



# MOBILITY AND FLEET BAROMETER 2023

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1

# CONTEXT AND METHODOLOGY



# KEY THEMES FOR ARVAL MOBILITY OBSERVATORY



1

WHAT SHORT TERM  
SHIFTS ARE SHAPING THE  
MARKET?



2

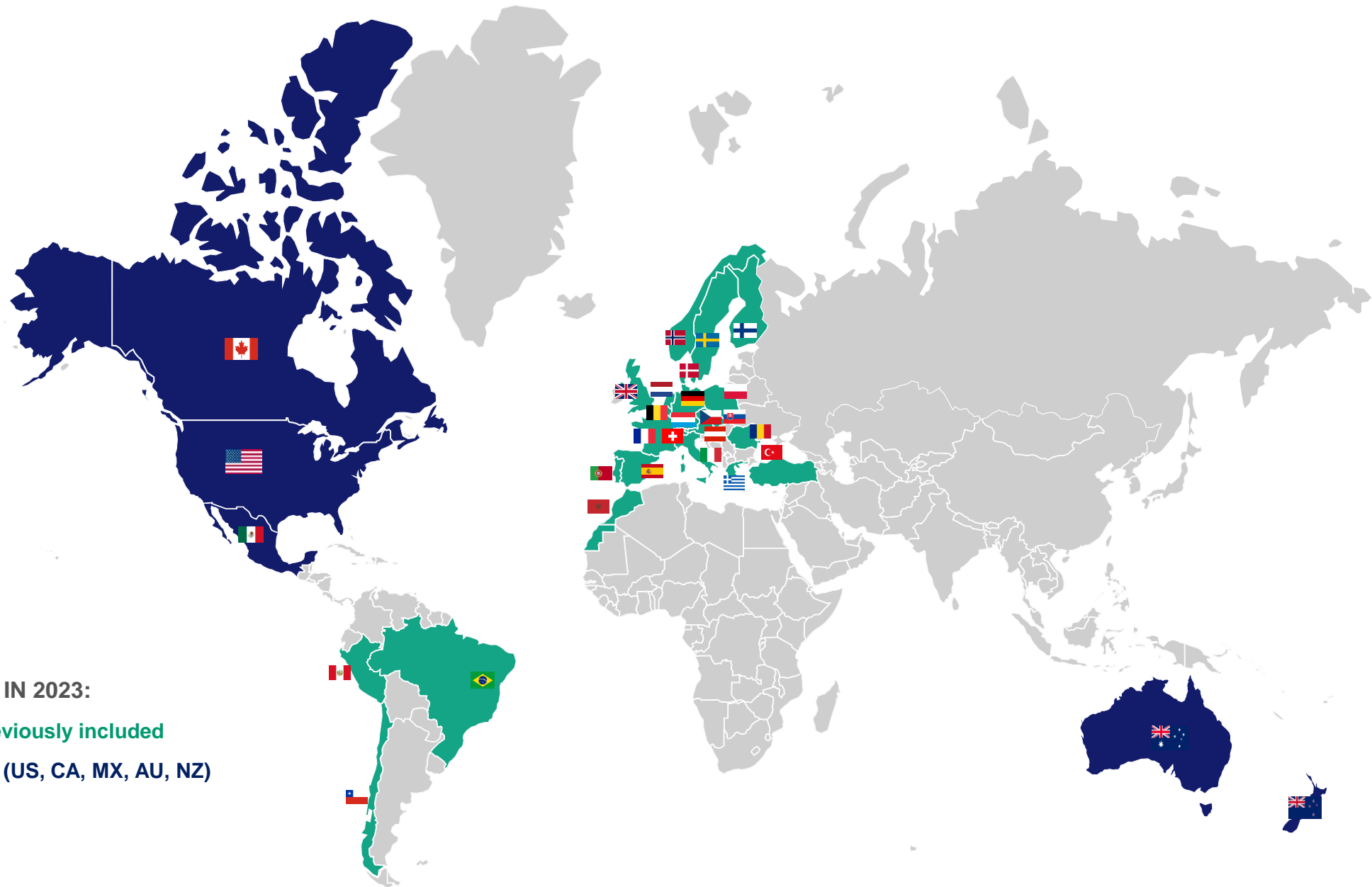
WHAT KIND OF VEHICLES  
WILL THE MARKET  
EXPECT IN 3 YEARS?



3

HOW DO MOBILITY  
SOLUTIONS IMPACT  
FLEET MANAGEMENT?

# SCOPE OF THE SURVEY



30 COUNTRIES IN 2023:

- 25 countries previously included
- 5 new countries (US, CA, MX, AU, NZ)

# COMPANY SIZE SEGMENT DEFINITION

WORLD

EUROPE

OUT OF EUROPE

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



# METHODOLOGY



DATA COLLECTION METHOD



FIELDWORK PERIOD



TARGET



QUOTAS

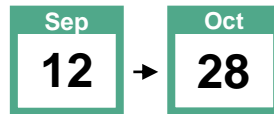


SAMPLE



DURATION OF INTERVIEW

CATI SYSTEM  
(Computer Assisted Telephone Interviewing)  
Recruitment by telephone



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

COMPANY SIZE & SECTOR

5865 | Europe  
1650 | Americas  
1107 | Rest of the world (TR,MA,AU,NZ)  
**8622** | Interviews in total

**20** minutes on average

## READING NOTES ABOUT THE REPORT

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



XX | Significantly higher than 2022 year  
XX = score 2022



XX | Significantly lower than 2022 year  
XX = score 2022

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

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

# NUMBER OF INTERVIEWS CONDUCTED IN NETHERLANDS

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



Companies with Less than 10 empl.  
**100 INTERVIEWS**



Companies with 10 - 99 empl.  
**69 INTERVIEWS**



Companies with 100 - 499 empl.  
**80 INTERVIEWS**



Companies with 500 empl. or more  
**58 INTERVIEWS**



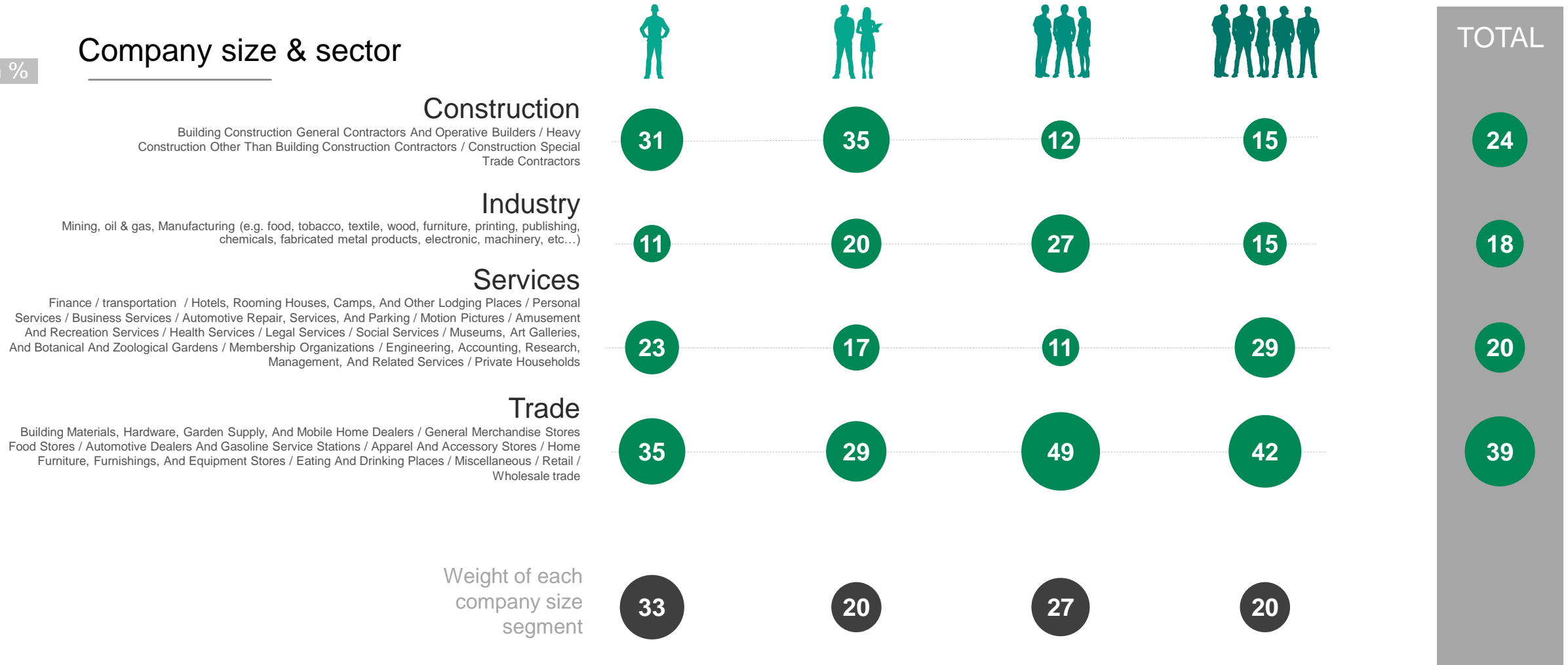


# SAMPLE STRUCTURE IN NETHERLANDS



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 SOLUTIONS 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



**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



**CAR OR CASH ALLOWANCE** \*New item

2

# EXECUTIVE SUMMARY



#1

## A CONFIDENT EXPECTATION FOR DUTCH FLEETS, DRIVEN BY BUSINESS DYNAMISM

- **Dutch companies are still showing a good confidence about the future of their fleet :**
  - Only 9% of companies anticipate the decrease of their fleet.
  - The largest companies (500 employees or more) anticipate the strongest fleet growth.
  - Despite an uncertain geopolitical and economical context, **the anticipated fleet growth is still mostly driven by business development.**
- Regarding homeworking, it has not impacted companies' mobility policy.
- **Dutch fleet managers seem more challenged by the implementation of alternative fuel technologies.**
- **The companies expect to maintain the possession length of their vehicles, shorter than in the rest of Europe.**

## INSIGHT 2: A STILL HIGH APPETITE FOR ALTERNATIVE FUEL TECHNOLOGIES FOR PASSENGER CARS FLEETS, WHILE ADOPTION FOR LCVS REMAINS SLOWER

#2

### AN EQUAL USE OF PLUG-IN HYBRID, HYBRID AND 100% BEV AMONG PASSENGER CAR FLEETS, STABLE USE OF 100% BEV FOR LCVS

- **Almost 8 companies out of 10 have already adopted at least one alternative fuel technology for their passenger cars, well above the European average : The Netherlands are among the countries where at least one alternative fuel technology is the most implemented in Europe.**
- **Overall, this earlier adoption relies equally on Plug-in hybrid (42%), 100% BEV (41%) and Hybrid (41%).**
- **Small companies are more using Hybrid (45%) while large companies have more adopted 100% BEV (48%).**
- **Motivations for these alternative technologies are mainly driven by economical (reduction of fuel expenses, and total cost of ownership for LCVs) and environmental reasons (reduction of CO2 impact).**
- **The high purchase price remains the strongest barrier, but overall, the perception of barriers to BEV adoption is decreasing this year, whether for passenger cars or for LCVs.**
- **Lastly, more companies keep subsidising the installation of charging points at employees' homes.**

### #3

### DUTCH COMPANIES ARE AT THE FOREFRONT OF MOBILITY SOLUTIONS IMPLEMENTATION

- A majority of Dutch companies propose at least one alternative mobility solution:
  - With 8 companies out of 10 having adopted at least one mobility solution, Netherlands are positioned above the European average.
  - Mobility budget is the most widespread alternative, driven by large companies.
- 38% of companies are interested in offering employees a mobility budget, primarily in order to reduce the costs of mobility and to offer more options and flexibility to employees.
- Lastly, more companies are implementing or considering a strategy on the mobility CO2 footprint compared to 2022.

#4

### AND A GOOD POTENTIAL FOR GROWTH

- **Operating leasing is the first fleet financing method used by Dutch companies with Financial leasing.**
- **This financing method is even more common among large companies (500 employees and more) : almost half of them companies finance their fleets with Operating leasing.**
- **And Operating leasing shows a good potential for growth : in line with European trend, one third of Dutch companies intend to introduce or increase the use of Operating leasing.**

#5

### AN TREND IN LINE WITH THE EUROPEAN AVERAGE

- **Almost half of Dutch companies are using Telematics whether for passenger cars or LCVs.**
- **In details, the level of connected vehicles is the same within passenger car fleets and LCV fleets.**
- **This growth is due to a higher equipment of passenger cars.**
- **The main reasons to implement telematics are :**
  - **the possibility to locate vehicles or improve vehicle security**
  - **to improve operational efficiency**



3

# WHAT ARE THE MAIN CHARACTERISTICS OF THE FLEETS?



# DUTCH COMPANIES STAY OPTIMISTIC FOR THE FUTURE OF THEIR FLEET, ESPECIALLY BIG COMPANIES

1

• Even though slightly below the European level, Dutch companies keep a good confidence regarding the future of their fleets:

- 86% of the companies anticipate the increase or the stability of their fleets,
- The biggest companies (500 employees or more) anticipate the strongest fleet growth (37% vs 23% in overall).
- To note that over the last 3 years, if fleets are still on the increase, there is a slow down (decreasing balance between increasing fleets and decreasing fleets).

The fleet growth relies by far on business development, in line with European results. On the second place comes HR needs, but to the lesser extent.

2

• Despite the development of **homeworking**, it had a very weak impact on companies' mobility policy: only 13% of companies have implemented changes or consider some adjustments in the future.

3

• For Dutch fleet managers, **implementing alternative fuel technologies is the most important challenge** in the next 3 years.

4

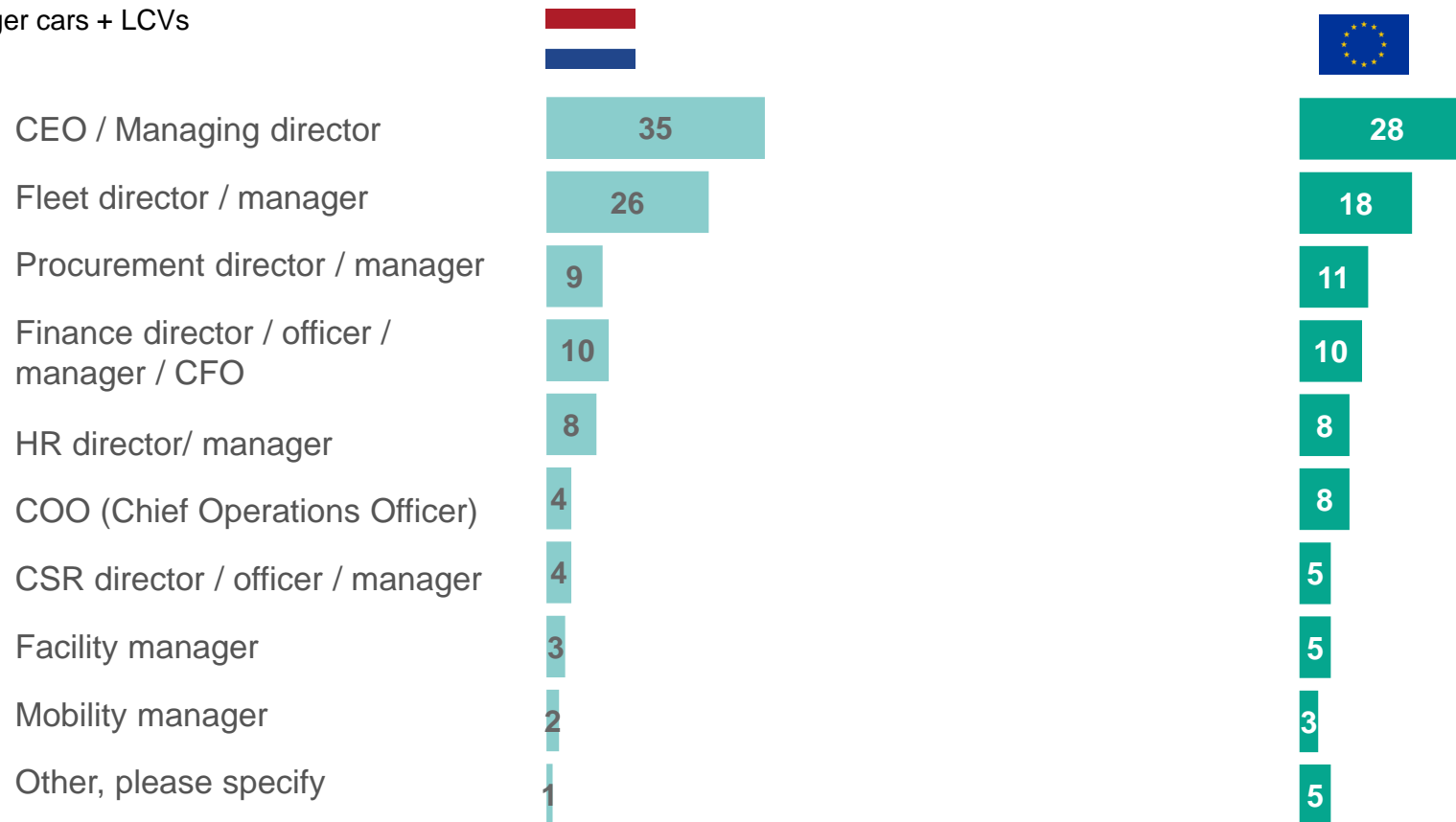
• Finally, the companies expect to maintain the possession length of their passenger cars and LCVs, still shorter than in Europe on average.

# RESPONDENTS POSITION WITHIN THE COMPANY

In %



Passenger cars + LCVs



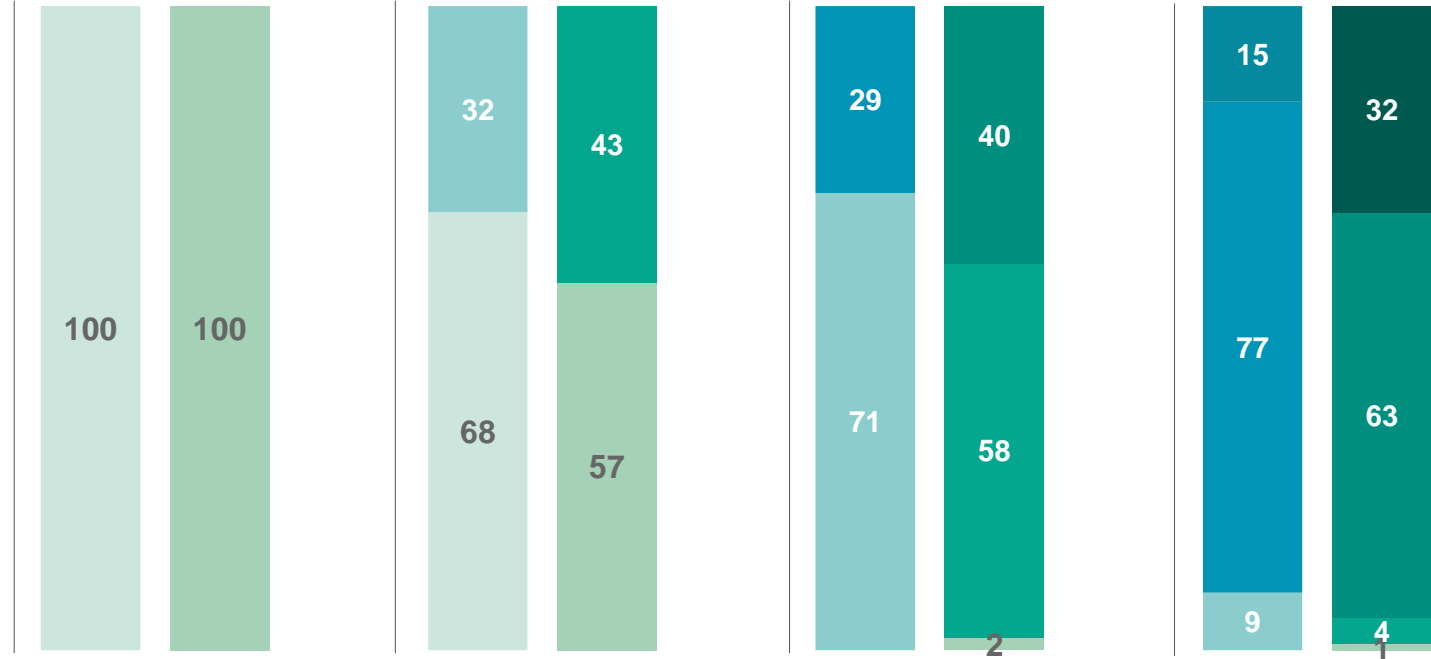
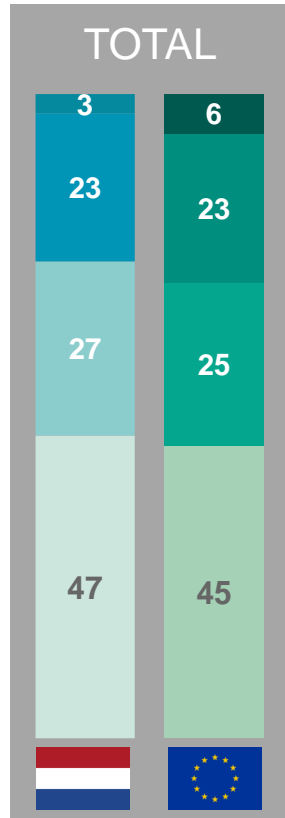
# NUMBER OF VEHICLES IN FLEET

In %



Passenger cars + LCVs

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

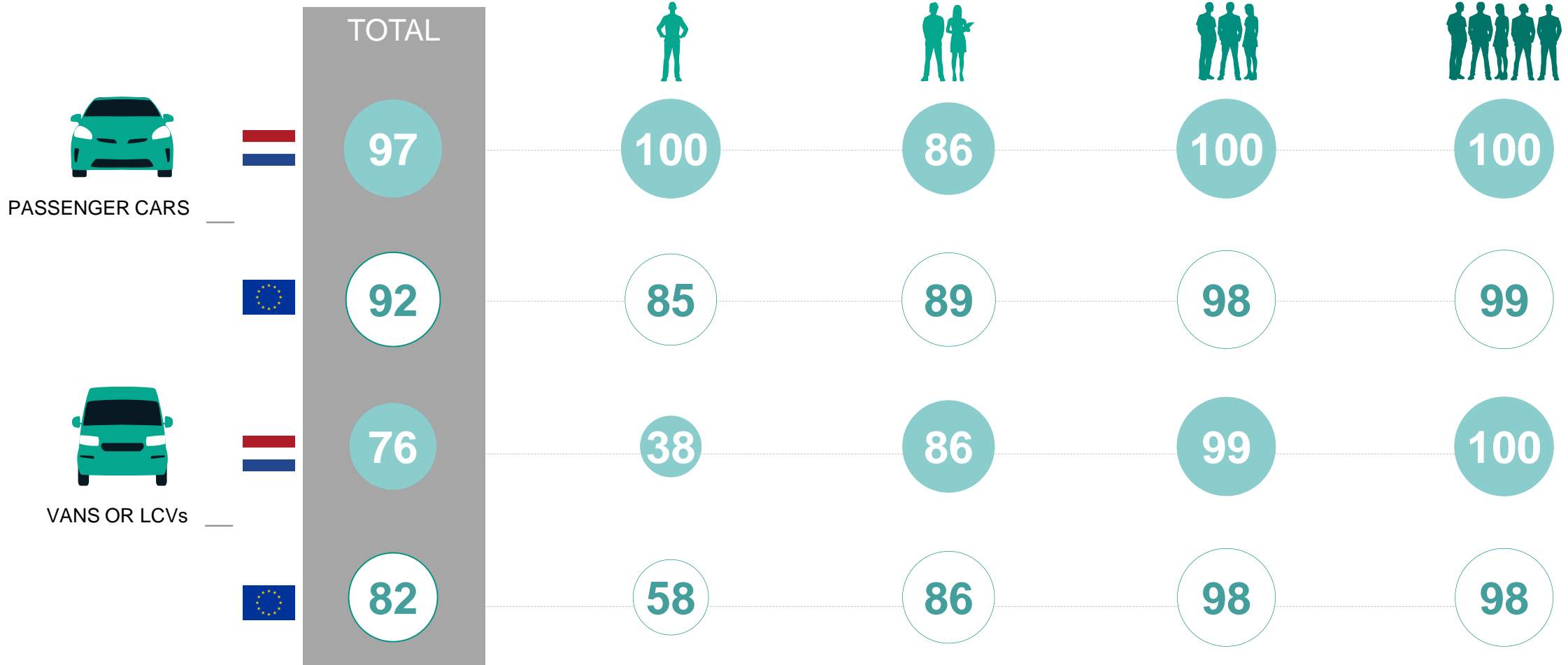


Can you please tell us the total number of vehicles of less than 3.5 tons in your fleet?  
Basis: companies with corporate vehicles = 100%

# 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%

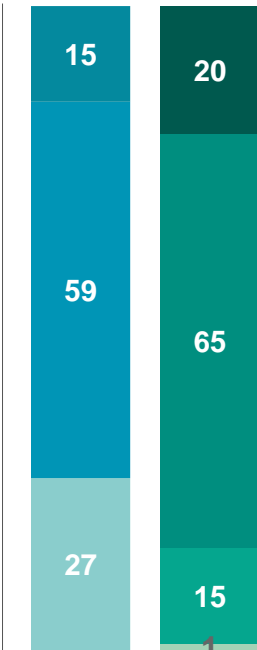
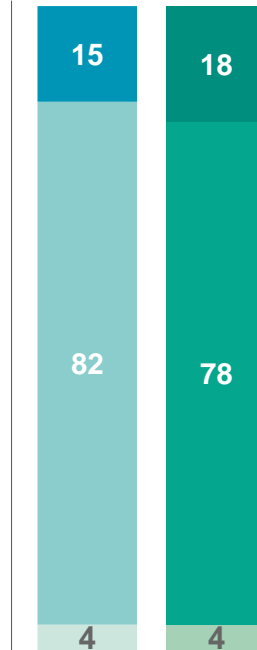
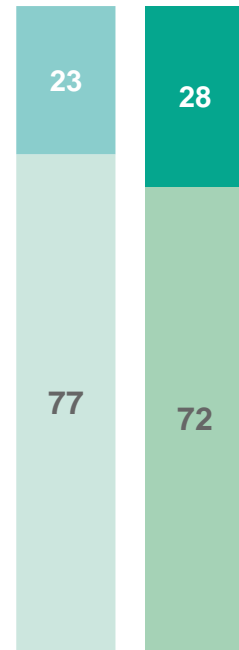
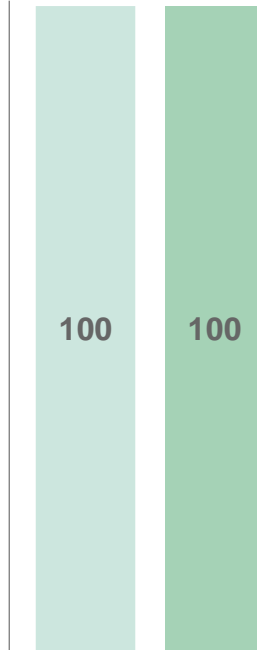
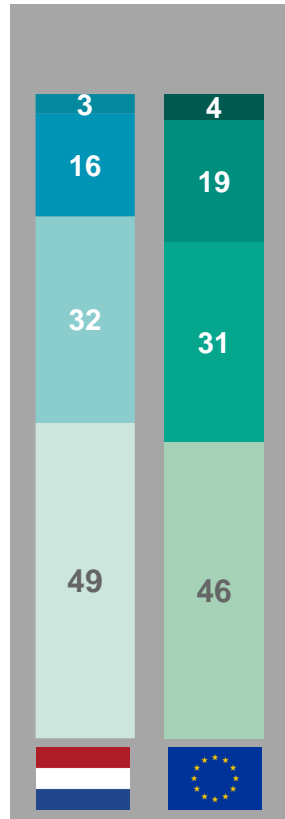
# NUMBER OF PASSENGER CARS IN FLEET

In %



Passenger cars

- 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 cars in your fleet?  
Basis: companies with passenger cars

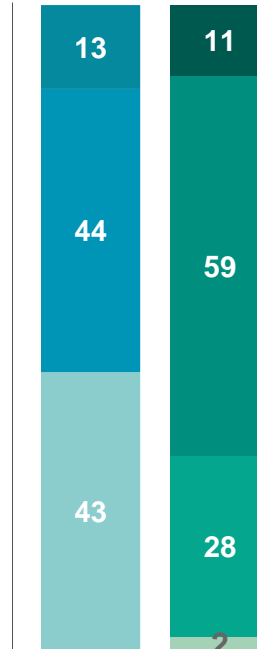
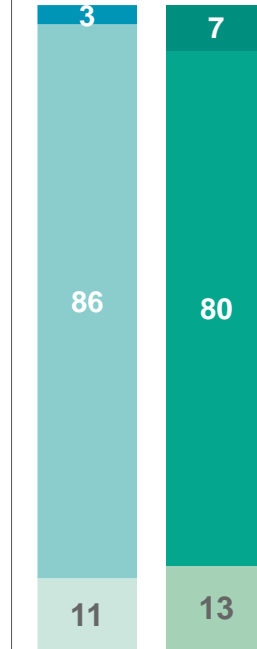
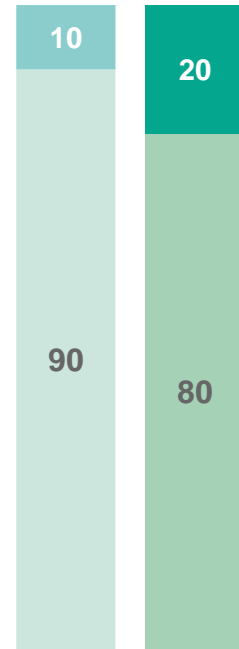
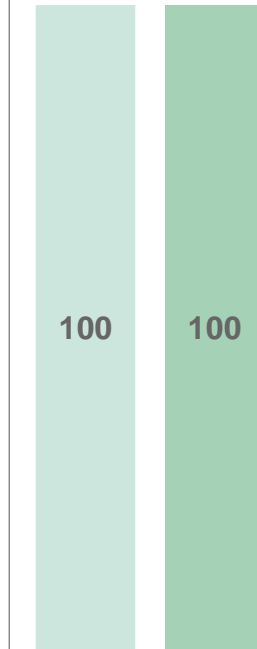
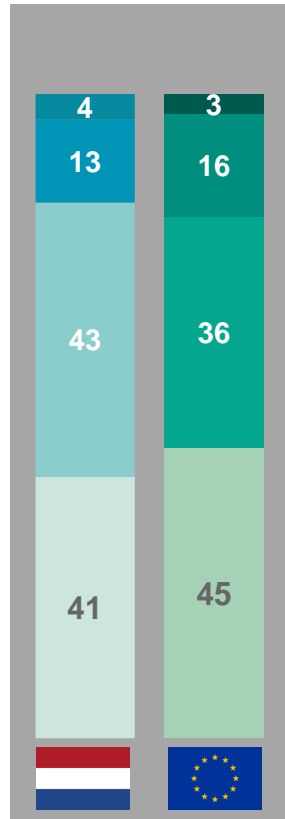
# NUMBER OF LCVS IN FLEET

In %



LCVs

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



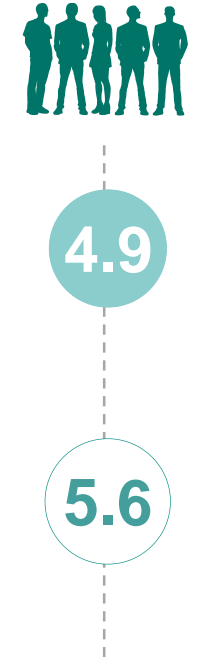
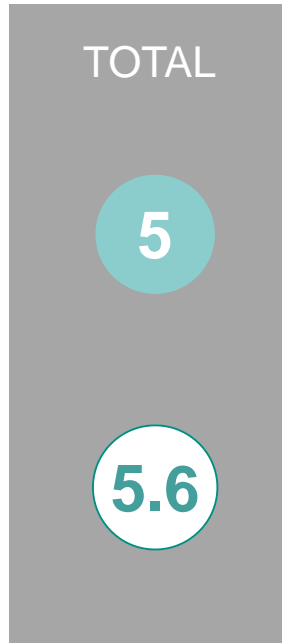
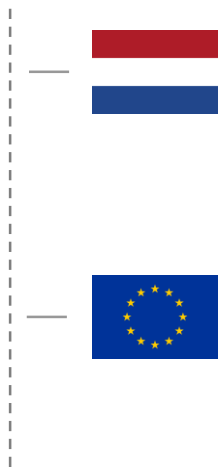
And can you please tell us the total number of LCVs or vans in your fleet?  
Basis: companies with LCVS

# VEHICLES POSSESSION LENGTH



Passenger cars + LCVs

AVERAGE IN YEARS



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



# PASSENGER CARS POSSESSION LENGTH



New question added in 2023  
And how long do you keep your passenger cars (before being sold or returned to the leasing company)?  
Basis: companies with passenger cars

# LCVS POSSESSION LENGTH



LCVs

AVERAGE IN YEARS



5.1



5.8

TOTAL



5.2

5.8



5

5.9



5.3

5.7



5

5.7

# FLEET GROWTH POTENTIAL

## HOW TO READ THE RESULTS ?

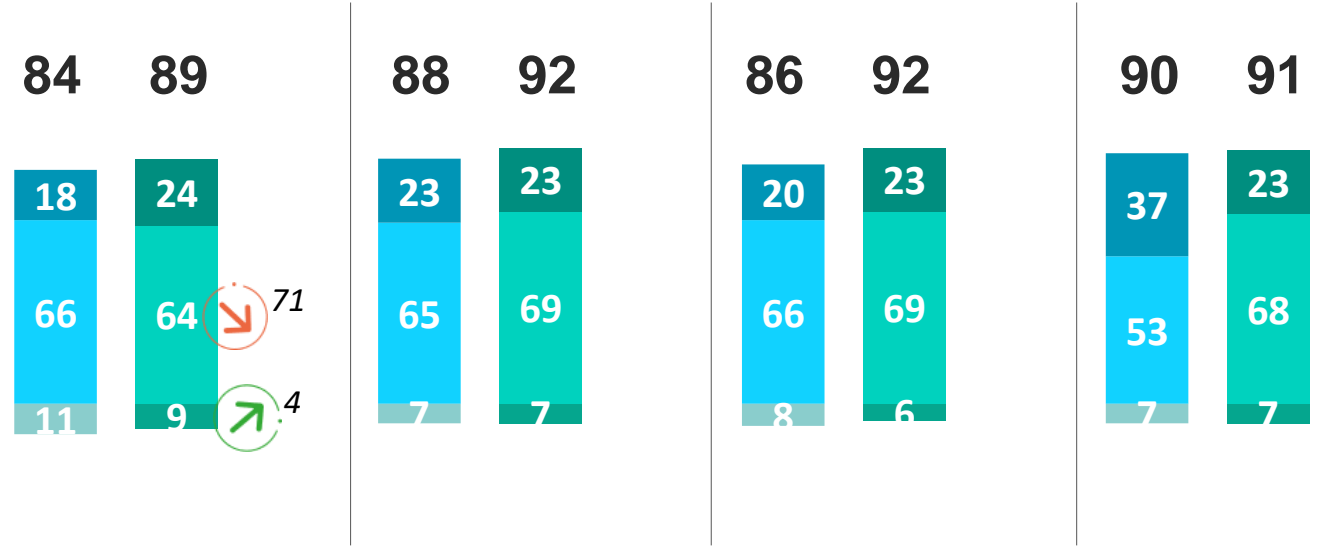
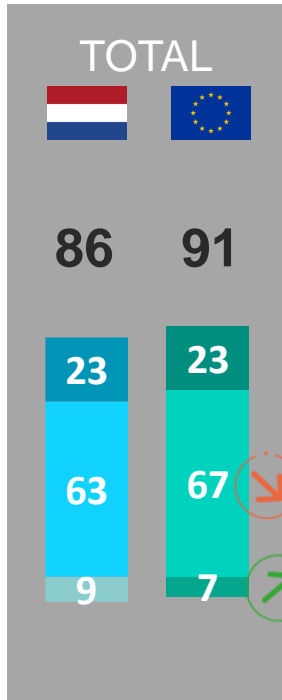
In Netherlands, 86% of the companies declare that in the next 3 years their company fleet will remain stable or increase.

In %



Passenger cars + LCVs

% Stable or increase



BALANCE in pts (INCREASE ⊖ DECREASE)



2023	+15	+16	+7	+15	+16	+16	+12	+17	+31	+16
2022	+23	+18	+28	+19	+16	+17	+10	+17	+41	+17
2021	+46	+35	+41	+22	+35	+31	+45	+43	+67	+50

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

# FLEET GROWTH POTENTIAL

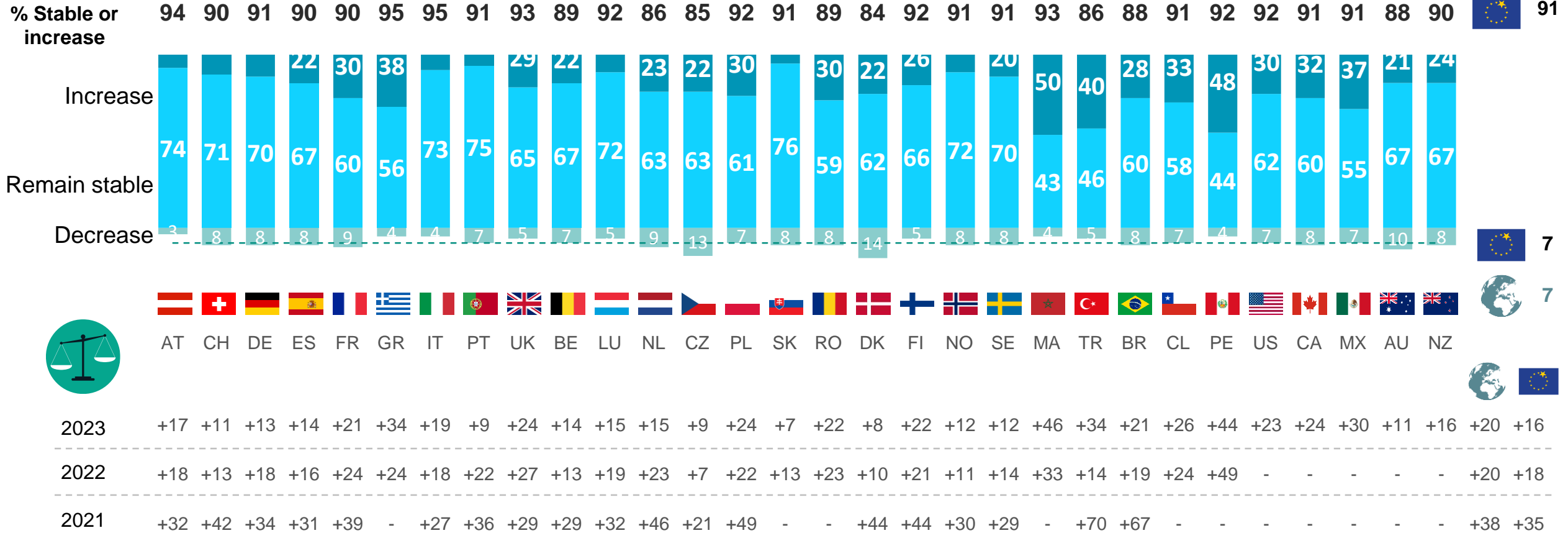
In %



Passenger cars + LCVs

## HOW TO READ THE RESULTS ?

In Netherlands, 86% of the companies declare that in the next 3 years their company fleet will remain stable or increase.



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%

# PASSENGER CAR FLEET GROWTH POTENTIAL

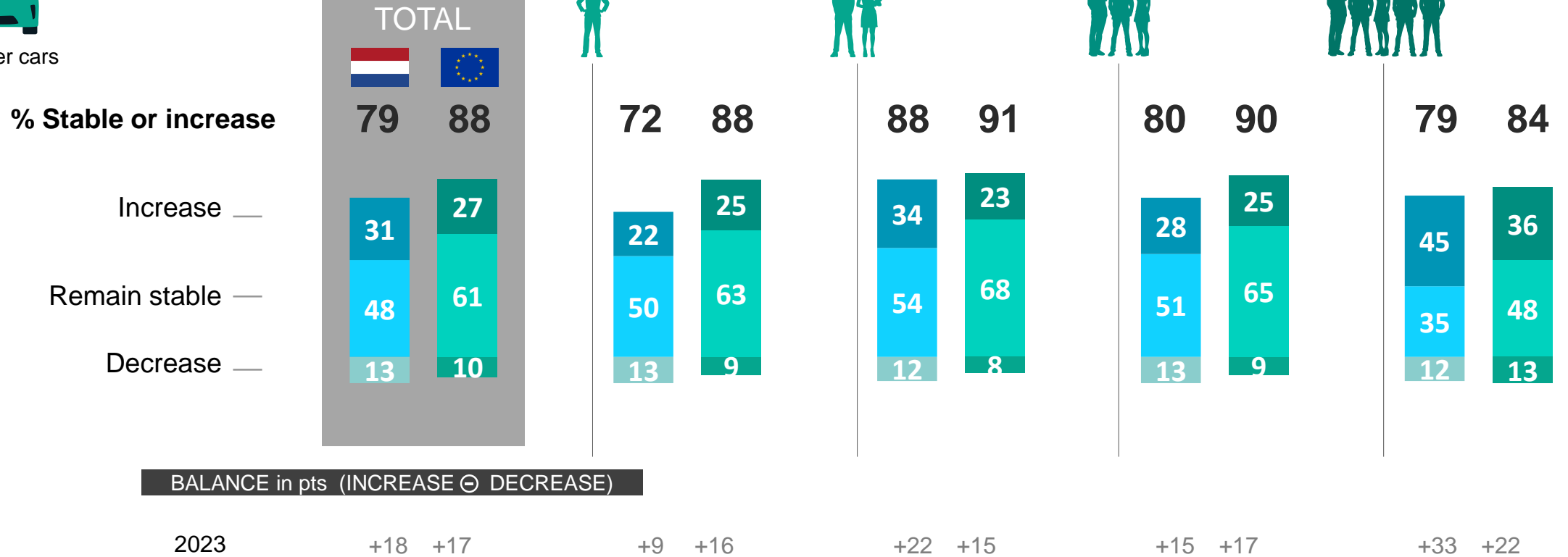
In %



Passenger cars

## HOW TO READ THE RESULTS ?

In Netherlands, 79% of the companies declare that in the next 3 years the total number of passenger cars will remain stable or increase.



# PASSENGER CAR FLEET GROWTH POTENTIAL

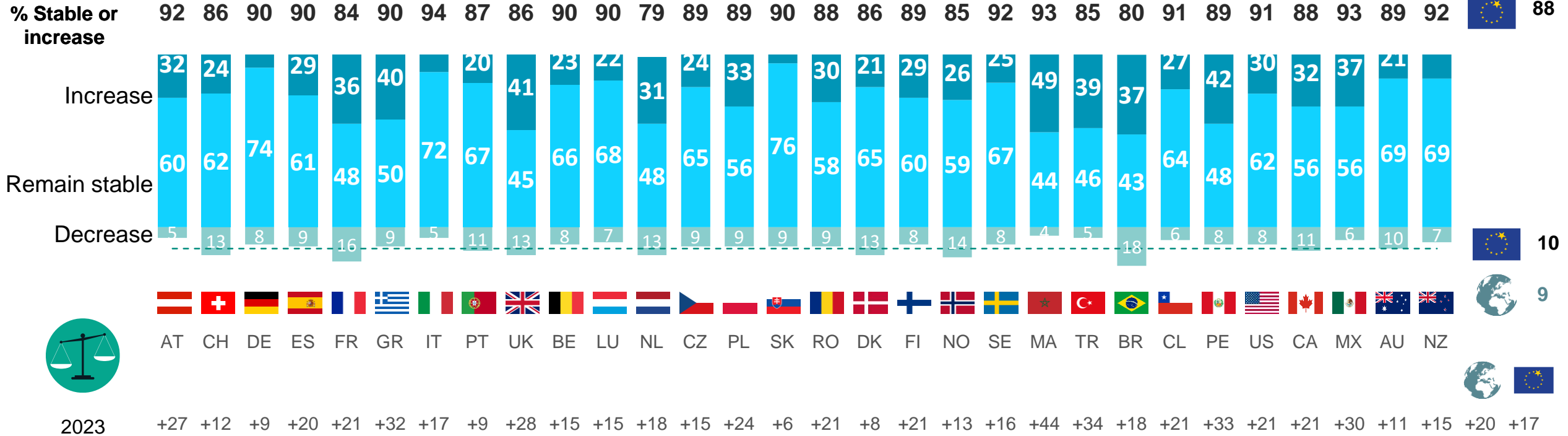
## HOW TO READ THE RESULTS ?

In Netherlands, 79% of the companies declare that in the next 3 years their company fleet of passenger cars will remain stable or increase.

In %



Passenger cars



2023

New question added in 2023

In the next three years, do you think that the total number of your passenger cars will...

Basis: companies with passenger cars

# LCVS FLEET GROWTH POTENTIAL

In %

**HOW TO READ THE RESULTS ?**  
*In Netherlands, 83% of the companies declare that in the next 3 years the total number of LCVs will remain stable or increase.*



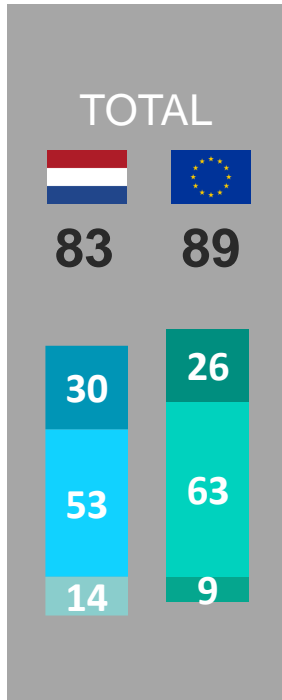
LCVs

% Stable or increase

Increase

Remain stable

Decrease

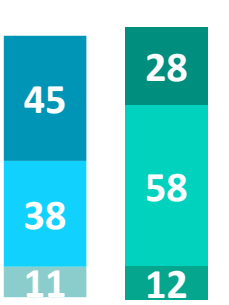
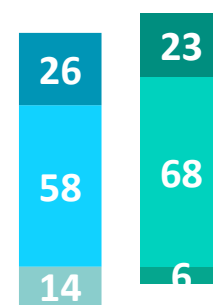
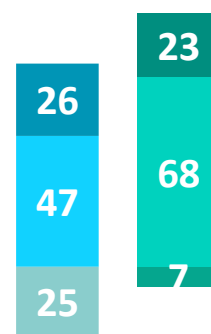
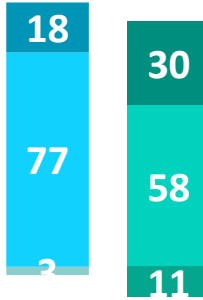


95 88

73 91

84 92

83 86



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

2023

+16 +17

+16 +19

0 +15

+12 +17

+34 +17

New question added in 2023  
*In the next three years, do you think that the total number of your light commercial vehicles or vans will...*  
*Basis: companies with LCVS*

# LCVS FLEET GROWTH POTENTIAL

## HOW TO READ THE RESULTS ?

In Netherlands, 83% of the companies declare that in the next 3 years their company fleet of LCVs will remain stable or increase.

In %



LCVs

% Stable or increase

Increase

Remain stable

Decrease



90



89



9



8



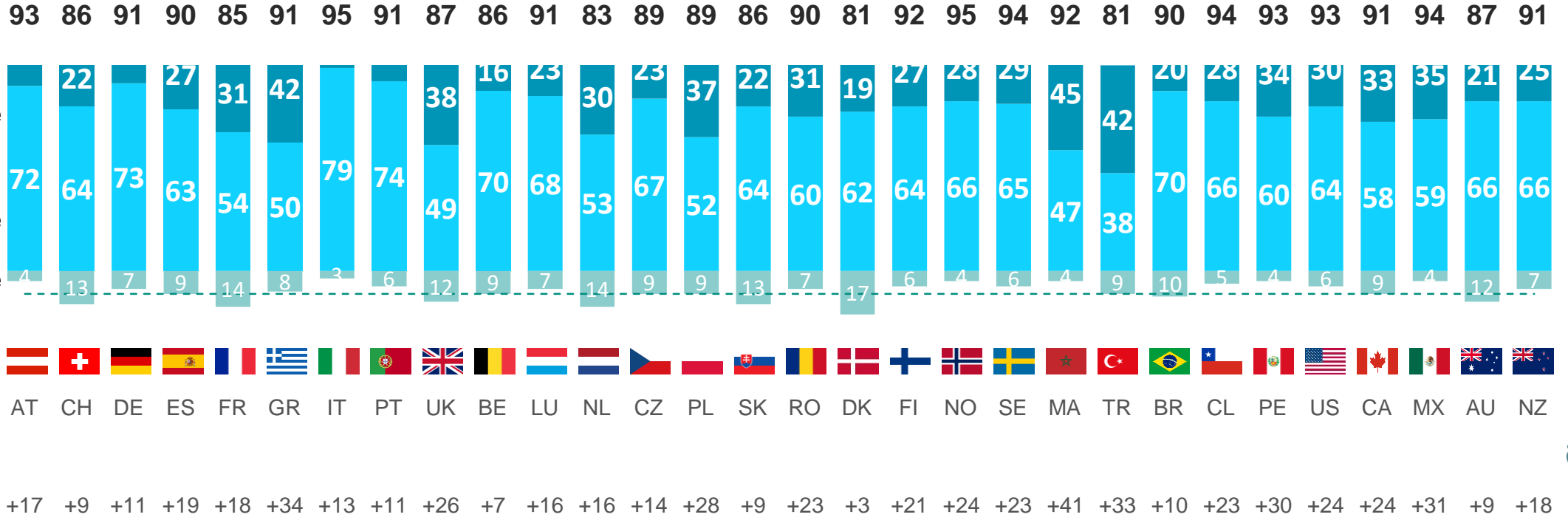
8



17



2023



New question added in 2023

In the next three years, do you think that the total number of your light commercial vehicles or vans will...

Basis: companies with LCVs



# REASON FOR FUTURE FLEET INCREASE



In %

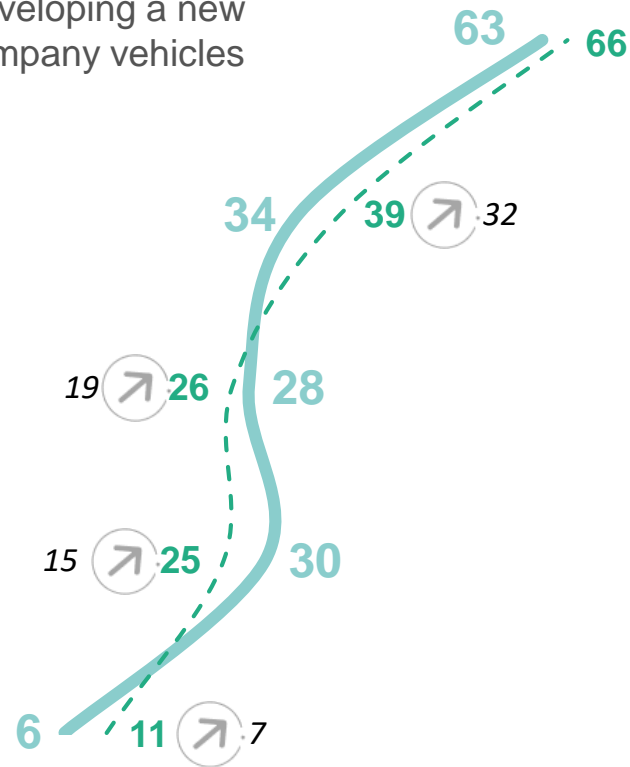


Passenger cars + LCVs

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)

Because of tax decreases



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

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

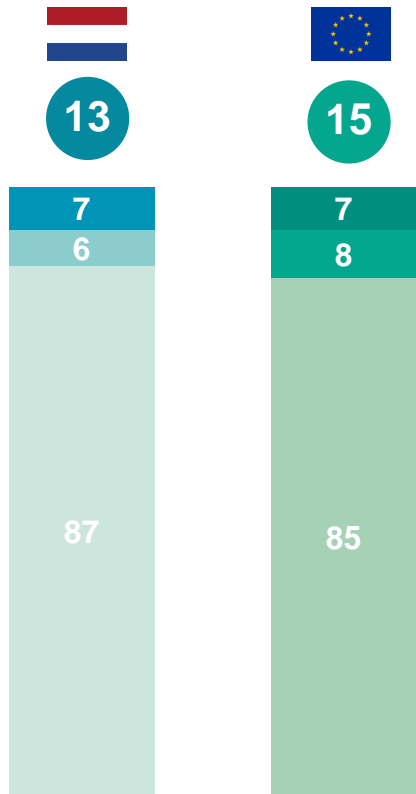
Why do you think the total number of vehicles in your company fleet will increase?  
**Basis: companies expecting an increase of the fleet**

# MOBILITY POLICY ADAPTATION COINCIDING WITH HOMEWORKING

In %



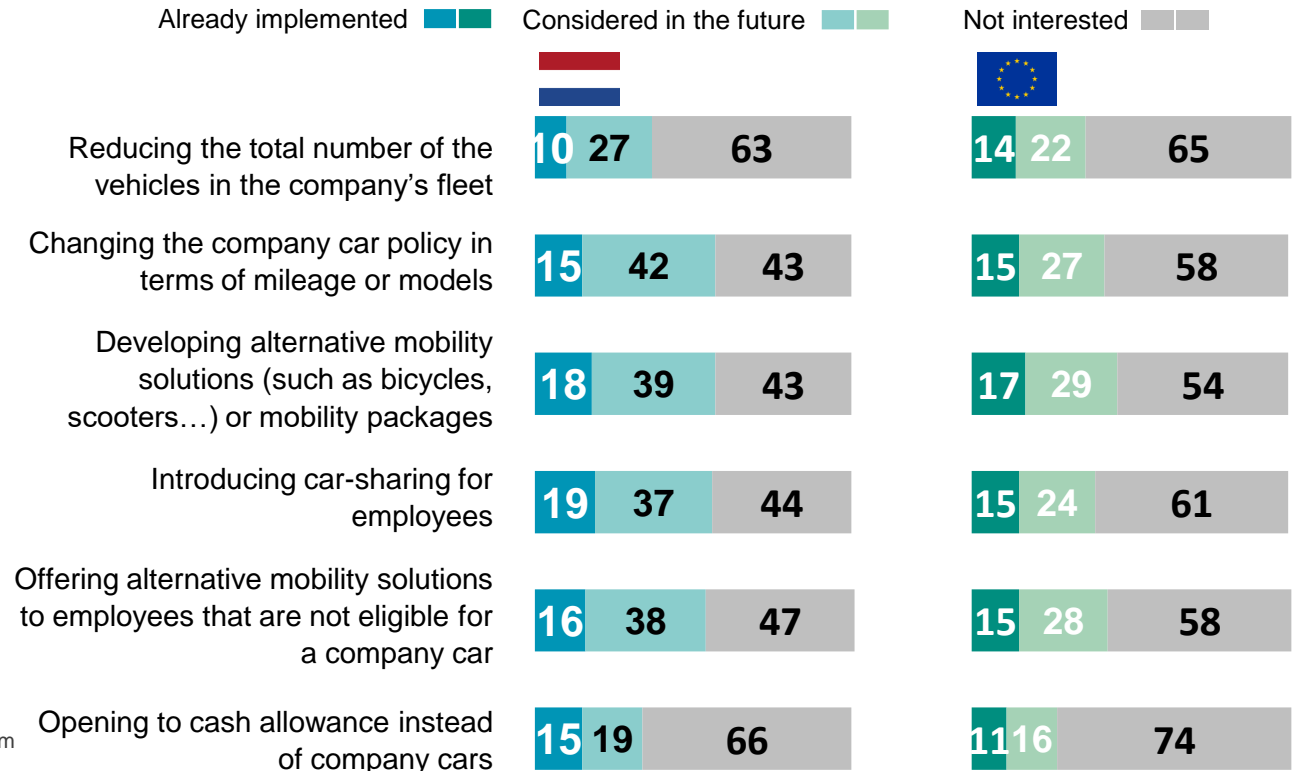
Passenger cars + LCVs



## NET CHANGED THE POLICY OR CONSIDER CHANGING

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

**HOW TO READ THE RESULTS ?**  
 In Netherlands, among the companies that changed or consider changing their mobility policy, 10% have already reduced the total number of the vehicles in the company's fleet.



\*New item

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

This question has been asked differently in 2023.

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?

Question asked to respondents that are aware of mobility solutions

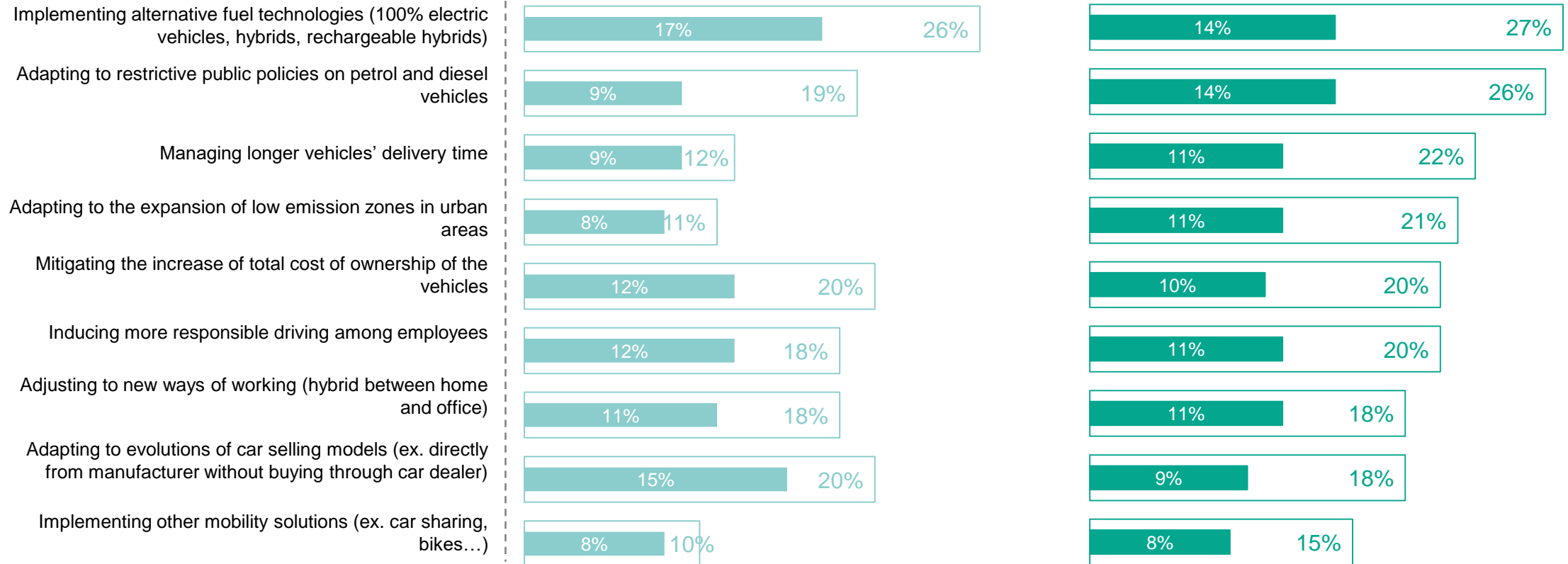
# MOST IMPORTANT CHALLENGES EXPECTED

In %



Passenger cars + LCVs

Nb 1 challenge  
 Top 3 challenges



New question added in 2023

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

4

# HOW ARE COMPANIES FINANCING THEIR FLEET?



# A GOOD POTENTIAL FOR GROWTH FOR OPERATING LEASING, ALREADY THE FIRST FLEET FINANCING METHOD, EX-AEQUO WITH FINANCIAL LEASING

*To note : in 2023, question about financing methods repartition was asked differently, which means there will be no comparison with 2022*

1

- With Financial leasing, **Operating leasing is the first ex-aequo fleet financing method used by Dutch companies (33%).**

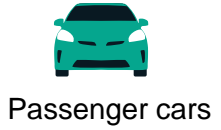
**This financing method is even more common among larger companies (500 employees and more) : almost half of big companies finance their fleets by Operating leasing.**

2

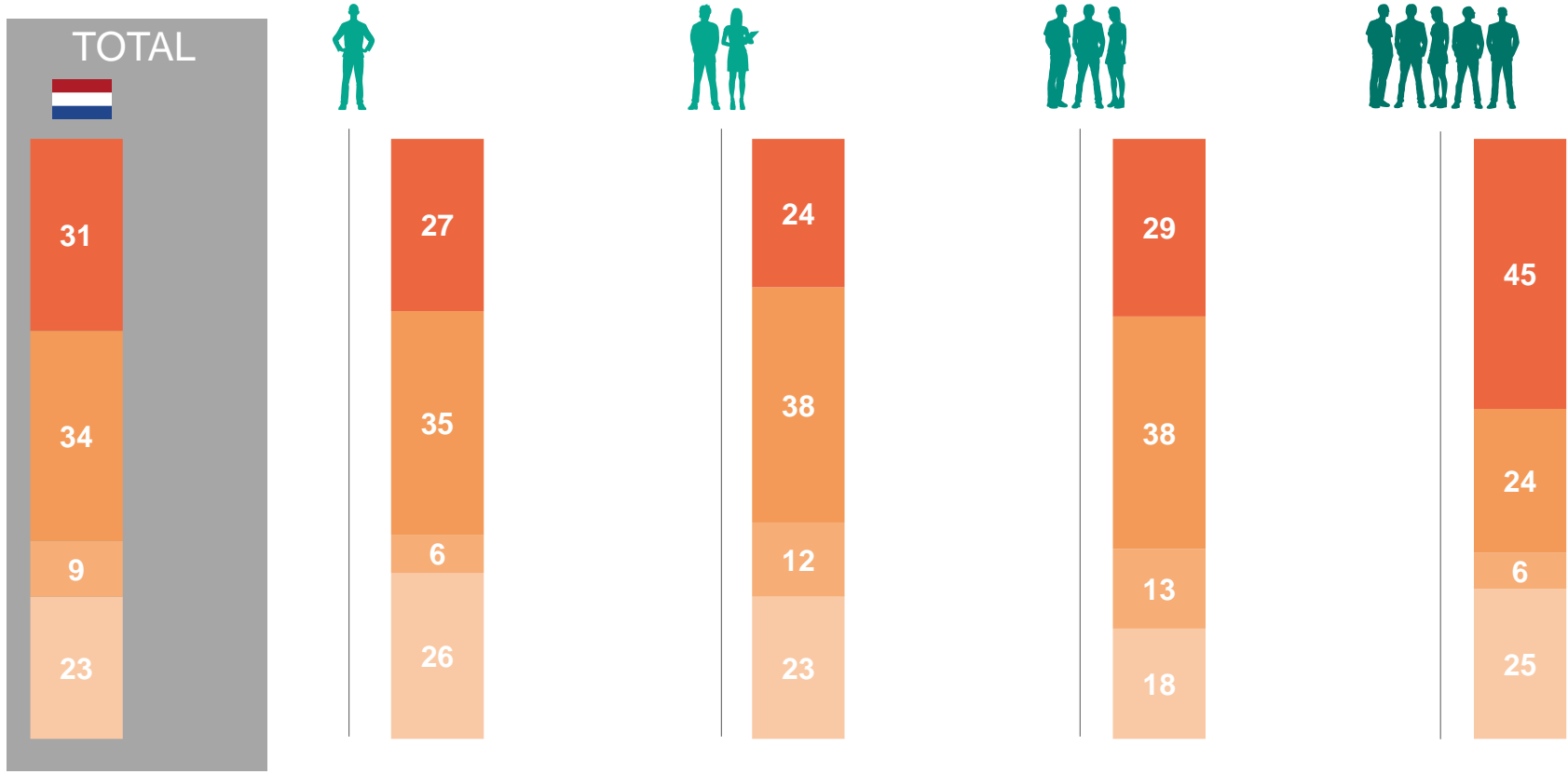
- **And Operating leasing shows a good potential for growth : in line with European trend, a third of Dutch companies intend to introduce or increase the use of Operating leasing.**

# MAIN PASSENGER CARS FINANCING METHOD

In %



- Operating leasing
- Financial leasing
- Credit
- Outright purchase



New question added in 2023

And what is the main method used to finance your passenger cars today?  
 Basis: companies with passenger cars

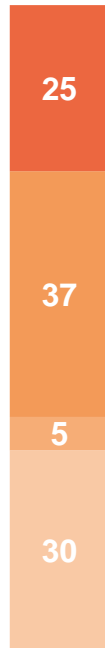
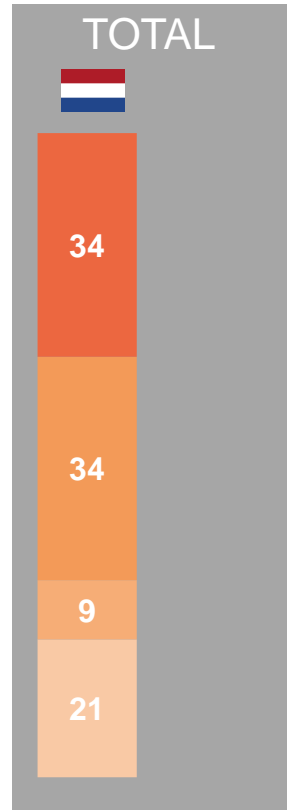
# MAIN LCV FINANCING METHOD

In %



LCVs

- Operating leasing ■
- Financial leasing ■
- Credit ■
- Outright purchase ■



New question added in 2023

And what is the main method used to finance your LCVs today?

**Basis: companies with LCVs**

# 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 %



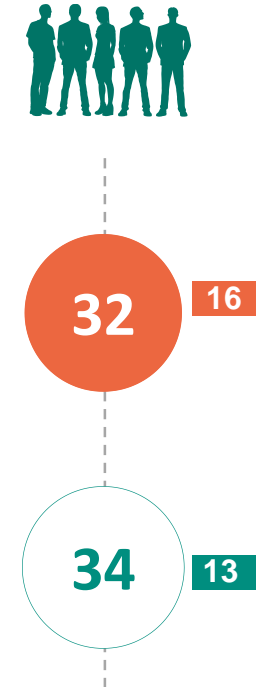
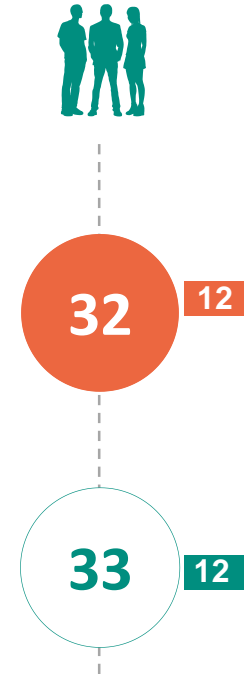
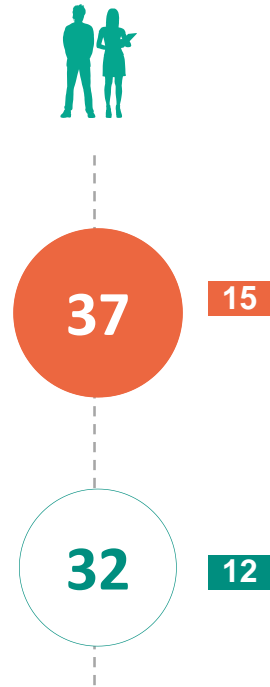
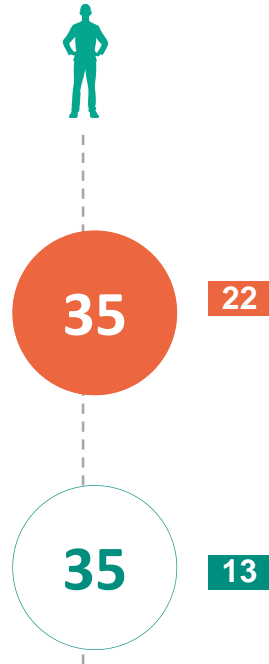
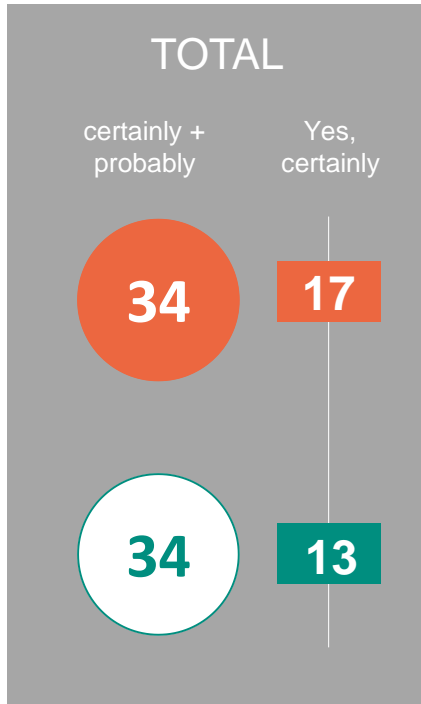
Passenger cars + LCVs



—



Excluding DE

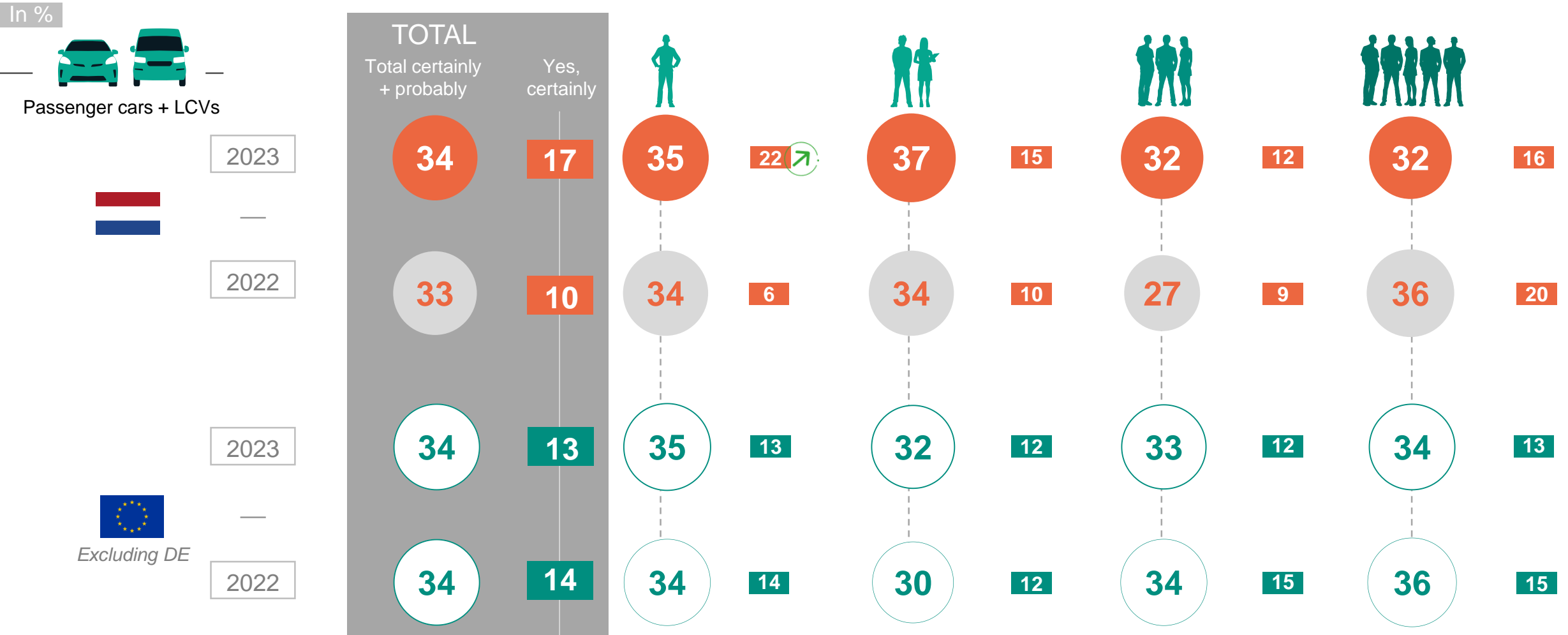


\*All countries except DE: In the next three years do you intend to introduce or increase use of Operating Lease to finance your corporate fleet?  
Basis: companies with corporate vehicles = 100%



# 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



\*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?



# A STRONG APPETITE FOR ALTERNATIVE TECHNOLOGIES

1

- With almost **8 out of 10 companies** which have already adopted at least one alternative fuel technology, The Netherlands are among the most advanced countries in terms of alternative technologies implementation in Europe, well above the European average (58%).

When adding the companies which consider the adoption of these kind of technologies in the next years, **the potential reaches 90% of companies.**

2

- Overall, **100% BEV, Plug-in Hybrid and Hybrid are equally widespread** for passenger cars, at higher levels than European averages : 4 out of 10 companies have already adopted Plug-in Hybrid, same for Hybrid and 100% BEV. But there are differences according the size of companies : while **small companies have more adopted Plug-in Hybrid** to date, **big companies have implemented more 100% BEV.**

3

- The adoption of these technologies **for passenger cars** relies on **economic reason** (reducing the fuel expenses) and on **lower environmental impact**, in line with European trend. **For LCVs fleets, the total cost of ownership** is also mentioned by fleet managers.

As in the rest of Europe, **the adoption of alternative technologies is slower for LCV fleets** but Dutch companies are still among the most advanced European countries, with an implementation to date twice as high as in Europe on average, driven by 100% BEV. Hydrogen Fuel cell is emerging and shows some growth potential, as 11% of Dutch companies have already or intend to implement it.

4

- High purchase price remains the strongest barrier but generally speaking, the perception of barriers to BEV adoption is decreasing this year, which tends to show a “normalization” of BEV.

5

- To address these barriers and support the adoption of 100% BEV, **more companies subsidise cost of home installations of charging points for drivers.**

# CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

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

In %



Passenger cars

## HOW TO READ THE RESULTS ?

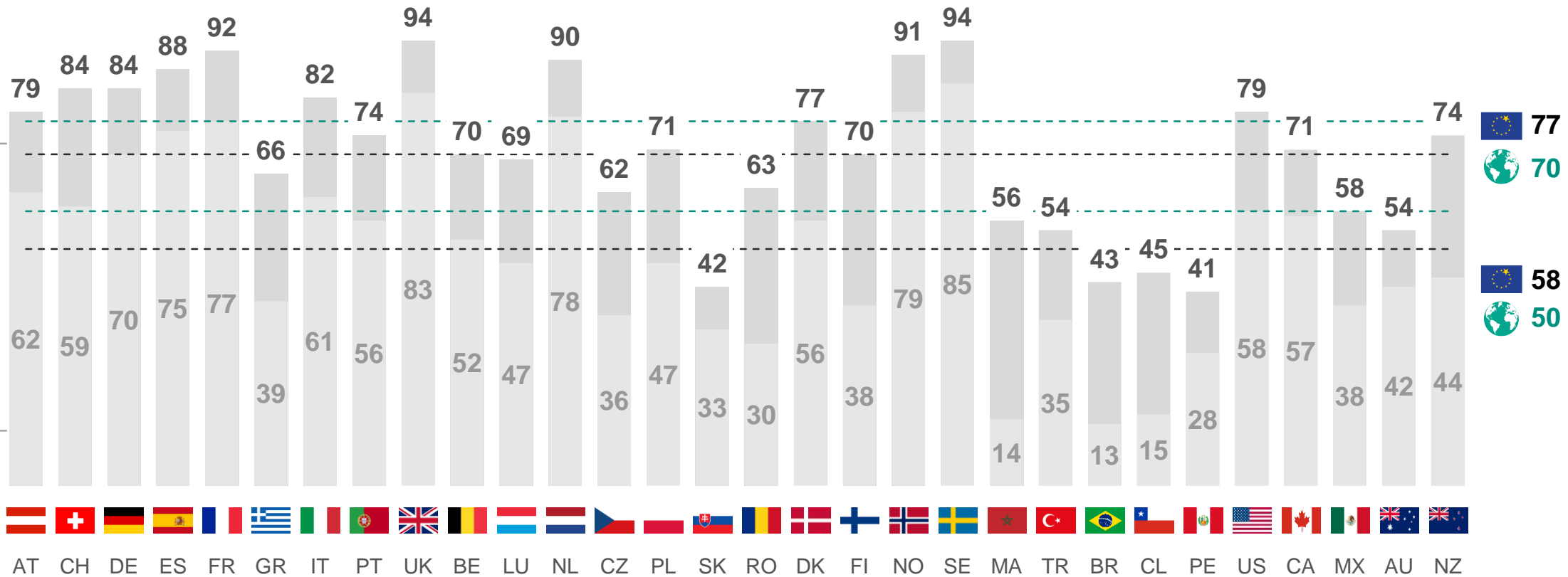
In Netherlands, 90% of the companies are already using or consider to implement at least one alternative technology in the next 3 years. 78% of the companies is currently using at least one.



ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS



ALREADY USING




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

**Basis: companies with passenger cars**

# CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

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

In %

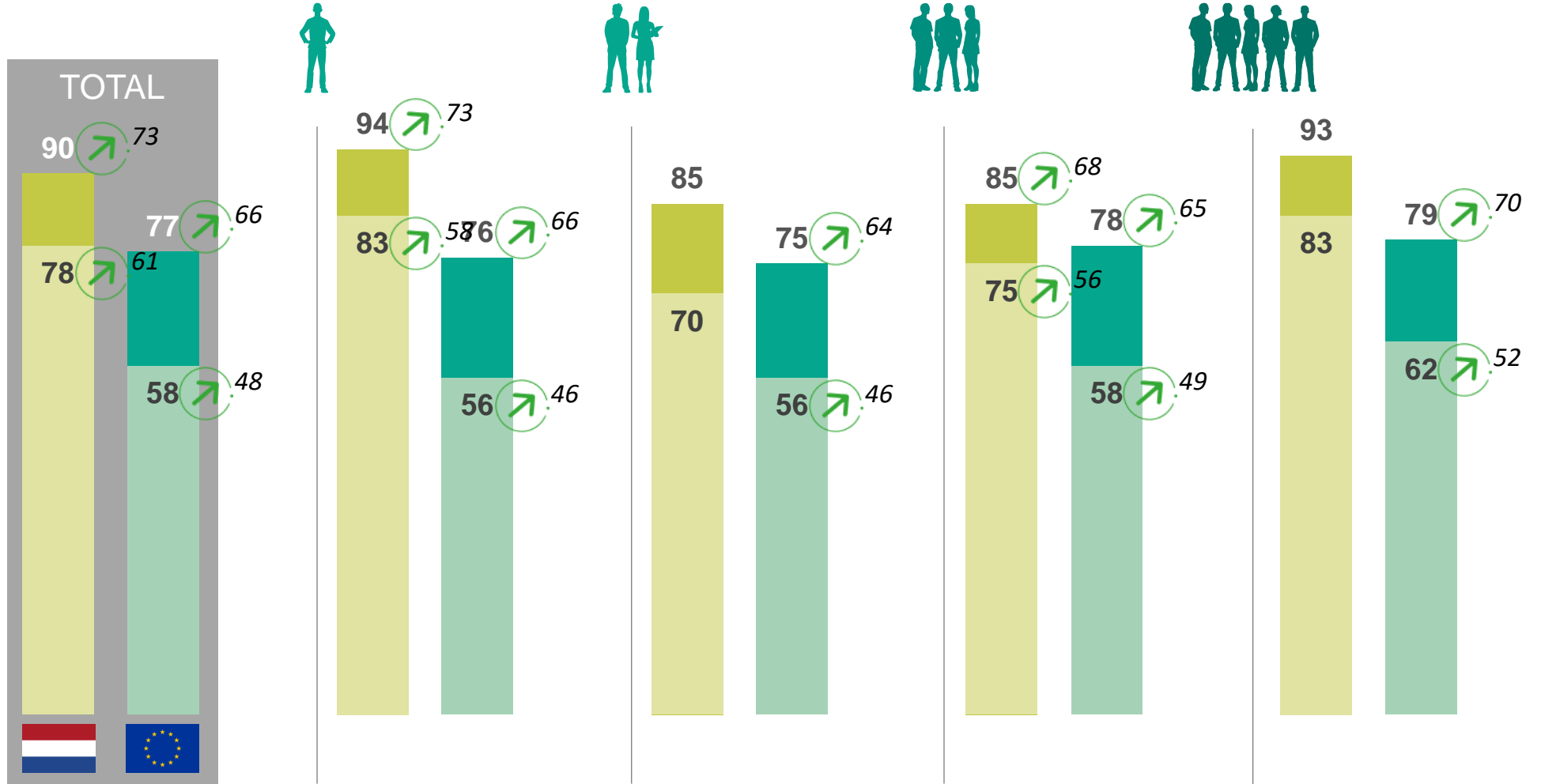
  
Passenger cars



ALREADY  
USING OR  
CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING



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

# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years

In %



Passenger cars



ALREADY USING OR  
CONSIDER USING IN  
THE NEXT 3 YEARS



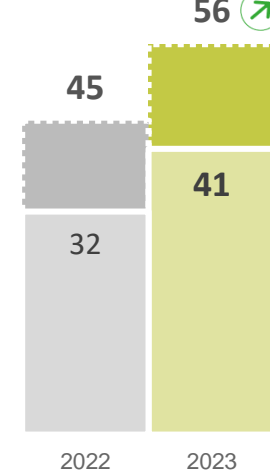
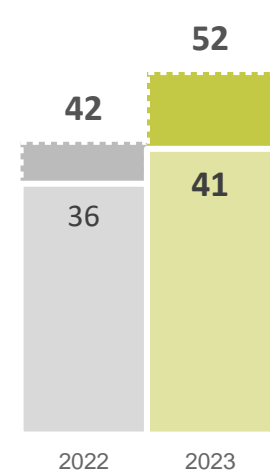
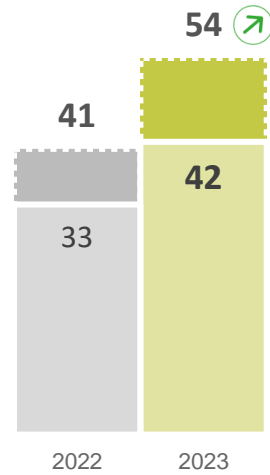
ALREADY  
USING



Plug-in Hybrid

Hybrid

100% Battery  
Electric Vehicle



37 44 ↗  
24 29 ↗

38 44 ↗  
26 29 ↗

34 40 ↗  
19 24 ↗

# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

## Passenger car fleet

In %



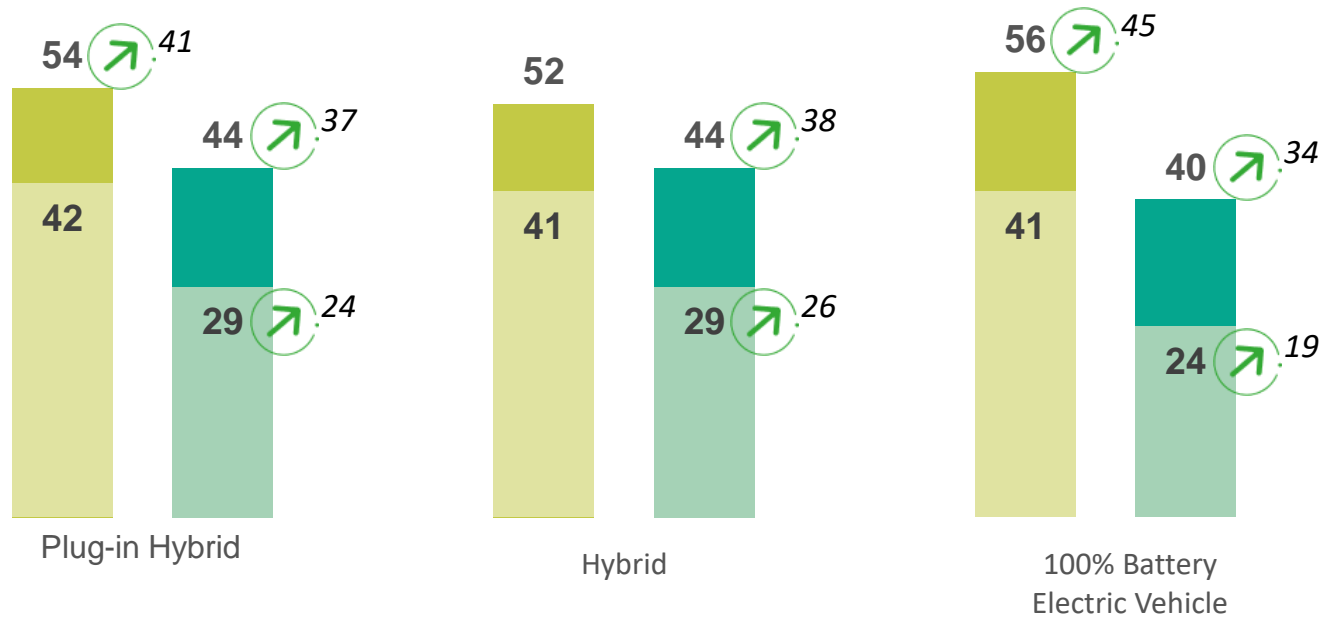
Passenger cars



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING



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

# 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 passenger cars



# CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

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

In %



LCVs

## HOW TO READ THE RESULTS ?

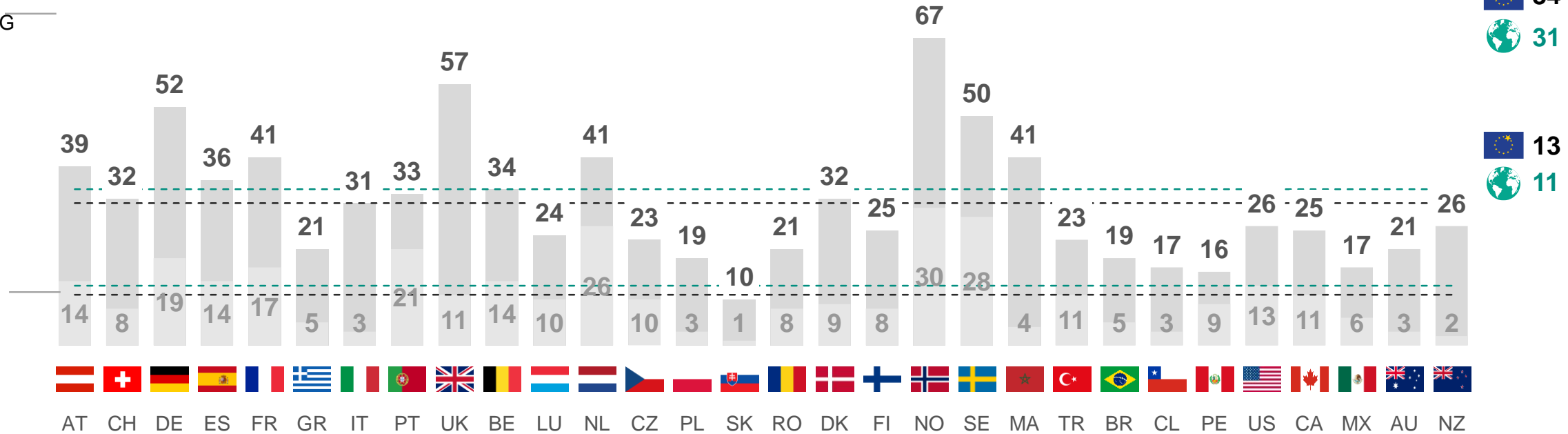
In Netherlands, 41% of the companies are already using or consider to implement at least one alternative technology in the next 3 years. 26% of the companies is currently using at least one.



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING



EU 34

World 31

EU 13

World 11

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

# CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

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

In %



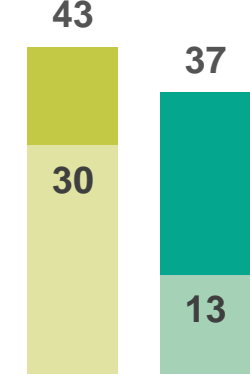
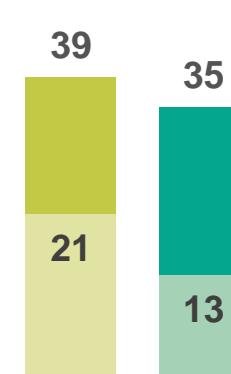
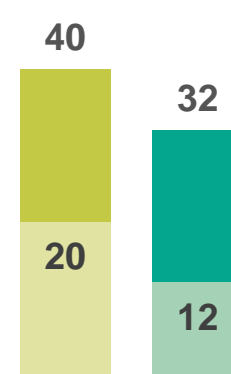
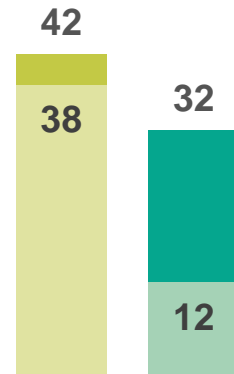
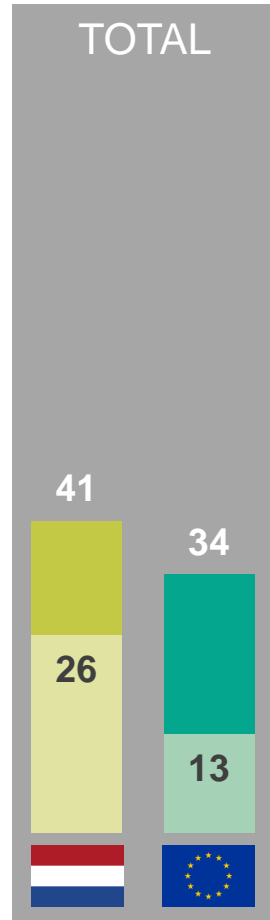
LCVs



ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS



ALREADY USING



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

# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years

In %



LCVs

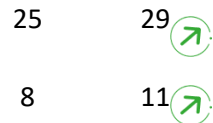
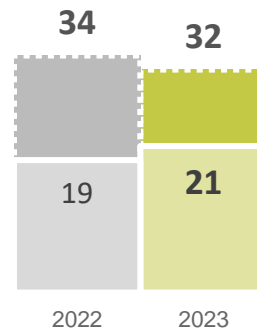
100% Battery  
Electric Vehicle



ALREADY USING OR  
CONSIDER USING IN  
THE NEXT 3 YEARS



ALREADY  
USING



# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY\*

## LCV Fleet

In %



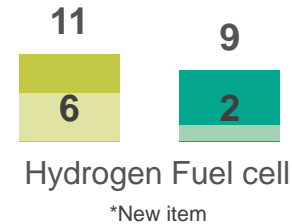
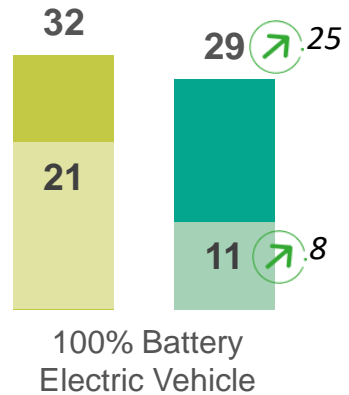
LCVs



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
IMPLEMENTED



# REASONS FOR IMPLEMENTING OR CONSIDERING ALTERNATIVE FUEL TECHNOLOGIES

LCV fleet

In %



LCVs

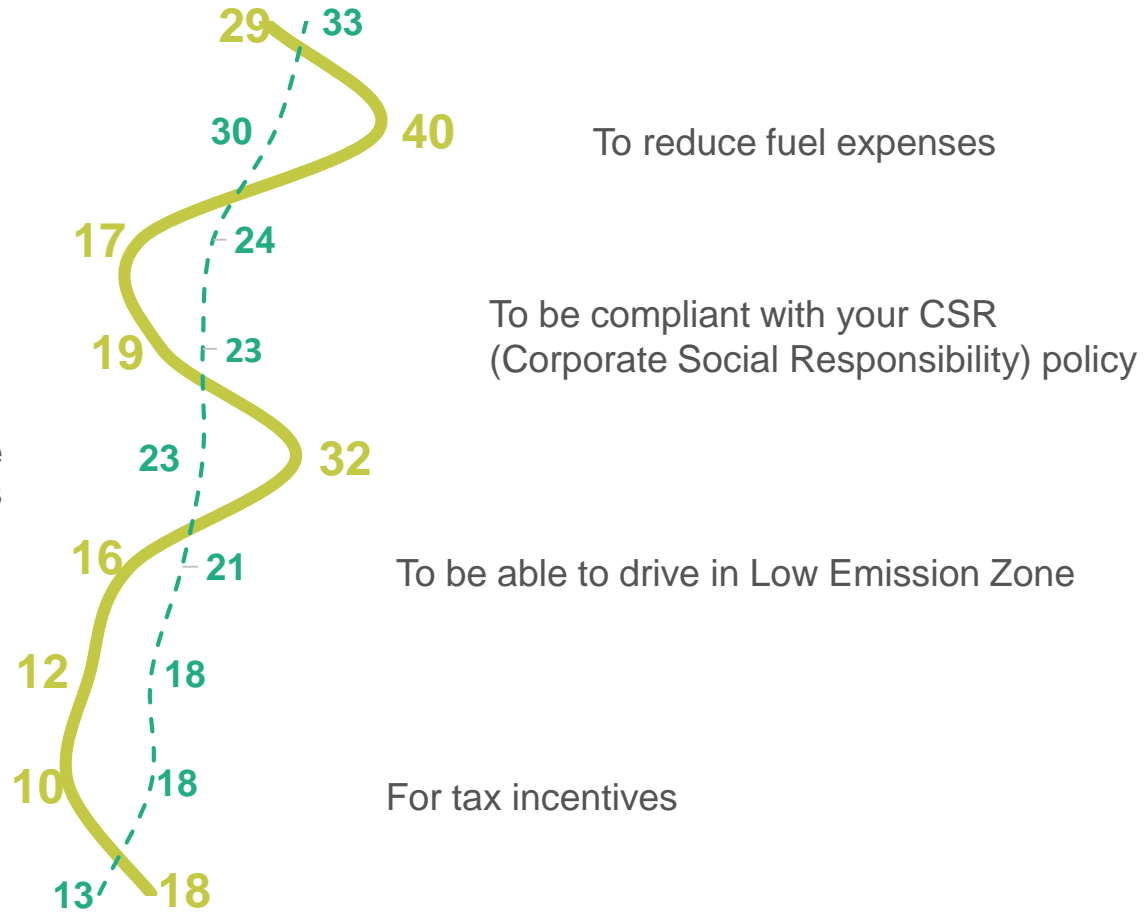
Because of their lower environmental impact

To improve your company image

Because their total cost of ownership is in line with or lower than petrol or diesel alternatives

To anticipate future restrictive public policies

To fulfil your employees' requests



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

# EXPECTED FLEET SHARE PER ENERGY

## HOW TO READ THE RESULTS ?

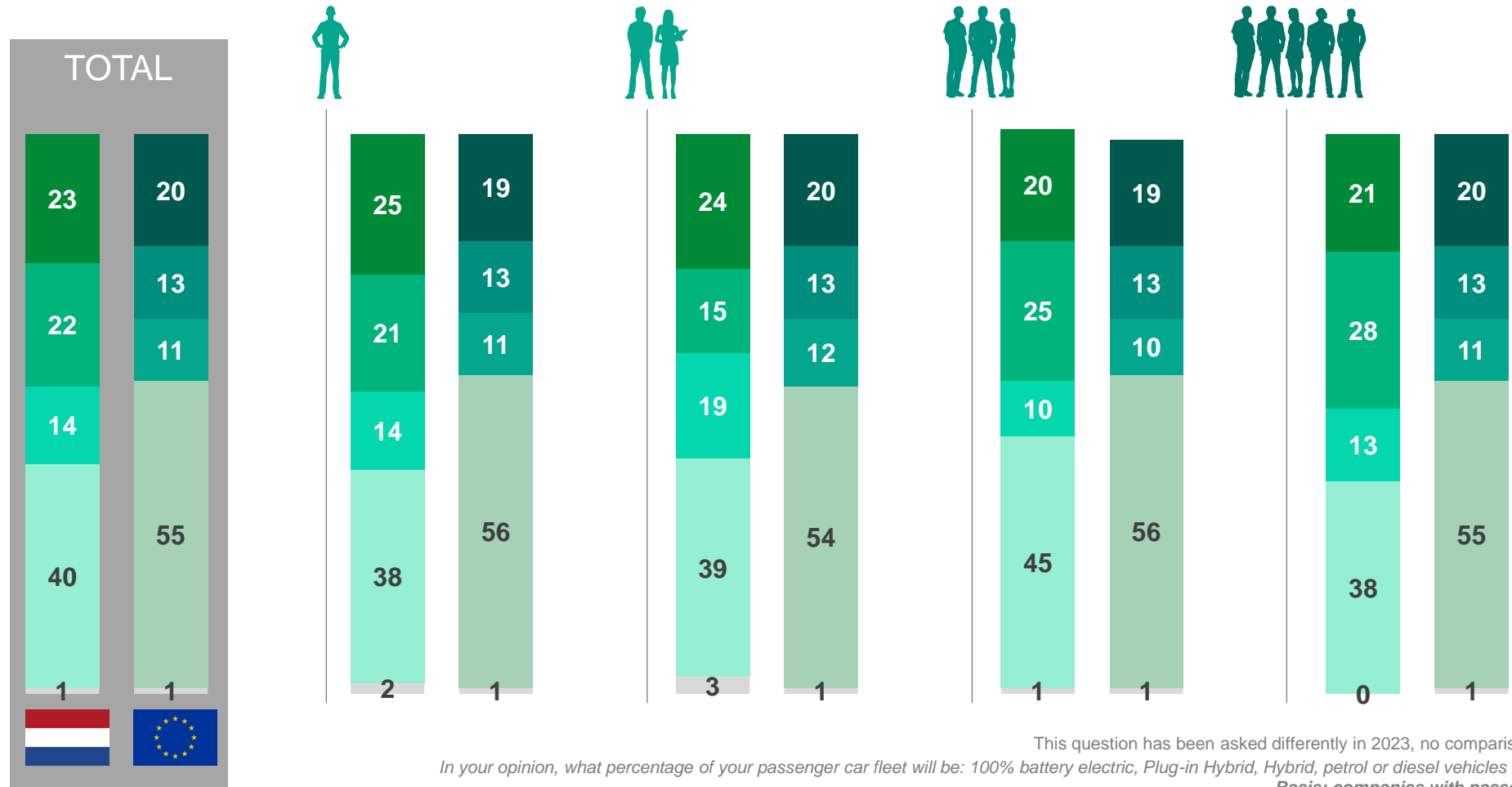
In Netherlands in 3 years, 23% of the companies passenger car fleet will be BEV.

In %



Passenger cars

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



This question has been asked differently in 2023, no comparison vs 2022

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

# EXPECTED FLEET SHARE PER ENERGY

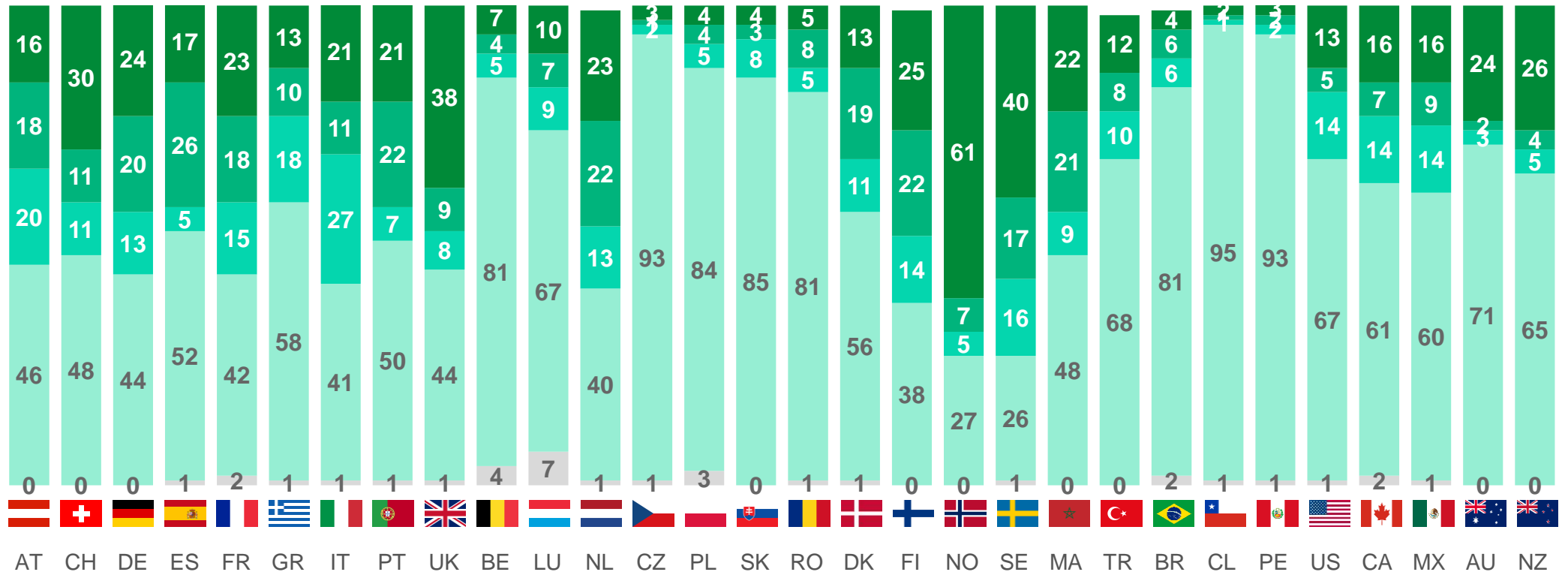
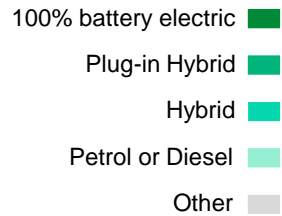
## HOW TO READ THE RESULTS ?

In Netherlands in 3 years, 23% of the companies passenger car fleet will be BEV.

In %



Passenger cars



This question has been asked differently in 2023, no comparison vs 2022

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

Basis: companies with passenger cars

# EXPECTED FLEET SHARE PER ENERGY

In %

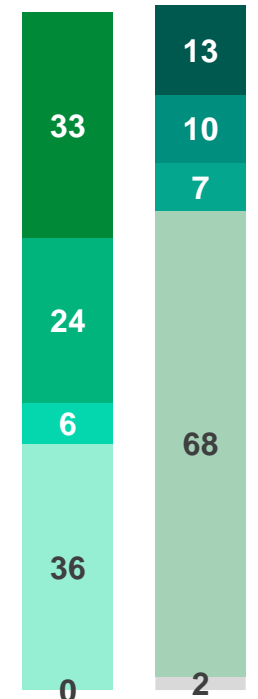
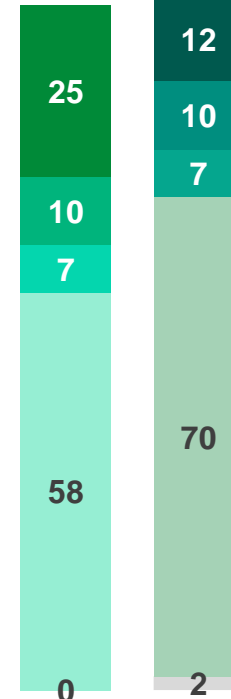
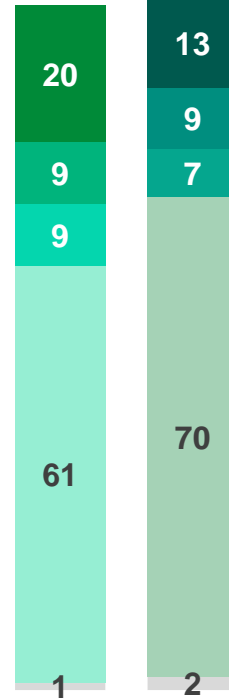
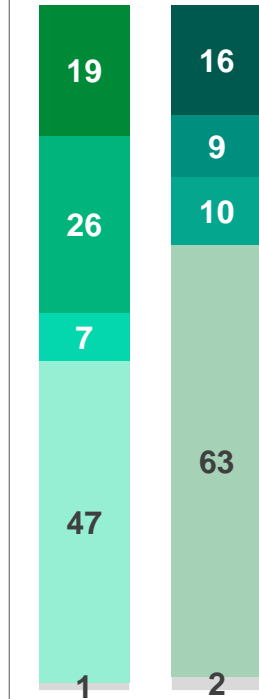
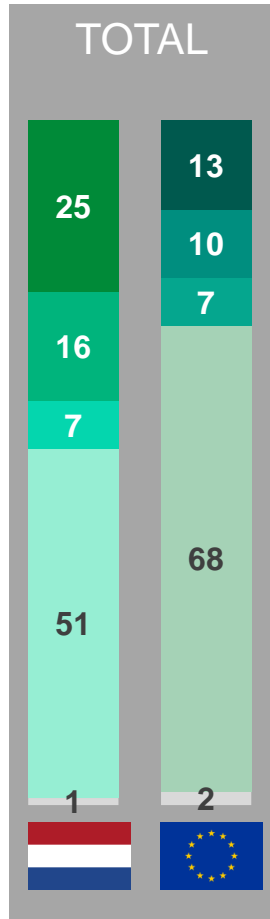


LCVs

## HOW TO READ THE RESULTS ?

In Netherlands in 3 years, 25% of the companies LCV fleet will be BEV.

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



This question has been asked differently in 2023, no comparison vs 2022

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



# EXPECTED FLEET SHARE PER ENERGY

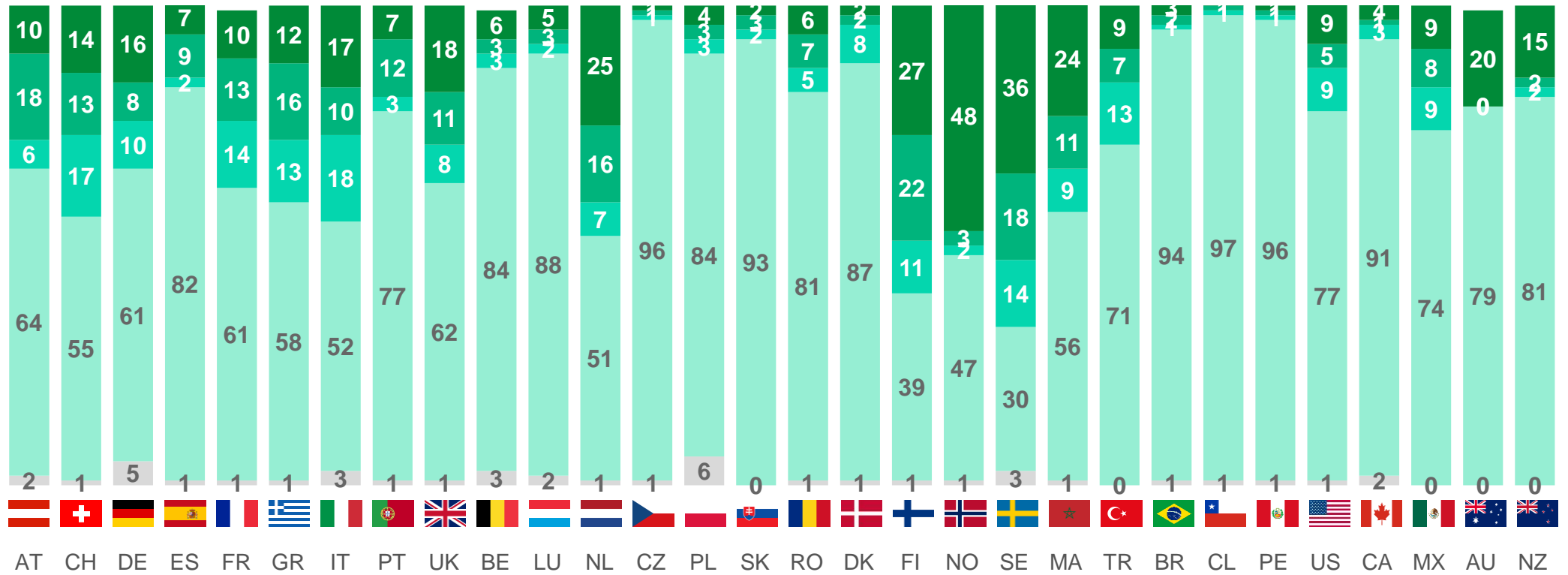
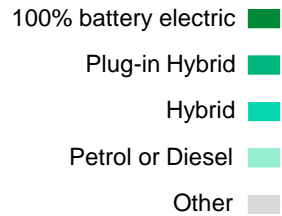
## HOW TO READ THE RESULTS ?

In Netherlands in 3 years, 25% of the companies LCV fleet will be BEV.

In %



LCVs



This question has been asked differently in 2023, no comparison vs 2022

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

Basis: companies with LCVs

5

# ENERGY MIX FOCUS PER ALTERNATIVE TECHNOLOGY



# HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %



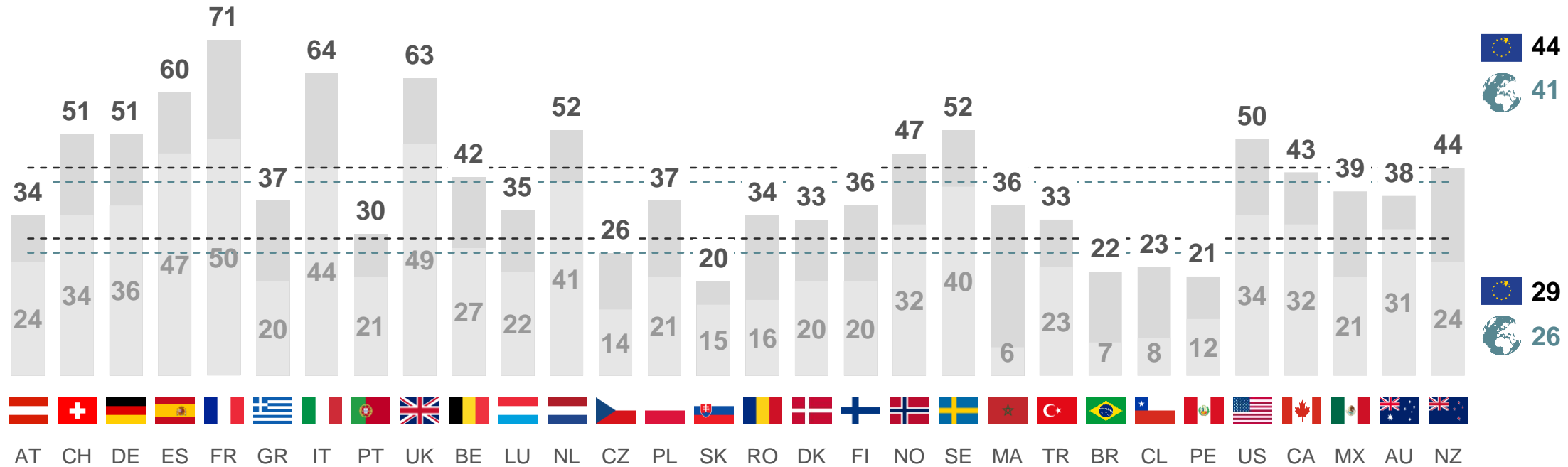
Passenger cars



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



EU 44

World 41

EU 29

World 26

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 %



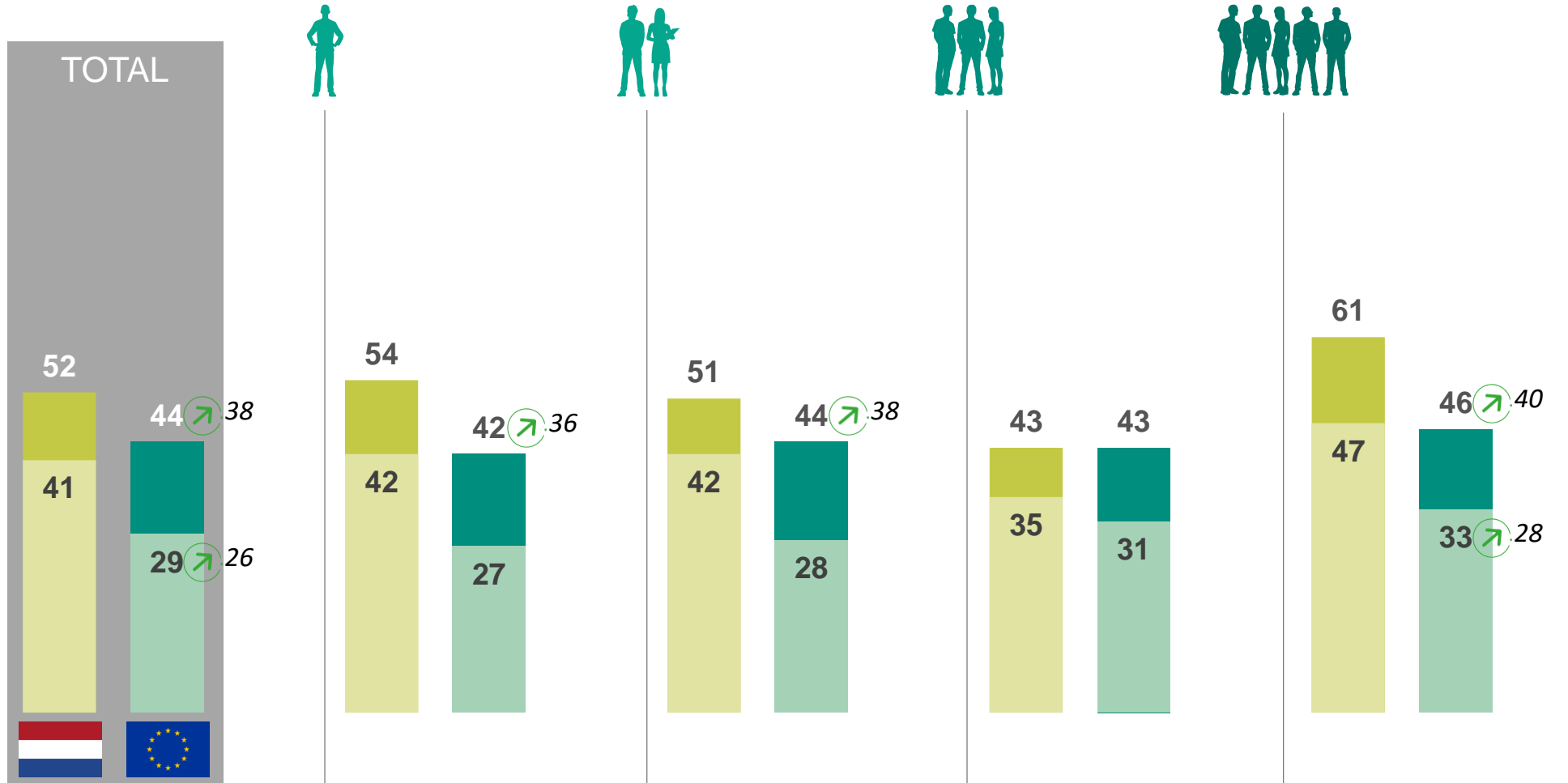
Passenger cars



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING



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

**Basis: companies with passenger cars**

# PLUG-IN HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %



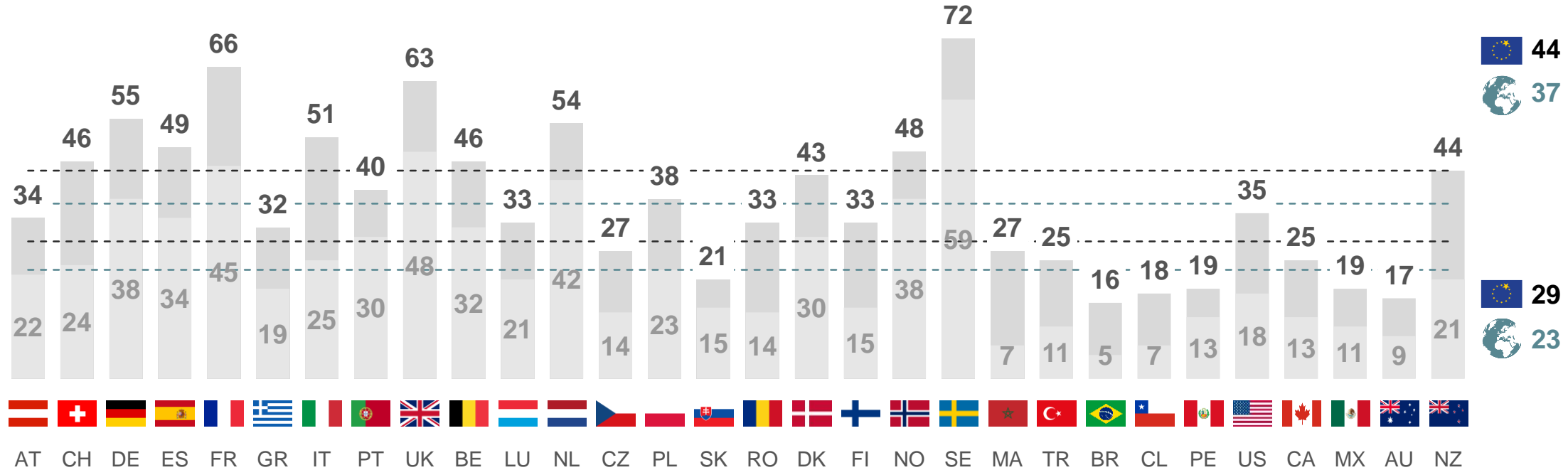
Passenger cars



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING




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

**Basis: companies with passenger cars**

# PLUG-IN HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %

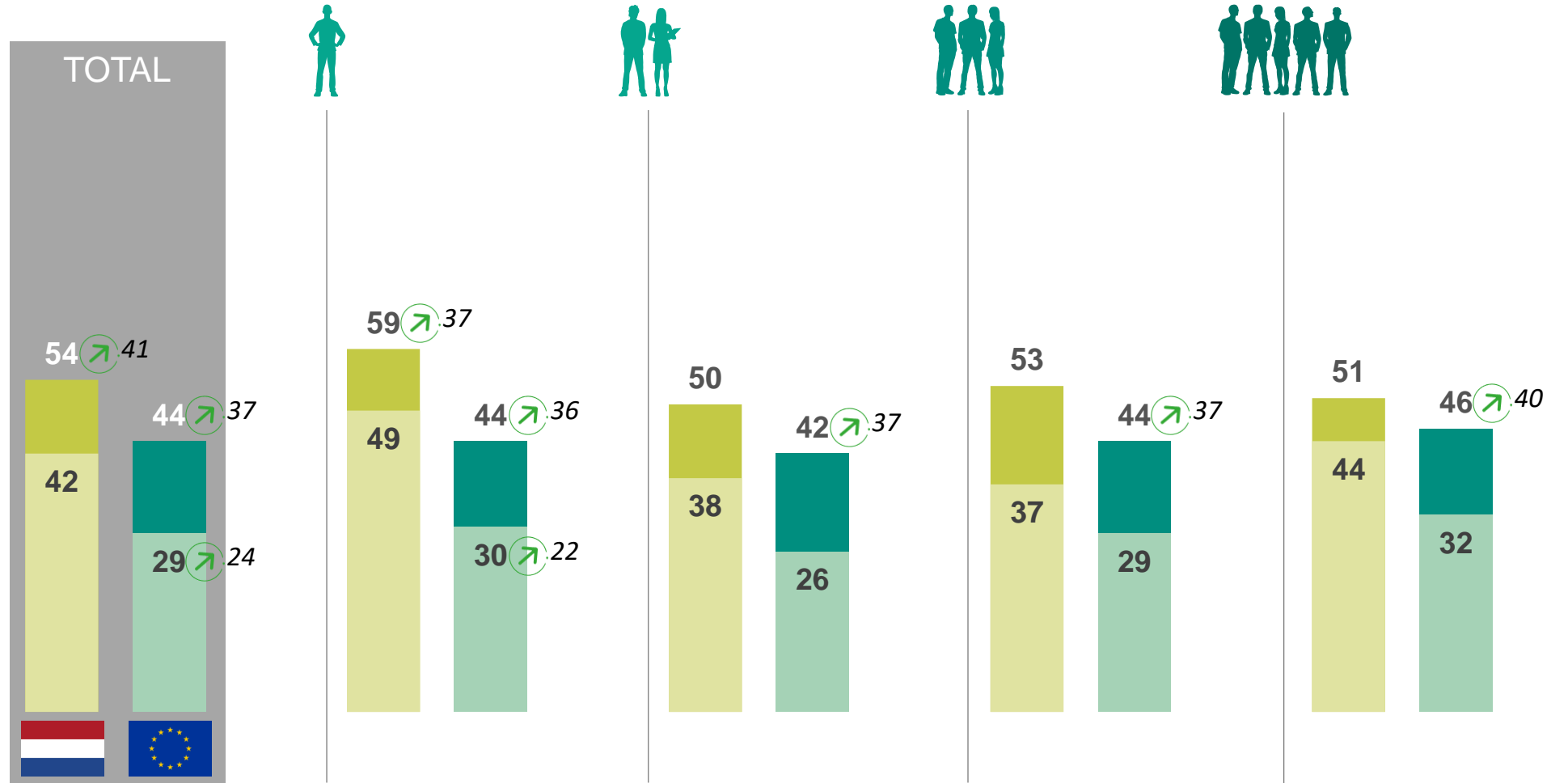
  
Passenger cars



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING



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 %



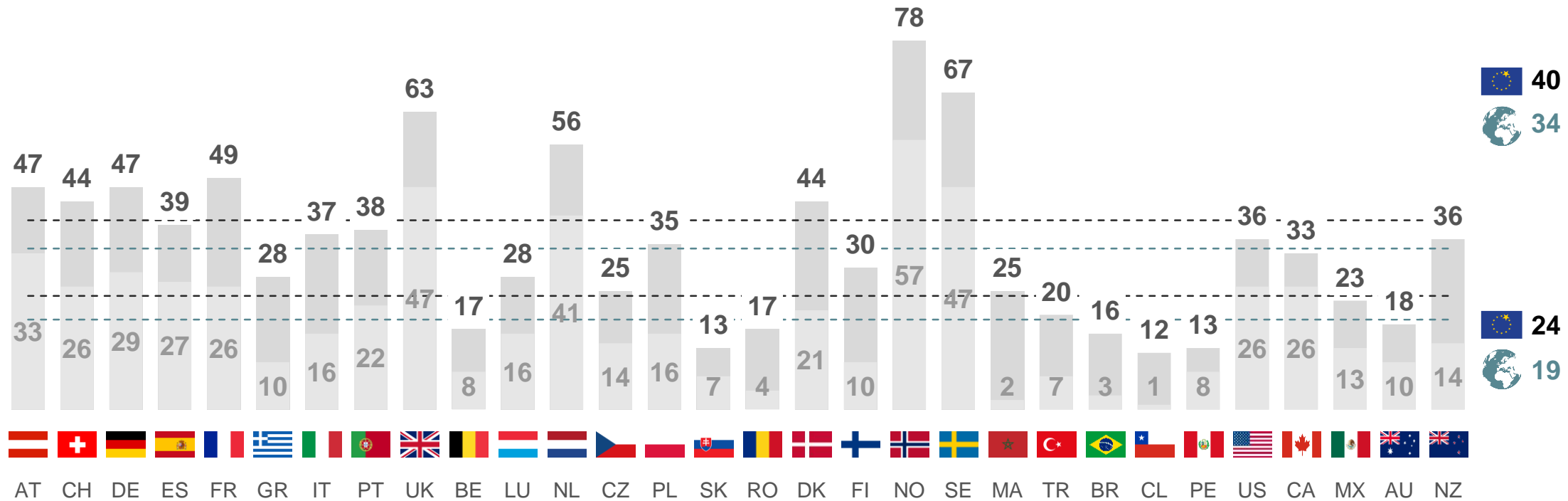
Passenger cars



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



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

**Basis: companies with passenger cars**

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

In %

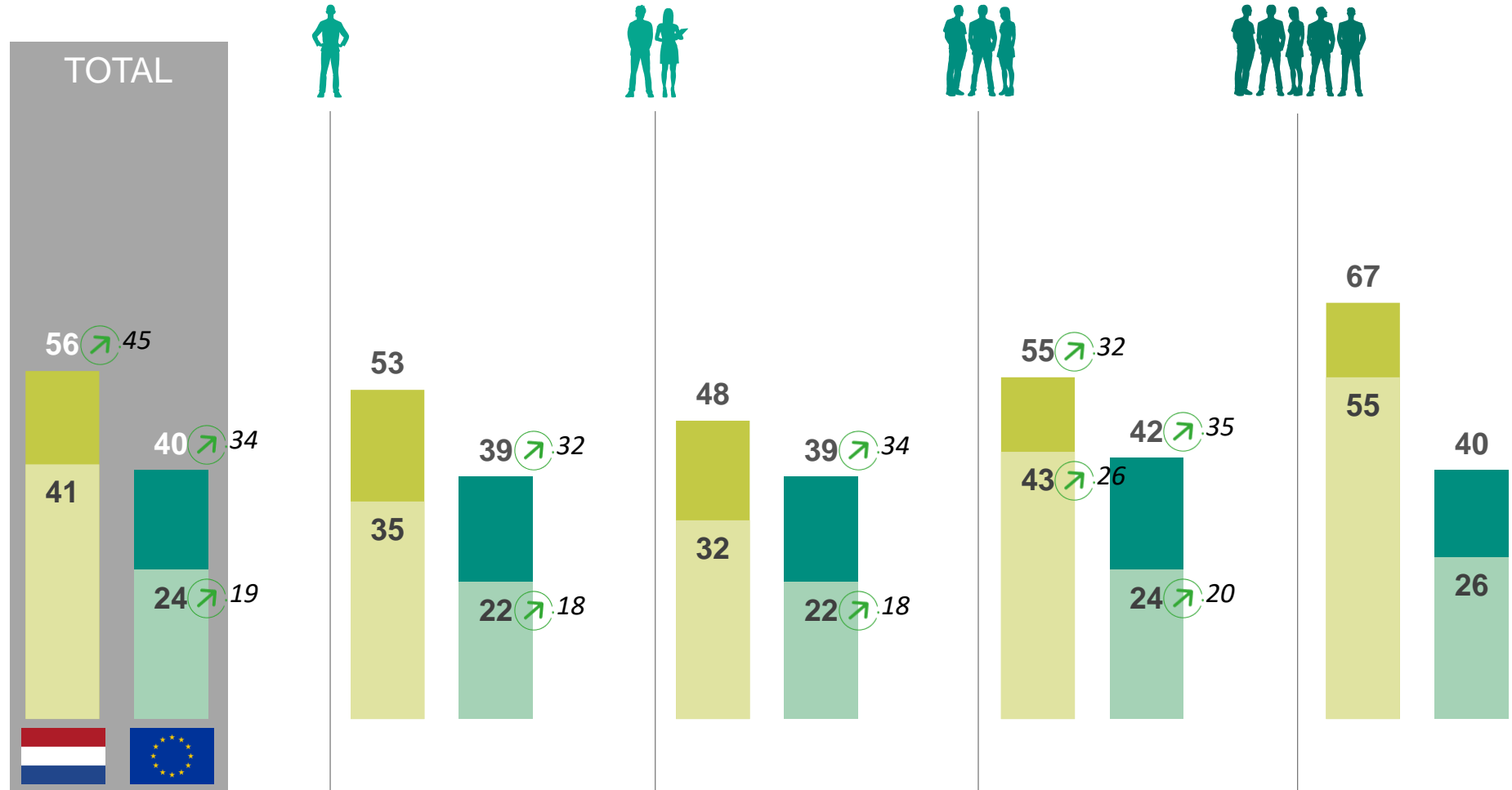
Passenger cars



ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS



ALREADY USING



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



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

In %



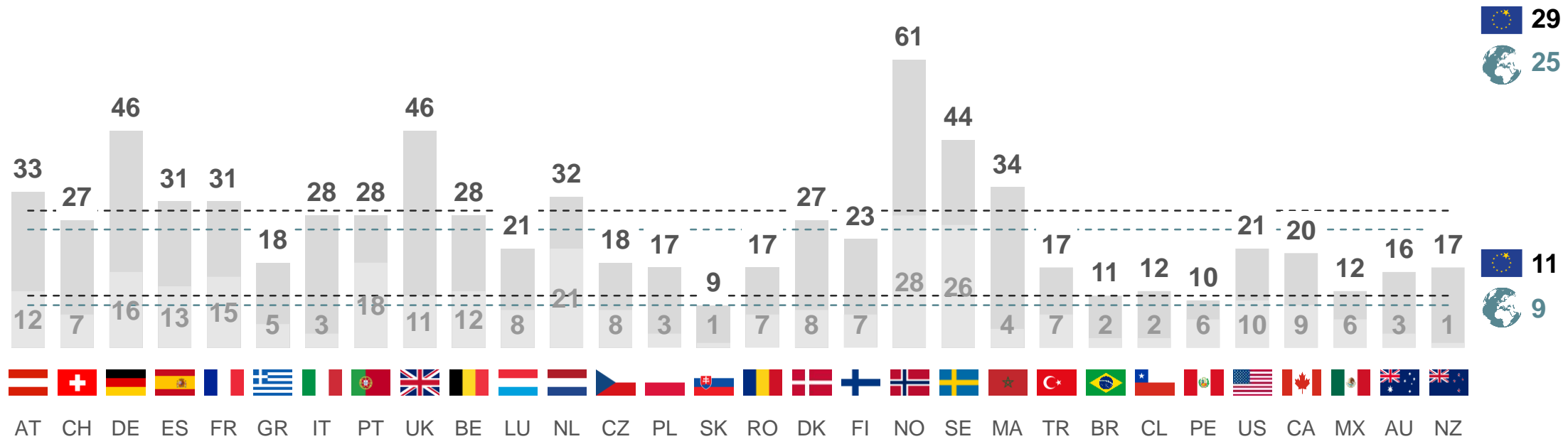
LCVs



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



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

Basis: companies with LCVs

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

In %



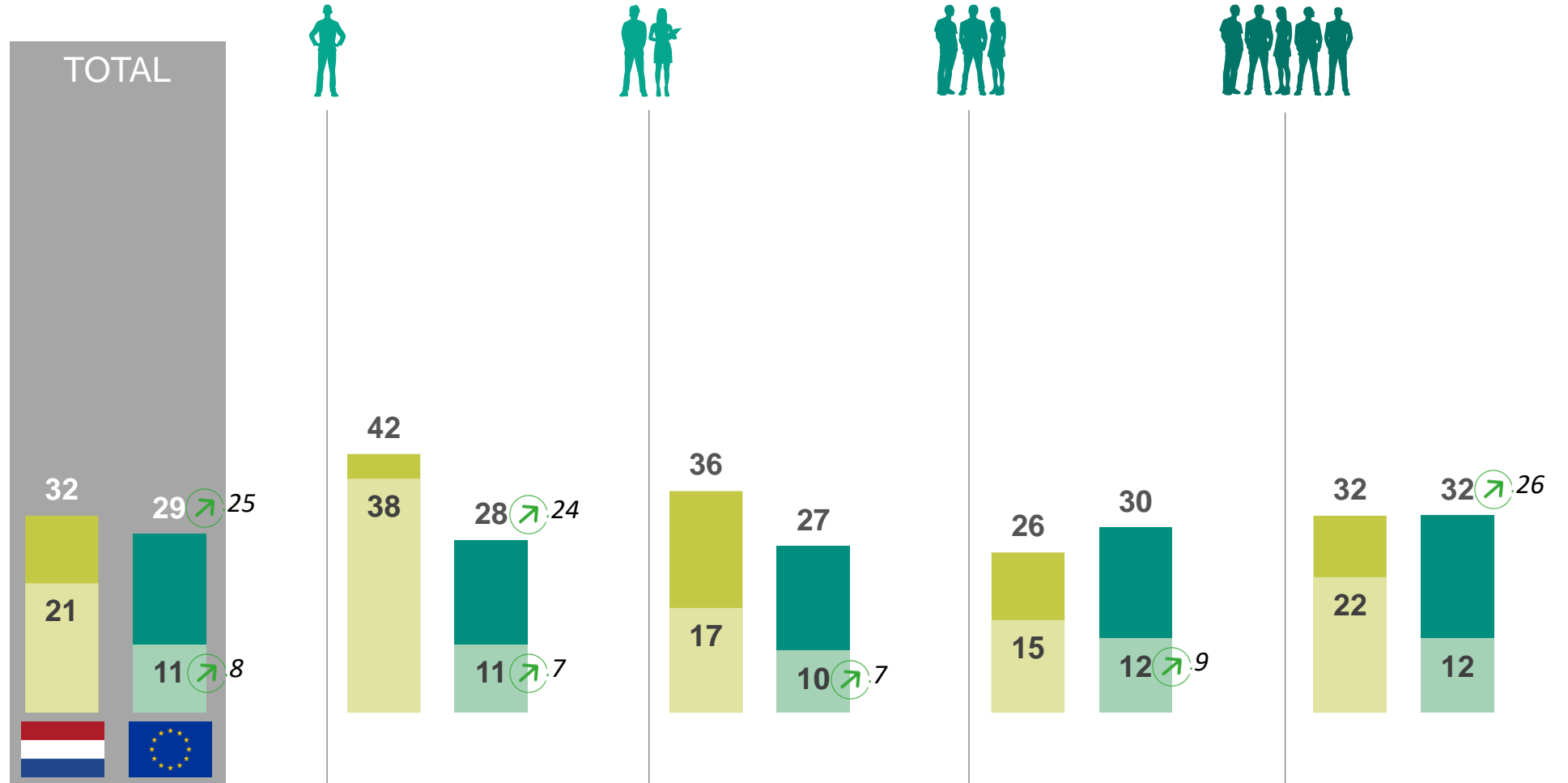
LCVs



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING



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

**Basis: companies with LCVs**

# HYDROGEN FUEL CELL ELECTRIC VEHICLE : IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %



LCVs



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS

9

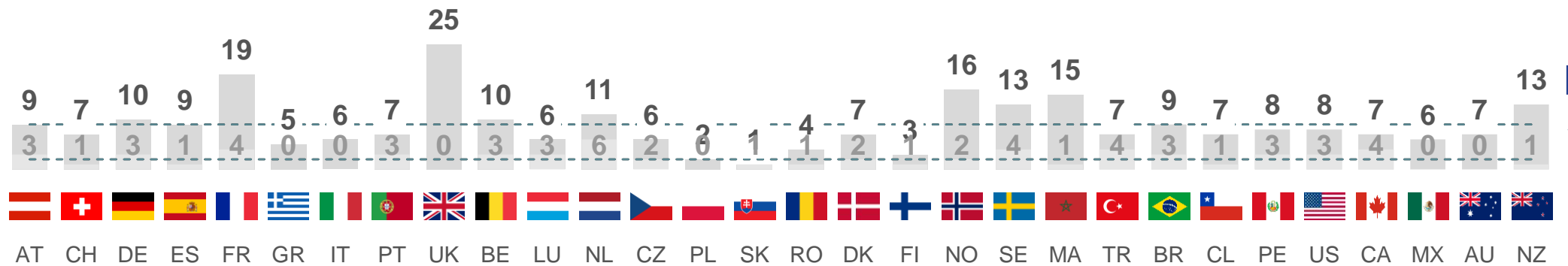
9



ALREADY  
USING

2

2



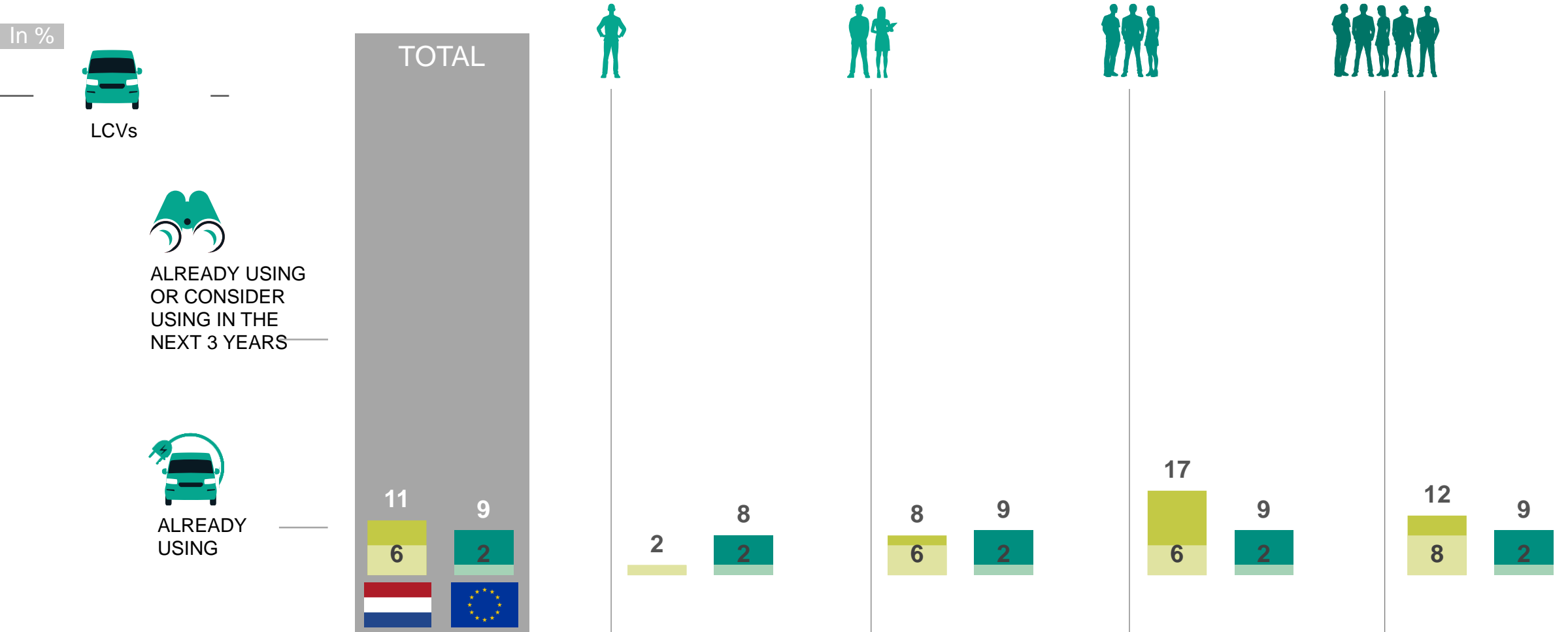
New item added in 2023

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

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

Basis: companies with LCVs

# HYDROGEN FUEL CELL ELECTRIC VEHICLE : IMPLEMENTATION WITHIN COMPANY FLEET POLICY



New item added in 2023

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

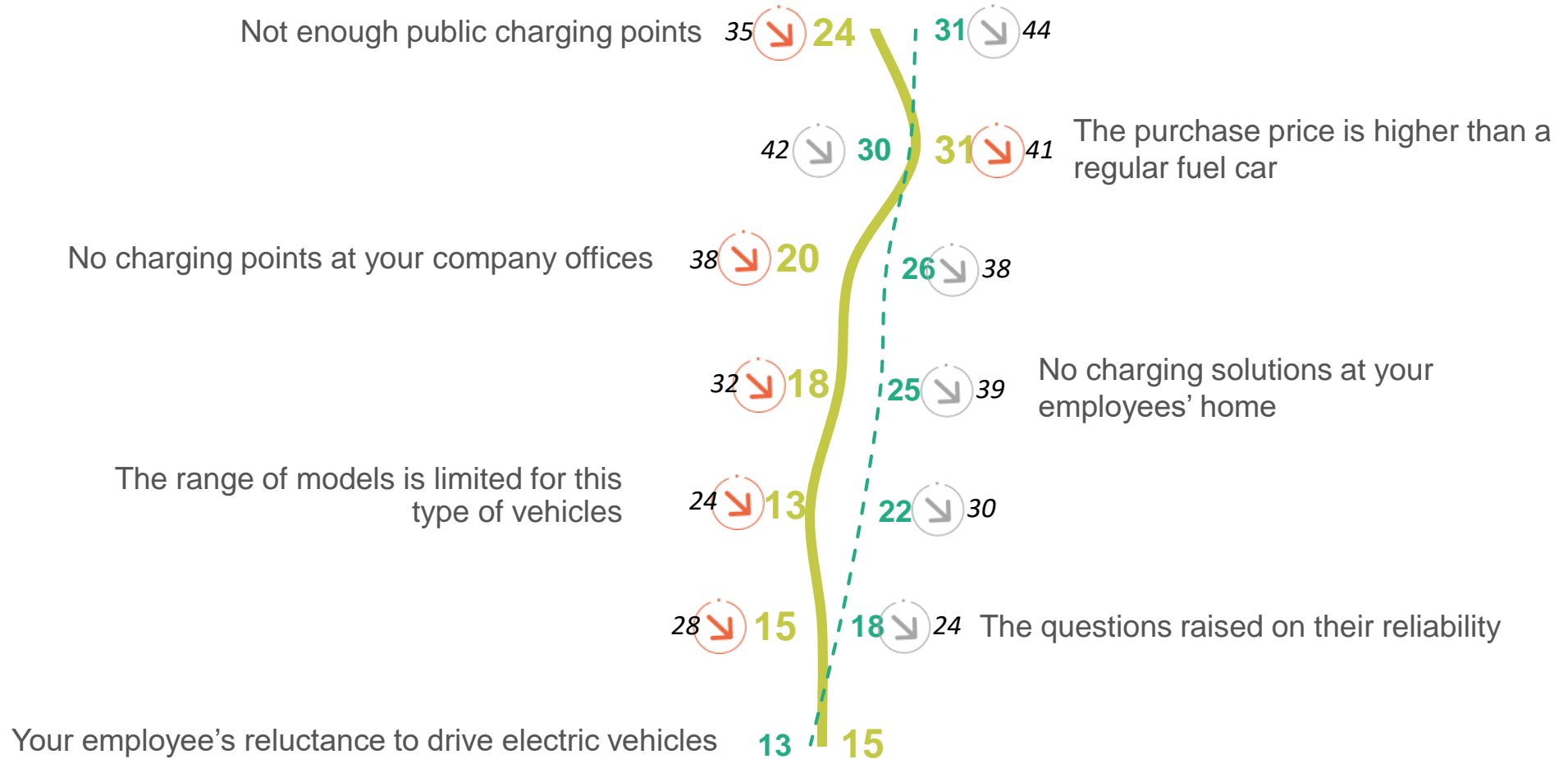
Basis: companies with LCVs

# CONSTRAINTS OF 100% BATTERY ELECTRIC VEHICLE USAGE

In %



Passenger cars + LCVs



What are the constraints of using 100% Battery Electric vehicles?  
 Basis: Know 100% BEV technology

# CONSTRAINTS OF 100% BATTERY ELECTRIC VEHICLE USAGE

In %



Passenger cars + LCVs

do not consider implementing battery electric vehicles



21

39

44

The purchase price is higher than a regular fuel car



No charging points at your company offices



The range of models is limited for this type of vehicles



Your employee's reluctance to drive electric vehicles



Not enough public charging points



No charging solutions at your employees' home



23

31

18

25

12

15

The questions raised on their reliability

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

# ACCESS TO CHARGING POINTS

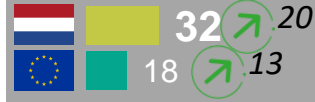
In %



Passenger cars + LCVs

TOTAL

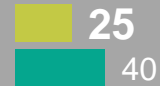
Company subsidises cost of home installations of charging points for drivers



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



Currently no charging points installed at the company premises



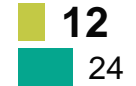
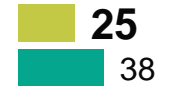
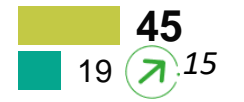
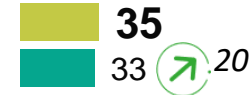
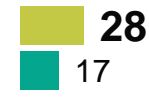
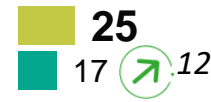
Charging points installed at the company premises and free charging for drivers



Drivers have to pay for home installation of charging points



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



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

In terms of charging point installation and responsibility for the cost of charging for battery electric and plug-in hybrid vehicles in your company...?

Basis: companies already using or considering BEV/PHEV for passenger cars or BEV for LCV

No comparison with 2022 because of a change of basis. 71

6

# WHAT ARE THE PERSPECTIVES IN TERMS OF MOBILITY SOLUTIONS?





# A STRONG IMPLEMENTATION OF MOBILITY SOLUTIONS

*To note : in 2023 only respondents were interrogated that are aware of mobility solutions, which means almost 89% of overall population (no impact on the representativity of the results). 40% of the respondents were managing directors. And a new mobility solution was tested "car or cash allowance", allowing no comparison of mobility solutions implementation vs 2022.*

1

● **Mobility solutions are more implemented in Dutch companies** than in the rest of Europe : 8 out of 10 companies have already implemented at least one solution (vs 72% in Europe on average).

Overall, **Mobility budget (26%), Ride sharing (22%) Bike and Public transport (both 21%) are the most widespread solutions.**

2

● Within large companies, mobility budget is particularly well-established, by almost half of companies, as well as corporate car sharing (to a lesser extent), in contrast to small companies which make little use of both solutions.

**A third of companies plan to facilitate the use of these modes of transportation thanks to a dedicated platform, a tool that is all the more considered in the large companies.**

3

● **Almost 4 out of 10 companies are interested in offering employees a mobility budget, driven by the possibility to reduce mobility costs and the will to offer more options and flexibility to employees.**

4

● This year, small companies are the most likely to offer this kind of budget.

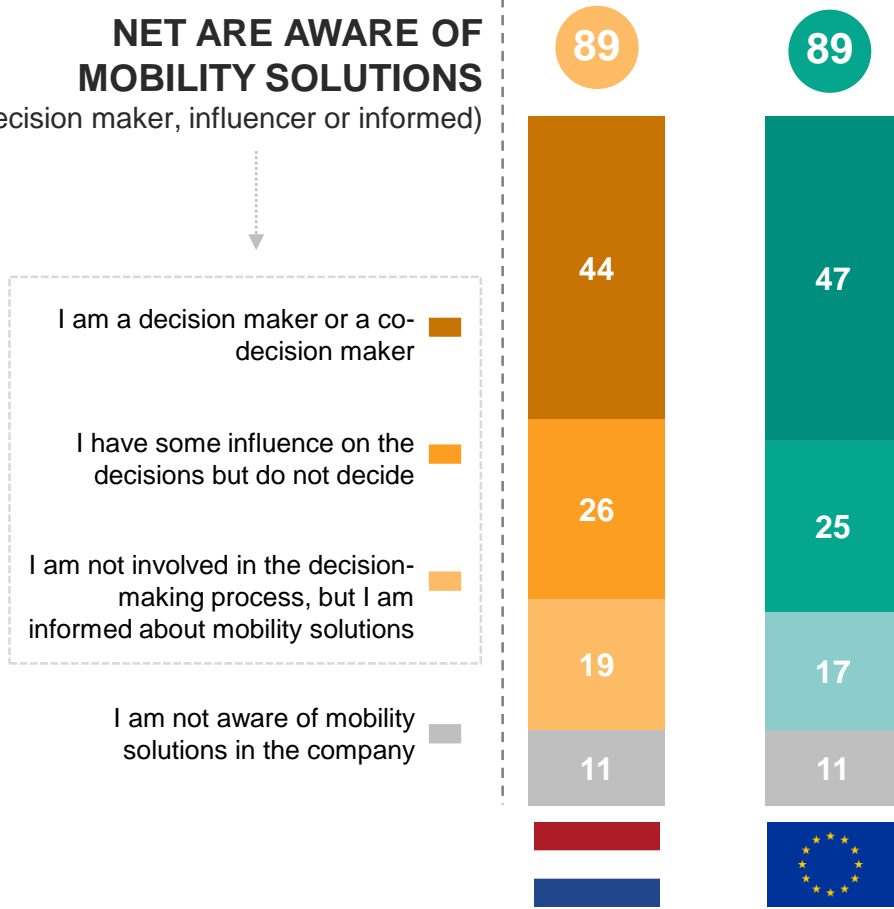
Lastly, **more Dutch companies consider a specific strategy on the mobility CO2 footprint, especially among the smallest companies.**

# MOBILITY SOLUTION DECISION MAKERS

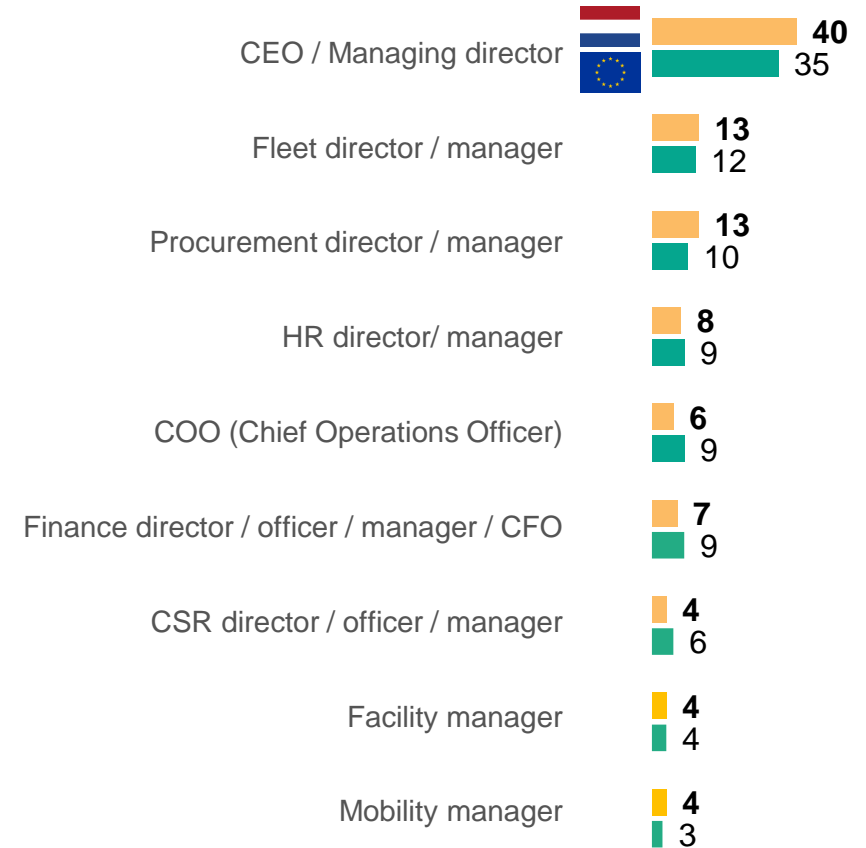
## RESPONDENTS INVOLVEMENT IN MOBILITY SOLUTION DECISIONS

### NET ARE AWARE OF MOBILITY SOLUTIONS

(Decision maker, influencer or informed)



## POSITION OF THE PERSON WHO DECIDES ON MOBILITY SOLUTIONS



# RESPONDENTS INVOLVEMENT IN MOBILITY SOLUTION DECISIONS

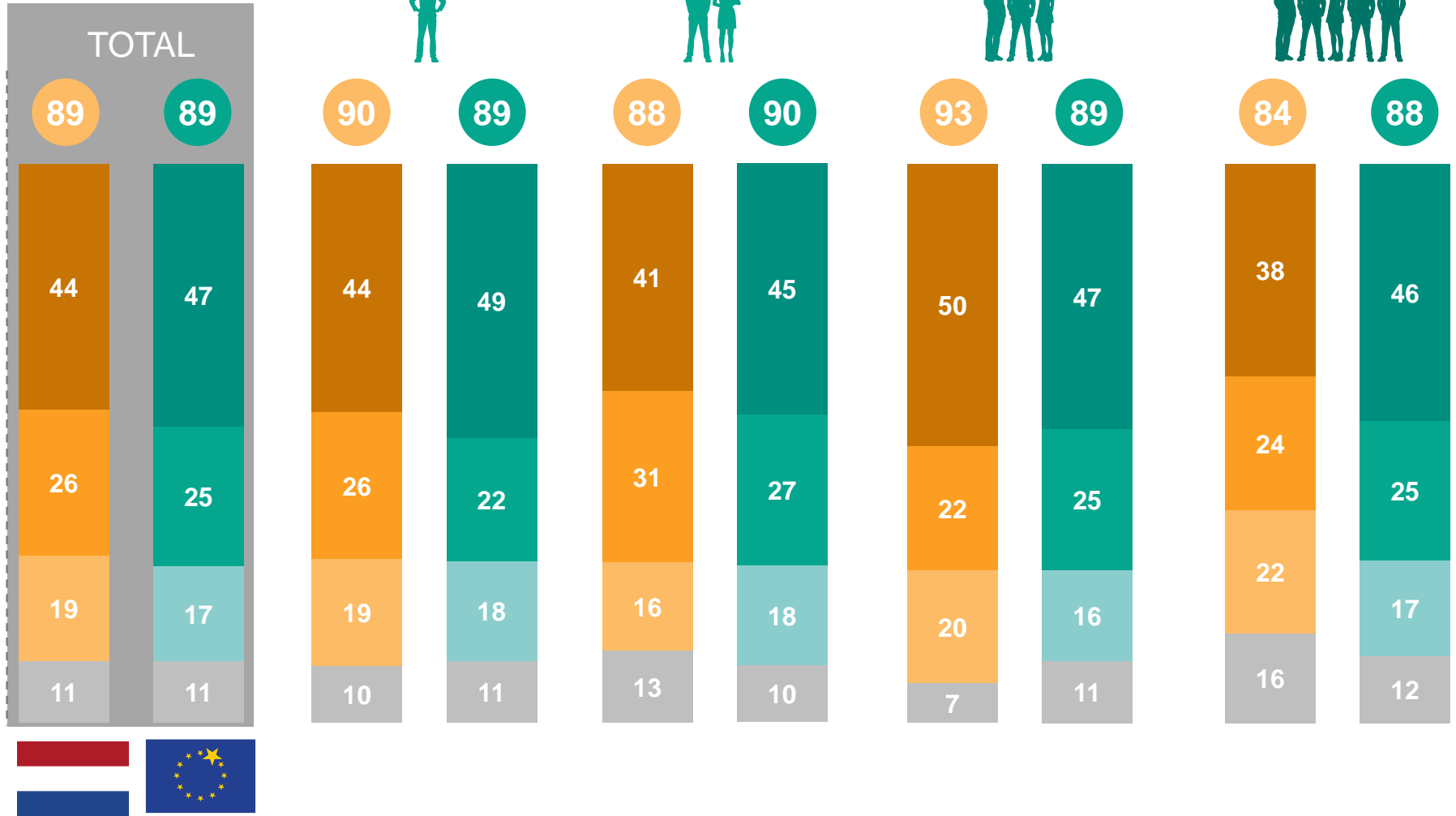
In %

## NET ARE AWARE OF MOBILITY SOLUTIONS

(Decision maker, influencer or informed)

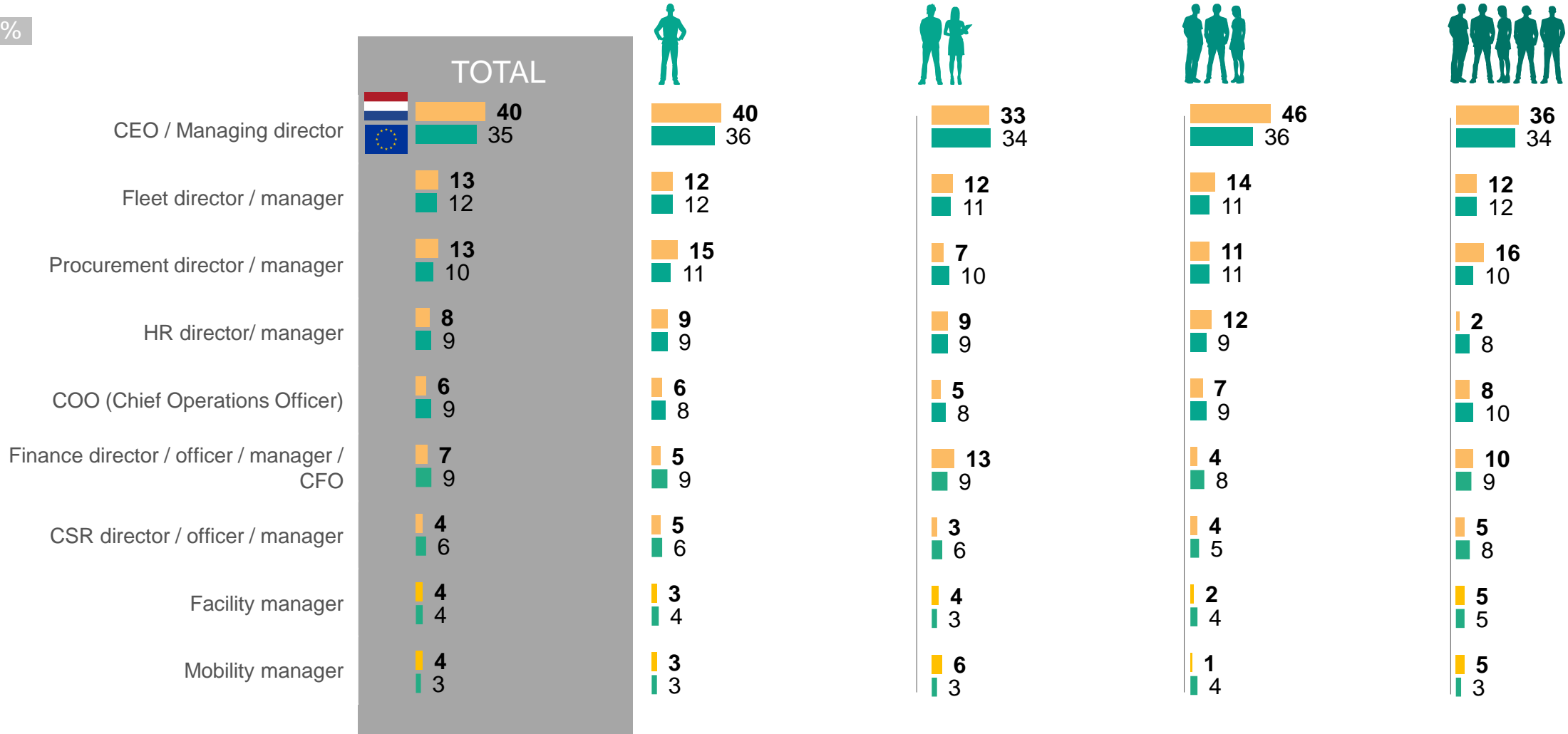


- I am a decision maker or a co-decision maker
- I have some influence on the decisions but do not decide
- I am not involved in the decision-making process, but I am informed about mobility solutions
- I am not aware of mobility solutions in the company



# POSITION OF THE PERSON WHO DECIDES ON MOBILITY SOLUTIONS

In %



New question added in 2023

What is the position of the person who decides on mobility solutions in your company??  
Basis: companies with corporate vehicles = 100%

# MOBILITY SOLUTIONS LIST AND DEFINITIONS



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



**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



**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



**CAR OR CASH ALLOWANCE** \*New item

# MOBILITY SOLUTIONS IMPLEMENTATION

At least one already implemented

In %

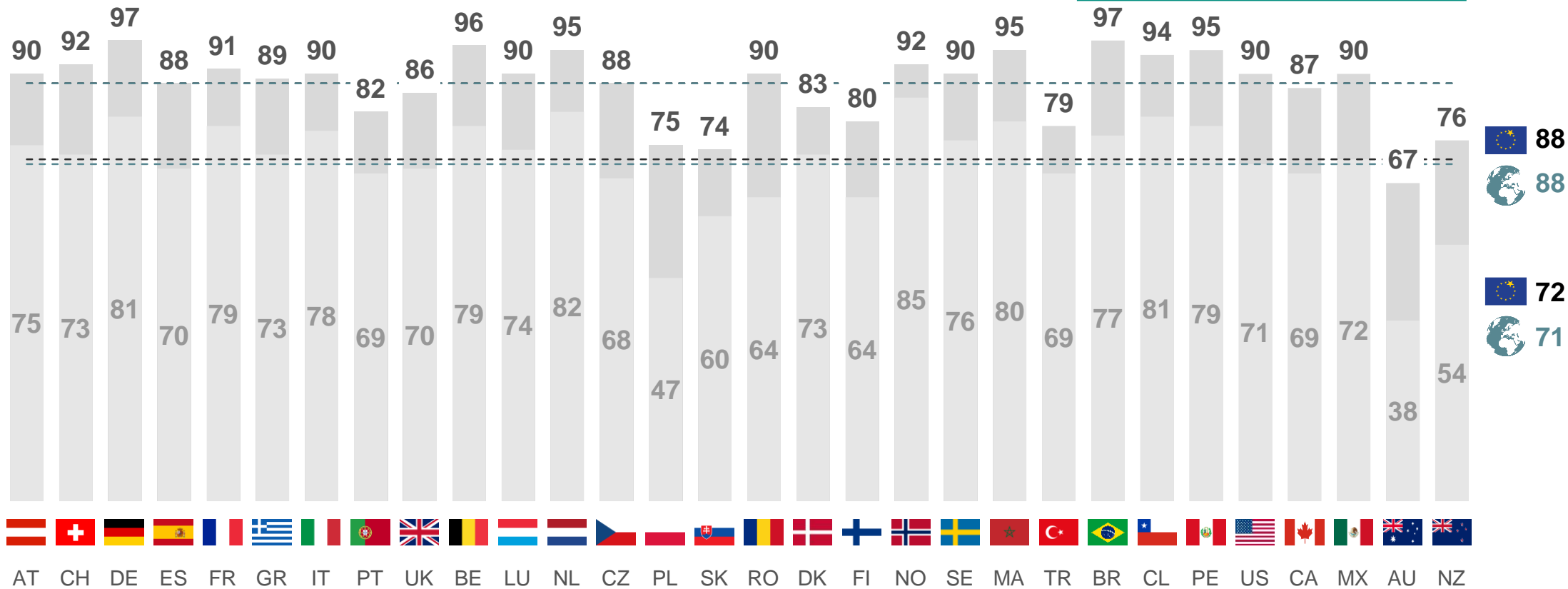


ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING

- List of the alternative mobility solutions:
- CORPORATE CAR SHARING
  - RIDE SHARING
  - BIKE SHARING / BIKE LEASING
  - 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
  - CAR OR CASH ALLOWANCE \*New item



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

# MOBILITY SOLUTIONS IMPLEMENTATION

At least one already implemented (including car or cash allowance)

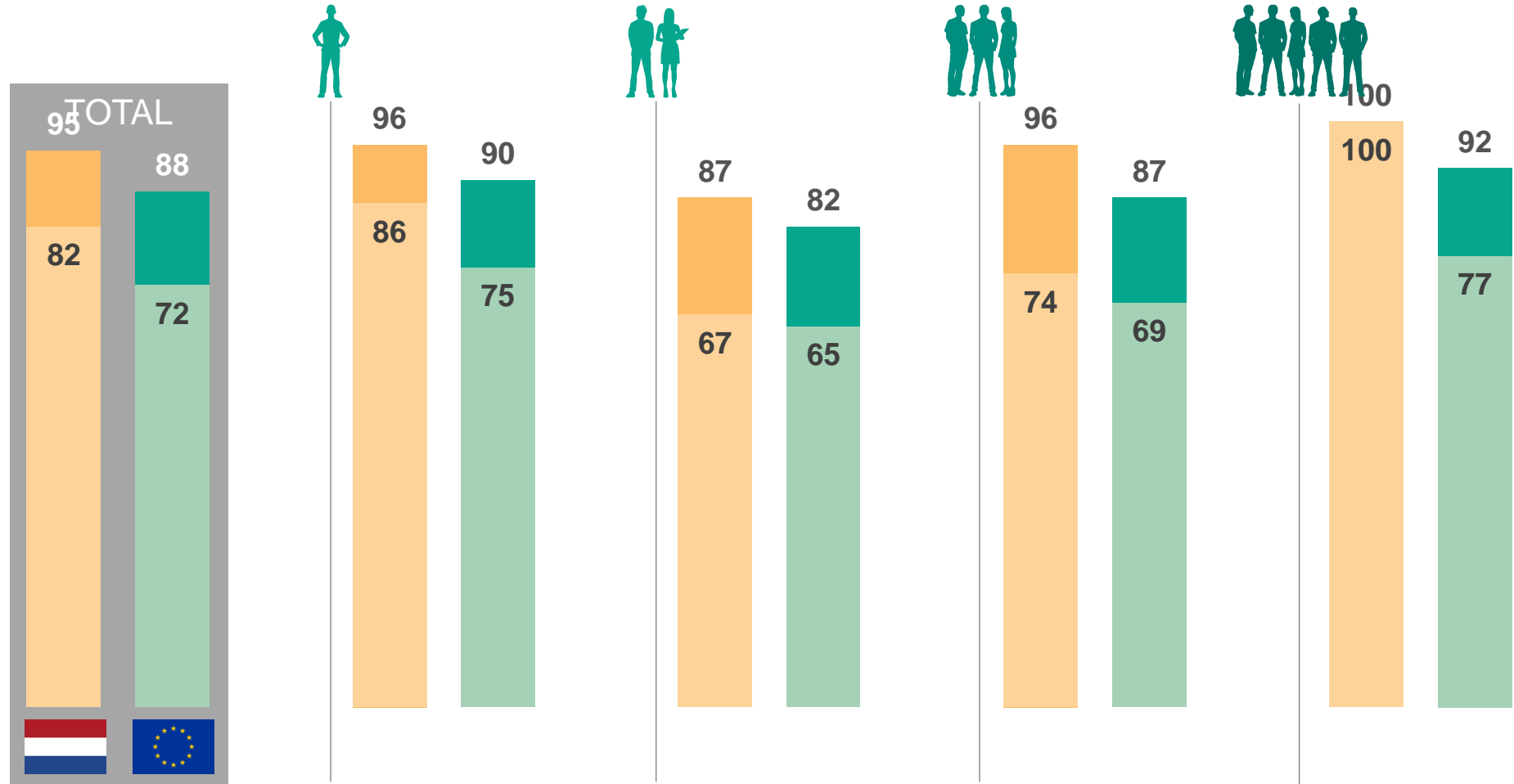
In %



ALREADY USING  
OR CONSIDER IN  
THE 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%

Question asked to respondents that are aware of mobility solutions

# OVERVIEW OF MOBILITY SOLUTIONS IMPLEMENTATION

In %

82%

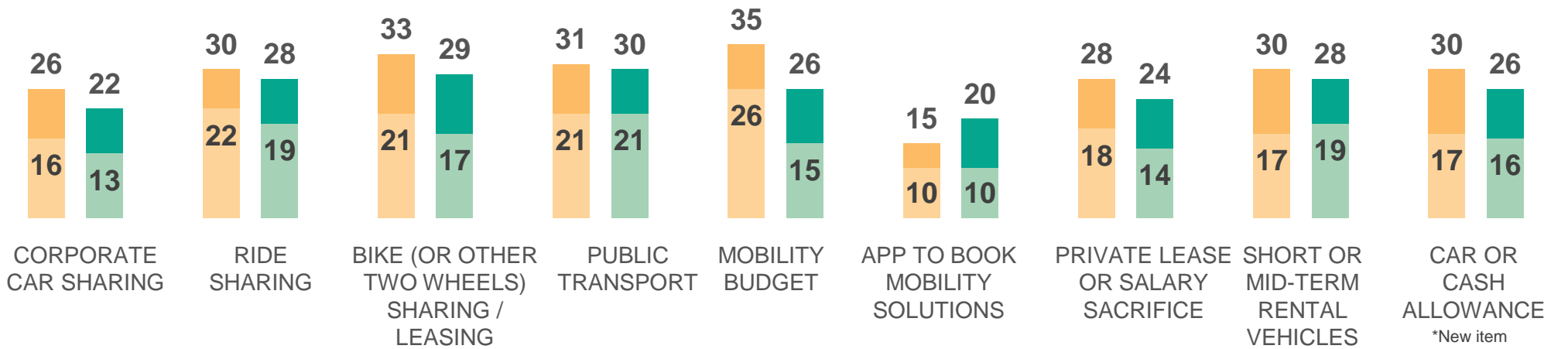
Of companies have already implemented at least one of these solutions



ALREADY USING OR CONSIDER IN THE 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%

Question asked to respondents that are aware of mobility solutions



# CORPORATE CAR SHARING IMPLEMENTATION

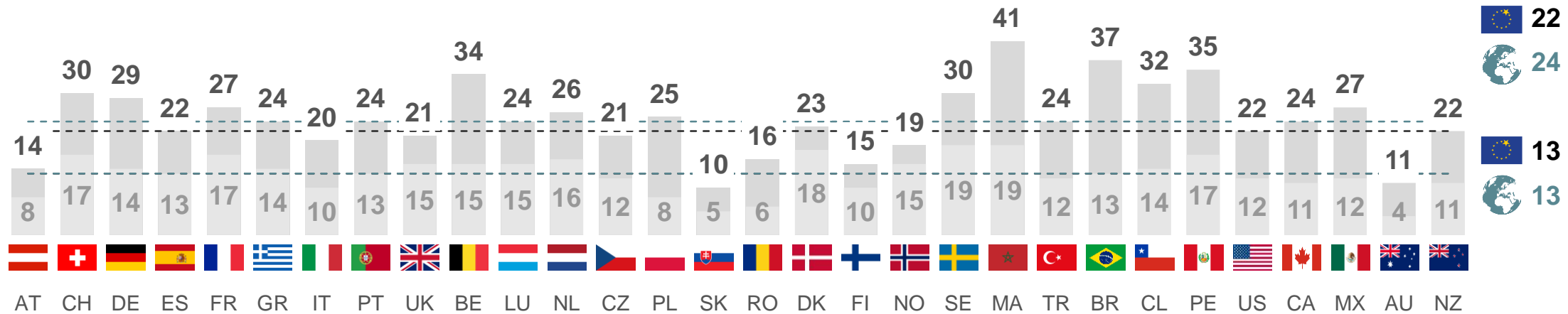
In %



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%  
 Question asked to respondents that are aware of mobility solutions

# CORPORATE CAR SHARING IMPLEMENTATION

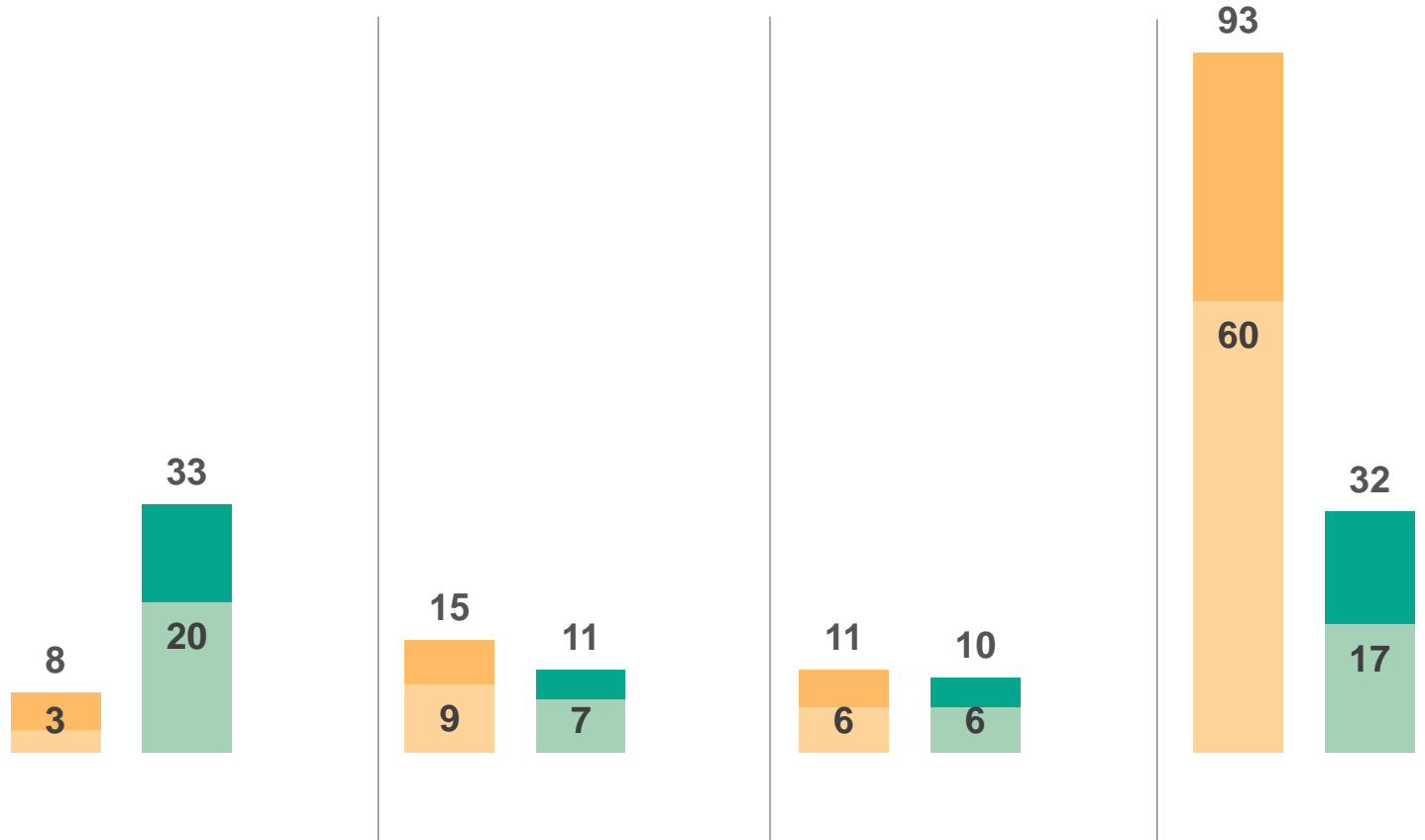
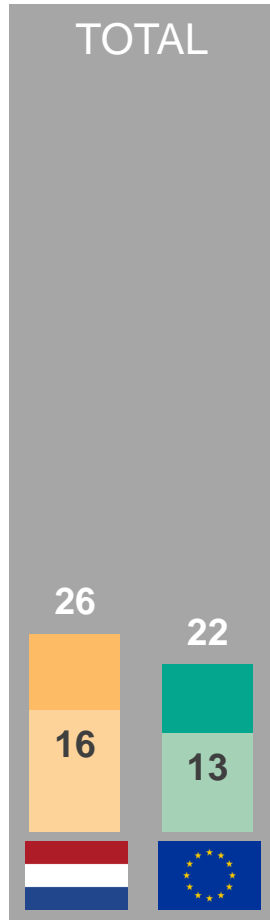
In %



ALREADY USING  
OR CONSIDER IN  
THE 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%  
 Question asked to respondents that are aware of mobility solutions

# RIDE SHARING IMPLEMENTATION

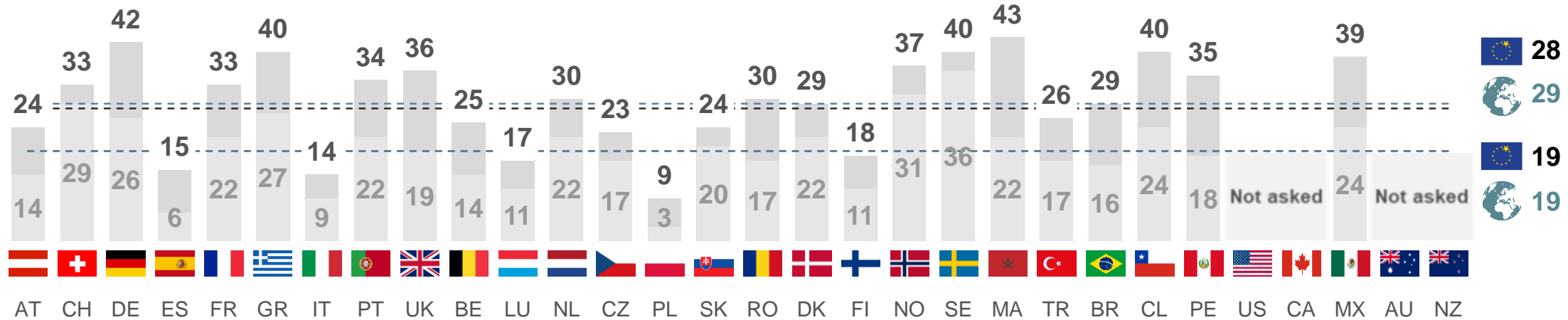
In %



ALREADY USING  
OR CONSIDER IN  
THE 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%  
 Question asked to respondents that are aware of mobility solutions  
 83

# RIDE SHARING IMPLEMENTATION

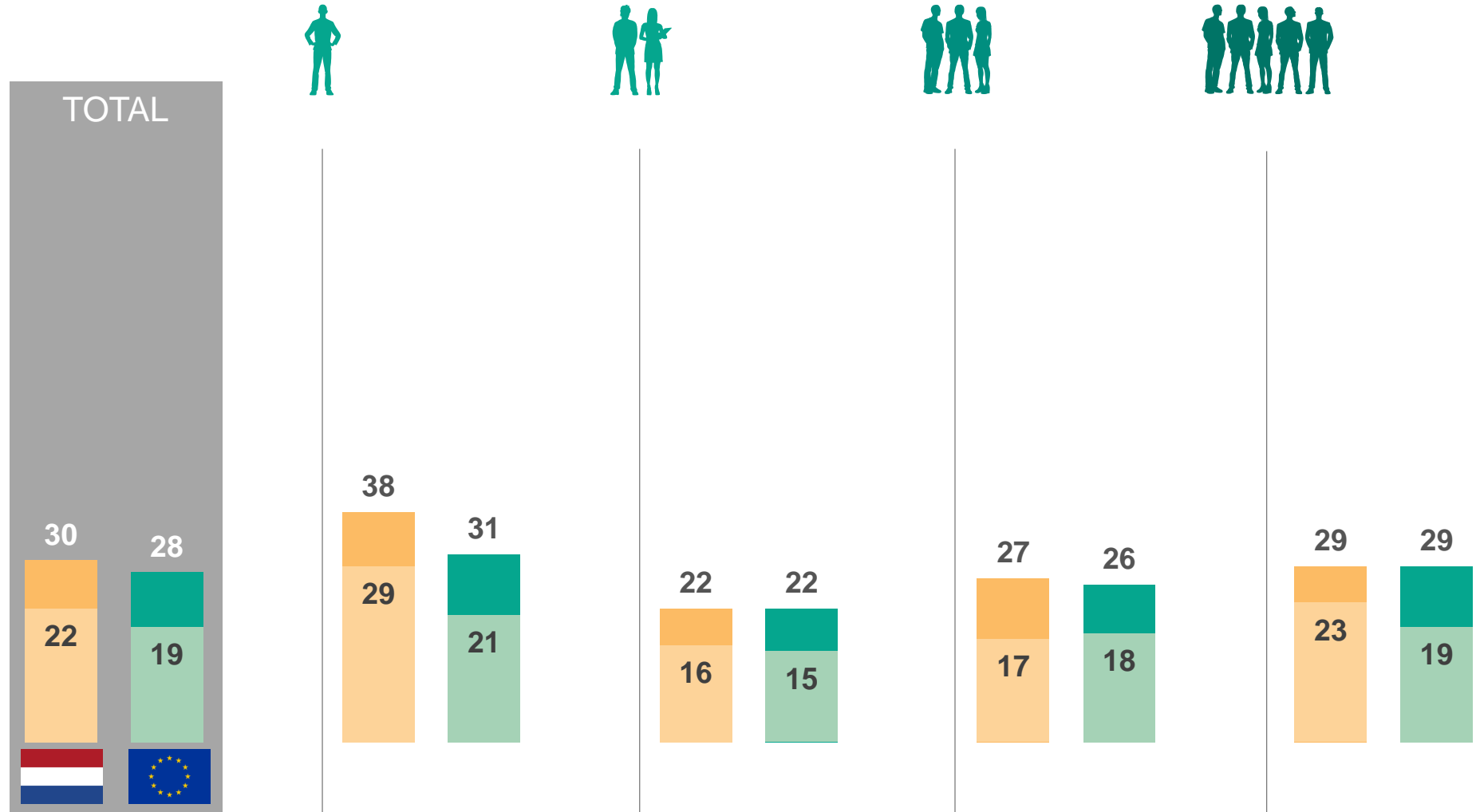
In %



ALREADY USING  
OR CONSIDER IN  
THE 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%  
 Question asked to respondents that are aware of mobility solutions

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

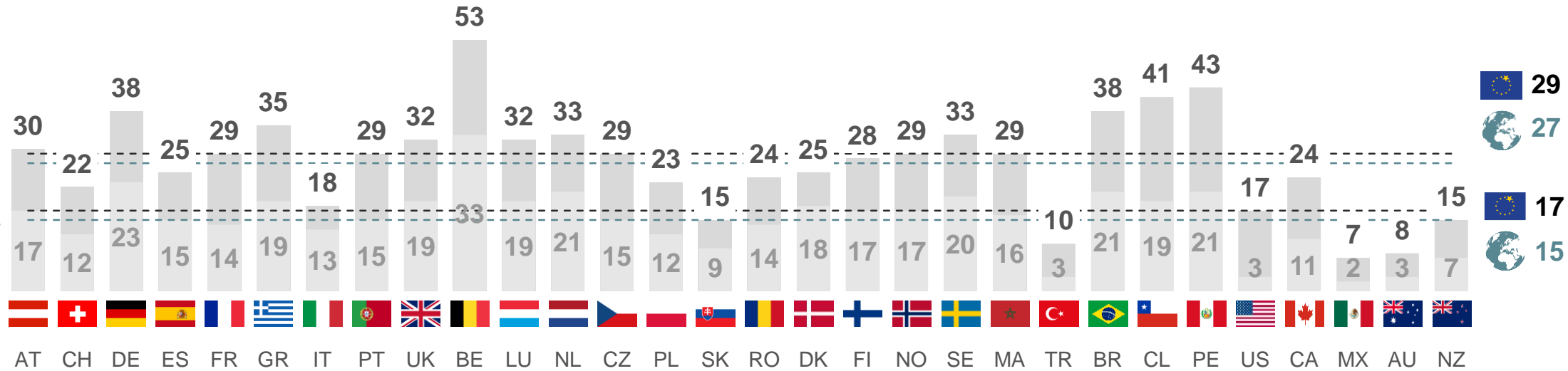
In %



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



EU 29  
Globe 27  
EU 17  
Globe 15

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

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

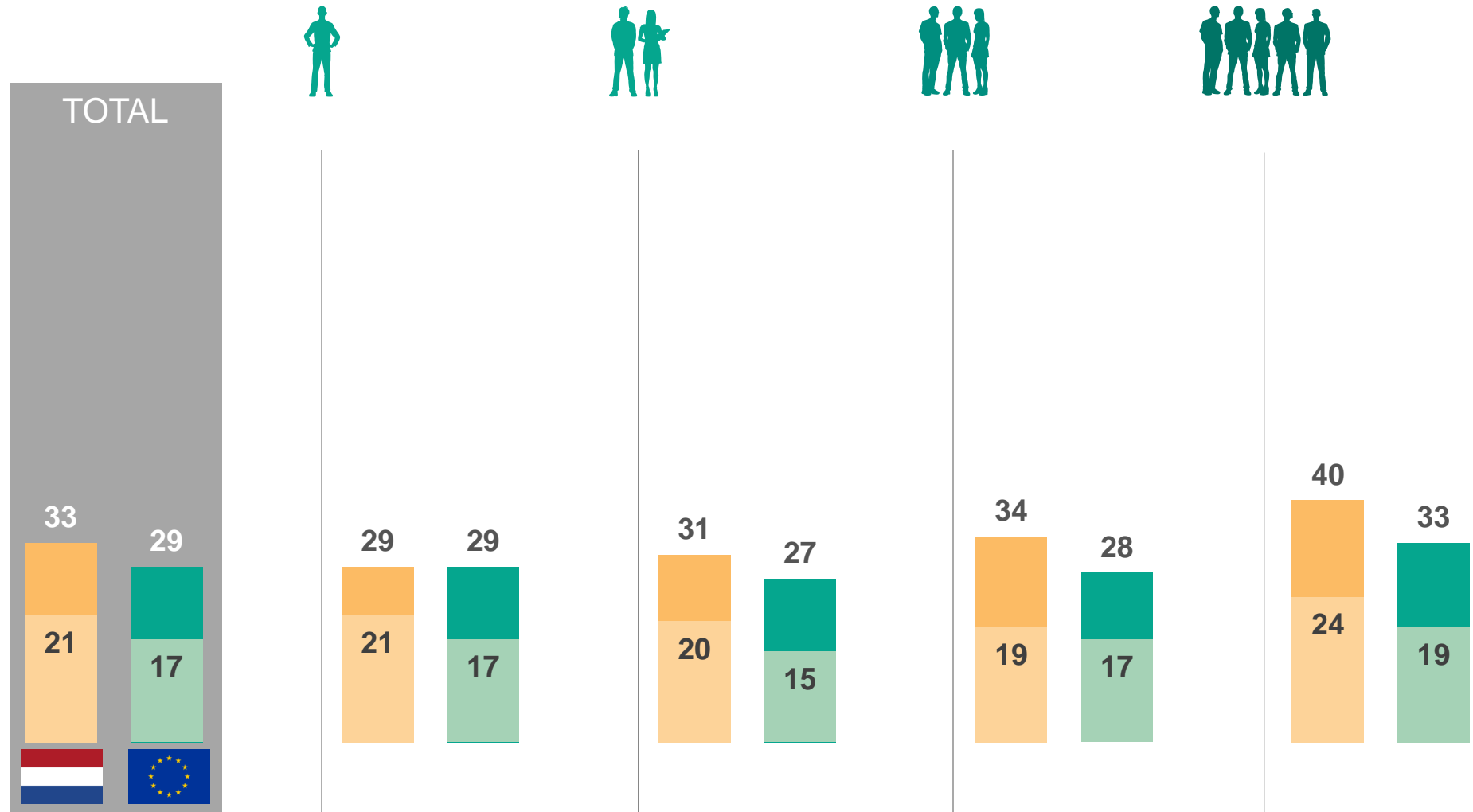
In %



ALREADY USING  
OR CONSIDER IN  
THE 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%  
 Question asked to respondents that are aware of mobility solutions

# PUBLIC TRANSPORT IMPLEMENTATION

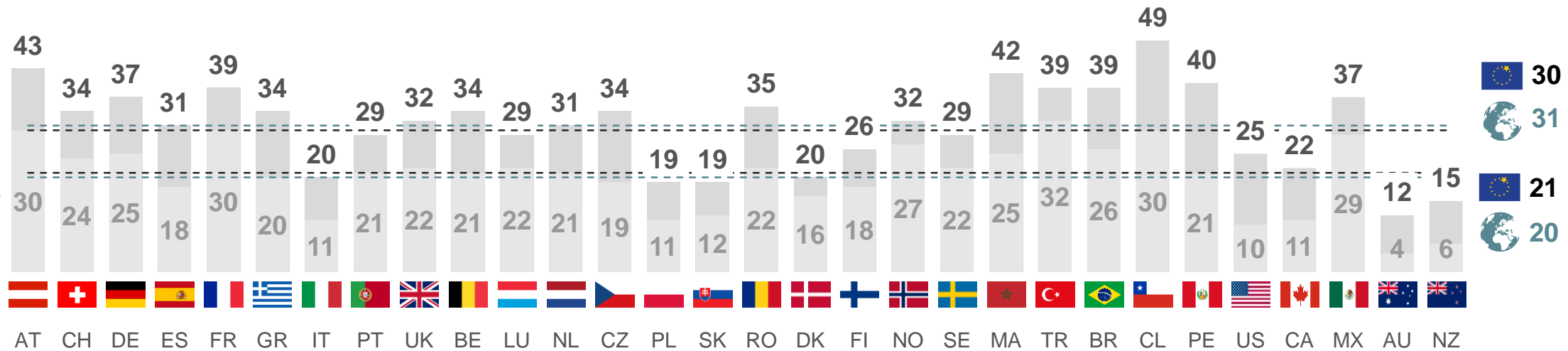
In %



ALREADY USING  
OR CONSIDER IN  
THE 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%  
Question asked to respondents that are aware of mobility solutions

# PUBLIC TRANSPORT IMPLEMENTATION

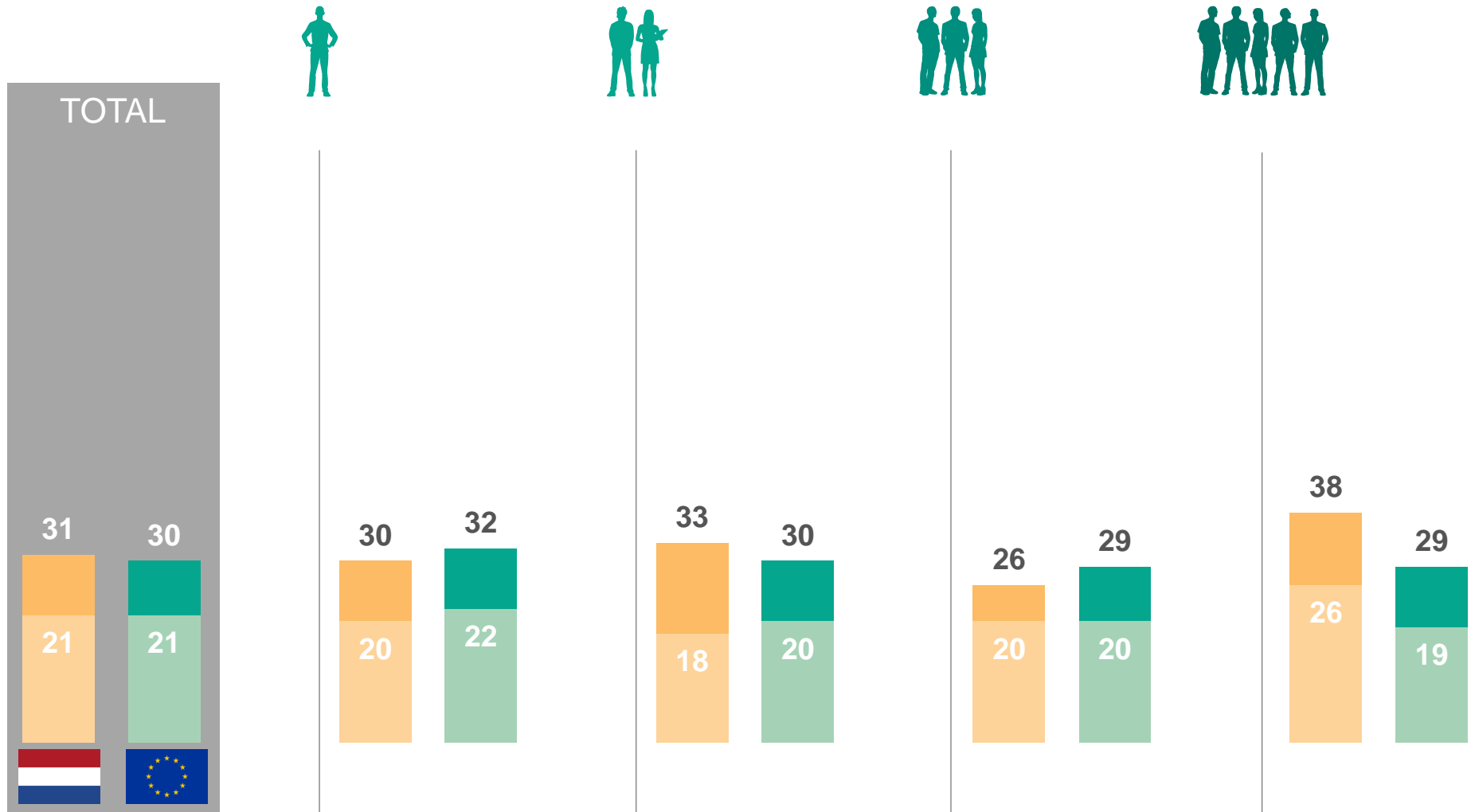
In %



ALREADY USING  
OR CONSIDER IN  
THE 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%  
 Question asked to respondents that are aware of mobility solutions



# MOBILITY BUDGET IMPLEMENTATION

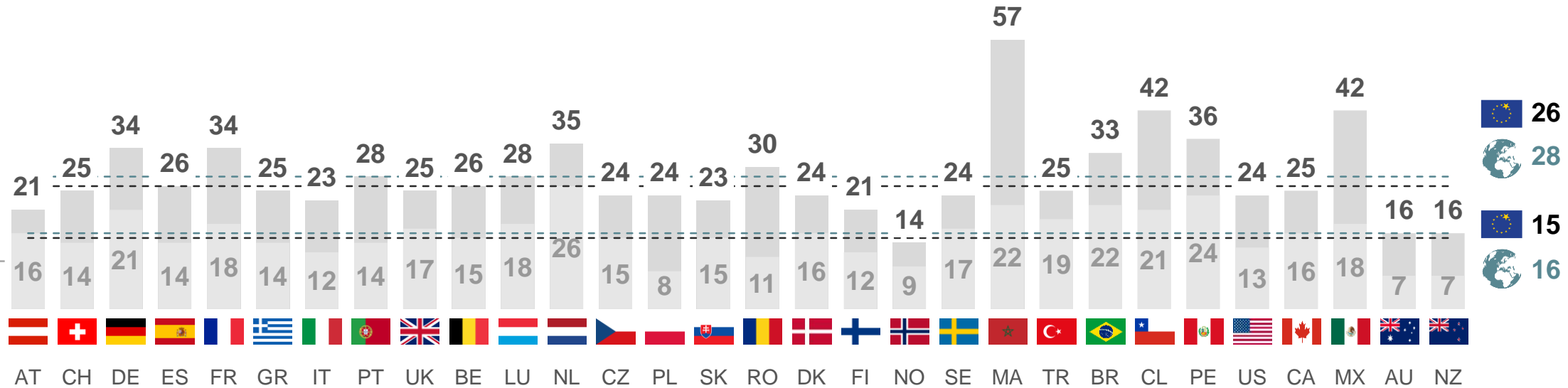
In %



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



EU 26  
Global 28  
EU 15  
Global 16

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

# MOBILITY BUDGET IMPLEMENTATION

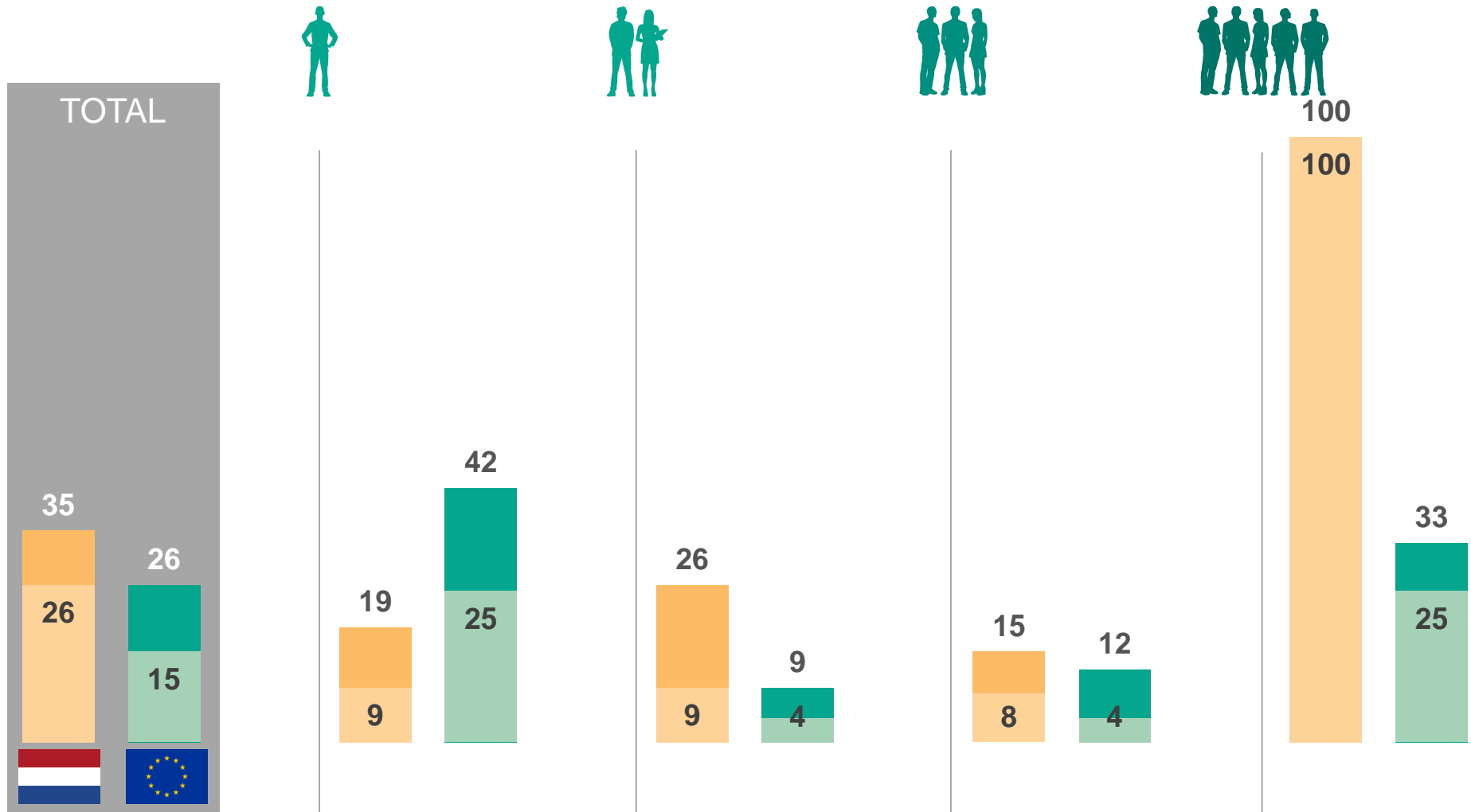
In %



ALREADY USING  
OR CONSIDER IN  
THE 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%  
 Question asked to respondents that are aware of mobility solutions

# AN APP TO BOOK MOBILITY SOLUTIONS IMPLEMENTATION

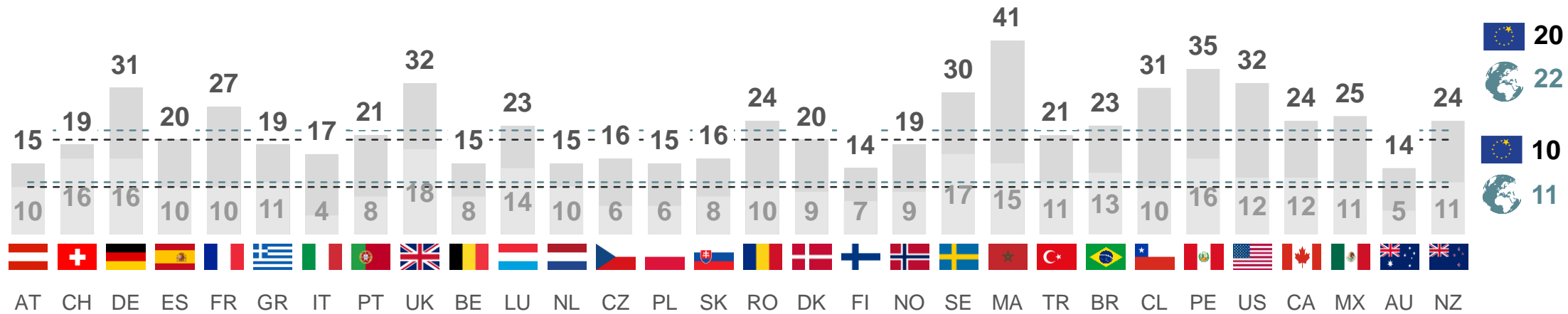
In %



ALREADY USING  
OR CONSIDER IN  
THE 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%  
 Question asked to respondents that are aware of mobility solutions

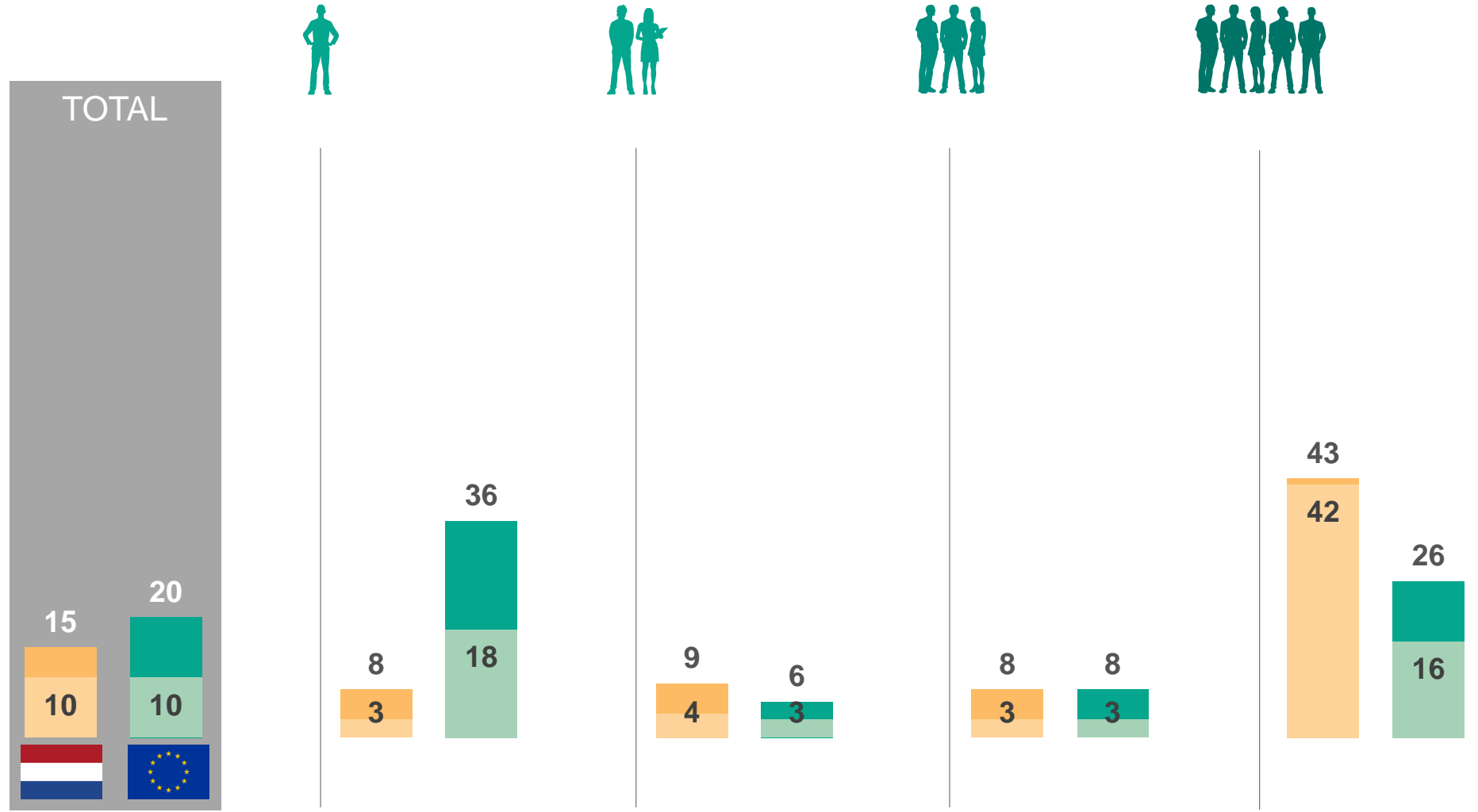
# AN APP TO BOOK MOBILITY SOLUTIONS IMPLEMENTATION

In %


  
 ALREADY USING  
 OR CONSIDER IN  
 THE 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%  
 Question asked to respondents that are aware of mobility solutions

# PRIVATE LEASE OR SALARY SACRIFICE IMPLEMENTATION

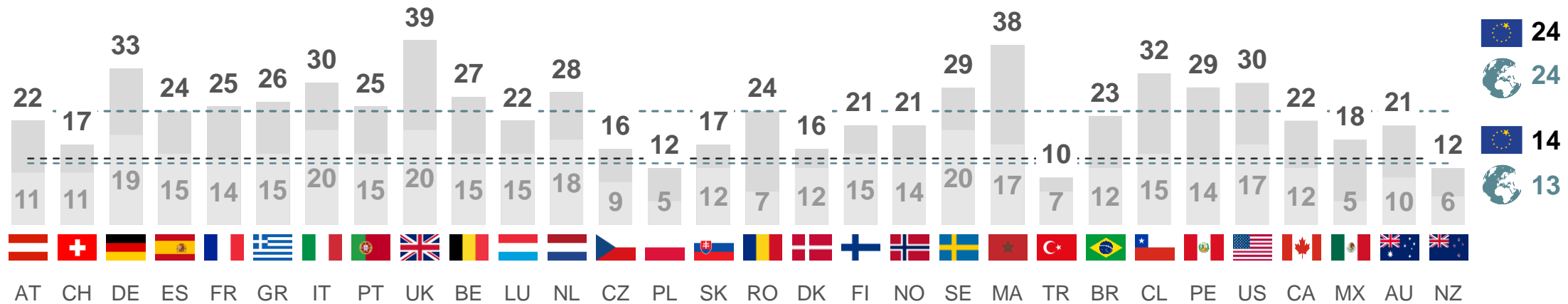
In %



ALREADY USING  
OR CONSIDER IN  
THE 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%  
 Question asked to respondents that are aware of mobility solutions

# PRIVATE LEASE OR SALARY SACRIFICE IMPLEMENTATION

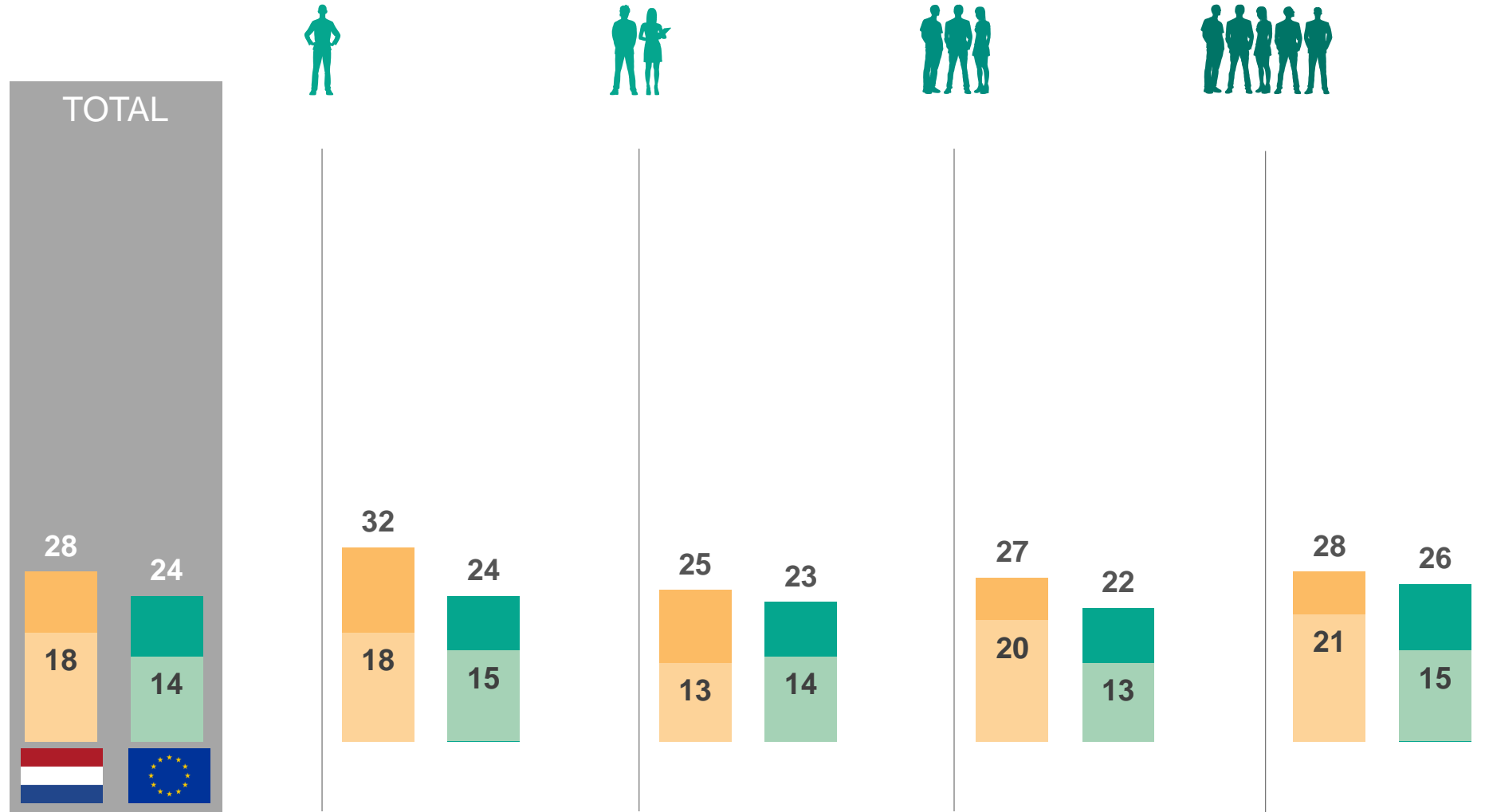
In %



ALREADY USING  
OR CONSIDER IN  
THE 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%  
 Question asked to respondents that are aware of mobility solutions

# SHORT OR MID-TERM RENTAL VEHICLES IMPLEMENTATION

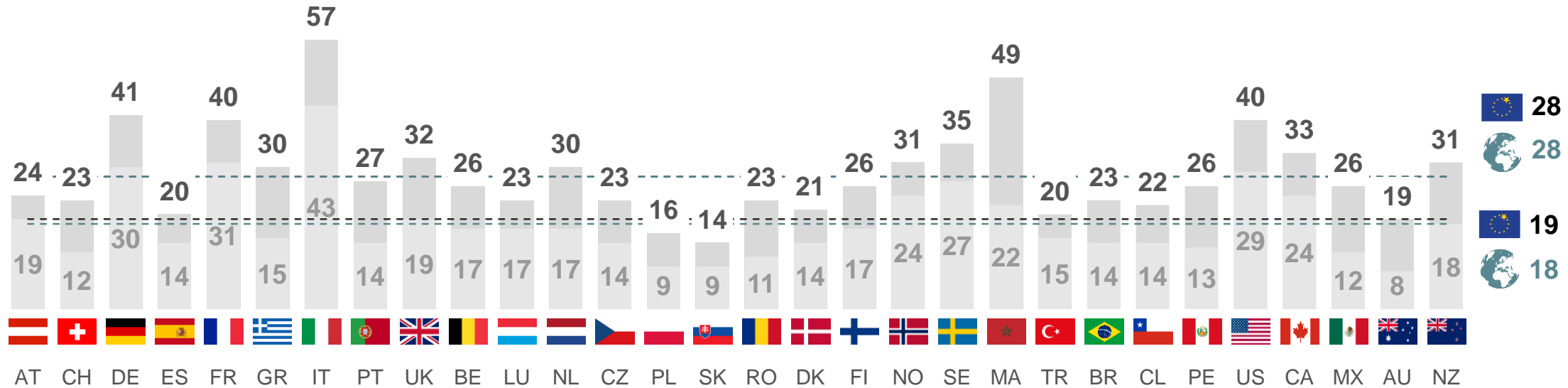
In %



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



EU 28  
Globe 28  
EU 19  
Globe 18

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

# SHORT OR MID-TERM RENTAL VEHICLES IMPLEMENTATION

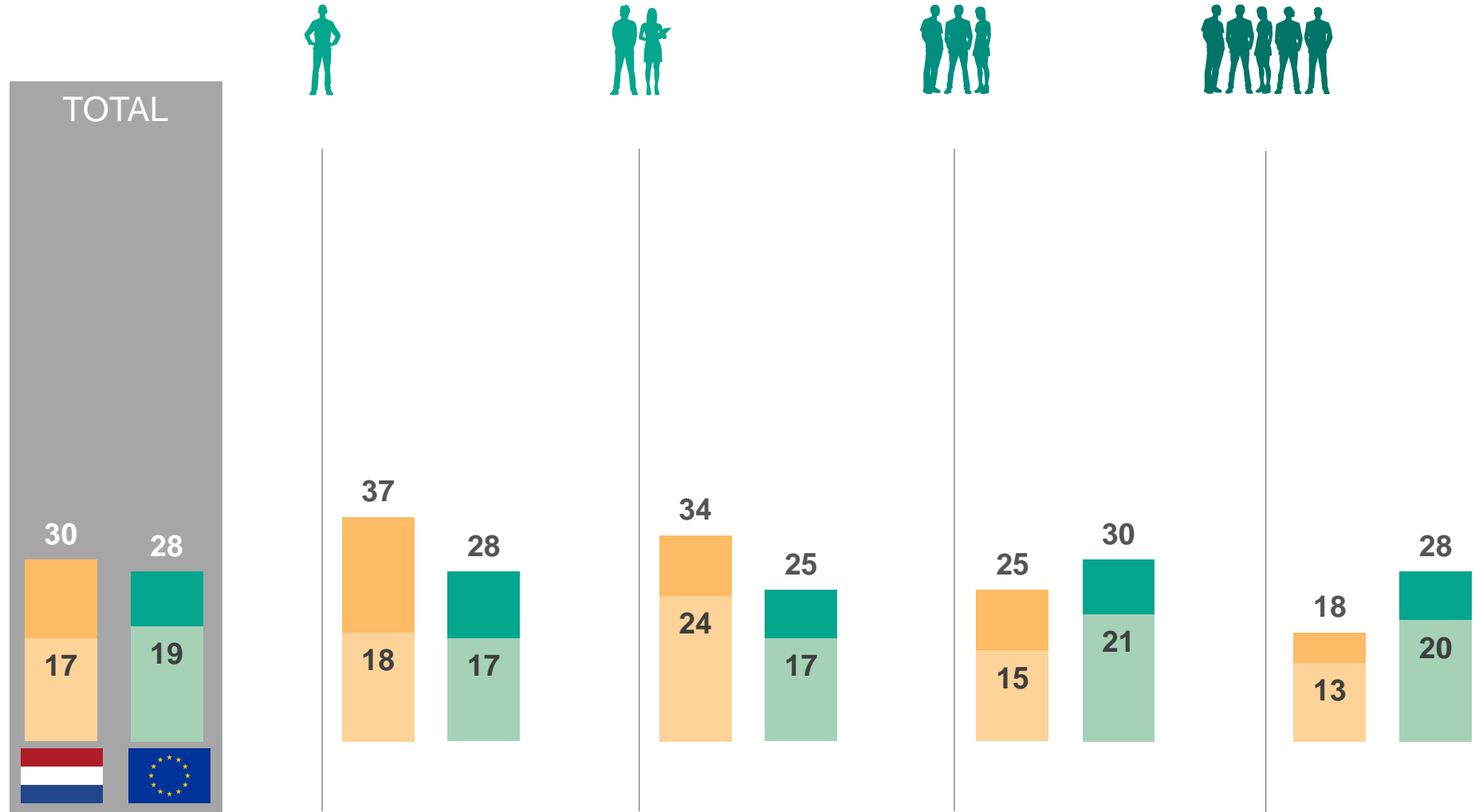
In %



ALREADY USING  
OR CONSIDER IN  
THE 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%  
 Question asked to respondents that are aware of mobility solutions



# CAR OR CASH ALLOWANCE IMPLEMENTATION

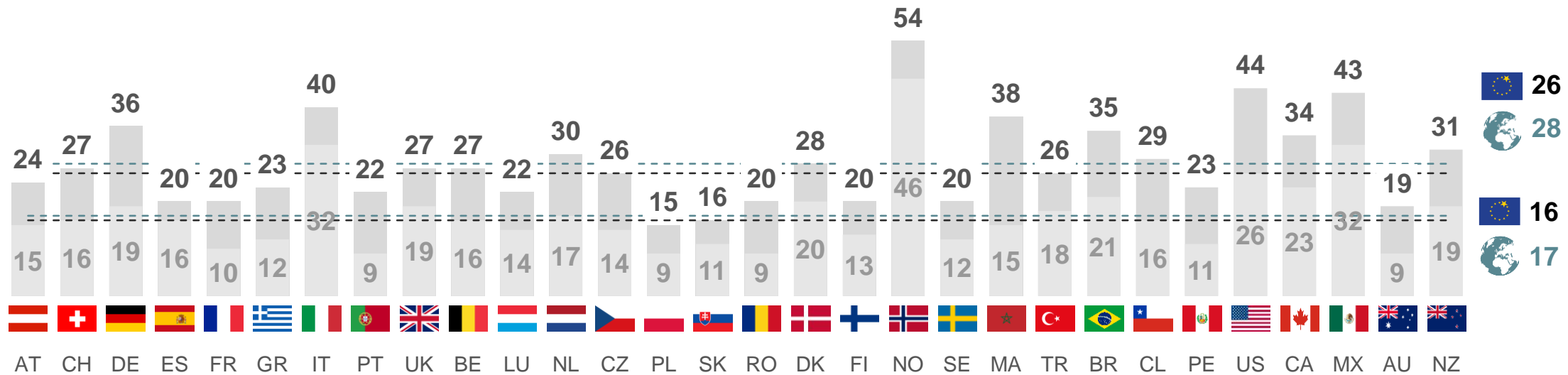
In %



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



26  
 28  
 16  
 17

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

# CAR OR CASH ALLOWANCE IMPLEMENTATION

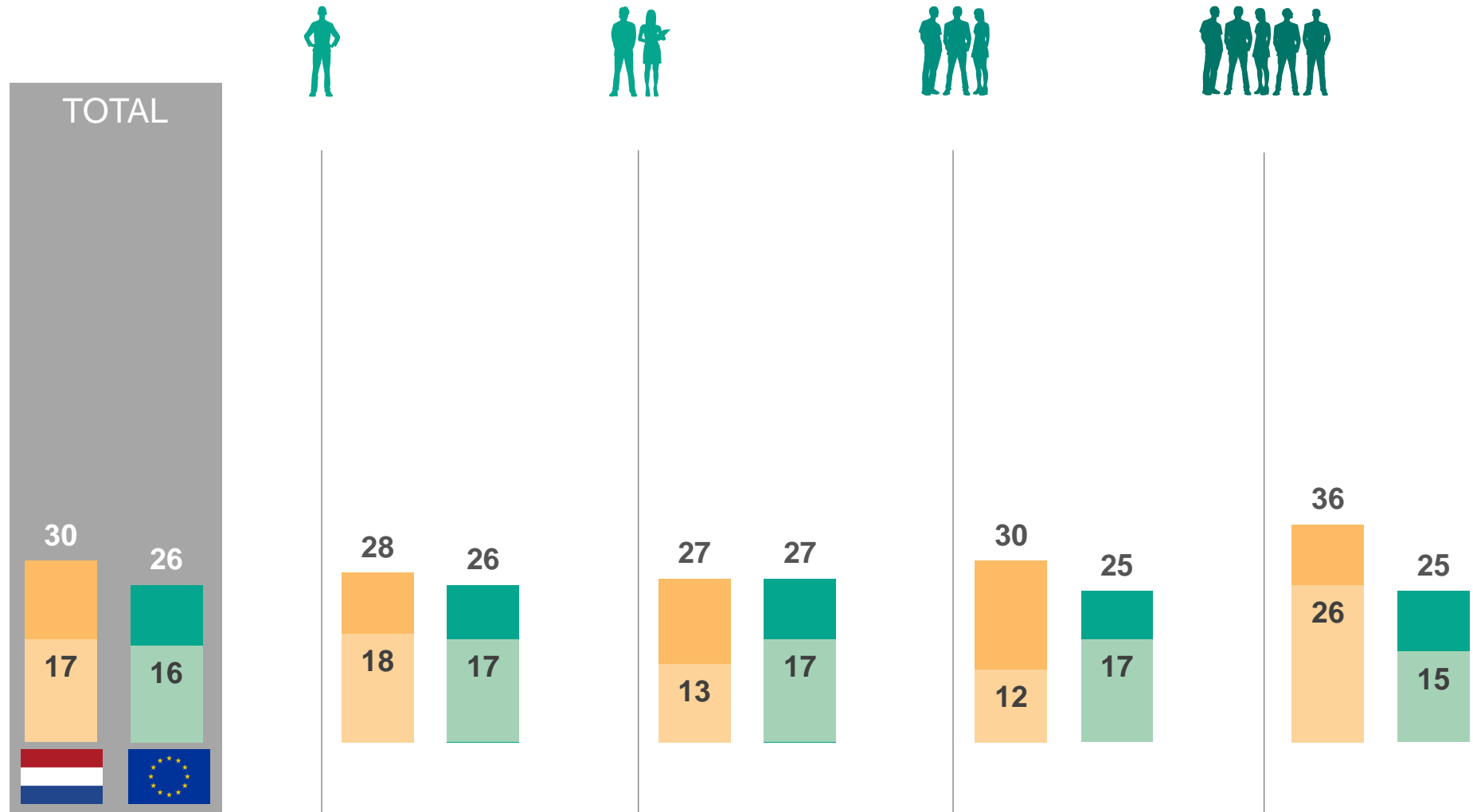
In %



ALREADY USING  
OR CONSIDER IN  
THE 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%  
 Question asked to respondents that are aware of mobility solutions

# REASONS FOR IMPLEMENTING OR CONSIDERING MOBILITY SOLUTIONS

In %



# INTEREST IN OFFERING EMPLOYEES A MOBILITY BUDGET

In %

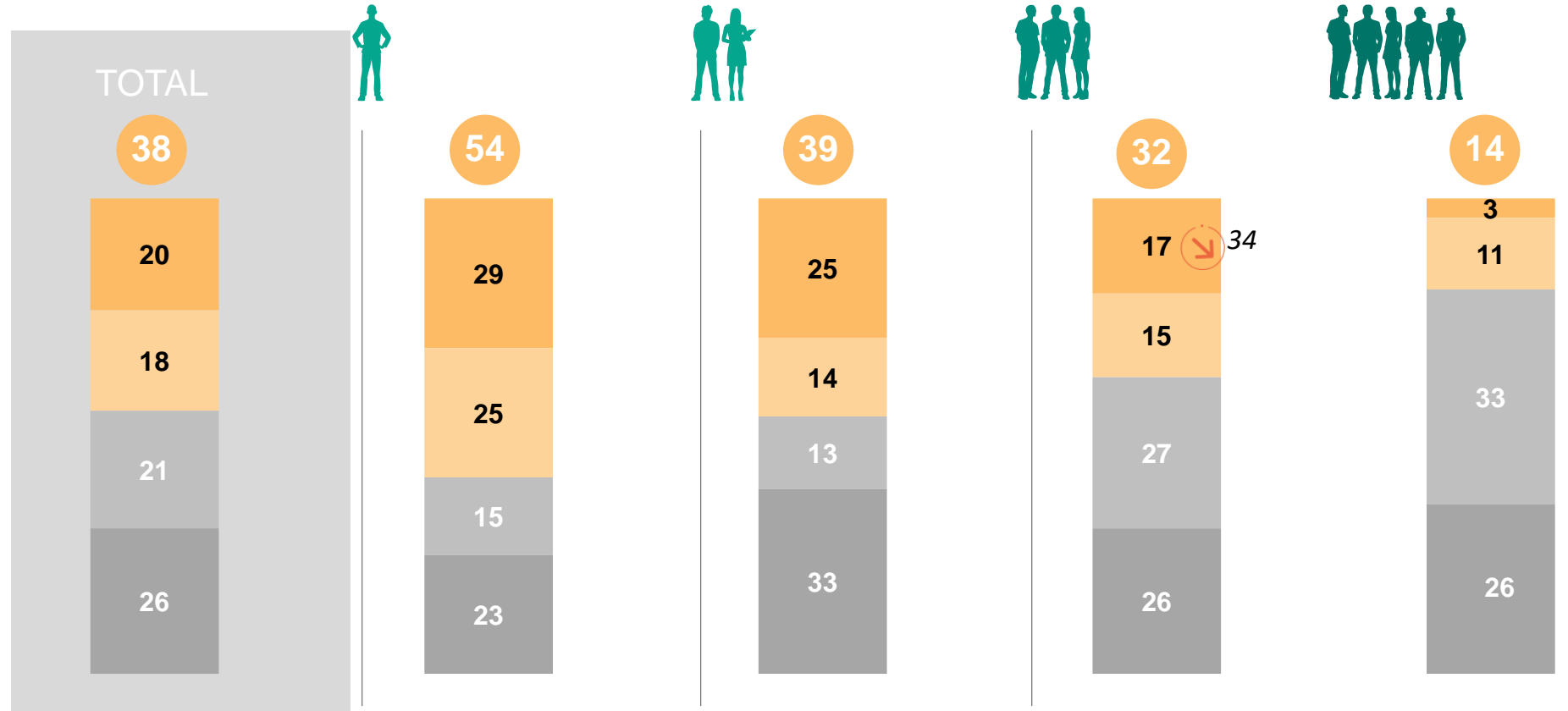


Passenger cars + LCVs

**NET YES**  
(certainly + probably)



- 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%

Question asked to respondents that are aware of mobility solutions

# REASONS TO OFFER A MOBILITY BUDGET

In %



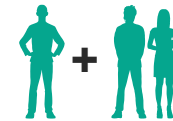
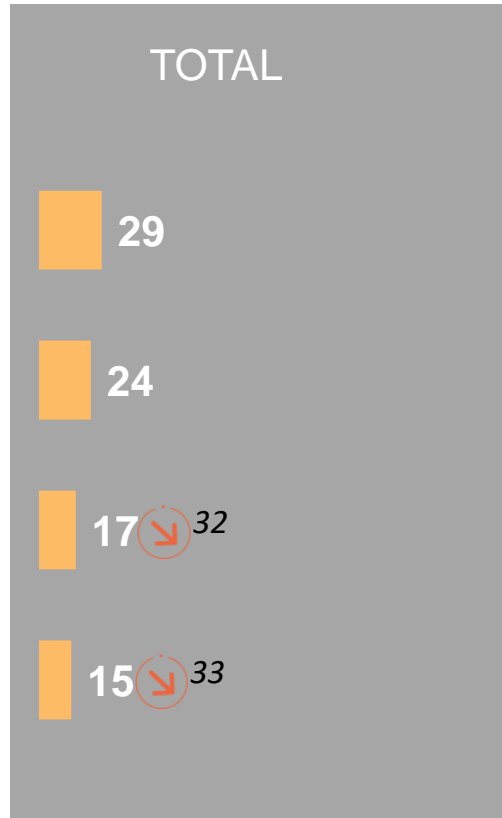
Passenger cars + LCVs

It brings lower cost of mobility

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



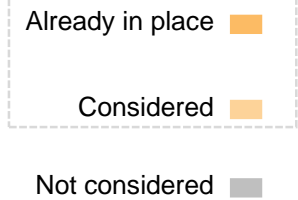
# SPECIFIC STRATEGY ON THE MOBILITY CO2 FOOTPRINT

In %



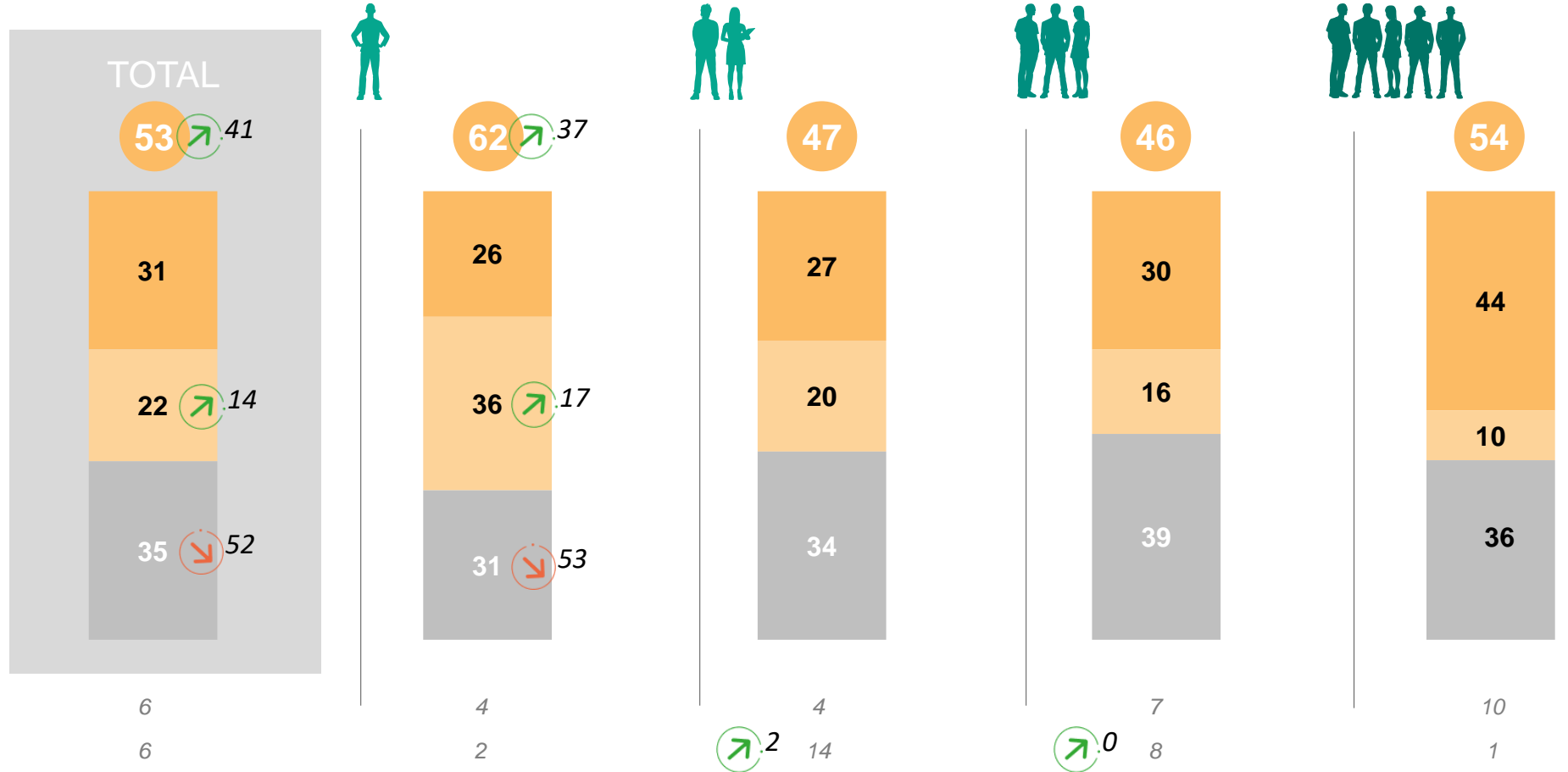
Passenger cars + LCVs

**NET** Already in place or consider



Don't know what it is

Don't know



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

# MOBILITY SOLUTION TOOLS

In %



Passenger cars + LCVs

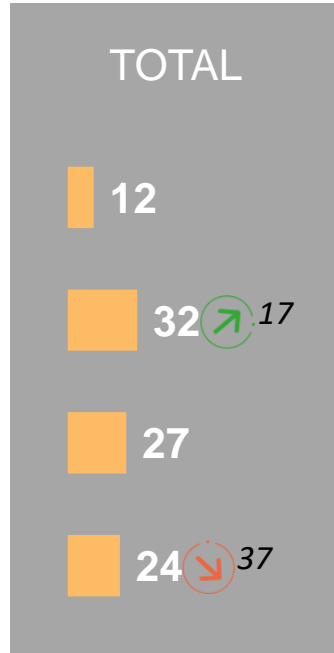
One or more dedicated apps

A dedicated platform

Manually

No dedicated tooling

Don't know



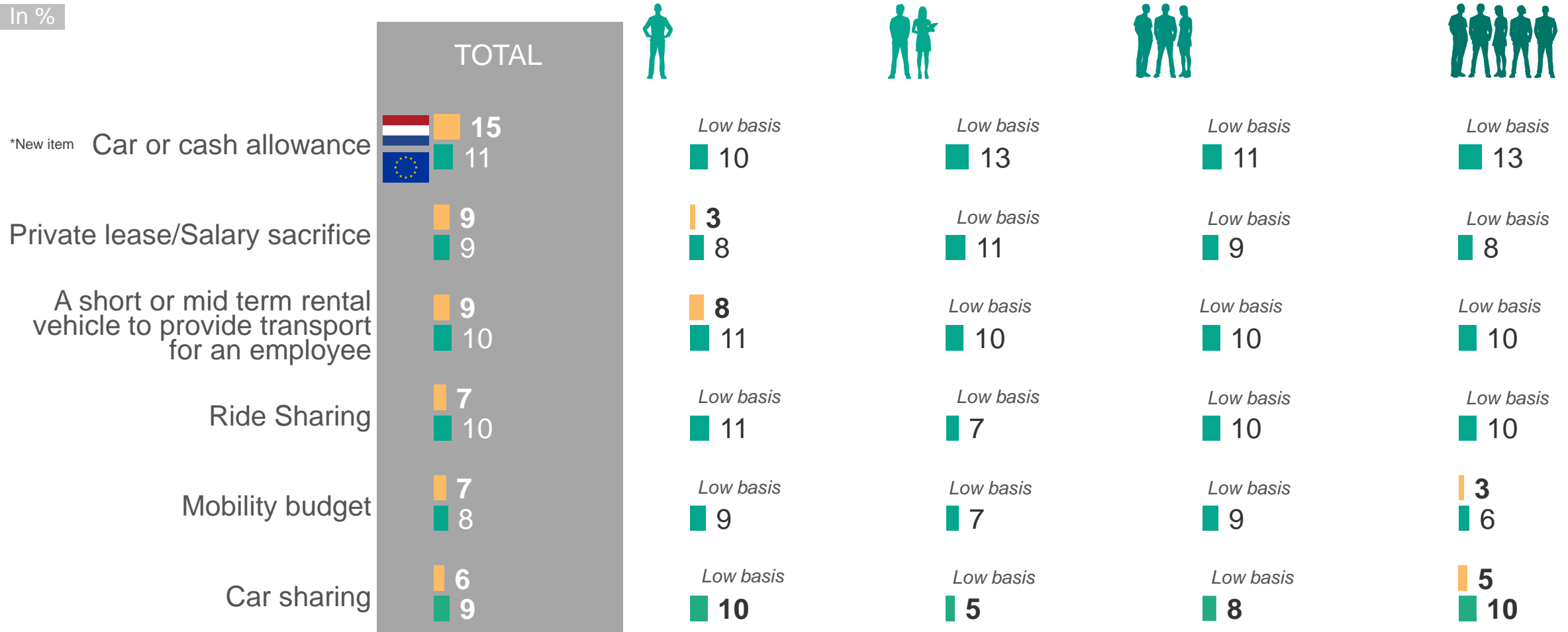
How do you plan to facilitate the use of these modes of transportation?  
Basis: companies with corporate vehicles = 100%

Question asked to respondents that are aware of mobility solutions

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

Certainly

In %



Would you anticipate that your company would give up all or part of the company car fleet for such alternatives?

**Basis: companies using or considering at least one mobility solution**

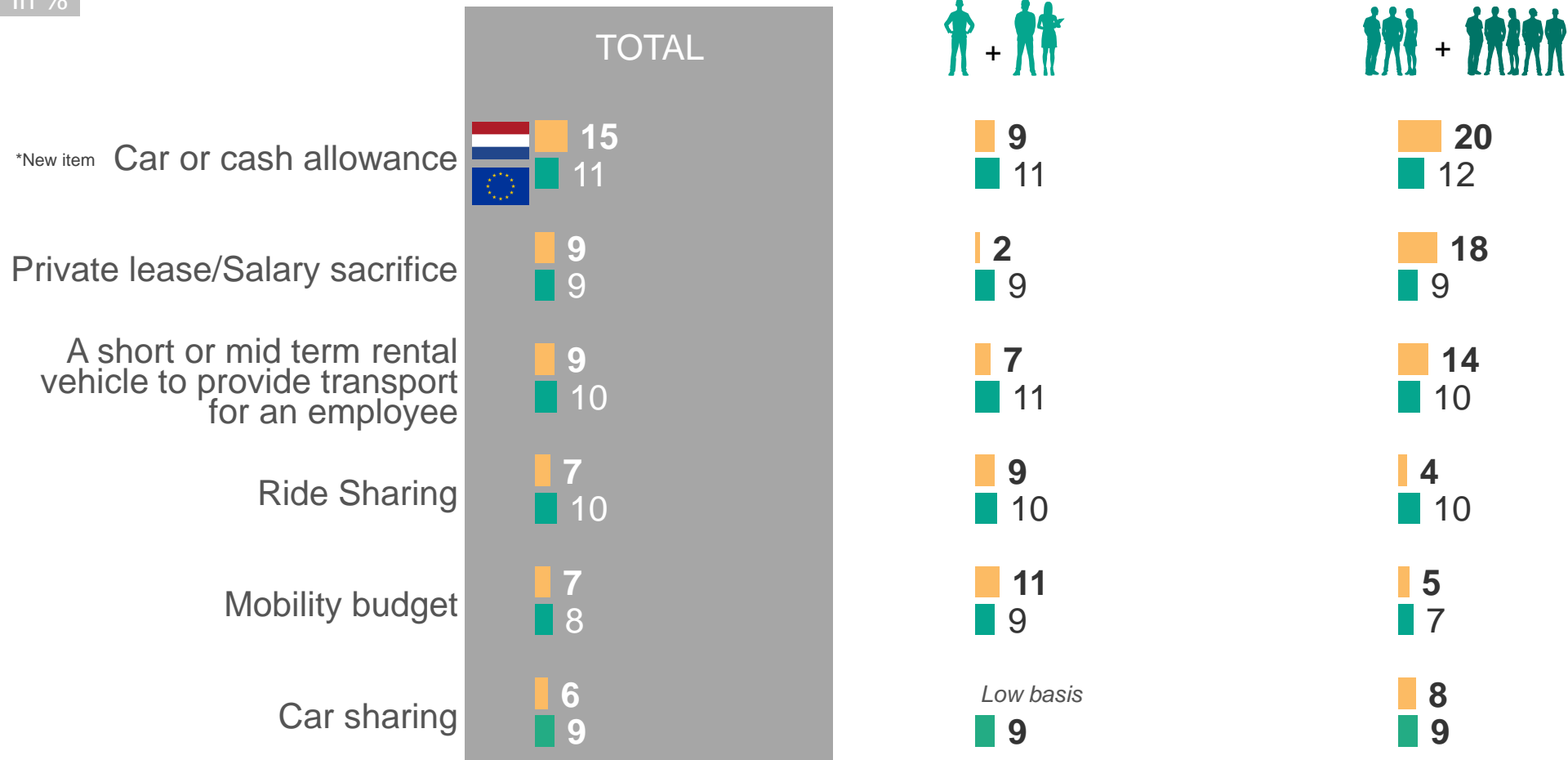
Question asked to respondents that are aware of mobility solutions



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

Certainly

In %



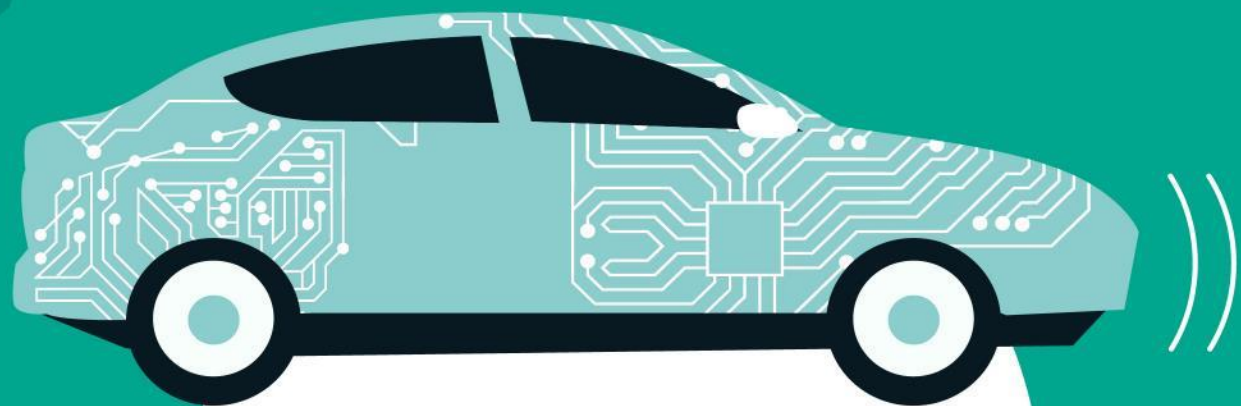
Would you anticipate that your company would give up all or part of the company car fleet for such alternatives?

**Basis: companies using or considering at least one mobility solution**

Question asked to respondents that are aware of mobility solutions

7

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



# THE USE OF TELEMATICS IS IN LINE WITH THE EUROPEAN AVERAGE

1

- In line with European results, **47% of Dutch companies are using Telematics whether for passenger cars or LCVs.** In details, the level of connected vehicles is the same among passenger car fleets and LCV fleets (31% among each). **This growth is due to a higher equipment of passenger cars (31% versus 20% last year).**

2

- The use of connected vehicles **relies mainly on the possibility to locate vehicles or improve vehicle security, especially for big companies, and on improving operational efficiency.**

# PROPORTION OF COMPANIES USING CONNECTED VEHICLES

All vehicles

In %



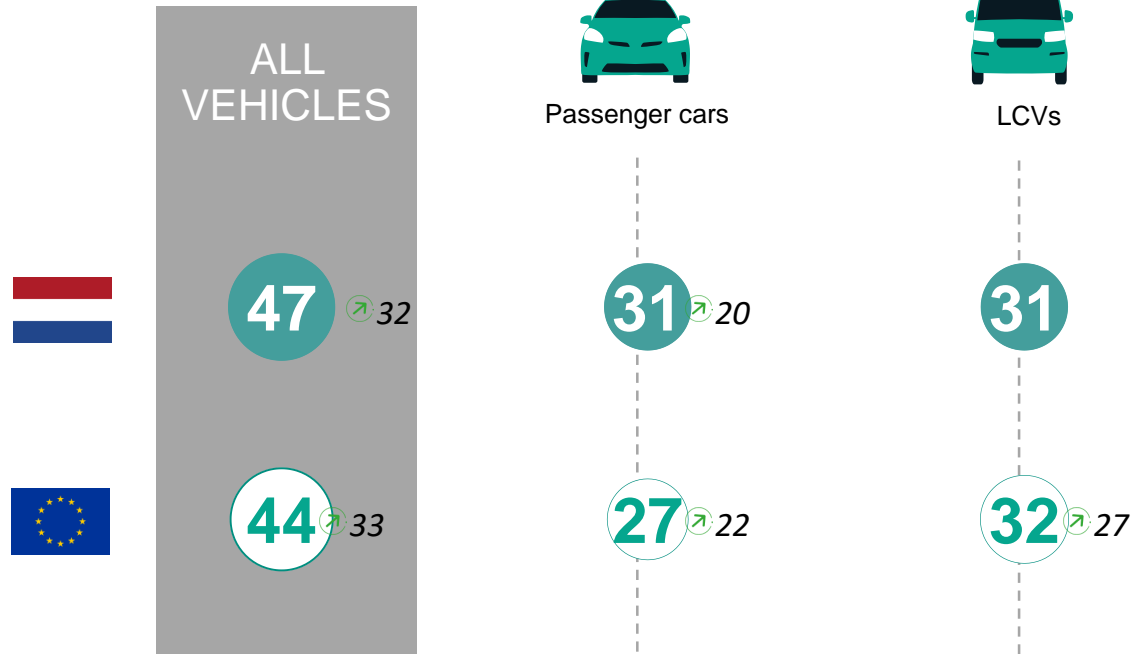
Passenger cars + LCVs

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

## HOW TO READ THE RESULTS ?

47% of companies with fleet using connected vehicles for all or part of their fleet.

31% use connected vehicles for passenger cars, while 31% use connected vehicles for 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

All vehicles

In %



Passenger cars + LCVs

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



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

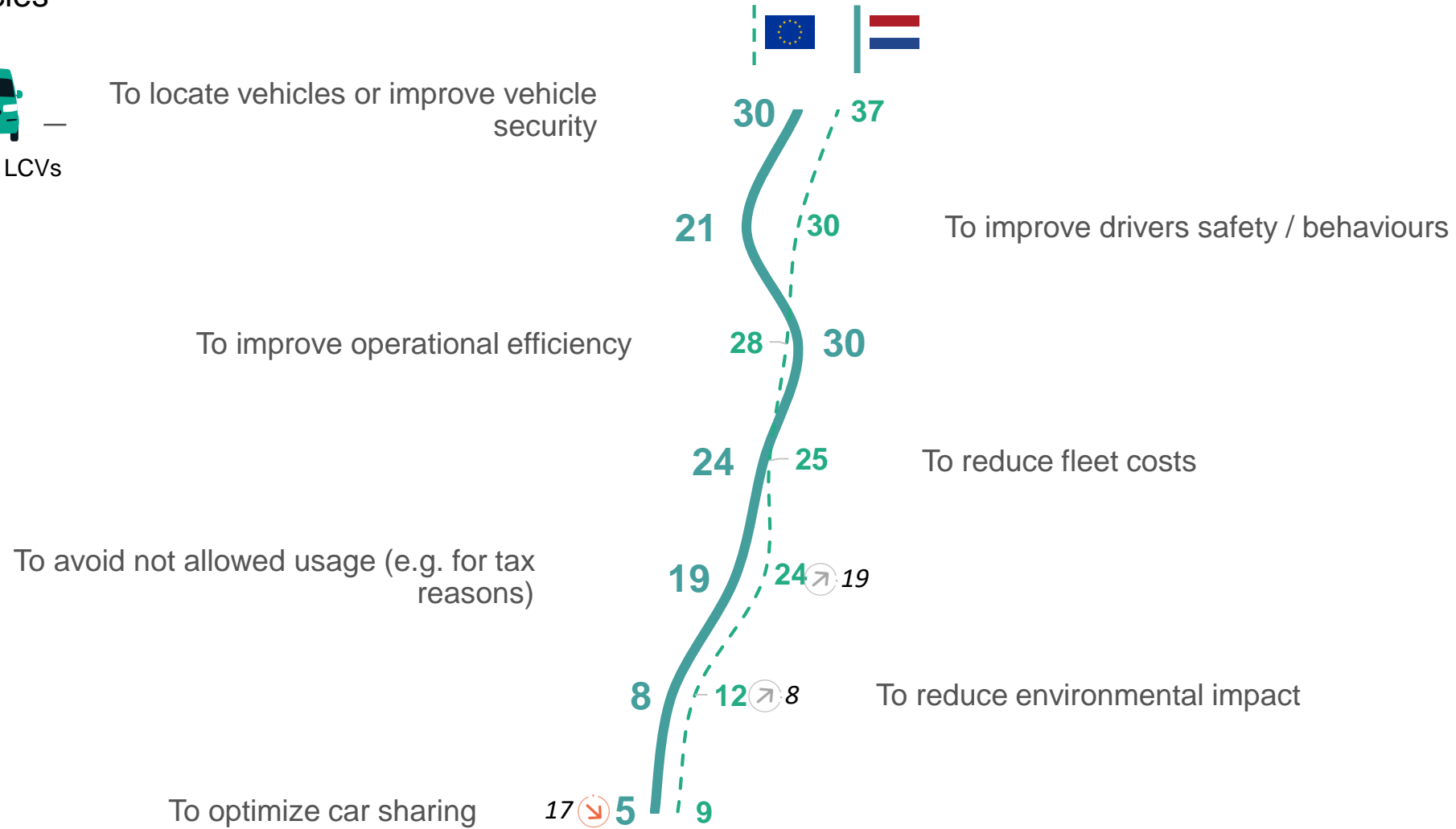
# REASONS FOR USING CONNECTED VEHICLES

All vehicles

In %



Passenger cars + LCVs

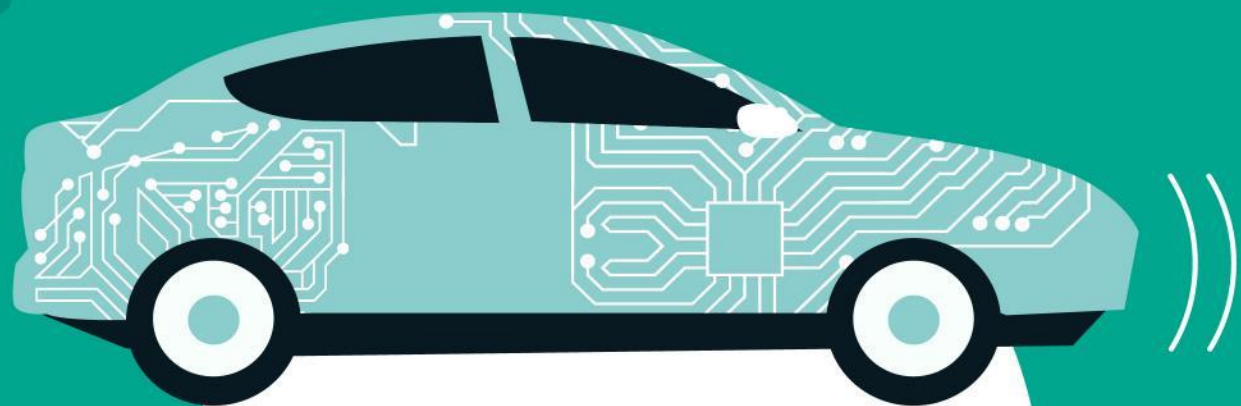


What are the two main reasons why your fleet is connected by Telematics?  
**Basis: companies with connected vehicles thanks to Telematics**

7

# CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY

## A. PASSENGER CARS



# PROPORTION OF COMPANIES USING CONNECTED VEHICLES

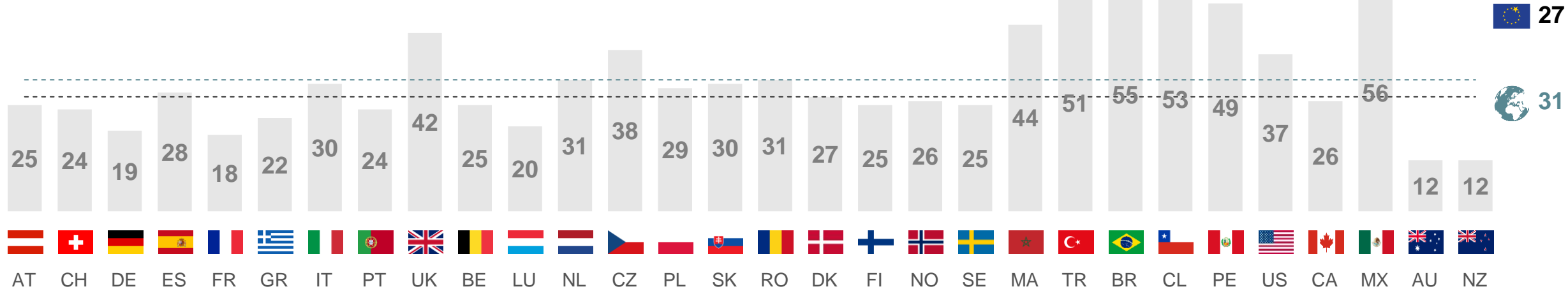
## Passenger cars

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*



# PROPORTION OF COMPANIES USING CONNECTED VEHICLES

## Passenger cars

In %

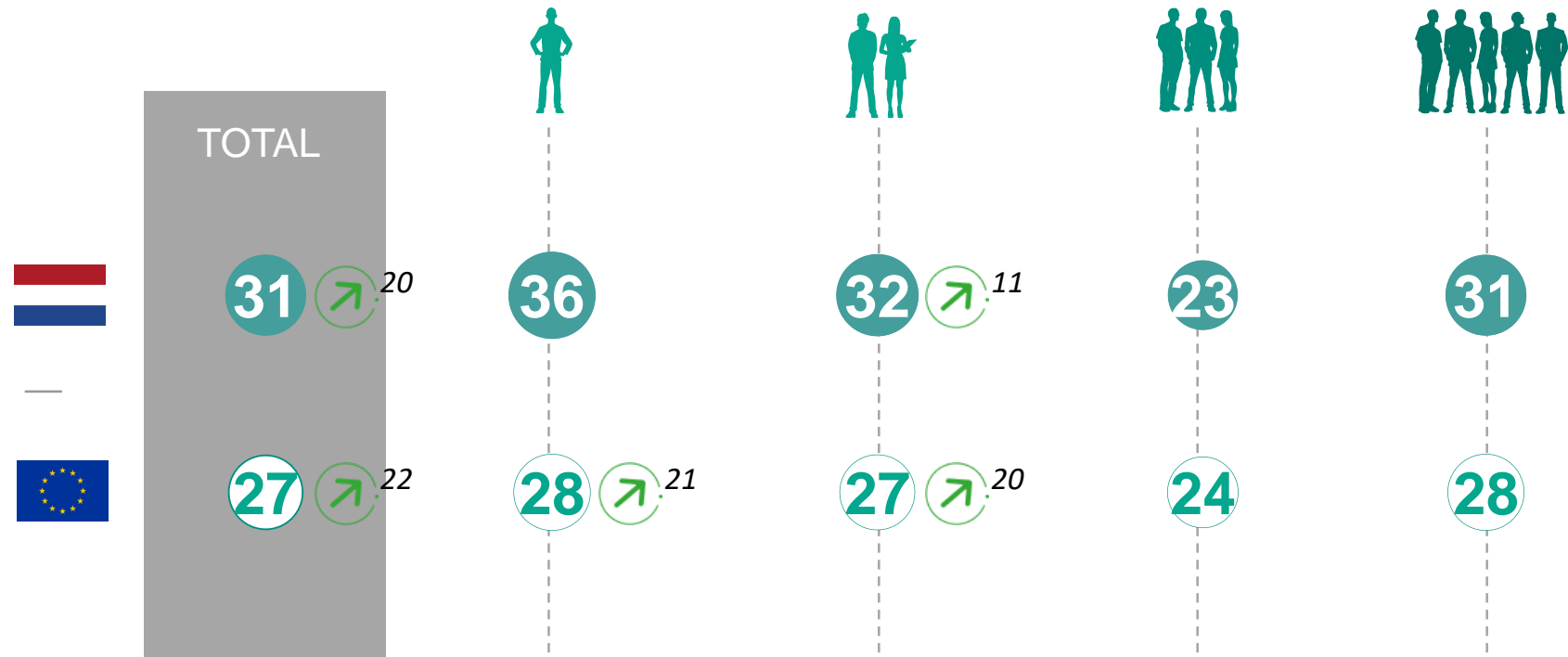


Passenger cars

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

HOW TO READ THE RESULTS ?

31% use connected vehicles for 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 at least one passenger car in fleet**

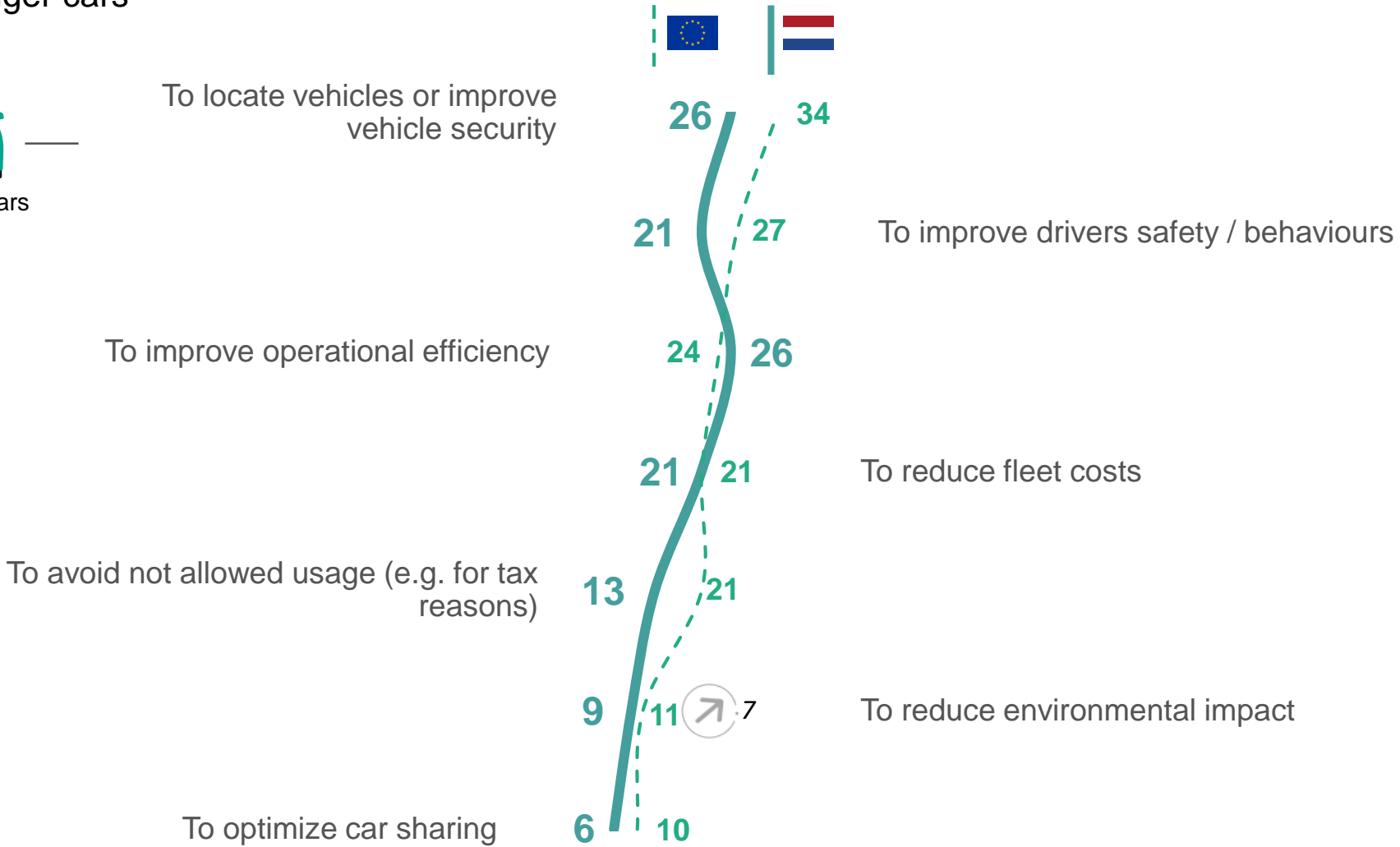
# REASONS FOR USING CONNECTED VEHICLES

## Passenger cars

In %



Passenger cars

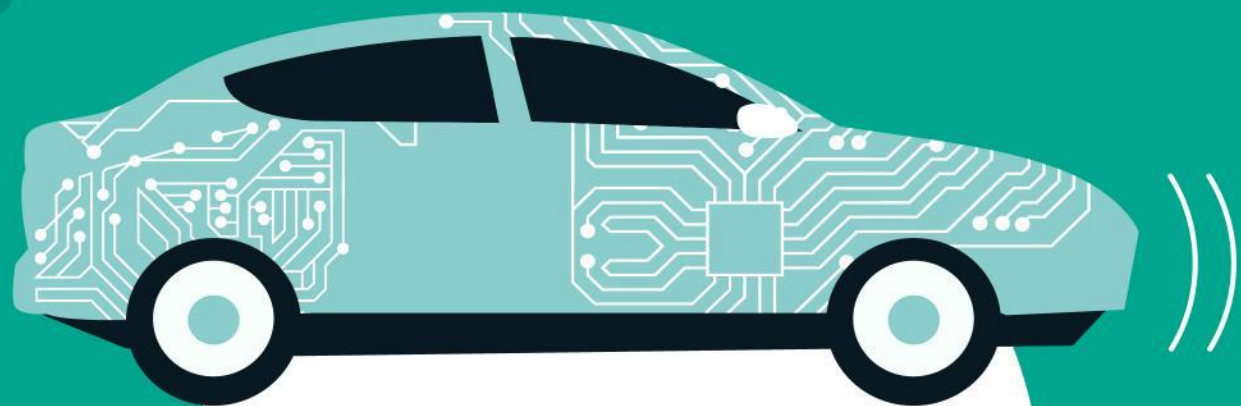


What are the two main reasons why your fleet is connected by Telematics?  
 Basis: companies with connected passenger cars thanks to Telematics

7

# CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY

## B. LCVs



# PROPORTION OF COMPANIES USING CONNECTED VEHICLES

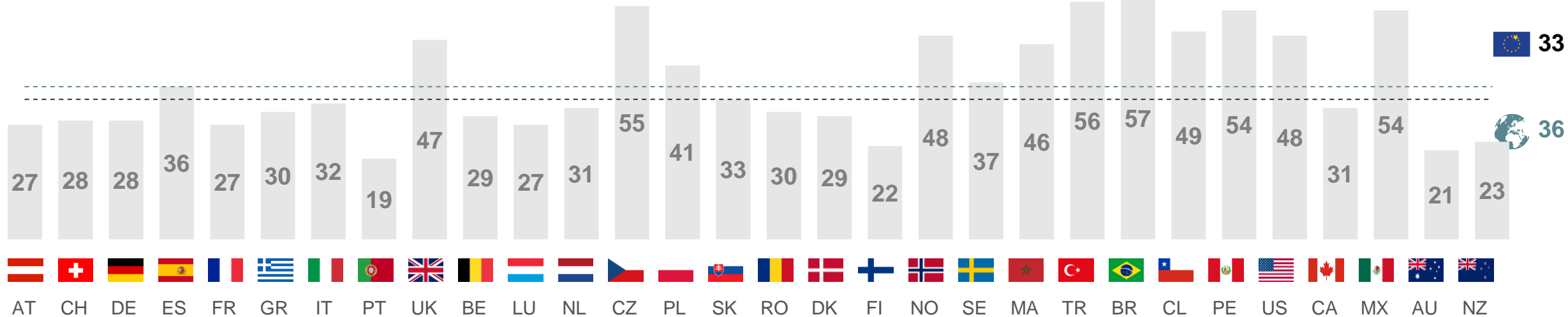
LCVs

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

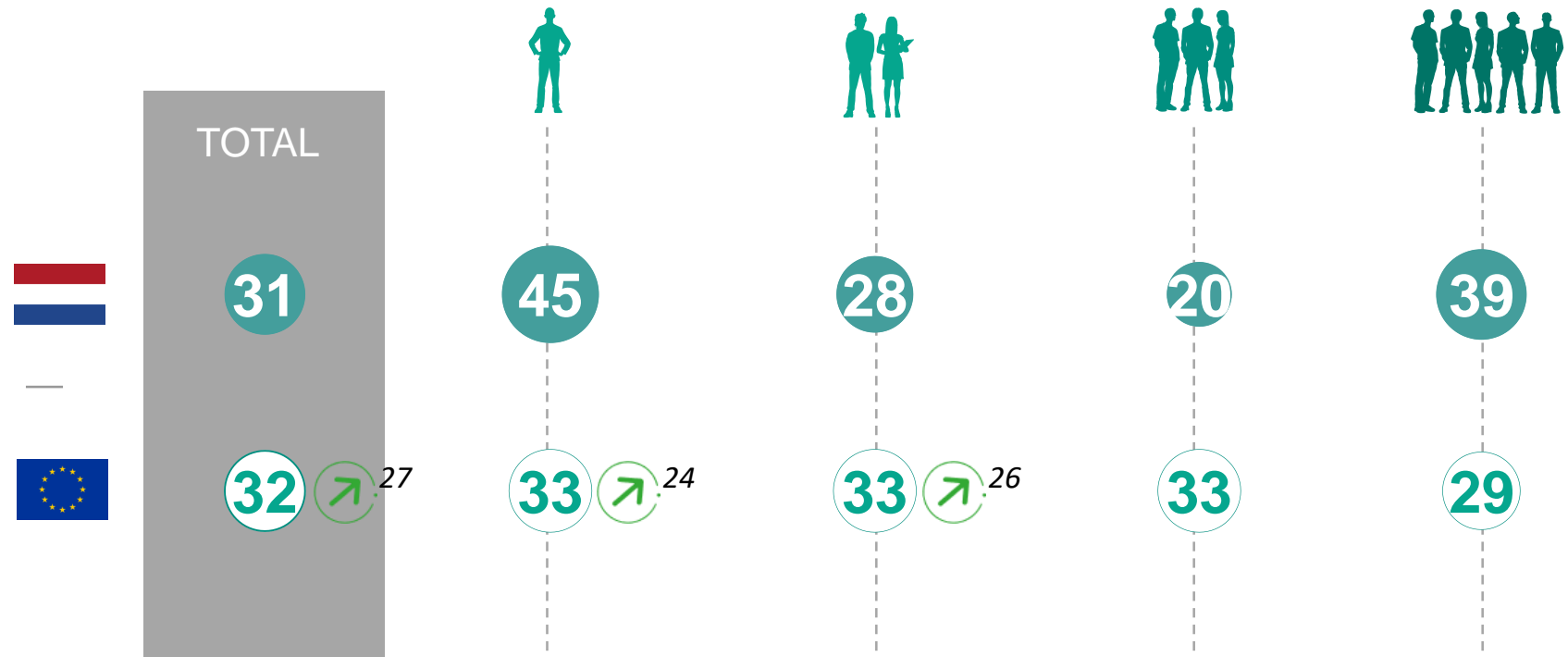
In %



LCVs

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

HOW TO READ THE RESULTS ?  
31% use connected vehicles for 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 at least one LCV car in fleet**

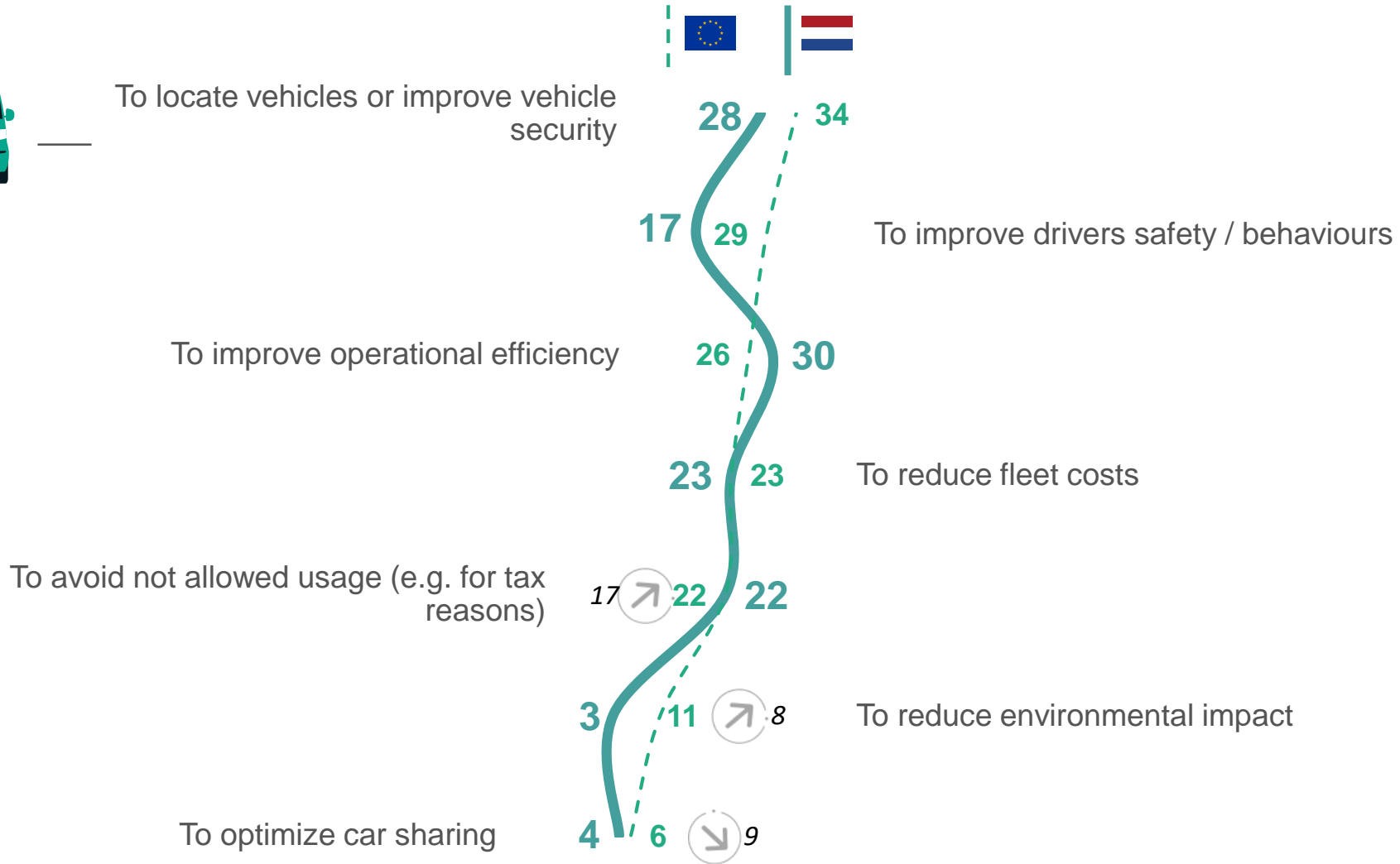
# REASONS FOR USING CONNECTED VEHICLES

LCVs

In %



LCVs

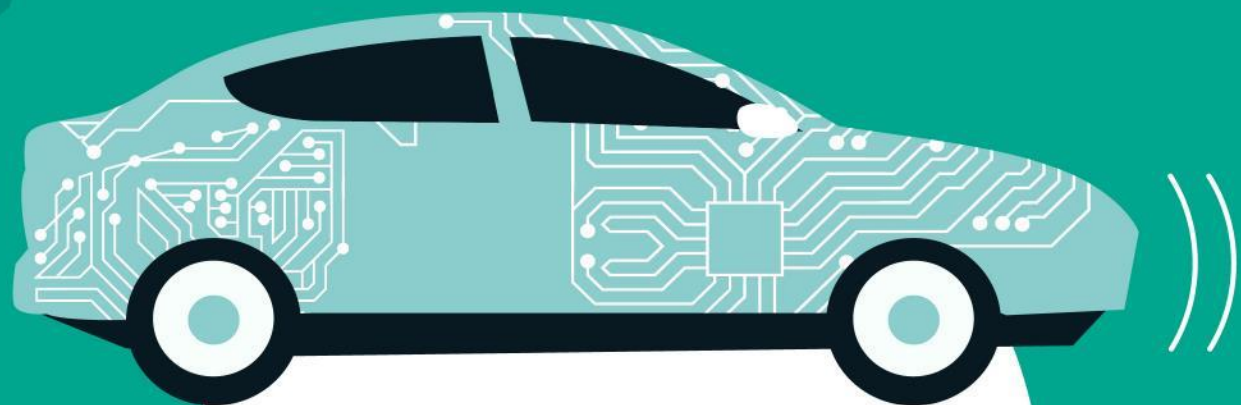


What are the two main reasons why your fleet is connected by Telematics?  
 Basis: companies with connected LCVs thanks to Telematics

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

TOTAL



Buying vehicles with native device relating to road safety on it

12 28

11 29

10 25

14 30

13 26

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

14 22

8 19

7 19

12 17

35 38

Real world driving style analysis

10 21

11 23

12 23

8 18

8 19

Smartphone blocking

9 18

9 21

9 20

9 16

8 12

E-learning

7 15

11 22

2 9

8 14

3 9

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



The logo for Arval Mobility Observatory, featuring the text "Arval Mobility Observatory" in a green, sans-serif font, enclosed within a green, stylized oval shape.

Arval Mobility  
Observatory

A close-up, low-angle shot of the side of a dark blue car, showing the front wheel and the lower part of the body. The car is parked on a gravel surface with yellow flowers. The background is a blurred scene of green trees under a bright sky.

**Thank you**



# APPENDIX

