



2019 FLEET BAROMETER

Europe 



April 2019 / Survey n°1800954

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PERIMETER OF THE STUDY – FOCUS EUROPE

12 COUNTRIES



METHODOLOGY



DATA COLLECTION METHOD

CATI System
(Computer Assisted Telephone Interviewing)



FIELDWORK PERIOD

MAR
06



MAR
29



TARGET

Fleet managers in companies of all industries using at least **1 corporate vehicle**



QUOTAS

Company size & sector



SAMPLE

3 541 interviews through Europe

12 countries: France, Italy, United Kingdom, The Netherlands, Spain, Belgium, Czech Republic, Germany, Poland, Portugal, Switzerland, Luxembourg

To be noted: Turkey is not included in the European scope of the survey



DURATION OF INTERVIEW

10 minutes on average

NUMBER OF INTERVIEWS CONDUCTED

Perimeter of the survey: companies owning at least 1 vehicle



Companies with less than 10 employees

1 185 interviews



Companies with 10 to 99 employees

779 interviews



Companies with 100 to 249 / 499 / 999 employees

917 interviews







Companies with 250 / 500 / 1 000 employees and more

660 interviews

**1 to 99
employees
1 964 interviews**

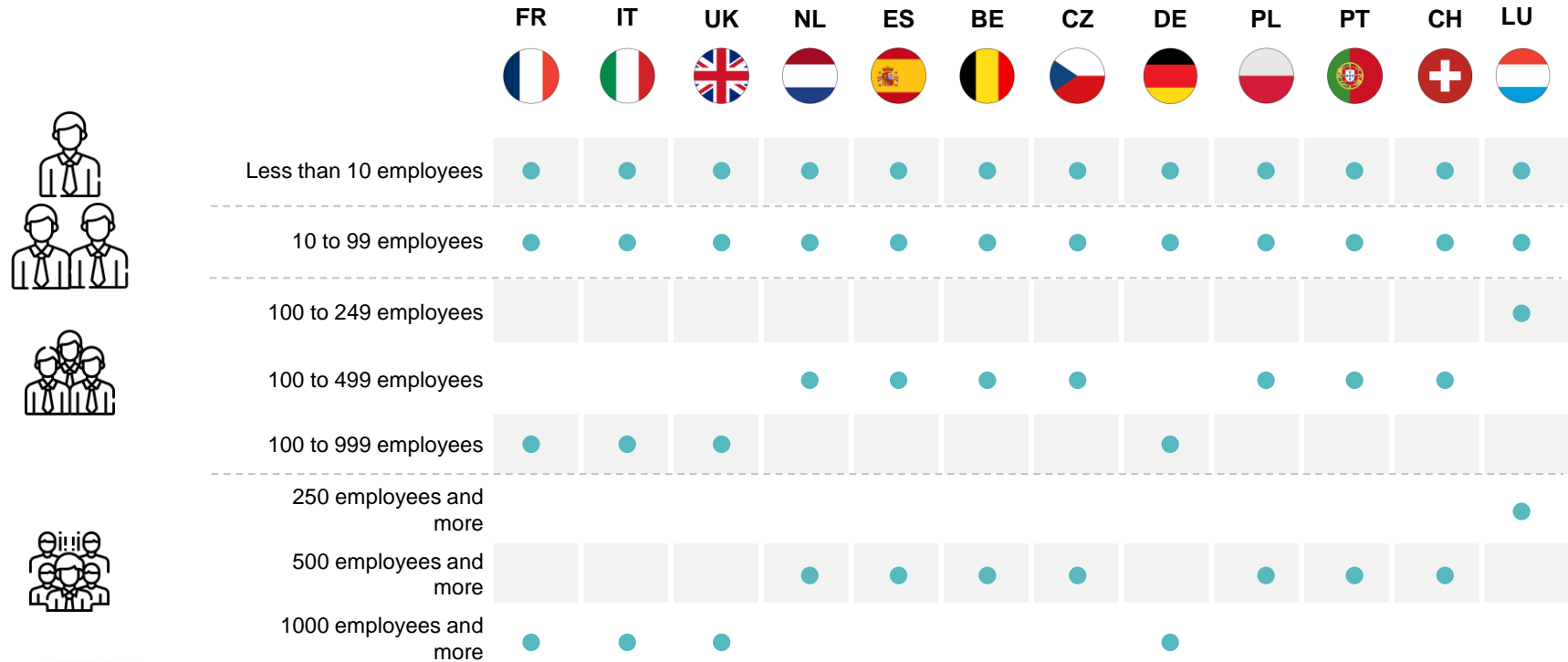
**100 employees
and more
1 577 interviews**

SAMPLE STRUCTURE

Company size & sector					Total
Construction	19%	18%	11%	7%	14%
Industry	17%	30%	39%	35%	29%
Services	39%	31%	32%	41%	36%
Trade	26%	21%	18%	16%	21%
TOTAL	100%	100%	100%	100%	100%
Weight of each company size segment	33%	20%	27%	20%	100%

*This sample structure was set up in order to be roughly **representative of the number of cars 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.*

SAMPLE



PICTOGRAMS

Company size



Less than 10 employees



10 – 99 employees



100 to 249 / 499 / 999 employees



**250 / 500 / 1000 employees
and more**

MAIN RESULTS

MAIN RESULTS - EUROPE

#1

A SURVEY IN WHICH WE INTERVIEWED 3,541 FLEET MANAGERS IN EUROPE BY PHONE IN MARCH 2019. 12 COUNTRIES PARTICIPATED IN THIS STUDY.

#2

FLEET MANAGERS REMAIN OPTIMISTIC ABOUT THE GROWTH POTENTIAL OF THEIR FLEET SIZE BUT AT A SLIGHTLY LOWER LEVEL THAN IN 2018.

#3

TAX MEASURES THAT BOOST THE DEVELOPMENT OF ALTERNATIVE ENERGIES SUCH AS ELECTRIC, HYBRID AND PLUG-IN HYBRIDS FOR COMPANIES WITH 100 OR MORE EMPLOYEES.

#4

OPERATING LEASING, WIDELY ADOPTED BY THE LARGEST COMPANIES, IS DEVELOPING IN SMALL AND MEDIUM-SIZED COMPANIES.

#5

TELEMATICS TOOLS ARE SLOWLY BEING INSTALLED IN A CONTEXT OF GDPR DEPLOYMENT.

#6

ALTERNATIVE SOLUTIONS.

MOBILITY

#1

A SURVEY IN WHICH WE INTERVIEWED 3,541 FLEET MANAGERS IN EUROPE BY PHONE IN MARCH 2019. 12 COUNTRIES PARTICIPATED IN THIS STUDY

This document presents the results of the 12 European countries (Turkey's results are presented in a separate document). All sectors of activity (construction, industry, service and trade) as well as all sizes of companies (from small companies with less than 10 employees to very large companies with more than 1,000 employees) are represented in this study. The representativeness of the sample is ensured by the method of quotas defined by country, company size and sector of activity.

12% of the companies surveyed manage a fleet of 100 or more vehicles (weighing less than 3.5 tonnes, i.e. including passenger coaches and LCVs).

#2

FLEET MANAGERS REMAIN OPTIMISTIC ABOUT THE GROWTH POTENTIAL OF THEIR FLEET SIZE BUT AT A SLIGHTLY LOWER LEVEL THAN IN 2018.

First observation: the largest companies are always the most optimistic.

We measure the level of confidence of companies concerning their fleets' growth potential through the Fleet Growth Potential indicator. This indicator is calculated from the difference between the share of companies that expect an increase in the size of their fleet minus the share of companies that expect a decrease in size. In 2019, this indicator stands at +11 for Europe as a whole (18% of companies expecting an increase compared to 7% expecting a decrease), a positive result but down by two points compared to 2018. This year, we find similar scores to 2015 to 2017 but still significantly higher than those recorded in 2012 (+5 points).

Observation by country also yields optimistic results: regardless of the country and size segment of the company observed (fewer than 100 employees, 100 or more employees), all results remain positive. The most optimistic countries are France, Luxembourg, Poland and Belgium; the least optimistic ones are Spain, Portugal and Italy.

#3

TAX MEASURES THAT BOOST THE DEVELOPMENT OF ALTERNATIVE

MAIN RESULTS - EUROPE

ENERGIES SUCH AS ELECTRIC, HYBRID AND PLUG-IN HYBRIDS FOR COMPANIES WITH 100 OR MORE EMPLOYEES.

More than half (55%) of companies with 100 or more employees reported that they already have or intend to integrate alternative energy vehicles into their fleet over the next 3 years. This potential grows from year to year: +11 points for full electric since 2015, +9 points for hybrid and +11 points for plug-in hybrids.

The countries with the highest development potential for these alternative energies are the United Kingdom, the Netherlands, Belgium, France and Germany. The lack of tax incentives based on the CO2 emission rate in the Czech Republic explains the country's latest position in terms of electricity deployment (which does not mean that this country does not implement actions to limit emissions from its fleets).

At the same time, we can see that the results of WLTP tests are increasingly taken into account in the context of the fleet policy: almost one company in two (47%) claims to take into account the results of this new test, an increase of 3 points compared to 2018, so,

unsurprisingly, the results are most taken into account within the largest companies (67%; +5 points against 2018). The results of these WLTP tests lead to a very concrete change in the level of vehicles purchased for 26% of companies.

The countries where WLTP tests are most taken into account are Belgium, the Netherlands, Portugal, France, Poland and Switzerland.

50% of companies told us they are taking concrete measures to reduce the amount of borrowing left by their vehicle fleets. These actions mainly concern CO2 (39%), but a significant proportion of companies (22% and 18% respectively) have also told us that they are seeking to reduce emissions of fine particles and NOx, even if it is not easy to quantify the emissions of the latter two pollutants.

The countries with the highest proportion of companies that have taken measures to limit CO2 emissions from their fleets are the United Kingdom, France, Belgium, Germany and Spain.

The process of reducing the share of diesel in company fleets is underway. When we ask fleet managers what they would do if car manufacturers were to offer

diesel vehicles tomorrow that emit no more NOx and fine particles than petrol vehicles, 34% tell us that they would still continue to reduce the share of diesel in their fleet, compared to only 4% who tell us that they would reverse and increase the share of diesel again.

#4

OPERATING LEASING, WIDELY ADOPTED BY THE LARGEST COMPANIES, IS DEVELOPING IN SMALL AND MEDIUM-SIZED COMPANIES.

The largest companies have understood that Operating Leasing meets their fleet management expectations. Almost half (47%) of companies with more than 100 employees use Operating Leasing as their main solution for financing their fleet vehicles (a rate that rises to 52% for very large companies).

All company size segments recorded an increase in Operating Leasing: + 5 points over the last 4 years for small and medium-sized companies as well as large and very large companies. This trend is expected to continue over the coming years, with 26% of

MAIN RESULTS - EUROPE

companies stating that they still intend to develop Operating Leasing, a figure up 3 points compared to the 2018 results.

Operating Leasing penetration among large and very large companies (more than 100 employees) is highest in Spain, the Netherlands and France. Germany, Luxembourg and also Spain have the highest penetration rates in terms of operating leases for small and medium-sized companies (fewer than 100 employees).

Note the case of Poland, which, despite limited penetration of Operating Leasing in the segment of companies with fewer than 100 employees (8% compared to 17% for the Europe average) has one of the highest development intentions.

#5

TELEMATICS TOOLS ARE SLOWLY BEING INSTALLED IN A CONTEXT OF GDPR DEPLOYMENT

At the beginning of 2019, there was a slight increase in telematics of +2 points compared to 2018: 21% of European companies

reported using telematics tools. This proportion rises to 32% among very large companies.

There are several groups of countries:

- Countries where telematics is already **well established** and is **developing quickly** compared to 2018: The Czech Republic, Spain and Portugal;
- Countries where telematics is **well established** but **has not progressed** compared to 2018: The United Kingdom, the Netherlands and Poland;
- Countries that are **small users of telematics but who expect to develop it**: Switzerland, Germany, Italy and Belgium.

To be noted:

- Telematics tools are more often used on LCVs than on cars (23% versus 18%);
- Three main functions are assigned to telematics tools: vehicle location, cost optimisation and driver safety enhancement.

#6

ALTERNATIVE MOBILITY SOLUTIONS

When we talk about car sharing or ride sharing, it becomes very difficult to compare the rate of use from one country to another

because we now have countries that already have access on the market to packaged and mature offers from leasers or service providers in the mobility sector and others not. The most mature countries associate car sharing or ride sharing with complete and packaged offers, while the less mature countries tell us that they practise car sharing as soon as a pool of cars parked in the yard is accessible to several people with a reservation system via an Outlook calendar for example (explanations given by a fleet manager in the Czech Republic).

This situation leads to the following oddity: countries like Czech Republic or Poland where there is no car sharing or ride sharing offer declare that they practise car sharing and ride sharing more often than countries such as the Netherlands or Belgium.

In order to avoid this problem of interpretation, it is better to look at the results of the question, 'Do you think these solutions could replace fleet vehicles now allocated by name?'

It should be noted that these are solutions that are beginning to be deployed or in the process of being deployed over the next 3 years and which would make it possible to replace fleet vehicles in large and very large companies (deployed + could replace fleet vehicles: 22%).

MAIN RESULTS - EUROPE

Countries where these solutions are most frequently deployed in companies with more than 100 employees (and where they are developing with a strong trend: France, the Netherlands and Germany.

Countries where these solutions are already in place for companies with more than 100 employees (with a potential to replace individually allocated fleet vehicles) but where they are not growing compared to last year: England, Switzerland and Belgium (cf. mapping analysis).

Countries where the penetration of these solutions is more limited and which do not record any particular progress or curiosity for these packaged and complete solutions: Italy, the Czech Republic, Poland, Portugal and Spain.

Mobility Budget and Private Lease solutions are attracting interest and curiosity from companies: 18% and 12% of companies respectively told us they have already tested or intend to implement them over the next three years. These rates even rise to 33% and 18% for very large companies. However, caution is required, fleet managers' rhetoric shows that this curiosity often translates into the testing of solutions developed in-house and that they do not necessarily have access to packaged offers of this type.



FLEET PROFILE

I

FLEET PROFILE

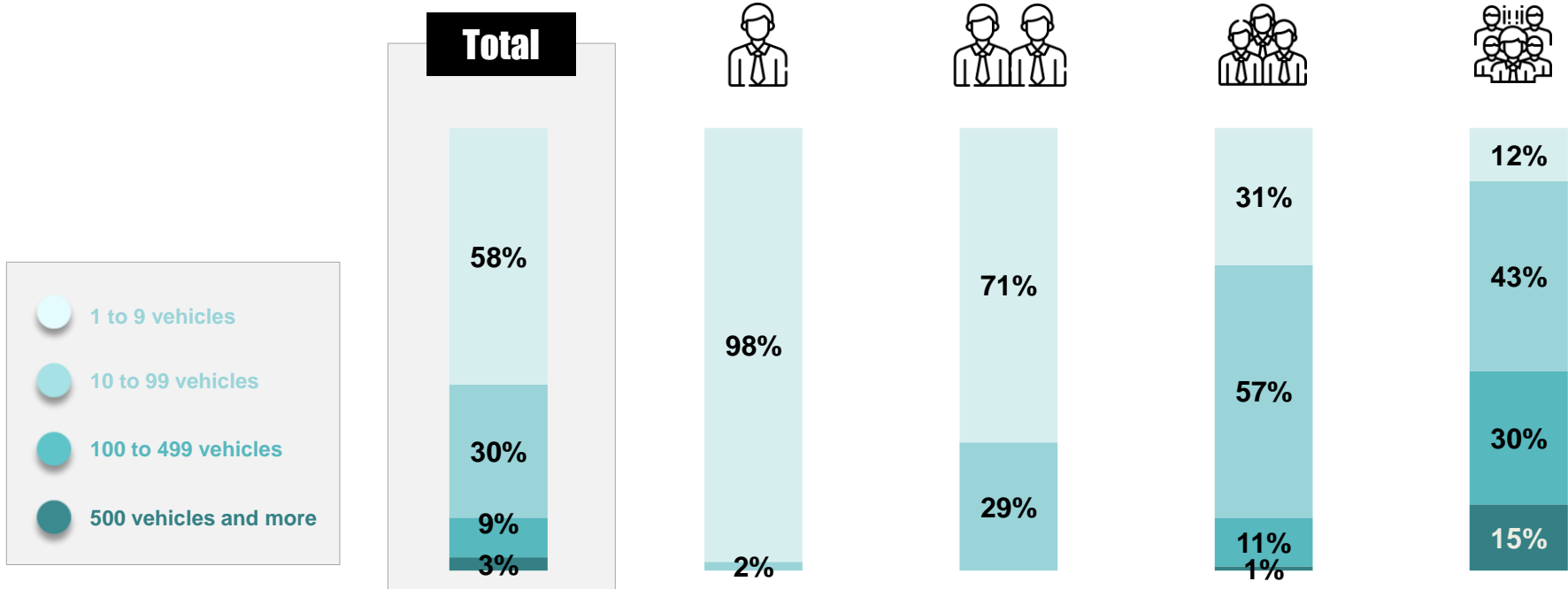
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FLEET CHARACTERISTICS

NUMBER OF VEHICLES IN FLEET

A5. Can you please tell me the total number of vehicles of less than 3.5 tons in your fleet?

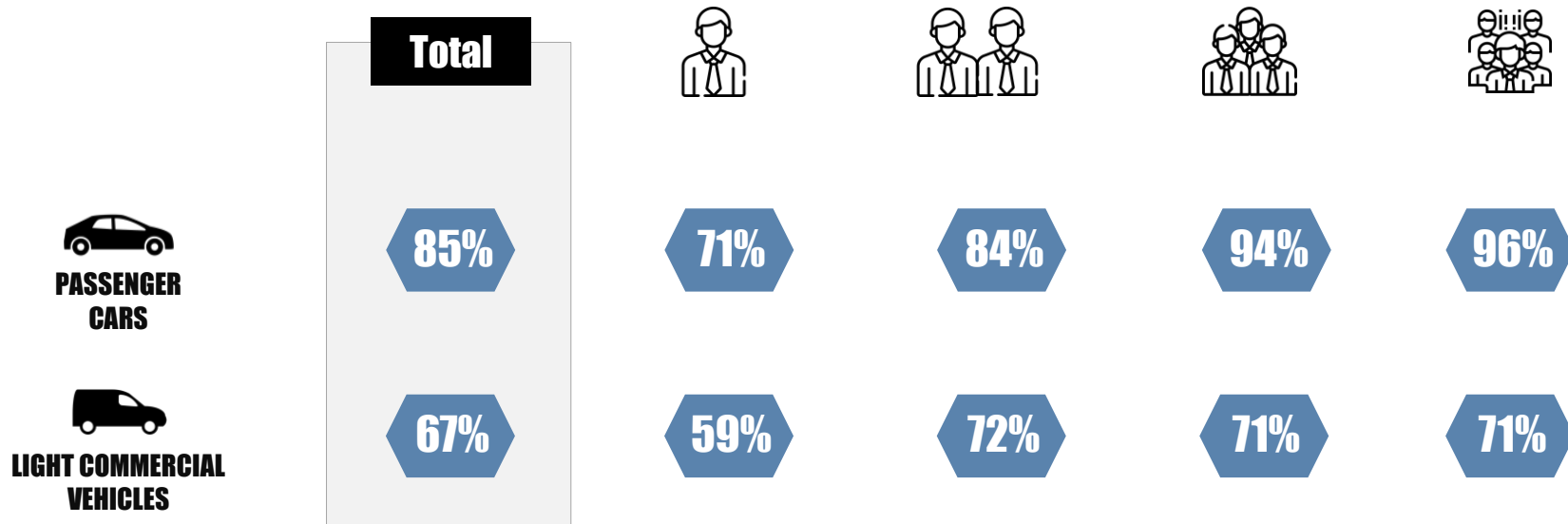
Basis: companies with corporate vehicles = 100%



PROPORTION OF COMPANIES WITH AT LEAST ONE CAR OR ONE LCVS (among companies with at least one vehicle in fleet)














A5f. And can you please tell me the total number of LCVs or Vans in your fleet?

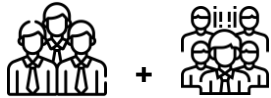
Basis: companies with corporate vehicles = 100%
















NUMBER OF VEHICLES IN FLEET



													
	EU	FR	IT	UK	NL	ES	BE	CZ	DE	PL	PT	CH	LU
1 to 9 vehicles	88%	83%	98%	85%	88%	87%	79%	88%	92%	89%	89%	92%	85%
10 to 99 vehicles	12%	17%	2%	14%	12%	13%	21%	13%	8%	11%	11%	8%	15%
100 to 499 vehicles	< 1%	-	-	1%	-	-	-	-	-	-	-	-	-



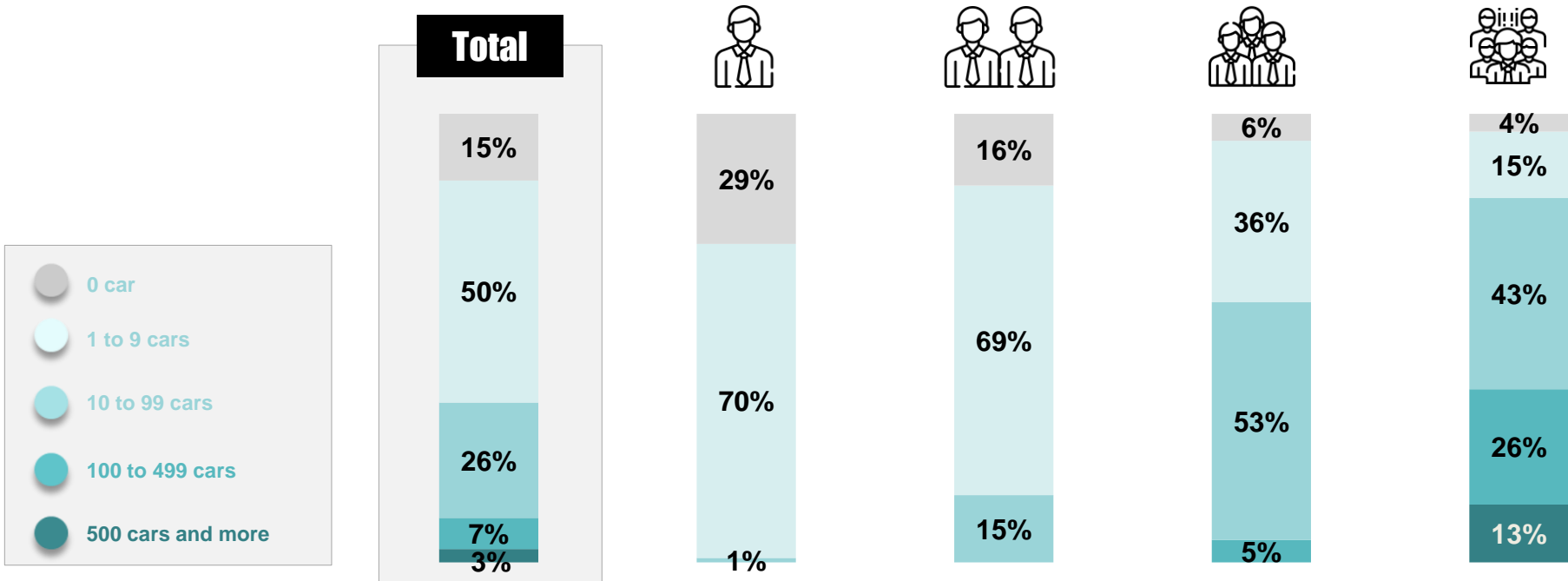
													
1 to 9 vehicles	23%	16%	49%	26%	12%	16%	11%	23%	14%	39%	26%	31%	15%
10 to 99 vehicles	51%	44%	41%	41%	45%	50%	47%	69%	58%	50%	54%	53%	58%
100 to 499 vehicles	19%	21%	9%	21%	33%	27%	29%	6%	20%	10%	17%	13%	24%
500 vehicles and more	7%	19%	-	12%	10%	7%	13%	1%	8%	1%	2%	3%	2%



NUMBER OF CARS IN FLEET

A5f_1. And can you please tell me the total number of cars in your fleet?

Basis: companies with corporate vehicles = 100%





NUMBER OF CARS IN FLEET



EU

FR

IT

UK

NL

ES

BE

CZ

DE

PL

CH

LU

0 vehicle

24%

36%

45%

41%

29%

31%

21%

3%

8%

20%

19%

13%

1 to 9 vehicles

70%

58%

54%

55%

67%

61%

66%

89%

87%

76%

77%

77%

10 to 99 vehicles

6%

7%

<1%

3%

4%

8%

13%

8%

5%

4%

4%

9%

100-499 vehicles

<1%

-

-

1%

-

-

-

-

-

-

-

-

500 and more

<1%

-

-

-

-

-

-

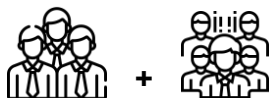
-

-

1%

-

-



0 vehicle

5%

2%

13%

11%

3%

6%

4%

1%

-

6%

3%

6%

1 to 9 vehicles

27%

21%

50%

29%

14%

22%

11%

29%

24%

44%

38%

16%

10 to 99 vehicles

48%

47%

30%

36%

46%

48%

51%

67%

53%

41%

49%

62%

100-499

14%

16%

7%

15%

28%

18%

24%

2%

18%

7%

7%

15%

500 and more

6%

14%

-

9%

9%

6%

11%

1%

6%

1%

3%

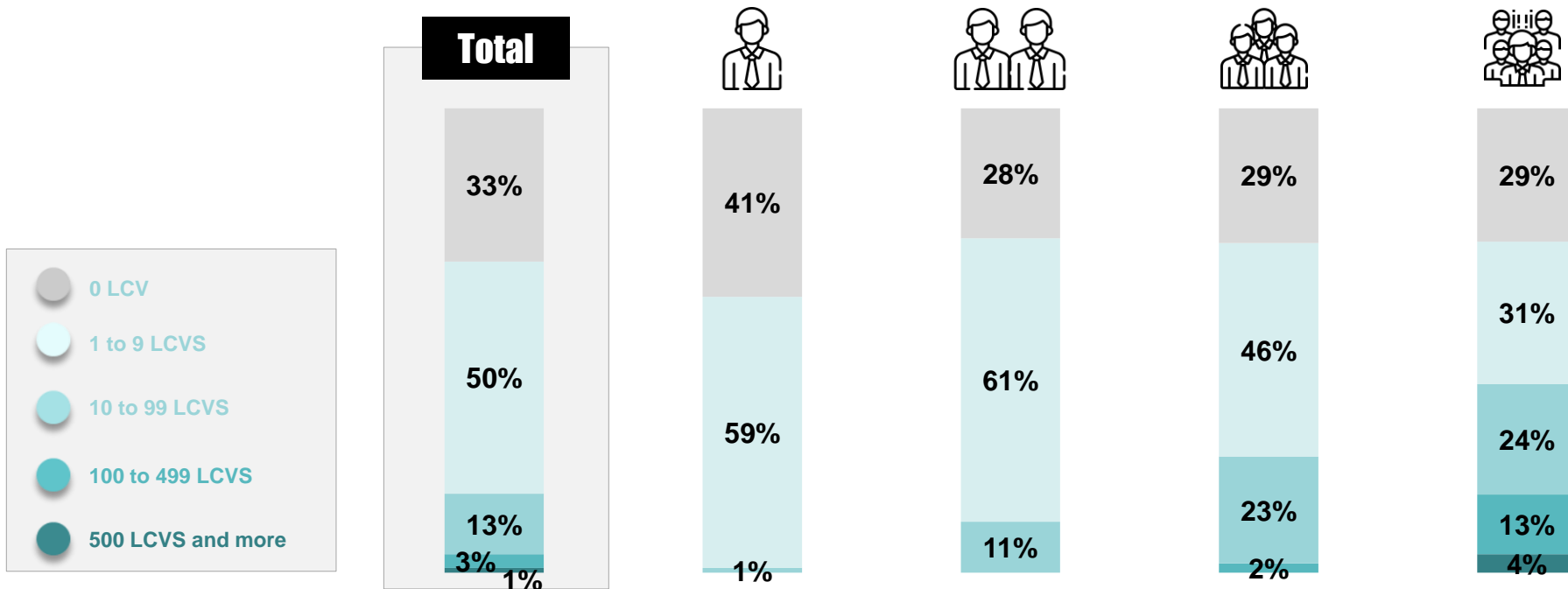
1%



NUMBER OF LCVS IN FLEET

A5f_2. 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



EU

FR

IT

UK

NL

ES

BE

CZ

DE

PL

CH

LU

0 vehicle

36%

13%

28%

23%

34%

28%

42%

53%

45%

34%

37%

59%

1 to 9 vehicles

60%

78%

71%

70%

59%

68%

53%

46%

52%

63%

59%

36%

10 to 99 vehicles

4%

9%

1%

6%

6%

4%

5%

1%

3%

3%

4%

5%

100-499 vehicles

< 1%

-

-

1%

-

-

-

-

-

-

-

-

500 and more

< 1%

-

-

1%

-

-

-

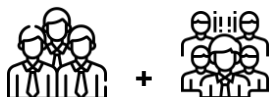
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0 vehicle

29%

19%

37%

20%

37%

31%

45%

25%

25%

22%

23%

34%

1 to 9 vehicles

39%

33%

40%

36%

33%

32%

29%

44%

48%

59%

43%

36%

10 to 99 vehicles

23%

29%

23%

23%

21%

23%

19%

29%

21%

16%

27%

25%

100-499

7%

12%

1%

17%

6%

11%

6%

2%

3%

1%

7%

6%

500 and more

2%

6%

-

3%

2%

2%

1%

-

3%

1%

-

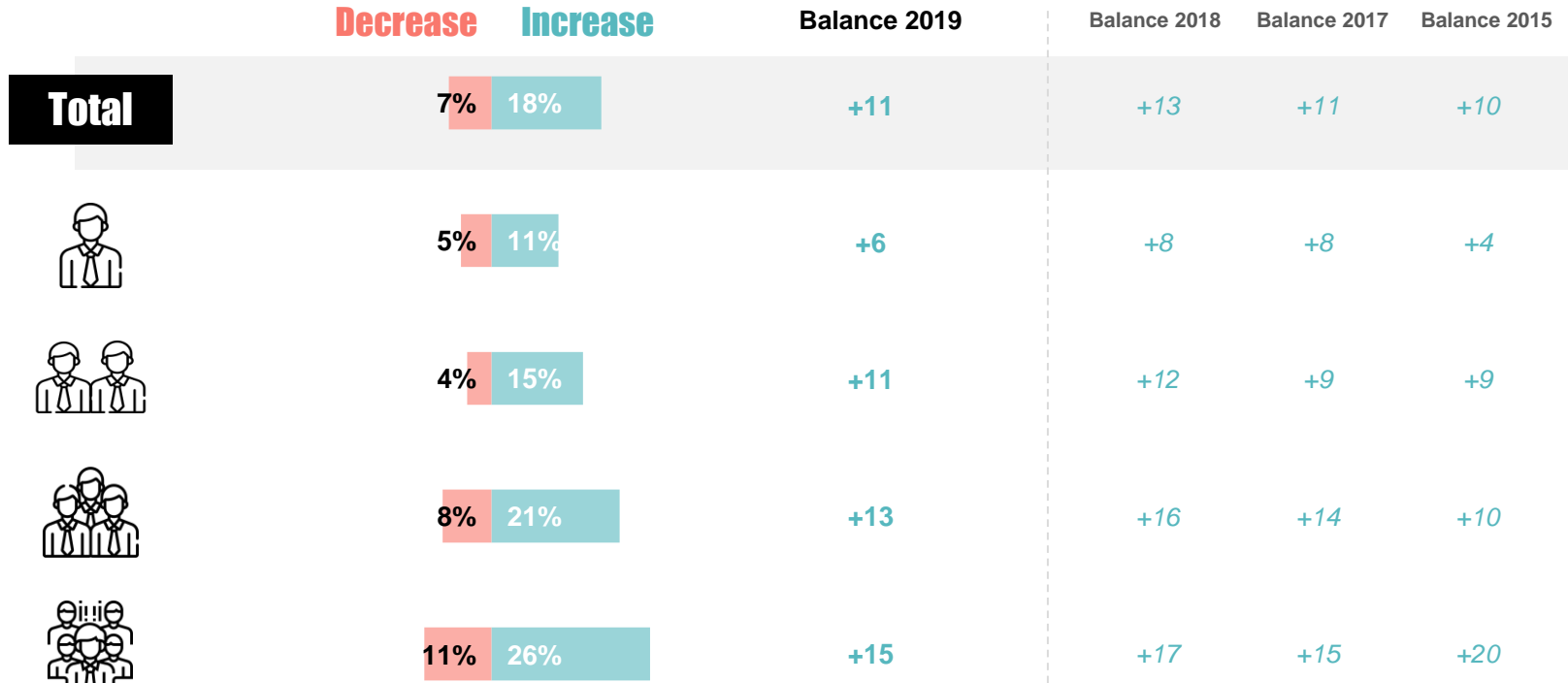
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FLEET GROWTH POTENTIAL

A8. In the next three years, do you think that the total number of vehicles in your company fleet will?

Basis: companies with corporate vehicles = 100%

% which think that the total number of vehicles of their company fleet will increase or decrease



Balance = Fleet growth will increase – Fleet growth will decrease

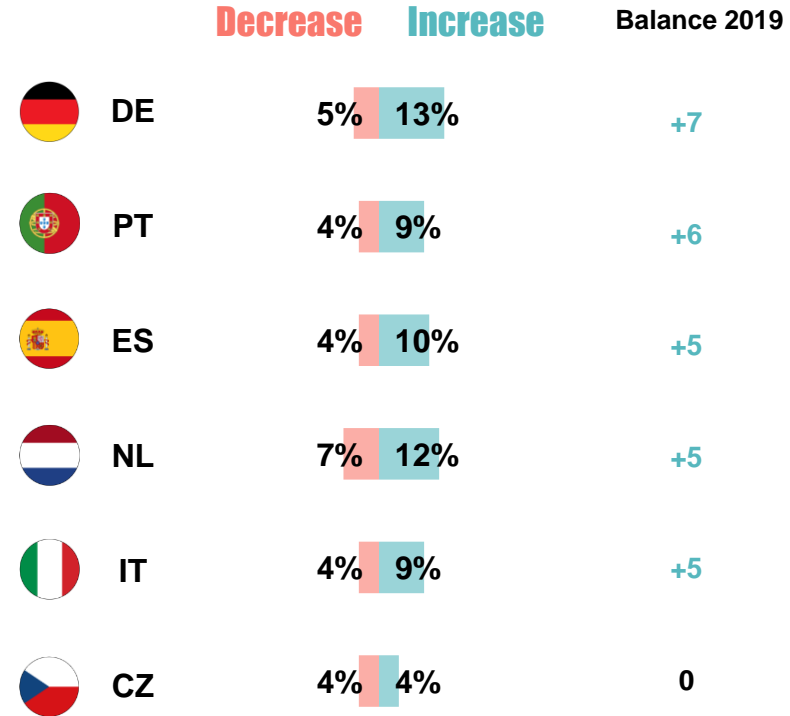
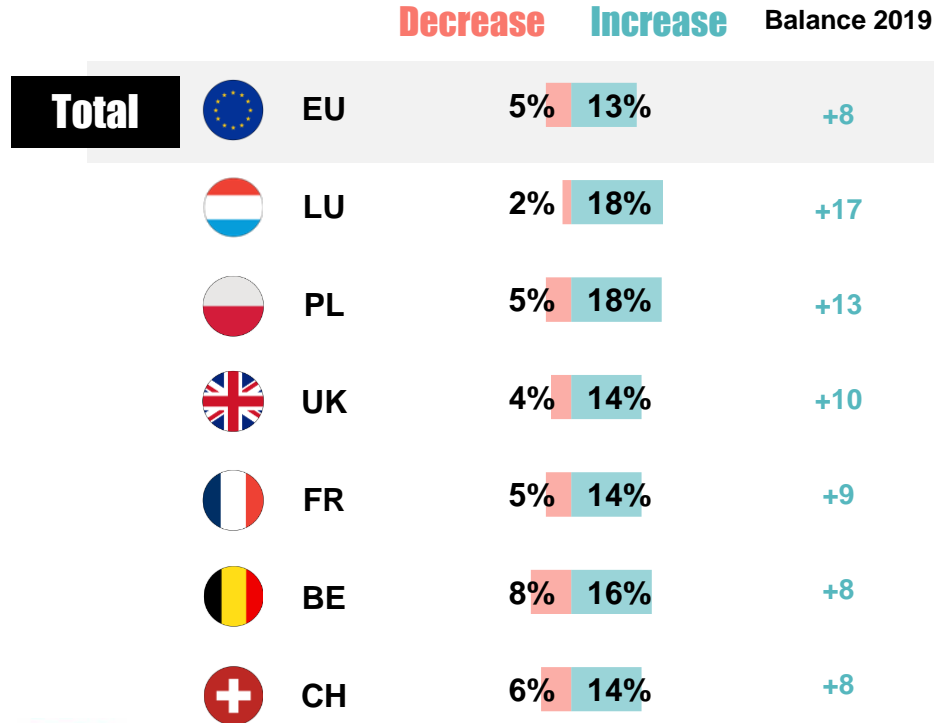
FLEET GROWTH POTENTIAL

by company size



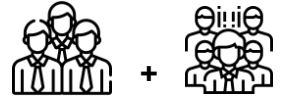
A8. In the next three years, do you think that the total number of vehicles in your company fleet will?
 Basis: companies with corporate vehicles = 100%

% which think that the total number of vehicles of their company fleet will increase or decrease



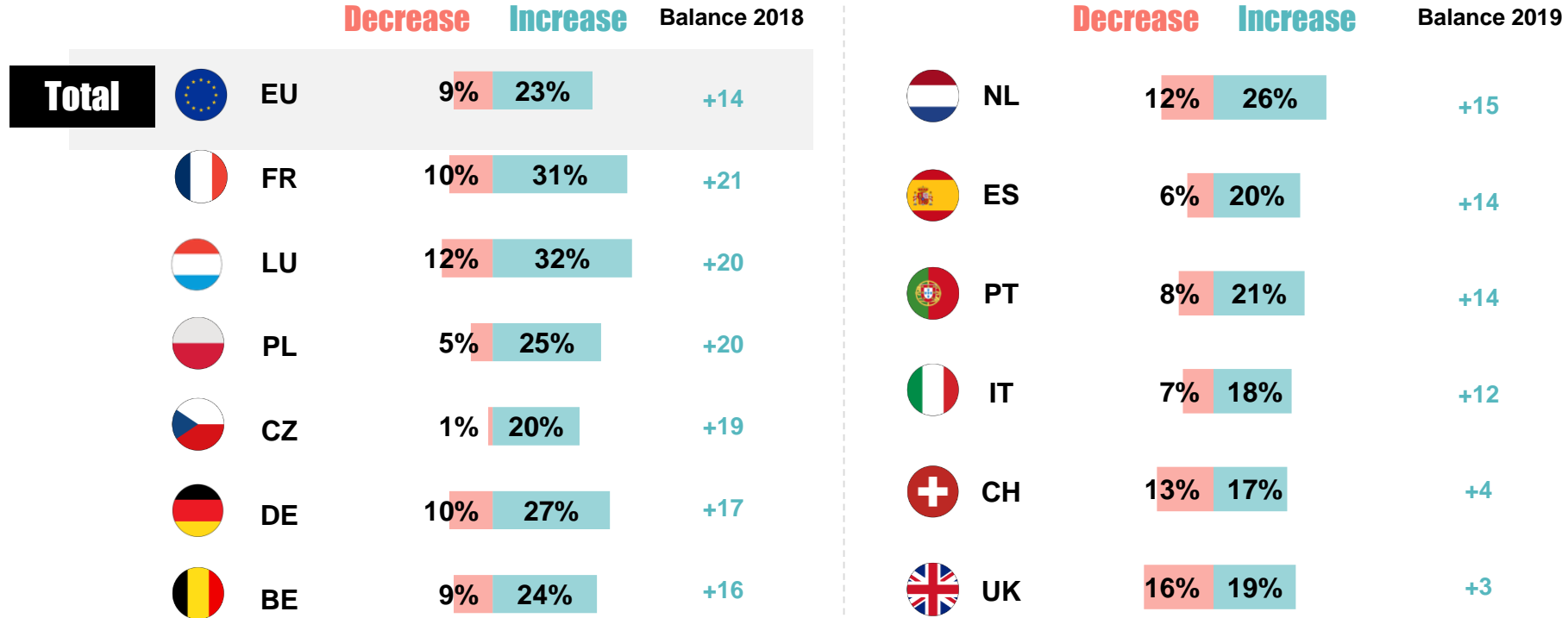
FLEET GROWTH POTENTIAL

by company size



A8. In the next three years, do you think that the total number of vehicles in your company fleet will?
 Basis: companies with corporate vehicles = 100%

% which think that the total number of vehicles of their company fleet will increase or decrease

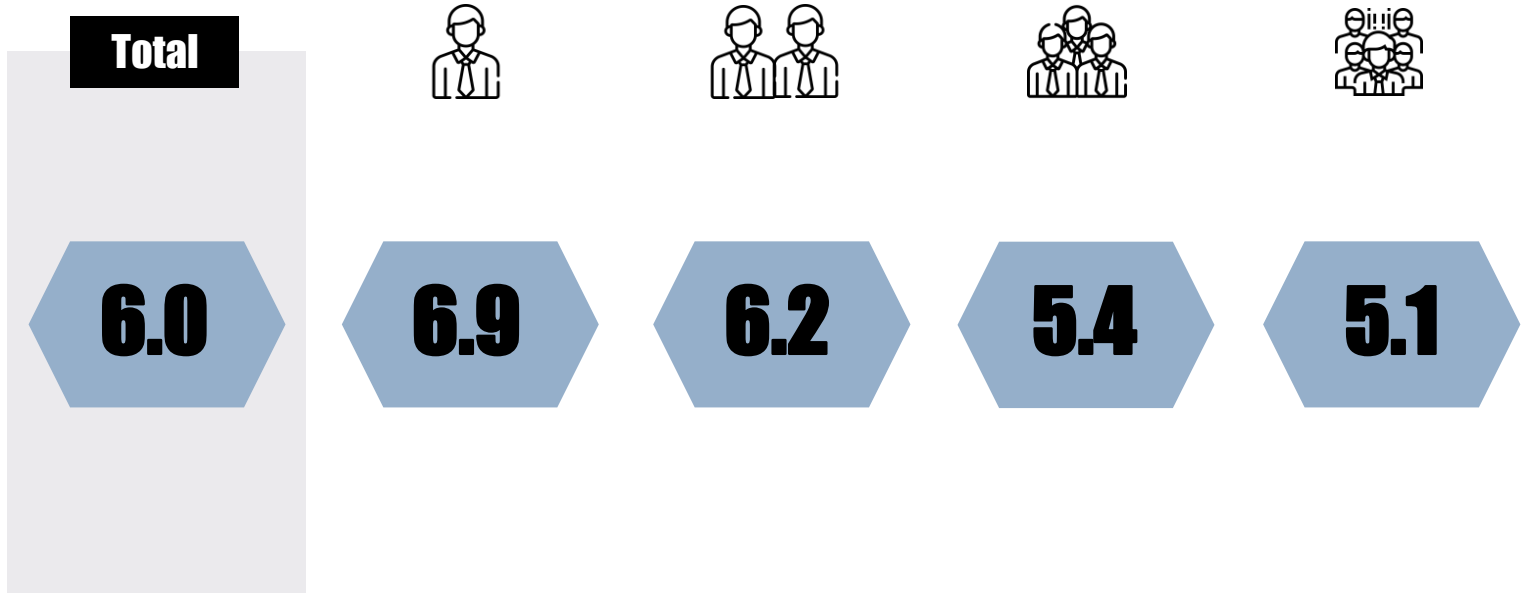


Balance = Fleet growth will increase – Fleet growth will decrease

HOW LONG DO COMPANIES KEEP THEIR VEHICLES?

A25. 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%

AVERAGE IN YEARS



HOW LONG DO COMPANIES KEEP THEIR VEHICLES?


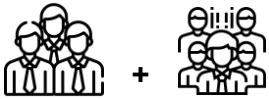
by company size

A25. 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%

AVERAGE IN YEARS



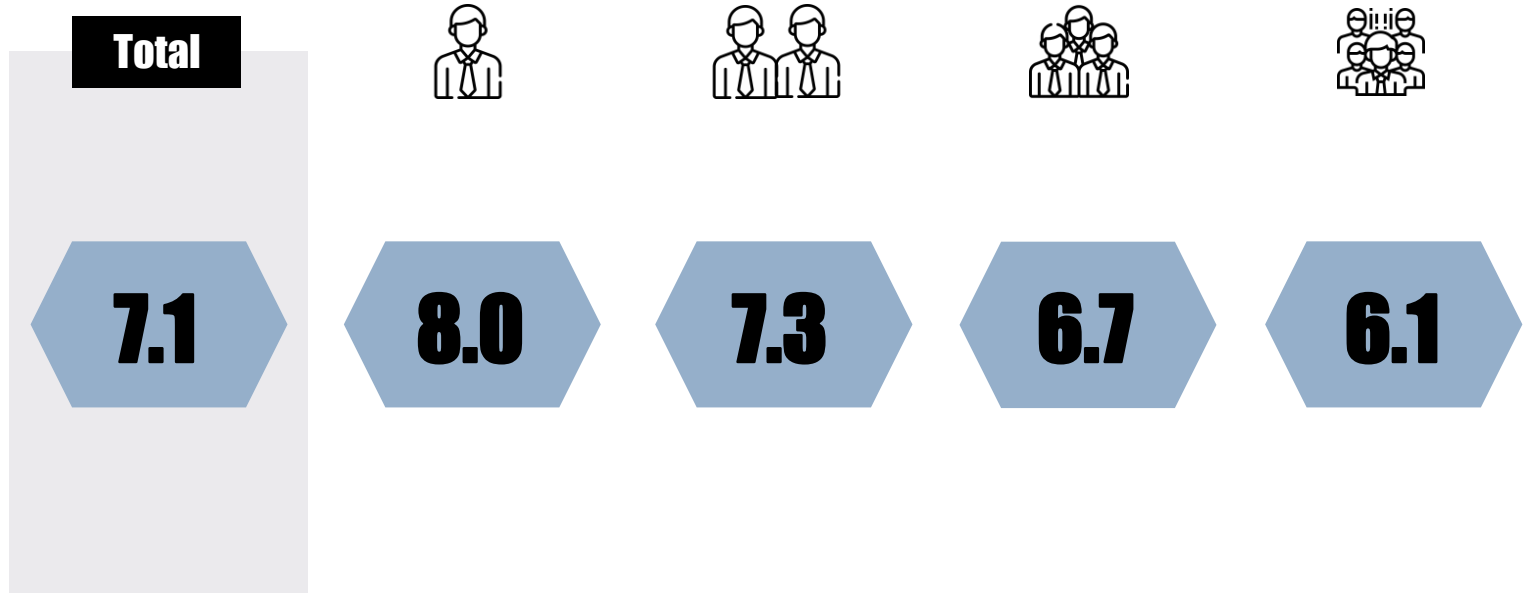
	EU	FR	IT	UK	NL	ES	BE	CZ	DE	PL	PT	CH	LU
Total	6.0	5.3	7.6	5.0	5.0	6.4	5.3	6.1	4.5	6.9	7.5	7.6	4.8
	6.7	6.7	9.1	5.6	5.5	8.1	6.0	6.3	5.0	6.8	8.2	8.0	4.7
	5.3	3.8	5.8	4.3	4.5	4.4	4.5	5.9	4.0	7.0	6.7	7.1	4.9



HOW LONG DO COMPANIES KEEP THEIR LCVS?

A25b. 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%

AVERAGE IN YEARS





HOW LONG DO COMPANIES KEEP THEIR LCVS?

A25b. 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%

AVERAGE IN YEARS



	EU	FR	IT	UK	NL	ES	BE	CZ	DE	PL	PT	CH	LU
Total	7.1	6.5	8.6	5.9	5.9	7.1	6.3	6.9	5.8	8.0	7.8	9.0	6.7
	7.7	7.6	9.8	6.3	6.3	8.9	7.0	7.3	6.0	7.8	8.5	9.0	6.8
	6.4	5.2	6.9	5.6	5.4	5.0	5.5	6.6	5.6	8.2	7.1	9.1	6.6

I

FLEET PROFILE

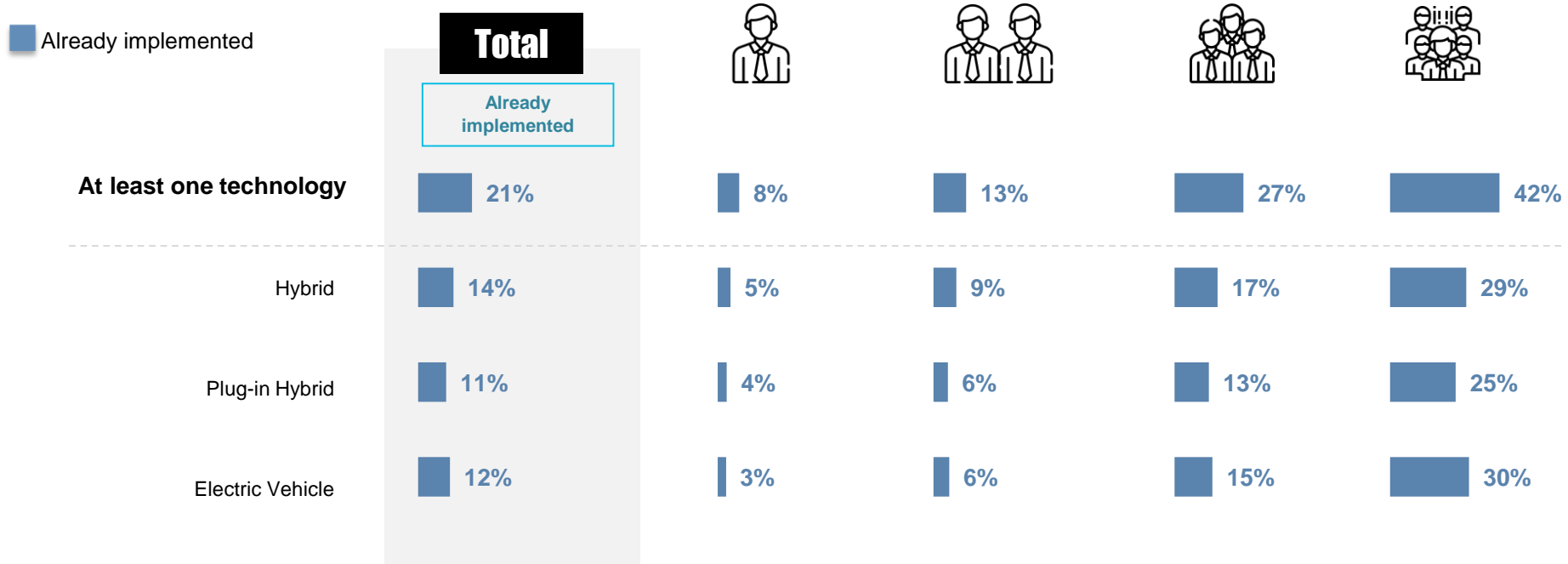
B

CURRENT ENERGIES

USE OF ELECTRIC AND HYBRID TECHNOLOGIES

E28. Amongst the following technologies, which ones do you use or are you considering using? Already Implemented.
 Basis: companies with corporate vehicles = 100%

Proportion of companies having already implemented new energies or technologies in their fleet

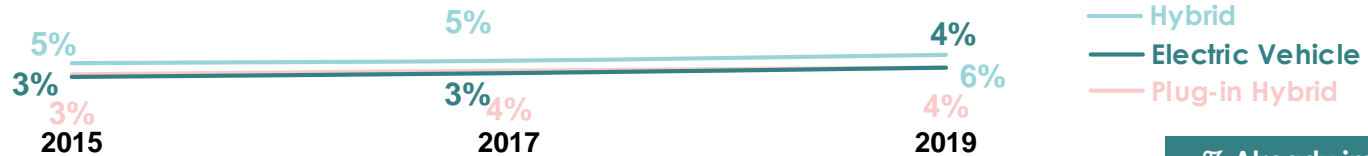


USE OF ELECTRIC AND HYBRID TECHNOLOGIES

E28. Amongst the following technologies, which ones do you use or are you considering using? Already Implemented.

Basis: companies with corporate vehicles = 100%

Proportion of companies having already or considering to implement in the next 3 years new energies or technologies in their fleet

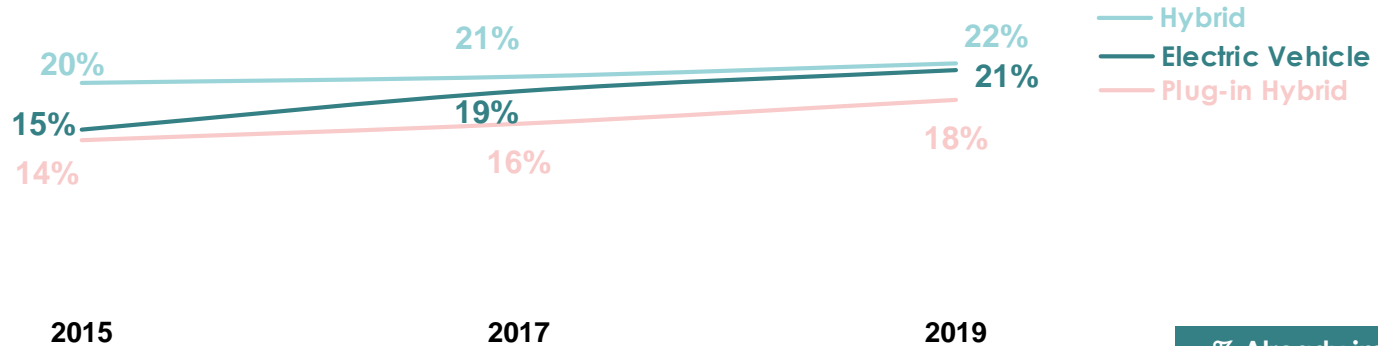


USE OF ELECTRIC AND HYBRID TECHNOLOGIES

E28. Amongst the following technologies, which ones do you use or are you considering using? Already Implemented.

Basis: companies with corporate vehicles = 100%

Proportion of companies having already or considering to implement in the next 3 years new energies or technologies in their fleet



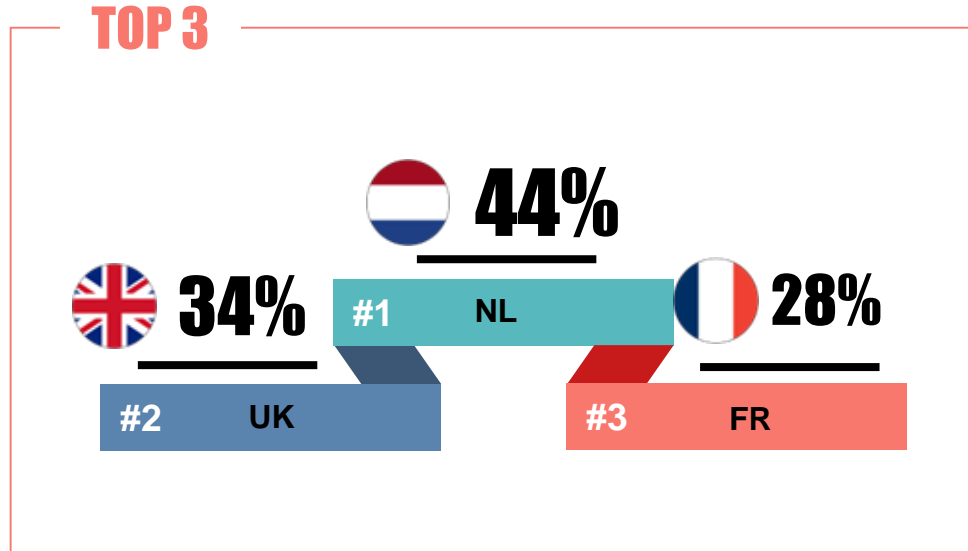
USE OF ELECTRIC AND HYBRID TECHNOLOGIES

AT LEAST ELECTRIC - HYBRID OR PLUG-IN HYBRID

E28. Amongst the following technologies, which ones do you use or are you considering using? Already Implemented.
Basis: companies with corporate vehicles = 100%

Proportion of companies having already implemented new energies or technologies in their fleet (hybrid, plug-in hybrid or electric vehicle)

% Already implemented



USE OF HYBRID AND PLUG-IN HYBRID TECHNOLOGIES

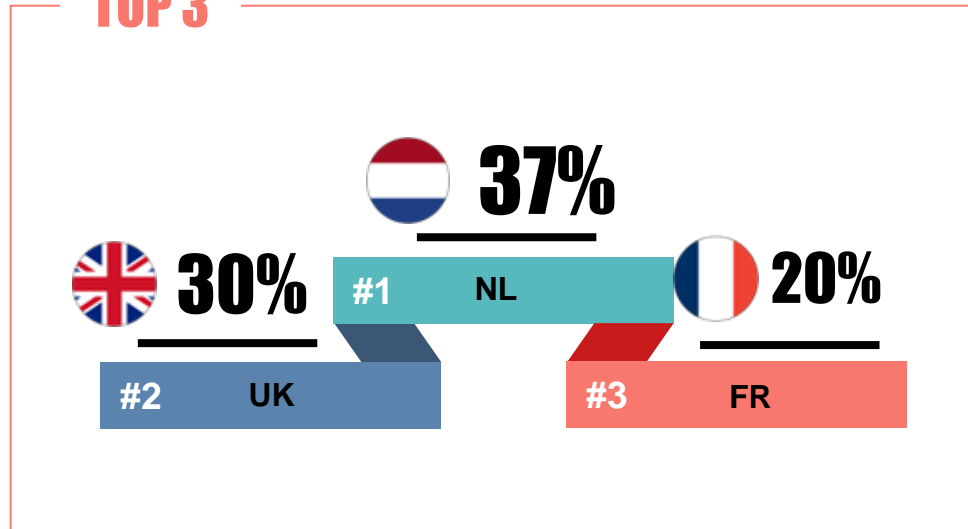
E28. Amongst the following technologies, which ones do you use or are you considering using? Already Implemented.
Basis: companies with corporate vehicles = 100%

Proportion of companies having already or considering to implement hybrid and plug-in hybrid technology

% Already implemented



TOP 3



USE OF PLUG-IN HYBRID TECHNOLOGIES

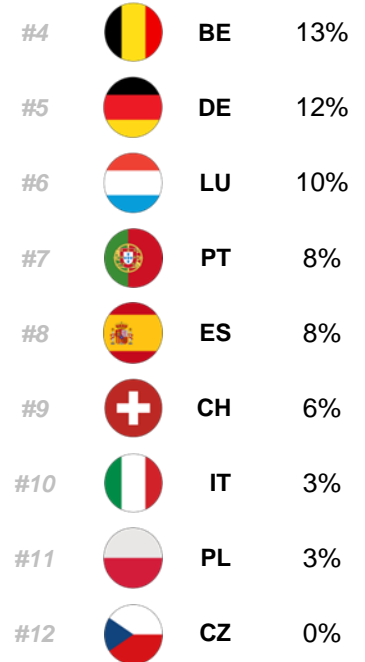
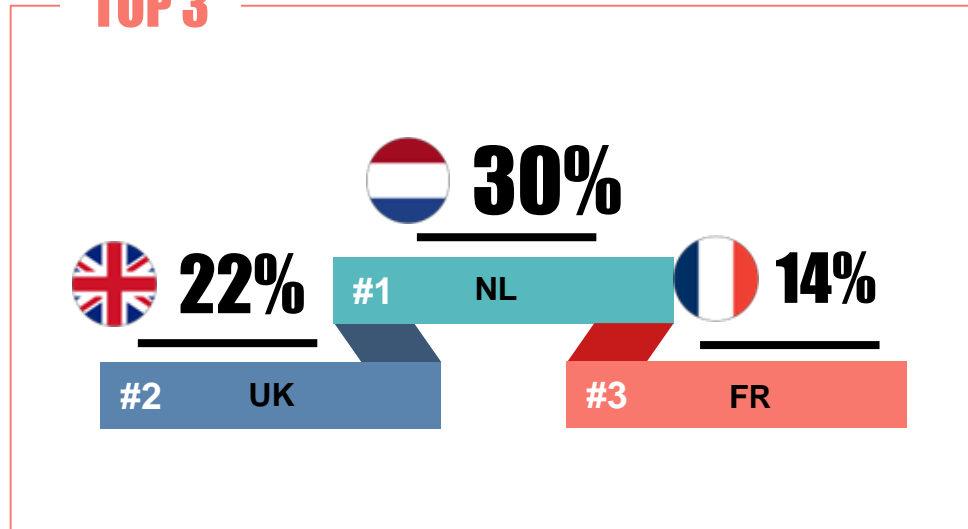
E28. Amongst the following technologies, which ones do you use or are you considering using? Already Implemented.
Basis: companies with corporate vehicles = 100%

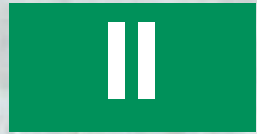
Proportion of companies having already implemented plug-in hybrid technology

% Already implemented



TOP 3

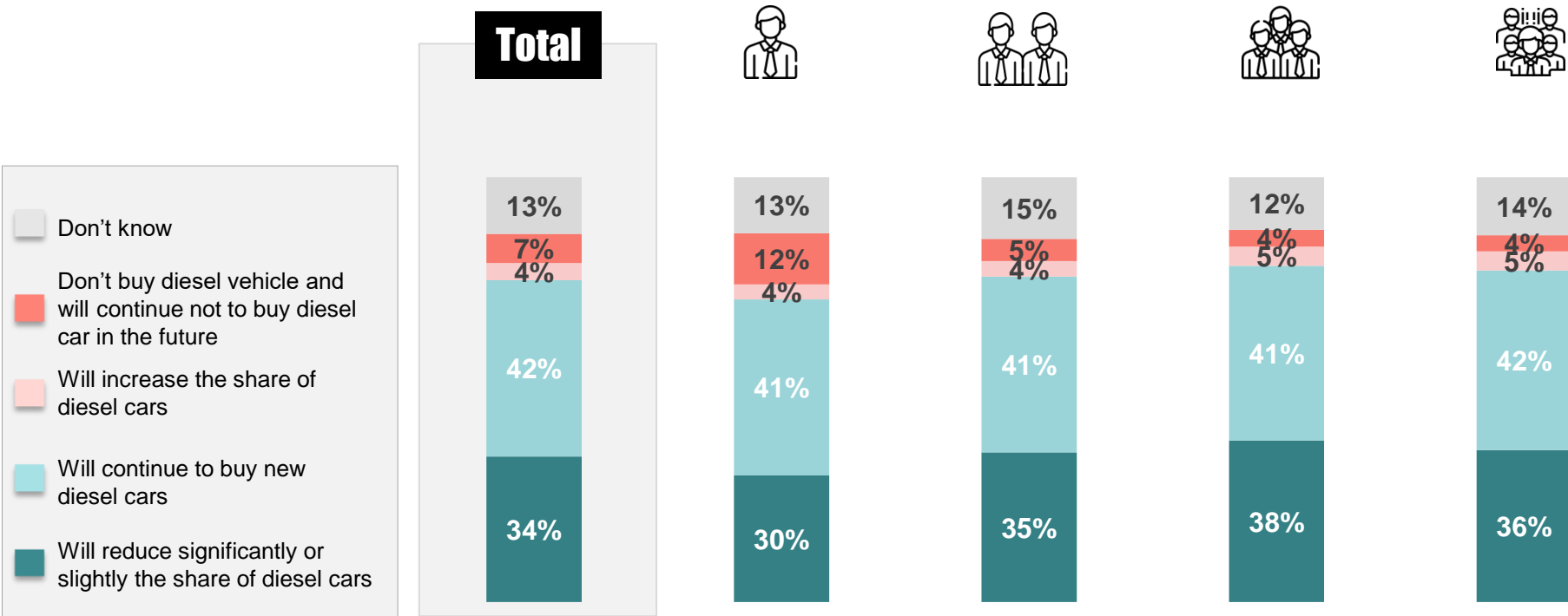




ENERGIES MIX EXPECTED

DIESEL PURCHASE BEHAVIOUR IN CASE OF EQUIVALENT LEVELS OF EMISSIONS BETWEEN DIESEL AND PETROL CARS

NL20a. If car makers were to produce diesel vehicles with equivalent levels of emissions as petrol cars in terms of NOx and fine particles, what would your company do in the coming years?
 Basis: companies with corporate vehicles = 100%

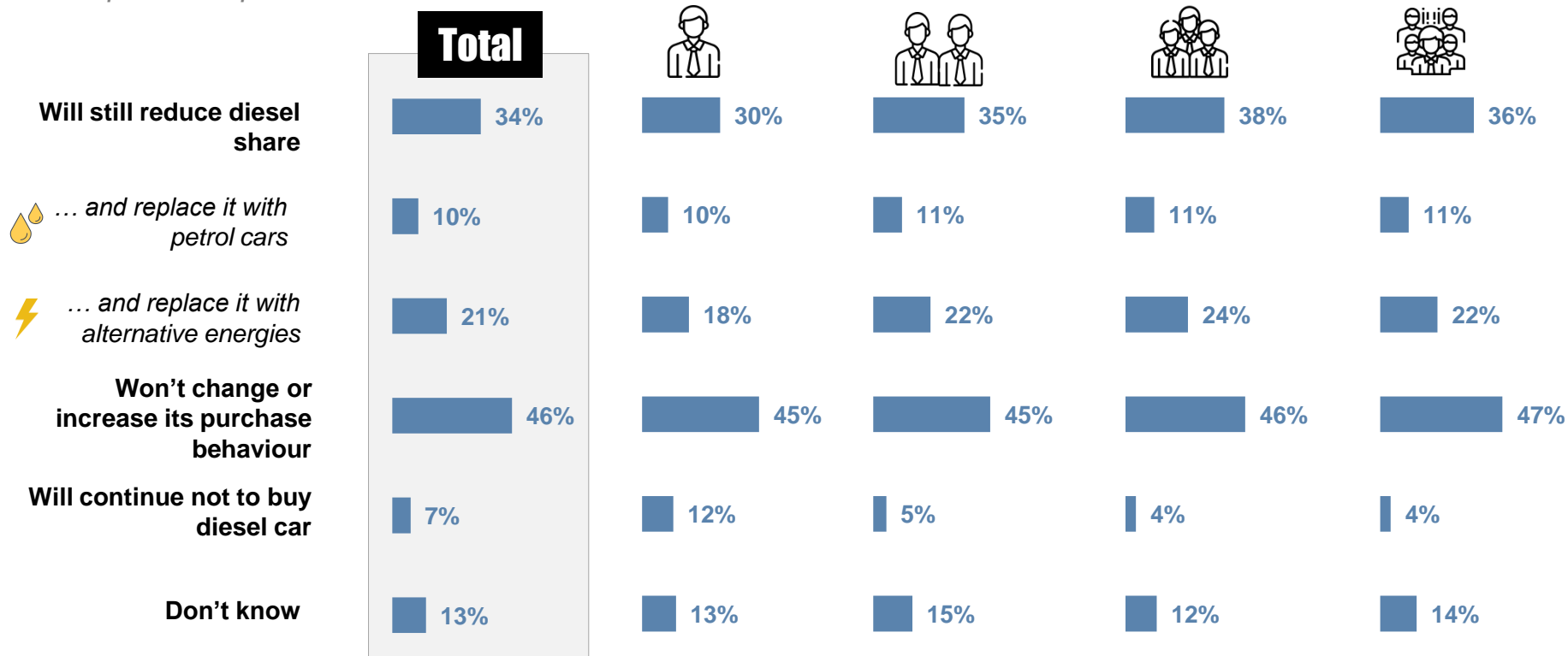


DIESEL PURCHASE BEHAVIOUR IN CASE OF EQUIVALENT LEVELS OF EMISSIONS BETWEEN DIESEL AND PETROL CARS

NL20a. If car makers were to produce diesel vehicles with equivalent levels of emissions as petrol cars in terms of NOx and fine particles, what would your company do in the coming years?

NL20b. And in this case, do you think your company will replace diesel cars with...

Basis: companies with corporate vehicles = 100%



DIESEL PURCHASE BEHAVIOUR IN CASE OF EQUIVALENT LEVELS OF EMISSIONS BETWEEN DIESEL AND PETROL CARS



EU

FR

UK

NL

ES

BE

CZ

DE

PL

CH

LU

Will still reduce diesel share

32%

44%

25%

30%

43%

39%

11%

32%

27%

38%

32%

... and replace it with petrol cars

10%

11%

5%

7%

10%

12%

9%

12%

15%

13%

9%

... and replace it with alternative energies

20%

32%

18%

20%

30%

24%

2%

18%

10%

23%

21%

Won't change or expect to increase diesel share

45%

54%

49%

33%

40%

42%

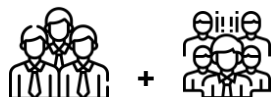
53%

54%

44%

31%

47%



Will still reduce diesel share

37%

53%

33%

39%

40%

40%

21%

35%

39%

41%

32%

... and replace it with petrol cars

11%

14%

4%

13%

4%

11%

13%

10%

19%

9%

14%

... and replace it with alternative energies

23%

34%

25%

21%

33%

24%

6%

23%

14%

30%

18%

Won't change or expect to increase diesel share

46%

44%

49%

32%

45%

37%

56%

59%

40%

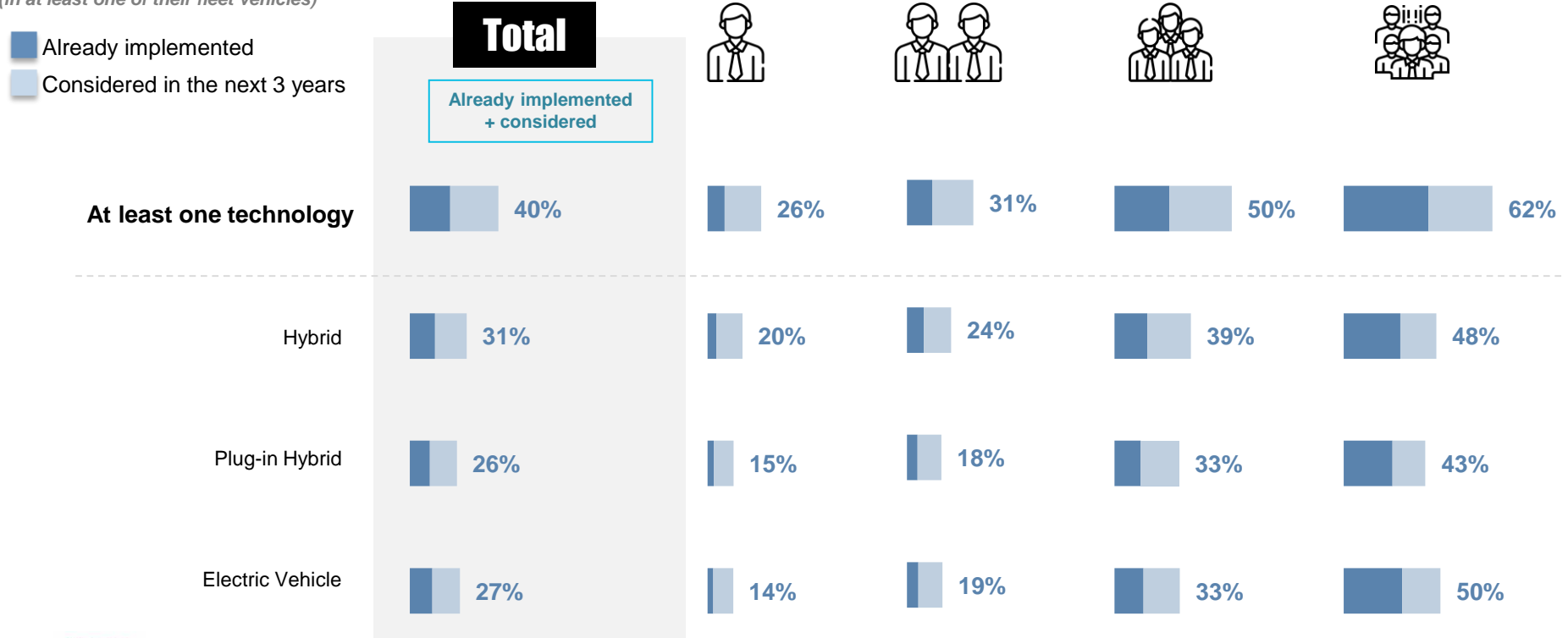
44%

53%

DEVELOPMENT POTENTIAL OF ELECTRIC AND HYBRID ENERGIES

E28. 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 considered. **Basis: companies with corporate vehicles = 100%**

Proportion of companies having already or considering to implement in the next 3 years new energies or technologies in their fleet (in at least one of their fleet vehicles)



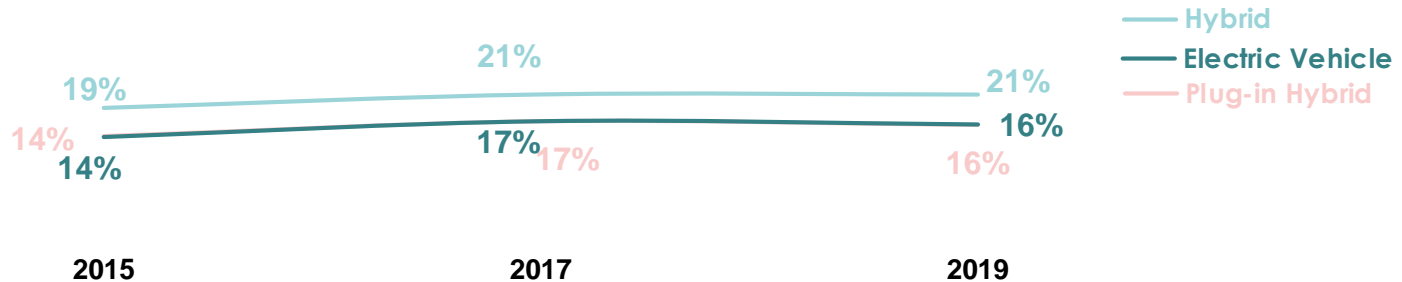
DEVELOPMENT POTENTIAL OF HYBRID AND ELECTRIC ENERGIES

E28. Amongst the following 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 considered. **Basis: companies with corporate vehicles = 100%**

Proportion of companies having already or considering to implement in the next 3 years new energies or technologies in their fleet



**% Already implemented +
considered in the next 3 years**



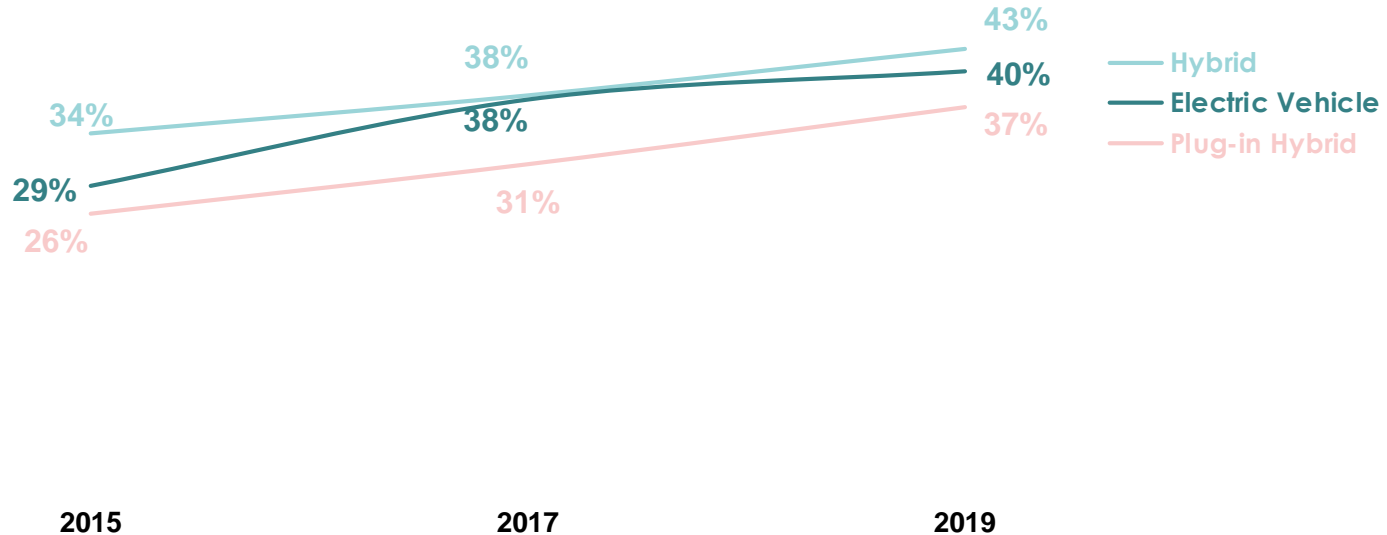
DEVELOPMENT POTENTIAL OF HYBRID AND ELECTRIC ENERGIES

E28. Amongst the following 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 considered. **Basis: companies with corporate vehicles = 100%**

Proportion of companies having already or considering to implement in the next 3 years new energies or technologies in their fleet



**% Already implemented +
considered in the next 3 years**

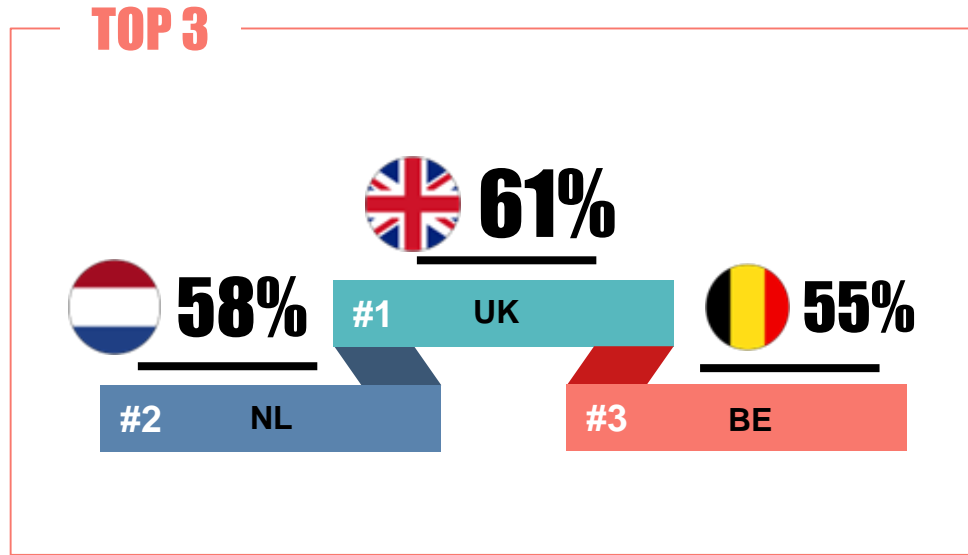


DEVELOPMENT POTENTIAL OF ELECTRIC AND HYBRID AT LEAST ELECTRIC - HYBRID OR PLUG-IN HYBRID

E28. Amongst the following 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 considered. **Basis: companies with corporate vehicles = 100%**

Proportion of companies having already or considering to implement in the next 3 years new energies or technologies in their fleet (hybrid, plug-in hybrid or electric vehicle)

% Already implemented + considered in the next 3 years



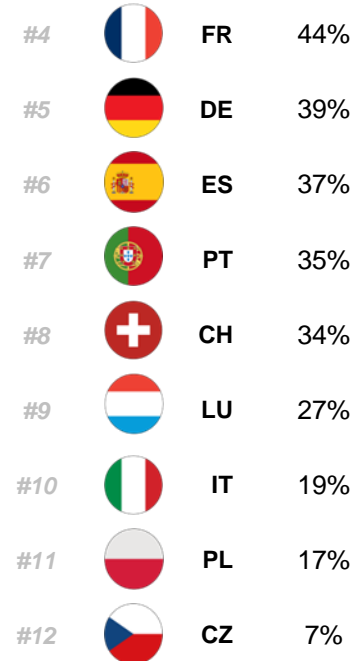
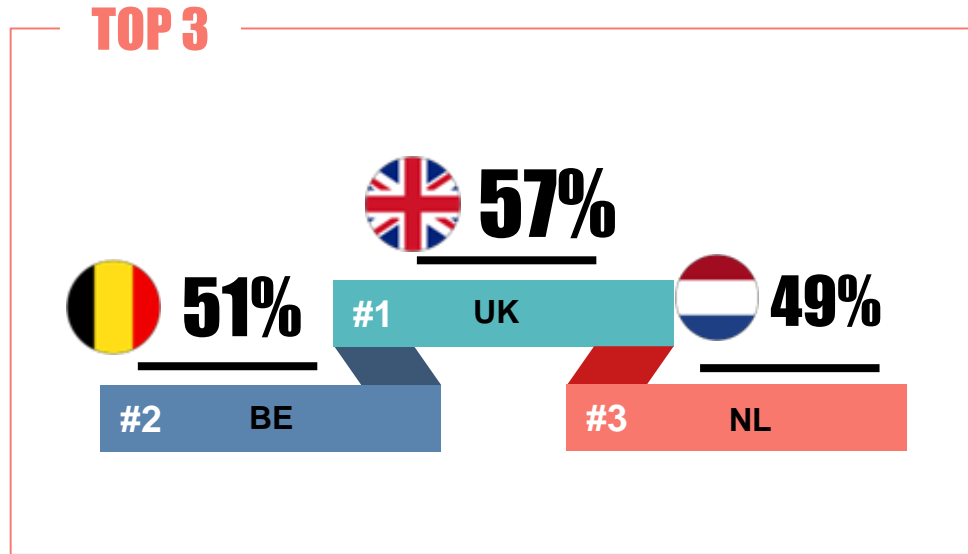
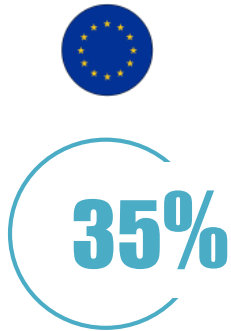
#4		FR	51%
#5		DE	47%
#6		CH	45%
#7		PT	43%
#8		ES	41%
#9		LU	31%
#10		IT	23%
#11		PL	19%
#12		CZ	10%

DEVELOPMENT POTENTIAL OF HYBRID AND PLUG-IN HYBRID

E28. Amongst the following 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 considered. **Basis: companies with corporate vehicles = 100%**

Proportion of companies having already or considering to implement in the next 3 years hybrid or plug-in hybrid technology in their fleet

% Already implemented + considered in the next 3 years

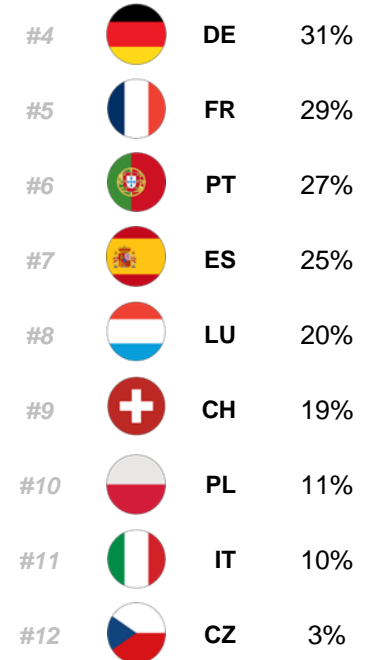
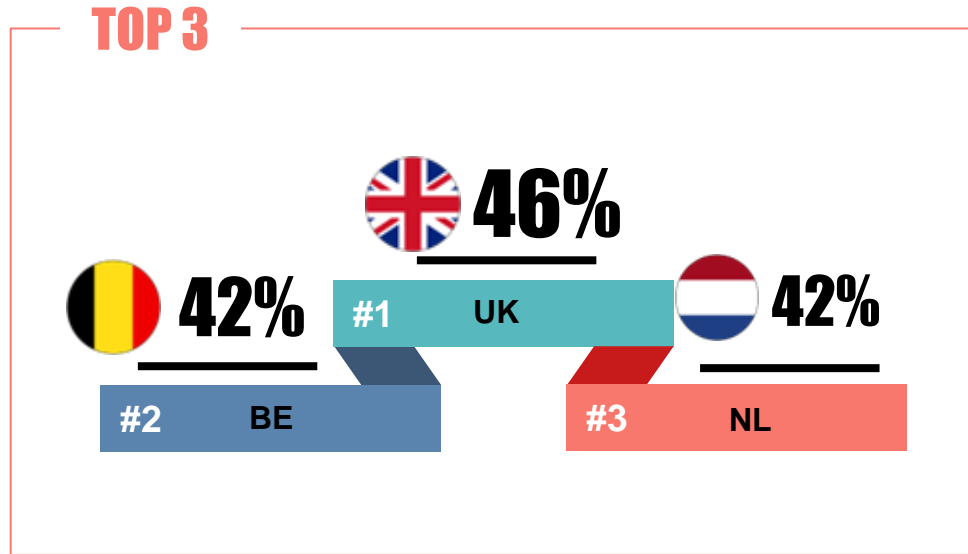


DEVELOPMENT POTENTIAL OF PLUG-IN HYBRID

E28. Amongst the following 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 considered. **Basis: companies with corporate vehicles = 100%**

Proportion of companies having already or considering to implement in the next 3 years Plug-in hybrid technology in their fleet

% Already implemented + considered in the next 3 years



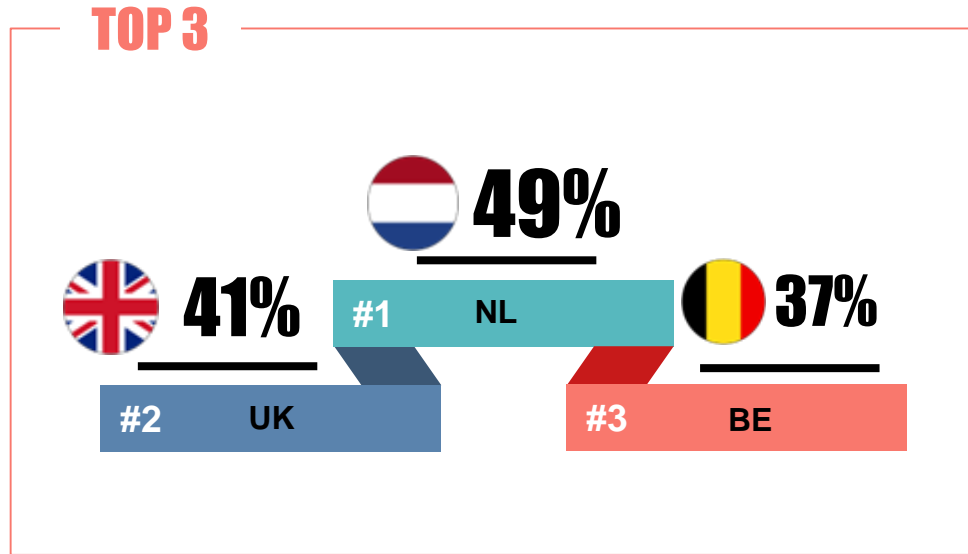
DEVELOPMENT POTENTIAL OF ELECTRIC VEHICLE




FULL ELECTRIC

E28. Amongst the following 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 considered. **Basis: companies with corporate vehicles = 100%**

Proportion of companies having already or considering to implement in the next 3 years electric vehicle (excluding hybrid and plug-in hybrid technologies) in their fleet

% Already implemented + considered in the next 3 years



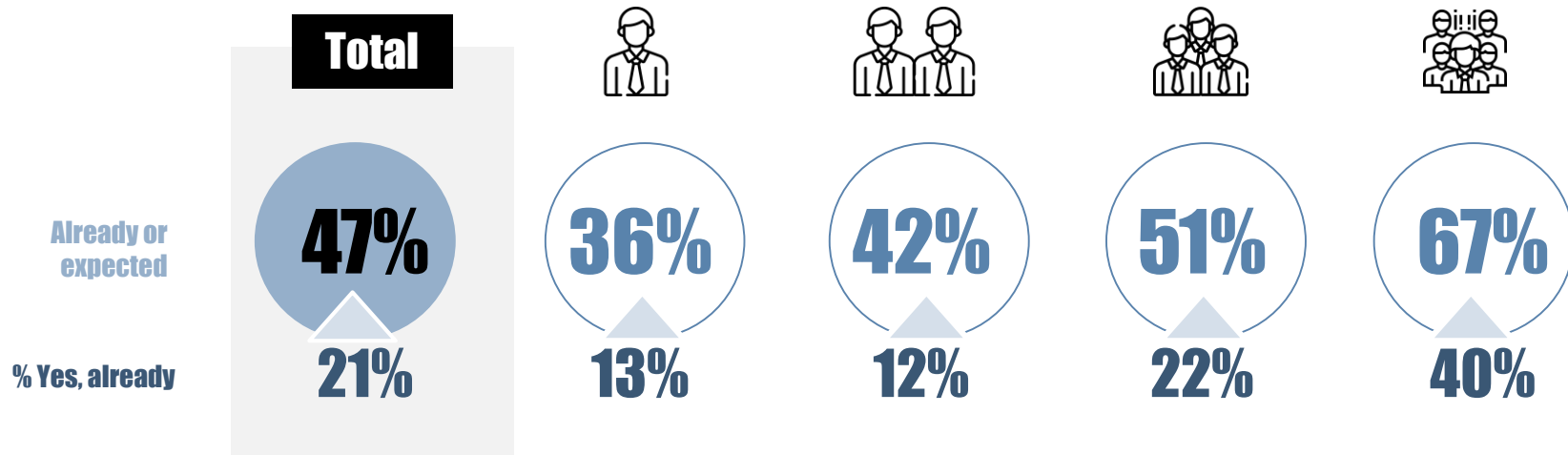
#4		DE	35%
#5		FR	34%
#6		CH	32%
#7		ES	28%
#8		PT	27%
#9		LU	19%
#11		IT	13%
#12		PL	8%
#13		CZ	7%

IMPACT OF THE WLTP TEST INTRODUCTION

NL17. Today, fuel consumption and CO2 emissions are determined with a new, more realistic test cycle: the WLTP-test. Has, or will the new higher and more realistic fuel consumption levels and related CO2 emissions impact on your fleet policy?

Basis: companies with corporate vehicles = 100%

Proportion of companies having already or expecting to be impacted in the next 3 years by the new WLTP test

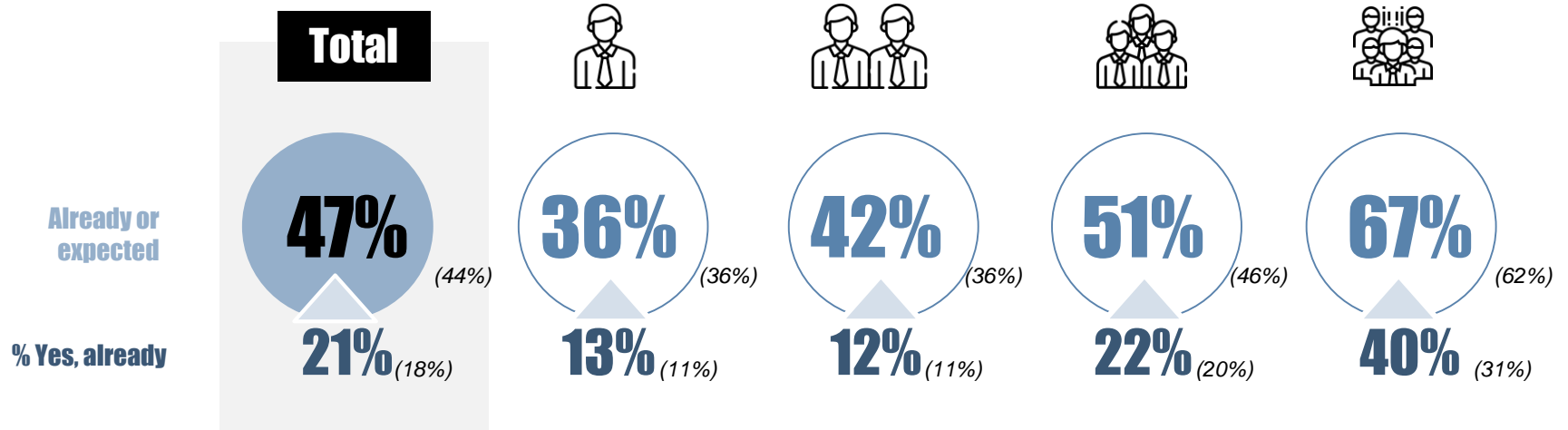


IMPACT OF THE WLTP TEST INTRODUCTION

NL17. Today, fuel consumption and CO2 emissions are determined with a new, more realistic test cycle: the WLTP-test. Has, or will the new higher and more realistic fuel consumption levels and related CO2 emissions impact on your fleet policy?

Basis: companies with corporate vehicles = 100%

Proportion of companies having already or expecting to be impacted in the next 3 years by the new WLTP test



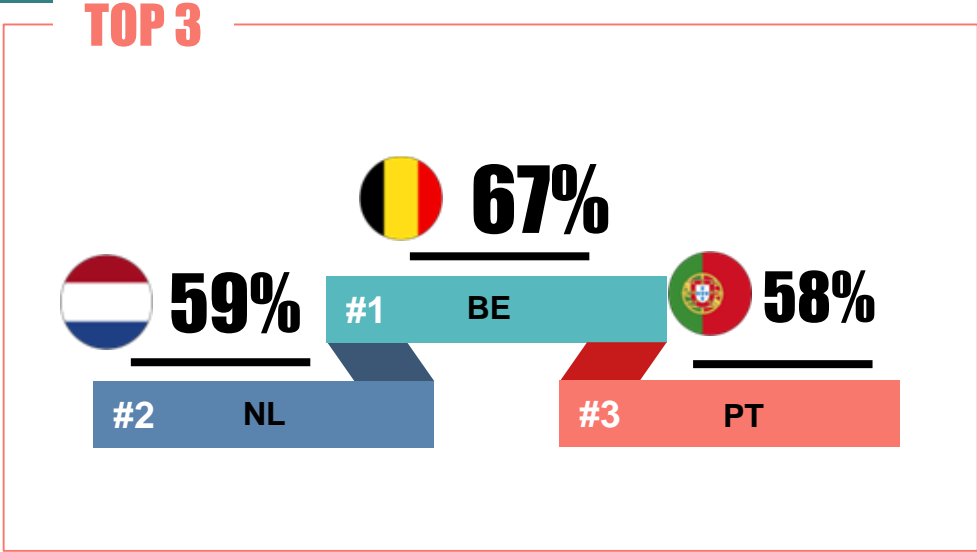
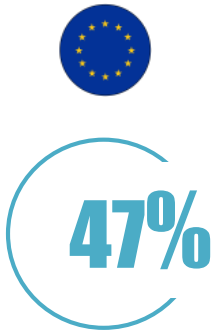
IMPACT OF THE WLTP TEST INTRODUCTION

NL17. Today, fuel consumption and CO2 emissions are determined with a new, more realistic test cycle: the WLTP-test. Has, or will the new higher and more realistic fuel consumption levels and related CO2 emissions impact on your fleet policy?

Basis: companies with corporate vehicles = 100%

Proportion of companies having already or expecting to be impacted in the next 3 years by the new WLTP test

% Already impacted + expected to be impacted in the next 3 years



#4		FR	57%
#5		PL	54%
#6		CH	52%
#7		DE	47%
#8		UK	47%
#9		ES	44%
#10		LU	35%
#11		IT	31%
#12		CZ	23%

IMPACT OF THE WLTP TEST INTRODUCTION

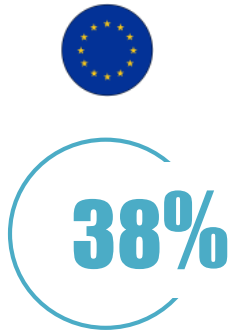


NL17. Today, fuel consumption and CO2 emissions are determined with a new, more realistic test cycle: the WLTP-test. Has, or will the new higher and more realistic fuel consumption levels and related CO2 emissions impact on your fleet policy?

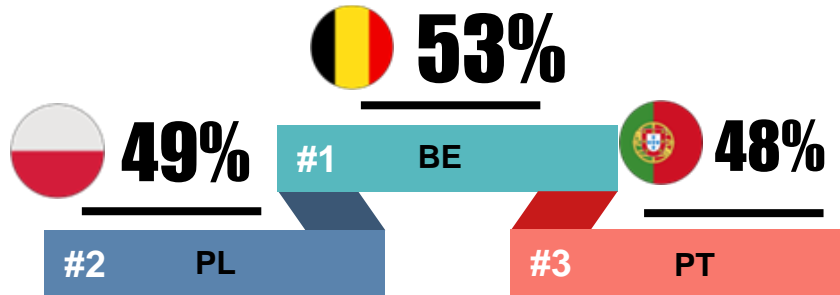
Basis: companies with corporate vehicles = 100%

Proportion of companies having already or expecting to be impacted in the next 3 years by the new WLTP test

% Already impacted
+ expected to be impacted
in the next 3 years



TOP 3



#4		DE	44%
#5		CH	43%
#6		NL	43%
#7		FR	42%
#8		UK	40%
#9		ES	35%
#10		LU	31%
#11		IT	26%
#12		CZ	12%

IMPACT OF THE WLTP TEST INTRODUCTION

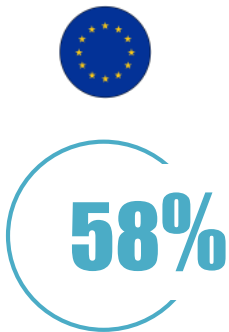


NL17. Today, fuel consumption and CO2 emissions are determined with a new, more realistic test cycle: the WLTP-test. Has, or will the new higher and more realistic fuel consumption levels and related CO2 emissions impact on your fleet policy?

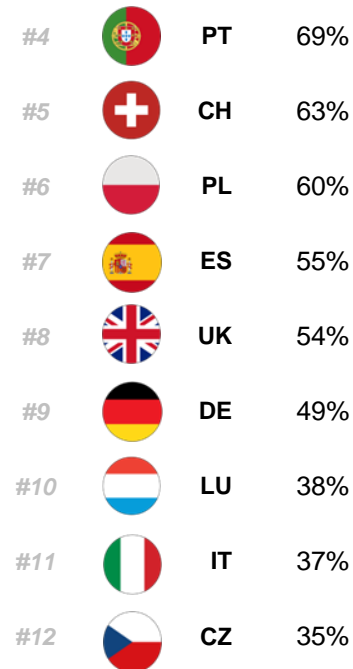
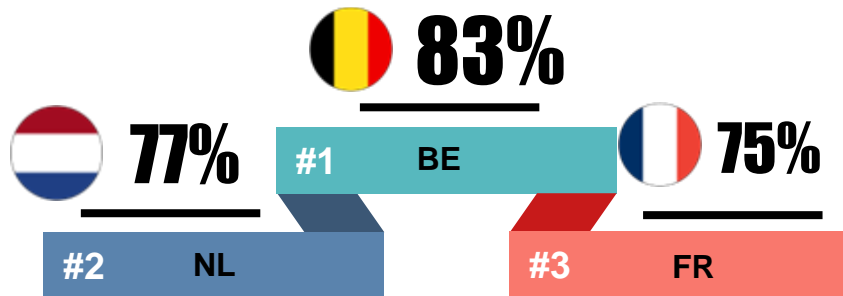
Basis: companies with corporate vehicles = 100%

Proportion of companies having already or expecting to be impacted in the next 3 years by the new WLTP test

% Already impacted
+ expected to be impacted
in the next 3 years



TOP 3

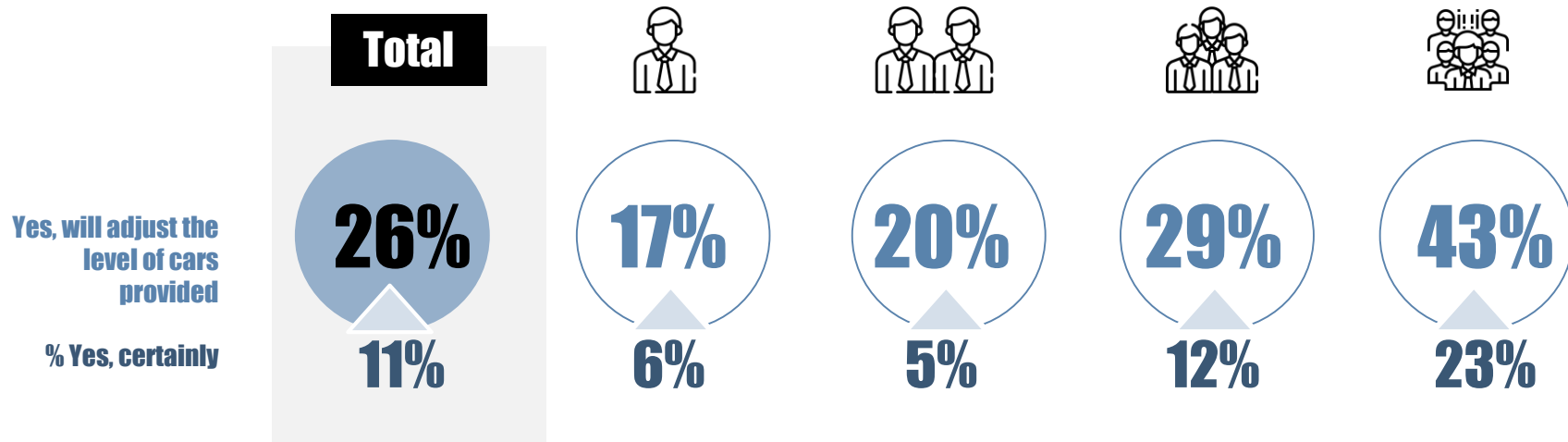


IMPACT OF THE WLTP TEST INTRODUCTION

PROPORTION OF COMPANIES EXPECTING TO ADJUST CARS LEVEL

NL17b. Because of these new constraints resulting from the introducing of the new WLTP test, will you adjust the level of cars provided to your employees to compensate?
Basis: companies with corporate vehicles = 100%

Proportion of companies expecting to adjust the level of cars to compensate the impact of the WLTP test



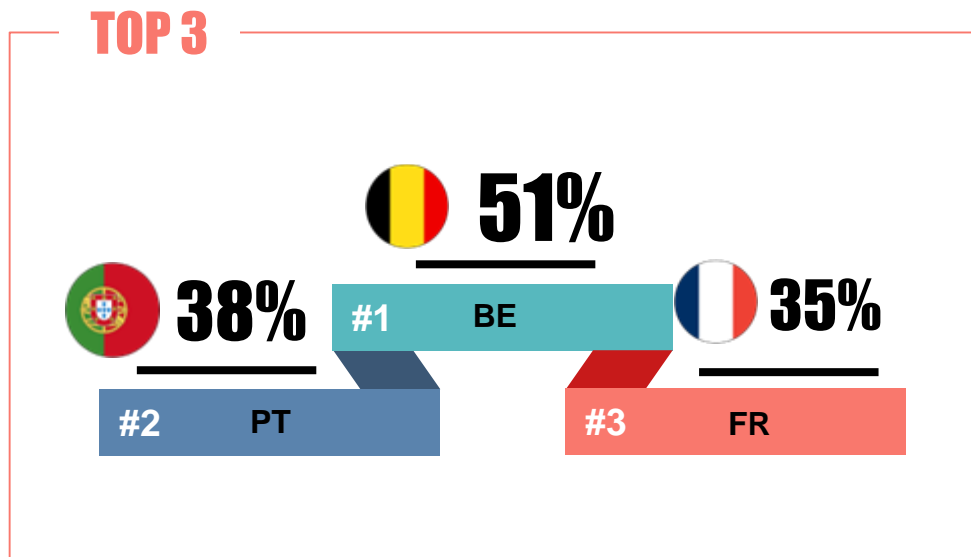
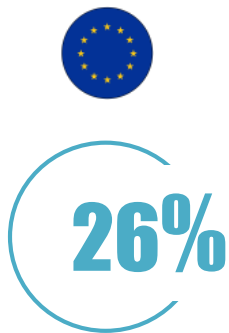
IMPACT OF THE WLTP TEST INTRODUCTION

PROPORTION OF COMPANIES EXPECTING TO ADJUST CARS LEVEL

NL17b. Because of these new constraints resulting from the introducing of the new WLTP test, will you adjust the level of cars provided to your employees to compensate?
 Basis: companies with corporate vehicles = 100%

Proportion of companies expecting to adjust the level of cars to compensate the impact of the WLTP test

%WILL ADJUST THE LEVEL OF CARS PROVIDED



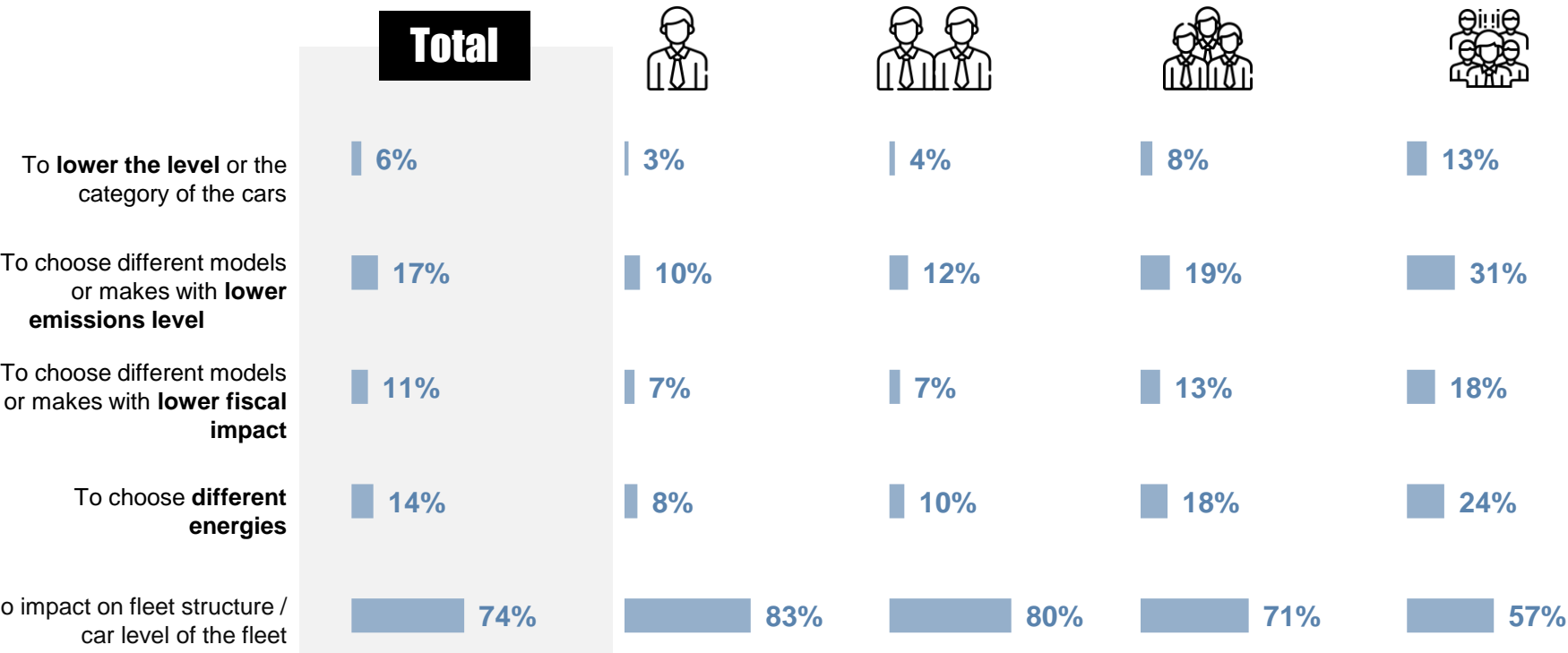
#4		NL	34%
#5		DE	29%
#6		PL	27%
#7		CH	26%
#8		LU	20%
#9		ES	16%
#10		UK	15%
#11		IT	15%
#12		CZ	11%

IMPACT OF THE WLTP TEST INTRODUCTION

COMPENSATIONS EXPECTING BY COMPANIES DUE TO WLTP TEST

NL17c. What kinds of compensations are you likely to implement? / Several answers possible: sum can be higher than 100%

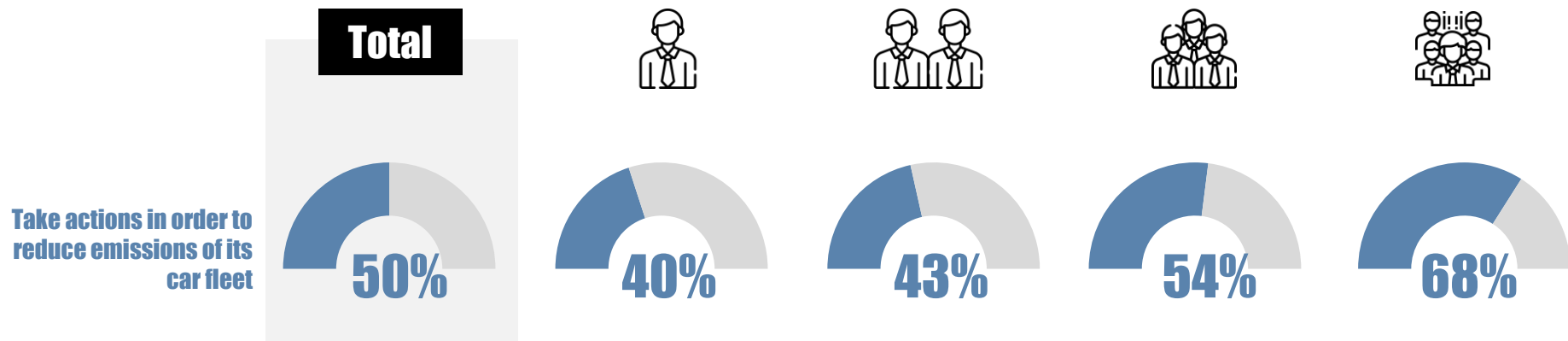
Basis: companies with corporate vehicles = 100%



COMPANIES TAKEN ACTIONS TO REDUCE FLEET EMISSIONS

NL19a. In its fleet vehicle purchasing strategy or Car Policy, does your company take actions in order to reduce emissions of its car fleet?

Basis : Companies with corporate vehicles, without "don't know"

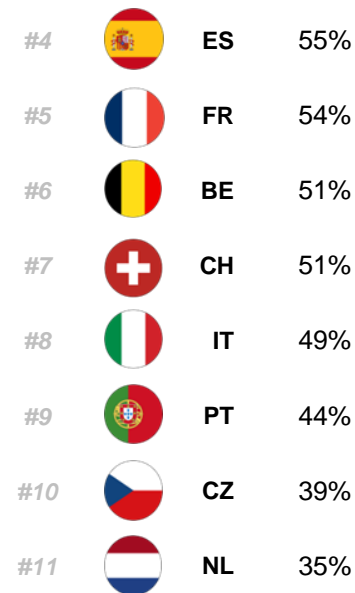
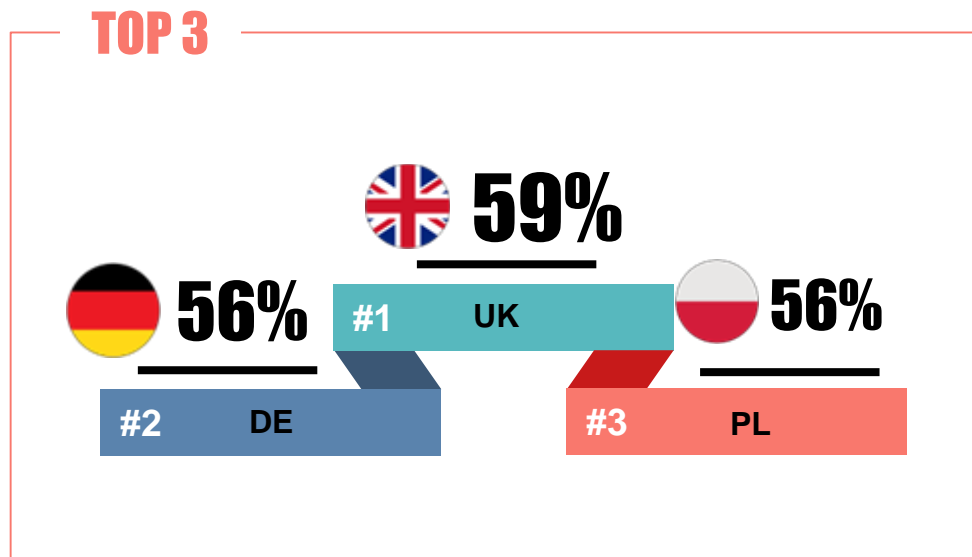


COMPANIES TAKEN ACTIONS TO REDUCE FLEET EMISSIONS

NL19a. In its fleet vehicle purchasing strategy or Car Policy, does your company take actions in order to reduce emissions of its car fleet?

Basis : Companies with corporate vehicles, without "don't know"

%TAKE ACTIONS IN ORDER TO REDUCE EMISSIONS OF ITS CAR FLEET

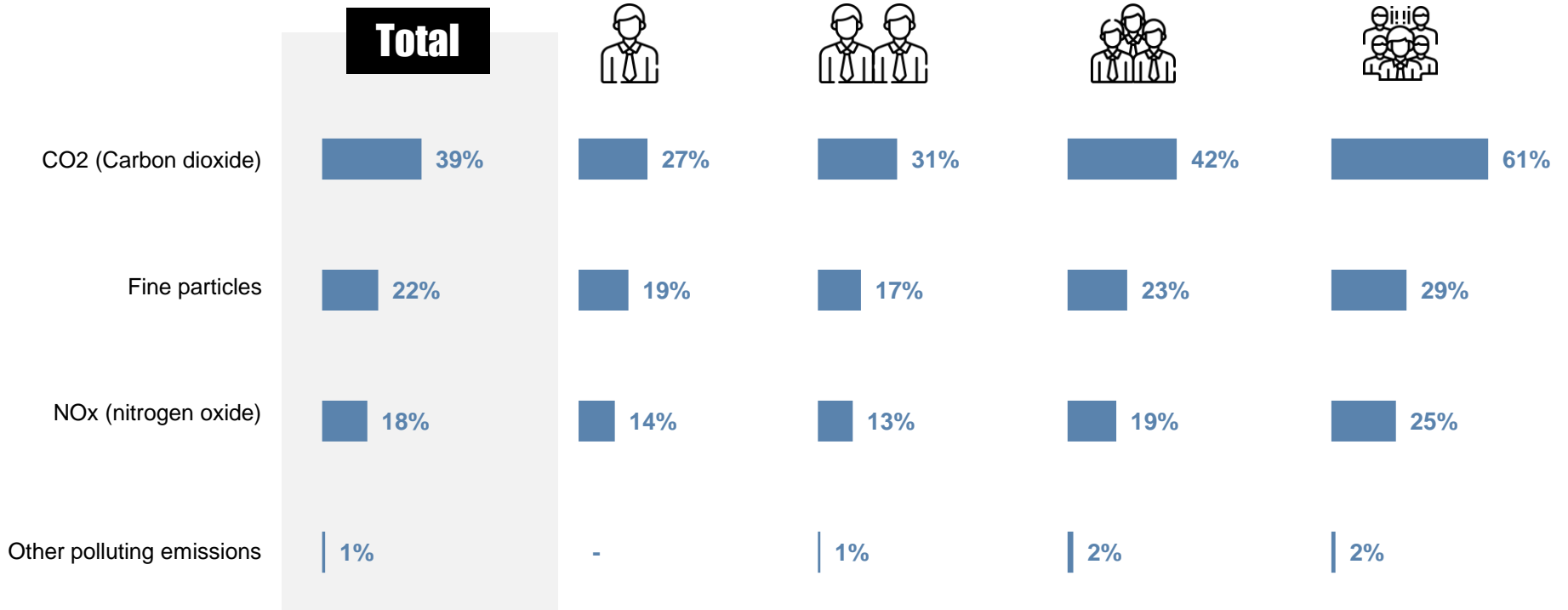


EMISSIONS CONSIDERED IN THE CAR POLICY

NL19b. Which of the following emissions do you take into account in your company car policy?

Basis : Companies with corporate vehicles, without "don't know"

Proportion of companies taking into account the following pollutant emission in their fleet policy

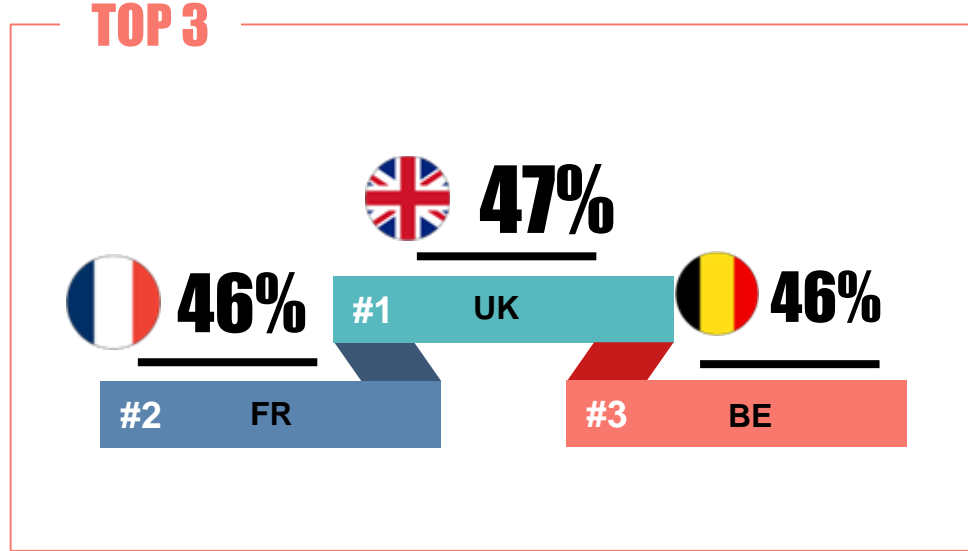
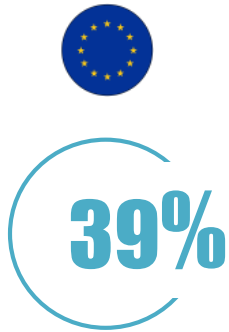









PROPORTION OF COMPANIES TAKING CO2 EMISSIONS INTO ACCOUNT IN THEIR CAR POLICY

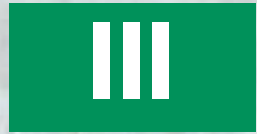
NL19b. Which of the following emissions do you take into account in your company car policy?
 Basis : Companies with corporate vehicles, without "don't know"

Proportion of companies taking into account CO2 emissions in their car policy

%TAKE ACTIONS IN ORDER TO REDUCE EMISSIONS OF ITS CAR FLEET



#4		DE	43%
#5		ES	42%
#6		PL	41%
#7		PT	37%
#8		CH	37%
#9		IT	29%
#10		NL	28%
#11		CZ	28%



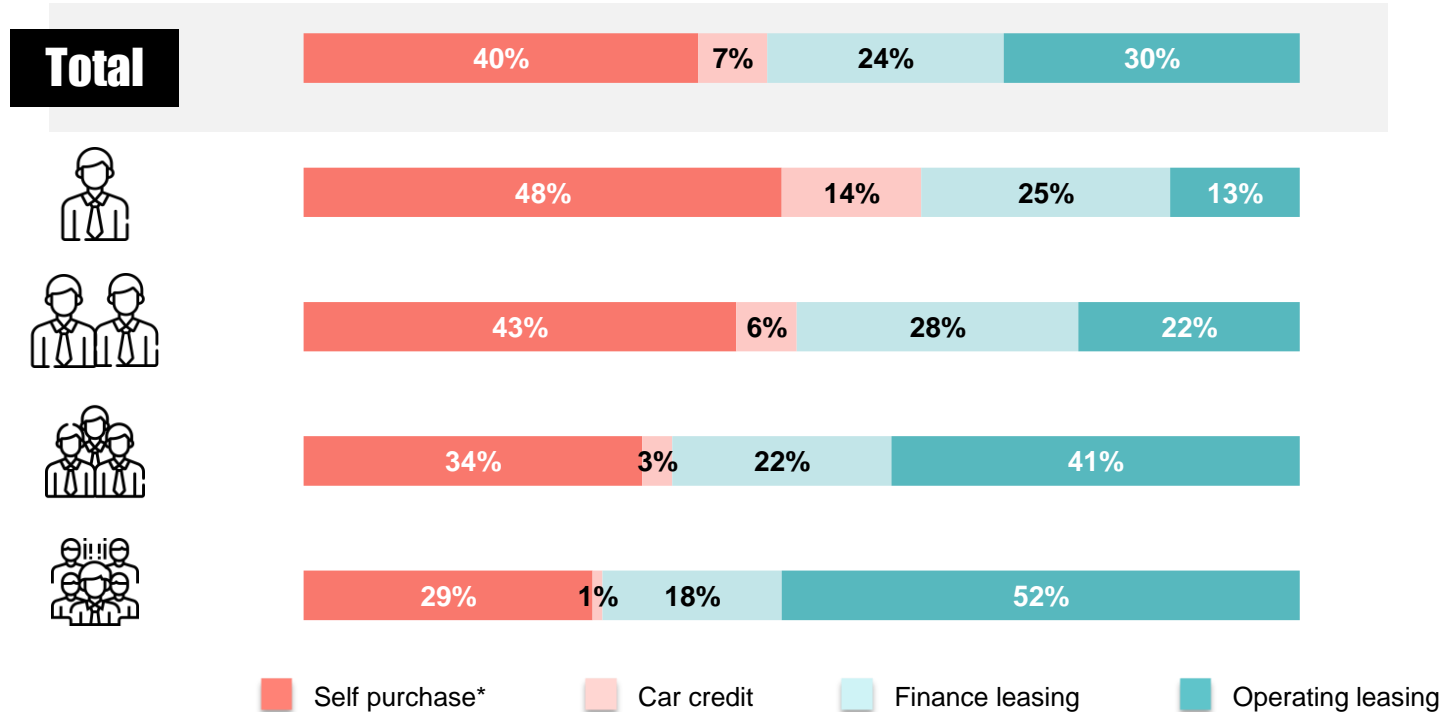
FINANCING

MAIN FINANCING METHOD

B2. What is the main financing method used to finance your company vehicles today?

Basis: companies with corporate vehicles = 100%

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



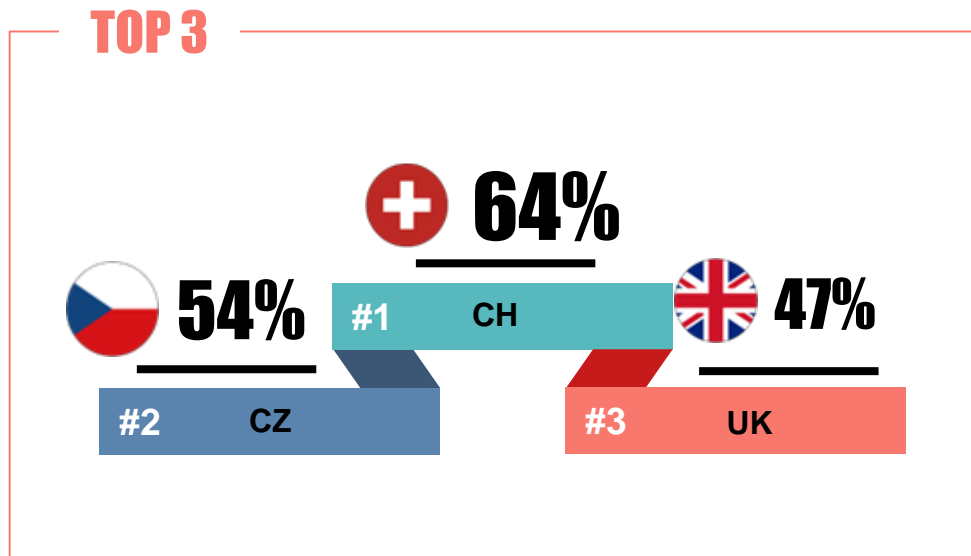
MAIN FINANCING METHOD

Self purchase

B2. What is the main financing method used to finance your company vehicles today?

Basis: companies with corporate vehicles = 100%

Proportion of companies using self purchase as their main financing method for their fleet vehicles



#4		NL	46%
#5		PL	46%
#6		PT	37%
#7		DE	34%
#8		ES	31%
#9		BE	31%
#10		LU	27%
#11		IT	28%
#12		FR	25%

EVOLUTION OF THE MAIN FINANCING METHOD

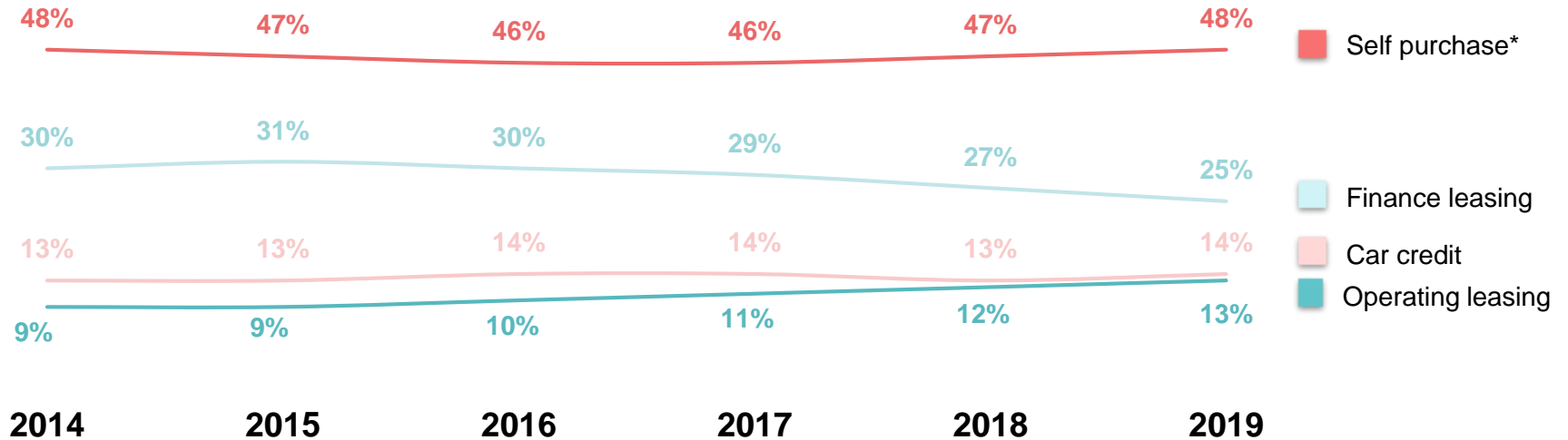
FOCUS ON 1 TO 9

B2. What is the main financing method used to finance your company vehicles today?

Basis: companies with corporate vehicles = 100%



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



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

Data have been consolidated: 3 years average

Results provided for 2016 are calculated by the mean of an extrapolation between the results of the years 2015 and 2017.

EVOLUTION OF THE MAIN FINANCING METHOD

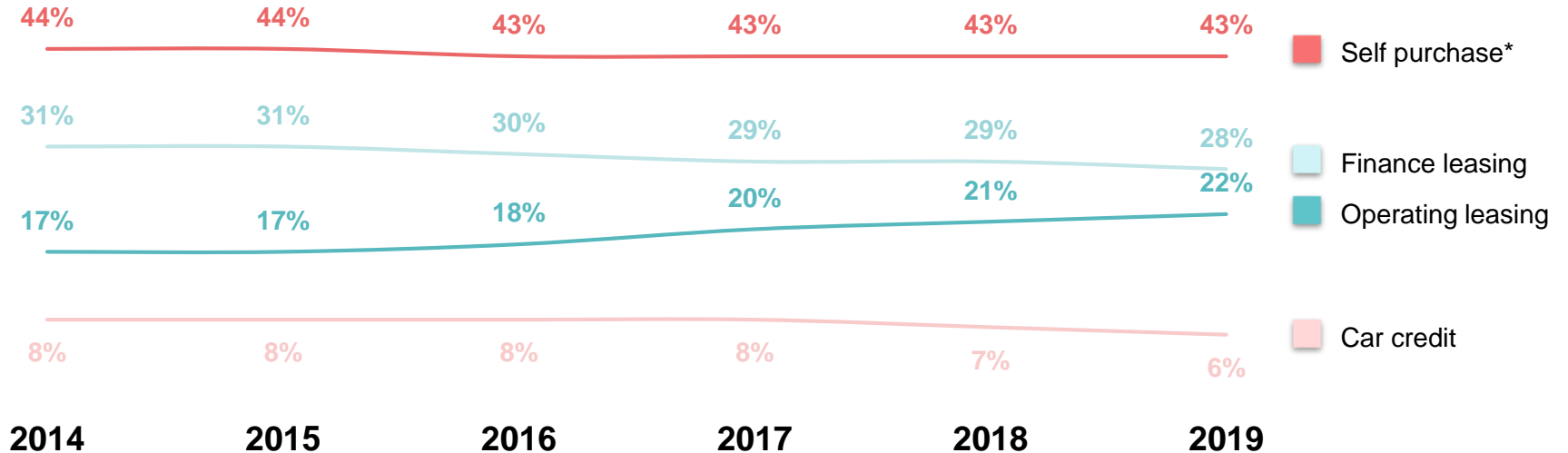
FOCUS ON 10 TO 99

B2. What is the main financing method used to finance your company vehicles today?

Basis: companies with corporate vehicles = 100%



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



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

Data have been consolidated: 3 years average

Results provided for 2016 are calculated by the mean of an extrapolation between the results of the years 2015 and 2017.

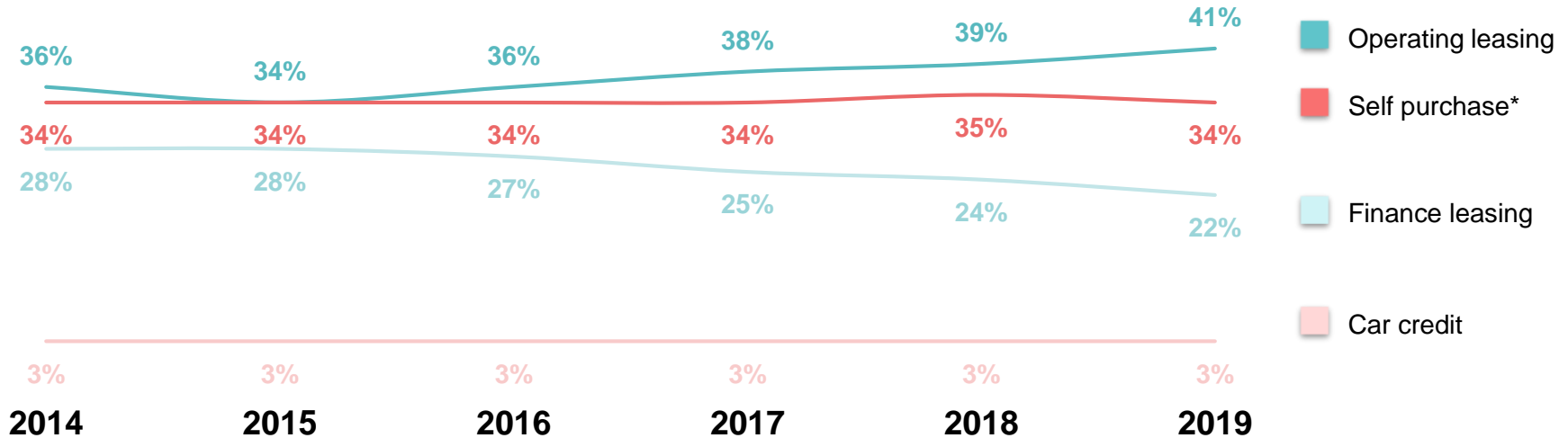
EVOLUTION OF THE MAIN FINANCING METHOD

FOCUS ON 100 TO 249/499/999

B2. What is the main financing method used to finance your company vehicles today?
 Basis: companies with corporate vehicles = 100%



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



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

Data have been consolidated: 3 years average

Results provided for 2016 are calculated by the mean of an extrapolation between the results of the years 2015 and 2017.

EVOLUTION OF THE MAIN FINANCING METHOD

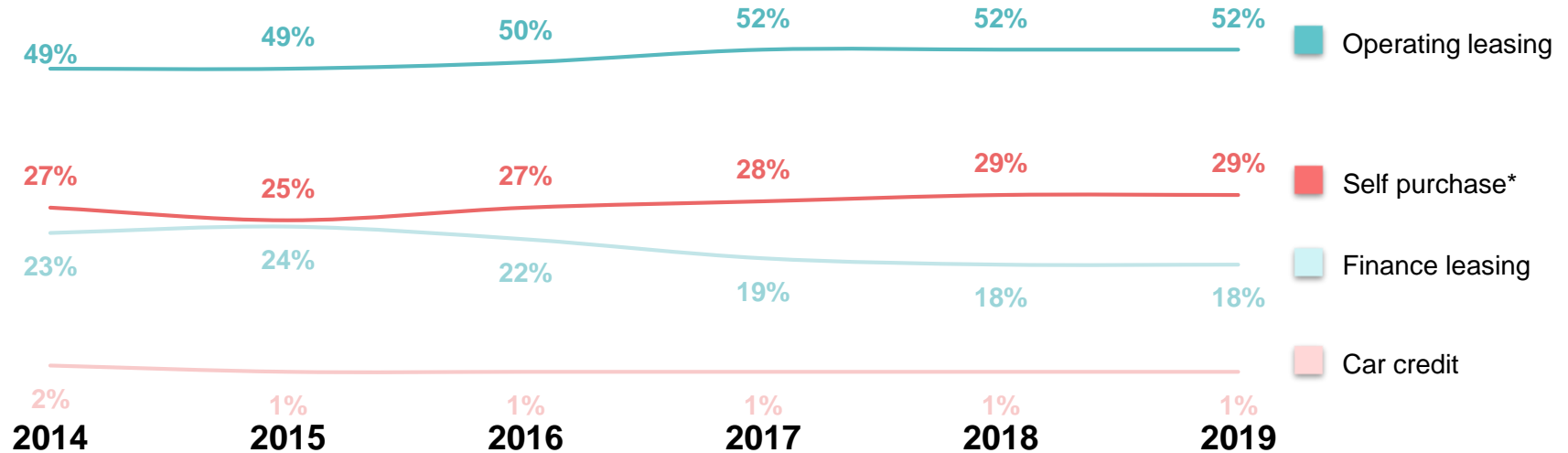
FOCUS ON 250/500/1000 AND MORE

B2. What is the main financing method used to finance your company vehicles today?

Basis: companies with corporate vehicles = 100%



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



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

Data have been consolidated: 3 years average

Results provided for 2016 are calculated by the mean of an extrapolation between the results of the years 2015 and 2017.

EVOLUTION OF THE MAIN FINANCING METHOD

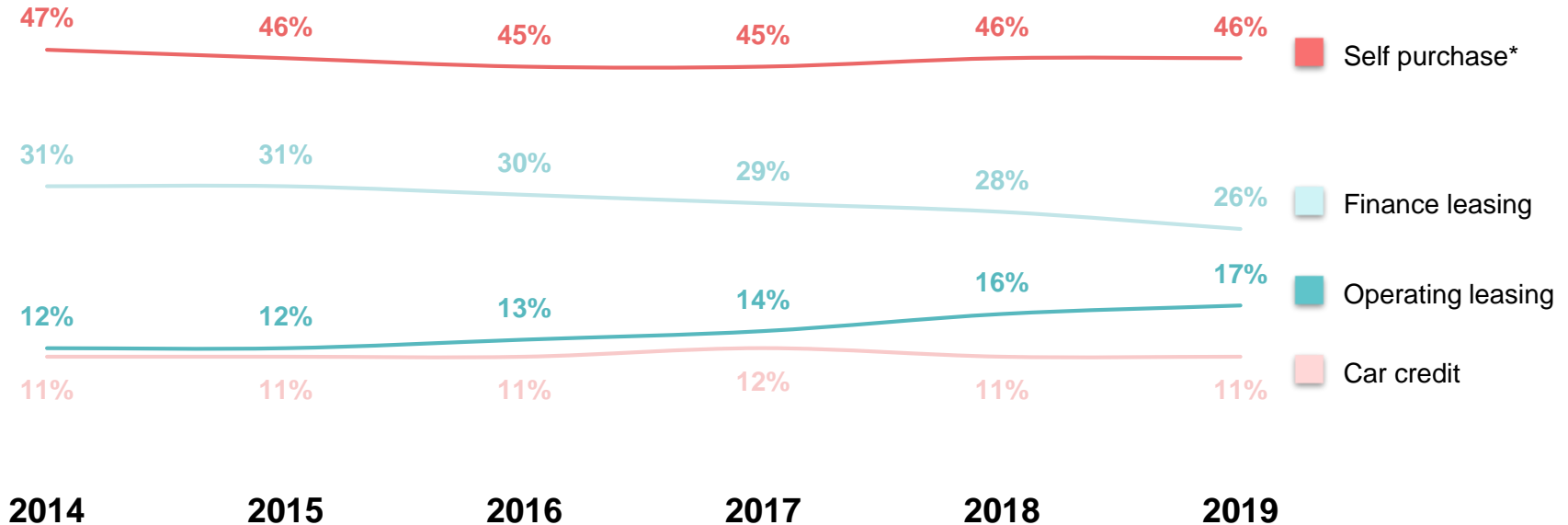
FOCUS ON 1 TO 99

B2. What is the main financing method used to finance your company vehicles today?

Basis: companies with corporate vehicles = 100%



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



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

Data have been consolidated: 3 years average

Results provided for 2016 are calculated by the mean of an extrapolation between the results of the years 2015 and 2017.

EVOLUTION OF THE MAIN FINANCING METHOD

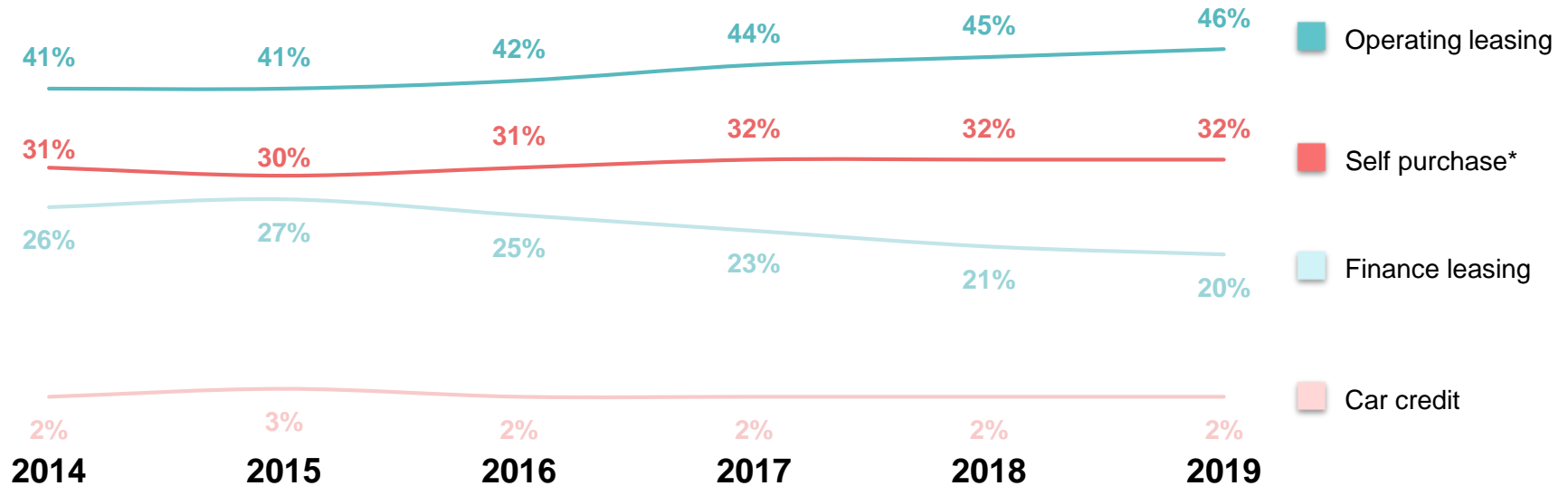
FOCUS ON 100 AND MORE

B2. What is the main financing method used to finance your company vehicles today?

Basis: companies with corporate vehicles = 100%



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



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

Data have been consolidated: 3 years average

Results provided for 2016 are calculated by the mean of an extrapolation between the results of the years 2015 and 2017.

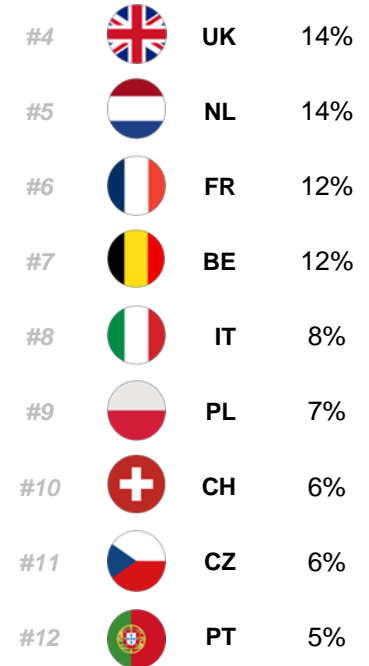
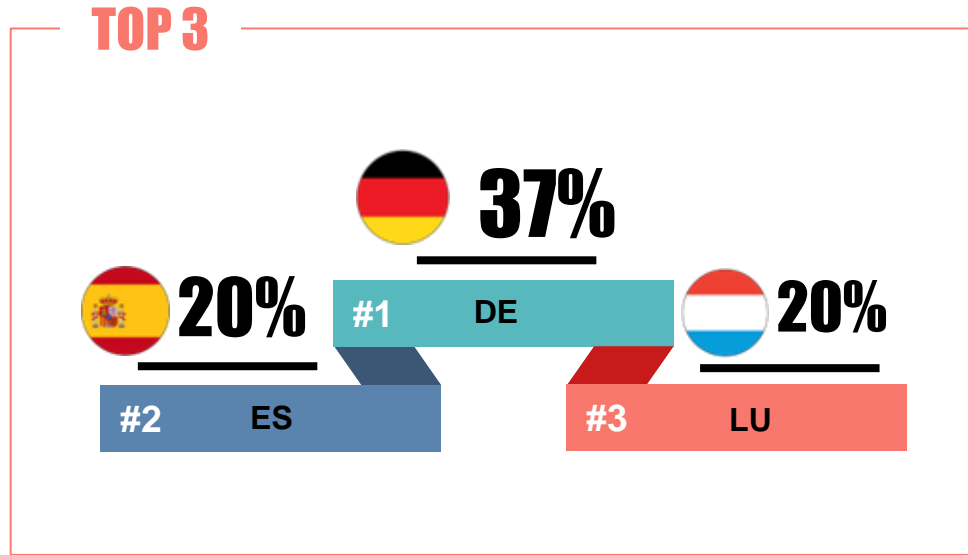
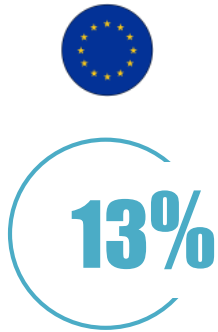
MAIN FINANCING METHOD – Focus Operating leasing

focus on 1 to 9

B2. What is the main financing method used to finance your company vehicles today?
Basis: companies with corporate vehicles = 100%



Proportion of companies using operating leasing as their main financing method for their fleet vehicles



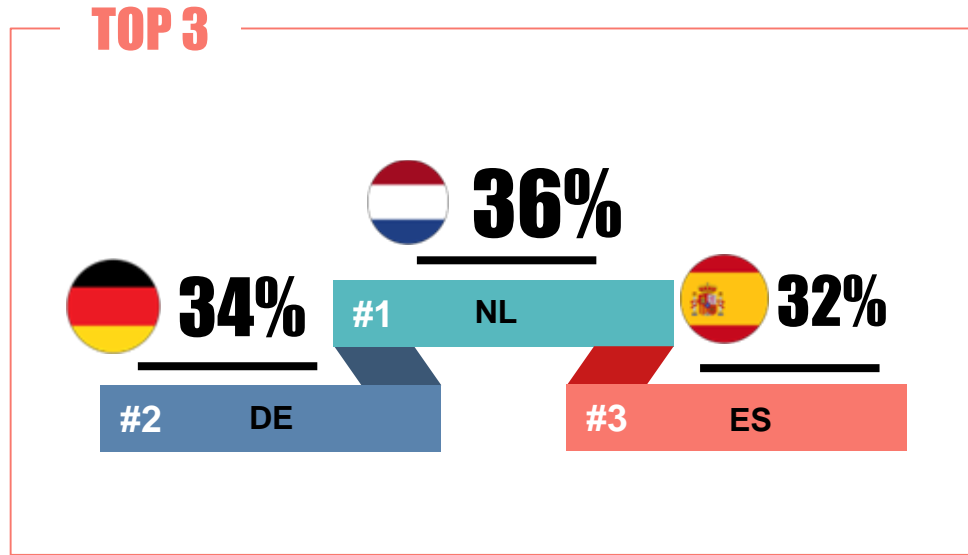
MAIN FINANCING METHOD – Focus Operating leasing

focus on 10 to 99

B2. What is the main financing method used to finance your company vehicles today?
 Basis: companies with corporate vehicles = 100%



Proportion of companies using operating leasing as their main financing method for their fleet vehicles



#4		LU	30%
#5		UK	26%
#6		FR	25%
#7		BE	25%
#8		CZ	20%
#9		IT	15%
#10		PL	11%
#11		PT	11%
#12		CH	4%

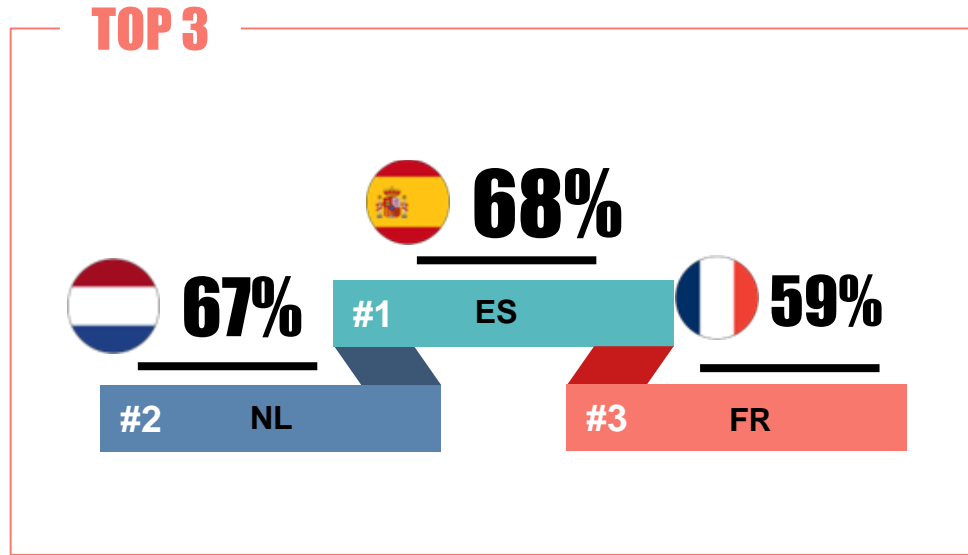
MAIN FINANCING METHOD – Focus Operating leasing

focus on 100 to 249/499/999

B2. What is the main financing method used to finance your company vehicles today?
Basis: companies with corporate vehicles = 100%



Proportion of companies using operating leasing as their main financing method for their fleet vehicles



#4		DE	59%
#5		BE	50%
#6		LU	39%
#7		IT	40%
#8		UK	40%
#9		PT	22%
#10		CZ	22%
#11		PL	11%
#12		CH	10%

MAIN FINANCING METHOD – Focus Operating leasing

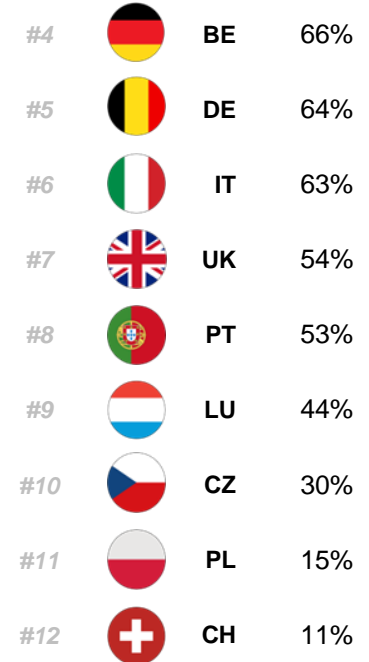
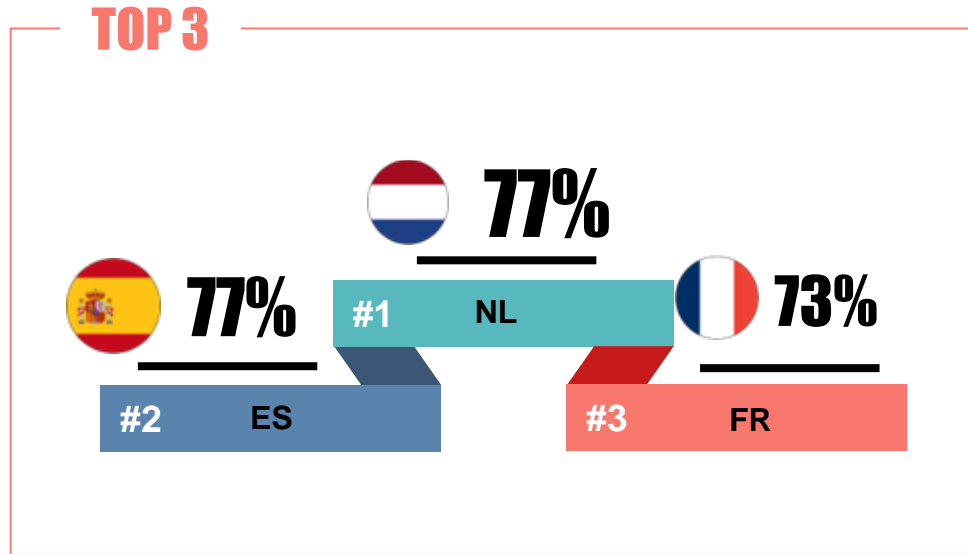
focus on 250/500/1000 and more

B2. What is the main financing method used to finance your company vehicles today?

Basis: companies with corporate vehicles = 100%



Proportion of companies using operating leasing as their main financing method for their fleet vehicles



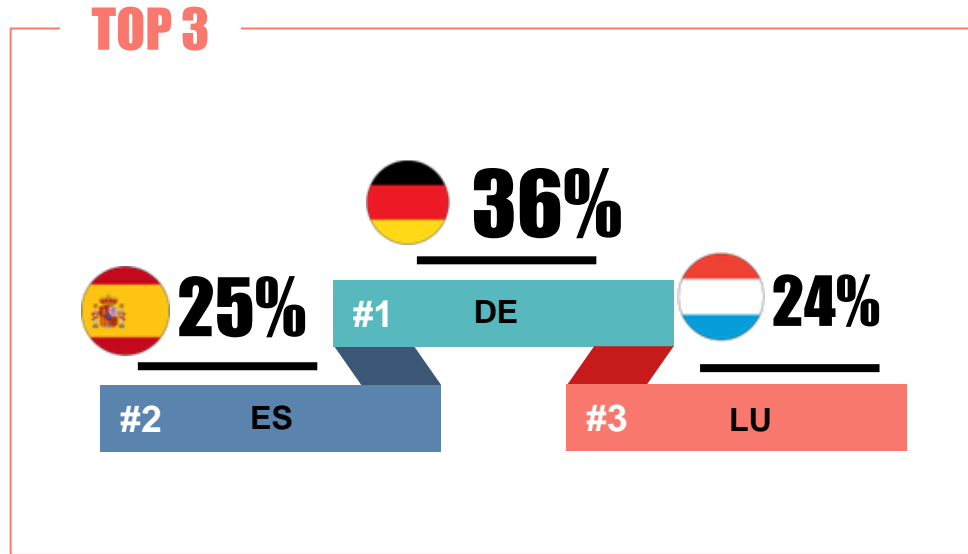
MAIN FINANCING METHOD – Focus Operating leasing

focus on 1 to 99

B2. What is the main financing method used to finance your company vehicles today?
 Basis: companies with corporate vehicles = 100%



Proportion of companies using operating leasing as their main financing method for their fleet vehicles



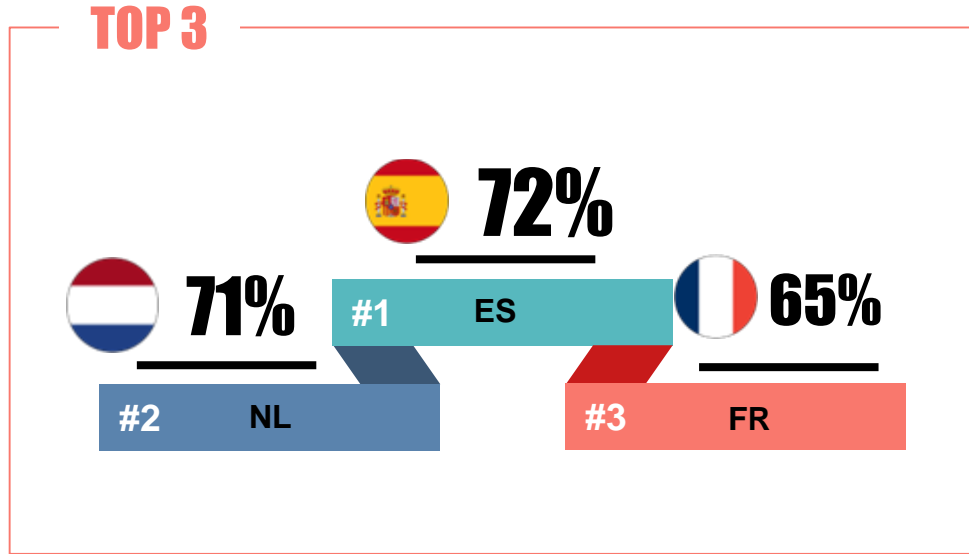
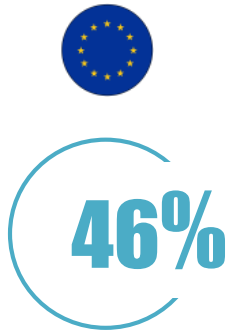
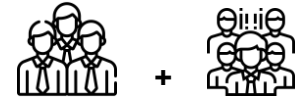
#4		NL	23%
#5		UK	18%
#6		FR	17%
#7		BE	17%
#8		CZ	11%
#9		IT	11%
#10		PL	8%
#11		PT	7%
#12		CH	5%

MAIN FINANCING METHOD – Focus Operating leasing

focus on 100 and more

B2. What is the main financing method used to finance your company vehicles today?
 Basis: companies with corporate vehicles = 100%

Proportion of companies using operating leasing as their main financing method for their fleet vehicles



#4		DE	61%
#5		BE	57%
#6		IT	50%
#7		UK	46%
#8		LU	41%
#9		PT	35%
#10		CZ	25%
#11		PL	12%
#12		CH	10%

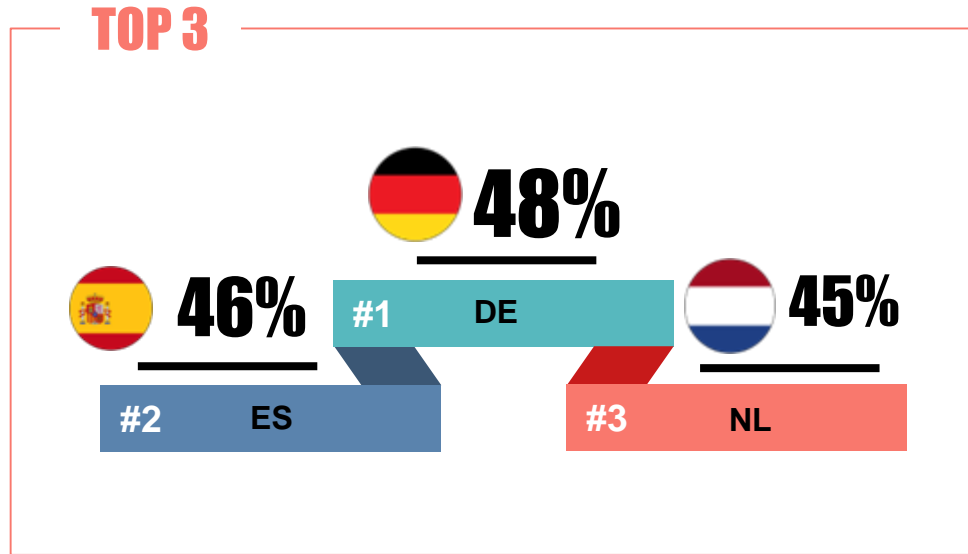
MAIN FINANCING METHOD – Focus Operating leasing

B2. What is the main financing method used to finance your company vehicles today?

Basis: companies with corporate vehicles = 100%

Proportion of companies using operating leasing as their main financing method for their fleet vehicles

Total



#4		FR	39%
#5		BE	36%
#6		LU	32%
#7		UK	31%
#8		IT	29%
#9		PT	20%
#10		CZ	18%
#11		PL	10%
#12		CH	7%

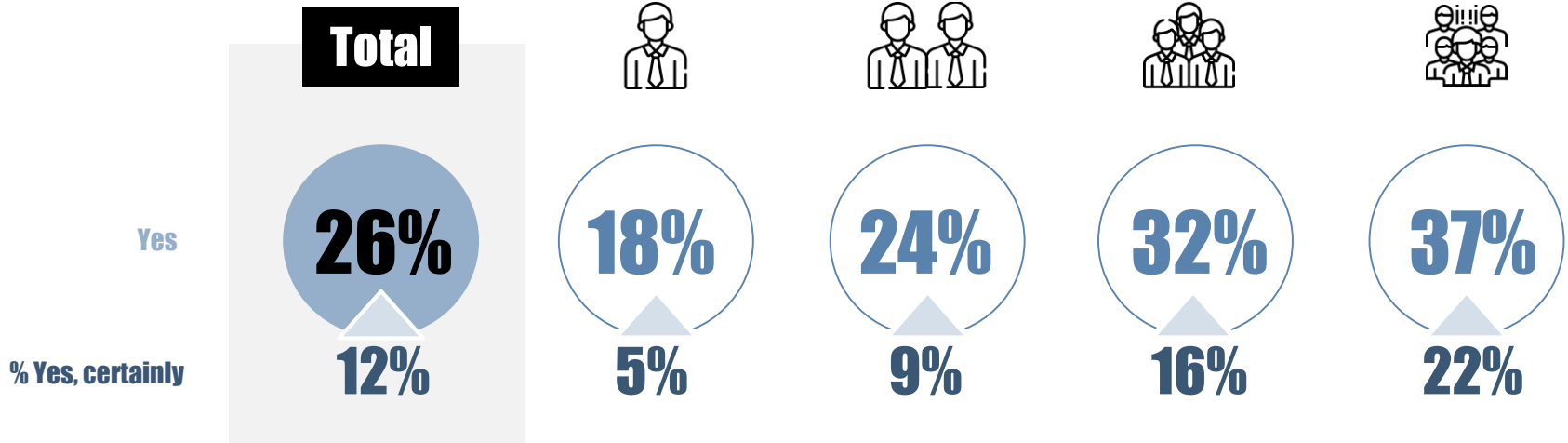
INTENTION TO DEVELOP OPERATING LEASING

B8bis. In the next three years, do you intend to develop Operating Leasing in order to finance your corporate fleet?

B8bisPT. (PT and DE) In the next three years do you intend to introduce or increase Renting in your corporate fleet to benefit from the use of the vehicles, rather than to finance or buy vehicles for your company?

Basis: companies with corporate vehicles = 100%

Proportion of companies having the intention to develop operational leasing



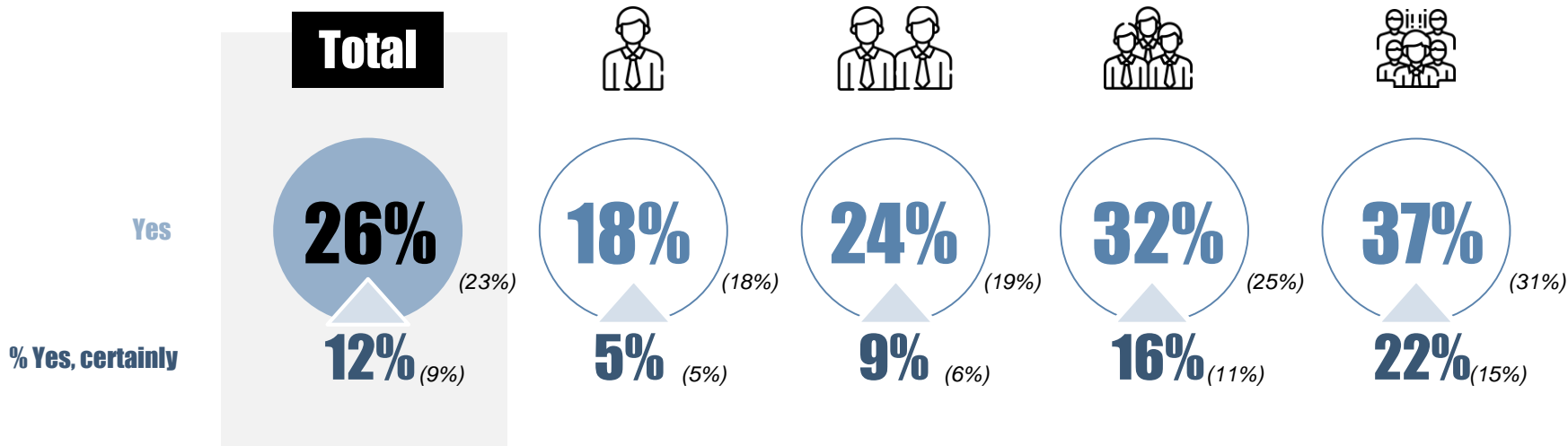
INTENTION TO DEVELOP OPERATING LEASING

B8bis. In the next three years, do you intend to develop Operating Leasing in order to finance your corporate fleet?

B8bisPT. (PT and DE) In the next three years do you intend to introduce or increase Renting in your corporate fleet to benefit from the use of the vehicles, rather than to finance or buy vehicles for your company?

Basis: companies with corporate vehicles = 100%

Proportion of companies having the intention to develop operational leasing



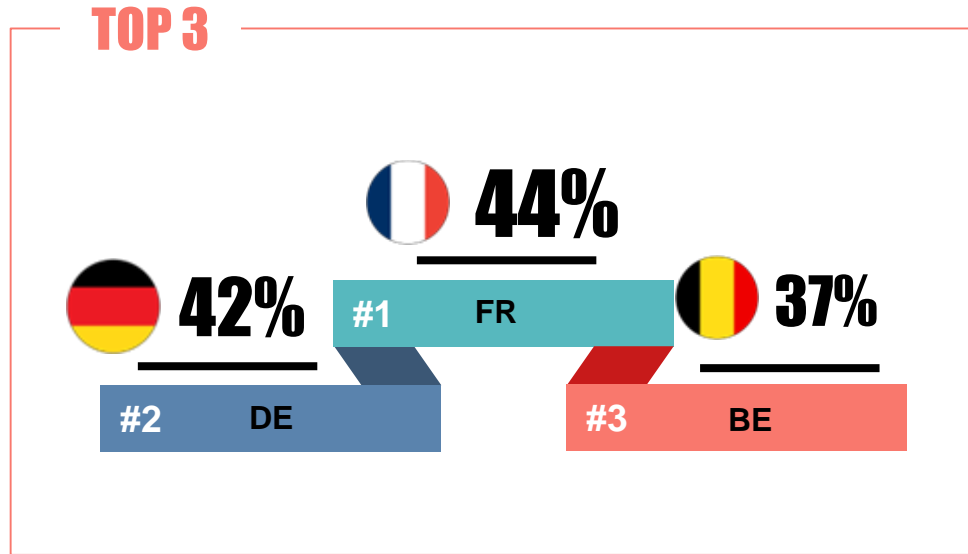
INTENTION TO DEVELOP OPERATING LEASING

B8bis. In the next three years, do you intend to develop Operating Leasing in order to finance your corporate fleet?

B8bisPT. (PT and DE) In the next three years do you intend to introduce or increase Renting in your corporate fleet to benefit from the use of the vehicles, rather than to finance or buy vehicles for your company?

Basis: companies with corporate vehicles = 100%

Proportion of companies having the intention to develop operational leasing



INTENTION TO DEVELOP OPERATING LEASING

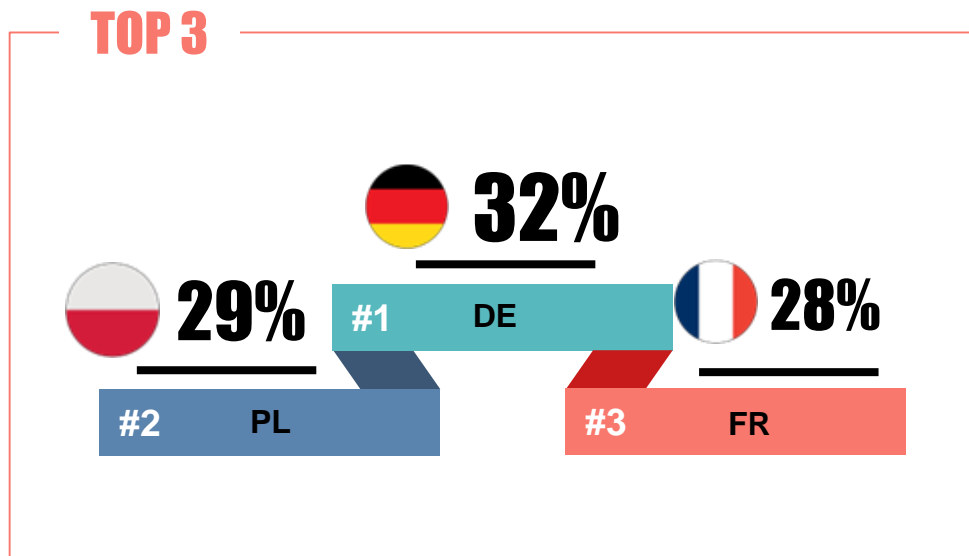


B8bis. In the next three years, do you intend to develop Operating Leasing in order to finance your corporate fleet?

B8bisPT. (PT and DE) In the next three years do you intend to introduce or increase Renting in your corporate fleet to benefit from the use of the vehicles, rather than to finance or buy vehicles for your company?

Basis: companies with corporate vehicles = 100%

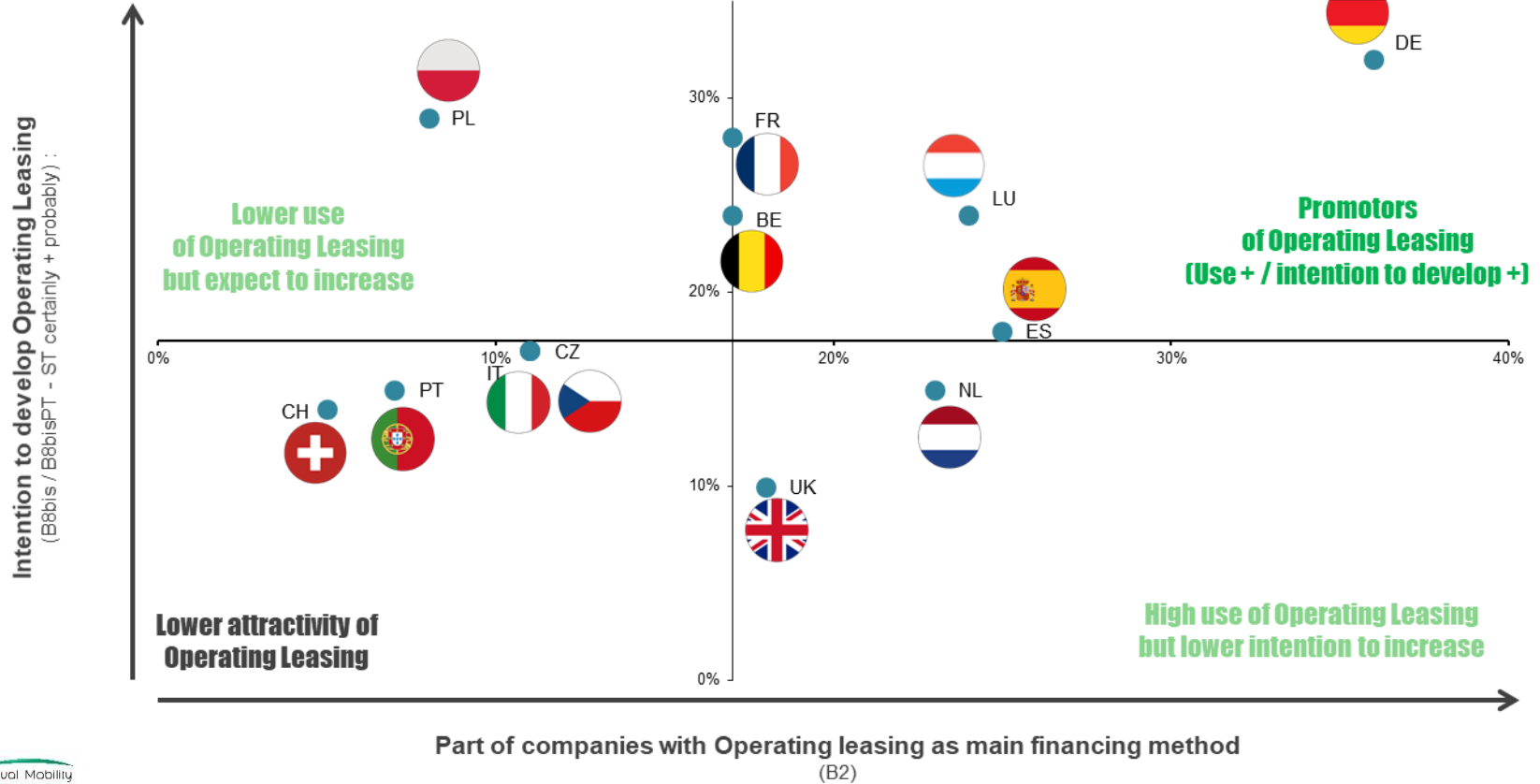
Proportion of companies having the intention to develop operational leasing



#4		BE	24%
#5		LU	24%
#6		ES	18%
#7		IT	17%
#8		CZ	17%
#9		PT	15%
#10		NL	15%
#11		CH	14%
#12		UK	10%



INTENTION TO DEVELOP OPERATING LEASING FOR SME



INTENTION TO DEVELOP OPERATING LEASING

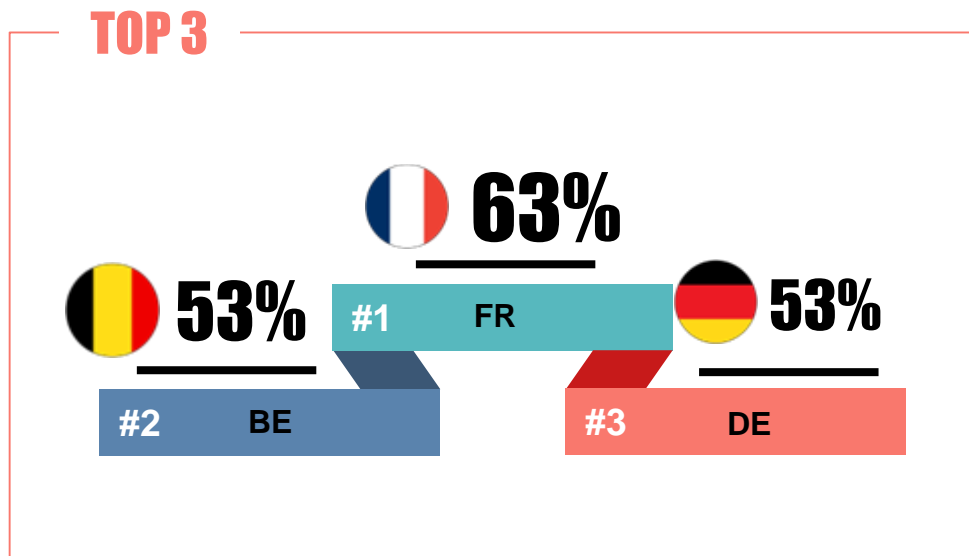
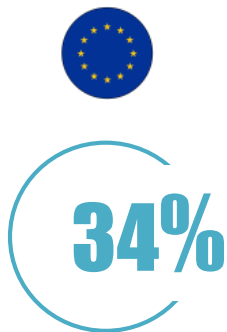


B8bis. In the next three years, do you intend to develop Operating Leasing in order to finance your corporate fleet?

B8bisPT. (PT and DE) In the next three years do you intend to introduce or increase Renting in your corporate fleet to benefit from the use of the vehicles, rather than to finance or buy vehicles for your company?

Basis: companies with corporate vehicles = 100%

Proportion of companies having the intention to develop operational leasing



#4		LU	46%
#5		NL	35%
#6		ES	31%
#7		CZ	29%
#8		PL	29%
#9		IT	22%
#10		PT	21%
#11		UK	15%
#12		CH	15%

IV

TELEMATICS AND DIGITAL TOOLS

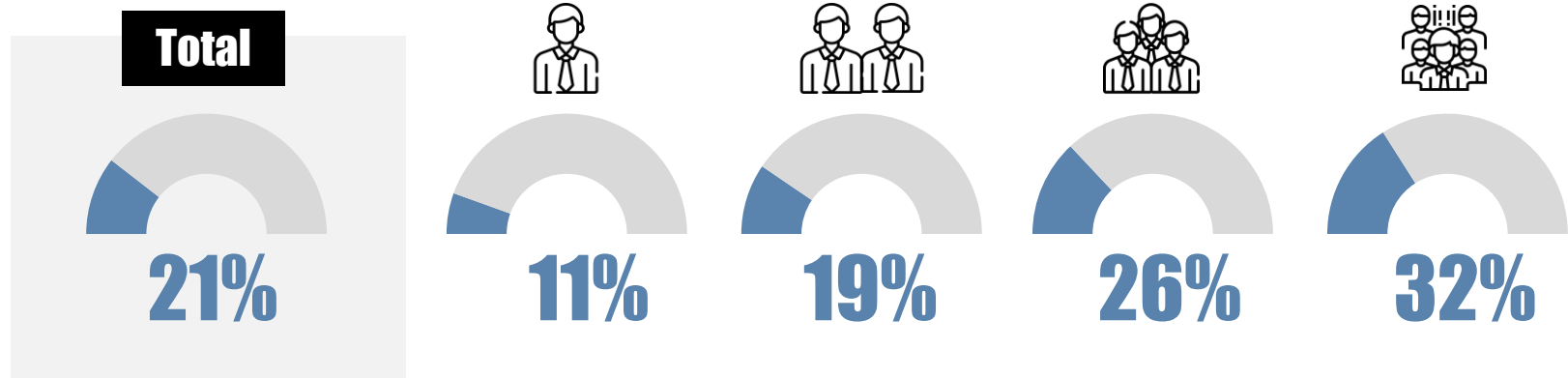
PROPORTION OF COMPANIES USING TELEMATICS

E23a and E23c. Have you implemented Telematics within your fleet...
Basis: companies with corporate vehicles = 100%

Proportion of companies having implemented telematics in their fleet

YES, FOR ALL OR PART
OF THE FLEET

All vehicles (cars + LCVs)



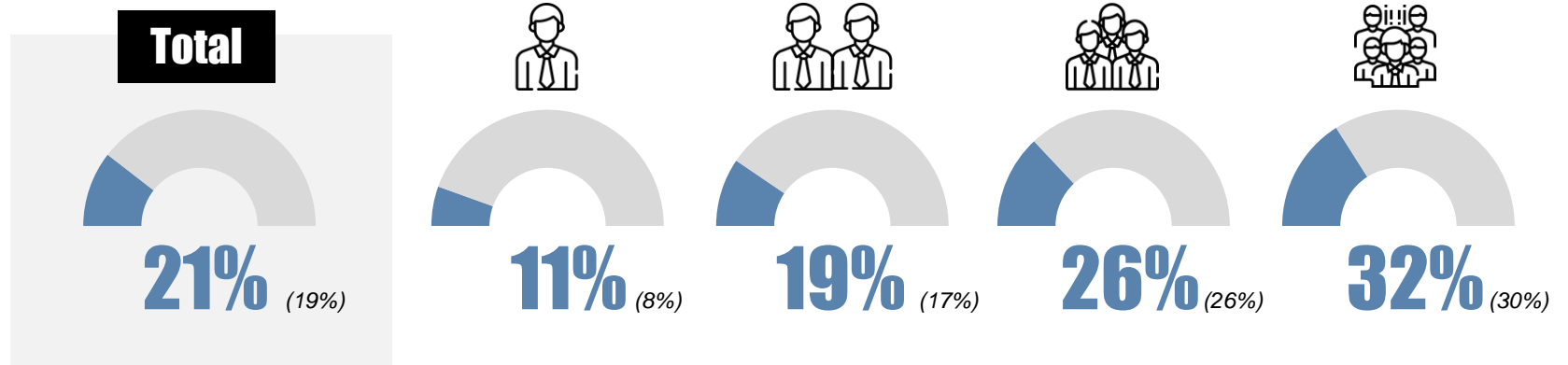
PROPORTION OF COMPANIES USING TELEMATICS

E23a and E23c. Have you implemented Telematics within your fleet...
Basis: companies with corporate vehicles = 100%

Proportion of companies having implemented telematics in their fleet

YES, FOR ALL OR PART
OF THE FLEET

All vehicles (cars + LCVs)



(Reminder of 2018 results)

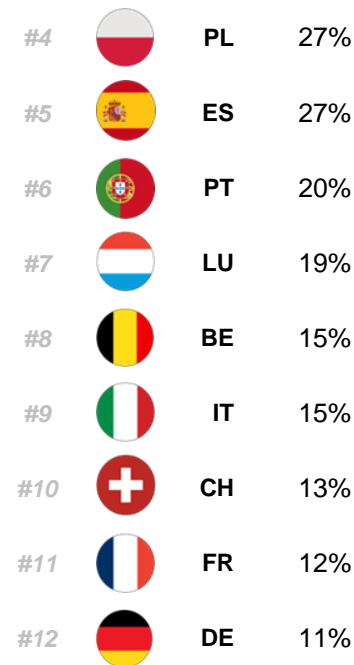
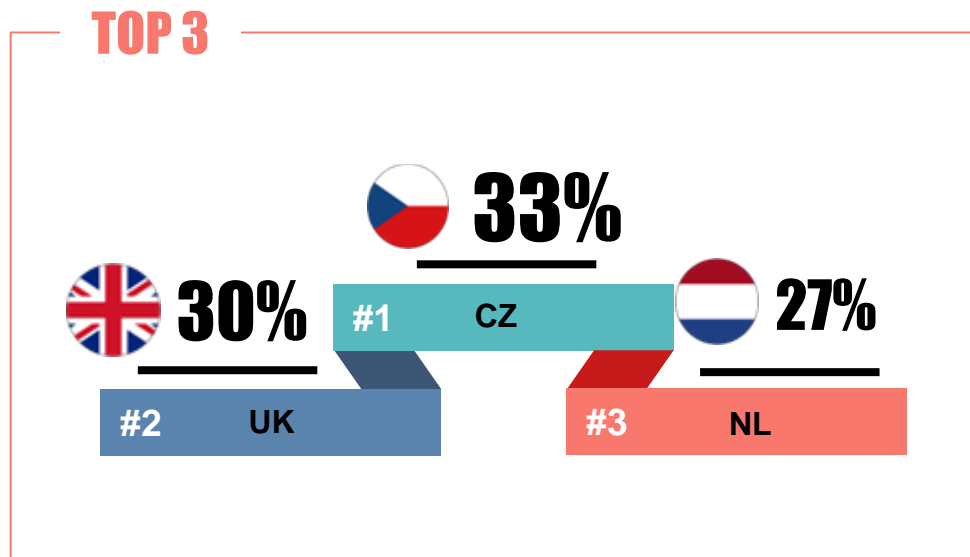
PROPORTION OF COMPANIES USING TELEMATICS

E23a and E23c. Have you implemented Telematics within your fleet...
Basis: companies with corporate vehicles = 100%

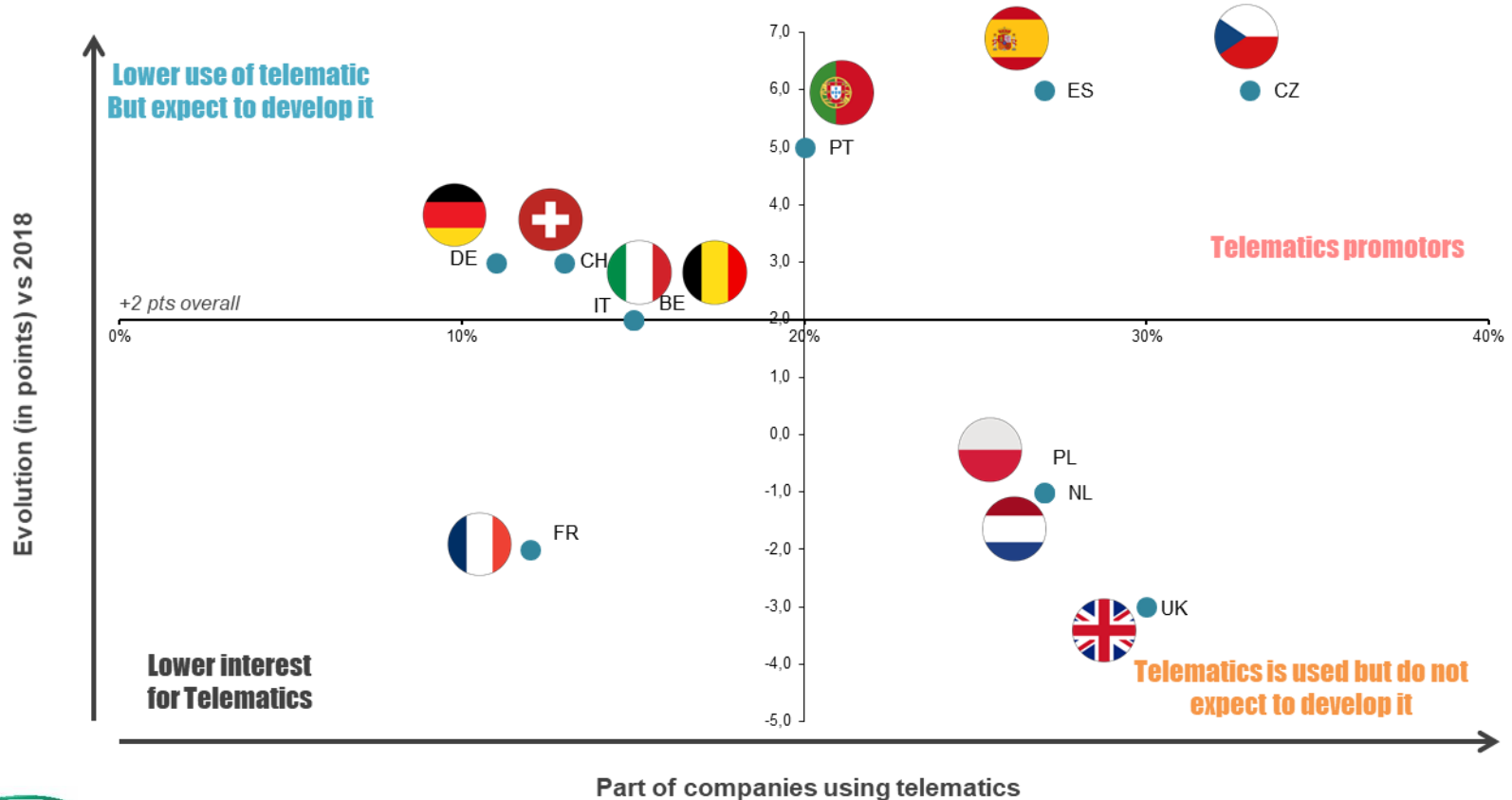
Proportion of companies having implemented telematics in their fleet

YES, FOR ALL OR PART
OF THE FLEET

All vehicles (cars + LCVs)



PROPORTION OF COMPANIES USING TELEMATICS



PROPORTION OF COMPANIES USING TELEMATICS

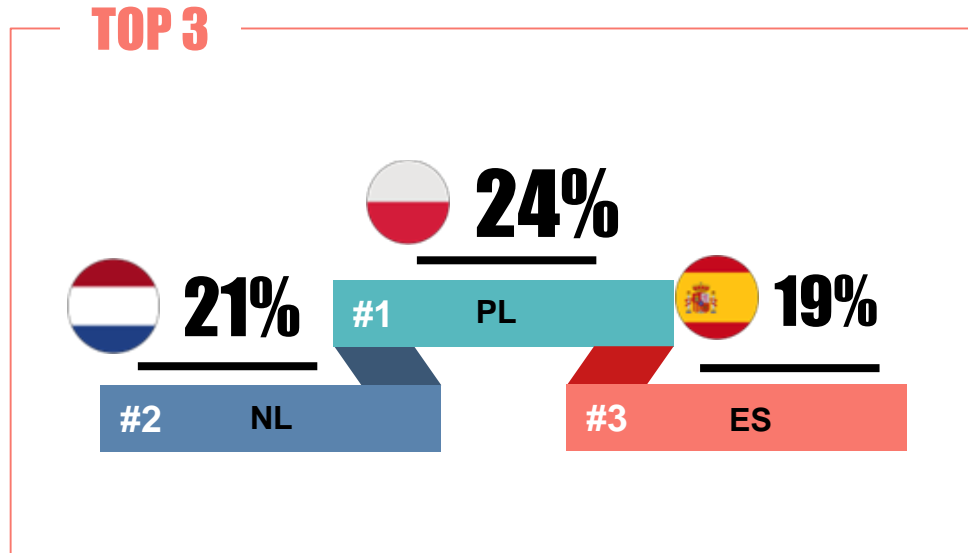











E23a and E23c. Have you implemented Telematics within your fleet...
 Basis: companies with corporate vehicles = 100%

Proportion of companies having implemented telematics in their fleet

YES, FOR ALL OR PART
OF THE FLEET

All vehicles (cars + LCVs)



#4	 UK	17%
#5	 BE	16%
#6	 CZ	16%
#7	 LU	13%
#8	 PT	12%
#9	 DE	9%
#10	 CH	8%
#11	 IT	8%
#12	 FR	7%

PROPORTION OF COMPANIES USING TELEMATICS

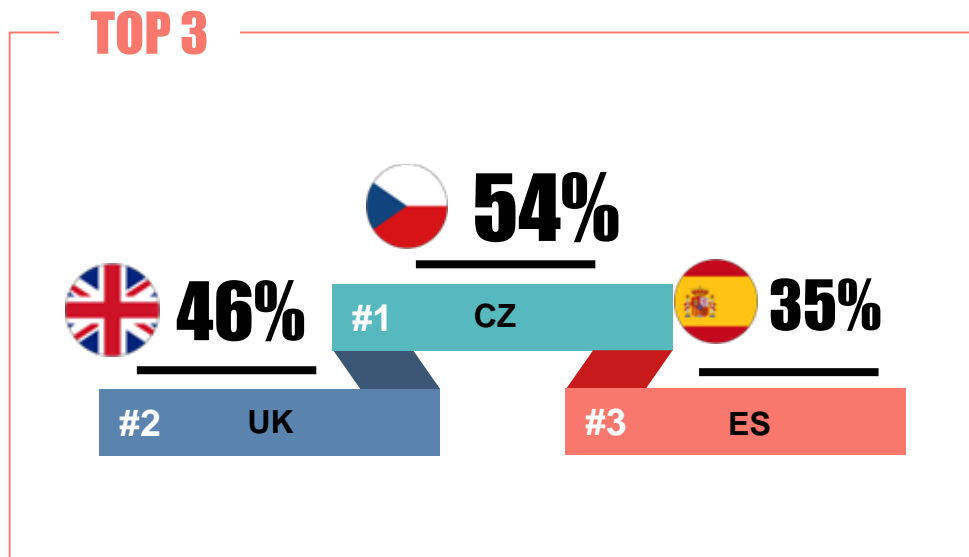
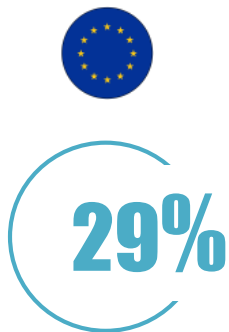


E23a and E23c. Have you implemented Telematics within your fleet...
Basis: companies with corporate vehicles = 100%

Proportion of companies having implemented telematics in their fleet

YES, FOR ALL OR PART
OF THE FLEET

All vehicles (cars + LCVs)



#4		NL	34%
#5		PL	30%
#6		PT	29%
#7		LU	26%
#8		IT	26%
#9		CH	19%
#10		FR	17%
#11		BE	14%
#12		DE	14%



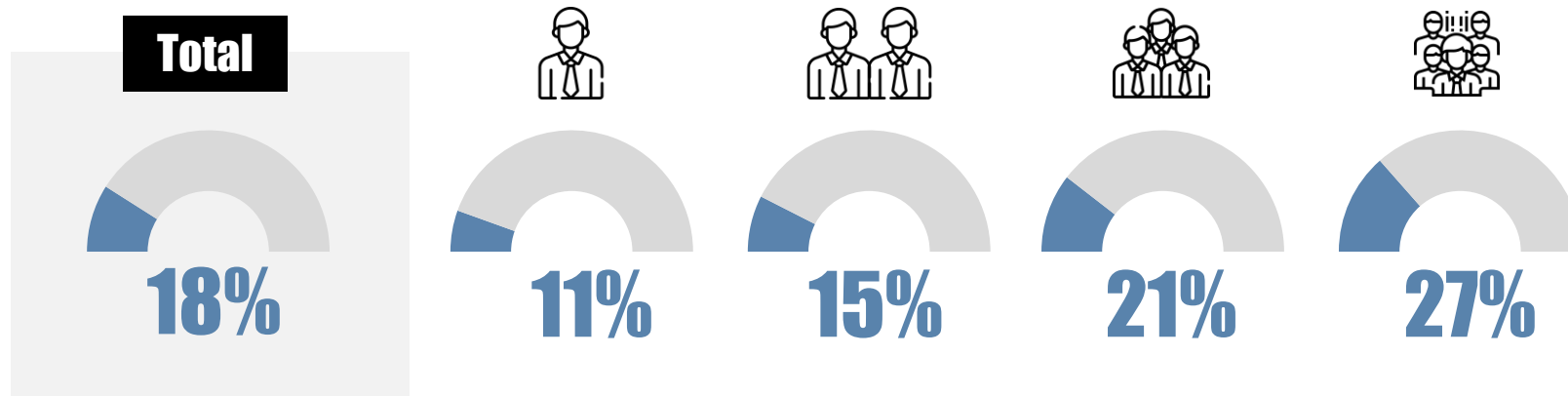
PROPORTION OF COMPANIES USING TELEMATICS

E23a and E23c. Have you implemented Telematics within your fleet...
Basis: companies with corporate vehicles and having at least a car= 100%

Proportion of companies having implemented telematics in their fleet

YES, FOR ALL OR PART
OF THE FLEET

With regards to cars



The total Europe take into consideration the questions E23a and E23c

Portugal excluded / question not asked

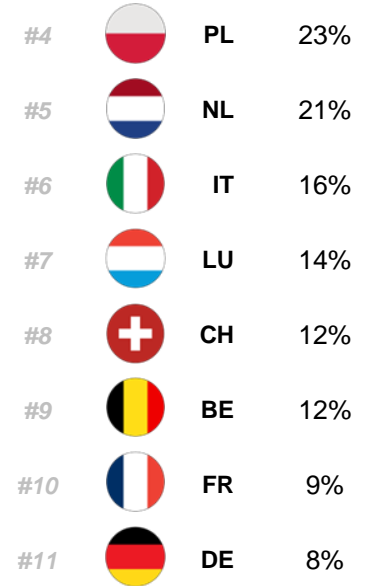
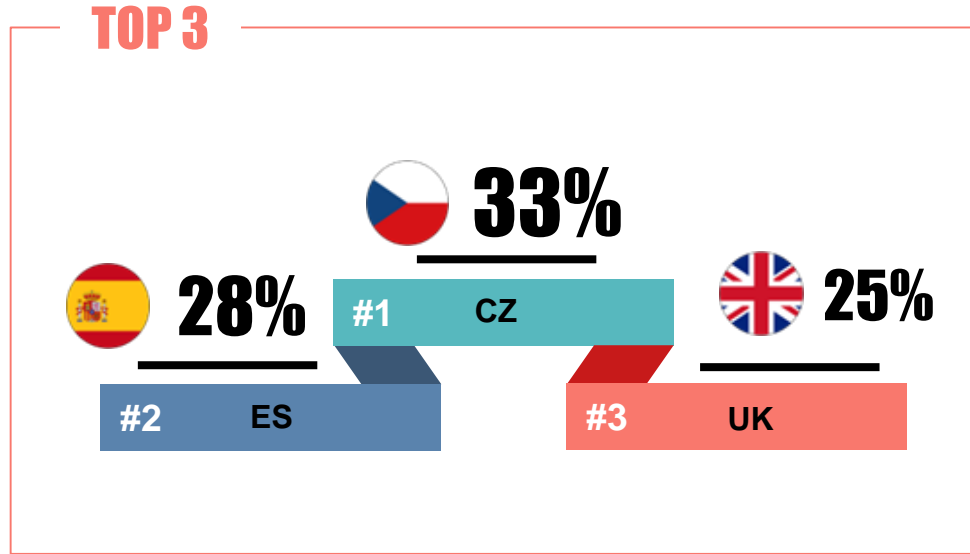


USE OF TELEMATICS with regards to cars

E23a and E23c. Have you implemented Telematics within your fleet...
Basis: companies with corporate vehicles and having at least a car= 100%

Proportion of companies having implemented telematics in their fleet

YES, FOR ALL OR PART
OF THE FLEET



Portugal excluded / question not asked



USE OF TELEMATICS

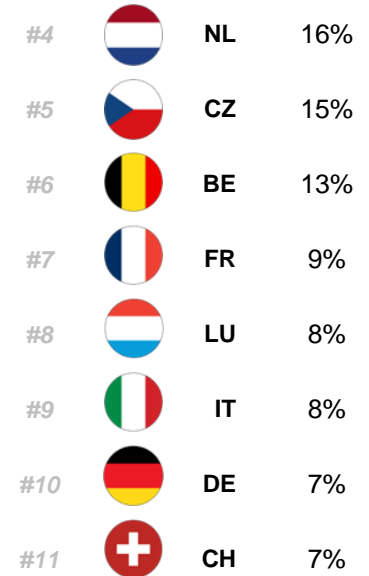
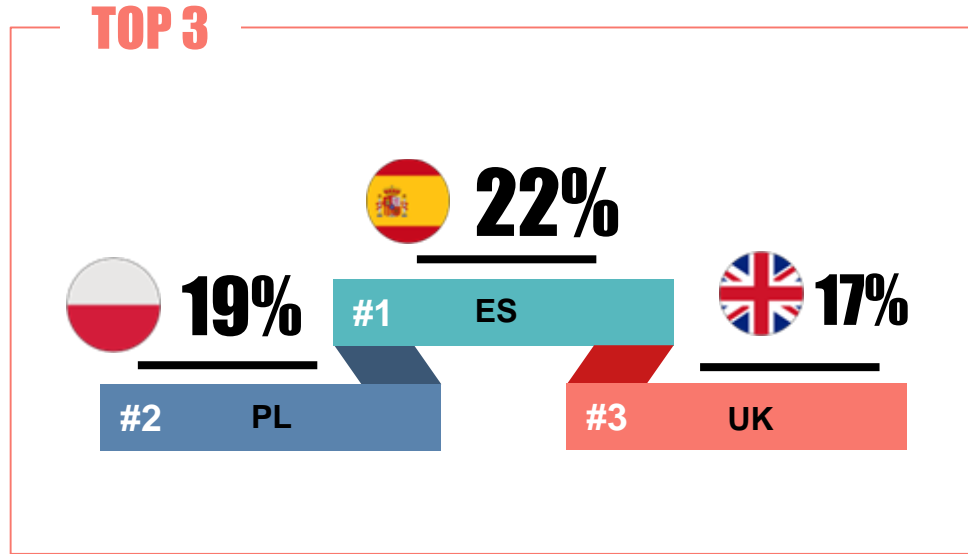
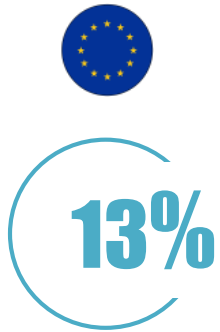
with regards to cars

E23a and E23c. Have you implemented Telematics within your fleet...
 Basis: companies with corporate vehicles and having at least a car= 100%



Proportion of companies having implemented telematics in their fleet

YES, FOR ALL OR PART
OF THE FLEET



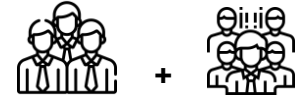
Portugal excluded / question not asked



USE OF TELEMATICS

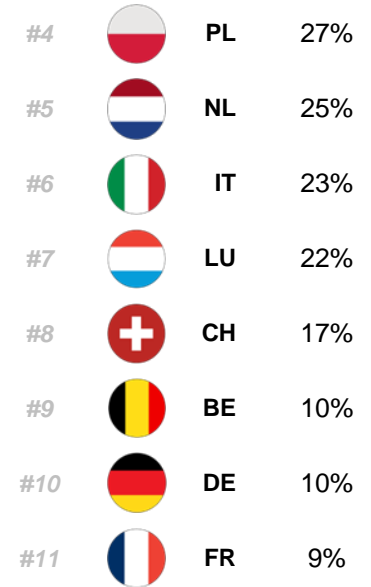
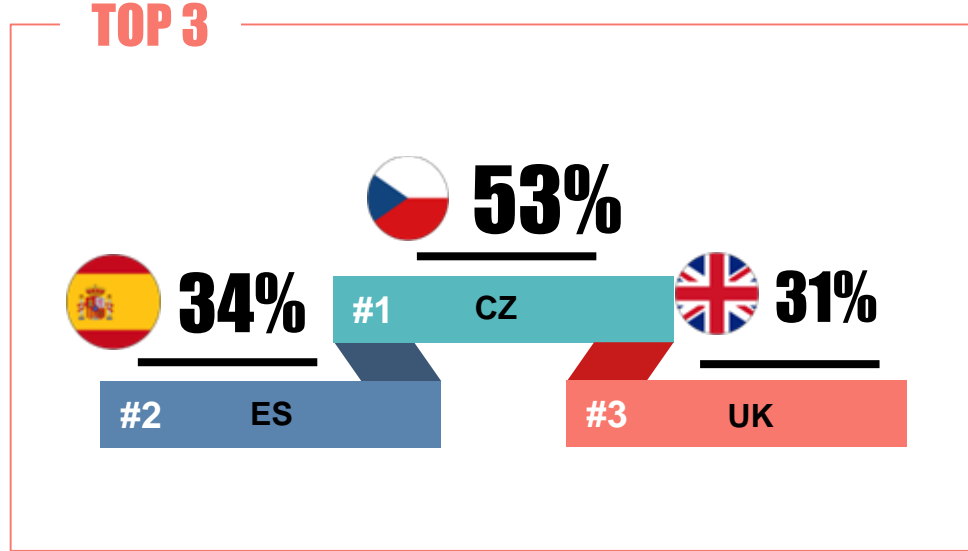
with regards to cars

E23a and E23c. Have you implemented Telematics within your fleet...
Basis: companies with corporate vehicles and having at least a car= 100%



Proportion of companies having implemented telematics in their fleet

YES, FOR ALL OR PART
OF THE FLEET



Portugal excluded / question not asked



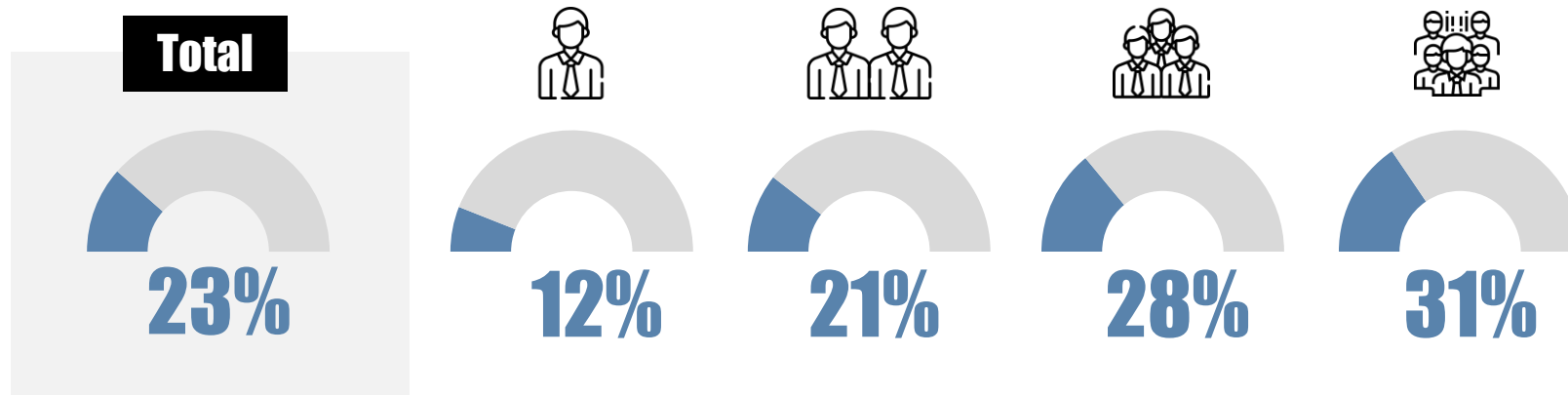
PROPORTION OF COMPANIES USING TELEMATICS

with regards to LCVs

E23a and E23c. Have you implemented Telematics within your fleet...
Basis: companies with corporate vehicles and having at least a LCV= 100%

Proportion of companies having implemented telematics in their fleet

YES, FOR ALL OR PART
OF THE FLEET



The total Europe take into consideration the questions E23a and E23c



PROPORTION OF COMPANIES USING TELEMATICS

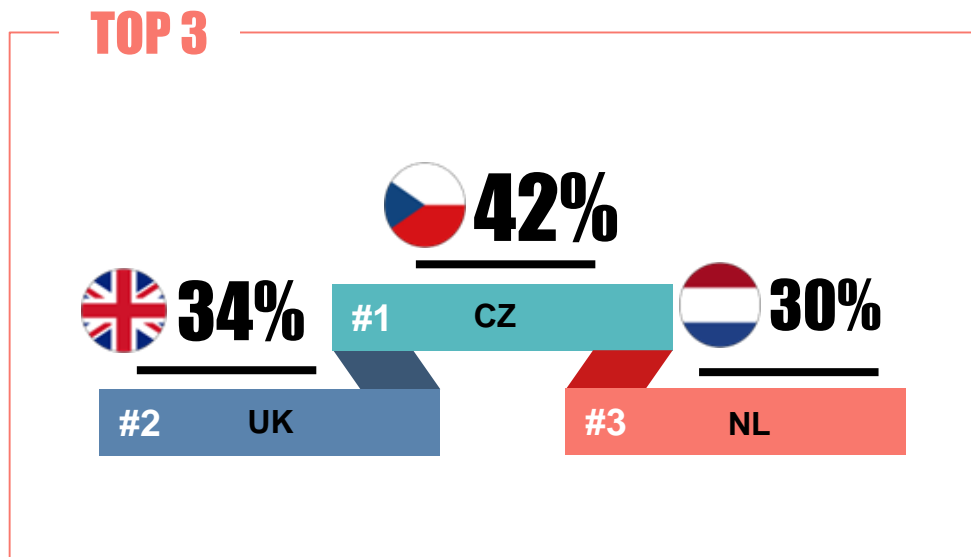
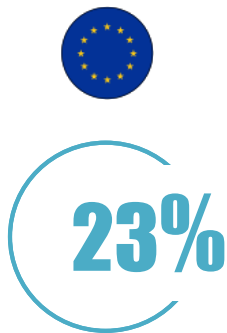
with regards to LCVs

E23a and E23c. Have you implemented Telematics within your fleet...

Basis: companies with corporate vehicles and having at least a LCV= 100%

Proportion of companies having implemented telematics in their fleet

YES, FOR ALL OR PART
OF THE FLEET



Portugal excluded / question not asked



PROPORTION OF COMPANIES USING TELEMATICS

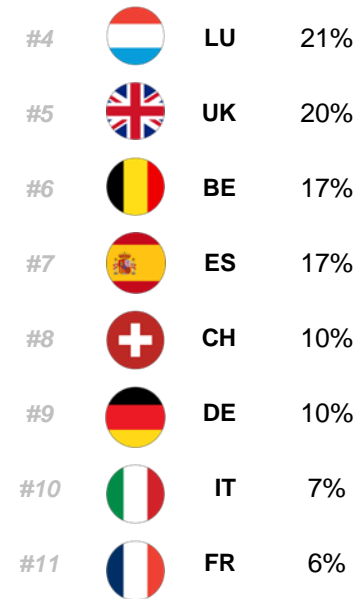
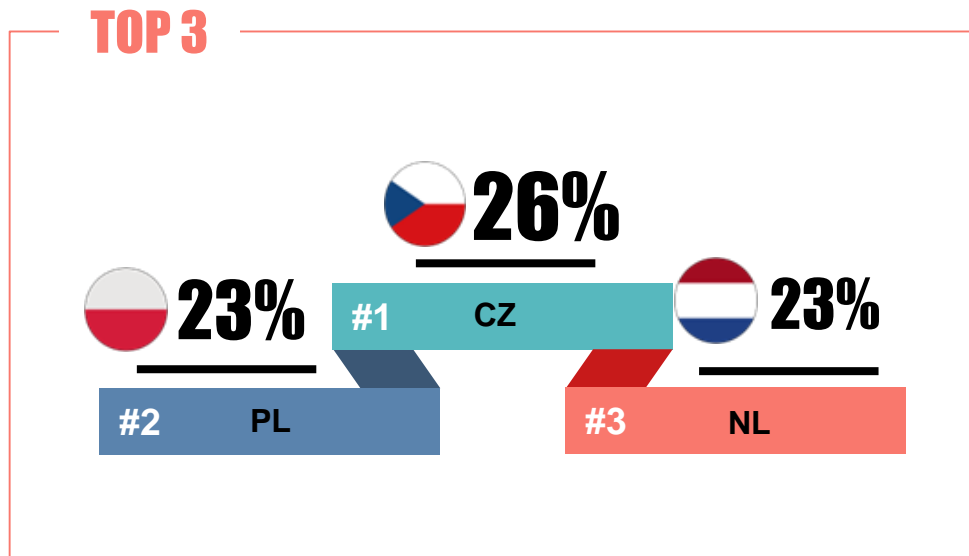
with regards to LCVs



E23a and E23c. Have you implemented Telematics within your fleet...
 Basis: companies with corporate vehicles and having at least a LCV= 100%

Proportion of companies having implemented telematics in their fleet

YES, FOR ALL OR PART
OF THE FLEET



Portugal excluded / question not asked



PROPORTION OF COMPANIES USING TELEMATICS with regards to LCVs

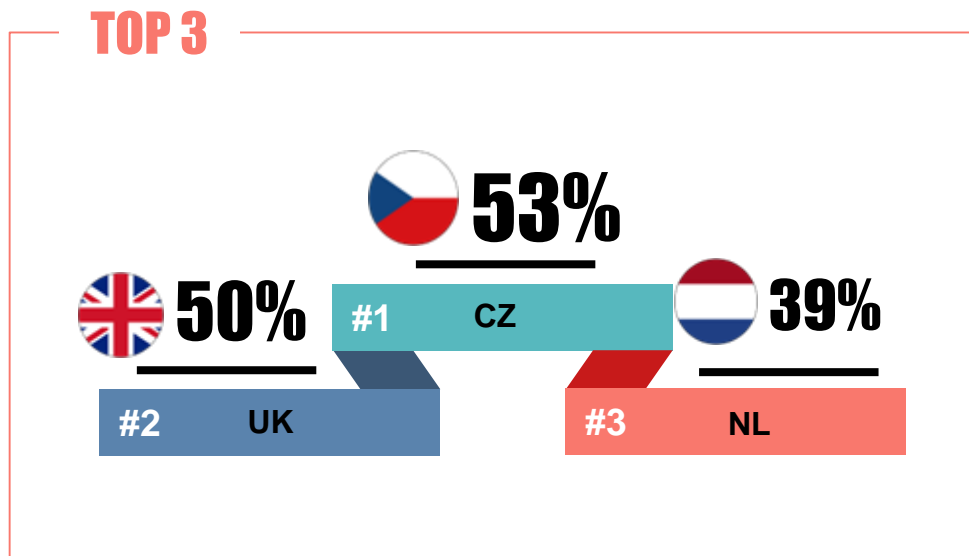


E23a and E23c. Have you implemented Telematics within your fleet...

Basis: companies with corporate vehicles and having at least a LCV= 100%

Proportion of companies having implemented telematics in their fleet

YES, FOR ALL OR PART
OF THE FLEET



Portugal excluded / question not asked

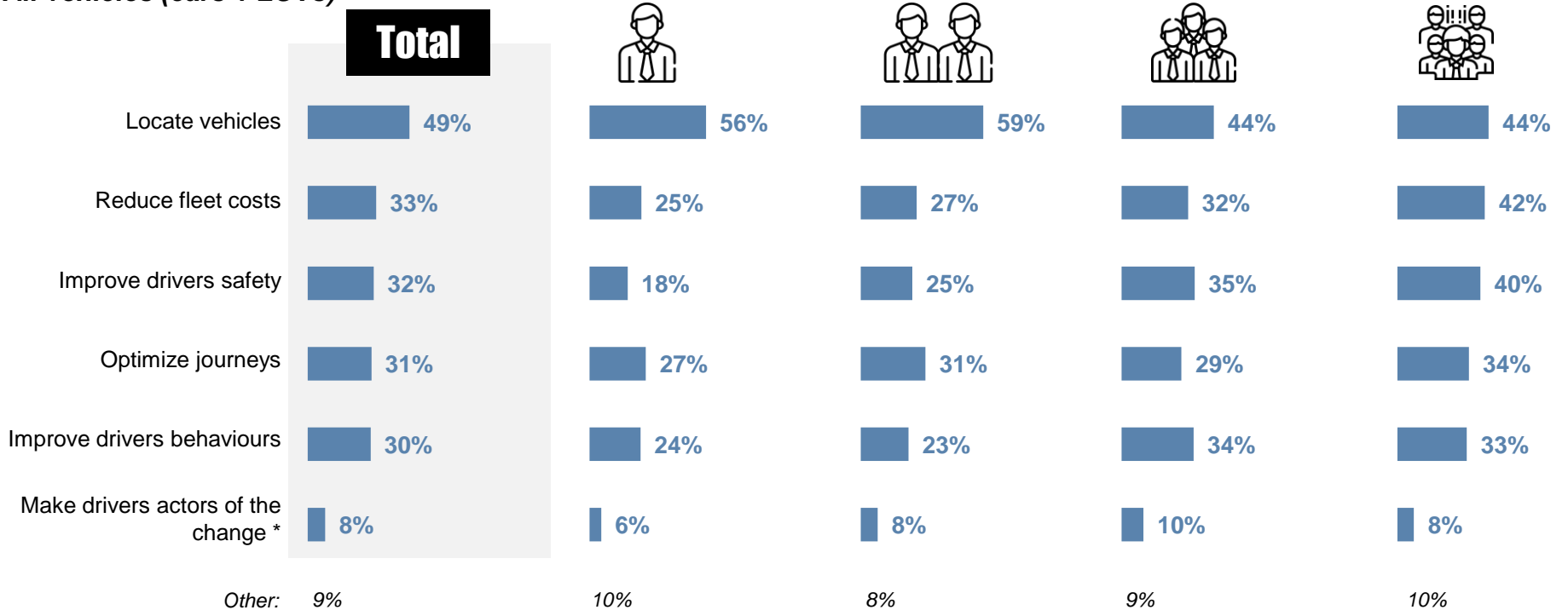
PURPOSES FOR USING TELEMATICS

E25ab. What are the two main reasons you use telematics in your company fleet?

E25. (PT) For which reasons do you use telematics within your company?

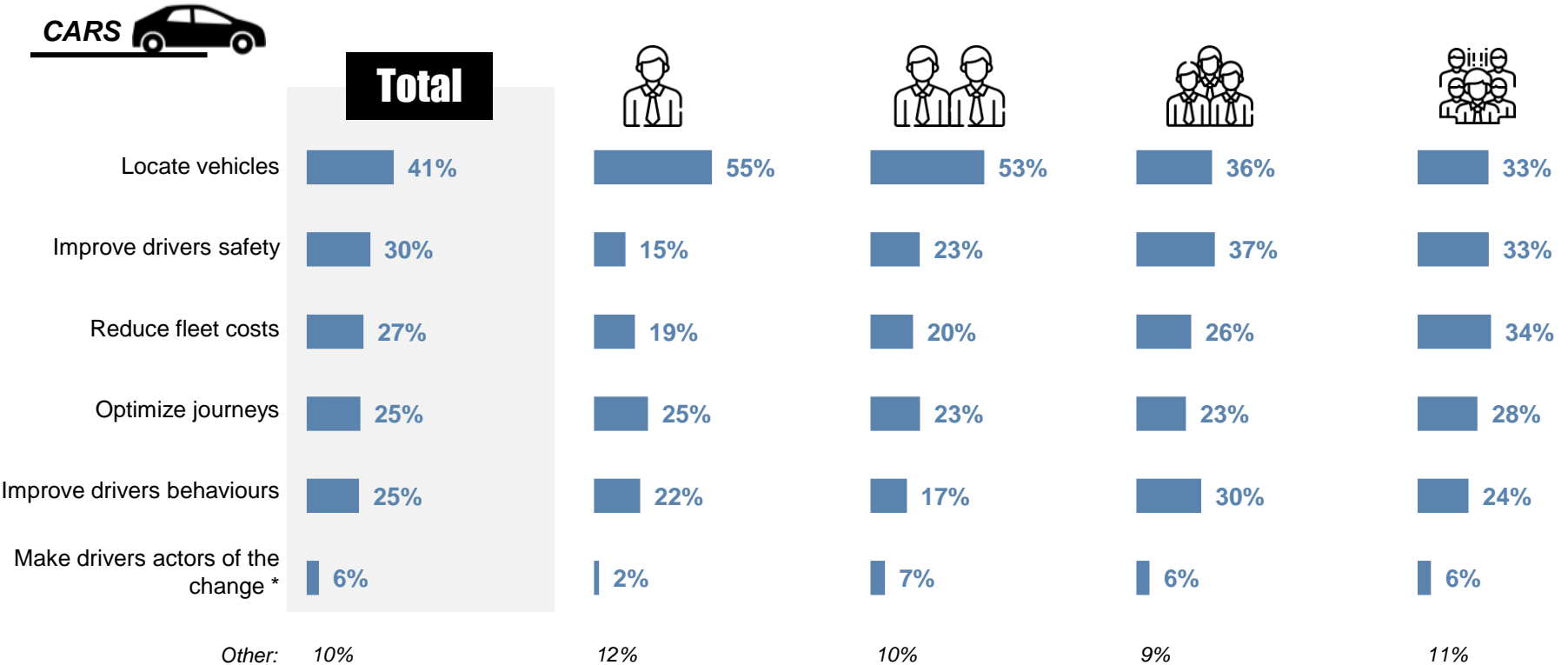
Basis: Companies having implemented telematics = 100%

All vehicles (cars + LCVs)



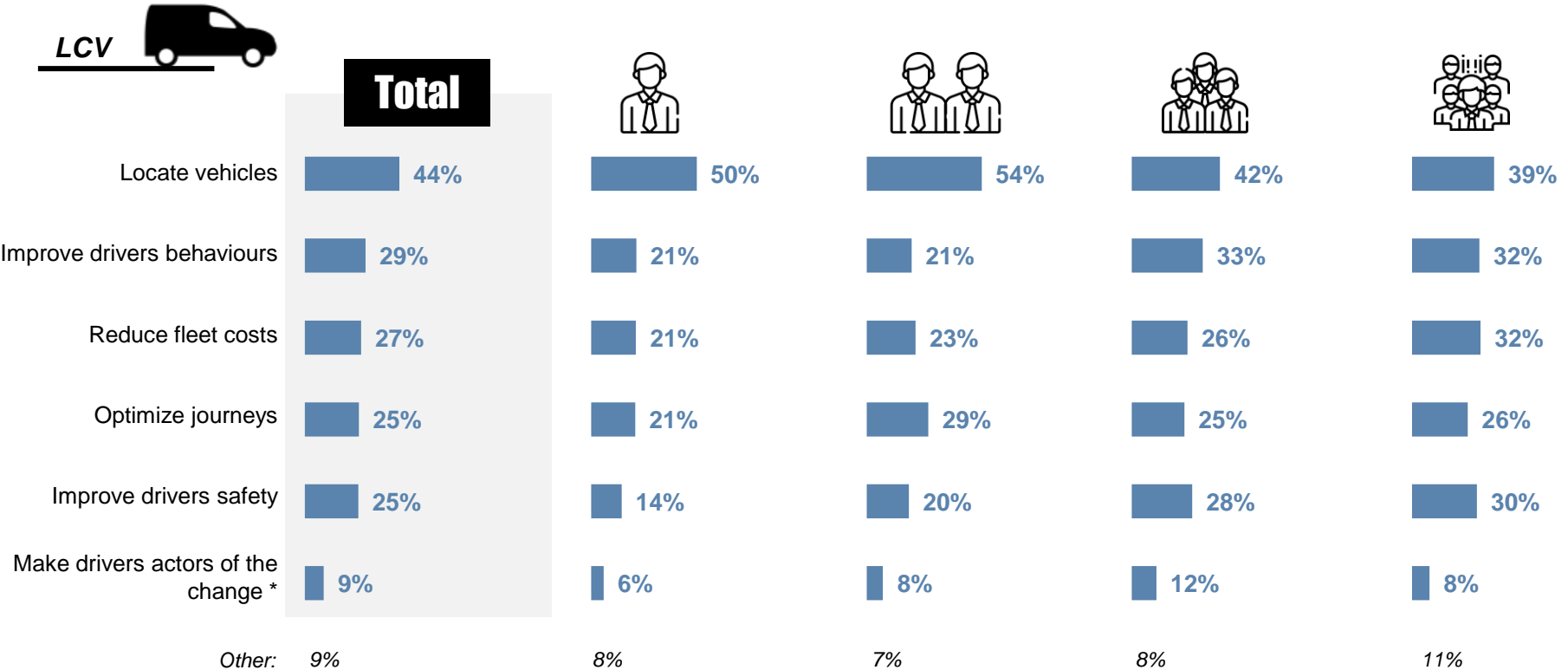
PURPOSES FOR USING TELEMATICS

E25ab. What are the two main reasons you use telematics in your company fleet?
 Basis: Companies with cars in fleet and having implemented telematics = 100%



PURPOSES FOR USING TELEMATICS

E25ab. What are the two main reasons you use telematics in your company fleet?
 Basis: Companies with LCVs in fleet and having implemented telematics = 100%



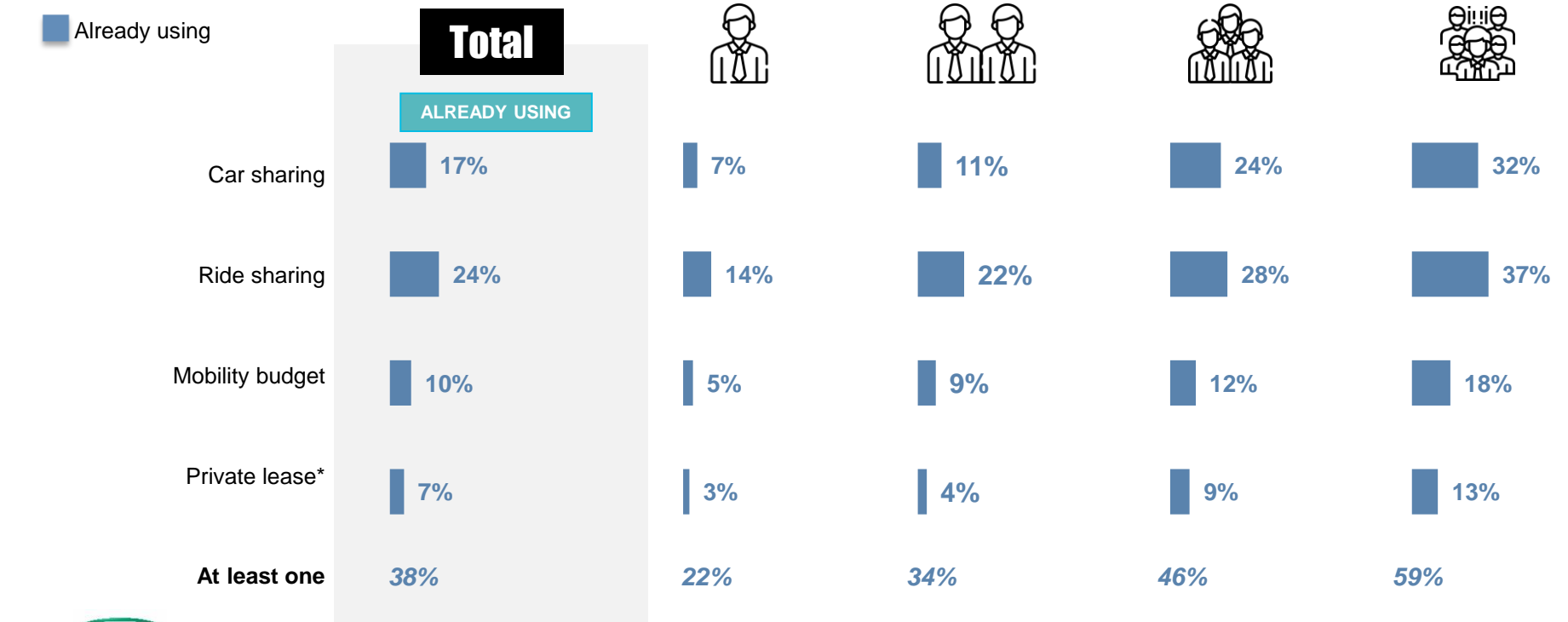
V

PERSPECTIVE IN TERMS OF CORPORATE MOBILITY

USE OF MOBILITY ALTERNATIVES

MM9. in the next 3 years, would you consider using the following alternatives?
 Basis: companies with corporate vehicles = 100%

Proportion of companies already using the following mobility alternatives



DEVELOPMENT POTENTIAL OF MOBILITY ALTERNATIVES

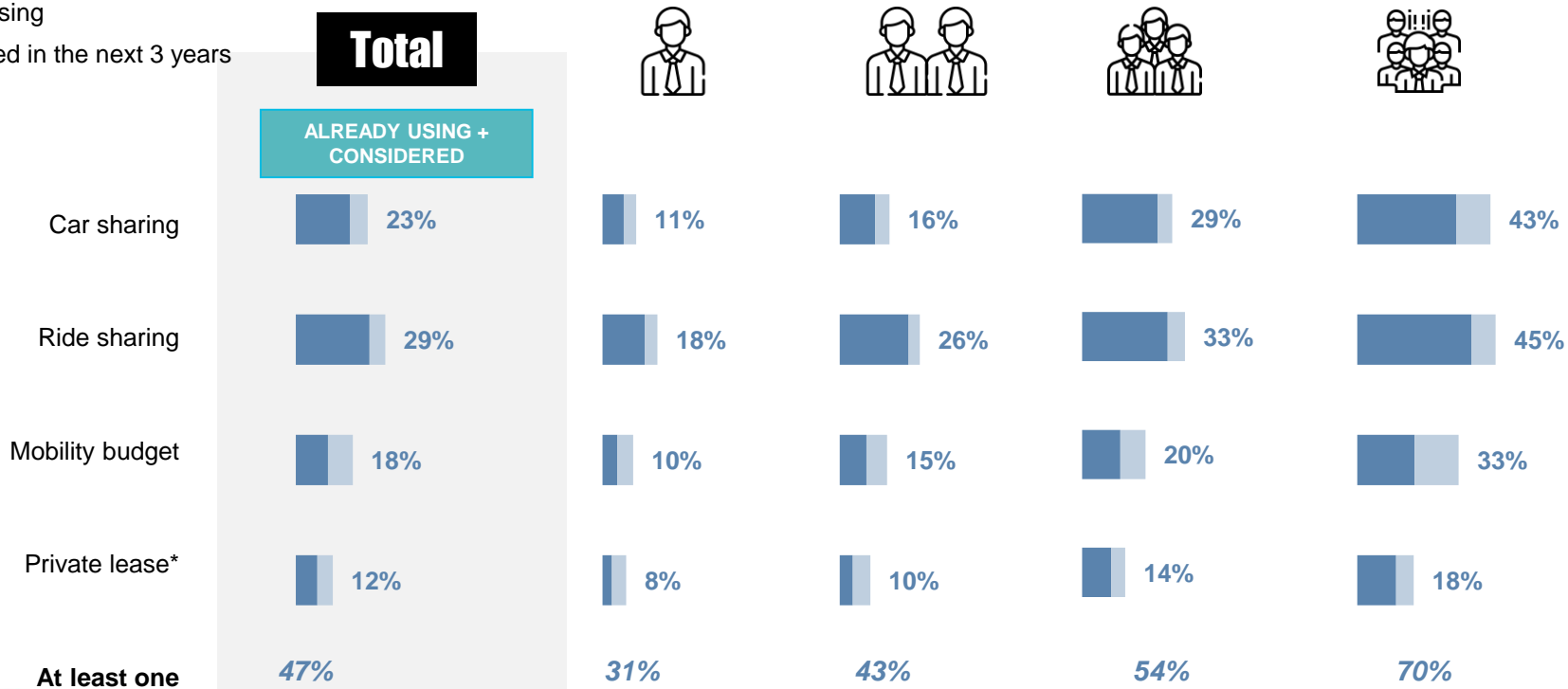
MM9. in the next 3 years, would you consider using the following alternatives?

Basis: companies with corporate vehicles = 100%

Proportion of companies already using the following mobility alternatives

Already using

Considered in the next 3 years



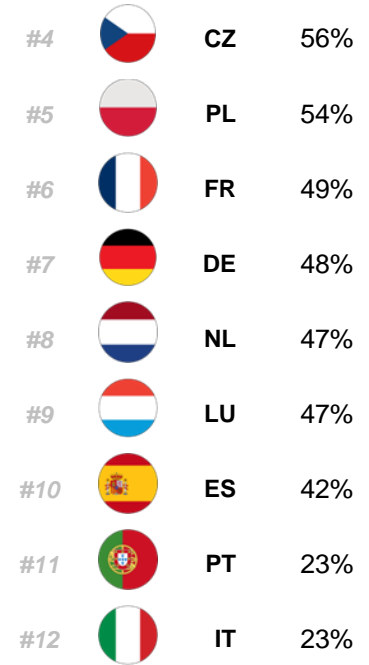
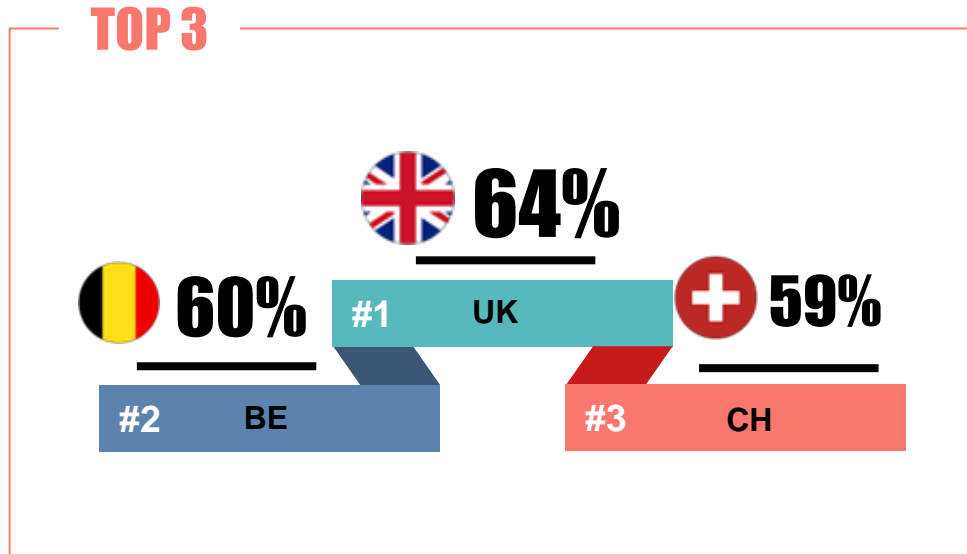
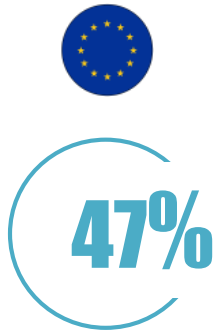
DEVELOPMENT POTENTIAL OF MOBILITY ALTERNATIVES

Car sharing, Ride sharing, Mobility budget or Private lease

MM9. in the next 3 years, would you consider using the following alternatives?
 Basis: companies with corporate vehicles = 100%

Proportion of companies already using the following mobility alternatives

% ALREADY USING
 + CONSIDERED IN THE NEXT 3 YEARS



DEVELOPMENT POTENTIAL OF MOBILITY ALTERNATIVES

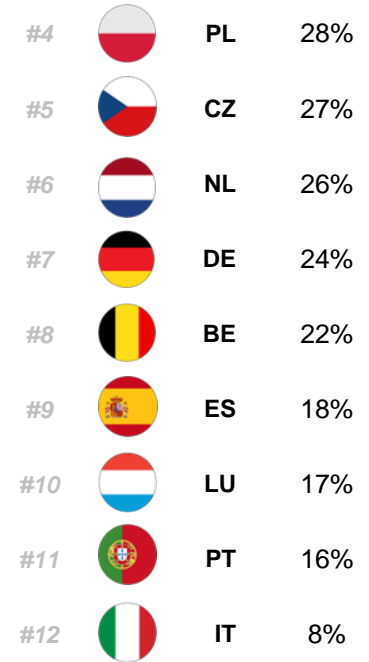
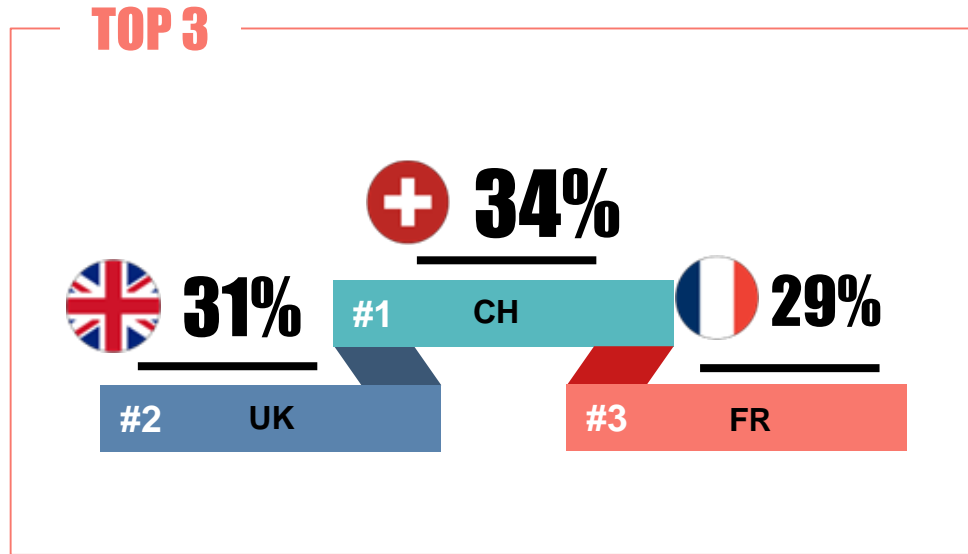
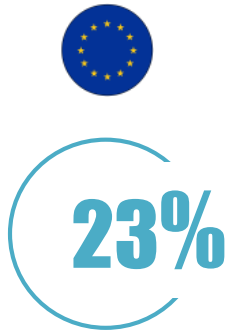
Car sharing

MM9. in the next 3 years, would you consider using the following alternatives?

Basis: companies with corporate vehicles = 100%

Proportion of companies already using the following mobility alternatives

% ALREADY USING
+ CONSIDERED IN THE NEXT 3 YEARS



DEVELOPMENT POTENTIAL OF MOBILITY ALTERNATIVES

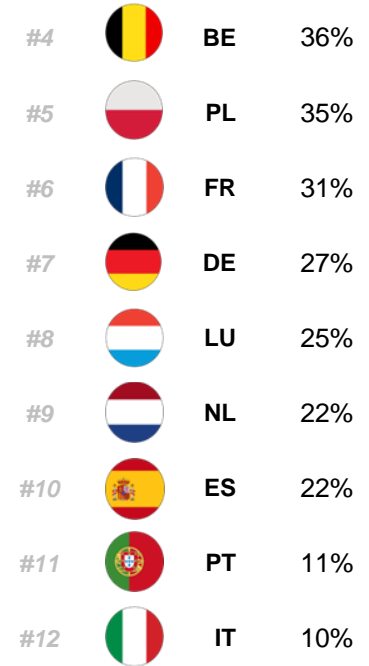
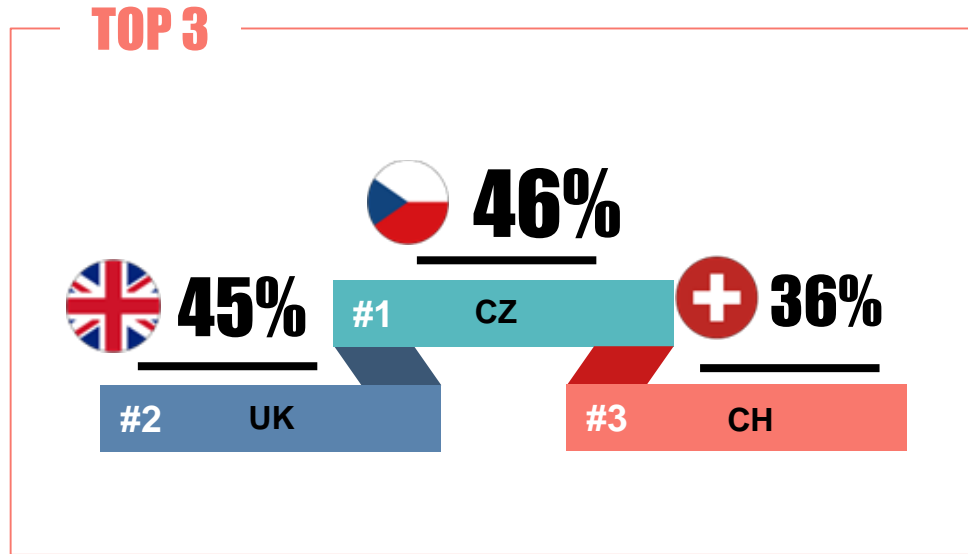
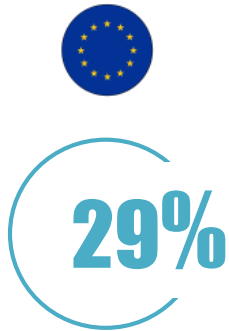
Ride sharing

MM9. in the next 3 years, would you consider using the following alternatives?

Basis: companies with corporate vehicles = 100%

Proportion of companies already using the following mobility alternatives

% ALREADY USING
+ CONSIDERED IN THE NEXT 3 YEARS



DEVELOPMENT POTENTIAL OF MOBILITY ALTERNATIVES

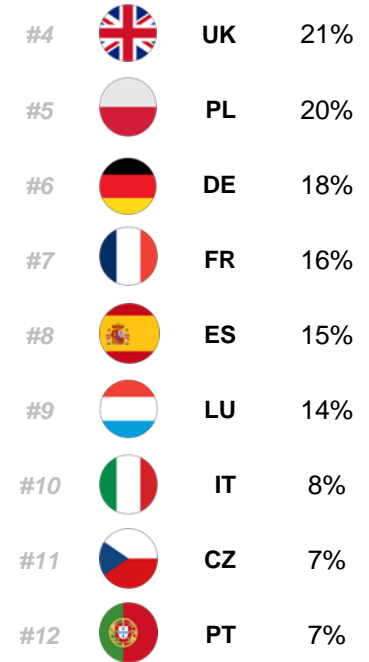
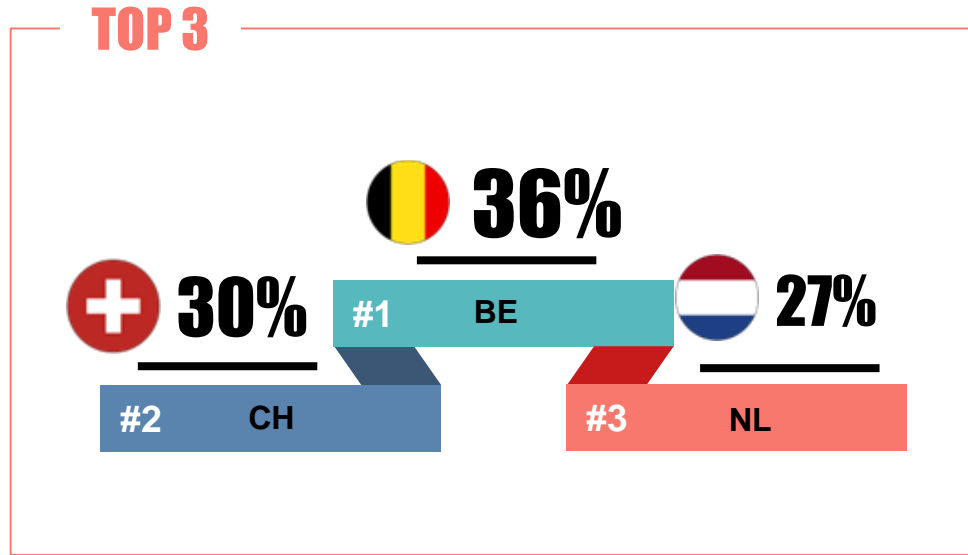
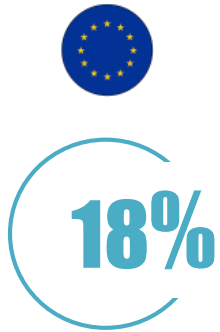
Mobility budget

MM9. in the next 3 years, would you consider using the following alternatives?

Basis: companies with corporate vehicles = 100%

Proportion of companies already using the following mobility alternatives

% ALREADY USING
+ CONSIDERED IN THE NEXT 3 YEARS



DEVELOPMENT POTENTIAL OF MOBILITY ALTERNATIVES

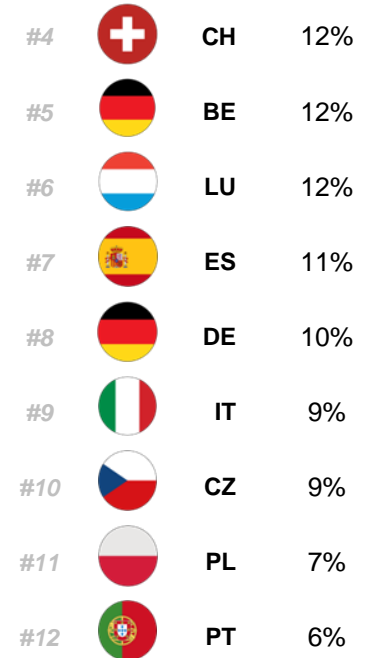
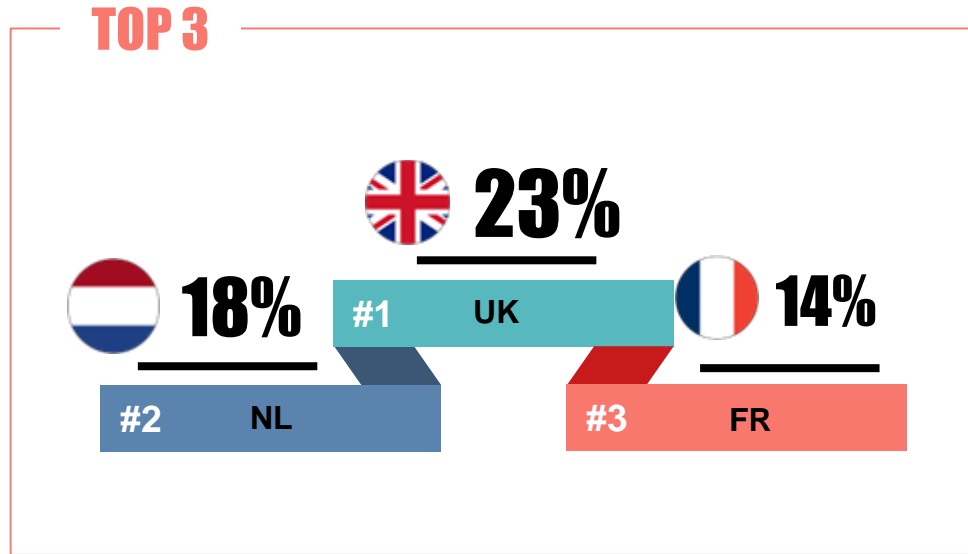
Private lease

MM9. in the next 3 years, would you consider using the following alternatives?

Basis: companies with corporate vehicles = 100%

Proportion of companies already using the following mobility alternatives

% ALREADY USING
+ CONSIDERED IN THE NEXT 3 YEARS



DEVELOPMENT POTENTIAL OF MOBILITY ALTERNATIVES

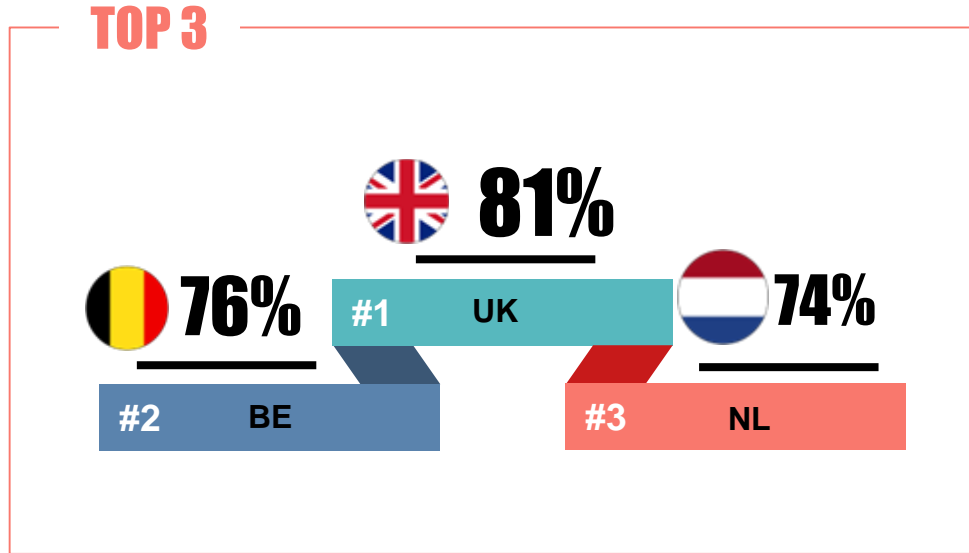
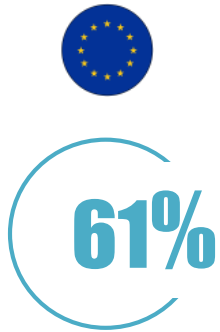
Car sharing, Ride sharing, Mobility budget or Private lease

MM9. in the next 3 years, would you consider using the following alternatives?
 Basis: companies with corporate vehicles = 100%



Proportion of companies already using the following mobility alternatives

**% ALREADY USING
 + CONSIDERED IN THE NEXT 3 YEARS**



#4		CZ	73%
#5		FR	71%
#6		CH	71%
#7		PL	68%
#8		DE	59%
#9		LU	55%
#10		ES	49%
#11		IT	28%
#12		PT	25%

DEVELOPMENT POTENTIAL OF MOBILITY ALTERNATIVES

Car sharing

MM9. in the next 3 years, would you consider using the following alternatives?
Basis: companies with corporate vehicles = 100%

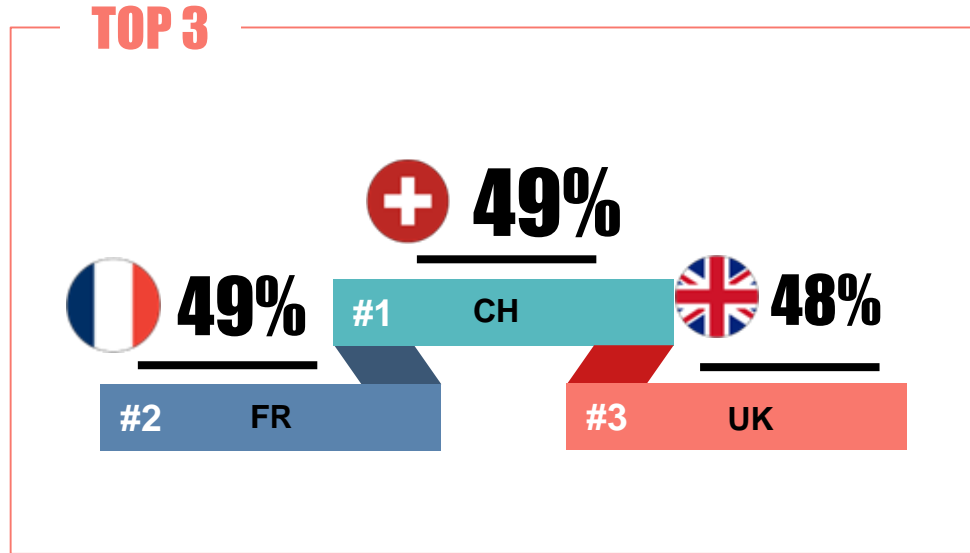
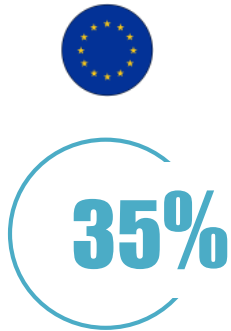


+



Proportion of companies already using the following mobility alternatives

% ALREADY USING
+ CONSIDERED IN THE NEXT 3 YEARS



#4		NL	45%
#5		CZ	43%
#6		BE	36%
#7		DE	36%
#8		PL	35%
#9		ES	24%
#10		LU	24%
#11		PT	20%
#12		IT	11%

DEVELOPMENT POTENTIAL OF MOBILITY ALTERNATIVES

Ride sharing

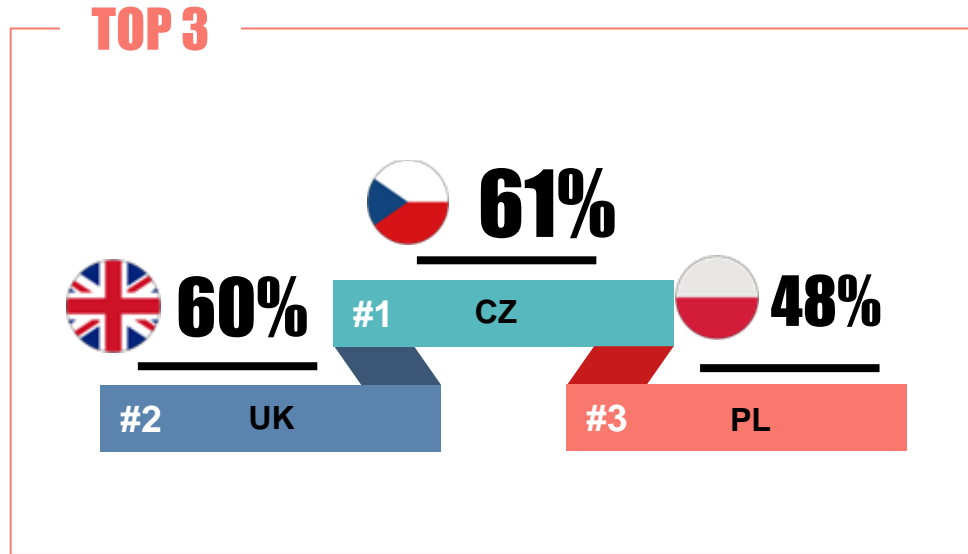
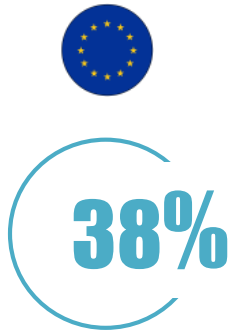
MM9. in the next 3 years, would you consider using the following alternatives?

Basis: companies with corporate vehicles = 100%



Proportion of companies already using the following mobility alternatives

% ALREADY USING
+ CONSIDERED IN THE NEXT 3 YEARS



#4		BE	47%
#5		FR	46%
#6		CH	45%
#7		DE	37%
#8		NL	31%
#9		LU	31%
#10		ES	25%
#11		PT	14%
#12		IT	13%

DEVELOPMENT POTENTIAL OF MOBILITY ALTERNATIVES

Mobility budget

MM9. in the next 3 years, would you consider using the following alternatives?

Basis: companies with corporate vehicles = 100%

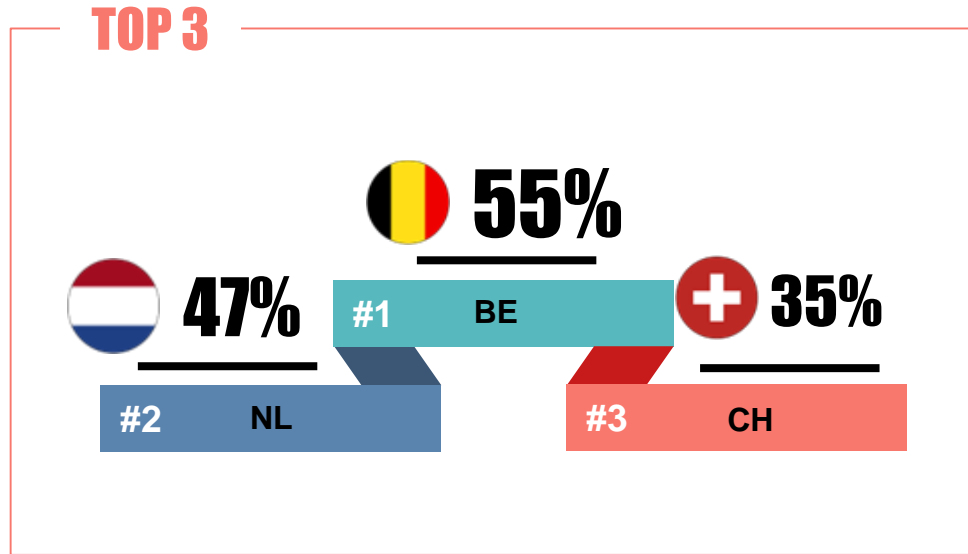


+



Proportion of companies already using the following mobility alternatives

% ALREADY USING
+ CONSIDERED IN THE NEXT 3 YEARS



#4		28%
#5		27%
#6		25%
#7		24%
#8		21%
#9		16%
#10		12%
#11		10%
#12		7%

DEVELOPMENT POTENTIAL OF MOBILITY ALTERNATIVES

Private lease

MM9. in the next 3 years, would you consider using the following alternatives?

Basis: companies with corporate vehicles = 100%

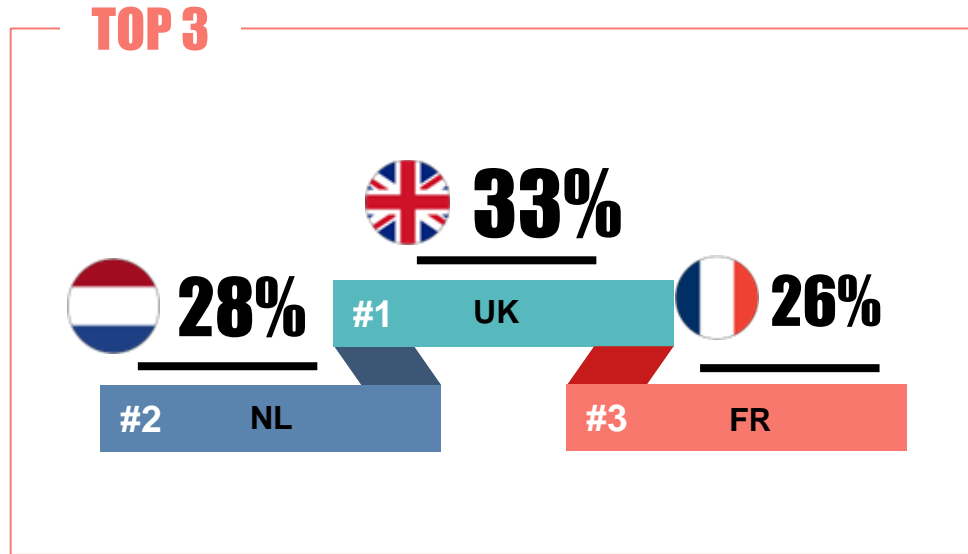
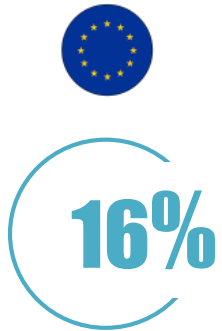


+



Proportion of companies already using the following mobility alternatives

% ALREADY USING
+ CONSIDERED IN THE NEXT 3 YEARS

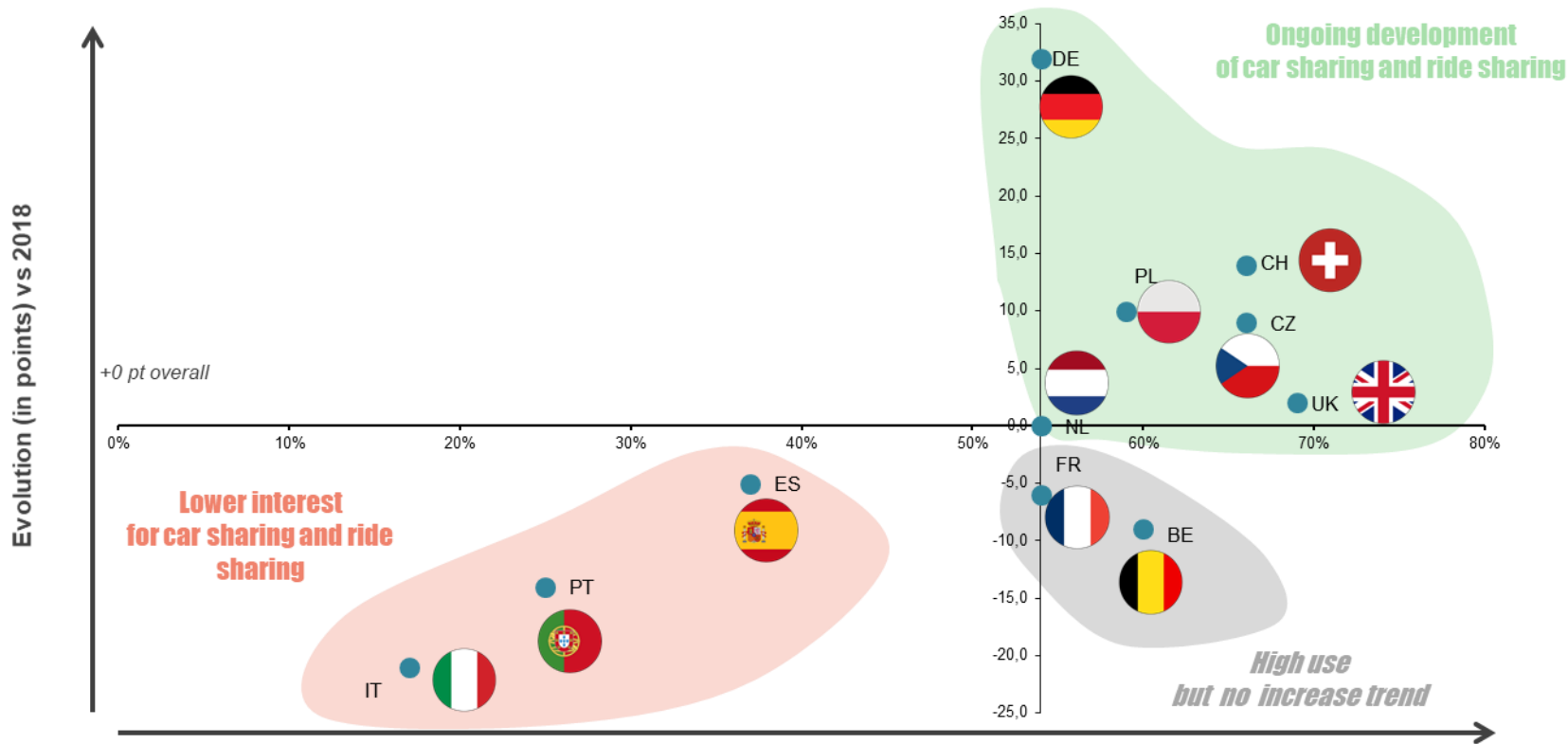


#4		BE	16%
#5		CZ	14%
#6		LU	13%
#7		ES	12%
#8		CH	12%
#9		IT	12%
#10		PL	10%
#11		DE	10%
#12		PT	5%



DEVELOPMENT POTENTIAL OF MOBILITY ALTERNATIVES

Car sharing, Ride sharing



Part of companies already using or considering to use at least one of the following alternative solutions (MM9):

Car sharing, Ride sharing

DEVELOPMENT POTENTIAL OF MOBILITY ALTERNATIVES

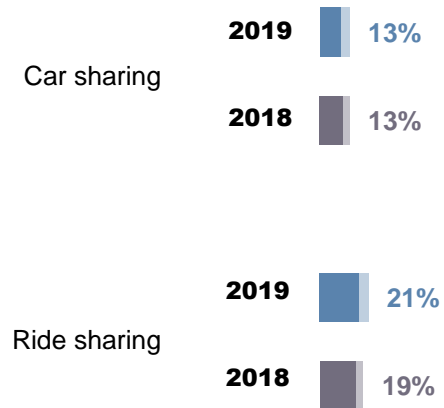
MM9. In the next 3 years, would you consider using the following alternatives? Already using, Considered in the next 3 years, Not interested
Basis: companies with corporate vehicles = 100%

Proportion of companies already using or considering to use in the next 3 years the following mobility alternatives



- Already using
- Considered in the next 3 years

ALREADY USING +
CONSIDERED



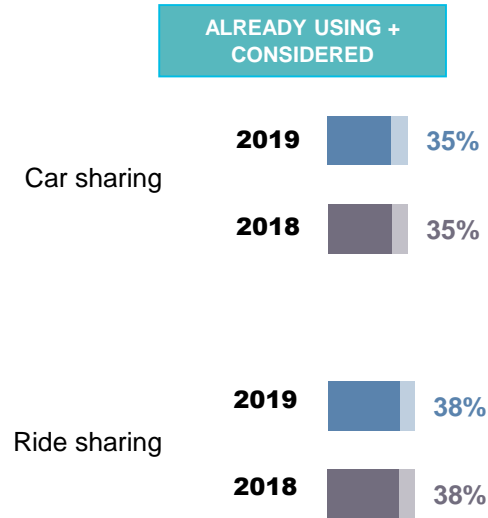
DEVELOPMENT POTENTIAL OF MOBILITY ALTERNATIVES

MM9. In the next 3 years, would you consider using the following alternatives? Already using, Considered in the next 3 years, Not interested
Basis: companies with corporate vehicles = 100%



Proportion of companies already using or considering to use in the next 3 years the following mobility alternatives

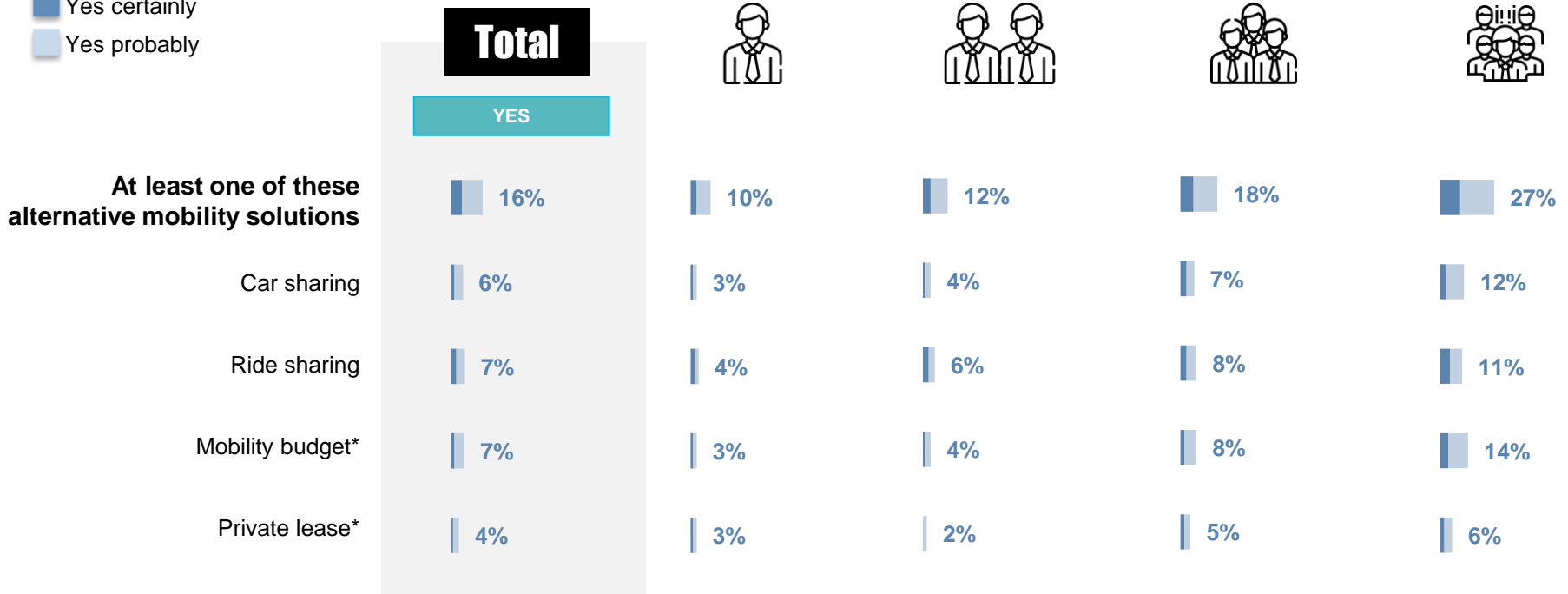
- Already using
- Considered in the next 3 years



PROPORTION OF COMPANIES READY TO GIVE UP ALL OR PART OF THEIR COMPANY CARS FOR ALTERNATIVE MOBILITY SOLUTIONS

MM10 and MM10b. And would you give up all or part of your company cars for such alternatives?
 Basis: companies with corporate vehicles = 100%

■ Yes certainly
■ Yes probably



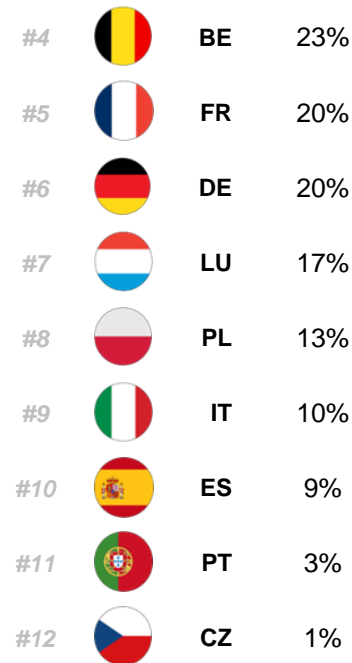
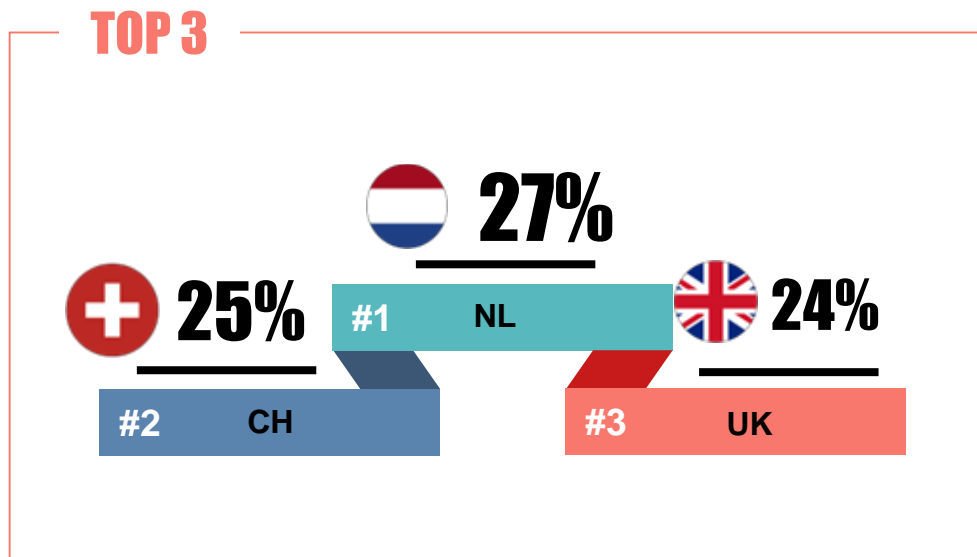
PROPORTION OF COMPANIES READY TO GIVE UP ALL OR PART OF THEIR COMPANY CARS FOR MOBILITY ALTERNATIVES

=> Car sharing, Ride sharing, Mobility budget or Private lease

MM10 and MM10b. And would you give up all or part of your company cars for such alternatives?

Basis: companies with corporate vehicles = 100%

% YES

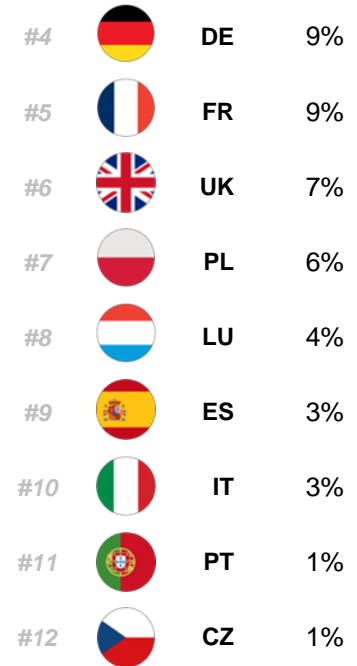
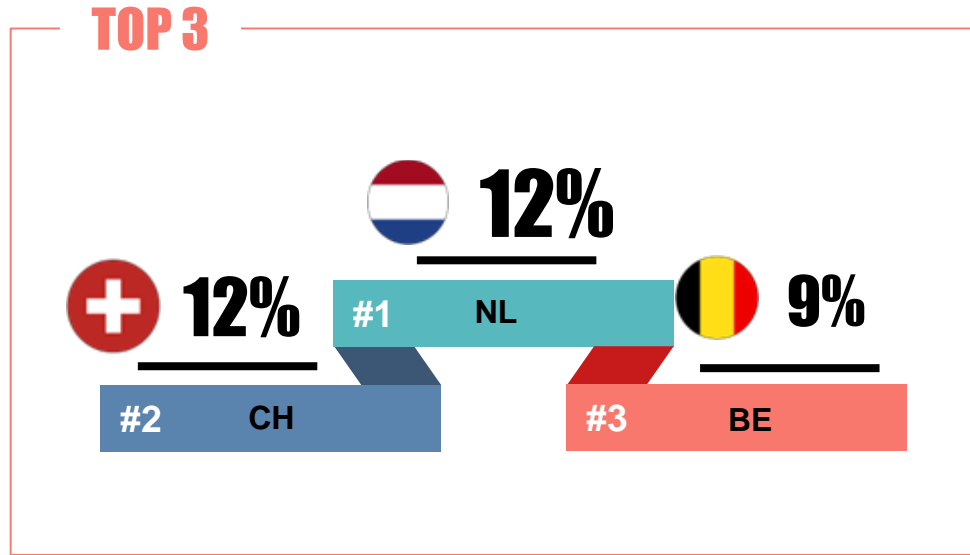


PROPORTION OF COMPANIES READY TO GIVE UP ALL OR PART OF THEIR COMPANY CARS FOR CAR SHARING

MM10 and MM10b. And would you give up all or part of your company cars for such alternatives?

Basis: companies with corporate vehicles = 100%

% YES

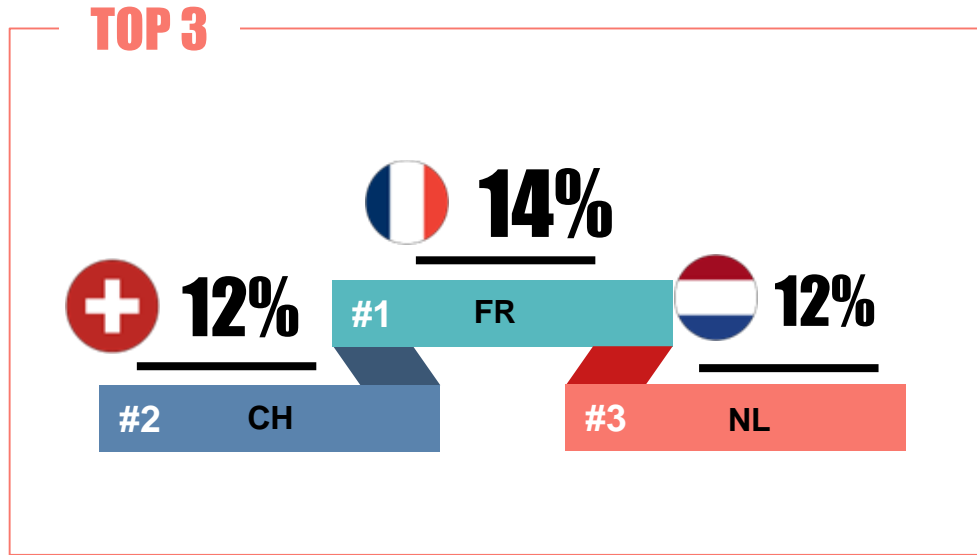


PROPORTION OF COMPANIES READY TO GIVE UP ALL OR PART OF THEIR COMPANY CARS FOR RIDE SHARING

MM10 and MM10b. And would you give up all or part of your company cars for such alternatives?

Basis: companies with corporate vehicles = 100%

% YES

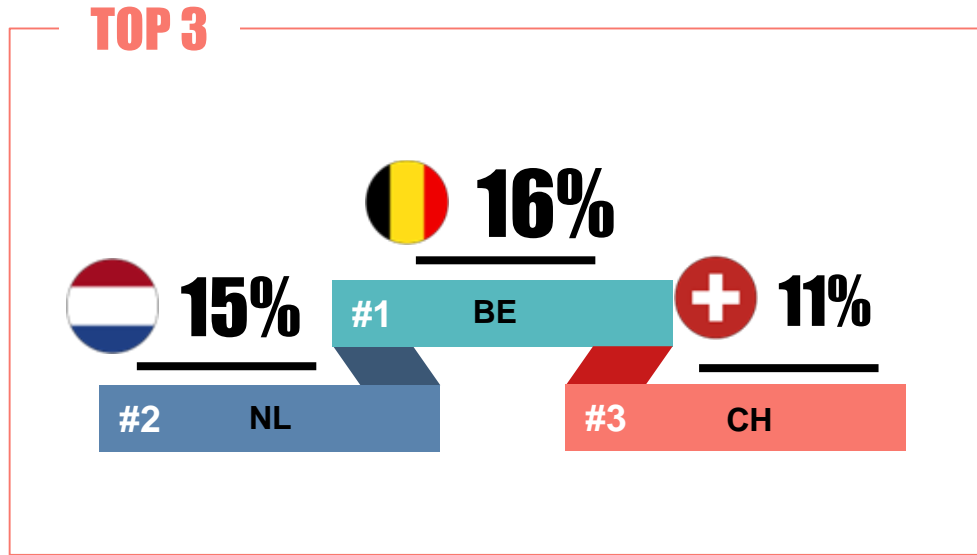











#4		BE	10%
#5		LU	9%
#6		UK	9%
#7		DE	9%
#8		ES	5%
#9		PL	4%
#10		IT	2%
#11		CZ	1%
#12		PT	1%

PROPORTION OF COMPANIES READY TO GIVE UP ALL OR PART OF THEIR COMPANY CARS FOR MOBILITY BUDGET

MM10 and MM10b. And would you give up all or part of your company cars for such alternatives?
 Basis: companies with corporate vehicles = 100%

% YES



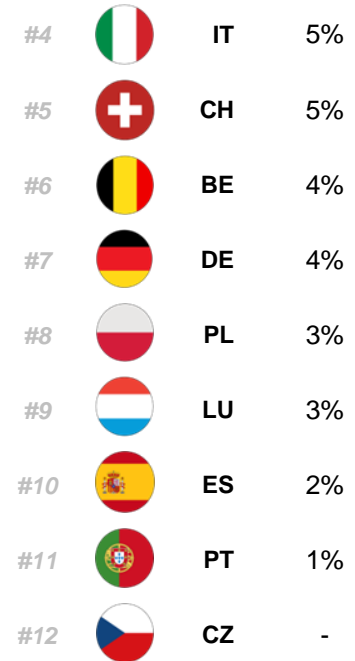
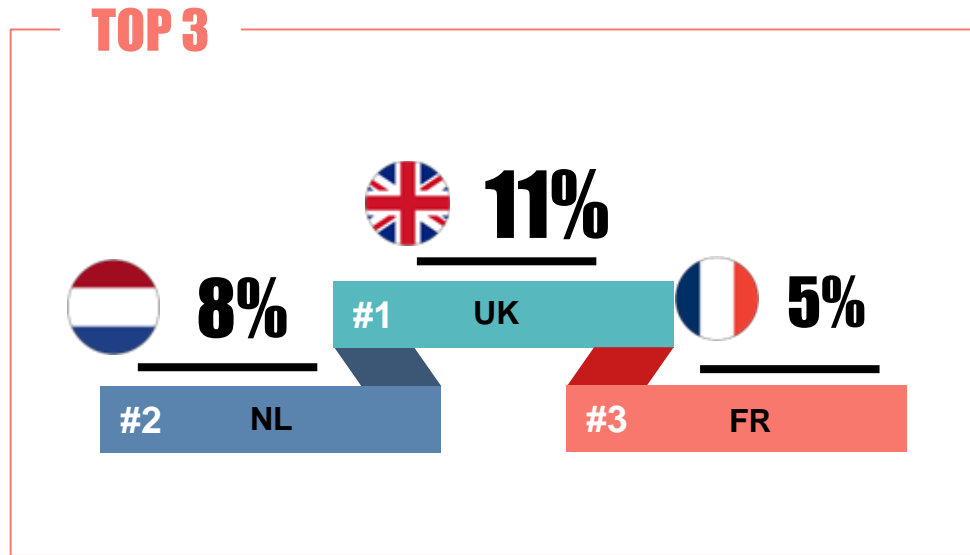
#4	 DE	8%
#5	 UK	8%
#6	 FR	8%
#7	 LU	7%
#8	 PL	4%
#9	 ES	3%
#10	 IT	3%
#11	 PT	1%
#12	 CZ	-

PROPORTION OF COMPANIES READY TO GIVE UP ALL OR PART OF THEIR COMPANY CARS FOR PRIVATE LEASE

MM10 and MM10b. And would you give up all or part of your company cars for such alternatives?

Basis: companies with corporate vehicles = 100%

% YES



PROPORTION OF COMPANIES READY TO GIVE UP ALL OR PART OF THEIR COMPANY CARS FOR MOBILITY ALTERNATIVES

=> Car sharing, Ride sharing, Mobility budget or Private lease

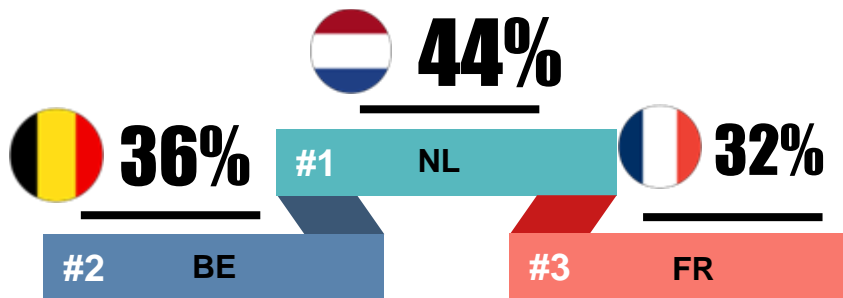
MM10 and MM10b. And would you give up all or part of your company cars for such alternatives?

Basis: companies with corporate vehicles = 100%

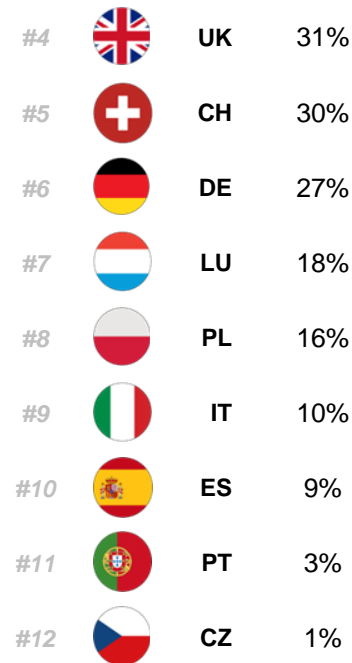


% YES

TOP 3



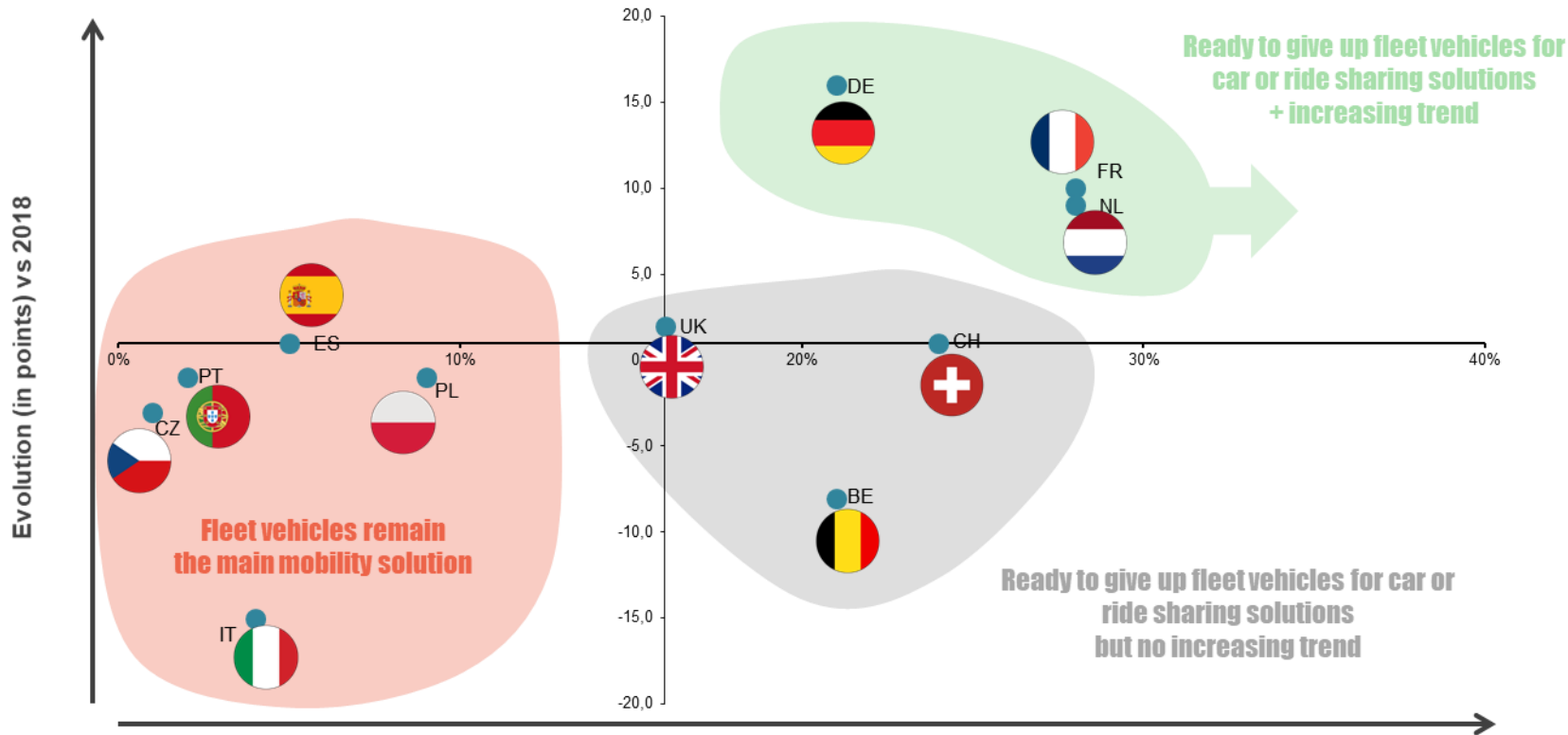
22%





PROPORTION OF COMPANIES READY TO GIVE UP ALL OR PART OF THEIR COMPANY CARS FOR MOBILITY ALTERNATIVES

Car sharing, Ride sharing



Part of companies ready to give up all or part of their company cars for mobility alternatives (MM10/MM10b):

Car sharing, Ride sharing

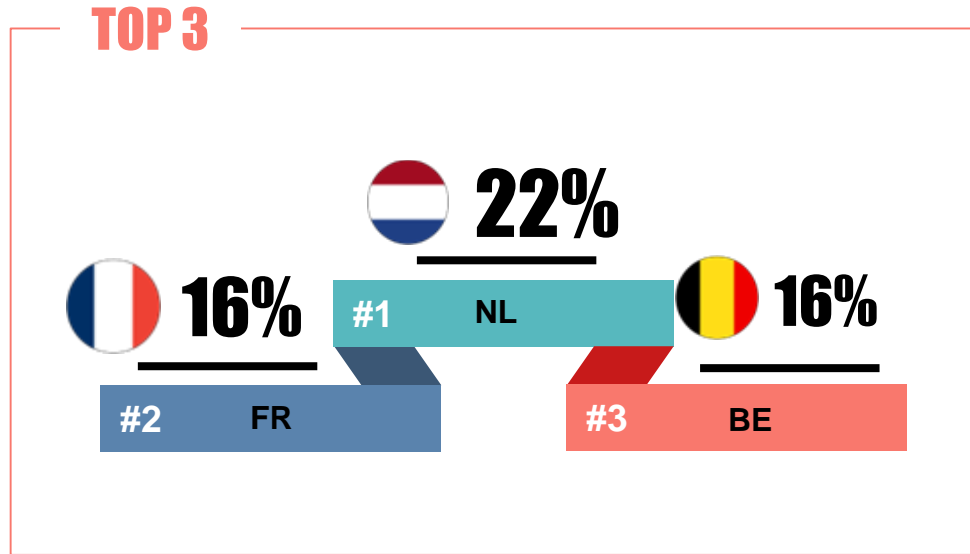
PROPORTION OF COMPANIES READY TO GIVE UP ALL OR PART OF THEIR COMPANY CARS FOR CAR SHARING

MM10 and MM10b. And would you give up all or part of your company cars for such alternatives?

Basis: companies with corporate vehicles = 100%



% YES



#4		CH	15%
#5		DE	13%
#6		UK	11%
#7		PL	6%
#8		LU	5%
#9		IT	3%
#10		ES	3%
#11		PT	1%
#12		CZ	-

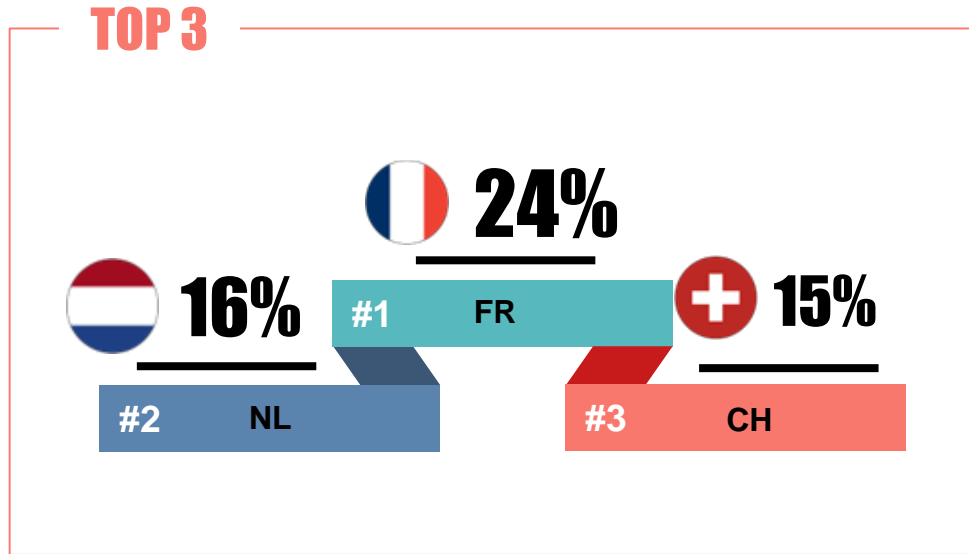
PROPORTION OF COMPANIES READY TO GIVE UP ALL OR PART OF THEIR COMPANY CARS FOR RIDE SHARING

MM10 and MM10b. And would you give up all or part of your company cars for such alternatives?

Basis: companies with corporate vehicles = 100%



% YES



#4		BE	14%
#5		DE	13%
#6		LU	10%
#7		UK	10%
#8		PL	4%
#9		ES	3%
#10		IT	2%
#11		PT	1%
#12		CZ	1%

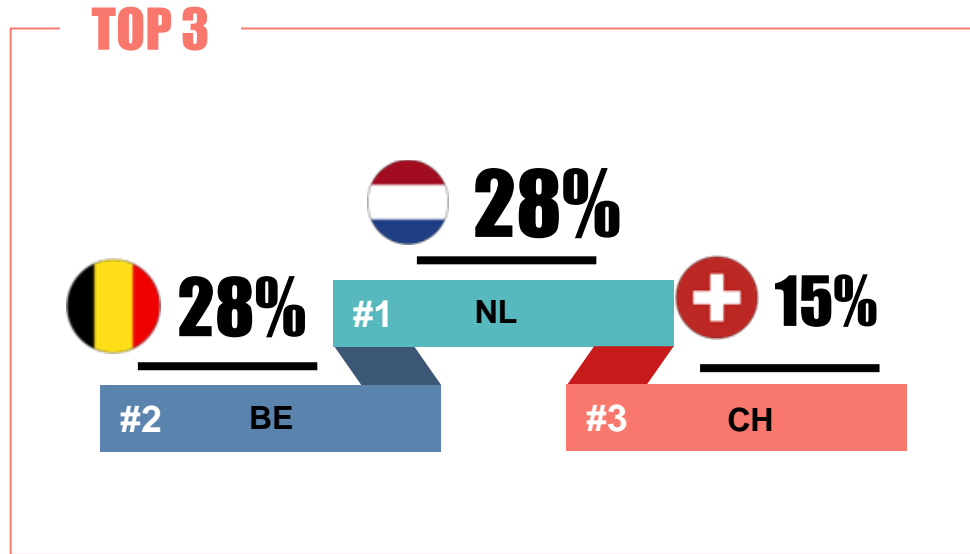
PROPORTION OF COMPANIES READY TO GIVE UP ALL OR PART OF THEIR COMPANY CARS FOR MOBILITY BUDGET

MM10 and MM10b. And would you give up all or part of your company cars for such alternatives?

Basis: companies with corporate vehicles = 100%



% YES



#4		FR	14%
#5		DE	11%
#6		UK	9%
#7		LU	9%
#8		ES	4%
#9		PL	4%
#10		IT	4%
#11		PT	-
#12		CZ	-

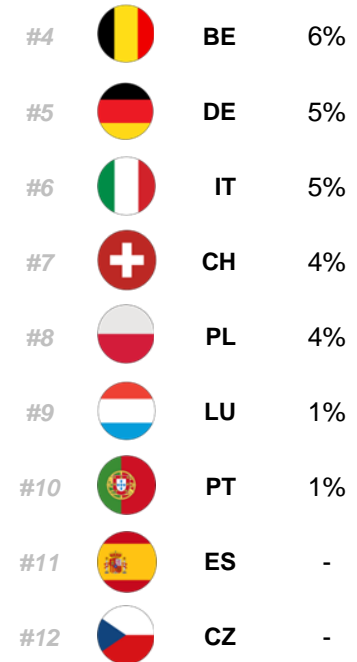
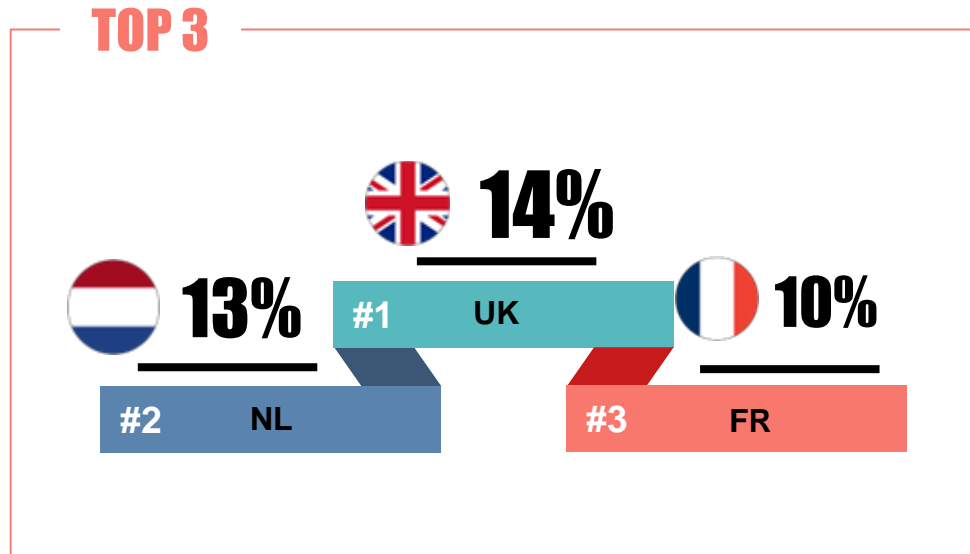
PROPORTION OF COMPANIES READY TO GIVE UP ALL OR PART OF THEIR COMPANY CARS FOR PRIVATE LEASE

MM10 and MM10b. And would you give up all or part of your company cars for such alternatives?

Basis: companies with corporate vehicles = 100%



% YES



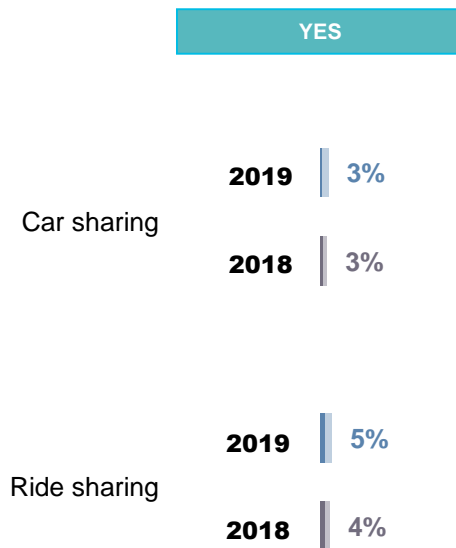
PROPORTION OF COMPANIES READY TO GIVE UP ALL OR PART OF THEIR COMPANY CARS FOR ALTERNATIVE MOBILITY SOLUTIONS

MM10 and MM10b. And would you give up all or part of your company cars for such alternatives?

Basis: companies with corporate vehicles = 100%



- Yes certainly
- Yes probably



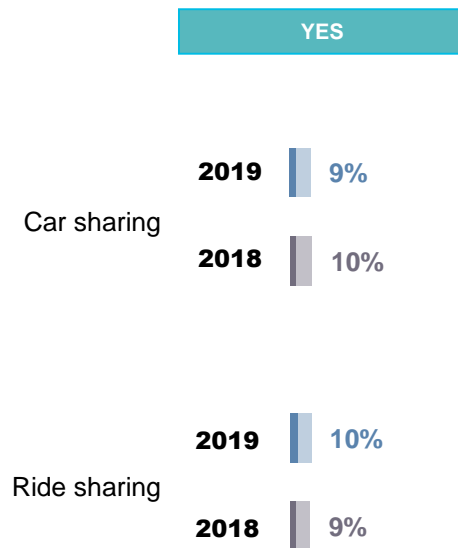
PROPORTION OF COMPANIES READY TO GIVE UP ALL OR PART OF THEIR COMPANY CARS FOR ALTERNATIVE MOBILITY SOLUTIONS

MM10 and MM10b. And would you give up all or part of your company cars for such alternatives?

Basis: companies with corporate vehicles = 100%



- Yes certainly
- Yes probably



An aerial, top-down view of a large crowd of people walking on a checkered floor. The people are seen from above, and their shadows are cast on the floor. The floor consists of large, dark and light squares in a grid pattern. The overall scene is dimly lit, with the people appearing as dark shapes against the lighter floor.

THANK YOU

The logo for Arval Mobility Observatory. It features the text 'Arval Mobility Observatory' in a green, sans-serif font. The text is centered between two horizontal green curved lines that resemble a stylized 'U' or a pair of wings. The entire logo is contained within a white rectangular box.

Arval Mobility
Observatory