

The Polaris Mobility Survey

An in-depth study of B2B and B2C customer mobility behaviors in the wake of the health crisis and environmental challenges

Towards new challenges for the mobility of tomorrow

As a market leader, D'Ieteren has always been at the forefront regarding mobility and the reinvention of our business. Our mission towards a fluid and sustainable mobility for everyone has been our reason to exist over the years.

In a unique context of change, dominated by a sanitary crisis, economical, societal and environmental challenges, we wanted to reevaluate our strategic vision and our approach to mobility.

The Polaris survey performed in 2021 is aimed at redefining the market trends and new customers behaviours in order to provide them with products and services aligned with their current and future needs.

THE METHODOLOGY

A large qualitative and quantitative market survey with a focus on both private and professional markets

EXPLORATIVE INTERVIEWS

with **experts from within and beyond mobility** (incl. mobility start-up, MaaS provider, public transport operator, mobility professor, financial services provider, energy provider,...)

FOCUS GROUPS

aiming to **qualitatively understand mobility needs, decision drivers & desired value propositions**

SURVEYS

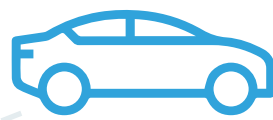
In-depth quantitative surveys with 3,800+ B2C consumers and ~300 B2Bs responsible for mobility of **small, medium and large companies**

Post-Covid economic conditions will affect the mobility market in two major areas: the **surge of eCommerce** and the structural integration of **tele/homeworking** in people's lives.



Reduced commuting will induce a **6% decrease** in the total number of trips to commute to work, to shop or for recreational purposes.

Cars will remain central to people's mobility, both in B2C and B2B markets and will still represent



56% of total trips by 2030



(x)EV cars will represent

2/3 of new car sales by 2030 in the Belgian market

The future will be electric and customers are looking for guidance.



B2B customers will drive the change towards **electrification and multimodal mobility services**

in order to address cost, sustainability and talent attractivity challenges.

Bike mobility is booming and will represent



15% of total trips by 2030

with **2/3** of bikes being **electric-battery powered**.



Multimodality will partially benefit from new incentives such as a mobility budget

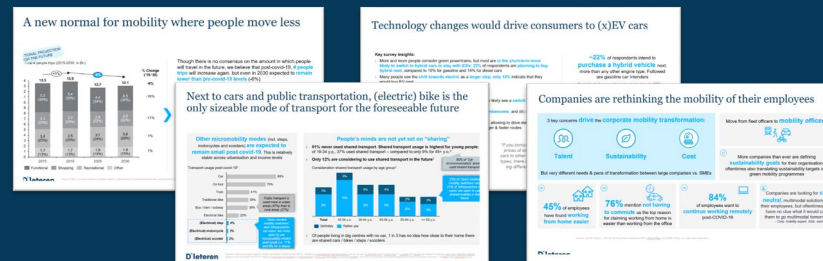
Car sharing will represent up to **12%** of trips

in particular in city centers and specific urban segments.

Discover the Polaris Mobility Survey results for free

We want to share the results of our survey with all involved mobility stakeholders and hope these insights will be a source of inspiration and innovation for all.

Even if the current societal and technological changes we are witnessing are huge and complex, we do share a common goal to tackle them effectively.



Download the survey :

dieteren.be/Polaris