

Arval Mobility
Observatory



MOBILITY AND FLEET BAROMETER 2021 Global Report



KANTAR

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Context and methodology

..... *p3*

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Executive summary

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What are the main characteristics of the fleets?

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..... *p90*

1

CONTEXT AND METHODOLOGY



KEY THEMES OF THE SURVEY



1

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



2

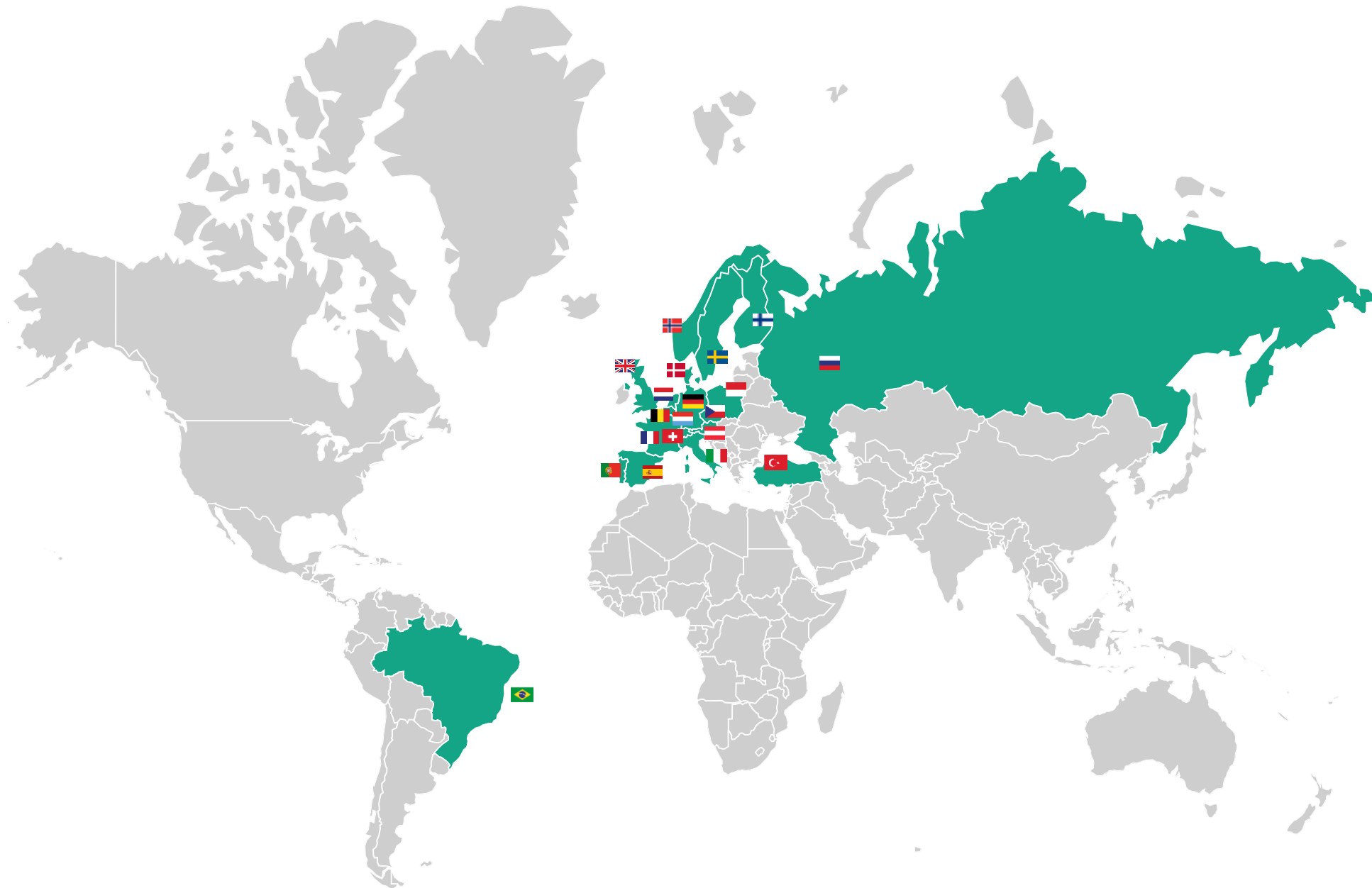
WHAT KIND OF VEHICLES WILL THE MARKET EXPECT IN 3 YEARS?



3

HOW WILL NEW MOBILITY SOLUTIONS AFFECT BUSINESS MODELS?

PERIMETER OF THE SURVEY



METHODOLOGY

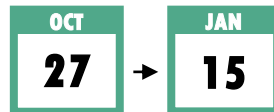


DATA COLLECTION METHOD

CATI CAWI SYSTEM
Recruitment by telephone and a link is sent to complete the survey online



FIELDWORK PERIOD



TARGET

FLEET MANAGERS
in companies of all industries using at least **1 CORPORATE VEHICLE**



QUOTAS

COMPANY SIZE & SECTOR



SAMPLE

4 443 | through Europe
754 | Outside of Europe: Brazil, Russia, Turkey
5 197 | Interviews in total



DURATION OF INTERVIEW

10 minutes on average

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 previous year
XX = score 2020



XX | Significantly lower than previous year
XX = score 2020

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

NUMBER OF INTERVIEWS CONDUCTED IN WORLD

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



Companies with less than 10 employees

1704 INTERVIEWS



Companies with 10 to 99 employees

1056 INTERVIEWS



Companies with 100 to 249/499/999 employees

1386 INTERVIEWS



Companies with 250/500/1000 employees and more

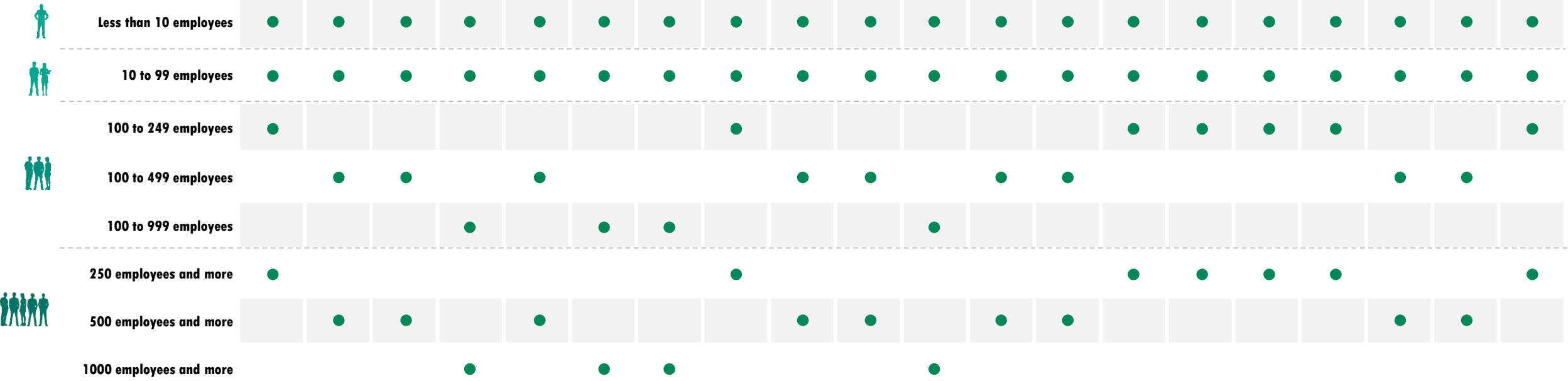
1051 INTERVIEWS

**1 to 99
employees
2760 INTERVIEWS**

**100 employees
and more
2437 INTERVIEWS**

COMPANY SIZE SEGMENT DEFINITION

																				
	AT	BE	CH	DE	ES	FR	IT	LU	NL	PT	UK	CZ	PL	DK	FI	NO	SE	BR	RU	TR



SAMPLE STRUCTURE

In %

Company size & sector

Construction

Building Construction General Contractors And Operative Builders / Heavy Construction Other Than Building Construction Contractors / Construction Special Trade Contractors



15

15

11

8

13

Industry

Mining, oil & gas, Manufacturing (e.g. food, tobacco, textile, wood, furniture, printing, publishing, chemicals, fabricated metal products, electronic, machinery, etc...)

20

31

36

34

29

Services

Finance / transportation / Hotels, Rooming Houses, Camps, And Other Lodging Places / Personal Services / Business Services / Automotive Repair, Services, And Parking / Motion Pictures / Amusement And Recreation Services / Health Services / Legal Services / Social Services / Museums, Art Galleries, And Botanical And Zoological Gardens / Membership Organizations / Engineering, Accounting, Research, Management, And Related Services / Private Households

37

31

34

40

36

Trade

Building Materials, Hardware, Garden Supply, And Mobile Home Dealers / General Merchandise Stores Food Stores / Automotive Dealers And Gasoline Service Stations / Apparel And Accessory Stores / Home Furniture, Furnishings, And Equipment Stores / Eating And Drinking Places / Miscellaneous / Retail / Wholesale trade

27

23

20

18

23

Weight of each company size segment

33

20

27

20

TOTAL

This sample structure was set up in order to be roughly representative of the number of vehicles registered by companies for each company size segment and activity sector 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

2

EXECUTIVE SUMMARY



GLOBAL COUNTRY INSIGHT: IN MOST COUNTRIES, COMPANIES HAVE ACCELERATED THEIR TRANSITION TOWARDS NEW MOBILITY AND GREENER FLEETS.

#1

THE COVID-19 CRISIS HAS ACCELERATED THE DEVELOPMENT OF COMPANIES' MOBILITY OFFER.

#2

THE ADOPTION OF ALTERNATIVE ENERGIES IS GLOBALLY ACCELERATING.

#3

STRONG GROWTH PERSPECTIVES FOR OPERATING LEASING IN THE FUTURE.

INSIGHT 1: THE COVID-19 CRISIS HAS ACCELERATED THE DEVELOPMENT OF COMPANIES' MOBILITY OFFER.

#1

THE COVID-19 CRISIS HAS RESHAPED THE COMPANIES' MOBILITY OFFER

- **Despite the pandemic, companies are confident about the future and for the most part oversee an increase of their fleet in the next 3 years.**
 - **However, the COVID-19 has urged fleet managers to redesign (probably faster than expected) their mobility offer to face the new needs of safe transportation that have emerged this year for ALL employees (and not only the ones with corporate cars anymore).**
 - **Hence, the use of solutions like private lease/salary sacrifice (25%, +11pts) has significantly increased this year, as well as the mobility budget (29%, +15 pts), offering more flexibility. Corporate car sharing (28%, + 9 tps) is also progressing probably thanks to strict disinfection processes.**
- **But beyond the specific context, it is all the mobility offer that is currently questioned, as:**
 - **We also observe a growing interest for shared mobility solutions, such as ride sharing (58% ; +15 pts) and public transports (53% ; +9 pts).**
 - **On average, for those companies already using or considering implementing alternative solutions, half of fleet managers expect that their company car drivers would complement their company car benefit for such alternatives in the future!**

INSIGHT 2: **THE ADOPTION OF ALTERNATIVE ENERGIES IS GLOBALLY ACCELERATING.**

#2

ALTERNATIVE ENERGIES ADOPTION IS GLOBALLY ACCELERATING

- **Nowadays, fleet managers have to deal with 2 concerns: how to reach the budget balance while, at the same time, meeting their company's CSR commitments**
- **In that perspective, alternative fuel technologies (such as HEV, PHEV and BEV) are seen in most countries as a possible answer to these concerns (except in Luxembourg, Czech Republic and Russia).**
- **Regarding the budget balance:**
 - **Alternative energies help reducing fuel expenses.**
 - **They are more and more accessible in terms of price, range models and charging points.**
- **Regarding the CSR: it is highly expected that companies reduce their carbon footprint as more and more people now aim at supporting socially responsible & environmental-friendly brands (a trend that is reinforced with the COVID-19 crisis). In this context, zero emission cars are key to contribute to the corporate image.**
- **Therefore, 7 companies out of 10 already use hybrid or full electric technologies or intend to do so in the future. Overall, fleet managers even expect that BEV will account for 1/3 of their fleet in 3 years.**
- **Connected vehicles could also help reaching both objectives, as it contributes to reduce both the fleet costs (40%) and the environmental impact (33%).**

INSIGHT 3: **STRONG GROWTH PERSPECTIVES FOR OPERATING LEASING IN THE FUTURE.**

#3

HOW TO FINANCE THESE GREENER FLEETS?

- **Operating leasing has good perspectives of development in the near future: 6 companies out of 10 plan to develop operating leasing in the next 3 years (+22 pts).**

3

WHAT ARE THE MAIN CHARACTERISTICS OF THE FLEETS?



GROWTH PERSPECTIVES ARE EXPECTED, IN RESPONSE TO THE NEED TO PROVIDE SAFE INDIVIDUAL MEANS OF TRANSPORTATION.

1

- Overall, the corporate fleet size splits as follow:
 - Half of companies own 1 to 9 corporate vehicles.
 - A third own 10 to 99 corporate vehicles.
 - Only 1 out of 10 own more than 100 vehicles.

2

- All companies are confident about the future and for the most part oversee an increase of their fleet in the next 3 years: 45% anticipate an increase (+14 pts vs. last year(LY)), when only 8% predict a decrease.
An optimism that grows with the size of the company: growth potential is particularly high among the largest companies, less vulnerable to the economic impact of the crisis and more able to seize financial subsidies opportunities.

3

- Besides the anticipated growth of the activity that requires new vehicles, new needs have emerged along with the health context and force companies to reshape their fleet management:
 - Because they want to provide a safe commute to their employees (29%)...
 - ...which can also take form in shared vehicles provided by the company (19%, +5 pts vs. LY), reassuring with a strict cleaning process between each driver
 - Finally, they redesign their car policy terms to widen the eligibility among their employees (19%, +5 pts vs. LY).

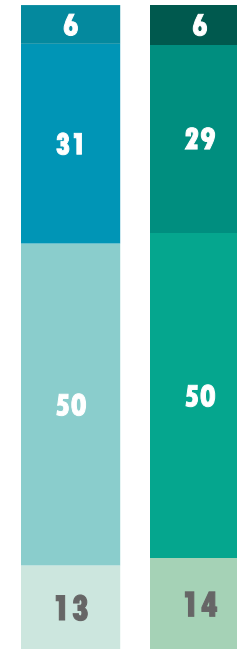
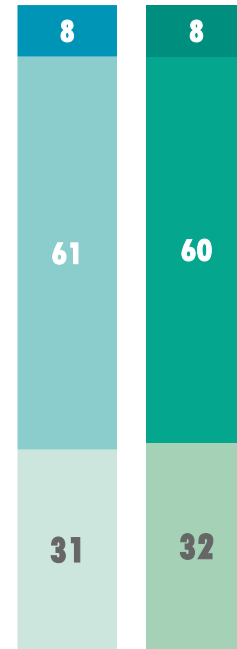
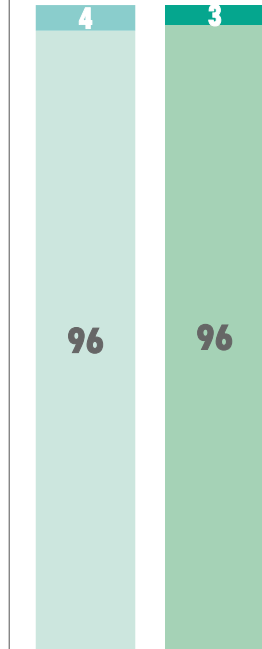
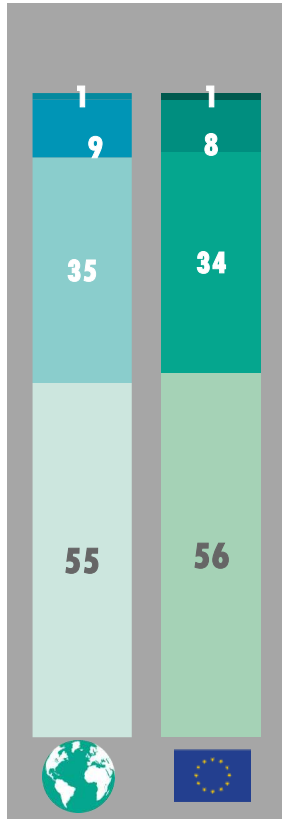
NUMBER OF VEHICLES IN FLEET

In %



Passenger cars + LCVs

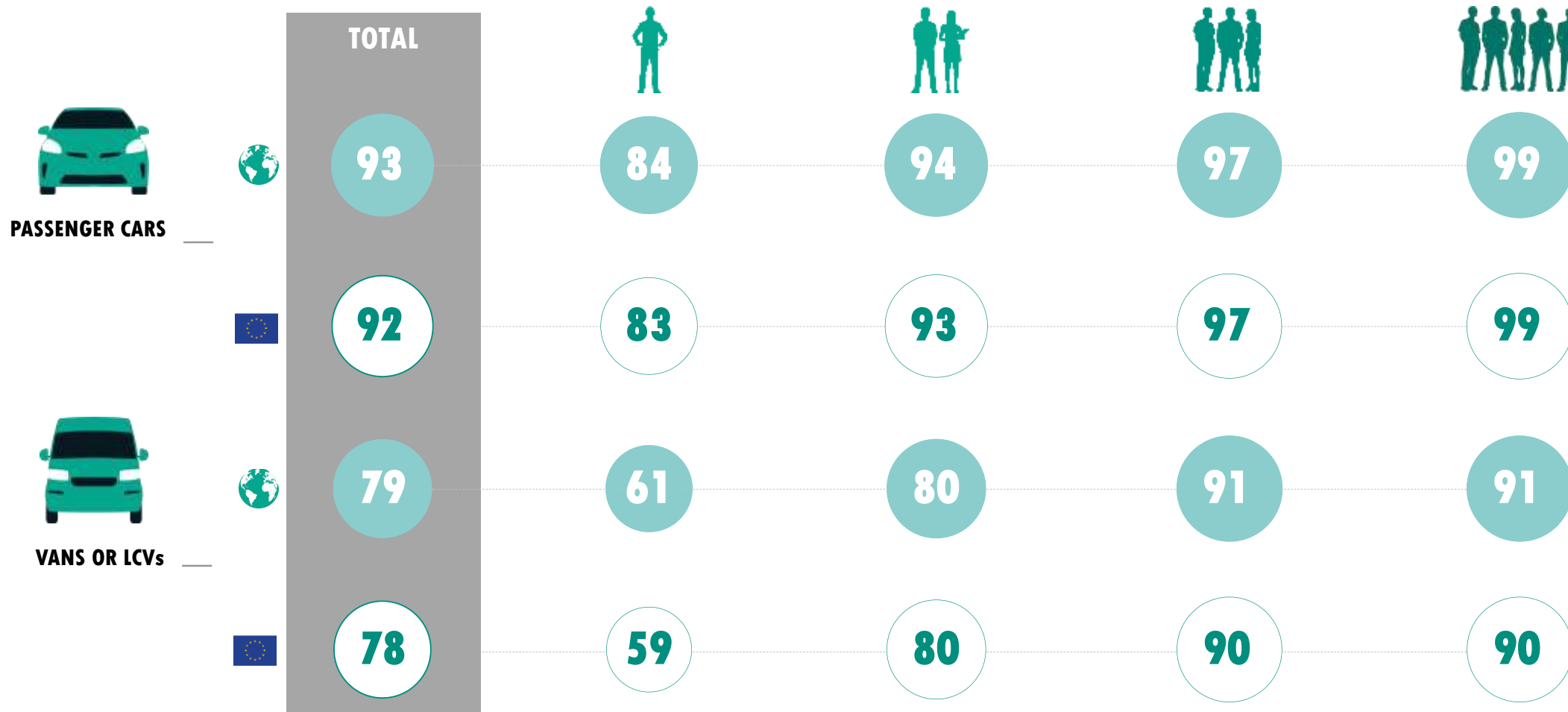
- 1000 vehicles and more
- 100 to 999 vehicles
- 10 to 99 vehicles
- 1 to 9 vehicles



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

(among companies with at least one vehicle in fleet)

In %



Basis: companies with corporate vehicles = 100%

NUMBER OF VEHICLES IN FLEET

Focus on 1 to 99

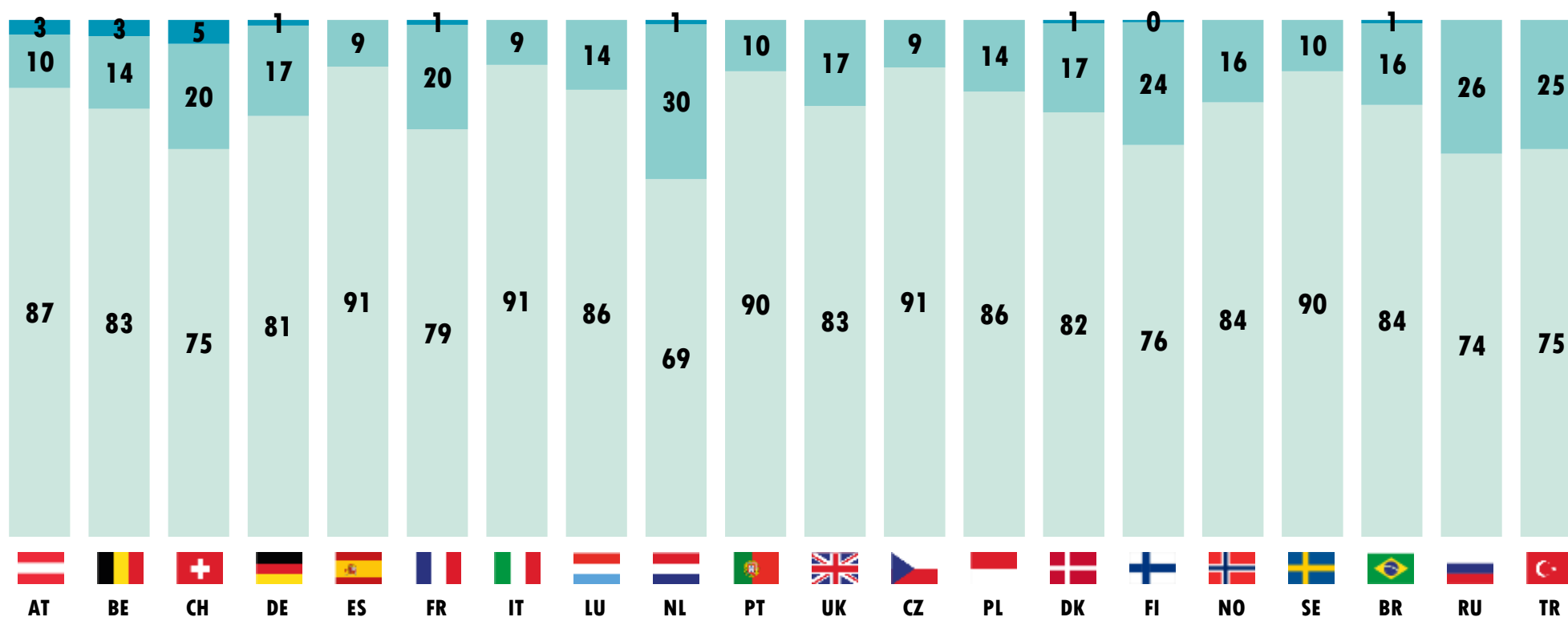
In %



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%

NUMBER OF VEHICLES IN FLEET

Focus on 100 and more

In %



Passenger cars + LCVs

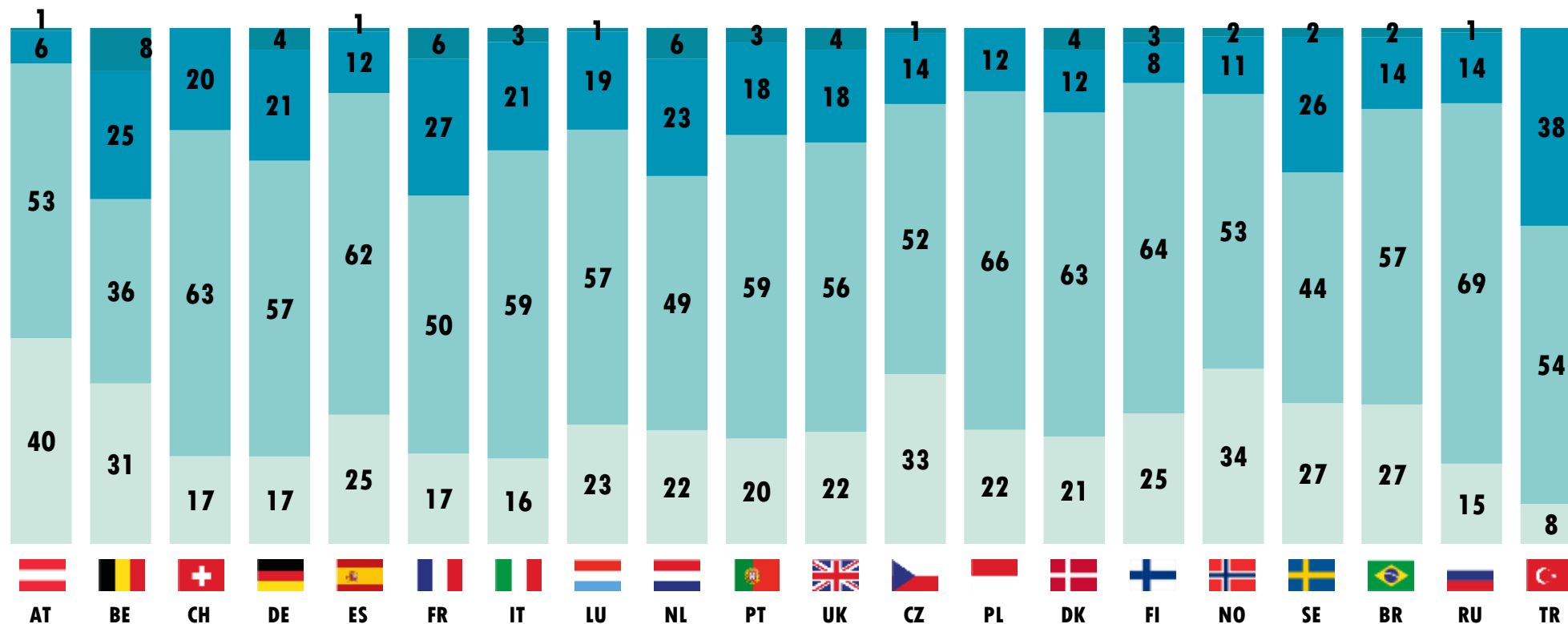


1000 vehicles and more

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?
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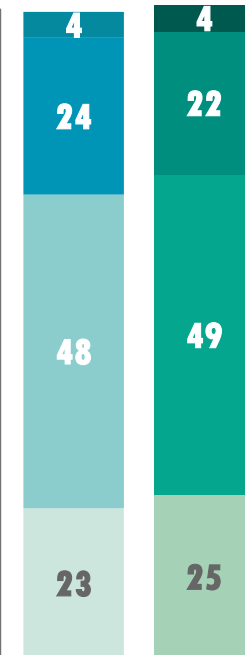
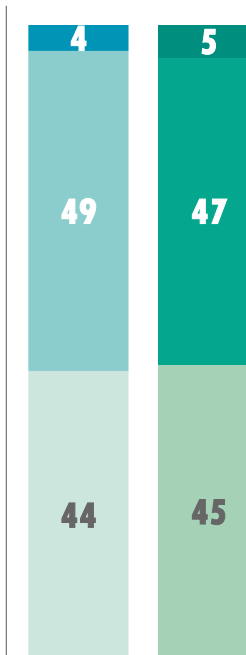
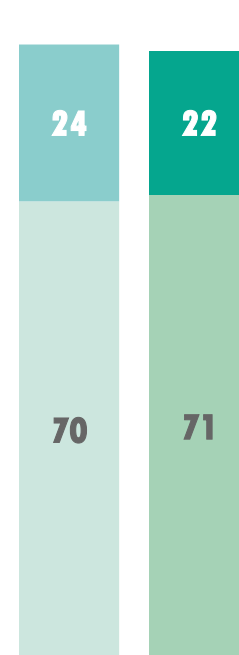
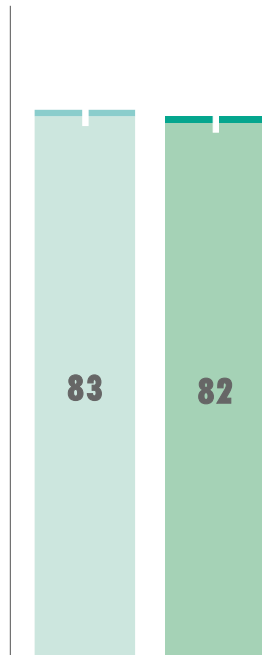
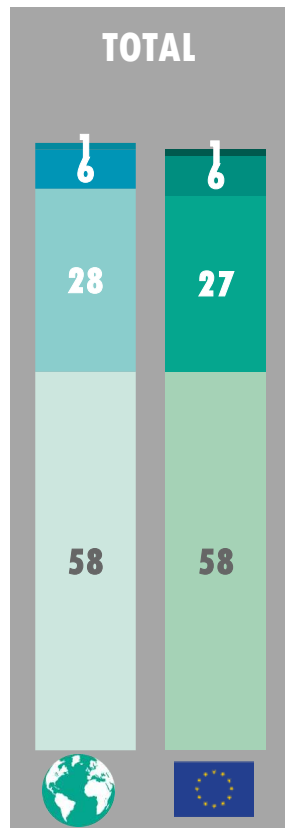
NUMBER OF PASSENGER CARS IN FLEET

In %



Passenger cars

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



NUMBER OF PASSENGER CARS IN FLEET

Focus on 1 to 99

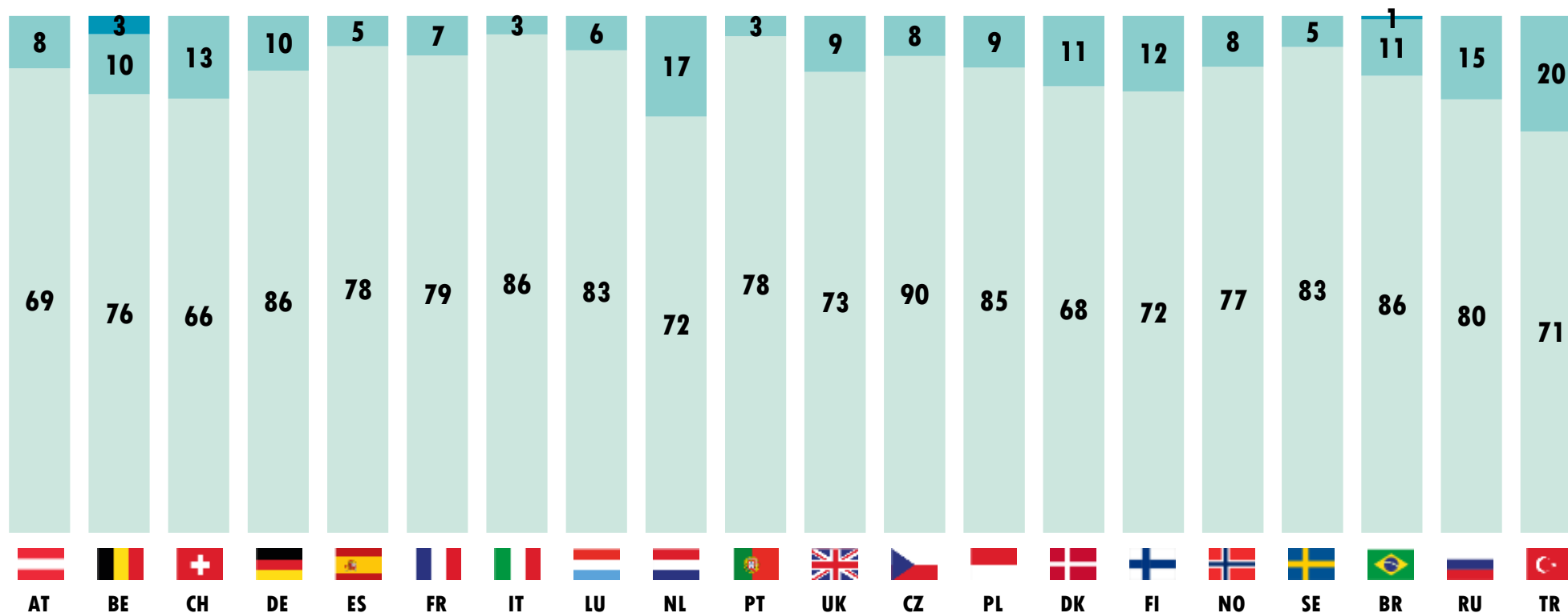
In %



Passenger cars



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



NUMBER OF PASSENGER CARS IN FLEET

Focus on 100 and more

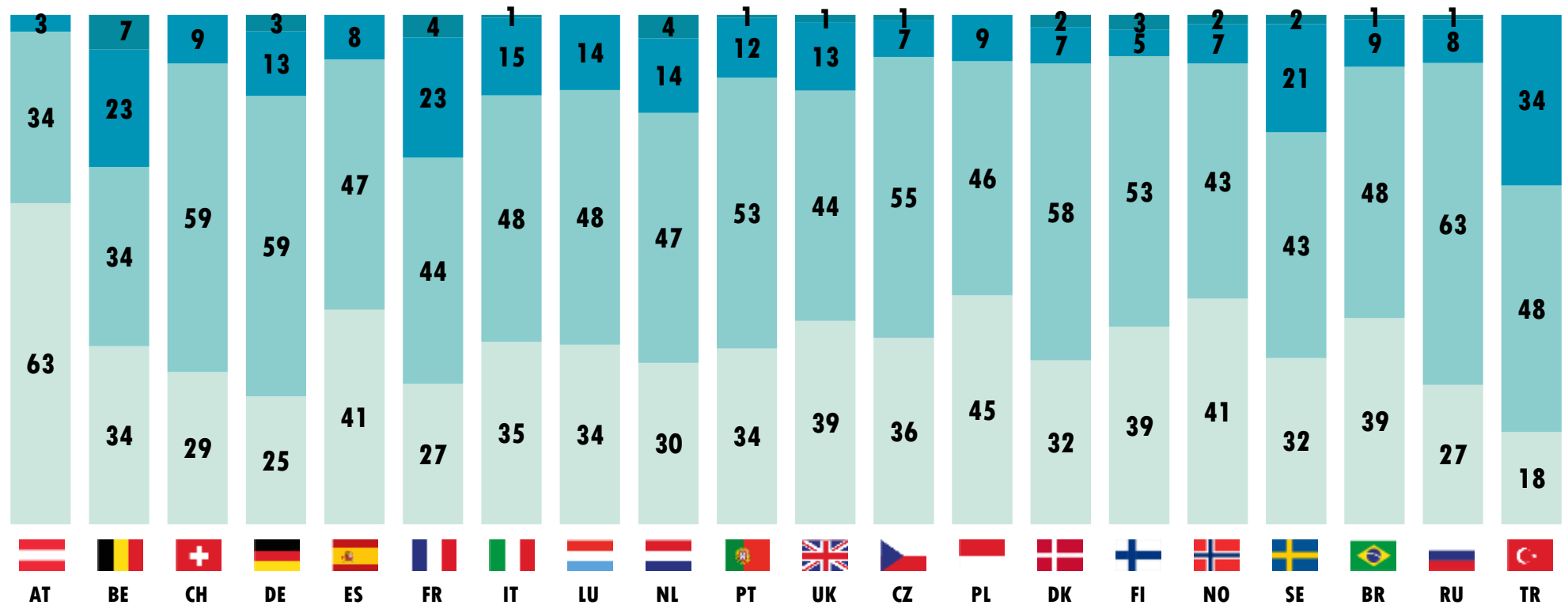
In %



Passenger cars



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



NUMBER OF LCVS IN FLEET

In %



LCVs

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



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

NUMBER OF LCVS IN FLEET

Focus on 1 to 99

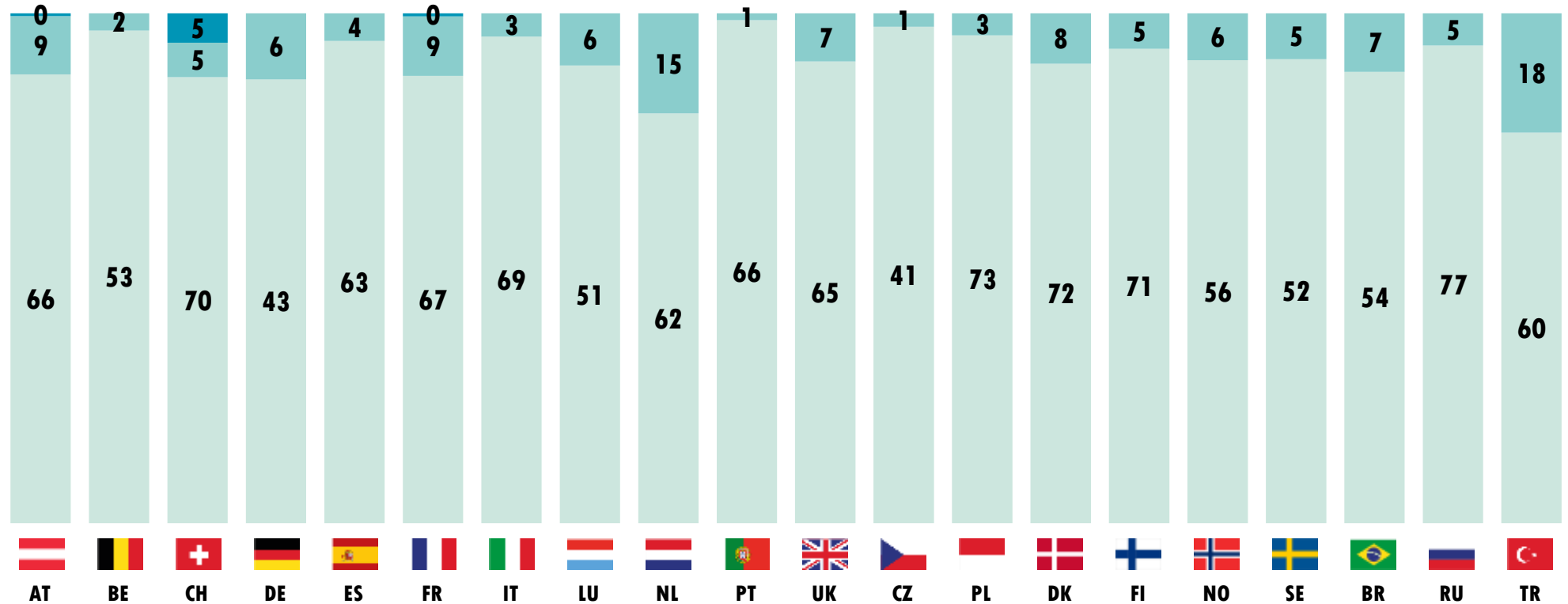
In %



LCVs



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



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

NUMBER OF LCVS IN FLEET

Focus on 100 and more

In %



LCVs

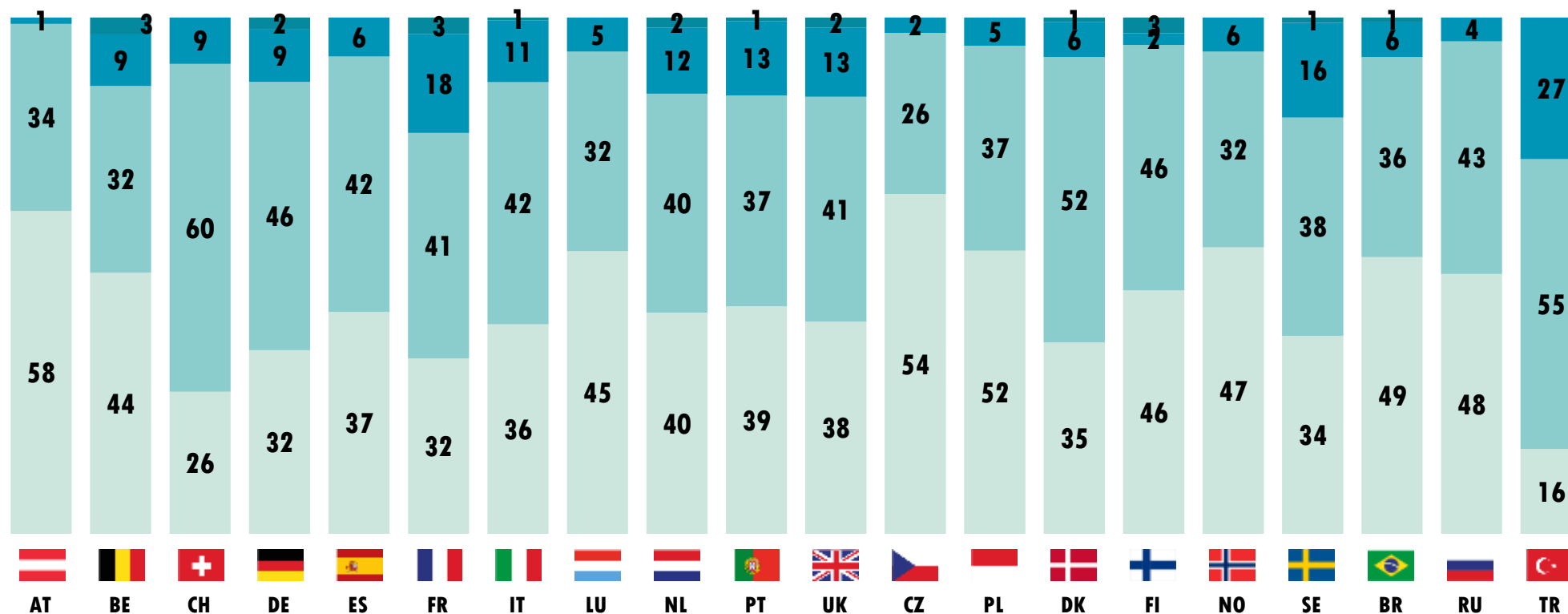


1000 vehicles and more

100 to 999 vehicles

10 to 99 vehicles

1 to 9 vehicles

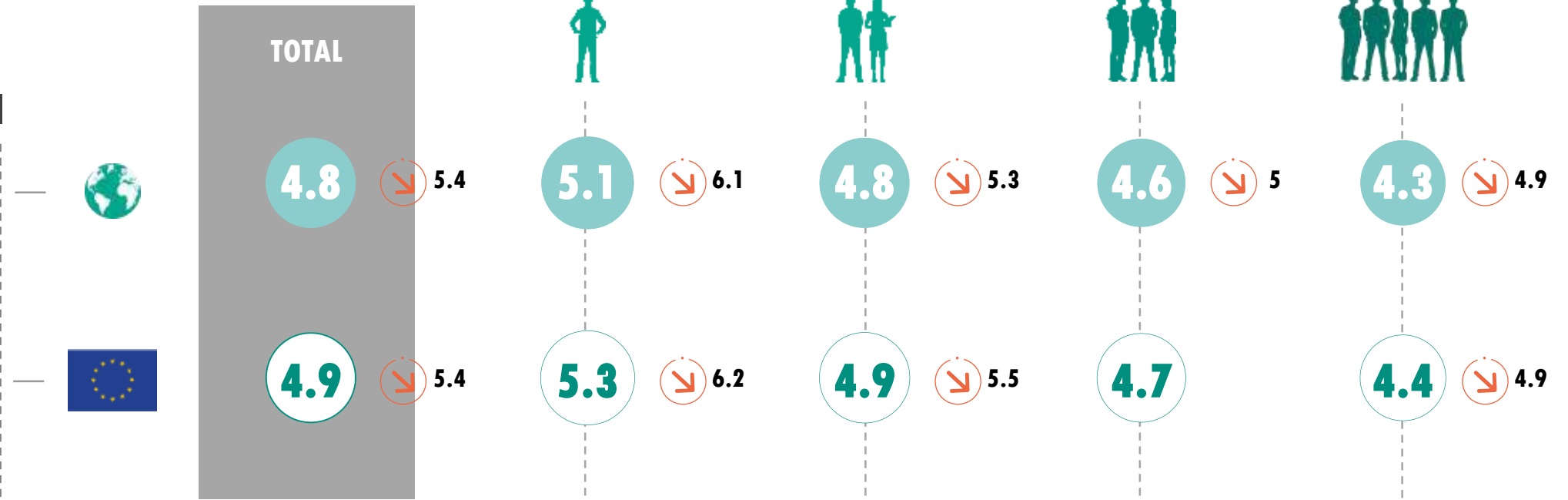


And can you please tell us the total number of LCVs or vans in your fleet?
Basis: companies with corporate vehicles = 100%

VEHICLES POSSESSION LENGTH



AVERAGE IN YEARS

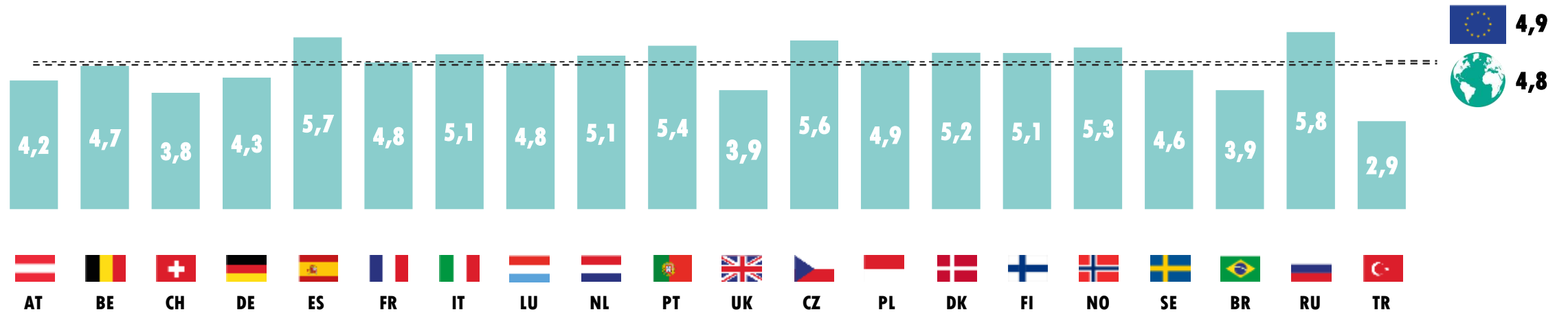


*On average, how long do you keep your vehicles (before being sold or giving back to the leasing company)?
Basis: companies with corporate vehicles = 100%*

VEHICLE POSSESSION LENGTH



Passenger cars + LCVs



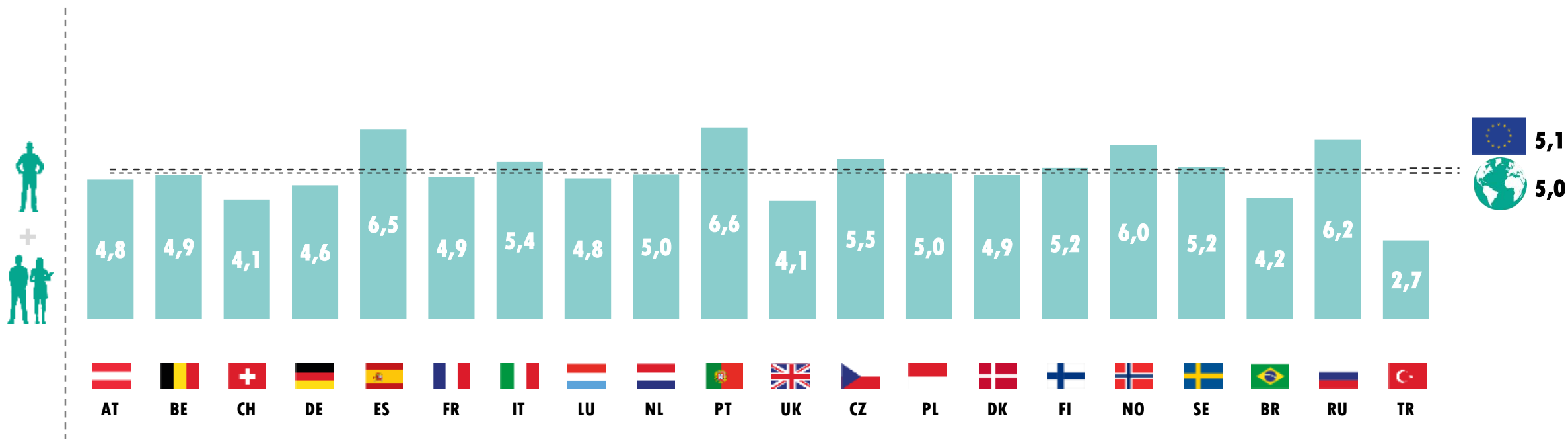
*On average, how long do you keep your vehicles (before being sold or giving back to the leasing company)?
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VEHICLE POSSESSION LENGTH

Focus on 1 to 99



Passenger cars + LCVs



*On average, how long do you keep your vehicles (before being sold or giving back to the leasing company)?
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VEHICLE POSSESSION LENGTH

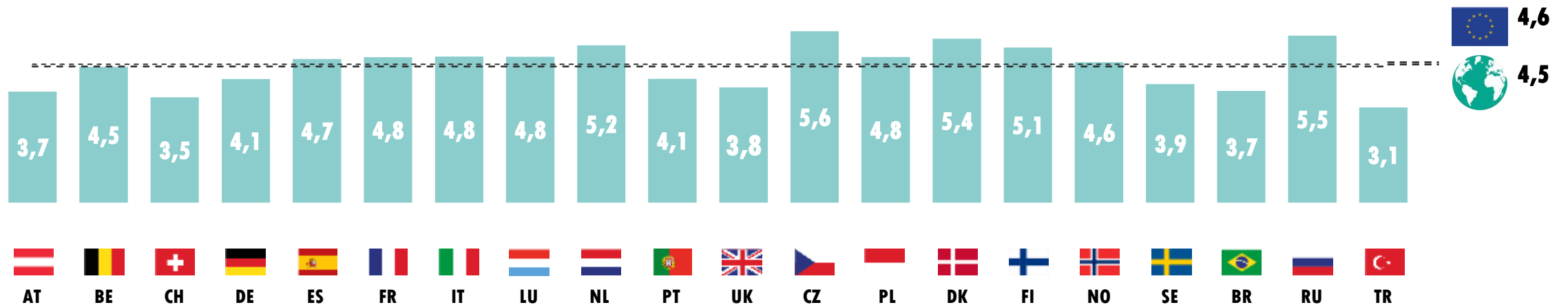
Focus on 100 and more



Passenger cars + LCVs



+



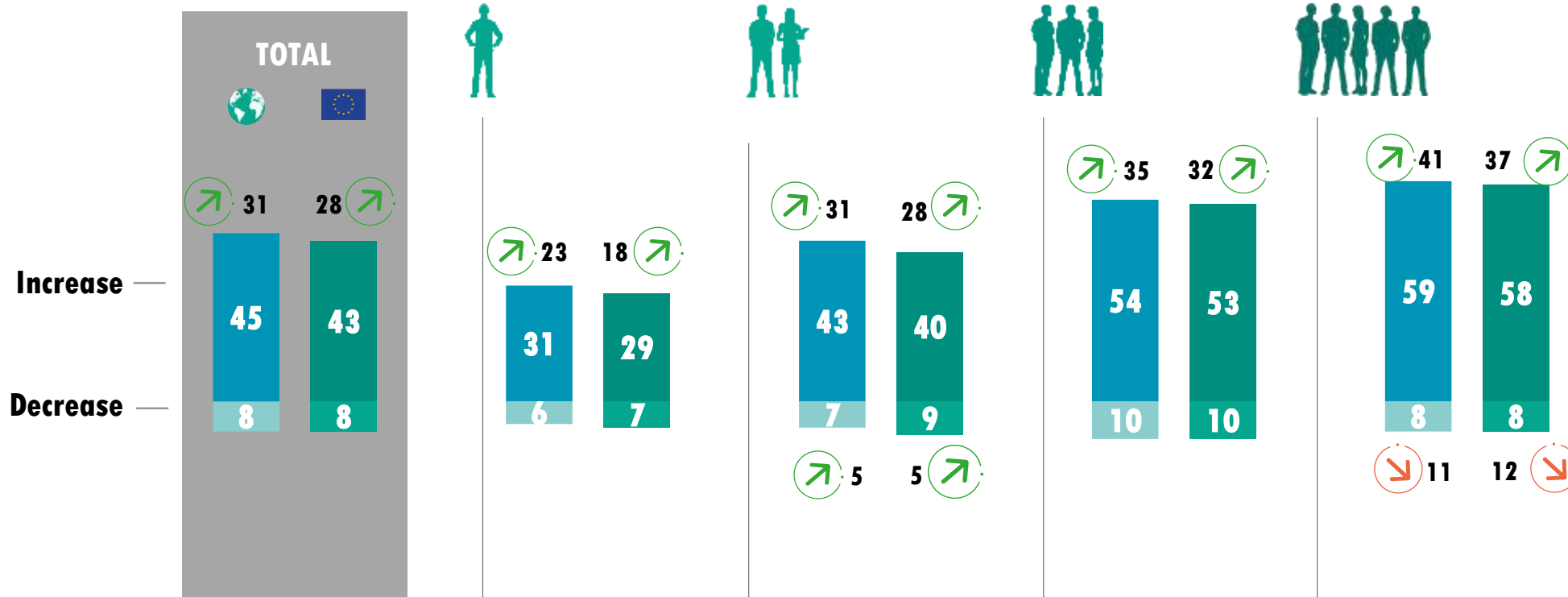
*On average, how long do you keep your vehicles (before being sold or giving back to the leasing company)?
Basis: companies with corporate vehicles = 100%*

FLEET GROWTH POTENTIAL

In %



Passenger cars + LCVs



BALANCE in pts (INCREASE ⊖ DECREASE)



2021	+37	+35	+25	+22	+36	+31	+44	+43	+52	+50
2020	+24	+20	+17	+12	+26	+23	+27	+24	+30	+25

*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

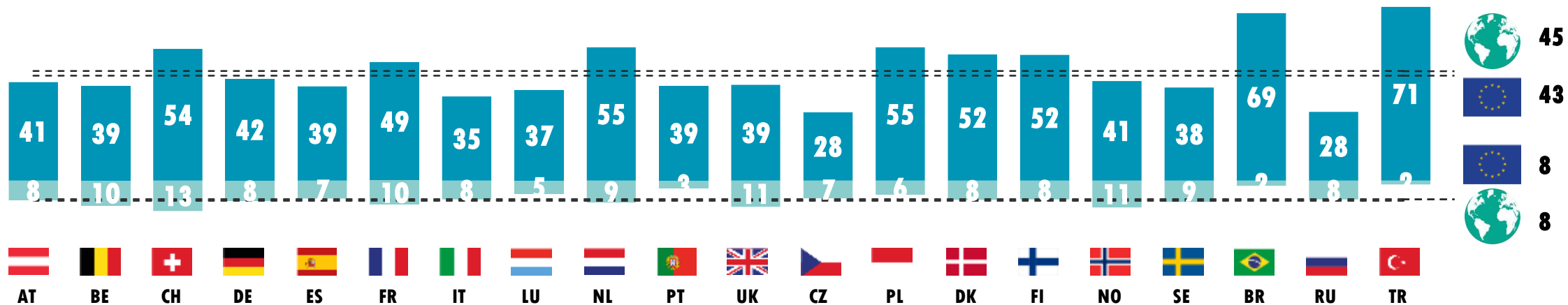
In %



Passenger cars + LCVs

Increase

Decrease



	AT	BE	CH	DE	ES	FR	IT	LU	NL	PT	UK	CZ	PL	DK	FI	NO	SE	BR	RU	TR	World	EU
2021	+32	+29	+42	+34	+31	+39	+27	+32	+46	+36	+29	+21	+49	+44	+44	+30	+30	+67	+20	+70	+37	+35
2020	+19	+26	+15	+12	+26	+14	+27	+30	+24	+25	+21	+18	+25	+12	+16	+16	+8	+64	+38	+43	+24	+20

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%

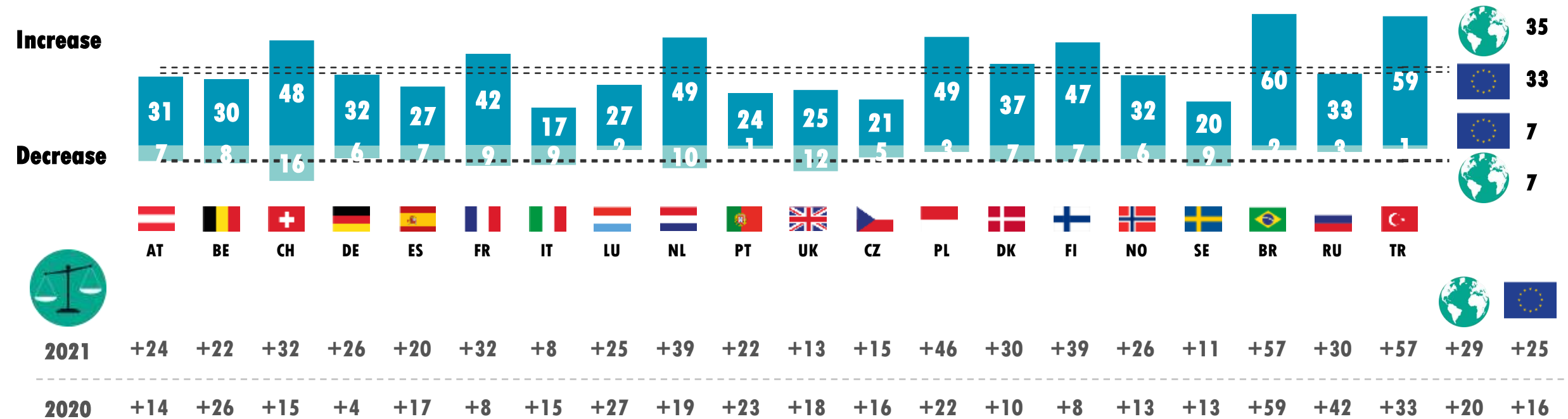
FLEET GROWTH POTENTIAL

Focus on 1 to 99

In %



Passenger cars + LCVs



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?
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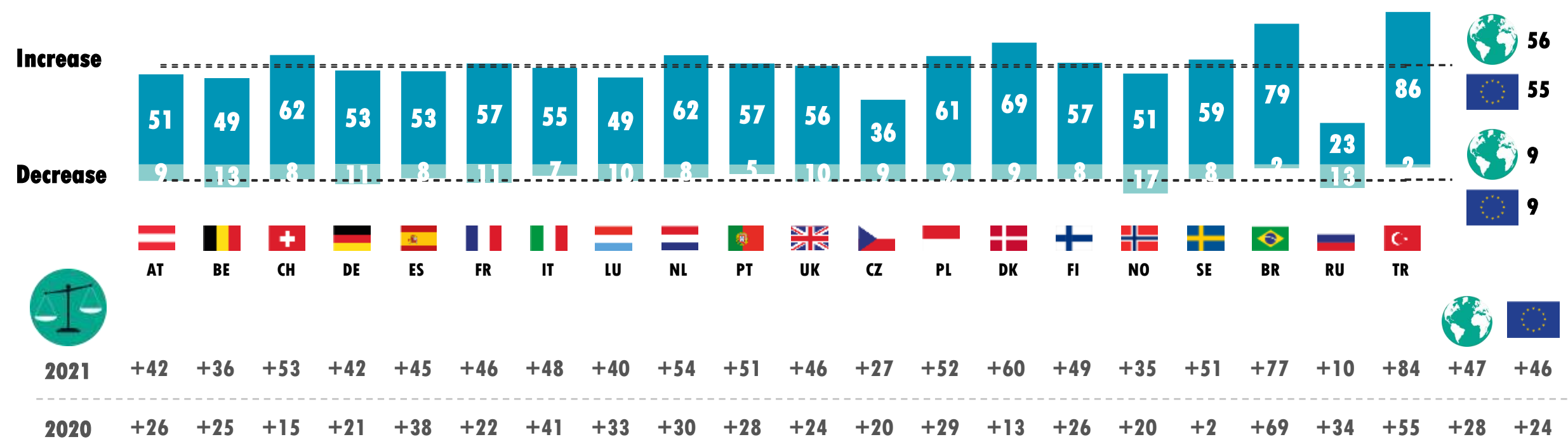
FLEET GROWTH POTENTIAL

Focus on 100 and more

In %



Passenger cars + LCVs



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

REASONS FOR FLEET FUTURE INCREASE

In %



Passenger cars + LCVs



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

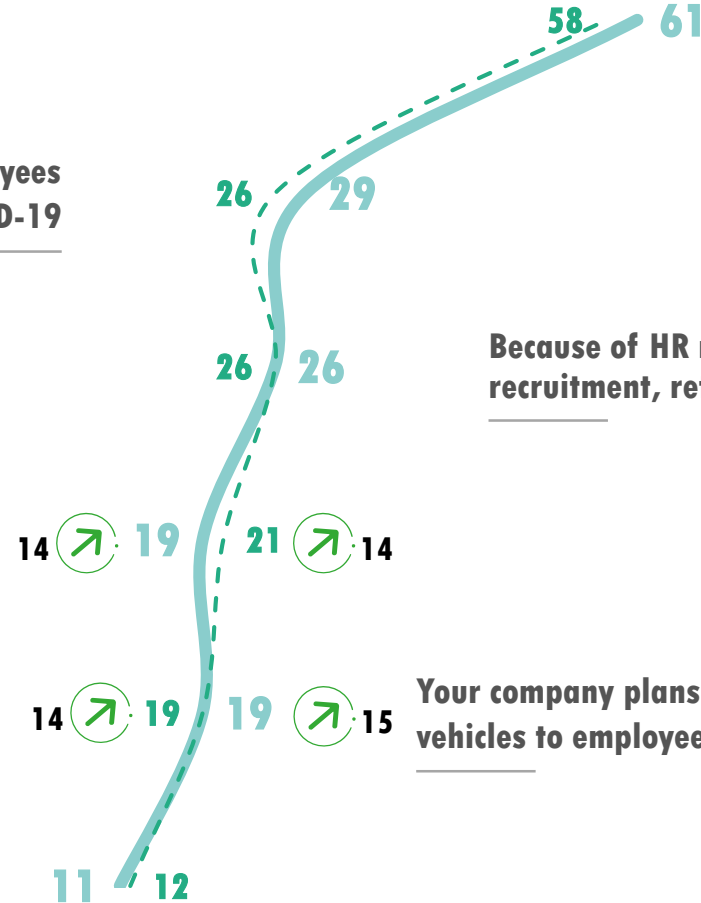
To provide a safe commute to your employees due to COVID-19

Your company plans to propose vehicles to employees with no company car eligibility

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

Your company plans to propose shared vehicles to employees

Because of tax decreases



*This item has changed, no comparison vs previous year

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

REASONS FOR FLEET FUTURE INCREASE

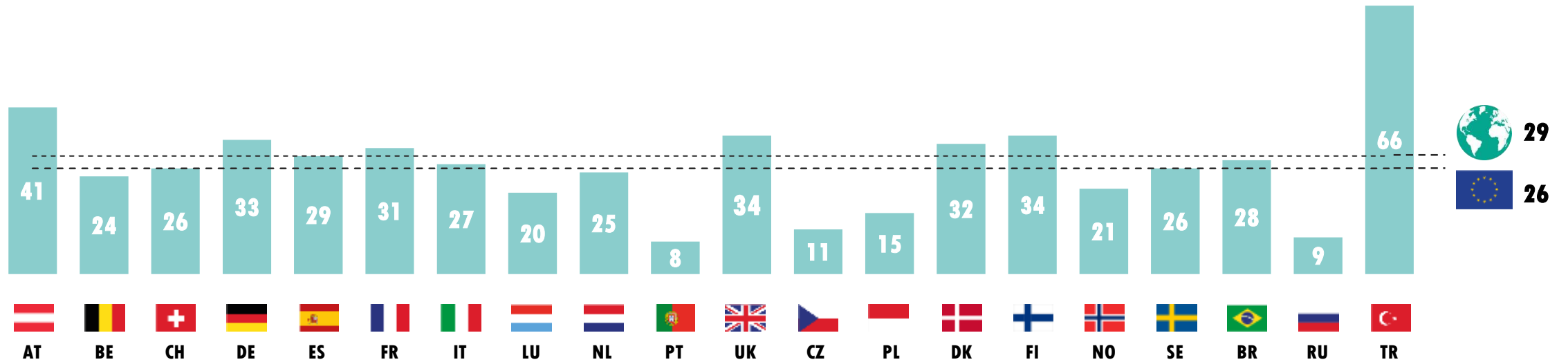
Focus on « **To provide a safe commute to your employees due to COVID-19** »

In %



Passenger cars + LCVs

% OF MENTIONS FOR “TO PROVIDE A SAFE COMMUTE TO YOUR EMPLOYEES DUE TO COVID-19” AS A REASON FOR THE FLEET FUTURE INCREASE



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

REASONS FOR FLEET FUTURE DECREASE

In %



Passenger cars + LCVs



COVID-19 impact

47 47

Your business is declining

29 31

Less employees will have access to company cars

33 ↘ 22 22 ↘ 32

Because you plan to increase home office working

12 ↗ 20 21 ↗ 13

Drivers are choosing cash allowance

15 16

Because of the introduction or development of alternative mobility solutions

24 ↘ 15 16 ↘ 23

Because of tax increases

12 14

Because of CSR policy

22 ↘ 12 12 ↘ 21

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

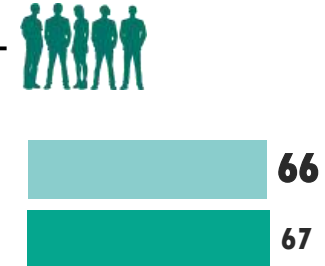
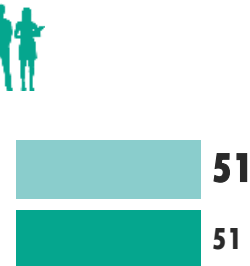
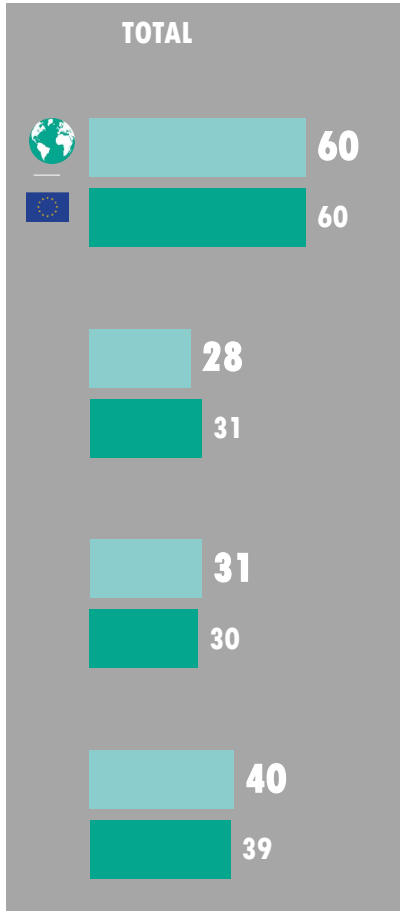
IMPACT OF THE COVID-19 CRISIS ON THE FLEET SIZE

In %



Passenger cars + LCVs

TOTAL YES



Yes, totally linked to the COVID-19 crisis

Yes, partially linked to the COVID-19 crisis

No, it is more a general tendency in our company

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

4

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



THE ADOPTION OF ALTERNATIVE ENERGIES IS GLOBALLY ACCELERATING, MOTIVATED BY OPPORTUNITIES OF SAVINGS AND CORPORATE IMAGE BENEFITS.

1

- **Alternative energies tend to soar this year and have become part of most countries' energy mix strategy: in average, 70% have already or consider implementing either Plug-in Hybrid, Hybrid or Battery Electric vehicles in their fleet and 39% have already implemented one.**

However, their adoption differs locally:

- **France, Netherlands, Finland and Denmark appear as leaders on this field, with more than half of the companies which have already implemented at least one of these 3 energies, and where 8 out of 10 intend to do it in the future.**
- **On the contrary, in Luxembourg and Czech Republic fewer companies are currently equipped (less than 30%) and the energy transition doesn't seem to be a priority for the near future either, especially in CZ where the total consideration barely reaches 46%.**
- **Russia is a very specific case: since around 16% of its GDP is coming from oil, natural gas, and precious metals, attractiveness for alternative fuel technologies remains very low (only 18% of companies plan to have at least one technology in place within 3 years).**

2

- **If very large companies are clearly leading the way for further alternative energies adoption, with intentions exceeding 70% for all 3 energies, the rest of the market is also following up. Equipment and intentions are increasing for PHEV, HEV and BEV regardless of the company size and the type of vehicles (passenger cars or LCV).**

3

- **Apart from environmental considerations, this development of alternative technologies mainly relies on:**
 - **Opportunities of savings (reduced fuel expenses, combined with tax incentives in some countries)**
 - **Companies' corporate image issues & CSR policy compliance**
 - **Future restrictive public policies (mostly in countries currently leading the implementation of such alternatives)**

4

- **In parallel, BEV usage progresses thanks to lower barriers than last year notably regarding charging points, price and range of models. Overall, companies estimate that BEVs will account for one third of their fleet in 3 years (with the same disparities among countries).**

CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

At least one technology (Plug-in Hybrid, Hybrid or 100% Battery Electric Vehicles)

In %



Passenger cars + LCVs



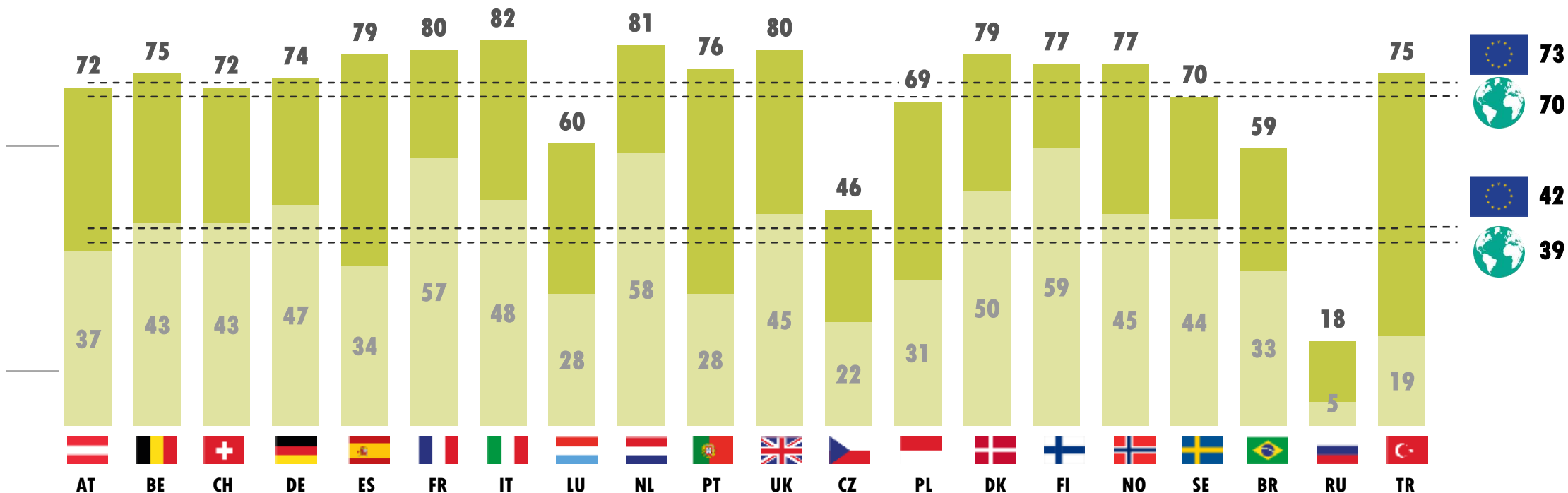
ALREADY
IMPLEMENTED OR
CONSIDER NEXT 3
YEARS



ALREADY
IMPLEMENTED

HOW TO READ THE RESULTS?

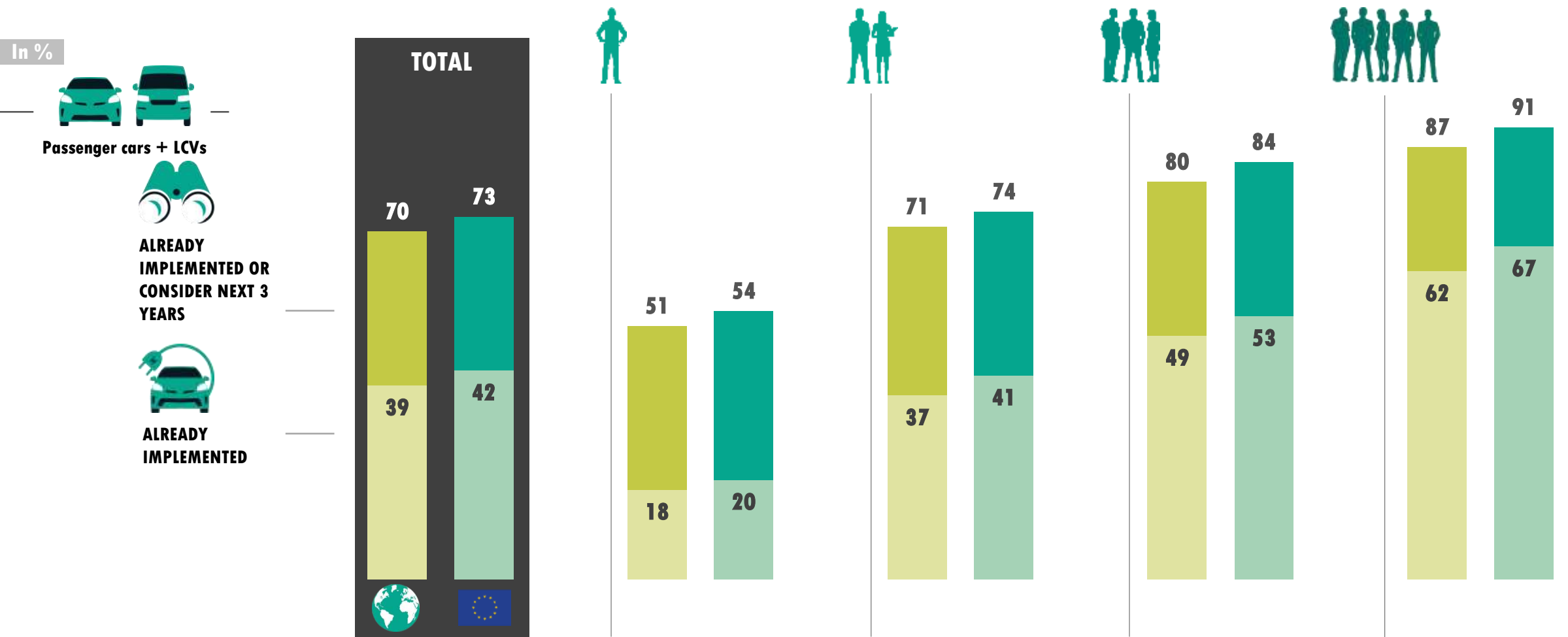
In France, 80% of the companies have already implemented or consider to implement at least one alternative technology in the next 3 years. 57% have already implemented at least one.



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

CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

At least one technology (Plug-in Hybrid, Hybrid or 100% Battery Electric Vehicles)



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

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Passenger car fleet

In %



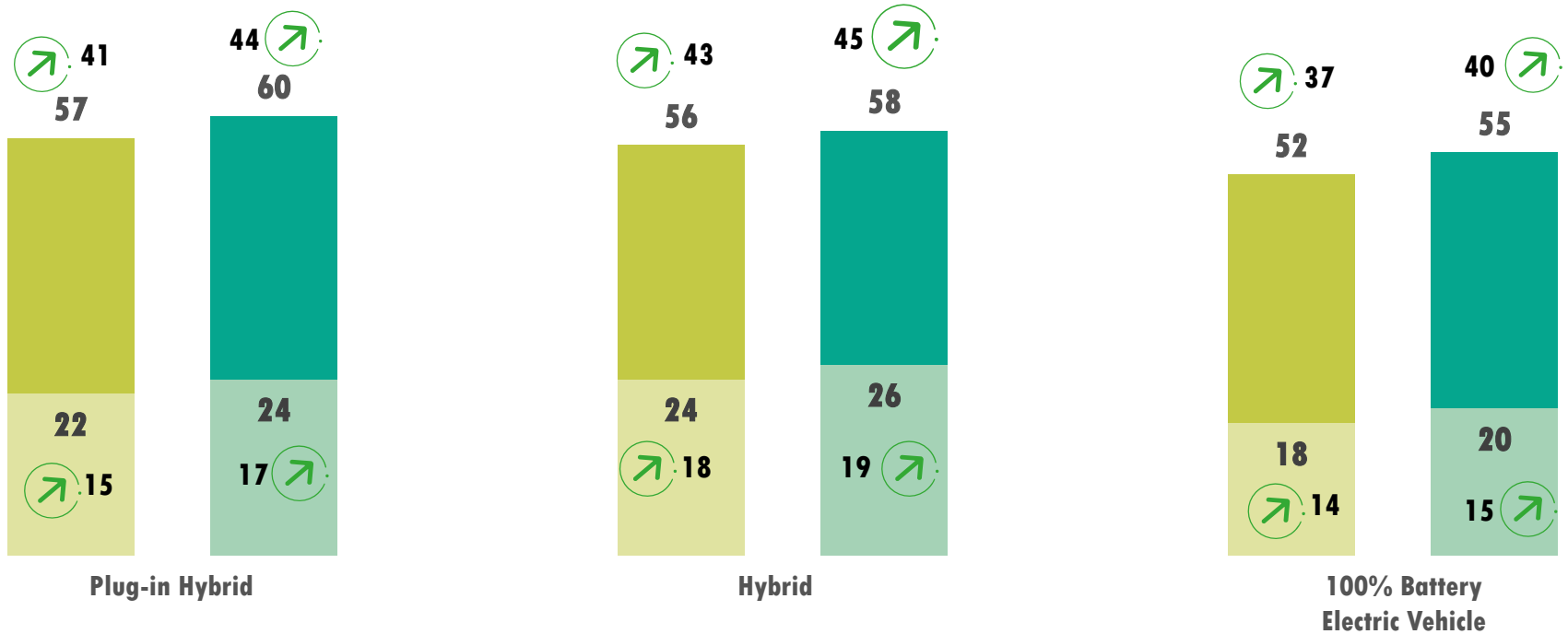
Passenger cars



ALREADY
IMPLEMENTED OR
CONSIDER NEXT 3
YEARS



ALREADY
IMPLEMENTED



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

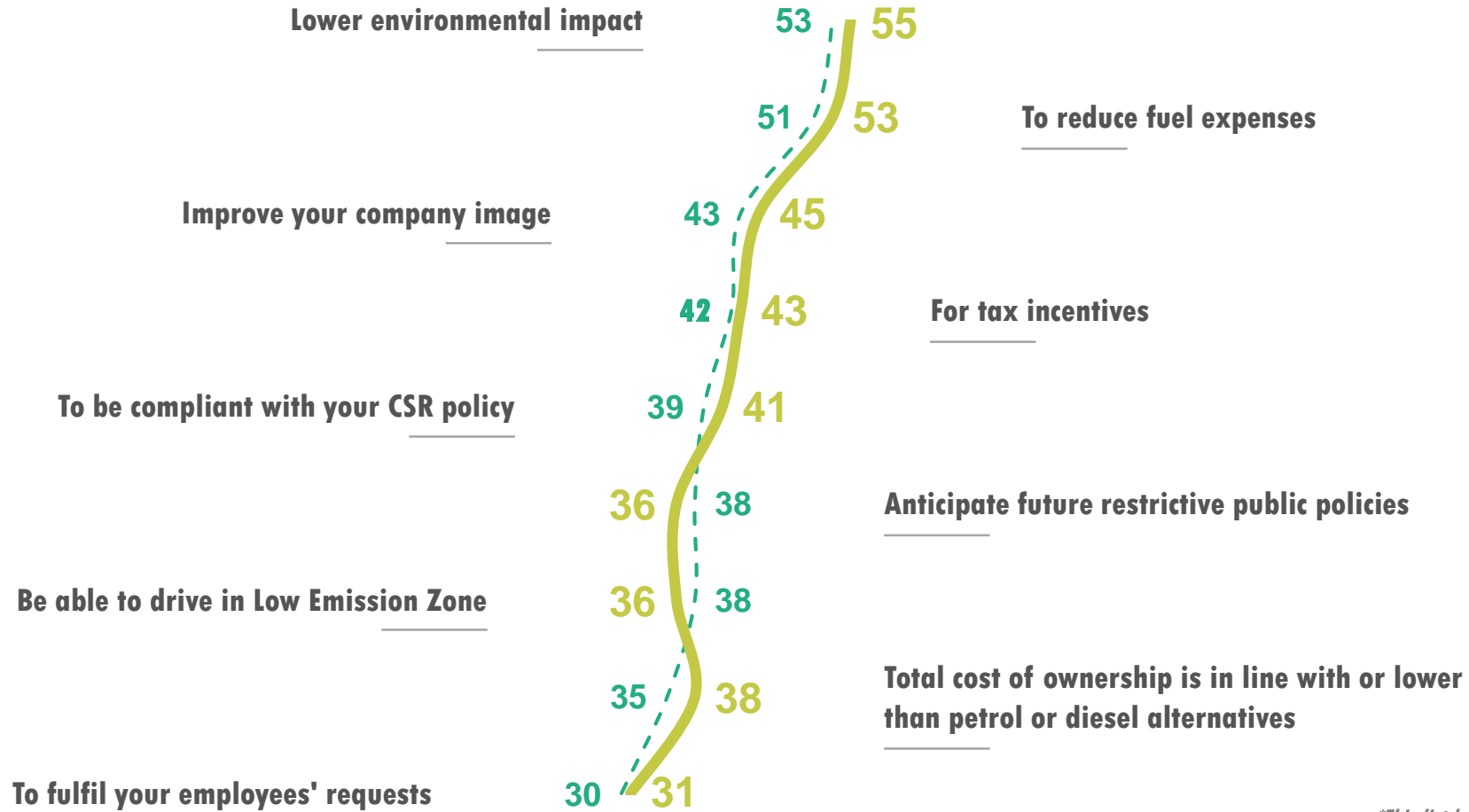
REASONS FOR IMPLEMENTING OR CONSIDERING ALTERNATIVE FUEL TECHNOLOGIES

Passenger car fleet

In %



Passenger cars



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

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

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

LCV Fleet

In %



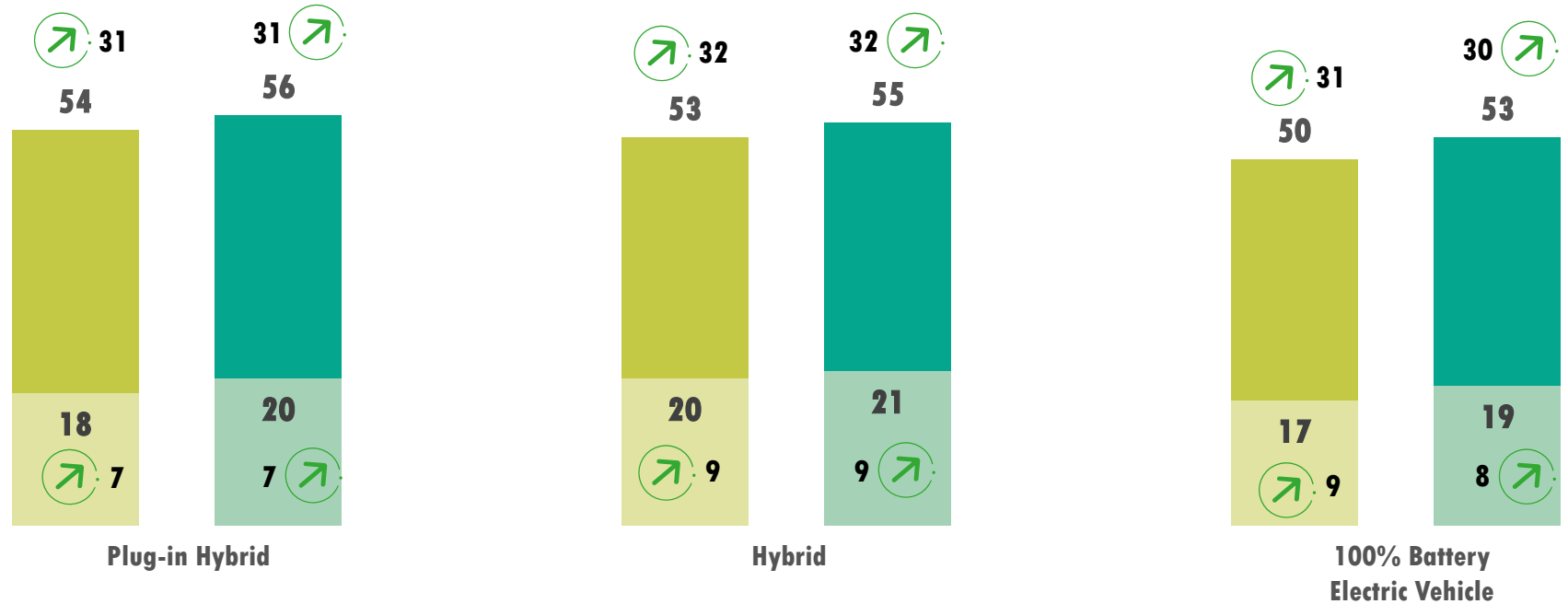
LCVs



ALREADY
IMPLEMENTED OR
CONSIDER NEXT 3
YEARS



ALREADY
IMPLEMENTED



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

REASONS FOR IMPLEMENTING OR CONSIDERING ALTERNATIVE FUEL TECHNOLOGIES

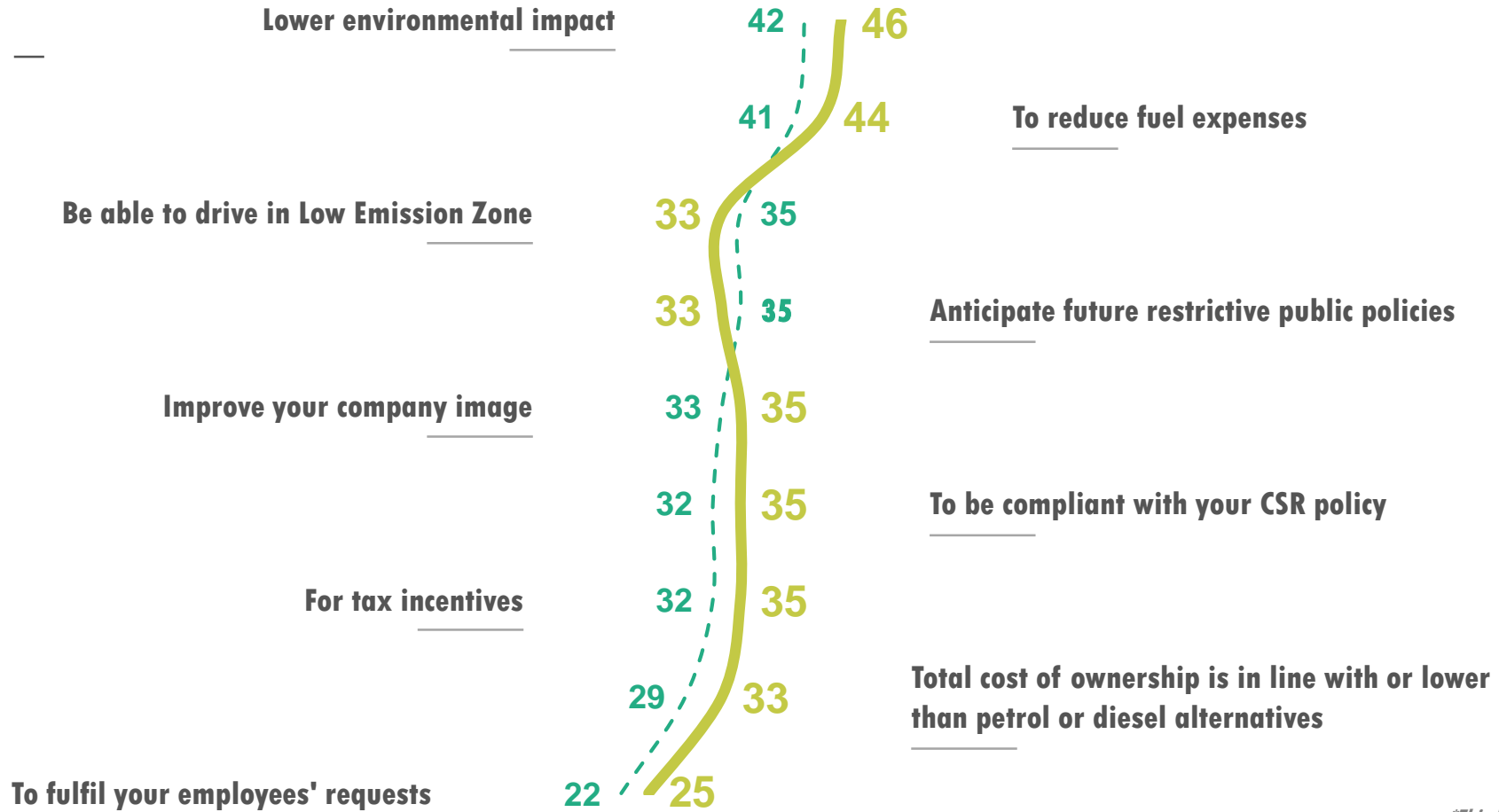
LCV fleet



In %



LCVs



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

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

4

ENERGY MIX FOCUS PER ALTERNATIVE TECHNOLOGY



HYBRID IMPLEMENTATION

In %



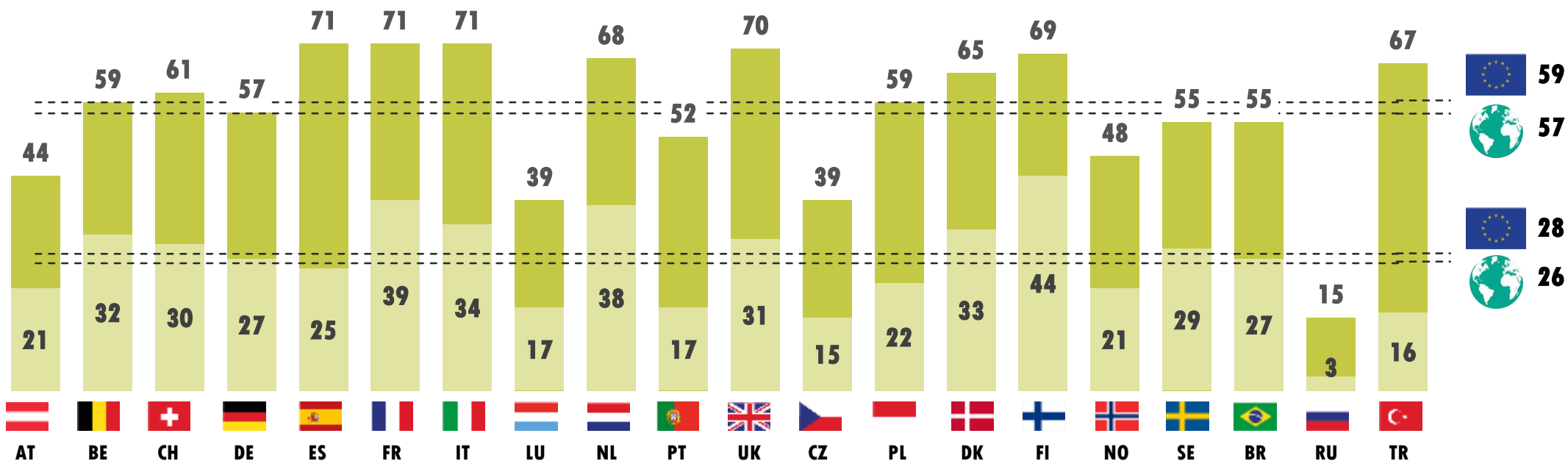
Passenger cars + LCVs



ALREADY
IMPLEMENTED OR
CONSIDER NEXT 3
YEARS

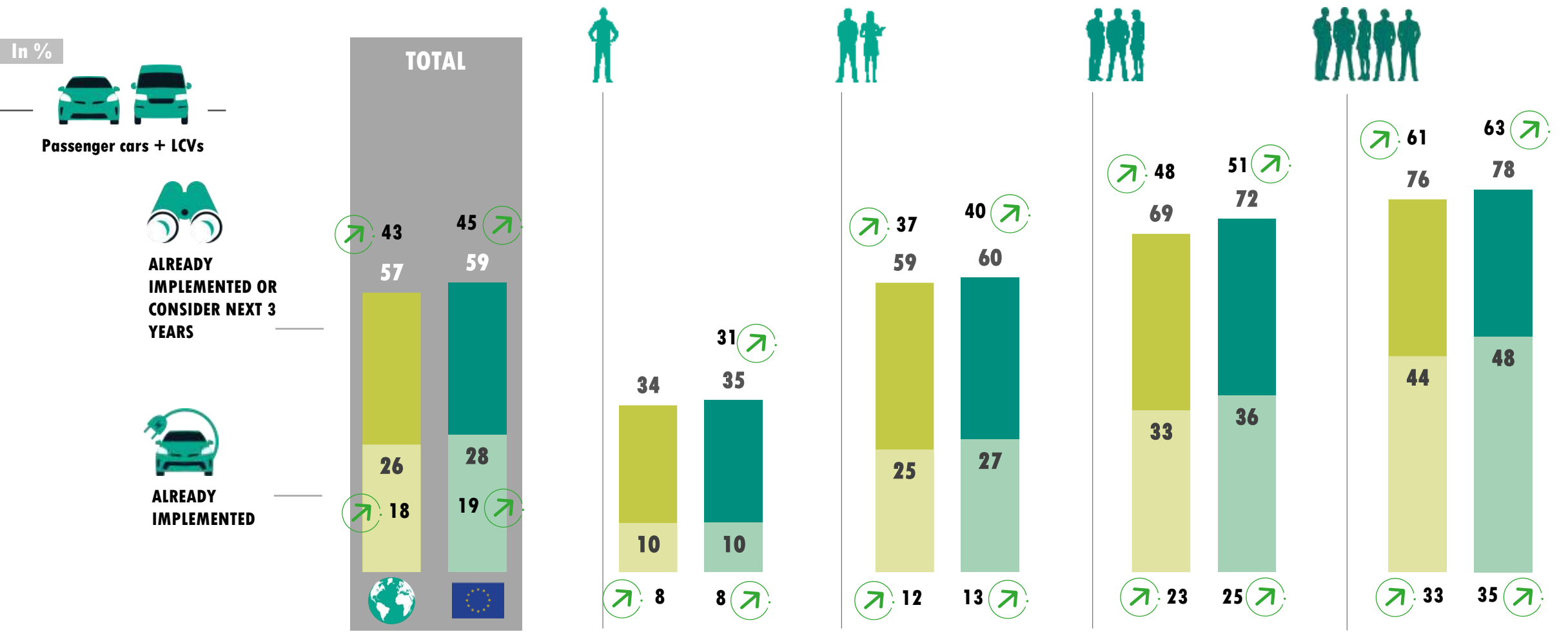


ALREADY
IMPLEMENTED



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

HYBRID IMPLEMENTATION



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

PLUG-IN HYBRID IMPLEMENTATION

In %



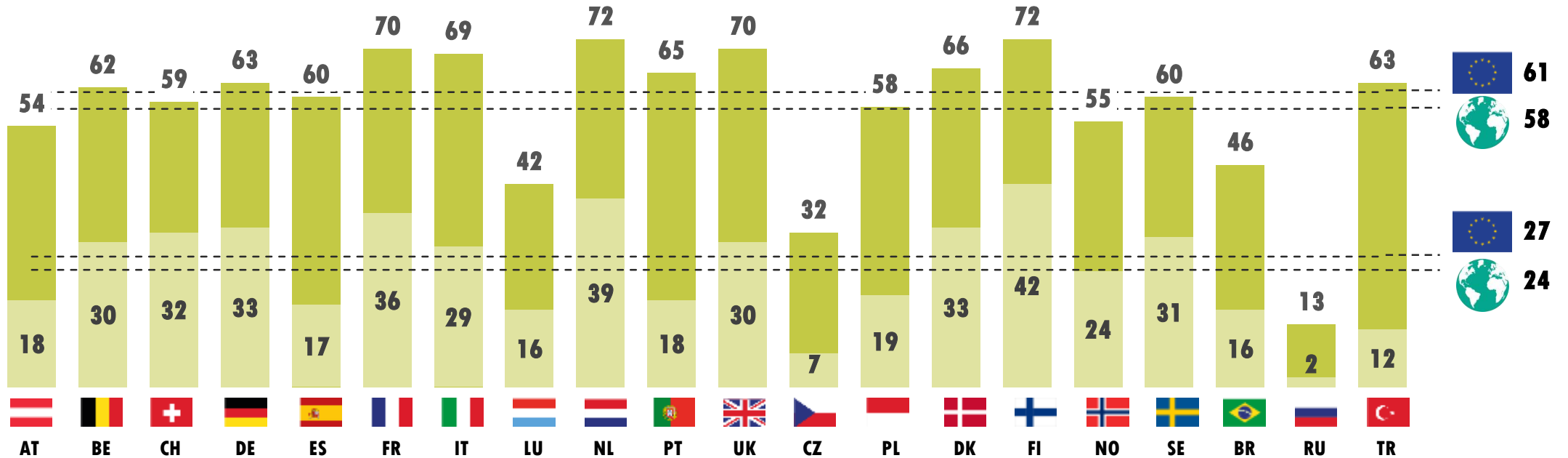
Passenger cars + LCVs



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS

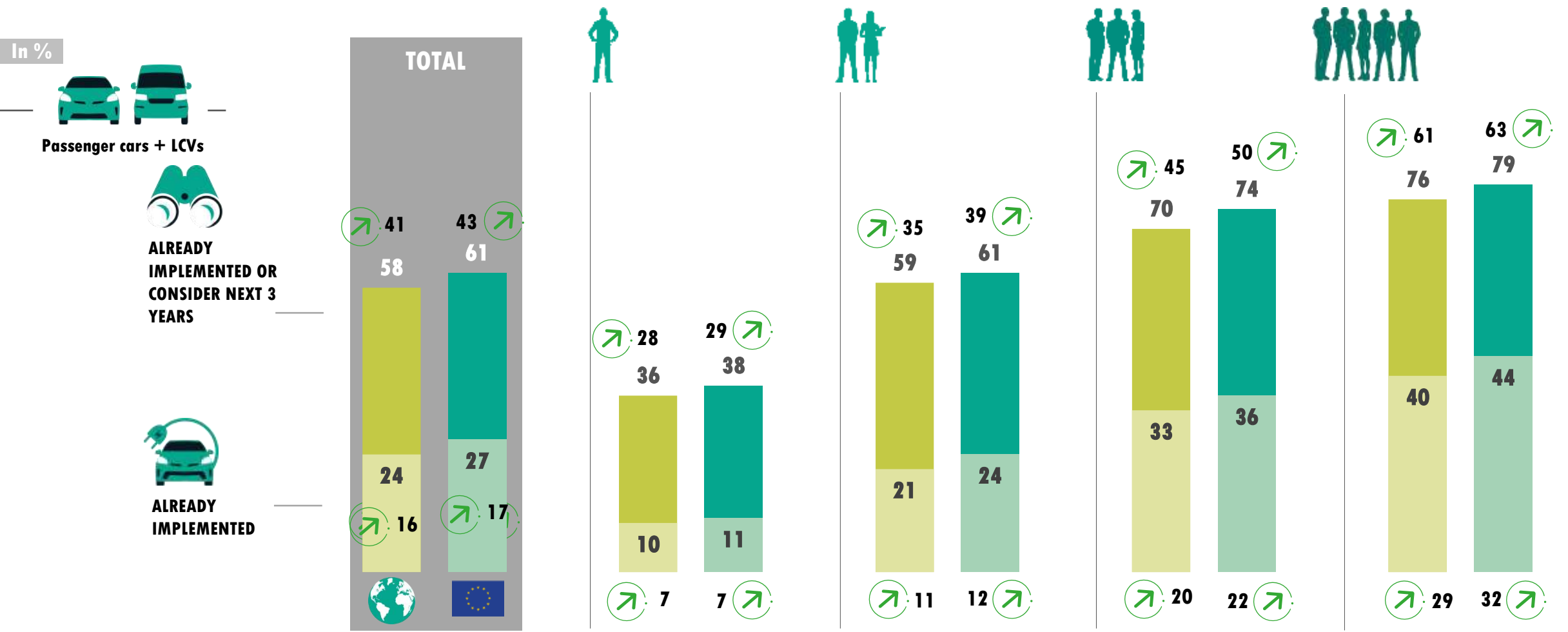


ALREADY IMPLEMENTED



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

PLUG-IN HYBRID IMPLEMENTATION



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

100% BATTERY ELECTRIC VEHICLE IMPLEMENTATION

In %



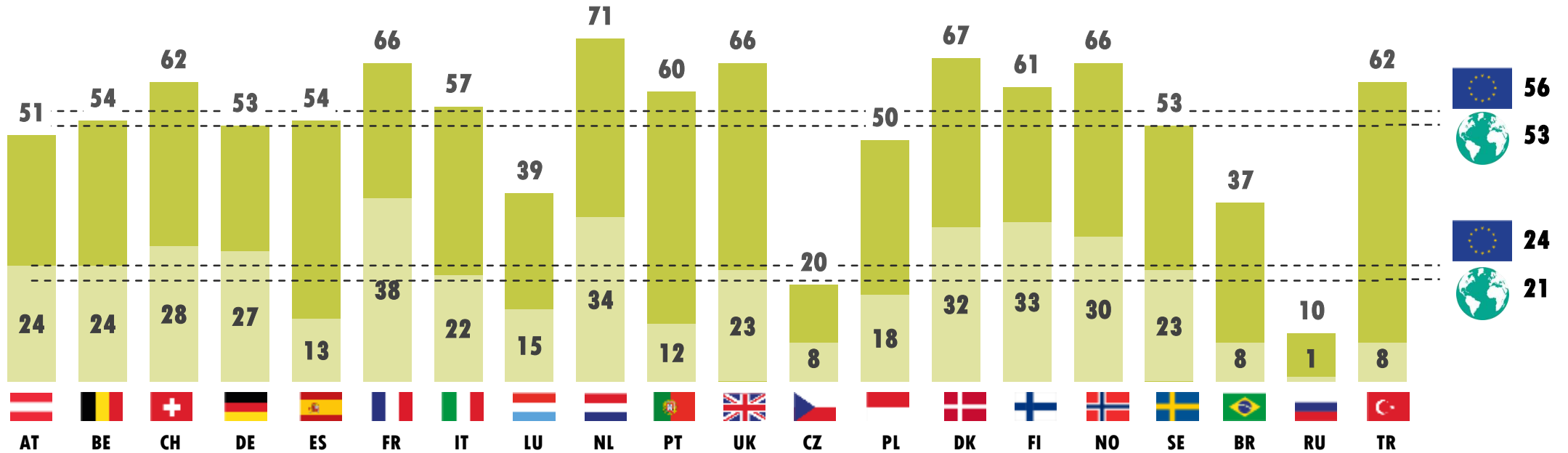
Passenger cars + LCVs



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS

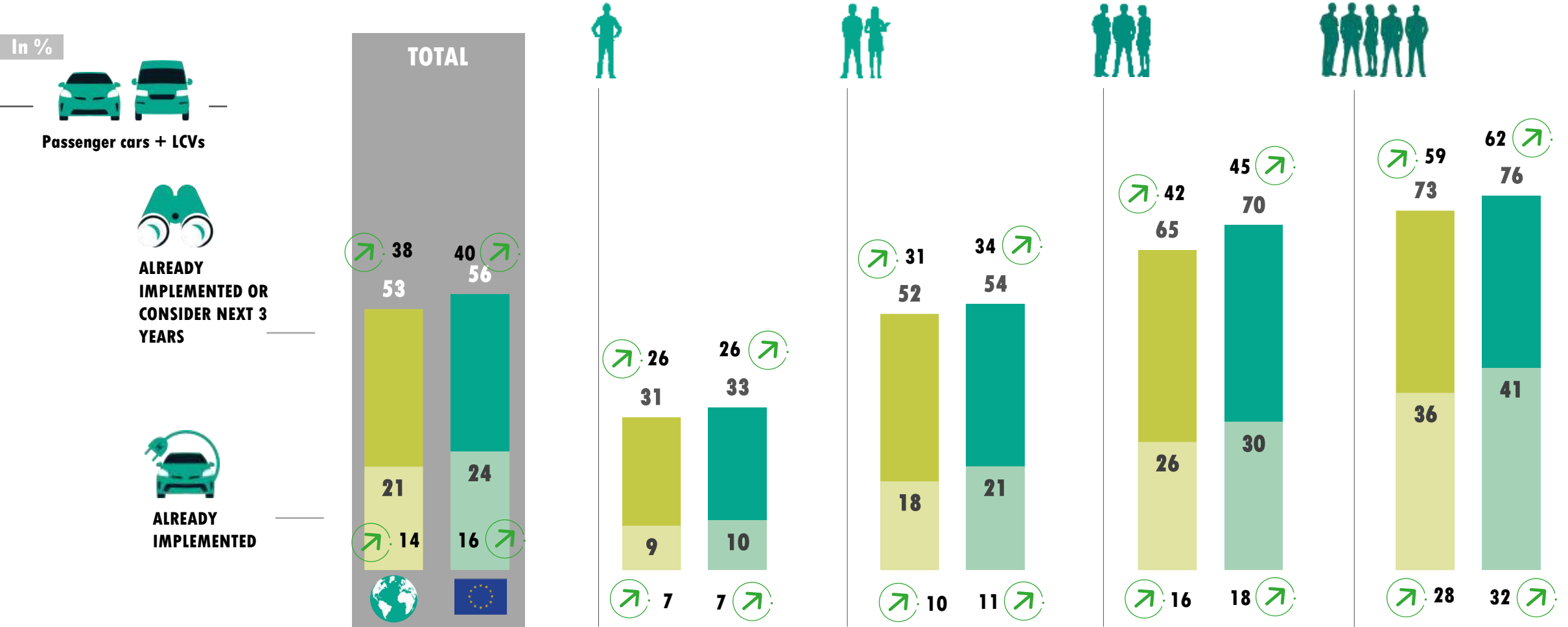


ALREADY IMPLEMENTED



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

100% BATTERY ELECTRIC VEHICLE IMPLEMENTATION



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

CONSTRAINTS OF 100% BATTERY ELECTRIC VEHICLE IMPLEMENTATION

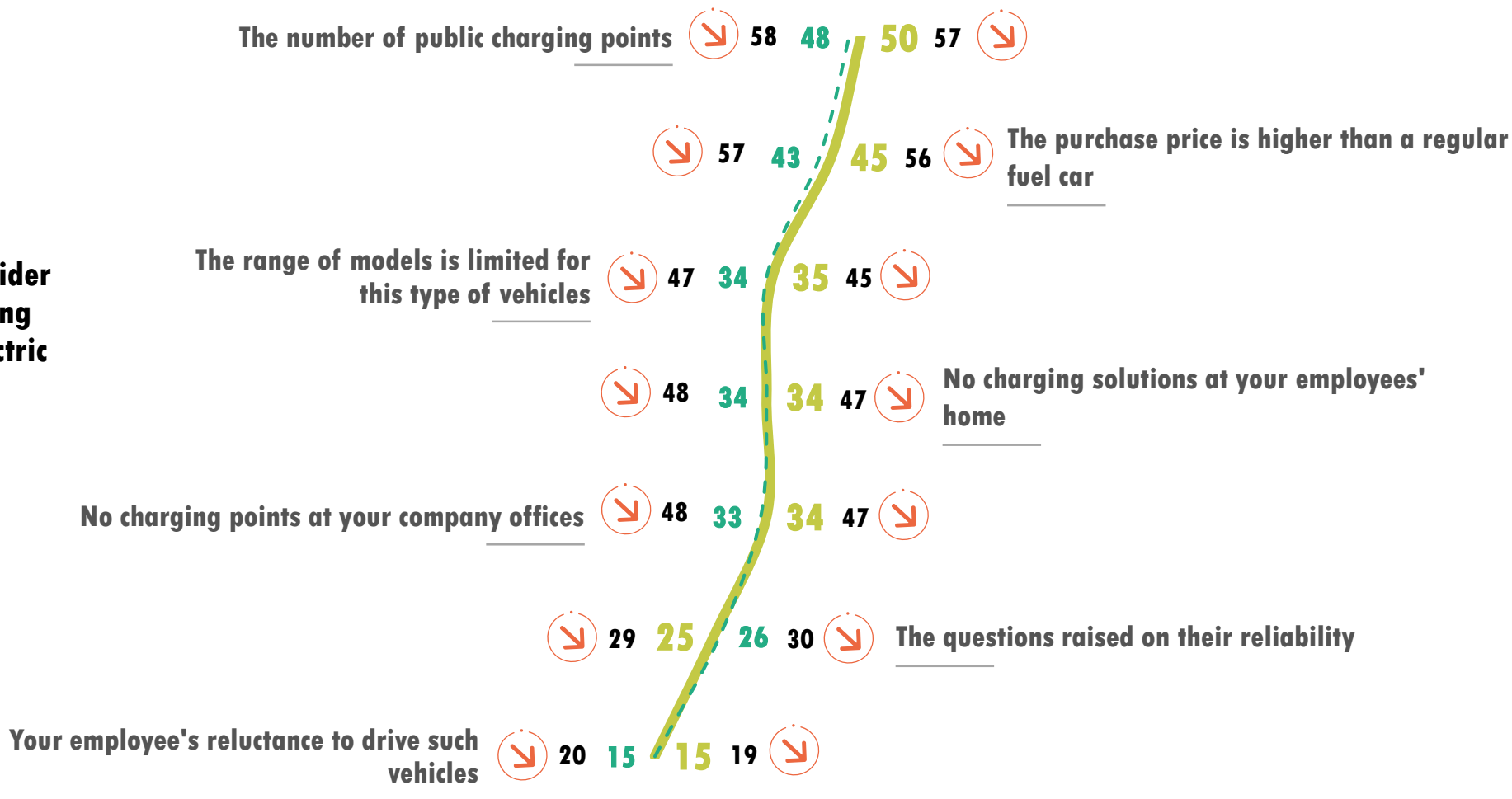
In %



Passenger cars + LCVs

do not consider implementing battery electric vehicles

21



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

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

HOW TO READ THE RESULTS? Companies estimate that BEVs will account for one third of their passenger car fleet in 3 years and for one third of the light commercial vehicle fleet in three years.

In %

 
PASSENGER CARS



 
VANS OR LCVs



TOTAL	
	35
	35
	32
	33



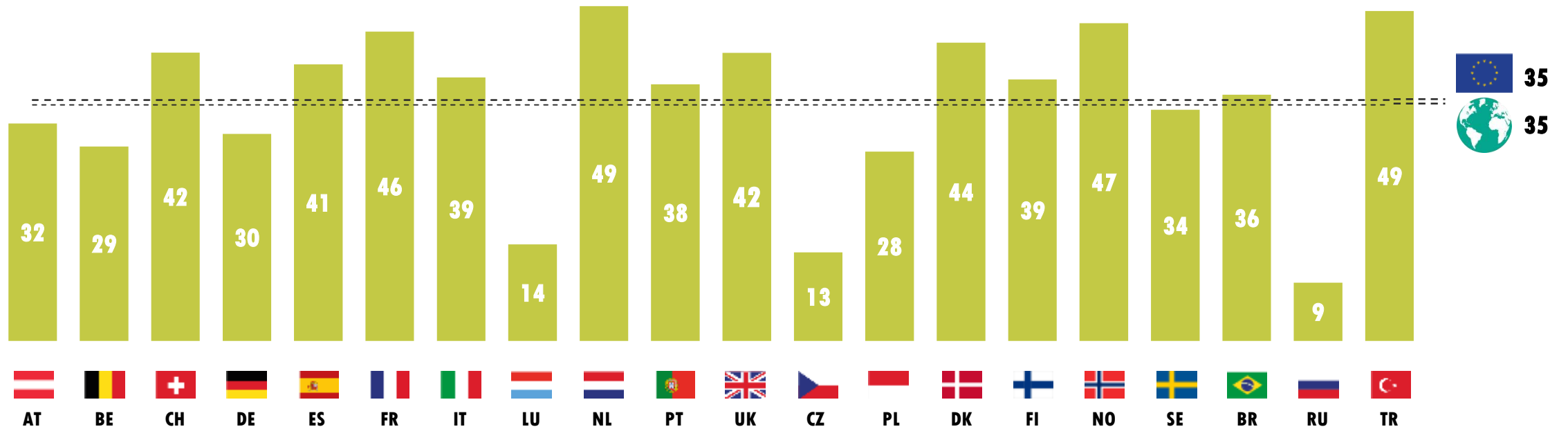
In your opinion, what percentage of your passenger car fleet will be 100% battery electric vehicles in 3 years (100% Battery Electric Vehicle)?
In your opinion, what percentage of your light commercial vehicle fleet will be 100% battery electric vehicles in 3 years (100% Battery Electric Vehicle)?
 Basis: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

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

In %



Passenger cars



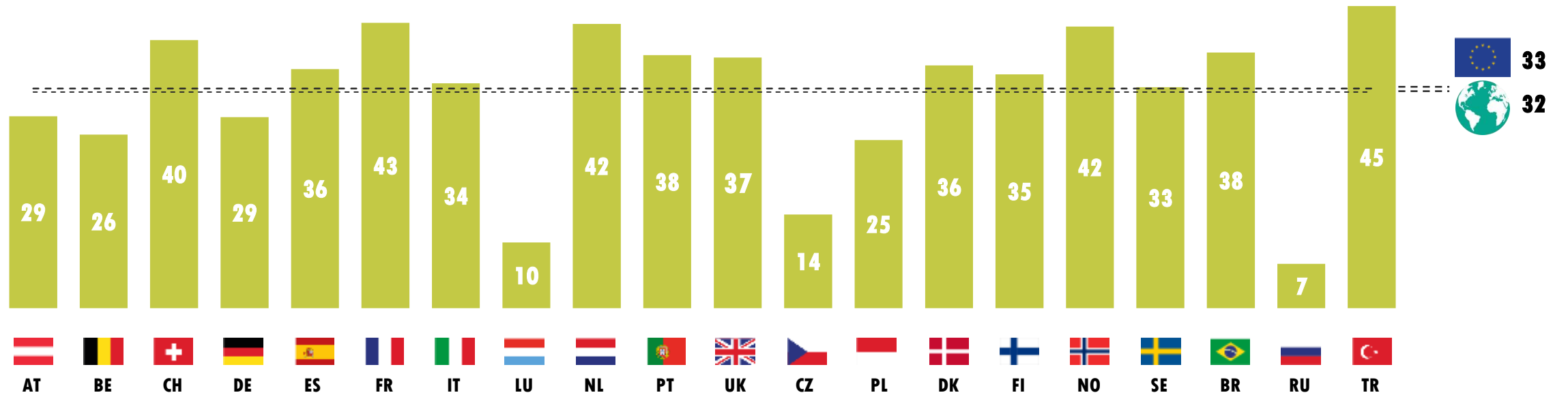
*In your opinion, what percentage of your passenger car fleet will be 100% battery electric vehicles in 3 years (100% Battery Electric Vehicle)?
Basis: companies with passenger cars*

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

In %



LCVs



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

INSTALLATION OF CHARGING POINTS

In %

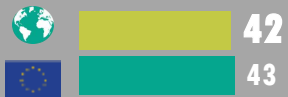


Passenger cars + LCVs

TOTAL



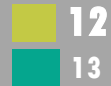
No charging points installed at the company premises



Charging points installed and free charging for drivers



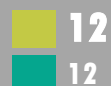
Charging points installed and drivers charged for charging



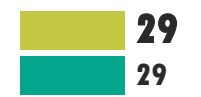
Charging points are planned to be installed in the next 12M



Company subsidizes cost of home installations for drivers



Drivers have to pay for home installation of charging points



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

5

WHAT ARE THE PERSPECTIVES IN TERMS OF ALTERNATIVE MOBILITY SOLUTIONS?



INDIVIDUAL SOLUTIONS ARE BOOSTED BY THE PANDEMIC CONTEXT, YET SHARED SOLUTIONS REMAIN SOURCE OF INTEREST FOR THE 'NEW NORMAL AFTER COVID-19'.

1

- This year more than ever, the crisis has contributed to turning mobility into a strategic topic on the short / mid-term: offering alternative mobility solutions to their employees has been a real challenge for companies, for understandable reasons of health safety.

In this context, the use of many alternative mobility solutions has developed, regardless the company size. Notably:

- **Individual car solutions like private lease/salary sacrifice (25%, +11 pts).**
- **Corporate car sharing (28%, + 9 pts), that is also a mean of providing a safe commute to employees due to strict disinfection process.**
- **Mobility budget is also showing sensible progression in usages (29%, +15 pts), offering more options and flexibility to employees in a fast-moving context.**

2

- But beyond the specific context, fleet managers also tend to project themselves out of the crisis, redesigning more broadly their mobility offer to meet their employees' needs and face higher fleet costs but also considering environmental impacts:

Thus, they also show an increasing interest for shared mobility solutions:

- **Ride sharing: 58% already or consider using it in the next 3 years (+ 15 pts)**
- **Short /Mid term rental : 61 % already or consider using it in the next 3 years**

In this context, an app to book mobility solutions could be implemented in 1 out of 2 companies in the future.

3

- Lastly, fleet managers predict a bright future to these alternative solutions. For those companies already using or considering implementing alternative solutions, half of them even think that their company car drivers would complement their company car benefit for such alternatives in the future.

MOBILITY ALTERNATIVES LIST AND DEFINITIONS



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



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



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



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

For Italy: only private lease

For Portugal: only salary sacrifice



PUBLIC TRANSPORT



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

AT LEAST ONE ALTERNATIVE ALREADY IMPLEMENTED

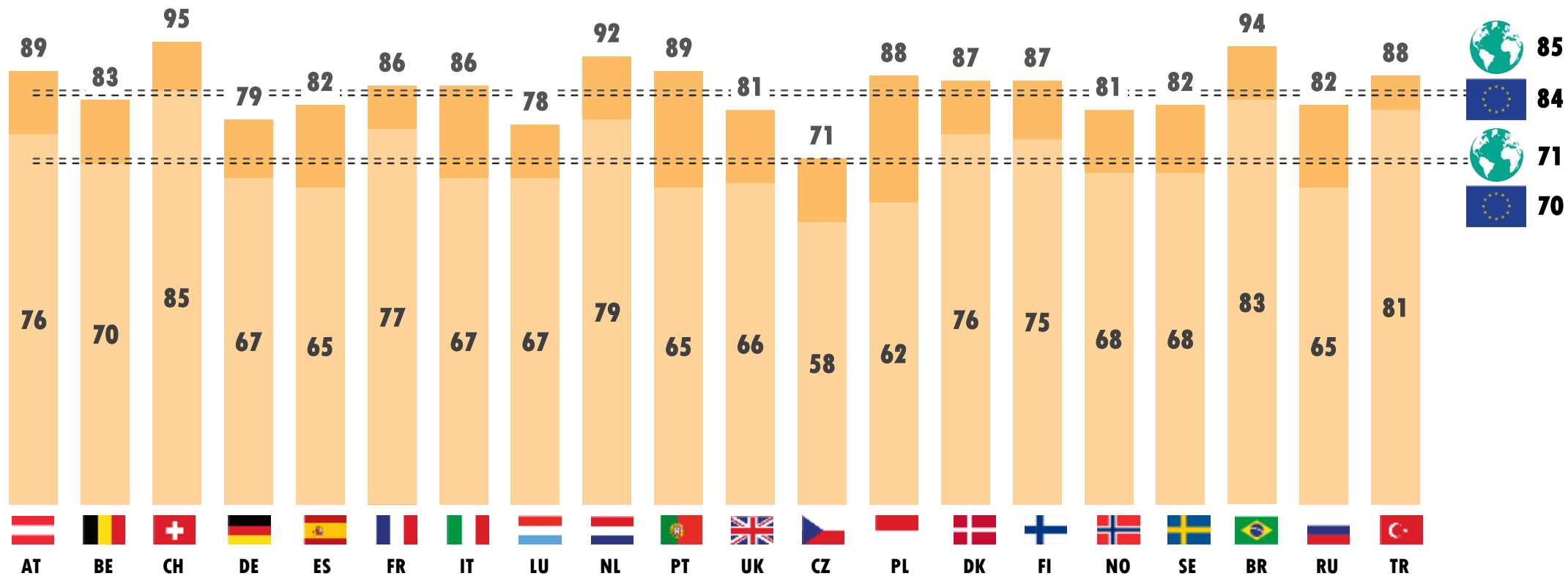
In %



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%

ALTERNATIVE MOBILITY IMPLEMENTATION – AT LEAST ONE ALREADY IMPLEMENTED

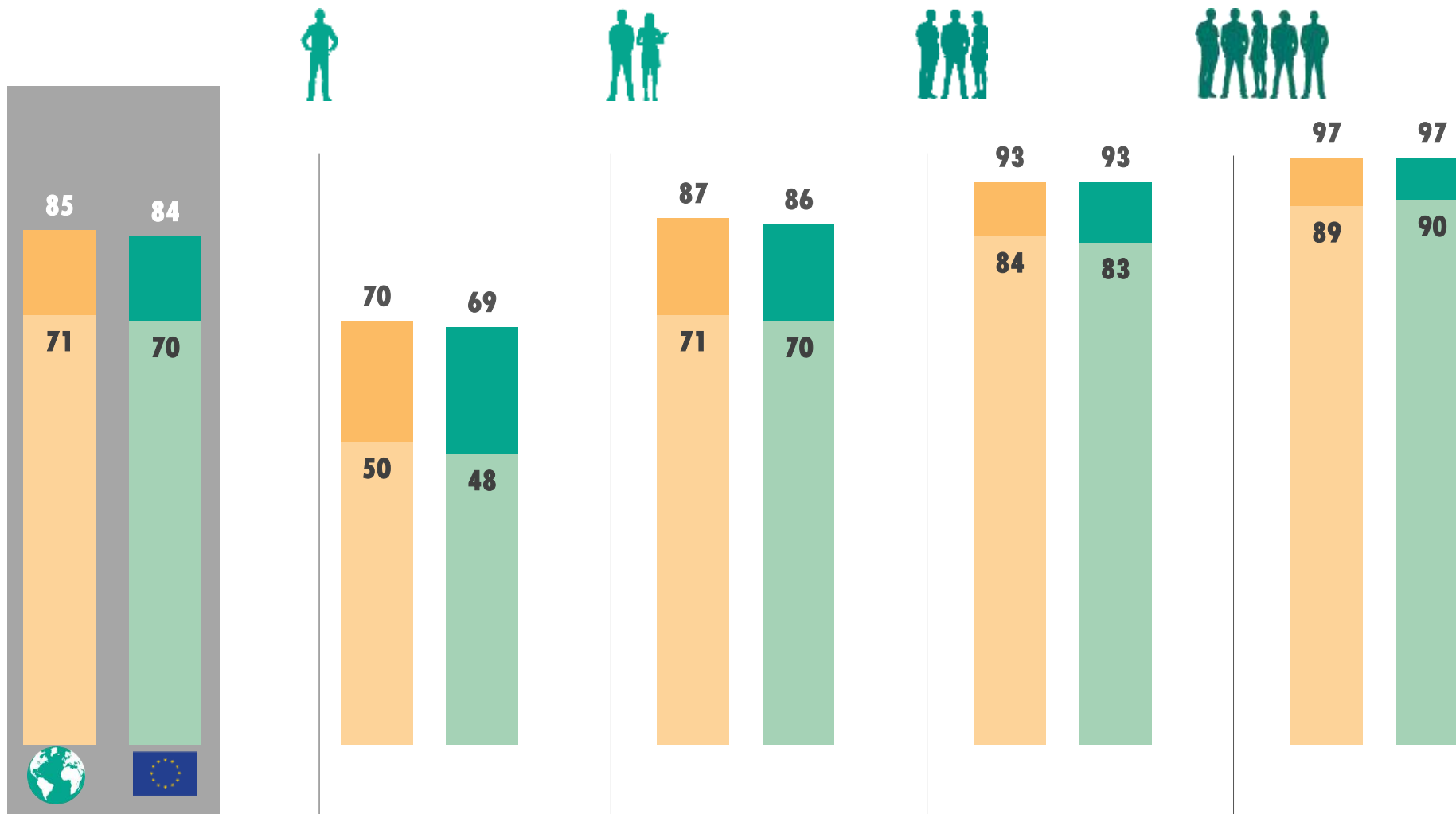
In %



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%

OVERVIEW OF ALTERNATIVE MOBILITY SOLUTIONS IMPLEMENTATION

In %

71%

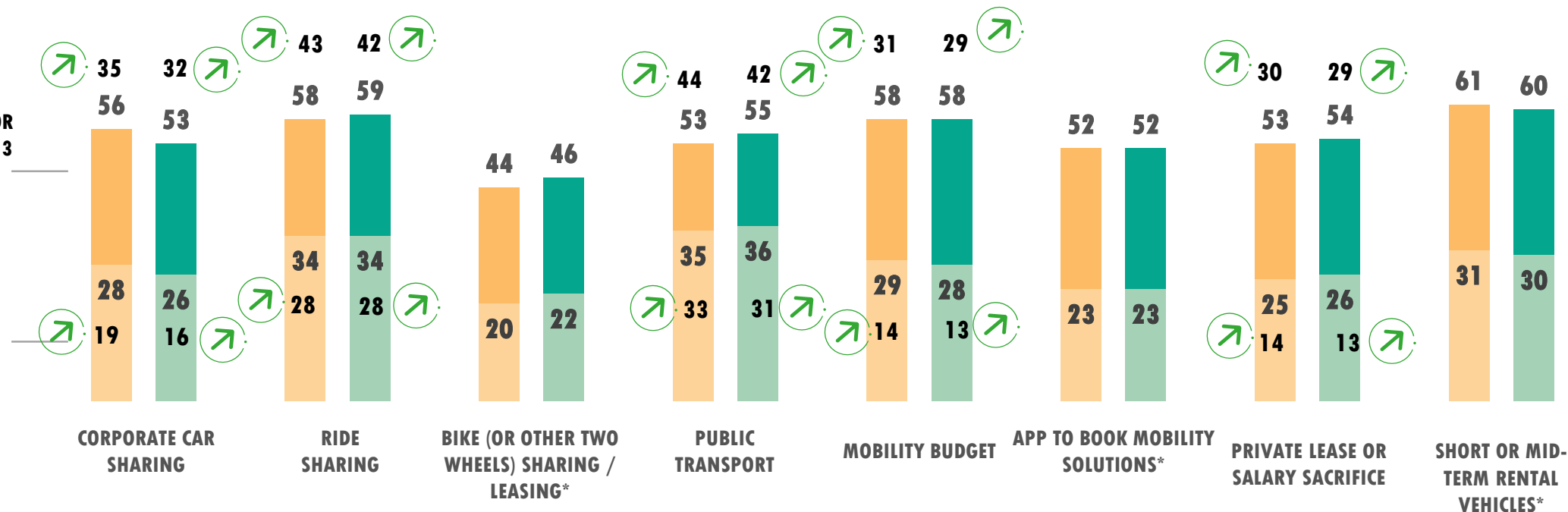
Of companies have already implemented at least one of these solutions



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY USING



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

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

CORPORATE CAR SHARING IMPLEMENTATION

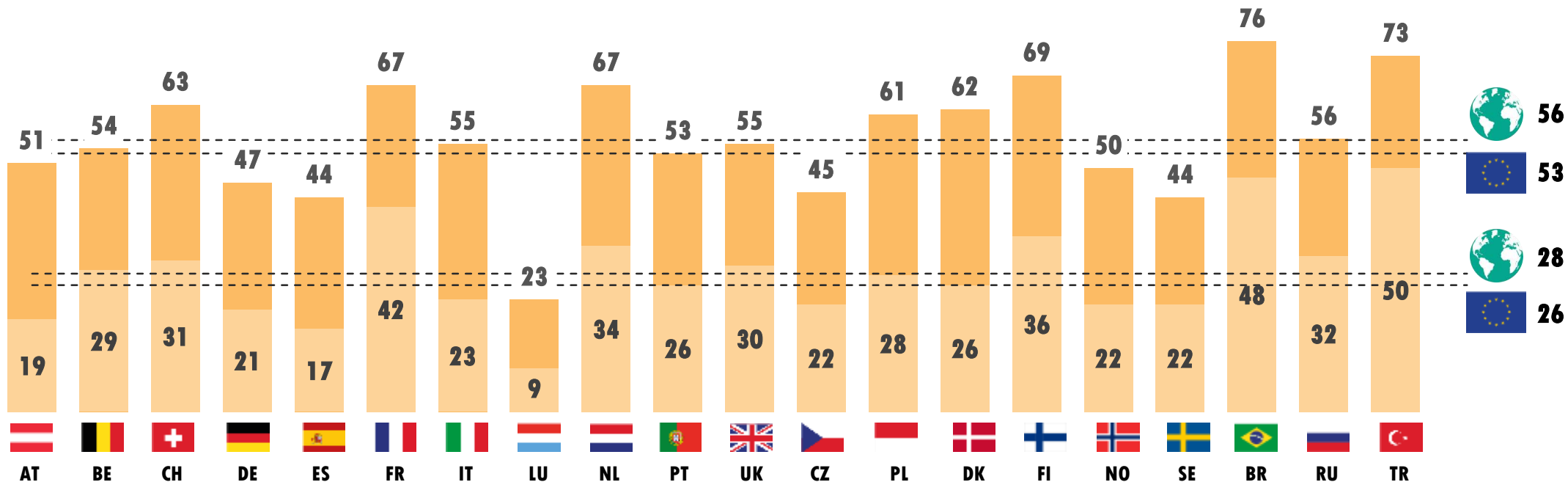
In %



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



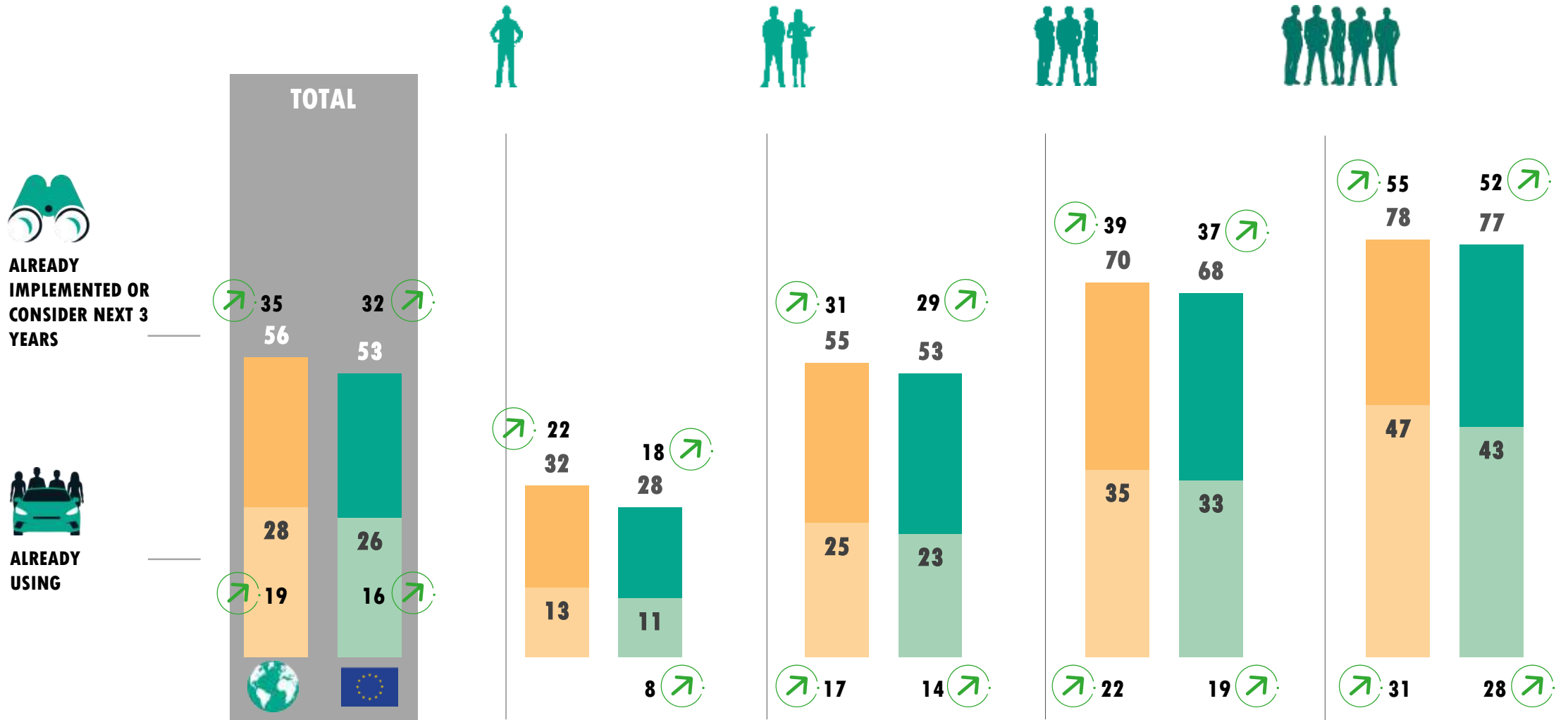
ALREADY USING



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%

CORPORATE CAR SHARING IMPLEMENTATION

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%

RIDE SHARING IMPLEMENTATION

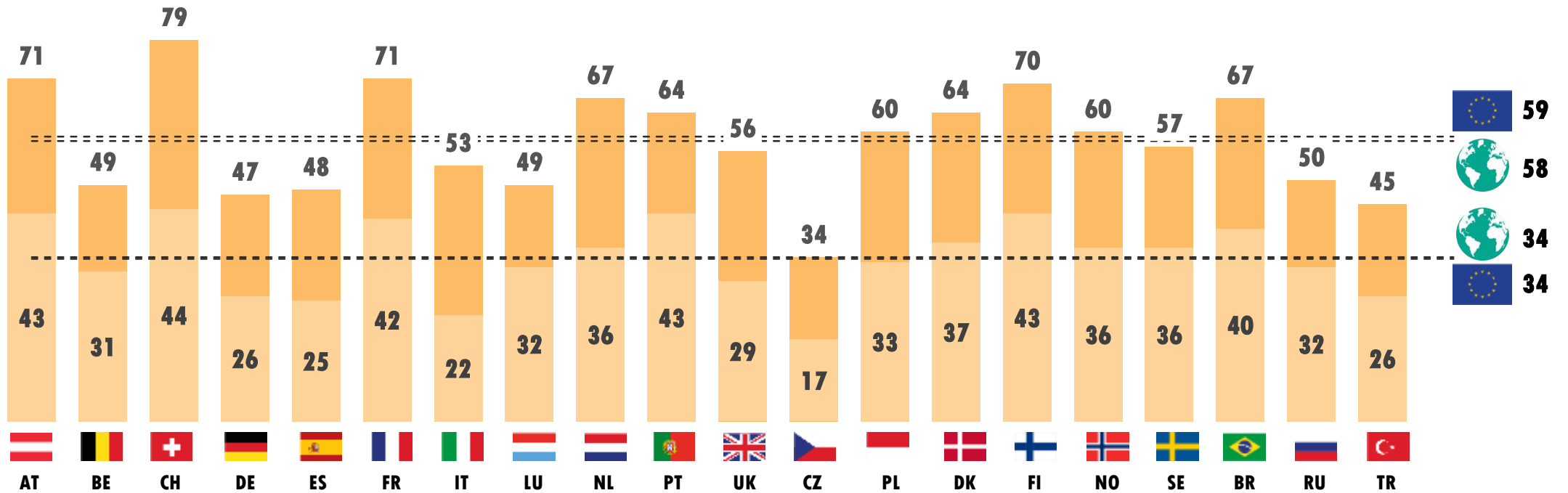
In %



**ALREADY
IMPLEMENTED OR
CONSIDER NEXT 3
YEARS**



**ALREADY
USING**



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

RIDE SHARING IMPLEMENTATION

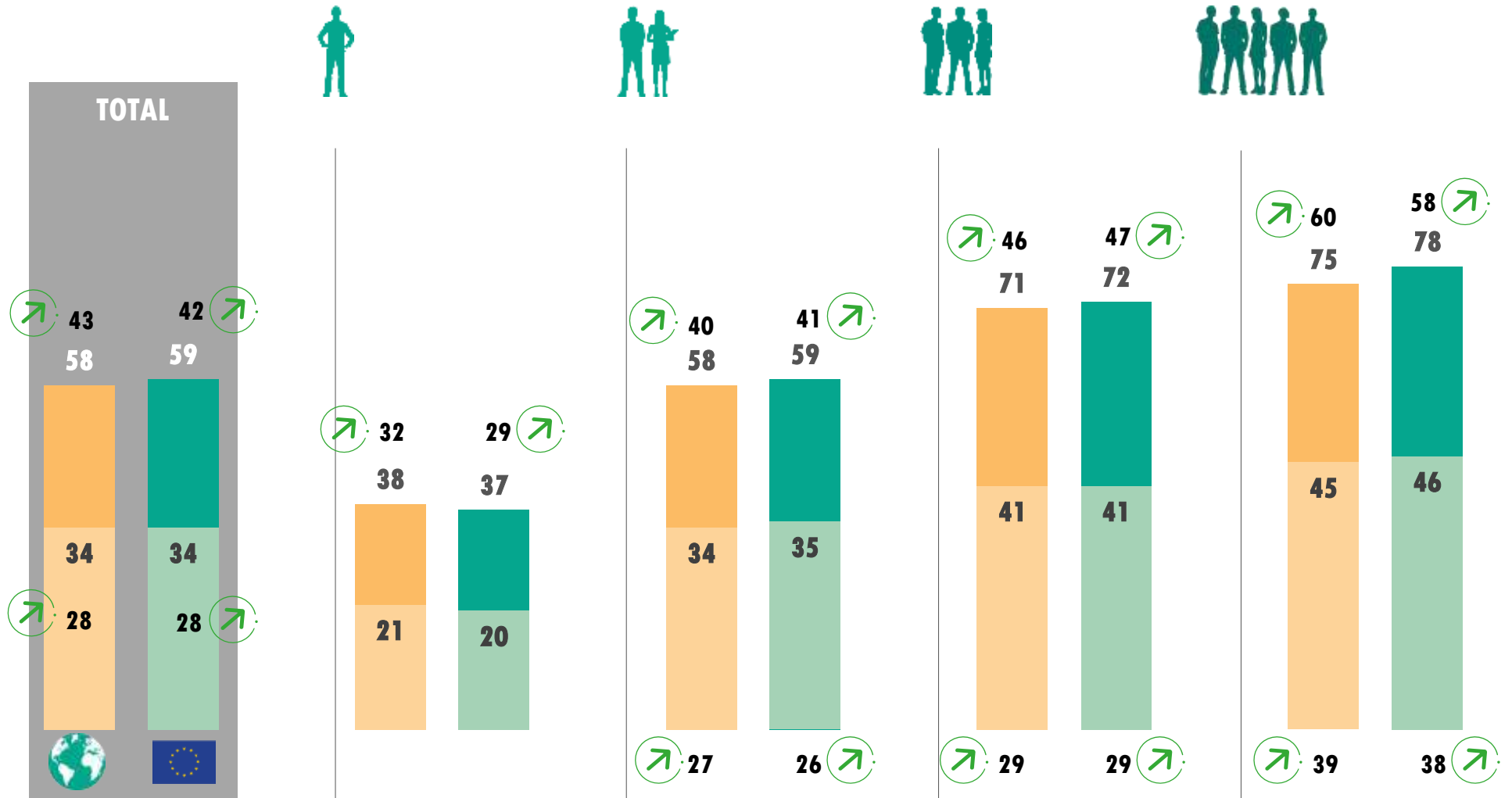
In %



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY USING



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

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

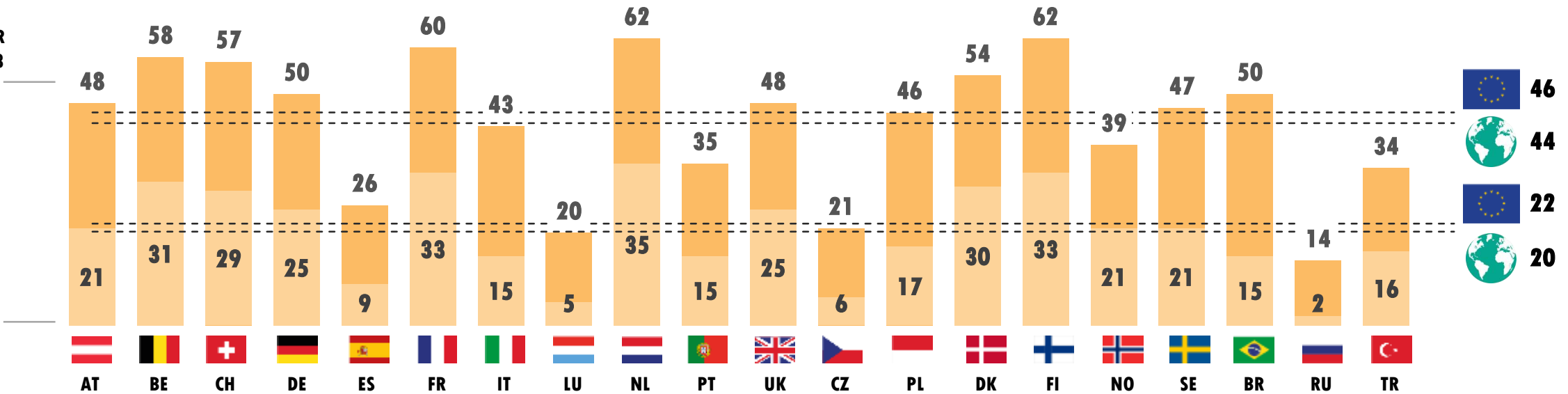
In %



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY USING



*This item has changed, no comparison vs previous year

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

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

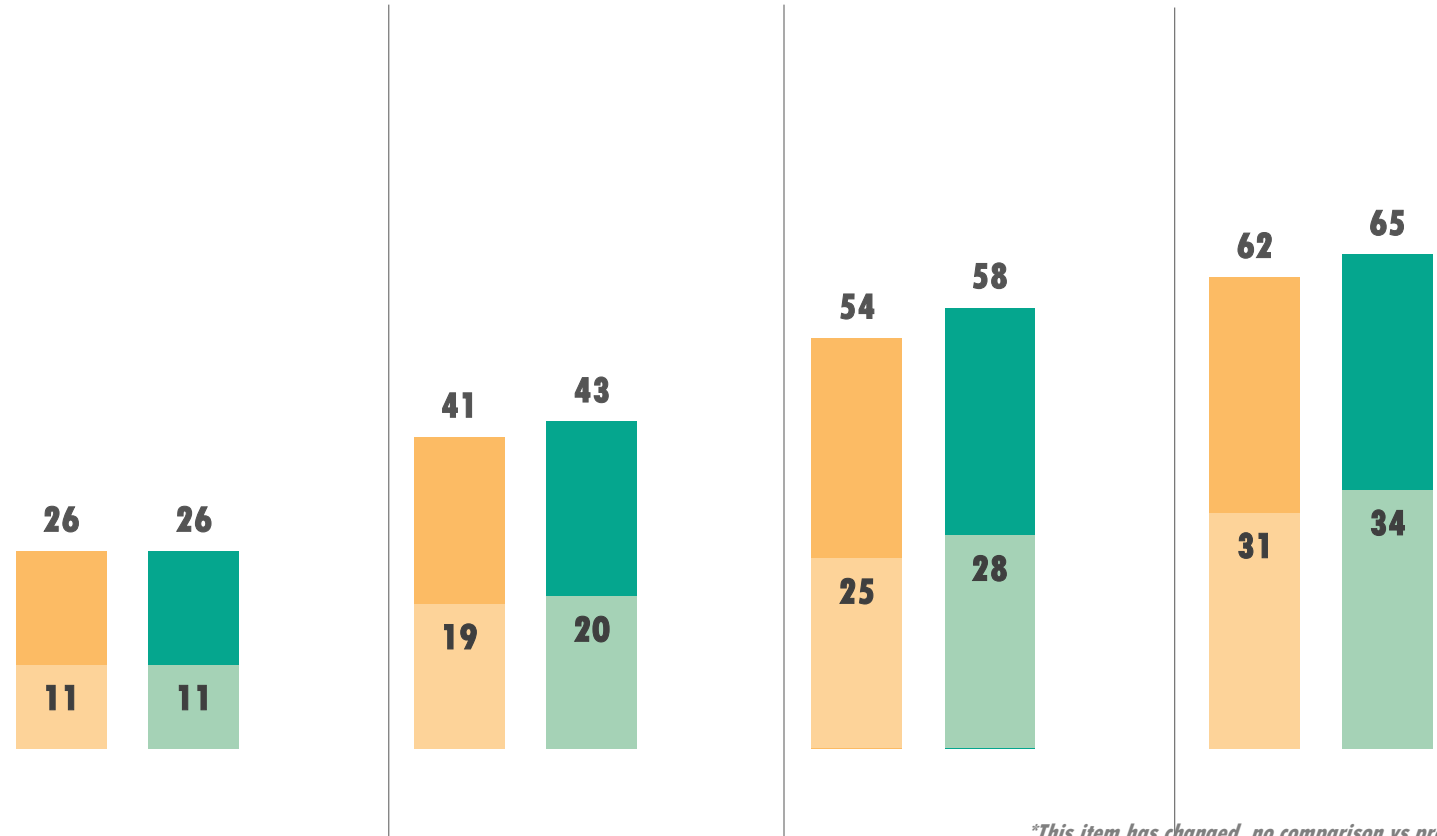
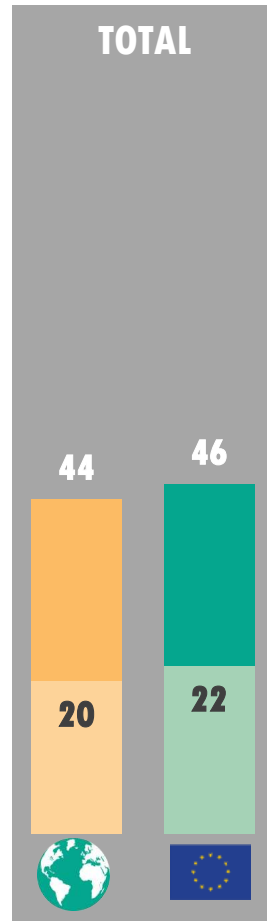
In %



**ALREADY
IMPLEMENTED OR
CONSIDER NEXT 3
YEARS**



**ALREADY
USING**



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

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

PUBLIC TRANSPORT IMPLEMENTATION

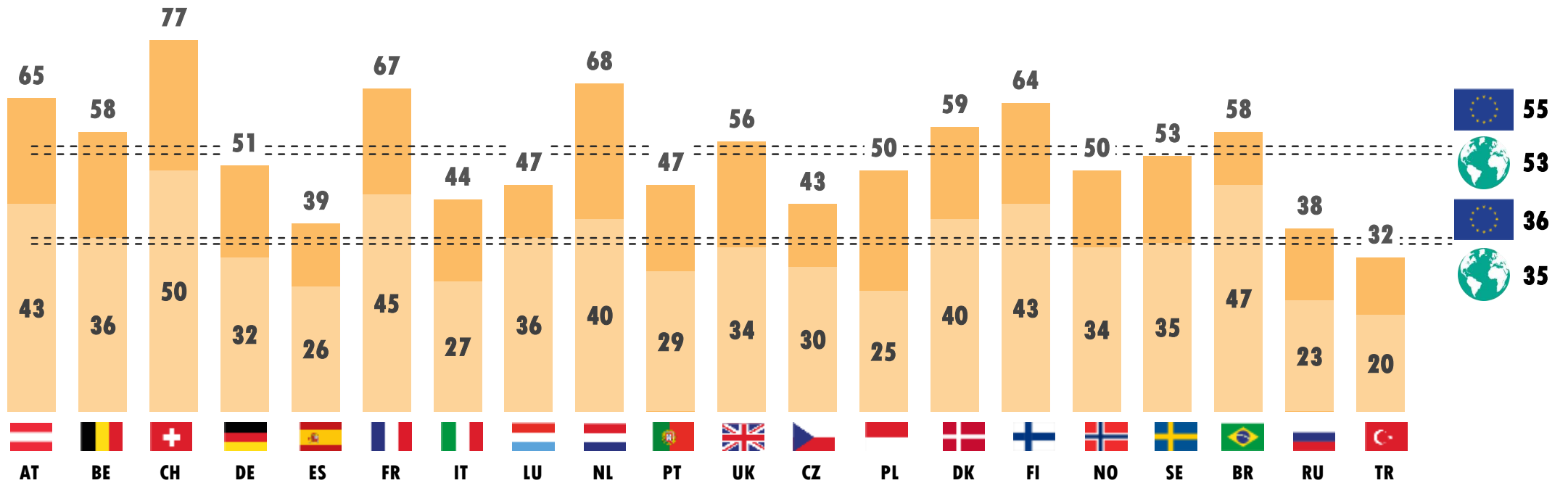
In %



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY USING



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

PUBLIC TRANSPORT IMPLEMENTATION

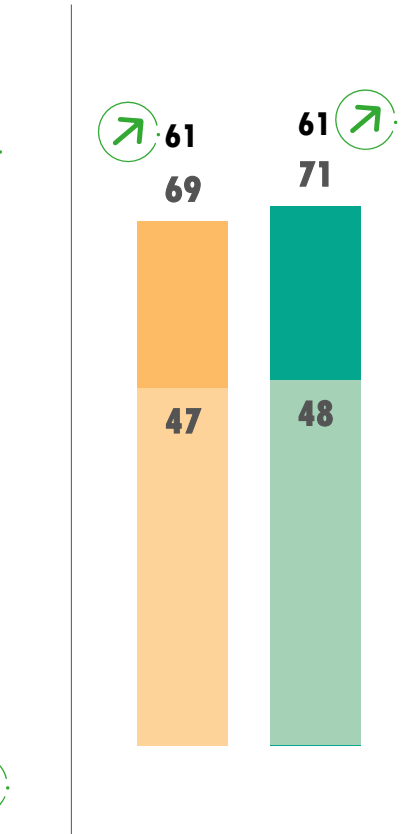
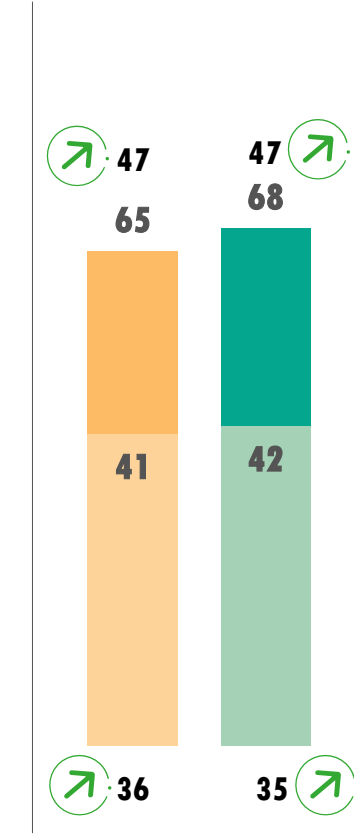
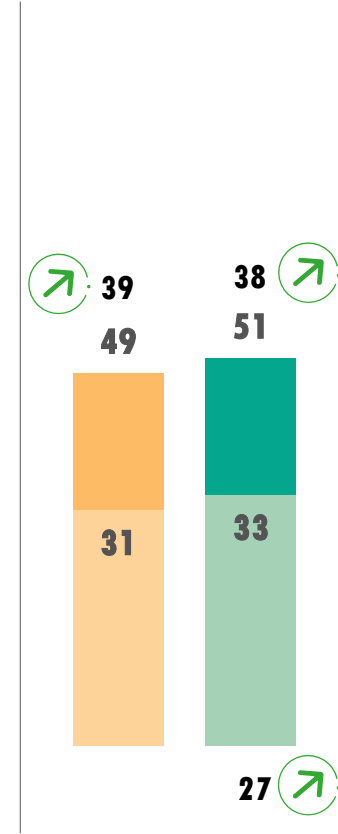
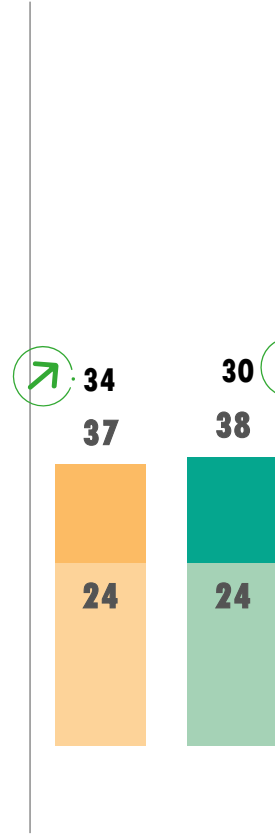
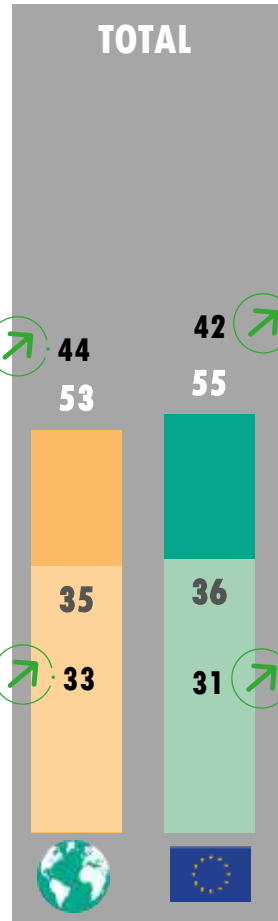
In %



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY USING



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

MOBILITY BUDGET IMPLEMENTATION

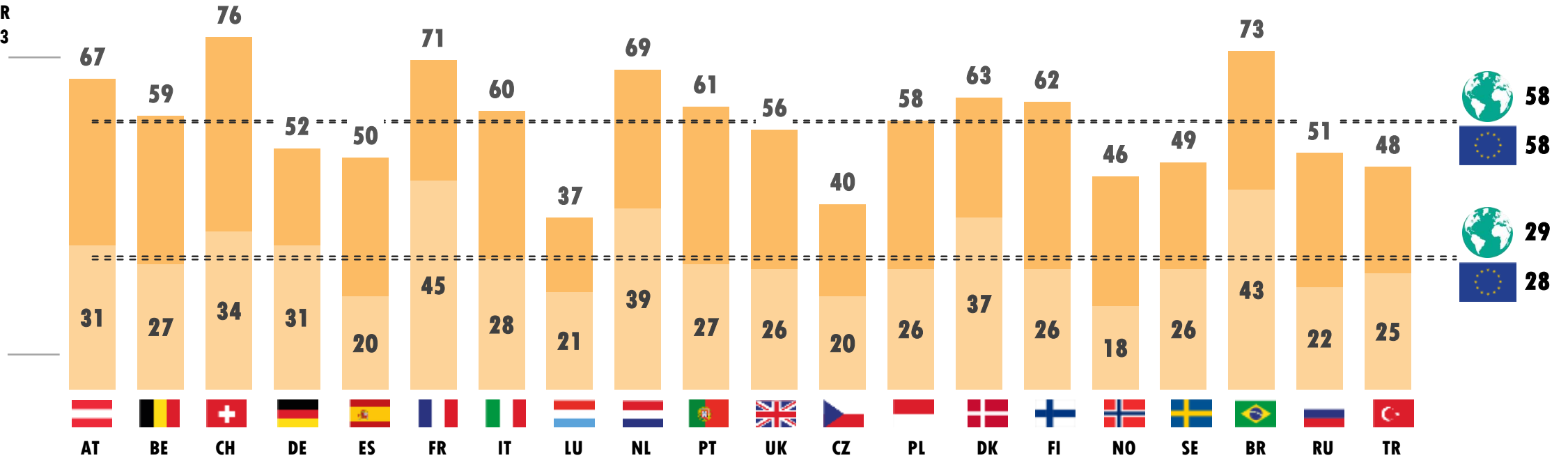
In %



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY USING



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

MOBILITY BUDGET IMPLEMENTATION

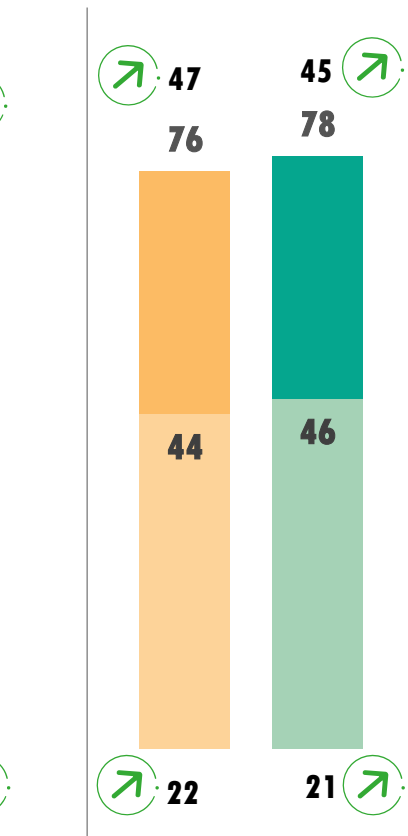
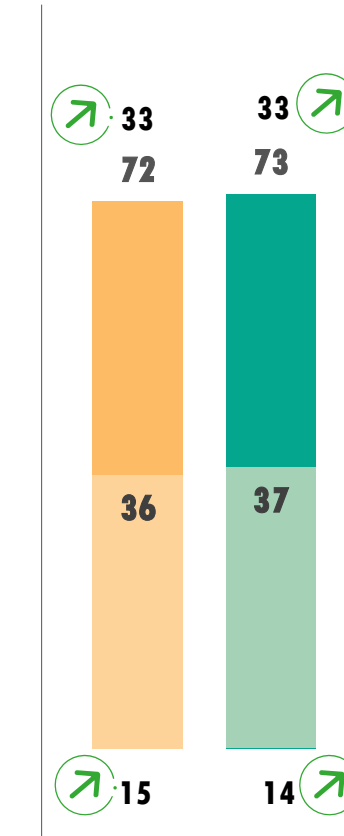
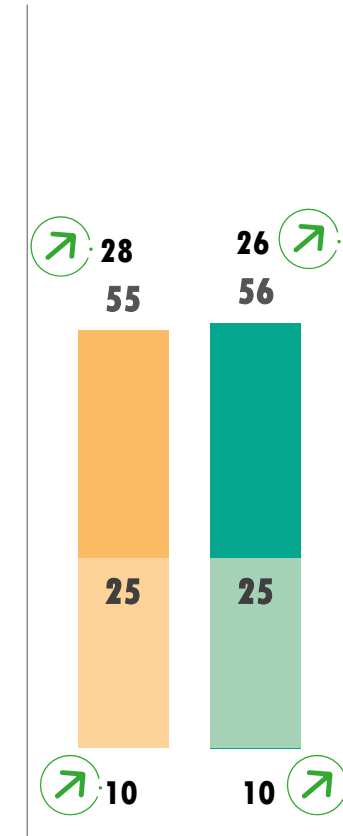
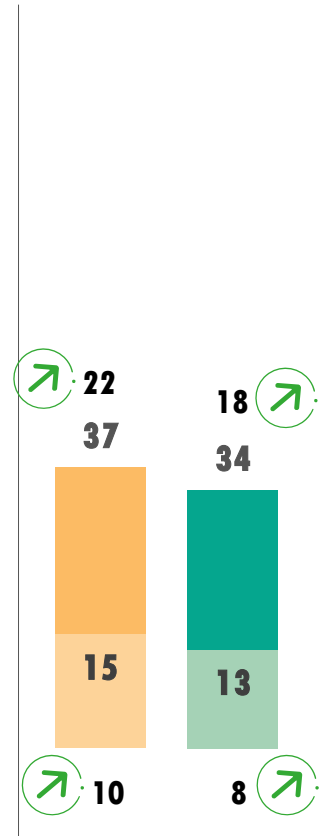
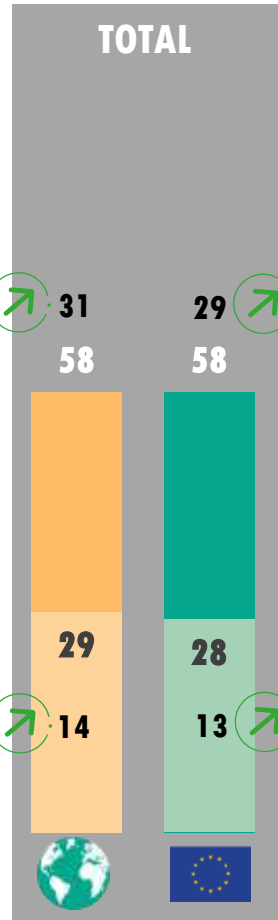
In %



**ALREADY
IMPLEMENTED OR
CONSIDER NEXT 3
YEARS**



**ALREADY
USING**



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

AN APP TO BOOK MOBILITY SOLUTIONS IMPLEMENTATION*

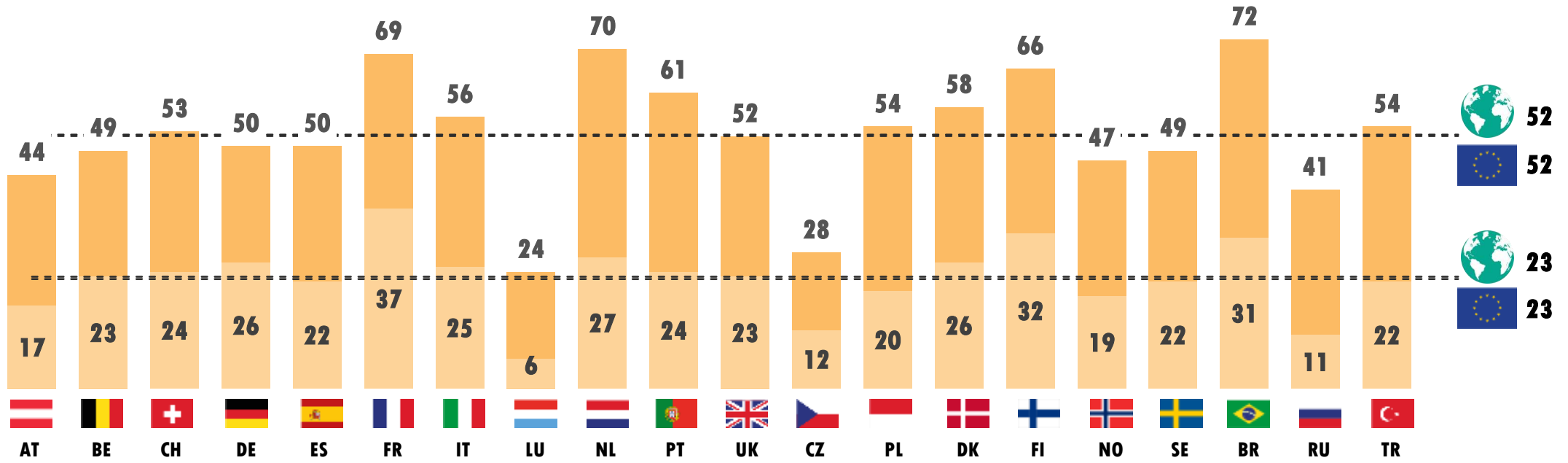
In %



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY USING



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

AN APP TO BOOK MOBILITY SOLUTIONS IMPLEMENTATION*

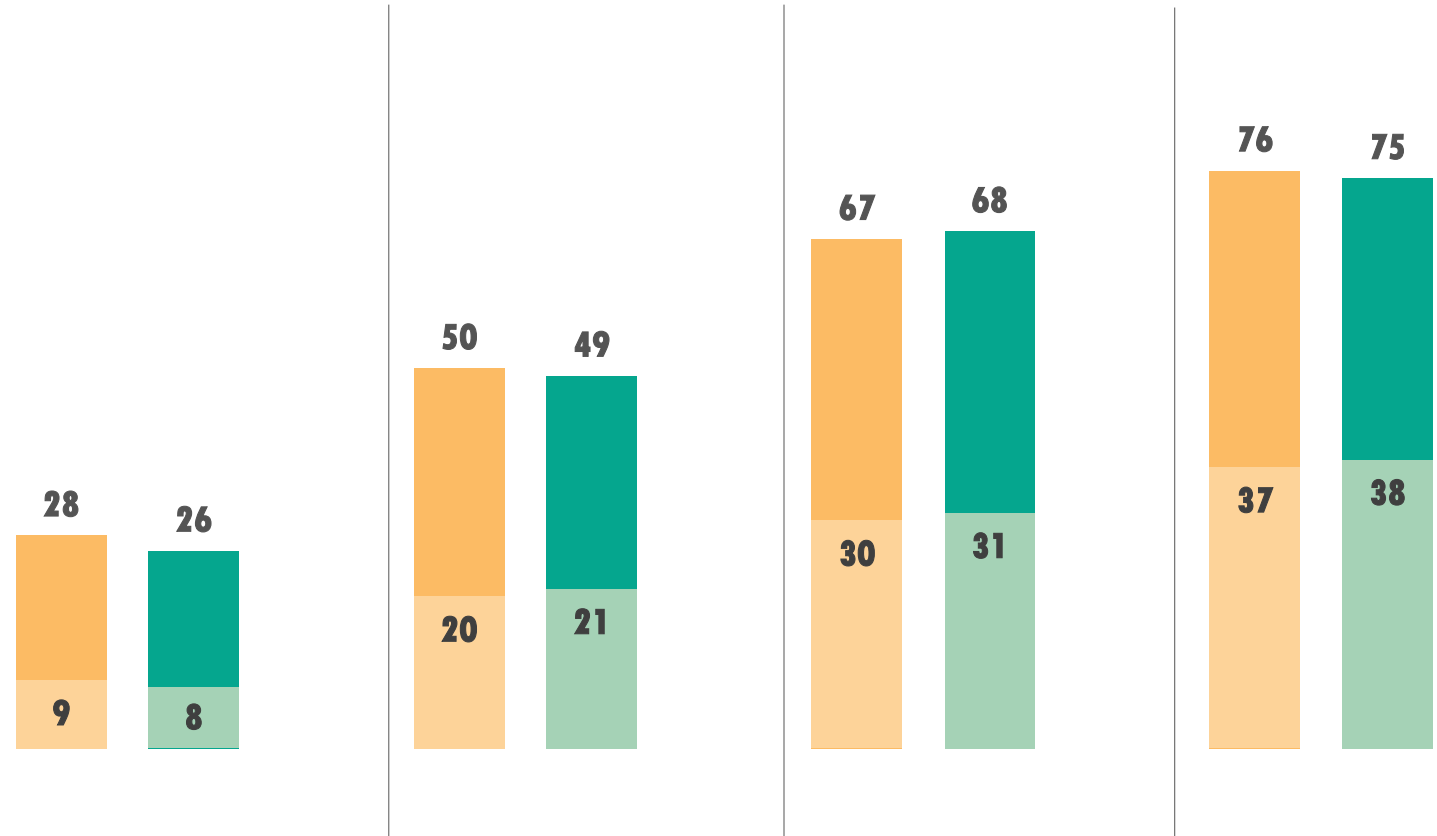
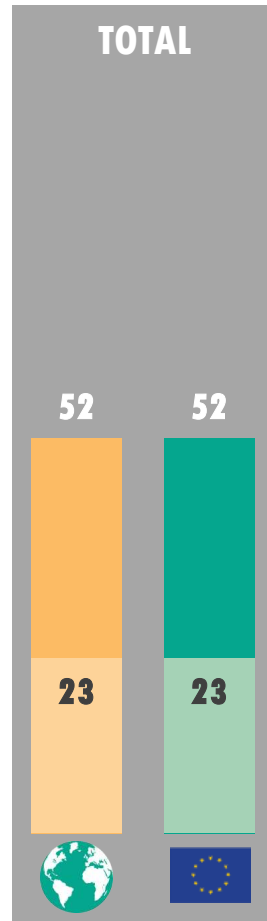
In %



**ALREADY
IMPLEMENTED OR
CONSIDER NEXT 3
YEARS**



**ALREADY
USING**



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

PRIVATE LEASE OR SALARY SACRIFICE IMPLEMENTATION

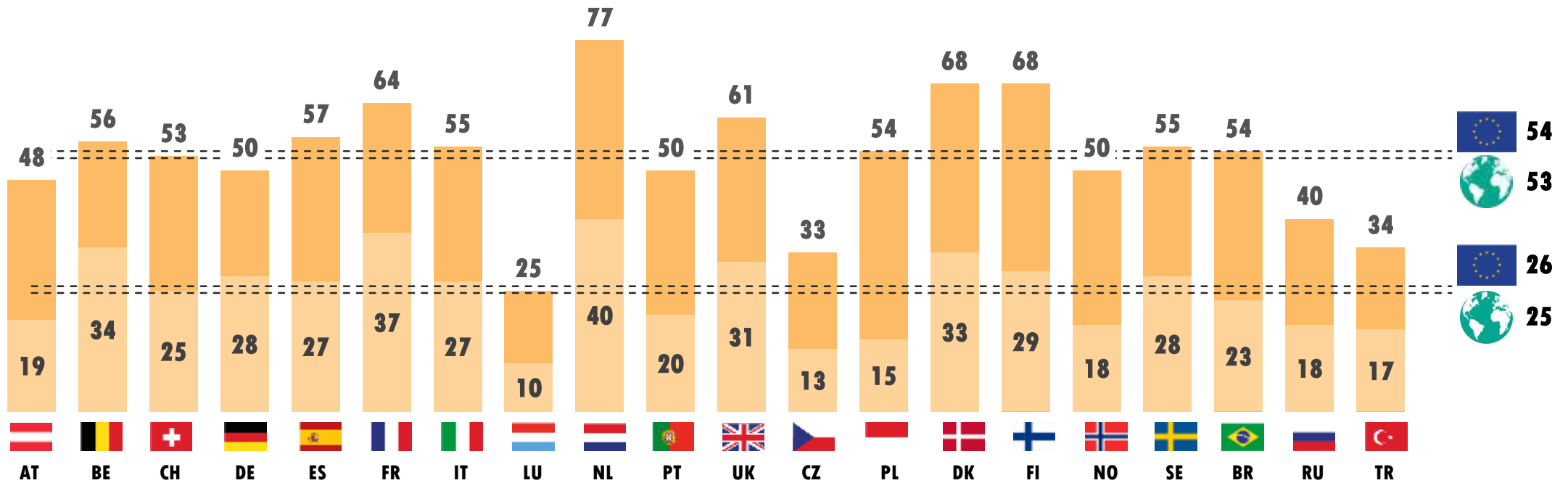
In %



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY USING



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

PRIVATE LEASE OR SALARY SACRIFICE IMPLEMENTATION

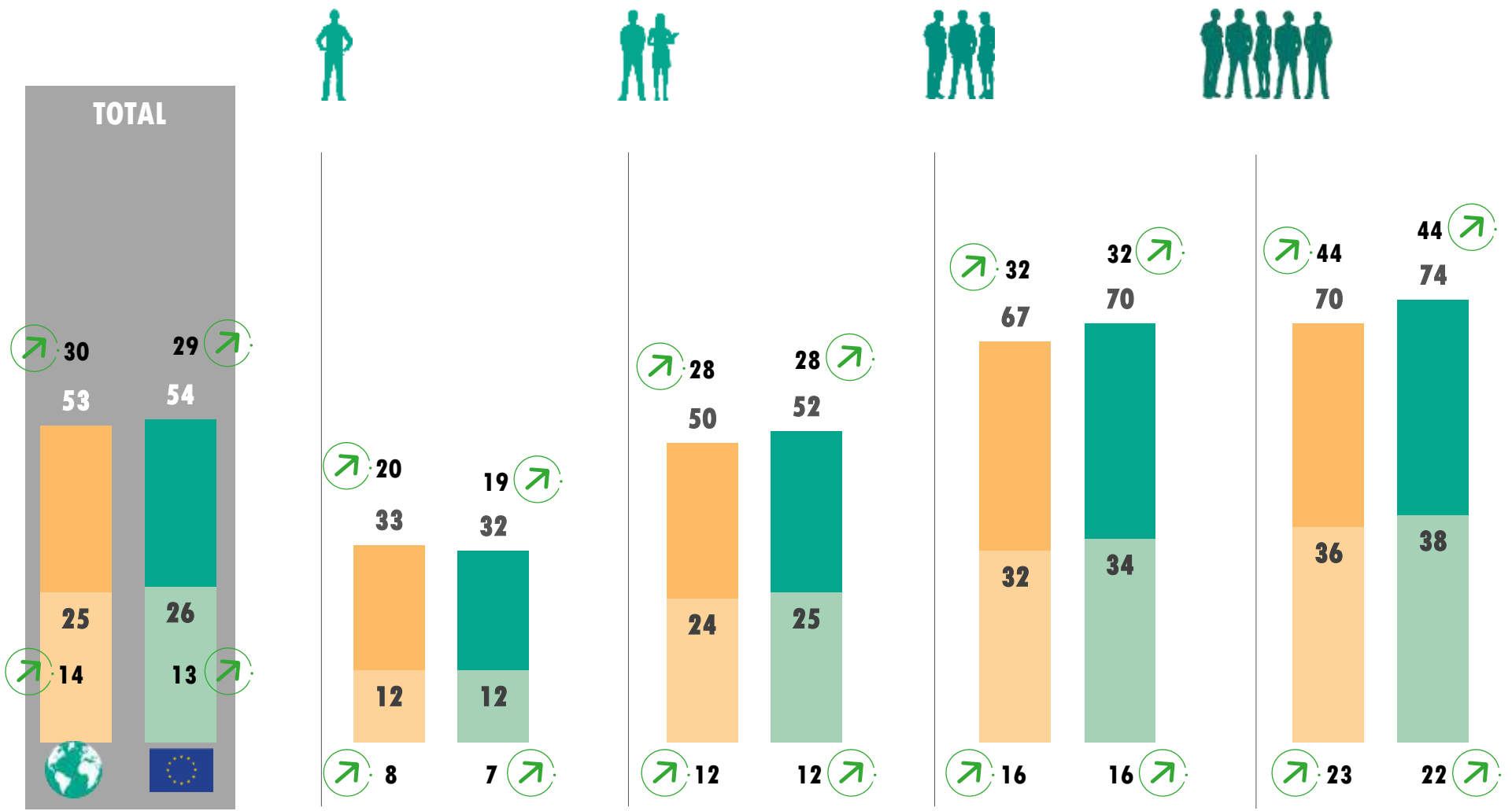
In %



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY USING



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

SHORT OR MID-TERM RENTAL VEHICLES IMPLEMENTATION*

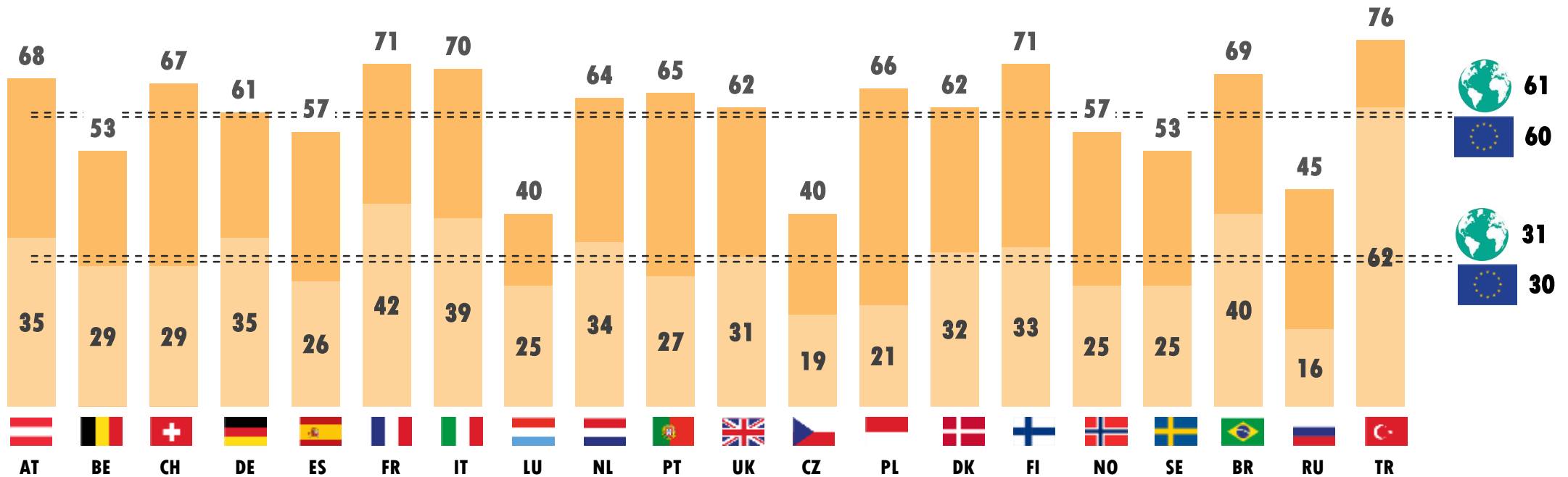
In %



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY USING



*This item has changed, no comparison vs previous year

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

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

Basis: companies with corporate vehicles = 100%

SHORT OR MID-TERM RENTAL VEHICLES IMPLEMENTATION*

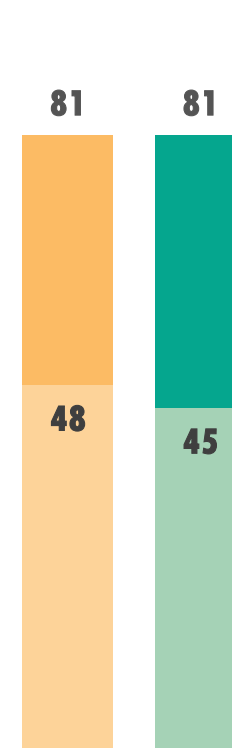
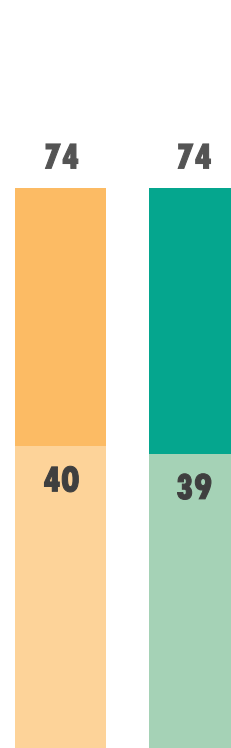
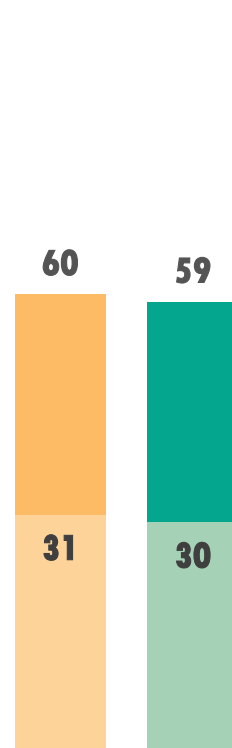
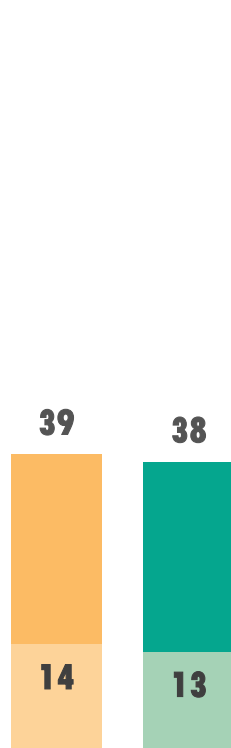
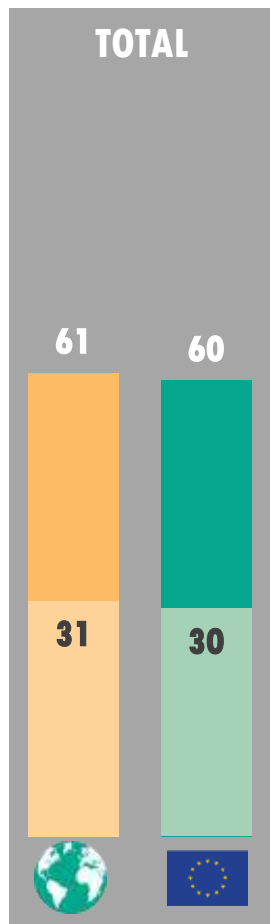
In %



**ALREADY
IMPLEMENTED OR
CONSIDER NEXT 3
YEARS**



**ALREADY
USING**



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

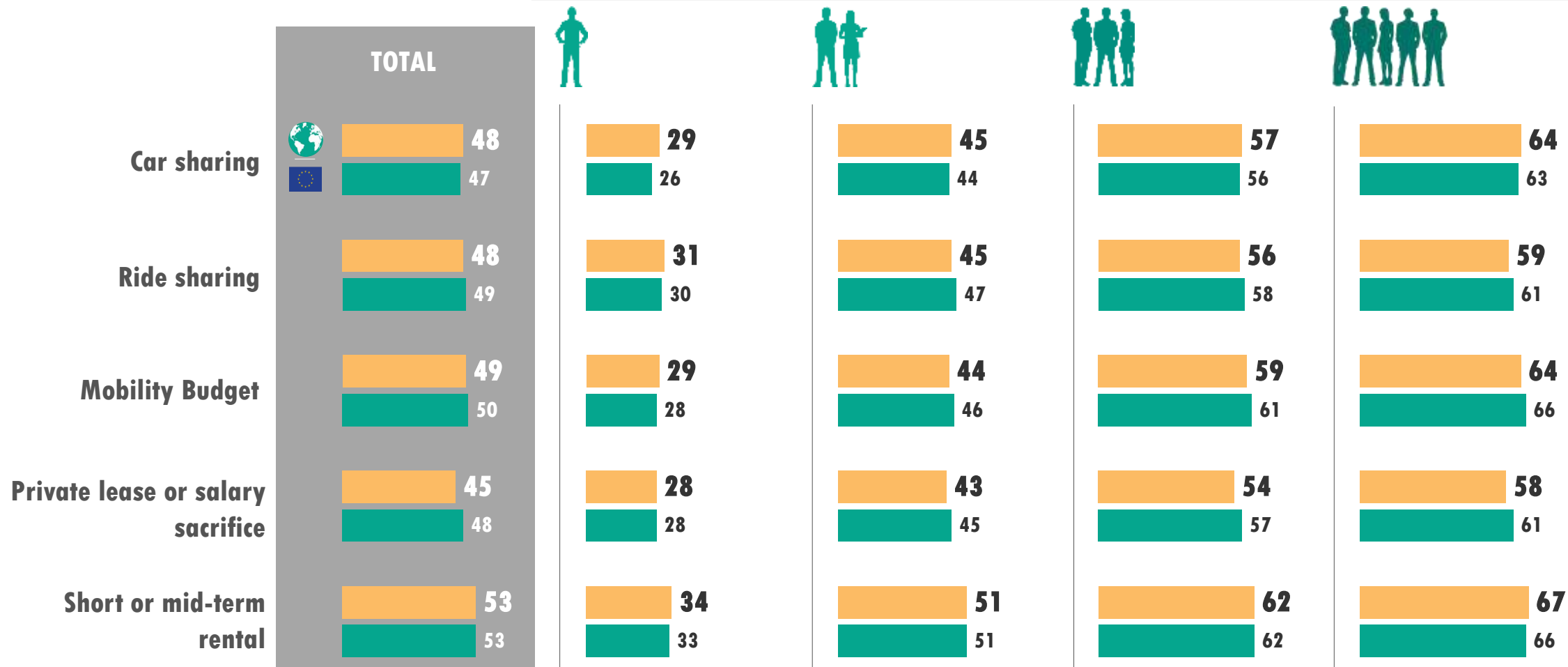
MOBILITY SOLUTIONS CONSIDERED BY DRIVERS TO COMPLEMENT THEIR COMPANY VEHICLE

TOTAL Certainly or probably

HOW TO READ THE RESULTS?

For those companies already using or considering implementing alternative solutions, half of them anticipate that their company car drivers would certainly or probably complement their company car benefit for such alternatives in the future

In %



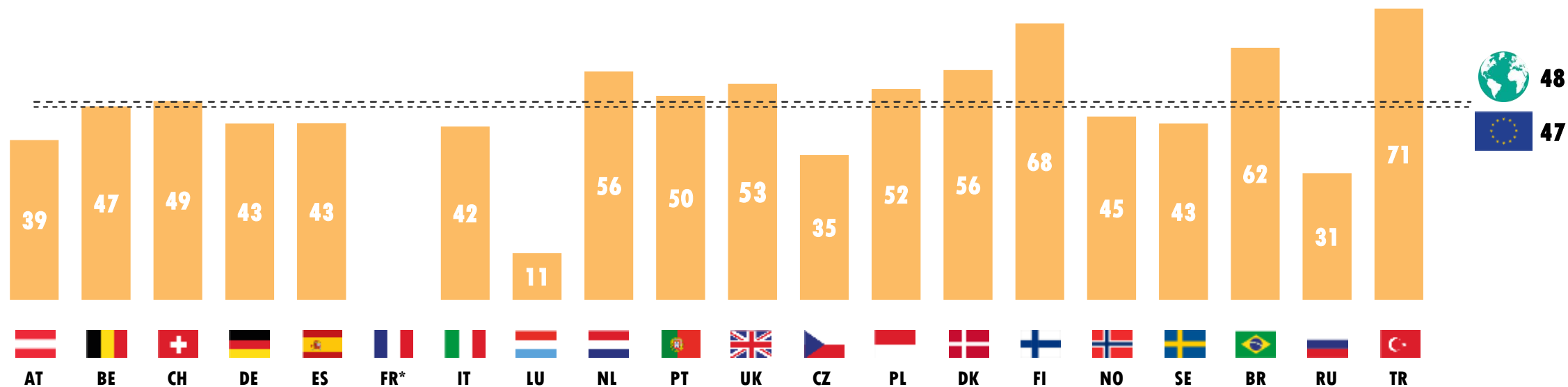
New question 2021

Would you anticipate that your company car drivers would exchange all or part of their company car benefit for such alternatives?

Basis: companies using or considering alternative mobility solutions

CAR SHARING CONSIDERED BY DRIVERS TO COMPLEMENT THEIR COMPANY VEHICLE

TOTAL Certainly or probably

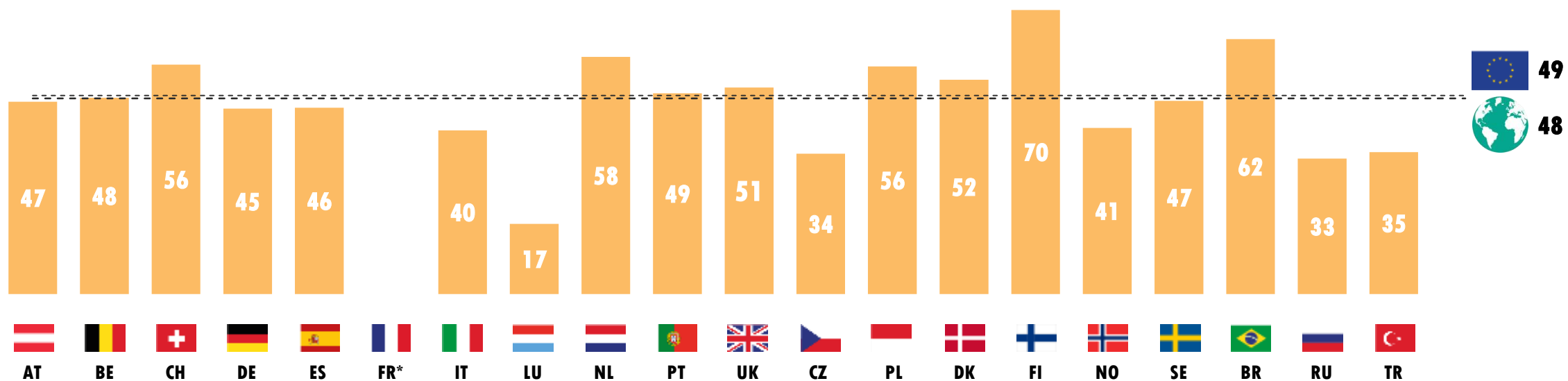


**The question asked for France is not comparable to other countries*

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

RIDE SHARING CONSIDERED BY DRIVERS TO COMPLEMENT THEIR COMPANY VEHICLE

TOTAL Certainly or probably

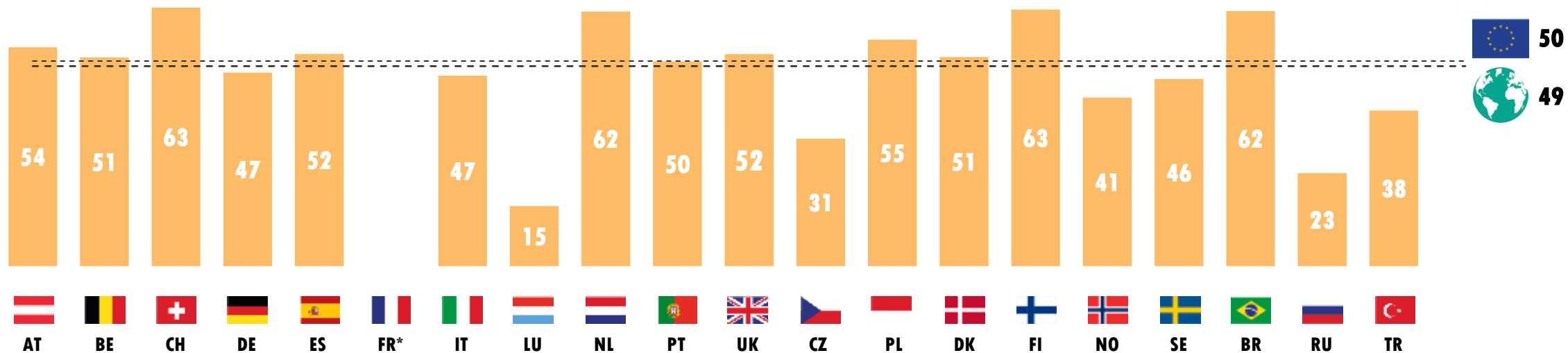


**The question asked for France is not comparable to other countries*

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

MOBILITY BUDGET CONSIDERED BY DRIVERS TO COMPLEMENT THEIR COMPANY VEHICLE

TOTAL Certainly or probably

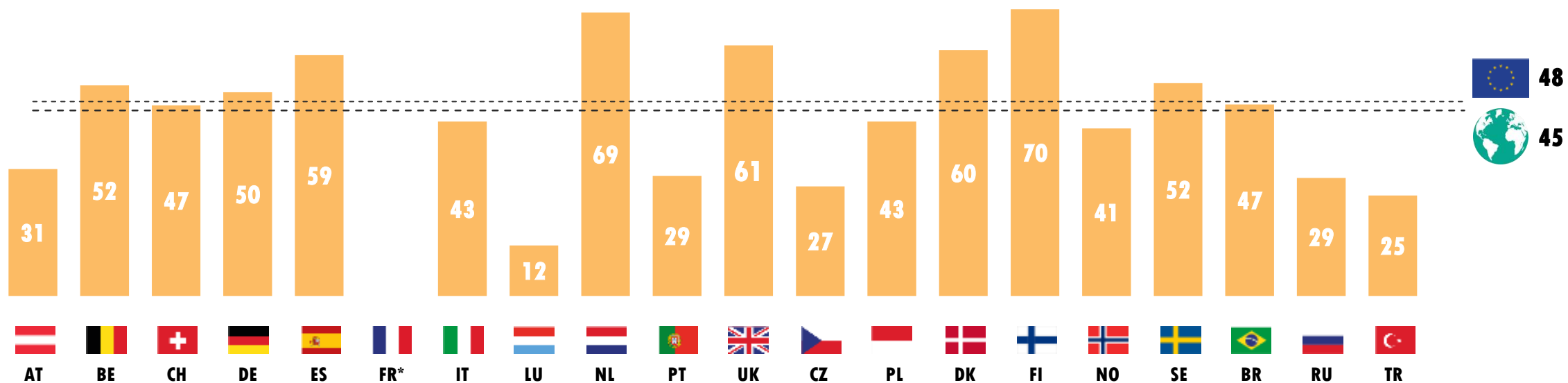


**The question asked for France is not comparable to other countries*

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

PRIVATE LEASE / SALARY SACRIFICE CONSIDERED BY DRIVERS TO COMPLEMENT THEIR COMPANY VEHICLE

TOTAL Certainly or probably

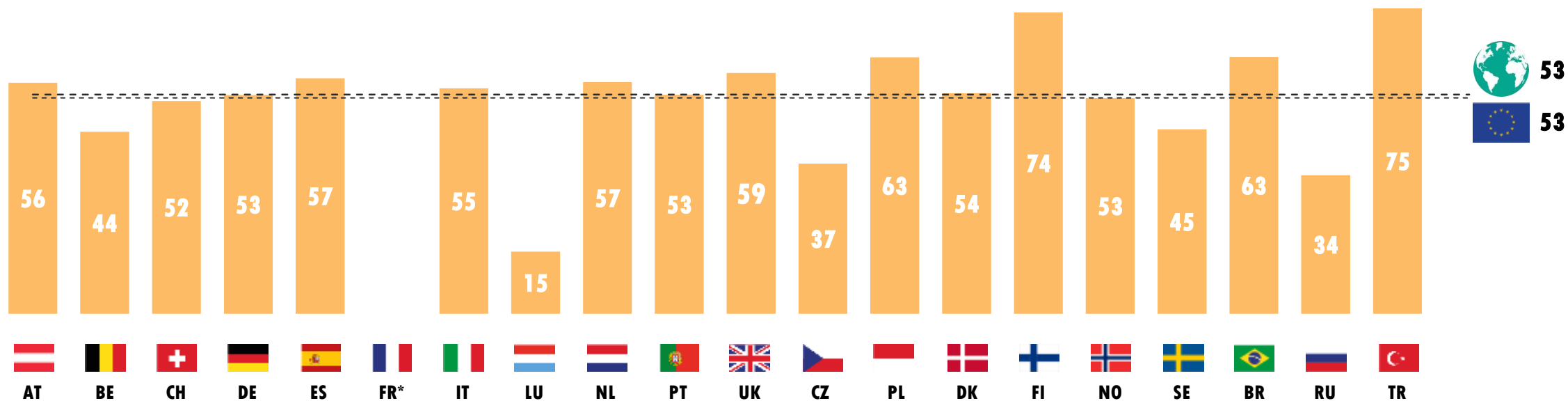


**The question asked for France is not comparable to other countries*

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

SHORT OR MID TERM RENTAL VEHICLE CONSIDERED BY DRIVERS TO COMPLEMENT THEIR COMPANY VEHICLE

TOTAL Certainly or probably



**The question asked for France is not comparable to other countries*

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

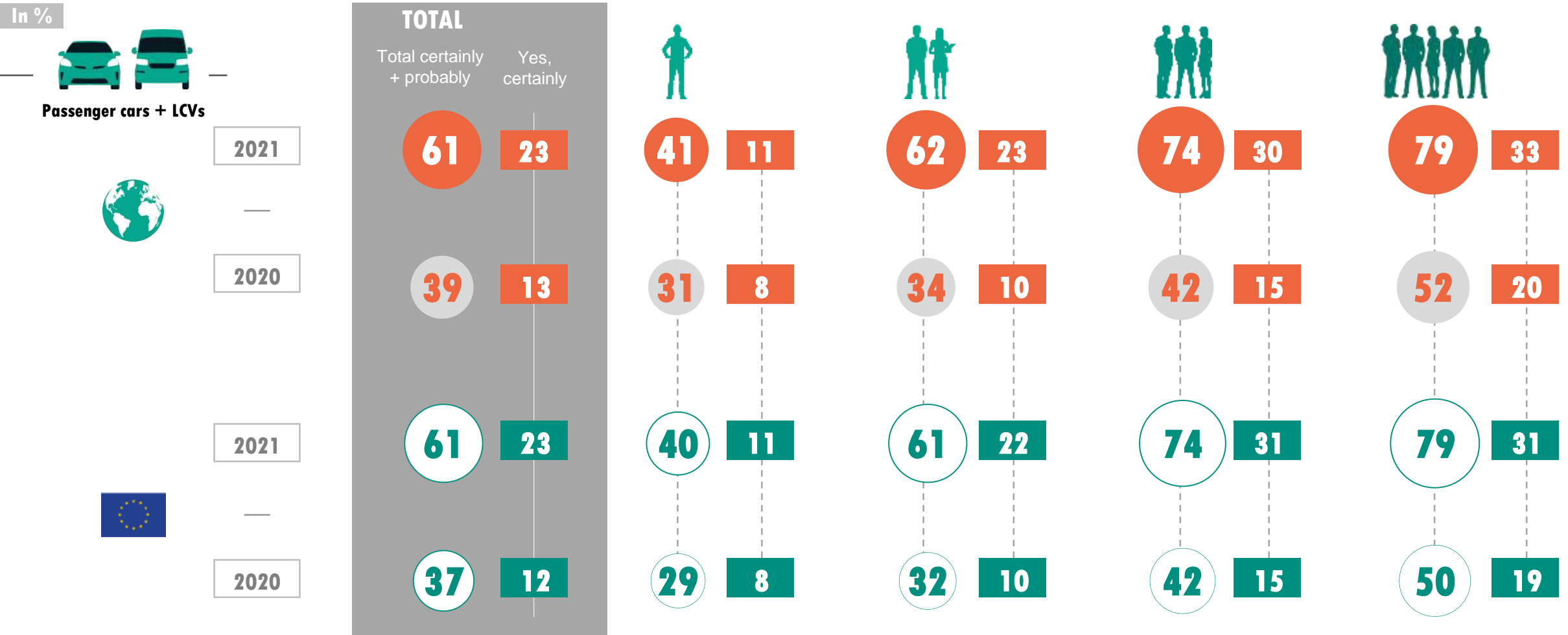
6

HOW ARE COMPANIES FINANCING THEIR FLEET?



INTENTION TO DEVELOP OPERATING LEASING

Proportion of companies having the intention to develop operating leasing



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

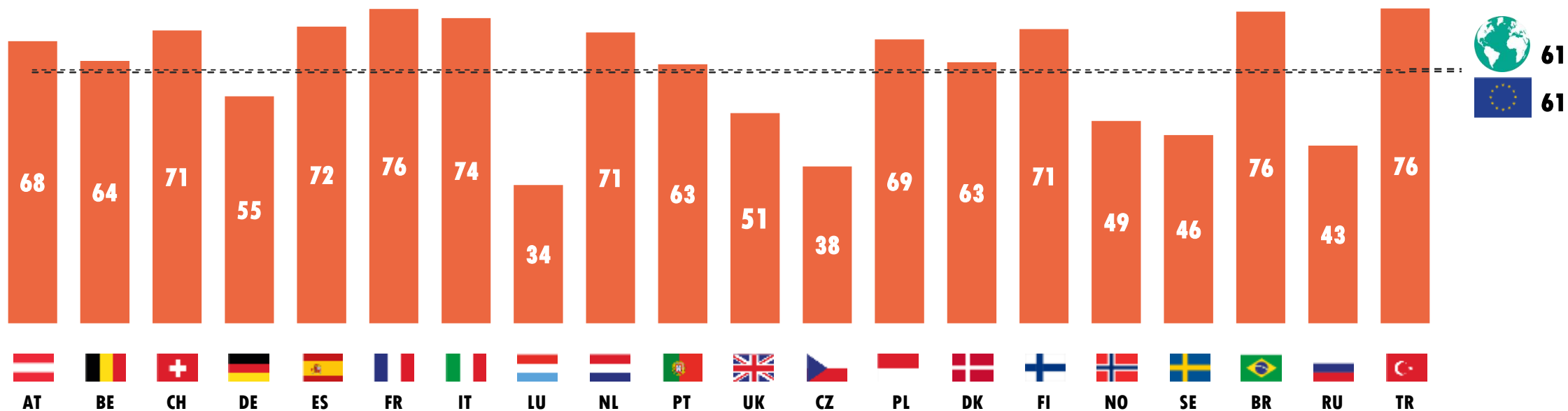
INTENTION TO DEVELOP OPERATING LEASING

Proportion of companies having the intention to develop operating leasing

In %



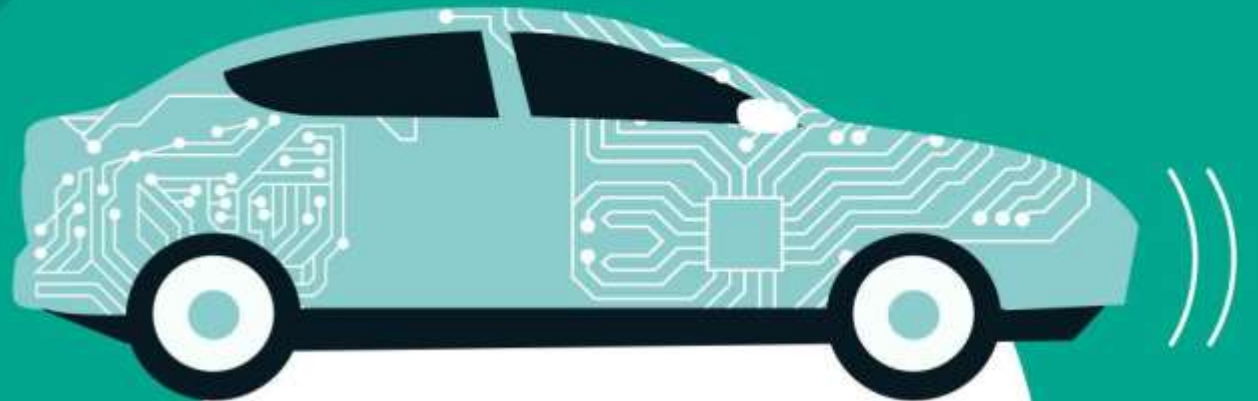
Passenger cars + LCVs



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

7

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



EQUIPMENT WITH CONNECTED VEHICLES IS WIDESPREAD.

1

- **6 companies out of 10 are currently equipped with connected vehicles, with an equal repartition between passenger cars and LCVs.**

However, there is still a gap between small and large companies:

- **While the smallest ones (less than 10 employees) have a rather limited usage of connected vehicles (31%)...**
- **... Connected vehicles are more widespread among medium and large companies (59% among companies from 10 to 99 employees and up to 82% among the largest ones).**

Luxembourg (29% of adoption) is far behind other countries.

2

- **Several aspects are fostering connected vehicles, regardless the type of vehicles:**

- **Security: vehicle security (50%) & driver's safety (41%)**
- **Efficiency and control: operational efficiency (42%) & avoid not allowed usages (41%)**
- **Savings: reduce fleet costs (40%)**

Besides, the new challenges met by fleet managers drive connected vehicles usage: reduce environmental impact (33%) and optimize car sharing (30%).

PROPORTION OF COMPANIES USING CONNECTED VEHICLES*

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

HOW TO READ THE RESULTS?

58% of companies with fleet use connected vehicles for all or part of their fleet.

Among companies owning passenger cars, 48% use connected vehicles for passenger cars, 41% use connected vehicles for benefit cars, 38% for tool cars.

Among companies owning LCVs, 49% use connected vehicles for LCVs.

In %



Passenger cars + LCVs

ALL VEHICLES



58



56



Passenger cars

48

46



Benefit cars

41

39



Tool cars

38

37



LCVs

49

48

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

Is your fleet connected thanks to a telematic tool?

Telematics enables transmission of data from a vehicle such as fuel consumption, driver behaviour and vehicle location;

Telematics do not include data transmission by the mean of the users' smartphones.

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

PROPORTION OF COMPANIES USING CONNECTED VEHICLES*

In %



Passenger cars + LCVs

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



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

Is your fleet connected thanks to a telematic tool?

Telematics enables transmission of data from a vehicle such as fuel consumption, driver behaviour and vehicle location;

Telematics do not include data transmission by the mean of the users' smartphones.

Basis: companies with corporate vehicles = 100%

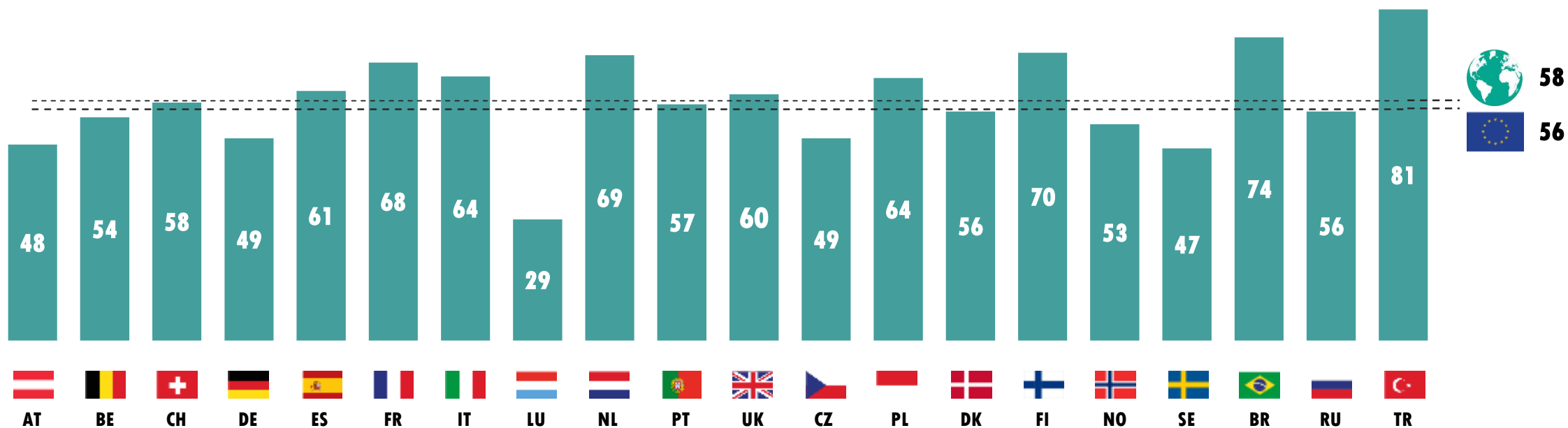
PROPORTION OF COMPANIES USING CONNECTED VEHICLES

In %



Passenger cars + LCVs

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 from a vehicle such as fuel consumption, driver behaviour and vehicle location;
 Telematics do not include data transmission by the mean of the users' smartphones.
 Basis: companies with corporate passenger cars / companies with corporate LCVs*

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

Focus on 1 to 99

In %

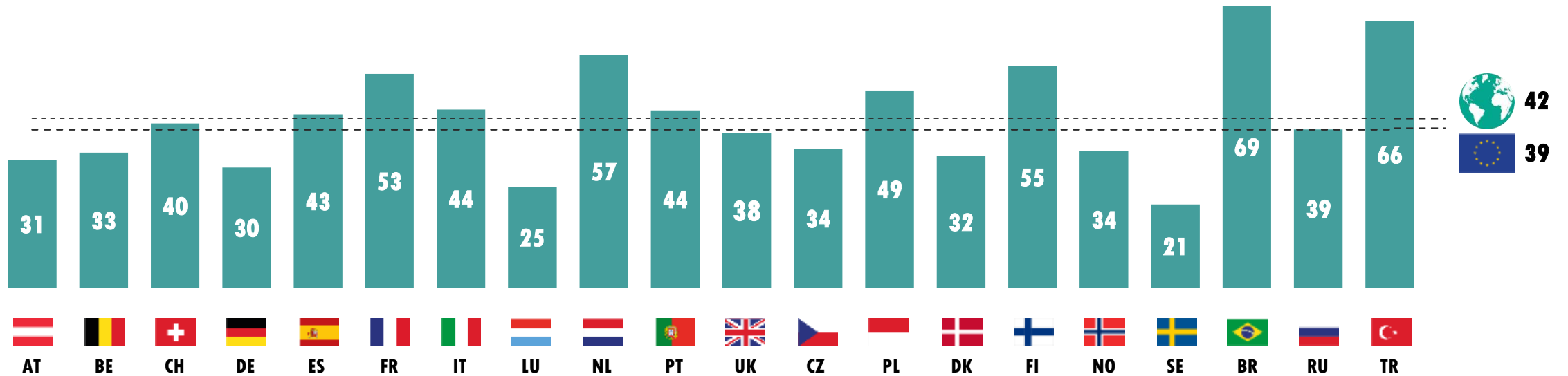


Passenger cars + LCVs

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 from a vehicle such as fuel consumption, driver behaviour and vehicle location;

Telematics do not include data transmission by the mean of the users' smartphones.

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

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

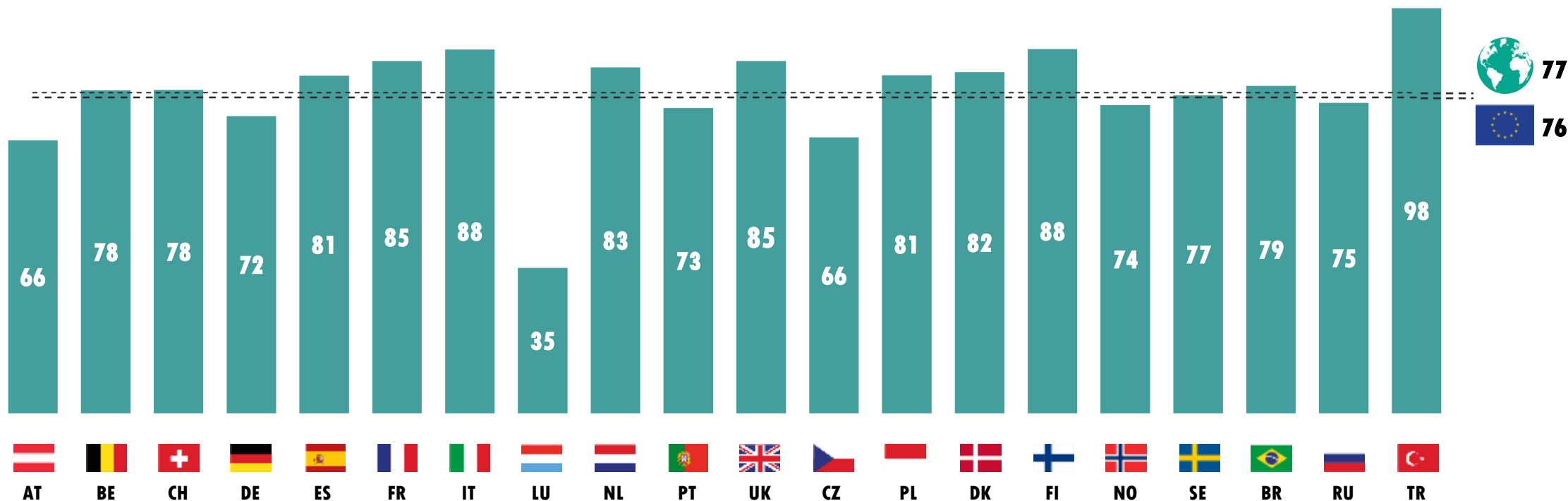
Focus on 100 and more

In %



Passenger cars + LCVs

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 from a vehicle such as fuel consumption, driver behaviour and vehicle location;

Telematics do not include data transmission by the mean of the users' smartphones.

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

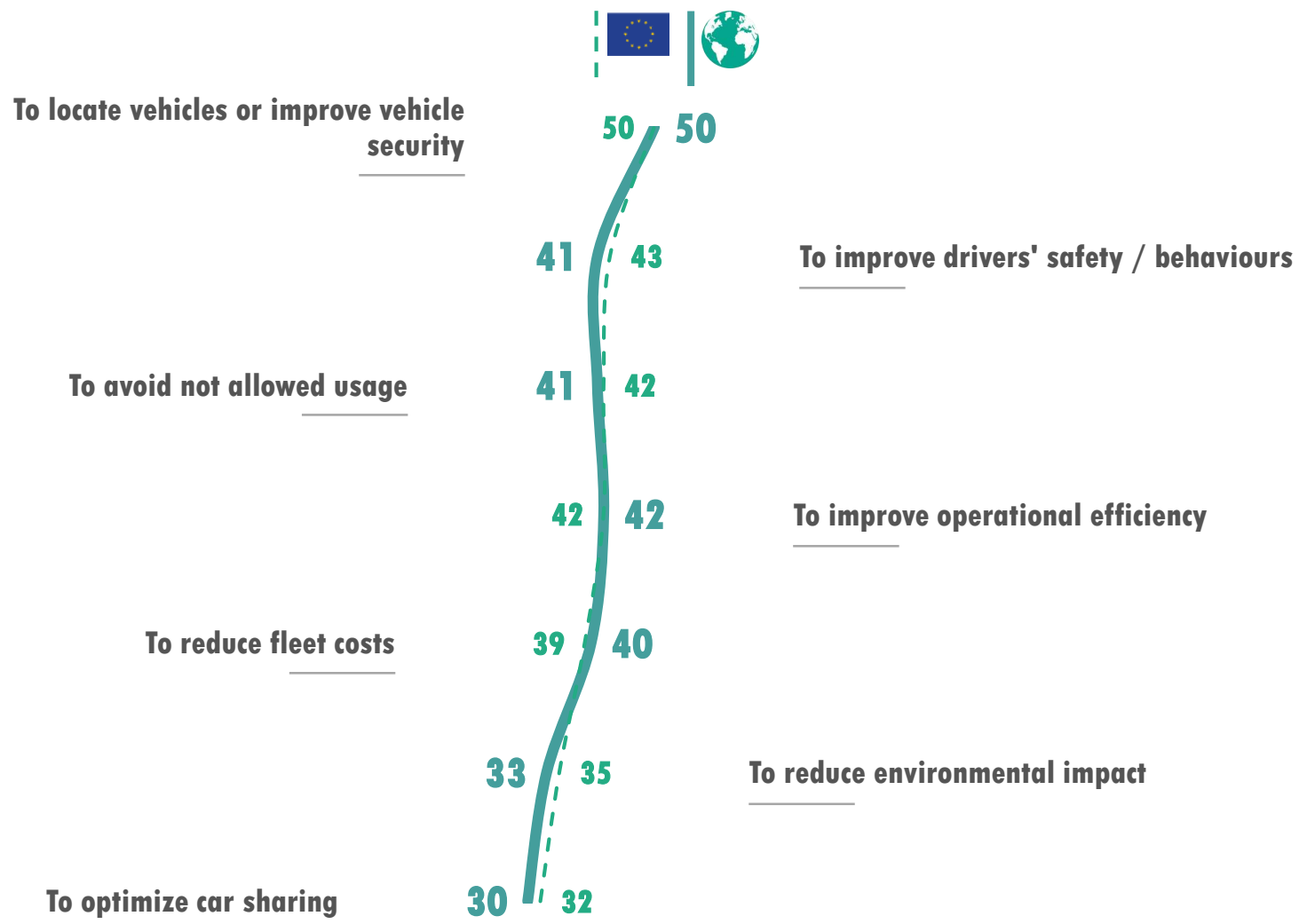
REASONS FOR USING CONNECTED VEHICLES*

All vehicles

In %



Passenger cars + LCVs

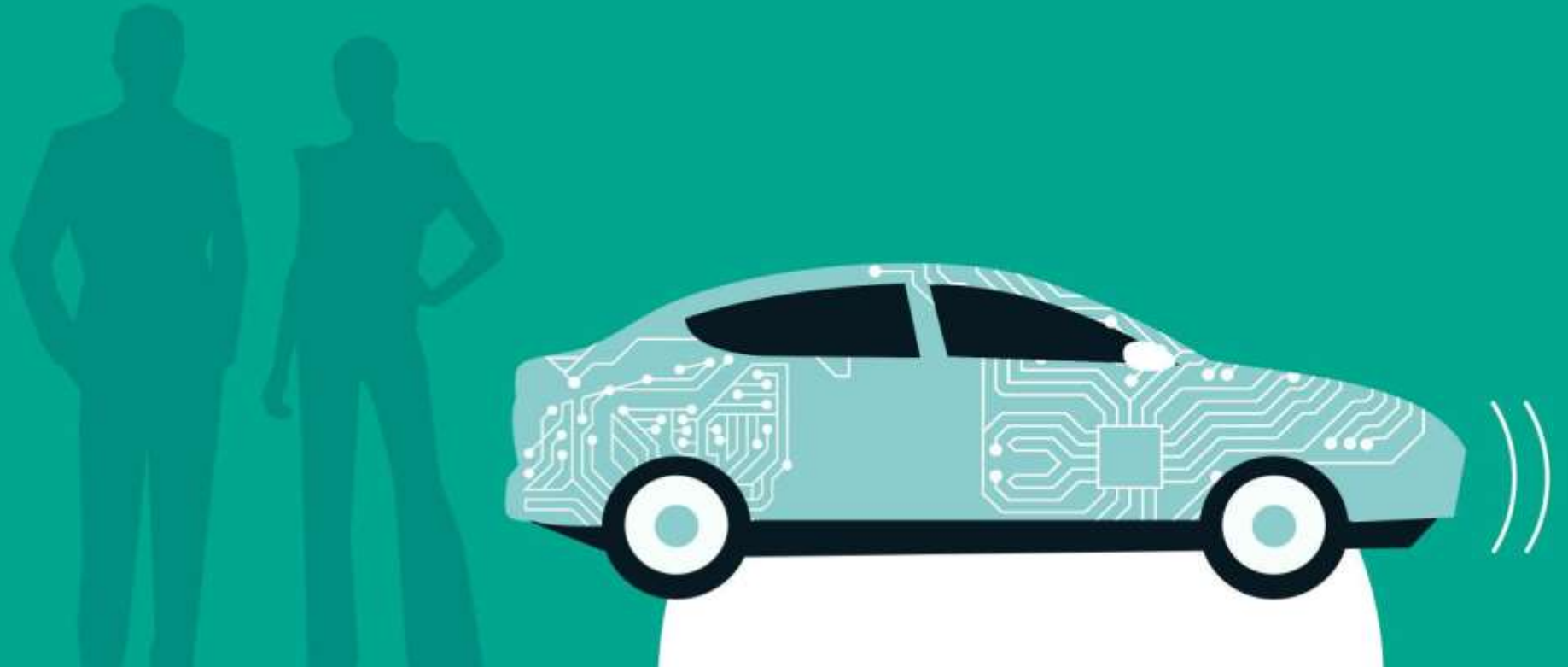


**This question has changed, no comparison vs previous year
What are the two main reasons why your fleet is connected by Telematics?
Basis: companies with connected vehicles thanks to Telematics*

7

CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY

A. PASSENGER CARS



PROPORTION OF COMPANIES USING CONNECTED VEHICLES

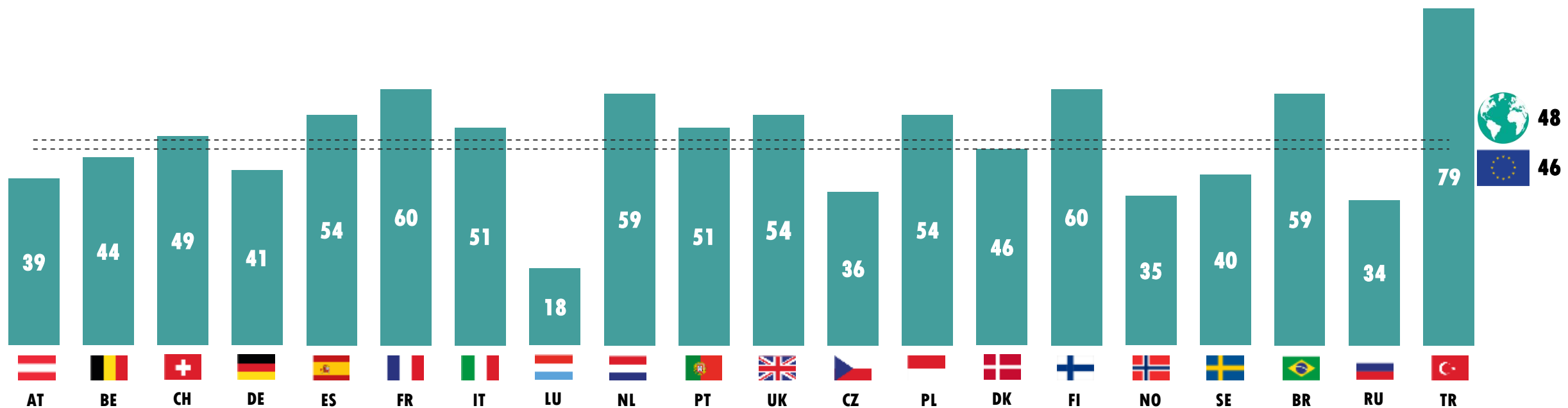
Passenger cars

In %



Passenger cars

PROPORTION OF COMPANIES HAVING IMPLEMENTED CONNECTED VEHICLES FOR THEIR PASSENGER CARS



Is your fleet connected thanks to a telematic tool?

Telematics enables transmission of data from a vehicle such as fuel consumption, driver behaviour and vehicle location;

Telematics do not include data transmission by the mean of the users' smartphones.

Basis: companies with corporate passenger cars

PROPORTION OF COMPANIES USING CONNECTED VEHICLES*

Passenger cars

In %



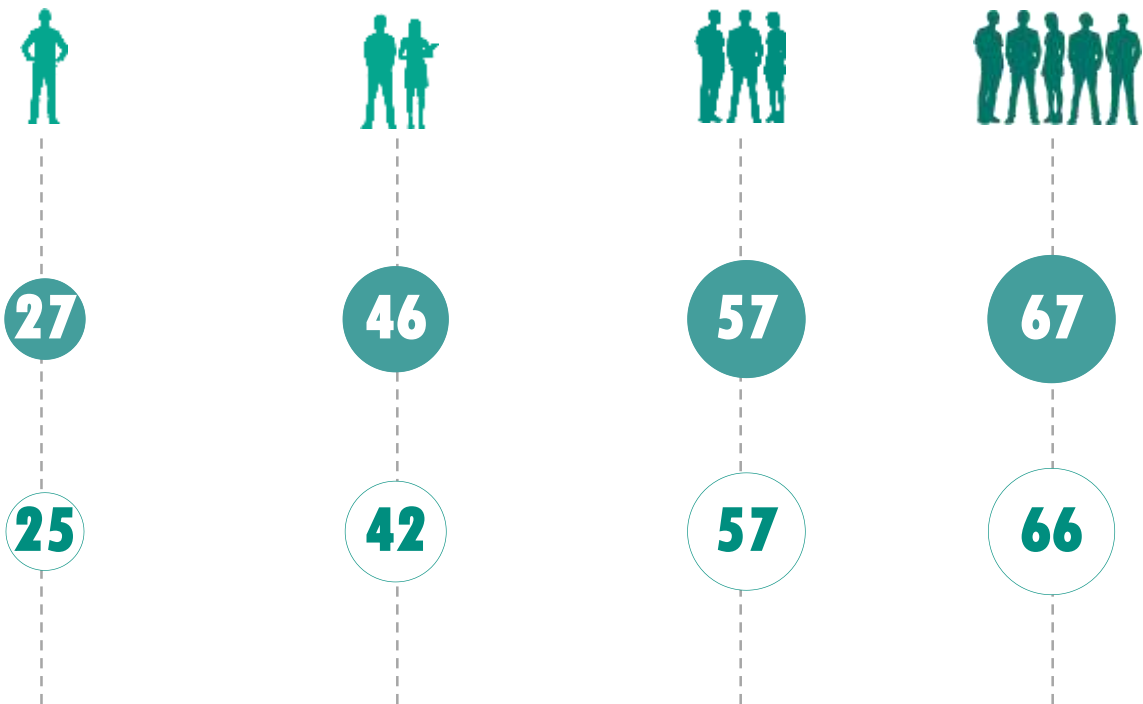
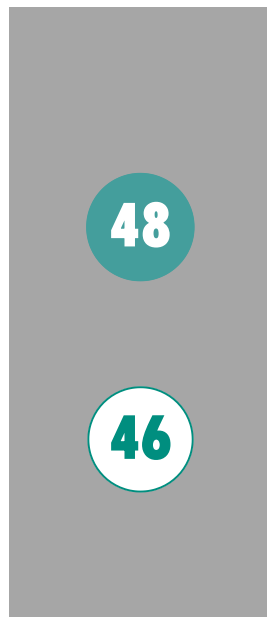
Passenger cars

HOW TO READ THE RESULTS?

Among companies owning passenger cars, 48% use connected vehicles.

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

Basis: companies with at least one passenger car in fleet



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

Is your fleet connected thanks to a telematic tool?

Telematics enables transmission of data from a vehicle such as fuel consumption, driver behaviour and vehicle location;

Telematics do not include data transmission by the mean of the users' smartphones.

Basis: companies with corporate passenger cars

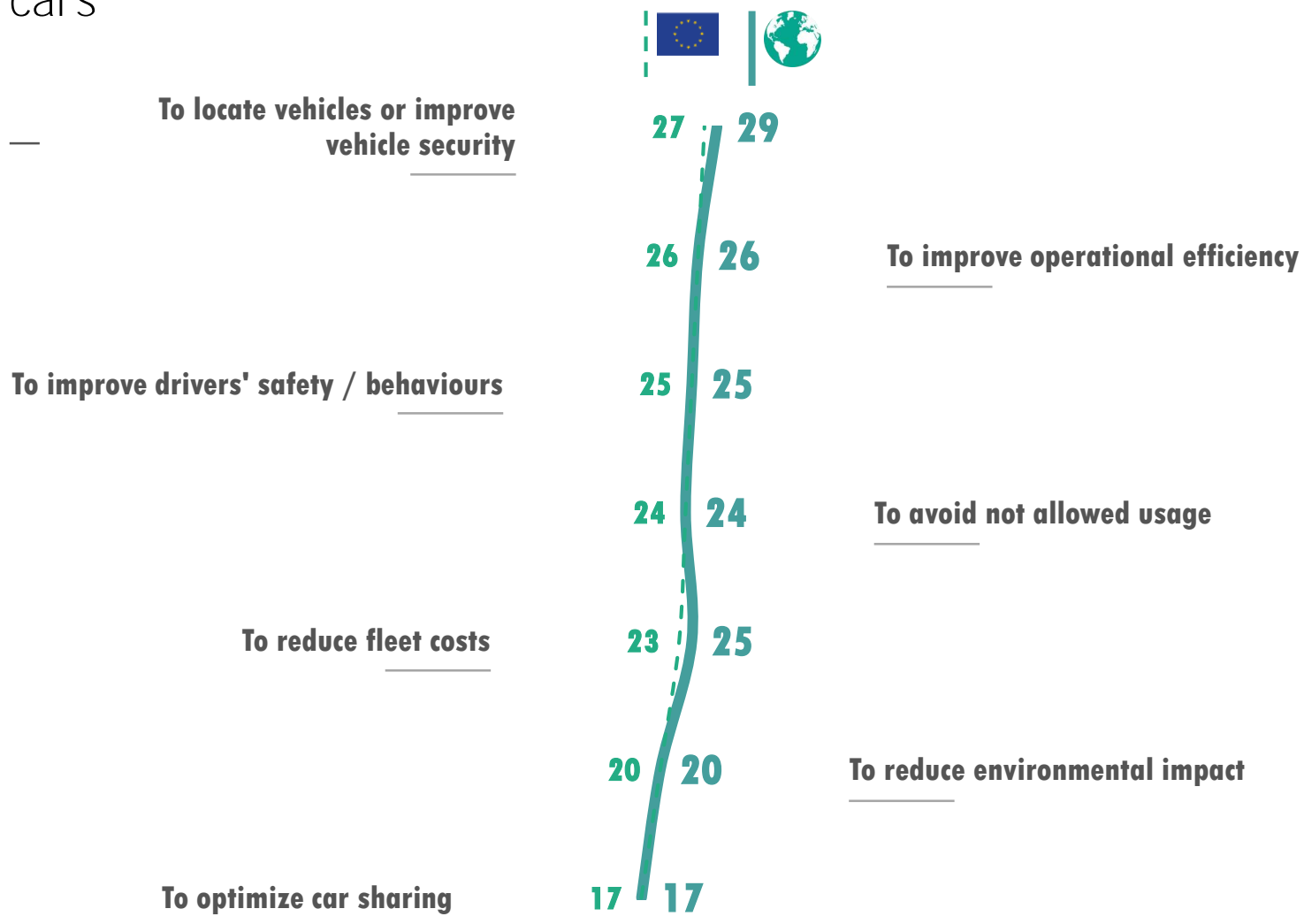
REASONS FOR USING CONNECTED VEHICLES*

Passenger cars

In %



Passenger cars

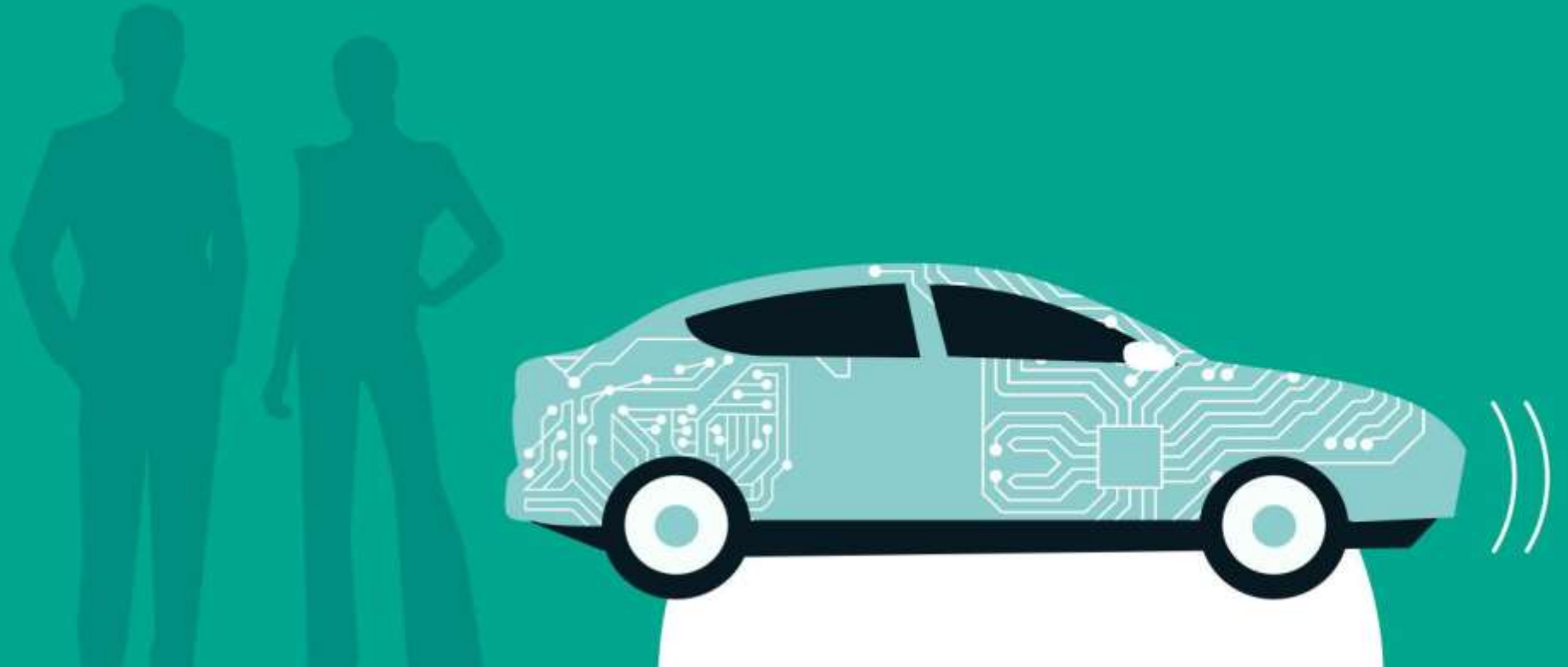


**This question has changed, no comparison vs previous year
What are the two main reasons why your fleet is connected by Telematics?
Basis: companies with connected vehicles thanks to Telematics*

7

CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY

B. BENEFIT CARS



PROPORTION OF COMPANIES USING CONNECTED VEHICLES

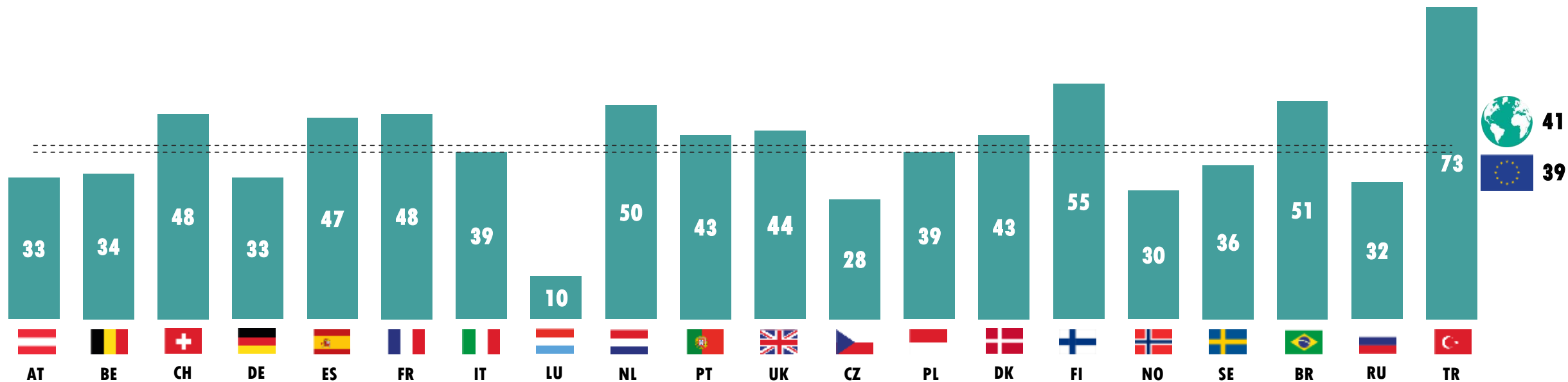
Benefit cars

In %



Benefit cars

PROPORTION OF COMPANIES HAVING IMPLEMENTED CONNECTED VEHICLES FOR THEIR BENEFIT CARS



Is your fleet connected thanks to a telematic tool?

Telematics enables transmission of data from a vehicle such as fuel consumption, driver behaviour and vehicle location;

Telematics do not include data transmission by the mean of the users' smartphones.

. Basis: companies with corporate passenger cars

PROPORTION OF COMPANIES USING CONNECTED VEHICLES*

Benefit cars

In %



Benefit cars

HOW TO READ THE RESULTS?

Among companies owning passenger cars, 41% use connected solutions for benefit cars.

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



Basis: companies with at least one passenger car in fleet

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

Is your fleet connected thanks to a telematic tool?

Telematics enables transmission of data from a vehicle such as fuel consumption, driver behaviour and vehicle location;

Telematics do not include data transmission by the mean of the users' smartphones.

Basis: companies with corporate passenger cars

REASONS FOR USING TELEMATICS AND CONNECTED VEHICLES*

Benefit cars

In %

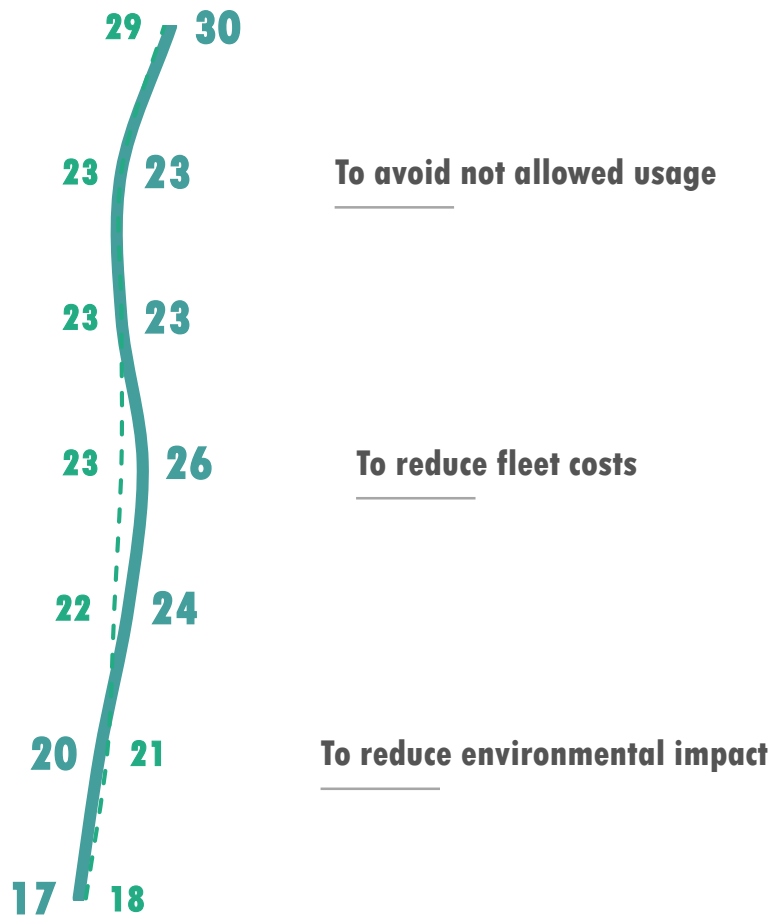


To locate vehicles or improve vehicle security

To improve drivers' safety / behaviours

To improve operational efficiency

To optimize car sharing

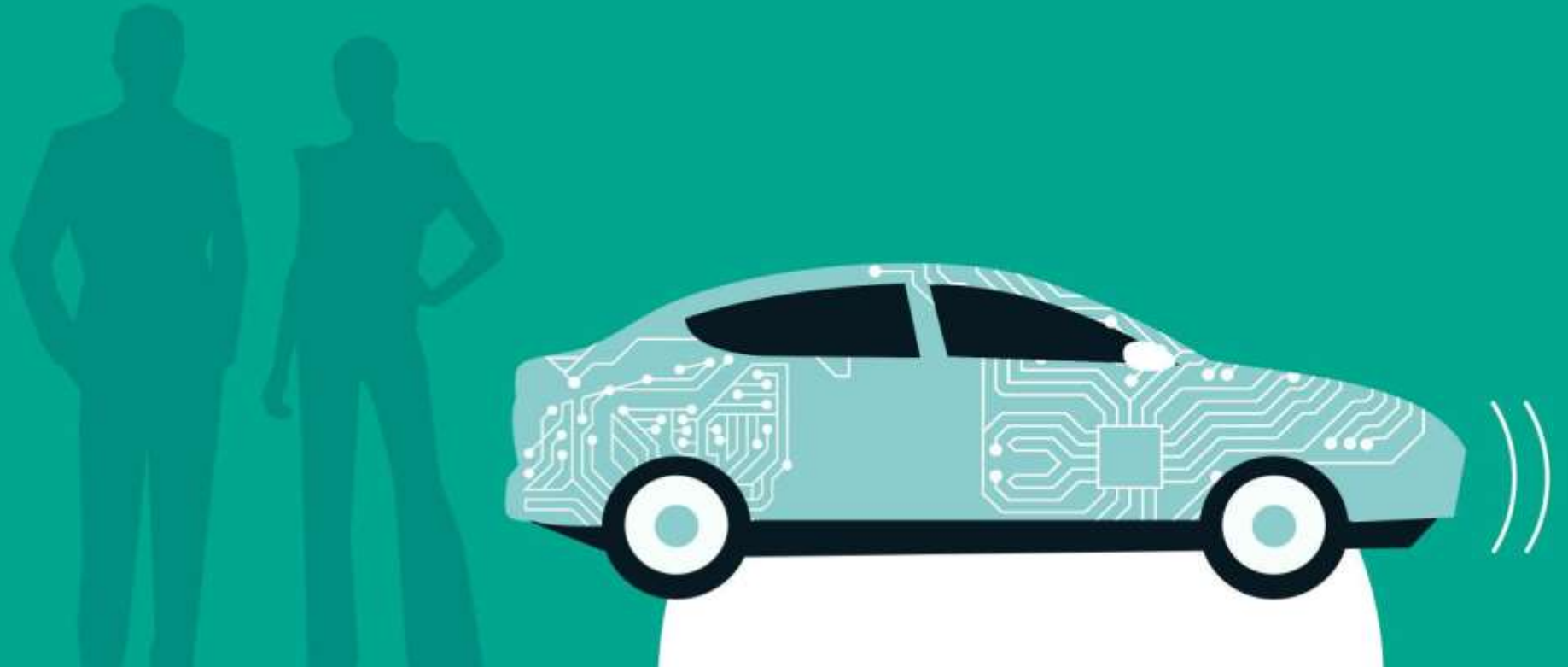


*This question has changed, no comparison vs previous year
What are the two main reasons why your fleet is connected by Telematics?
Basis: companies with connected vehicles thanks to Telematics

7

CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY

C. TOOL CARS



PROPORTION OF COMPANIES USING CONNECTED VEHICLES

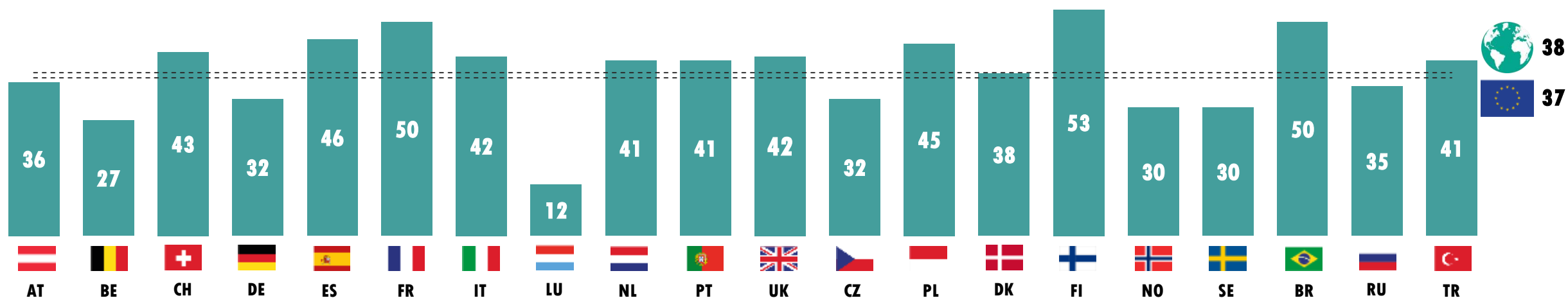
Tool cars

In %



Tool cars

PROPORTION OF COMPANIES HAVING IMPLEMENTED CONNECTED VEHICLES FOR THEIR TOOL CARS



Is your fleet connected thanks to a telematic tool?

Telematics enables transmission of data from a vehicle such as fuel consumption, driver behaviour and vehicle location;

Telematics do not include data transmission by the mean of the users' smartphones.

Basis: companies with corporate passenger cars

PROPORTION OF COMPANIES USING CONNECTED VEHICLES*

Tool cars

In %



Tool cars

HOW TO READ THE RESULTS?

Among companies owning passenger cars, 38% use connected solutions for tool cars

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

Basis: companies with at least one passenger car in fleet



TOTAL

38

37



19

17



35

34



48

48



55

55

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

Is your fleet connected thanks to a telematic tool?

Telematics enables transmission of data from a vehicle such as fuel consumption, driver behaviour and vehicle location;

Telematics do not include data transmission by the mean of the users' smartphones.

Basis: companies with corporate passenger cars

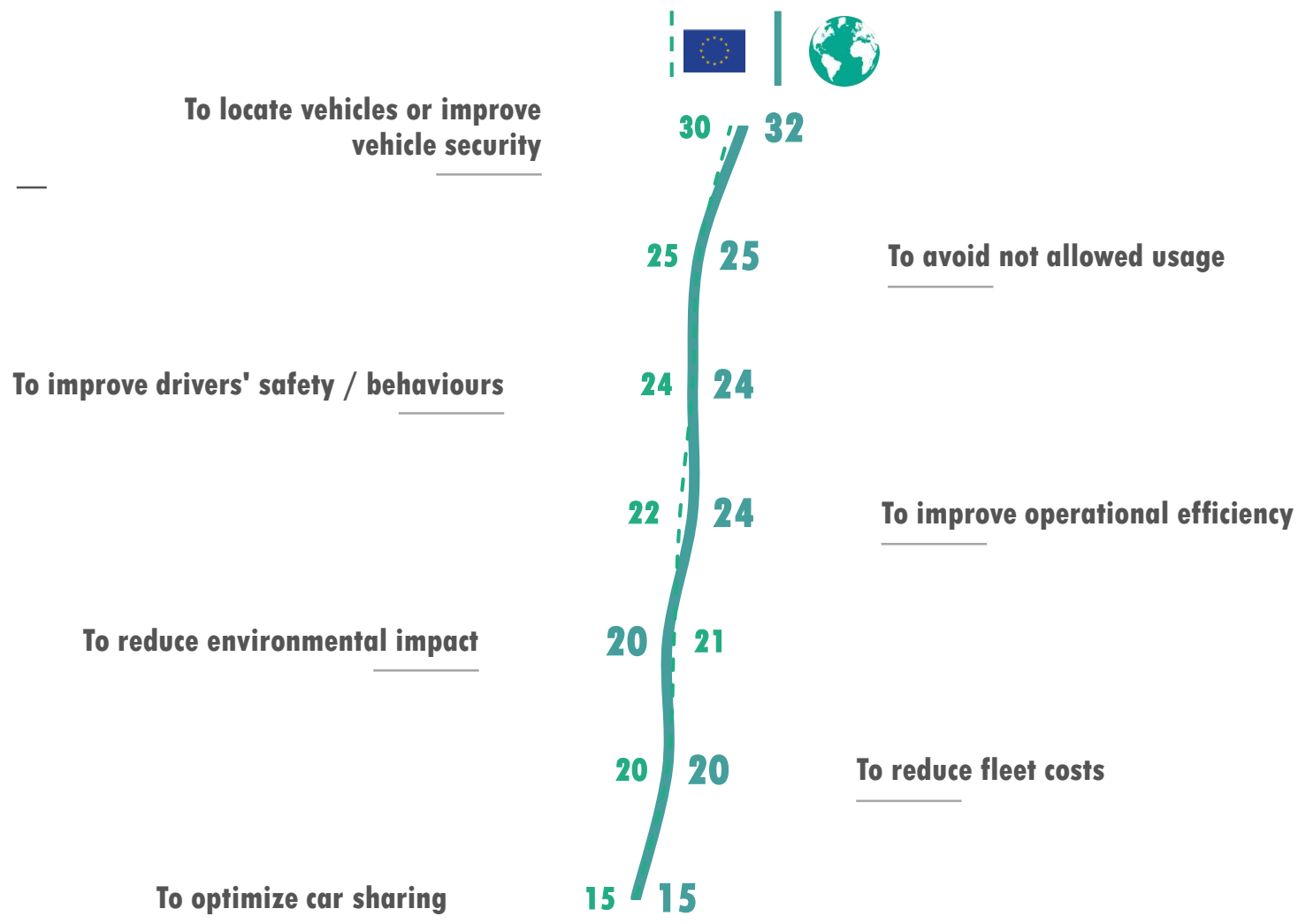
REASONS FOR USING CONNECTED VEHICLES

Tool cars

In %



Tool cars

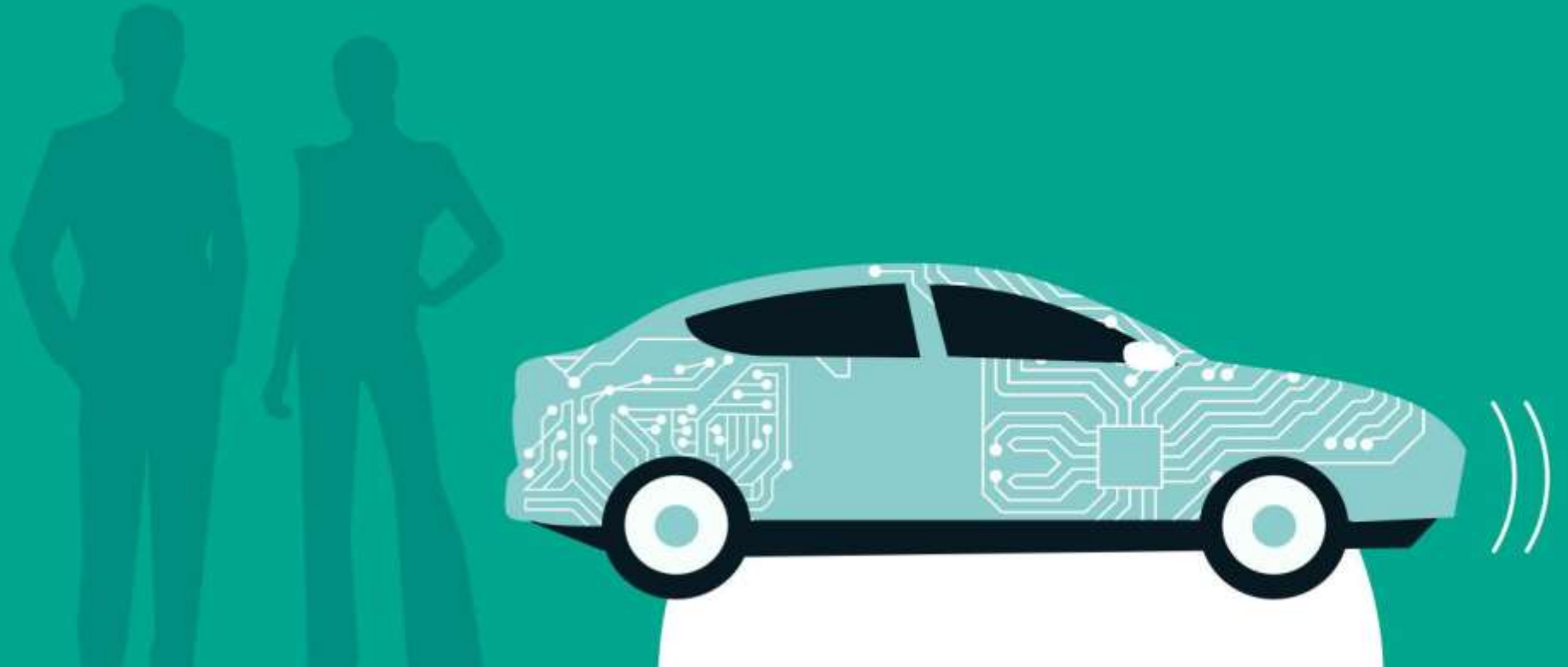


**This question has changed, no comparison vs previous year
What are the two main reasons why your fleet is connected by Telematics?
Basis: companies with connected vehicles thanks to Telematics*

7

CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY

D. LCVs



PROPORTION OF COMPANIES USING CONNECTED VEHICLES

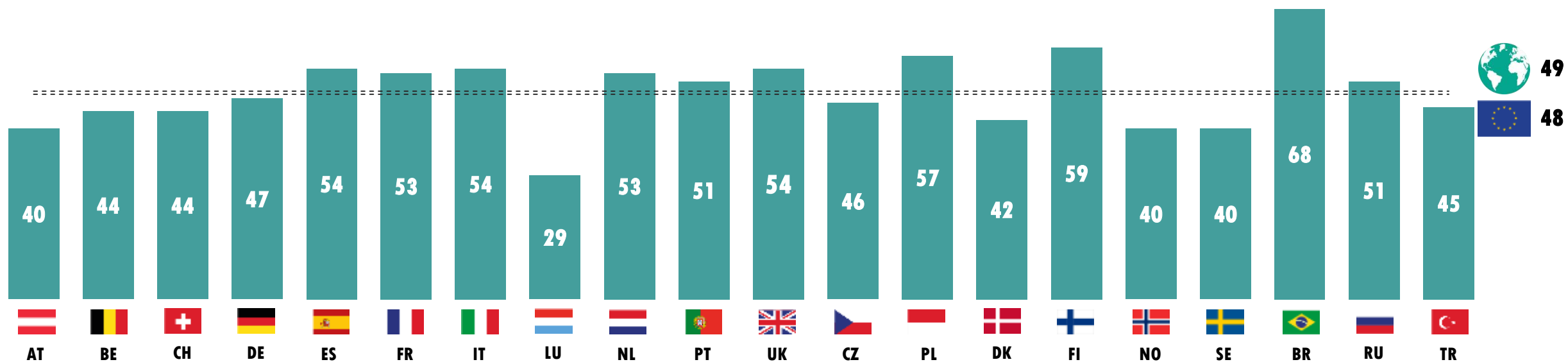
LCVs

In %



LCVs

PROPORTION OF COMPANIES HAVING IMPLEMENTED CONNECTED VEHICLES FOR THEIR LCVs



Is your fleet connected thanks to a telematic tool?

Telematics enables transmission of data from a vehicle such as fuel consumption, driver behaviour and vehicle location;

Telematics do not include data transmission by the mean of the users' smartphones.

Basis: companies with corporate LCVs

PROPORTION OF COMPANIES USING CONNECTED VEHICLES*

LCVs

In %



LCVs

HOW TO READ THE RESULTS?

Among companies owning LCVs, 49% use connected solutions for LCVs

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

Basis: companies with at least one LCV in fleet



TOTAL

49

48



27

24



47

45



58

58



62

62

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

Is your fleet connected thanks to a telematic tool?

Telematics enables transmission of data from a vehicle such as fuel consumption, driver behaviour and vehicle location;

Telematics do not include data transmission by the mean of the users' smartphones.

Basis: companies with corporate LCVs

REASONS FOR USING CONNECTED VEHICLES*

LCVs

In %



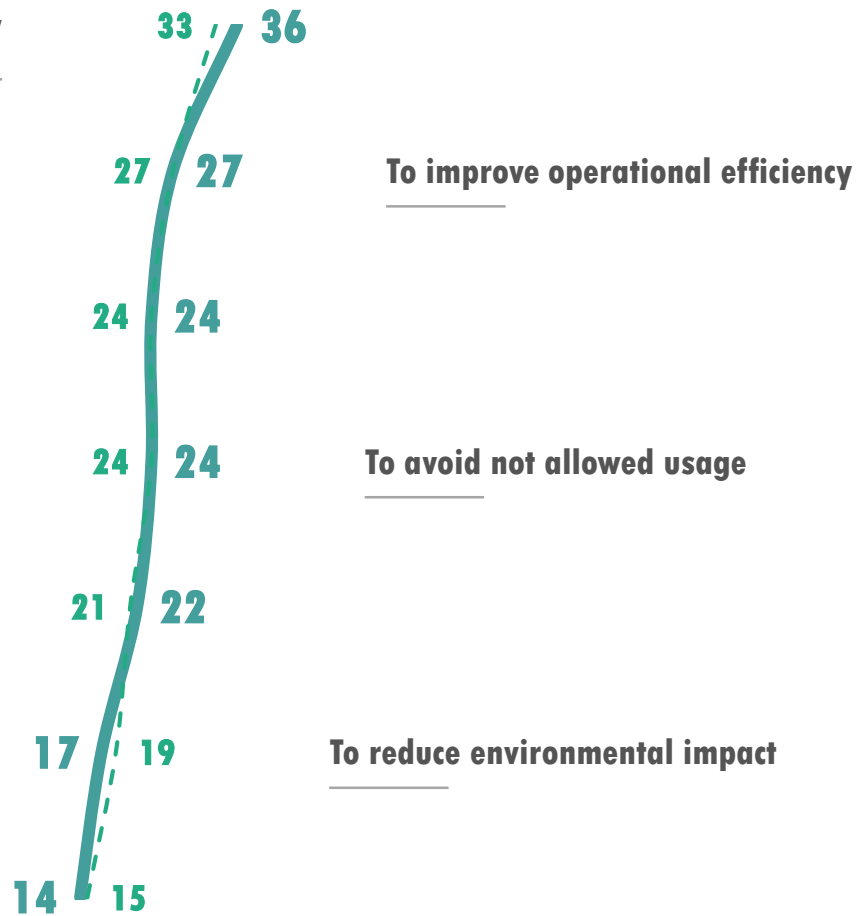
LCVs

To locate vehicles or improve vehicle security

To improve drivers safety / behaviours

To reduce fleet costs

To optimize car sharing



**This question has changed, no comparison vs previous year
What are the two main reasons why your fleet is connected by Telematics?
Basis: companies with connected vehicles thanks to Telematics*

THANK YOU

Contact: BENNATHAN YAËL
Yael.BENNATHAN@arval.com