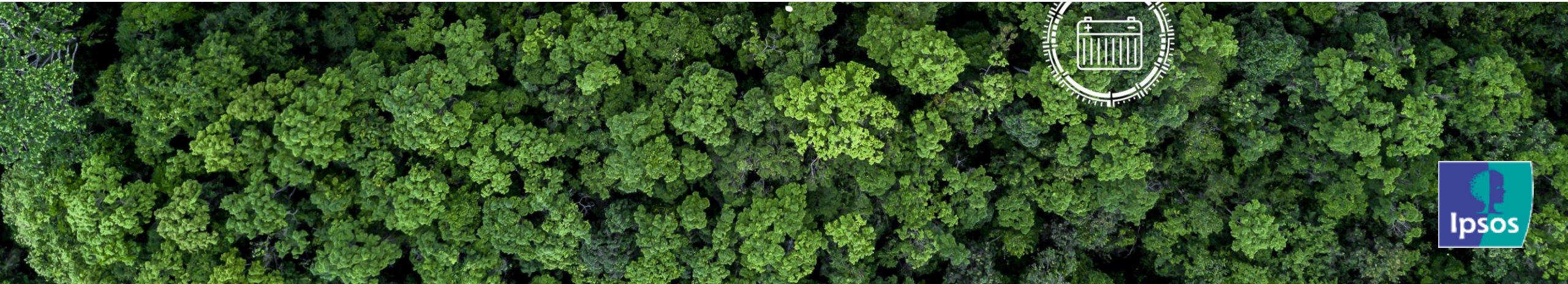
Arval Mobility Observatory

FLEET AND MOBILITY BAROMETER 2024

GLOBAL REPORT



Ipsos

2024 FLEET AND MOBILITY BAROMETER

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1

CONTEXT AND METHODOLOGY

KEY THEMES FOR ARVAL MOBILITY OBSERVATORY

1

WHAT SHORT TERM SHIFTS ARE SHAPING THE MARKET?

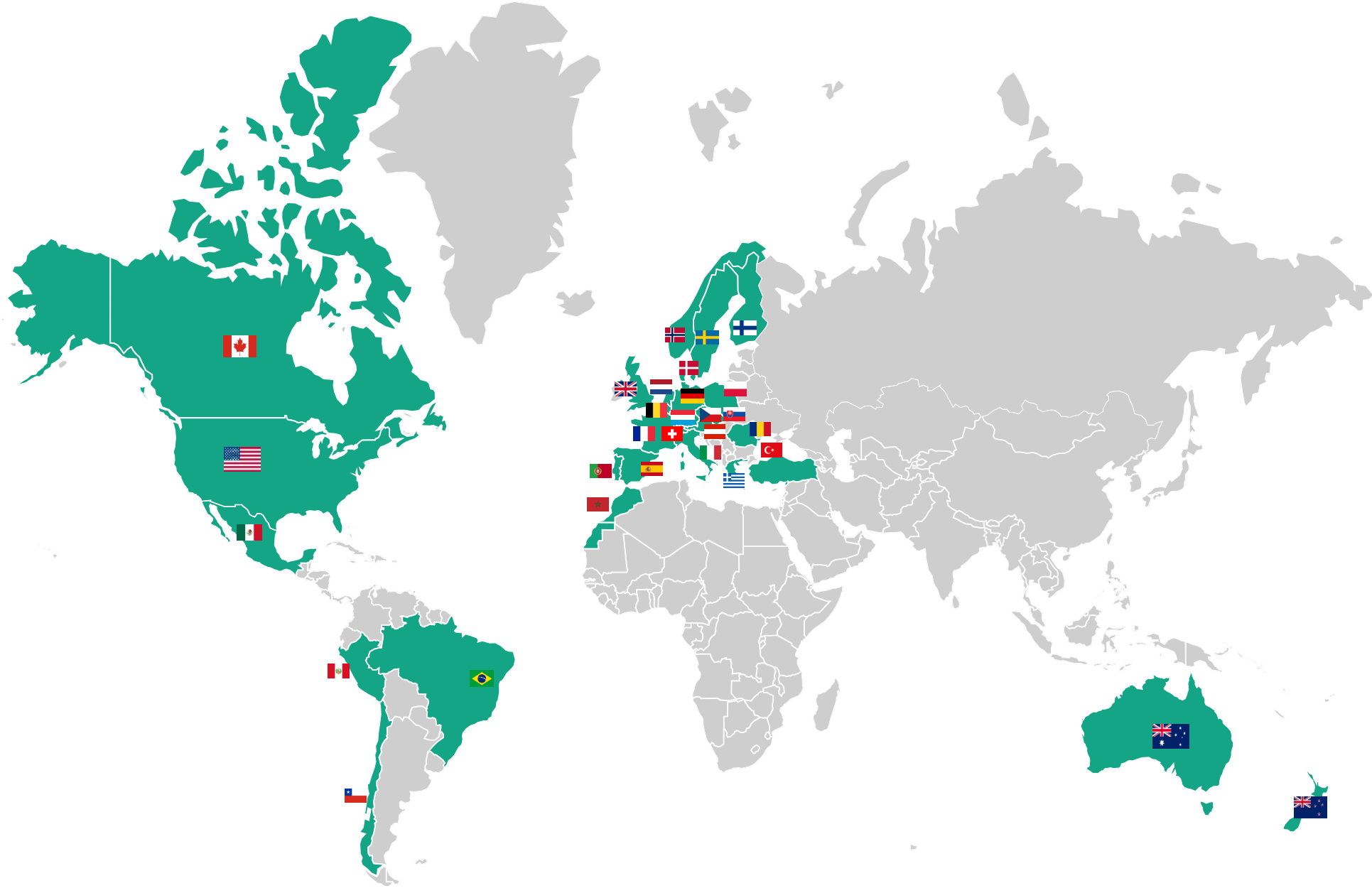
2

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

3

HOW DOES MOBILITY SOLUTION IMPACT CORPORATE MOBILITY?

SCOPE OF THE SURVEY: 30 COUNTRIES



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COMPANY SIZE SEGMENT DEFINITION

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

METHODOLOGY

DATA COLLECTION METHOD

CATI SYSTEM
(Computer Assisted Telephone Interviewing)
Recruitment by telephone

FIELDWORK PERIOD

AUG 21 → NOV 13

TARGET

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

QUOTAS

COMPANY SIZE & SECTOR

SAMPLE

5,854	Europe
1,650	Americas
1,101	Rest of the world (TR,MA,AU,NZ)
8,605	Interviews in total

DURATION OF INTERVIEW

26 minutes on average

READING NOTES ABOUT THE REPORT

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

↗ XX	Significantly higher than 2023 year
▲ XX	Significantly higher than 2022 year
	XX = score 2023 or 2022
↘ XX	Significantly lower than 2023 year
▼ XX	Significantly lower than 2022 year
	XX = score 2023 or 2022

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

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

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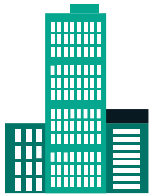
NUMBER OF INTERVIEWS CONDUCTED WORLDWIDE

Perimeter of the survey: companies owning at least 1 vehicle



Companies with less than 10 employees
2,849 INTERVIEWS

Companies with 10 to 99 employees
1,806 INTERVIEWS

Companies with 100 to 249/499/999 employees
2,286 INTERVIEWS

Companies with 250/500/1,000 employees and more
1,664 INTERVIEWS

1 to 99 employees
4,655 INTERVIEWS

100 employees and more
3,950 INTERVIEWS

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SAMPLE STRUCTURE

Company size & sector

In %

					TOTAL
Construction Building Construction General Contractors And Operative Builders / Heavy Construction Other Than Building Construction Contractors / Construction Special Trade Contractors	14	14	12	9	12
Industry Mining, oil & gas, Manufacturing (e.g. food, tobacco, textile, wood, furniture, printing, publishing, chemicals, fabricated metal products, electronic, machinery, etc…)	20	27	32	32	27
Services Finance / transportation / Hotels, Rooming Houses, Camps, And Other Lodging Places / Personal Services / Business Services / Automotive Repair, Services, And Parking / Motion Pictures / Amusement And Recreation Services / Health Services / Legal Services / Social Services / Museums, Art Galleries, And Botanical And Zoological Gardens / Membership Organizations / Engineering, Accounting, Research, Management, And Related Services / Private Households	39	35	34	38	37
Trade Building Materials, Hardware, Garden Supply, And Mobile Home Dealers / General Merchandise Stores Food Stores / Automotive Dealers And Gasoline Service Stations / Apparel And Accessory Stores / Home Furniture, Furnishings, And Equipment Stores / Eating And Drinking Places / Miscellaneous / Retail / Wholesale trade	27	24	23	22	24
Weight of each company size segment All countries	33	20	27	20	

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

2

EXECUTIVE SUMMARY

#1 GLOBALLY, MOST COMPANIES REMAIN CONFIDENT ABOUT THE FUTURE OF THEIR FLEETS

91% of companies anticipate that their fleet will either remain stable or experience growth over the next 3 years

- **91% of companies anticipate that their fleet will either remain stable or experience growth** over the next 3 years, a result that remains consistent with the 2023 findings. Persistent geopolitical, economic and automotive industry uncertainties do not seem to significantly impact business perspectives.

- **Business growth and development remains the main driver for fleet expansion (73%)**, with a continuing increase on all other motivations compared to 2023.
  - Other reasons are **HR-related needs (44%)** & proposing vehicles to employees who are not eligible for a company vehicle as a lever of company attractiveness (32%) – which reinforces the HR requirement for fleet increase for the third year in a row.

- **16% of companies have changed or are considering changing their mobility policy, with regards to the development of homeworking**. Among the companies that have changed or are considering changing their mobility policy, 16% are developing alternative mobility solutions

- In the context of long delivery times experienced in the last years, as well as the fleet challenges mentioned below, **the share of companies stating they have used/second-hand vehicles in their fleet is at 43% globally.**

- **Fleet managers appear under stronger pressure** this year, with all anticipated fleet challenges rising:
  - **Primarily focused on fleet electrification (**15% mentioning this as number 1 challenge, and for 35% in the top three) and **adaptation to restrictive public policies on ICE vehicles** (for 14% being number 1 challenge, and 34% in top 3)
  - **A significant rise of TCO-related concerns** (30% in top 3 challenges, an increase of 4 points versus 2023) **and responsible driving among employees** (29% in top 3 challenges, versus 21% in 2023).

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#2 FULL-SERVICE LEASING TO CONTINUE TO GROW ACROSS ALL COMPANY SIZES AND COUNTRIES

36% of companies are considering to introduce or further increase the use of full-service leasing in the next 3 years

- Globally, full-service leasing remains used as the main financing method by more than 1 out of 4 companies (26%), with considerable variations per country in terms of maturity. In Europe, the full service leasing is used by 29% of the companies interviewed.

- **36% of companies globally are considering to introduce or further increase the use of full-service leasing** in their financing and fleet management model in the next 3 years. **Both at global and European level** we can see a slight increase of this compared to 2023 results.

- The evolution has been steered in 2024 by an **increased consideration among mid-sized companies**:
  - **At global level, 37% of small-mid companies** (an increase from 32% in 2023) intend to introduce and increase the use of full-service leasing, a proportion that brings them to the same level as mid-large and large companies
  - Another interesting finding is that **in Europe we see the same increasing trend for all mid-size companies** (from 32% in 2023 to 36% in 2024 for small-mid companies and from 33% to 37% for mid-large ones), now also arriving at the same level as large companies.

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#3 DRIVEN BY CSR RELATED REASONS, FLEET ELECTRIFICATION MOMENTUM CONTINUES

70% companies have already implemented or are considering implementing at least one of the alternative fuel technologies* on their passenger cars fleet, within the next 3 years

- Across all countries and companies surveyed, **70 % of companies have already implemented or are considering implementing at least one of the alternative fuel technologies* on their passenger cars fleet,** within the next 3 year. This result is stable compared to last year's sharp increase (from 59% in 2022 to 70% in 2023/2024).

- For the already implemented technologies, **HEV and PHEV remain slightly ahead of BEVs for passenger cars**
  - **HEV is decreasing globally**, after sharp increases for all 3 technologies last year. (from 26% in 2023 to 24% in 2022).

- Electrified (PHEV, HEV and BEV) passenger cars should represent **35% of the vehicle mix in the foreseeable future at global level**, with a higher adoption rate observed in Europe where four out of ten cars are to be electrified in 3 years. This view is remarkably consistent across fleets of all sizes.

- **For LCVs, 31% of companies having already implemented or considering implementing** at least one of the alternative fuel technologies*, within the next three years.

- When it comes to **the reasons for electrification** of passenger cars :
  - They remain **primarily driven by environmental and sustainable policy reasons** such as lower environmental impact (38%), companies' CSR policy (27%), compliance with Low Emission Zones (24%) or anticipation of future restrictive policies (21%) – the last two being on the rise this year
  - Other reasons are: the need to reduce fuel expenses (32%), and also employees' requests (21%).

- A new question in 2024, shows that **22% of companies are eligible for ESG public regulatory reporting to date** and an additional 40% will be in the next 2 years.
  - **4 out of 10 companies consider employee mobility** (fleet, commuting, travel) **of high importance** in the overall ESG reporting approach, while 49% place it as of medium importance.

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The Alternative Fuel Technologies* considered in the Barometer are (1) For Passenger Cars - hybrid vehicles (HEVs), plug-in hybrids (PHEVs) and battery electric vehicles (BEVs) and (2) For LCVs - battery electric vehicles (BEVs) and Hydrogen Fuel Cell;

#4 THE NUMBER OF BEVS ARE EXPECTED TO CONTINUE TO GROW, WITH CHALLENGES ON CHARGING, COST AND RANGE OF MODELS REMAINING

36% of companies have already implemented or are considering implementing BEVs on their passenger cars fleet, within the next 3 years

- 36 % of companies have already implemented or are considering **implementing BEVs on their passenger cars fleet,** within the next three years. The implementation rate today is at 20%.
  - This figure (36%) is **at the same level as PHEVs** and only slightly lower than HEVs, at 38%.
  - **In Europe, this is reaching 42%, which is at a similar level with the other technologies** (43% PHEVs, 42% HEV).

- An interesting fact is that **both current adoption and future consideration for BEVs has shown increases since 2022 both globally and in Europe**
  - On the other side, **both PHEVs and HEVs saw a big increase between 2022-2023, but remain at the same level or even decrease between 2023-2024**.

- **Globally, fleet managers estimate 17% of their passenger cars fleet will be BEV,** when asked about **their fleet composition in 3 years from now**. For Europe only, the estimation is at 20%. This shows that the fleet managers remain cautions with regards to the expectations of BEV adoption at a large scales in their fleet.

- 25 % of companies have already implemented or are considering **implementing BEVs on their LCVs fleet,** within the next three years. The implementation rate today is at 10%, an increase of 3 points compared to 2022.
  - According to the respondents, 10% of the LCVs fleets in 2027 are expected to be BEVs at global level (13% in Europe)

- The **lack of charging infrastructure and higher purchase prices are seen as the barriers** for companies not considering BEV to date.
  - The lack of charging points is mentioned by 70% of the respondents, with the lack of public charging points cited by 35%, then at the company premises by 31% and at employees' home by 29%.

- At the same time, **plans to install charging points at companies' premises remain stable this year** (30%).
  - In addition, company subsidies on home installations for employees are on the rise (from 16% in 2023 to 20% in 2024)

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The Alternative Fuel Technologies* **considered in the Barometer are (1) For Passenger Cars - hybrid vehicles (HEVs), plug-in hybrids (PHEVs) and battery electric vehicles (BEVs) and (2) For LCVs - battery electric vehicles (BEVs) and Hydrogen Fuel Cell;

#5 CORPORATE MOBILITY SOLUTIONS ARE INCREASINGLY ADOPTED TO COMPLIMENT COMPANY CARS, SUSTAINED BY INCREASED HR-RELATED NEEDS

75% companies out have already implemented at least one mobility solution*

- **Globally, 75% companies have already implemented at least one mobility solution* ,** an increase of 4 points compared to 2023 . This year the positive trend is mainly driven by mid-size companies, who are now on par with larger companies.

- To note **that only respondents aware of mobility solutions were interviewed**, representing 72**% of the overall study scope**, and when it came to **the person who decides on mobility solutions this remains the CEO** / Managing director (33%), a big distance ahead of: fleet director / manager (13%), Procurement director (12%) or HR Director (9%) – the results showing that Mobility solutions implementation is still a strategic decision process with potential to develop in the future.

- With regards to the implementation, public transport partial expenses remains the most widespread (20%).
  - if we look at **mobility policy** – 17% of the companies have already implemented a "car or cash" allowance, 15% a mobility budget and 13% private lease or salary sacrifice

  - in terms of **mobility solutions**, the top 3 are: ride-sharing (19%), bike sharing / leasing (16%) and short or mid-term rental (17%), with bike sharing/leasing showing the biggest potential for grow (29% of companies already using or considering implementing in the next 3 years, an increase of 2 points compared to 2023)

- While the reasons for implementing mobility policies are on the rise for all levels, showing a clear interest from companies to develop them even further, a significant change this year is that the leading reason globally is linked to HR related needs like talent recruitment and retention of employees (41%), closely followed by CSR Policies (38%).

- Just like previous years, **these solutions are seen more as an add-on to the company fleet,** the likelihood to give up all or part of the fleet for mobility solutions remaining pretty low.

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*The list of mobility solutions used in the Barometer is: Corporate Car Sharing, Ride Sharing, Bike (or other two wheels) sharing / Bike (or other two wheels) leasing), Public transport, Mobility Budget, An app provided by the company to book mobility solutions, Private Lease or Salary Sacrifice, A short or Mid Term rental vehicle, Car or Cash Allowance

#6 THE CONNECTED CARS PARADOX: A HIGH LEVELS OF CONNECTED CARS GLOBALLY, STRONG INTENTIONS YET LIMITED USE OF TELEMATICS DATA

40% of companies have adopted a telematics tool for their passenger cars or LCV, but only 16% of companies equipped claim to be using the data

- A high penetration of connected vehicles among fleets, with **4 in 10 companies having adopted a telematics tool for their passenger cars or LCVs** (with a slightly higher adoption for LCVs), but this average still hides **strong discrepancies across markets**.

- A new question added this year shows that **61% of the companies that have connected vehicles are already using or consider using the data** coming from the vehicle box thanks to a telematics platform in the next 3 years, a result that is remarkably consistent for both size type and across countries.
  - Today , we can see a big gap between equipment and data usage: **as only 16% of companies equipped claim to be using the data** coming through a telematics platform.

- The main usages of telematics data are focused on **vehicle security & geolocation (38%) and drivers' safety / behavior (31%),** but also **operational efficiency (29%)**.
  - Reduction of fleet costs (23%) seems more secondary, despite a persistent inflationary context and 15% of the companies use the data to support lowering their environmental impact.

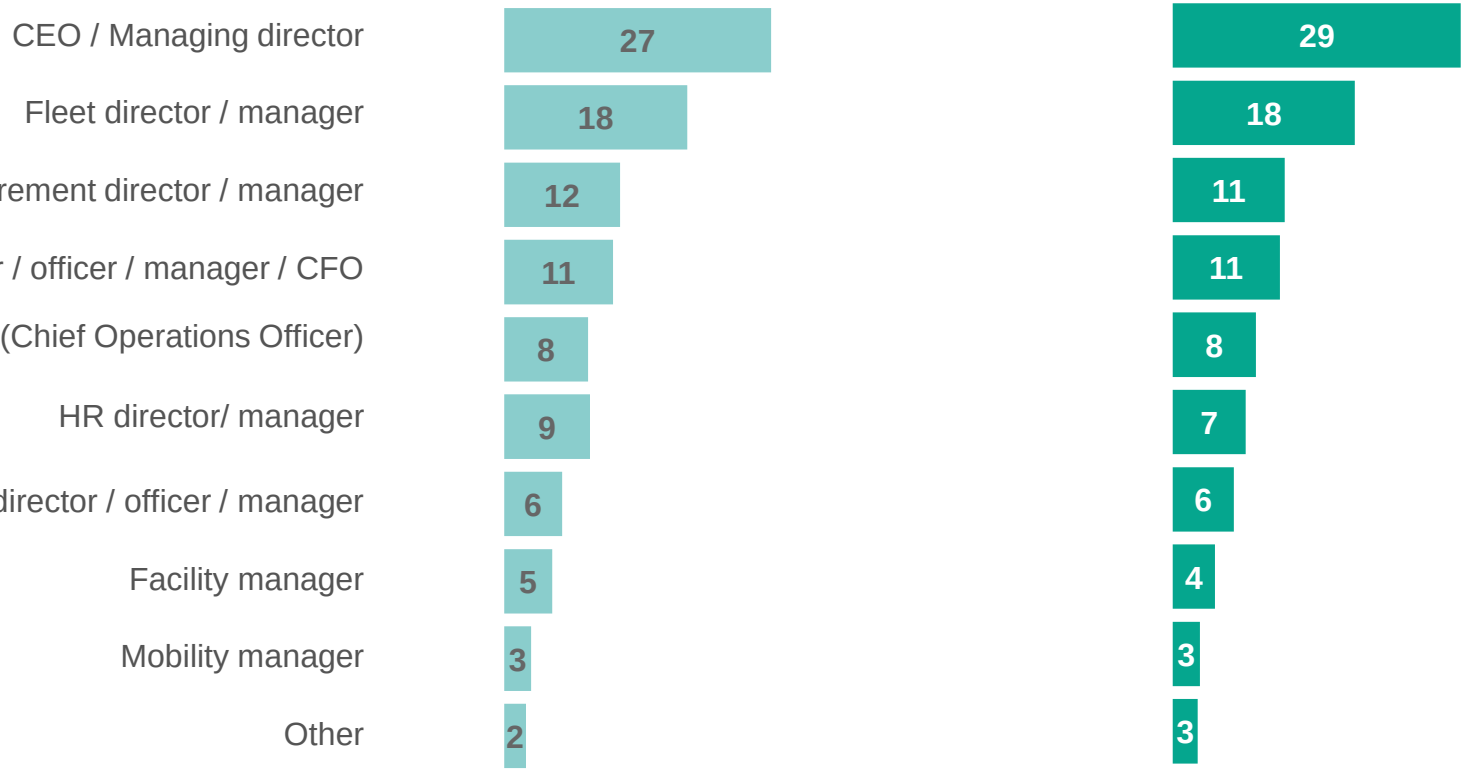
3

WHAT ARE THE MAIN **CHARACTERISTICS OF THE FLEETS?**

RESPONDENTS POSITION WITHIN THE COMPANY

In %

Passenger cars + LCVs

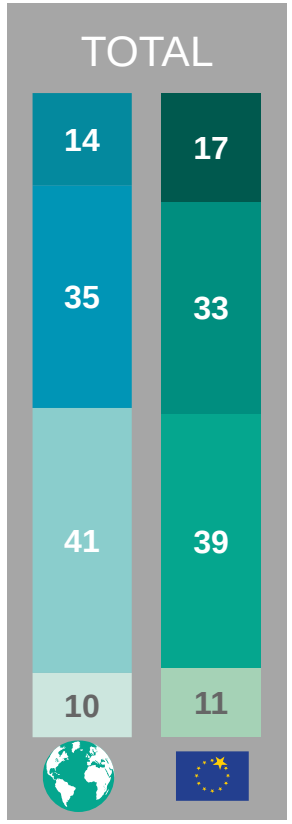


Could you please specify your exact position in the company?
Basis: companies with corporate vehicles = 100%

NUMBER OF VEHICLES IN FLEET

In %

Passenger cars + LCVs



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

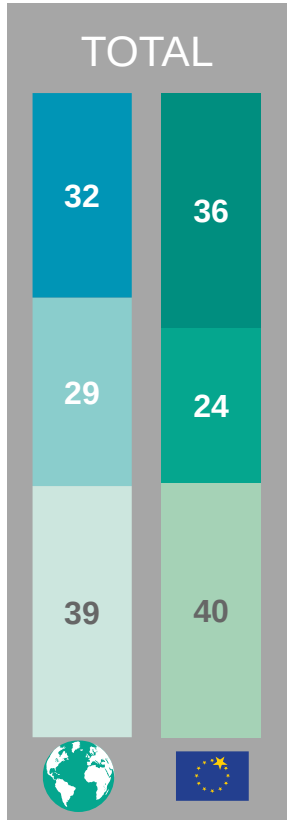
Can you please tell us the total number of vehicles of less than 3.5 tons in your fleet?
Basis: companies with corporate vehicles = 100%

NUMBER OF PASSENGER CARS IN FLEET

In %

Passenger cars

1000 vehicles and more
100 to 999 vehicles
10 to 99 vehicles
1 to 9 vehicles
No passenger car



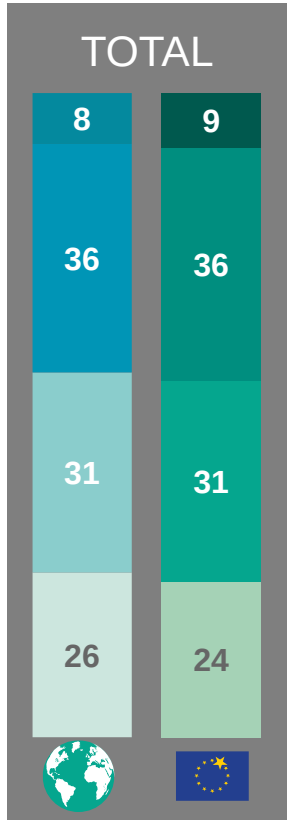
And can you please tell us the total number of cars in your fleet?
Basis: companies with passenger cars

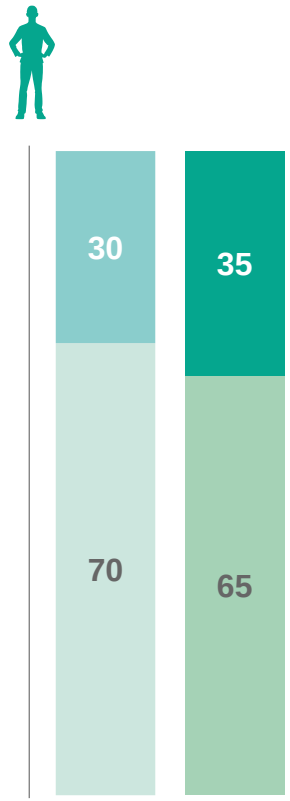
NUMBER OF LCVS IN FLEET

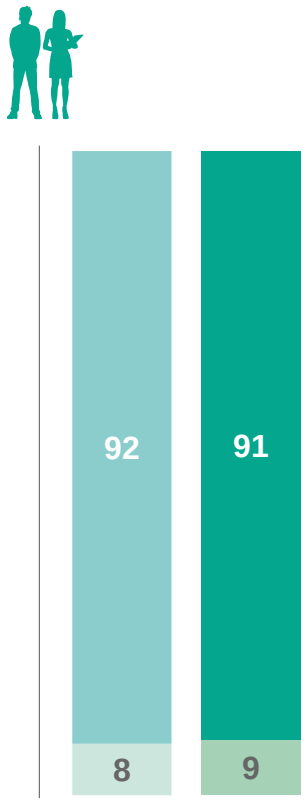
In %

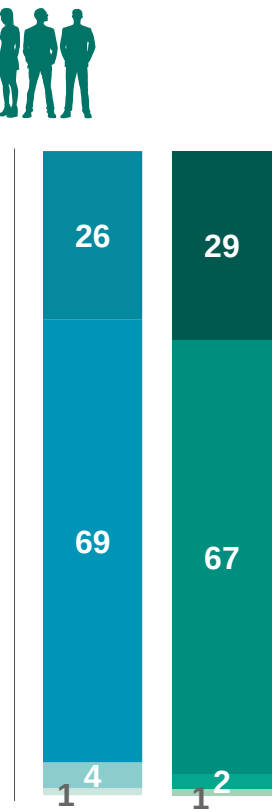
LCVs

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









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

VEHICLES POSSESSION LENGTH

INSIGHT: Vehicles possession length tends to slightly decreases this year compared to last year and is consistent across all companies' sizes

Passenger cars + LCVs

AVERAGE IN YEARS

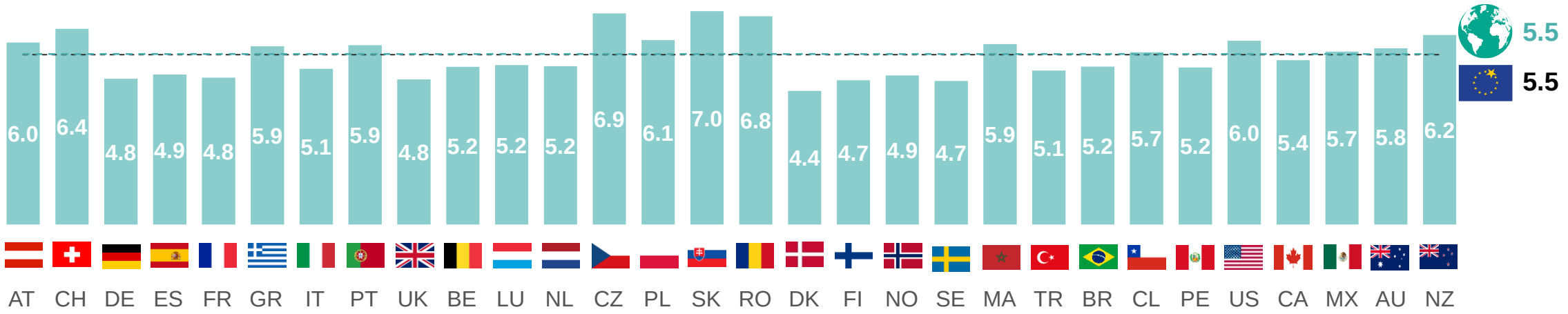
	TOTAL	1 to 5 employees	6 to 19 employees	20 to 99 employees	100 employees and more
Worldwide	5.5 (5.6)	5.5	5.6	5.5	5.6
Europe	5.5	5.4	5.6	5.5	5.6

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

VEHICLES POSSESSION LENGTH

Passenger cars + LCVs

AVERAGE IN YEARS



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

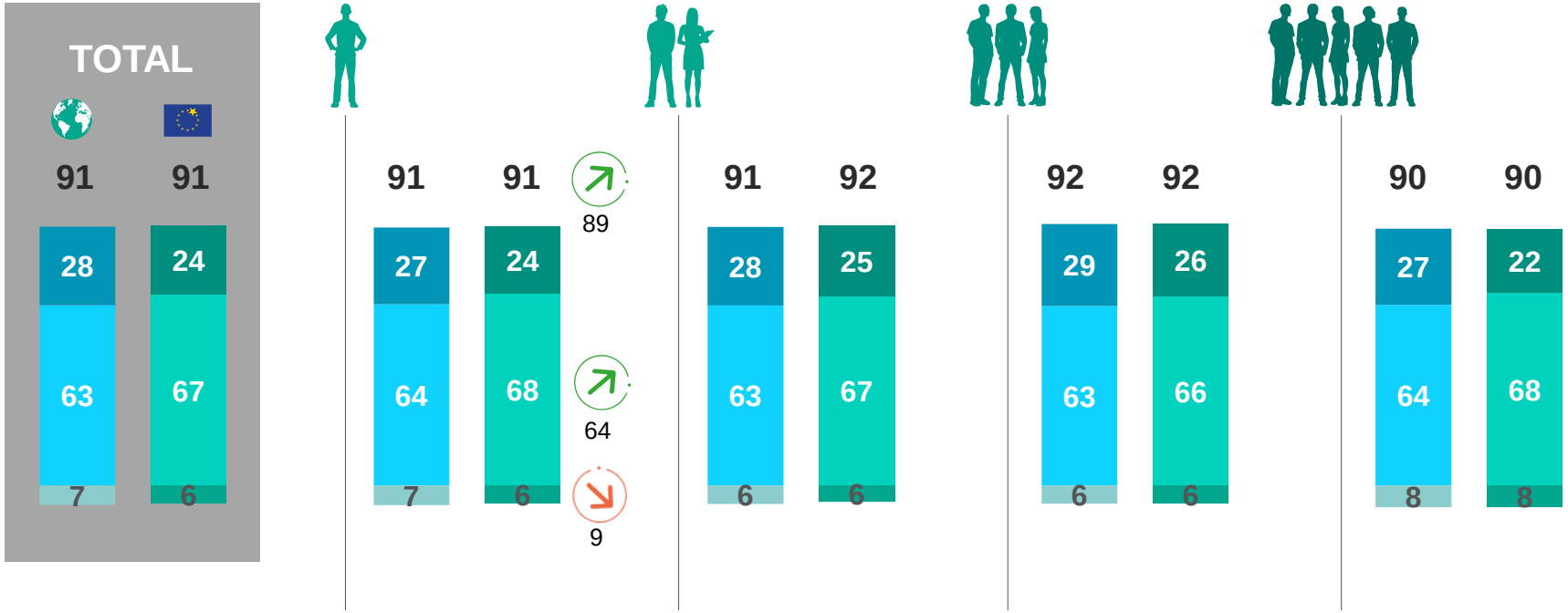
FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

Overall, 91% of the companies declare that in the next 3 years their company fleet will remain stable or increase.

In %

Passenger cars + LCVs



BALANCE in pts (INCREASE ⊖ DECREASE)

2024	+21	+18	+20	+17	+21	+19	+23	+20	+19	+15
2023	+20	+16	+19	+16	+22	+16	+19	+17	+21	+16
2022	+20	+18	+21	+19	+21	+17	+19	+17	+17	+17

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

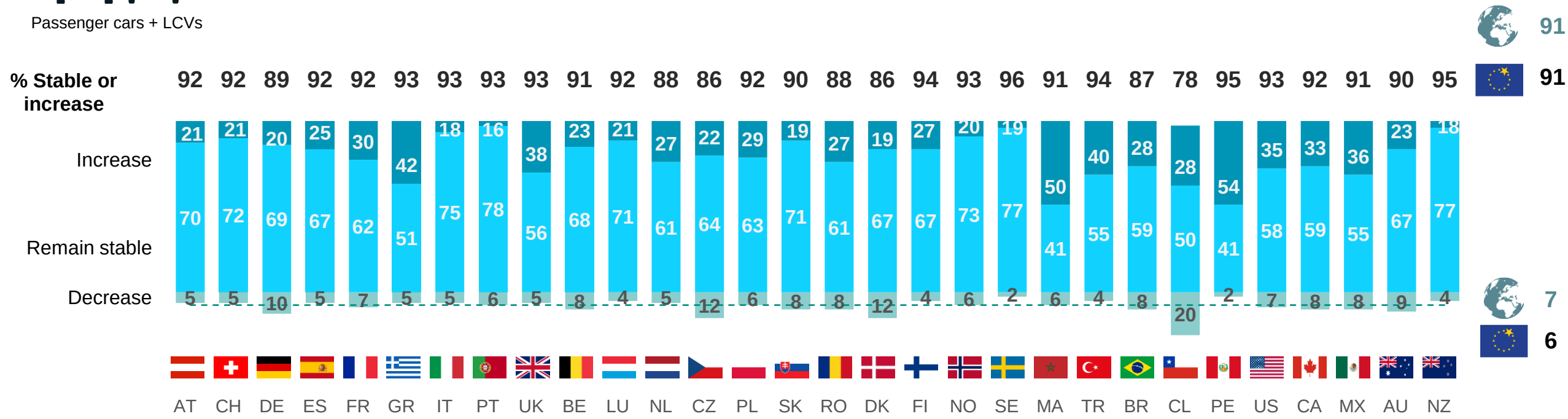
FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Austria, 92% of the companies declare that in the next 3 years their company fleet will remain stable or increase.

In %

Passenger cars + LCVs



	AT	CH	DE	ES	FR	GR	IT	PT	UK	BE	LU	NL	CZ	PL	SK	RO	DK	FI	NO	SE	MA	TR	BR	CL	PE	US	CA	MX	AU	NZ		
2024	+17	+15	+10	+20	+22	+37	+13	+10	+33	+15	+17	+22	+10	+23	+11	+20	+7	+24	+14	+16	+44	+36	+21	+9	+52	+28	+25	+28	+15	+13	+21	+18
2023	+17	+11	+13	+14	+21	+34	+19	+9	+24	+14	+15	+15	+9	+24	+7	+22	+8	+22	+12	+12	+46	+34	+21	+26	+44	+23	+24	+30	+11	+16	+20	+16
2022	+18	+13	+18	+16	+24	+24	+18	+22	+27	+13	+19	+23	+7	+22	+13	+23	+10	+21	+11	+14	+33	+14	+19	+24	+49	-	-	-	-	-	+20	+18

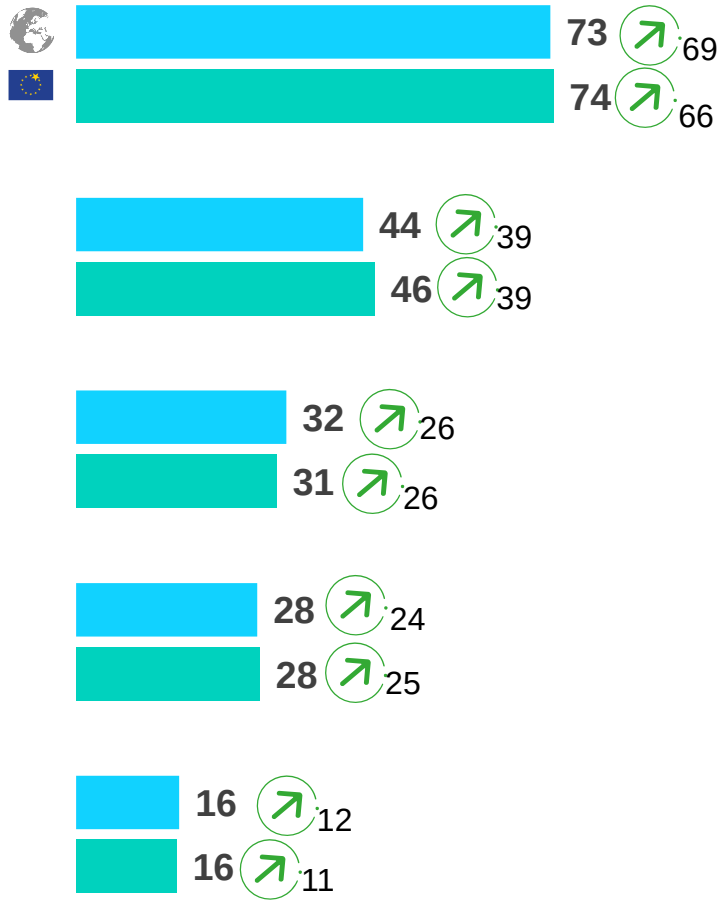
In the next three years, do you think that the total number of vehicles in your company fleet will increase, decrease or remain the same?
Basis: companies with corporate vehicles = 100%

REASON FOR FUTURE FLEET INCREASE

INSIGHT: Among the 28% of companies expecting an increase of their fleet, fleet growth anticipations rely primarily on business development, but we see also an increase on HR related needs and mobility as a lever of company attractiveness.

In %

Passenger cars + LCVs



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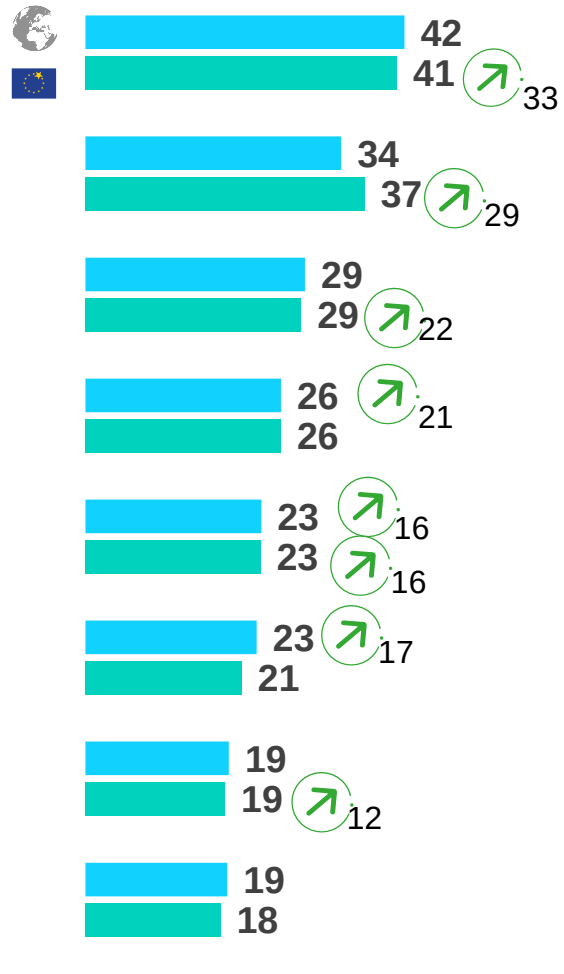
Why do you think the total number of vehicles in your company fleet will increase?
Basis: companies expecting an increase of the fleet

REASON FOR FUTURE FLEET DECREASE

INSIGHT: Among the 7% of companies expecting a decrease of their fleet, no single reason really stands out : fleet decrease anticipations are primarily linked to declining business but also to other reasons, with an increase of reasons on all levels

In %

Passenger cars + LCVs



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

SECOND-HAND VEHICLES

HOW TO READ THE RESULTS ?

Overall, 83% of the companies are already using or consider to have used/second-hand vehicles in the next 3 years. 43% of the companies are currently having some.

In %

Passenger cars + LCVs

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

ALREADY USING

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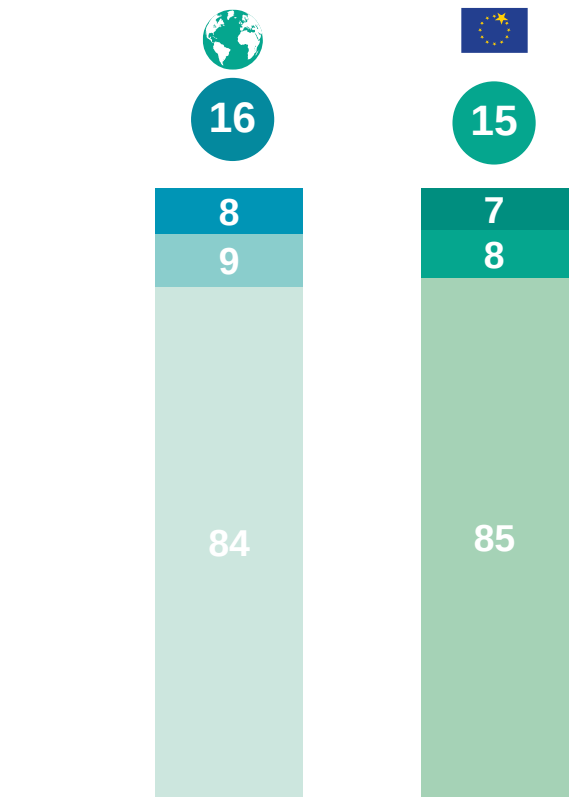
New question added in 2024

Do you have used/second-hand vehicles in your fleet or do you consider having some in the next three years?
Basis: companies with corporate vehicles = 100%

MOBILITY POLICY ADAPTATION LINK TO HOMEWORKING

In %

Passenger cars + LCVs



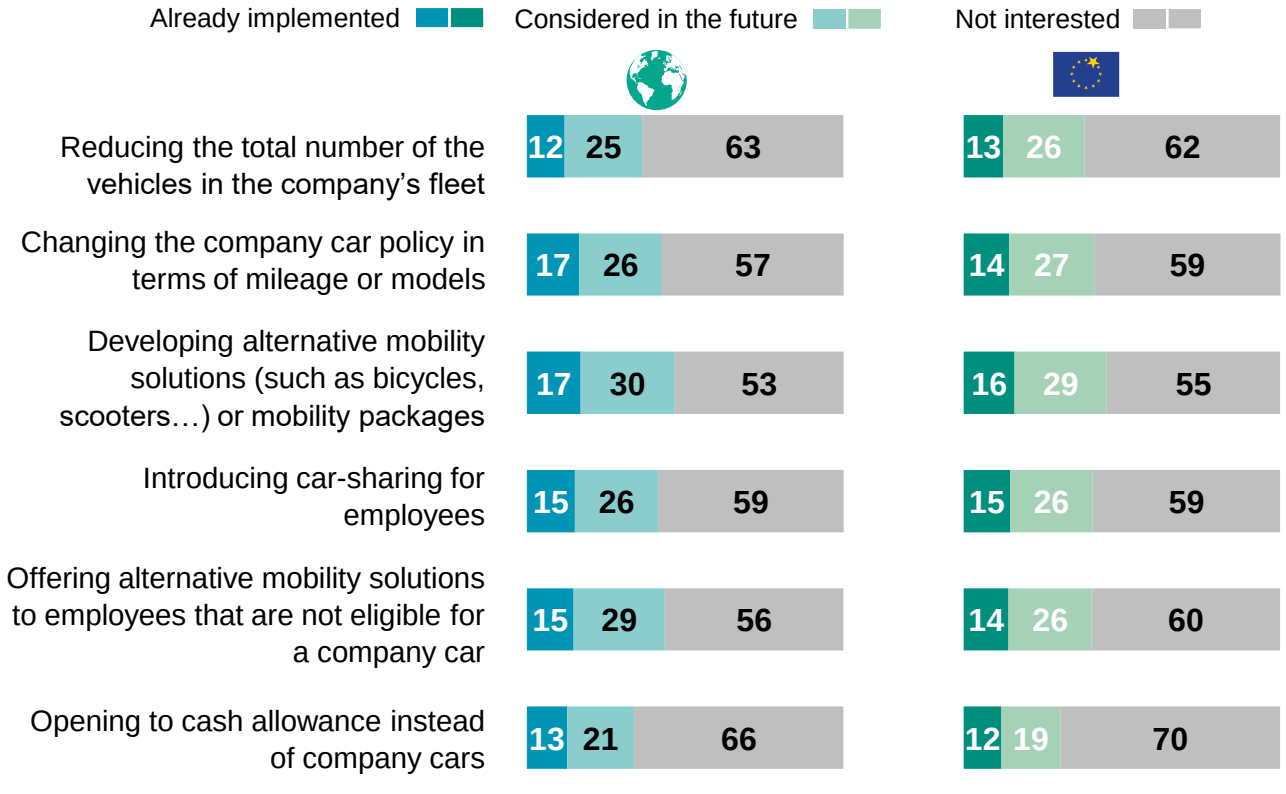
NET CHANGED THE POLICY OR CONSIDER CHANGING

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

Basis: companies with corporate vehicles = 100%

HOW TO READ THE RESULTS ?

In Europe, among the companies that changed or consider changing their mobility policy, 16% are developing alternative mobility solutions



Question asked to respondents that are aware of mobility solutions

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

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MOST IMPORTANT CHALLENGES EXPECTED

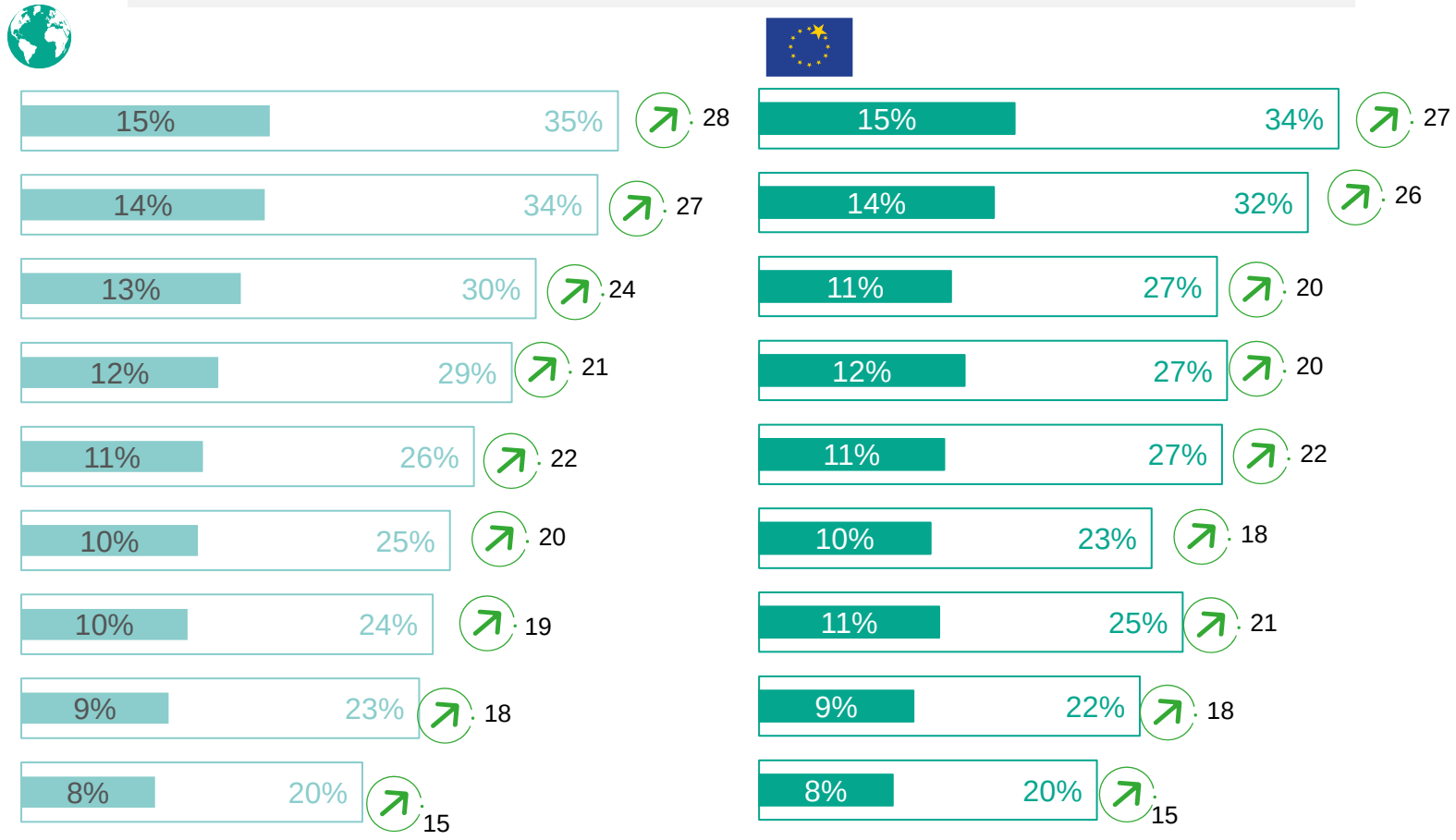
HOW TO READ THE RESULTS

At global level, implementing alternative fuel technologies is top 1 challenge for 15% of the companies, and within top 3 challenges for 35%.

INSIGHT: At Global and European Level all challenges see an increase, with notable increase on the concerns related to TCO and introducing more responsible driving among employees

In %

Passenger cars + LCVs



Arval Mobility Observatory

Nb 1 challenge

Top 3 challenges

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

MOST IMPORTANT CHALLENGES EXPECTED

In %

Passenger cars + LCVs

	AT	CH	DE	ES	FR	GR	IT	PT	UK	BE	LU	NL	CZ	PL	SK	RO	DK	FI	NO	SE	MA	TR	BR	CL	PE	US	CA	MX	AU	NZ
Implementing alternative fuel technologies	**16**	**16**	**18**	**16**	**17**	13	10	14	**19**	**16**	14	**20**	**13**	**17**	11	14	14	13	12	**16**	**17**	**18**	10	14	13	13	11	12	8	21
Adapting to restrictive public policies on petrol and diesel vehicles	15	12	**18**	15	14	**16**	**20**	**16**	9	14	12	16	**13**	13	10	11	**15**	**15**	11	10	13	14	15	**21**	**17**	10	12	16	16	19
Inducing more responsible driving among employees	10	13	14	13	15	7	12	9	10	15	14	11	**13**	13	10	**16**	11	10	**13**	15	11	10	**19**	13	15	12	9	9	4	3
Managing longer vehicles' delivery time	9	12	6	10	8	14	12	11	13	9	10	10	10	9	12	11	13	12	11	15	11	13	5	12	14	**14**	**19**	6	6	2
Mitigating the increase of total cost of ownership of the vehicles	10	13	8	9	12	14	9	10	11	5	9	10	12	15	**20**	13	9	11	12	11	16	15	12	12	9	12	18	16	**25**	**26**
Adapting to the expansion of low emission zones in urban areas	9	11	9	7	11	9	9	15	17	**16**	6	9	10	10	10	11	10	10	**13**	9	6	8	0	9	10	10	3	6	20	8
Adjusting to new ways of working	13	11	9	12	11	10	9	8	10	10	**18**	10	12	7	7	7	12	11	8	7	11	11	16	4	6	9	12	**21**	9	11
Adapting to evolutions of car selling models	9	7	8	12	5	10	13	9	5	6	8	9	8	7	11	10	8	10	**13**	13	5	7	11	6	6	11	9	9	9	5
Implementing other mobility solutions	8	5	11	8	7	7	6	9	7	10	8	6	8	9	9	9	9	7	8	6	10	5	11	9	10	9	9	6	4	4

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***No 1 Challenge**

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

4

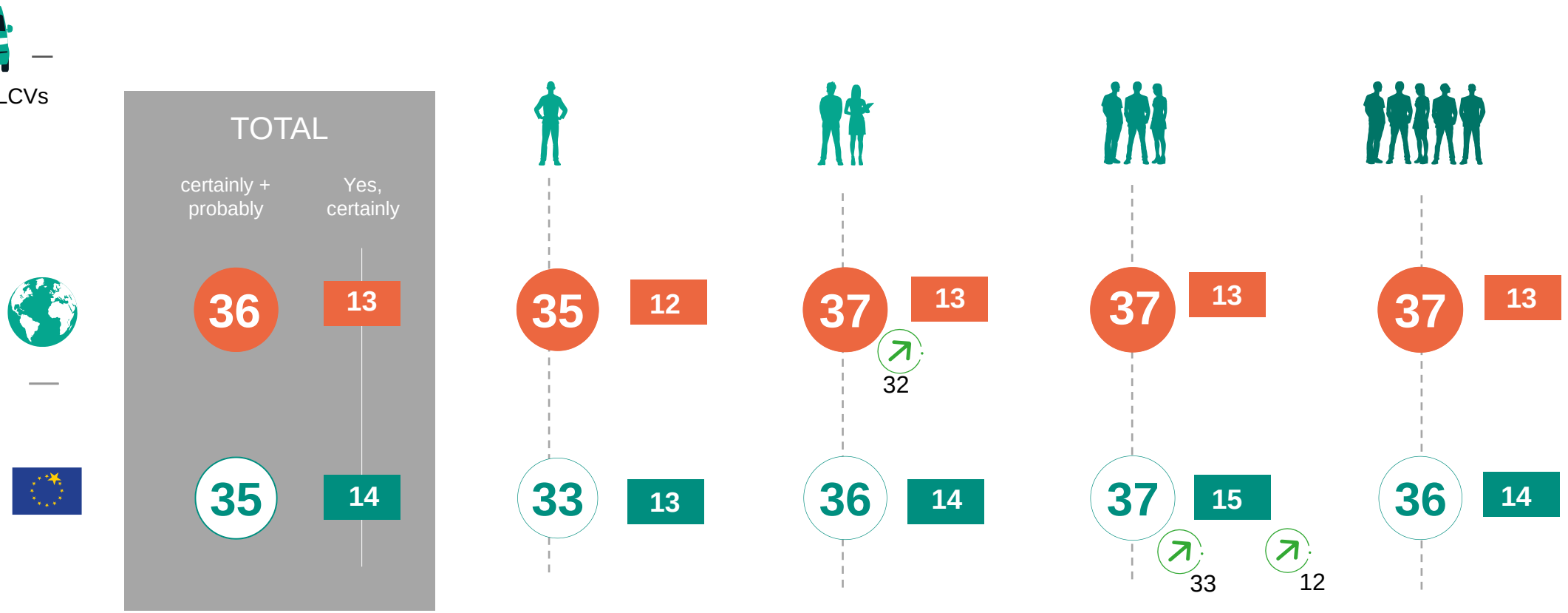
HOW ARE COMPANIES FINANCING THEIR FLEET?

INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATING LEASING

Share of companies intending to introduce or increase the use of operating leasing

In %

Passenger cars + LCVs



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

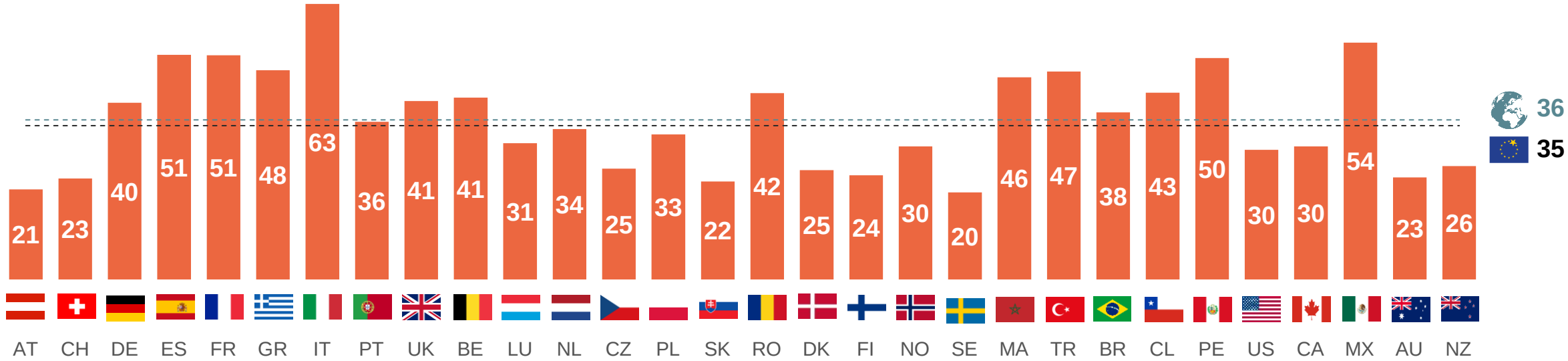
INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATING LEASING

Share of companies intending to introduce or increase the use of operating leasing

Certainly + probably

In %

Passenger cars + LCVs



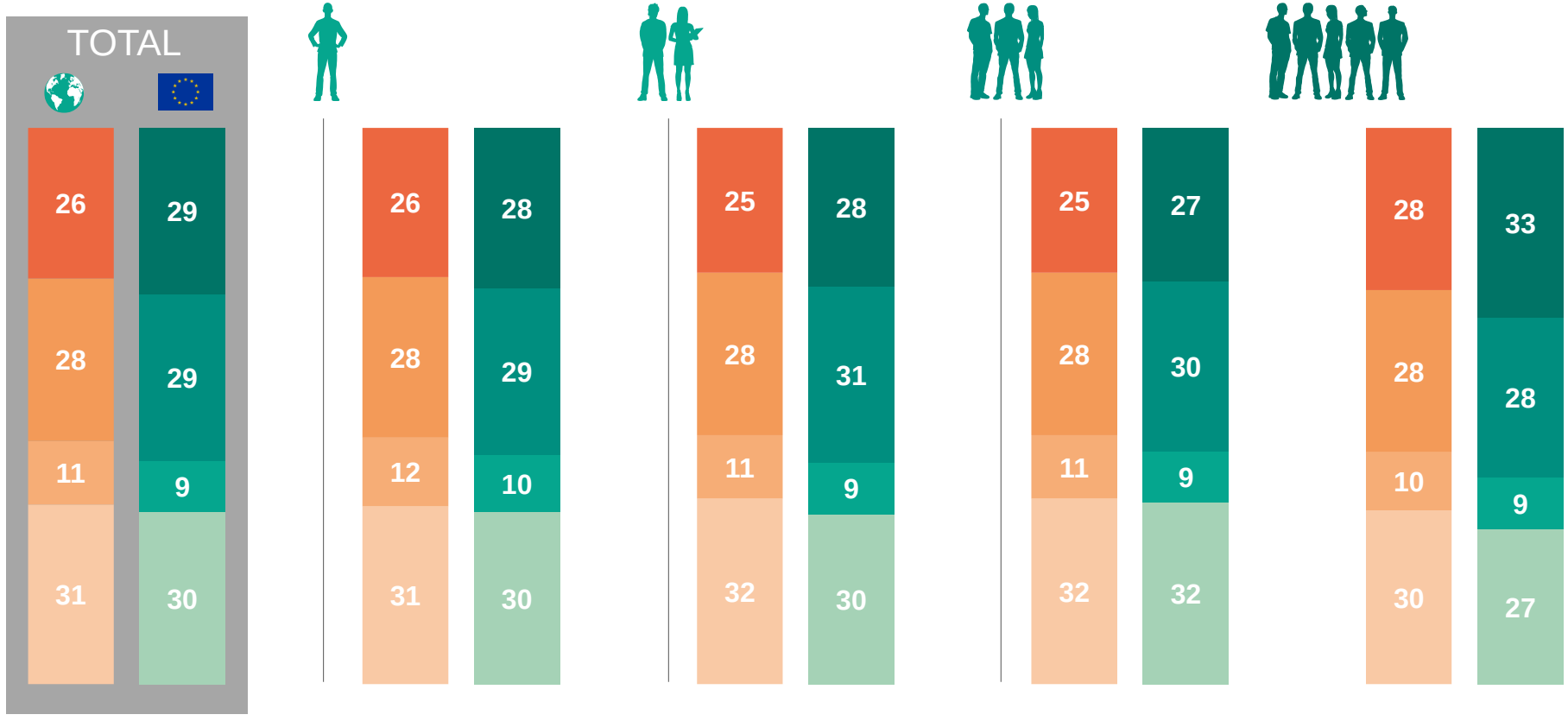
In the next three years do you intend to introduce or increase use of Operating Lease to finance your corporate fleet?
In the next three years do you intend to introduce or increase Renting in your corporate fleet to benefit from the use of the vehicles, rather than to finance or buy vehicles for your company?
Basis: companies with corporate vehicles = 100%

MAIN FLEET FINANCING METHOD

INSIGHT: 26 % of companies have operating leasing as their main financing method used to finance their fleets today, at global level. In Europe, 29% of them use operating leasing as their main financing method.

In %

Passenger cars + LCVs



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

5

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

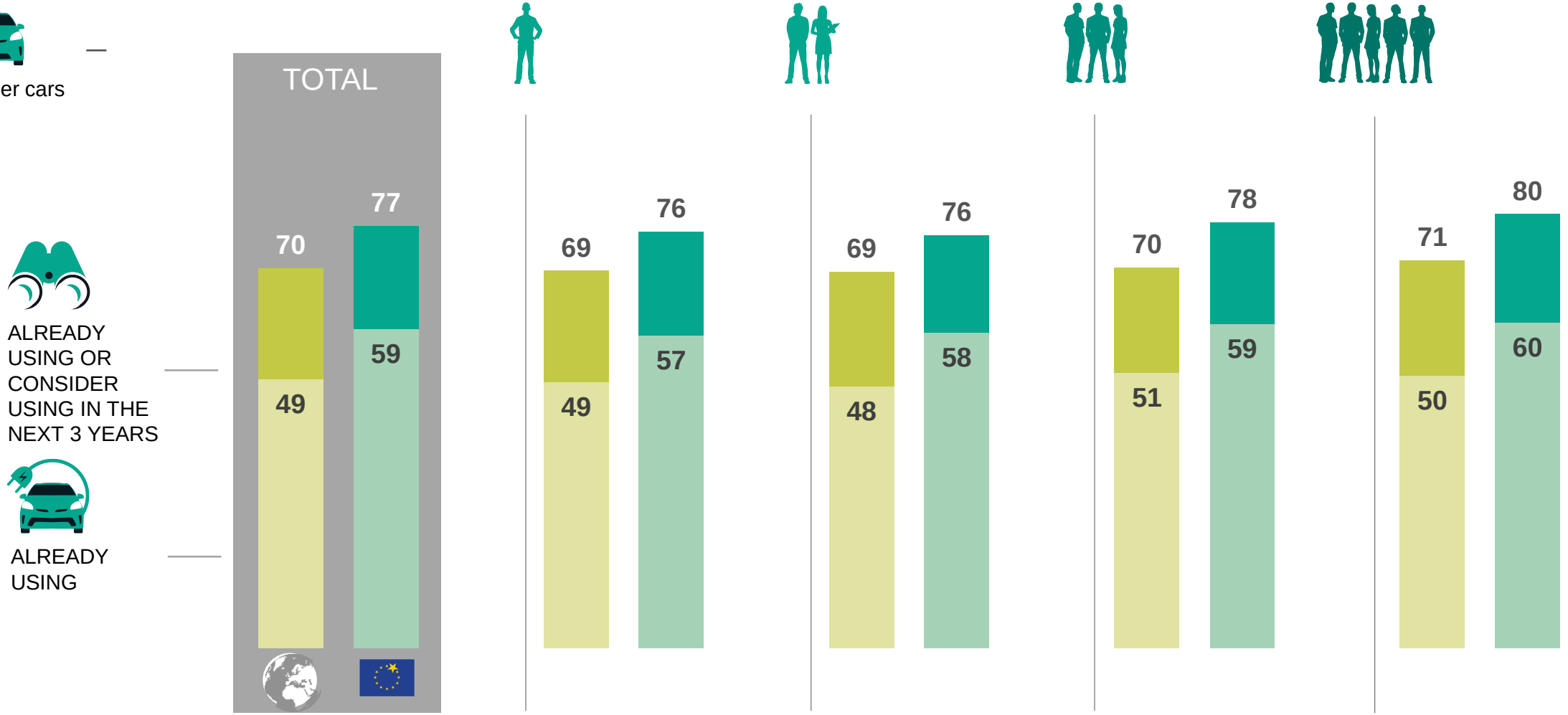
CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

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

INSIGHT: 70 % of companies have already implemented or are considering implementing at least one alternative fuel technology on their passenger cars fleet within the next three years, a stable result compared to 2023 figures

In %

Passenger cars



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

CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

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

HOW TO READ THE RESULTS ?

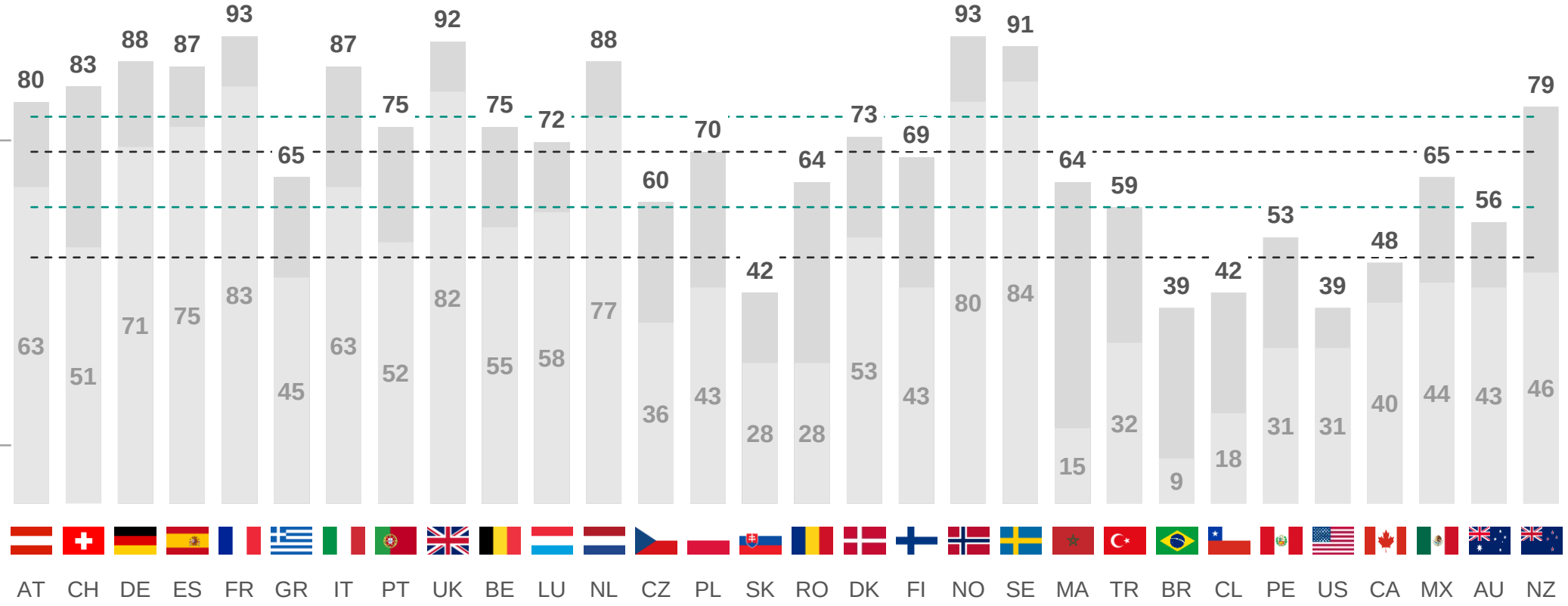
In Austria, 80% of the companies are already using or consider to implement at least one alternative technology in the next 3 years. 63% of the companies is currently using at least one.

In %

Passenger cars

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

ALREADY USING



77
70

59
49

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

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY*

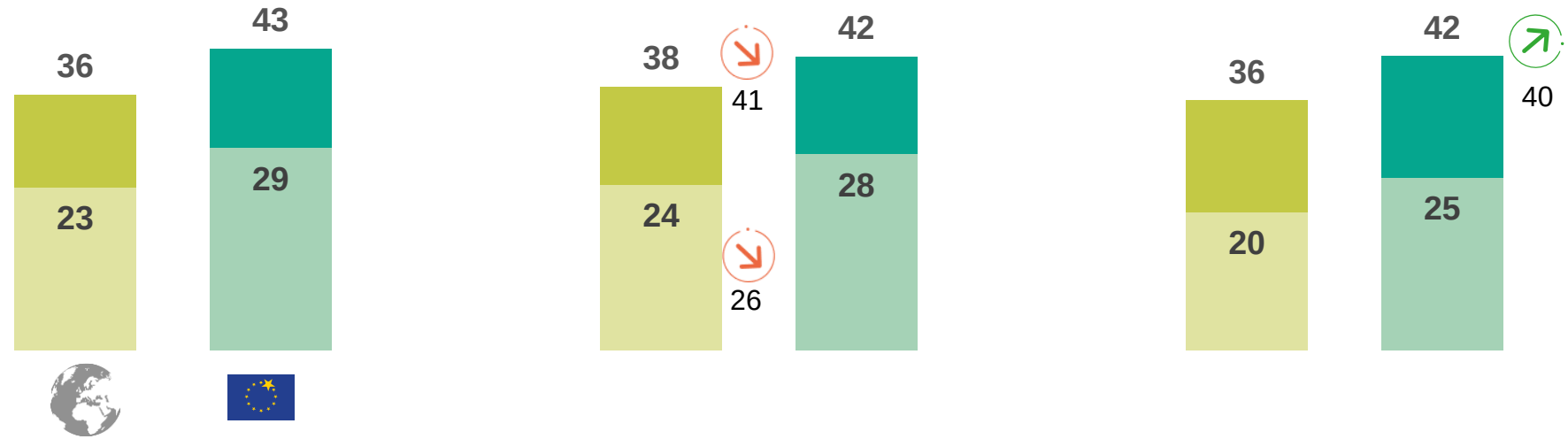
Passenger car fleet

In %

Passenger cars

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

ALREADY USING



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

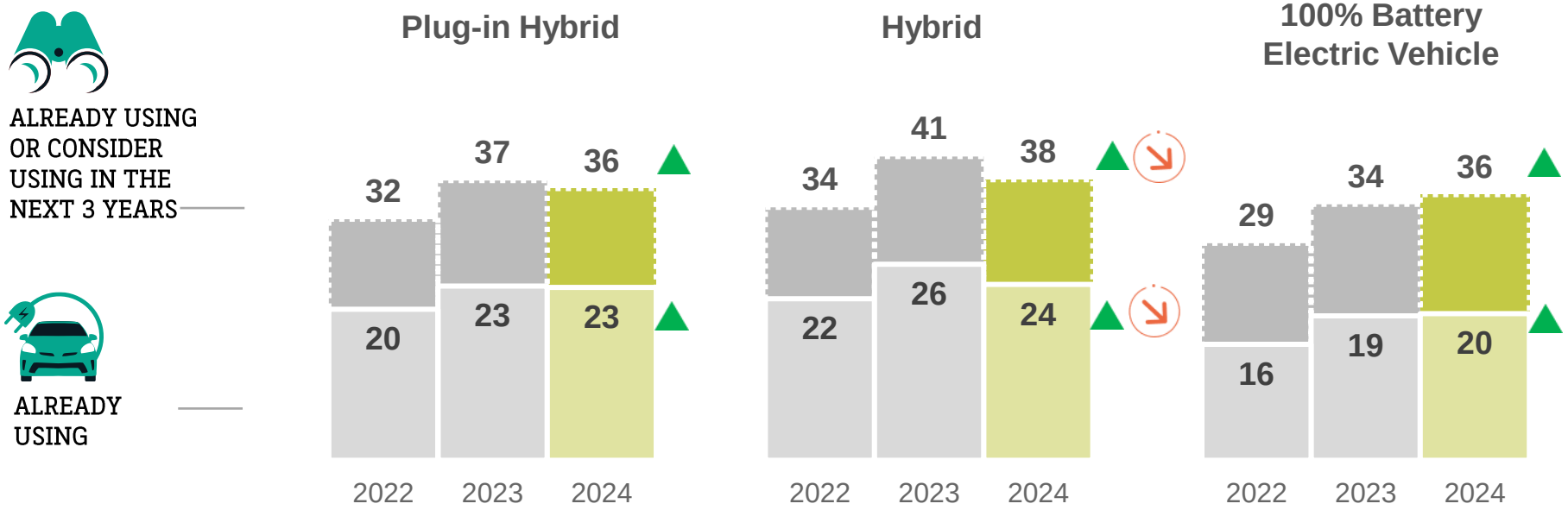
ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years

INSIGHT: Both PHEV and HEV show stable or even slight decrease versus the previous year, in term of adoption and future consideration. BEV continues the increasing trend, though at a smaller pace in 2024 compared to 2023.

In %

Passenger cars



	Plug-in Hybrid			Hybrid			100% Battery Electric Vehicle		
	2022	2023	2024	2022	2023	2024	2022	2023	2024
ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS	37	44	43 ▲	38	44	42 ▲	34	40	42 ▲ ↗
ALREADY USING	24	29	29 ▲	26	29	28	19	24	25 ▲

↗ XX Significantly higher than 2023 year

▲ XX Significantly higher than 2022 year

XX = score 2023 or 2022

↘ XX Significantly lower than 2023 year

▼ XX Significantly lower than 2022 year

XX = score 2023 or 2022

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

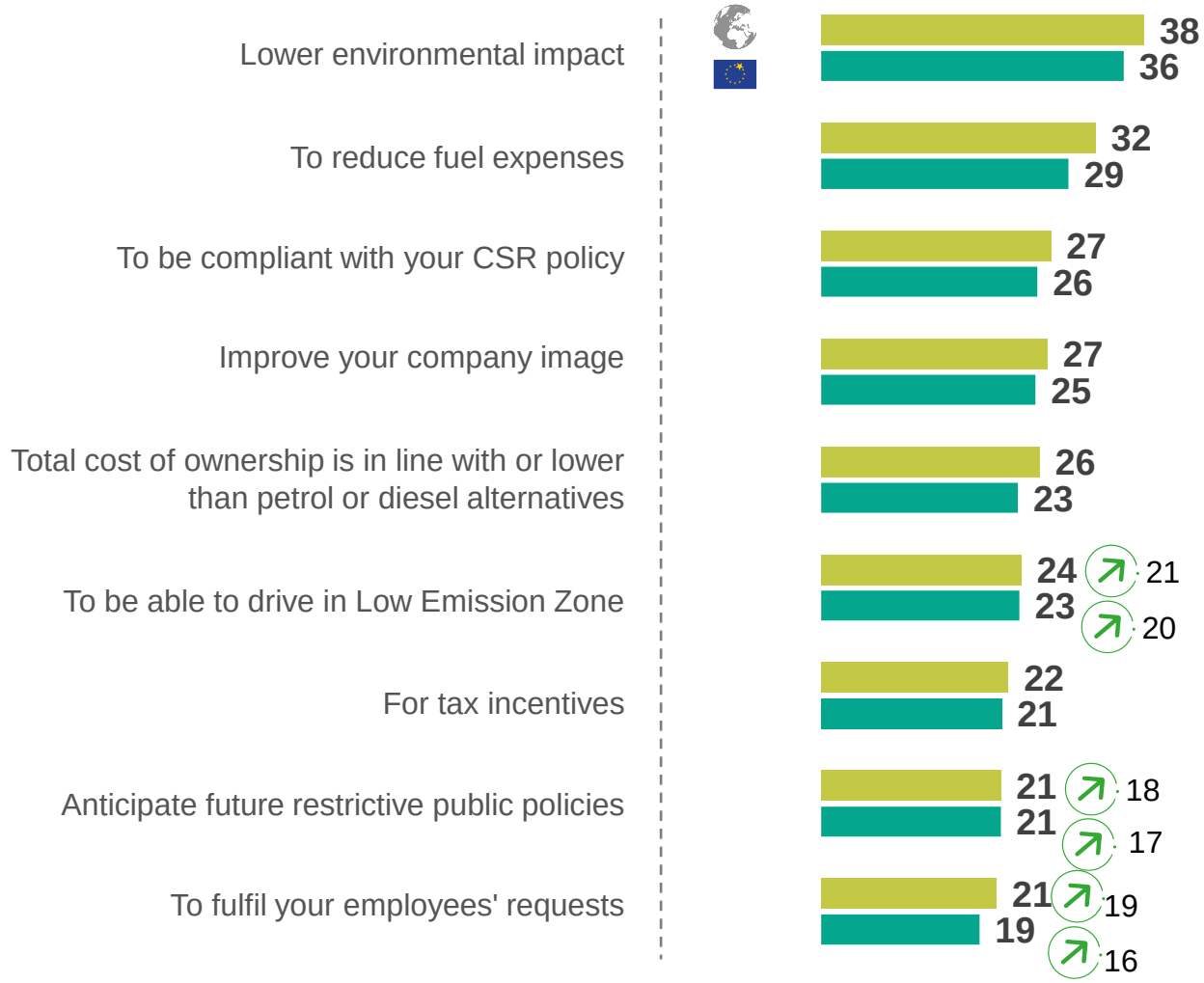
REASONS FOR IMPLEMENTING OR CONSIDERING ALTERNATIVE FUEL TECHNOLOGIES

Passenger car fleet

INSIGHT: Among companies having implemented or considering implementing alternative fuel technologies, the shift to them for Passenger Cars is primarily driven by their lower environmental impact and fuel expenses, but also by CSR companies' policy. There is a significant increase linked to anticipation of future restrictive policies and LEZs.

In %

Passenger cars



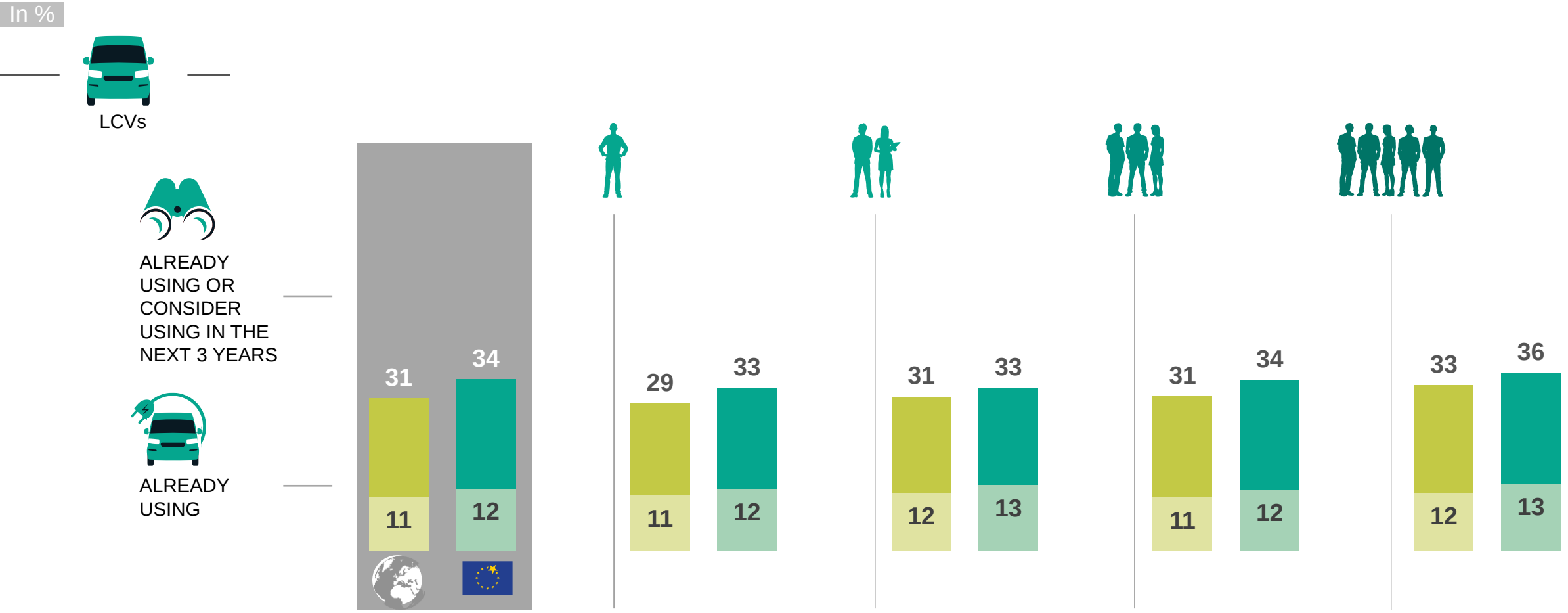
Why have you already implemented or why do you consider implementing alternative fuel technologies?
Basis: companies having implemented or considering Hybrid, Plug-in Hybrid or Electric for passenger cars

CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

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

INSIGHT: The transition towards electrification remains much slower for LCVs than for PCs to date and in three years.

In %



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

CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

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

HOW TO READ THE RESULTS ?

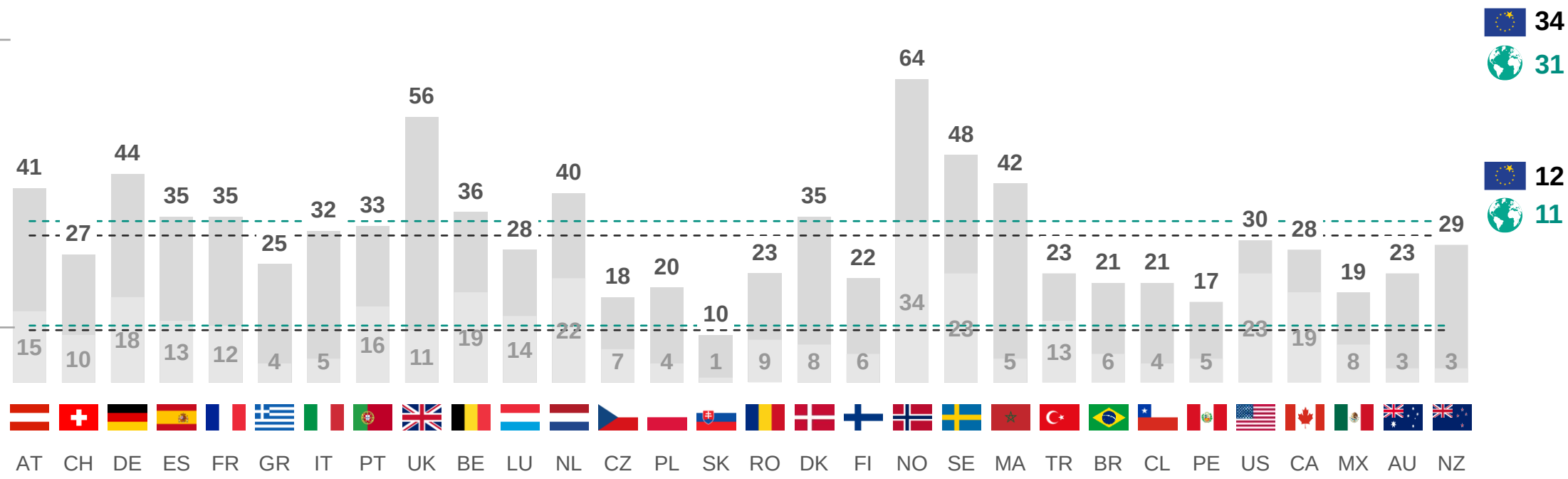
In Austria, 41% of the companies are already using or consider to implement at least one alternative technology in the next 3 years. 15% of the companies is currently using at least one.

In %

LCVs

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

ALREADY USING



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

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

LCV fleet

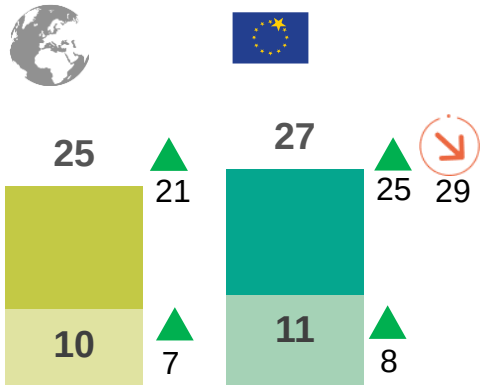
In %

LCVs

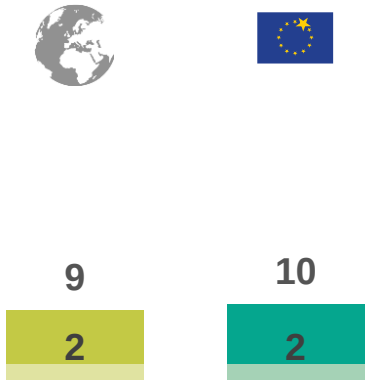
ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

ALREADY IMPLEMENTED

100% Battery Electric Vehicle



Hydrogen Fuel cell



XX Significantly higher than 2023 year

XX Significantly higher than 2022 year

XX = score 2023 or 2022

XX Significantly lower than 2023 year

XX Significantly lower than 2022 year

XX = score 2023 or 2022

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

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

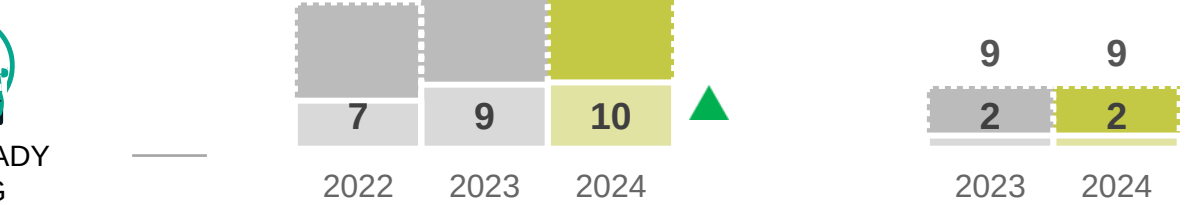
Evolution vs. previous years

In %

LCVs

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

ALREADY USING



	25	29▲	27	9	10
	8	11▲	11	2	2

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

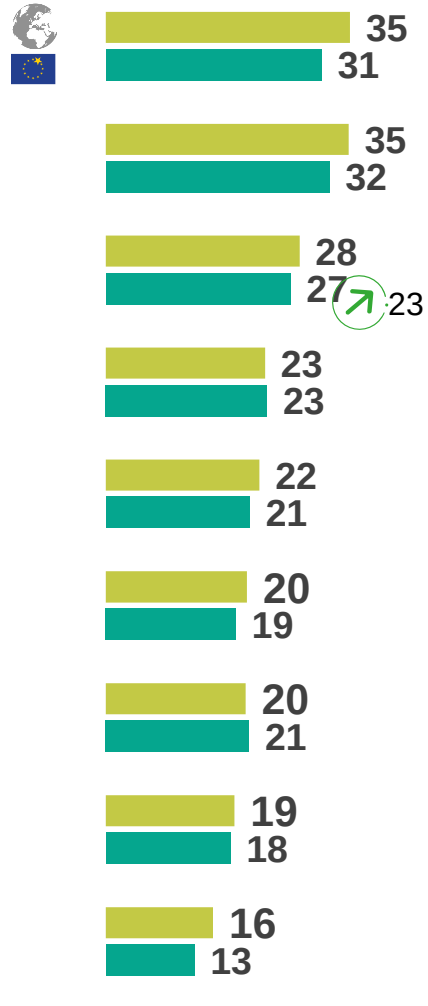
REASONS FOR IMPLEMENTING OR CONSIDERING ALTERNATIVE FUEL TECHNOLOGIES

LCV fleet

INSIGHT: Among companies having implemented or considering implementing alternative fuel technologies in their LCV fleet, the shift to this technology is primarily driven by fuel expenses and their lower environmental impact

In %

LCVs



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

5

ENERGY MIX
FOCUS PER ALTERNATIVE TECHNOLOGY

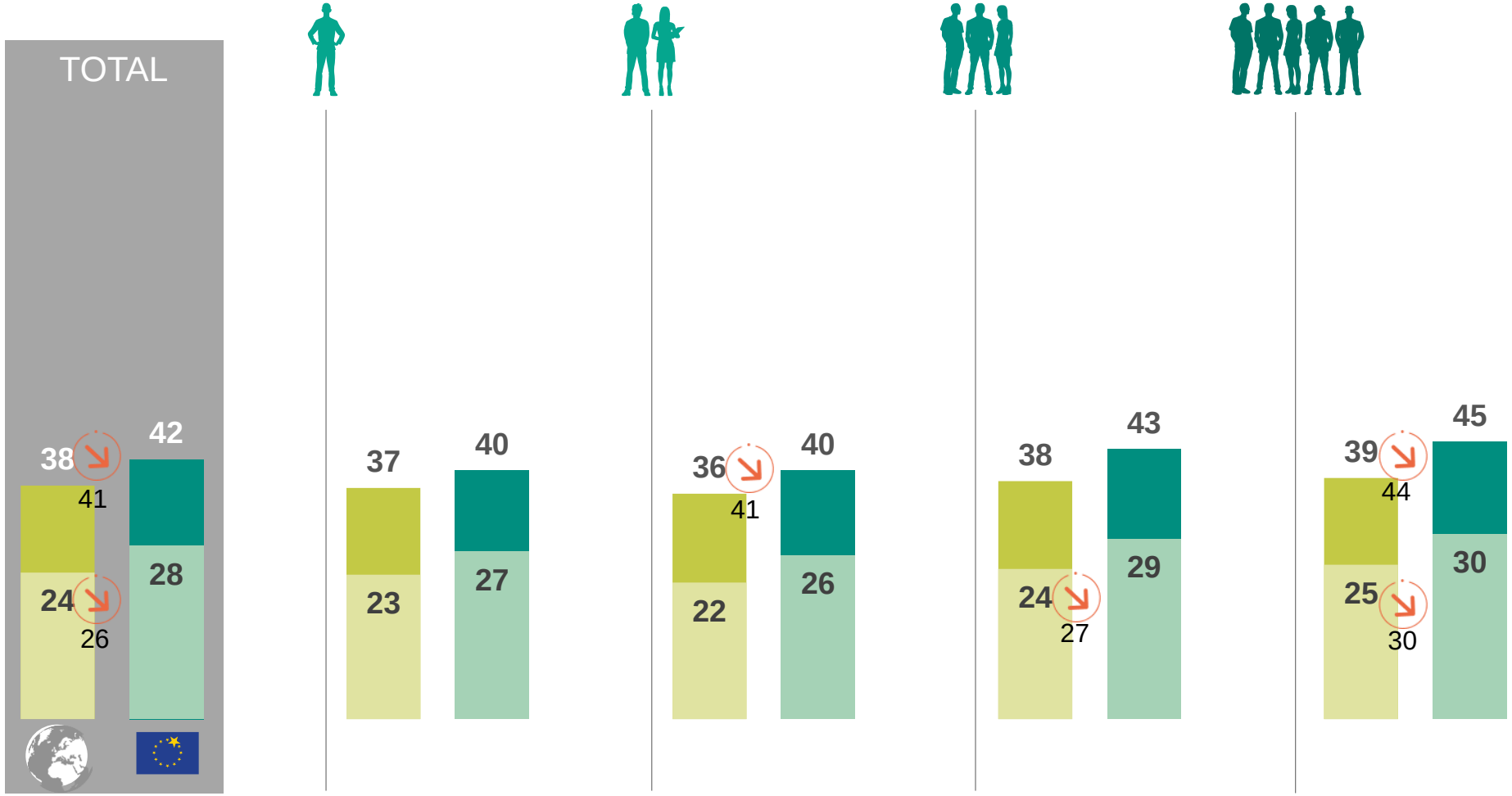
HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %

Passenger cars

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

ALREADY USING



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

HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

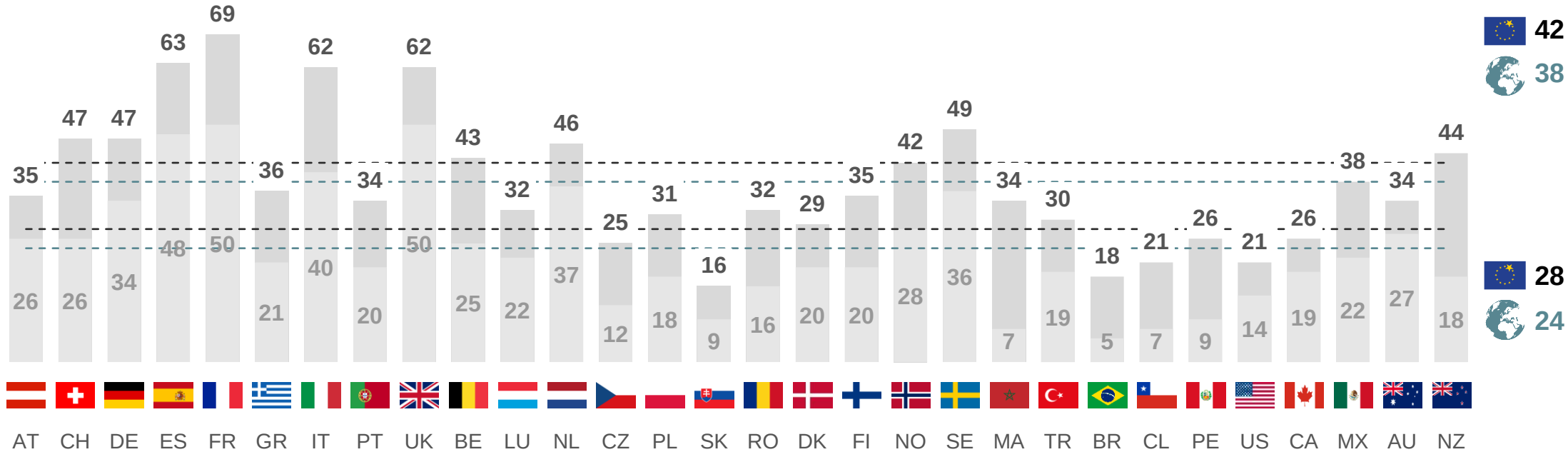
INSIGHT: The adoption remains very heterogeneous across markets

In %

Passenger cars

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING

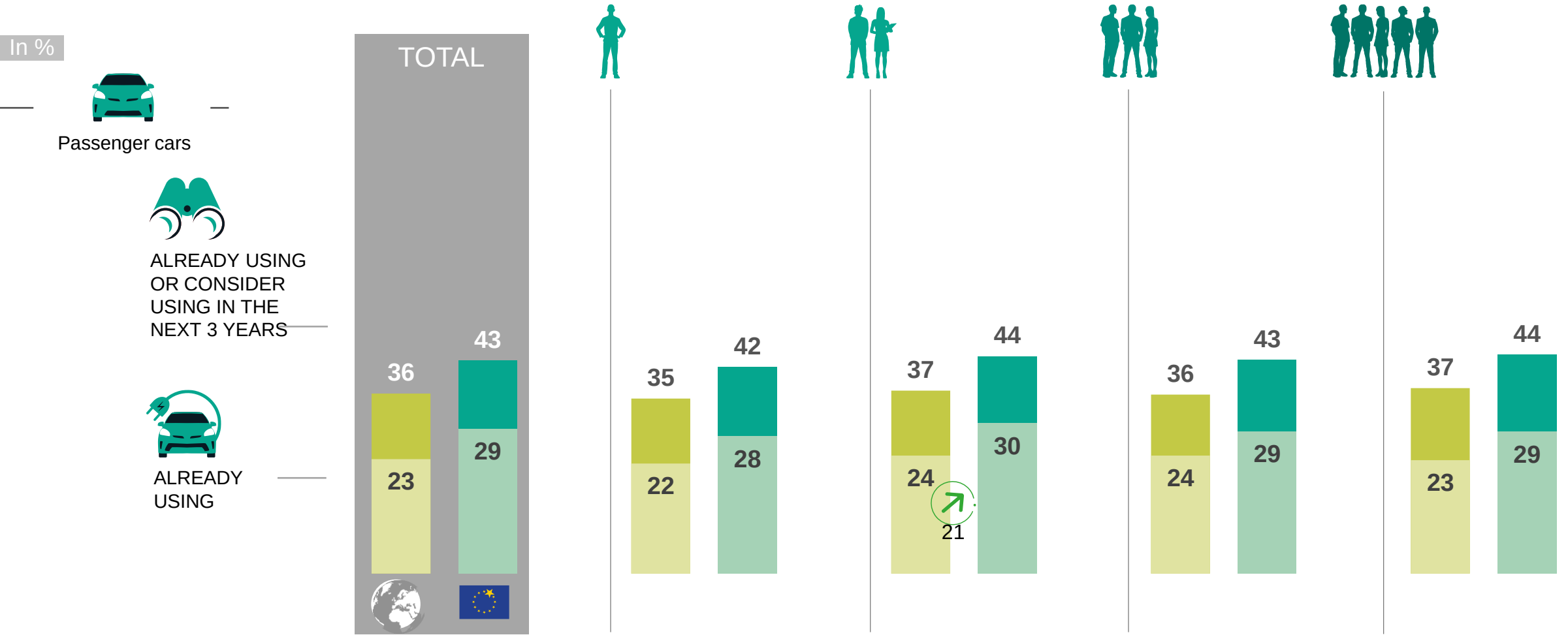


42
38

28
24

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

PLUG-IN HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY



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

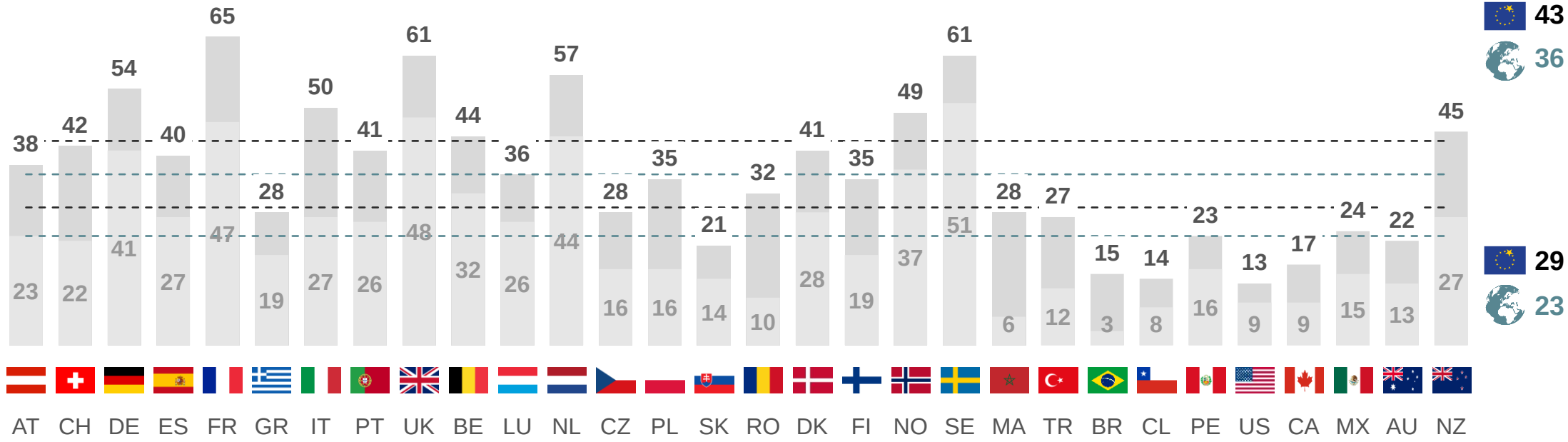
PLUG-IN HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %

Passenger cars

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



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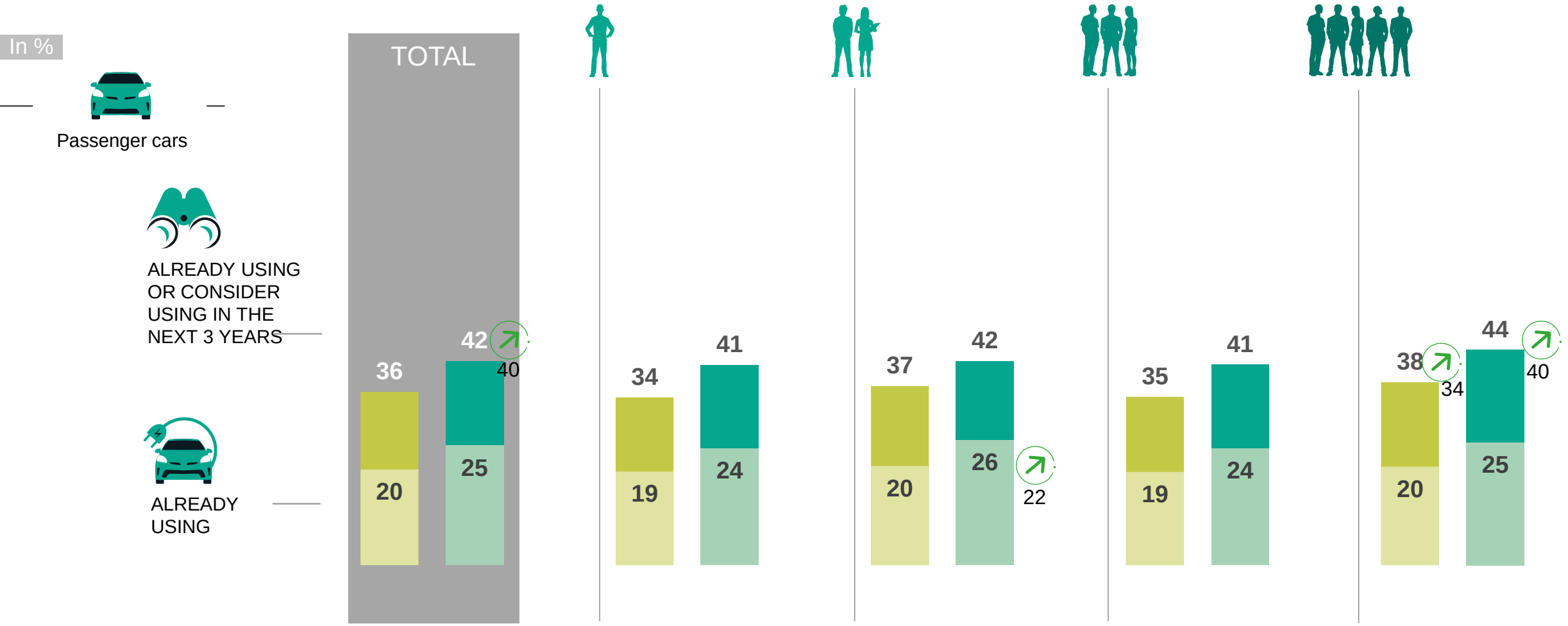
Amongst the following alternative fuel technologies, which ones do you currently use…?
Amongst the following alternative fuel technologies, which ones are you considering using…?
Basis: companies with passenger cars

100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY



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

100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

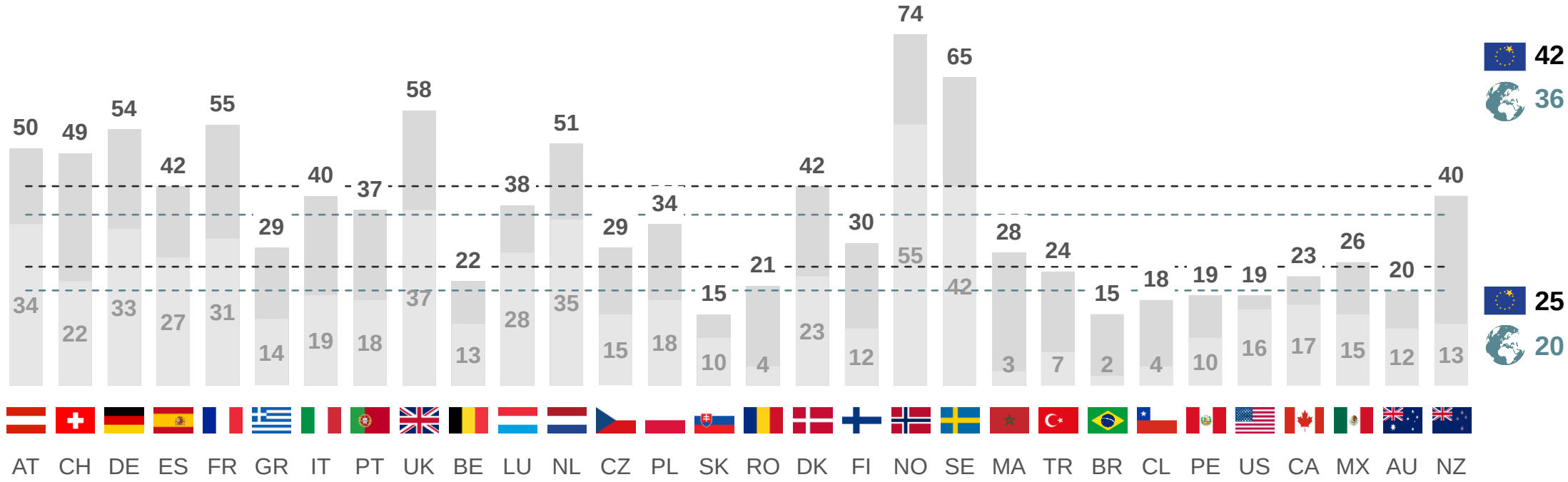
INSIGHT: The adoption remains very heterogeneous across markets, Western Europe and Nordics leading by far, while the transition is much slower in Eastern Europe, LatAm , Morocco, Turkey, US and Canada

In %

Passenger cars

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



42
36
25
20

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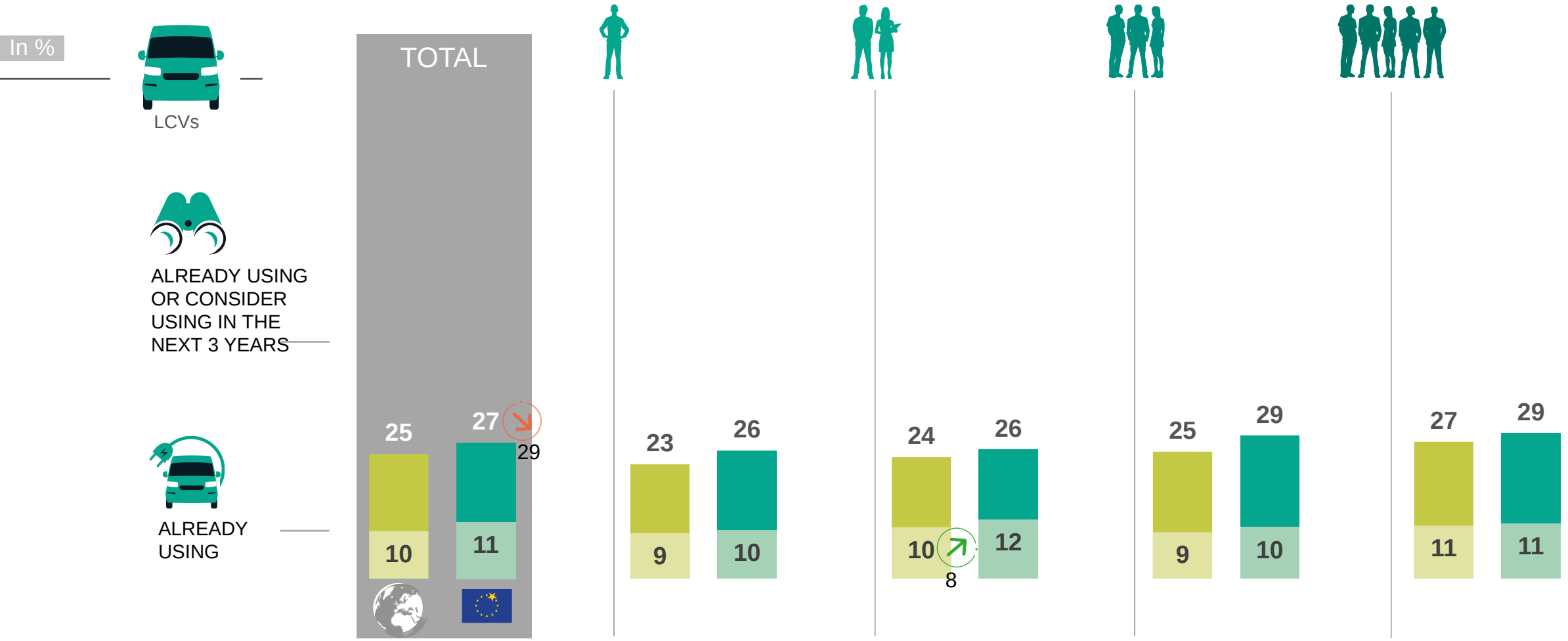
Amongst the following alternative fuel technologies, which ones do you currently use…?
Amongst the following alternative fuel technologies, which ones are you considering using…?
Basis: companies with passenger cars

100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY



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

100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

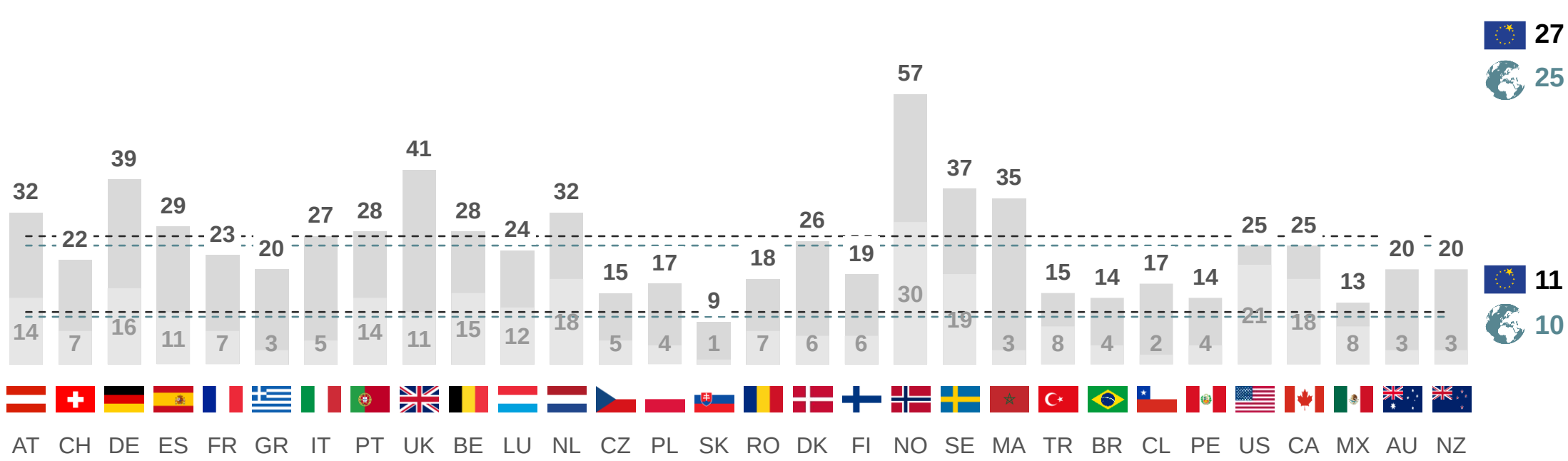
INSIGHT: The adoption remains very heterogeneous across markets

In %

LCVs

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



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

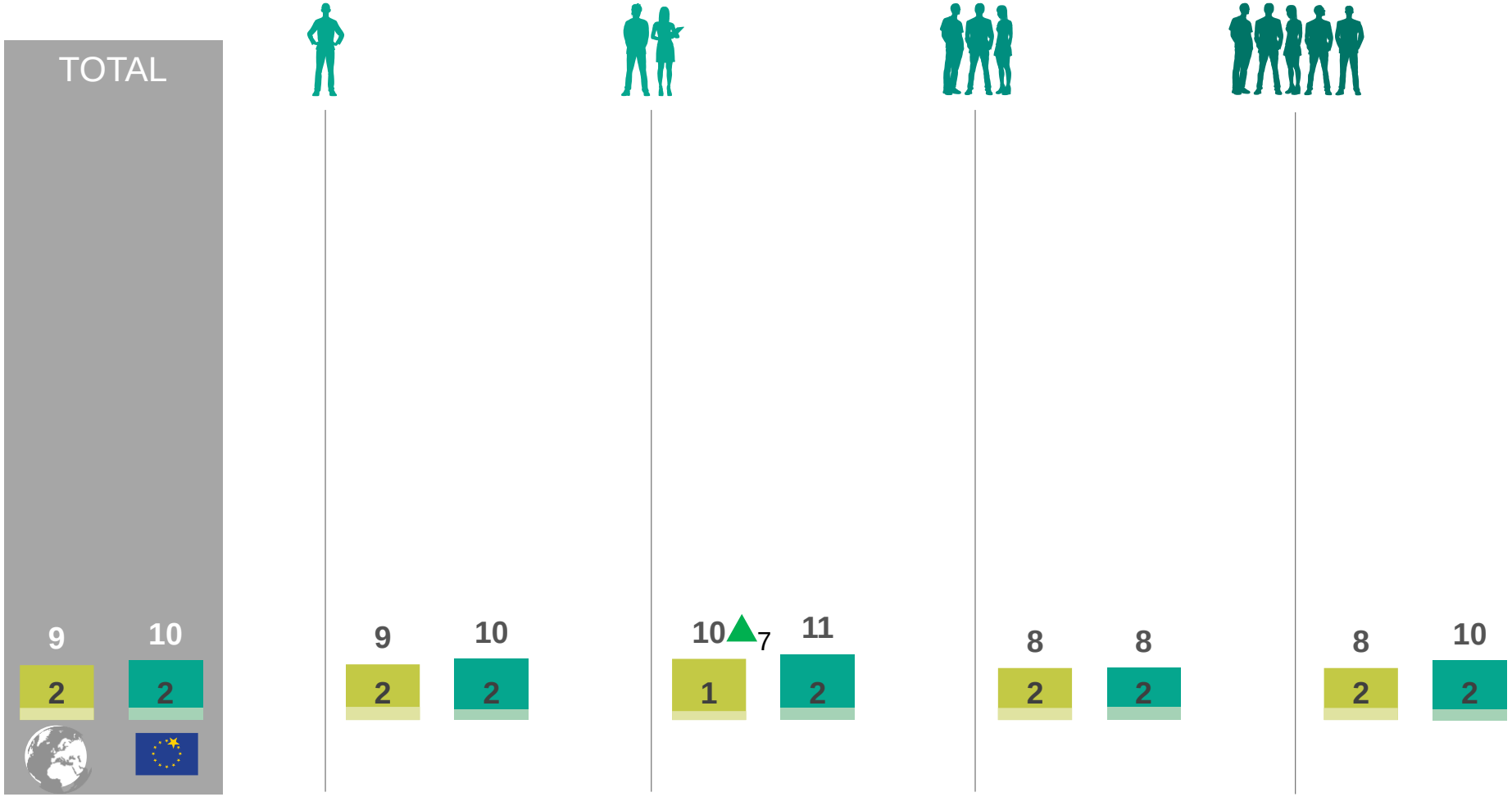
HYDROGEN FUEL CELL ELECTRIC VEHICLE : IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %

LCVs

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

ALREADY USING



Arval Mobility Observatory

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

HYDROGEN FUEL CELL ELECTRIC VEHICLE : IMPLEMENTATION WITHIN COMPANY FLEET POLICY

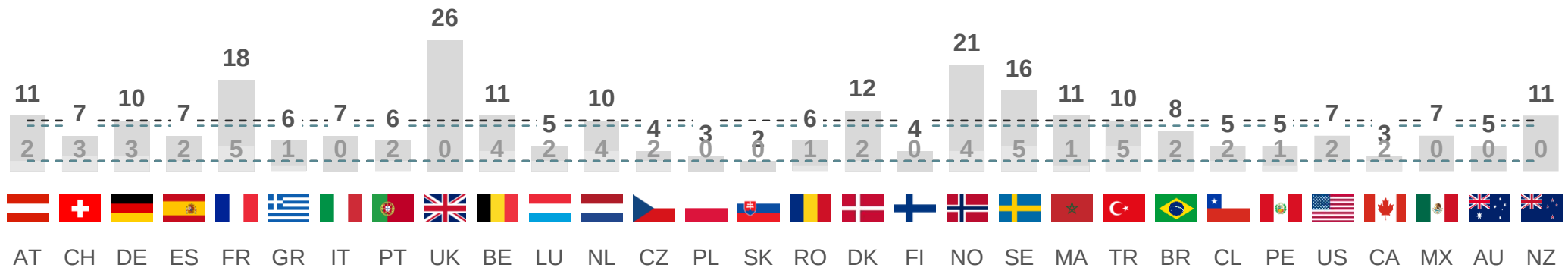
INSIGHT: The adoption is very low yet but with showing opportunities in a few countries.

In %

LCVs

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



10
9

2
2

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

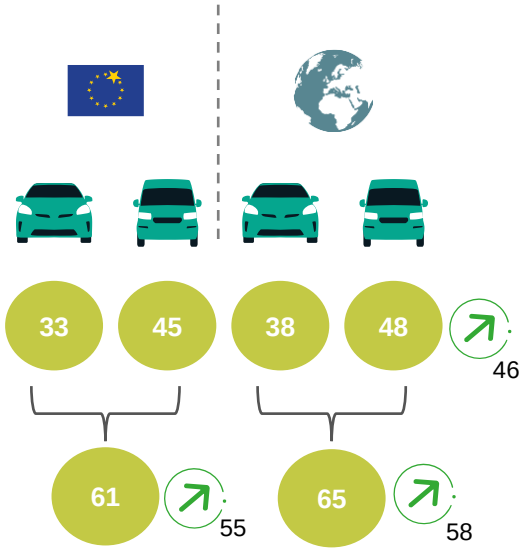
CONSTRAINTS OF BATTERY ELECTRIC VEHICLE USAGE

INSIGHT: Among companies not considering BEV yet, the lack of charging infrastructure and higher purchase prices still represent major barriers..

In %

Passenger cars + LCVs

Do not consider implementing battery electric vehicles



Not enough public charging points	35	36 ↗ 30
The purchase price is higher than a regular fuel car	35	34
No charging points at your company offices	31 ↗ 29	30
No charging solutions at your employees' home	29 ↗ 25	29
The range of models is limited for this type of vehicles	28	26 ↗ 23
The questions raised on their reliability	21	20
Your employee's reluctance to drive electric vehicles	16	14 ↗ 12

70% Charging points

↗ XX Significantly higher than 2023 year

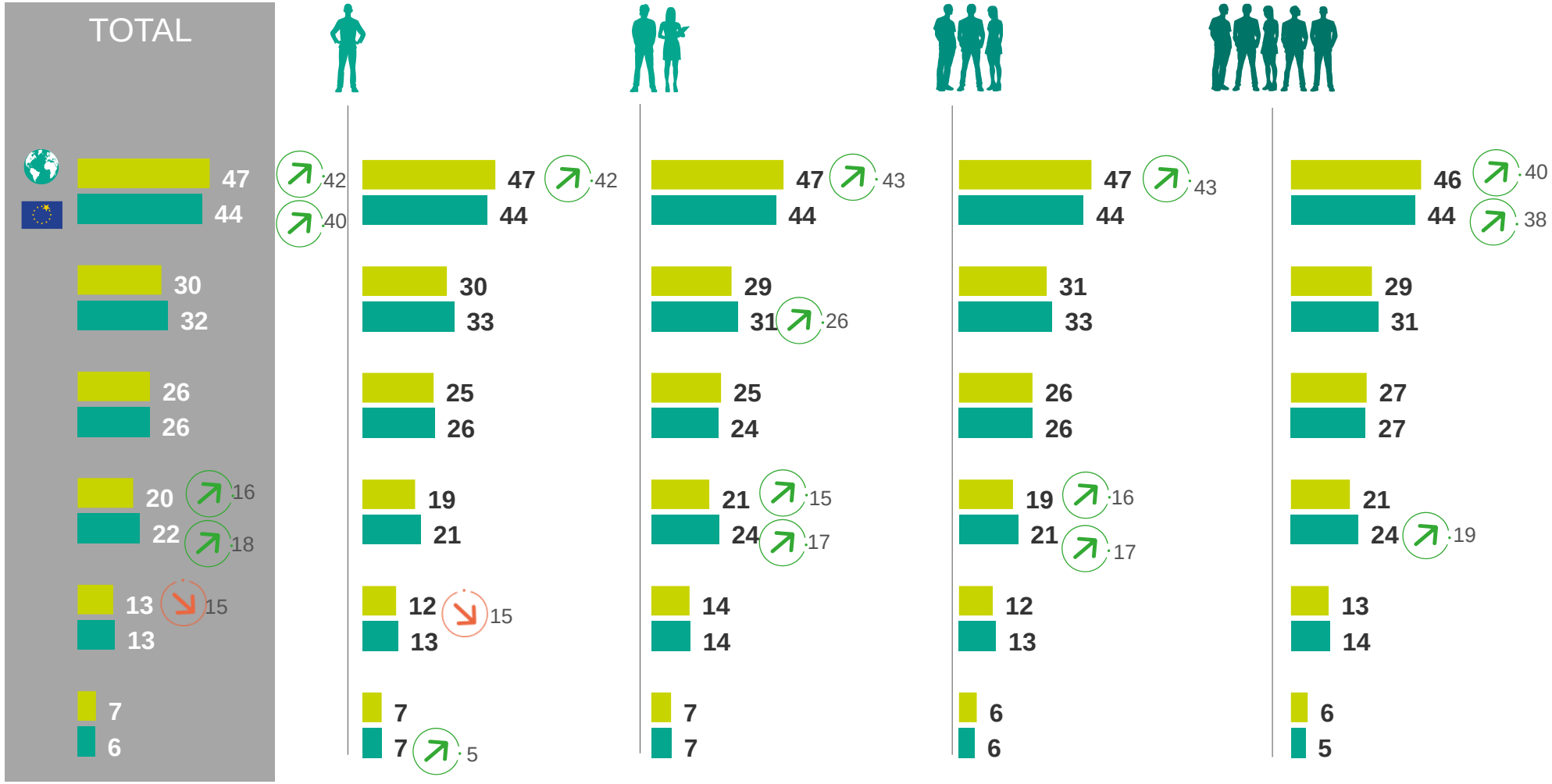
↘ XX Significantly lower than 2023 year

What are the constraints of using 100% Battery Electric vehicles?
Basis: Not considering 100% BEV technology

ACCESS TO CHARGING POINTS

In %

Passenger cars + LCVs



Arval Mobility Observatory

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

In terms of charging point installation and responsibility for the cost of charging for battery electric and plug-in hybrid vehicles in your company...?
Basis: companies already using or considering BEV/PHEV for passenger cars or BEV for LCV

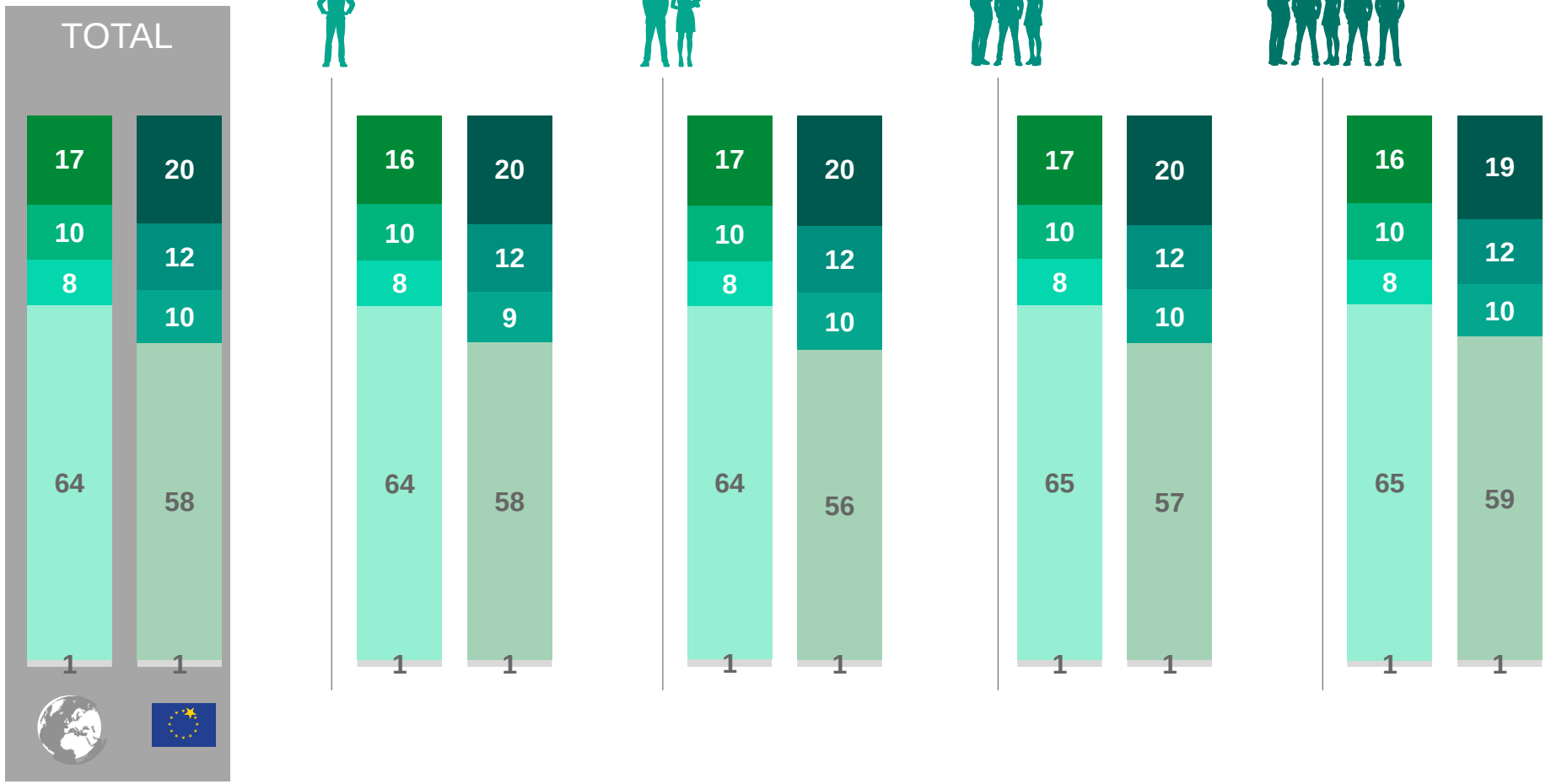
EXPECTED FLEET SHARE PER ENERGY

HOW TO READ THE RESULTS ? The fleet managers estimate 17% of their passenger cars fleet will be BEV in 3 years from now.

INSIGHT: Electrified (PHEV, HEV and BEV) passenger cars should represent 35% of the vehicle mix for the foreseeable future at global level. In Europe, the estimation is at 42% . This view is remarkably consistent across fleets of all sizes.

In %

Passenger cars



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

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

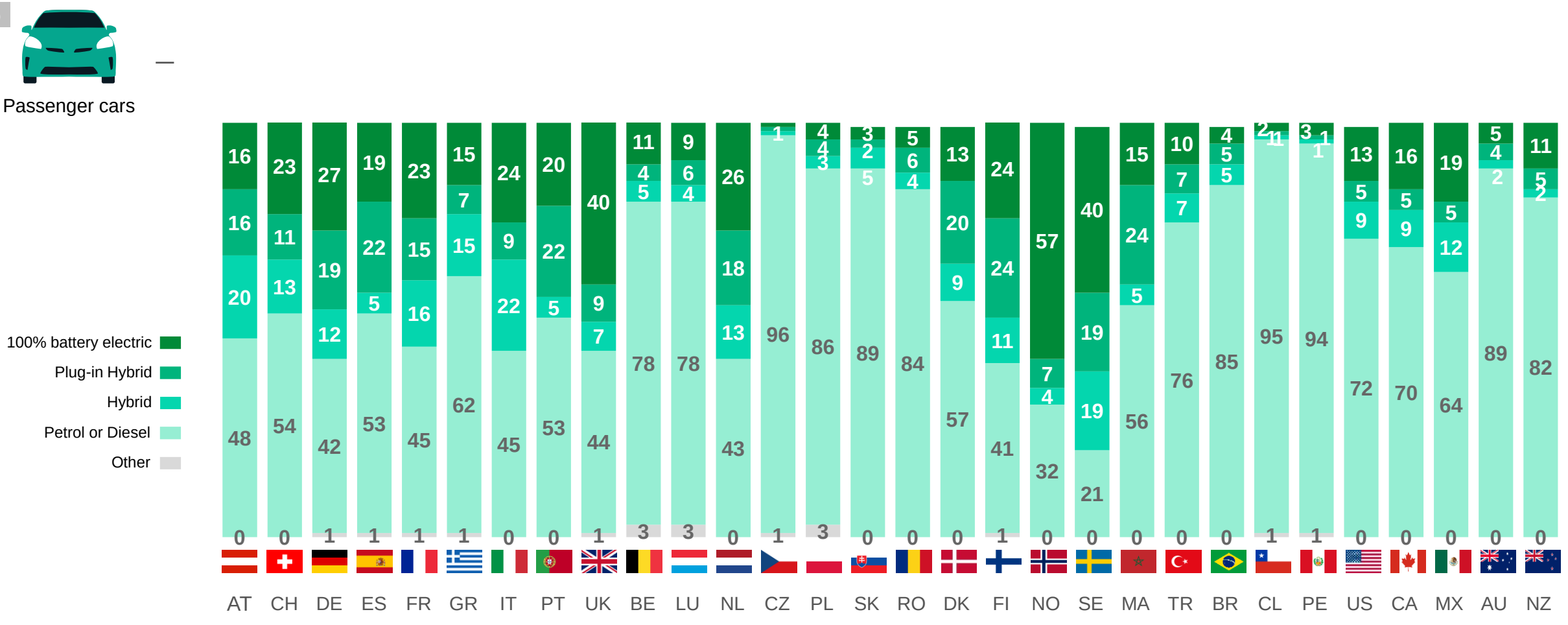
EXPECTED FLEET SHARE PER ENERGY

HOW TO READ THE RESULTS ?

In Austria in 3 years, 16% of the companies passenger car fleet is expected to be 100% BEV.

In %

Passenger cars



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

EXPECTED FLEET SHARE PER ENERGY

HOW TO READ THE RESULTS ?

In Europe in 3 years, 13% of the light commercial vehicle fleet is expected to be BEV.

In %

LCVs

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

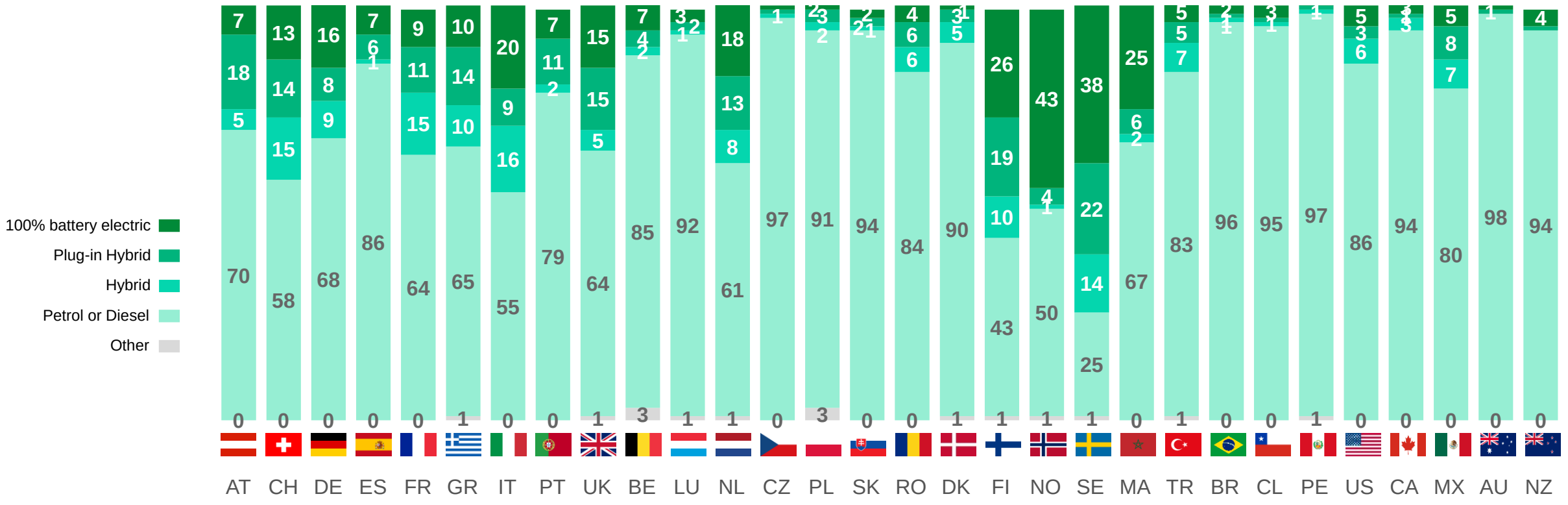
EXPECTED FLEET SHARE PER ENERGY

HOW TO READ THE RESULTS ?

In Austria in 3 years, 7% of the light commercial vehicle fleet is expected to be BEV.

In %

LCVs

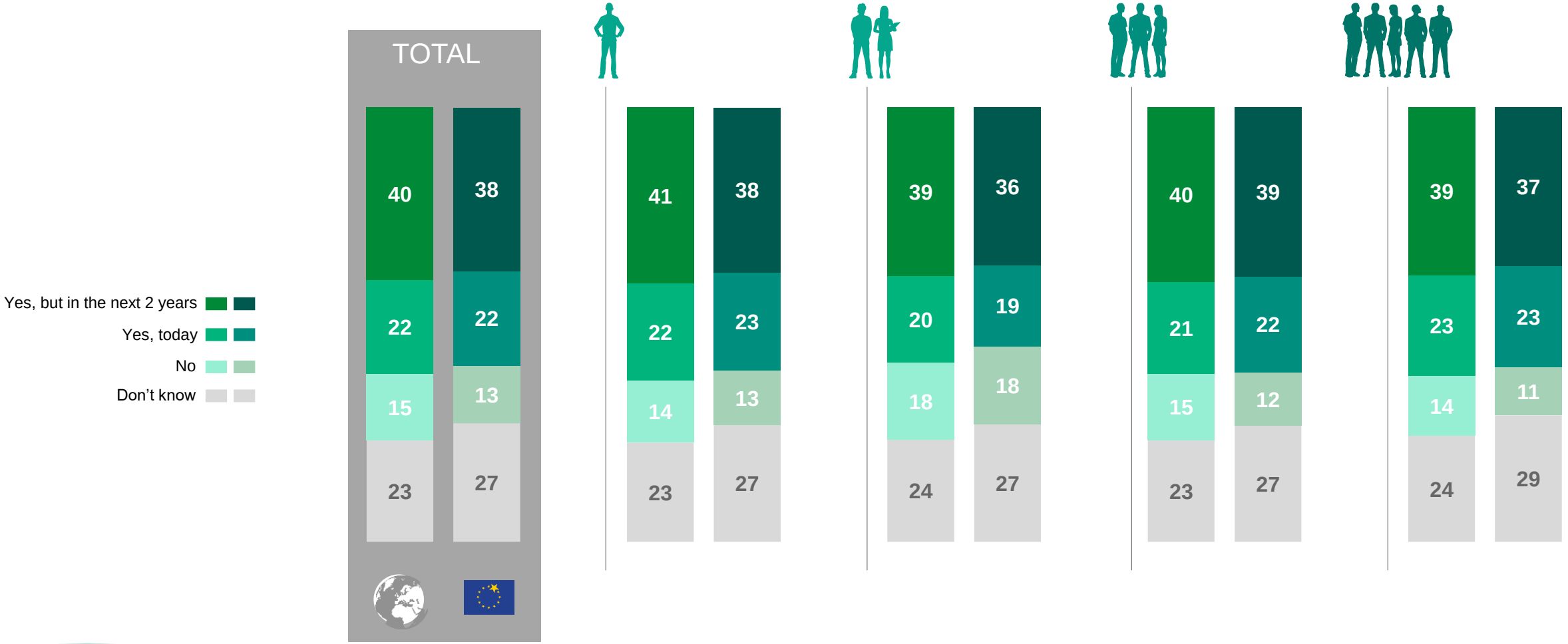


In your opinion, what percentage of your light commercial vehicle fleet will be: 100% battery electric, Plug-in Hybrid, Hybrid, petrol or diesel vehicles in 3 years?
Basis: companies with LCVs

ELIGIBILITY TO ESG REGULATORY PUBLIC REPORTING

INSIGHT: 22% of the respondents declare they are eligible today for ESG regulatory public reporting, while 40% expect this to be the case in the next 2 years, clearly showing a more and more structured framework for sustainability reporting.

In %



New question added in 2024

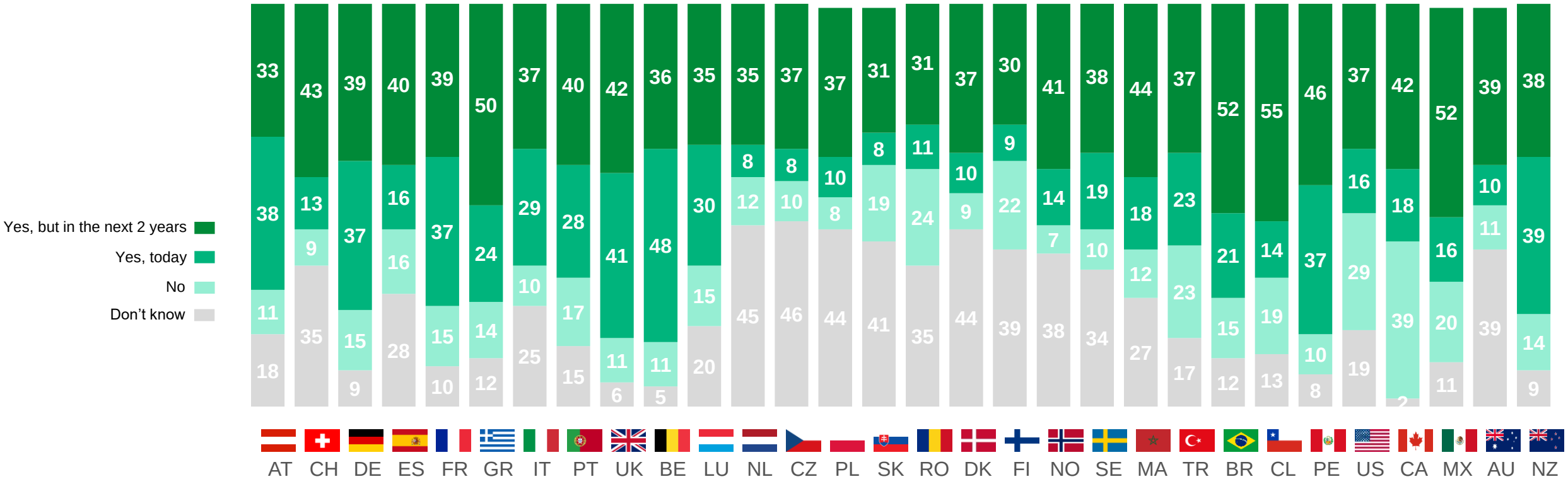
Is your company eligible to any ESG regulatory public reporting today or in the next 2 years?
Basis: companies with corporate vehicles = 100%

ELIGIBILITY TO ESG REGULATORY PUBLIC REPORTING

HOW TO READ THE RESULTS ?

In Austria, 38% of companies interviewed are eligible to ESG Regulatory public reporting today. 33% are eligible in the next 2 years.

In %



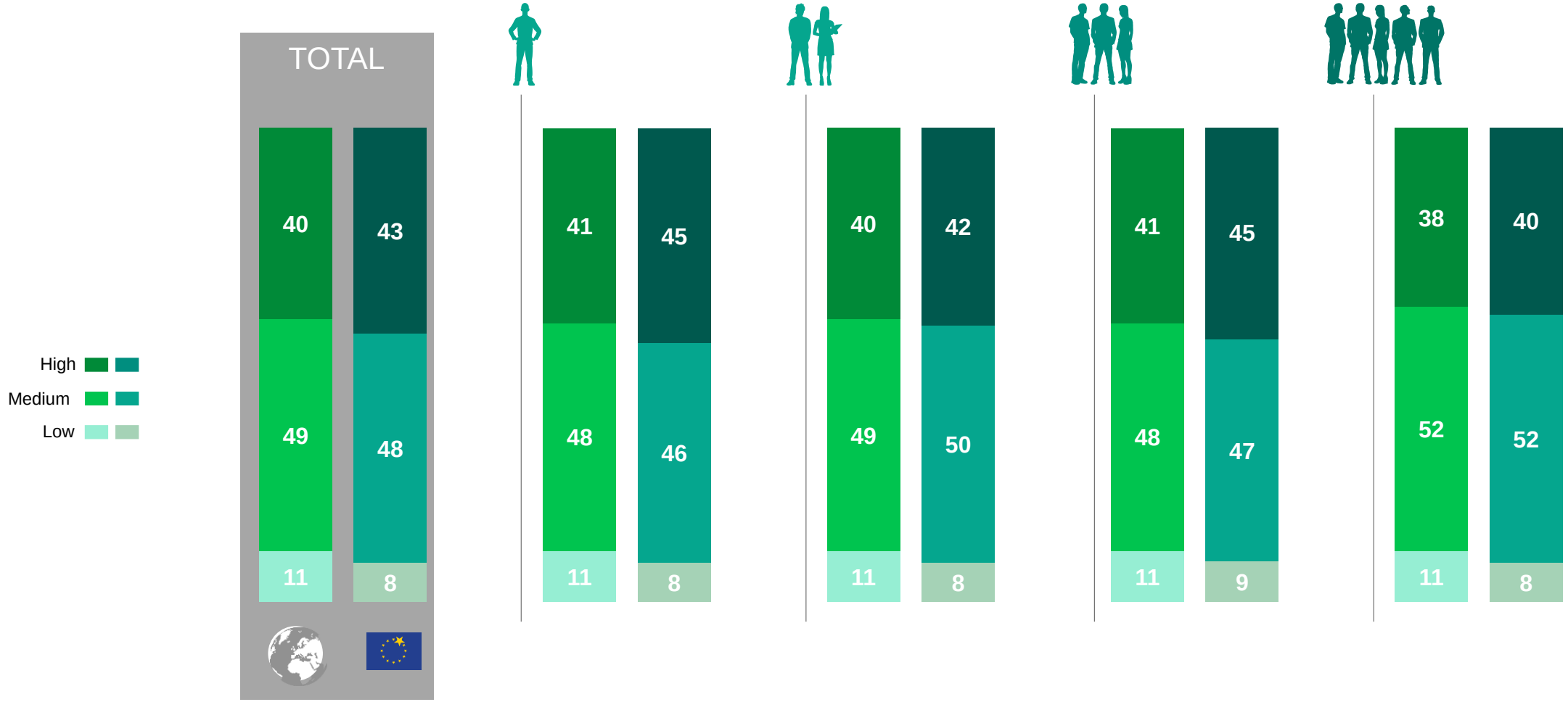
New question added in 2024

Is your company eligible to any ESG regulatory public reporting today or in the next 2 years?
Basis: companies with corporate vehicles = 100%

IMPORTANCE OF EMPLOYEES MOBILITY IN ESG REPORTING

INSIGHT: 4 out of 10 companies consider employee mobility (fleet, commuting, travel) of high importance in the overall ESG reporting approach, while 49% place it as medium importance. c

In %



Arval Mobility Observatory

New question added in 2024

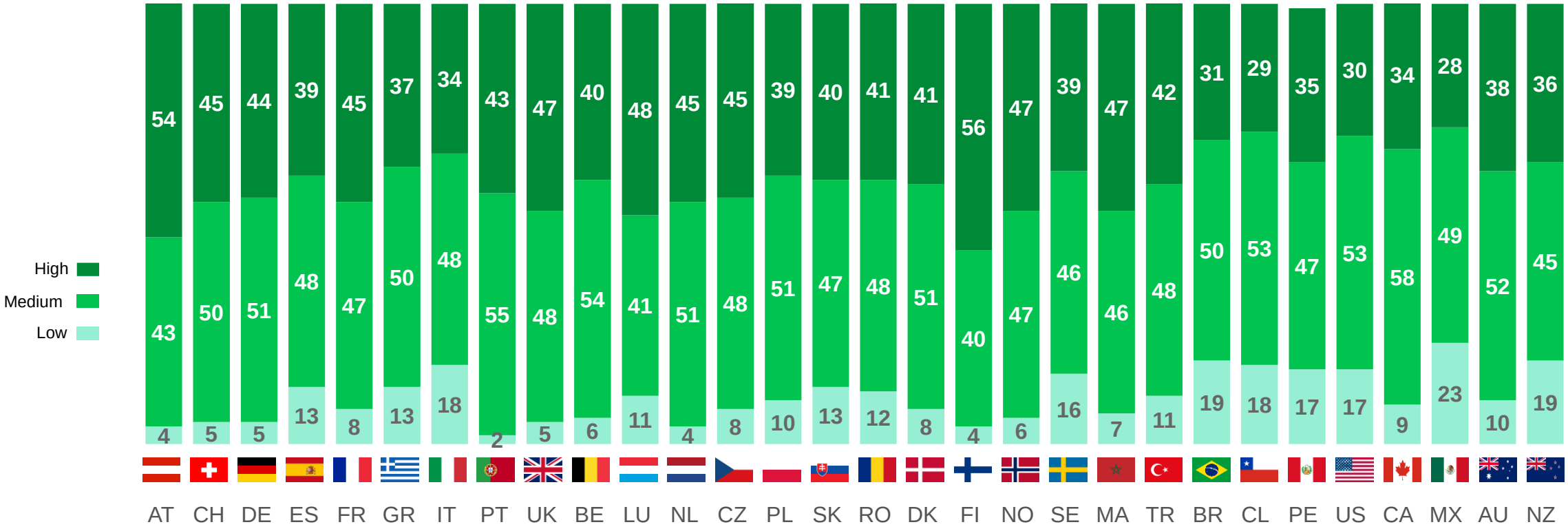
In your company, which importance does employees mobility (fleet, commuting, travel) have/will have in your overall ESG reporting approach ?
Basis: companies eligible to ESG regulatory public reporting

IMPORTANCE OF EMPLOYEES MOBILITY IN ESG REPORTING

HOW TO READ THE RESULTS ?

In Austria, 54% of companies eligible to ESG regulatory public reporting consider employee mobility (fleet, commuting, travel) of high importance in the overall ESG reporting approach, while 43% place it as medium importance.

In %



New question added in 2024

In your company, which importance does employees mobility (fleet, commuting, travel) have/will have in your overall ESG reporting approach ?
Basis: compagnies eligible to ESG regulatory public reporting

6

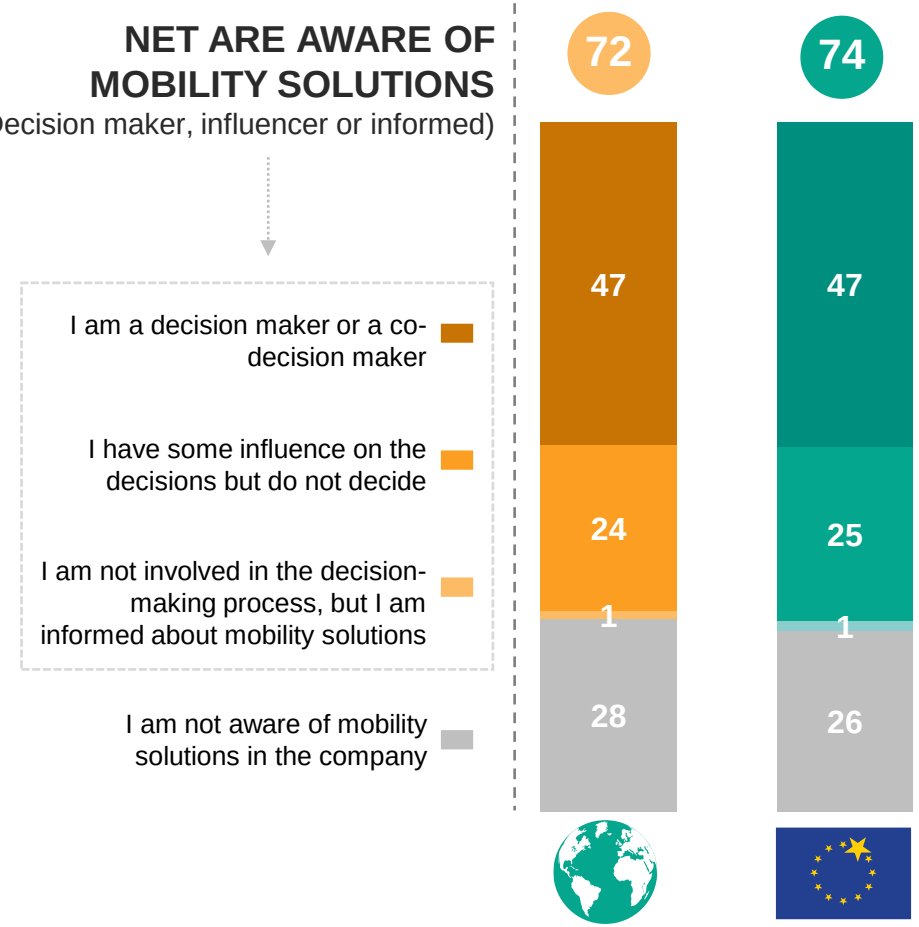
WHAT ARE THE PERSPECTIVES IN TERMS OF MOBILITY SOLUTIONS?

MOBILITY SOLUTION DECISION MAKERS

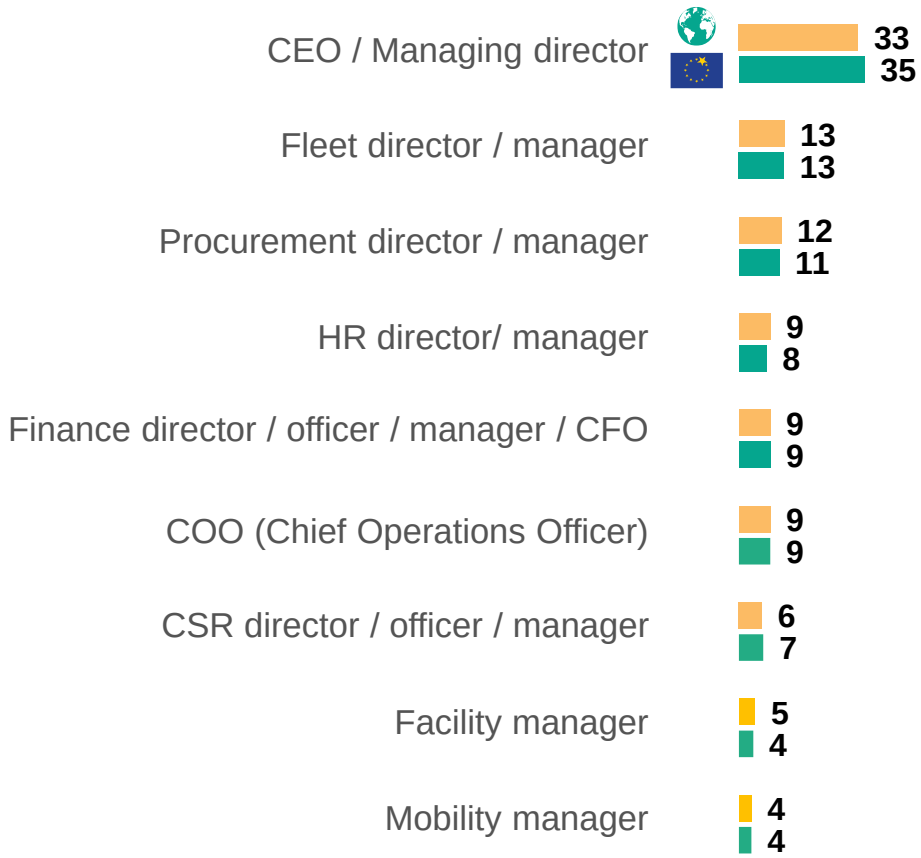
INSIGHT: In 2024, only respondents that are aware of mobility solutions were interviewed, which means almost 72% of overall population (no impact on the representativity of the results).

RESPONDENTS INVOLVEMENT IN MOBILITY SOLUTION DECISIONS

NET ARE AWARE OF MOBILITY SOLUTIONS
(Decision maker, influencer or informed)



POSITION OF THE PERSON WHO DECIDES ON MOBILITY SOLUTIONS



To what extent are you informed about mobility solutions using other modes of transportation than company cars (such as car sharing , bike sharing etc…..)
What is the position of the person who decides on mobility solutions in your company??
Basis: companies with corporate vehicles = 100%

MOBILITY SOLUTIONS LIST AND DEFINITIONS

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

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

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

PUBLIC TRANSPORT

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

AN APP PROVIDED BY THE COMPANY TO BOOK MOBILITY SOLUTIONS

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

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

CAR OR CASH ALLOWANCE

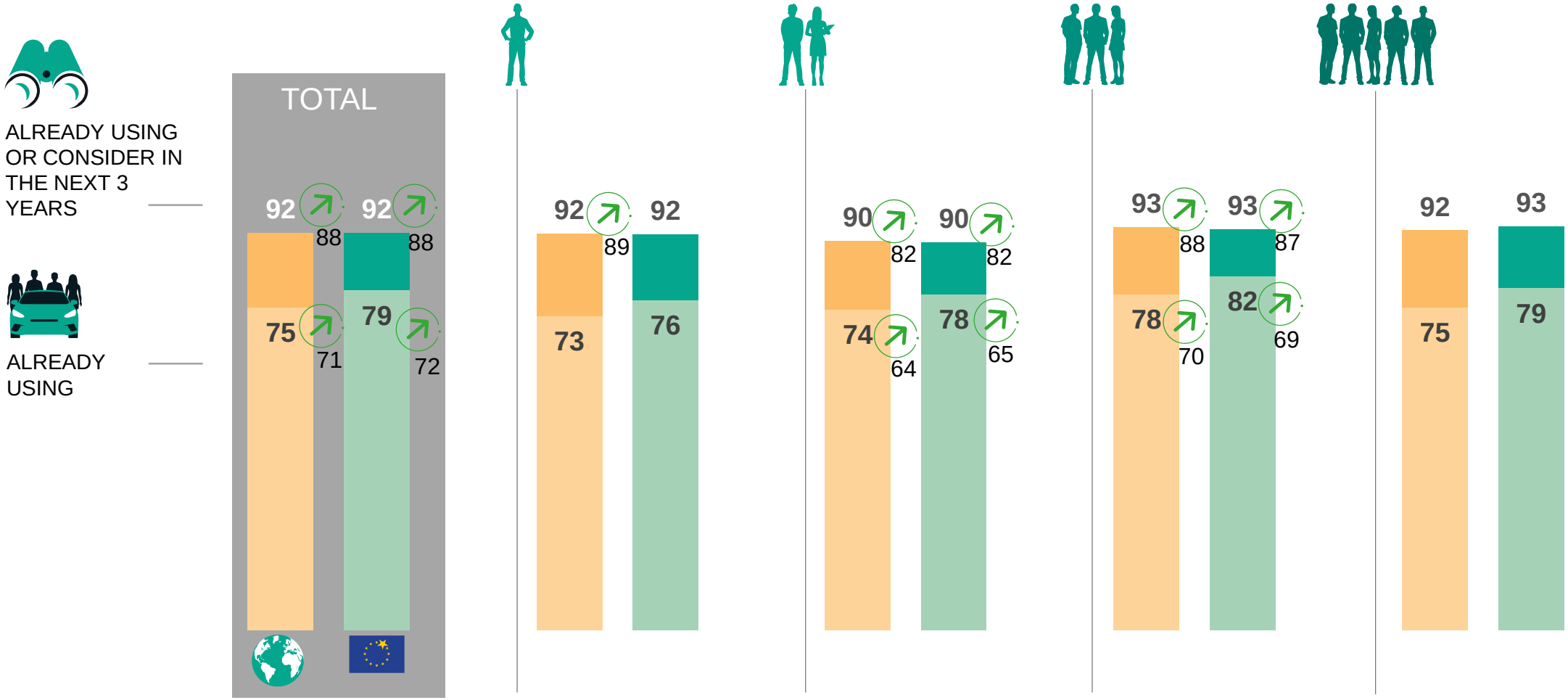
Arval Mobility Observatory

MOBILITY SOLUTIONS IMPLEMENTATION

At least one already implemented

INSIGHT: 92 % of respondents (aware of mobility solutions) have already implemented or are considering implementing at least one alternative mobility solution in the next three years, an increase with 4 points compared to 2023 results. 75% of the them are already using at least one mobility solution.*

In %



Arval Mobility Observatory

***The list of mobility solutions used in the Barometer is**: Corporate Car Sharing, Ride Sharing, Bike (or other two wheels) sharing / Bike (or other two wheels) leasing), Public transport, Mobility Budget, An app provided by the company to book mobility solutions, Private Lease or Salary Sacrifice, A short or Mid Term rental vehicle, Car or Cash Allowance*

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

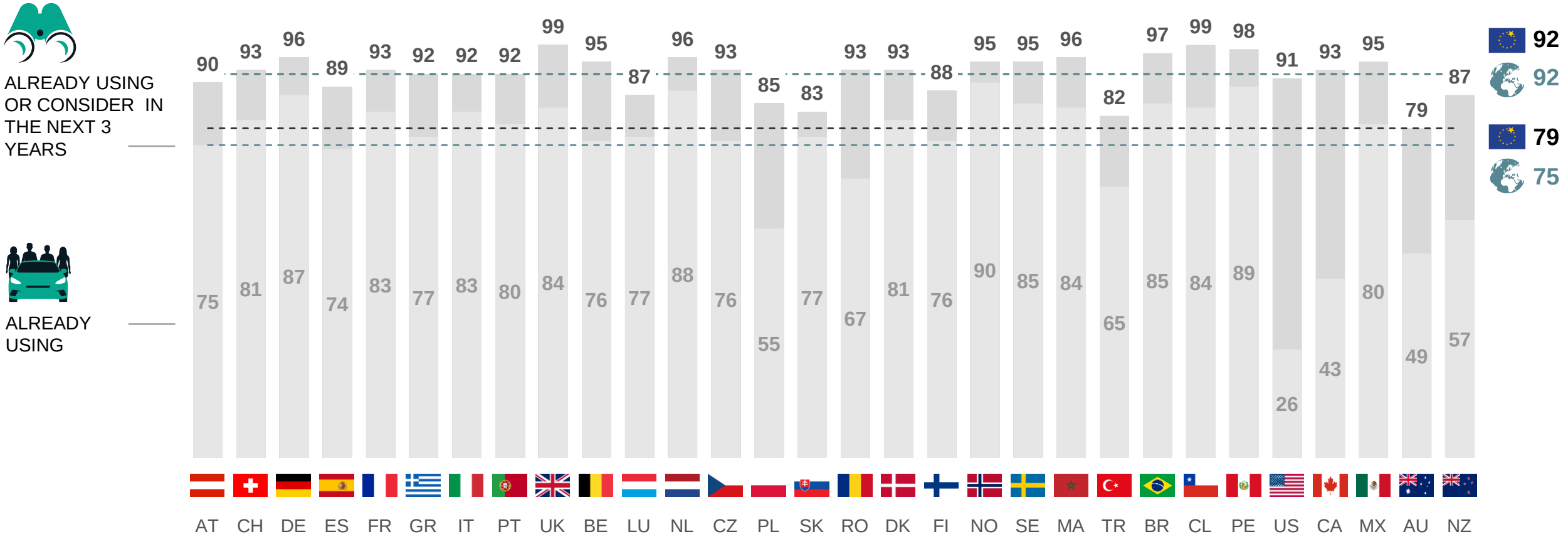
MOBILITY SOLUTIONS IMPLEMENTATION

At least one already implemented

HOW TO READ THE RESULTS ?

In Austria, 90% of the companies are already using or consider to implement at least one alternative mobility solution in the next 3 years. 75% of the companies is currently using at least one.*

In %



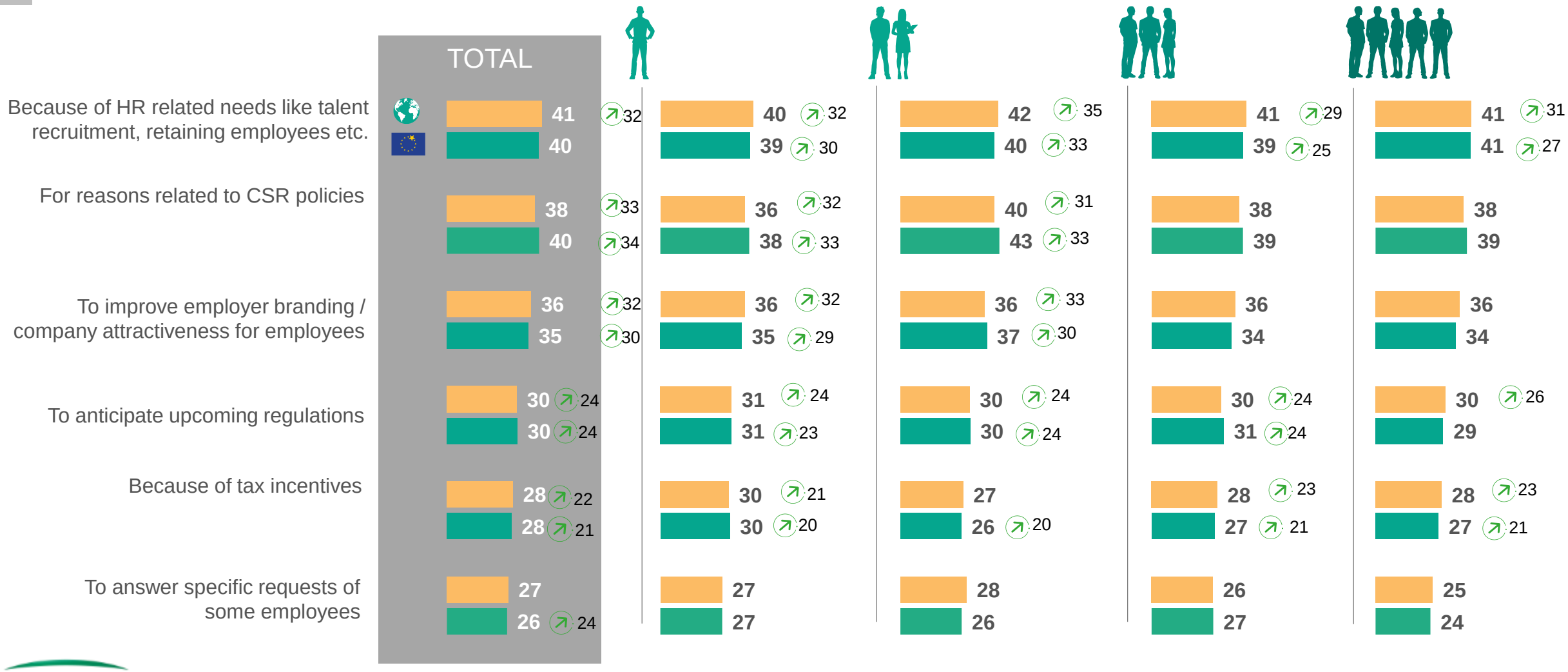
**The list of mobility solutions used in the Barometer is: Corporate Car Sharing, Ride Sharing, Bike (or other two wheels) sharing / Bike (or other two wheels) leasing), Public transport, Mobility Budget, An app provided by the company to book mobility solutions, Private Lease or Salary Sacrifice, A short or Mid Term rental vehicle, Car or Cash Allowance*

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

REASONS FOR IMPLEMENTING OR CONSIDERING MOBILITY SOLUTIONS

INSIGHT: Among companies having implemented or considering implementing mobility solutions, this positive trend is primarily driven by HR related needs, followed by CSR policies, and employees attractiveness. All reasons are showing an increase in 2024 compared to 2023.

In %



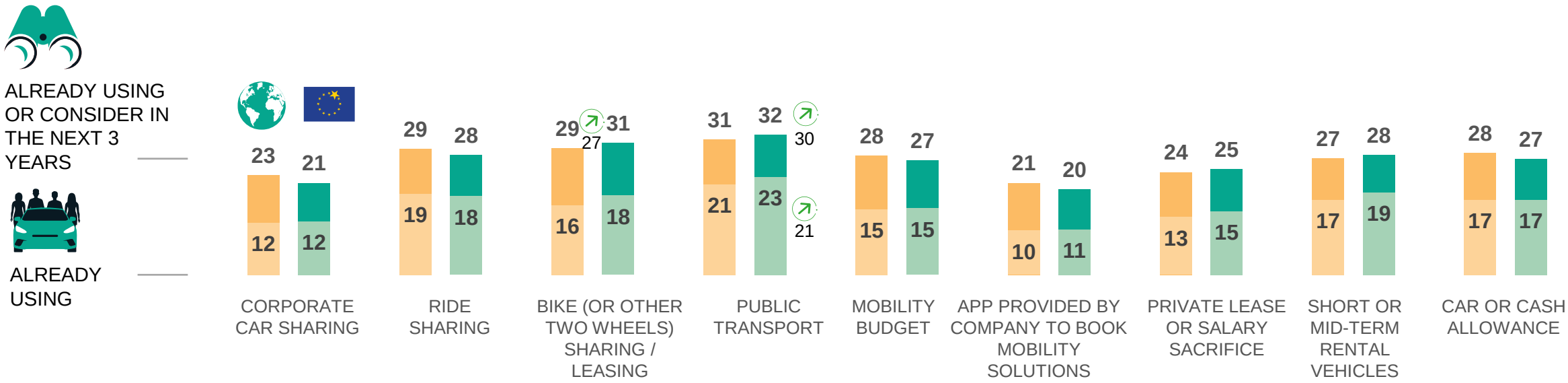
For what reasons has your company introduced or intends to introduce these mobility solutions?
Basis: companies introduced or intend to introduce at least one new mobility solution
Question asked to respondents that are aware of mobility solutions

OVERVIEW OF MOBILITY SOLUTIONS IMPLEMENTATION

In %

75% (71) | 79% (72)

Of companies have already implemented at least one of these solutions

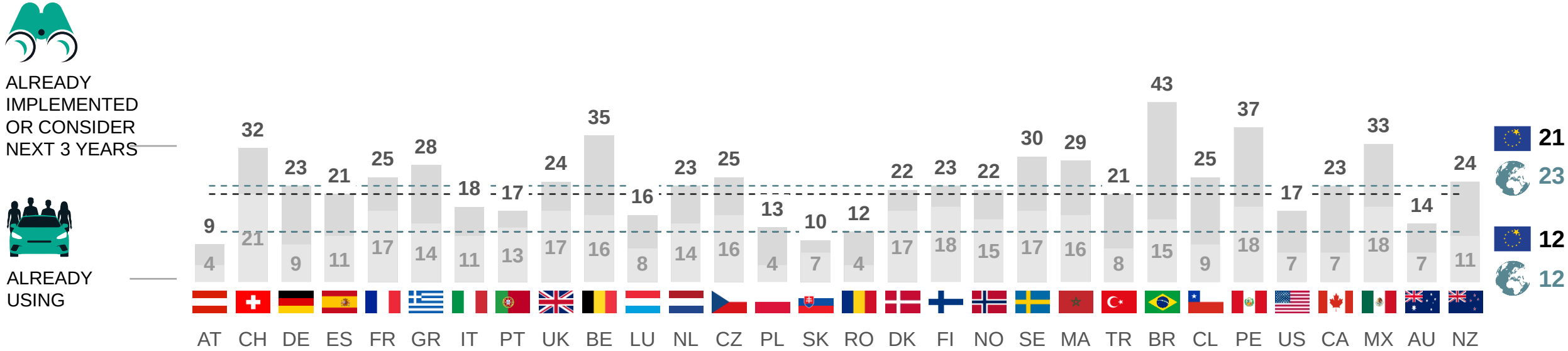


Which of the following have you implemented, or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions

CORPORATE CAR SHARING IMPLEMENTATION

INSIGHT: The penetration of each mobility solution shows strong differences across markets.

In %

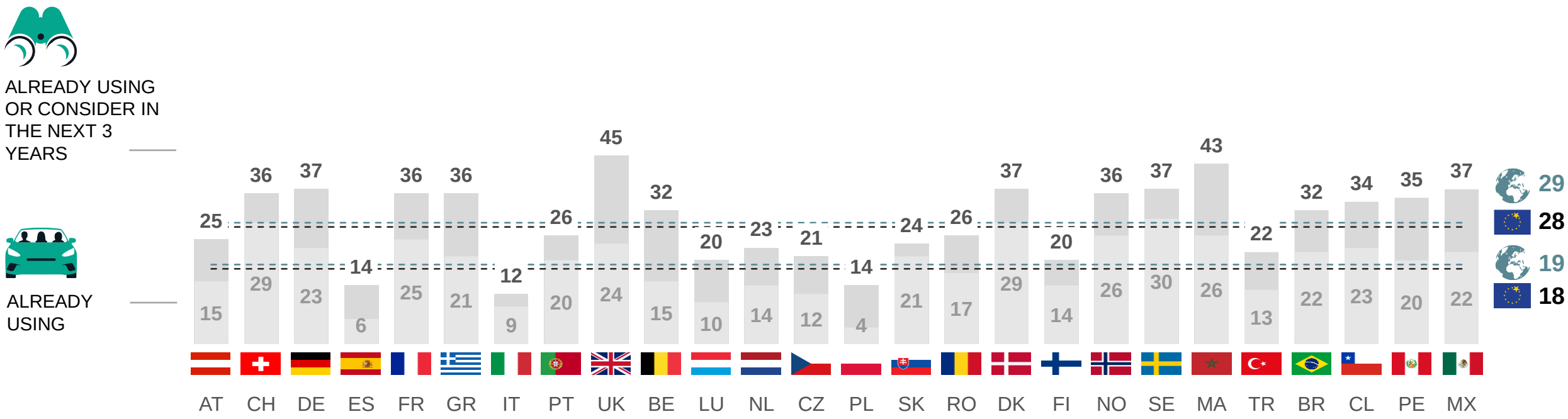


Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions

RIDE SHARING IMPLEMENTATION

INSIGHT: The penetration of each mobility solution shows strong differences across markets.

In %



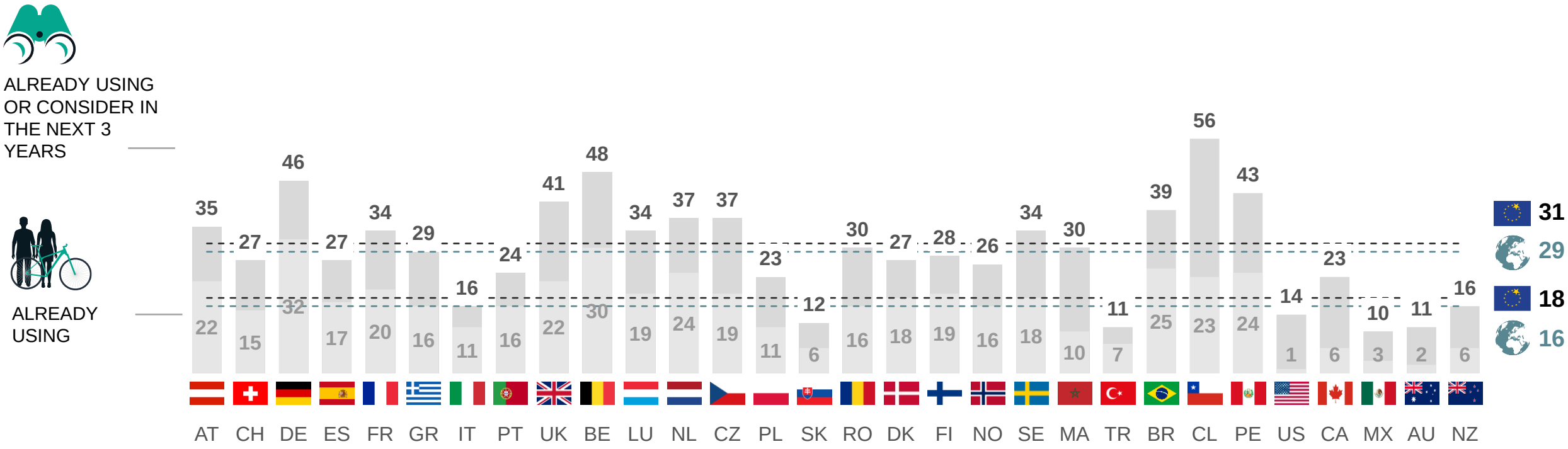
Arval Mobility Observatory

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

BIKE (OR OTHER TWO WHEELS) SHARING / LEASING IMPLEMENTATION

INSIGHT: The penetration of each mobility solution shows strong differences across markets.

In %

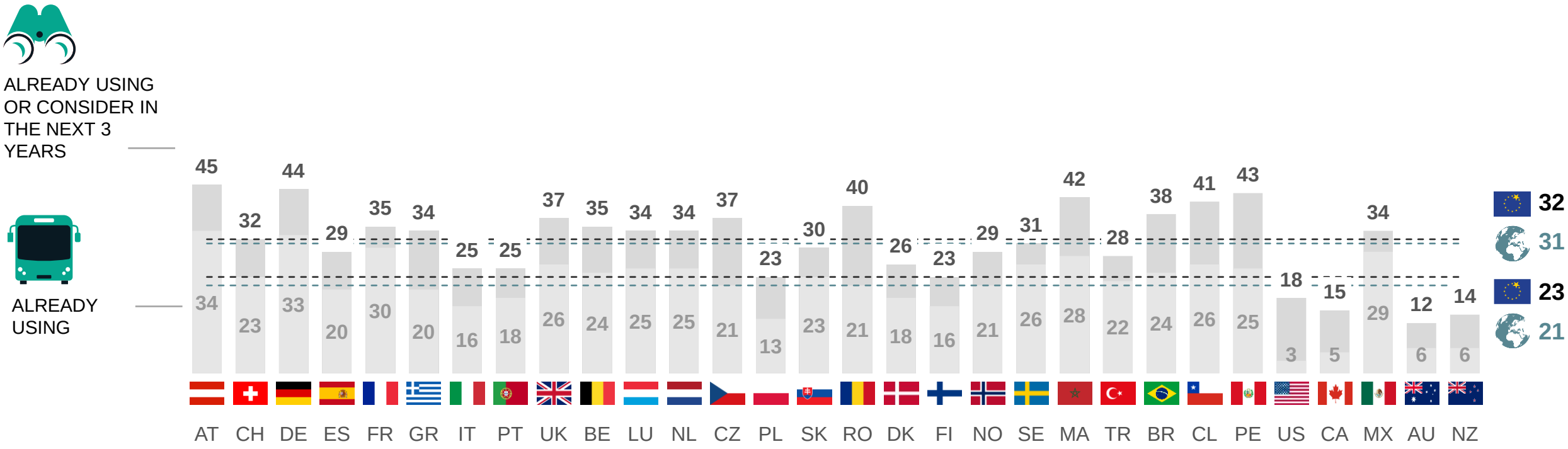


Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions

PUBLIC TRANSPORT IMPLEMENTATION

INSIGHT: The penetration of each mobility solution shows strong differences across markets.

In %

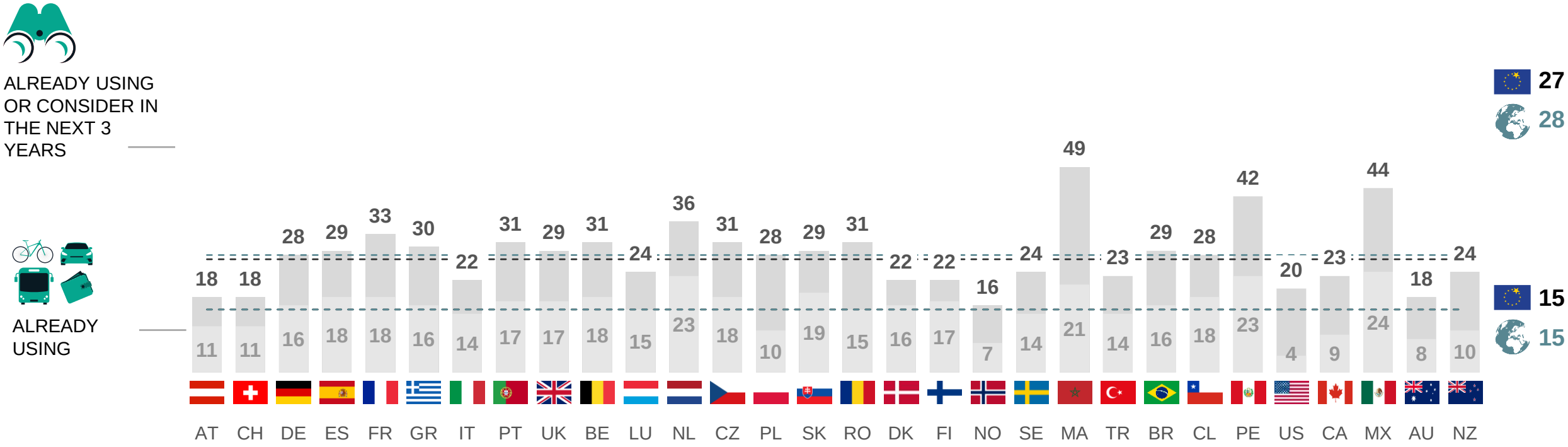


Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions

MOBILITY BUDGET IMPLEMENTATION

INSIGHT: The penetration of each mobility solution shows strong differences across markets.

In %



Arval Mobility Observatory

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

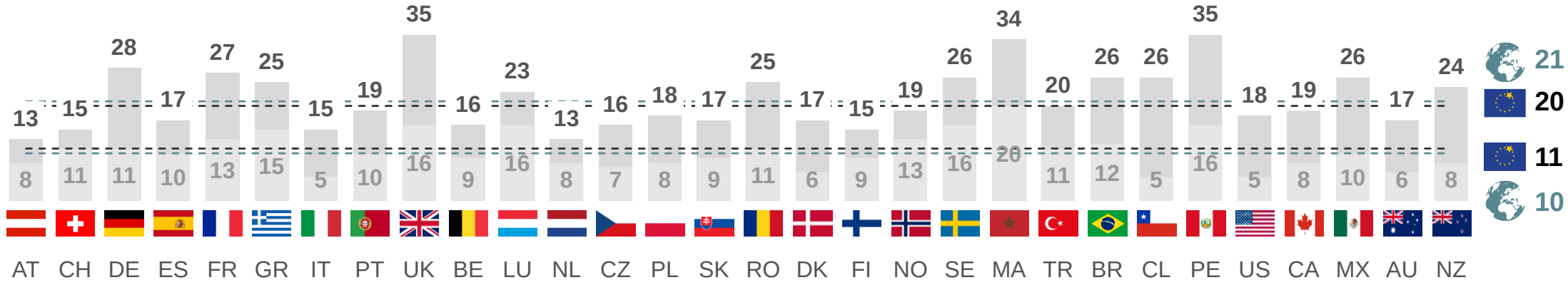
AN APP PROVIDED BY THE COMPANY TO BOOK MOBILITY SOLUTIONS

INSIGHT: The penetration of each mobility solution shows strong differences across markets.

In %

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



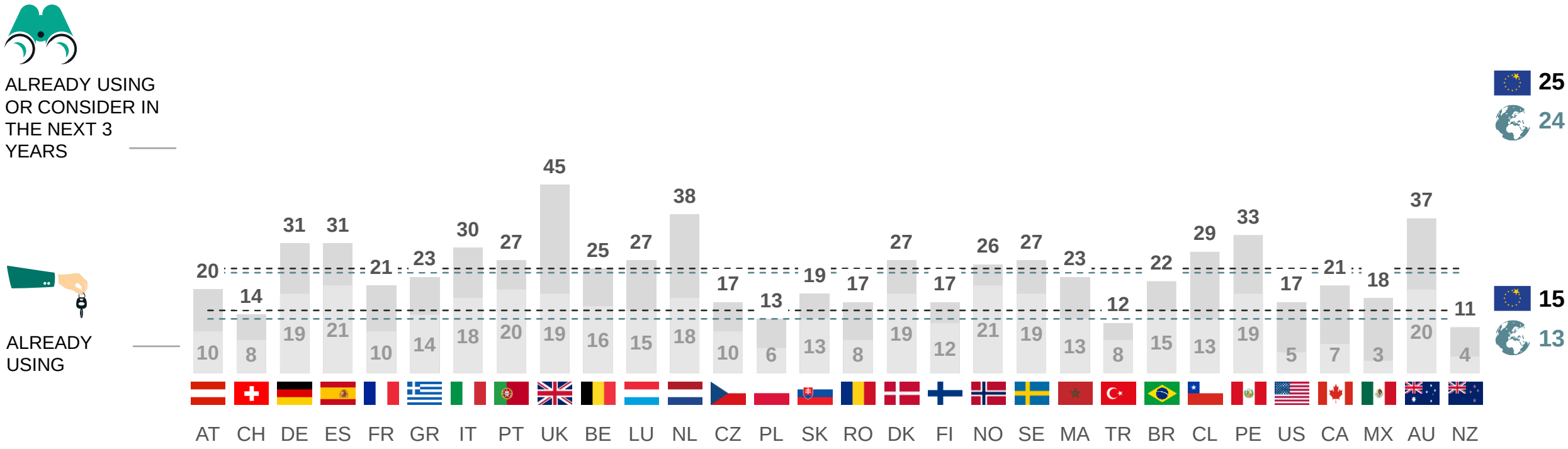
Arval Mobility Observatory

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

PRIVATE LEASE OR SALARY SACRIFICE IMPLEMENTATION

INSIGHT: The penetration of each mobility solution shows strong differences across markets.

In %



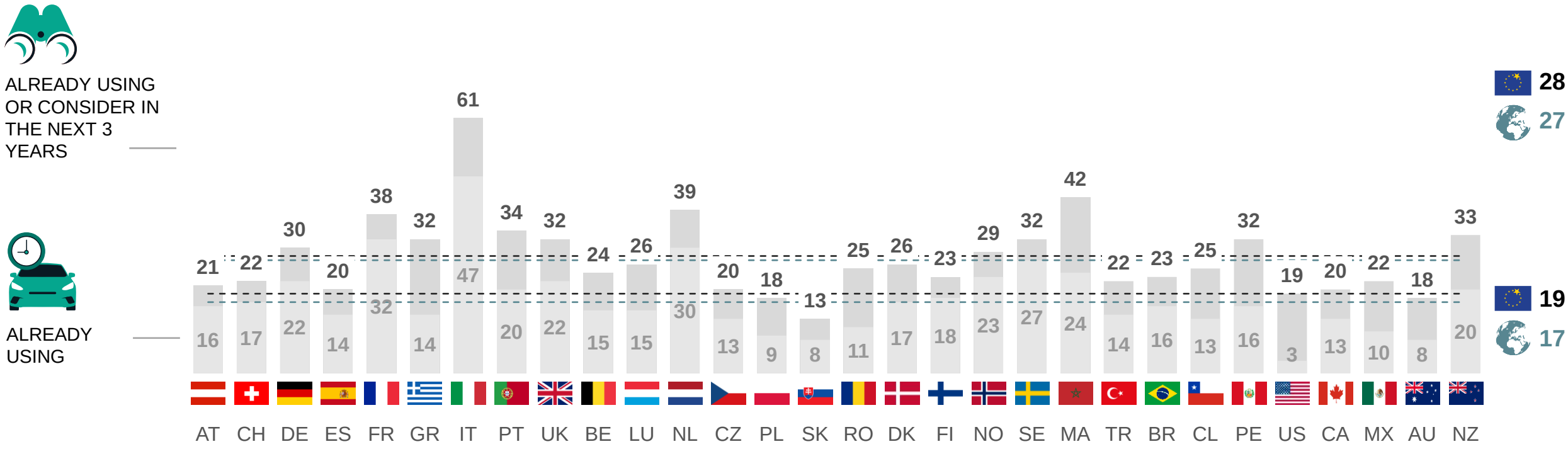
Arval Mobility Observatory

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

SHORT OR MID-TERM RENTAL VEHICLES IMPLEMENTATION

INSIGHT: The penetration of each mobility solution shows strong differences across markets.

In %



Arval Mobility Observatory

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

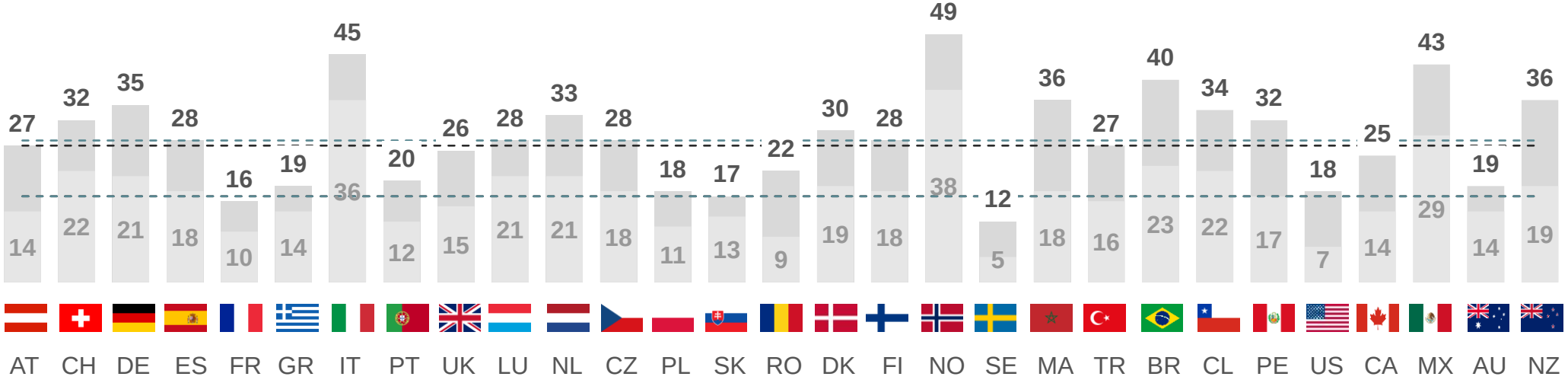
CAR OR CASH ALLOWANCE IMPLEMENTATION

INSIGHT: The penetration of each mobility solution shows strong differences across markets.

In %

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



27
28

17
17

Arval Mobility Observatory

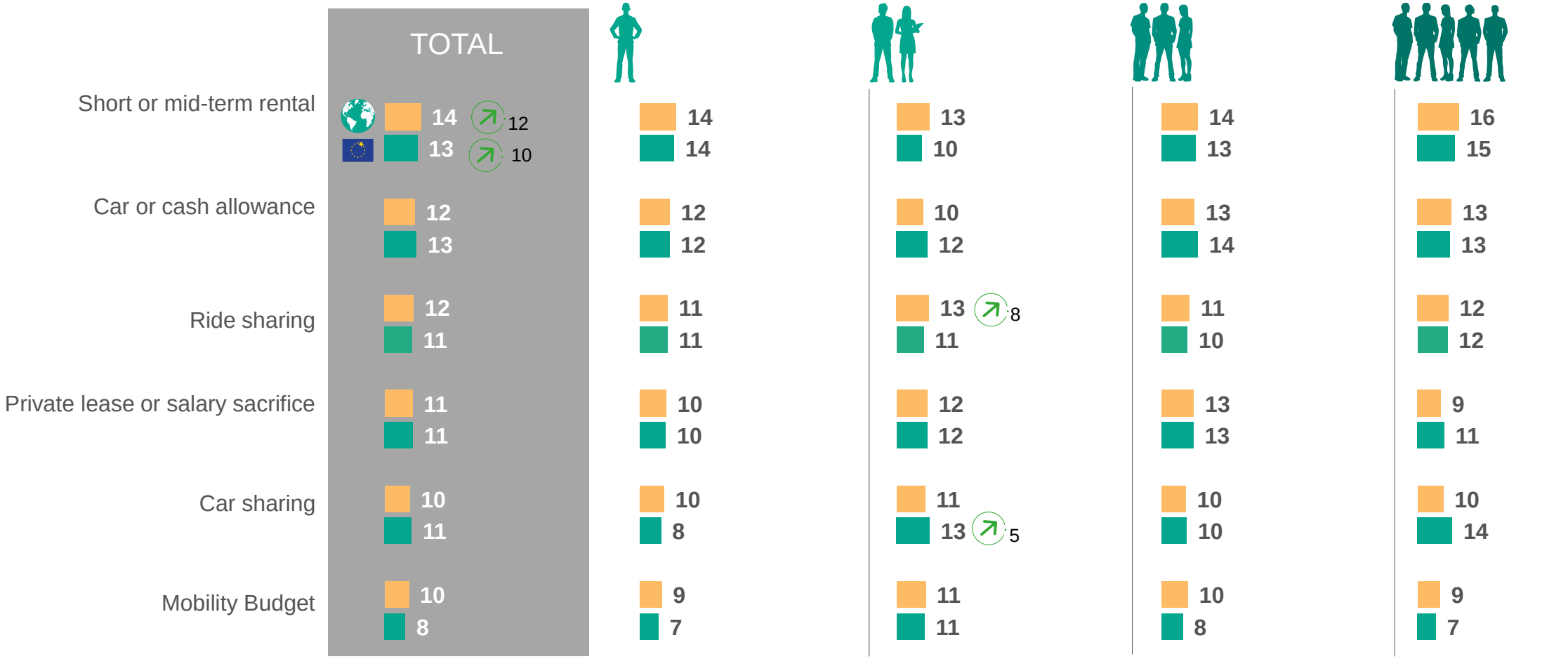
Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions

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

Certainly

INSIGHT: Among companies using or considering using these mobility solutions, these solutions are more seen as an add - on to the company fleet, with the likelihood to give up all or part of the fleet for mobility solutions remaining pretty low.

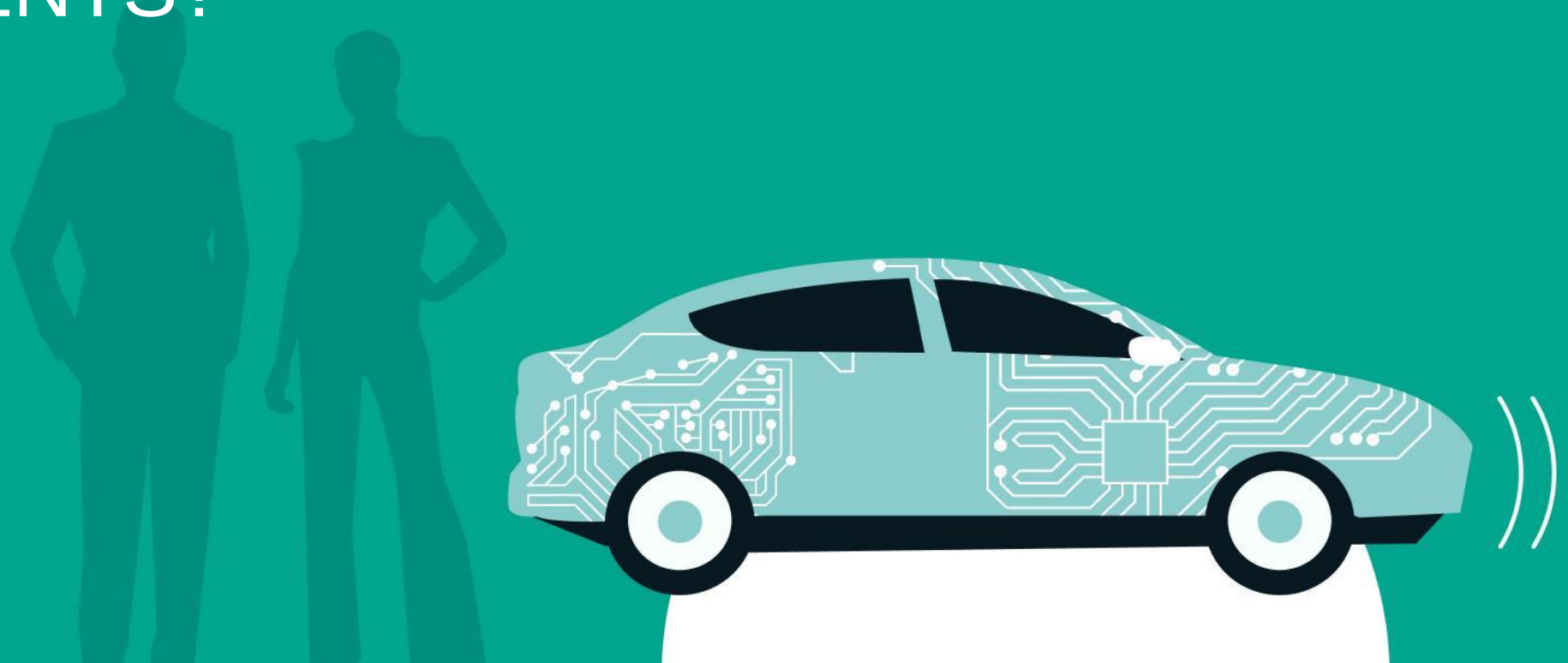
In %



Would you anticipate that your company would give up all or part of the company car fleet for such alternatives?
Basis: companies using or considering at least one mobility solution
Question asked to respondents that are aware of mobility solutions

7

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



PROPORTION OF COMPANIES USING CONNECTED VEHICLES

All vehicles

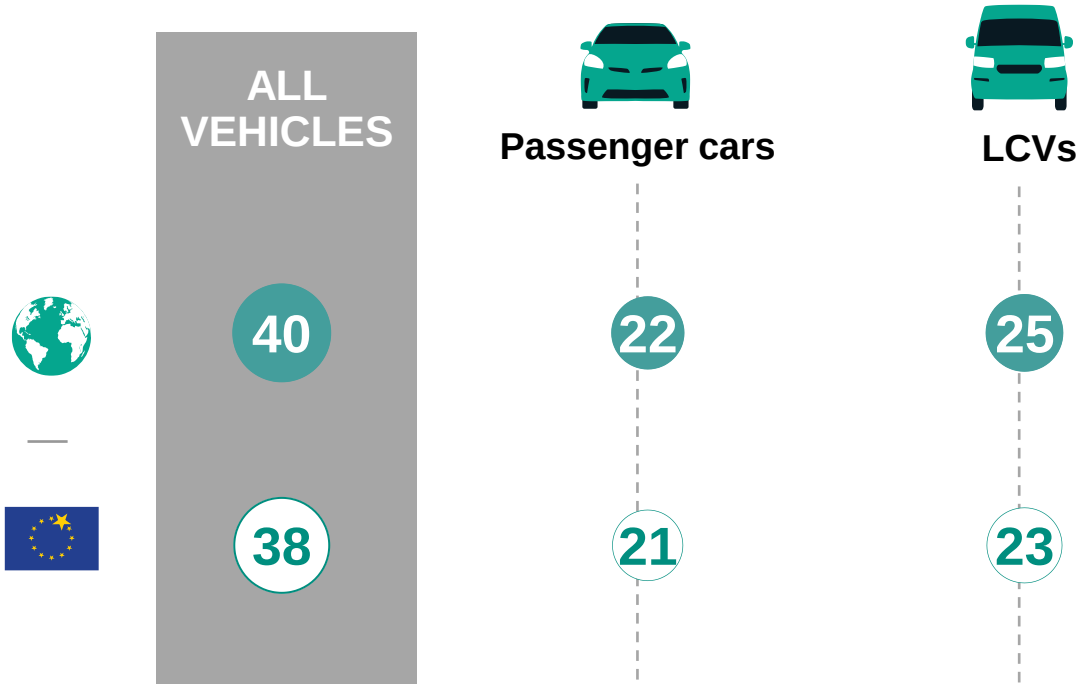
In %

Passenger cars + LCVs

HOW TO READ THE RESULTS ?

Overall, 40% of companies with fleet using connected vehicles for all or part of their fleet. 22% use connected vehicles for passenger cars, while 25% use connected vehicles for LCVs.

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



Change of definition in 2024. No comparison with 2023

Is your fleet connected thanks to a telematic tool?

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

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

Arval Mobility Observatory

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

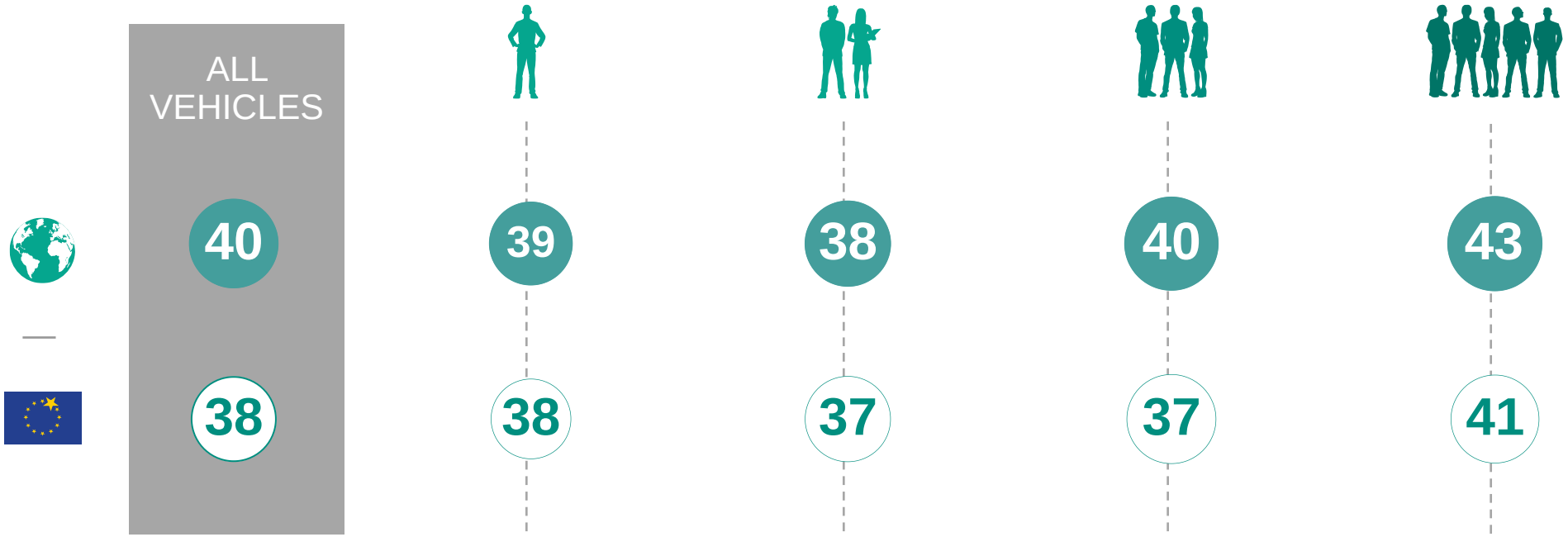
All vehicles

INSIGHT: The extent of connected fleets increases slightly with the size of the company: 42 % for smaller companies and 54 % amongst the largest companies.

In %

Passenger cars + LCVs

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



Arval Mobility Observatory

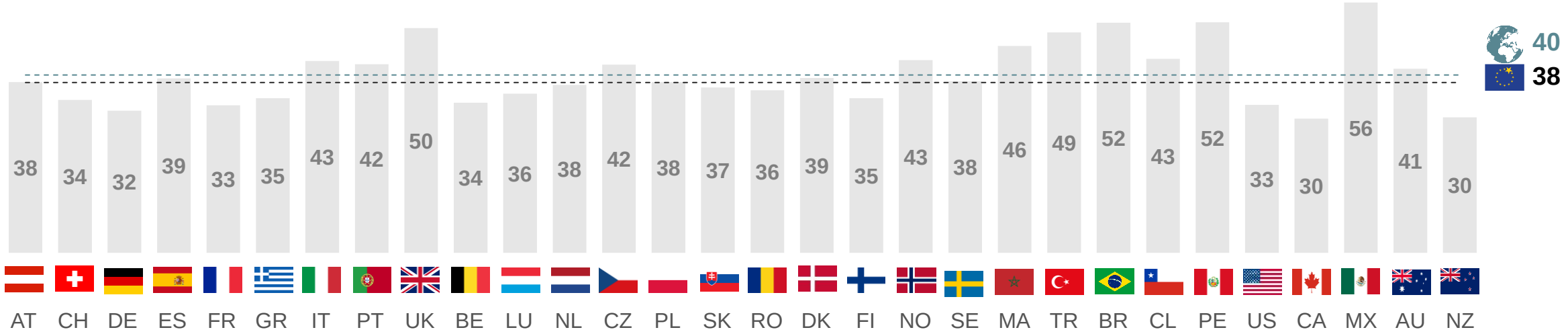
Change of definition in 2024. No comparison with 2023
Is your fleet connected thanks to a telematic tool?
Basis: companies with corporate passenger cars / companies with corporate LCVs

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

INSIGHT: Penetration of telematics is varying from country to country. It reaches over 50% in some LatAm countries (Brazil, Mexico, Peru) and in UK. The lowest rate is in New Zealand and Canada (30%), as well as in Germany (32%).

In %

Passenger cars + LCVs



Arval Mobility Observatory

Is your fleet connected thanks to a telematic tool?.
Basis: companies with corporate passenger cars / companies with corporate LCVs

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

All vehicles

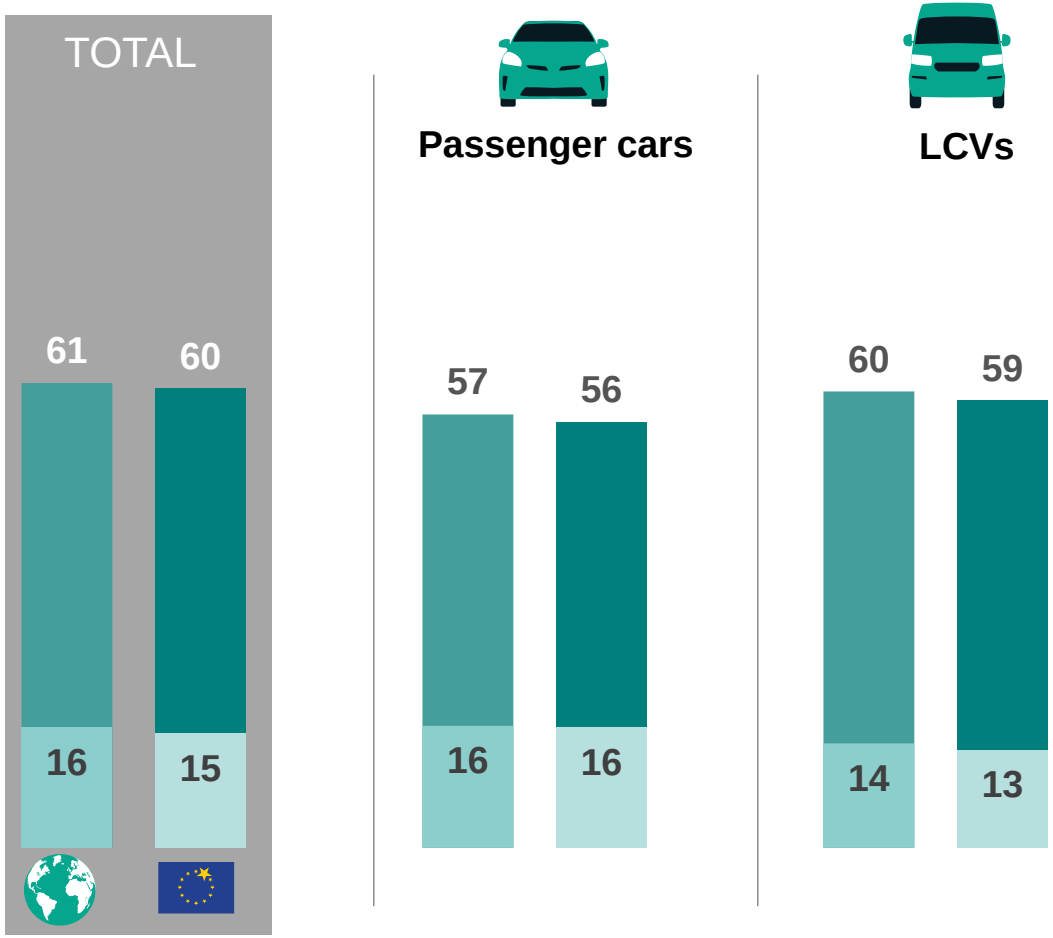
In %

HOW TO READ THE RESULTS ?
Overall, 61% of the companies that have connected vehicles are already using or consider using the data coming from the vehicle box thanks to a telematics platform in the next 3 years.
16% of companies are currently using the data.

Passenger cars + LCVs

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



New question added in 2024
Do you use or consider using the data coming from the vehicle box thanks to a telematics platform ?
Basis: companies with a fleet using connected vehicles for all or part of their fleet.

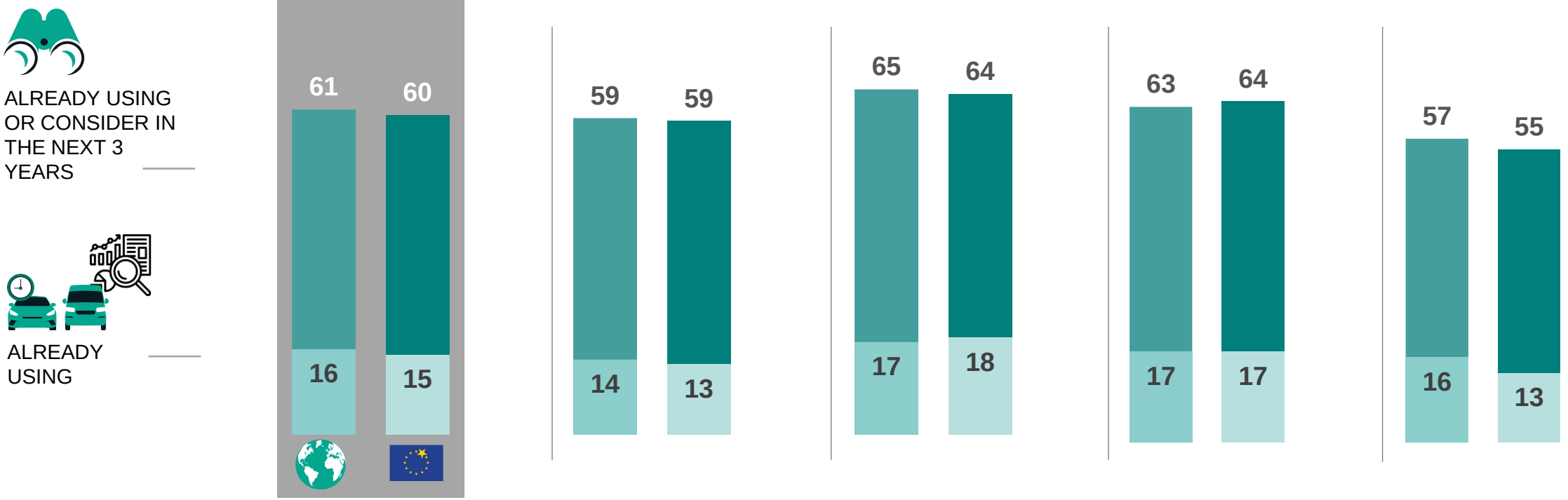
PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

All vehicles

In %

INSIGHT: Out 61% of the companies are already using or consider using the data coming from the vehicle box thanks to a telematics platform in the next 3 years, the mid segment is the one showing the highest potential for development. Small and Large companies are very close, with no big discrepancies between segments, both in term of already using and consideration for the next 3 years.

Passenger cars + LCVs



ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING

Arval Mobility Observatory

New question added in 2024

Do you use or consider using the data coming from the vehicle box thanks to a telematics platform ?
Basis: companies with a fleet using connected vehicles for all or part of their fleet.

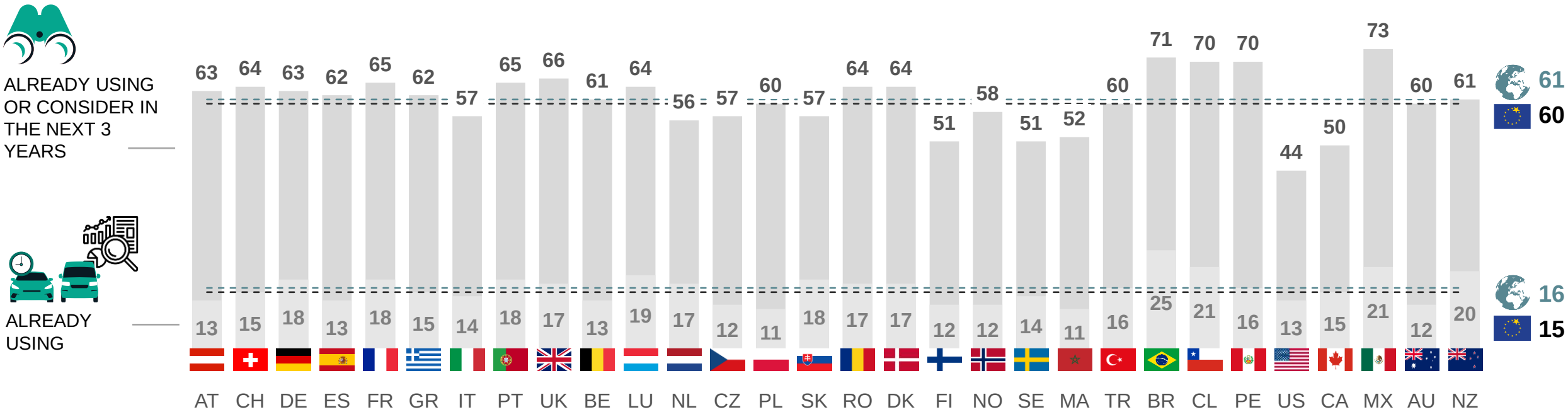
PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

All vehicles

In %

Passenger cars + LCVs

INSIGHT: While there are differences across countries that are already using or consider using the data coming from the vehicle box thanks to a telematics platform in the next 3 years, there also a high consistency – with 16 countries being equal or over the global average. The top countries are Brazil, Chile, Peru and Mexico, and lagging slightly behind are Canada and US



Arval Mobility Observatory

New question added in 2024

Do you use or consider using the data coming from the vehicle box thanks to a telematics platform ?
Basis: companies with a fleet using connected vehicles for all or part of their fleet.

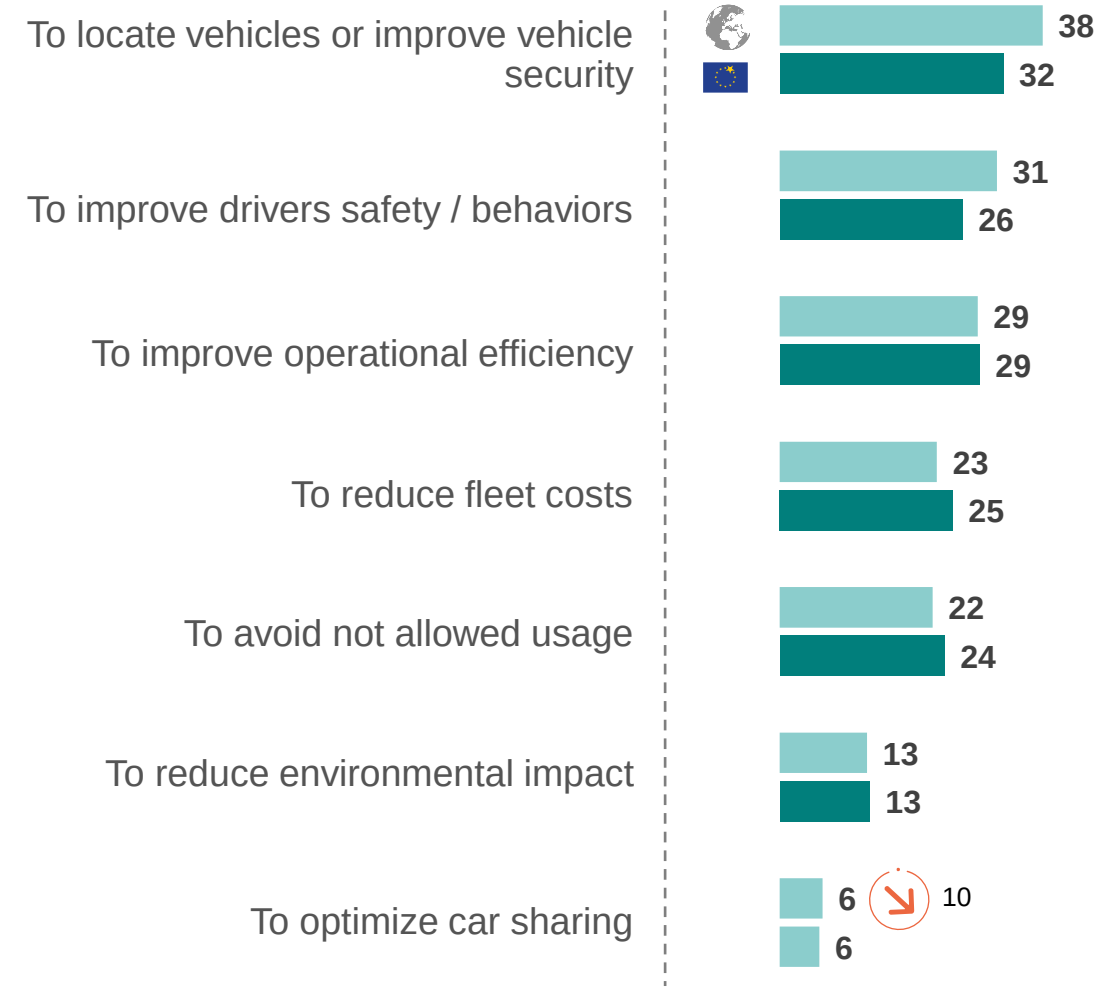
REASONS FOR USING DATA COMING FROM TELEMATICS

All vehicles

In %

Passenger cars + LCVs

INSIGHT: Among companies with connected vehicles, the main reasons to have connected vehicles, regardless of type, are to locate vehicles or improve vehicle security (38%), to improve driver safety (31%), to improve operational efficiency (29%) and to reduce fleet costs (23%).



What are the two main reasons why your you are using telematics data to manage your fleet?
Basis: companies already using data coming from Telematics

Thank you