



Electric Vehicle

surveys

October 2024

EV survey (N=1.639)

- N=1.639
- Average car age: 1,6 years

- Split Fleet vs private

- Fleet: N=1367
- Private: N= 272

- Split per province

Brussels-Capital region	3,29%
Province of Antwerpen	19,59%
Province of Brabant Wallon	4,64%
Province of Hainaut	4,76%
Province of Liège	5,19%
Province of Limburg	10,25%
Province of Luxembourg	0,98%
Province of Namur	3,48%
Province of Oost-Vlaanderen	19,28%
Province of Vlaams-Brabant	15,74%
Province of West-Vlaanderen	11,84%

Key findings

- **Global EV Satisfaction: 80%** of EV customers are **globally satisfied** of their vehicle
- **Private drivers** have a **higher satisfaction** than the **fleet drivers**

+ Main Reasons for Satisfaction:

- Pleasant driving experience (performance, acceleration & quiet driving)
- Comfort
- Interior space
- Reduced environmental impact
- Low maintenance costs

■ Main Reasons for Dissatisfaction:

- Limited range (especially in the winter period)
- Long charging times
- Software and electronic issues
- After-sales services

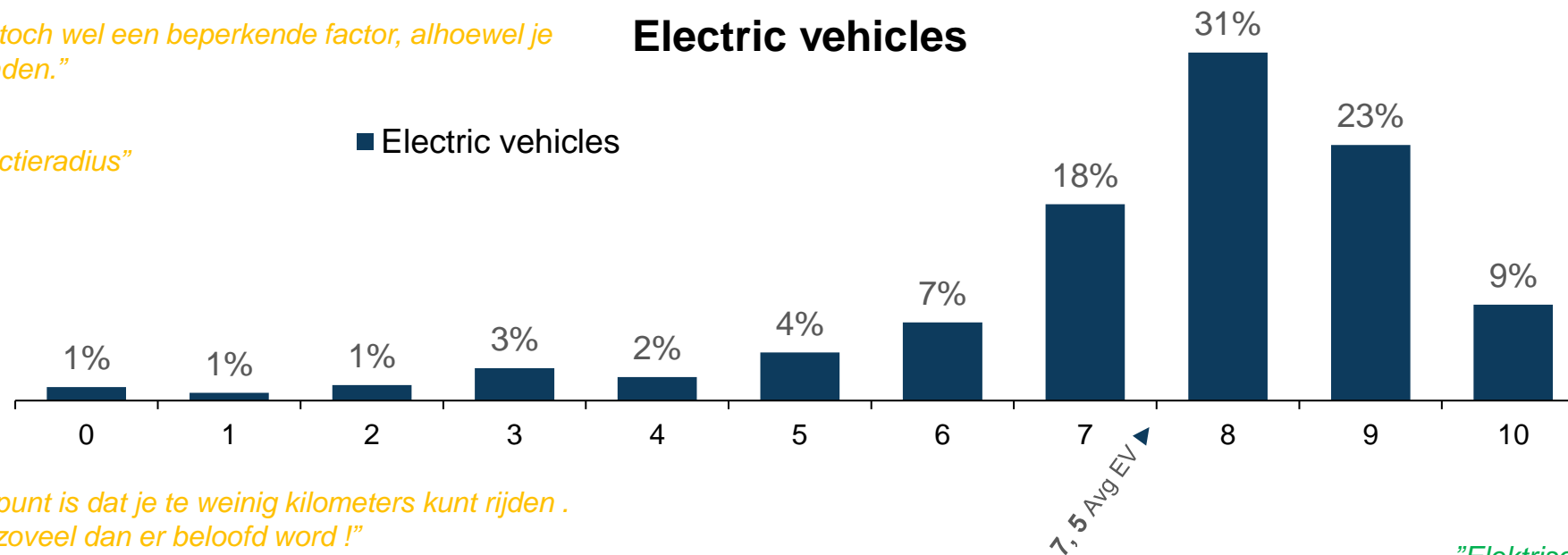
Global EV satisfaction

80% of EV customers are globally satisfied ($\geq 7/10$) of their vehicle but only 32% are fully satisfied ($\geq 9/10$).

“de range is toch wel een beperkende factor, alhoewel je overal kan laden.”

“veel te lage actieradius”

Electric vehicles



“rijcomfort, heel fijne auto”

“Rijgemak en heel wat bijkomende "comfort" functies”

“Het is telkens een plezier om te rijden”

“Zou geen hybride of benzine meer willen.”

“aangenaam rijden + voldoende rijbereik.”

“Enige minpunt is dat je te weinig kilometers kunt rijden . Zeker niet zoveel dan er beloofd word !”

“Zalig om mee te rijden, stil, ... Maar wat een gedoe, steeds moeten laden, laden mislukt en dan sta je daar...”

“De auto rijdt fantastisch. Jammer dat de actieradius wat tegenvalt.”

“Elektrisch rijden was een morele keuze voor mij, maar nu ik ermee rijd is het gewoon veel aangener rijden..”

“Erg comfortabel. Enige wat beter kan, is de range.”

Base: CX EV Survey Total sample (N=1.639)

Calculation: Frequency

Question: Pouvez-vous indiquer votre satisfaction par rapport à votre voiture électrique

Source: Medallia 11 2024

Main reasons of the satisfaction score

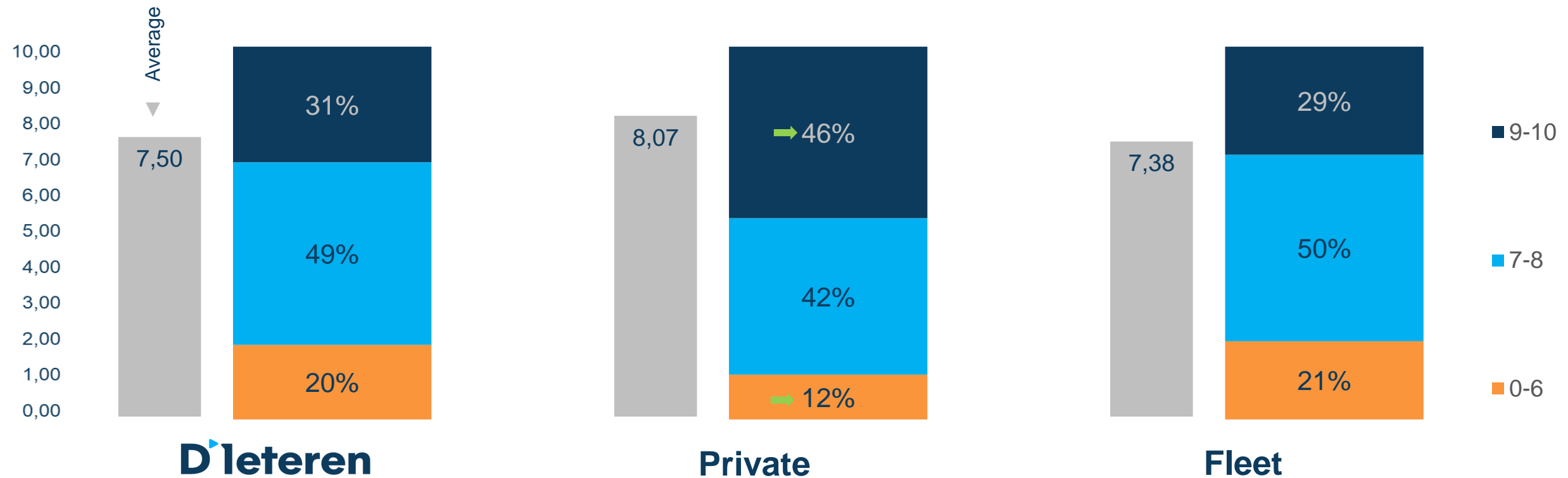
Why did you give this score?

- **Pleasant driving experience:** Users appreciate the **driving comfort, smoothness, and power of electric vehicles**. The quiet ride and lack of vibrations are also frequently mentioned positives.
- **Comfort and interior space:** Users appreciate the **seat comfort and interior space** of electric vehicles. The quality of the interior and comfort features are often mentioned as positives.
- Users also mention positive aspects such as **reduced environmental impact and low maintenance costs**.
- **Range and charging issues:** Many users complain about the **limited range** of electric vehicles, **especially in winter**. Long charging times and difficulties finding reliable charging stations are also common
- Some complaint about **high costs of electric vehicles**.



Global EV satisfaction Fleet vs private

Almost 1/2 of Private customers are fully satisfied of their EV and only 12% of them are disappointed. Fleet customers less satisfied than Private customers.



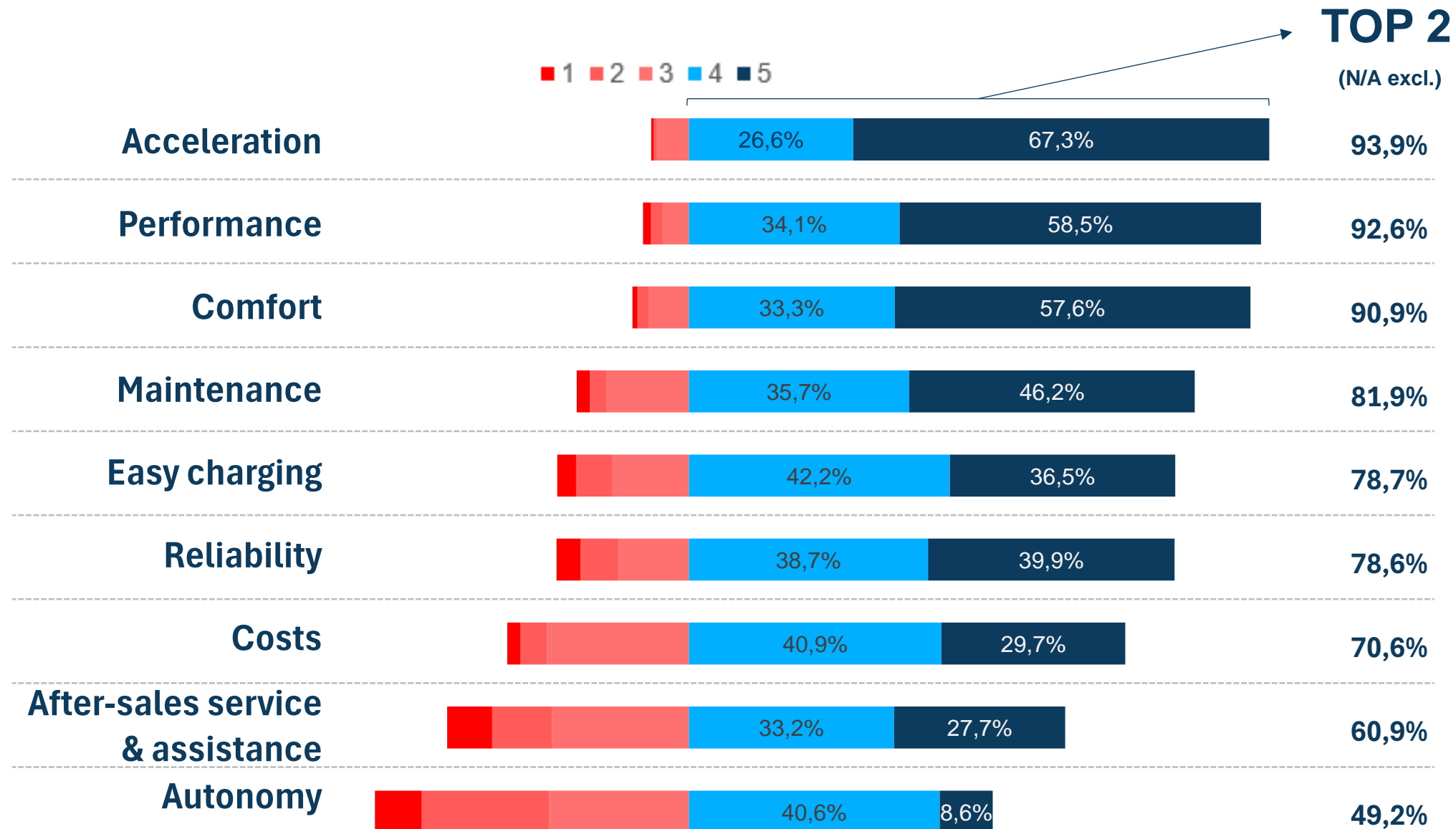
Base: CX EV Survey Total sample (N=1.639); Fleet (n=1.367); Private (n=272)

Calculation: Frequency & Average

Question: Pouvez-vous indiquer votre satisfaction par rapport à votre voiture électrique ?

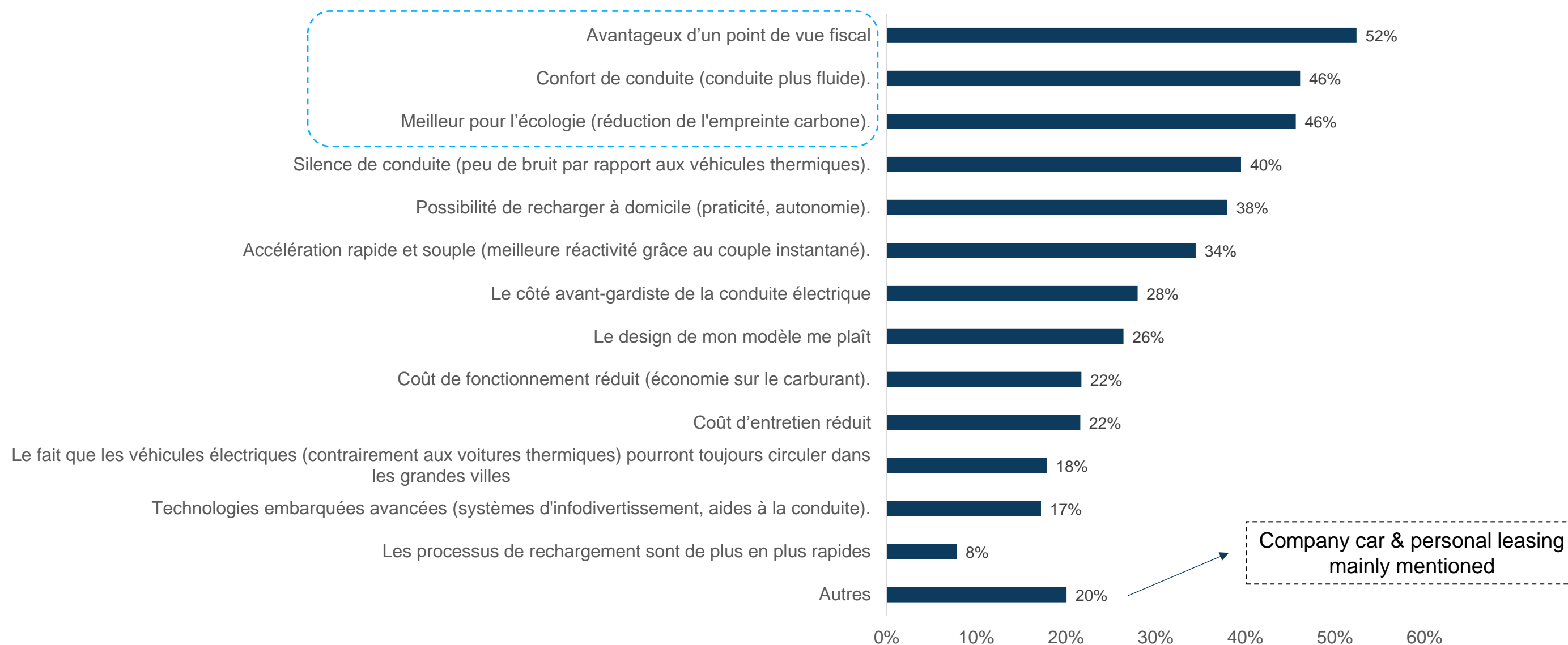
Source: Medallia 11 2024

Performance, acceleration & comfort are strongly put in highlight.
Autonomy & after-sales score clearly less satisfying.



What consolidate them in their choice

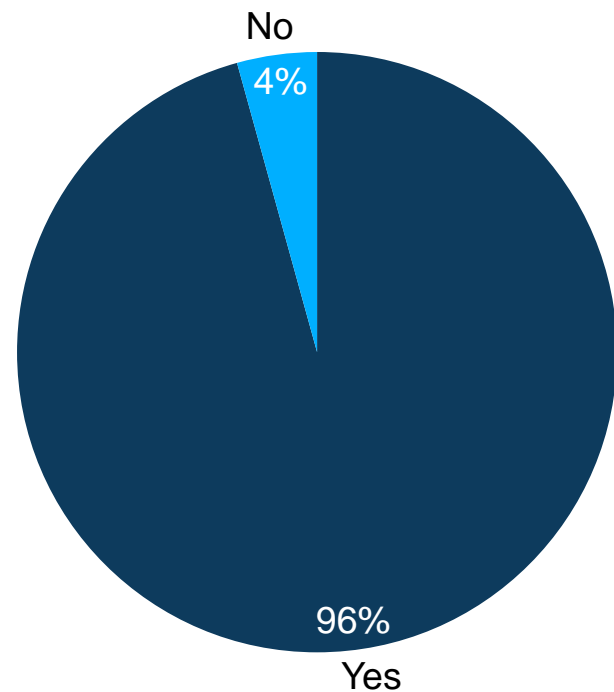
Fiscality – Comfort – Ecology are the main satisfaction drivers



The next car will be also an electric one. EV drivers are convinced by their choice even more for the B2C!

Previous car

was in most cases a combustion car



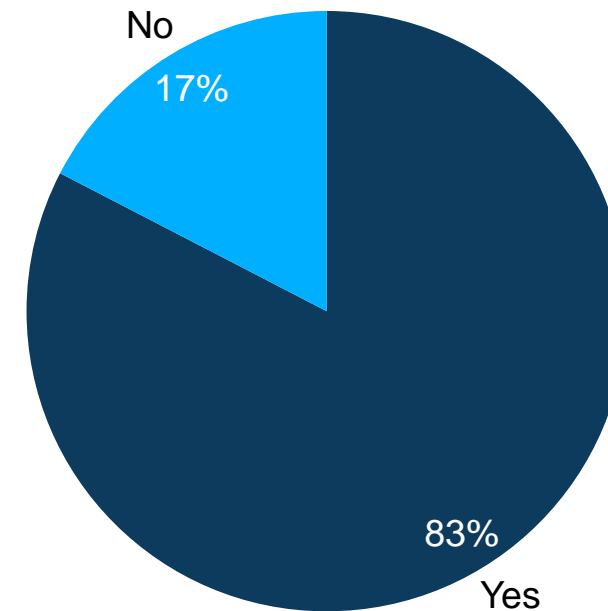
Current

D'leteren

EV

Next car

will remain in most cases an electric one

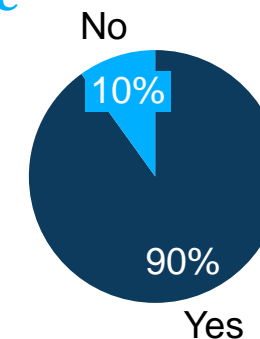


If not : hybrid is mainly mentioned with 60,1%

Main reason to not want an electric for the next one: autonomy issue with the stress associated

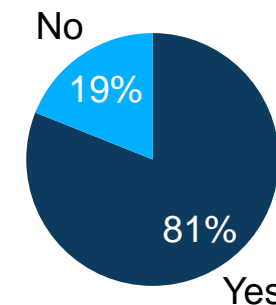
This conclusion is aligned with the results of the Touring surveys: *«Un constat intéressant de l'enquête est que ceux qui conduisent déjà une voiture électrique choisiraient à nouveau une voiture électrique dans 83,15 % des cas »*

Private

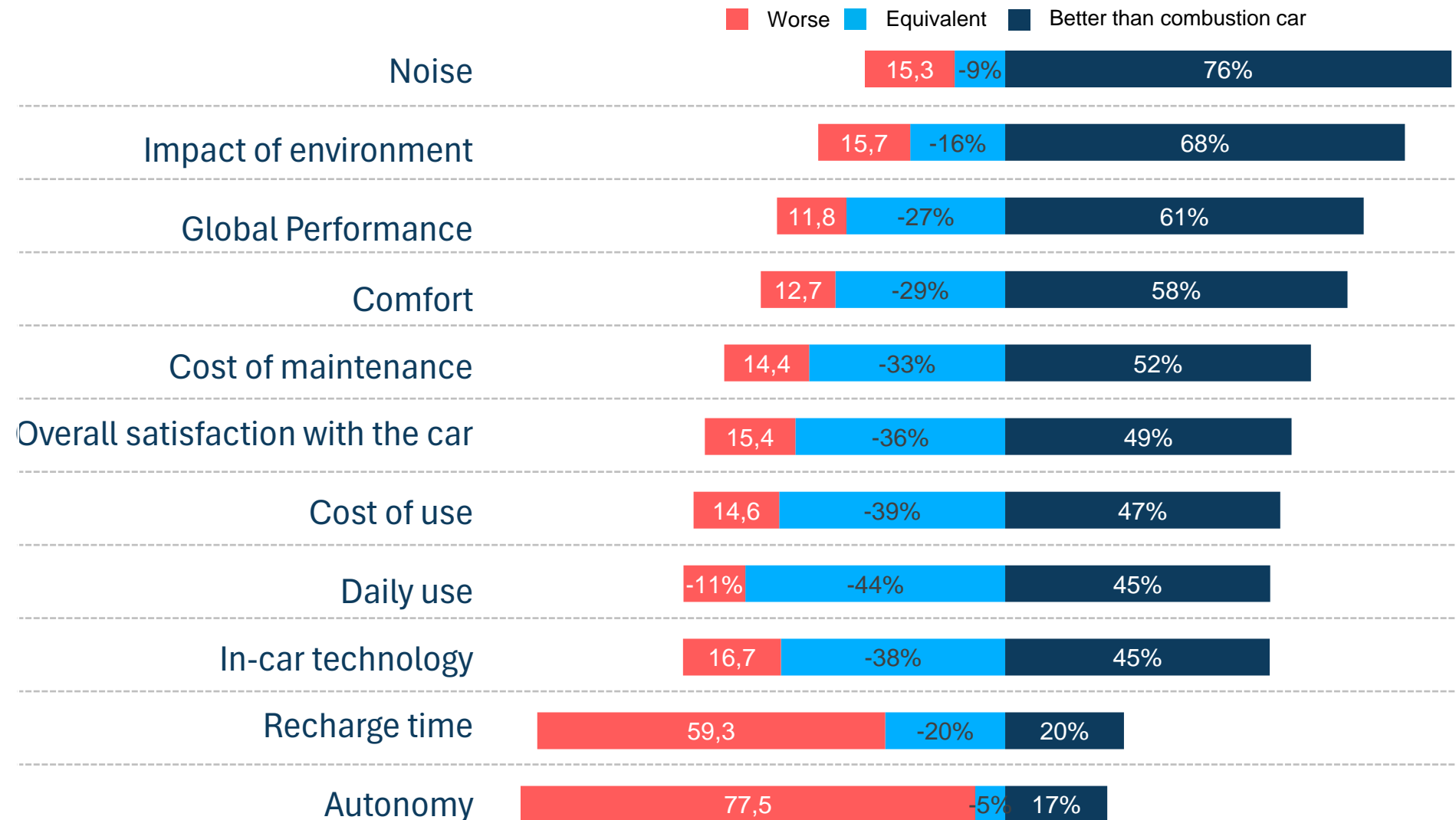


Q: Est-ce que ce serait de nouveau un véhicule électrique ?

Fleet



Comparison between EV and combustion vehicle : except the recharge time & autonomy, for every items EV is better evaluated than combustion vehicle



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