



# MOBILITY AND FLEET BAROMETER 2022

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# CONTEXT AND METHODOLOGY





— 1

WHAT SHORT TERM  
SHIFTS ARE SHAPING THE  
MARKET IN THE CONTEXT  
OF COVID-19 CRISIS?



— 2

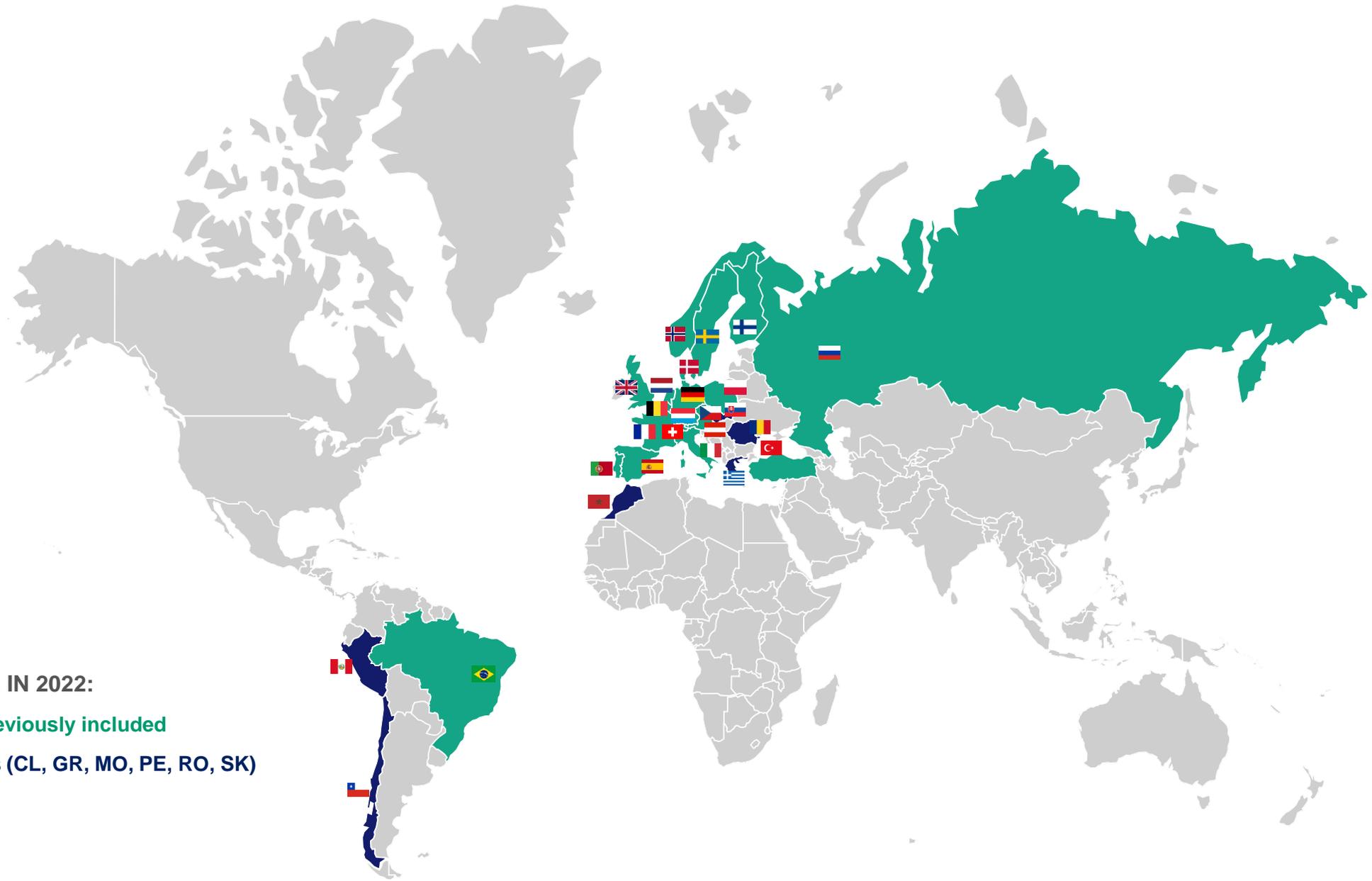
WHAT KIND OF VEHICLES  
WILL THE MARKET  
EXPECT IN 3 YEARS?



— 3

HOW WILL NEW MOBILITY  
SOLUTIONS AFFECT  
BUSINESS MODELS?

# SCOPE OF THE SURVEY



26 COUNTRIES IN 2022:

■ 20 countries previously included

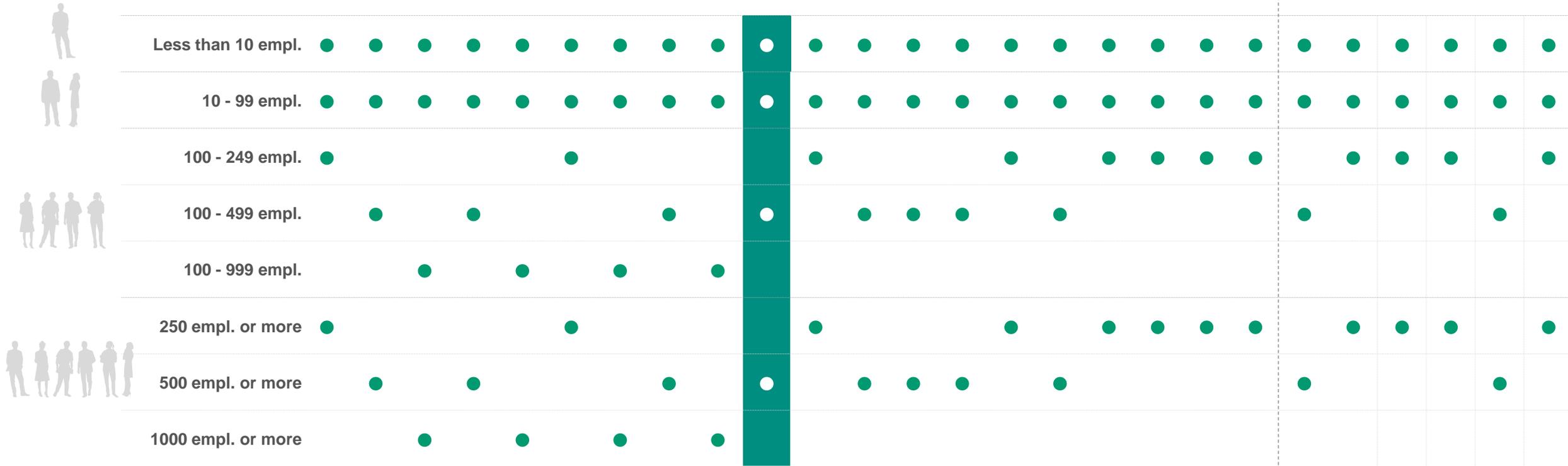
■ 6 new countries (CL, GR, MO, PE, RO, SK)

# COMPANY SIZE SEGMENT DEFINITION

WORLD

EUROPE

OUTSIDE EUROPE



# METHODOLOGY



DATA COLLECTION METHOD



FIELDWORK PERIOD



TARGET



QUOTAS



SAMPLE



DURATION OF INTERVIEW

## CATI CAWI SYSTEM

- Recruitment by telephone with a mixed data collection method, offering a possibility
- to answer to the rest of the Qnr by telephone,
  - or to complete the survey online via the link sent by email



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

COMPANY SIZE & SECTOR

5 896 through Europe  
1 680 out of Europe

10 minutes on average

7 576 Interviews in total

## READING NOTES ABOUT THE REPORT

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



XX

Significantly higher than 2021 year



XX

Significantly higher than 2020 year

XX = score 2021 or 2020



XX

Significantly lower than 2021 year



XX

Significantly lower than 2020 year

XX = score 2021 or 2020

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

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

# NUMBER OF INTERVIEWS CONDUCTED IN BELGIUM



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



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



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



Companies with 100 to 499 employees  
**80 INTERVIEWS**



Companies with 500 employees and more  
**57 INTERVIEWS**

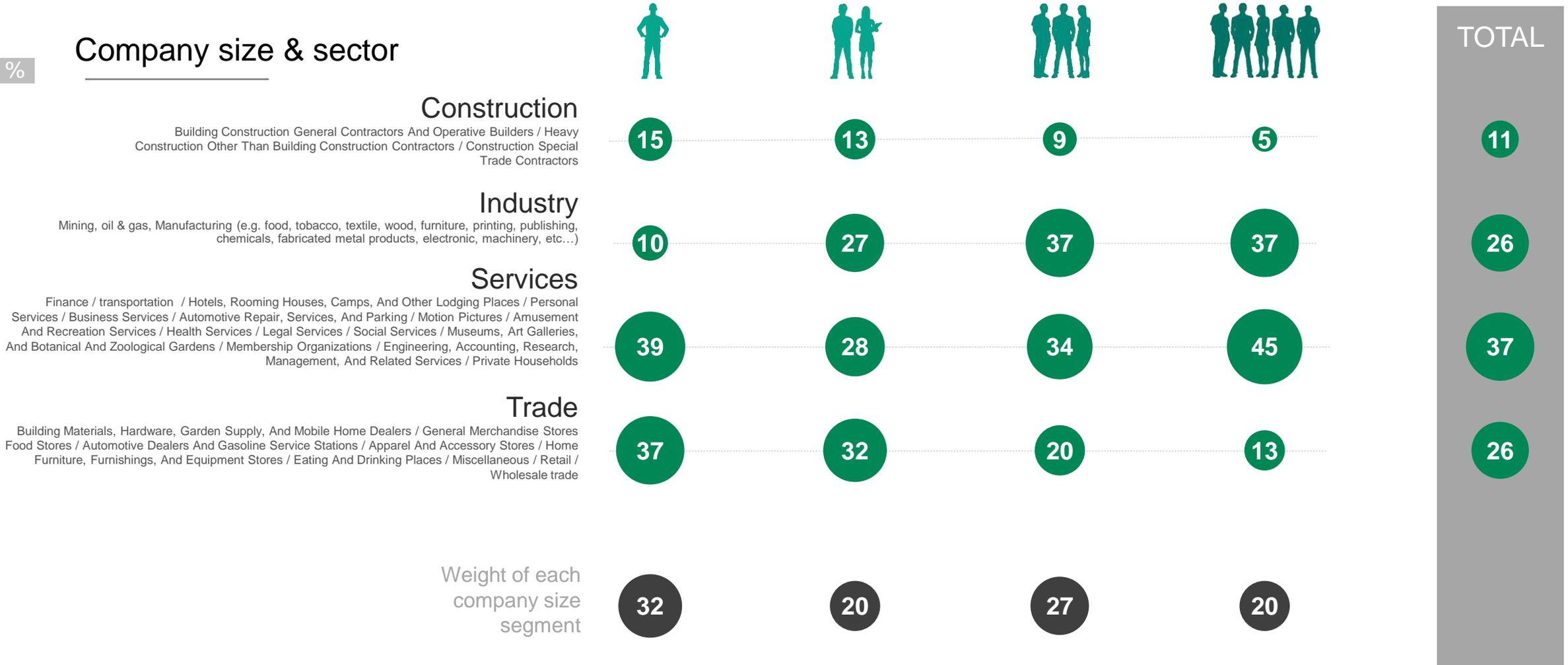


# SAMPLE STRUCTURE IN BELGIUM



In %

## Company size & sector



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

# MOBILITY ALTERNATIVES LIST AND DEFINITIONS



## **CORPORATE CAR SHARING:**

where an employee can make a vehicle reservation via an external solution



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



**RIDE SHARING :** where several employees travel in the same car to the same destination (Bolt, Faxe)



**AN APP TO BOOK MOBILITY SOLUTIONS PROVIDED BY THE COMPANY**



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



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



**PUBLIC TRANSPORT**



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

2

# EXECUTIVE SUMMARY



# INSIGHT 1: BELGIAN COMPANIES ARE CONFIDENT ABOUT THE FUTURE OF THEIR FLEETS IN THE CONTEXT WHERE THE IMPACT OF THE COVID CRISIS DECREASES

#1

## THE BELGIAN COMPANIES STAY CONFIDENT DESPITE ECONOMIC UNCERTAINTY

- This year, a large majority (93%) of Belgian companies expect that their fleet will remain stable or even increase, in line with the European trend.
  - Only 6% of companies anticipate the decrease of their fleet.
- While the situation linked to Covid crisis starts getting back to normal, the anticipated fleet growth is mainly driven by business development and, to a lesser extent, by the induced HR needs. In contrast, it is much less related to Covid situation: less emergency to provide a safe commute to the employees this year.
- Despite the development of homeworking, 85% of the companies indicate that this will not lead to changes in their mobility policies.
- In contrast to their European colleagues, Belgian fleet managers don't see a significant change in the average vehicle possession length, as it remains stable at 5 years.
- 41% of the Belgian companies consider introducing or increasing operating lease as a financing method for their fleets, which well above the European average of 34%.

# INSIGHT 2: BELGIAN COMPANIES POSITION IN THE EUROPEAN AVERAGE IN TERMS OF THE ADOPTION OF NEW FUEL TECHNOLOGIES – MUCH MORE WIDESPREAD FOR PASSENGER CARS THAN FOR LCV

#2

## MOST BELGIAN COMPANIES HAVE ALREADY ADOPTED ALTERNATIVE FUELS FOR PASSENGER CARS

- This year, **6 companies out of 10 have adopted at least one alternative fuel technology** (Hybrid, Plug-in hybrid or 100% BEV) **for their passenger cars**.
  - Hence, Belgian companies are in line with the European average.
  - **Hybrids and Plug-in hybrids (30%) dominate the market of alternative fuels**, while the adoption of 100% BEV is somewhat lower (13%).
  - The **reasons to electrify the passenger car fleets are very diversified**, relying on the environmental, economical, reputational (company image and CSR policies) factors as well as on the restrictions imposed by public policies.
- **The shift to the alternative fuels is more complicated for LCV:**
  - The **adoption of 100% BEV is much lower for LCV** than for passenger cars – only 8% of the companies use BEV LCVs, which in line with the European trend.
  - Besides, the expected share of ICE vehicles in the next 3 years is also higher for LCV (57%) than for passenger cars (49%).
- This year, with the development of the public infrastructure of charging points and the enlarging offer of 100% BEV models, Belgian fleet managers see fewer constraints than their European colleagues. To address charging difficulties that are still an issue for some companies, they **keep setting up charging points in their premises**.
- But despite these trends, the **companies are still rather conservative about the share of 100% BEV in their fleet in the near future (20% PC and 24% LCV)**.

# INSIGHT 3 : MOST BELGIAN COMPANIES HAVE ALREADY ADOPTED ALTERNATIVE MOBILITY SOLUTIONS, COMPLEMENTARY TO THEIR FLEETS

#3

## THE ALTERNATIVE MOBILITY SOLUTIONS ARE RATHER WIDESPREAD

- With more than 6 companies out of 10 having adopted at least one mobility solution, **Belgium is in line with the European average**.
  - To be noted, **these alternative solutions are mostly considered as add-ons to the current fleet** and are not dedicated to replace it.
  - However, the mobility budget might have a potential to replace (at least partly) some company vehicles in 3 companies out of 10.
- A quarter of the companies offer a **mobility plan** (or will offer one) to the employees. Over half of them state they will provide full transparency with regard to the budget and costs.
- Half of the companies are ready to introduce or increase **homeworking** for the employees.
  - On average, they plan to allow **3 days** of homeworking per week.
  - They expect this will **decrease** the number of **kilometers** driven with company cars by **28%**.

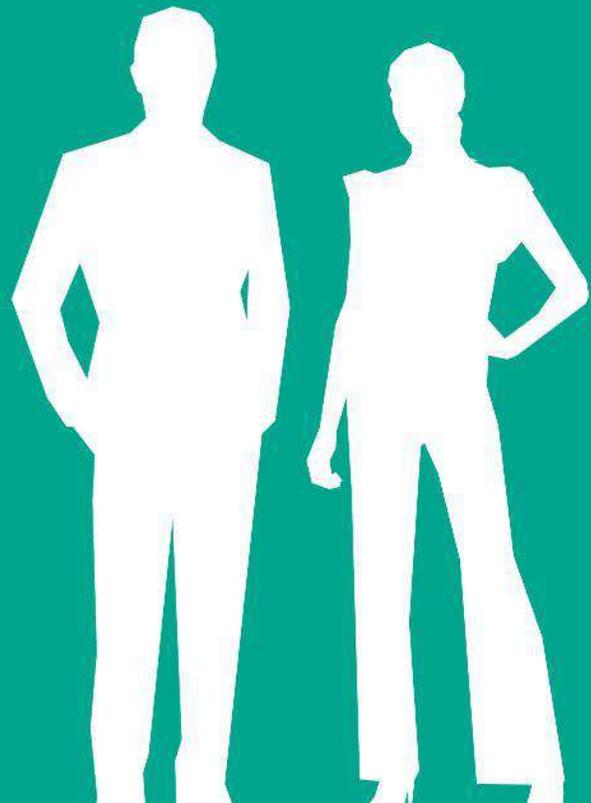
#4

## THE USE OF TELEMATICS IS FAIRLY WIDESPREAD

- **With regard to telematics, Belgian companies also position in the European average.** 3 Out of 10 companies use telematics in their fleets.
  - Telematics are more widespread in LCV fleets (24%) than for passenger car fleets (19%).
  - The equipped companies are mainly motivated by a possibility to **locate vehicles and improve their security**. This certainly is the case for smaller companies, since 48% of them cite this as the reason for using telematics.
- Finally, **actions to increase road safety**, such as additional equipment installation, smartphone blocking or even driver E-learnings, are **not a common practice** within Belgian company car fleets.

3

# WHAT ARE THE MAIN CHARACTERISTICS OF THE FLEETS?



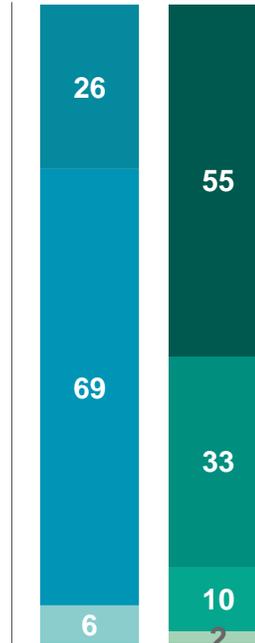
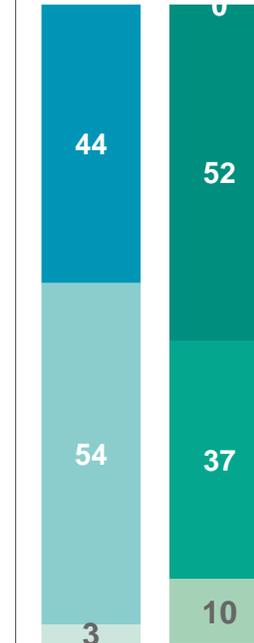
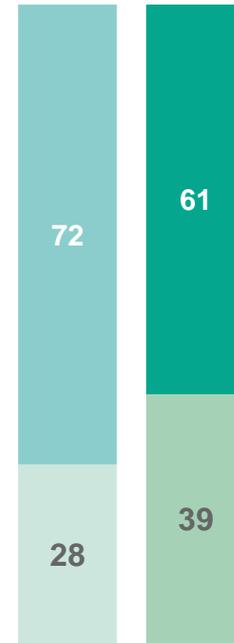
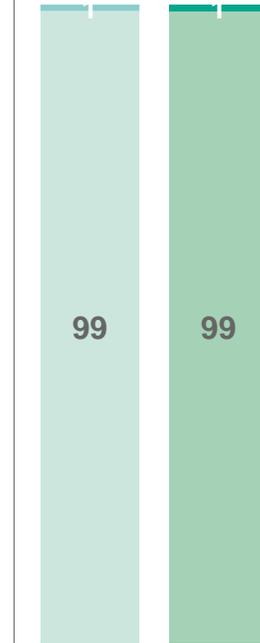
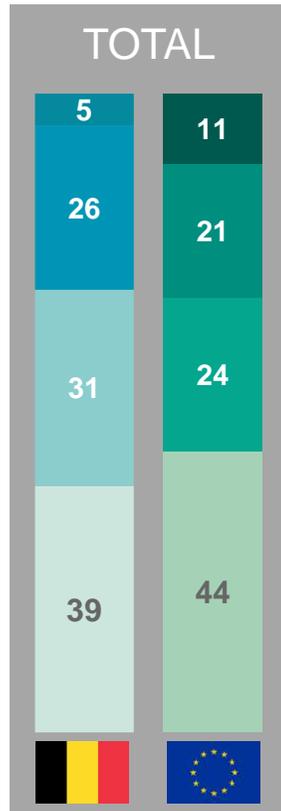
# NUMBER OF VEHICLES IN FLEET

In %



Passenger cars + LCVs

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

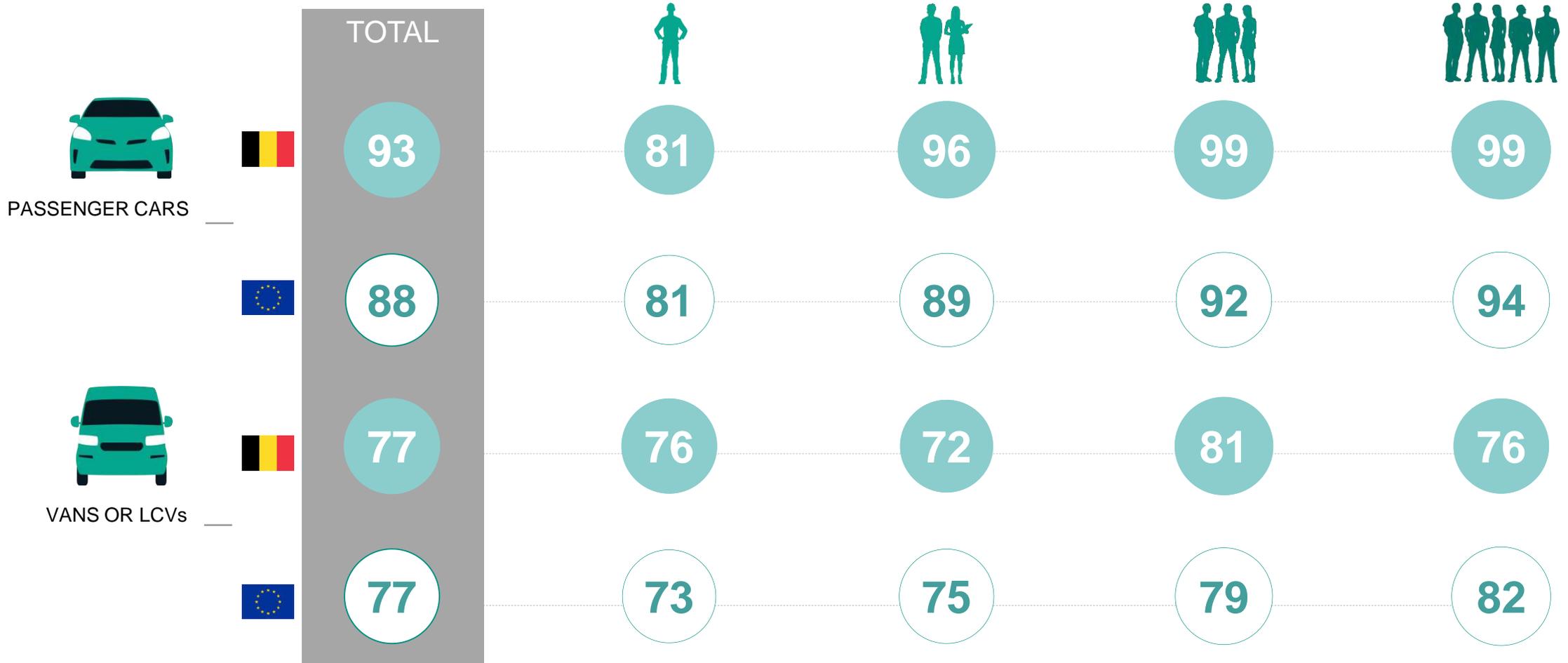


Can you please tell us the total number of vehicles of less than 3.5 tons in your fleet?  
Basis: companies with corporate vehicles = 100%

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

(among companies with at least one vehicle in fleet)

In %



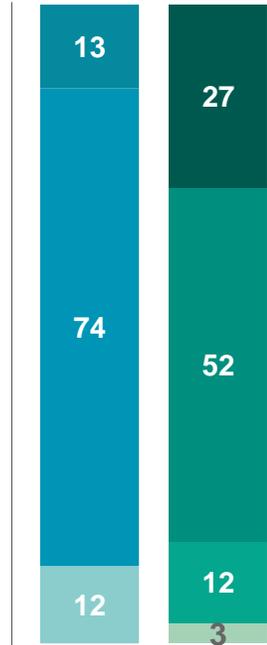
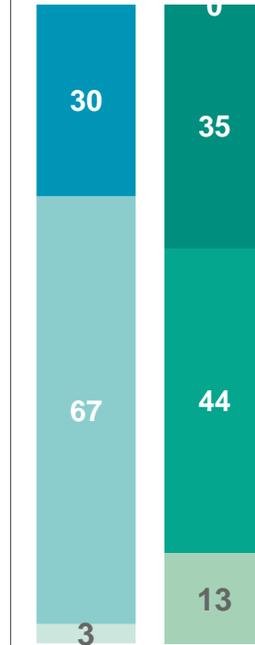
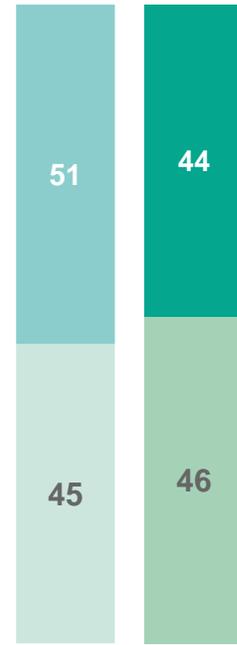
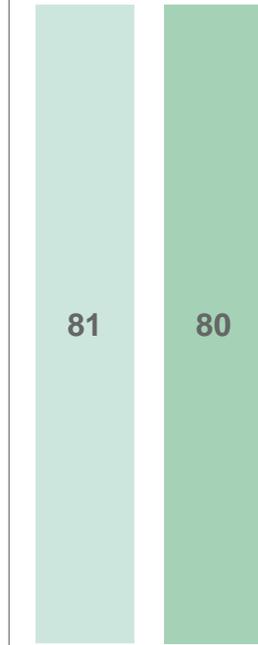
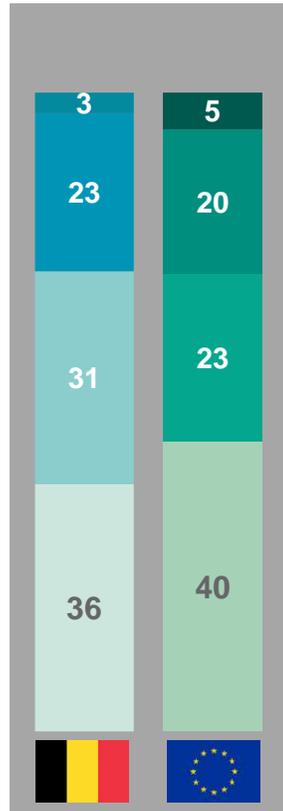
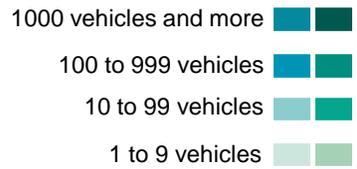
And can you please tell us the total number of cars in your fleet? / And can you please tell us the total number of LCVs or vans in your fleet?  
Basis: companies with corporate vehicles = 100%

# NUMBER OF PASSENGER CARS IN FLEET

In %



Passenger cars



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

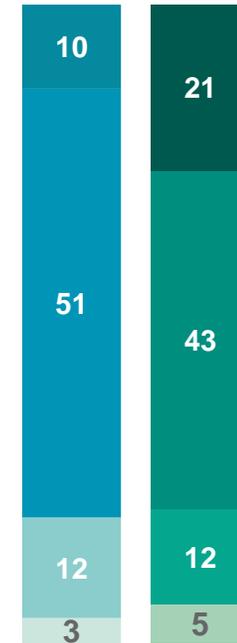
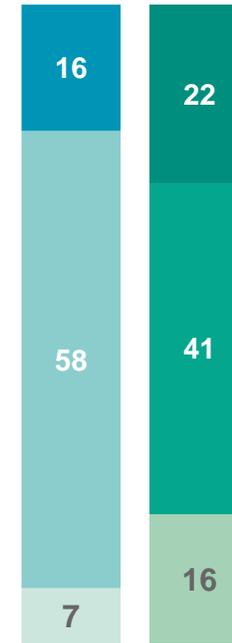
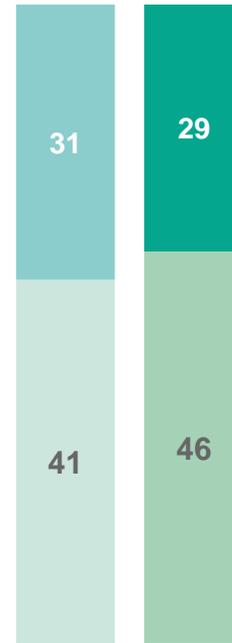
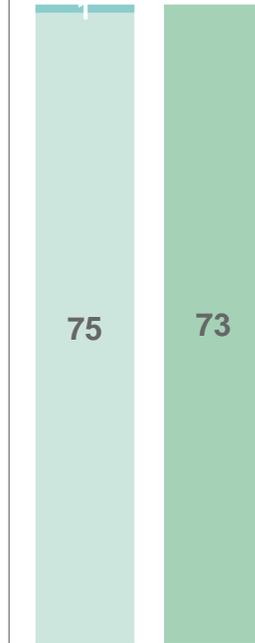
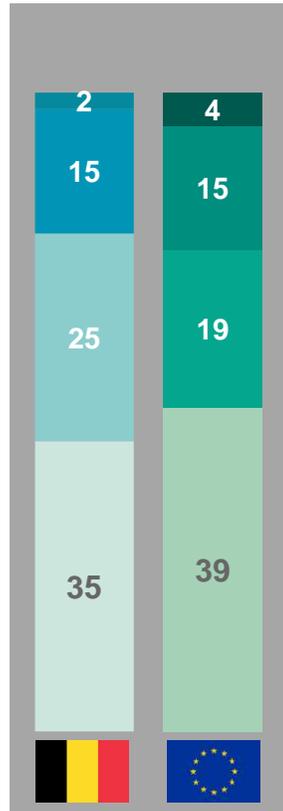
# NUMBER OF LCVS IN FLEET

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 corporate vehicles = 100%

# VEHICLES POSSESSION LENGTH



Passenger cars + LCVs

AVERAGE IN YEARS



TOTAL

5.1

5.6 ↑ 4.9



5.3

5.6 ↑ 5.3



5.4

5.9 ↑ 4.9



4.8

5.5 ↑ 4.7



4.9

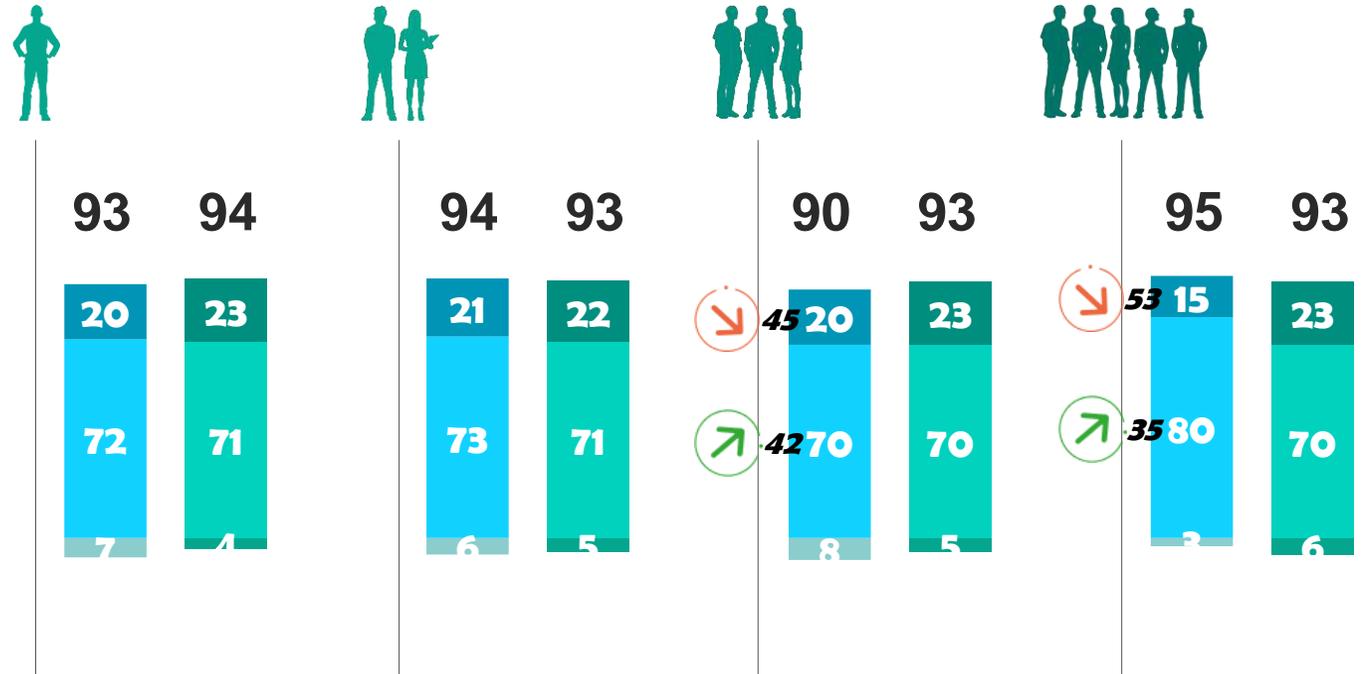
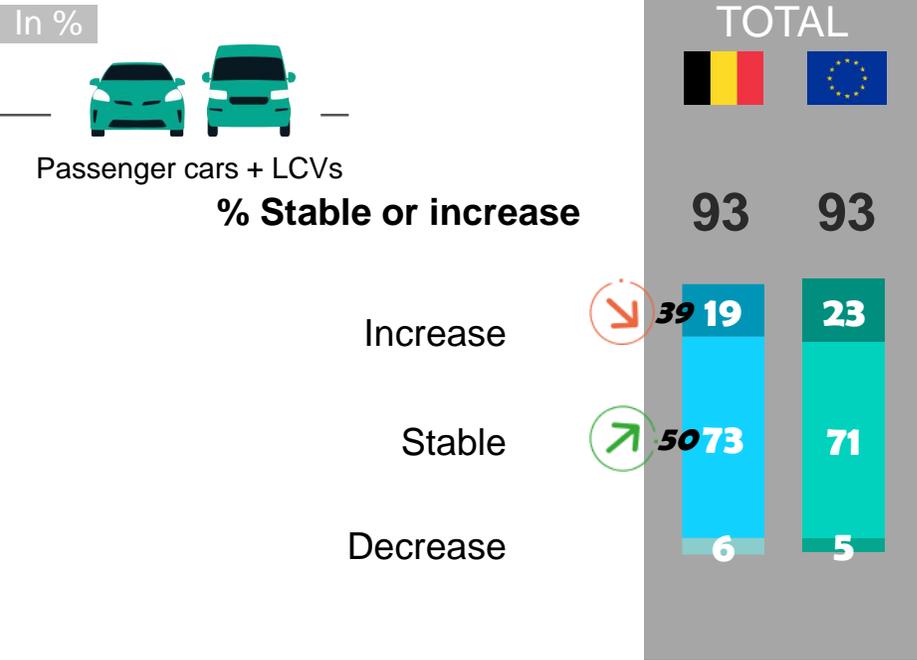
5.5 ↑ 4.4

*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 ?

In Belgium, 93% of the companies declare that in the next 3 years their company fleet will remain stable or increase.



**BALANCE in pts (INCREASE ⊖ DECREASE)**

2022	+13	+18	+13	+19	+15	+17	+12	+17	+12	+17
2021	+29	+35	+22	+22	+23	+31	+32	+43	+40	+50
2020	+25	+20	+20	+12	+37	+23	+24	+24	+26	+25



In the next three years, do you think that the total number of vehicles in your company fleet will increase, decrease or remain the same?

Basis: companies with corporate vehicles = 100%

# REASONS FOR FUTURE FLEET INCREASE

In %

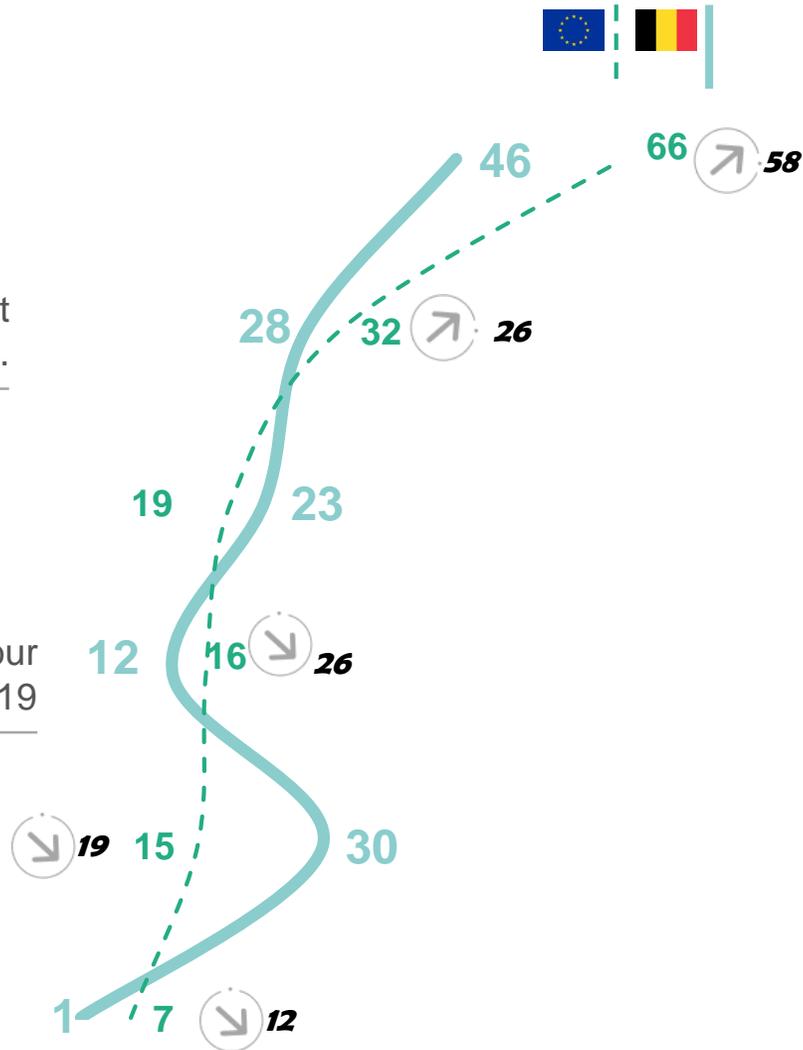


Passenger cars + LCVs

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

To provide a safe commute to your employees due to COVID-19

Because of tax decreases



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

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

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

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

# IMPACT OF THE COVID-19 CRISIS ON THE FLEET SIZE EVOLUTION

In %



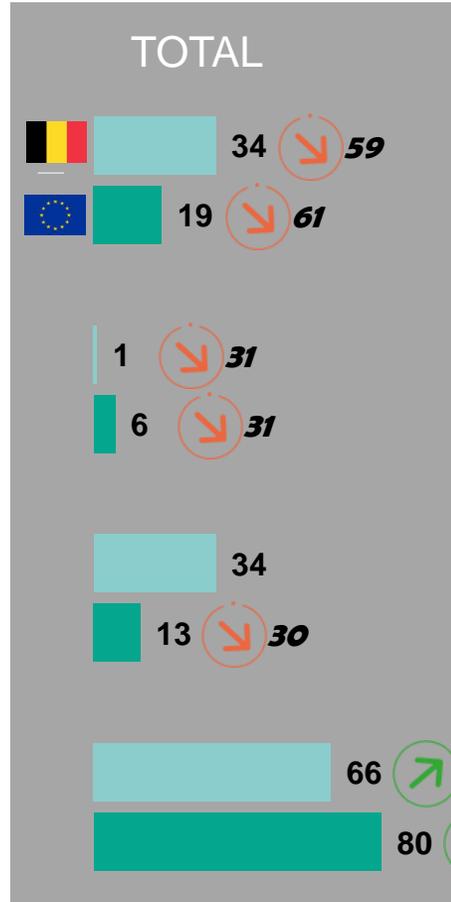
Passenger cars + LCVs

**NET YES**  
(totally + partially)

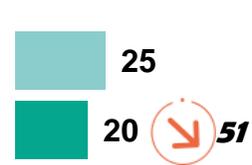
Yes, totally linked to the COVID-19 crisis

Yes, partially linked to the COVID-19 crisis

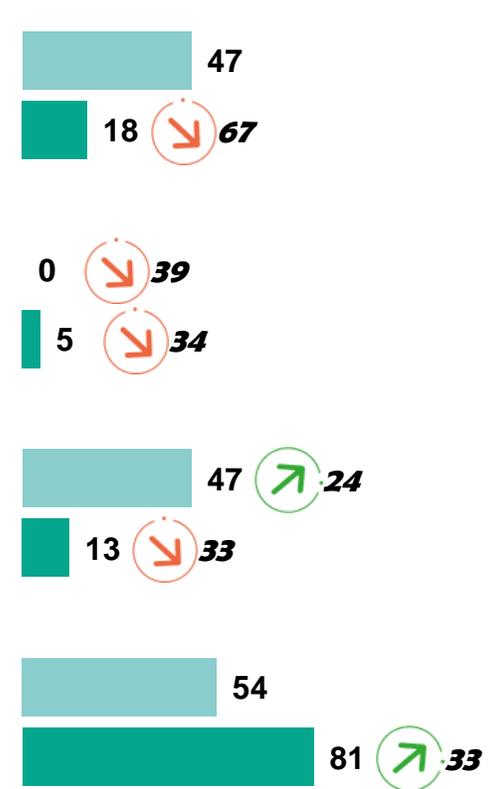
No, it is more a general tendency in our company



+



+



Is the evolution of the total number of vehicles in your company directly linked to the COVID-19 crisis ?  
Basis: companies expecting an increase or a decrease of the fleet

# MOBILITY POLICY ADAPTATION COINCIDING WITH HOMEWORKING

## HOW TO READ THE RESULTS ?

In Belgium, among the companies that changed or consider changing their mobility policy, 15% have already changed the company car policy in terms of mileage or models.

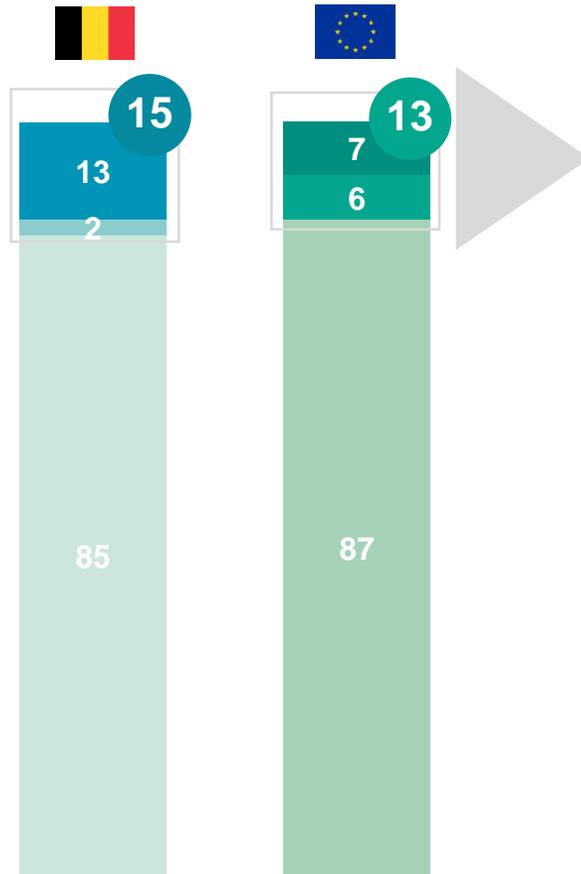
In %



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 ■

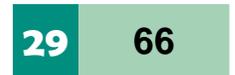


Basis: companies with corporate vehicles = 100%

- Already implemented ■
- Considered in the future ■



Changing the company car policy in terms of mileage or models



Developing alternative mobility solutions (such as bicycles, scooters...) or mobility packages



Introducing car-sharing for employees



Offering alternative mobility solutions to employees that are not eligible for a company car



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

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?

4

# HOW ARE COMPANIES FINANCING THEIR FLEET?



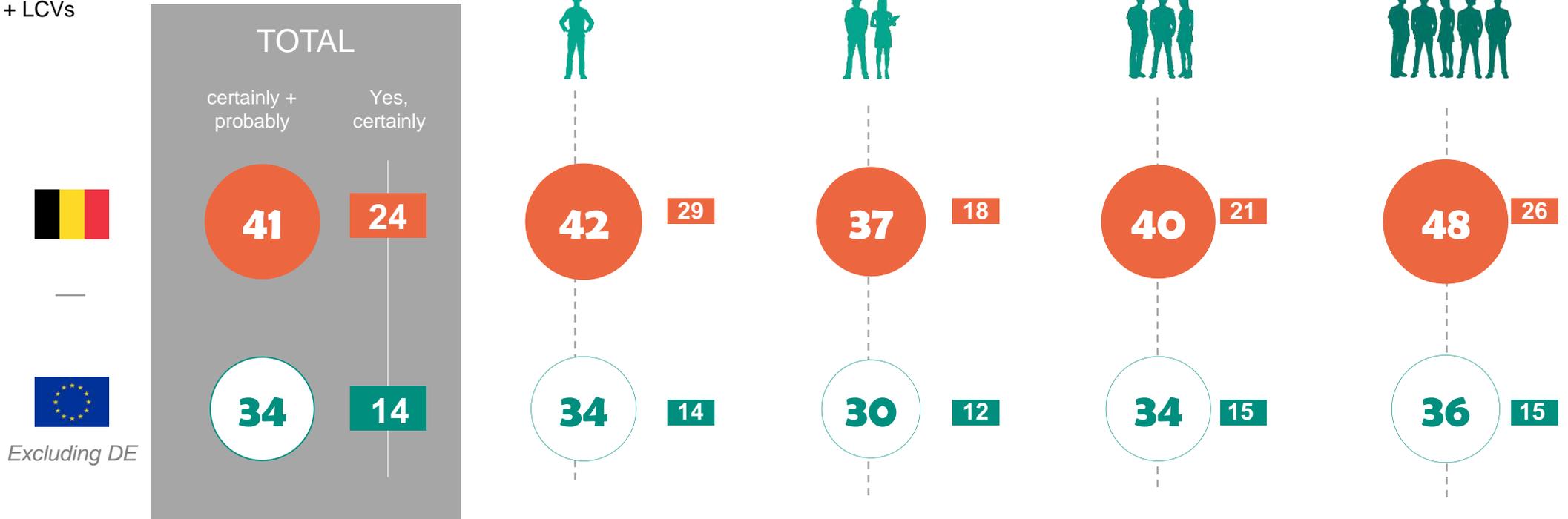
# INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATING LEASING

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

In %



Passenger cars + LCVs



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

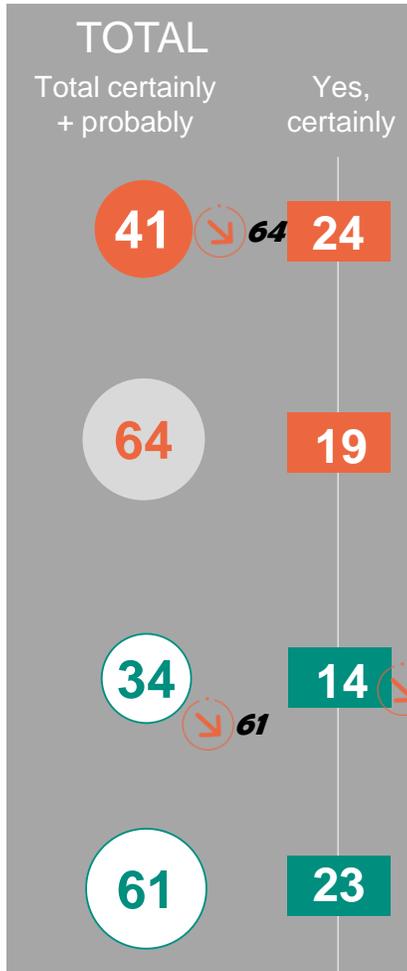
# EVOLUTION OF THE INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATING LEASING

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

In %



Passenger cars + LCVs



2022

2021



Excluding DE

2022

2021



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

5

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



# EXPECTED SHARE OF PETROL OR DIESEL VEHICLES (IN 3 YEARS)

(Without Hybrid vehicles)

In %

## HOW TO READ THE RESULTS ?

In Belgium in the next 3 years, 49% of the companies passenger car fleet and 57% of the light commercial vehicle fleet will be petrol or diesel vehicles.



New question added in 2022

In your opinion, what percentage of your passenger car fleet will be either petrol or diesel vehicles in 3 years (please don't consider hybrid vehicles)?  
 In your opinion, what percentage of your light commercial vehicle fleet will be either petrol or diesel vehicles in 3 years (please don't consider hybrid vehicles)?

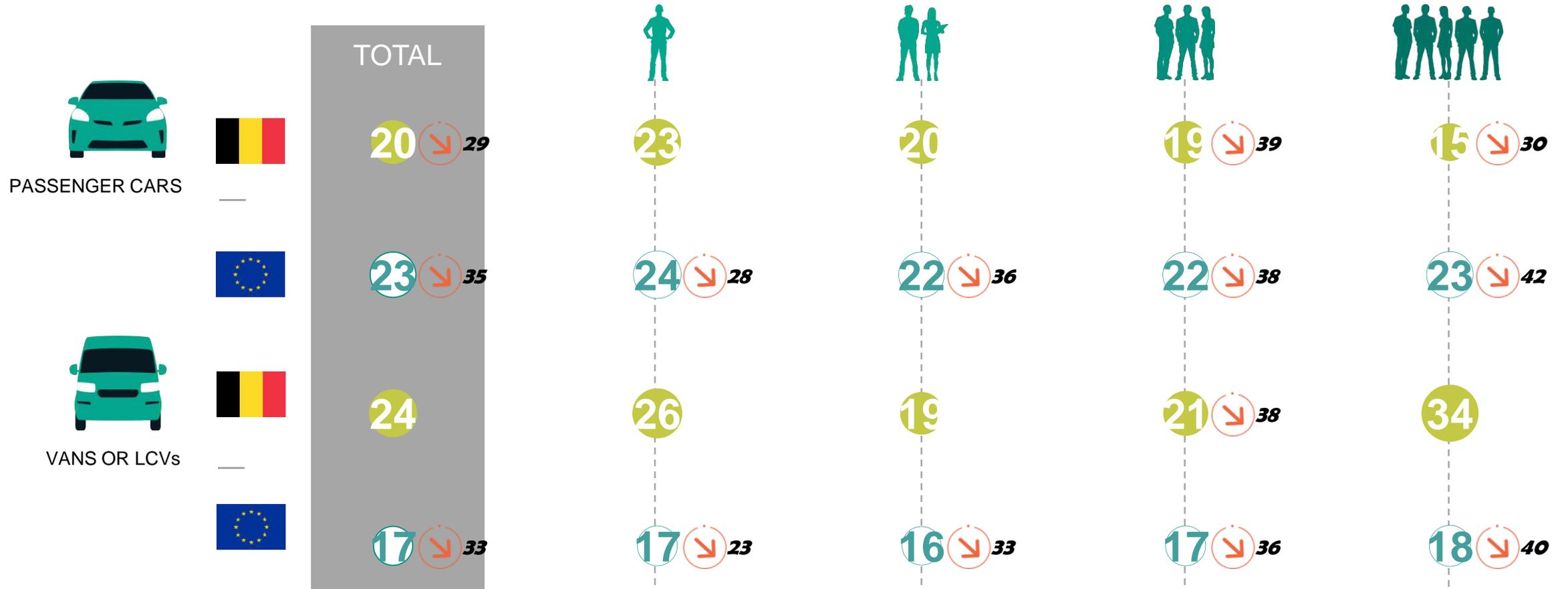
Basis: companies with passenger cars / companies with LCVs

# EXPECTED SHARE OF 100% BATTERY ELECTRIC VEHICLES (IN 3 YEARS)

In %

## HOW TO READ THE RESULTS ?

In Belgium in the next 3 years, 20% of the companies passenger car fleet and 24% of the light commercial vehicle fleet will be 100% Battery Electric Vehicle.



In your opinion, what percentage of your passenger car fleet will be 100% battery electric vehicles in 3 years (100% Battery Electric Vehicle)?  
 In your opinion, what percentage of your light commercial vehicle fleet will be 100% battery electric vehicles in 3 years (100 % Battery Electric Vehicle)?  
 Basis: companies with passenger cars / companies with LCVs

# CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES\*

(At least one technology among all types)

In %



Passenger cars

## HOW TO READ THE RESULTS ?

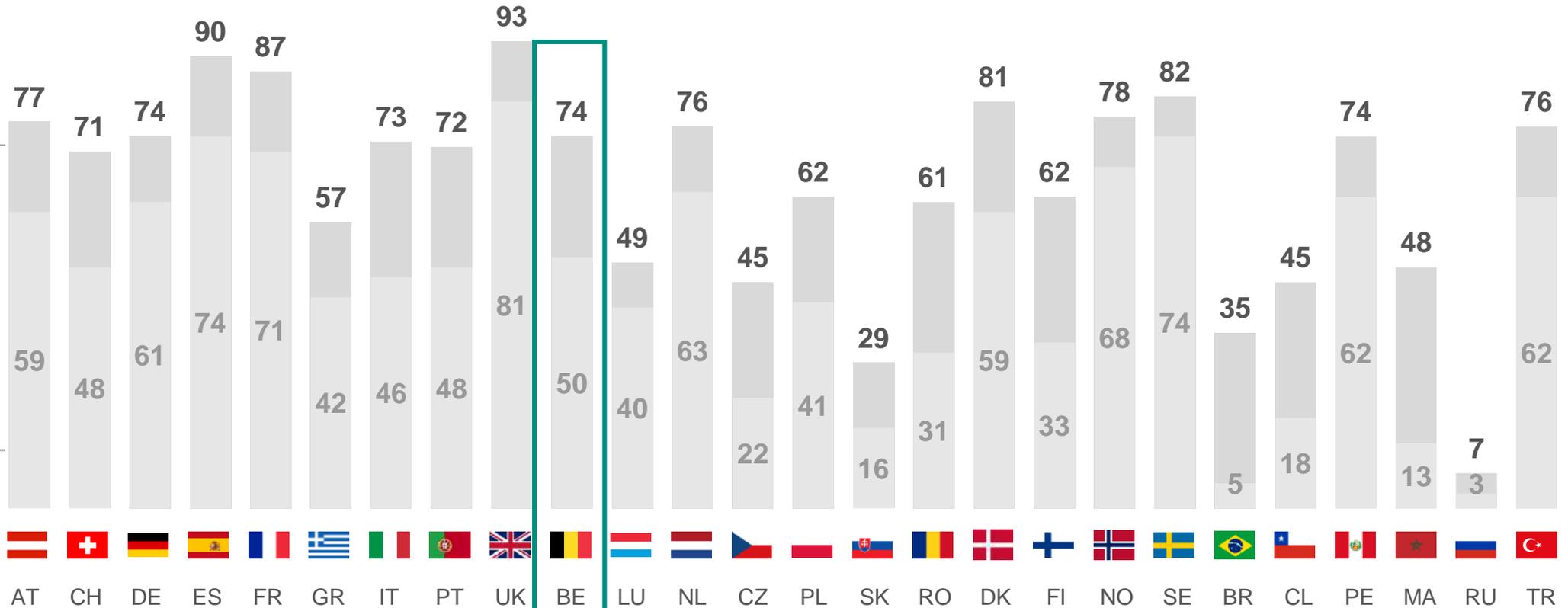
In Belgium, 74% of the companies are already using or consider to implement at least one alternative technology in the next 3 years. 50% of the companies are currently using at least one.



ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS



ALREADY USING



\*This question has been asked differently in 2021.

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  
32

# CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES\*

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

In %



Passenger cars

## HOW TO READ THE RESULTS ?

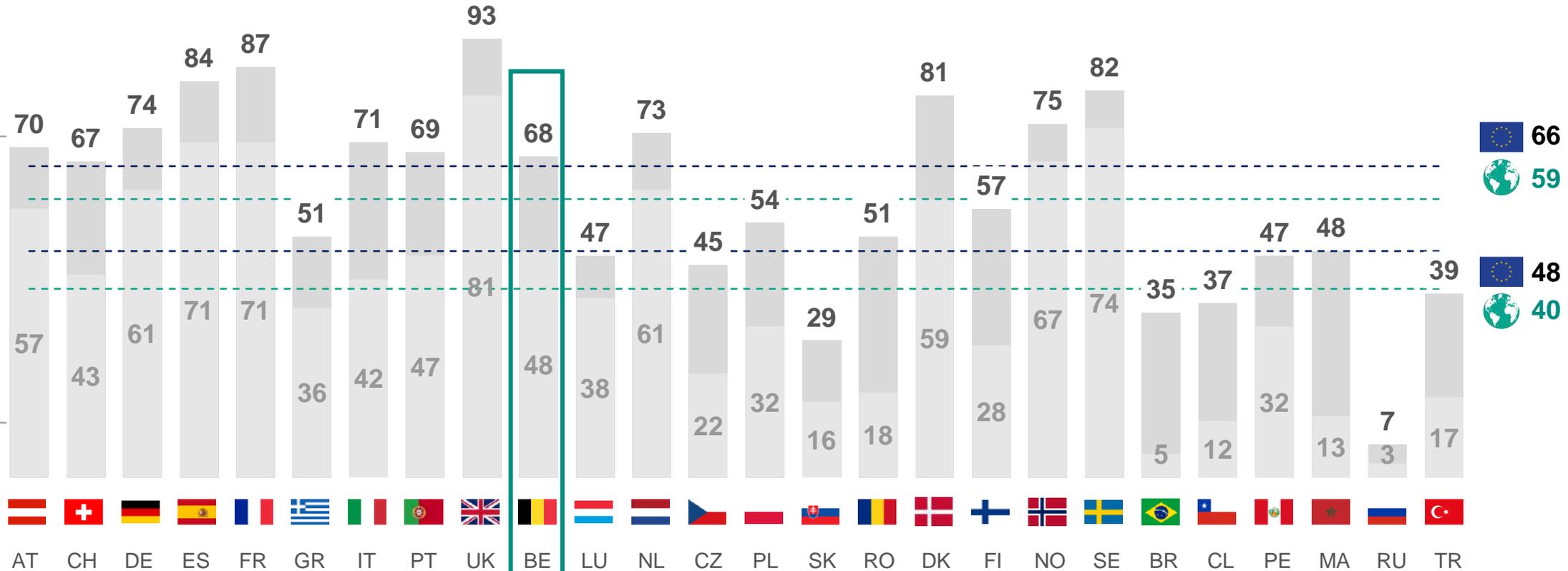
In Belgium, 68% of the companies are already using or consider to implement at least one alternative technology in the next 3 years. 48% of the companies are currently using at least one.



ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS



ALREADY USING



\*This question has been asked differently in 2021.

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 all types)

In %

Passenger cars

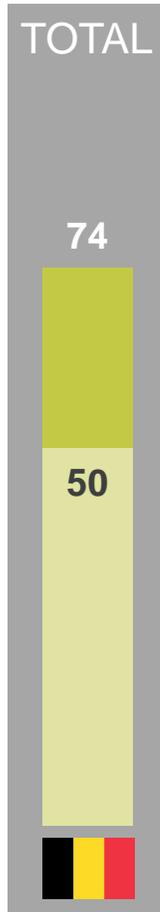


ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS



ALREADY USING

TOTAL



78

50



69

48



73

49



74

54

\*This question has been asked differently in 2021.  
 Amongst the following alternative fuel technologies, which ones do you currently use...?  
 Amongst the following alternative fuel technologies, which ones are you considering using...?  
 Basis: companies with passenger cars

# CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES\*

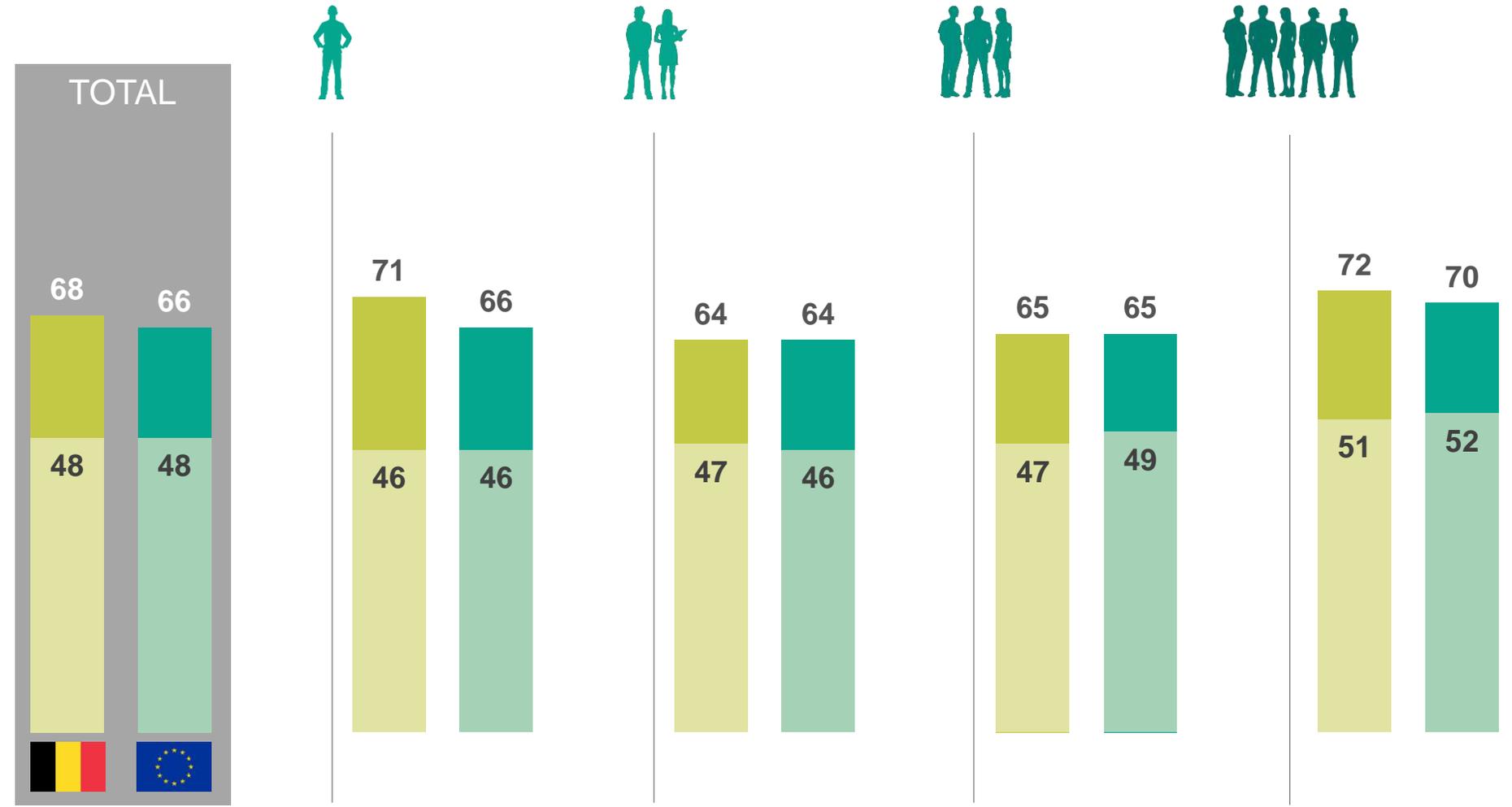
(At least one technology among HEV, PHEV, 100% BEV)

In %



ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

ALREADY USING



\*This question has been asked differently in 2021.  
 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 %



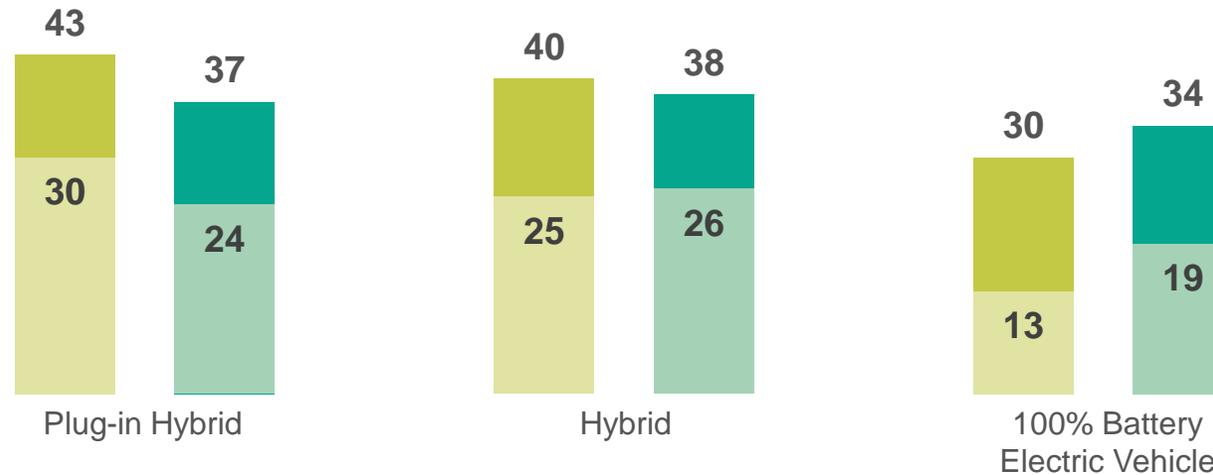
Passenger cars



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING



\*This question has been asked differently in 2021.

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

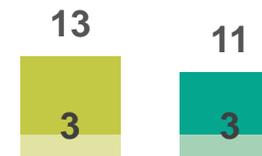


ALREADY  
USING



CNG\*

Benchmark: AT, CH, ES, IT, PT,  
BE, PL, GR, CL, PE, TK



Hydrogen\*

Benchmark: AT, CH, DE, ES, BE,  
LU, NL, PL, CL, PE

\*This question has been asked differently in 2021.

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

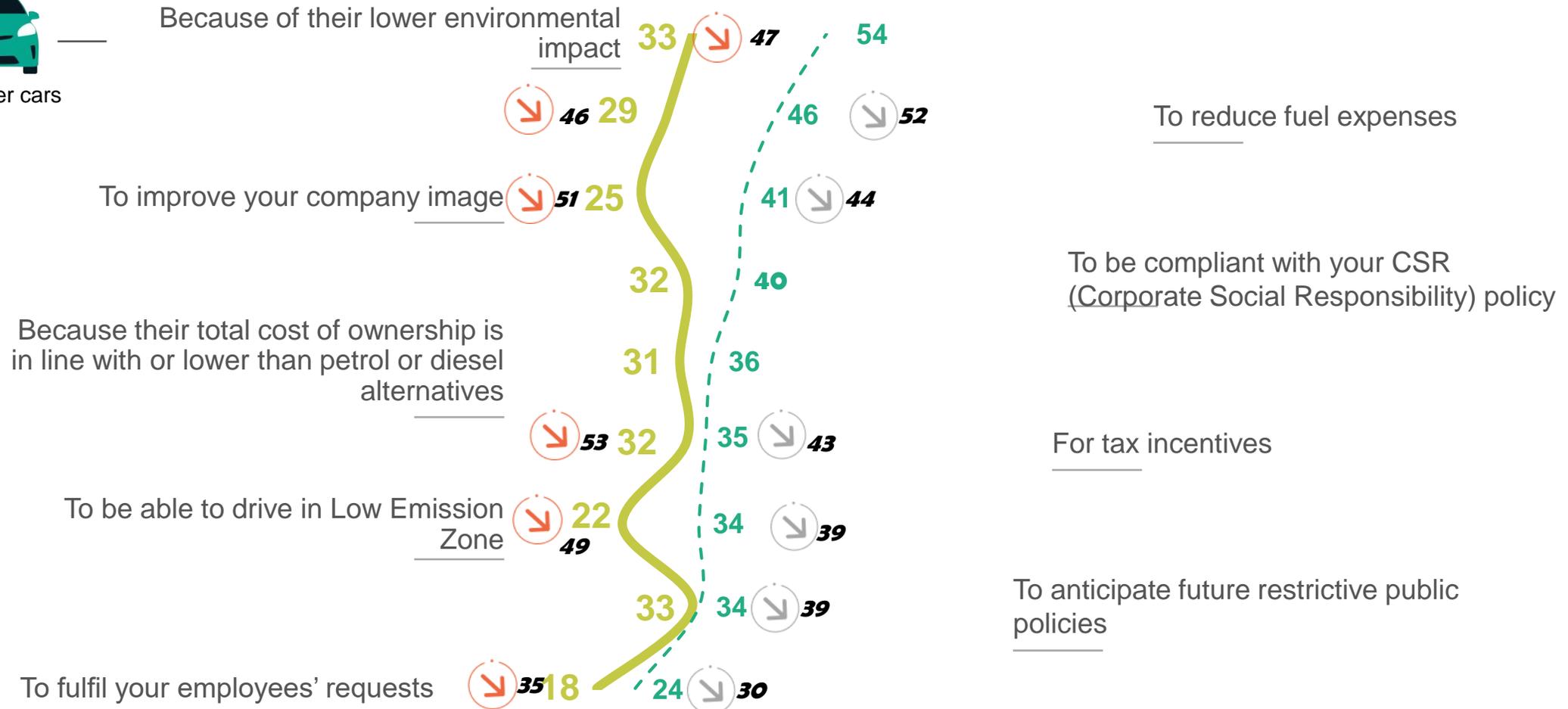
# REASONS FOR IMPLEMENTING OR CONSIDERING ALTERNATIVE FUEL TECHNOLOGIES

## Passenger car fleet

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

# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY\*

## LCV Fleet

In %



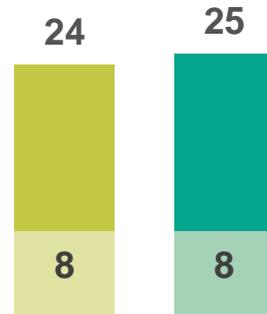
LCVs



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
IMPLEMENTED



100% Battery  
Electric Vehicle

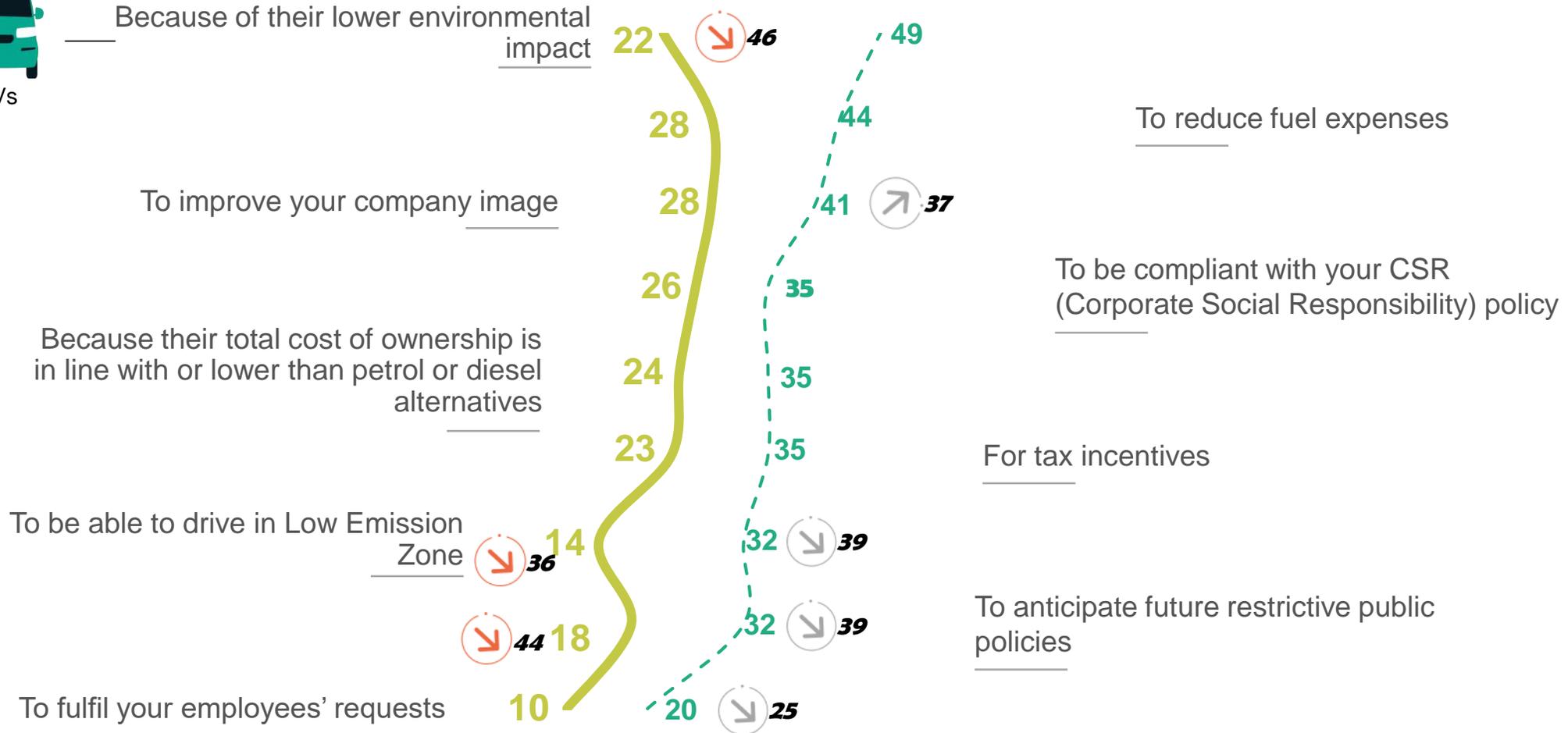
# REASONS FOR IMPLEMENTING OR CONSIDERING ALTERNATIVE FUEL TECHNOLOGIES

LCV fleet

In %



LCVs



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

5

# ENERGY MIX FOCUS PER ALTERNATIVE TECHNOLOGY



# HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY\*

In %



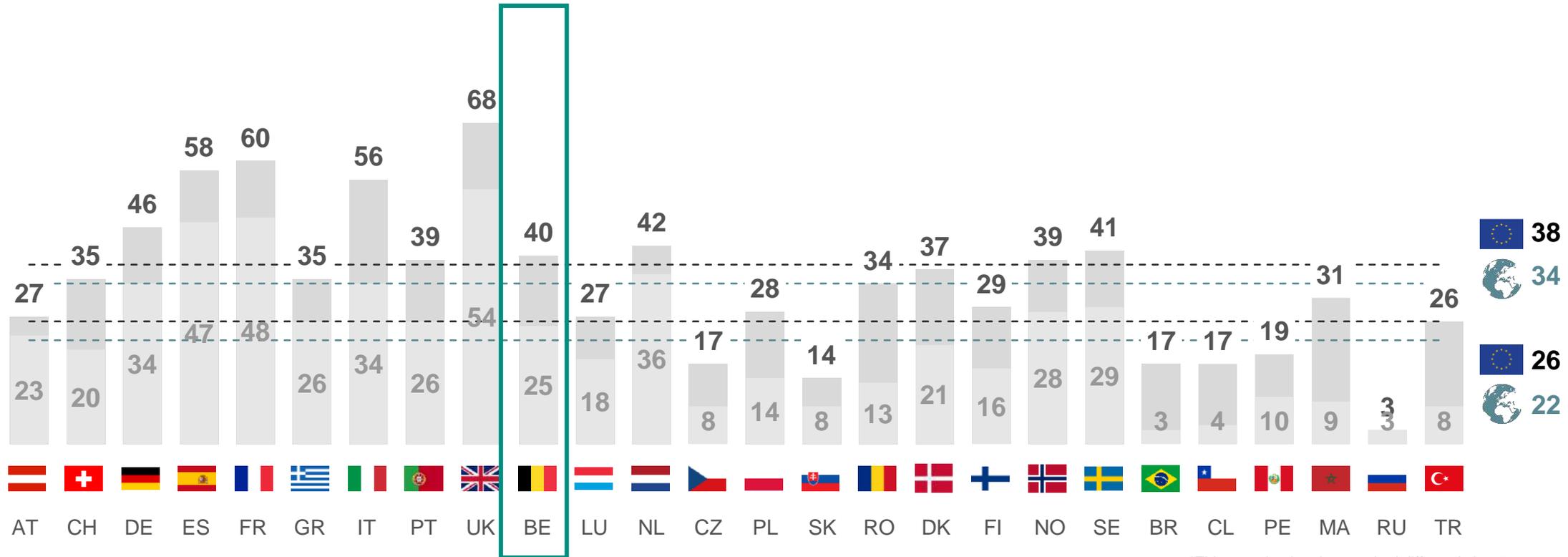
Passenger cars



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING



38  
 34  
 26  
 22

\*This question has been asked differently in 2021.

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

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

Basis: companies with passenger cars

# HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY\*

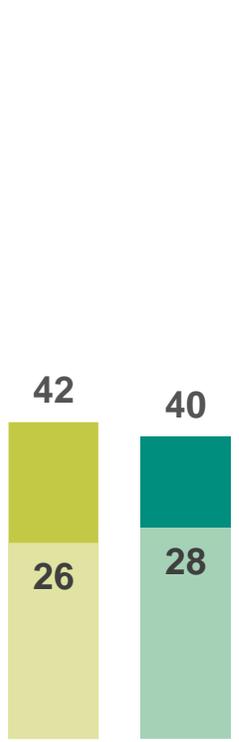
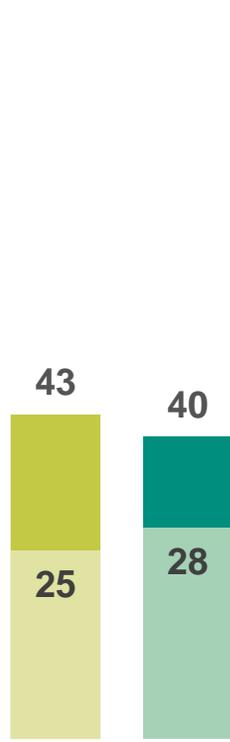
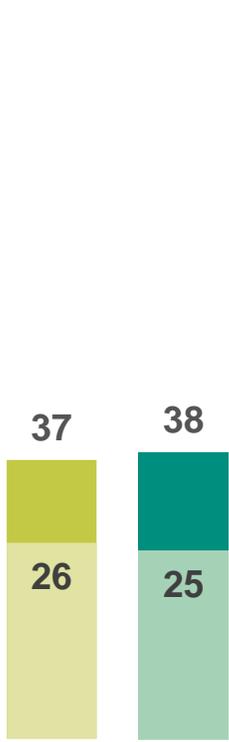
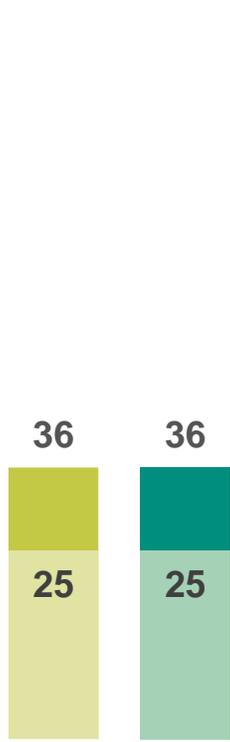
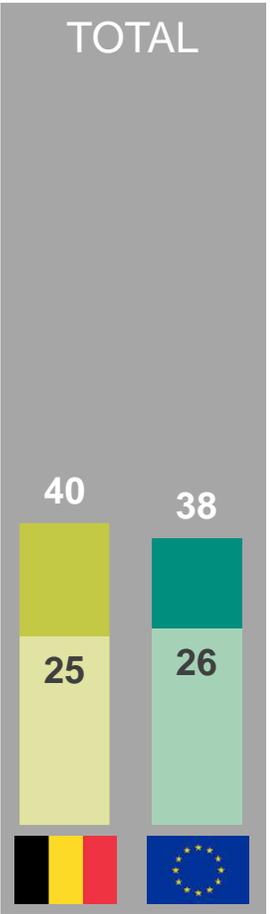
In %



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING



\*This question has been asked differently in 2021.  
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 %



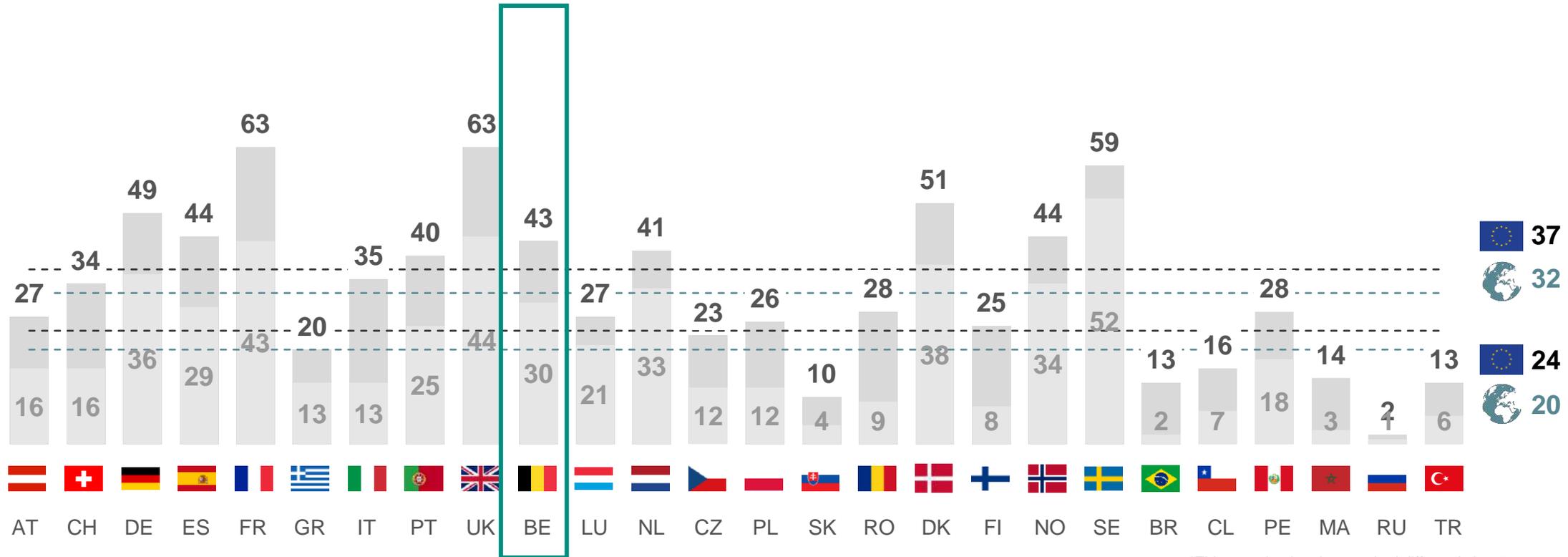
Passenger cars



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING



\*This question has been asked differently in 2021.

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 %

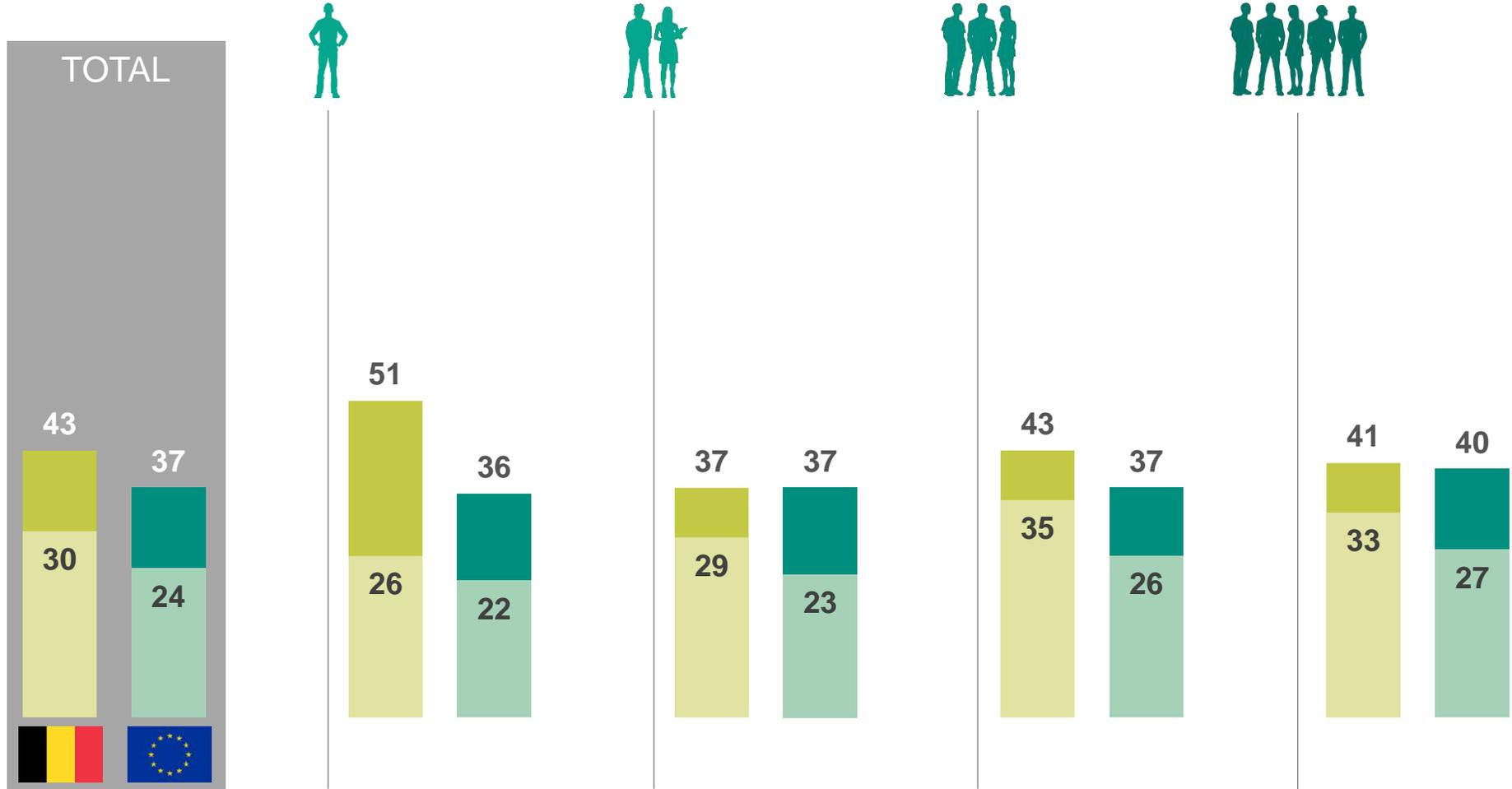
  
Passenger cars



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING



\*This question has been asked differently in 2021.  
 Amongst the following alternative fuel technologies, which ones do you currently use...?  
 Amongst the following alternative fuel technologies, which ones are you considering using...?  
 Basis: companies with passenger cars

# 100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY\*

In %



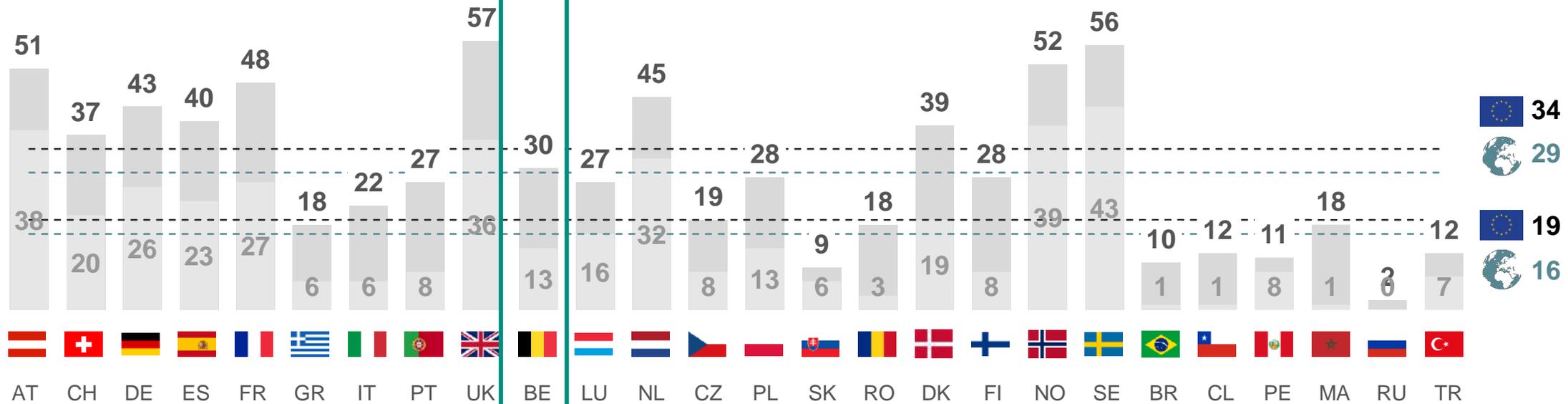
Passenger cars



ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS



ALREADY USING



EU 34

World 29

EU 19

World 16

\*This question has been asked differently in 2021.

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

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

Basis: companies with passenger cars

# 100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY\*

In %

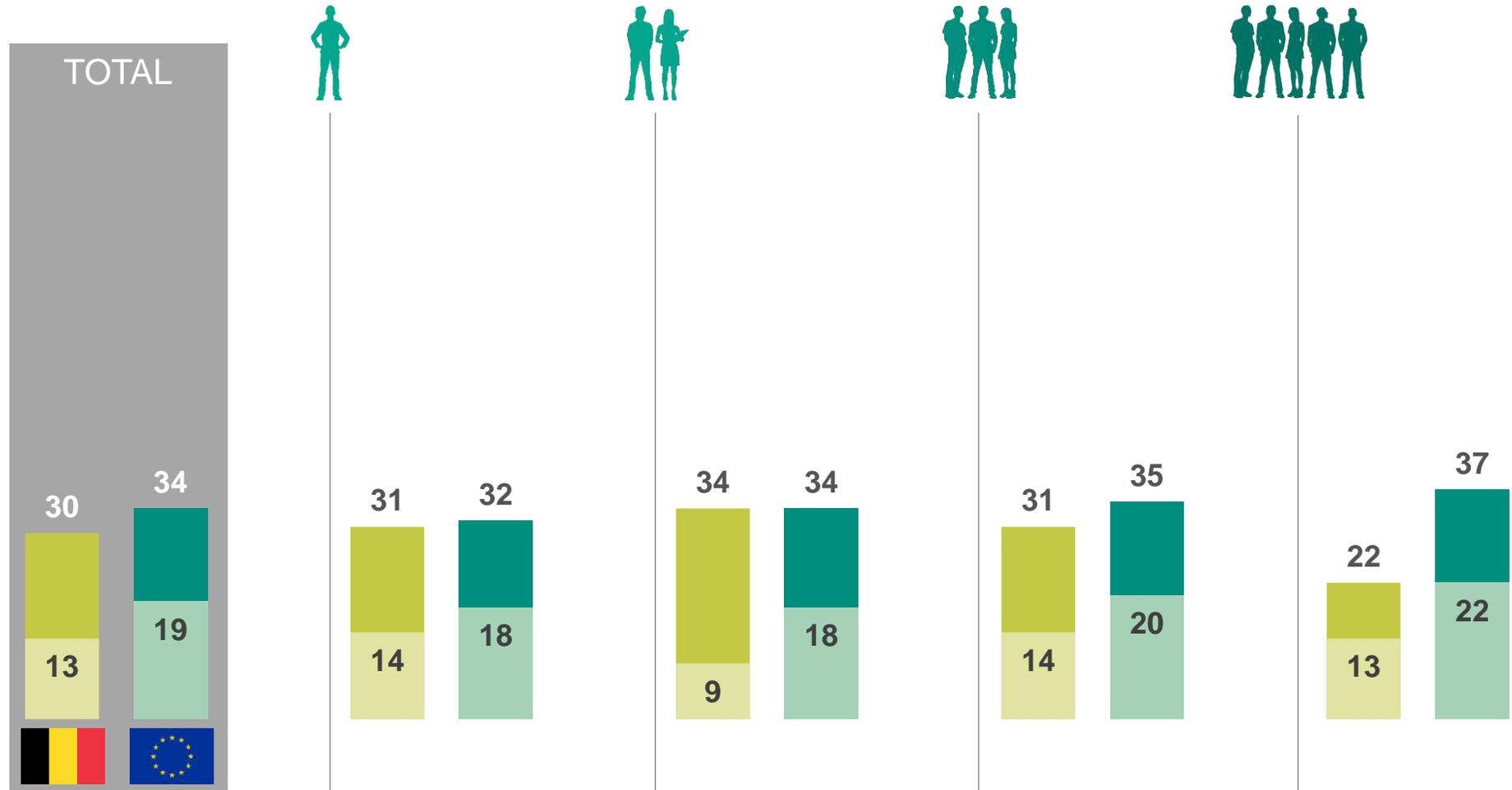
Passenger cars



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING



\*This question has been asked differently in 2021.  
 Amongst the following alternative fuel technologies, which ones do you currently use...?  
 Amongst the following alternative fuel technologies, which ones are you considering using...?  
 Basis: companies with passenger cars

# 100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY\*

In %



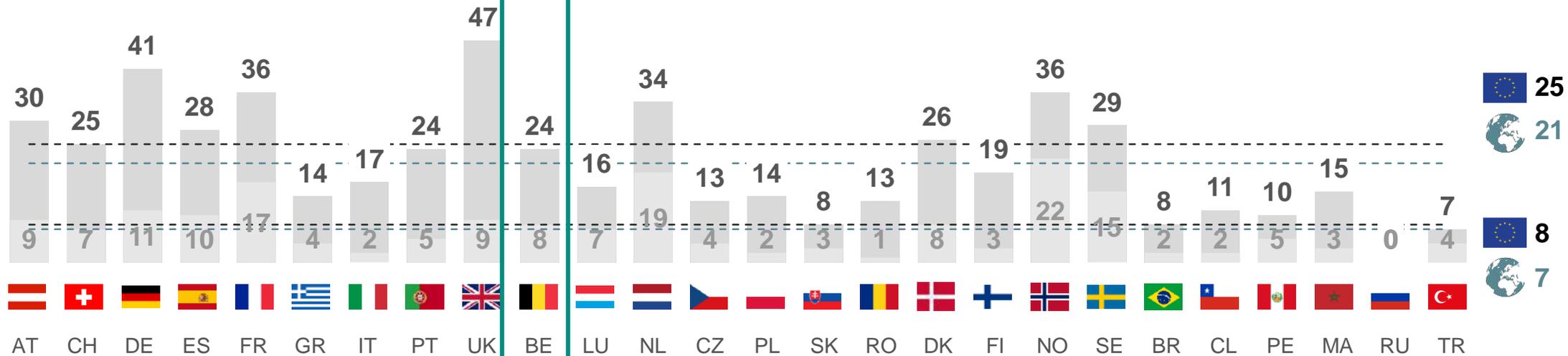
LCVs



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING



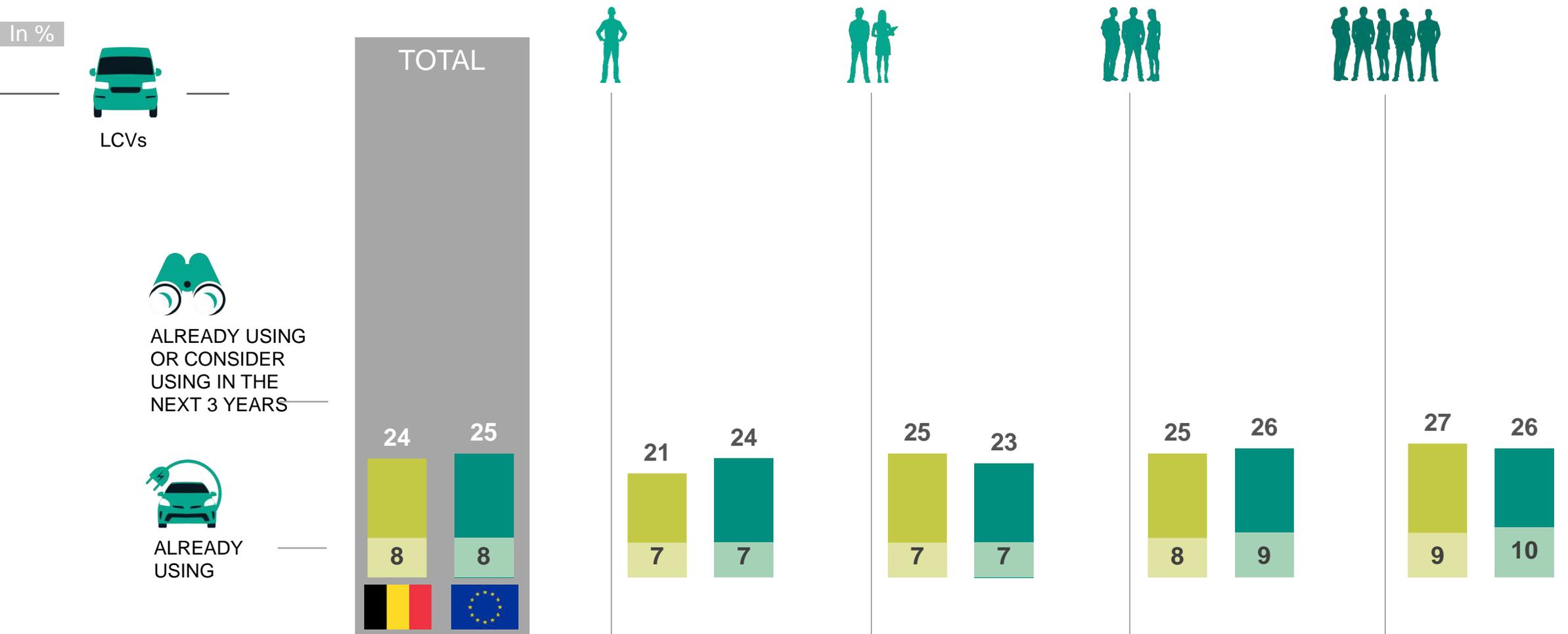
\*This question has been asked differently in 2021.

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

# 100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY\*



\*This question has been asked differently in 2021.  
 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 100% BATTERY ELECTRIC VEHICLE USAGE

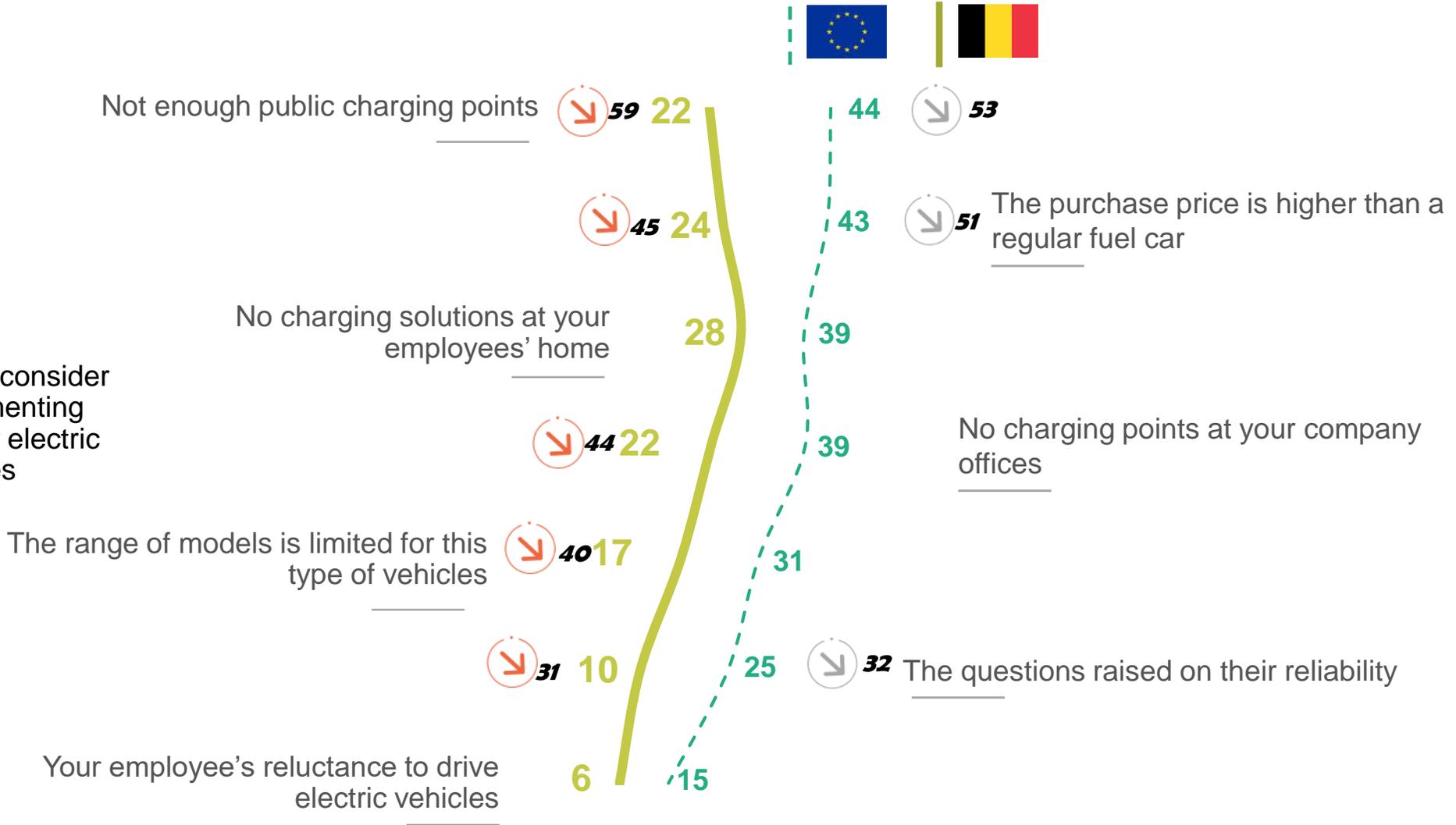
In %



Passenger cars + LCVs

do not consider implementing battery electric vehicles

59



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

# ACCESS TO CHARGING POINTS

In %



Passenger cars + LCVs

Currently no charging points installed at the company premises

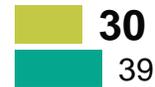
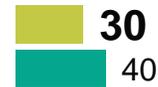
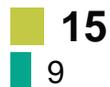
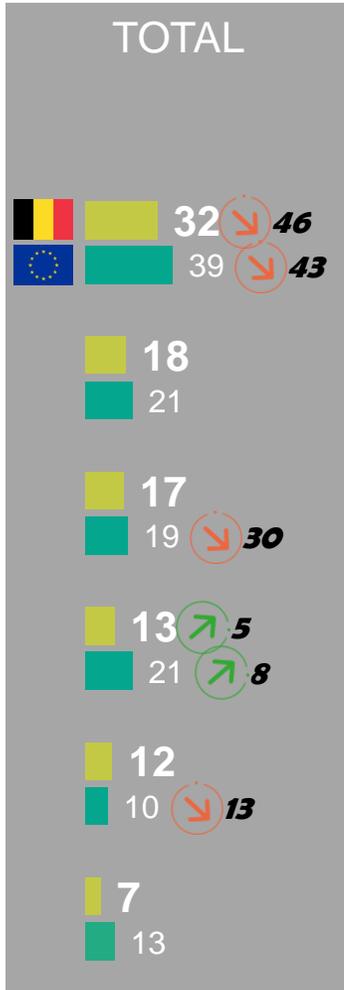
Charging points are planned to be installed at the company premises in the next 12 months

Charging points installed at the company premises and free charging for drivers

Drivers have to pay for home installation of charging points

Charging points installed at the company premises and drivers charged for charging

Company subsidises cost of home installations of charging points for drivers



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 Plug-in hybrid and 100% electric vehicles

# COMPANY'S STRATEGY TOWARDS PROVIDING CHARGING POINTS

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

In %



Passenger cars + LCVs

Consider to set up charging points in your company

68

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

38 ↘ 51

TOTAL



64

35



70

39



72

45 ↘ 69



68

28 ↘ 56

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

6

# WHAT ARE THE PERSPECTIVES IN TERMS OF ALTERNATIVE MOBILITY SOLUTIONS?



# MOBILITY ALTERNATIVES LIST AND DEFINITIONS



## **CORPORATE CAR SHARING:**

where an employee can make a vehicle reservation via an external solution



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



**RIDE SHARING:** where several employees travel in the same car to the same destination (Bolt, Faxe)



**AN APP TO BOOK MOBILITY SOLUTIONS PROVIDED BY THE COMPANY**



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



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



**PUBLIC TRANSPORT**



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

# ALTERNATIVE MOBILITY SOLUTIONS IMPLEMENTATION

At least one already implemented

- List of the alternative mobility solutions:
- CORPORATE CAR SHARING
  - RIDE SHARING
  - BIKE SHARING
  - PUBLIC TRANSPORT
  - MOBILITY BUDGET
  - AN APP TO BOOK MOBILITY SOLUTIONS PROVIDED BY THE COMPANY
  - PRIVATE LEASE OR SALARY SACRIFICE
  - A SHORT OR MID TERM RENTAL VEHICLE

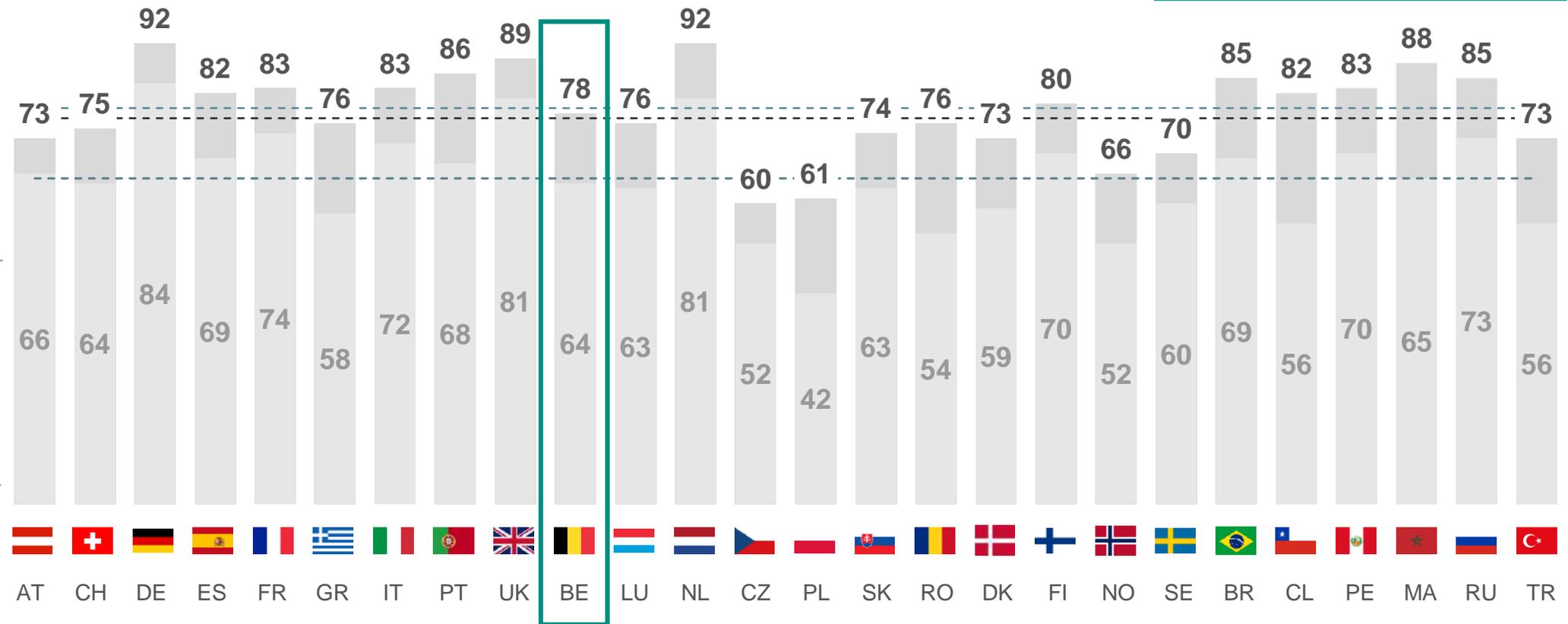
In %



ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS



ALREADY USING



EU 77  
 World 79  
 EU 65  
 World 65

Have you implemented or will you implement alternative mobility solutions in the next 3 years?  
 Response scale: Already using, considered in the next 3 years, not interested  
 Basis: companies with corporate vehicles = 100%

# ALTERNATIVE MOBILITY SOLUTIONS IMPLEMENTATION

At least one already implemented

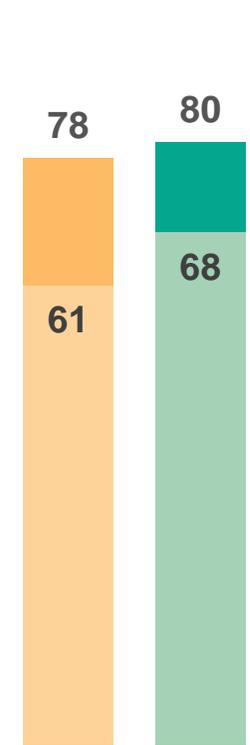
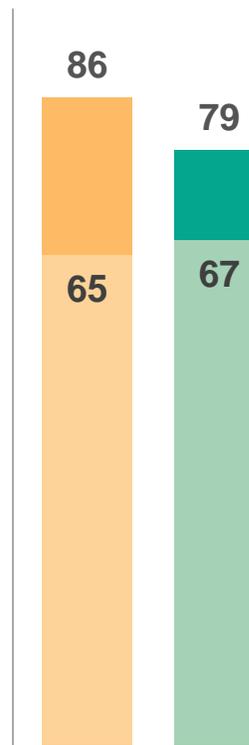
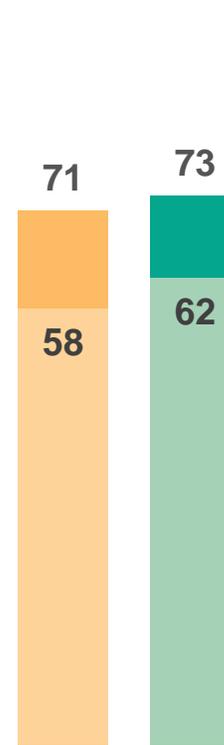
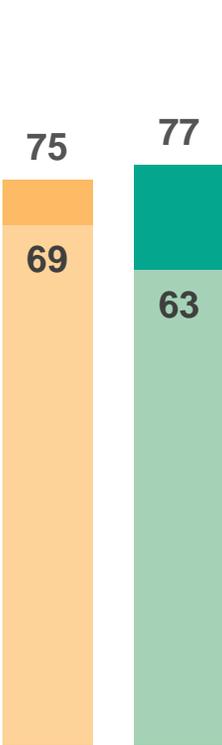
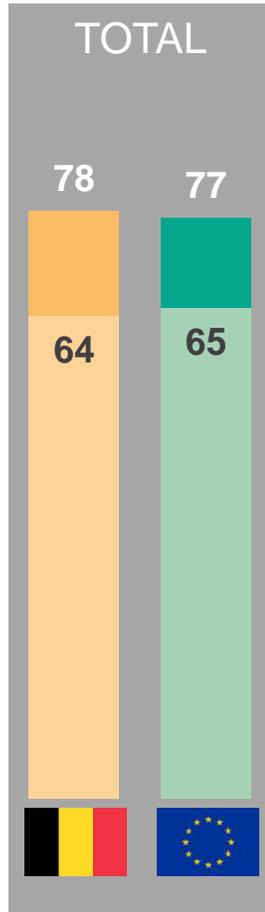
In %



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



Have you implemented or will you implement alternative mobility solutions in the next 3 years?  
Response scale: Already using, considered in the next 3 years, not interested  
Basis: companies with corporate vehicles = 100%

# PROVIDING FULL DISCLOSURE OF THE MOBILITY BUDGET

In %



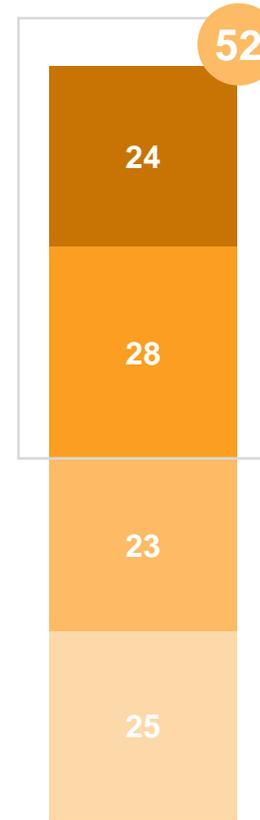
Passenger cars + LCVs

COMPANIES  
OFFERING OR  
CONSIDERING TO  
OFFER A MOBILITY  
PLAN TO EMPLOYEES



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

- Yes, certainly
- Yes, probably
- No, probably no
- No, certainly not

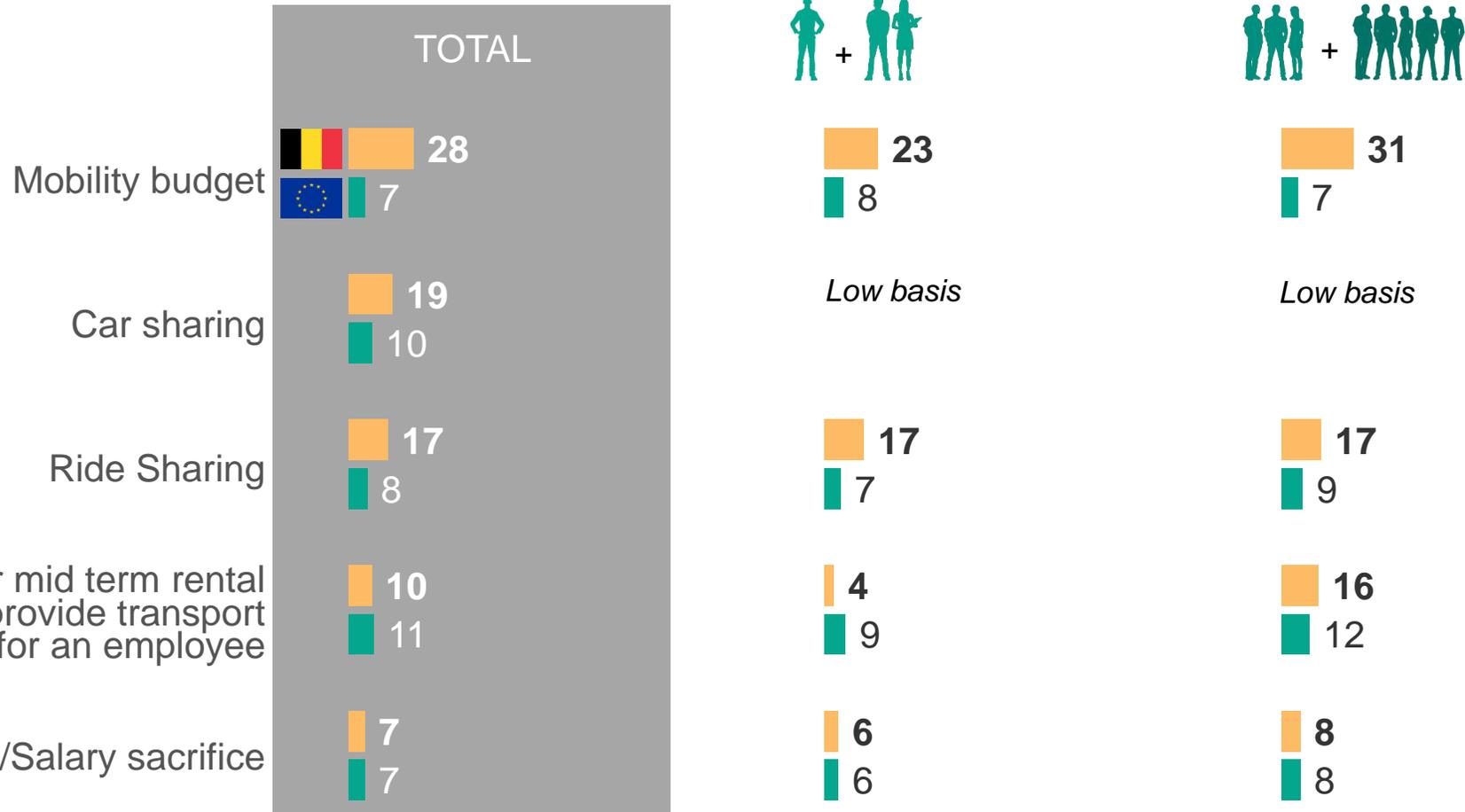


When offering such a mobility programme, would you give the employees full disclosure of their budget and the real costs?  
**Basis: companies that offer or consider offering mobility plans to the employees**

# LIKELIHOOD TO GIVE UP ALL / PART OF THE FLEET FOR ALTERNATIVE MOBILITY SOLUTIONS\*

Certainly

In %



\*This question hasn't been asked in 2021. Comparison possible vs 2020.  
 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**

# READY TO INTRODUCE OR INCREASE HOMEWORKING

In %



Passenger cars + LCVs

% YES



Average number of days per week

Expected decrease of kms for the car drivers



2.9

32%



3.0

23%



3.0

27%



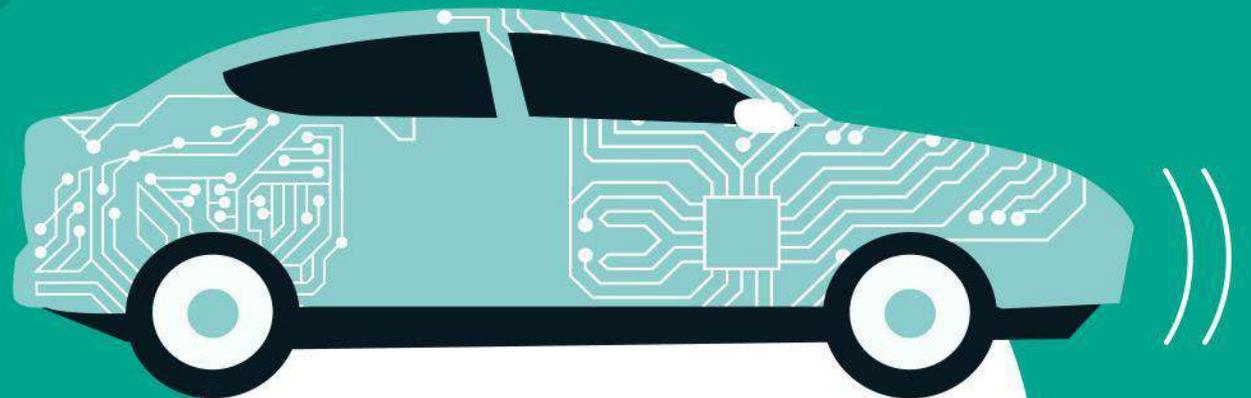
2.9

29%

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

7

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



# PROPORTION OF COMPANIES USING CONNECTED VEHICLES\*

All vehicles

In %



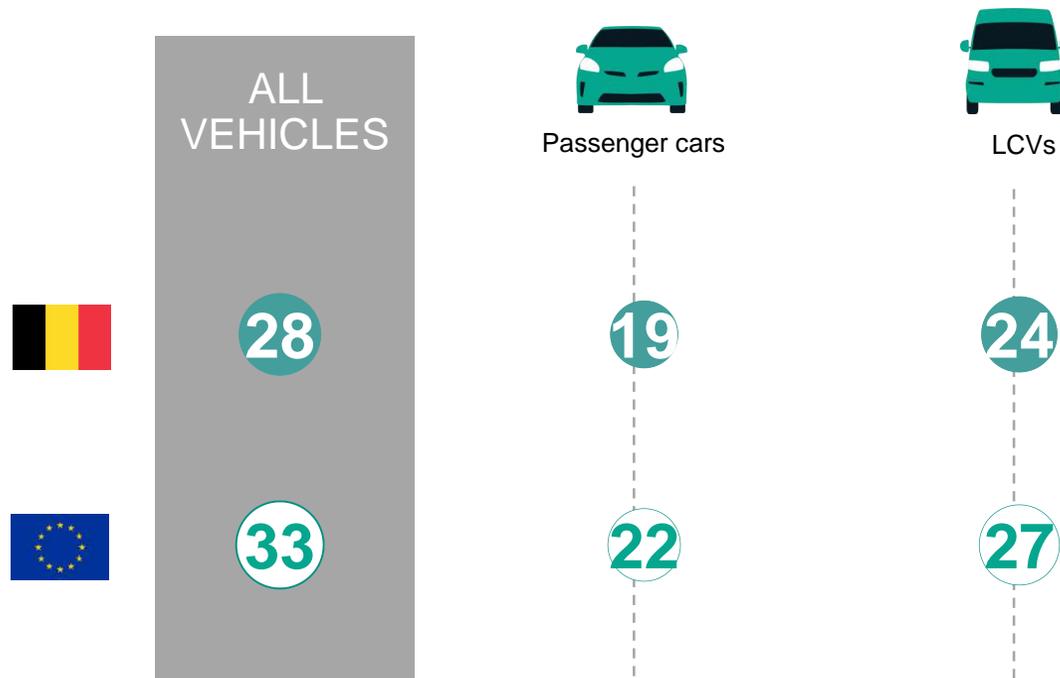
Passenger cars + LCVs

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

## HOW TO READ THE RESULTS ?

28% of companies with fleet using connected vehicles for all or part of their fleet.

19% use connected vehicles for passenger cars, while 24% use connected vehicles for LCVs.



\*This question has been asked differently in 2021, no comparison vs 2021

*Is your fleet connected thanks to a telematic tool?*

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

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

# PROPORTION OF COMPANIES USING CONNECTED VEHICLES\*

All vehicles

In %



Passenger cars + LCVs

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



\*This question has been asked differently in 2021, no comparison vs 2021

*Is your fleet connected thanks to a telematic tool?*

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

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

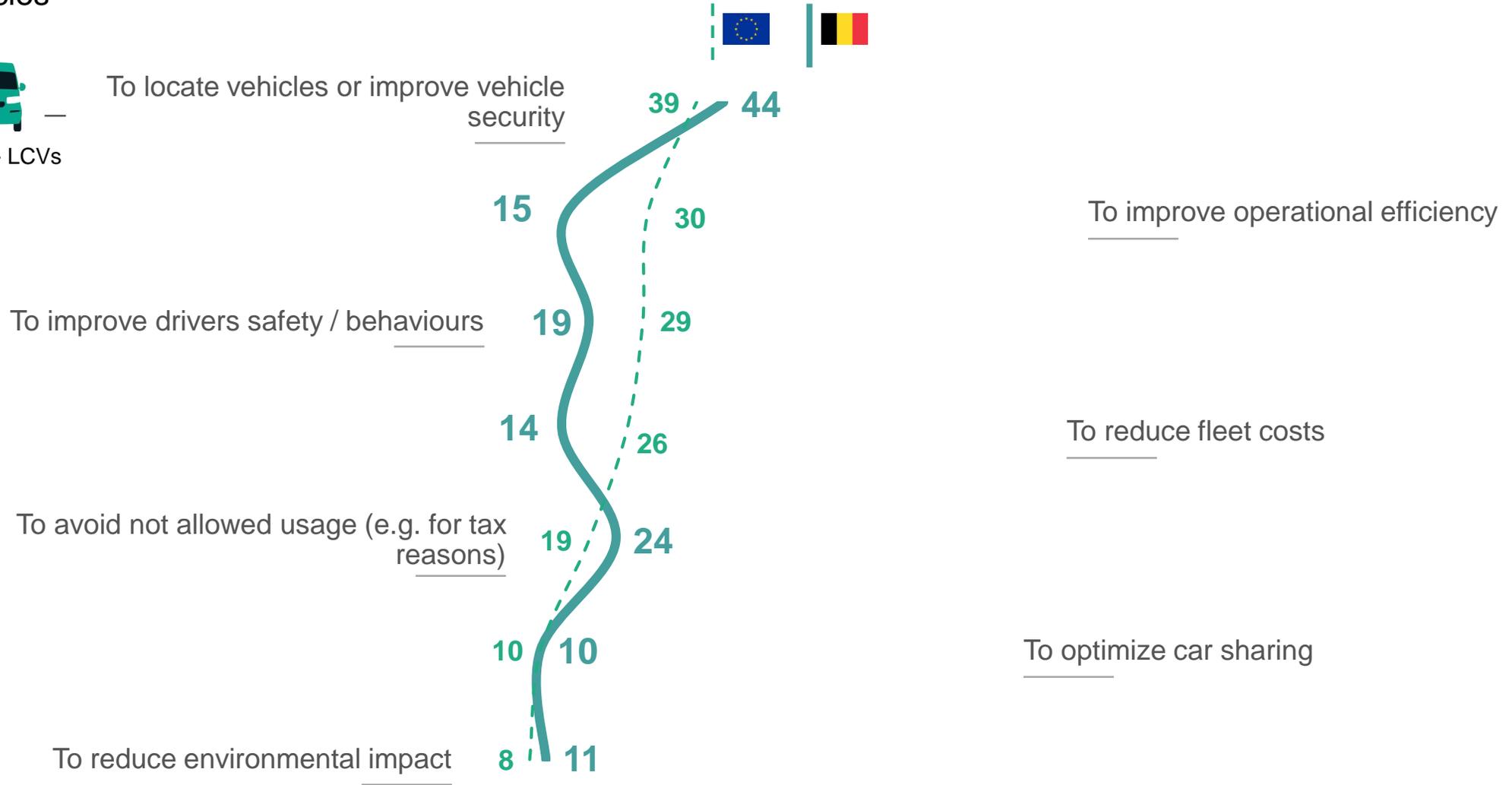
# REASONS FOR USING CONNECTED VEHICLES

All vehicles

In %



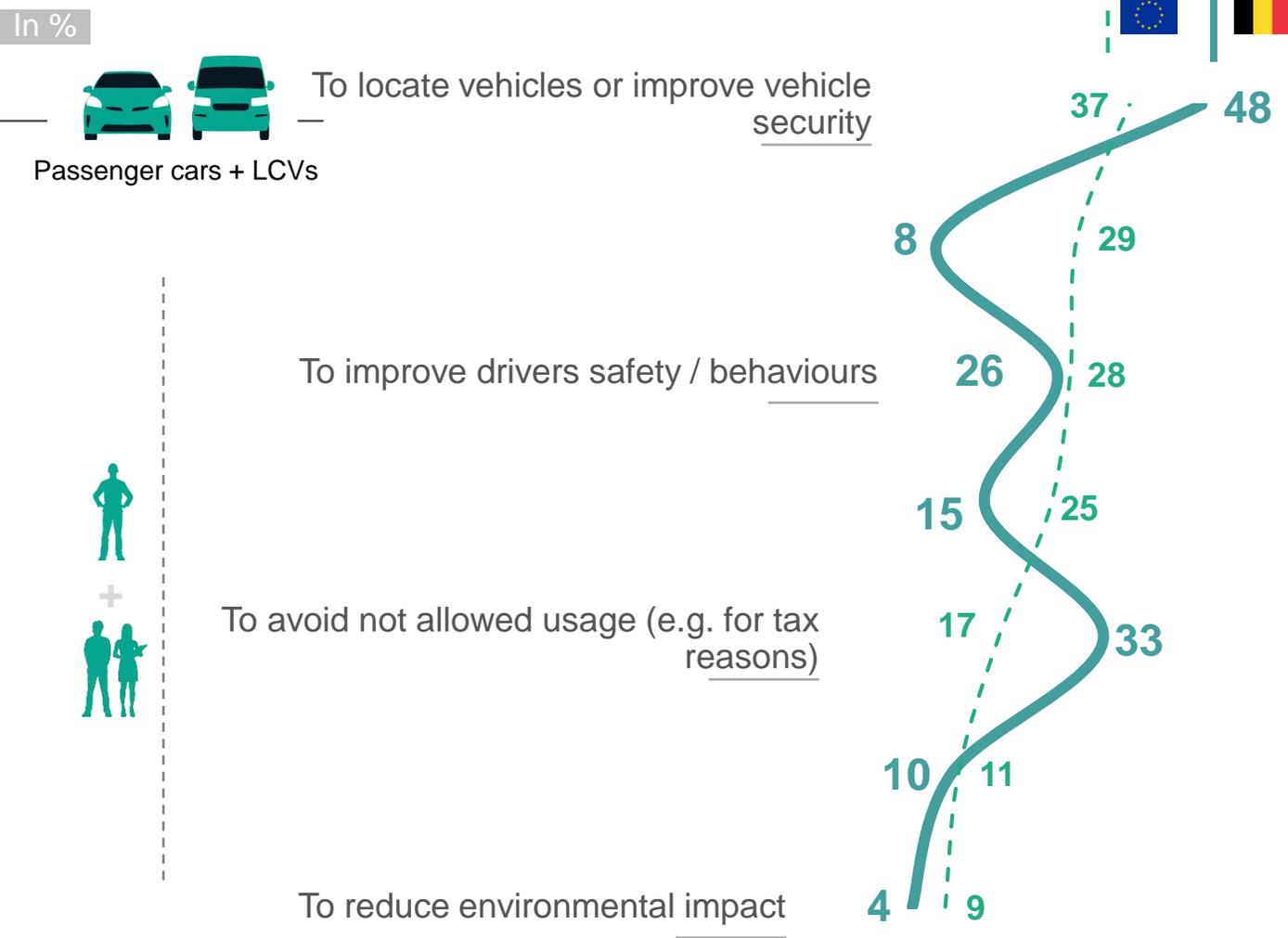
Passenger cars + LCVs



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

# REASONS FOR USING CONNECTED VEHICLES

All vehicles - Focus on 1 to 99



To improve operational efficiency

To reduce fleet costs

To optimize car sharing

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

# REASONS FOR USING CONNECTED VEHICLES

All vehicles - Focus on 100 and more

In %



Passenger cars + LCVs

To locate vehicles or improve vehicle security

To improve drivers safety / behaviours

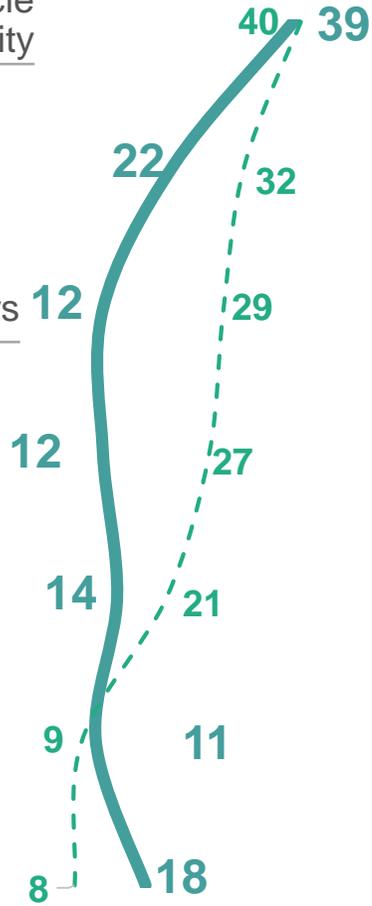
To avoid not allowed usage (e.g. for tax reasons)

To reduce environmental impact

To improve operational efficiency

To reduce fleet costs

To optimize car sharing

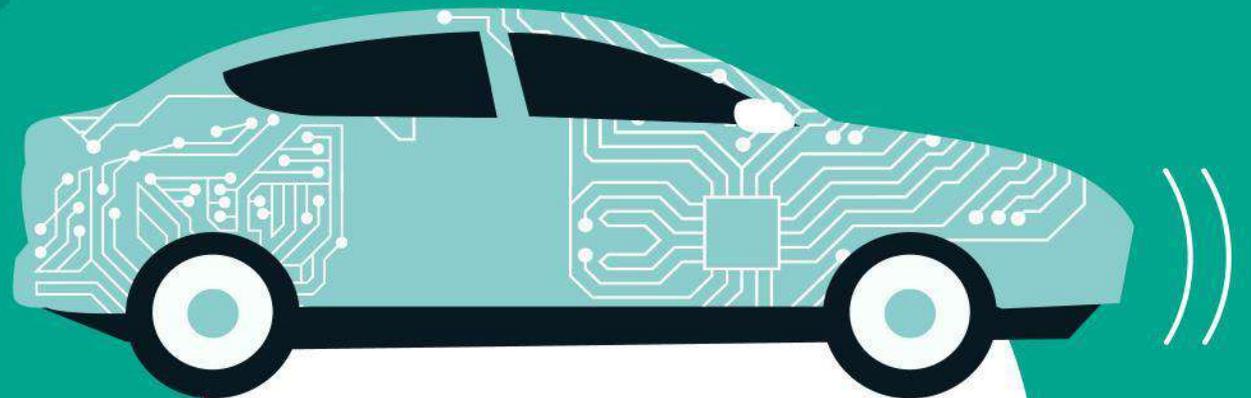


What are the two main reasons why your fleet is connected by Telematics?  
**Basis: companies with connected vehicles thanks to Telematics**

7

# CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY

## A. PASSENGER CARS



# PROPORTION OF COMPANIES USING CONNECTED VEHICLES\*

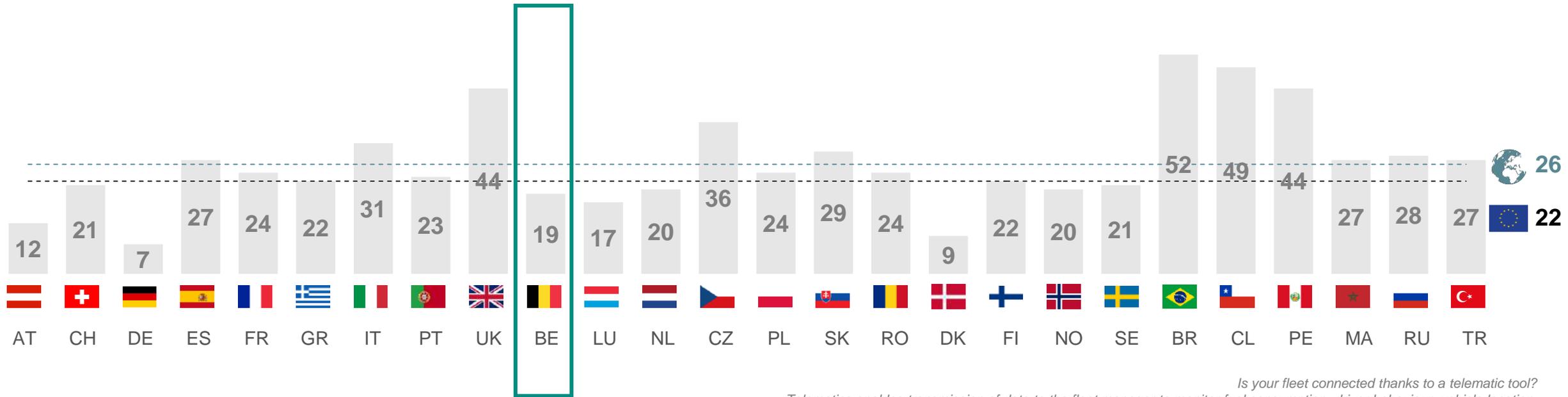
Passenger cars

In %



Passenger cars

PROPORTION OF COMPANIES USING CONNECTED VEHICLES FOR THEIR PASSENGER CARS



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

# PROPORTION OF COMPANIES USING CONNECTED VEHICLES\*

## Passenger cars

In %

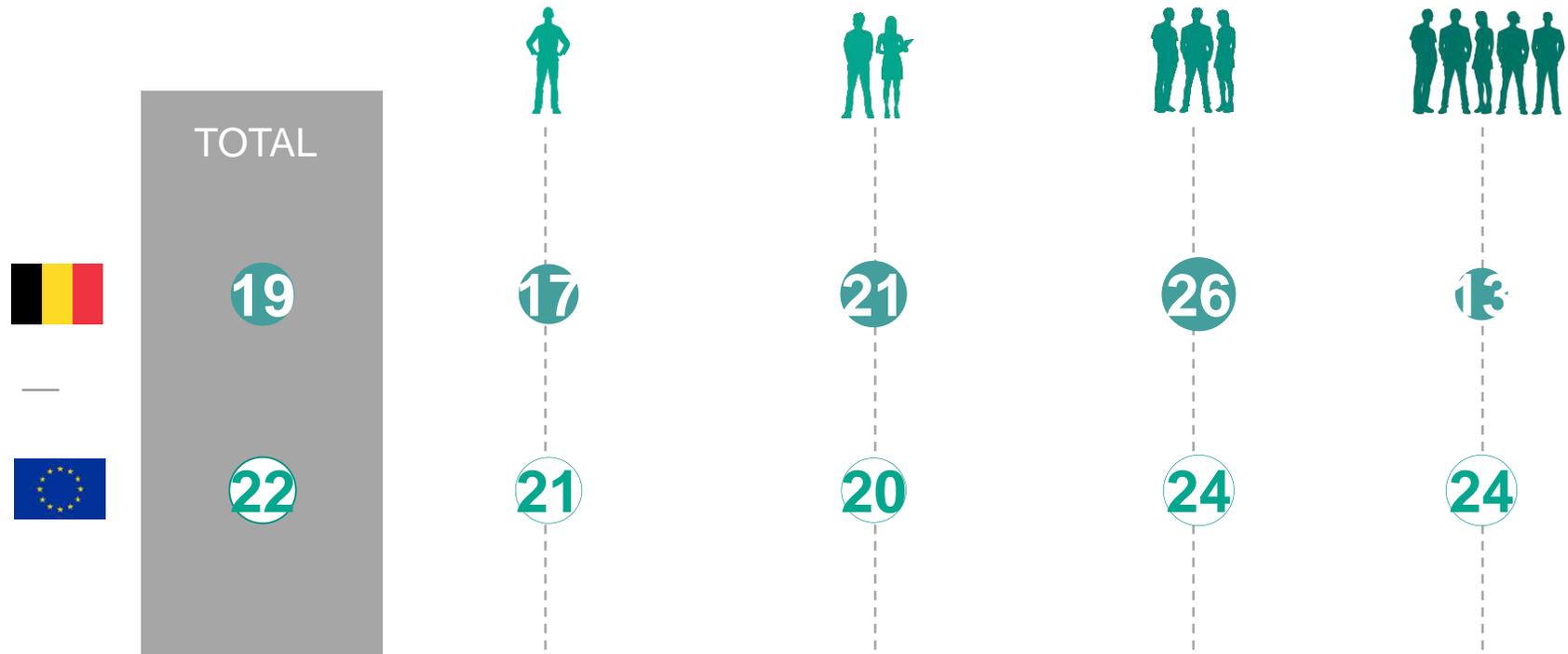


Passenger cars

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

HOW TO READ THE RESULTS ?

19% use connected vehicles for passenger cars.



\*This question has been asked differently in 2021, no comparison vs 2021.

Is your fleet connected thanks to a telematic tool?

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

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

# REASONS FOR USING CONNECTED VEHICLES

## Passenger cars

In %



Passenger cars

To locate vehicles or improve vehicle security

To improve operational efficiency

To avoid not allowed usage (e.g. for tax reasons)

To reduce environmental impact



To improve drivers safety / behaviours

To reduce fleet costs

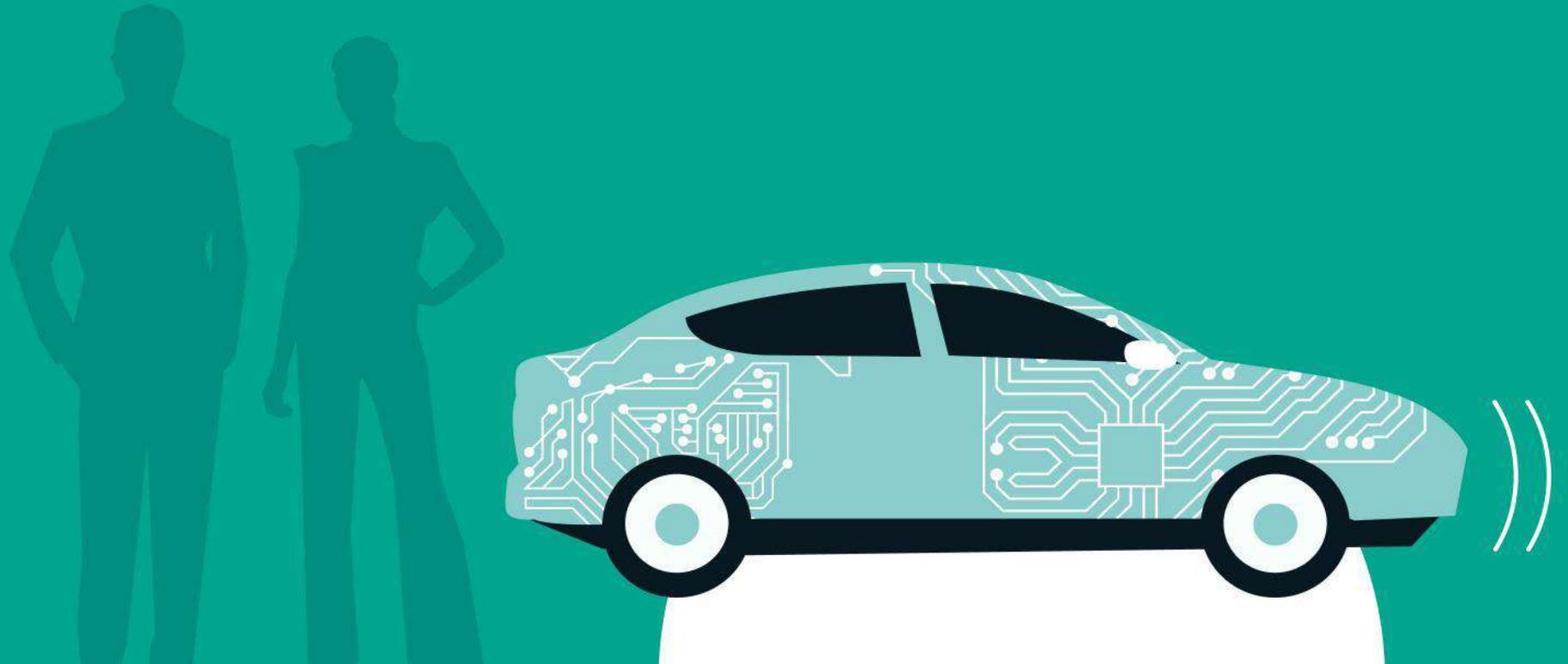
To optimize car sharing

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

7

# CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY

## B. LCVs



# PROPORTION OF COMPANIES USING CONNECTED VEHICLES

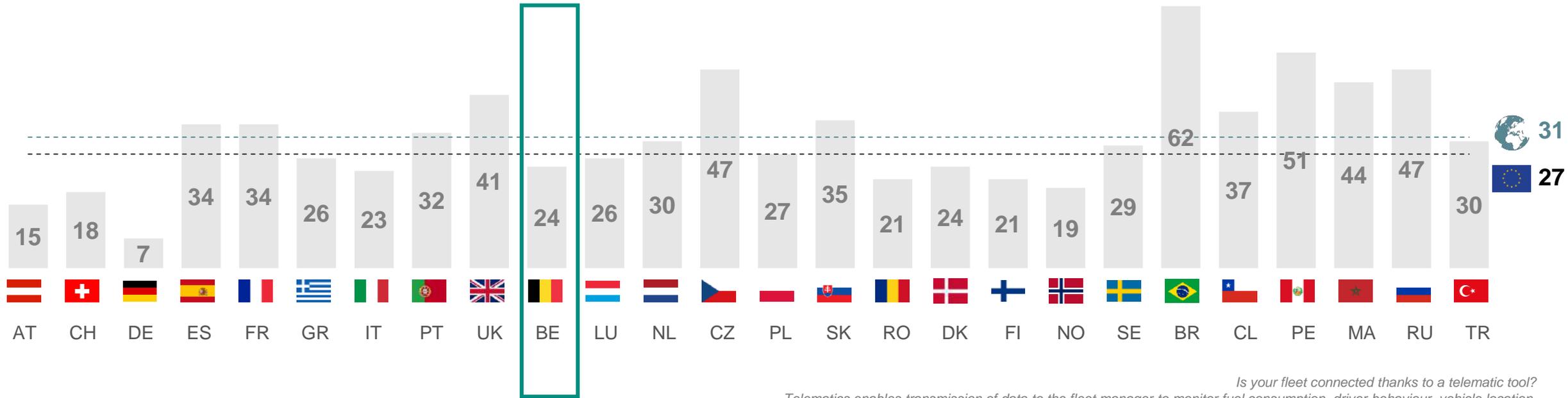
LCVs

In %



LCVs

PROPORTION OF COMPANIES USING CONNECTED VEHICLES FOR THEIR LCVs



Is your fleet connected thanks to a telematic tool?

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

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

# PROPORTION OF COMPANIES USING CONNECTED VEHICLES\*

LCVs

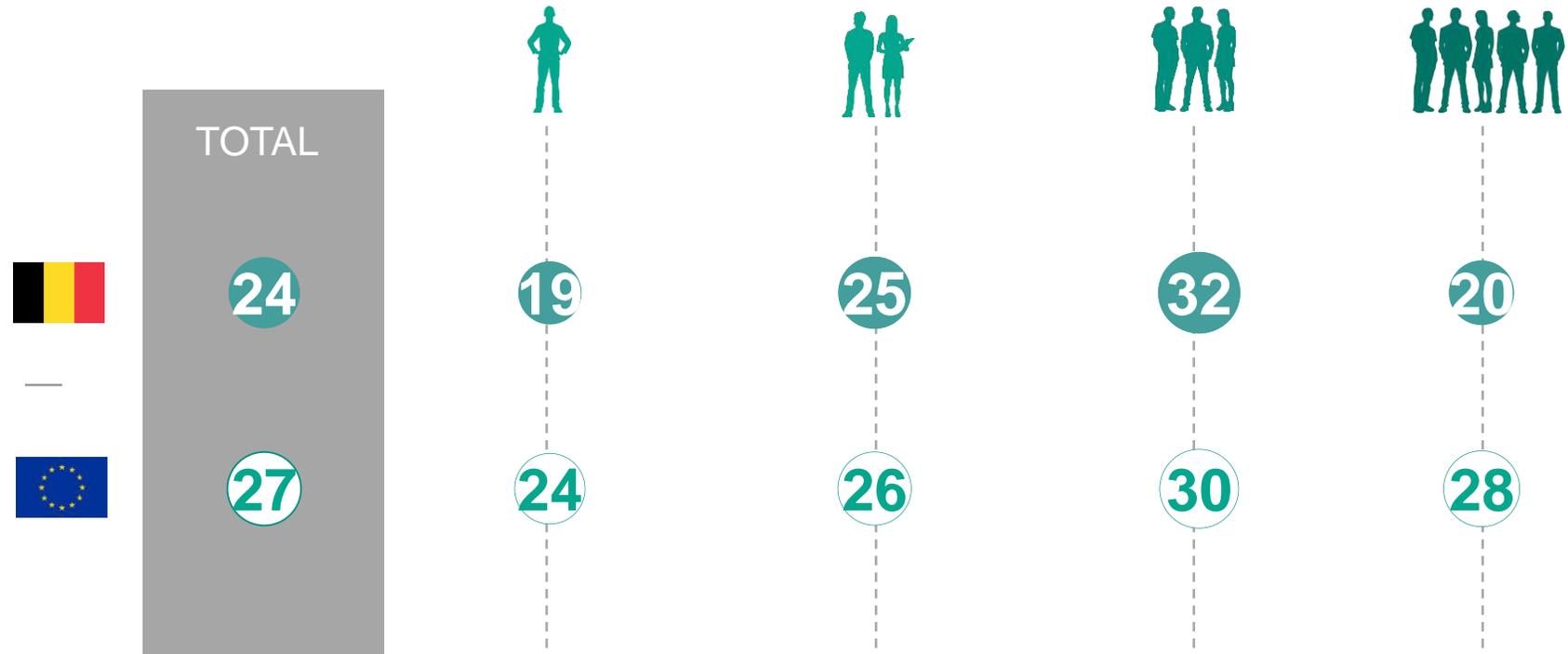
In %



LCVs

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

HOW TO READ THE RESULTS ?  
24% use connected vehicles for LCVs.



\*This question has been asked differently in 2021, no comparison vs 2021.

Is your fleet connected thanks to a telematic tool?

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

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

# REASONS FOR USING CONNECTED VEHICLES

LCVs

In %



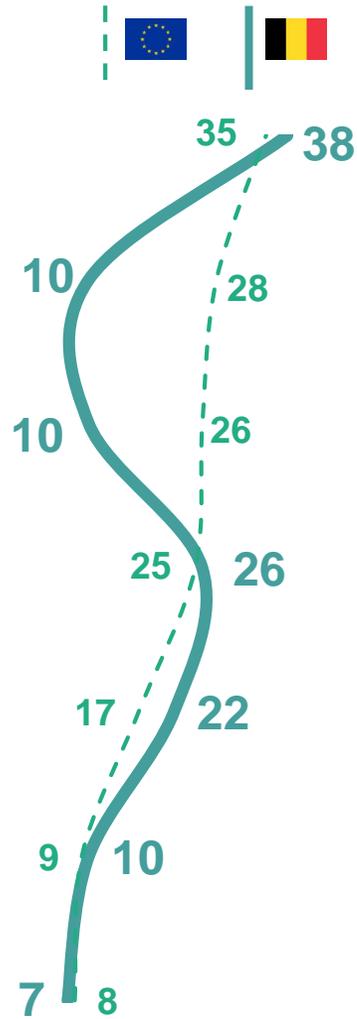
LCVs

To locate vehicles or improve vehicle security

To reduce fleet costs

To avoid not allowed usage (e.g. for tax reasons)

To reduce environmental impact



To improve operational efficiency

To improve drivers safety / behaviours

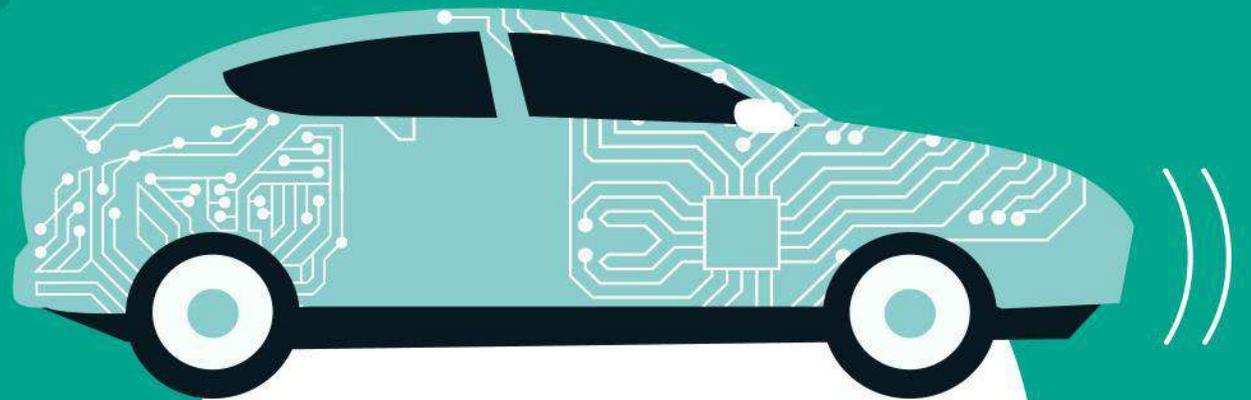
To optimize car sharing

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

7

# CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY

## C. ROAD SAFETY



# ACTIONS SET UP TO INCREASE ROAD SAFETY

In %



Passenger cars + LCVs

Yes, already implemented

**NET** Already implemented  
or consider

Adding an additional equipment  
(aftermarket / retrofit) in order to  
alert the driver

Smartphone blocking

Real world driving style analysis

E-learning

TOTAL

15 25

12 20

9 19

8 18



10 21

13 19

4 9

8 17



21 34

7 16

15 24

2 9



20 28

11 20

13 23

8 19



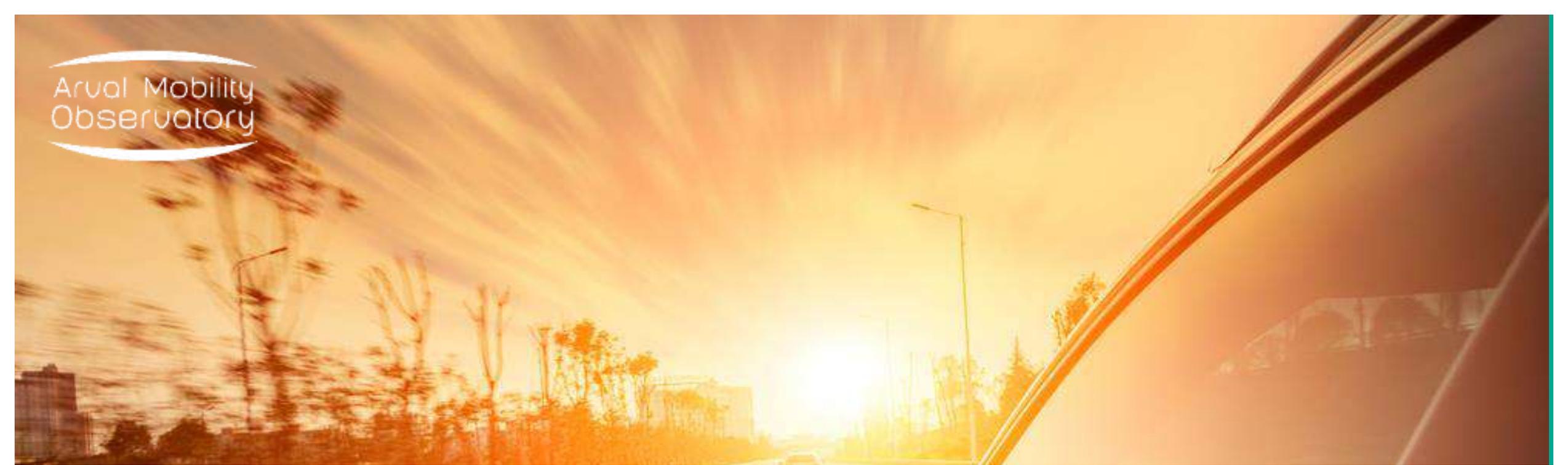
9 20

15 25

8 23

11 25

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



**Thank you**



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