



# 2019 FLEET BAROMETER

Belgium 



April 2019 / Survey n°1800954

# Table of content

<b>I</b>	<b>FLEET PROFILE</b>	<b>p.17</b>
<b>II</b>	<b>ENERGY MIX EXPECTED</b>	<b>p.35</b>
<b>III</b>	<b>FINANCING</b>	<b>p.53</b>
<b>IV</b>	<b>FLEET MANAGEMENT AND CONSULTING</b>	<b>p.66</b>
<b>V</b>	<b>TELEMATICS, DIGITAL TOOLS AND ROAD SAFETY</b>	<b>p.68</b>
<b>VI</b>	<b>ALTERNATIVES MOBILITIES</b>	<b>p.87</b>

# PERIMETER OF THE STUDY – FOCUS EUROPE



# METHODOLOGY



**DATA COLLECTION METHOD**

**CATI System**  
(Computer Assisted Telephone Interviewing)



**FIELDWORK PERIOD**



**TARGET**

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



**QUOTAS**

**Company size & sector**



**SAMPLE**

**3 930** interviews including **3 613** through Europe and **317** out of Europe



**DURATION OF INTERVIEW**

**10** minutes on average

# NUMBER OF INTERVIEWS CONDUCTED IN BELGIUM

Perimeter of the survey: companies owning at least 1 vehicle



Companies with less than 10 employees  
**100 interviews**



Companies with 10 to 99 employees  
**60 interviews**



Companies with 100 to 249 / 499 / 999 employees  
**80 interviews**



Companies with 250 / 500 / 1 000 employees and more  
**60 interviews**

**1 to 99  
employees  
160 interviews**

**100 employees  
and more  
140 interviews**

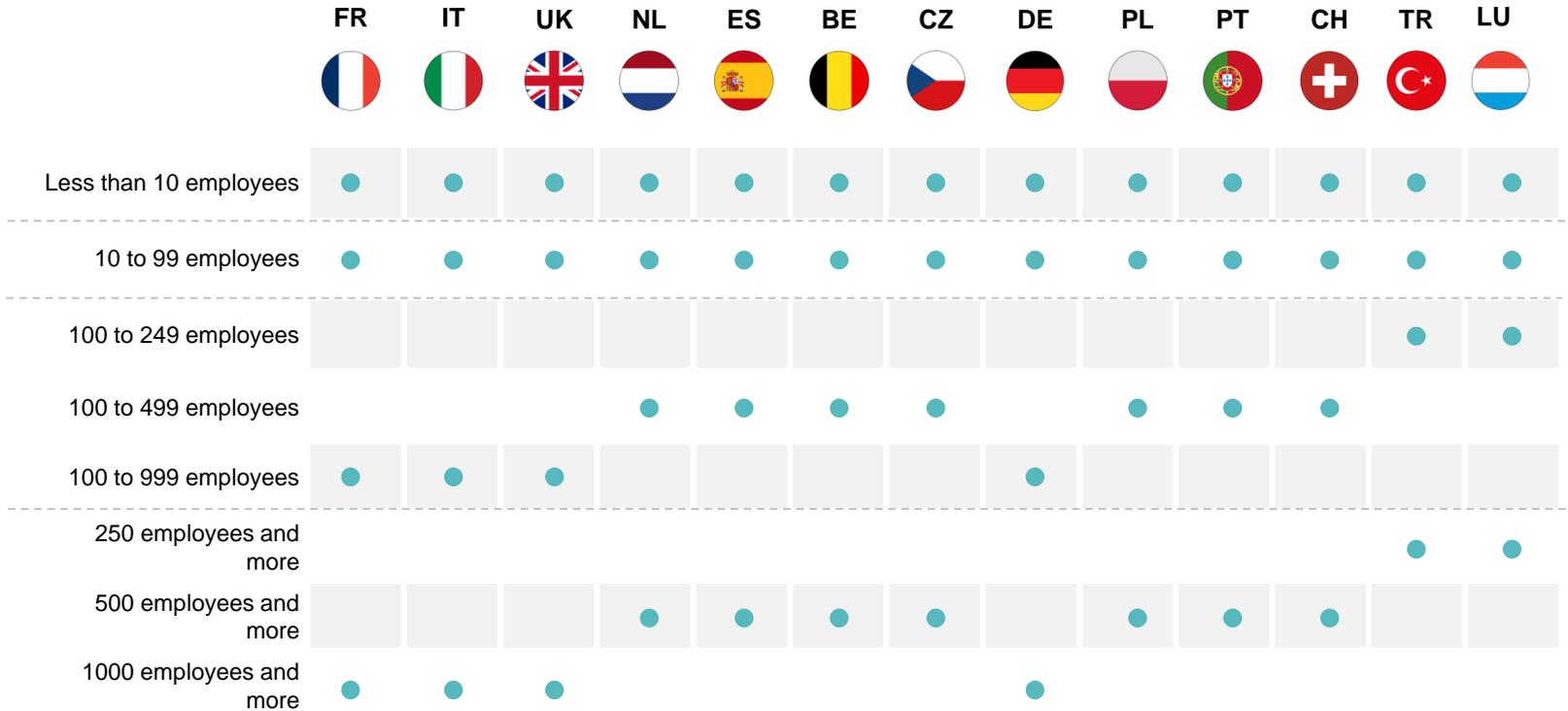
# SAMPLE STRUCTURE FOR BELGIUM

Company size & sector					Total
Construction	14 (14%)	8 (13%)	7 (9%)	5 (8%)	34 (11%)
Industry	14 (14%)	16 (27%)	30 (38%)	18 (30%)	78 (26%)
Services	37 (37%)	17 (28%)	27 (34%)	28 (47%)	109 (36%)
Trade	35 (35%)	19 (32%)	16 (20%)	9 (15%)	79 (26%)
<b>TOTAL</b>	<b>100 (100%)</b>	<b>60 (100%)</b>	<b>80 (100%)</b>	<b>60 (100%)</b>	<b>300 (100%)</b>
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 vehicles registered** by companies for each company size segment and activity sector as well as to **allow comparisons between countries on a similar bases**.*

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

# COMPANY SIZE SEGMENT DEFINITION



# PICTOGRAMS

## Company size



**Less than 10 employees**



**10 – 99 employees**



**100 to 249 / 499 / 999 employees**



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

# MAIN RESULTS

---

**#1**

**TAXATION AND THE RESULTS OF THE WLTP TESTS ARE VERY LARGELY CONSIDERED IN THE PURCHASING STRATEGY OF BELGIAN COMPANIES: ALMOST ALL THE LARGEST COMPANIES REPORT THAT WITHIN 3 YEARS, THE RESULTS OF THESE TESTS WILL HAVE AN IMPACT ON THEIR FLEET VEHICLE PURCHASING STRATEGY (CAR POLICY).**

**#2**

**FOLLOWING THE INTRODUCTION OF THE WLTP TEST, AN INCREASING NUMBER OF BELGIAN COMPANIES ARE CONSIDERING INTEGRATING ALTERNATIVE ENERGIES INTO THEIR FLEETS.**

**#3**

**THE MOBILITY BUDGET AND SOFT MOBILITY SOLUTIONS (SUCH AS BICYCLE): TWO ALTERNATIVE MOBILITY SOLUTIONS TO CARS OF PARTICULAR INTEREST TO THE BELGIAN COMPANIES.**

**#4**

**CONSULTING: A STRONG DEMAND FOR ADVICE FROM BELGIAN COMPANIES**

## #1

### TAXATION, THE RESULTS OF THE WLTP TESTS ARE VERY LARGELY CONSIDERED IN THE PURCHASING STRATEGY OF BELGIAN COMPANIES: ALMOST ALL THE LARGEST COMPANIES (93% OF COMPANIES WITH MORE THAN 500 EMPLOYEES) REPORT THAT WITHIN 3 YEARS, THE RESULTS OF THESE TESTS WILL HAVE AN IMPACT ON THEIR FLEET VEHICLE PURCHASING STRATEGY (CAR POLICY).

51% of Belgian companies have reported that they have implemented actions to reduce pollutant emissions from their company vehicle fleets, and this figure rises to 71% for companies with more than 500 employees. When actions of this type are implemented, companies logically start by limiting the rate of CO2 emissions.

It is therefore logical that the equipment strategies or car policies of Belgian companies already take into account the results of the new WLTP tests.

- **38% of Belgian companies** told us that they have **already taken into account the results of the WLTP tests** in their fleet vehicle purchasing strategy, i.e. **an increase of 4 points** compared to the measure carried out in 2018; this proportion rises **to 65% for the largest companies** (500 employees or more), i.e. **an increase of 23 points** compared to 2018
- And when we look ahead, **67% of Belgian companies** say that they will consider the results of the WLTP tests in the **next 3 years**, a proportion that reaches **93% of the largest companies** (500 workers and more), i.e. an increase of 10 points compared to the 2018 analysis.

In fact, **the structure of the Belgian fleets should develop rapidly**, and more rapidly than in other European countries, say Belgian fleet managers.

- 51% of them tell that they plan to adjust the level of vehicles made available for their employees following the introduction of the WLTP test against only 26% at the European level
- This proportion rises to 78% for the largest companies (more than 500 employees in Belgium) compared to 43% at European level

## #2

### FOLLOWING THE INTRODUCTION OF THE WLTP TEST, AN INCREASING NUMBER OF BELGIAN COMPANIES ARE CONSIDERING INTEGRATING ALTERNATIVE ENERGIES INTO THEIR FLEETS.

These intentions are converted into action. Today, 23% of Belgian companies have integrated electric, hybrid or plug-in hybrid vehicles into their fleets, which places Belgium in the 5th position among 13 countries studied.

Over the next 3 years, with taking into account the introduction of WLTP tests, this proportion should increase significantly to 55% for all Belgian companies and even 82% for companies with 500 or more employees.

This should allow Belgium to gain 2 places and reach 3rd place of the most virtuous countries in this field, just behind England and the Netherlands.

The mindset of the Belgian companies has changed considerably and the march towards a reduction in the share of diesel is well engaged. When we asked the companies what they would do if the car makers' offer changed and they offered diesel vehicles that were no more polluting than petrol vehicles, 48% of fleet managers said they would continue to reduce the share of diesel compared to only 2% who said they would revert to buying a larger proportion of diesel vehicles.

## #3 THE MOBILITY BUDGET AND SOFT MOBILITY SOLUTIONS (SUCH AS BICYCLE): TWO ALTERNATIVE MOBILITY SOLUTIONS TO CAR OF PARTICULAR INTEREST TO THE BELGIAN COMPANIES.

In addition to the alternative mobility solutions traditionally monitored in our barometer, that are **car sharing and ride sharing** (also called car-pooling in Belgium) and respectively used by **15% and 18%** of Belgian companies, they have proved to be particularly interested in the **mobility budget** and soft mobility solutions such as **cycling**.

- The **mobility budget** is already used by **11% of Belgian companies** (compared to 10% in Europe), but over the next 3 years, it will potentially be **used by 36% of companies**, a proportion that could reach, according to fleet managers, 73% for the largest companies. Beyond the interest, this solution could **most effectively reduce the size of fleets** according to the opinion of 35% of companies with more than 500 employees versus 13% for car sharing or ride sharing.
- Soft mobility solutions such as **cycling** are of great interest to Belgian companies. They are currently implemented across **25%** of companies and, over the next 3 years, **41% of companies** claim to have set it up or plan to set it up over this period. This proportion rises to **80%** for companies with **500 or more employees**.

## #4

### CONSULTING: A STRONG DEMAND FROM BELGIAN COMPANIES

The high utilisation rate of operating leasing makes it possible to provide Belgian companies with an important service offering associated to the vehicle delivered. In a fast-changing context (new insights into mobility within companies, cars as a component of salary/benefit, anti-pollution standards, etc.), Belgian companies are in need of advice: 49% of them expressed an interest in the possibility of receiving advice from external providers:

- Companies with **more than 100 employees** mainly want to be supported in the **transition to new energies, cost optimisation** and the **implementation of alternative mobility solutions**.
- **Smaller companies** (less than 10 employees) seek advice on **taxation**.
- **Medium-sized** companies (100 to 499 employees) are more interested in advice on cost **optimisation** and the choice of the most suitable **vehicle segments** for their activities

## PRINCIPAUX RÉSULTATS - BELGIQUE

**#1**

**FISCALITÉ ET LES RÉSULTATS DES TESTS WLTP TRÈS LARGEMENT PRIS EN COMPTE DANS LA STRATÉGIE D'ACHAT DES ENTREPRISES BELGES: LA QUASI-TOTALITÉ DES PLUS GRANDES ENTREPRISES DÉCLARENT QUE D'ICI 3 ANS, LES RÉSULTATS DE CES TESTS IMPACTERONT LEUR STRATÉGIE D'ACHAT DE VÉHICULES DE FLOTTES (CAR POLICY).**

**#2**

**SUITE À L'INTRODUCTION DU TEST WLTP, LES ENTREPRISES BELGES SONT DE PLUS EN PLUS NOMBREUSES À ENVISAGER D'INTÉGRER DES ÉNERGIES ALTERNATIVES AU SEIN DE LEURS FLOTTES.**

**#3**

**LE BUDGET MOBILITÉ ET LES SOLUTIONS DE MOBILITÉ DOUCE (COMME LE VÉLO) : DEUX SOLUTIONS DE MOBILITÉ ALTERNATIVE À LA VOITURE QUI INTÉRESSENT TOUT PARTICULIÈREMENT LES ENTREPRISES BELGES.**

**#4**

**LA CONSULTANCE : UNE FORTE DEMANDE DES ENTREPRISES BELGES**

### #1

**FISCALITÉ, LES RÉSULTATS DES TESTS WLTP TRÈS LARGEMENT PRIS EN COMPTE DANS LA STRATÉGIE D'ACHAT DES ENTREPRISES BELGES ; LA QUASI-TOTALITÉ DES PLUS GRANDES ENTREPRISES (93% DES ENTREPRISES DE PLUS DE 500 TRAVAILLEURS) DÉCLARENT QUE D'ICI 3 ANS, LES RÉSULTATS DE CES TESTS IMPACTERONT LEUR STRATÉGIE D'ACHAT DE VÉHICULES DE FLOTTES (CAR POLICY).**

51% des entreprises belges ont déclaré mettre en place des actions afin de réduire les émissions de polluants de au sein de leurs flottes de véhicules d'entreprise, ce chiffre monte même à 71% auprès des entreprises de plus de 500 travailleurs. Lorsque des actions de ce type sont mises en place, les entreprises commencent logiquement dans un premier temps par limiter le taux d'émission de CO2.

Il est donc logique que les stratégies d'équipement ou « car policies » des entreprises belges tiennent d'ores et déjà largement comptes des résultats des nouveaux tests WLTP.

- **38% des entreprises belges** nous ont déclaré **déjà tenir compte des résultats des tests WLTP** dans le cadre de leur stratégie d'achat de véhicules de flotte, soit une **progression de 4 points** par rapport à la mesure effectuée en 2018 ; cette proportion monte même à **65% auprès des entreprises les plus grandes** (500 travailleurs ou plus), soit une **progression de 23 points par rapport à 2018**,
- Et lorsque l'on se **projette dans les 3 années à venir**, c'est **67% des entreprises belges** qui déclarent qu'elles tiendront compte des résultats des tests WLTP, proportion qui atteint **93% des plus grandes entreprises** (500 travailleurs et plus), soit une progression de 10 points par rapport à la mesure de 2018.

Dans les faits, **la structure des flottes belges devrait évoluer rapidement**, et plus rapidement que dans les autres pays européens affirment les responsables de flotte belges.

- 51% d'entre eux nous disent qu'ils prévoient d'ajuster le niveau des véhicules proposés à leurs salariés suite à l'introduction du test WLTP versus seulement 26% au niveau européen
- Cette proportion montant même à 78% pour les entreprises de taille les plus grandes (plus de 500 travailleurs en Belgique) versus 43% au niveau européen.

Les responsables de flotte nous disent être prêts à « choisir différents modèles ou marques en fonction de leurs taux d'émission », « introduire dans leurs flottes de nouvelles énergies » et « choisir des modèles qui permettront de baisser la fiscalité ».

### #2

**SUITE À L'INTRODUCTION DU TEST WLTP, LES ENTREPRISES BELGES SONT DE PLUS EN PLUS NOMBREUSES À ENVISAGER D'INTÉGRER DES ÉNERGIES ALTERNATIVES AU SEIN DE LEURS FLOTTES.**

Ces intentions se traduisent dans les faits. Aujourd'hui, 23% des entreprises belges ont intégré au sein de leurs flottes des véhicules électriques, hybrides ou plug-in hybrides, ce qui place la Belgique au 5e rang des 13 pays étudiés.

A horizon de 3 ans, compte tenu de l'introduction des tests WLTP, cette proportion devrait très largement progresser pour atteindre 55% pour l'ensemble des entreprises belges et même 82% auprès des entreprises de 500 travailleurs ou plus. Cela devrait permettre à la Belgique de gagner 2 places pour atteindre la rang numéro 3 des pays les plus vertueux en la matière, juste derrière l'Angleterre et les Pays-Bas.

L'état d'esprit des entreprises belges a fortement évolué et la marche vers la baisse de la part du diesel est largement engagée. Lorsque l'on demande aux entreprises ce qu'elles feraient si l'offre des constructeurs venait à évoluer et qu'ils proposaient des véhicules diesels pas plus polluants que les véhicules essence, 48% des responsables de flotte affirment qu'ils continueraient réduire la part du diesel contre 2% seulement qui affirment qu'ils feraient machine arrière en achetant une part plus importante de véhicules diesel.

### #3

#### LE BUDGET MOBILITÉ ET LES SOLUTIONS DE MOBILITÉ DOUCE (COMME LE VÉLO) : DEUX SOLUTIONS DE MOBILITÉ ALTERNATIVE À LA VOITURE QUI INTÉRESSENT TOUT PARTICULIÈREMENT LES ENTREPRISES BELGES.

Au-delà des solutions de mobilité alternatives classiquement suivies dans notre baromètre que sont le **car sharing** et le **ride sharing** (aussi appelé car pooling en Belgique), respectivement utilisées par **15% et 18%** des entreprises belges, ces dernières se sont révélées particulièrement intéressées par le **budget mobilité** et des solutions de mobilité douce (soft mobility) comme le **vélo**.

Le **budget mobilité** est déjà utilisé par **11% des entreprises belges** (versus 10% en Europe), mais, à horizon 3 ans, c'est potentiellement **36% des entreprises qui l'utiliseront**, proportion qui pourrait atteindre, selon le déclaratif des responsables de flotte, **73% auprès des plus grandes entreprises**. Au-delà de l'intérêt, c'est la solution qui pourrait permettre de **réduire le plus efficacement la taille des flottes** selon l'avis de 35% des entreprises de plus de 500 travailleurs versus 13% pour le car sharing ou le ride sharing.

- Les solutions de mobilité douce (soft mobility) comme le **vélo** intéressent largement les entreprises belges. Aujourd'hui déployés dans **25%** d'entre elles, à horizon 3 ans c'est **41% des entreprises** qui déclarent l'avoir mis en place ou envisager de le mettre en place sur cette période. Cette proportion monte même à **80%** auprès des entreprises de **500 travailleurs et plus**.

### #4

#### LA CONSULTANCE : UNE FORTE

#### DEMANDE DES ENTREPRISES BELGES

Le taux d'utilisation élevé du leasing opérationnel permet déjà d'apporter aux entreprises belges un volet service important associé au véhicule fourni. Dans un contexte en pleine évolution (nouvelles visions de la mobilité en entreprise, voiture comme composante de la rémunération / avantage en nature, normes anti-pollution...), les entreprises belges sont en demande de conseils : 49% d'entre-elles se sont déclarées intéressées par la possibilité de recevoir des conseils de la part de prestataires externes :

- Les entreprises de **plus de 100 travailleurs** souhaitent principalement être accompagnées sur **la transition vers de nouvelles énergies, l'optimisation des coûts et la mise en place de solutions de mobilité alternative**.
- **Les plus petites entreprises** (moins de 10 travailleurs) recherchent des conseils concernant **la fiscalité**.
- Les entreprises de **taille moyenne** (100 à 499 travailleurs) sont plus intéressées par des conseils concernant l'**optimisation des coûts** ainsi que le choix des **segments de véhicules** les plus adaptés à leurs activités.

## VOORNAAMSTE RESULTATEN – BELGIË

**#1**

**FISCALITEIT EN RESULTATEN VAN WLTP-TESTS WEGEN DOOR BIJ DE AANKOOPSTRATEGIE VAN DE BELGISCHE ONDERNEMINGEN: VRIJWEL ALLE GROTE ONDERNEMINGEN VERKLAREN DAT DE RESULTATEN VAN DEZE EMISSIE-TESTS HUN AANKOOPSTRATEGIE VOOR VOERTUIGEN IN HET WAGENPARK (CAR POLICY) BINNEN DRIE JAAR ZULLEN BEÏNVLOEDEN.**

**#2**

**DOOR DE INVOERING VAN DE WLTP-TEST OVERWEGEN STEEDS MEER BELGISCHE ONDERNEMINGEN OM ALTERNATIEVE ENERGIE TE INTEGREREN IN HUN WAGENPARK.**

**#3**

**HET MOBILITEITSBUDGET EN DE ZACHTER MOBILITEITSOPLOSSINGEN (ZOALS DE FIETS): TWEE MOBILITEITSOPLOSSINGEN ALS ALTERNATIEF VOOR DE AUTO WAARIN DE BELGISCHE ONDERNEMINGEN BIJZONDER GEÏNTERESSEERD ZIJN.**

**#4**

**CONSULTANCY: EEN STERKE VRAAG NAAR ADVIES BIJ DE BELGISCHE ONDERNEMINGEN**

## #1

### FISCALITEIT EN RESULTATEN VAN WLTP-TESTS WEGEN DOOR BIJ DE AANKOOPSTRATEGIE VAN DE BELGISCHE ONDERNEMINGEN; VRIJWEL ALLE GROTE ONDERNEMINGEN (93% VAN DE ONDERNEMINGEN MET 500 OF MEER WERKNEMERS) VERKLAREN DAT DE RESULTATEN VAN DEZE EMISSIE-TESTS HUN AANKOOPSTRATEGIE VOOR VOERTUIGEN IN HET WAGENPARK (CAR POLICY) BINNEN DRIE JAAR ZULLEN BEÏNVLOEDEN.

51% van de Belgische ondernemingen verklaart maatregelen te nemen om de uitstoot van verontreinigende stoffen door hun wagenpark te verminderen. Dat cijfer loopt zelfs op tot 71% bij de ondernemingen met meer dan 500 werknemers. Wanneer dergelijke maatregelen worden genomen, starten de ondernemingen in eerste instantie logischerwijs met de verlaging van de CO<sub>2</sub>-uitstoot.

Het is dus logisch dat de 'car policies' van de Belgische ondernemingen vanaf nu in grote mate rekening houden met de resultaten van de nieuwe WLTP-tests.

- **38% van de Belgische ondernemingen** zegt ons nu al rekening te houden met de **resultaten van de WLTP-tests** bij hun strategie voor de aankoop van voertuigen voor hun wagenpark, dat is een **toename van 4 punten** in vergelijking met de meting die werd uitgevoerd in 2018; dat percentage stijgt zelfs tot **65% bij de grootste ondernemingen** (500 werknemers of meer), hetzij een **stijging van 23 punten ten opzichte van 2018**
- Wanneer we kijken **naar de komende drie jaar**, komen we aan **67% van de Belgische ondernemingen** die verklaren dat ze rekening zullen houden met de resultaten van de WLTP-tests, een percentage dat stijgt tot **93% bij de grootste ondernemingen** (500 werknemers en meer), hetzij een toename van 10 punten in vergelijking met de meting van 2018.

In de praktijk **zou de structuur van de Belgische wagenparken dus snel moeten evolueren**, en volgens de Belgische fleetmanagers veel sneller dan in de andere Europese landen.

- 51% van hen zegt ons dat ze het niveau van de voertuigen die ze aan hun werknemers aanbieden, zullen aanpassen als gevolg van de invoering van de WLTP-test, tegenover slechts 26% op Europees niveau

## #2

### DOOR DE INVOERING VAN DE WLTP-TEST OVERWEGEN STEEDS MEER BELGISCHE ONDERNEMINGEN OM ALTERNATIEVE ENERGIE TE INTEGREREN IN HUN WAGENPARK.

Dit voornemen vertaalt zich in de praktijk. Vandaag heeft 23% van de Belgische ondernemingen elektrische, hybride of plug-in hybride wagens opgenomen in hun wagenpark, waardoor België op de vijfde plaats komt in de lijst van de dertien bestudeerde landen.

- Bij de grootste ondernemingen (meer dan 500 werknemers in België) gaat het hierbij zelfs om 78% tegenover 43% op Europees niveau.

De fleetmanagers vertelden dat ze bereid zijn om 'andere modellen of merken te kiezen afhankelijk van hun CO<sub>2</sub>-uitstoot', om 'nieuwe energieën te integreren in hun wagenpark' en om 'te opteren voor modellen die een fiscale vermindering mogelijk maken'.

Binnen drie jaar zou dit percentage, rekening houdend met de invoering van de WLTP-tests, aanzienlijk moeten stijgen tot 55% voor het geheel van de Belgische ondernemingen en zelfs tot 82% voor de ondernemingen met 500 of meer werknemers. Daardoor zou België twee plaatsen kunnen opschuiven en de nummer 3 worden van de meest verdienstelijke landen op dit gebied, vlak na Engeland en Nederland.

De mentaliteit van de Belgische ondernemingen is sterk veranderd en het engagement om het dieselaandeel te doen krimpen is ontzettend groot. Wanneer we ondernemingen vragen wat ze zouden doen als het aanbod van de autofabrikanten zou evolueren en deze dieselwagens zouden aanbieden die minder vervuilend zijn dan de benzinewagens, verklaart 48% van de fleetmanagers dat ze het dieselaandeel zouden blijven afbouwen. Slechts 2% zou de klok terugdraaien en opnieuw meer dieselwagens kopen.

## #3

**HET MOBILITEITSBUDGET EN ZACHTE MOBILITEITSOPLOSSINGEN (ZOALS DE FIETS): TWEE MOBILITEITSOPLOSSINGEN ALS ALTERNATIEF VOOR DE AUTO WAARIN DE BELGISCHE ONDERNEMINGEN BIJZONDER GEÏNTERESSEERD ZIJN.**

Naast de alternatieve mobiliteitsoplossingen die traditioneel in onze barometer worden gevolgd, met name **car sharing** en **ride sharing** (in België ook carpooling genoemd), respectievelijk aangewend door **15% en 18%** van de Belgische ondernemingen, blijken deze laatste ook bijzonder geïnteresseerd in het **mobilitéitsbudget** en in zachte mobiliteitsoplossingen zoals **de fiets**.

- Het **mobilitéitsbudget** wordt al gebruikt door **11% van de Belgische ondernemingen** (tegenover 10% in Europa), maar binnen drie jaar kan het best zijn dat **36% van de ondernemingen voor deze oplossing kiest**, een percentage dat volgens de fleetmanagers zou kunnen oplopen tot **73% bij de grootste ondernemingen**. Afgezien van het belang ervan, is dit de oplossing die **de omvang van het wagenpark het meest doeltreffend zou kunnen verkleinen** volgens 35% van de ondernemingen met meer dan 500 werknemers, tegenover 13% voor car sharing of ride sharing.
- De Belgische ondernemingen zijn sterk geïnteresseerd in zachte mobiliteitsoplossingen (soft mobility) zoals de **fiets**. Vandaag gaat het om **25%** van die ondernemingen, maar over drie jaar zou **41% van de ondernemingen** deze oplossing hebben ingevoerd, of van plan te zijn ze in te voeren. Dit percentage stijgt zelfs tot **80%** bij de ondernemingen met **500 werknemers en meer**.

## #4

**CONSULTANCY: EEN STERKE VRAAG NAAR ADVIES BIJ DE BELGISCHE ONDERNEMINGEN**

Door het hoge gebruik van operationele lease wordt nu al een aanzienlijk deel 'service' bij het dienstenpakket van de voertuigen aangeboden aan de Belgische ondernemingen. In een context in volle ontwikkeling (nieuwe ideeën over de bedrijfsmobiliteit, de auto als deel van de verloning, als voordeel in natura, de antivervuilingnormen, ...) zijn de Belgische ondernemingen continu op zoek naar advies: 49% zegt geïnteresseerd te zijn in de mogelijkheid om advies te krijgen van externe dienstverleners:

- Ondernemingen met **meer dan 100 werknemers** willen voornamelijk begeleiding in verband met **de overgang naar nieuwe energieën, de optimalisatie van de kosten en de invoering van alternatieve mobiliteitsoplossingen**.
- **De kleinere ondernemingen** (minder dan 10 werknemers) hebben nood aan advies inzake **fiscaliteit**.
- De ondernemingen van **gemiddelde grootte** (100 tot 499 werknemers) zijn meer geïnteresseerd in tips om de **kosten te optimaliseren** en willen worden begeleid bij de keuze van de **voertuigsegmenten** die het best zijn aangepast aan hun activiteiten.



# FLEET PROFILE

---

I

# FLEET PROFILE

---

A

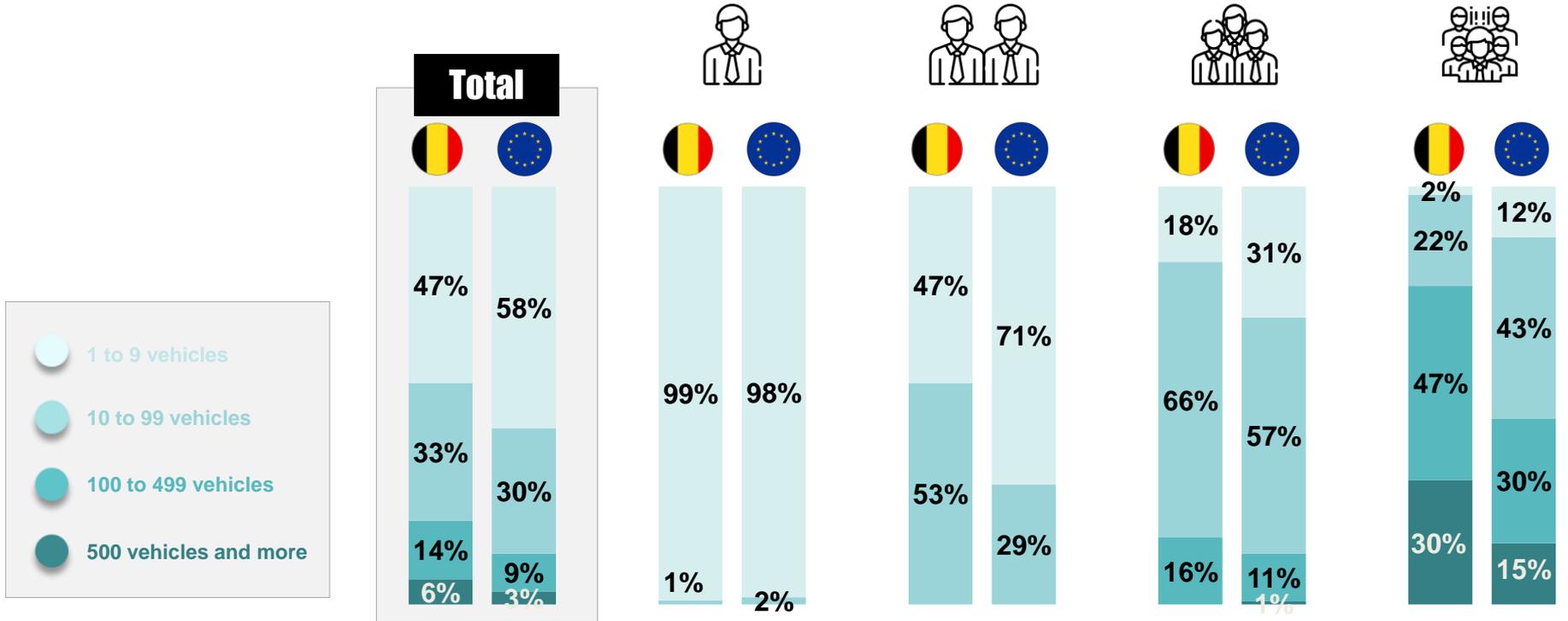
## FLEET CHARACTERISTICS

# NUMBER OF VEHICLES IN FLEET

(Passenger cars + LCVs)

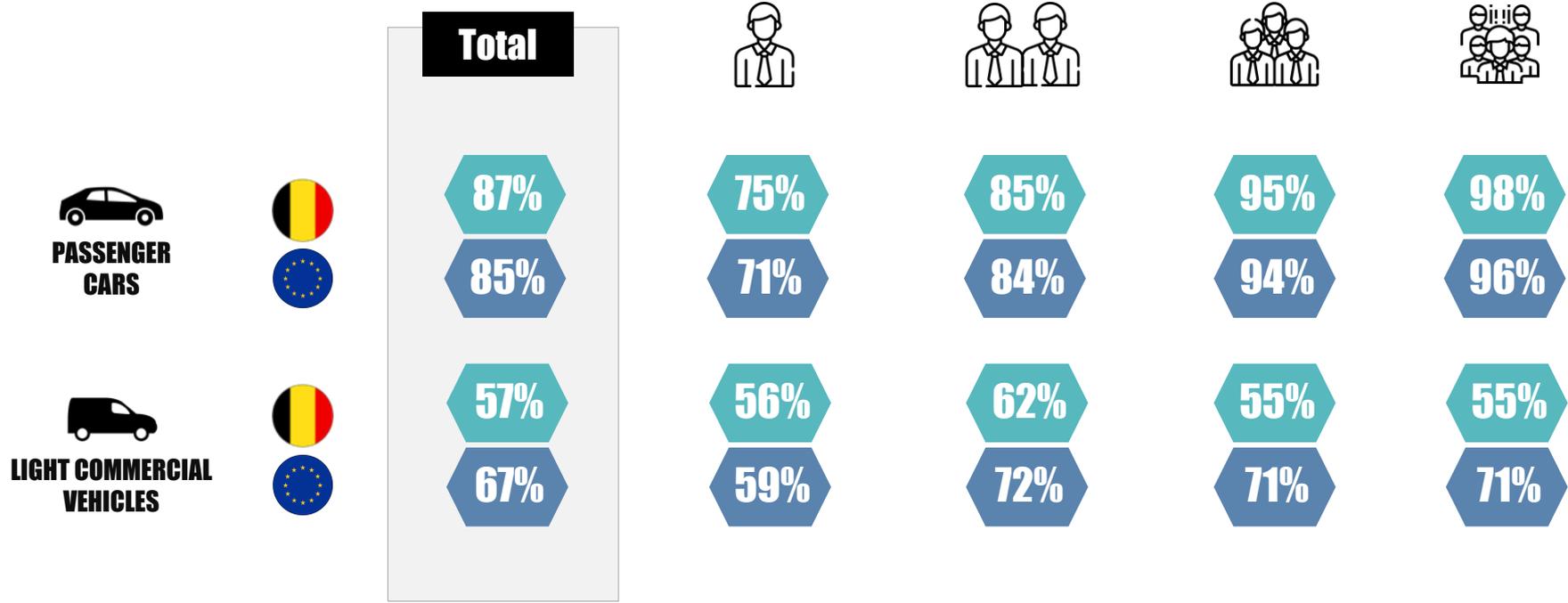
A5. Can you please tell me the total number of vehicles of less than 3.5 tons in your fleet?

Basis: companies with corporate vehicles = 100%



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

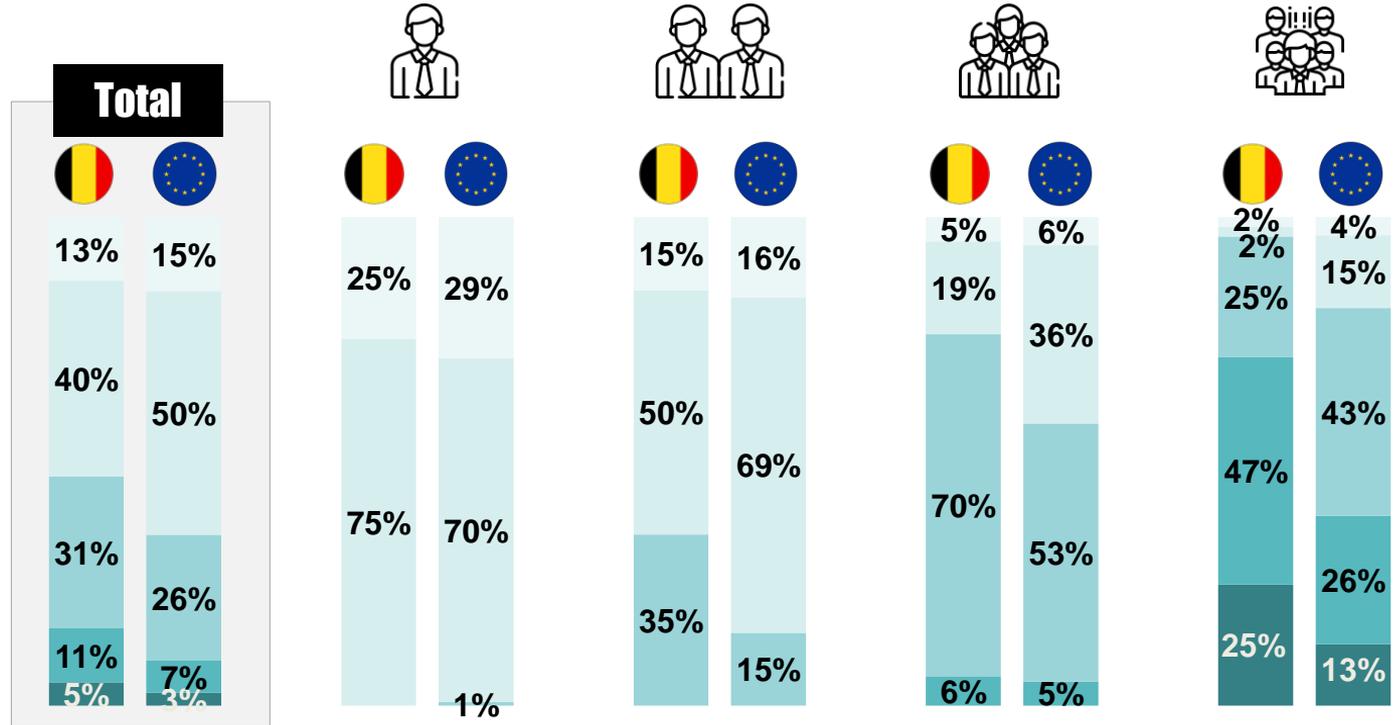




# NUMBER OF PASSENGER CARS IN FLEET

A5f\_1. And can you please tell me the total number of cars in your fleet?

Basis: companies with corporate vehicles = 100%

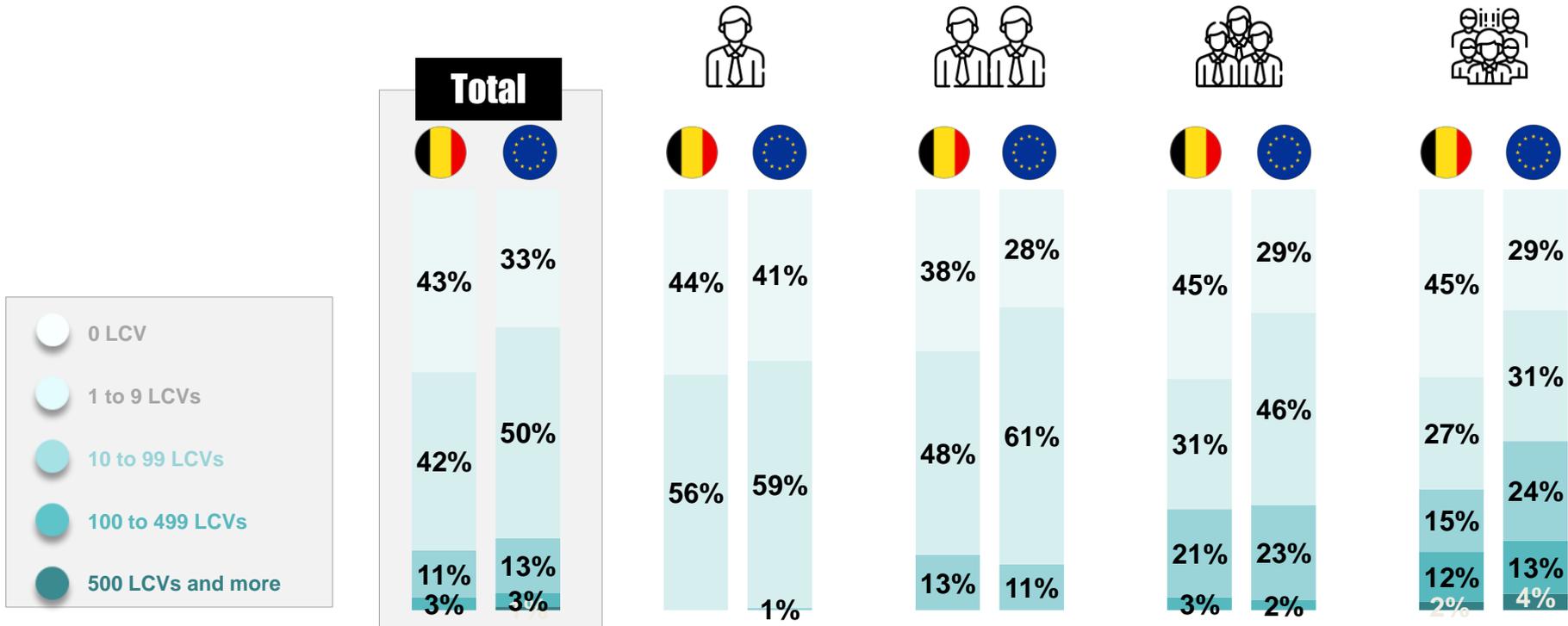




# NUMBER OF LCVS IN FLEET

A5f\_2. And can you please tell me the total number of LCVs or Vans in your fleet?

Basis: companies with corporate vehicles = 100%

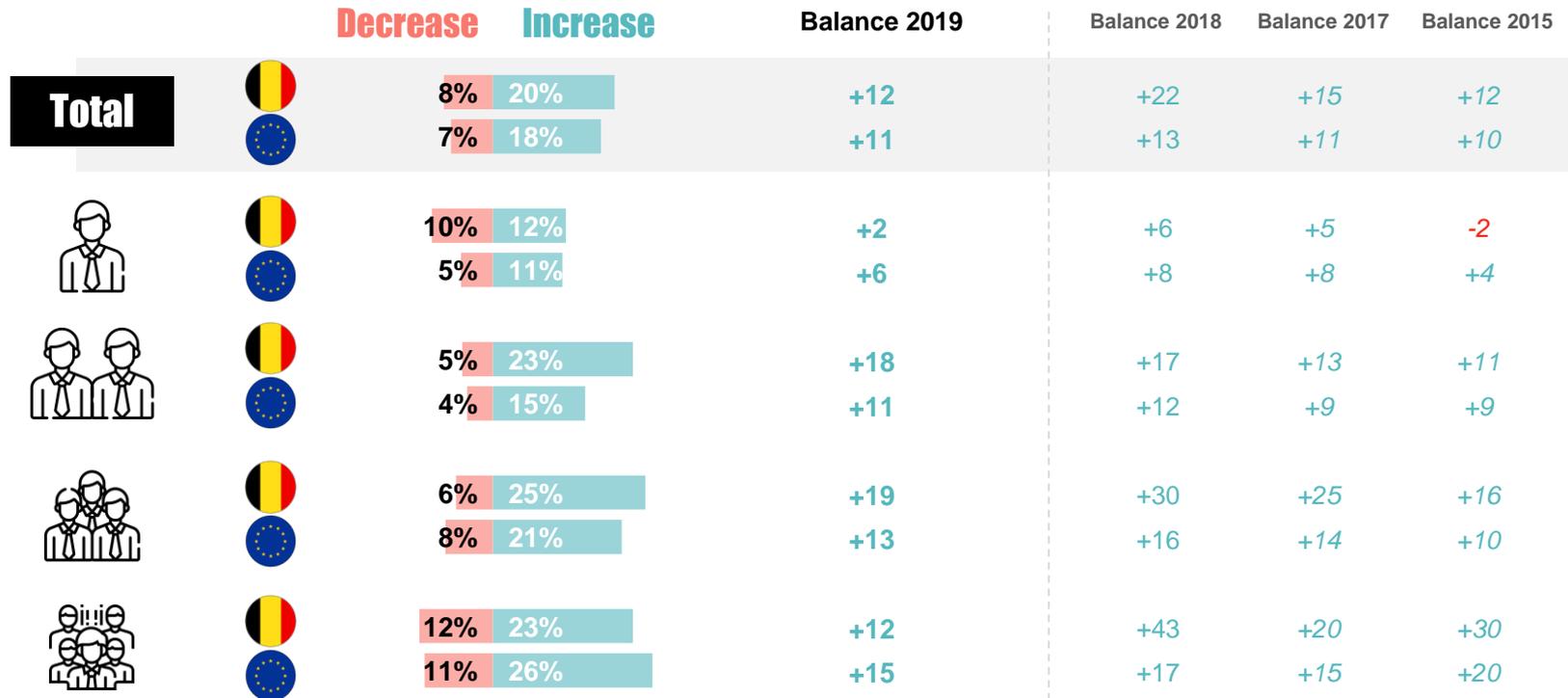


# FLEET GROWTH POTENTIAL

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

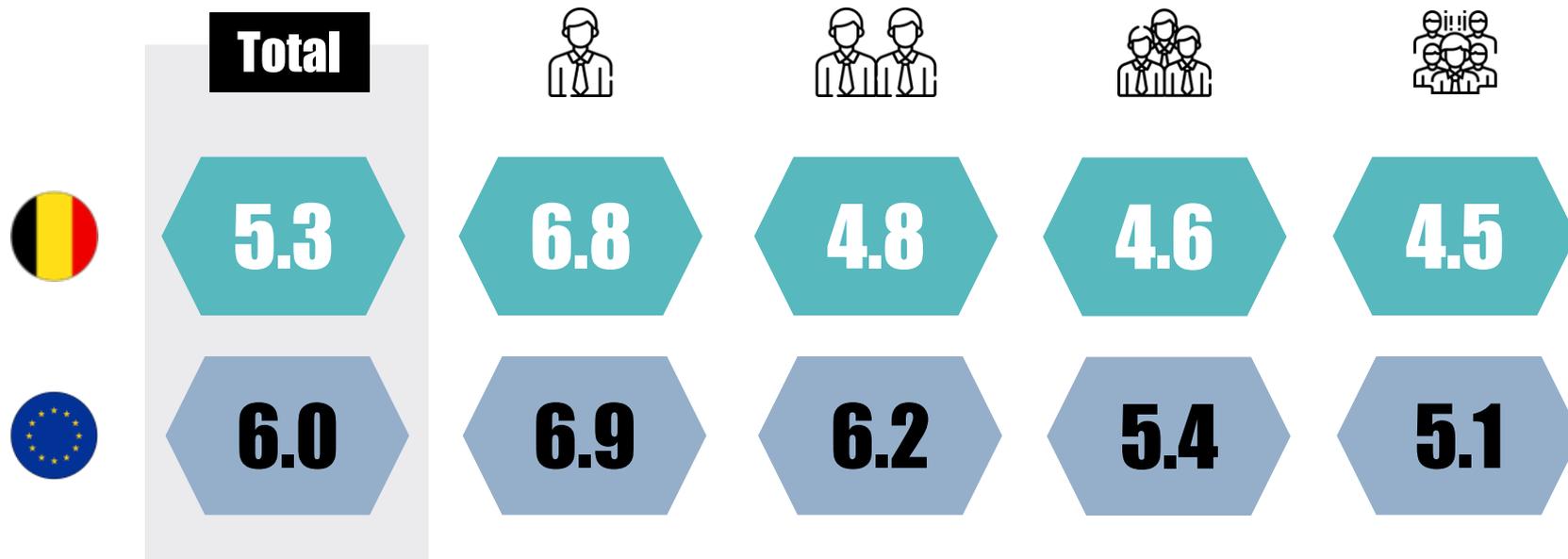
# HOW LONG DO COMPANIES KEEP THEIR VEHICLES?

(Passenger cars + LCVs)

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



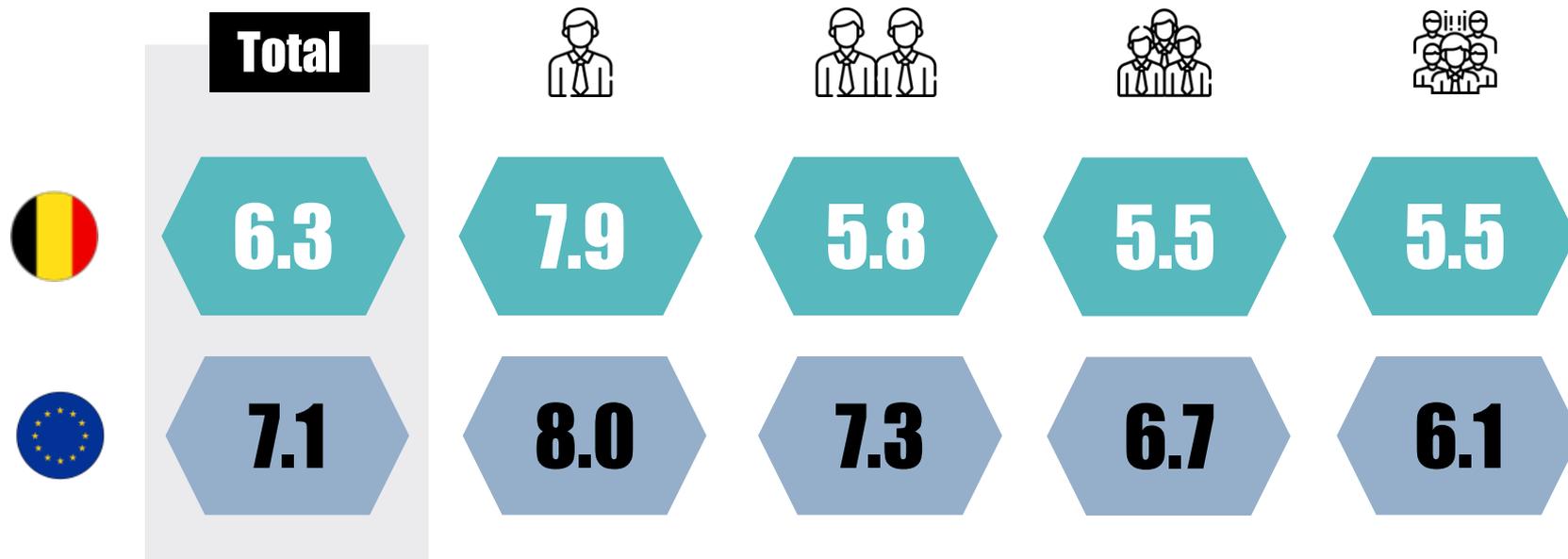


# HOW LONG DO COMPANIES KEEP THEIR LCVS?

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



# FLEET PROFILE – CHARACTERISTICS OF THE FLEET



PROPORTION OF COMPANIES HAVING AT LEAST A PASSENGER CAR AMONG COMPANIES WITH FLEET



75%



85%



95%



98%



71%

84%

94%

96%



PROPORTION OF COMPANIES HAVING AT LEAST A LCV AMONG COMPANIES WITH FLEET



56%



62%



55%



55%



59%

72%

71%

71%

# FLEET PROFILE – CHARACTERISTICS OF THE FLEET

## FLEET GROWTH POTENTIAL BALANCE

 **+12**

*(Balance = % which think that the total number of vehicles of their company fleet will increase – decrease)*



**+2**



**+6**



**+18**

**+11**



**+19**

**+13**



**+12**

**+15**

## HOW LONG THE COMPANY KEEPS ITS VEHICLES



**5.3**

**6.0**



**6.8**

**6.9**



**4.8**

**6.2**



**4.6**

**5.4**



**4.5**

**5.1**

## HOW LONG THE COMPANY KEEPS ITS LCVS



**6.3**

**7.1**



**7.9**

**8.0**



**5.8**

**7.3**



**5.5**

**6.7**



**5.5**

**6.1**

I

# FLEET PROFILE

---

B

## CURRENT ENERGIES

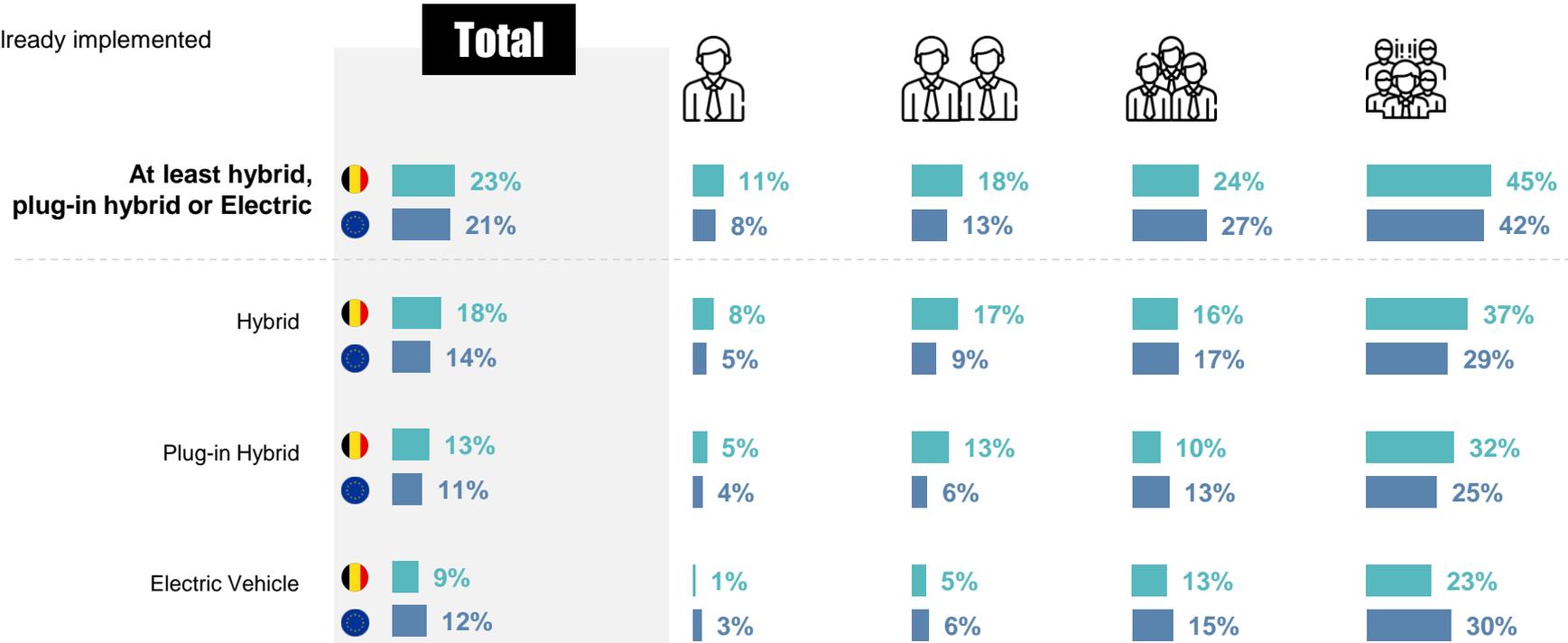
# CURRENT USE OF ELECTRIC AND HYBRID TECHNOLOGIES

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 implemented new energies or technologies in their fleet

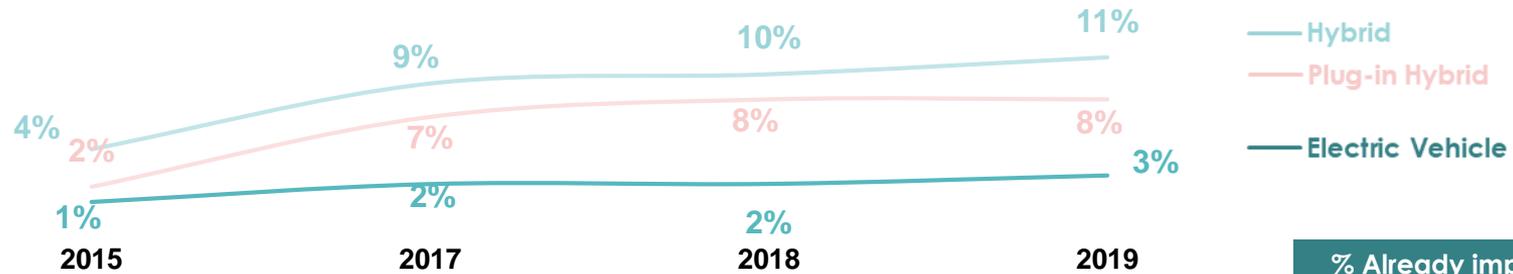
Legend: Already implemented



# CURRENT USE OF ELECTRIC AND HYBRID TECHNOLOGIES

E28. Amongst the following technologies, which one do you consider to use? 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 implemented new energies or technologies in their fleet



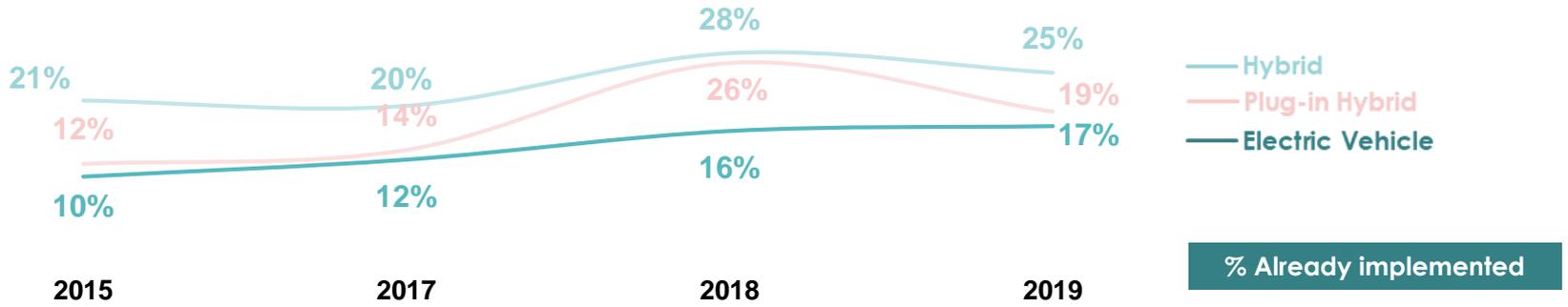
% Already implemented

# CURRENT USE OF ELECTRIC AND HYBRID TECHNOLOGIES

E28. Amongst the following technologies, which one do you consider to use? 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 implemented new energies or technologies in their fleet



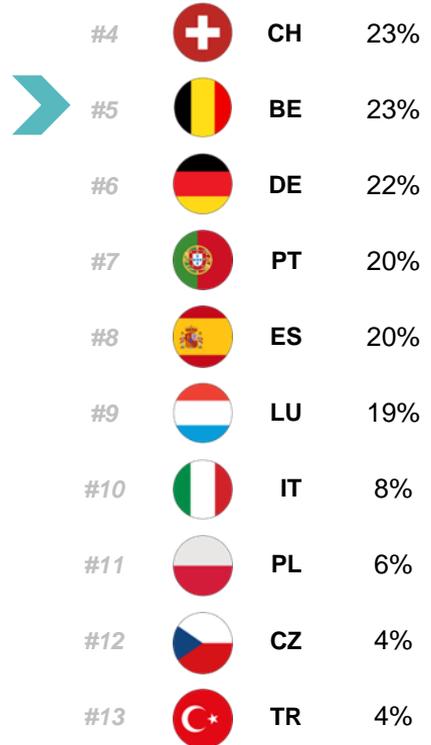
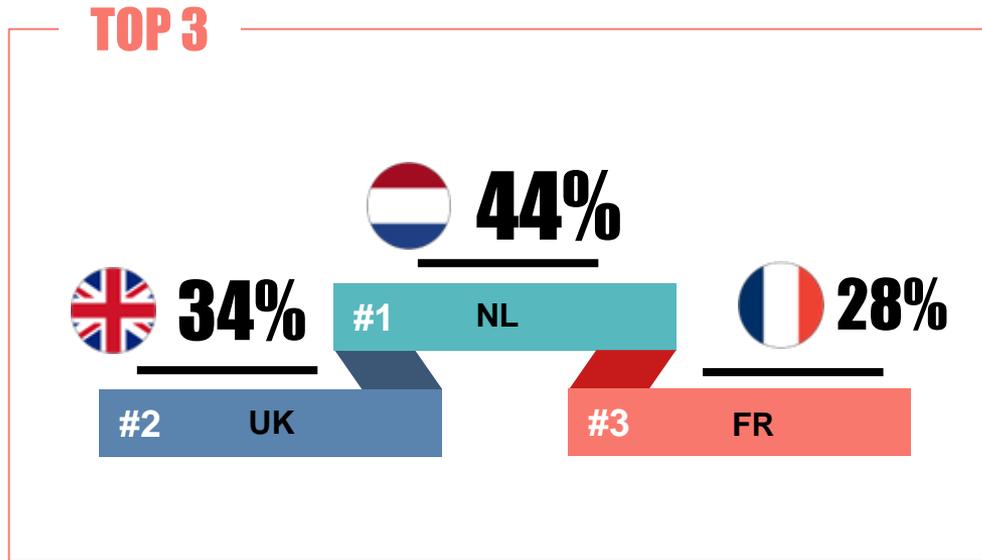
# CURRENT USE OF ELECTRIC AND HYBRID TECHNOLOGIES

## AT LEAST ELECTRIC - HYBRID OR PLUG-IN HYBRID

E28. Amongst the following technologies, which one do you consider to use? 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 implemented new energies or technologies in their fleet (hybrid, plug-in hybrid or electric vehicle)

% Already implemented

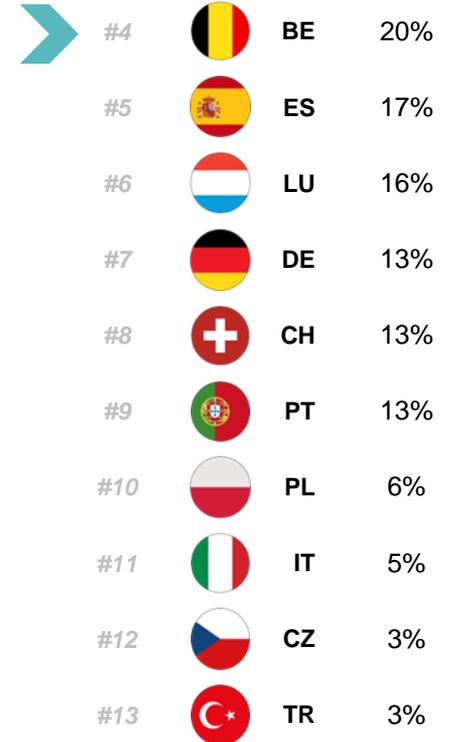
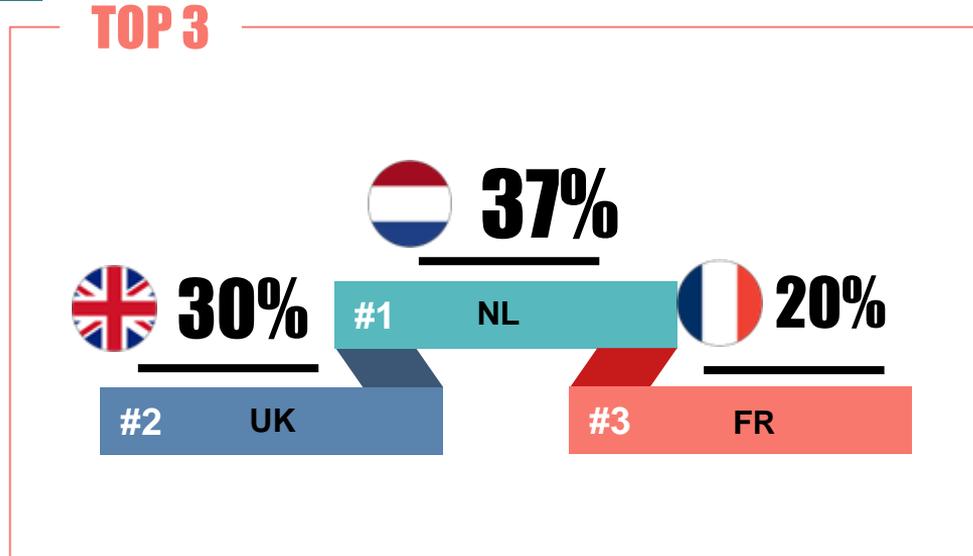


# CURRENT USE OF HYBRID AND PLUG-IN HYBRID TECHNOLOGIES

E28. Amongst the following technologies, which one do you consider to use? 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 hybrid and plug-in hybrid technology

% Already implemented

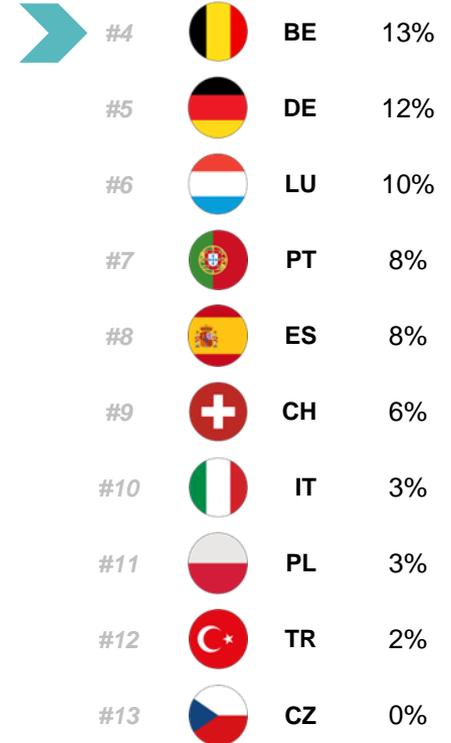
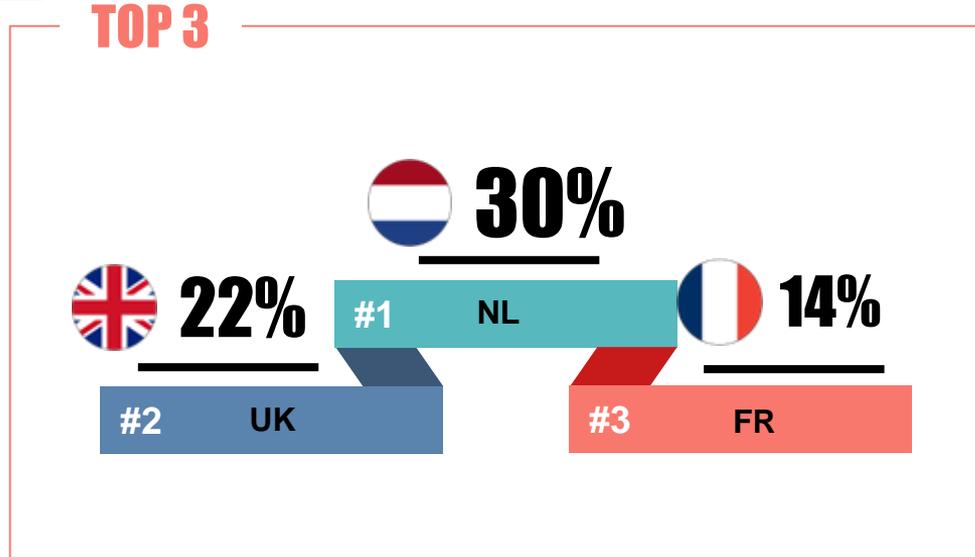


# CURRENT USE OF PLUG-IN HYBRID TECHNOLOGIES

E28. Amongst the following technologies, which one do you consider to use? 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 implemented plug-in hybrid technology

% Already implemented





II

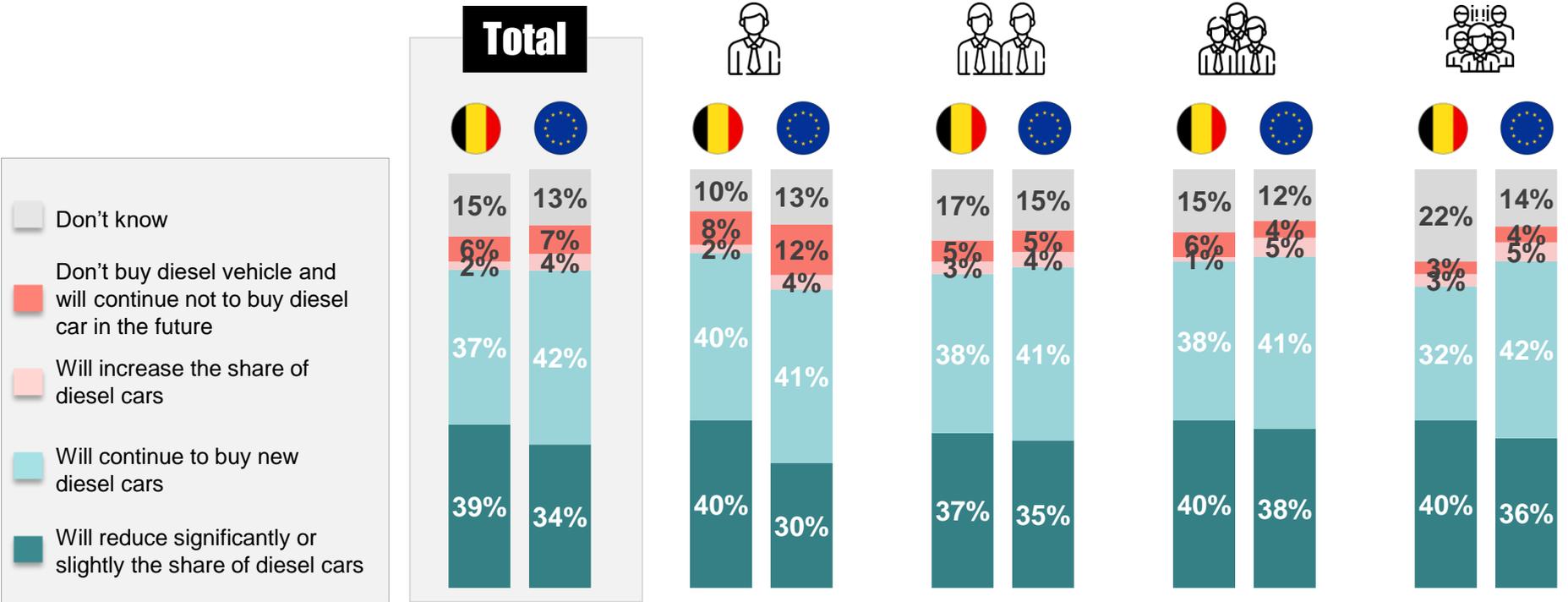
# ENERGY MIX EXPECTED

---

# 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%

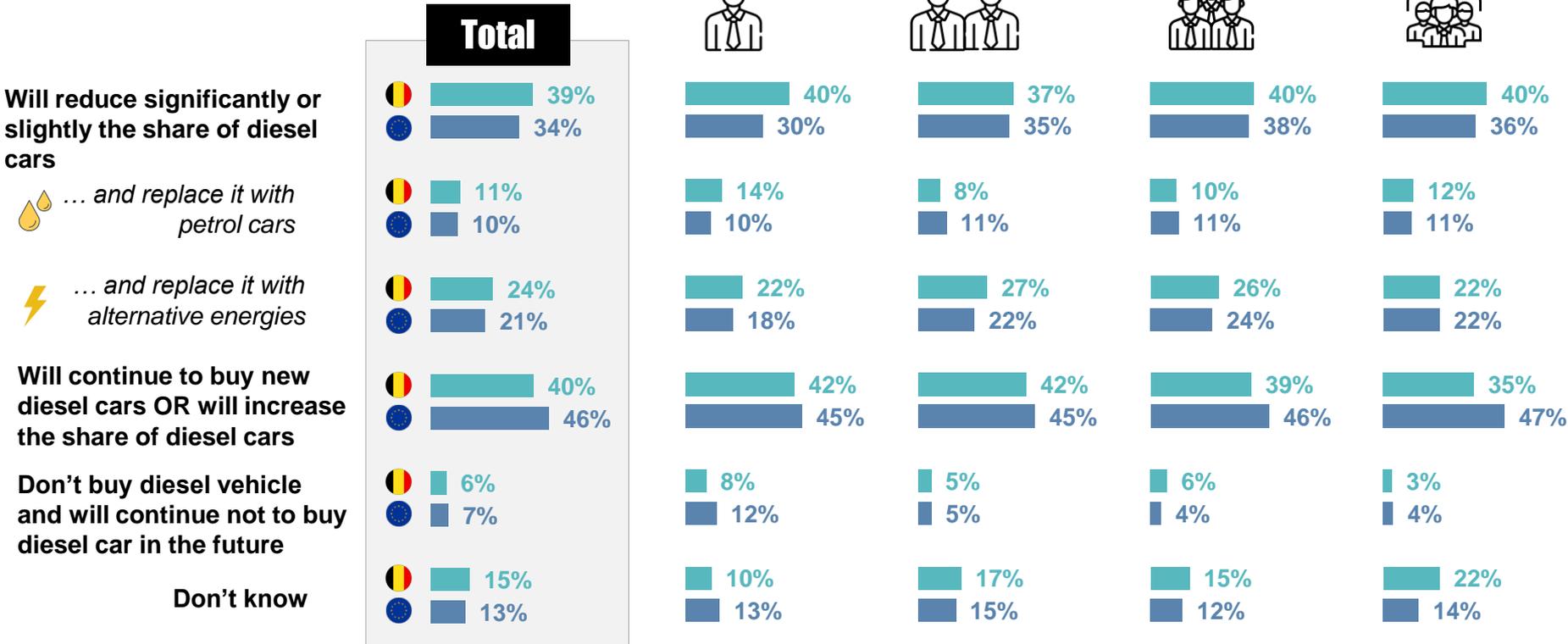


# DIESEL PURCHASE BEHAVIOUR IN CASE OF EQUIVALENT LEVELS OF EMISSIONS BETWEEN DIESEL AND PETROL CARS

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%

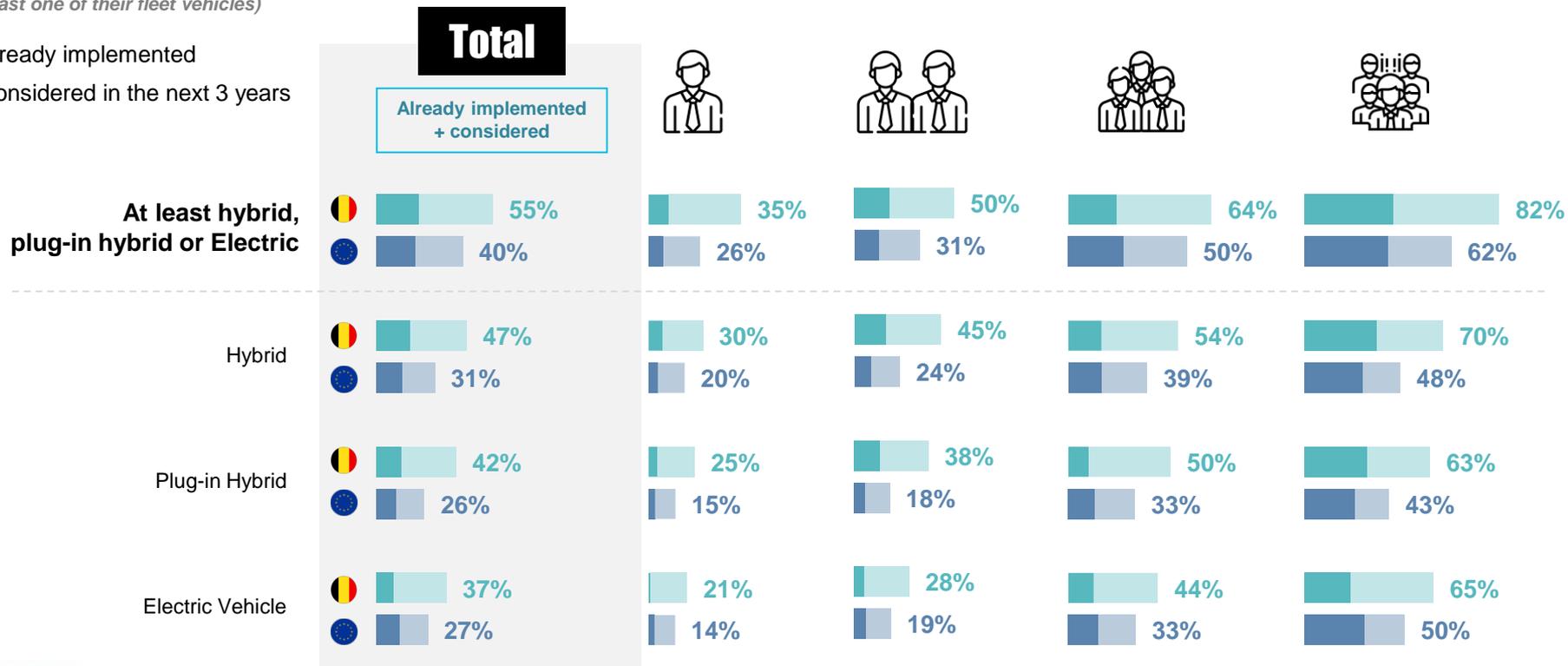


# POTENTIAL DEVELOPMENT OF ELECTRIC AND HYBRID ENERGIES

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)

  Already implemented  
  Considered in the next 3 years

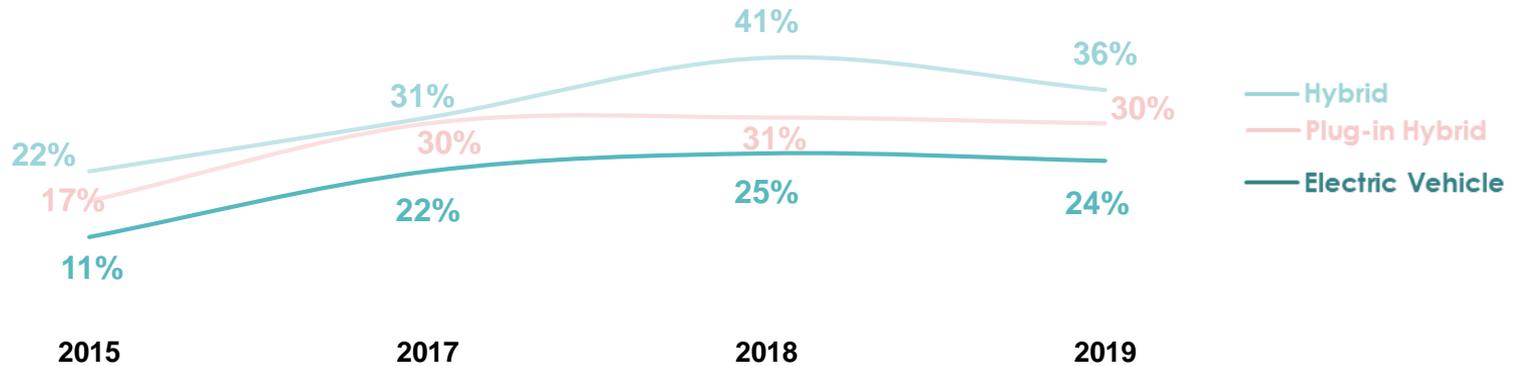


# POTENTIAL DEVELOPMENT OF HYBRID AND ELECTRIC ENERGIES

E28. Amongst the following technologies, which one do you consider to use? 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



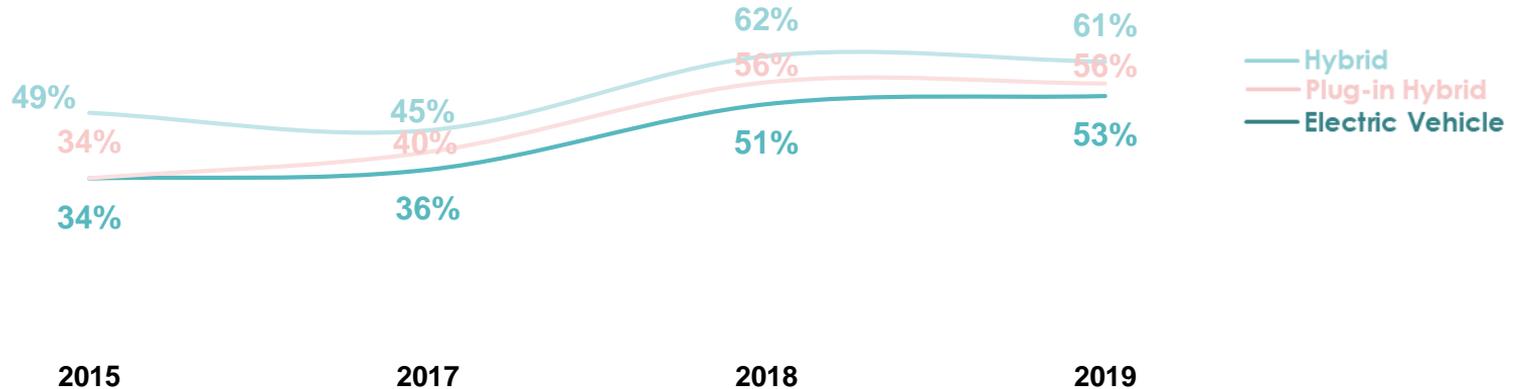
# POTENTIAL DEVELOPMENT OF HYBRID AND ELECTRIC ENERGIES

E28. Amongst the following technologies, which one do you consider to use? 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**



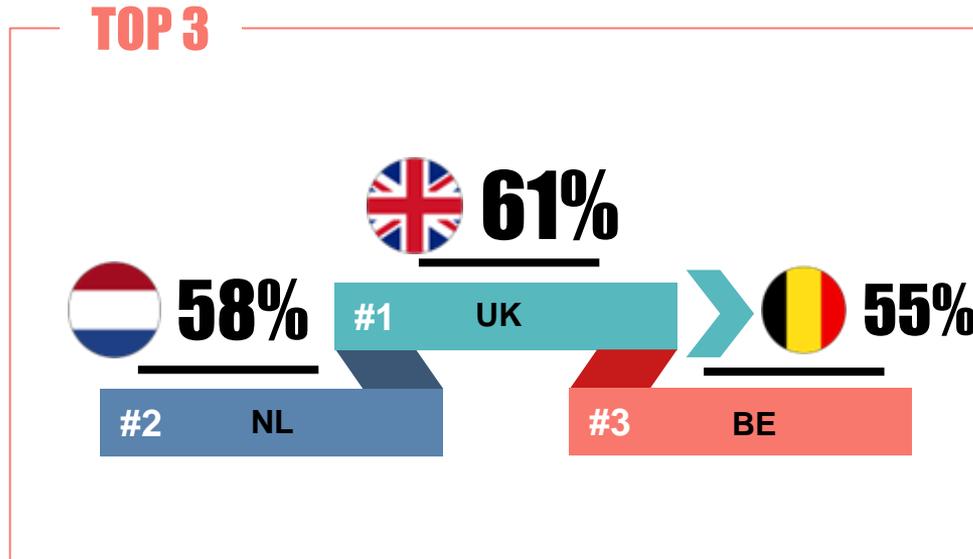
# POTENTIAL DEVELOPMENT OF ELECTRIC AND HYBRID ENERGIES

## AT LEAST ELECTRIC - HYBRID OR PLUG-IN HYBRID

E28. Amongst the following technologies, which one do you consider to use? 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



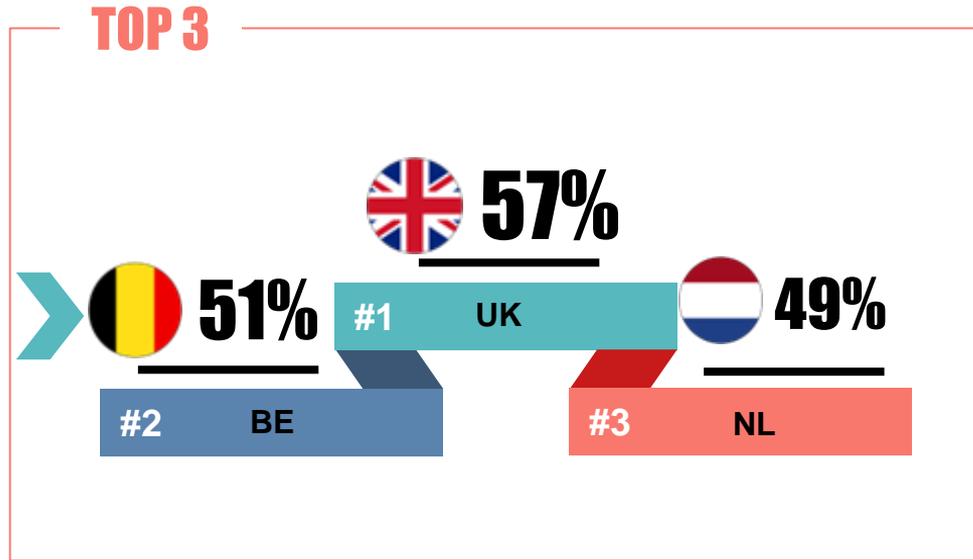
#4		FR	51%
#5		DE	47%
#6		CH	45%
#7		PT	43%
#8		ES	41%
#9		LU	31%
#10		TR	25%
#11		IT	23%
#12		PL	19%
#13		CZ	10%

# POTENTIAL DEVELOPMENT OF HYBRID AND PLUG-IN HYBRID

E28. Amongst the following technologies, which one do you consider to use? 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

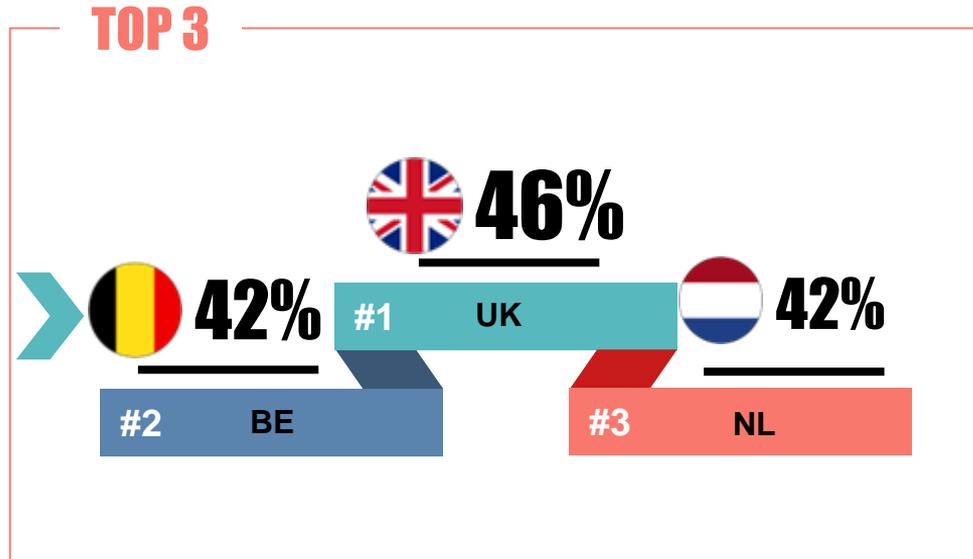


# POTENTIAL DEVELOPMENT OF PLUG-IN HYBRID

E28. Amongst the following technologies, which one do you consider to use? 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



#4	 DE	31%
#5	 FR	29%
#6	 PT	27%
#7	 ES	25%
#8	 LU	20%
#9	 CH	19%
#10	 TR	15%
#11	 PL	11%
#12	 IT	10%
#13	 CZ	3%

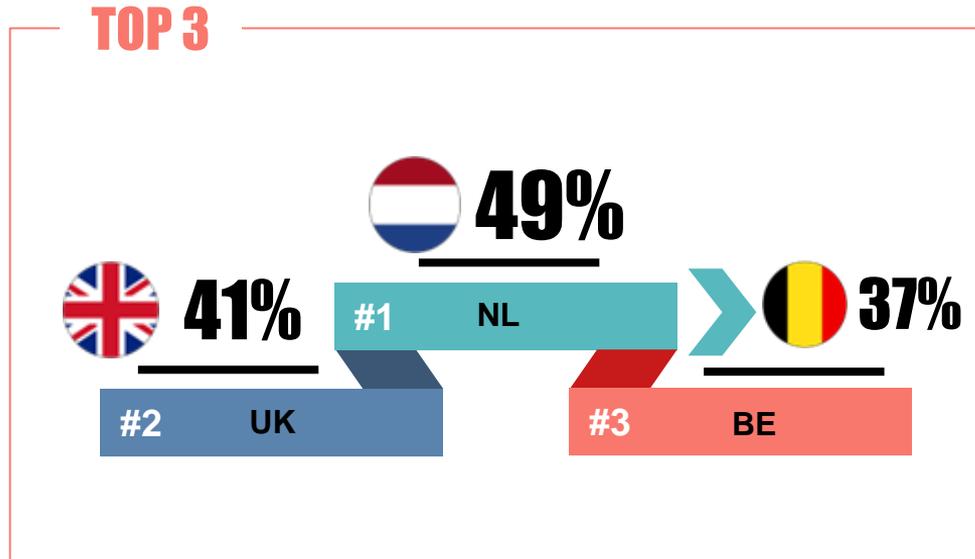
# POTENTIAL DEVELOPMENT OF ELECTRIC VEHICLE

## FULL ELECTRIC

E28. Amongst the following technologies, which one do you consider to use? 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



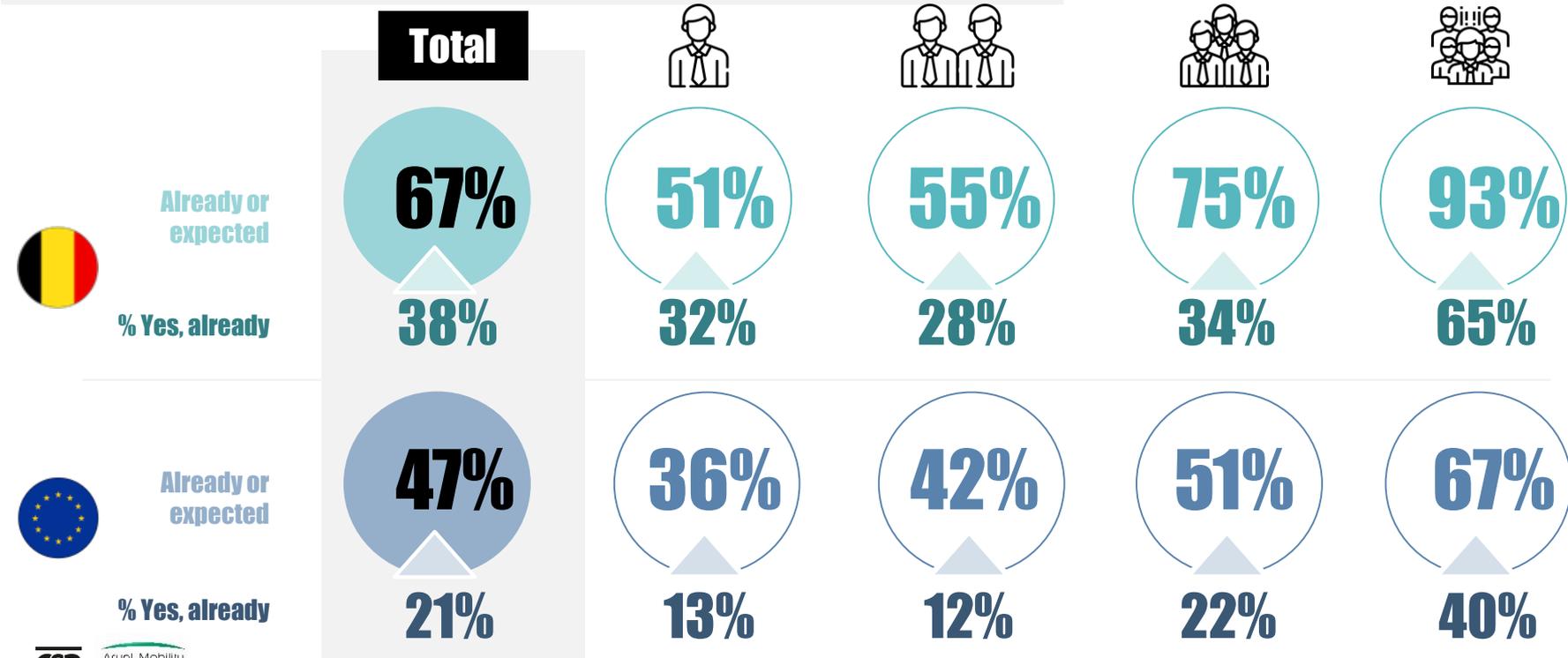
#4		DE	35%
#5		FR	34%
#6		CH	32%
#7		ES	28%
#8		PT	27%
#9		LU	19%
#10		TR	16%
#11		IT	13%
#12		PL	8%
#13		CZ	7%

# 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? Yes, it already has an impact on the company car fleet policy / Not yet, but an impact is expected in the next 3 years / No impact is expected / Don't know

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



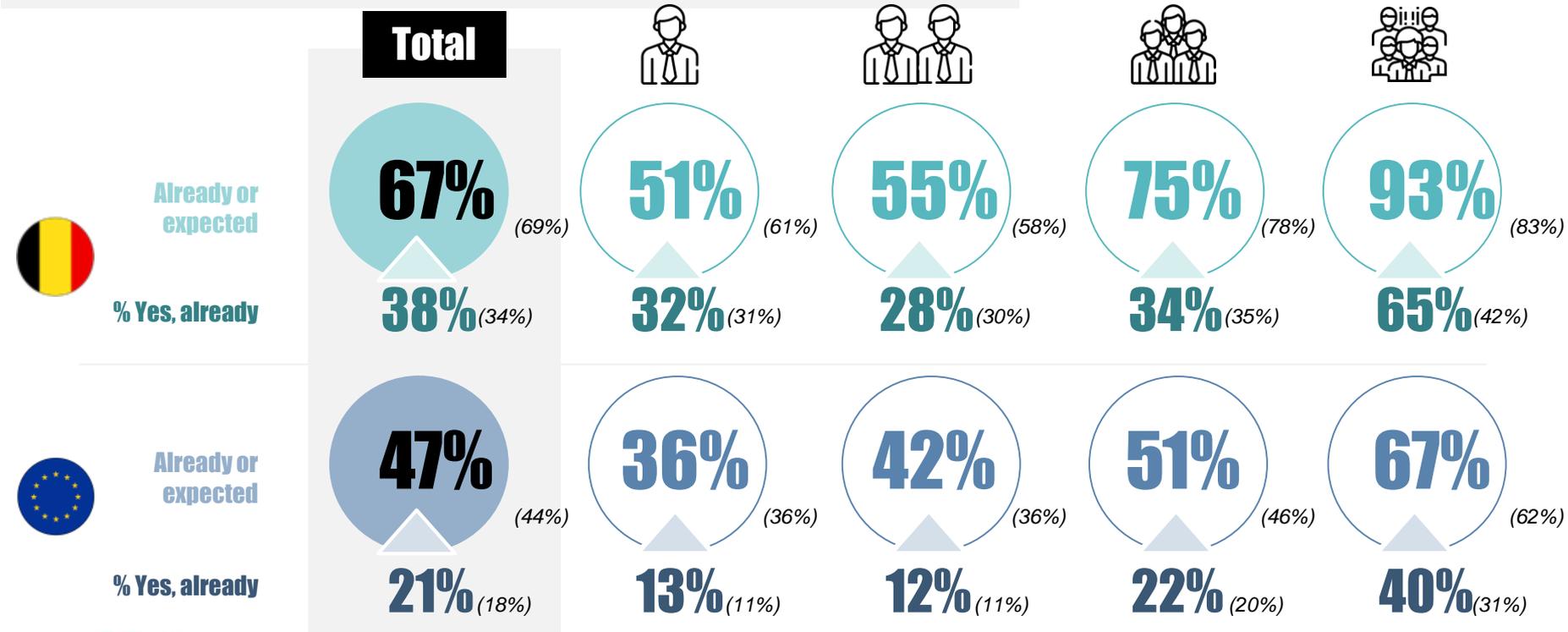
# IMPACT OF THE WLTP TEST INTRODUCTION

## (2019 versus 2018)

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

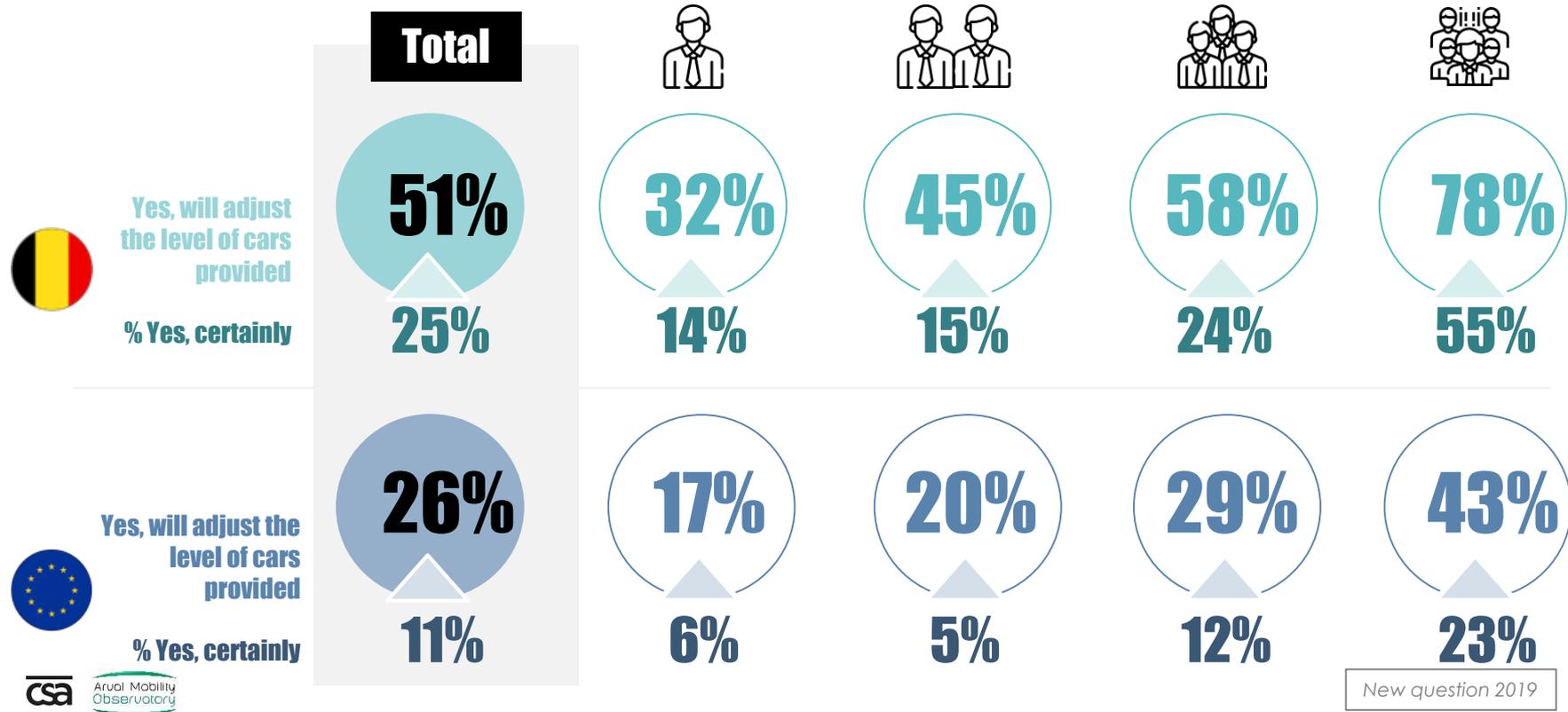


# IMPACT OF THE WLTP TEST INTRODUCTION

## 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%

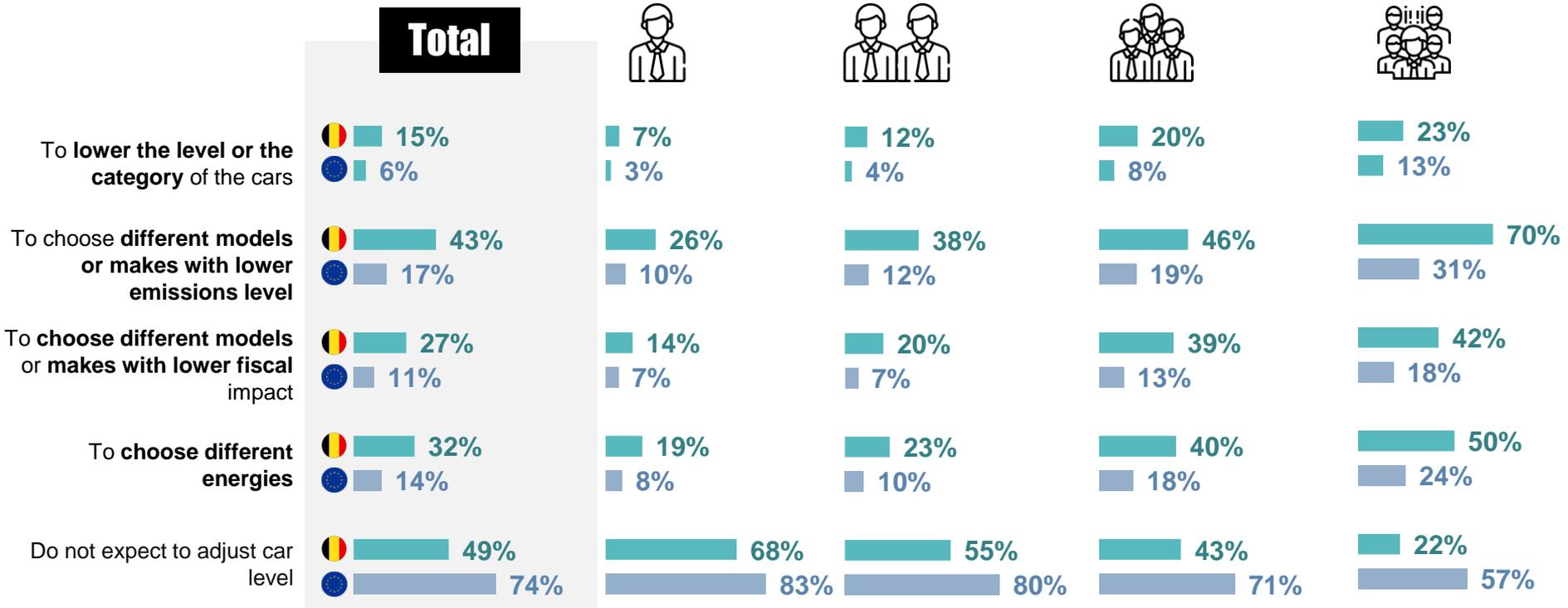
Proportion of companies expecting to adjust the level of cars to compensate the impact of the WLTP test



# IMPACT OF THE WLTP TEST INTRODUCTION

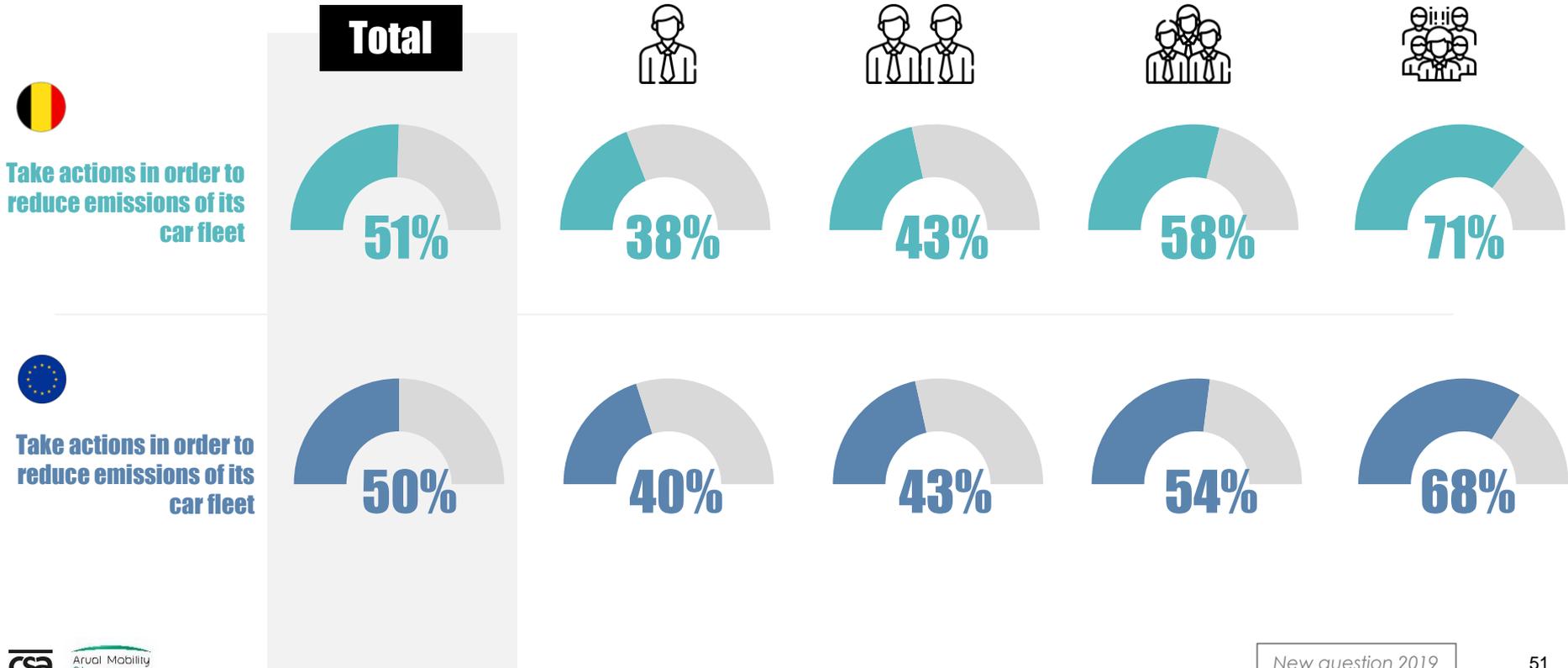
## COMPENSATIONS EXPECTING BY COMPANIES DUE TO WLTP TEST

NL17c. What kinds of compensations are you likely to implement?  
 Basis: companies with corporate vehicles = 100%



# PROPORTION OF 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"

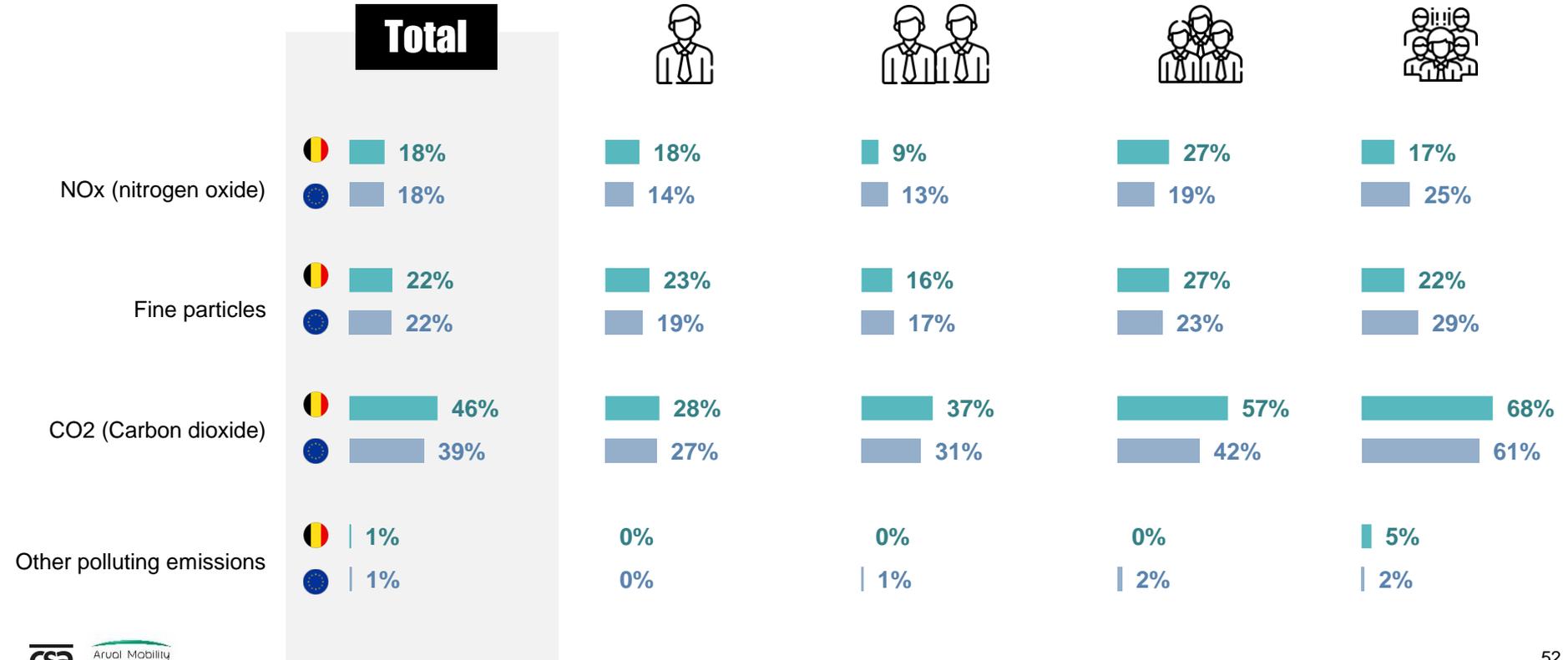


# EMISSIONS CONSIDERED IN THE CAR POLICY

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"

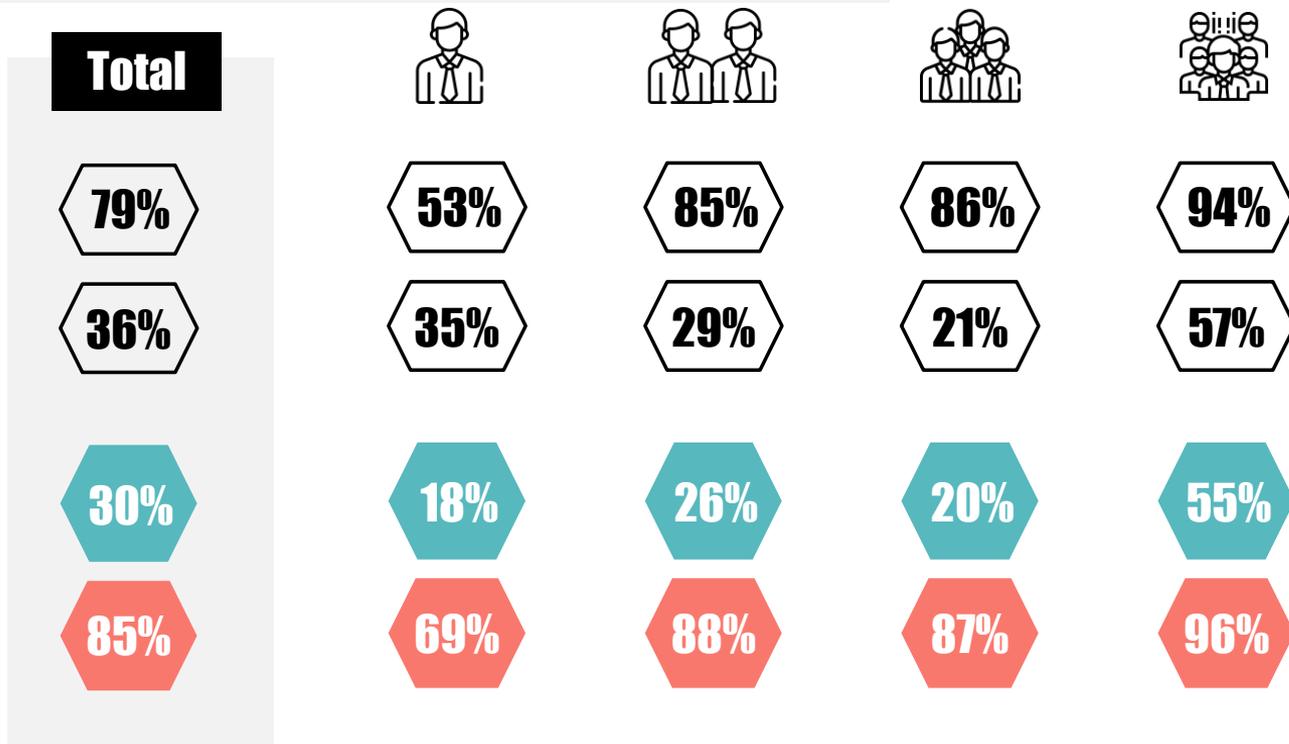
Proportion of companies taking into account the following pollutant emission in their fleet policy



# EXPECTED BEHAVIOUR CONCERNING CHARGING POINTS OF ELECTRIC VEHICLES

E33. Concerning the charging of your Electric Vehicles batteries, do you consider...  
 Basis: companies having or considering the use of electric vehicles

Proportion of companies considering to set up charging points in the companies or to assist employees for private installation



# ENERGIES AT STAKE – ENERGY MIX

## Potential development of hybrid and electric energies

Already implemented + considered in the next 3 years



At least Hybrid or Plug-in-Hybrid or Electric



41% 28%

Incl. Small and medium companies



71% 55%

Incl. Large companies



## Compensations expected by companies due to WLTP test introduction



#1 To choose different models or makes with lower emissions level

26%

38%

46%

70%

#2 To choose different energies

19%

23%

40%

50%

## Companies taken actions to reduce fleet emission



38%

43%

58%

71%



40%

43%

54%

68%



# FINANCING

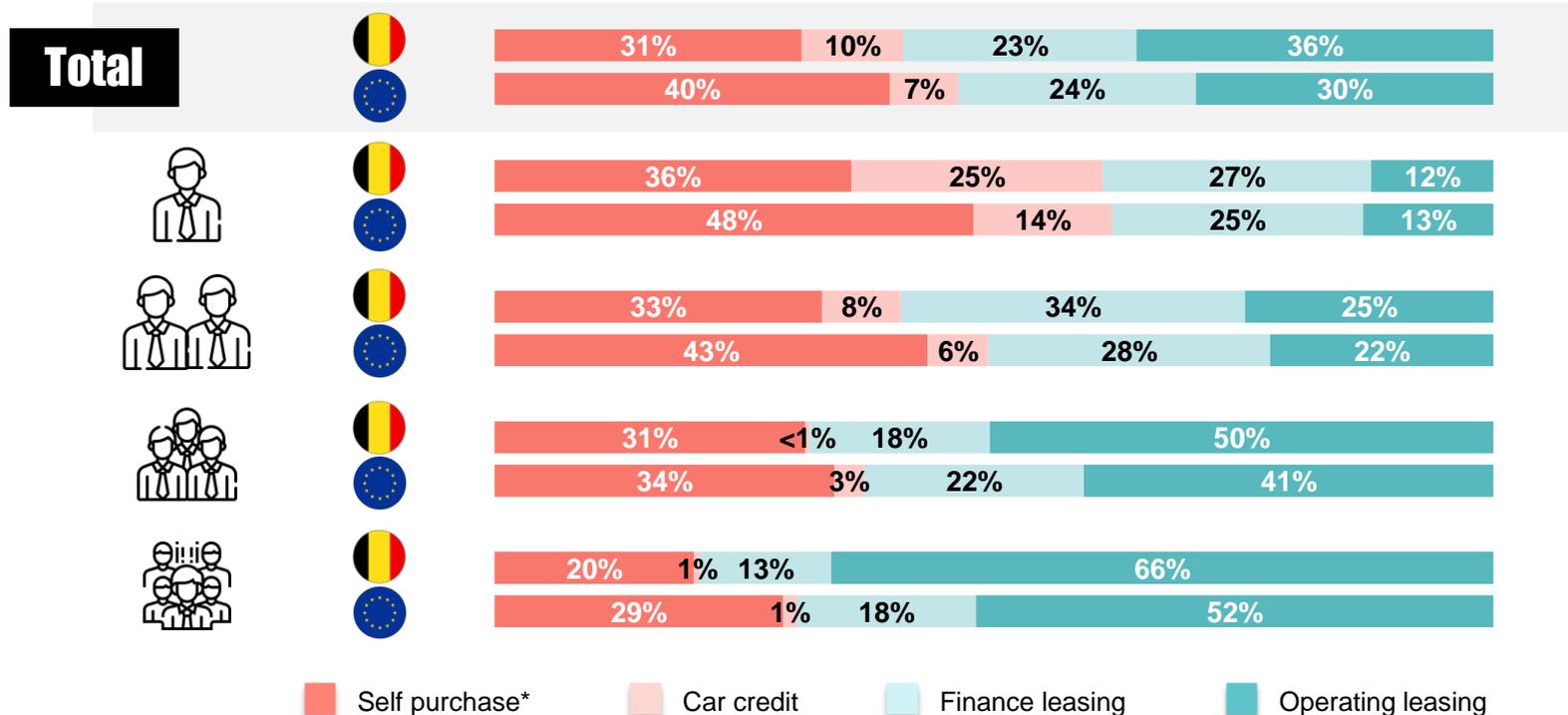
---

# 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



\*Self-purchase = outright purchase + credit (other than car credit)  
 Data have been consolidated: 3 years average

# EVOLUTION OF THE MAIN FINANCING METHOD

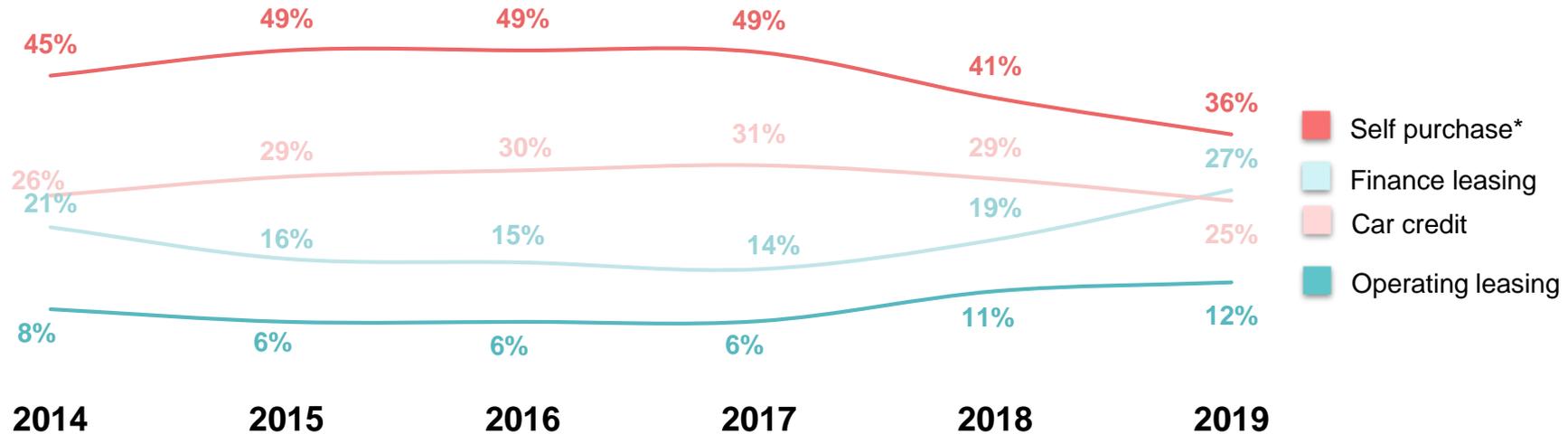
## FOCUS ON 1 TO 9

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

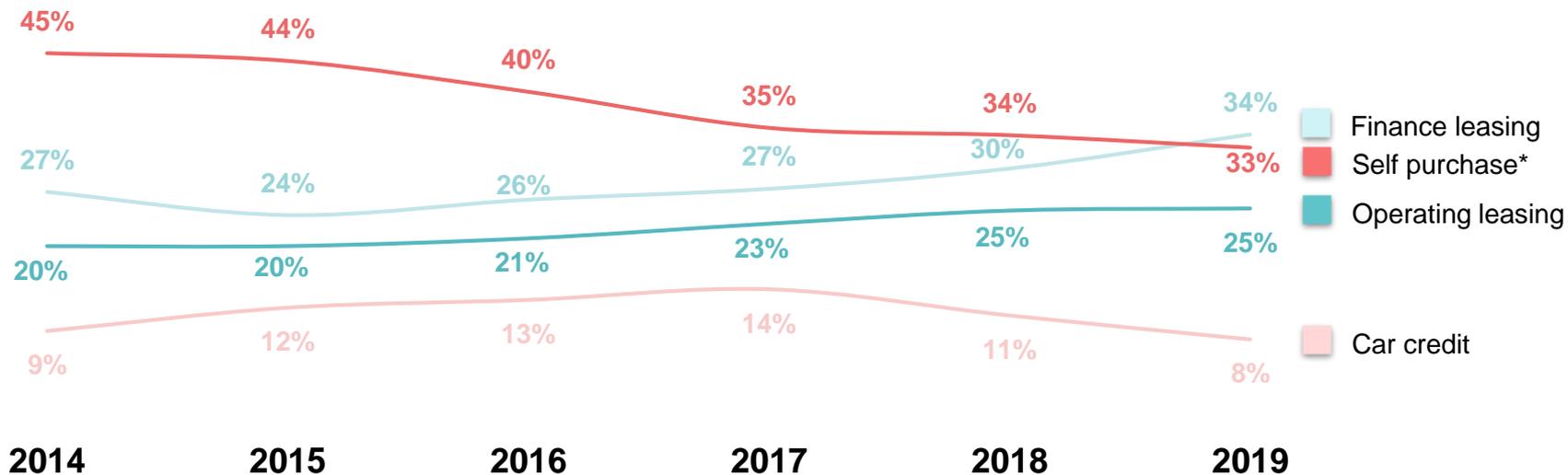
## FOCUS ON 10 TO 99

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

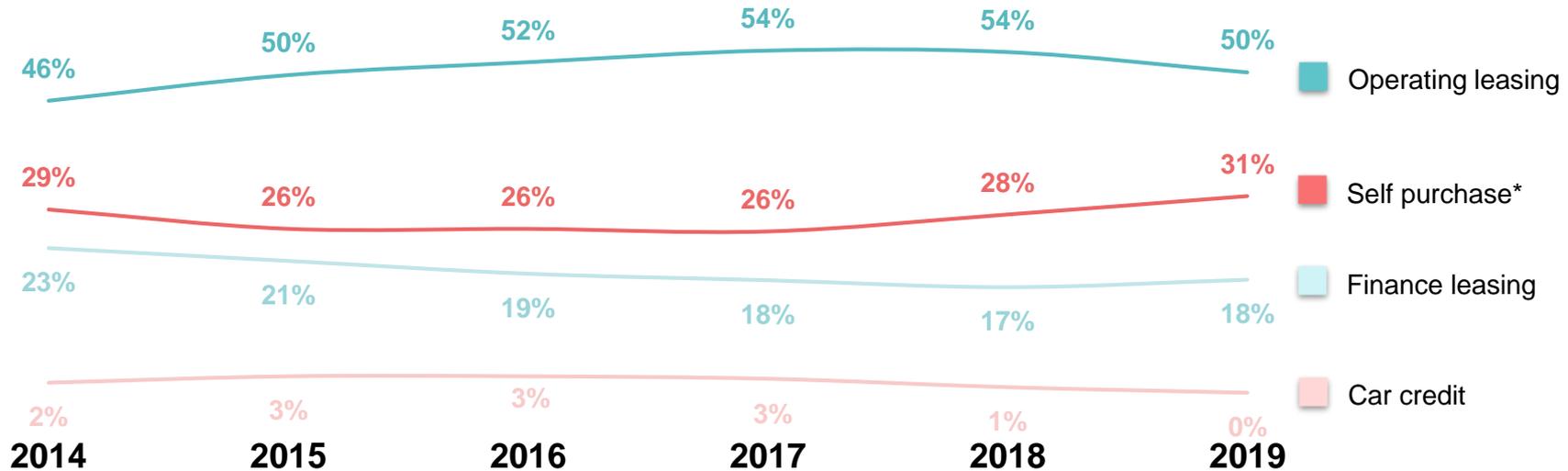
## FOCUS ON 100 TO 499

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

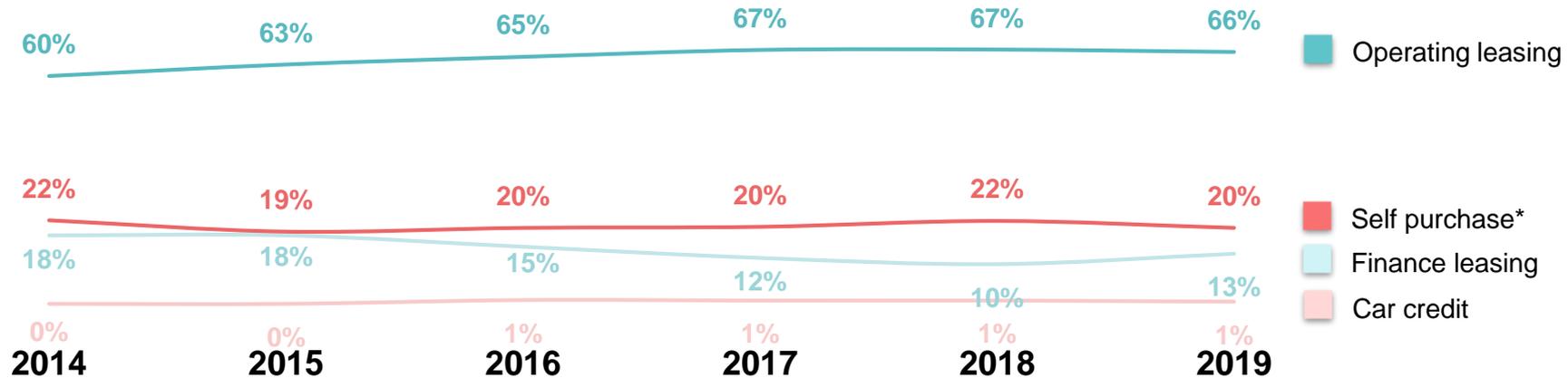
## FOCUS ON 500 AND MORE

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

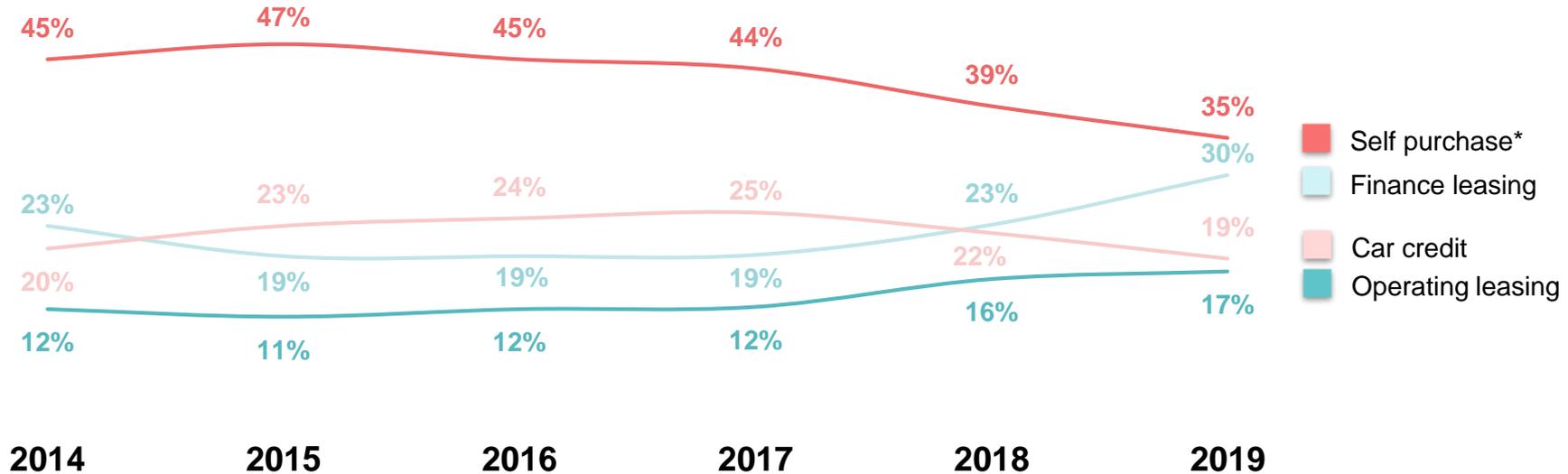
## FOCUS ON 1 TO 99

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

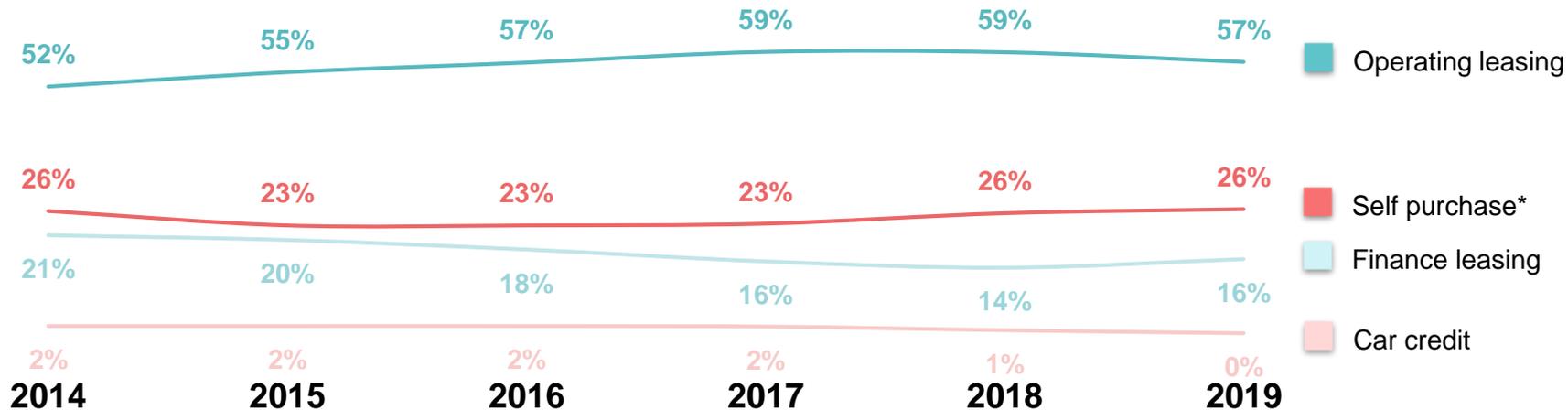
## FOCUS ON 100 AND MORE

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

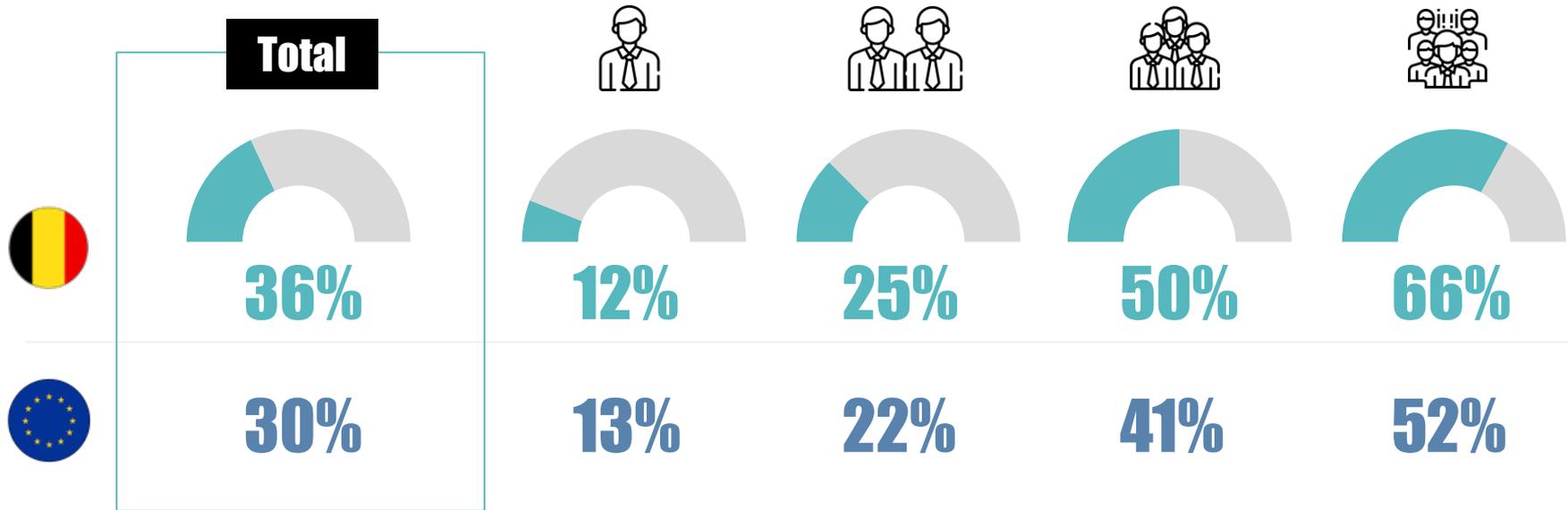
Results provided for 2016 are calculated by the mean of an extrapolation between the results of the years 2015 and 2017.

# MAIN FINANCING METHOD – FOCUS OPERATING LEASING

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

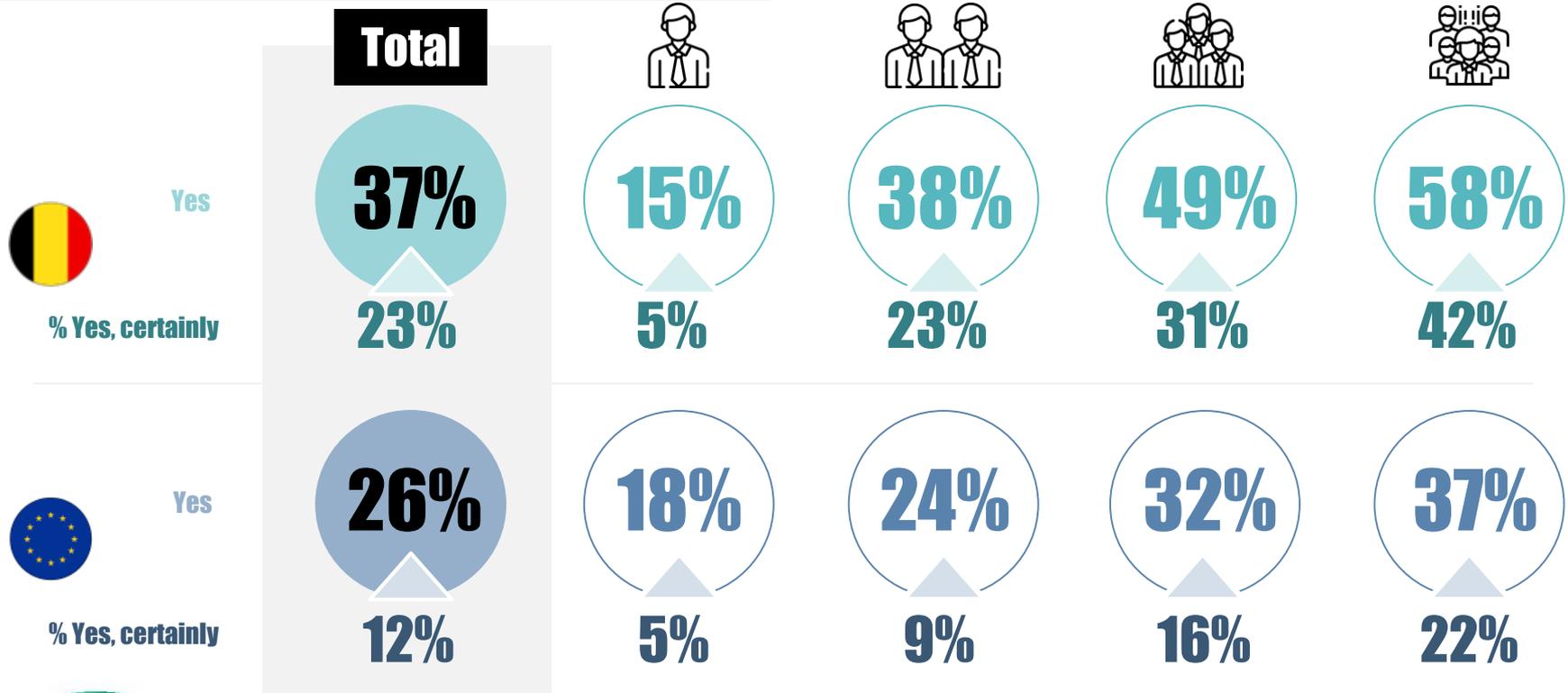


# INTENTION TO DEVELOP OPERATING LEASING

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

Basis: companies with corporate vehicles = 100%

Proportion of companies having the intention to develop operational leasing



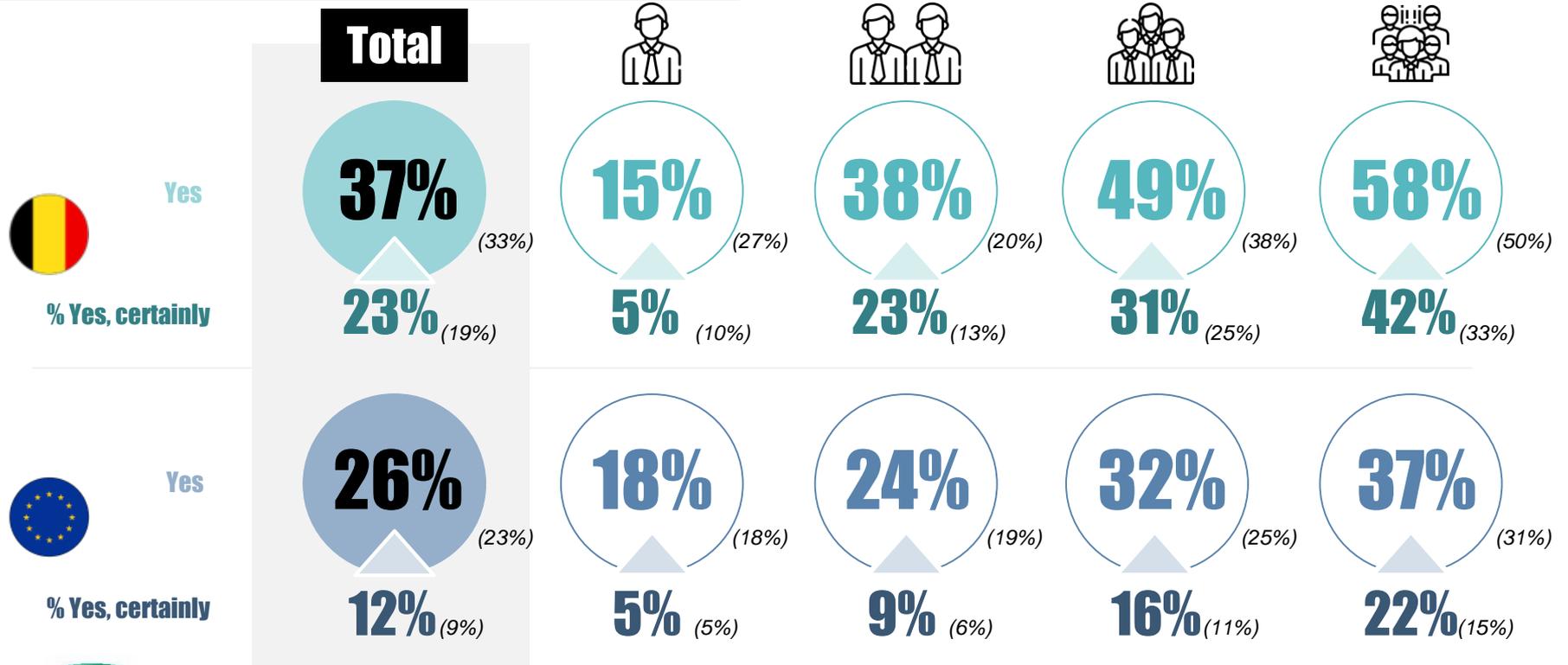
# INTENTION TO DEVELOP OPERATING LEASING

(2019 versus 2018)

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

Basis: companies with corporate vehicles = 100%

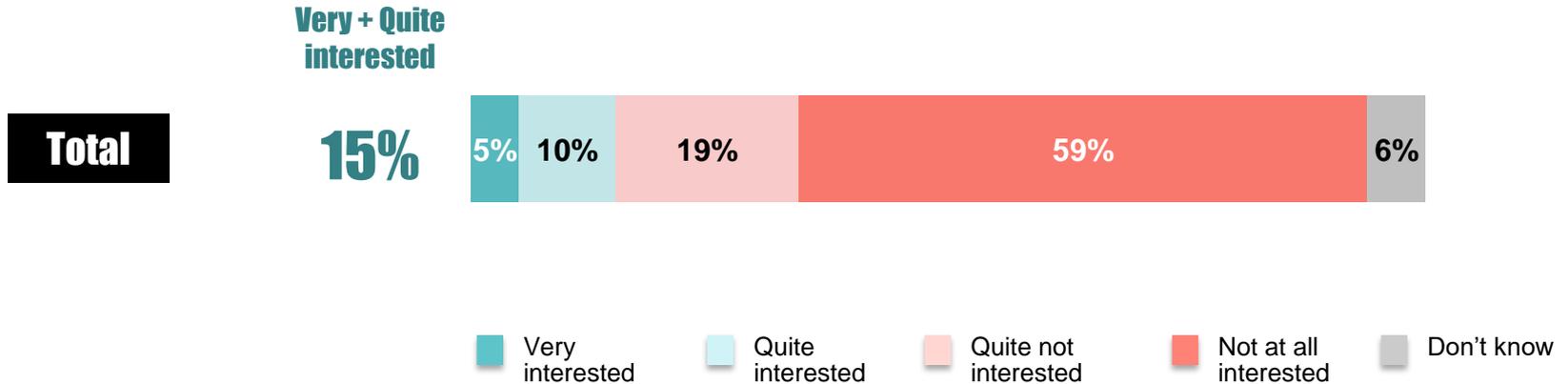
Proportion of companies having the intention to develop operational leasing



# INTEREST IN FLEET MANAGEMENT SOLUTIONS AS AN ALTERNATIVE TO OPERATING LEASING

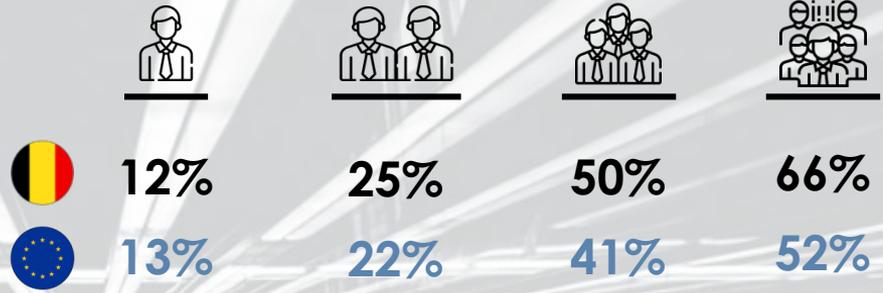
## FOR COMPANIES USING OPERATION LEASING

TR4. As an alternative solution to Operating Leasing, would you be interested in fleet management solutions for your company?  
Basis: companies using operating leasing

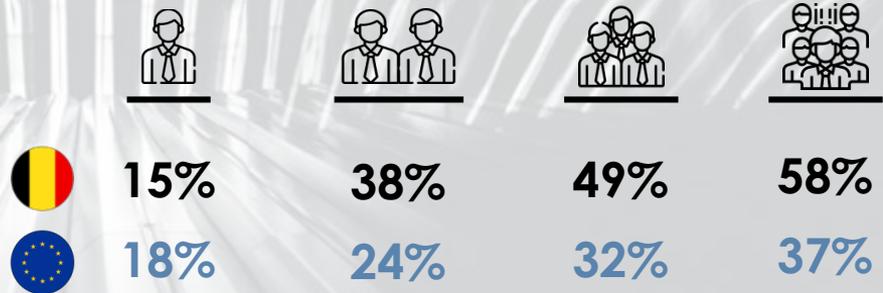


# FINANCING METHOD

## OPERATIONG LEASING AS MAIN FINANCING METHOD



## INTENTION TO DEVELOP OPERATING LEASING



## INTEREST OF COMPANIES USING OPERATING LEASING FOR FLEET MANAGEMENT SOLUTIONS



Very + Quite interested

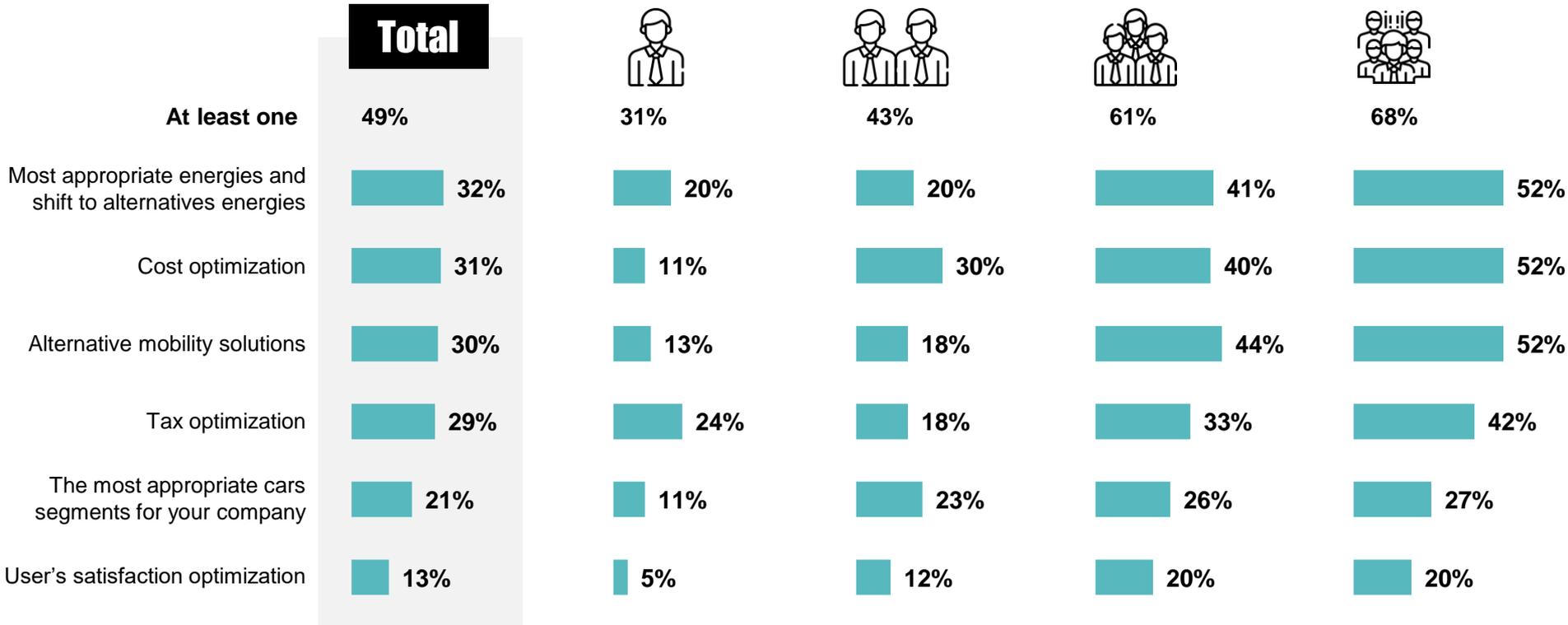
**IV**

# **FLEET MANAGEMENT AND CONSULTING**

---

# INTEREST FOR ADVICE ON FLEET MANAGEMENT SUBJECTS

BE14. Would you be interested in receiving advices from an external supplier on the following topics? Several responses possible.  
 Column percentage – the sum of the responses can be higher than 100% because respondents could give several responses.  
 Basis: companies with corporate vehicles = 100%



V

# TELEMATICS, DIGITAL TOOLS AND ROAD SAFETY

---

**V**

# TELEMATICS, DIGITAL TOOLS AND ROAD SAFETY

---

**A**

## TELEMATICS

# USE OF TELEMATICS

E23c. Have you implemented Telematics within your fleet? Telematics enables transmission of data to monitor fuel consumption, driver behaviour, vehicle location, driver's impact on environment... from vehicles on the move. Data is transmitted by means of an original or after sales equipment or box installed in the vehicle. Telematics do not include data transmission by the mean of the users' smartphones..

Basis: companies with corporate vehicles = 100%

Proportion of companies having implemented telematics in their fleet

YES, FOR ALL OR PART OF THE FLEET

**All vehicles**  
(passenger cars + LCVs)



# USE OF TELEMATICS

(2019 versus 2018)

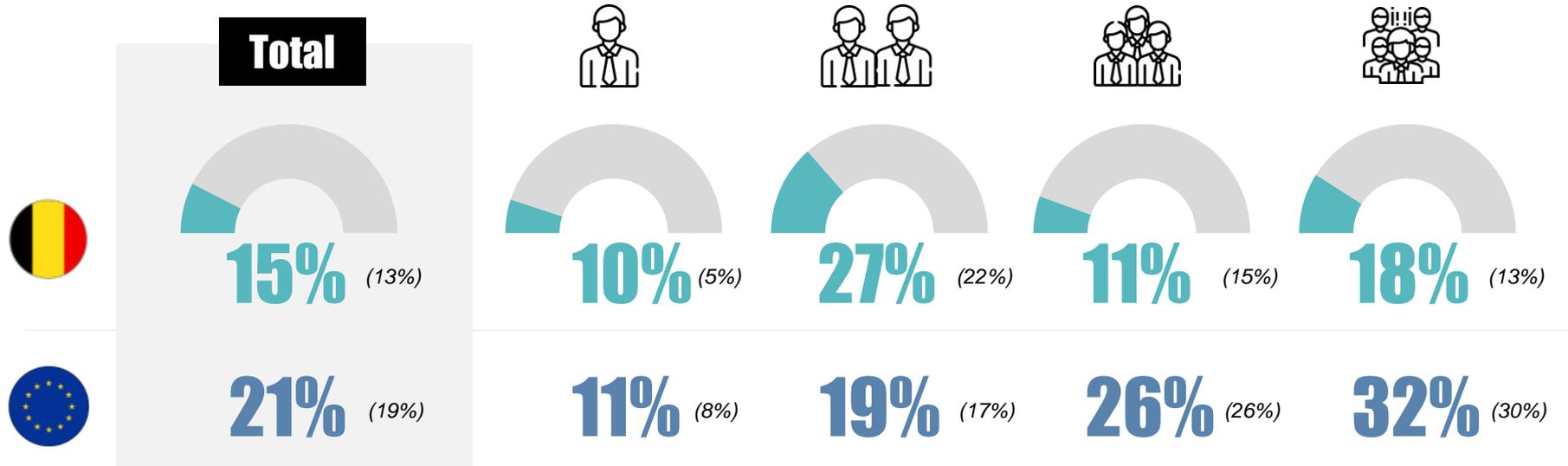
E23c. Have you implemented Telematics within your fleet? Telematics enables transmission of data to monitor fuel consumption, driver behaviour, vehicle location, driver's impact on environment... from vehicles on the move. Data is transmitted by means of an original or after sales equipment or box installed in the vehicle. Telematics do not include data transmission by the mean of the users' smartphones..

Basis: companies with corporate vehicles = 100%

Proportion of companies having implemented telematics in their fleet

YES, FOR ALL OR PART OF THE FLEET

**All vehicles**  
(passenger cars + LCVs)



# PROPORTION OF COMPANIES USING TELEMATICS

E23c. Have you implemented Telematics within your fleet? Telematics enables transmission of data to monitor fuel consumption, driver behaviour, vehicle location, driver's impact on environment... from vehicles on the move. Data is transmitted by means of an original or after sales equipment or box installed in the vehicle. Telematics do not include data transmission by the mean of the users' smartphones..

YES, FOR ALL OR PART OF THE FLEET



**With regards to passenger cars**



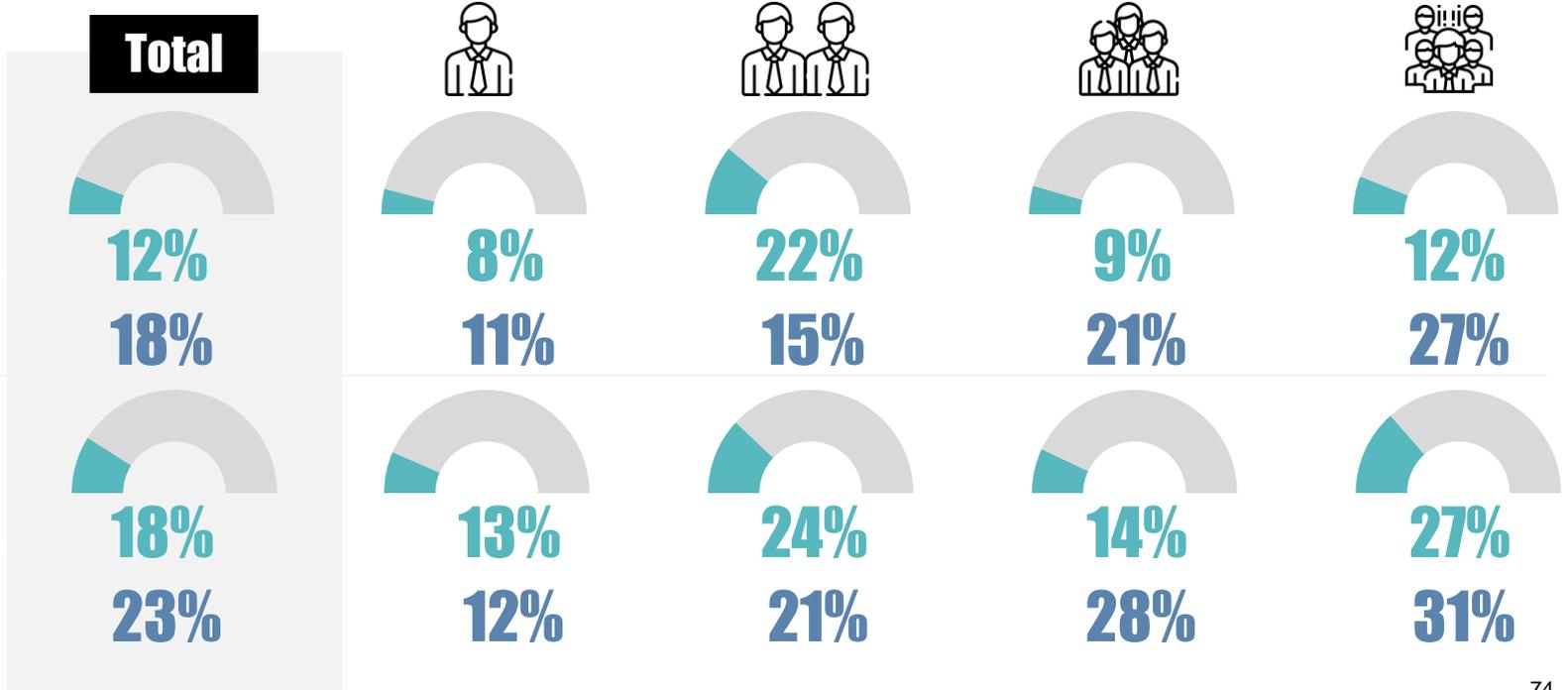
Basis: companies with at least one car in fleet = 100%



**With regards to LCVs**



Basis: companies with at least one LCV in fleet = 100%

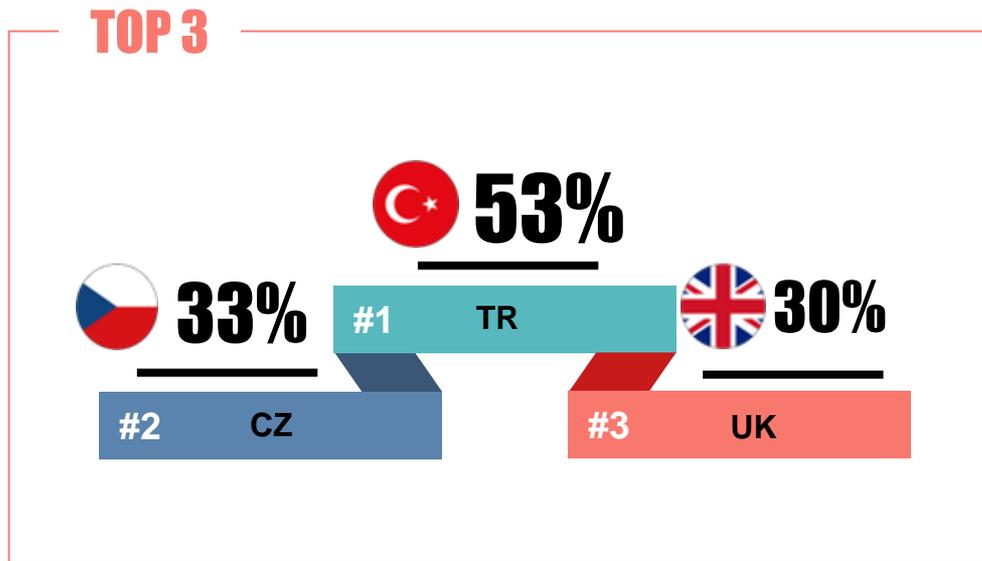


# PROPORTION OF COMPANIES USING TELEMATICS

E23c. Have you implemented Telematics within your fleet? Telematics enables transmission of data to monitor fuel consumption, driver behaviour, vehicle location, driver's impact on environment... from vehicles on the move. Data is transmitted by means of an original or after sales equipment or box installed in the vehicle. Telematics do not include data transmission by the mean of the users' smartphones..

Basis: companies with corporate vehicles = 100%

Proportion of companies having implemented telematics in their fleet



#4		NL	27%
#5		PL	27%
#6		ES	27%
#7		PT	20%
#8		LU	19%
#9		BE	15%
#10		IT	15%
#11		CH	13%
#12		FR	12%
#13		DE	11%



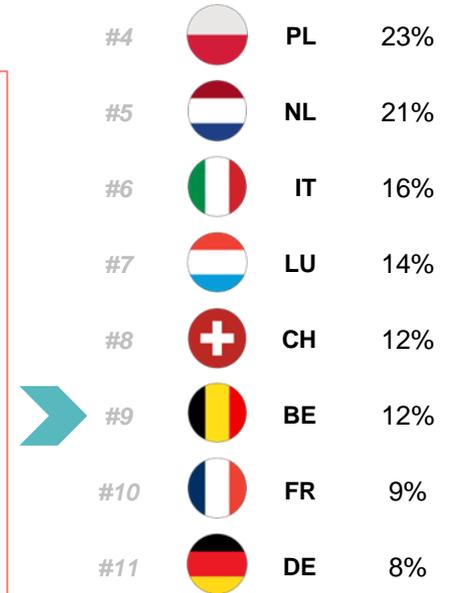
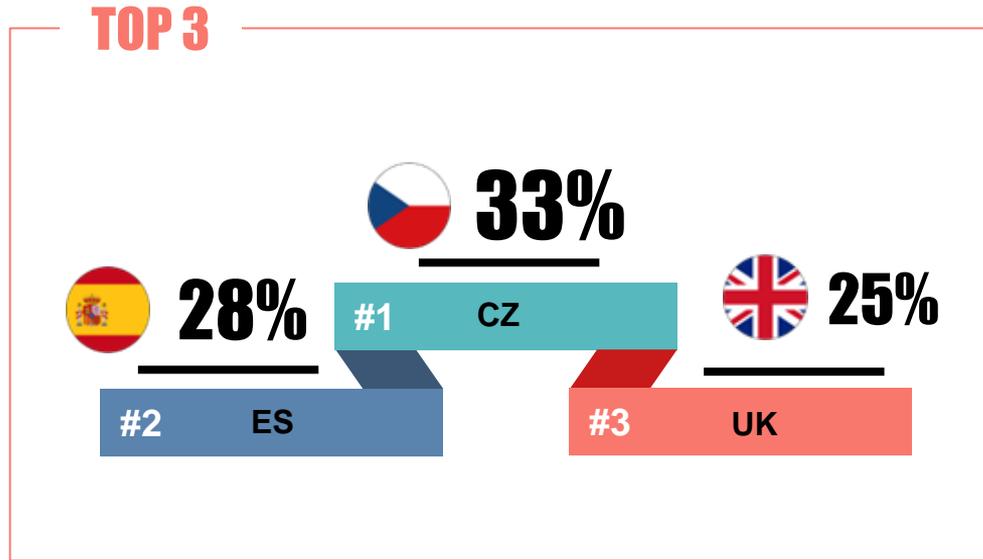
# PROPORTION OF COMPANIES USING TELEMATICS

## With regards to passenger cars

E23c\_1. Have you implemented Telematics within your fleet? Telematics enables transmission of data to monitor fuel consumption, driver behaviour, vehicle location, driver's impact on environment... from vehicles on the move. Data is transmitted by means of an original or after sales equipment or box installed in the vehicle. Telematics do not include data transmission by the mean of the users' smartphones... with regards to cars

Basis: Companies with cars.

Proportion of companies having implemented telematics in their cars





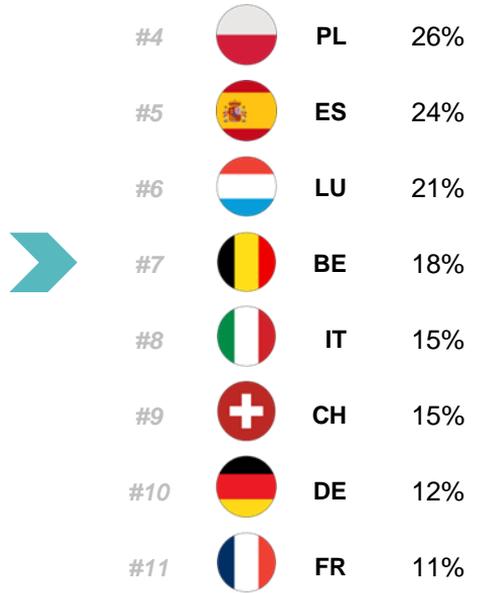
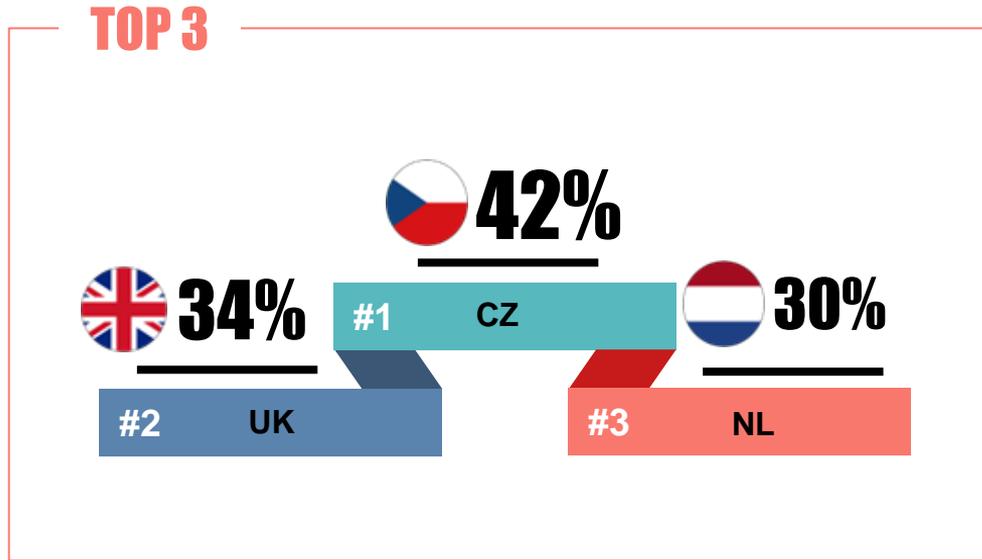
# PROPORTION OF COMPANIES USING TELEMATICS

## With regards to LCVs

E23c\_2. Have you implemented Telematics within your fleet? Telematics enables transmission of data to monitor fuel consumption, driver behaviour, vehicle location, driver's impact on environment... from vehicles on the move. Data is transmitted by means of an original or after sales equipment or box installed in the vehicle. Telematics do not include data transmission by the mean of the users' smartphones.. with regards to cars

Basis: Companies with LCVS

Proportion of companies having implemented telematics in their LCVS

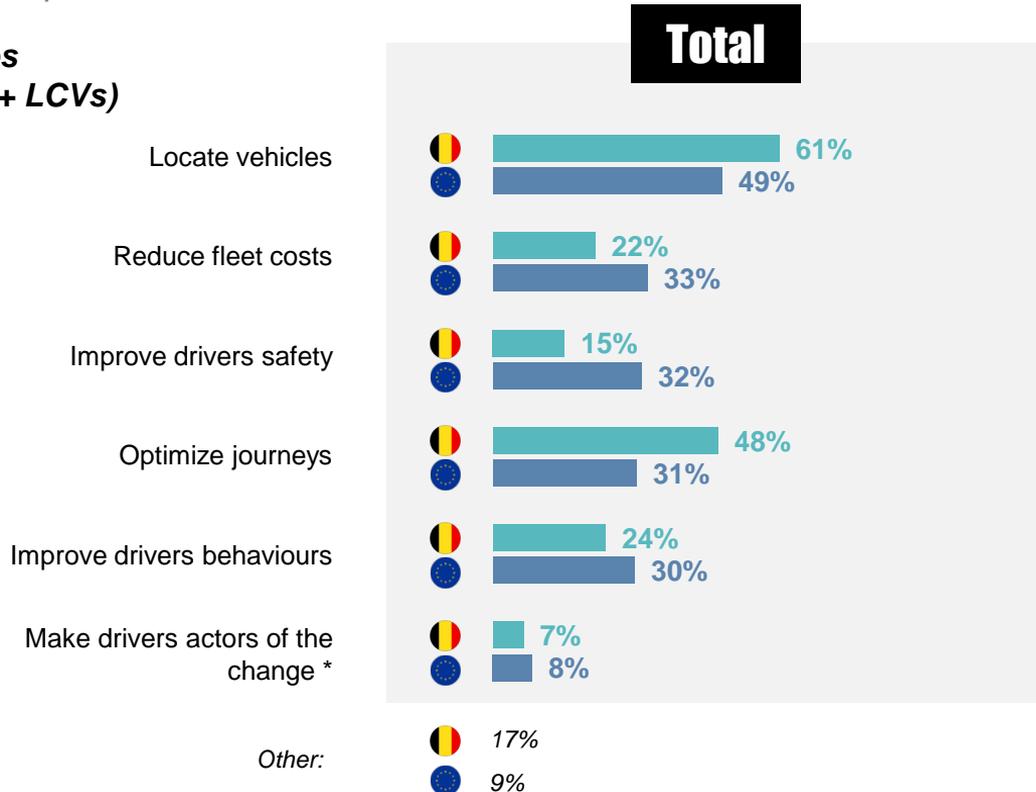


# PURPOSES FOR USING TELEMATICS

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

Basis: companies which has implemented telematics

## All vehicles (passenger cars + LCVs)

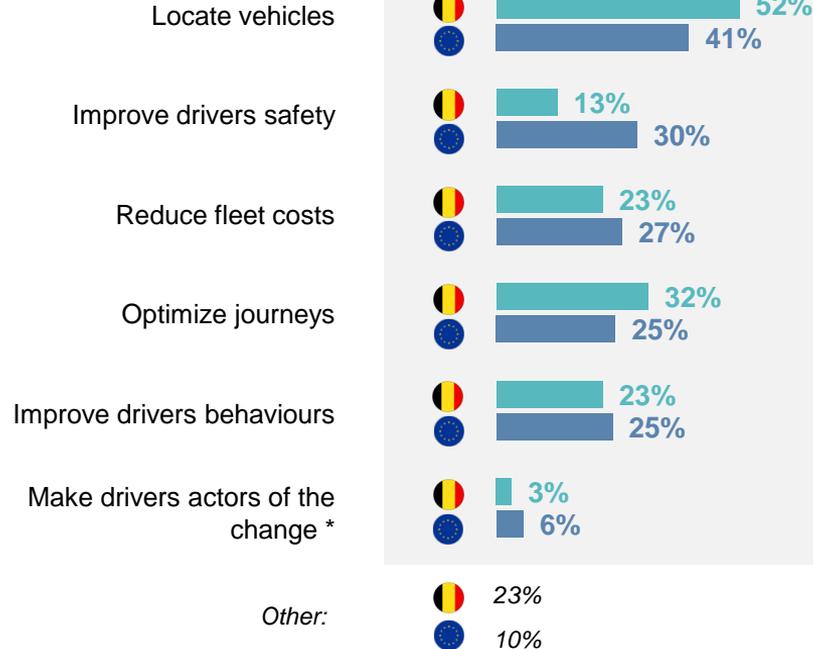


# PURPOSES FOR USING TELEMATICS

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

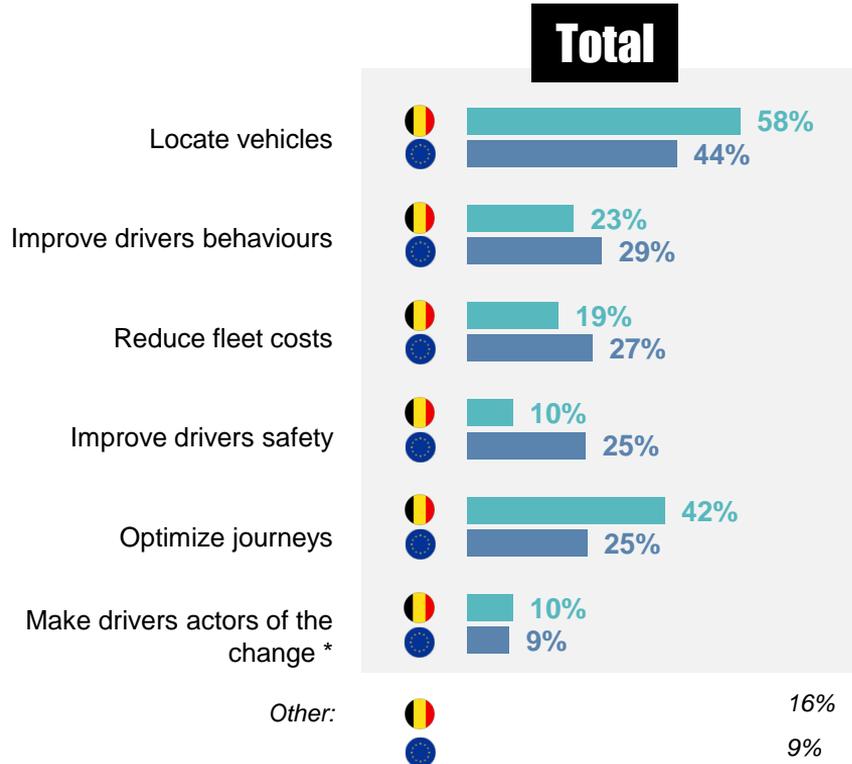
Basis: companies with cars which has implemented telematics

## PASSENGER CARS



# PURPOSES FOR USING TELEMATICS

E25ab. What are the two main reasons you use telematics in your company fleet?  
 Basis: companies with LCVs which has implemented telematics



# INTEREST IN A SERVICE PROVEN TO REDUCE FLEET COSTS BY USING VEHICLE DATA FROM TELEMATICS

E30. If a company offered you a service proven to reduce fleet costs by using vehicle data from telematics, would you be interested?

Basis: companies with corporate vehicles = 100%

% of interest



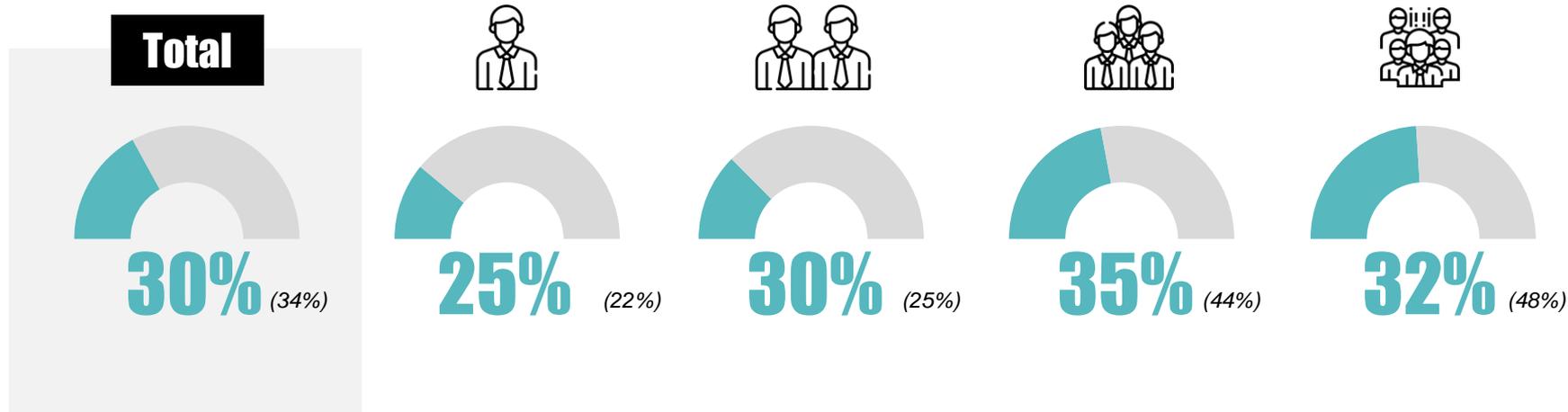
# INTEREST IN A SERVICE PROVEN TO REDUCE FLEET COSTS BY USING VEHICLE DATA FROM TELEMATICS

(2019 versus 2018)

E30. If a company offered you a service proven to reduce fleet costs by using vehicle data from telematics, would you be interested?

Basis: companies with corporate vehicles = 100%

% of interest

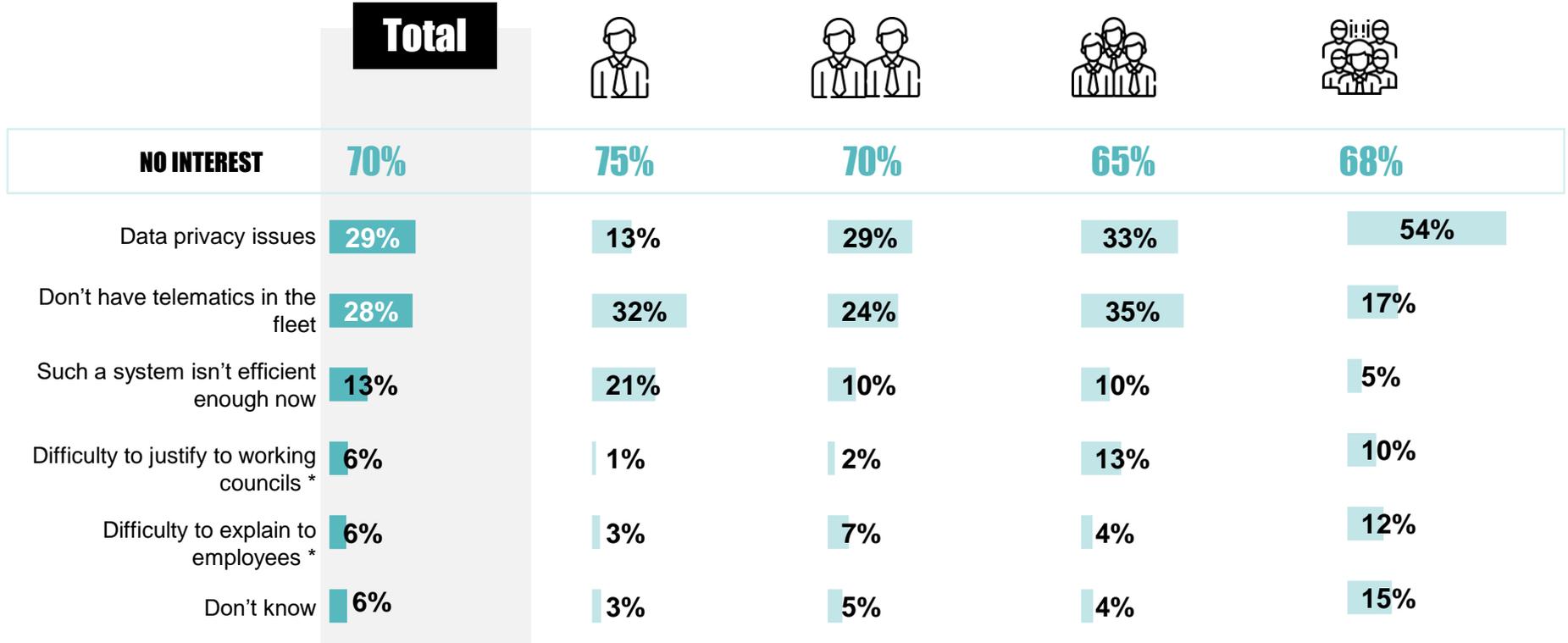


# REASONS OF NO INTEREST IN SUCH SERVICE USING TELEMATICS

E30. If a company offered you a service proven to reduce fleet costs by using vehicle data from telematics, would you be interested?

E31. For which reasons are you not interested to use such a system in your company fleet? Items read out by the interviewer

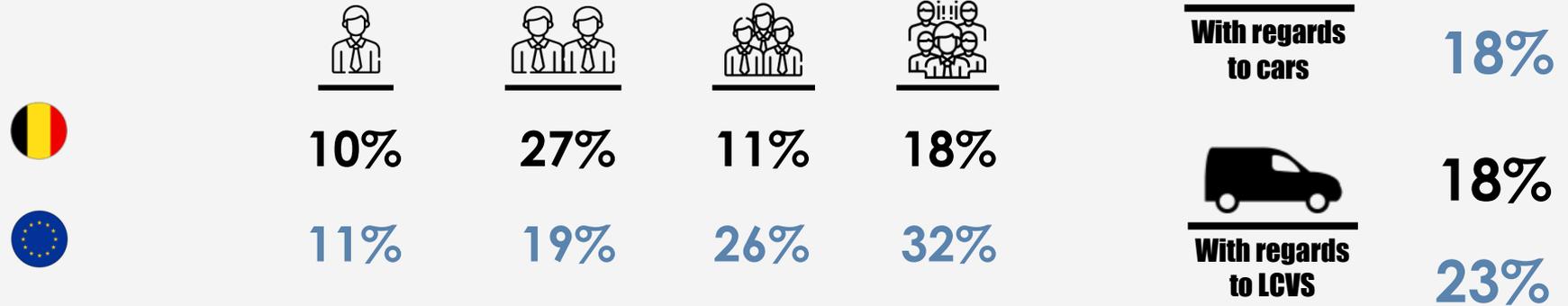
Basis: companies not interested in such service using telematics in E30



# TELEMATICS

## Use of the telematics:

*For all or part of the fleet*



## Main reasons to use telematics:

*Among users*



**V**

# TELEMATICS, DIGITAL TOOLS AND ROAD SAFETY

---

**B**

ROAD SAFETY

# DRIVERS BEHAVIOUR MONITORING

UK29. Does your company monitor drivers' behaviour?  
Basis: companies with corporate vehicles = 100%

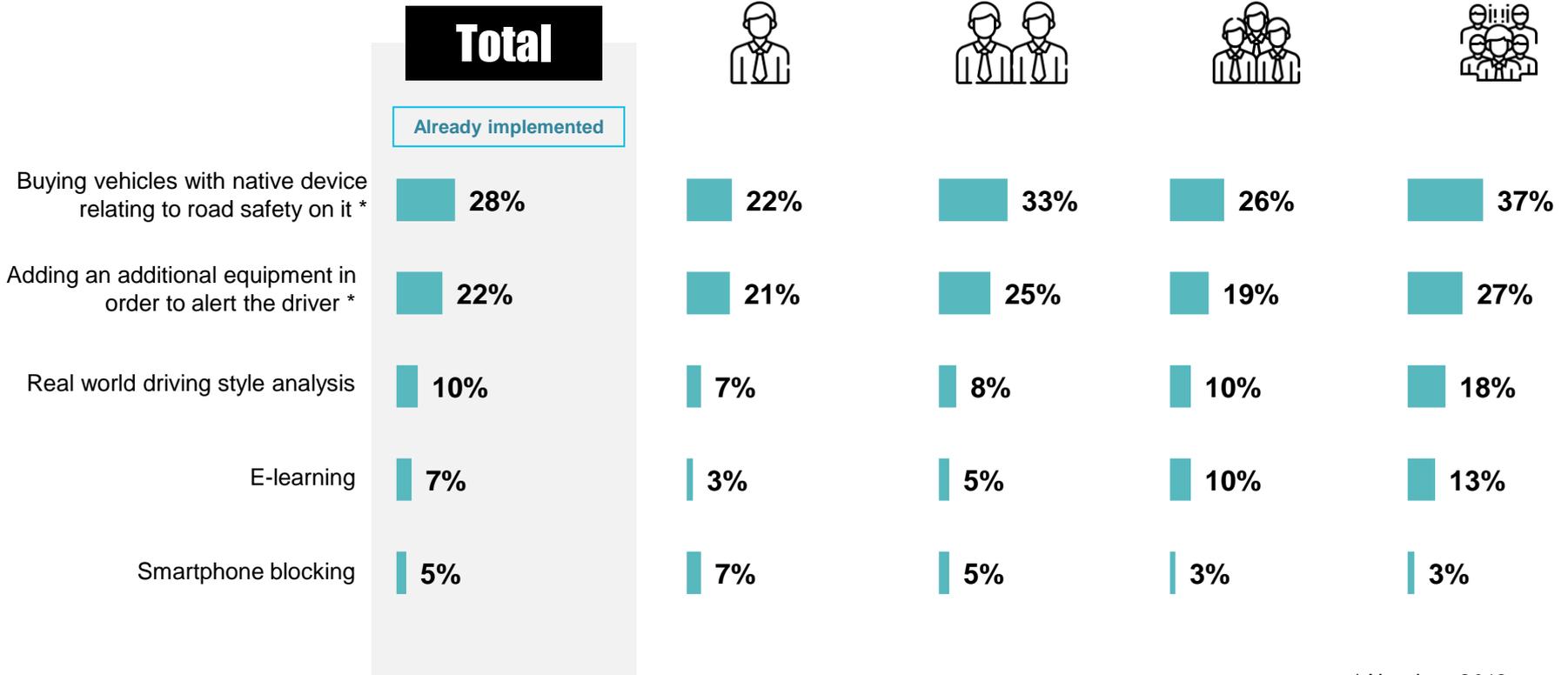
Proportion of companies that monitor drivers' behaviour



# ACTIONS TAKEN IN ORDER TO INCREASE ROAD SAFETY

NL16. In order to increase road safety, does your company set up the following actions?

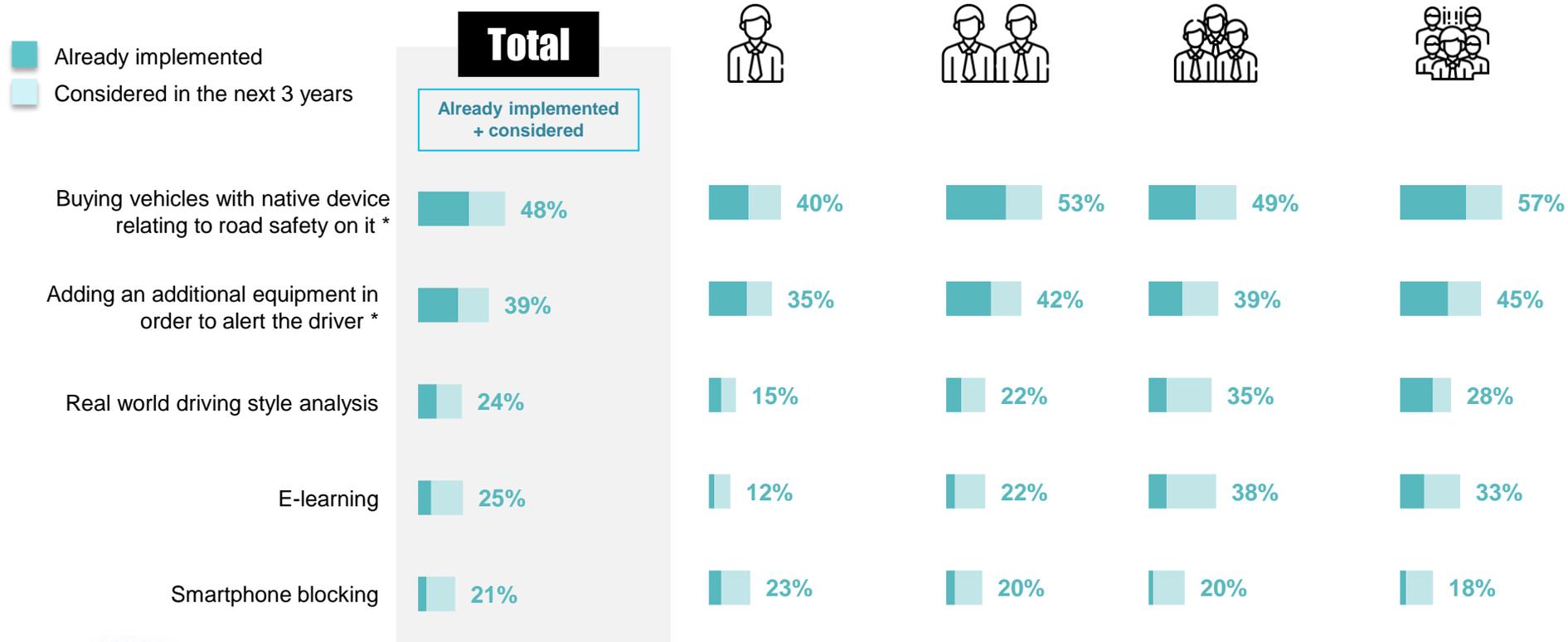
Basis: companies with corporate vehicles = 100%



\* New item 2019

# ACTIONS TAKEN IN ORDER TO INCREASE ROAD SAFETY

NL16. In order to increase road safety, does your company set up the following actions?  
 Basis: companies with corporate vehicles = 100%



**VI**

# **ALTERNATIVE MOBILITIES**

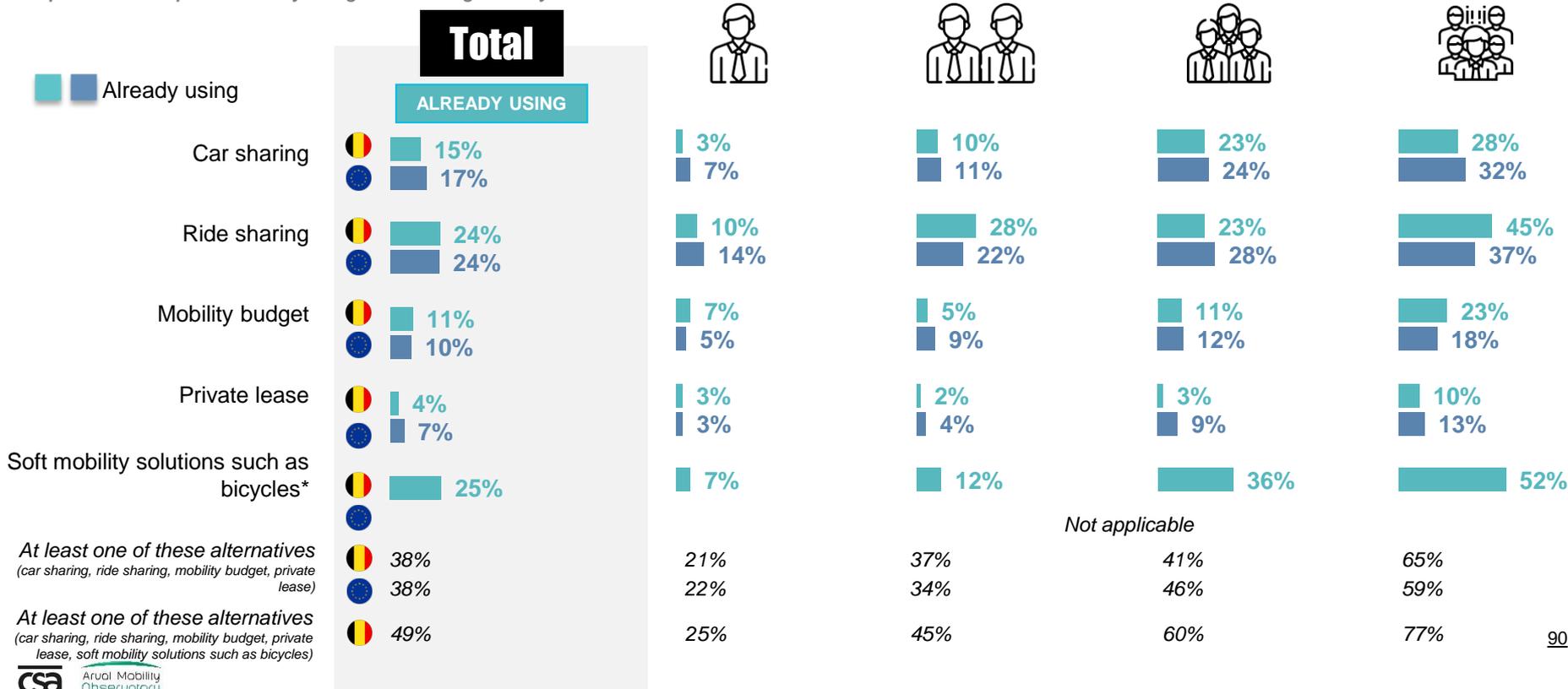
---

# CURRENT USE OF ALTERNATIVE MOBILITIES

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

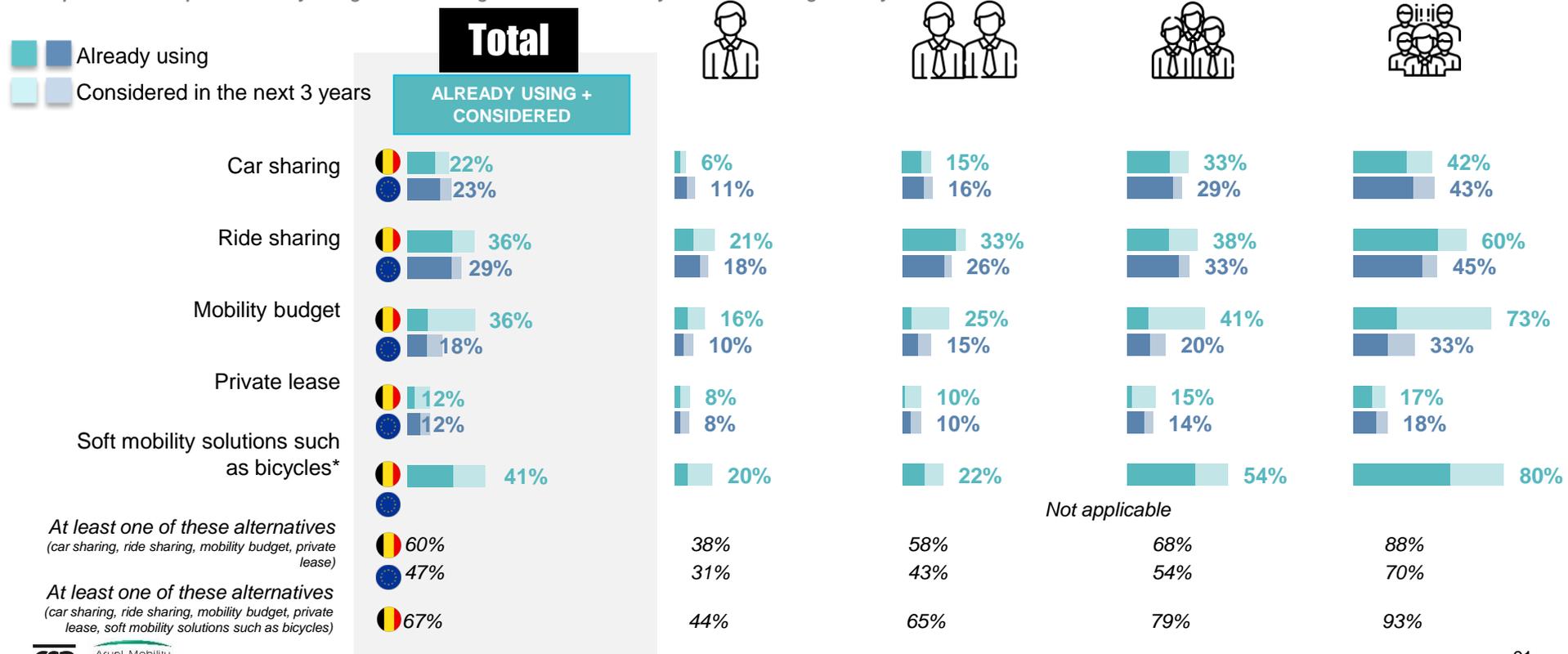


# POTENTIAL DEVELOPMENT OF ALTERNATIVE MOBILITIES

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



# POTENTIAL DEVELOPMENT OF ALTERNATIVE MOBILITIES

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

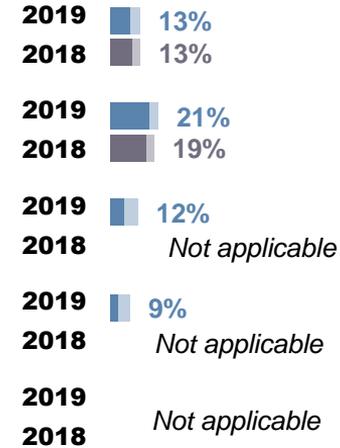
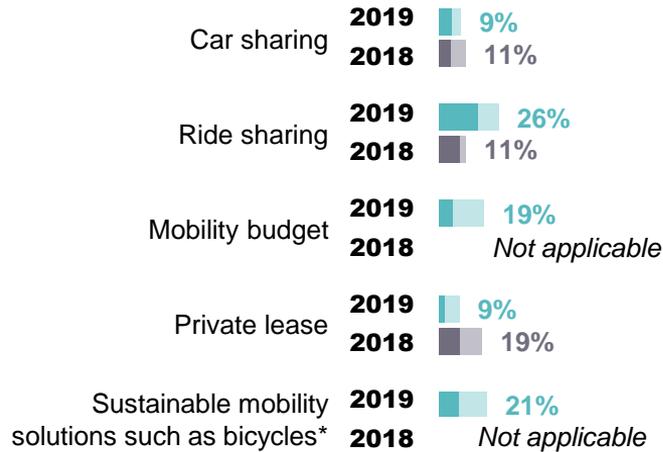


Already using

Considered in the next 3 years



ALREADY USING +  
CONSIDERED



# POTENTIAL DEVELOPMENT OF ALTERNATIVE MOBILITIES

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%

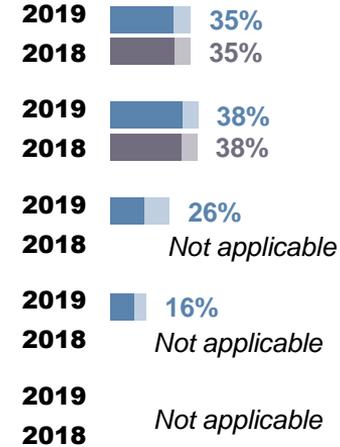
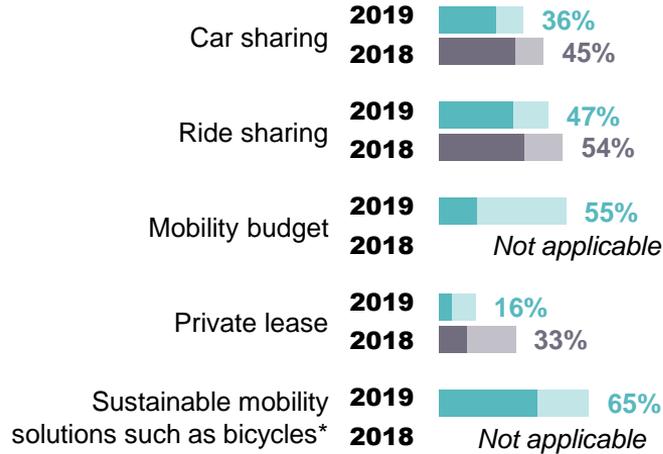
Proportion of companies already using or considering to use in the next 3 years the following mobility alternatives



Already using  
 Considered in the next 3 years



ALREADY USING +  
 CONSIDERED



# POTENTIAL DEVELOPMENT OF ALTERNATIVE MOBILITIES

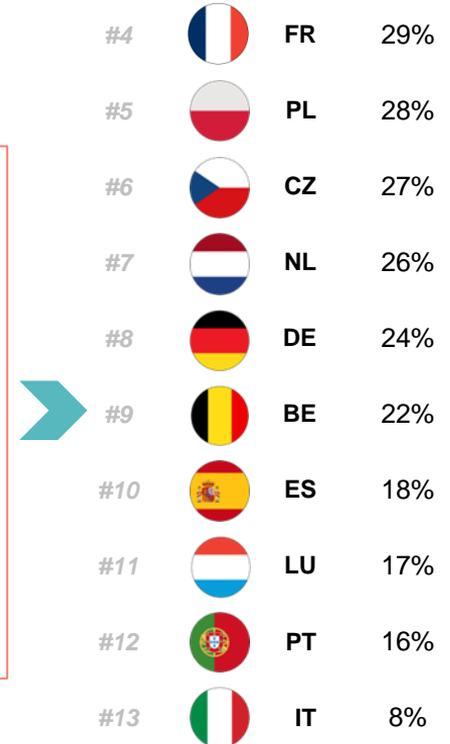
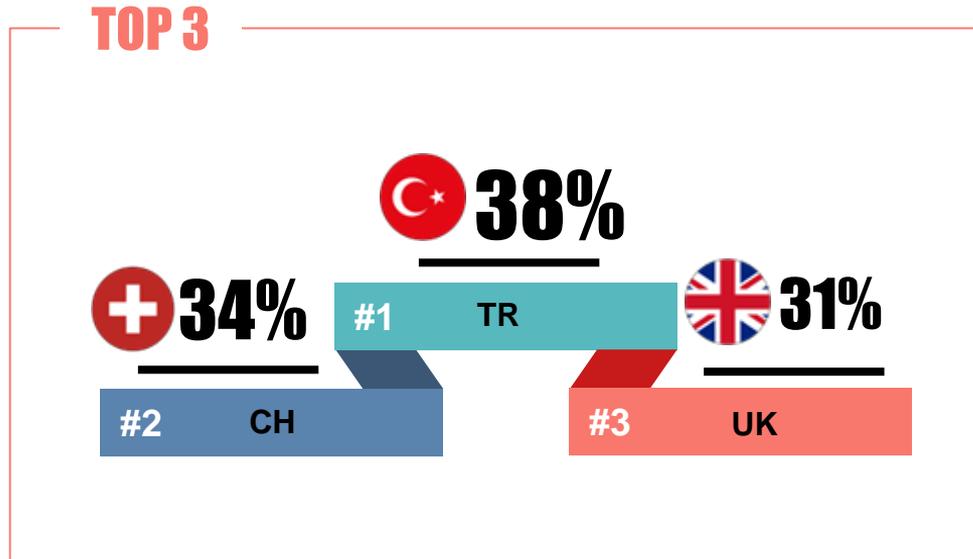
## CAR SHARING

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

Basis: companies with corporate vehicles = 100%

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

% Already implemented + considered in the next 3 years



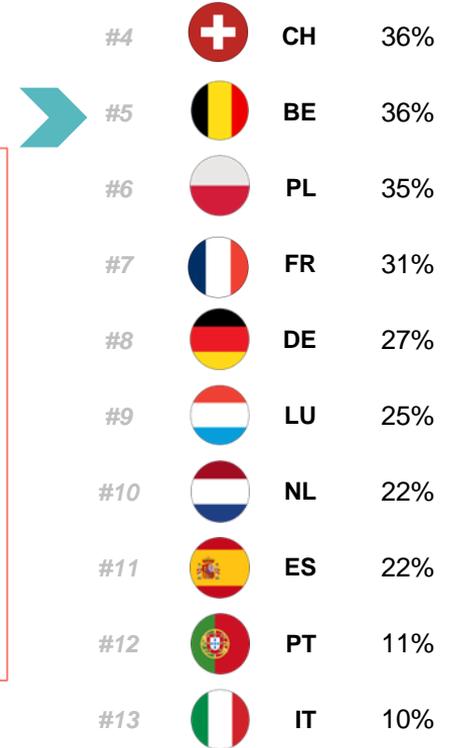
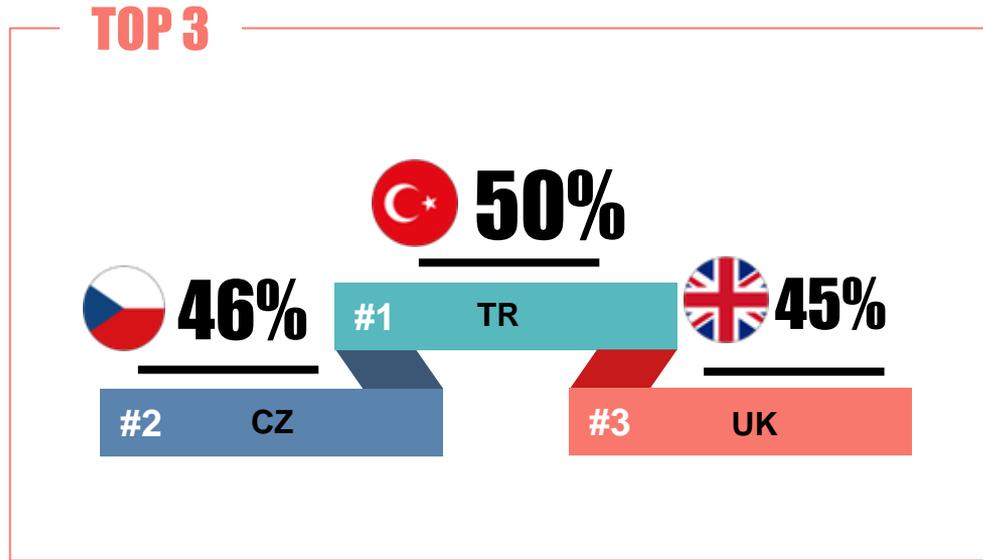
# POTENTIAL DEVELOPMENT OF ALTERNATIVE MOBILITIES

## 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 or considering to use in the next 3 years the following mobility alternatives

% Already implemented + considered in the next 3 years



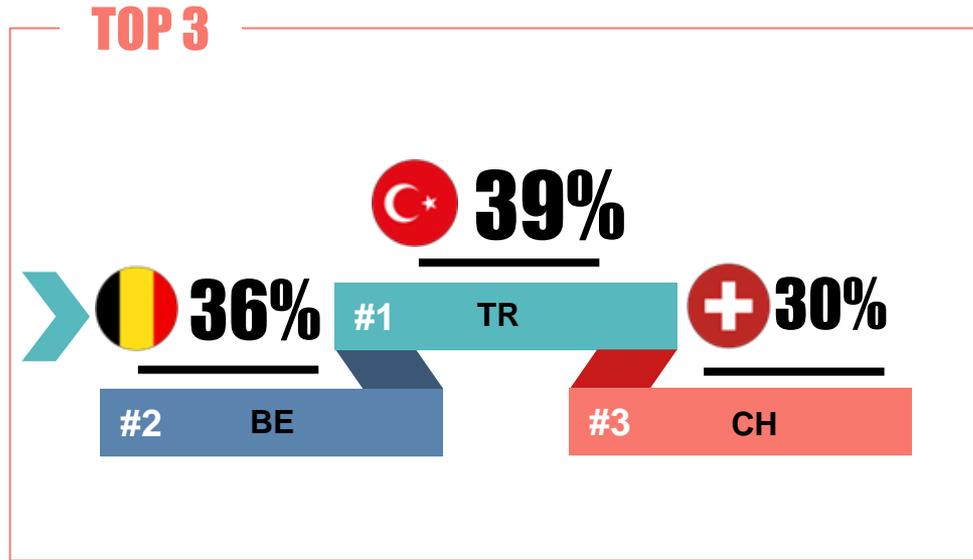
# POTENTIAL DEVELOPMENT OF ALTERNATIVE MOBILITIES

## 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 or considering to use in the next 3 years the following mobility alternatives

% Already implemented + considered in the next 3 years



#4		NL	27%
#5		UK	21%
#6		PL	20%
#7		DE	18%
#8		FR	16%
#9		ES	15%
#10		LU	14%
#11		IT	8%
#12		PT	7%
#13		CZ	7%

# POTENTIAL DEVELOPMENT OF ALTERNATIVE MOBILITIES

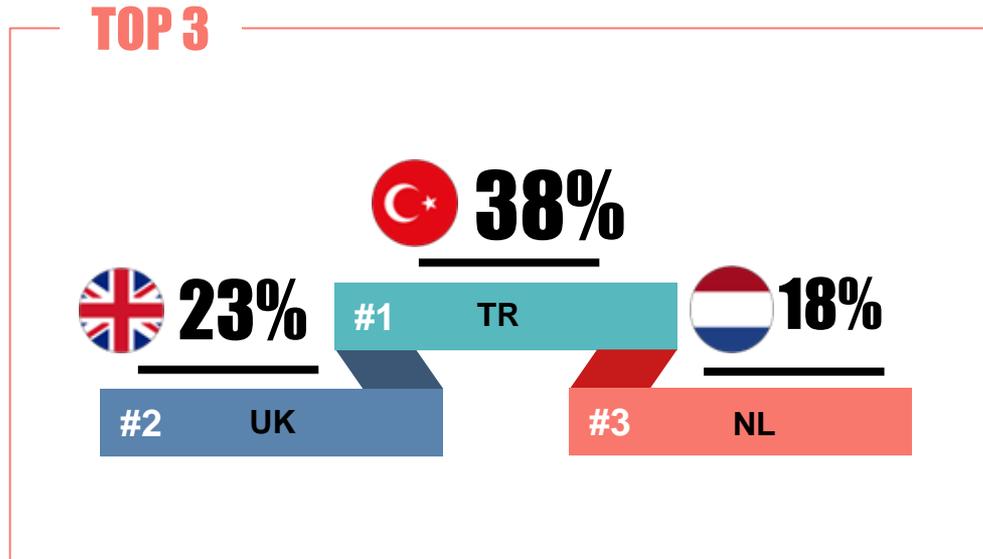
## PRIVATE LEASE

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

Basis: companies with corporate vehicles = 100%

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

% Already implemented + considered in the next 3 years



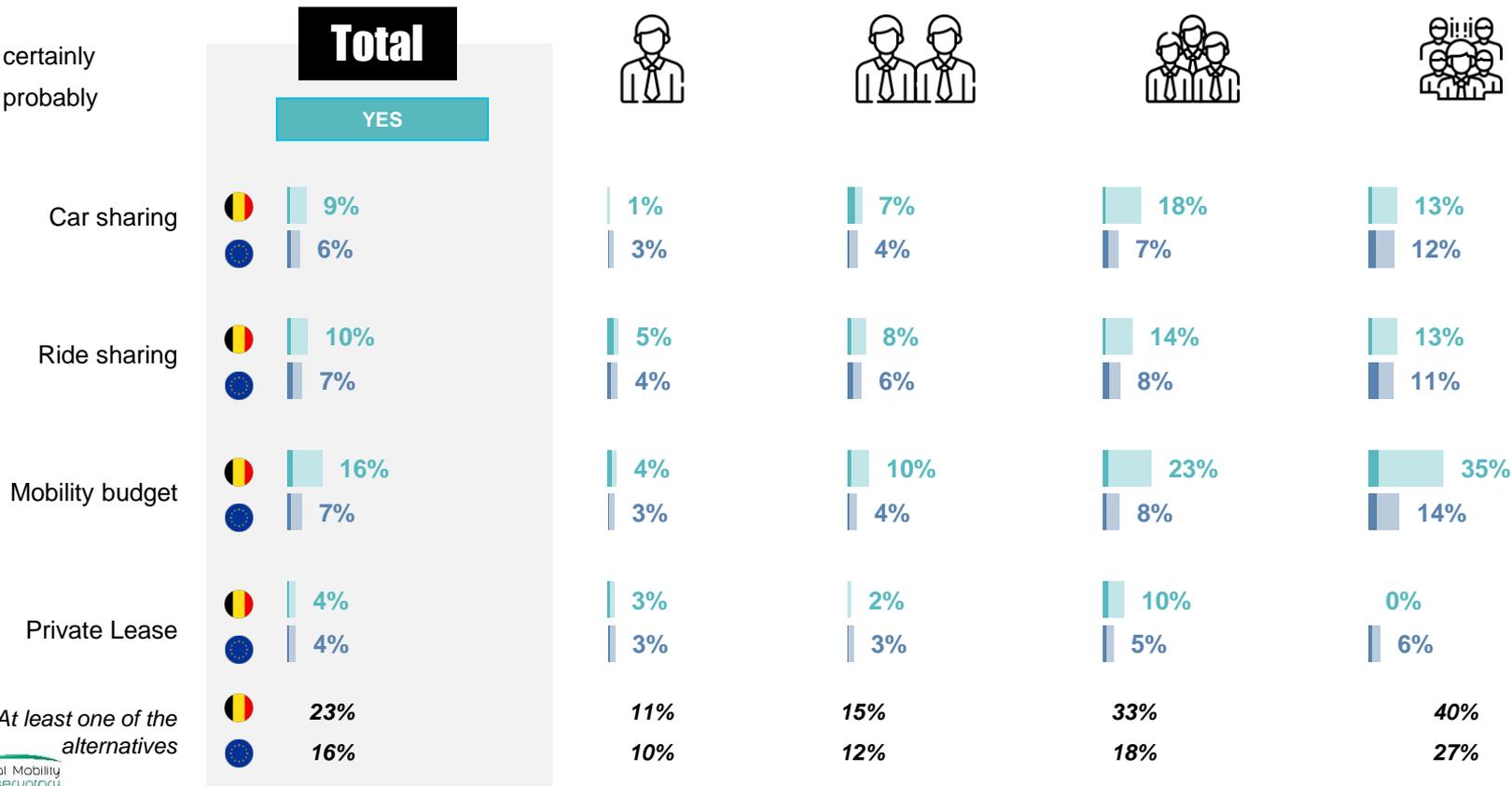
#4	 FR	14%
#5	 CH	12%
#6	 BE	12%
#7	 ES	11%
#8	 LU	12%
#9	 DE	10%
#10	 IT	9%
#11	 CZ	9%
#12	 PL	7%
#13	 PT	6%

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

MM10. 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



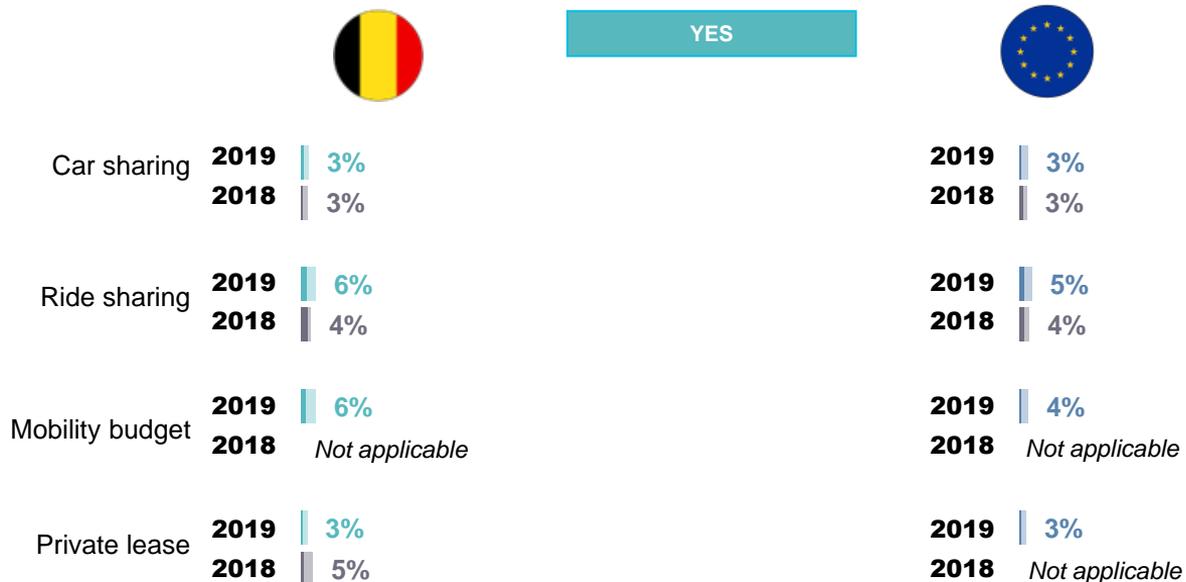
# PROPORTION OF COMPANIES READY TO GIVE UP ALL OR PART OF THEIR COMPANY CARS FOR ALTERNATIVE MOBILITY SOLUTIONS

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

Basis: companies with corporate vehicles = 100%



Yes certainly  
 Yes probably



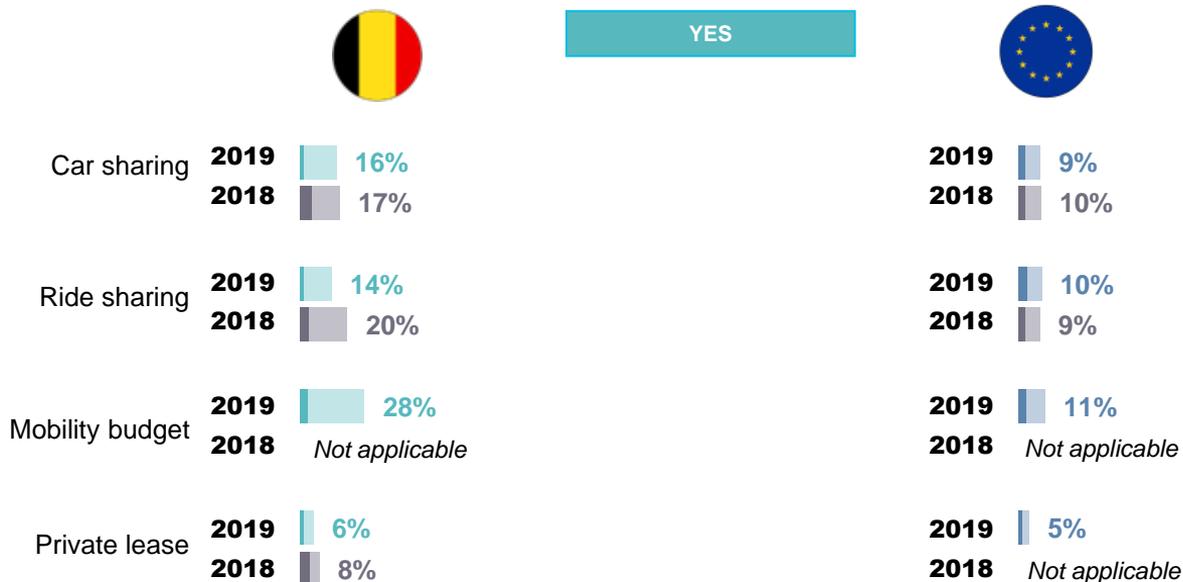
# PROPORTION OF COMPANIES READY TO GIVE UP ALL OR PART OF THEIR COMPANY CARS FOR ALTERNATIVE MOBILITY SOLUTIONS

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

Basis: companies with corporate vehicles = 100%



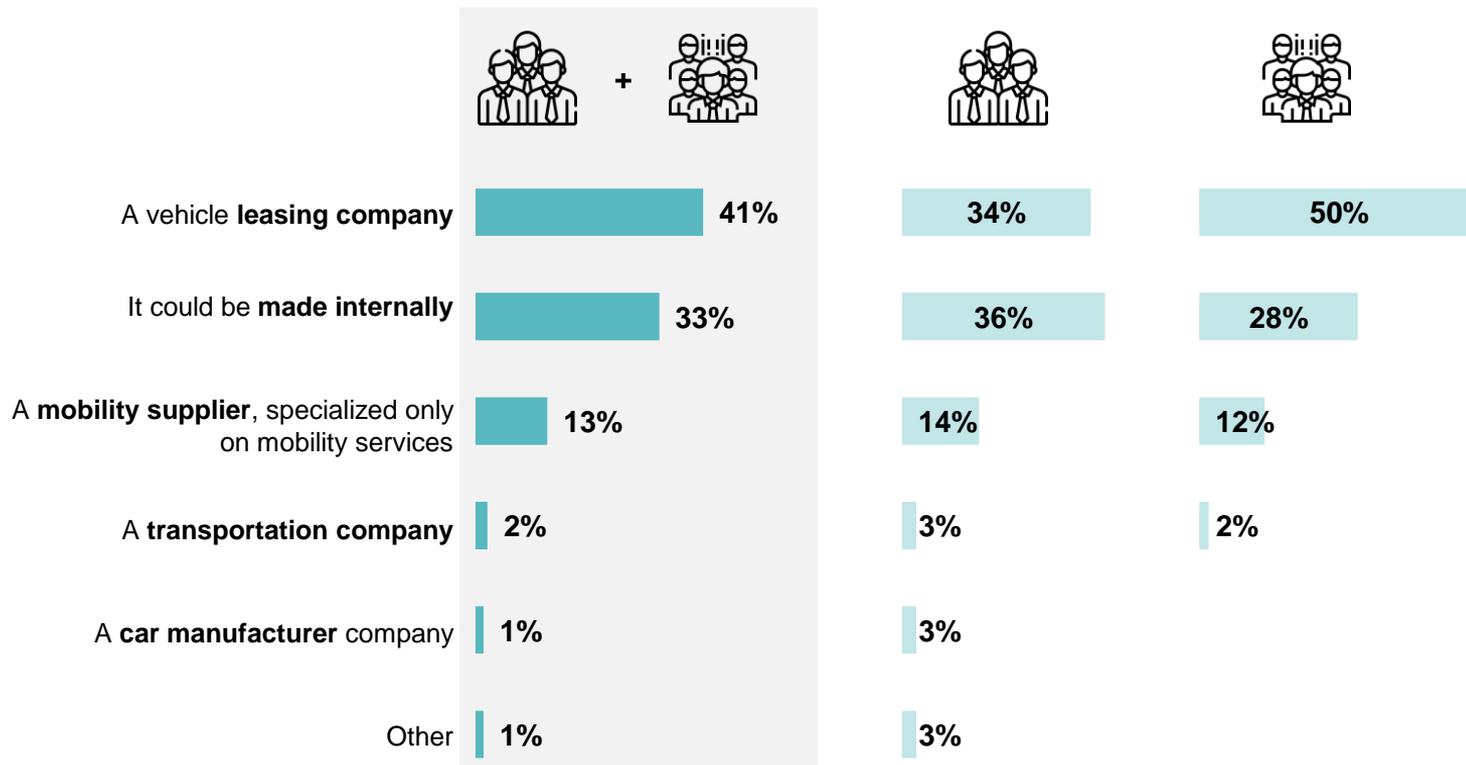
Yes certainly  
 Yes probably



# EXPECTED MOBILITY PROVIDER FOR FLEET MANAGEMENT

IT14. Who do you think could be the best suitable Mobility provider for fleet managers?

Basis: large and very large companies





# Perspective in terms of corporate mobility

## Potential development of mobility alternatives

Already implemented + considered in the next 3 years

 +   
Incl. Small and medium companies

 +   
Incl. Large companies

	Incl. Small and medium companies	Incl. Large companies
<b>At least one alternative</b>	<b>52%</b>	<b>85%</b>
📍 Car sharing	<b>9%</b>	<b>36%</b>
📍 Ride sharing	<b>26%</b>	<b>47%</b>
📍 Mobility budget	<b>19%</b>	<b>55%</b>
📍 Private Lease	<b>9%</b>	<b>16%</b>
📍 Sustainable mobility solution	<b>21%</b>	<b>65%</b>

## Proportion of companies ready to give up all or part of their company cars for such alternatives

Yes certainly

 +   
Incl. Small and medium companies

 +   
Incl. Large companies

	Incl. Small and medium companies	Incl. Large companies
<b>At least one alternative</b>	<b>13%</b>	<b>36%</b>
📍 Car sharing	<b>3%</b>	<b>16%</b>
📍 Ride sharing	<b>6%</b>	<b>14%</b>
📍 Mobility budget	<b>6%</b>	<b>28%</b>
📍 Private Lease	<b>3%</b>	<b>6%</b>

An aerial, top-down view of a large crowd of people walking on a checkered floor. The floor consists of large, dark and light gray squares. The people are scattered across the frame, some in small groups, some alone, and some in larger clusters. The overall scene is dimly lit, with the floor's pattern being the most prominent feature.

# 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