



MOBILITY AND FLEET BAROMETER 2021

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What are the main characteristics of the fleets?

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1

CONTEXT AND METHODOLOGY



KEY THEMES FOR ARVAL MOBILITY OBSERVATORY



1

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



2

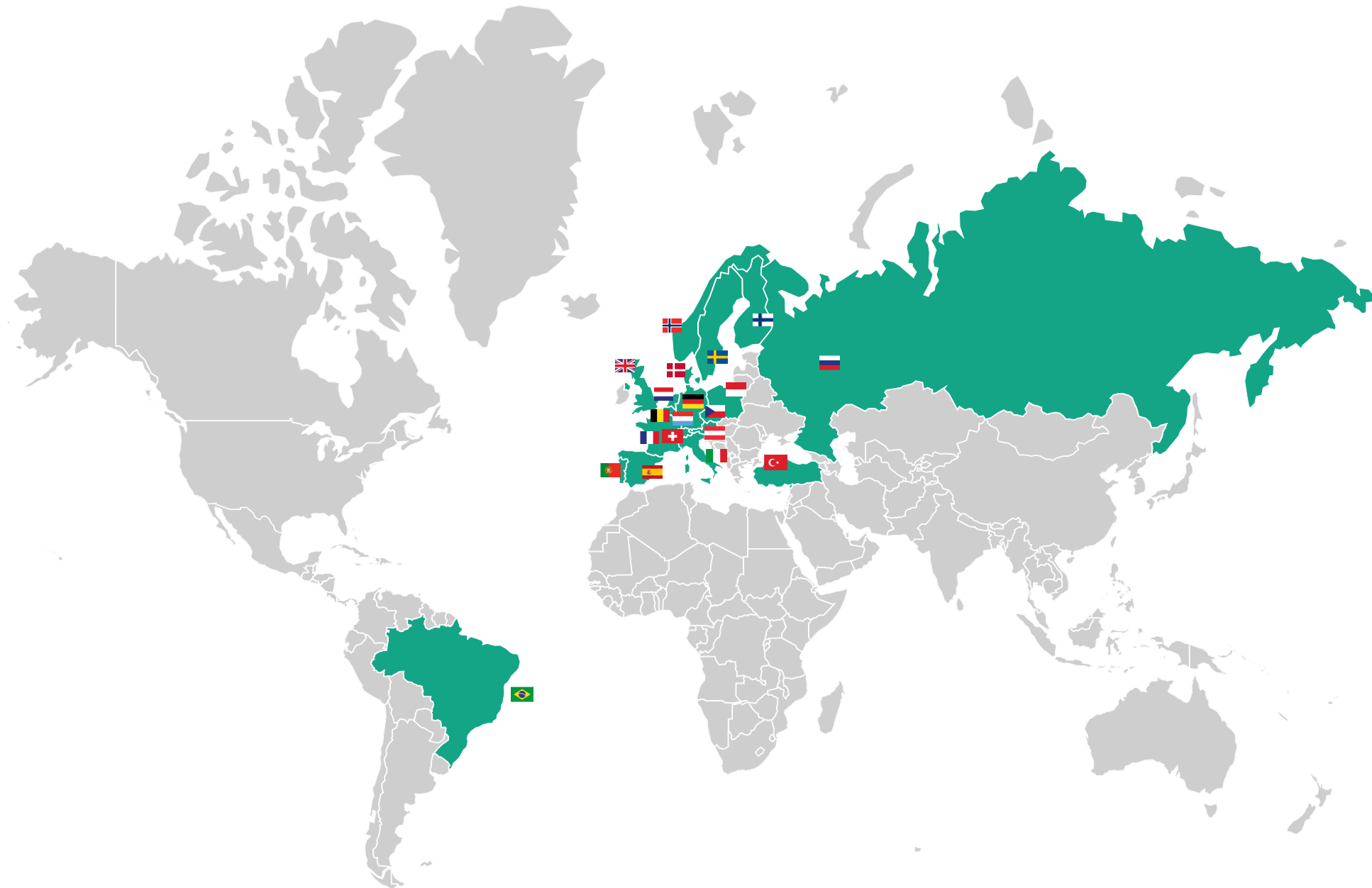
**WHAT KIND OF VEHICLES
WILL THE MARKET EXPECT
IN 3 YEARS?**



3

**HOW WILL NEW MOBILITY
SOLUTIONS AFFECT
BUSINESS MODELS?**

PERIMETER OF THE SURVEY



METHODOLOGY

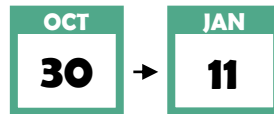


DATA COLLECTION METHOD

CATI CAWI SYSTEM
Recruitment by telephone and a link is sent to complete the survey online



FIELDWORK PERIOD



TARGET

FLEET MANAGERS
in companies of all industries using at least **1 CORPORATE VEHICLE**



QUOTAS

COMPANY SIZE & SECTOR



SAMPLE

4 443 through Europe
754 out of Europe

5 197 Interviews in total



DURATION OF INTERVIEW

10 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:



X
X

Significantly higher than previous year

XX = score 2020



X
X

Significantly lower than previous year

XX = score 2020

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

NUMBER OF INTERVIEWS CONDUCTED IN THE NETHERLANDS

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



Companies with less than 10 employees
73 INTERVIEWS



Companies with 10 to 99 employees
52 INTERVIEWS



Companies with 100 to 499 employees
71 INTERVIEWS

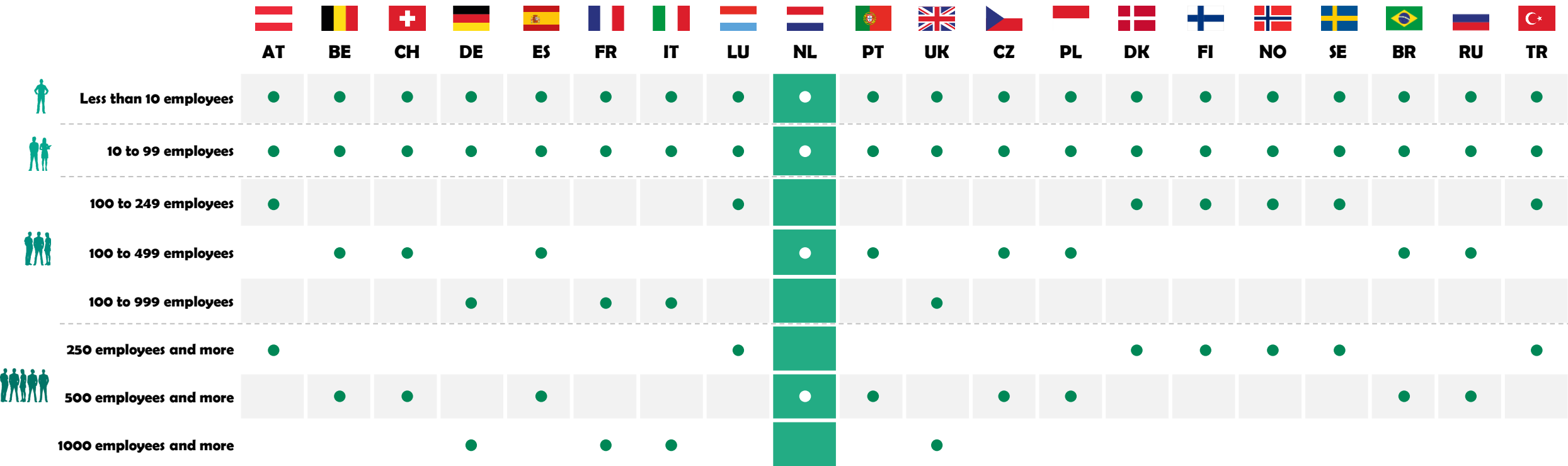


Companies with 500 employees and more
54 INTERVIEWS

**1 to 99
employees**
125 INTERVIEWS

**100 employees
and more**
125 INTERVIEWS

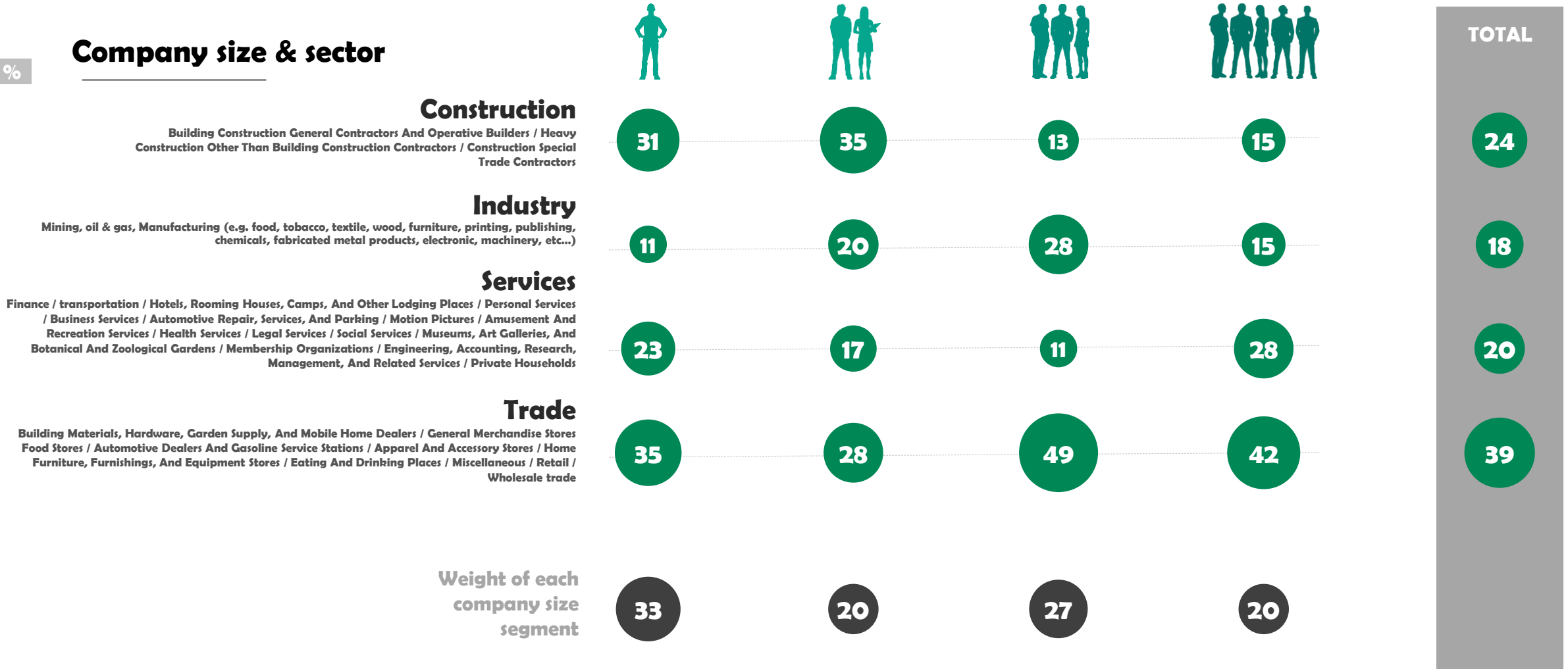
COMPANY SIZE SEGMENT DEFINITION



SAMPLE STRUCTURE IN THE NETHERLANDS

In %

Company size & sector



This sample structure was set up in order to be roughly representative of the number of vehicles registered by companies for each company size segment and activity sector as well as to allow comparisons between countries on a similar 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 (Blablacar, Togethr)



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



GLOBAL COUNTRY INSIGHT: DUTCH COMPANIES ARE ACCELERATING THEIR TRANSFORMATION REGARDING MOBILITY AND KEEP LEADING THE WAY IN ALTERNATIVE FUEL TECHNOLOGIES TRANSITION.

#1

**THE COVID-19
CRISIS HAS
ACCELERATED
THE
DEVELOPMENT
OF COMPANIES'
MOBILITY OFFER.**

#2

**ALTERNATIVE
TECHNOLOGIES
ADOPTION IS ALSO
ACCELERATING.**

#3

**STRONG GROWTH
PERSPECTIVES FOR
OPERATING
LEASING IN THE
COMING YEARS.**

INSIGHT 1: THE COVID-19 CRISIS HAS ACCELERATED THE DEVELOPMENT OF COMPANIES' MOBILITY OFFER.

#1

LIKE IN THE REST OF EUROPE, THE COVID-19 CRISIS HAS RESHAPED THE COMPANIES' MOBILITY OFFER

- **Despite the health context, the corporate fleet size in the Netherlands tends to increase this year, with 113 company cars on average (vs 91 last year) and fleet managers are optimistic, as more than half expect to increase their fleet size within the next 3 years, whereas only 9% plan to reduce it.**
- **Although the COVID-19 crisis seems to have a lower direct impact in the Netherlands than in the rest of Europe in terms of fleet size, it has urged fleet managers to rethink (certainly faster than expected) their mobility offer with alternative solutions that guarantee safer transport conditions to employees.**
- **Indeed, further to the end of the lockdown, the topic was no longer about providing corporate cars to some employees, but about offering mobility solutions to ALL employees.**
- **Hence, the use of private lease/salary sacrifice (40%, +21pts) and mobility budget (39%, +24pts) has significantly increased this year.**
- **But beyond the specific health context, it is all the mobility offer that is currently questioned, as:**
 - **We also observe a growing interest for shared mobility solutions, such as public transport (68% ; + 24 pts), ride sharing (67% ; + 21 pts) and corporate car sharing (67% ; +29 pts).**
 - **On average, 6 fleet managers out of 10 expect that their company car drivers would exchange all or part of their company car benefit for such alternatives in the future!**

#2

THE NETHERLANDS STRENGTHENS ITS LEADERSHIP REGARDING ALTERNATIVE TECHNOLOGIES.

- **Nowadays, fleet managers have to deal with 2 concerns: how to reach the budget balance while, at the same time, meeting their company's CSR commitments?**
- **Dutch companies have clearly understood how much the use of alternative technologies (such as HEV, PHEV and BEV) can be an answer both to the budget balance and the CSR objectives:**
 - **Regarding the budget balance:**
 - **It helps reducing fuel expenses**
 - **It is more and more accessible in terms of charging points, price (BEV are still attractive despite lower tax incentives) and models.**
 - **Regarding the CSR: it is highly expected that companies reduce their carbon footprint as more and more people now aim at supporting socially responsible & environmental-friendly brands (a trend that is reinforced with the COVID-19 crisis). In this context, zero emission cars are key to contribute to the corporate image and meet legal requirements.**
 - **Therefore, 8 companies out of 10 already use electric technologies or intend to do in the future. And overall, fleet managers even expect that 4 to 5 vehicles out of 10 to be a BEV one in the next years.**
 - **Connected vehicles could also help reaching both objectives, as it contributes to reduce the fleet costs and environmental impact, according to 3 to 4 fleet managers out of 10 (although, connected vehicles first key levers of adoption remain control and safety).**

INSIGHT 3: STRONG GROWTH PERSPECTIVES FOR OPERATING LEASING IN THE COMING YEARS.

#3

HOW TO FINANCE THESE GREENER FLEETS?

- **An increasing interest for operating leasing is expected in the coming years, regardless the company size.**
- **Overall, 7 companies out of 10 expect to introduce or develop the use of operating leasing to finance their corporate fleet in the future:**
 - **Among companies from 500 employees and more, 8 out of 10 have the intention to introduce or develop it in the future.**
 - **Among companies from 10 to 499 employees, they are 70% on average.**
 - **Among very small companies (less than 10 employees), they are 6 out of 10.**

3

WHAT ARE THE MAIN CHARACTERISTICS OF THE FLEETS?



INSIGHT 1: GROWTH PERSPECTIVES ARE STILL EXPECTED, IN RESPONSE TO THE NEED TO PROPOSE SAFE INDIVIDUAL MEANS OF TRANSPORTATION.

1

- **Despite the health context and contrary to the rest of Europe, the corporate fleet size in the Netherlands tends to increase this year, with 113 company cars on average (vs 91 last year).**

This increase is mainly driven by the increase of the fleet size among very small companies (less than 10 employees) and especially on the passenger segment. Meantime, we also observe:

- **A growing number of very small companies (less than 10 employees) with passenger cars.**
- **A growing number of medium and large companies (more than 100 employees) with LCVs (light commercial vehicles).**

2

Besides, fleet managers are optimistic as more than half expects to increase their fleet size within the next 3 years, which is even higher than before the crisis (only 9% of them plan to reduce it). This optimism is shared regardless the company size, even though it is stronger within large companies (that are less vulnerable to the economic impact of the crisis and more confident to the future than smaller ones?).

3

However, although the COVID-19 crisis seemed to have a lower direct impact in the Netherlands than in the rest of Europe, it has clearly contributed to reshape the fleet landscape, as even among those who plan to increase their fleet by 2023, 1 out of 4 explain that they want to guarantee safe daily commuting to their employees.

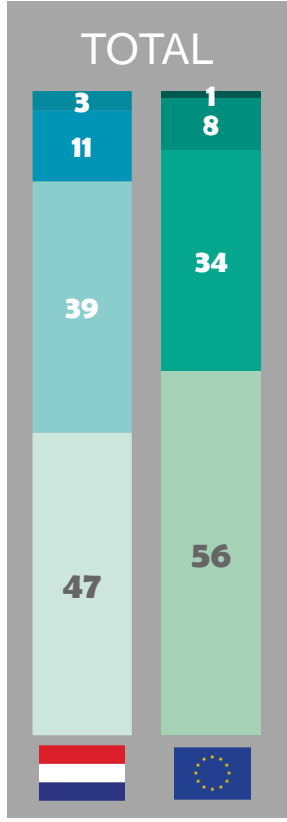
NUMBER OF VEHICLES IN FLEET

In %



Passenger cars + LCVs

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



Average number of vehicles

113 vehicles (Netherlands)
85 vehicles (EU Average)



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

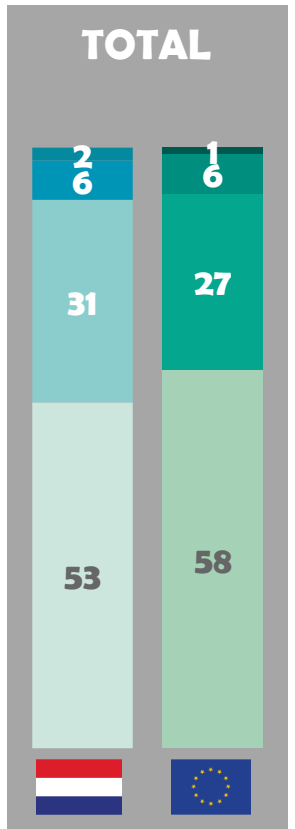


In %

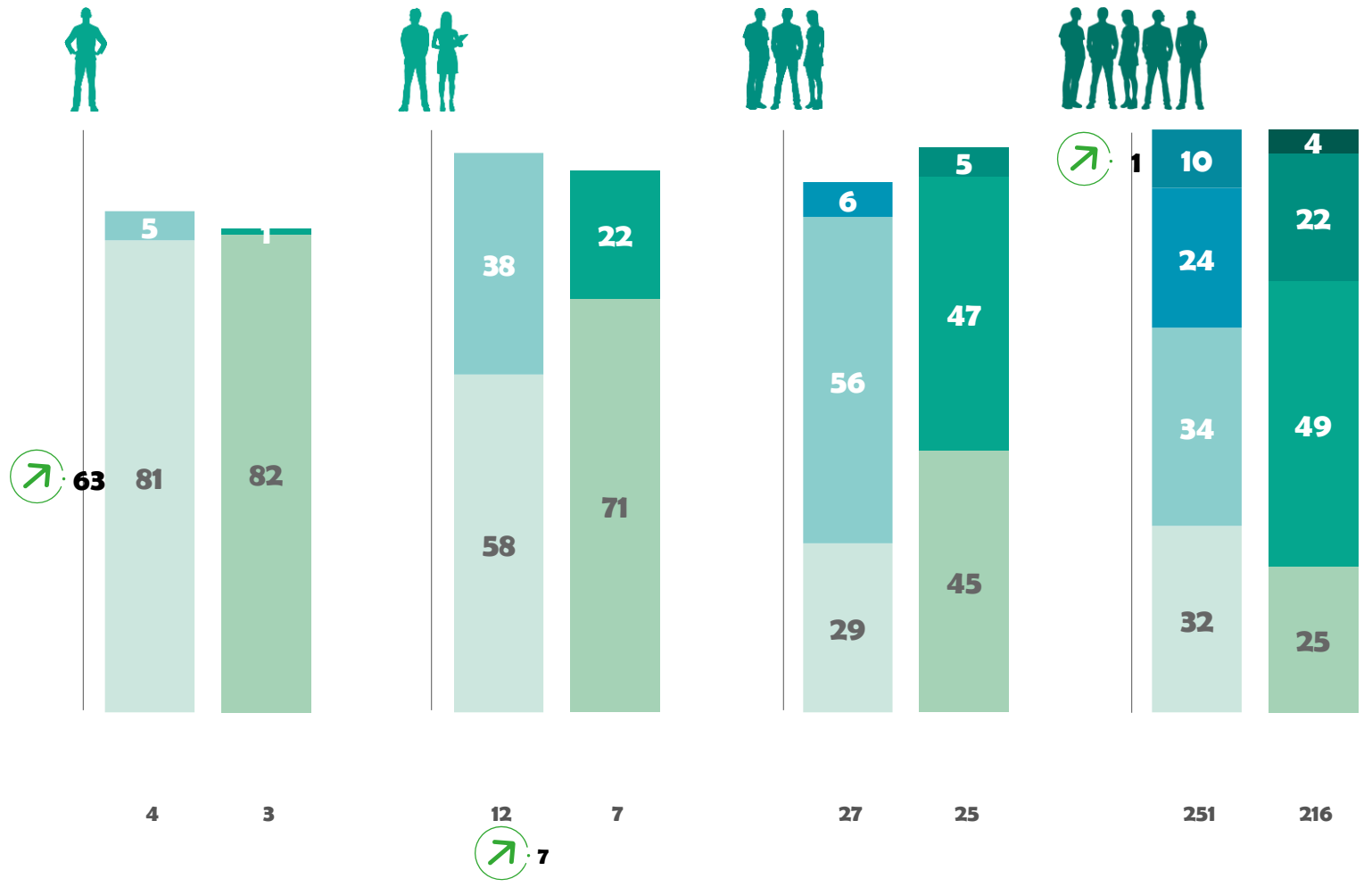
Passenger cars

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

Average number of passenger cars

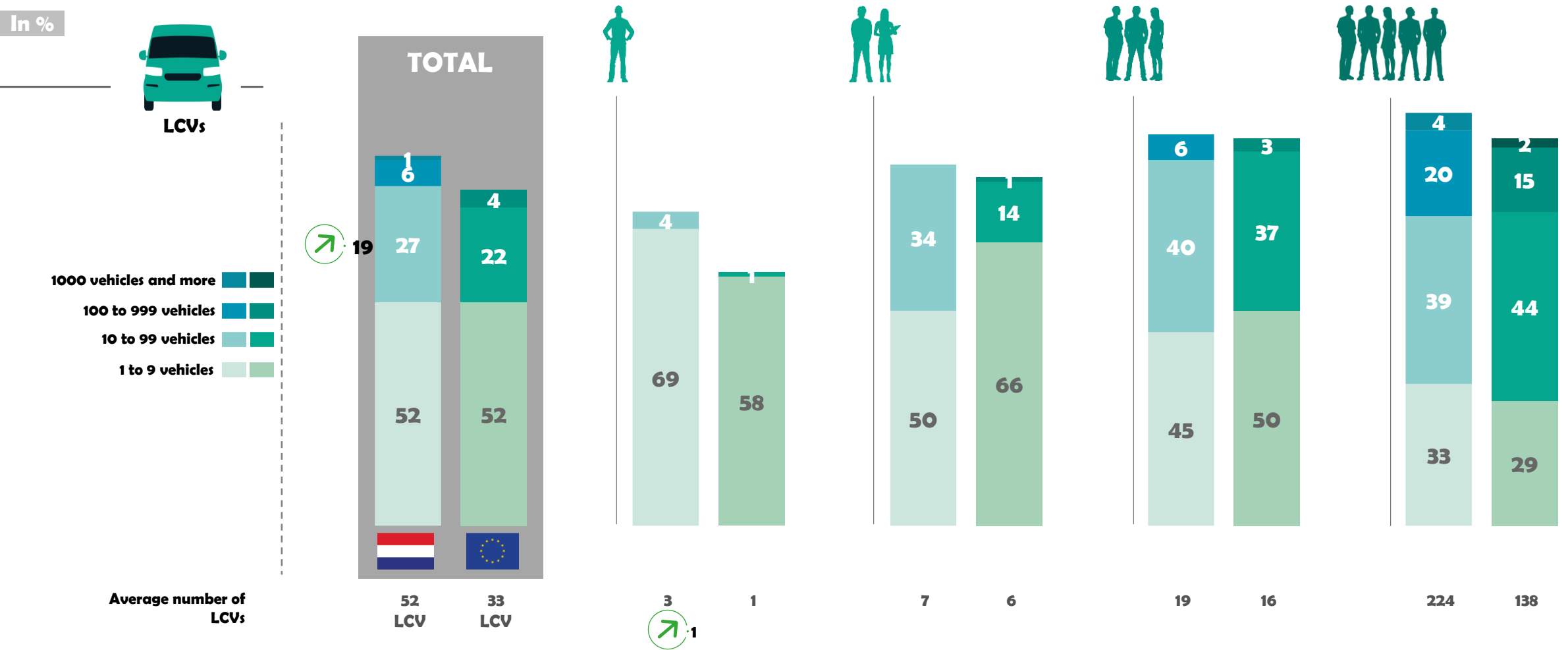


61 Passenger cars (Netherlands)
52 Passenger cars (EU)



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

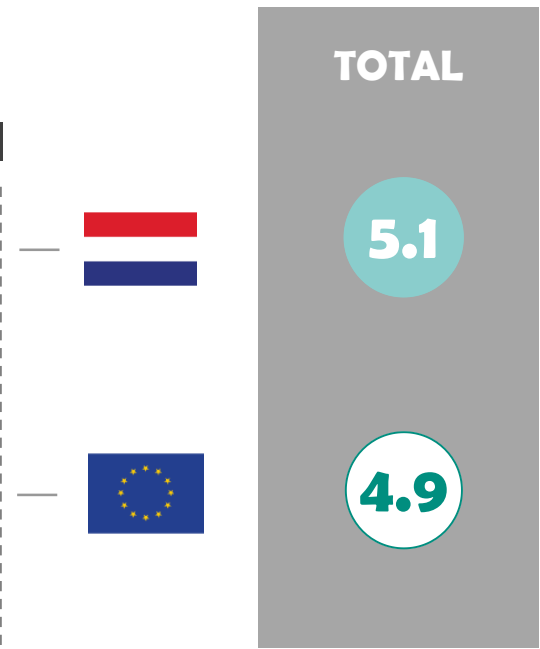


And can you please tell us the total number of LCVs or vans in your fleet?
Basis: companies with corporate vehicles = 100%

VEHICLES POSSESSION LENGTH



AVERAGE IN YEARS



↑ 4.1

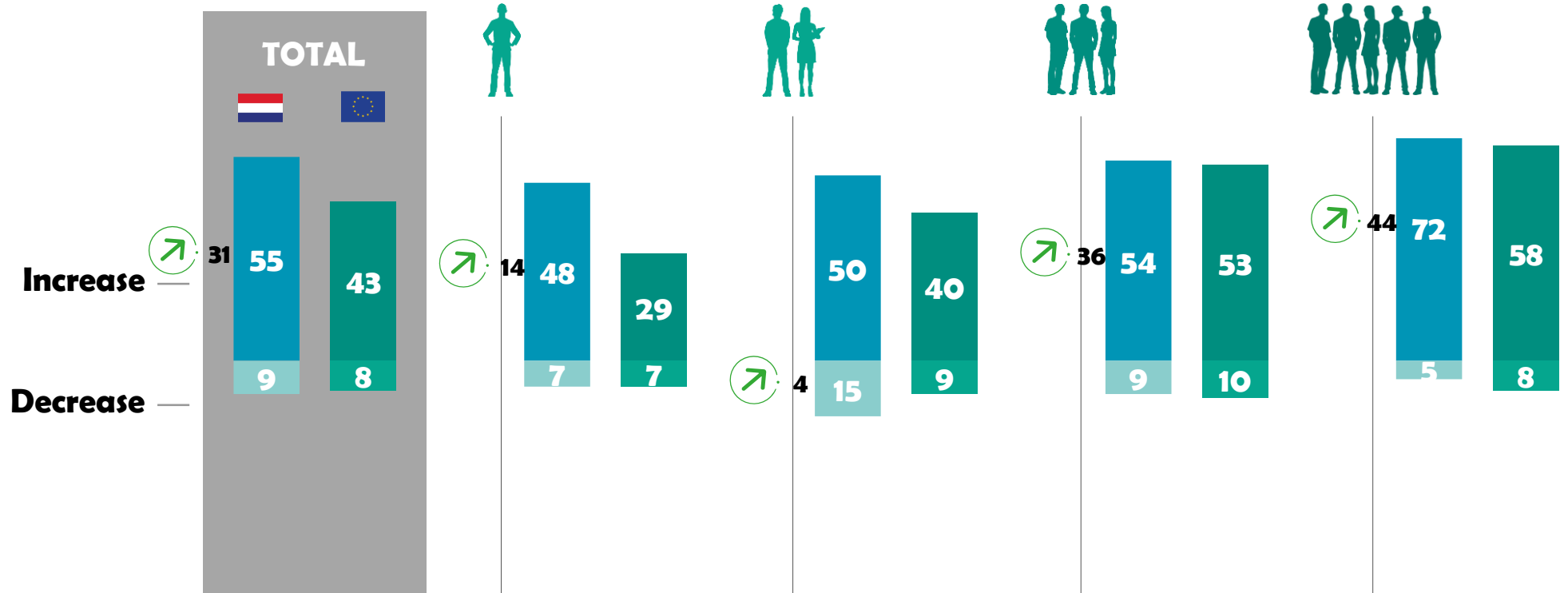
*On average, how long do you keep your vehicles (before being sold or giving back to the leasing company)?
Basis: companies with corporate vehicles = 100%*

FLEET GROWTH POTENTIAL

In %



Passenger cars + LCVs



BALANCE in pts (INCREASE ⊖ DECREASE)



2021	+46	+35	+41	+22	+35	+31	+44	+43	+67	+50
2020	+24	+20	+9	+12	+36	+23	+23	+24	+38	+25

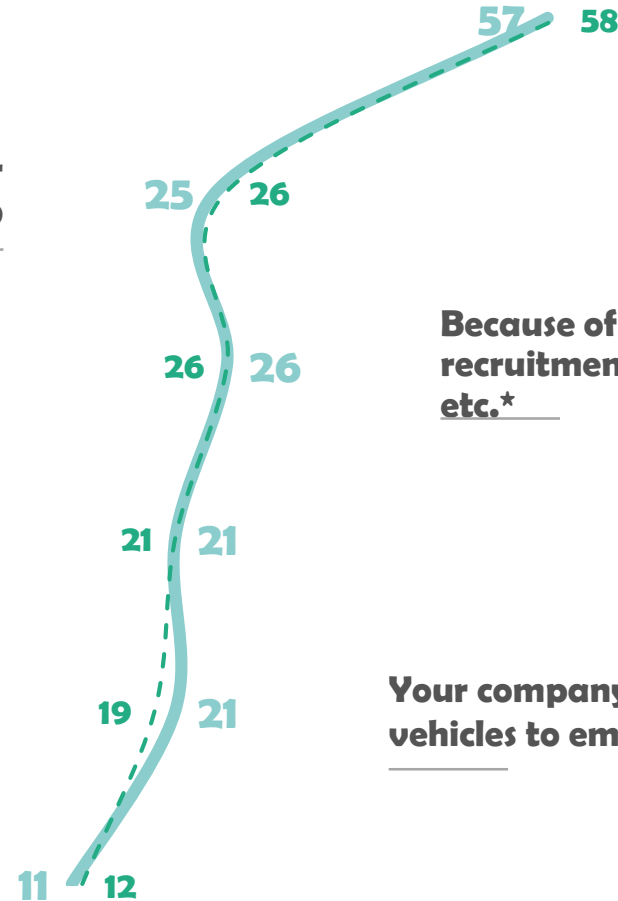
*In the next three years, do you think that the total number of vehicles in your company fleet will increase, decrease or remain the same?
Basis: companies with corporate vehicles = 100%*

REASONS FOR FLEET FUTURE INCREASE

In %



Passenger cars + LCVs



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

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

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

Your company plans to propose vehicles to employees with no company car eligibility

Your company plans to propose shared vehicles to employees

Because of tax decreases

**This item has changed, no comparison vs previous year*

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

4

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



INSIGHT 2: ALTERNATIVE TECHNOLOGIES ADOPTION IS ACCELERATING, STRENGTHENING THE NETHERLANDS' POSITION AS A LEADER.

1

- **As previous years, the Netherlands remains one of the most advanced market in the adoption of alternative technologies and is expected to keep its position as a leader in the next years, regardless the company size:**
 - **8 companies out of 10 already have implemented or consider to implement at least one alternative technology in the next 3 years (among which 6 out of 10 already have).**

2

- **Concerning electric technologies, in more details:**
 - **Within medium and large companies (100 or more employees), more than 8 out of 10 are already equipped with PHEV, HEV or BEV or plan to do in the next years.**
 - **Within smaller companies (less than 100 employees), they are almost 7 out of 10.**

3

- **Apart from environmental considerations which remain strong, this development of alternative technologies mainly relies on:**
 - **Opportunities of savings (reduced fuel expenses)**
 - **Legal compliances (anticipate future restrictive public policies, be able to drive in Low Emission Zone)**
 - **Companies' corporate image issues & CSR policy compliance**

It is also a response to employees' request.

In parallel, BEV usage is also progressing thanks to lower barriers than last year notably regarding charging points, price (BEV are still attractive despite lower tax incentives) and range of models.

EXPECTED SHARE OF 100% BATTERY ELECTRIC (NEXT 3 YEARS)

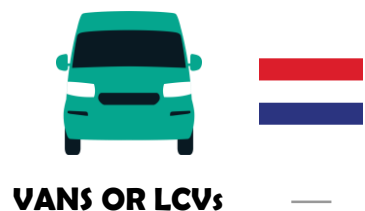
In %



49



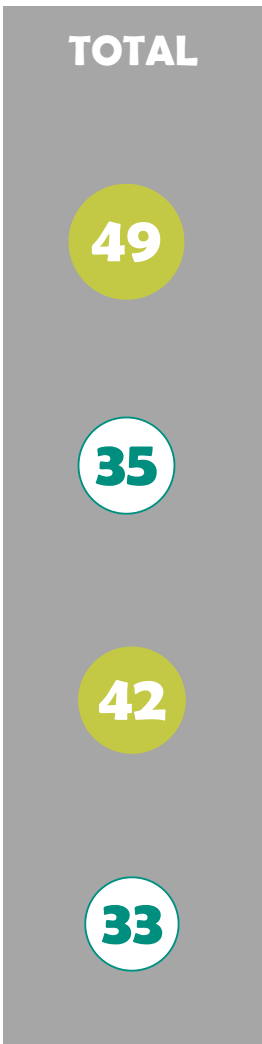
35



42



33



*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

In %



Passenger cars + LCVs

HOW TO READ THE RESULTS?

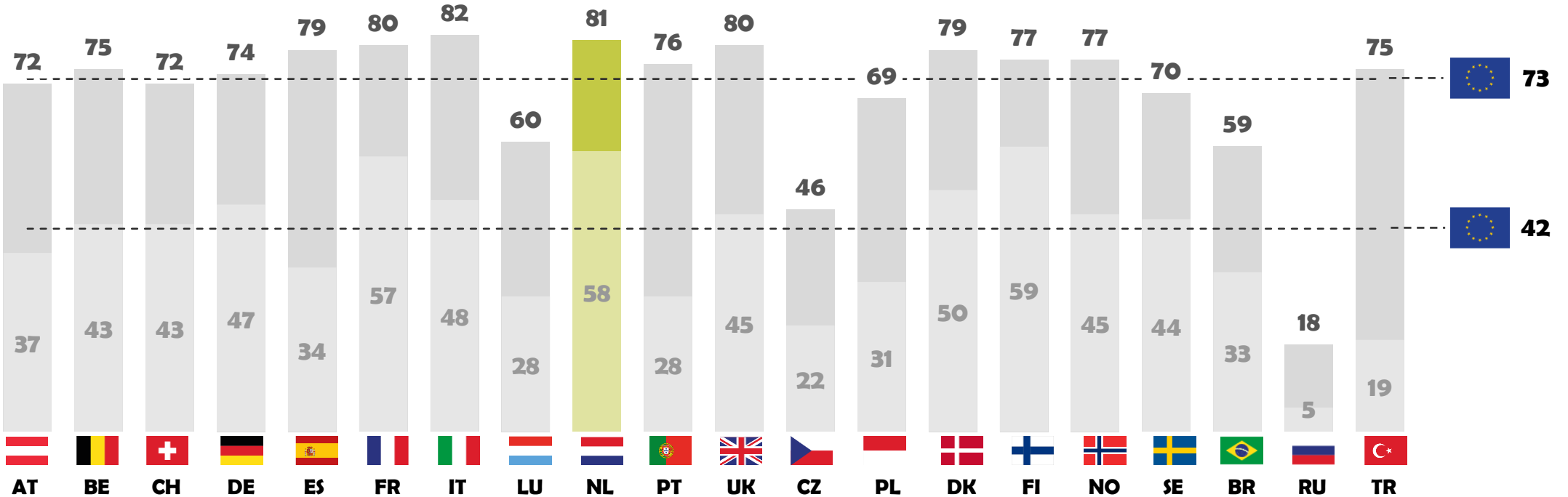
In the Netherlands, 81% of the companies have already implemented or consider to implement at least one alternative technology in the next 3 years. 58% have already implemented at least one.



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY IMPLEMENTED



*Amongst the following alternative fuel technologies, which ones do you use or are you considering using...?
Response scale: Already implemented, considered in the next 3 years, considered but later, not interested
Basis: companies with corporate vehicles = 100%*

CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

At least one technology

In %



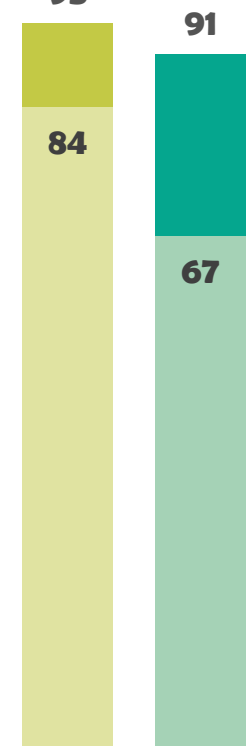
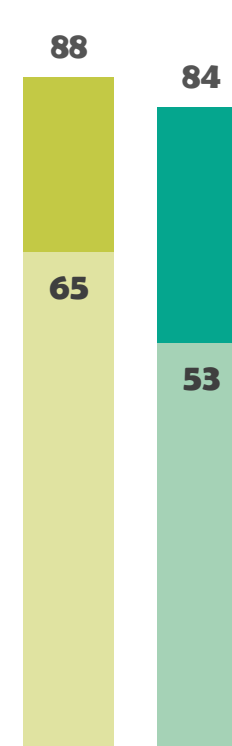
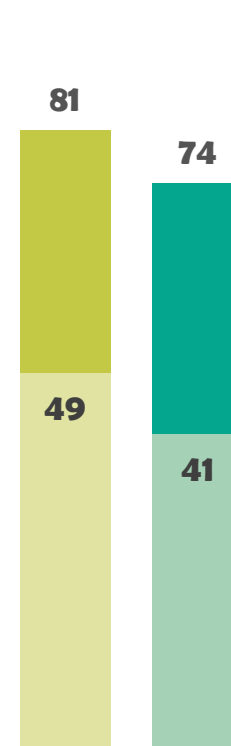
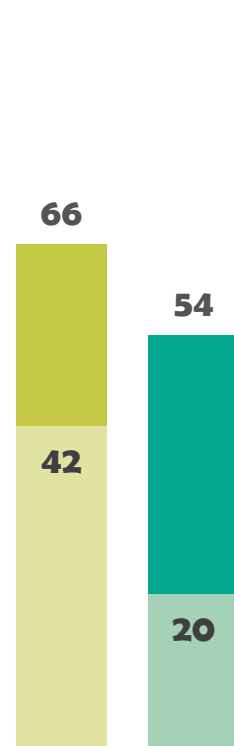
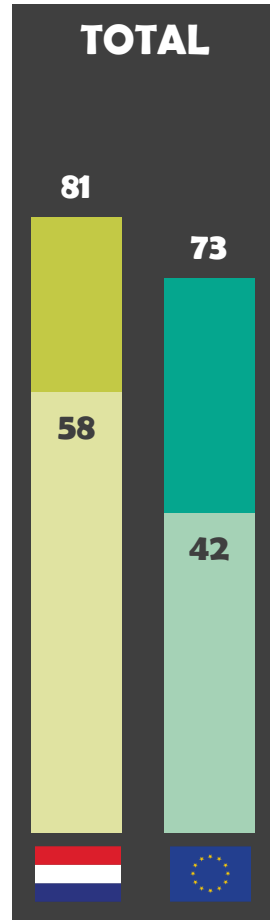
Passenger cars + LCVs



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY IMPLEMENTED



Amongst the following alternative fuel technologies, which ones do you use or are you considering using...?
 Response scale: Already implemented, considered in the next 3 years, considered but later, not interested
 Basis: companies with corporate vehicles = 100%

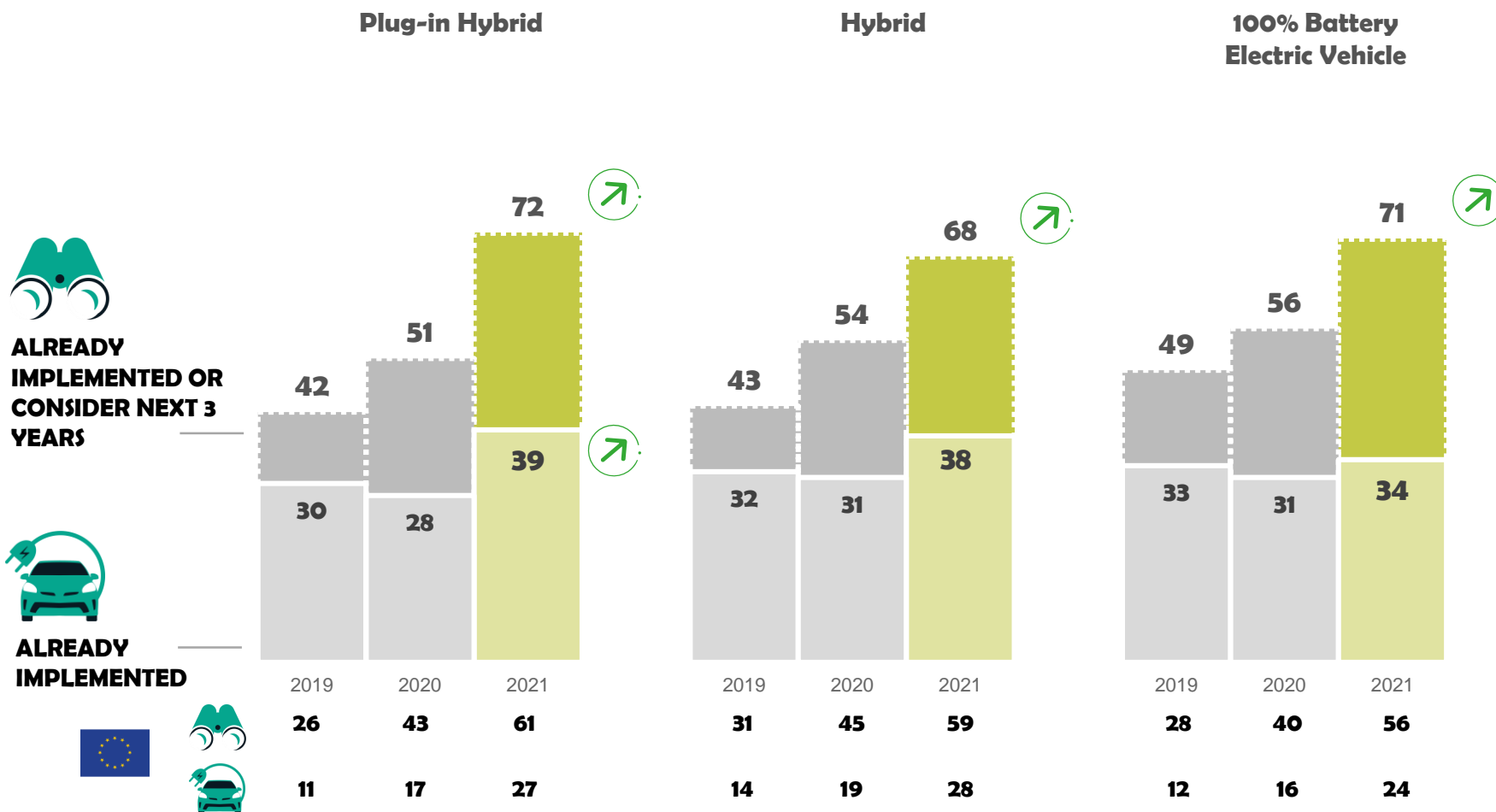
ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years

In %



Passenger cars + LCVs



Amongst the following alternative fuel technologies, which ones do you use or are you considering using...?
 Response scale: Already implemented, considered in the next 3 years, considered but later, not interested
 Basis: companies with corporate vehicles

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years – Focus on 1 to 99

In %



Passenger cars + LCVs

Plug-in Hybrid

Hybrid

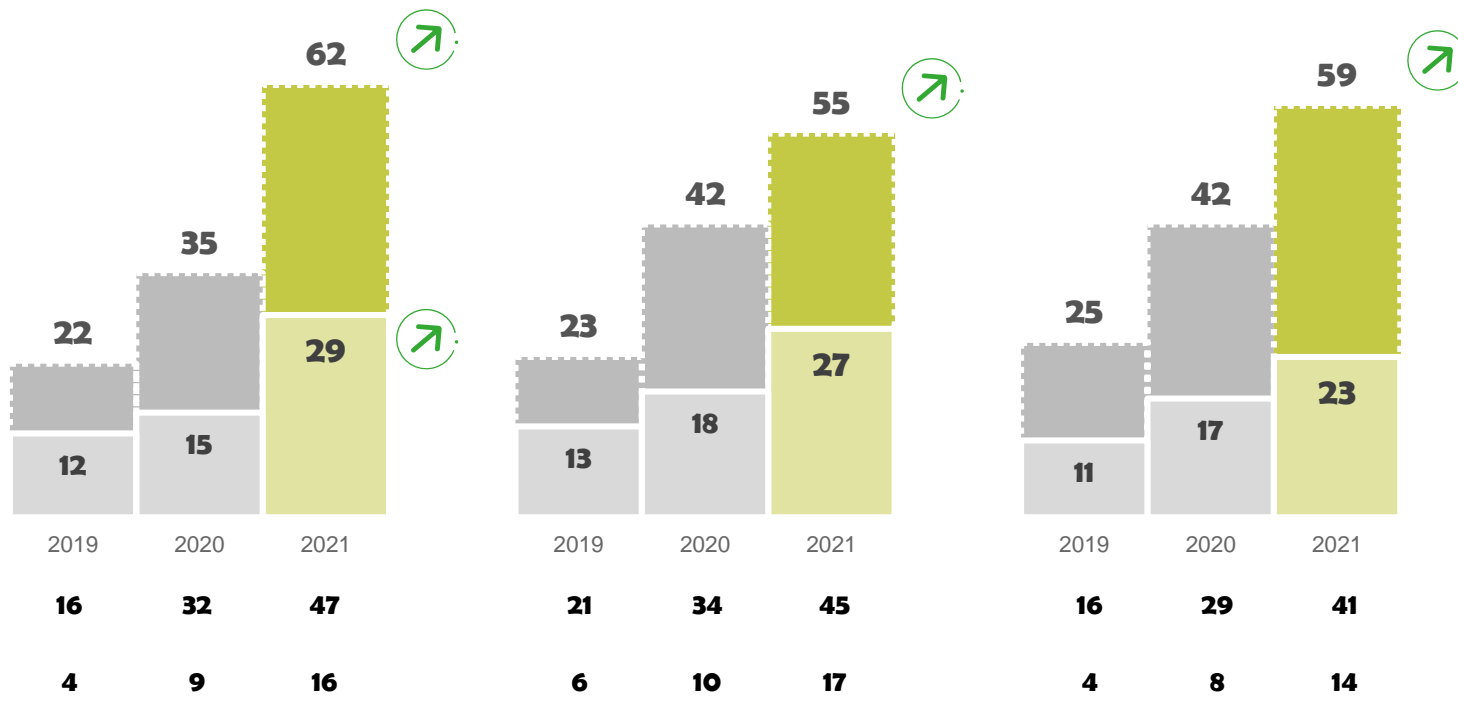
100% Battery Electric Vehicle



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY IMPLEMENTED



Amongst the following alternative fuel technologies, which ones do you use or are you considering using...?
 Response scale: Already implemented, considered in the next 3 years, considered but later, not interested
 Basis: companies with corporate vehicles

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years – Focus on 100 and more

In %



Passenger cars + LCVs



+



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



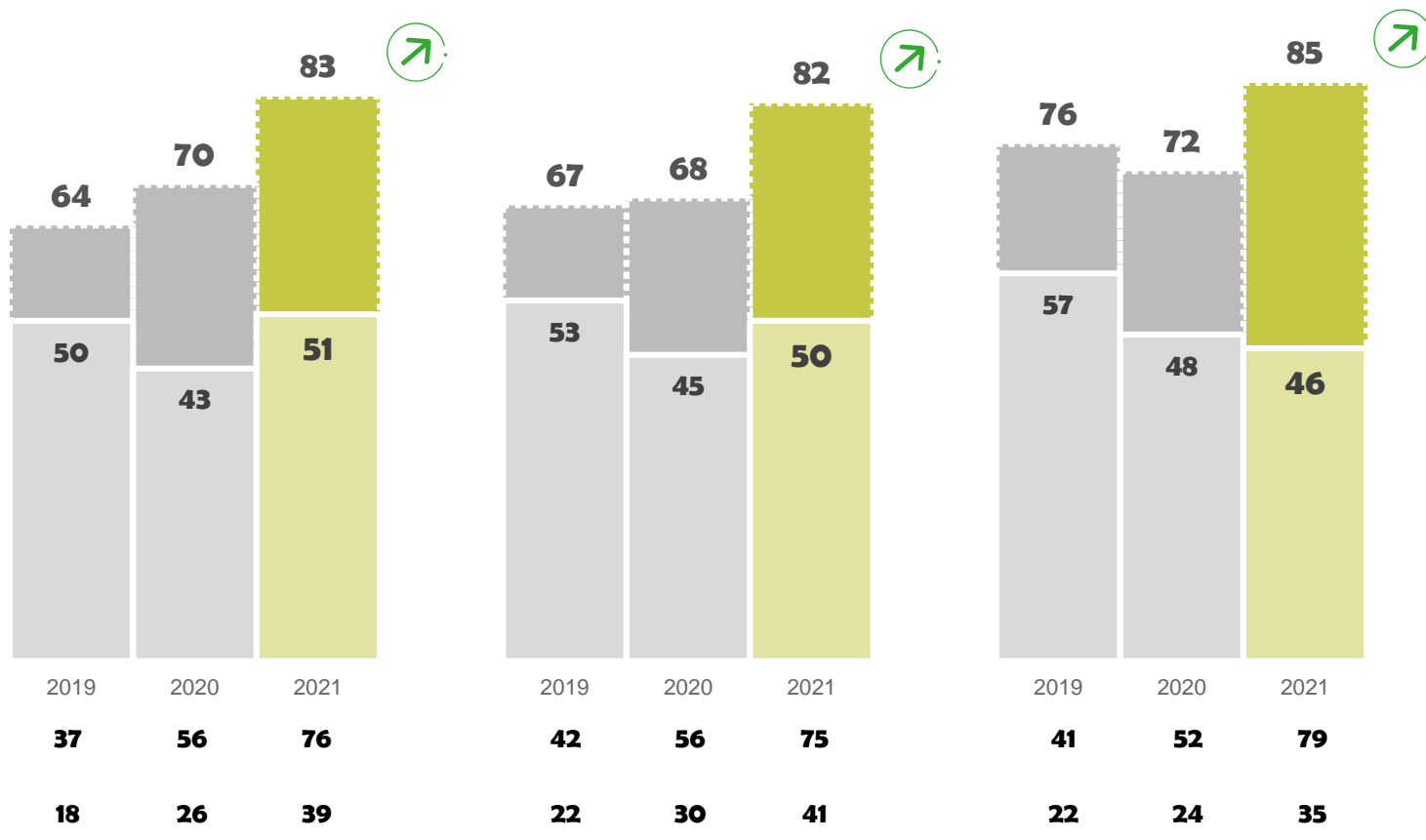
ALREADY IMPLEMENTED



Plug-in Hybrid

Hybrid

100% Battery Electric Vehicle



Amongst the following alternative fuel technologies, which ones do you use or are you considering using...?
 Response scale: Already implemented, considered in the next 3 years, considered but later, not interested
 Basis: companies with corporate vehicles

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Passenger car fleet

In %



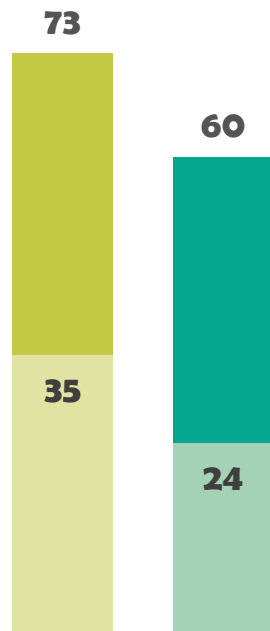
Passenger cars



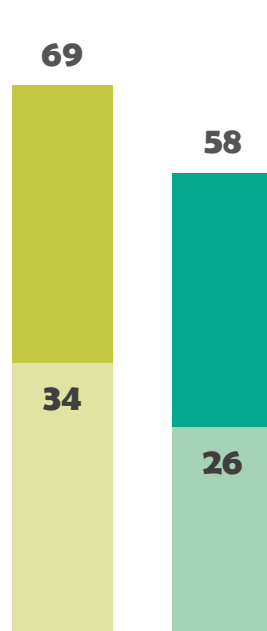
ALREADY
IMPLEMENTED OR
CONSIDER NEXT 3
YEARS



ALREADY
IMPLEMENTED



Plug-in Hybrid



Hybrid



100% Battery
Electric Vehicle

Amongst the following alternative fuel technologies, which ones do you use or are you considering using...?
Response scale: Already implemented, considered in the next 3 years, considered but later, not interested
Basis: companies with corporate passenger cars

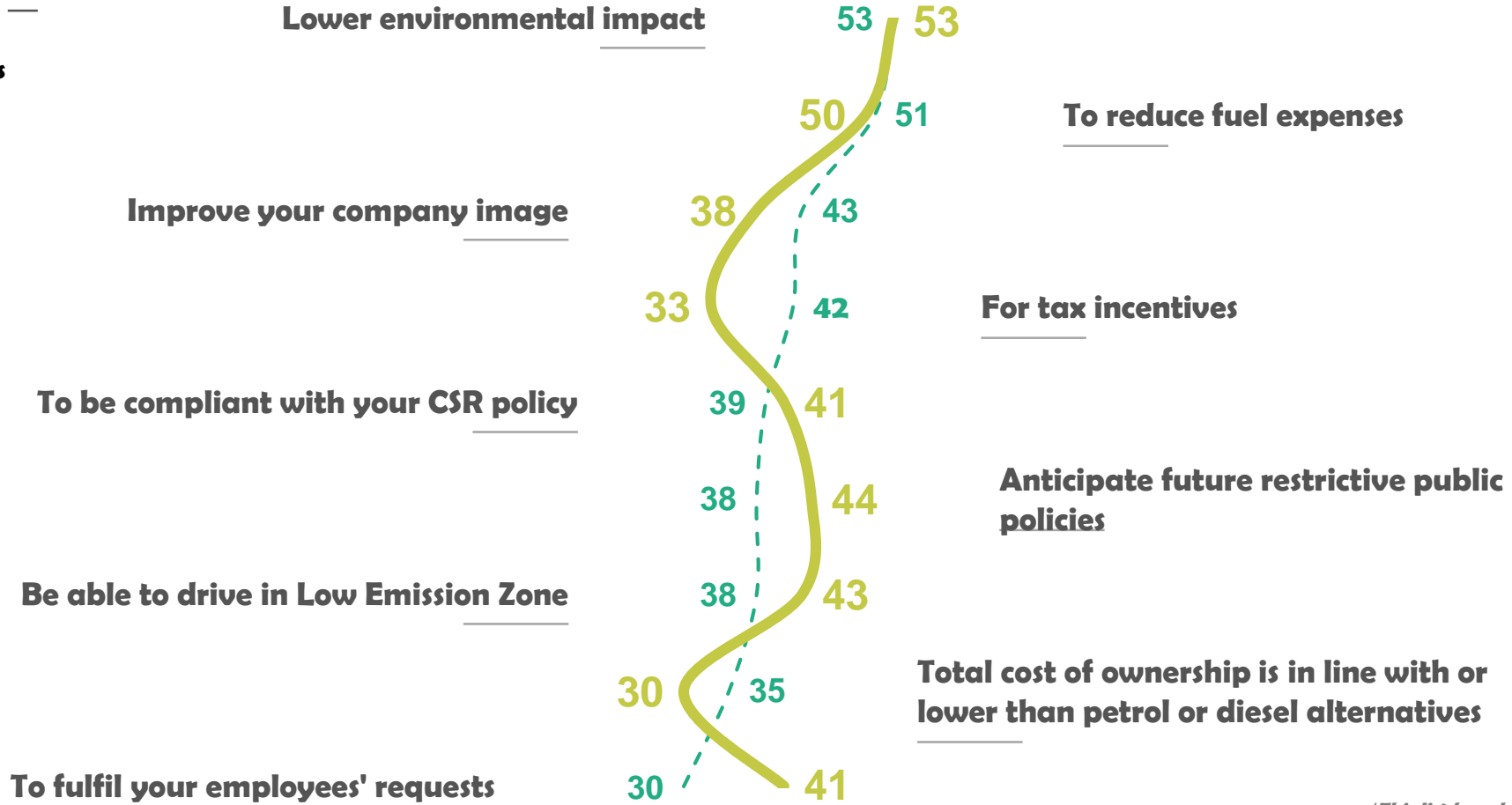
REASONS FOR IMPLEMENTING OR CONSIDERING ALTERNATIVE FUEL TECHNOLOGIES

Passenger car fleet

In %



Passenger cars



**This list has changed, no comparison vs previous year*

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

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

LCV Fleet

In %



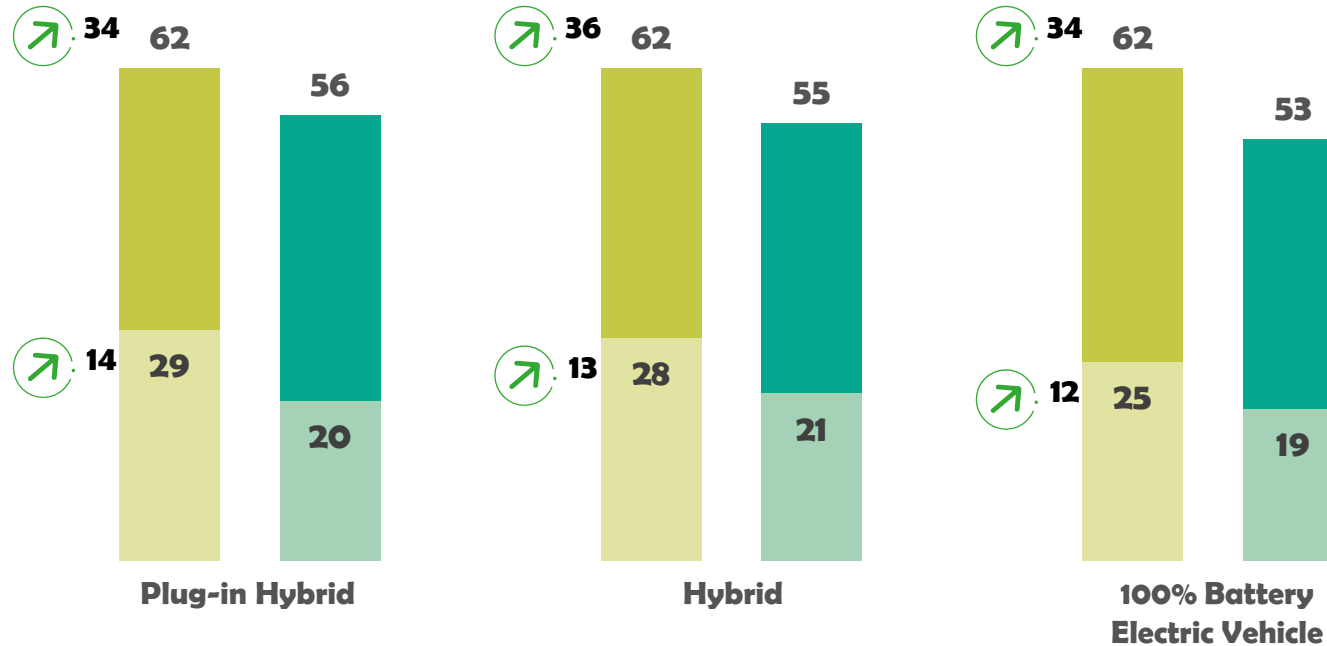
LCVs



**ALREADY
IMPLEMENTED OR
CONSIDER NEXT 3
YEARS**



**ALREADY
IMPLEMENTED**



*Amongst the following alternative fuel technologies, which ones do you use or are you considering using...?
Response scale: Already implemented, considered in the next 3 years, considered but later, not interested
Basis: companies with corporate LCVs*

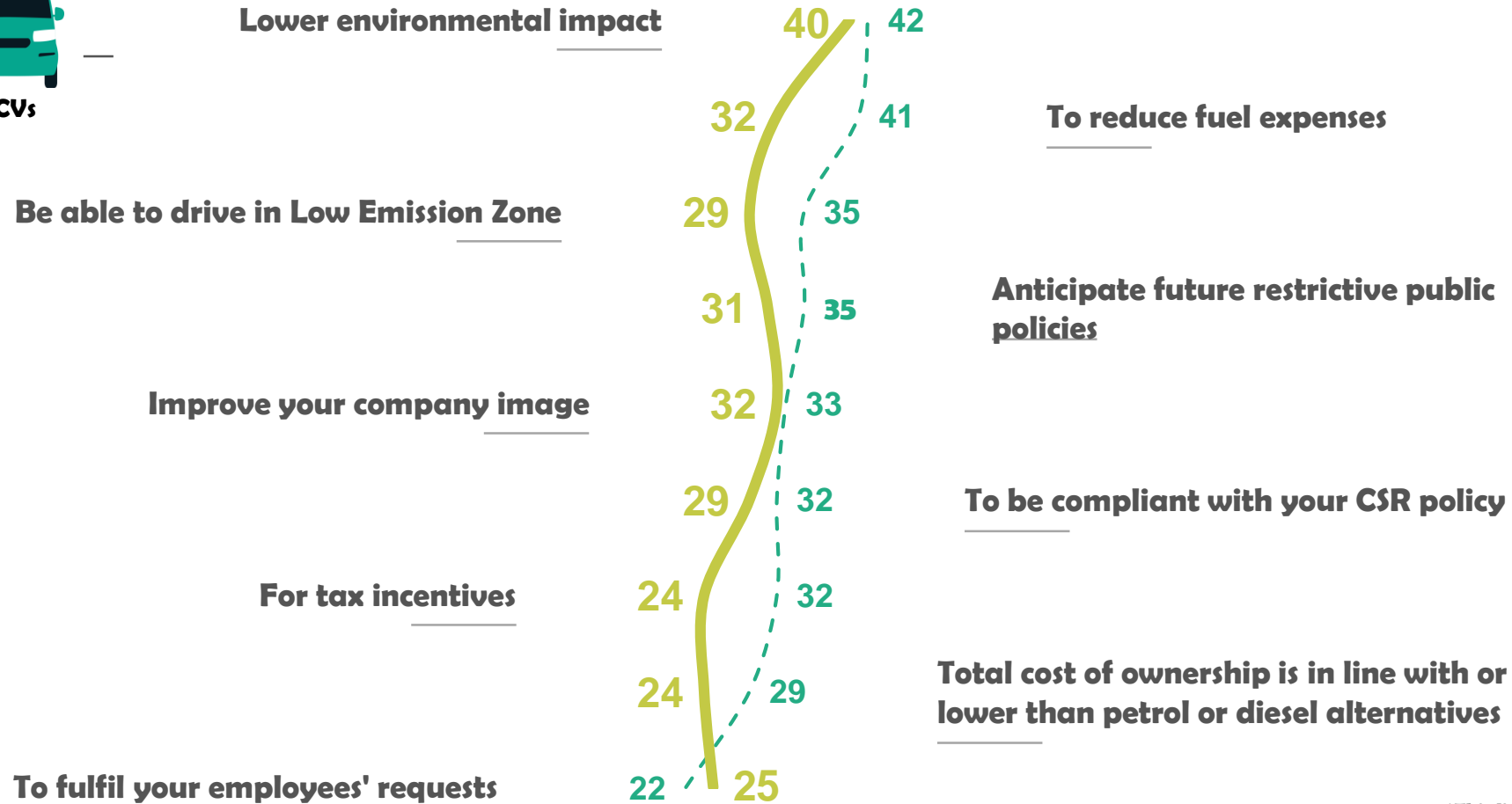
REASONS FOR IMPLEMENTING OR CONSIDERING ALTERNATIVE FUEL TECHNOLOGIES

LCV fleet

In %



LCVs



**This list has changed, no comparison vs previous year*

*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 LCVs*

4

ENERGY MIX FOCUS PER ALTERNATIVE TECHNOLOGY



HYBRID IMPLEMENTATION

In %



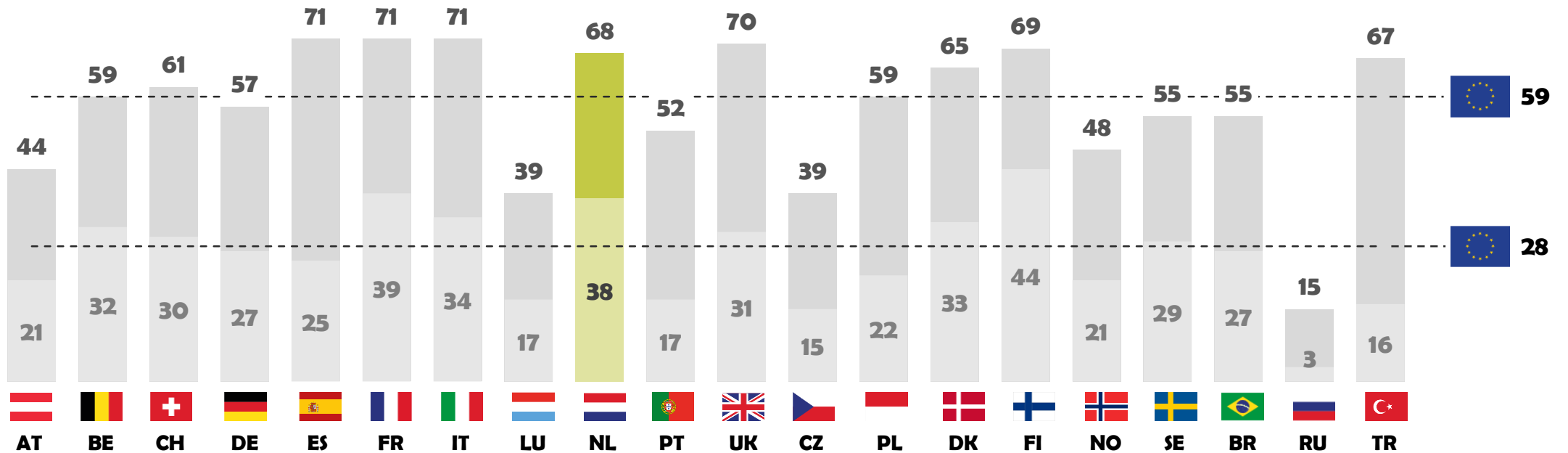
Passenger cars + LCVs



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY IMPLEMENTED



Amongst the following alternative fuel technologies, which ones do you use or are you considering using...?
 Response scale: Already implemented, considered in the next 3 years, considered but later, not interested
 Basis: companies with corporate vehicles = 100%

HYBRID IMPLEMENTATION

In %



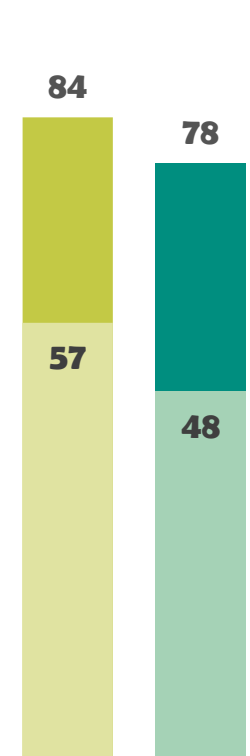
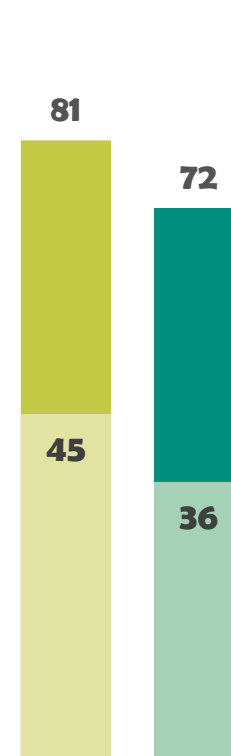
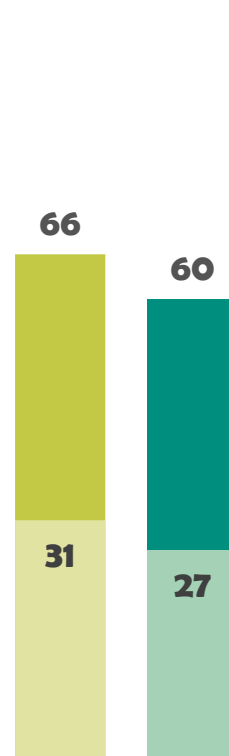
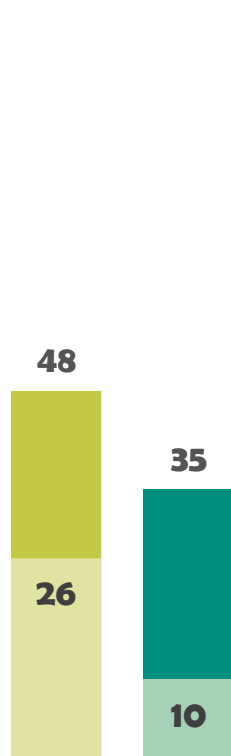
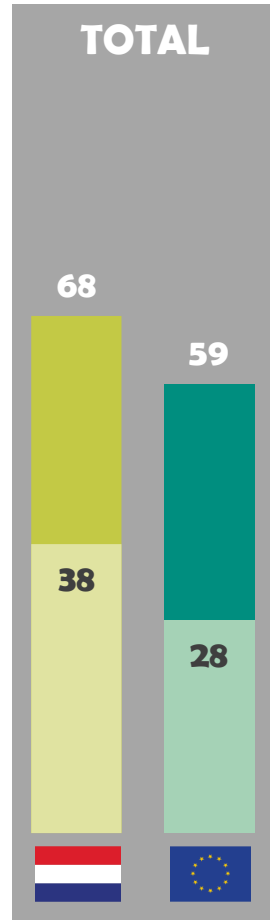
Passenger cars + LCVs



**ALREADY
IMPLEMENTED OR
CONSIDER NEXT 3
YEARS**



**ALREADY
IMPLEMENTED**



*Amongst the following alternative fuel technologies, which ones do you use or are you considering using...?
Response scale: Already implemented, considered in the next 3 years, considered but later, not interested
Basis: companies with corporate vehicles = 100%*

PLUG-IN HYBRID IMPLEMENTATION

In %



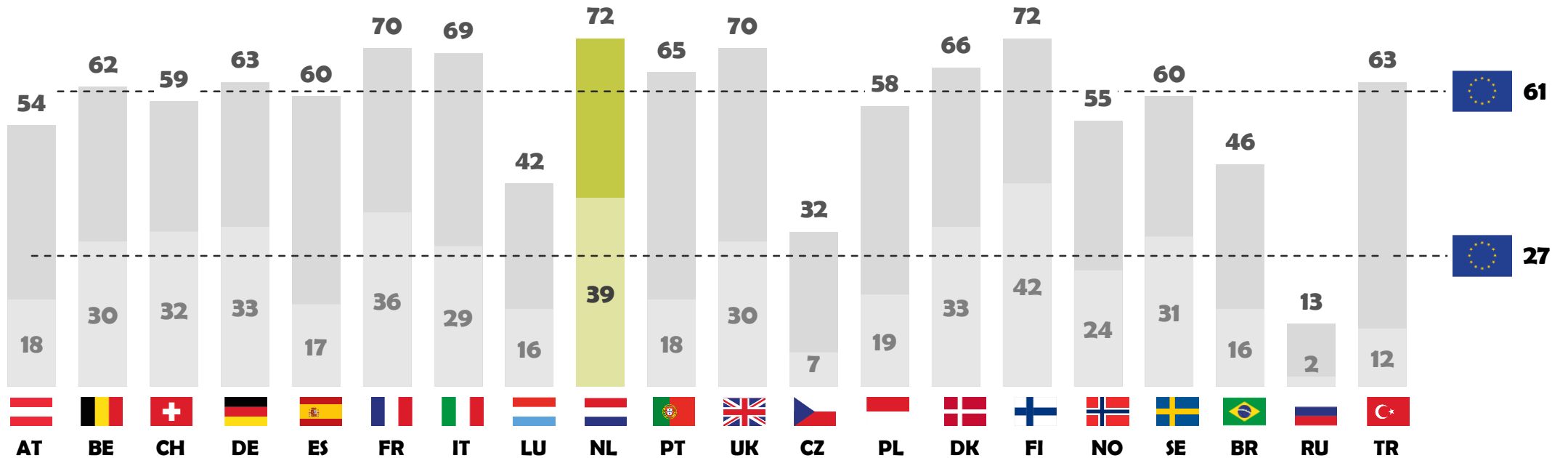
Passenger cars + LCVs



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY IMPLEMENTED



Amongst the following alternative fuel technologies, which ones do you use or are you considering using...?
 Response scale: Already implemented, considered in the next 3 years, considered but later, not interested
 Basis: companies with corporate vehicles = 100%

PLUG-IN HYBRID IMPLEMENTATION

In %



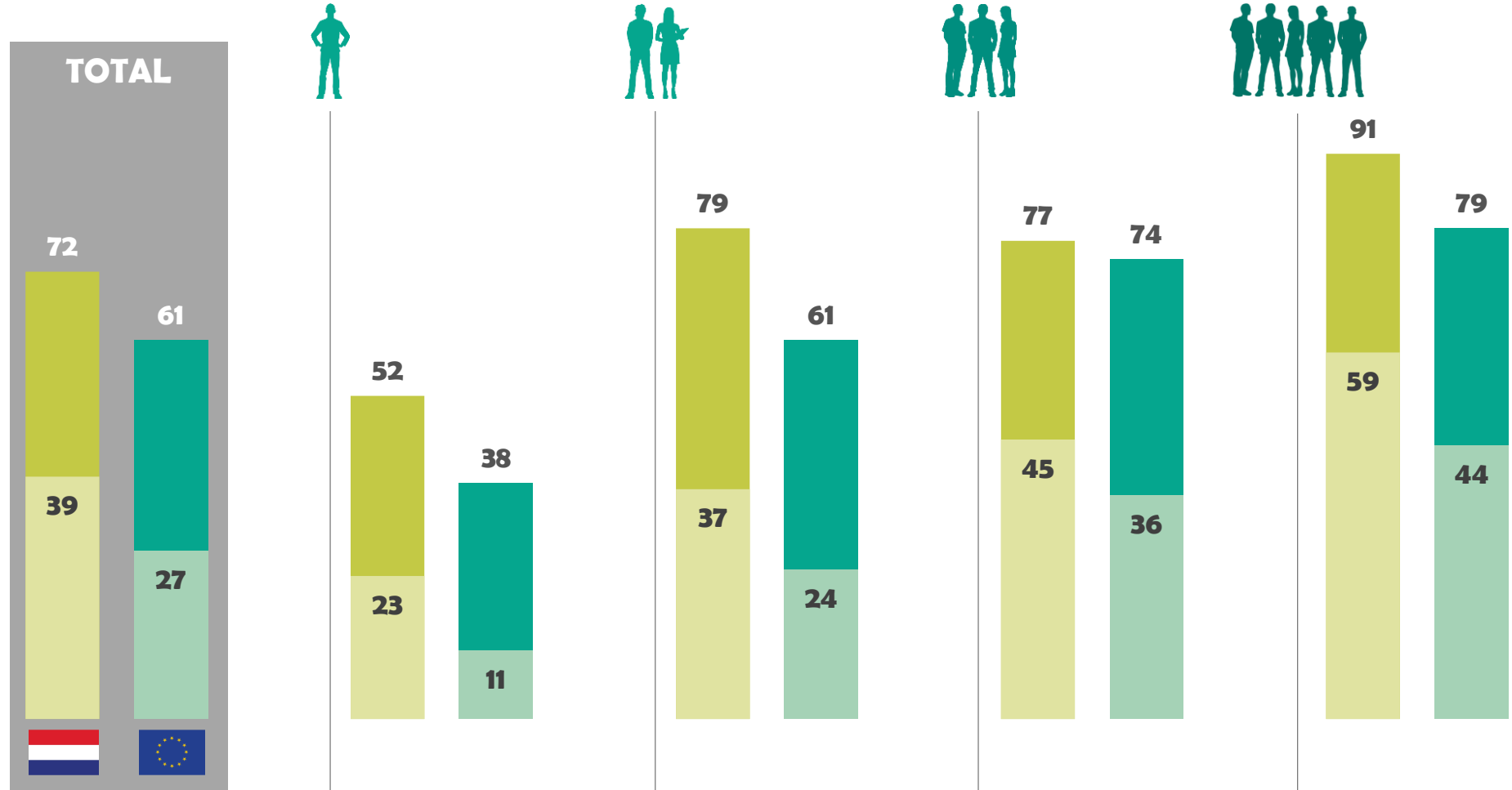
Passenger cars + LCVs



**ALREADY
IMPLEMENTED OR
CONSIDER NEXT 3
YEARS**



**ALREADY
IMPLEMENTED**



*Amongst the following alternative fuel technologies, which ones do you use or are you considering using...?
Response scale: Already implemented, considered in the next 3 years, considered but later, not interested
Basis: companies with corporate vehicles = 100%*

100% BATTERY ELECTRIC IMPLEMENTATION

In %



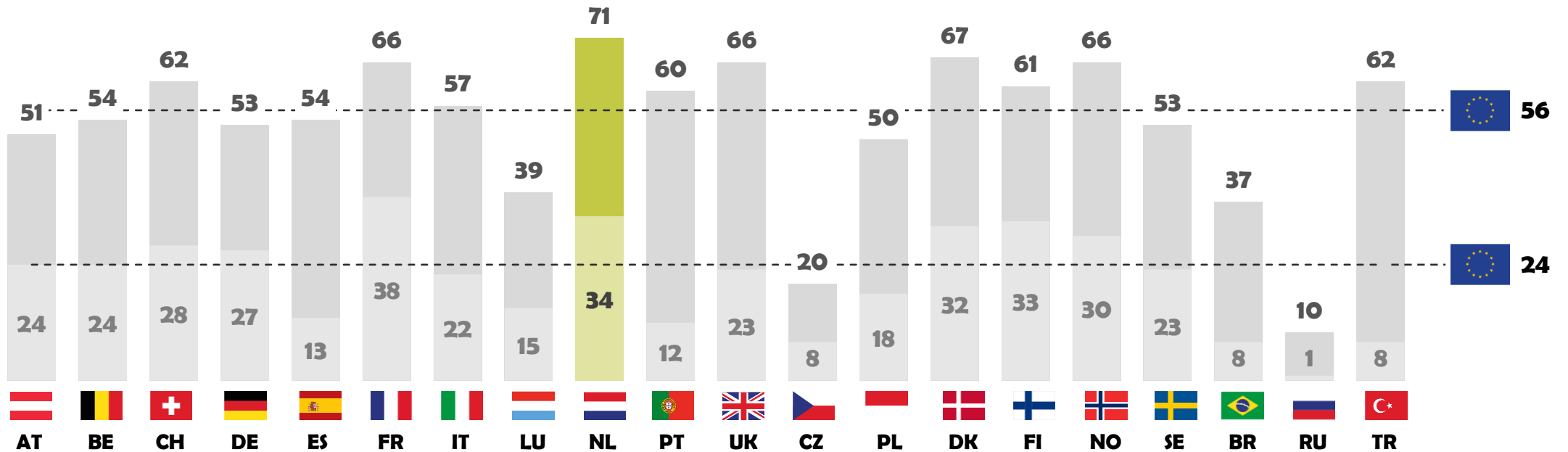
Passenger cars + LCVs



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS

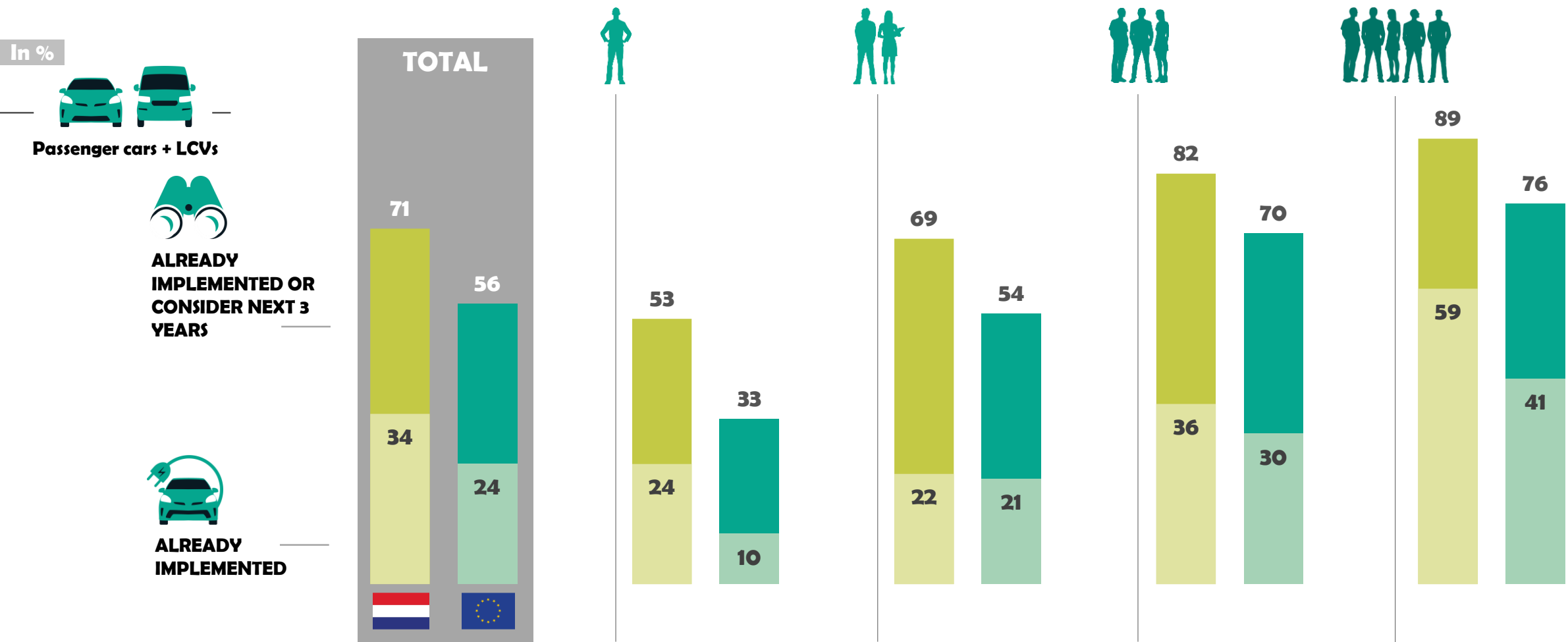


ALREADY IMPLEMENTED



Amongst the following alternative fuel technologies, which ones do you use or are you considering using...?
 Response scale: Already implemented, considered in the next 3 years, considered but later, not interested
 Basis: companies with corporate vehicles = 100%

100% BATTERY ELECTRIC IMPLEMENTATION



Amongst the following alternative fuel technologies, which ones do you use or are you considering using...?
 Response scale: Already implemented, considered in the next 3 years, considered but later, not interested
 Basis: companies with corporate vehicles = 100%

CONSTRAINTS OF 100% BATTERY ELECTRIC IMPLEMENTATION

In %



Passenger cars + LCVs

do not consider implementing battery electric vehicles

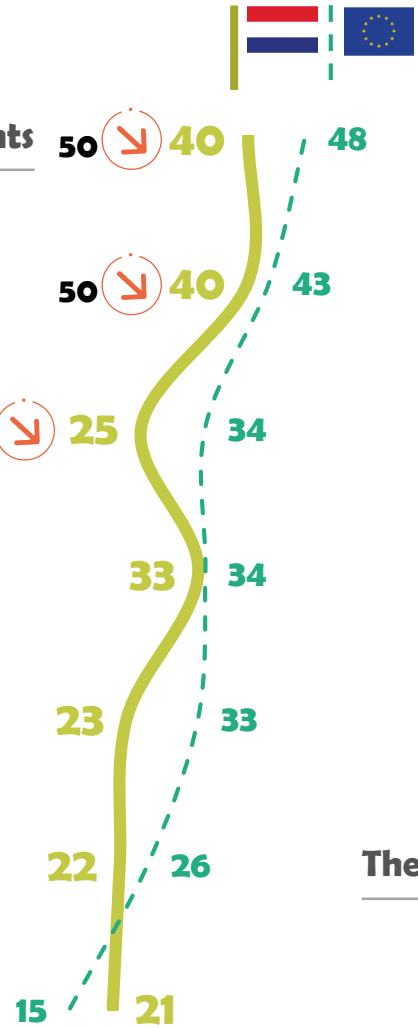
10

The number of public charging points

The range of models is limited for this type of vehicles

No charging points at your company offices

Your employee's reluctance to drive such vehicles



The purchase price is higher than a regular fuel car

No charging solutions at your employees' home

The questions raised on their reliability

*What are the constraints of using 100% Battery Electric vehicles?
Basis: companies not considering 100% battery electric vehicles*

INSTALLATION OF CHARGING POINTS

In %



Passenger cars + LCVs

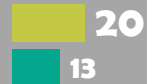
No charging points installed at the company premises



Charging points installed and free charging for drivers



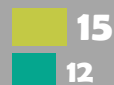
Charging points installed and drivers charged for charging



Charging points are planned to be installed in the next 12M



Company subsidizes cost of home installations for drivers



Drivers have to pay for home installation of charging points



TOTAL



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

5

WHAT ARE THE PERSPECTIVES IN TERMS OF ALTERNATIVE MOBILITY SOLUTIONS?



INSIGHT 3: INDIVIDUAL SOLUTIONS ARE BOOSTED BY THE HEALTH CONTEXT, YET SHARED SOLUTIONS REMAIN SOURCE OF INTEREST FOR THE 'AFTER COVID-19'.

1

• **This year more than ever, the crisis has contributed to turning mobility into a strategic topic on the short / mid-term: offering alternative mobility solutions to their employees has been a real challenge for companies, for understandable reasons of health safety.**

In this context, the use of alternative mobility solutions has developed, regardless the company size. Notably:

- **Individual car solutions like private lease/salary sacrifice (40%, +21pts), as a response to the strong need for quick and flexible solutions in reaction to the fast-moving health situation.**
- **Mobility budget is also showing sensible progression in usages. Meantime, companies are also more and more interested in proposing a mobility budget to their employees, mainly to offer them more options and flexibility regarding mobility.**

2

• **But beyond the specific health context, fleet managers also tend to project themselves out of the crisis, rethinking more broadly their mobility offer to meet their employees' needs and face higher fleet costs but also considering environmental impacts:**

- **3 Dutch companies out of 4 have a specific strategy on the mobility CO2 footprint or consider to in the next years**

Thus, they also show an increasing interest for shared mobility solutions:

- **Public Transport: 68% already or consider using it in the next 3 years (+24 pts)**
- **Ride sharing: 67% (+ 21 pts)**
- **Corporate car sharing: 67% (+29 pts)**

3

• **In this context, app to book mobility solutions is also showing a very important potential for the future.**

Lastly, fleet & mobility managers predict a bright future to these alternative solutions, as 6 out of 10 even think that their company car drivers will exchange all or part of their company car benefit for such alternatives in the coming years.

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 (Blablacar, Togethr)



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

AT LEAST ONE ALTERNATIVE ALREADY IMPLEMENTED

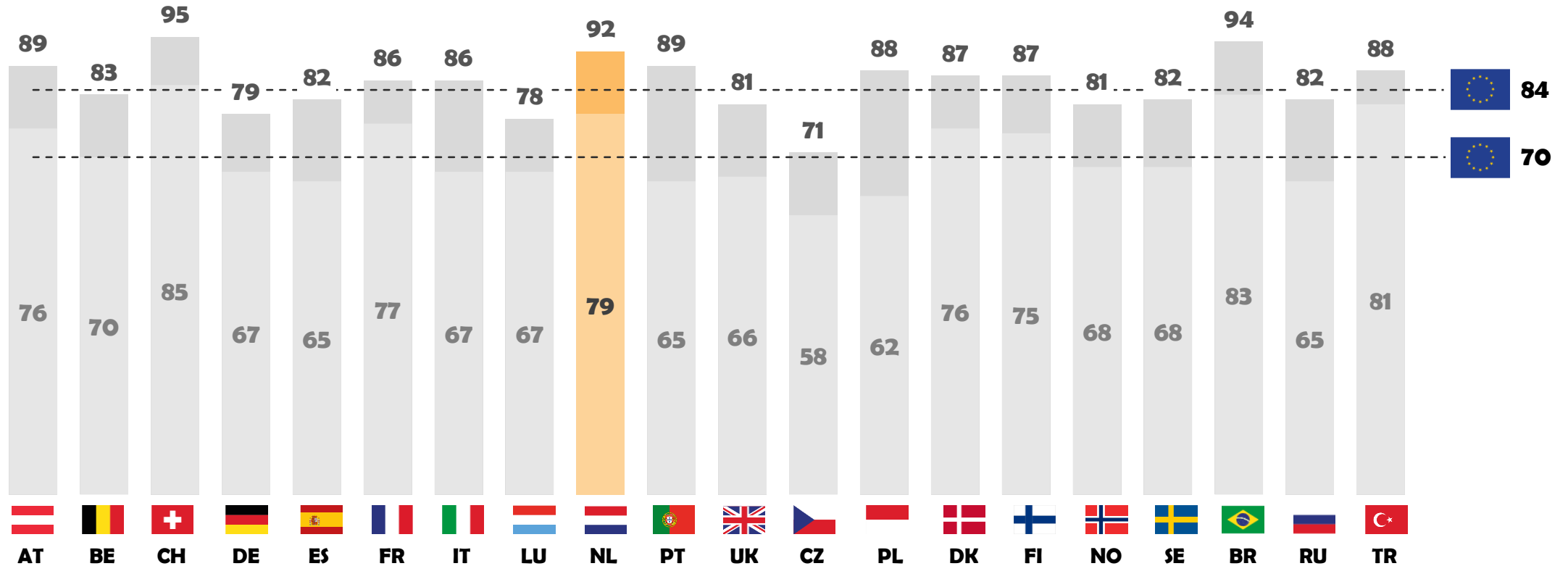
In %



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY USING



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

ALTERNATIVE MOBILITY IMPLEMENTATION – AT LEAST ONE ALREADY IMPLEMENTED

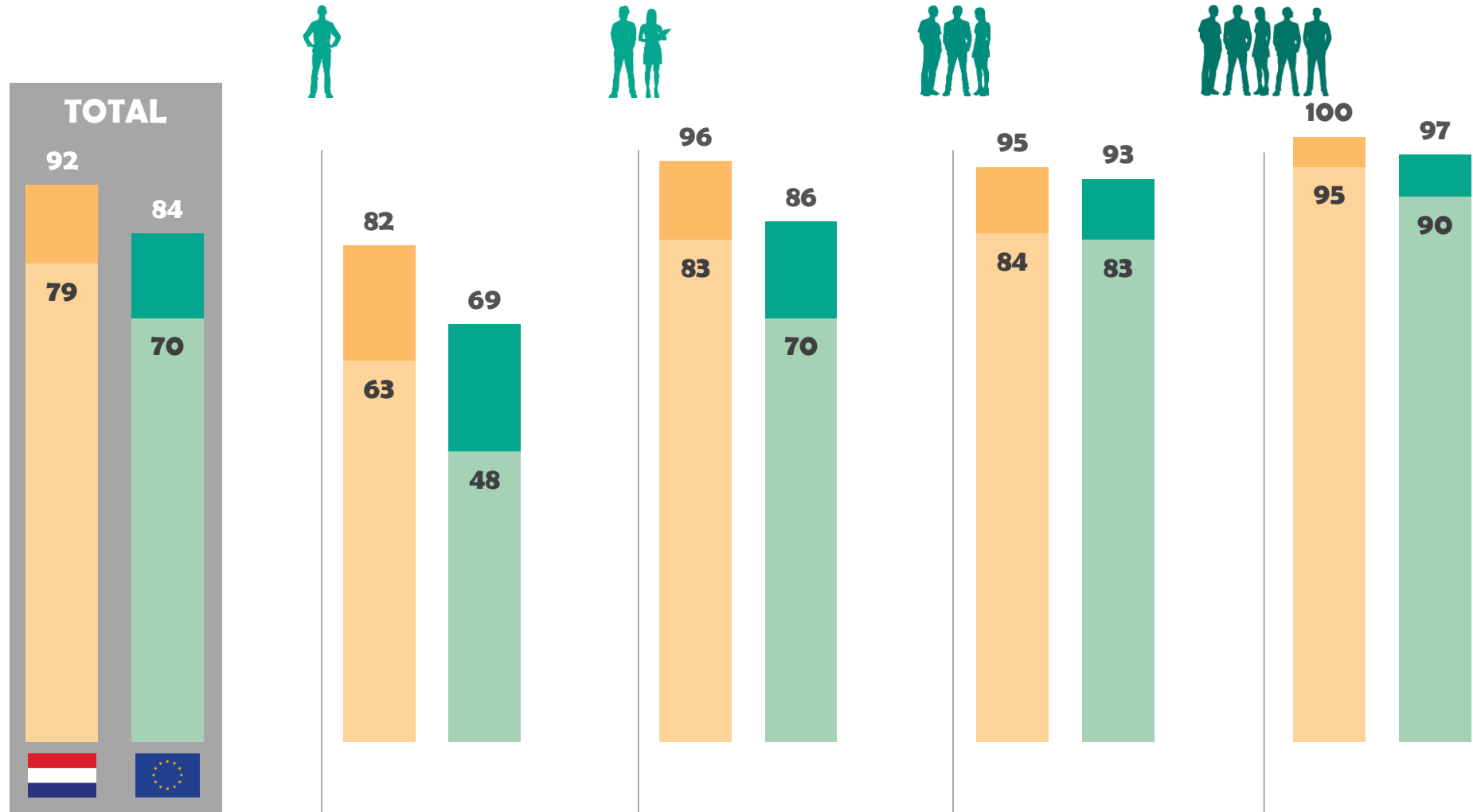
In %



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY USING



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

OVERVIEW OF ALTERNATIVE MOBILITY SOLUTIONS IMPLEMENTATION

In %

79%

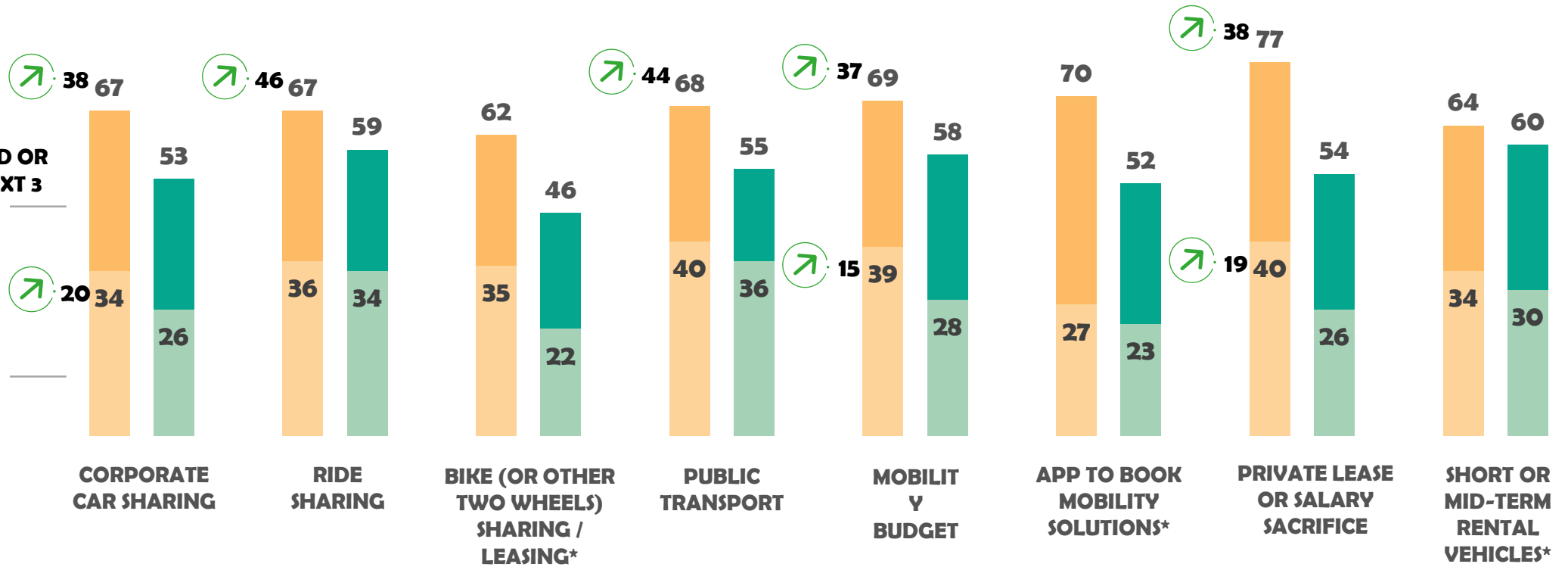
Of companies have already implemented at least one of these solutions



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY USING



*This item has changed, no comparison vs previous year

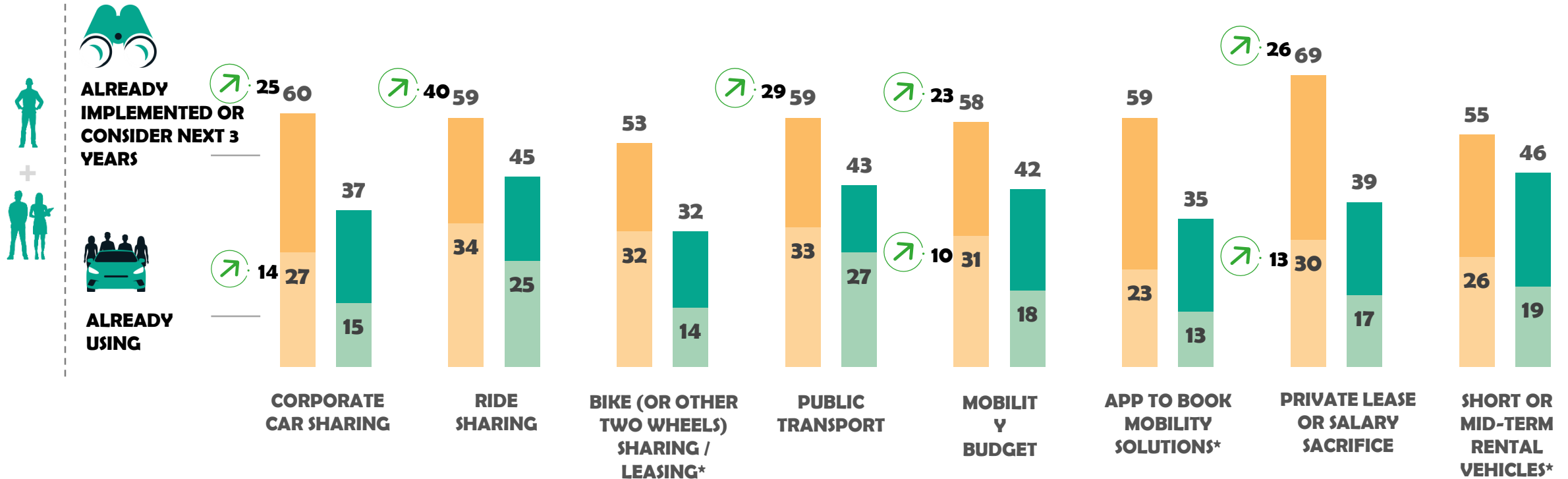
Which of the following have you implemented or will you implement in the next 3 years?
 Response scale: Already using, considered in the next 3 years, not interested
 Basis: companies with corporate vehicles = 100%

OVERVIEW OF ALTERNATIVE MOBILITY SOLUTIONS IMPLEMENTATION

Focus on 1 to 99

71%

Of companies have already implemented at least one of these solutions



**This item has changed, no comparison vs previous year*

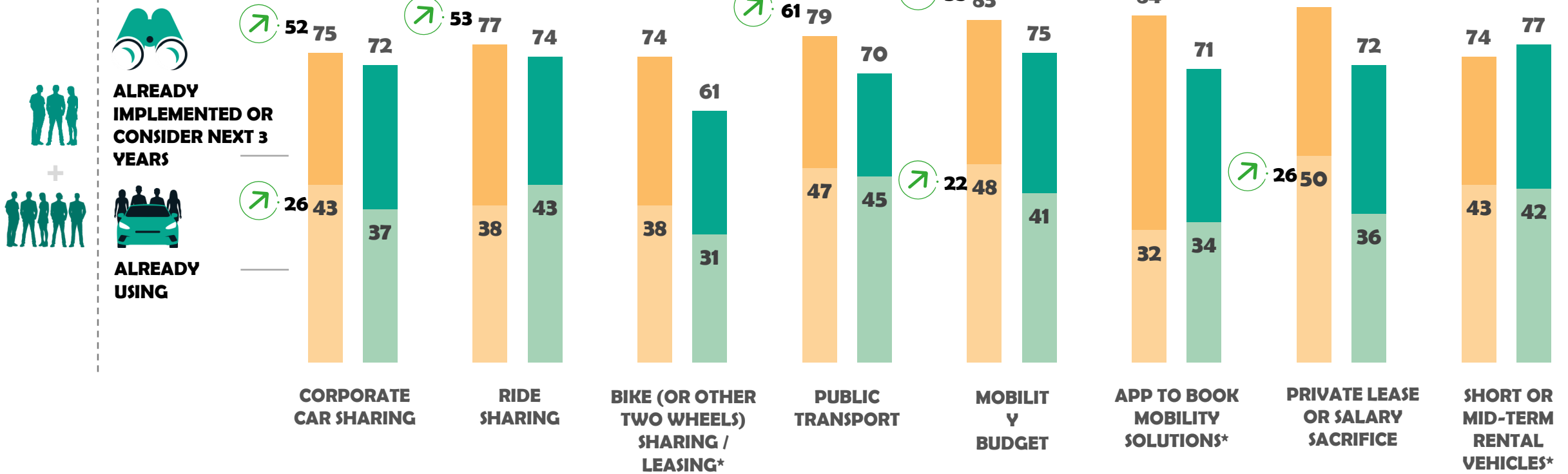
*Which of the following have you implemented or will you implement in the next 3 years?
 Response scale: Already using, considered in the next 3 years, not interested
 Basis: companies with corporate vehicles = 100%*

OVERVIEW OF ALTERNATIVE MOBILITY SOLUTIONS IMPLEMENTATION

Focus on 100 and more

89%

Of companies have already implemented at least one of these solutions



*This item has changed, no comparison vs previous year

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%

CORPORATE CAR SHARING IMPLEMENTATION

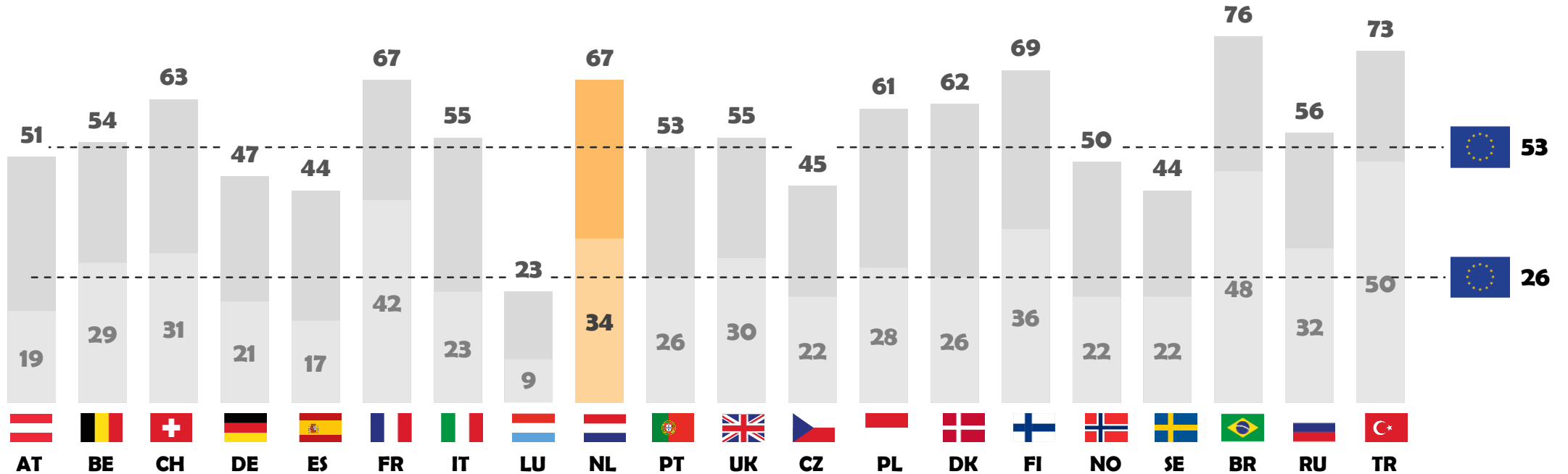
In %



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY USING



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

CORPORATE CAR SHARING IMPLEMENTATION

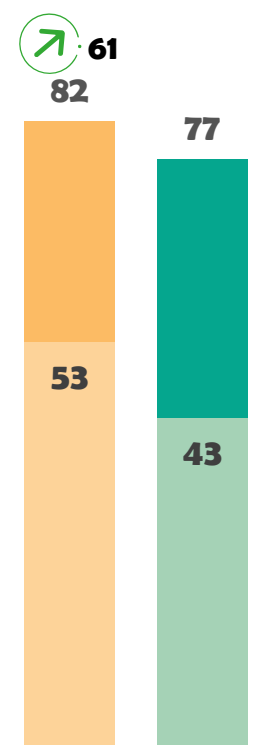
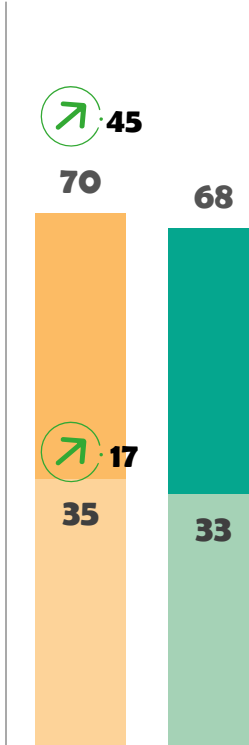
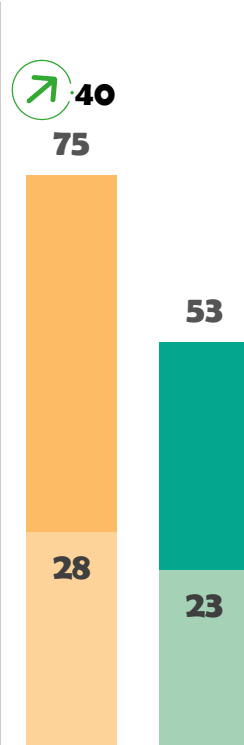
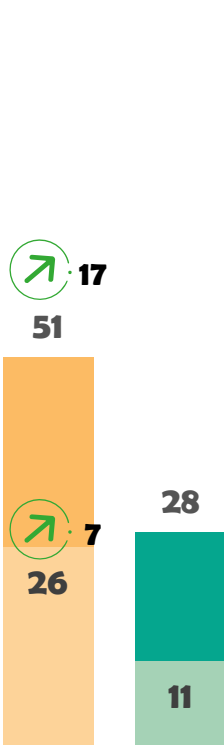
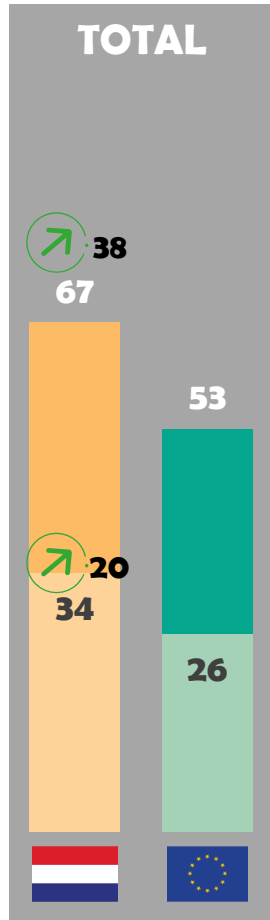
In %



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY USING



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

RIDE SHARING IMPLEMENTATION

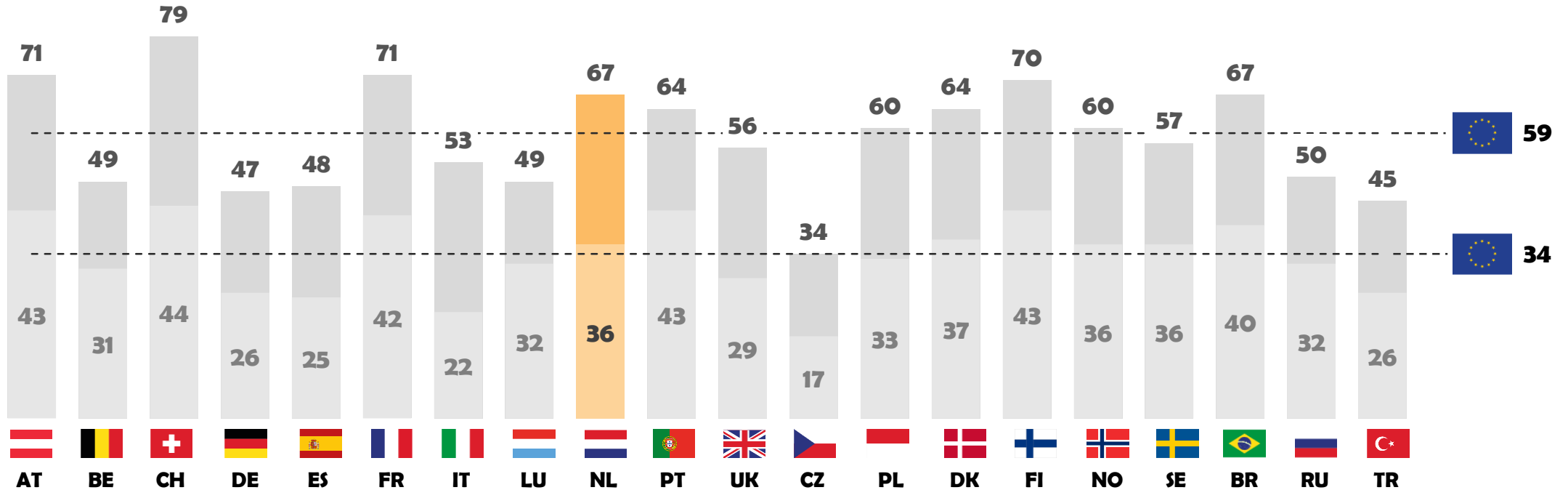
In %



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY USING



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

RIDE SHARING IMPLEMENTATION

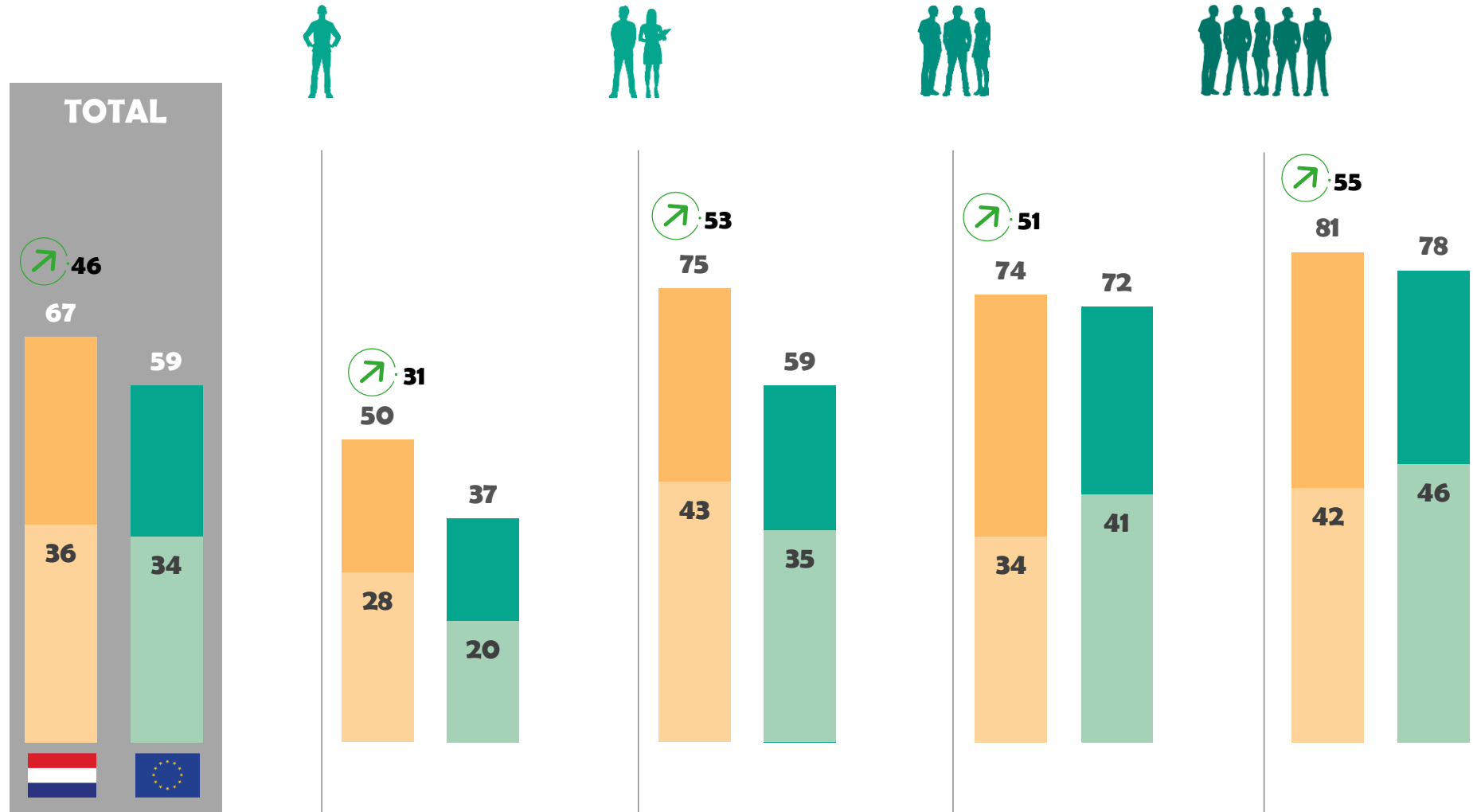
In %



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY USING



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

BIKE (OR OTHER TWO WHEELS) SHARING / LEASING IMPLEMENTATION*

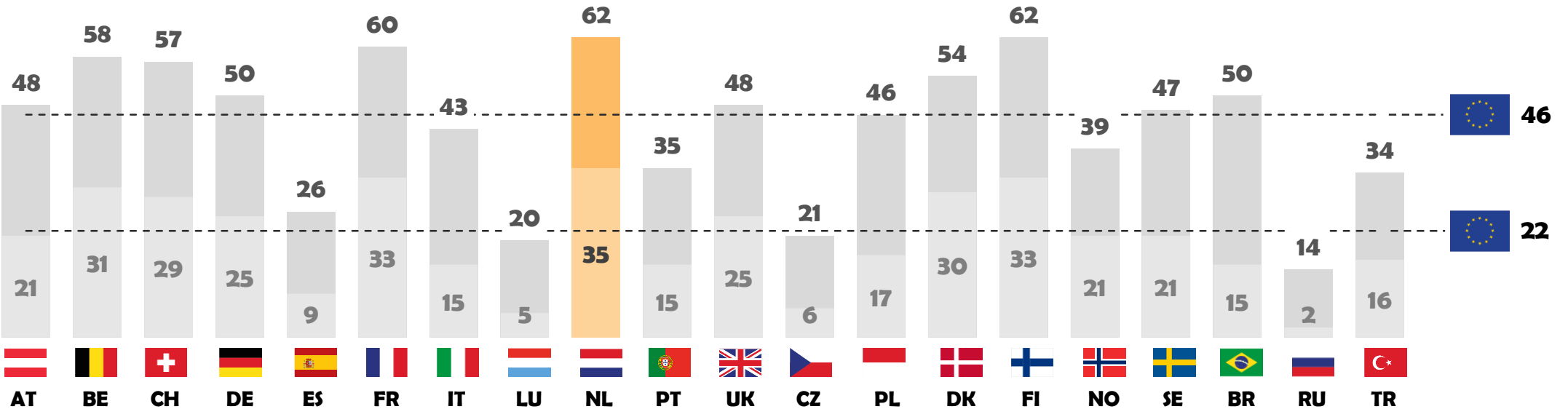
In %



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY USING



*This item has changed, no comparison vs previous year

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
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BIKE (OR OTHER TWO WHEELS) SHARING / LEASING IMPLEMENTATION*

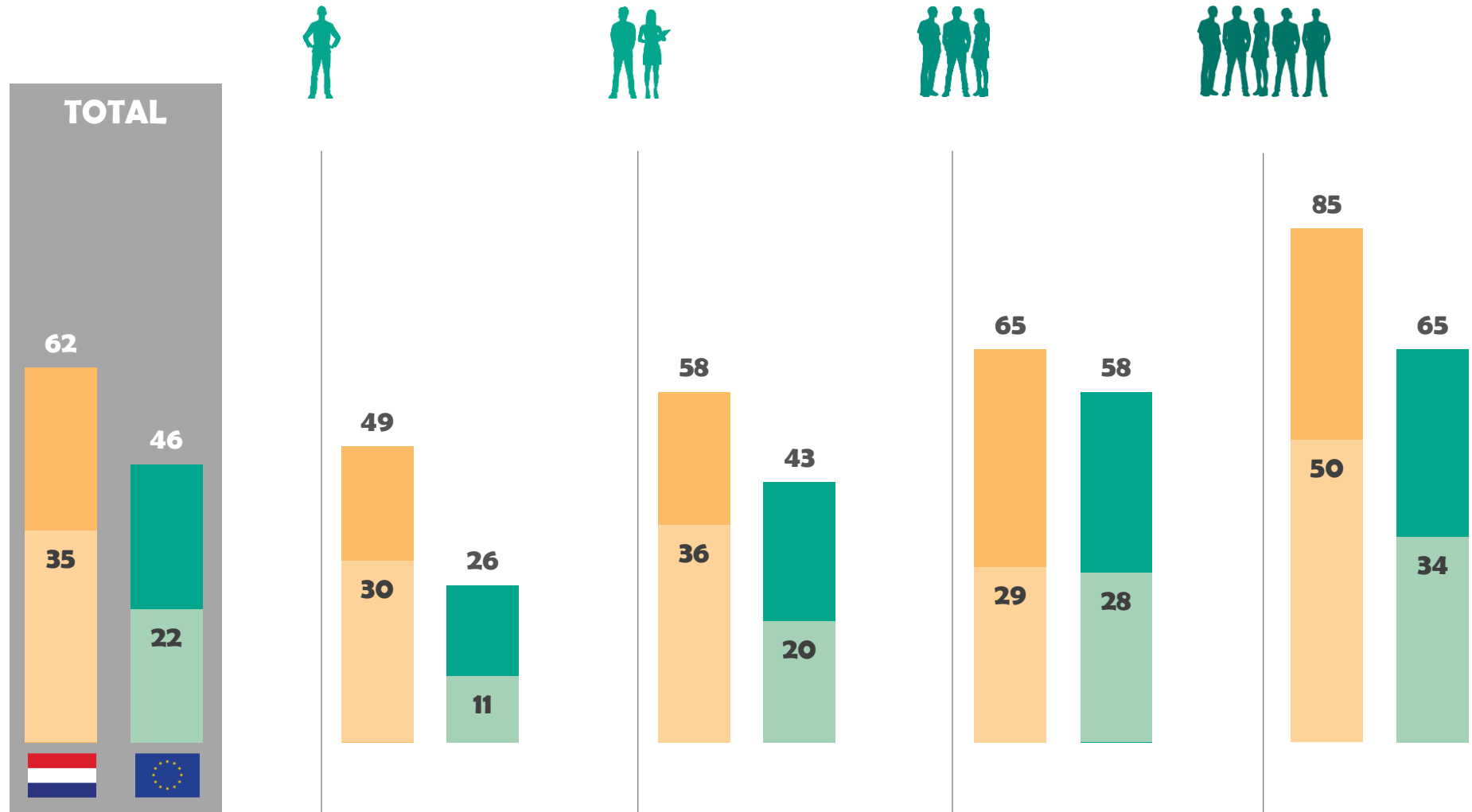
In %



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY USING



**This item has changed, no comparison vs previous year*

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%

PUBLIC TRANSPORT IMPLEMENTATION

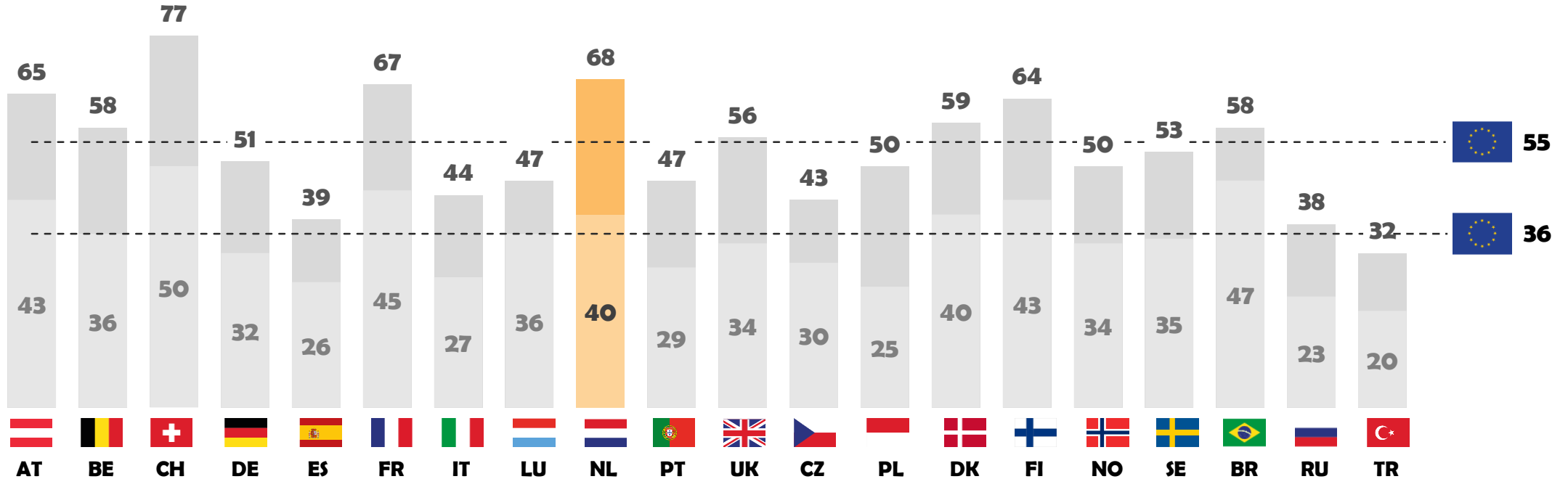
In %



**ALREADY
IMPLEMENTED OR
CONSIDER NEXT 3
YEARS**



**ALREADY
USING**



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

PUBLIC TRANSPORT IMPLEMENTATION

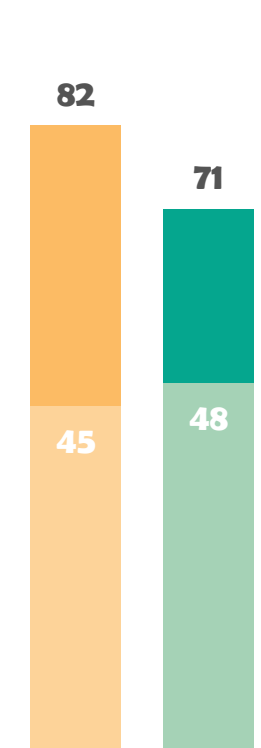
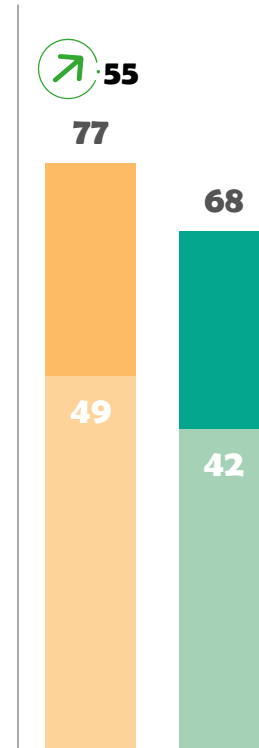
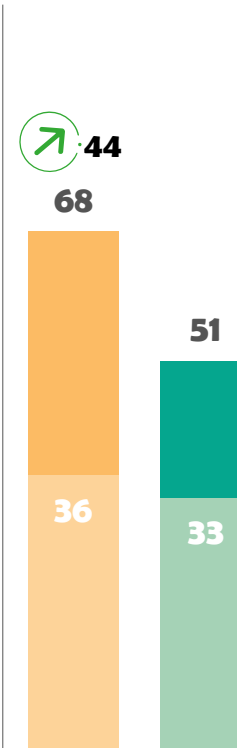
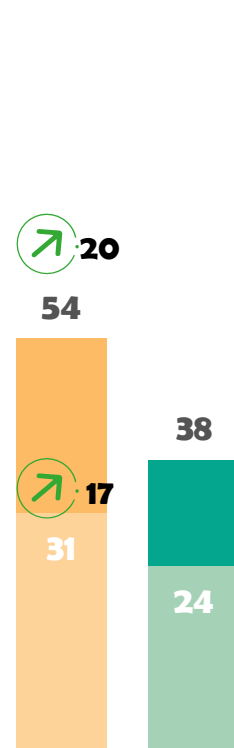
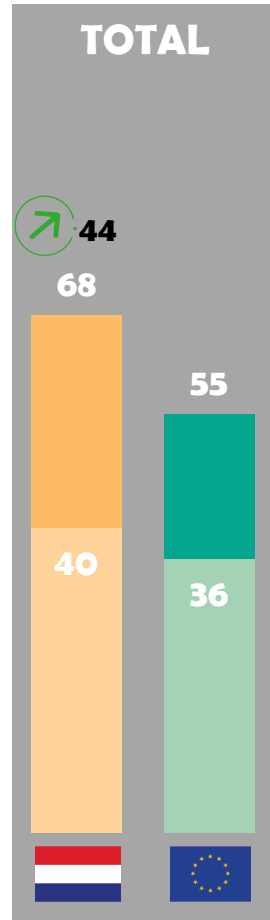
In %



**ALREADY
IMPLEMENTED OR
CONSIDER NEXT 3
YEARS**



**ALREADY
USING**



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

MOBILITY BUDGET IMPLEMENTATION

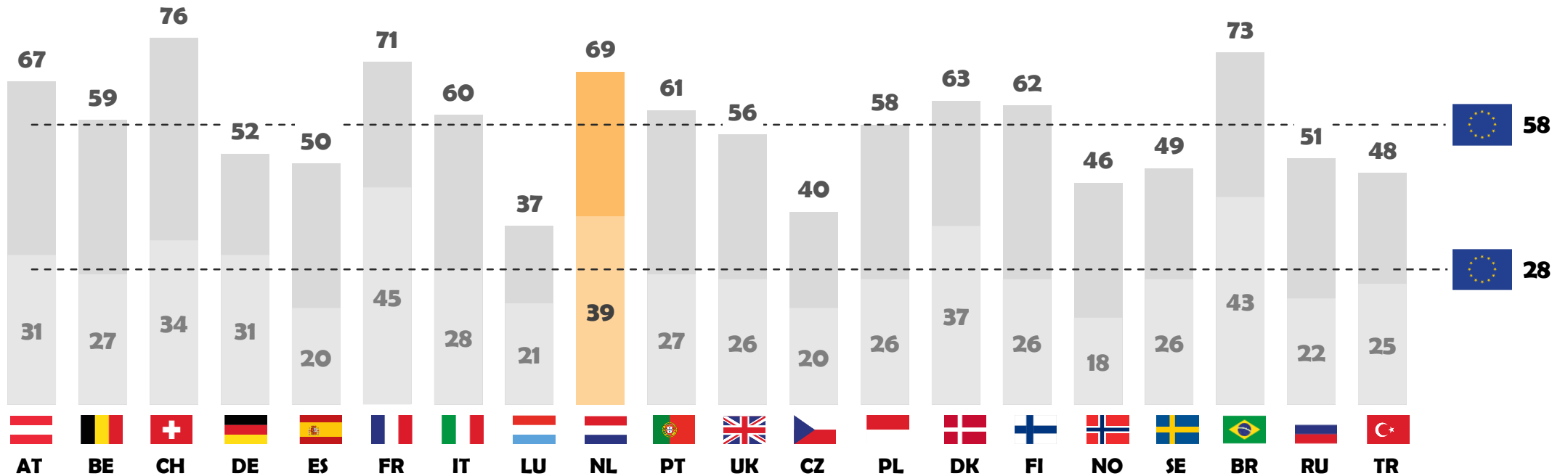
In %



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY USING



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

MOBILITY BUDGET IMPLEMENTATION

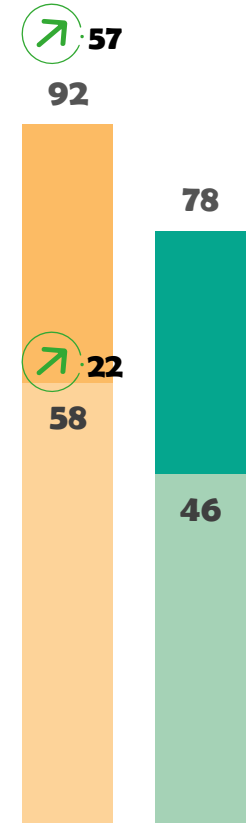
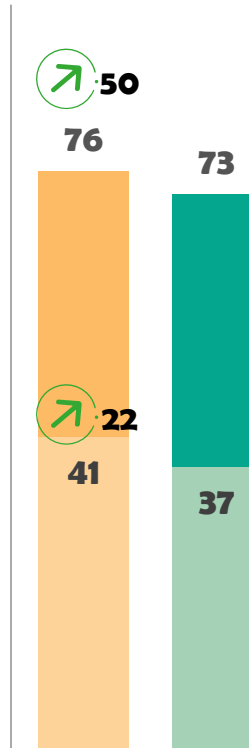
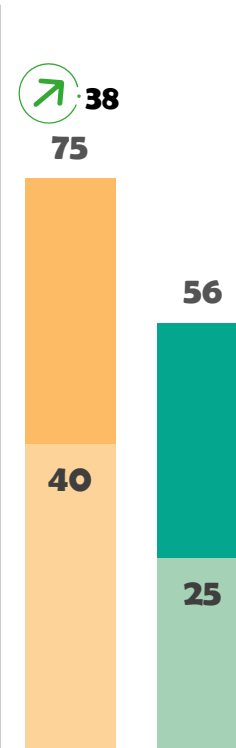
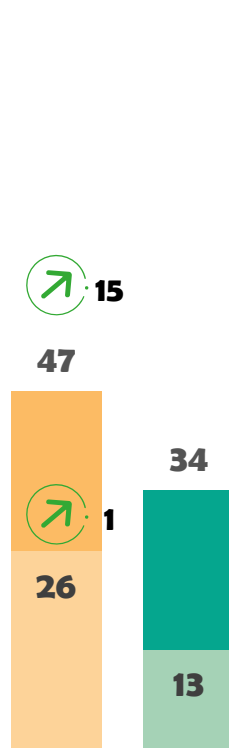
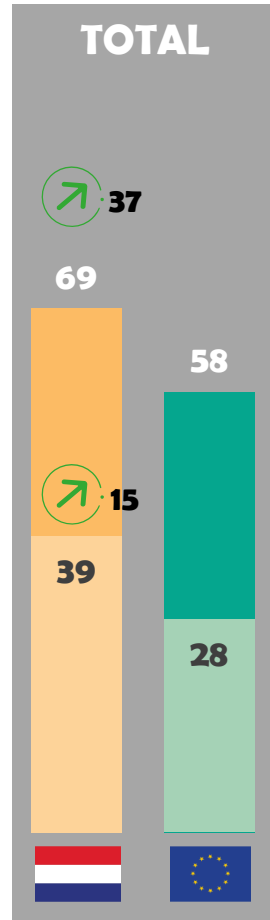
In %



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY USING



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

INTEREST IN OFFERING THEIR EMPLOYEES A MOBILITY BUDGET

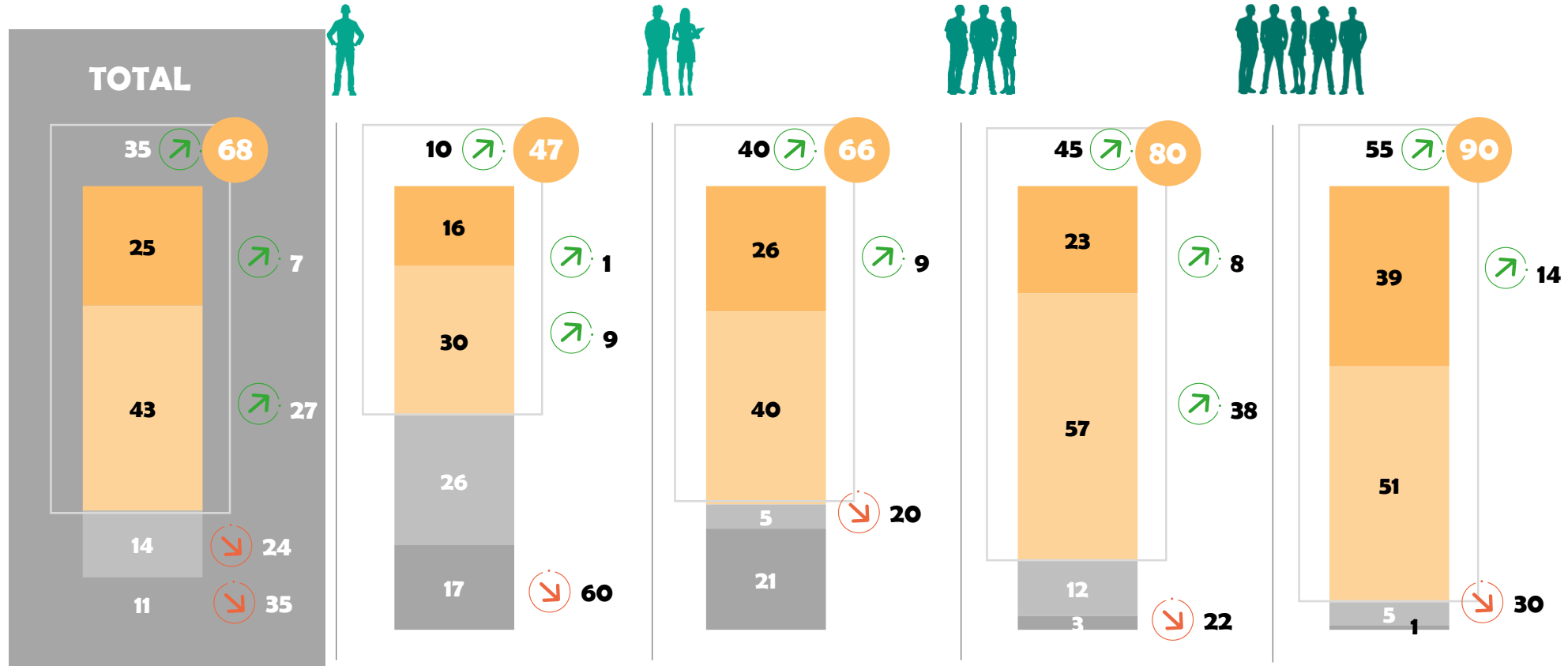
In %



Passenger cars + LCVs

TOTAL YES

- Yes, certainly ■
- Yes, probably ■
- No, probably not ■
- No, certainly not ■



Would you be interested in offering your employees a Mobility budget that can be used at their own insight?
 Basis: Companies with corporate vehicles = 100%

REASONS TO OFFER A MOBILITY BUDGET

In %



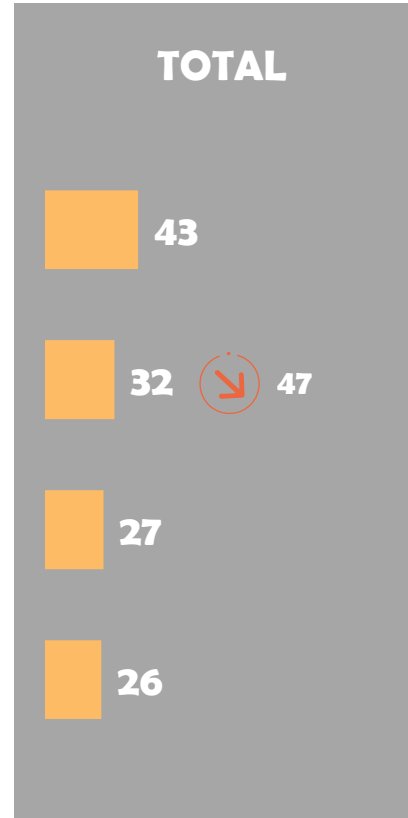
Passenger cars + LCVs

You support your employees in their wish for more options and flexibility in relation to mobility

It fits your views on doing business in sustainable and responsible way

Higher productivity as a result of different use of time

It brings lower cost of mobility



*Why do you offer or plan to offer a mobility budget?
Basis: 5T Already using or consider a Mobility Budget within a predefined budget*

AN APP TO BOOK MOBILITY SOLUTIONS IMPLEMENTATION*

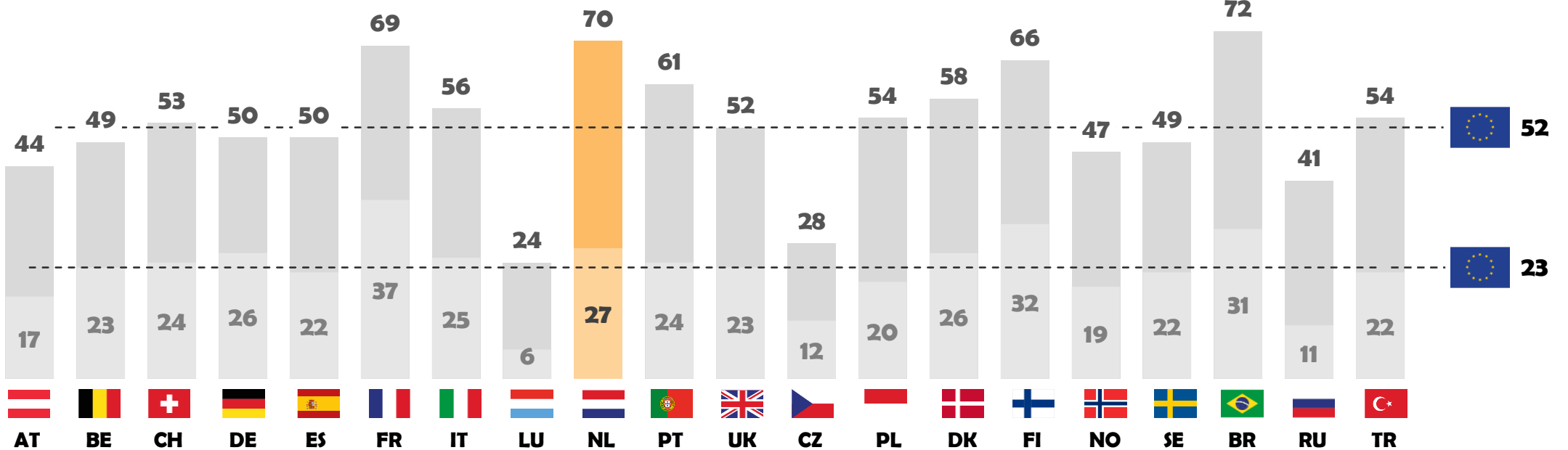
In %



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY USING



**This item has changed, no comparison vs previous year*

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%

AN APP TO BOOK MOBILITY SOLUTIONS IMPLEMENTATION*

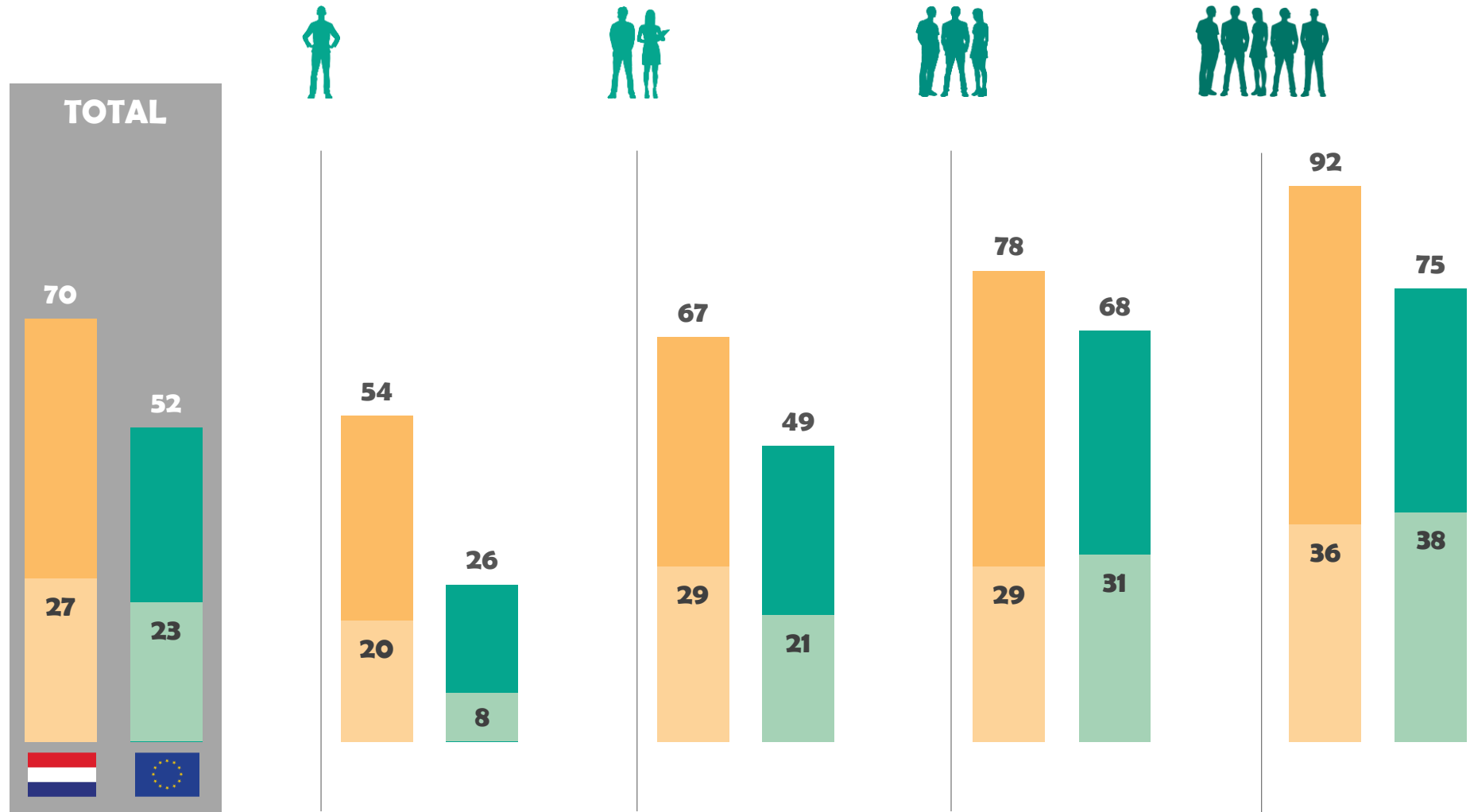
In %



**ALREADY
IMPLEMENTED OR
CONSIDER NEXT 3
YEARS**



**ALREADY
USING**



**This item has changed, no comparison vs previous year
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%*

PRIVATE LEASE OR SALARY SACRIFICE IMPLEMENTATION

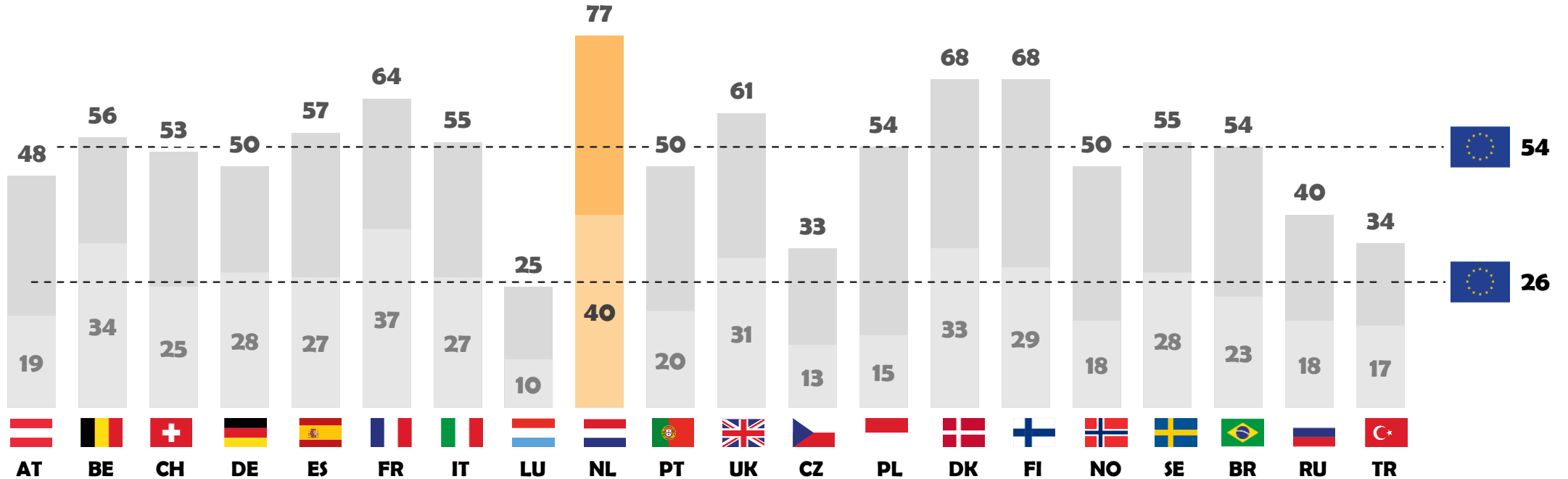
In %



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY USING



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

PRIVATE LEASE OR SALARY SACRIFICE IMPLEMENTATION

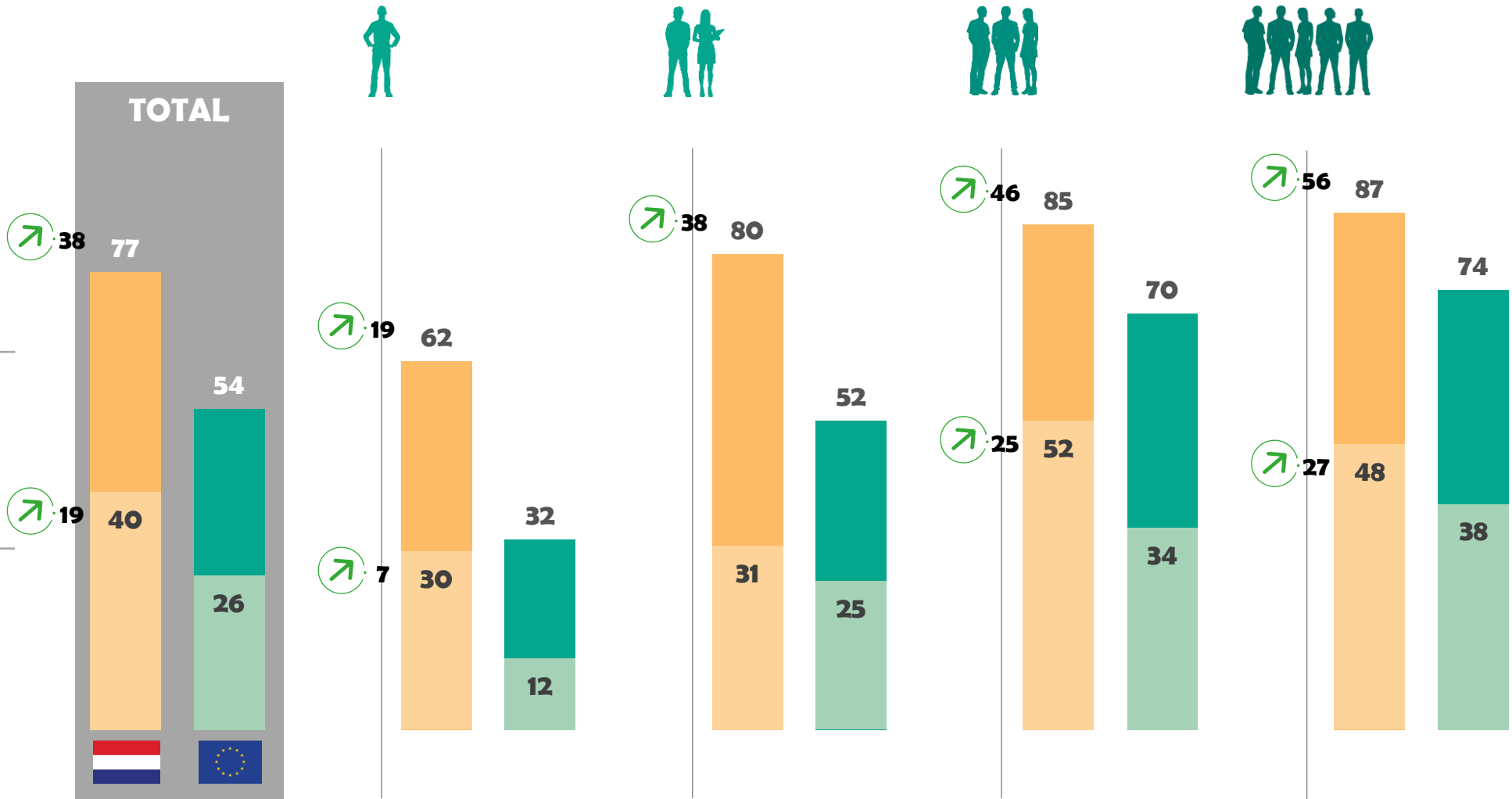
In %



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY USING



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

SHORT OR MID-TERM RENTAL VEHICLES IMPLEMENTATION*

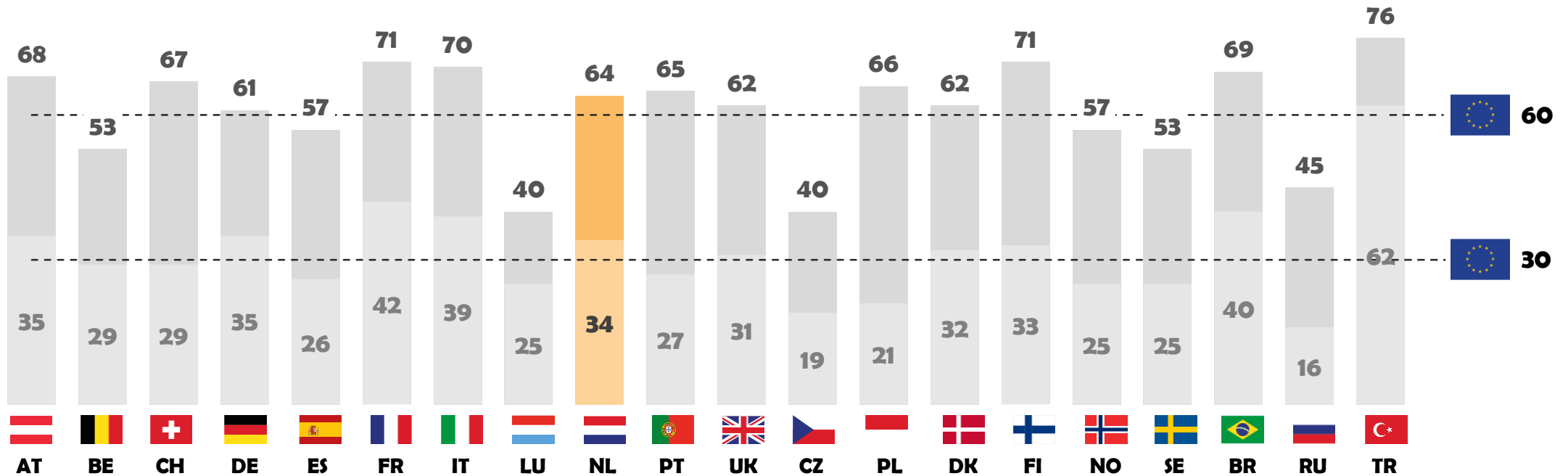
In %



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY USING



*This item has changed, no comparison vs previous year

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%

SHORT OR MID-TERM RENTAL VEHICLES IMPLEMENTATION*

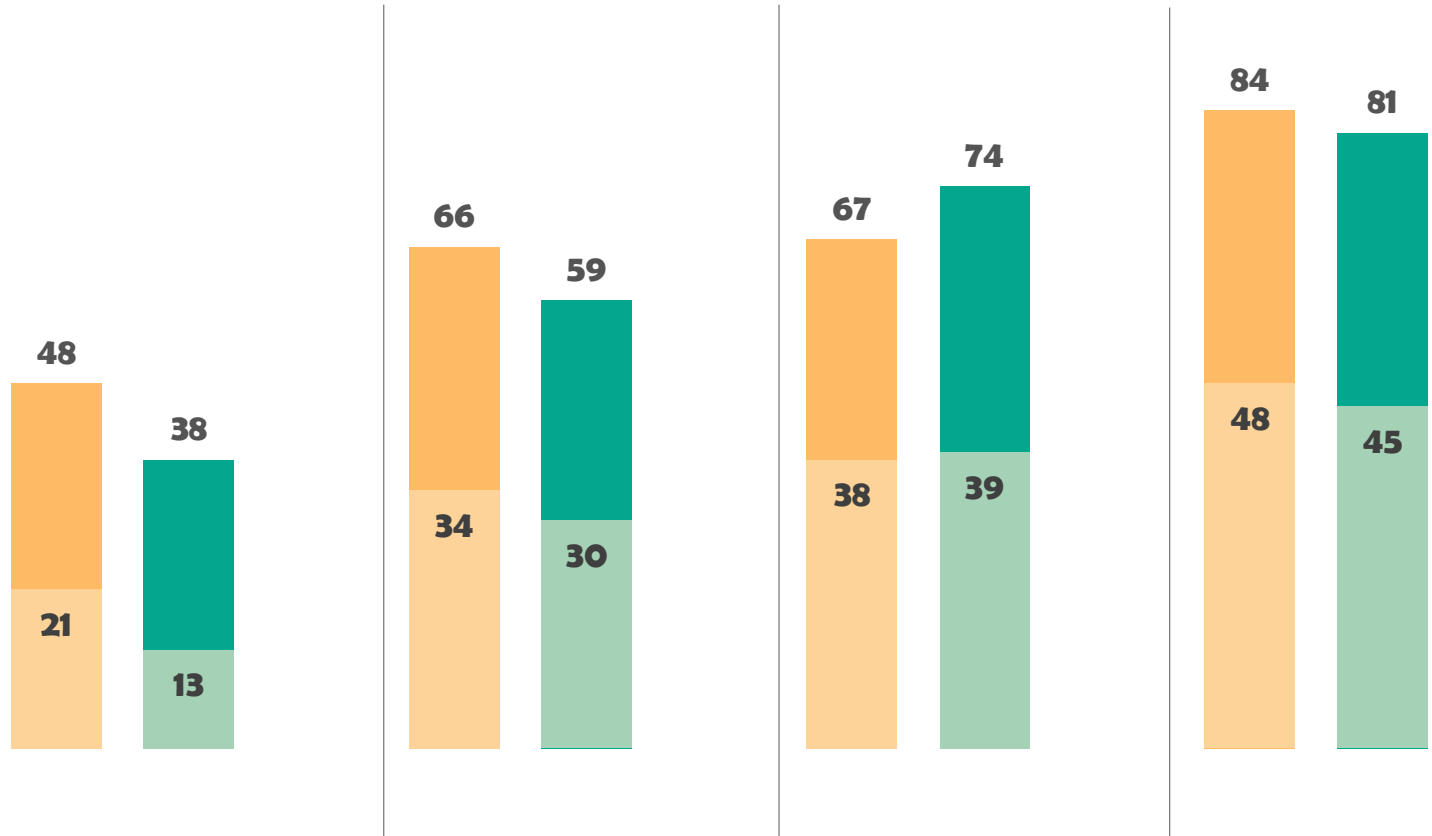
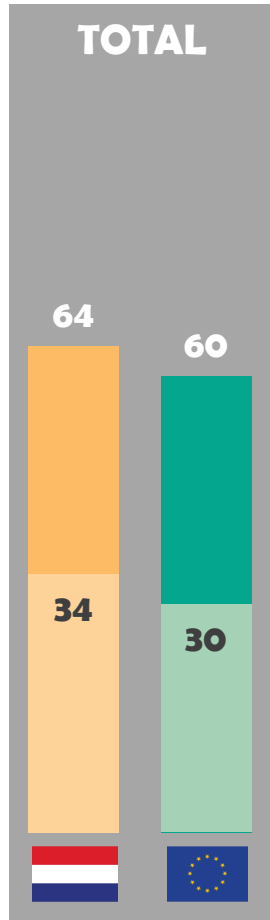
In %



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY USING



**This item has changed, no comparison vs previous year
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%*

HAVE A SPECIFIC STRATEGY ON THE MOBILITY CO2 FOOTPRINT

In %

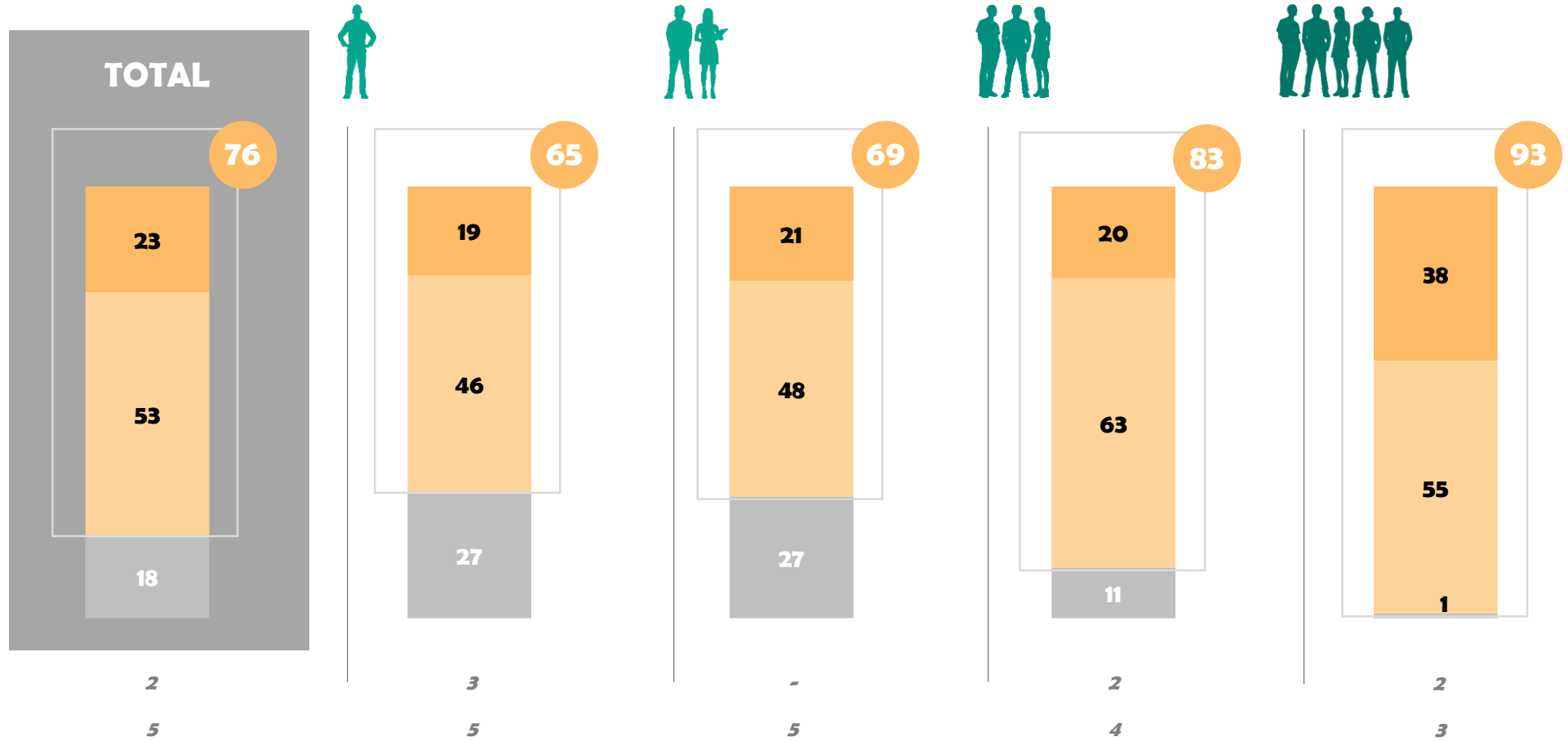


Passenger cars + LCVs

TOTAL Already in place or consider

- Already in place ■
- Considered ■
- Not considered ■

Don't know what it is
Don't know



No significant evolution

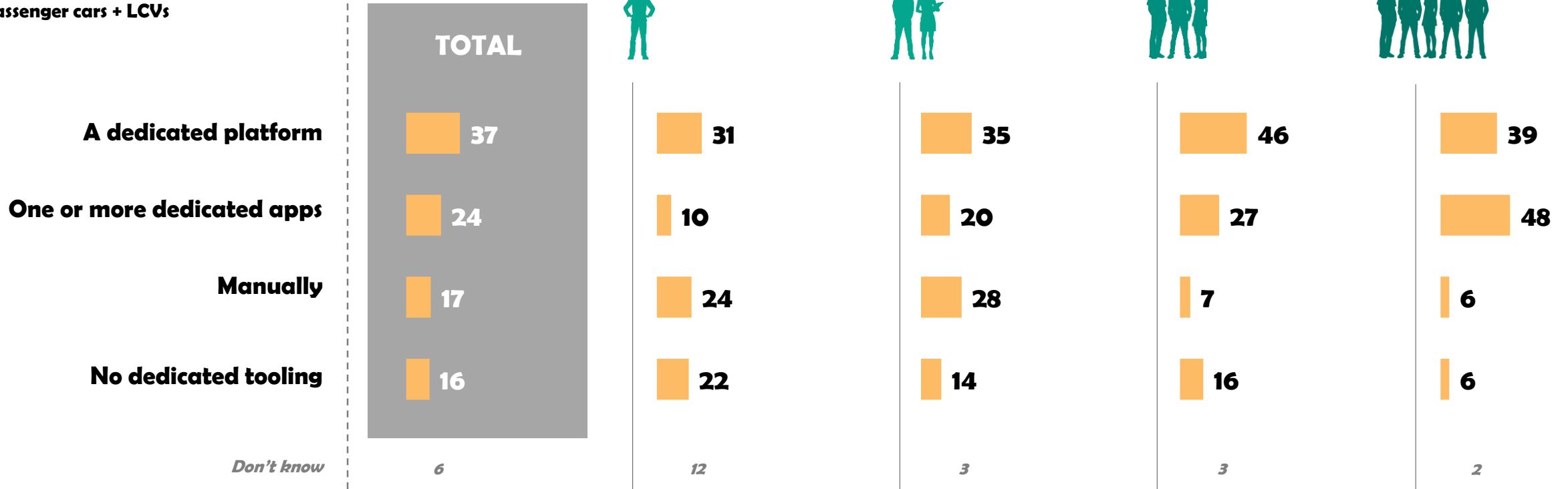
*Does your company have a specific strategy on the mobility CO2 footprint?
Basis: Companies with corporate vehicles = 100%*

TOOLS TO FACILITATE THE USE OF ALTERNATIVE MOBILITY SOLUTIONS

In %



Passenger cars + LCVs

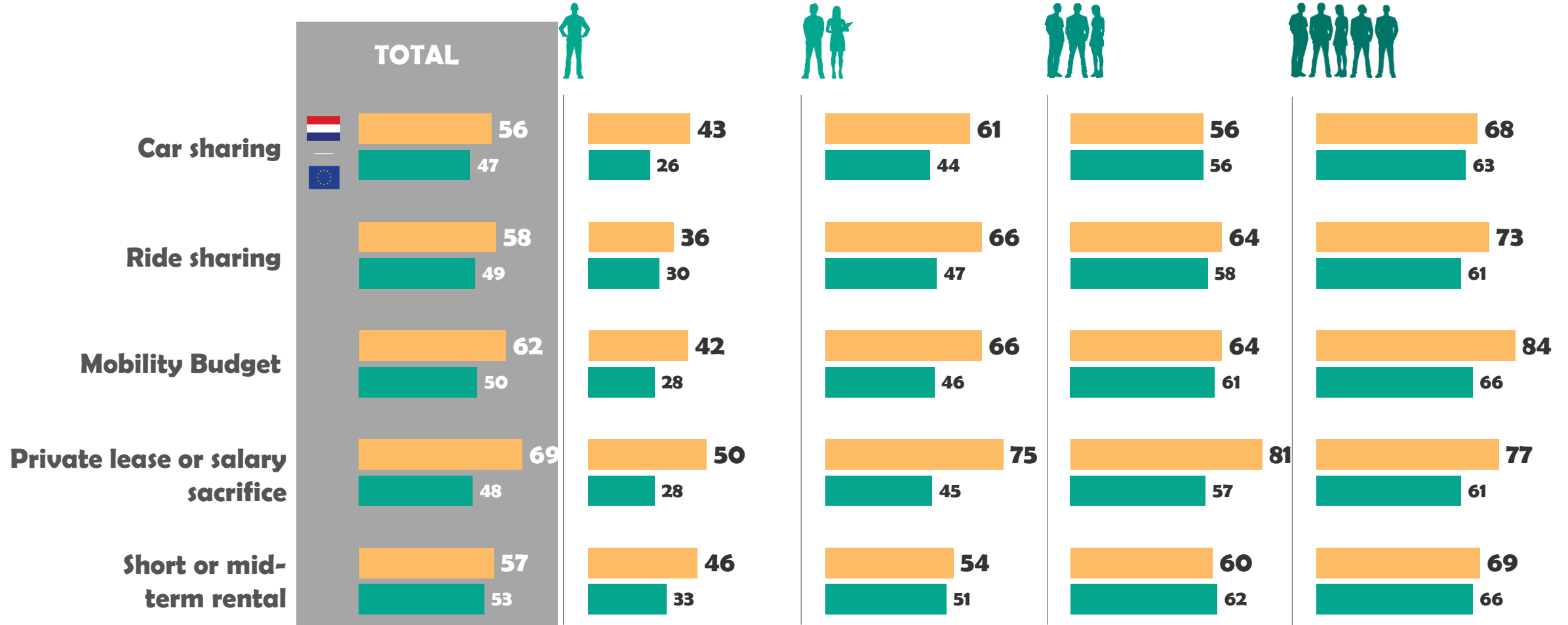


How do you plan to facilitate the use of these modes of transportation?
Basis: Companies with corporate vehicles = 100%

MOBILITY SOLUTIONS CONSIDERED BY DRIVERS TO COMPLEMENT THEIR COMPANY VEHICLES

TOTAL Certainly or probably

In %



New question 2021

Would you anticipate that your company car drivers would exchange all or part of their company car benefit for such alternatives?

Basis: companies using or considering alternative mobility solutions

6

HOW ARE COMPANIES FINANCING THEIR FLEET?



INSIGHT 4: STRONG GROWTH PERSPECTIVES FOR OPERATING LEASING IN THE FUTURE.

1

- **An increasing interest for operating leasing is expected in the coming years, regardless the company size.**
Overall, 7 companies out of 10 expect to introduce or develop the use of operating leasing to finance their corporate fleet in the future:
 - **Among companies from 500 employees and more, 8 out of 10 have the intention to introduce or develop it in the future.**
 - **Among companies from 10 to 499 employees, they are 70% on average.**
 - **Among very small companies (less than 10 employees), they are 6 out of 10.**

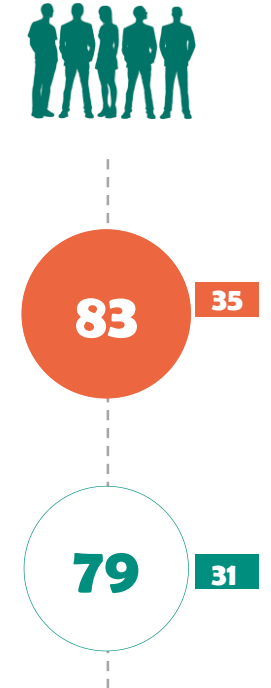
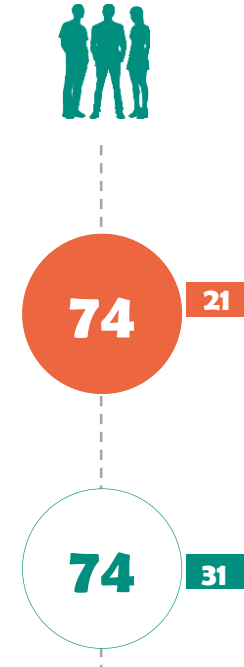
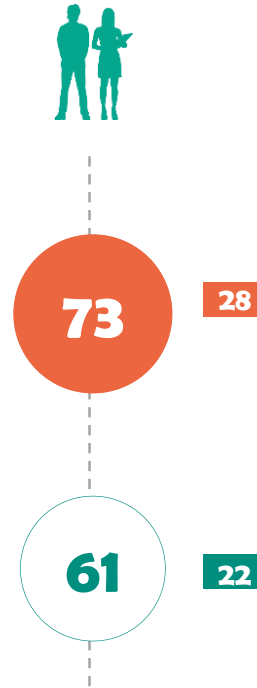
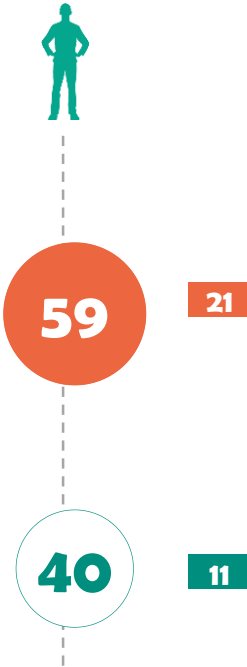
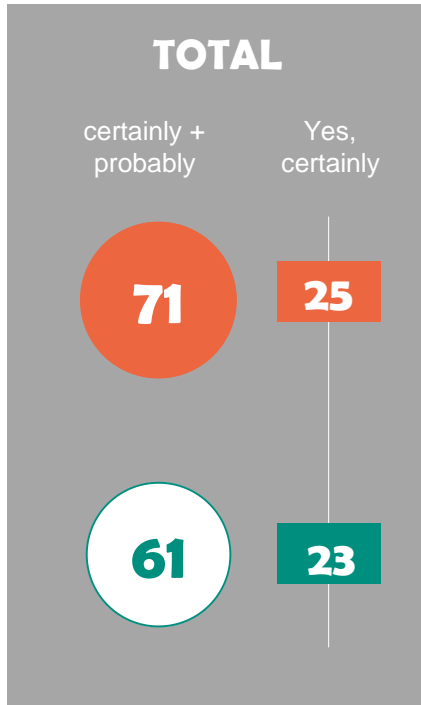
INTENTION TO DEVELOP OPERATING LEASING

Proportion of companies having the intention to develop operating leasing

In %



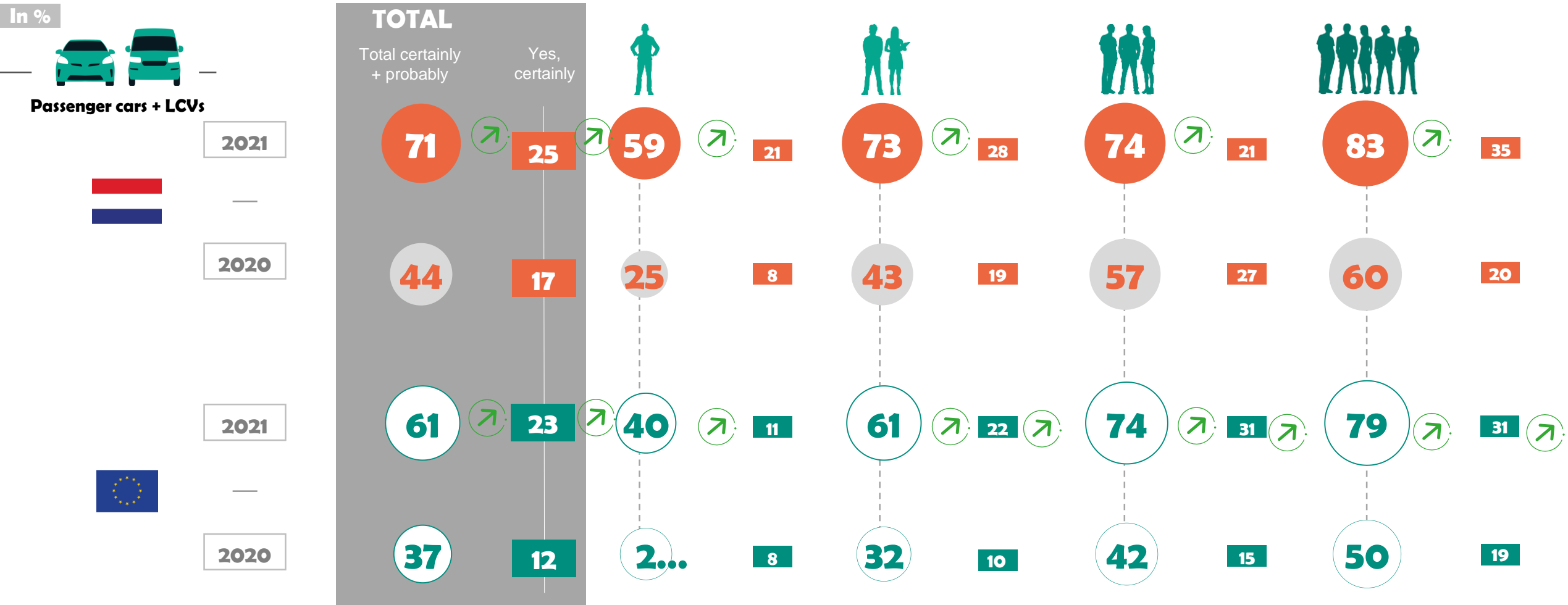
Passenger cars + LCVs



*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%*

EVOLUTION OF THE INTENTION TO DEVELOP OPERATING LEASING

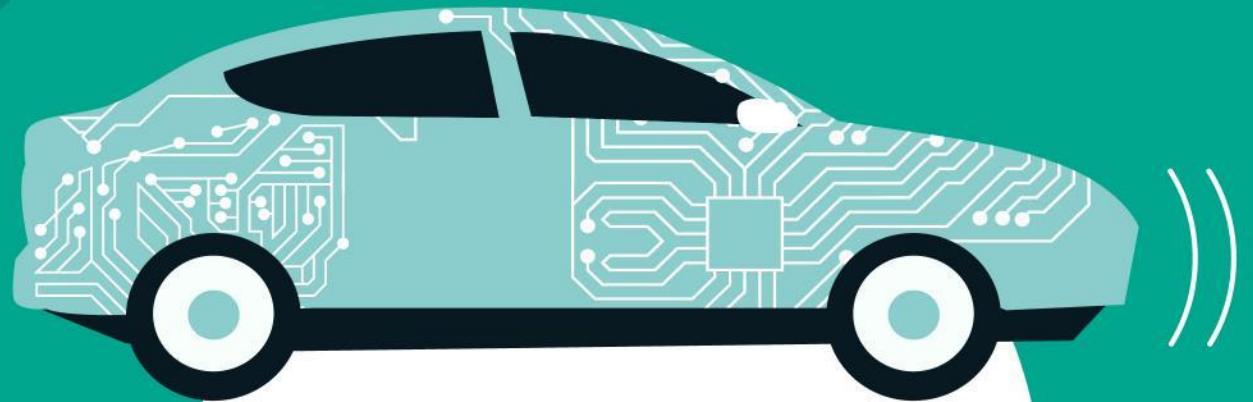
Proportion of companies having the intention to develop operational leasing



*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%*

7

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



INSIGHT 5: A NEED OF FURTHER CONTROL AND SAFETY THAT IMPACTS CONNECTED VEHICLES' USAGE.

1

- **Connected vehicles are used by 7 companies out of 10.**

In detail:

- **6 companies with passenger cars out of 10 and half of companies with LCVs use them.**
- **Regarding company size:**
 - **Most of large companies (250 employees and more) use them (95%)**
 - **3 medium companies (100 to 249 employees) out of 4 use them**
 - **2 small companies (10 to 99 employees) out of 3 use them**
 - **Half of very small companies (less than 10 employees) use them**

2

- **Control and safety are the key levers of adoption, including the need to locate vehicles or improve vehicle security (50%) or avoid not allowed usage (48%), before cost reductions (38%), environmental considerations (35%) or operational efficiency (34%). These stakes come along with a growing consideration for a policy on the use of mobile phones in cars and further safer actions (ex: buying vehicles with native device relating to road safety on it or smartphone blocking).**

PROPORTION OF COMPANIES USING CONNECTED VEHICLES*

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

HOW TO READ THE RESULTS?

69% of companies with fleet use connected vehicles for all or part of their fleet.

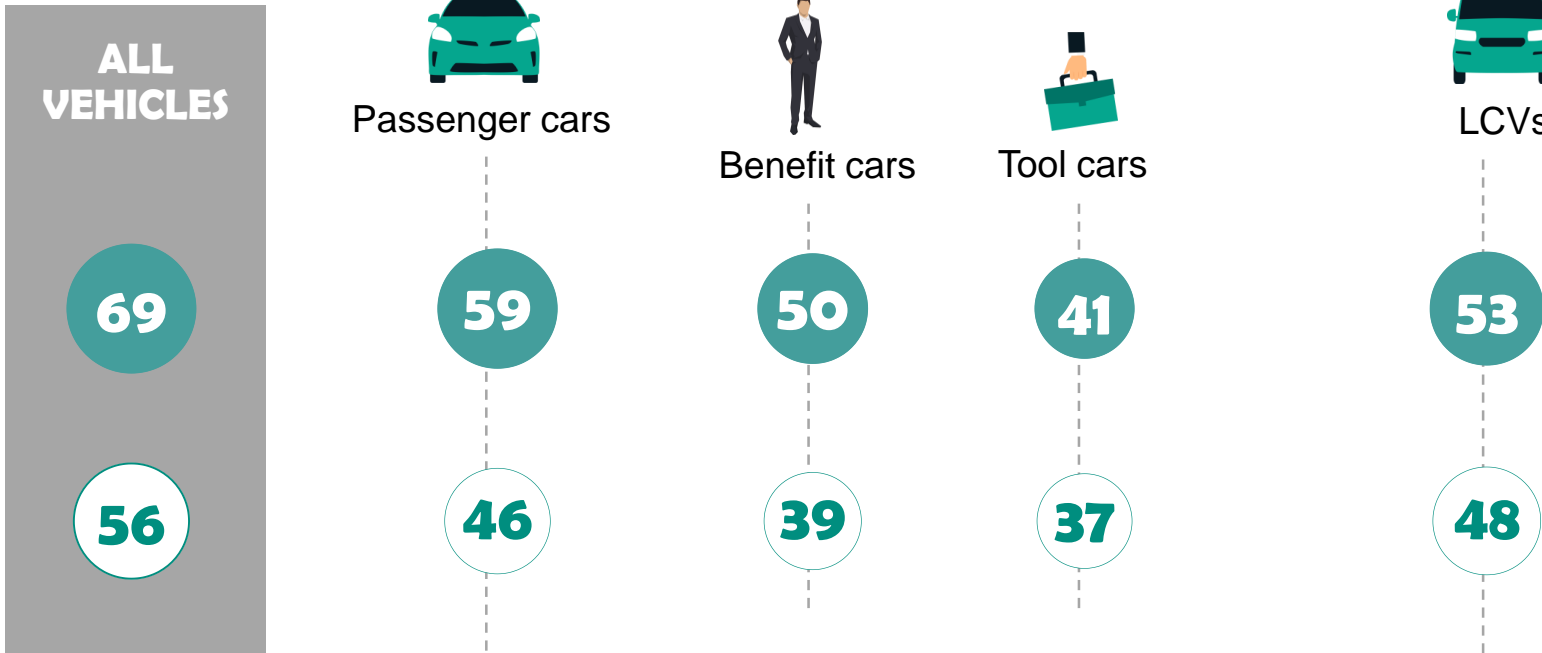
Among companies owning passenger cars, 59% use connected vehicles for passenger cars, 50% use connected vehicles for benefit cars, 41% for tool cars.

Among companies owning LCVs, 53% use connected vehicles for LCVs.

In %



Passenger cars + LCVs



**This question has changed, no comparison vs previous year*

Is your fleet connected thanks to a telematic tool?

Telematics enables transmission of data from a vehicle such as fuel consumption, driver behaviour and vehicle location.

Telematics do not include data transmission by the mean of the users' smartphones

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

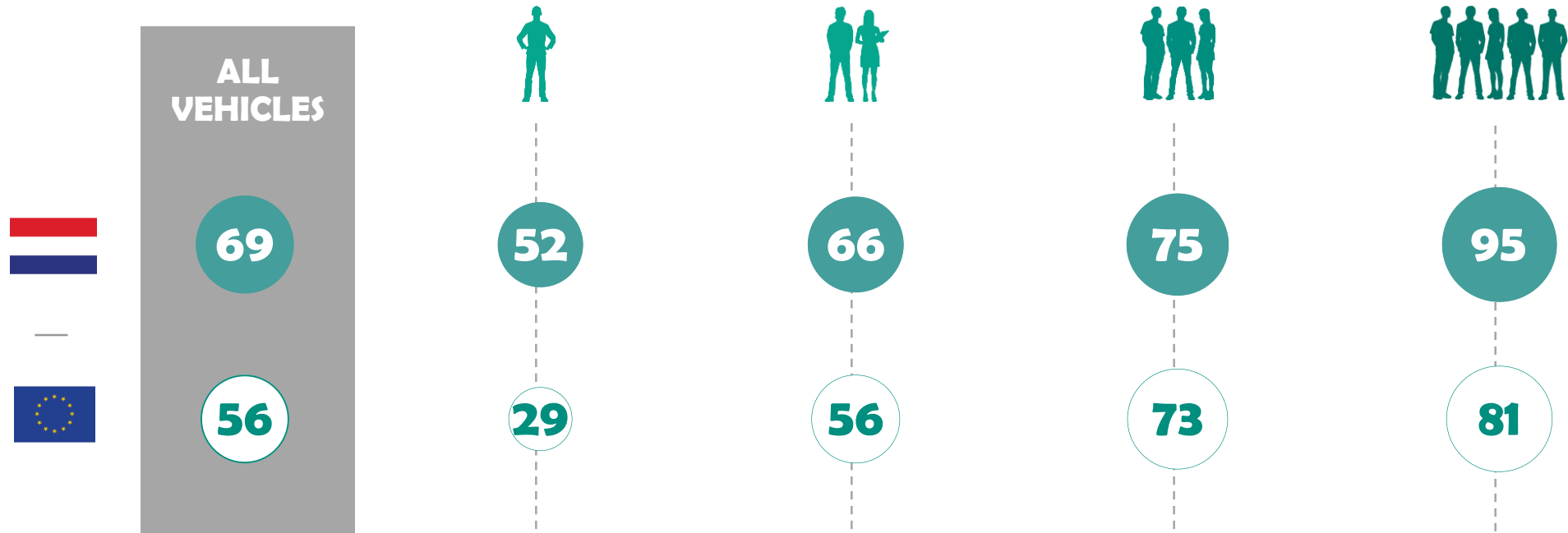
PROPORTION OF COMPANIES USING CONNECTED VEHICLES*

In %



Passenger cars + LCVs

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



**This question has changed, no comparison vs previous year*

Is your fleet connected thanks to a telematic tool?

Telematics enables transmission of data from a vehicle such as fuel consumption, driver behaviour and vehicle location.

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

REASONS FOR USING CONNECTED VEHICLES*

All vehicles

In %



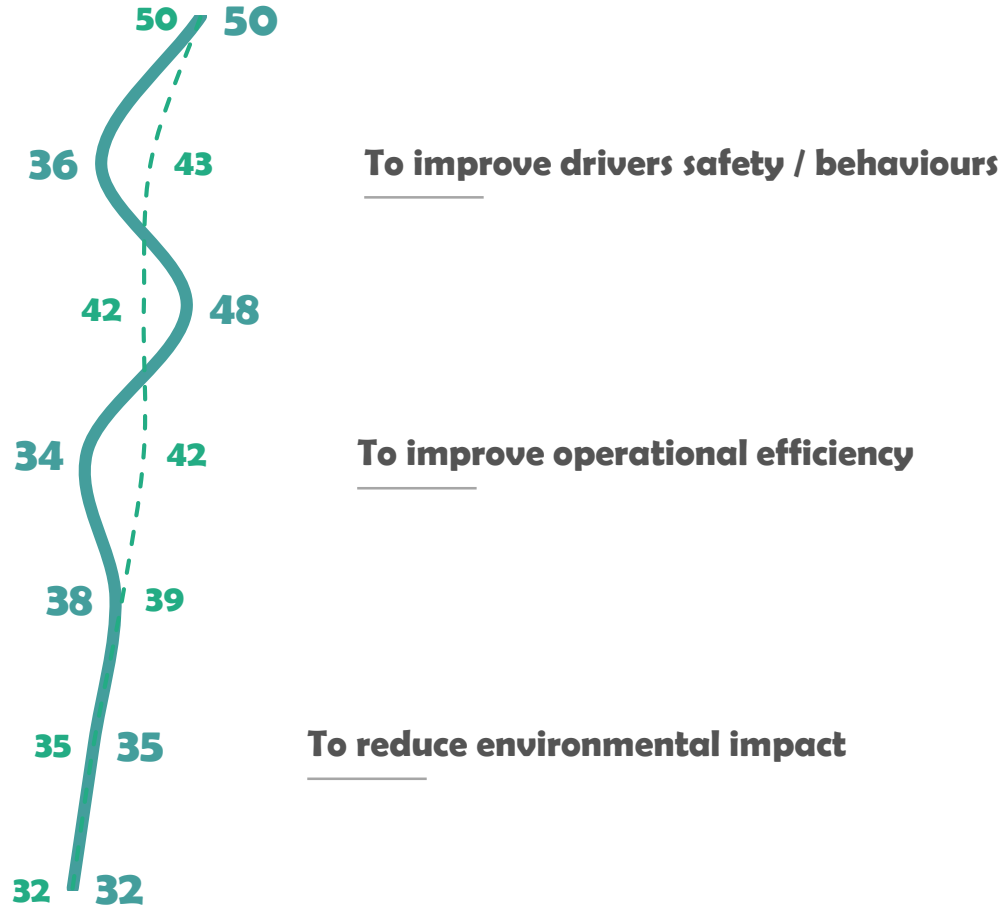
Passenger cars + LCVs

To locate vehicles or improve vehicle security

To avoid not allowed usage

To reduce fleet costs

To optimize car sharing



**This question has changed, no comparison vs previous year
What are the two main reasons why your fleet is connected by Telematics?
Basis: companies with connected vehicles thanks to Telematics*

CONSIDERATION FOR A POLICY ON THE USE OF MOBILE PHONES IN CARS

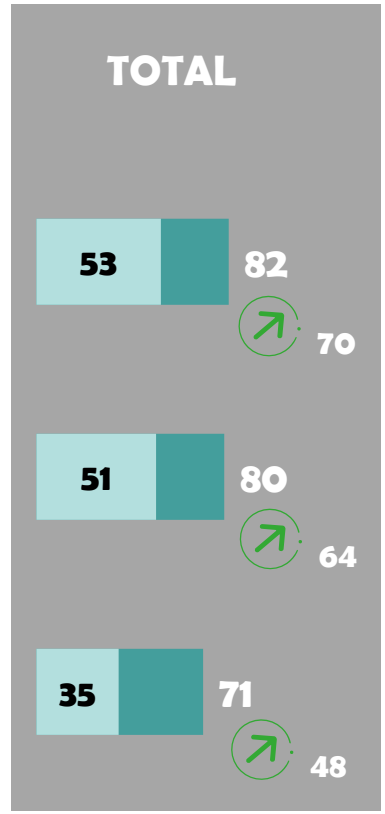
In %



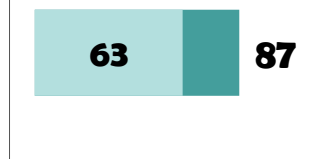
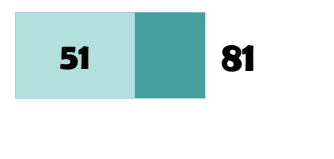
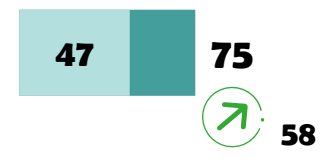
Passenger cars + LCVs

Already implemented

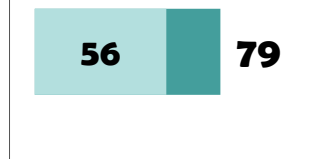
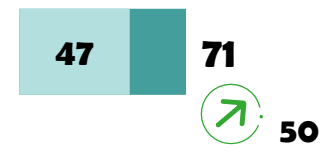
Total Already implemented or consider



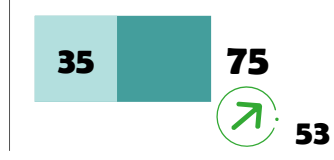
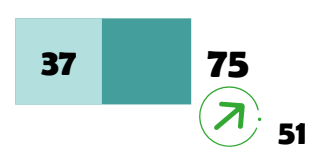
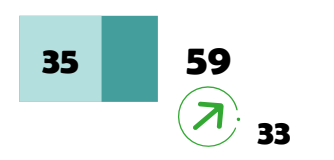
with regards to make or receive phone calls



with regards to the use of navigation apps



with regards to the use of apps except for navigation



*Do you consider to have a policy on the use of mobile phones in the car...
Basis: Companies with corporate vehicles = 100%*

ACTIONS SET UP TO INCREASE ROAD SAFETY

In %



Passenger cars + LCVs

Yes, already implemented

Total Already implemented or consider

Buying vehicles with native device relating to road safety on it

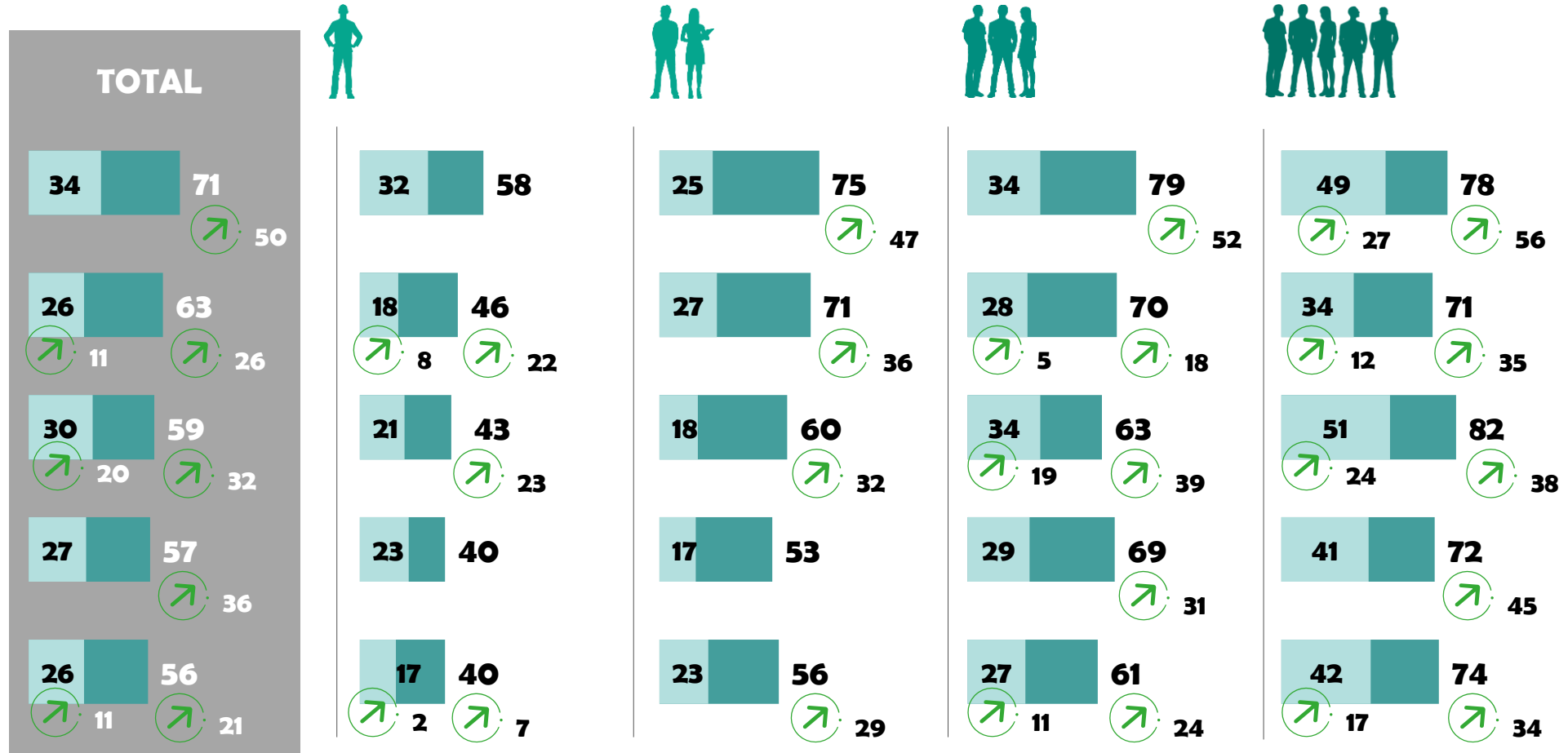
Smartphone blocking

Real world driving style analysis

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

E-learning

TOTAL

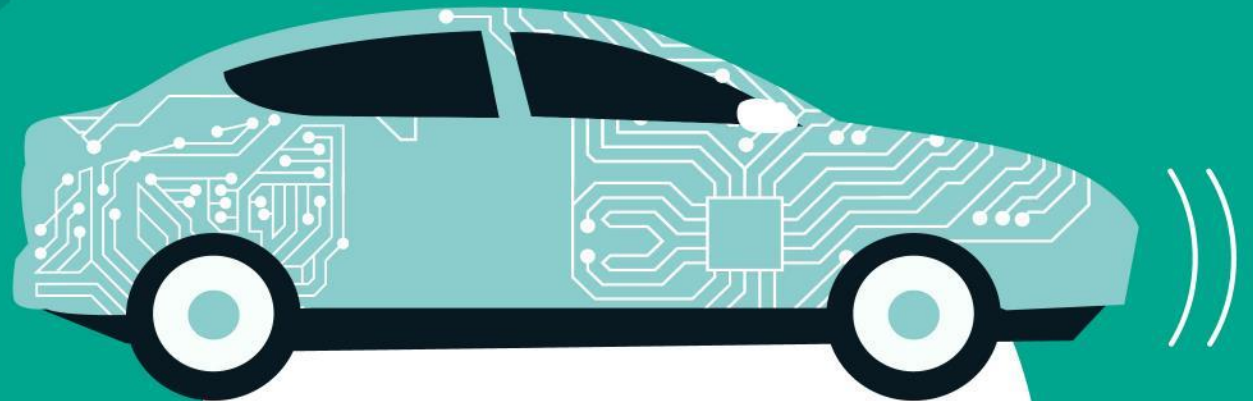


*In order to increase road safety, does your company set up the following actions?
Basis: Companies with corporate vehicles = 100%*

7

CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY

A. PASSENGER CARS



PROPORTION OF COMPANIES USING CONNECTED VEHICLES*

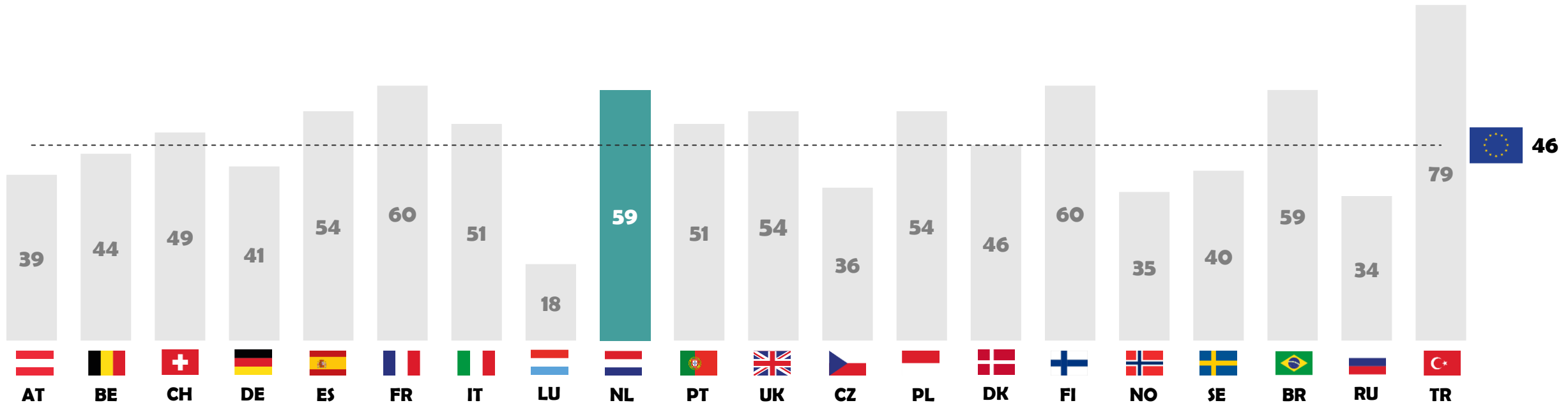
Passenger cars

In %



Passenger cars

PROPORTION OF COMPANIES HAVING IMPLEMENTED CONNECTED VEHICLES FOR THEIR PASSENGER CARS



**This question has changed, no comparison vs previous year*

Is your fleet connected thanks to a telematic tool?

Telematics enables transmission of data from a vehicle such as fuel consumption, driver behaviour and vehicle location.

Telematics do not include data transmission by the mean of the users' smartphones

Basis: companies with corporate passenger cars

PROPORTION OF COMPANIES USING CONNECTED VEHICLES*

Passenger cars

In %



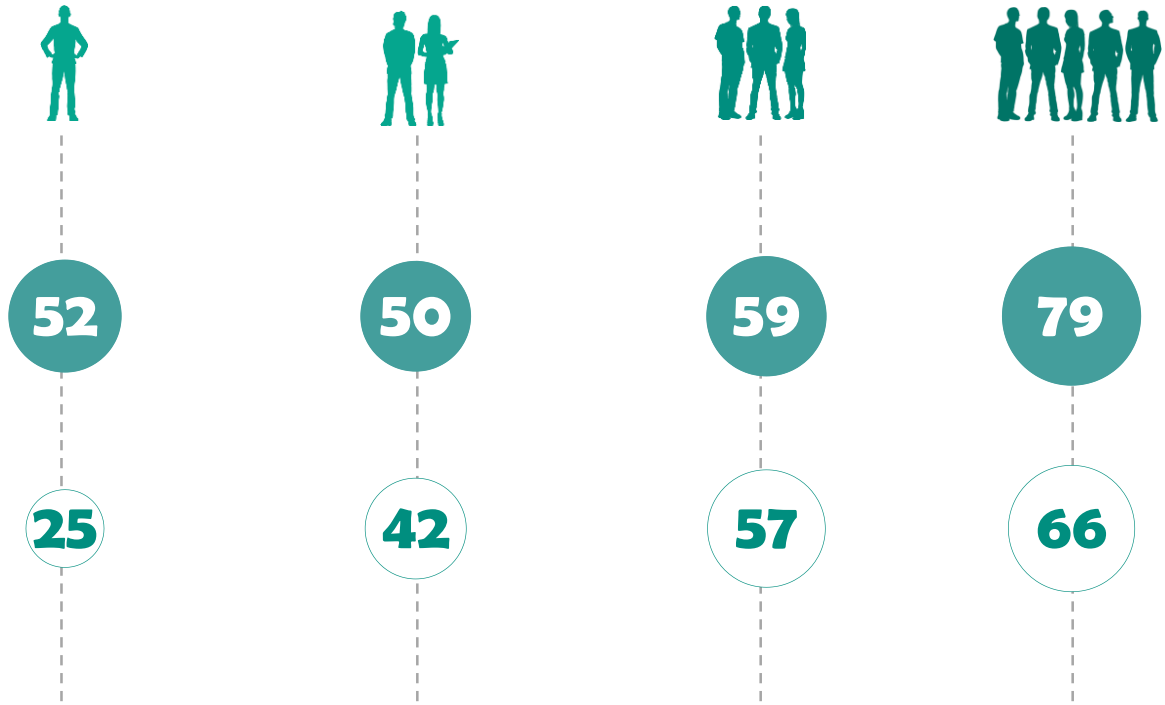
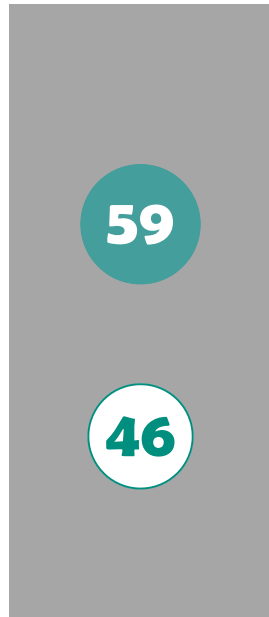
Passenger cars

HOW TO READ THE RESULTS?

Among companies owning passenger cars, 59% use connected vehicles.

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

Basis: companies with at least one passenger car in fleet



**This question has changed, no comparison vs previous year*

Is your fleet connected thanks to a telematic tool?

Telematics enables transmission of data from a vehicle such as fuel consumption, driver behaviour and vehicle location.

Telematics do not include data transmission by the mean of the users' smartphones

Basis: companies with corporate passenger cars

REASONS FOR USING CONNECTED VEHICLES*

Passenger cars

In %



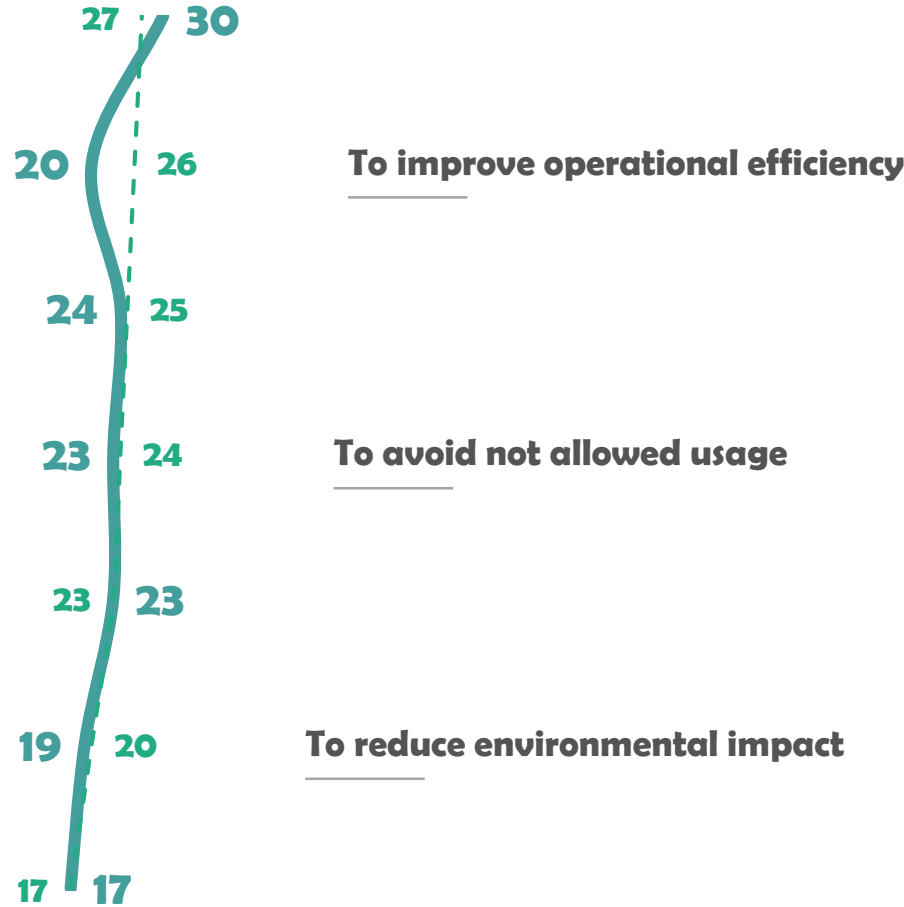
Passenger cars

To locate vehicles or improve vehicle security

To improve drivers safety / behaviours

To reduce fleet costs

To optimize car sharing



**This question has changed, no comparison vs previous year*

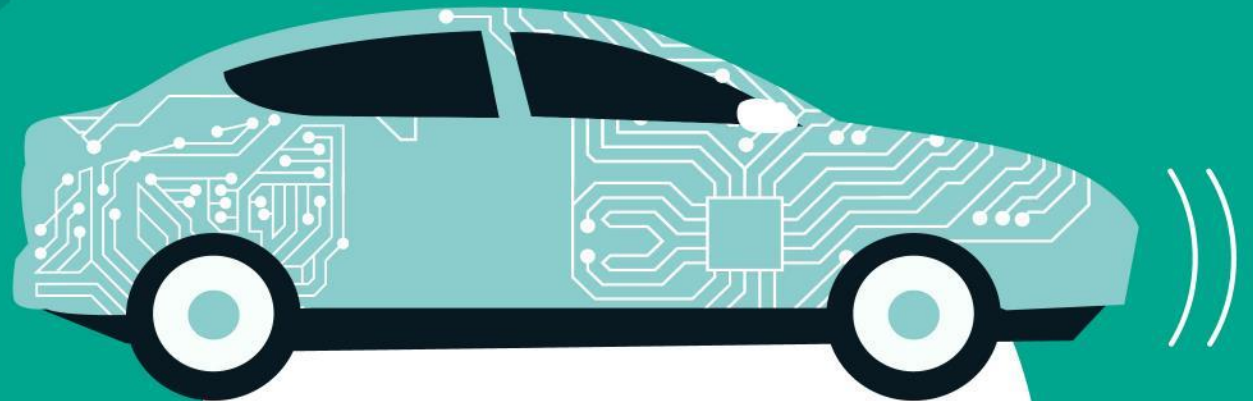
What are the two main reasons why your fleet is connected by Telematics?

Basis: companies with connected vehicles thanks to Telematics

7

CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY

B. BENEFIT CARS



PROPORTION OF COMPANIES USING CONNECTED VEHICLES*

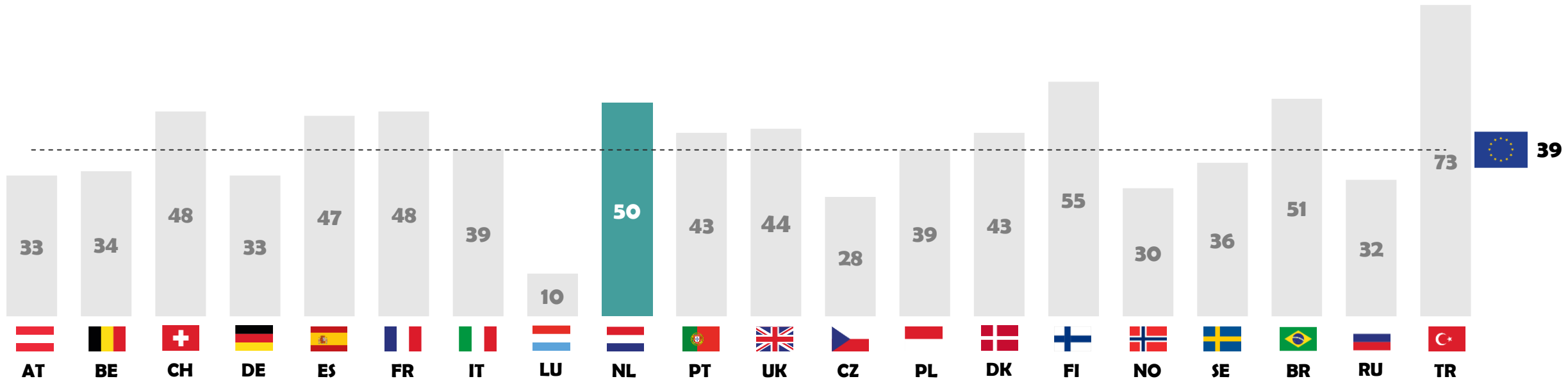
Benefit cars

In %



Benefit cars

PROPORTION OF COMPANIES HAVING IMPLEMENTED CONNECTED VEHICLES FOR THEIR BENEFIT CARS



**This question has changed, no comparison vs previous year*

Is your fleet connected thanks to a telematic tool?

Telematics enables transmission of data from a vehicle such as fuel consumption, driver behaviour and vehicle location.

Telematics do not include data transmission by the mean of the users' smartphones

Basis: companies with corporate benefit cars

PROPORTION OF COMPANIES USING CONNECTED VEHICLES*

Benefit cars

In %



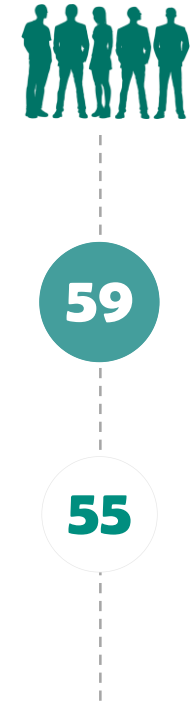
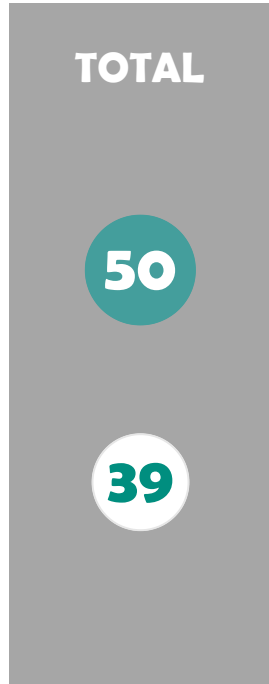
Benefit cars

HOW TO READ THE RESULTS?

Among companies owning passenger cars, 50% use connected vehicles for benefit cars.

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

Basis: companies with at least one passenger car in fleet



**This question has changed, no comparison vs previous year*

Is your fleet connected thanks to a telematic tool?

Telematics enables transmission of data from a vehicle such as fuel consumption, driver behaviour and vehicle location.

Telematics do not include data transmission by the mean of the users' smartphones

Basis: companies with corporate benefit cars

REASONS FOR USING CONNECTED VEHICLES*

Benefit cars

In %



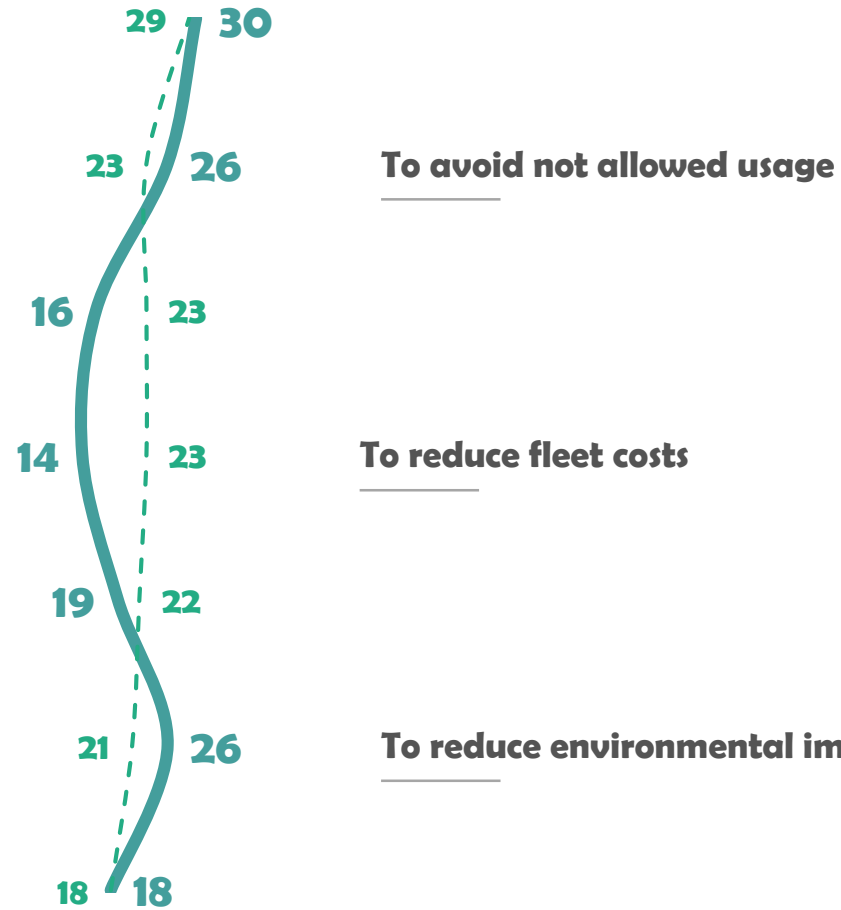
Benefit cars

To locate vehicles or improve vehicle security

To improve drivers safety / behaviours

To improve operational efficiency

To optimize car sharing



*This question has changed, no comparison vs previous year

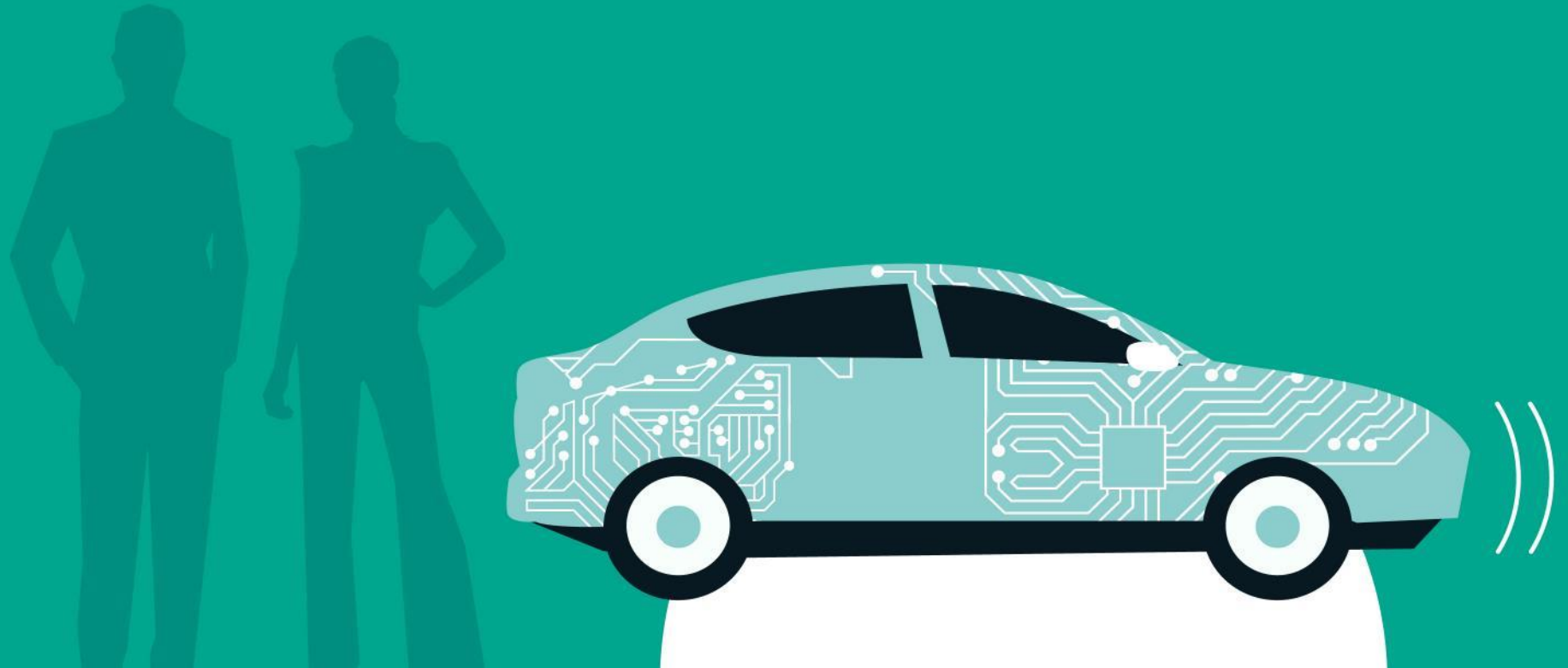
What are the two main reasons why your fleet is connected by Telematics?

Basis: companies with connected vehicles thanks to Telematics

7

CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY

C. TOOL CARS



PROPORTION OF COMPANIES USING CONNECTED VEHICLES*

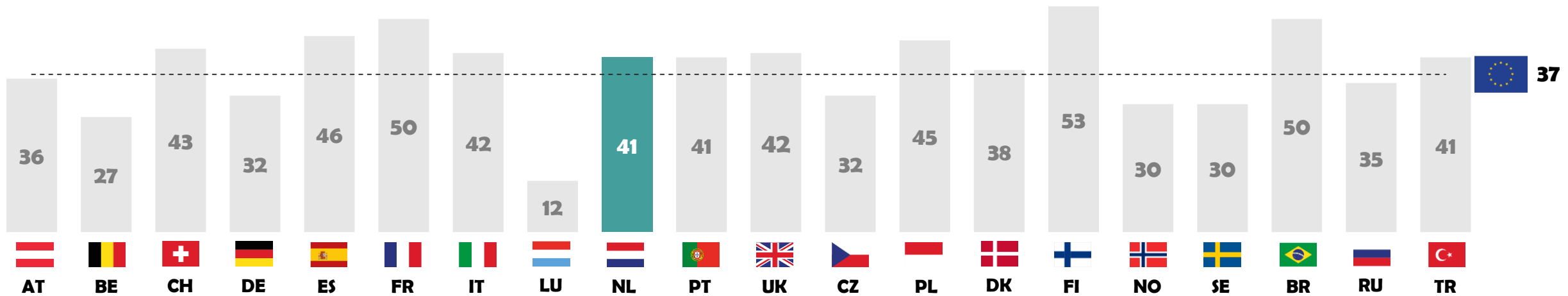
Tool cars

In %



Tool cars

PROPORTION OF COMPANIES HAVING IMPLEMENTED CONNECTED VEHICLES FOR THEIR TOOL CARS



**This question has changed, no comparison vs previous year*

Is your fleet connected thanks to a telematic tool?

Telematics enables transmission of data from a vehicle such as fuel consumption, driver behaviour and vehicle location.

Telematics do not include data transmission by the mean of the users' smartphones

Basis: companies with corporate tool cars

PROPORTION OF COMPANIES USING CONNECTED VEHICLES*

Tool cars

In %



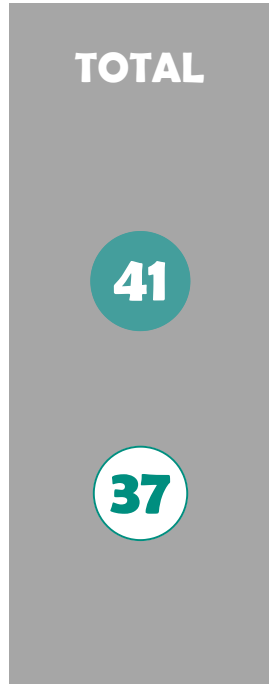
Tool cars

HOW TO READ THE RESULTS?

Among companies owning passenger cars, 41% use connected vehicles for tool cars

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

Basis: companies with at least one passenger car in fleet



**This question has changed, no comparison vs previous year*

Is your fleet connected thanks to a telematic tool?

Telematics enables transmission of data from a vehicle such as fuel consumption, driver behaviour and vehicle location.

Telematics do not include data transmission by the mean of the users' smartphones

Basis: companies with corporate tool cars

REASONS FOR USING CONNECTED VEHICLES*

Tool cars

In %



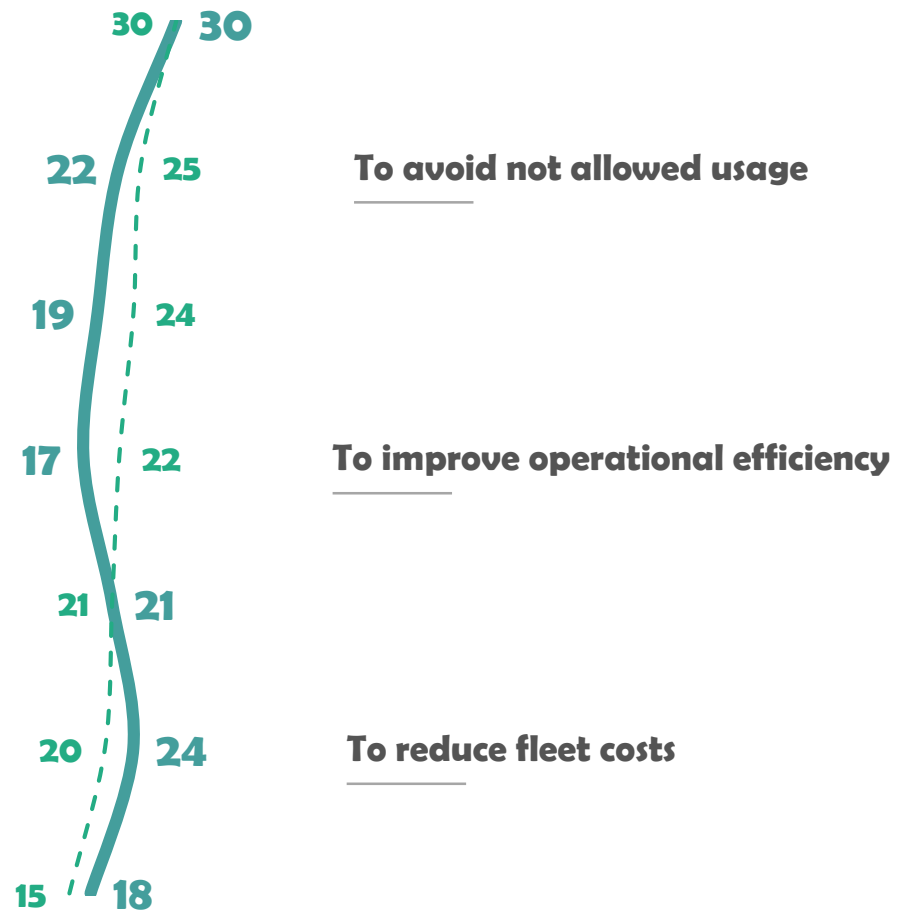
Tool cars

To locate vehicles or improve vehicle security

To improve drivers safety / behaviours

To reduce environmental impact

To optimize car sharing



*This question has changed, no comparison vs previous year

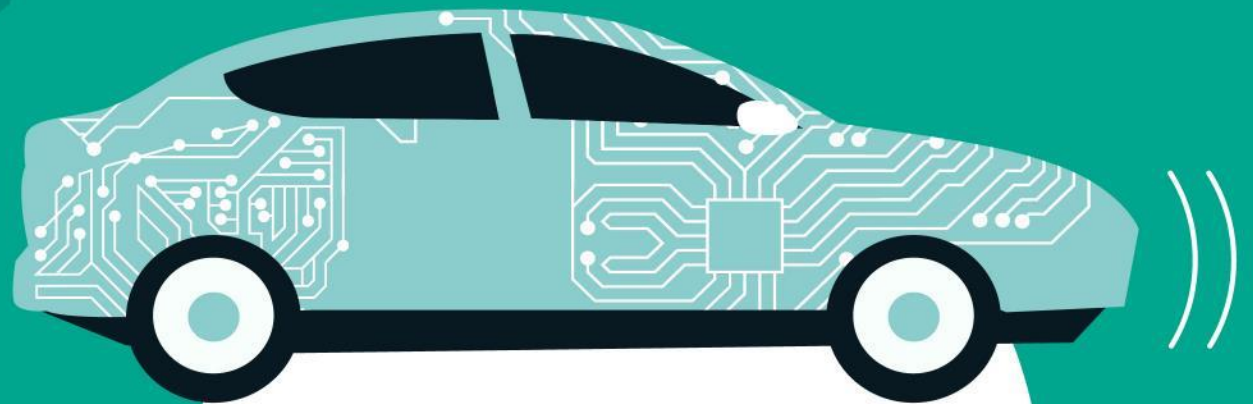
What are the two main reasons why your fleet is connected by Telematics?

Basis: companies with connected vehicles thanks to Telematics

7

CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY

D. LCVs



PROPORTION OF COMPANIES USING CONNECTED VEHICLES*

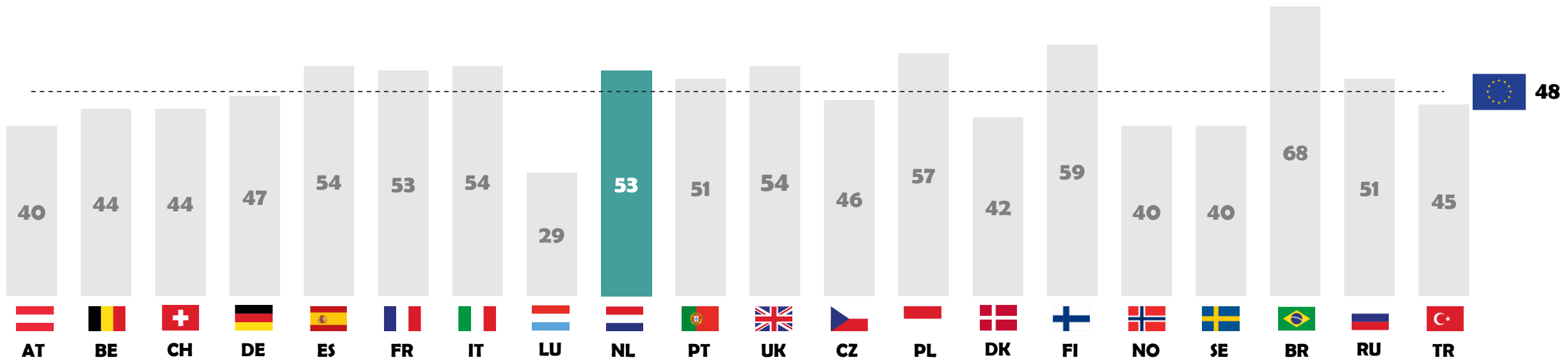
LCVs

In %



LCVs

PROPORTION OF COMPANIES HAVING IMPLEMENTED CONNECTED VEHICLES FOR THEIR LCVs



**This question has changed, no comparison vs previous year*

Is your fleet connected thanks to a telematic tool?

Telematics enables transmission of data from a vehicle such as fuel consumption, driver behaviour and vehicle location.

Telematics do not include data transmission by the mean of the users' smartphones

Basis: companies with corporate LCVs

PROPORTION OF COMPANIES USING CONNECTED VEHICLES*

LCVs

In %



LCVs

HOW TO READ THE RESULTS?

Among companies owning LCVs, 53% use connected vehicles for LCVs

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

Basis: companies with at least one LCV in fleet



TOTAL

53

48

46

24

43

45

54

58

71

62

*This question has changed, no comparison vs previous year

Is your fleet connected thanks to a telematic tool?

Telematics enables transmission of data from a vehicle such as fuel consumption, driver behaviour and vehicle location.

Telematics do not include data transmission by the mean of the users' smartphones

Basis: companies with corporate LCVs

REASONS FOR USING CONNECTED VEHICLES*

LCVs

In %



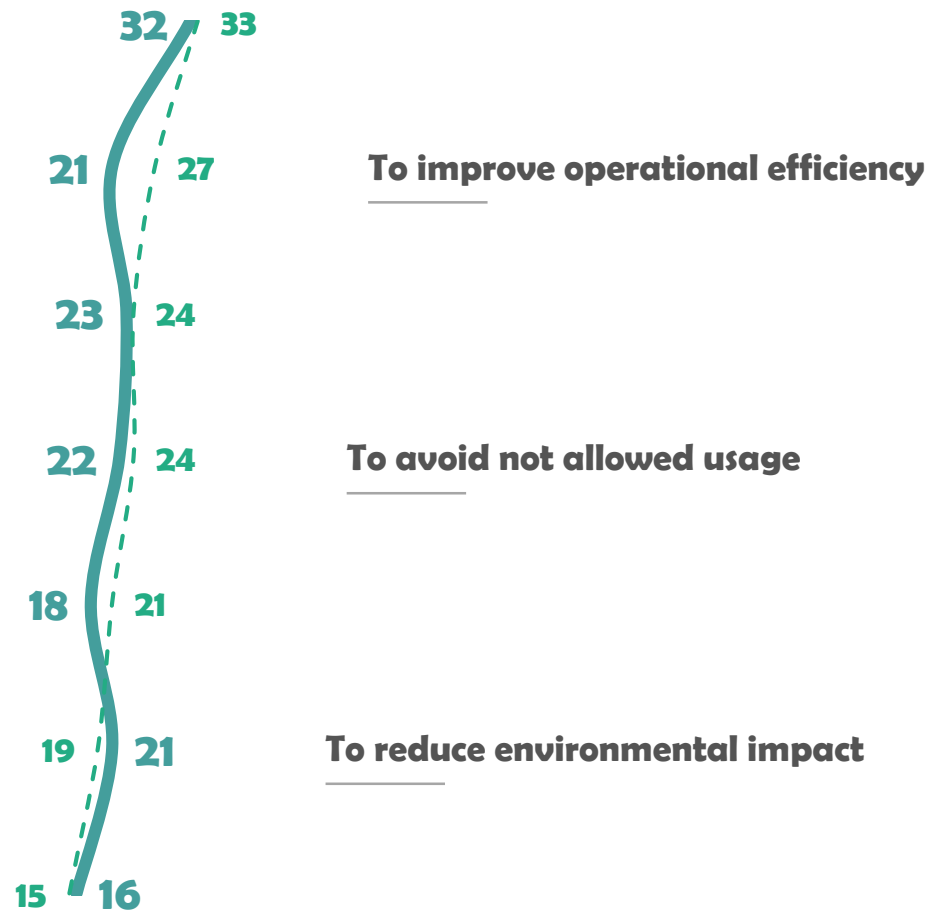
LCVs

To locate vehicles or improve vehicle security

To improve drivers safety / behaviours

To reduce fleet costs

To optimize car sharing



**This question has changed, no comparison vs previous year
What are the two main reasons why your fleet is connected by Telematics?
Basis: companies with connected vehicles thanks to Telematics*

THANK YOU

Contact: arjos.bot@arval.nl
ARJOS BOT