

Arval Mobility
Observatory



MOBILITY AND FLEET BAROMETER 2022



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1

CONTEXT AND METHODOLOGY





— 1

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



— 2

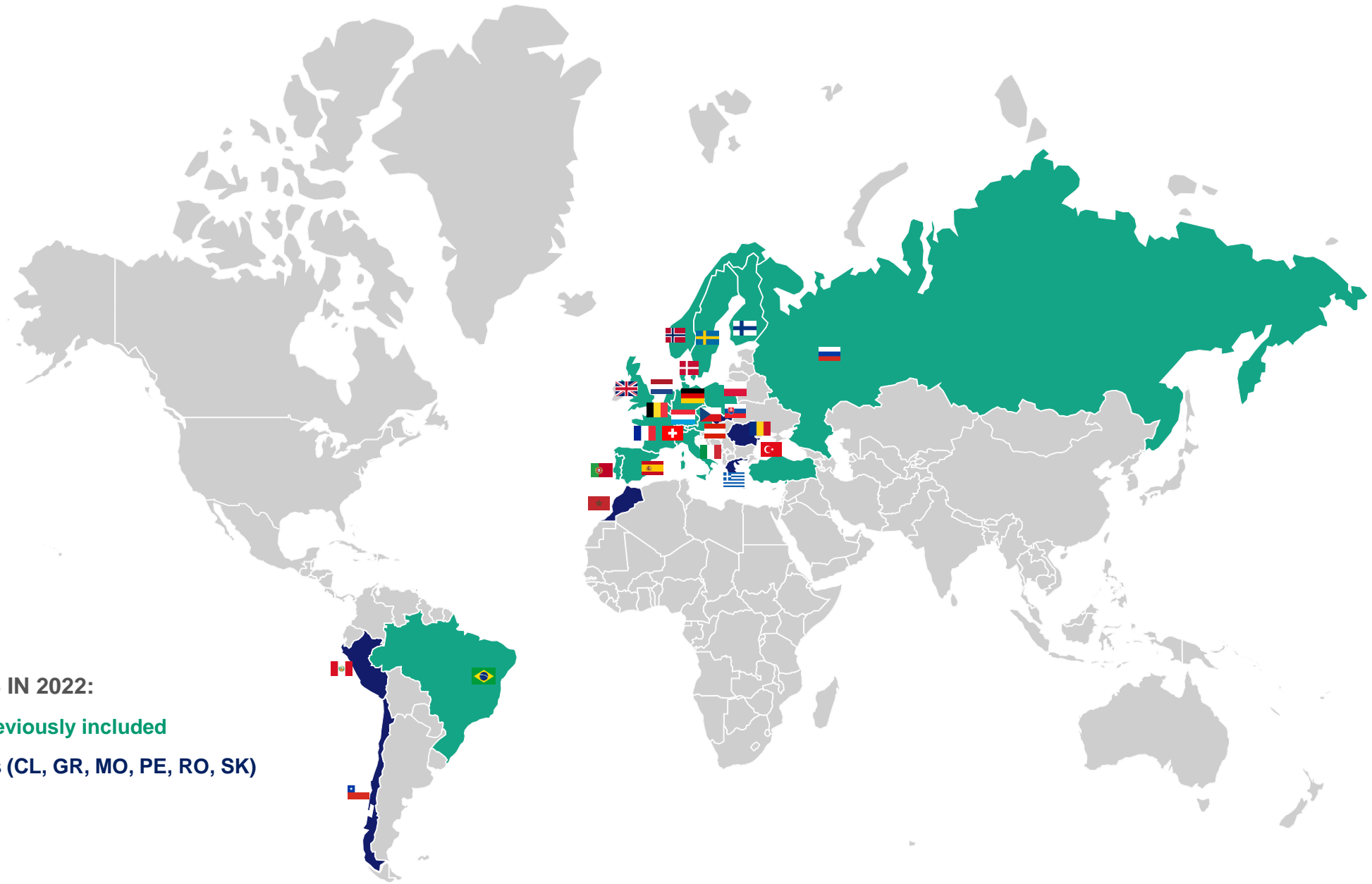
WHAT KIND OF VEHICLES
WILL THE MARKET
EXPECT IN 3 YEARS?



— 3

HOW WILL NEW MOBILITY
SOLUTIONS AFFECT
BUSINESS MODELS?

SCOPE OF THE SURVEY



26 COUNTRIES IN 2022:

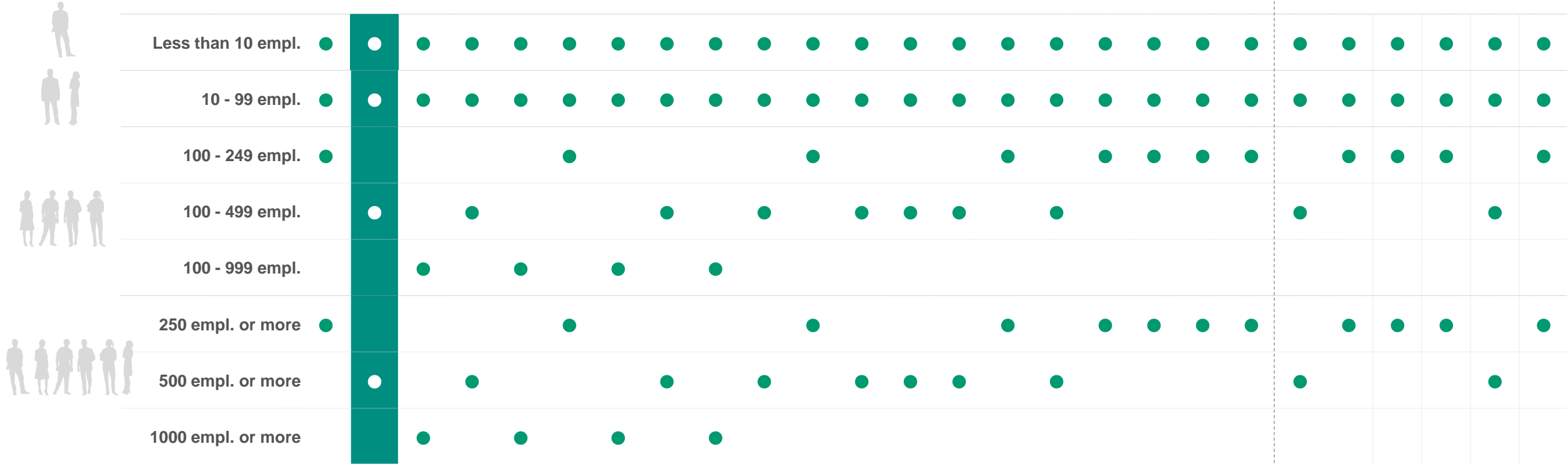
- 20 countries previously included
- 6 new countries (CL, GR, MO, PE, RO, SK)

COMPANY SIZE SEGMENT DEFINITION

WORLD

EUROPE

OUTSIDE EUROPE



METHODOLOGY



DATA COLLECTION METHOD



FIELDWORK PERIOD



TARGET



QUOTAS



SAMPLE



DURATION OF INTERVIEW

CATI CAWI SYSTEM

- Recruitment by telephone with a mixed data collection method, offering a possibility
- to answer to the rest of the Qnr by telephone,
 - or to complete the survey online via the link sent by email



COMPANY FLEET DECISION MAKERS in companies of all industries using at least 1 CORPORATE VEHICLE

COMPANY SIZE & SECTOR

5 896 through Europe
1 680 out of Europe

10 minutes on average

7 576 Interviews in total

READING NOTES ABOUT THE REPORT

In this report, when a significant difference vs last year is observed (95% statistic confidence level), a reminder of last year figure is shown with the following symbol:



XX

Significantly higher than 2021 year



XX

Significantly higher than 2020 year

XX = score 2021 or 2020



XX

Significantly lower than 2021 year



XX

Significantly lower than 2020 year

XX = score 2021 or 2020

Some graphics may not be perfectly equal to 100%. It is due to roundings.

NETs are groups of similar answers combined in the stub (ex. NET Interested = very interested + somewhat interested)/

NUMBER OF INTERVIEWS CONDUCTED IN SWITZERLAND



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



Companies with less than 10 employees
101 INTERVIEWS



Companies with 10 to 99 employees
60 INTERVIEWS



Companies with 100 to 499 employees
81 INTERVIEWS



Companies with 500 employees and more
58 INTERVIEWS

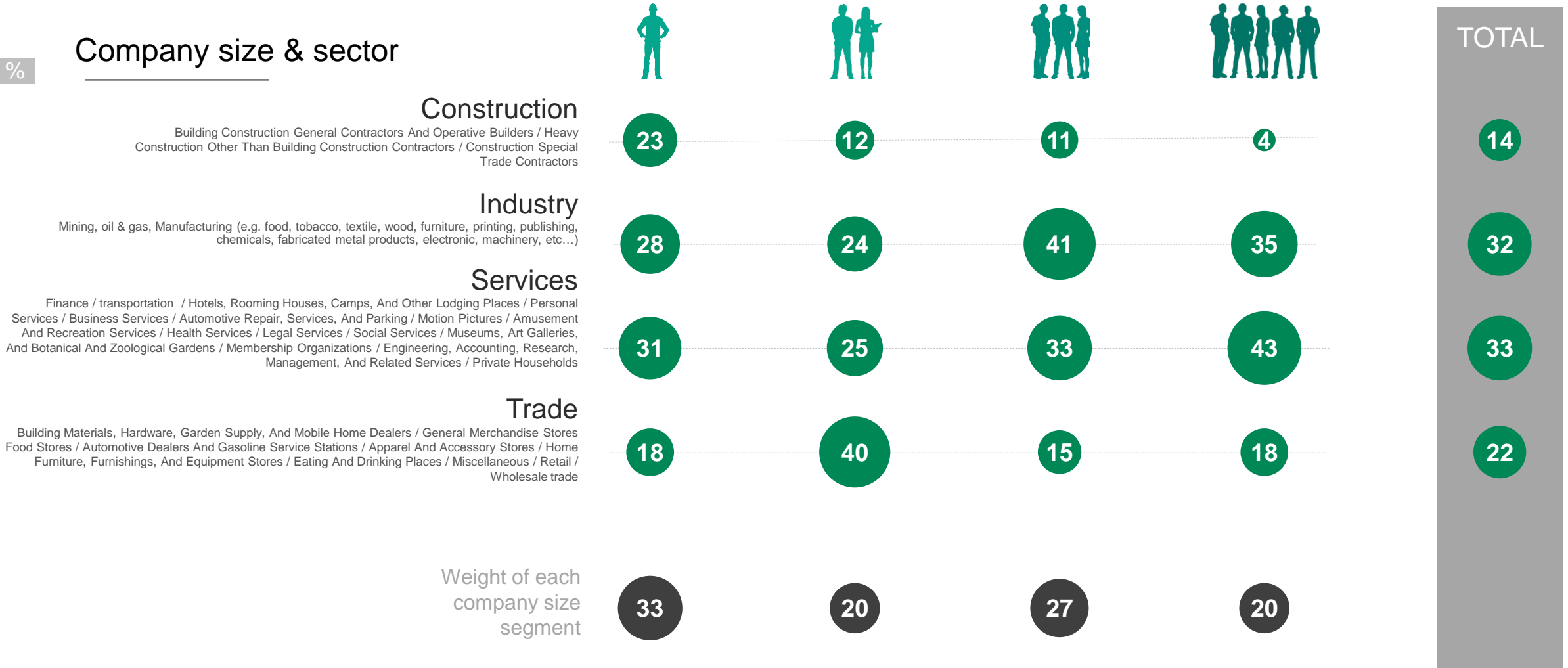


SAMPLE STRUCTURE IN SWITZERLAND



In %

Company size & sector



This sample structure was set up in order to be roughly representative of the number of companies for each activity sector and size based on the number of employees as well as to allow comparisons between countries on a similar basis. In the following slides, no additional weighting of the data are applied to company sizes or activity sectors segments.

MOBILITY ALTERNATIVES LIST AND DEFINITIONS



CORPORATE CAR SHARING:

where 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 : where several employees travel in the same car to the same destination (Bolt, Faxe)



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

2

EXECUTIVE SUMMARY



SWISS FLEET MANAGERS STAY OPTIMISTIC FOR THE FUTURE OF THEIR FLEETS, DESPITE A UNCERTAIN CONTEXT

#1

CONFIDENCE FOR THE FUTURE, ALONG WITH CAUTIOUSNESS

- **Fleet managers show a good level of confidence regarding the future of their fleets : almost the totality of them anticipate a stability or an increase of their fleet.**
- **This optimism mainly relies on an anticipation of business development, which ranks as the first reason for fleet size increase.**
- **However, signs of prudence appear as well : vehicle possession length is increasing, due to the global context (inflation, semi-conductor shortage, delivery delays...)**

#2

EVEN IF OPERATING LEASING IS NOT A MAJOR FINANCING METHOD YET, IT SHOWS POTENTIAL FOR DEVELOPMENT

- **Operating Leasing is the main fleet financing method for 13% of companies currently.**
- **However, it could develop in the future: almost 1 company out of 4 (22%) plans to either introduce or develop it in the next 3 years, especially smaller companies.**

- **With regards to telematics, the level of use in Swiss companies is in line with Europe : 30% vs 33% for Europe, with a higher use in larger companies.**

FULL-SERVICE LEASING GAINS STRONG POPULARITY

13%

of companies in Switzerland rely on full-service leasing as their main method of financing (doubling compared to 2020)

22%

of SMEs are planning to implement or expand

ALTERNATIVE TECHNOLOGIES ARE ALREADY A REALITY IN SWISS FLEETS, RAISING SPECIFIC CHALLENGES

#3

AN ADOPTION OF ALTERNATIVE TECHNOLOGIES IN LINE WITH EUROPE

- Swiss companies, like what is seen around Europe, are already well engaged into alternative technologies adoption : more than 4 out of 10 companies are already using at least one technology among Hybrid, Plug-in Hybrid or 100% BEV, consideration levels being also high.
- Those 3 technologies are each either used or considered by one third of the companies – similar levels as in Europe.
- Swiss companies appear to be very attached to CSR compliance, standing out as the main motivation, by far, to use alternative technologies (83%, much more than in the rest of Europe). Fuel expenses reduction, on the other hand, also ranks high, in a context of soaring energy prices globally.
- As the use of electrical vehicles is spreading, difficulties around charging points become more important : the access to charging points, whether they are public, at home or at work doesn't seem optimal yet.

- Moreover, the responsibility for charging points installation at employees' home differs among companies: some companies support it entirely, other help partially, whereas in about half of cases the cost is totally supported by drivers.
- In terms of alternative mobility solutions implementation, Swiss companies show similar levels as in Europe : those solutions are widely used already.

ALTERNATIVE DRIVE TECHNOLOGIES CONTINUE TO GAIN GROUND



4

out of 10

Companies have vehicles with alternative technologies*

2

out of 3

are considering alternative technologies*

* Hybrid, Plug-in Hybrid or BEV (pure electric vehicles with battery)

#4

COMPANIES ARE DEPLOYING MOBILITY SOLUTIONS AS AN ADD-ON TO COMPANY CAR FLEETS

- In terms of alternative mobility solutions implementation, Swiss companies show similar levels as in Europe : those solutions are widely used already.

ALTERNATIVE MOBILITY SOLUTIONS AND HOME OFFICES ARE GAINING GROUND



2
out of 3

Companies offer alternative mobility solutions*

3
out of 4

Companies are considering alternative mobility solutions*

* Alternative mobility solutions = combination of car, public transport and bicycle

3

WHAT ARE THE MAIN CHARACTERISTICS OF THE FLEETS?



FLEET PROFILE



MOBILITY POLICY CHANGE DUE TO HOMWORKING



17%

changed the policy or
consider changing



13%



FLEET POSSESSION LENGTH

6.7



6.4

years



5.6



4.9

years



ANTICIPATED FLEET EVOLUTION

(% will remain stable or increase)

95%



93%



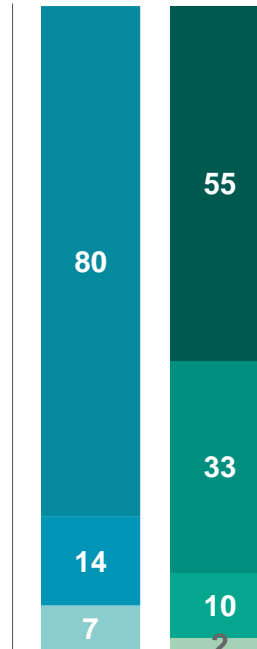
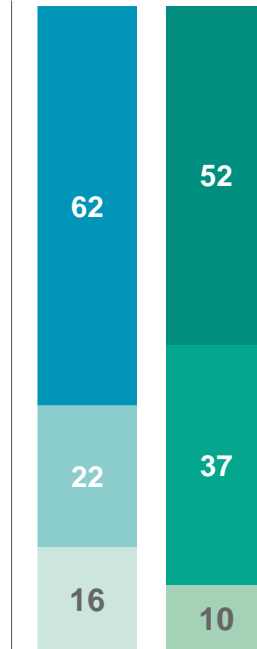
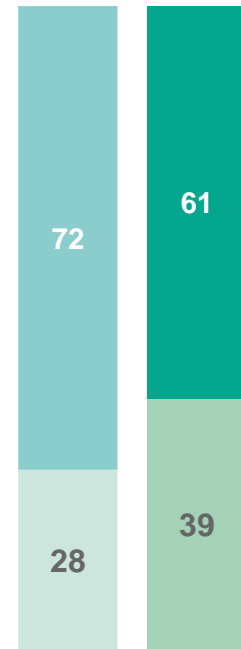
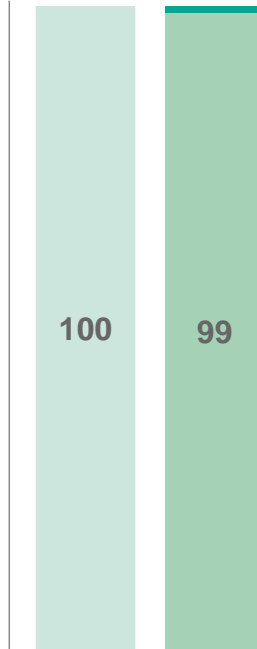
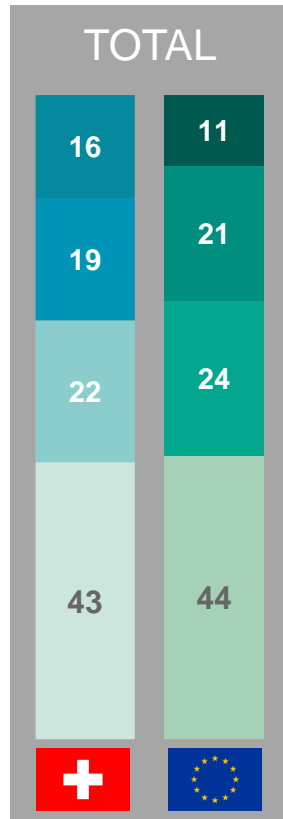
NUMBER OF VEHICLES IN FLEET

In %



Passenger cars + LCVs

- 1000 vehicles and more
- 100 to 999 vehicles
- 10 to 99 vehicles
- 1 to 9 vehicles

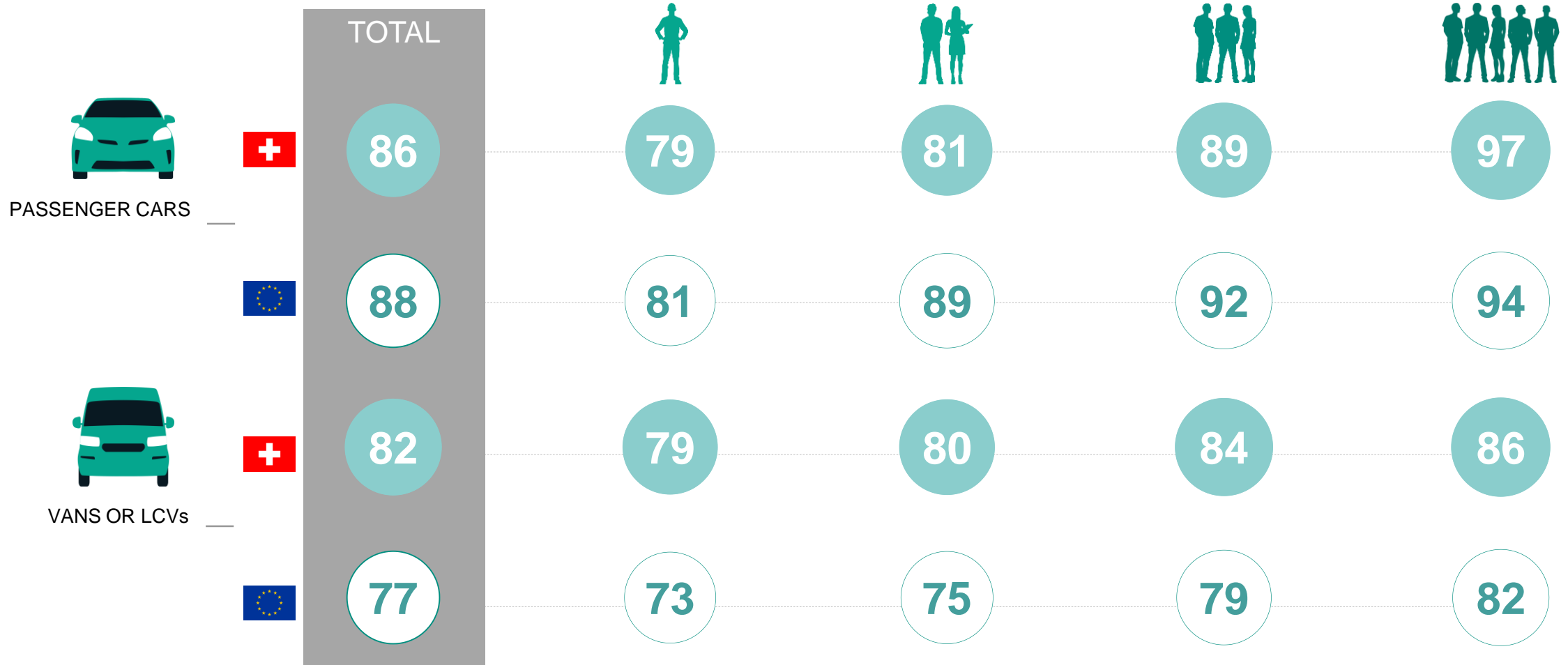


Can you please tell us the total number of vehicles of less than 3.5 tons in your fleet?
Basis: companies with corporate vehicles = 100%

PROPORTION OF COMPANIES WITH AT LEAST ONE PASSENGER CAR OR ONE LCV

(among companies with at least one vehicle in fleet)

In %



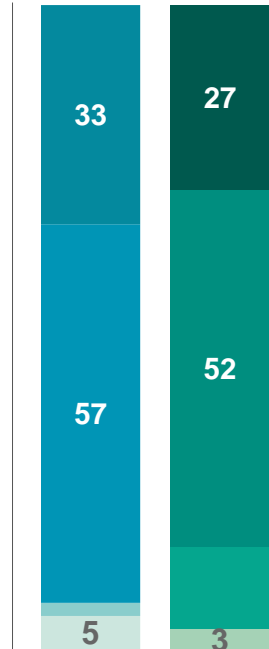
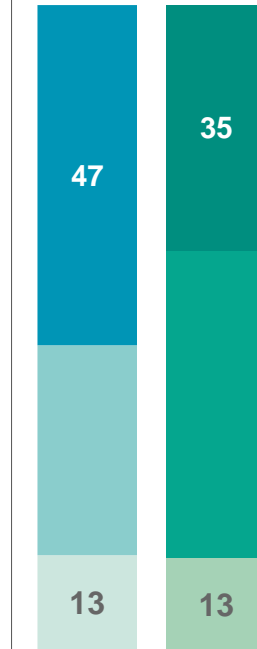
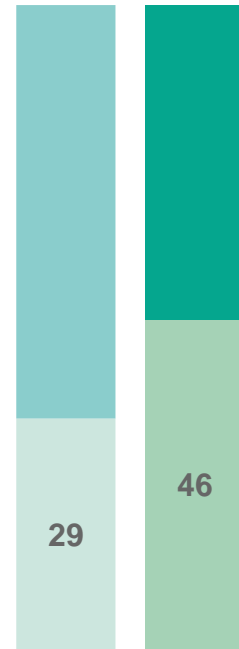
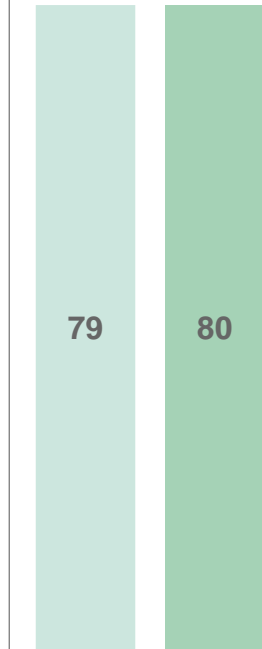
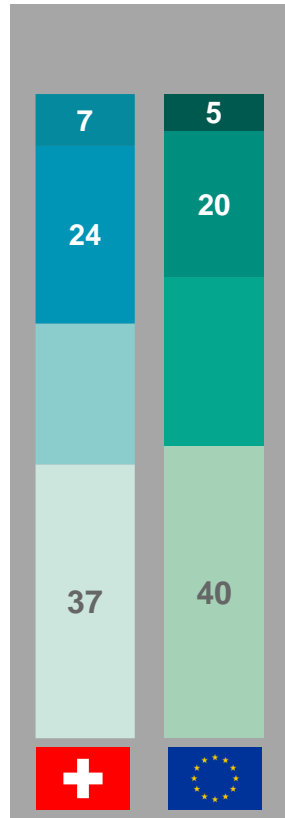
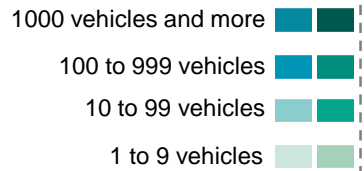
And can you please tell us the total number of cars in your fleet? / And can you please tell us the total number of LCVs or vans in your fleet?
Basis: companies with corporate vehicles = 100%

NUMBER OF PASSENGER CARS IN FLEET

In %



Passenger cars



And can you please tell us the total number of passenger cars in your fleet?
Basis: companies with corporate vehicles = 100%

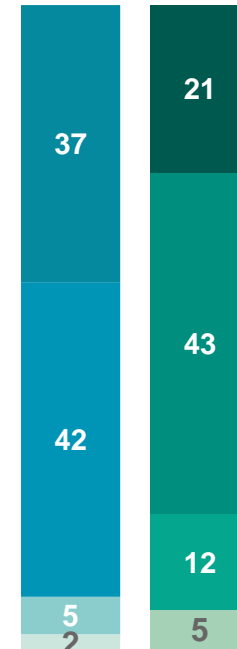
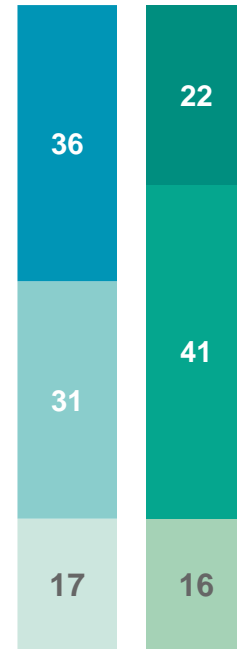
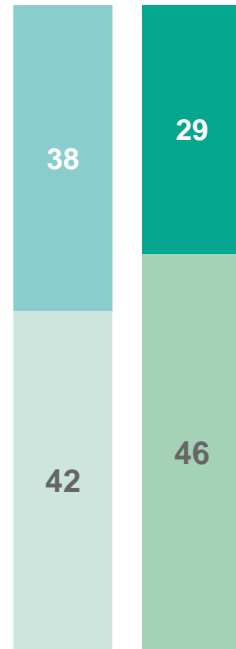
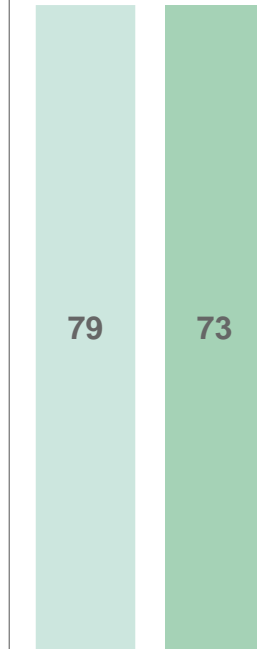
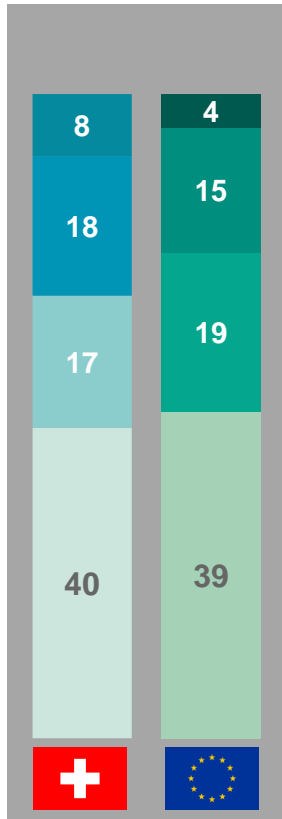
NUMBER OF LCVS IN FLEET

In %



LCVs

- 1000 vehicles and more
- 100 to 999 vehicles
- 10 to 99 vehicles
- 1 to 9 vehicles

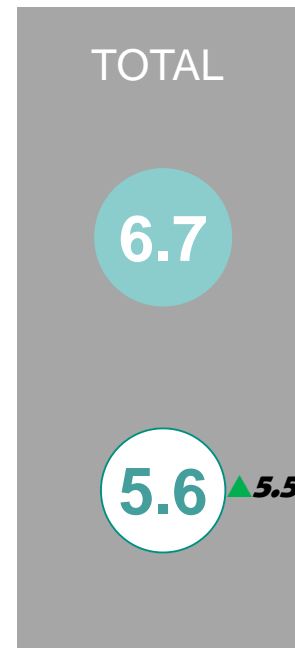
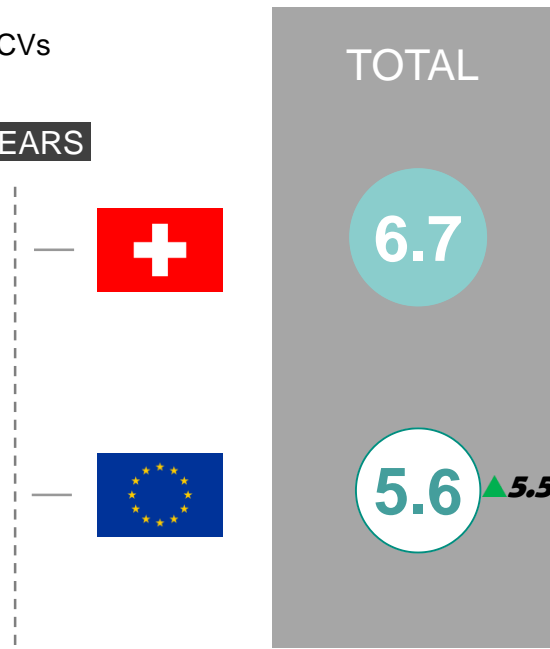


And can you please tell us the total number of LCVs or vans in your fleet?
Basis: companies with corporate vehicles = 100%

VEHICLES POSSESSION LENGTH



AVERAGE IN YEARS

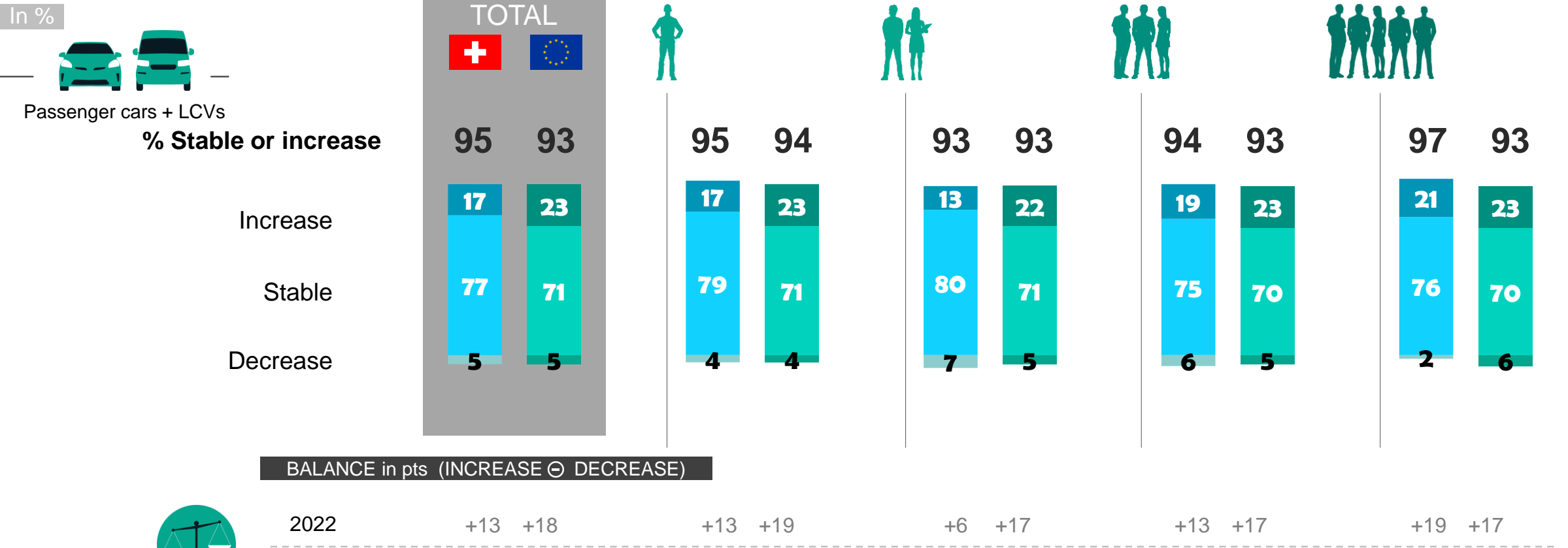


On average, how long do you keep your vehicles (before being sold or giving back to the leasing company)?
Basis: companies with corporate vehicles = 100%

FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Switzerland, 95% of the companies declare that in the next 3 years their company fleet will remain stable or increase.



In the next three years, do you think that the total number of vehicles in your company fleet will increase, decrease or remain the same?
Basis: companies with corporate vehicles = 100%

REASONS FOR FUTURE FLEET INCREASE

In %

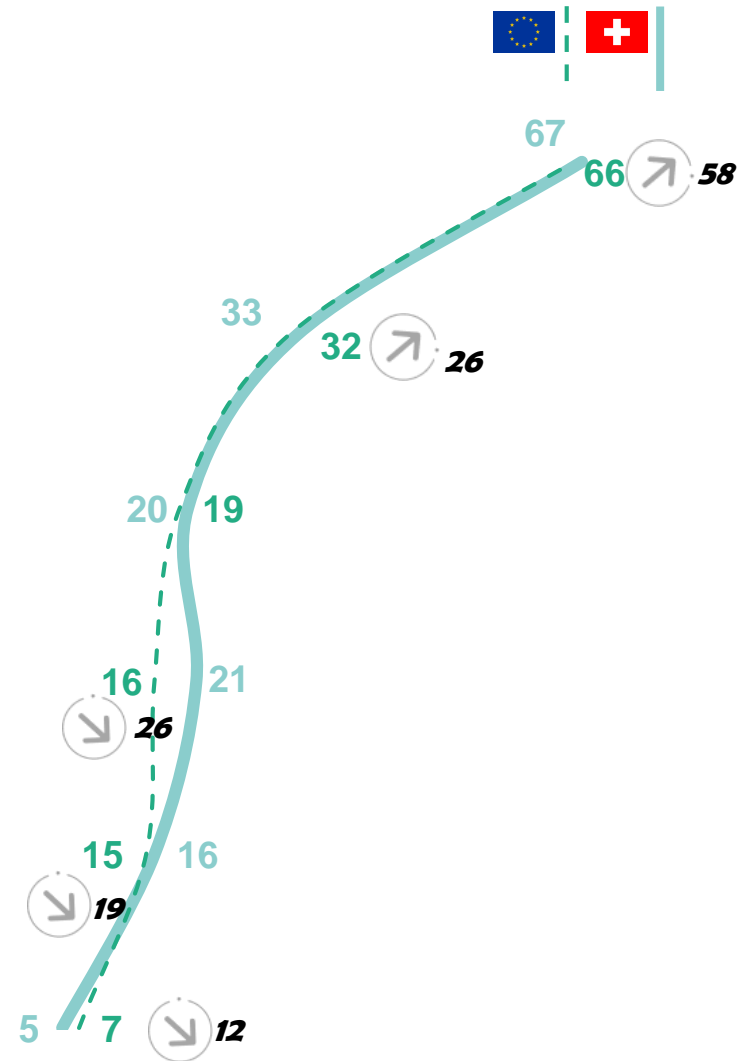


Passenger cars + LCVs

Because of HR related needs like talent recruitment, retaining of employees etc.

To provide a safe commute to your employees due to COVID-19

Because of tax decreases



Because your company is growing or developing a new activity that requires company vehicles

Your company plans to propose vehicles to employees with no company car eligibility (e.g. salary exchange/sacrifice)

Your company plans to propose shared vehicles to employees (car sharing)

Why do you think the total number of vehicles in your company fleet will increase?
Basis: companies expecting an increase of the fleet

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

In %

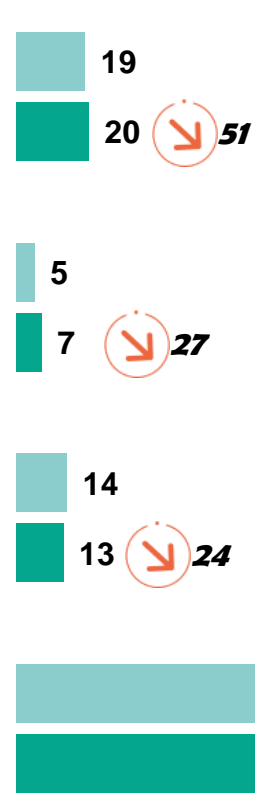


Passenger cars + LCVs

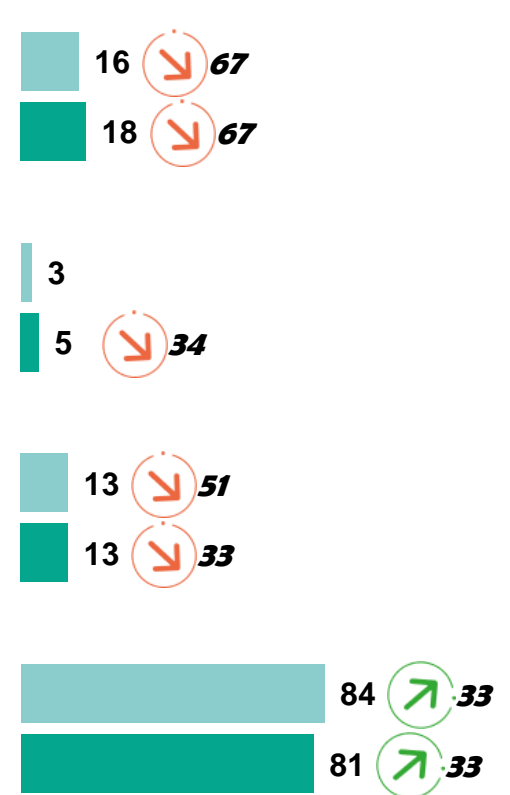
NET YES
(totally + partially)



+



+



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

MOBILITY POLICY ADAPTATION COINCIDING WITH HOMEWORKING

HOW TO READ THE RESULTS ?

In Switzerland, among the companies that changed or consider changing their mobility policy, 22% have already changed the company car policy in terms of mileage or models.

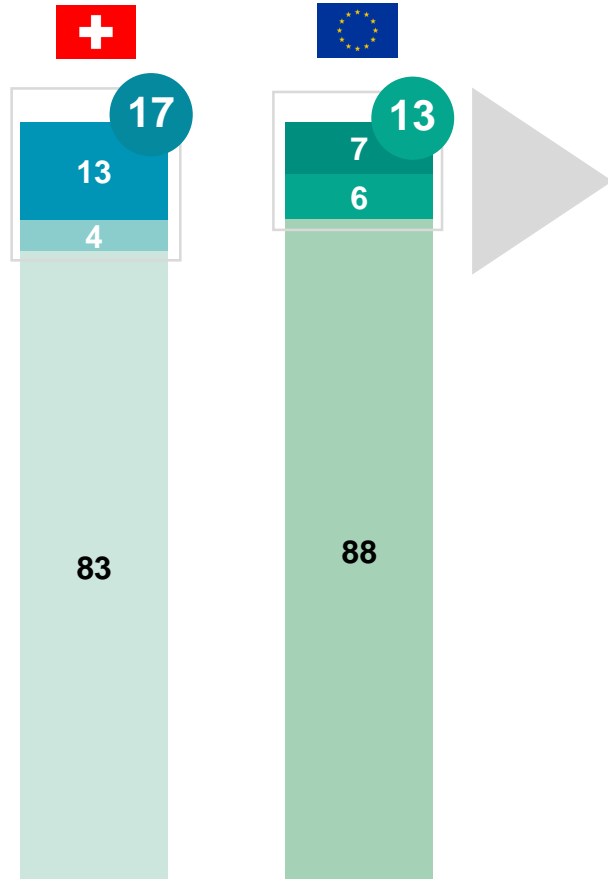
In %



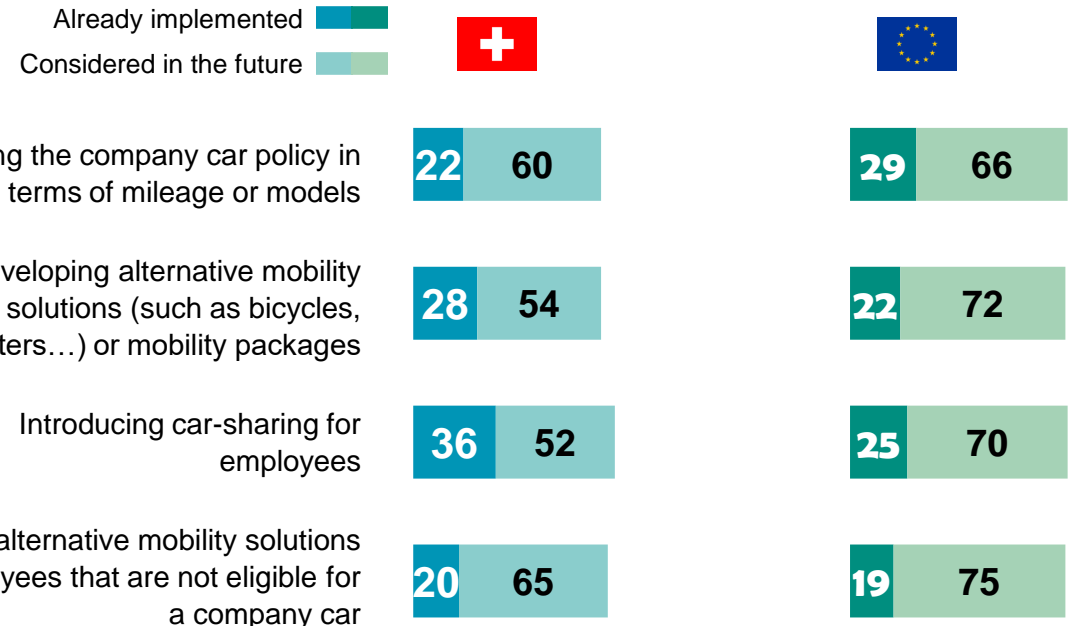
Passenger cars + LCVs

NET CHANGED THE POLICY OR CONSIDER CHANGING

- Yes, we have already changed our mobility/fleet policy ■
- Yes, we are considering changing our mobility/fleet policy ■
- No, we haven't changed nor consider changing anything due to homeworking ■



Basis: companies with corporate vehicles = 100%



Basis: companies that have changed or consider changing their mobility policy with regards to homeworking

With regards to the development of homeworking, have you changed, or do you consider changing your mobility/fleet policy? And among the following changes, can you please select those you have implemented or consider implementing with regards to the development of homeworking?

AVERAGE ANNUAL MILEAGE PER VEHICLE

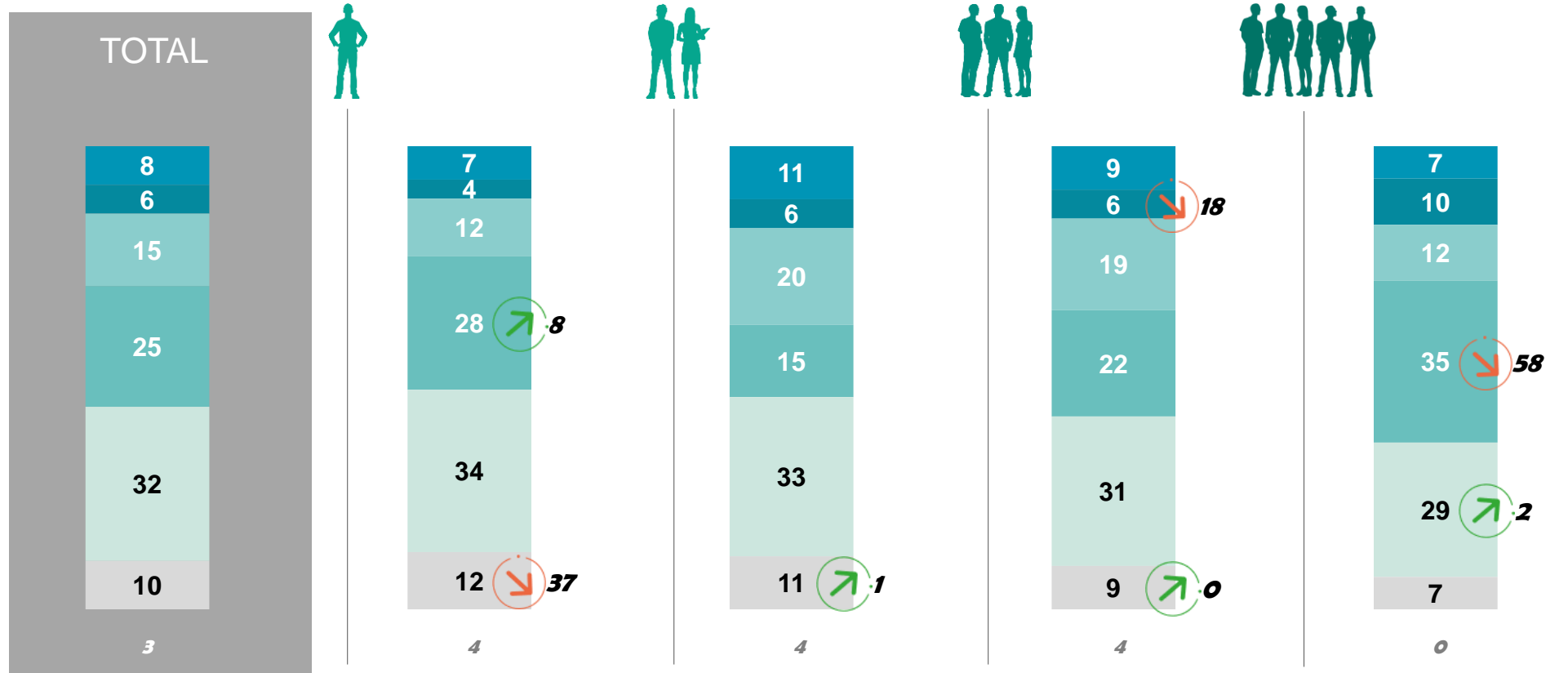
In %



Passenger cars + LCVs

- More than 50k
- 41k-50k
- 31k-40k
- 21k-30k
- 10k-20k
- Less than 10k

Don't know



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

TOTAL

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



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

4

HOW ARE COMPANIES FINANCING THEIR FLEET?



FINANCING



SELF PURCHASE

47% ▼ 59



CAR CREDIT

5%



OPERATING LEASING

13% ▲ 6



FINANCIAL LEASING

32%



MAIN FLEET FINANCING METHOD

In %

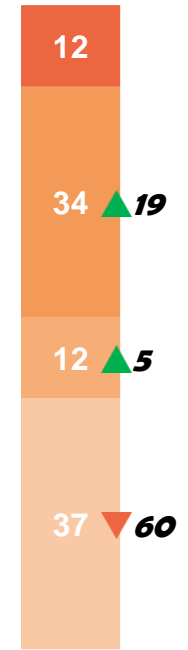
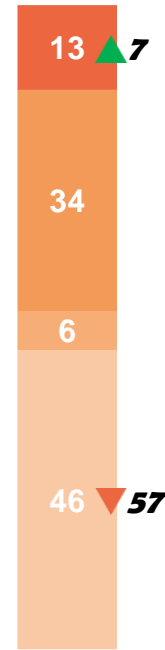
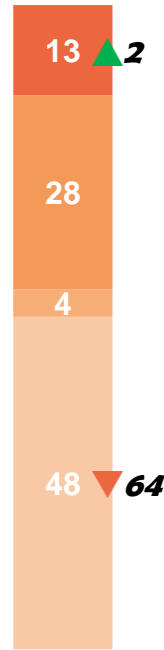
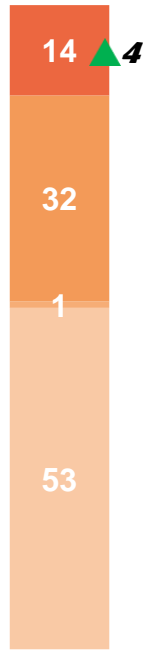
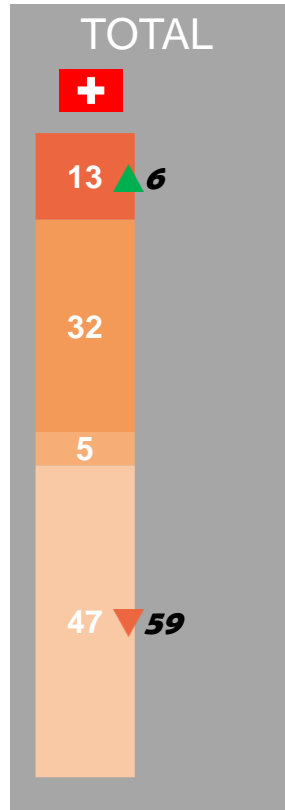


Passenger cars + LCVs

- Operating leasing ■
- Financial leasing ■
- Car credit ■
- Self purchase* ■

*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 FLEET FINANCING METHOD

Focus less than 10 employees

In %

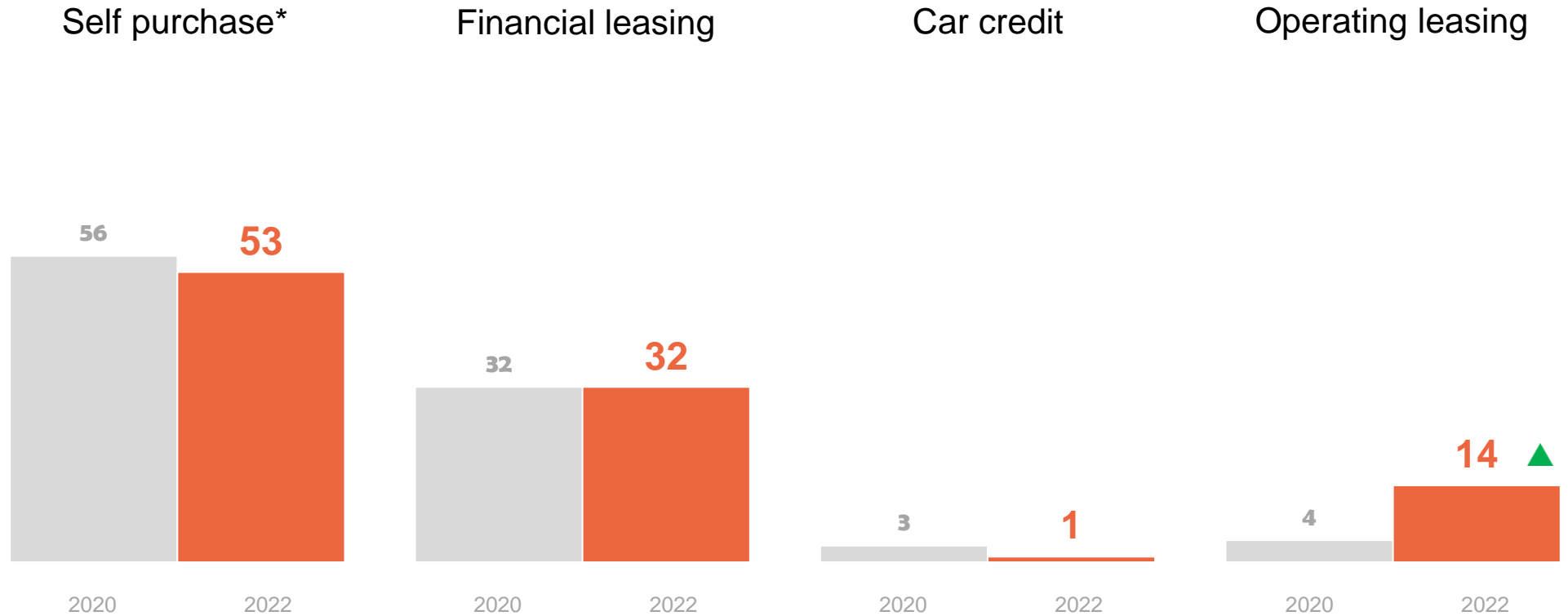


Passenger cars + LCVs



*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 FLEET FINANCING METHOD

Focus 10 to 99 employees

In %

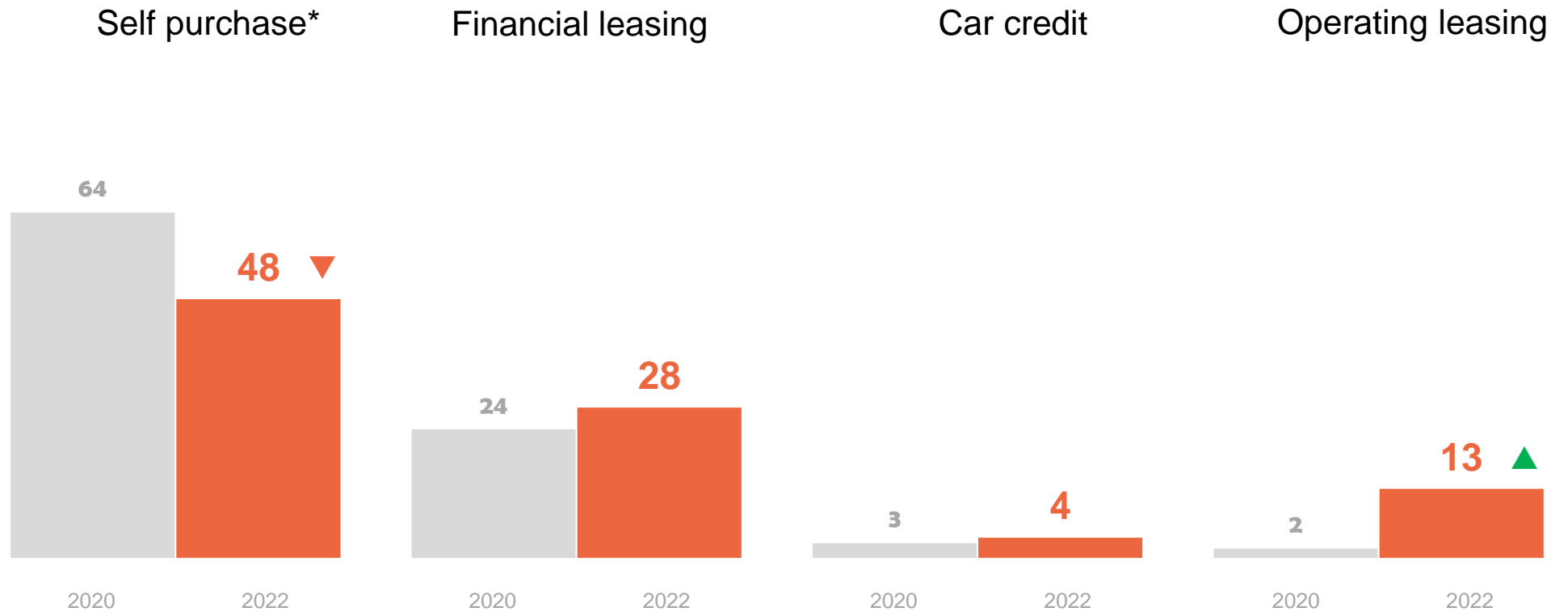


Passenger cars + LCVs



*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 FLEET FINANCING METHOD

Focus 100 to 499 employees

In %



Passenger cars + LCVs



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

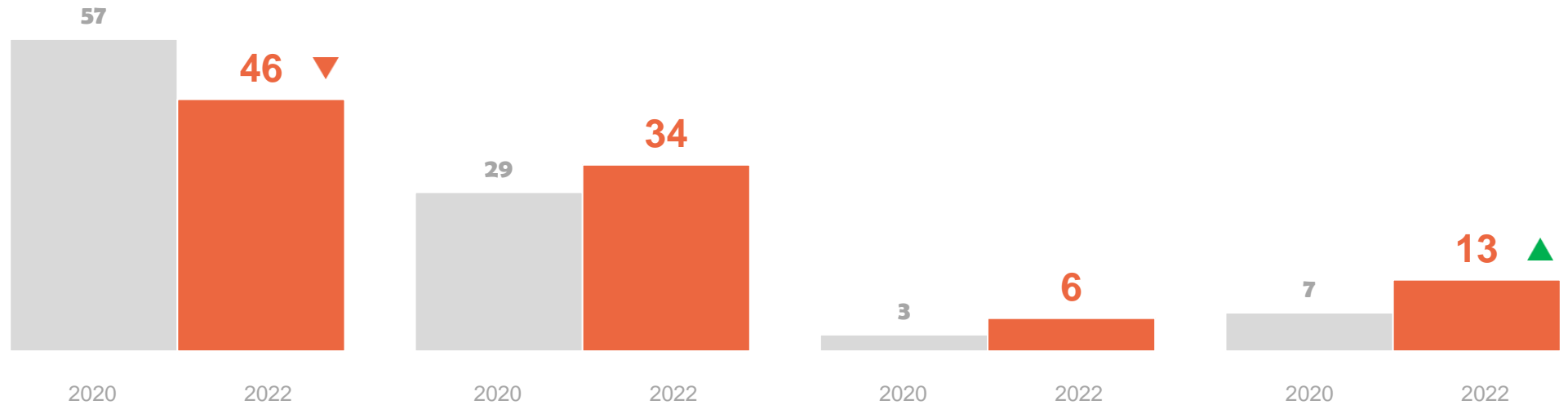
Data have been consolidated: 3 years average

Self purchase*

Financial leasing

Car credit

Operating leasing



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

EVOLUTION OF THE MAIN FLEET FINANCING METHOD

Focus 500 employees and more

In %

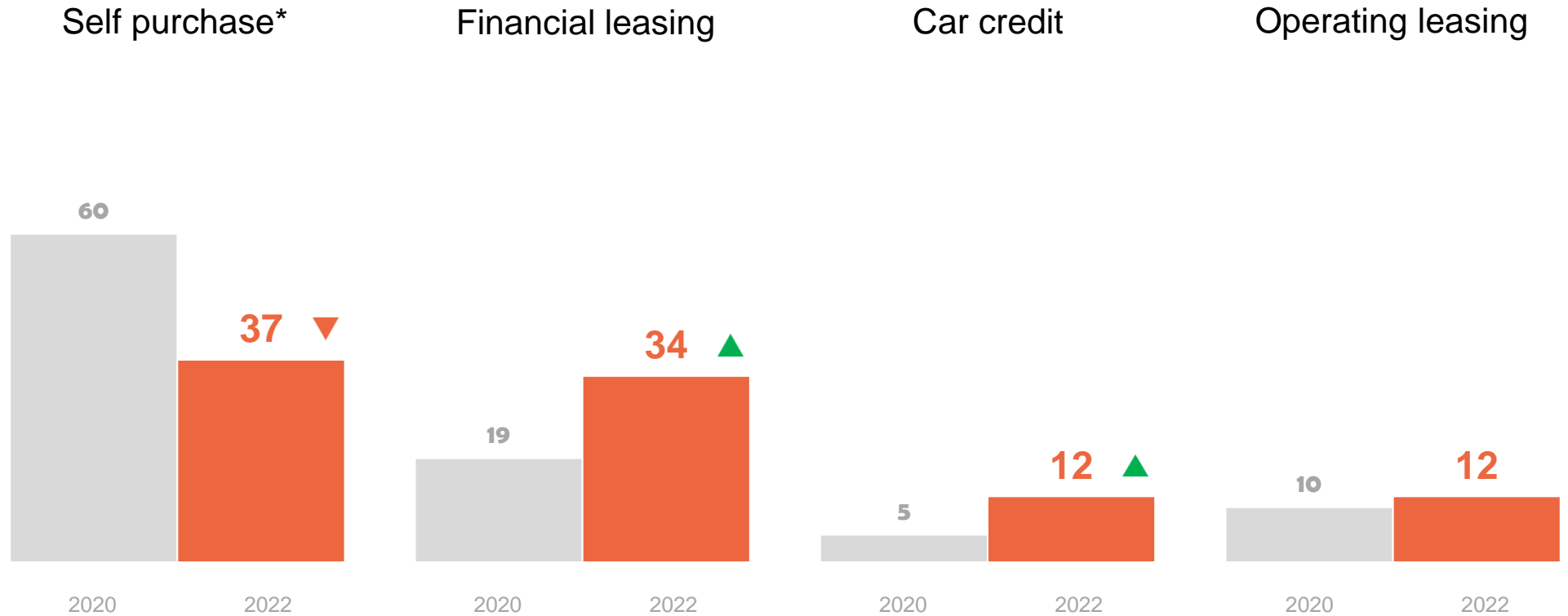


Passenger cars + LCVs



*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 FLEET FINANCING METHOD

Focus on 1 to 99

In %

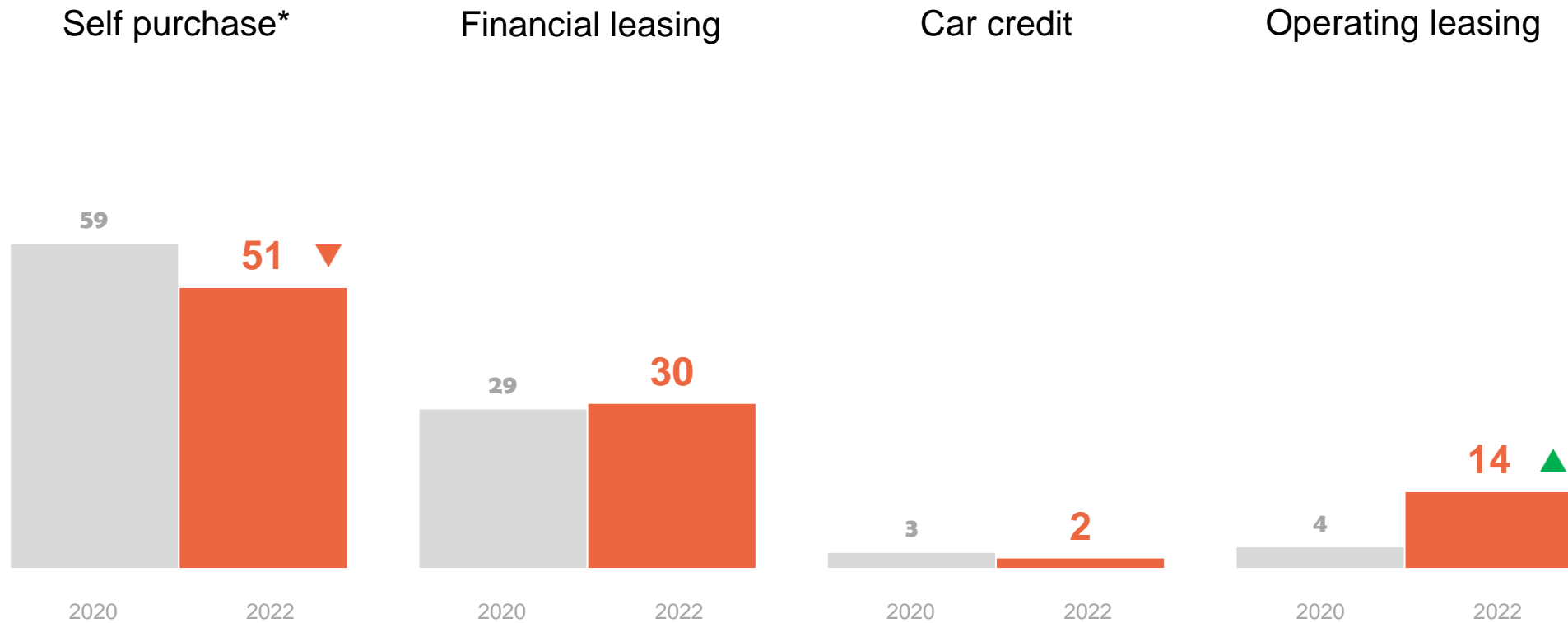


Passenger cars + LCVs



*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 FLEET FINANCING METHOD

Focus on 100 and more

In %



Passenger cars + LCVs



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

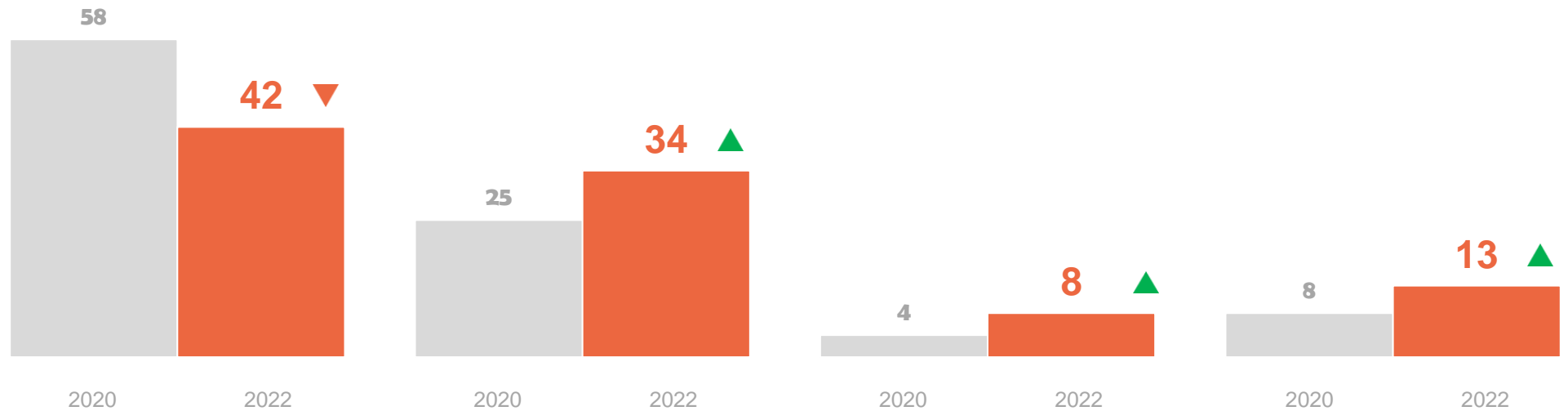
Data have been consolidated:
3 years average

Self purchase*

Financial leasing

Car credit

Operating leasing



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

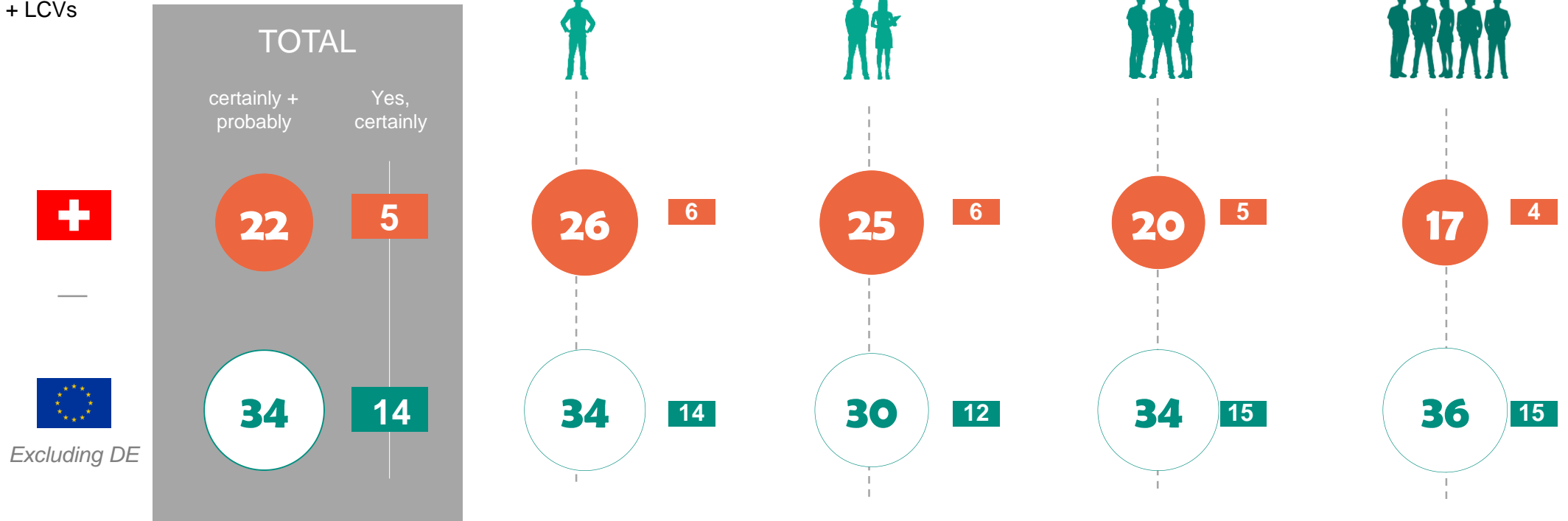
INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATING LEASING

Proportion of companies having the intention to increase the use of operating leasing

In %



Passenger cars + LCVs



*All countries except DE: 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%

5

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



ENERGY MIX



AT LEAST ONE ALTERNATIVE

IMPLEMENTED OR CONSIDERED*

for Passenger cars

EXPECTED PART OF 100%

ELECTRIC PASSENGER CAR IN 3 YEARS

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS



AT LEAST ONE ALTERNATIVE

IMPLEMENTED

for Passenger cars

EXPECTED PART OF 100%

ELECTRIC LCV IN 3 YEARS



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

EXPECTED SHARE OF PETROL OR DIESEL VEHICLES (IN 3 YEARS)

(Without Hybrid vehicles)

In %

HOW TO READ THE RESULTS ?

In Switzerland in the next 3 years, 60% of the companies passenger car fleet and 72% of the light commercial vehicle fleet will be petrol or diesel vehicles.



New question added in 2022

In your opinion, what percentage of your passenger car fleet will be either petrol or diesel vehicles in 3 years (please don't consider hybrid vehicles)?
 In your opinion, what percentage of your light commercial vehicle fleet will be either petrol or diesel vehicles in 3 years (please don't consider hybrid vehicles)?

Basis: companies with passenger cars / companies with LCVs

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

In %

HOW TO READ THE RESULTS ?

In Switzerland in the next 3 years, 25% of the companies passenger car fleet and 22% of the light commercial vehicle fleet will be 100% Battery Electric Vehicle.



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 among all types)

In %



Passenger cars



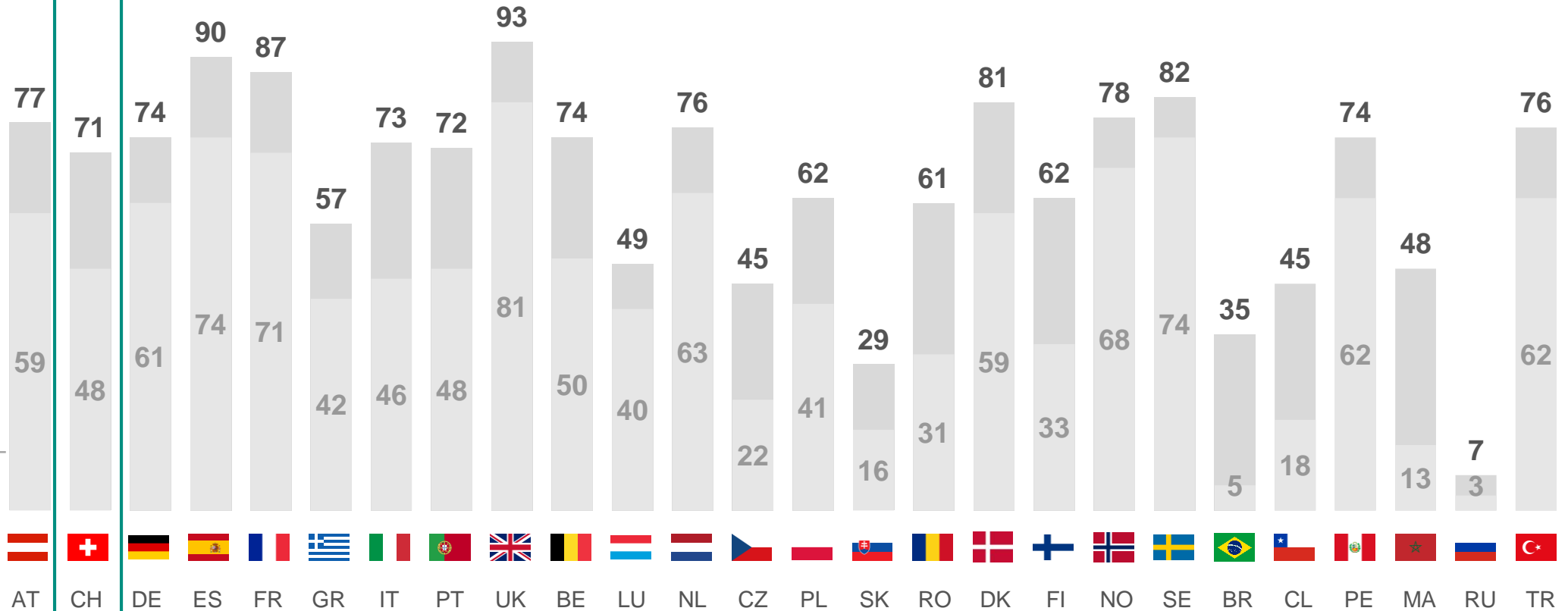
ALREADY USING
OR CONSIDER
USING IN THE
NEXT 3 YEARS



ALREADY
USING

HOW TO READ THE RESULTS ?

In Switzerland, 71% of the companies are already using or consider to implement at least one alternative technology in the next 3 years. 48% of the companies are currently using at least one.



*This question has been asked differently in 2021.

Amongst the following alternative fuel technologies, which ones do you currently use...?
Amongst the following alternative fuel technologies, which ones are you considering using...?

Basis: companies with passenger cars

CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES*

(At least one technology among HEV, PHEV and 100% BEV)

In %



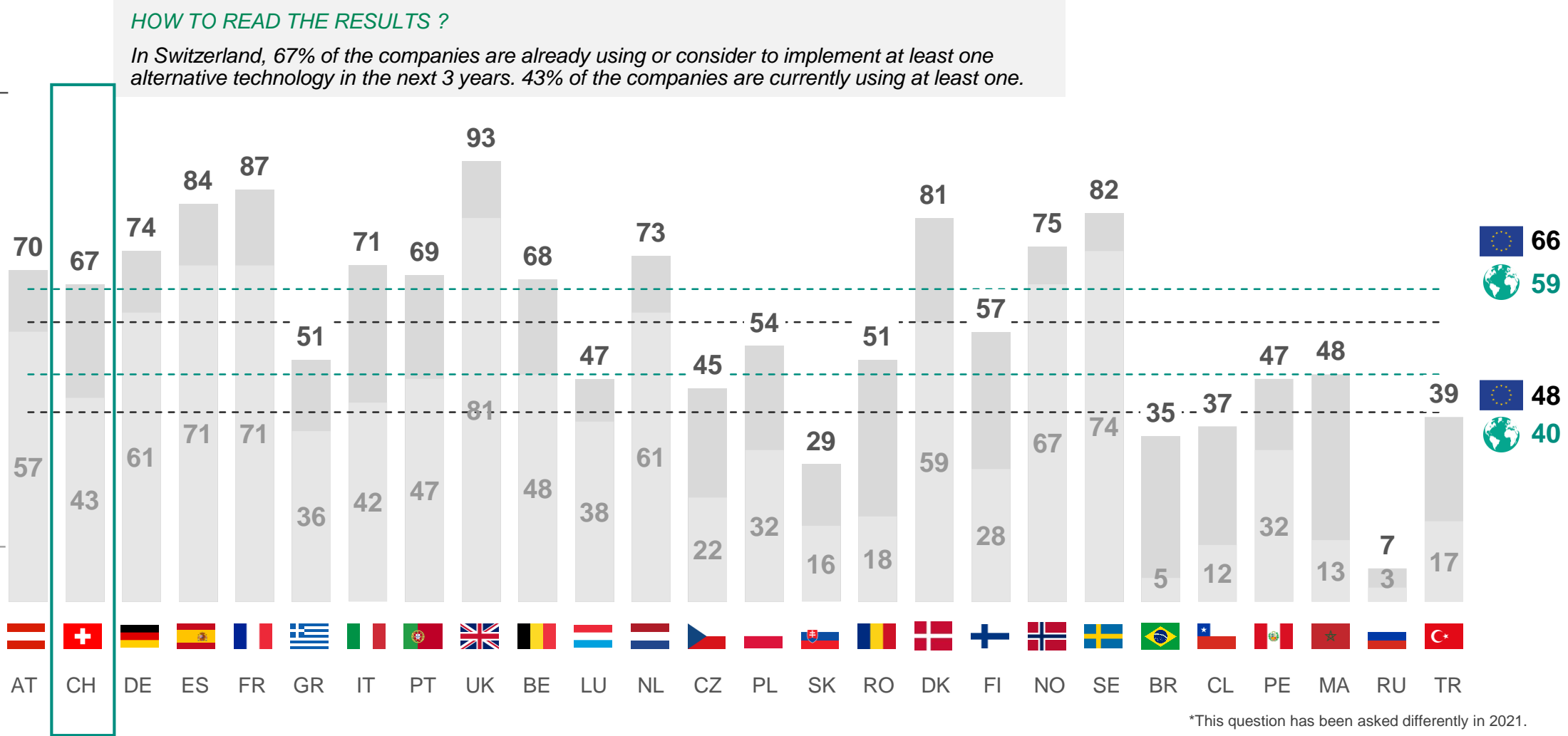
Passenger cars



ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS



ALREADY USING



*This question has been asked differently in 2021.

Amongst the following alternative fuel technologies, which ones do you currently use...?
 Amongst the following alternative fuel technologies, which ones are you considering using...?

Basis: companies with passenger cars
 44

CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES*

(At least one technology among all types)

In %

Passenger cars

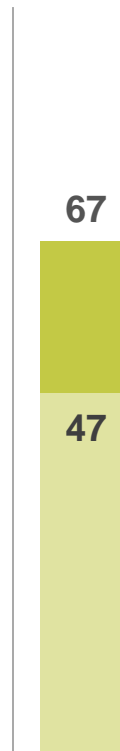
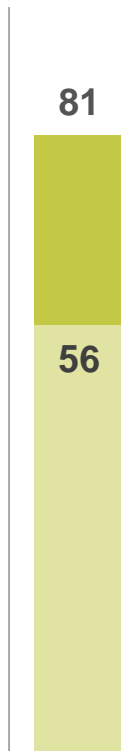
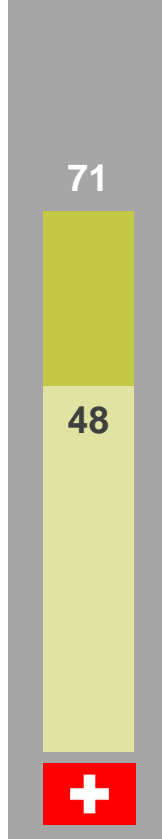


ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS



ALREADY USING

TOTAL



*This question has been asked differently in 2021.

Amongst the following alternative fuel technologies, which ones do you currently use...?
Amongst the following alternative fuel technologies, which ones are you considering using...?

Basis: companies with passenger cars

CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES*

(At least one technology among HEV, PHEV, 100% BEV)

In %

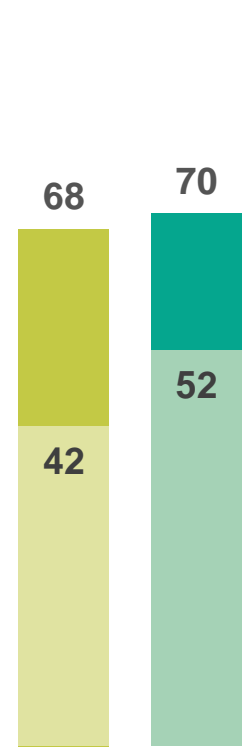
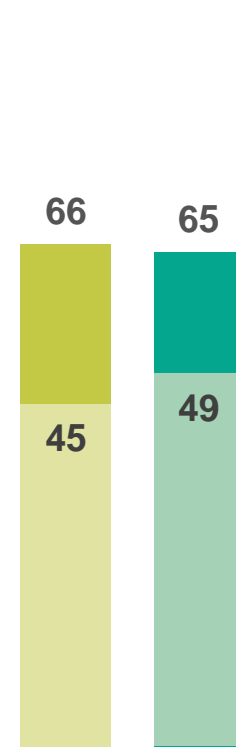
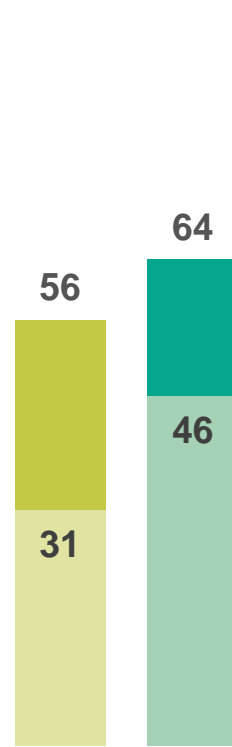
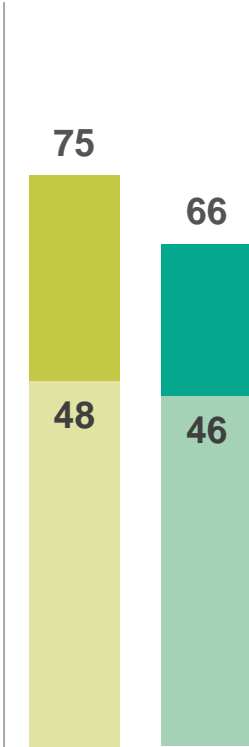
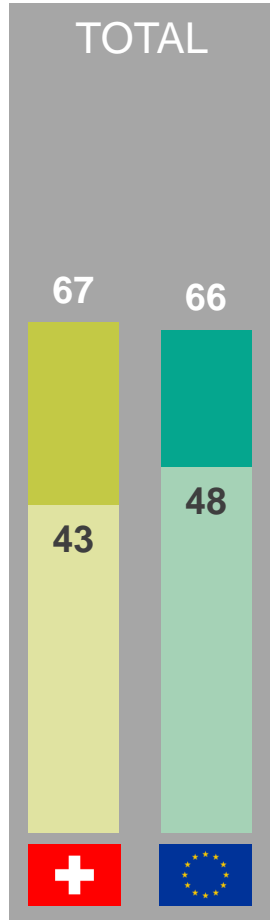
Passenger cars



ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS



ALREADY USING



*This question has been asked differently in 2021.

Amongst the following alternative fuel technologies, which ones do you currently use...?
Amongst the following alternative fuel technologies, which ones are you considering using...?

Basis: companies with passenger cars

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY*

Passenger car fleet

In %



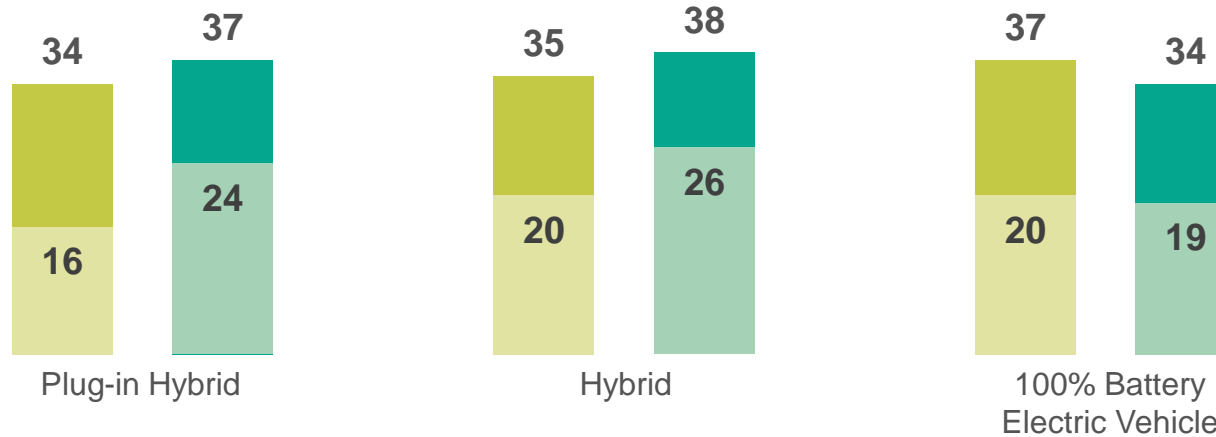
Passenger cars



ALREADY USING
OR CONSIDER
USING IN THE
NEXT 3 YEARS



ALREADY
USING



*This question has been asked differently in 2021.

Amongst the following alternative fuel technologies, which ones do you currently use...?
Amongst the following alternative fuel technologies, which ones are you considering using...?

Basis: companies with passenger cars

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY*

Passenger car fleet

In %



Passenger cars



ALREADY USING
OR CONSIDER
USING IN THE
NEXT 3 YEARS



ALREADY
USING



CNG*

Benchmark: AT, CH, ES, IT, PT,
BE, PL, GR, CL, PE, TK



Hydrogen*

Benchmark: AT, CH, DE, ES, BE,
LU, NL, PL, CL, PE

*This question has been asked differently in 2021.

REASONS FOR IMPLEMENTING OR CONSIDERING ALTERNATIVE FUEL TECHNOLOGIES

Passenger car fleet

In %



Passenger cars

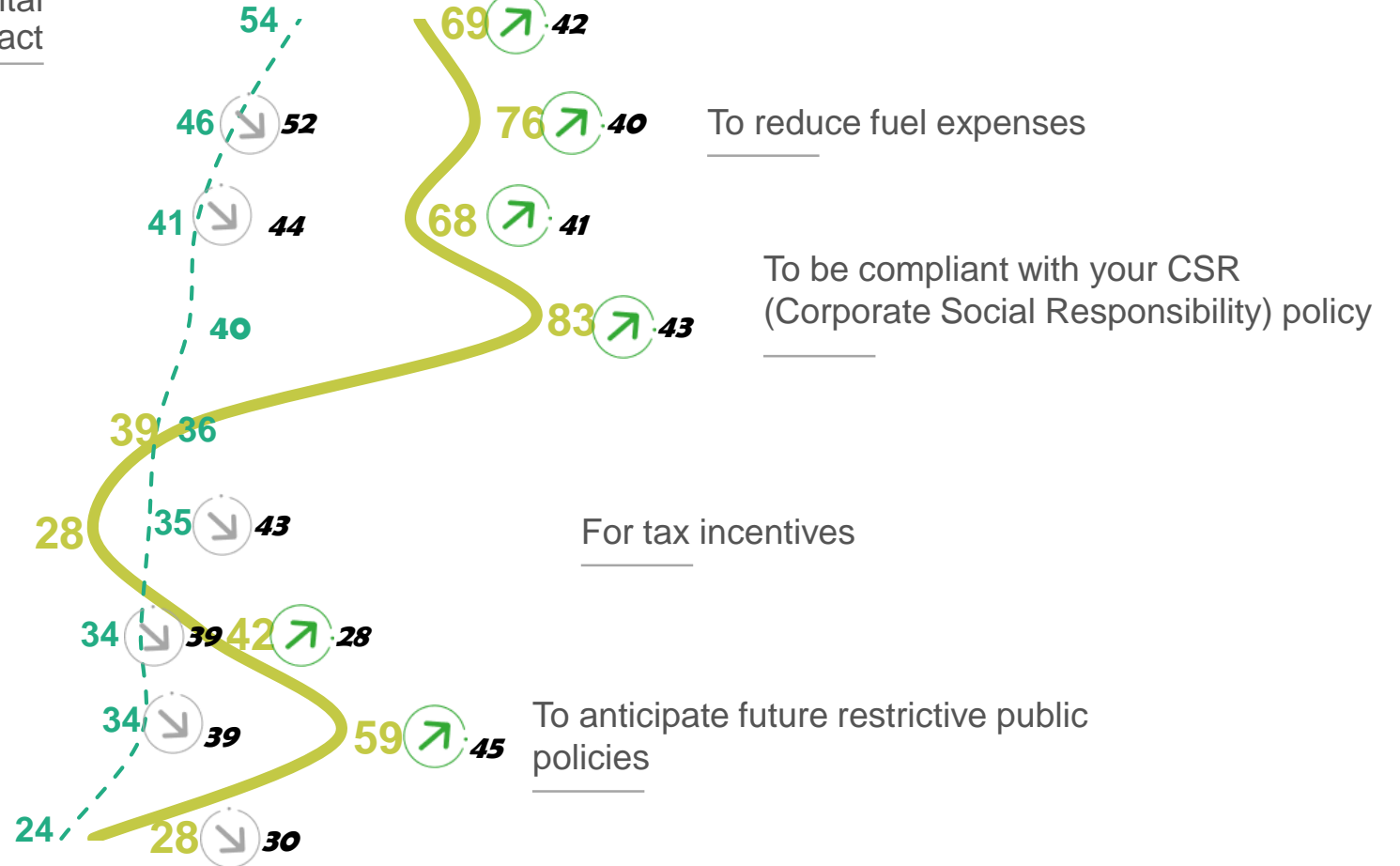
Because of their lower environmental impact

To improve your company image

Because their total cost of ownership is in line with or lower than petrol or diesel alternatives

To be able to drive in Low Emission Zone

To fulfil your employees' requests



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 for passenger cars

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY*

LCV Fleet

In %



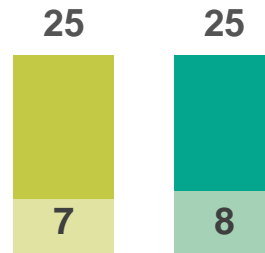
LCVs



ALREADY USING
OR CONSIDER
USING IN THE
NEXT 3 YEARS



ALREADY
IMPLEMENTED



100% Battery
Electric Vehicle

*This question has been asked differently in 2021.

Amongst the following alternative fuel technologies, which ones do you currently use...?
Amongst the following alternative fuel technologies, which ones are you considering using...?

Basis: companies with LCVs

REASONS FOR IMPLEMENTING OR CONSIDERING ALTERNATIVE FUEL TECHNOLOGIES

LCV fleet

In %



LCVs

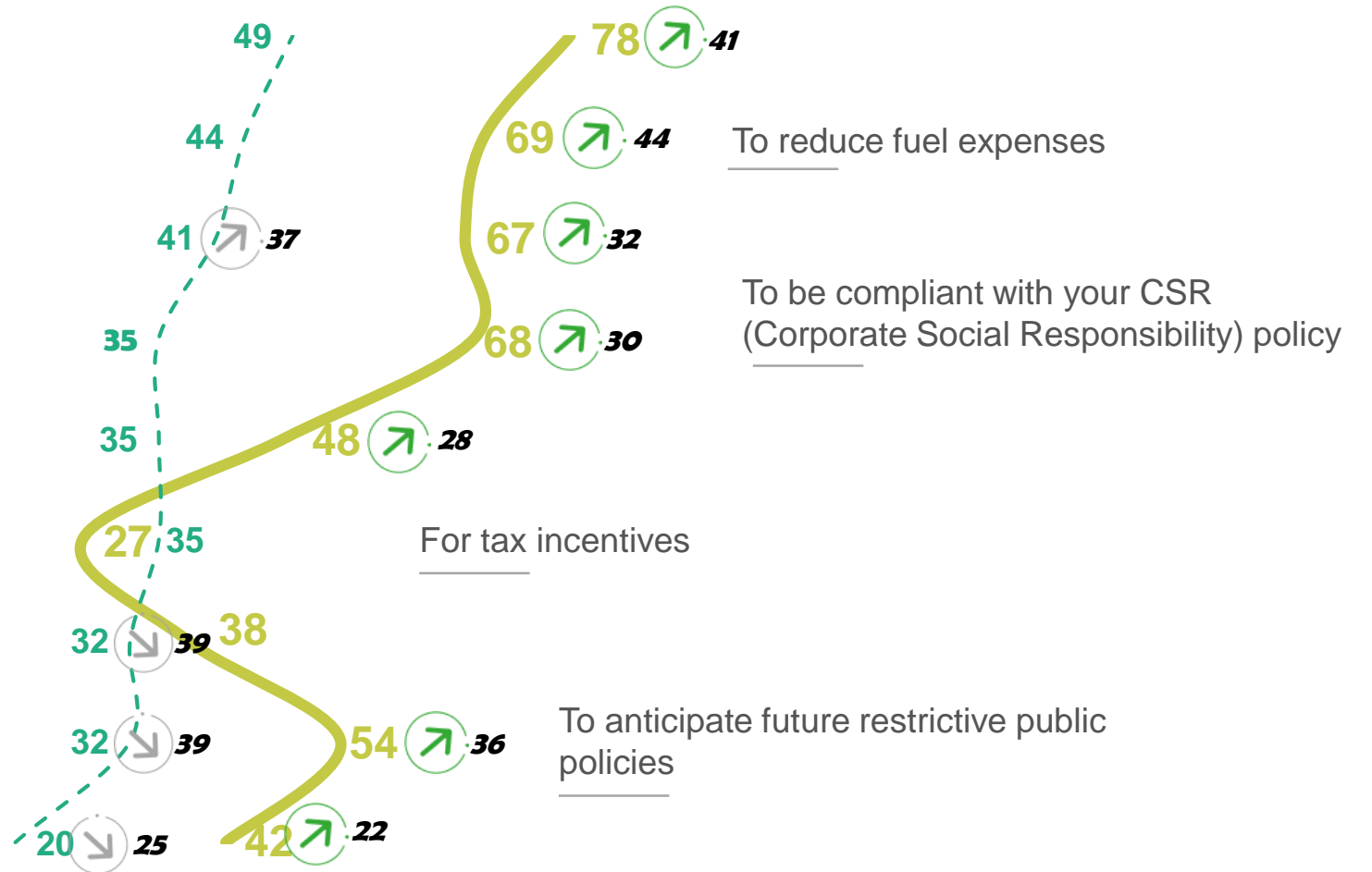
Because of their lower environmental impact

To improve your company image

Because their total cost of ownership is in line with or lower than petrol or diesel alternatives

To be able to drive in Low Emission Zone

To fulfil your employees' requests



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 for LCVs

5

ENERGY MIX FOCUS PER ALTERNATIVE TECHNOLOGY



HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY*

In %



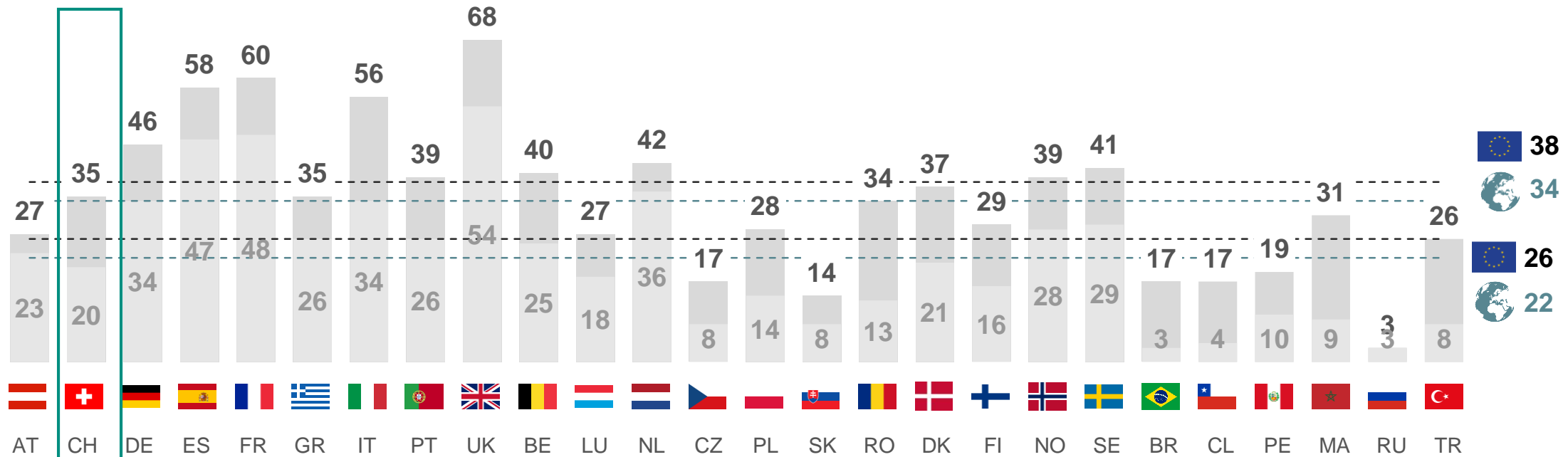
Passenger cars



ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS



ALREADY USING



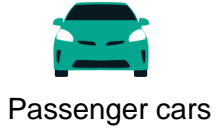
*This question has been asked differently in 2021.

Amongst the following alternative fuel technologies, which ones do you currently use...?
Amongst the following alternative fuel technologies, which ones are you considering using...?

Basis: companies with passenger cars
53

HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY*

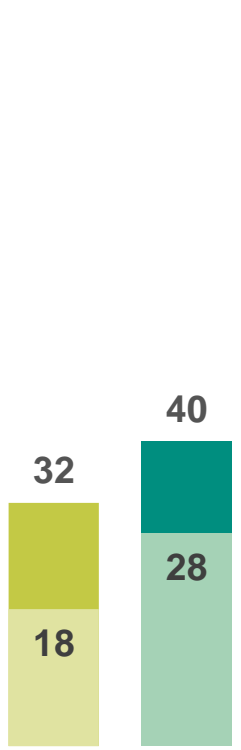
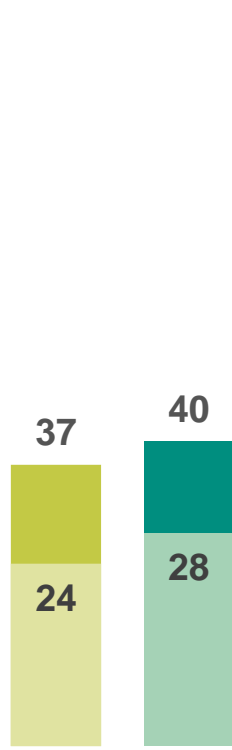
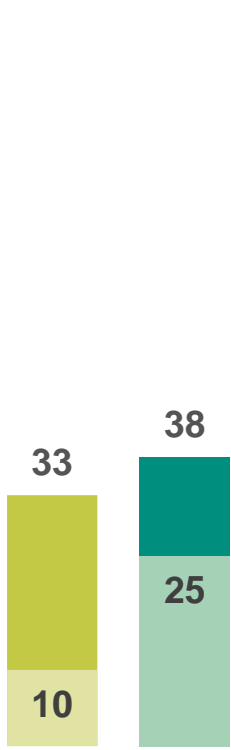
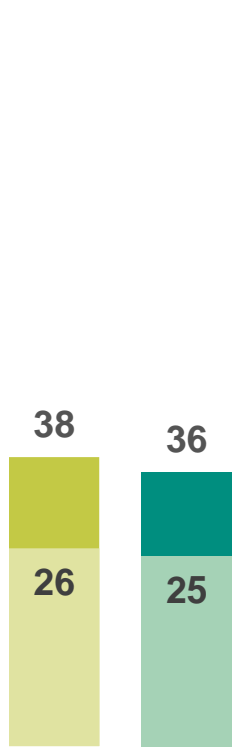
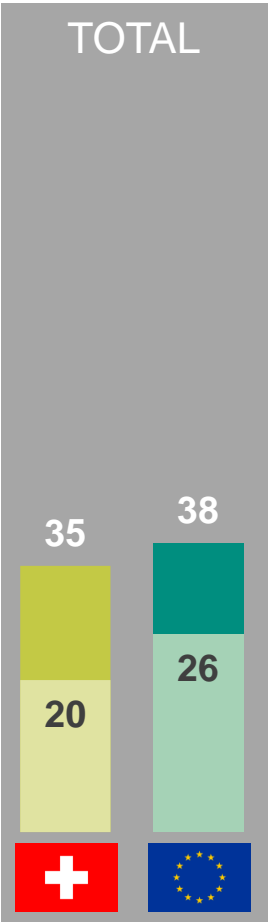
In %



ALREADY USING
OR CONSIDER
USING IN THE
NEXT 3 YEARS



ALREADY
USING



*This question has been asked differently in 2021.

Amongst the following alternative fuel technologies, which ones do you currently use...?
Amongst the following alternative fuel technologies, which ones are you considering using...?

Basis: companies with passenger cars

PLUG-IN HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY*

In %



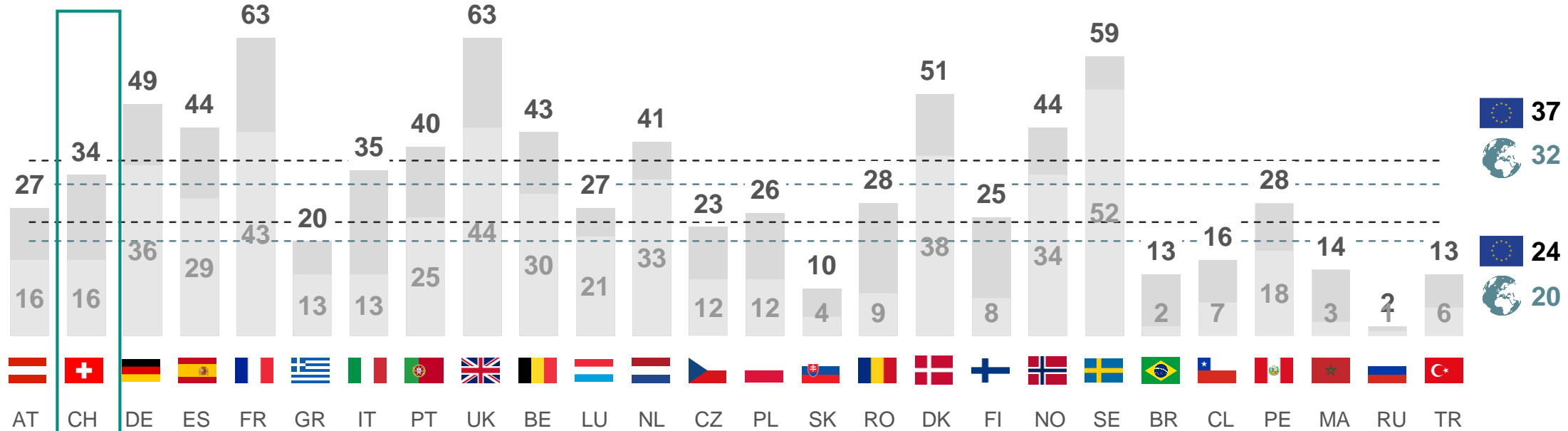
Passenger cars



ALREADY USING
OR CONSIDER
USING IN THE
NEXT 3 YEARS



ALREADY
USING



EU 37

World 32

EU 24

World 20

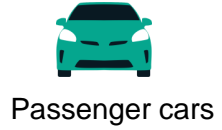
*This question has been asked differently in 2021.

Amongst the following alternative fuel technologies, which ones do you currently use...?
Amongst the following alternative fuel technologies, which ones are you considering using...?

Basis: companies with passenger cars

PLUG-IN HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY*

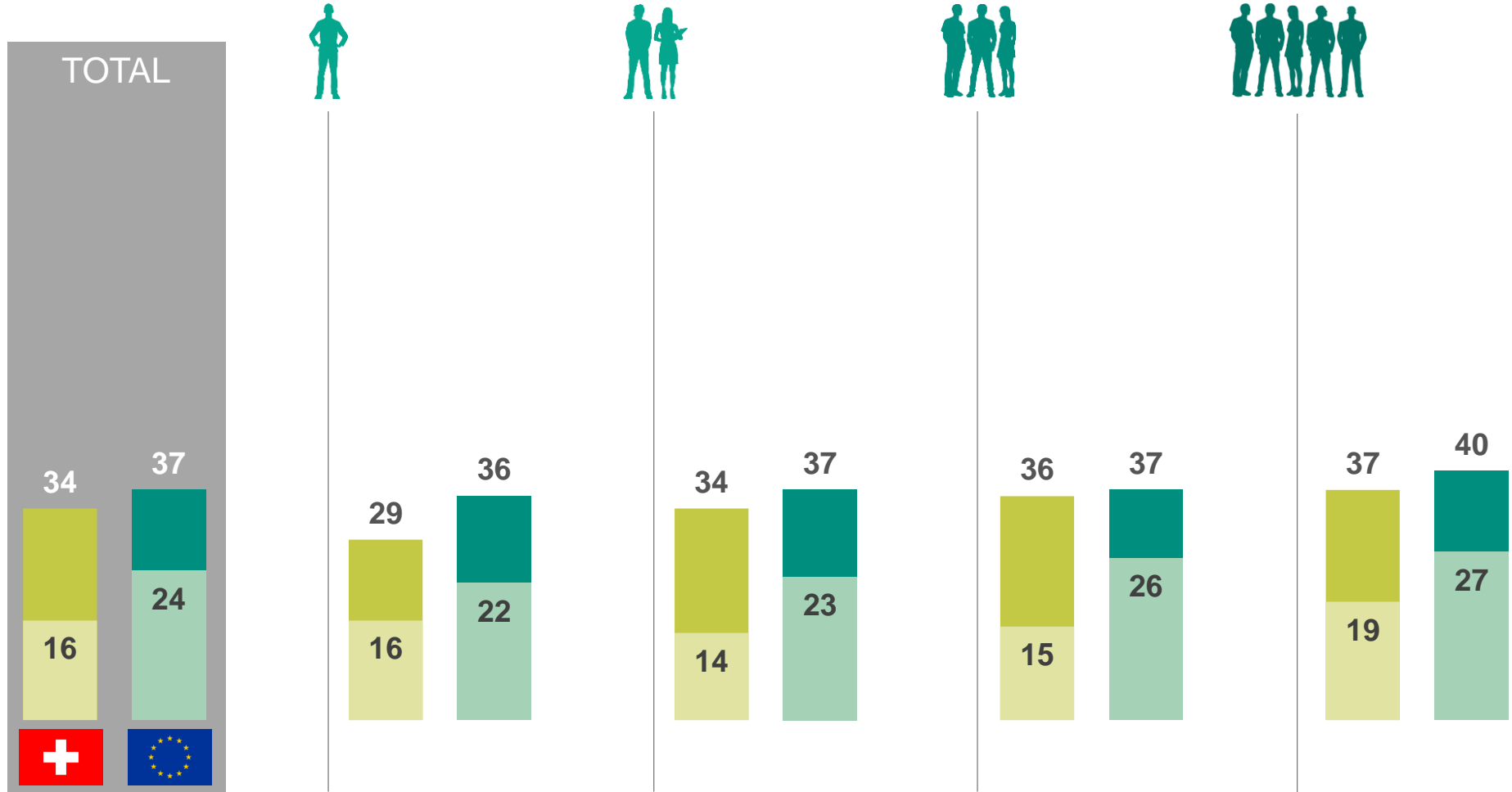
In %



ALREADY USING
OR CONSIDER
USING IN THE
NEXT 3 YEARS



ALREADY
USING



*This question has been asked differently in 2021.

Amongst the following alternative fuel technologies, which ones do you currently use...?
Amongst the following alternative fuel technologies, which ones are you considering using...?

Basis: companies with passenger cars

100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY*

In %



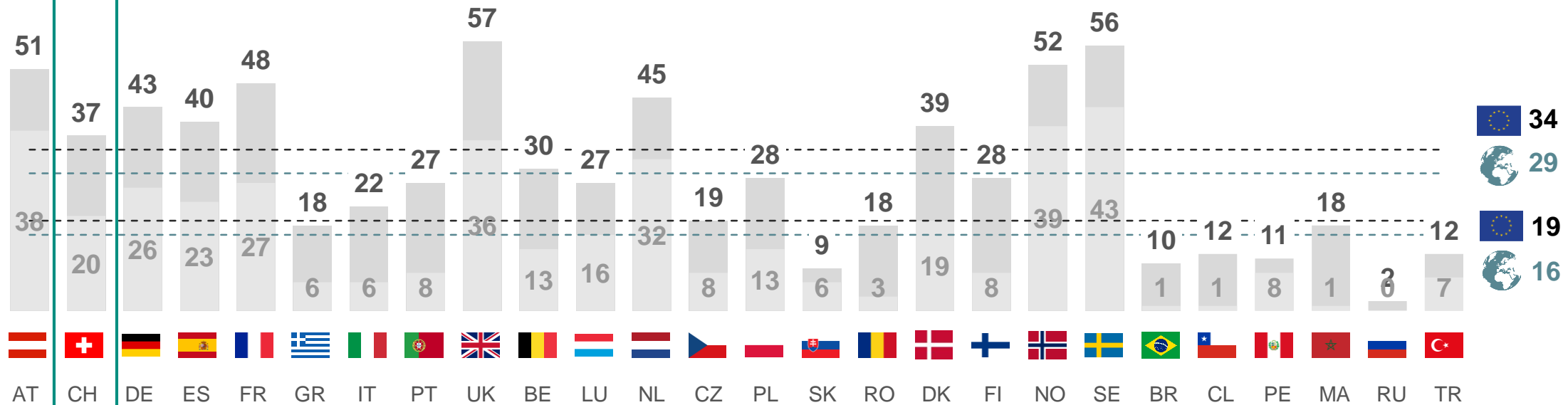
Passenger cars



ALREADY USING
OR CONSIDER
USING IN THE
NEXT 3 YEARS



ALREADY
USING



*This question has been asked differently in 2021.

Amongst the following alternative fuel technologies, which ones do you currently use...?
Amongst the following alternative fuel technologies, which ones are you considering using...?

Basis: companies with passenger cars
57

100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY*

In %

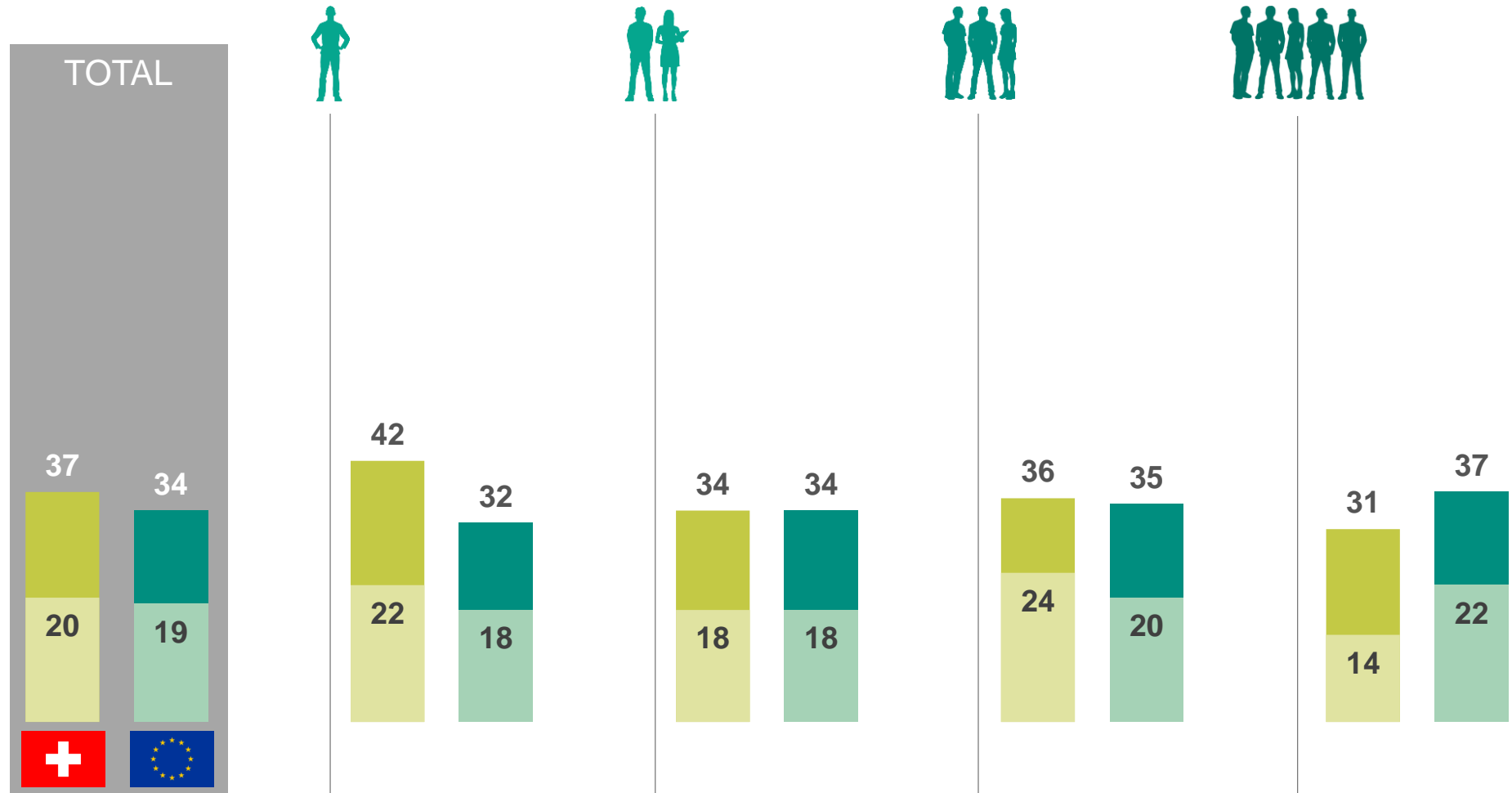
Passenger cars



ALREADY USING
OR CONSIDER
USING IN THE
NEXT 3 YEARS



ALREADY
USING



*This question has been asked differently in 2021.

Amongst the following alternative fuel technologies, which ones do you currently use...?
Amongst the following alternative fuel technologies, which ones are you considering using...?

Basis: companies with passenger cars

100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY*

In %



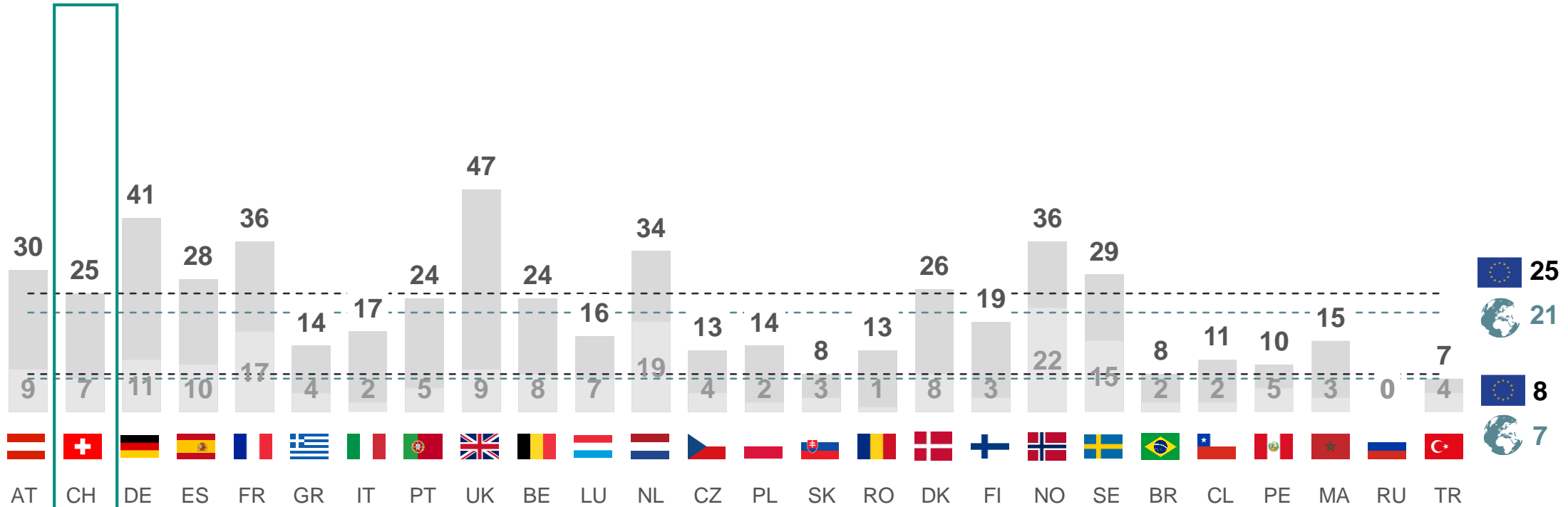
LCVs



ALREADY USING
OR CONSIDER
USING IN THE
NEXT 3 YEARS



ALREADY
USING

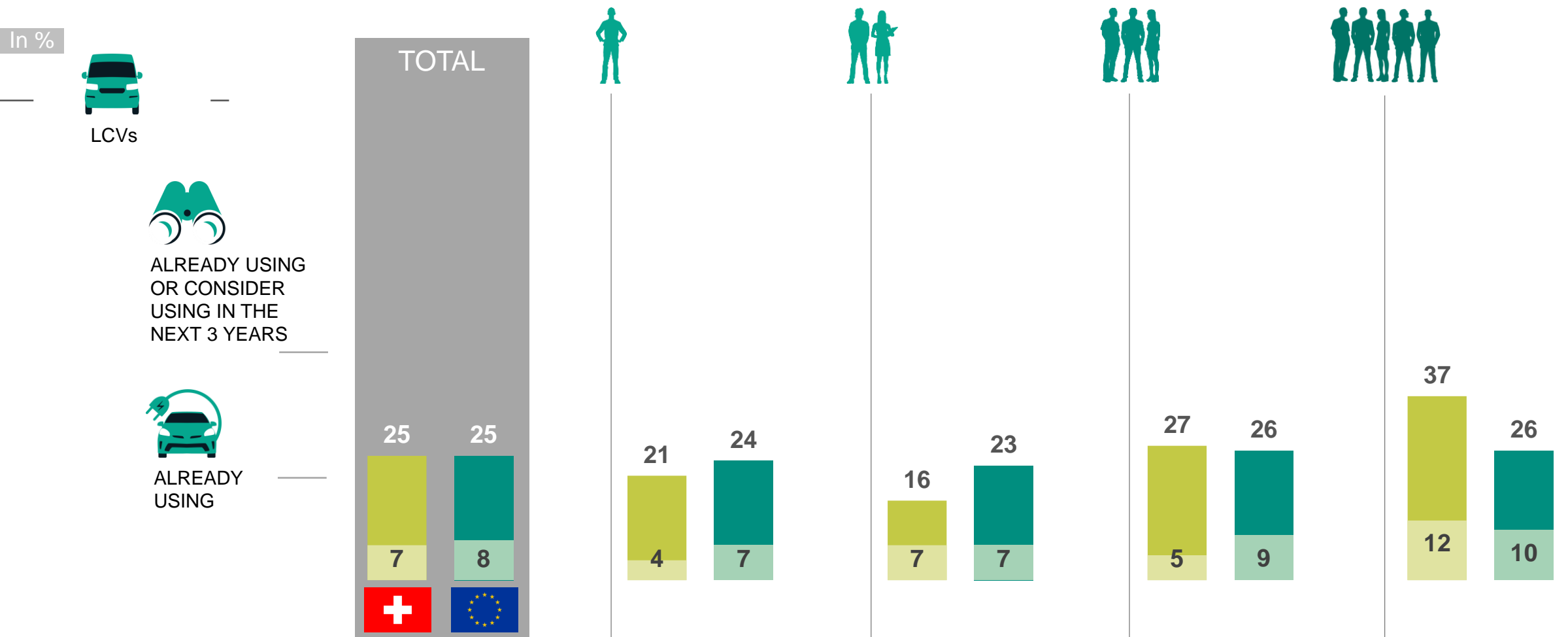


*This question has been asked differently in 2021.

Amongst the following alternative fuel technologies, which ones do you currently use...?
Amongst the following alternative fuel technologies, which ones are you considering using...?

Basis: companies with LCVs
59

100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY*



*This question has been asked differently in 2021.

Amongst the following alternative fuel technologies, which ones do you currently use...?
Amongst the following alternative fuel technologies, which ones are you considering using...?

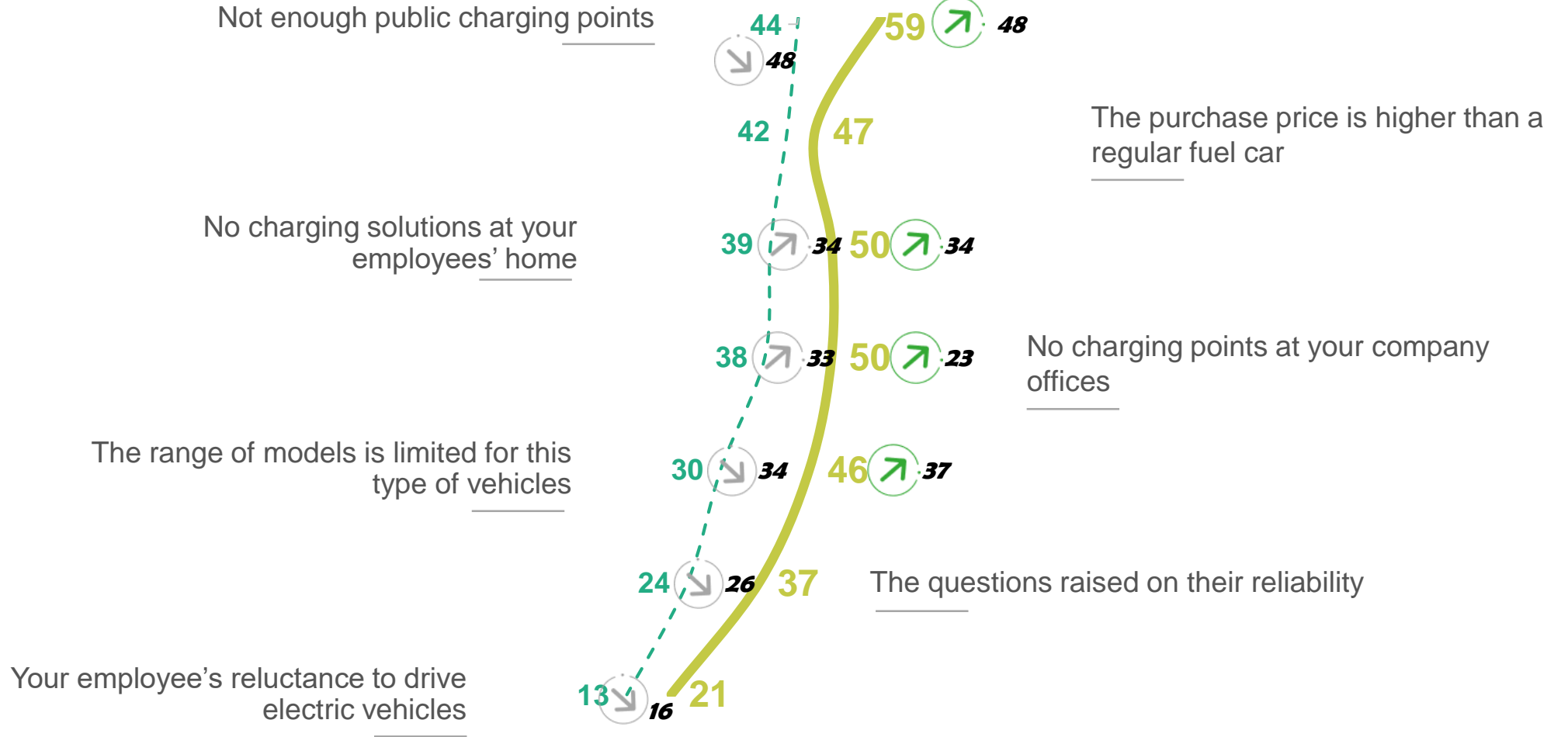
Basis: companies with LCVs

CONSTRAINTS OF 100% BATTERY ELECTRIC VEHICLE USAGE

In %



Passenger cars + LCVs



What are the constraints of using 100% Battery Electric vehicles?
 Basis: Know 100% BEV technology

CONSTRAINTS OF 100% BATTERY ELECTRIC VEHICLE USAGE

In %



Passenger cars + LCVs

do not consider implementing battery electric vehicles

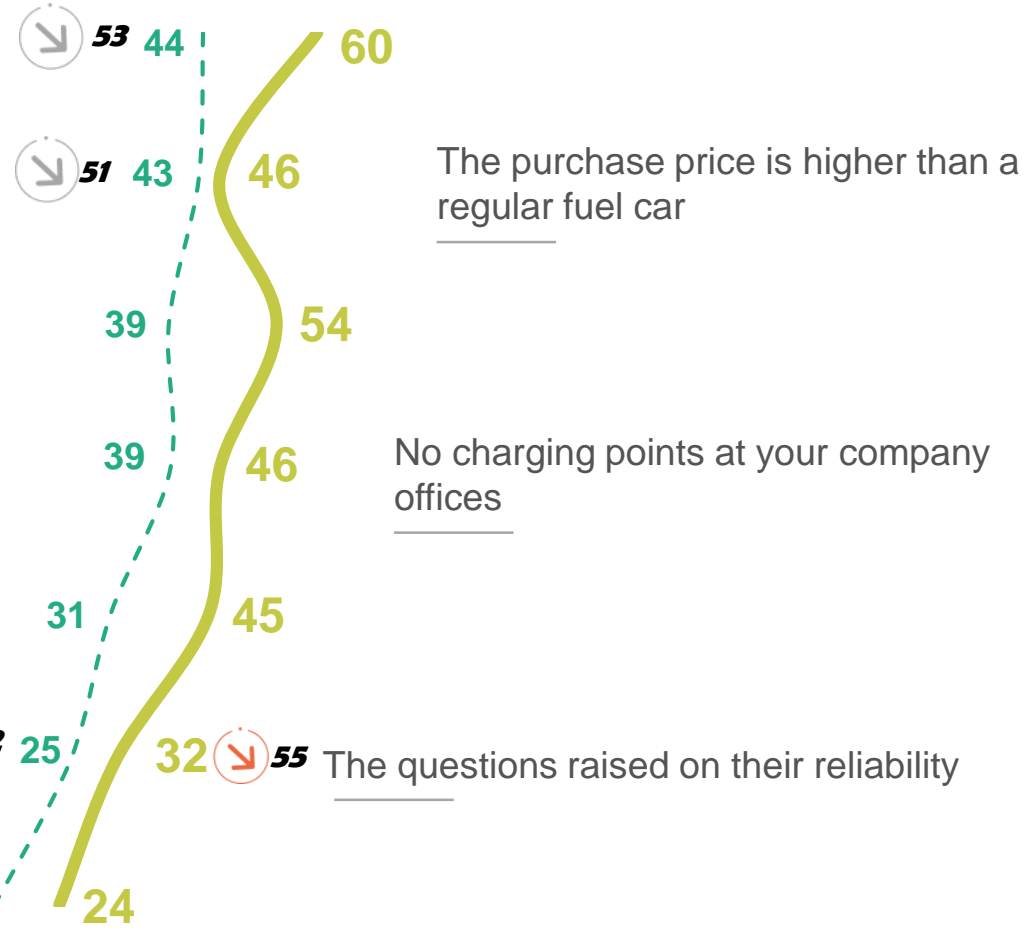
54

Not enough public charging points

No charging solutions at your employees' home

The range of models is limited for this type of vehicles

Your employee's reluctance to drive electric vehicles



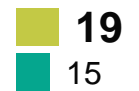
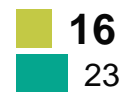
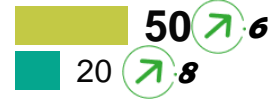
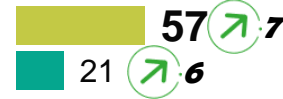
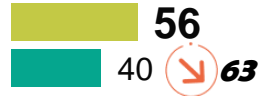
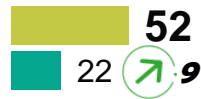
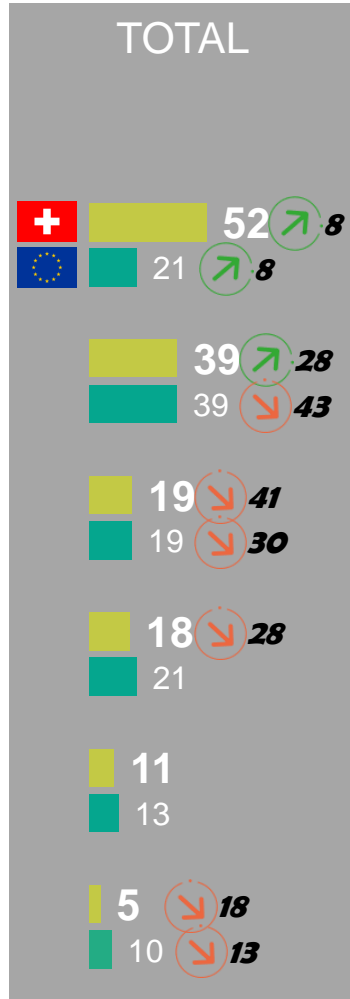
What are the constraints of using 100% Battery Electric vehicles?
Basis: Not considering implementing 100% BEV technology

ACCESS TO 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

CHARGING POINT ACCESS MANAGEMENT

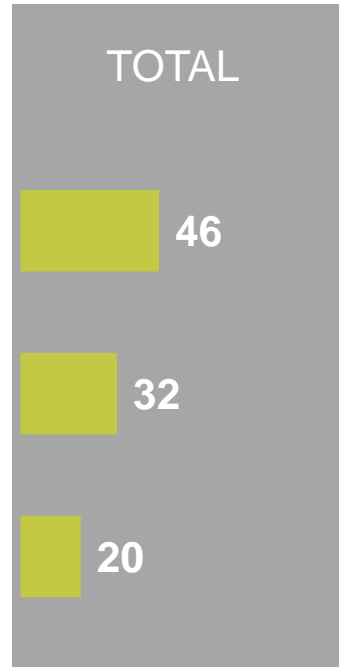
59%

Of companies are using or consider using in the next three years BEV or PHEV in their fleet

In %



Passenger cars + LCVs



We have already installed or are going to install charging points in our company's offices

We use public charging points

We don't plan to install charging points, because we use lump sum payments

Don't know

7

2

3

5

10

11

41

38

19

45

26

30

51

29

20

48

31

12

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

Several answers possible: % don't add up to 100%

DRIVER SUPPORT FOR CHARGING POINT INSTALLATION

59%

Of companies are using or consider using in the next three years BEV or PHEV in their fleet

In %



Passenger cars + LCVs

TOTAL

NET Yes

43

49

26

54

39

Yes, you are in charge of the complete installation and give a complete finance support for the charging boxes

25

24

11

40

23

Yes, you use lump sum payments

18

25

15

14

16

No, this is owed by driver with no finance support

54

50

70

46

55

Don't know

3

1

4

1

7

Do you support your drivers for charging points installation?

Basis: have already implemented BEV/PHEV or considering to implement BEV/PHEV in their fleet

6

WHAT ARE THE PERSPECTIVES IN TERMS OF ALTERNATIVE MOBILITY SOLUTIONS?



MOBILITY ALTERNATIVES LIST AND DEFINITIONS



CORPORATE CAR SHARING:

where 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: where several employees travel in the same car to the same destination (Bolt, Faxe)



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

ALTERNATIVE MOBILITY SOLUTIONS IMPLEMENTATION

At least one already implemented

In %

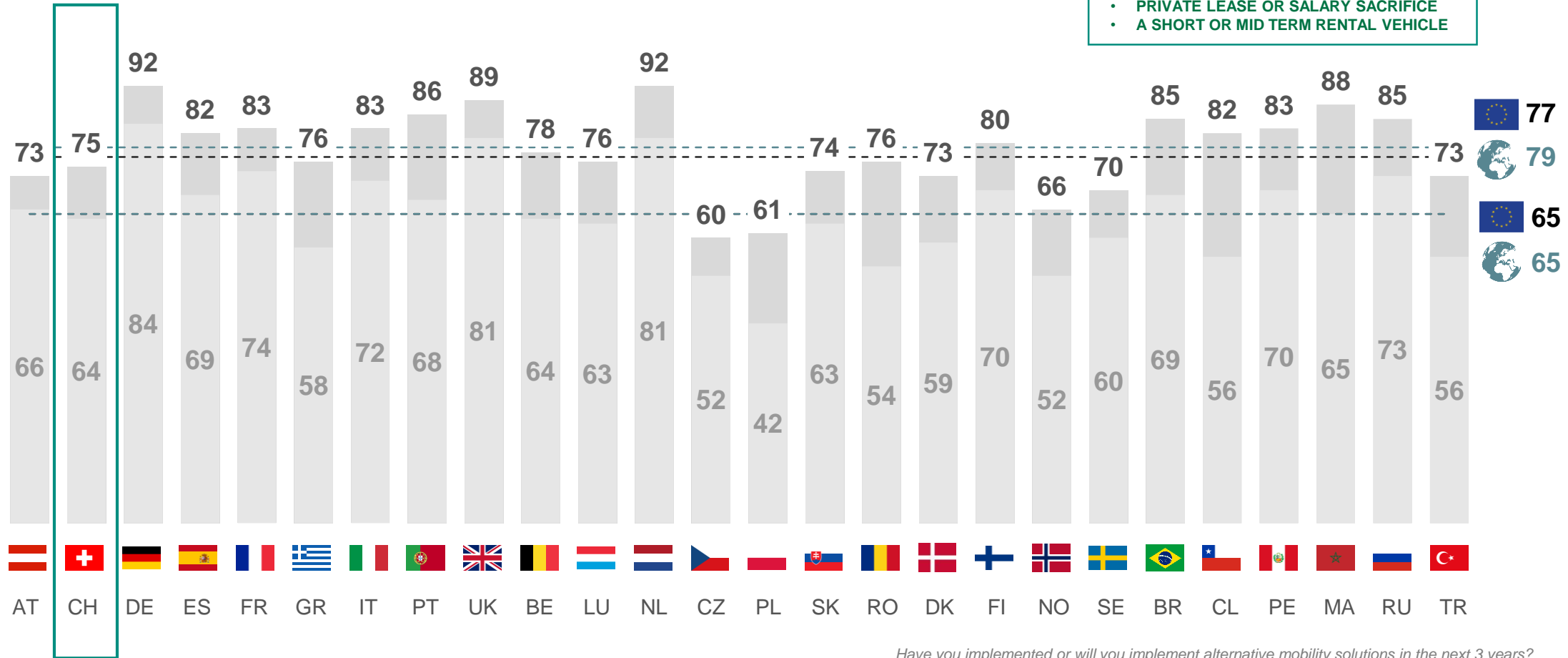
- List of the alternative mobility solutions:
- CORPORATE CAR SHARING
 - RIDE SHARING
 - BIKE SHARING
 - PUBLIC TRANSPORT
 - MOBILITY BUDGET
 - AN APP TO BOOK MOBILITY SOLUTIONS PROVIDED BY THE COMPANY
 - PRIVATE LEASE OR SALARY SACRIFICE
 - A SHORT OR MID TERM RENTAL VEHICLE



ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS



ALREADY USING



EU 77
 Global 79
 EU 65
 Global 65

Have you implemented or will you implement alternative mobility solutions in the next 3 years?
 Response scale: Already using, considered in the next 3 years, not interested
 Basis: companies with corporate vehicles = 100%

ALTERNATIVE MOBILITY SOLUTIONS IMPLEMENTATION

At least one already implemented

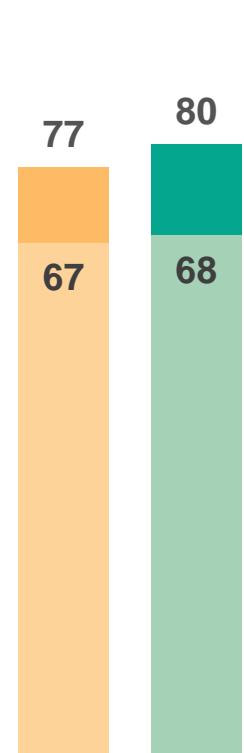
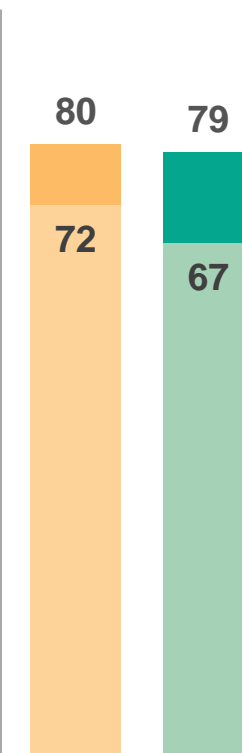
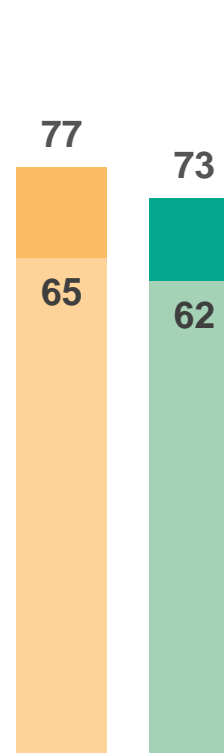
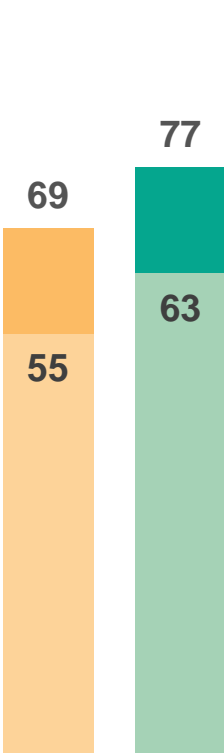
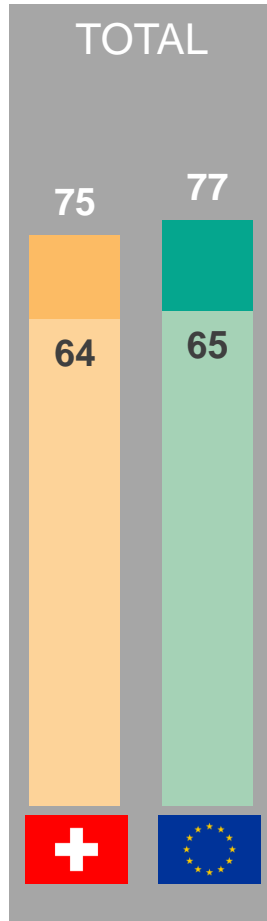
In %



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



Have you implemented or will you implement alternative mobility solutions 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

In %



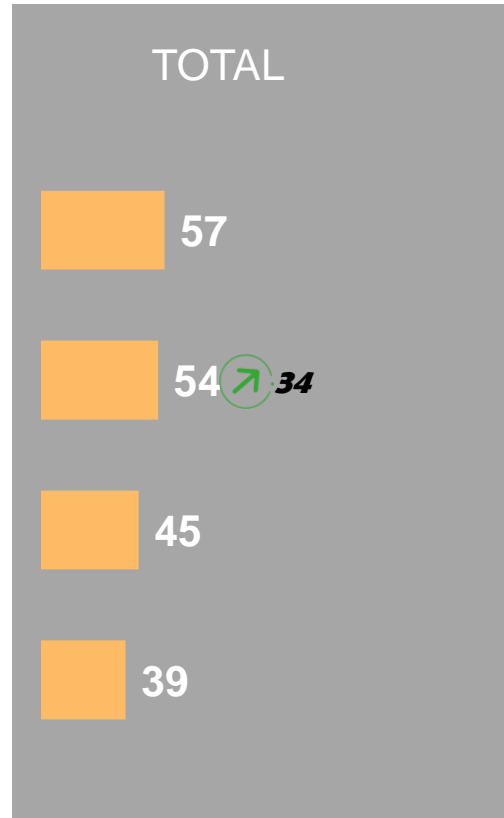
Passenger cars + LCVs

You support your employees in their wish for more options and flexibility in relation to mobility

It brings lower cost of mobility

Higher productivity as a result of different use of time

It fits your views on doing business in sustainable and responsible way



Low basis



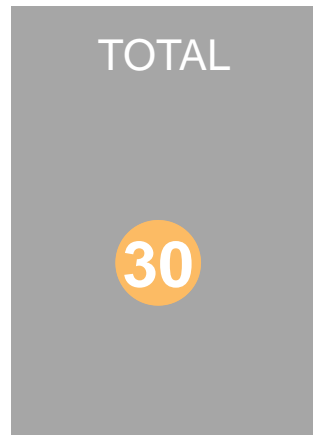
READY TO INTRODUCE OR INCREASE HOMEWORKING

In %



Passenger cars + LCVs

% YES



30



30



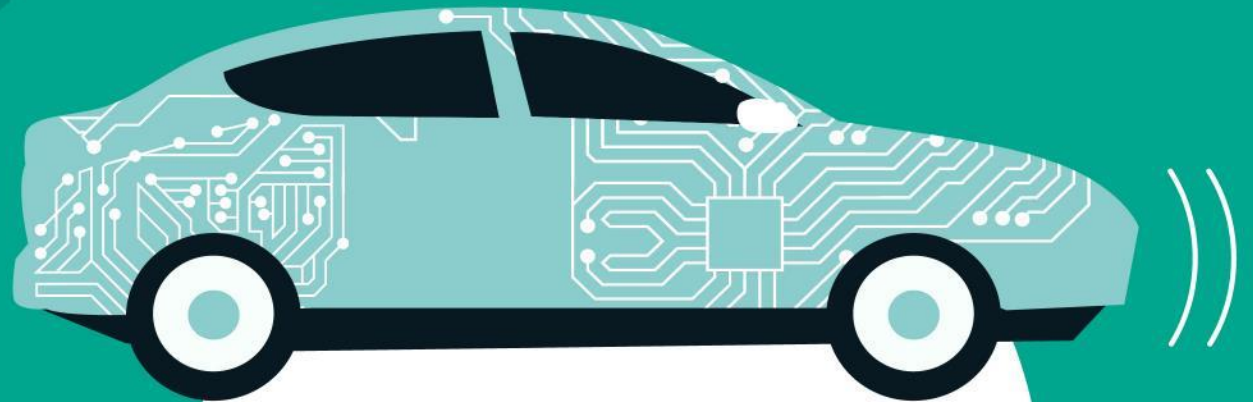
28



33

7

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



CONNECTED VEHICLES



USE OF TELEMATICS



30%



33%



TOP 3 REASONS



34%



29%

#1 To improve drivers safety / behaviours

#2 To locate vehicles or improve vehicle security

#3 To improve operational efficiency

32%

39%

31%

30%

PROPORTION OF COMPANIES USING CONNECTED VEHICLES*

All vehicles

In %



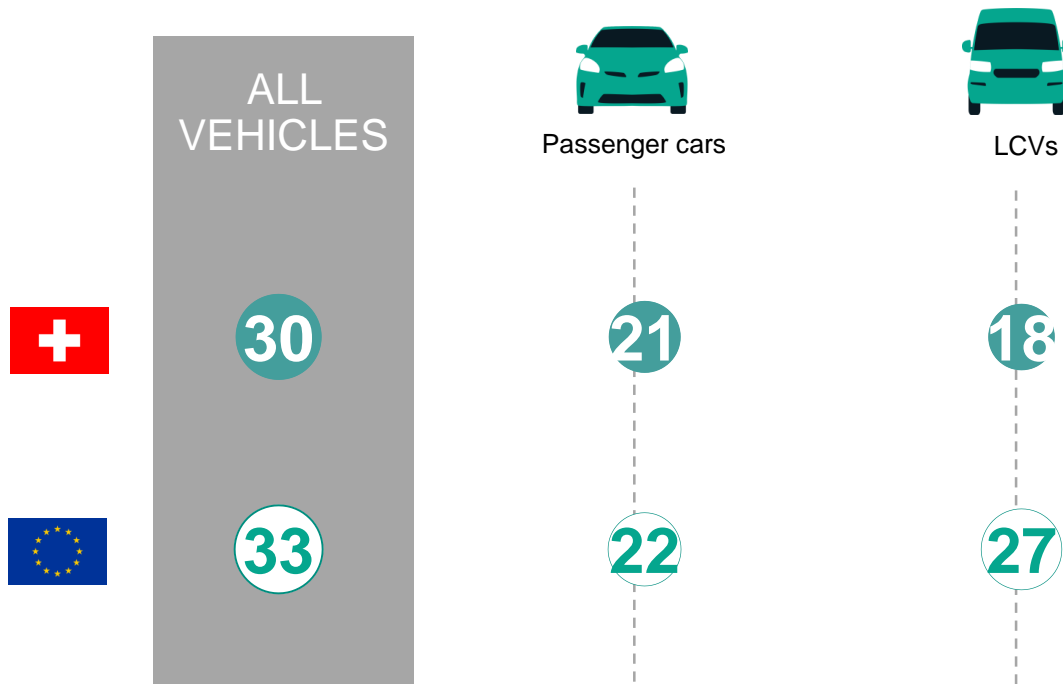
Passenger cars + LCVs

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

HOW TO READ THE RESULTS ?

30% of companies with fleet using connected vehicles for all or part of their fleet.

21% use connected vehicles for passenger cars, while 18% use connected vehicles for LCVs.



*This question has been asked differently in 2021, no comparison vs 2021

Is your fleet connected thanks to a telematic tool?

Telematics enables transmission of data to the fleet manager to monitor fuel consumption, driver behaviour, vehicle location, driver's impact on environment... from vehicles on the move. Data is transmitted by means of an original or after sales equipment or box installed in the vehicle. Telematics do not include data transmission by the mean of the users' smartphones.

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

PROPORTION OF COMPANIES USING CONNECTED VEHICLES*

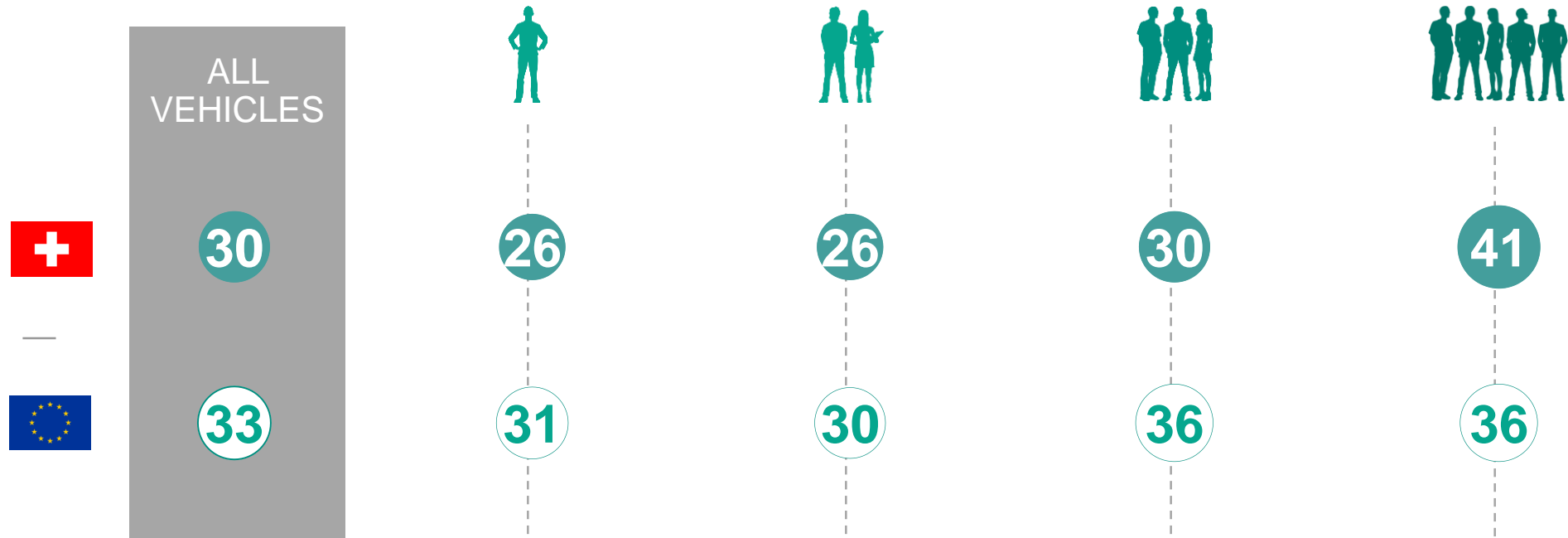
All vehicles

In %



Passenger cars + LCVs

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



*This question has been asked differently in 2021, no comparison vs 2021

Is your fleet connected thanks to a telematic tool?

Telematics enables transmission of data to the fleet manager to monitor fuel consumption, driver behaviour, vehicle location, driver's impact on environment... from vehicles on the move. Data is transmitted by means of an original or after sales equipment or box installed in the vehicle. Telematics do not include data transmission by the mean of the users' smartphones.

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

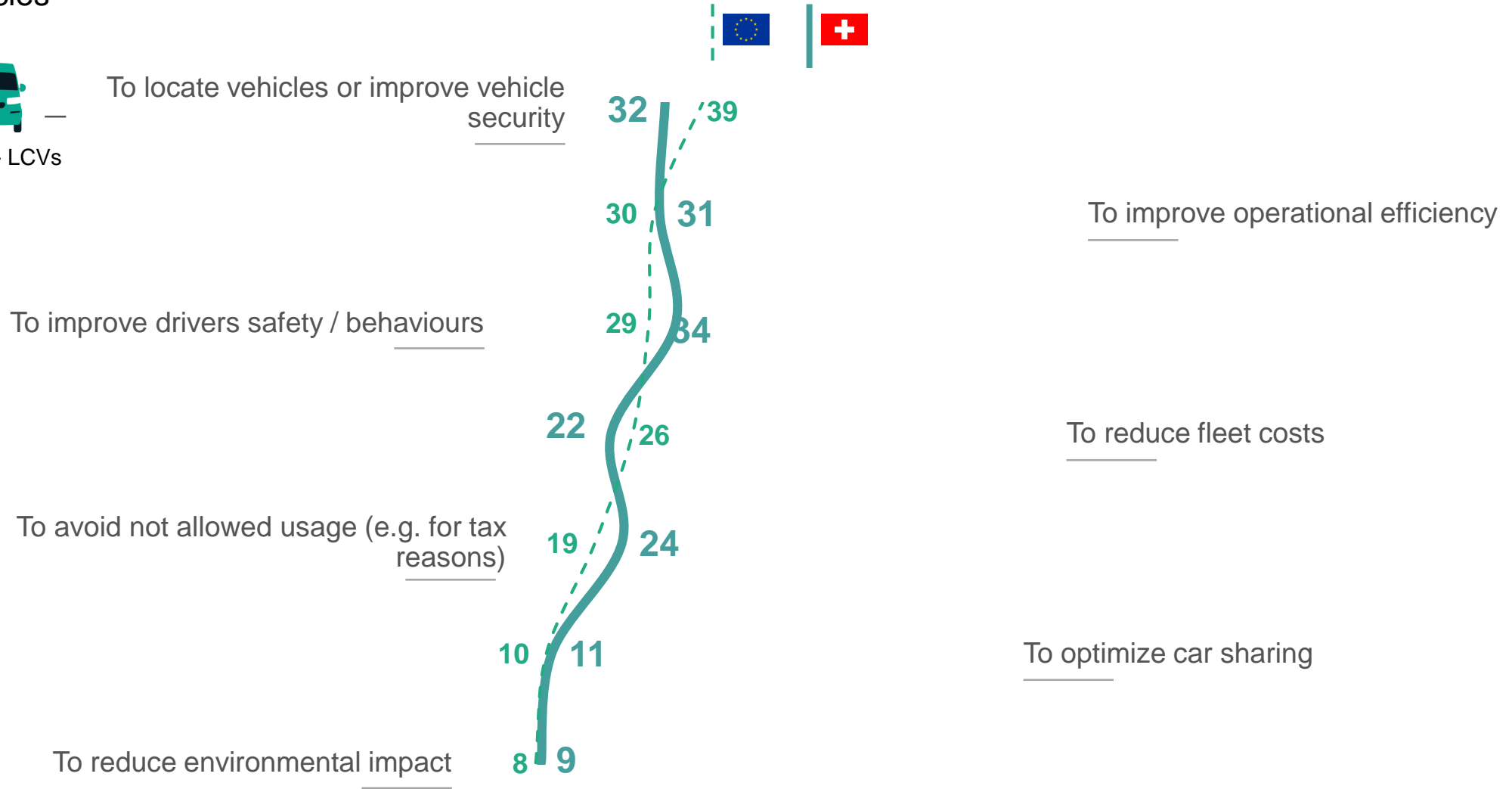
REASONS FOR USING CONNECTED VEHICLES

All vehicles

In %



Passenger cars + LCVs



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

REASONS FOR USING CONNECTED VEHICLES

All vehicles - Focus on 1 to 99

In %



Passenger cars + LCVs

To locate vehicles or improve vehicle security

To improve drivers safety / behaviours

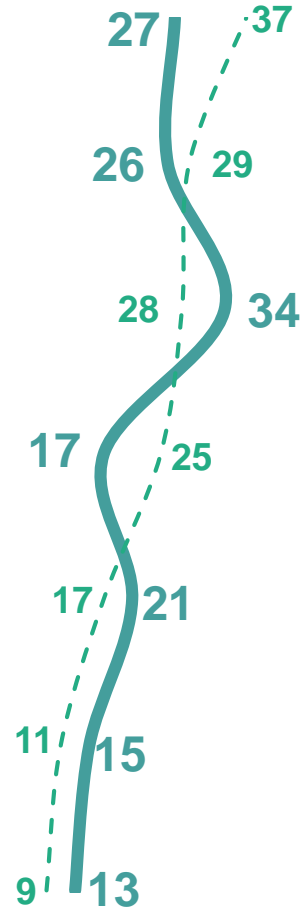


+



To avoid not allowed usage (e.g. for tax reasons)

To reduce environmental impact



To improve operational efficiency

To reduce fleet costs

To optimize car sharing

REASONS FOR USING CONNECTED VEHICLES

All vehicles - Focus on 100 and more

In %



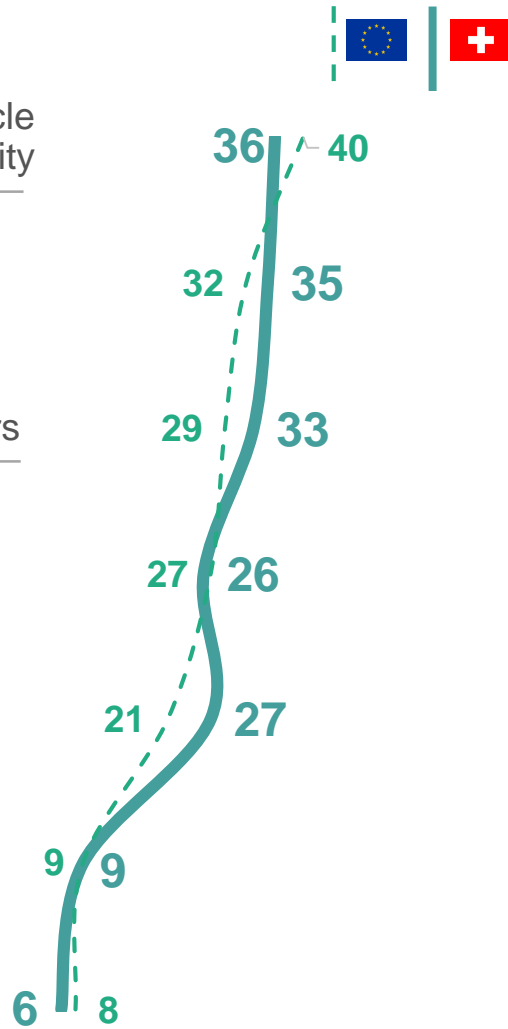
Passenger cars + LCVs

To locate vehicles or improve vehicle security

To improve drivers safety / behaviours

To avoid not allowed usage (e.g. for tax reasons)

To reduce environmental impact



To optimize car sharing

To improve operational efficiency

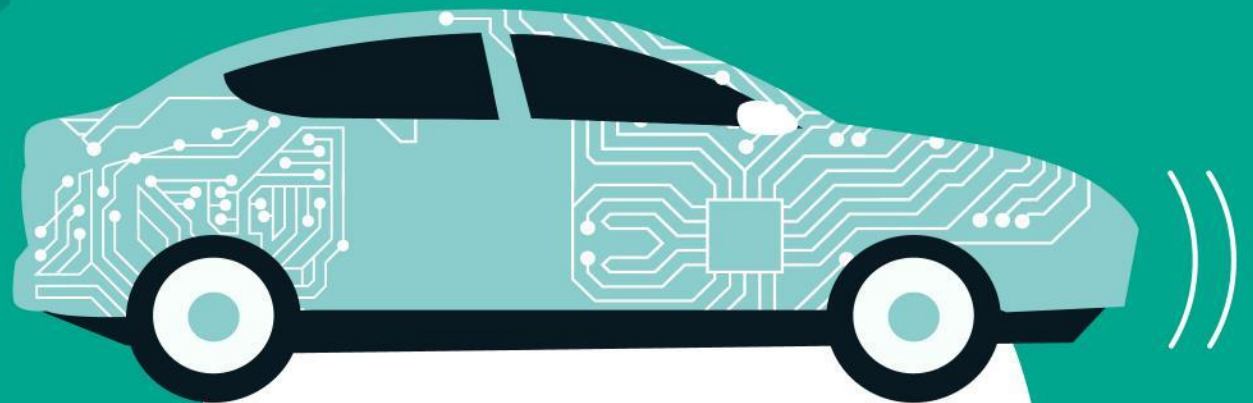
To reduce fleet costs

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

7

CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY

A. PASSENGER CARS



PROPORTION OF COMPANIES USING CONNECTED VEHICLES*

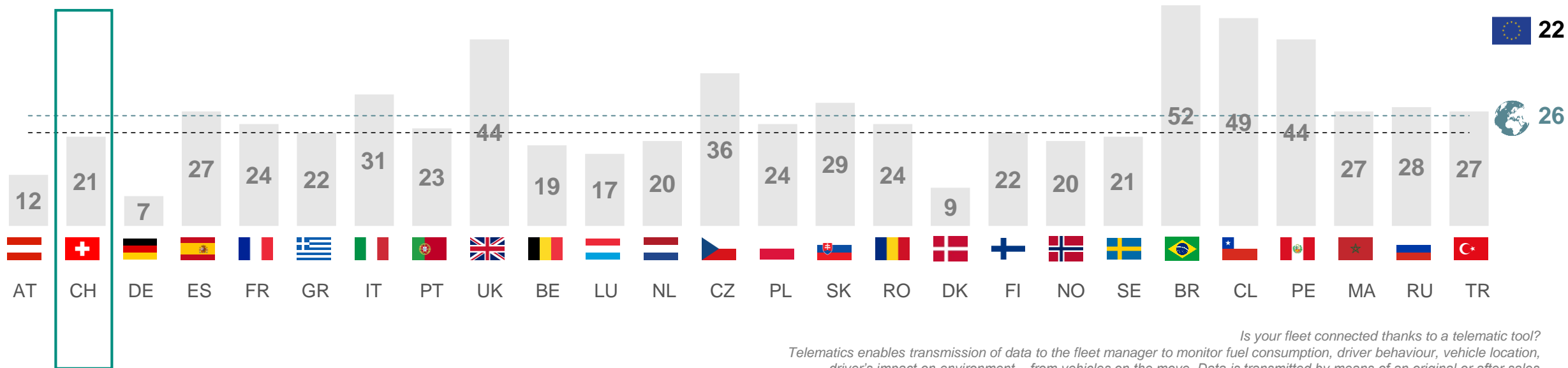
Passenger cars

In %



Passenger cars

PROPORTION OF COMPANIES USING CONNECTED VEHICLES FOR THEIR PASSENGER CARS



*Is your fleet connected thanks to a telematic tool?
Telematics enables transmission of data to the fleet manager to monitor fuel consumption, driver behaviour, vehicle location, driver's impact on environment... from vehicles on the move. Data is transmitted by means of an original or after sales equipment or box installed in the vehicle. Telematics do not include data transmission by the mean of the users' smartphones.
Basis: companies with corporate passenger cars / companies with corporate LCVs*

PROPORTION OF COMPANIES USING CONNECTED VEHICLES*

Passenger cars

In %

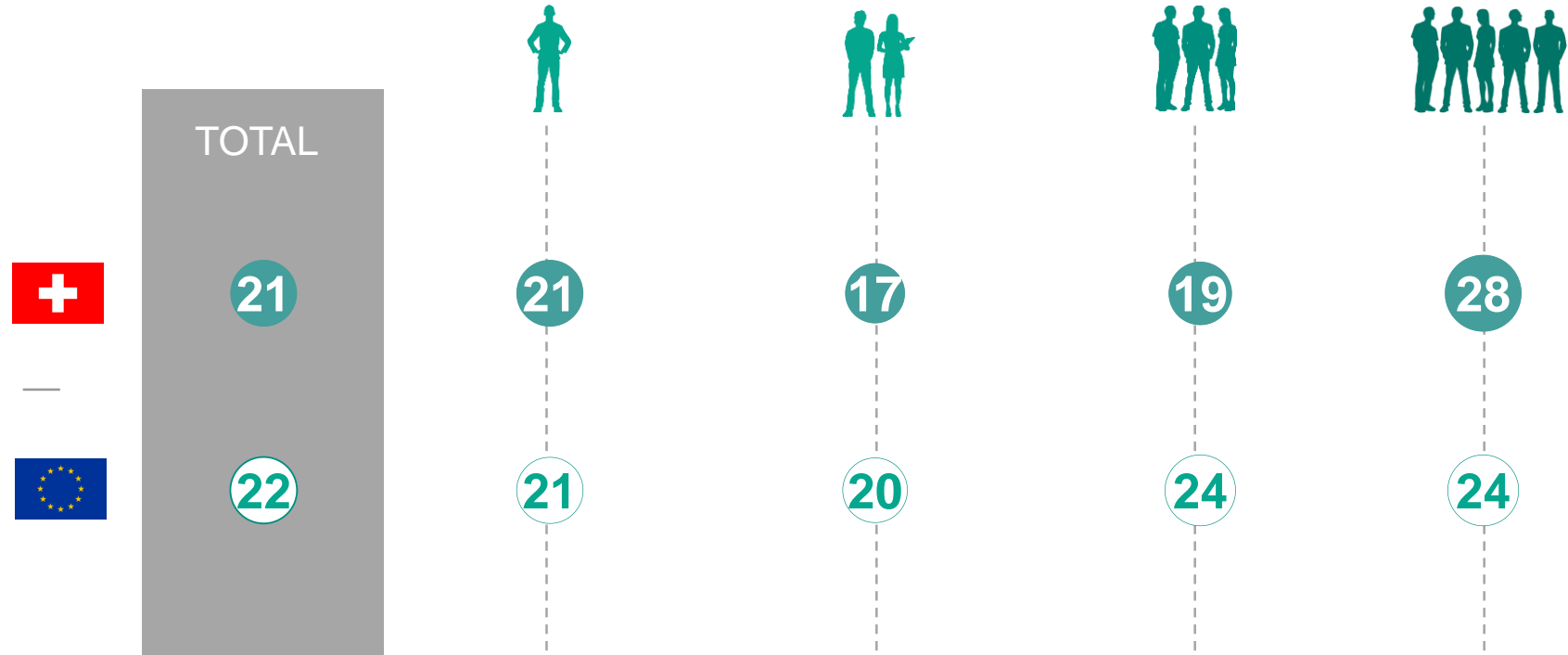


Passenger cars

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

HOW TO READ THE RESULTS ?

21% use connected vehicles for passenger cars.



*This question has been asked differently in 2021, no comparison vs 2021.

Is your fleet connected thanks to a telematic tool?

Telematics enables transmission of data to the fleet manager to monitor fuel consumption, driver behaviour, vehicle location, driver's impact on environment... from vehicles on the move. Data is transmitted by means of an original or after sales equipment or box installed in the vehicle. Telematics do not include data transmission by the mean of the users' smartphones.

Basis: companies with at least one passenger car in fleet

REASONS FOR USING CONNECTED VEHICLES

Passenger cars

In %



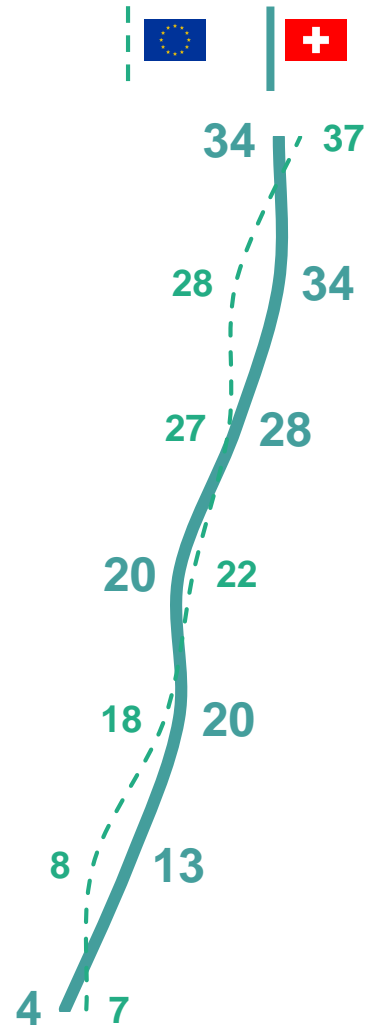
Passenger cars

To locate vehicles or improve vehicle security

To improve operational efficiency

To avoid not allowed usage (e.g. for tax reasons)

To reduce environmental impact



To improve drivers safety / behaviours

To reduce fleet costs

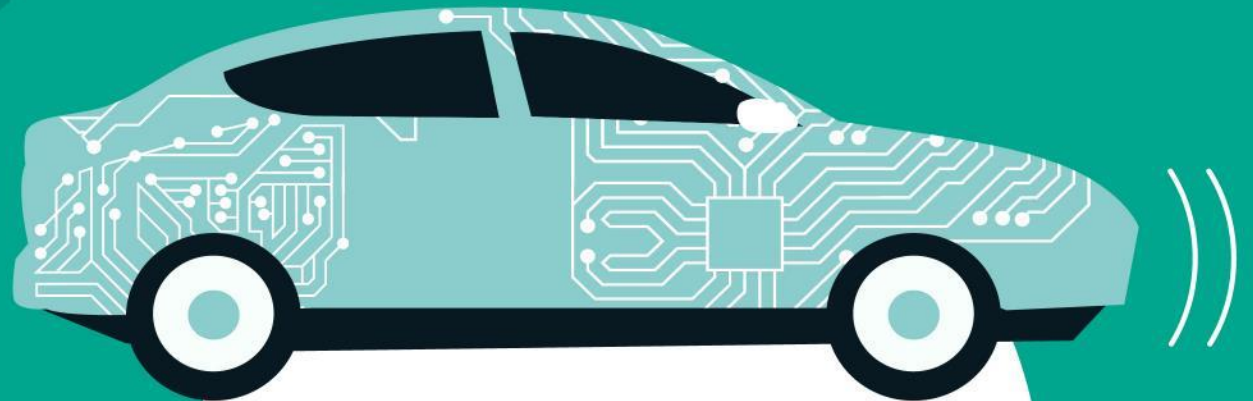
To optimize car sharing

What are the two main reasons why your fleet is connected by Telematics?
Basis: companies with connected passenger cars thanks to Telematics

7

CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY

B. LCVs



PROPORTION OF COMPANIES USING CONNECTED VEHICLES

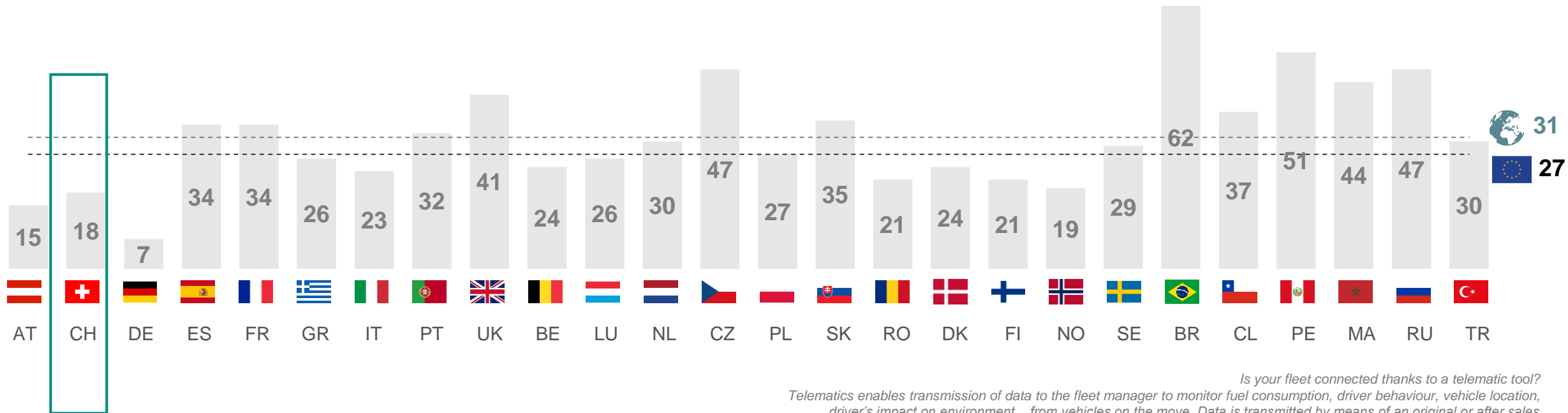
LCVs

In %



LCVs

PROPORTION OF COMPANIES USING CONNECTED VEHICLES FOR THEIR LCVs



Is your fleet connected thanks to a telematic tool?
 Telematics enables transmission of data to the fleet manager to monitor fuel consumption, driver behaviour, vehicle location, driver's impact on environment... from vehicles on the move. Data is transmitted by means of an original or after sales equipment or box installed in the vehicle. Telematics do not include data transmission by the mean of the users' smartphones.
 Basis: companies with corporate passenger cars / companies with corporate LCVs

PROPORTION OF COMPANIES USING CONNECTED VEHICLES*

LCVs

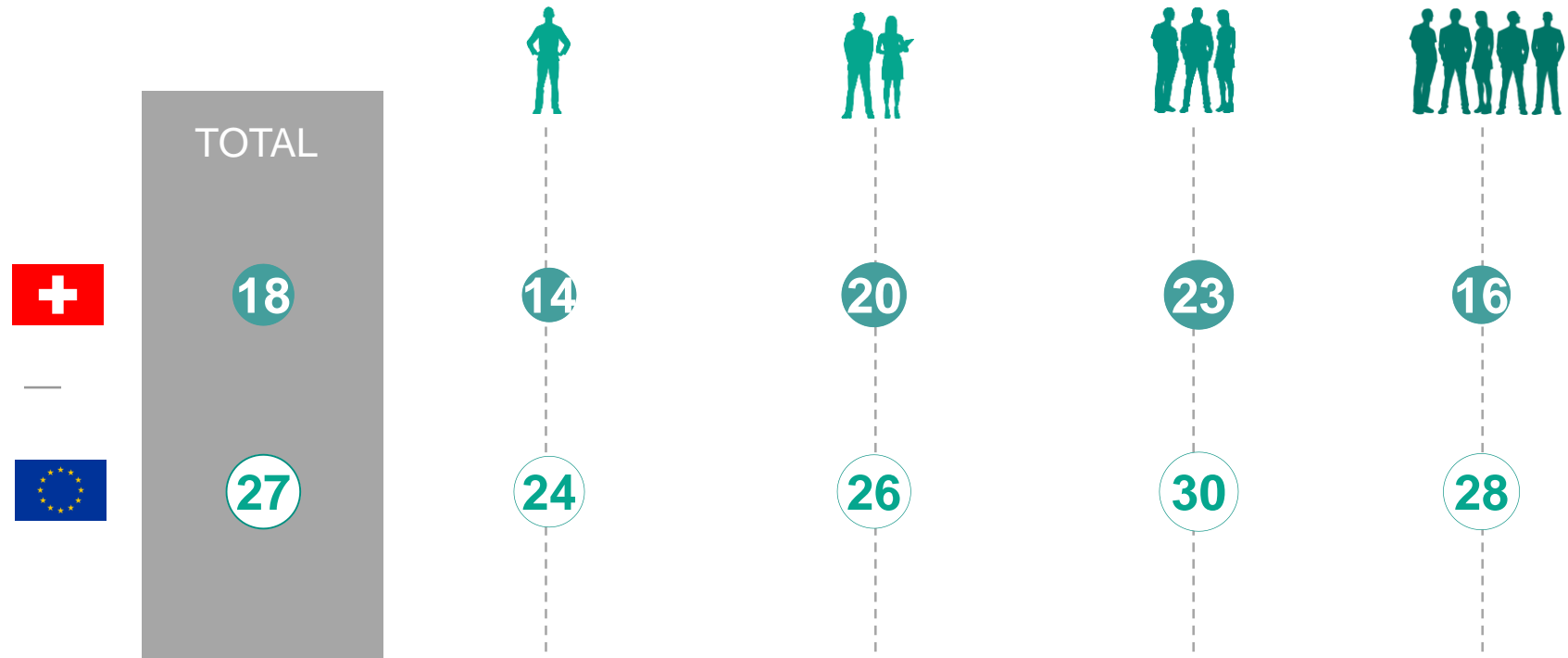
In %



LCVs

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

HOW TO READ THE RESULTS ?
18% use connected vehicles for LCVs.



*This question has been asked differently in 2021, no comparison vs 2021.

Is your fleet connected thanks to a telematic tool?

Telematics enables transmission of data to the fleet manager to monitor fuel consumption, driver behaviour, vehicle location, driver's impact on environment... from vehicles on the move. Data is transmitted by means of an original or after sales equipment or box installed in the vehicle. Telematics do not include data transmission by the mean of the users' smartphones.

Basis: companies with at least one LCV car in fleet

REASONS FOR USING CONNECTED VEHICLES

LCVs

In %



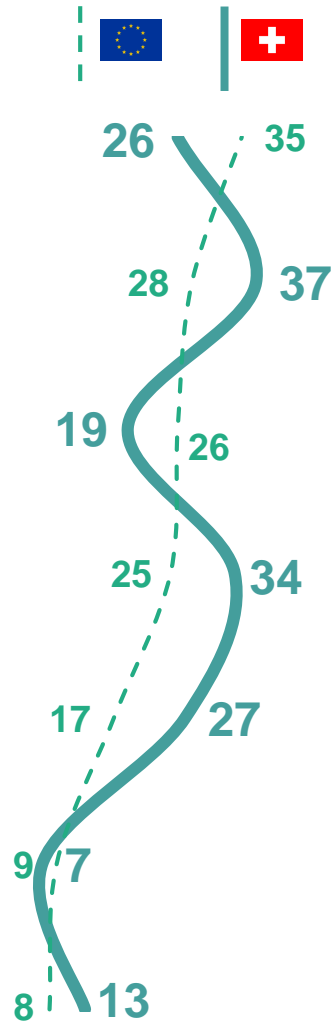
LCVs

To locate vehicles or improve vehicle security

To reduce fleet costs

To avoid not allowed usage (e.g. for tax reasons)

To reduce environmental impact



To improve operational efficiency

To improve drivers safety / behaviours

To optimize car sharing

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

Thank you