



EV readiness “Vlaams-Brabant”

Report prepared by Profacts

May 2022

Background & research goals

In the light of organizing roadshows in Belgium, **Polestar is interested in the EV readiness** of different provinces. This study particularly focuses on **how car drivers perceive electric mobility**. Insights in the following topics are given:

- **General attitudes towards EV**
- **Purchase intent for EV (motives, barriers)**
- **Perceptions of EV adaptation of the environment**

To gather these insights, Profacts has set up a **nationwide quantitative research** among **2000 car drivers** in Belgium. The **results of Flemish Brabant (N=198)** are shared in this report.





METHOD

Online interviews



SAMPLE SIZE

N=198



WEIGHTING*

The sample was weighted to fit the population of Flemish Brabant (18+) on age and gender



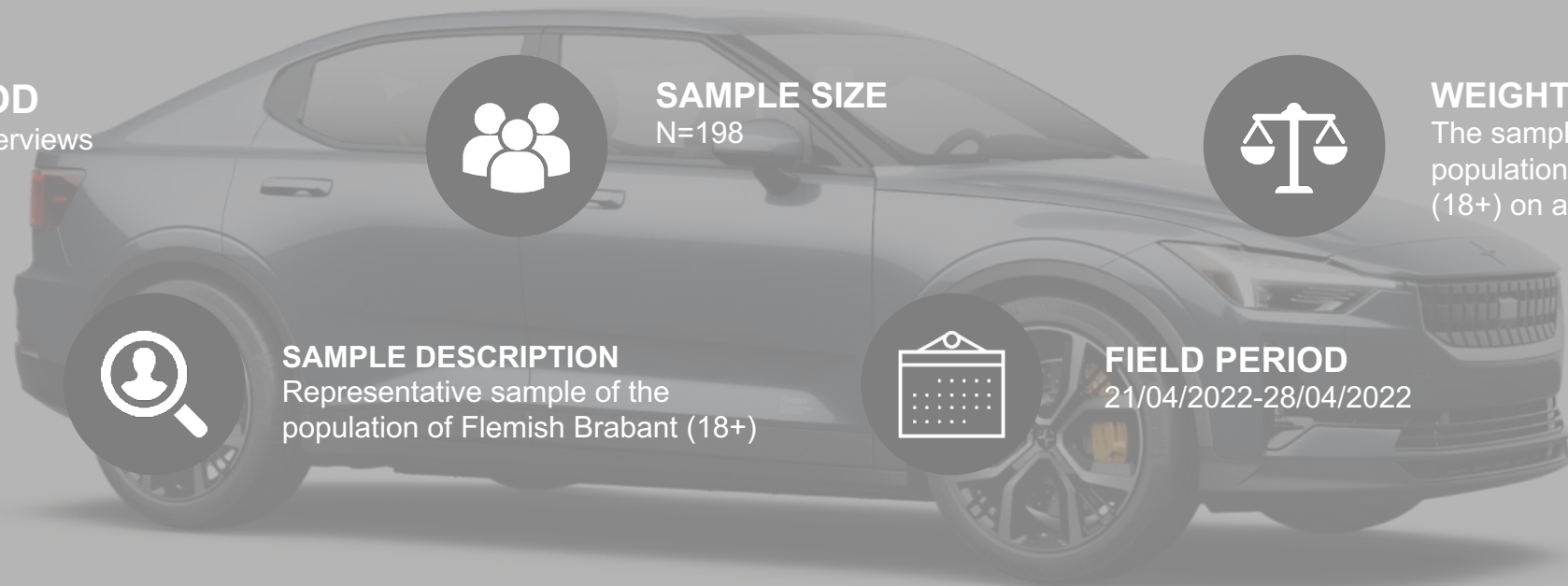
SAMPLE DESCRIPTION

Representative sample of the population of Flemish Brabant (18+)



FIELD PERIOD

21/04/2022-28/04/2022



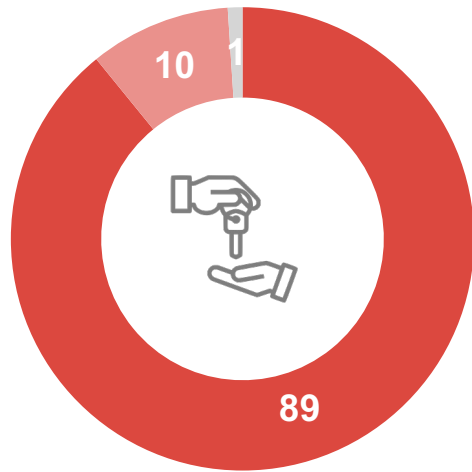
C^oNTENT

- 1 CAR USAGE
- 2 ATTITUDE TOWARDS EV
- 3 SURROUNDINGS IN RELATION TO EVs

About **1 in 10** of car drivers in Flemish Brabant drives a **company car**. **2% drives an EV**; the larger majority drives a gasoline or diesel car. 16% has driven an EV in the past.

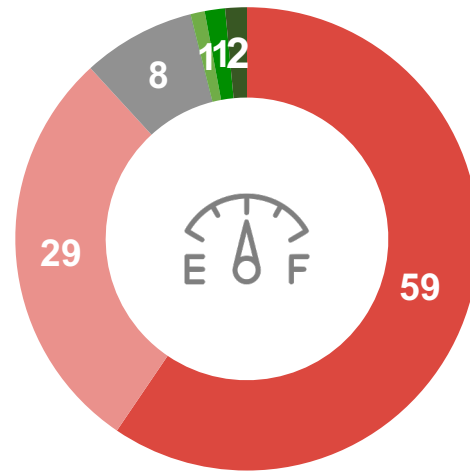
Car usage – Flemish Brabant

OWNERSHIP



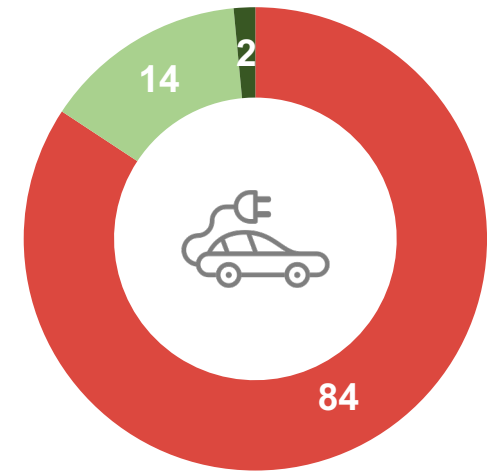
- Own car
- Company car
- Other

FUEL TYPE



- Gasoline
- Diesel
- Hybrid
- Hydrogen
- Gas (LPG, CNG, HCNG,...)
- Biofuel
- Electric

EVER DRIVEN EV



- No EV and has never driven one
- No EV, but has already driven one
- Drives electric

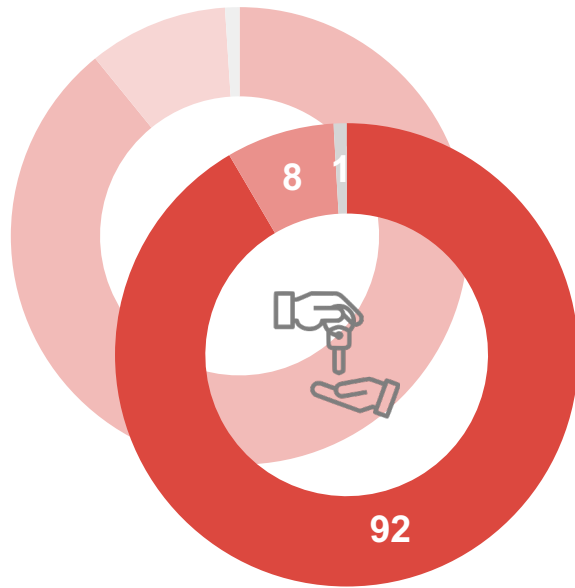
Base:
Question:
electric car?
ABC

Car drivers in Flemish Brabant (N=198)
Q1.1 What type of car do you usually drive? / Q1.3 What fuel does the car you drive most often run on? / Q1.4 Have you ever driven an all-
Significant difference (95%)

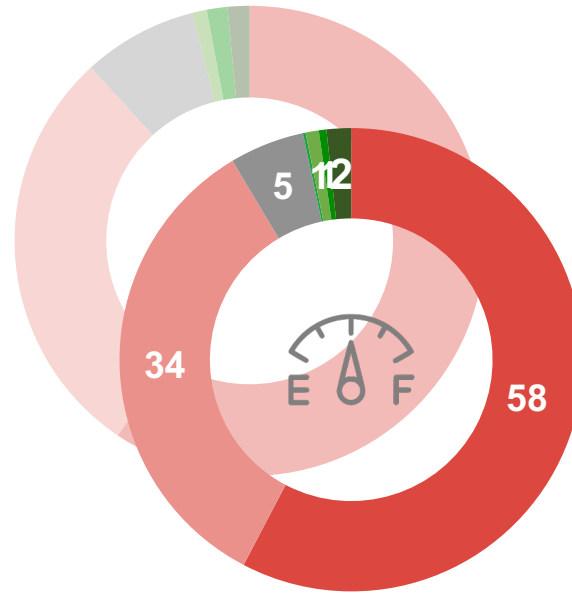
... This is in line with national results. Slightly more people have driven an EV at least once.

Car usage – Belgium

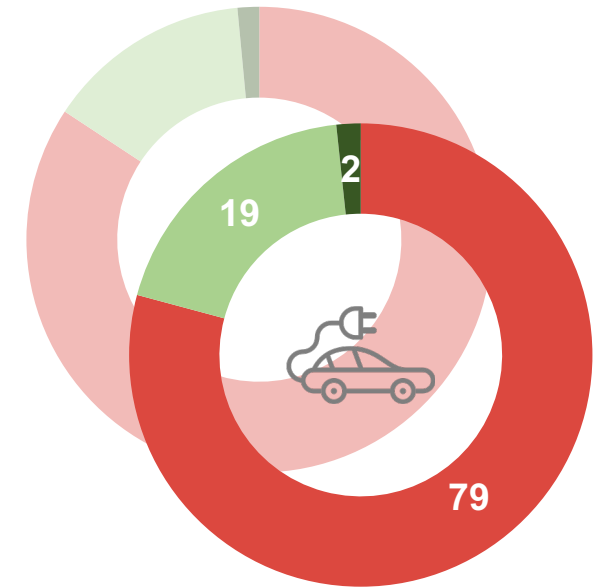
OWNERSHIP



FUEL TYPE



EVER DRIVEN EV

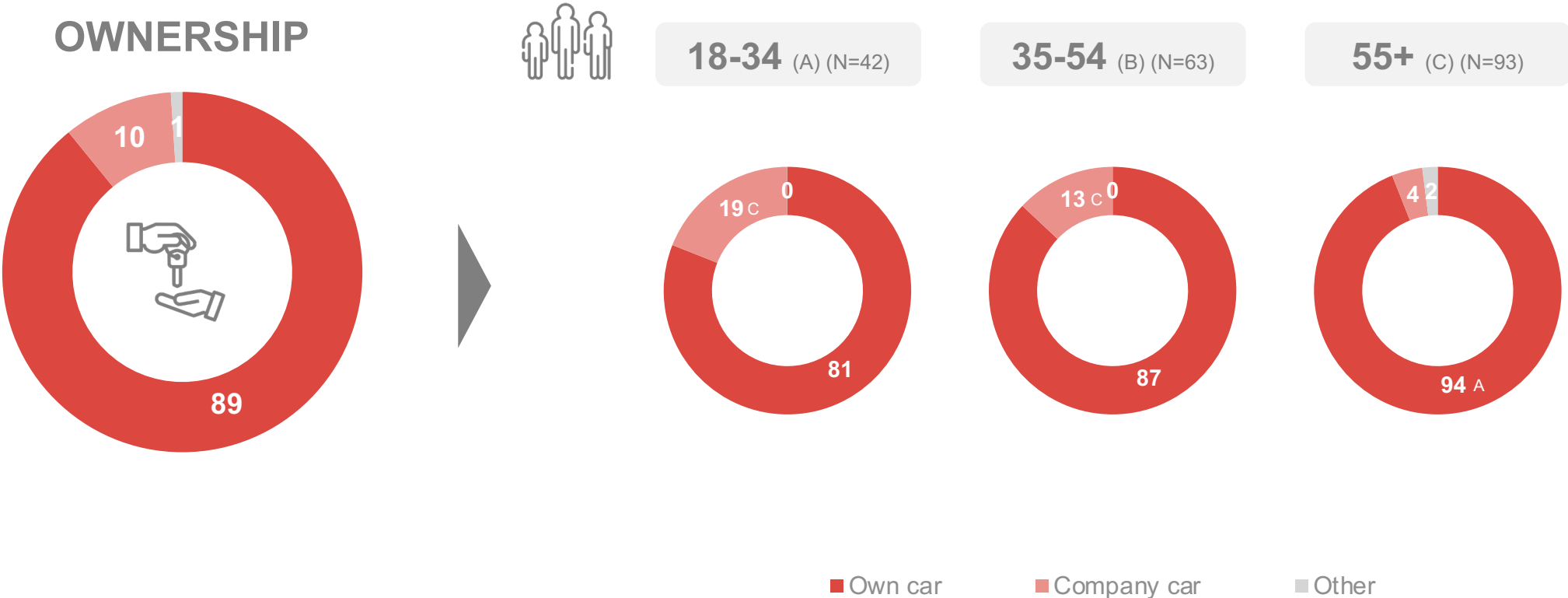


Base:
Question:
electric car?
ABC

Car drivers in Belgium (N=2008)
Q1.1 What type of car do you usually drive? / Q1.3 What fuel does the car you drive most often run on? / Q1.4 Have you ever driven an all-
Significant difference (95%)

Younger drivers more often drive with **company cars** than 55+. Which is logical as in the latter group, more drivers are in retirement already.

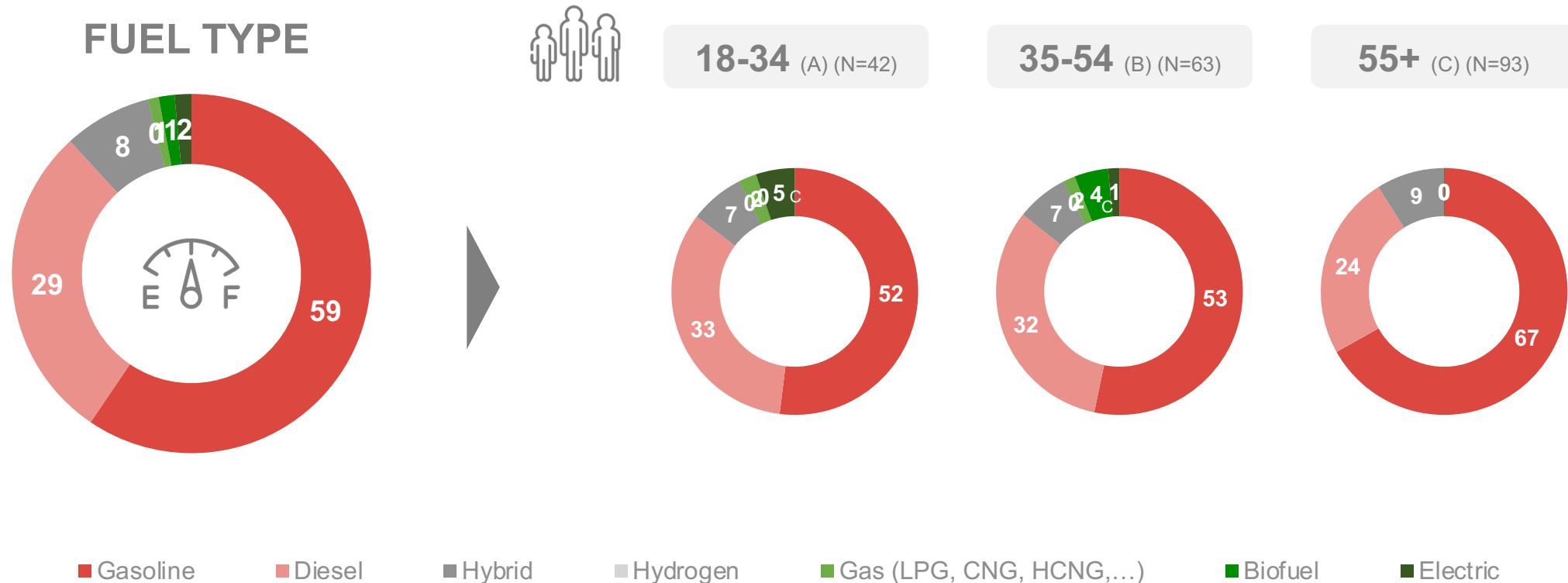
Ownership – Deep dive



Base: Car drivers in Flemish Brabant (N=198)
 Question: Q1.1 What type of car do you usually drive
 ABC Significant difference (95%)

EVs are more popular within the youngest group of drivers. Gasoline and diesel cars are more strongly represented among the 55+.

Fuel type – Deep dive

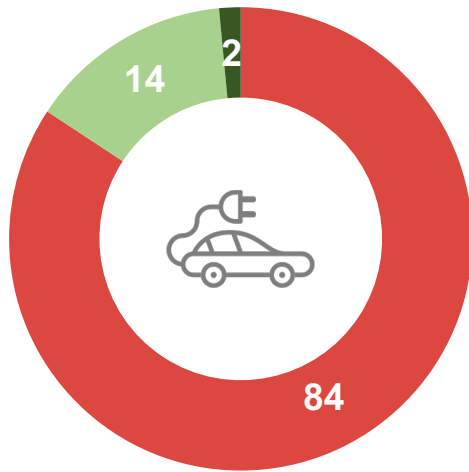


Base: Car drivers in Flemish Brabant that own a car or drive a company car (N=196)
 Question: Q1.3 What fuel does the car you drive most often run on?
 ABC Significant difference (95%)

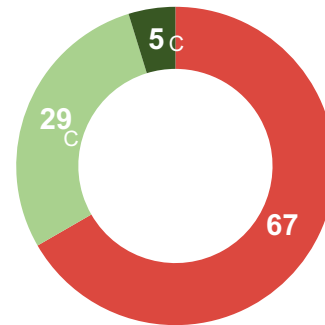
55+ car drivers are less experienced with EV.

Ever driven EV – Deep dive

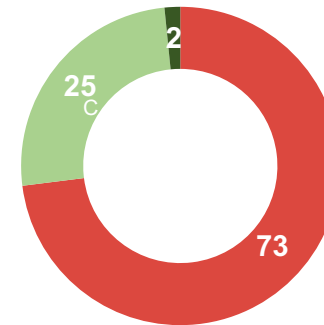
EVER DRIVEN EV



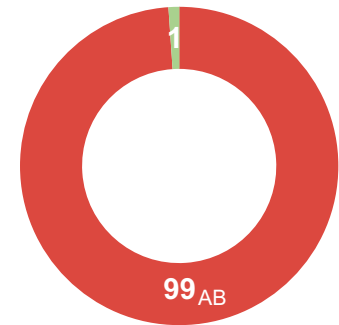
18-34 (A) (N=42)



35-54 (B) (N=63)



55+ (C) (N=93)



■ No EV and has never driven one

■ No EV, but has already driven one

■ Drives electric

Base:
Question:
ABC

Car drivers in Flemish Brabant that own a car or drive a company car (N=198)
Q1.3 What fuel does the car you drive most often run on? / Q1.4 Have you ever driven an all-electric car?
Significant difference (95%)

CAR USAGE

Summary

The amount of **car drivers owning an EV** in **Flemish Brabant** is in line with national Belgian results.

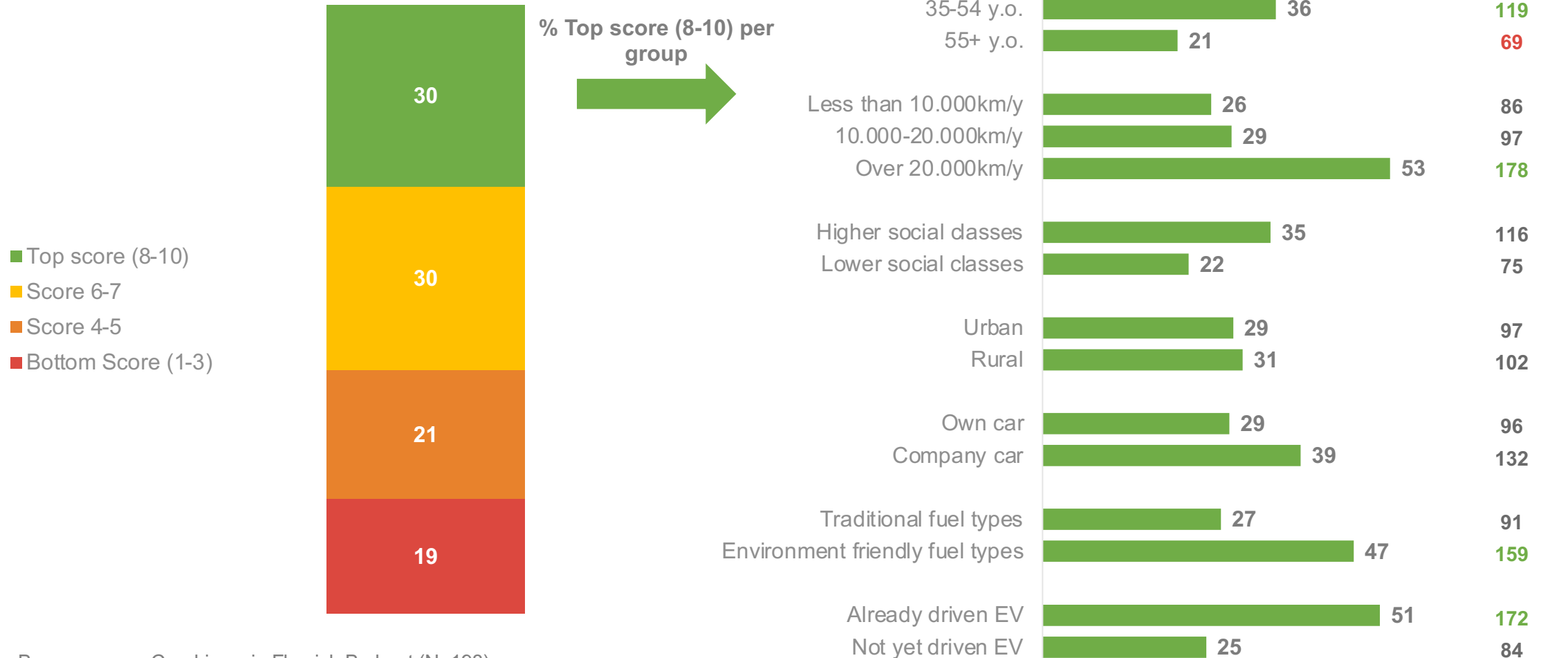
14% has **already driven an EV**, even though not owning one.

Especially among **people under 55** years old interest in EV is rising. More than **1 in 4 already has experience** with EVs and in the **18-34 y.o.** group, **5% drives electric**.



The **general attitude** towards EV is **mixed**, about one third is enthusiastic. Especially **youth, high mileage, and experience with environment-friendly** and specifically **electric cars** fuel a positive attitude.

General attitude towards EV



Base: Car drivers in Flemish Brabant (N=198)
 Question: Q2.1 How do you feel about EVs in general?
 ABC Significant difference (95%)

A significant **effect of experience** with EVs on the general attitude can be noticed.

General attitude towards EV – zoom on experience



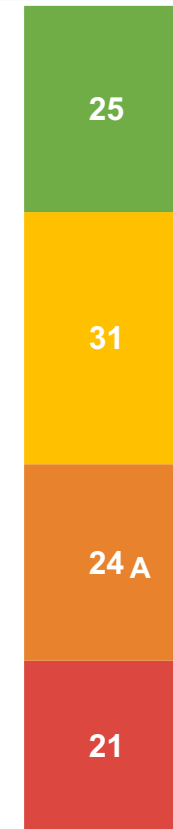
Already driven EV

(A) (N=29*)

Never driven EV

(B) (N=166)

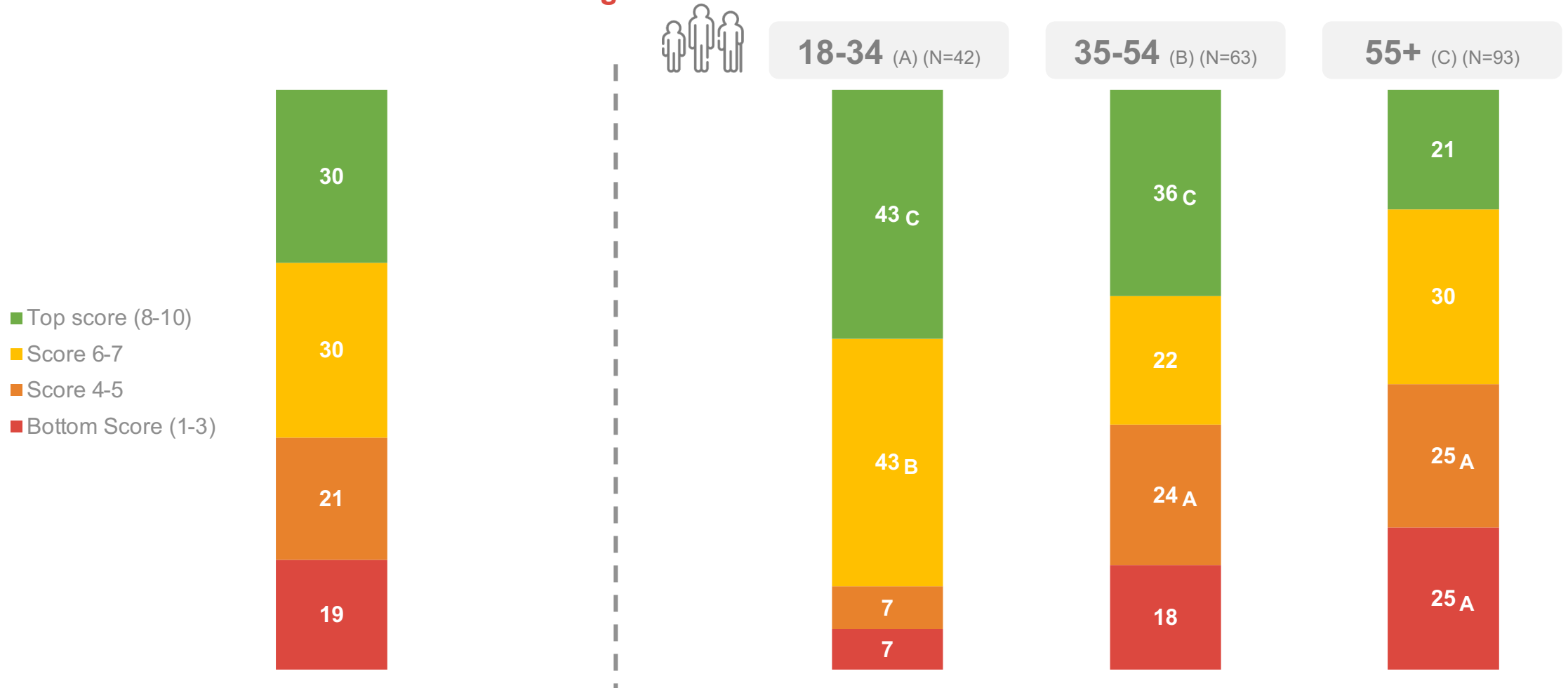
- Top score (8-10)
- Score 6-7
- Score 4-5
- Bottom Score (1-3)



Base: Car drivers in Flemish Brabant (N=198)
Question: Q2.1 How do you feel about EVs in general?
ABC Significant difference (95%)

Younger car drivers are most **positive** towards EV. More experience could be at the basis, as younger people either have an EV or have ever driven an EV more often.

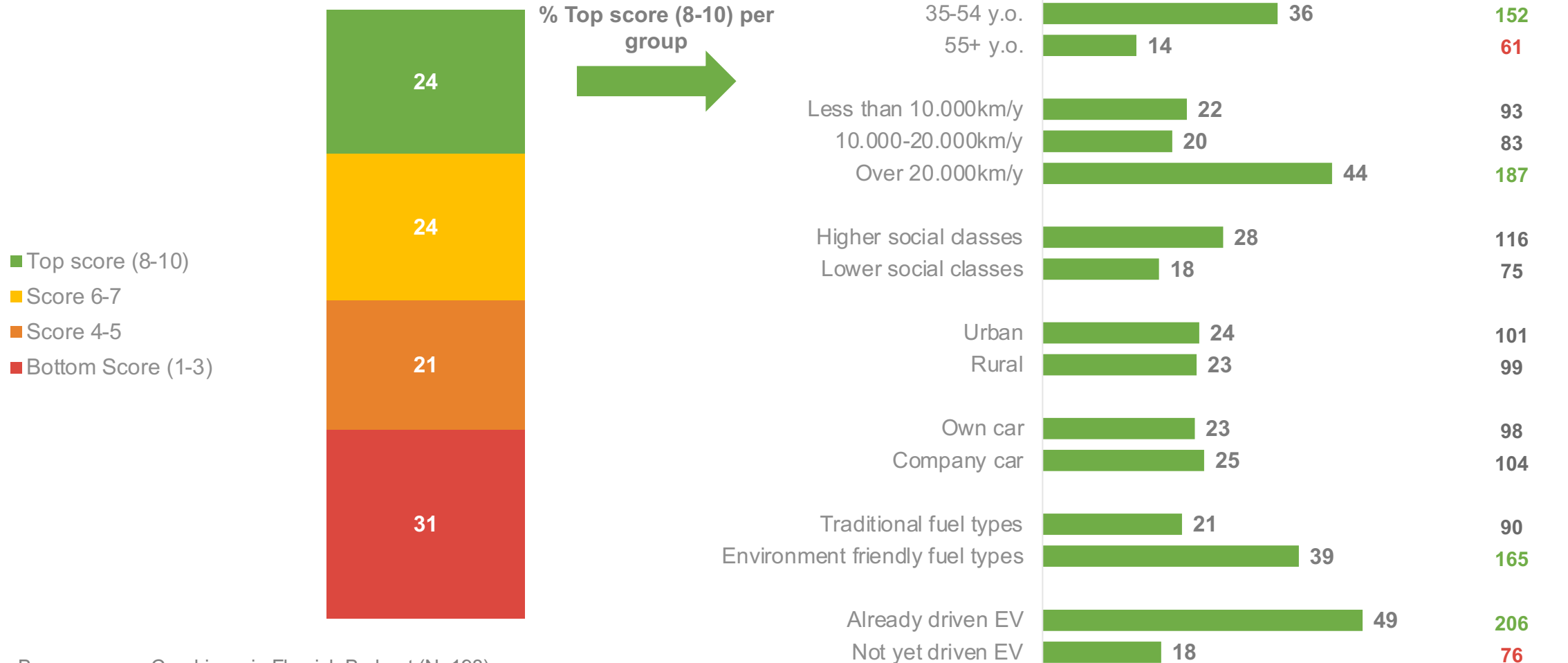
General attitude towards EV – zoom on age



Base: Car drivers in Flemish Brabant (N=198)
 Question: Q2.1 How do you feel about EVs in general?
 ABC Significant difference (95%)

One fourth of car drivers in Flemish Brabant is convinced that their **next privately owned car** will be an **EV**. This feeling is stronger for **working adults, people with high mileage** and **people having experience with environment friendly** and specifically **electric cars**. Of those having a very positive attitude, 66% has a high purchase intent.

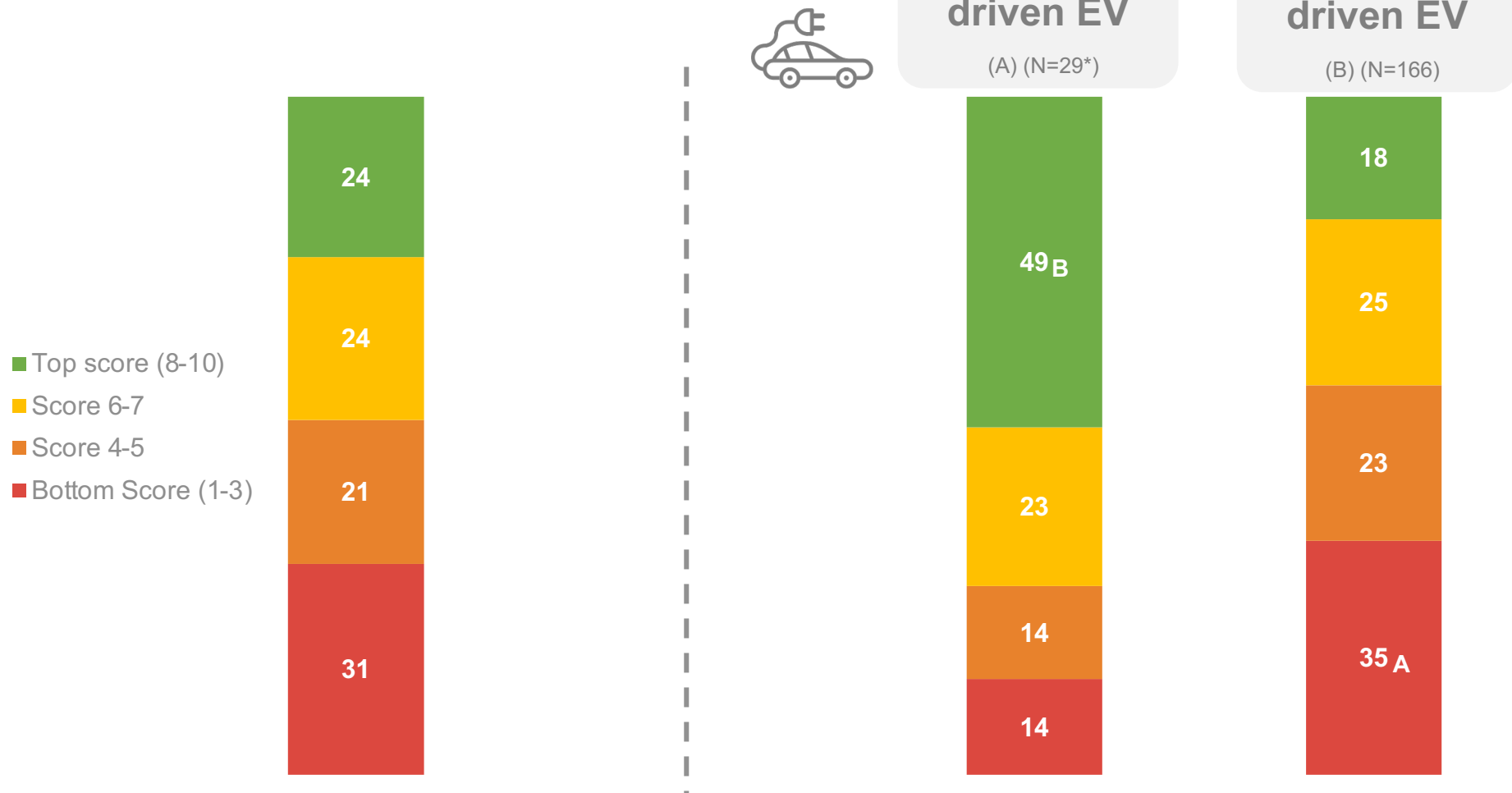
Purchase intent EV



Base: Car drivers in Flemish Brabant (N=198)
 Question: Q2.2 If you were to buy a new car of your own soon, how likely would you be to choose an EV?
 ABC Significant difference (95%)

Experience with EV appears to be a strong predictor of purchase intent. Half of this subgroup intends to purchase an EV as next privately owned car.

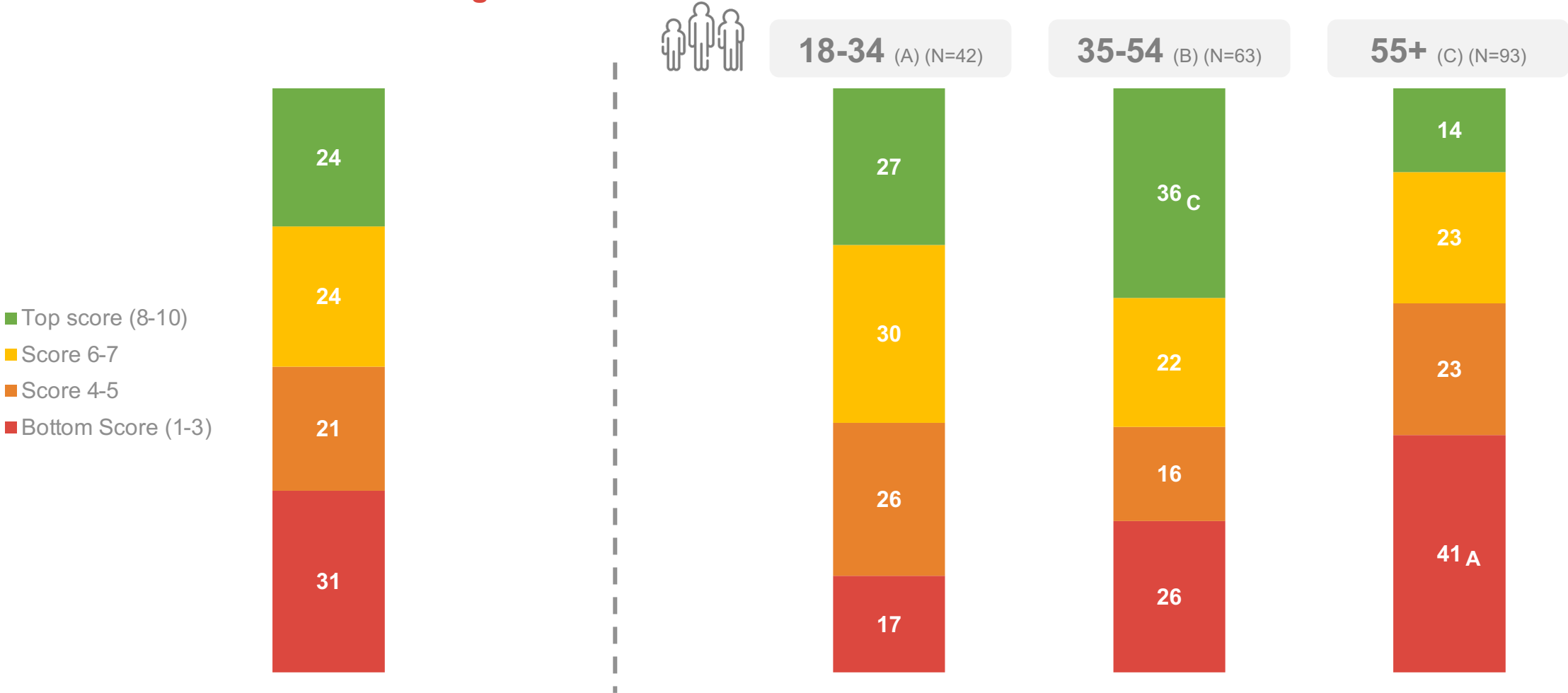
Purchase intent EV – zoom on experience



Base: Car drivers in Flemish Brabant (N=198)
 Question: Q2.2 If you were to buy a new car of your own soon, how likely would you be to choose an EV?
 ABC Significant difference (95%)

While **adults between 35 and 54 years old** have a **high purchase intent for EV**, this cannot be said from 55+. Again, a lack of experience could be at the base for this finding.

Purchase intent EV – zoom on age



Base: Car drivers in Flemish Brabant (N=198)
Question: Q2.2 If you were to buy a new car of your own soon, how likely would you be to choose an EV?
ABC Significant difference (95%)

At first sight, car drivers with a company car are **more willing to choose an EV as company car than to buy one for own possession.**

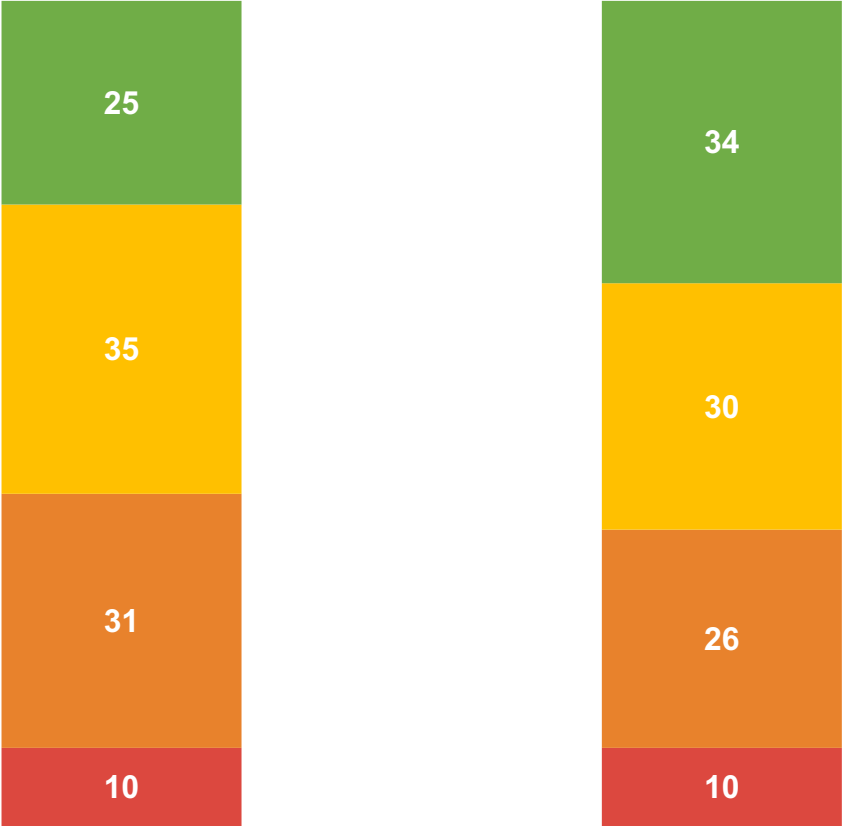
Purchase intent EV – as own car vs. as company car



As own car (A) (N=20*)

As company car (B) (N=20*)

- Top score (8-10)
- Score 6-7
- Score 4-5
- Bottom Score (1-3)



Base: Car drivers driving with company car (N=20)
Question: Q2.2 / Q2.3 If you were to buy a new car of your own / choose a new company car soon, how likely would you be to choose an EV?
ABC: Significant difference (95%)

These results are in line with national results, indicating that companies are important for the transition to electric mobility.

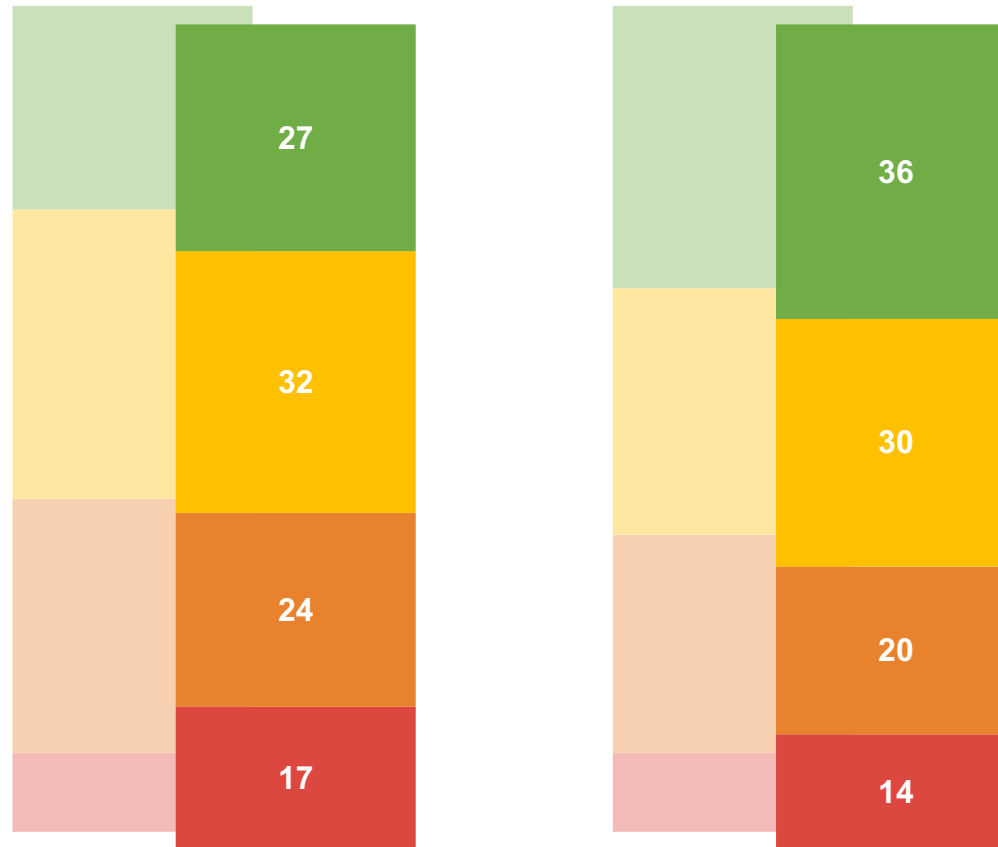
Purchase intent EV – Belgium



As own car (A) (N=155)

As company car (B) (N=155)

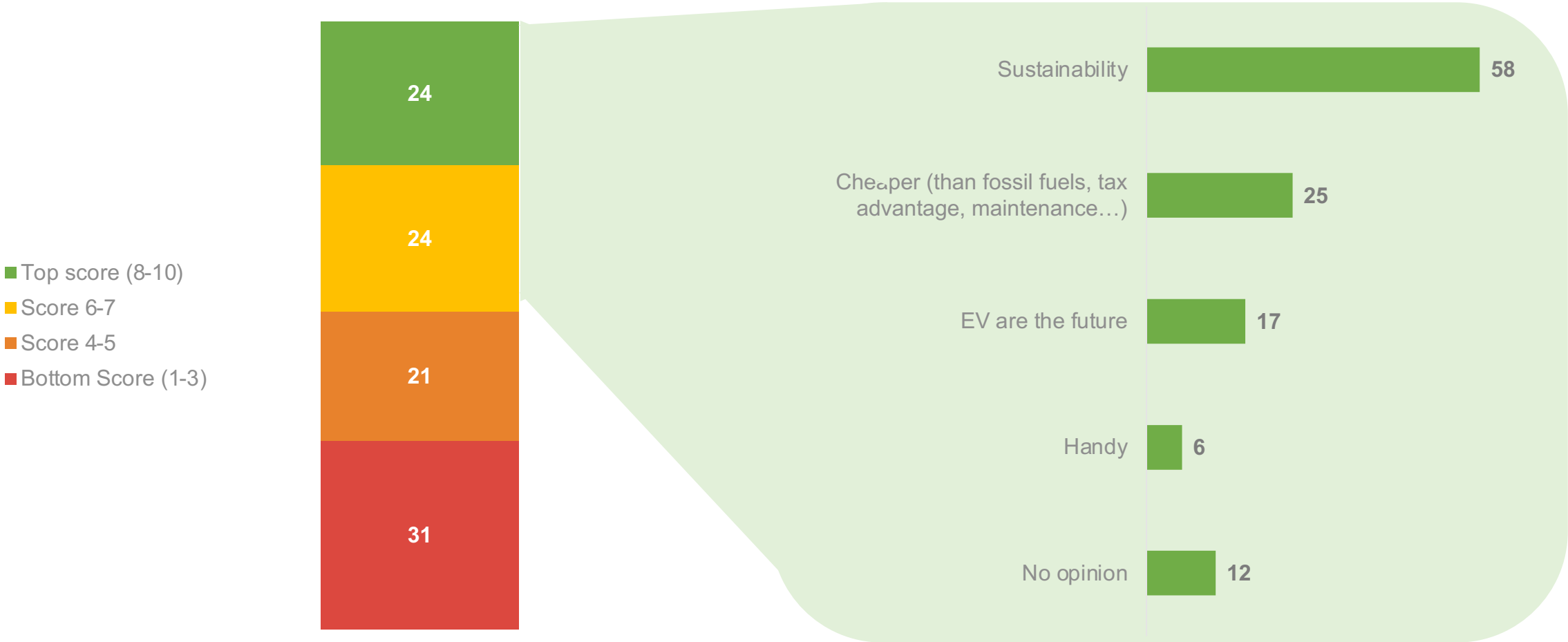
- Top score (8-10)
- Score 6-7
- Score 4-5
- Bottom Score (1-3)



Base: Car drivers in Belgium driving with company car (N=155)
Question: Q2.2 / Q2.3 If you were to buy a new car of your own / choose a new company car soon, how likely would you be to choose an EV?
ABC: Significant difference (95%)

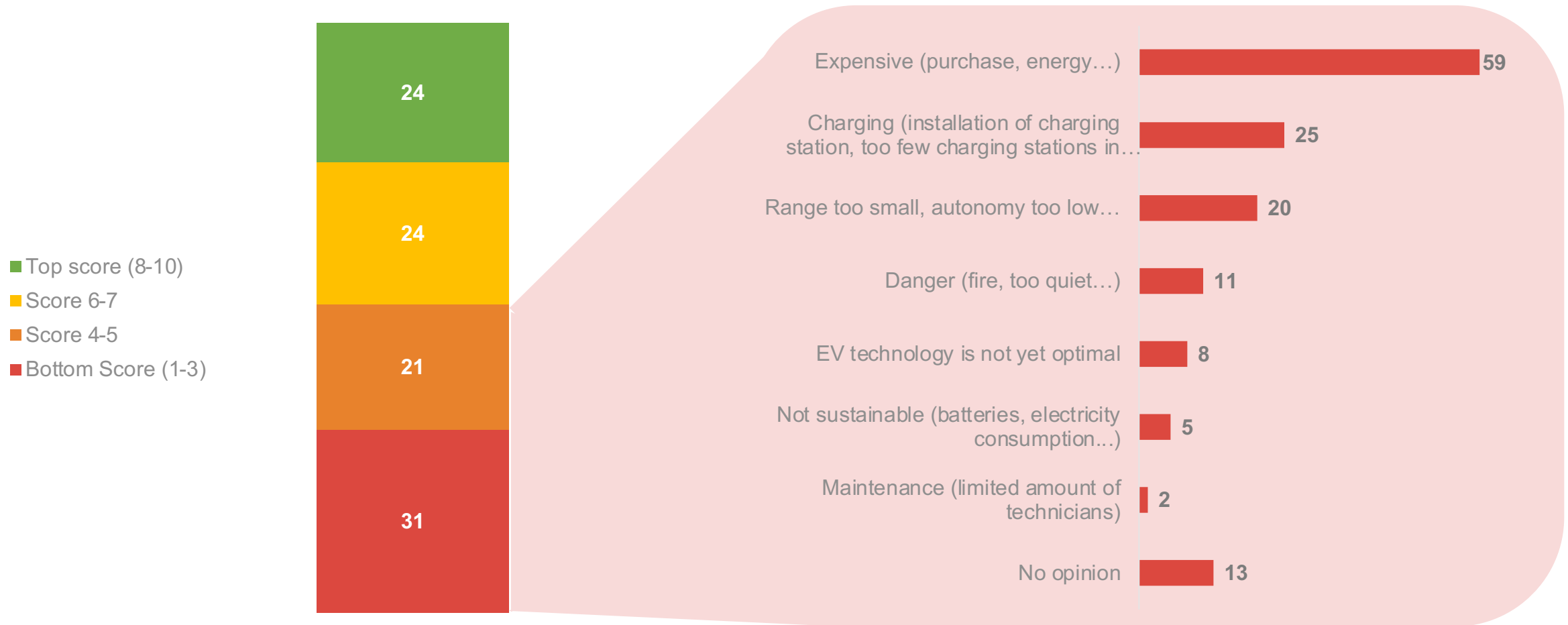
Main **motivators** to purchase an EV are **sustainability** and **monetary reasons** (increasing fuel prices, tax advantages...).

Drivers to purchase EV



The major **barriers**, however, are an **expensive purchase cost**, perceptions of **current charging conditions**, and – related – **the limited range**.

Barriers to purchase EV



ATTITUDES TOWARDS EV

Summary

General **perceptions** toward EVs are **mixed**. Those already having a positive attitude also have a high purchase intent (**conversion of 66%**).

In total, **1 in 4** car drivers **intent to buy an EV** as next own vehicle. Purchase intent is **higher** when it comes to a **company car**.

Main **drivers** are **sustainability** and **monetary reasons**. **Barriers** are the **purchase cost, charging conditions**, and the **limited range**.

An **EV experience** positively relates to both **attitudes** and **purchase intent**.

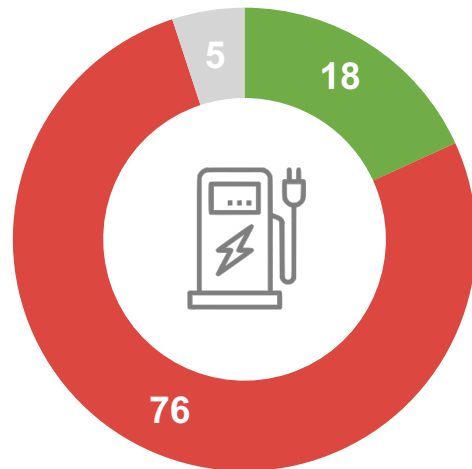


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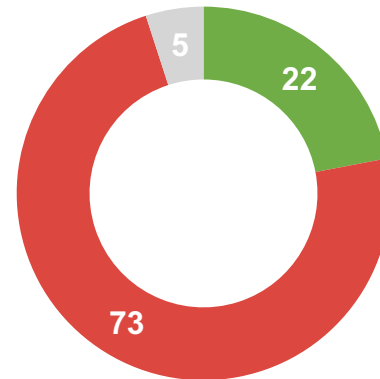
1 in 5 has access to a nearby public charging station in their street or adjacent streets. This percentage is slightly lower in rural areas.

Efforts of municipality

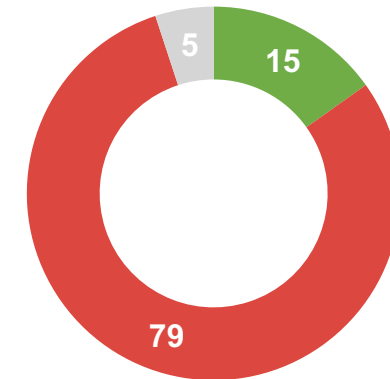
NEARBY PUBLIC CHARGING STATION



Urban areas (A) (N=87)



Rural areas (B) (N=103)



■ Yes ■ No ■ Don't know

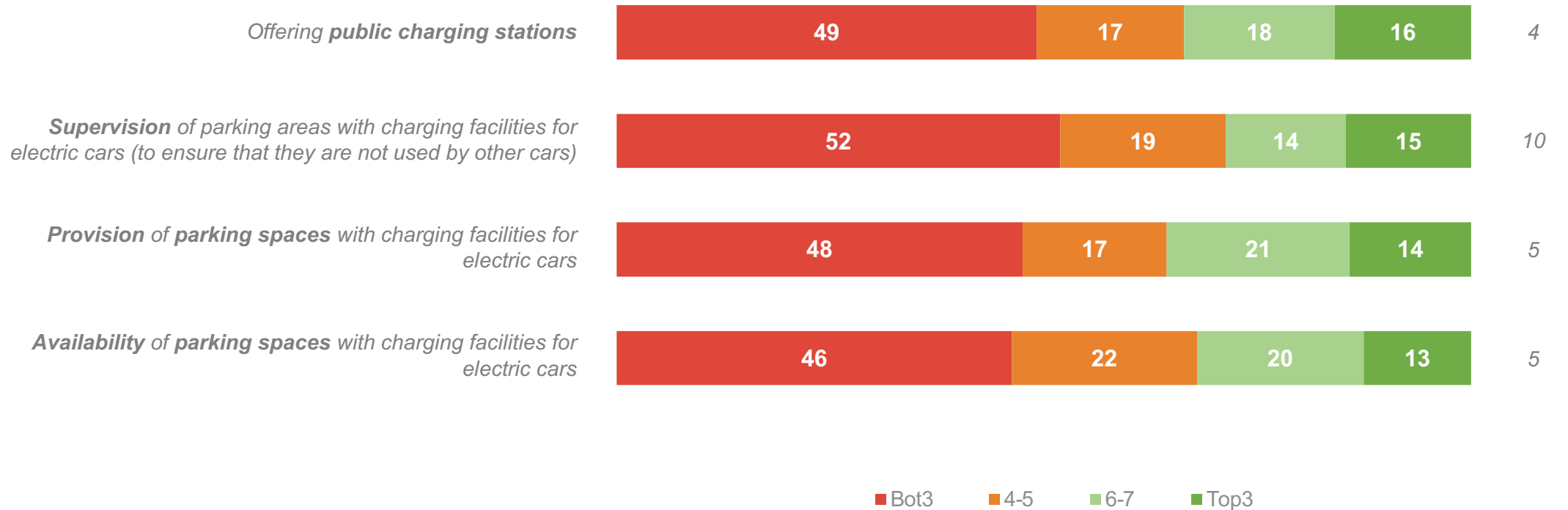
Base: Car drivers in Flemish Brabant (N=198)
Question: Q3.6 Is there a public charging station on your street (or adjacent streets)?
ABC Significant difference (95%)

Car drivers still perceive that **municipalities** still **underperform** when it comes to **providing** enough **public charging stations and parking spaces** with these facilities.

Efforts of municipality

Car drivers' perceptions on...

No opinion

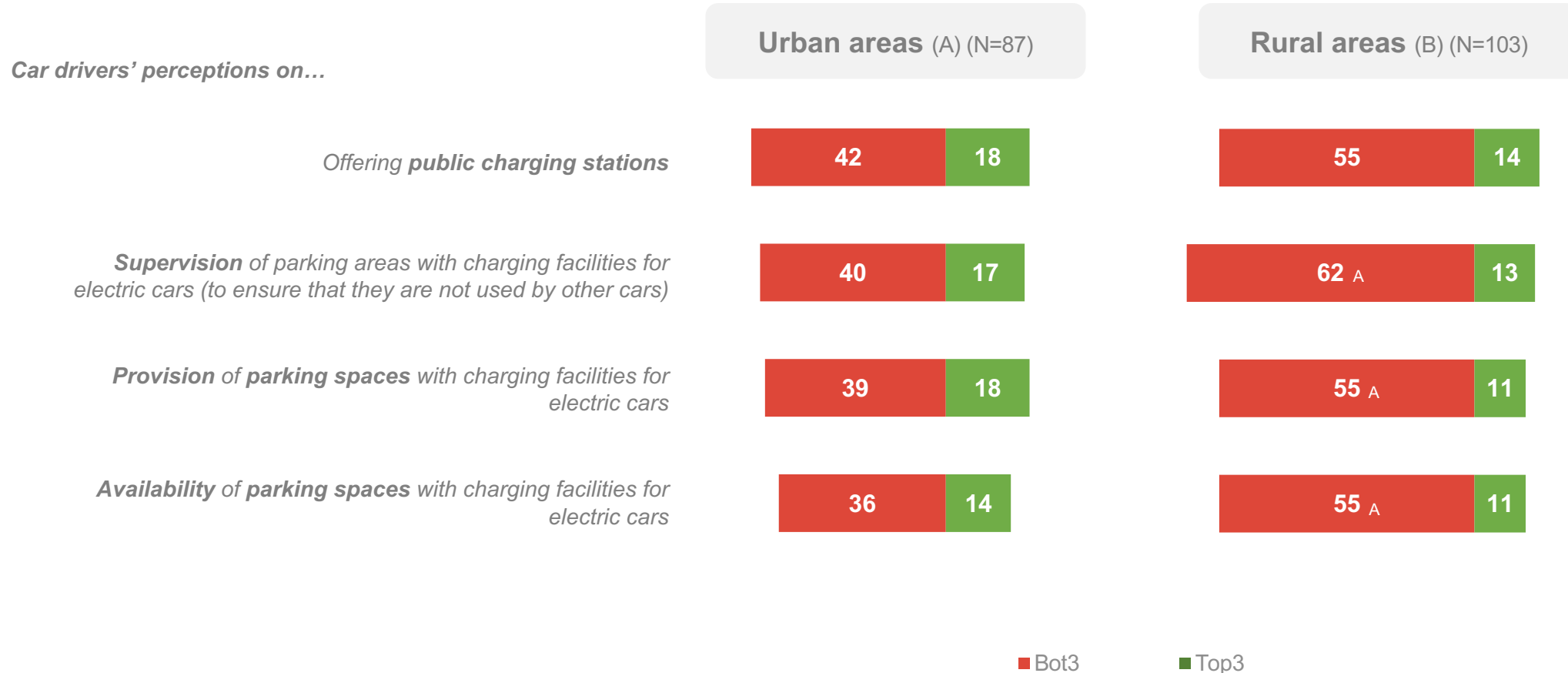


Base:
Question:
ABC

Car drivers in Flemish Brabant (N=198)
Q3.1 How well do you feel your city or village scores in terms of the following aspects related to electric vehicles?
Significant difference (95%)

Municipalities in rural areas get lower scores on the provision of EV facilities.

Efforts of municipality



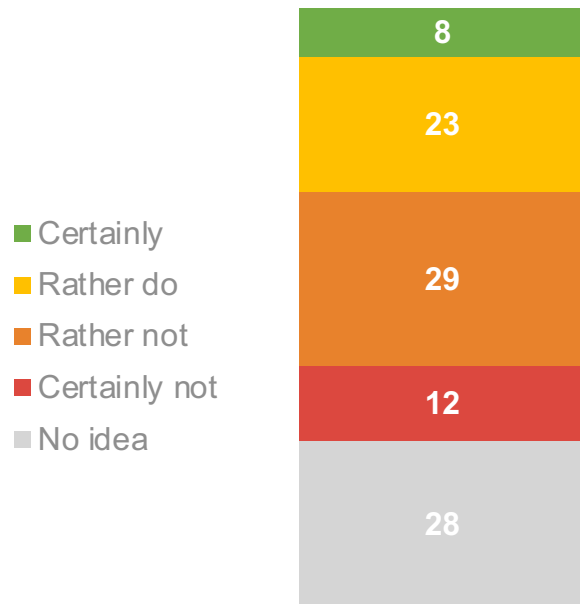
Base:
Question:
ABC

Car drivers in Flemish Brabant (N=198)
Q3.1 How well do you feel your city or village scores in terms of the following aspects related to electric vehicles?
Significant difference (95%)

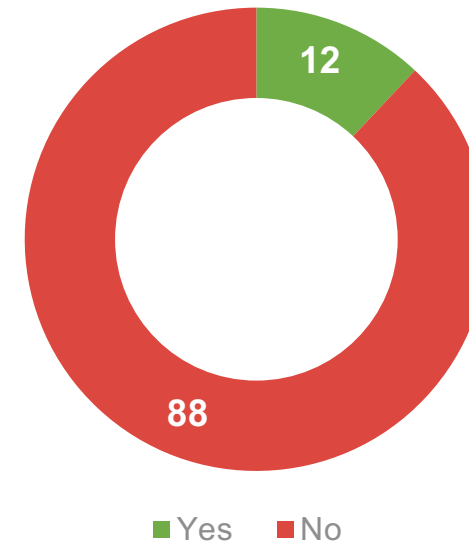
About 1 in 10 indicates that they have used a charging parking space without driving an electric/hybrid car.

Misuse of parking places with charging facilities

DO OTHERS
WRONGLY USE
CHARGING SPACES?



HAVE YOU WRONGLY
USED A CHARGING
SPACE?



Base:
Question:
ABC

Car drivers in Flemish Brabant (N=198)
Q3.2 Do you feel that others abuse parking spaces with charging facilities for electric cars?
Q3.3 Have you ever parked in a parking space with charging facilities for electric cars while not driving an electric car yourself?
Significant difference (95%)

SURROUNDINGS IN RELATION TO EV'S

Summary

In the perception of car drivers, **surroundings are not yet well-adapted to EV**. 18% has access to a nearby charging station and half of the car drivers give bad ratings concerning public charging stations and parking spaces for EVs. Overall, **rural areas** score **worse** on facilities for EVs.

1 in 3 believes that parking spots for EVs are being misused. Approximately **10%** of the car drivers have **wrongfully parked** on an EV parking spot themselves at least once.



3



Questions or feedback?

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