

The KANTAR logo is positioned in the top left corner. It features the word "KANTAR" in a bold, black, sans-serif font. A vertical yellow bar is located to the left of the letter "K".

**KANTAR**

The Arval Mobility Observatory logo is located in the upper left area. It consists of the words "Arval Mobility" and "Observatory" stacked vertically in a white, sans-serif font. The text is enclosed within a green, stylized oval shape that has a slight gradient and a shadow effect.

Arval Mobility  
Observatory

The main title "2020 FLEET BAROMETER" is displayed in large, white, bold, sans-serif capital letters. It is centered within a dark grey rectangular box that has a slight shadow and is positioned on the left side of the image.

**2020  
FLEET  
BAROMETER**

The text "GLOBAL" and "June 2020" is located in the bottom left corner. "GLOBAL" is in a white, bold, sans-serif font, and "June 2020" is in a smaller, white, sans-serif font below it. Both are contained within a dark grey rectangular box.

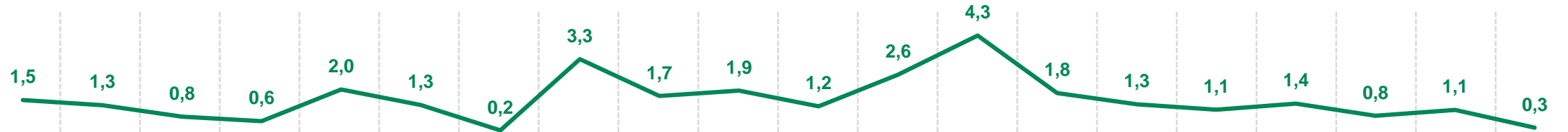
**GLOBAL**  
June 2020



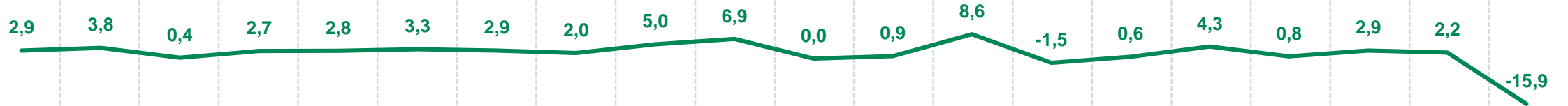
# 1 CONTEXT AND METHODOLOGY

# GLOBAL ECONOMIC CONTEXT PER COUNTRY

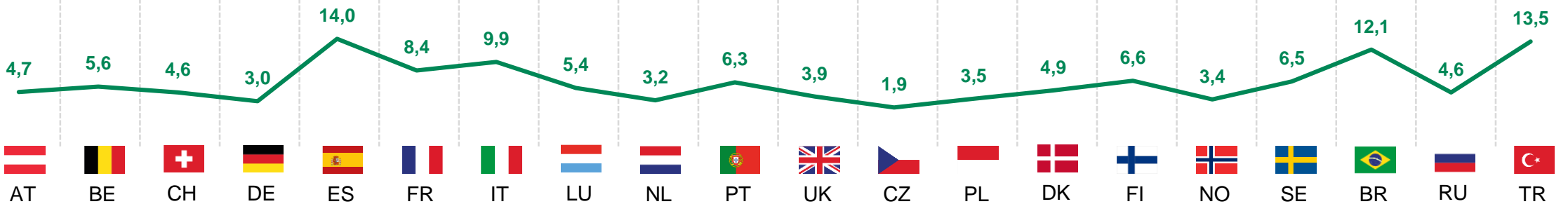
GDP growth in volume in 2019 (Source OECD)



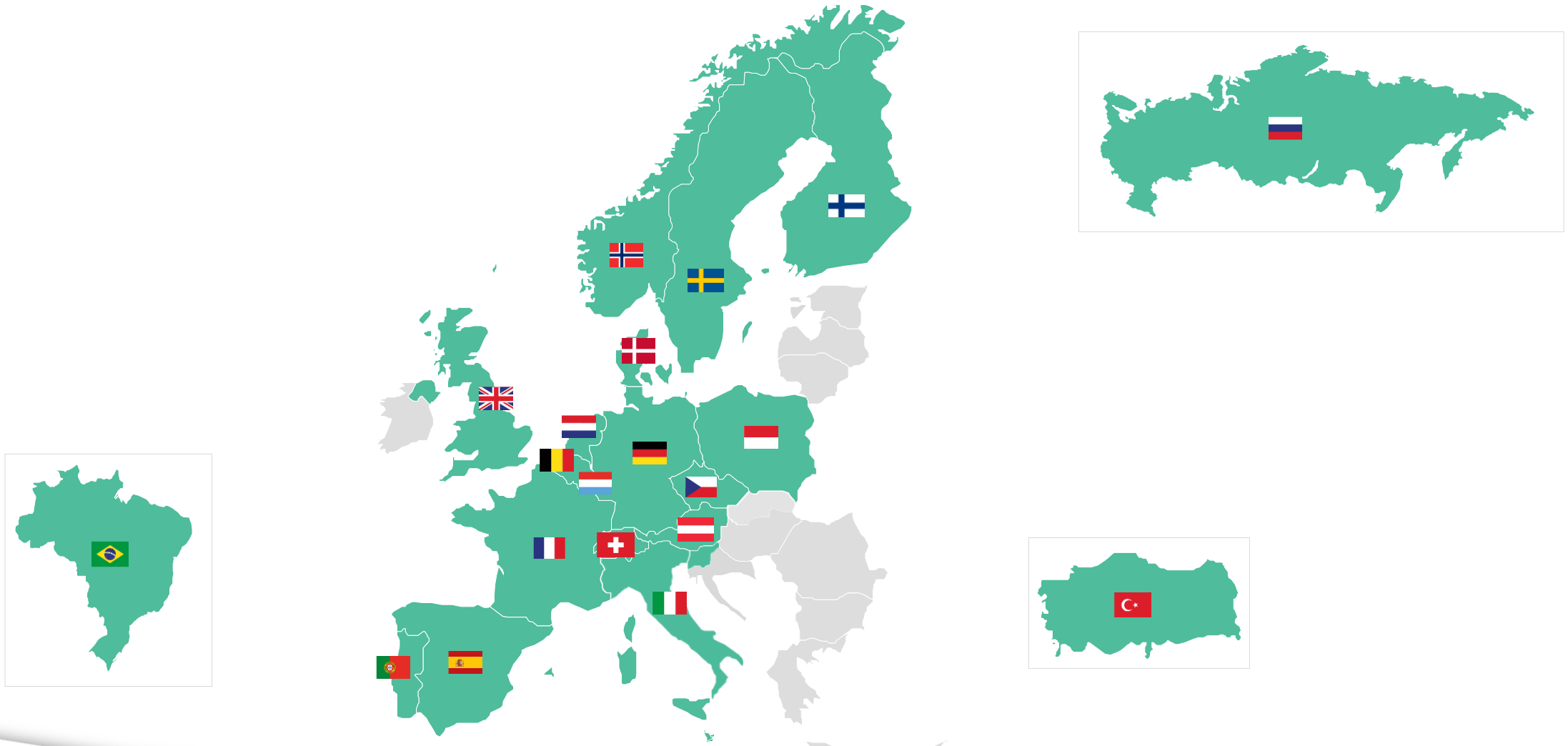
Investment growth in volume in 2019 (Source OECD)



Unemployment rate (source ILO)



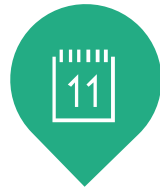
# PERIMETER OF THE STUDY



# METHODOLOGY



DATA COLLECTION METHOD



FIELDWORK PERIOD



TARGET



QUOTAS



SAMPLE

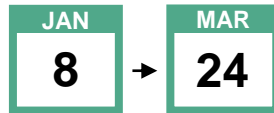


DURATION OF INTERVIEW

MIX OF 2 DATA COLLECTION MODES

1. CATI SYSTEM  
(Computer Assisted Telephone Interviewing)

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



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

COMPANY SIZE & SECTOR

4 794 through Europe  
806 out of Europe

5 600 Interviews in total

20 minutes on average

# NUMBER OF INTERVIEWS CONDUCTED

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



Companies with less than 10 employees  
**1630 INTERVIEWS**



Companies with 10 to 99 employees  
**1261 INTERVIEWS**



Companies with 100 to 249 / 499 / 999 employees  
**1454 INTERVIEWS**

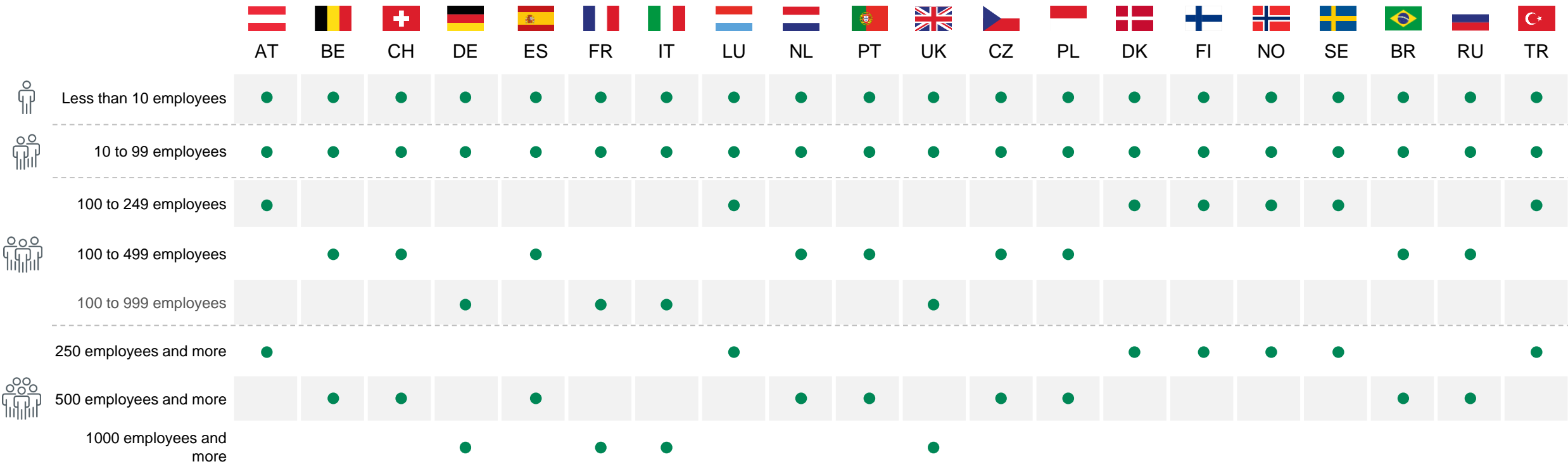


Companies with 250 / 500 / 1000 employees and more  
**1255 INTERVIEWS**

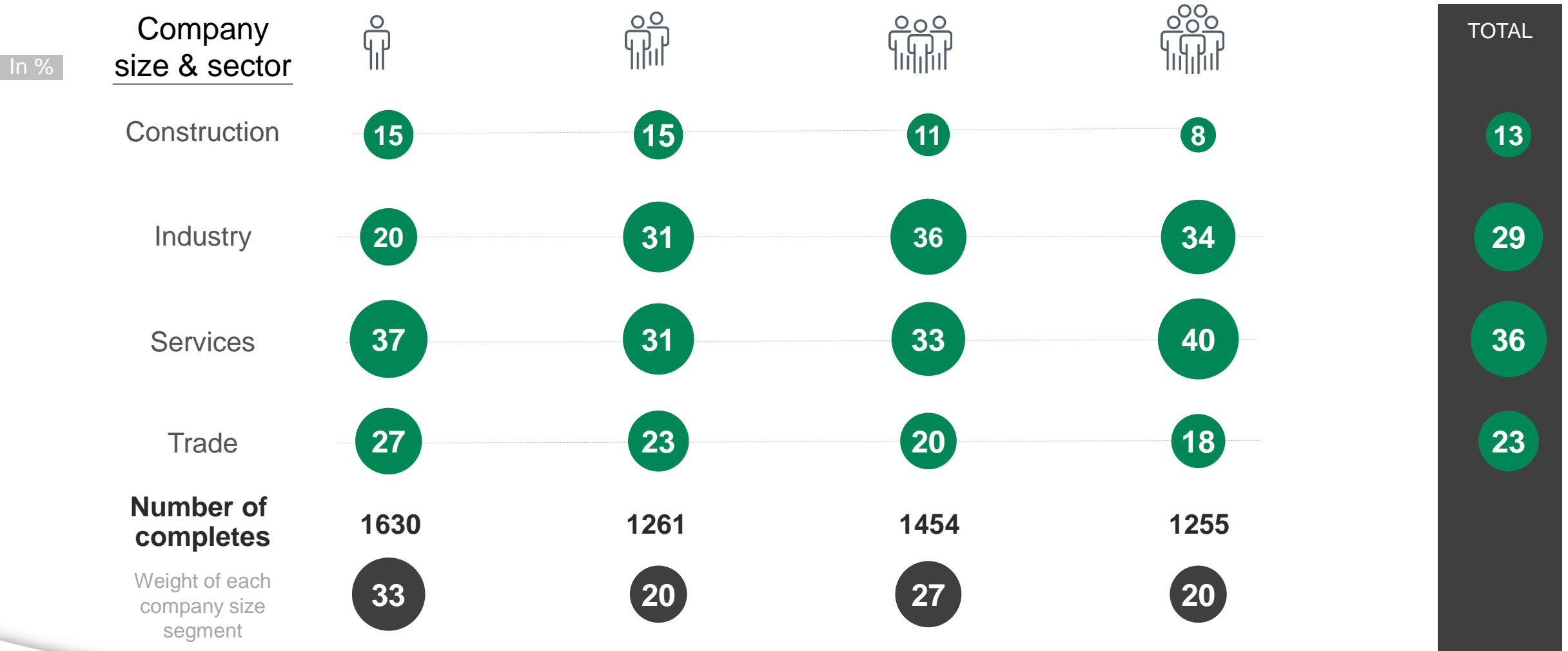
**1 to 99  
employees  
2891 INTERVIEWS**

**100 employees  
and more  
2709 INTERVIEWS**

# COMPANY SIZE SEGMENT DEFINITION



# SAMPLE STRUCTURE



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 bases**. In the following slides, no additional weighting of the data are applied to company sizes or activity sectors segments.





2

# WHAT ARE THE MAIN CHARACTERISTICS OF THE FLEETS?

# NUMBER OF VEHICLES IN FLEET

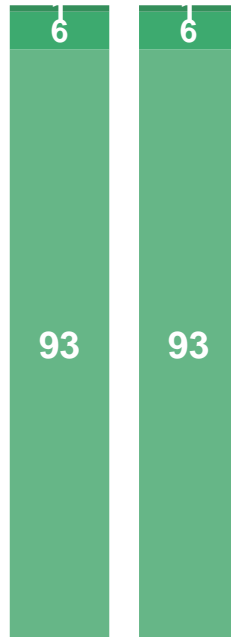
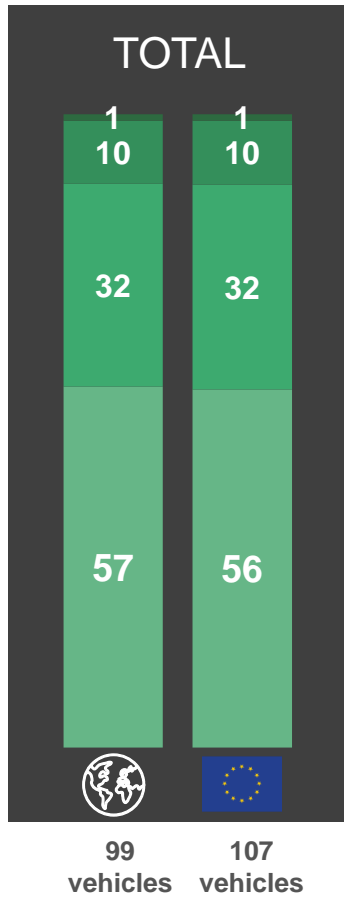
In %



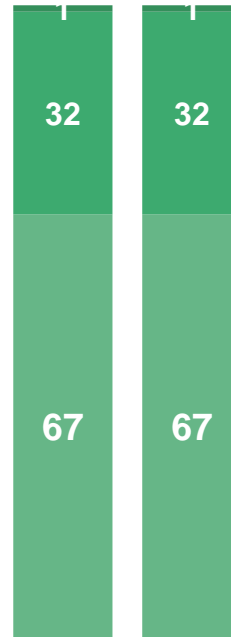
Passenger cars + LCVs

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

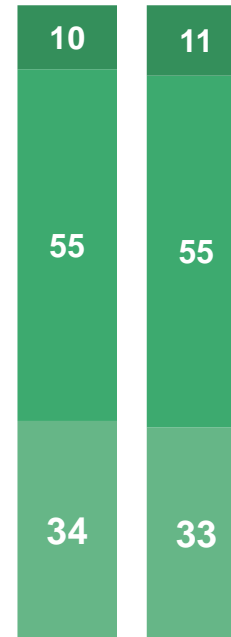
Average number of vehicles



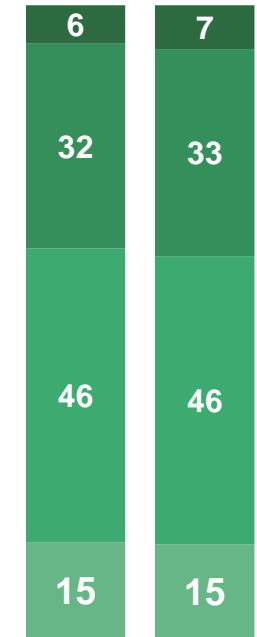
6 6



35 40



46 48



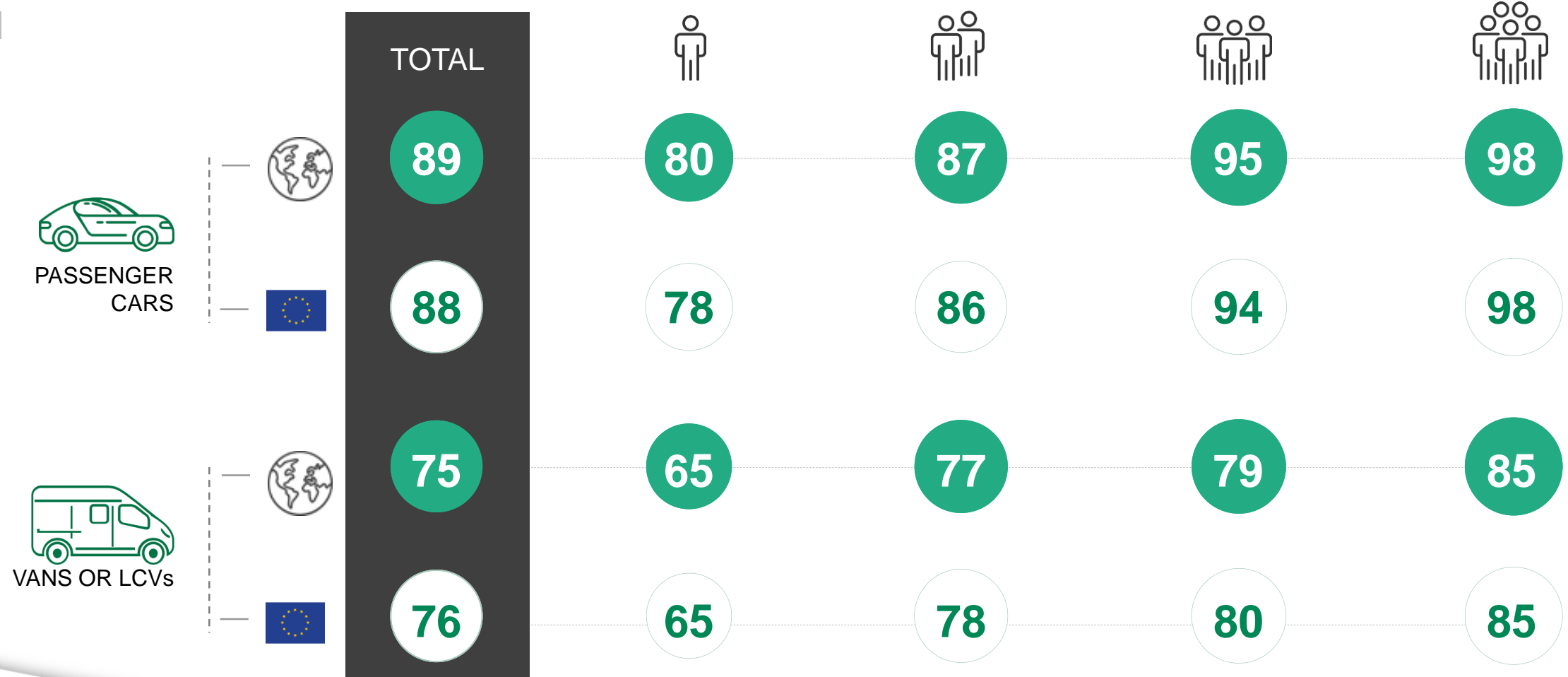
392 424

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

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

(among companies with at least one vehicle in fleet)

In %



Basis: companies with corporate vehicles = 100%

# NUMBER OF VEHICLES IN FLEET

Focus on 1 to 99

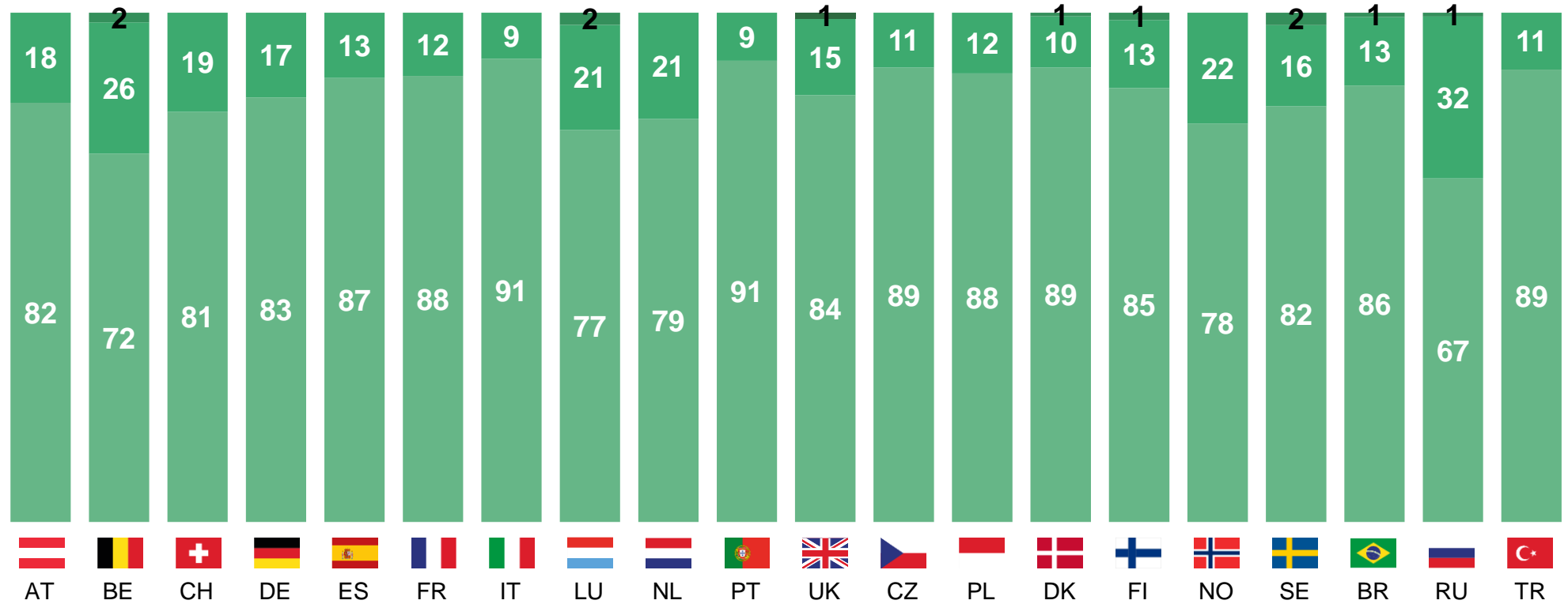
In %



Passenger cars + LCVs



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



Can you please tell me 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

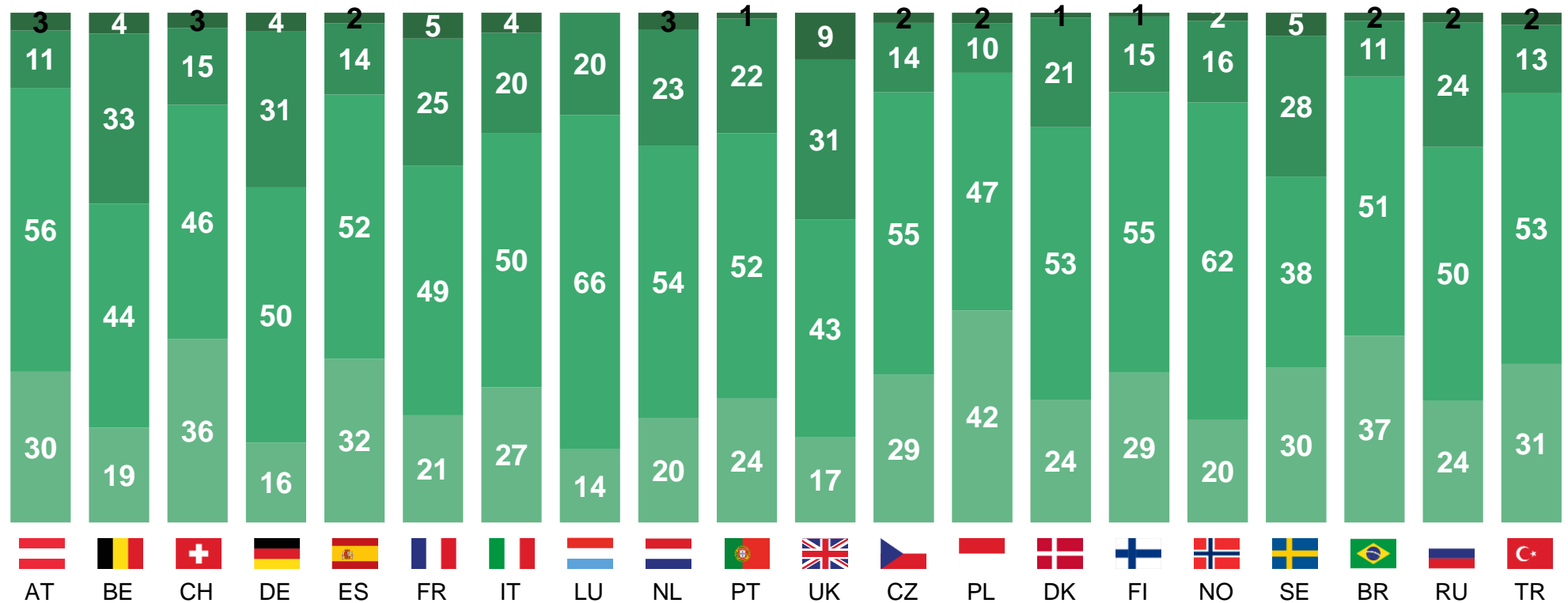
In %



Passenger cars + LCVs



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



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

# NUMBER OF PASSENGER CARS IN FLEET

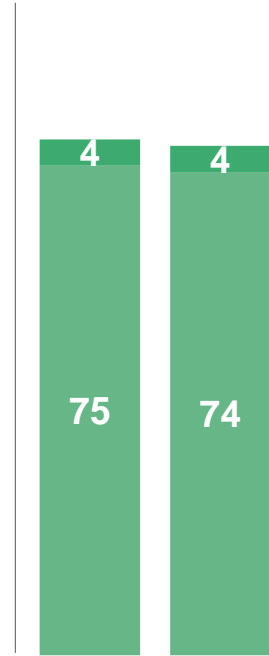
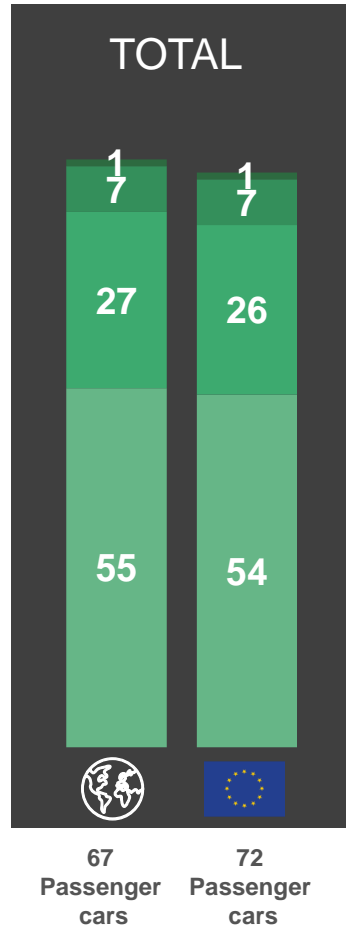
In %



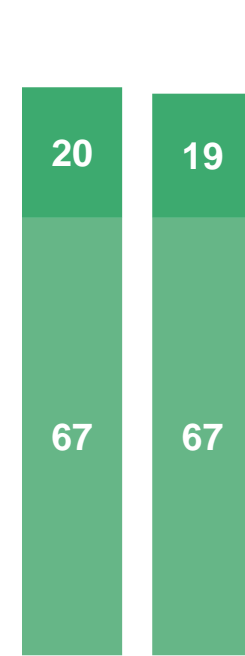
Passenger cars

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

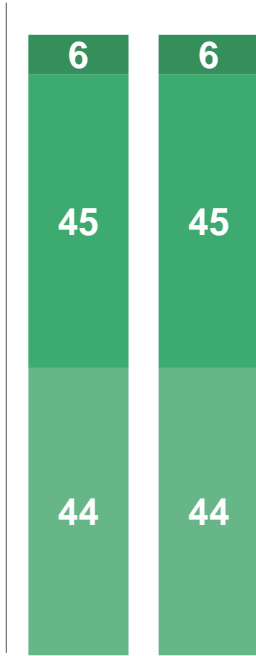
Average number of passenger cars



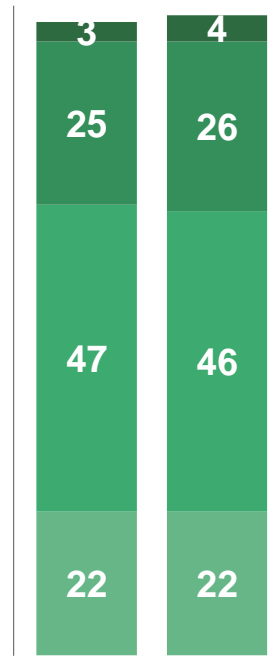
3 3



24 27



30 31



268 287

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

# NUMBER OF PASSENGER CARS IN FLEET

Focus on 1 to 99

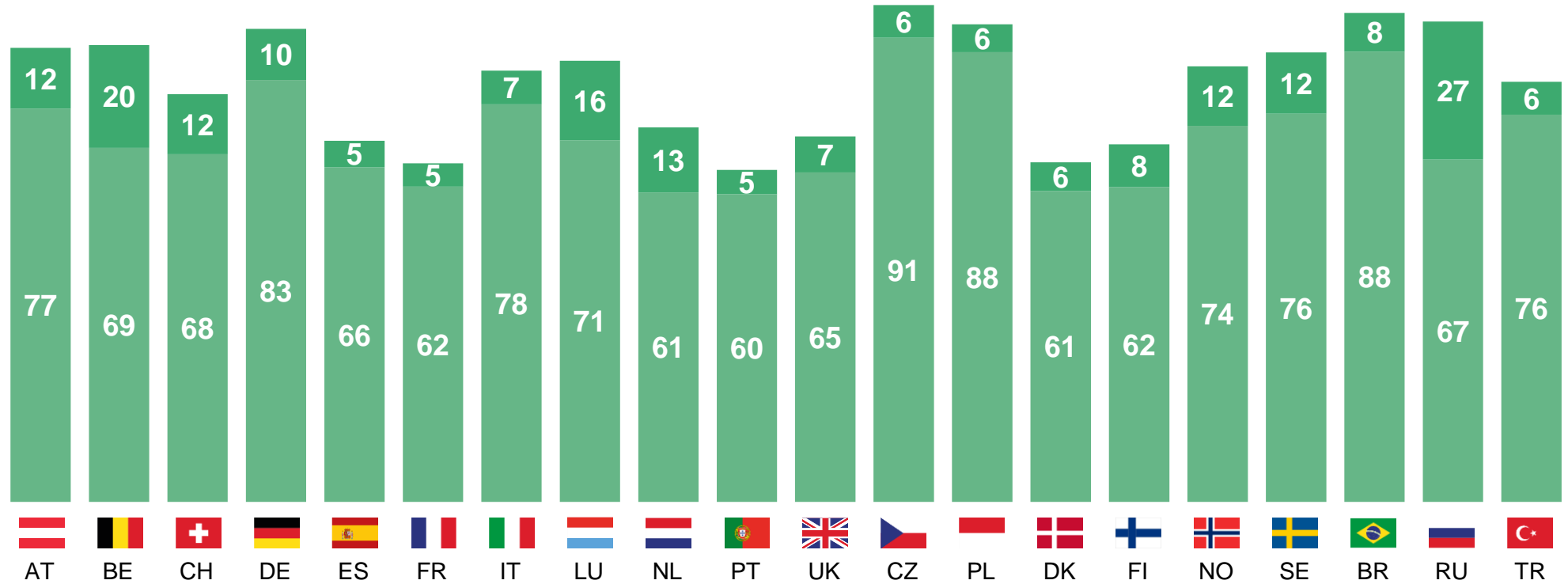
In %



Passenger cars



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



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

# NUMBER OF PASSENGER CARS IN FLEET

Focus on 100 and more

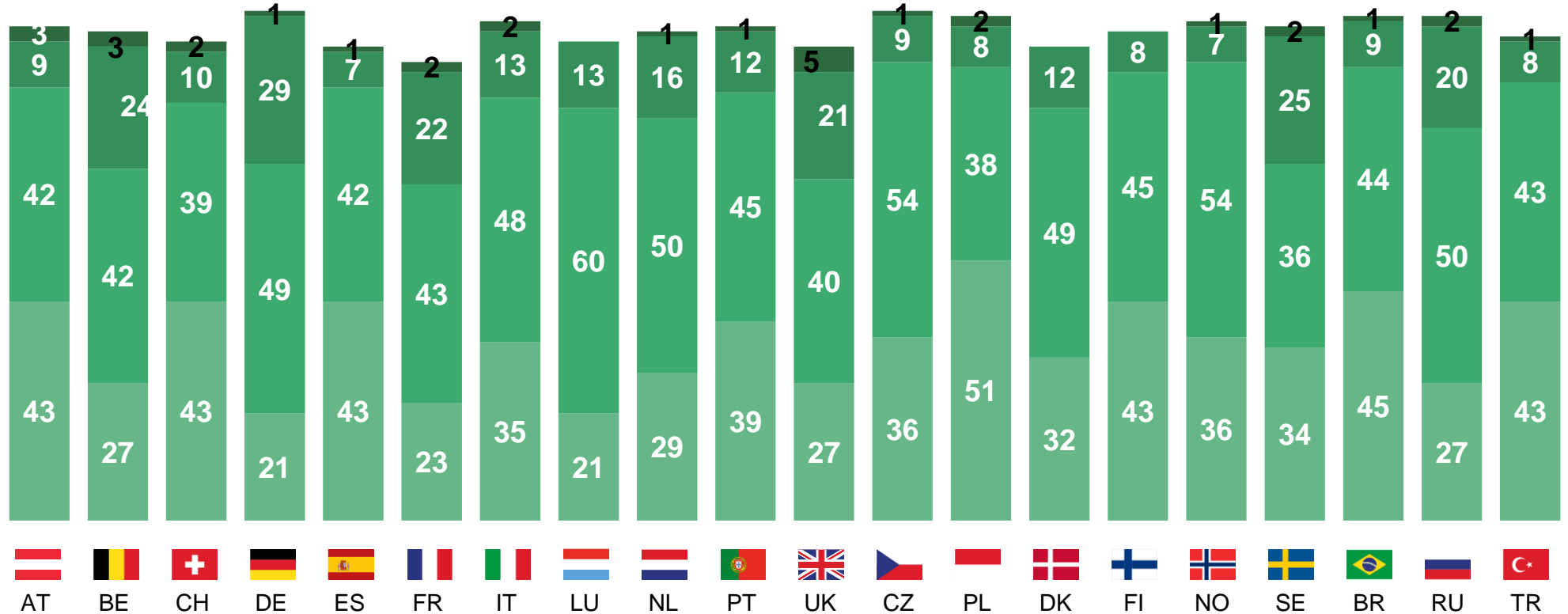
In %



Passenger cars



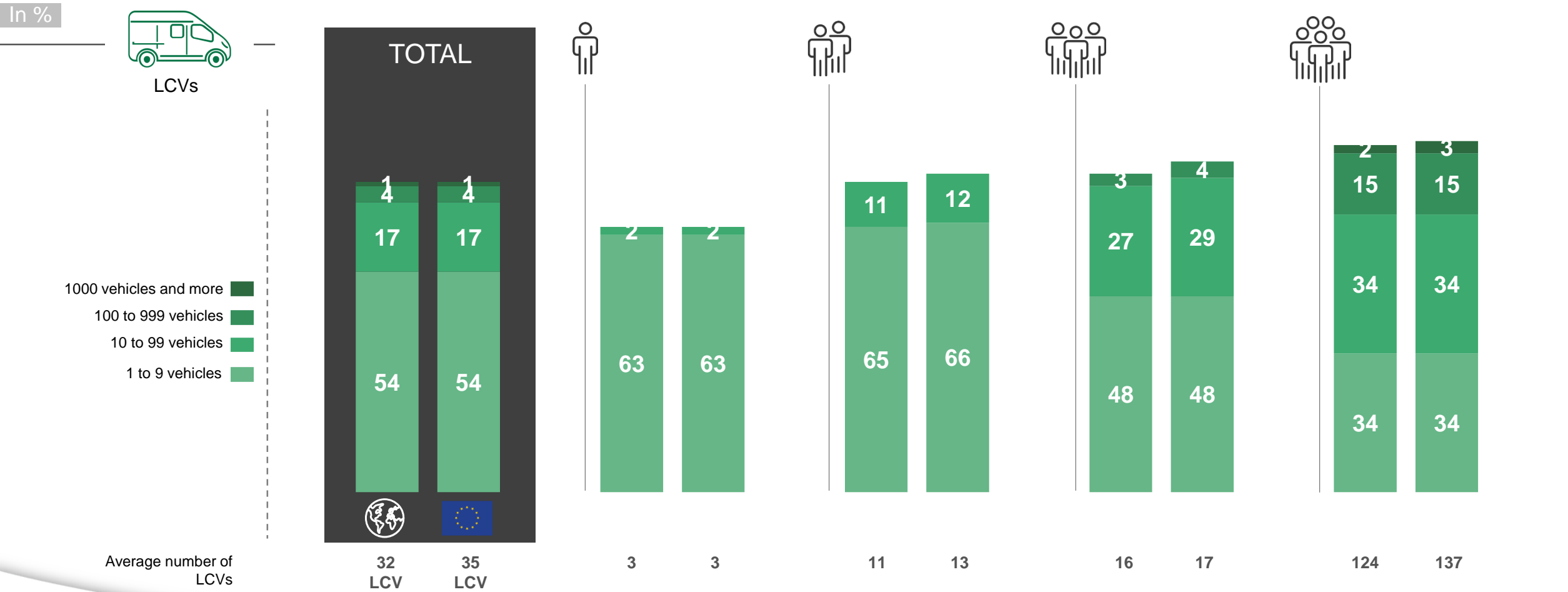
1000 vehicles and more  
 100 to 999 vehicles  
 10 to 99 vehicles  
 1 to 9 vehicles



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



# NUMBER OF LCVS IN FLEET



And can you please tell me 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

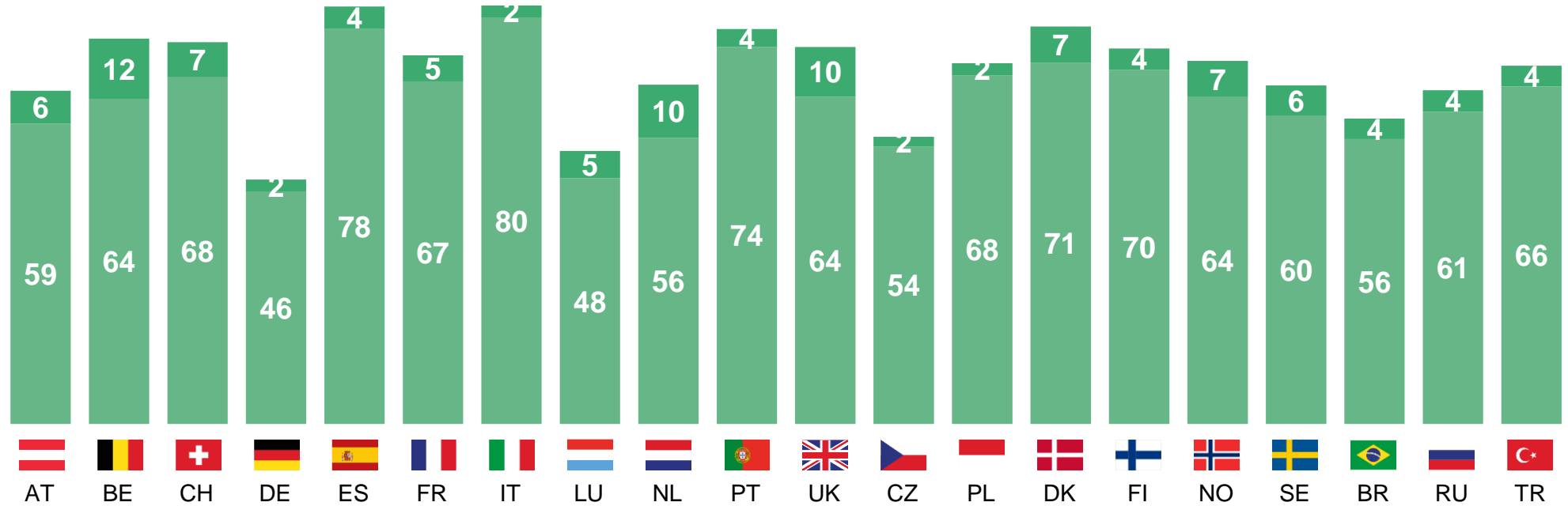
In %



LCVs



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



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

# NUMBER OF LCVS IN FLEET

Focus on 100 and more

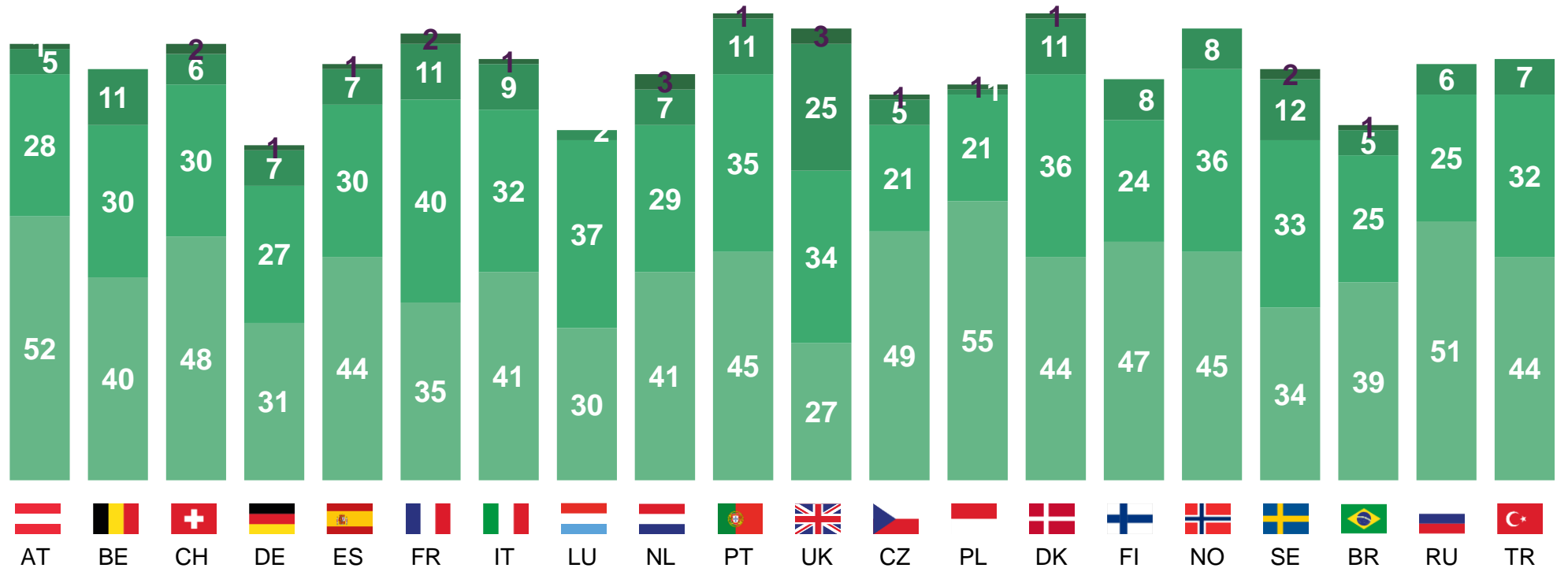
In %



LCVs



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

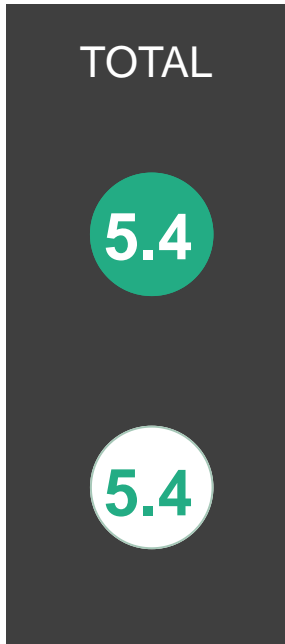


Can you please tell me the total number of vehicles of less than 3.5 tons in your fleet?  
 Basis: companies with corporate vehicles = 100%

# VEHICLE POSSESSION LENGTH



AVERAGE IN YEARS



6.1

6.2



5.3

5.5



5.0

5.0



4.9

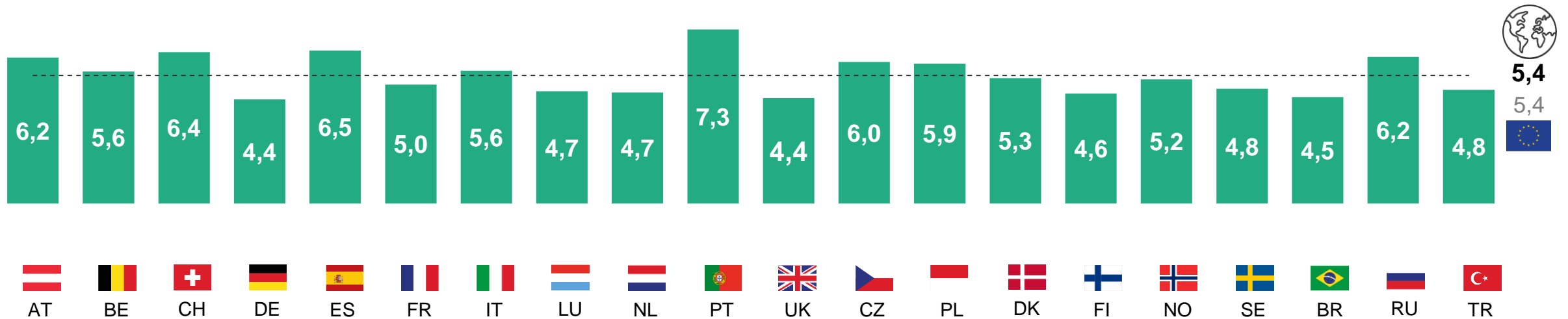
4.9

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



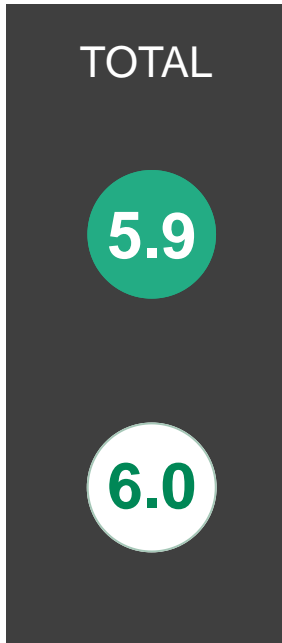
On average, how long do you keep your vehicles (before being sold or giving back to the leasing company)?  
Basis: companies with corporate vehicles = 100%

# LCVS POSSESSION LENGTH



LCVs

AVERAGE IN YEARS

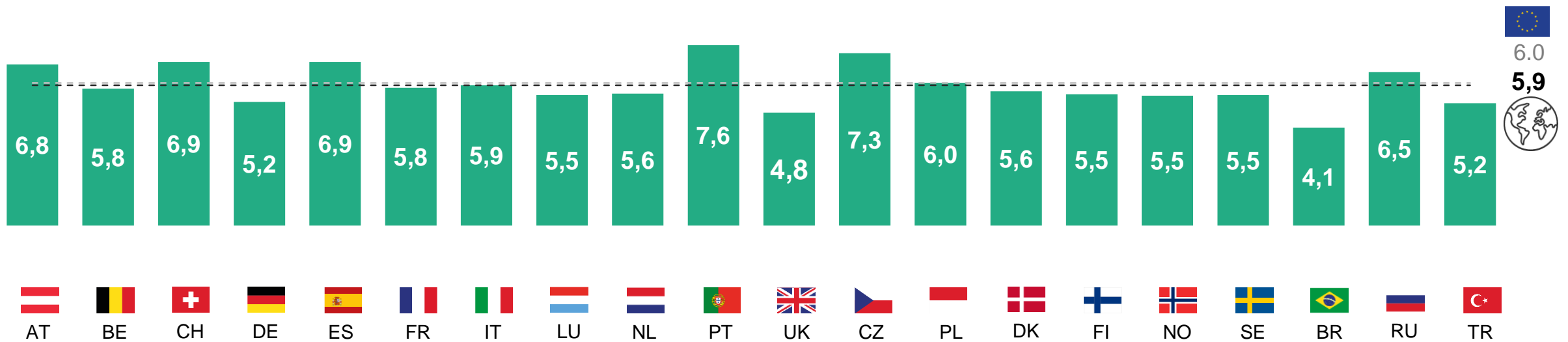


And how long do you keep your LCV, light commercial vehicles or vans (before being sold or giving back to the leasing company)?  
Basis: companies with LCVS= 100 %

# LCV POSSESSION LENGTH



LCVs



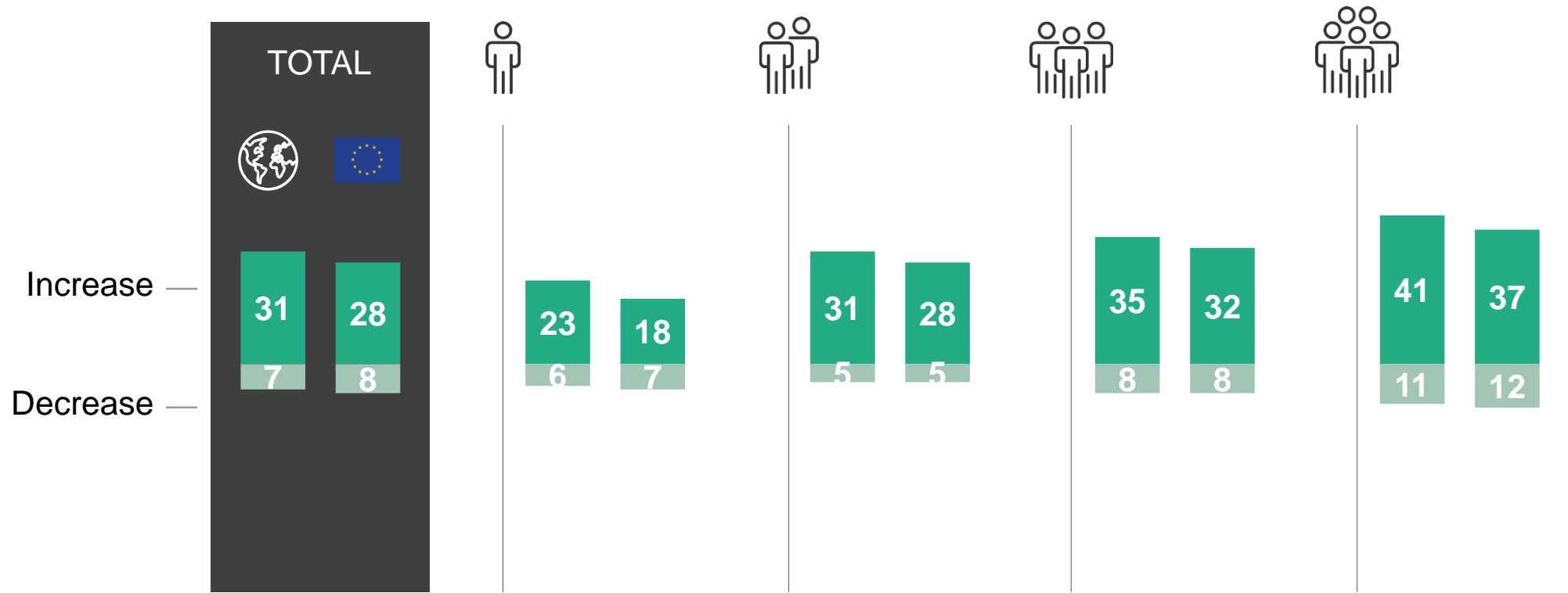
On average, how long do you keep your vehicles (before being sold or giving back to the leasing company)?  
Basis: companies with corporate vehicles = 100%

# FLEET GROWTH POTENTIAL

In %



Passenger cars + LCVs



BALANCE in pts (INCREASE ⊖ DECREASE)



Year	Americas	Europe	Company Size 1	Company Size 2	Company Size 3	Company Size 4+
2020	+24	+20	+17	+12	+26	+23
2019	+11	+11	+6	+6	+12	+11

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%

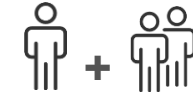


# FLEET GROWTH POTENTIAL

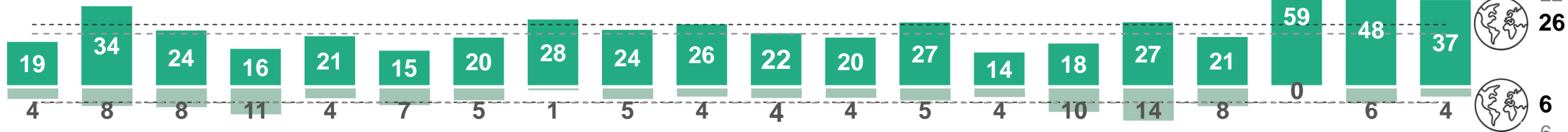
In %



Passenger cars + LCVs



## Increase



## Decrease



BALANCE in pts (INCREASE ⊖ DECREASE)

Year	AT	BE	CH	DE	ES	FR	IT	LU	NL	PT	UK	CZ	PL	DK	FI	NO	SE	BR	RU	TR
2020	+14	+26	+15	+4	+17	+8	+15	+27	+19	+23	+18	+16	+22	+10	+8	+13	+13	+59	+42	+33
2019	-	+8	+8	+7	+5	+9	+5	+17	+5	+6	+10	+0	+13	-	-	-	-	-	-	+16

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

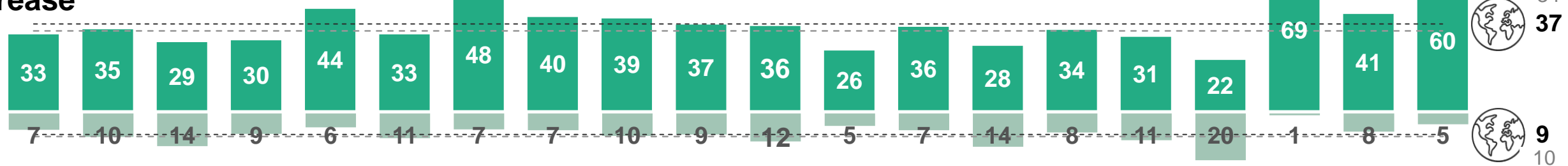
In %



Passenger cars + LCVs



## Increase



## Decrease



BALANCE in pts (INCREASE ⊖ DECREASE)

Year	AT	BE	CH	DE	ES	FR	IT	LU	NL	PT	UK	CZ	PL	DK	FI	NO	SE	BR	RU	TR	World	EU
2020	+26	+25	+15	+21	+38	+22	+41	+33	+30	+28	+24	+20	+29	+13	+26	+20	+2	+69	+34	+55	28	24
2019	-	+16	+4	+17	+14	+21	+12	+20	+15	+14	+3	+19	+20	-	-	-	-	-	-	+21	15	15

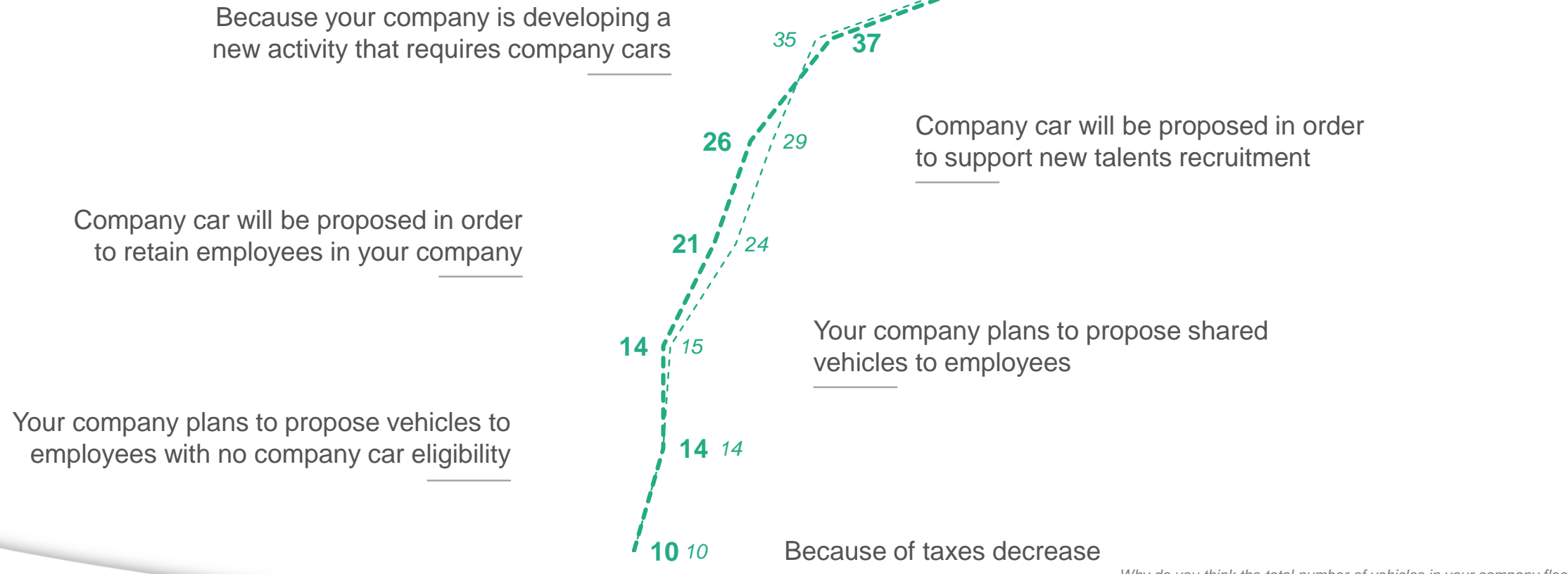
In the next three years, do you think that the total number of vehicles in your company fleet will increase, decrease or remain the same?  
Basis: companies with corporate vehicles = 100%

# REASONS FOR FLEET FUTURE INCREASE

In %



Passenger cars + LCVs



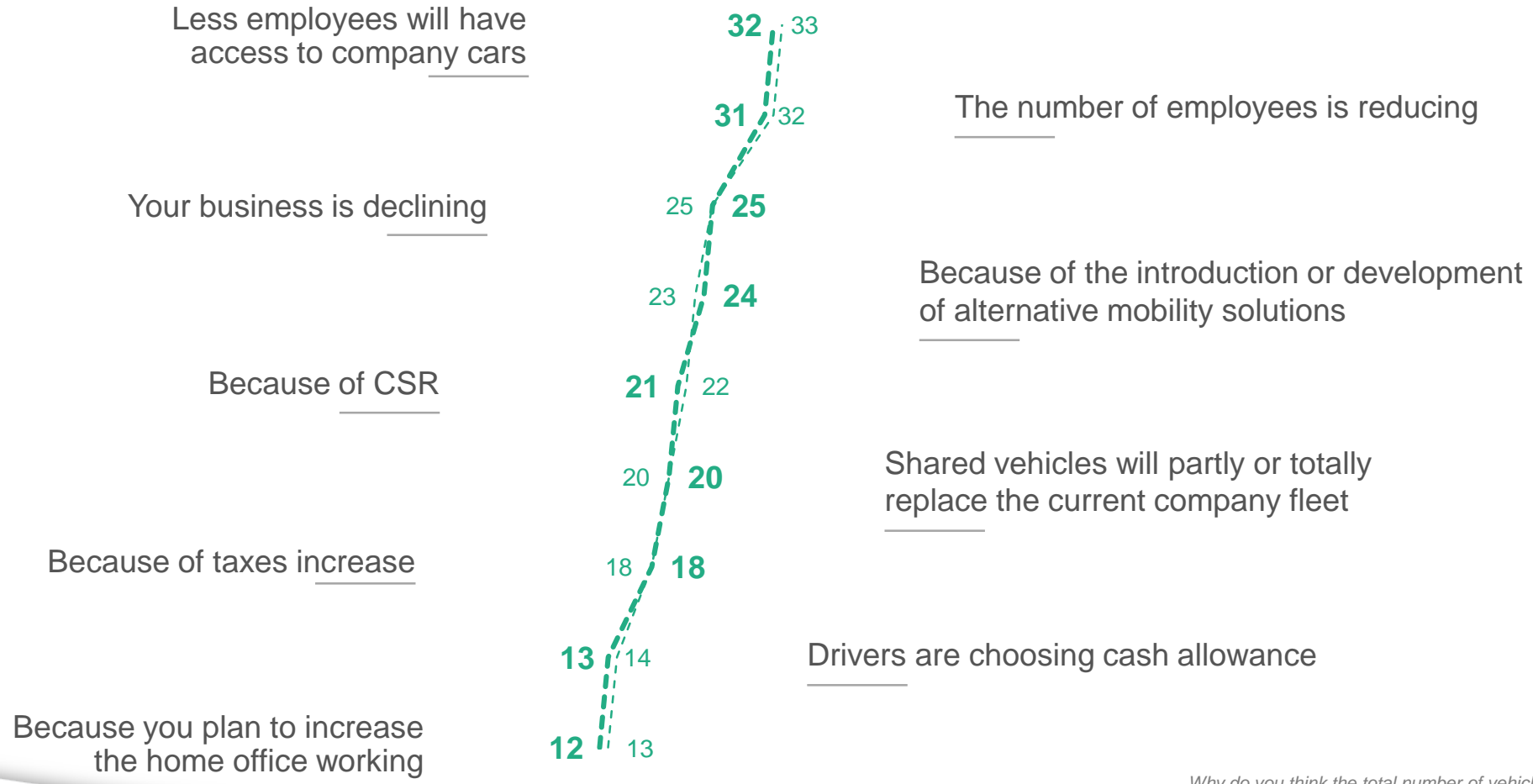
Why do you think the total number of vehicles in your company fleet will increase?  
Basis: companies expecting an increase of the fleet

# REASONS FOR FLEET FUTURE DECREASE



Passenger cars + LCVs

In %



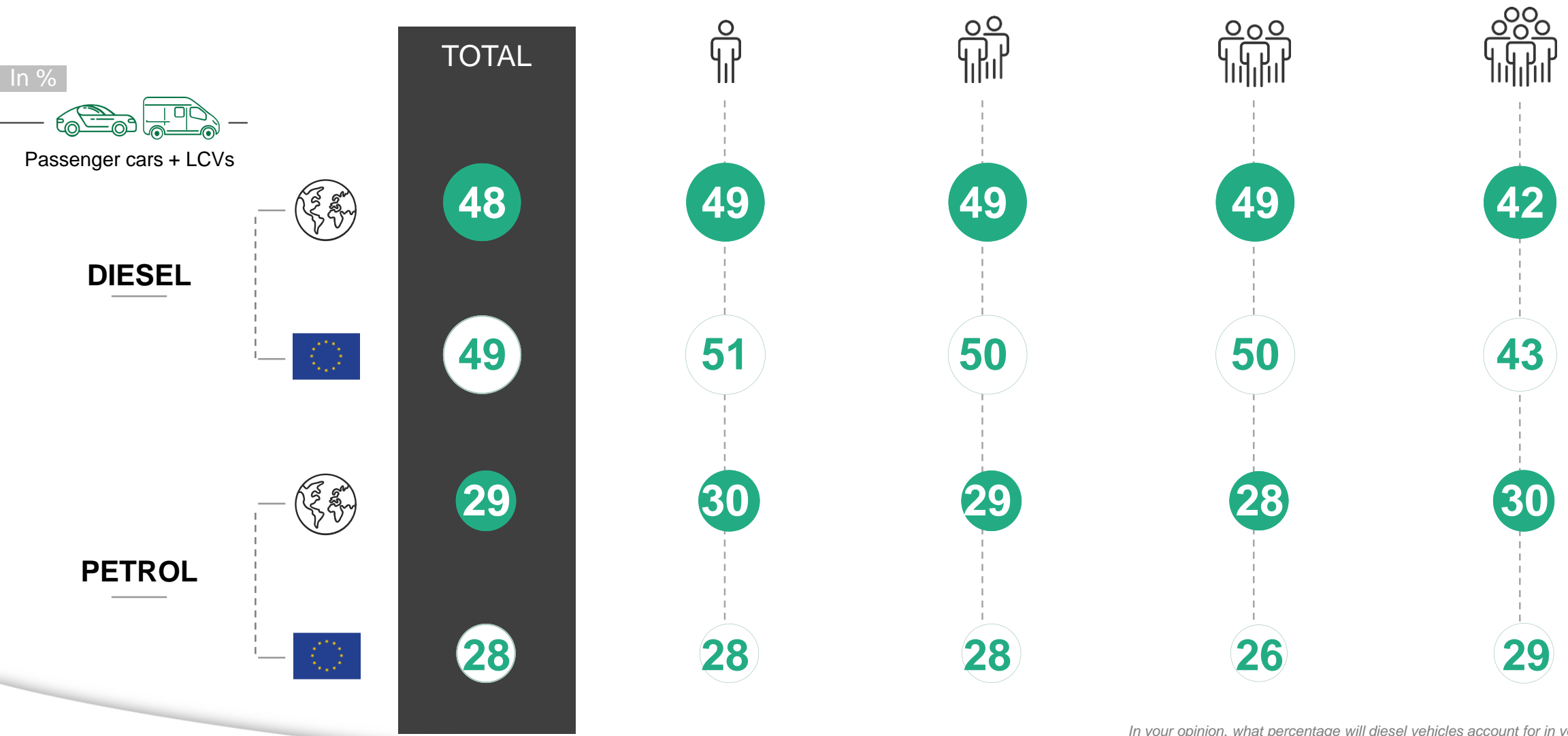
Why do you think the total number of vehicles in your company fleet will decrease?  
Basis: companies expecting a decrease of the fleet



3

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

# EXPECTED PART OF PETROL AND DIESEL IN 3 YEARS



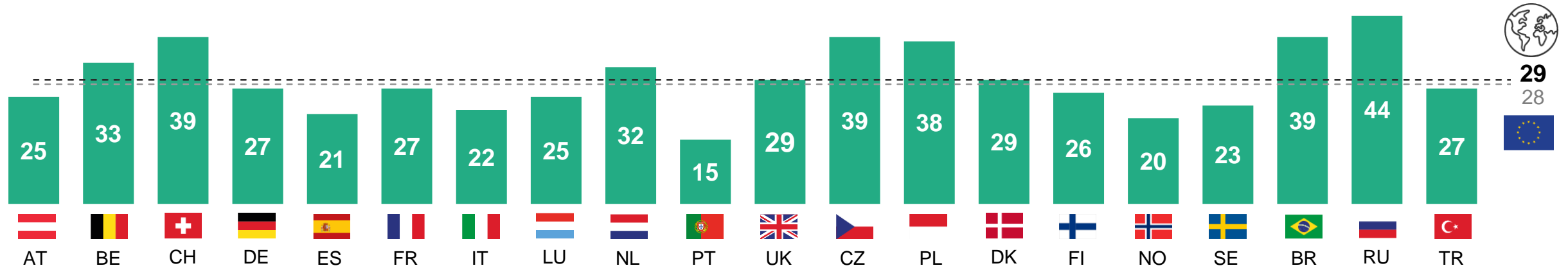
In your opinion, what percentage will diesel vehicles account for in your fleet in 3 years?  
 In your opinion, what percentage will petrol vehicles account for in your fleet in 3 years?  
 Basis: companies with corporate vehicles = 100%

# EXPECTED PART OF PETROL (IN 3 YEARS)

In %



Passenger cars + LCVs



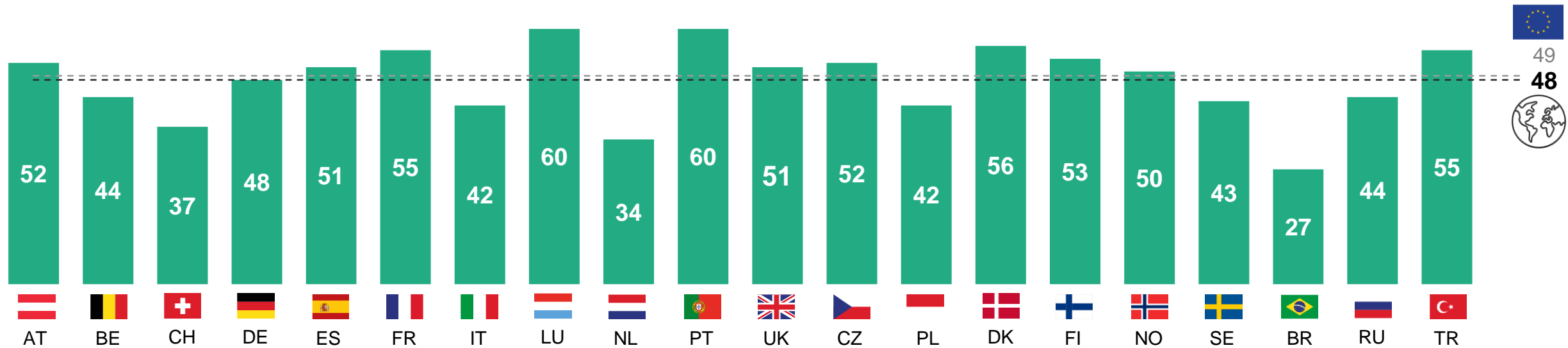
*In your opinion, what percentage will petrol vehicles account for in your fleet in 3 years?  
Basis: companies with corporate vehicles = 100%*

# EXPECTED PART OF DIESEL (IN 3 YEARS)

In %



Passenger cars + LCVs



*In your opinion, what percentage will diesel vehicles account for in your fleet in 3 years?  
Basis: companies with corporate vehicles = 100%*



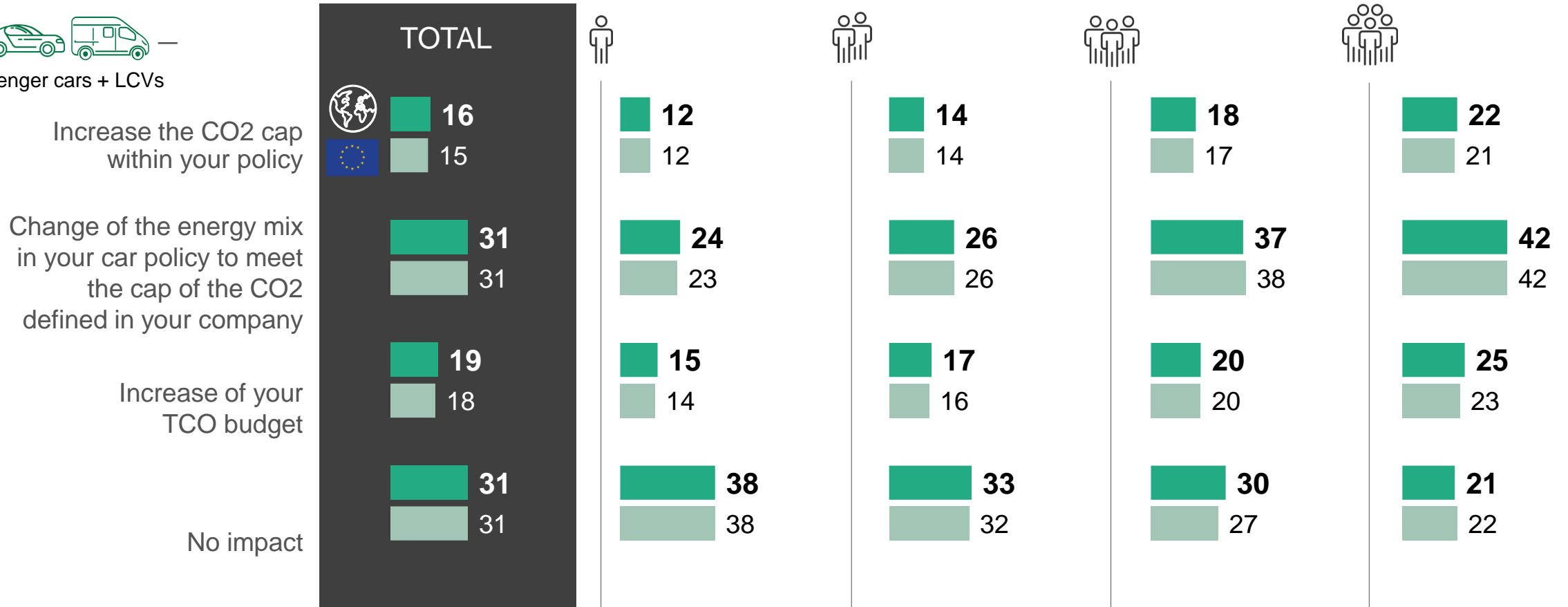
# FOCUS WLTP

## Actions to be taken to adapt WLTP

In %



Passenger cars + LCVs



Today, fuel consumption and CO2 emissions are determined with a new, more realistic test cycle: the WLTP-test  
 What actions will be taken to adapt to the WLTP-test?  
 Basis: companies with corporate vehicles = 100%

# CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

## At least one technology

In %



Passenger cars + LCVs



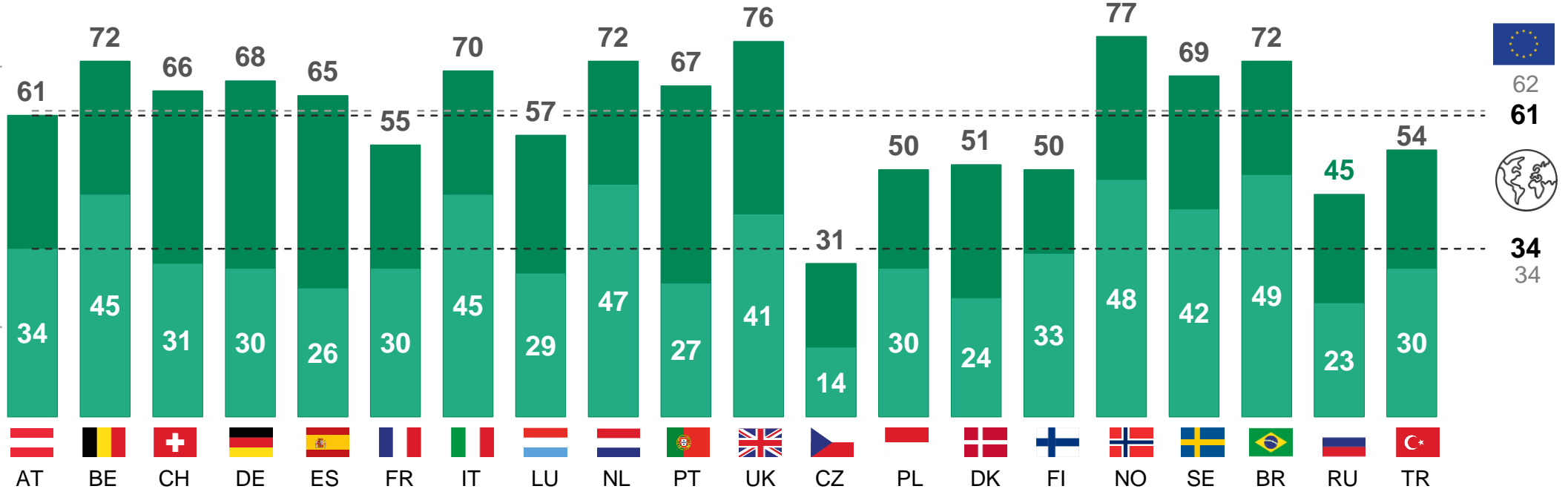
ALREADY  
IMPLEMENTED  
OR CONSIDER  
NEXT 3 YEARS



ALREADY  
IMPLEMENTED

### HOW TO READ THE RESULTS ?

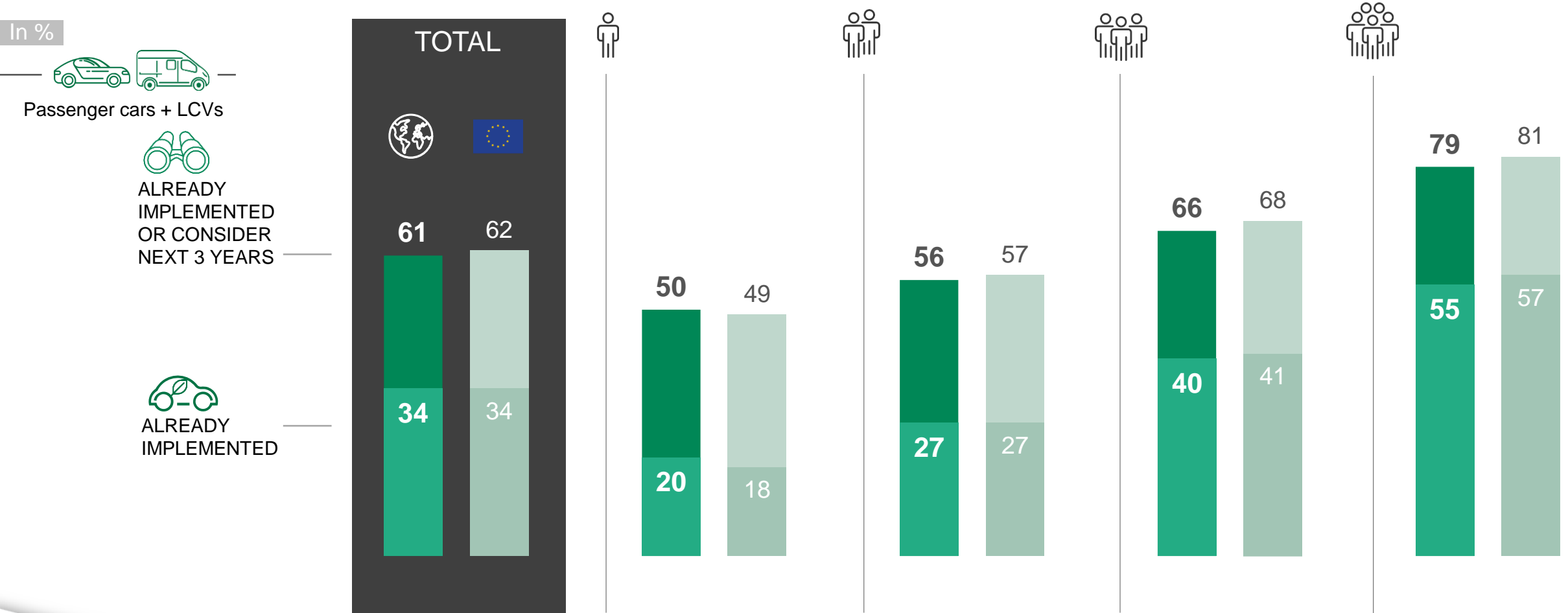
In Austria, 61% of the companies have already implemented or consider to implement at least one alternative technology in the next 3 years. 34% have already implemented at least one.



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



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 %



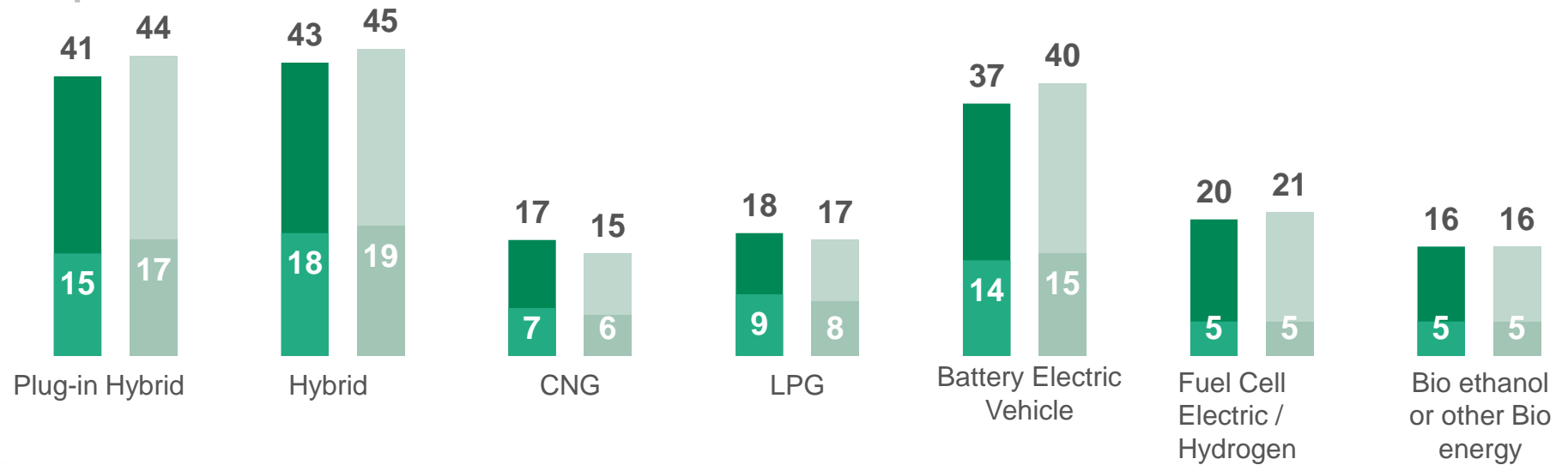
Passenger cars



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

# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

## LCV Fleet

In %



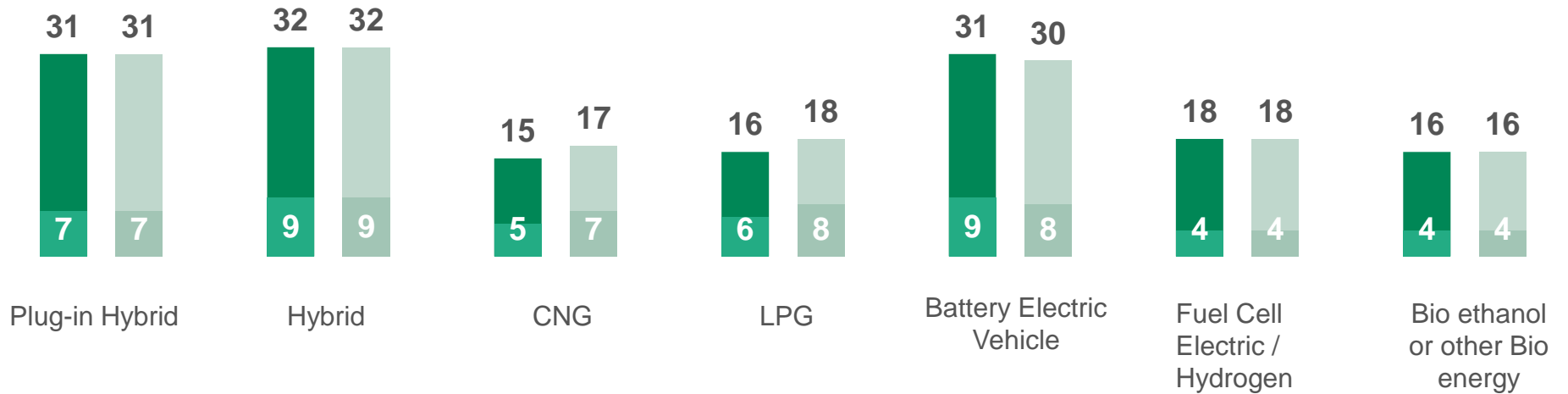
LCVs



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

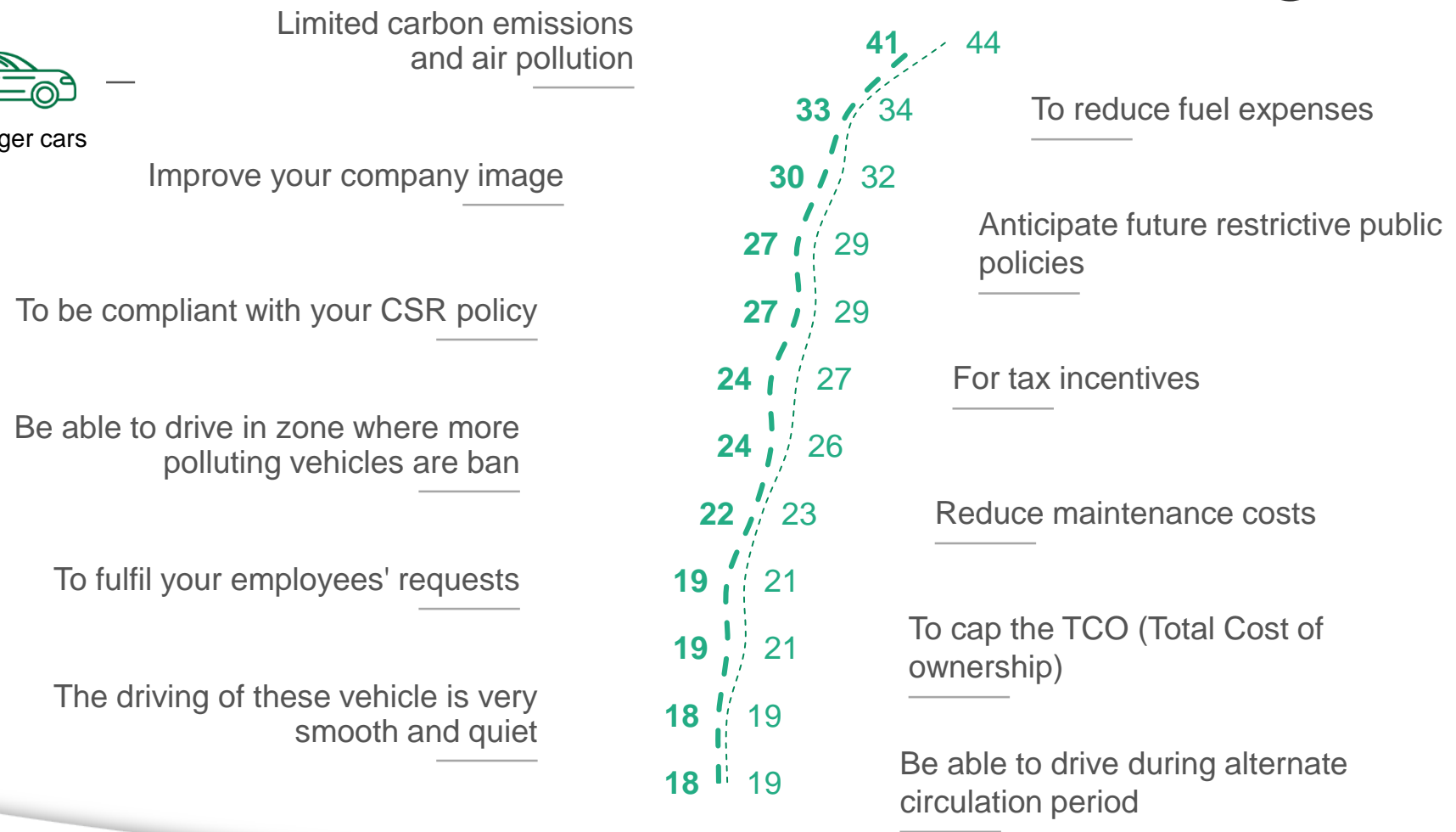
# REASONS FOR IMPLEMENTING OR CONSIDERING ALTERNATIVE FUEL TECHNOLOGIES

## Passenger car fleet

In %



Passenger cars



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

# REASONS FOR IMPLEMENTING OR CONSIDERING ALTERNATIVE FUEL TECHNOLOGIES

## LCV fleet

In %



LCVs

Limited carbon emissions and air pollution

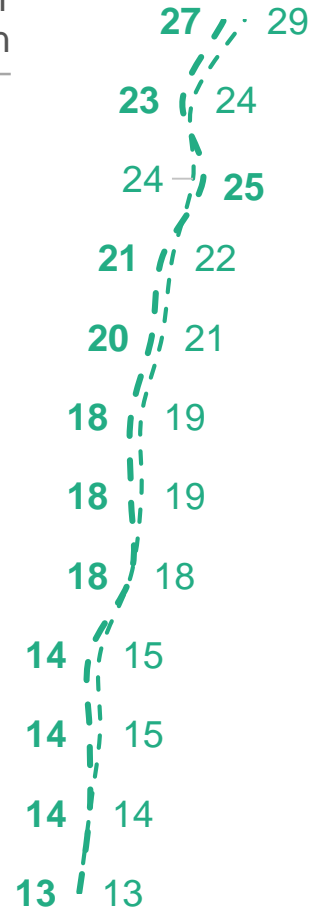
To reduce fuel expenses

To be compliant with your CSR policy

For tax incentives

Be able to drive during alternate circulation period

The driving of these vehicle is very smooth and quiet



Improve your company image

Anticipate future restrictive public policies

Be able to drive in zone where more polluting vehicles are ban

Reduce maintenance costs

To cap the TCO (Total Cost of ownership)

To fulfil your employees' requests

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



4

# ENERGY MIX

## FOCUS PER ALTERNATIVE TECHNOLOGY



# HYBRID IMPLEMENTATION

In %



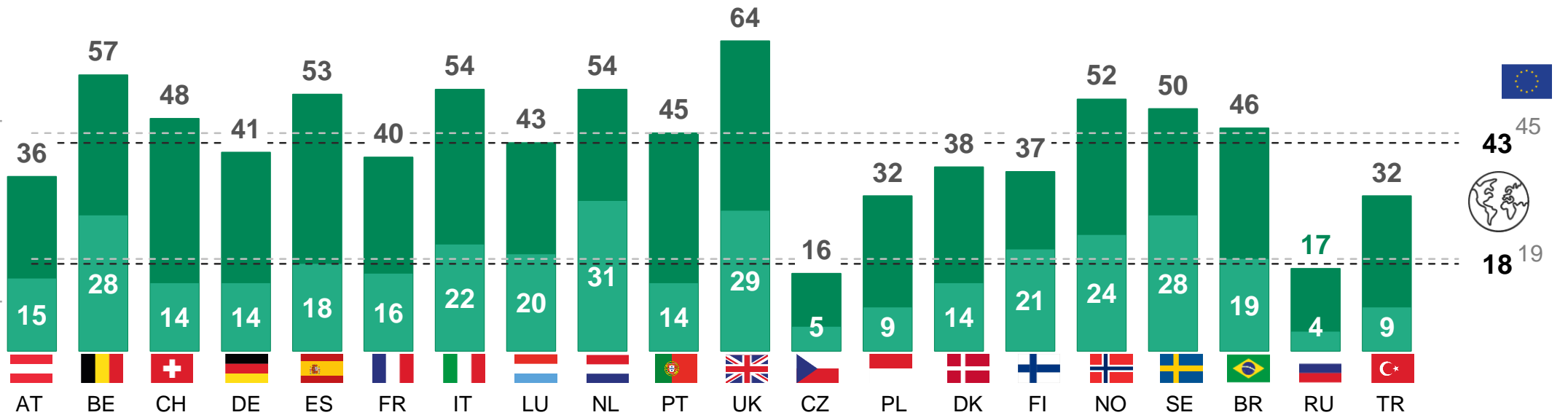
Passenger cars + LCVs



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

In %



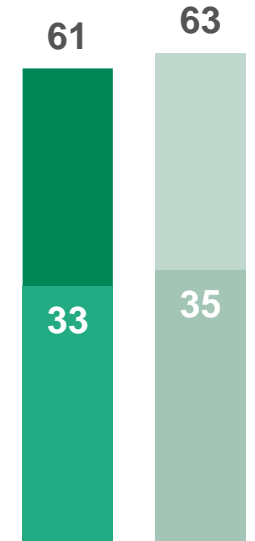
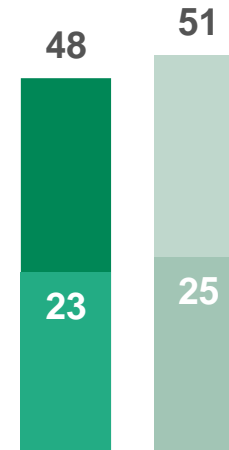
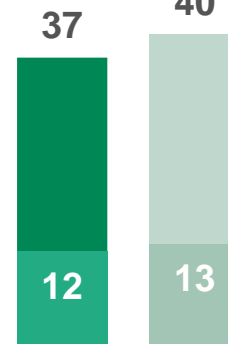
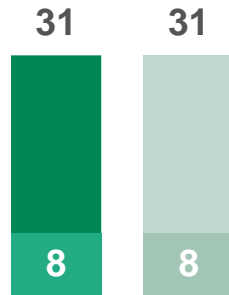
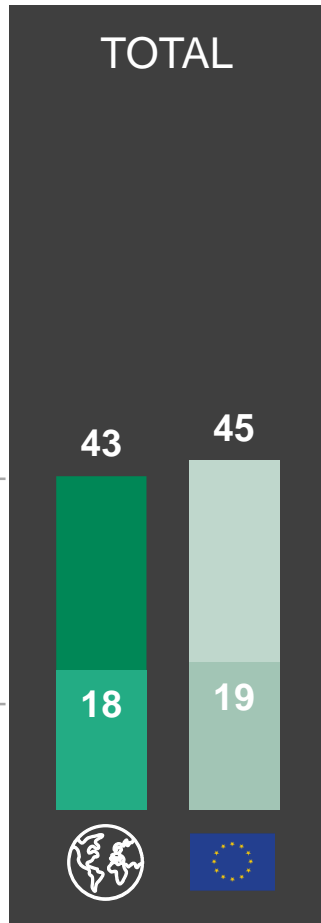
Passenger cars + LCVs



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

In %



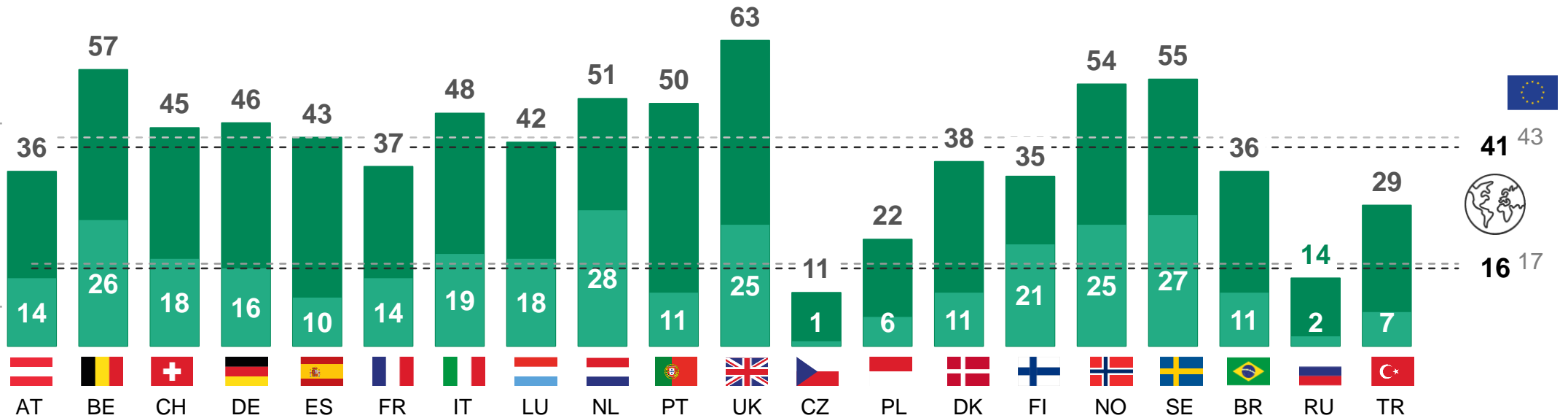
Passenger cars + LCVs



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

In %



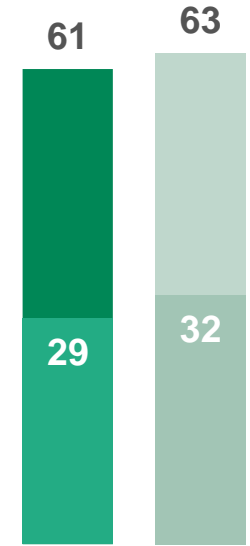
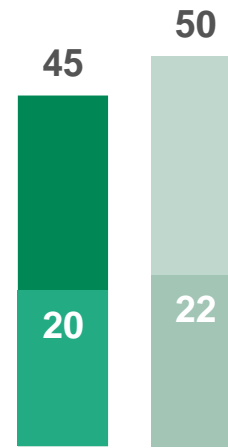
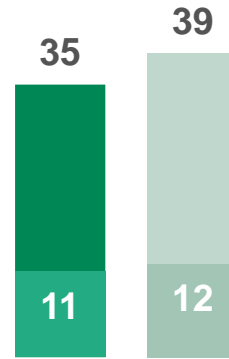
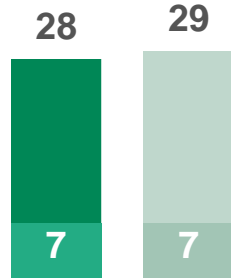
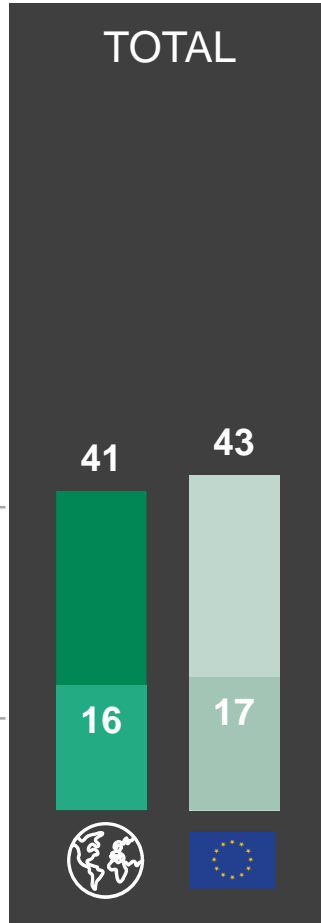
Passenger cars + LCVs



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...?  
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 Basis: companies with corporate vehicles = 100%

# CONSTRAINTS OF PLUG IN HYBRID IMPLEMENTATION

In %



Passenger cars + LCVs

30

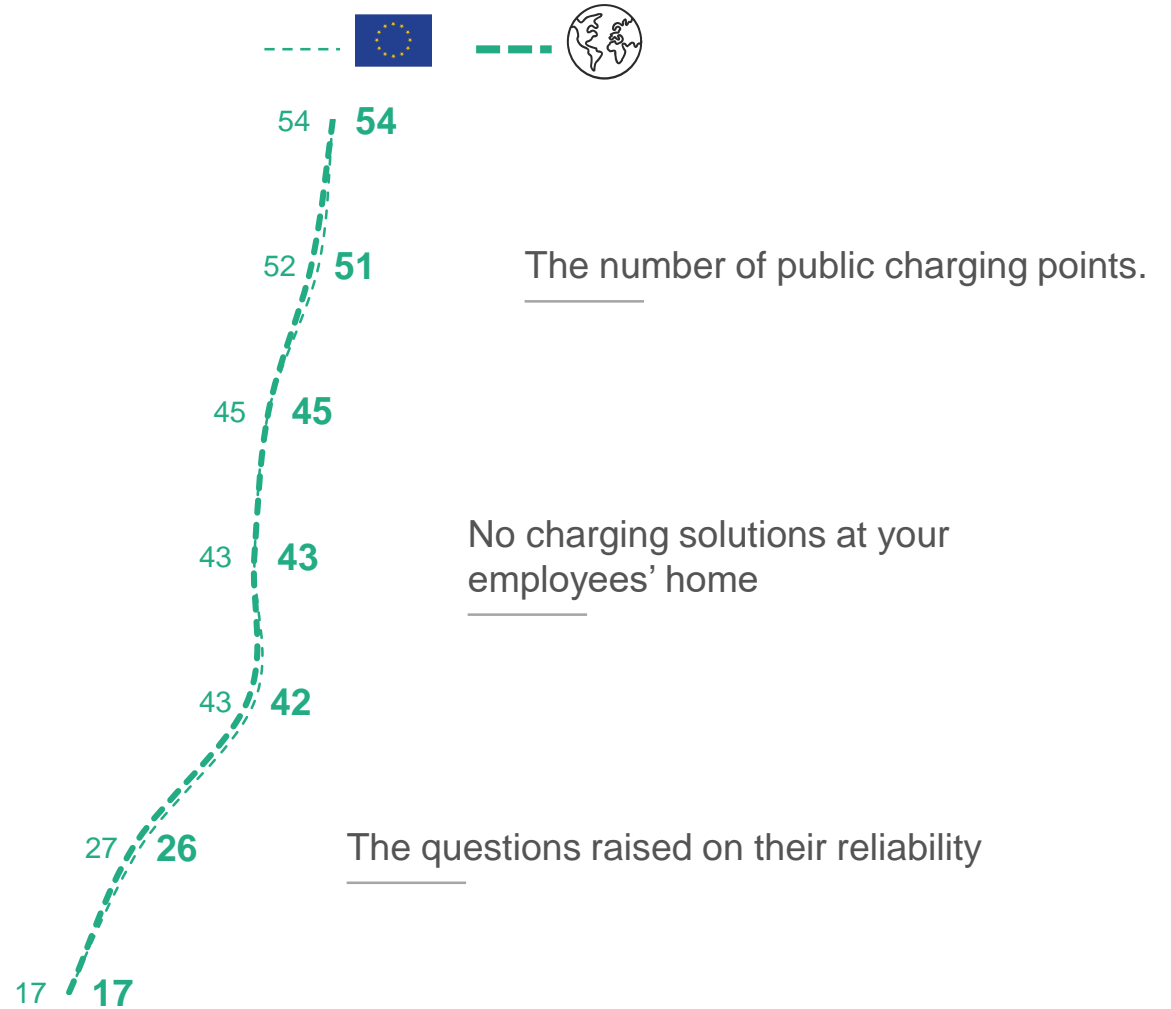
do not consider implementing plug-in Hybrid vehicles

Your employee's reluctance to drive such vehicles

The range of models is limited for this type of vehicles

No charging points at your company offices

The purchase price is higher than a regular fuel car



What are the constraints of using plug-in hybrid vehicles?  
Basis: companies not considering plug-in hybrid vehicles

# 100% BATTERY ELECTRIC IMPLEMENTATION

In %



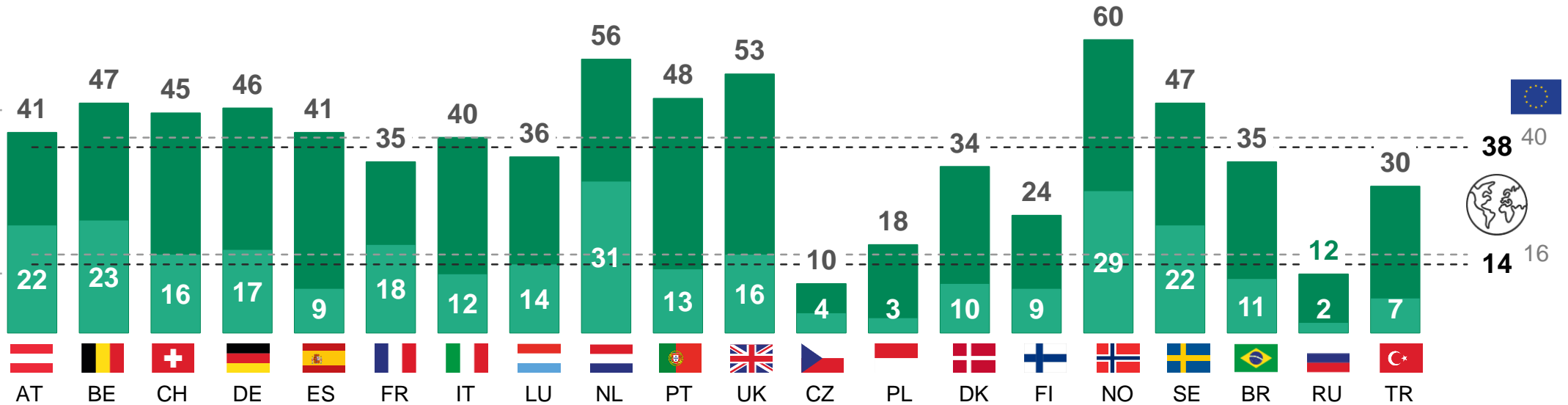
Passenger cars + LCVs



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY IMPLEMENTED



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

# 100% BATTERY ELECTRIC IMPLEMENTATION

In %



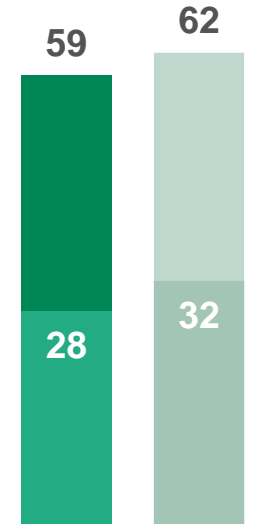
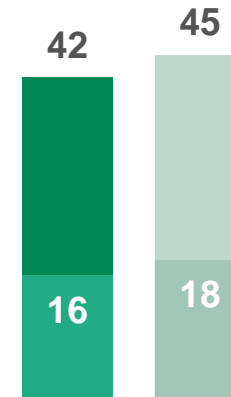
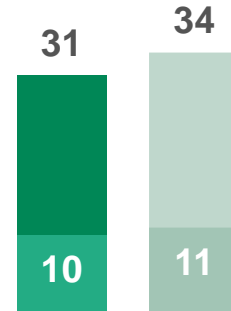
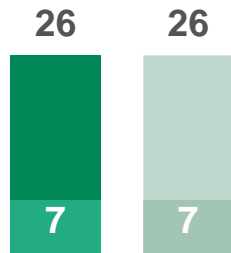
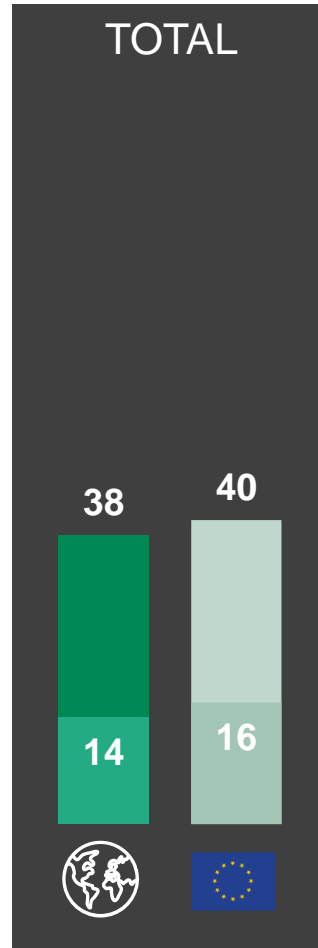
Passenger cars + LCVs



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%

# CONSTRAINTS OF 100% BATTERY ELECTRIC IMPLEMENTATION

In %



Passenger cars + LCVs

32

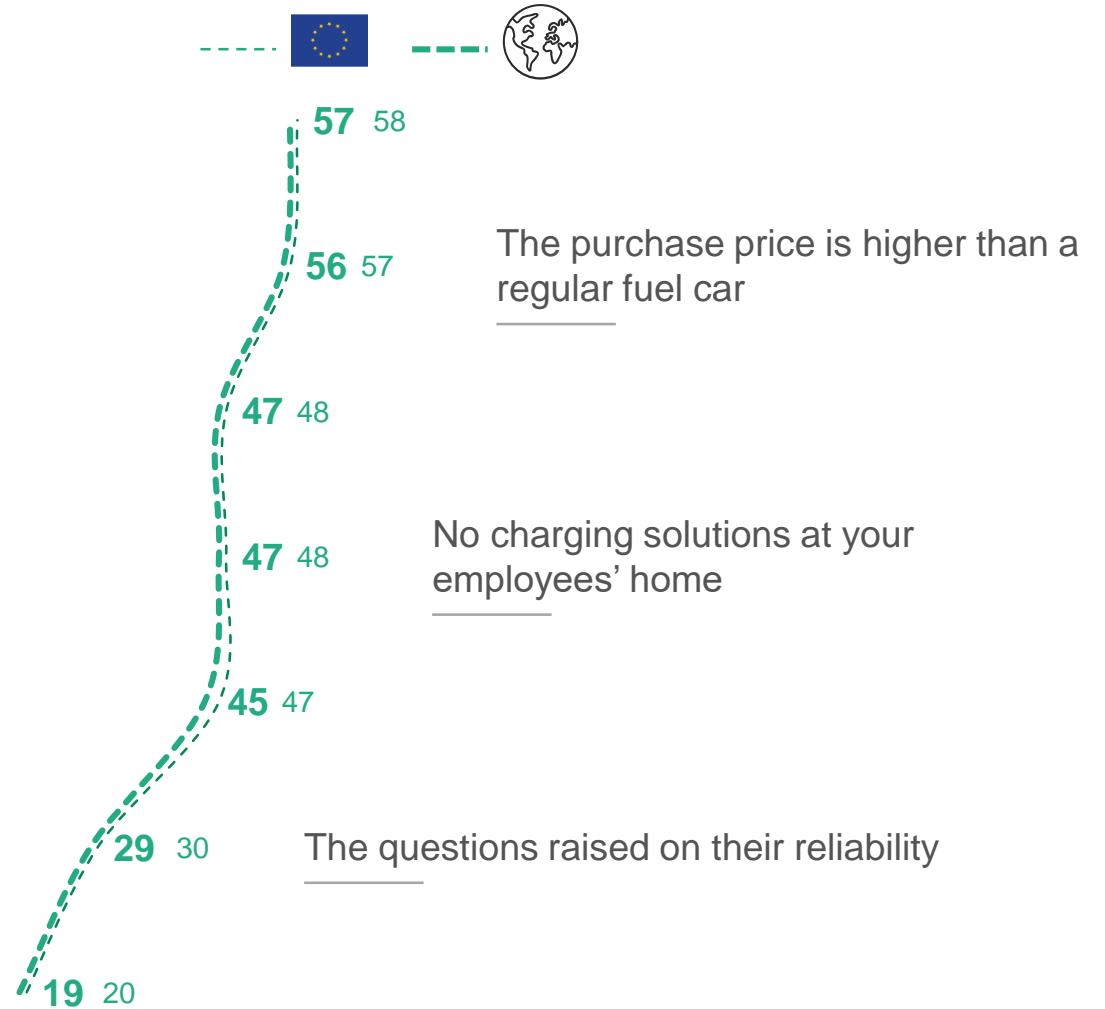
do not consider implementing battery electric vehicles

Your employee's reluctance to drive such vehicles

The range of models is limited for this type of vehicles

No charging points at your company offices

The number of public charging points.



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



# FUEL CELL ELECTRIC IMPLEMENTATION

In %



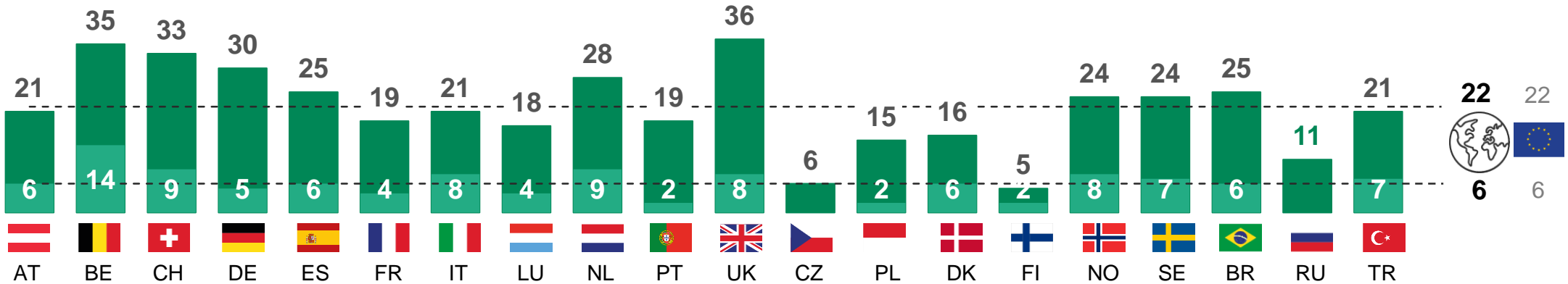
Passenger cars + LCVs



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY IMPLEMENTED



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

# FUEL CELL ELECTRIC IMPLEMENTATION

In %



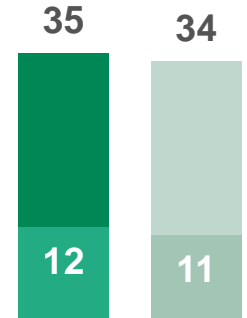
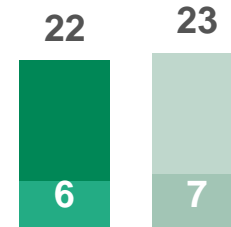
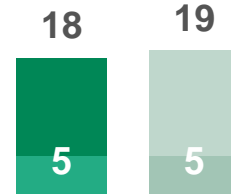
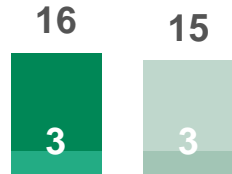
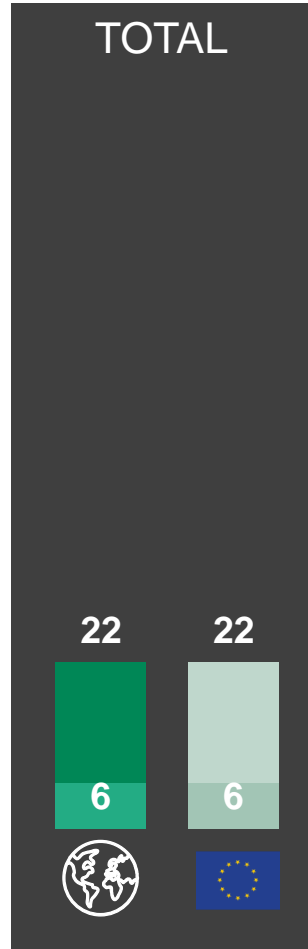
Passenger cars + LCVs



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY IMPLEMENTED



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

# CNG IMPLEMENTATION

In %



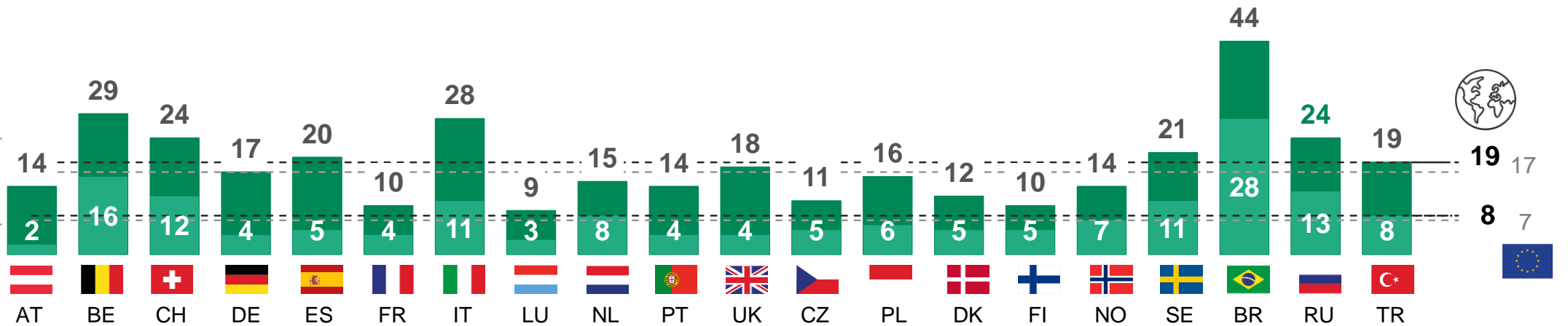
Passenger cars + LCVs



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%

# CNG IMPLEMENTATION

In %



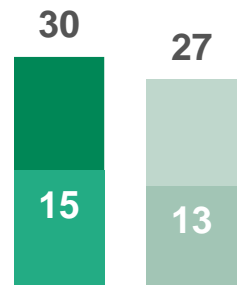
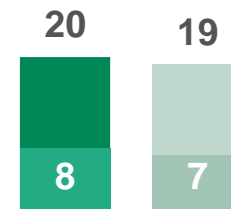
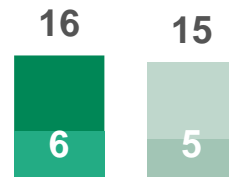
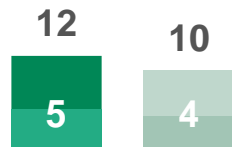
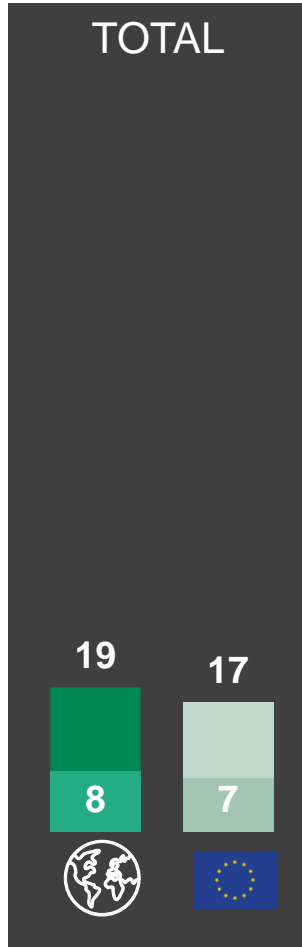
Passenger cars + LCVs



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...?  
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# LPG IMPLEMENTATION

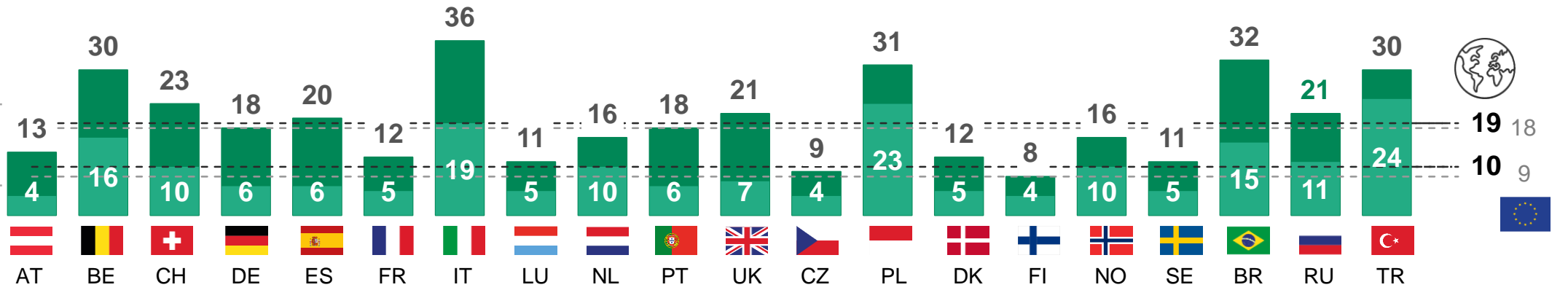
In %



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%

# LPG IMPLEMENTATION

In %



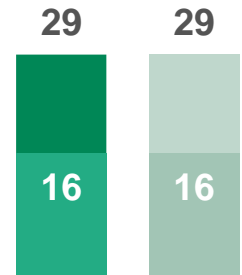
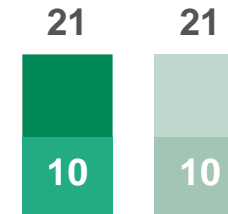
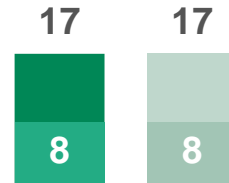
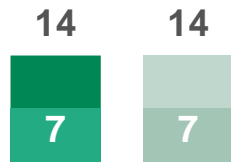
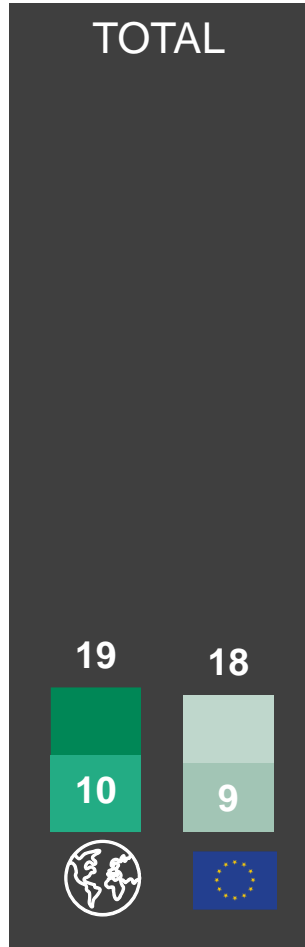
Passenger cars + LCVs



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...?  
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 Basis: companies with corporate vehicles = 100%

# BIO ETHANOL OR OTHER BIO ENERGY IMPLEMENTATION

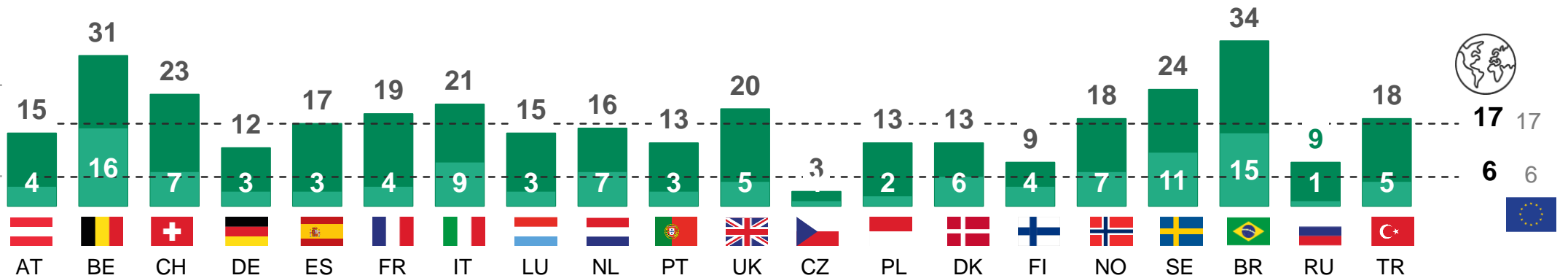
In %



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%

# BIO ETHANOL OR OTHER BIO ENERGY IMPLEMENTATION

In %



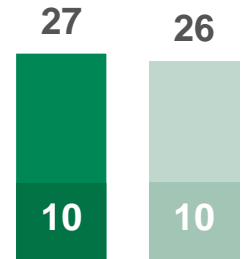
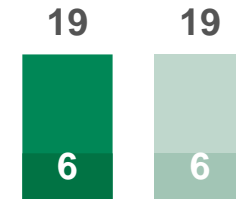
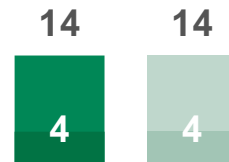
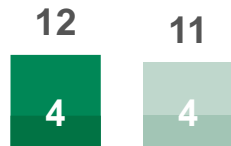
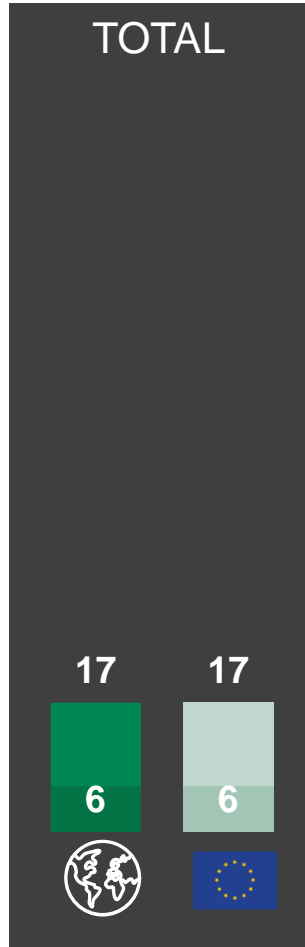
Passenger cars + LCVs



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...?  
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 Basis: companies with corporate vehicles = 100%





5

WHAT ARE THE PERSPECTIVES IN TERMS  
OF ALTERNATIVE MOBILITY SOLUTIONS ?

# MOBILITY ALTERNATIVES LIST AND DEFINITIONS



## **CORPORATE CAR SHARING:**

the company makes available upon reservation vehicles for its employees via an external solution



**MOBILITY BUDGET** within a predefined budget usually granted by the employer allowing employees to choose any mobility mode that is available on the market



**RIDE SHARING BETWEEN EMPLOYEES:** several employees in the same car for a journey to the same destination (Blablacar)



**MOBILITY CARD PROVIDED BY THE EMPLOYER:** employees can use it to book, pay, use any mobility mode available on their country (Xximo card...)



## **BIKE SHARING**



**AN APP TO BOOK MOBILITY SOLUTIONS** (travel planning, payments for your transport...)



**OTHER 2 WHEELS SOLUTIONS** (motorbike, motorized scooters,...) or micro-mobility (kick scooter)



**PRIVATE LEASE OR SALARY SACRIFICE** (by private lease we mean the fact that an employee rents or lease a car on his own behalf. By salary sacrifice I mean the fact that an employee rents or lease a car via his employer)



## **PUBLIC TRANSPORT**



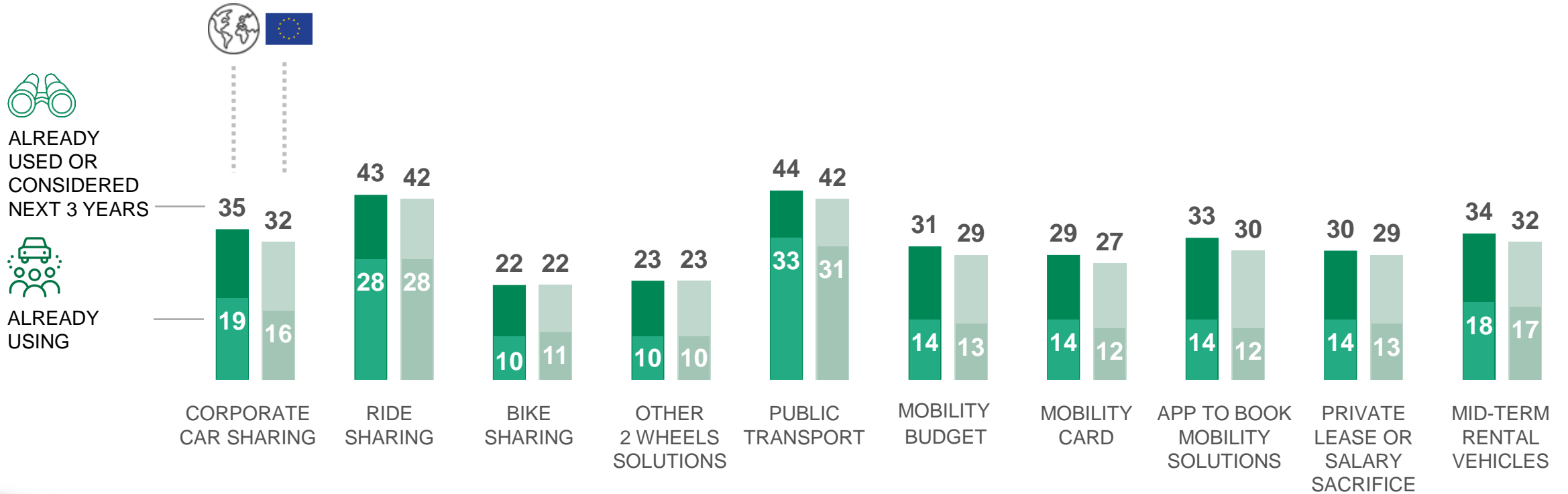
**PROVIDE MID-TERM RENTAL VEHICLES** (a rental for between 1 to 24 months) to provide transport needs for an employee

# OVERVIEW OF ALTERNATIVE MOBILITY SOLUTIONS IMPLEMENTATION

In %

**30%** of companies allow mobility solutions in their car policy

**64%** have already implemented at least one of the solutions below:



Do you allow mobility solutions in your car policy?  
 What have you already implemented and what 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%

# AT LEAST ONE ALTERNATIVE ALREADY IMPLEMENTED

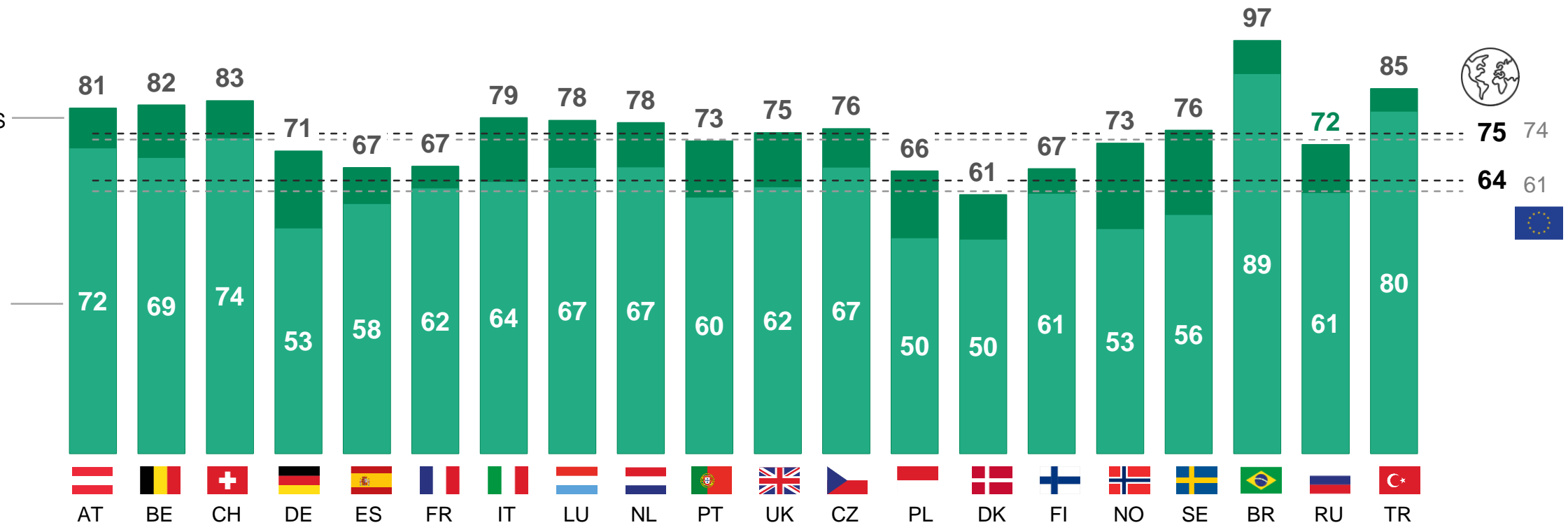
In %



ALREADY USED OR CONSIDERED NEXT 3 YEARS



ALREADY USING



What have you already implemented and what 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

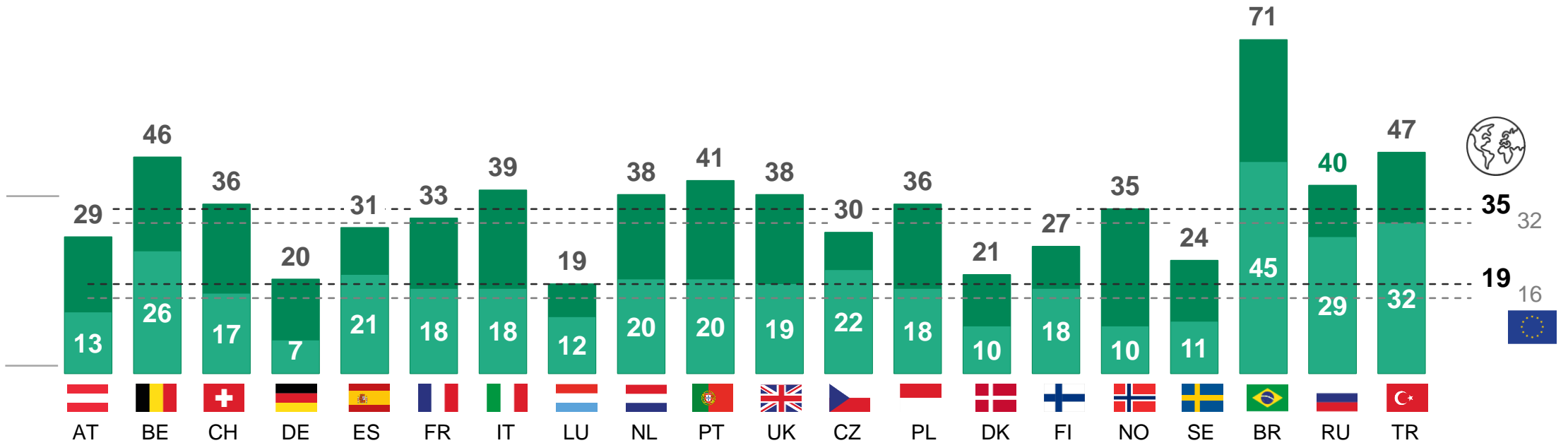
In %



ALREADY USED OR CONSIDERED NEXT 3 YEARS



ALREADY USING



What have you already implemented and what will you implement in the next 3 years?  
 Response scale: Already using, considered in the next 3 years, not interested  
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# CORPORATE CAR SHARING IMPLEMENTATION

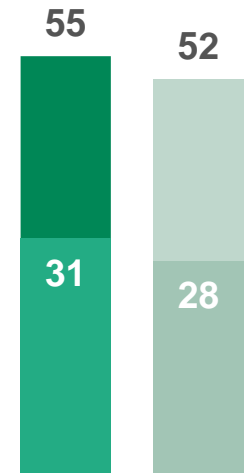
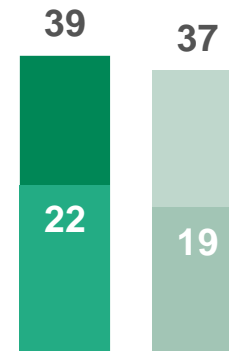
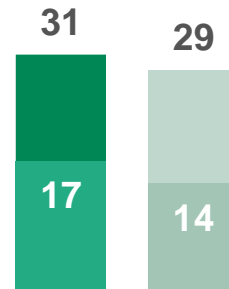
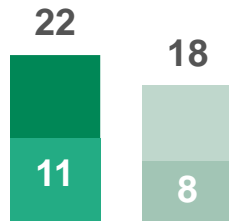
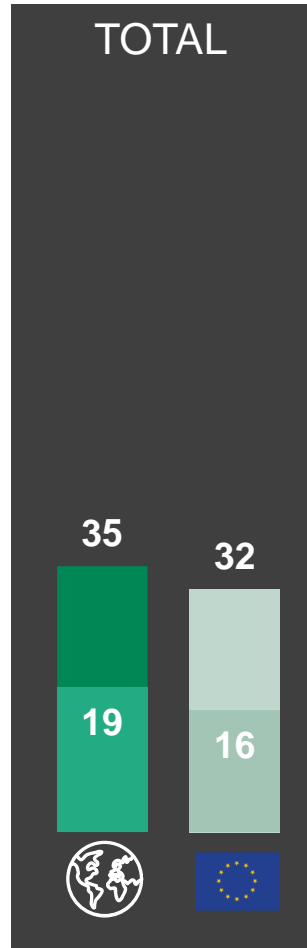
In %



ALREADY IMPLEMENTED OR USING NEXT 3 YEARS



ALREADY USING



What have you already implemented and what 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 BETWEEN EMPLOYEES IMPLEMENTATION

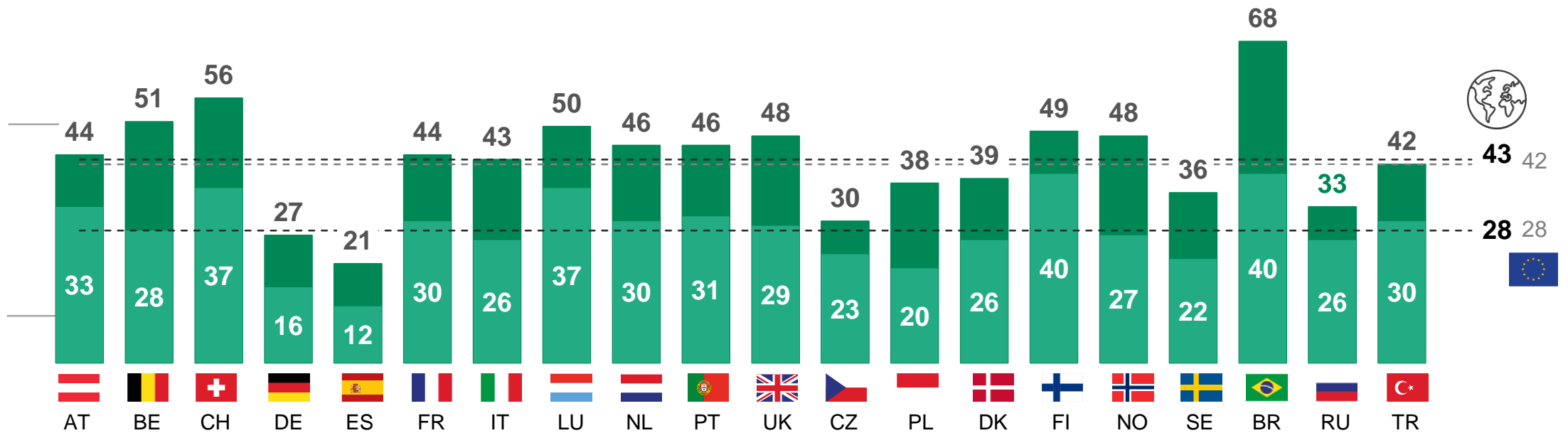
In %



ALREADY USED OR CONSIDERED NEXT 3 YEARS



ALREADY USING



What have you already implemented and what 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 BETWEEN EMPLOYEES IMPLEMENTATION

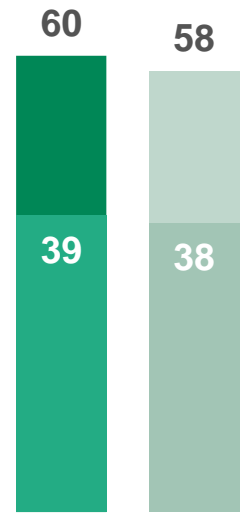
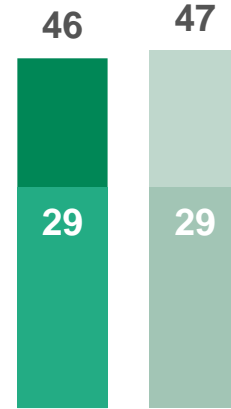
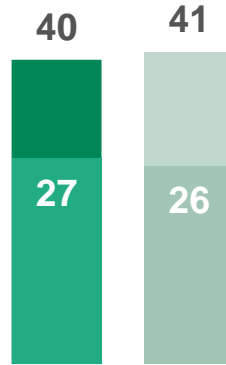
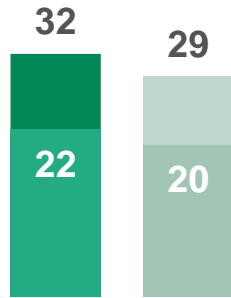
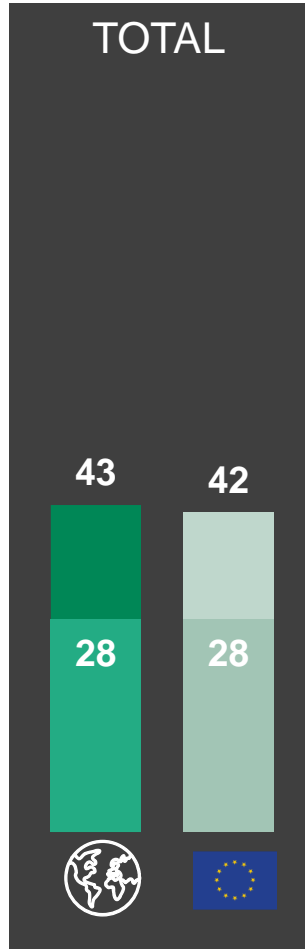
In %



ALREADY IMPLEMENTED OR USING NEXT 3 YEARS



ALREADY USING



What have you already implemented and what 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 SHARING IMPLEMENTATION

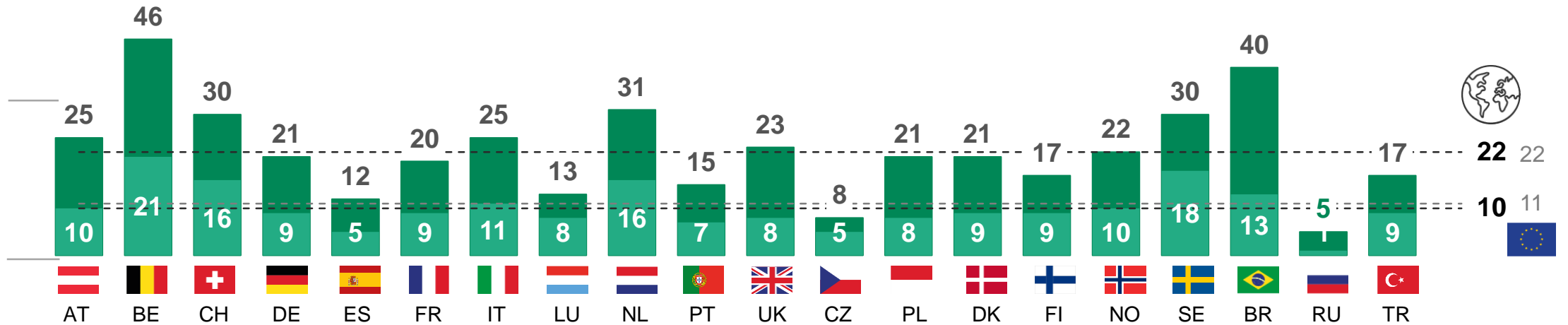
In %



ALREADY USED OR CONSIDERED NEXT 3 YEARS



ALREADY USING



What have you already implemented and what 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 SHARING IMPLEMENTATION

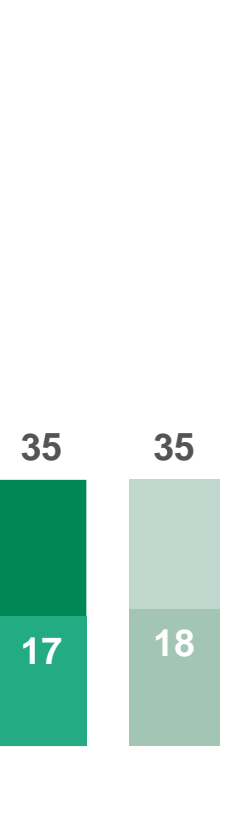
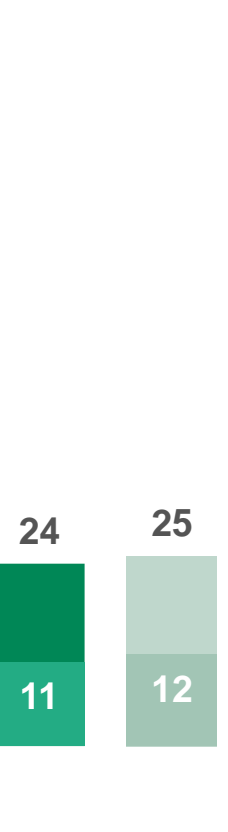
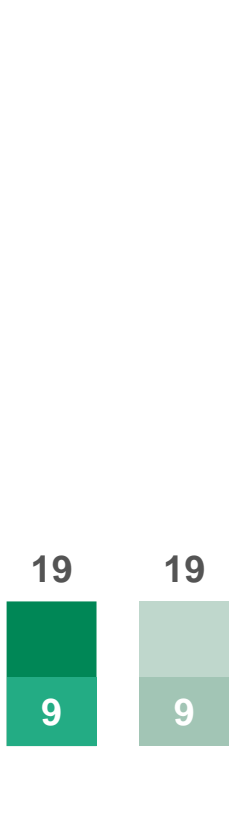
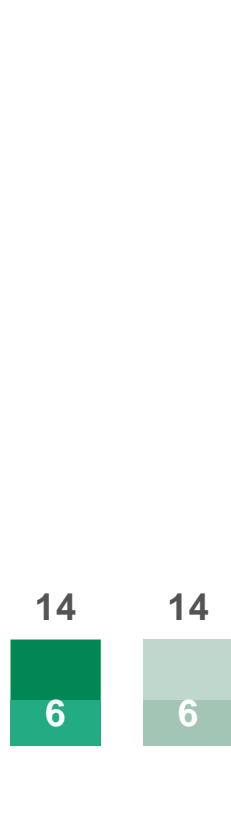
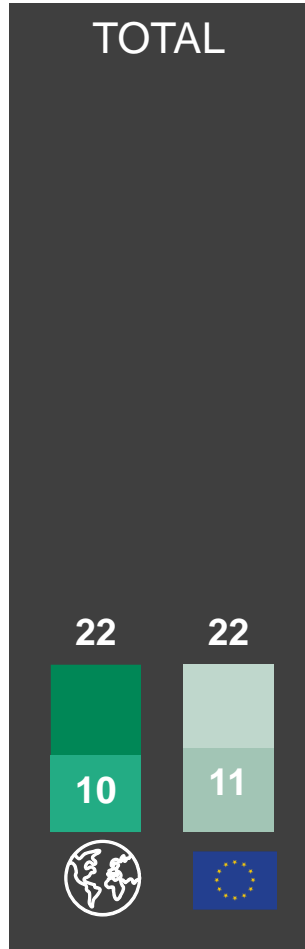
In %



ALREADY IMPLEMENTED OR USING NEXT 3 YEARS



ALREADY USING



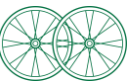
What have you already implemented and what will you implement in the next 3 years?  
 Response scale: Already using, considered in the next 3 years, not interested  
 Basis: companies with corporate vehicles = 100%

# OTHER 2 WHEELS SOLUTIONS OR MICRO-MOBILITY IMPLEMENTATION

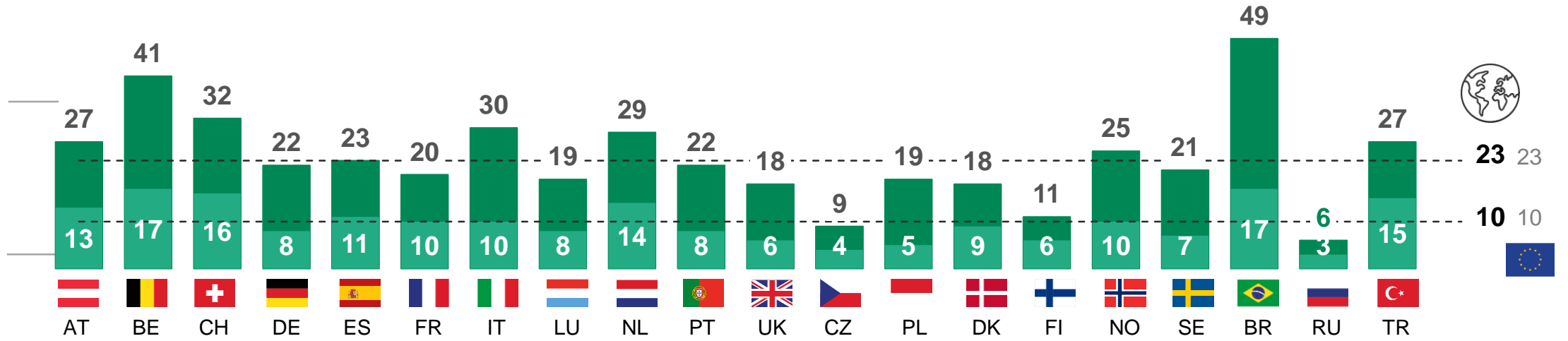
In %



ALREADY USED OR CONSIDERED NEXT 3 YEARS



ALREADY USING



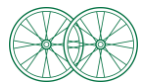
What have you already implemented and what will you implement in the next 3 years?  
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# OTHER 2 WHEELS SOLUTIONS OR MICRO-MOBILITY IMPLEMENTATION

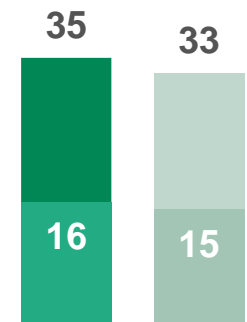
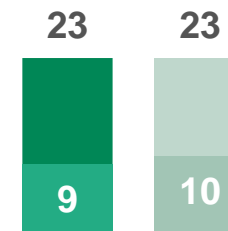
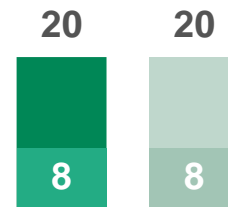
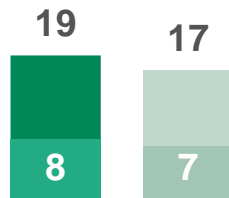
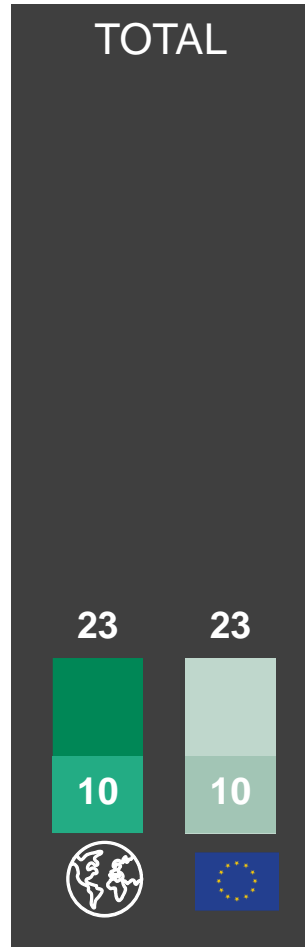
In %



ALREADY IMPLEMENTED OR USING NEXT 3 YEARS



ALREADY USING



What have you already implemented and what 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

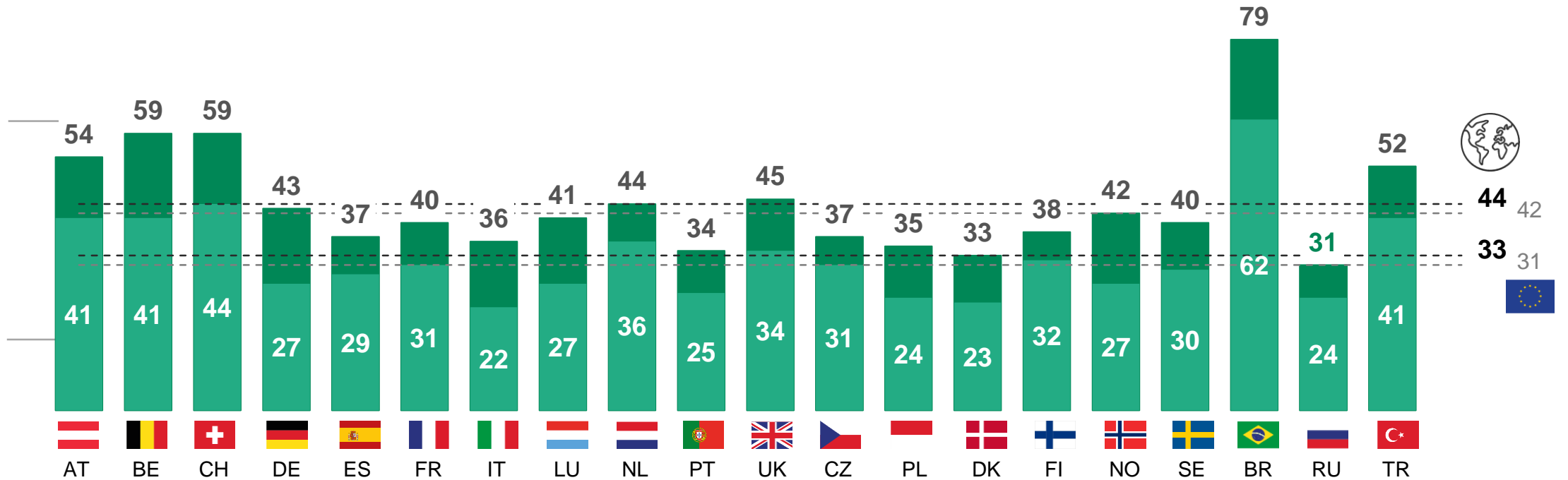
In %



ALREADY USED OR CONSIDERED NEXT 3 YEARS



ALREADY USING



What have you already implemented and what 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

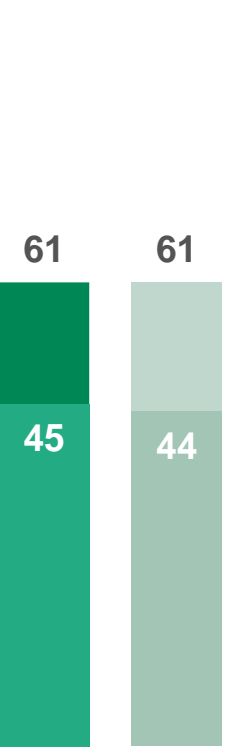
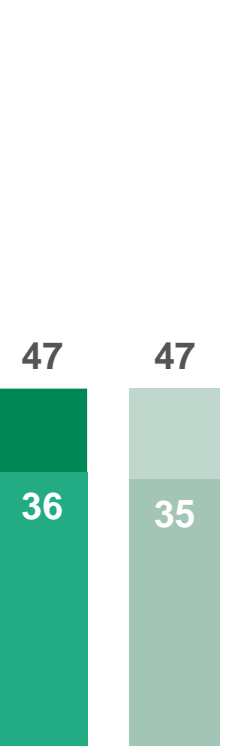
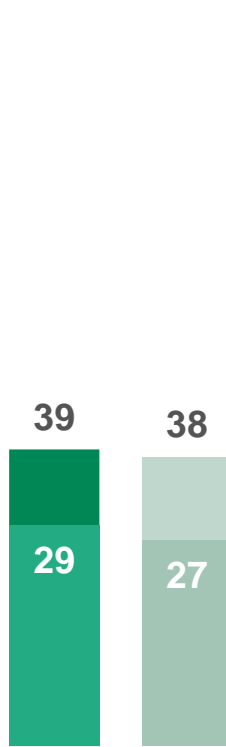
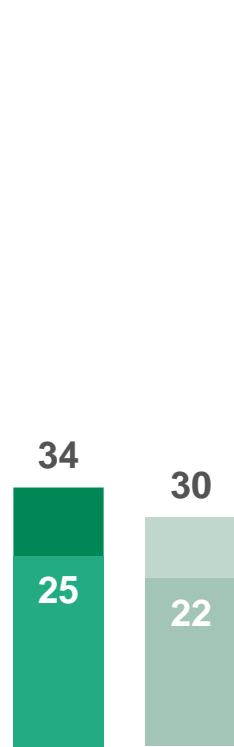
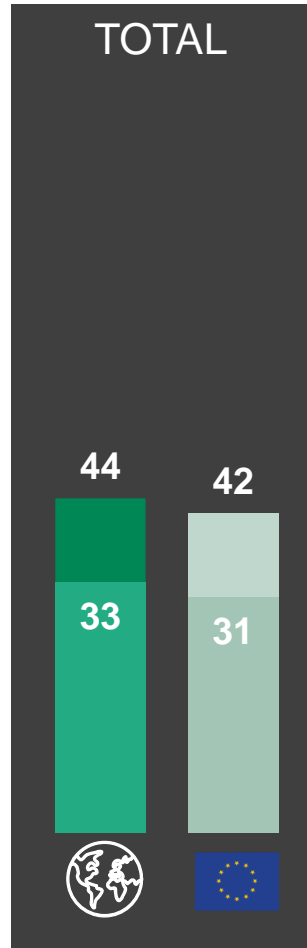
In %



ALREADY IMPLEMENTED OR USING NEXT 3 YEARS



ALREADY USING



What have you already implemented and what 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

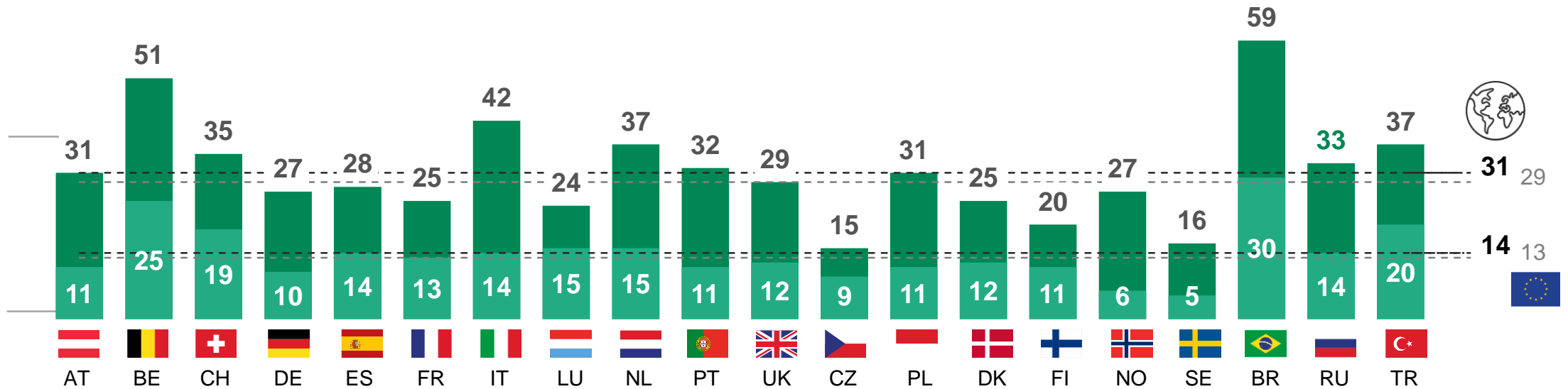
In %



ALREADY USED OR CONSIDERED NEXT 3 YEARS



ALREADY USING



What have you already implemented and what 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

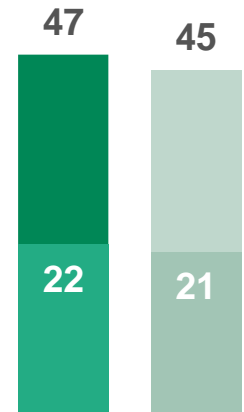
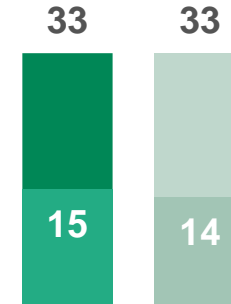
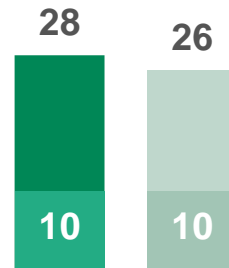
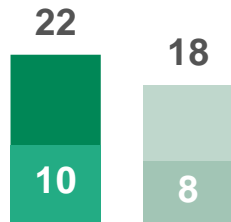
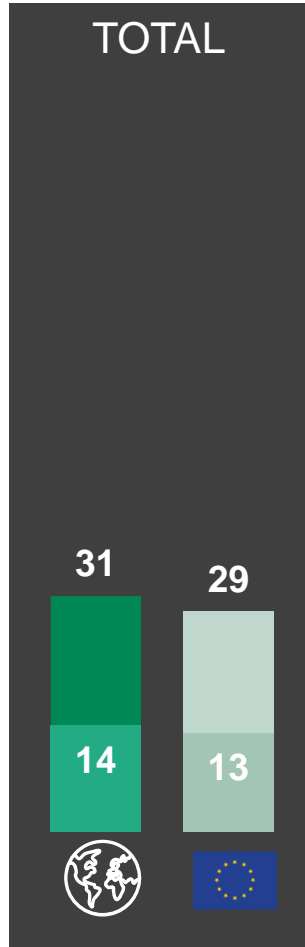
In %



ALREADY IMPLEMENTED OR USING NEXT 3 YEARS



ALREADY USING



What have you already implemented and what 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 CARD PROVIDED BY THE EMPLOYER IMPLEMENTATION

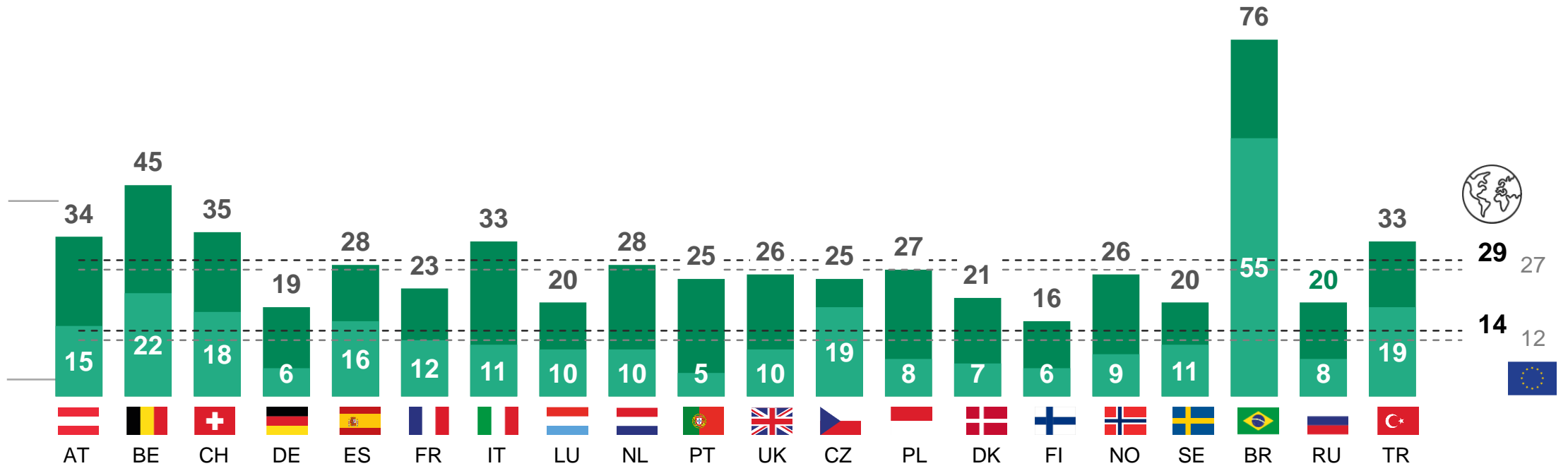
In %



ALREADY  
USED OR  
CONSIDERED  
NEXT 3 YEARS



ALREADY  
USING



What have you already implemented and what 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 CARD PROVIDED BY THE EMPLOYER IMPLEMENTATION

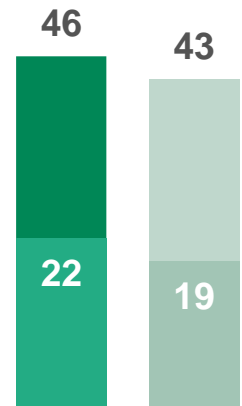
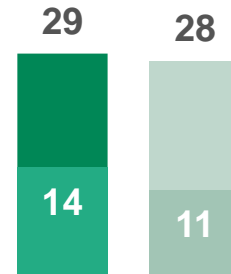
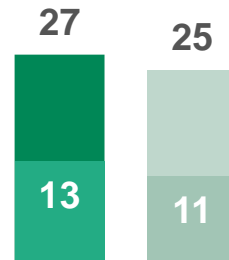
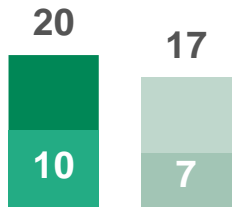
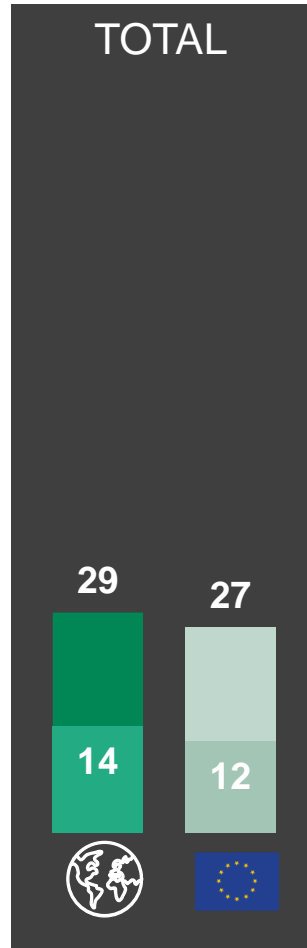
In %



ALREADY IMPLEMENTED OR USING NEXT 3 YEARS



ALREADY USING



What have you already implemented and what 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

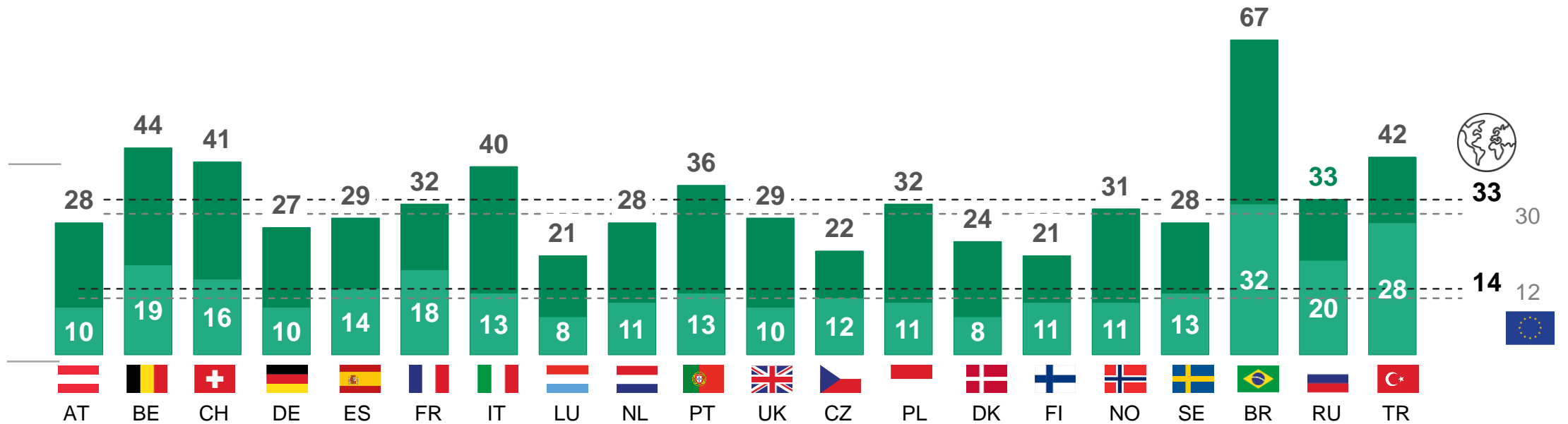
In %



ALREADY USED OR CONSIDERED NEXT 3 YEARS



ALREADY USING



What have you already implemented and what 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

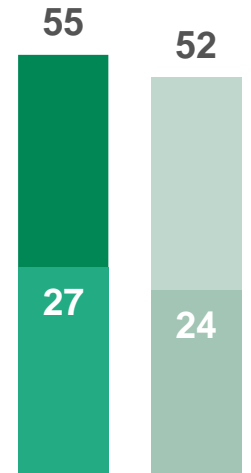
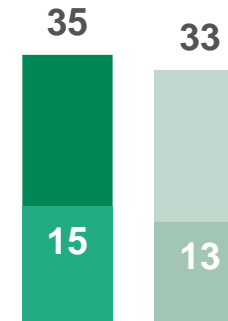
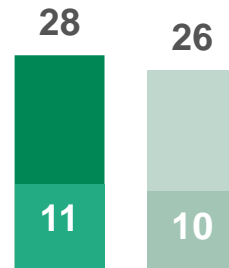
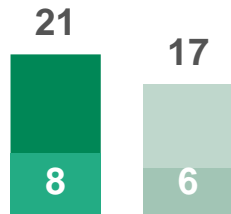
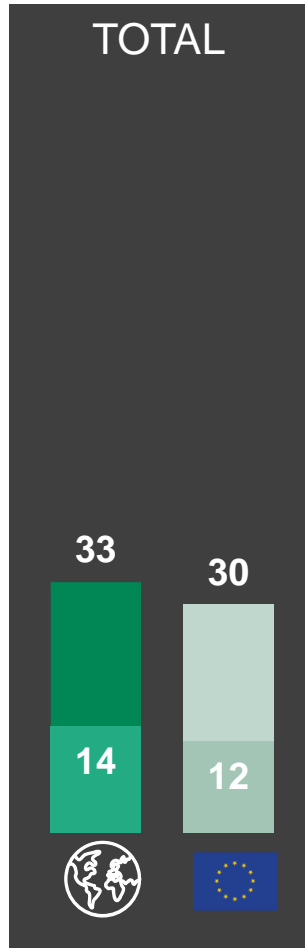
In %



ALREADY IMPLEMENTED OR USING NEXT 3 YEARS



ALREADY USING



What have you already implemented and what 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

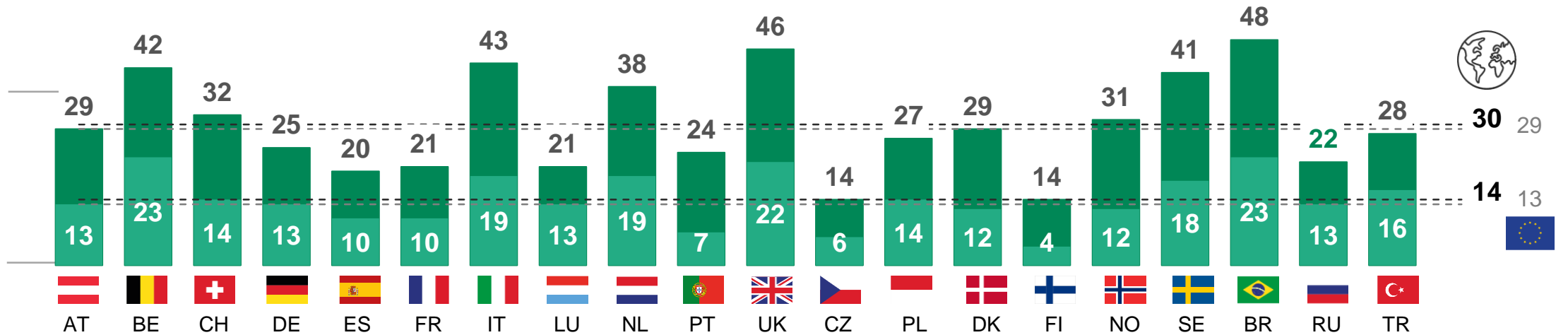
In %



ALREADY USED OR CONSIDERED NEXT 3 YEARS



ALREADY USING



What have you already implemented and what 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

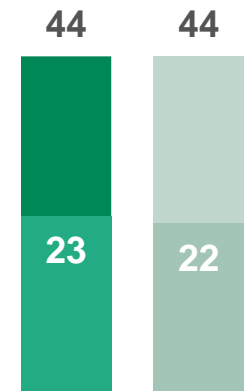
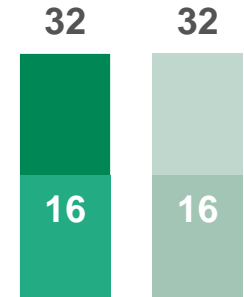
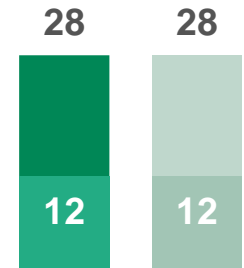
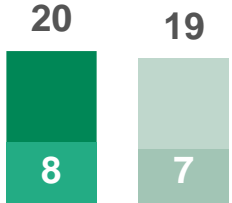
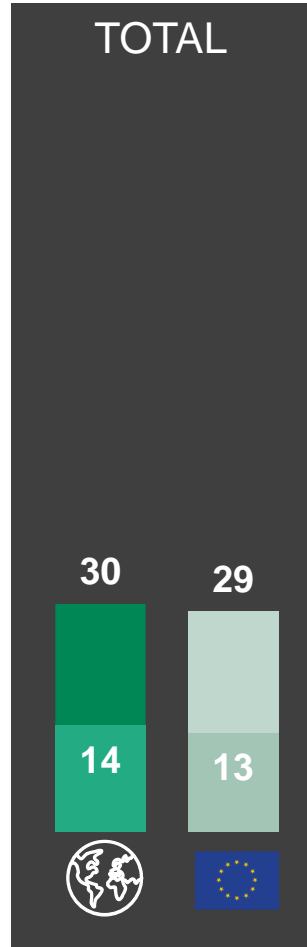
In %



ALREADY IMPLEMENTED OR USING NEXT 3 YEARS



ALREADY USING



What have you already implemented and what 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%

# MID-TERM RENTAL VEHICLES IMPLEMENTATION

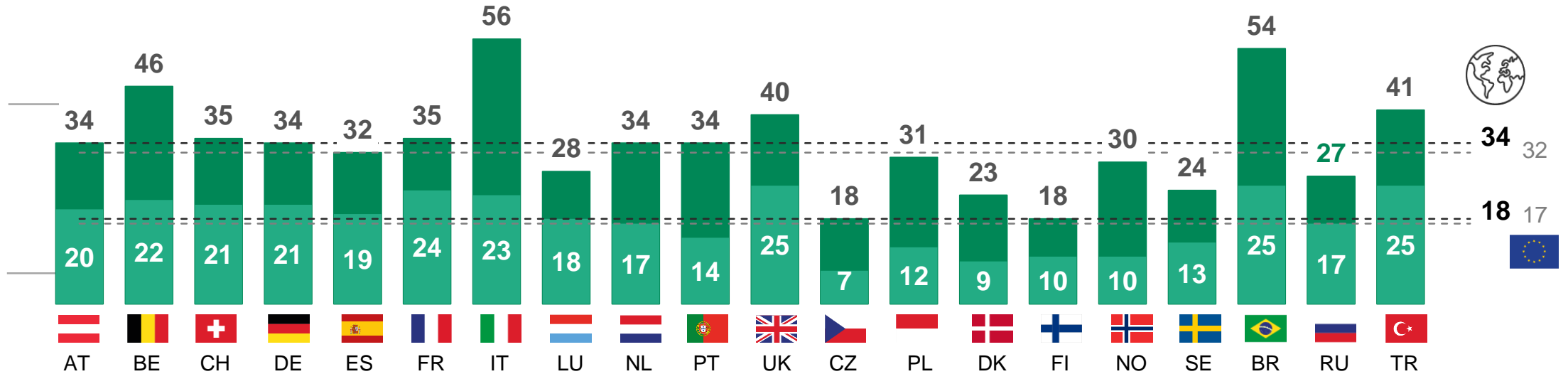
In %



ALREADY USED OR CONSIDERED NEXT 3 YEARS



ALREADY USING



What have you already implemented and what 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%

# MID-TERM RENTAL VEHICLES IMPLEMENTATION

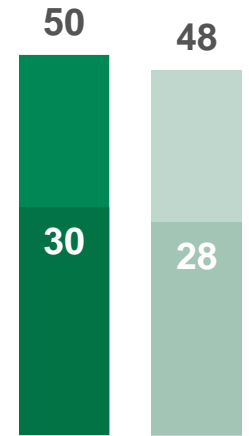
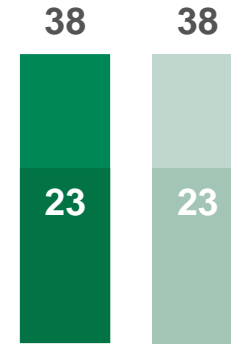
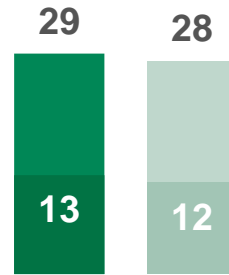
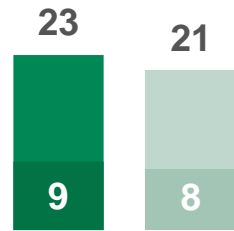
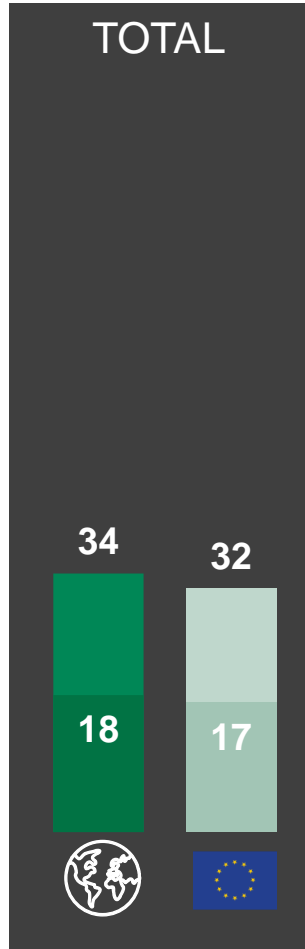
In %



ALREADY IMPLEMENTED OR USING NEXT 3 YEARS



ALREADY USING



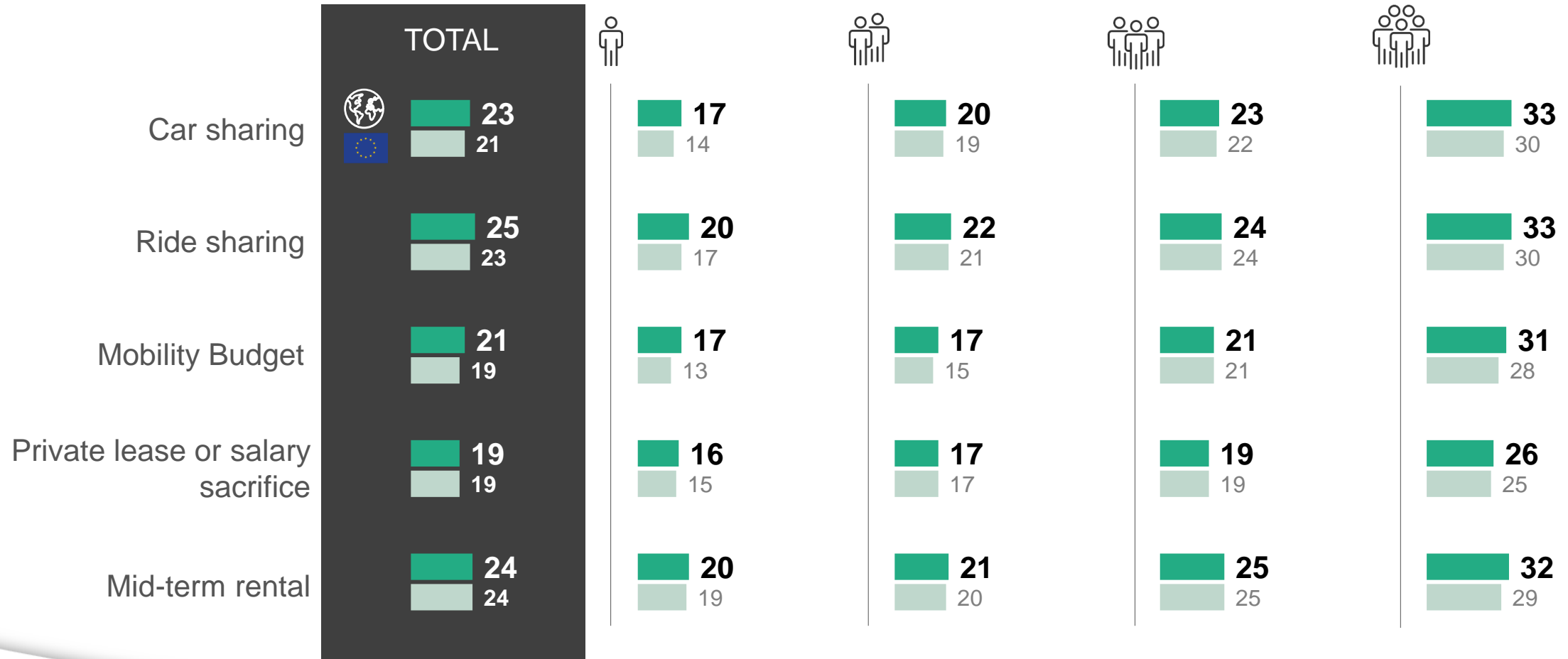
What have you already implemented and what will you implement in the next 3 years?  
 Response scale: Already using, considered in the next 3 years, not interested  
 Basis: companies with corporate vehicles = 100%



# LIKELYHOOD TO GIVE UP PART / ALL FLEET FOR MOBILITY ALTERNATIVES

TOTAL Certainly or probably

In %

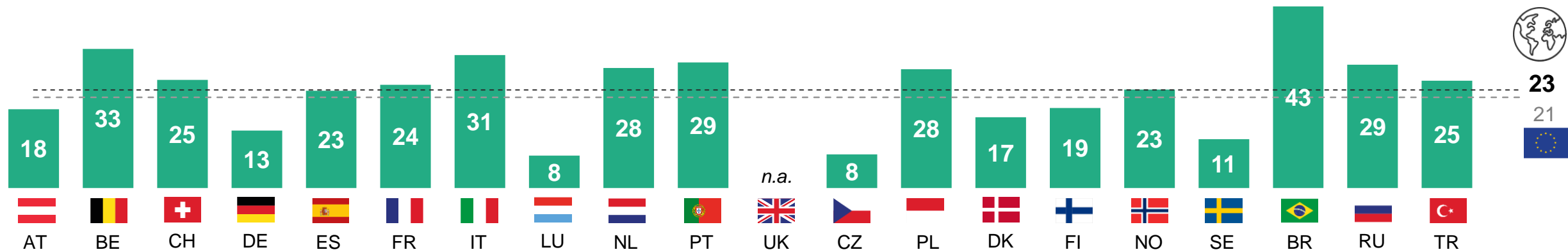


Would you anticipate that your company would give up all or part of the company car fleet for such alternatives?  
 . Basis: companies using or considering the mentioned mobility solution

# LIKELYHOOD TO GIVE UP PART / ALL FLEET FOR CAR SHARING

TOTAL Certainly or probably

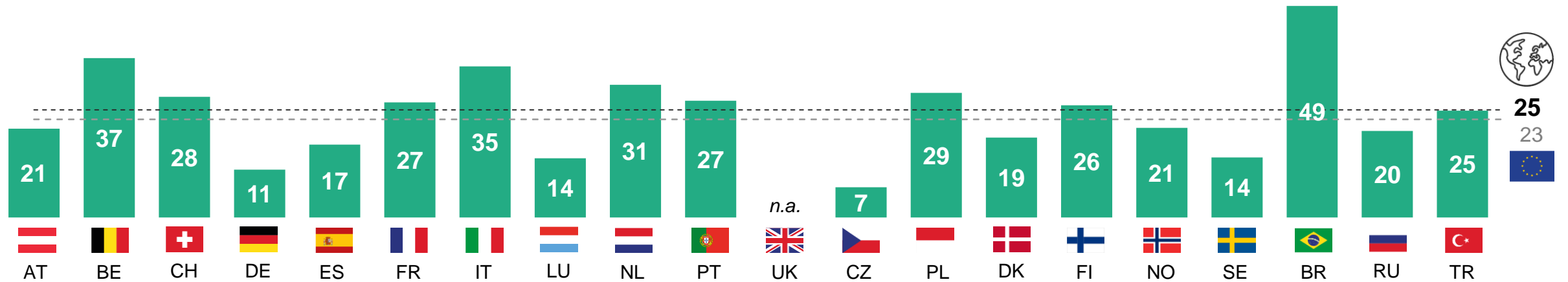
In %



# LIKELYHOOD TO GIVE UP PART / ALL FLEET FOR RIDE SHARING

TOTAL Certainly or probably

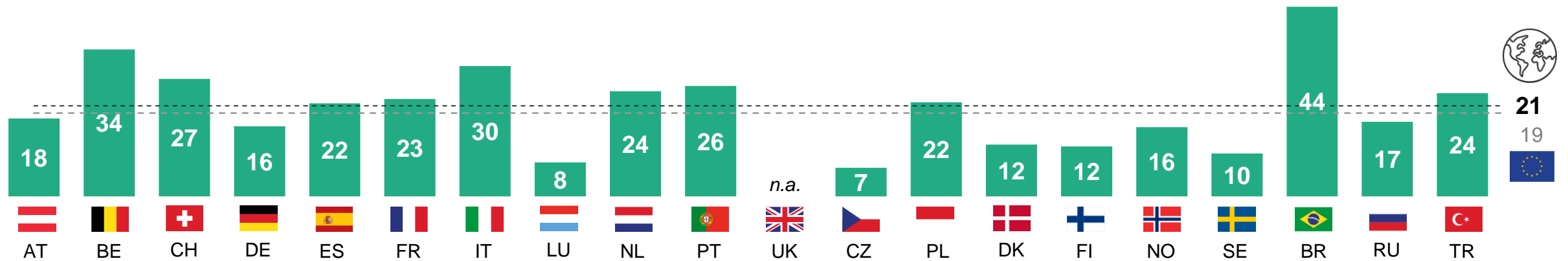
In %



# LIKELYHOOD TO GIVE UP PART / ALL FLEET FOR MOBILITY BUDGET

TOTAL Certainly or probably

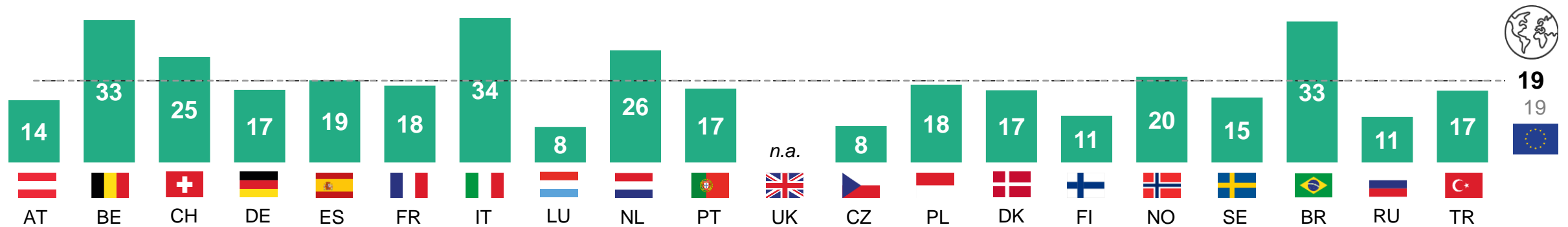
In %



# LIKELYHOOD TO GIVE UP PART / ALL FLEET FOR PRIVATE LEASE OR SALARY SACRIFICE

TOTAL Certainly or probably

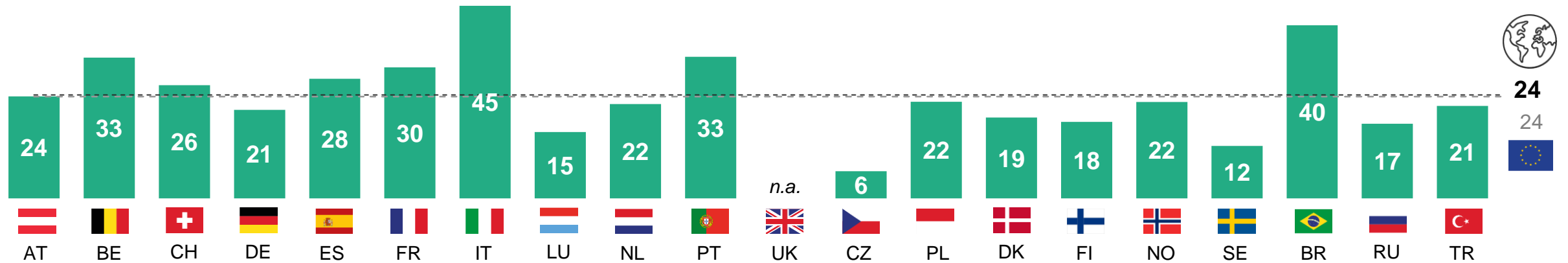
In %



# LIKELYHOOD TO GIVE UP PART / ALL FLEET FOR MID TERM RENTAL

TOTAL Certainly or probably

In %






6

# HOW COMPANIES ARE FINANCING THEIR FLEET?





# MAIN FINANCING METHOD

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

In %

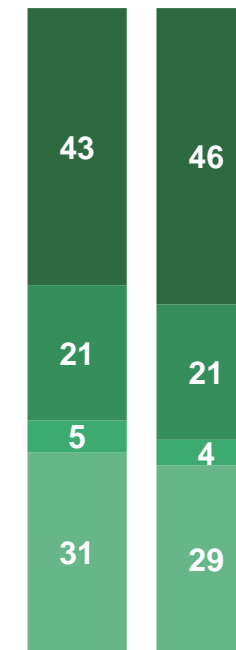
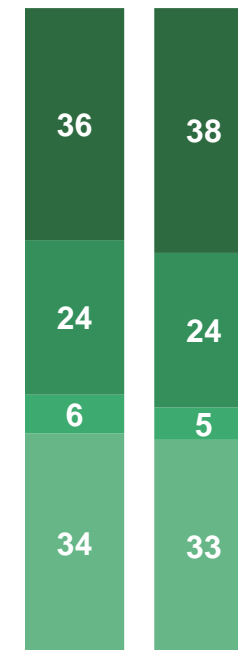
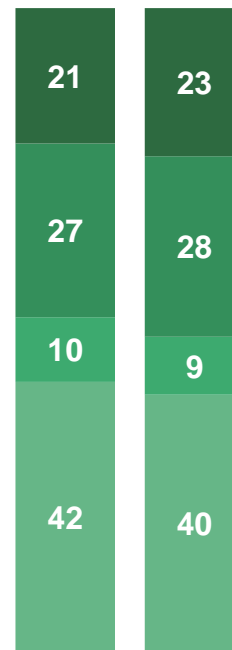
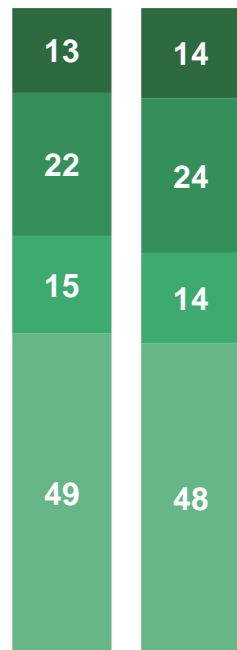
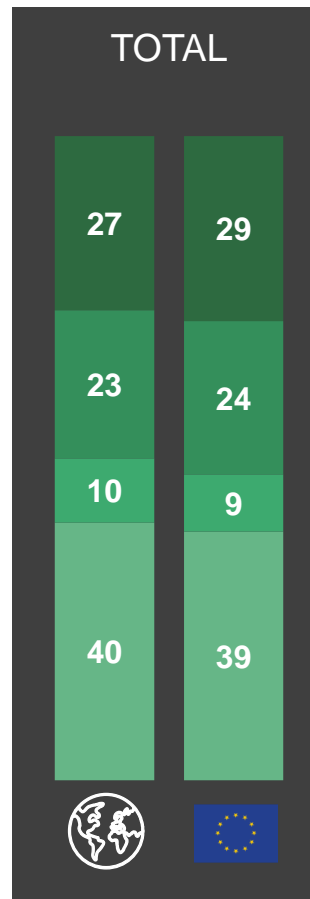


Passenger cars + LCVs

- Self purchase\* 
- Car credit 
- Finance leasing 
- Operating leasing 

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

Data have been consolidated: 3 years average



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



# MAIN FINANCING METHOD – SELF PURCHASE\*

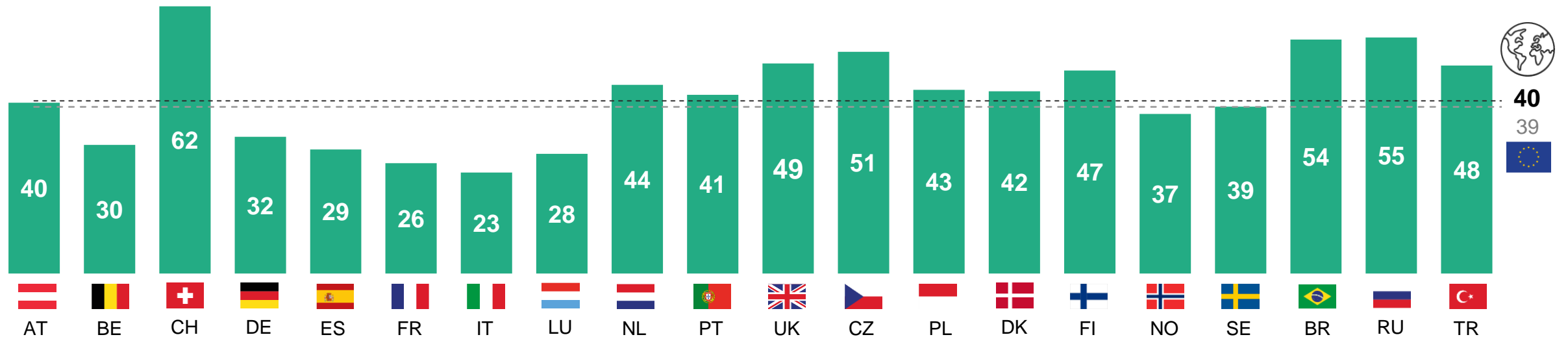
In %



Passenger cars + LCVs

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

data have been consolidated: 3 years average (except new countries: DK, FI, NO, SE, BR, RU)



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

# MAIN FINANCING METHOD – FOCUS OPERATING LEASING

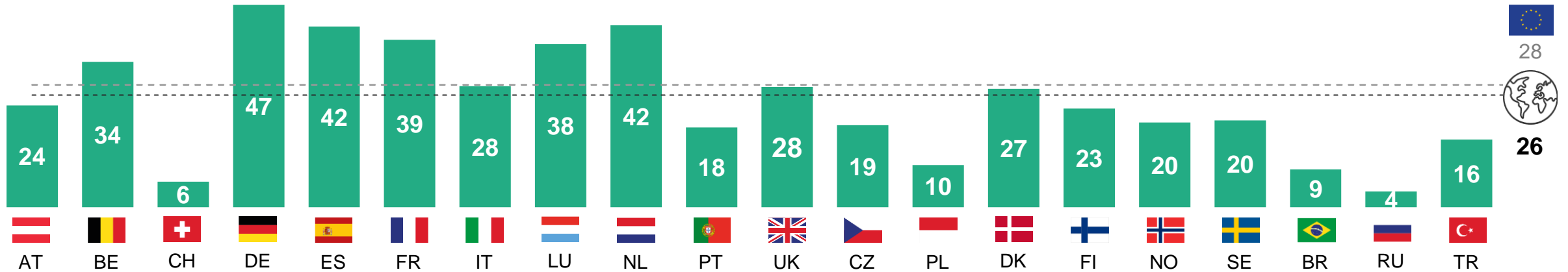
In %



Passenger cars + LCVs

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

data have been consolidated: 3 years average (except new countries: DK, FI, NO, SE, BR, RU)



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

# MAIN FINANCING METHOD – FOCUS OPERATING LEASING

Focus on 1 to 9



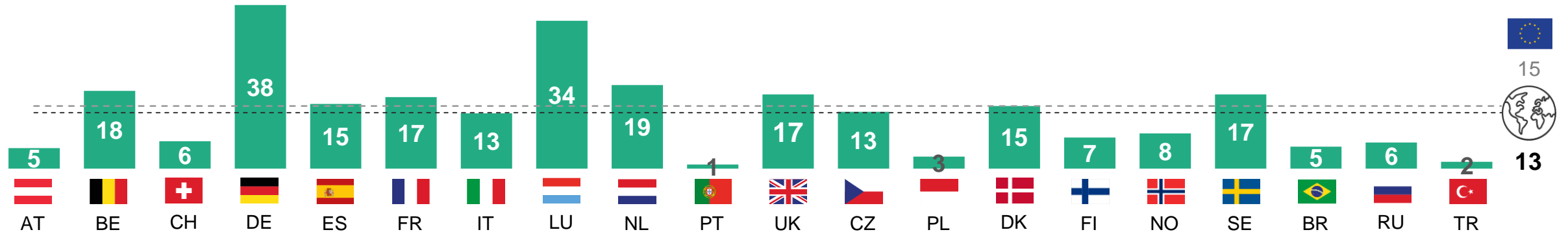
In %



Passenger cars + LCVs

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

data have been consolidated: 3 years average (except new countries: DK, FI, NO, SE, BR, RU)



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

# MAIN FINANCING METHOD – FOCUS OPERATING LEASING

Focus on 10 to 99



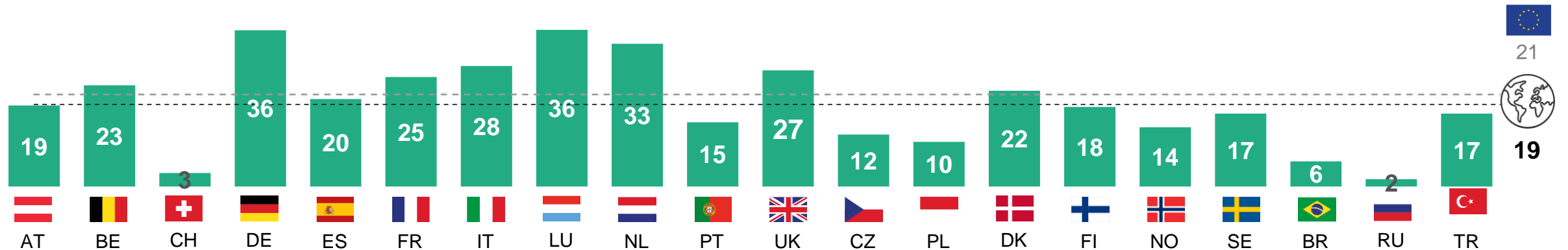
In %



Passenger cars + LCVs

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

data have been consolidated: 3 years average (except new countries: DK, FI, NO, SE, BR, RU)



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

# MAIN FINANCING METHOD – FOCUS OPERATING LEASING

Focus on 100 to 249/499/999



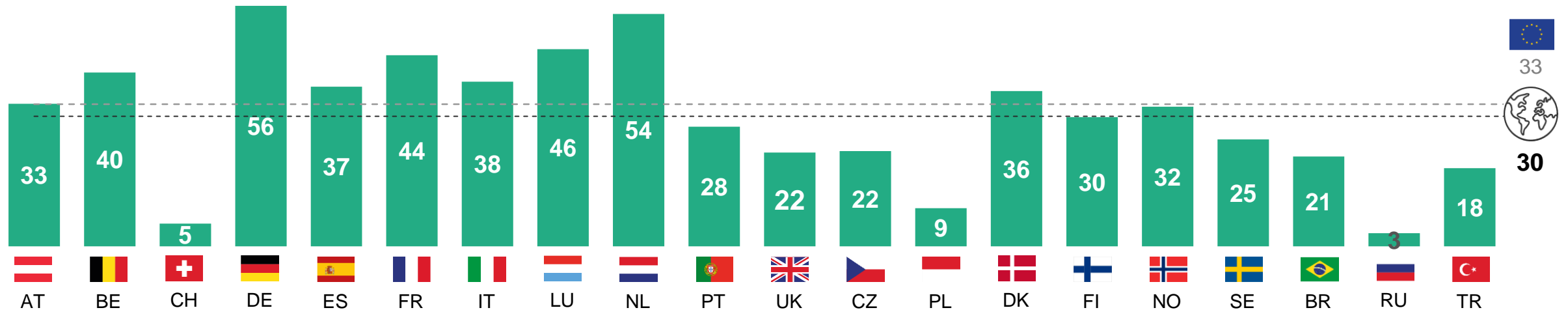
In %



Passenger cars + LCVs

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

data have been consolidated: 3 years average (except new countries: DK, FI, NO, SE, BR, RU)



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

# MAIN FINANCING METHOD – FOCUS OPERATING LEASING

Focus on 250/500/1000 and more



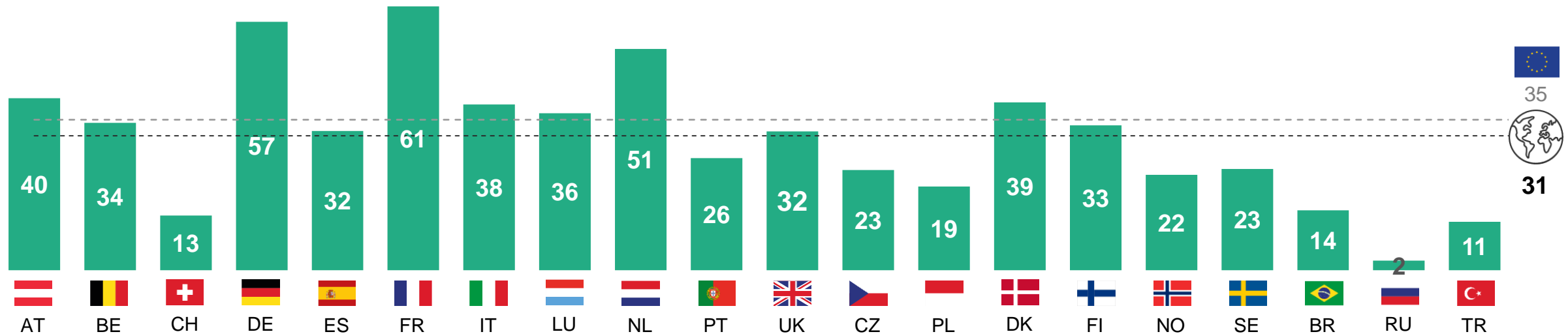
In %



Passenger cars + LCVs

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

data have been consolidated: 3 years average (except new countries: DK, FI, NO, SE, BR, RU)



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

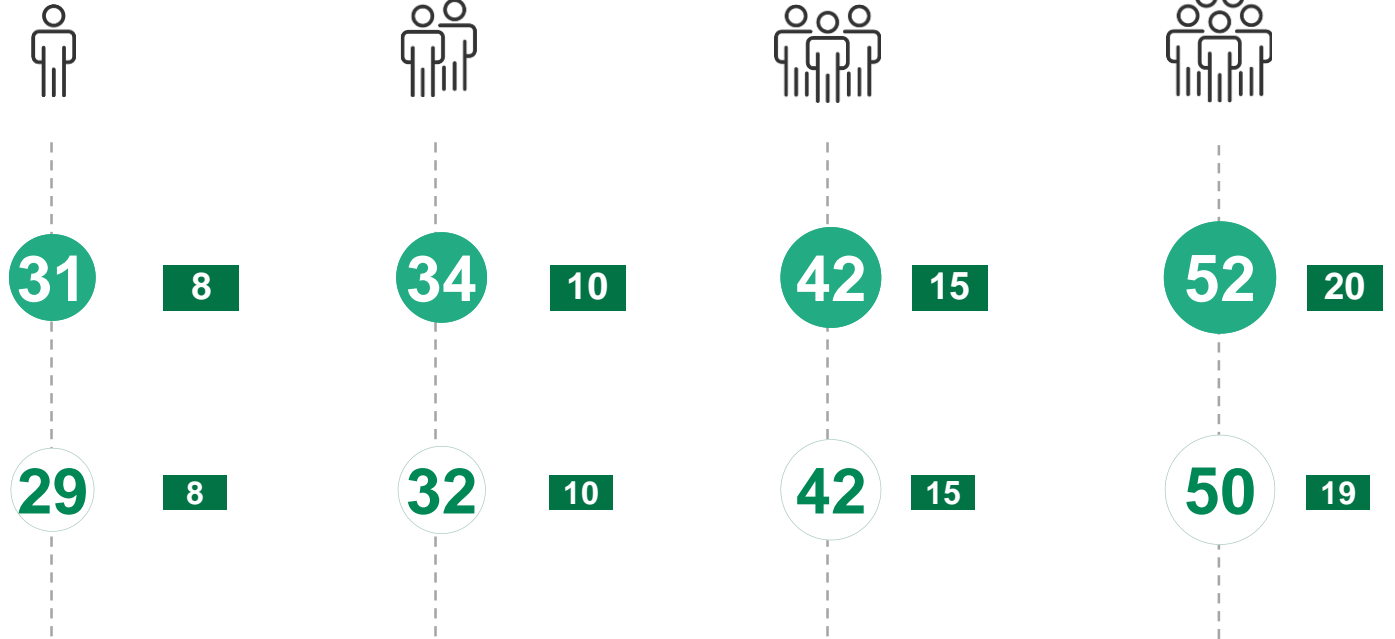
# INTENTION TO DEVELOP OPERATING LEASING

Proportion of companies having the intention to develop operational 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%*

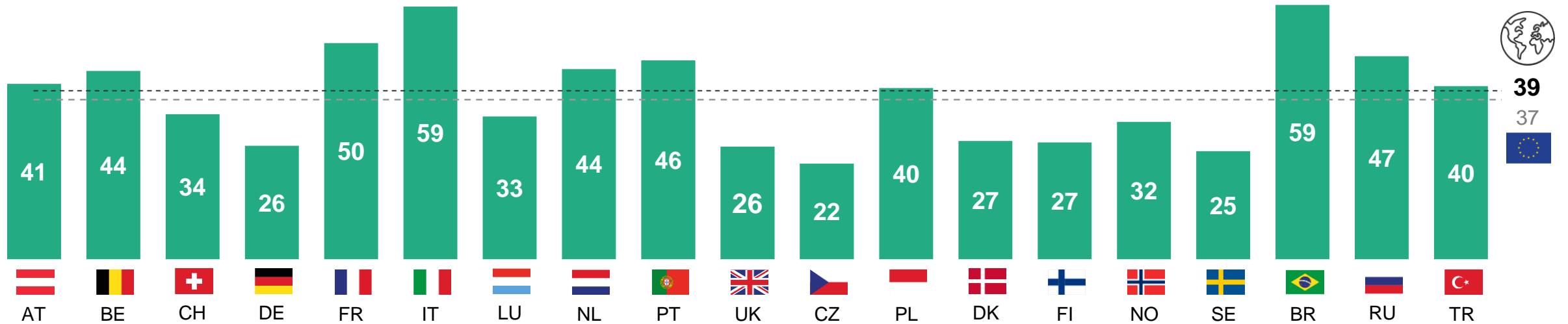
# INTENTION TO DEVELOP OPERATING LEASING

Proportion of companies having the intention to develop operational 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  
TELEMATICS, DIGITAL TOOLS AND  
ROAD SAFETY EQUIPMENTS?

# PROPORTION OF COMPANIES USING TELEMATICS

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

## HOW TO READ THE RESULTS ?

37% of companies with fleet use telematics for all or part of their fleet.

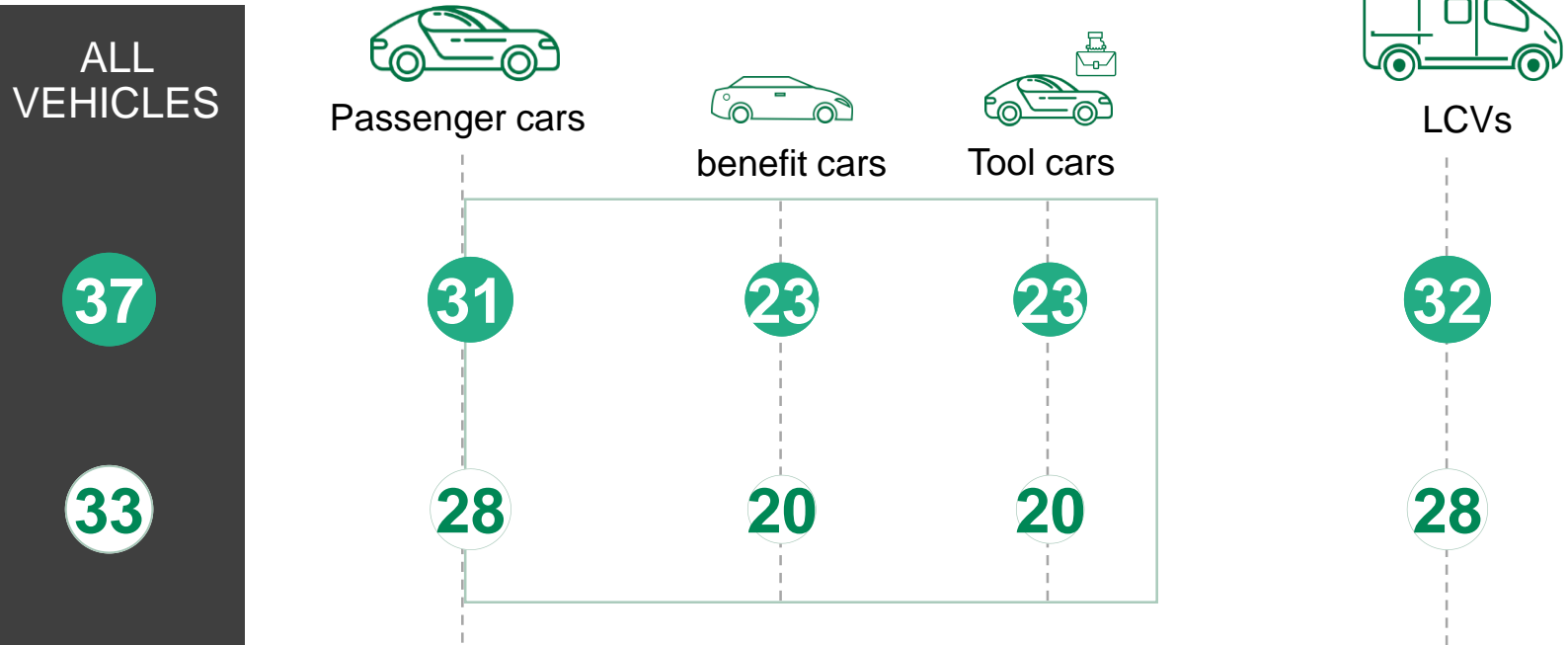
Among companies owning passenger cars, 31% use telematics for passenger cars, 23% use telematics for benefit cars, 23% for tool cars.

Among companies owning LCVs, 32% use telematics for LCVs.

In %



Passenger cars + LCVs



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

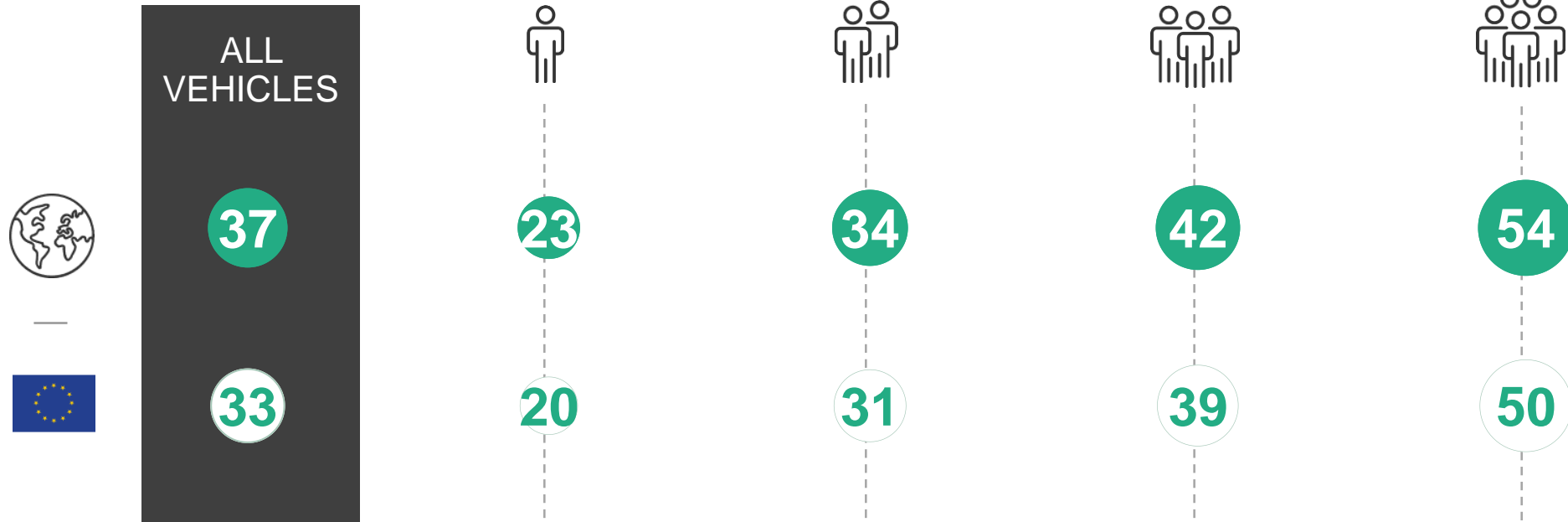
# PROPORTION OF COMPANIES USING TELEMATICS

In %



Passenger cars + LCVs

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

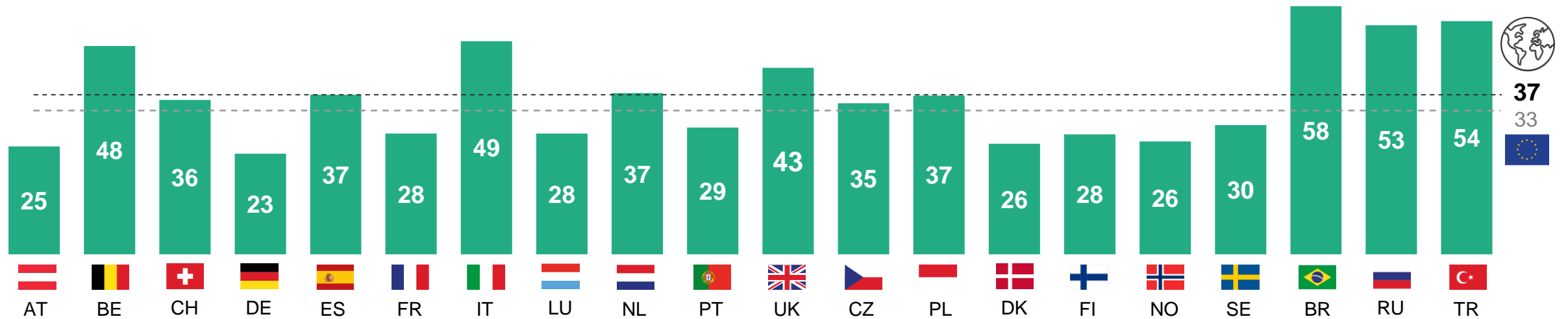


*Is your fleet connected thanks to Telematics tool? Telematics enables transmission of data to monitor fuel consumption, driver behaviour, vehicle location, driver's impact on environment... from vehicles on the move. Data is transmitted by means of an original or after sales equipment or box installed in the vehicle. Telematics do not include data transmission by the mean of the users' smartphones. Basis: companies with corporate vehicles = 100%*

# PROPORTION OF COMPANIES USING TELEMATICS

In %   
 Passenger cars + LCVs

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



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

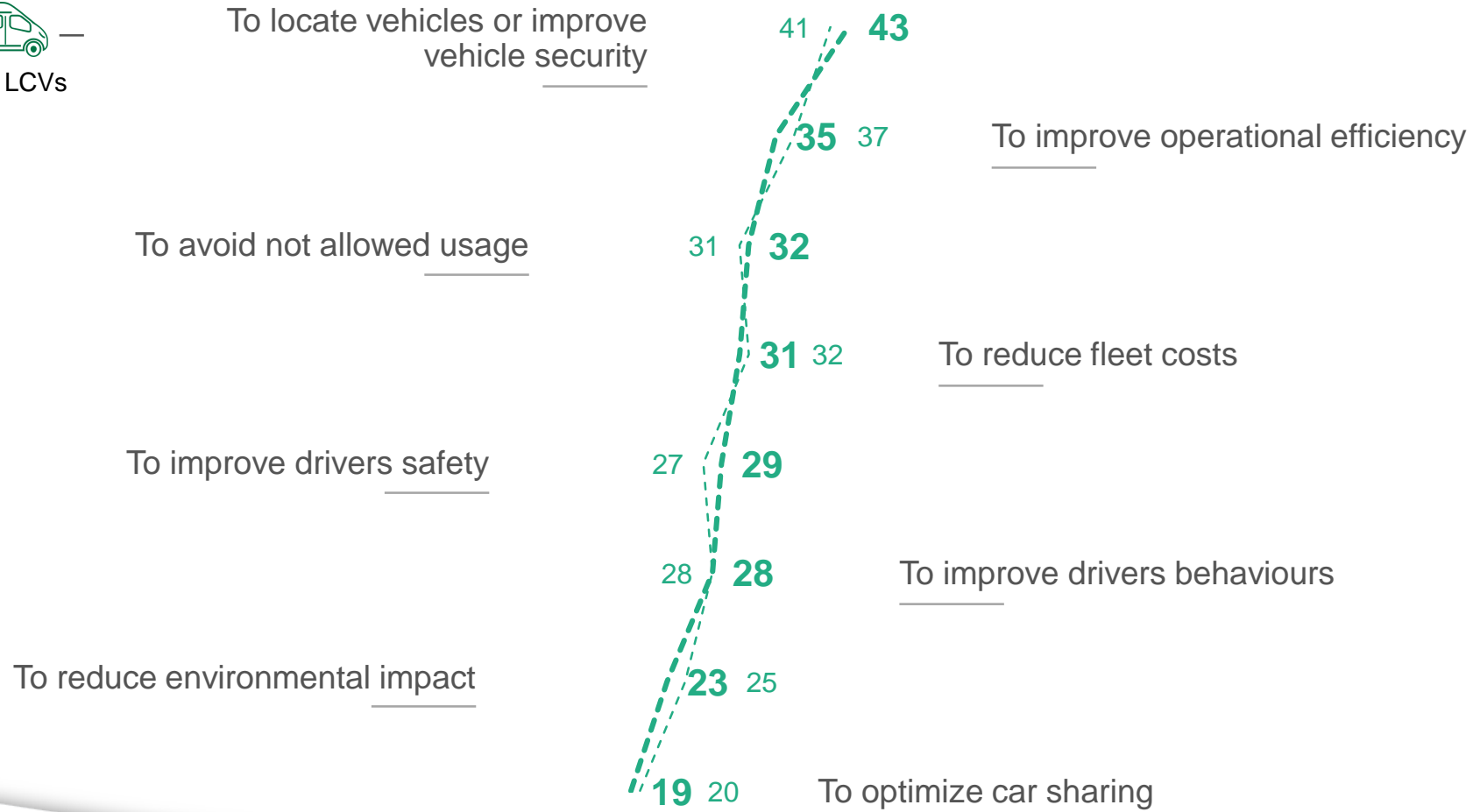
# REASONS FOR USING TELEMATICS

All vehicles

In %



Passenger cars + LCVs



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



# 8

## TELEMATICS, DIGITAL TOOLS AND ROAD SAFETY

### A. PASSENGER CARS

# PROPORTION OF COMPANIES USING TELEMATICS

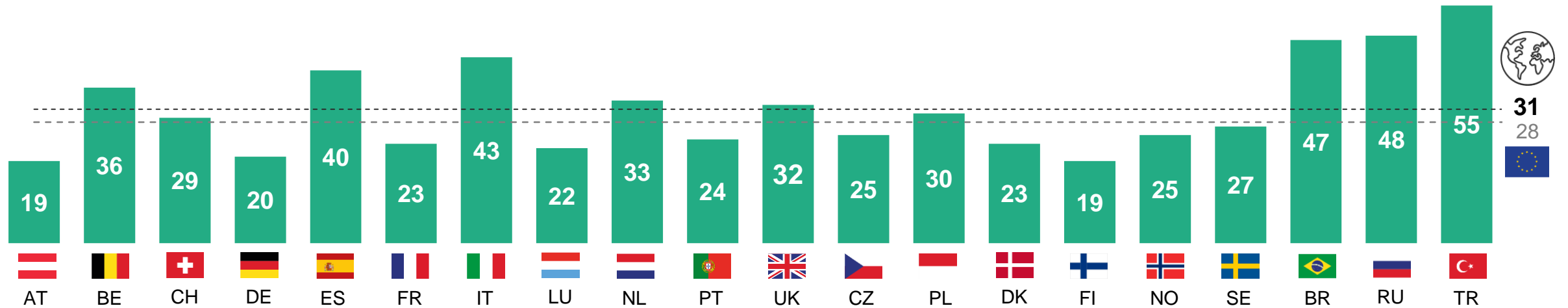
## Passenger cars

In %



Passenger cars

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



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

# PROPORTION OF COMPANIES USING TELEMATICS

In %



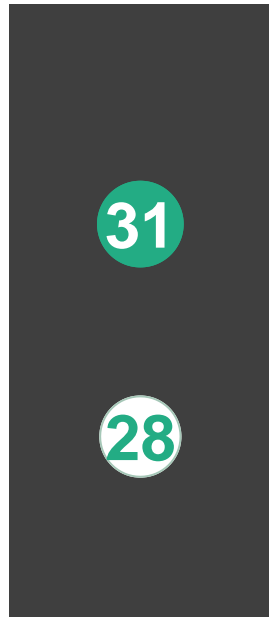
Passenger cars

## HOW TO READ THE RESULTS ?

Among companies owning passenger cars, 48% use telematics.

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

Basis: companies with at least one passenger car in fleet



22

20



28

24



34

30



44

39

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



# REASONS FOR USING TELEMATICS

## Passenger cars



In %



Passenger cars

To locate vehicles or improve vehicle security

28 32

To improve operational efficiency

23 24

To improve drivers safety

20 22

To avoid not allowed usage

20 22

To reduce fleet costs

21 22

To improve drivers behaviours

19 19

To reduce environmental impact

16 18

To optimize car sharing

12 13

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

# BARRIERS FOR USING TELEMATICS

## Passenger cars

In %



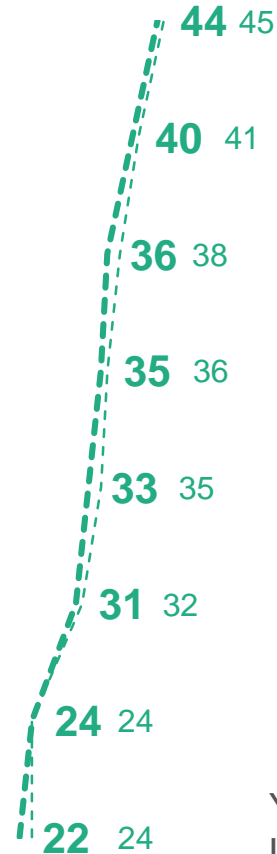
Passenger cars

You are not convinced that there will be a return on investment

Telematics is too intrusive for the drivers

You have some concerns that employees will not accept it

You are not convinced that it works



You are not convinced that the data provided will be useful for your business operation

There is not enough resource available to manage the data effectively.

You have some concerns on managing the data under GDPR

You have some concerns that Trade Unions or work councils may not accept it

*What are the barriers to Telematics usage in the future?  
Basis: companies with passenger cars which have not implemented Telematics*



# 8

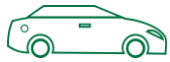
## TELEMATICS, DIGITAL TOOLS AND ROAD SAFETY

### B. BENEFIT CARS

# PROPORTION OF COMPANIES USING TELEMATICS

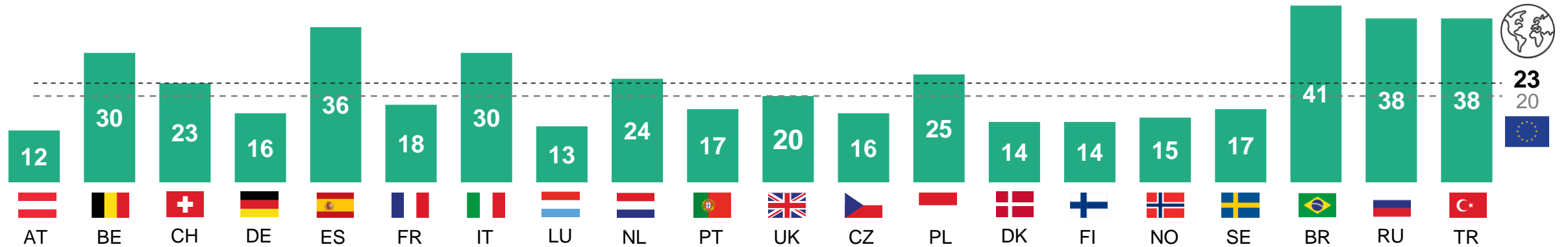
## Benefit cars

In %



Benefit cars

PROPORTION OF COMPANIES HAVING IMPLEMENTED TELEMATICS IN THEIR BENEFIT CARS



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

# PROPORTION OF COMPANIES USING TELEMATICS

In %



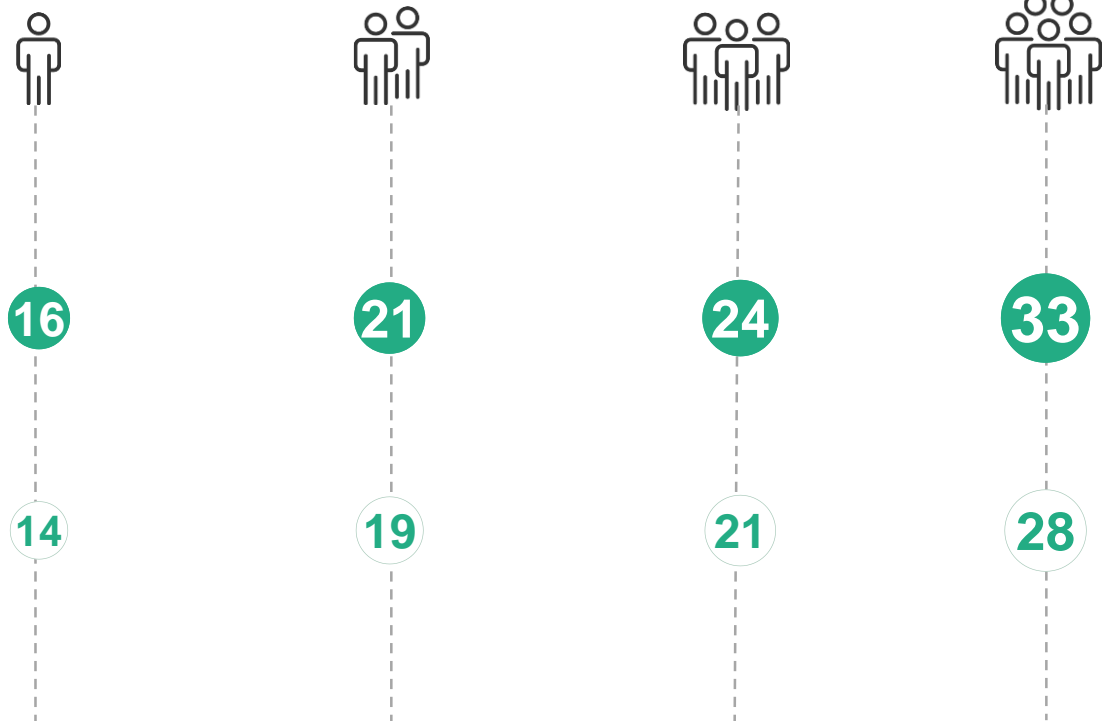
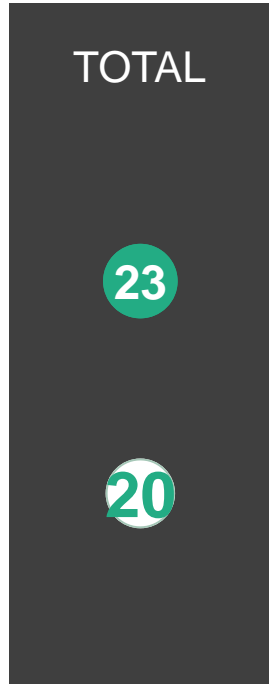
Benefit cars

## HOW TO READ THE RESULTS ?

*Among companies owning passenger cars, 38% use telematics for benefit cars.*

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

*Basis: companies with at least one passenger car in fleet*



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

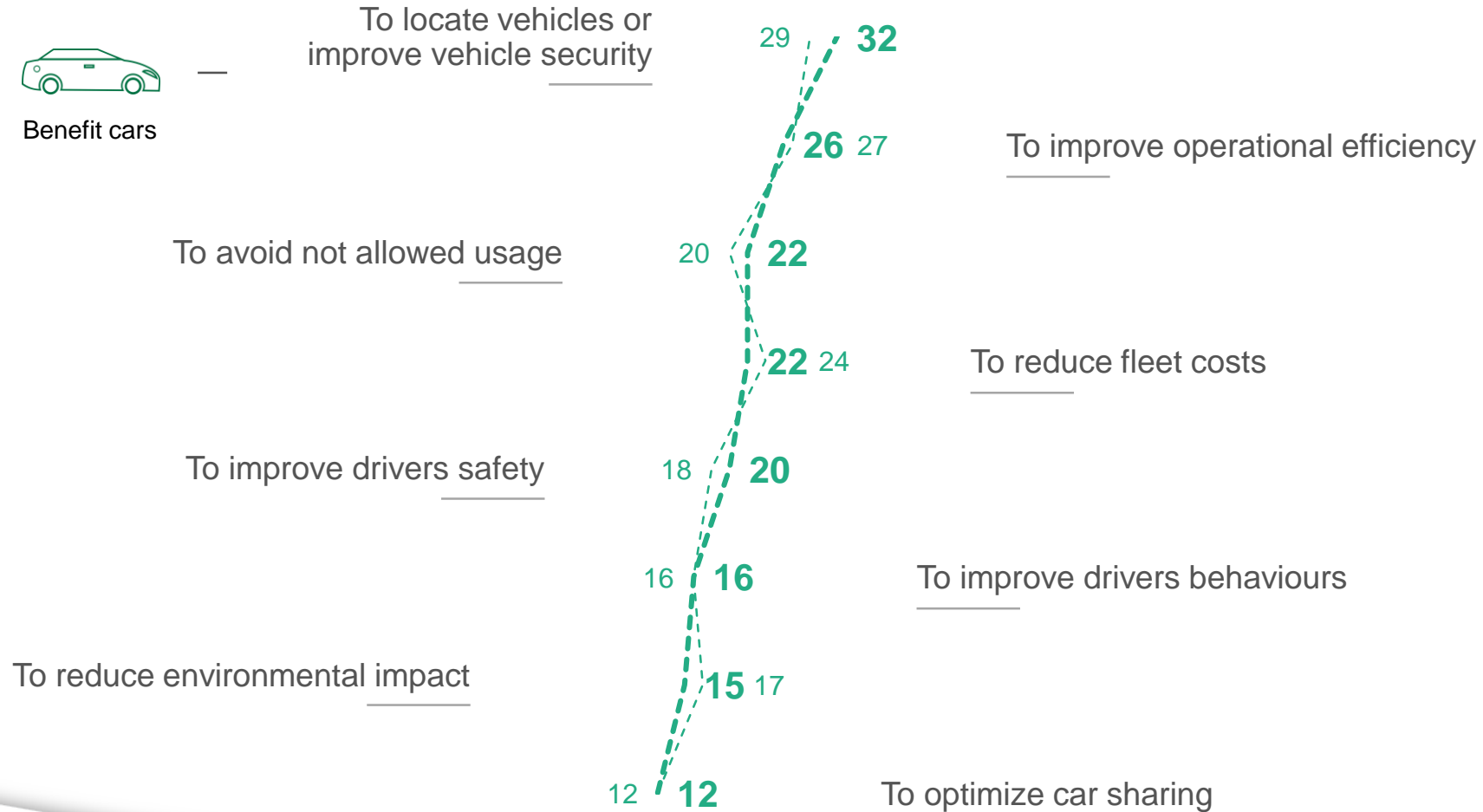
# REASONS FOR USING TELEMATICS

## Benefit cars

In %



Benefit cars

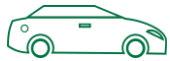


What are the two main reasons why your fleet is connected thanks to Telematics tools?  
Basis: companies with connected benefit cars thanks to Telematics

# BARRIERS TO TELEMATICS

## Benefit cars

In %



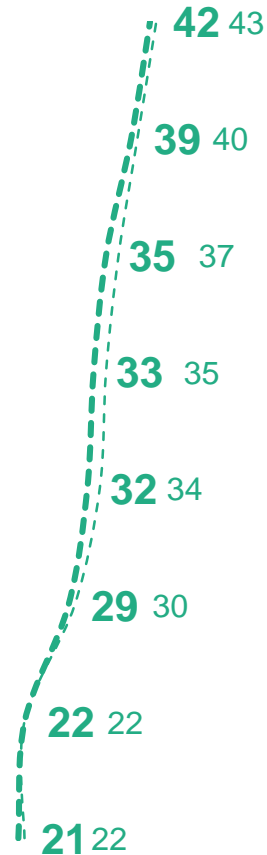
Benefit cars

You are not convinced that there will be a return on investment

Telematics is too intrusive for the drivers

You have some concerns that employees will not accept it

You are not convinced that it works



You are not convinced that the data provided will be useful for your business operation

There is not enough resource available to manage the data effectively.

You have some concerns on managing the data under GDPR

You have some concerns that Trade Unions or work councils may not accept it

What are the barriers to Telematics usage in the future?  
Basis: companies with benefit cars which have not implemented Telematics



8

# TELEMATICS, DIGITAL TOOLS AND ROAD SAFETY

C. TOOL CARS



# PROPORTION OF COMPANIES USING TELEMATICS

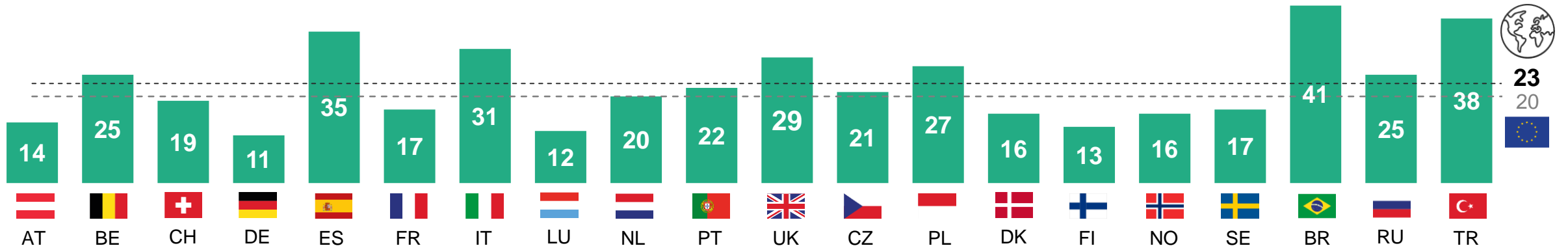
## Tool cars

In %



Tool cars

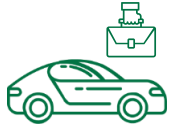
PROPORTION OF COMPANIES HAVING IMPLEMENTED  
TELEMATICS IN THEIR TOOL CARS



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

# PROPORTION OF COMPANIES USING TELEMATICS

In %



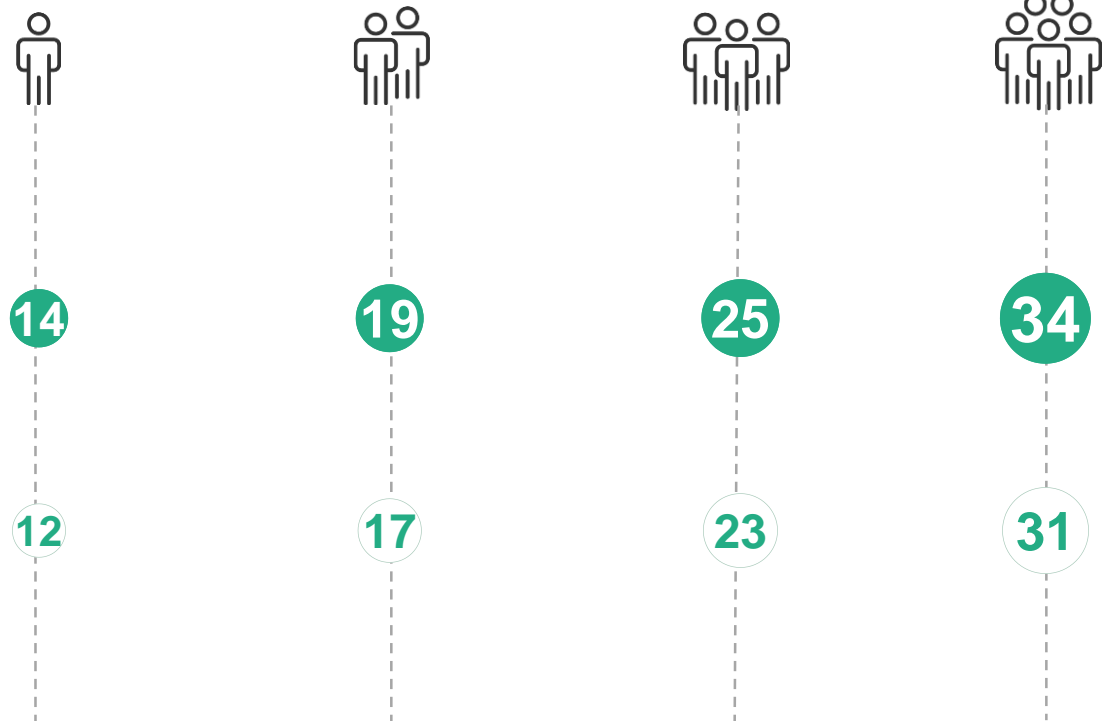
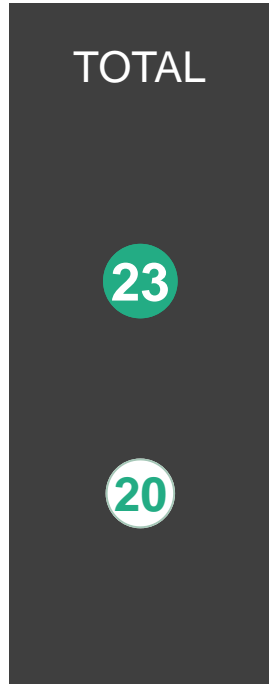
Tool cars

## HOW TO READ THE RESULTS ?

*Among companies owning passenger cars, 25% use telematics for tool cars*

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

*Basis: companies with at least one passenger car in fleet*



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

# REASONS FOR USING TELEMATICS

## Tool cars



In %



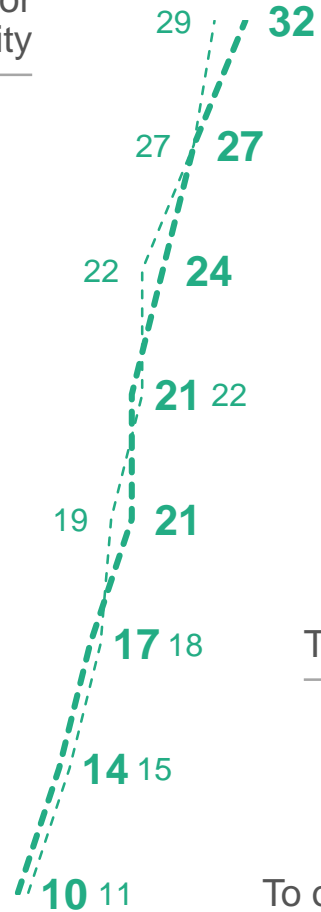
Tool cars

To locate vehicles or improve vehicle security

To avoid not allowed usage

To improve drivers safety

To reduce environmental impact



To improve operational efficiency

To reduce fleet costs

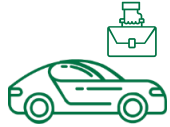
To improve drivers behaviours

To optimize car sharing

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

# BARRIERS TO TELEMATICS

## Tool cars



Tool cars

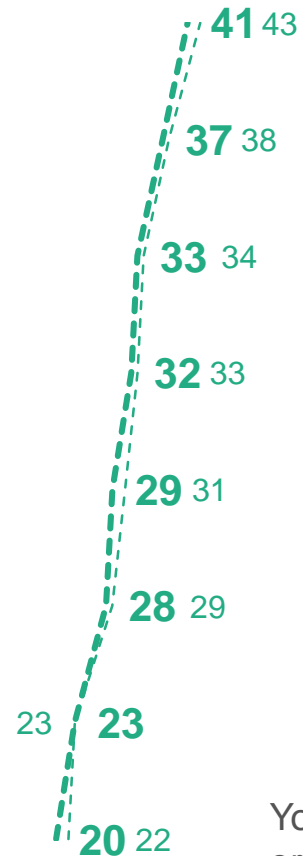
In %

You are not convinced that there will be a return on investment

There is not enough resource available to manage the data effectively.

You have some concerns that employees will not accept it

You are not convinced that it works



You are not convinced that the data provided will be useful for your business operation

Telematics is too intrusive for the drivers

You have some concerns on managing the data under GDPR

You have some concerns that Trade Unions or work councils may not accept it

What are the barriers to telematics usage in the future?  
Basis: companies with tool cars which have not implemented Telematics



8

# TELEMATICS, DIGITAL TOOLS AND ROAD SAFETY

D. LCVs

# PROPORTION OF COMPANIES USING TELEMATICS

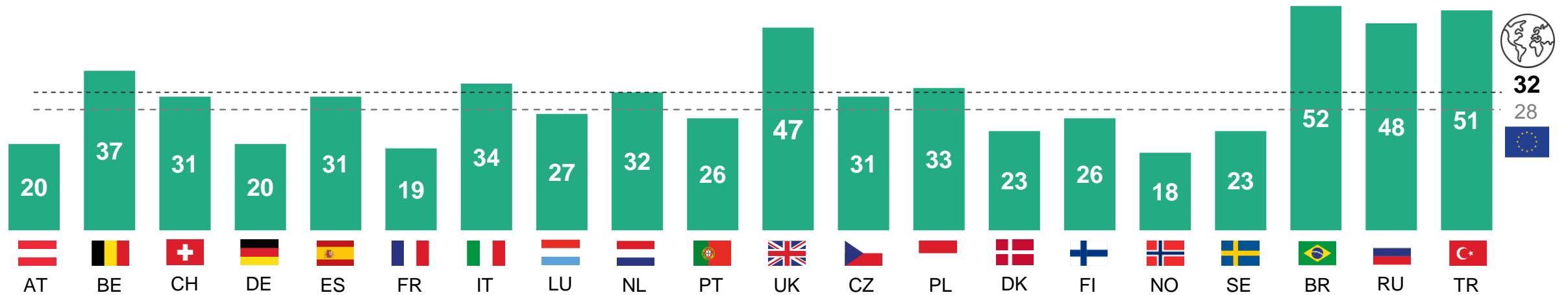
LCVs

In %



LCVs

PROPORTION OF COMPANIES HAVING IMPLEMENTED TELEMATICS IN THEIR LCVs



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

# PROPORTION OF COMPANIES USING TELEMATICS

In %



LCVs

## HOW TO READ THE RESULTS ?

Among companies owning LCVs, 48% use telematics for LCVs

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

Basis: companies with at least one LCV in fleet



TOTAL

32

28



19

17



28

26



35

30



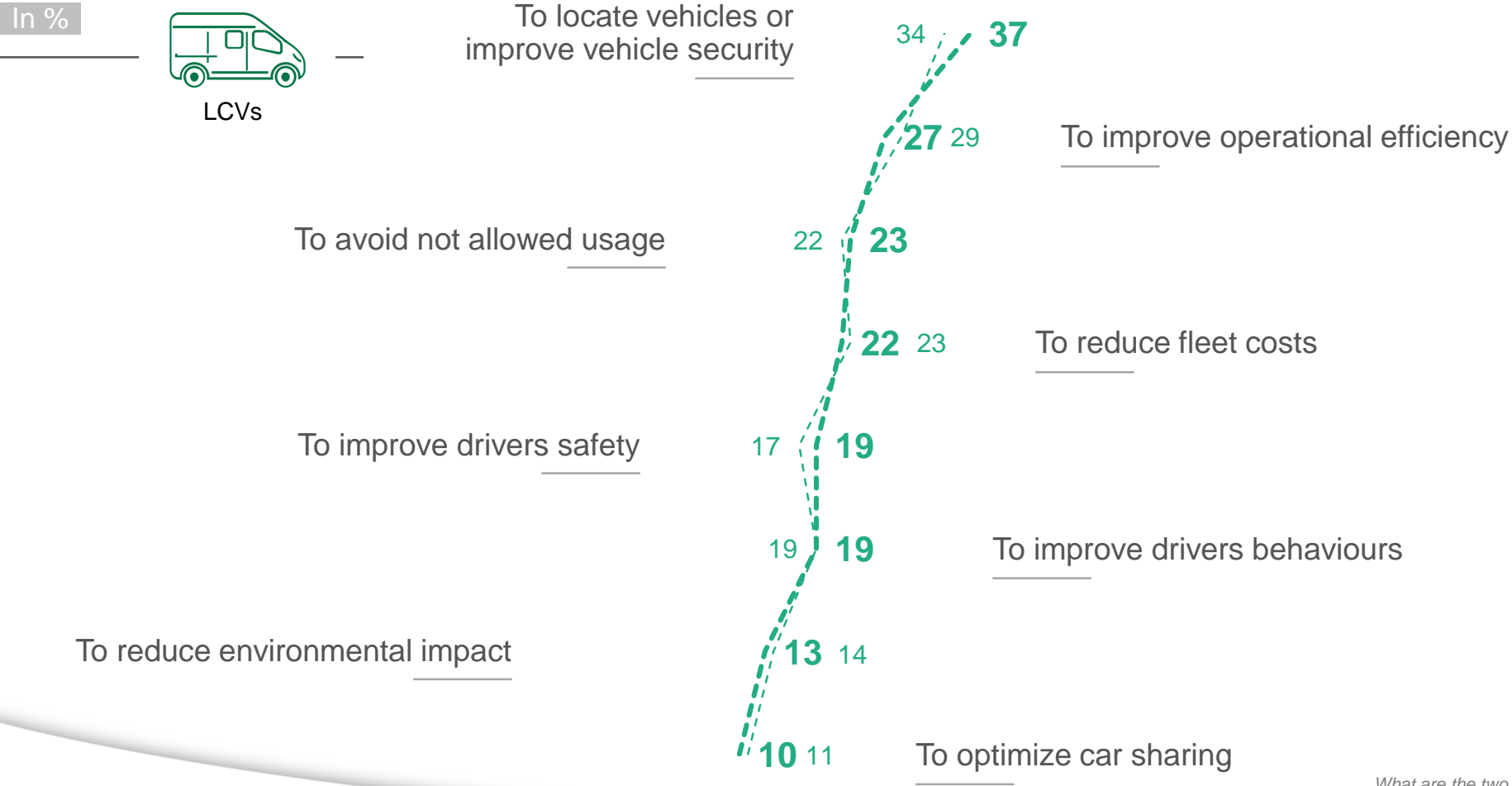
47

42

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

# REASONS FOR USING TELEMATICS

LCVs



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



# BARRIERS TO TELEMATICS

## LCVs

In %



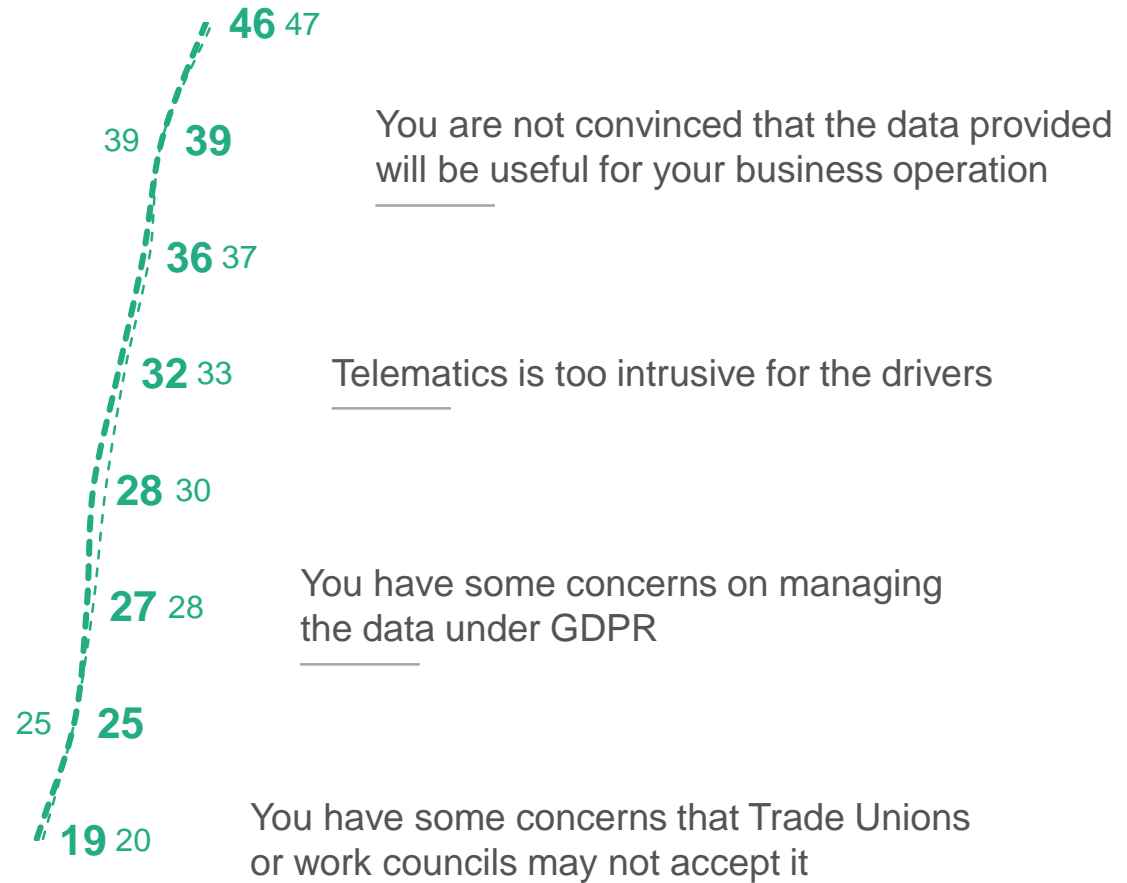
LCVs

You are not convinced that there will be a return on investment

There is not enough resource available to manage the data effectively.

You have some concerns that employees will not accept it

You are not convinced that it works



What are the barriers to telematics usage in the future?  
Basis: companies with LCVs which have not implemented Telematics



THANK YOU

**KANTAR**

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Yael.BENNATHAN@arval.com

Arval Mobility  
Observatory