

Arval Mobility
Observatory



EMPLOYEE MOBILITY SURVEY

2024 Report



Agenda

#

Key Global Insights

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Commuting trips

2

Business trips

3

MaaS applications

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The ideal transportation

5

Corporate mobility solutions and adoption

6

Importance of corporate mobility solutions for new hires

7

Expectations for mobility solutions

#

Contact

Executive Summary



For both commuting and business trips, car remains the dominant choice

71% of commuters are using an individual car most of the time

70% of business trips are done with a car, out of which 47% of employees use an individual car (company or personal), and 23% use car sharing.



Remote working has reached a peak, while the commuting times have increased compared to 2022

60% of employees are working remotely at least one day per week, which is stable vs 2022, and the average number of days working remotely is 1.7 (a 0.2 decrease compared to 2022).

42% of employees spend more than 30 minutes on the route from home to their offices, an increase of 4 points compared to 2022.



The ideal transportation mode should be flexible, fast, safe and close to home/work

45% or more of the employees are rating speed, proximity, flexibility, and safety as very important levers for both commuting and business trips,

50% of employees doing business trips mention safety, this becoming a top criteria in the ideal transportation mode. Price remains in top 5 priorities for commuting trips (40%)



The mobility services offered by companies have increased, leading to greater employee satisfaction

65% of companies offer at least one mobility solutions, an increase of 6 points (from 59%) compared to 2022.

50% of employees are satisfied with the corporate mobility offer, an increase of 5 points (from 45%) compared to 2022.



Corporate mobility solutions remain key levers in both talent attraction and employee retention

62% of employees declare mobility offerings are important when choosing a company to work for.

55% of employees anticipate that companies will enhance their mobility offer within the next 5 years

Key global insights

For both commuting and business trips, car remains the dominant choice

71% of commuters are using an individual car most of the time

70% of business trips are done with a car, out of which **47%** of employees use an individual car (company or personal), and **23%** use car sharing.

The decrease in the use of individual cars (from 49% in 2022 to 47% in 2022) is matched by an increase of usage of trains as means of transportation for business trips (from 30% in 2022 to 32% in 2024). Interestingly, in France trains are used for business trips by 42% of employees and a notable increase is observed also in the Netherlands (from 9% in 2022 to 16% in 2024)

Remote working has reached a peak, while the commuting times have increased compared to 2022

60% of employees are working remotely at least one day per week, which is stable vs 2022.

When it comes to the average number of days working remotely, they are **1.7** (a 0.2 decrease compared to 2022). The average shows a slight decline in Germany and more notably in Italy, where remote working was more widespread in 2022

42% of employees spend more than 30 minutes on the route from home to their offices, an increase of 4 points compared to 2022. This in the context in which the average distance has not changed meantime (59% employees living less than 20 km, and 41% less than 20 km)

Notably, France is seeing both an increase of distance (46% of employees living at more than 20 km from office, 35% more compared to 2022) and time to commute (46% declaring a commuting time higher than 30 minutes)

Key global insights

The ideal transportation mode should be flexible, fast, safe and close to home/work

Speed, proximity, flexibility, and safety are strong drivers for both commuting and business trips, all of them at over **45%** in the importance order.

For business trips, the top criteria is **safety**, with **50%** of employees mentioning it (an increase of 5 pts compared to 2022)

Following the top drivers, there are still differences in the ideal transportation mode between commuting and business trips

- Price is at a higher priority for commuting trips (40%)
- Comfort (41%) and cleanliness (35%) are still preferred for business travel

The mobility services offered by companies have increased, leading to greater employee satisfaction

65% of companies offer at least one mobility solutions, an increase of 6 points (from 59%) compared to 2022. Germany, France and Netherlands have caught up with Belgium.

The usage rate of the mobility solutions is at **78%**, with France (86%) and Belgium (83%) leading.

50% of employees are satisfied with the corporate mobility offer, an increase of 5 points (from 45%) compared to 2022.

This results are coming mostly from France (54%, increase of 12 points versus 2022), Belgium (63%, increase of 12 points versus 2022), and the Netherlands (74%, increase of 11 points versus 2022), where improvements to those offers have been most significant, compared to 2022.

Corporate mobility solutions remain key levers in both talent attraction and employee retention

62% of employees declare mobility offerings are important when choosing a company to work for.

This criteria is important for **72%** of people who plan to leave their jobs in the next 6 months

55% of employees anticipate that companies will enhance their mobility offer within the next 5 years

Employees mention the environmental impact and enhanced company image as main advantages they would get from further development of corporate mobility offers.

Objectives and methodology

Research Objectives

1. What are the current practices regarding employee mobility?
2. What do employees expect from their companies?
3. How can corporate mobility become a driver of employee attraction and retention?

Research Approach

2,900 Interviews in total



10-MINUTE ONLINE QUESTIONNAIRE
With the Ipsos panel



500



500



500



500



500



400



FIELDWORK PERIOD

May 20th to June 7th 2024



TARGET

EMPLOYEES
in private companies
with more than 100
employees



QUOTAS

**SOCIO-DEMOGRAPHIC
CRITERIA**
(gender, age, region)

DEFINITIONS

Commuting trip = trip from home to the place of work
Business trip = any trip occurring outside of the typical workplace
for a work purpose: client meeting, going on a seminar, a conference

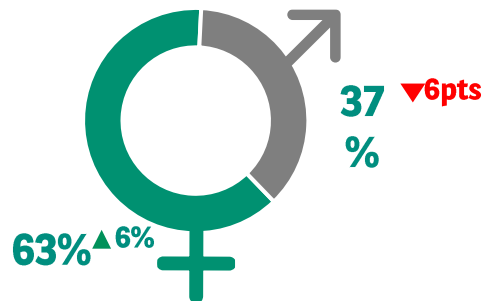
READING NOTES ABOUT THE REPORT

Some charts may not be perfectly equal to 100%. It is due to rounding.

Socio-demographic profile

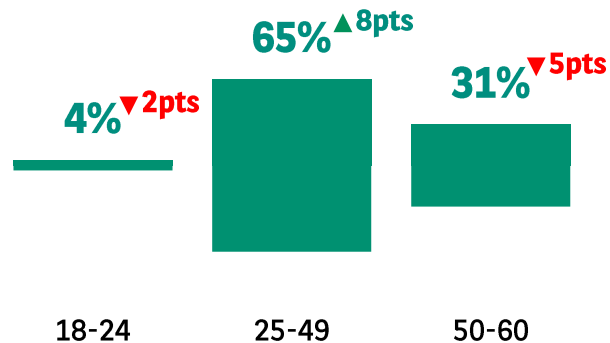
Basis: Total (N=2900)

GENDER



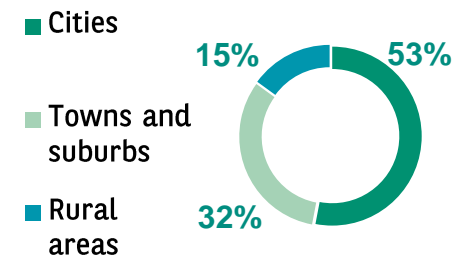
RESP_GENDER. Are you...?
Basis: Total

AGE



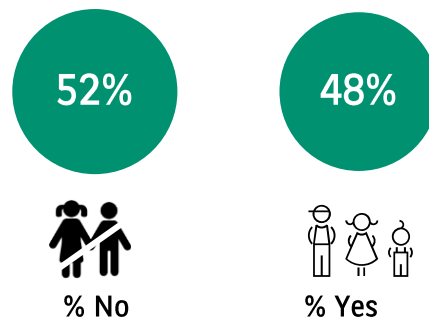
YEAR/MONTH. What is your date of birth?
Basis: Total

LIVING AREA



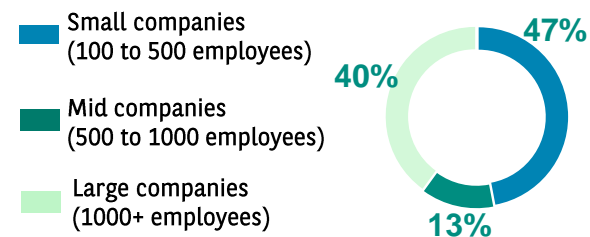
QMktSize. Where do you live?
Basis: Total

HAVE CHILDREN



KIDS02. How many children under the age of 18 are living in your household?
Basis: Total

COMPANY SIZE



NB_EMP. How many people are working in your company or organization?
Basis: Total

1.

**FOR COMMUTING, CAR REMAINS
PREDOMINANT
USE OF SHARED OR LEASED 2-
WHEELERS REMAINS LIMITED**



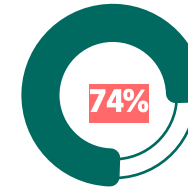
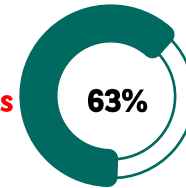
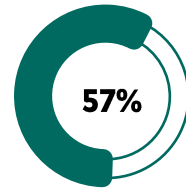
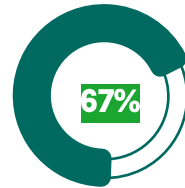
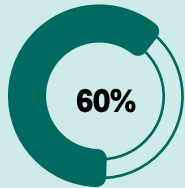
Remote working has become common practice for more than half of employees overall.

The average is 1 to 2 days of remote work per week. The average shows a slight decline in Germany and more notably in Italy, where remote working was more widespread in 2022.

NUMBER OF DAYS WORKING REMOTELY

Basis : total (N=2900)

At least one day working remotely
(Total basis)



Average number of day working remotely
(Total basis)

1,7
▼0,2 pts

2,1
▼0,3 pts

1,6

1,3

1,7
▼0,4 pts

1,7

2,0

Average number of day working remotely among remote workers
(Remote workers)

2,9
▼0,3 pts

3,1
▼0,5 pts

3,0

2,3

3,2

2,7

2,7

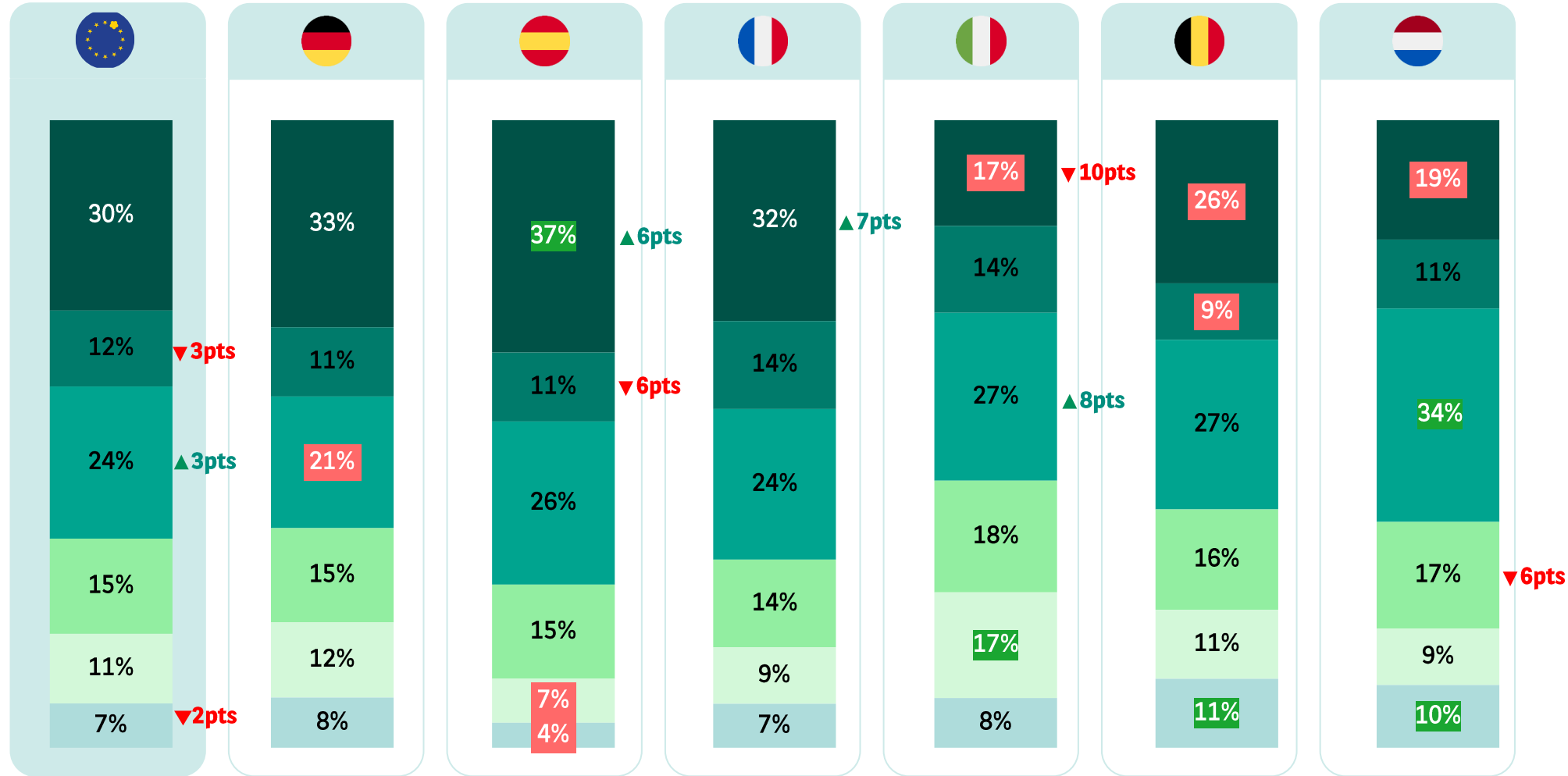
▼11pts

Most workplaces are located in urban areas, with a significant difference in Italy compared to the other countries and 2022 results.

WORKPLACE LOCATION

Basis : total (N=2900)

- In the downtown area of a large city
- In the downtown area of a mid-sized city
- On the outskirts of a large city
- On the outskirts of a mid-sized city
- In a small city
- In a rural area

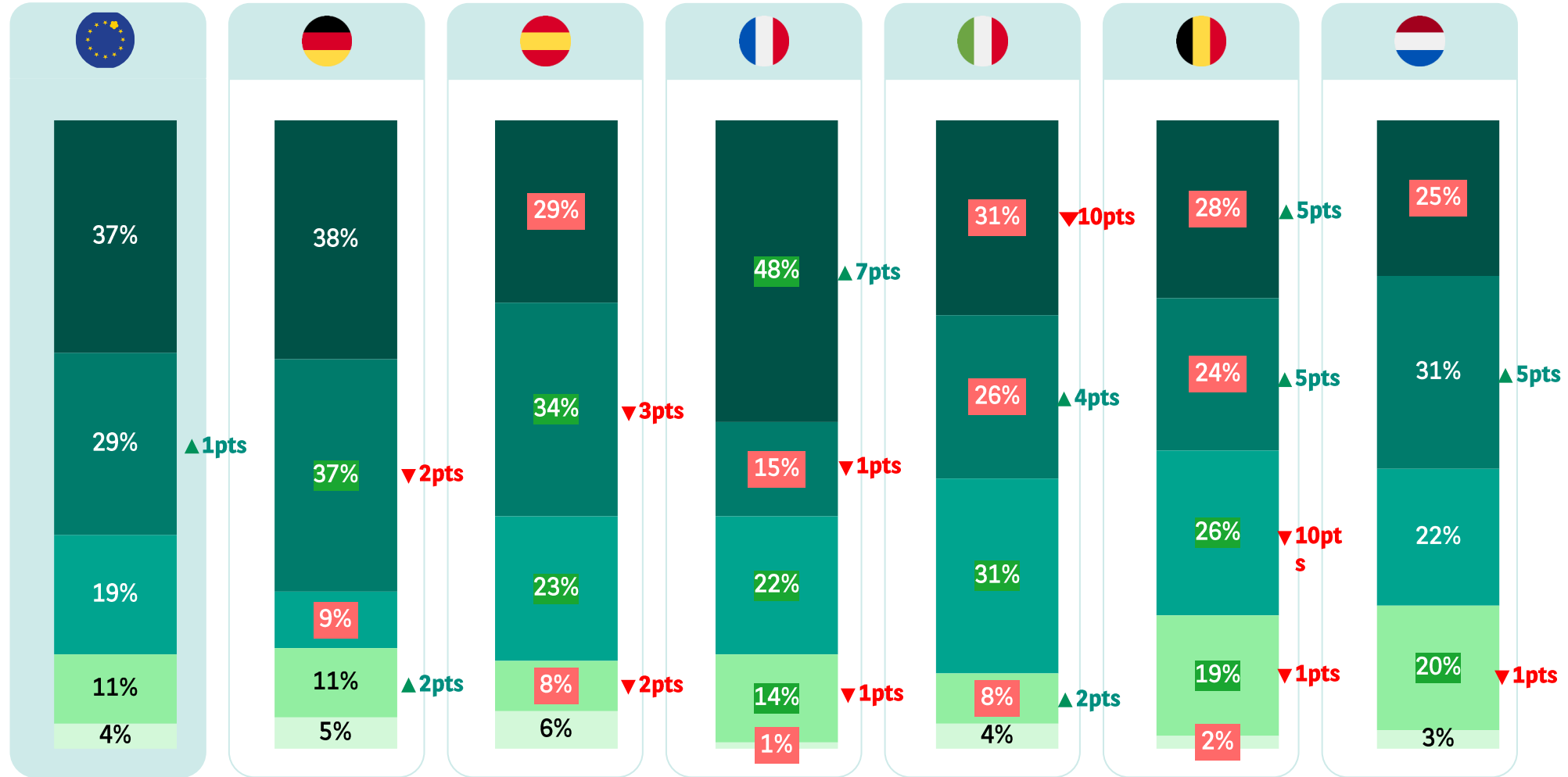


Individual and shared offices remain the predominant workspace setup, particularly in Germany. Open spaces are more common in other countries.

TYPE OF OFFICE

Basis : total (N=2900)

- An individual office
- A shared office
- An open space
- A flex office / no dedicated workspace
- Currently working at home full time

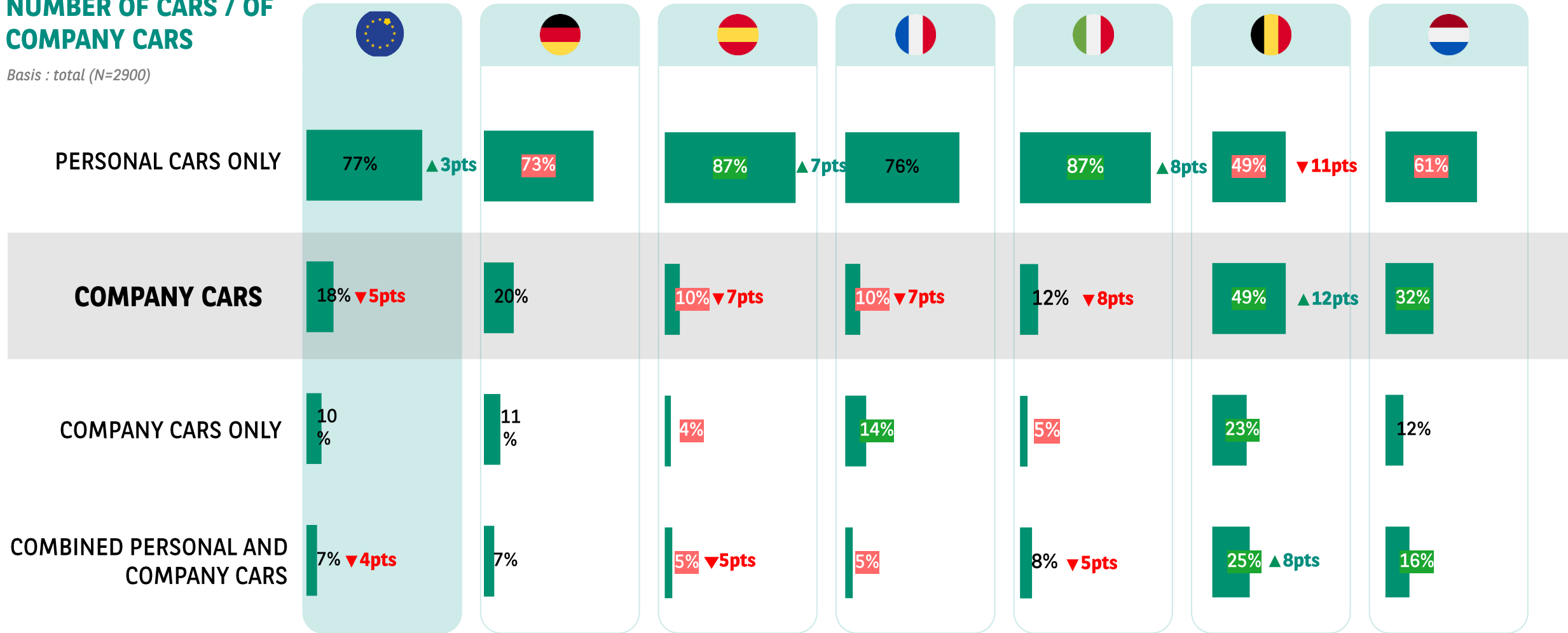


A6. In your company offices, do you work in ...?

The use of company cars has increased in Belgium, with a direct impact in the use of personal cars, as opposed to Spain, France and Italy.

NUMBER OF CARS / OF COMPANY CARS

Basis : total (N=2900)

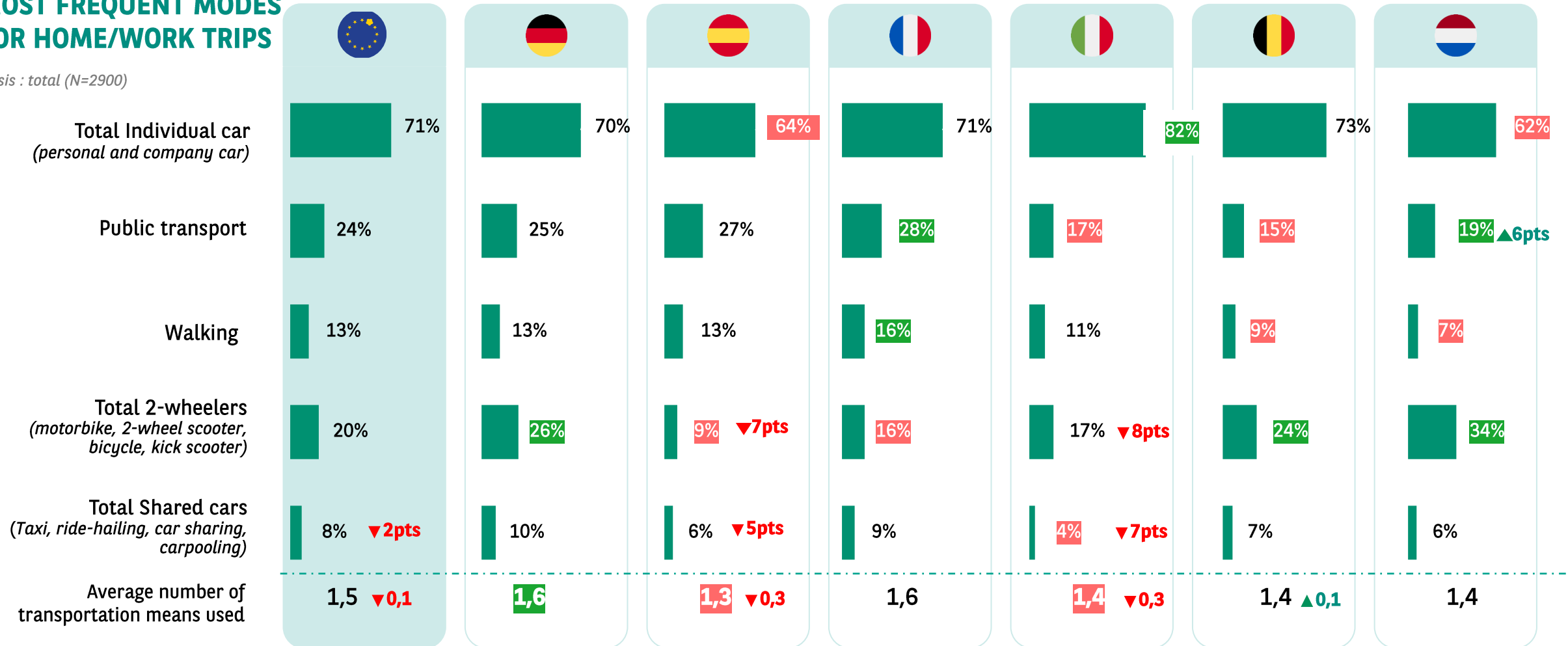


Individual car remains the dominant commuting mode.

Public transport use is on the rise in the Netherlands; Spain and Italy are seeing a decline in employees using 2-wheelers and shared cars.

MOST FREQUENT MODES FOR HOME/WORK TRIPS

Basis : total (N=2900)



Among 2-wheelers users, shared services are not widespread, except in Spain and France, where 15% to 19% of 2-wheelers users use at least one such service. Overall, a vast majority of 2-wheelers are personally owned and kept at home – except in France, where 17% of users rent it.

2-WHEELERS: OWNED / LEASED / RENTED

Basis : User of 2-wheelers (N=597)

Reminder



Users of 2-wheelers

20%

26%

9% ▼7pts

16%

17% ▼8pts

24%

34%

New question

At least 1 in shared service

8%

5%

15%

19%

5%

4%

5%

At least 1 at home

95%

97%

85%

89%

97%

98%

99%

New question

Basis : User of 2-wheelers and have it at home (N=571)

At least one personally owned

92%

91%

98%

86%

99%

92%

96%

At least one personally rented

7%

6%

2%

17%

3%

3%

4%

At least one leased by their company

5%

7%

0%

2%

1%








6%

2%

Overall, the choice of transportation mode is mainly driven by speed, followed by comfort (which has gained importance this year in France), and ease of access. Flexibility and price have also become increasingly important factors.

REASONS OF CHOICE - TOP 5

Basis : does home/work trips
(N=2847)

| |  |  |  |  |  |  |  |
|----|---|---|---|---|---|---|---|
| #1 | The quickest trip (40%) | The quickest trip (45%) | The quickest trip (39%) | The quickest trip (37%) | The trip is more comfortable (39%) | The quickest trip (40%) | The quickest trip (49%) |
| #2 | The trip is more comfortable (33%) ▲4pts | The trip is more comfortable (38%) | The trip is more comfortable (30%) | The trip is more comfortable (26%) ▲9pts | The quickest trip (34%) | It's easy to access it from home and work (30%) | The trip is more comfortable (30%) |
| #3 | It's easy to access it from home and work (27%) | I can be flexible with my hours (35%) | It's easy to access it from home and work (28%) | It's easy to access it from home and work (24%) | I can be flexible with my hours (25%) | My company is paying / participating (30%) | It's the most direct trip (28%) |
| #4 | I can be flexible with my hours (27%) ▲4pts | It's easy to access it from home and work (31%) | The cheapest trip (21%) | It's the most direct trip (23%) | There is no other transportation option (20%) | The trip is more comfortable (24%) | I can be flexible with my hours (27%) |
| #5 | The cheapest trip (22%) ▲4pts | The cheapest trip (27%) ▲7pts | It's the most direct trip (20%) | There is no other transportation option (23%) | It's the most direct trip (19%) | It's the most direct trip (24%) | The cheapest trip (26%) |

A10. What are all the reasons why you selected those transportation modes instead of others to go from your home to your workplace?

X% / X% significantly higher / lower vs. all countries
▲ / ▼ significant positive / negative evolution vs 2022

2.

FOR BUSINESS TRIPS, CARS AND TRAINS REMAIN THE DOMINANT MODES OF TRANSPORT



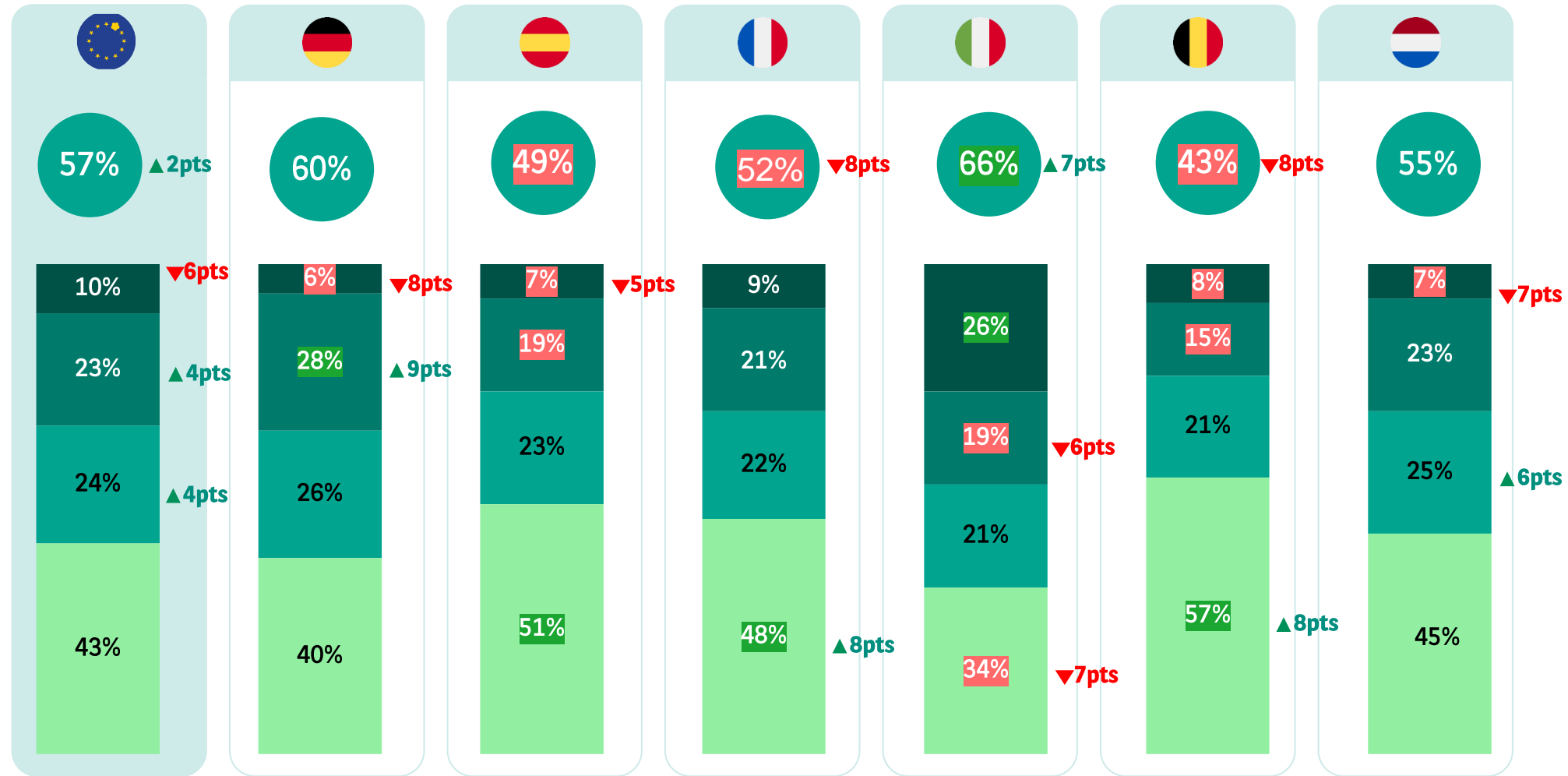
Business trips have generally become less frequent, except for Italy and are significantly less frequent in Belgium, France and Spain

BUSINESS TRIPS FREQUENCY

Basis : total (N=2900)

DOES BUSINESS TRIPS

- At least once a week
- Occasionally (several times or once a month, once every 2/3 months)
- Twice a year or less often
- Never

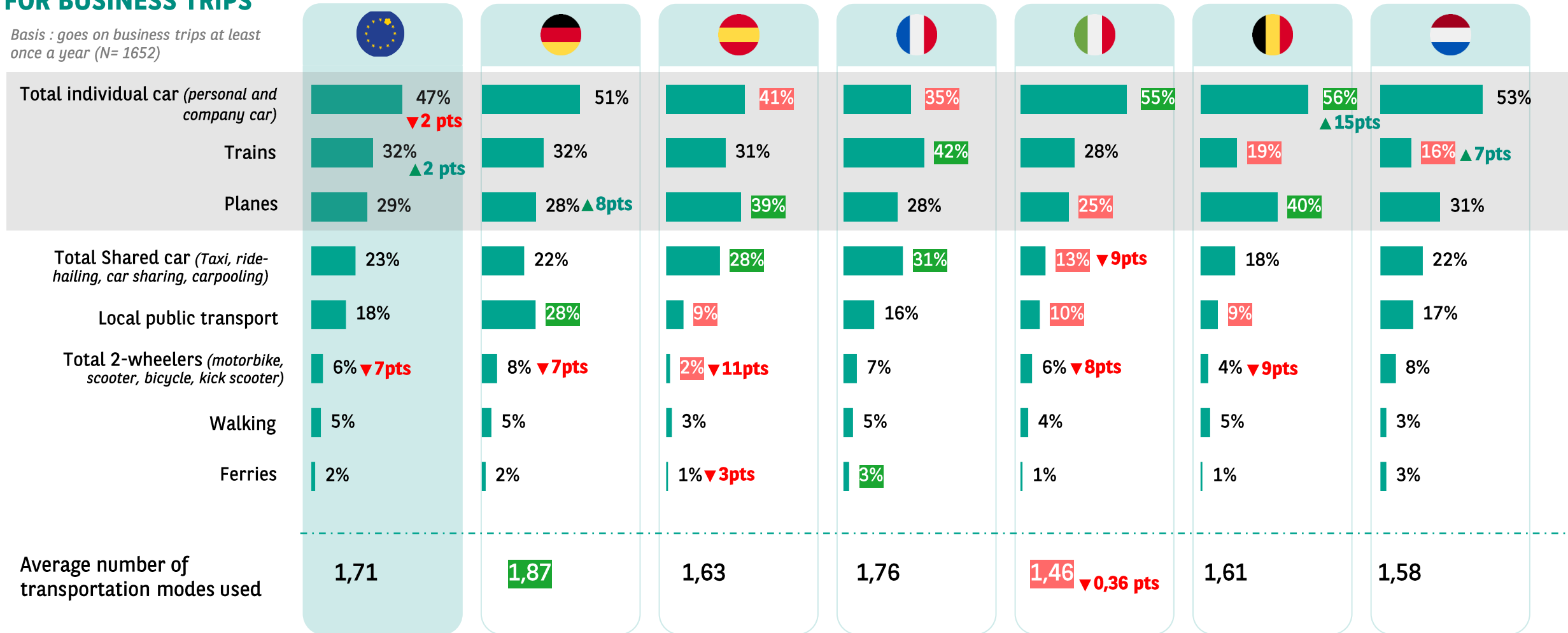


A16. How often do you personally go on business trips?

For business trips, cars and trains remain the dominant modes of transport, although a preference for planes persists in Belgium.

MOST FREQUENT MODES FOR BUSINESS TRIPS

Basis : goes on business trips at least once a year (N= 1652)

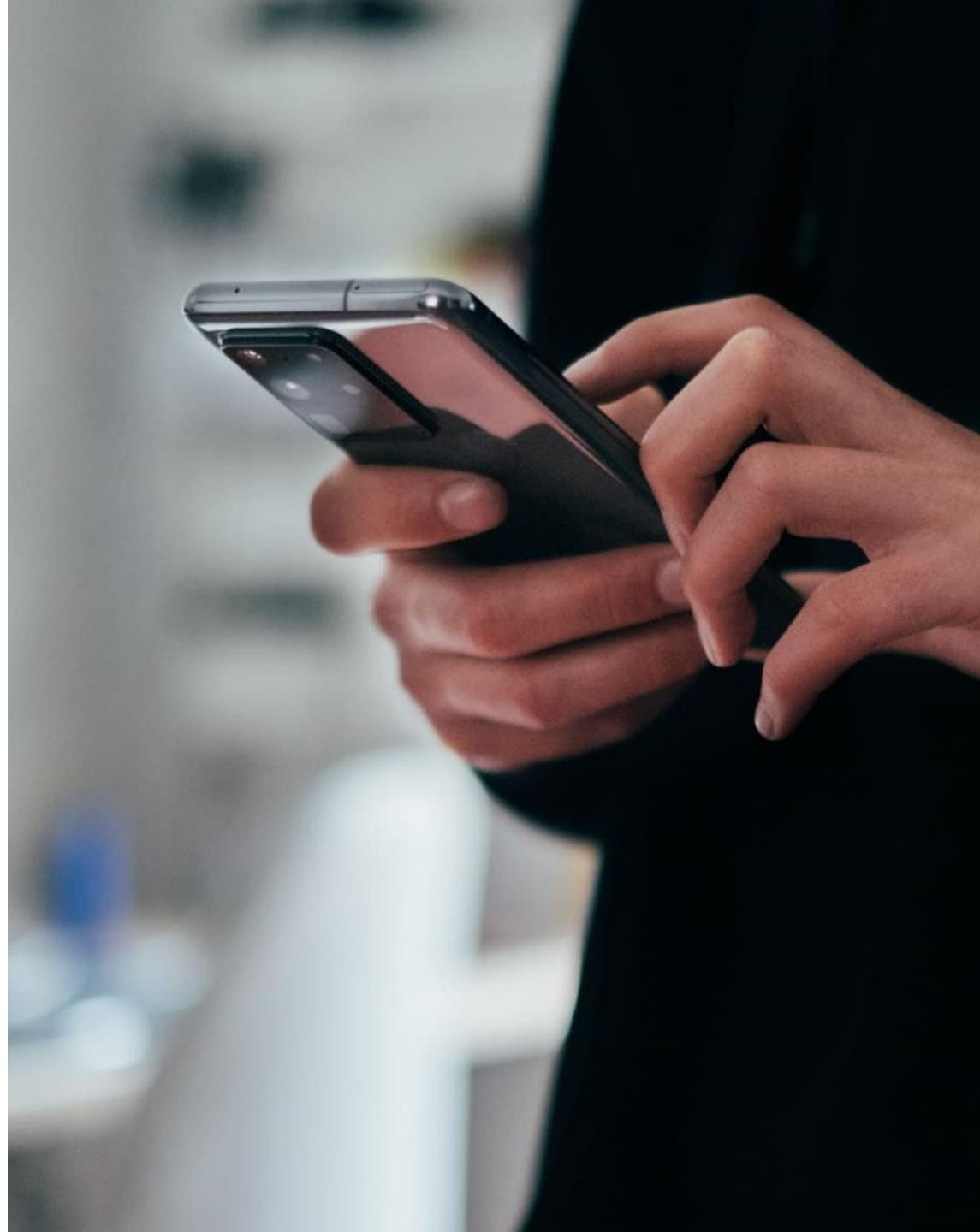


A17A What transportation mode(s) do you use most of the time to go from home to your business trip ? A17B. Do you sometimes use several transportation modes for the same trip, whether for your home-work trips or for your business trips?

X% / X% significantly higher / lower vs. all countries
▲ / ▼ significant positive / negative evolution vs 2022

3.

MAAS APPLICATIONS SHOW SOME ROOM FOR GROWTH



Employees use applications for planning, booking, or paying for transportation for less than 1 out of 2 business trips and 1 out of 4 commuting ones. Uber and local train companies are the most widely used applications.

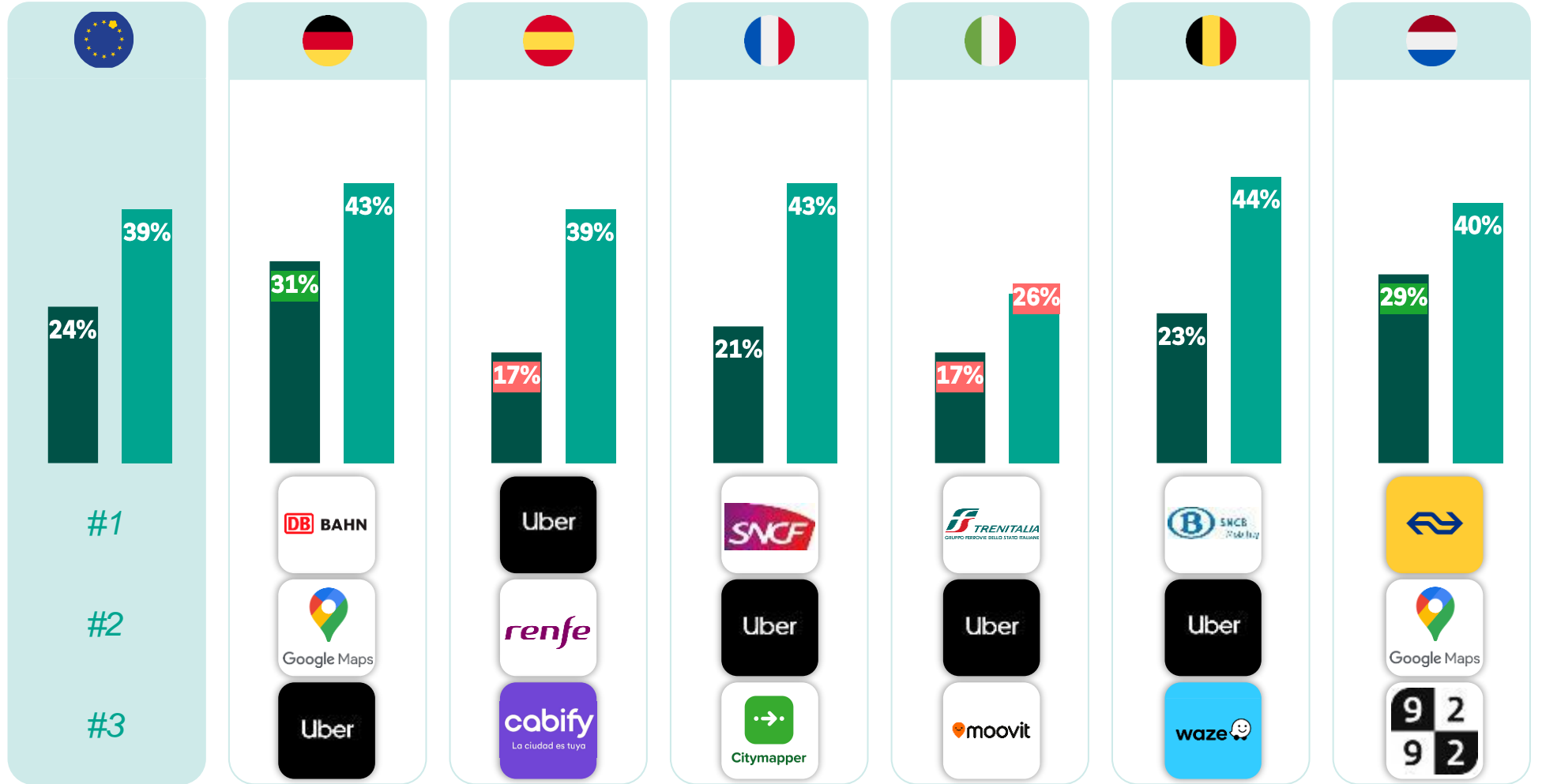
APPLICATIONS USE AMONG TRAVELLERS

■ For home/work commuting

Basis : does home/work commuting (N=2847)

■ For business trips

Basis : does business trips (N=1579)

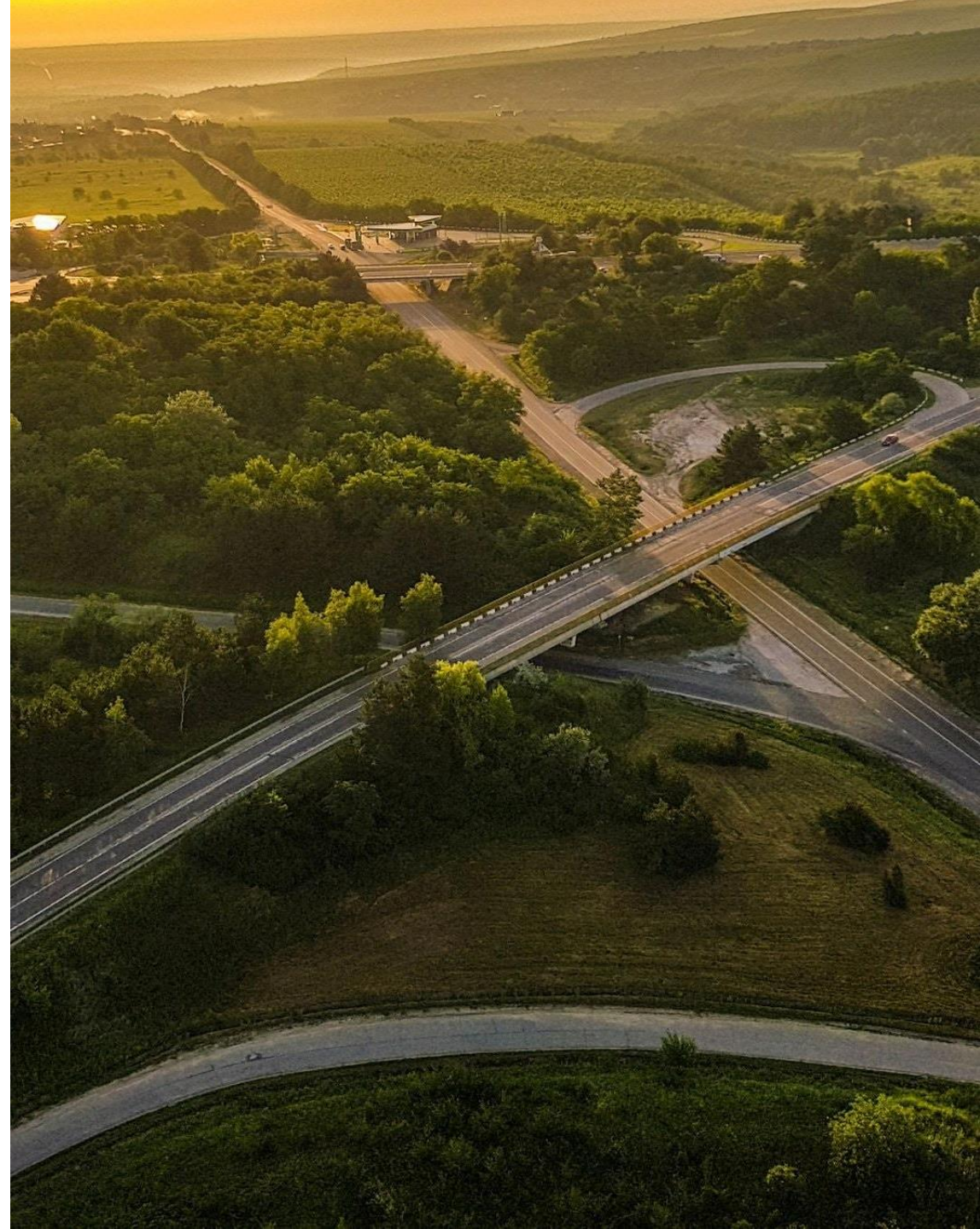


TOP-3 MOST QUOTED APPLICATIONS PER COUNTRY

Basis : Uses an application for business or home-work or business trips (N=1112)

4.

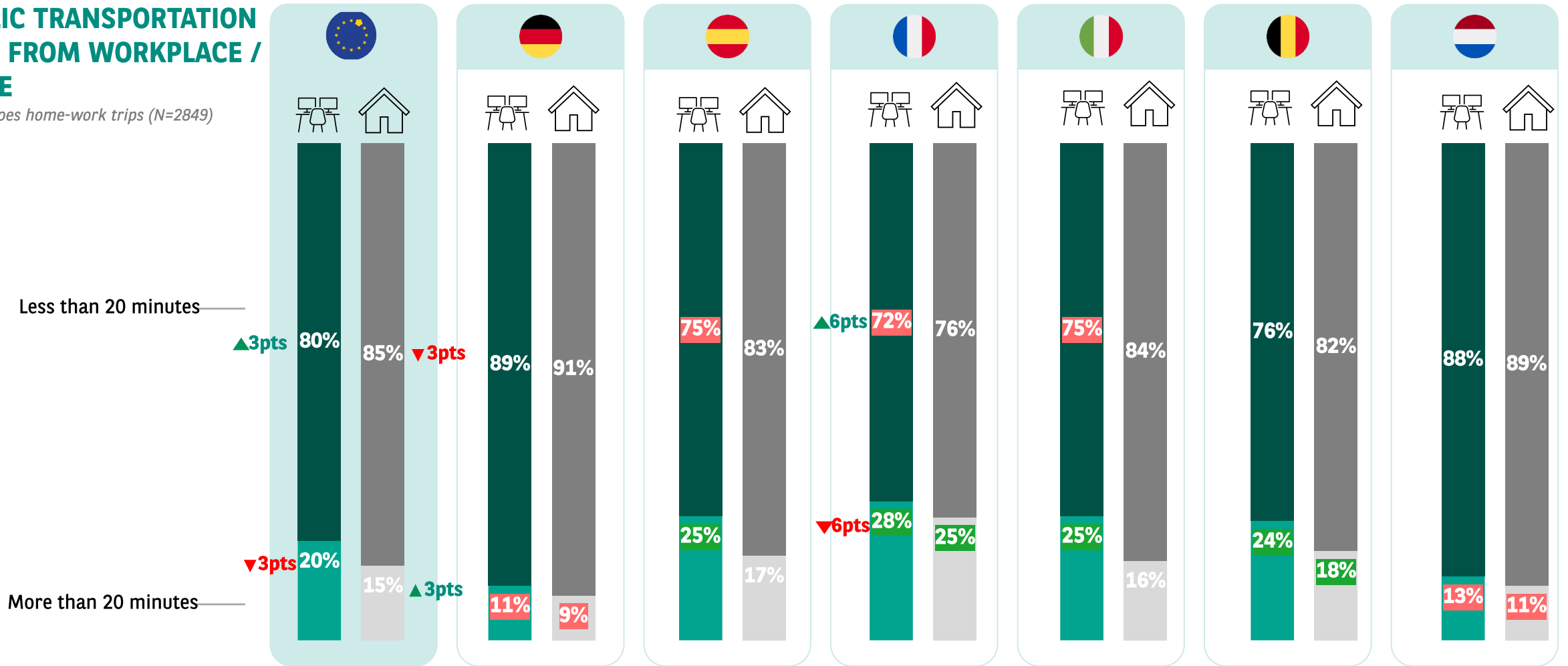
THE IDEAL TRANSPORTATION MODE SHOULD BE FLEXIBLE, FAST, SAFE AND CLOSE TO HOME/WORK



French employees tend to live and work further from public transportation compared to other countries.

ACCESSIBILITY TO A PUBLIC TRANSPORTATION STOP FROM WORKPLACE / HOME

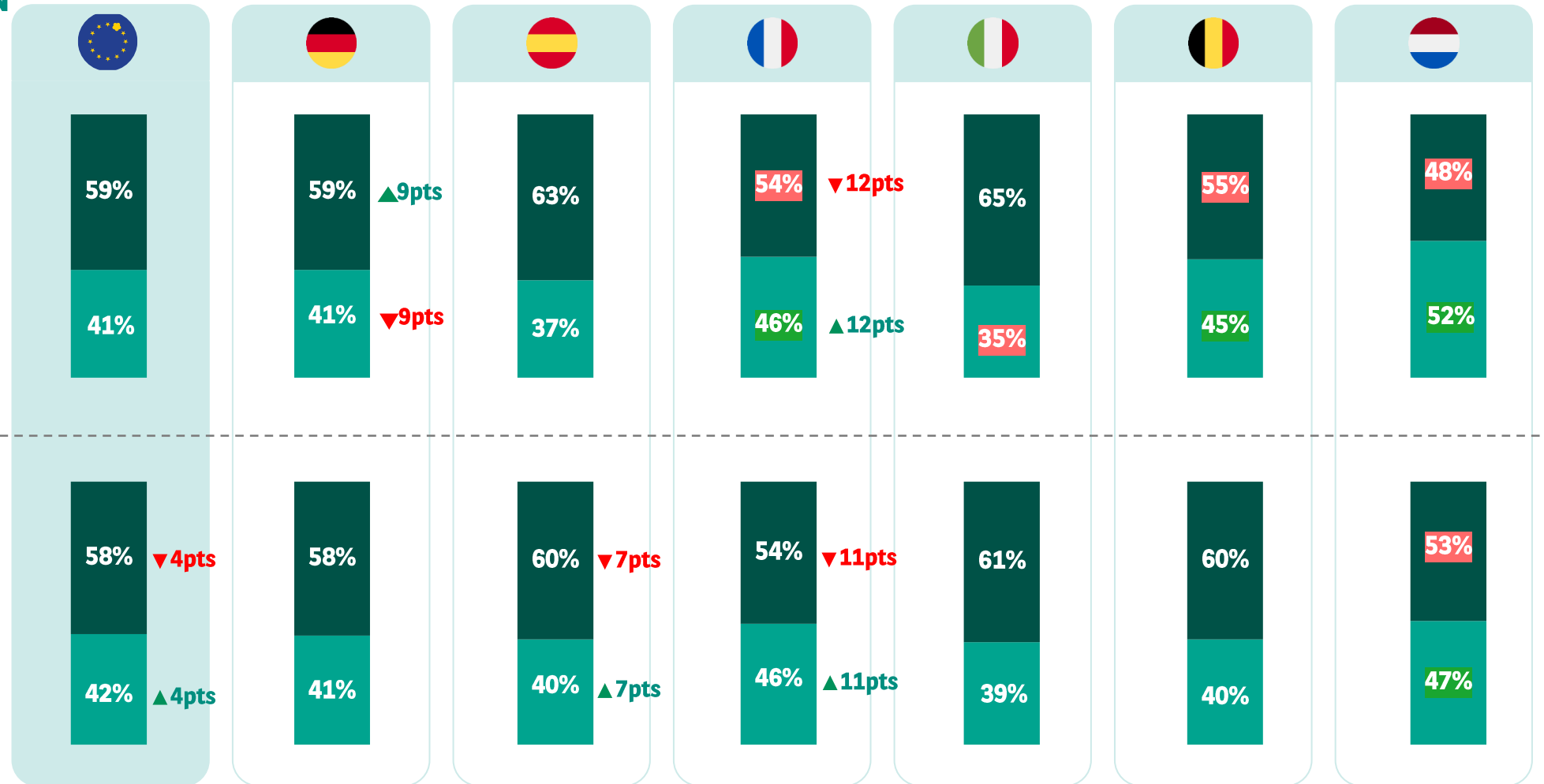
Basis : Does home-work trips (N=2849)



In general, the commuting time have increased since 2022, despite similar distances for home-work trips.
 In France since 2022, both commuting distance and time have increased

DISTANCE HOME- WORKPLACE : ESTIMATION AND COMMUTING TIME

Basis : does home/work trips
 (N=2847)

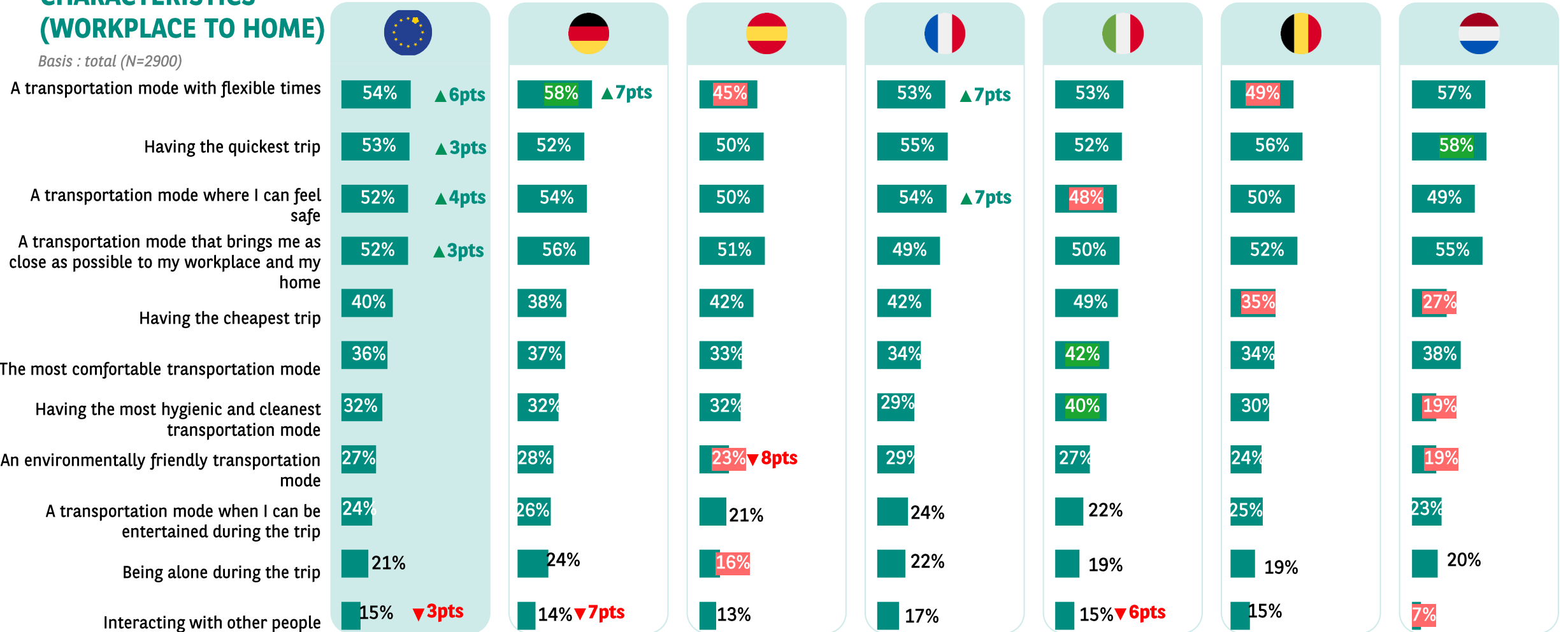


For commuting : flexibility, speed, safety, and proximity, already important two years ago, have become even more so.

IDEAL TRANSPORTATION CHARACTERISTICS (WORKPLACE TO HOME)

Basis : total (N=2900)

% Very important

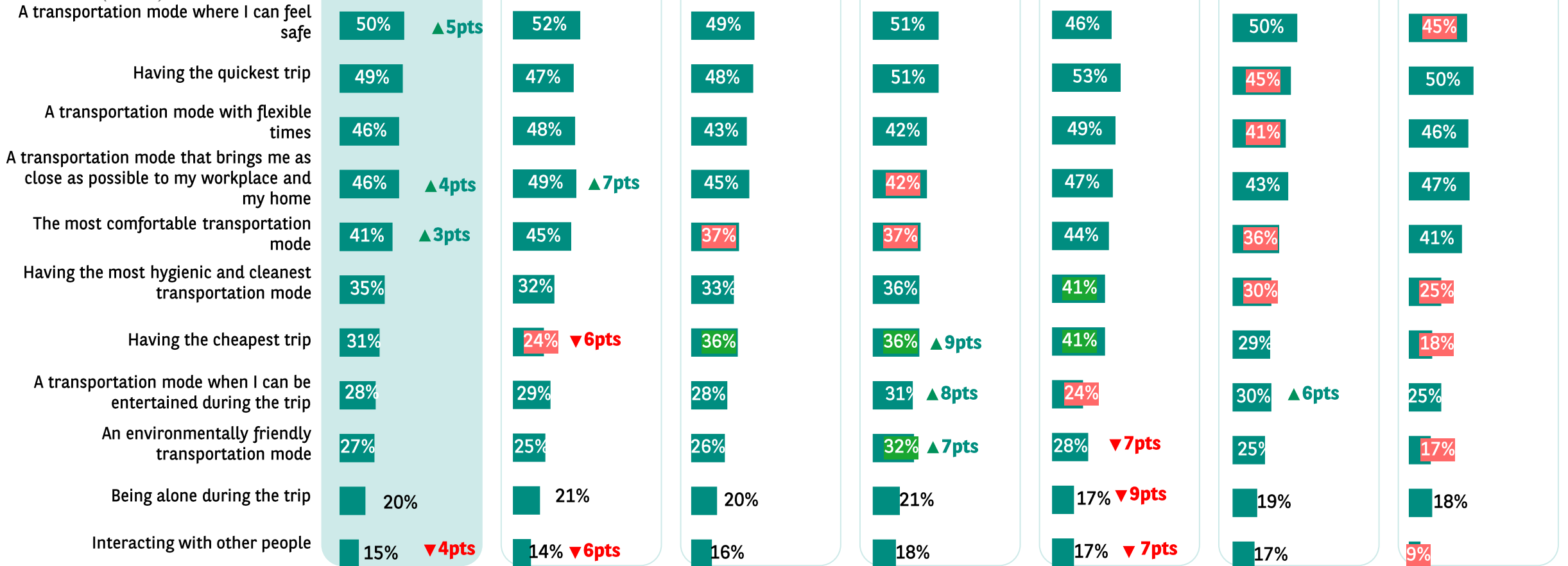


For business trips : safety has become as important as speed when choosing a transportation mode, followed by flexibility and comfort.

IDEAL TRANSPORTATION CHARACTERISTICS (BUSINESS TRIPS)

% Very important

Basis : total (N=2900)



B5C. How important would be the following criteria be if you had to choose a transportation mode for your business trips ?

X% / X% significantly higher / lower vs. all countries
 ▲ / ▼ significant positive / negative evolution vs 2022

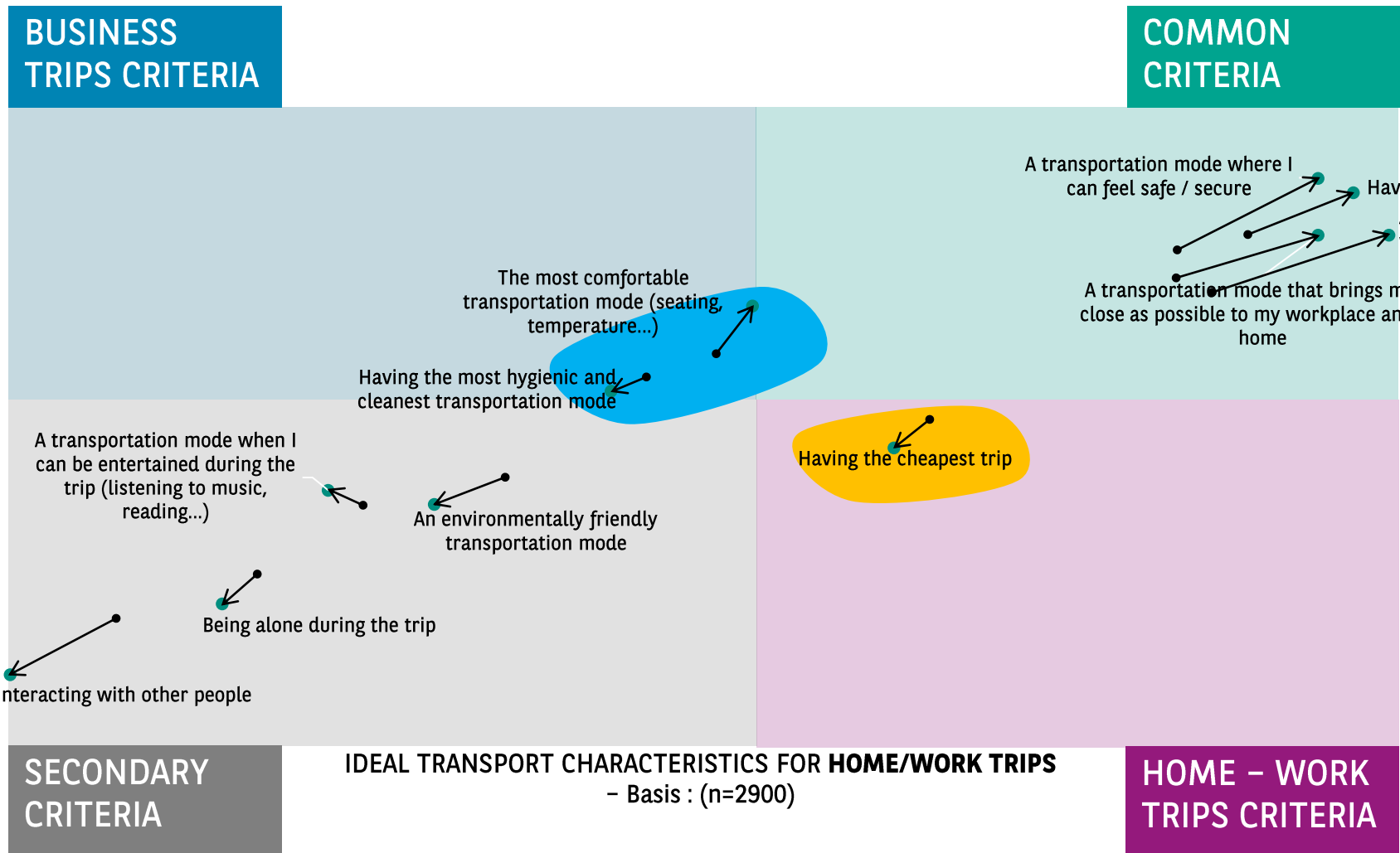
Speed, proximity, flexibility, and safety remain strong drivers for both business and commuting. Comfort and cleanliness are still preferred for business travel, while price is a higher priority for commuting.

IDEAL TRANSPORTATION CHARACTERISTICS

Basis : total (N=2900)

IDEAL TRANSPORT CHARACTERISTICS FOR BUSINESSES TRIPS - Basis (n=2900)

Based on the criteria very important



B5A. How important would be the following criteria be if you had to choose a transportation mode from your workplace to your home? B5C. How important would be the following criteria be if you had to choose a transportation mode for your business trips ?

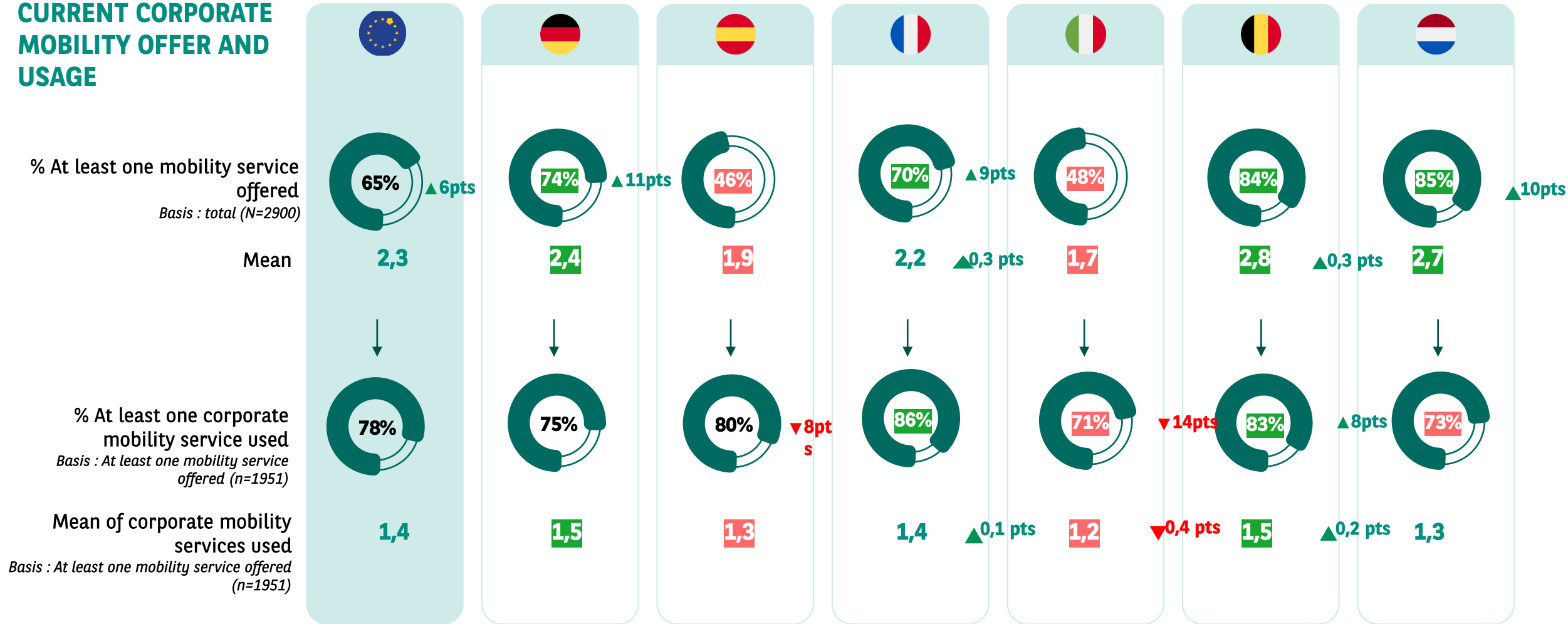
5.

**DESPITE PERSISTENT DISPARITIES
ACROSS COUNTRIES, CORPORATE
MOBILITY OFFER HAS IMPROVED,
LEADING TO GREATER EMPLOYEE
SATISFACTION**



Corporate mobility services offer has improved, with 65% of companies offering at least one (+6pts). Germany, France and the Netherlands have caught up with Belgium, while Spain and Italy still lag behind. While overall adoption remains high at almost 80%, it is decreasing in Spain and Italy.

CURRENT CORPORATE MOBILITY OFFER AND USAGE

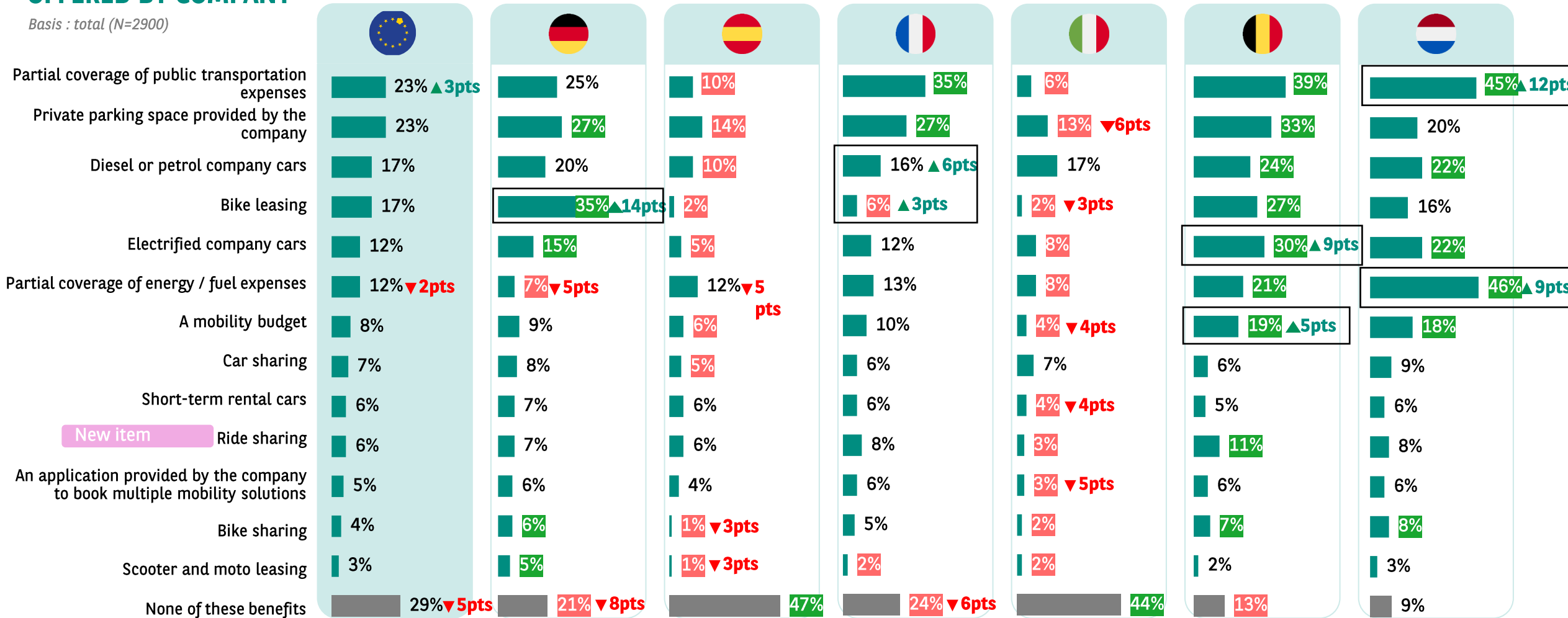


B1A. As far as you know, what does your company currently offer in order to facilitate your mobility? B1B. And which of the mobility services offered by your company are you personally using?

Country focus: Germany and France offer more bike-leasing options, while the Netherlands has expanded its partial coverage of public transportation and fuel expenses. Belgium continues to lead, having also increased its offer of electrified company cars and mobility budgets.

DETAIL OF MOBILITY SERVICES OFFERED BY COMPANY

Basis : total (N=2900)



B1A. As far as you know, what does your company currently offering in order to facilitate your mobility?

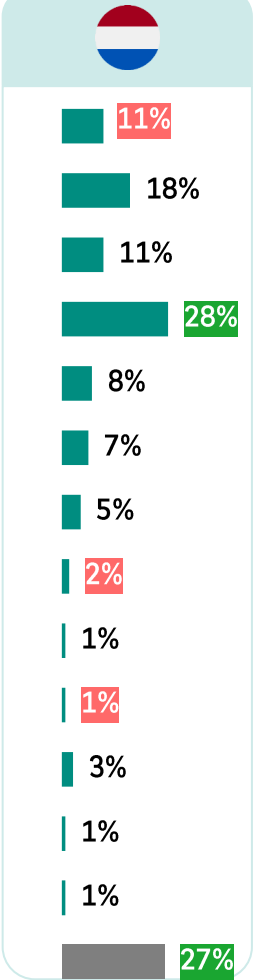
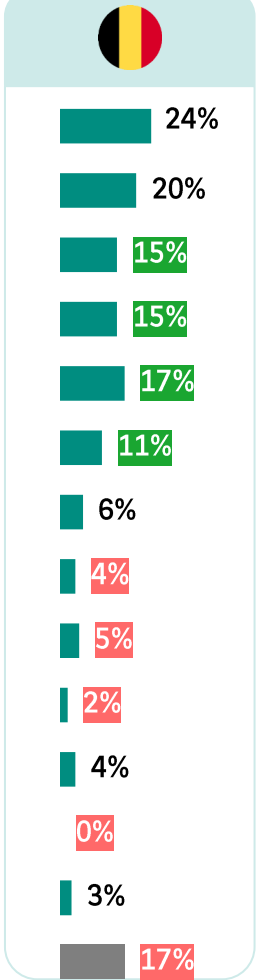
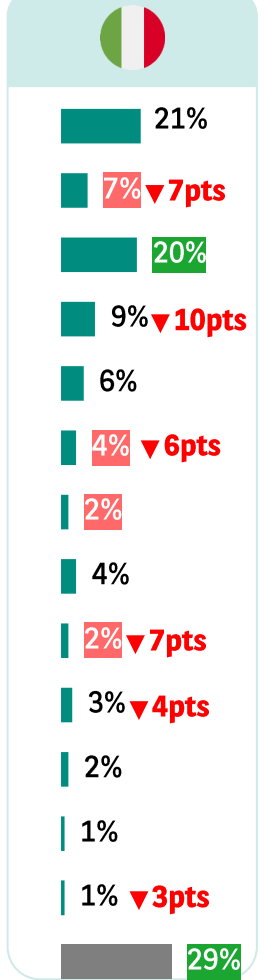
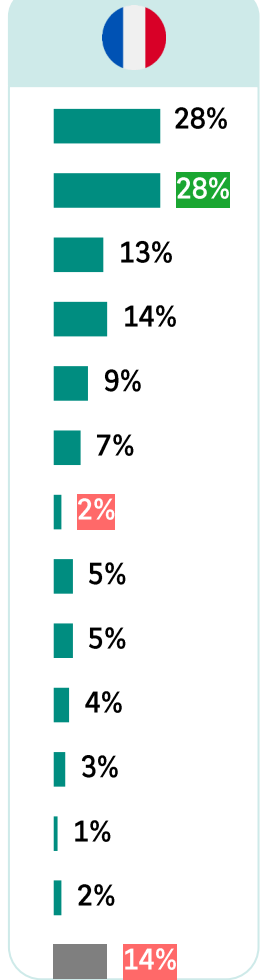
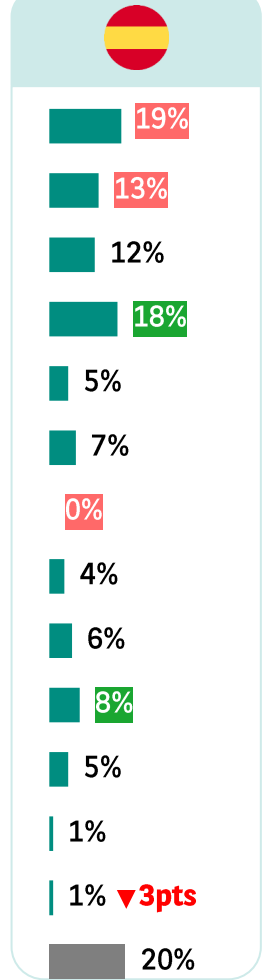
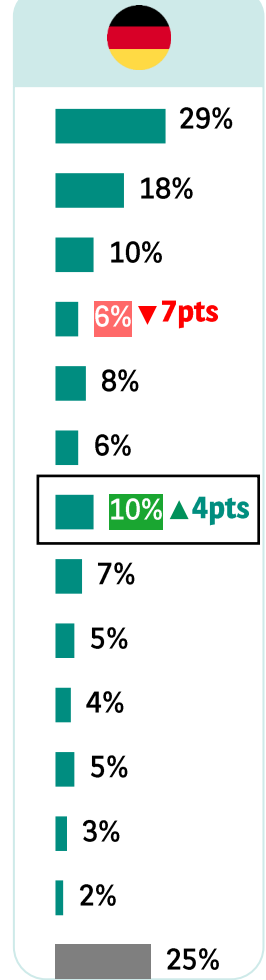
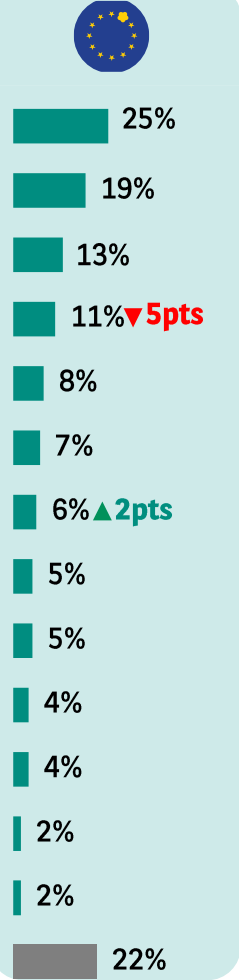
X% / X% significantly higher / lower vs. all countries
▲ / ▼ significant positive / negative evolution vs 2022

Overall, employees remain car-oriented, with a focus on private parking spaces and company cars. The adoption of alternative transportation solutions remains relatively stagnant, although bike leasing has seen a slight increase in Germany.

DETAIL OF MOBILITY SERVICES USED BY EMPLOYEES

Basis : at least one mobility offering in the company (N=1951)

Private parking space provided by the company



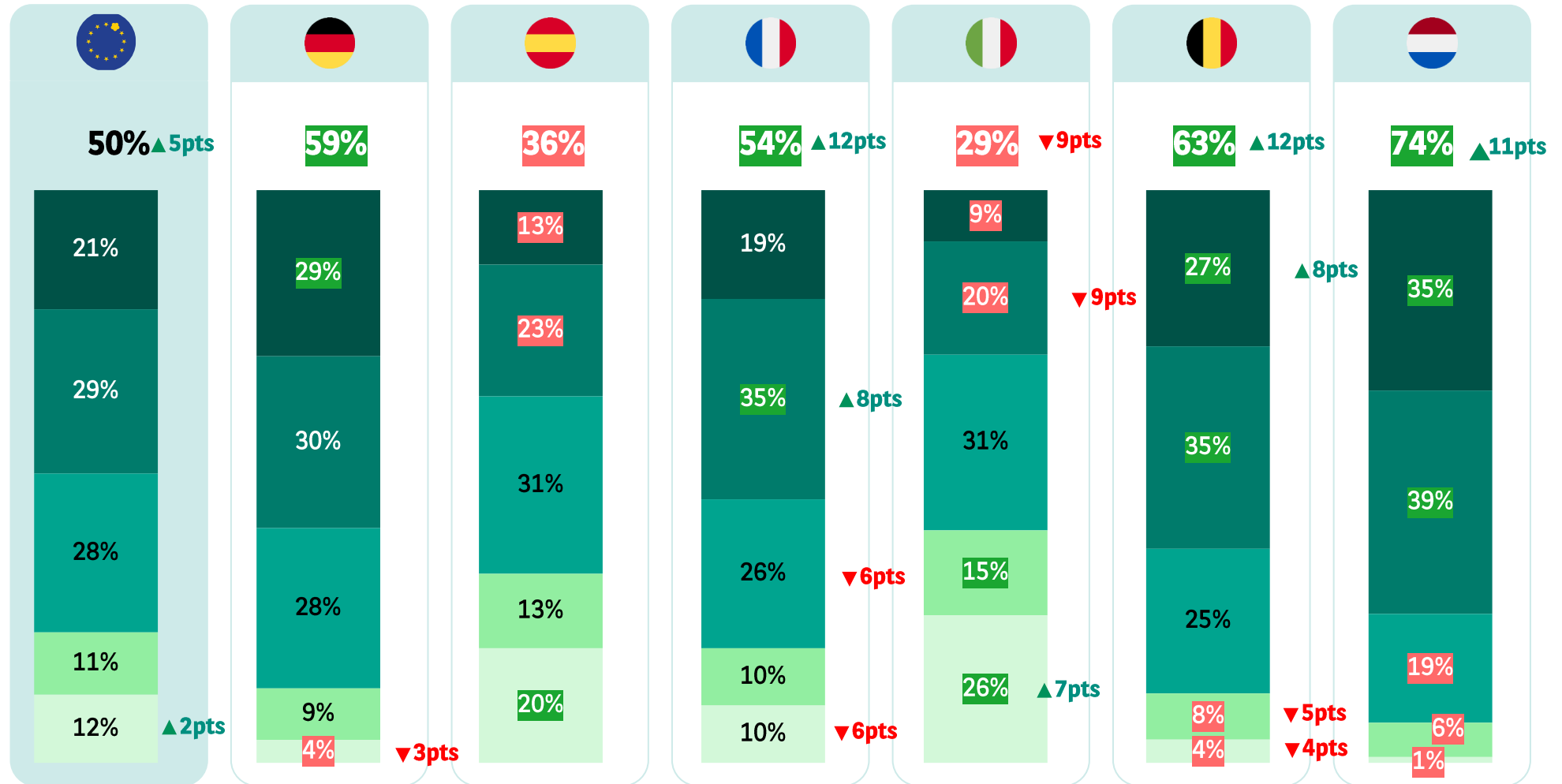
The link between the company's mobility offer and the employees' satisfaction: Employees' satisfaction with corporate mobility offer has increased in France, Belgium, and the Netherlands, where improvements to those offers have been most significant, compared to 2022.

CURRENT MOBILITY OFFER SATISFACTION

Basis : total (N=2900)

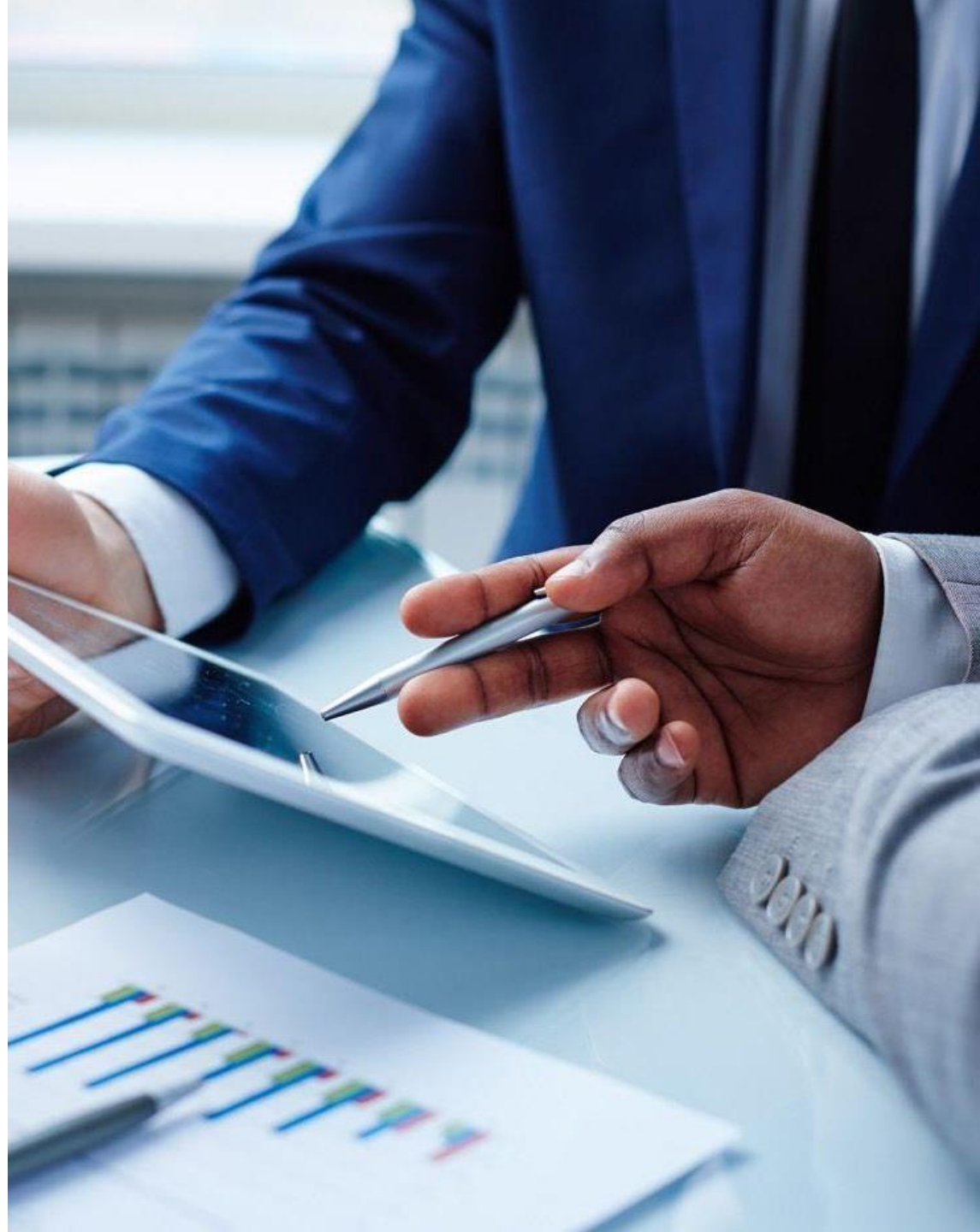
TOTAL Satisfied
(Definitely satisfied + somewhat satisfied)

- Definitely satisfied
- Somewhat satisfied
- Not satisfied or unsatisfied
- Somewhat unsatisfied
- Definitely unsatisfied



6.

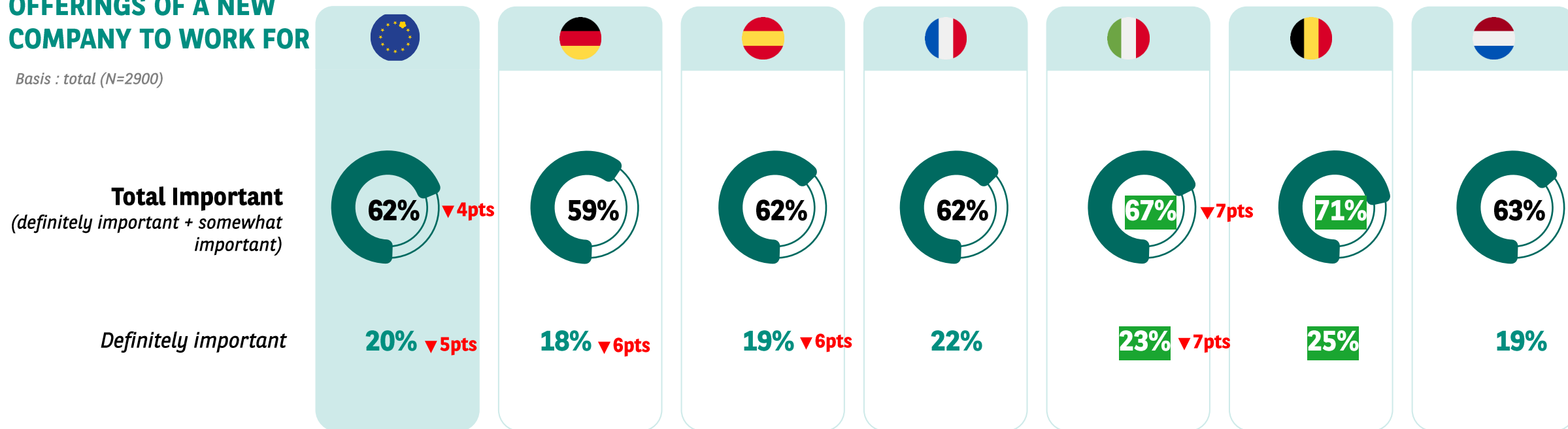
**CORPORATE MOBILITY SOLUTIONS
REMAIN STRONG INCENTIVES FOR
NEW HIRES.**



Mobility solutions remain a lever of attraction for potential future employees, though there is a slight decrease compared to two years ago, especially in Italy. They remain key for 3 out of 10 employees actively planning to change their jobs in the next 6 months

IMPORTANCE OF MOBILITY OFFERINGS OF A NEW COMPANY TO WORK FOR

Basis : total (N=2900)



This criteria is important for **72%** of people who plan to leave their jobs in the next 6 months; and definitely important for **32%**.

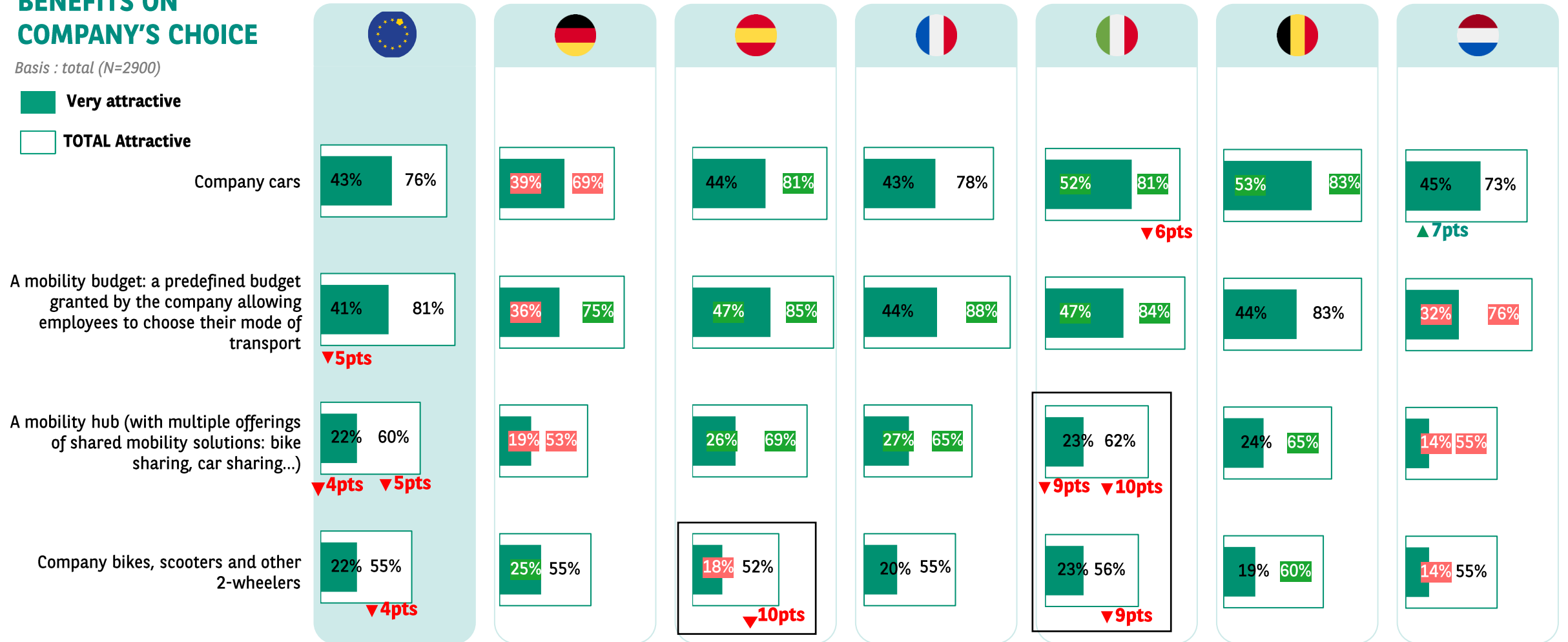
Company cars and mobility budgets remain strong incentives for new hires, while mobility hubs and company-provided 2-wheelers are seeing a slight decline, especially in Spain and Italy.

IMPACT OF MOBILITY BENEFITS ON COMPANY'S CHOICE

Basis : total (N=2900)

■ Very attractive

TOTAL Attractive



7.

EXPECTATIONS FOR MOBILITY SOLUTIONS ARE HIGH, BUT EMPLOYEES ARE OPTIMISTIC

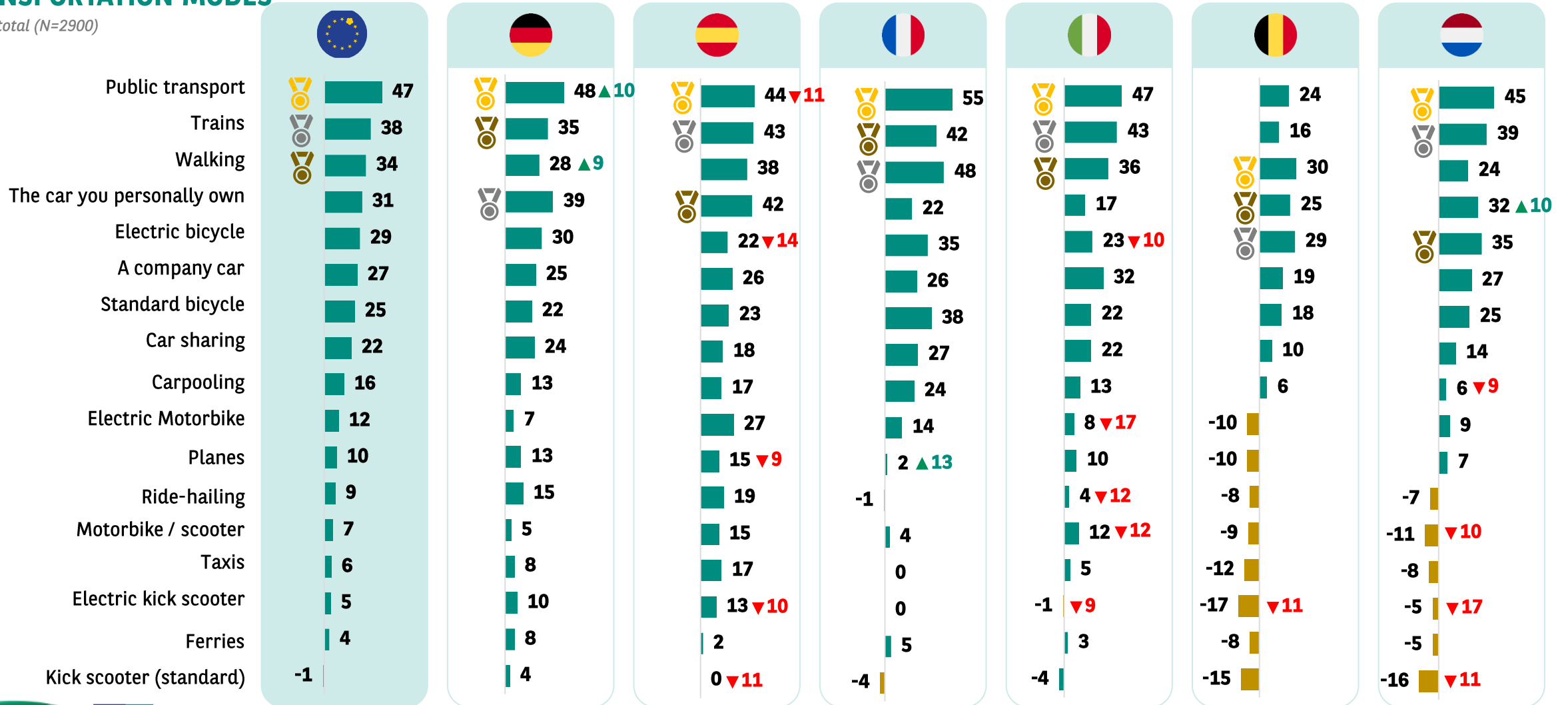


For the next few years, employees expect a continued development of mobility solutions, particularly public transport. However, in some countries, notably Spain and Italy, there is less expectation for an increase in the use of 2-wheelers.

EXPECTED DEVELOPMENT OF TRANSPORTATION MODES

Basis : total (N=2900)

Delta More developed -
Less developed



B6. In the next few years, what transportation mode would you like to see developed and, on the contrary, which one would you see being less used for your home-work trips or business trips?

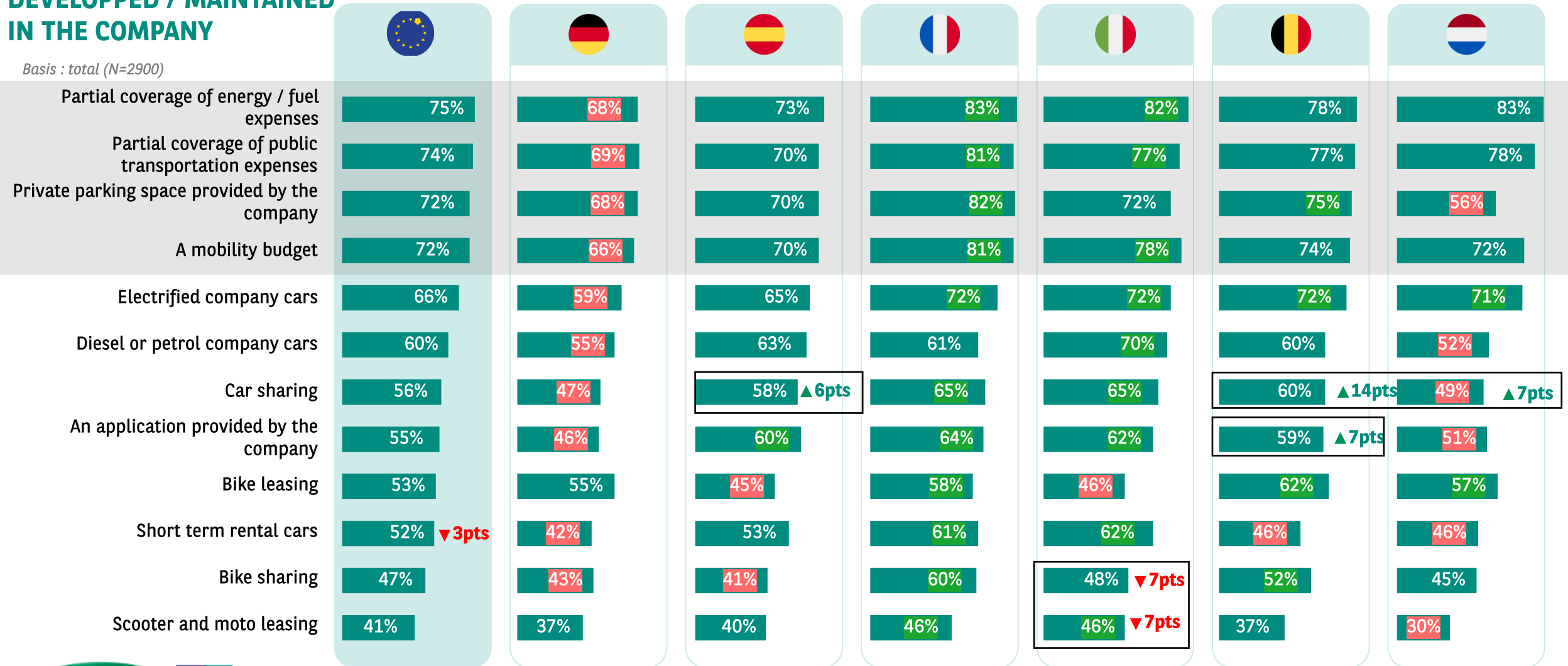
▲ / ▼ significant positive / negative evolution vs 2022 36

Employees continue to have high expectations regarding corporate mobility offering. There is a desire for increased car-sharing options in Spain, Belgium, and the Netherlands, and for a dedicated mobility app in Belgium. In Italy, there is less expectation for shared or leased 2-wheeler options.

MOBILITY OFFERINGS TO BE DEVELOPPED / MAINTAINED IN THE COMPANY

Basis : total (N=2900)

Total "would like" (certainly would like + probably would like)



B7. For each of the mobility offering below, to what extent would you like your company to offering them or keep offering them for your home-work trips and for your business trips?

X% / X% significantly higher / lower vs. all countries

▲ / ▼ significant positive / negative evolution vs 2022

Except for Spain and Italy (as in 2022), employees are rather optimistic: nearly two-thirds anticipate that companies will enhance their mobility offerings within the next five years. French and Dutch employees are showing stronger confidence than in 2022.

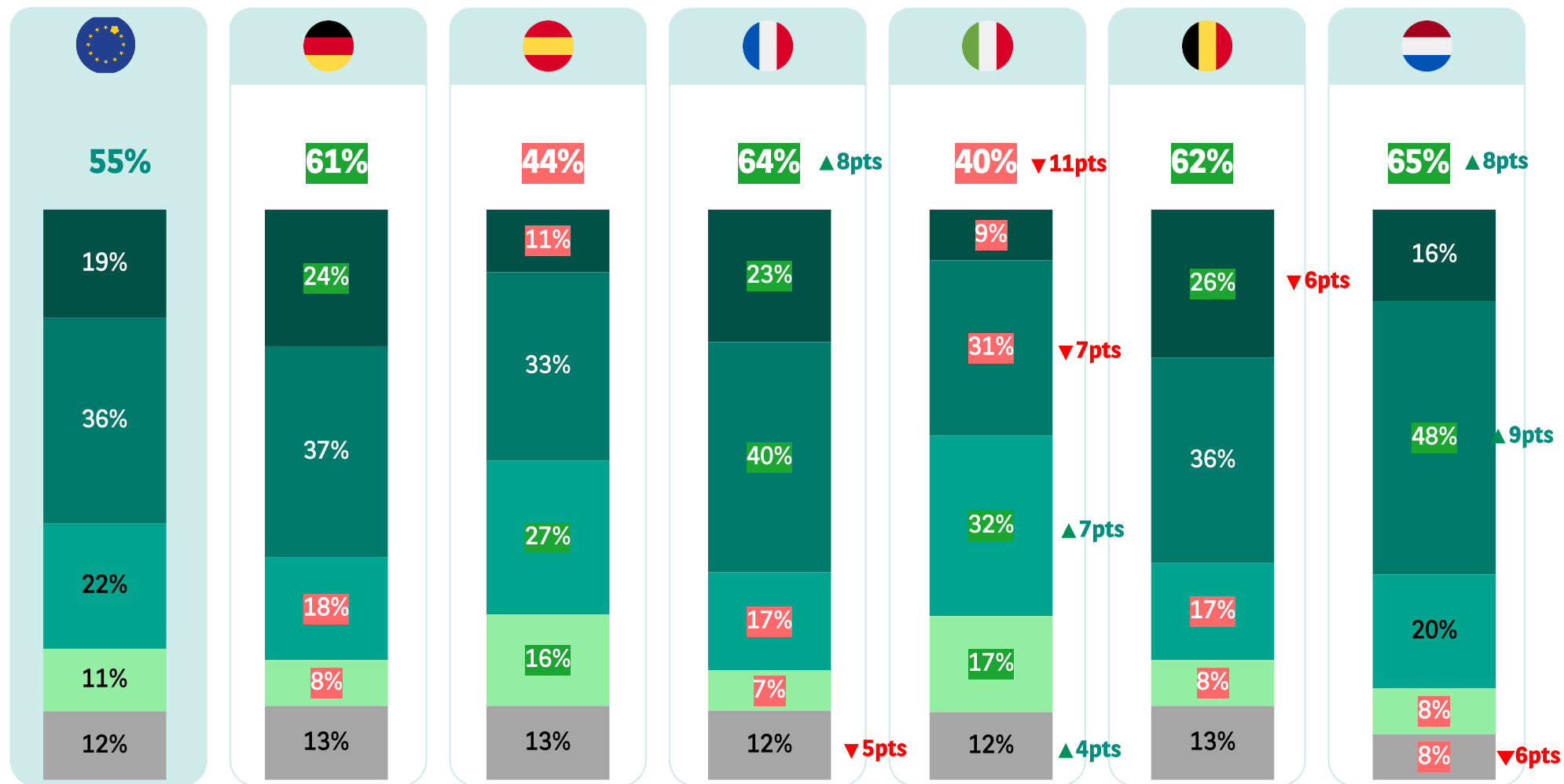
LIKELIHOOD FOR COMPANIES TO INCREASE THEIR MOBILITY OFFERING

Basis : total (N=2900)

TOTAL Likely to increase
(definitely likely + somewhat likely)

(definitely likely + somewhat likely)

- Definitely likely
- Somewhat likely
- Somewhat unlikely
- Definitely unlikely
- Don't know



B11. To conclude, how likely do you think it is that private companies in general will increase their range of mobility offering in the next 5 years?

X% / X% significantly higher / lower vs. all countries
▲ / ▼ significant positive / negative evolution vs 2022

Beyond its environmental impact, corporate mobility remains a strong lever for enhancing corporate image, with no significant evolution compared to 2022.

POTENTIAL BENEFITS FROM MOBILITY OFFERINGS - TOP 3

Basis : total (N=2900)

| | Diesel or petrol company cars | Electrified company cars | Car sharing | Short-term rental cars | Ride sharing | Scooter and moto leasing | Bike leasing |
|----|---|--|--|--|--|--|---|
| #1 | <i>It would facilitate your home-workplace trips (18%)</i> | <i>It would reduce your carbon footprint (25%)</i> | <i>You would see your company in better light (16%)</i> | <i>You would see your company in better light (13%)</i> | <i>It would reduce your carbon footprint (18%)</i> | <i>You would see your company in better light (9%)</i> | <i>It would reduce your carbon footprint (16%)</i> |
| #2 | <i>You would see your company in better light (15%)</i> | <i>You would see your company in better light (20%)</i> | <i>It would reduce your carbon footprint (14%)</i> | <i>It would facilitate your home-workplace trips (12%)</i> | <i>You would see your company in better light (11%)</i> | <i>It would facilitate your home-workplace trips (9%)</i> | <i>More opportunities to be physically active and contribute to better health (16%)</i> |
| #3 | <i>You would be less likely to leave the company (14%)</i> | <i>It would facilitate your home-workplace trips (14%)</i> | <i>It would facilitate your home-workplace trips (12%)</i> | <i>It would improve your quality of life at work (10%)</i> | <i>It would facilitate your home-workplace trips (11%)</i> | <i>It would reduce your carbon footprint (8%)</i> | <i>You would see your company in better light (13%)</i> |
| | Bike sharing | Partial coverage of transportation expenses | Partial coverage of energy / fuel expenses | Private parking space provided by the company | A mobility budget | An application provided by the company | |
| #1 | <i>It would reduce your carbon footprint (15%)</i> | <i>You would see your company in better light (27%)</i> | <i>You would see your company in better light (28%)</i> | <i>You would see your company in better light (18%)</i> | <i>You would see your company in better light (25%)</i> | <i>You would see your company in better light (13%)</i> | |
| #2 | <i>More opportunities to be physically active and contribute to better health (13%)</i> | <i>It would reduce your carbon footprint (18%)</i> | <i>You would be less likely to leave the company (19%)</i> | <i>It would facilitate your home-workplace trips (18%)</i> | <i>It would improve your quality of life at work (18%)</i> | <i>It would improve your quality of life at work (12%)</i> | |
| #3 | <i>You would see your company in better light (10%)</i> | <i>It would facilitate your home-workplace trips (16%)</i> | <i>It would improve your quality of life at work (17%)</i> | <i>It would improve your quality of life at work (17%)</i> | <i>It would facilitate your home-workplace trips (16%)</i> | <i>It would facilitate your home-workplace trips (12%)</i> | |

B8. What advantages would you or do you personally get from the mobility offering below if they were developed by your company for your home-work trips and your business trips?

CONTACT



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