



2018 FLEET BAROMETER

Europe 



2018 / Survey n°1700814

Table of content

I	FLEET PROFILE	p.15
II	FINANCING	p.48
III	TELEMATICS	p.70
IV	PERSPECTIVES IN TERMS OF CORPORATE MOBILITY	p.77

PERIMETER OF THE STUDY – FOCUS EUROPE



METHODOLOGY



**DATA COLLECTION
METHOD**



FIELDWORK PERIOD



TARGET



QUOTAS



SAMPLE



**DURATION OF
INTERVIEW**

CATI System
(Computer Assisted
Telephone Interviewing)



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

**Company size
& sector**

3 313 interviews
through Europe

10 minutes
on average

SAMPLE FOR EUROPE

Perimeter of the survey: companies owning at least 1 vehicle



Companies with less than 10 employees
1 093 interviews



Companies with 10 to 99 employees
677 interviews



Companies with 100 to 249 / 499 / 999 employees
883 interviews







Companies with 250 / 500 / 1 000 employees and more
660 interviews

**1 to 99
employees
1 770 interviews**

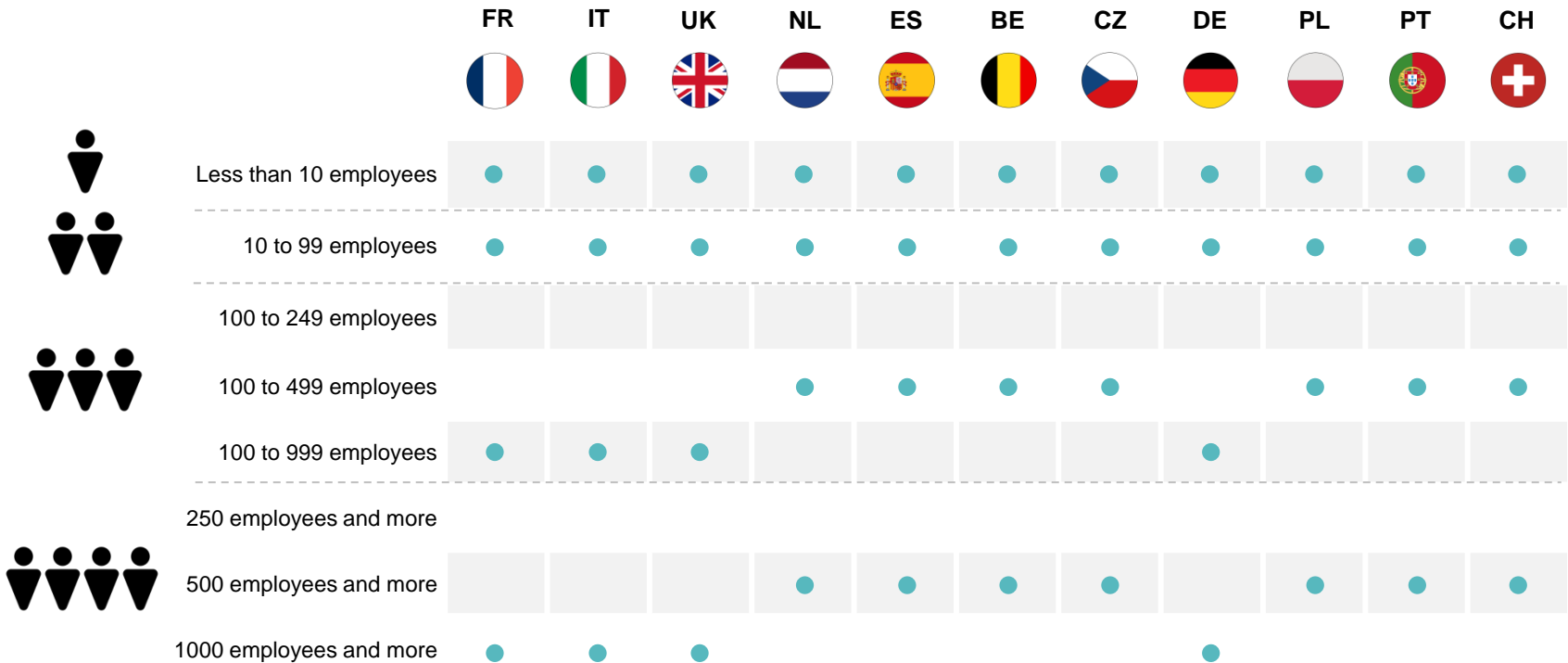
**100 employees
and more
1 543 interviews**

NUMBER OF INTERVIEWS CONDUCTED IN EUROPE

Company size & sector					Total
Construction	211 (19%)	113 (17%)	90 (10%)	42 (6%)	456 (14%)
Industry	196 (18%)	218 (33%)	361 (41%)	244 (37%)	1 018 (31%)
Services	418 (38%)	194 (29%)	268 (31%)	269 (41%)	1 148 (35%)
Trade	274 (25%)	142 (21%)	157 (18%)	104 (16%)	677 (21%)
TOTAL	1 093 (100%)	677 (100%)	883 (100%)	660 (100%)	3 313 (100%)
Weight of each company size segment	33%	20%	27%	20%	100%

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

SAMPLE



PICTOGRAMS

Company size



Less than 10 employees



10 – 99 employees



100 to 249 / 499 / 999 employees



250 / 500 / 1000 employees
and more

Fleet size*



1 – 9 vehicles



10 – 49 vehicles



50 vehicles and more



* **Fleet size**: the size of the fleet has been defined according to the total number of vehicles given in question A5.



MAIN RESULTS

MAIN RESULTS

#1

Companies are embracing the shift to new powertrain technologies. The adoption of **alternative energies** will accelerate among large and very large companies but also small and medium-sized companies which are now considering this as well.



#2

The aforementioned evolution will impact the companies' uses and attitudes in terms of mobility services. The introduction of Car Sharing and Ride Sharing as a service has entered into the daily business life.



#3

A redefinition of the mobility needs in which the fleet vehicle will remain a central tool. At a glance, the business sees the future of fleet as bright and the companies **confidence** is strong an **growth** of their **fleets size**.



#4

Operational leasing remains the **preferred solution** to support the development of fleets of large and very large companies but is also increasingly considered by the SME segment.



MAIN RESULTS

#1

ALTERNATIVES ENERGIES

In the current transition period with the incoming of WLTP, key themes and points of interest of this year are growth expectations for alternative vehicles and alternative mobility services in the broader sense.

If yesterday almost all fleet vehicles were running on diesel, this 2018 survey shows that the landscape is changing: 30% of very large companies have already switched to electric vehicles and 27% to hybrids. Large and very large companies also say that they want to accelerate the movement in the coming years ... small and medium-sized companies will not be left out since they plan to follow the movement, as evidenced by the following figures:

- respectively 68% and 48% of very large and large companies have already or plan to integrate in their live fleets alternative energies (HEV, PHEV, BEV, CNG, LPG or Hydrogen)
- this value remains high even among small businesses since this concerns 32% of them.



The leading countries to implement such changes are Belgium, UK, the Netherlands and Switzerland.

More and more car policies are opened to alternative energies now that the TCO of those is closing in on combustion engine based models. This is facilitated by local government's fiscal policies, but also because lessors are more confident than before about residual values of particularly the batteries powering full electric vehicles, as well as their remaining capacity after a first full cycle of experience. The key remaining points of attention of battery powered alternatives are the charging infrastructure and having enough comfort about their true range in varying circumstances.

MAIN RESULTS



Lessors are helping their clients to make the right strategic and tactical choices for future powertrain choices during this challenging transitional period, during which OEMs need to adapt their models to ever more challenging European norms around CO₂ and NOx emissions. Corporates are also more and more conscious of their direct impact on the environment in the broader sense and thus CSR objectives are progressively more integrated into corporate fleet strategies.

The new **WLTP** test is already largely taken into account by large and very large companies in the definition of their car policies (respectively 46% and 62% of them). Small and medium-sized companies intend also to take into account these new values issued from this new protocol in their results over the next 3 years. It is obvious that the CO₂ emission rate is taken into account to define part of the rules of the company car policies, but the corporates also tell us to be sensitive to NOx and fine particles even if they don't have the possibility to fix the numerical caps as it is the case for CO₂.

Having enough benchmarking insights readily available on alternative strategies, but also on fuel spend and more broadly on the TCO of existing and new vehicle models, is the expertise that corporate fleet managers and decision makers welcome and appreciate nowadays to come from their lessors.



MAIN RESULTS

#2

MOBILITY SERVICES

The interest of fleet managers for mobility services to be implemented in their company is on the increase.

Car Sharing and Ride sharing as a service are one of the major topics of interest for fleet managers. As for the implementation of alternative energy vehicles, 44% of the fleet managers are considering or have already implemented one of these two services in their companies. Mobility budget management is also a service in a few countries that fleet managers are considering more and more.

This concerns about half to one-third of very large and large businesses. The most advanced countries in this field are Belgium, Switzerland, the Netherlands, France and United Kingdom.



The share of companies that have integrated telematics tools into their fleets is also a proof of the evolution of the way of apprehending the needs in terms of mobility. A large proportion of large and very large companies (almost a third) have already equipped all or part of their fleets with telematics tools. This rate reaches almost half of the large and very large companies in countries like the Netherlands, Poland or UK. Today, these tools are mainly used for real-time vehicle location, but also to optimize the fleet TCO or to improve drivers' behaviour and resulting safety.



MAIN RESULTS

#3

FLEET GROWTH



Every year, we measure and find that business confidence is increasing with respect to the growth of their fleet. Our indicator increased by 1 point on the two previous years and by 2 points on the last measure. The largest companies are the ones that express the highest level of confidence in the future.

Today we reach high levels of confidence:

- For the very large companies, 27% anticipate an increase of their fleets size versus only 9% who anticipate a contraction
- For the smallest companies, the share of companies anticipating a rise is also greater: 13% versus only 4% who anticipate a decline

More specifically, the countries where large and very large companies are the most confident are Belgium, Spain, France and Italy. For small and medium-sized corporates, the most confident in the future are in the UK.



#4

FINANCING SOLUTIONS

Operational leasing is the solution most often preferred by large and very large companies: 38% of large companies and 51% of very large companies have declared that Full Service Leasing is the main source of funding for their vehicle fleets. These values are stable over time. On the other hand, in the case of smaller companies, we see a change: over the past 3 years; the part of companies using Operational Leasing as a financing fleet vehicles mode has increased from 9% to 12% for small businesses and from 17% to 21% for medium-sized corporates.





I - FLEET PROFILE

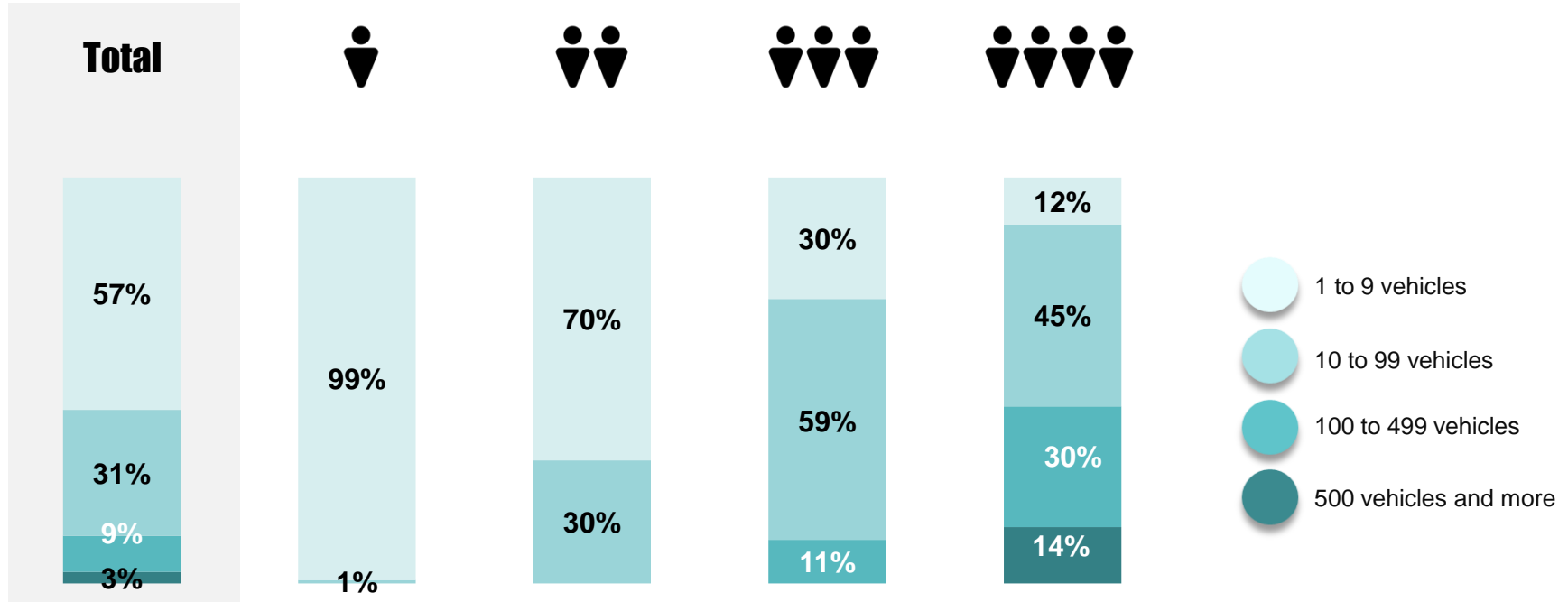


I - FLEET PROFILE

A. FLEET CHARACTERISTICS

NUMBER OF VEHICLES IN FLEET

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



NUMBER OF VEHICLES IN FLEET



	EU	FR	IT	UK	NL	ES	BE	CZ	DE	PL	PT	CH
1 to 9 vehicles	88%	86%	95%	88%	85%	86%	84%	84%	88%	91%	88%	92%
10 to 99 vehicles	12%	14%	5%	11%	15%	14%	16%	16%	12%	9%	12%	8%
100 to 499 vehicles	< 1%	-	-	1%	-	1%	-	-	-	-	-	-



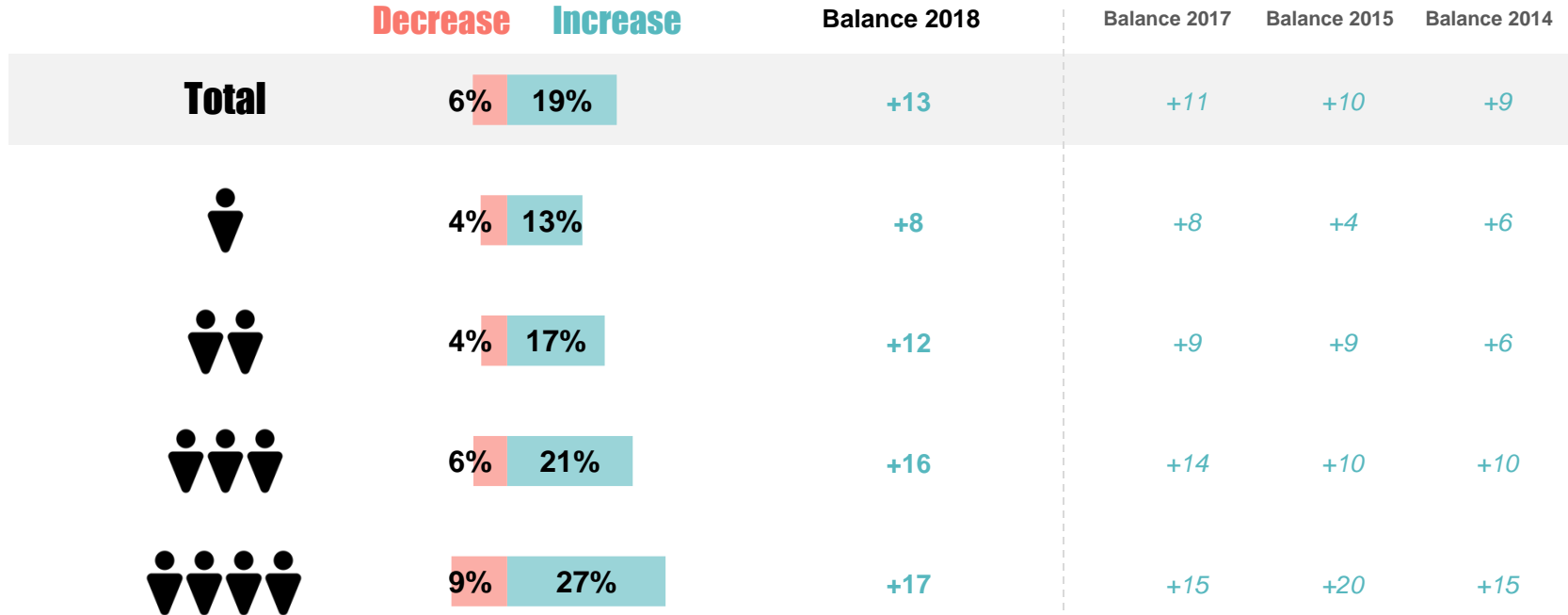
1 to 9 vehicles	22%	18%	34%	17%	22%	11%	6%	31%	16%	26%	28%	32%
10 to 99 vehicles	53%	43%	45%	49%	54%	51%	45%	59%	59%	64%	55%	57%
100 to 499 vehicles	19%	25%	17%	24%	19%	27%	39%	7%	20%	8%	13%	9%
500 vehicles and more	6%	13%	4%	10%	4%	10%	11%	2%	4%	3%	4%	1%

FLEET GROWTH POTENTIAL

by company size

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

% which think that the total number of vehicles of their company fleet will increase or decrease



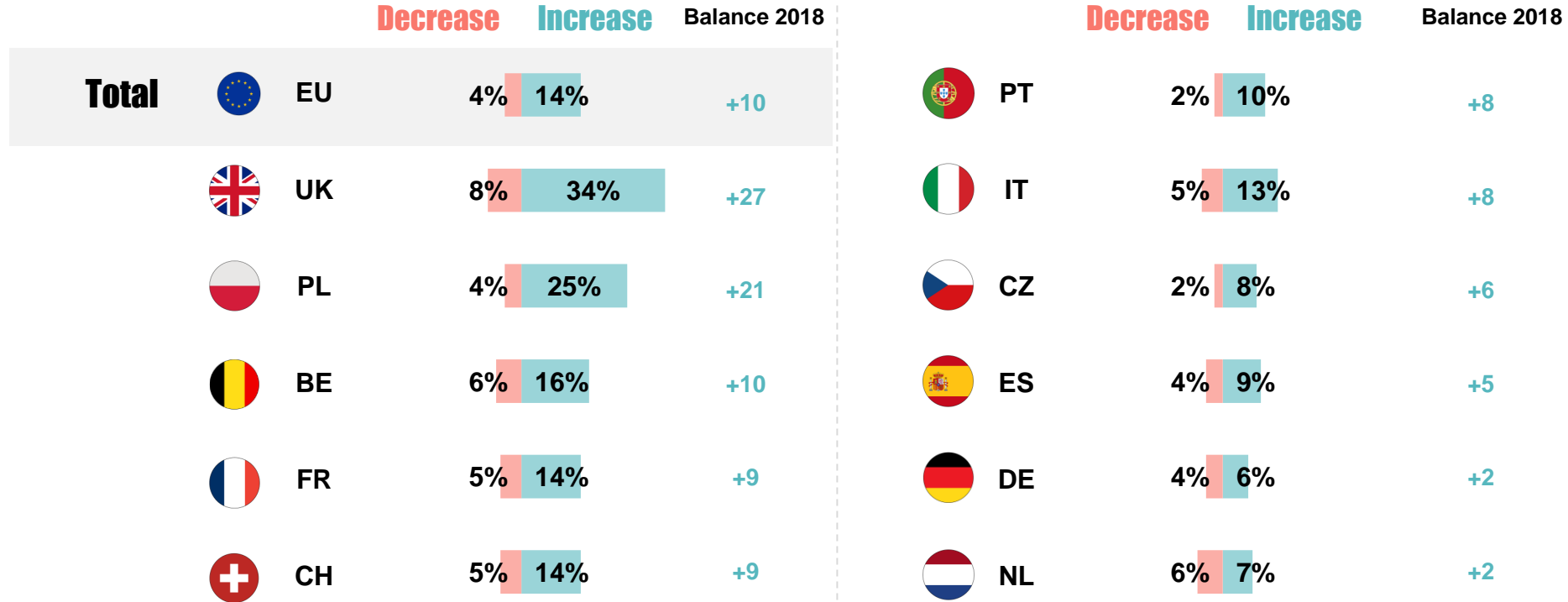
FLEET GROWTH POTENTIAL

by company size



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

% which think that the total number of vehicles of their company fleet will increase or decrease



Balance = Fleet growth will increase – Fleet growth will decrease

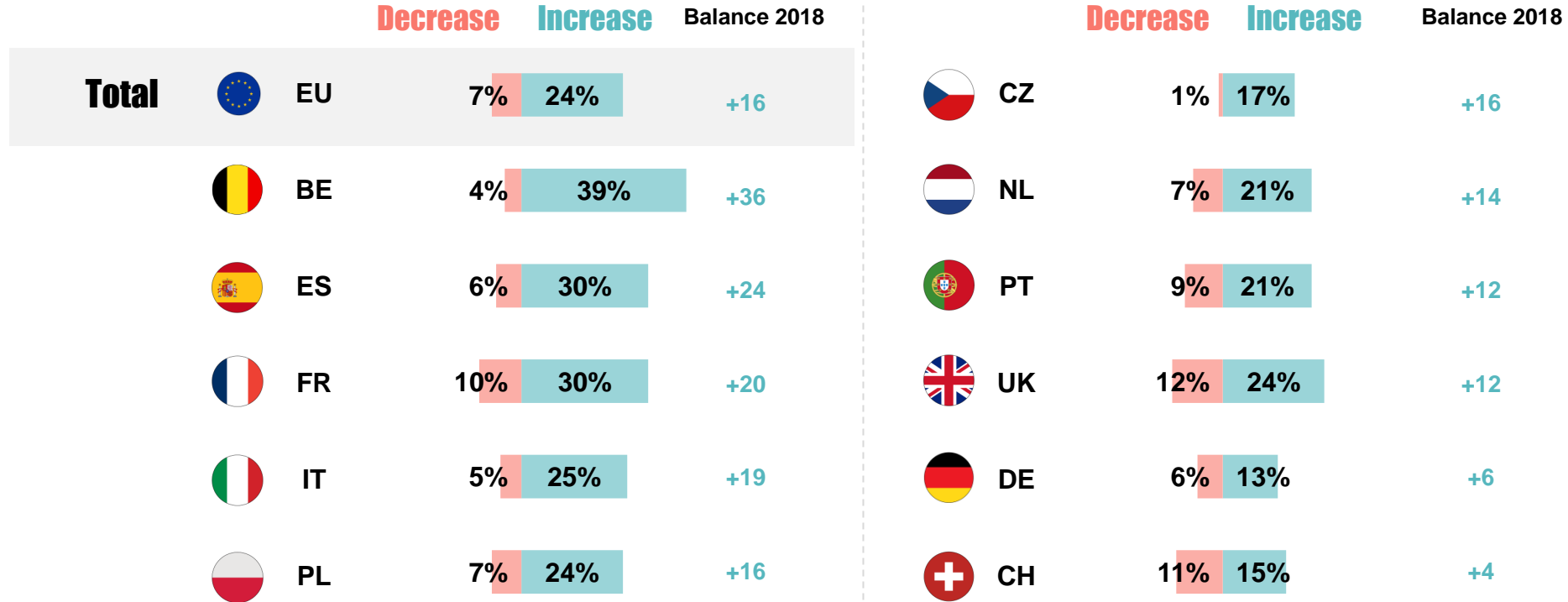
FLEET GROWTH POTENTIAL

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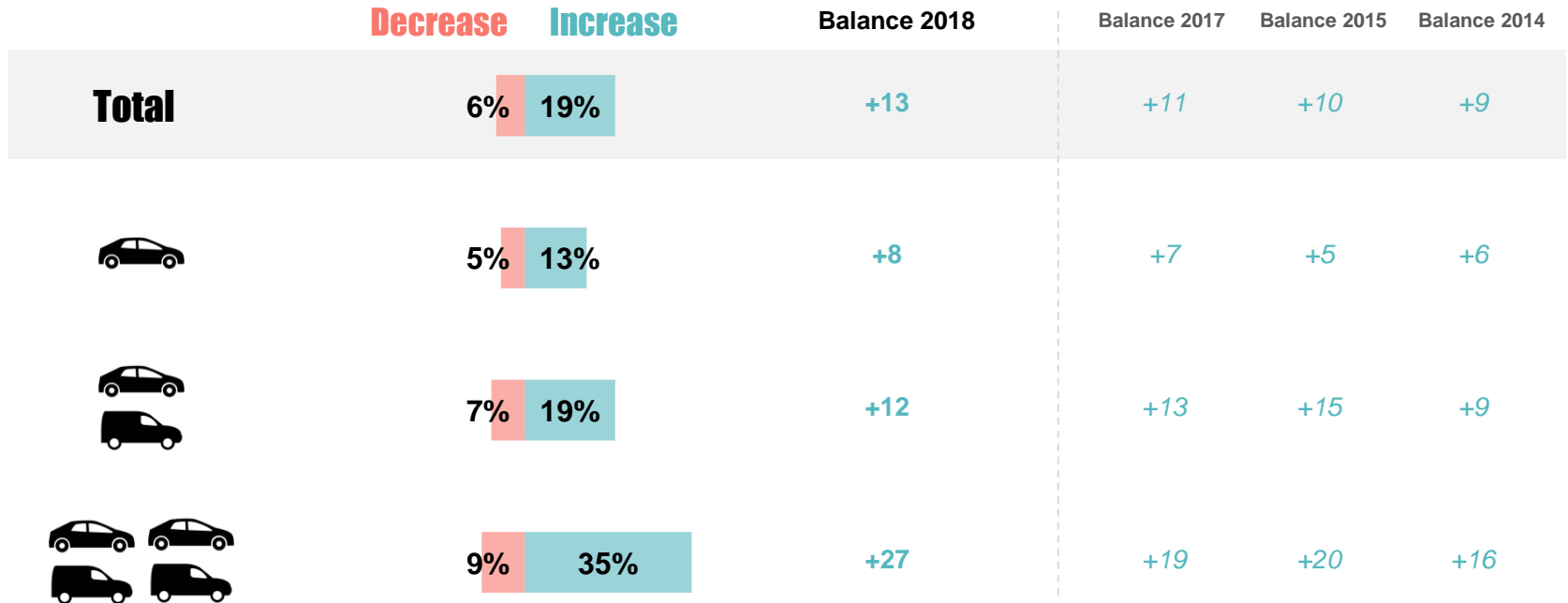


FLEET GROWTH POTENTIAL

by fleet size

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

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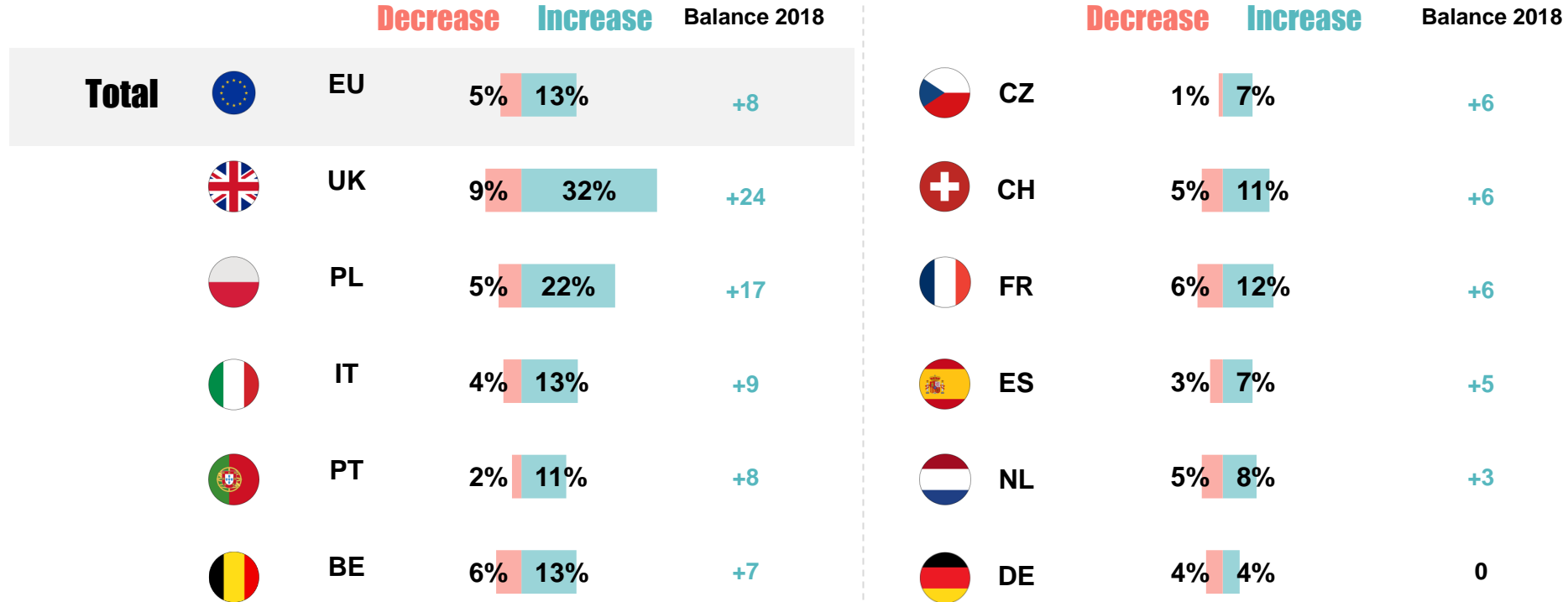
FLEET GROWTH POTENTIAL

by fleet size



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

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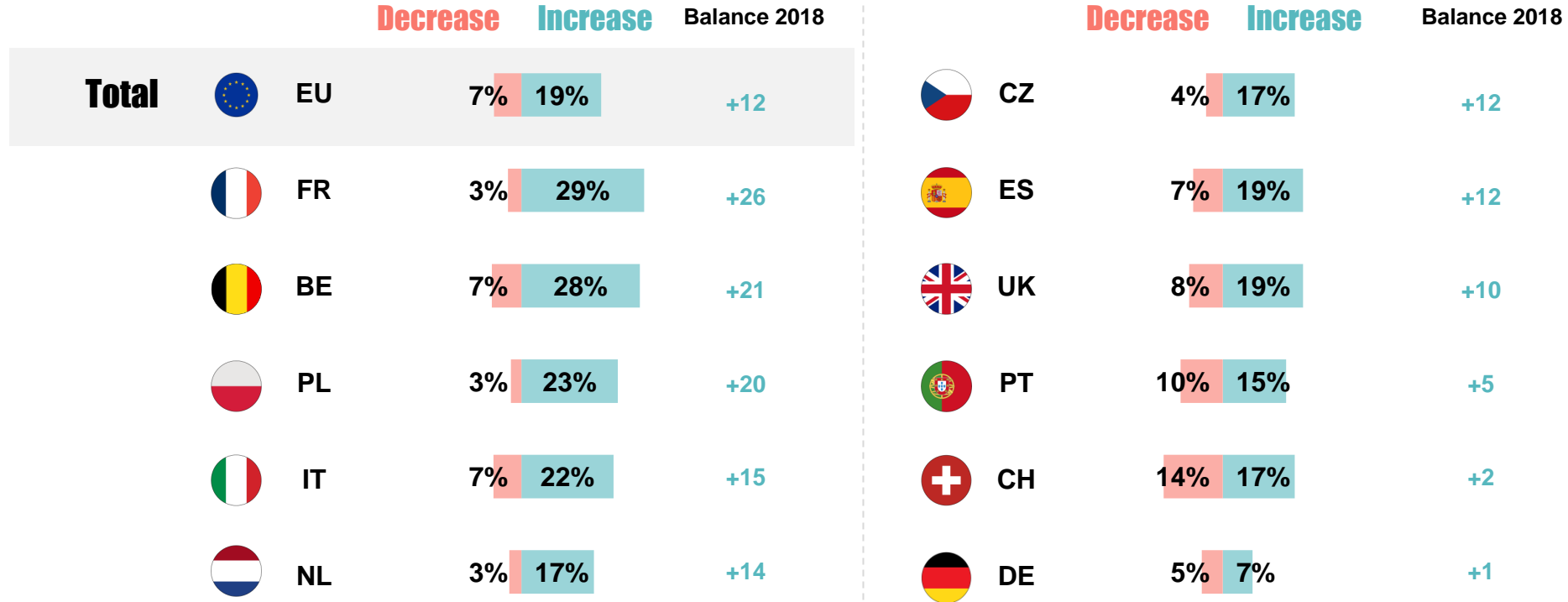
FLEET GROWTH POTENTIAL

by fleet size



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

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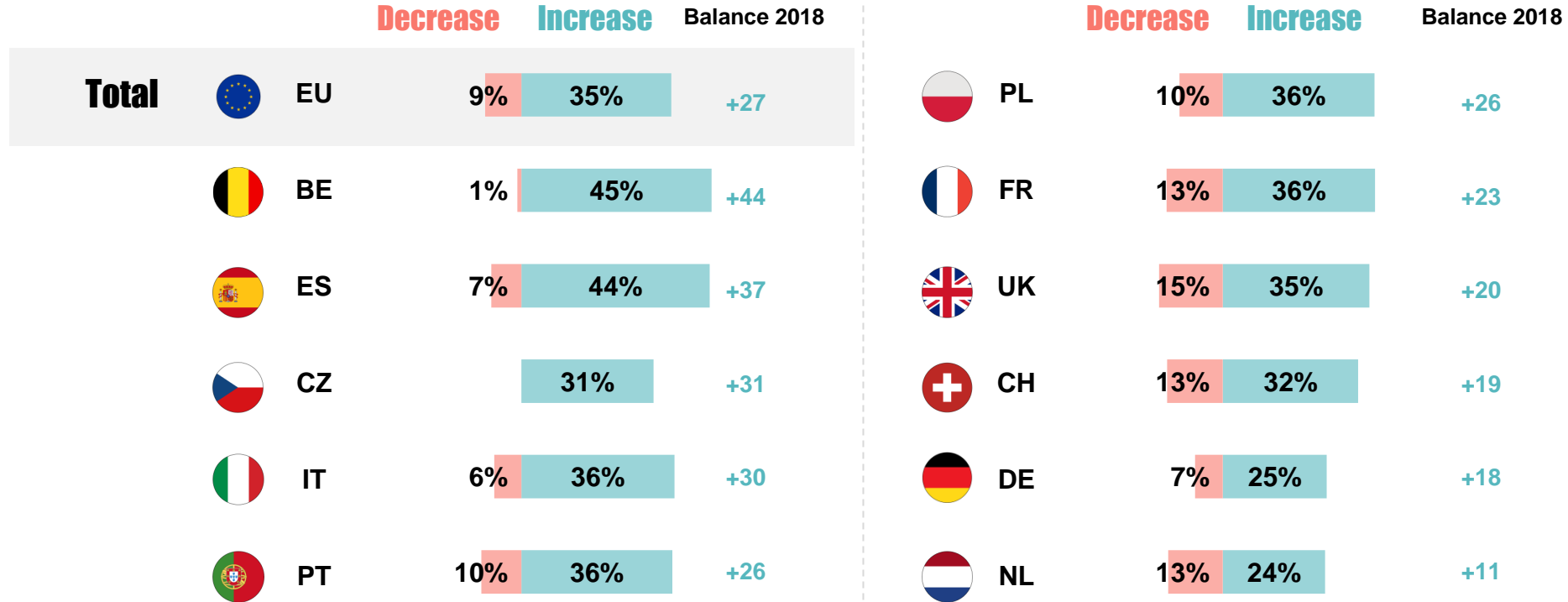
FLEET GROWTH POTENTIAL

by fleet size



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

% which think that the total number of vehicles of their company fleet will increase or decrease



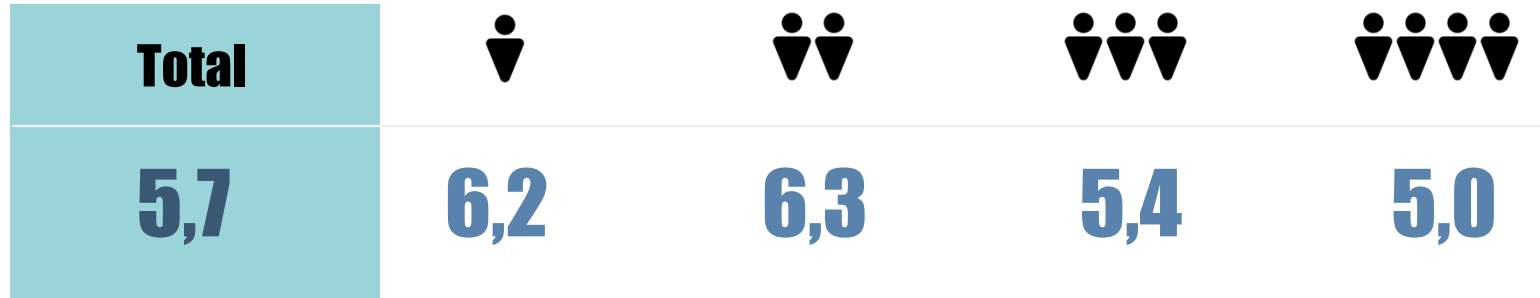
Balance = Fleet growth will increase – Fleet growth will decrease

HOW LONG THE COMPANY KEEPS ITS VEHICLE

by company size

On average, how long do you keep your vehicles before being sold (new precision added for the 2018 questionnaire) or giving back to the leasing company?

Average in years



HOW LONG THE COMPANY KEEPS ITS VEHICLE

by company size

On average, how long do you keep your vehicles before being sold (new precision added for the 2018 questionnaire) or giving back to the leasing company?

Average in years



Total



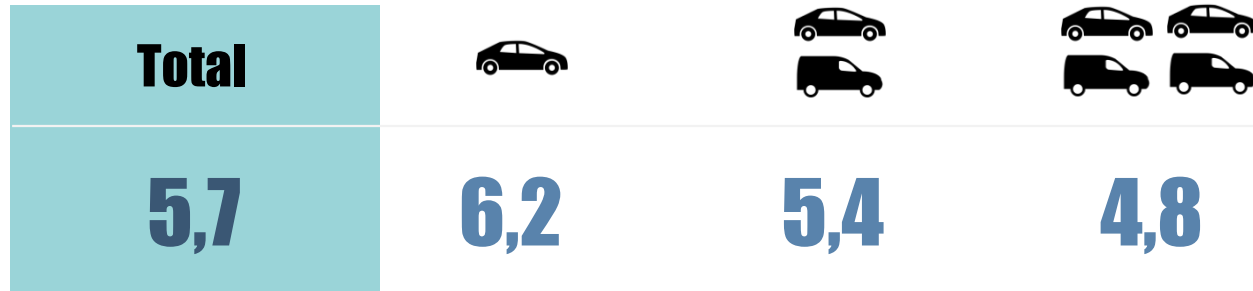
	EU	CH	IT	PL	PT	NL	CZ	ES	BE	DE	FR	UK
Total	5,7	7,5	6,6	6,5	6,5	5,7	5,7	5,3	5,2	5,1	4,9	3,9
2 people	6,3	7,6	7,7	6,7	6,8	6,1	5,7	6,2	5,6	5,9	6,1	4,0
4 people	5,2	7,4	5,3	6,4	6,1	5,3	5,7	4,4	4,7	4,1	3,7	3,9

HOW LONG THE COMPANY KEEPS ITS VEHICLE

by fleet size

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Total	5,7	7,5	6,6	6,5	6,5	5,7	5,7	5,3	5,2	5,1	4,9	3,9
	6,2	7,8	7,5	6,8	6,6	5,9	5,6	6,3	5,5	5,9	5,8	3,9
	5,4	6,9	5,6	6,4	7,0	4,8	6,3	4,8	5,0	4,3	4,1	3,6
	4,8	7,4	4,3	5,5	5,0	6,4	4,7	3,9	4,8	3,8	3,8	4,2



I - FLEET PROFILE

B. ENERGY MIX

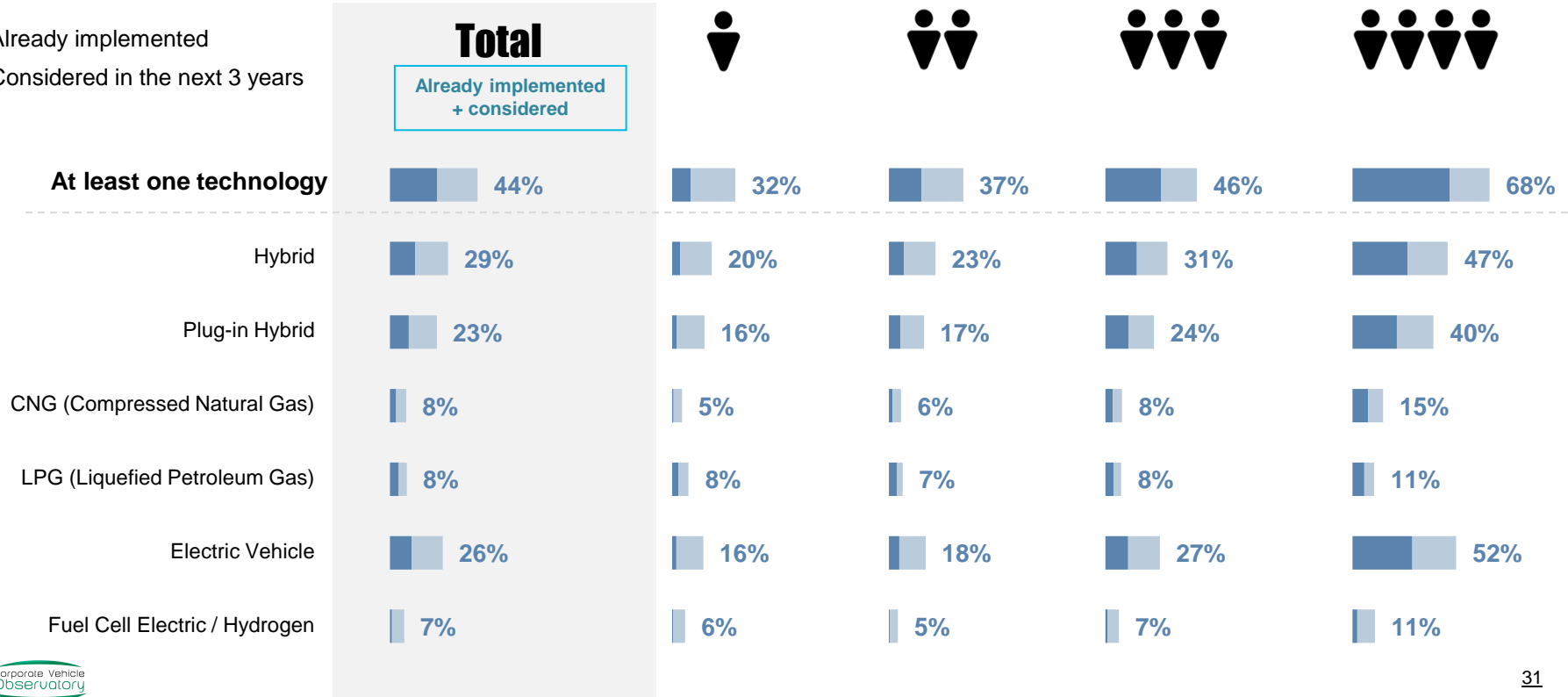
DEVELOPMENT POTENTIAL OF NEW ENERGIES OR TECHNOLOGIES - by company size

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

Proportion of companies having already or considering to implement in the next 3 years new energies or technologies in their fleet (in at least one of their fleet vehicles)

Already implemented

Considered in the next 3 years



DEVELOPMENT POTENTIAL OF NEW ENERGIES OR TECHNOLOGIES - by fleet size

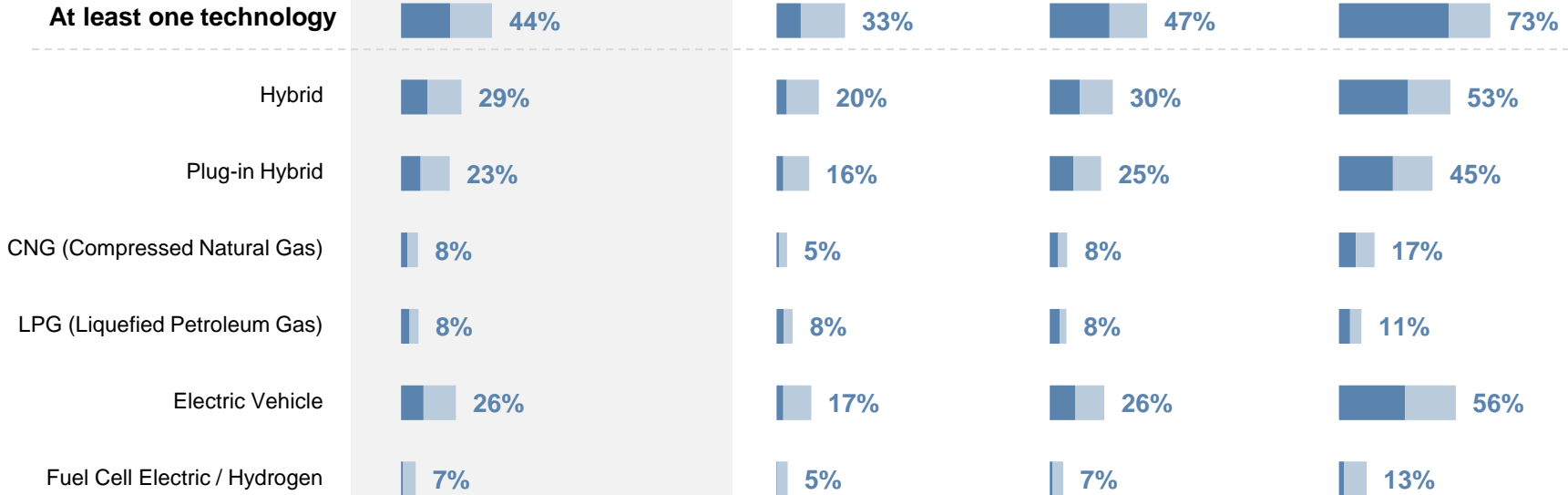
Amongst the following technologies, which one do you consider to use?

Proportion of companies having already or considering to implement in the next 3 years new energies or technologies in their fleet

Already implemented

Considered in the next 3 years

Total
Already implemented + considered

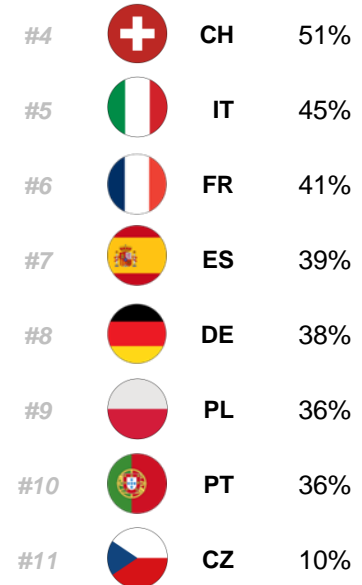
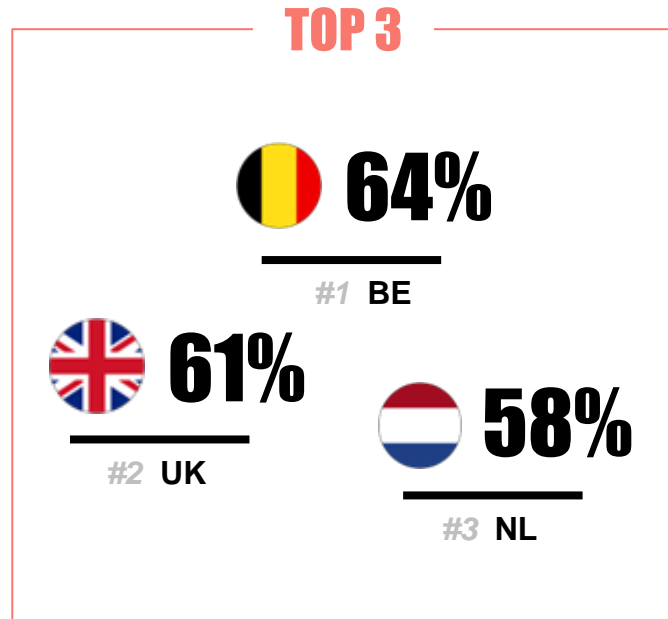
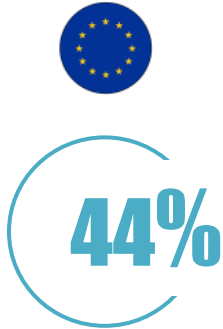


DEVELOPMENT POTENTIAL OF NEW ENERGIES OR TECHNOLOGIES: *At least one technology*

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

Proportion of companies having already or considering to implement in the next 3 years new energies or technologies in their fleet (hybrid, plug-in hybrid, CNG, LPG, electric vehicle or fuel cell electric / hydrogen)

**% Already implemented
+ considered in the next 3 years**

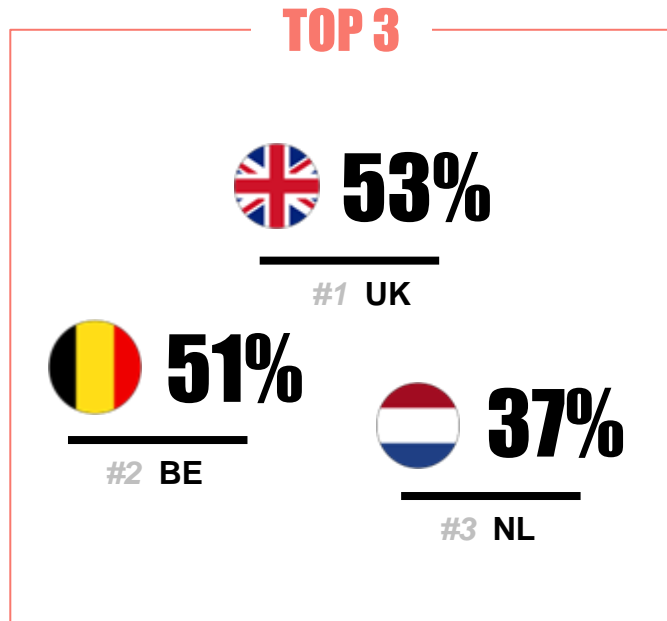


HYBRID DEVELOPMENT POTENTIAL

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

Proportion of companies having already or considering to implement in the next 3 years hybrid technology in their fleet

% Already implemented
+ considered in the next 3 years

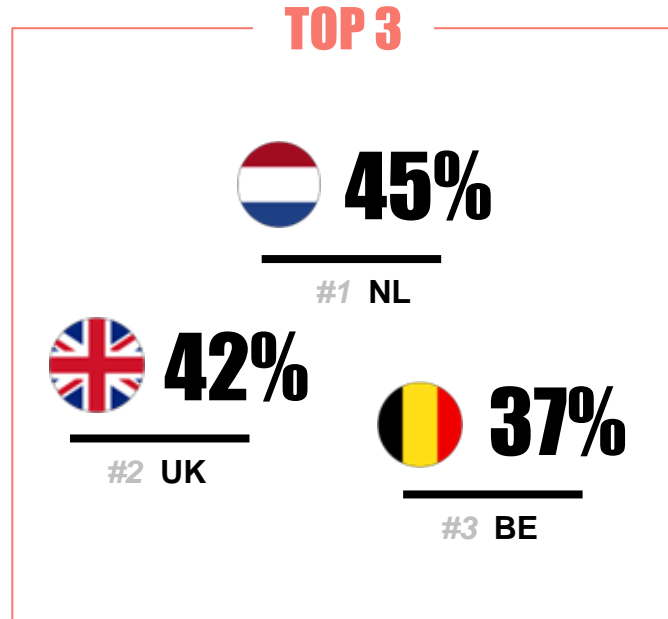
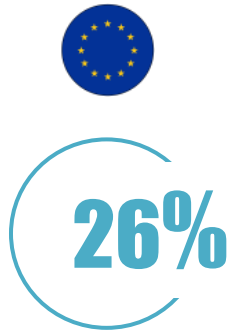


ELECTRIC VEHICLE DEVELOPMENT POTENTIAL

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

Proportion of companies having already or considering to implement in the next 3 years electric vehicle technology in their fleet

% Already implemented
+ considered in the next 3 years

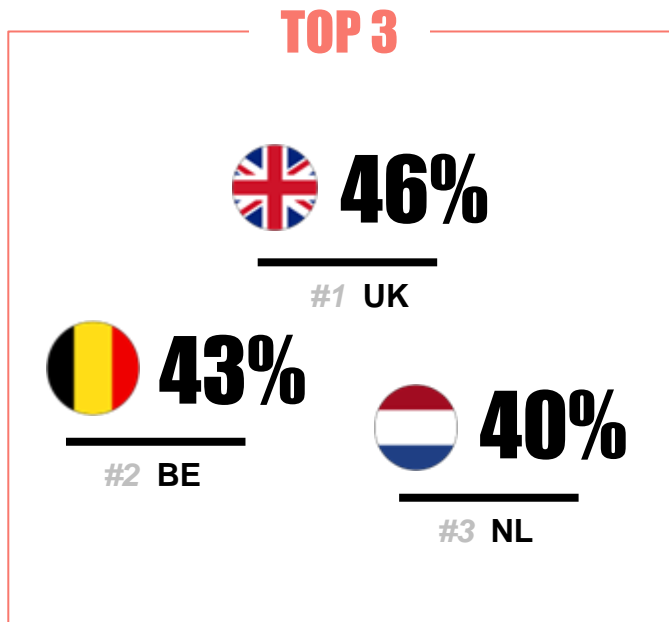
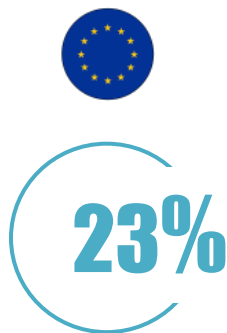


PLUG-IN HYBRID DEVELOPMENT POTENTIAL

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

Proportion of companies having already or considering to implement in the next 3 years plug-in hybrid technology in their fleet

% Already implemented
+ considered in the next 3 years

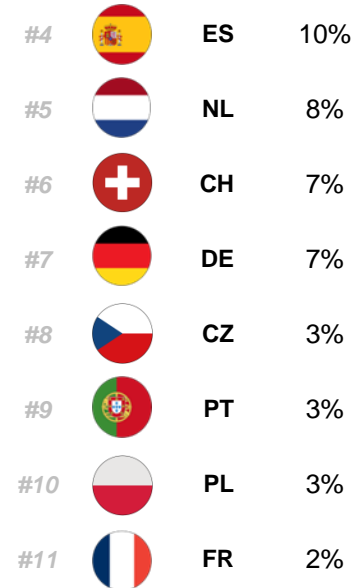
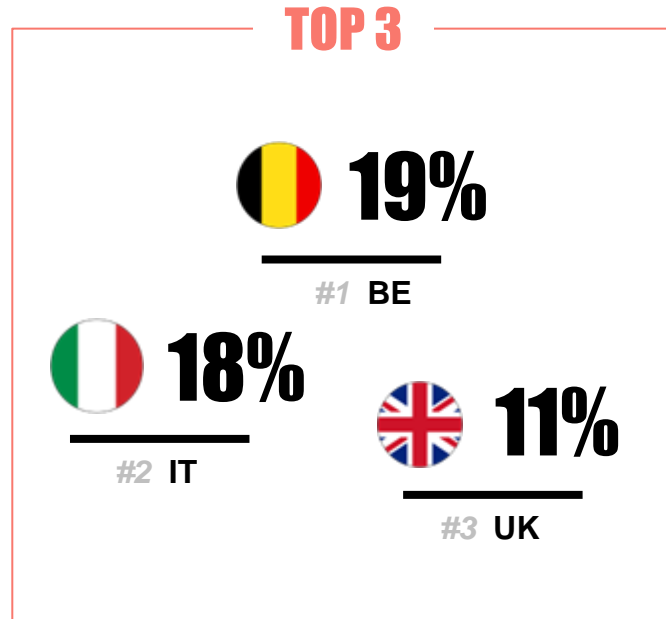


CNG / COMPRESSED NATURAL GAS DEVELOPMENT POTENTIAL

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

Proportion of companies having already or considering to implement in the next 3 years CNG (compressed natural gas) technology in their fleet

% Already implemented
+ considered in the next 3 years

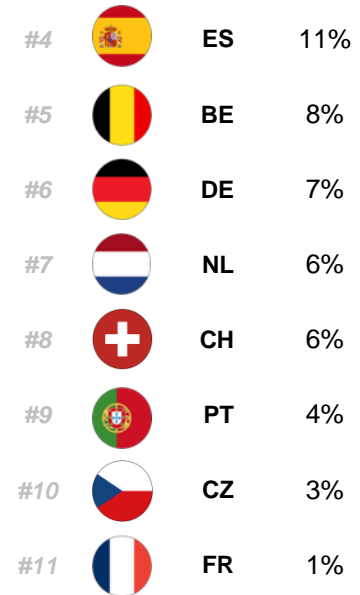
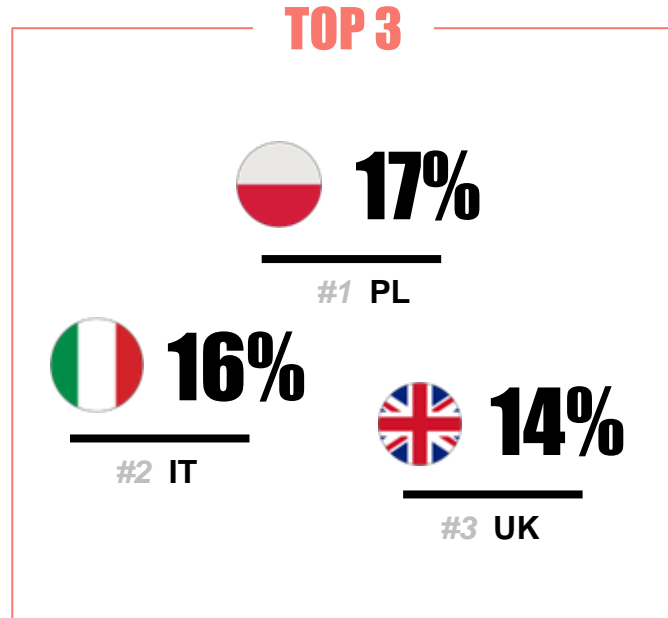


LPG / LIQUEFIED PETROLEUM GAS DEVELOPMENT POTENTIAL

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

Proportion of companies having already or considering to implement in the next 3 years LPG (liquefied petroleum gas) technology in their fleet

% Already implemented
+ considered in the next 3 years

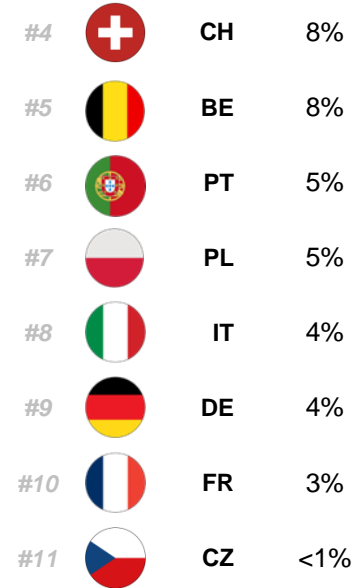
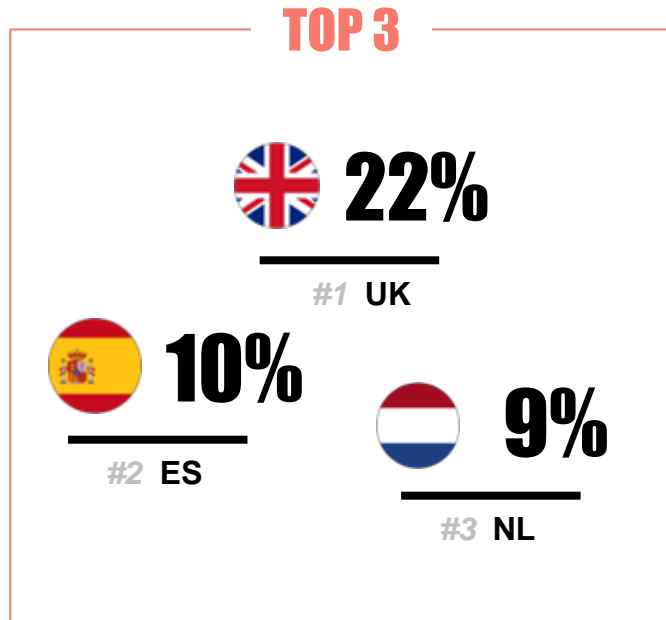


FUEL CELL ELECTRIC / HYDROGEN DEVELOPMENT POTENTIAL

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

Proportion of companies having already or considering to implement in the next 3 years fuel cell electric / hydrogen technology in their fleet

% Already implemented
+ considered in the next 3 years

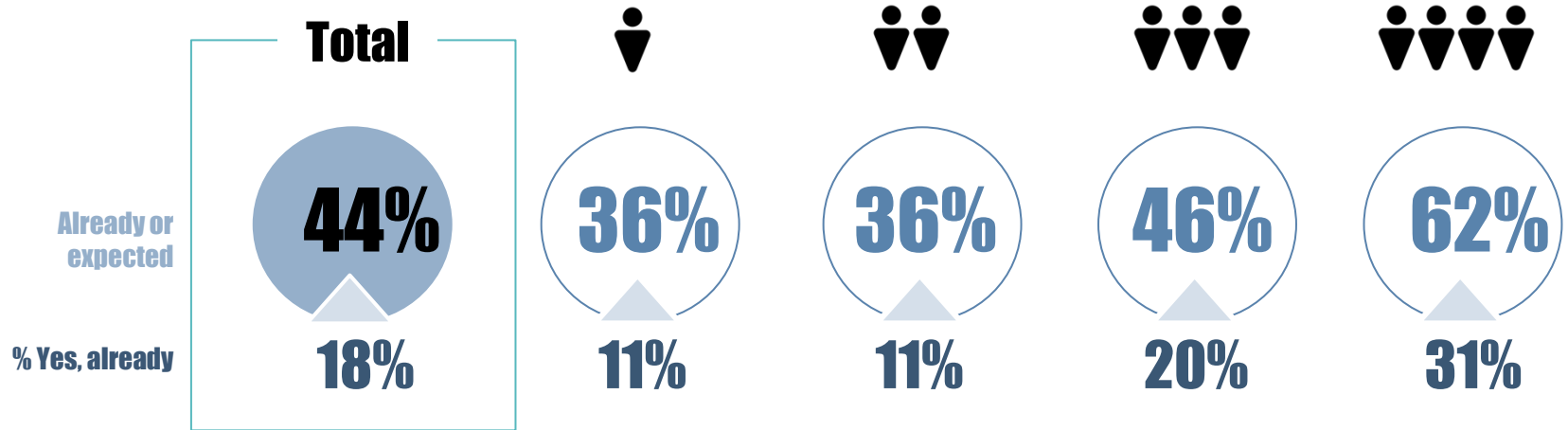


IMPACT OF THE WLTP TEST

by company size

Today, fuel consumption and CO2 emissions are determined with a new, more realistic test cycle: the WLTP-test. Has, or will the new higher and more realistic fuel consumption levels and related CO2 emissions impact on your fleet policy?

Proportion of companies having already or expecting to be impacted in the next 3 years by the new WLTP test

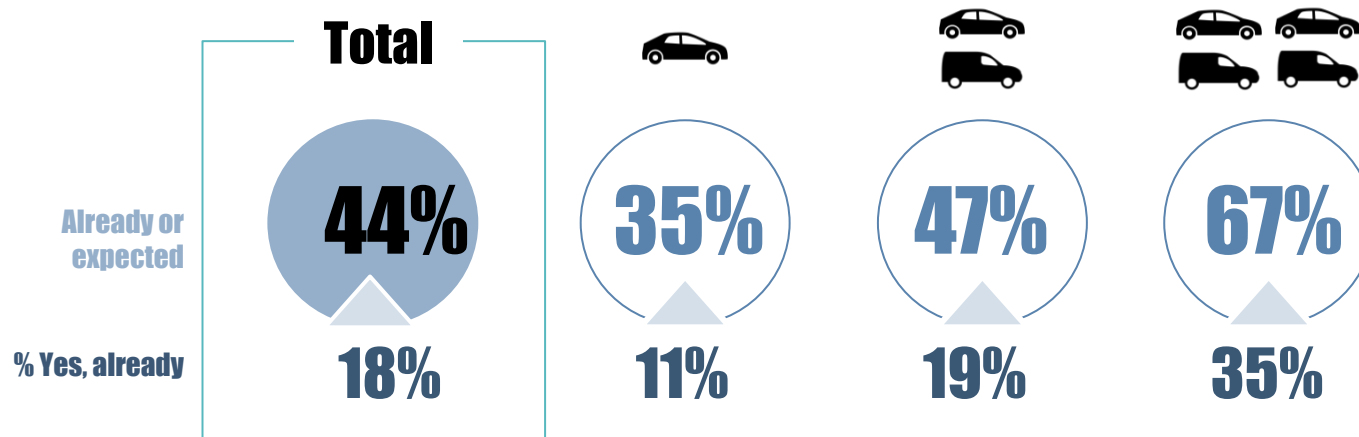


IMPACT OF THE WLTP TEST

by fleet size

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Proportion of companies having already or expecting to be impacted in the next 3 years by the new WLTP test



IMPACT OF THE WLTP TEST

Today, fuel consumption and CO2 emissions are determined with a new, more realistic test cycle: the WLTP-test. Has, or will the new higher and more realistic fuel consumption levels and related CO2 emissions impact on your fleet policy?

Proportion of companies having already or expecting to be impacted in the next 3 years by the new WLTP test

% Already implemented
+ expected to be impacted in the
next 3 years



44%

TOP 3

 **69%**









#1 BE

 **57%**

#2 PT

 **53%**

#3 UK

#4		PL	51%
#5		ES	47%
#6		FR	47%
#7		NL	46%
#8		CH	44%
#9		IT	37%
#10		CZ	16%
#11		DE	16%

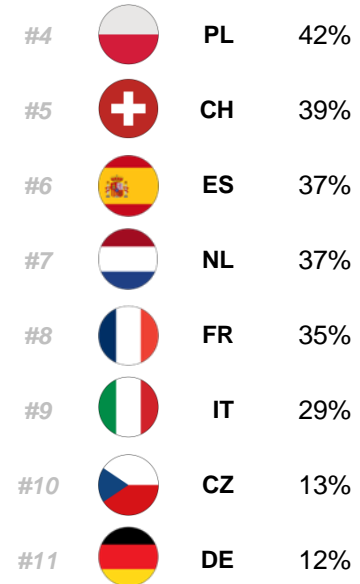
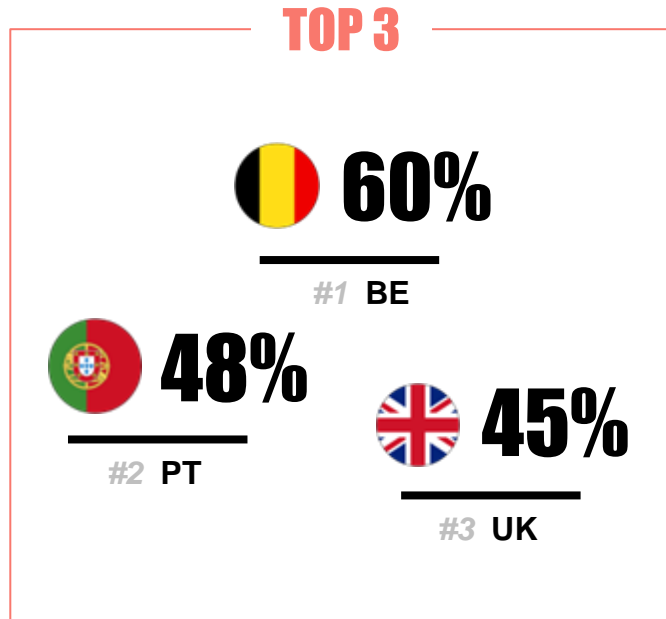
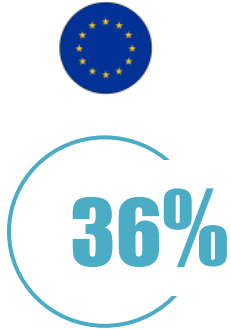
IMPACT OF THE WLTP TEST

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Proportion of companies having already or expecting to be impacted in the next 3 years by the new WLTP test



% Already implemented
+ considered in the next 3 years



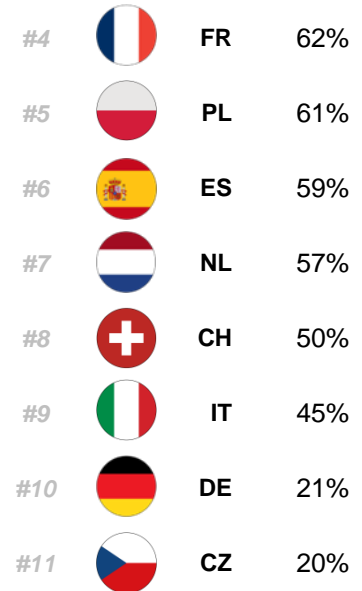
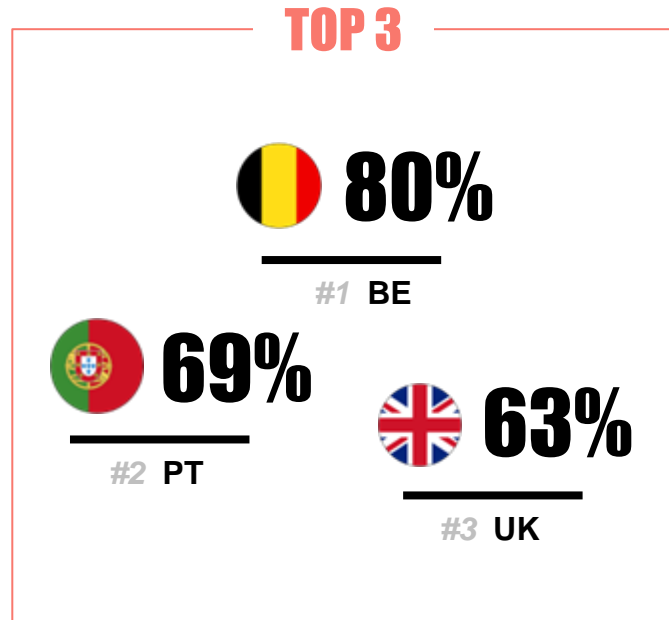
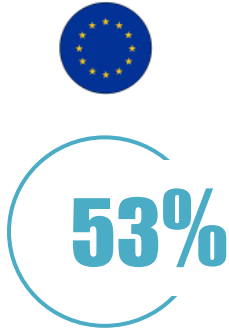
IMPACT OF THE WLTP TEST

Today, fuel consumption and CO2 emissions are determined with a new, more realistic test cycle: the WLTP-test. Has, or will the new higher and more realistic fuel consumption levels and related CO2 emissions impact on your fleet policy?

Proportion of companies having already or expecting to be impacted in the next 3 years by the new WLTP test



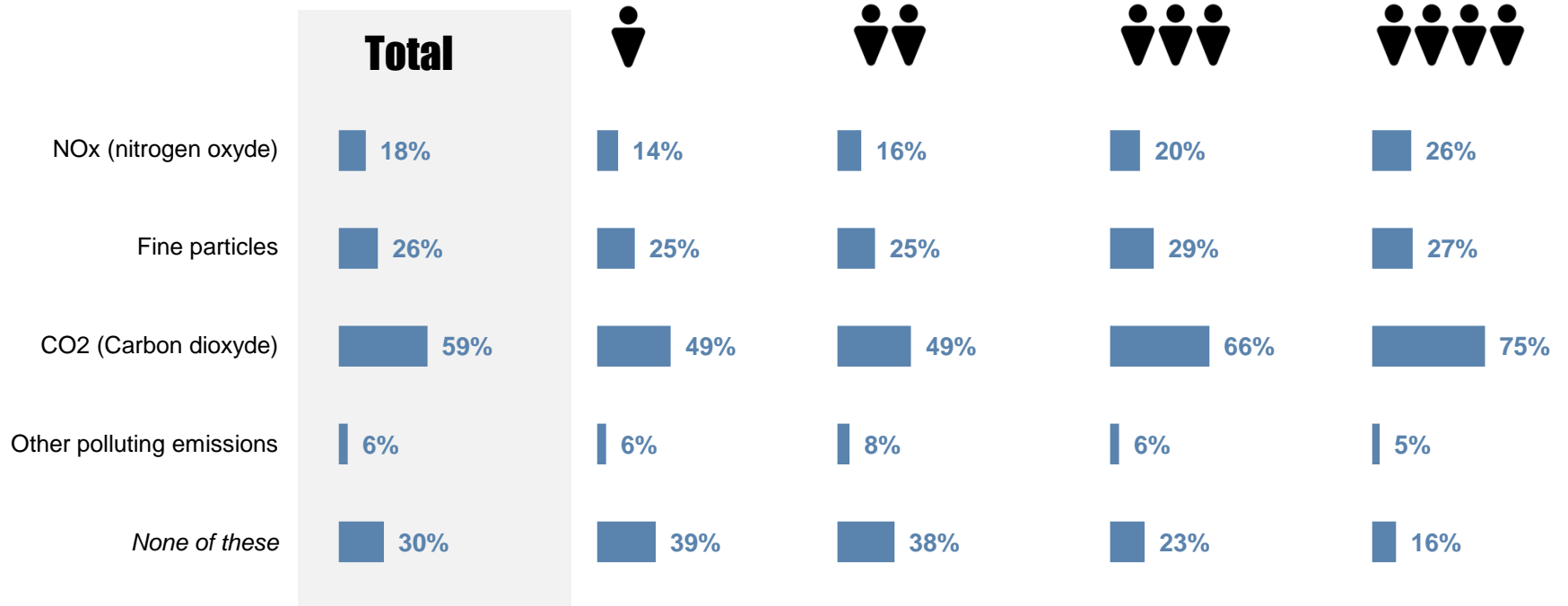
% Already implemented
+ considered in the next 3 years



EMISSIONS TAKEN INTO ACCOUNT IN THE CAR POLICY

Which of the following emissions do you take into account in your company car policy?

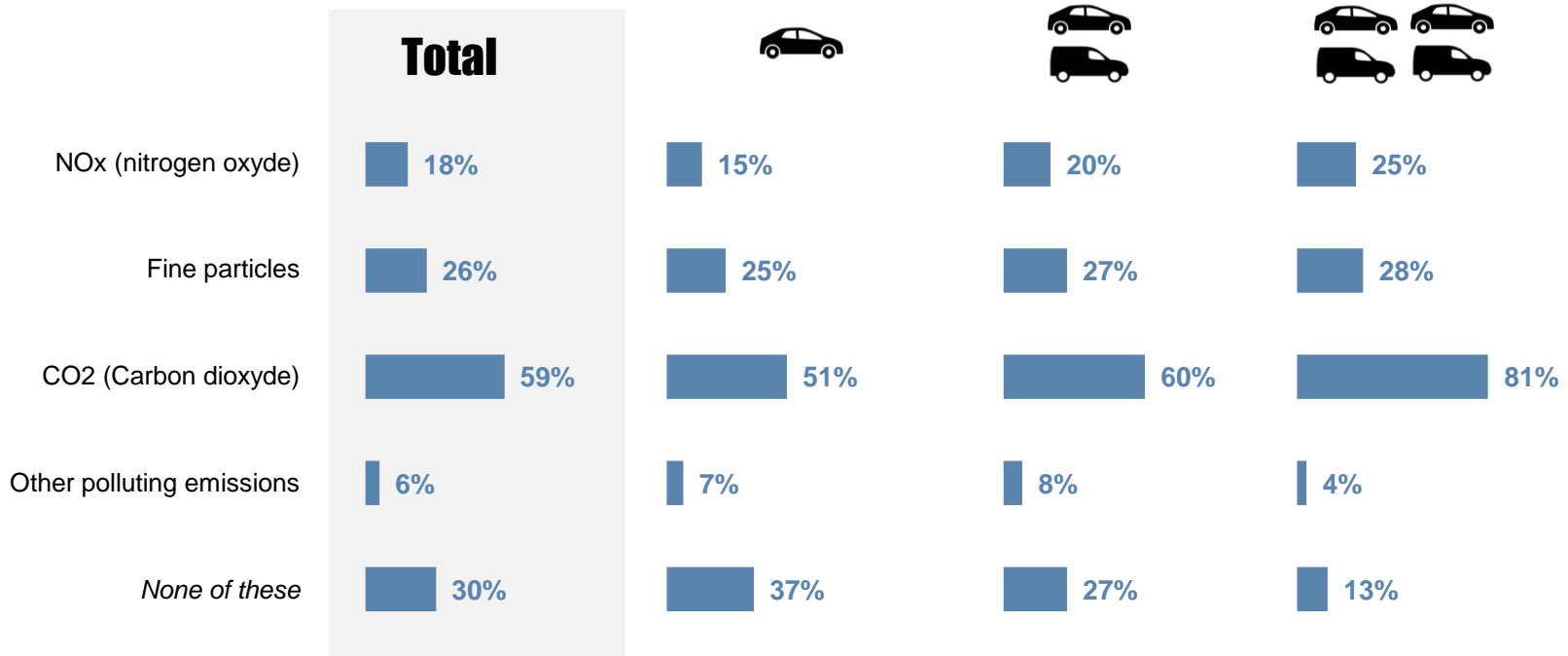
Proportion of companies taking into account the following pollutant emission in their fleet policy



EMISSIONS TAKEN INTO ACCOUNT IN THE CAR POLICY

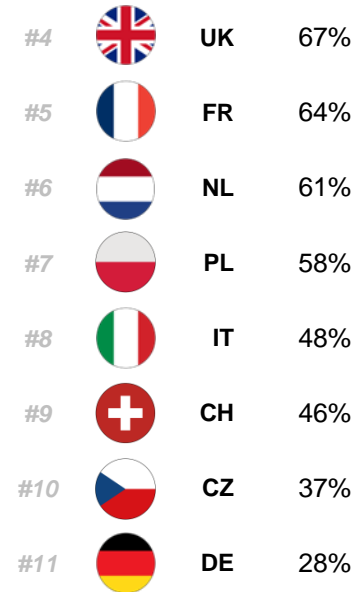
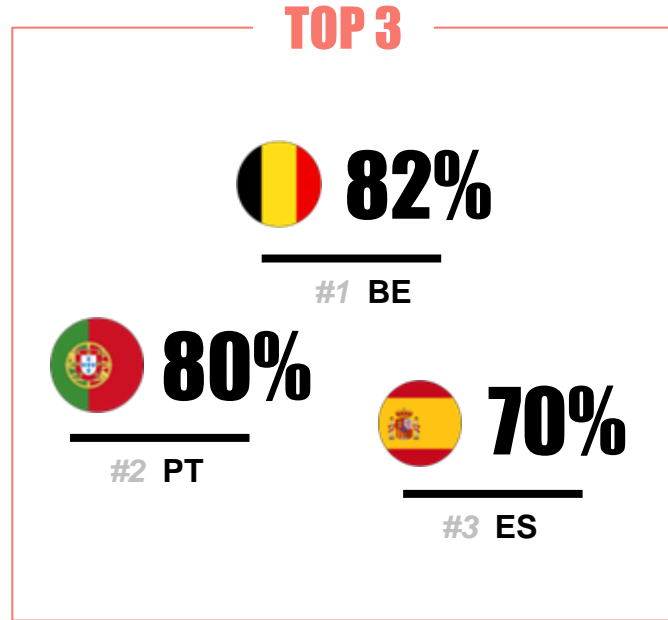
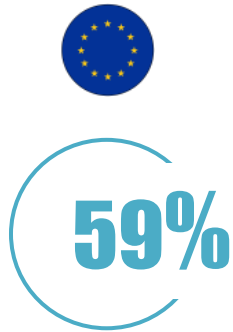
Which of the following emissions do you take into account in your company car policy?

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



PROPORTION OF COMPANIES TAKING CO2 EMISSIONS INTO ACCOUNT IN THEIR CAR POLICY

Which of the following emissions do you take into account in your company car policy?



A person wearing a white shirt is shown from the chest down, sitting at a desk and writing on a document with a pen. The background is blurred, showing other people in a professional setting. The text "II - FINANCING" is overlaid in the center of the image, underlined.

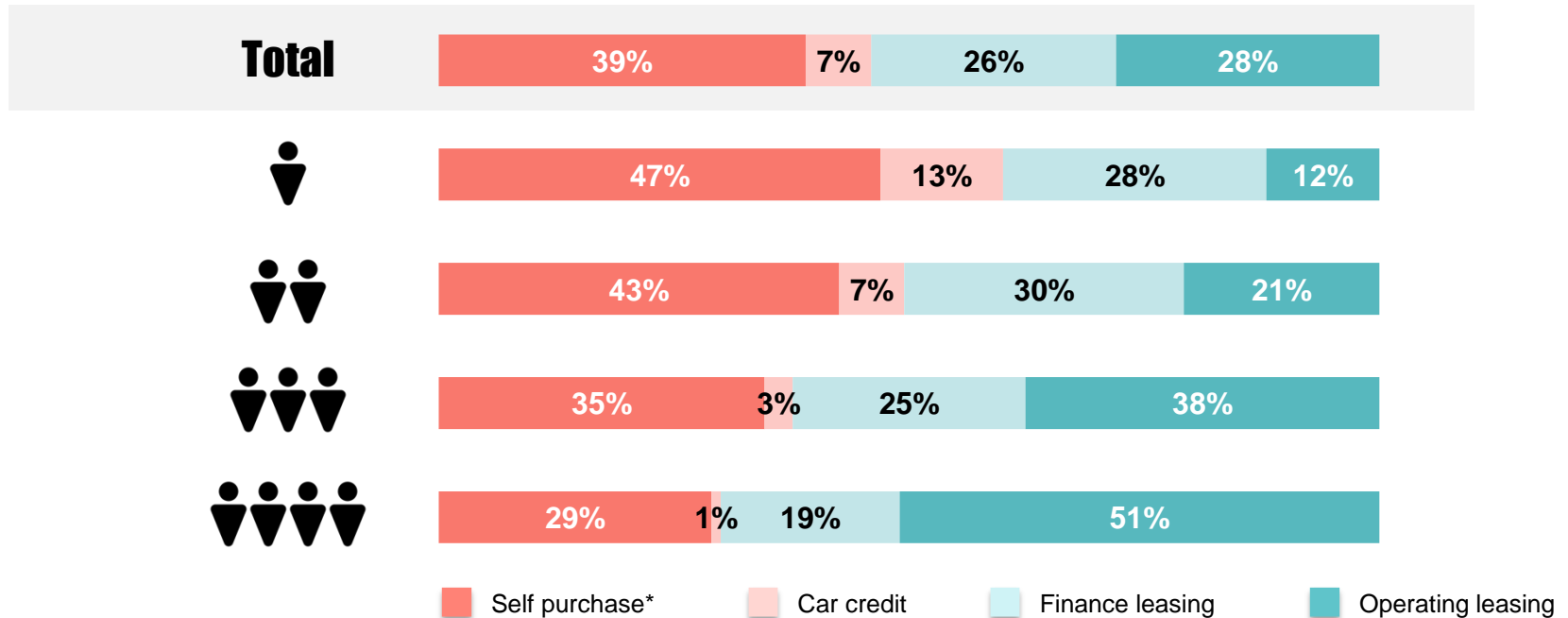
II - FINANCING

MAIN FINANCING METHOD

by company size

What is the main financing method used to finance your company vehicles today?

Proportion of companies using the following solutions as their main financing method for their fleet vehicles

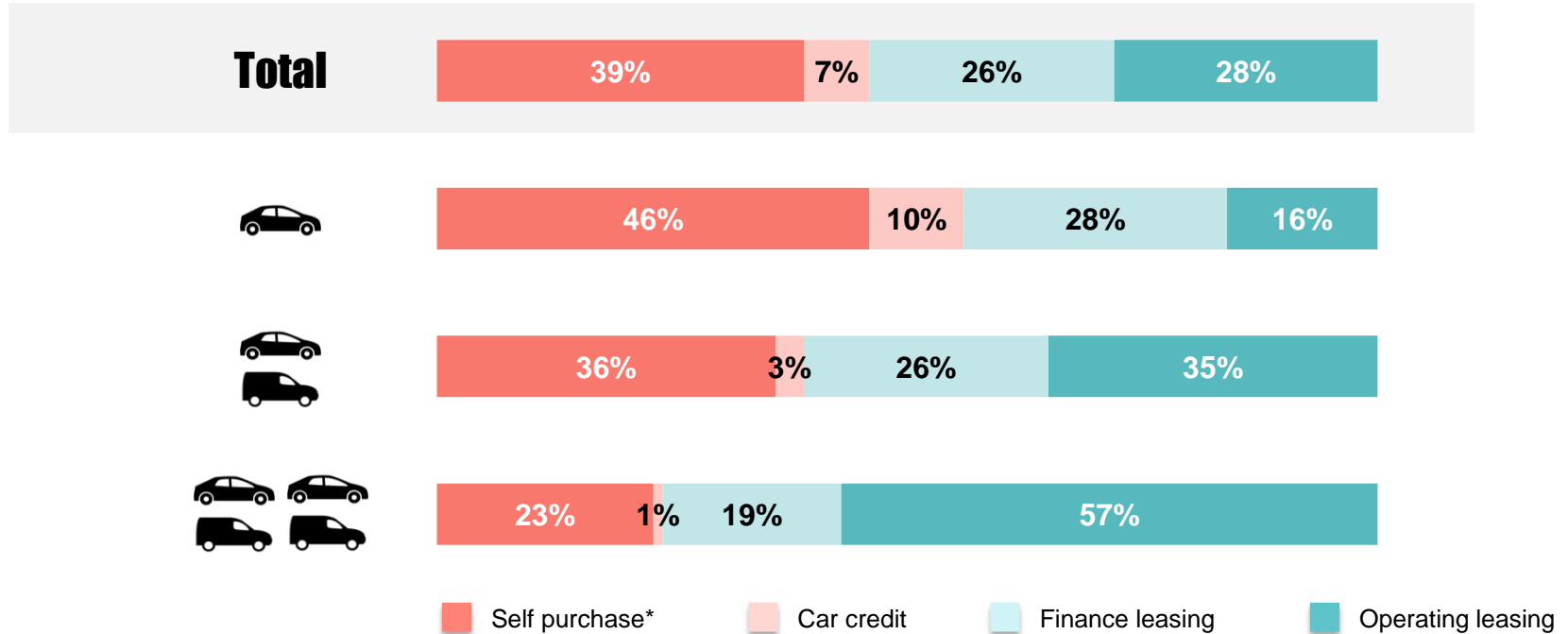


MAIN FINANCING METHOD

by fleet size

What is the main financing method used to finance your company vehicles today?

Proportion of companies using the following solutions as their main financing method for their fleet vehicles

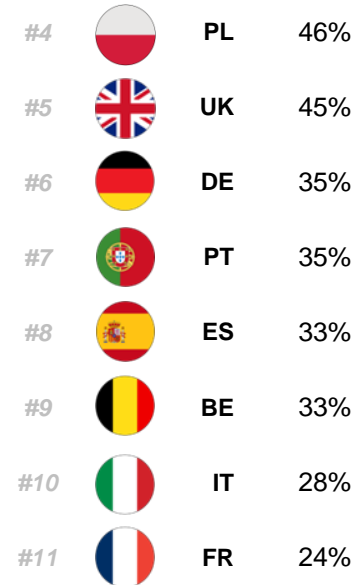
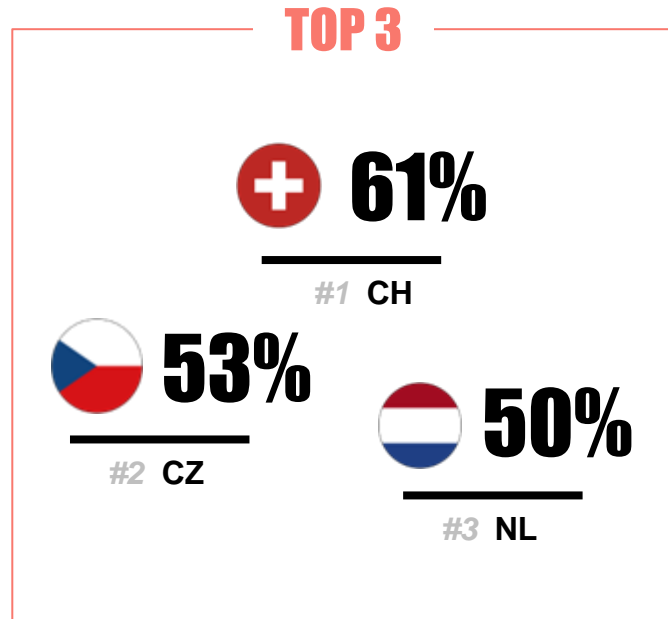


*Self-purchase = outright purchase + credit (other than car credit)
Data have been consolidated: 3 years average

MAIN FINANCING METHOD: Self purchase

What is the main financing method used to finance your company vehicles today?

Proportion of companies using self purchase as their main financing method for their fleet vehicles

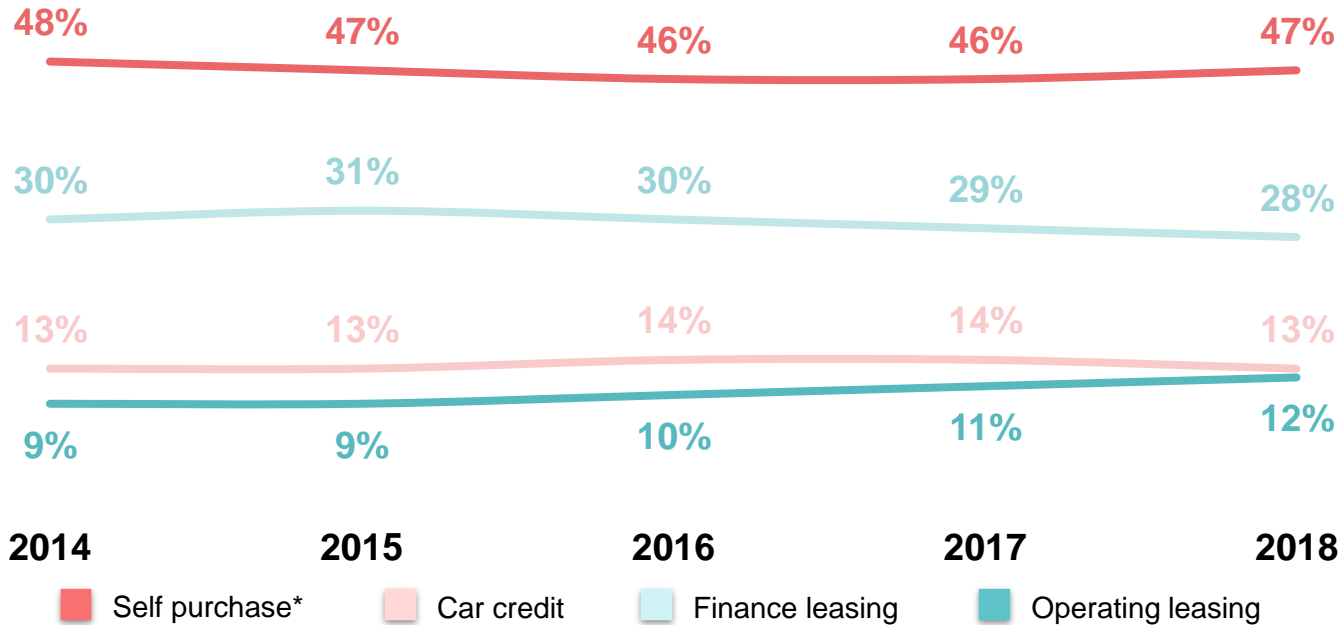


EVOLUTION OF THE MAIN FINANCING METHOD

by company size – focus on 1 to 9

What is the main financing method used to finance your company vehicles today?

Proportion of companies using the following solutions as their main financing method for their fleet vehicles



*Self-purchase = outright purchase + credit (other than car credit)

Data have been consolidated: 3 years average

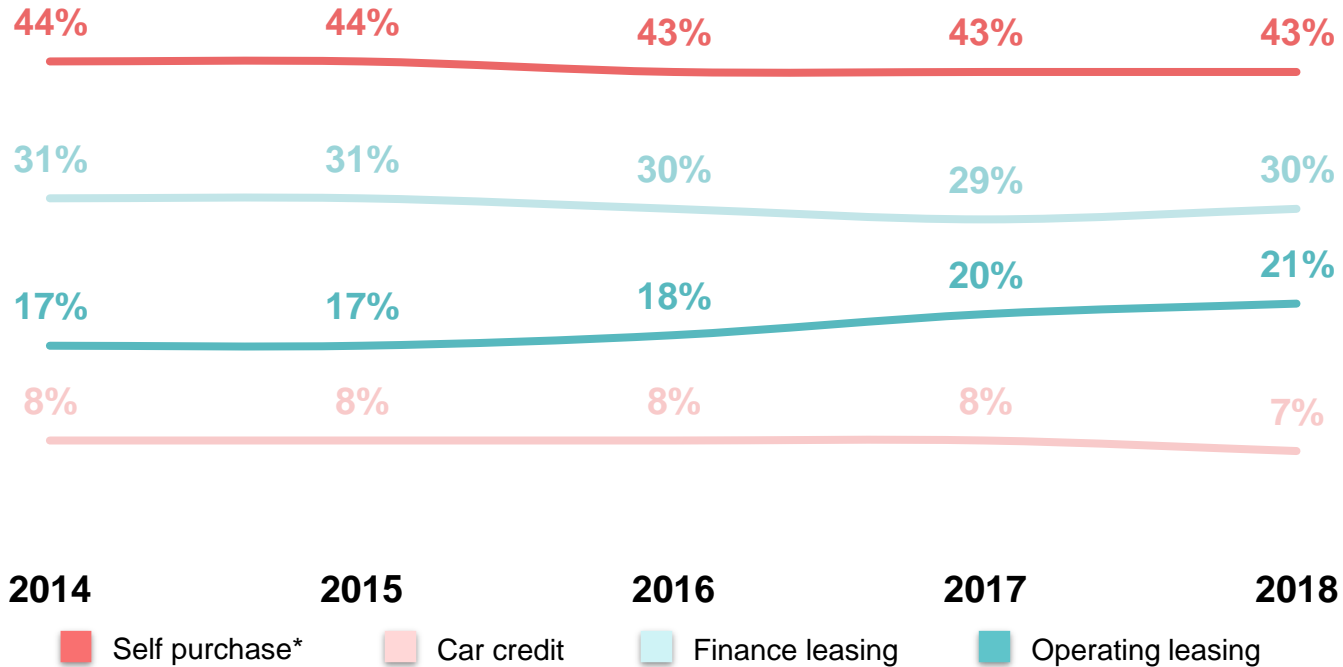
Results provided for 2016 are calculated by the mean of an extrapolation between the results of the years 2015 and 2017.

EVOLUTION OF THE MAIN FINANCING METHOD

by company size – focus on 10 to 99

What is the main financing method used to finance your company vehicles today?

Proportion of companies using the following solutions as their main financing method for their fleet vehicles



*Self-purchase = outright purchase + credit (other than car credit)

Data have been consolidated: 3 years average

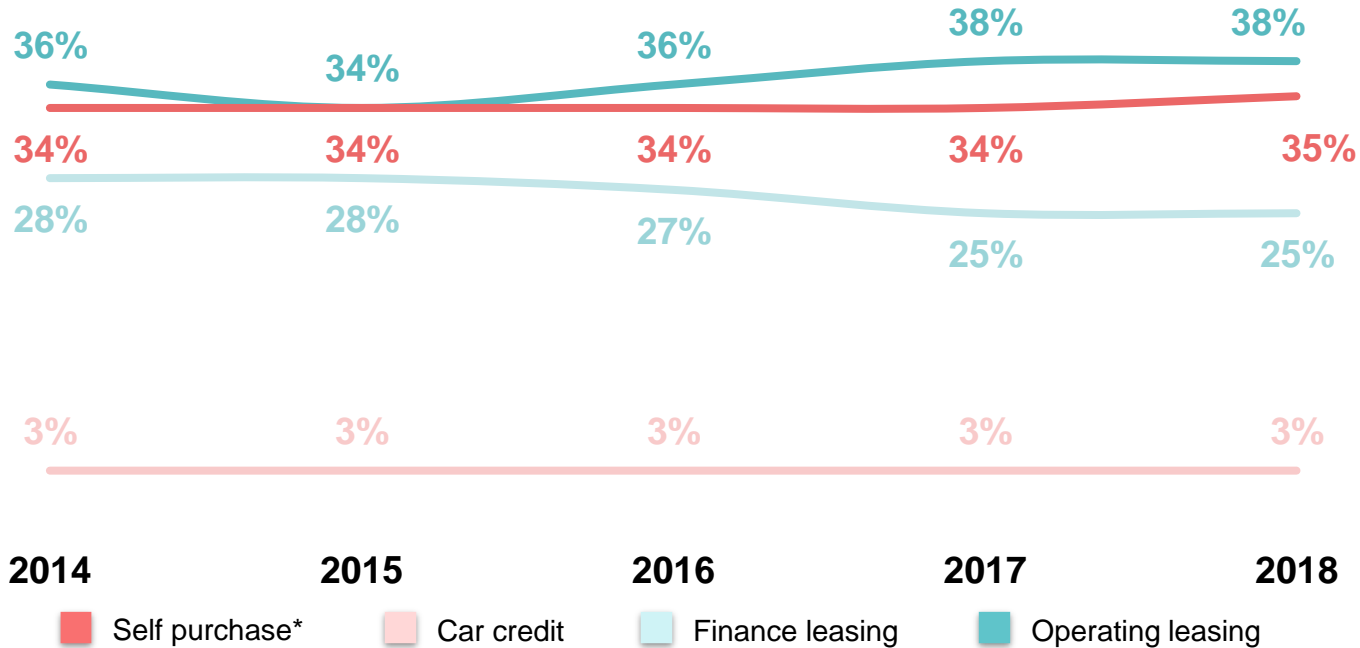
Results provided for 2016 are calculated by the mean of an extrapolation between the results of the years 2015 and 2017.

EVOLUTION OF THE MAIN FINANCING METHOD

by company size – focus on 100 to 249/499/999

What is the main financing method used to finance your company vehicles today?

Proportion of companies using the following solutions as their main financing method for their fleet vehicles



*Self-purchase = outright purchase + credit (other than car credit)

Data have been consolidated: 3 years average

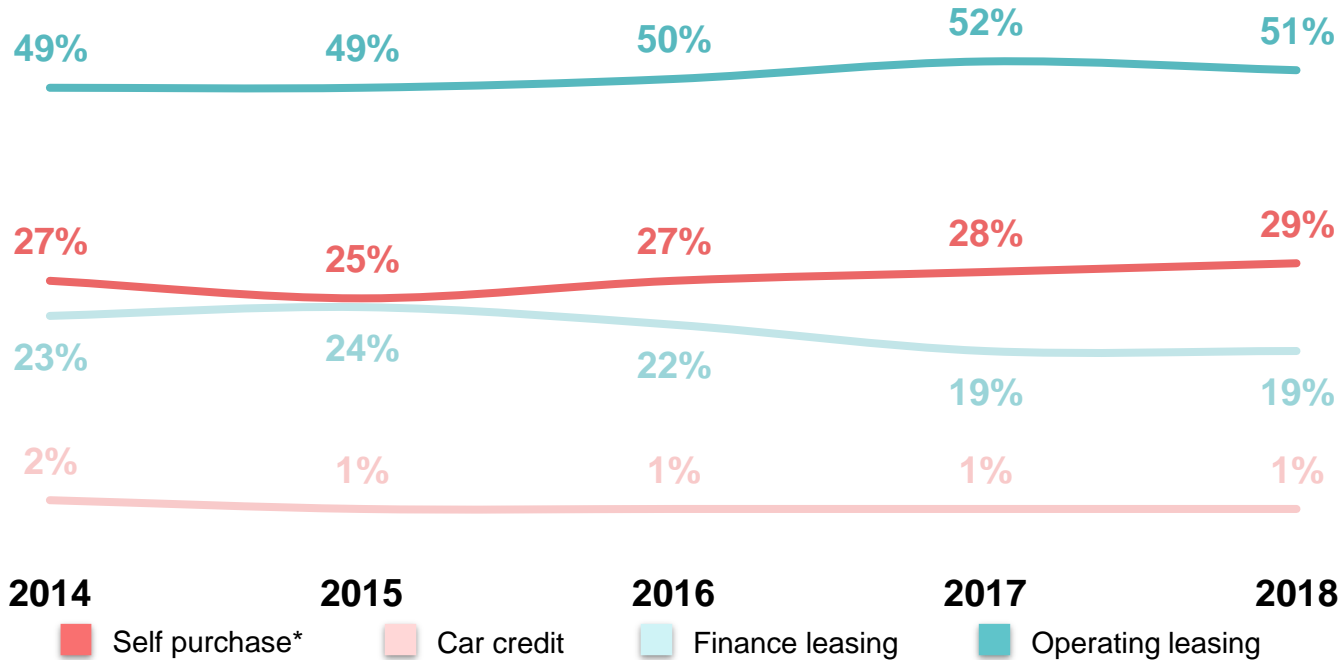
Results provided for 2016 are calculated by the mean of an extrapolation between the results of the years 2015 and 2017.

EVOLUTION OF THE MAIN FINANCING METHOD

by company size – focus on 250/500/1000 and more

What is the main financing method used to finance your company vehicles today?

Proportion of companies using the following solutions as their main financing method for their fleet vehicles



*Self-purchase = outright purchase + credit (other than car credit)

Data have been consolidated: 3 years average

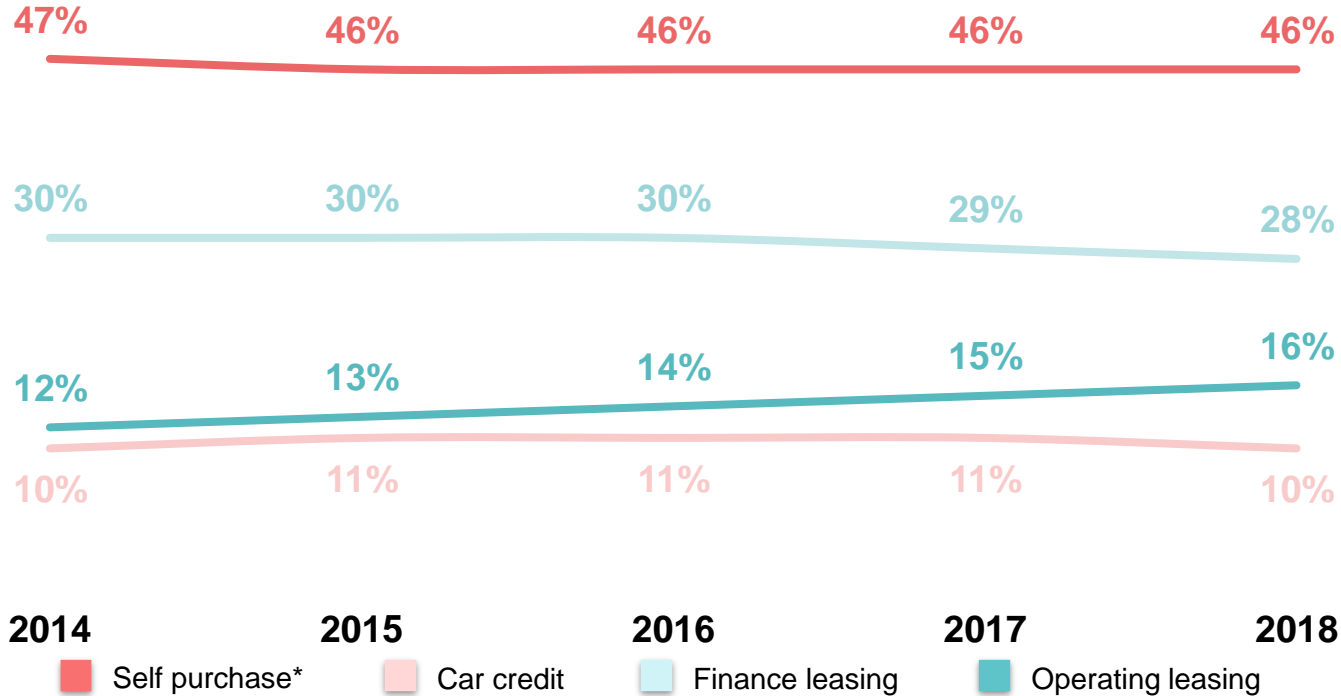
Results provided for 2016 are calculated by the mean of an extrapolation between the results of the years 2015 and 2017.

EVOLUTION OF THE MAIN FINANCING METHOD

by fleet size – focus on 1 to 9

What is the main financing method used to finance your company vehicles today?

Proportion of companies using the following solutions as their main financing method for their fleet vehicles



*Self-purchase = outright purchase + credit (other than car credit)

Data have been consolidated: 3 years average

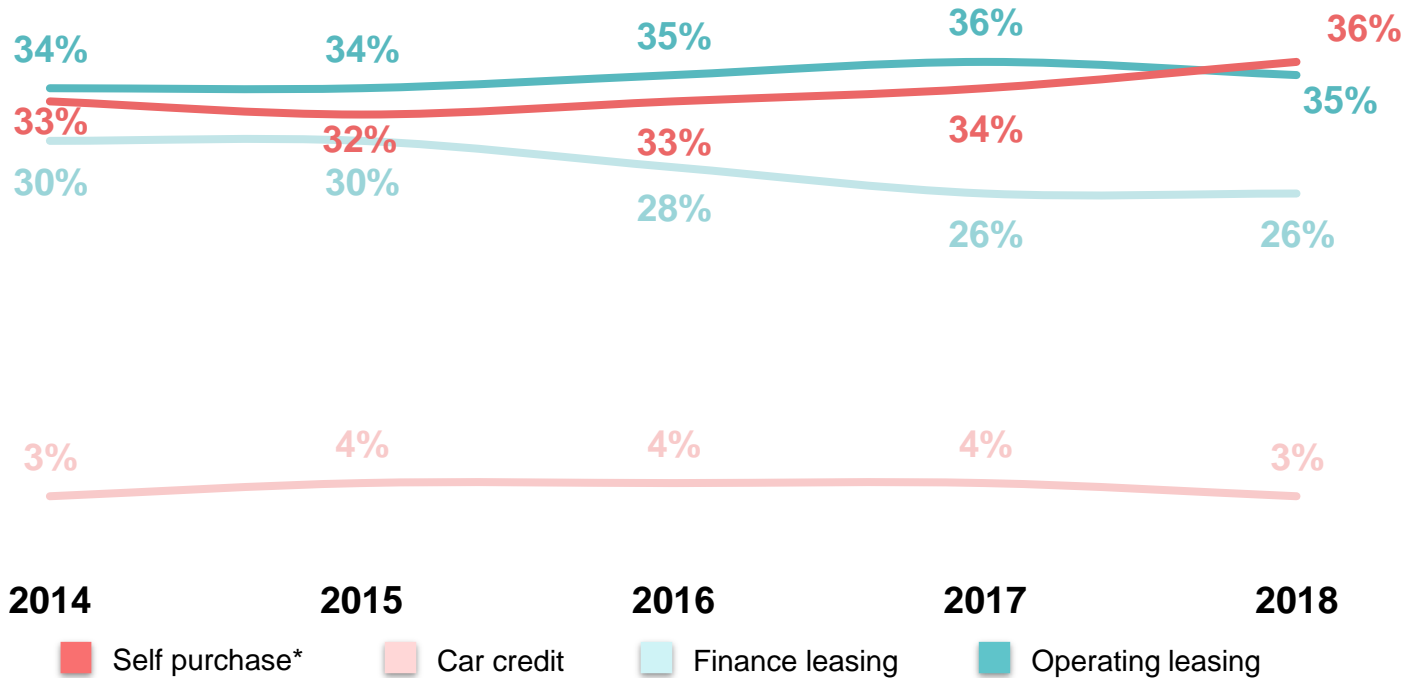
Results provided for 2016 are calculated by the mean of an extrapolation between the results of the years 2015 and 2017.

EVOLUTION OF THE MAIN FINANCING METHOD

by fleet size – focus on 10 to 49

What is the main financing method used to finance your company vehicles today?

Proportion of companies using the following solutions as their main financing method for their fleet vehicles



*Self-purchase = outright purchase + credit (other than car credit)

Data have been consolidated: 3 years average

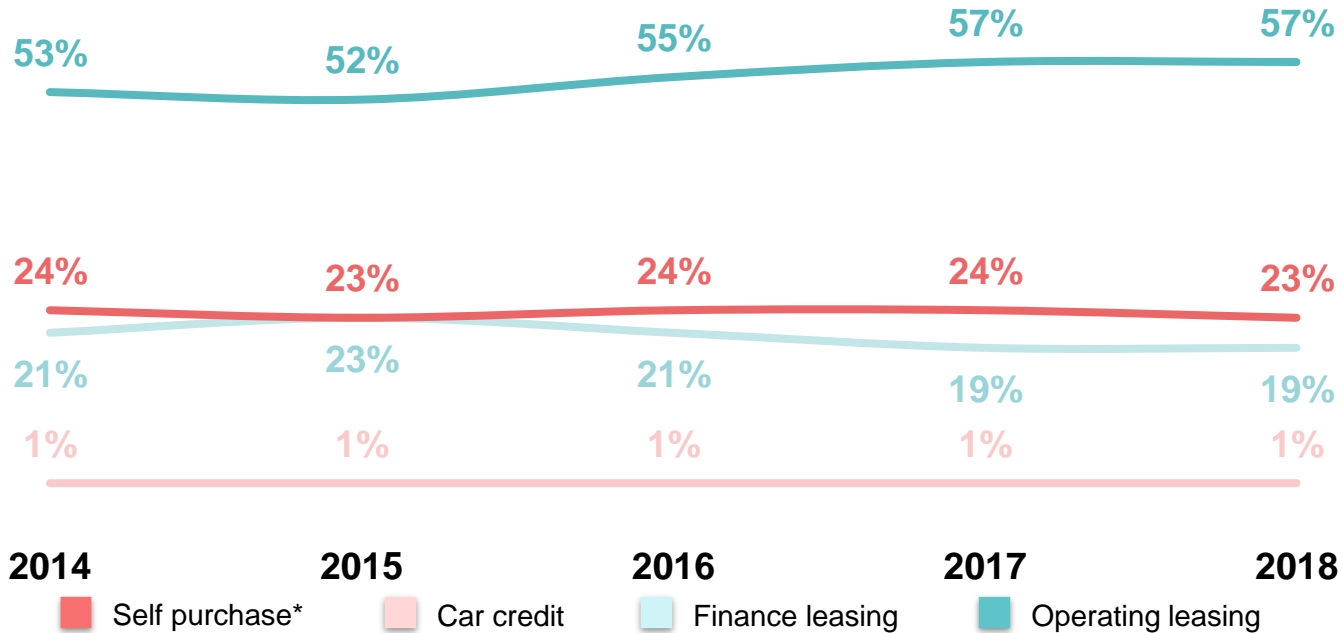
Results provided for 2016 are calculated by the mean of an extrapolation between the results of the years 2015 and 2017.

EVOLUTION OF THE MAIN FINANCING METHOD

by fleet size – focus on 50 and more

What is the main financing method used to finance your company vehicles today?

Proportion of companies using the following solutions as their main financing method for their fleet vehicles



*Self-purchase = outright purchase + credit (other than car credit)

Data have been consolidated: 3 years average

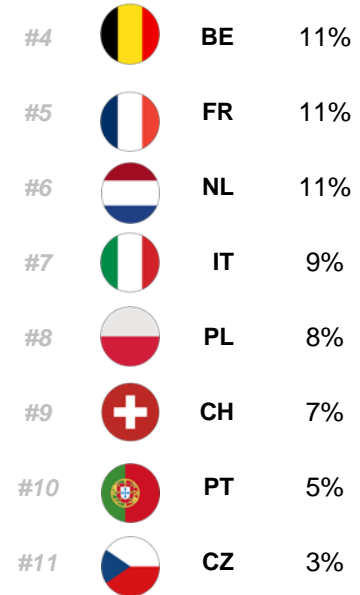
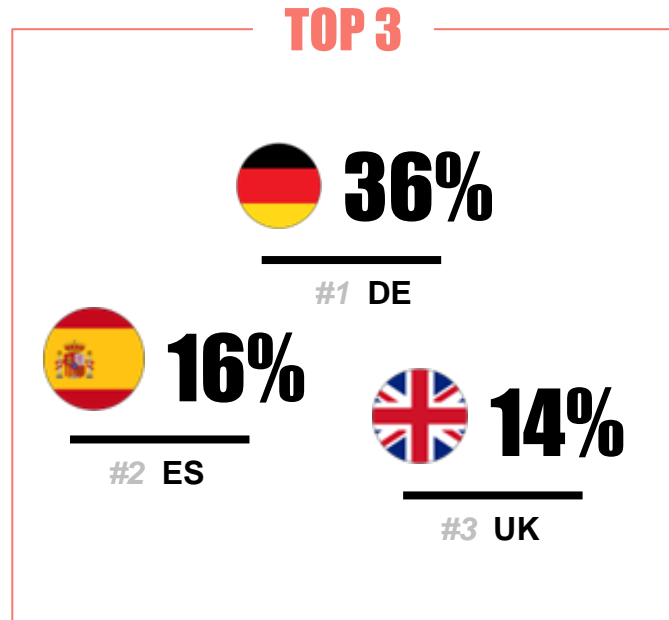
Results provided for 2016 are calculated by the mean of an extrapolation between the results of the years 2015 and 2017.

MAIN FINANCING METHOD – Focus Operating leasing

by company size – focus on 1 to 9

What is the main financing method used to finance your company vehicles today?

Proportion of companies using operating leasing as their main financing method for their fleet vehicles

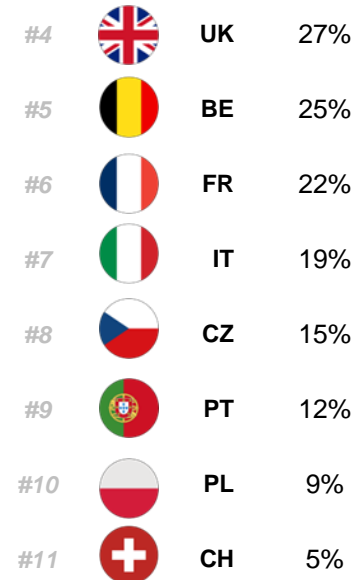
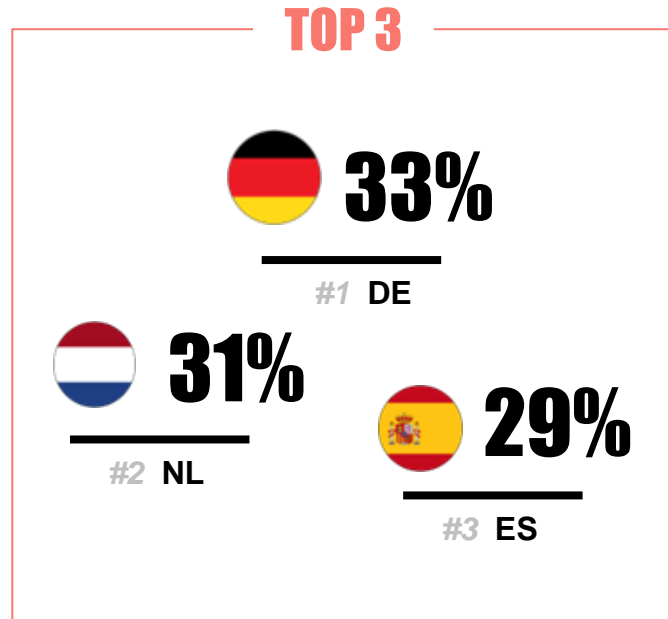


MAIN FINANCING METHOD – Focus Operating leasing

by company size – focus on 10 to 99

What is the main financing method used to finance your company vehicles today?

Proportion of companies using operating leasing as their main financing method for their fleet vehicles

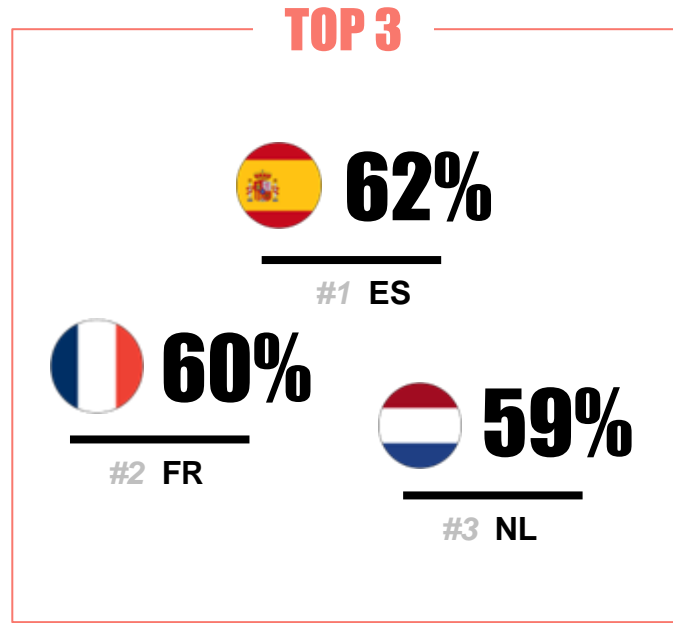
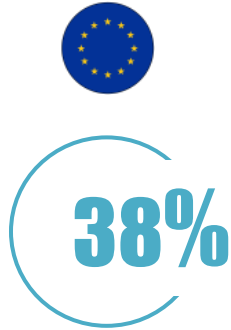










MAIN FINANCING METHOD – Focus Operating leasing

by company size – focus on 100 to 249/499/999

What is the main financing method used to finance your company vehicles today?

Proportion of companies using operating leasing as their main financing method for their fleet vehicles



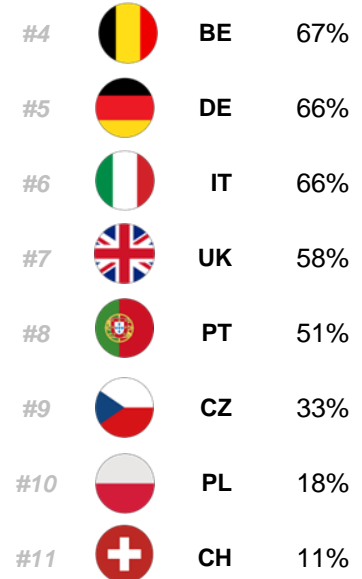
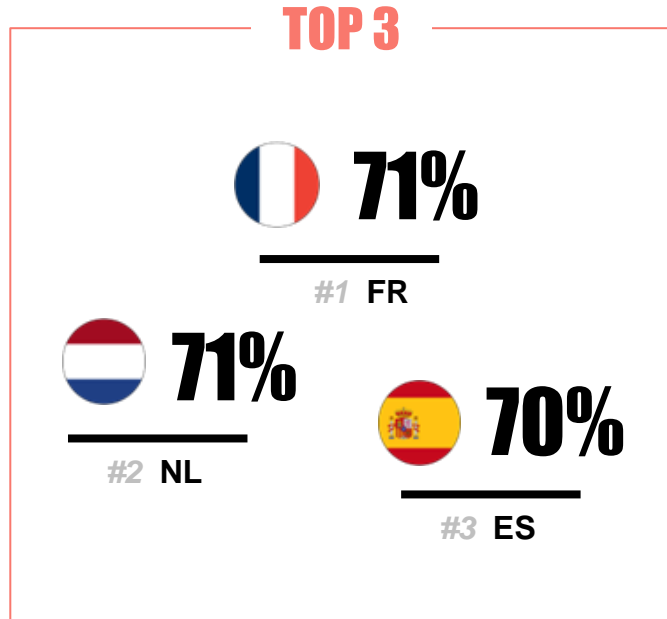
#4		BE	54%
#5		DE	52%
#6		UK	44%
#7		IT	43%
#8		PT	20%
#9		CZ	19%
#10		CH	11%
#11		PL	10%

MAIN FINANCING METHOD – Focus Operating leasing

by company size – focus on 250/500/1000 and more

What is the main financing method used to finance your company vehicles today?

Proportion of companies using operating leasing as their main financing method for their fleet vehicles

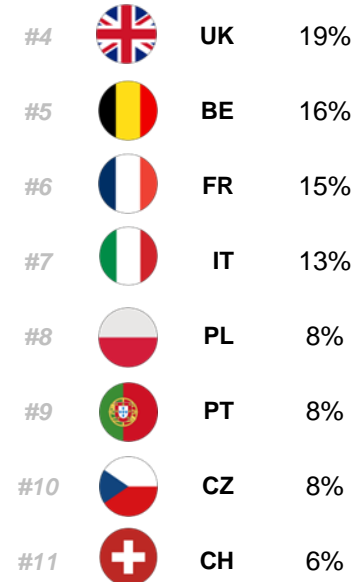
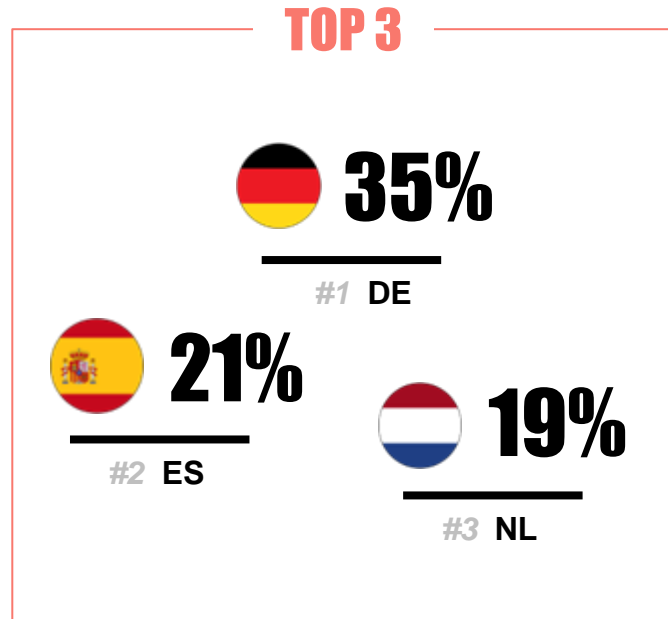


MAIN FINANCING METHOD – Focus Operating leasing

by company size – focus on 1 to 99

What is the main financing method used to finance your company vehicles today?

Proportion of companies using operating leasing as their main financing method for their fleet vehicles

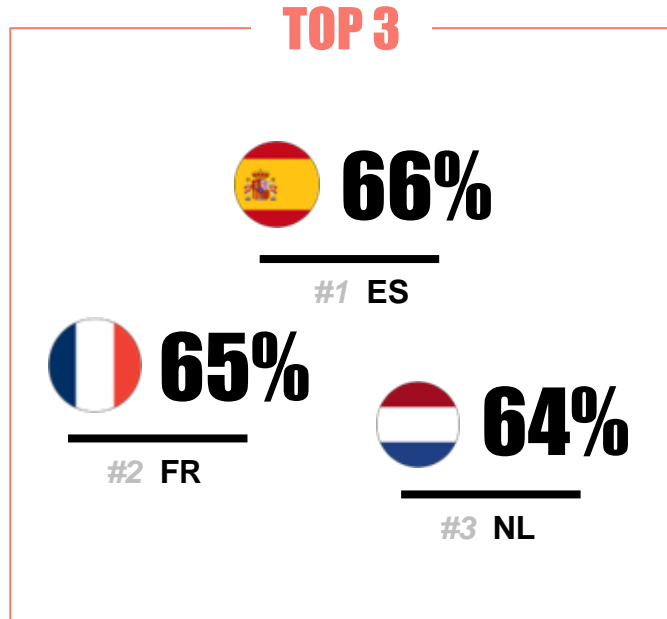
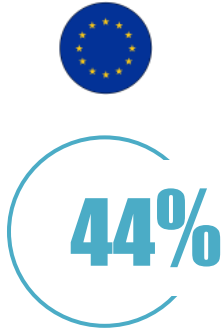










MAIN FINANCING METHOD – Focus Operating leasing

by company size – focus on 100 and more

What is the main financing method used to finance your company vehicles today?

Proportion of companies using operating leasing as their main financing method for their fleet vehicles



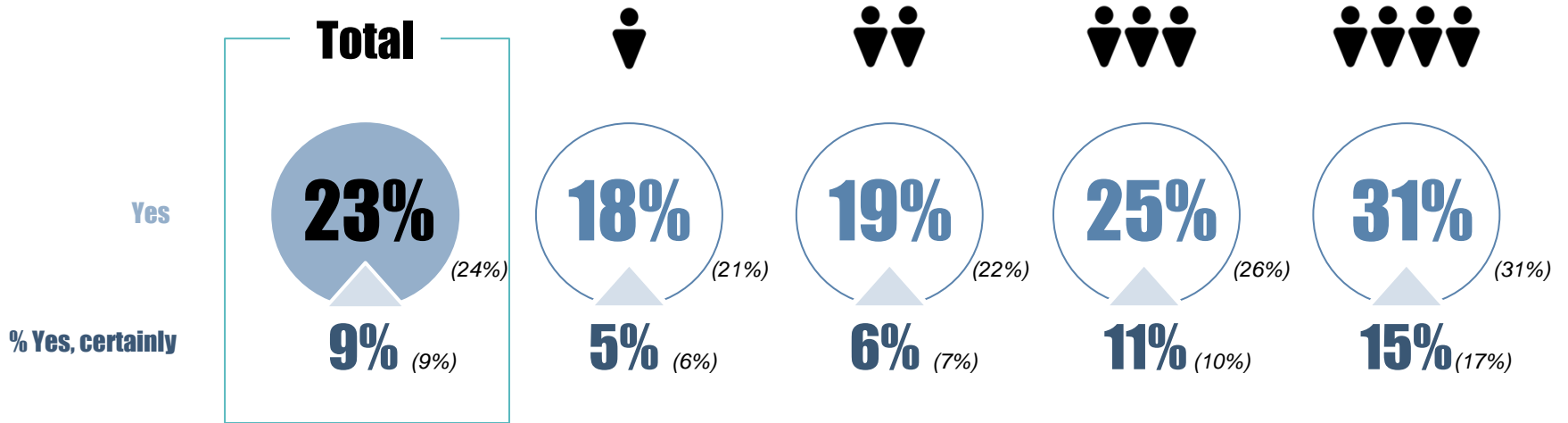
#4		BE	59%
#5		DE	58%
#6		IT	53%
#7		UK	50%
#8		PT	33%
#9		CZ	25%
#10		PL	14%
#11		CH	11%

INTENTION TO DEVELOP OPERATING LEASING

by company size

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

Proportion of companies having the intention to develop operational leasing

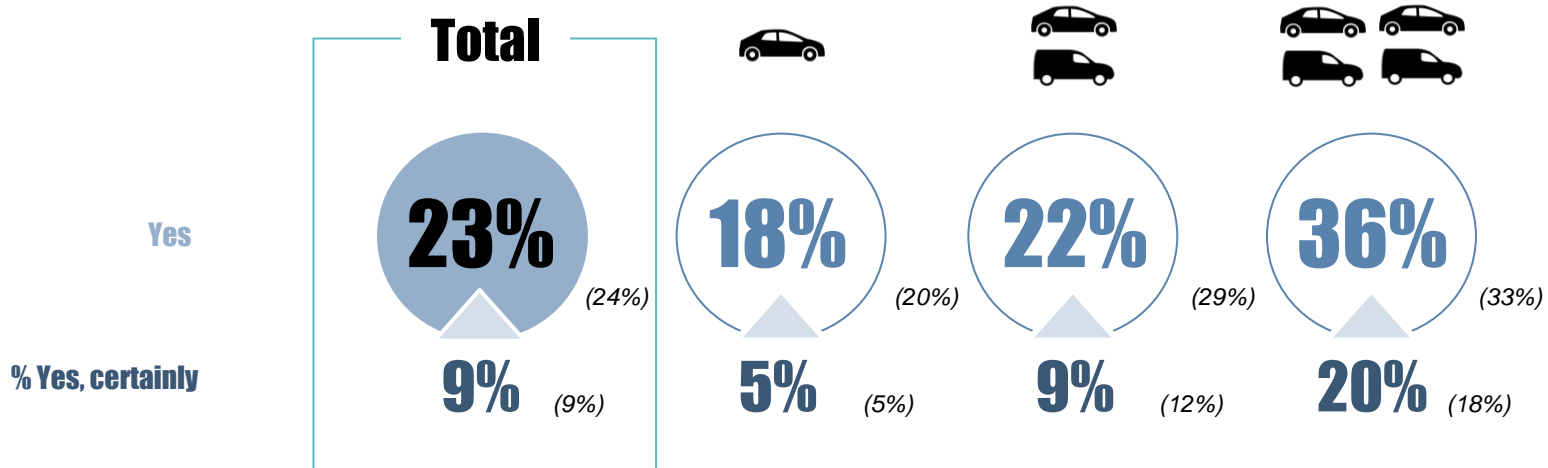


INTENTION TO DEVELOP OPERATING LEASING

by fleet size

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

Proportion of companies having the intention to develop operational leasing

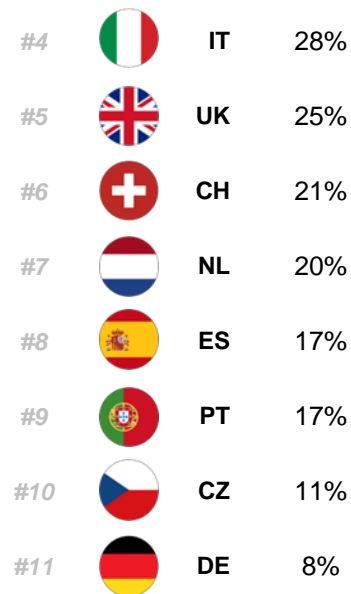
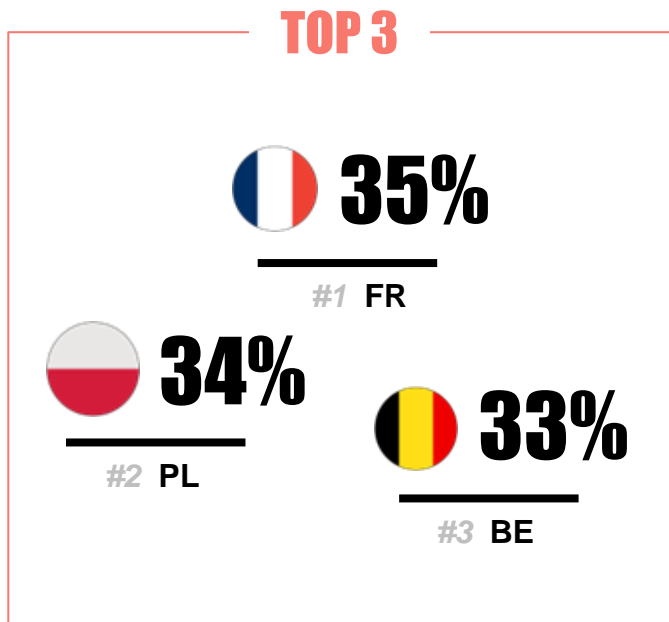
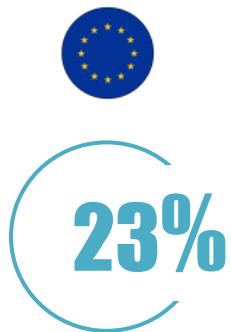


INTENTION TO DEVELOP OPERATING LEASING :

Yes

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

Proportion of companies having the intention to develop operational leasing

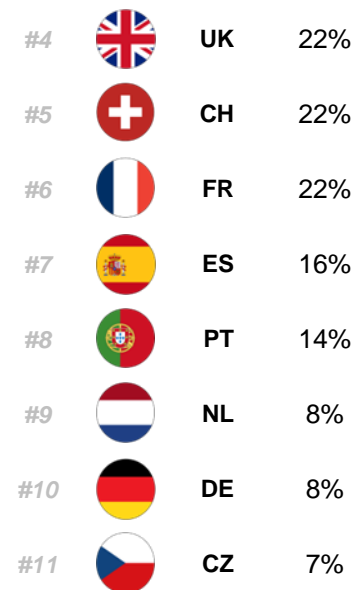
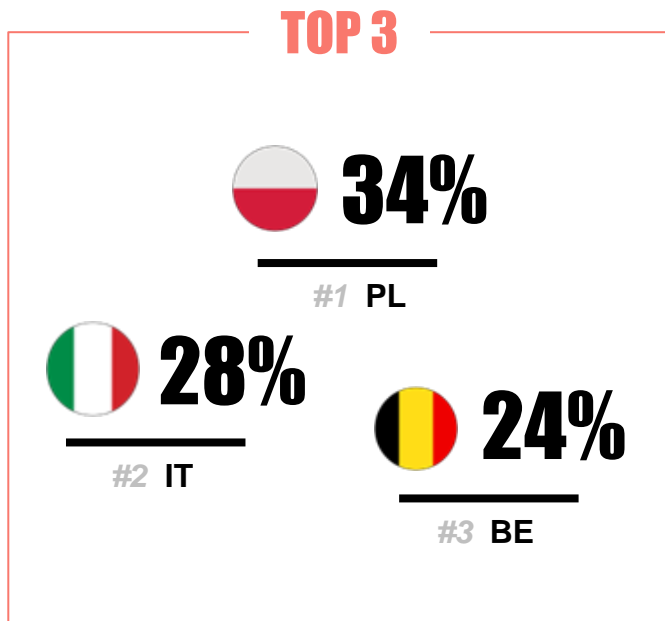


INTENTION TO DEVELOP OPERATING LEASING :

Yes

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

Proportion of companies having the intention to develop operational leasing

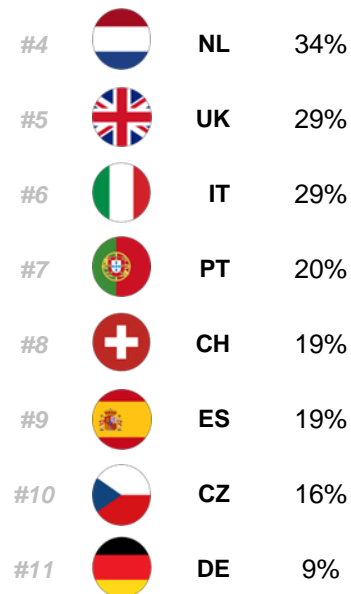
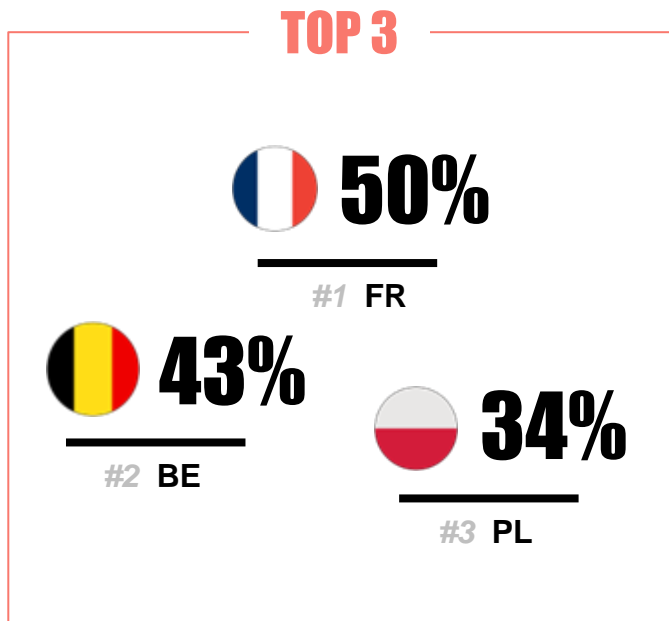


INTENTION TO DEVELOP OPERATING LEASING :

Yes

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

Proportion of companies having the intention to develop operational leasing



A photograph of a person driving a car at night. The driver's hands are on the steering wheel, and they are wearing a watch and a red wristband. The car's interior, including the dashboard and center console, is visible. The background shows a blurred cityscape with warm lights from buildings and streetlights, creating a bokeh effect. The overall scene is dimly lit, with the primary light sources being the car's interior lights and the distant city lights.

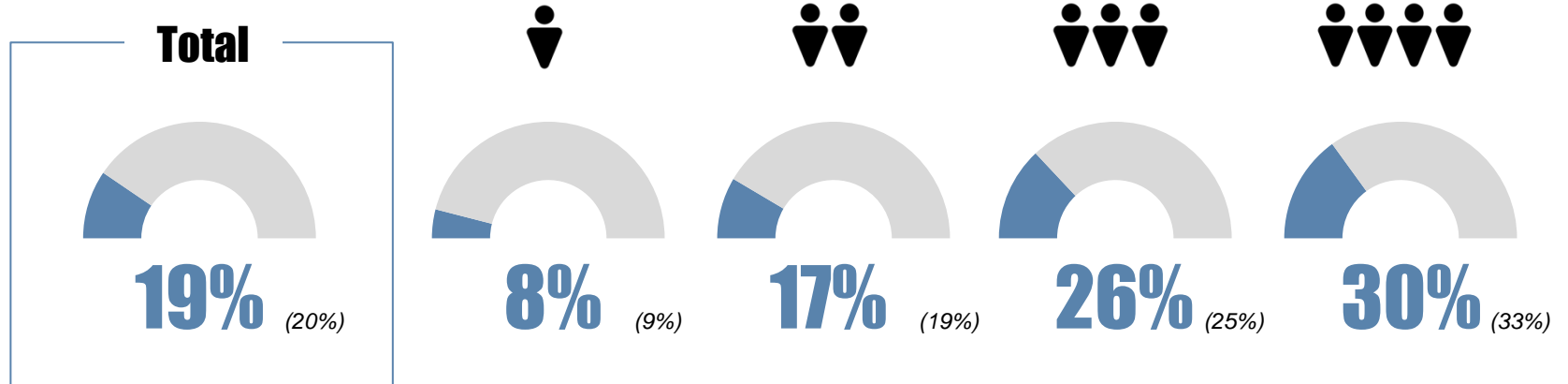
III - TELEMATICS

USE OF TELEMATICS

by company size

Have you implemented Telematics within your fleet?

Proportion of companies having implemented telematics in their fleet

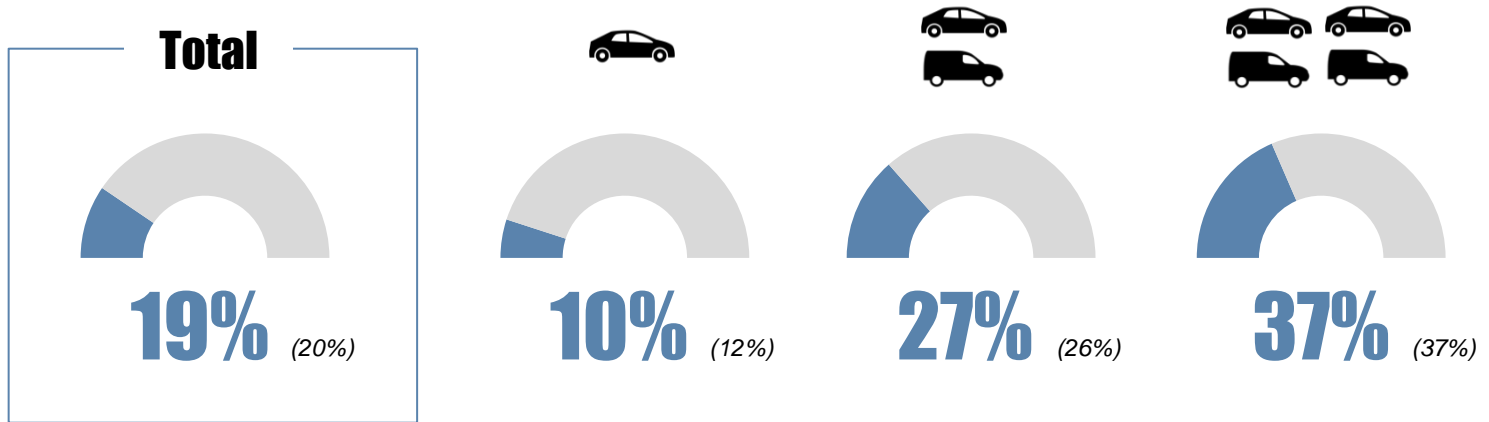


USE OF TELEMATICS

by fleet size

Have you implemented Telematics within your fleet?

Proportion of companies having implemented telematics in their fleet

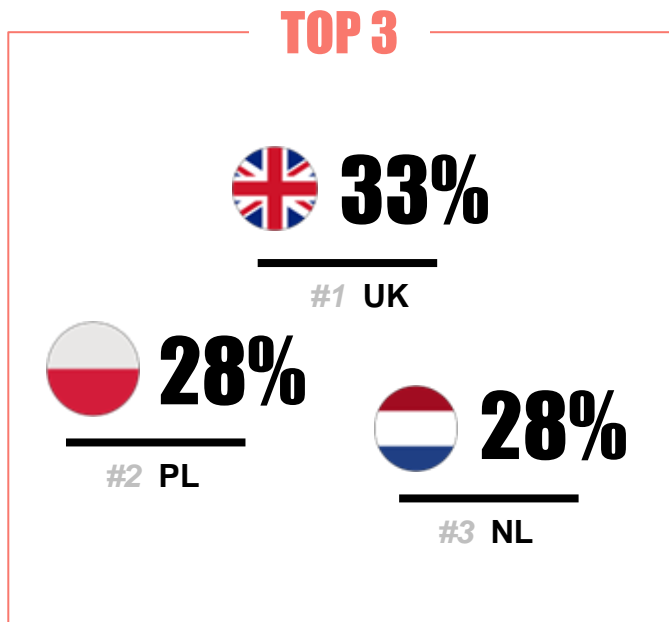


USE OF TELEMATICS

Yes

Have you implemented Telematics within your fleet?

Proportion of companies having implemented telematics in their fleet



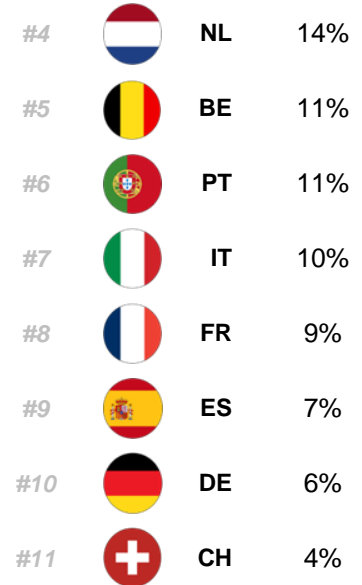
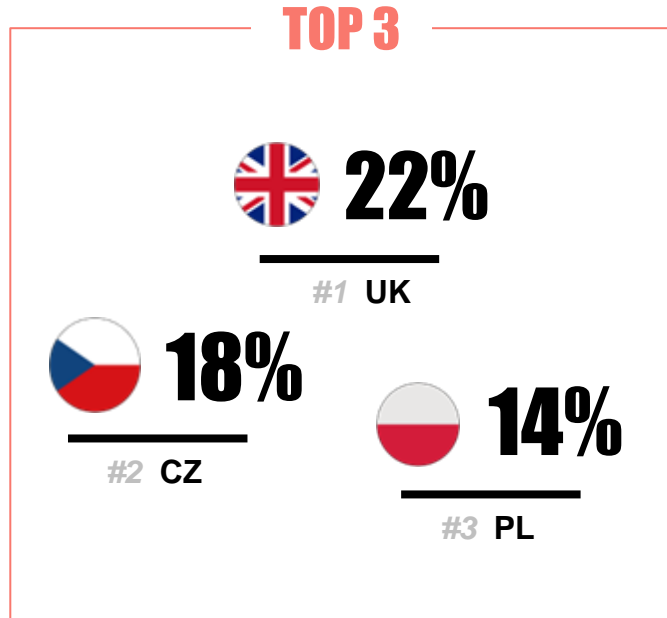
USE OF TELEMATICS

Yes

Have you implemented Telematics within your fleet?



Proportion of companies having implemented telematics in their fleet



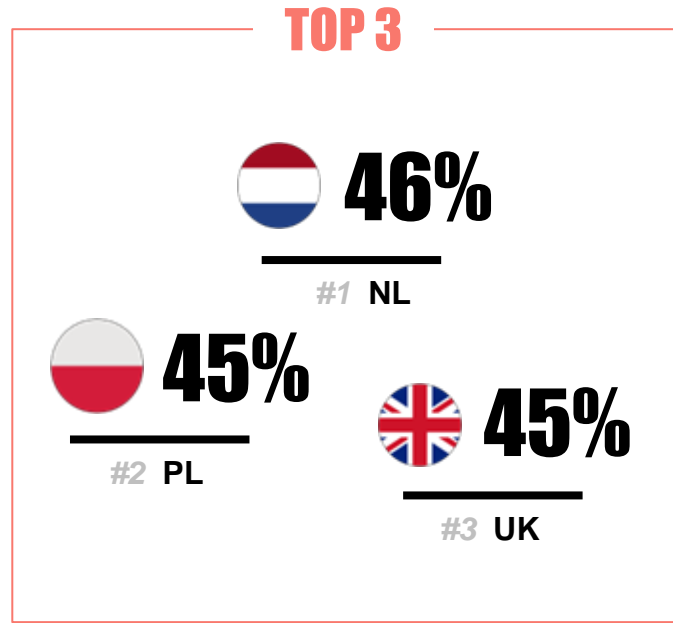
USE OF TELEMATICS

Yes

Have you implemented Telematics within your fleet?



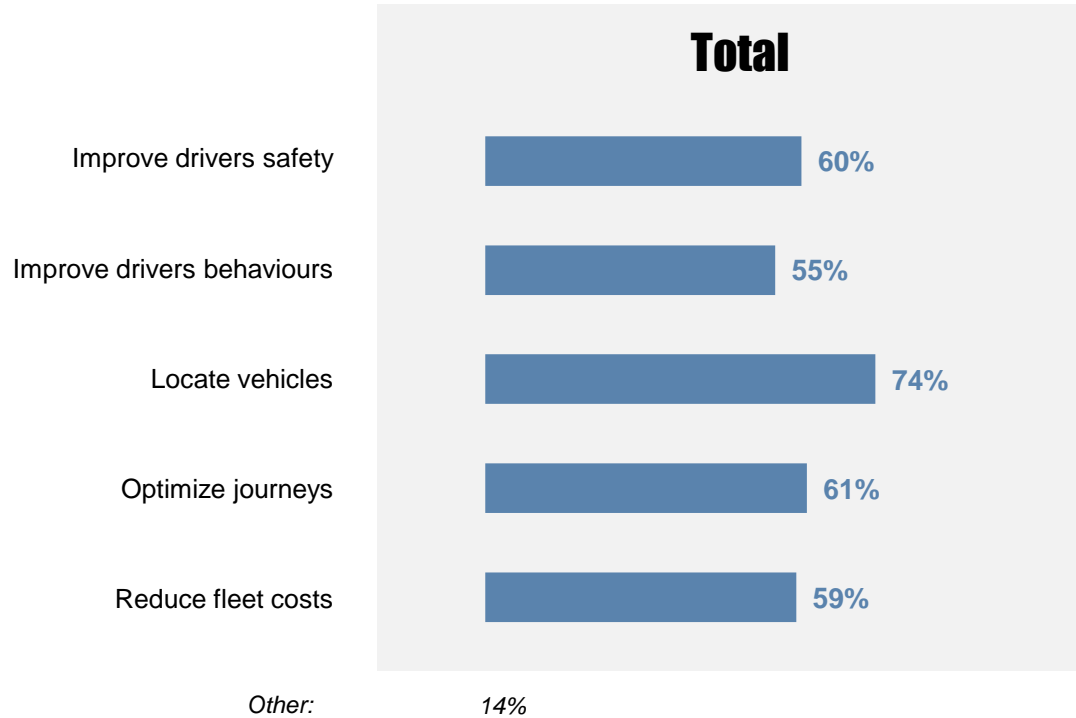
Proportion of companies having implemented telematics in their fleet



#4		CZ	37%
#5		ES	36%
#6		PT	21%
#7		FR	19%
#8		IT	17%
#9		CH	17%
#10		BE	14%
#11		DE	11%

PURPOSES FOR USING TELEMATICS

For which reasons do you use telematics within your company?





IV - PERSPECTIVE IN TERMS OF CORPORATE MOBILITY

DEVELOPMENT POTENTIAL OF MOBILITY ALTERNATIVES

by company size

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

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

Already using

Considered in the next 3 years

Total

Already using
+ considered



Car sharing or Ride sharing

37%

21%

32%

42%

60%

Car sharing
(the company makes available upon reservation vehicles for its employees)



23%

12%

16%

28%

44%

Ride sharing

between employees (several employees in the same car for a journey -car pooling, taxi service, private hire vehicle-)



28%

15%

25%

31%

46%

DEVELOPMENT POTENTIAL OF MOBILITY ALTERNATIVES

by fleet size

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

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

Already using

Considered in the next 3 years

Total

Already using
+ considered

Car sharing or Ride sharing

37%

26%

46%

59%

Car sharing
(the company makes available upon reservation vehicles for its employees)



23%



14%



30%



43%

Ride sharing
between employees (several employees in the same car for a journey -car pooling, taxi service, private hire vehicle-)



28%



19%



34%



44%

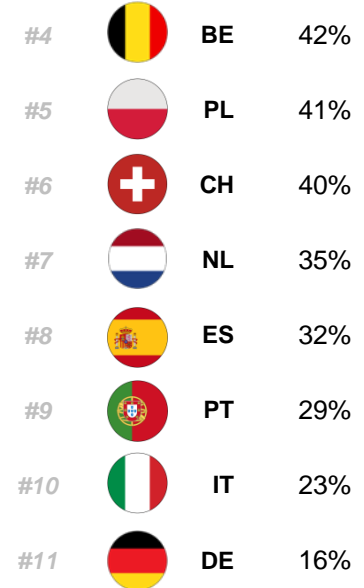
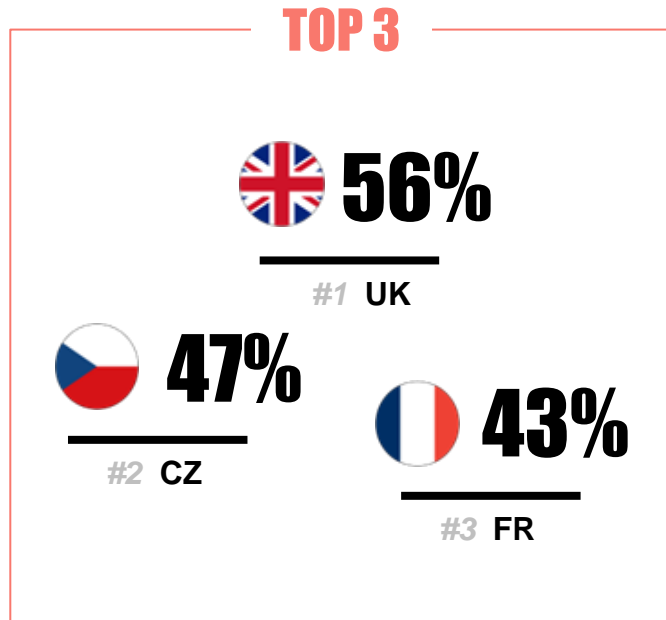
DEVELOPMENT POTENTIAL OF MOBILITY ALTERNATIVES

Car sharing or Ride sharing

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

Proportion of companies already using or considering to use car sharing or ride sharing in the next 3 years

% Already using
+ considered in the next 3 years



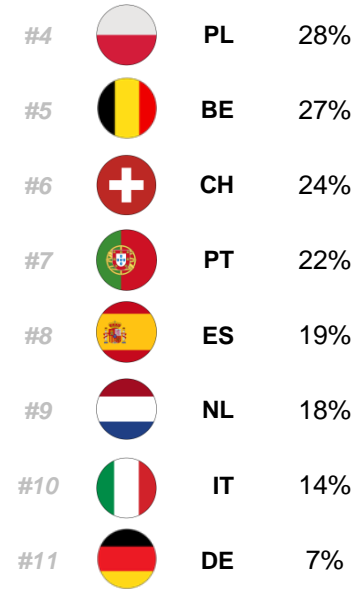
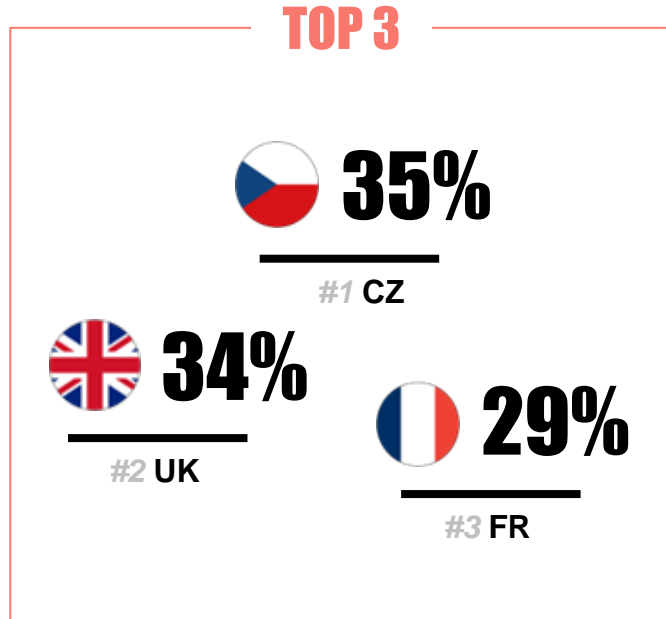
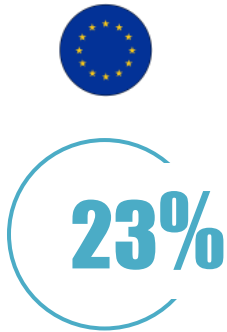
DEVELOPMENT POTENTIAL OF MOBILITY ALTERNATIVES

Car sharing

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

Proportion of companies already using or considering to use car sharing in the next 3 years

% Already using
+ considered in the next 3 years



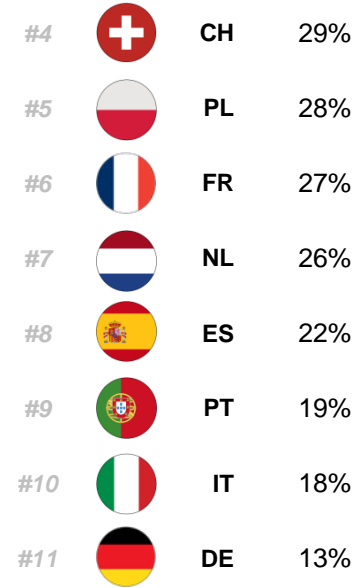
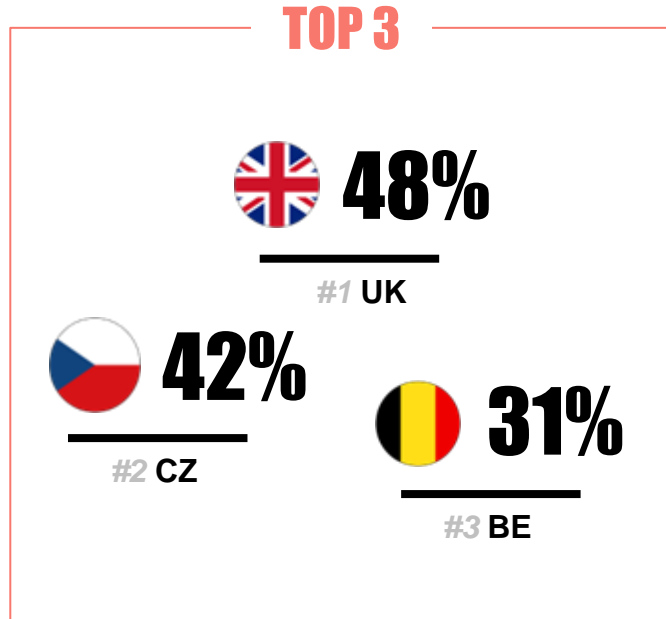
DEVELOPMENT POTENTIAL OF MOBILITY ALTERNATIVES

Ride sharing

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

Proportion of companies already using or considering to use ride sharing in the next 3 years

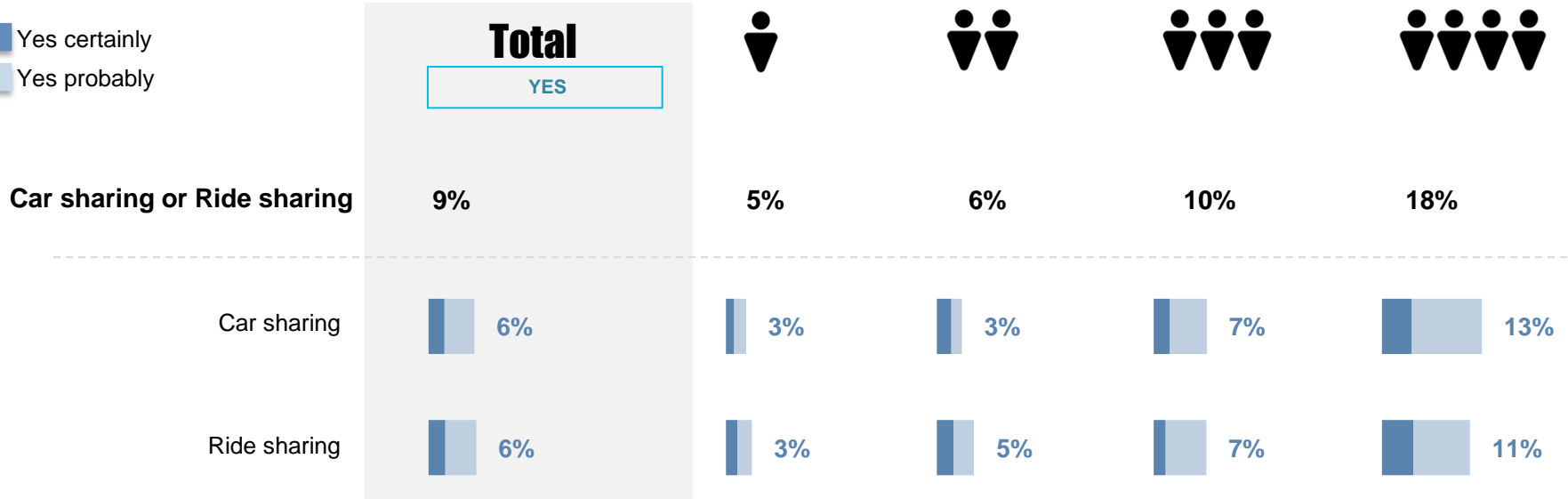
% Already using
+ considered in the next 3 years



PROPORTION OF COMPANIES READY TO GIVE UP ALL OR PART OF THEIR COMPANY CARS FOR ALTERNATIVE MOBILITY SOLUTIONS - by company size

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

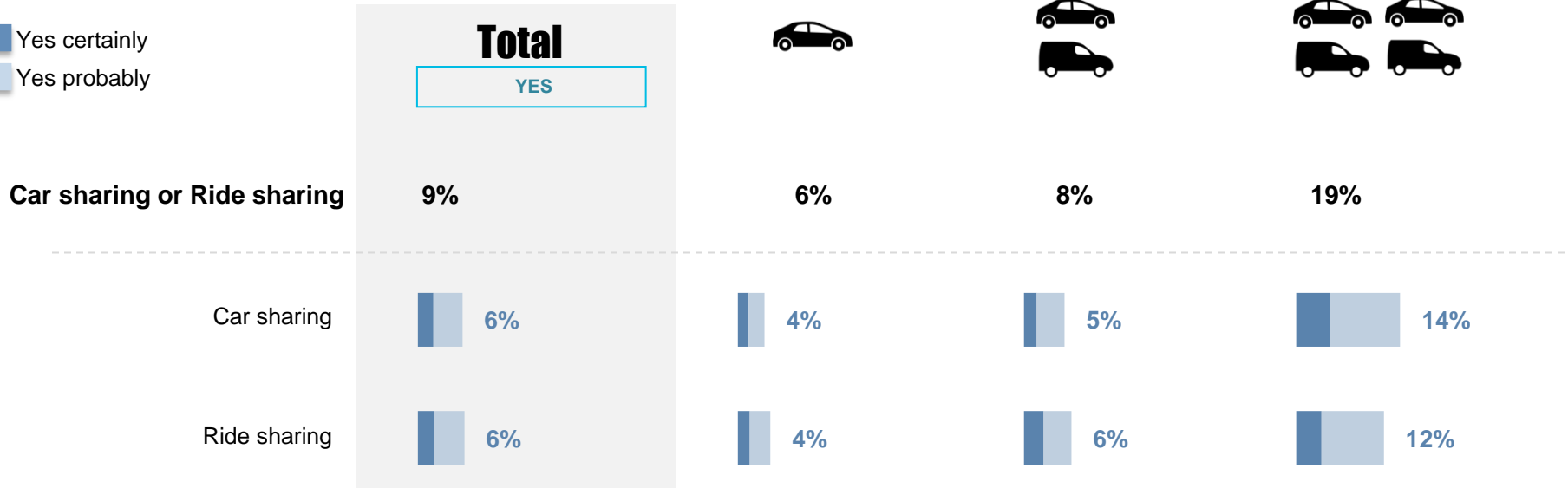
■ Yes certainly
■ Yes probably



PROPORTION OF COMPANIES READY TO GIVE UP ALL OR PART OF THEIR COMPANY CARS FOR ALTERNATIVE MOBILITY SOLUTIONS - by fleet size

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

■ Yes certainly
■ Yes probably



PROPORTION OF COMPANIES READY TO GIVE UP ALL OR PART OF THEIR COMPANY CARS FOR CAR SHARING OR RIDE SHARING

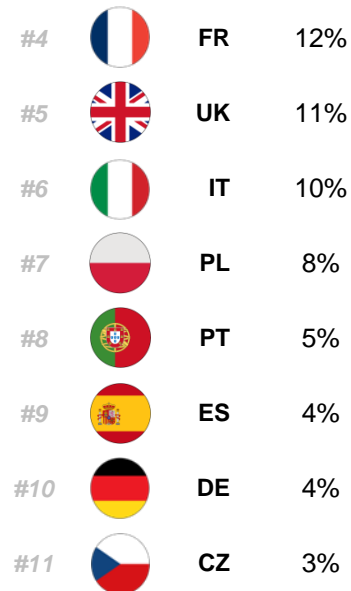
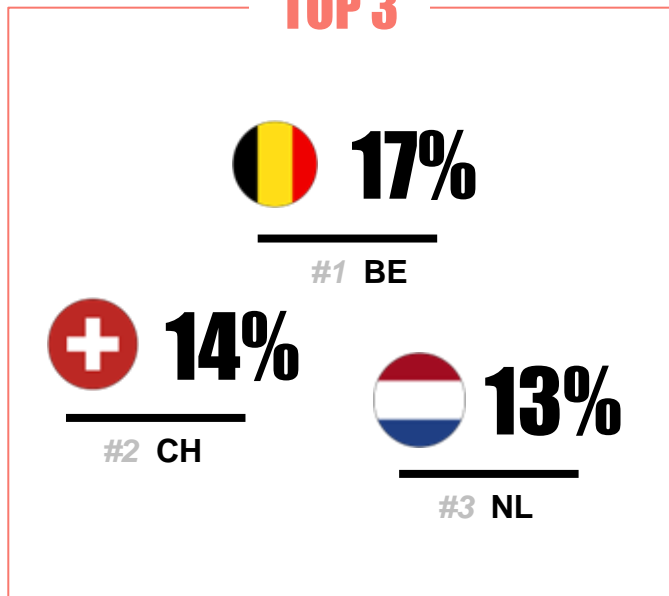
And would you give up all or part of your company cars for such alternatives?

% YES



9%

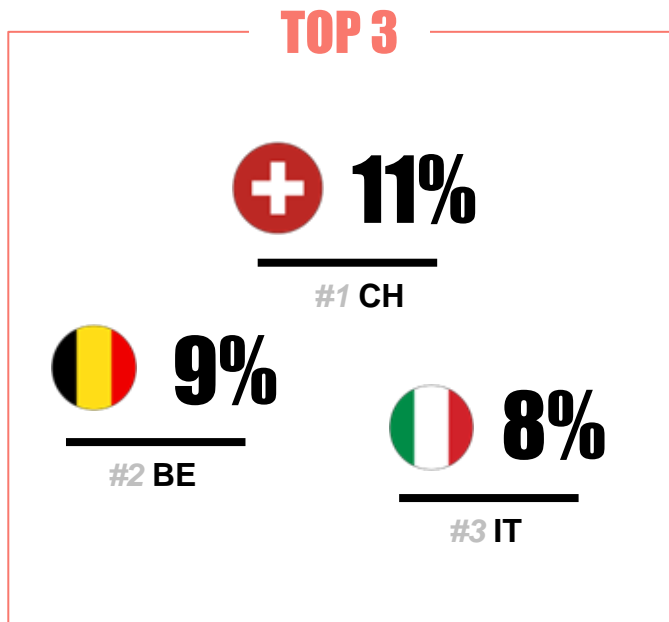
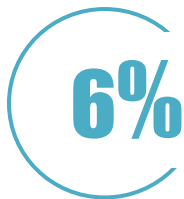
TOP 3



PROPORTION OF COMPANIES READY TO GIVE UP ALL OR PART OF THEIR COMPANY CARS FOR CAR SHARING

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

% YES



#4		FR	8%
#5		UK	8%
#6		NL	7%
#7		PL	4%
#8		PT	3%
#9		ES	3%
#10		CZ	3%
#11		DE	2%

PROPORTION OF COMPANIES READY TO GIVE UP ALL OR PART OF THEIR COMPANY CARS FOR RIDE SHARING

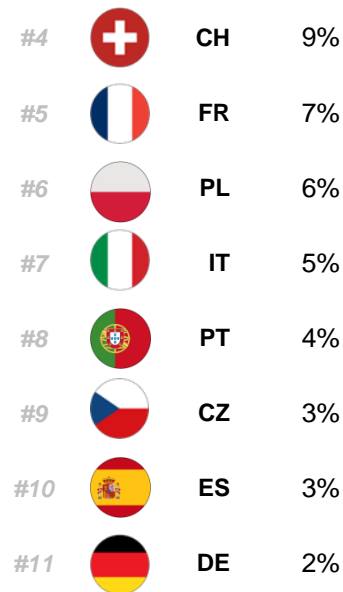
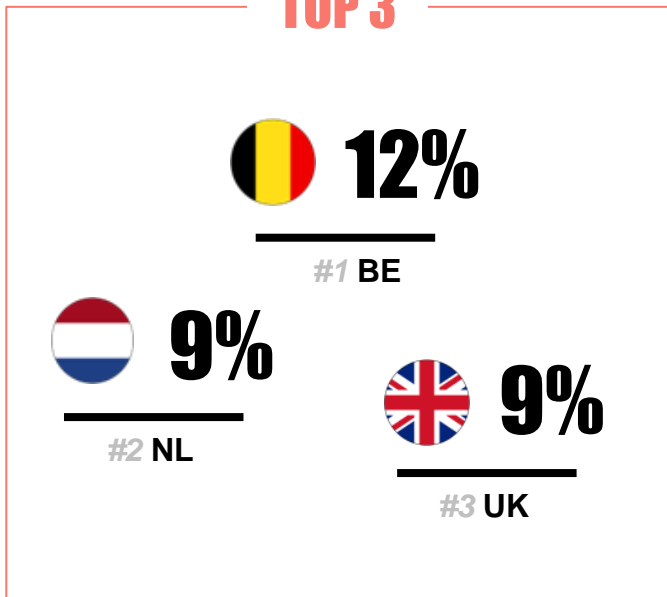
And would you give up all or part of your company cars for such alternatives?

% YES



6%

TOP 3



THANK YOU

The logo for Corporate Vehicle Observatory. It consists of the text 'Corporate Vehicle Observatory' in a green, sans-serif font. The text is centered between two thick, curved green lines that form a partial oval shape. The entire logo is contained within a white rectangular box with a thin border.

Corporate Vehicle
Observatory