



MOBILITY AND FLEET BAROMETER 2023

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1

CONTEXT AND METHODOLOGY



KEY THEMES FOR ARVAL MOBILITY OBSERVATORY



1

WHAT SHORT TERM
SHIFTS ARE SHAPING THE
MARKET?



2

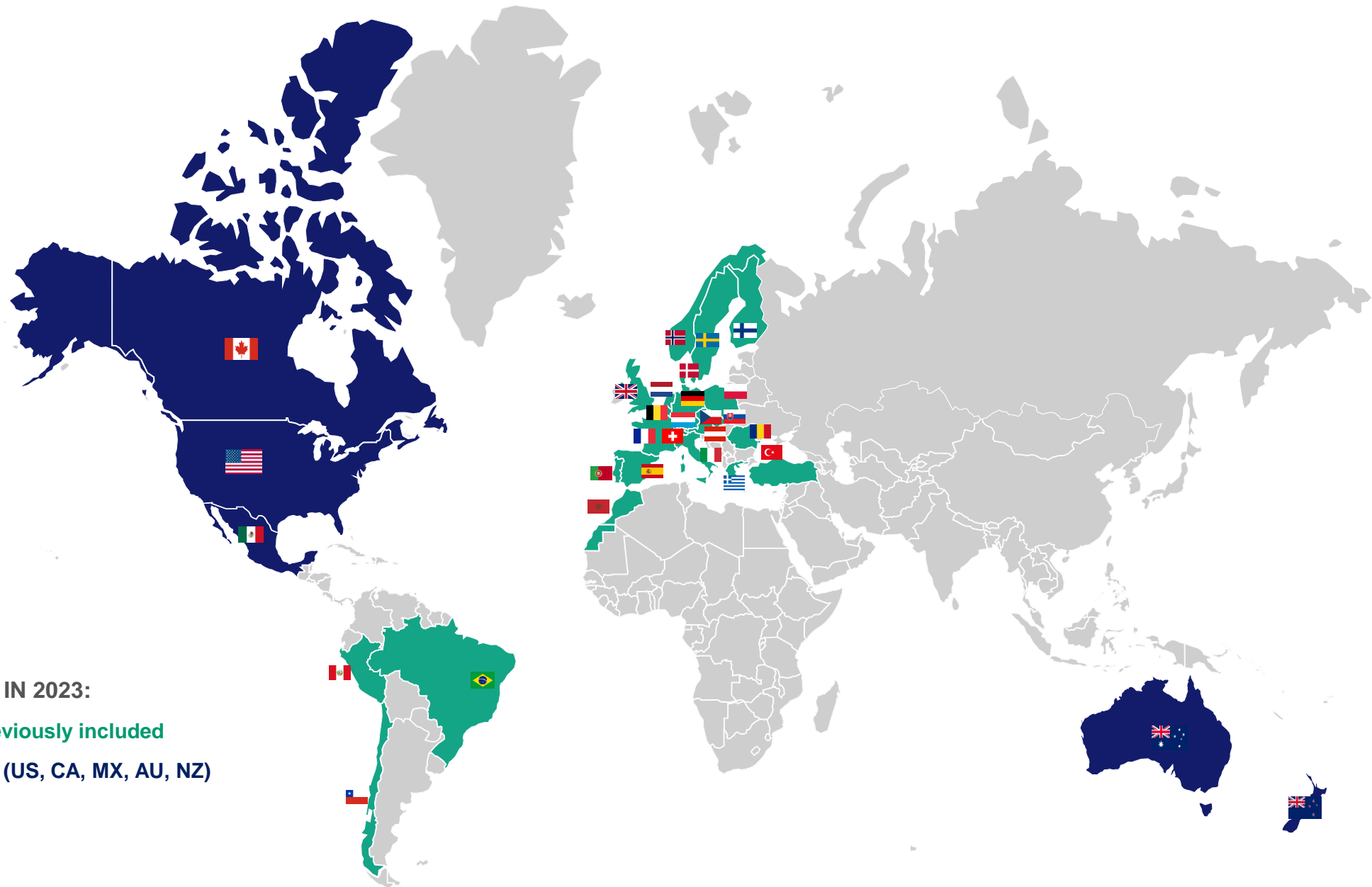
WHAT KIND OF VEHICLES
WILL THE MARKET
EXPECT IN 3 YEARS?



3

HOW DO MOBILITY
SOLUTIONS IMPACT
FLEET MANAGEMENT?

SCOPE OF THE SURVEY



30 COUNTRIES IN 2023:

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

COMPANY SIZE SEGMENT DEFINITION

WORLD

EUROPE

OUT OF EUROPE

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



METHODOLOGY



DATA COLLECTION METHOD



FIELDWORK PERIOD



TARGET



QUOTAS

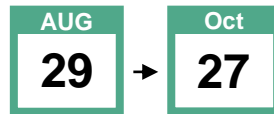


SAMPLE



DURATION OF INTERVIEW

CATI SYSTEM
(Computer Assisted Telephone Interviewing)
Recruitment by telephone



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

COMPANY SIZE & SECTOR

5865 | Europe

1650 | Americas

1107

20
minutes
on average

8622 | Interviews in total

READING NOTES ABOUT THE REPORT

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



XX | Significantly higher than 2022 year



XX | Significantly higher than 2021 year

XX = score 2022 or 2021



XX | Significantly lower than 2022 year



XX | Significantly lower than 2021 year

XX = score 2022 or 2021

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

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

NUMBER OF INTERVIEWS CONDUCTED IN BELGIUM



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



Companies with Less than 10 empl.
99 INTERVIEWS



Companies with 10 - 99 empl.
59 INTERVIEWS



Companies with 100 - 499 empl.
85 INTERVIEWS



Companies with 500 empl. or more
60 INTERVIEWS

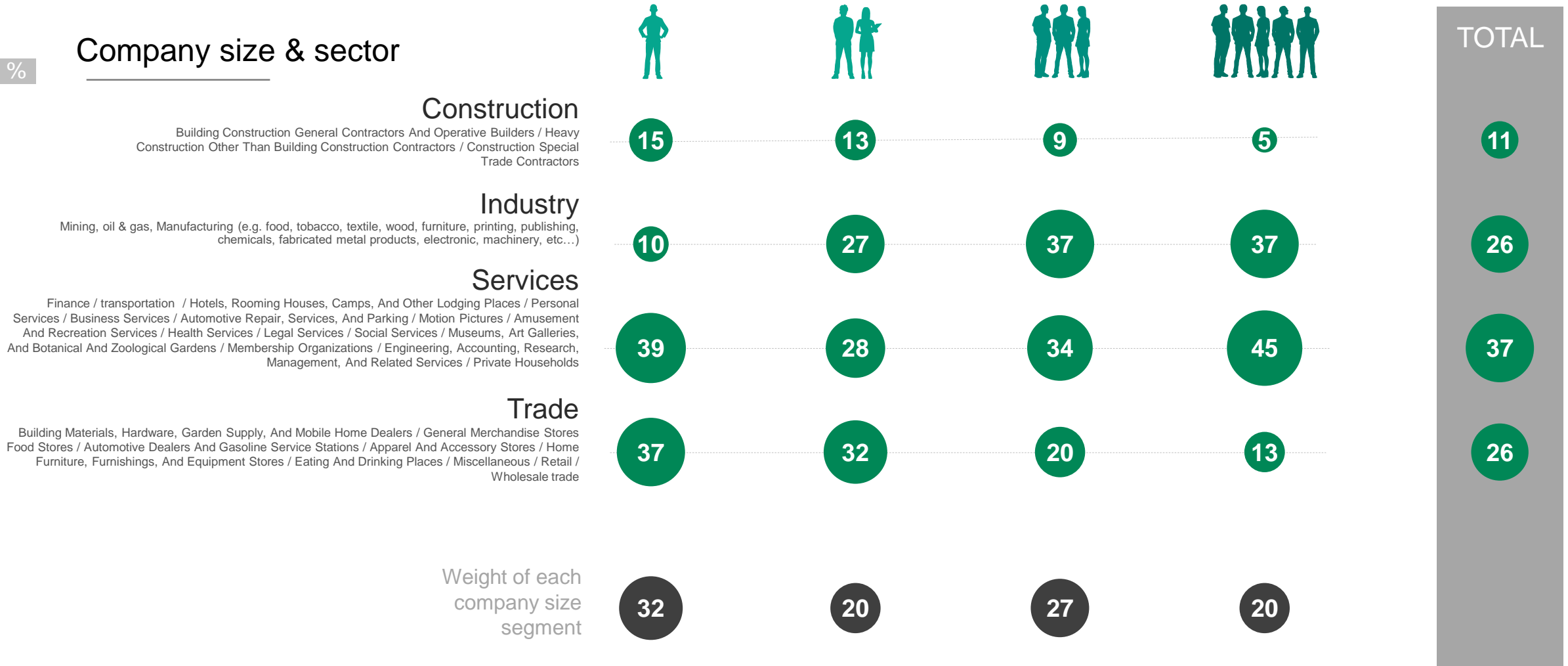


SAMPLE STRUCTURE IN BELGIUM



In %

Company size & sector



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

MOBILITY SOLUTIONS LIST AND DEFINITIONS



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



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



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



AN APP TO BOOK MOBILITY SOLUTIONS PROVIDED BY THE COMPANY



BIKE (OR OTHER TWO WHEELS) SHARING / BIKE (OR OTHER TWO WHEELS) LEASING solution provided by the company



PRIVATE LEASE OR SALARY SACRIFICE (private lease where an employee leases a car on his own behalf / salary sacrifice where an employee leases a car via their employer)



PUBLIC TRANSPORT



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



CAR OR CASH ALLOWANCE *New item

2

EXECUTIVE SUMMARY



INSIGHT 1: BELGIAN COMPANIES REMAIN CONFIDENT ABOUT THEIR FUTURE FLEETS

#1

A FLEET GROWTH MOSTLY DRIVEN BY BUSINESS DEVELOPMENT

- **A large majority of Belgian companies expect that their fleet will remain stable or even increase, following the same trend than other European countries.**
- **This optimism regarding fleet growth relies primarily on business development and, to a lesser extent but in progression, on the induced HR needs.**
- **Despite the development of homeworking, this new way of work doesn't seem to have a major impact on mobility policies.**
- **Belgian fleet managers seem more concerned by the future challenges expected : implementing alternative fuel technologies to adapt to restrictive public policies and to the expansion of low emission zones.**

#2

OPERATING LEASING IS GAINING GROUND

- **A high potential for growth for operating leasing**, currently the second most used fleet financing method in Belgium :
- **Operating leasing is just behind Financial leasing**, the main fleet financing method used within Belgian companies to date.
- **Almost half of Belgian companies want to introduce or increase the use of Operating leasing** in the next 3 years, above the European trend.

INSIGHT 3: THE ADOPTION OF ALTERNATIVE FUEL TECHNOLOGIES PROGRESSES

#3

ALTERNATIVE FUELS PRIMARILY REPRESENTED BY HYBRIDS AND PLUG-IN HYBRIDS IN BELGIAN FLEETS

- In 2023, **7 companies out of 10 have adopted or consider adopting at least one alternative fuel technology** (Hybrid, Plug-in hybrid or 100% BEV) **for their passenger cars.**
 - Belgian companies are slightly below the European average.
 - **Hybrids and Plug-in hybrids still dominate the market of the alternative fuels.**
 - 100% BEV remains at a lower level
 - **The energy transition is mostly driven by financial reasons** (reduction of fuel expenses and reduction of total cost of ownership), and by **the constraint of low emission zones.**
- **Focusing on 100% BEV, the purchase price remains the strongest barrier** to the adoption of this technology : it's constraining for half of Belgian companies.
- Although less important, **charging difficulties are also mentioned.** That's why two third of companies consider to set up charging points in their company and almost half of them consider assisting their employees in the installation of home charging solutions.

A SLOWER ADOPTION OF ALTERNATIVE FUEL TECHNOLOGIES THAN IN OTHER EUROPEAN COUNTRIES, ESPECIALLY REGARDING 100% BEV FOR PASSENGER CARS

1

- In 2023, 7 Belgian companies out of 10 already use or consider using at least one alternative fuel technology in the next 3 years, below the European average (77%).

While more than 4 out of 10 Belgian companies consider using Plug-in Hybrid and Hybrid (in line with European results), only 17% are already using or considering 100% BEV, in decrease compared to last year and well behind the European trend (40%).

The main motivations for adopting these technologies for passenger cars consist in economic considerations (reducing fuel expenses and the cost of ownership) and, in line with the expected future challenges, in the ability to drive in Low Emission Zone.

2

- As for LCVs, 28% of Belgian companies already use or consider using 100% BEV, which is stable compared with last year. And 10% of Belgian companies already use or consider using Hydrogen Fuel cell. The adoption of fuel alternative technologies is mainly driven by the reduction of fuel expenses.

3

- Focusing on 100% BEV, the purchase price remains the strongest barrier to the adoption of this technology : it's constraining for half of Belgian companies. Although less important, the charging difficulties count also, that's why two third of companies consider to set up charging points in their company and almost half of them consider assisting their employees in the installation of charging solutions at their homes.

4

- Whether for passenger cars or LCVs, Belgian companies are less optimistic than the rest of Europe concerning the mid-term adoption of alternative technologies : they estimate that more than 8 company's vehicles out of 10 will be petrol or diesel vehicles in 3 years.

#4

BIKE IS ESPECIALLY CONSIDERED

- This year, almost 8 out of 10 companies already using at least one solution, ahead of the European average.
- Bike sharing or leasing is the most widespread mobility solution.
- In big companies, corporate car sharing, mobility budget and booking app are also already widely implemented.
- The compliance with CSR policy is by far the main reason to adopt mobility solutions, and to a lesser for employer branding. Therefore, mobility plan is more and more widespread : one third of Belgian companies offer or consider offering it to their employees (versus one fourth last year).

INSIGHT 5: TELEMATICS ADOPTION MILDLY INCREASES

#5

- **One third of Belgian companies uses connected vehicles, and even more among SMEs.**
- The main reason for adoption remains the **vehicle location and security.**
- **Moreover, to improve road safety, a quarter of Belgian companies have already bought or consider buying vehicles with native device relating to road safety on it.**

3

WHAT ARE THE MAIN CHARACTERISTICS OF THE FLEETS?

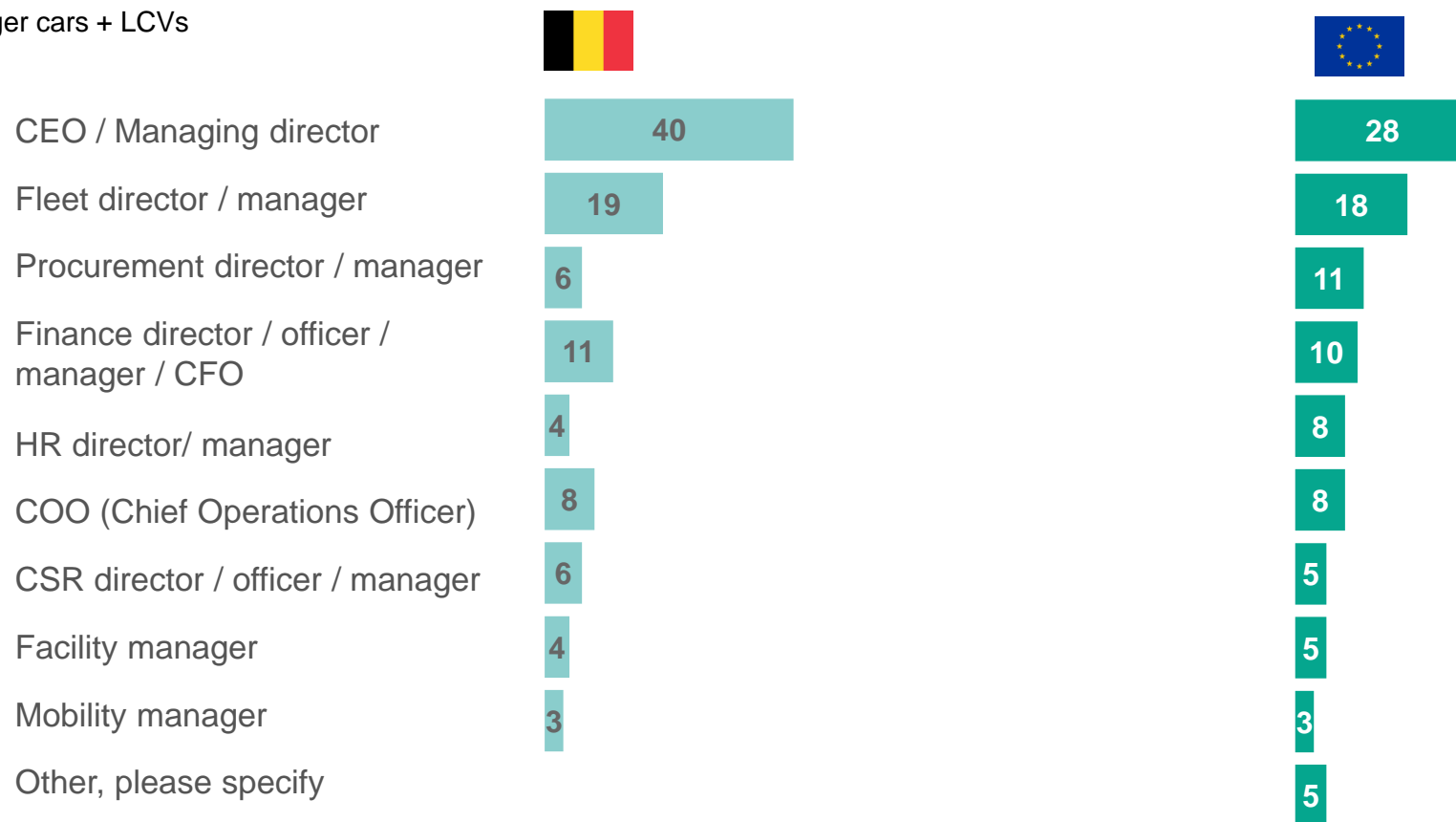


RESPONDENTS POSITION WITHIN THE COMPANY

In %



Passenger cars + LCVs



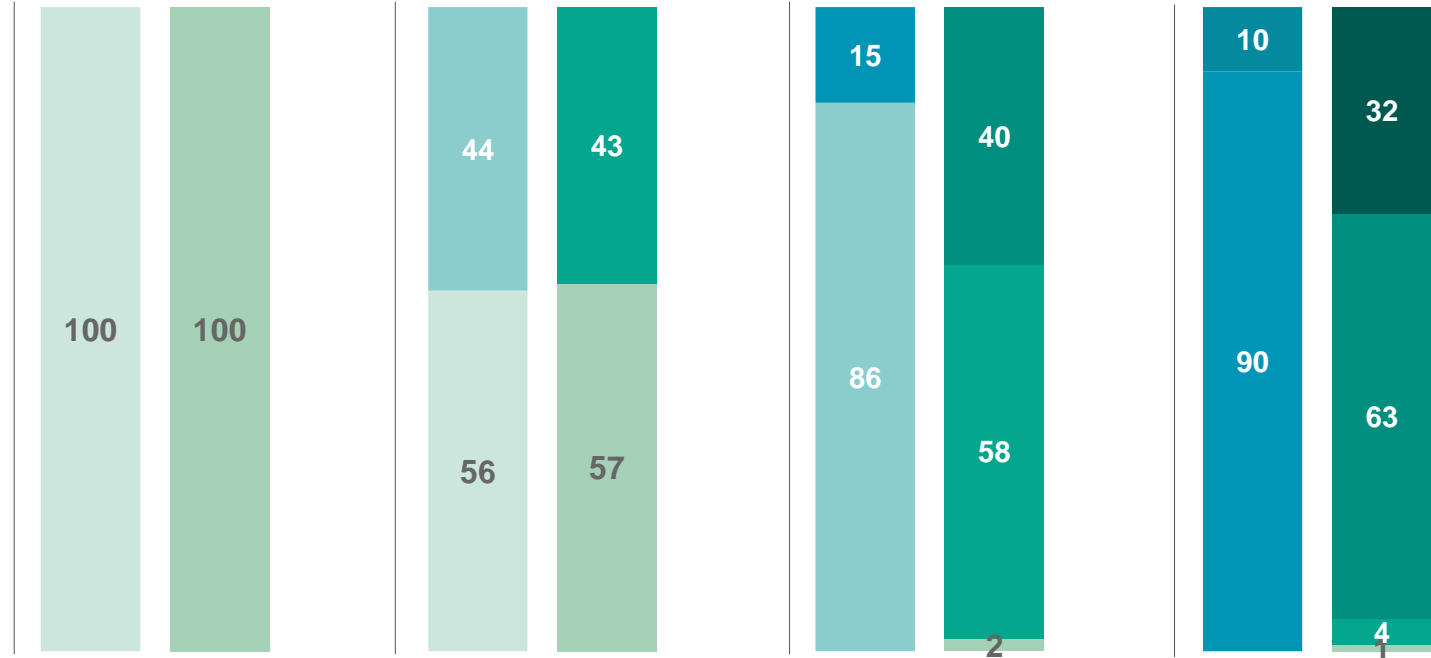
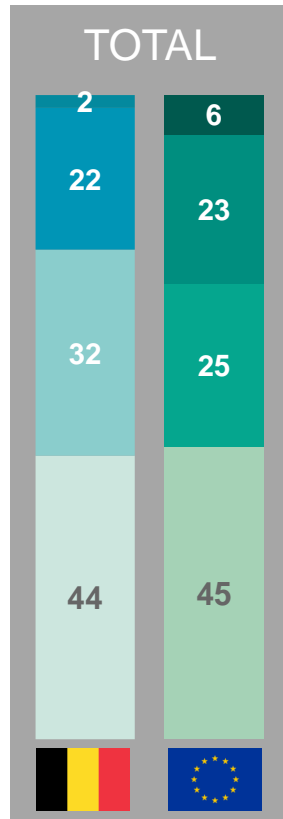
NUMBER OF VEHICLES IN FLEET

In %



Passenger cars + LCVs

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

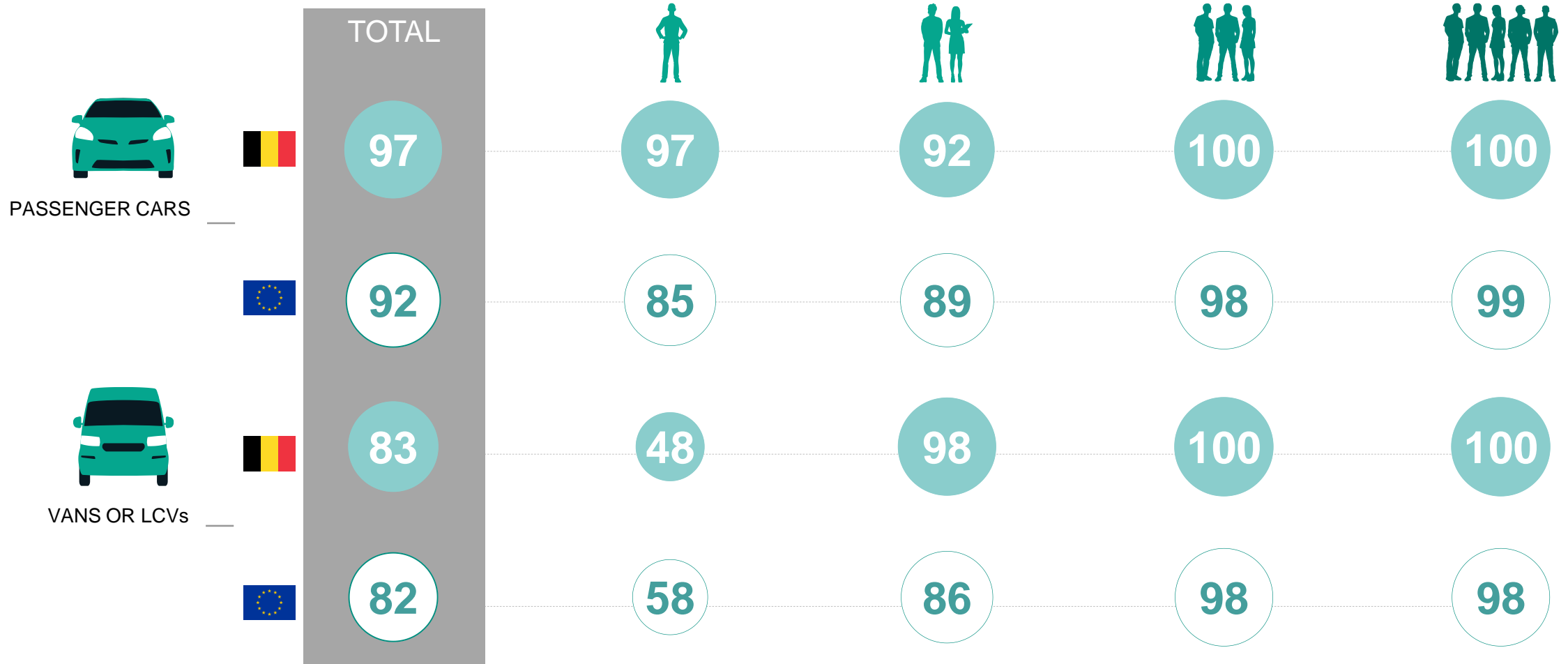


Can you please tell us the total number of vehicles of less than 3.5 tons in your fleet?
Basis: companies with corporate vehicles = 100%

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

(among companies with at least one vehicle in fleet)

In %



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

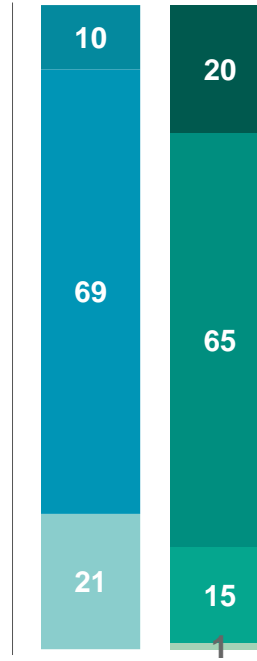
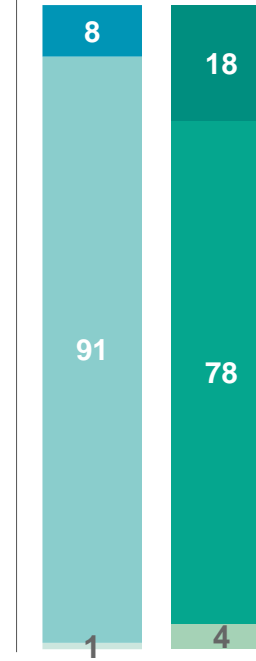
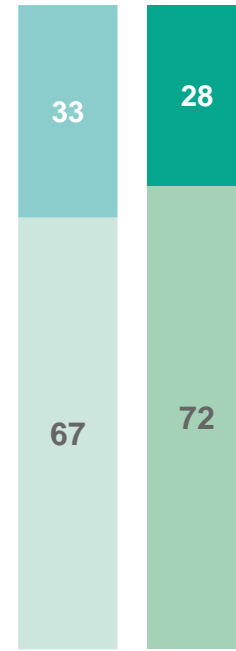
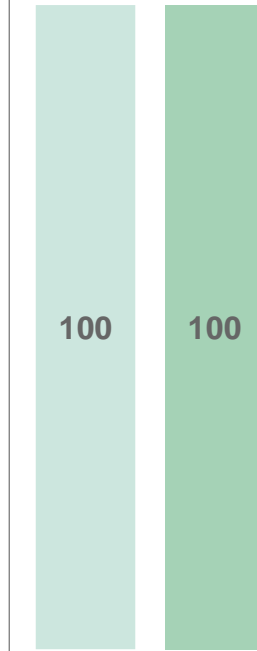
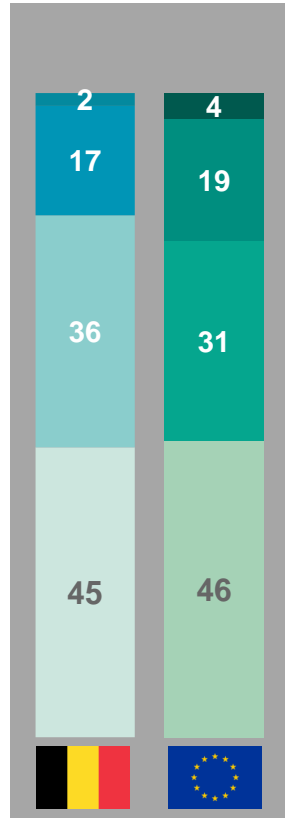
NUMBER OF PASSENGER CARS IN FLEET

In %



Passenger cars

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



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

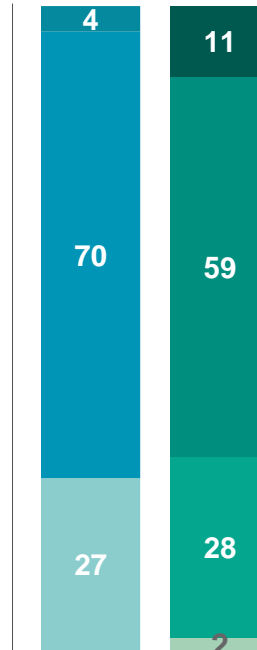
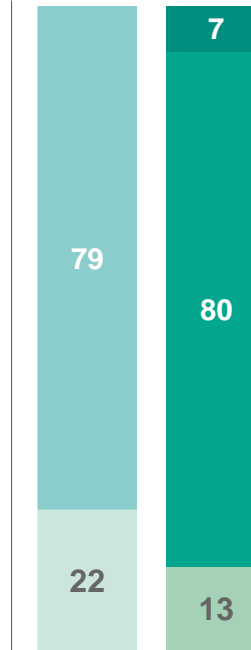
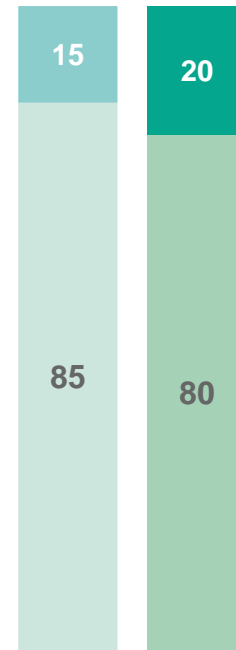
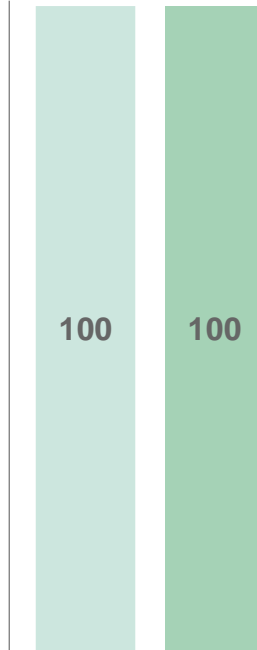
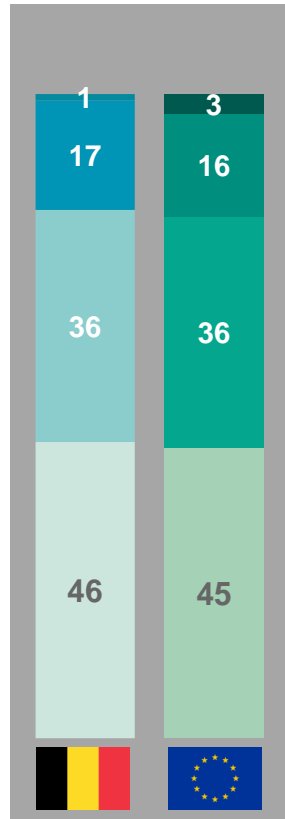
NUMBER OF LCVS IN FLEET

In %



LCVs

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



And can you please tell us the total number of LCVs or vans in your fleet?
Basis: companies with LCVS

VEHICLES POSSESSION LENGTH



Passenger cars + LCVs

AVERAGE IN YEARS



5.3



5.6

TOTAL



5.7



4.9



4.5



5.9

5.6

5.7

5.6

5.6

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

PASSENGER CARS POSSESSION LENGTH



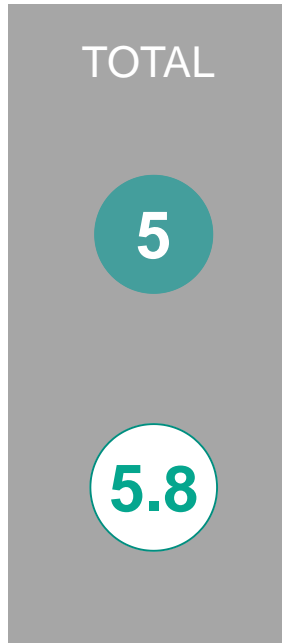
New question added in 2023
And how long do you keep your passenger cars (before being sold or returned to the leasing company)?
Basis: companies with passenger cars

LCVS POSSESSION LENGTH



LCVs

AVERAGE IN YEARS



6.1

5.8



4.9

5.9



4.5

5.7



4.7

5.7

FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

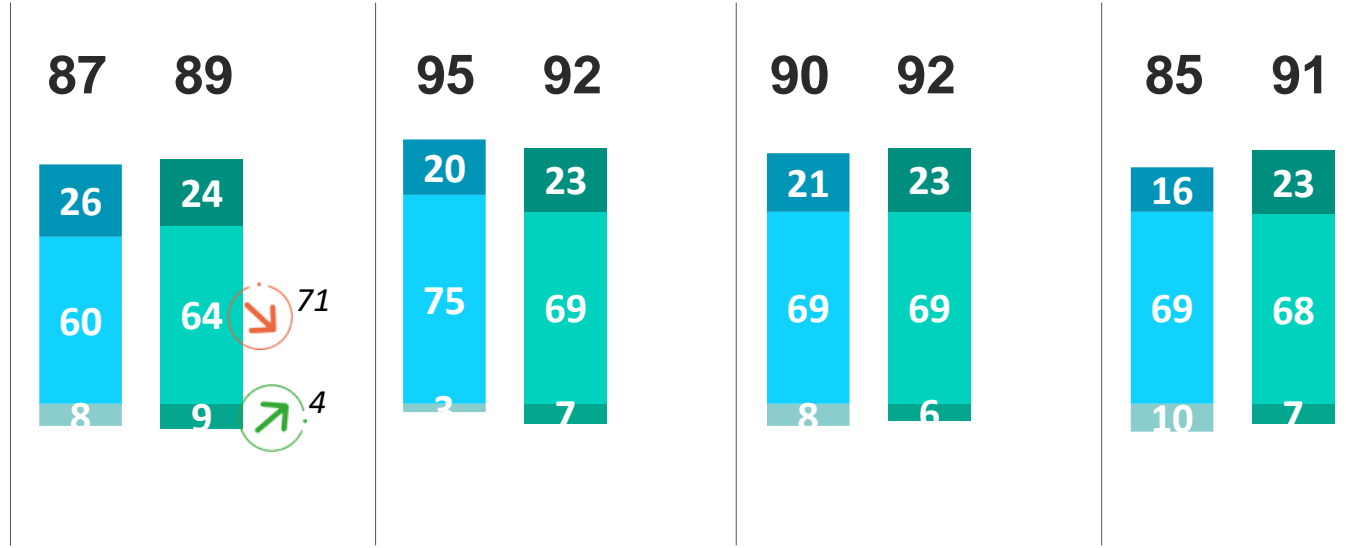
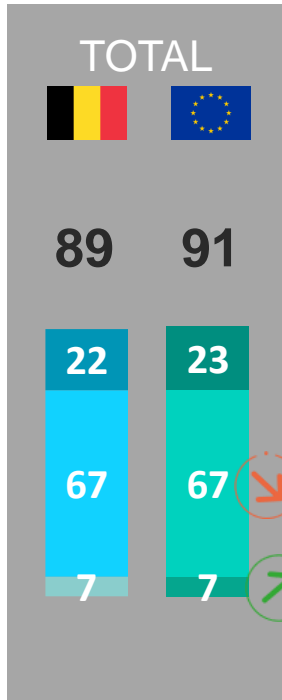
In Belgium, 89% of the companies declare that in the next 3 years their company fleet will remain stable or increase.

In %



Passenger cars + LCVs

% Stable or increase



BALANCE in pts (INCREASE ⊖ DECREASE)

| | | | | | | | | | | |
|------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| 2023 | +14 | +16 | +19 | +15 | +17 | +16 | +13 | +17 | +6 | +16 |
| 2022 | +13 | +18 | +13 | +19 | +15 | +17 | +12 | +17 | +12 | +17 |
| 2021 | +29 | +35 | +22 | +22 | +23 | +31 | +32 | +43 | +40 | +50 |



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

FLEET GROWTH POTENTIAL

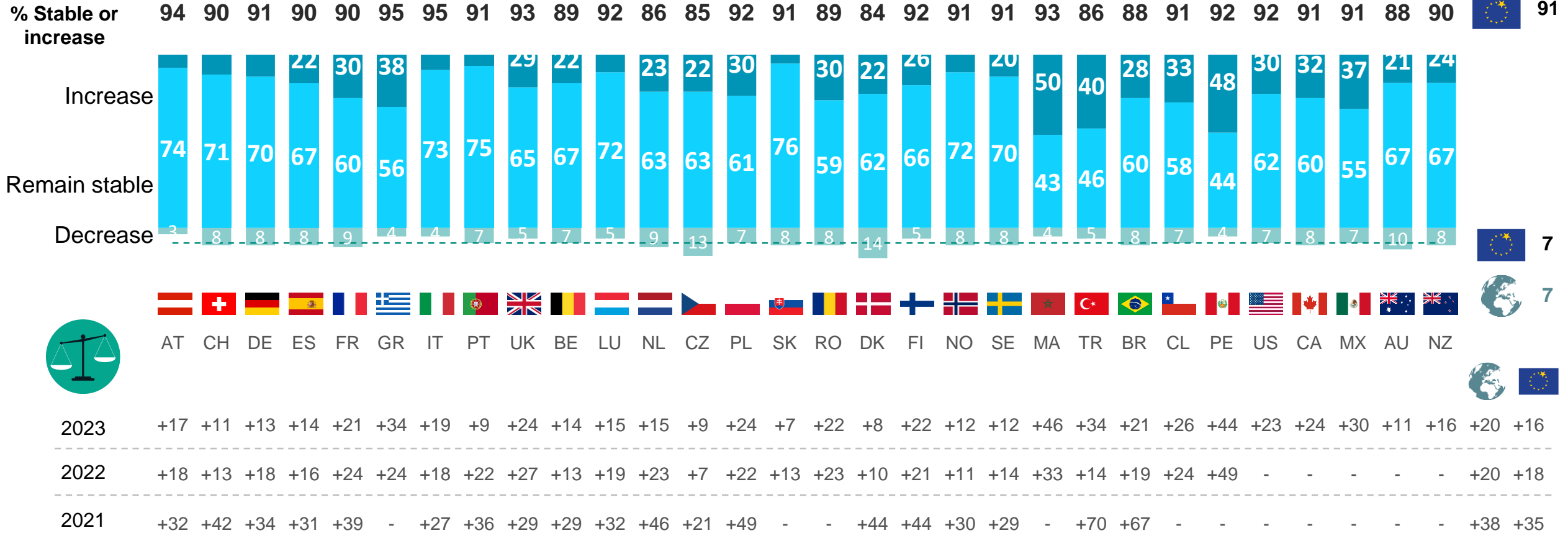
In %



Passenger cars + LCVs

HOW TO READ THE RESULTS ?

In Belgium, 89% of the companies declare that in the next 3 years their company fleet will remain stable or increase.



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

PASSENGER CAR FLEET GROWTH POTENTIAL

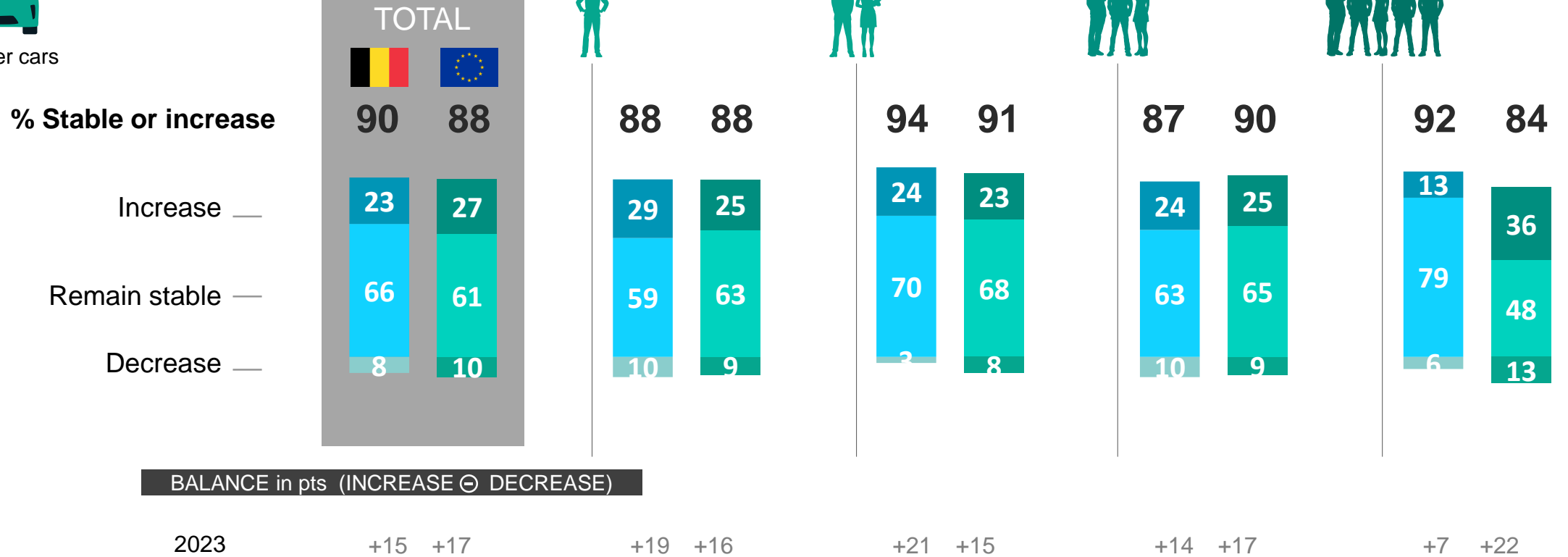
In %



Passenger cars

HOW TO READ THE RESULTS ?

In Belgium, 90% of the companies declare that in the next 3 years the total number of passenger cars will remain stable or increase.



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

PASSENGER CAR FLEET GROWTH POTENTIAL

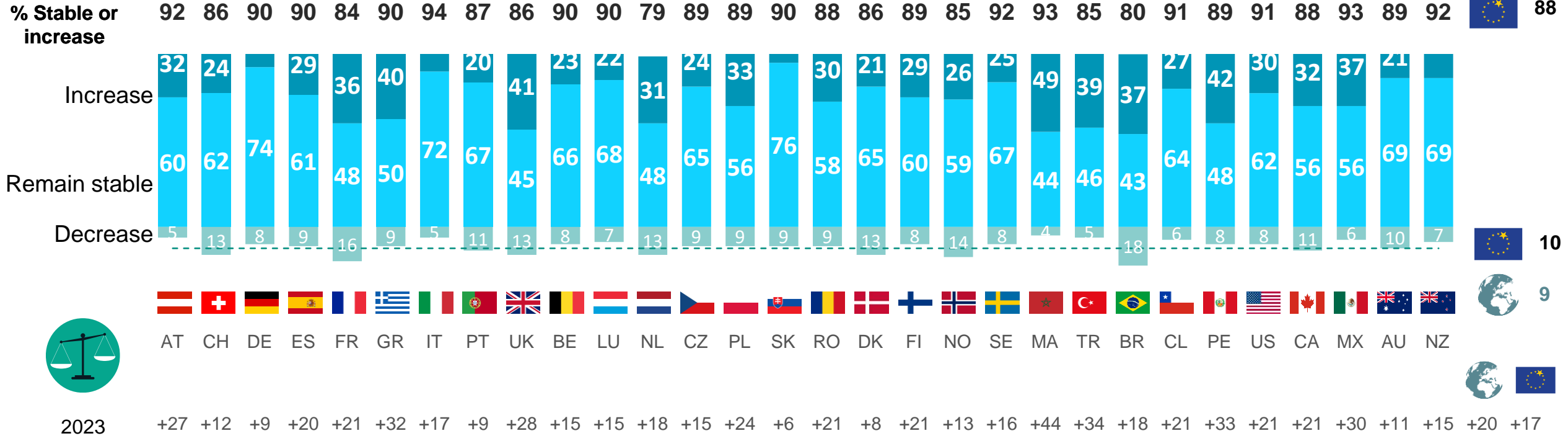
HOW TO READ THE RESULTS ?

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

In %



Passenger cars



New question added in 2023

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

Basis: companies with passenger cars

LCVS FLEET GROWTH POTENTIAL

In %



LCVs

HOW TO READ THE RESULTS ?

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

% Stable or increase

TOTAL



86 89

Increase

16 26

Remain stable

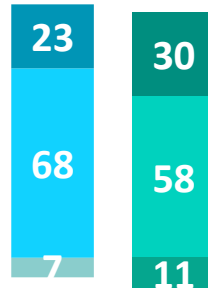
70 63

Decrease

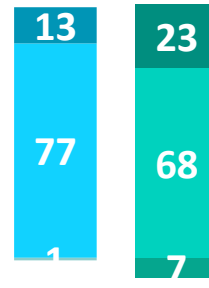
9 9



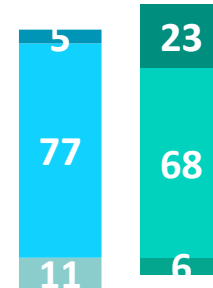
91 88



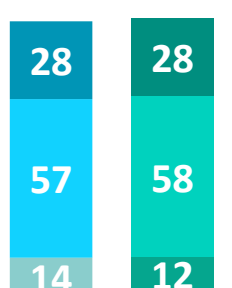
90 91



82 92



85 86



BALANCE in pts (INCREASE ⊖ DECREASE)

2023

+7 +17

+16 +19

+12 +15

-7 +17

+15 +17

New question added in 2023

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

Basis: companies with LCVs

LCVS FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

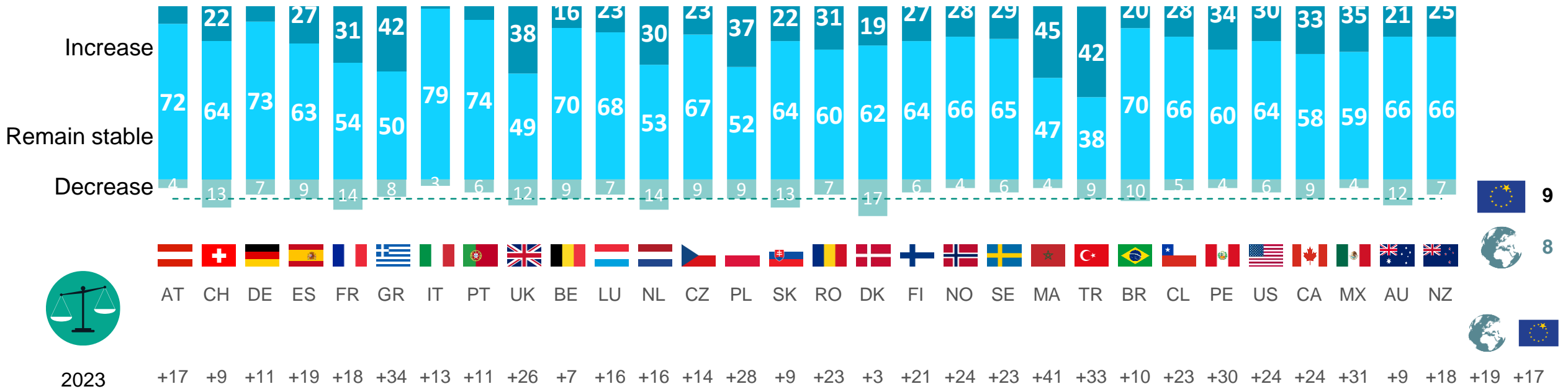
In Belgium, 86% of the companies declare that in the next 3 years their company fleet of LCVs will remain stable or increase.

In %



LCVs

% Stable or increase



2023

New question added in 2023

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

Basis: companies with LCVs

REASON FOR FUTURE FLEET INCREASE



In %



Passenger cars + LCVs

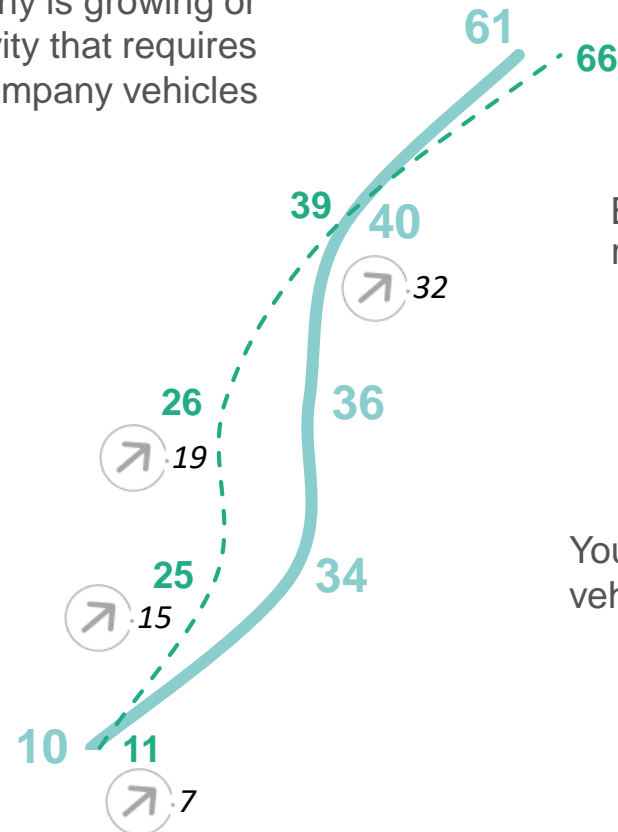
Because your company is growing or developing a new activity that requires company vehicles

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

Because of tax decreases

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

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



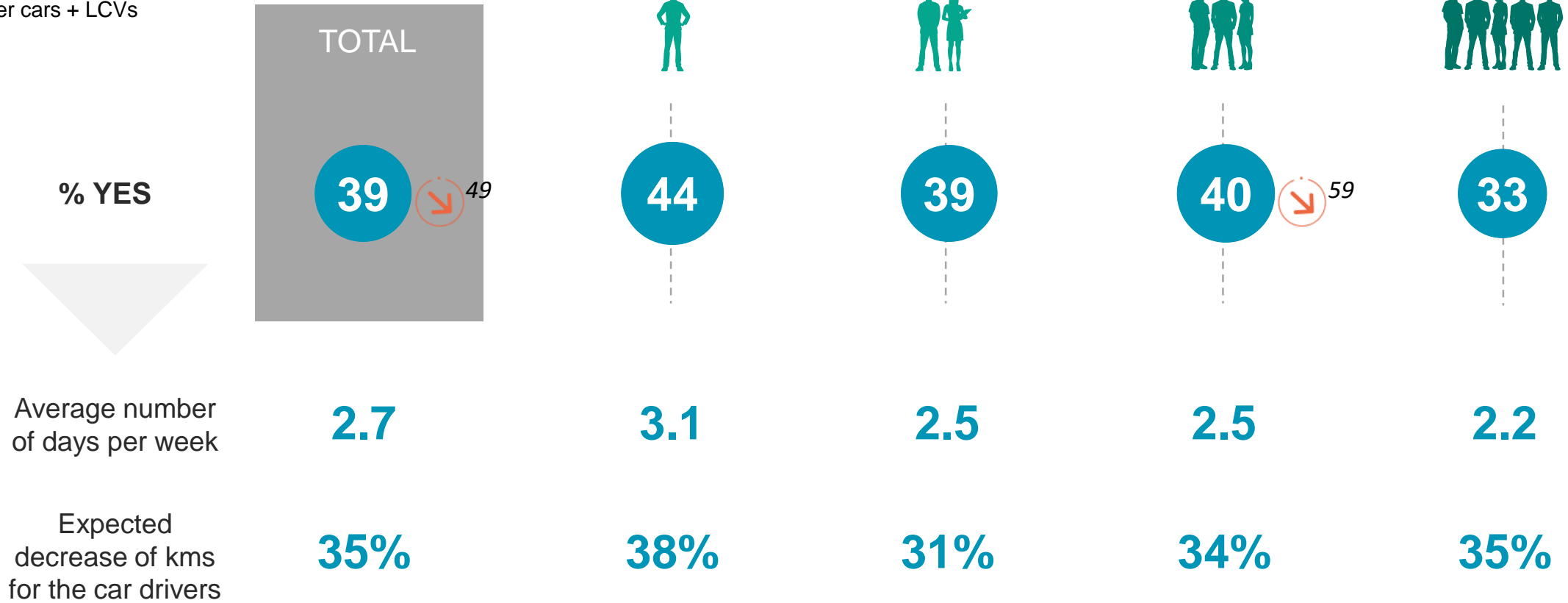
Why do you think the total number of vehicles in your company fleet will increase?
Basis: companies expecting an increase of the fleet

READY TO INTRODUCE OR INCREASE HOMEWORKING

In %



Passenger cars + LCVs



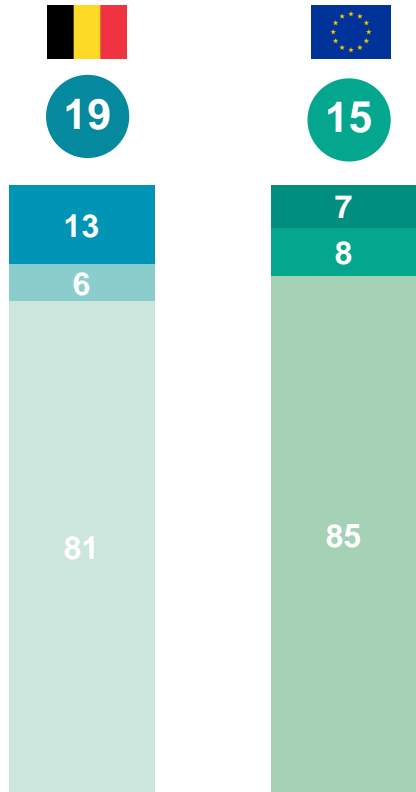
Would you be ready to introduce or increase homeworking for your employees?
 How many days per week would you allow homeworking for your employees?
 What should be the expected decrease of kilometers for your company car drivers?
 Basis: companies with corporate vehicles = 100%

MOBILITY POLICY ADAPTATION COINCIDING WITH HOMEWORKING

In %



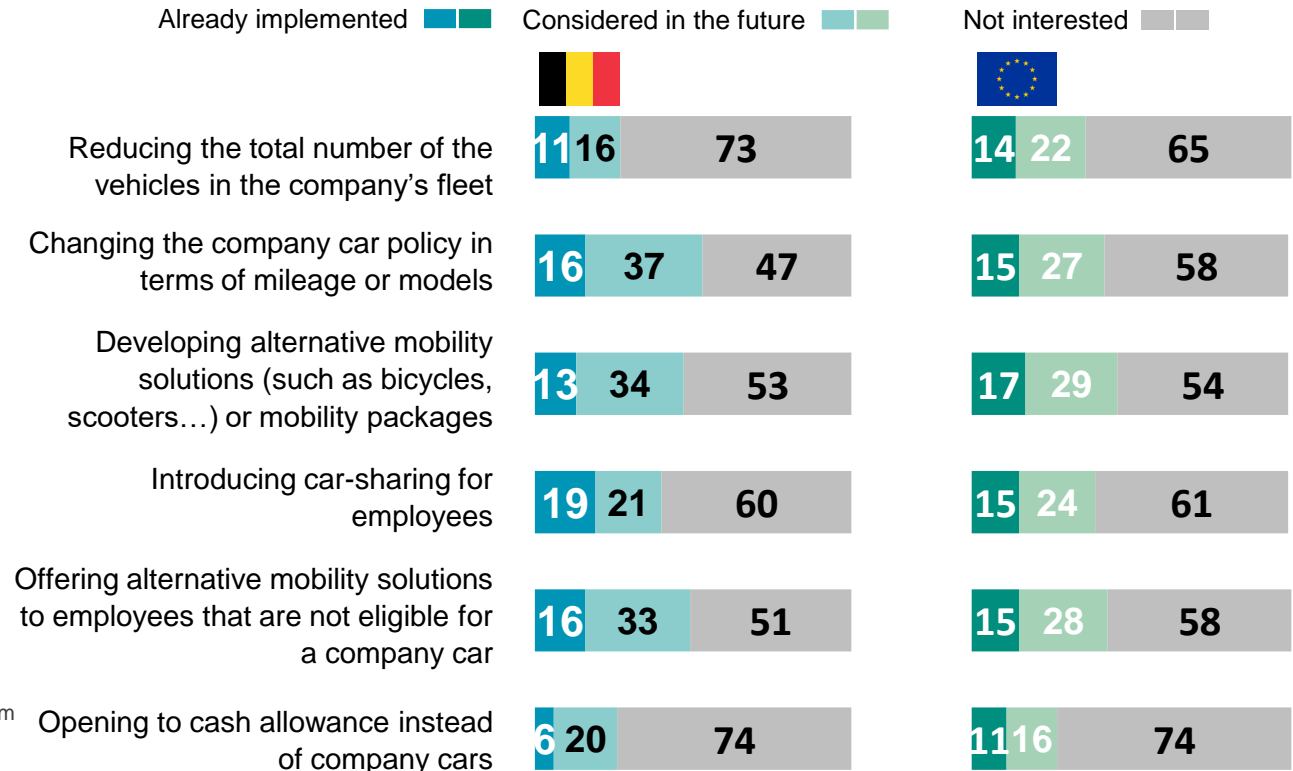
Passenger cars + LCVs



NET CHANGED THE POLICY OR CONSIDER CHANGING

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

HOW TO READ THE RESULTS ?
 In Belgium, among the companies that changed or consider changing their mobility policy, 11% have already reduced the total number of the vehicles in the company's fleet.



Basis: companies with corporate vehicles = 100%

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

This question has been asked differently in 2023.

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

Question asked to respondents that are aware of mobility solutions

MOST IMPORTANT CHALLENGES EXPECTED

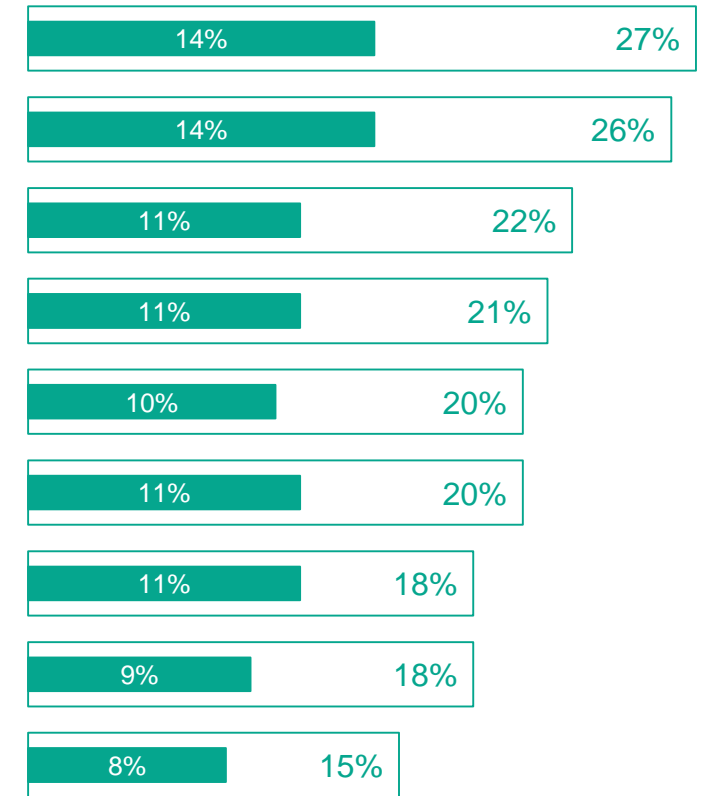
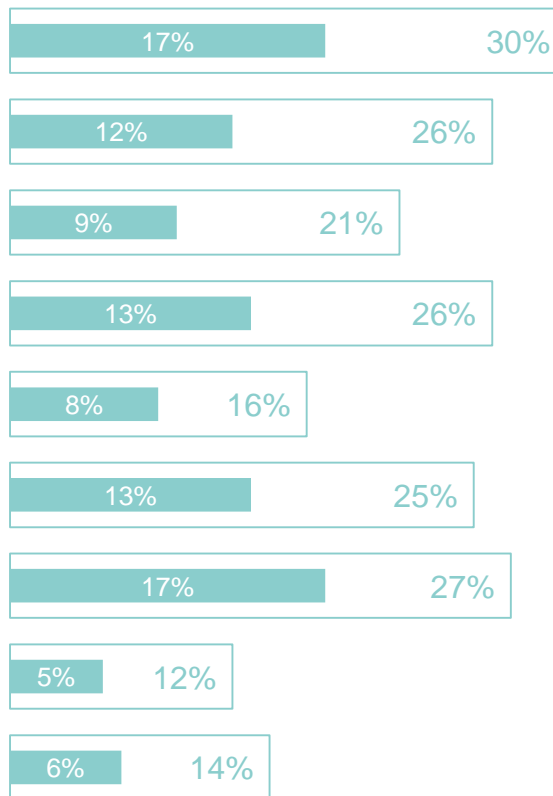
In %



Passenger cars + LCVs

Nb 1 challenge
 Top 3 challenges

- Implementing alternative fuel technologies (100% electric vehicles, hybrids, rechargeable hybrids)
- Adapting to restrictive public policies on petrol and diesel vehicles
- Managing longer vehicles' delivery time
- Adapting to the expansion of low emission zones in urban areas
- Mitigating the increase of total cost of ownership of the vehicles
- Inducing more responsible driving among employees
- Adjusting to new ways of working (hybrid between home and office)
- Adapting to evolutions of car selling models (ex. directly from manufacturer without buying through car dealer)
- Implementing other mobility solutions (ex. car sharing, bikes...)



New question added in 2023

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

4

HOW ARE COMPANIES FINANCING THEIR FLEET?



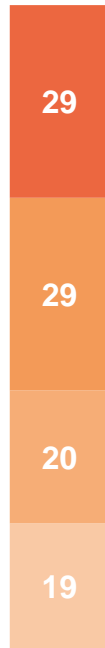
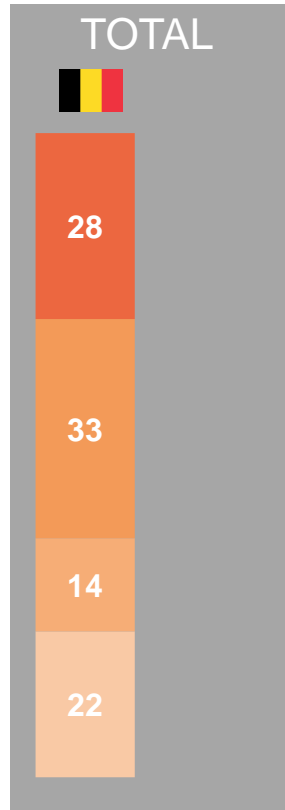
MAIN FLEET FINANCING METHOD

In %



Passenger cars + LCVs

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



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

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

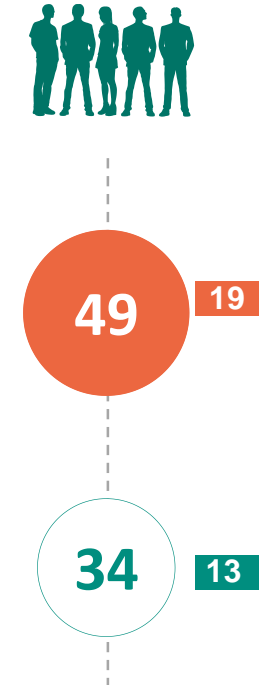
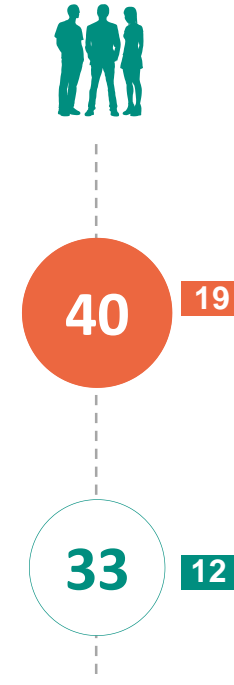
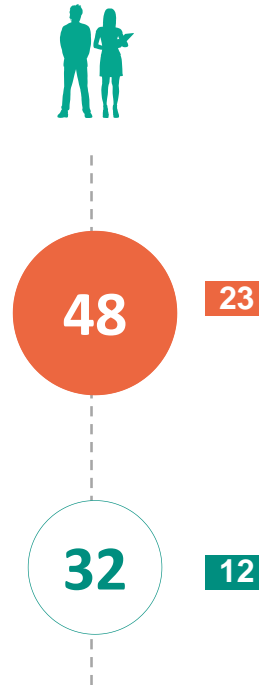
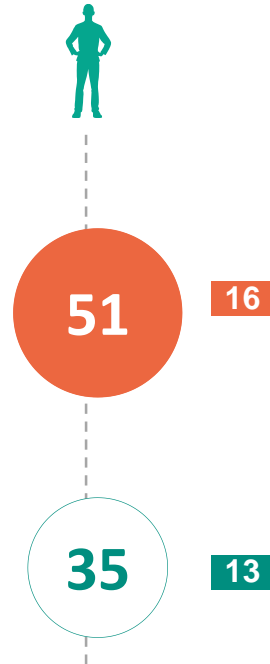
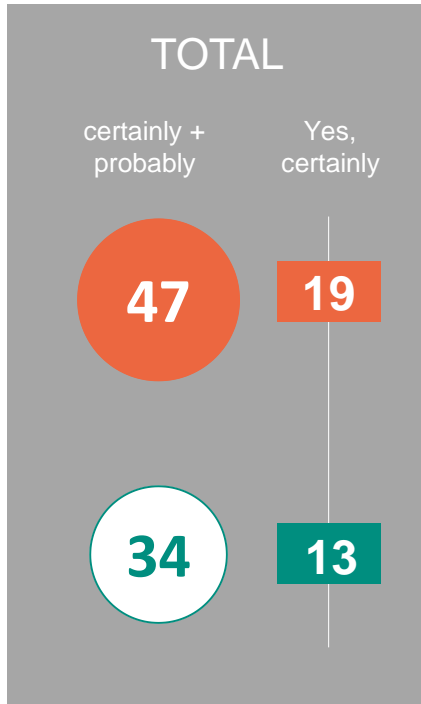
INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATING LEASING

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

In %



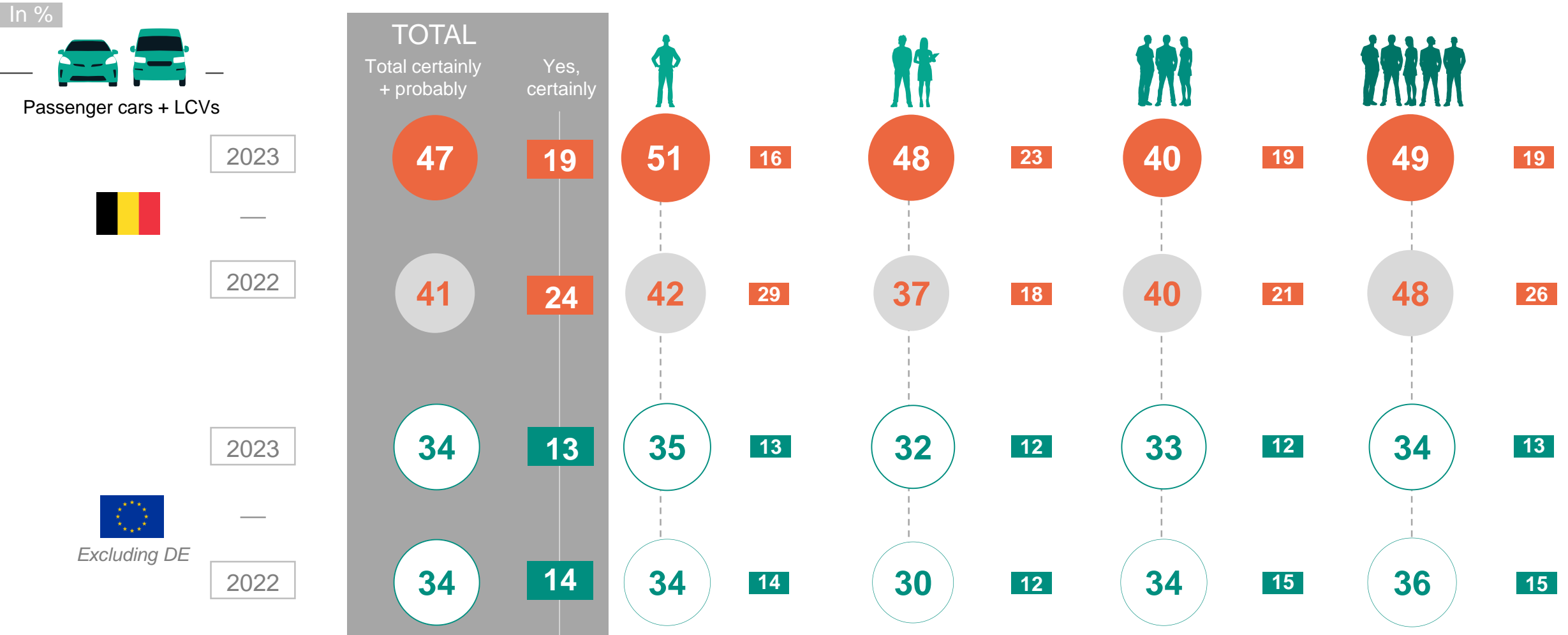
Passenger cars + LCVs



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

INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATING LEASING

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



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

5

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



CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

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

In %



Passenger cars

HOW TO READ THE RESULTS ?

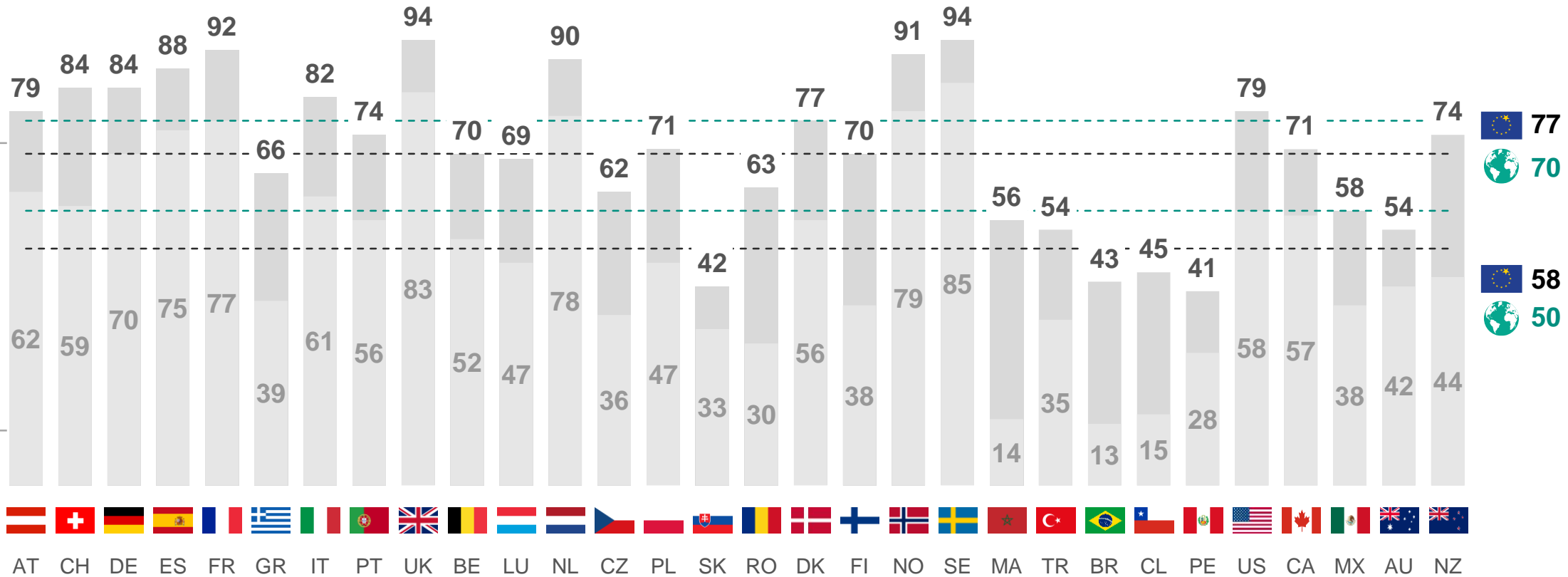
In Belgium, 70% of the companies are already using or consider to implement at least one alternative technology in the next 3 years. 52% of the companies is currently using at least one



ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS



ALREADY USING



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

Basis: companies with passenger cars

CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

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

In %



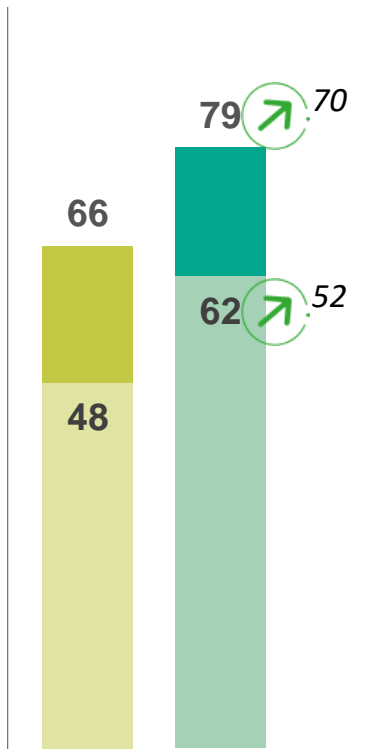
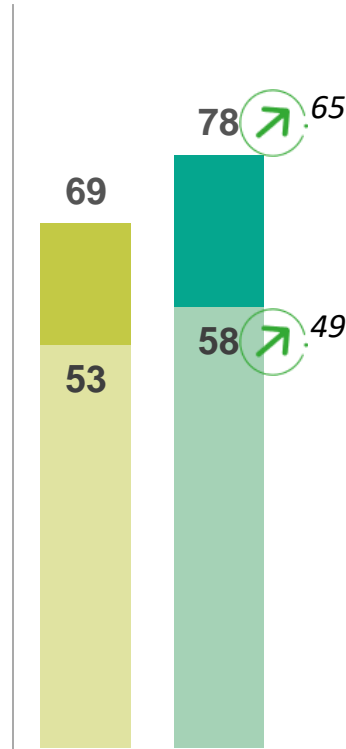
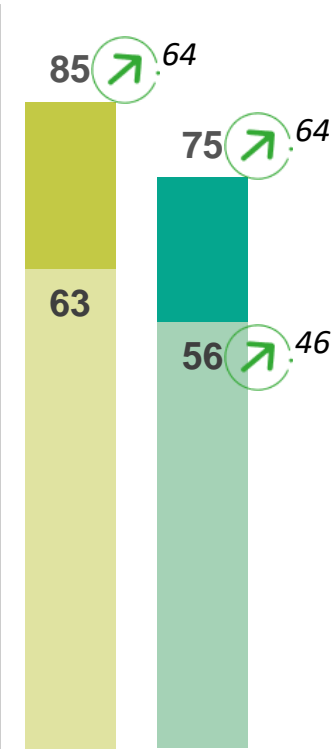
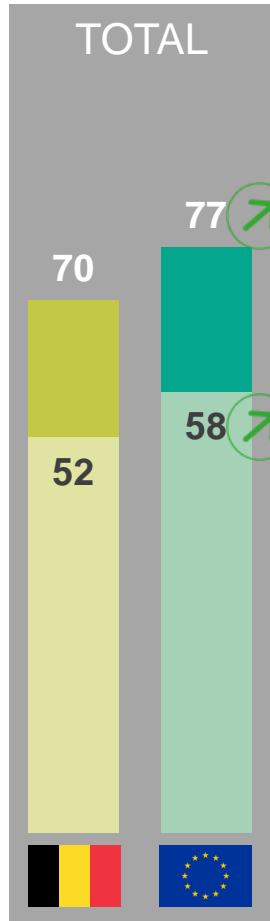
Passenger cars



ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS



ALREADY USING



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

Basis: companies with passenger cars

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Passenger car fleet

In %



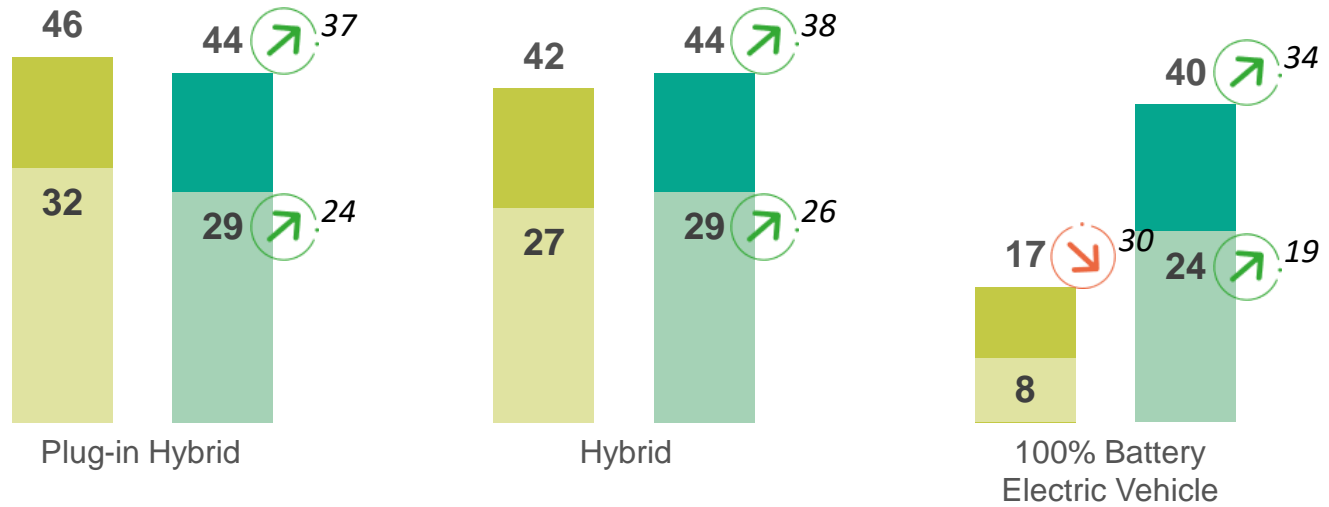
Passenger cars



ALREADY USING
OR CONSIDER
USING IN THE
NEXT 3 YEARS



ALREADY
USING



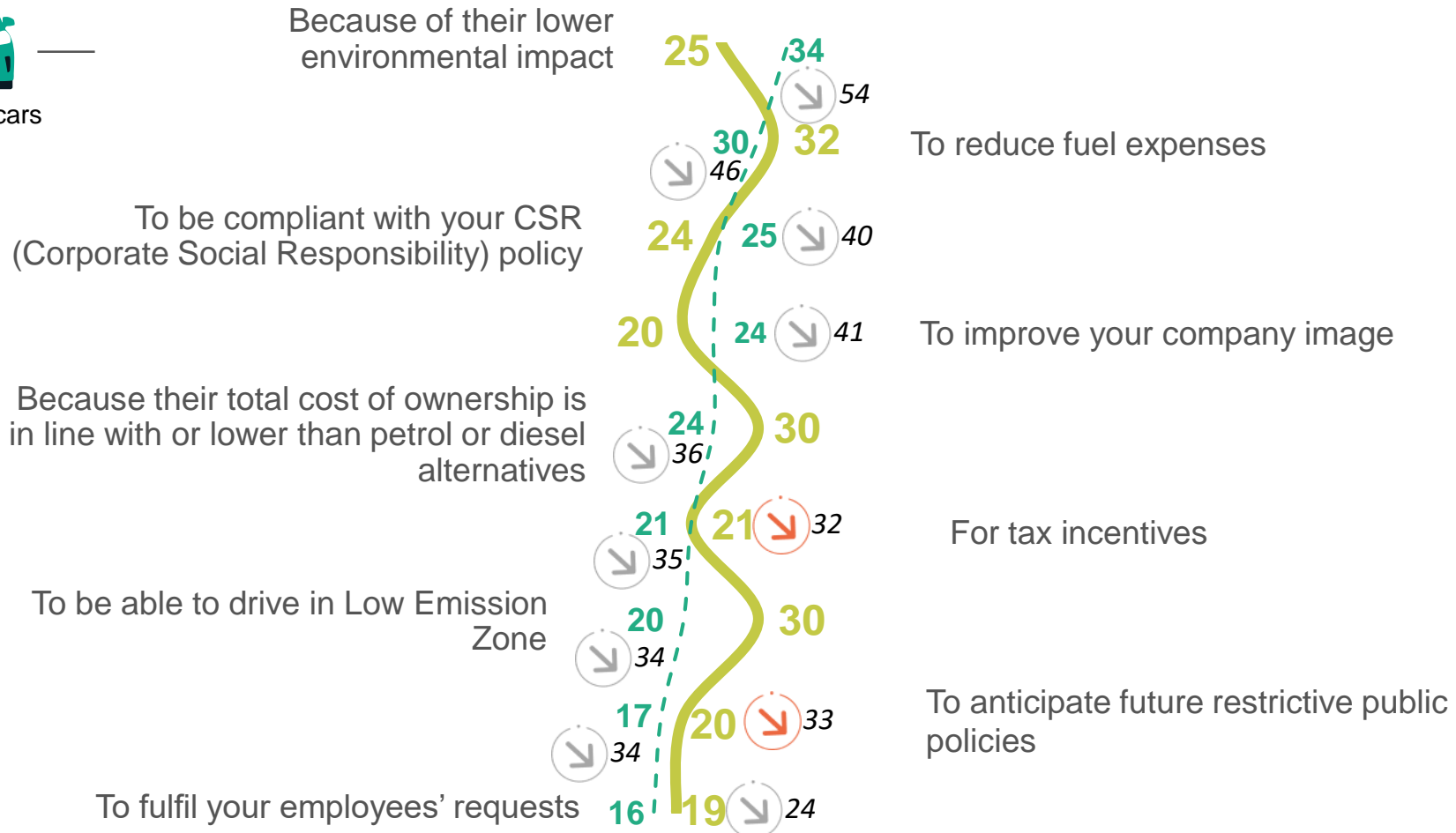
REASONS FOR IMPLEMENTING OR CONSIDERING ALTERNATIVE FUEL TECHNOLOGIES

Passenger car fleet

In %



Passenger cars



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

CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

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

In %



LCVs

HOW TO READ THE RESULTS ?

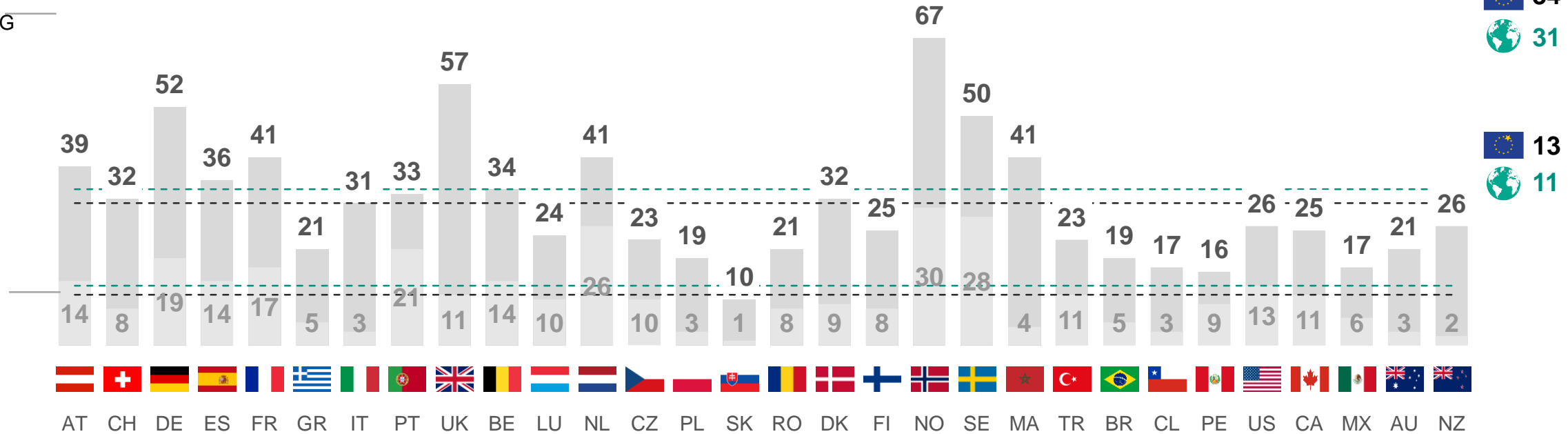
In Belgium, 34% of the companies are already using or consider to implement at least one alternative technology in the next 3 years. 14% of the companies is currently using at least one



ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS



ALREADY USING



Amongst the following alternative fuel technologies, which ones do you currently use...?
 Amongst the following alternative fuel technologies, which ones are you considering using...?
 Basis: companies with LCVs

CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

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

In %



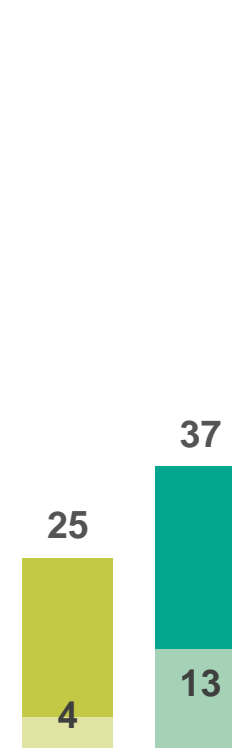
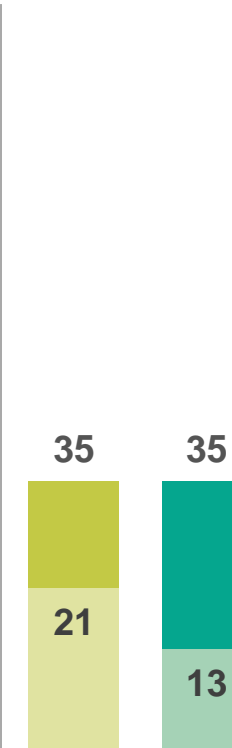
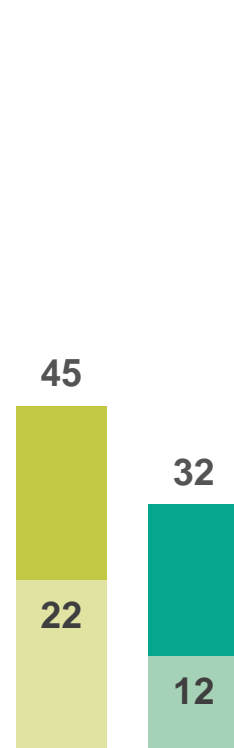
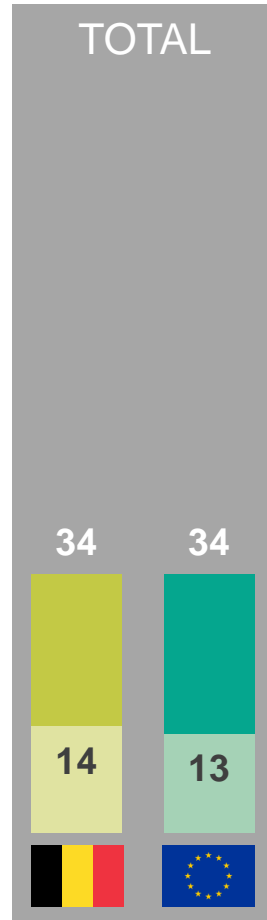
LCVs



ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS



ALREADY USING



ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY*

LCV Fleet

In %



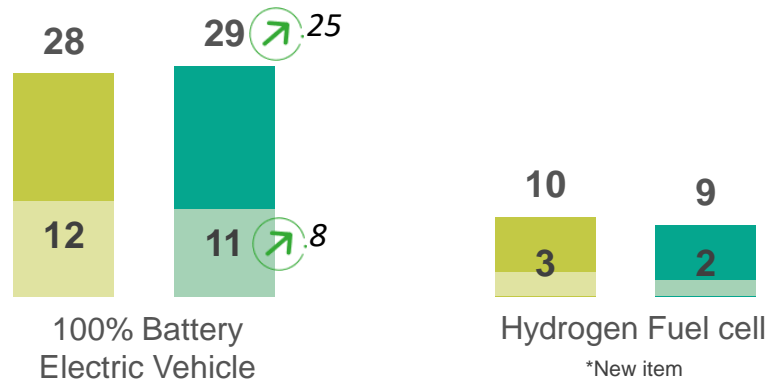
LCVs



ALREADY USING
OR CONSIDER
USING IN THE
NEXT 3 YEARS



ALREADY
IMPLEMENTED



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

Basis: companies with LCVs

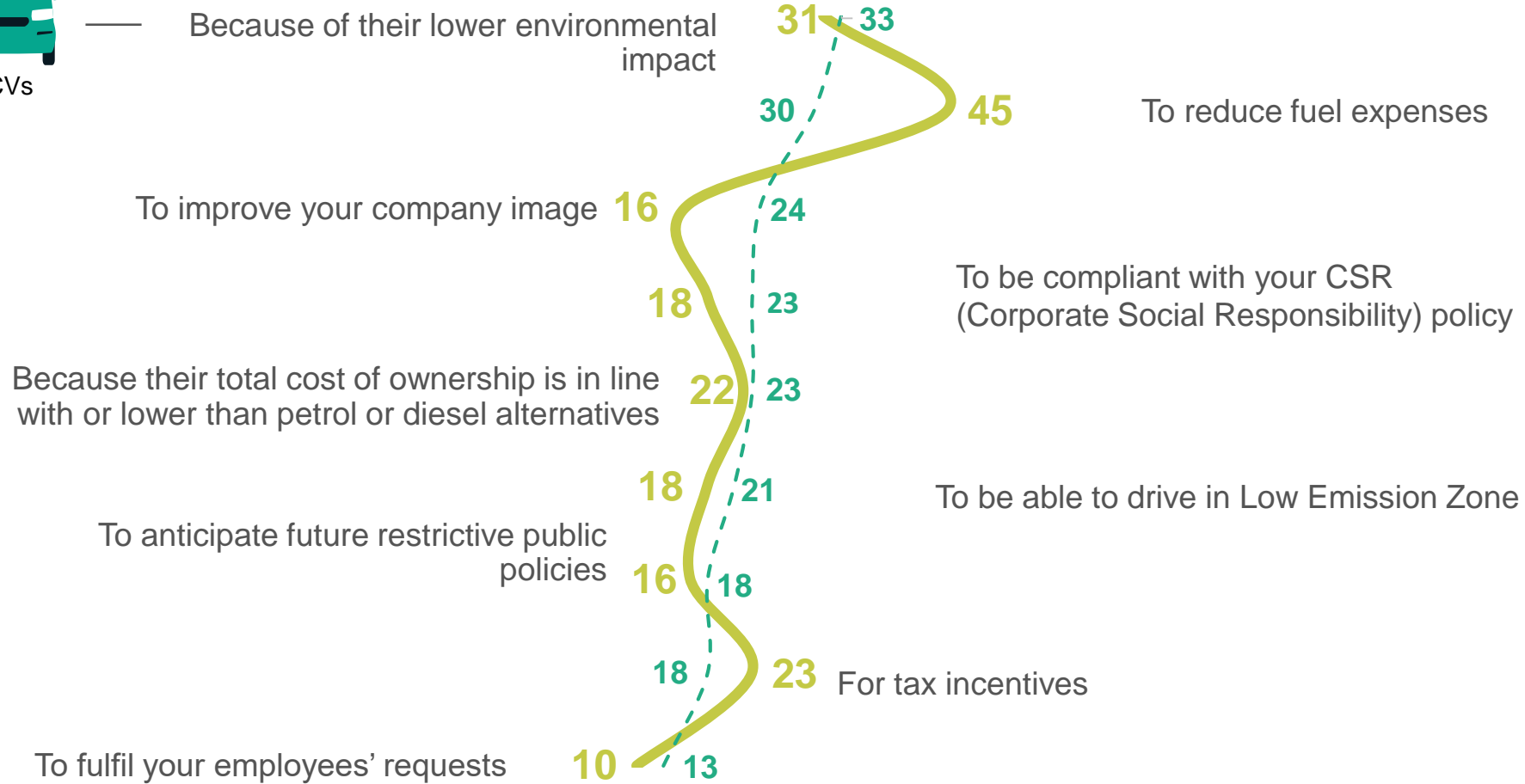
REASONS FOR IMPLEMENTING OR CONSIDERING ALTERNATIVE FUEL TECHNOLOGIES

LCV fleet

In %



LCVs



Why have you already implemented or why do you consider implementing alternative fuel technologies?
 Basis: companies having implemented or considering 100% Battery Electric Vehicle for LCVs

EXPECTED FLEET SHARE PER ENERGY

HOW TO READ THE RESULTS ?

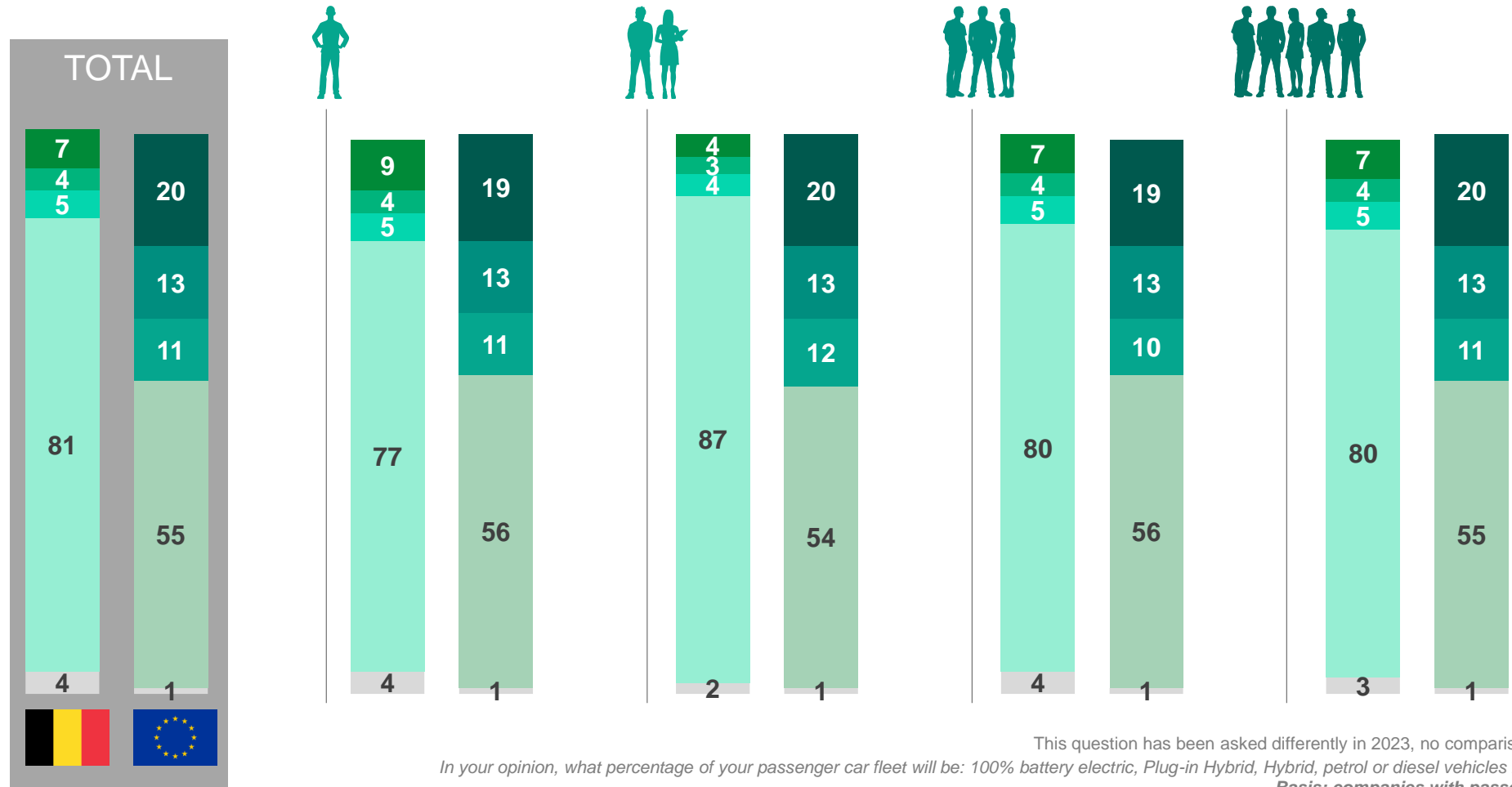
In Belgium in 3 years, 7% of the companies passenger car fleet will be 100% BEV.

In %



Passenger cars

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



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

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

EXPECTED FLEET SHARE PER ENERGY

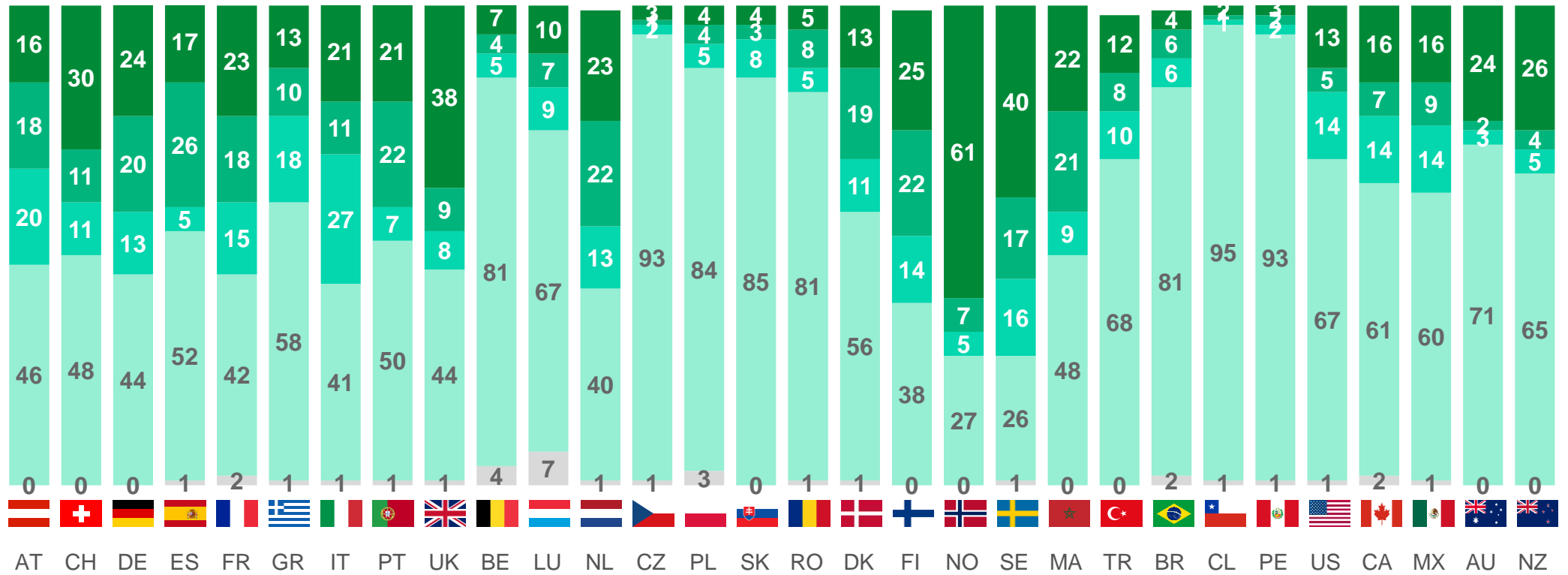
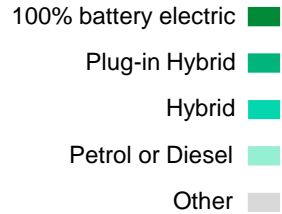
HOW TO READ THE RESULTS ?

In Belgium in 3 years, 7% of the companies passenger car fleet will be 100% BEV.

In %



Passenger cars



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

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

Basis: companies with passenger cars

EXPECTED FLEET SHARE PER ENERGY

In %

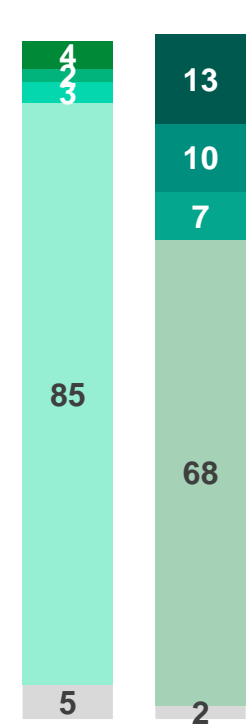
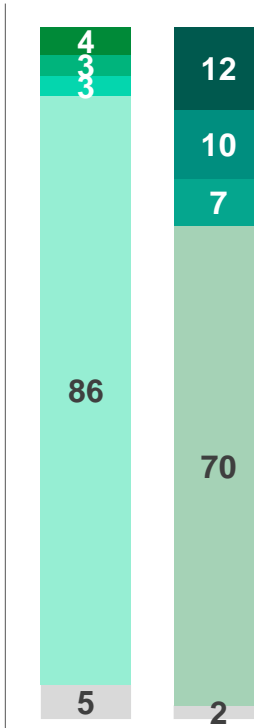
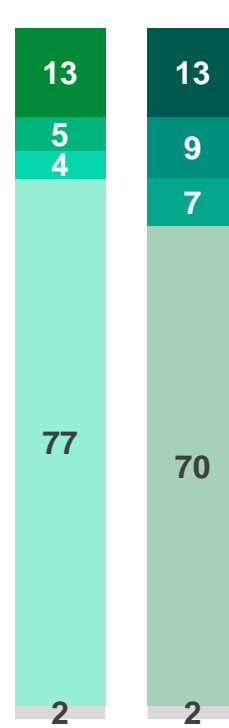
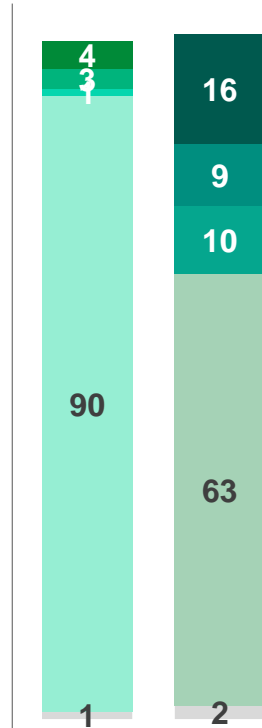
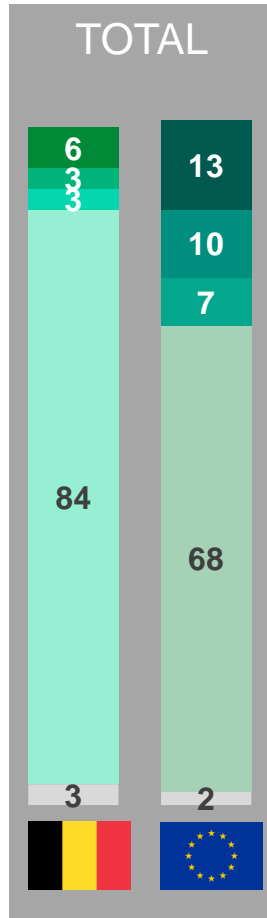


LCVs

HOW TO READ THE RESULTS ?

In Belgium in 3 years, 6% of the light commercial vehicle fleet will be 100% BEV.

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



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

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

EXPECTED FLEET SHARE PER ENERGY

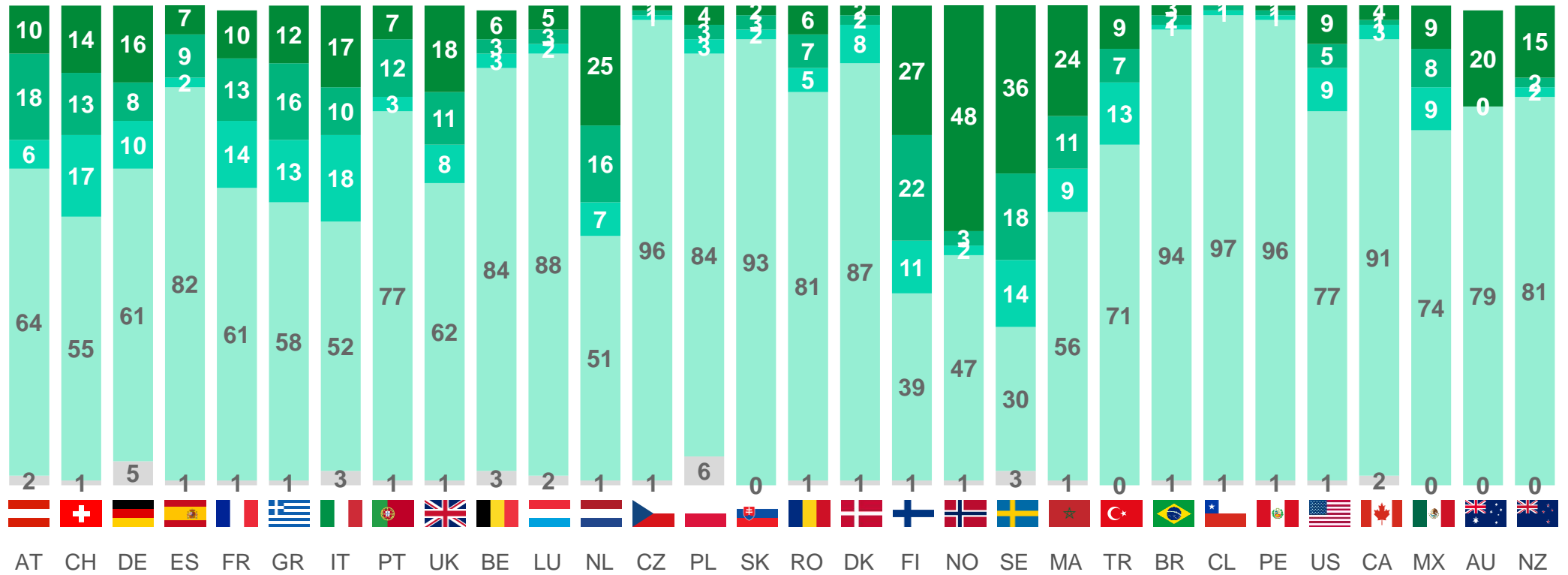
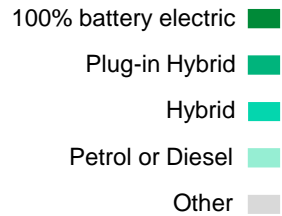
HOW TO READ THE RESULTS ?

In Belgium in 3 years, 6% of the light commercial vehicle fleet is expected to be 100% BEV.

In %



LCVs



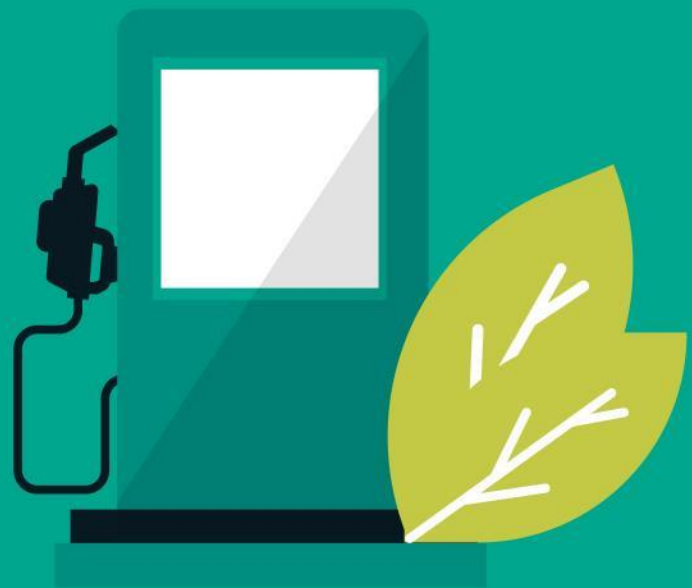
This question has been asked differently in 2023, no comparison vs 2022

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

Basis: companies with LCVs

5

ENERGY MIX FOCUS PER ALTERNATIVE TECHNOLOGY



HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %



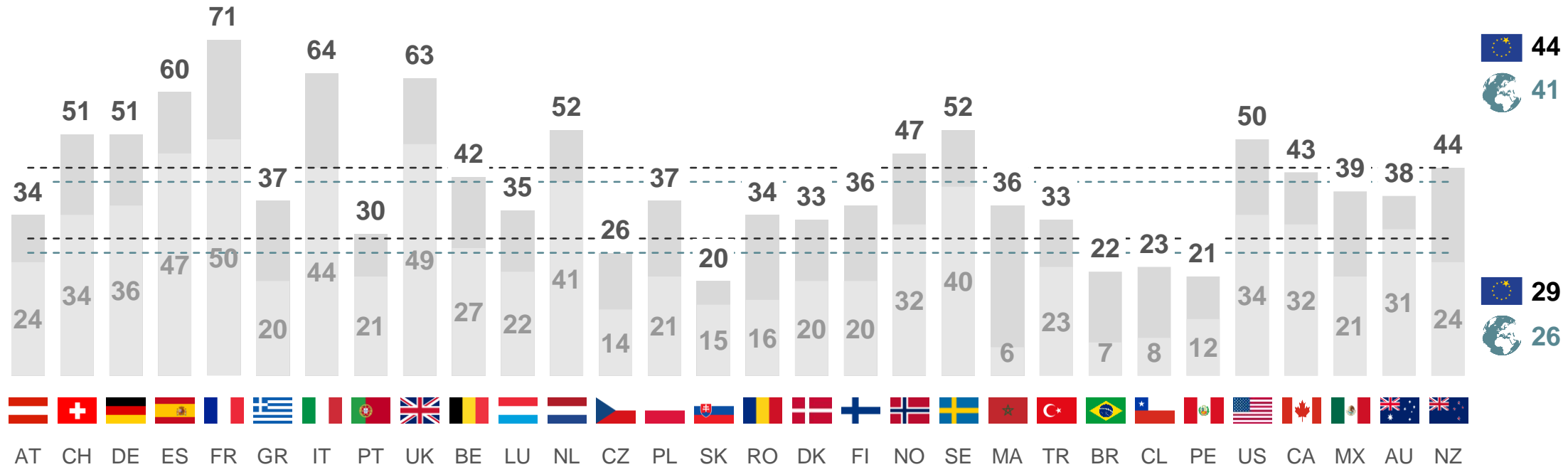
Passenger cars



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



EU 44

World 41

EU 29

World 26

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

Basis: companies with passenger cars

HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %



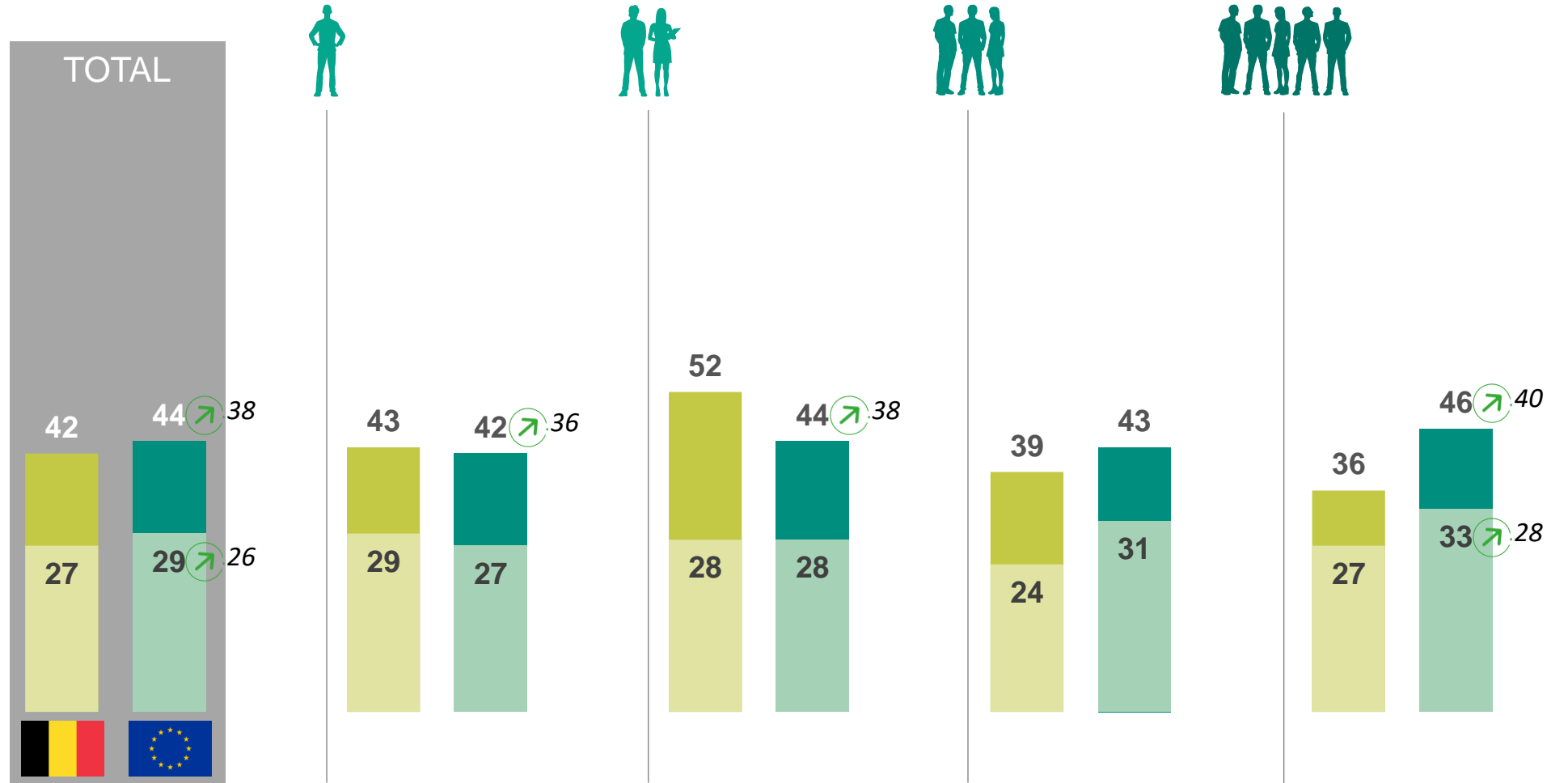
Passenger cars



ALREADY USING
OR CONSIDER
USING IN THE
NEXT 3 YEARS



ALREADY
USING



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

Basis: companies with passenger cars

PLUG-IN HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %



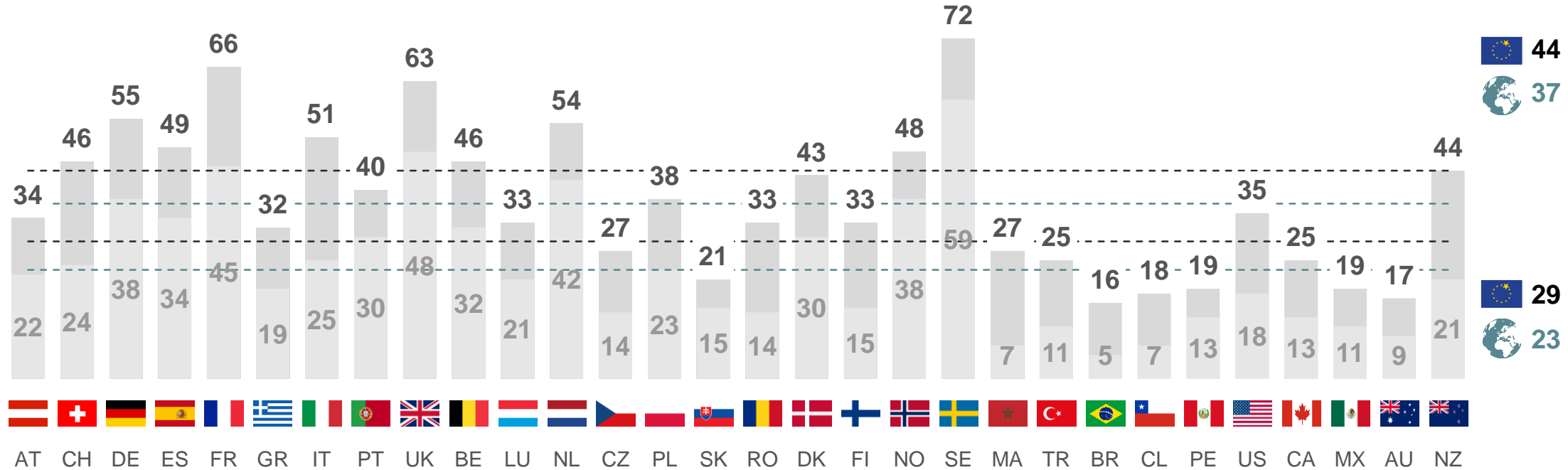
Passenger cars



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



EU 44

World 37

EU 29

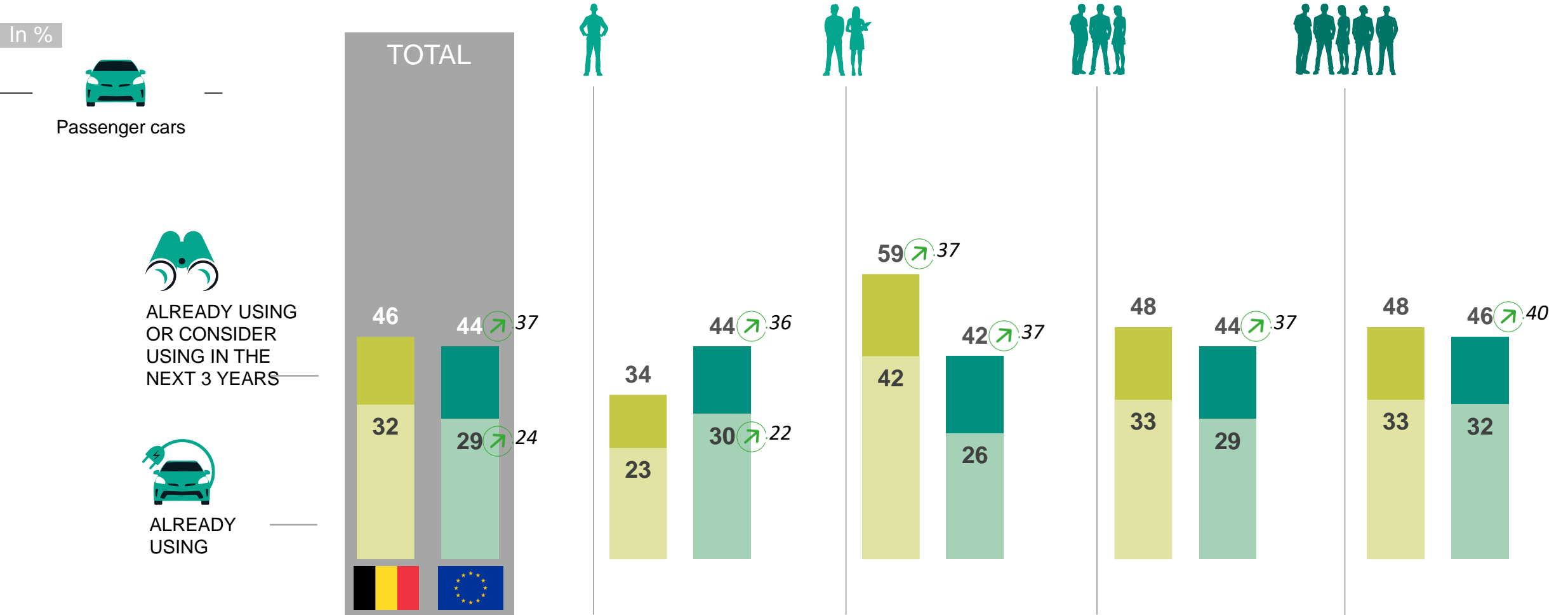
World 23

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

Basis: companies with passenger cars

75

PLUG-IN HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY



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

Basis: companies with passenger cars

100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %



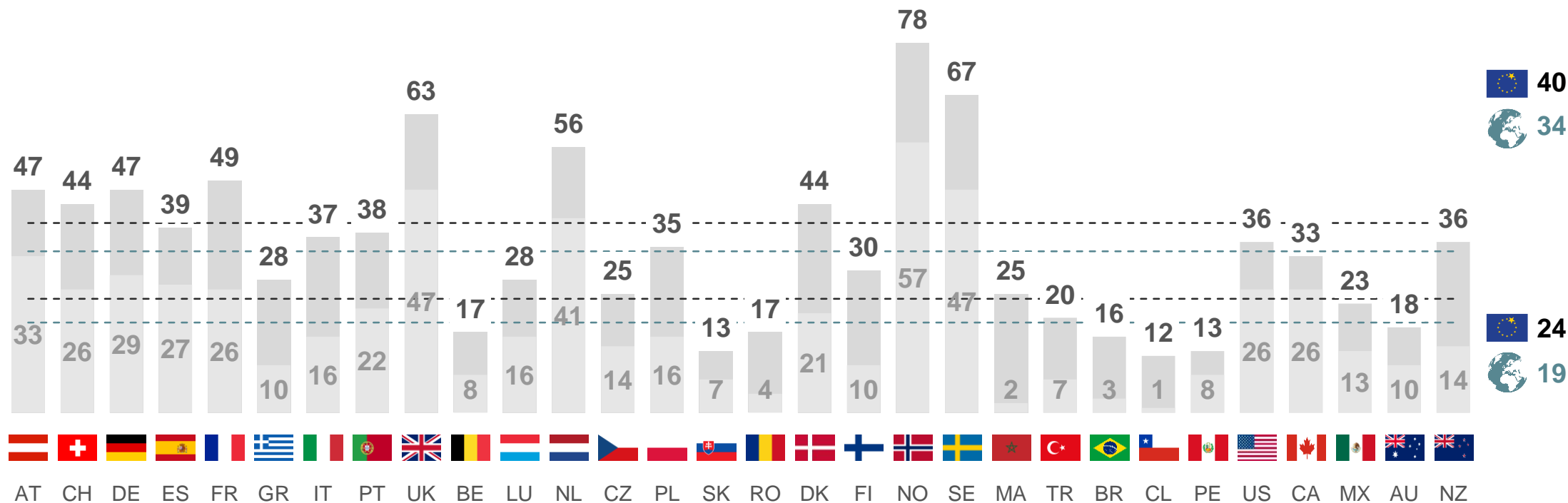
Passenger cars



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



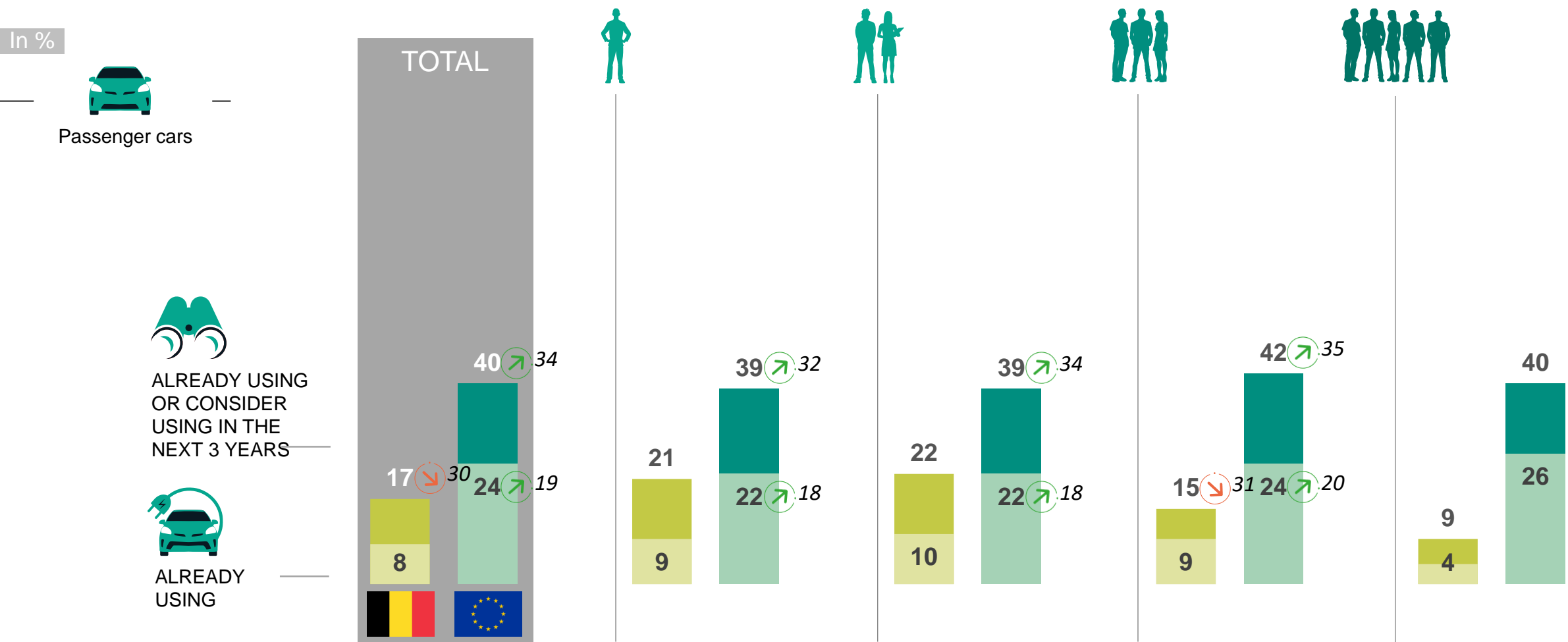
EU 40

World 34

EU 24

World 19

100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY



Amongst the following alternative fuel technologies, which ones do you currently use...?
 Amongst the following alternative fuel technologies, which ones are you considering using...?
Basis: companies with passenger cars

100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %



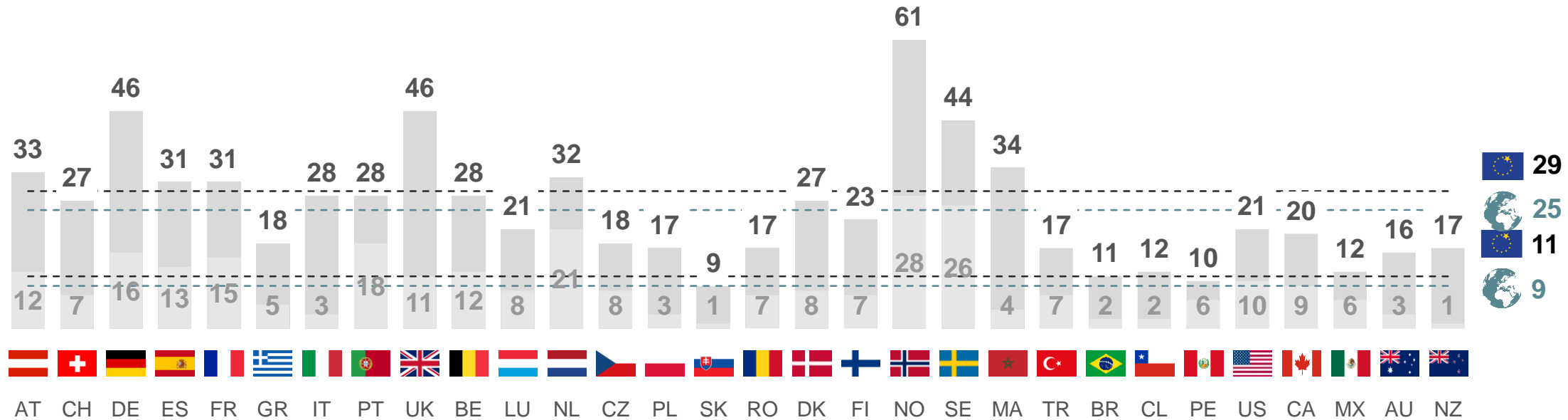
LCVs



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



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

Basis: companies with LCVs

79

100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %



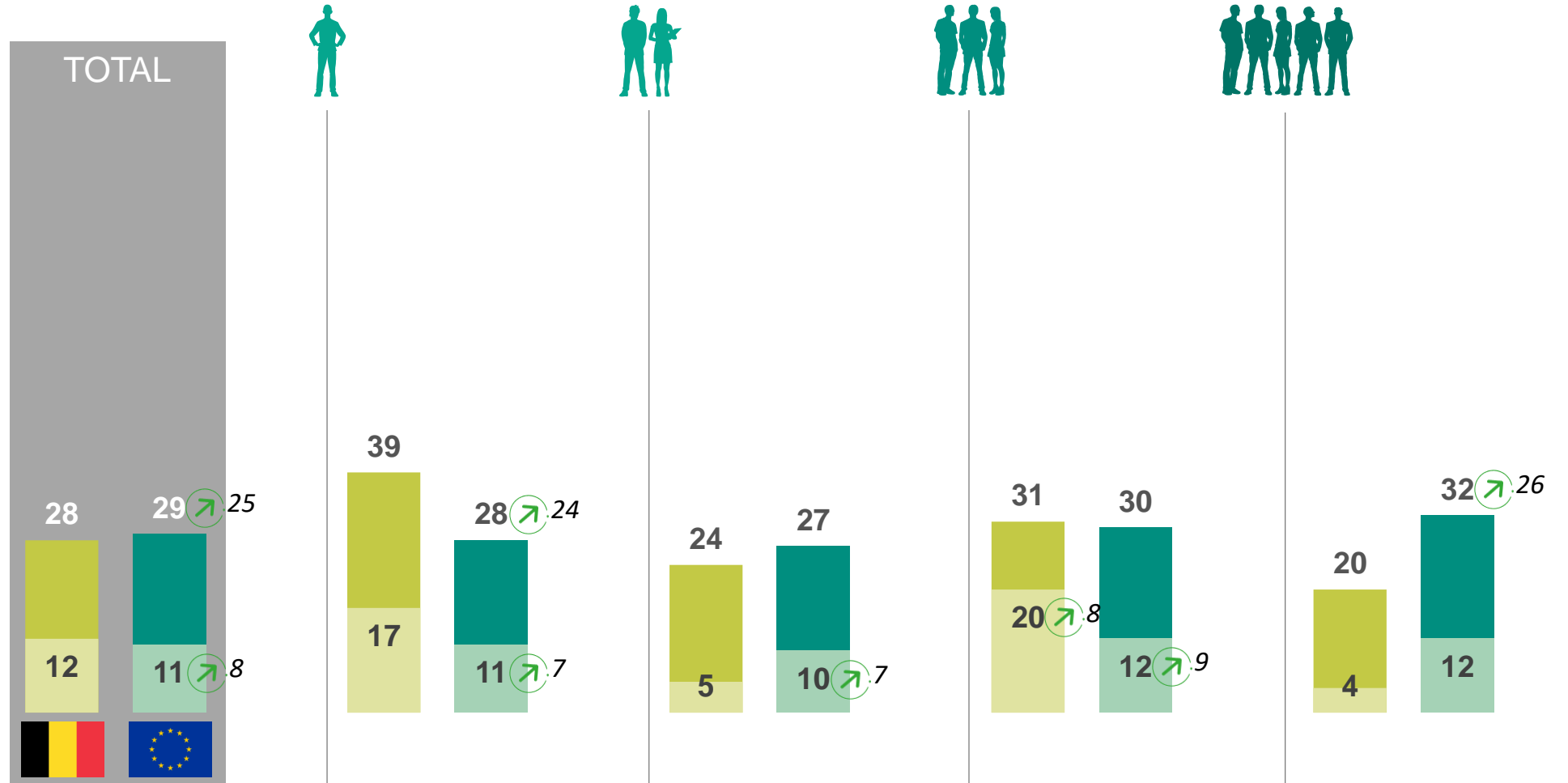
LCVs



ALREADY USING
OR CONSIDER
USING IN THE
NEXT 3 YEARS



ALREADY
USING



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

Basis: companies with LCVs

HYDROGEN FUEL CELL ELECTRIC VEHICLE : IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %



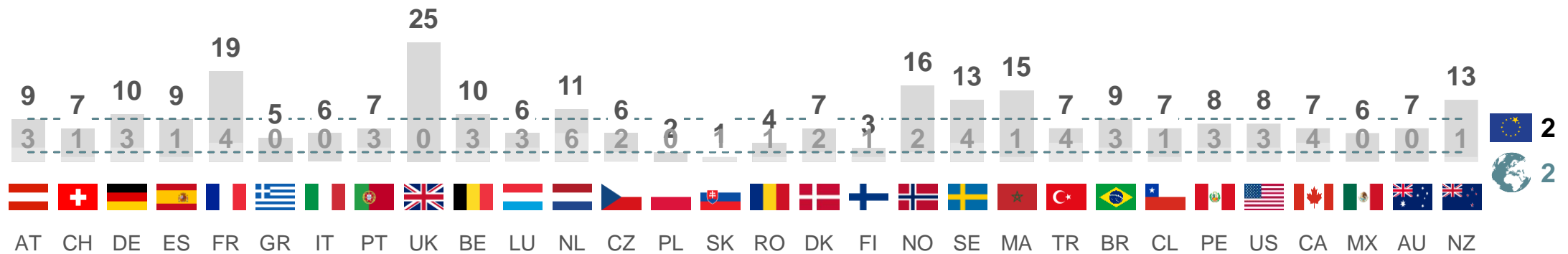
LCVs



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



9

9

2

2

New item added in 2023

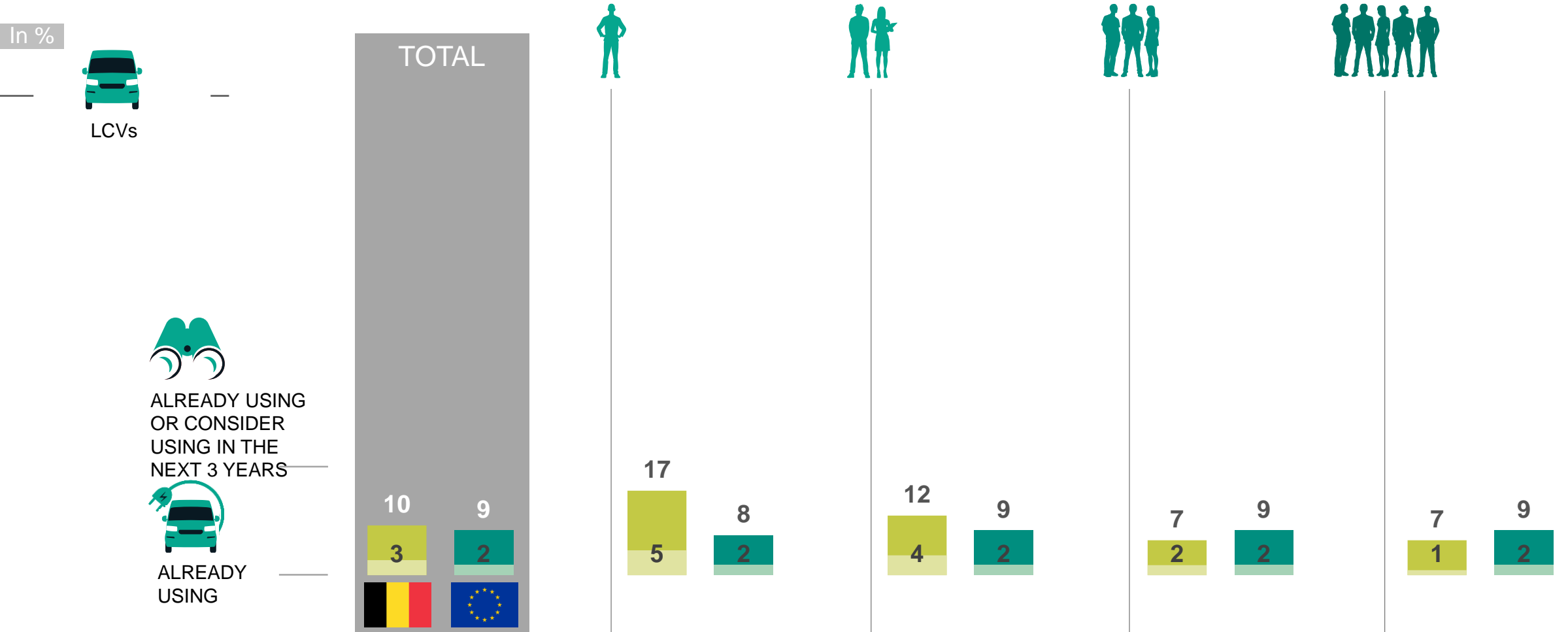
Amongst the following alternative fuel technologies, which ones do you currently use...?

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

Basis: companies with LCVs

81

HYDROGEN FUEL CELL ELECTRIC VEHICLE : IMPLEMENTATION WITHIN COMPANY FLEET POLICY



New item added in 2023

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

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

Basis: companies with LCVs

82

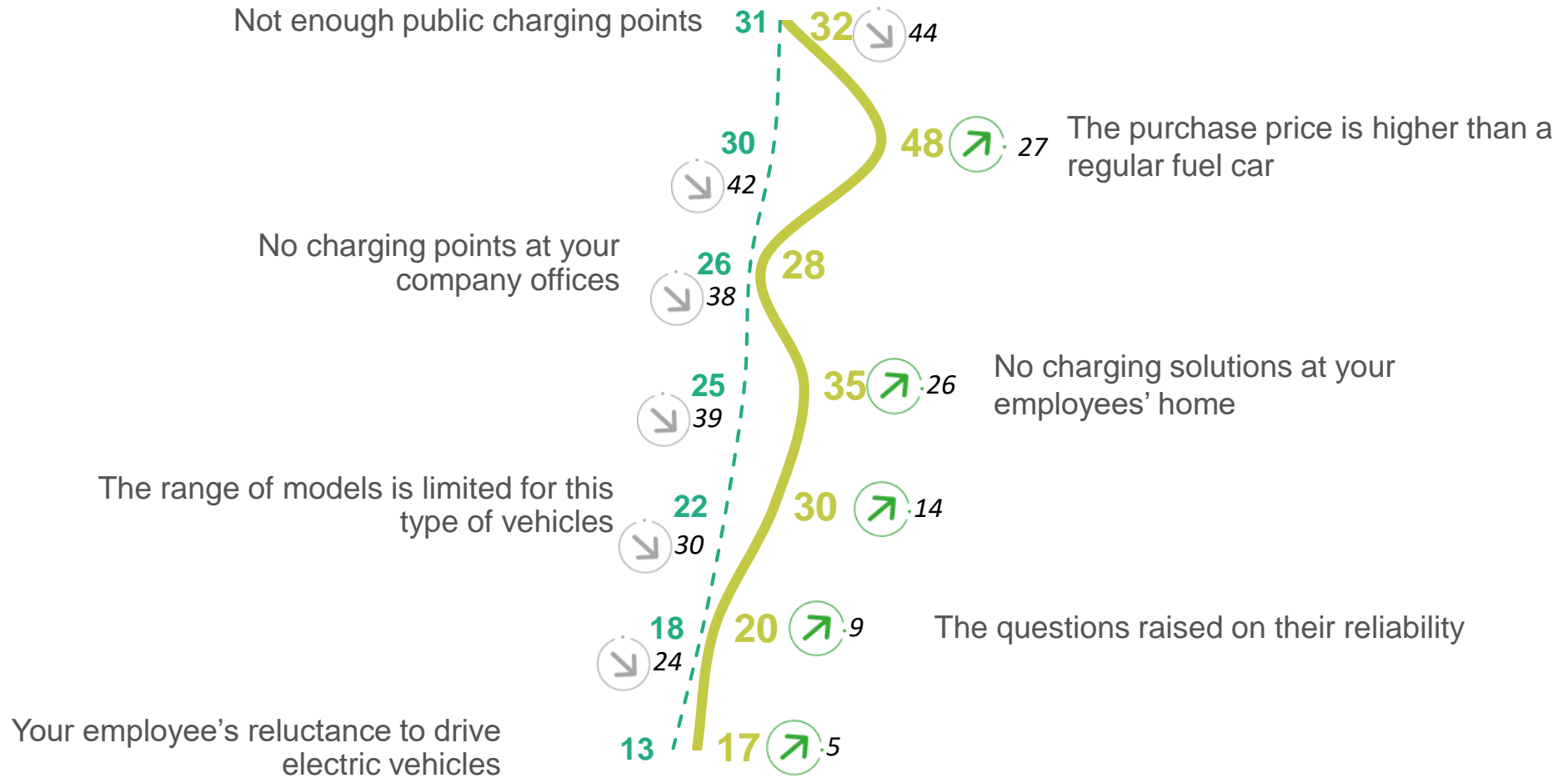
Classification : Internal

CONSTRAINTS OF 100% BATTERY ELECTRIC VEHICLE USAGE

In %



Passenger cars + LCVs



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

COMPANY'S STRATEGY TOWARDS PROVIDING CHARGING POINTS

Among companies that already own or consider 100% Battery Electric Vehicle

In %



Passenger cars + LCVs

Consider to set up charging points in your company

67

Consider to assist your employees in the implementation of recharging solutions in their homes

42

TOTAL



62

48



74

35



66

37



69

51

Concerning the charging of your Electric Vehicles batteries, do you consider....
Basis: already own or consider 100% Battery Electric Vehicle

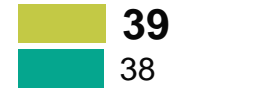
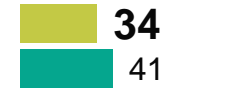
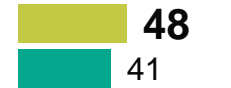
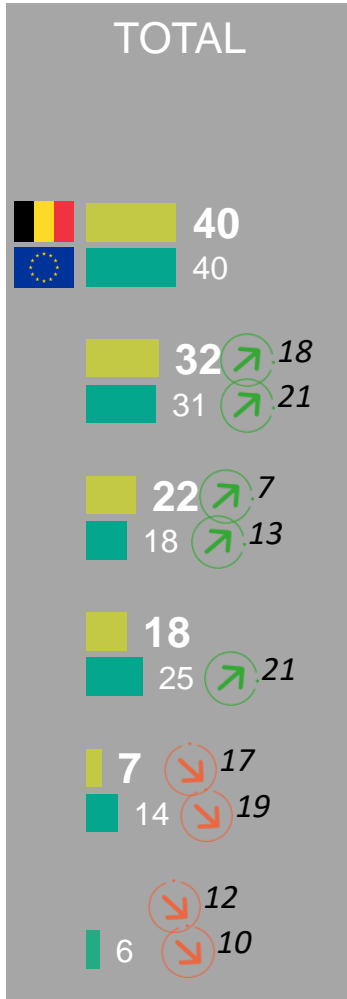
ACCESS TO CHARGING POINTS

In %



Passenger cars + LCVs

Currently no charging points installed at the company premises



Multiple answers - % don't add up to 100%

In terms of charging point installation and responsibility for the cost of charging for battery electric and plug-in hybrid vehicles in your company...?

Basis: companies already using or considering BEV/PHEV for passenger cars or BEV for LCV

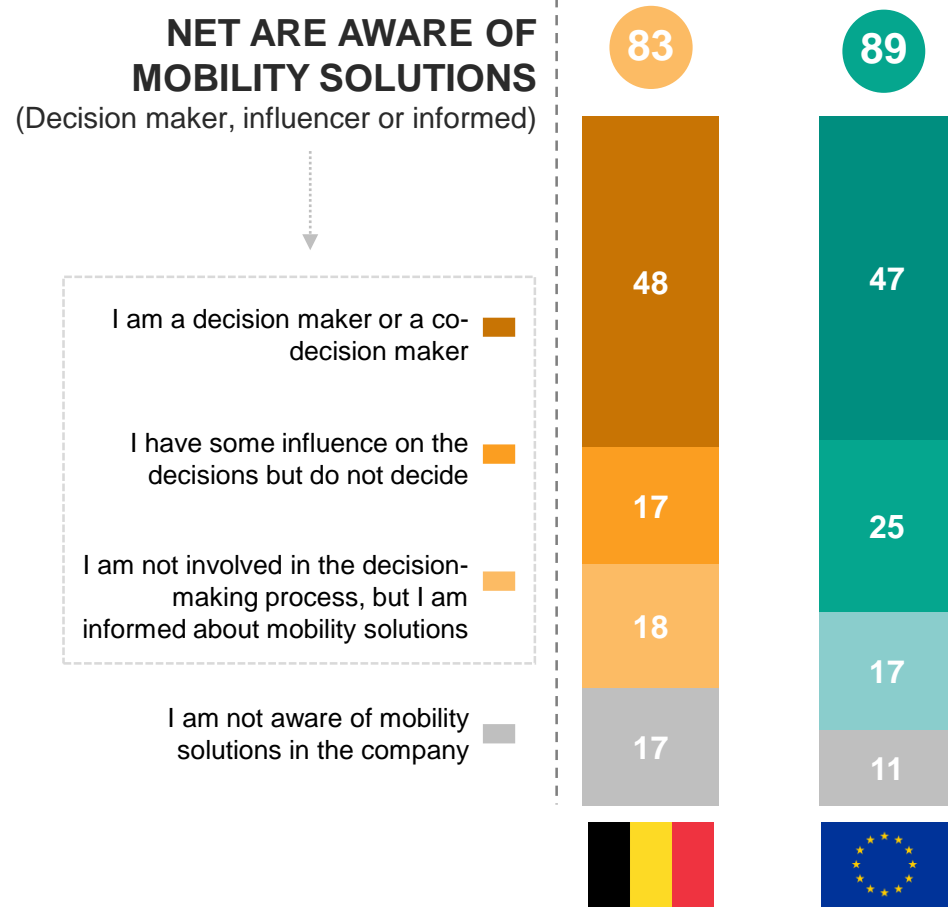
6

WHAT ARE THE PERSPECTIVES IN TERMS OF MOBILITY SOLUTIONS?

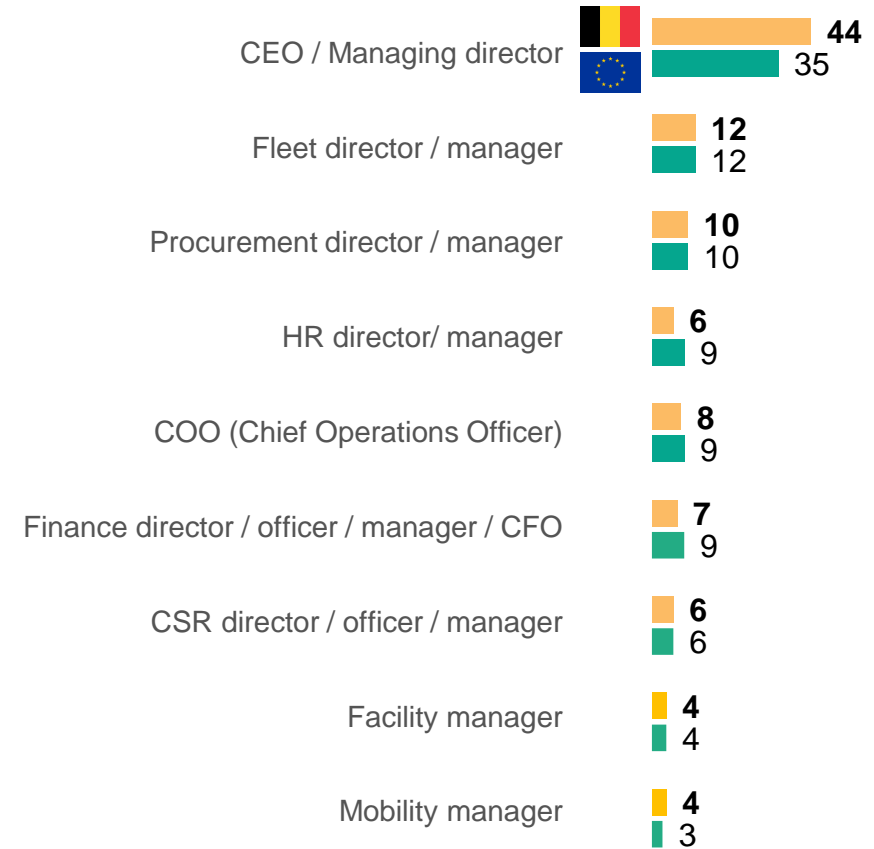


MOBILITY SOLUTION DECISION MAKERS

RESPONDENTS INVOLVEMENT IN MOBILITY SOLUTION DECISIONS

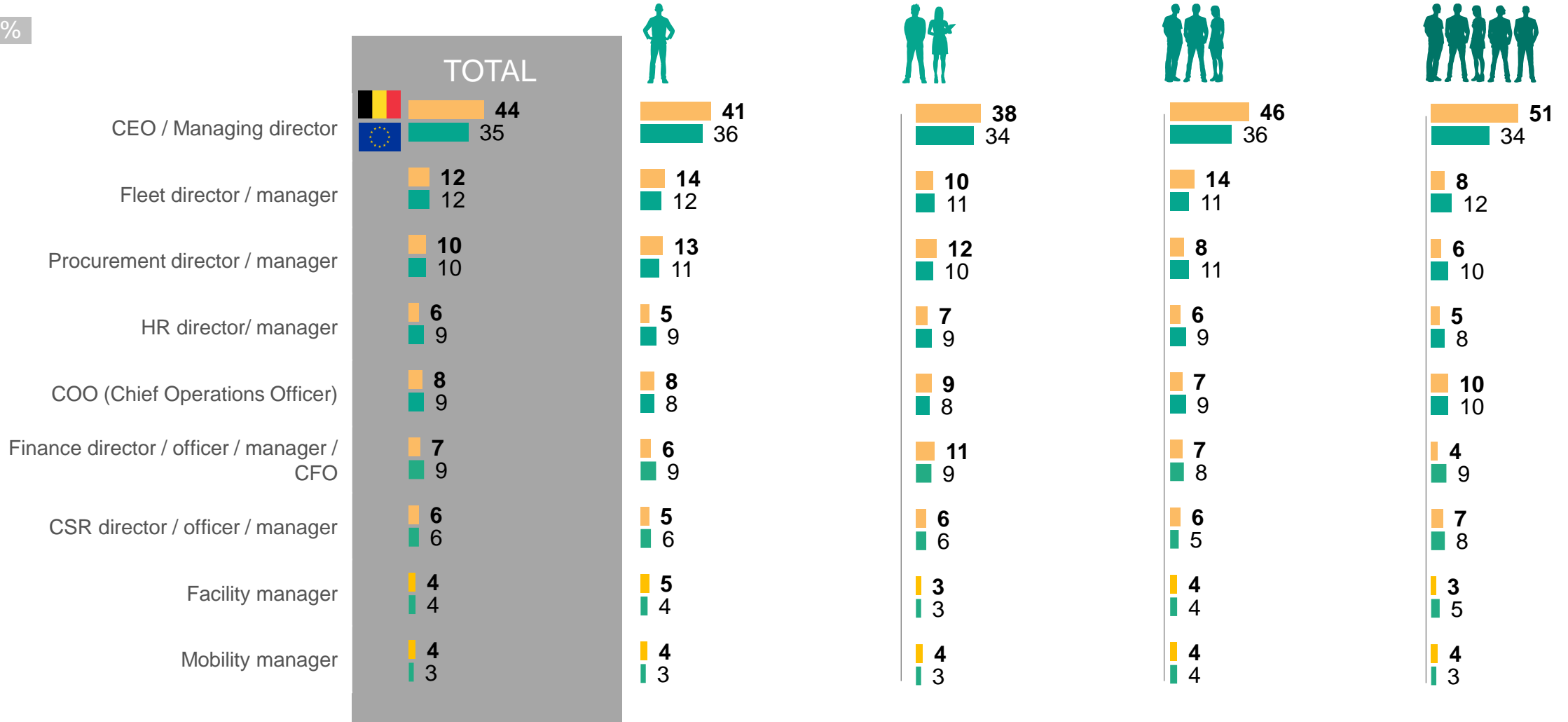


POSITION OF THE PERSON WHO DECIDES ON MOBILITY SOLUTIONS



POSITION OF THE PERSON WHO DECIDES ON MOBILITY SOLUTIONS

In %



New question added in 2023

What is the position of the person who decides on mobility solutions in your company??

Basis: companies with corporate vehicles = 100%

MOBILITY SOLUTIONS LIST AND DEFINITIONS



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



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



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



AN APP TO BOOK MOBILITY SOLUTIONS PROVIDED BY THE COMPANY



BIKE (OR OTHER TWO WHEELS) SHARING / BIKE (OR OTHER TWO WHEELS) LEASING solution provided by the company



PRIVATE LEASE OR SALARY SACRIFICE (private lease where an employee leases a car on his own behalf / salary sacrifice where an employee leases a car via their employer)



PUBLIC TRANSPORT



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



CAR OR CASH ALLOWANCE *New item

MOBILITY SOLUTIONS IMPLEMENTATION

At least one already implemented

List of the alternative mobility solutions:

- CORPORATE CAR SHARING
- RIDE SHARING
- BIKE SHARING / BIKE LEASING
- PUBLIC TRANSPORT
- MOBILITY BUDGET
- AN APP TO BOOK MOBILITY SOLUTIONS PROVIDED BY THE COMPANY
- PRIVATE LEASE OR SALARY SACRIFICE
- A SHORT OR MID TERM RENTAL VEHICLE
- CAR OR CASH ALLOWANCE

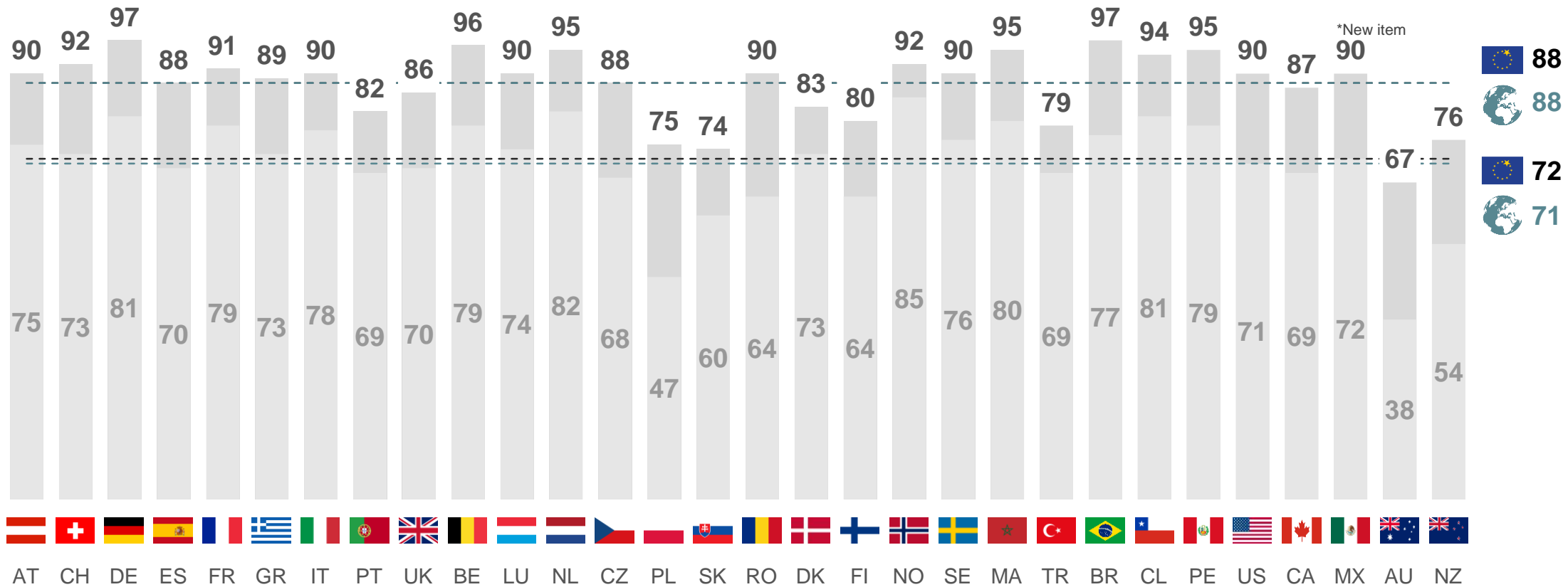
In %



ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS



ALREADY USING



Which of the following have you implemented, or will you implement in the next 3 years?
 Response scale: Already using, considered in the next 3 years, not interested
 Basis: companies with corporate vehicles = 100%
 Question asked to respondents that are aware of mobility solutions

MOBILITY SOLUTIONS IMPLEMENTATION

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

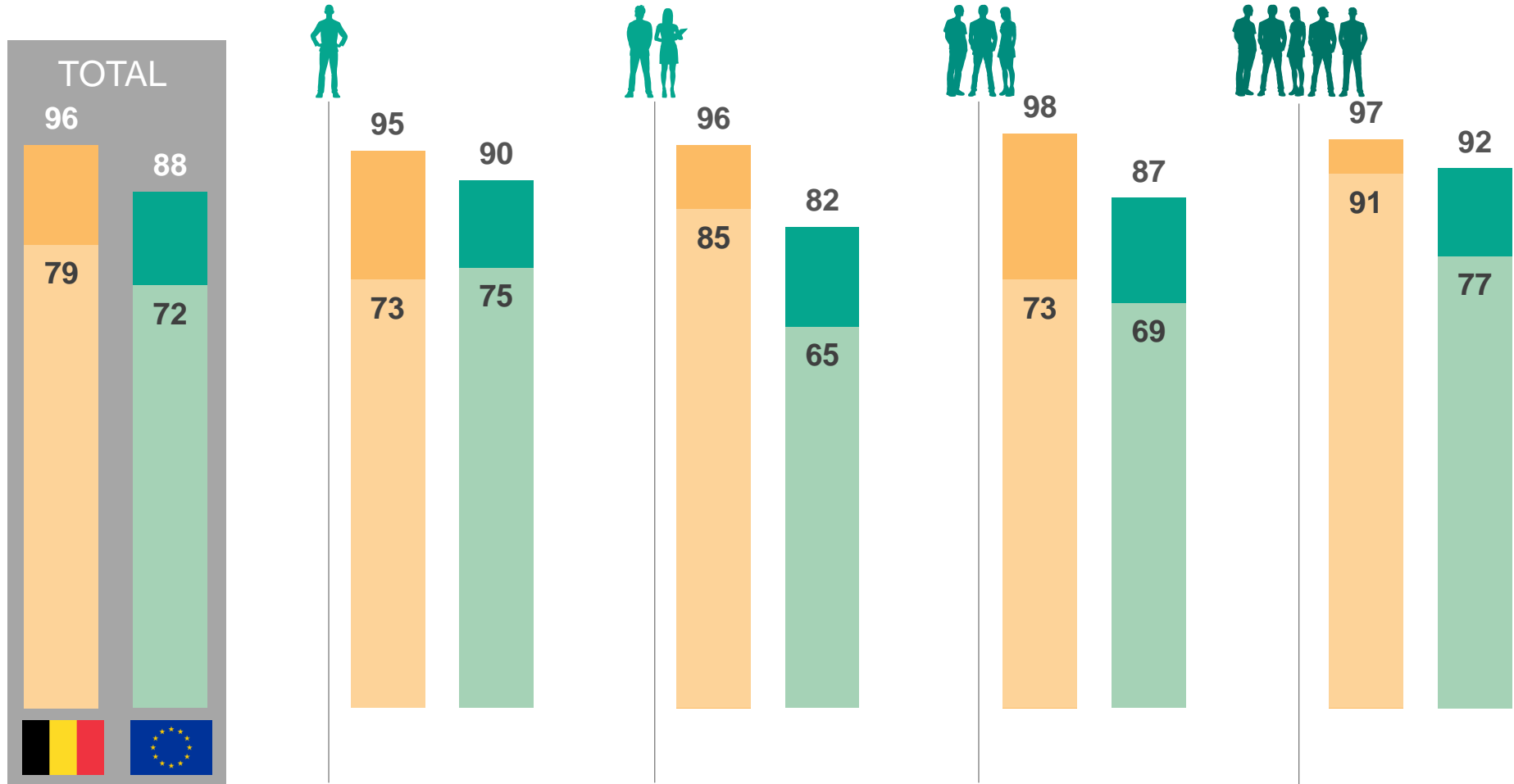
In %



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



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

Question asked to respondents that are aware of mobility solutions

OVERVIEW OF MOBILITY SOLUTIONS IMPLEMENTATION

In %

79%

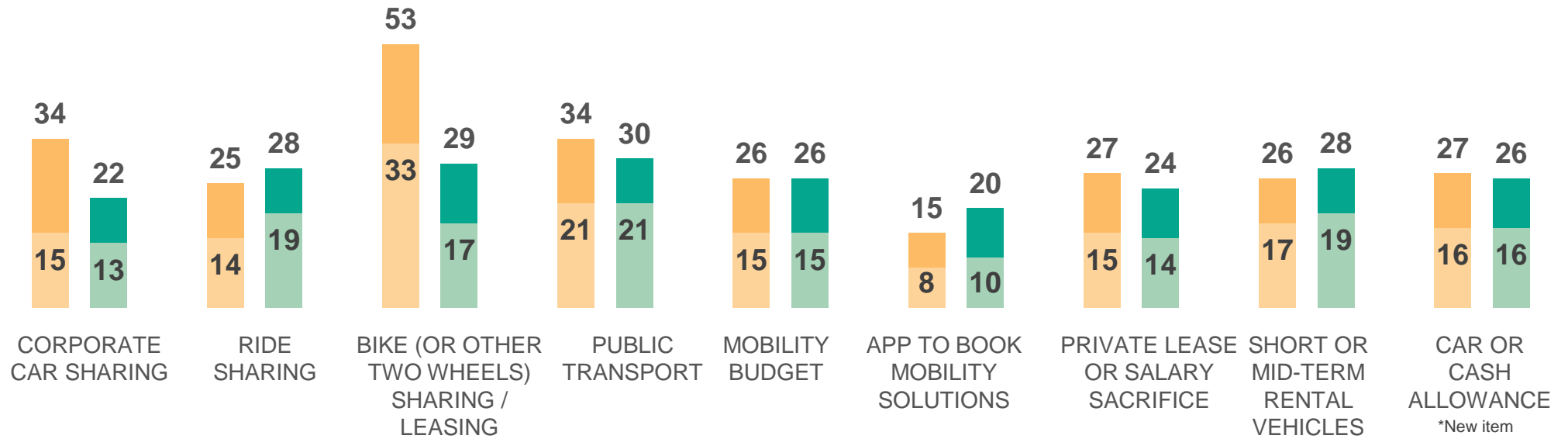
Of companies have already implemented at least one of these solutions



ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS



ALREADY USING



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

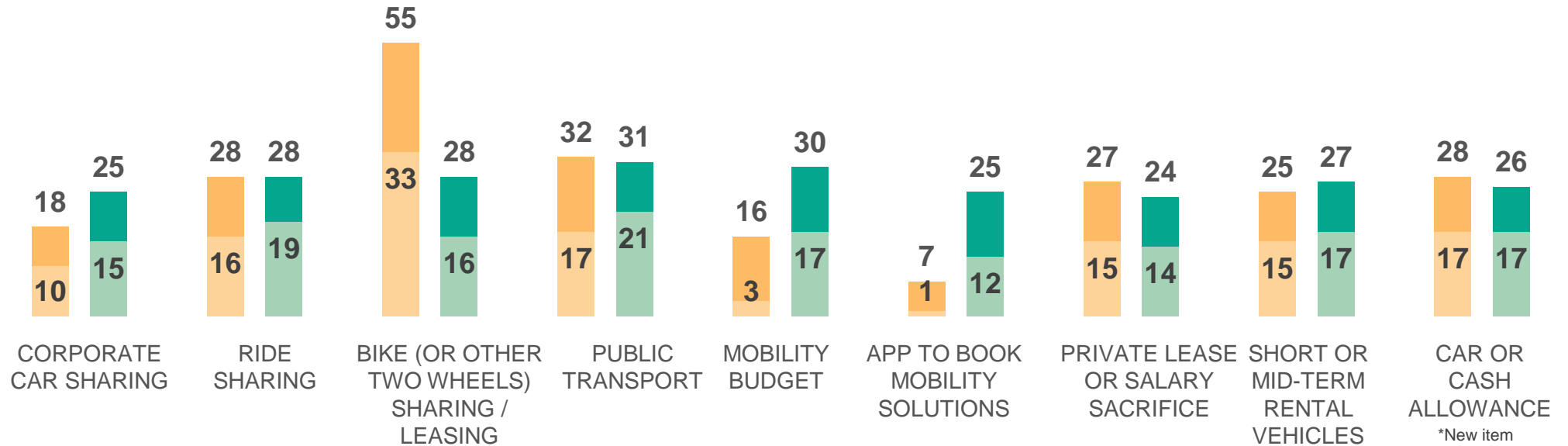
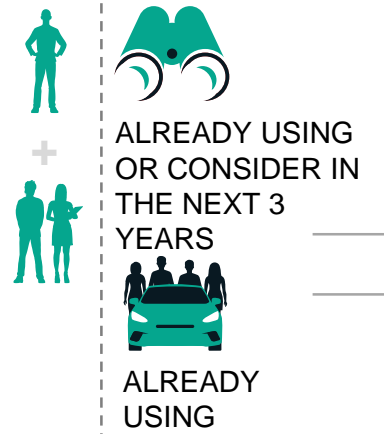
Question asked to respondents that are aware of mobility solutions

OVERVIEW OF MOBILITY SOLUTIONS IMPLEMENTATION

Focus on 1 to 99

77%

Of companies have already implemented at least one of these solutions



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

Question asked to respondents that are aware of mobility solutions

OVERVIEW OF MOBILITY SOLUTIONS IMPLEMENTATION

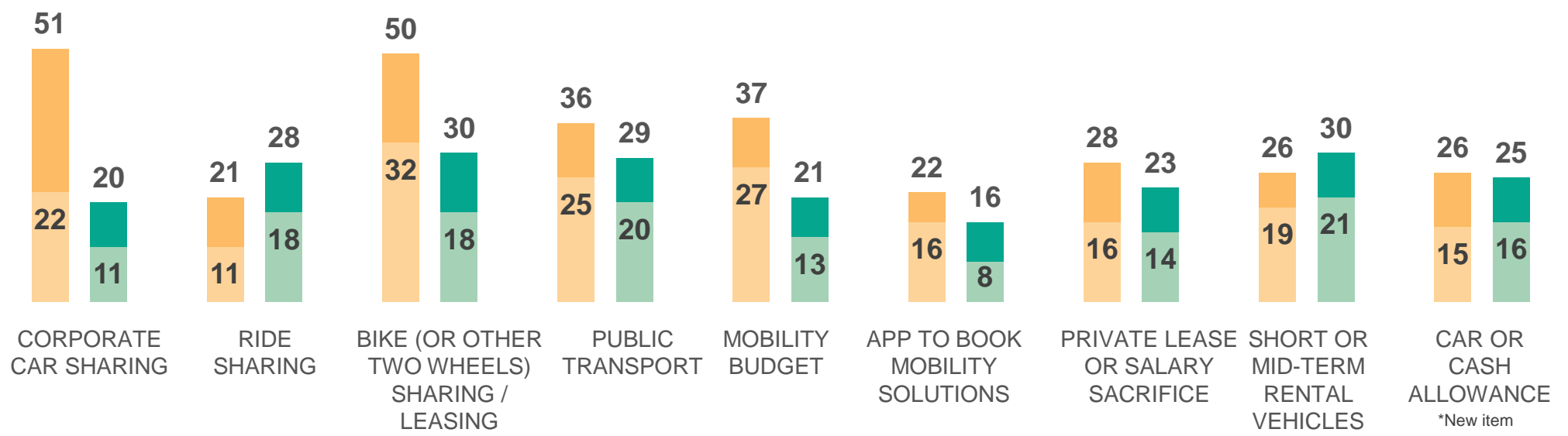
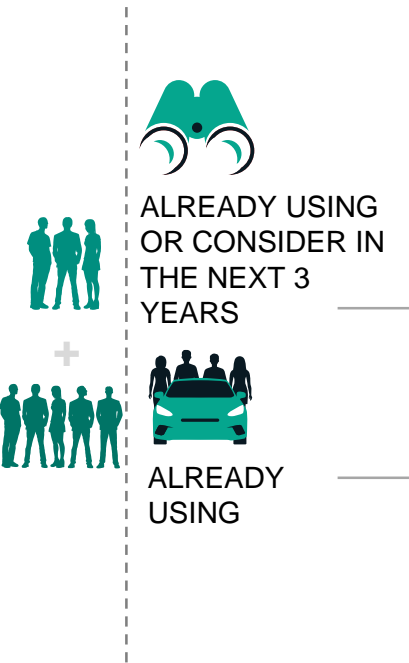
Focus on 100 and more

80%

Of companies have already implemented at least one of these solutions



In %



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

Question asked to respondents that are aware of mobility solutions

CORPORATE CAR SHARING IMPLEMENTATION

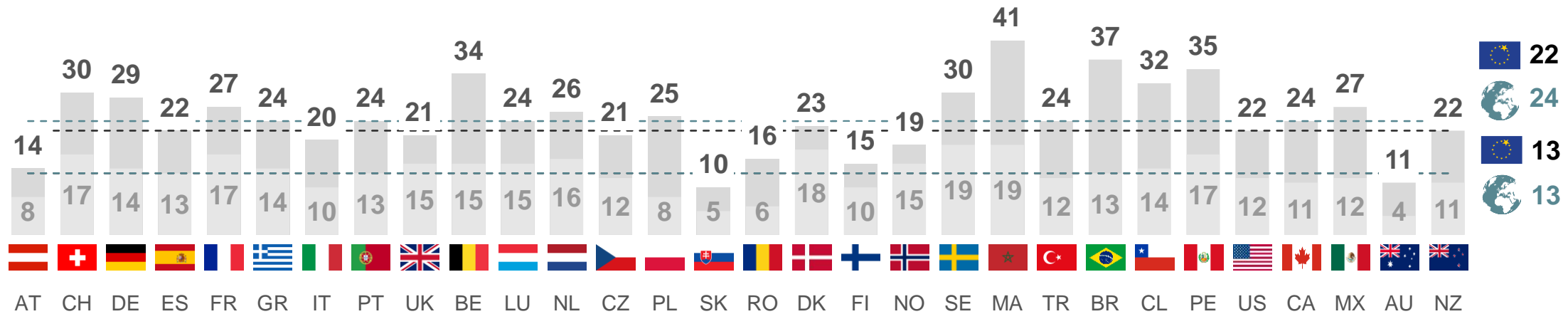
In %



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY USING



Which of the following have you implemented or will you implement in the next 3 years?
 Response scale: Already using, considered in the next 3 years, not interested
 Basis: companies with corporate vehicles = 100%
 Question asked to respondents that are aware of mobility solutions

CORPORATE CAR SHARING IMPLEMENTATION

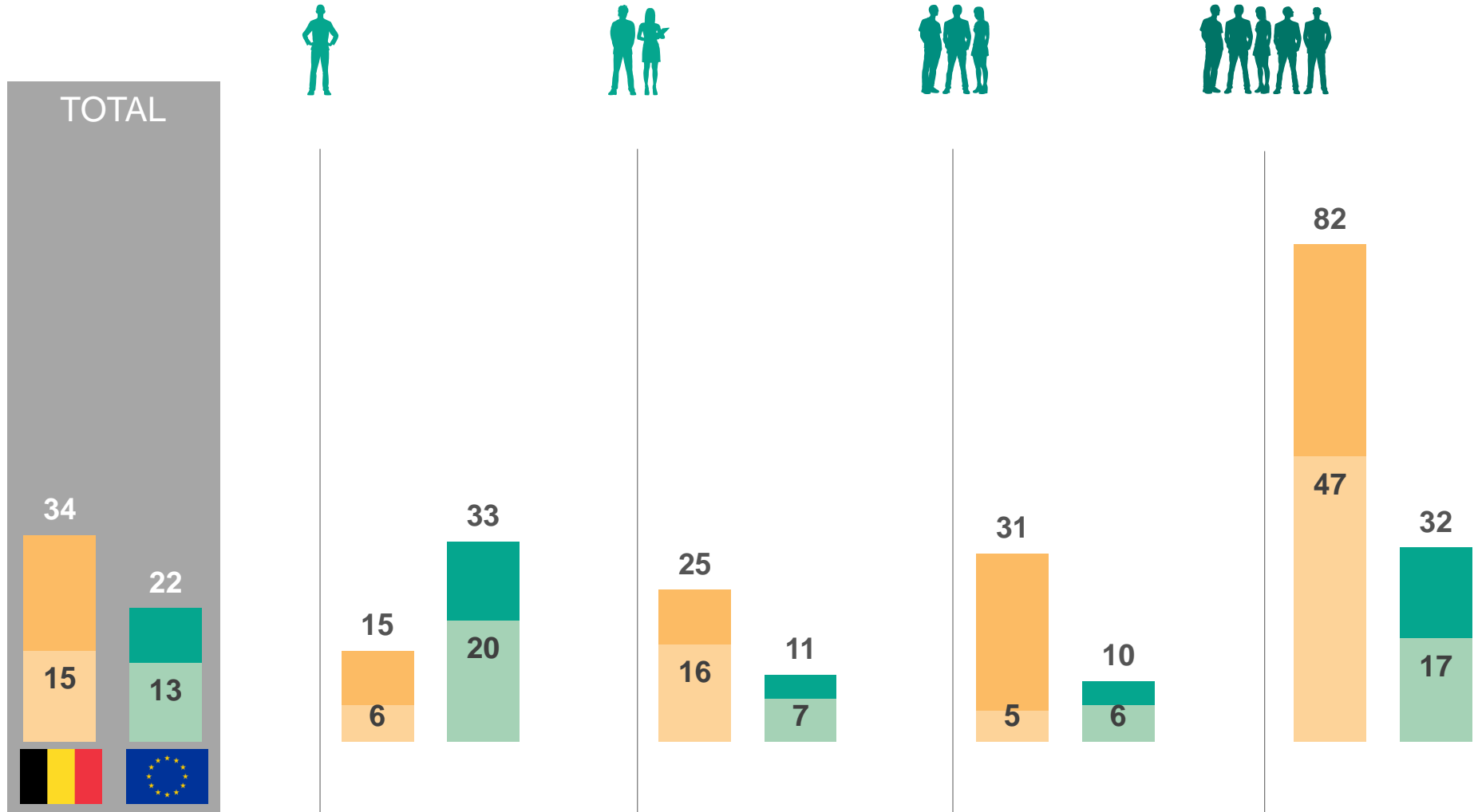
In %



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



Which of the following have you implemented or will you implement in the next 3 years?
 Response scale: Already using, considered in the next 3 years, not interested
 Basis: companies with corporate vehicles = 100%
 Question asked to respondents that are aware of mobility solutions

RIDE SHARING IMPLEMENTATION

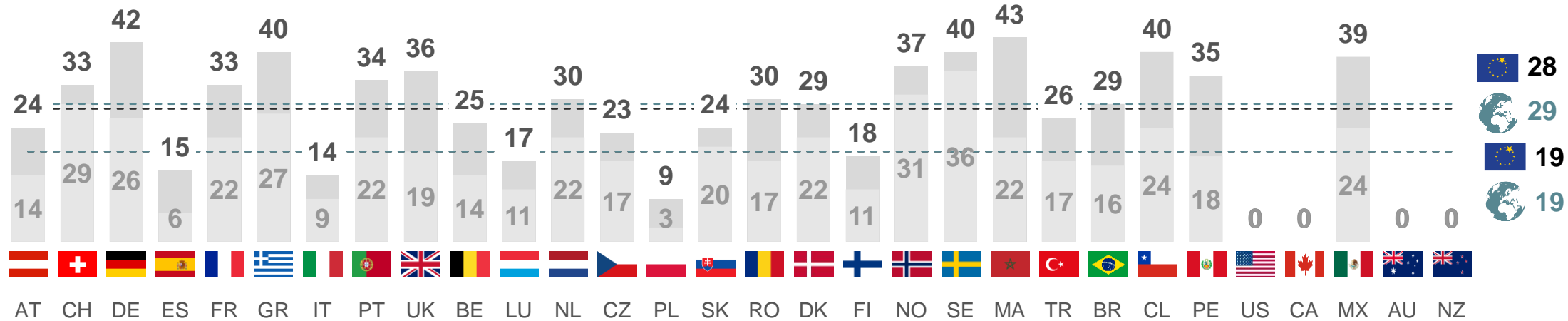
In %



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



Which of the following have you implemented or will you implement in the next 3 years?
 Response scale: Already using, considered in the next 3 years, not interested
 Basis: companies with corporate vehicles = 100%
 Question asked to respondents that are aware of mobility solutions
 98

RIDE SHARING IMPLEMENTATION

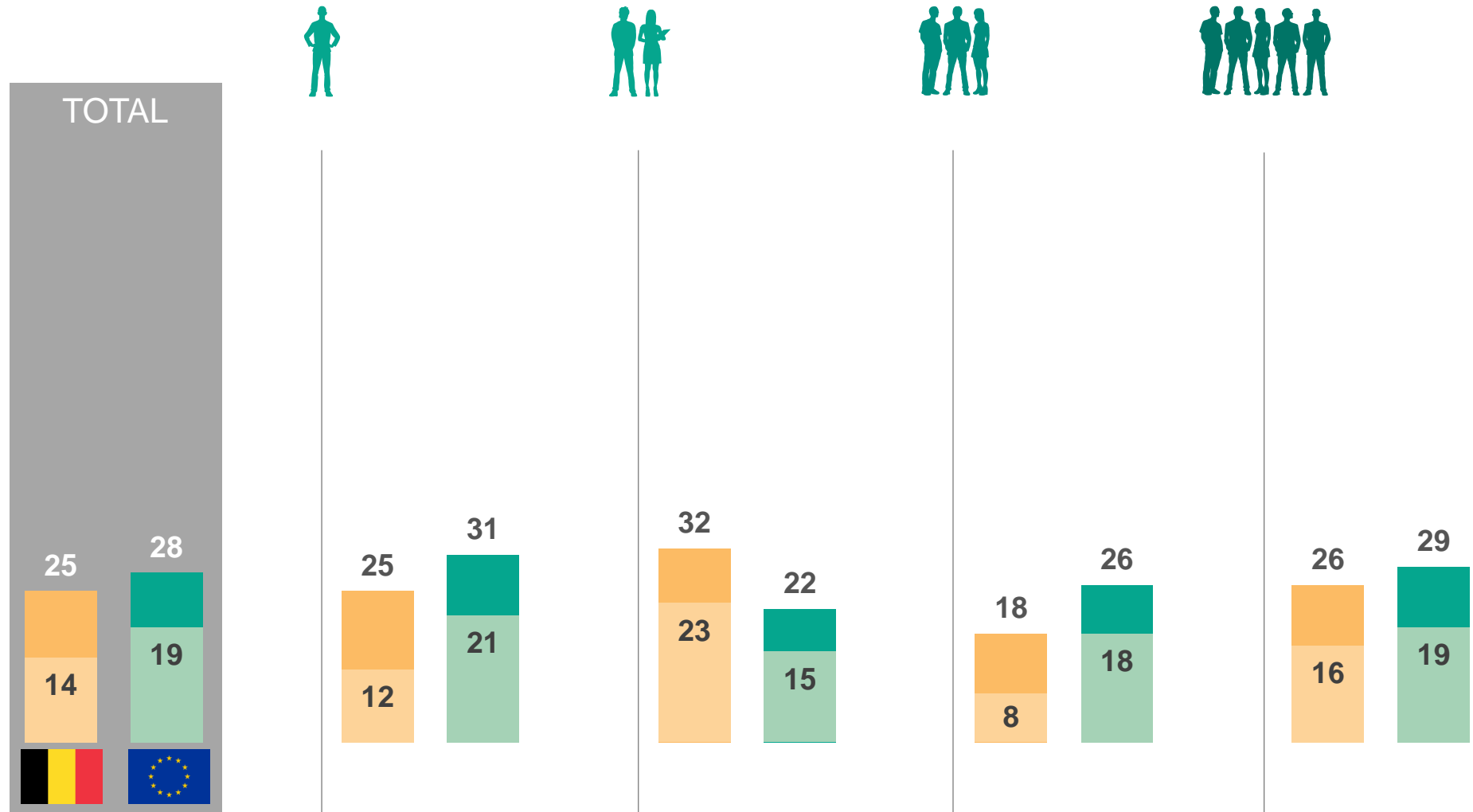
In %



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



Which of the following have you implemented or will you implement in the next 3 years?
 Response scale: Already using, considered in the next 3 years, not interested
 Basis: companies with corporate vehicles = 100%
 Question asked to respondents that are aware of mobility solutions

BIKE (OR OTHER TWO WHEELS) SHARING / LEASING IMPLEMENTATION

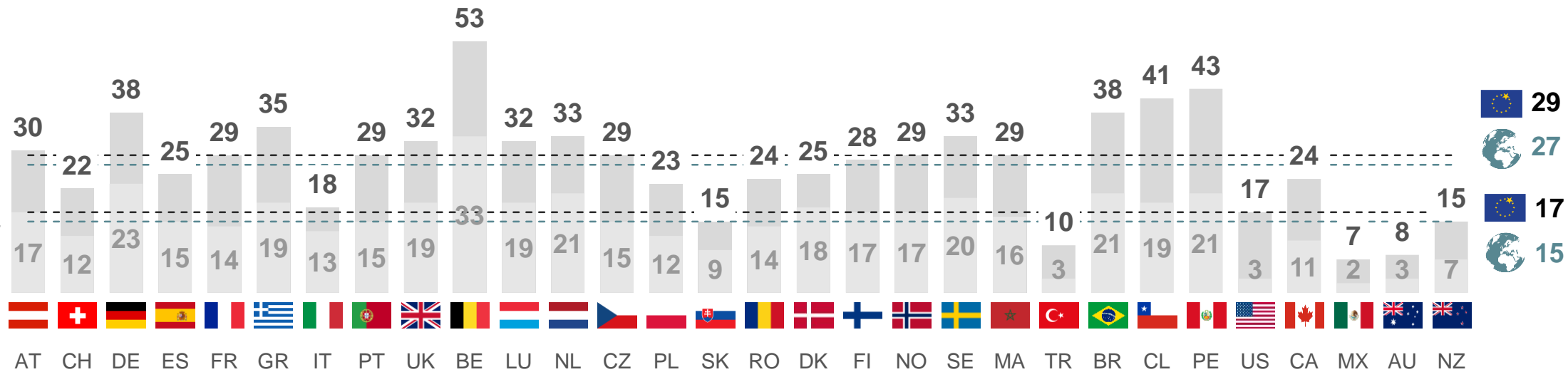
In %



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



Which of the following have you implemented or will you implement in the next 3 years?
 Response scale: Already using, considered in the next 3 years, not interested
 Basis: companies with corporate vehicles = 100%
 Question asked to respondents that are aware of mobility solutions
 100

BIKE (OR OTHER TWO WHEELS) SHARING / LEASING IMPLEMENTATION

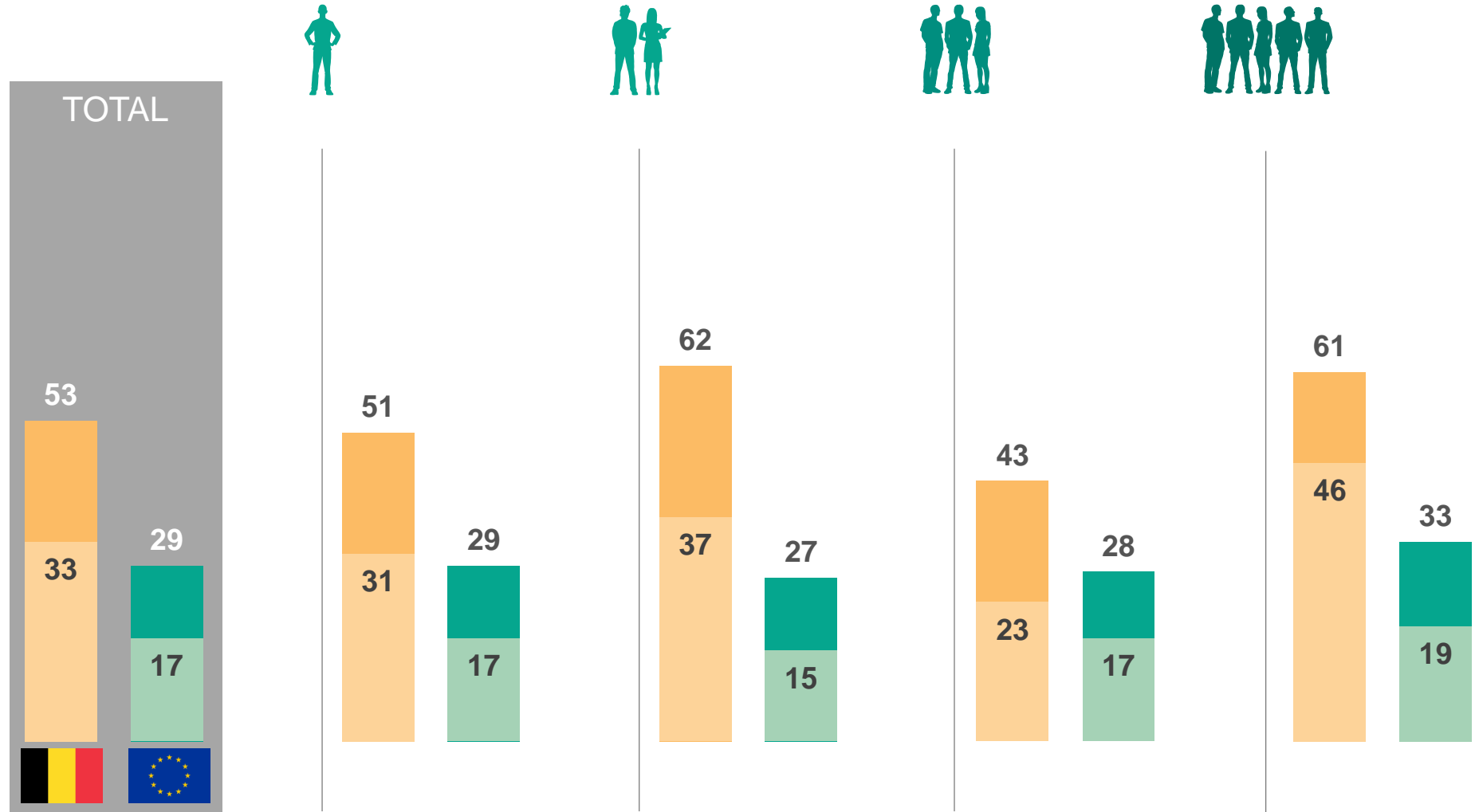
In %



ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS



ALREADY USING



Which of the following have you implemented or will you implement in the next 3 years?
 Response scale: Already using, considered in the next 3 years, not interested
 Basis: companies with corporate vehicles = 100%
 Question asked to respondents that are aware of mobility solutions

PUBLIC TRANSPORT IMPLEMENTATION

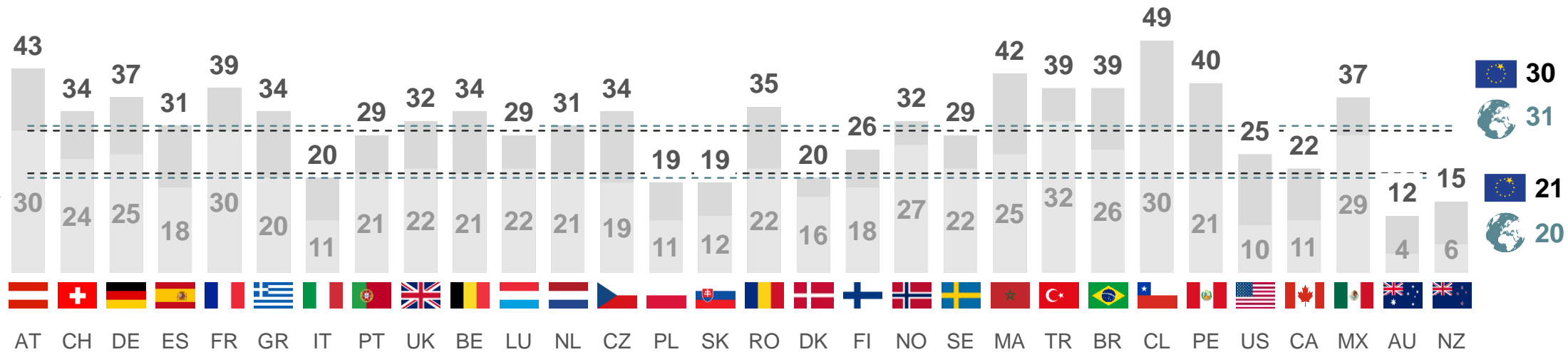
In %



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



Which of the following have you implemented or will you implement in the next 3 years?
 Response scale: Already using, considered in the next 3 years, not interested
 Basis: companies with corporate vehicles = 100%
 Question asked to respondents that are aware of mobility solutions
 102

PUBLIC TRANSPORT IMPLEMENTATION

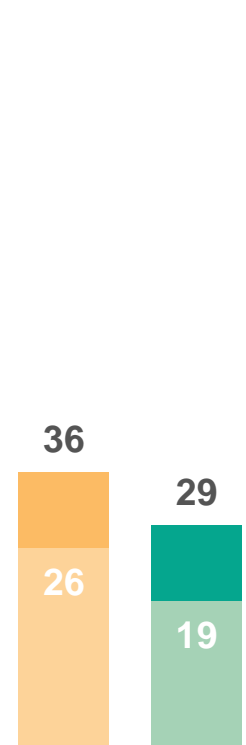
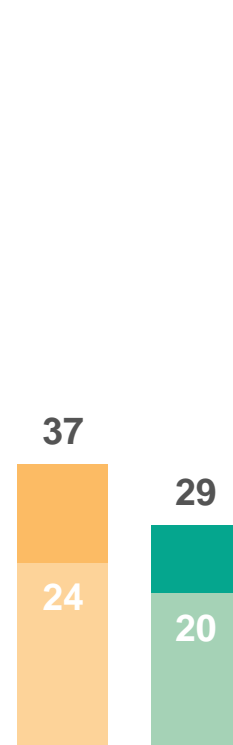
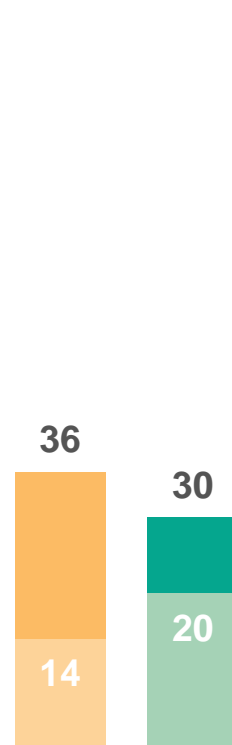
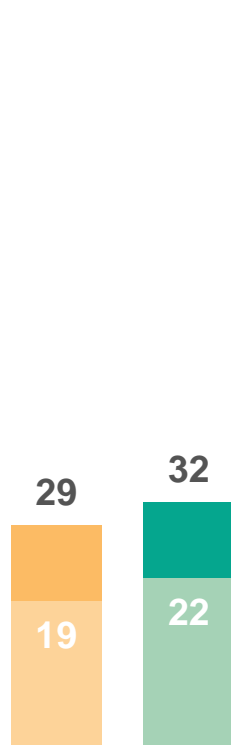
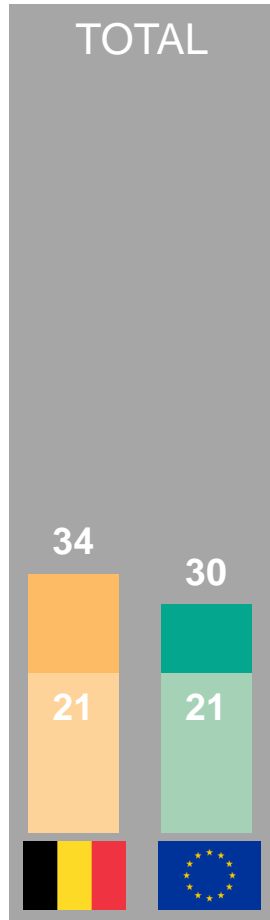
In %



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



Which of the following have you implemented or will you implement in the next 3 years?
 Response scale: Already using, considered in the next 3 years, not interested
 Basis: companies with corporate vehicles = 100%
 Question asked to respondents that are aware of mobility solutions
 103

MOBILITY BUDGET IMPLEMENTATION

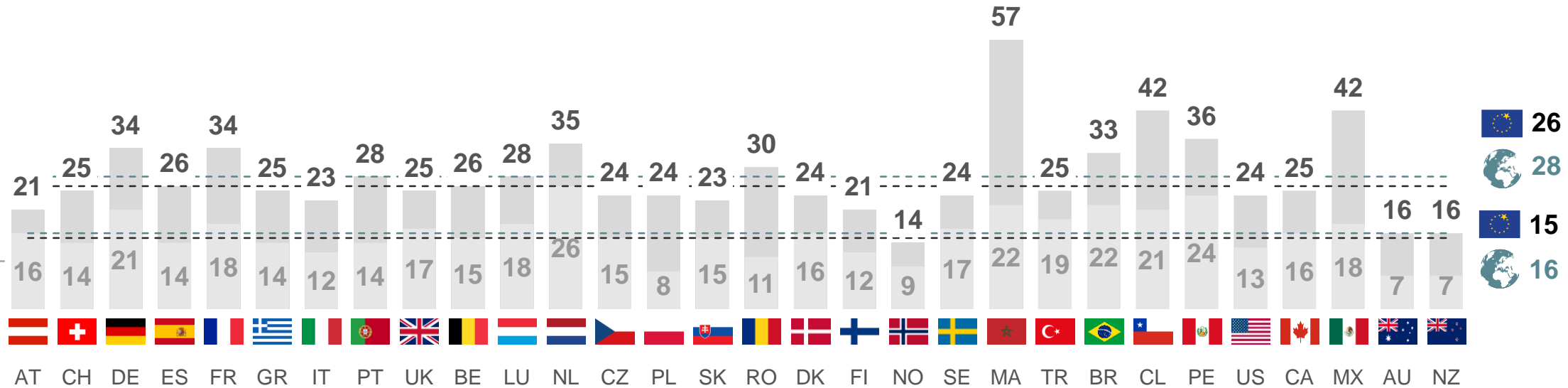
In %



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



EU 26
Global 28
EU 15
Global 16

Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions
104

MOBILITY BUDGET IMPLEMENTATION

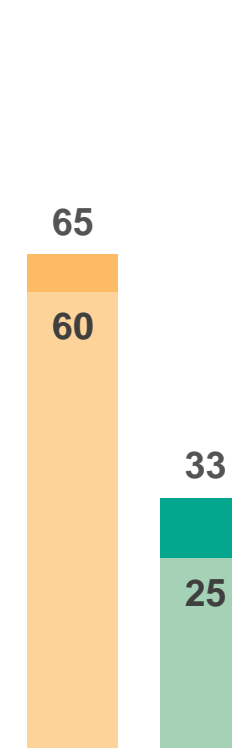
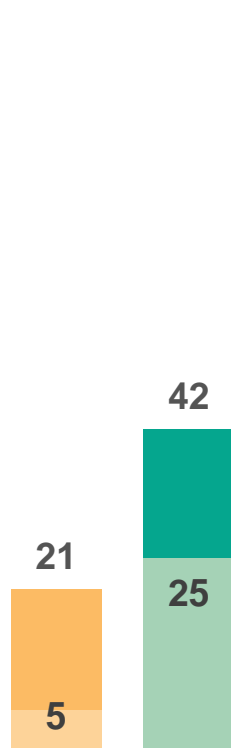
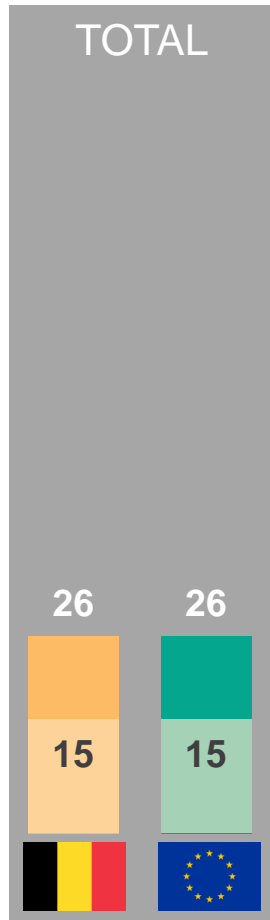
In %



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



Which of the following have you implemented or will you implement in the next 3 years?
 Response scale: Already using, considered in the next 3 years, not interested
 Basis: companies with corporate vehicles = 100%
 Question asked to respondents that are aware of mobility solutions

AN APP TO BOOK MOBILITY SOLUTIONS IMPLEMENTATION

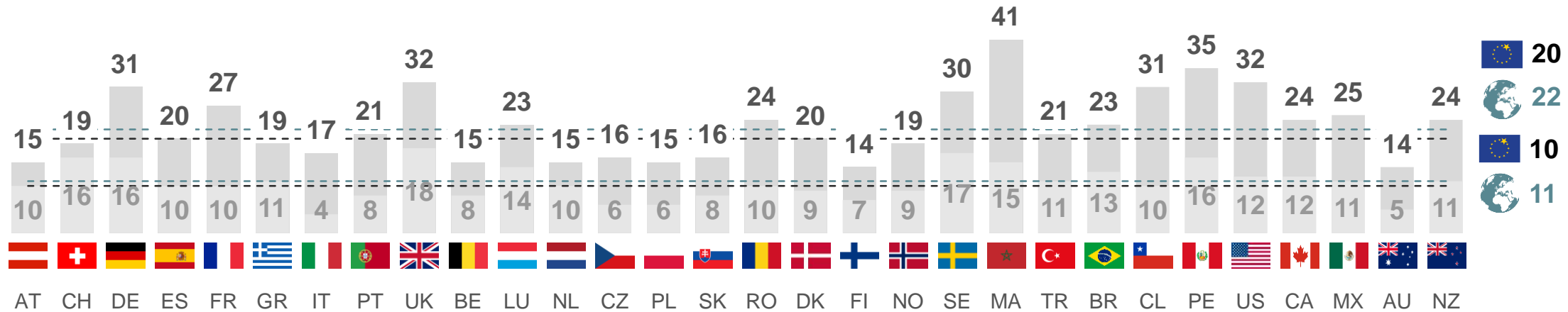
In %



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



Which of the following have you implemented or will you implement in the next 3 years?
 Response scale: Already using, considered in the next 3 years, not interested
 Basis: companies with corporate vehicles = 100%
 Question asked to respondents that are aware of mobility solutions
 106

AN APP TO BOOK MOBILITY SOLUTIONS IMPLEMENTATION

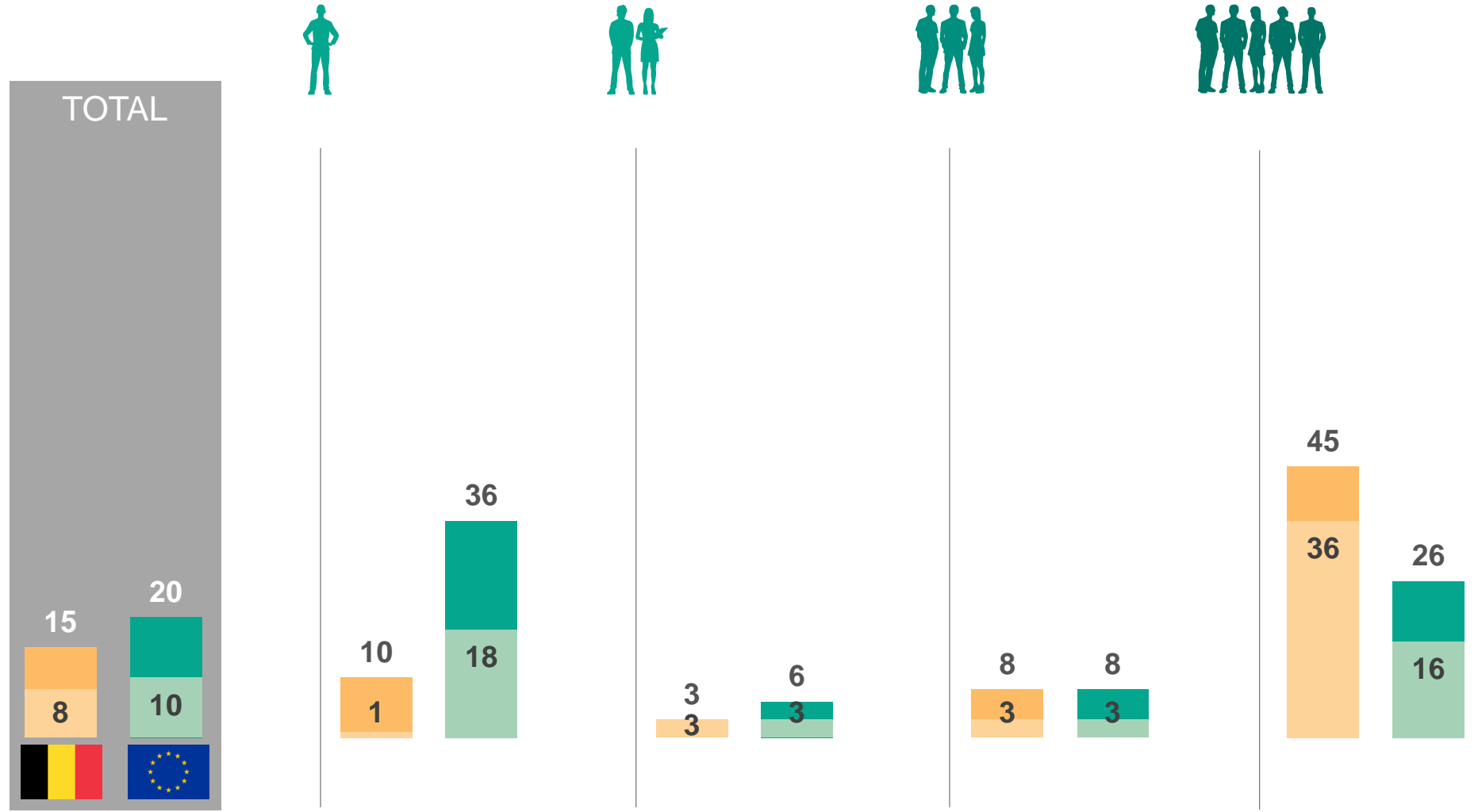
In %



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



Which of the following have you implemented or will you implement in the next 3 years?
 Response scale: Already using, considered in the next 3 years, not interested
 Basis: companies with corporate vehicles = 100%
 Question asked to respondents that are aware of mobility solutions

PRIVATE LEASE OR SALARY SACRIFICE IMPLEMENTATION

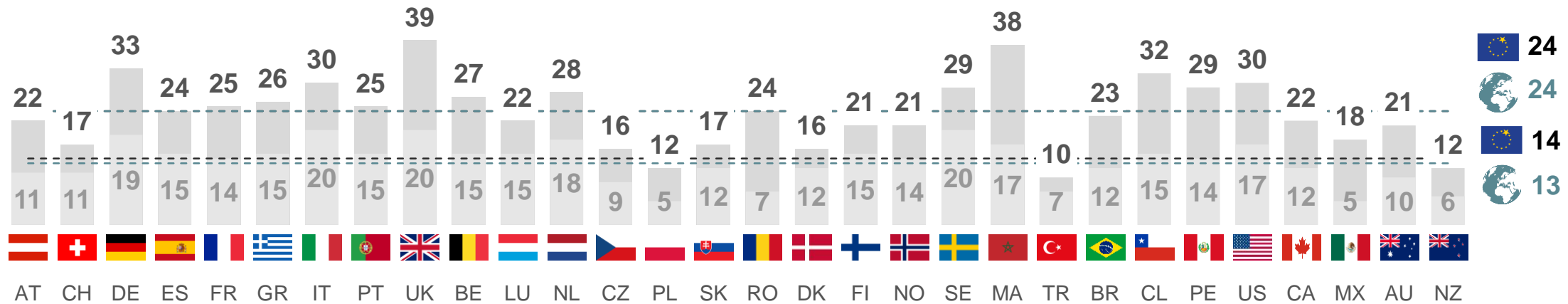
In %



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



Which of the following have you implemented or will you implement in the next 3 years?
 Response scale: Already using, considered in the next 3 years, not interested
 Basis: companies with corporate vehicles = 100%
 Question asked to respondents that are aware of mobility solutions
 108

PRIVATE LEASE OR SALARY SACRIFICE IMPLEMENTATION

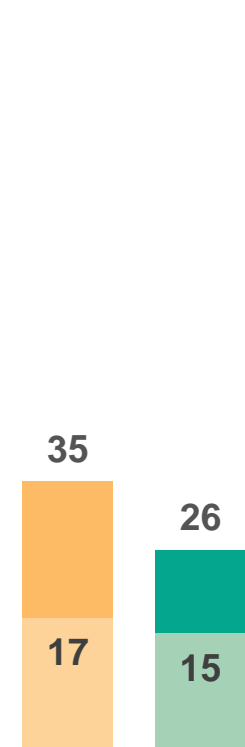
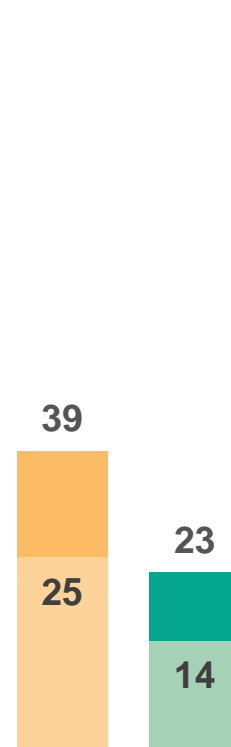
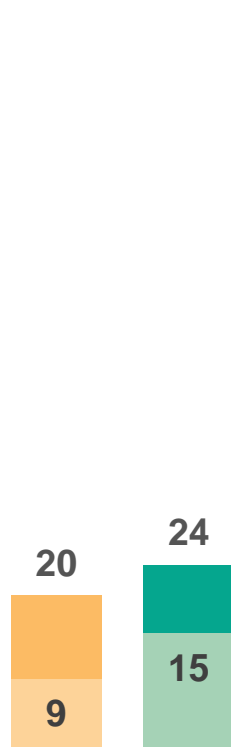
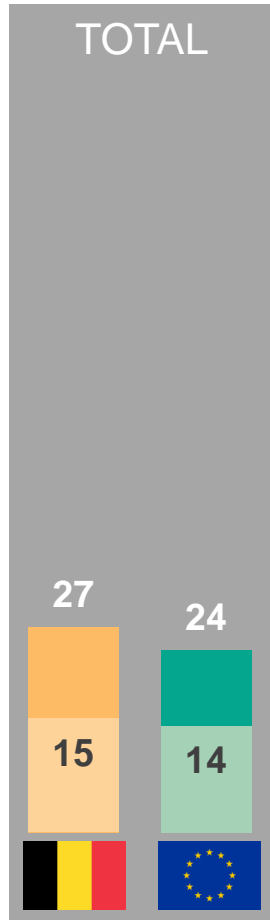
In %



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



Which of the following have you implemented or will you implement in the next 3 years?
 Response scale: Already using, considered in the next 3 years, not interested
 Basis: companies with corporate vehicles = 100%
 Question asked to respondents that are aware of mobility solutions

SHORT OR MID-TERM RENTAL VEHICLES IMPLEMENTATION

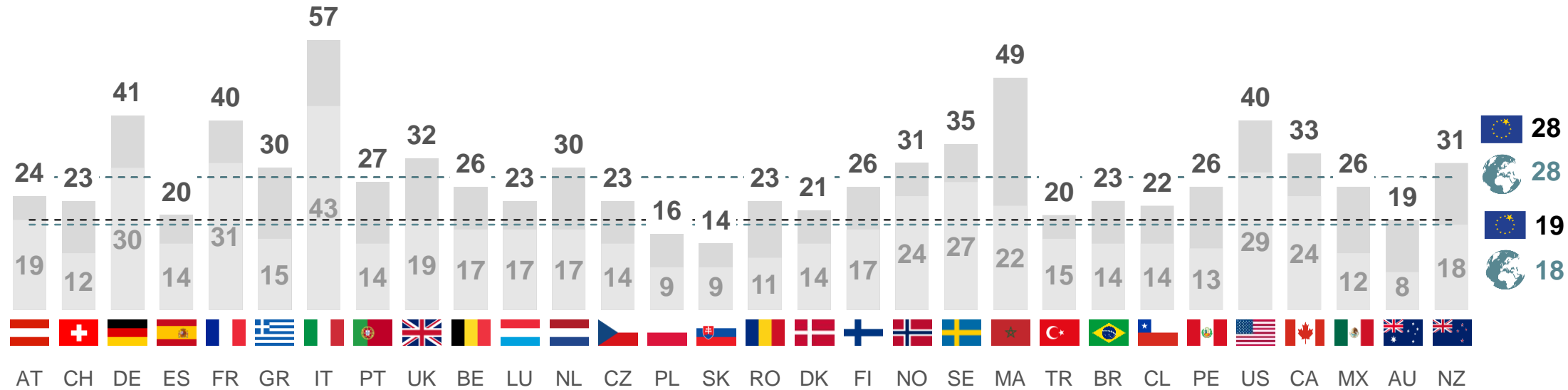
In %



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



Which of the following have you implemented or will you implement in the next 3 years?
 Response scale: Already using, considered in the next 3 years, not interested
 Basis: companies with corporate vehicles = 100%
 Question asked to respondents that are aware of mobility solutions
 110

SHORT OR MID-TERM RENTAL VEHICLES IMPLEMENTATION

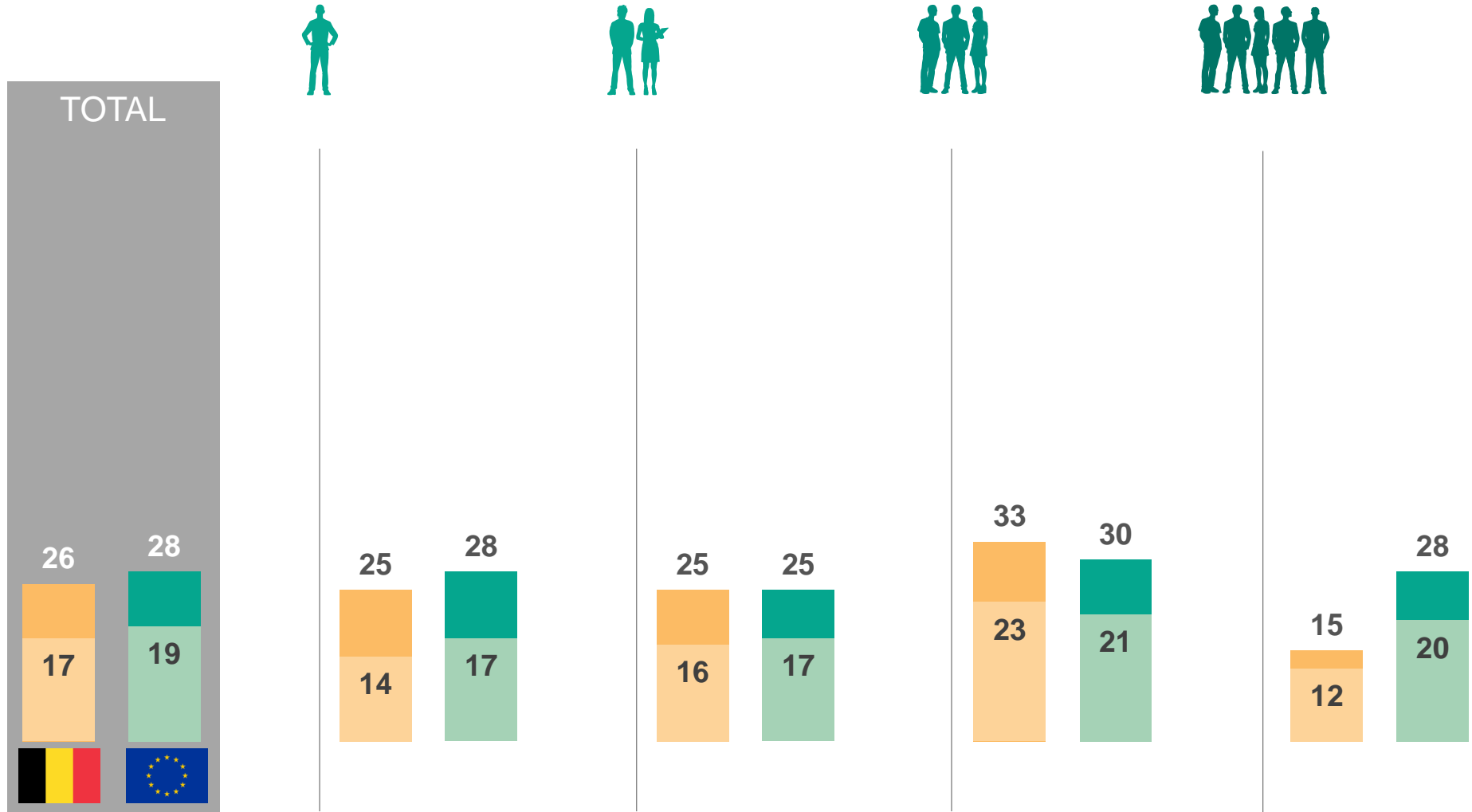
In %



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



Which of the following have you implemented or will you implement in the next 3 years?
 Response scale: Already using, considered in the next 3 years, not interested
 Basis: companies with corporate vehicles = 100%
 Question asked to respondents that are aware of mobility solutions

CAR OR CASH ALLOWANCE IMPLEMENTATION

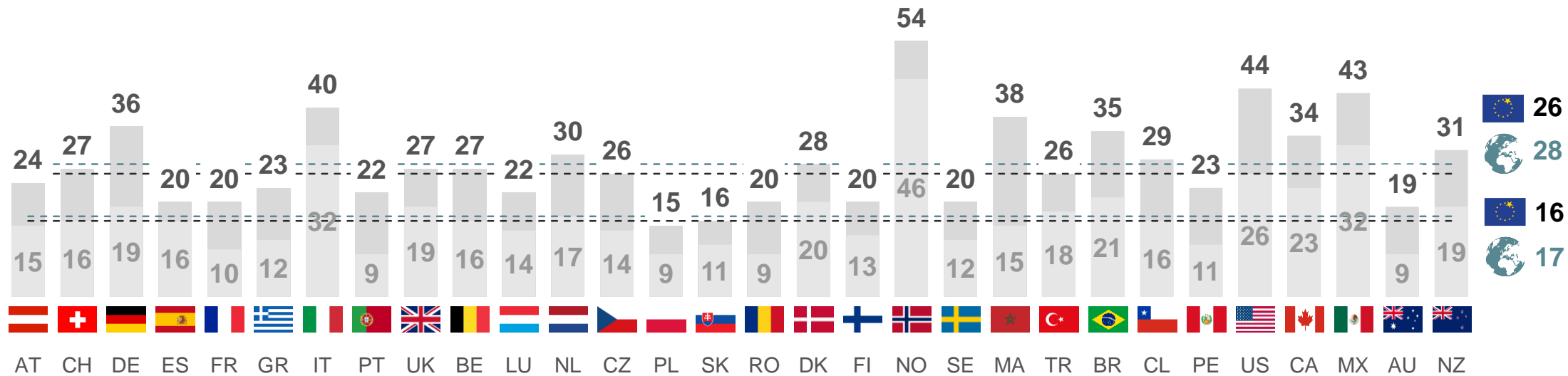
In %



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



EU 26
Globe 28
EU 16
Globe 17

Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions
112

CAR OR CASH ALLOWANCE IMPLEMENTATION

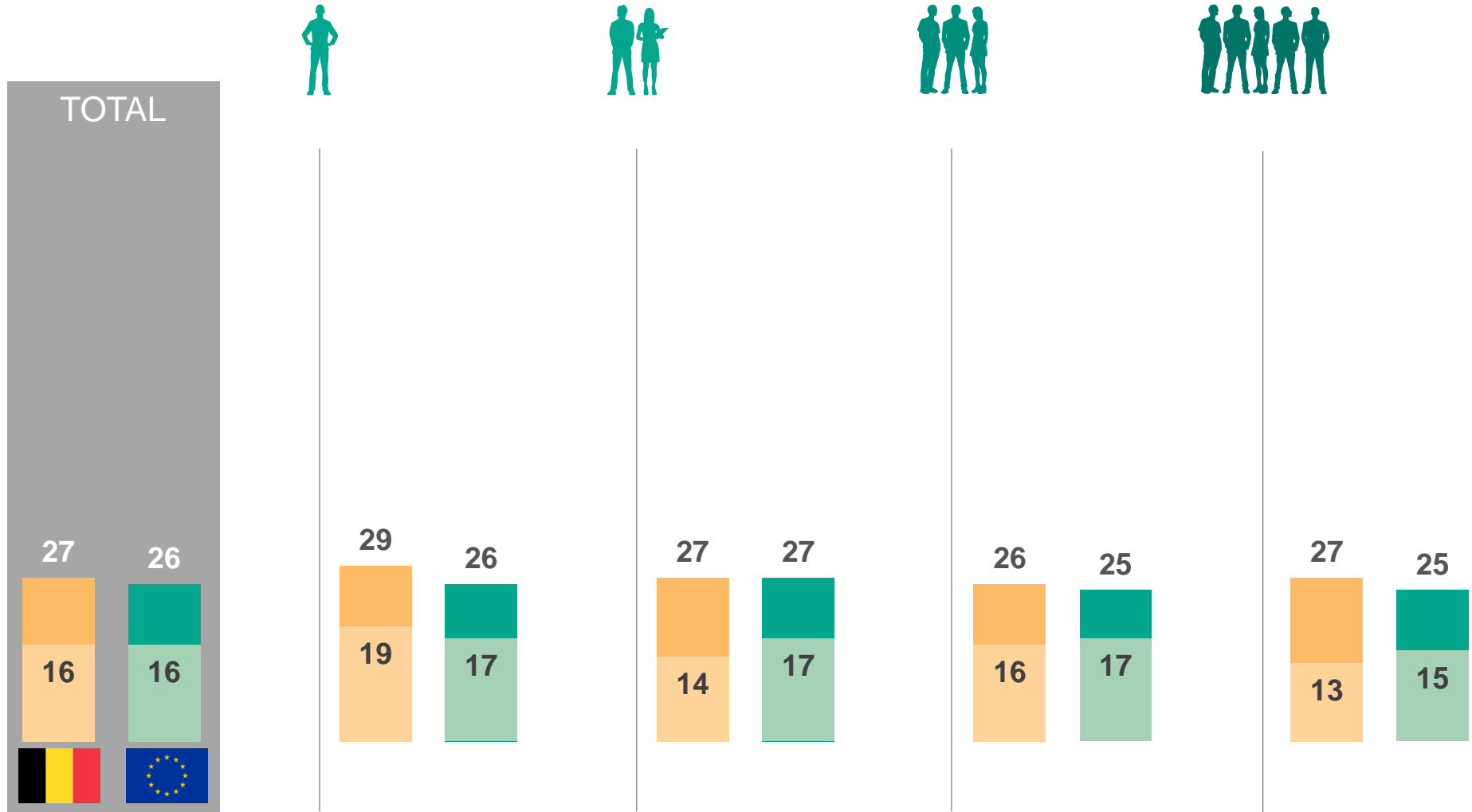
In %



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



Which of the following have you implemented or will you implement in the next 3 years?
 Response scale: Already using, considered in the next 3 years, not interested
 Basis: companies with corporate vehicles = 100%
 Question asked to respondents that are aware of mobility solutions
 113

REASONS FOR IMPLEMENTING OR CONSIDERING MOBILITY SOLUTIONS

In %



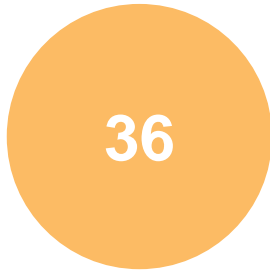
PROVIDING FULL DISCLOSURE OF THE MOBILITY BUDGET

In %

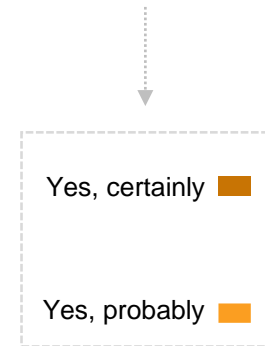


Passenger cars + LCVs

COMPANIES
OFFERING OR
CONSIDERING TO
OFFER A MOBILITY
PLAN TO EMPLOYEES

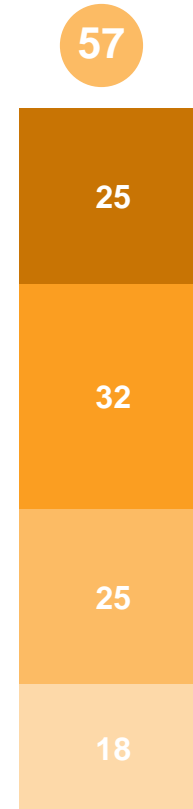


NET HAVE INTENTION TO GIVE A FULL
DISCLOSURE TO THE EMPLOYEES
(Yes, certainly + Yes, probably)



No, probably no ■

No, certainly not ■

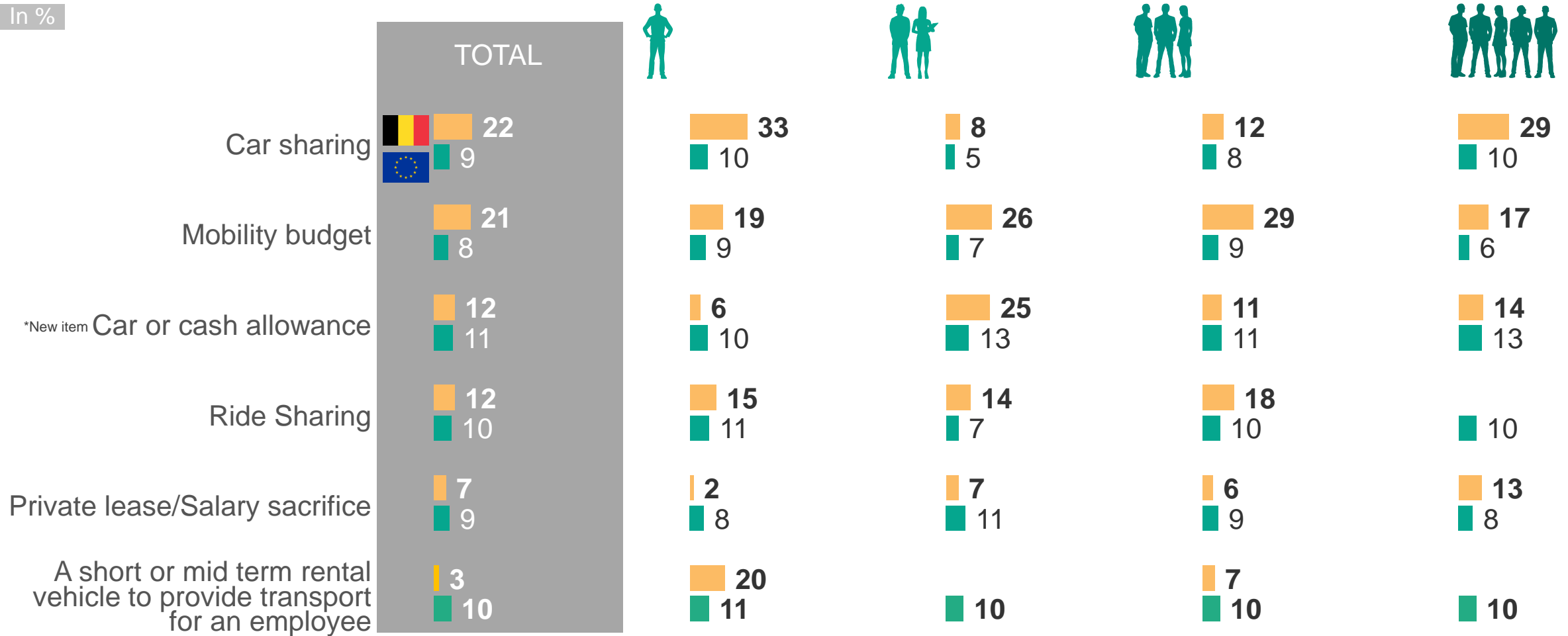


When offering such a mobility program, would you give the employees full disclosure of their budget and the real costs?
Basis: companies that offer or consider offering mobility plans to the employees
Question asked to respondents that are aware of mobility solutions

LIKELIHOOD TO GIVE UP ALL / PART OF THE FLEET FOR MOBILITY SOLUTIONS

Certainly

In %



Would you anticipate that your company would give up all or part of the company car fleet for such alternatives?

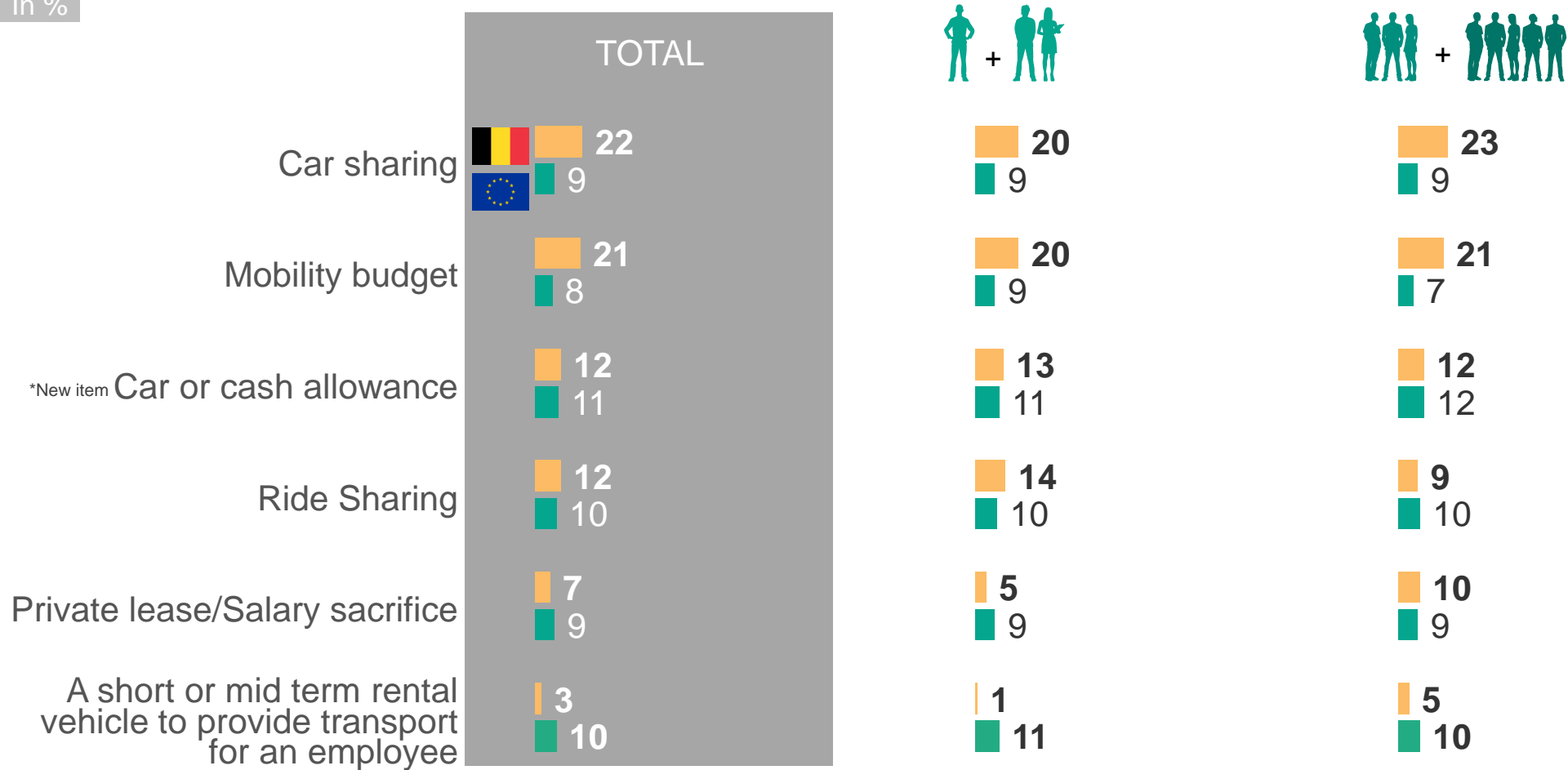
Basis: companies using or considering at least one mobility solution

Question asked to respondents that are aware of mobility solutions

LIKELIHOOD TO GIVE UP ALL / PART OF THE FLEET FOR MOBILITY SOLUTIONS

Certainly

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 at least one mobility solution

Question asked to respondents that are aware of mobility solutions

117

EMPLOYEES CONCERNED BY THE MOBILITY PLAN

In %



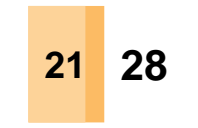
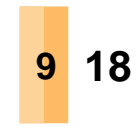
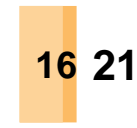
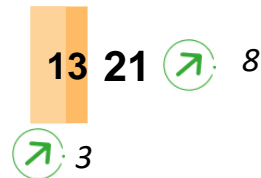
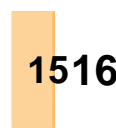
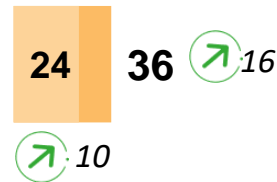
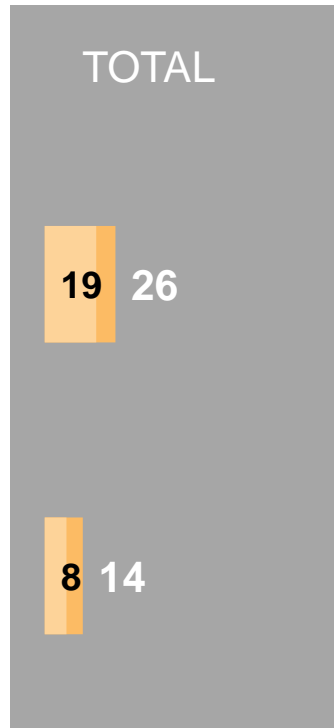
Passenger cars + LCVs

Already offering

NET Already offering or consider

Only the ones who have a company car

All of your employees

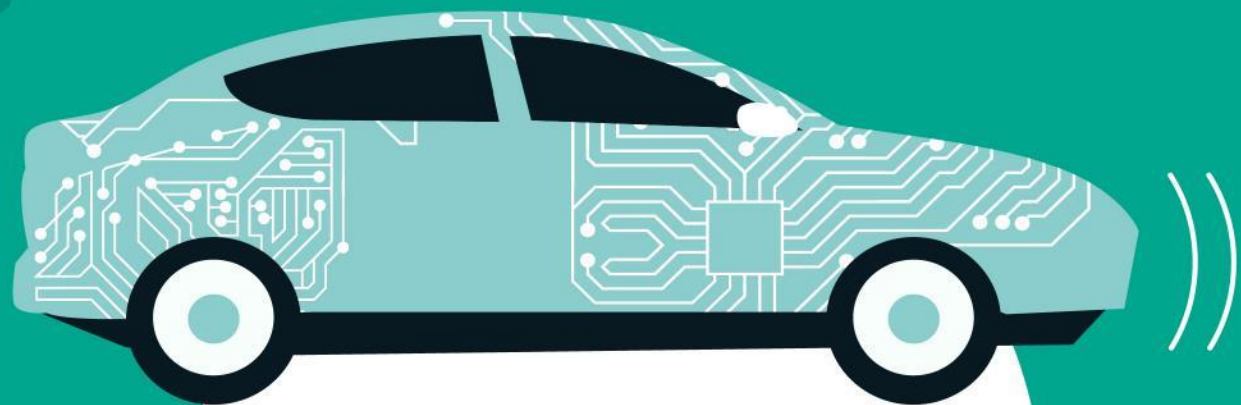


Do you offer or consider offering a mobility plan to all of your employees or to the ones who have a company car only?
Basis: companies with corporate vehicles = 100%

Question asked to respondents that are aware of mobility solutions

7

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



PROPORTION OF COMPANIES USING CONNECTED VEHICLES

All vehicles

In %



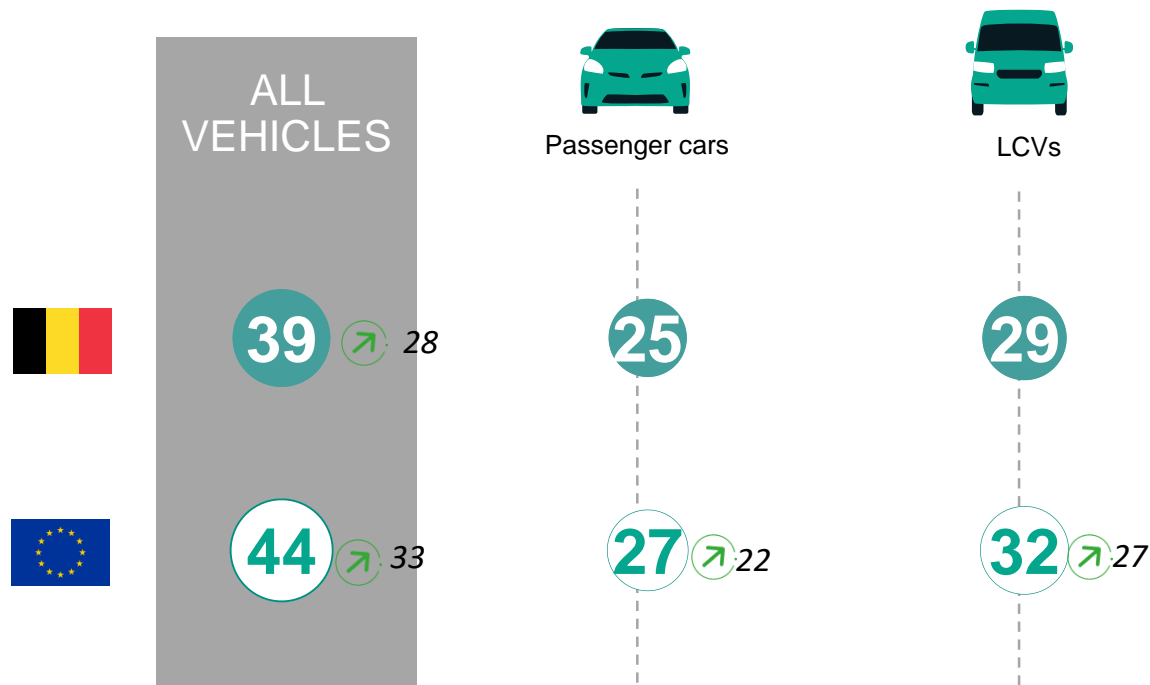
Passenger cars + LCVs

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

HOW TO READ THE RESULTS ?

39% of companies with fleet using connected vehicles for all or part of their fleet.

25% use connected vehicles for passenger cars, while 29% use connected vehicles for LCVs.



Is your fleet connected thanks to a telematic tool?

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

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

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

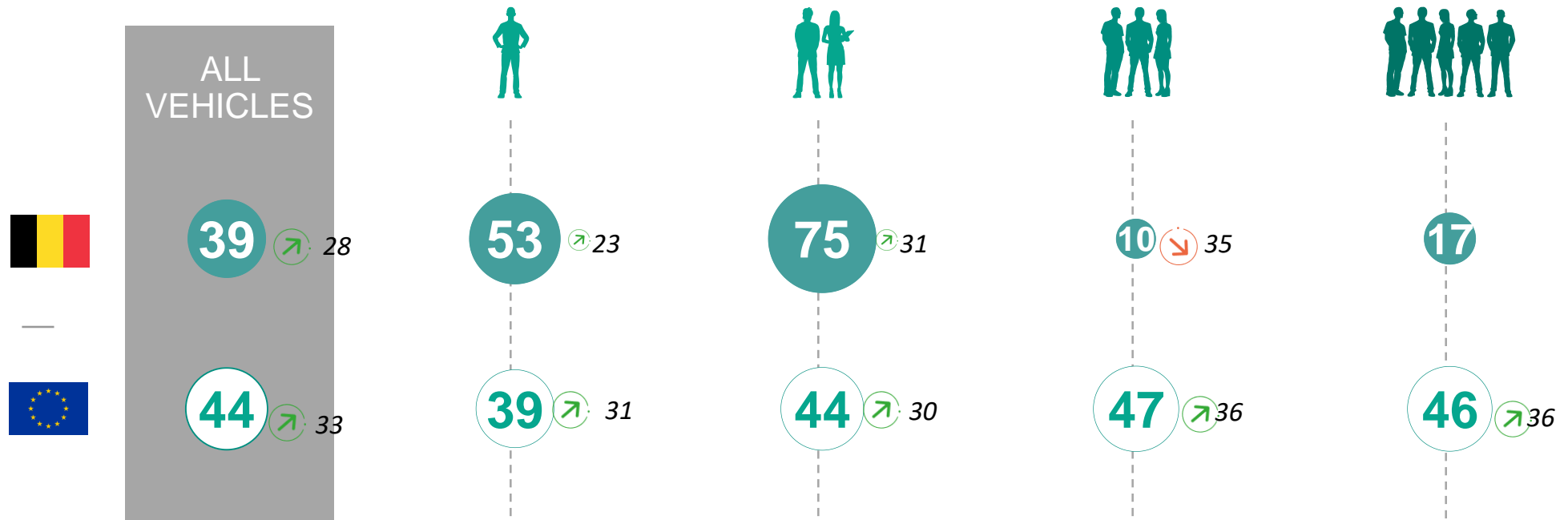
All vehicles

In %



Passenger cars + LCVs

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



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

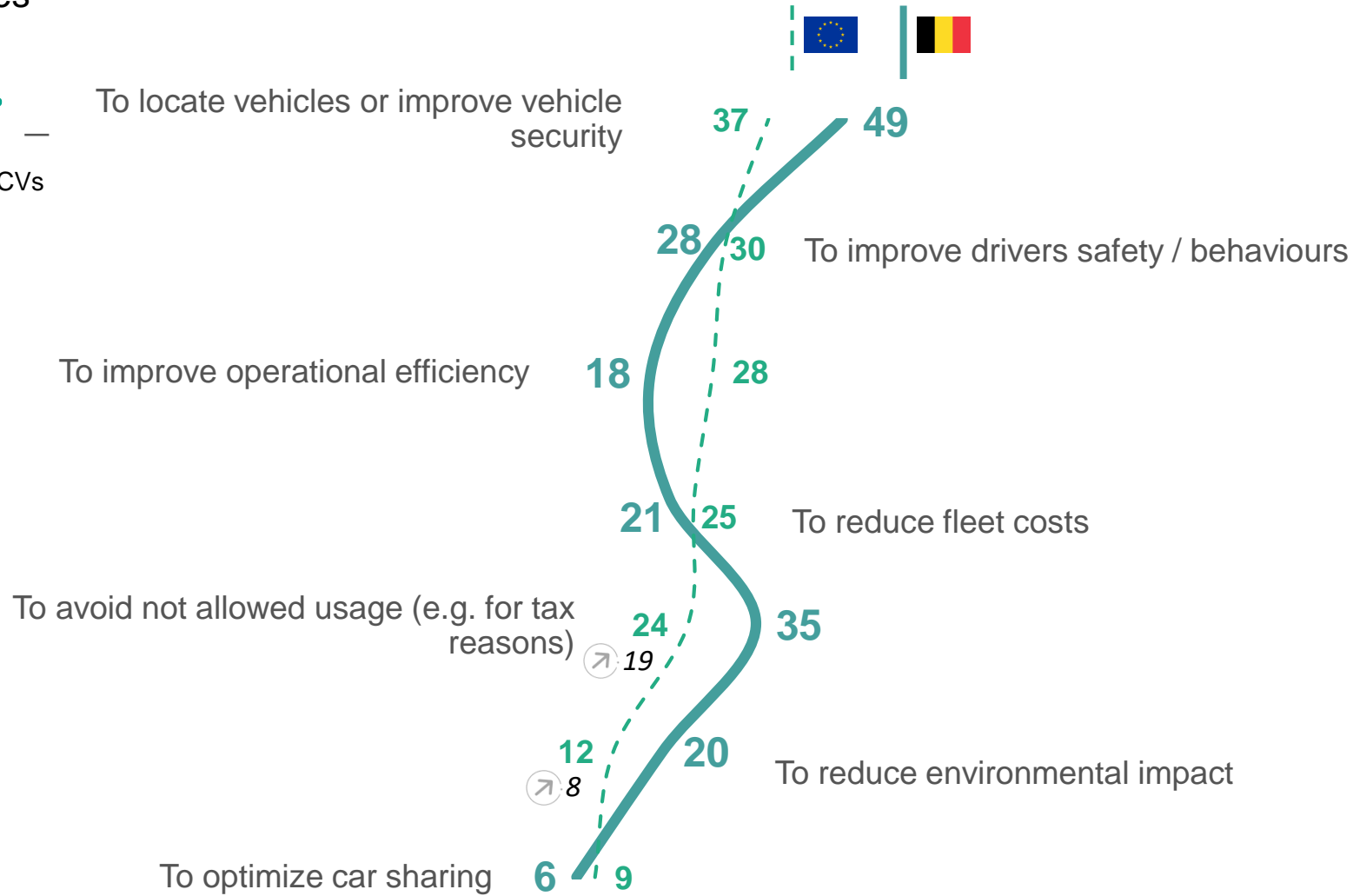
REASONS FOR USING CONNECTED VEHICLES

All vehicles

In %



Passenger cars + LCVs

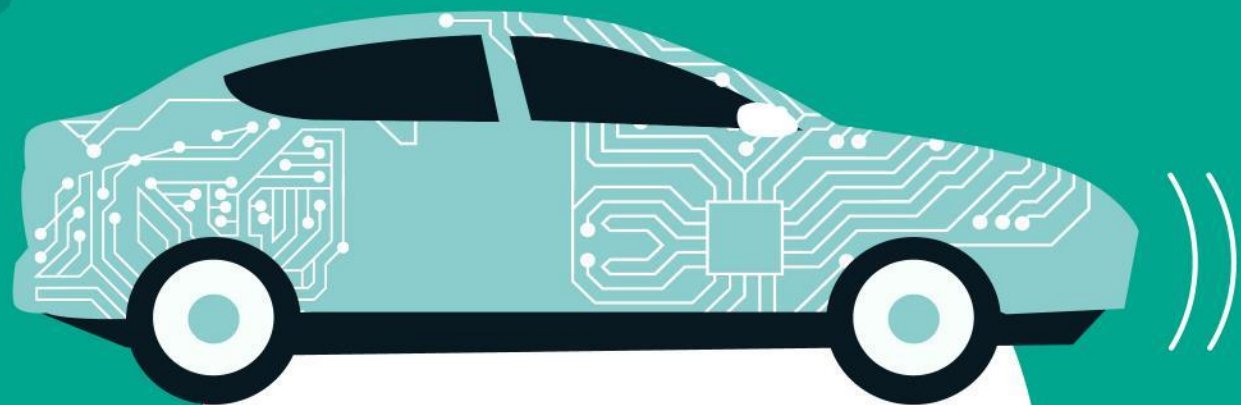
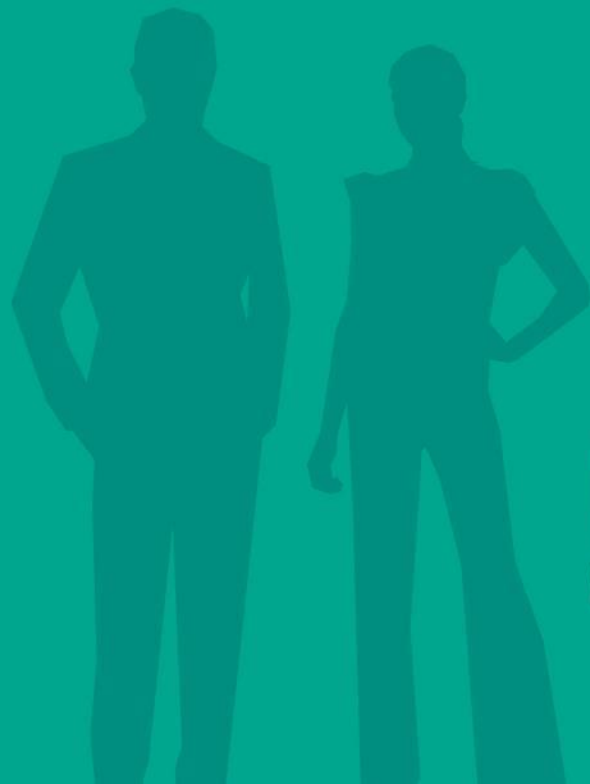


What are the two main reasons why your fleet is connected by Telematics?
 Basis: companies with connected vehicles thanks to Telematics

7

CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY

A. PASSENGER CARS



PROPORTION OF COMPANIES USING CONNECTED VEHICLES

Passenger cars

In %

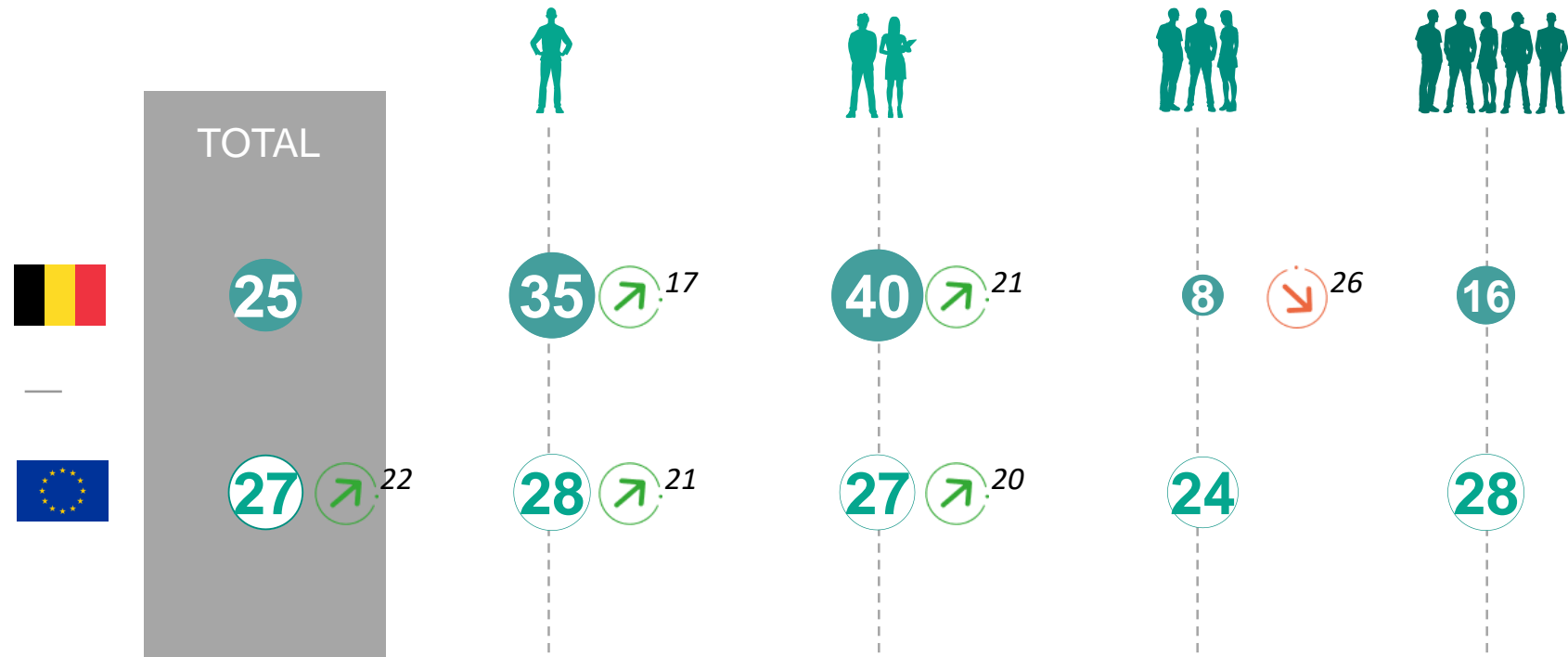


Passenger cars

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

HOW TO READ THE RESULTS ?

19% use connected vehicles for passenger cars.



Is your fleet connected thanks to a telematic tool?

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

Basis: companies with at least one passenger car in fleet

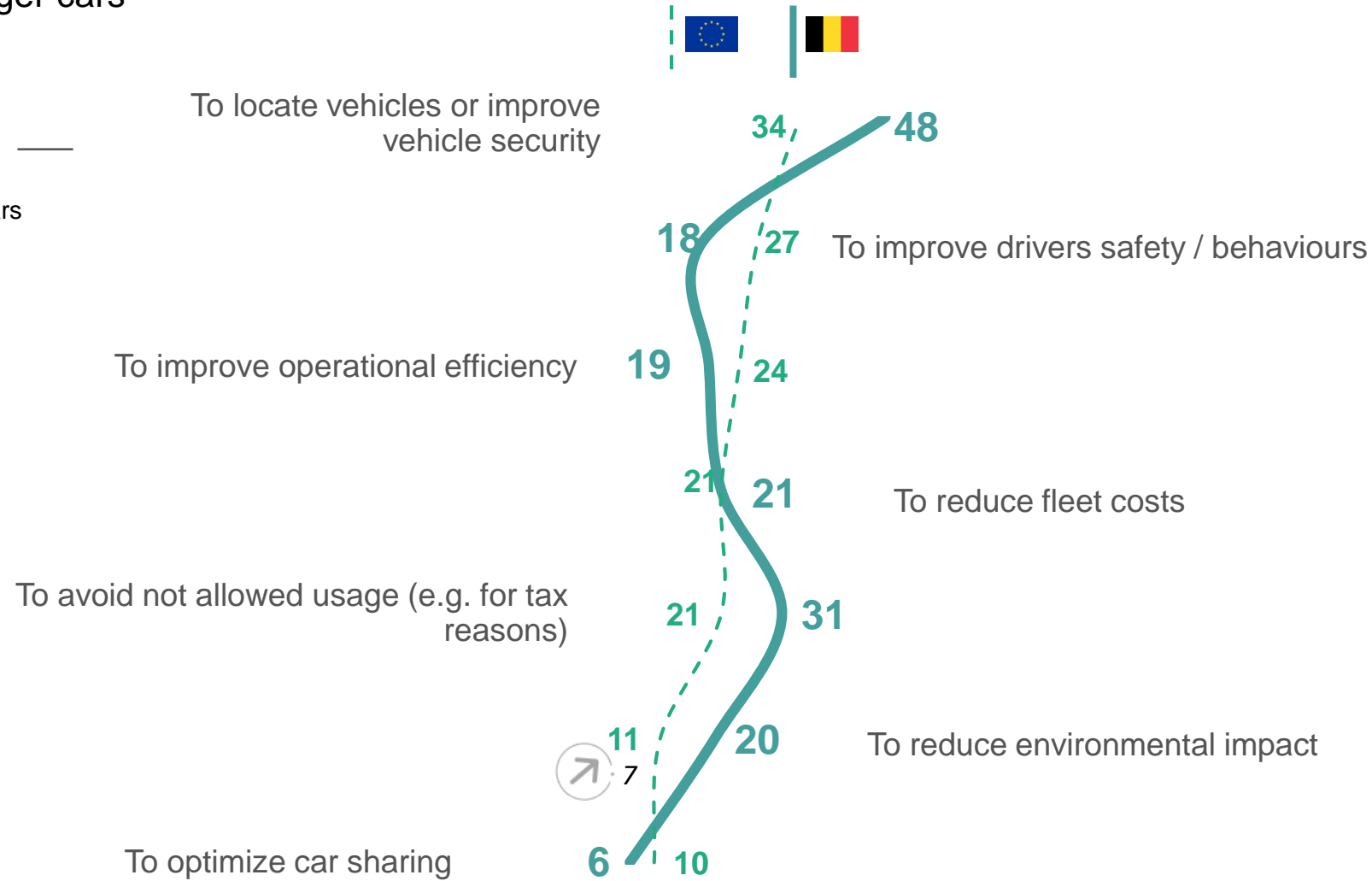
REASONS FOR USING CONNECTED VEHICLES

Passenger cars

In %



Passenger cars

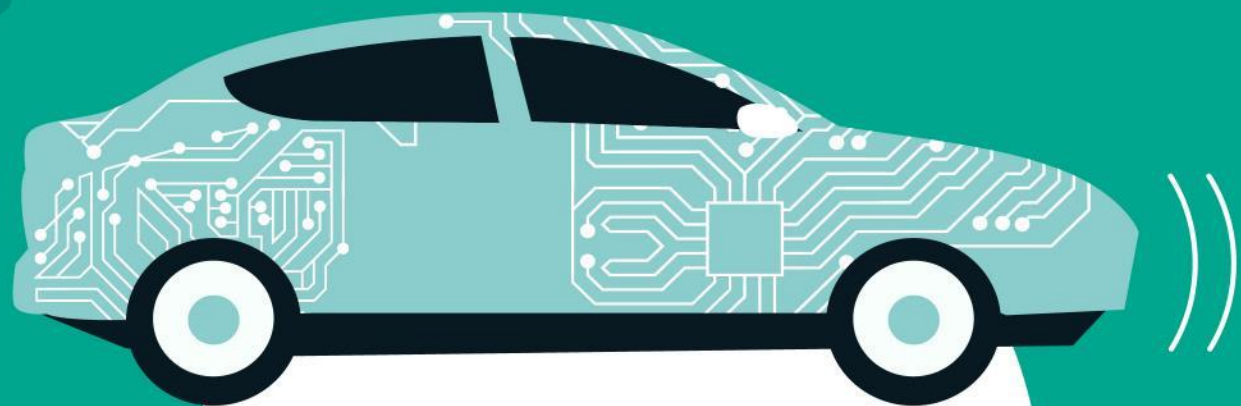


What are the two main reasons why your fleet is connected by Telematics?
 Basis: companies with connected passenger cars thanks to Telematics

7

CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY

B. LCVs



PROPORTION OF COMPANIES USING CONNECTED VEHICLES

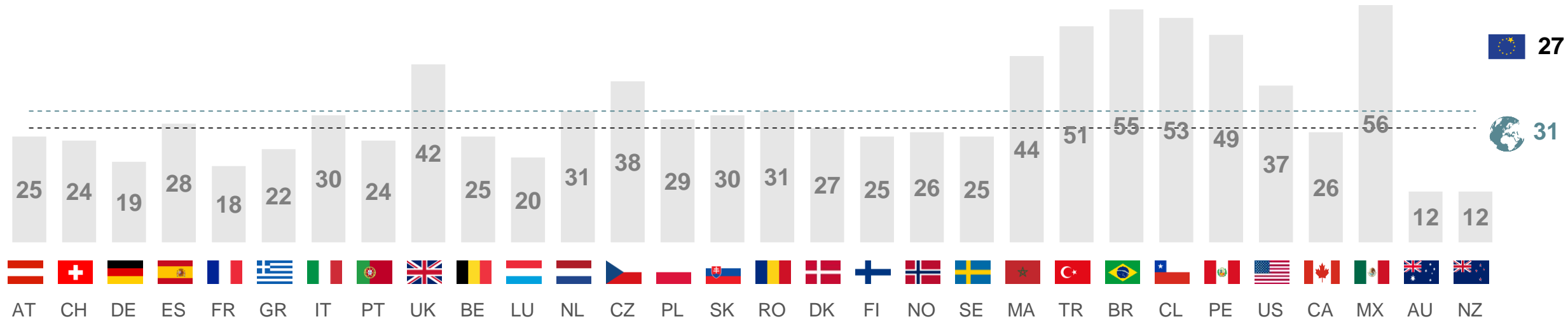
Passenger cars

In %



Passenger cars

PROPORTION OF COMPANIES USING CONNECTED VEHICLES FOR THEIR PASSENGER CARS



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

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

LCVs

In %

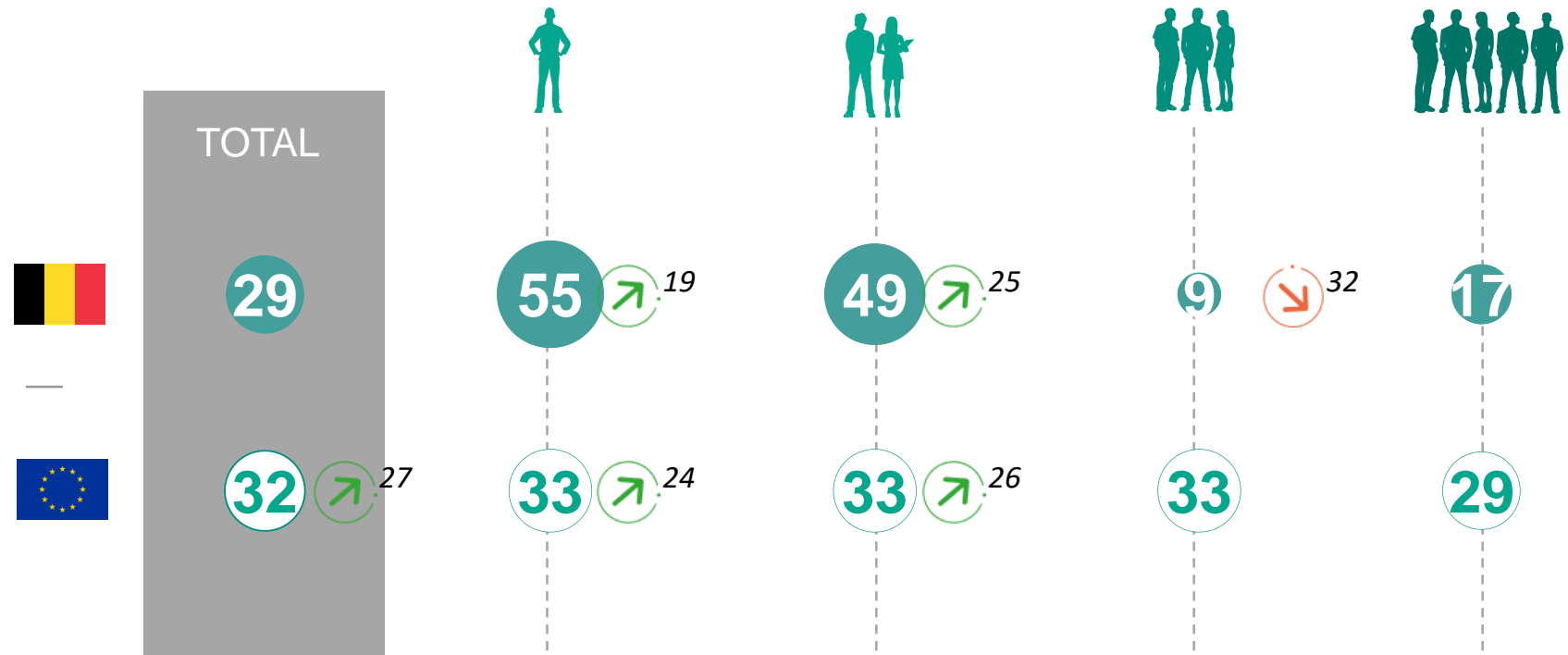


LCVs

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

HOW TO READ THE RESULTS ?

22% use connected vehicles for LCVs.



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

Basis: companies with at least one LCV car in fleet

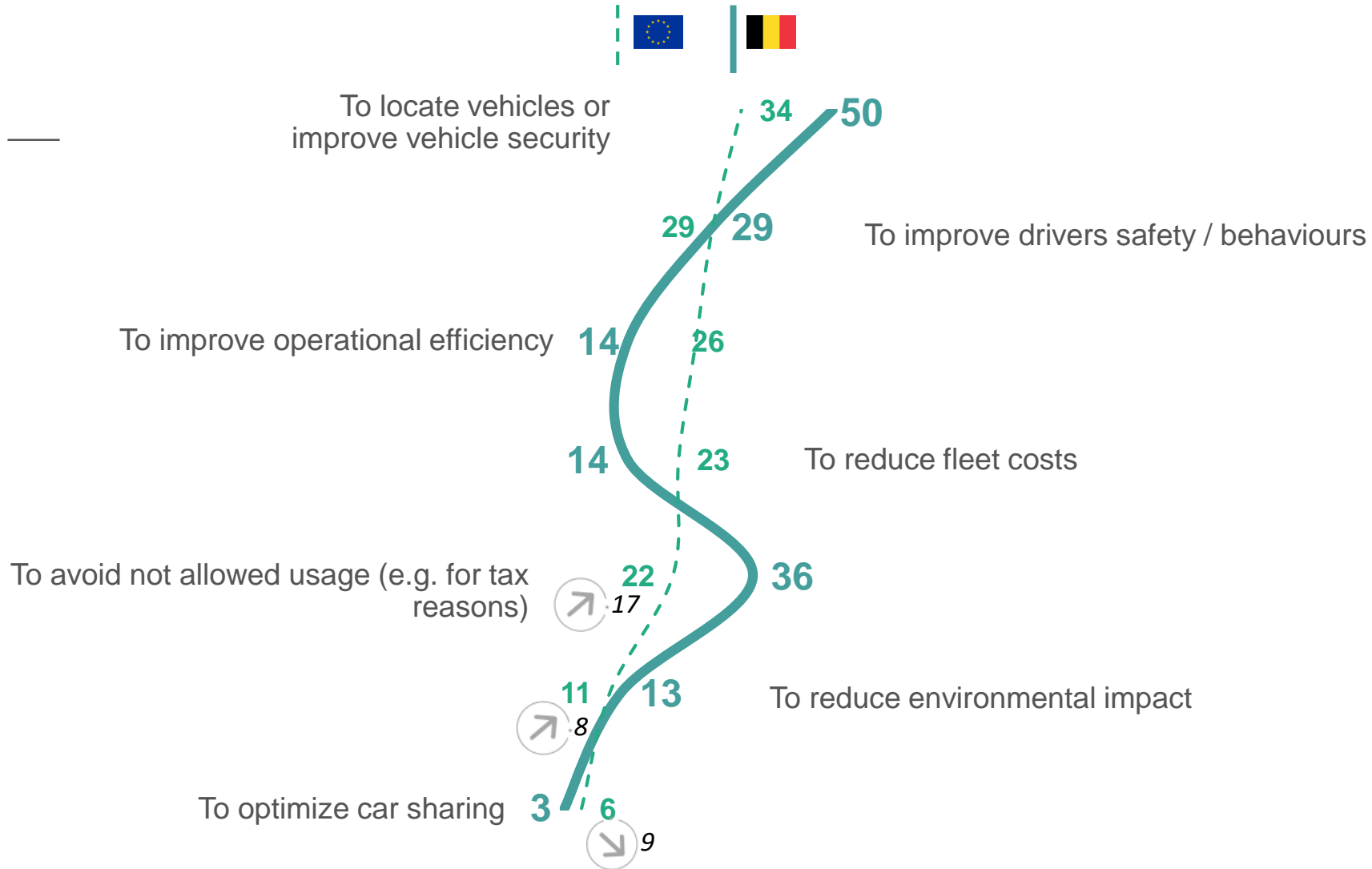
REASONS FOR USING CONNECTED VEHICLES

LCVs

In %



LCVs

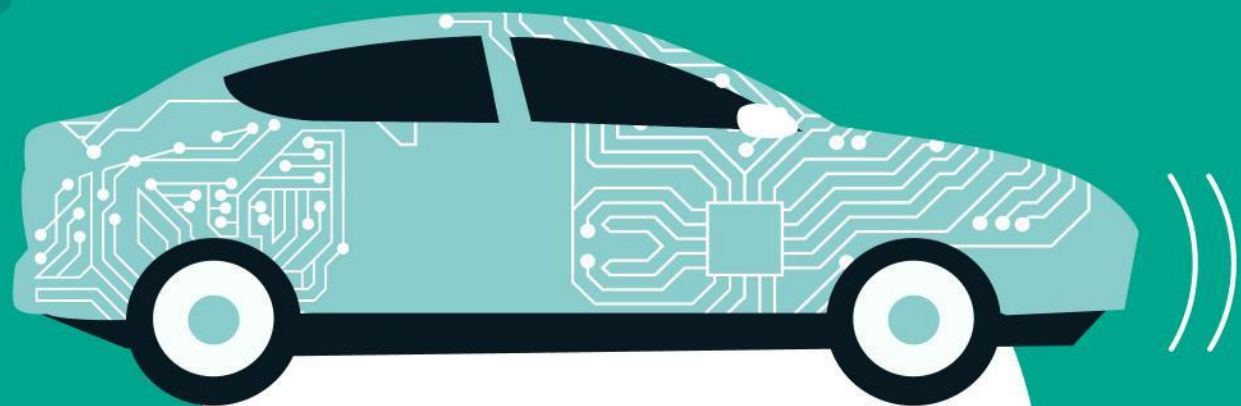


What are the two main reasons why your fleet is connected by Telematics?
Basis: companies with connected LCVs thanks to Telematics

7

CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY

C. ROAD SAFETY

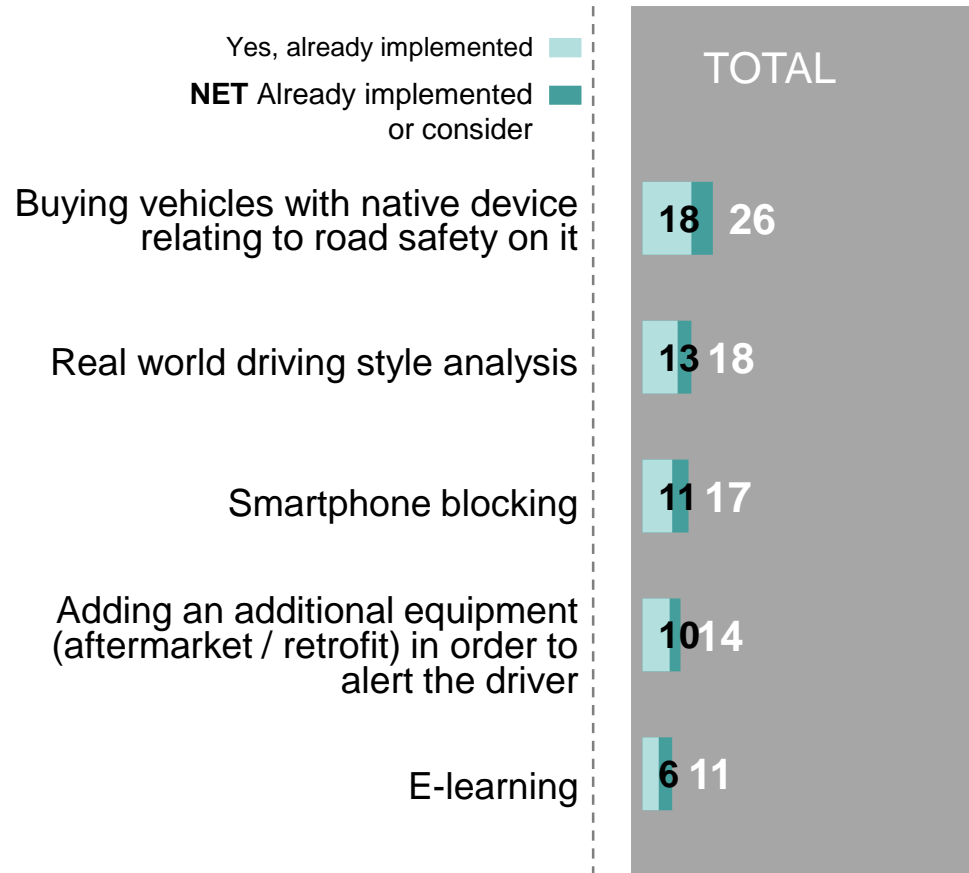


ACTIONS SET UP TO INCREASE ROAD SAFETY

In %



Passenger cars + LCVs



In order to increase road safety, does your company set up the following actions?
Basis: companies with corporate vehicles = 100%

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

Arval Mobility
Observatory

A close-up, low-angle shot of the side of a dark blue car, showing the front wheel and the lower part of the body. The car is parked on a gravel surface with yellow flowers. The background is a blurred scene of green trees and a bright sky.

Thank you

