

Arval Mobility  
Observatory

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**MOBILITY AND FLEET BAROMETER 2021**

**KANTAR**

# 2021 MOBILITY AND FLEET BAROMETER

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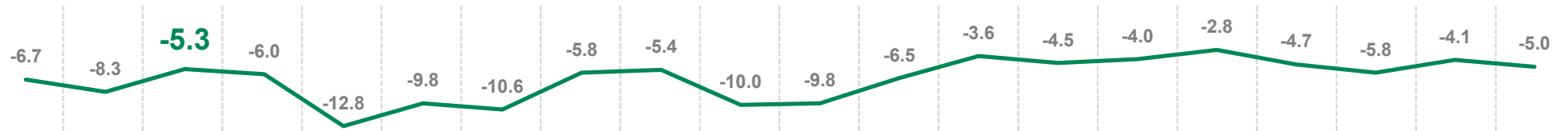
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# CONTEXT AND METHODOLOGY

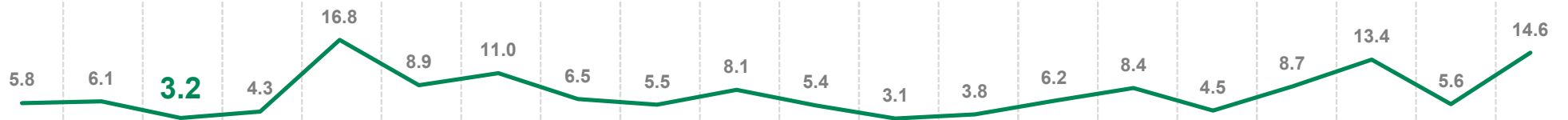


# GLOBAL ECONOMIC CONTEXT PER COUNTRY

GDP growth in volume in 2020 (source IMF)



Unemployment rate (source IMF)



# KEY THEMES FOR ARVAL MOBILITY OBSERVATORY



1

WHAT SHORT TERM SHIFTS ARE SHAPING THE MARKET IN THE CONTEXT OF COVID-19 CRISIS?



2

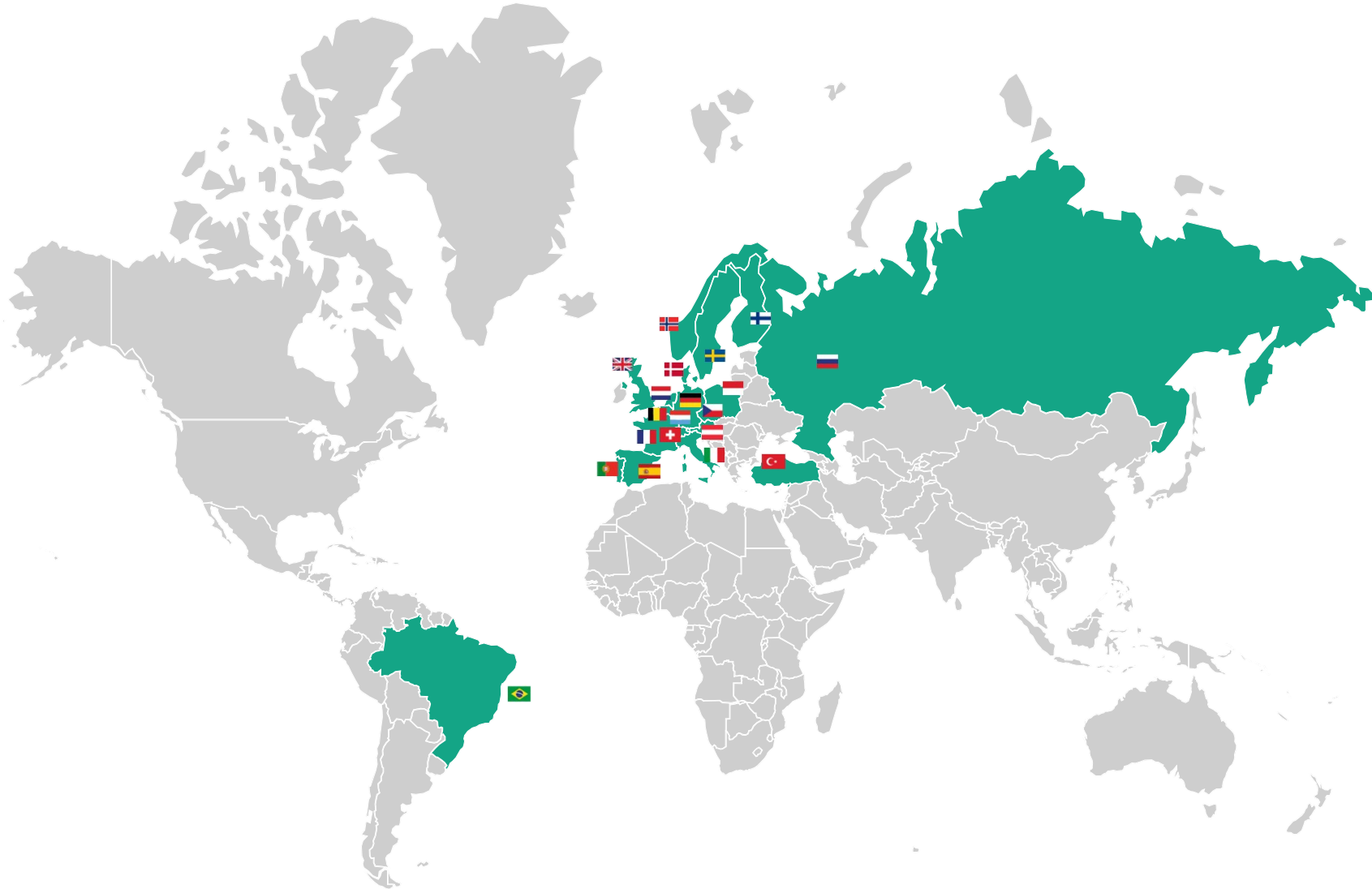
WHAT KIND OF VEHICLES WILL THE MARKET EXPECT IN 3 YEARS?



3

HOW WILL NEW MOBILITY SOLUTIONS AFFECT BUSINESS MODELS?

## PERIMETER OF THE SURVEY



# NUMBER OF INTERVIEWS CONDUCTED IN SWITZERLAND

Perimeter of the survey: companies **owning at least 1 vehicle**



Companies with less than 10 employees  
**83 INTERVIEWS**



Companies with 10 to 99 employees  
**50 INTERVIEWS**



Companies with 100 to 499 employees  
**67 INTERVIEWS**

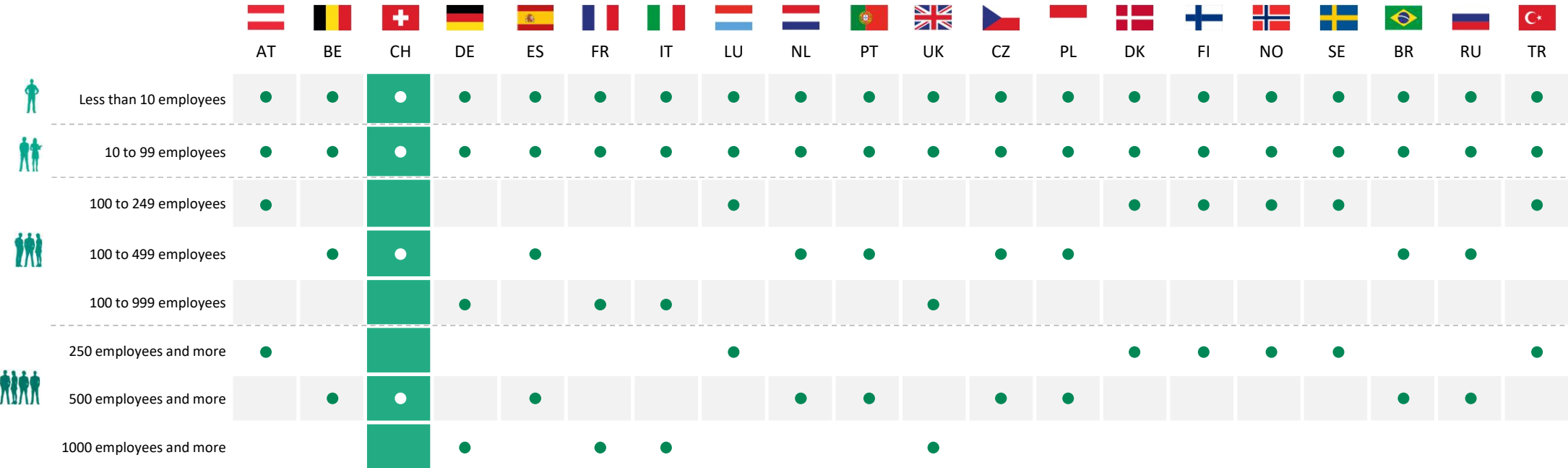


Companies with 500 employees and more  
**50 INTERVIEWS**

**1 to 99  
employees  
133 INTERVIEWS**

**100 employees  
and more  
117 INTERVIEWS**

# COMPANY SIZE SEGMENT DEFINITION





2

# EXECUTIVE SUMMARY



**GLOBAL COUNTRY INSIGHT: DRIVEN BY HEALTH SECURITY, ECONOMICAL AND ENVIRONMENTAL CONCERNS, COMPANIES ARE ACCELERATING THEIR TRANSFORMATION REGARDING MOBILITY & ENERGY MIX.**

**#1**

**CORPORATE FLEETS SHOW RESILIENCE WHILE MOBILITY OFFER IS ABOUT TO MOVE INTO A NEW PARADIGM.**

**#2**

**ALTERNATIVE TECHNOLOGIES ADOPTION IS ACCELERATING.**

**#3**

**STRONG GROWTH PERSPECTIVES FOR OPERATING LEASING IN THE COMING YEARS.**

# INSIGHT 1: SWISS CORPORATE FLEETS SHOW STRONG RESILIENCE TO COVID-19 CRISIS WHILE MOBILITY OFFER IS ABOUT TO MOVE INTO A NEW PARADIGM.

#1

## THE POST COVID-19 PERIOD SHOWS OPTIMISM AND GROWTH OF ALTERNATIVE MOBILITY SOLUTIONS.

- The COVID-19 pandemic badly affected the Swiss automobile market in 2020. 336 841 motor vehicles were newly registered nationwide. This was the lowest number for 24 years and a decline of 17.8% in comparison with 2019.
- Despite the difficult context, the Swiss corporate fleet shows strong resilience (43 vehicles on average per company)
- Furthermore, forecast remains positive: more than 1 manager out of 2 plan an increase in fleet size, but mostly in large companies.
- Generally, the health context has urged fleet managers to rethink (certainly faster than expected) their mobility offer with alternative solutions that guarantee safer transport conditions to employees, while still looking for eco-friendly solutions.
- Hence, mobility budget (34%, +15 pts), corporate car sharing (31%, +14pts) or private lease (25%, + 11 pts) have significantly increased this year.
- But beyond the specific health context, it is all the mobility offer that is currently questioned. Indeed:
  - Ride sharing, public transport may be the future winning mix in flexible mobility solutions, in a context where 65% of companies seem ready to favor homeworking.
  - Mobility budget will develop, supporting this need of variety in mobility options.
  - 5 to 6 fleet managers out of 10 even expect that their company car drivers will exchange all or part of their company car benefit for such alternatives in the future.

## INSIGHT 2: ALTERNATIVE TECHNOLOGIES ADOPTION IS ACCELERATING.

#2

### THE PANDEMIC COMBINED WITH GROWING ENVIRONMENTAL CONSIDERATIONS BOTH RAISE THE QUESTION ABOUT THE ENERGY MIX FUTURE.

- Nowadays, fleet managers have to deal with 3 concerns: **how to reach the budget balance while, at the same time, meeting their company's CSR commitments and keeping the employees happy?**
- **The use of alternative technologies** (such as HEV, PHEV and BEV) could be **an answer** to the budget balance and the CSR objectives, as:
  - Regarding budget balance:
    - It benefits from tax incentives and it helps reducing fuel expenses.
    - It is more and more accessible in terms of price, models and charging points (constraints about BEV have dropped when it comes to price/models/charging points limitation).
  - Regarding CSR: it is highly expected that companies reduce their carbon footprint as more and more people now aim at supporting socially responsible & environmental-friendly brands (a trend that is reinforced

with the COVID-19 crisis). In this context, zero emission cars are key to contribute to the corporate image.

- Therefore, 72% of companies already use these technologies or intend to do in the future (96% among very large companies). And overall, fleet managers even expect that more than 4 vehicles out of 10 to be a BEV one in the next years.

An increase confirmed by the growth of newly registered electric cars (49.8%) and plug-in hybrids (+225.7%) in 2020.

- **Connected vehicles could also help reaching the budget balance**, as it contributes to reduce the fleet costs according to 1 fleet manager out of 2 (for instance, by optimizing the battery charge management). However, if large companies are broadly using them, the smallest companies still need to be convinced.
- Besides, connected vehicles are becoming more essential as they also facilitate the management of the corporate car sharing that is developing this year in the COVID-19 context.

## INSIGHT 3: STRONG GROWTH PERSPECTIVES FOR OPERATING LEASING IN THE COMING YEARS.

#3

### HOW TO FINANCE THESE INCREASINGLY GREEN FLEETS?

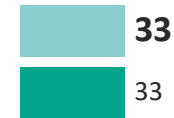
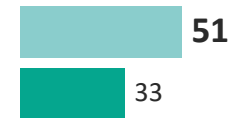
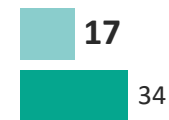
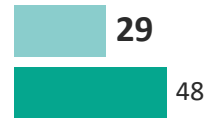
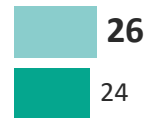
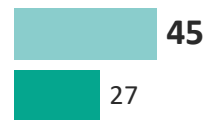
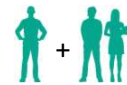
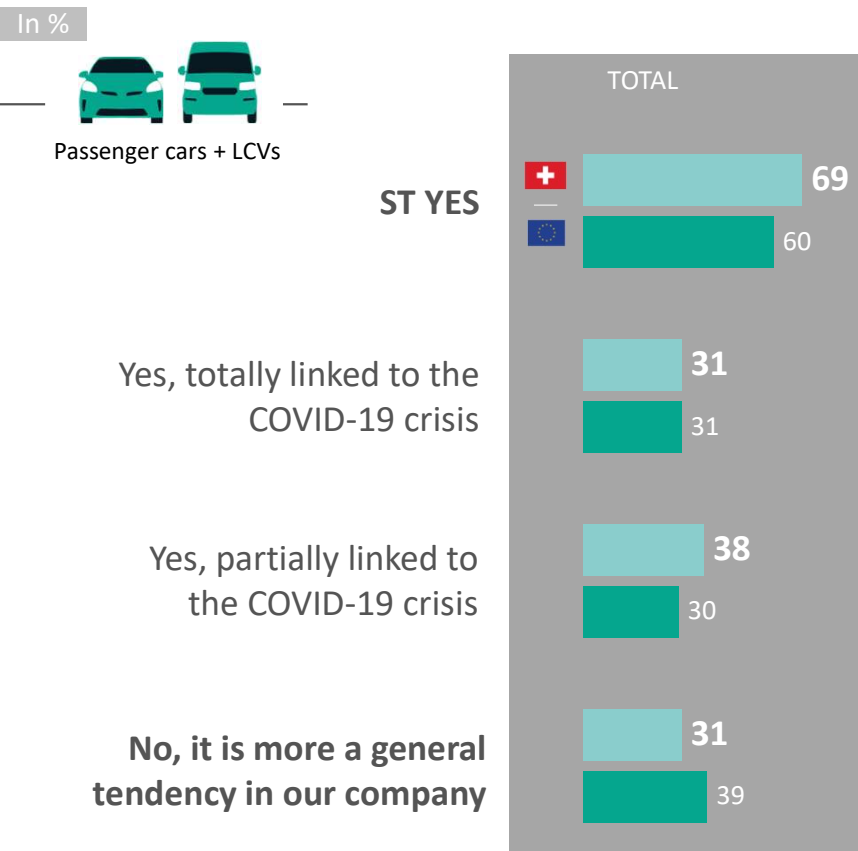
- **Financing methods are quite homogeneous on the Swiss corporate market:**
  - Among SMEs (up to 100 employees), more than half of the respondents still prefer self purchase, while 1 out of 4 would choose financial leasing. Operating leasing is progressing (12%, +8pts) but remains low, so is car credit (6%).
  - Among larger companies (100 employees and more), self purchase is losing ground (45%, -16pts). Financial leasing is consolidating its 2<sup>nd</sup> position at 33%. Operating leasing and car credit are progressing (15% and 7%).
- **Operating leasing confirms its potential**, with 26% of companies (essentially large ones) who certainly intend to use this financing method in the future.

3

# WHAT ARE THE MAIN CHARACTERISTICS OF THE FLEETS?

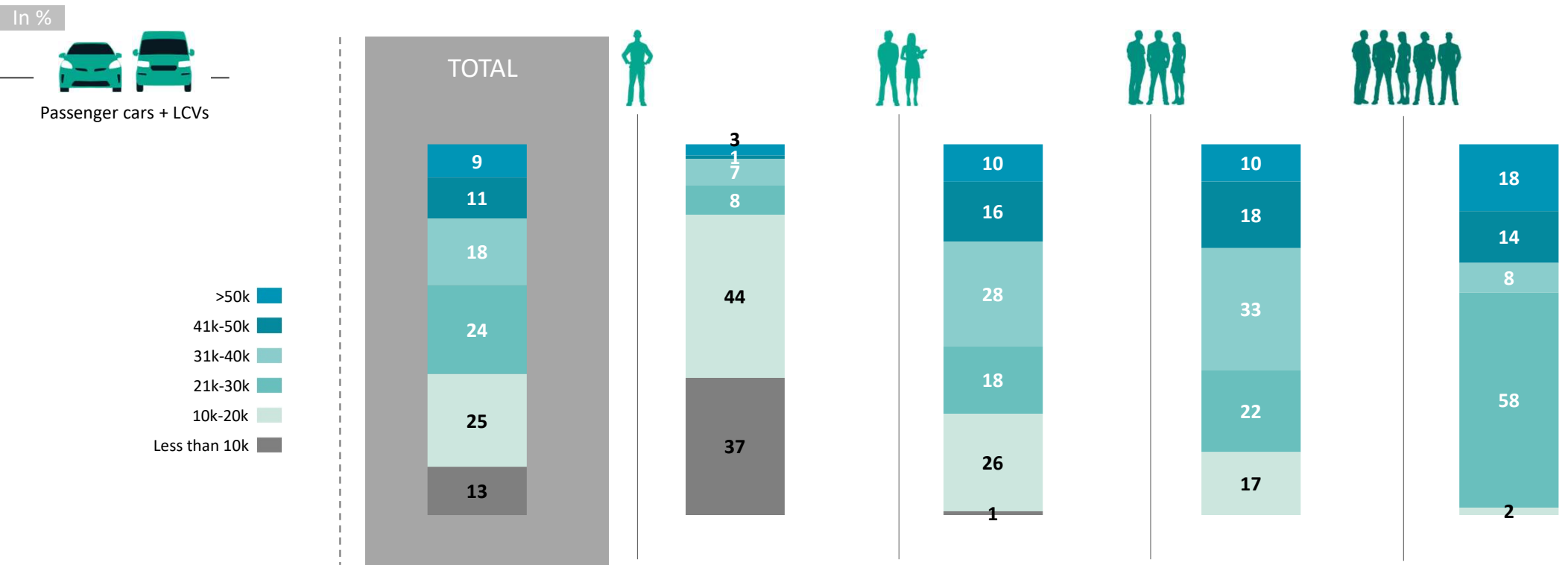


# IMPACT OF THE COVID-19 CRISIS ON THE FLEET SIZE



Is the evolution of the total number of vehicles in your company directly linked to the COVID-19 crisis?  
Basis: companies expecting an increase or a decrease of the fleet

# AVERAGE ANNUAL MILEAGE PER VEHICLE



What is the average annual mileage per vehicle in your fleet?  
 Basis: Companies with corporate vehicles = 100%



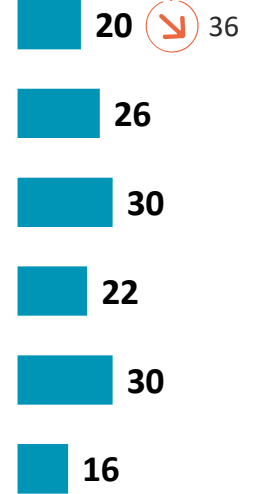
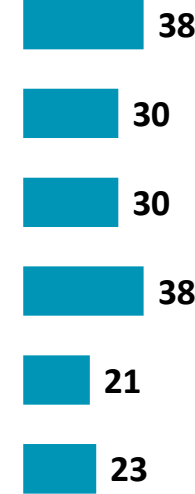
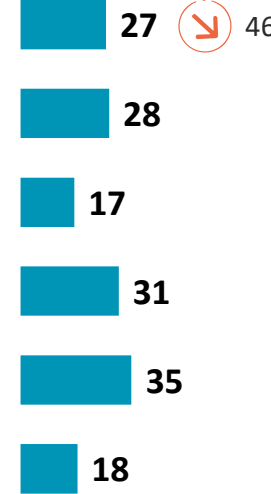
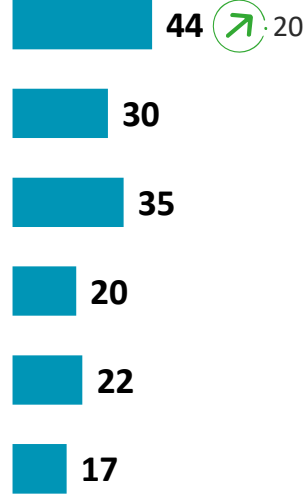
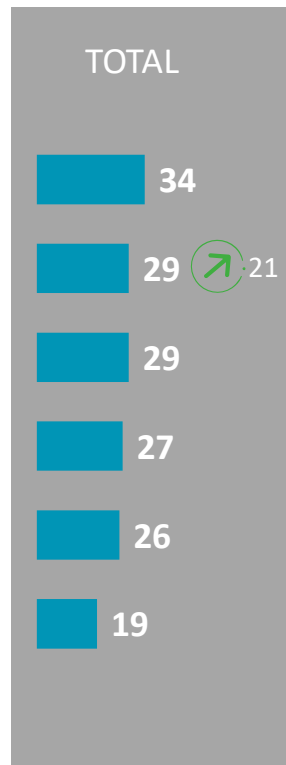
# MAIN CHALLENGES FOR FLEETS IN THE NEXT FIVE YEARS

In %



Passenger cars + LCVs

- Increased vehicle taxation
- Unclear Government policy towards transport
- Introduction of more clean air zones in urban areas
- Implementation of suitable alternative fuel technologies
- Lack of road infrastructure causing increased congestion
- Increased driver personal taxation



What do you see are the main challenges facing fleets in the next 5 years...?  
Basis: Companies with corporate vehicles = 100%

4

## WHAT CHANGES ARE TO BE EXPECTED IN THE NEAR FUTURE REGARDING ENERGY MIX?



# ALTERNATIVE TECHNOLOGIES ADOPTION IS ACCELERATING. LARGE COMPANIES ARE LEADING THE WAY.

1

- Consistent with the European trend, **both usages and future intentions for alternative technologies keep progressing, whichever technology considered.**

Compared to 2020, HEV, PHEV and BEV are improving at the same pace, displaying usage & consideration scores in line with the rest of Europe:

- 7 companies out of 10 are already equipped with HEV, PHEV or BEV or plan to do in the next years.
- In the next 3 years, fleet managers even expect 4 vehicles out of 10 to be a BEV.

2

- Regarding company size, although more than **100 employees' companies are leading the way for further alternative energies adoption in 2021, smaller companies are also considering it in the future**, but equipment intention rates are twice as low.

3

- Apart from environmental considerations, this huge development of alternative technologies mainly relies on:
  - **Anticipation of future restrictive public policies** (1<sup>st</sup> reason for passenger car, 3<sup>rd</sup> for LCVs).
  - **Opportunities of savings**, including reduced fuel expenses (1<sup>st</sup> motivation for LCVs) and tax incentives.
  - **Environmental impact, corporate image and CSR considerations.**

4

- In parallel, **alternative technologies usage is also progressing due to lower barriers** than last year notably regarding **charging points, price and range of models**. Yet, 5 companies out of 10 still have no charging points installed in their premises, mostly because they use public charging points. In particular, less than 10 employees' companies are barely equipped with charging points in their premises.

# ENERGY MIX



AT LEAST ONE ALTERNATIVE  
IMPLEMENTED OR CONSIDERED

72%



73%



AT LEAST ONE ALTERNATIVE  
IMPLEMENTED

43%



42%



EXPECTED PART OF 100%  
ELECTRIC PASSENGER CAR IN 3 YEARS

42%



35%



EXPECTED PART OF 100%  
ELECTRIC LCV IN 3 YEARS

40%



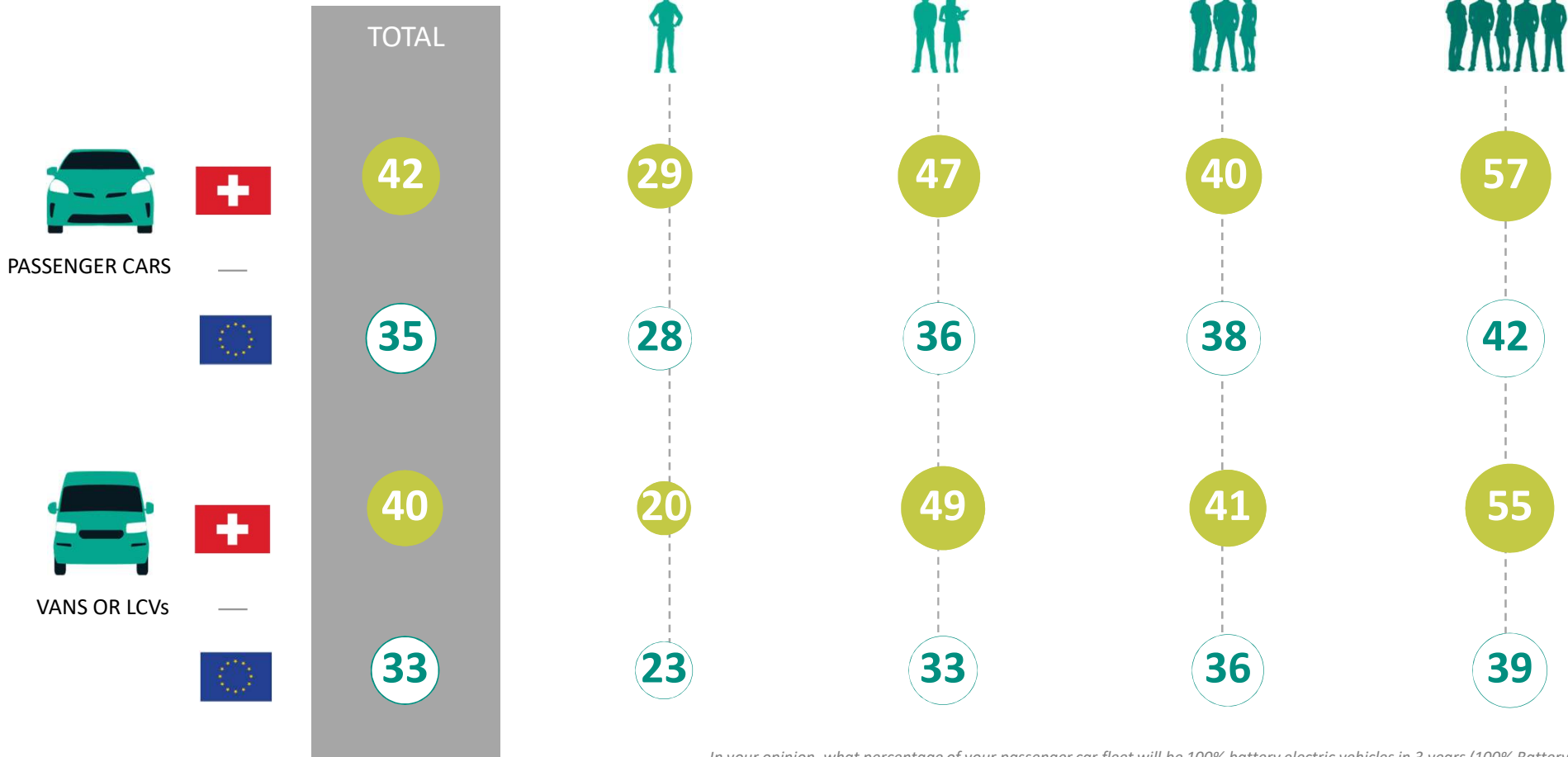
33%



LIST OF ALTERNATIVE ENERGIES:  
-Hybrid                   -100% Battery Electric Vehicle  
-Plug-in Hybrid

# EXPECTED SHARE OF 100% BATTERY ELECTRIC VEHICLES (NEXT 3 YEARS)

In %



*In your opinion, what percentage of your passenger car fleet will be 100% battery electric vehicles in 3 years (100% Battery Electric Vehicle)?  
 In your opinion, what percentage of your light commercial vehicle fleet will be 100% battery electric vehicles in 3 years (100 % Battery Electric Vehicle)?  
 Basis: companies with passenger cars / companies with LCVs*

# CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

At least one technology

In %



Passenger cars + LCVs

## HOW TO READ THE RESULTS?

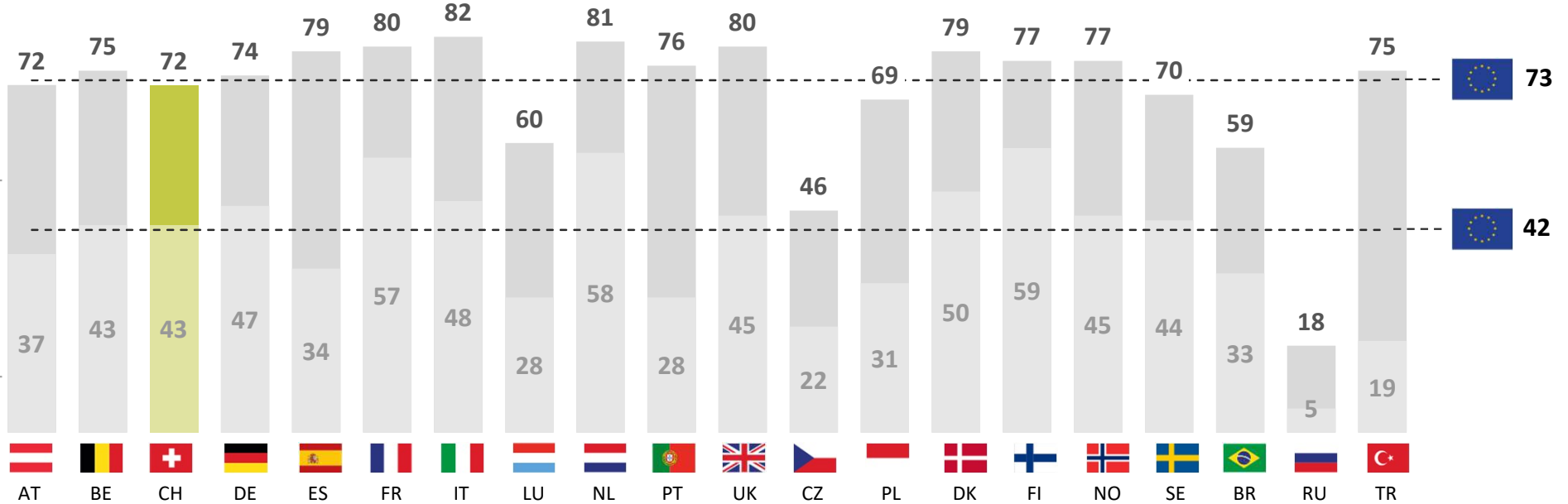
In Switzerland, 72% of the companies have already implemented or consider to implement at least one alternative technology in the next 3 years. 43% have already implemented at least one.



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



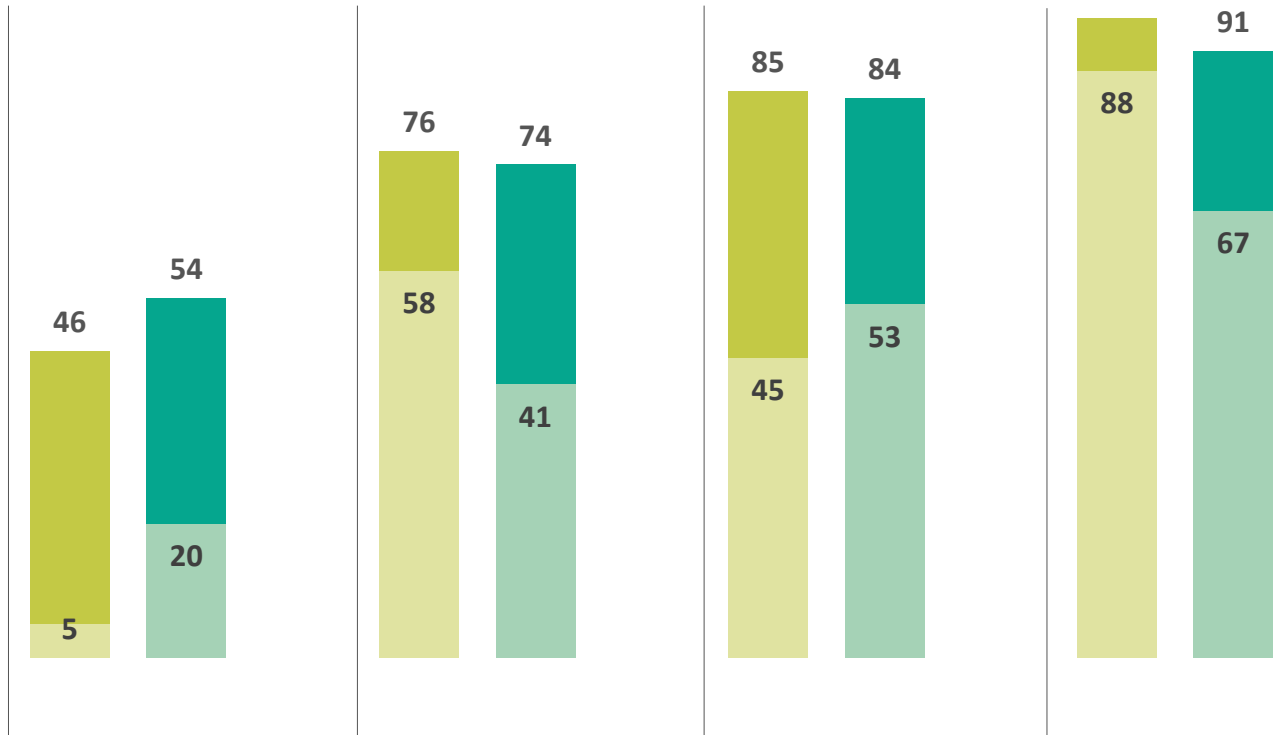
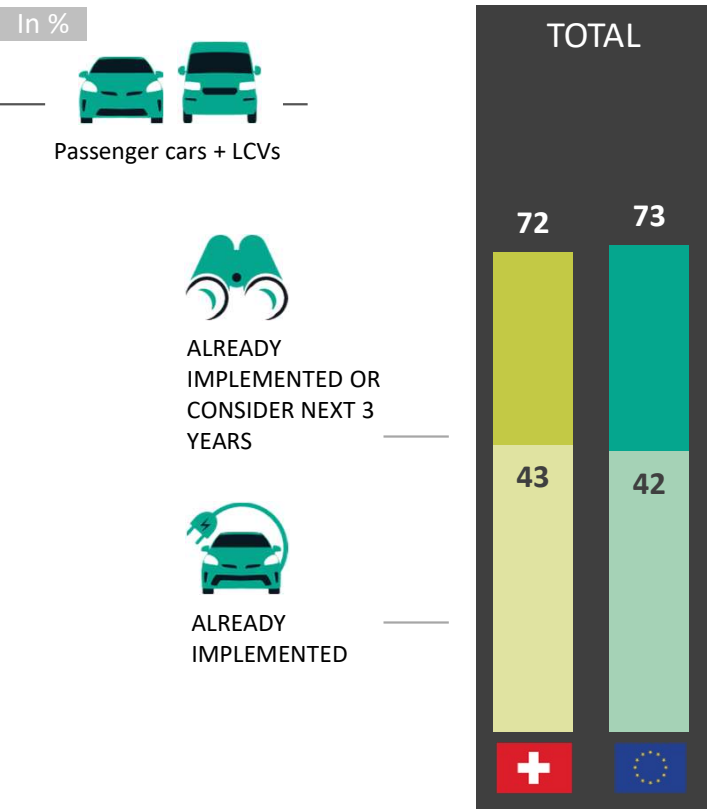
ALREADY IMPLEMENTED



Amongst the following alternative fuel technologies, which ones do you use or are you considering using...?  
 Response scale: Already implemented, considered in the next 3 years, considered but later, not interested  
 Basis: companies with corporate vehicles = 100%

# CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

At least one technology

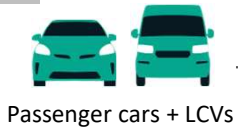


Amongst the following alternative fuel technologies, which ones do you use or are you considering using...?  
 Response scale: Already implemented, considered in the next 3 years, considered but later, not interested  
 Basis: companies with corporate vehicles = 100%

# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years

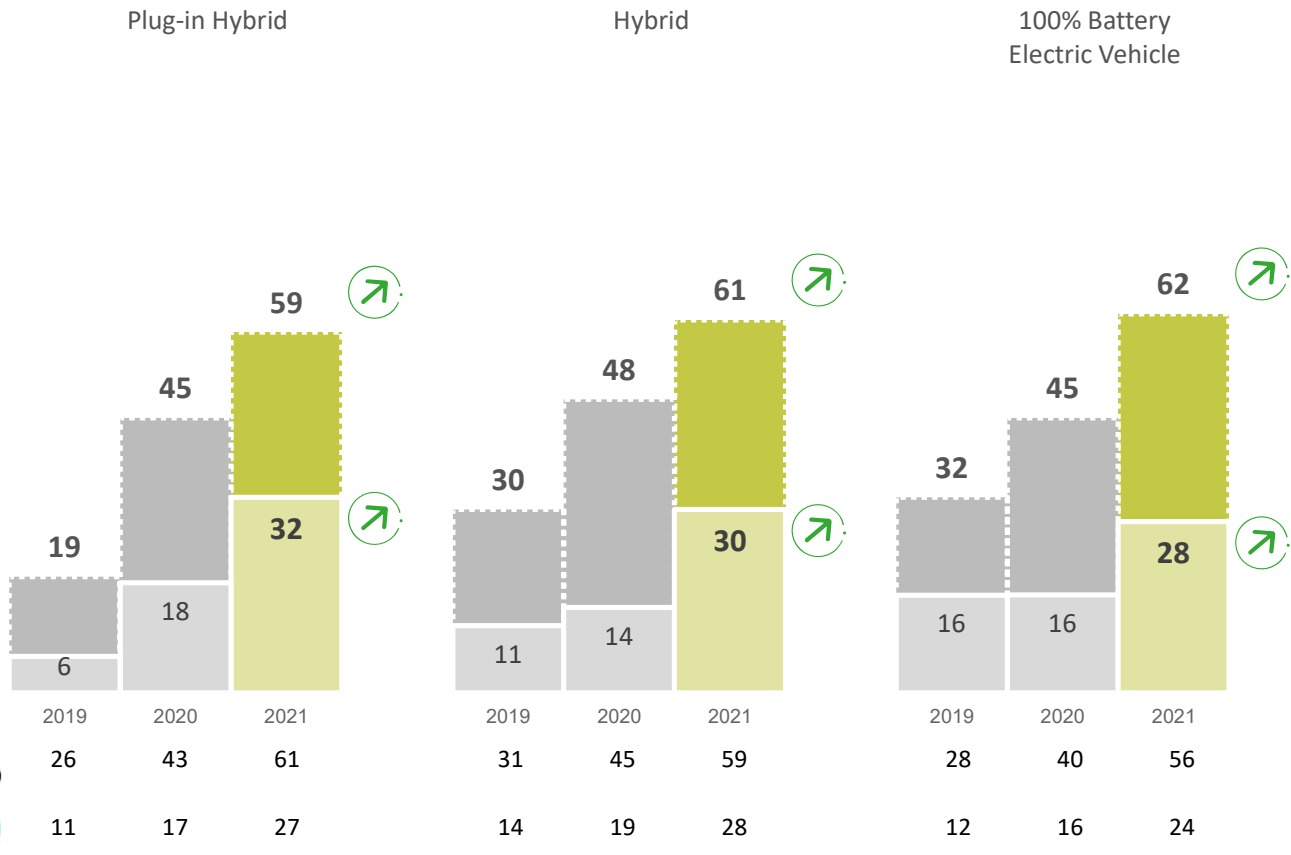
In %



ALREADY  
IMPLEMENTED OR  
CONSIDER NEXT 3  
YEARS



ALREADY  
IMPLEMENTED



Amongst the following alternative fuel technologies, which ones do you use or are you considering using...?  
 Response scale: Already implemented, considered in the next 3 years, considered but later, not interested  
 Basis: companies with corporate vehicles



# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

## Passenger car fleet

In %



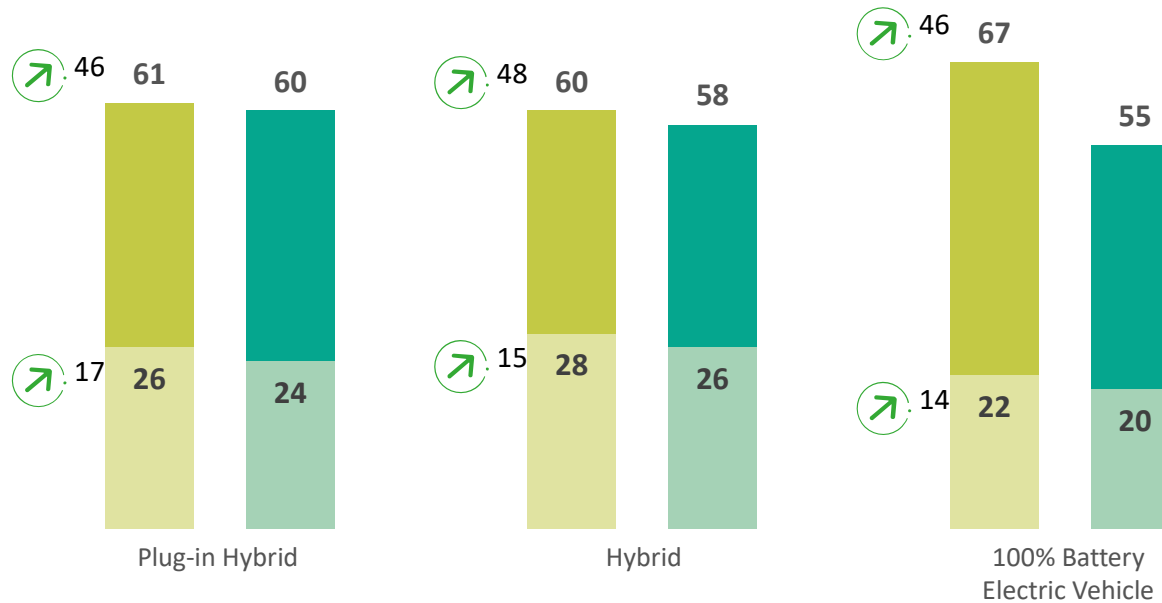
Passenger cars



ALREADY  
IMPLEMENTED OR  
CONSIDER NEXT 3  
YEARS



ALREADY  
IMPLEMENTED



Amongst the following alternative fuel technologies, which ones do you use or are you considering using...?  
Response scale: Already implemented, considered in the next 3 years, considered but later, not interested  
Basis: companies with corporate passenger cars

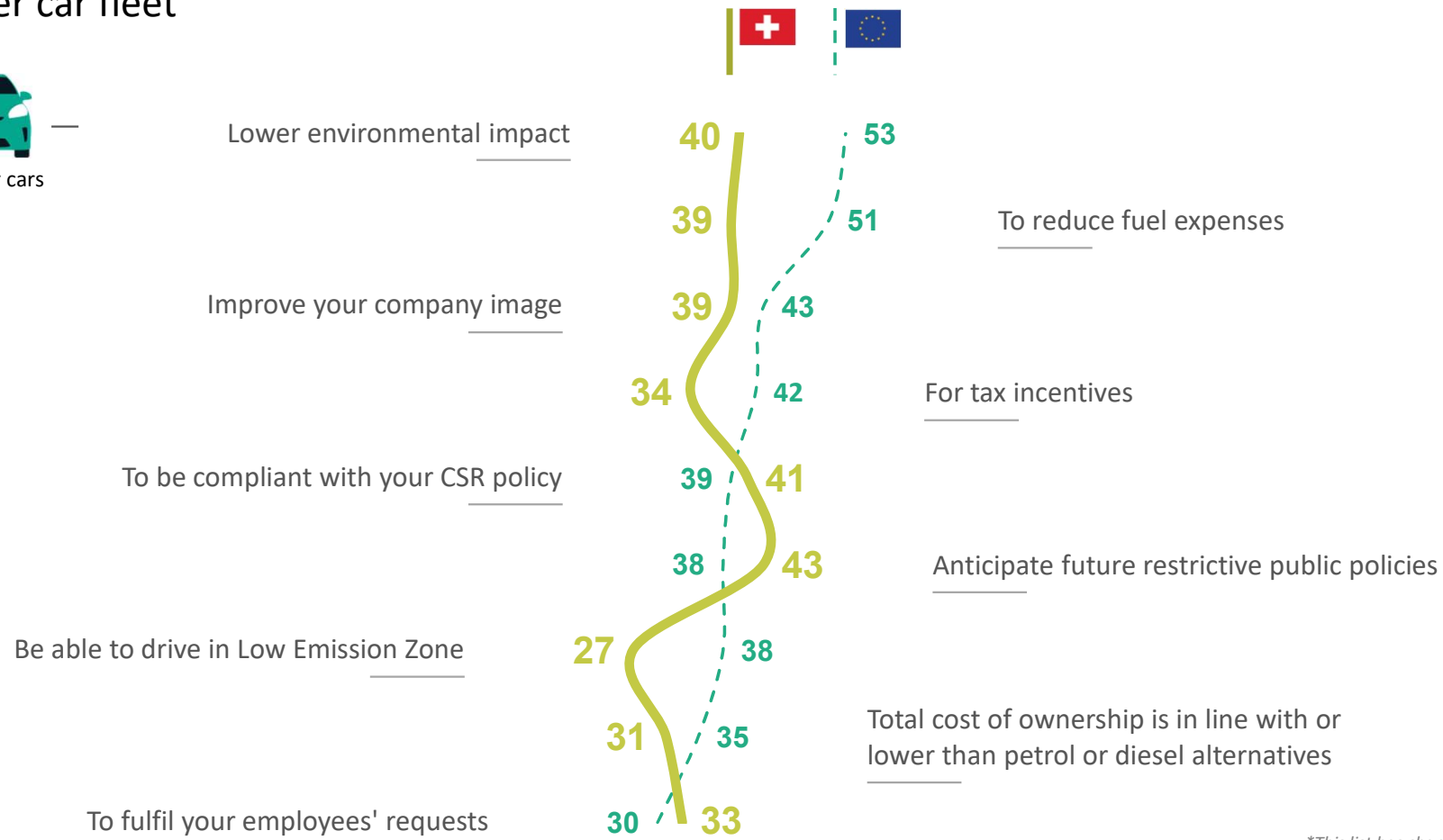
# REASONS FOR IMPLEMENTING OR CONSIDERING ALTERNATIVE FUEL TECHNOLOGIES

## Passenger car fleet

In %



Passenger cars



*\*This list has changed, no comparison vs previous year*

*Why have you already implemented or why do you consider implementing alternative fuel technologies?  
Basis: companies having implemented or considering Hybrid, Plug-in Hybrid or Electric passenger cars*

# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

## LCV Fleet

In %



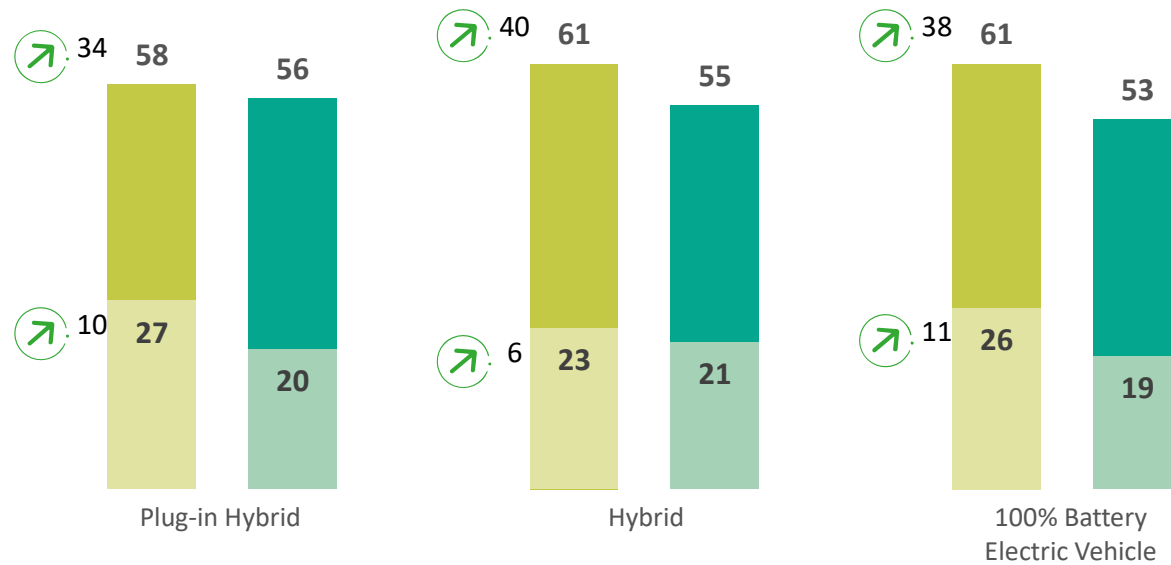
LCVs



ALREADY  
IMPLEMENTED OR  
CONSIDER NEXT 3  
YEARS



ALREADY  
IMPLEMENTED



Amongst the following alternative fuel technologies, which ones do you use or are you considering using...?  
Response scale: Already implemented, considered in the next 3 years, considered but later, not interested  
Basis: companies with corporate LCVs

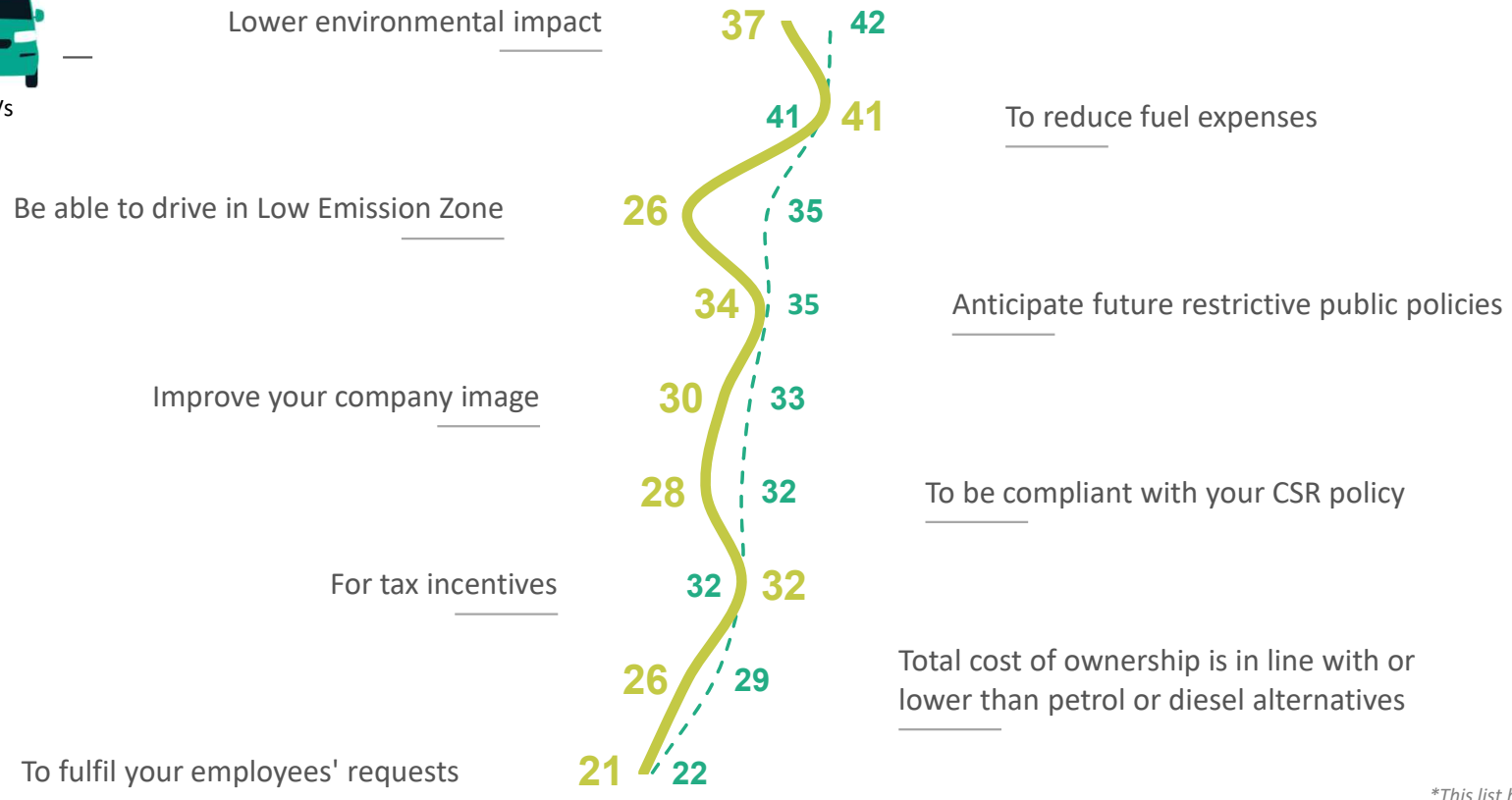
# REASONS FOR IMPLEMENTING OR CONSIDERING ALTERNATIVE FUEL TECHNOLOGIES

## LCV fleet

In %



LCVs



*\*This list has changed, no comparison vs previous year*

*Why have you already implemented or why do you consider implementing alternative fuel technologies?  
Basis: companies having implemented or considering Hybrid, Plug-in Hybrid or Electric LCVs*

4

# ENERGY MIX FOCUS PER ALTERNATIVE TECHNOLOGY



# HYBRID IMPLEMENTATION

In %



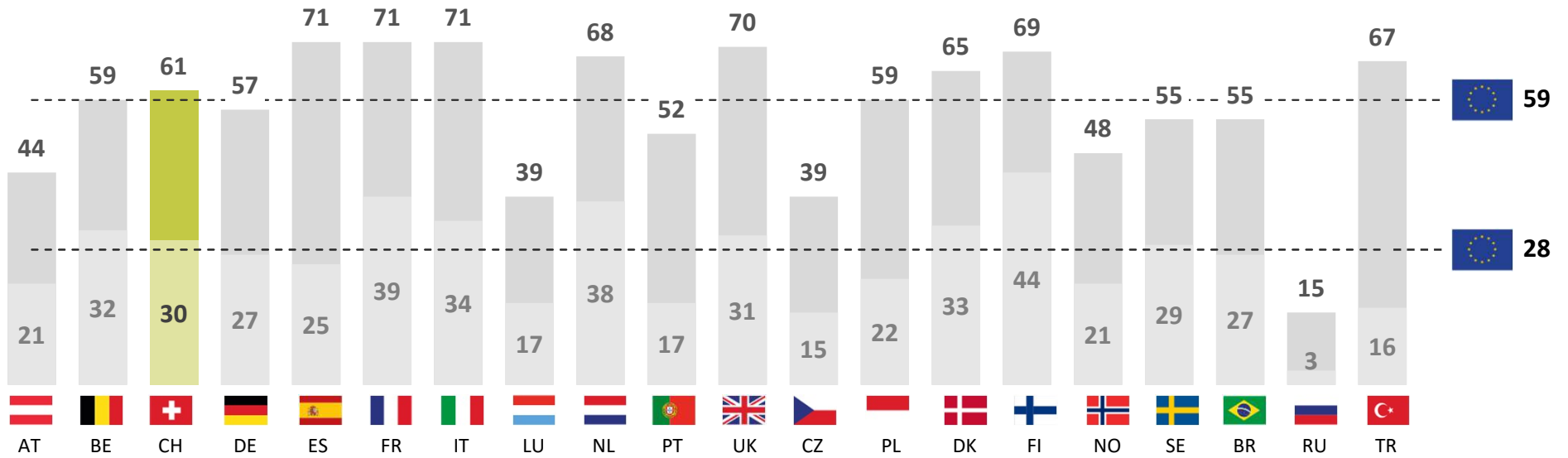
Passenger cars + LCVs



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS

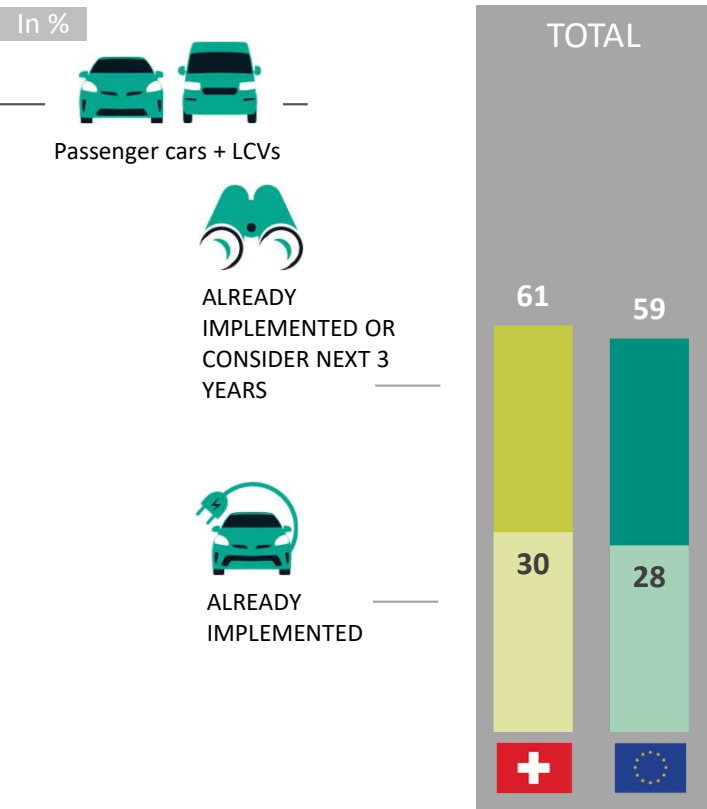


ALREADY IMPLEMENTED



Amongst the following alternative fuel technologies, which ones do you use or are you considering using...?  
 Response scale: Already implemented, considered in the next 3 years, considered but later, not interested  
 Basis: companies with corporate vehicles = 100%

# HYBRID IMPLEMENTATION



Amongst the following alternative fuel technologies, which ones do you use or are you considering using...?  
 Response scale: Already implemented, considered in the next 3 years, considered but later, not interested  
 Basis: companies with corporate vehicles = 100%

# PLUG-IN HYBRID IMPLEMENTATION

In %



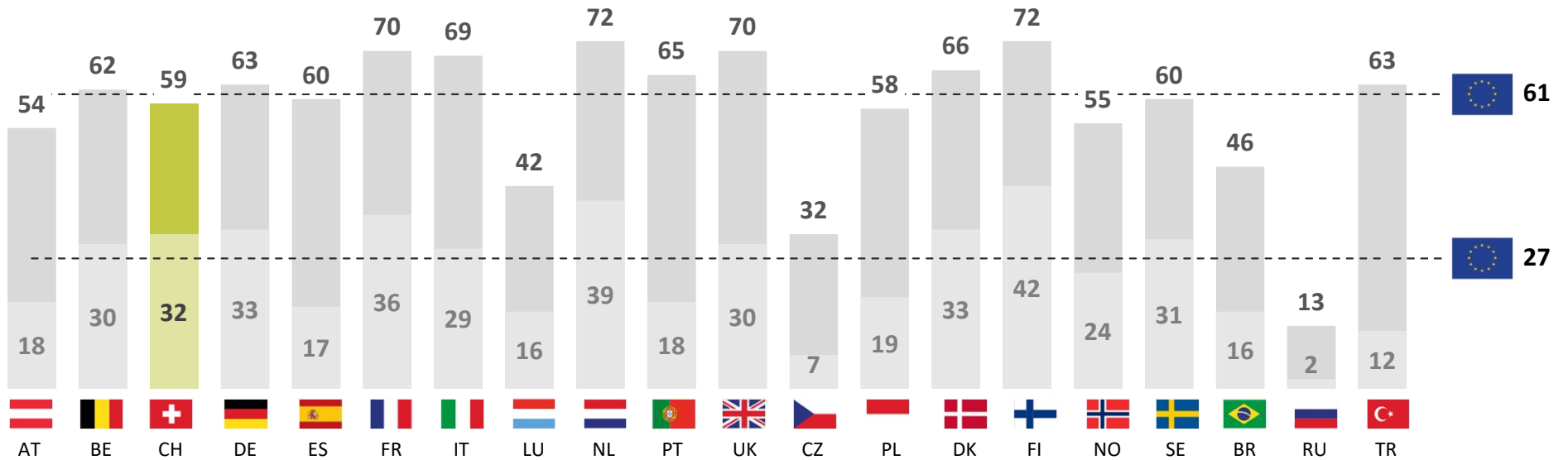
Passenger cars + LCVs



ALREADY IMPLEMENTED OR CONSIDERED NEXT 3 YEARS



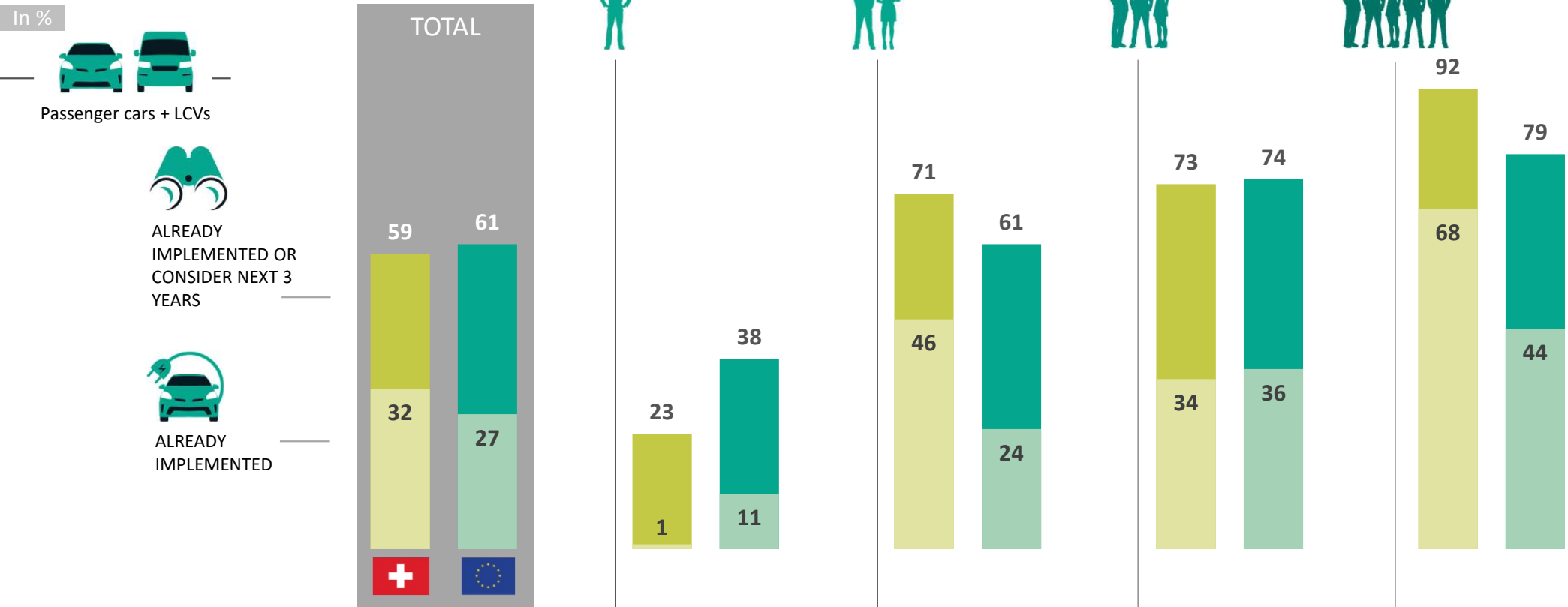
ALREADY IMPLEMENTED



Amongst the following alternative fuel technologies, which ones do you use or are you considering using...?  
 Response scale: Already implemented, considered in the next 3 years, considered but later, not interested  
 Basis: companies with corporate vehicles = 100%



# PLUG-IN HYBRID IMPLEMENTATION



Amongst the following alternative fuel technologies, which ones do you use or are you considering using...?  
 Response scale: Already implemented, considered in the next 3 years, considered but later, not interested  
 Basis: companies with corporate vehicles = 100%

# 100% BATTERY ELECTRIC IMPLEMENTATION

In %



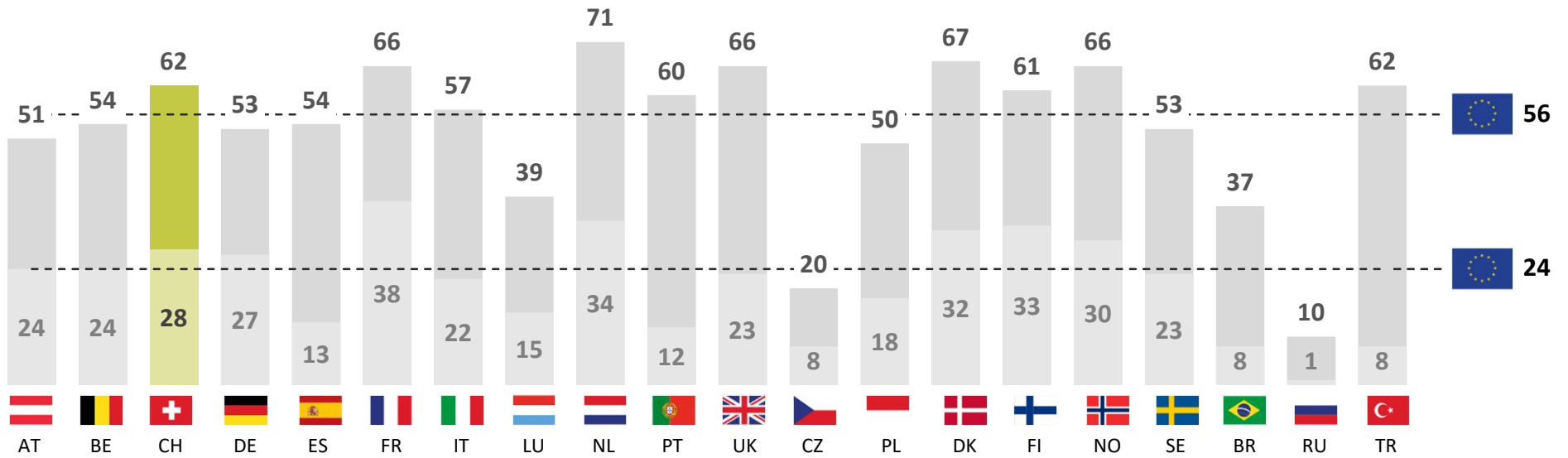
Passenger cars + LCVs



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS

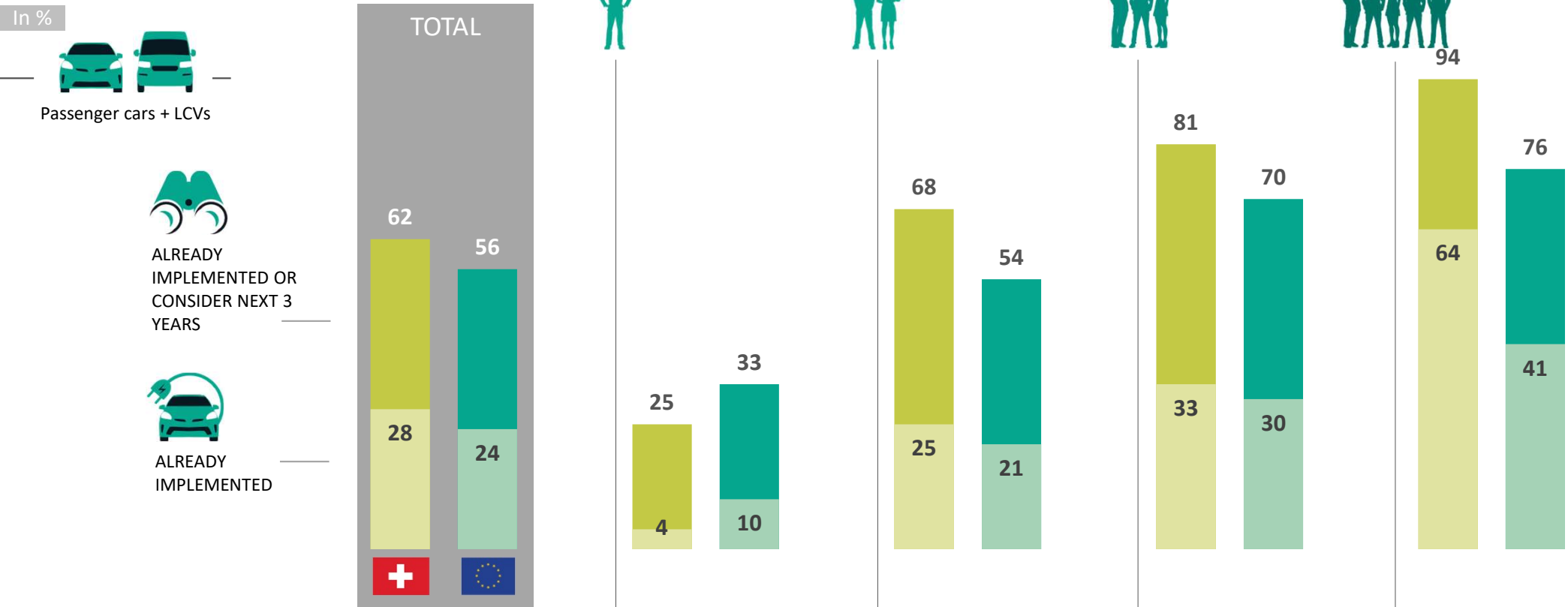


ALREADY IMPLEMENTED



Amongst the following alternative fuel technologies, which ones do you use or are you considering using...?  
Response scale: Already implemented, considered in the next 3 years, considered but later, not interested  
Basis: companies with corporate vehicles = 100%

# 100% BATTERY ELECTRIC IMPLEMENTATION



Amongst the following alternative fuel technologies, which ones do you use or are you considering using...?  
 Response scale: Already implemented, considered in the next 3 years, considered but later, not interested  
 Basis: companies with corporate vehicles = 100%

# CONSTRAINTS OF 100% BATTERY ELECTRIC IMPLEMENTATION

In %



Passenger cars + LCVs

do not consider implementing battery electric vehicles

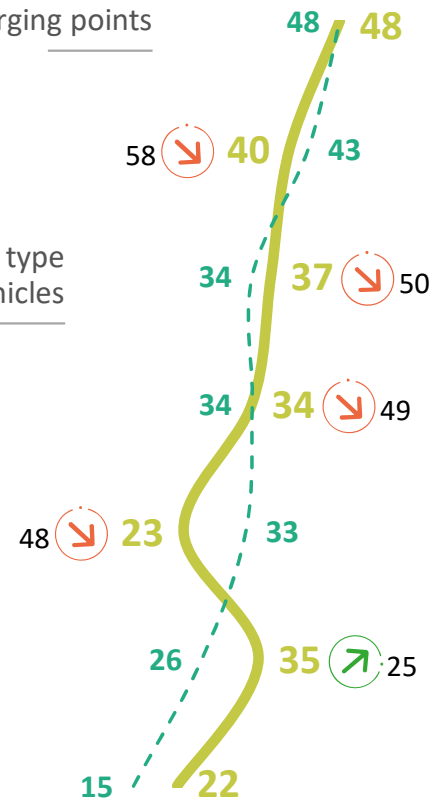
11

The number of public charging points

The range of models is limited for this type of vehicles

No charging points at your company offices

Your employee's reluctance to drive such vehicles



The purchase price is higher than a regular fuel car

No charging solutions at your employees' home

The questions raised on their reliability

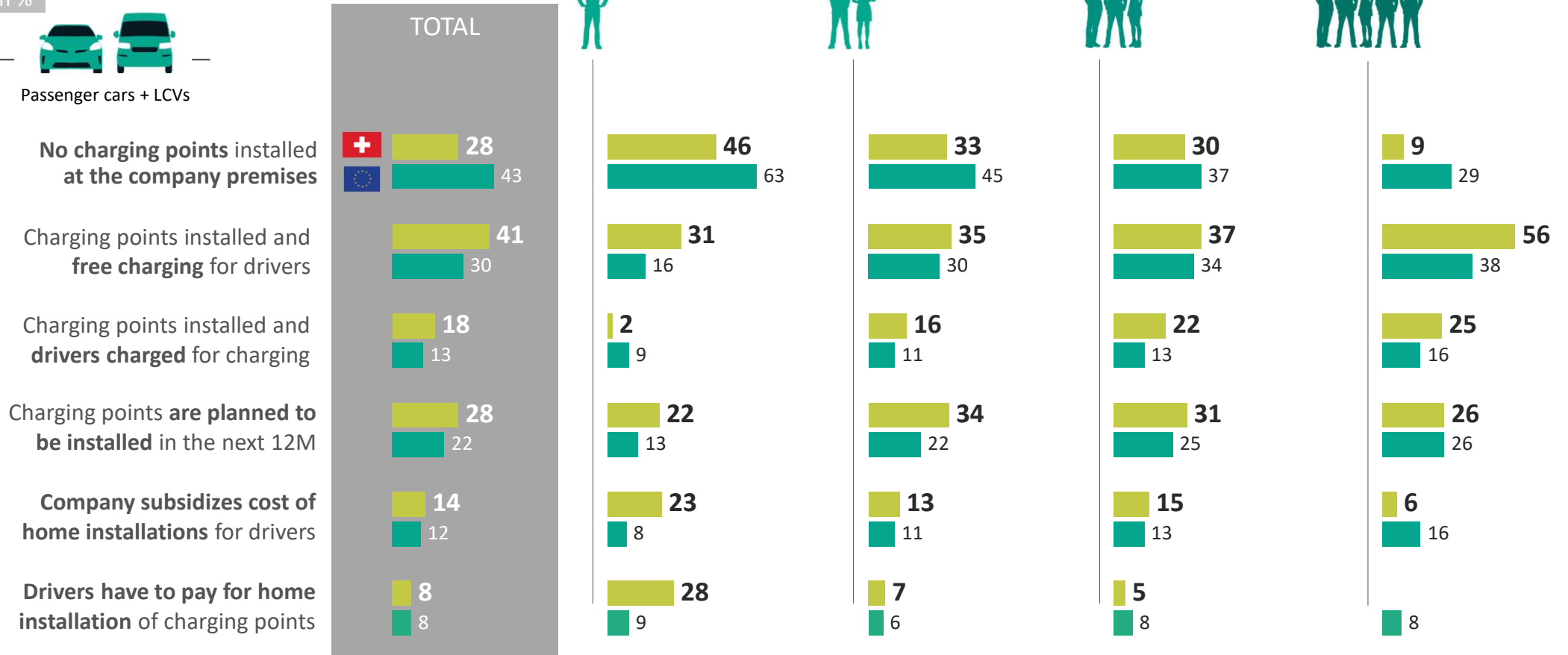
What are the constraints of using 100% Battery Electric vehicles?  
Basis: companies not considering 100% battery electric vehicles

# INSTALLATION OF CHARGING POINTS

In %



Passenger cars + LCVs



Multiple answers - % don't add up to 100%

In terms of charging point installation and responsibility for the cost of charging for battery electric and plug-in hybrid vehicles in your company...?  
Basis: companies already using or considering Plug-in hybrid and 100% electric vehicles

# INSTALLATION OF CHARGING POINTS IN THE COMPANY

93%

Of companies have already or consider implementing BEV or PHEV in their fleet

In %



Passenger cars + LCVs

You have already installed or are going to install charging points in your company's offices

You use public charging points

You don't plan to install charging points, because you use lump sum payments

Don't know



How do you manage the charging point solutions in your company?  
Basis: Have already implemented BEV/PHEV or considering to implement BEV/PHEV in their fleet

Multiple answer: % don't add up to 100%

# SUPPORT DRIVERS FOR THE INSTALLATION OF CHARGING POINTS

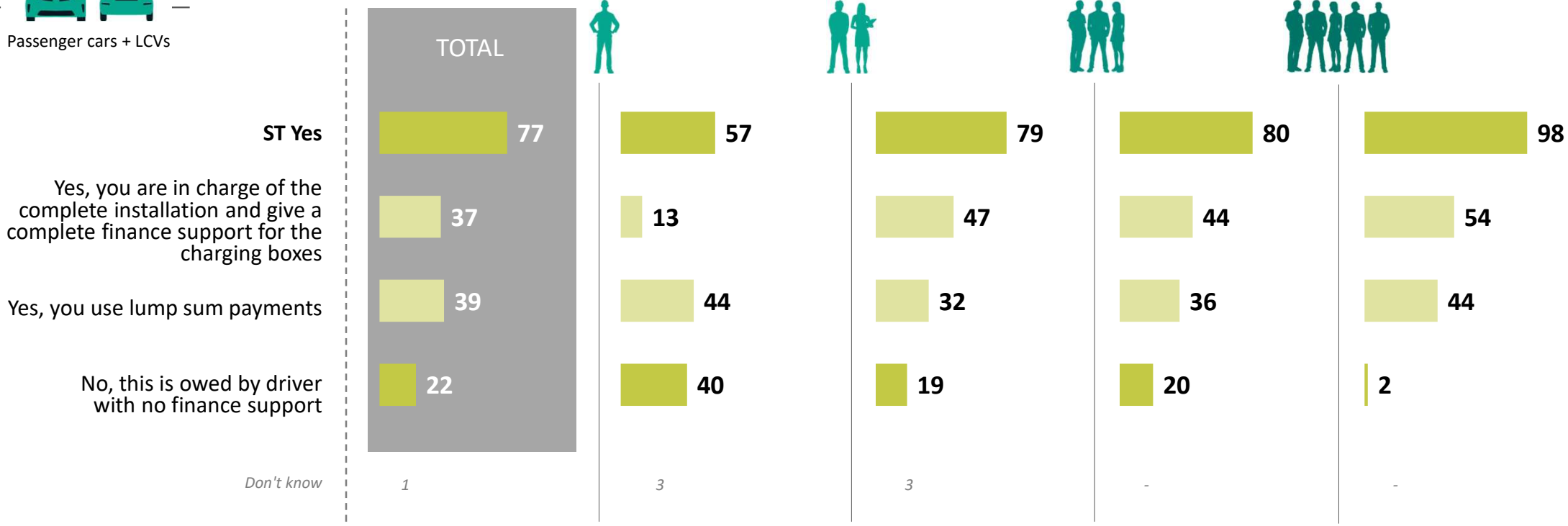
93%

Of companies have already or consider implementing BEV or PHEV in their fleet

In %



Passenger cars + LCVs



Do you support your drivers for charging points installation?  
Basis: Have already implemented BEV/PHEV or considering to implement BEV/PHEV in their fleet

5

# WHAT ARE THE PERSPECTIVES IN TERMS OF ALTERNATIVE MOBILITY SOLUTIONS?





## WITH ALTERNATIVE MOBILITY SOLUTIONS BECOMING THE NEW NORMAL, FLEXIBLE AND ENVIRONMENTAL-FRIENDLY SOLUTIONS MAY BE THE FUTURE WINNING MIX.

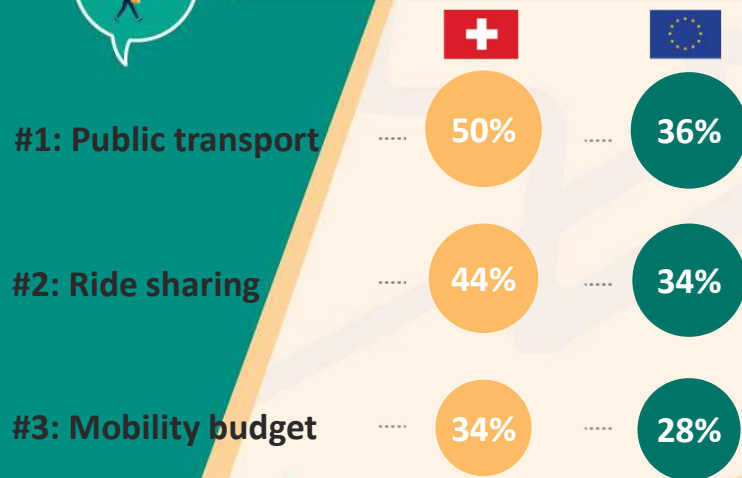
- 1 ● With 85% of companies having already implemented at least one solution, **alternative mobility has become the new normality.**
  - **Potential of development is mainly seen in smaller companies**, where nearly 3 out of 10 have no solution in place.
- 2 ● More than ever, the **crisis makes mobility a strategic topic on the short / mid-term.** In this context, **the use of alternative mobility solutions has developed for understandable reasons of health safety**, especially:
  - **Mobility budget (34%,+15 pts), corporate car sharing (31%, +14pts) or private lease (25%, + 11 pts)**, as a **response to the strong need for flexible** and more **individual** solutions in the fast-moving health context.
- 3 ● But beyond the specific health context, fleet managers also tend to project themselves out of the crisis, as they show an increasing interest for both individual and shared mobility solutions:
  - **Ride sharing (79% vs. 56% last year), public transport (77% vs. 59%)** may be the future winning mix in flexible mobility solutions, **in a context where 65% of companies seem ready to favor homeworking.**
    - As it will become essential to manage needs of flexibility regarding employees' mobility, **fleet manager will massively propose mobility budget (76% vs 35%)** in the future.

→ Lastly, fleet managers predict a bright future to these alternative solutions, as 5 to 6 out of 10 even expect that their company car drivers will replace all or part of their company car benefit for such alternatives in the coming years.

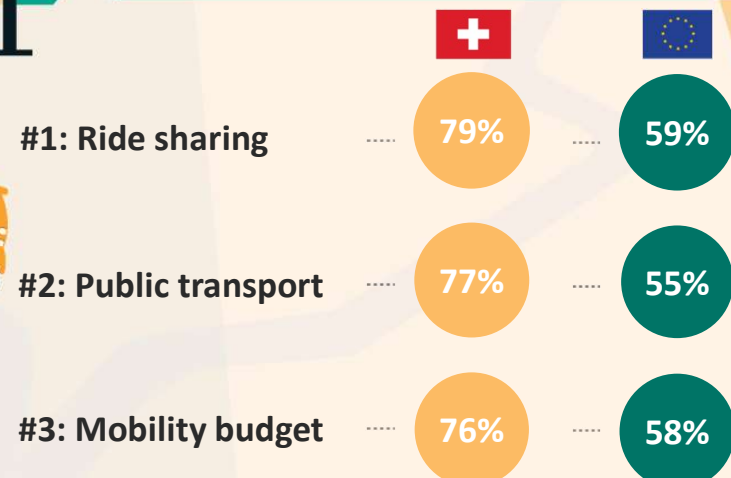
# ALTERNATIVE MOBILITY



## TOP 3 USED ALTERNATIVES



## TOP 3 POTENTIAL NEXT 3 YEARS



# MOBILITY ALTERNATIVES LIST AND DEFINITIONS



**CORPORATE CAR SHARING:** an employee can make a vehicle reservation via an external solution



**MOBILITY BUDGET:** predefined budget granted by the employer allowing employees to choose their mode of transport



**RIDE SHARING:** several employees travel in the same car to the same destination



**AN APP TO BOOK MOBILITY SOLUTIONS PROVIDED BY THE COMPANY**



**BIKE (OR OTHER TWO WHEELS) SHARING / BIKE (OR OTHER TWO WHEELS) LEASING:** solution provided by the company



**PRIVATE LEASE OR SALARY SACRIFICE:** private lease where an employee leases a car on his own behalf / salary sacrifice where an employee leases a car via their employer



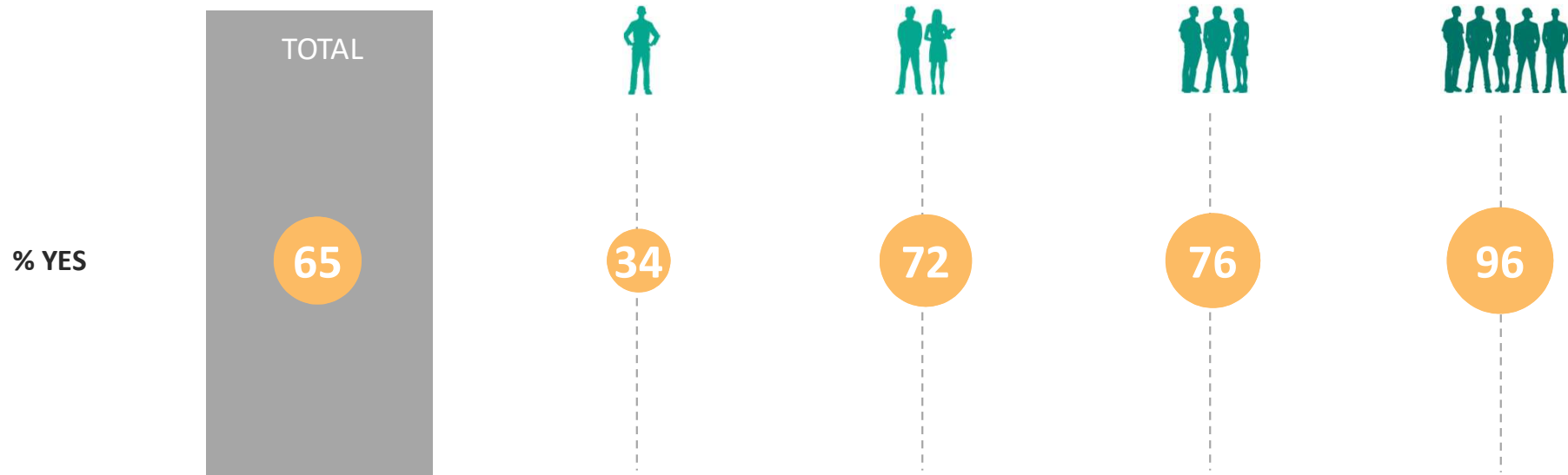
**PUBLIC TRANSPORT**



**A SHORT OR MID TERM RENTAL VEHICLE:** to provide transport for an employee

# READY TO INTRODUCE OR INCREASE HOMEWORKING

In %



Would you be ready to introduce or increase homeworking for your employees?  
Basis: Companies with corporate vehicles = 100%

# CORPORATE CAR SHARING IMPLEMENTATION

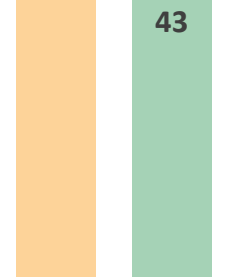
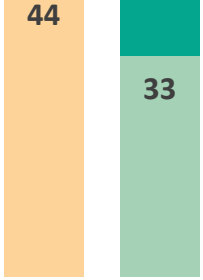
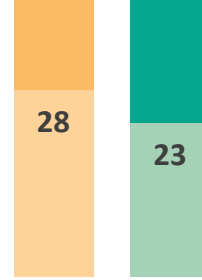
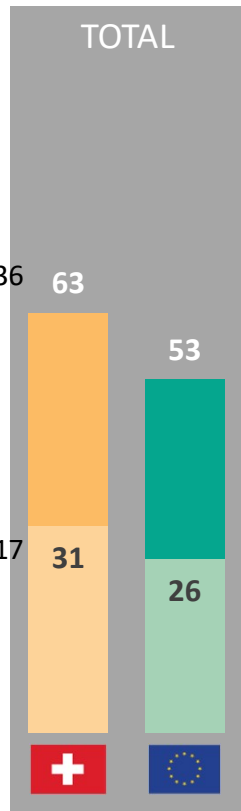
In %



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY USING



Which of the following have you implemented or will you implement in the next 3 years?  
 Response scale: Already using, considered in the next 3 years, not interested  
 Basis: companies with corporate vehicles = 100%

# RIDE SHARING IMPLEMENTATION

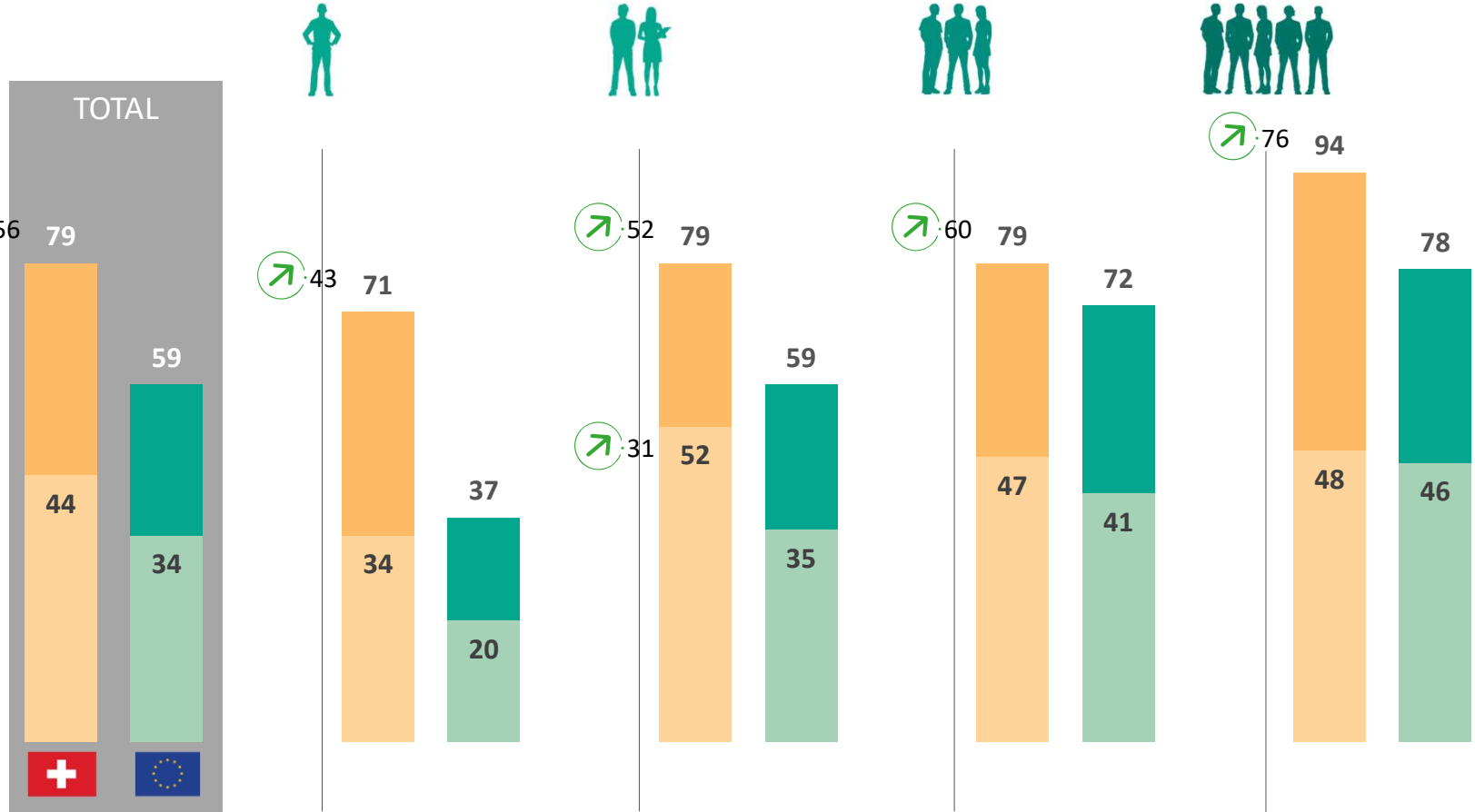
In %



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY USING



Which of the following have you implemented or will you implement in the next 3 years?  
 Response scale: Already using, considered in the next 3 years, not interested  
 Basis: companies with corporate vehicles = 100%

# BIKE (OR OTHER TWO WHEELS) SHARING / LEASING IMPLEMENTATION\*

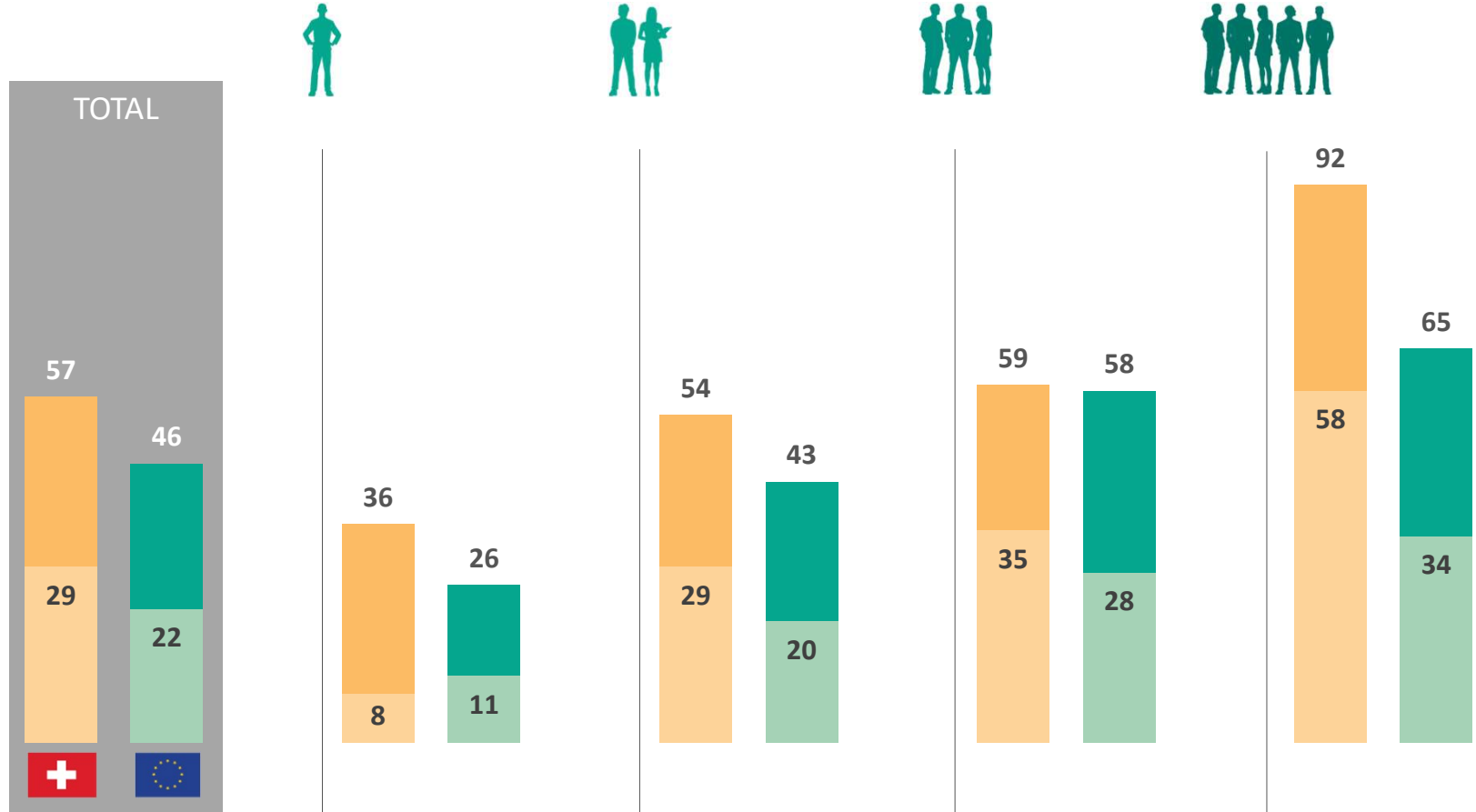
In %



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY USING



\*This item has changed, no comparison vs previous year

Which of the following have you implemented or will you implement in the next 3 years?

Response scale: Already using, considered in the next 3 years, not interested

Basis: companies with corporate vehicles = 100%

# PUBLIC TRANSPORT IMPLEMENTATION

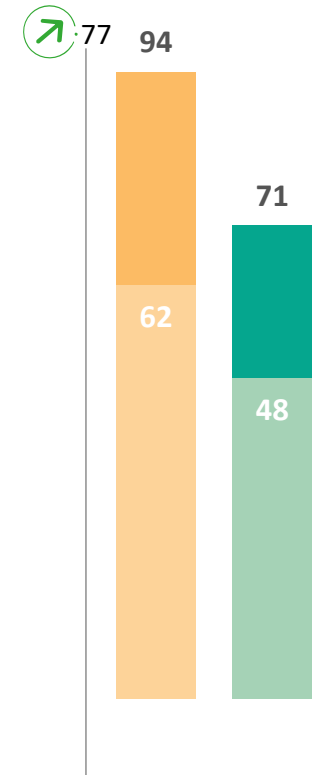
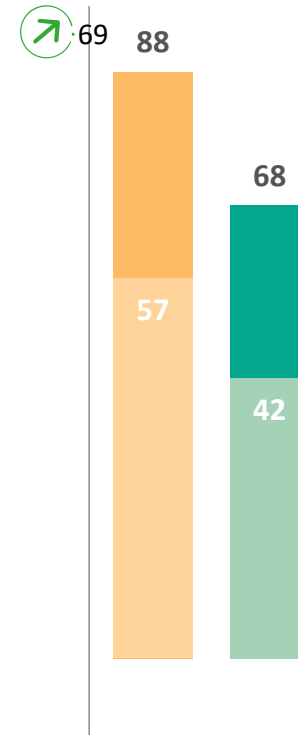
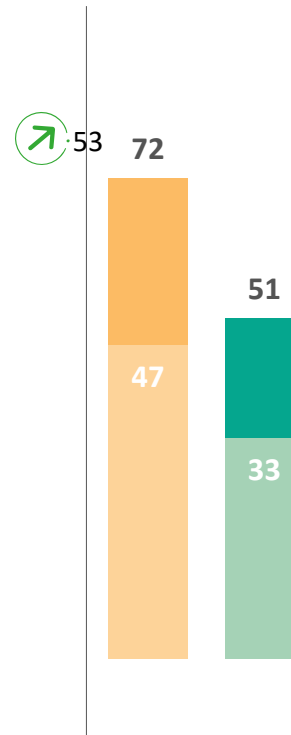
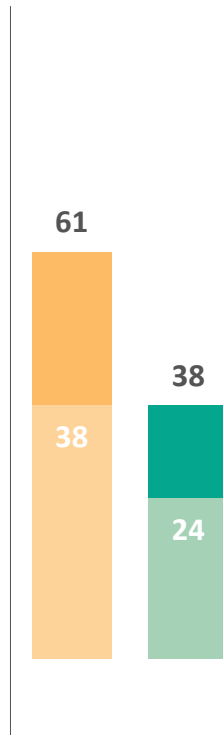
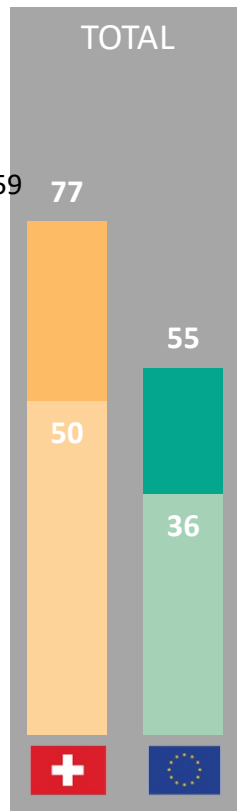
In %



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY USING



Which of the following have you implemented or will you implement in the next 3 years?  
 Response scale: Already using, considered in the next 3 years, not interested  
 Basis: companies with corporate vehicles = 100%



# MOBILITY BUDGET IMPLEMENTATION

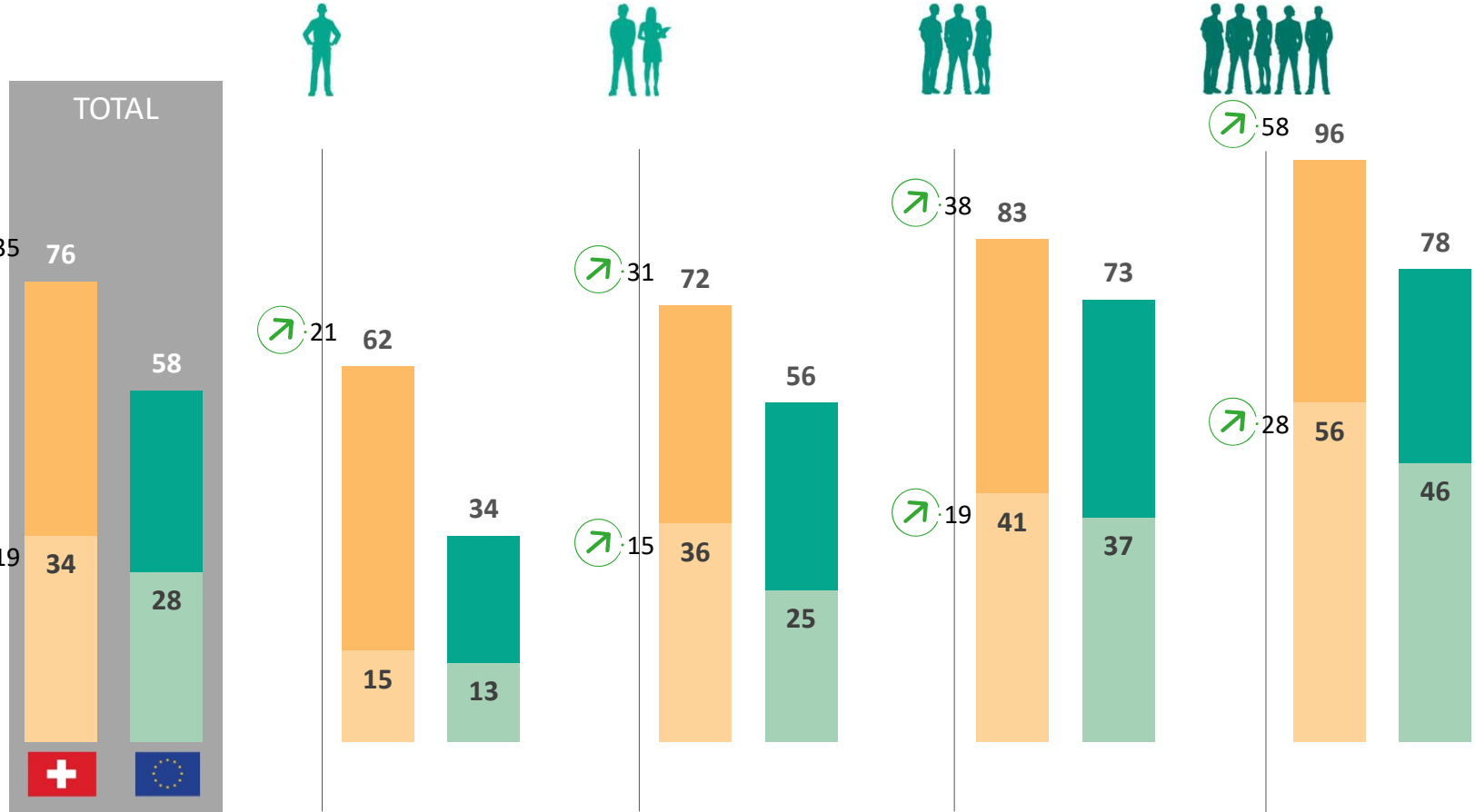
In %



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS

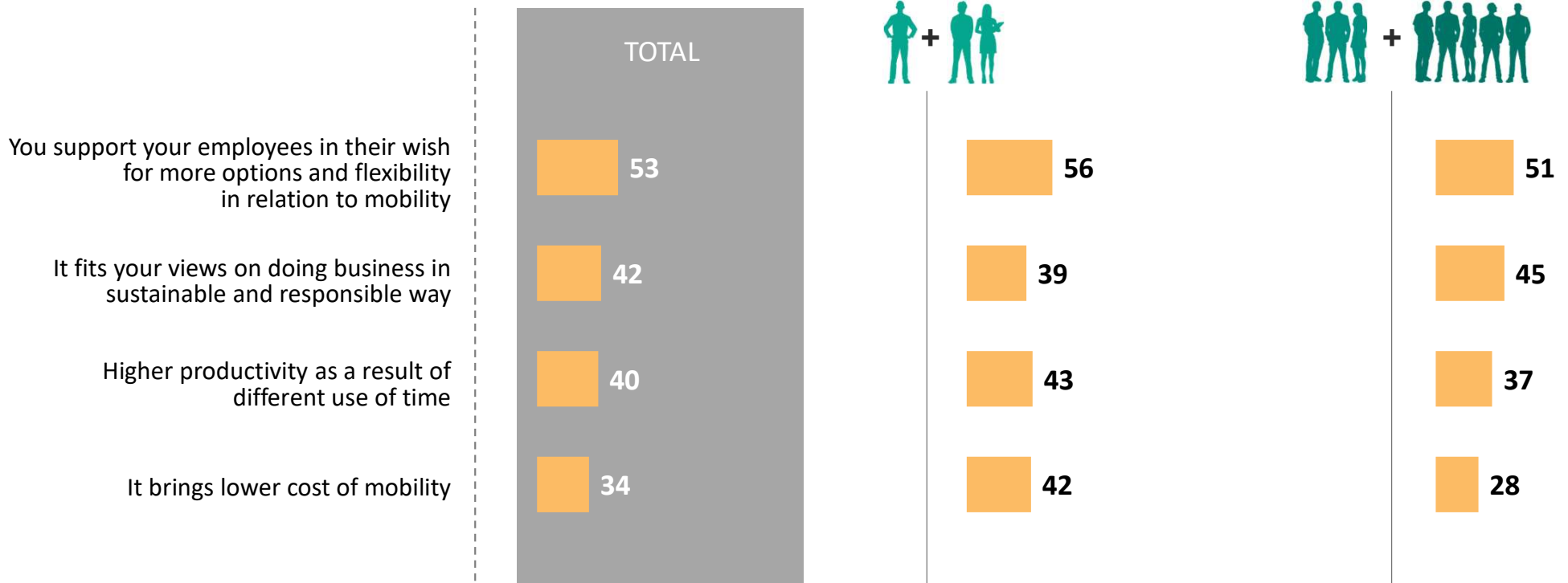


ALREADY USING



Which of the following have you implemented or will you implement in the next 3 years?  
 Response scale: Already using, considered in the next 3 years, not interested  
 Basis: companies with corporate vehicles = 100%

# REASONS TO OFFER A MOBILITY BUDGET



Why do you offer or plan to offer a mobility budget?  
 Basis: ST Already using or consider a Mobility Budget within a predefined budget

# AN APP TO BOOK MOBILITY SOLUTIONS IMPLEMENTATION\*

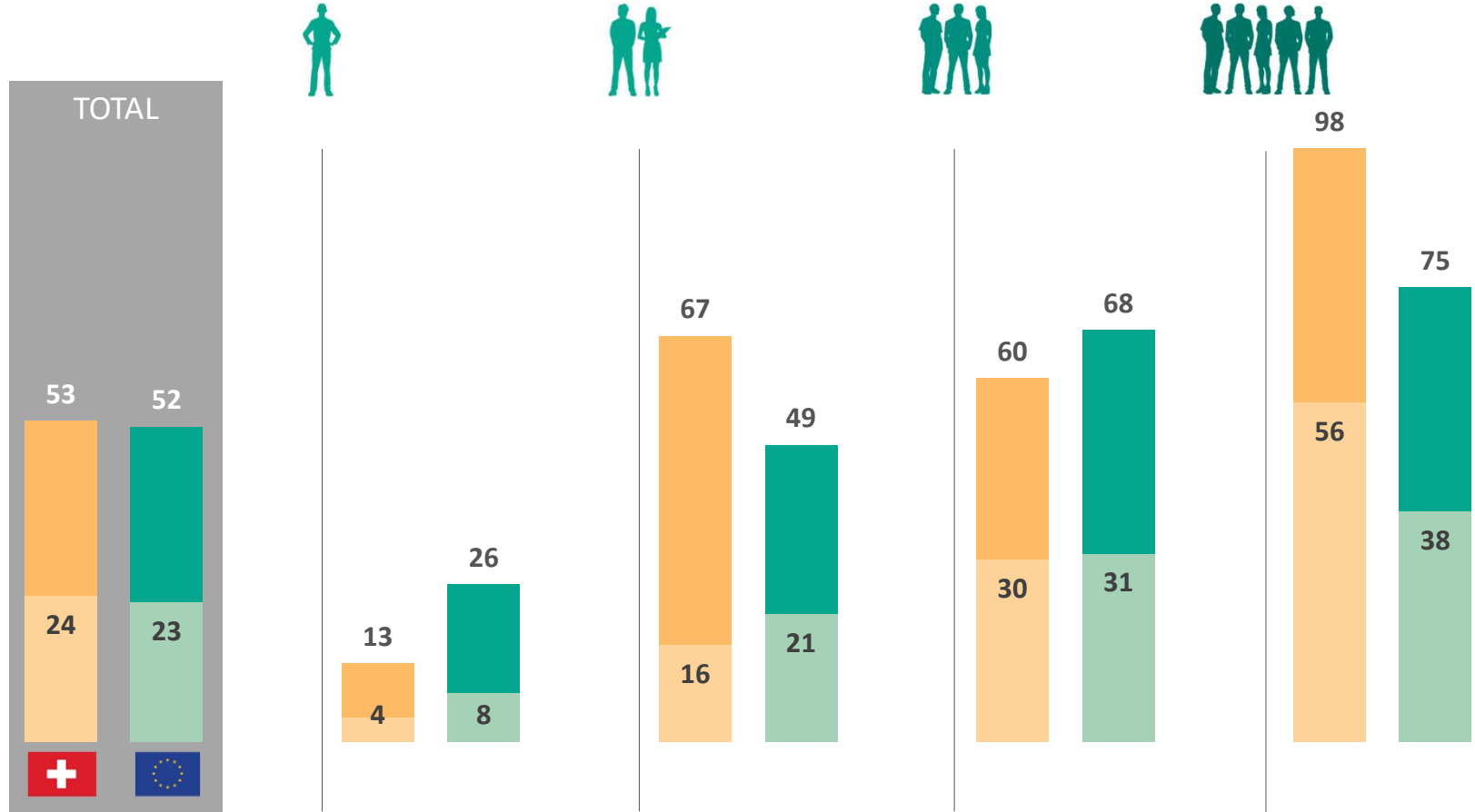
In %



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY USING



\*This item has changed, no comparison vs previous year  
 Which of the following have you implemented or will you implement in the next 3 years?  
 Response scale: Already using, considered in the next 3 years, not interested  
 Basis: companies with corporate vehicles = 100%

# PRIVATE LEASE OR SALARY SACRIFICE IMPLEMENTATION

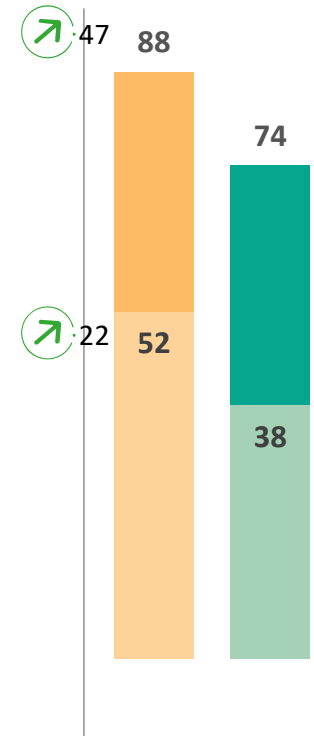
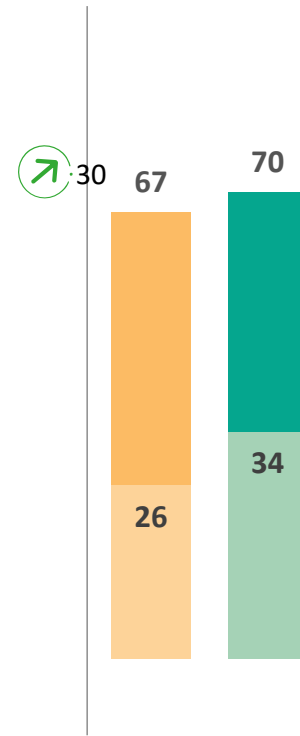
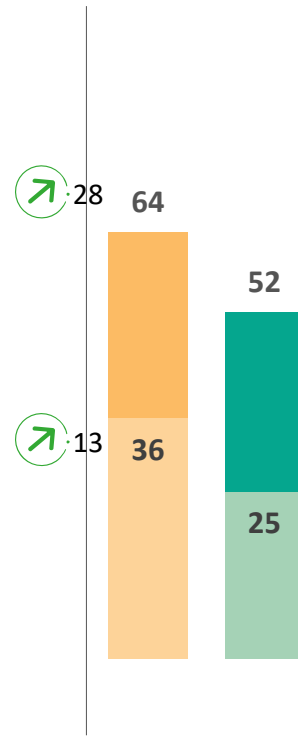
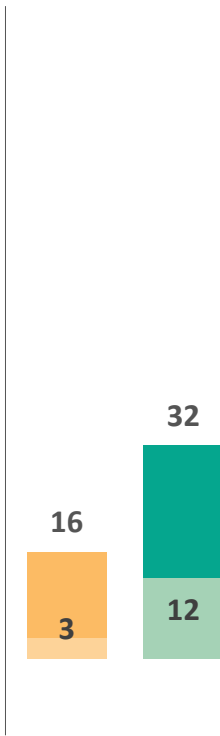
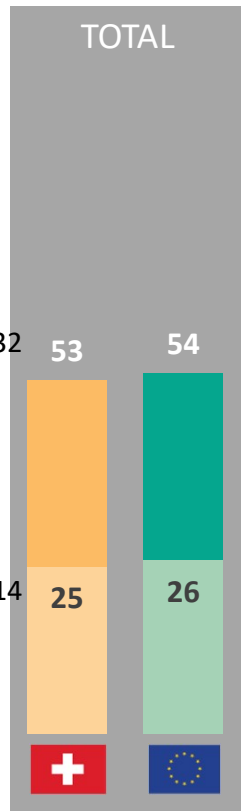
In %



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY USING



Which of the following have you implemented or will you implement in the next 3 years?  
 Response scale: Already using, considered in the next 3 years, not interested  
 Basis: companies with corporate vehicles = 100%

# SHORT OR MID-TERM RENTAL VEHICLES IMPLEMENTATION\*

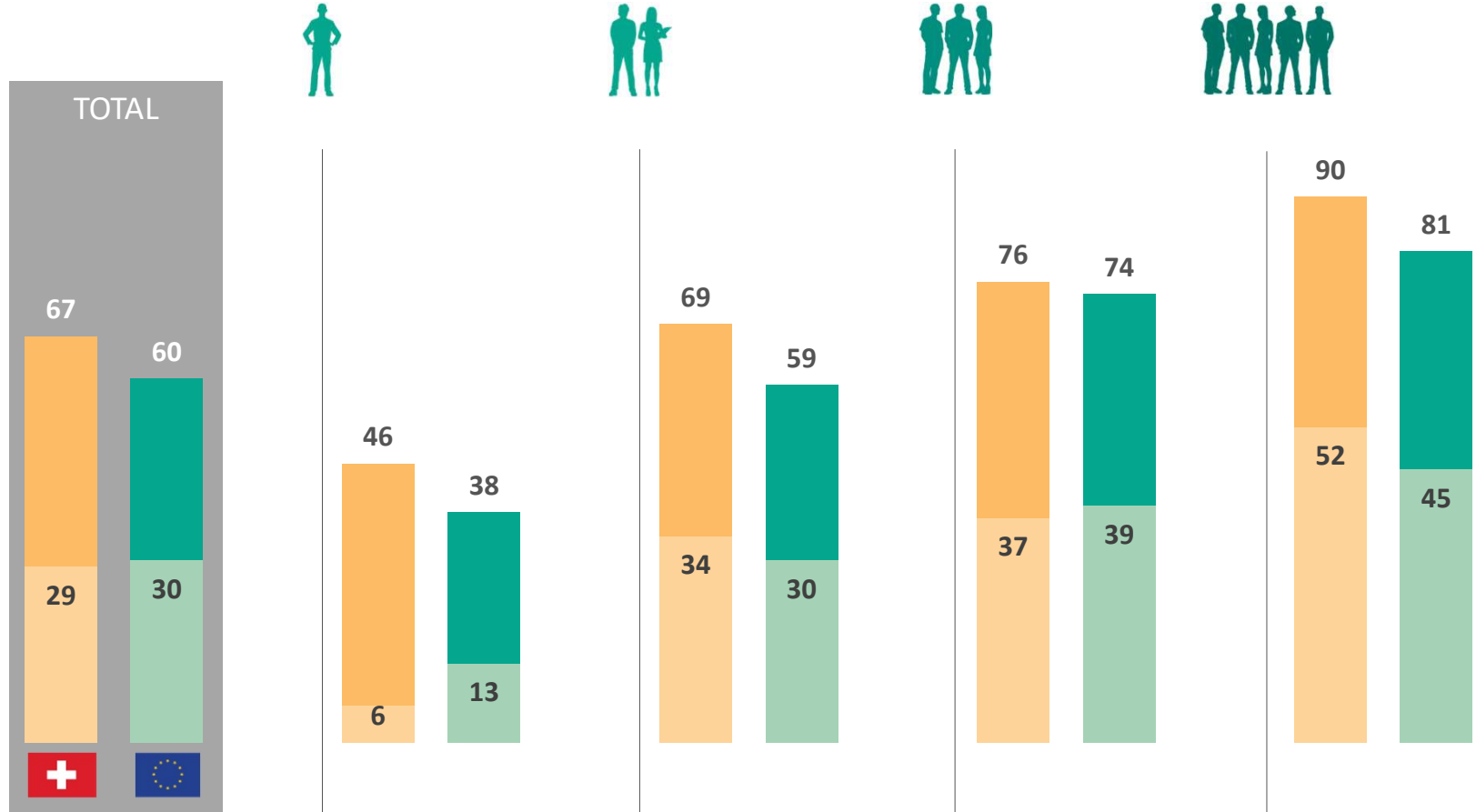
In %



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY USING

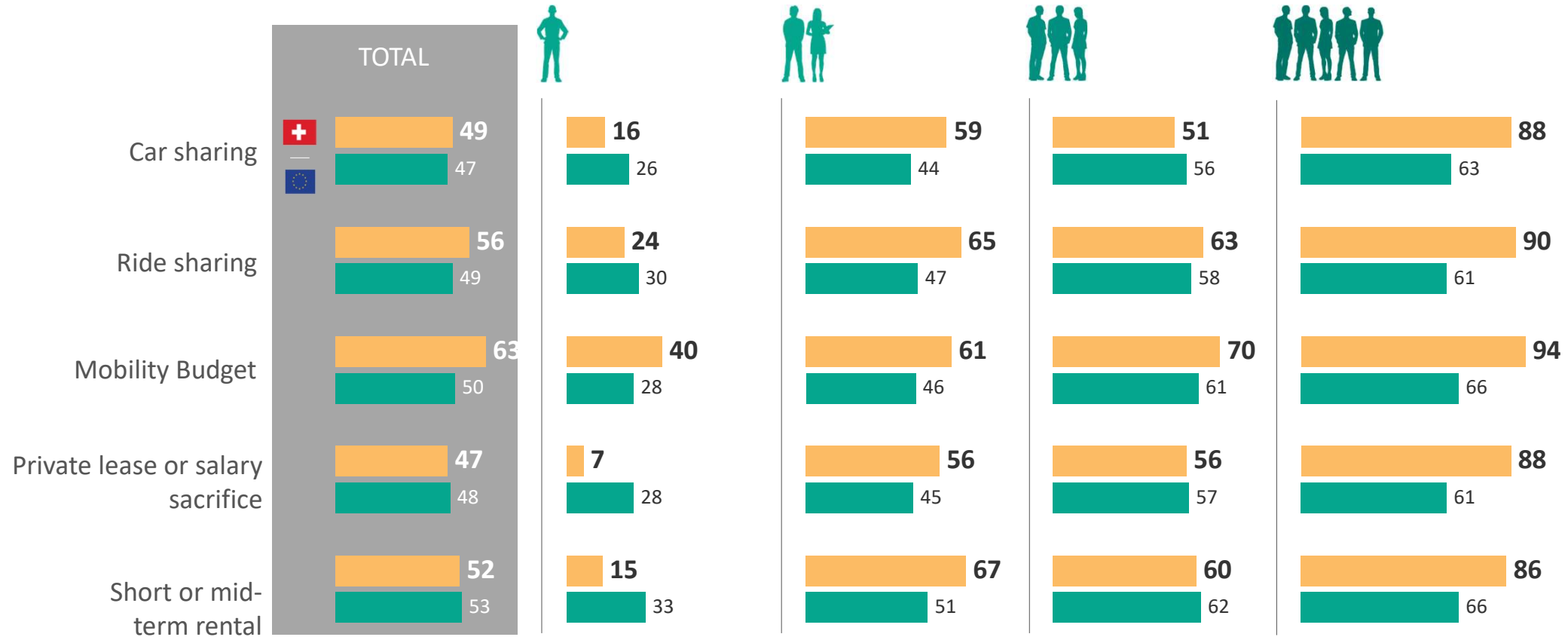


\*This question has changed, no comparison vs previous year  
 Which of the following have you implemented or will you implement in the next 3 years?  
 Response scale: Already using, considered in the next 3 years, not interested  
 Basis: companies with corporate vehicles = 100%

# MOBILITY SOLUTIONS CONSIDERED BY DRIVERS TO COMPLEMENT THEIR COMPANY VEHICLES

TOTAL Certainly or probably

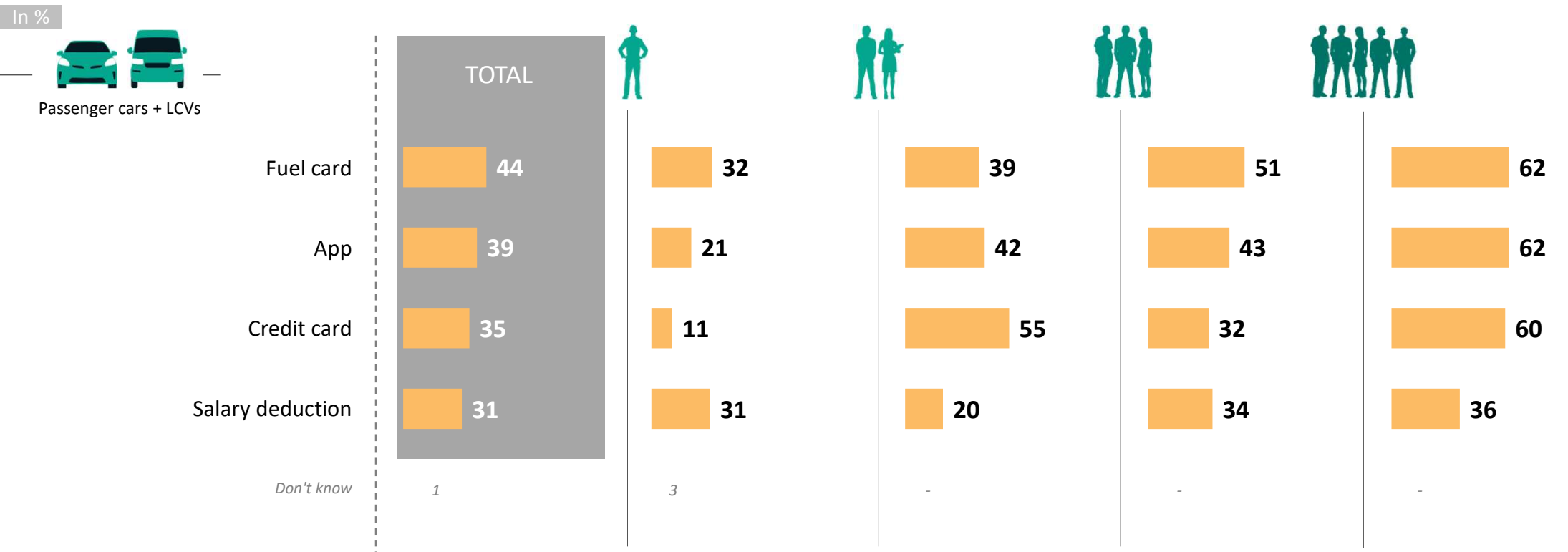
In %



New question 2021

Would you anticipate that your company car drivers would exchange all or part of their company car benefit for such alternatives?  
 .Basis: companies using or considering alternative mobility solutions

# WAY OF PAYMENT FOR THE PARKING



How do your employees pay for the parking of their company car?  
 Basis: Companies with corporate vehicles = 100%

6

# HOW ARE COMPANIES FINANCING THEIR FLEET?





# OPERATING LEASING IS DEVELOPING, AT THE EXPENSE OF SELF PURCHASE THAT REMAINS TOP CHOICE.

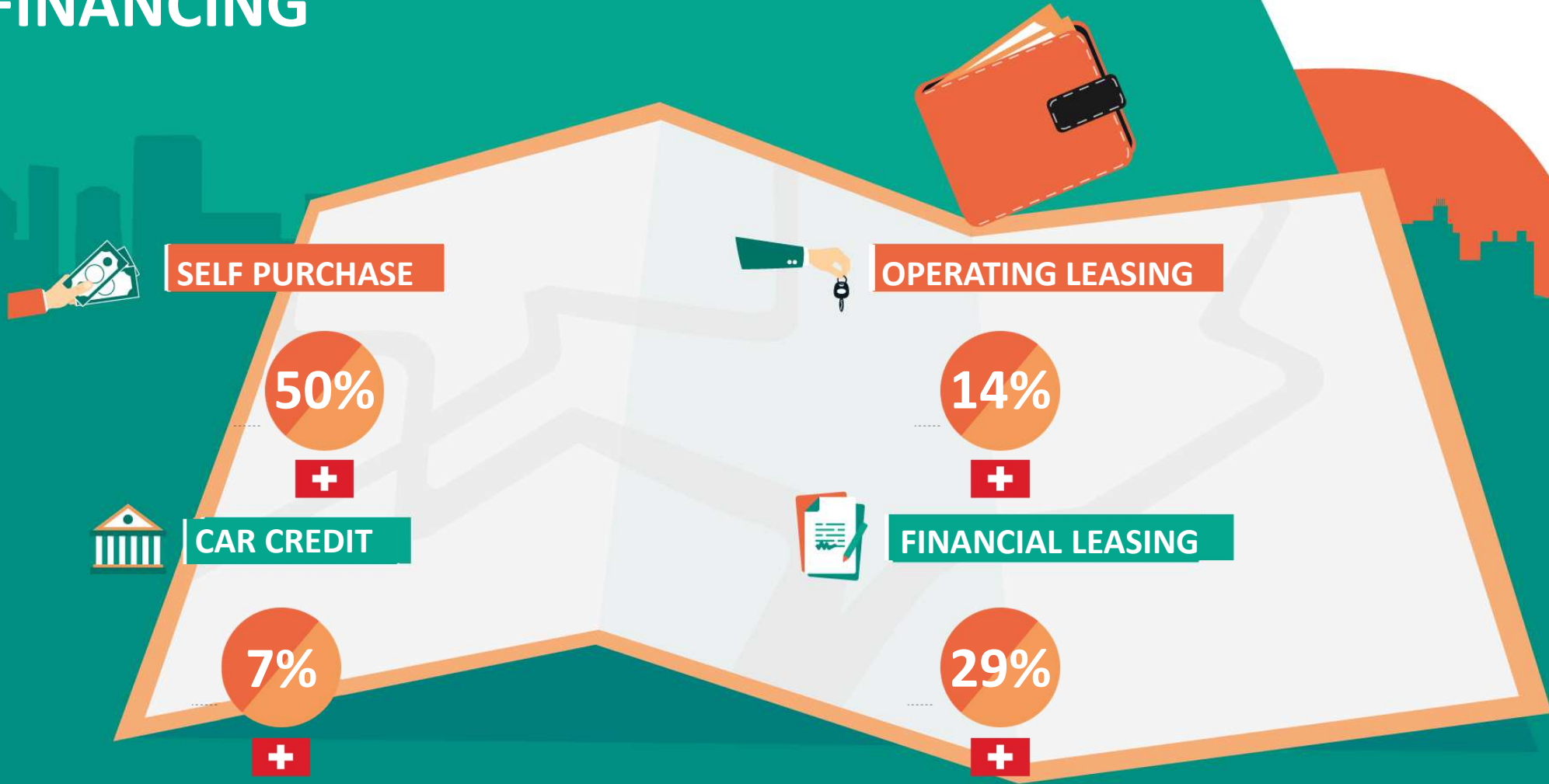
1

- Recent data highlight the **increase of operating leasing** while **self purchase remains the leading financing method**:
  - **Among SMEs** (up to 100 employees), **more than half of the respondents still prefer self purchase**, while 1 out of 4 would choose financial leasing. Operating leasing is progressing (12%, +8pts) but remains low, so is car credit (6%).
  - **Among larger companies** (100 employees and more), self purchase is losing ground (45%, -16pts). **Financial leasing is consolidating** its 2<sup>nd</sup> position at 33%. **Operating leasing and car credit are progressing** (15% and 7%).

2

- **Even if it remains less developed than in the rest of Europe, operating leasing confirms its potential, with 26% of companies (essentially large ones) who certainly intend to use this financing method among others in the future.**

# FINANCING



# MAIN FINANCING METHOD

Proportion of companies using the following solutions as their main financing method for their fleet vehicles



What is the main financing method used to finance your company vehicles today?  
Basis: companies with corporate vehicles = 100%

# EVOLUTION OF THE MAIN FINANCING METHOD

Focus on 1 to 99

In %

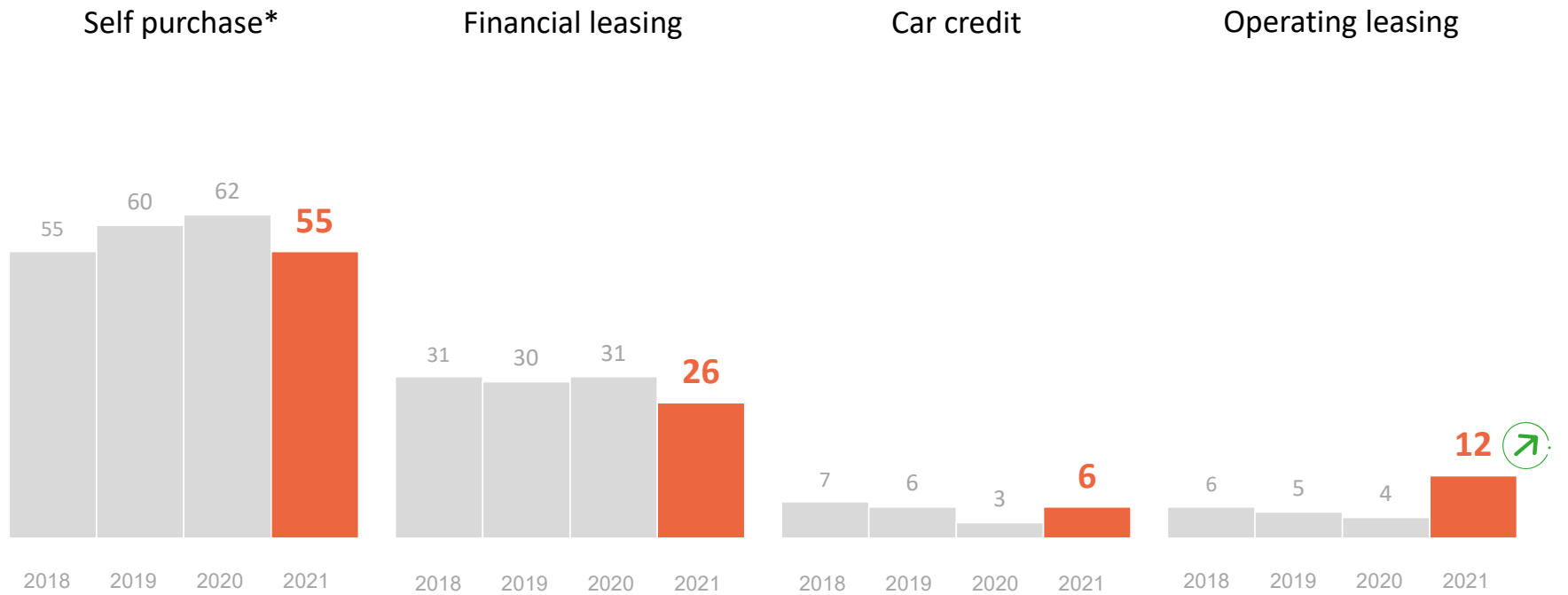


Passenger cars + LCVs



\*Self-purchase = outright purchase + credit (other than car credit)

Data have been consolidated: 3 years average



What is the main financing method used to finance your company vehicles today?  
Basis: companies with corporate vehicles = 100%

# EVOLUTION OF THE MAIN FINANCING METHOD

Focus on 100 and more



Self purchase\*

Financial leasing

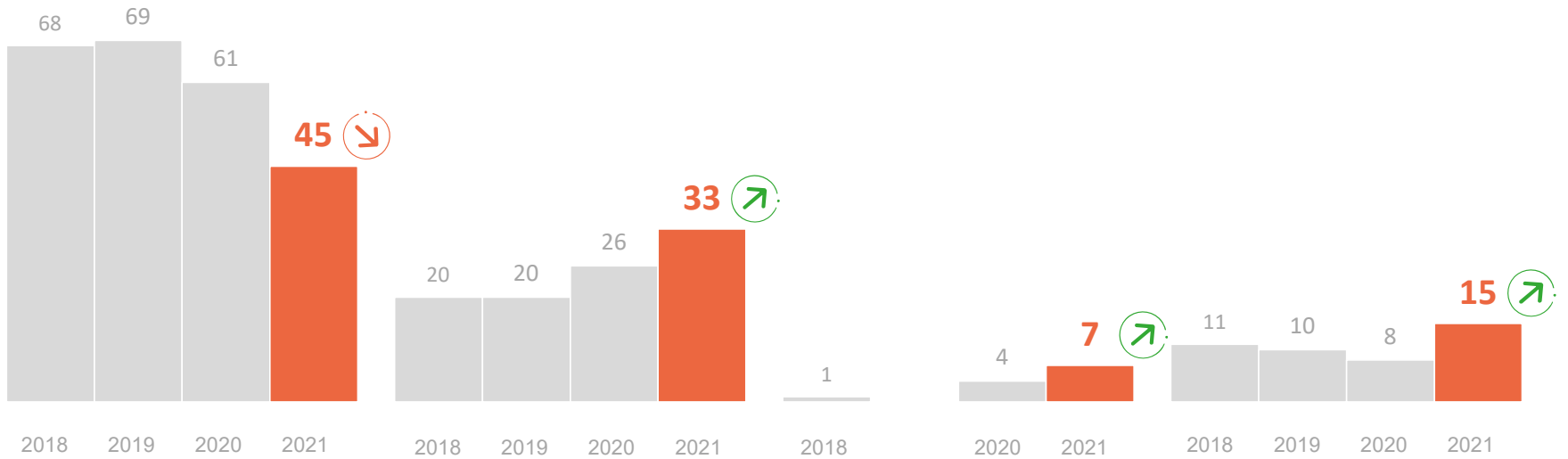
Car credit

Operating leasing



\*Self-purchase = outright purchase + credit (other than car credit)

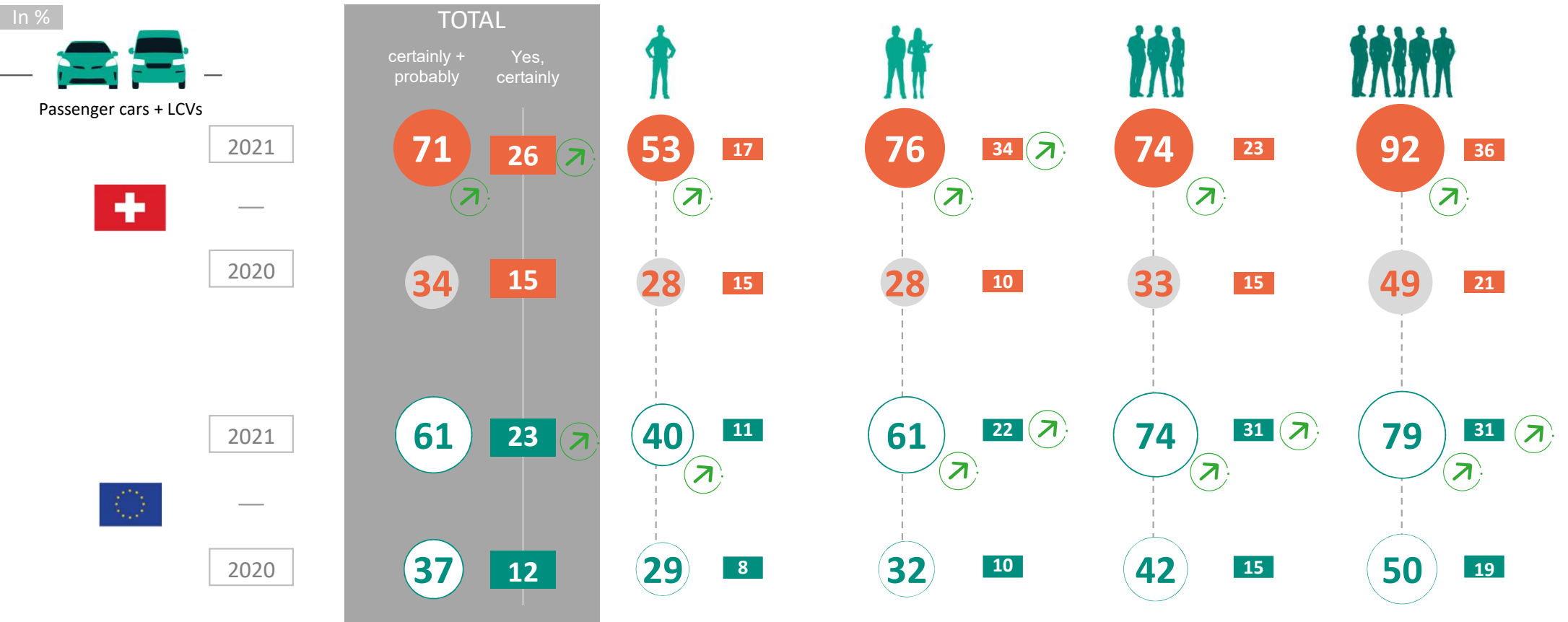
Data have been consolidated: 3 years average



What is the main financing method used to finance your company vehicles today?  
Basis: companies with corporate vehicles = 100%

# EVOLUTION OF THE INTENTION TO DEVELOP OPERATING LEASING

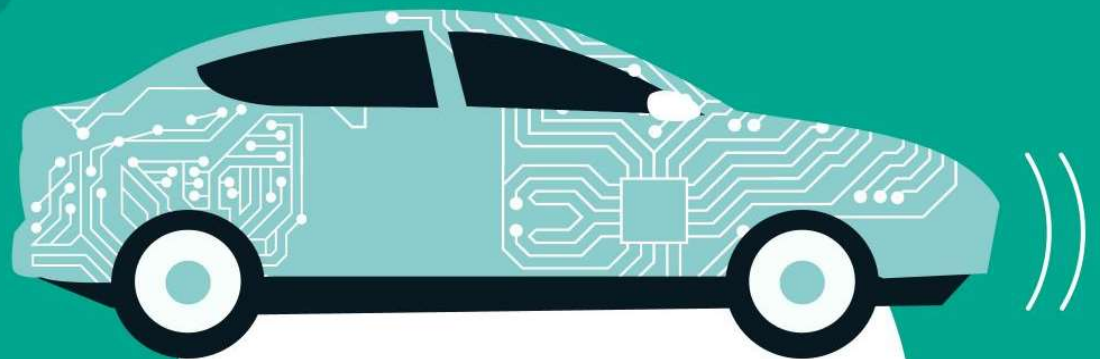
Proportion of companies having the intention to develop operational leasing



In the next three years do you intend to introduce or increase use of Operating Lease to finance your corporate fleet?  
Basis: companies with corporate vehicles = 100%

7

# WHAT ARE THE USAGES IN TERMS OF CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY EQUIPMENT?



# AS COVID-19 ACCELERATES COMPANIES' DIGITAL TRANSFORMATION, CONNECTED VEHICLES USAGE IS IMPORTANT AMONG MEDIUM AND LARGE COMPANIES.

1

- 58% of Swiss companies use connected vehicles, certainly **encouraged by the digital acceleration impulsed by the COVID-19 crisis and the development of BEV cars** as connected vehicles can help fleet managers to optimize the battery charge management.

2

- In detail: development of connected vehicles is **homogeneous for benefit cars, tool cars and LCVs**. However, the **gap between small and big companies is very significant**:
  - **While large companies are broadly using it** (7 to 9 out of 10 companies with more than 100 employees use connected vehicles)...
  - ... **smaller companies still need to be convinced**, as their usage remains stable and still far behind large companies (17% of usage for less than 10 employees).

3

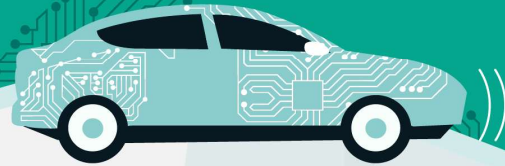
- **Locate vehicles or improve vehicle security is now the key motivation** (59%), together with drivers' safety and behavior (56%).  
**But COVID-19 crisis has also urged managers to:**

- **reduce fleet costs** (51%) notably by avoiding unallowed usages (51%).
- **optimize car sharing** (44%).

Last, reducing environmental impact (49%) is also important, in line with the growing adoption of alternative technologies.



# CONNECTED VEHICLES



## USE CONNECTED VEHICLES



58%



56%



## TOP 3 REASONS



59%

#1: To locate vehicles or improve vehicle security



50%

#2: To improve drivers' safety / behaviors

56%

43%

#3: To avoid not allowed usage

51%

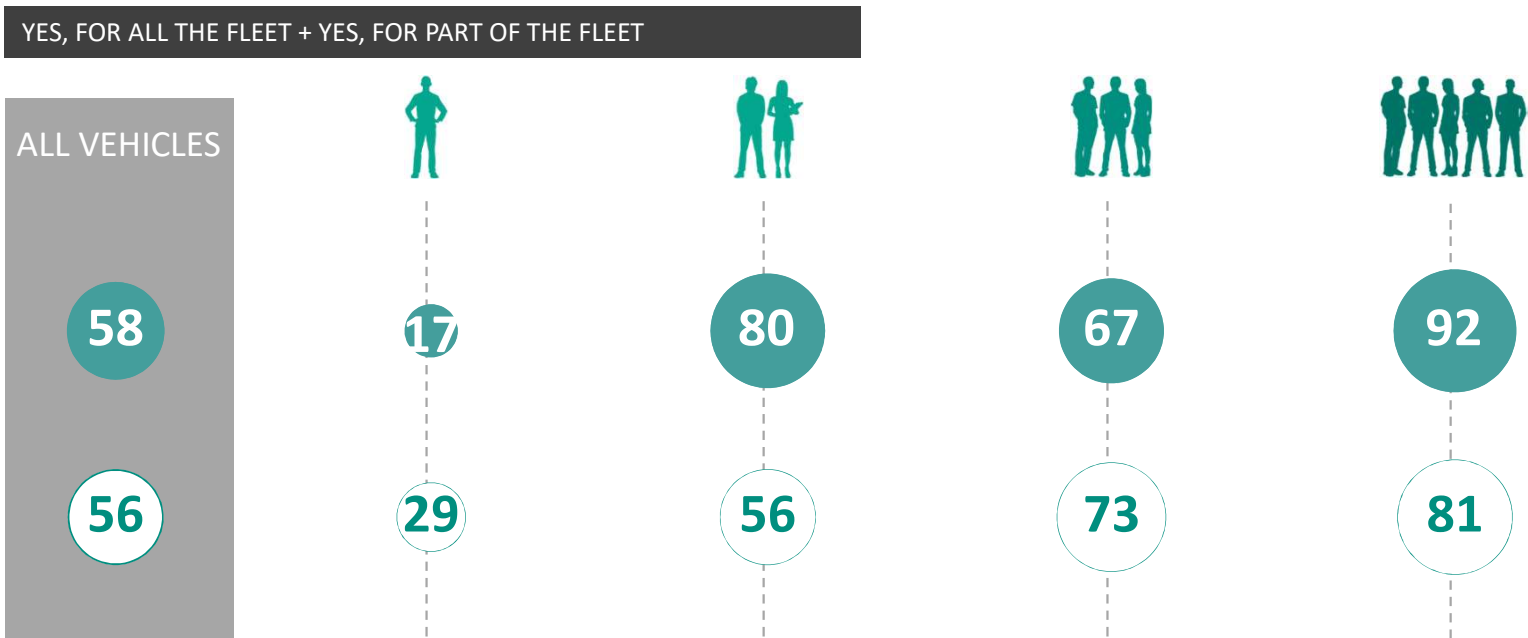
42%

# PROPORTION OF COMPANIES USING CONNECTED VEHICLES\*

In %



Passenger cars + LCVs



\*This question has changed, no comparison vs previous year

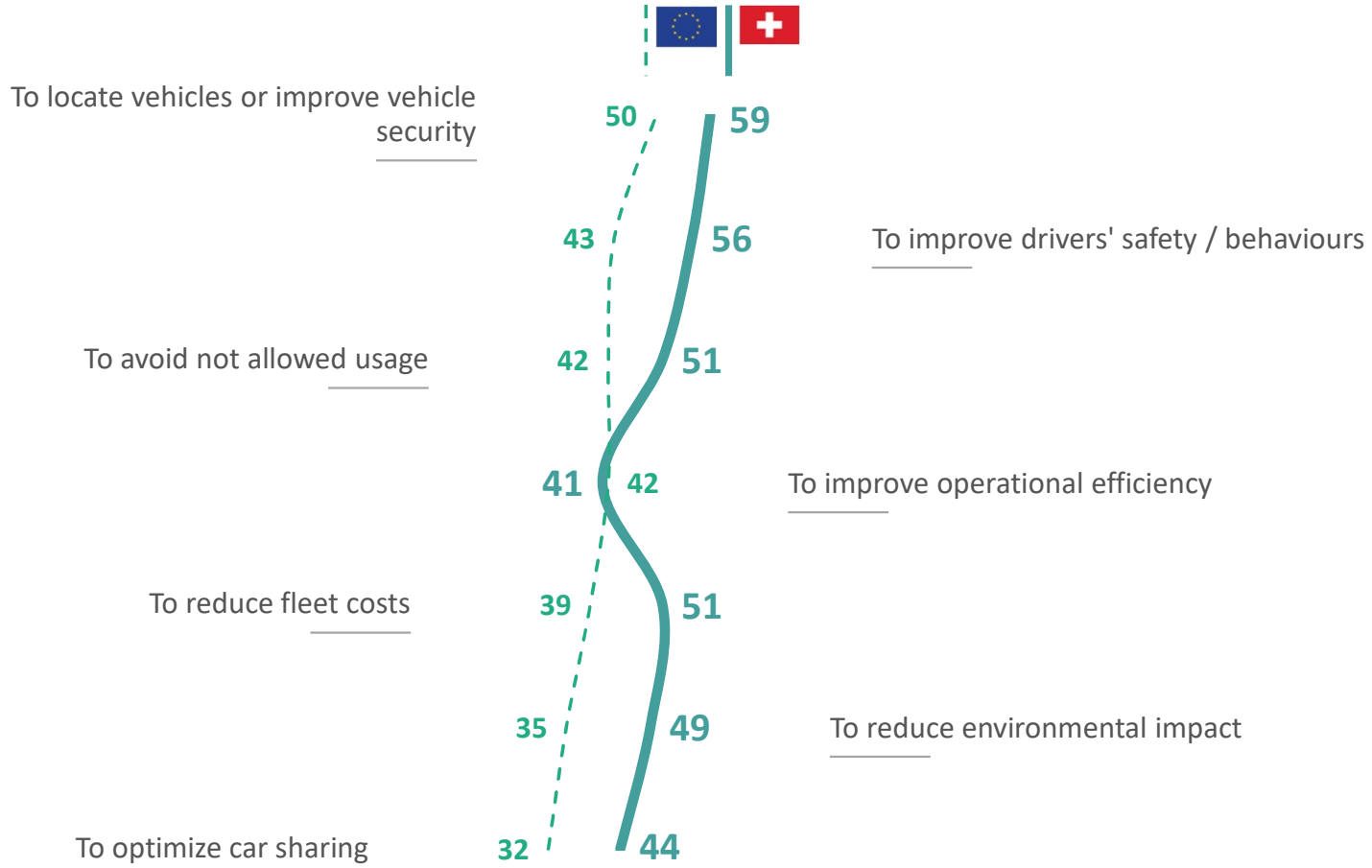
Is your fleet connected by a telematic tool?

Telematics enables transmission of data from a vehicle such as fuel consumption, driver behaviour and vehicle location. Telematics do not include data transmission by the mean of the users' smartphones

Basis: companies with corporate passenger cars / companies with corporate LCVs

# REASONS FOR USING CONNECTED VEHICLES\*

All vehicles



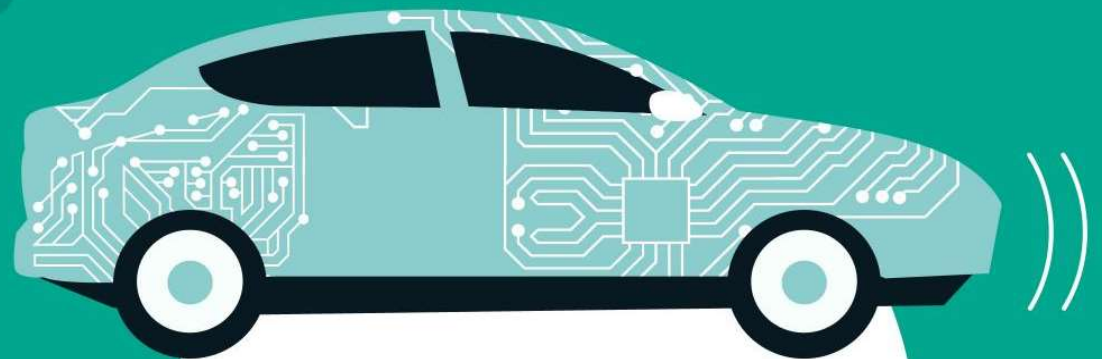
\*This question has changed, no comparison vs previous year

What are the two main reasons why your fleet is connected by Telematics?  
Basis: companies with connected vehicles due to Telematics

7

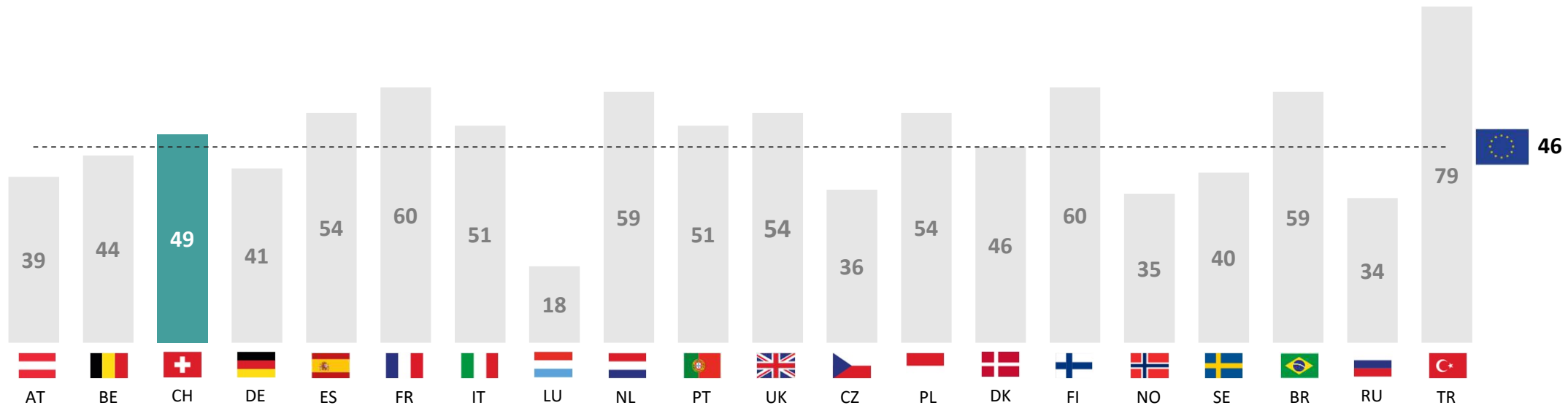
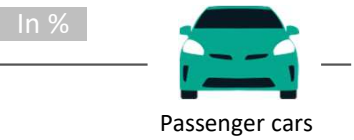
# CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY

## A. PASSENGER CARS



# PROPORTION OF COMPANIES USING CONNECTED VEHICLES\*

## Passenger cars



\*This question has changed, no comparison vs previous year

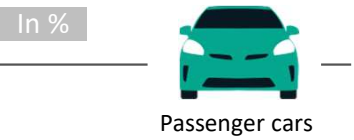
Is your fleet connected by a telematic tool?

Telematics enables transmission of data from a vehicle such as fuel consumption, driver behaviour and vehicle location. Telematics do not include data transmission by the mean of the users' smartphones

Basis: companies with corporate passenger cars

# PROPORTION OF COMPANIES USING CONNECTED VEHICLES\*

## Passenger cars



HOW TO READ THE RESULTS?

Among companies owning passenger cars, 49% use connected vehicles.

YES, FOR ALL THE FLEET + YES, FOR PART OF THE FLEET

Basis: companies with at least one passenger car in fleet



49



46



16

25



61

42



45

57



80

66

\*This question has changed, no comparison vs previous year

Is your fleet connected by a telematic tool?

Telematics enables transmission of data from a vehicle such as fuel consumption, driver behaviour and vehicle location. Telematics do not include data transmission by the mean of the users' smartphones

Basis: companies with corporate passenger cars

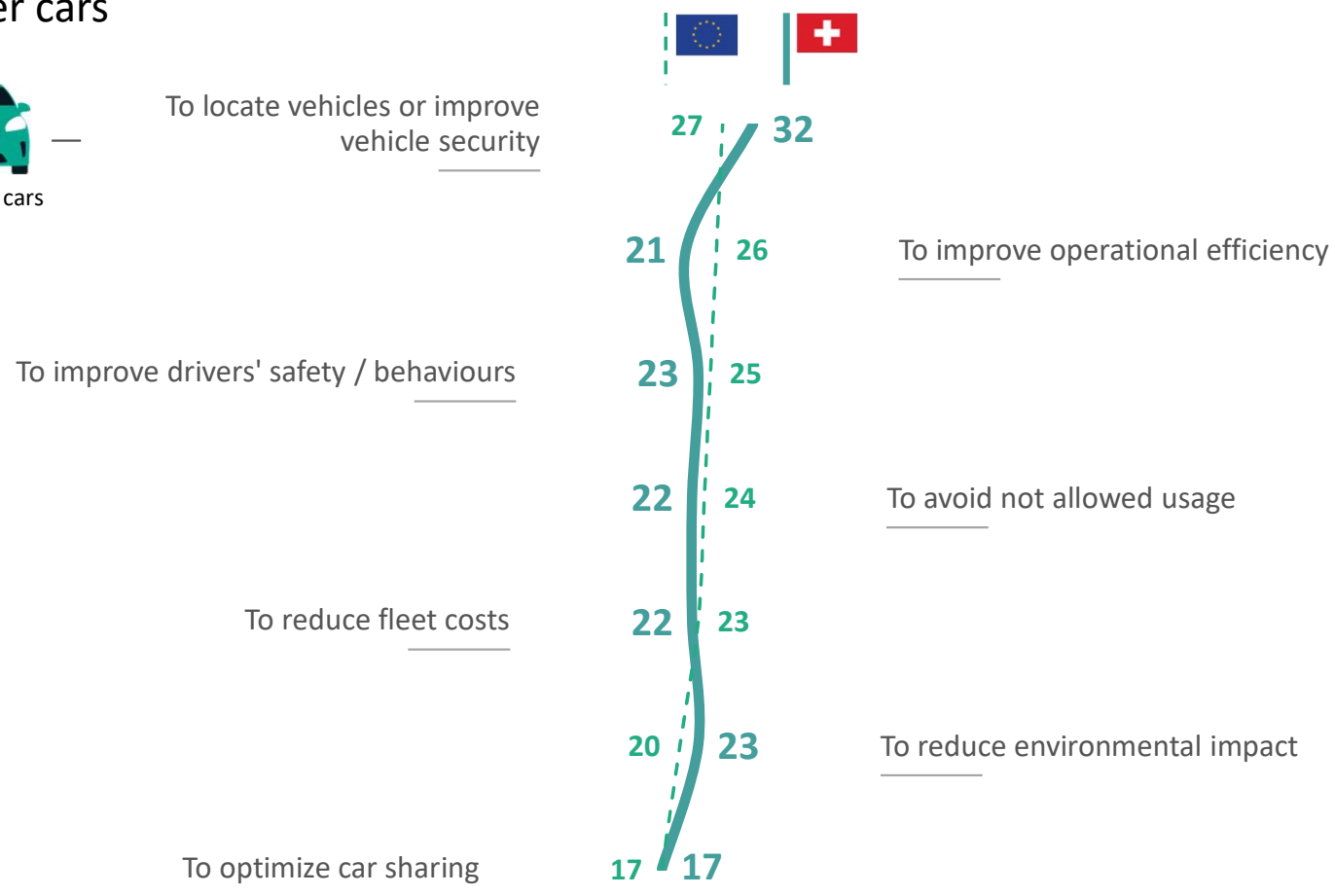
# REASONS FOR USING CONNECTED VEHICLES\*

## Passenger cars

In %



Passenger cars



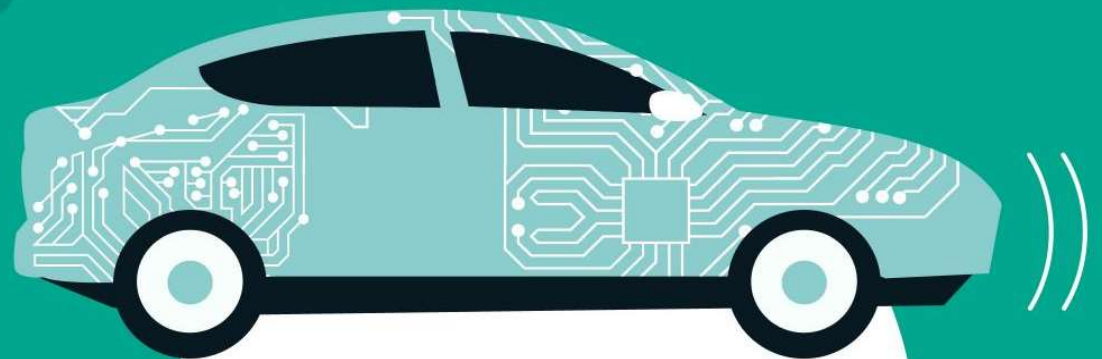
\*This question has changed, no comparison vs previous year

What are the two main reasons why your fleet is connected by Telematics?  
Basis: companies with connected vehicles due to Telematics

7

# CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY

D. LCVs





# PROPORTION OF COMPANIES USING CONNECTED VEHICLES\*

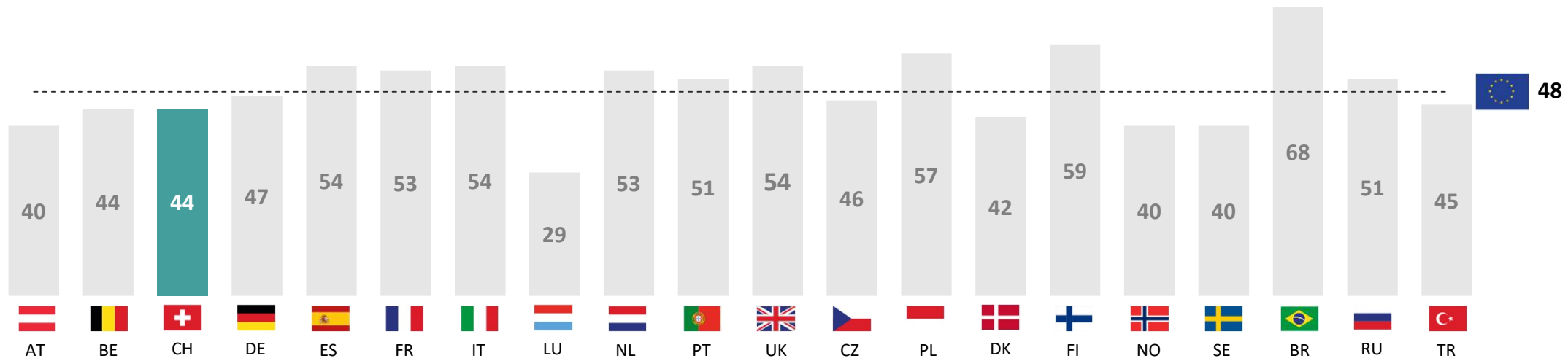
LCVs

In %



LCVs

PROPORTION OF COMPANIES HAVING IMPLEMENTED CONNECTED VEHICLES FOR THEIR LCVs



\*This question has changed, no comparison vs previous year

Is your fleet connected by a telematic tool?

Telematics enables transmission of data from a vehicle such as fuel consumption, driver behaviour and vehicle location. Telematics do not include data transmission by the mean of the users' smartphones

Basis: companies with corporate LCVs

# PROPORTION OF COMPANIES USING CONNECTED VEHICLES\*

LCVs

In %



LCVs

## HOW TO READ THE RESULTS?

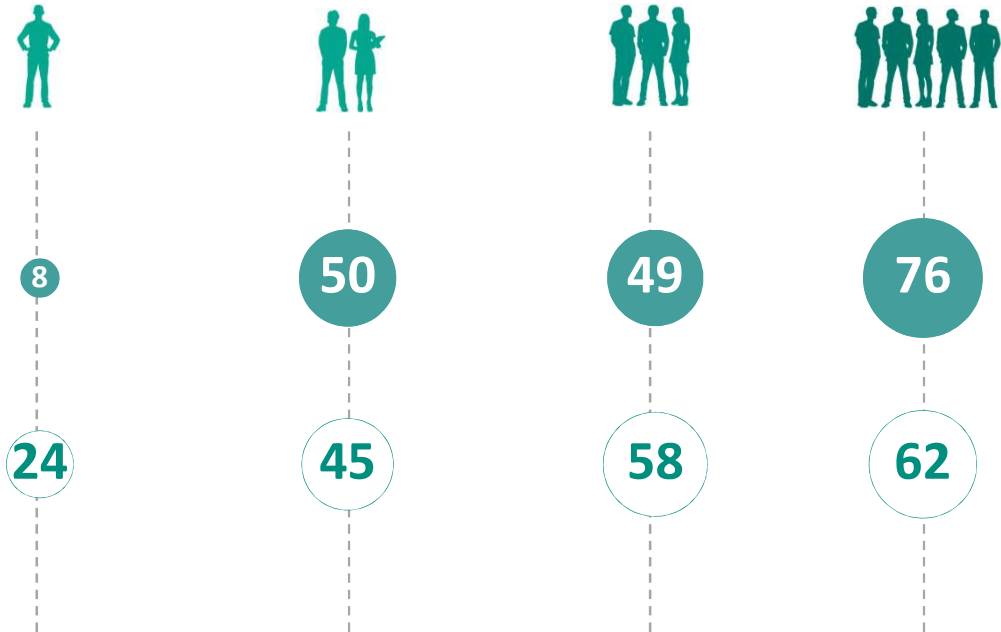
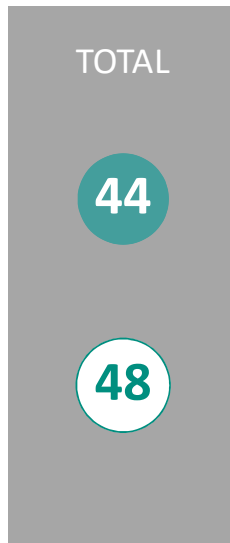
Among companies owning LCVs, 44% use connected vehicles for LCVs

YES, FOR ALL THE FLEET + YES, FOR PART OF THE FLEET

Basis: companies with at least one LCV in fleet



—



\*This question has changed, no comparison vs previous year

Is your fleet connected by a telematic tool?

Telematics enables transmission of data from a vehicle such as fuel consumption, driver behavior and vehicle location. Telematics do not include data transmission by the mean of the users' smartphones

Basis: companies with corporate LCVs

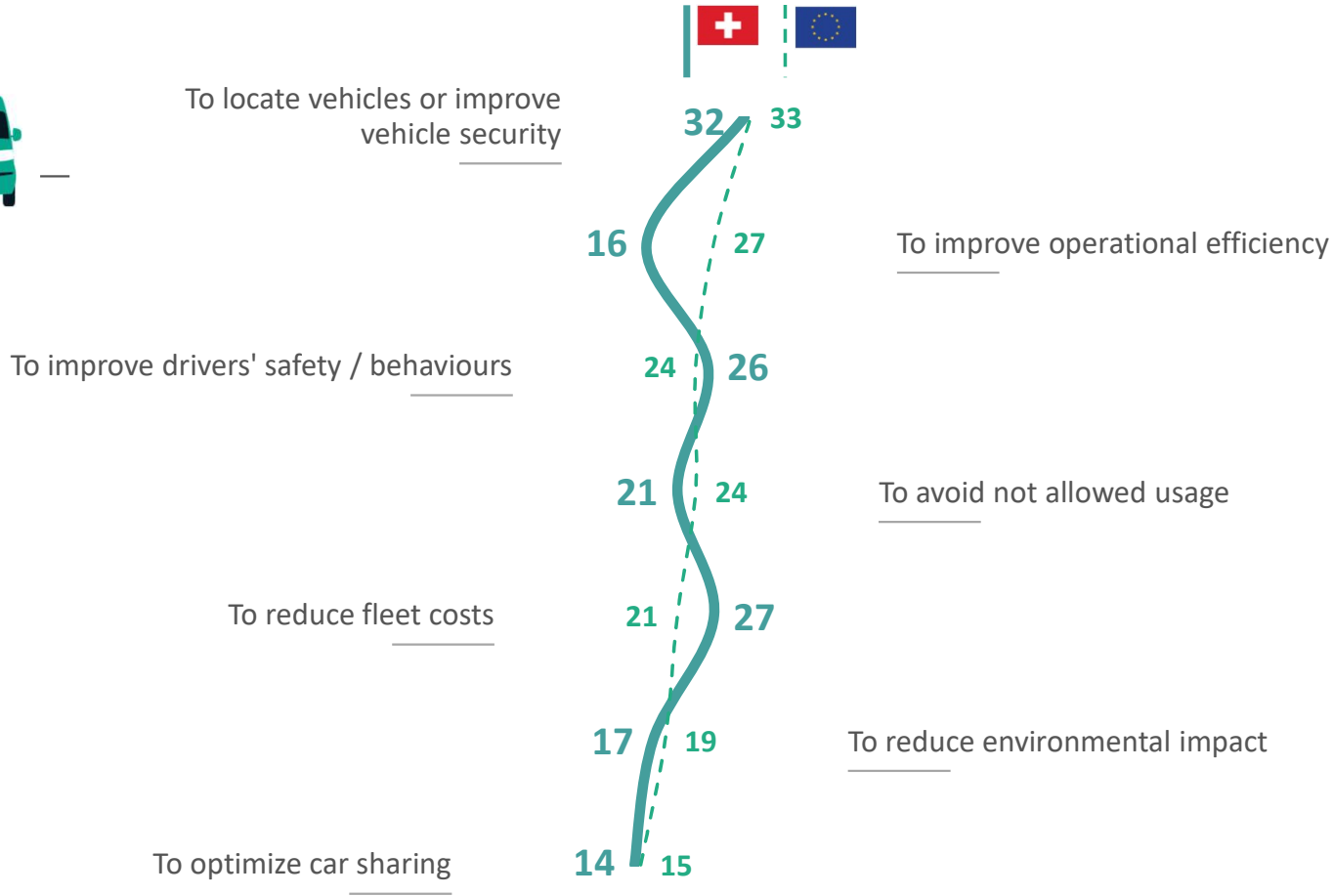
# REASONS FOR USING CONNECTED VEHICLES\*

LCVs

In %



LCVs



\*This question has changed, no comparison vs previous year

What are the two main reasons why your fleet is connected by Telematics?  
Basis: companies with connected vehicles due to Telematics



Contact: Michael Klasa  
Consulting & AMO  
michael.klasa@arval.ch

THANK YOU

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