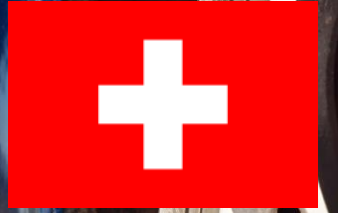




Arval Mobility  
Observatory



# MOBILITY AND FLEET BAROMETER 2023





## 01

Context and methodology

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## 02

Executive summary

..... p11

## 03

What are the main characteristics of the fleets?

..... p15

## 04

How are companies financing their fleet?

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## 05

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## 06

What are the perspectives in terms of mobility solutions ?

..... p106

## 07

What are the usages in terms of connected vehicles, digital tools and road safety equipments?

..... p141

1

# CONTEXT AND METHODOLOGY



# KEY THEMES FOR ARVAL MOBILITY OBSERVATORY



1

WHAT SHORT TERM  
SHIFTS ARE SHAPING THE  
MARKET?



2

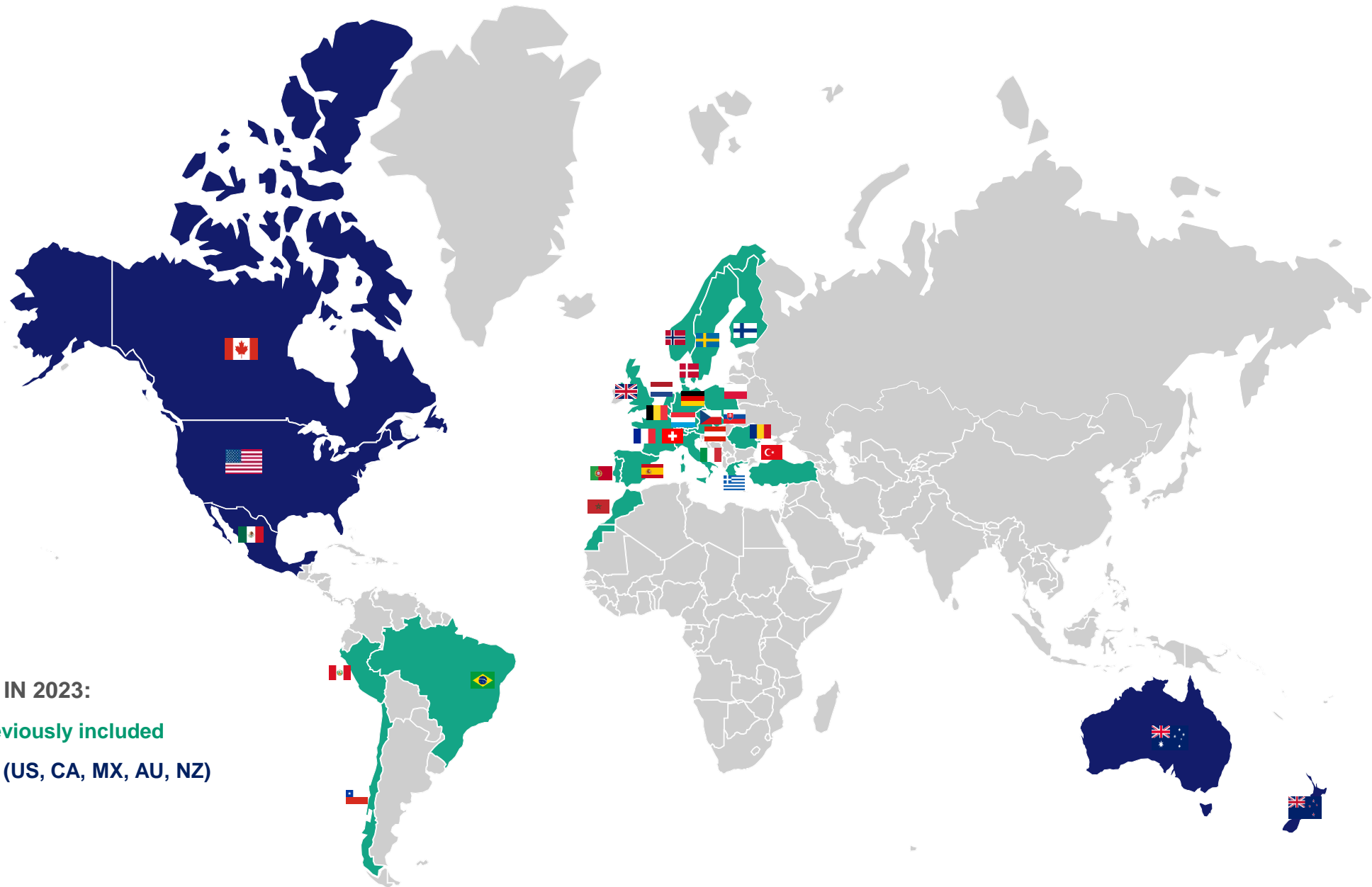
WHAT KIND OF VEHICLES  
WILL THE MARKET  
EXPECT IN 3 YEARS?



3

HOW DO MOBILITY  
SOLUTIONS IMPACT  
FLEET MANAGEMENT?

# SCOPE OF THE SURVEY



30 COUNTRIES IN 2023:

- 25 countries previously included
- 5 new countries (US, CA, MX, AU, NZ)

# COMPANY SIZE SEGMENT DEFINITION

WORLD

EUROPE

OUT OF EUROPE

	AT	CH	DE	ES	FR	GR	IT	PT	UK	BE	LU	NL	CZ	PL	SK	RO	DK	FI	NO	SE	MA	TR	BR	CL	PE	US	CA	MX	AU	NZ
Less than 10 empl.	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
10 - 99 empl.	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
100 - 249 empl.	●					●					●				●		●	●	●	●	●	●	●	●			●	●	●	
100 - 499 empl.		●		●				●		●		●	●	●		●							●			●				
100 - 999 empl.			●		●		●		●																●					
250 empl. or more	●					●					●				●		●	●	●	●	●	●	●	●	●		●	●	●	
500 empl. or more		●		●				●		●		●	●	●		●							●			●				
1000 empl. or more			●		●		●		●																●					



# METHODOLOGY



DATA COLLECTION METHOD



FIELDWORK PERIOD



TARGET



QUOTAS

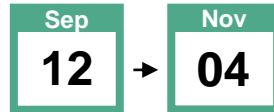


SAMPLE



DURATION OF INTERVIEW

CATI SYSTEM  
(Computer Assisted Telephone Interviewing)  
Recruitment by telephone



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

COMPANY SIZE & SECTOR

5865 | Europe  
1650 | Americas  
1107 | Rest of the world (TR,MA,AU,NZ)  
-----  
8622 | Interviews in total

20 minutes on average

## 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 2022 year  
XX = score 2022



XX | Significantly lower than 2022 year  
XX = score 2022

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 empl.  
**99 INTERVIEWS**



Companies with 10 - 99 empl.  
**60 INTERVIEWS**



Companies with 100 - 499 empl.  
**81 INTERVIEWS**



Companies with 500 empl. or more  
**60 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 SOLUTIONS 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



**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



**CAR OR CASH ALLOWANCE** \*New item

2

# EXECUTIVE SUMMARY



# INSIGHT 1: SWISS COMPANIES REMAIN CONFIDENT IN THE PERSPECTIVES FOR THEIR FLEETS, DESPITE PERSISTING UNCERTAINTIES

#1

## THE CONFIDENCE SEEN IN 2022 IS CONFIRMING, BUT TENSIONS ON THE MARKET WEIGHT IN, ALONG WITH RESTRICTIVE PUBLIC POLICIES

- Just like in 2022, **companies remain optimistic** about the future of their fleets.
  - 9 out of 10 companies anticipate a stability or increase within the next 3 years, similar to the European average.
  - Vehicles possession length remains stable, for both passenger cars and LCVs
  - In details, the share of companies anticipating a decrease is higher among smaller companies, following the European trend, while larger companies remain more optimistic
  - This year also shows opposite trends between small and large companies, the first ones anticipating more a decrease of their LCV fleet, while the latter anticipate more a decrease of their passenger car fleet
- **The anticipated fleet growth remains mainly driven by business development first, followed by HR needs**, while plans to offer vehicles to employees with no company car eligibility increases significantly in Switzerland for 2023.
- **Homeworking keeps developing, but this evolution hardly impacts companies' mobility policy yet.**
- **If the direct impacts of the Covid crisis seem behind, companies remain impacted by tensions on the automotive market** (increasing total cost of ownership of the vehicles, longer delivery times, evolutions of car selling models...), while **the main challenge anticipated is the adaptation to increasingly restrictive public policies on ICE.**

# INSIGHT 2: ALTERNATIVE TECHNOLOGIES KEEP INCREASING FOR PASSENGER CARS, BUT BEV ADOPTION REMAINS MORE CHALLENGING FOR LCVS

#2

## SWISS COMPANIES ARE ACCELERATING IN THE TRANSITION TO ALTERNATIVE TECHNOLOGIES & SOLUTIONS

- This year **nearly 6 out of 10 companies with passenger cars are equipped with alternative fuel technologies** (on par with the European average).
  - HEV & PHEV increase significantly this year, the 1<sup>st</sup> one being far ahead (36%), while BEV share is more stable (26%).
  - The adoption of these technologies for passenger cars is mostly driven by CSR compliance, their lower environmental impact, reduction of fuel expenses and company image remaining important motivations, confirming last year's trends.
- But **the shift towards 100% BEV remains much slower and does not increase for LCVs**, in line with the European trend
  - Larger companies remain ahead of smaller ones in terms of consideration.
  - On the same note, Hydrogen Fuel cell remains marginal within Swiss LCV fleets for now, with a limited consideration, in line with the European average.
- If **access to charging points** remains the strongest one, the **perception of barriers to BEV adoption is decreasing this year**, which tends to show a “normalization” of BEV, but the offer remains a significant barrier (higher purchase prices and limited choice of models)
- To address these barriers, **more companies plan to equip their premises with charging points within the next 12 months**, but also, for those who don't plan to install charging points, **develop lump sum payments to employees to cover charging fees.**



#3

### THE USE OF OPERATING LEASING INCREASING BUT REMAINS LESS USED THAN OUTRIGHT PURCHASE

- **Operating leasing is used by 1 in 4 companies, for both passenger cars and LCVs, but remains slightly below the European average (29%).**
  - The share of companies considering to introduce or increase Operating Leasing in the next 3 years remains stable : 22%.
  - But this potential remains below the European average (34%), showing some room for growth.
  - Outright purchase is the main financing method used by Swiss companies (37%).
- **Focusing on SMEs, their path to purchase remains strongly driven by direct contact with dealerships, while Leasing companies remain significantly behind, showing some room for improvement in terms of partnership with SMEs.**

#4

## AND SOME POSITIVE PERSPECTIVES

- **Adoption of mobility solutions is high**, in line with the European average, **with an increasing consideration within the next 3 years**, mostly driven by CSR and company attractiveness motivations, but also HR-related needs / employees' requests.
- If the implementation seems quite balanced between mobility solutions, ride sharing and public transport are the most widespread, **smaller companies seem more voluntarist on “innovative” ones**: corporate car sharing, mobility budget, mobility app.

#5

## AN INCREASE ESPECIALLY TRUE FOR LCVS

- This year, **the use of connected vehicles is increasing** in Switzerland, with **40% of Swiss companies using telematics tools for their fleet.**
- This increase is mostly driven by LCVs, while telematics is booming among mid-size companies which are now catching up with larger ones.
- The **main reasons** to use telematics slightly are:
  - Improve drivers safety / behaviours
  - Reduce fleet
  - Locate vehicles and improve vehicle security
  - Improve operational efficiency

3

# WHAT ARE THE MAIN CHARACTERISTICS OF THE FLEETS?



# SWISS COMPANIES REMAIN OPTIMISTIC REGARDING THE PERSPECTIVES FOR THEIR FLEETS, YET WITH CONTRASTED TRENDS BETWEEN SMALL AND LARGE COMPANIES AND WITH SOME CHALLENGES AHEAD

- 1 In line with last year's trend, Swiss companies **remain confident about the future of their fleets**, 91% anticipating a stability or increase within the next 3 years, similar to the European average.

  - Vehicles possession length remains stable, for both passenger cars and LCVs
  - In details, the share of companies anticipating a decrease is higher among smaller companies, following the European trend, while larger companies remain more optimistic
  - This year also shows opposite trends between small and large companies, the first ones anticipating more a decrease of their LCV fleet, while the latter anticipate more a decrease of their passenger car fleet
- 2 Just like last year, the reasons behind fleet **anticipated increase** rank in exactly the same order as Europe, namely **business development** first, followed by HR needs.
- 3 **Homeworking keeps developing** (25% of companies being ready to introduce or increase homeworking), but this evolution has a rather limited effect on companies' mobility policy: **8 companies out of 10 did not implement any change nor consider any adjustment linked to homeworking in the future** (in line with the European trend).
- 4 Swiss companies are facing **various challenges** for the years to come, the #1 being the **adaptation to restrictive public policies on petrol and diesel vehicles**, but also linked to **tensions on the market: increasing total cost of ownership of the vehicles, longer delivery times, evolutions of car selling models...**



# FLEET PROFILE



## MOBILITY POLICY

## ADAPTATION

## COINCIDING WITH

## HOMEWORKING



18%

changed the policy or consider changing



15% <sup>13</sup>



6.7

years



5.6

years



## FLEET POSSESSION LENGTH



## ANTICIPATED

## FLEET EVOLUTION

(% will increase or remain stable)

90%



91% <sup>93</sup>

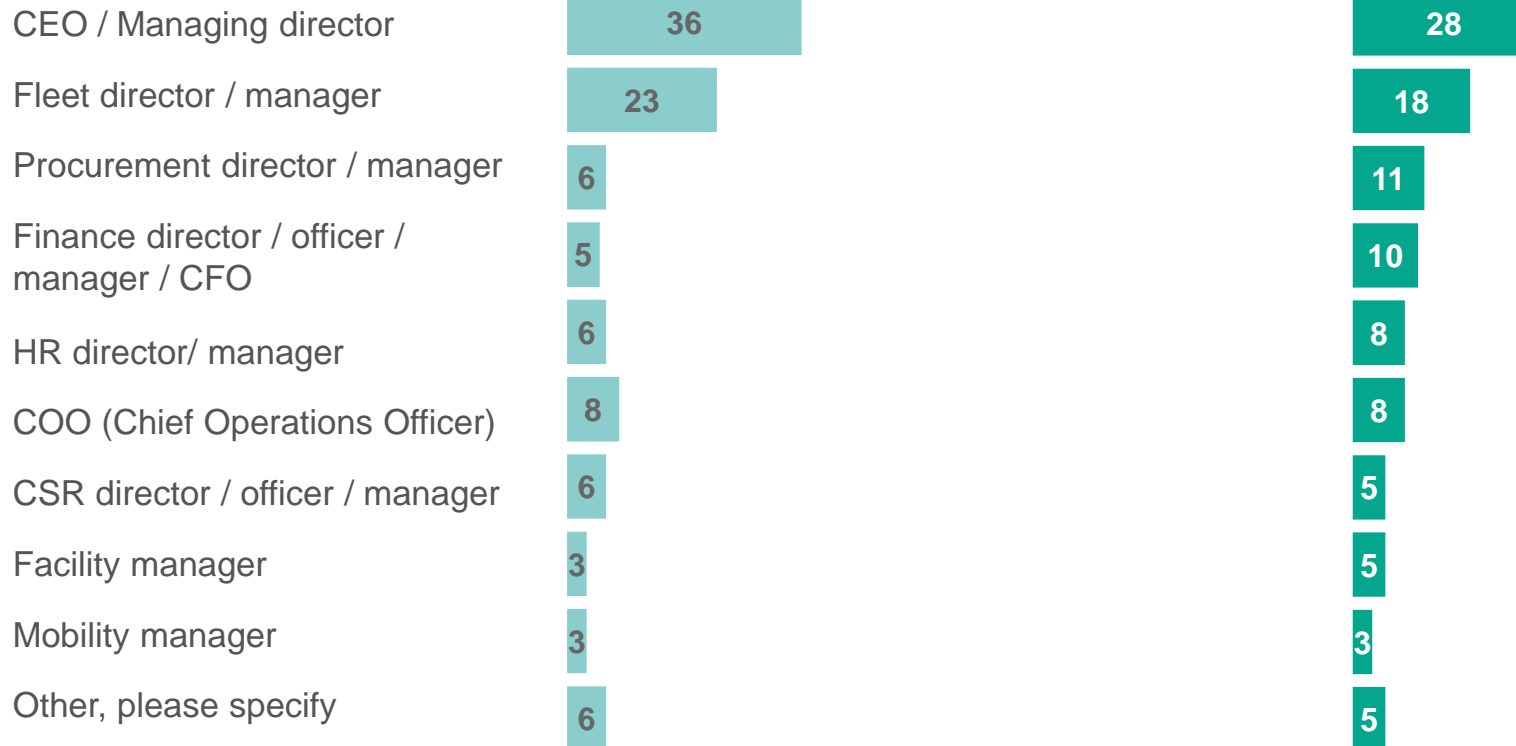


# RESPONDENTS POSITION WITHIN THE COMPANY

In %



Passenger cars + LCVs



New question added in 2023

Could you please specify your exact position in the company?

Basis: companies with corporate vehicles = 100%

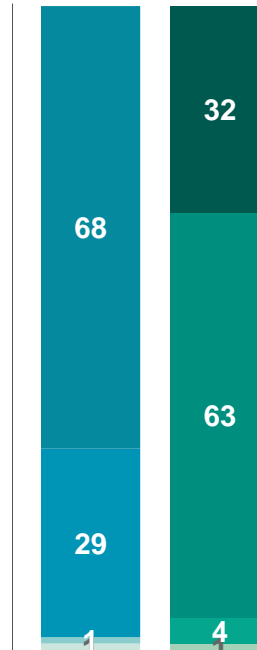
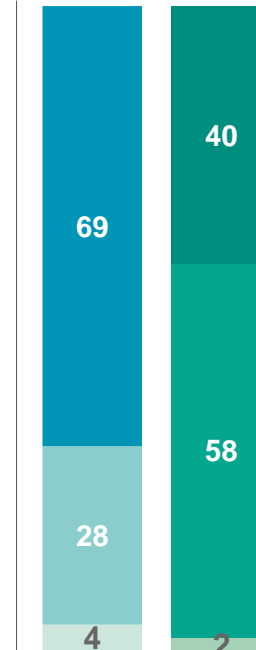
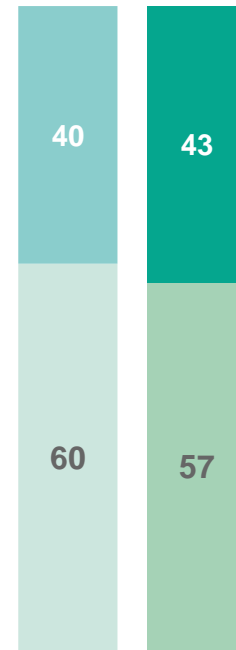
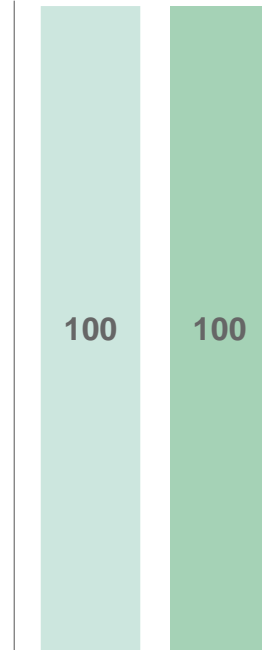
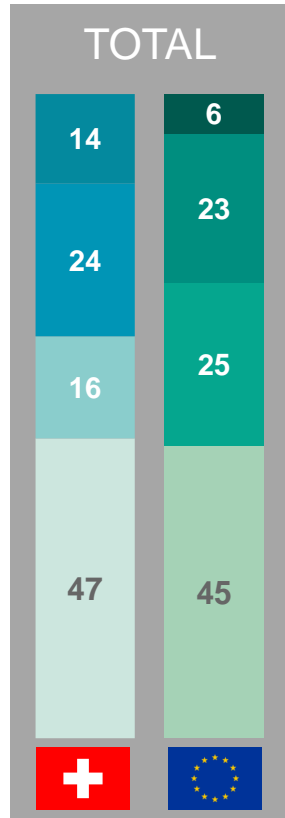
# NUMBER OF VEHICLES IN FLEET

In %



Passenger cars + LCVs

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

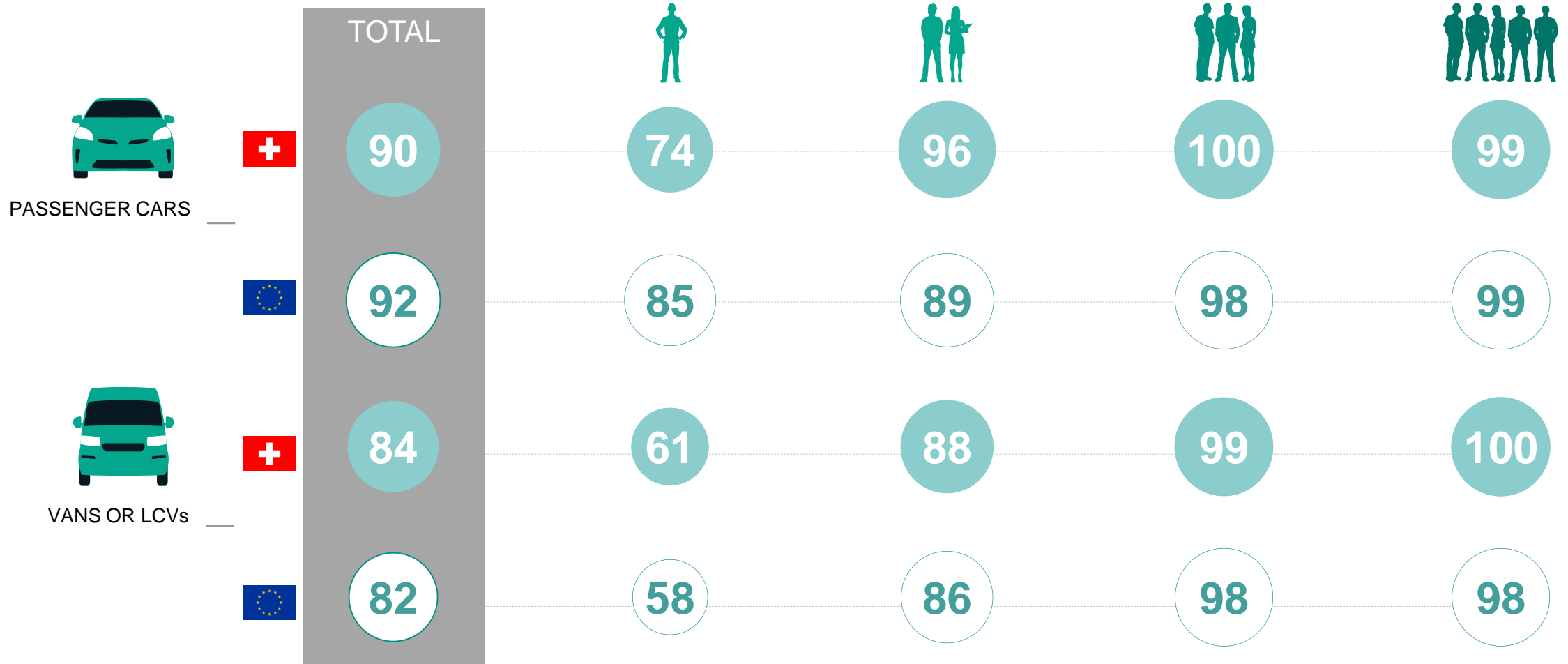


Can you please tell us the total number of vehicles of less than 3.5 tons in your fleet?  
Basis: companies with corporate vehicles = 100%

# 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%

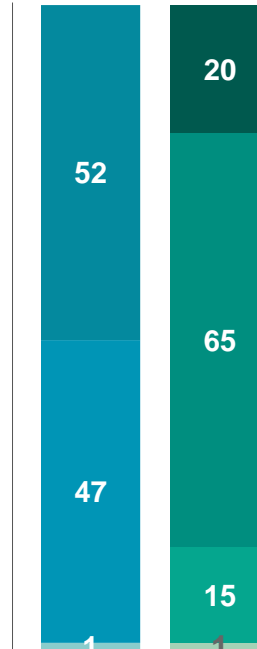
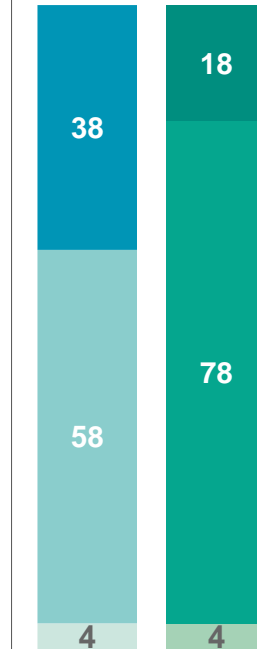
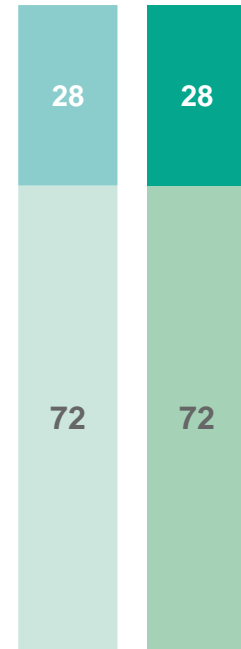
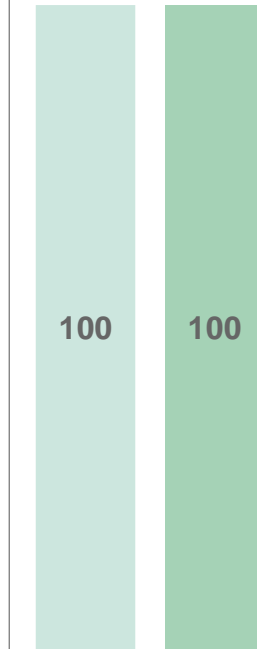
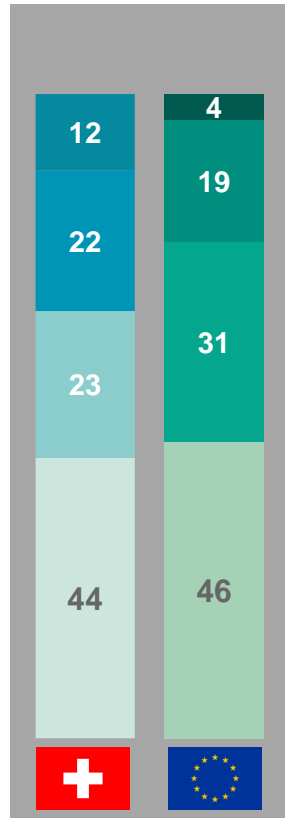
# NUMBER OF PASSENGER CARS IN FLEET

In %



Passenger cars

- 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 cars in your fleet?  
Basis: companies with passenger cars



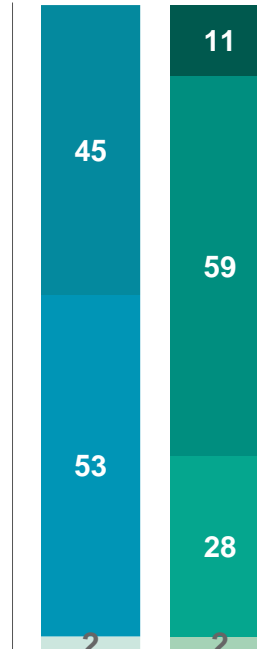
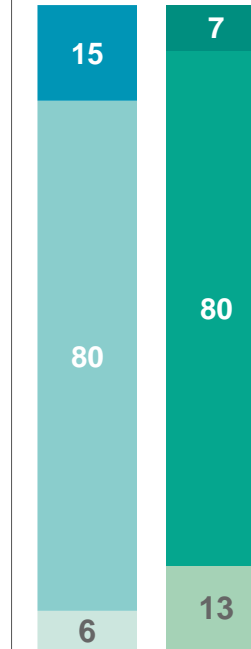
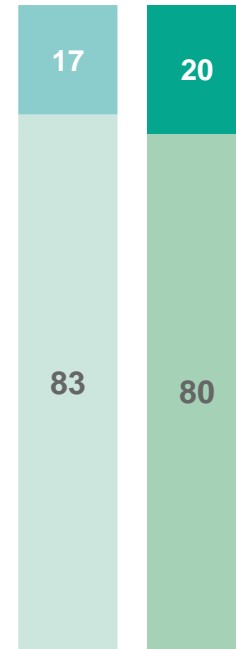
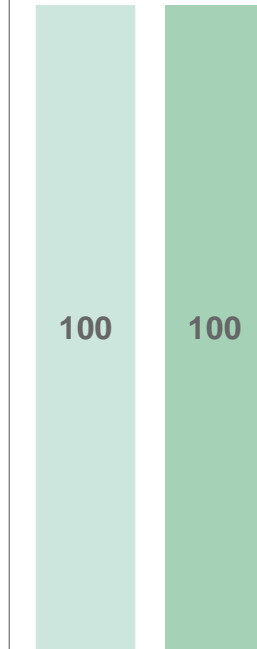
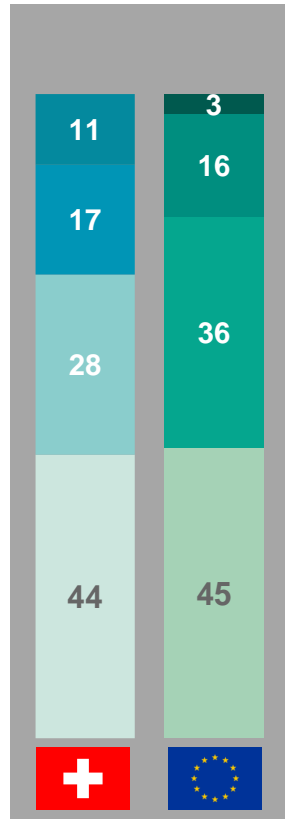
# NUMBER OF LCVS IN FLEET

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 LCVS

# VEHICLES POSSESSION LENGTH



Passenger cars + LCVs

AVERAGE IN YEARS



6.7



5.6

TOTAL



7.1



6.8



6.7



5.9

5.6

5.7

5.6

5.6

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%

# PASSENGER CARS POSSESSION LENGTH



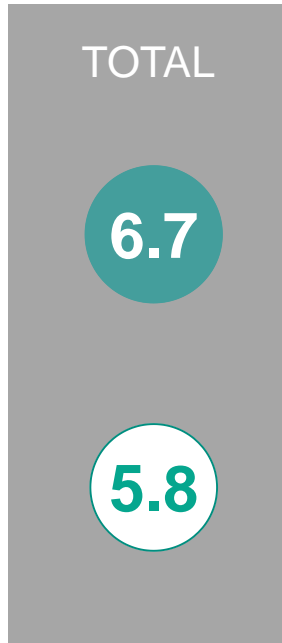
New question added in 2023  
And how long do you keep your passenger cars (before being sold or returned to the leasing company)?  
Basis: companies with passenger cars

# LCVS POSSESSION LENGTH



LCVs

AVERAGE IN YEARS



# FLEET GROWTH POTENTIAL

## HOW TO READ THE RESULTS ?

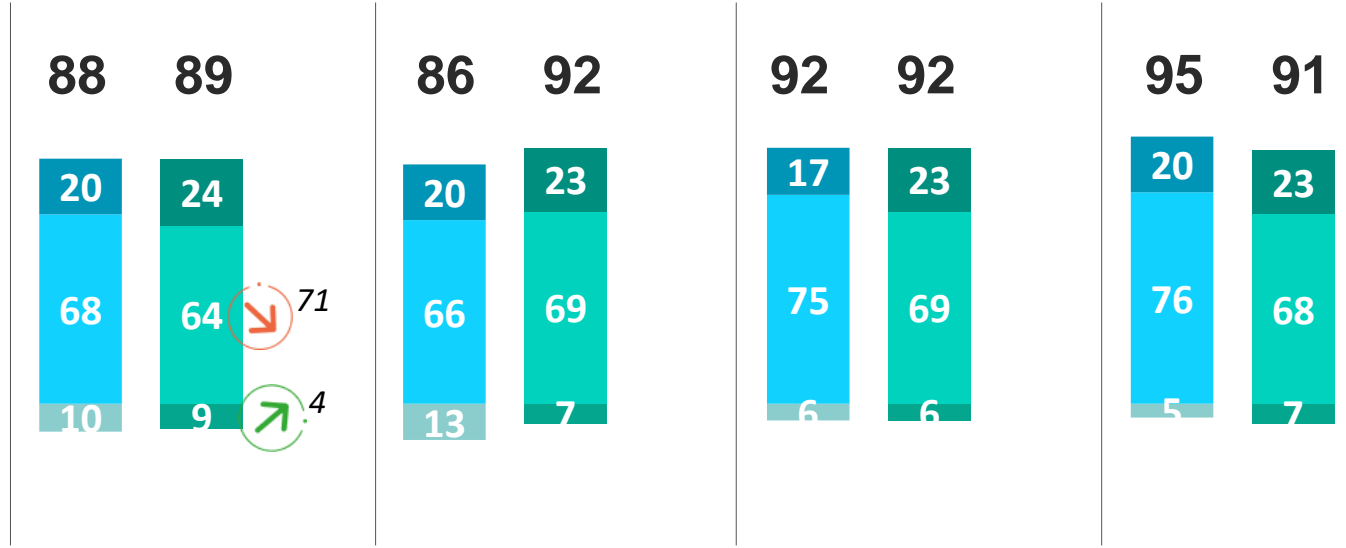
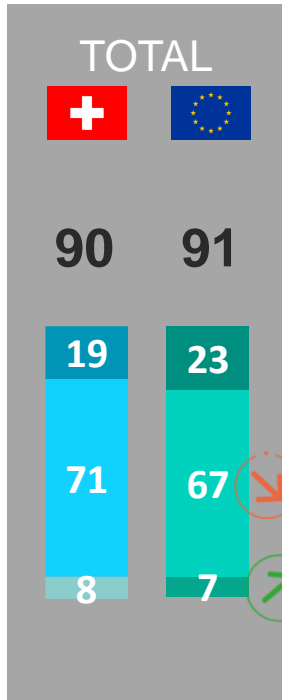
In Switzerland, 90% of the companies declare that in the next 3 years their company fleet will remain stable or increase.

In %



Passenger cars + LCVs

% Stable or increase



**BALANCE in pts (INCREASE ⊖ DECREASE)**



2023	+11	+16	+10	+15	+8	+16	+11	+17	+15	+16
2022	+13	+18	+13	+19	+6	+17	+13	+17	+19	+17
2021	+42	+35	+17	+22	+56	+31	+38	+43	+74	+50

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%



# FLEET GROWTH POTENTIAL

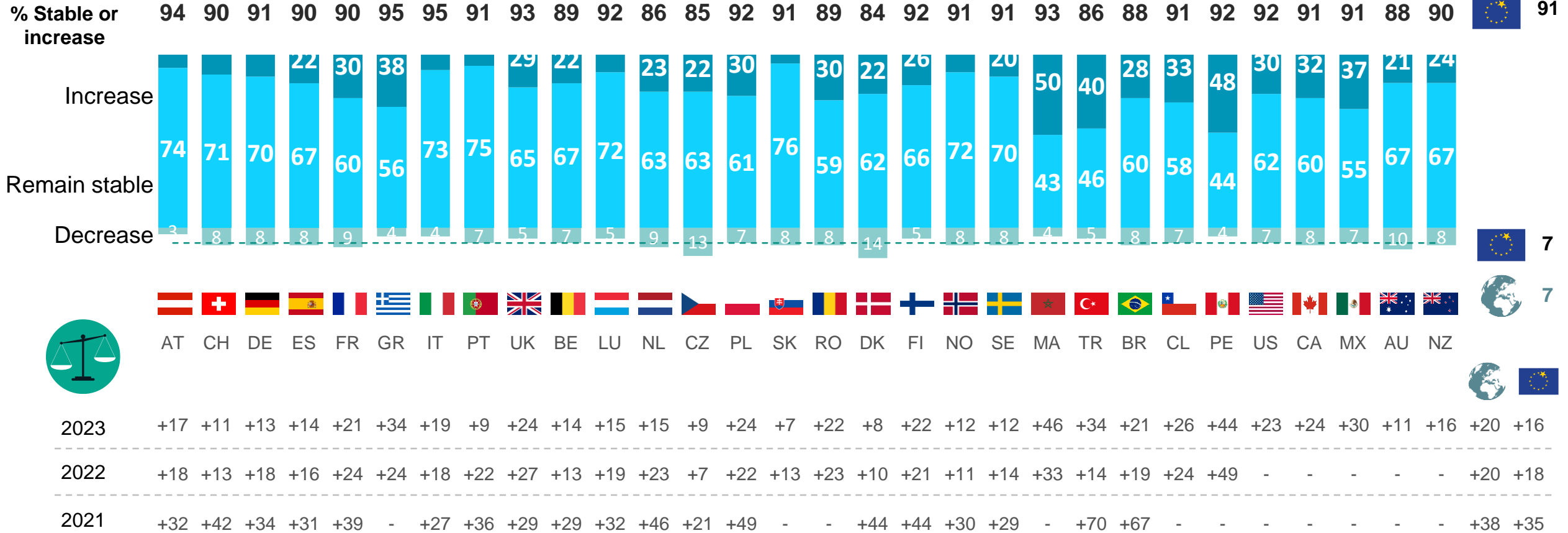
In %



Passenger cars + LCVs

## HOW TO READ THE RESULTS ?

In Switzerland, 90% 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%

# PASSENGER CAR FLEET GROWTH POTENTIAL

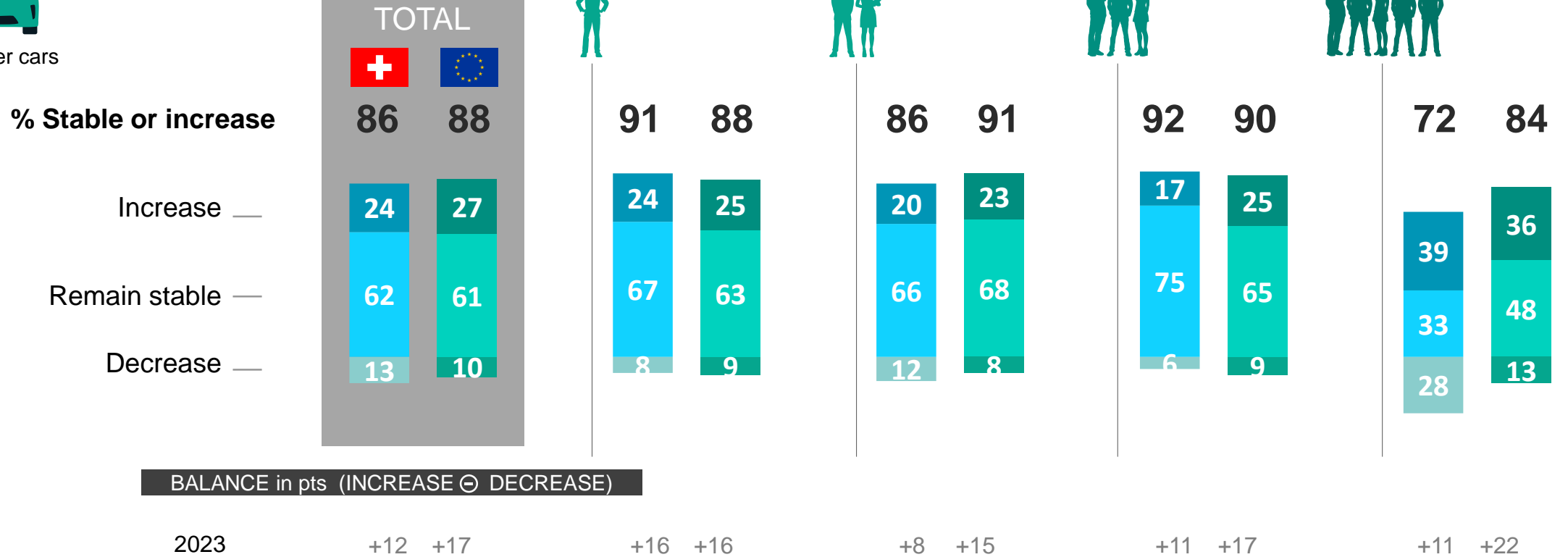
In %



Passenger cars

## HOW TO READ THE RESULTS ?

In Switzerland, 86% of the companies declare that in the next 3 years the total number of passenger cars will remain stable or increase.



New question added in 2023  
 In the next three years, do you think that the total number of your passenger cars will...  
 Basis: companies with passenger cars

# PASSENGER CAR FLEET GROWTH POTENTIAL

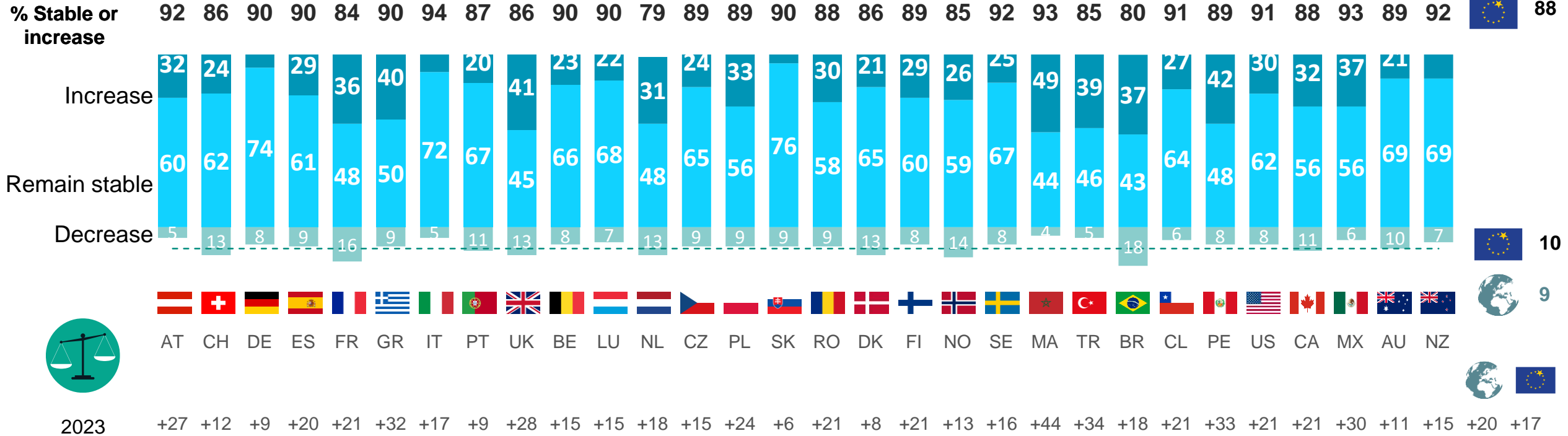
## HOW TO READ THE RESULTS ?

In Switzerland, 86% of the companies declare that in the next 3 years their company fleet of passenger cars will remain stable or increase.

In %



Passenger cars



2023

New question added in 2023

In the next three years, do you think that the total number of your passenger cars will...

Basis: companies with passenger cars

# LCVS FLEET GROWTH POTENTIAL

In %



LCVs

## HOW TO READ THE RESULTS ?

In Switzerland, 86% of the companies declare that in the next 3 years the total number of LCVs will remain stable or increase.

% Stable or increase

TOTAL



86 89

Increase

22 26

Remain stable

64 63

Decrease

13 9

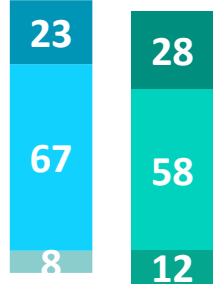
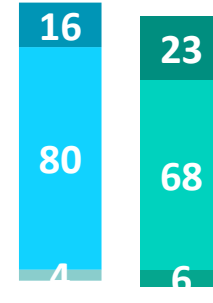
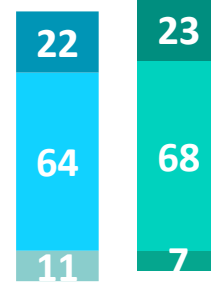


68 88

86 91

96 92

90 86



BALANCE in pts (INCREASE ⊖ DECREASE)

2023

+9 +17

-2 +19

+11 +15

+12 +17

+15 +17

New question added in 2023  
 In the next three years, do you think that the total number of your light commercial vehicles or vans will...  
 Basis: companies with LCVS

# LCVS FLEET GROWTH POTENTIAL

## HOW TO READ THE RESULTS ?

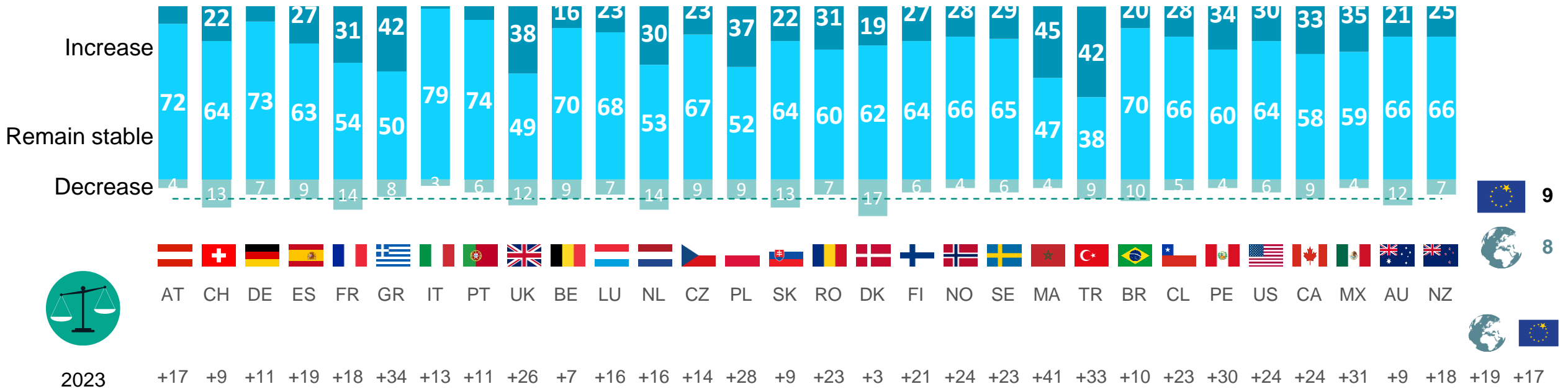
In Switzerland, 86% of the companies declare that in the next 3 years their company fleet of LCVs will remain stable or increase.

In %



LCVs

% Stable or increase



2023

New question added in 2023

In the next three years, do you think that the total number of your light commercial vehicles or vans will...

Basis: companies with LCVs

# REASON FOR FUTURE FLEET INCREASE



In %



Passenger cars + LCVs

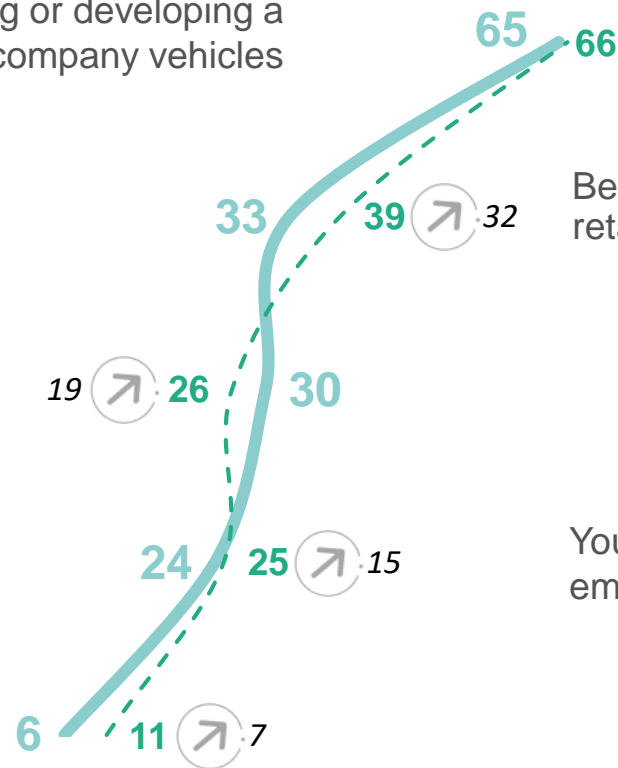
Because your company is growing or developing a new activity that requires company vehicles

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

Because of tax decreases

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

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



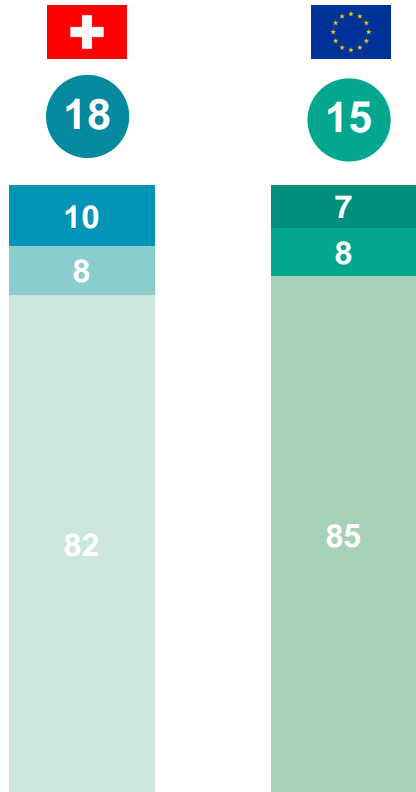
Why do you think the total number of vehicles in your company fleet will increase?  
**Basis: companies expecting an increase of the fleet**

# MOBILITY POLICY ADAPTATION COINCIDING WITH HOMEWORKING

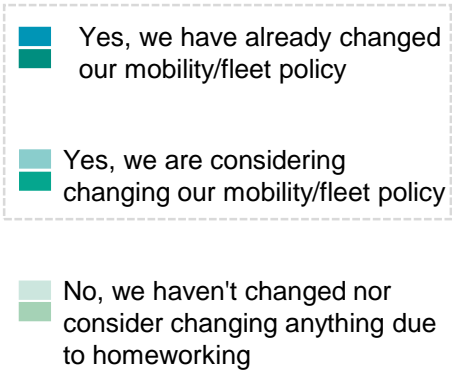
In %



Passenger cars + LCVs

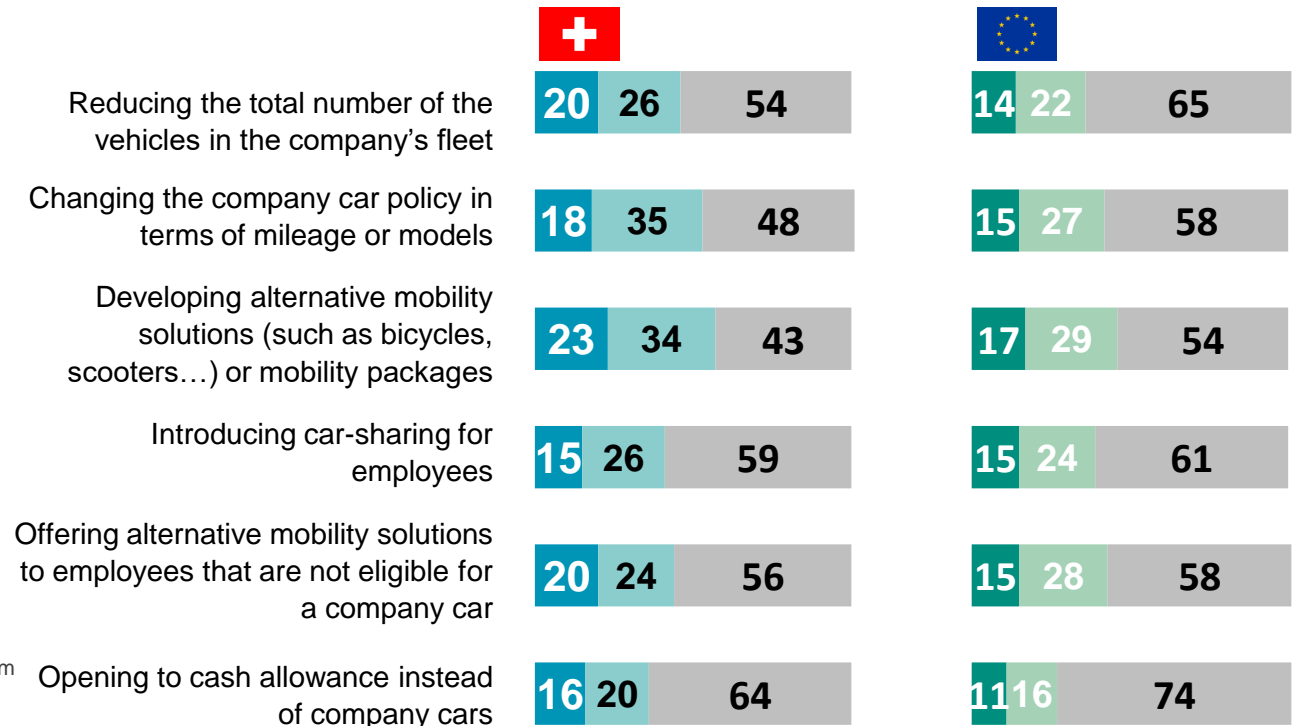


## NET CHANGED THE POLICY OR CONSIDER CHANGING



**HOW TO READ THE RESULTS ?**  
 In Switzerland, among the companies that changed or consider changing their mobility policy, 20% have already reduced the total number of the vehicles in the company's fleet.

Already implemented ■ ■ Considered in the future ■ ■ Not interested ■ ■



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

This question has been asked differently in 2023.

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?

Question asked to respondents that are aware of mobility solutions

Basis: companies with corporate vehicles = 100%

# AVERAGE ANNUAL MILEAGE PER VEHICLE

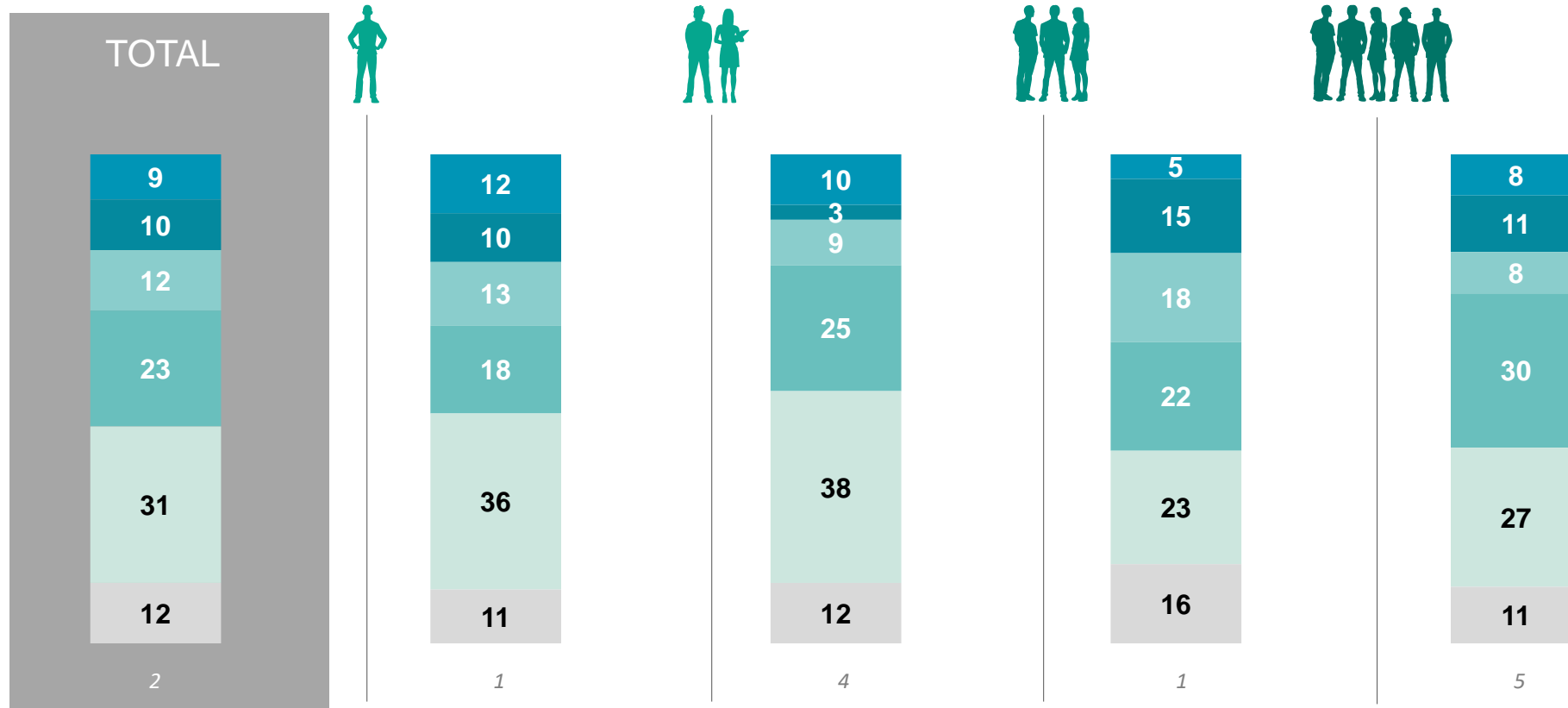
In %



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%



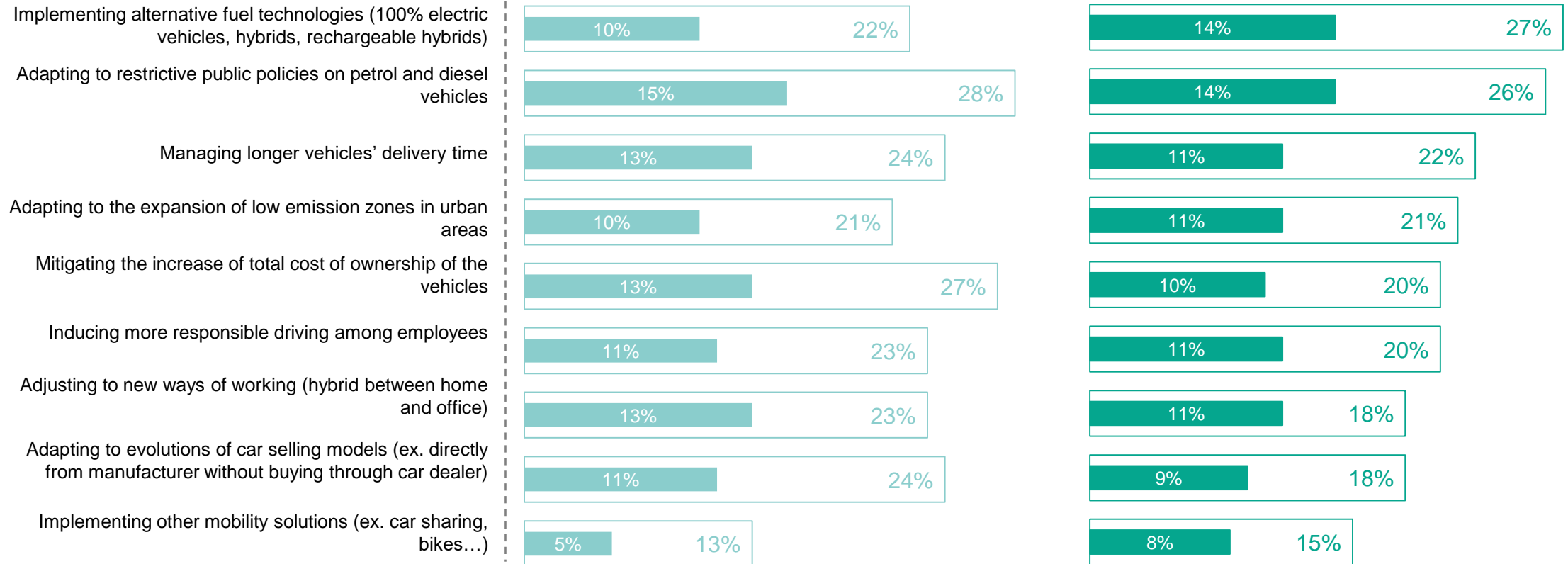
# MOST IMPORTANT CHALLENGES EXPECTED

In %



Passenger cars + LCVs

Nb 1 challenge  
 Top 3 challenges



New question added in 2023

We will now ask you to rank these challenges by order of importance. According to you, what is the most important challenge for the fleet management in the next three years? And what is the second most important challenge?  
Basis: companies with corporate vehicles = 100%

4

# HOW ARE COMPANIES FINANCING THEIR FLEET?



# STILL SOME ROOM FOR GROWTH FOR OPERATING LEASING

*To note: in 2023, question about financing methods repartition was asked differently, which means there will be no direct comparison with 2022.*

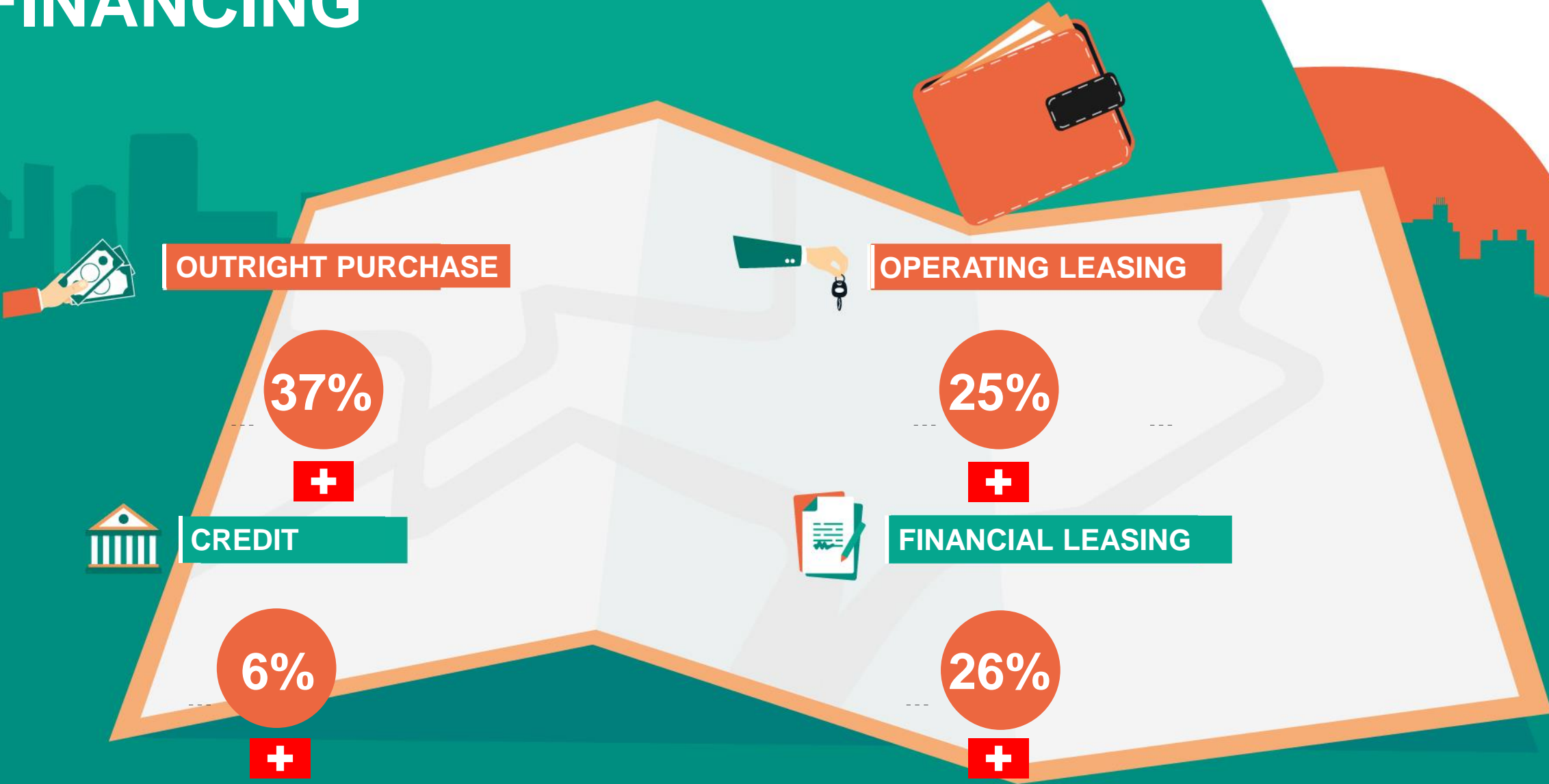
1

- **Operating Leasing is used by 25% of surveyed companies**, for both passenger cars and LCVs.  
But if the share of companies considering to introduce or increase Operating Leasing in the next 3 years remains stable (22%), this potential remains below the European average (34%), showing **some room for growth**.

2

- **Focusing on SMEs, their path to purchase remains strongly driven by direct contact with dealerships** for both vehicle choice and funding information, **independent car dealers being the main subscription channel** (44%), valued for the quality of advice delivered.  
Leasing companies remain significantly behind, showing some room for improvement in terms of partnership with SMEs.

# FINANCING



This question has been asked differently in 2023, no comparison vs 2022

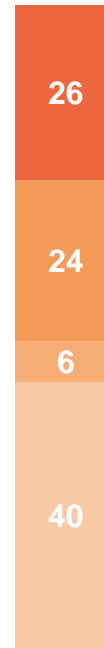
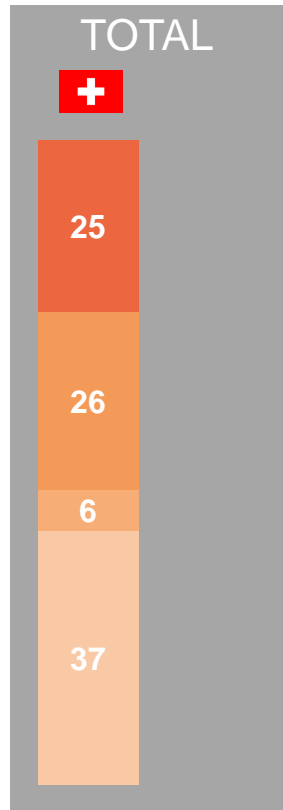
# MAIN FLEET FINANCING METHOD

In %



Passenger cars + LCVs

- Operating leasing ■
- Financial leasing ■
- Credit ■
- Outright purchase ■



**This question has been asked differently in 2023, no comparison vs 2022**

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

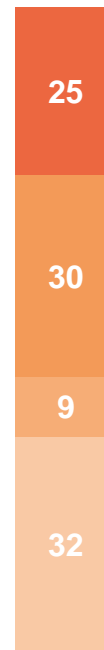
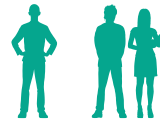
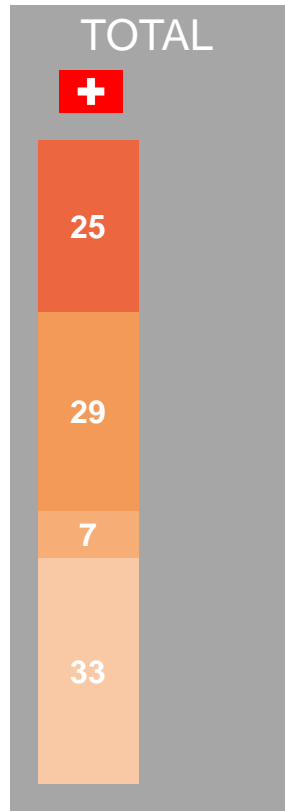
# MAIN PASSENGER CARS FINANCING METHOD

In %



Passenger cars

- Operating leasing ■
- Financial leasing ■
- Credit ■
- Outright purchase ■



New question added in 2023

And what is the main method used to finance your passenger cars today?  
**Basis: companies with passenger cars**

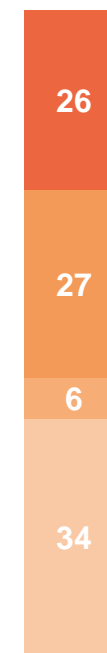
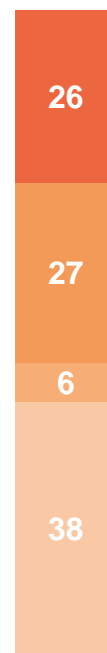
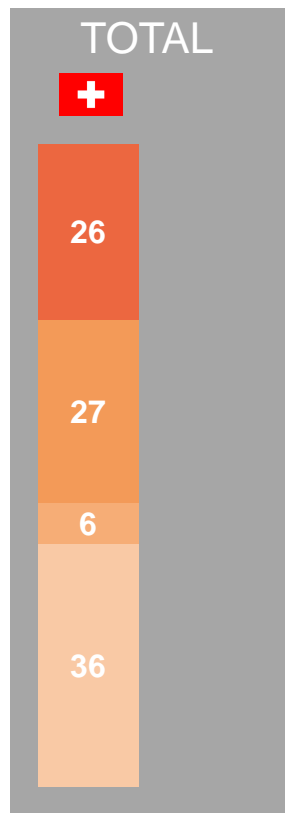
# MAIN LCV FINANCING METHOD

In %



LCVs

- Operating leasing ■
- Financial leasing ■
- Credit ■
- Outright purchase ■



New question added in 2023

And what is the main method used to finance your LCVs today?

**Basis: companies with LCVs**

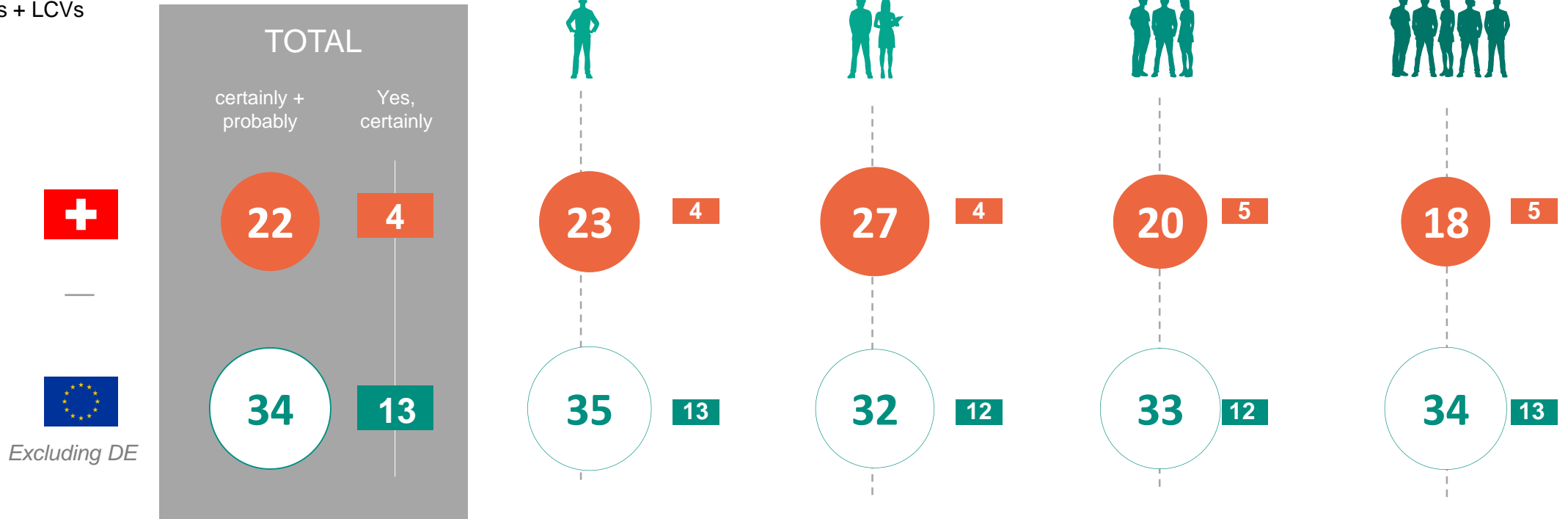
# INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATING LEASING

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

In %



Passenger cars + LCVs

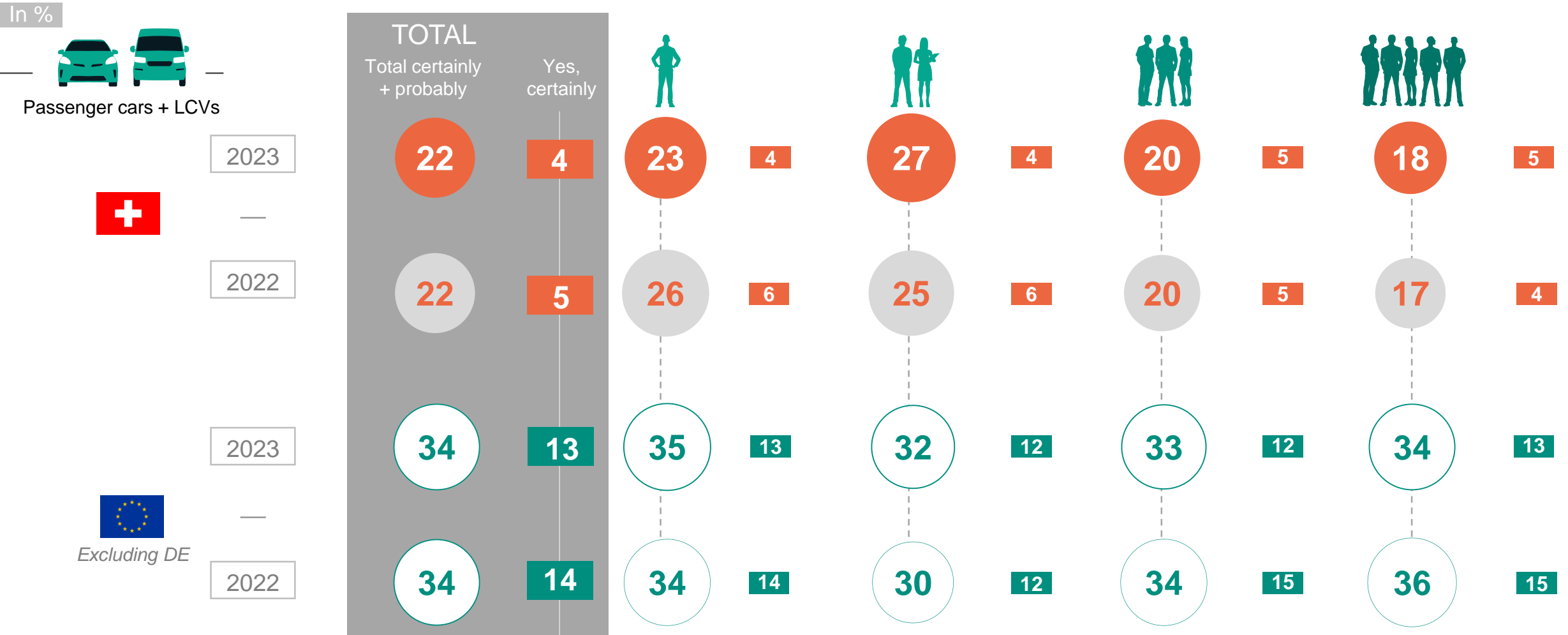


\*All countries except DE: In the next three years do you intend to introduce or increase use of Operating Lease to finance your corporate fleet?  
Basis: companies with corporate vehicles = 100%



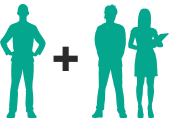
# INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATING LEASING

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



\*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%

# MAIN SOURCE OF INFORMATION FOR VEHICLE CHOICE



Focus 1 to 99

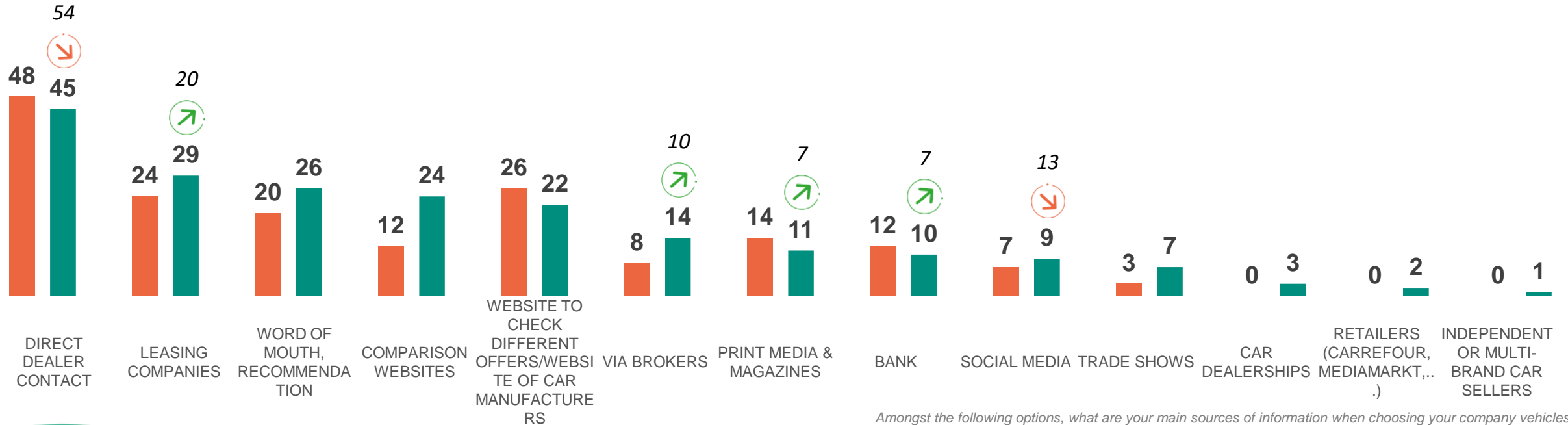
In %



Passenger cars + LCVs



\*BE, FR, UK, PL, CH, CZ, IT



Amongst the following options, what are your main sources of information when choosing your company vehicles?

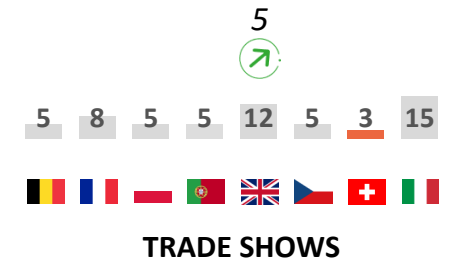
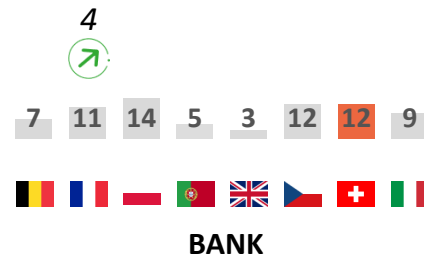
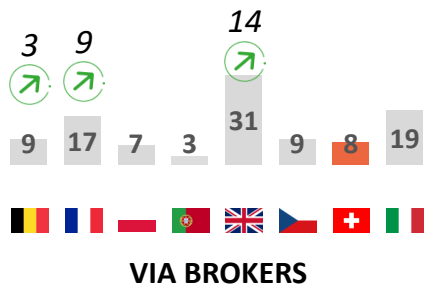
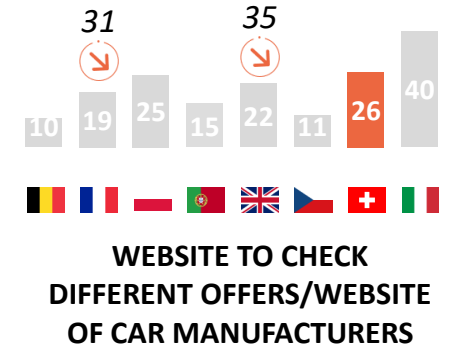
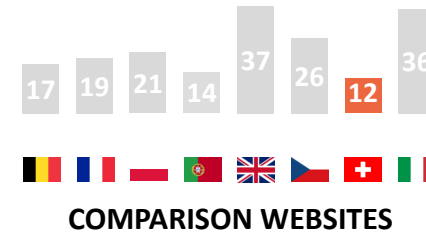
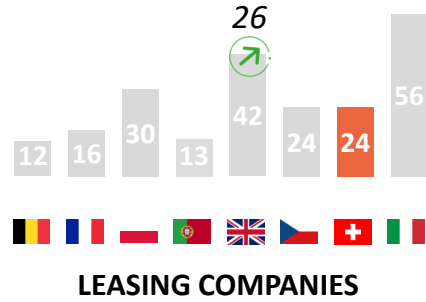
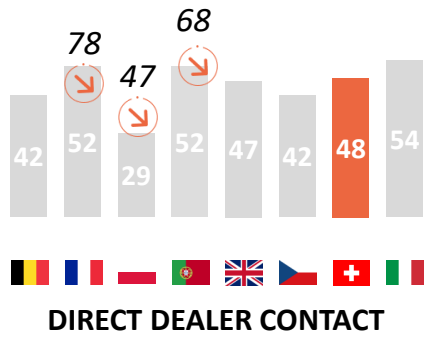
**Basis: companies with less than 100 employees**

# MAIN SOURCE OF INFORMATION FOR VEHICLE CHOICE

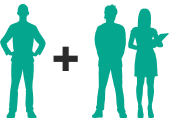
In %



Passenger cars + LCVs



# MAIN SOURCE OF INFORMATION FOR FUNDING METHOD



Focus 1 to 99

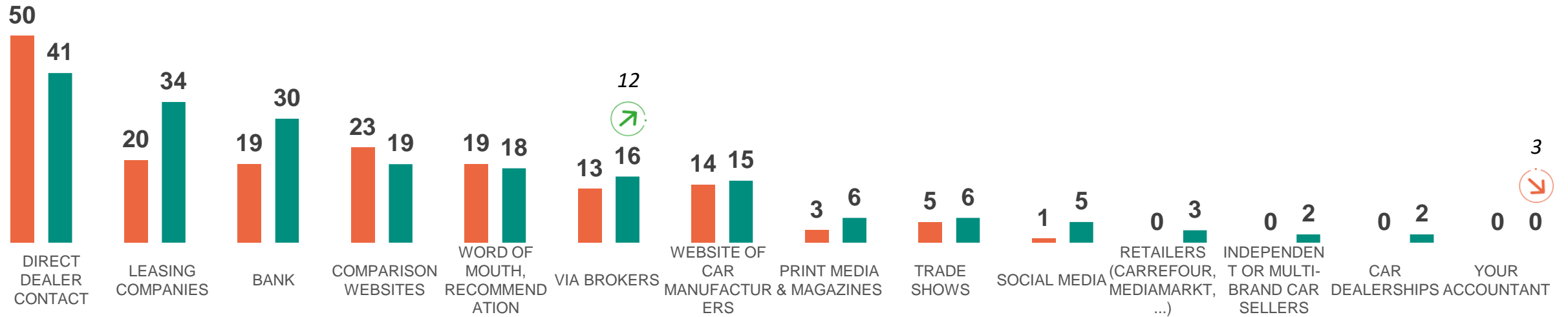
In %



Passenger cars + LCVs



\*BE, FR, UK, PL, CH, CZ, IT



Amongst the following options, what are your main sources of information when choosing a funding method for your company vehicles?

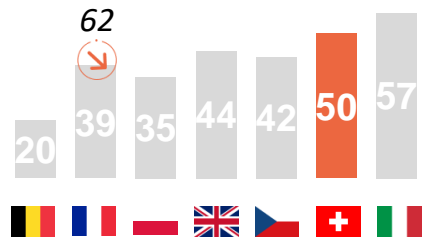
**Basis: companies with less than 100 employees**

# MAIN SOURCE OF INFORMATION FOR FUNDING METHOD

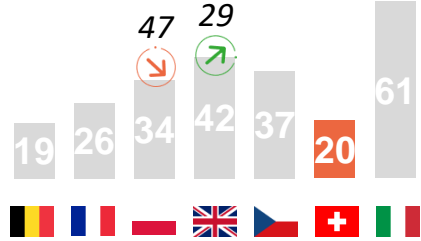
In %



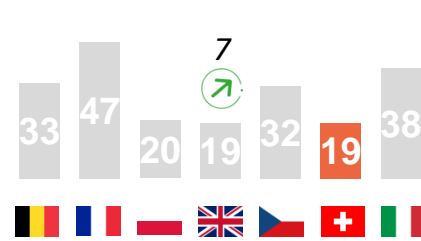
Passenger cars + LCVs



DIRECT DEALER CONTACT



LEASING COMPANIES



BANK



COMPARISON WEBSITES



WORD OF MOUTH, RECOMMENDATION



VIA BROKERS



WEBSITE OF CAR MANUFACTURERS



PRINT MEDIA & MAGAZINES



TRADE SHOWS



SOCIAL MEDIA

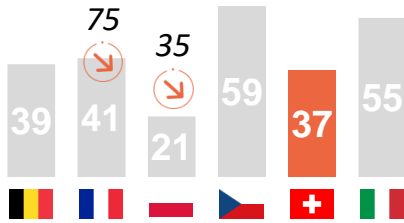
Amongst the following options, what are your main sources of information when choosing a funding method for your company vehicles?  
Basis: companies with less than 100 employees

# SUBSCRIPTION CHANNEL

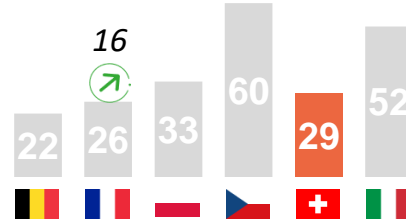
In %



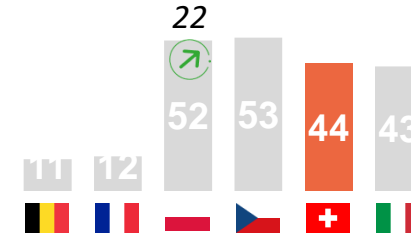
Passenger cars + LCVs



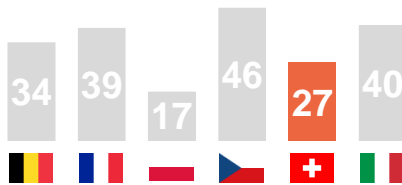
CAR MANUFACTURER DEALERSHIPS



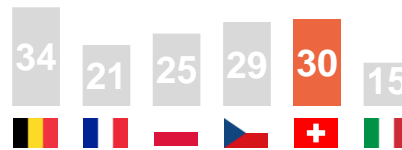
LEASING COMPANIES



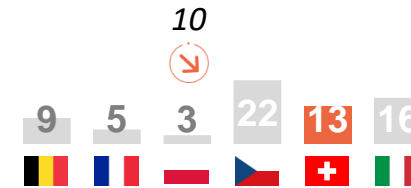
INDEPENDENT CAR DEALERS



YOUR BANK



INTERNET

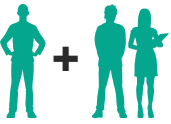


VIA BROKERS

Once you have decided the company vehicle and the funding method, from the following channels, where do you go next to subscribe the chosen solution?

**Basis: companies with less than 100 employees**

# IMPORTANCE OF ONLINE SOURCES FOR VEHICLE CHOICE



Focus 1 to 99

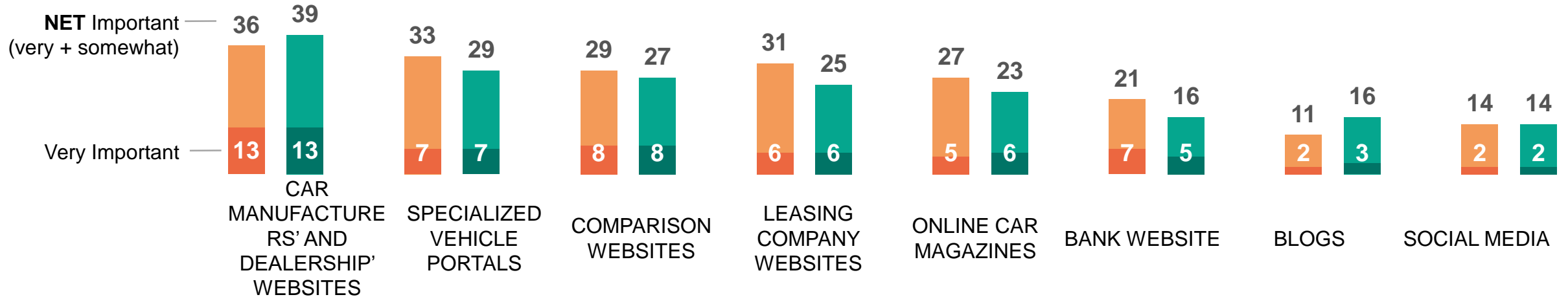
In %



Passenger cars + LCVs

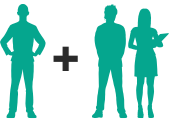


SME Benchmark\*  
\*BE, FR, PL, CH, CZ



For each of the following sources of information, please tell us whether it is very, somewhat, quite not, not at all important to you to choose a company vehicle.  
Basis: companies with less than 100 employees

# IMPORTANCE OF ONLINE SOURCES FOR FUNDING METHOD



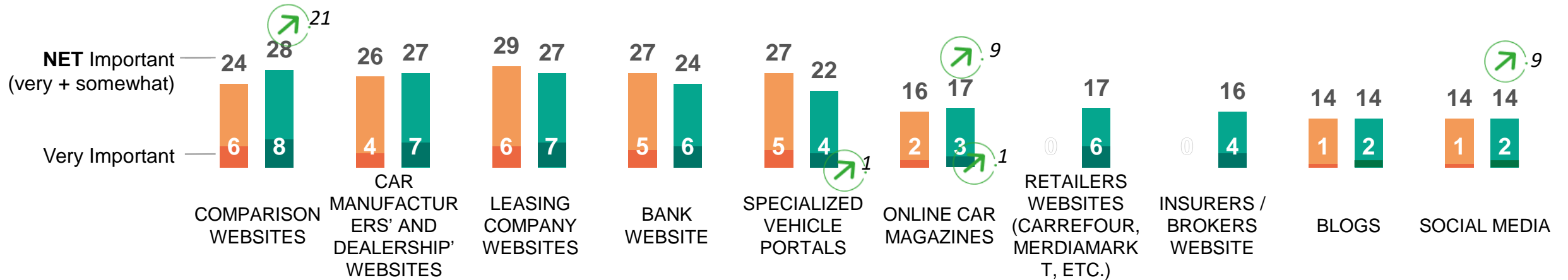
Focus 1 to 99

In %



Passenger cars + LCVs

SME Benchmark\*  
\*BE, FR, PL, CH, CZ

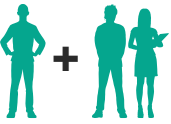


For each of the following sources of information, please tell us whether it is very, somewhat, quite not, not at all important to you to choose a funding method.  
Basis: companies with less than 100 employees



# SUMMARY OF VEHICLE PURCHASING PATH

## Focus 1 to 99



In %



Passenger cars + LCVs

#1 source of information for vehicle choice:

Direct dealer contact

48

#1 source of information for car funding:

Direct dealer contact

50

# 1 subscription channel:

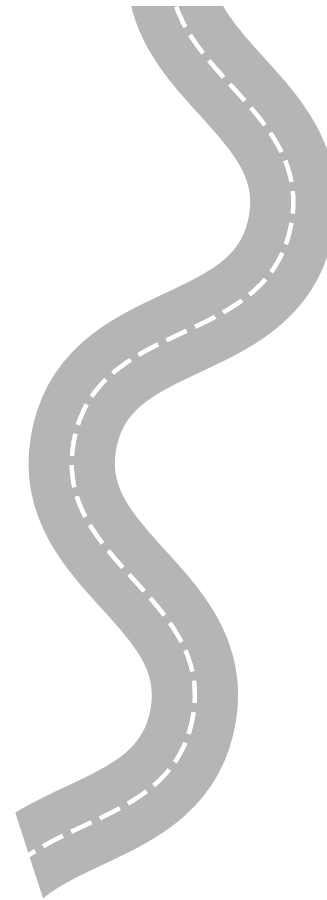
Independent car dealers

44

Main advantage of this buying channel:

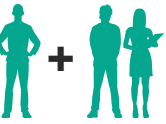
Quality of advice

62



# LEASING COMPANIES AS PREFERRED SOURCE

Focus 1 to 99



In %



Passenger cars + LCVs



Leasing companies as preferred source of information for...

Vehicle choice

24

Funding method

20

29 ↗ 20

\* BE, FR, PL, UK, CH, CZ, IT

34

\* BE, FR, PL, UK, CH, CZ, IT

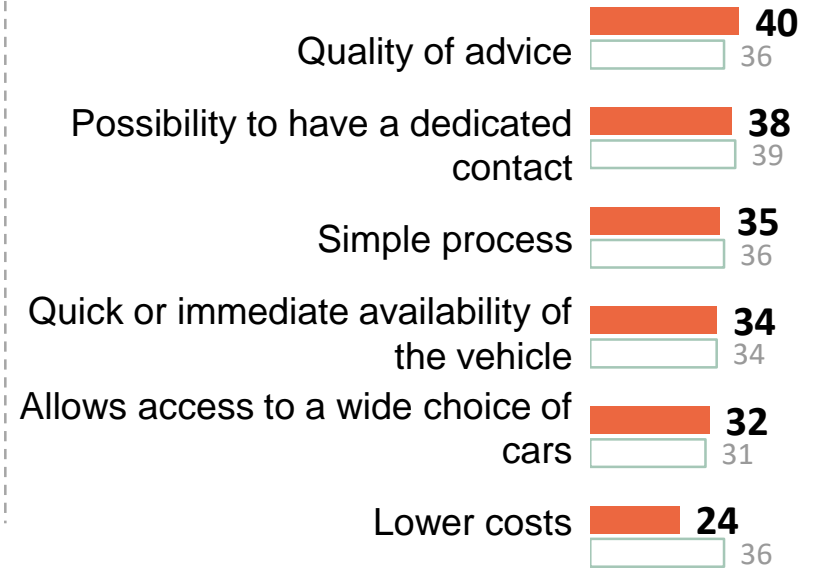
Subscription via Leasing companies

29

37 ↗ 23

\* BE, FR, PL, CH, CZ, IT

Perceived advantages (among company subscribing via Leasing companies)



\* BE, FR, PL, CH, CZ, IT

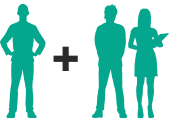


Amongst the following options, what are your main sources of information when choosing your company vehicles?  
 Amongst the following options, what are your main sources of information when choosing a funding method for your company vehicles?  
 Once you have decided the company vehicle and the funding method, from the following channels, where do you go next to subscribe the chosen solution?  
 In your opinion, what are the advantages of each of the following buying channels?

**Basis: companies with less than 100 employees**

# BANK AS PREFERRED SOURCE

Focus 1 to 99



In %



Passenger cars + LCVs



## Bank as preferred source of information for...

Vehicle choice

Funding method



12

19

10

↑ 7

30

\* BE, FR, PL, UK, CH, CZ, IT

\* BE, FR, PL, UK, CH, CZ, IT

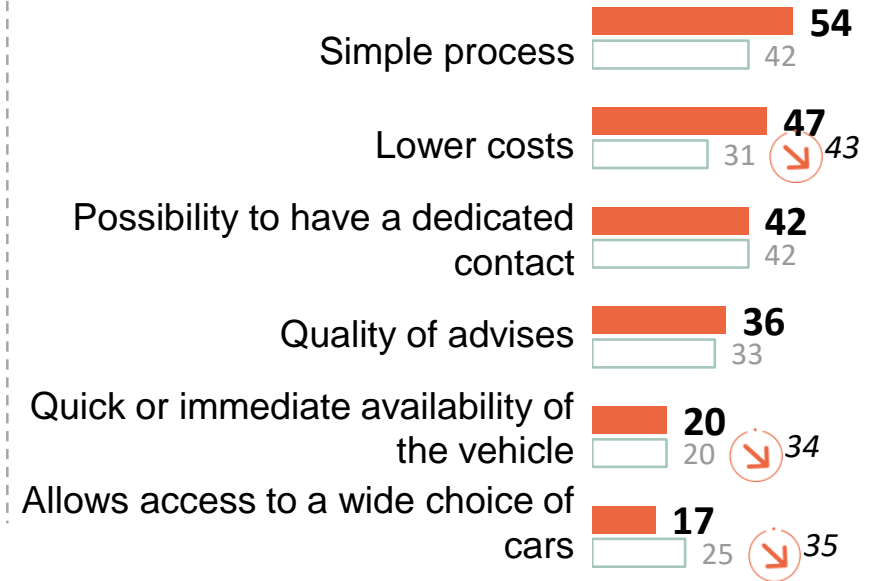
## Subscription via the bank

27

34 ↑ 24

\* BE, FR, PL, CH, CZ, IT

## Perceived advantages (among company subscribing via the bank)



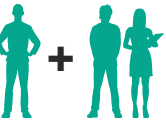
\* BE, FR, PL, CH, CZ, IT

Amongst the following options, what are your main sources of information when choosing your company vehicles?  
 Amongst the following options, what are your main sources of information when choosing a funding method for your company vehicles?  
 Once you have decided the company vehicle and the funding method, from the following channels, where do you go next to subscribe the chosen solution?  
 In your opinion, what are the advantages of each of the following buying channels?

**Basis: companies with less than 100 employees**

# BROKERS AS PREFERRED SOURCE

Focus 1 to 99



In %



Passenger cars + LCVs

## Brokers as preferred source of information for...

Vehicle choice

Funding method



8

13



\* BE, FR, PL, UK, CH, CZ, IT

\* BE, FR, PL, UK, CH, CZ, IT

## Subscription via Brokers



\* BE, FR, PL, CH, CZ, IT

## Perceived advantages (among company subscribing via Brokers)

Allows access to a wide choice of cars *Low basis*  40

Simple process *Low basis*  38

Quality of advises *Low basis*  40

Possibility to have a dedicated contact *Low basis*  37

Lower costs *Low basis*  30

Quick or immediate availability of the vehicle *Low basis*  22

\* BE, FR, PL, CH, CZ, IT

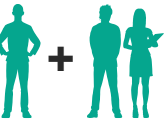


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 Amongst the following options, what are your main sources of information when choosing a funding method for your company vehicles?  
 Once you have decided the company vehicle and the funding method, from the following channels, where do you go next to subscribe the chosen solution?  
 In your opinion, what are the advantages of each of the following buying channels?

**Basis: companies with less than 100 employees**

# OTHER SOURCES OF INFORMATION

## Focus 1 to 99



In %



Passenger cars + LCVs

### DIRECT DEALER CONTACT

### TRADE SHOWS

Main source of information for...

Main source of information for...

Vehicle choice

Funding method

Vehicle choice

Funding method



48

50

3

5

SME Benchmark\*



45

54

41

7

6

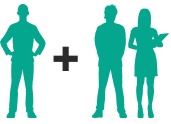
\* BE, FR, PL, UK, CH, CZ, IT

Amongst the following options, what are your main sources of information when choosing your company vehicles?  
Amongst the following options, what are your main sources of information when choosing a funding method for your company vehicles?

**Basis: companies with less than 100 employees**

# OTHER SOURCES OF INFORMATION

## Focus 1 to 99



In %



Passenger cars + LCVs

### WEBSITES OF CAR MANUFACTURERS

### COMPARISON WEBSITES

Main source of information for...

Main source of information for...

Vehicle choice

Funding method

Vehicle choice

Funding method



26

14

12

23

SME Benchmark\*



22

15

24

19

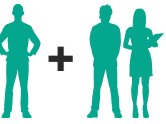
\* BE, FR, PL, UK, CH, CZ, IT

Amongst the following options, what are your main sources of information when choosing your company vehicles?  
Amongst the following options, what are your main sources of information when choosing a funding method for your company vehicles?

**Basis: companies with less than 100 employees**

# OTHER SOURCES OF INFORMATION

## Focus 1 to 99



In %



Passenger cars + LCVs

### PRINT & MEDIA MAGAZINES

### SOCIAL MEDIA

Main source of information for...

Main source of information for...

Vehicle choice

Funding method

Vehicle choice

Funding method



14

3

7

1

SME Benchmark\*



11 ↗ 7

6

9 ↘ 13

5

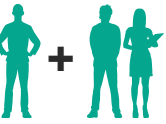
\* BE, FR, PL, UK, CH, CZ, IT

Amongst the following options, what are your main sources of information when choosing your company vehicles?  
Amongst the following options, what are your main sources of information when choosing a funding method for your company vehicles?

**Basis: companies with less than 100 employees**

# OTHER SOURCES OF INFORMATION

Focus 1 to 99



In %



Passenger cars + LCVs

WORD OF MOUTH

Main source of information for...

Vehicle choice

Funding method



20

19

SME Benchmark\*



26

18

\* BE, FR, PL, UK, CH, CZ, IT

Amongst the following options, what are your main sources of information when choosing your company vehicles?  
Amongst the following options, what are your main sources of information when choosing a funding method for your company vehicles?

**Basis: companies with less than 100 employees**



5

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



# IF ALTERNATIVE TECHNOLOGIES KEEP INCREASING FOR PASSENGER CARS, BEV ADOPTION REMAINS MUCH SLOWER FOR LCVS

1

● **Adoption of alternative technologies is increasing substantially this year**, with nearly 6 out of 10 companies already using at least one technology among Hybrid, Plug-in Hybrid or 100% BEV in their passenger car fleet (on par with the European average), and 84% already using or considering them (above the European benchmark).

In detail, **Hybrid is the most used and considered technology, significantly increasing compared to last year (34% used, +14 points), followed by 100% BEV (26%) and Plug-in Hybrid (24%),** which are both consolidating and quite in line with European figures.

**100% BEV adoption remains much more limited and stable for LCVs**, with 7% of current use, 27% of use or consider, larger companies remaining ahead of smaller ones in terms of consideration.

Lastly, **Hydrogen Fuel Cell for LCVs remains marginal**, used by only 1% of companies with LCVs, while 6% consider it.

2

● **Slightly different motivations for alternative technologies adoption between passenger cars and LCVs: if CSR compliance still ranks first among the top motivations for both**, with still a higher score than in Europe, their **lower environmental impact** is also a key driver for passenger cars but not for LCVs, while **reduction of fuel expenses and company image** remain important motivations, confirming last year's trends.

3

● **Access to charging points remains the strongest barrier to BEV usage**, but generally speaking, the perception of barriers to BEV adoption is decreasing this year, which tends to show a "normalization" of BEV. **Higher purchase prices and limited choice of models** also appear as limitations to BEV adoption.

To address these barriers and support the adoption of 100% BEV, **more companies plan to equip their premises with charging points** within the next 12 months, but also, for those who don't plan to install charging points, **develop lump sum payments** to employees to cover charging fees.

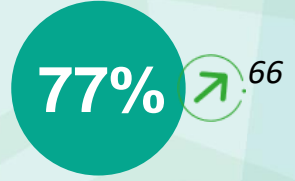
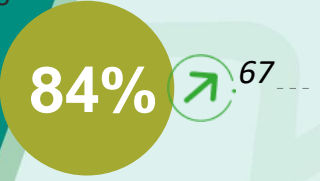
# ENERGY MIX



**AT LEAST ONE ALTERNATIVE  
IMPLEMENTED OR CONSIDERED\***

for Passenger cars

ALREADY  
USING OR  
CONSIDER  
USING IN THE  
NEXT 3 YEARS

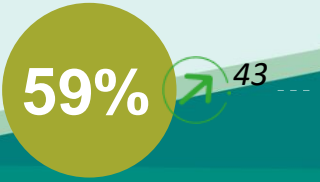


**EXPECTED PART OF 100%  
ELECTRIC PASSENGER CAR IN 3 YEARS**



**AT LEAST ONE ALTERNATIVE  
IMPLEMENTED**

for Passenger cars



**EXPECTED PART OF 100%  
ELECTRIC LCV IN 3 YEARS**



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

This question has been asked differently in 2023

# CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

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

In %



Passenger cars

## HOW TO READ THE RESULTS ?

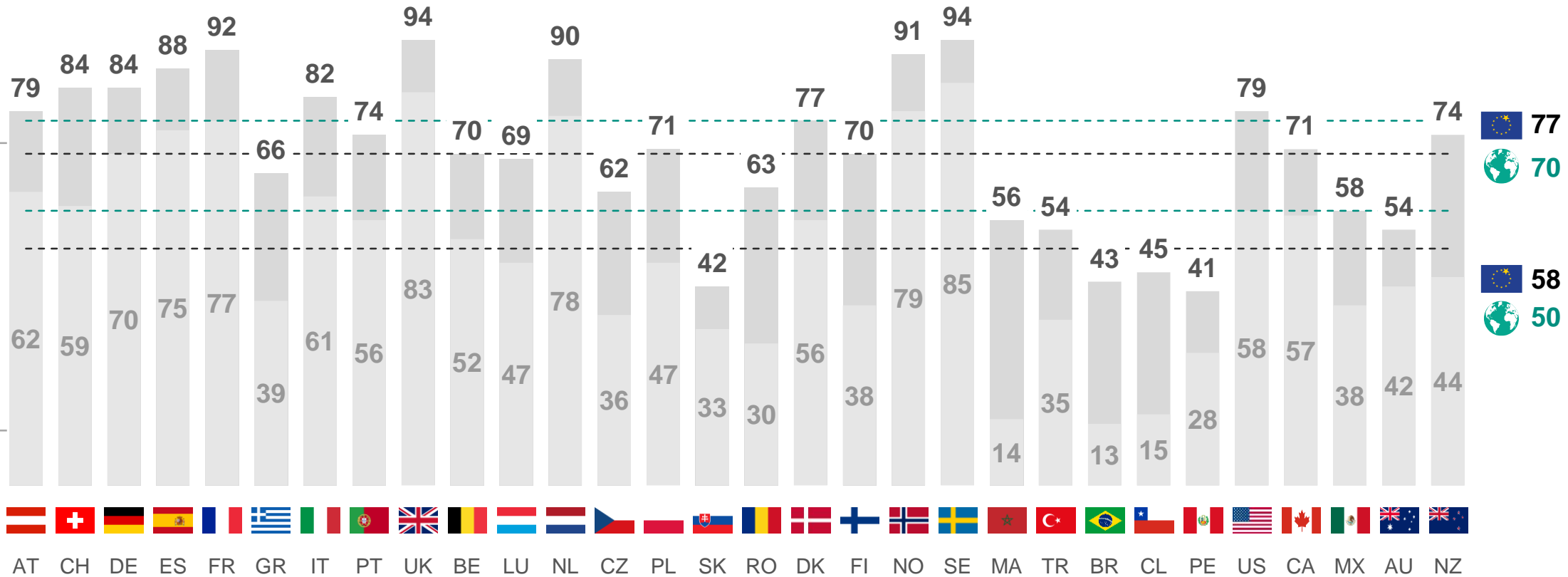
In Switzerland, 84% of the companies are already using or consider to implement at least one alternative technology in the next 3 years. 59% of the companies is currently using at least one



ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS



ALREADY USING



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 %

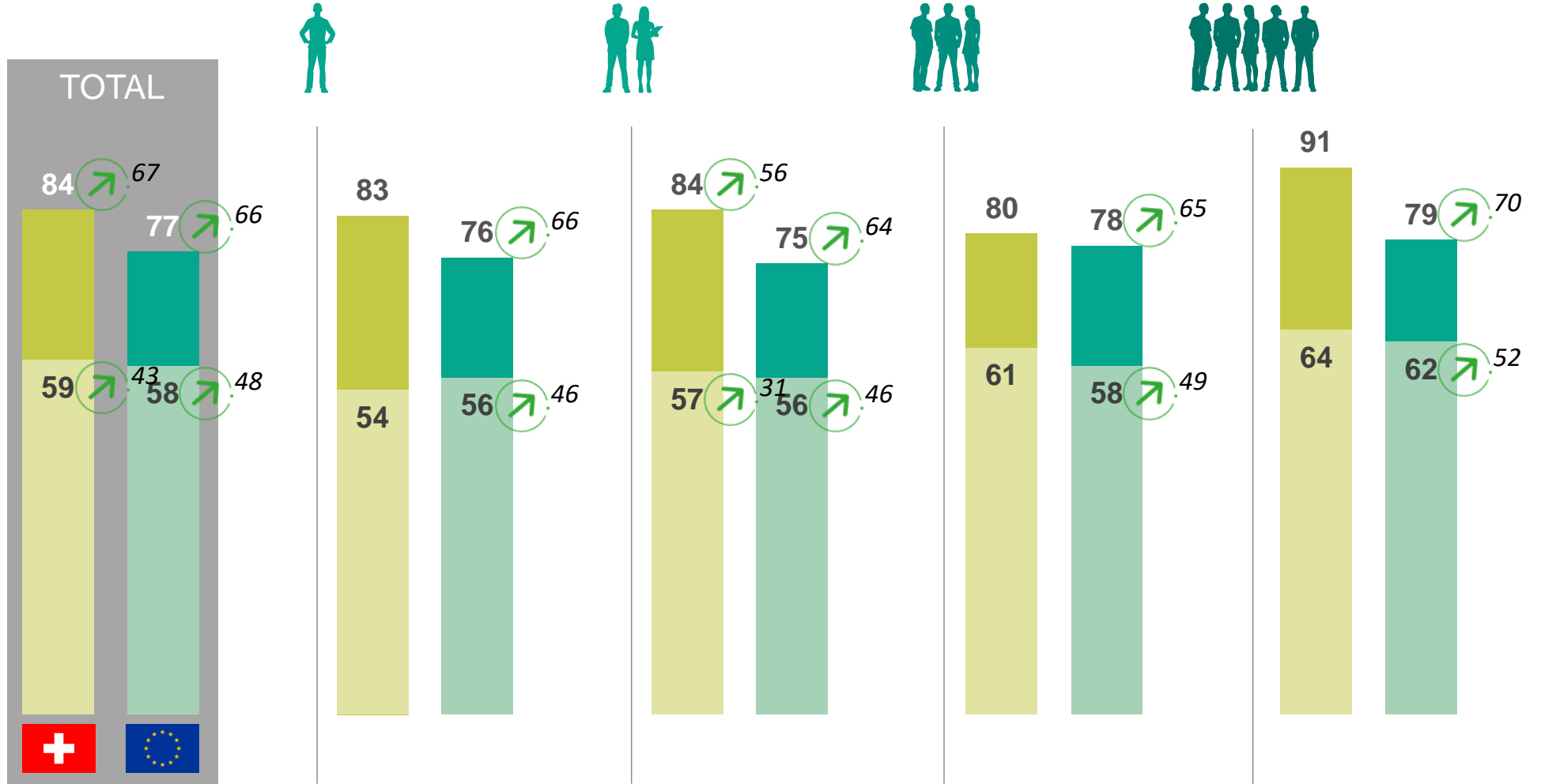
Passenger cars



ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS



ALREADY USING



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

Evolution vs. previous years

In %



Passenger cars



ALREADY USING OR  
CONSIDER USING IN  
THE NEXT 3 YEARS



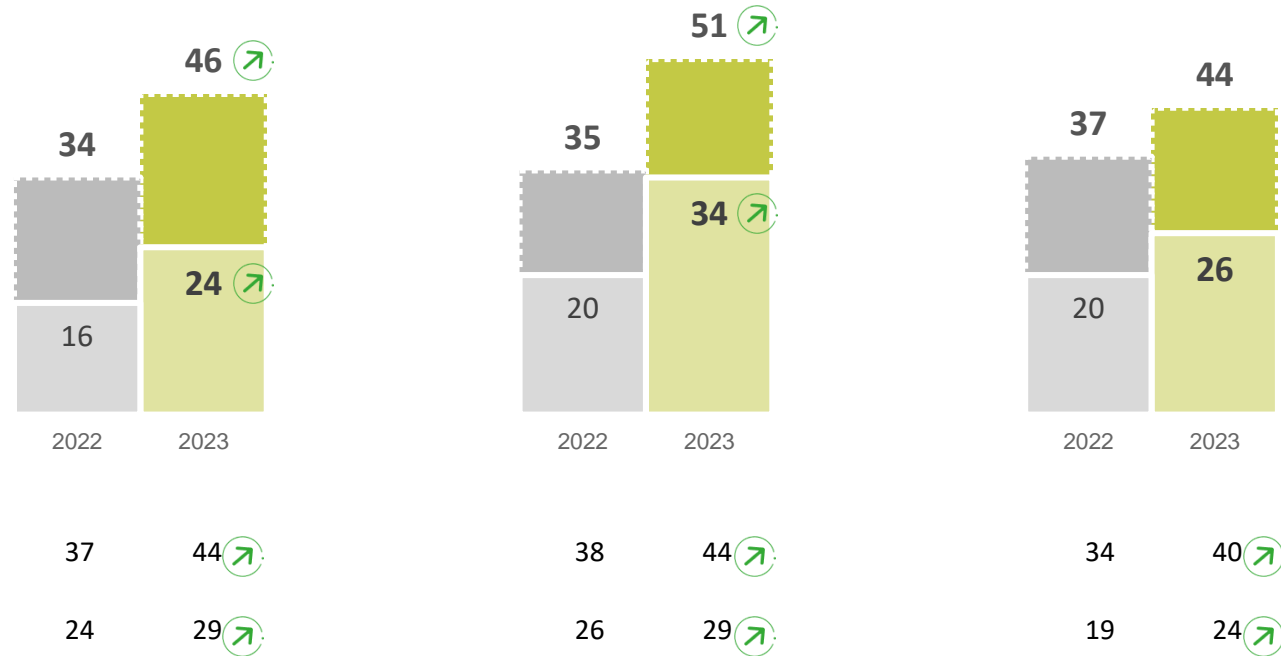
ALREADY  
USING



Plug-in Hybrid

Hybrid

100% Battery  
Electric Vehicle



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

Evolution vs. previous years – Focus Less than 10 empl.

In %



Passenger cars



ALREADY USING OR  
CONSIDER USING IN  
THE NEXT 3 YEARS



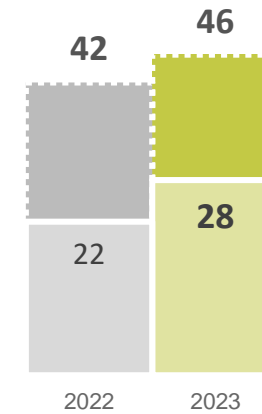
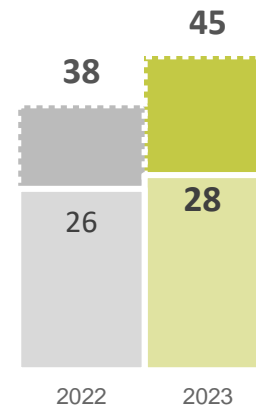
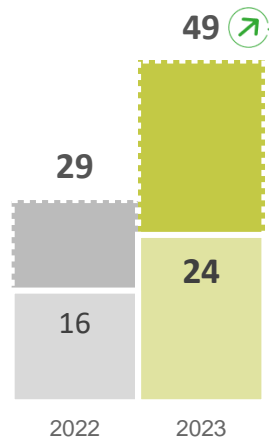
ALREADY  
USING



Plug-in Hybrid

Hybrid

100% Battery  
Electric Vehicle



36 44 ↗  
22 30 ↗

36 42 ↗  
25 27

32 39 ↗  
18 22 ↗

# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years – Focus 10 - 99 empl.

In %



Passenger cars



ALREADY USING OR  
CONSIDER USING IN  
THE NEXT 3 YEARS

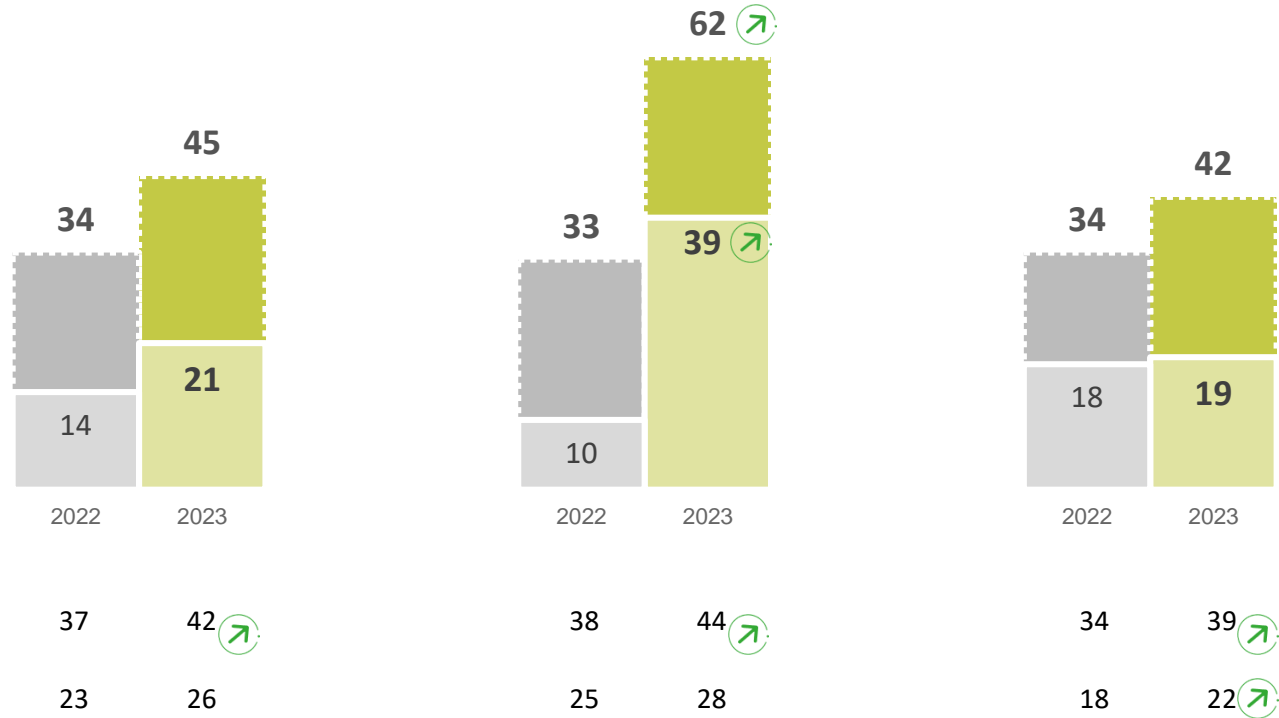


ALREADY  
USING

Plug-in Hybrid

Hybrid

100% Battery  
Electric Vehicle



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

Evolution vs. previous years – Focus 100 - 499 empl.

In %



Passenger cars



ALREADY USING OR  
CONSIDER USING IN  
THE NEXT 3 YEARS



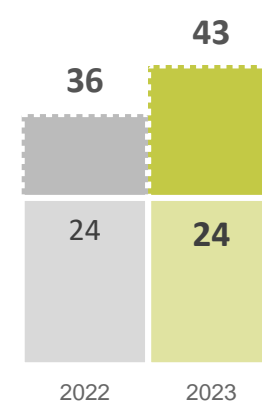
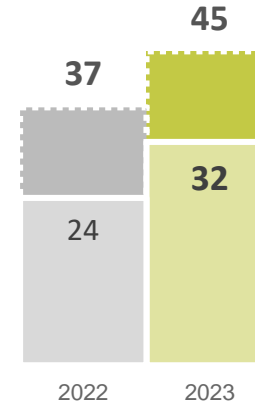
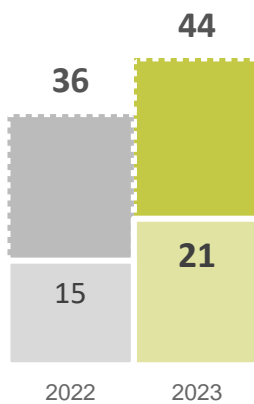
ALREADY  
USING



Plug-in Hybrid

Hybrid

100% Battery  
Electric Vehicle



37 44 ↗  
26 29

40 43  
28 31

35 42 ↗  
20 24 ↗

# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years – Focus 500 empl. or more

In %



Passenger cars



ALREADY USING OR  
CONSIDER USING IN  
THE NEXT 3 YEARS



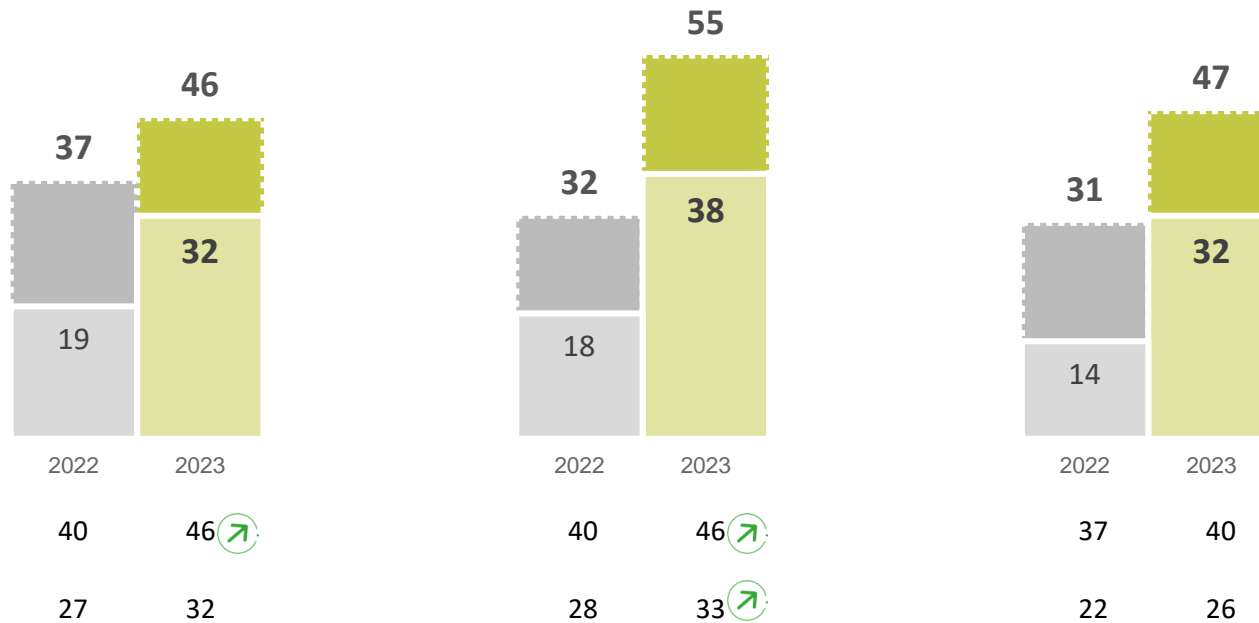
ALREADY  
USING



Plug-in Hybrid

Hybrid

100% Battery  
Electric Vehicle



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

Evolution vs. previous years – Focus on 1 to 99

In %



Passenger cars



+



ALREADY USING OR  
CONSIDER USING IN  
THE NEXT 3 YEARS



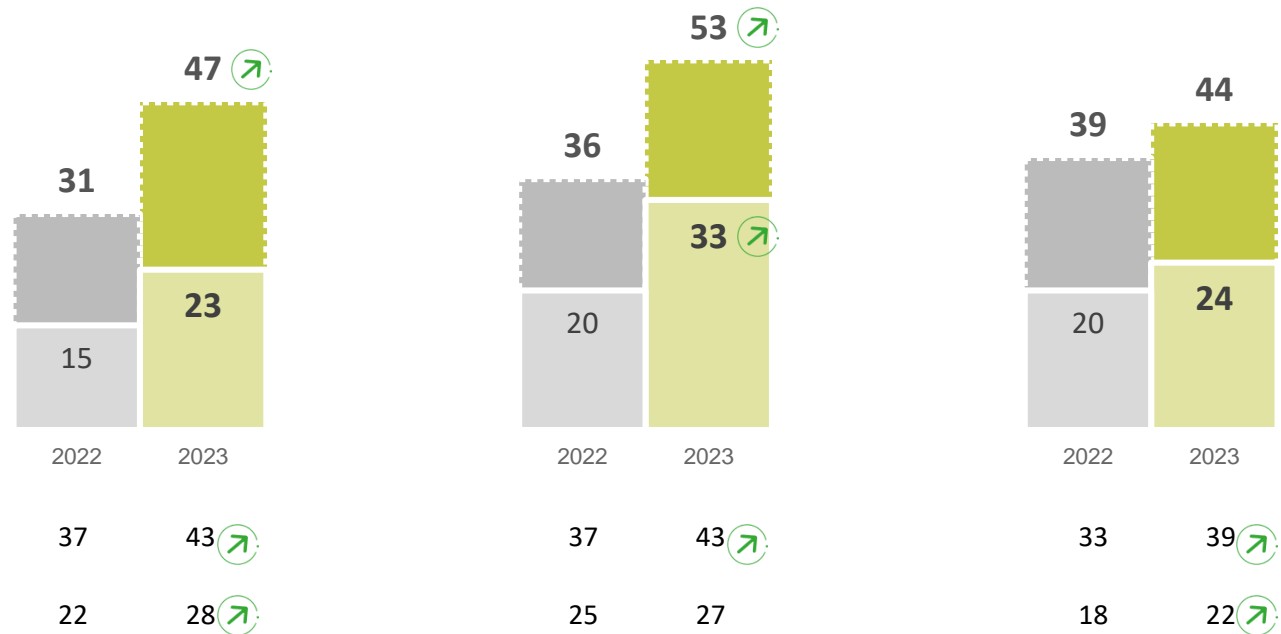
ALREADY  
USING



Plug-in Hybrid

Hybrid

100% Battery  
Electric Vehicle



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

Evolution vs. previous years – Focus on 100 and more

In %



Passenger cars



+



ALREADY USING OR  
CONSIDER USING IN  
THE NEXT 3 YEARS



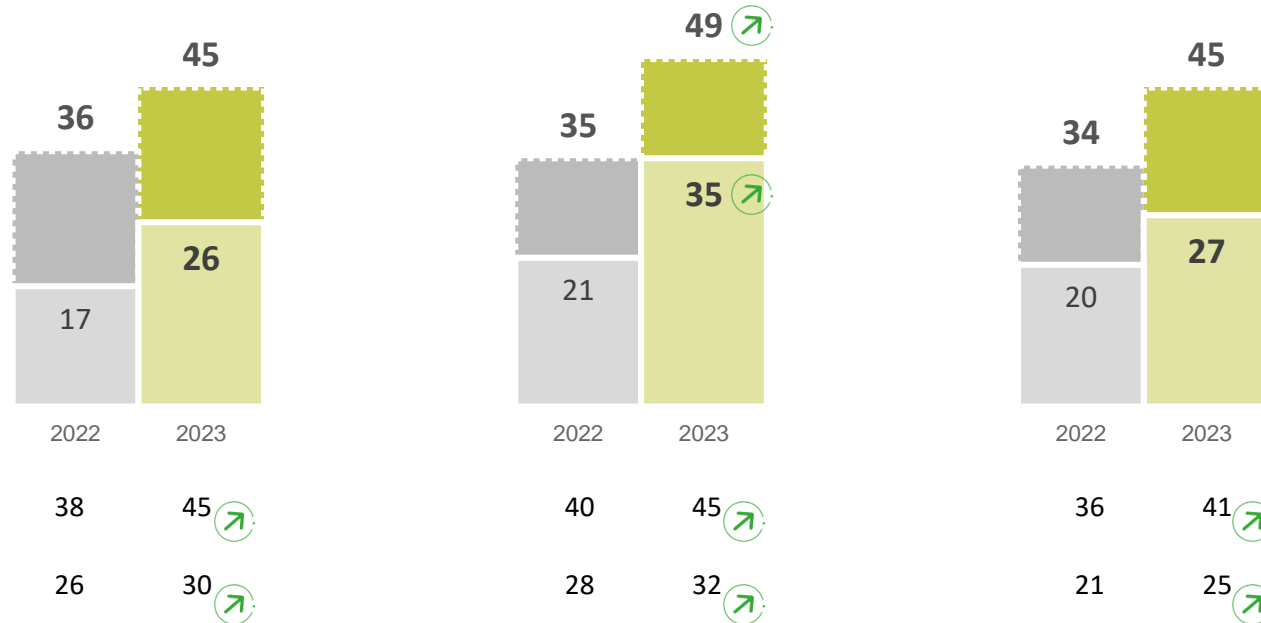
ALREADY  
USING



Plug-in Hybrid

Hybrid

100% Battery  
Electric Vehicle



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 %



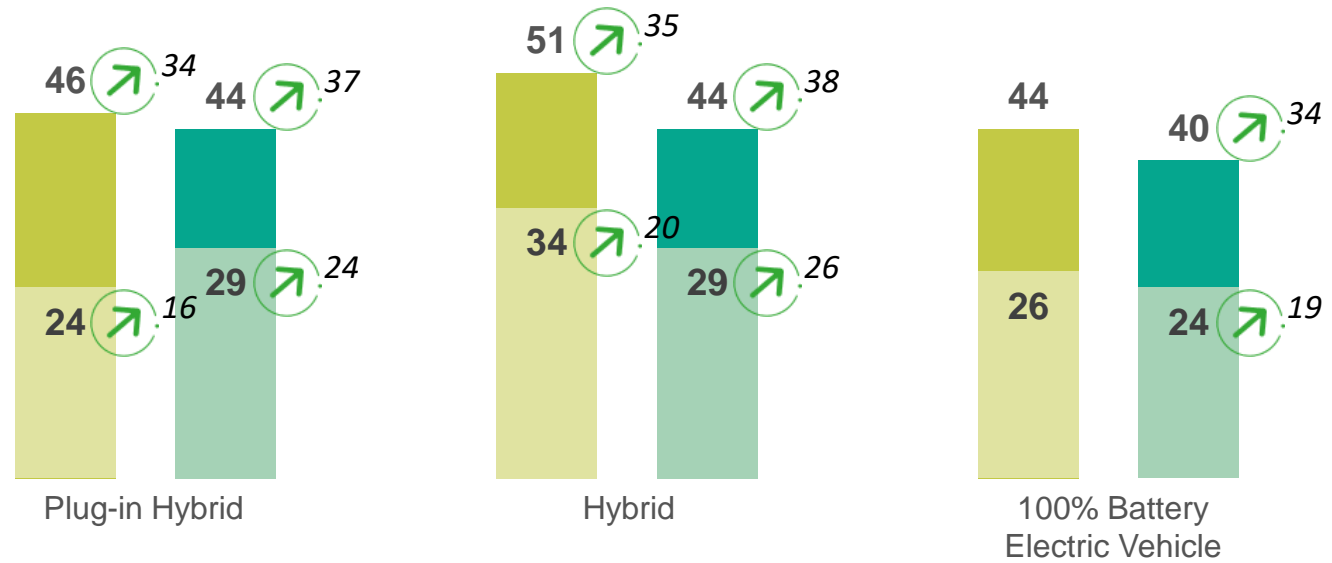
Passenger cars



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING



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**

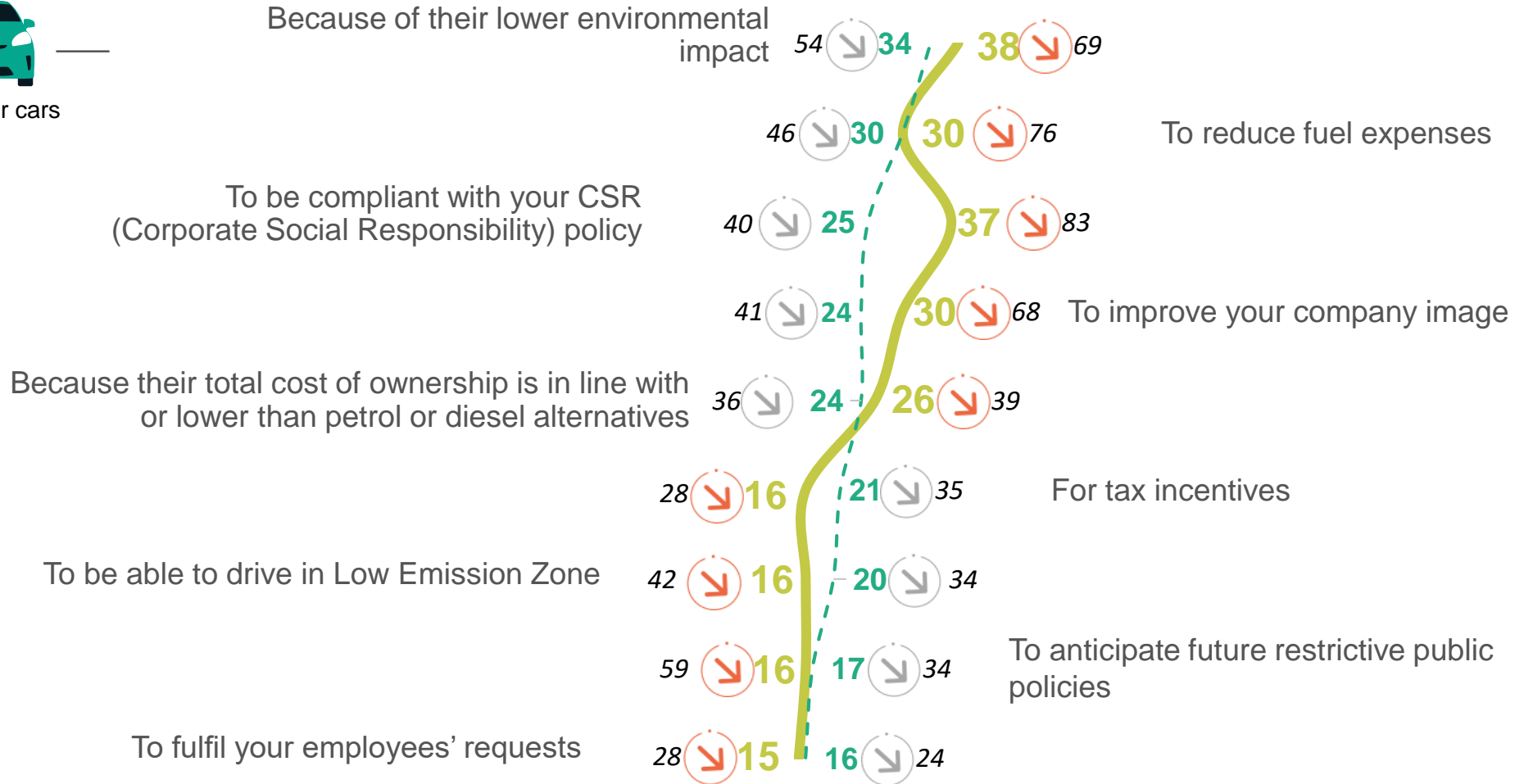
# REASONS FOR IMPLEMENTING OR CONSIDERING ALTERNATIVE FUEL TECHNOLOGIES

## Passenger car fleet

In %



Passenger cars



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

# CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

(At least one technology among 100% BEV and Hydrogen Fuel cell)

In %



LCVs

## HOW TO READ THE RESULTS ?

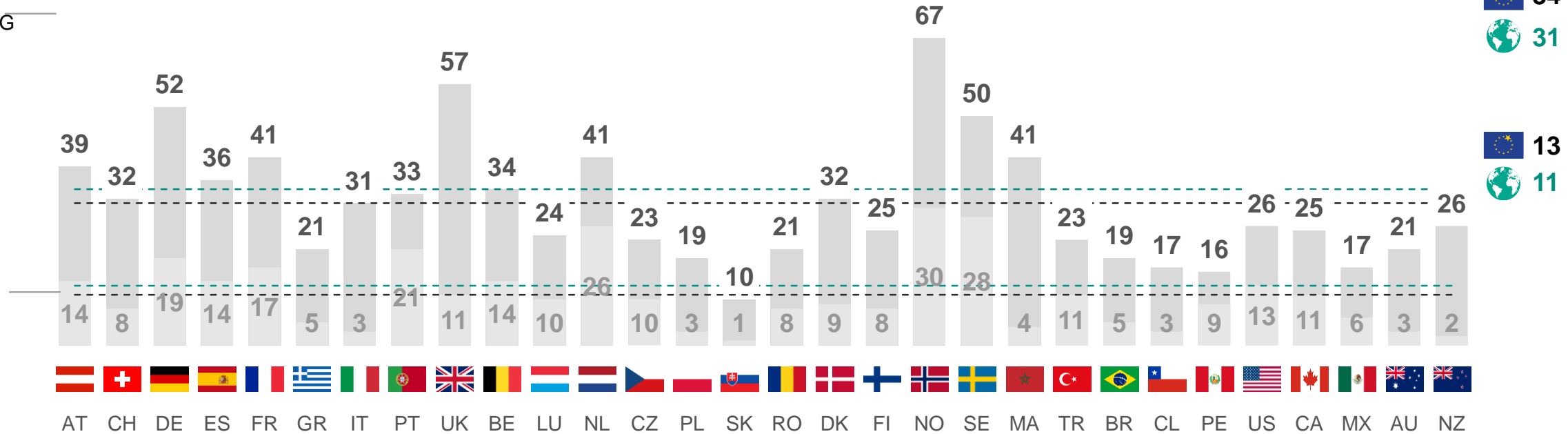
In Switzerland, 32% of the companies are already using or consider to implement at least one alternative technology in the next 3 years. 8% of the companies is currently using at least one.



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING



EU 34  
Globe 31

EU 13  
Globe 11

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

# CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

(At least one technology among 100% BEV and Hydrogen Fuel cell)

In %



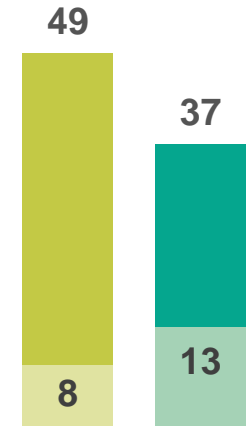
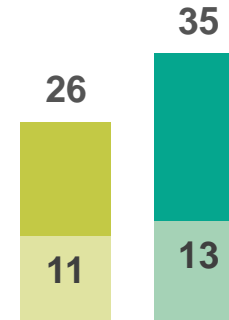
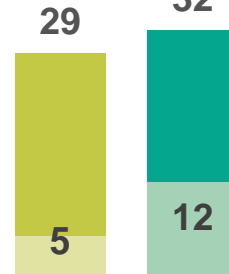
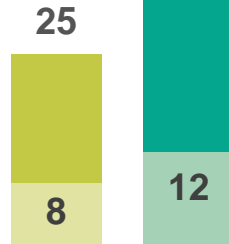
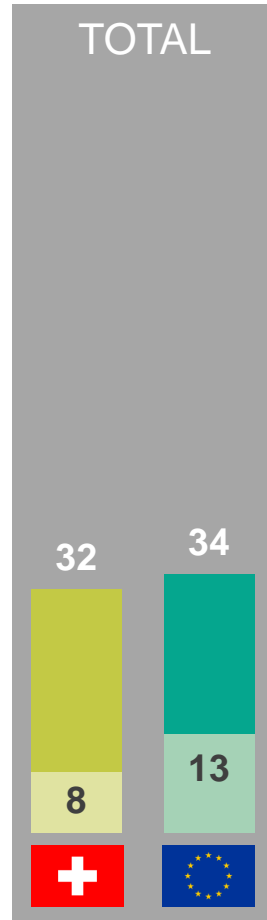
LCVs



ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS



ALREADY USING





# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years

In %



LCVs

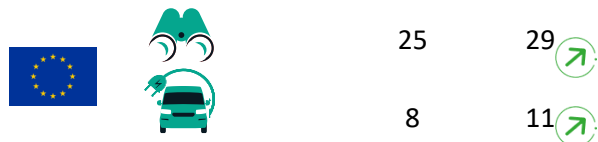
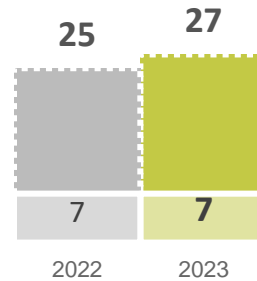
100% Battery  
Electric Vehicle



ALREADY USING OR  
CONSIDER USING IN  
THE NEXT 3 YEARS



ALREADY  
USING



# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years – Less than 10 empl.

In %



LCVs

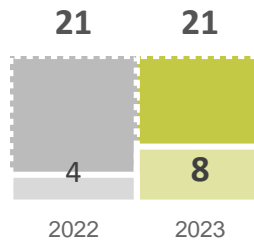
100% Battery  
Electric Vehicle



ALREADY USING OR  
CONSIDER USING IN  
THE NEXT 3 YEARS



ALREADY  
USING



ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS	24	28 ↗
ALREADY USING	7	11 ↗

# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years – 10 - 99 empl.

In %



LCVs

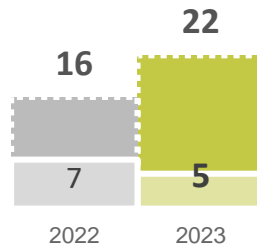
100% Battery  
Electric Vehicle



ALREADY USING OR  
CONSIDER USING IN  
THE NEXT 3 YEARS



ALREADY  
USING



2022 2023



23 27

7 10 ↗

# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years – 100 - 499 empl.

In %



LCVs

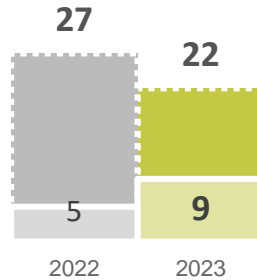
100% Battery  
Electric Vehicle



ALREADY USING OR  
CONSIDER USING IN  
THE NEXT 3 YEARS



ALREADY  
USING



26 30  
9 12 ↗

# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years – 500 empl. or more

In %



LCVs

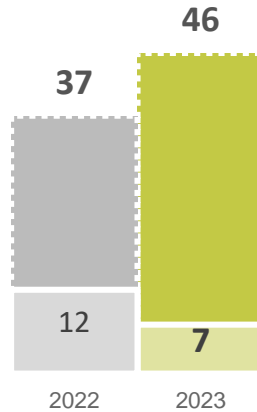


ALREADY USING OR  
CONSIDER USING IN  
THE NEXT 3 YEARS



ALREADY  
USING

100% Battery  
Electric Vehicle



26	32	↗
10	12	

# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years – Focus on 1 to 99

In %

100% Battery  
Electric Vehicle



LCVs



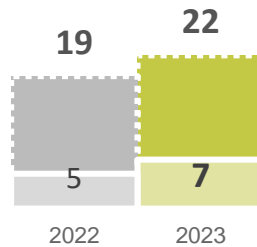
ALREADY USING OR  
CONSIDER USING IN  
THE NEXT 3 YEARS



+



ALREADY  
USING



23

27 ↗



7

11 ↗

# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years – Focus on 100 and more

In %



LCVs



+



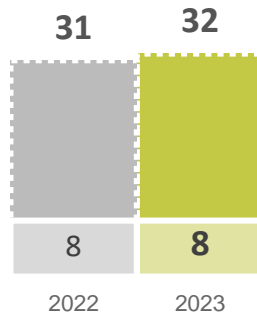
100% Battery  
Electric Vehicle



ALREADY USING OR  
CONSIDER USING IN  
THE NEXT 3 YEARS



ALREADY  
USING



26	31
9	12

# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY\*

## LCV Fleet

In %



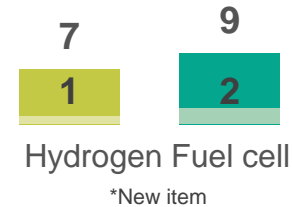
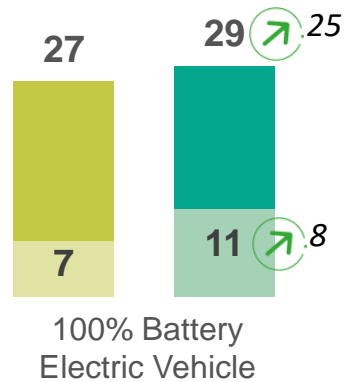
LCVs



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
IMPLEMENTED



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

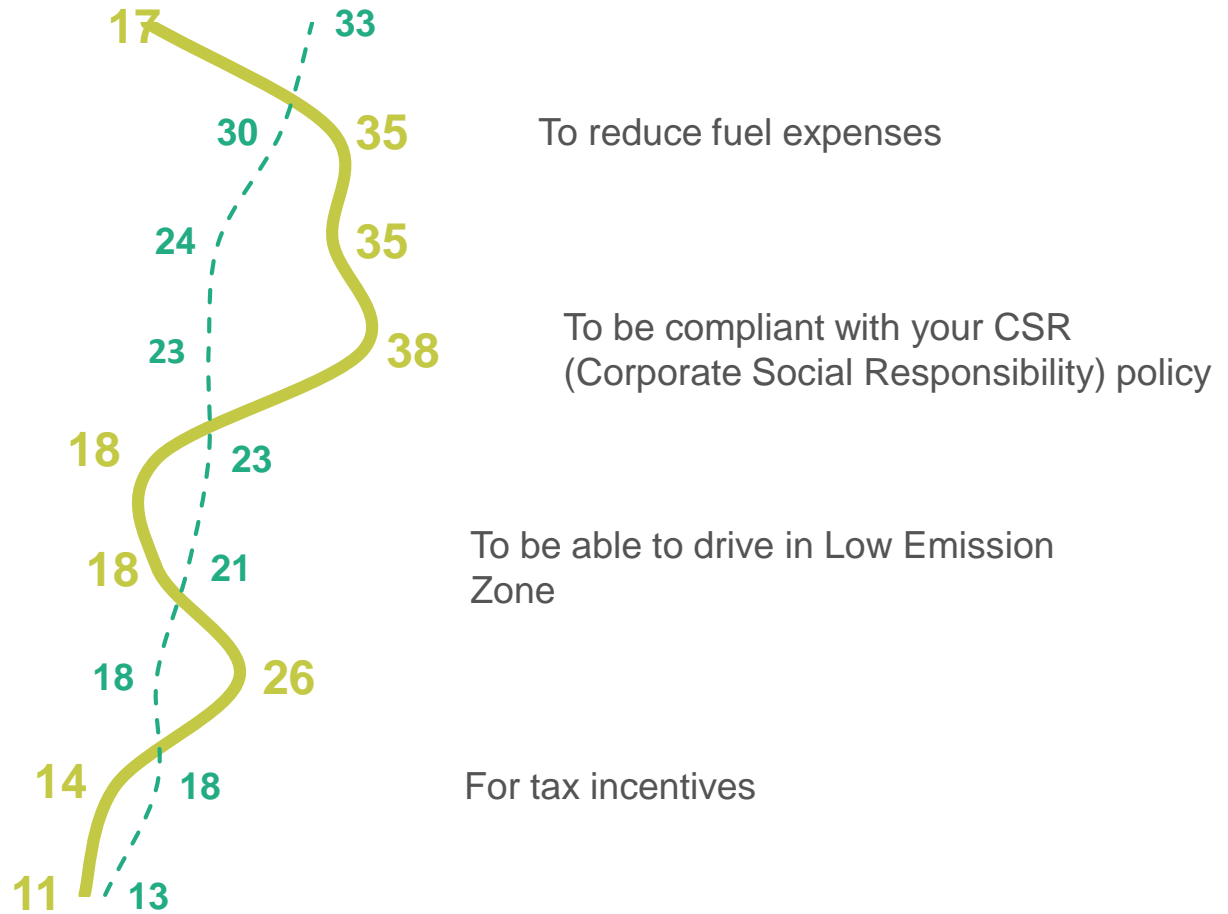
Because of their lower environmental impact

To improve your company image

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

To anticipate future restrictive public policies

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 100% Battery Electric Vehicle for LCVs

# EXPECTED FLEET SHARE PER ENERGY

## HOW TO READ THE RESULTS

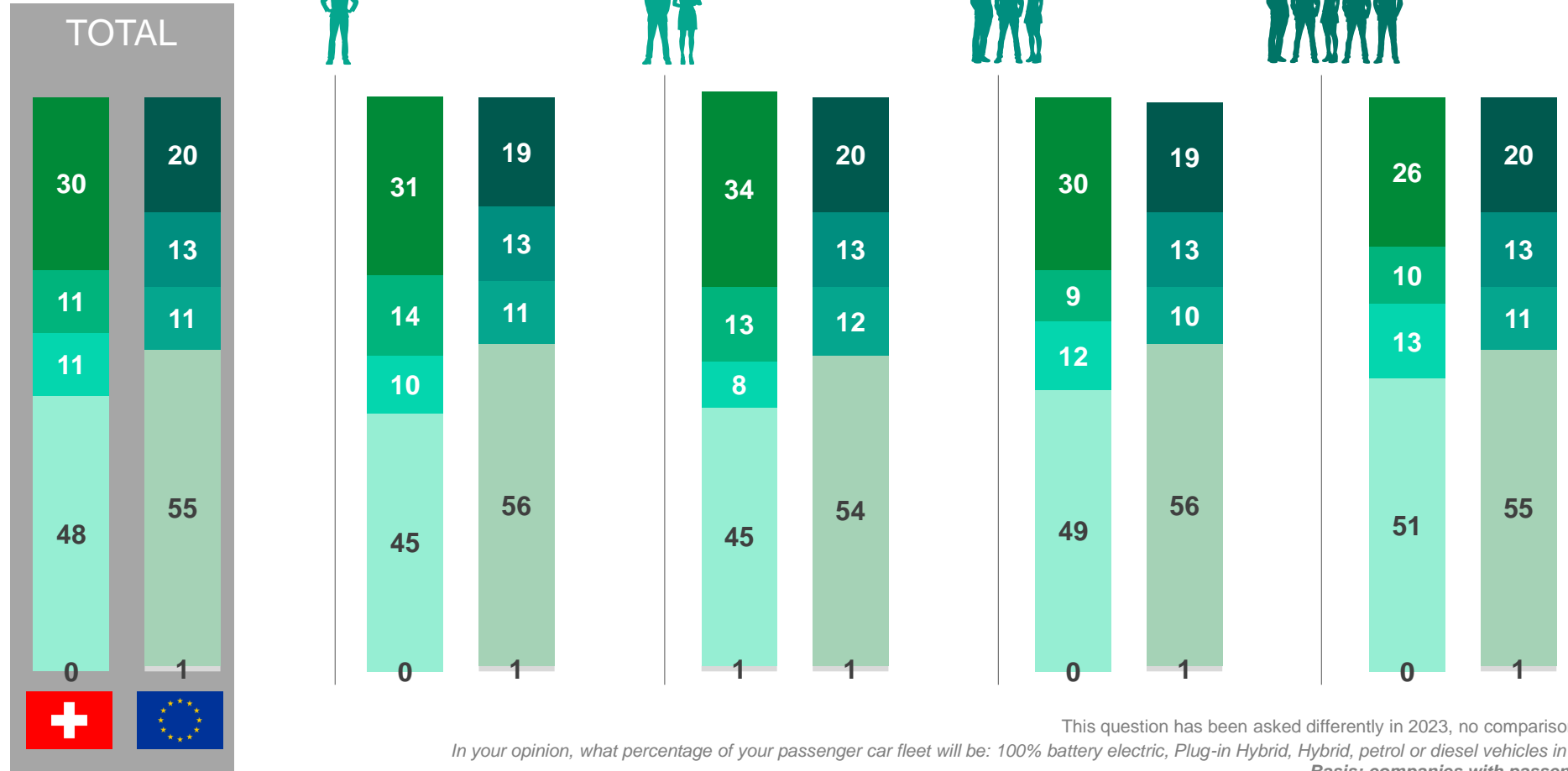
In Switzerland in 3 years, 30% of the companies passenger car fleet will be 100% BEV.

In %



Passenger cars

- 100% battery electric
- Plug-in Hybrid
- Hybrid
- Petrol or Diesel
- Other



This question has been asked differently in 2023, no comparison vs 2022

In your opinion, what percentage of your passenger car fleet will be: 100% battery electric, Plug-in Hybrid, Hybrid, petrol or diesel vehicles in 3 years?  
Basis: companies with passenger cars

# EXPECTED FLEET SHARE PER ENERGY

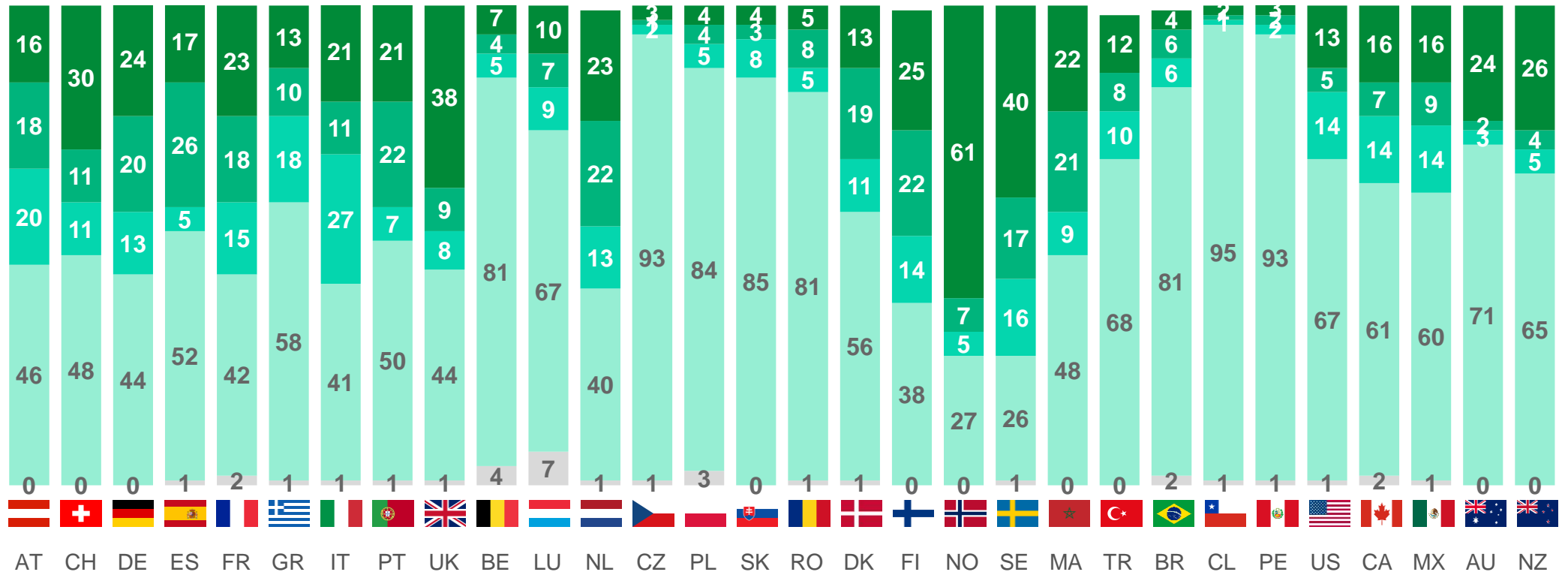
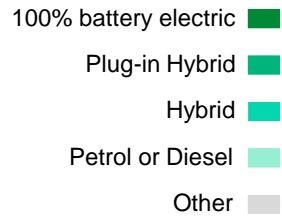
## HOW TO READ THE RESULTS ?

In Switzerland in 3 years, 30% of the companies passenger car fleet will be 100% BEV.

In %



Passenger cars



This question has been asked differently in 2023, no comparison vs 2022

In your opinion, what percentage of your passenger car fleet will be: 100% battery electric, Plug-in Hybrid, Hybrid, petrol or diesel vehicles in 3 years?

Basis: companies with passenger cars

# EXPECTED FLEET SHARE PER ENERGY

In %

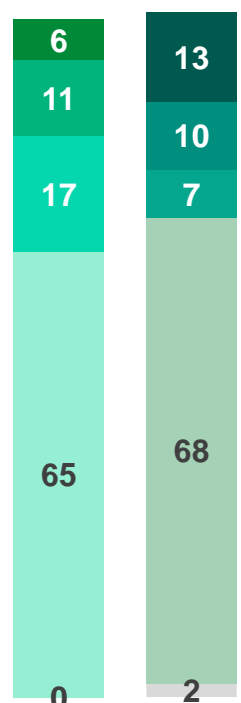
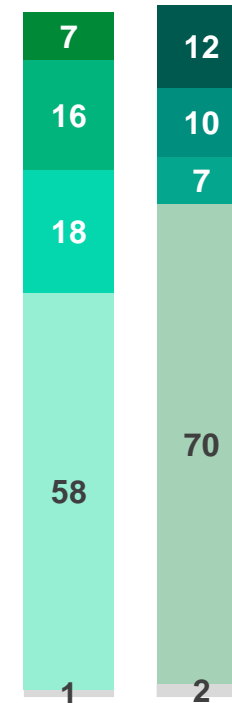
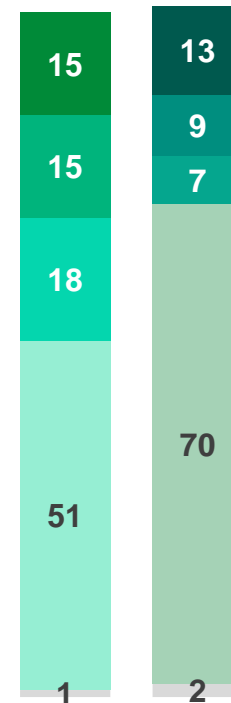
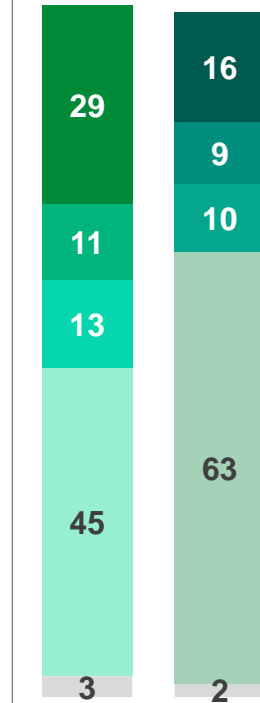
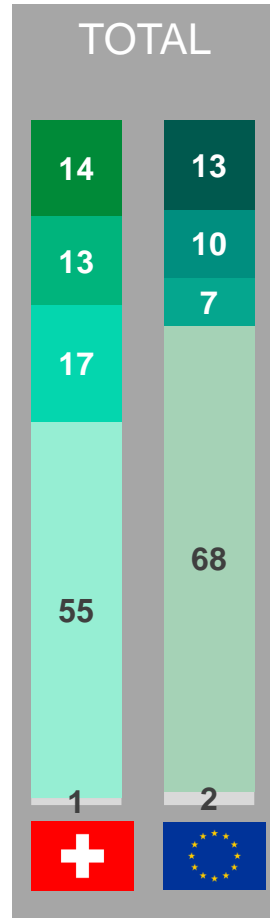


LCVs

## HOW TO READ THE RESULTS ?

In Switzerland in 3 years, 14% of the light commercial vehicle fleet will be 100% BEV.

- 100% battery electric
- Plug-in Hybrid
- Hybrid
- Petrol or Diesel
- Other



This question has been asked differently in 2023, no comparison vs 2022

In your opinion, what percentage of your light commercial vehicle fleet will be: 100% battery electric, Plug-in Hybrid, Hybrid, petrol or diesel vehicles in 3 years?  
Basis: companies with LCVs

# EXPECTED FLEET SHARE PER ENERGY

## HOW TO READ THE RESULTS ?

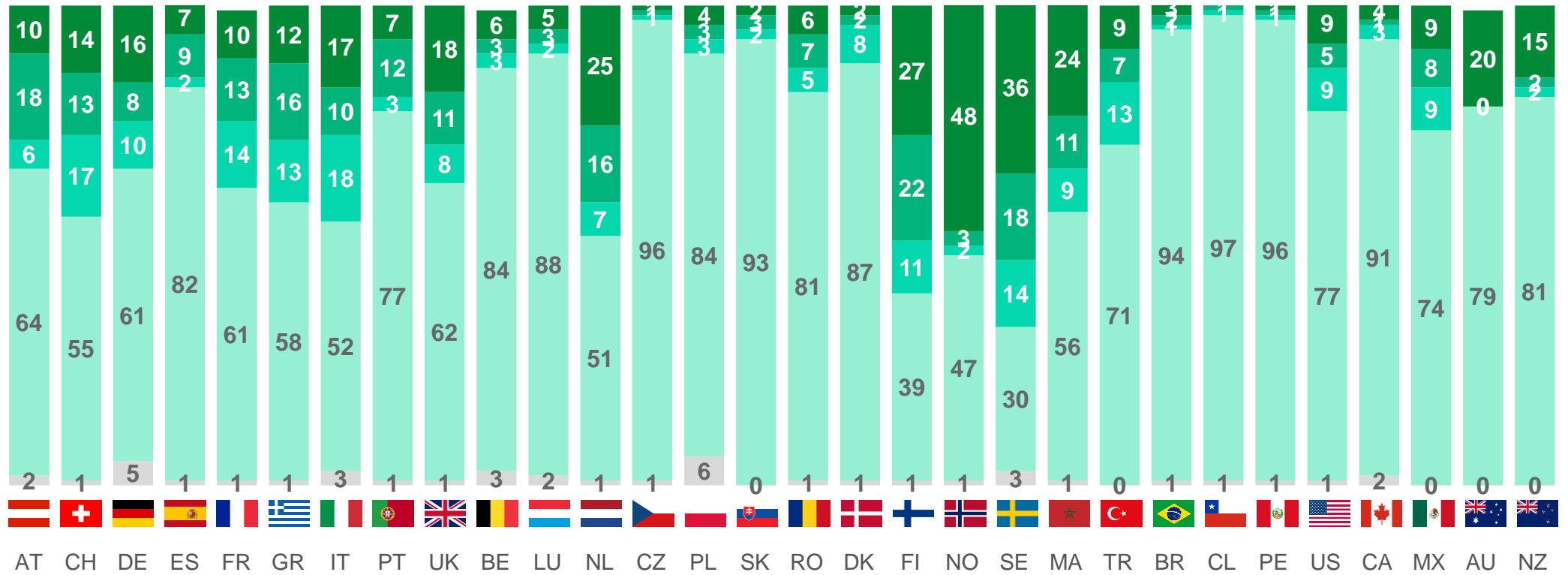
In Switzerland in 3 years, 14% of the light commercial vehicle fleet will be 100% BEV.

In %



LCVs

- 100% battery electric
- Plug-in Hybrid
- Hybrid
- Petrol or Diesel
- Other



This question has been asked differently in 2023, no comparison vs 2022

In your opinion, what percentage of your light commercial vehicle fleet will be: 100% battery electric, Plug-in Hybrid, Hybrid, petrol or diesel vehicles in 3 years?

Basis: companies with LCVs

5

# ENERGY MIX FOCUS PER ALTERNATIVE TECHNOLOGY



# HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %



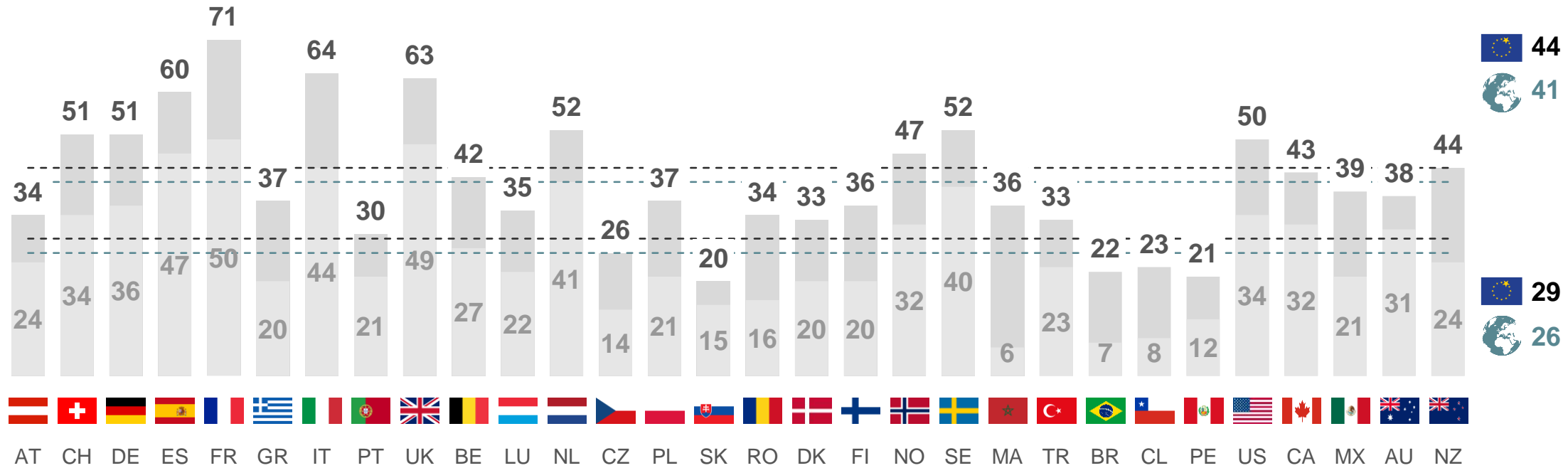
Passenger cars



ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS



ALREADY USING



EU 44

World 41


EU 29

World 26

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**

# HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %

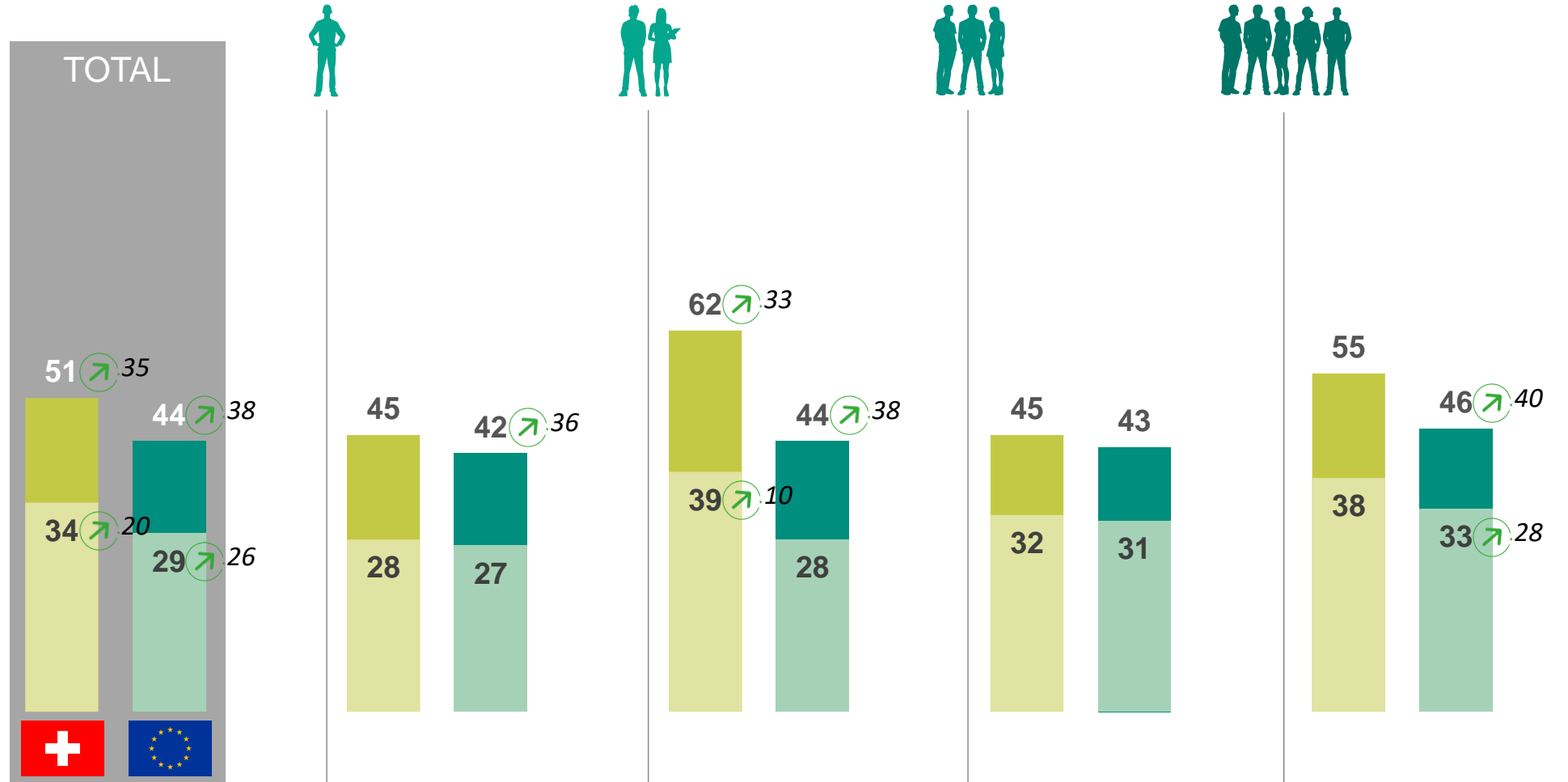
  
Passenger cars



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING



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 %



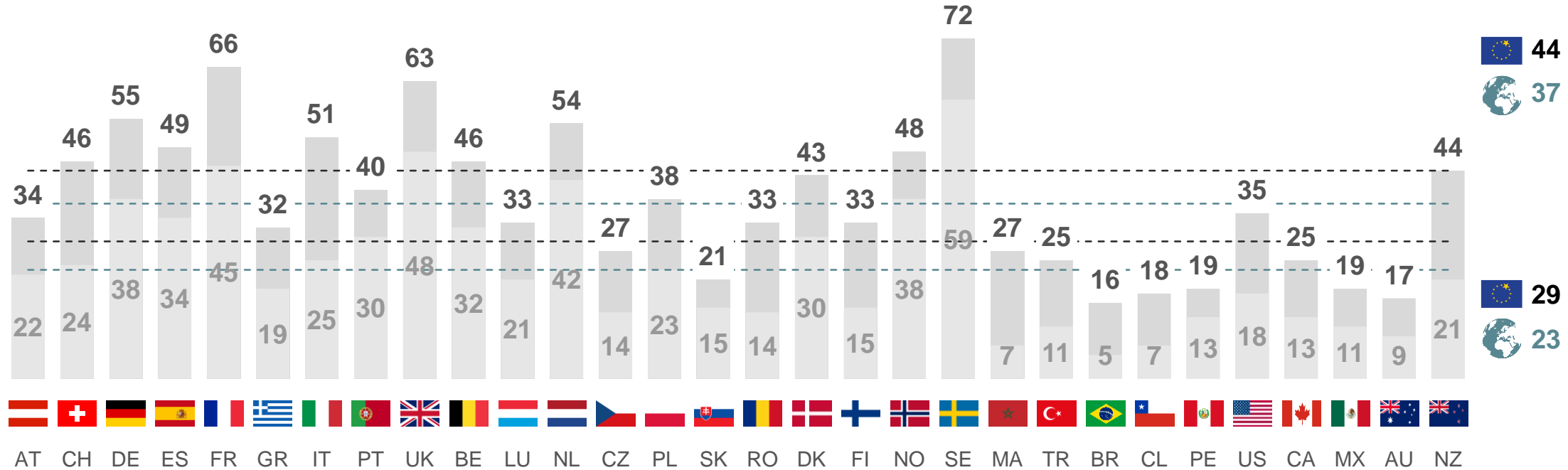
Passenger cars



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



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 %



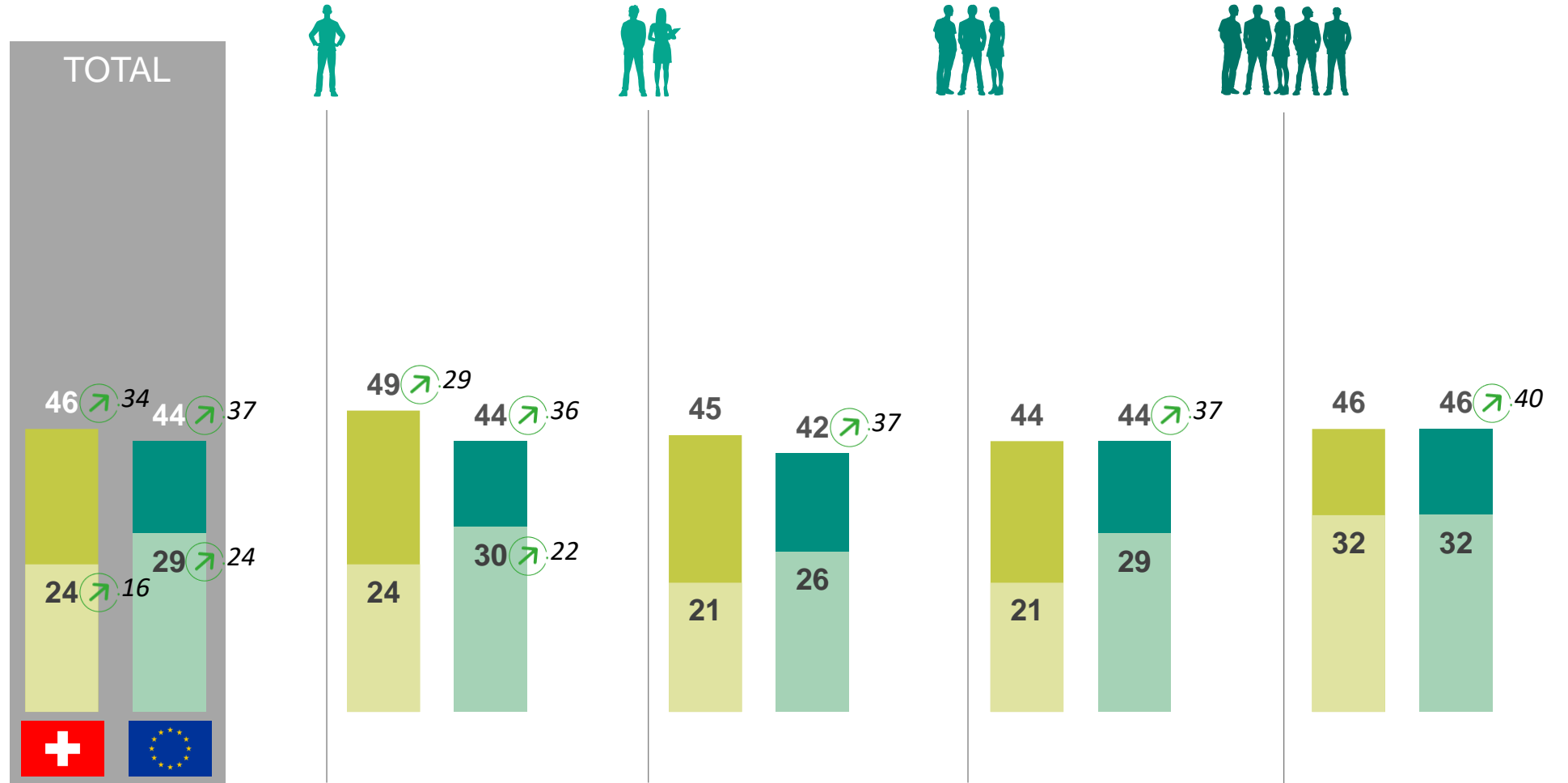
Passenger cars



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING



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 %



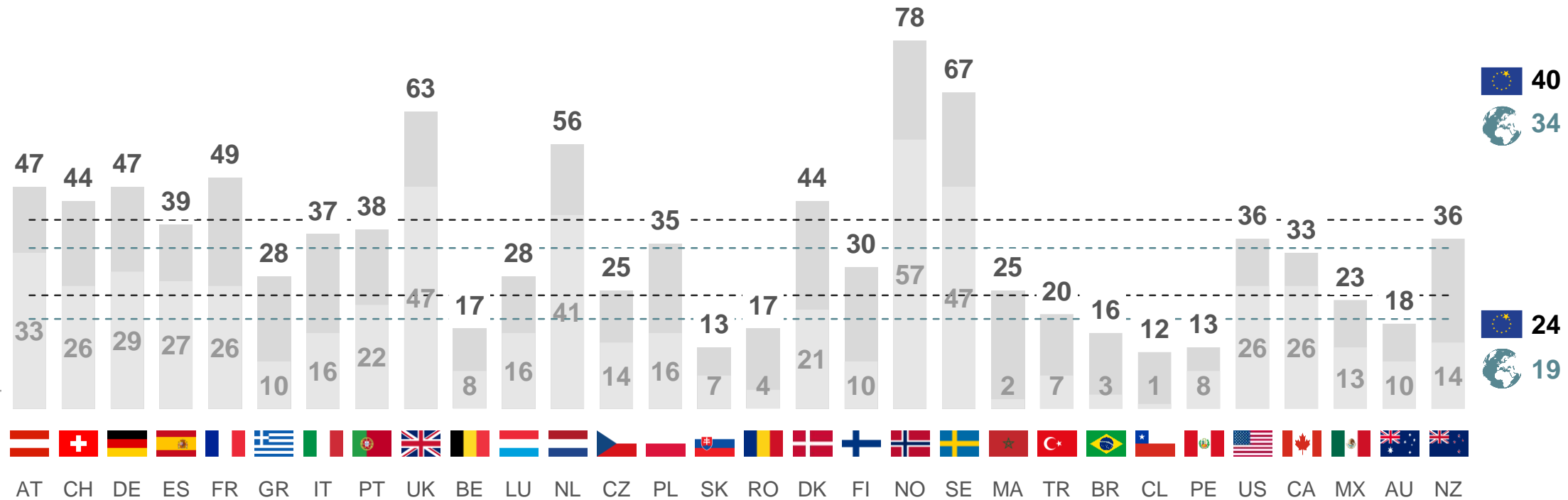
Passenger cars



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



EU 40

World 34

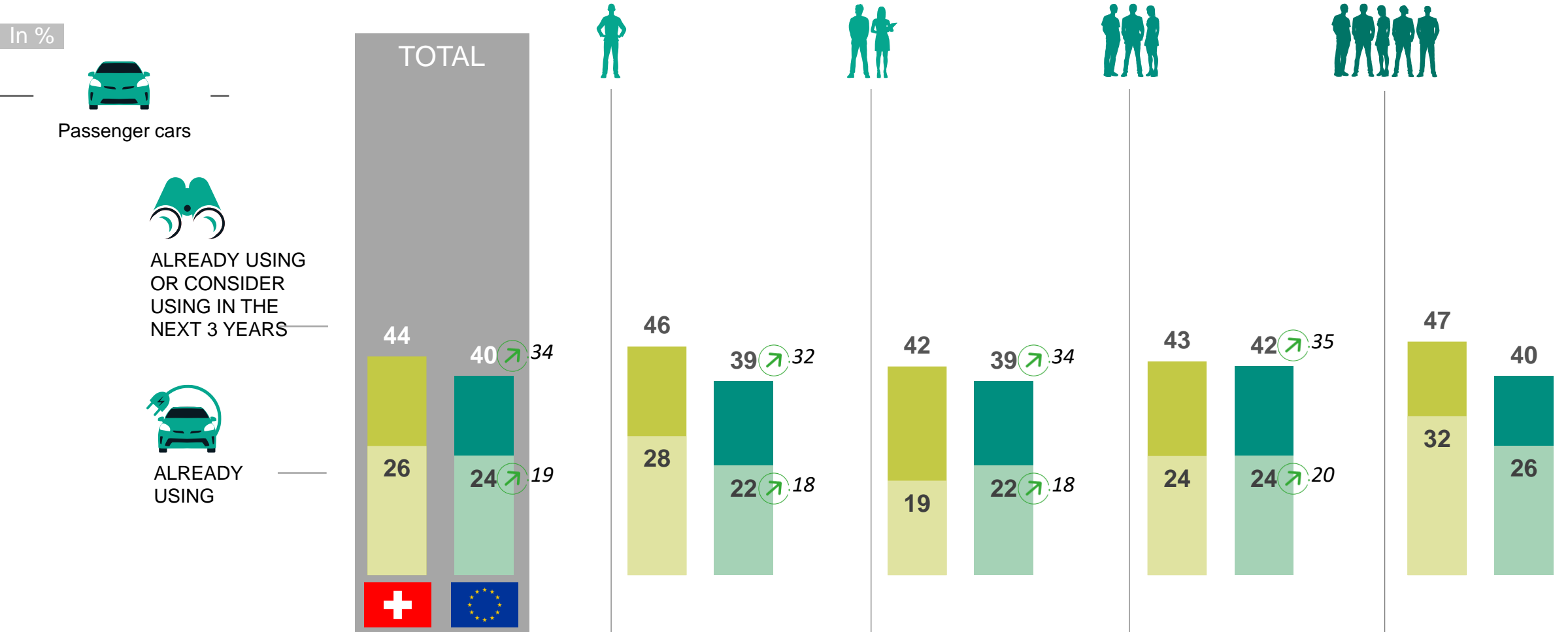
EU 24

World 19

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



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 %



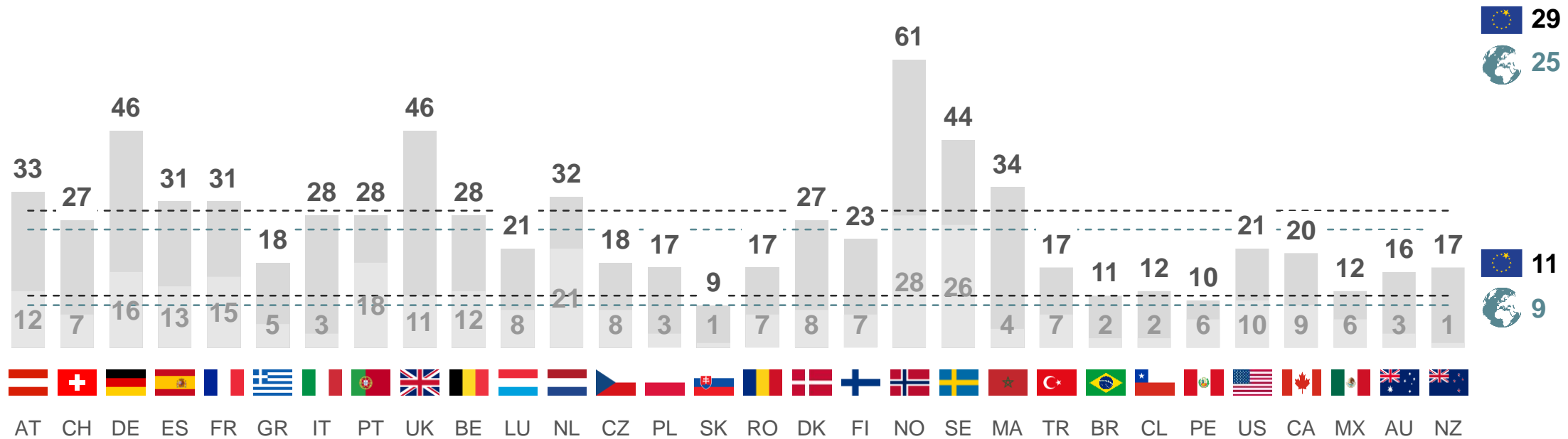
LCVs



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



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

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

In %



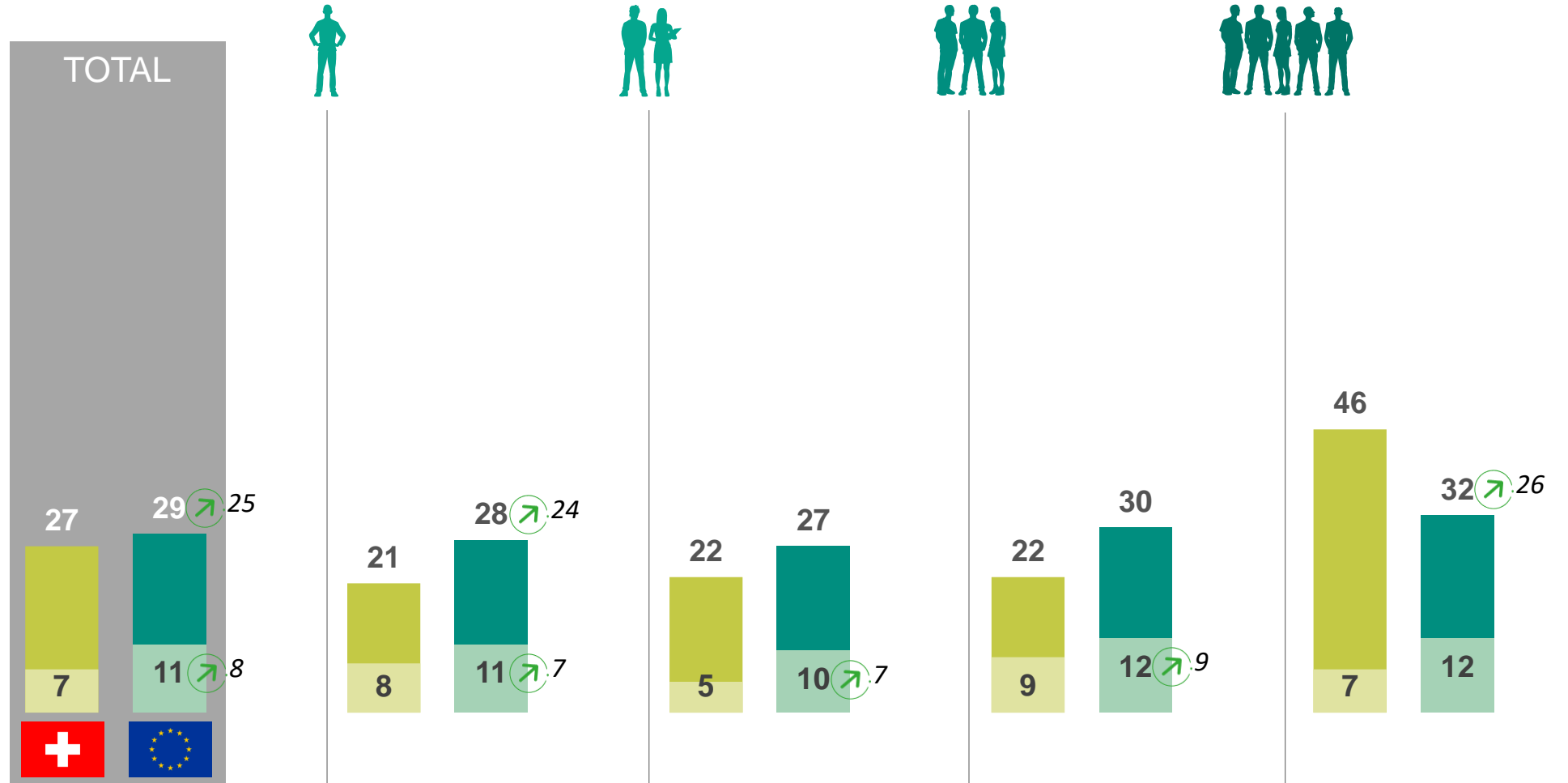
LCVs



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING



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**

# HYDROGEN FUEL CELL ELECTRIC VEHICLE : IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %



LCVs



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS

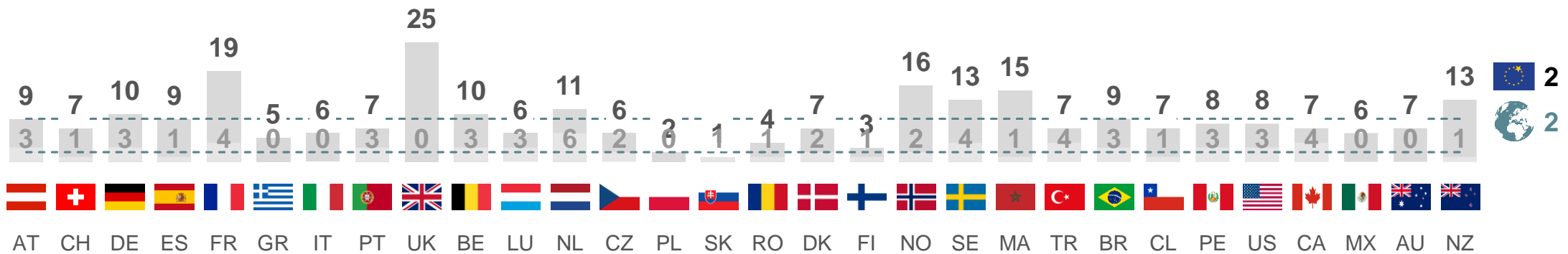
9



9



ALREADY  
USING



2



2

New item added in 2023

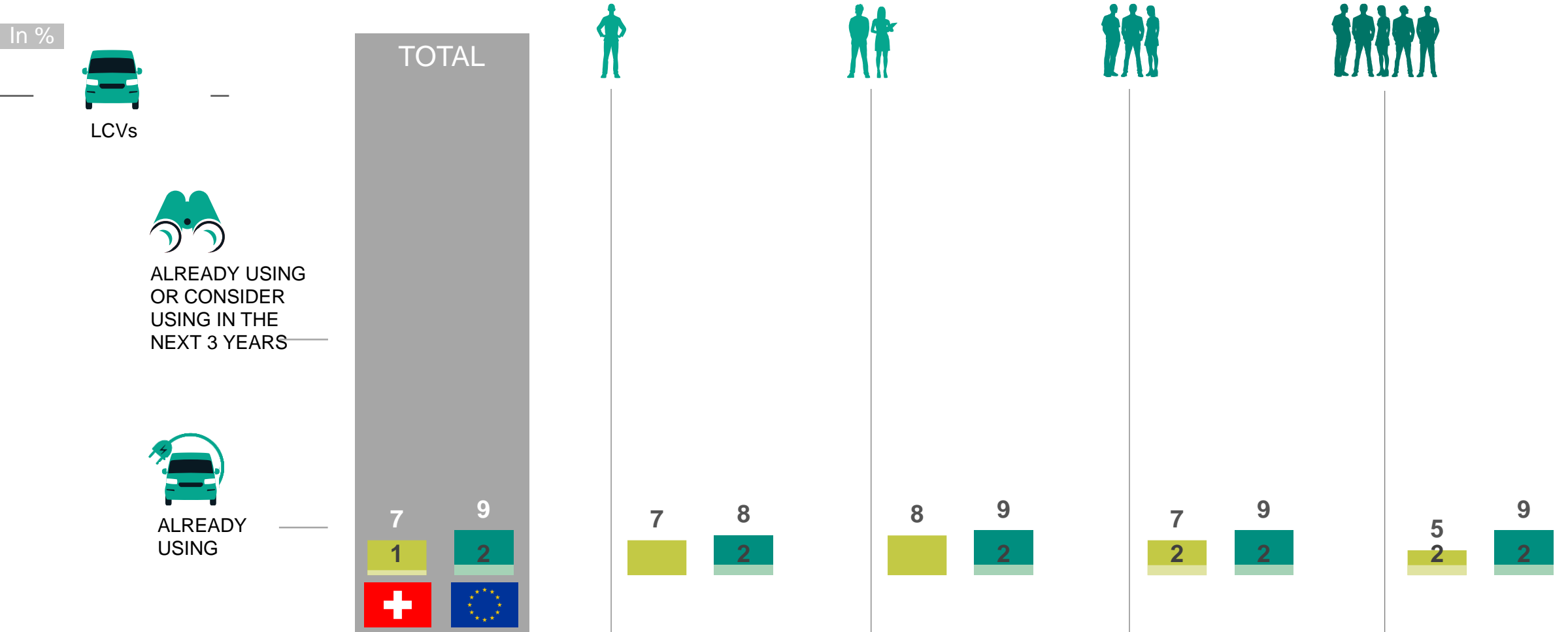
Amongst the following alternative fuel technologies, which ones do you currently use...?

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

Basis: companies with LCVs

99

# HYDROGEN FUEL CELL ELECTRIC VEHICLE : IMPLEMENTATION WITHIN COMPANY FLEET POLICY



New item added in 2023

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

do not consider implementing battery electric vehicles

51

The purchase price is higher than a regular fuel car



Not enough public charging points



No charging points at your company offices



No charging solutions at your employees' home



The range of models is limited for this type of vehicles



The questions raised on their reliability



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

TOTAL

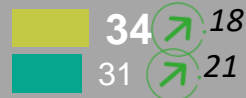
Currently no charging points installed at the company premises



Drivers have to pay for home installation of charging points



Charging points are planned to be installed at the company premises in the next 12 months



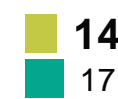
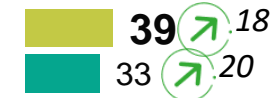
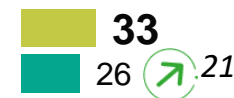
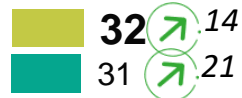
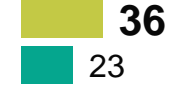
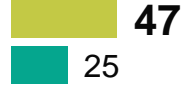
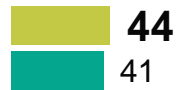
Company subsidises cost of home installations of charging points for drivers



Charging points installed at the company premises and free charging for drivers



Charging points installed at the company premises and drivers charged for charging



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 BEV/PHEV for passenger cars or BEV for LCV

# CHARGING POINT ACCESS MANAGEMENT

73%

Of companies are using or consider using in the next three years BEV or PHEV in their fleet of passenger cars or BEV in their fleet of LCVs

In %



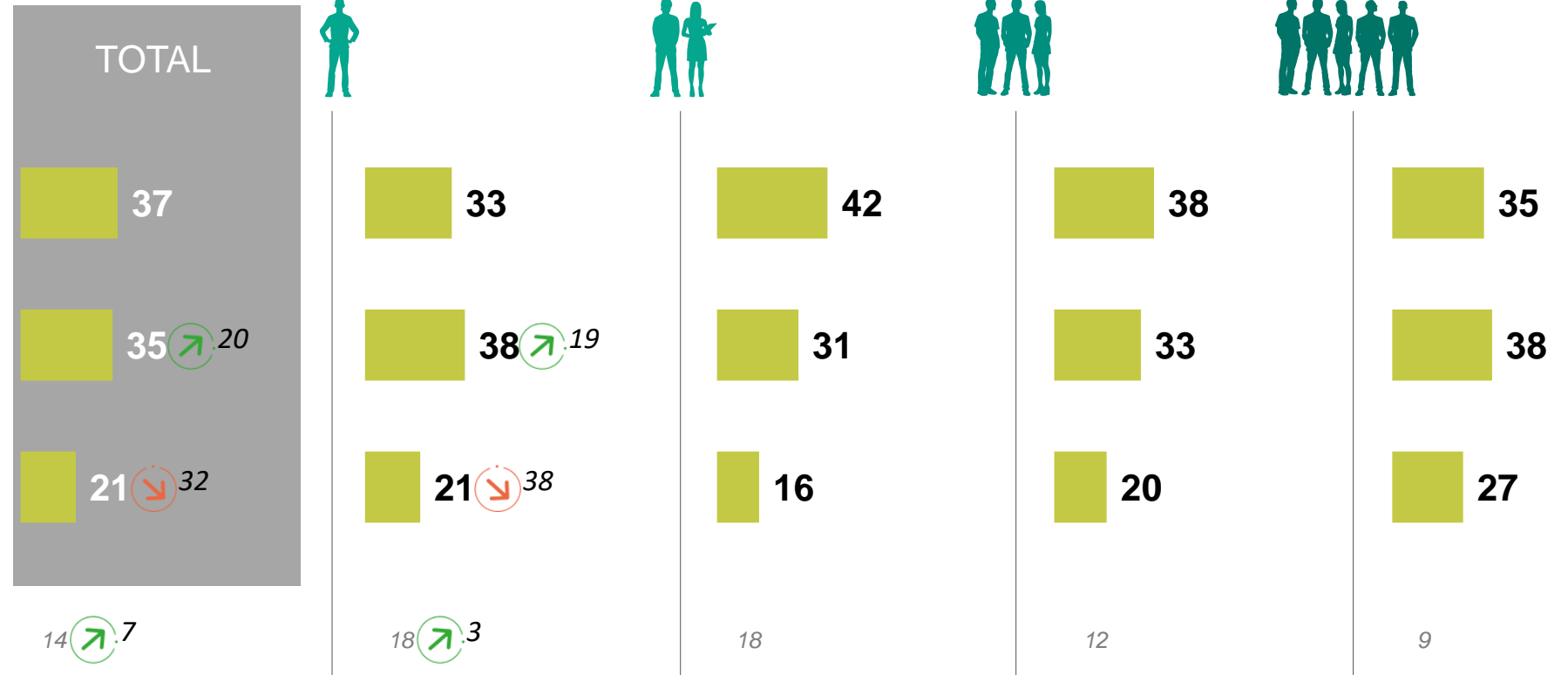
Passenger cars + LCVs

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

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

We use public charging points

Don't know



How do you manage the charging point solutions in your company?  
 Basis: companies already using or considering BEV/PHEV for passenger cars or BEV for LCV  
 Several answers possible: % don't add up to 100%

# DRIVER SUPPORT FOR CHARGING POINT INSTALLATION

73%

Of companies are using or consider using in the next three years BEV or PHEV in their fleet of passenger cars or BEV in their fleet of LCVs

In %



Passenger cars + LCVs

TOTAL

NET Yes

41



45



33



47



36

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

24

32

21

26

14

Yes, you use lump sum payments

17

13

11

21

23

No, this is owed by driver with no finance support

43 ↘ 54

39

51

39

47

Don't know

16 ↗ 3

16 ↗ 1

17

14 ↗ 1

17

Do you support your drivers for charging points installation?  
Basis: companies already using or considering BEV/PHEV for passenger cars or BEV for LCV

6

# WHAT ARE THE PERSPECTIVES IN TERMS OF MOBILITY SOLUTIONS?



# MOBILITY SOLUTIONS



## TOP 3 USED SOLUTIONS



#1

Public transport

24%

21%

#2

Corporate car sharing: where an employee can make a vehicle reservation via an external solution

17%

13%

#3

Car or cash allowance

16%

16%



## TOP 3 POTENTIAL NEXT 3 YEARS



#1

Public transport

34%

30%

#2

Corporate car sharing: where an employee can make a vehicle reservation via an external solution

30%

22%

#3

Car or cash allowance

27%

26%



# A STABLE DEVELOPMENT OF MOBILITY SOLUTIONS, WITH YET SOME POSITIVE PERSPECTIVES

*To note: in 2023, were interviewed only respondents who are aware of mobility solutions, which means almost 82% of overall population (no impact on the representativity of the results). Around one third of the respondents were managing directors.*

*And a new “car or cash allowance” mobility solution was tested, allowing no comparison of mobility solutions implementation vs 2022.*

1

- This year, **the share of companies having adopted at least one mobility solution is on par with the European average.**  
**The intention to implement mobility solutions is increasing** (already using or consider in the next 3 years, 89% vs 75%)  
If the implementation seems quite balanced between mobility solutions, ride sharing and public transport are the most widespread, **smaller companies seem more voluntarist on “innovative” ones:** corporate car sharing, mobility budget, mobility app.

2

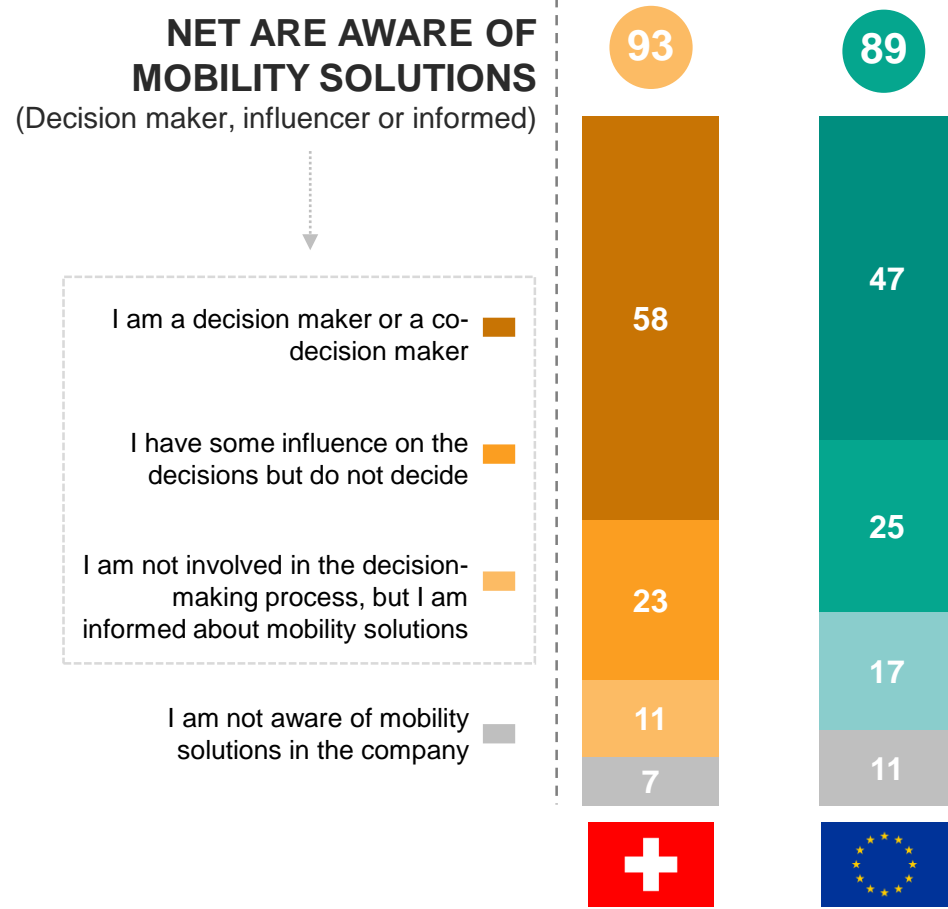
- The development of mobility solutions is **mostly driven by CSR and company attractiveness motivations, but also HR-related needs / employees' requests** and remains considered as an **add-on to the corporate fleet**, few companies considering giving up all or part of their fleet for such alternatives.

3

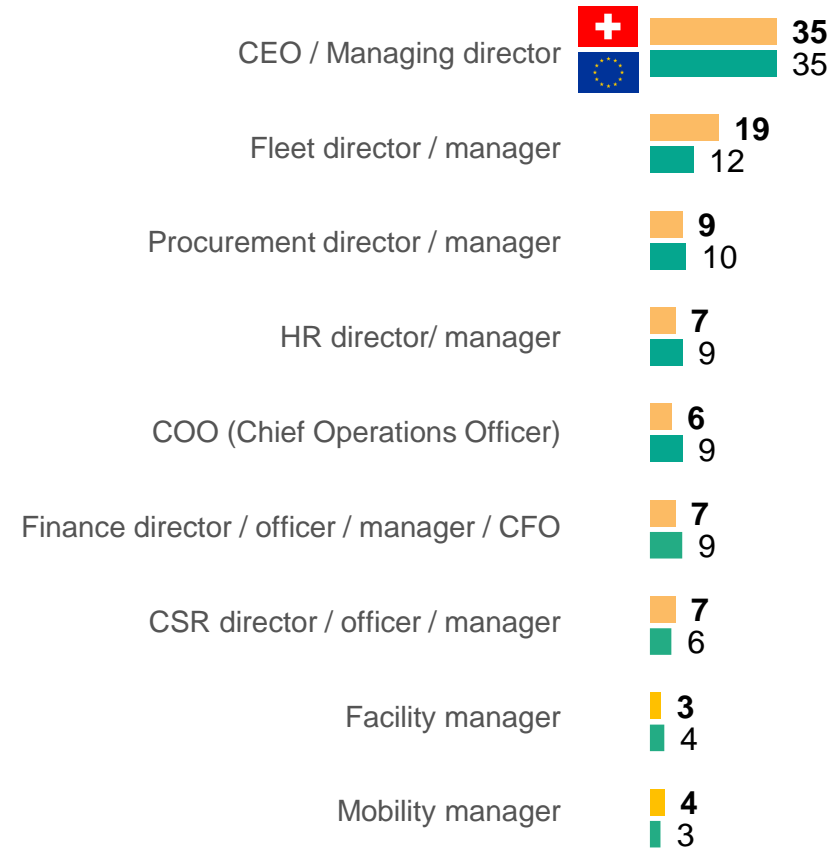
- The allowance of a mobility budget to employees is mostly seen as **an opportunity to offer more flexibility in their employees' mobility and also to lower mobility costs.**

# MOBILITY SOLUTION DECISION MAKERS

## RESPONDENTS INVOLVEMENT IN MOBILITY SOLUTION DECISIONS



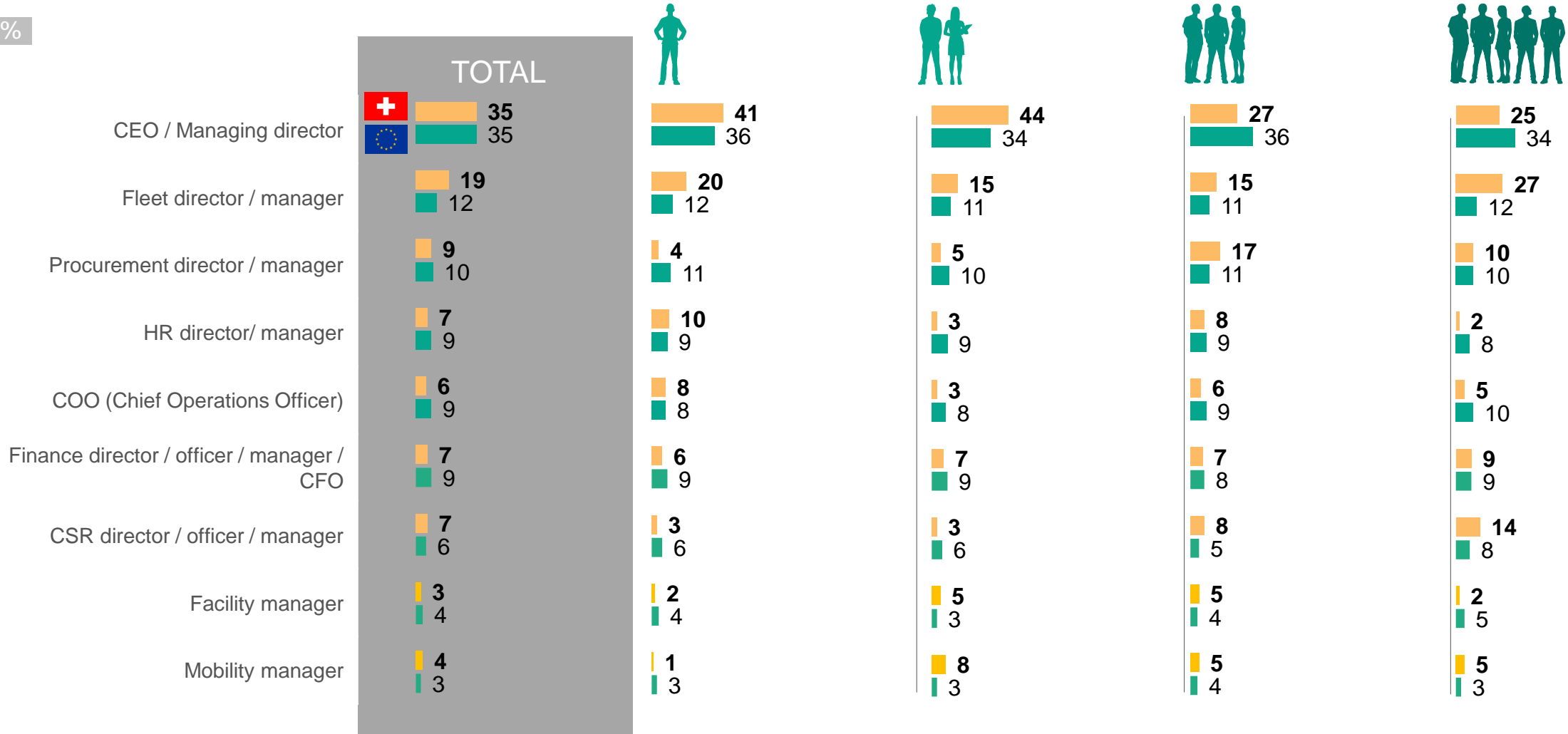
## POSITION OF THE PERSON WHO DECIDES ON MOBILITY SOLUTIONS





# POSITION OF THE PERSON WHO DECIDES ON MOBILITY SOLUTIONS

In %



# MOBILITY SOLUTIONS 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



**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



**CAR OR CASH ALLOWANCE** \*New item

# MOBILITY SOLUTIONS IMPLEMENTATION

At least one already implemented

In %

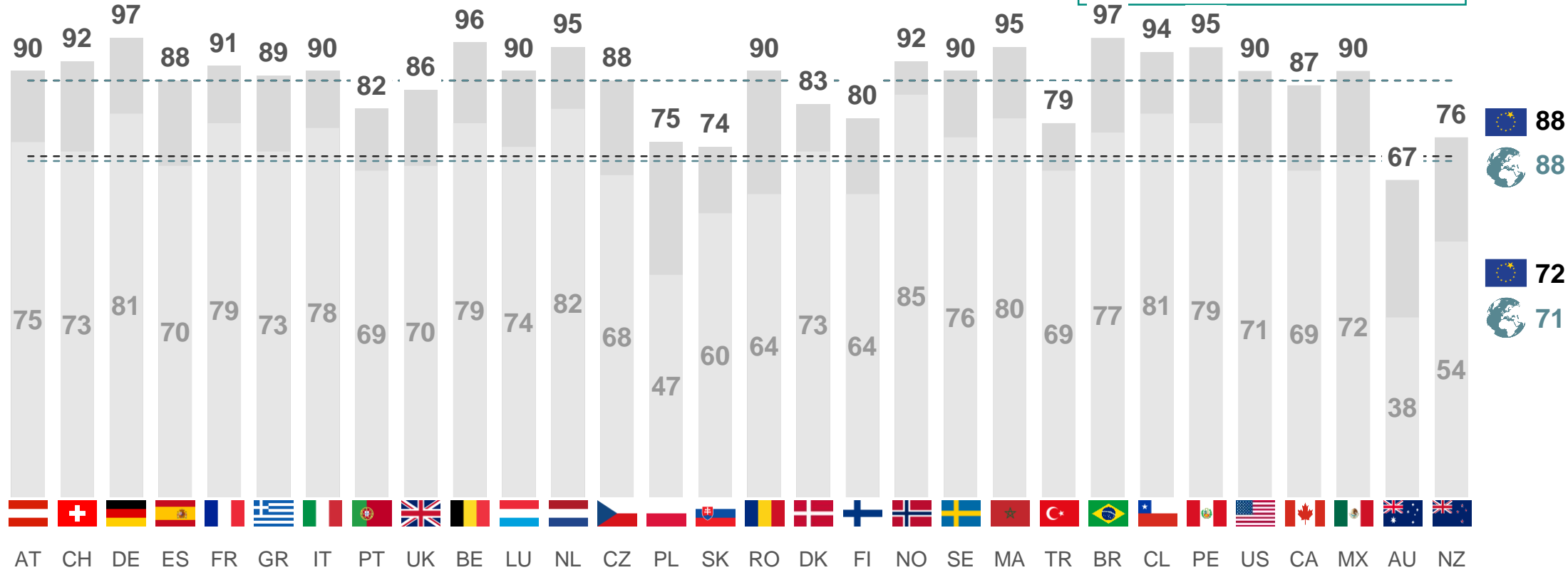


ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS



ALREADY USING

- List of the alternative mobility solutions:
- CORPORATE CAR SHARING
  - RIDE SHARING
  - BIKE SHARING / BIKE LEASING
  - 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
  - CAR OR CASH ALLOWANCE \*New item



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%  
 Question asked to respondents that are aware of mobility solutions

# MOBILITY SOLUTIONS IMPLEMENTATION

At least one already implemented (including car or cash allowance)

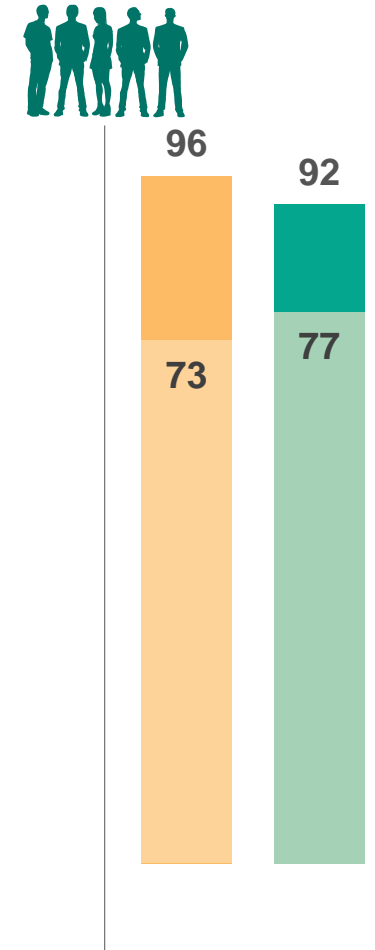
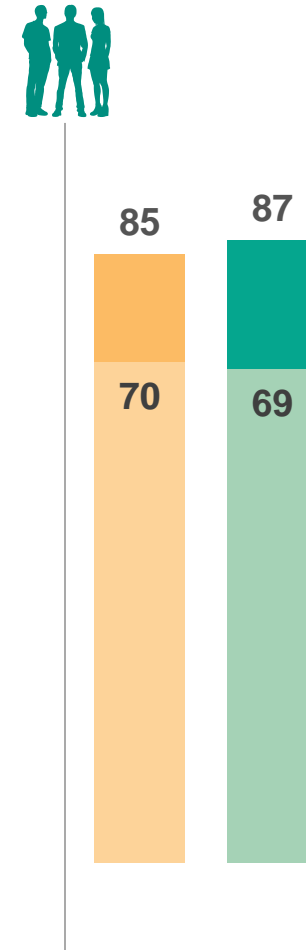
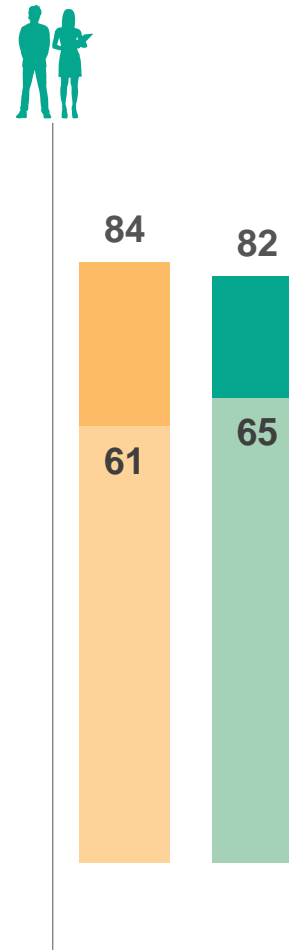
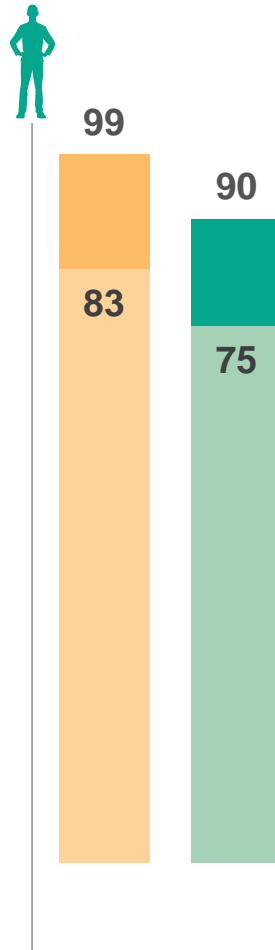
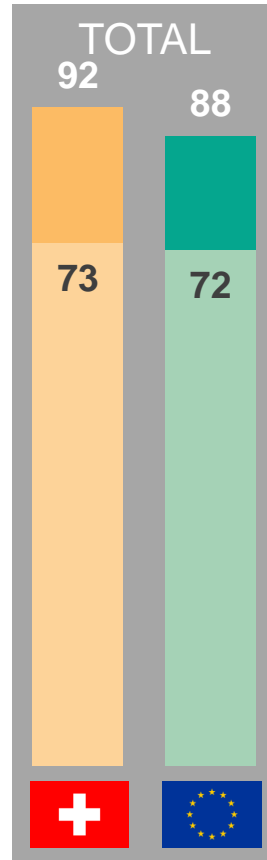
In %



ALREADY USING  
OR CONSIDER IN  
THE 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%

Question asked to respondents that are aware of mobility solutions

# OVERVIEW OF MOBILITY SOLUTIONS IMPLEMENTATION

In %

**73%**

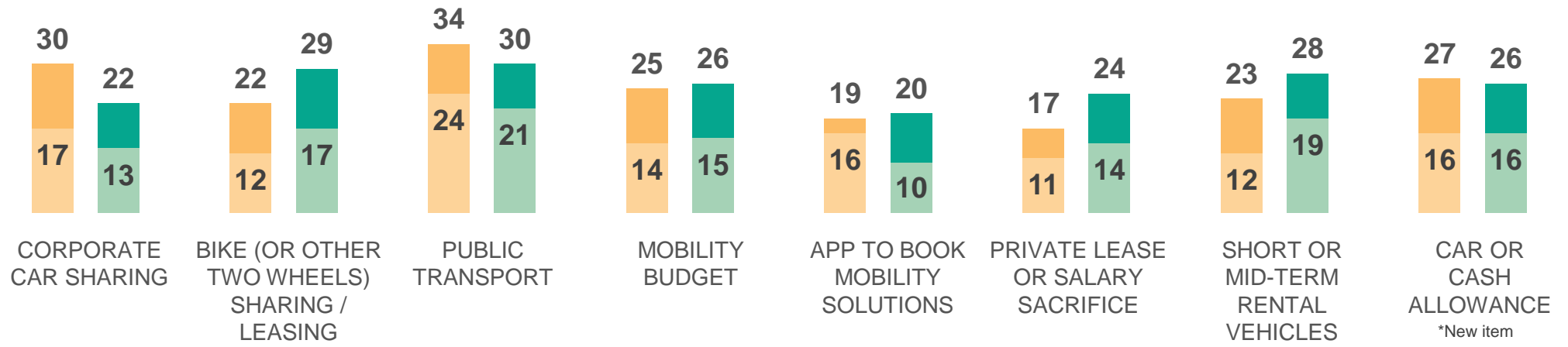
Of companies have already implemented at least one of these solutions



ALREADY USING OR CONSIDER IN THE 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%

Question asked to respondents that are aware of mobility solutions

# OVERVIEW OF MOBILITY SOLUTIONS IMPLEMENTATION

Focus on 1 to 99

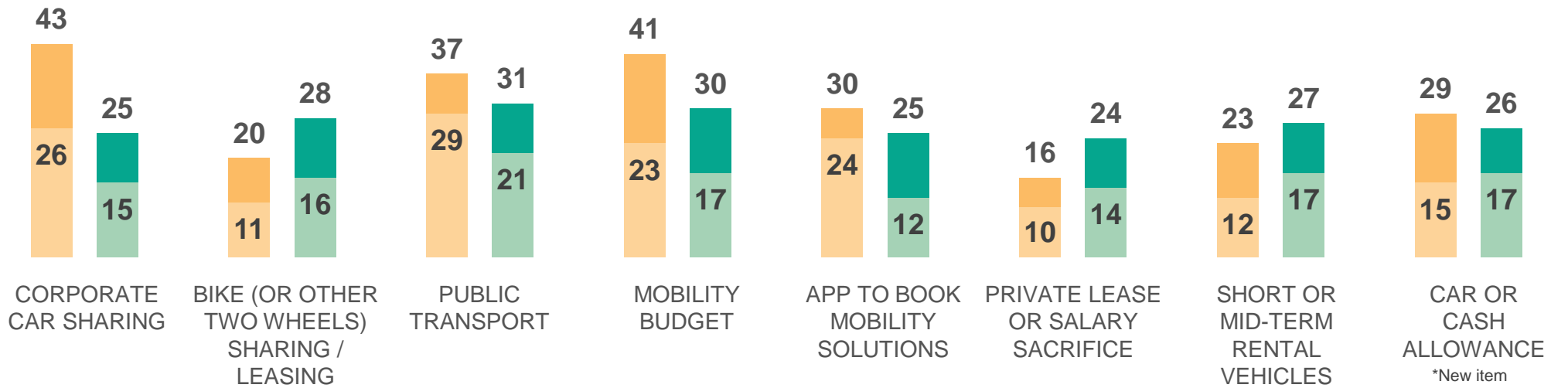
**75%**

Of companies have already implemented at least one of these solutions



ALREADY USING OR CONSIDER IN THE 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%

Question asked to respondents that are aware of mobility solutions

# OVERVIEW OF MOBILITY SOLUTIONS IMPLEMENTATION

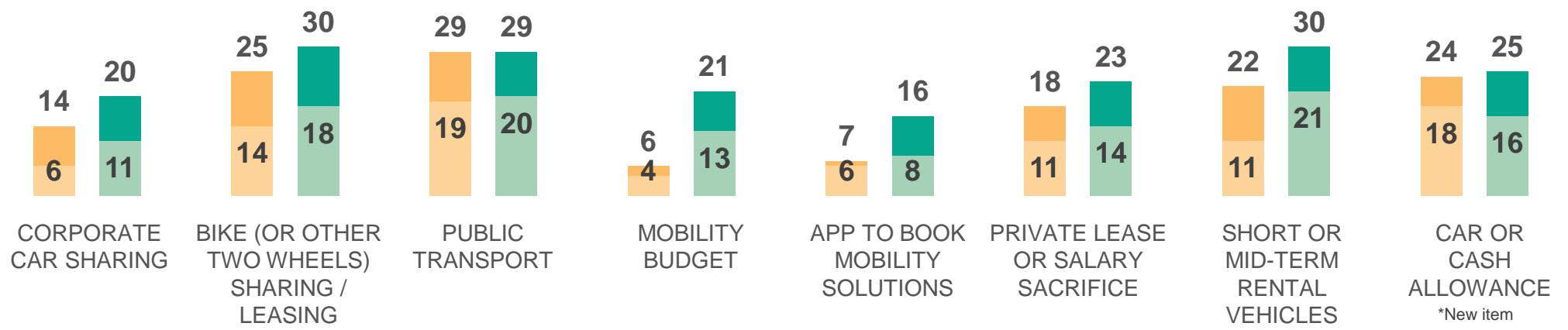
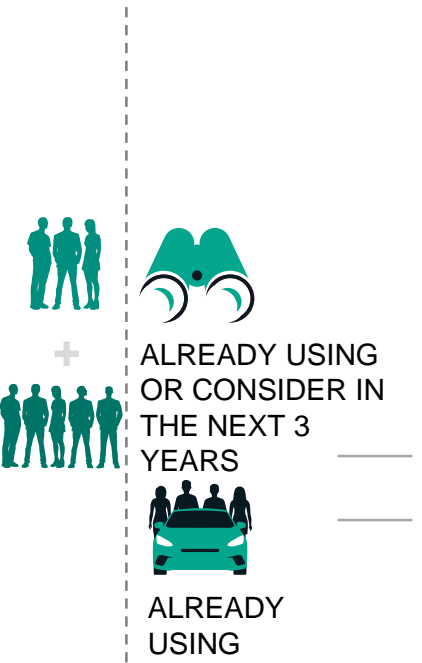
Focus on 100 and more

**71%**

Of companies have already implemented at least one of these solutions



In %



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%

Question asked to respondents that are aware of mobility solutions

# CORPORATE CAR SHARING IMPLEMENTATION

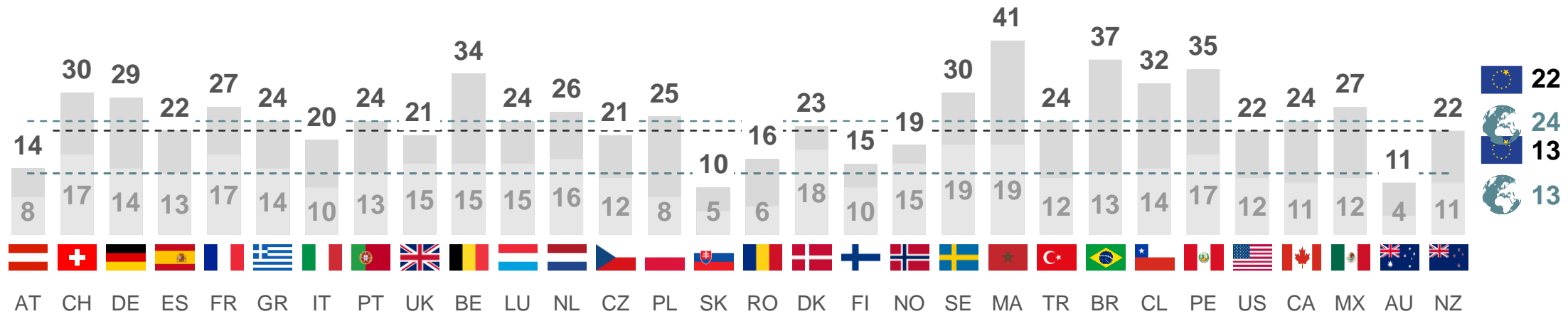
In %



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%  
 Question asked to respondents that are aware of mobility solutions



# CORPORATE CAR SHARING IMPLEMENTATION

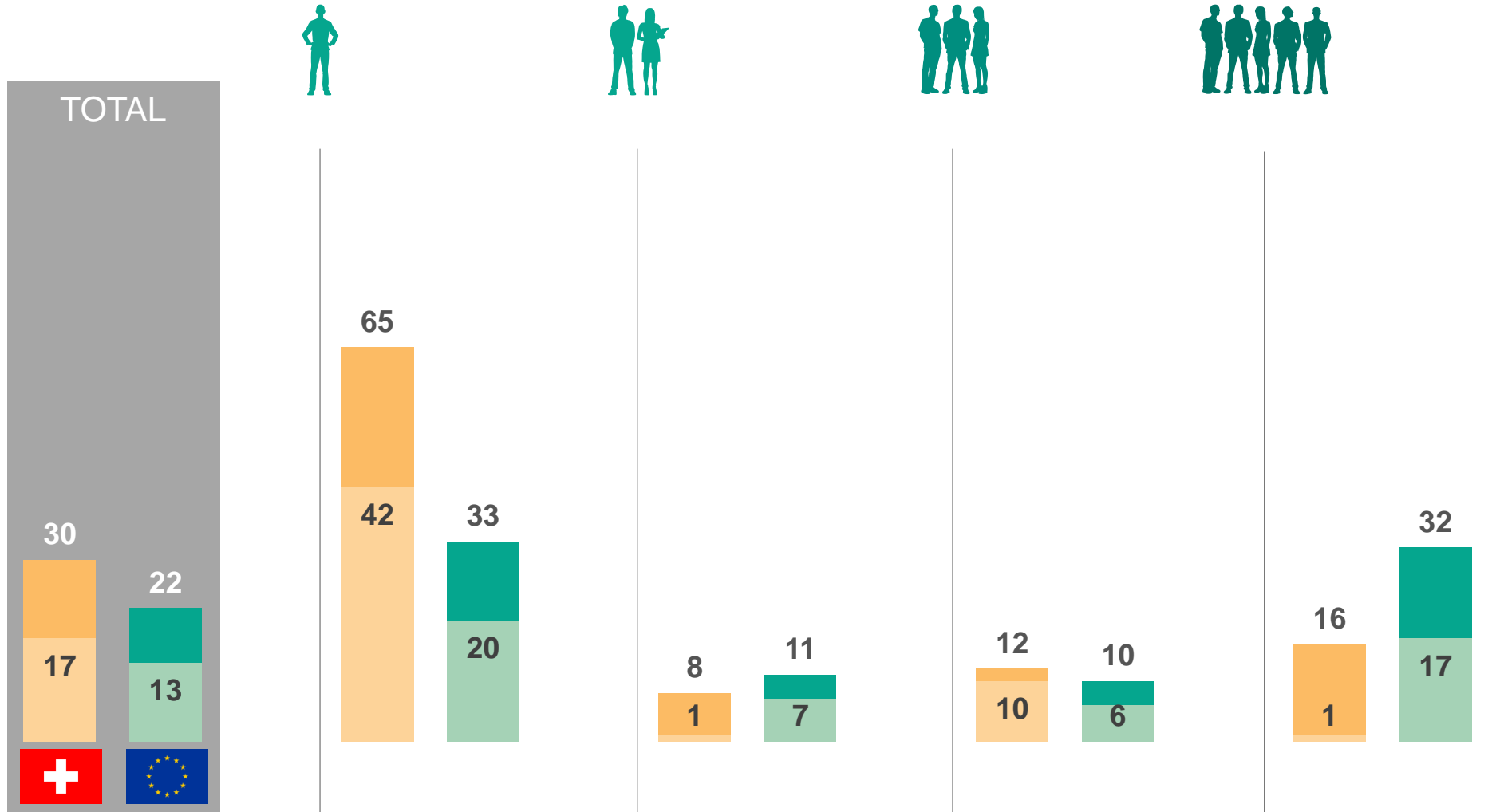
In %



ALREADY USING  
OR CONSIDER IN  
THE 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%  
 Question asked to respondents that are aware of mobility solutions

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

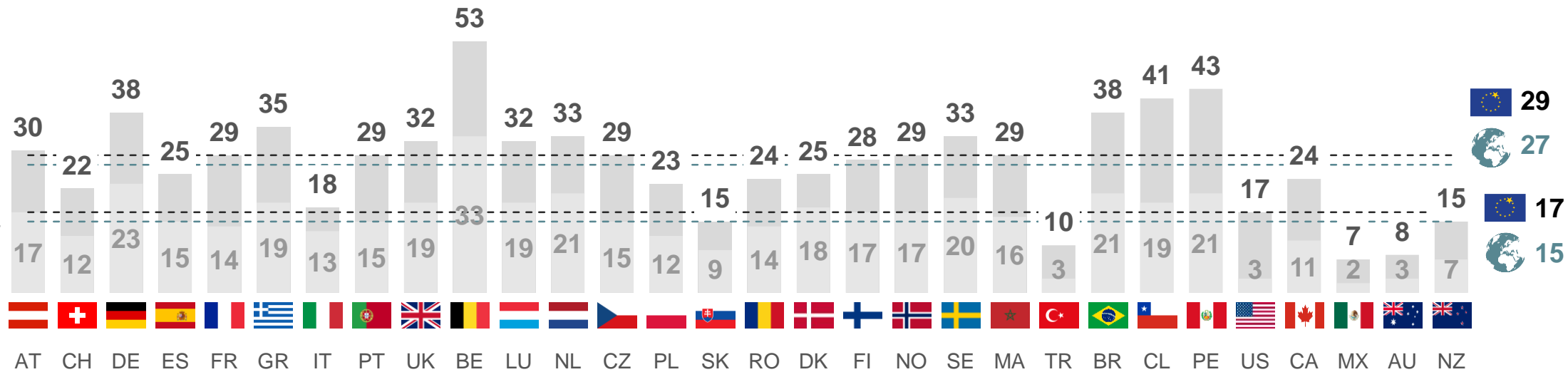
In %



ALREADY USING  
OR CONSIDER IN  
THE 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%  
 Question asked to respondents that are aware of mobility solutions

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

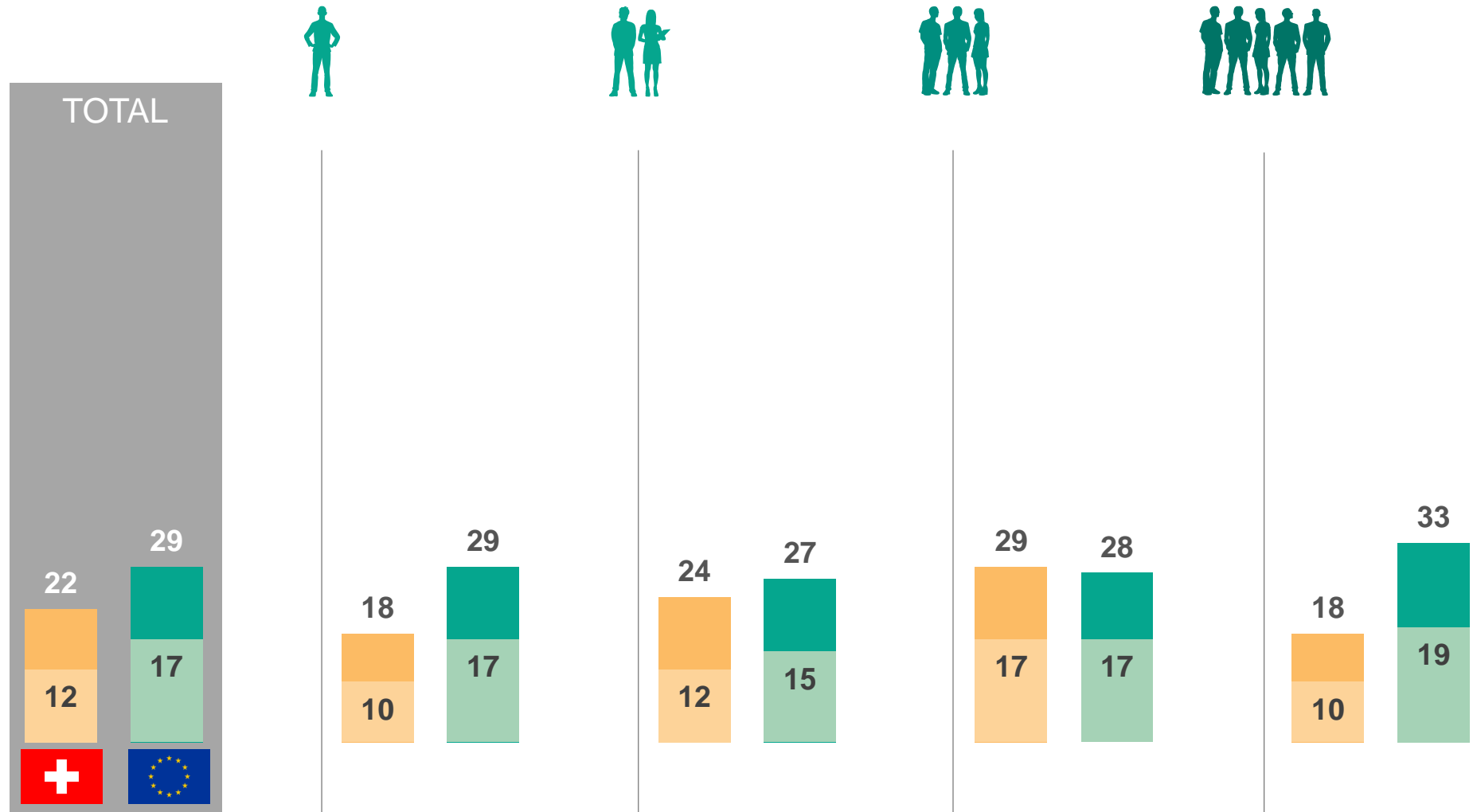
In %



ALREADY USING  
OR CONSIDER IN  
THE 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%  
 Question asked to respondents that are aware of mobility solutions

# PUBLIC TRANSPORT IMPLEMENTATION

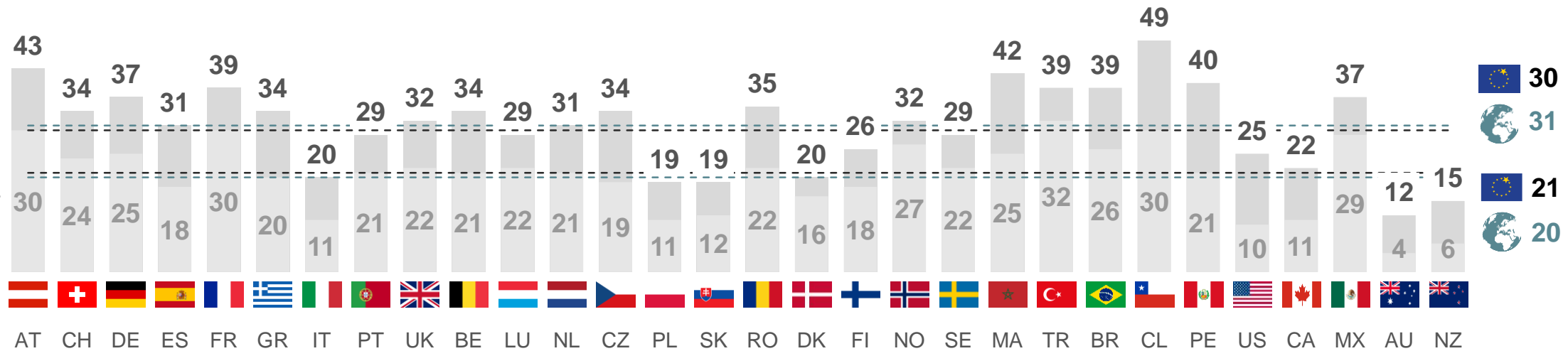
In %



ALREADY USING  
OR CONSIDER IN  
THE 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%  
 Question asked to respondents that are aware of mobility solutions  
 120

# PUBLIC TRANSPORT IMPLEMENTATION

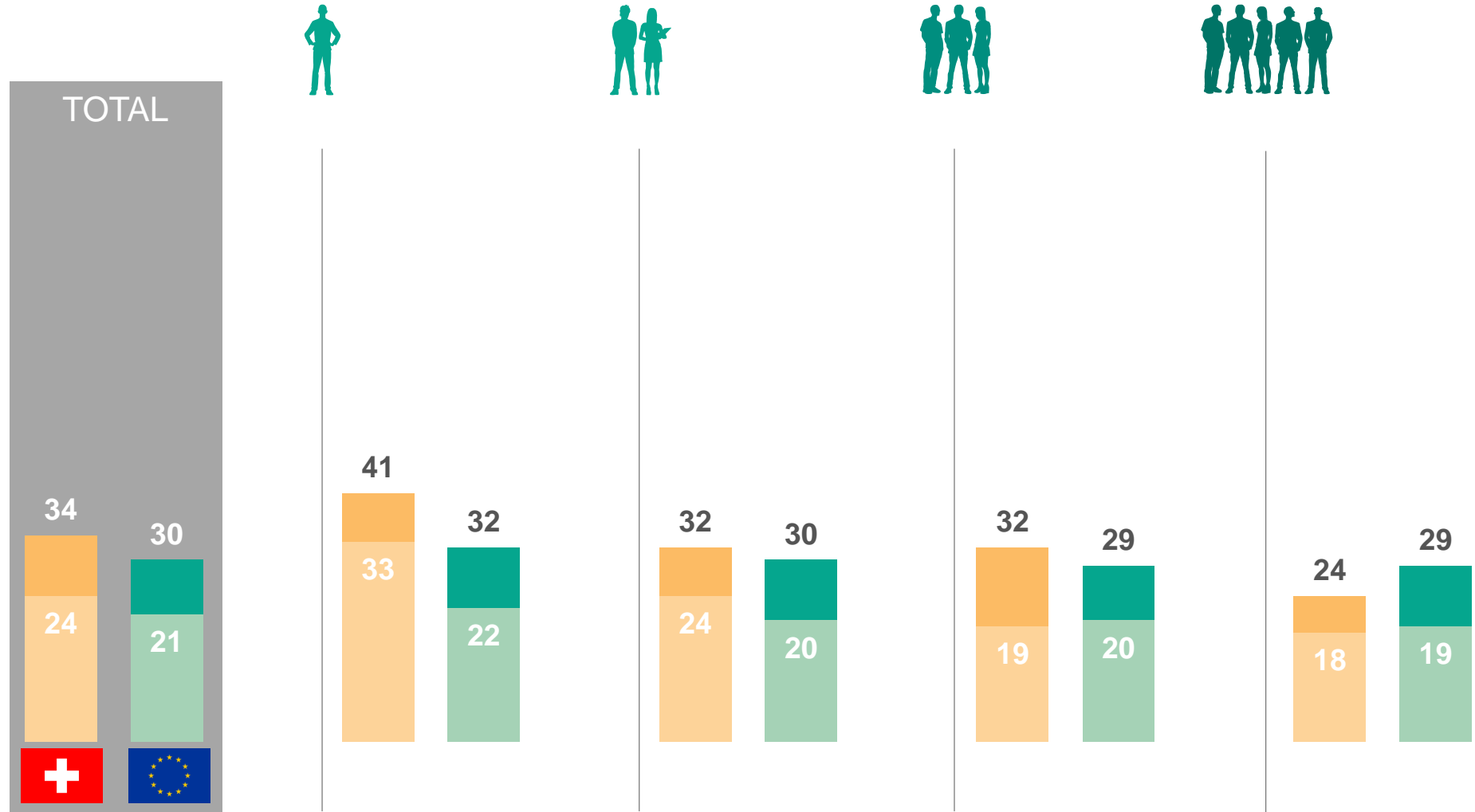
In %



ALREADY USING  
OR CONSIDER IN  
THE 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%  
 Question asked to respondents that are aware of mobility solutions

# MOBILITY BUDGET IMPLEMENTATION

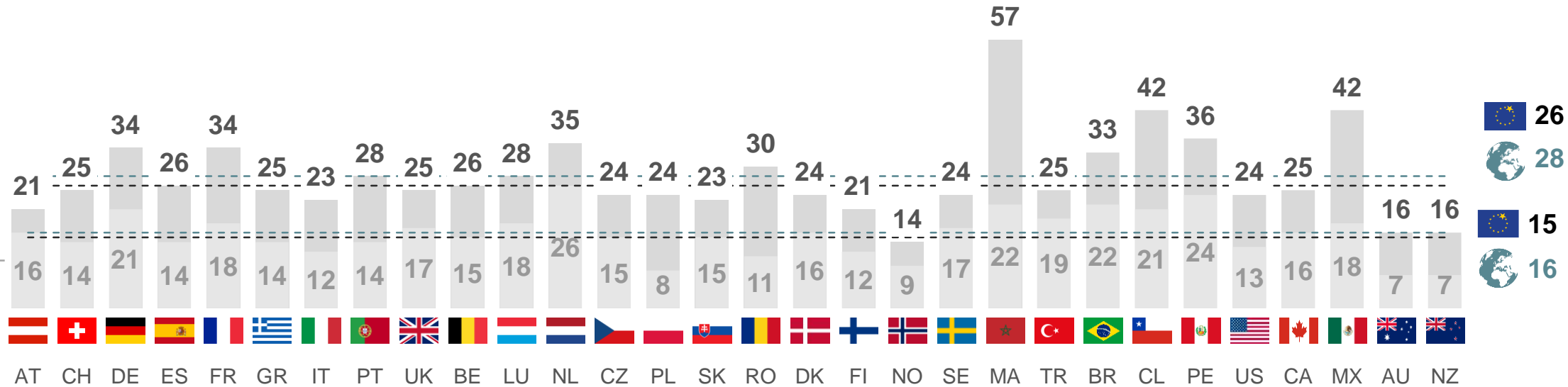
In %



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



EU 26  
Globe 28  
EU 15  
Globe 16

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%  
Question asked to respondents that are aware of mobility solutions  
122

# MOBILITY BUDGET IMPLEMENTATION

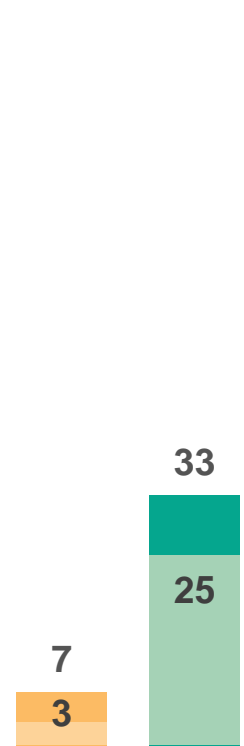
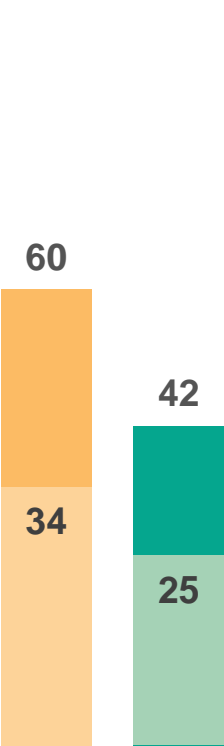
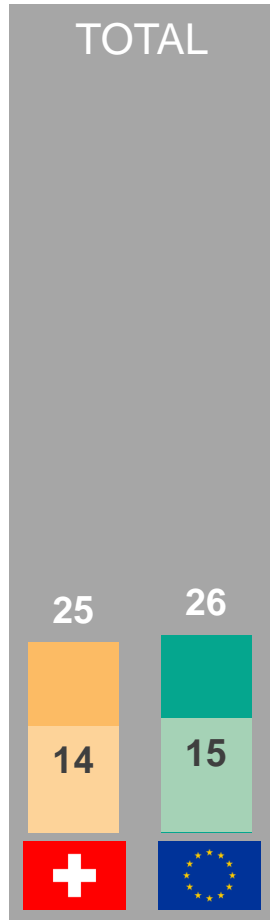
In %



ALREADY USING  
OR CONSIDER IN  
THE 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%  
 Question asked to respondents that are aware of mobility solutions

# AN APP TO BOOK MOBILITY SOLUTIONS IMPLEMENTATION

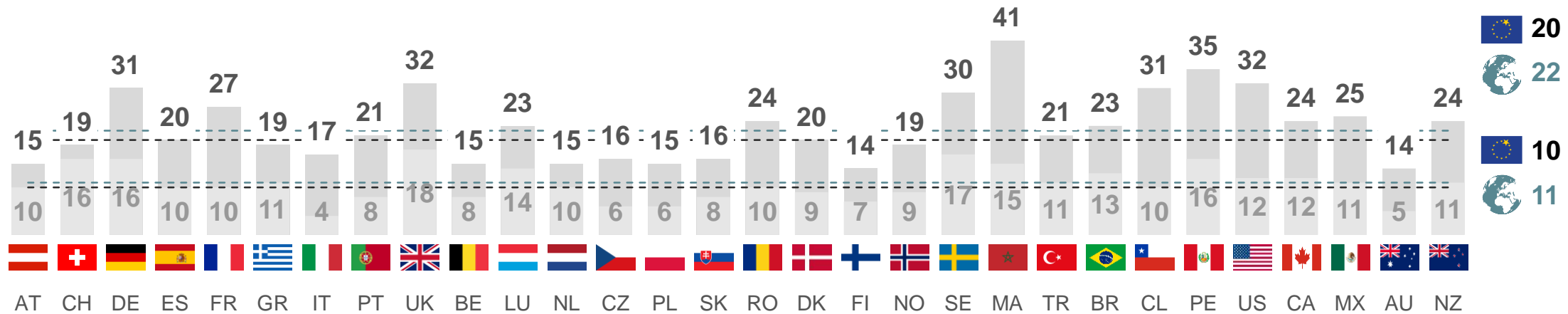
In %



ALREADY USING  
OR CONSIDER IN  
THE 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%  
 Question asked to respondents that are aware of mobility solutions  
 124



# AN APP TO BOOK MOBILITY SOLUTIONS IMPLEMENTATION

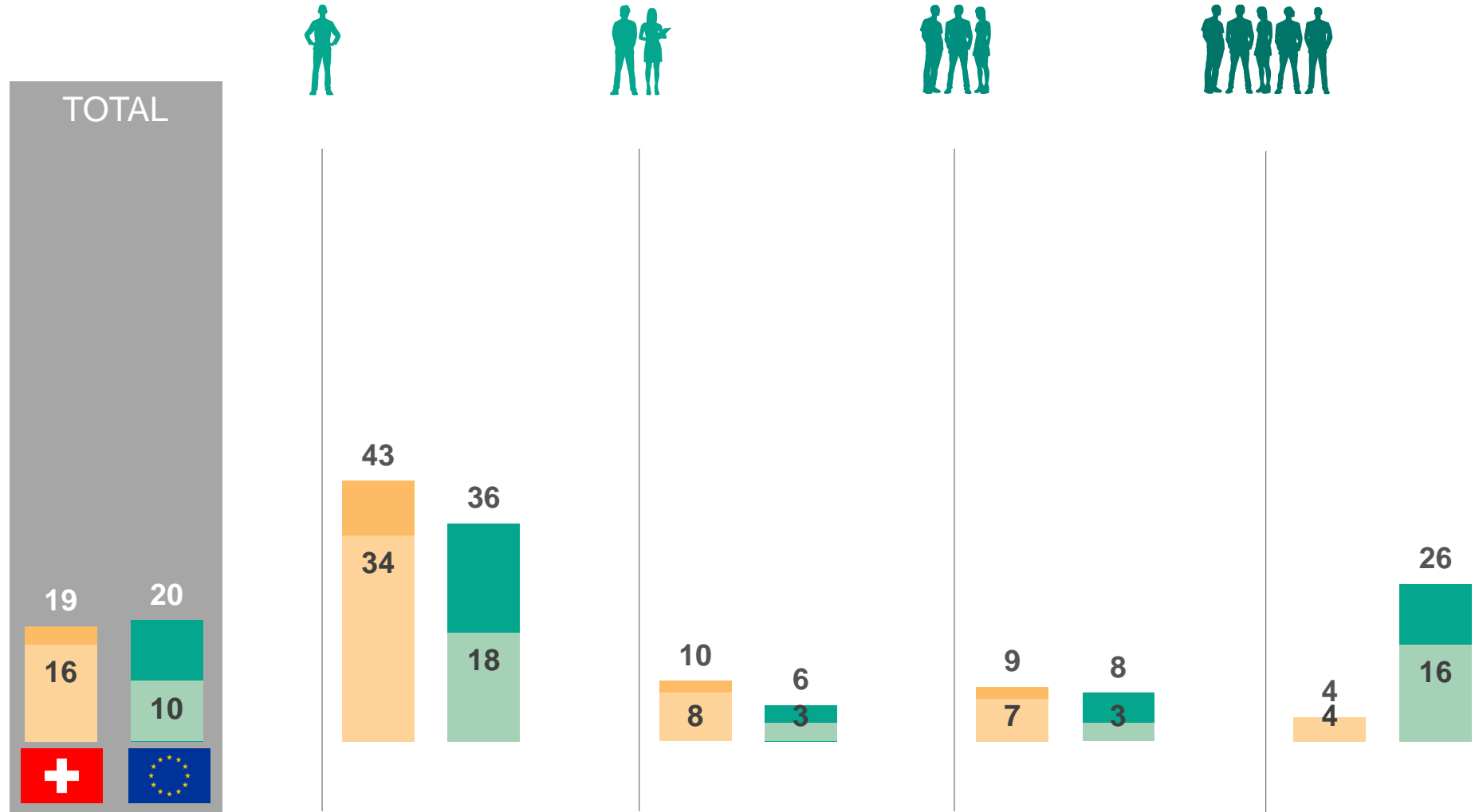
In %



ALREADY USING  
OR CONSIDER IN  
THE 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%  
 Question asked to respondents that are aware of mobility solutions

# PRIVATE LEASE OR SALARY SACRIFICE IMPLEMENTATION

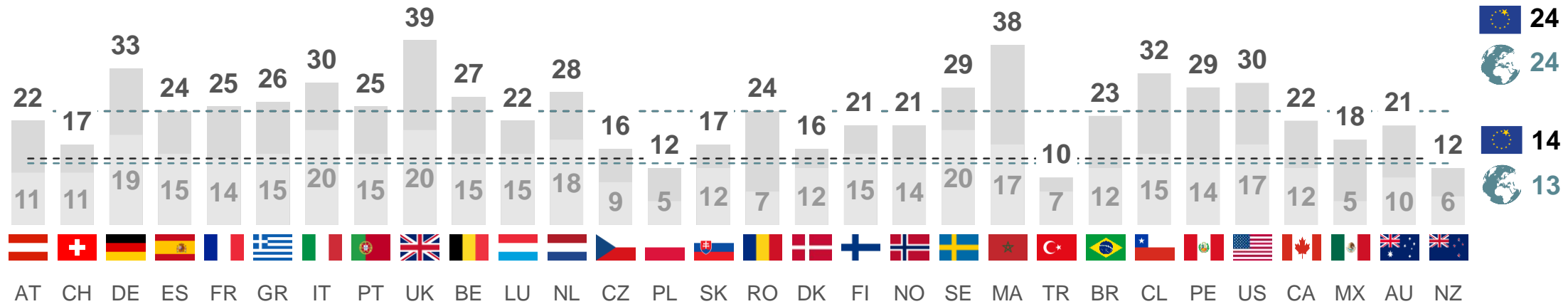
In %



ALREADY USING  
OR CONSIDER IN  
THE 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%  
 Question asked to respondents that are aware of mobility solutions  
 126

# PRIVATE LEASE OR SALARY SACRIFICE IMPLEMENTATION

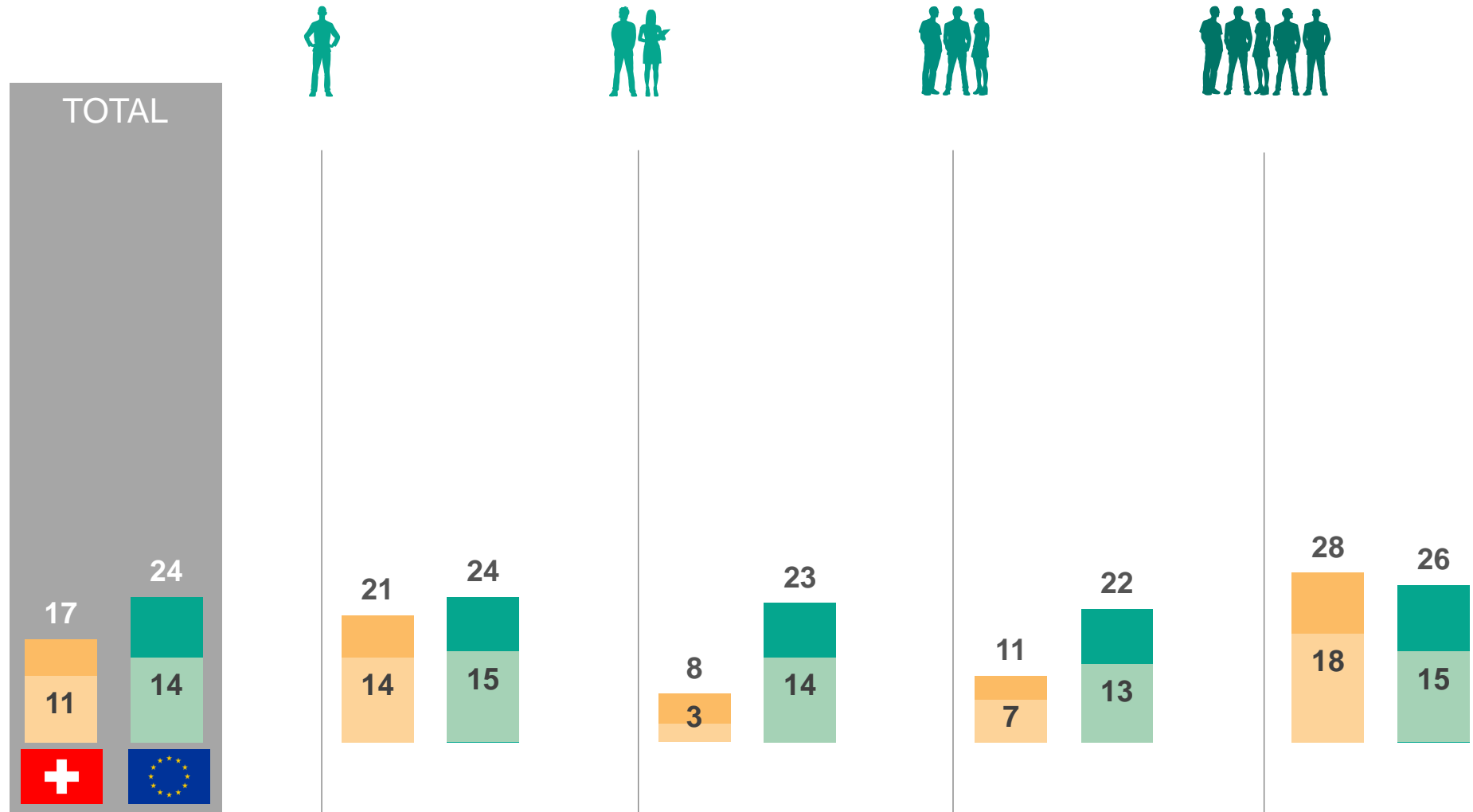
In %



ALREADY USING  
OR CONSIDER IN  
THE 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%  
 Question asked to respondents that are aware of mobility solutions

# SHORT OR MID-TERM RENTAL VEHICLES IMPLEMENTATION

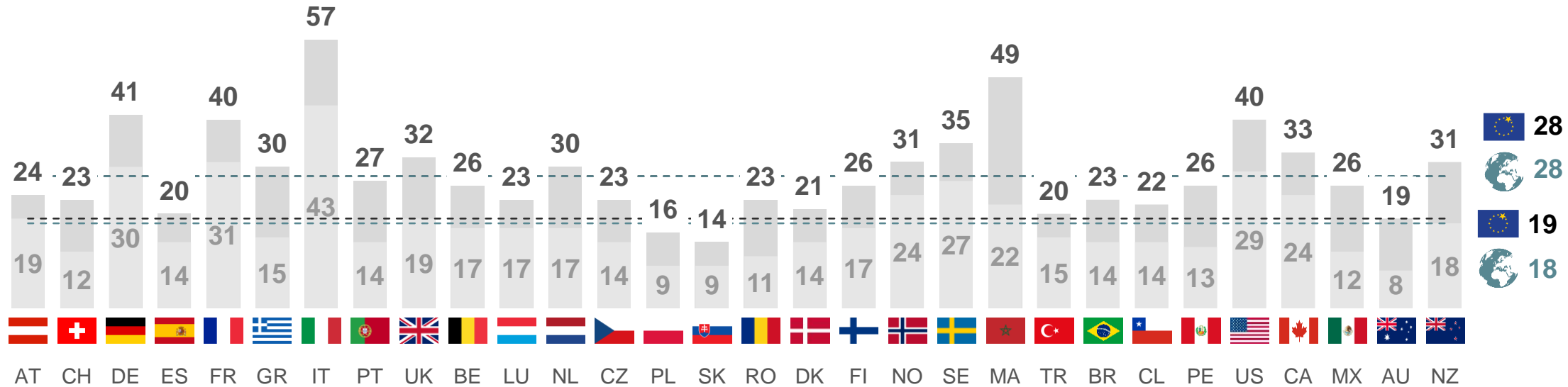
In %



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



EU 28  
Globe 28  
EU 19  
Globe 18

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%  
Question asked to respondents that are aware of mobility solutions  
128

# SHORT OR MID-TERM RENTAL VEHICLES IMPLEMENTATION

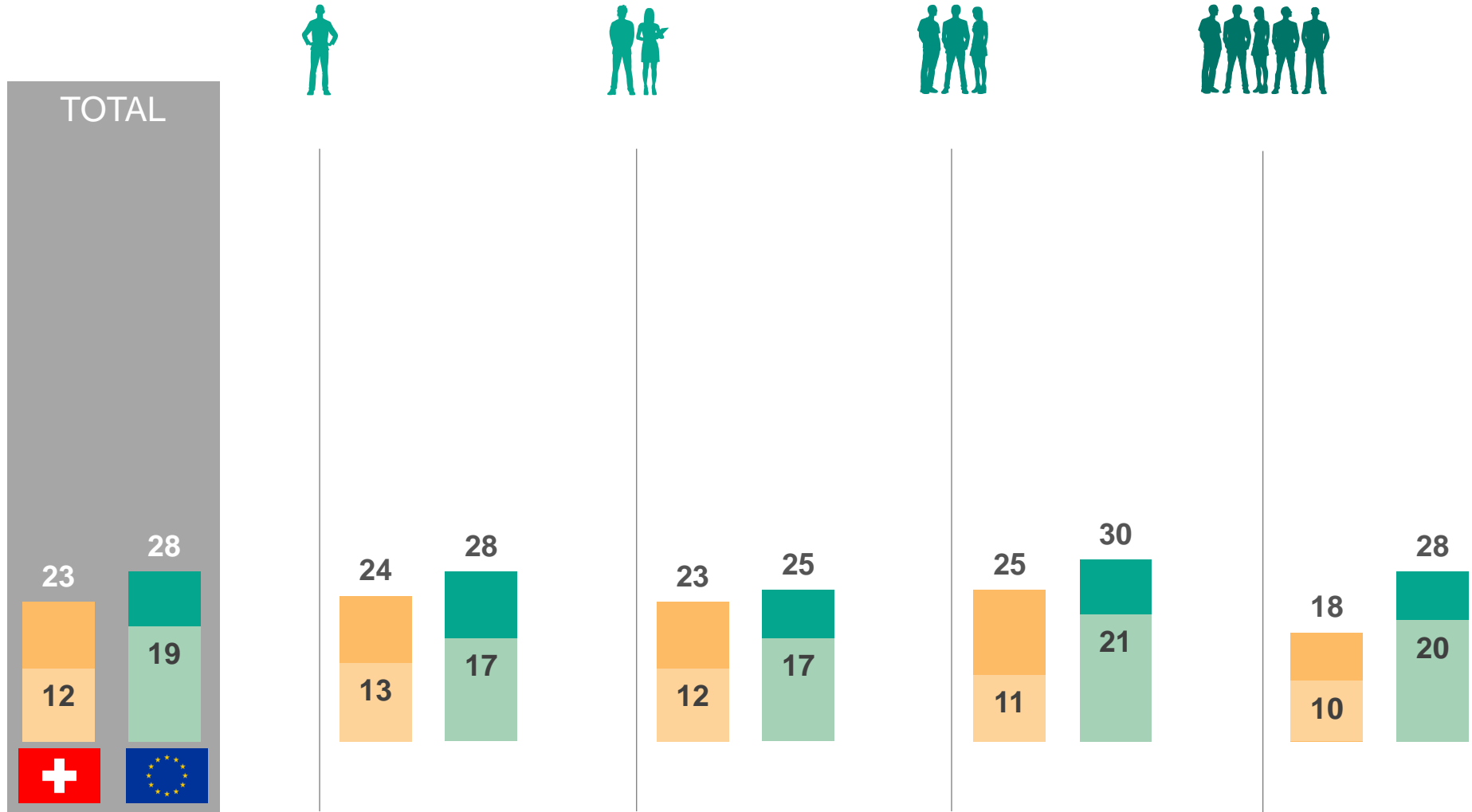
In %



ALREADY USING  
OR CONSIDER IN  
THE 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%  
 Question asked to respondents that are aware of mobility solutions

# CAR OR CASH ALLOWANCE IMPLEMENTATION

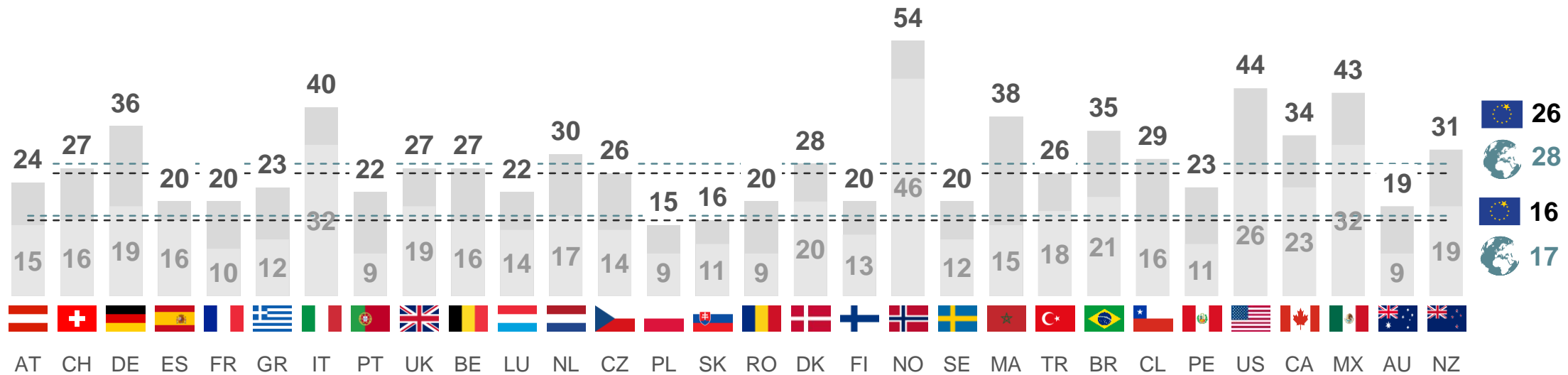
In %



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



EU 26  
Globe 28  
EU 16  
Globe 17

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%  
Question asked to respondents that are aware of mobility solutions  
130

# CAR OR CASH ALLOWANCE IMPLEMENTATION

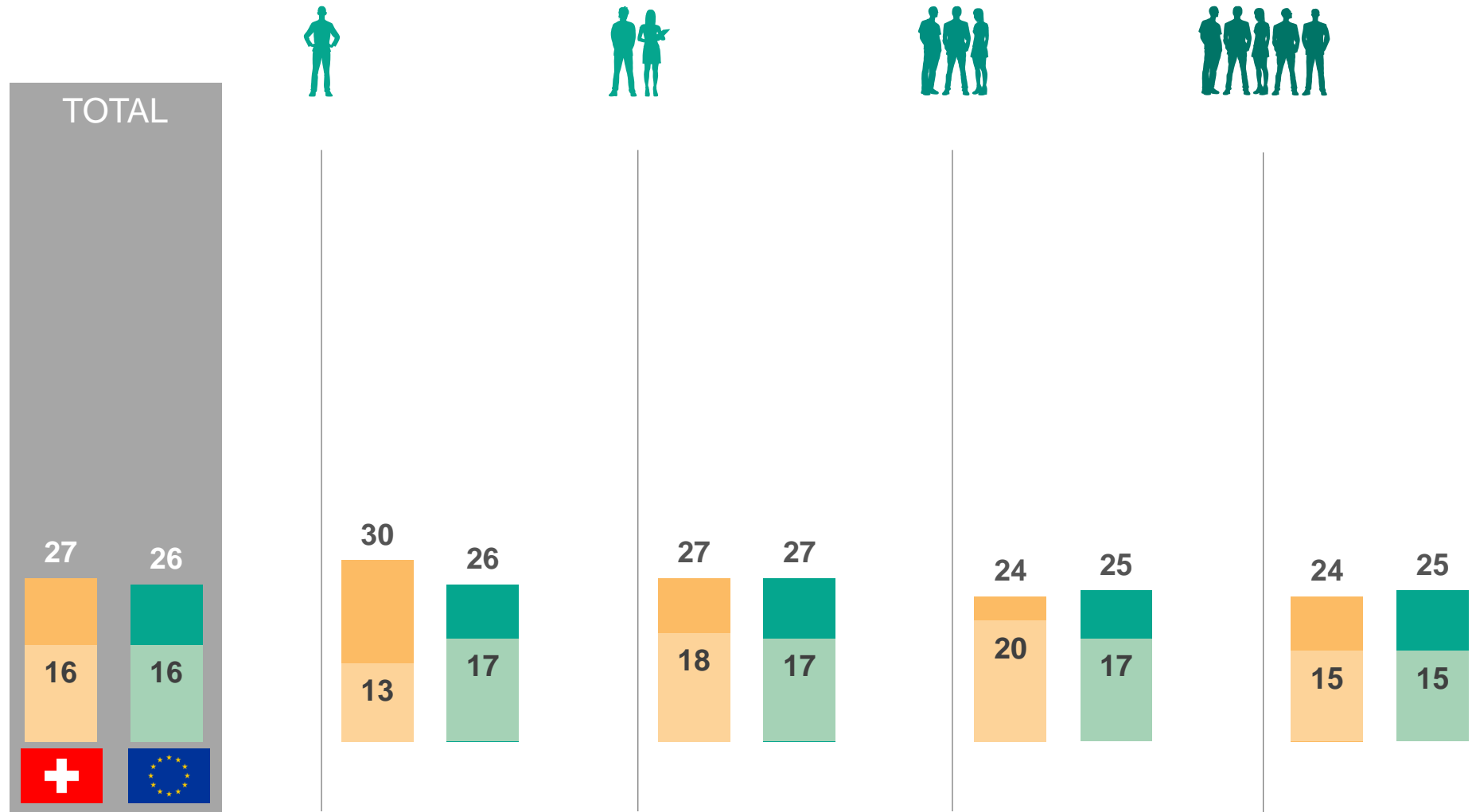
In %



ALREADY USING  
OR CONSIDER IN  
THE 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%  
 Question asked to respondents that are aware of mobility solutions

# REASONS TO OFFER A MOBILITY BUDGET

In %



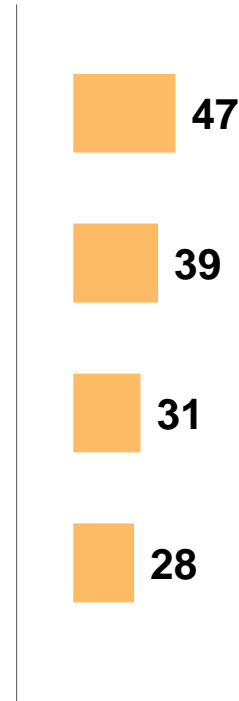
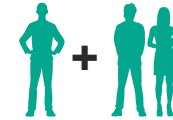
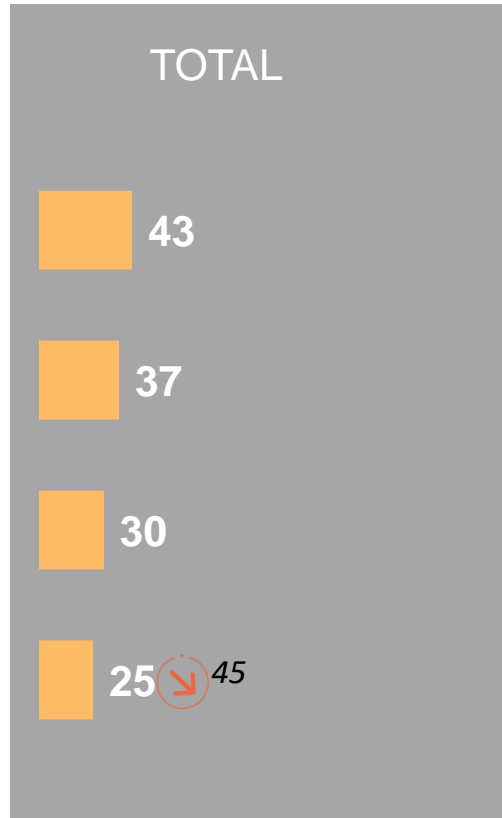
Passenger cars + LCVs

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

It brings lower cost of mobility

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

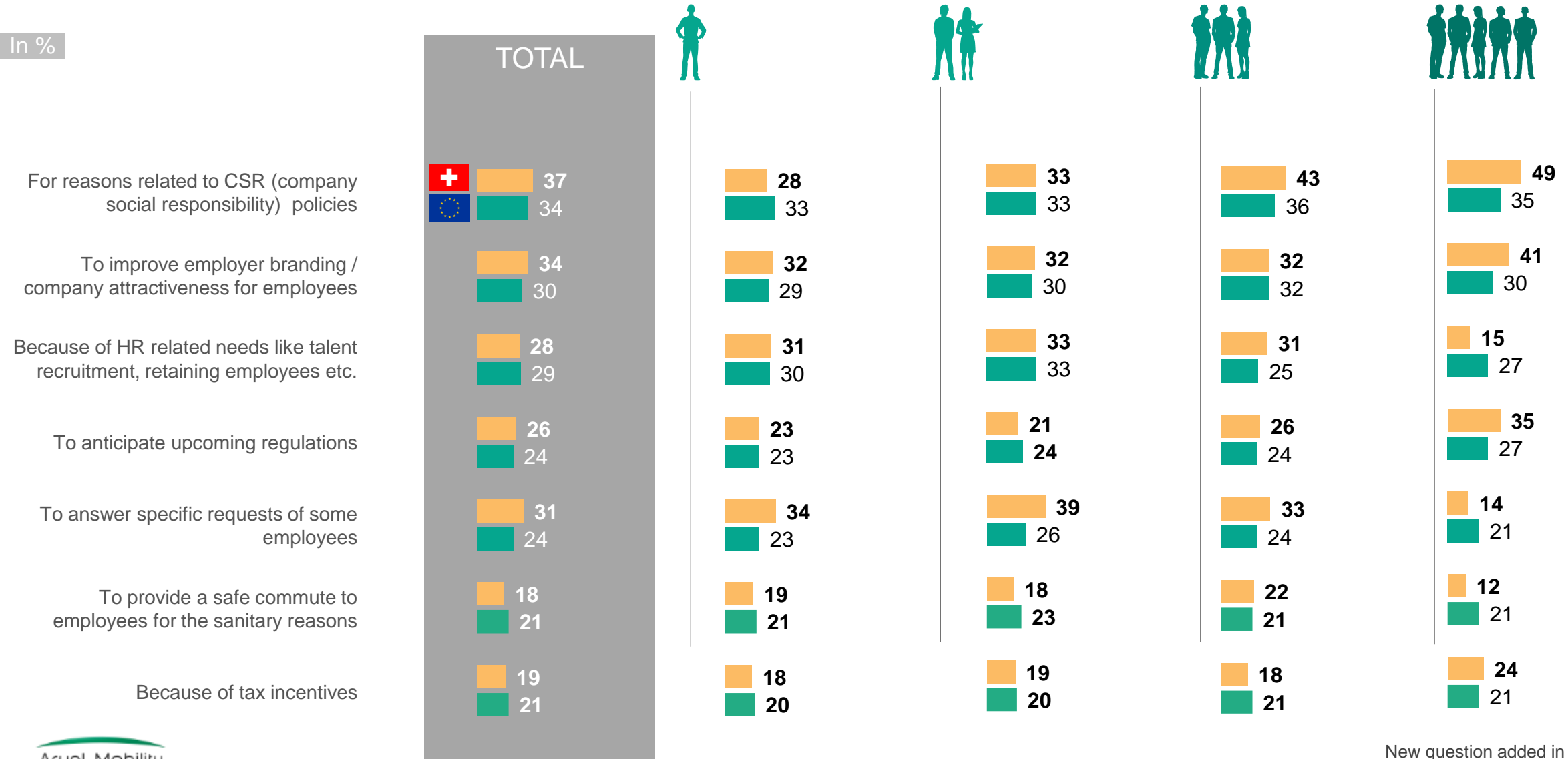
Higher productivity as a result of different use of time





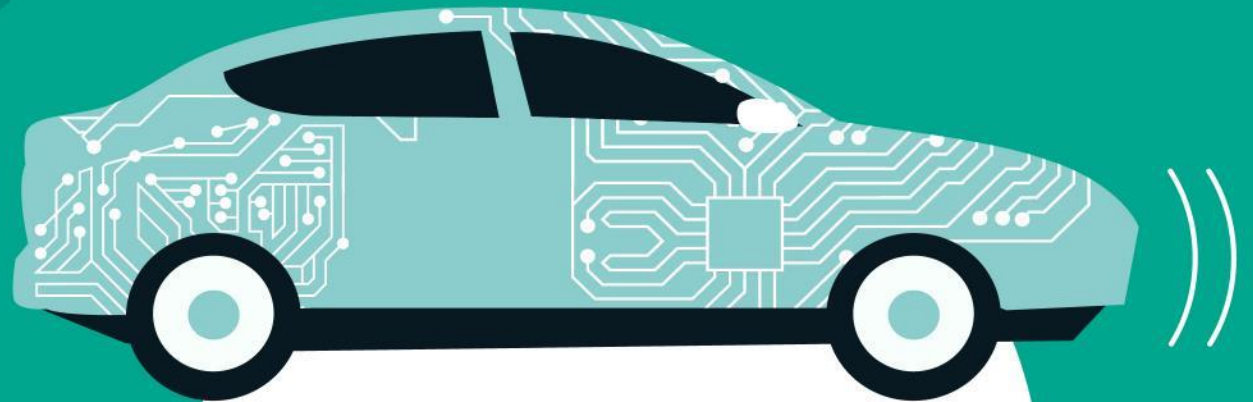
# REASONS FOR IMPLEMENTING OR CONSIDERING MOBILITY SOLUTIONS

In %



7

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



# THE USE OF TELEMATICS IS STRENGTHENING IN SWITZERLAND, ESPECIALLY FOR LCVS

1

In line with the European trend, **the use of connected vehicles is increasing** in Switzerland this year, with **40% of Swiss companies using telematics tools for their fleet.**

In detail, this increase is mostly driven by LCVs, jumping from 18% last year to 28% in 2023, while telematics is booming among mid-size companies which are now catching up with larger ones.

2

The **main reasons** to use telematics slightly evolve this year:

- **Improve drivers safety / behaviours** (more important in large companies)
- **Reduce fleet costs** (more important in small companies)
- **Locate vehicles and improve vehicle security** (more important in small companies)
- **Improve operational efficiency** (more important in larger companies)

3

Connectivity is now **slightly more implemented among LCVs (28%)** than among passenger cars (24%), Swiss companies being not very far from the European average in both cases.

# CONNECTED VEHICLES



## USE OF TELEMATICS



40%

30



44%

33



## TOP 3 REASONS



42%



30%

#1 To improve drivers safety / behaviours

#2 To reduce fleet costs

30%

25%

#3 To locate vehicles or improve vehicle security

29%

37%

# PROPORTION OF COMPANIES USING CONNECTED VEHICLES

All vehicles

In %



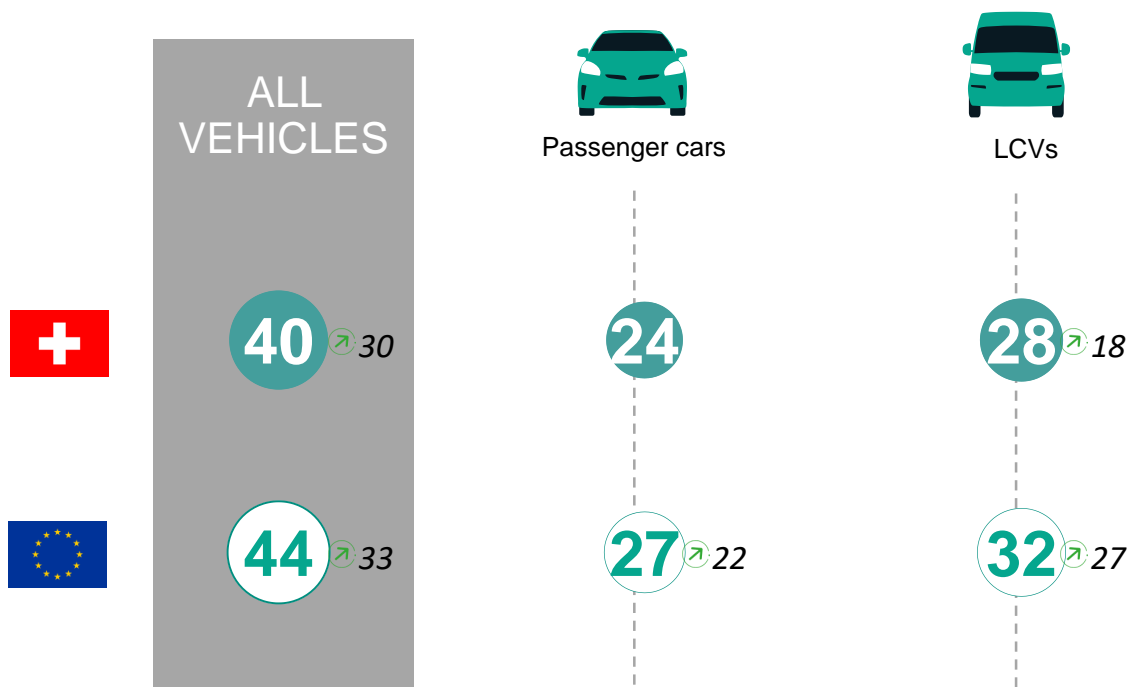
Passenger cars + LCVs

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

## HOW TO READ THE RESULTS ?

40% of companies with fleet using connected vehicles for all or part of their fleet.

24% use connected vehicles for passenger cars, while 28% use connected vehicles for 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

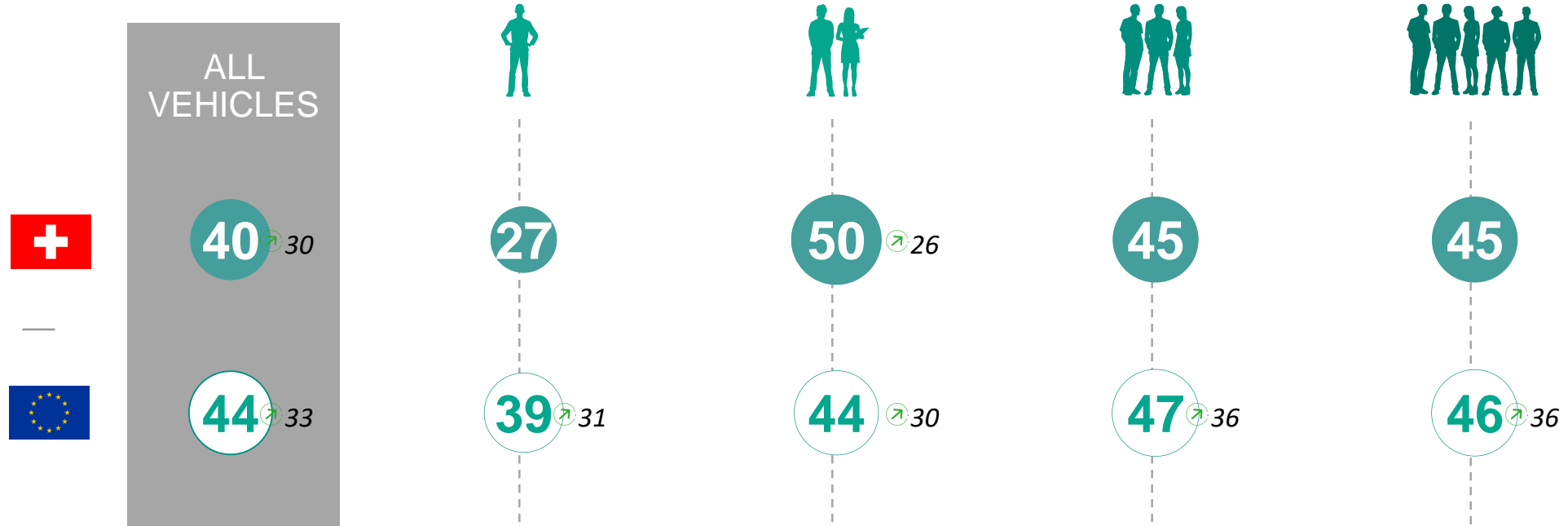
All vehicles

In %



Passenger cars + LCVs

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



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

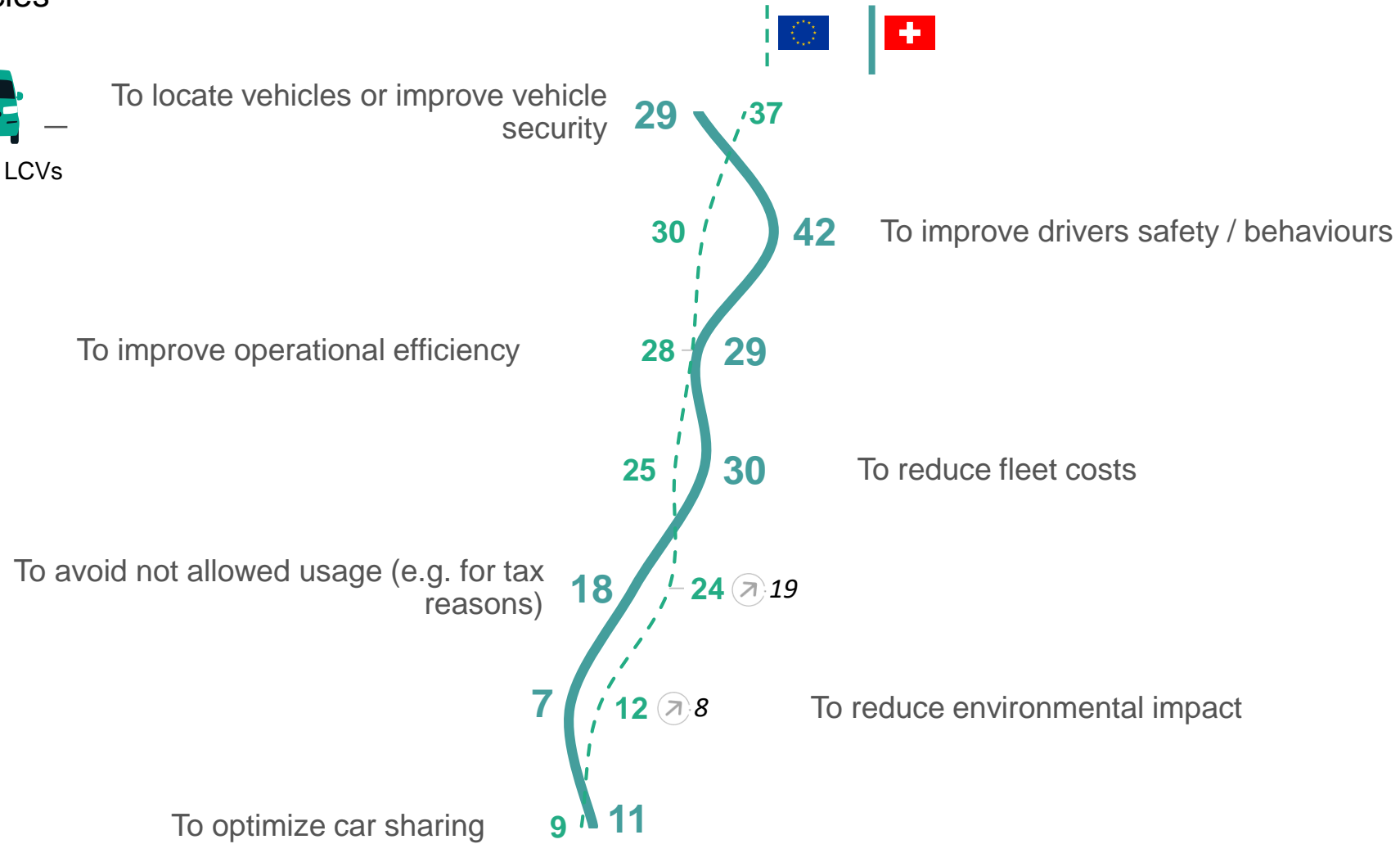
# REASONS FOR USING CONNECTED VEHICLES

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

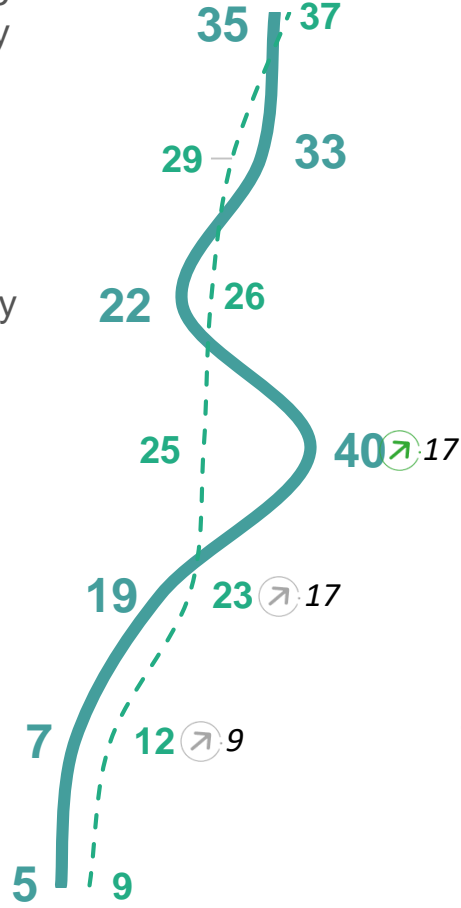
To locate vehicles or improve vehicle security

To improve operational efficiency



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

To optimize car sharing



To improve drivers safety / behaviours

To reduce fleet costs

To reduce environmental impact

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 100 and more

In %



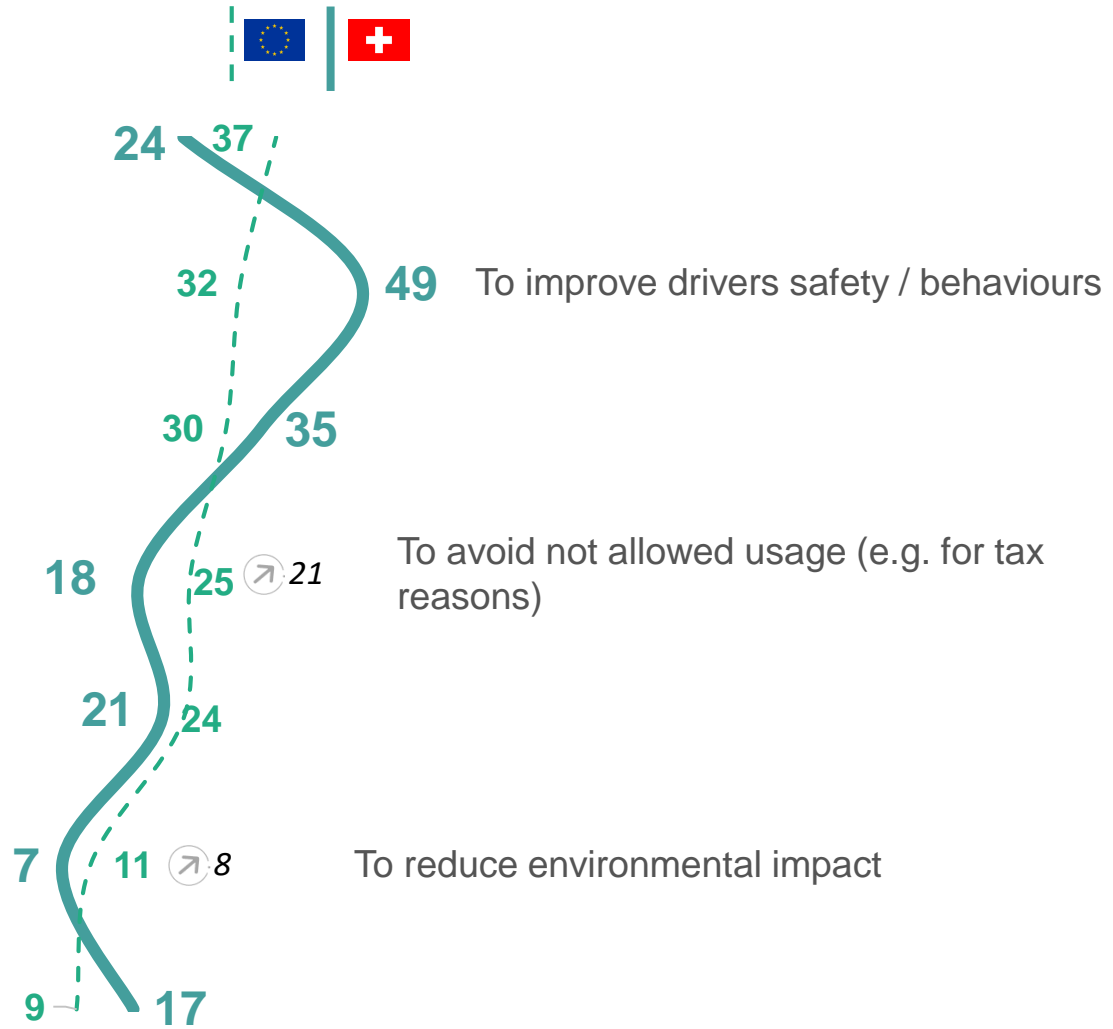
Passenger cars + LCVs

To locate vehicles or improve vehicle security

To improve operational efficiency

To reduce fleet costs

To optimize car sharing

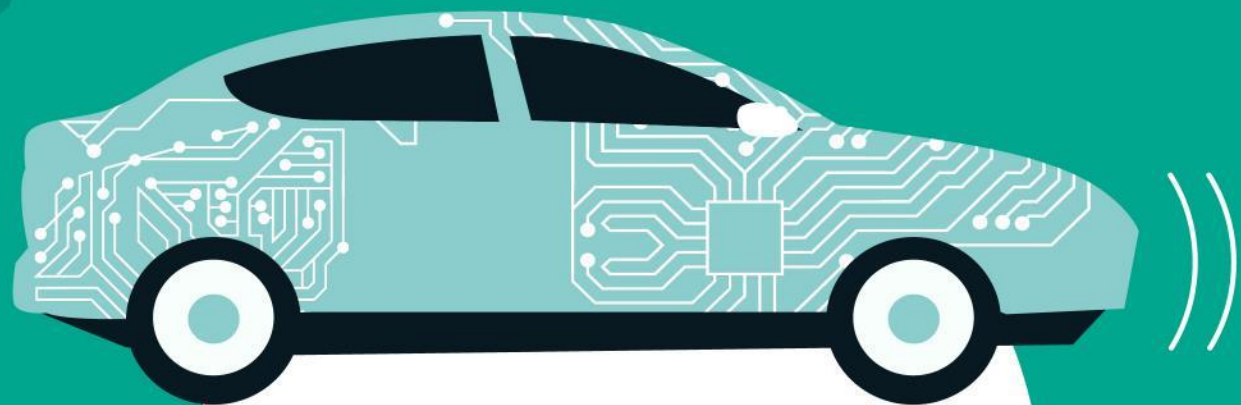


What are the two main reasons why your fleet is connected by Telematics?  
**Basis: companies with connected vehicles thanks to Telematics**

7

# CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY

## A. PASSENGER CARS



# PROPORTION OF COMPANIES USING CONNECTED VEHICLES

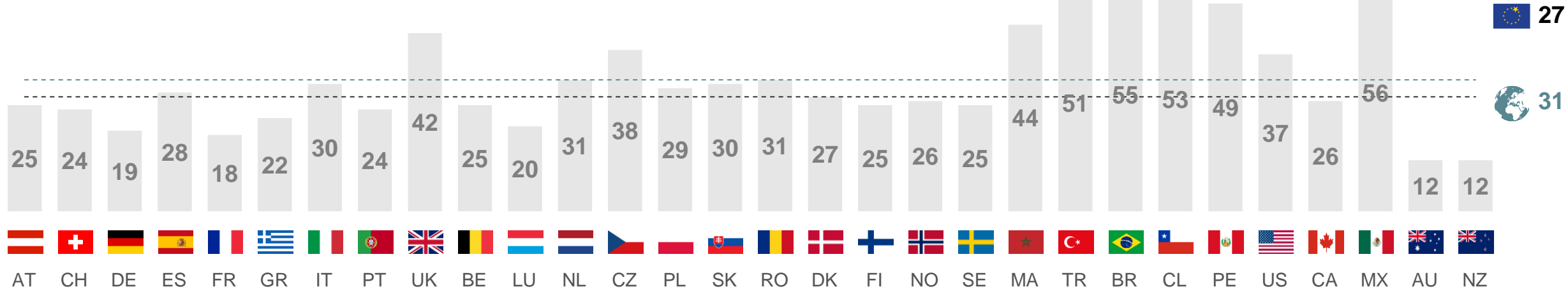
Passenger cars

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**

# PROPORTION OF COMPANIES USING CONNECTED VEHICLES

## Passenger cars

In %

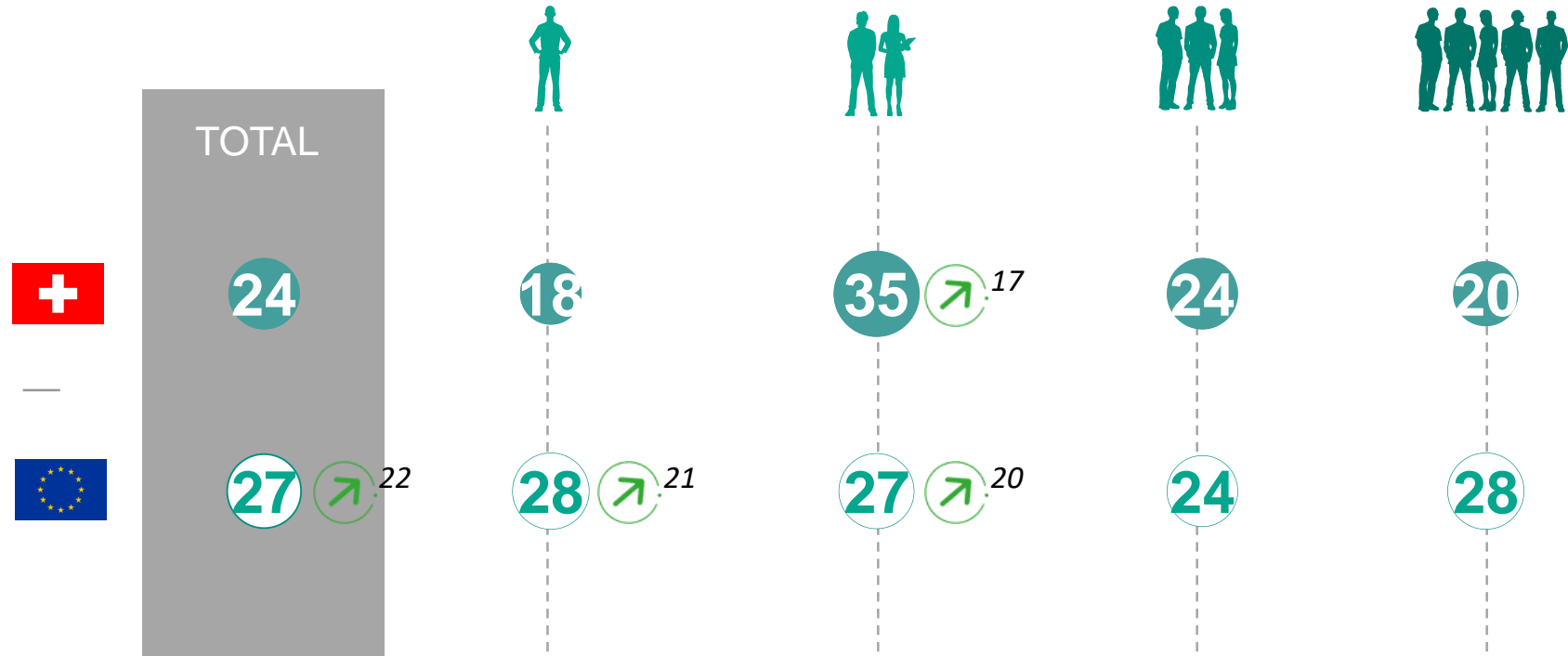


Passenger cars

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

HOW TO READ THE RESULTS ?

24% use connected vehicles for 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 at least one passenger car in fleet**

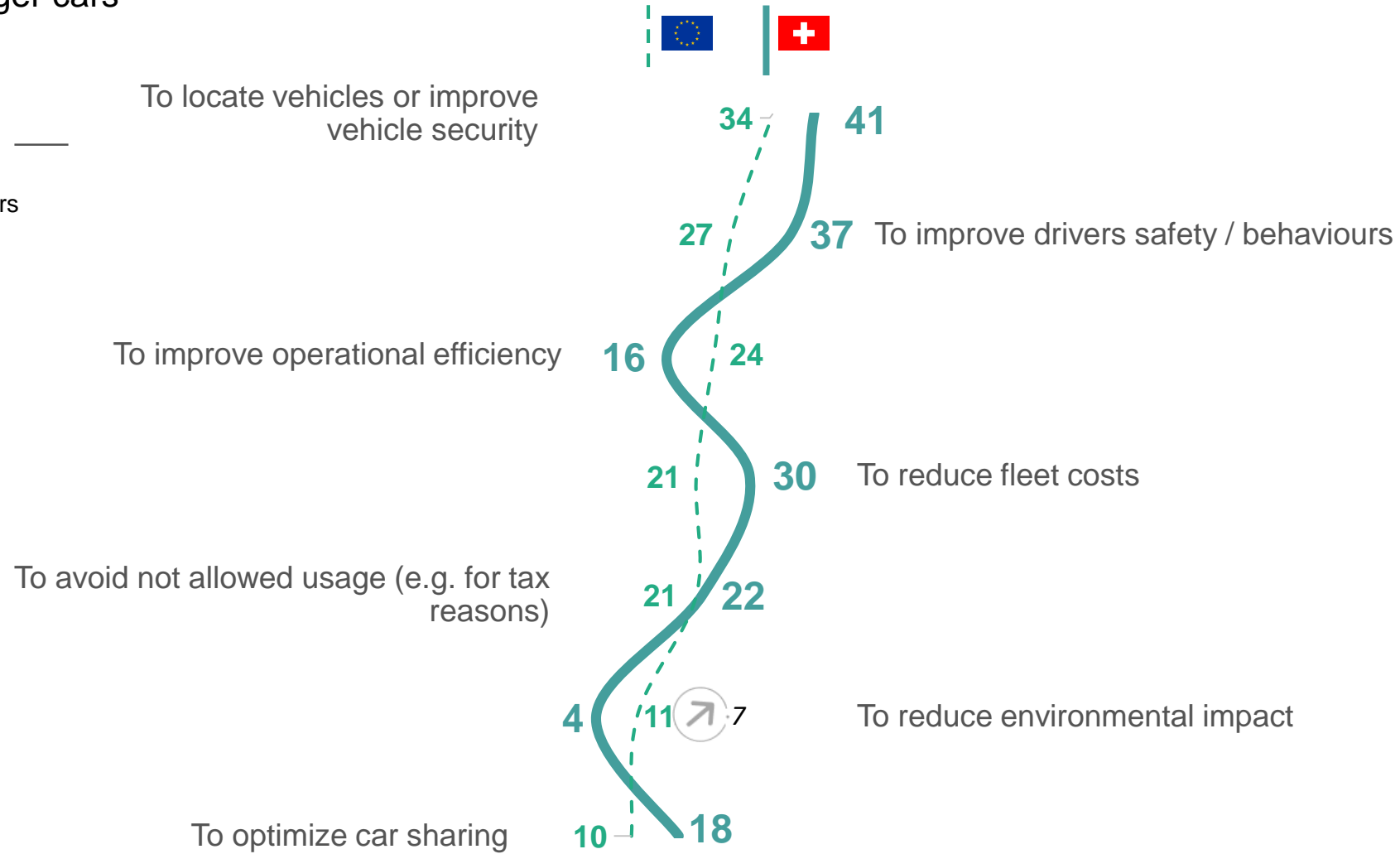
# REASONS FOR USING CONNECTED VEHICLES

## Passenger cars

In %



Passenger cars

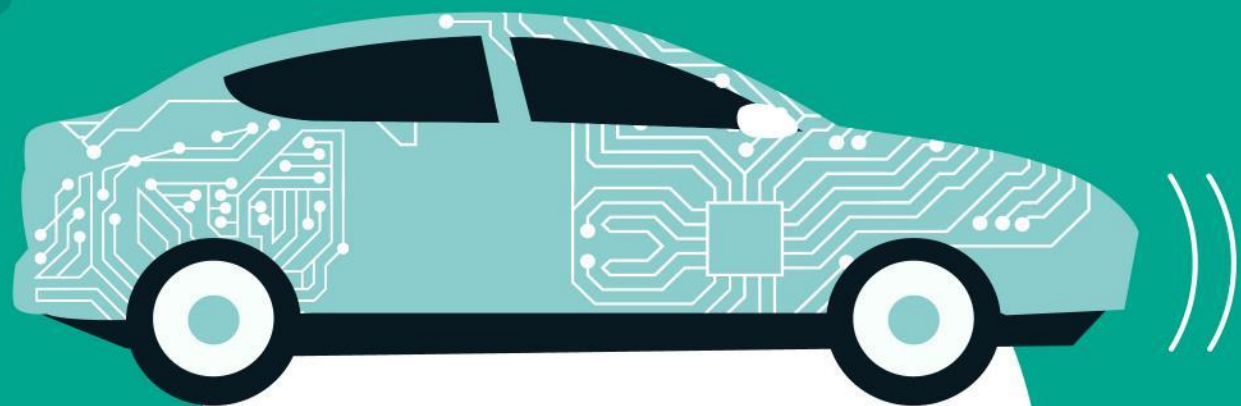


What are the two main reasons why your fleet is connected by Telematics?  
Basis: companies with connected passenger cars thanks to Telematics

7

# CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY

## B. LCVs



# PROPORTION OF COMPANIES USING CONNECTED VEHICLES

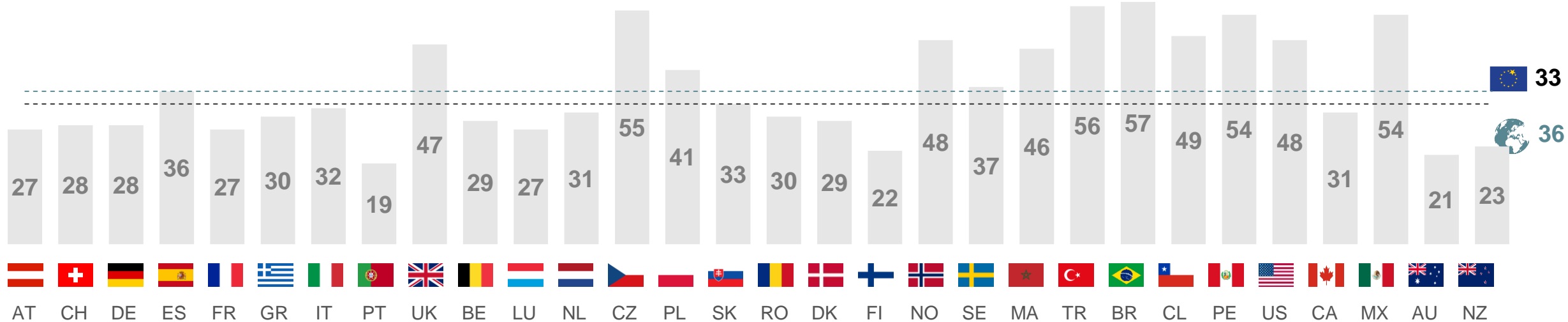
LCVs

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 %

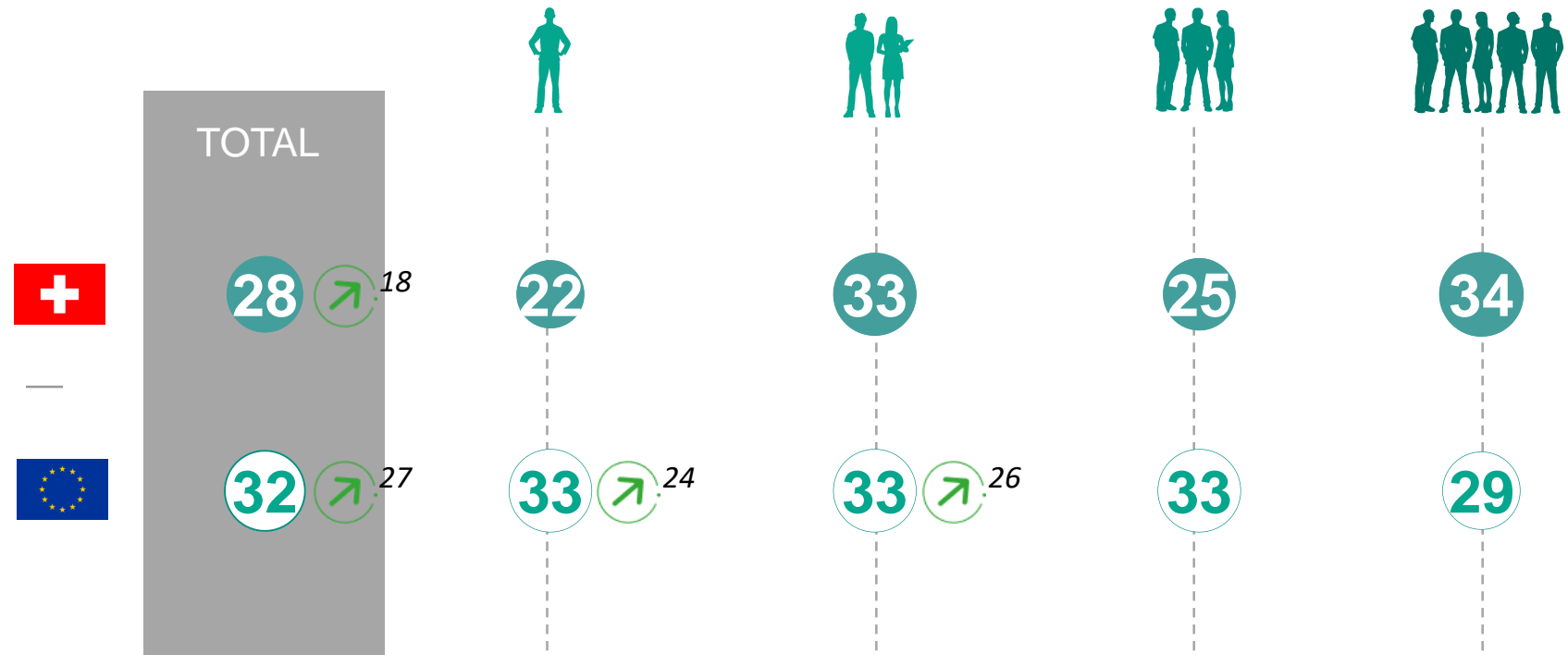


LCVs

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

HOW TO READ THE RESULTS ?

28% use connected vehicles for 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 at least one LCV car in fleet**



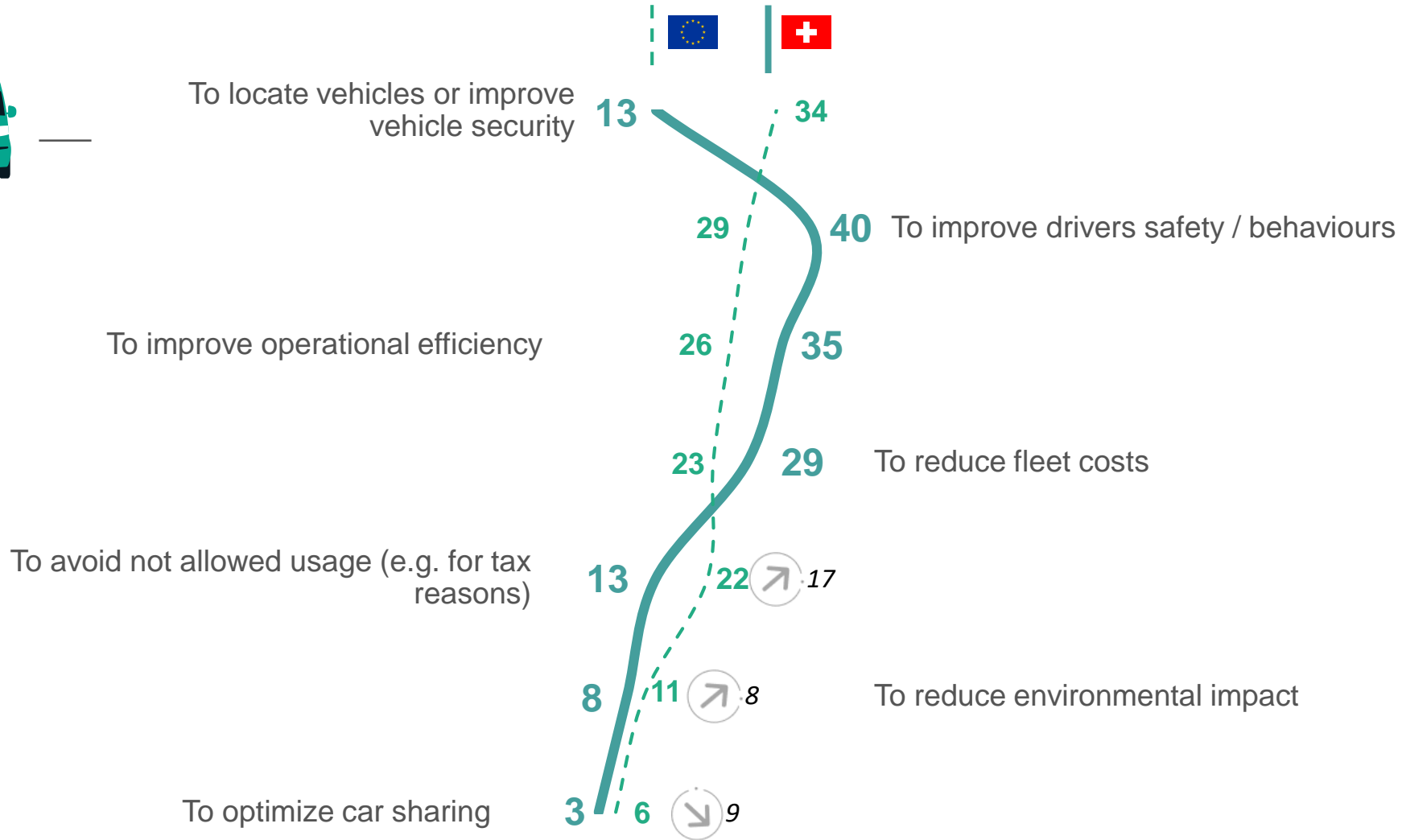
# REASONS FOR USING CONNECTED VEHICLES

LCVs

In %



LCVs



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



The logo for Arval Mobility Observatory, featuring the text "Arval Mobility Observatory" in a green, sans-serif font, enclosed within a green, stylized oval shape.

Arval Mobility  
Observatory

A close-up, low-angle shot of the side of a dark blue car, showing the front wheel and the lower part of the body. The car is parked on a gravel surface. In the background, there are trees with yellow and green leaves, suggesting an autumn setting. The lighting is bright and natural.

**Thank you**





# APPENDIX

