



Arval Mobility
Observatory

2020 FLEET BAROMETER

Belgium

2020 FLEET BAROMETER

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What are the main characteristics of the fleets?

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How companies are financing their fleet?

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What are the usages in terms of telematics, digital tools and road safety equipments?

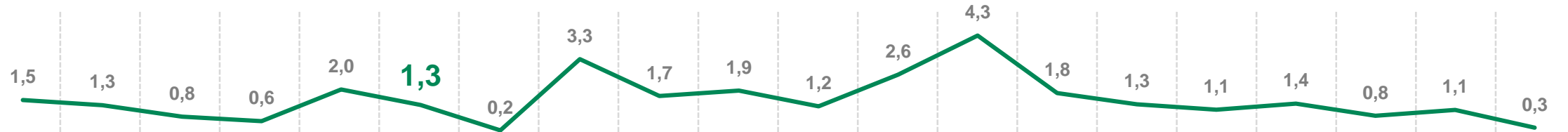
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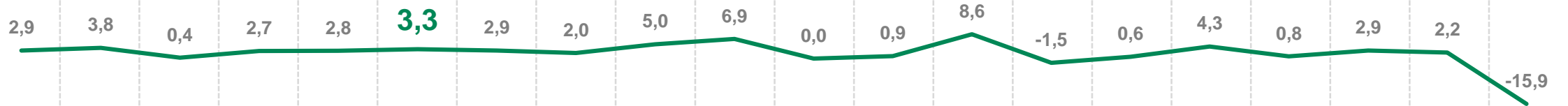
1 CONTEXT AND METHODOLOGY

GLOBAL ECONOMIC CONTEXT PER COUNTRY

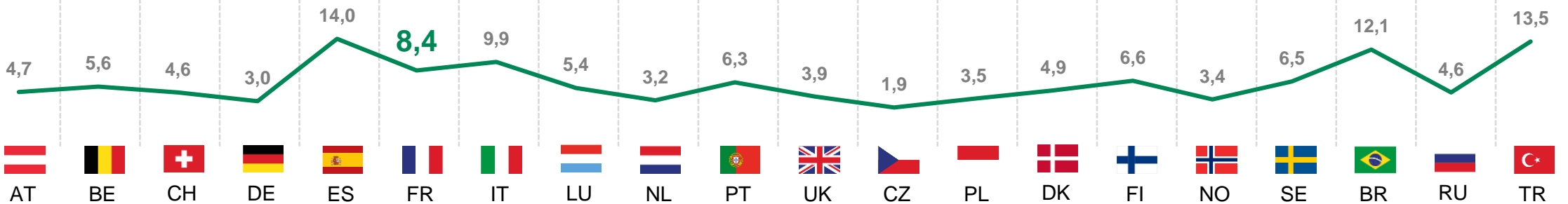
GDP growth in volume in 2019 (Source OCDE)



Investment growth in volume in 2019 (Source OCDE)



Unemployment rate (source ILO)



KEY THEMES FOR ARVAL MOBILITY OBSERVATORY



1

WHAT SHORT TERMS
SHIFTS ARE SHAPING THE
MARKET?



2

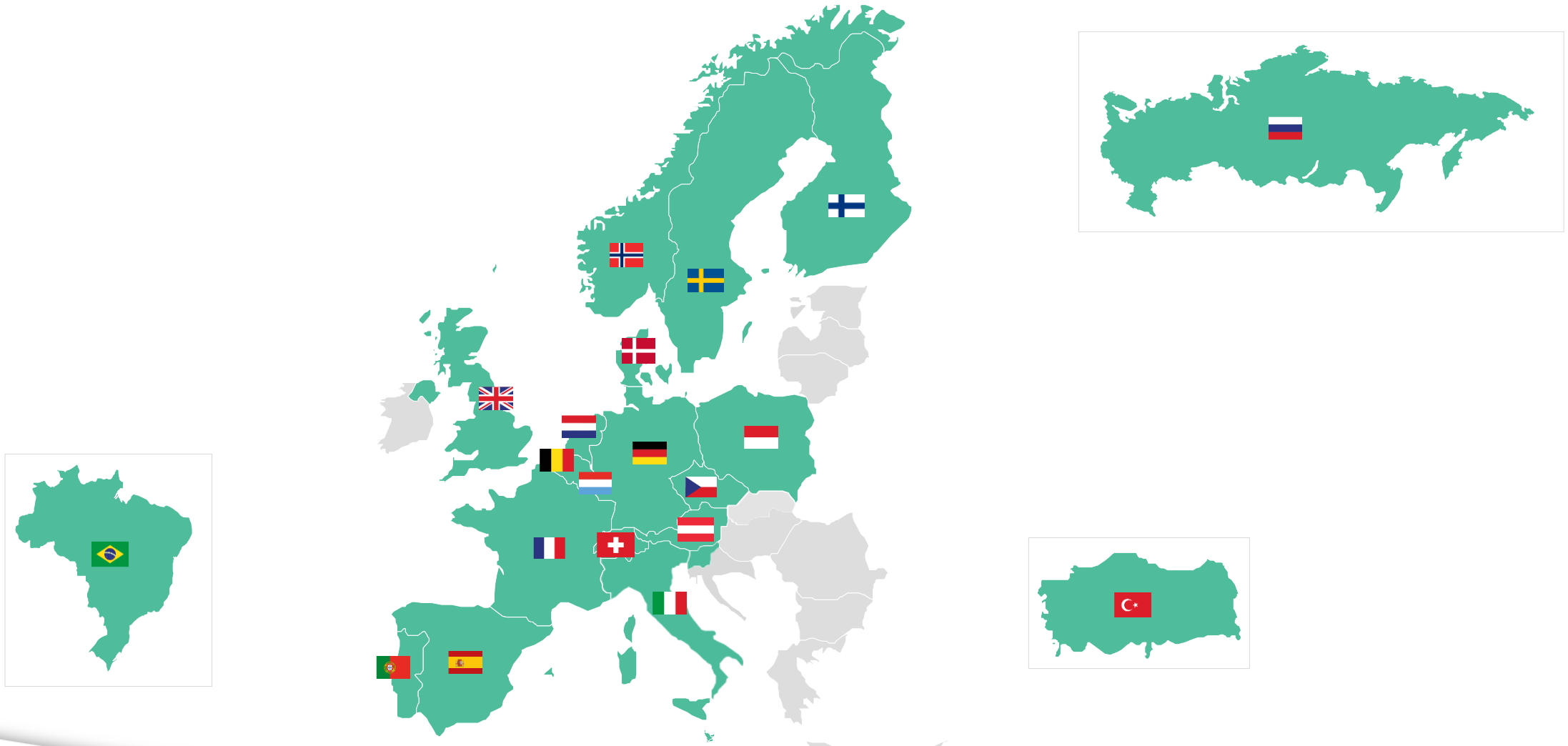
WHAT KIND OF VEHICLES
WILL THE MARKET
EXPECT IN 5 YEARS?



3

HOW WILL NEW MOBILITY
SOLUTIONS AFFECT
BUSINESS MODELS?

PERIMETER OF THE STUDY



METHODOLOGY



DATA COLLECTION METHOD



FIELDWORK PERIOD



TARGET



QUOTAS



SAMPLE

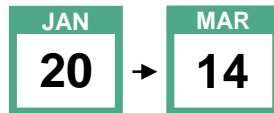


DURATION OF INTERVIEW

MIX OF 2 DATA COLLECTION MODES

1. CATI SYSTEM
(Computer Assisted Telephone Interviewing)

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



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

COMPANY SIZE & SECTOR

4 794 | through Europe
806 | out of Europe

5 600 | Interviews in total

20 minutes on average

NUMBER OF INTERVIEWS CONDUCTED IN BELGIUM

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



Companies with less than 10 employees
77 INTERVIEWS



Companies with 10 to 99 employees
78 INTERVIEWS



Companies with 100 to 499 employees
74 INTERVIEWS

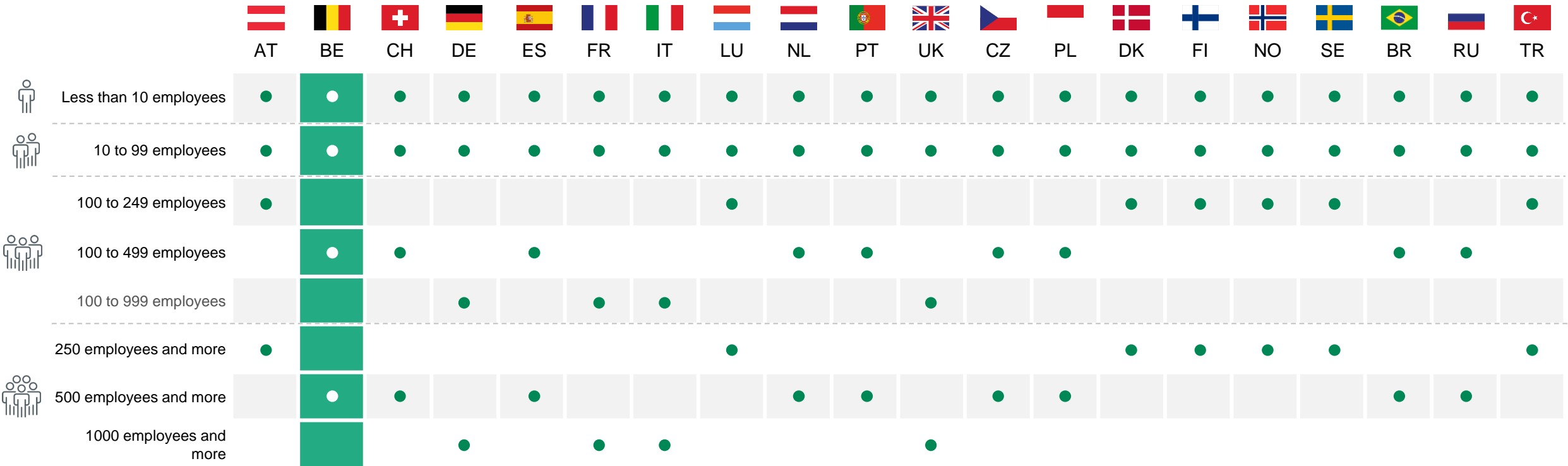


Companies with 500 employees and more
77 INTERVIEWS

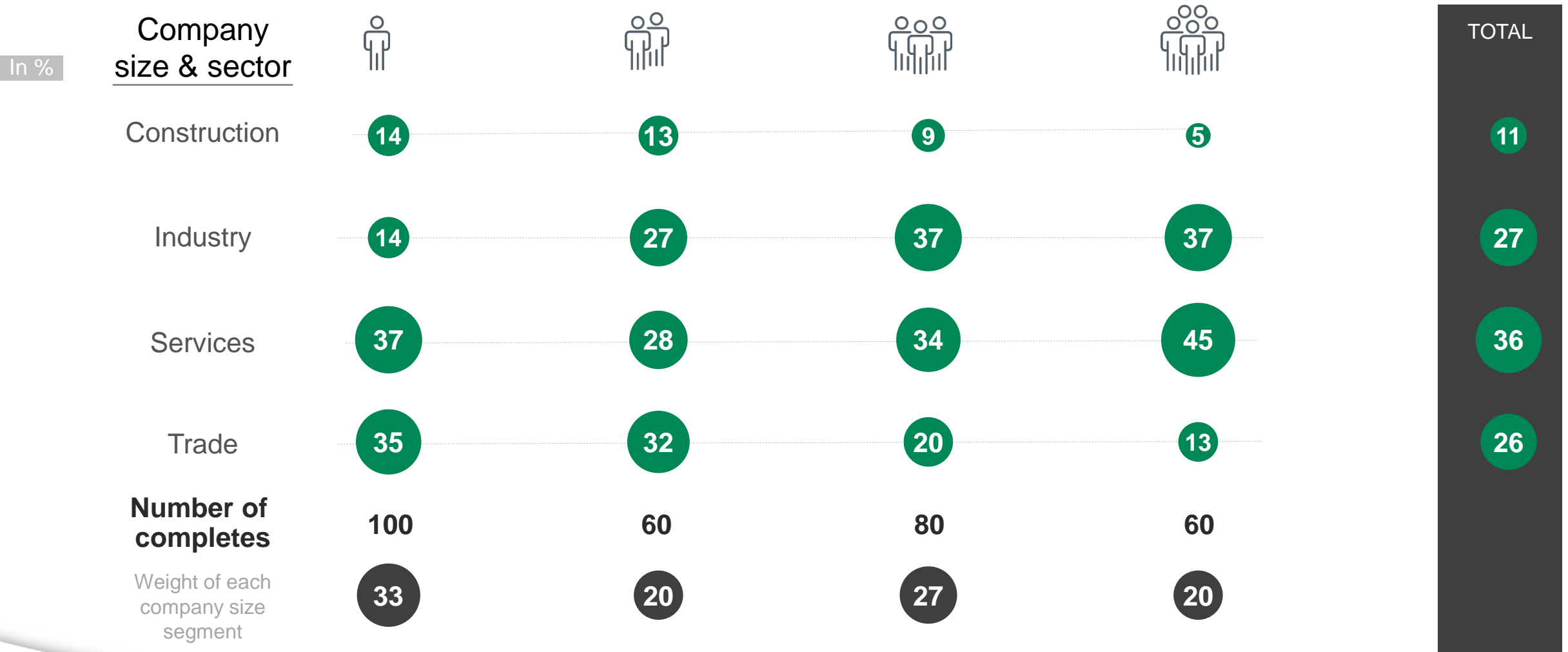
**1 to 99
employees
155 INTERVIEWS**

**100 employees
and more
151 INTERVIEWS**

COMPANY SIZE SEGMENT DEFINITION



SAMPLE STRUCTURE IN BELGIUM



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

MOBILITY ALTERNATIVES LIST AND DEFINITIONS



CORPORATE CAR SHARING:

the company makes available upon reservation vehicles for its employees via an external solution



RIDE SHARING BETWEEN EMPLOYEES: several employees in the same car for a journey to the same destination (ComOn, Blablacar, Commuty)



BIKE SHARING



OTHER 2 WHEELS SOLUTIONS (motorbike, motorized scooters,...) or micro-mobility (kick scooter)



PUBLIC TRANSPORT



MOBILITY BUDGET within a predefined budget usually granted by the employer allowing employees to choose any mobility mode that is available on the market



MOBILITY CARD PROVIDED BY THE EMPLOYER: employees can use it to book, pay, use any mobility mode available on their country (Xximo card...)



AN APP TO BOOK MOBILITY SOLUTIONS (travel planning, payments for your transport...)



PRIVATE LEASE OR SALARY SACRIFICE (by private lease we mean the fact that an employee rents or lease a car on his own behalf. By salary sacrifice I mean the fact that an employee rents or lease a car via his employer)



PROVIDE MID-TERM RENTAL VEHICLES (a rental for between 1 to 24 months) to provide transport needs for an employee



2 MAIN RESULTS

GLOBAL COUNTRY INSIGHT: A DYNAMIC MARKET, BEING RESHAPED ON ALL FRONTS BY BIG – AND ALSO SMALLER – COMPANIES

GLOBAL COUNTRY INSIGHT: A DYNAMIC MARKET, BEING RESHAPED ON ALL FRONTS BY BIG – AND ALSO SMALLER – COMPANIES

#1

THE FLEET SIZE GROWTH TO ACCELERATE IN THE FUTURE?

#2

AN ADVANCED MARKET IN THE ENERGY TRANSITION, with a particular dynamism from smaller companies

#3

MOBILITY ALTERNATIVES ARE CHALLENGING THE CORPORATE CAR FLEET

#4

OPERATING LEASING STILL THE MOST USED FINANCING SOLUTION, together with self purchase

#5

AN ADVANCED MARKET IN THE USAGE OF TELEMATICS TOO, for control and safety reasons first



3

WHAT ARE THE MAIN CHARACTERISTICS OF THE FLEETS?

INSIGHT#1: THE FLEET SIZE GROWTH TO ACCELERATE IN THE FUTURE?

INSIGHT 1: THE FLEET SIZE GROWTH TO ACCELERATE IN THE FUTURE?

1

- Belgian fleets are bigger than European average with 180 vehicles per fleet, vs. 107 in Europe on average. There is both a higher proportion of companies with passenger cars and companies with LCVs.

2

- With an average of 5.6 years, possession length is very similar to the rest of Europe (5.4). However, possession length can vary depending on the size of the company: large companies tend to use their vehicles longer, when compared to the same size European companies (5.6 years vs 4.9), while very small companies tend to keep them a shorter time (5,8 years vs 6.2). This may imply a greater stake for bigger companies in the transition towards alternative fuel technologies.

3

- LCVs follow the same trends, being kept a shorter time within small companies, and a longer time within the largest ones.

4

- Belgian fleet market has a high growth potential, with a positive balance of 26% of the companies expecting their fleet size to grow in the future (vs EU 28%, and vs. 12% last year). This accelerating growth is driven by companies that expect a development in their activity first. Car related advantage is also attractive and a real lever in the recruitment process: 49% think it support new talents recruitment and 34% think it help them to retain employees.

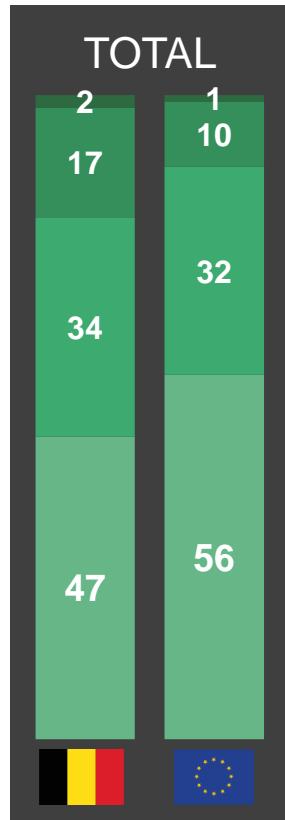
NUMBER OF VEHICLES IN FLEET

In %



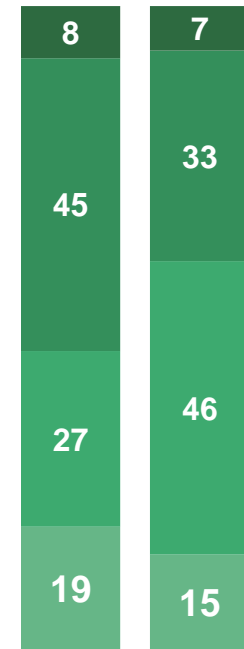
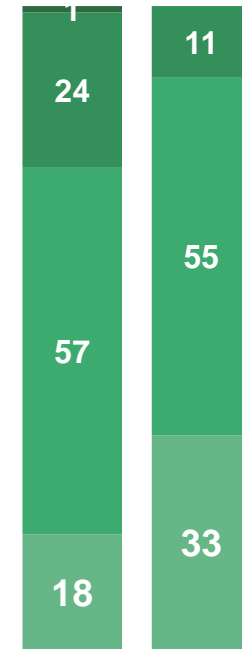
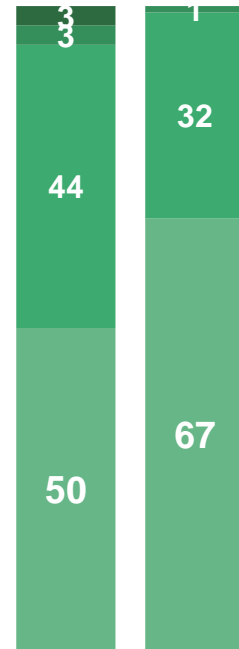
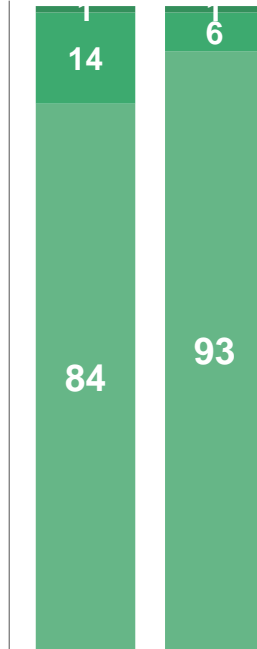
Passenger cars + LCVs

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



Average number of vehicles

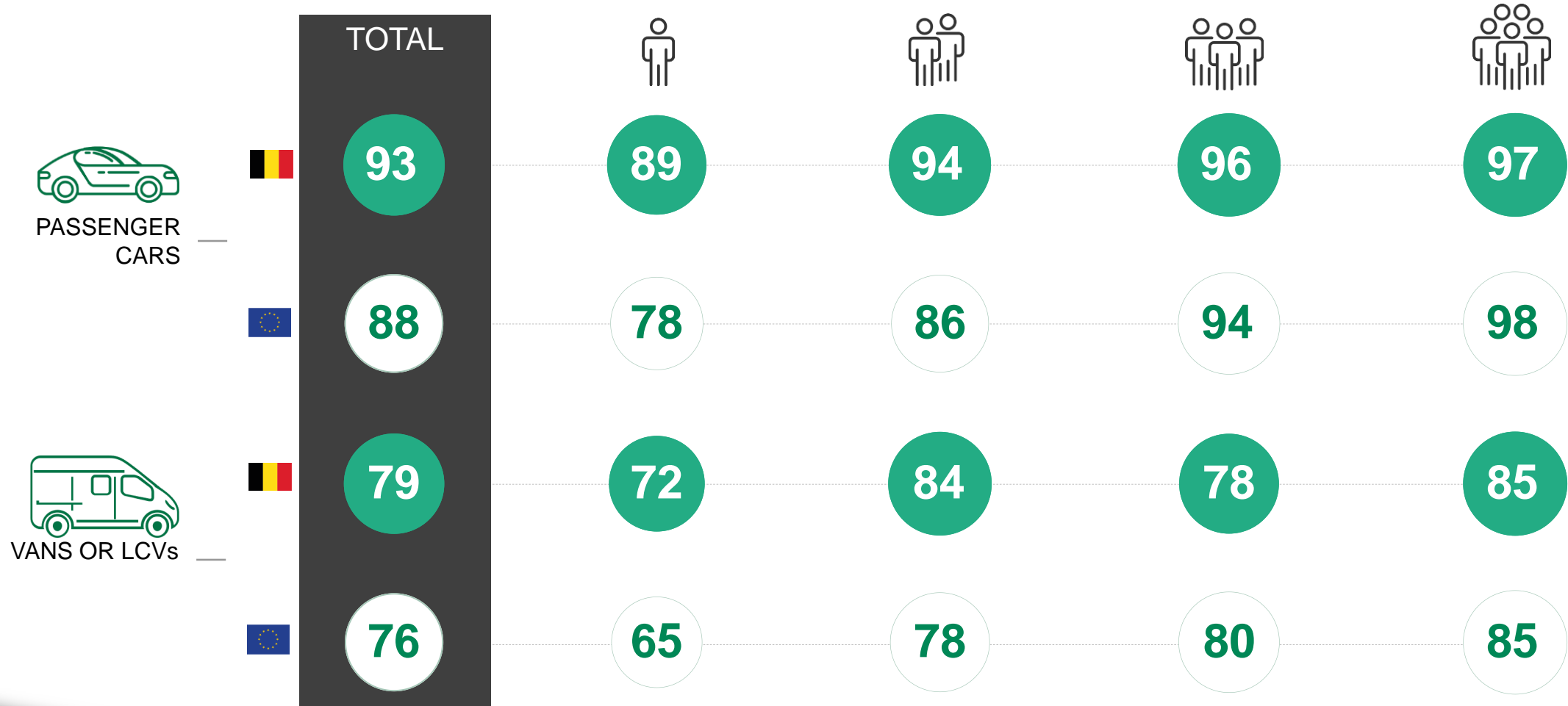
180 vehicles 107 vehicles



Can you please tell me 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 %



Basis: companies with corporate vehicles = 100%

NUMBER OF PASSENGER CARS IN FLEET

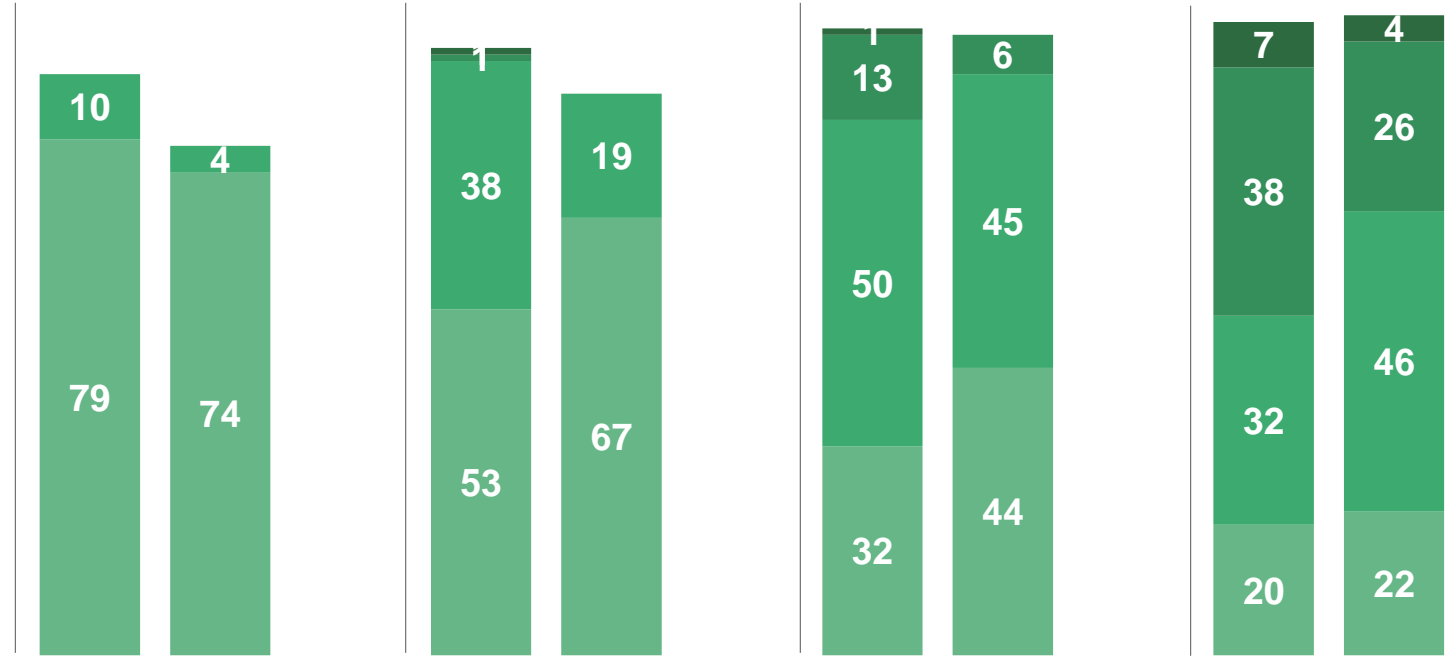
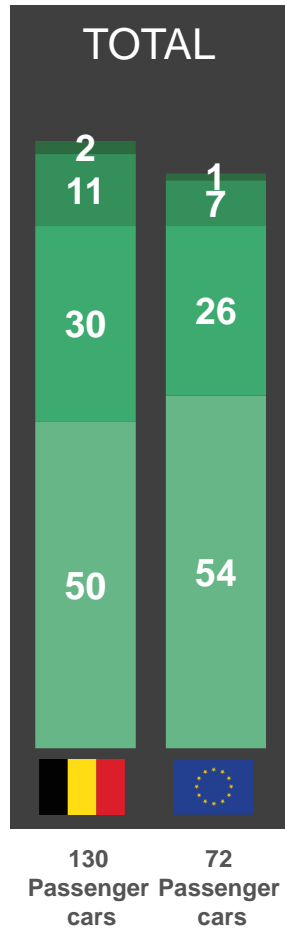
In %



Passenger cars

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

Average number of passenger cars



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

NUMBER OF LCVS IN FLEET

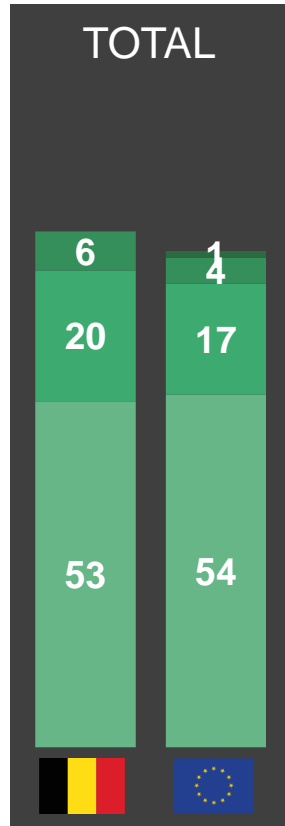
In %



LCVs

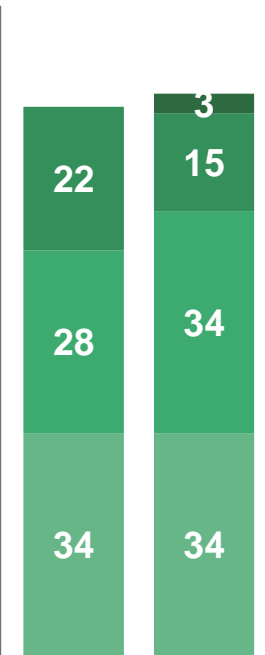
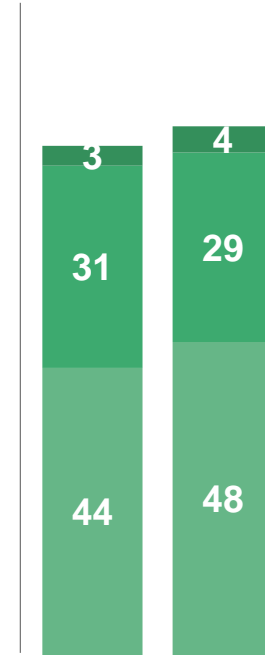
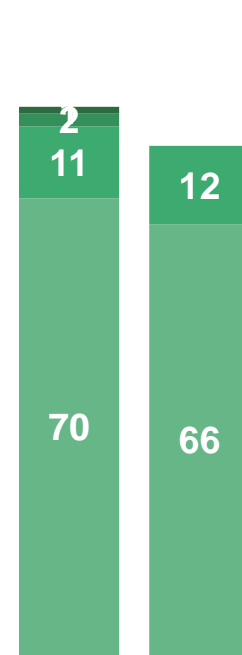
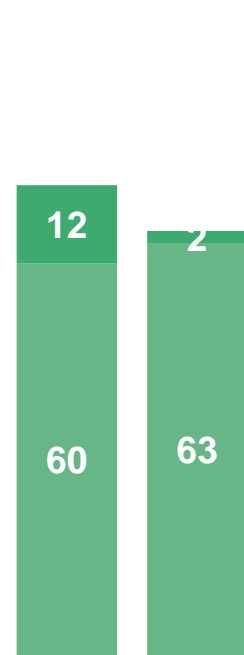
- 1000 vehicles and more
- 100 to 999 vehicles
- 10 to 99 vehicles
- 1 to 9 vehicles

Average number of LCVs



49 LCV

35 LCV



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

VEHICLE POSSESSION LENGTH



AVERAGE IN YEARS



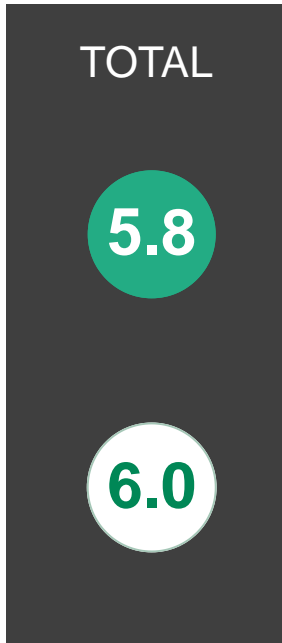
On average, how long do you keep your vehicles (before being sold or giving back to the leasing company)?
Basis: companies with corporate vehicles = 100%

LCVS POSSESSION LENGTH



LCVs

AVERAGE IN YEARS



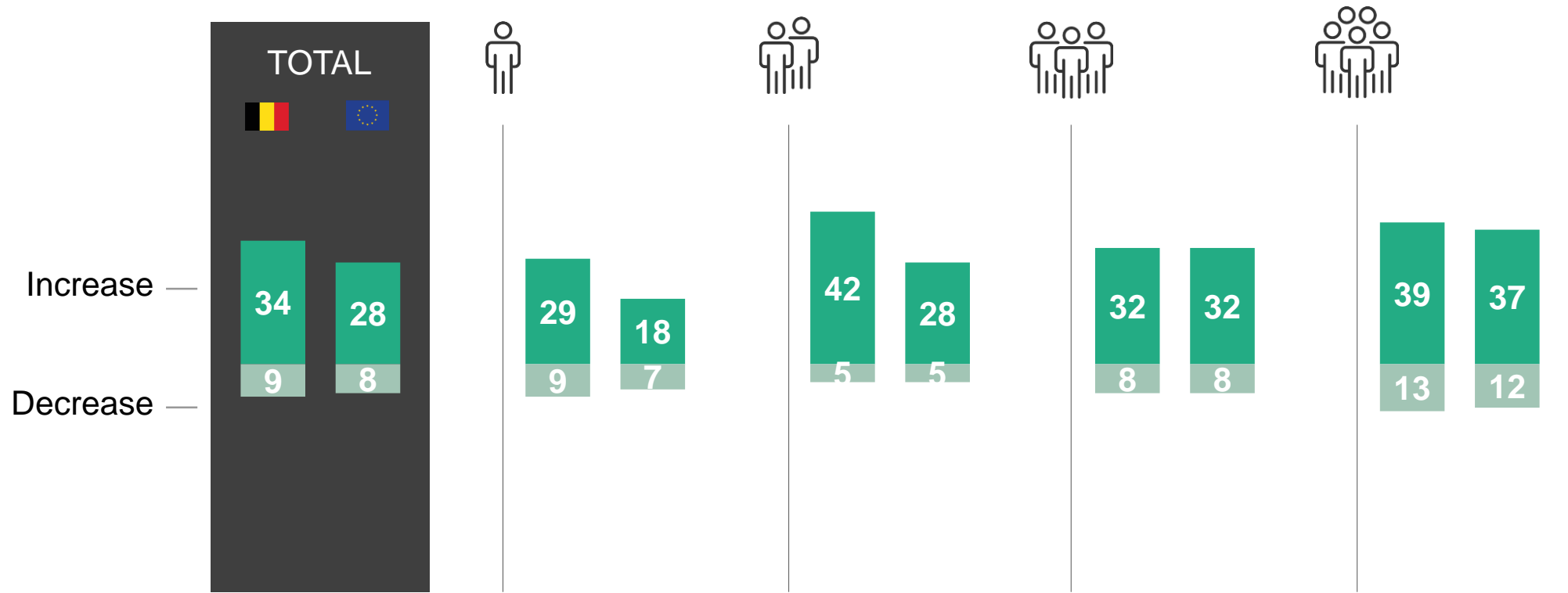
And how long do you keep your LCV, light commercial vehicles or vans (before being sold or giving back to the leasing company)?
Basis: companies with LCVS= 100 %

FLEET GROWTH POTENTIAL

In %



Passenger cars + LCVs



BALANCE in pts (INCREASE ⊖ DECREASE)



2020	+25	+20	+20	+11	+37	+23	+24	+24	+26	+25
2019	+12	+11	+2	+6	+18	+11	+19	+14	+12	+15

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

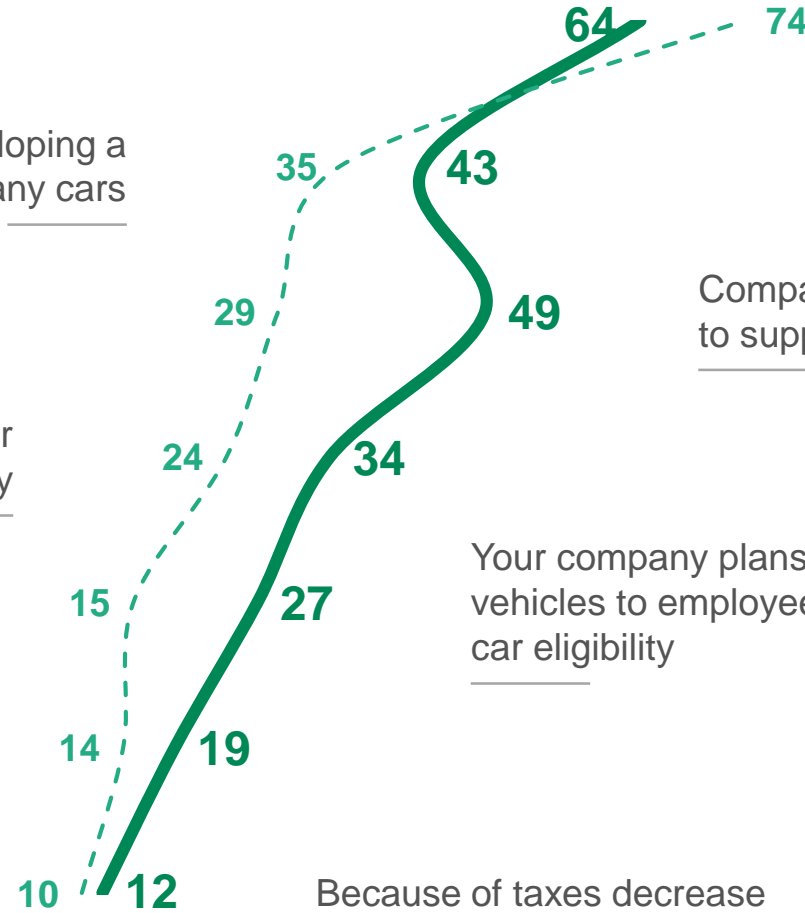
REASONS FOR FLEET FUTURE INCREASE



In %



Passenger cars + LCVs



Because your company is developing a new activity that requires company cars

Because your company is growing

Company car will be proposed in order to support new talents recruitment

Company car will be proposed in order to retain employees in your company

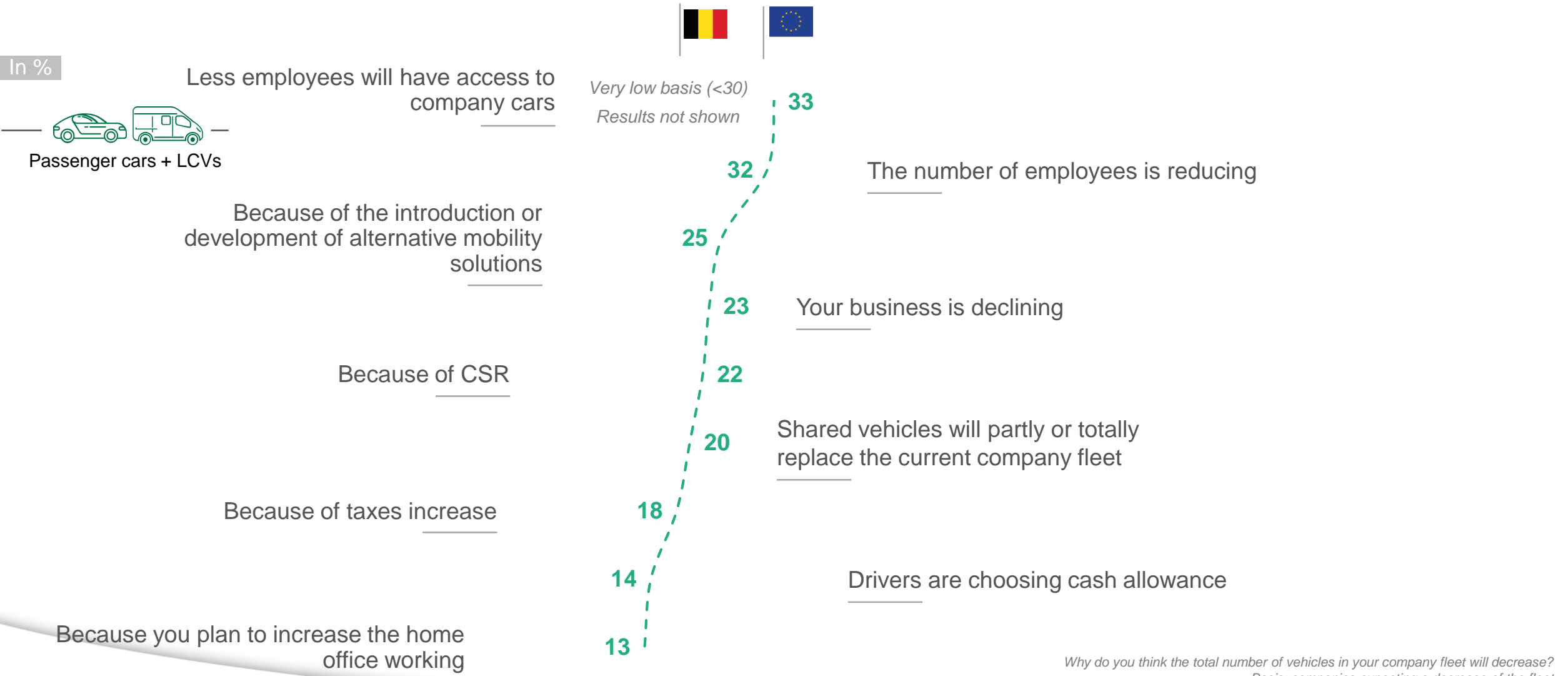
Your company plans to propose vehicles to employees with no company car eligibility

Your company plans to propose shared vehicles to employees

Because of taxes decrease

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

REASONS FOR FLEET FUTURE DECREASE



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



4

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

INSIGHT#2: AN ADVANCED MARKET IN THE ENERGY
TRANSITION, WITH A PARTICULAR DYNAMISM FROM
SMALL COMPANIES

INSIGHT 2: AN ADVANCED MARKET IN THE ENERGY TRANSITION, WITH A PARTICULAR DYNAMISM FROM SMALL COMPANIES

1

- Belgium is a well advanced market in the energy mix transition, ranking within the top 5 European markets: 45% of Belgian companies have already implemented at least one fuel alternative. The market is expected to continue its transition: by the next 3 years, they are expected to be 72%. These implementation levels are quite similar between small, medium and large companies in Belgium. To note, the smallest companies (and especially the < 10 employees) are more numerous than their EU counterparts to have implemented at least one alternative fuel technology.

2

- Belgian companies are convinced by fuel alternatives technologies, especially for passenger cars. They implement these alternatives in order to limit carbon emission (1st reason), reduce overall costs, adapt themselves to more restrictive policies and improve their image. The reasons are similar on LCVs vehicles and in line with the rest of Europe. Their barriers concerning electric technologies are also similar to other European countries, the more expensive purchase price being the first barrier to overcome. PHEV, Hybrid and 100% Electric vehicles are the top 3 implemented alternative technologies, all chosen by approx. 1 company out of 4. These 3 technologies are also the ones that demonstrate the most important development potential over the next 3 years, since it should be implemented by half of the companies by 2023.

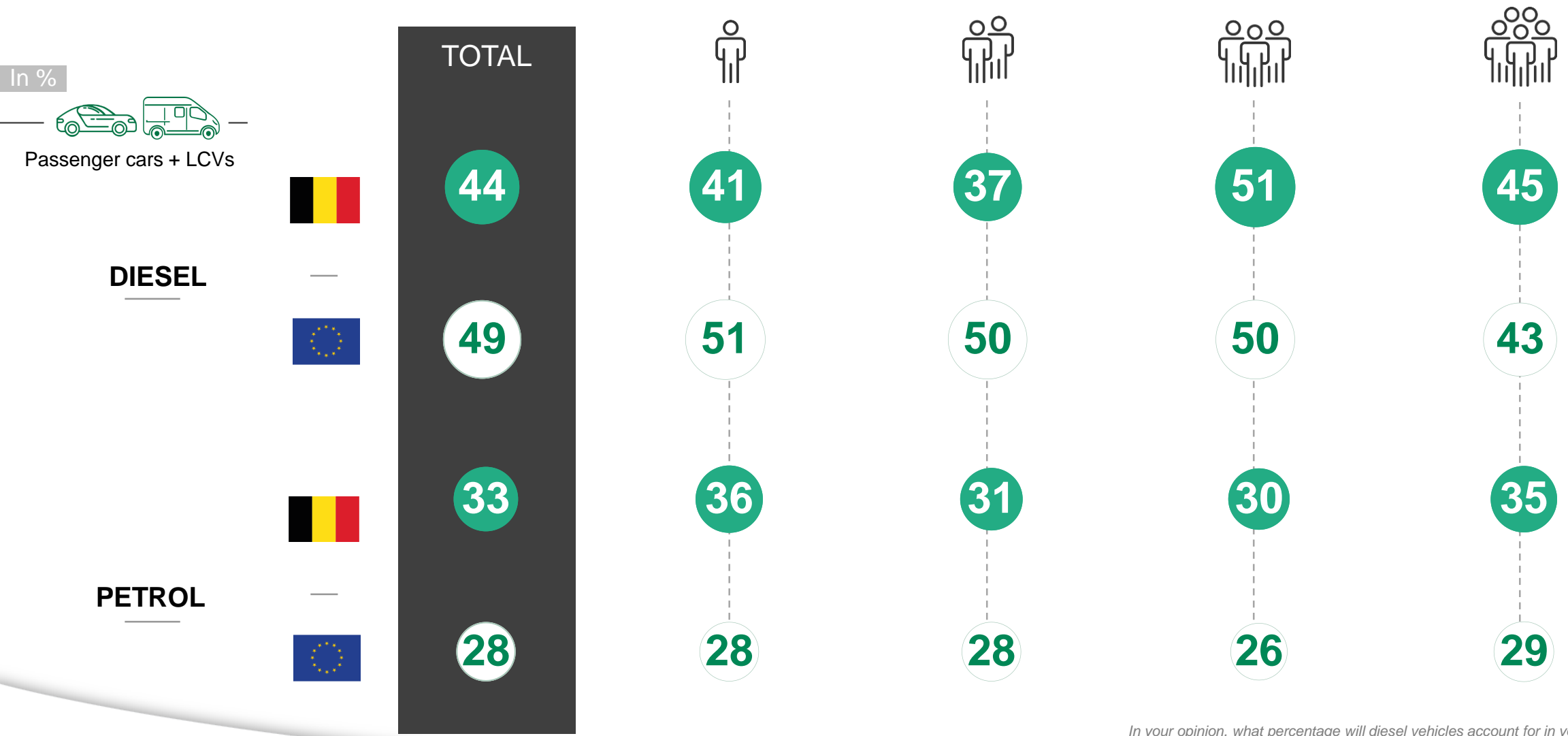
3

- These perspectives of development are now supported by companies of all sizes, the < 100 employees companies being now in line with the > 100 employees companies. This recent dynamism from the smaller companies should help and support the development of these alternative fuel technologies over the next few years.

4

- This transition represents a higher stake for bigger companies, which development is more similar to European average, as they revised downwards their 100% Electric projections (-8pts) and have an expected higher proportion of diesel and petrol vehicles in the near future.

EXPECTED PART OF PETROL AND DIESEL (NEXT 3 YEARS)



*In your opinion, what percentage will diesel vehicles account for in your fleet in 3 years?
 In your opinion, what percentage will petrol vehicles account for in your fleet in 3 years?
 Basis: companies with corporate vehicles = 100%*

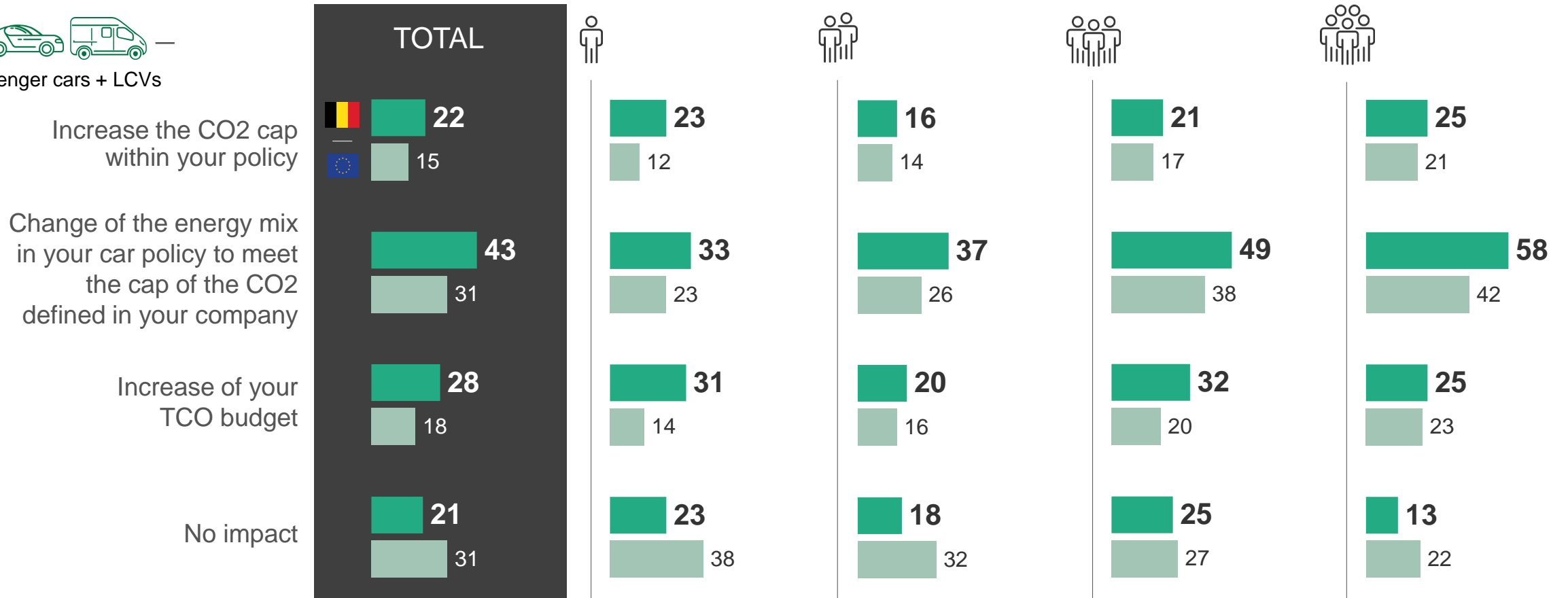
FOCUS WLTP

Actions to be taken to adapt WLTP

In %



Passenger cars + LCVs



Today, fuel consumption and CO2 emissions are determined with a new, more realistic test cycle: the WLTP-test
 What actions will be taken to adapt to the WLTP-test?
 Basis: companies with corporate vehicles = 100%

CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

At least one technology

In %



Passenger cars + LCVs



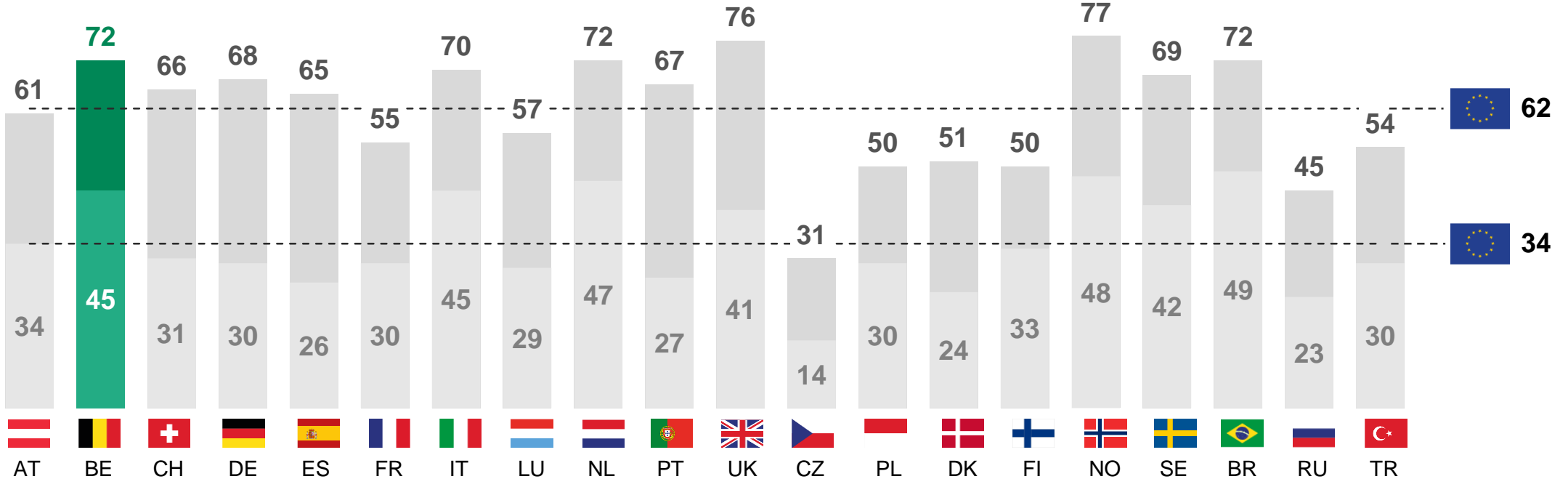
ALREADY
IMPLEMENTED
OR CONSIDER
NEXT 3 YEARS



ALREADY
IMPLEMENTED

HOW TO READ THE RESULTS ?

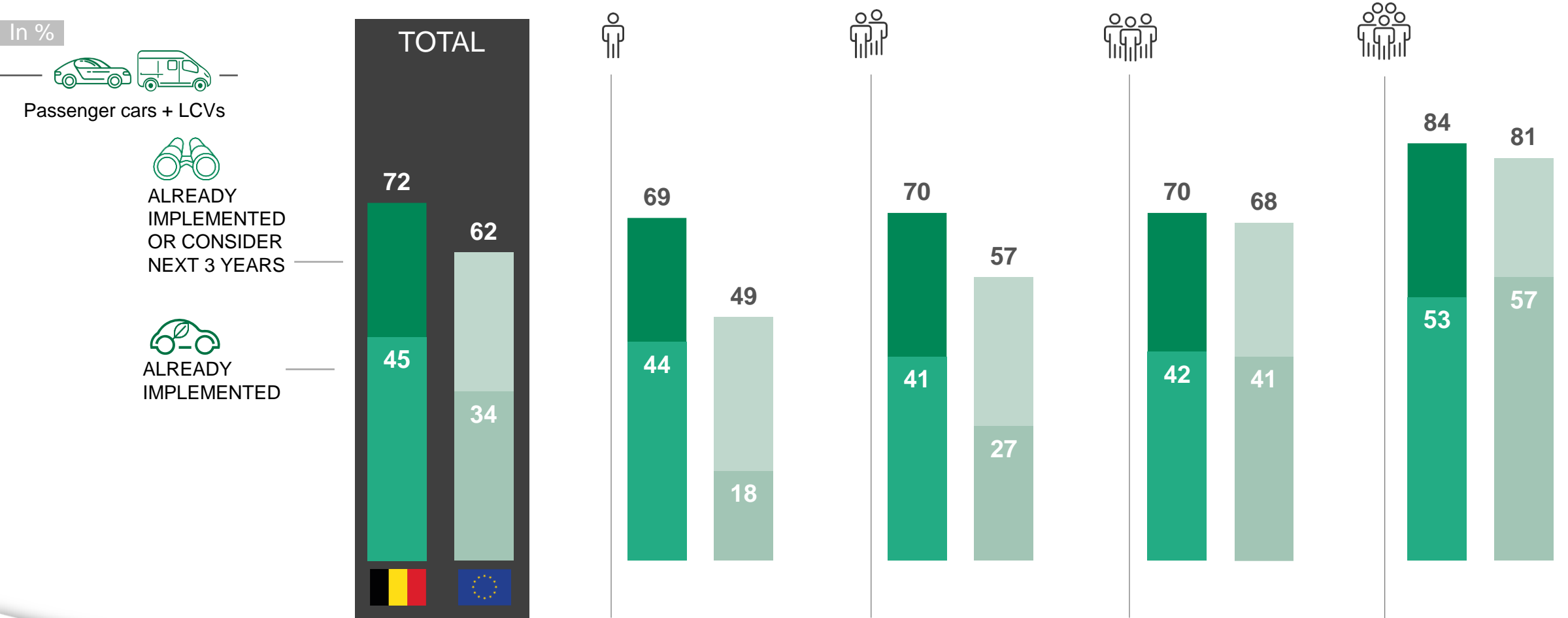
In Belgium, 72% of the companies have already implemented or consider to implement at least one alternative technology in the next 3 years. 45% have already implemented at least one.



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

CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

At least one technology



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

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

In %



Passenger cars + LCVs



ALREADY
IMPLEMENTED
OR CONSIDER
NEXT 3 YEARS



ALREADY
IMPLEMENTED

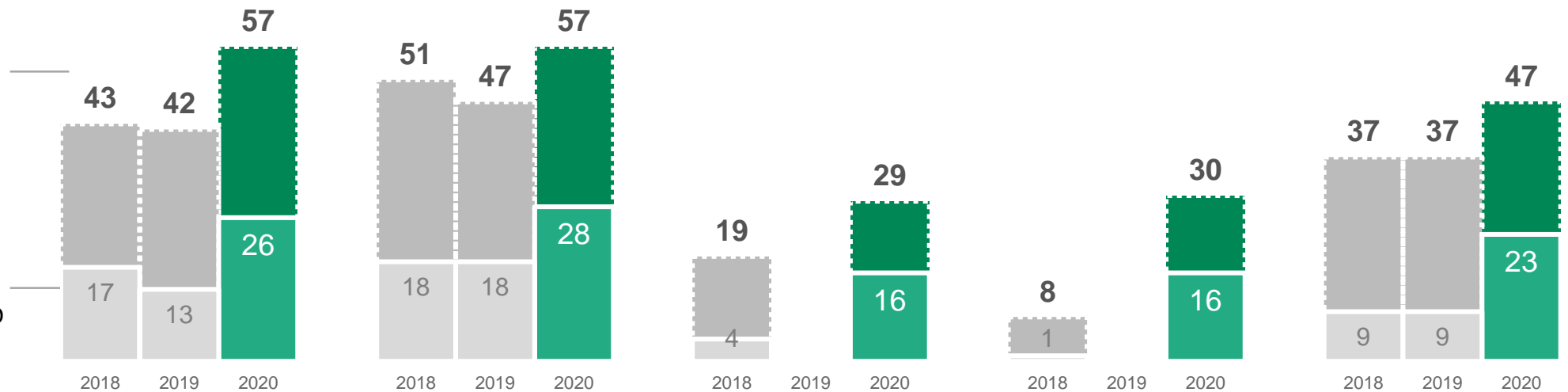
Plug-in Hybrid

Hybrid

CNG

LPG

Battery
Electric
Vehicle



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

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Focus less than 10

In %



Passenger cars + LCVs



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY IMPLEMENTED

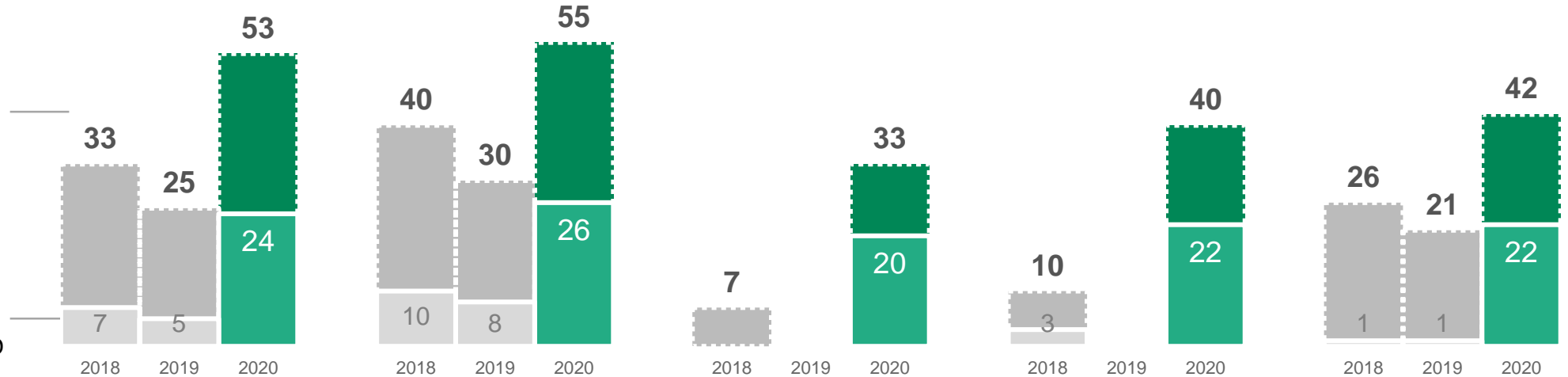
Plug-in Hybrid

Hybrid

CNG

LPG

Battery Electric Vehicle



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

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Focus 10 to 99

In %



Passenger cars + LCVs



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY IMPLEMENTED

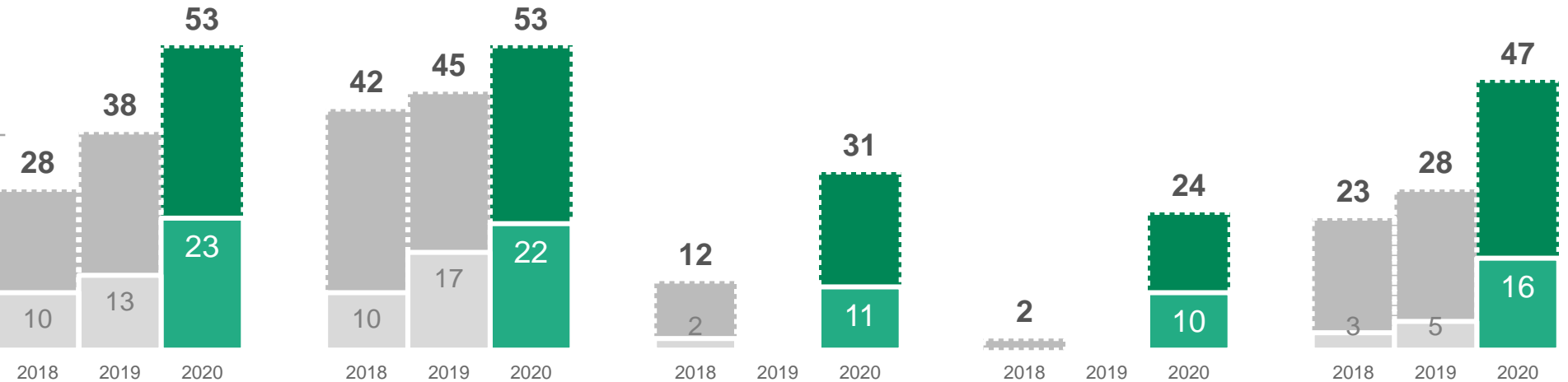
Plug-in Hybrid

Hybrid

CNG

LPG

Battery Electric Vehicle



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

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Focus 100 to 499

In %



Passenger cars + LCVs

Plug-in Hybrid

Hybrid

CNG

LPG

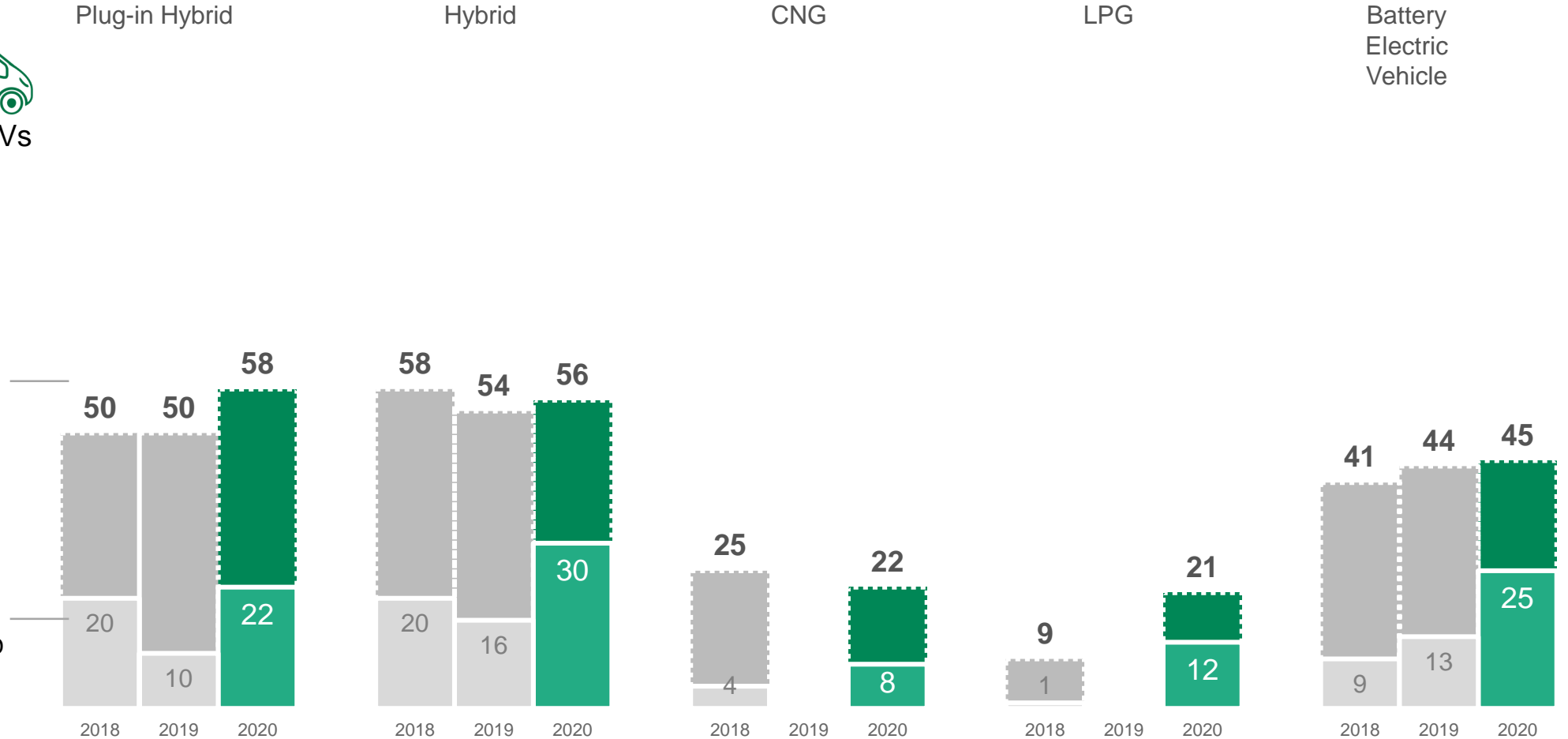
Battery
Electric
Vehicle



ALREADY
IMPLEMENTED
OR CONSIDER
NEXT 3 YEARS



ALREADY
IMPLEMENTED



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

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Focus 500 and more

In %



Passenger cars + LCVs

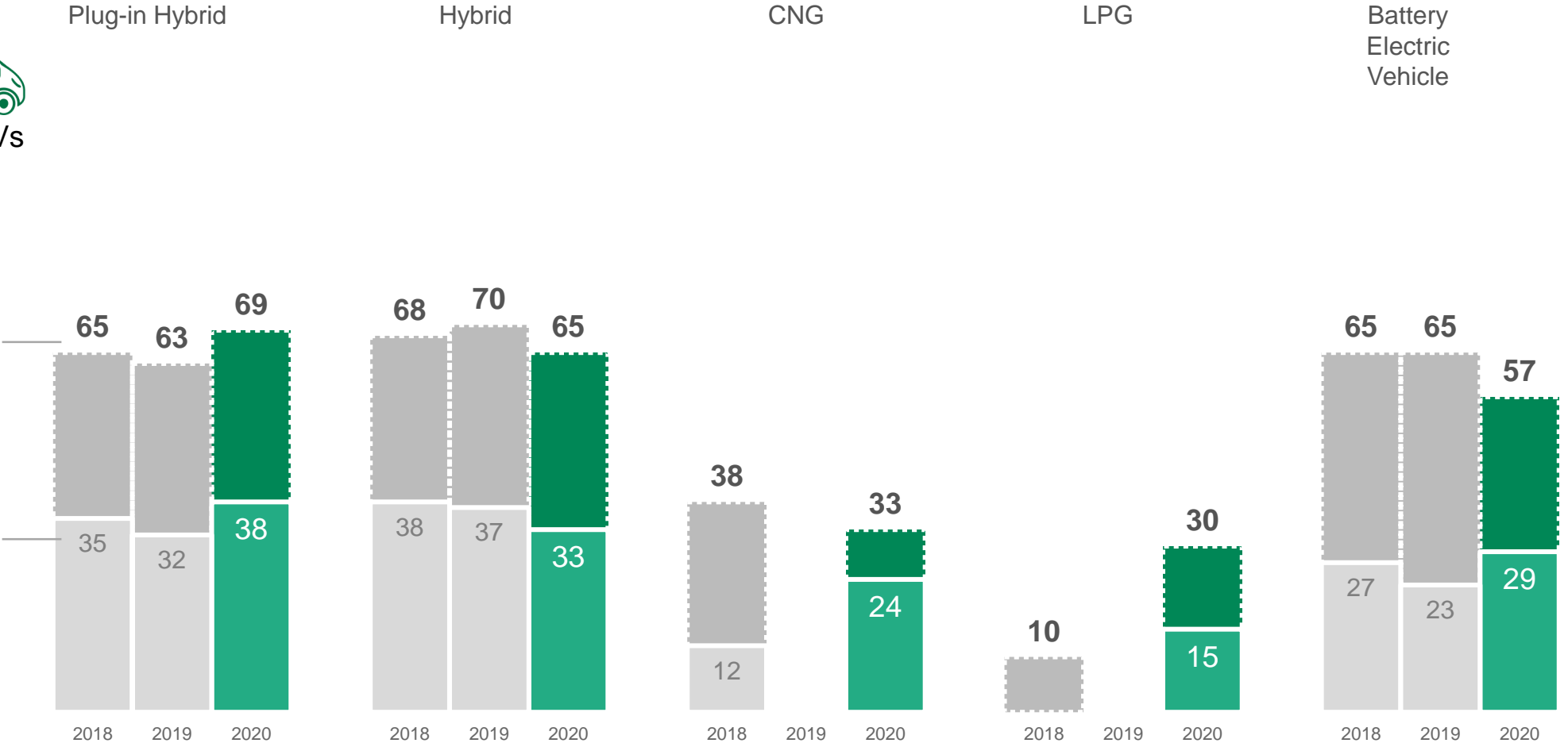
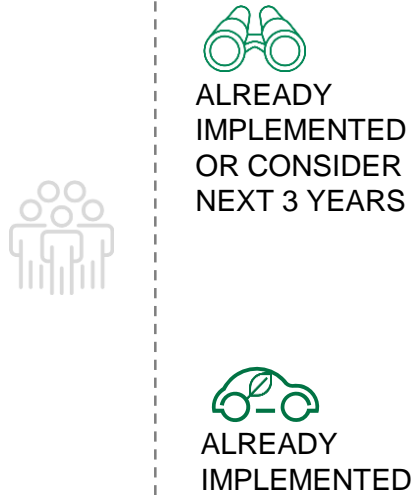
Plug-in Hybrid

Hybrid

CNG

LPG

Battery
Electric
Vehicle



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

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Focus on 1 to 99

In %



Passenger cars + LCVs



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY IMPLEMENTED

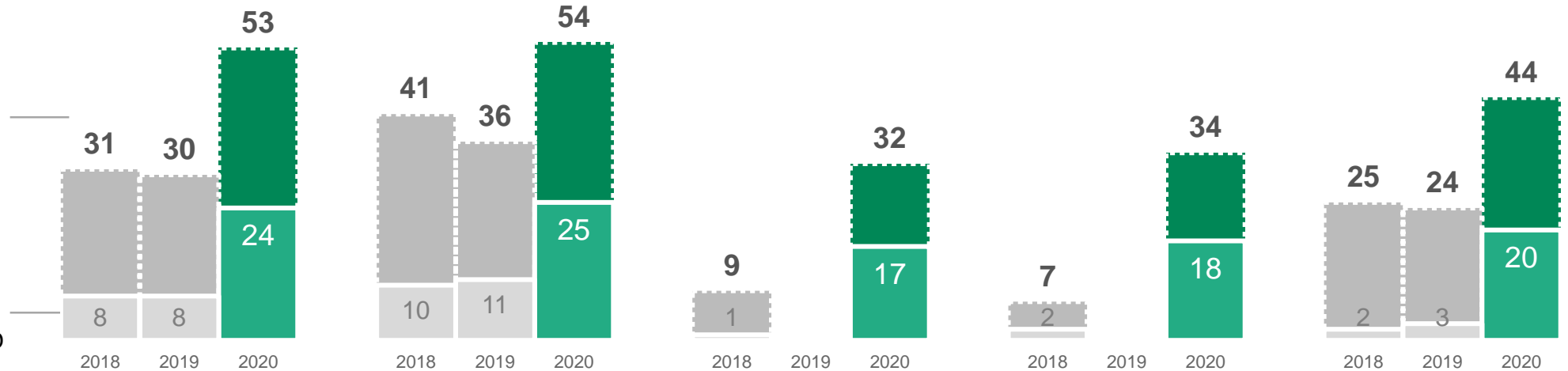
Plug-in Hybrid

Hybrid

CNG

LPG

Battery Electric Vehicle



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

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Focus on 100 and more

In %



Passenger cars + LCVs



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY IMPLEMENTED

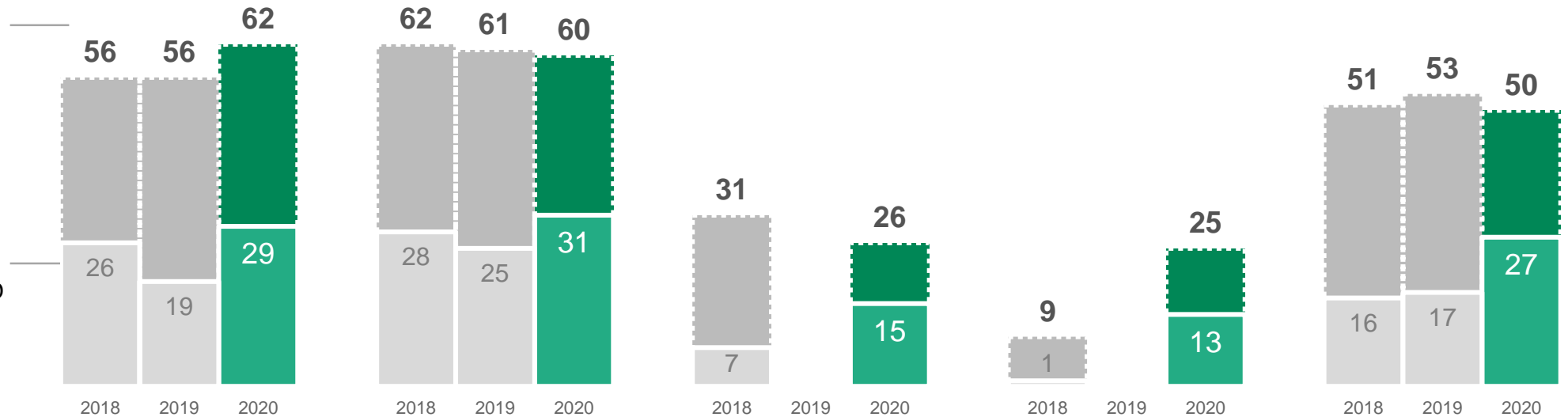
Plug-in Hybrid

Hybrid

CNG

LPG

Battery Electric Vehicle



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

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Passenger car fleet

In %



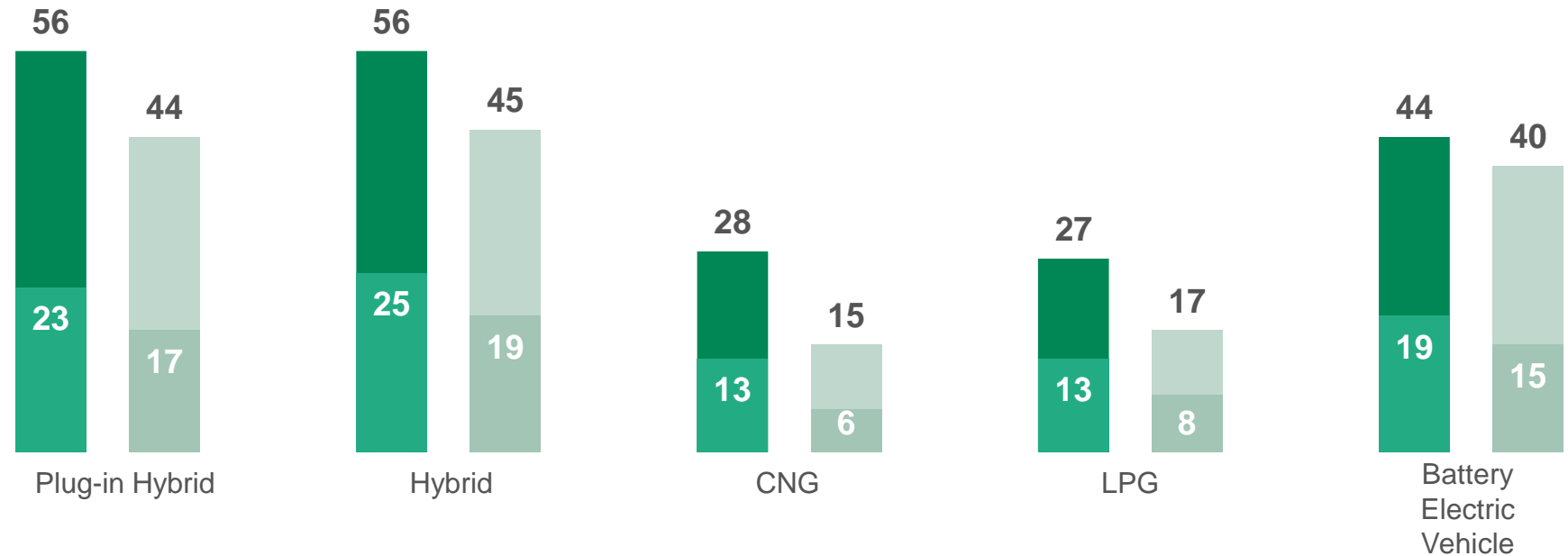
Passenger cars



ALREADY
IMPLEMENTED
OR CONSIDER
NEXT 3 YEARS



ALREADY
IMPLEMENTED



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

REASONS FOR IMPLEMENTING OR CONSIDERING ALTERNATIVE FUEL TECHNOLOGIES

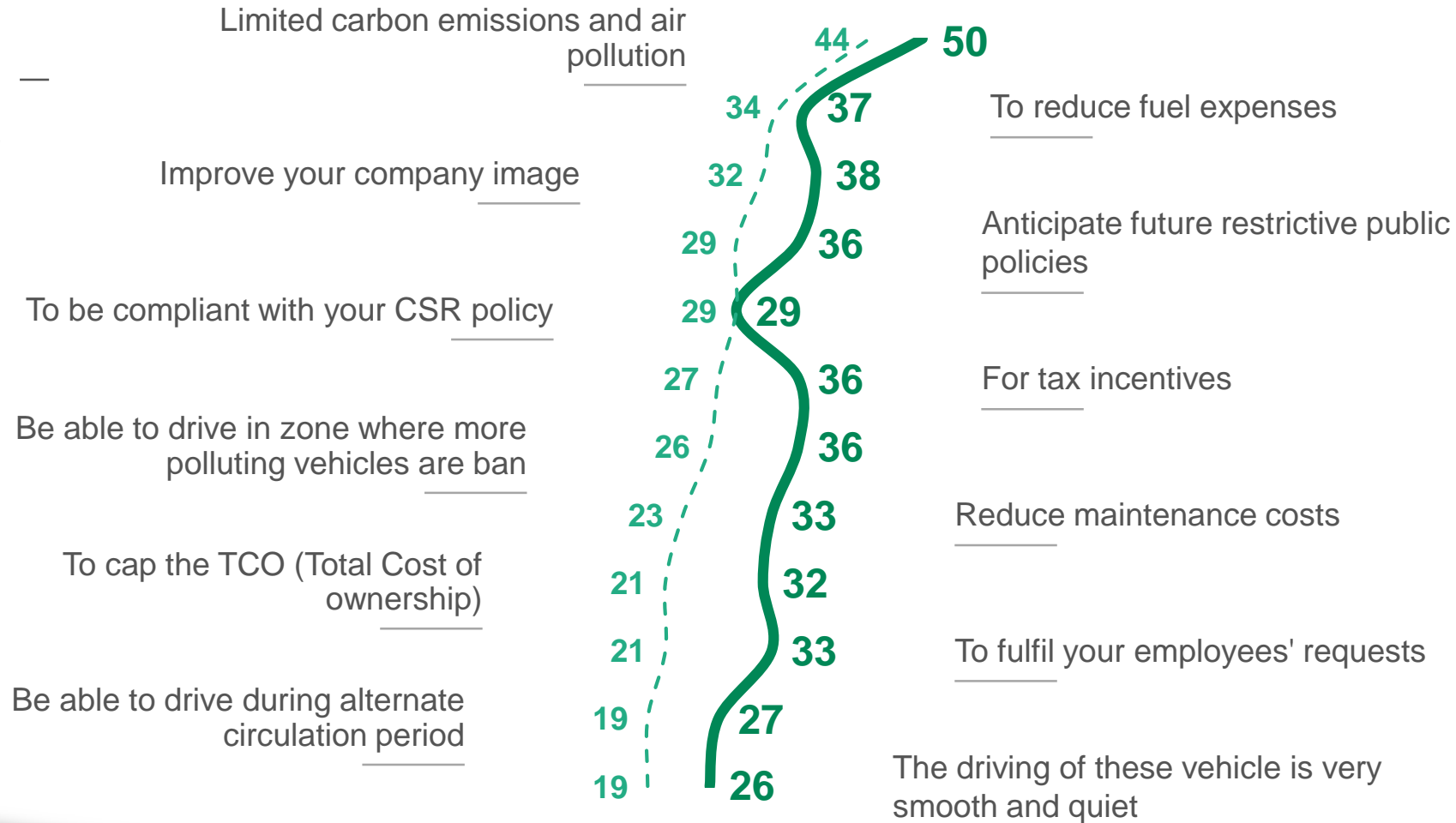
Passenger car fleet



In %



Passenger cars



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

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

LCV Fleet

In %



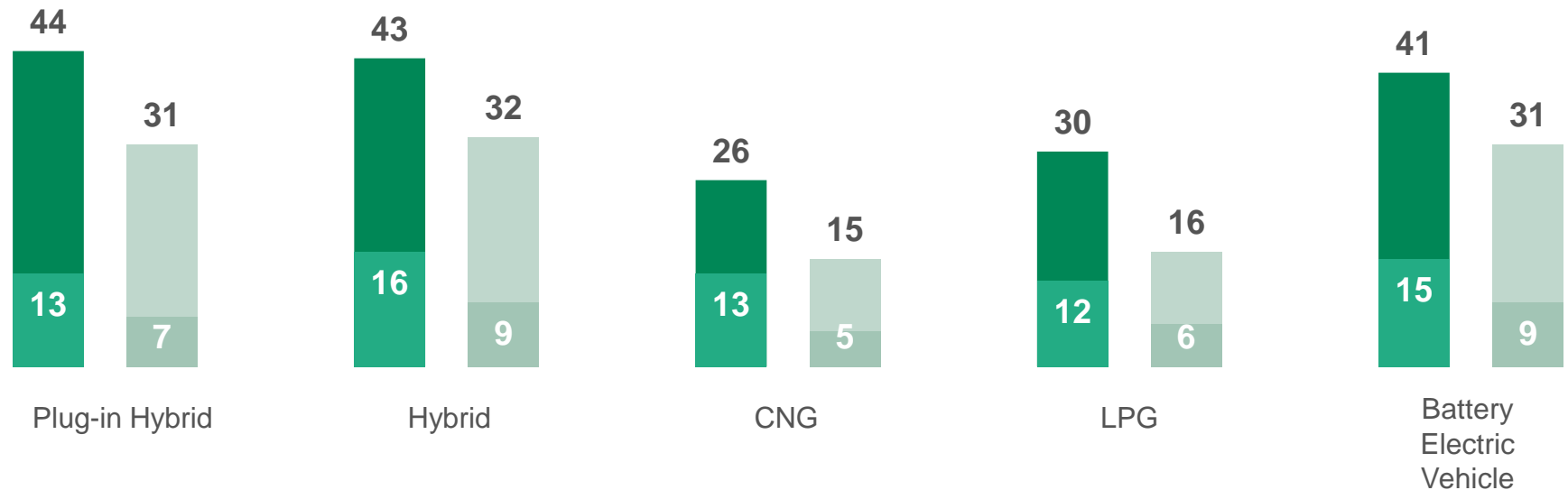
LCVs



ALREADY
IMPLEMENTED
OR CONSIDER
NEXT 3 YEARS



ALREADY
IMPLEMENTED



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

REASONS FOR IMPLEMENTING OR CONSIDERING ALTERNATIVE FUEL TECHNOLOGIES

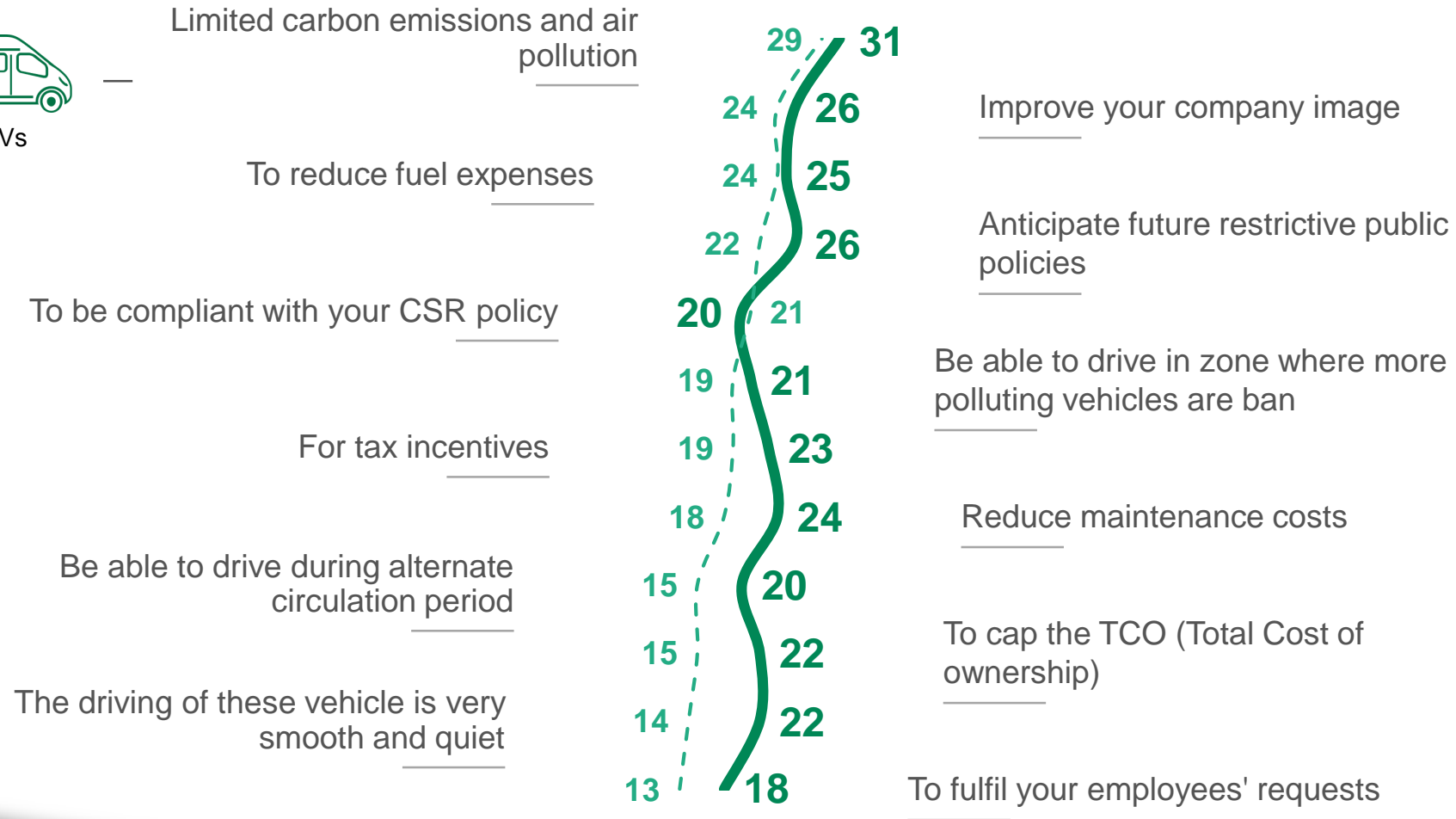
LCV fleet



In %



LCVs



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

HYBRID IMPLEMENTATION

In %



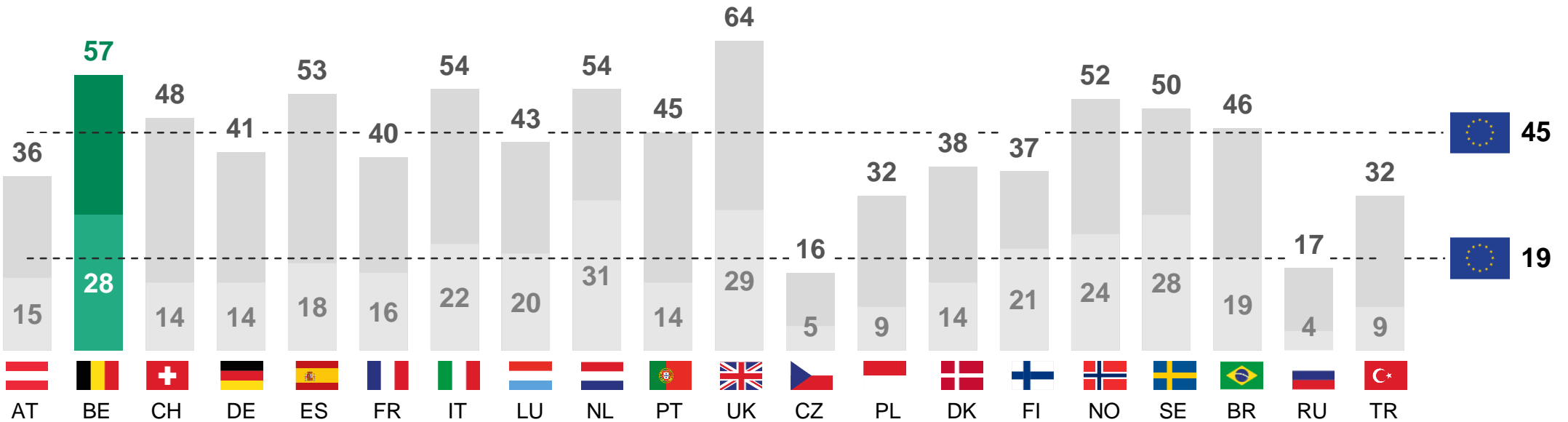
Passenger cars + LCVs



ALREADY
IMPLEMENTED
OR CONSIDER
NEXT 3 YEARS



ALREADY
IMPLEMENTED



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

HYBRID IMPLEMENTATION

In %



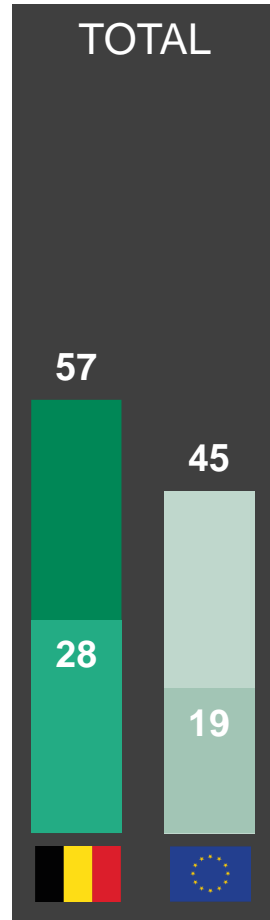
Passenger cars + LCVs



ALREADY
IMPLEMENTED
OR CONSIDER
NEXT 3 YEARS



ALREADY
IMPLEMENTED



55

26

31

8



53

22

40

13



56

30

51

25



65

33

63

35

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

PLUG-IN HYBRID IMPLEMENTATION

In %



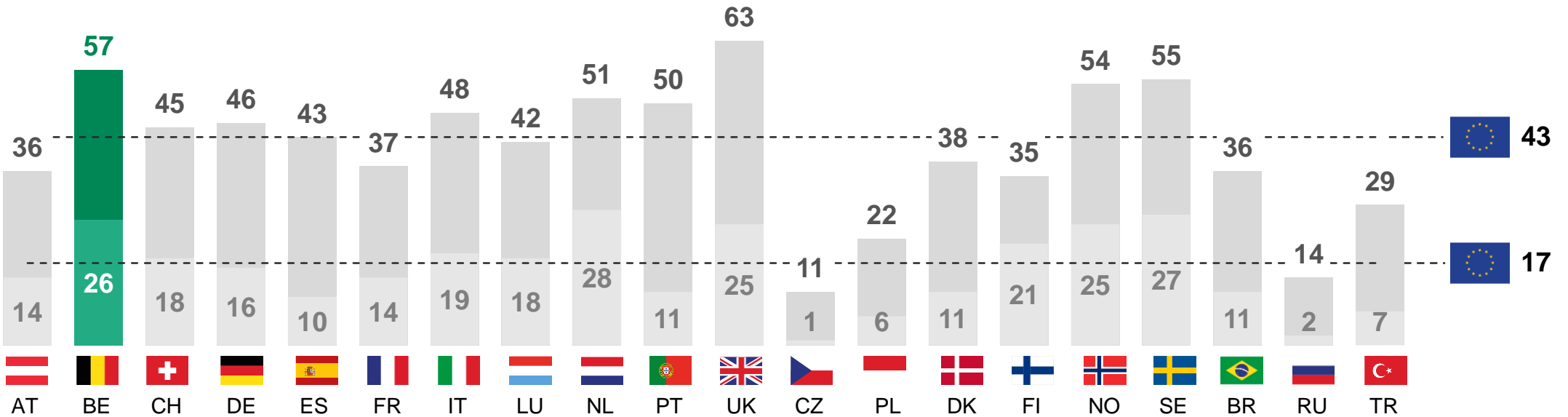
Passenger cars + LCVs



ALREADY
IMPLEMENTED
OR CONSIDER
NEXT 3 YEARS



ALREADY
IMPLEMENTED



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

PLUG-IN HYBRID IMPLEMENTATION

In %



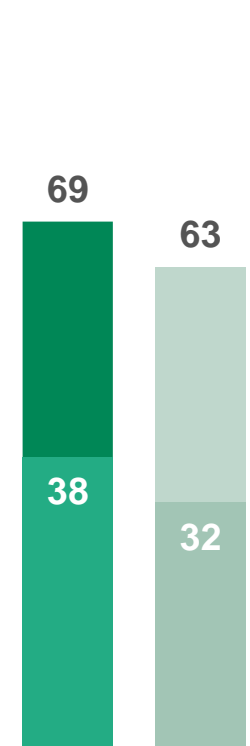
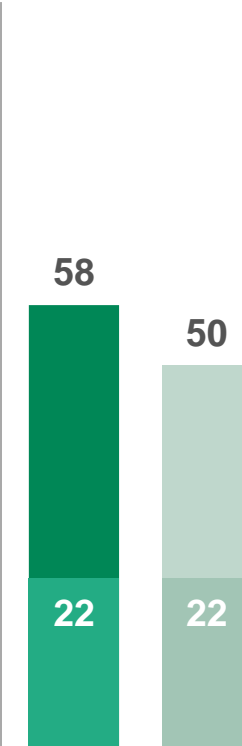
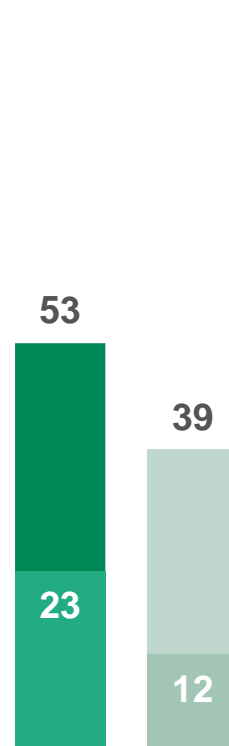
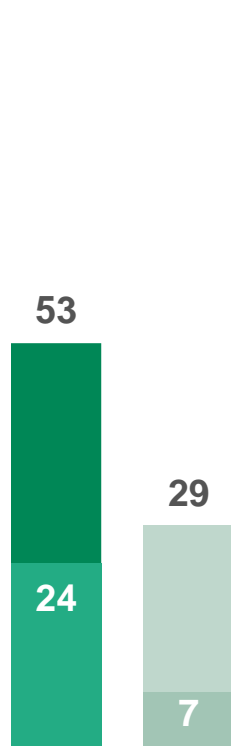
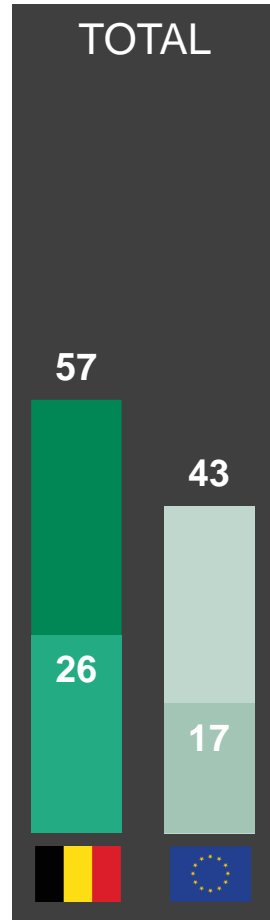
Passenger cars + LCVs



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY IMPLEMENTED



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

CONSTRAINTS OF PLUG IN HYBRID IMPLEMENTATION

In %



Passenger cars + LCVs

do not consider implementing plug-in Hybrid vehicles

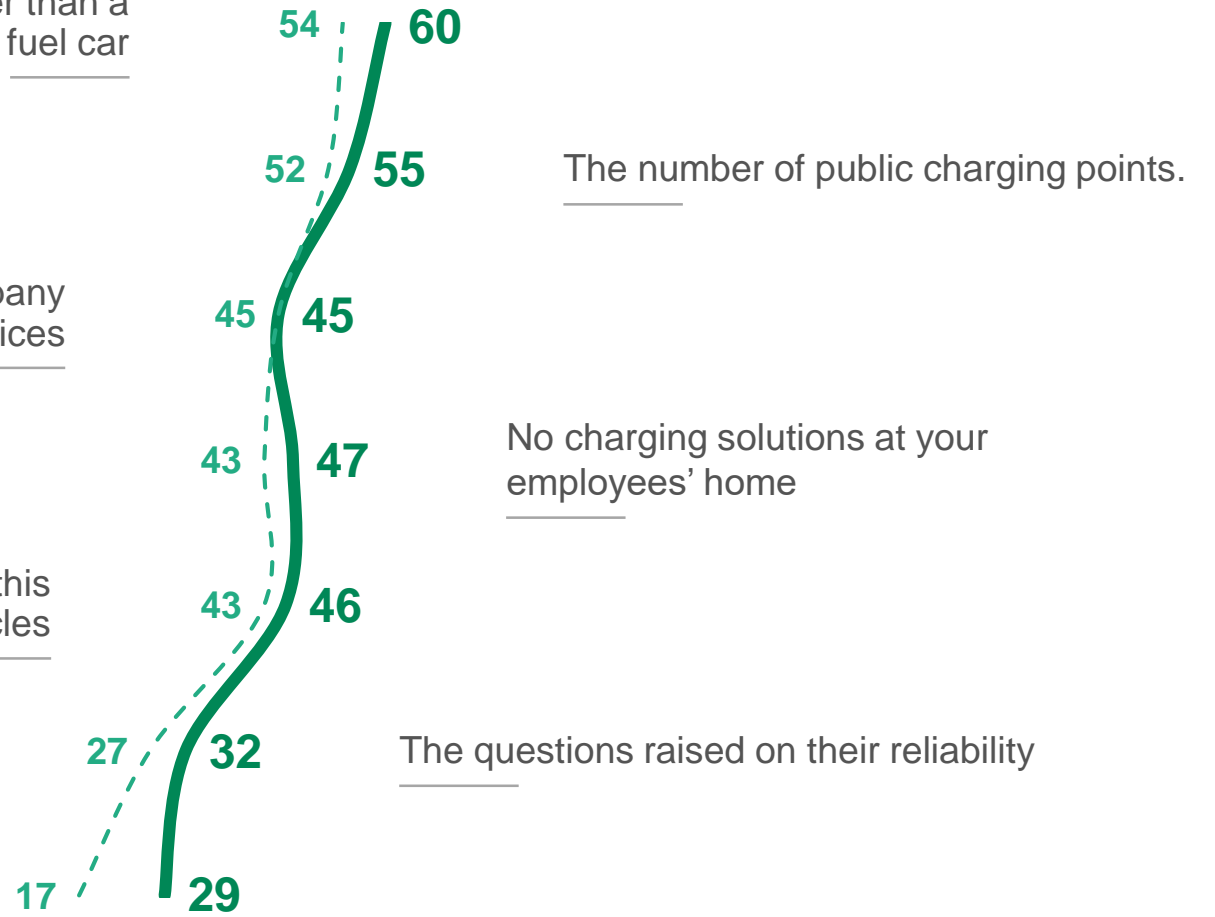
17

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 such vehicles



What are the constraints of using plug-in hybrid vehicles?
Basis: companies not considering plug-in hybrid vehicles

100% BATTERY ELECTRIC IMPLEMENTATION

In %



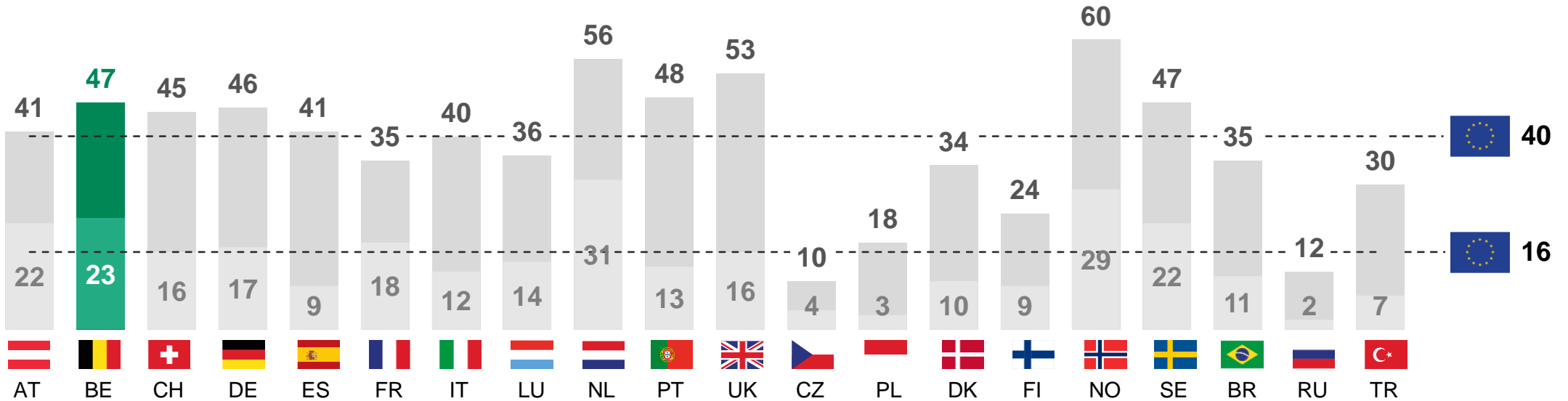
Passenger cars + LCVs



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS

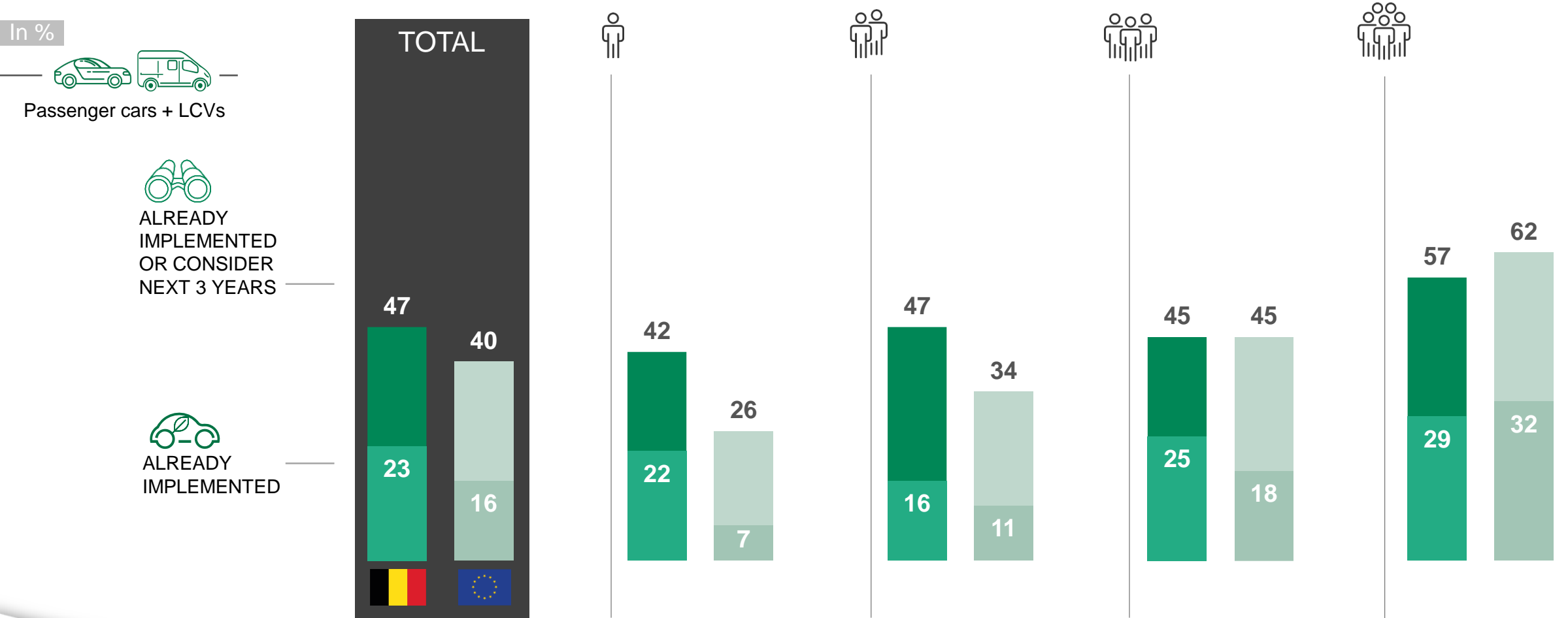


ALREADY IMPLEMENTED



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

100% BATTERY ELECTRIC IMPLEMENTATION



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

CONSTRAINTS OF 100% BATTERY ELECTRIC IMPLEMENTATION

In %



Passenger cars + LCVs

do not consider implementing battery electric vehicles

20

The number of public charging points.



58 58

57 62

47 48

46 48

47 47

30 32

20 29

The purchase price is higher than a regular fuel car

No charging points at your company offices

The questions raised on their reliability

No charging solutions at your employees' home

The range of models is limited for this type of vehicles

Your employee's reluctance to drive such vehicles

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

CNG IMPLEMENTATION

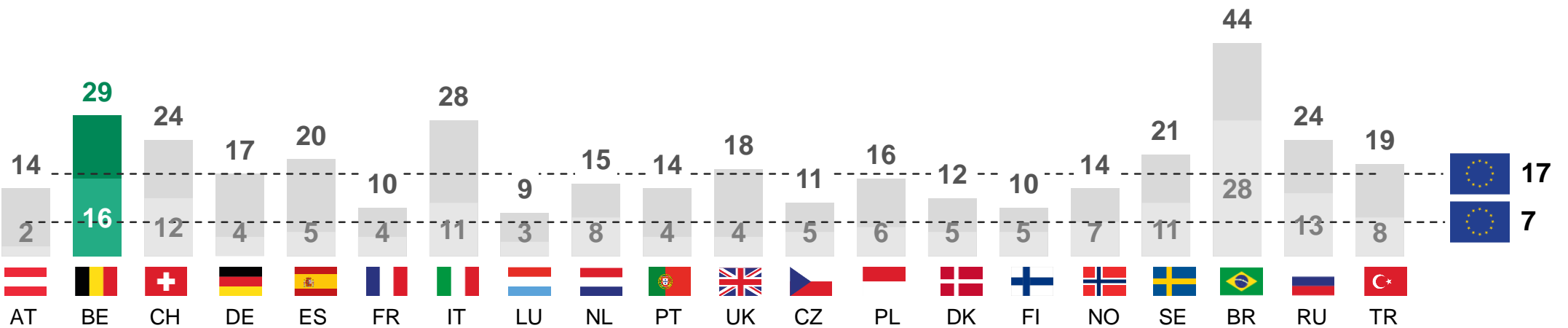
In %



Passenger cars + LCVs

ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS

ALREADY IMPLEMENTED



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

CNG IMPLEMENTATION

In %



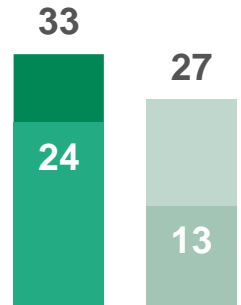
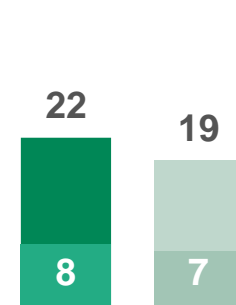
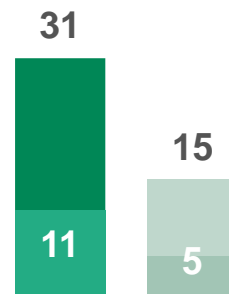
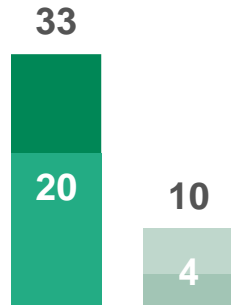
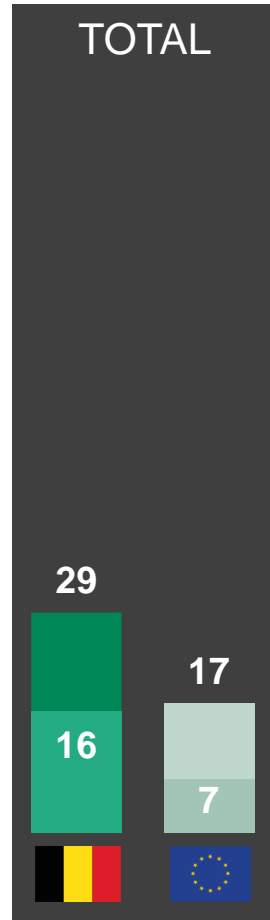
Passenger cars + LCVs



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY IMPLEMENTED



Amongst the following alternative fuel technologies, which ones do you use or are you considering using...?
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 Basis: companies with corporate vehicles = 100%

LPG IMPLEMENTATION

In %



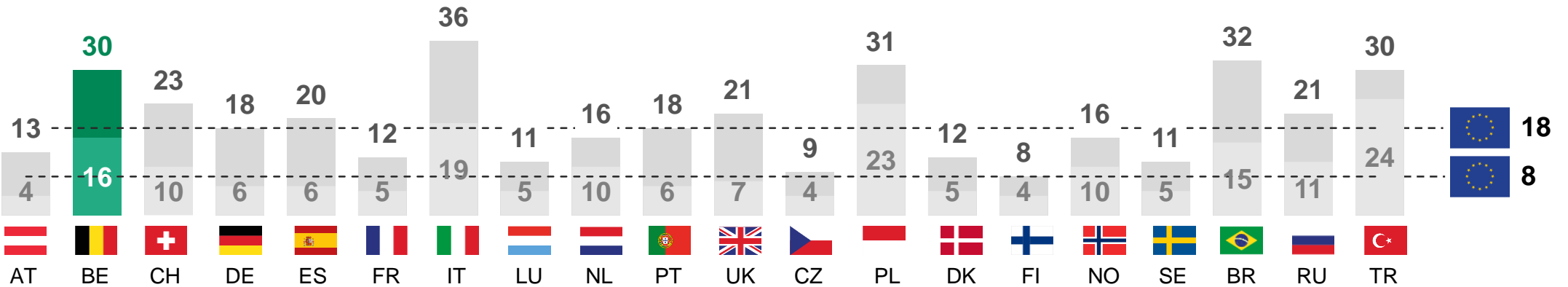
Passenger cars + LCVs



ALREADY
IMPLEMENTED
OR CONSIDER
NEXT 3 YEARS

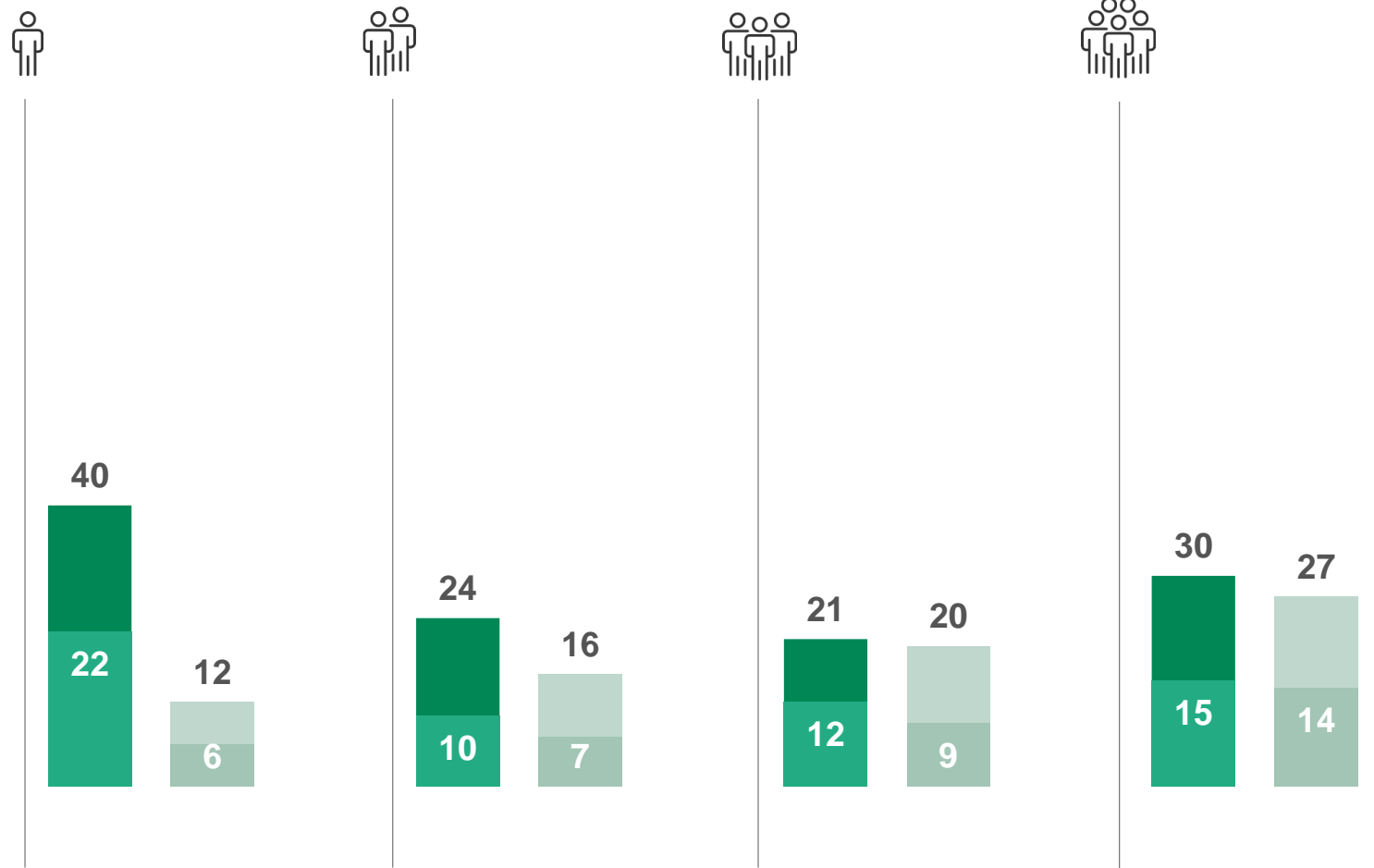
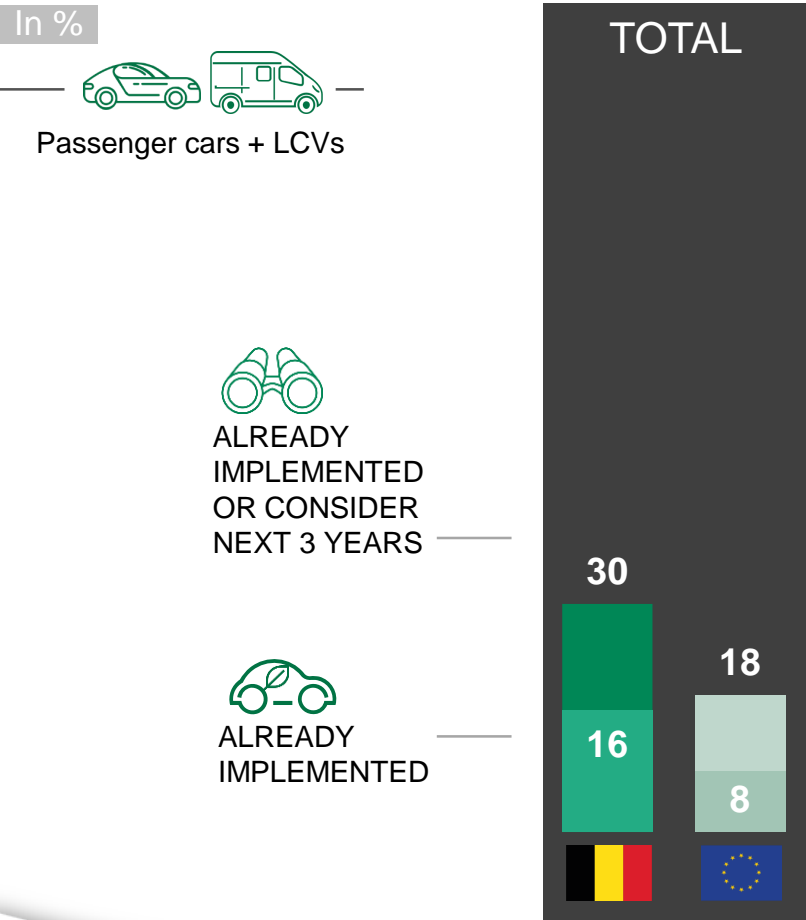


ALREADY
IMPLEMENTED



Amongst the following alternative fuel technologies, which ones do you use or are you considering using...?
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 Basis: companies with corporate vehicles = 100%

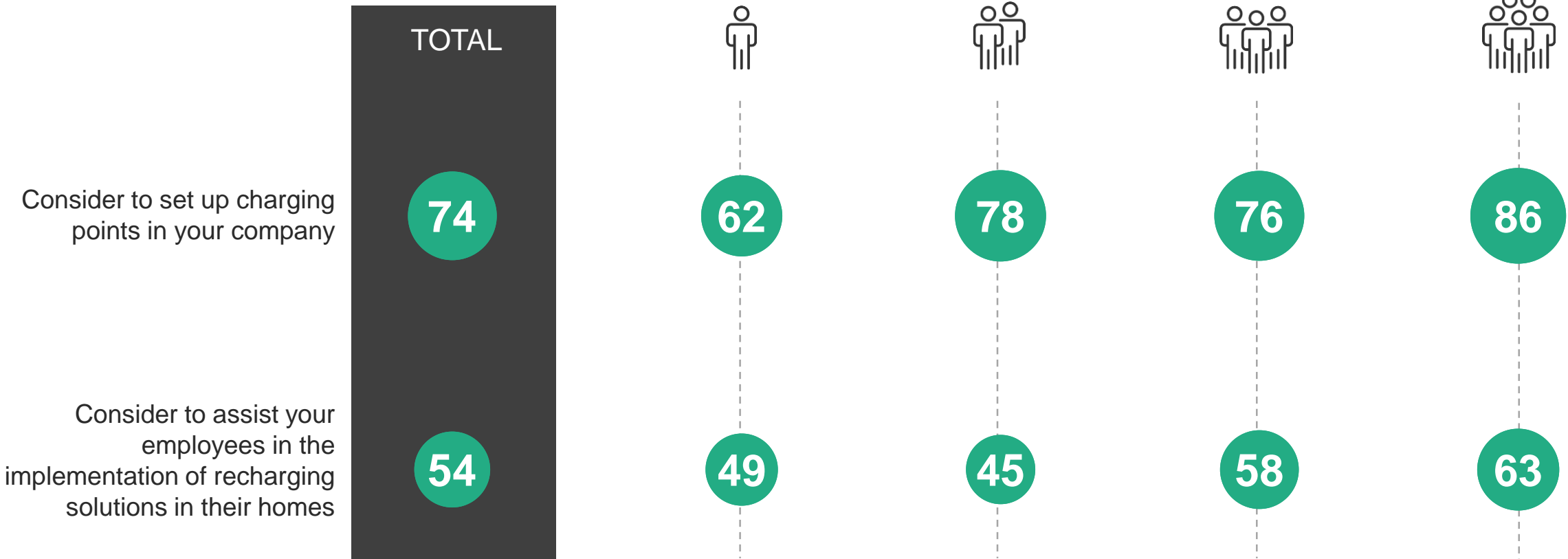
LPG IMPLEMENTATION



Amongst the following alternative fuel technologies, which ones do you use or are you considering using...?
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 Basis: companies with corporate vehicles = 100%

CONSIDERATION REGARDING CHARGING POINTS

In %



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



5

WHAT ARE THE PERSPECTIVES IN TERMS
OF ALTERNATIVE MOBILITY SOLUTIONS ?

INSIGHT#3: MOBILITY ALTERNATIVES ARE CHALLENGING
THE CORPORATE CAR FLEET

INSIGHT 3: MOBILITY ALTERNATIVES ARE CHALLENGING THE CORPORATE CAR FLEET

1

- Belgium is one of the most advanced European markets in the adoption of most of the alternative mobility solutions (corporate car sharing, bike sharing, public transport, mobility budget) among companies of all sizes. Overall, 69% of the Belgium companies already allow such a mobility alternative (vs 61% Europe).

2

- Public transport is the first alternative used to date (41%) and is also expected to maintain its leading position in the near future (59%). Public transport is followed by ride sharing (28%), which will strengthen its position (51%), along side with mobility budget (51%, +26 pts in the next 3 years). Nonetheless, other alternatives will also continue to increase and maintain or even strengthen their gap compared to other European countries.

3

- The shift from corporate cars toward new mobility solution is clearly engaged : public transport, car sharing or mobility budget.

4

- Overall, Belgian companies are quite willing to develop a mobility plan, whatever the company size. We expect that 50% of them will be offering a mobility plan, either for the ones who have a company car or for all their employees. 57% are also ready to introduce or to increase home working (69% among the largest companies).

MOBILITY ALTERNATIVES LIST AND DEFINITIONS



CORPORATE CAR SHARING:

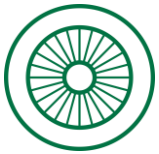
the company makes available upon reservation vehicles for its employees via an external solution



RIDE SHARING BETWEEN EMPLOYEES: several employees in the same car for a journey to the same destination (ComOn, Blablacar, Commuty)



BIKE SHARING



OTHER 2 WHEELS SOLUTIONS (motorbike, motorized scooters,...) or micro-mobility (kick scooter)



PUBLIC TRANSPORT



MOBILITY BUDGET within a predefined budget usually granted by the employer allowing employees to choose any mobility mode that is available on the market



MOBILITY CARD PROVIDED BY THE EMPLOYER: employees can use it to book, pay, use any mobility mode available on their country (Xximo card...)



AN APP TO BOOK MOBILITY SOLUTIONS (travel planning, payments for your transport...)



PRIVATE LEASE OR SALARY SACRIFICE (by private lease we mean the fact that an employee rents or lease a car on his own behalf. By salary sacrifice I mean the fact that an employee rents or lease a car via his employer)



PROVIDE MID-TERM RENTAL VEHICLES (a rental for between 1 to 24 months) to provide transport needs for an employee

OVERVIEW OF ALTERNATIVE MOBILITY SOLUTIONS IMPLEMENTATION

In %

47% of companies allow mobility solutions in their car policy

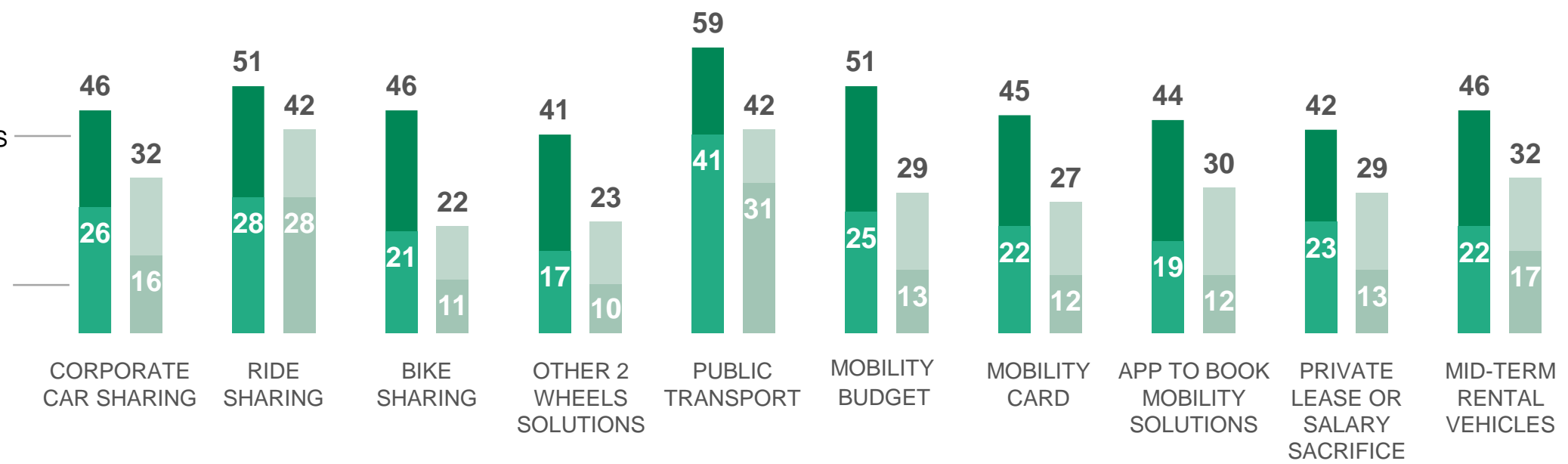
69% have already implemented at least one the solutions below:



ALREADY USED OR CONSIDERED NEXT 3 YEARS



ALREADY USING



Do you allow mobility solutions in your car policy?
 What have you already implemented and what will you implement in the next 3 years?
 Response scale: Already using, considered in the next 3 years, not interested
 Basis: companies with corporate vehicles = 100%

OVERVIEW OF ALTERNATIVE MOBILITY SOLUTIONS IMPLEMENTATION

Focus on 1 to 99

In %


42% of companies allow mobility solutions in their car policy

63% have already implemented at least one the solutions below:





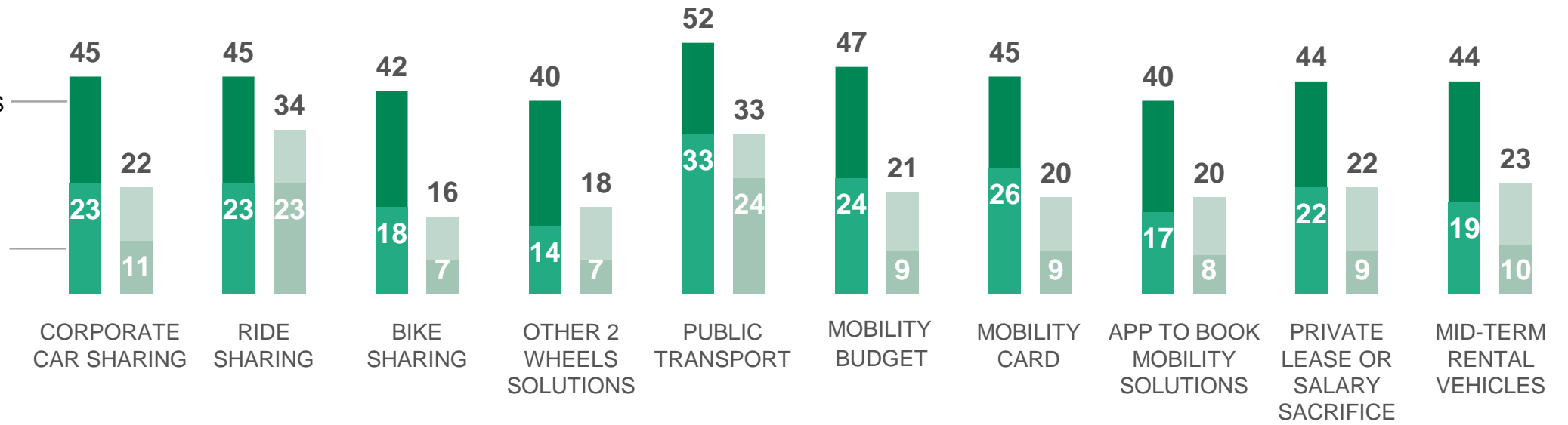
 ALREADY USED OR CONSIDERED NEXT 3 YEARS



 +



 ALREADY USING



Do you allow mobility solutions in your car policy?
 What have you already implemented and what will you implement in the next 3 years?
 Response scale: Already using, considered in the next 3 years, not interested
 Basis: companies with corporate vehicles = 100%

OVERVIEW OF ALTERNATIVE MOBILITY SOLUTIONS IMPLEMENTATION

Focus on 100 and more

In %

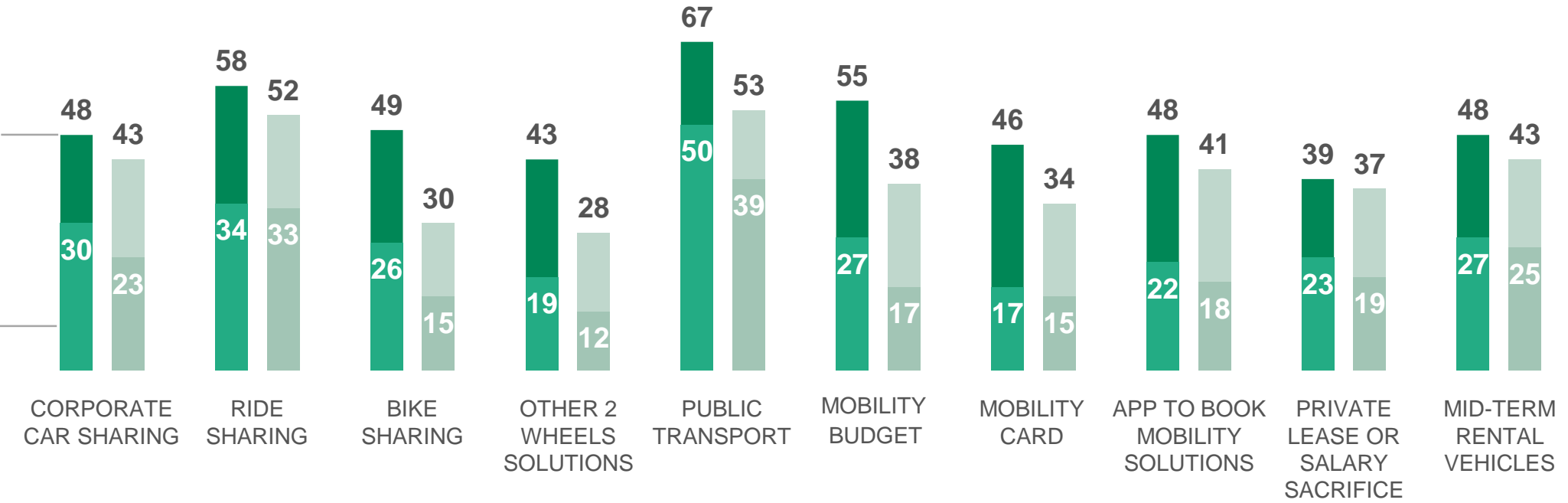
53% of companies allow mobility solutions in their car policy

77% have already implemented at least one the solutions below:



ALREADY USED OR CONSIDERED NEXT 3 YEARS

+ ALREADY USING



Do you allow mobility solutions in your car policy?
 What have you already implemented and what will you implement in the next 3 years?
 Response scale: Already using, considered in the next 3 years, not interested
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CORPORATE CAR SHARING IMPLEMENTATION

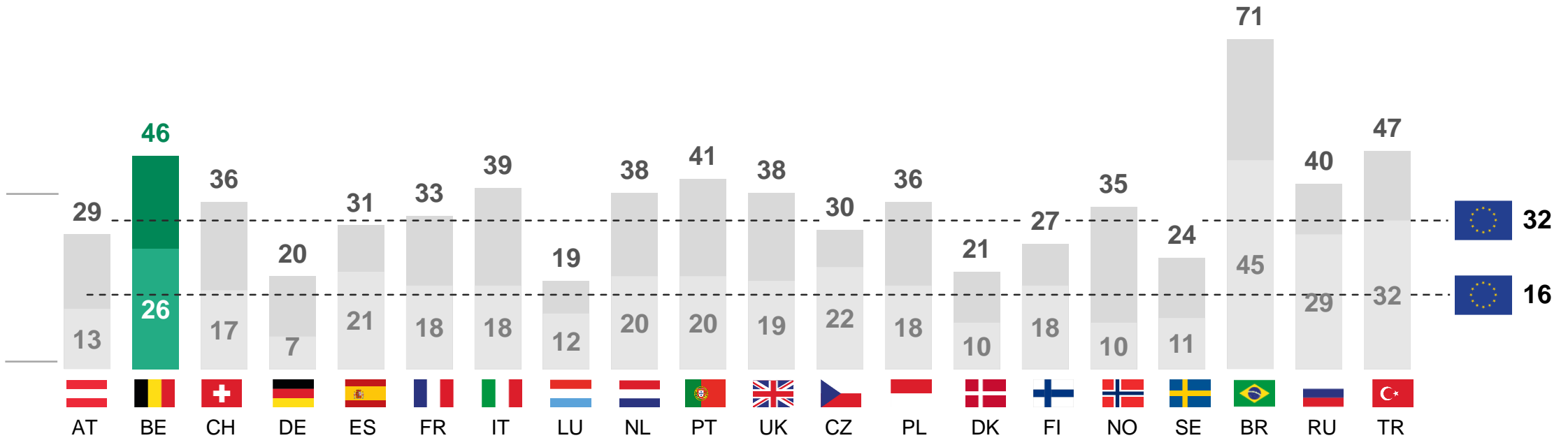
In %



ALREADY USED OR CONSIDERED NEXT 3 YEARS



ALREADY USING



What have you already implemented and what will you implement in the next 3 years?
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CORPORATE CAR SHARING IMPLEMENTATION

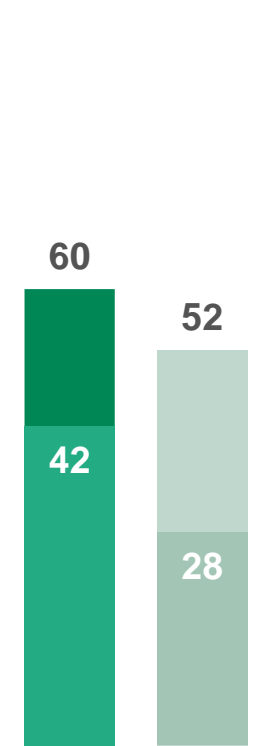
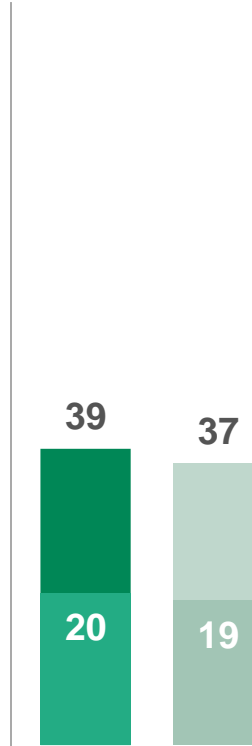
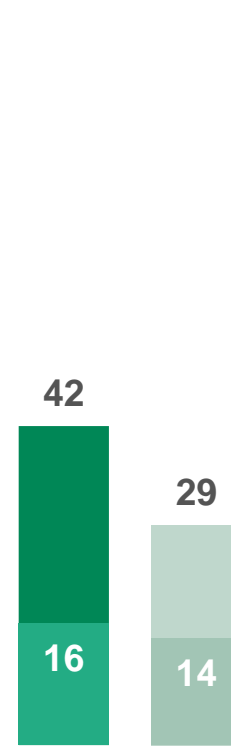
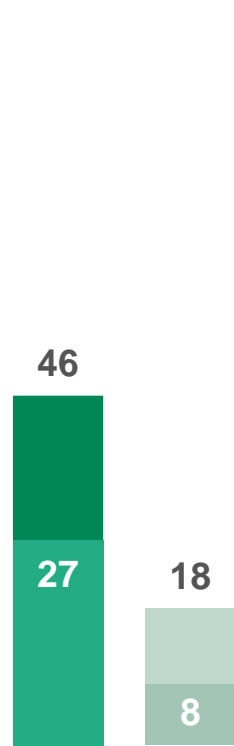
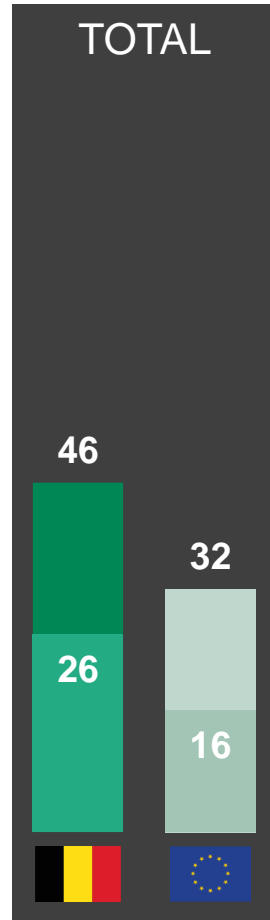
In %



ALREADY IMPLEMENTED OR USING NEXT 3 YEARS



ALREADY USING



What have you already implemented and what will you implement in the next 3 years?
 Response scale: Already using, considered in the next 3 years, not interested
 Basis: companies with corporate vehicles = 100%

RIDE SHARING BETWEEN EMPLOYEES IMPLEMENTATION

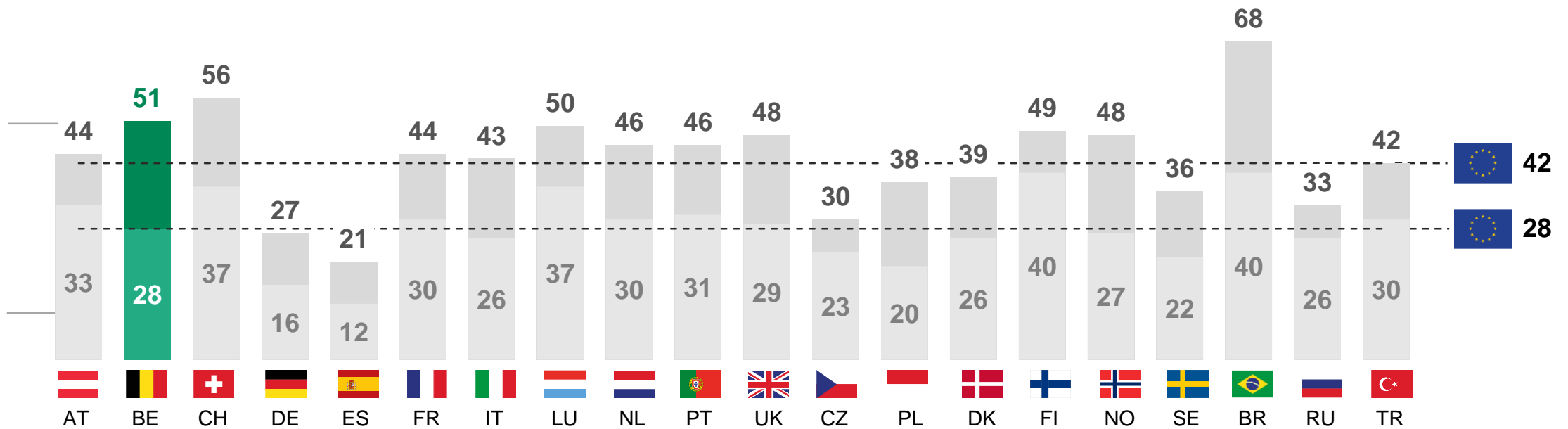
In %



ALREADY USED OR CONSIDERED NEXT 3 YEARS



ALREADY USING



What have you already implemented and what will you implement in the next 3 years?
 Response scale: Already using, considered in the next 3 years, not interested
 Basis: companies with corporate vehicles = 100%

RIDE SHARING BETWEEN EMPLOYEES IMPLEMENTATION

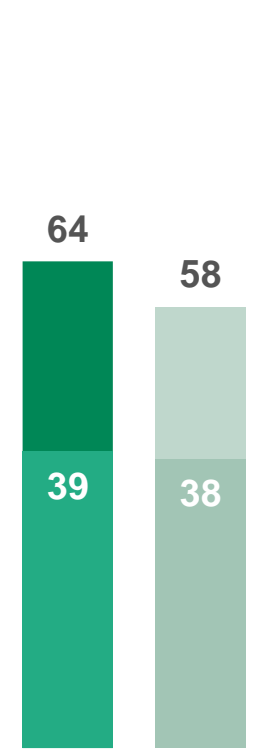
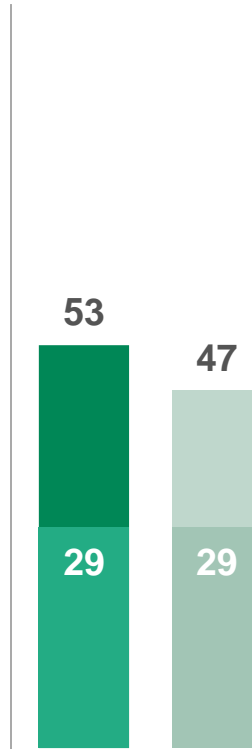
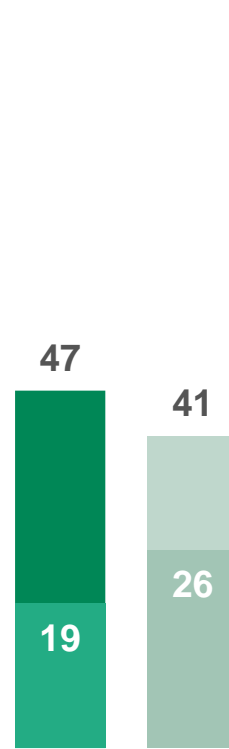
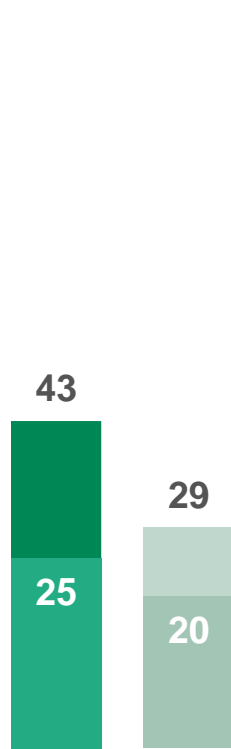
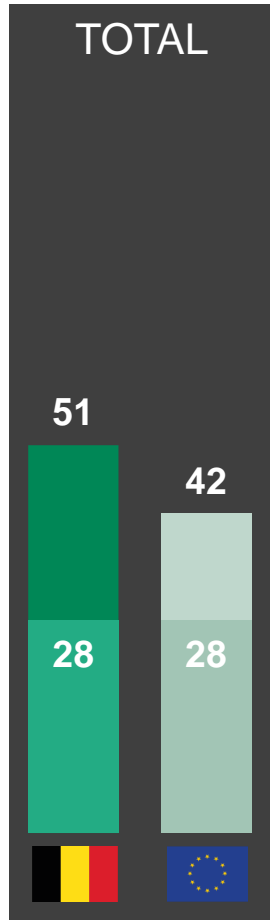
In %



ALREADY IMPLEMENTED OR USING NEXT 3 YEARS



ALREADY USING



What have you already implemented and what will you implement in the next 3 years?
 Response scale: Already using, considered in the next 3 years, not interested
 Basis: companies with corporate vehicles = 100%

BIKE SHARING IMPLEMENTATION

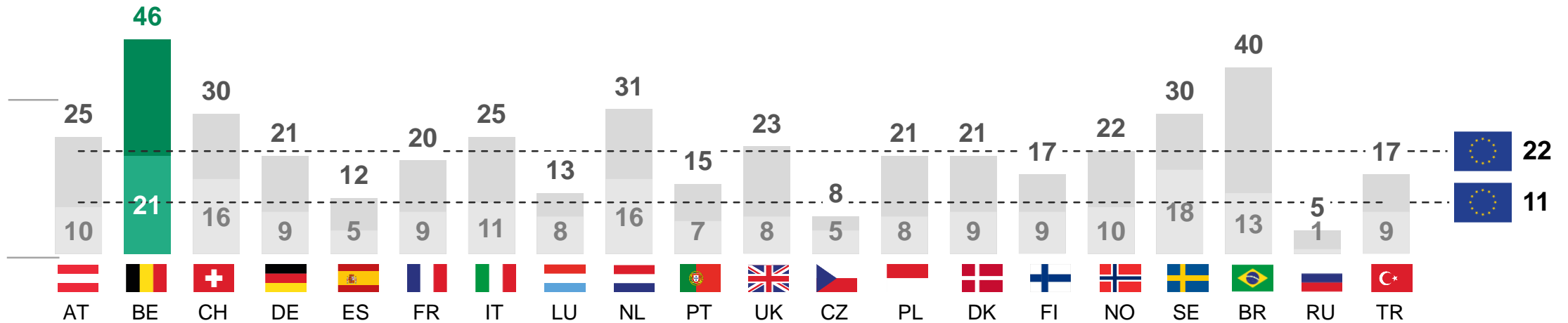
In %



ALREADY
USED OR
CONSIDERED
NEXT 3 YEARS



ALREADY
USING



What have you already implemented and what will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%

BIKE SHARING IMPLEMENTATION

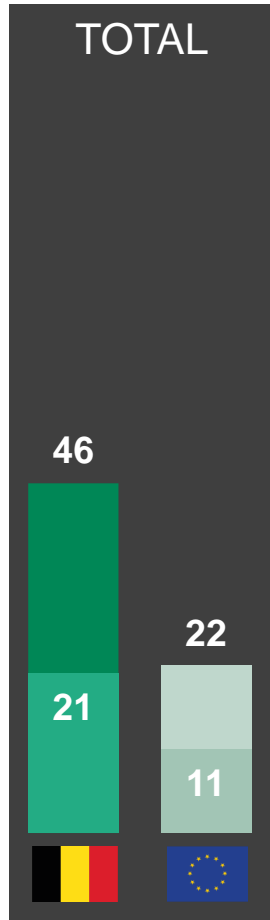
In %



ALREADY
IMPLEMENTED
OR USING NEXT 3
YEARS



ALREADY
USING



41

15

14

6



44

22

19

9



44

20

25

12



57

34

35

18

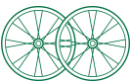
What have you already implemented and what will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%

OTHER 2 WHEELS SOLUTIONS OR MICRO-MOBILITY IMPLEMENTATION

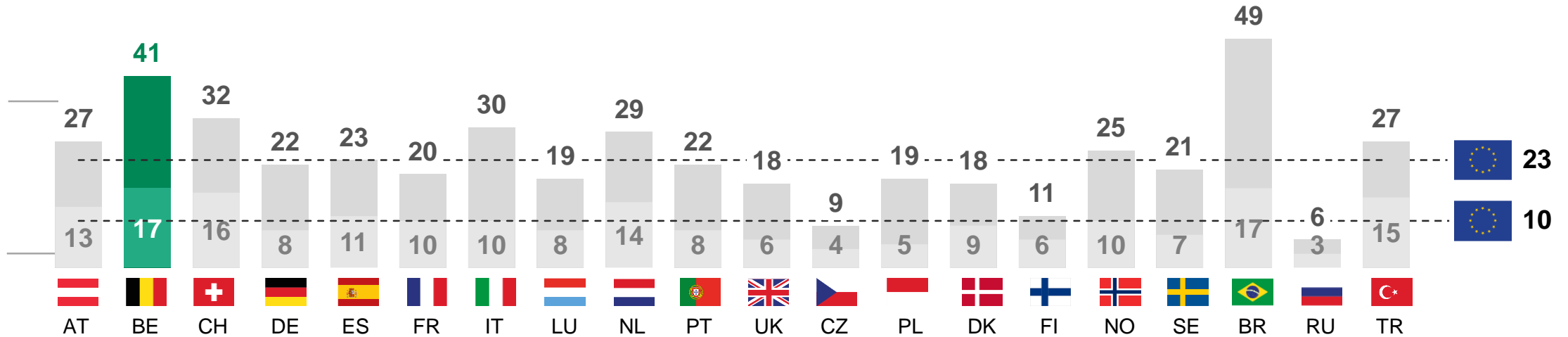
In %



ALREADY USED OR CONSIDERED NEXT 3 YEARS



ALREADY USING



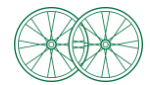
What have you already implemented and what will you implement in the next 3 years?
 Response scale: Already using, considered in the next 3 years, not interested
 Basis: companies with corporate vehicles = 100%

OTHER 2 WHEELS SOLUTIONS OR MICRO-MOBILITY IMPLEMENTATION

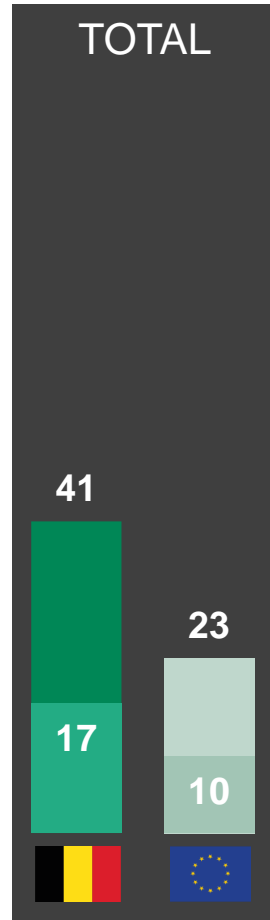
In %



ALREADY IMPLEMENTED OR USING NEXT 3 YEARS



ALREADY USING



38

15

17

7



42

12

20

8



39

12

23

10



48

29

33

15

What have you already implemented and what will you implement in the next 3 years?
 Response scale: Already using, considered in the next 3 years, not interested
 Basis: companies with corporate vehicles = 100%

PUBLIC TRANSPORT IMPLEMENTATION

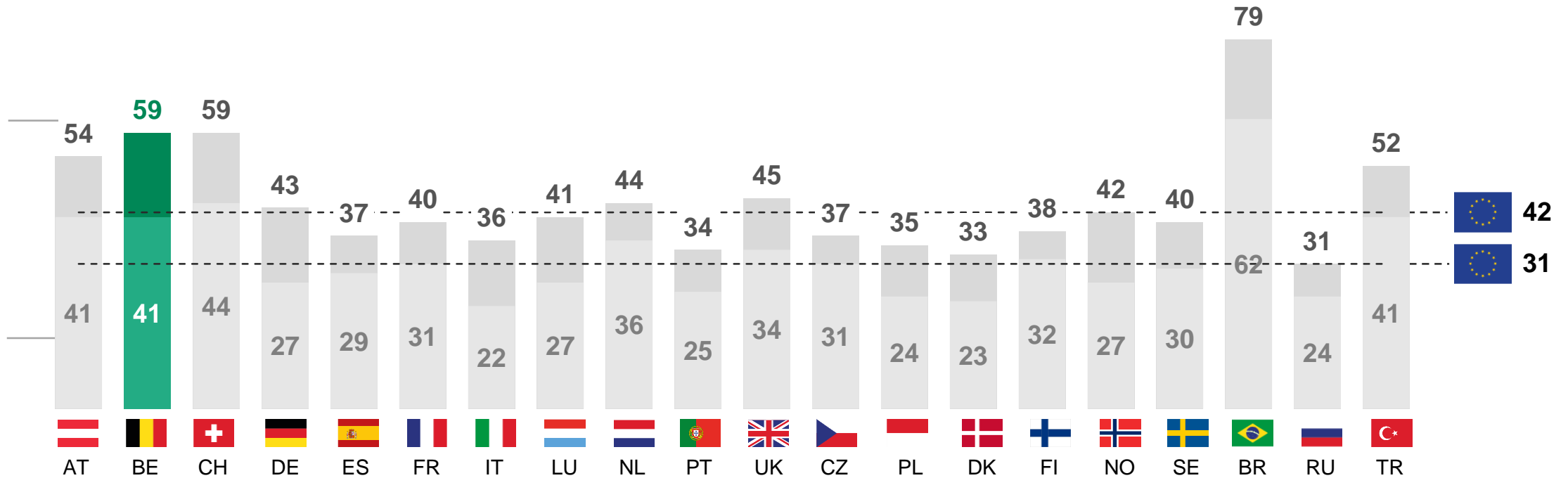
In %



ALREADY USED OR CONSIDERED NEXT 3 YEARS



ALREADY USING



What have you already implemented and what will you implement in the next 3 years?
 Response scale: Already using, considered in the next 3 years, not interested
 Basis: companies with corporate vehicles = 100%

PUBLIC TRANSPORT IMPLEMENTATION

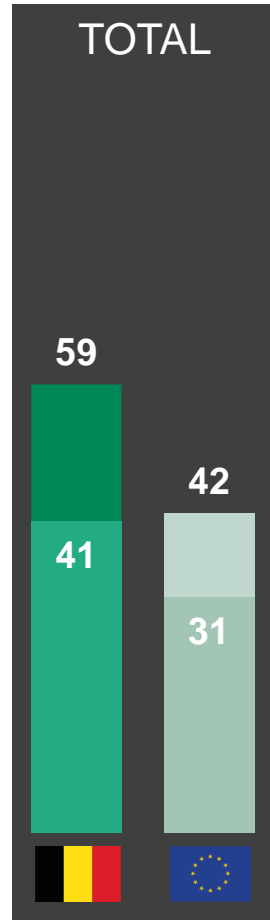
In %



ALREADY IMPLEMENTED OR USING NEXT 3 YEARS



ALREADY USING



49

34

30

22



57

31

38

27



53

39

47

35



86

65

61

44

What have you already implemented and what will you implement in the next 3 years?
 Response scale: Already using, considered in the next 3 years, not interested
 Basis: companies with corporate vehicles = 100%

MOBILITY BUDGET IMPLEMENTATION

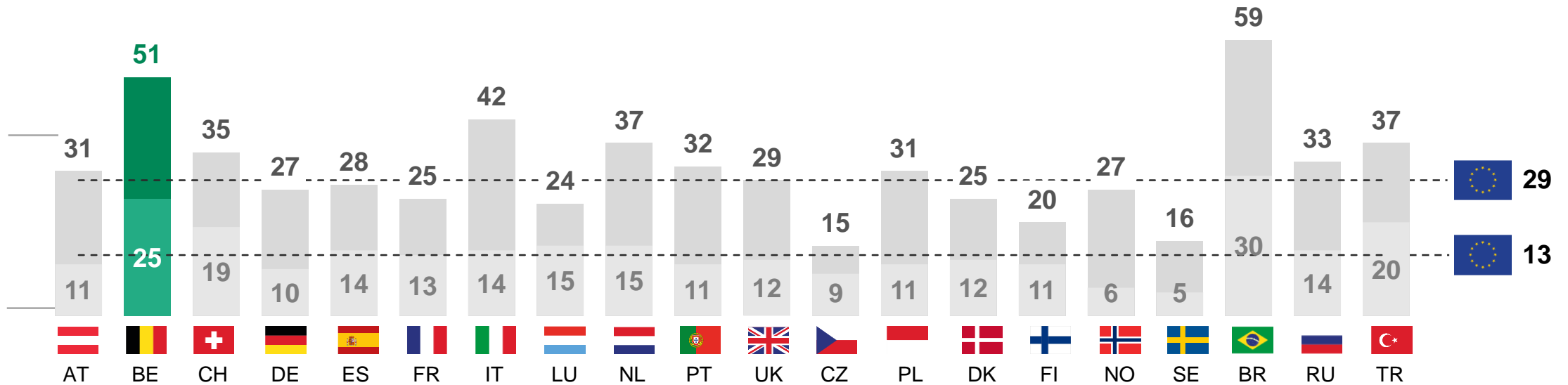
In %



ALREADY USED OR CONSIDERED NEXT 3 YEARS



ALREADY USING



What have you already implemented and what will you implement in the next 3 years?
 Response scale: Already using, considered in the next 3 years, not interested
 Basis: companies with corporate vehicles = 100%

MOBILITY BUDGET IMPLEMENTATION

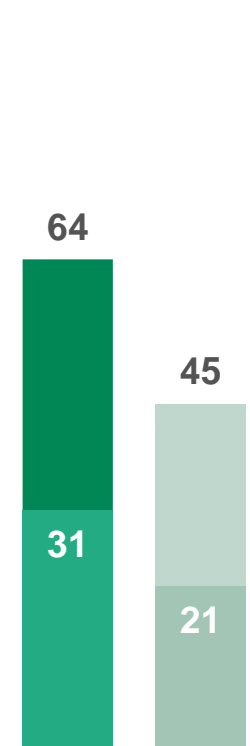
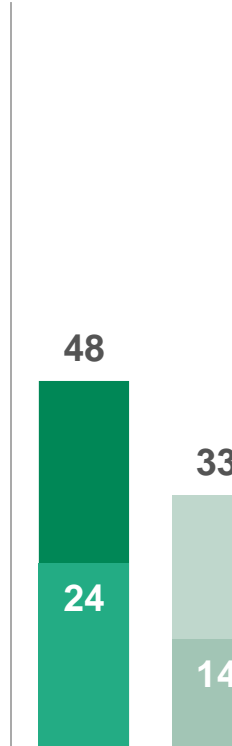
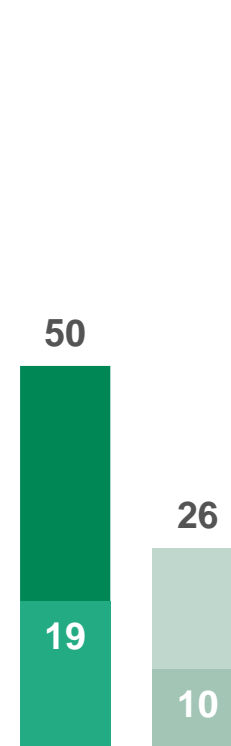
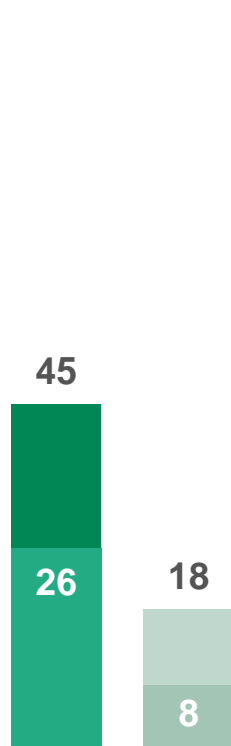
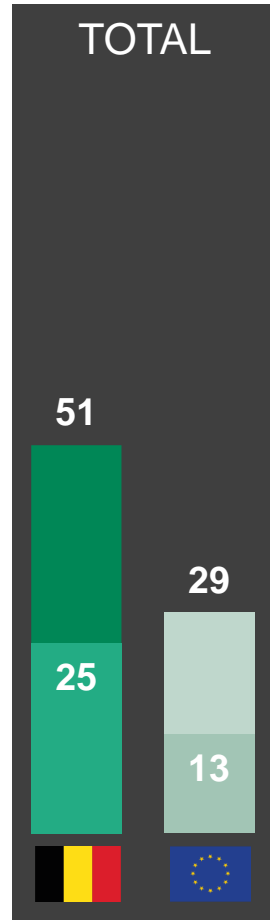
In %



ALREADY IMPLEMENTED OR USING NEXT 3 YEARS



ALREADY USING



What have you already implemented and what will you implement in the next 3 years?
 Response scale: Already using, considered in the next 3 years, not interested
 Basis: companies with corporate vehicles = 100%

MOBILITY CARD PROVIDED BY THE EMPLOYER IMPLEMENTATION

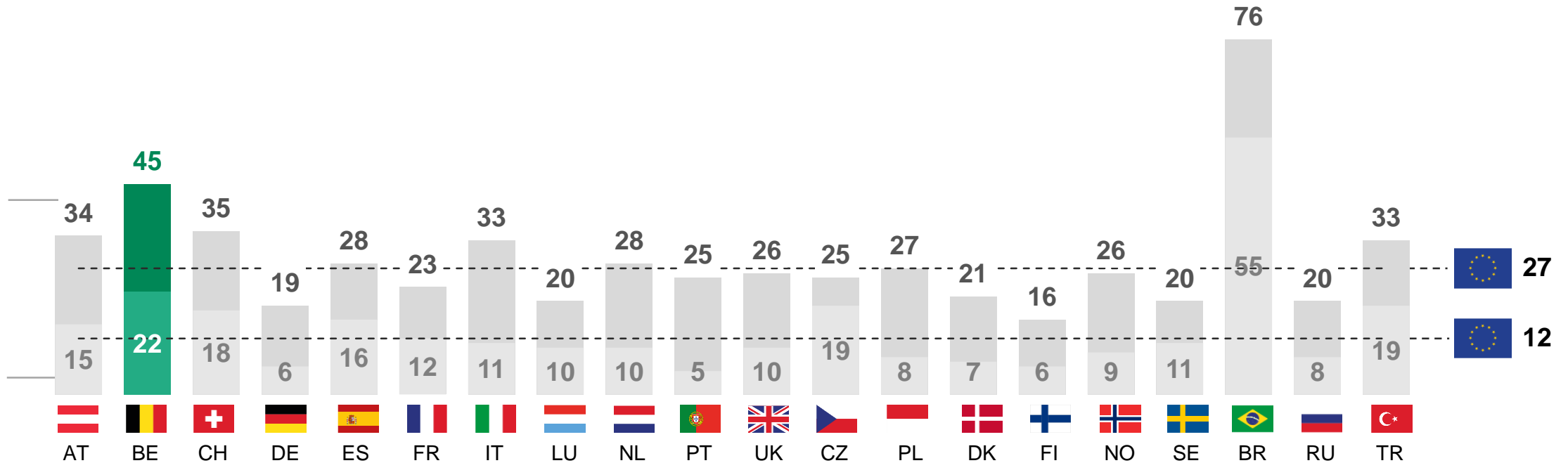
In %



ALREADY USED OR CONSIDERED NEXT 3 YEARS



ALREADY USING



What have you already implemented and what will you implement in the next 3 years?
 Response scale: Already using, considered in the next 3 years, not interested
 Basis: companies with corporate vehicles = 100%

MOBILITY CARD PROVIDED BY THE EMPLOYER IMPLEMENTATION

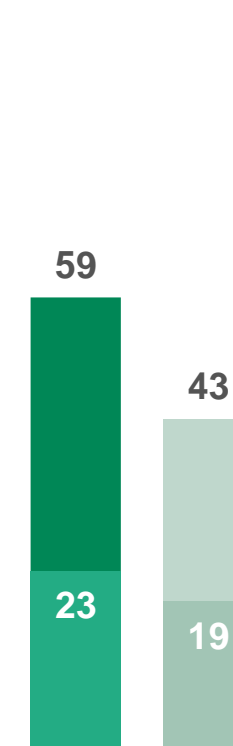
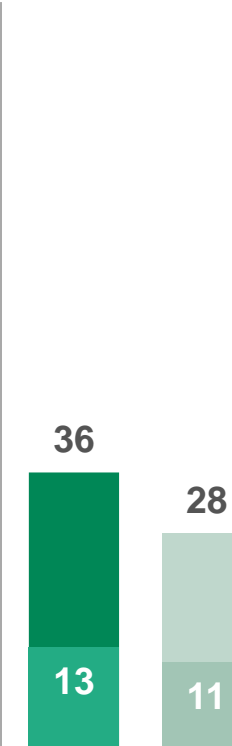
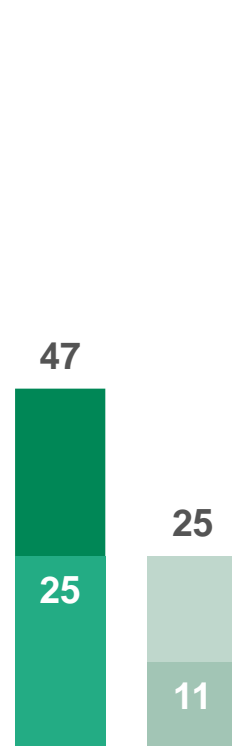
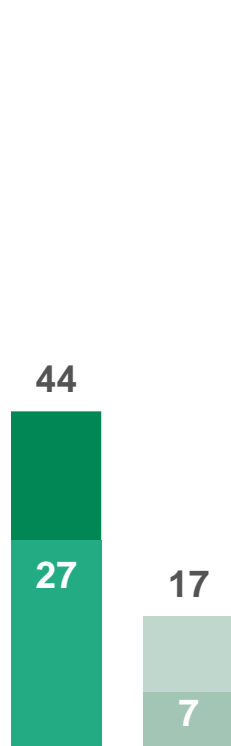
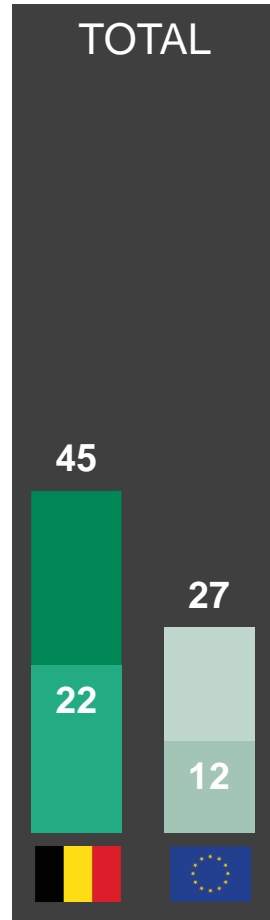
In %



ALREADY IMPLEMENTED OR USING NEXT 3 YEARS



ALREADY USING



What have you already implemented and what will you implement in the next 3 years?
 Response scale: Already using, considered in the next 3 years, not interested
 Basis: companies with corporate vehicles = 100%

AN APP TO BOOK MOBILITY SOLUTIONS IMPLEMENTATION

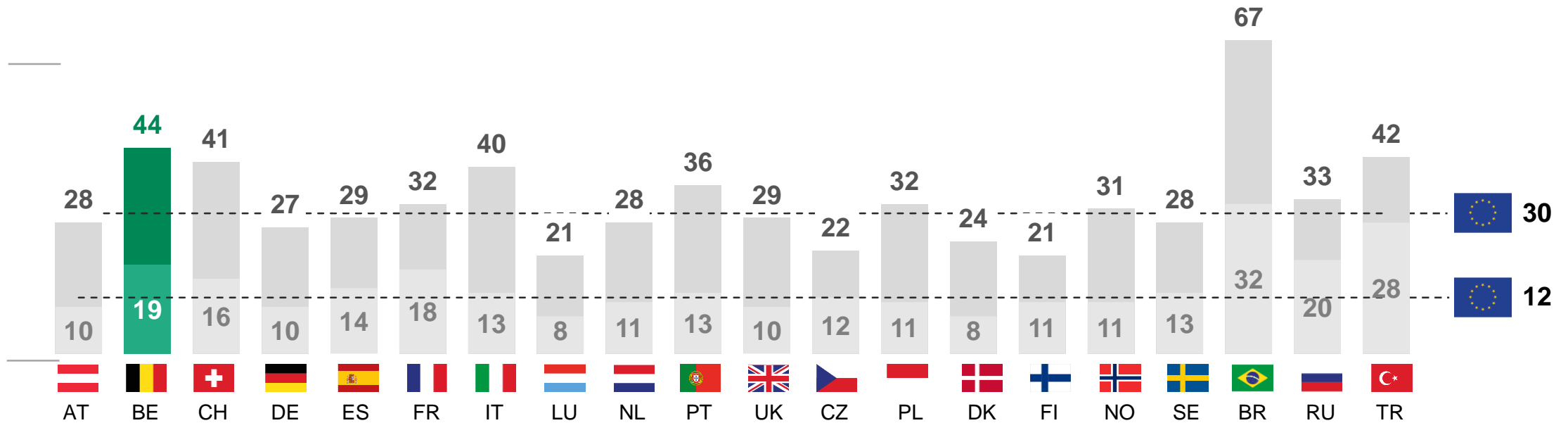
In %



ALREADY USED OR CONSIDERED NEXT 3 YEARS



ALREADY USING



What have you already implemented and what will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%

AN APP TO BOOK MOBILITY SOLUTIONS IMPLEMENTATION

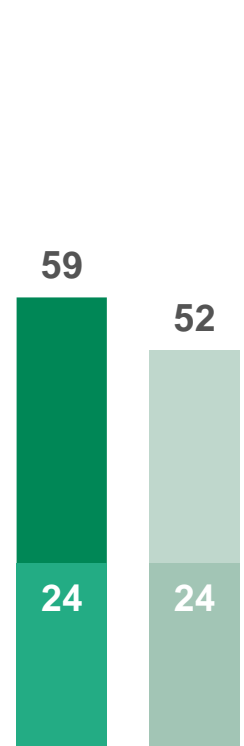
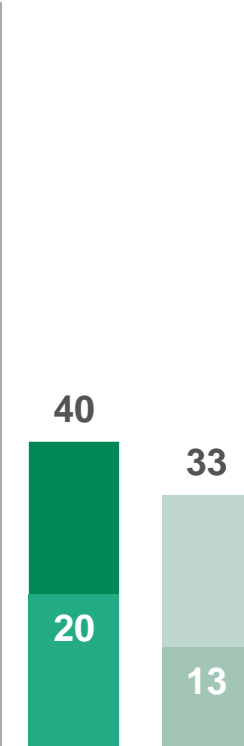
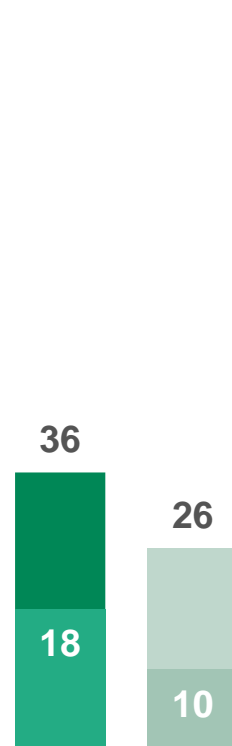
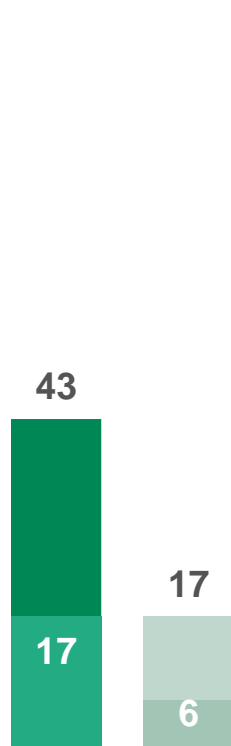
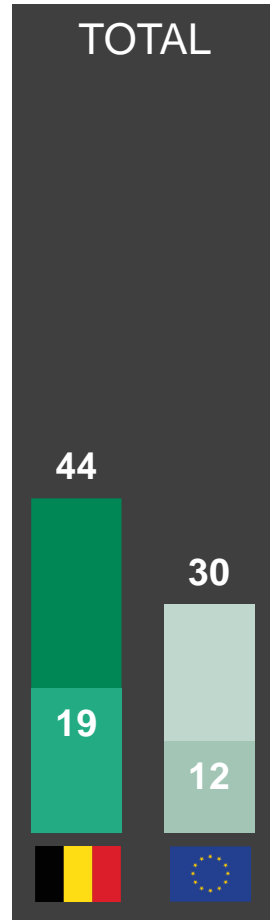
In %



ALREADY
IMPLEMENTED
OR USING NEXT 3
YEARS



ALREADY
USING



What have you already implemented and what will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%

PRIVATE LEASE OR SALARY SACRIFICE IMPLEMENTATION

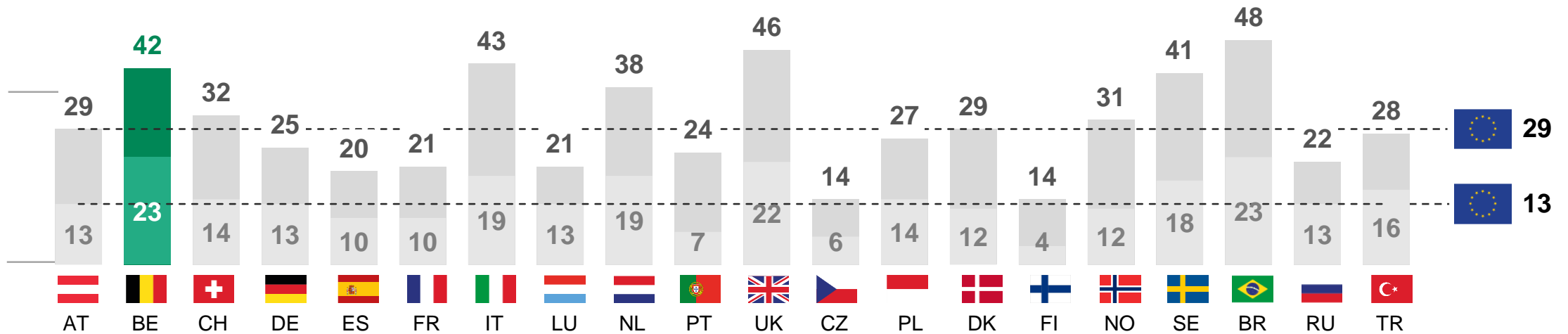
In %



ALREADY USED OR CONSIDERED NEXT 3 YEARS



ALREADY USING



What have you already implemented and what will you implement in the next 3 years?
 Response scale: Already using, considered in the next 3 years, not interested
 Basis: companies with corporate vehicles = 100%

PRIVATE LEASE OR SALARY SACRIFICE IMPLEMENTATION

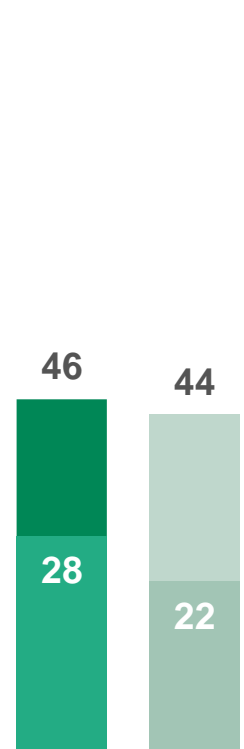
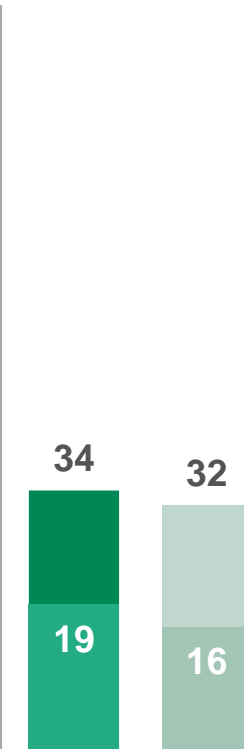
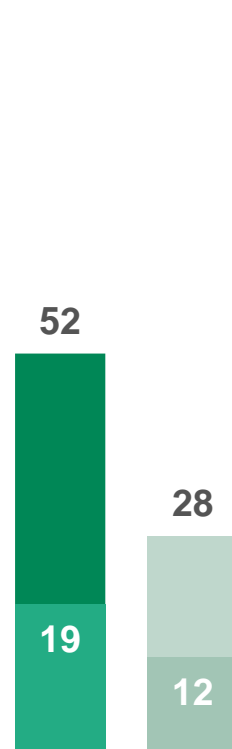
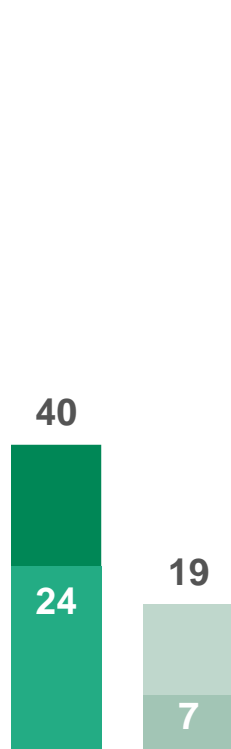
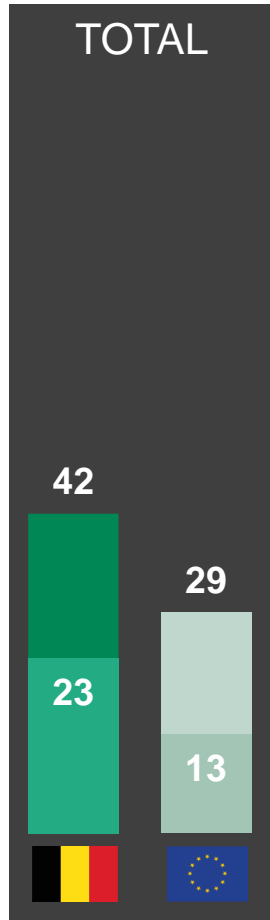
In %



ALREADY IMPLEMENTED OR USING NEXT 3 YEARS



ALREADY USING



What have you already implemented and what 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%

MID-TERM RENTAL VEHICLES IMPLEMENTATION

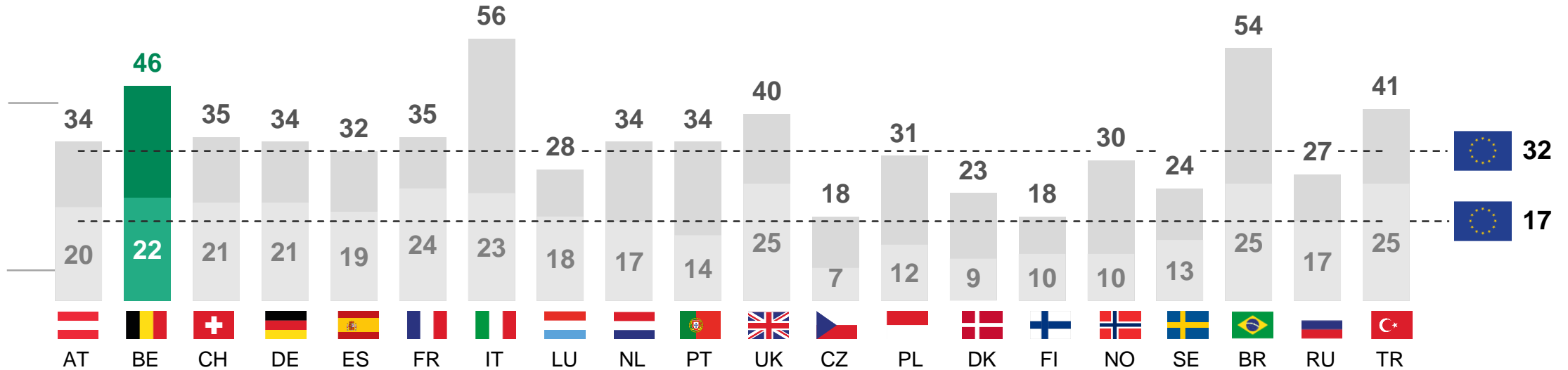
In %



ALREADY USED OR CONSIDERED NEXT 3 YEARS



ALREADY USING



What have you already implemented and what 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%

MID-TERM RENTAL VEHICLES IMPLEMENTATION

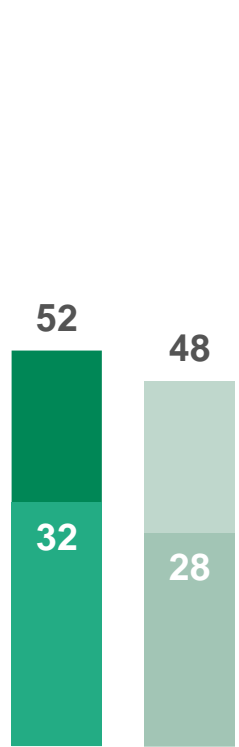
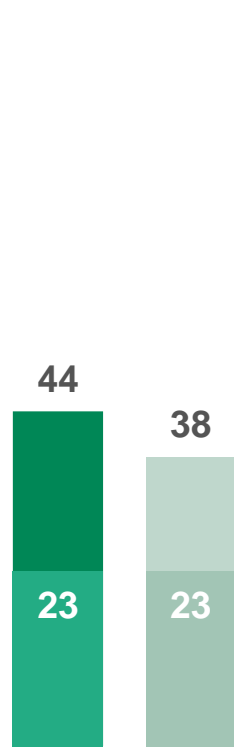
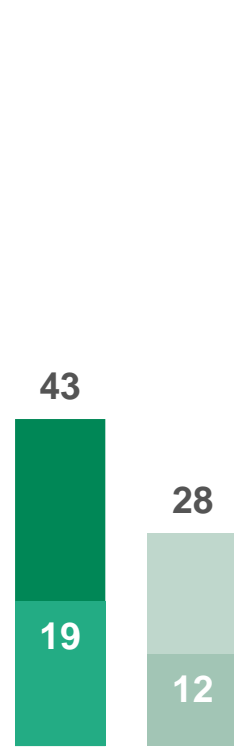
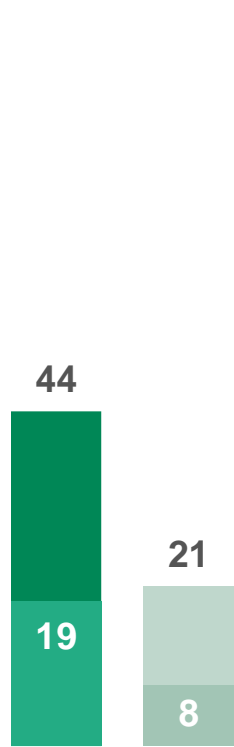
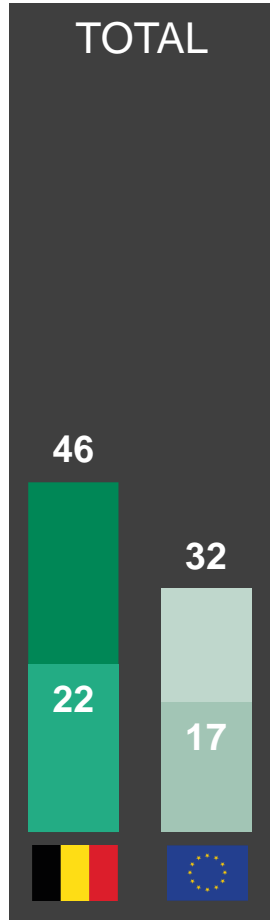
In %



ALREADY IMPLEMENTED OR USING NEXT 3 YEARS



ALREADY USING

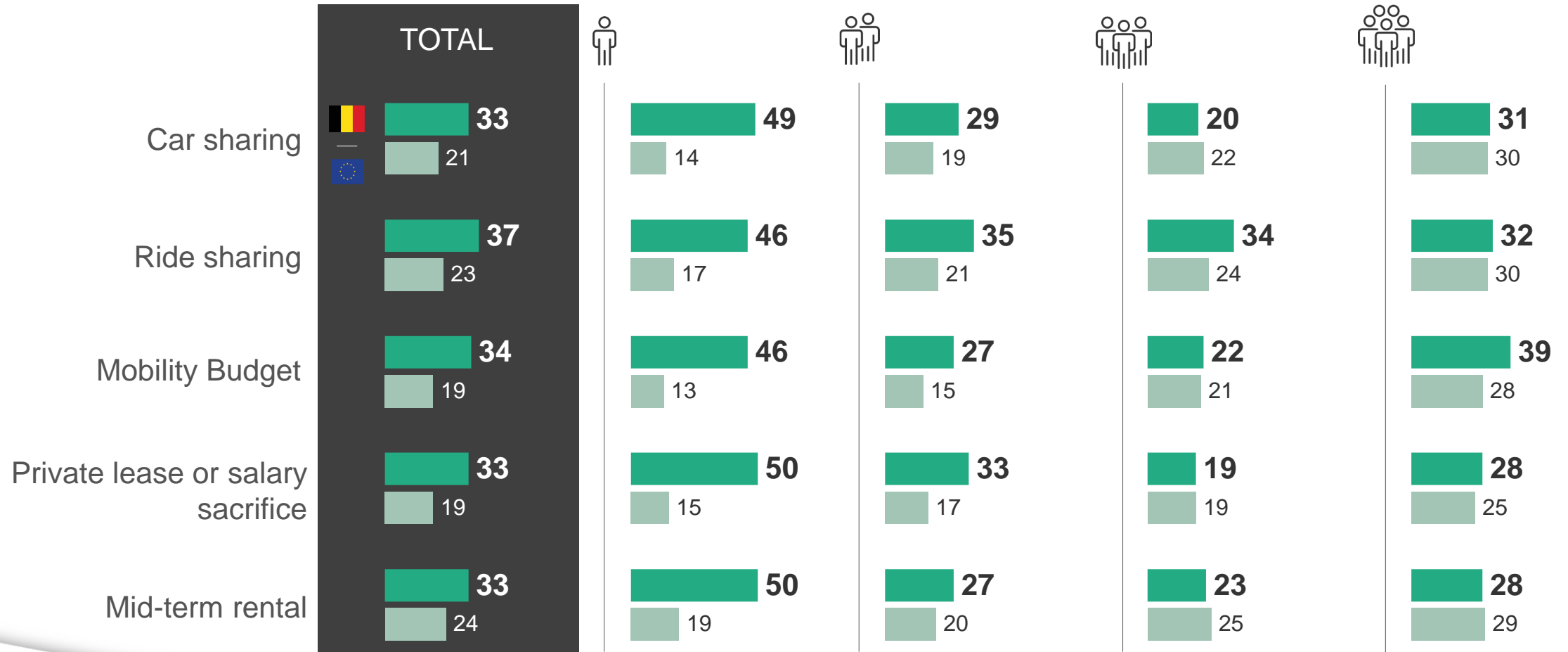


What have you already implemented and what will you implement in the next 3 years?
 Response scale: Already using, considered in the next 3 years, not interested
 Basis: companies with corporate vehicles = 100%

LIKELYHOOD TO GIVE UP PART / ALL FLEET FOR MOBILITY ALTERNATIVES

TOTAL Certainly or probably

In %

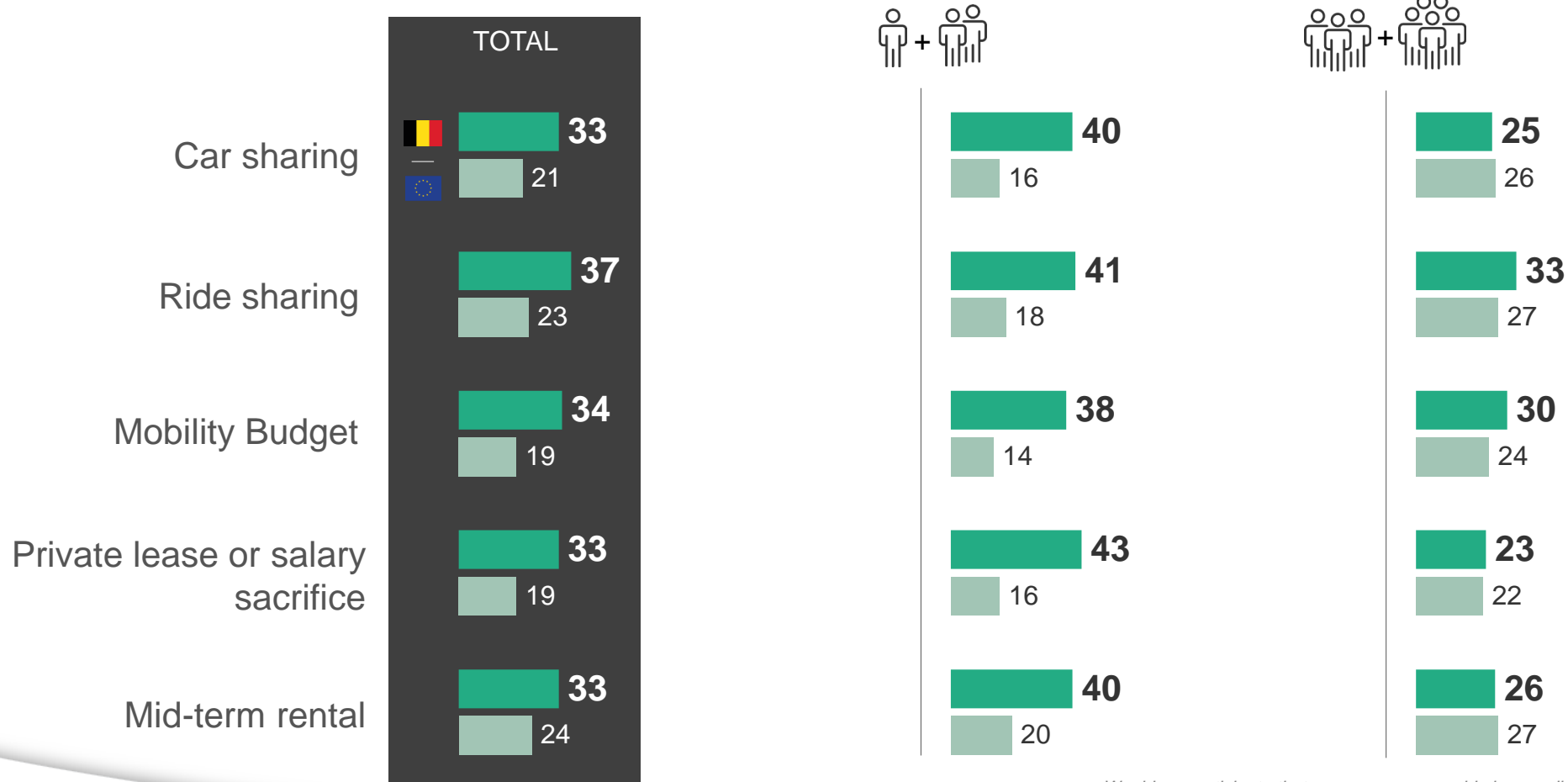


Would you anticipate that your company would give up all or part of the company car fleet for such alternatives?
 . Basis: companies using or considering the mentioned mobility solution

LIKELYHOOD TO GIVE UP PART / ALL FLEET FOR MOBILITY ALTERNATIVES

TOTAL Certainly or probably



In %

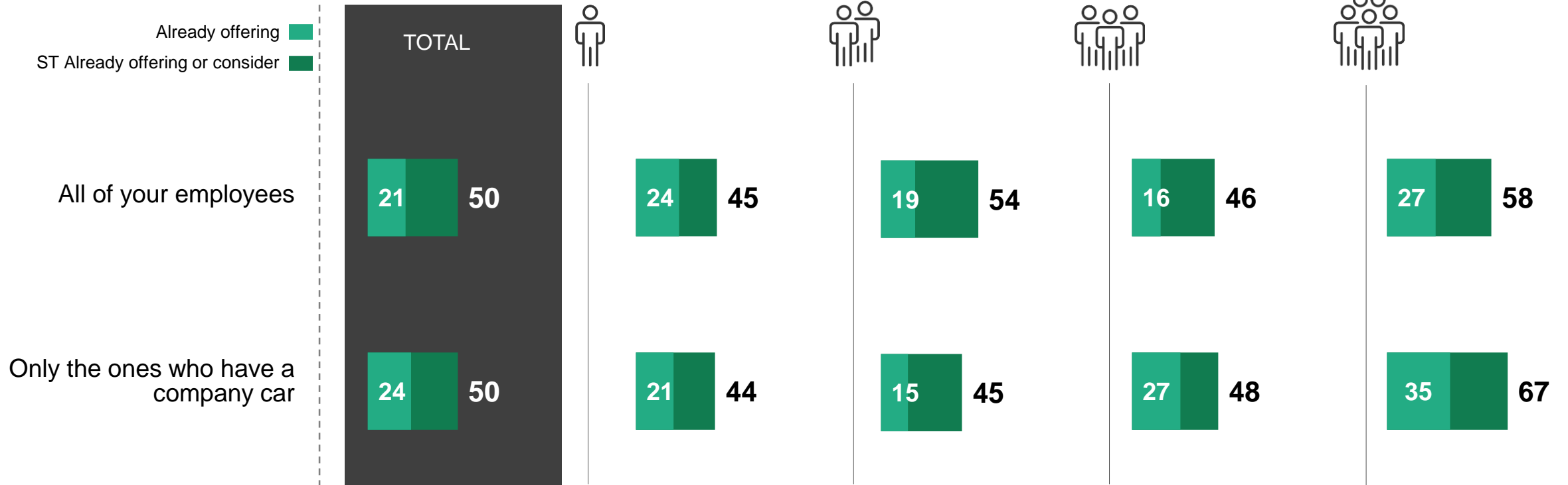


Would you anticipate that your company would give up all or part of the company car fleet for such alternatives?
 . Basis: companies using or considering the mentioned mobility solution

MOBILITY PLAN

In %

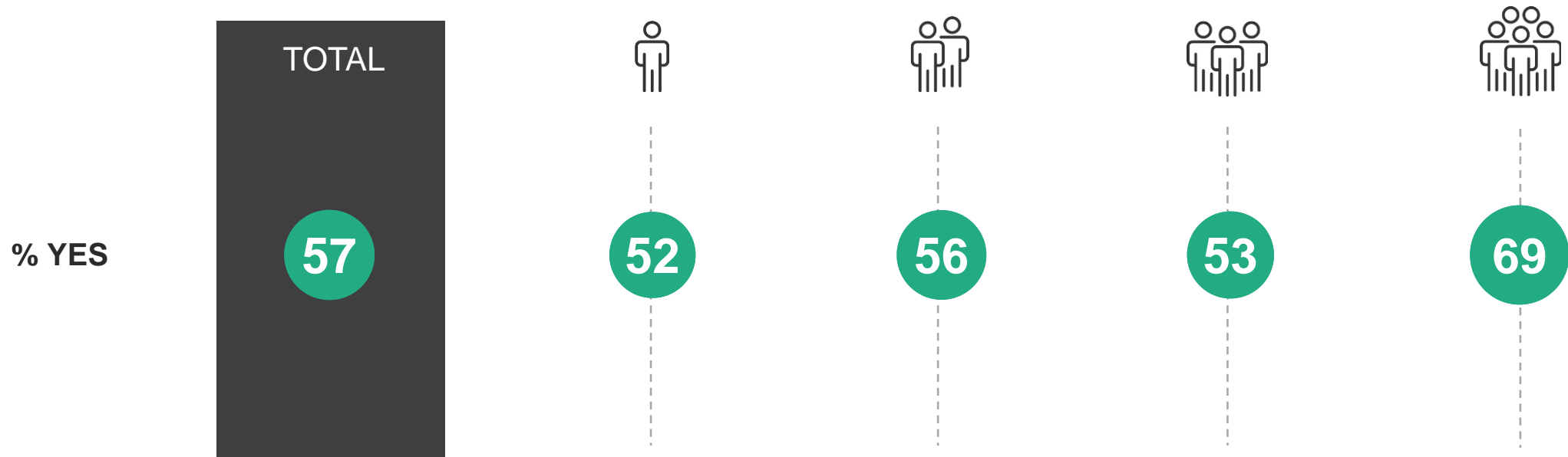
Already offering 
 ST Already offering or consider 



Do you offer or consider offering a mobility plan to all of your employees or to the ones who have a company car only?
 Basis: Companies with corporate vehicles = 100%

READY TO INTRODUCE OR INCREASE HOMEWORKING

In %



*Would you be ready to introduce or increase homeworking for your employees?
Basis: Companies with corporate vehicles = 100%*



6

HOW COMPANIES ARE FINANCING THEIR FLEET?

INSIGHT#4: OPERATING LEASING STILL THE MOST USED FINANCING SOLUTION, TOGETHER WITH SELF PURCHASE

INSIGHT 4: OPERATING LEASING STILL THE MOST USED FINANCING SOLUTION, TOGETHER WITH SELF PURCHASE

1

- Main financing methods used by Belgian companies are operating leasing (34%), self purchase (30%) and finance leasing (25%). Bigger companies tend to differentiate themselves from other European markets, with a use of operating leasing more frequent than self purchase.

2

- Although financing methods ranking is stable over the years, companies tend to evolve towards more flexible payments: among smaller companies, self purchase is less used to the main benefit of operating leasing within companies of less than 10 (+4pts), or car credit within companies from 10 to 99 (+6pts,). This trend will continue to strengthen in the near future, especially among very small companies: 50% intend to develop operating leasing (vs 29% in 2019).

3

- Among bigger companies, operating leasing is less used (-6pts) to the benefit of financing leasing (+3pts) and car credit (+3%), the latter remains a minor method used.

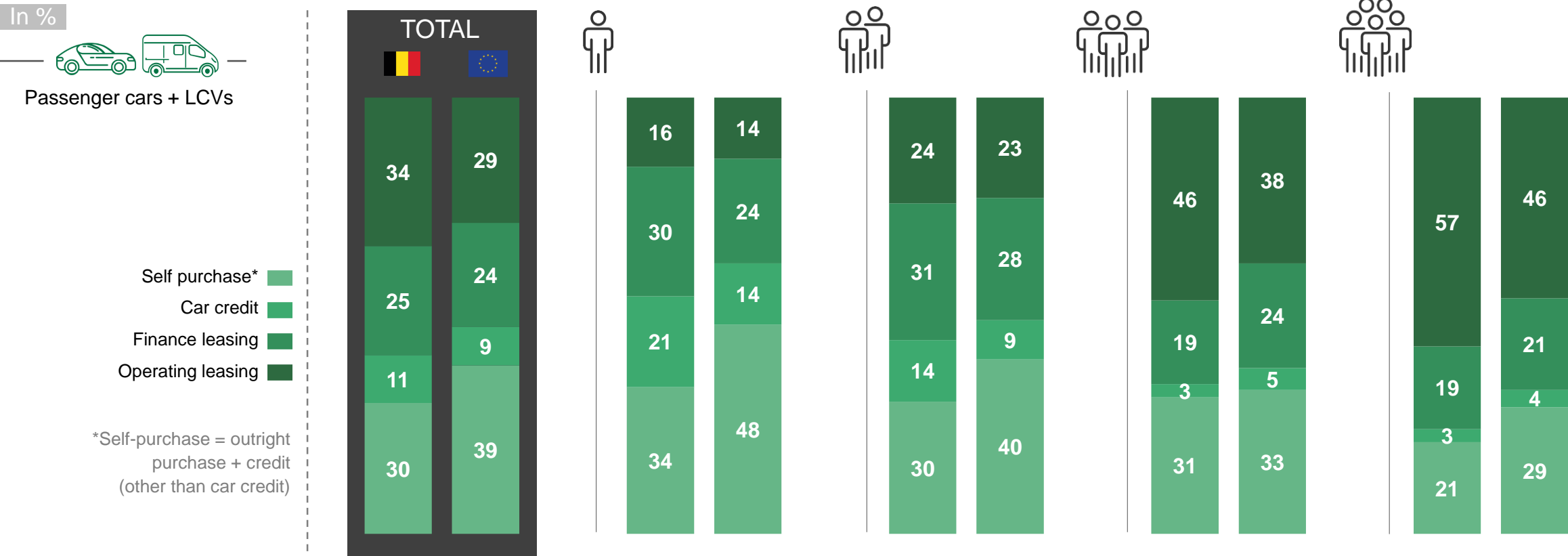
4

Belgian companies are searching for strong support and personalized advises from specialists, when they intend to buy a vehicle:

- Car manufacturer dealerships are the 1st source of information for vehicle choice, with similar advantages highlighted in SME benchmark: quality of advice (68%) and availability of the vehicle (64%). Their particular strength is also the wide choice of vehicles (65% vs SME 60%). A point of improvement is highlighted: the possibility to have a dedicated contact (56% vs SME 71%).
- Banks are the 1st source of information for car funding, with advantages also in line with SME benchmark: simple process (65%), quality of advice (56%) and dedicated contact (53%).
- They are looking for advices in particular on tax and cost optimization, but also most appropriate energies and shift to alternatives energies, whatever the company size.

MAIN FINANCING METHOD

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



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

EVOLUTION OF THE MAIN FINANCING METHOD

Focus on 1 to 9

In %



Passenger cars + LCVs



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

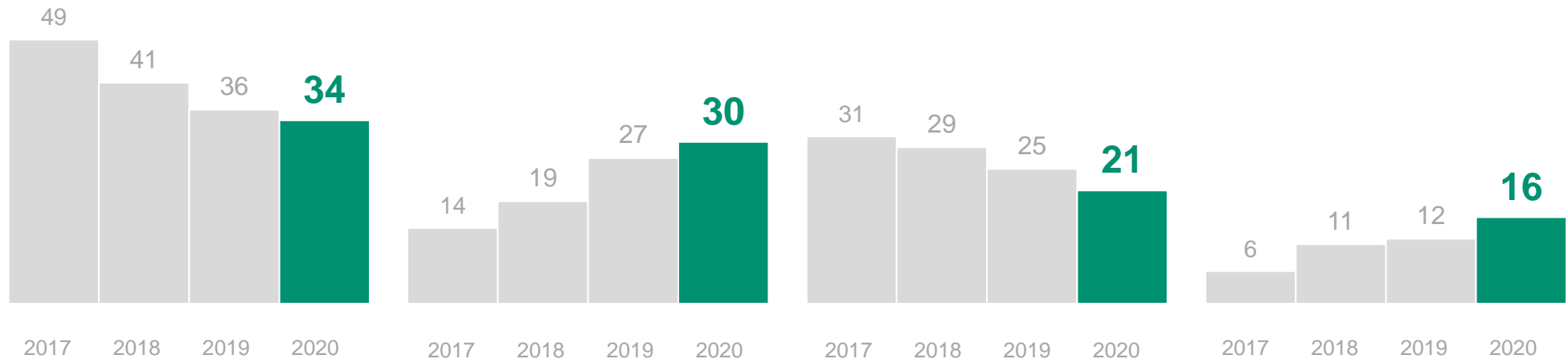
Data have been consolidated:
3 years average

Self purchase*

Finance leasing

Car credit

Operating leasing



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

EVOLUTION OF THE MAIN FINANCING METHOD

Focus on 10 to 99

In %



Passenger cars + LCVs



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

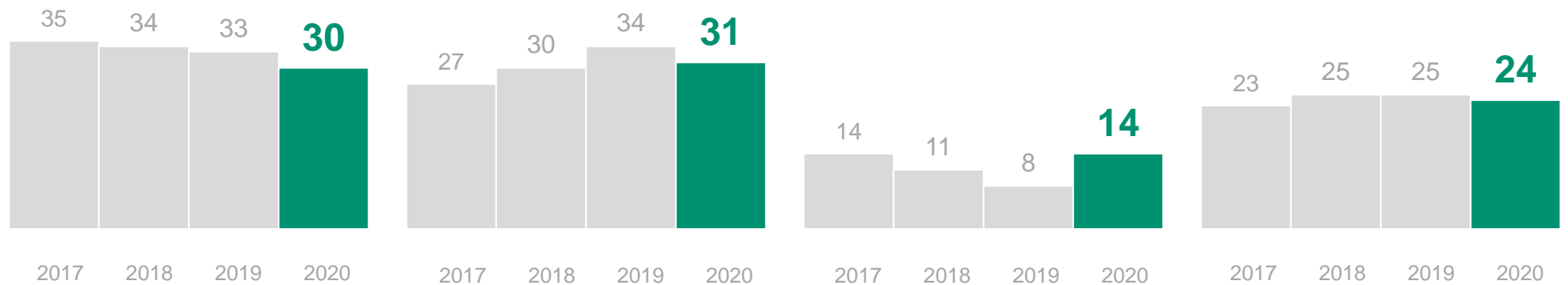
Data have been consolidated:
3 years average

Self purchase*

Finance leasing

Car credit

Operating leasing



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

EVOLUTION OF THE MAIN FINANCING METHOD

Focus on 100 to 499

In %

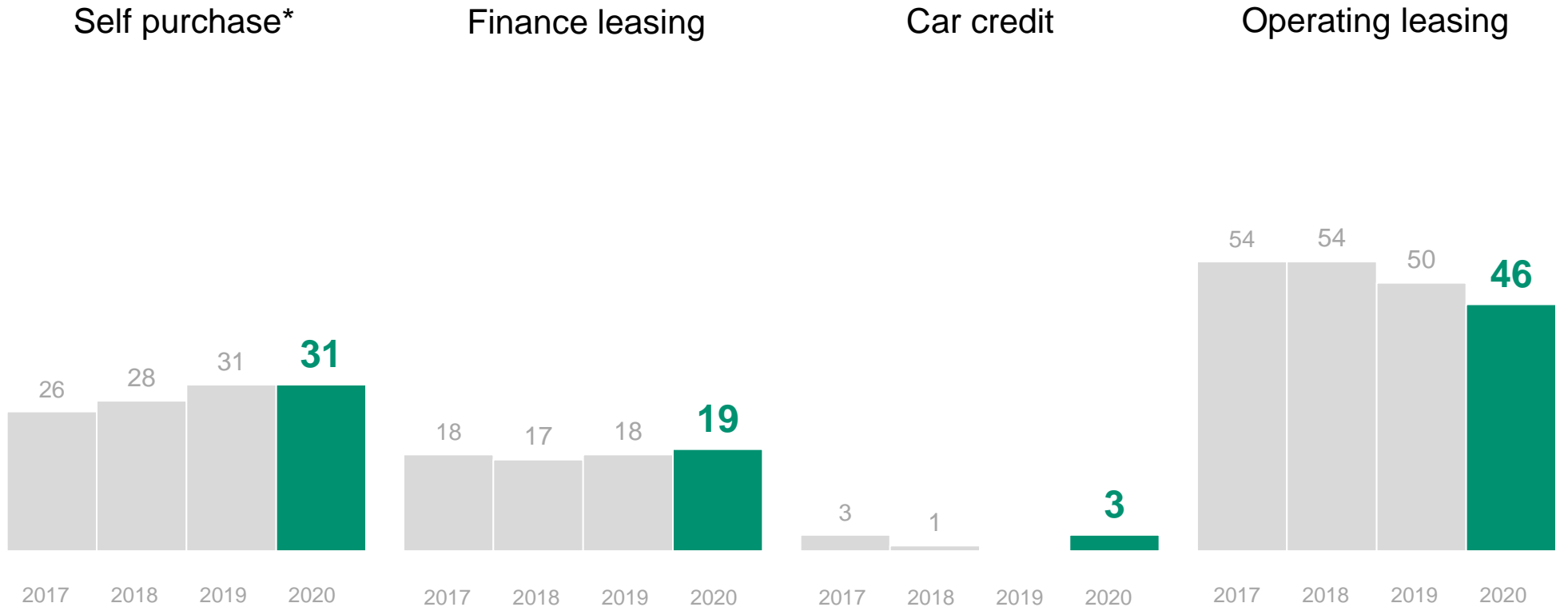


Passenger cars + LCVs



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

Data have been consolidated: 3 years average



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

EVOLUTION OF THE MAIN FINANCING METHOD

Focus on 500 and more

In %

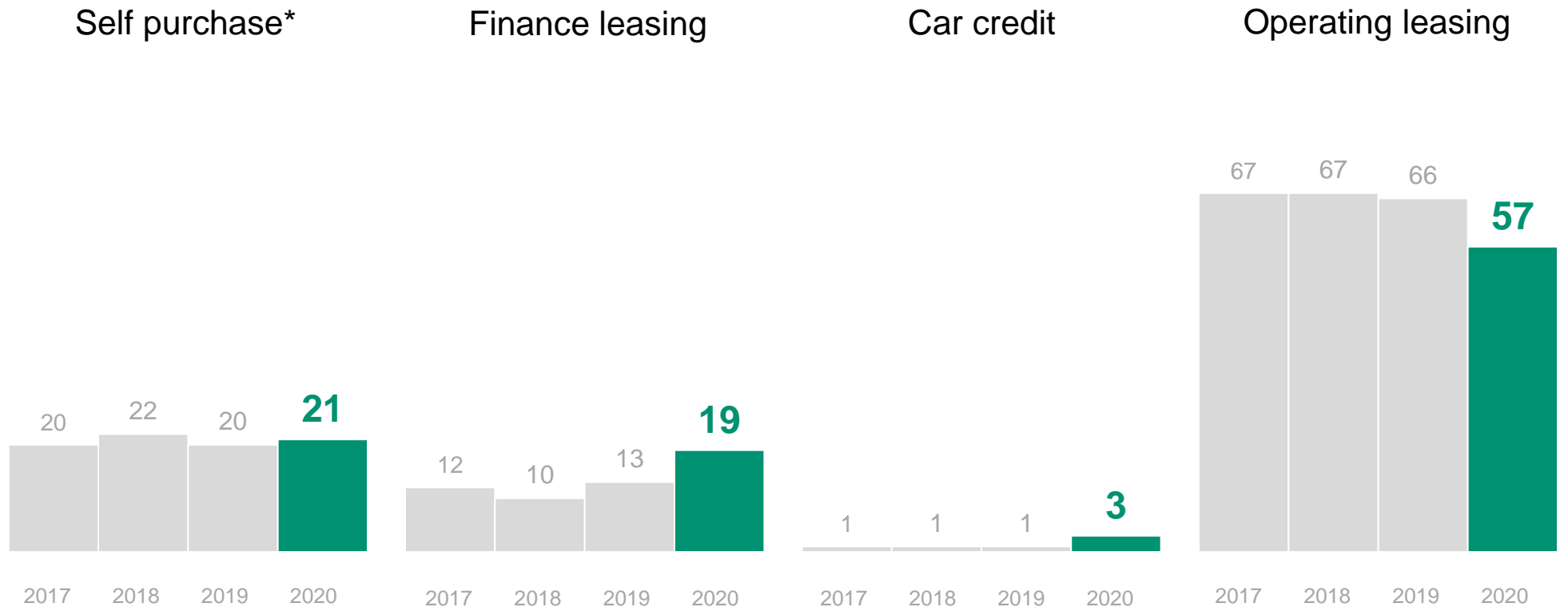


Passenger cars + LCVs



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

Data have been consolidated: 3 years average



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

EVOLUTION OF THE MAIN FINANCING METHOD

Focus on 1 to 99

In %



Passenger cars + LCVs



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

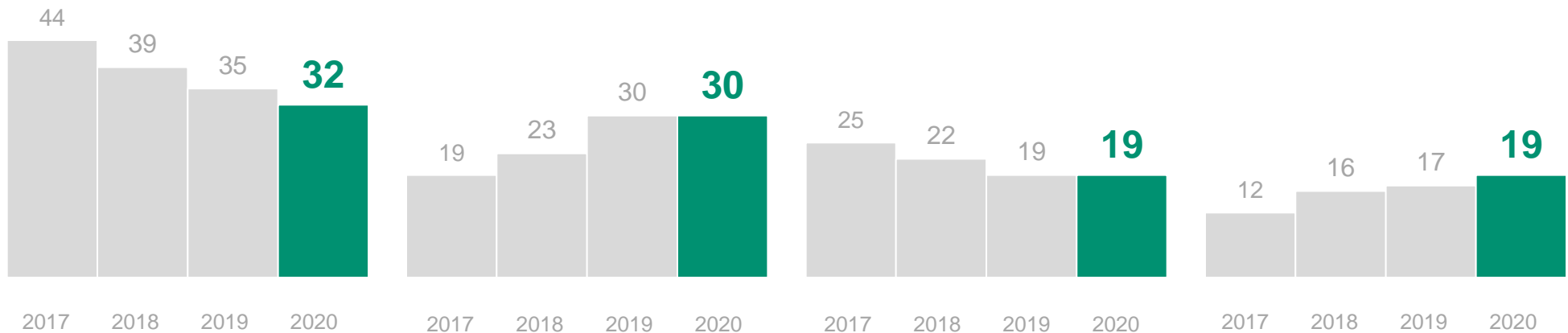
Data have been consolidated:
3 years average

Self purchase*

Finance leasing

Car credit

Operating leasing



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

EVOLUTION OF THE MAIN FINANCING METHOD

Focus on 100 and more

In %

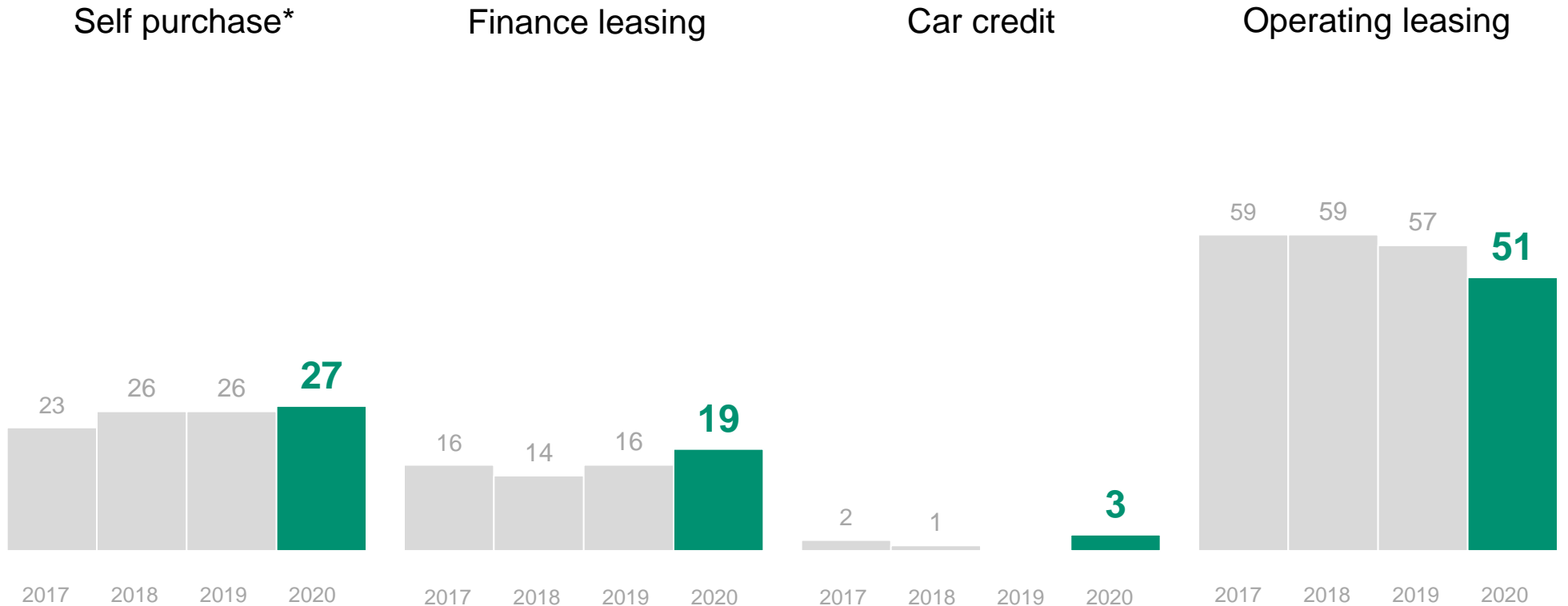


Passenger cars + LCVs



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

Data have been consolidated:
3 years average



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

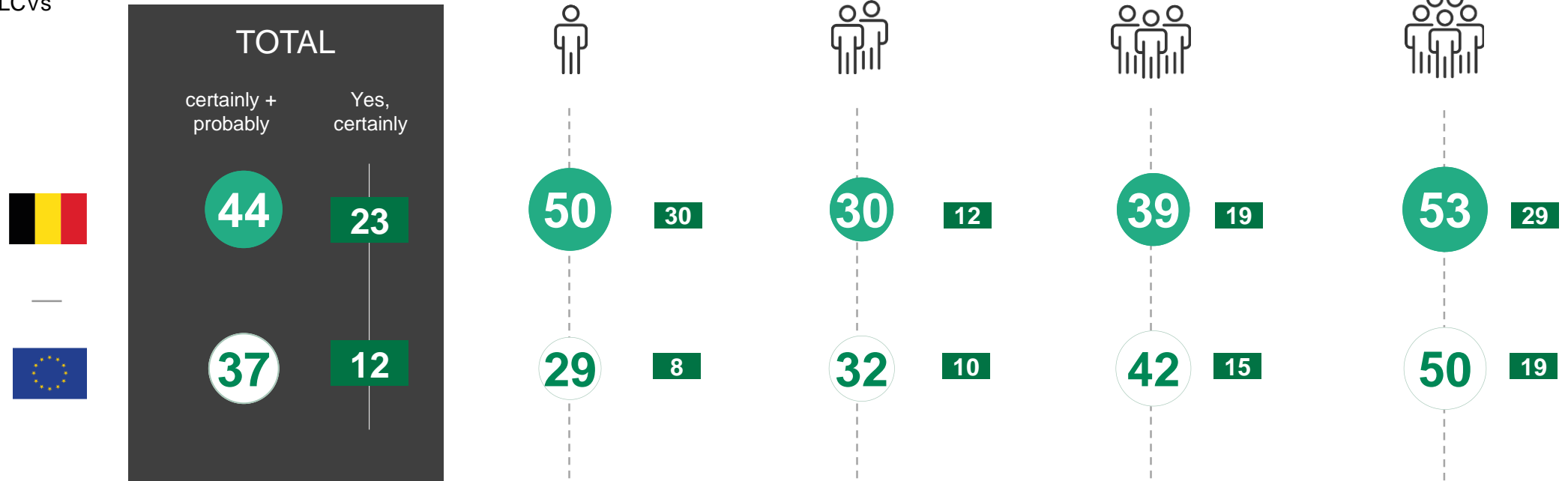
INTENTION TO DEVELOP OPERATING LEASING

Proportion of companies having the intention to develop operational leasing

In %



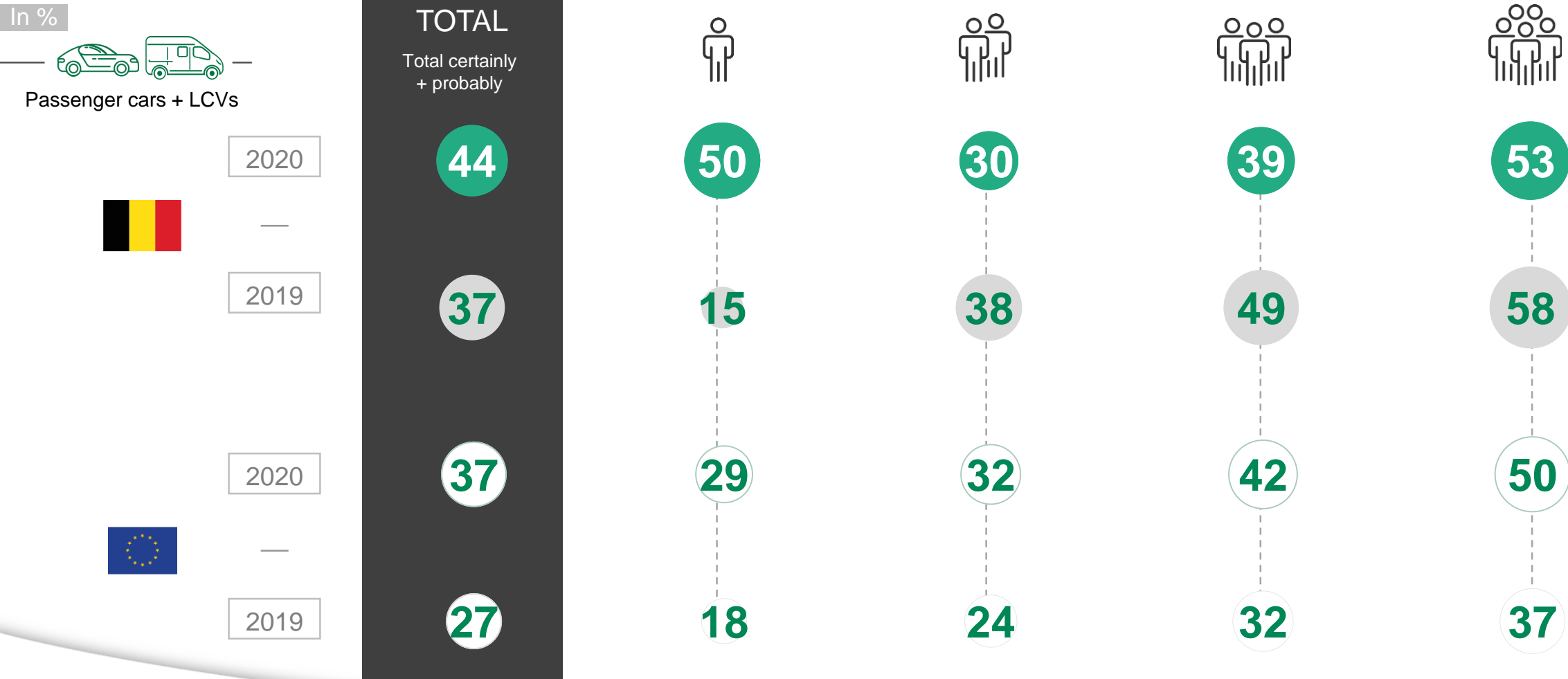
Passenger cars + LCVs



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

EVOLUTION OF THE INTENTION TO DEVELOP OPERATING LEASING

Proportion of companies having the intention to develop operational leasing



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

SUMMARY OF VEHICLE PURCHASING PATH



Focus 1 to 99

In %



Passenger cars + LCVs

#1 source of information for vehicle choice:

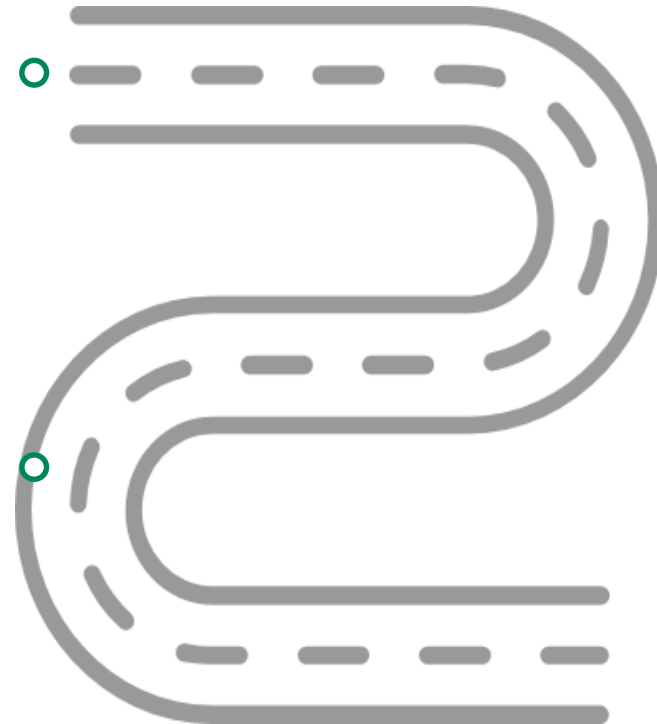
Car manufacturer dealerships

57

#1 source of information for car funding:

Your Bank

37



1 subscription channel:

Car manufacturer dealerships

43

Main advantage of this buying channel:

Quality of advice

68



Amongst the following options, what are your main information sources when choosing your company vehicles?
 Amongst the following options, what is your main information source when choosing a funding method for your company vehicles?
 Once you have decided the company vehicle and the funding method, from the following channels, where do you go next to subscribe the chosen solution?
 In your opinion, what are the advantages of each of the following buying channels?
 Basis: companies with less than 100 employees

PURCHASING PATH – CAR MANUFACTURER DEALERSHIPS (OEM DEALERSHIP)



Focus 1 to 99

In %



Passenger cars + LCVs

Car manufacturer dealerships as the main source of information for...

Vehicle choice



Funding method



Subscription via Car manufacturers



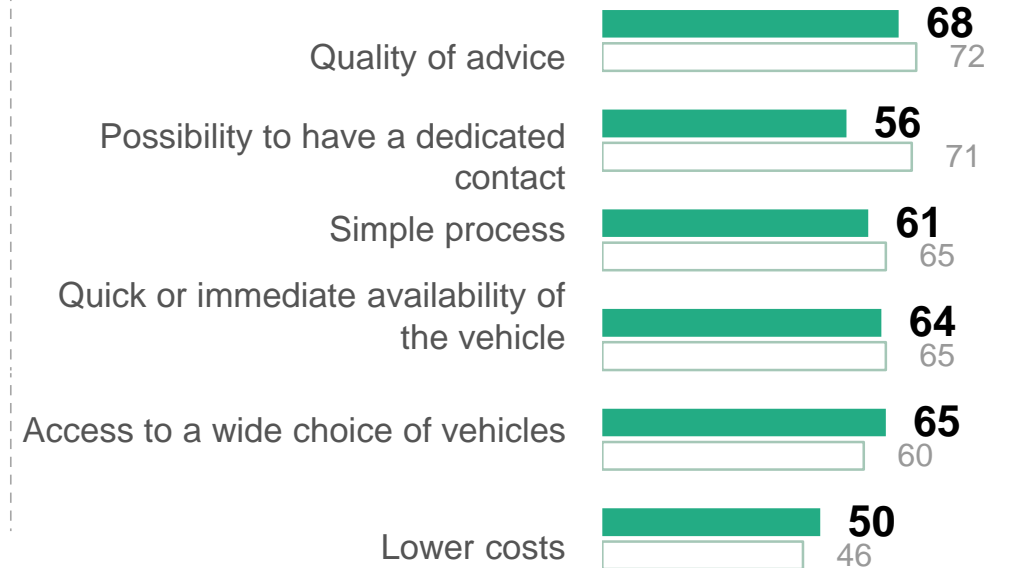
SME Benchmark*



*FR, UK, ES, PL, BE, NL



Perceived advantages (among company subscribing via car manufacturer dealerships)



Amongst the following options, what are your main information sources when choosing your company vehicles?

Amongst the following options, what is your main information source when choosing a funding method for your company vehicles?

Once you have decided the company vehicle and the funding method, from the following channels, where do you go next to subscribe the chosen solution?

In your opinion, what are the advantages of each of the following buying channels?

Basis: companies with less than 100 employees

PURCHASING PATH – INTERNET

(CAR MANUFACTURER’S WEBSITE, LEASING COMPANIES WEBSITES ...)



Focus 1 to 99

In %



Passenger cars + LCVs

Internet as the main source of information for...

Vehicle choice Funding method



39

29

Subscription via Internet

20

SME Benchmark*



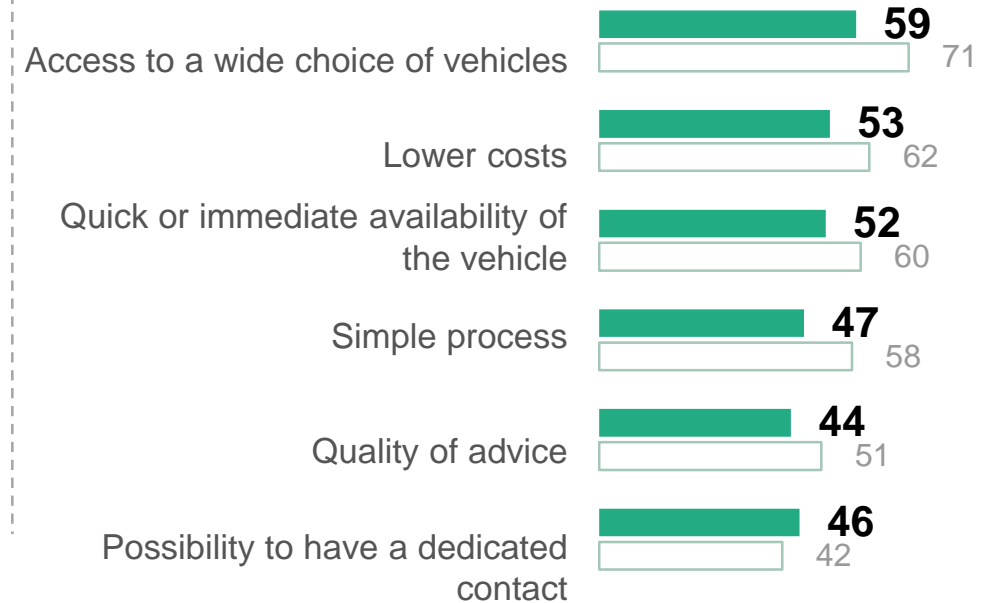
*FR, UK, ES, PL, BE, NL

41

19

15

Perceived advantages (among company subscribing via Internet)



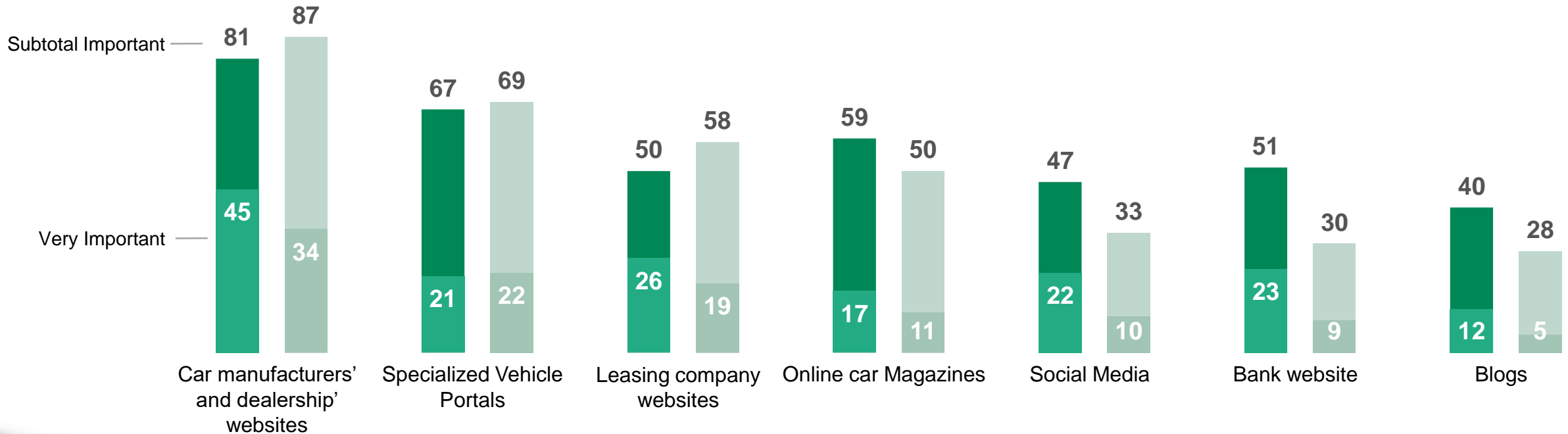
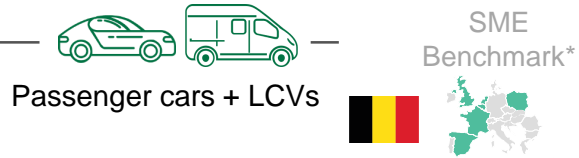
Amongst the following options, what are your main information sources when choosing your company vehicles?
 Amongst the following options, what is your main information source when choosing a funding method for your company vehicles?
 Once you have decided the company vehicle and the funding method, from the following channels, where do you go next to subscribe the chosen solution?
 In your opinion, what are the advantages of each of the following buying channels?
 Basis: companies with less than 100 employees

IMPORTANCE OF ONLINE SOURCES FOR VEHICLE CHOICE



Focus 1 to 99

In %



For each of the following sources of information, could you tell me if it is very, somewhat, quite not, not at all important to you to choose a company vehicle?
Basis: companies with less than 100 employees using Internet as a source of information when choosing a vehicle

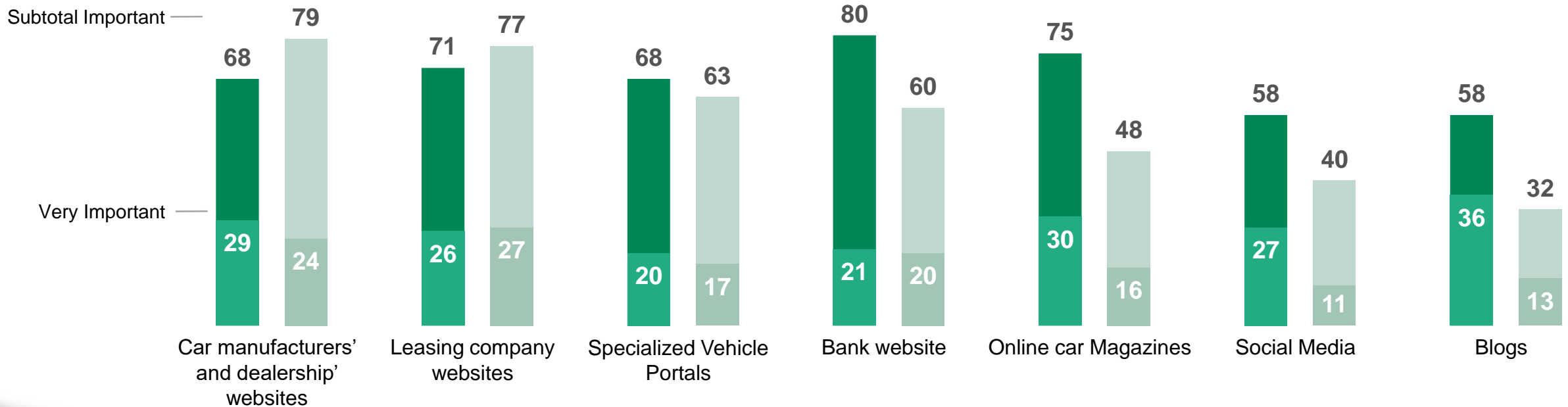
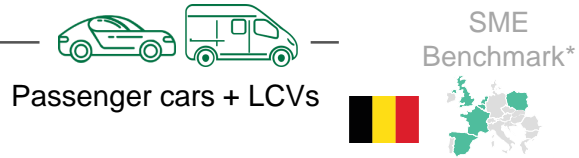
* FR, UK, ES, PL, BE, NL

IMPORTANCE OF ONLINE SOURCES FOR FUNDING METHOD



Focus 1 to 99

In %



For each of the following source of information, could you tell me if it is very, somewhat, quite not, not at all important to you to choose a funding method?
Basis: companies with less than 100 employees using Internet as a source of information when choosing a vehicle

* FR, UK, ES, PL, BE, NL

PURCHASING PATH – INDEPENDENT CAR DEALERS



Focus 1 to 99

In %



Passenger cars + LCVs

Car dealers as the main source of information for...

Category	Belgium	SME Benchmark*
Vehicle choice	25	30
Funding method	21	20



25

21

SME Benchmark*



30

20

*FR, UK, ES, PL, BE, NL

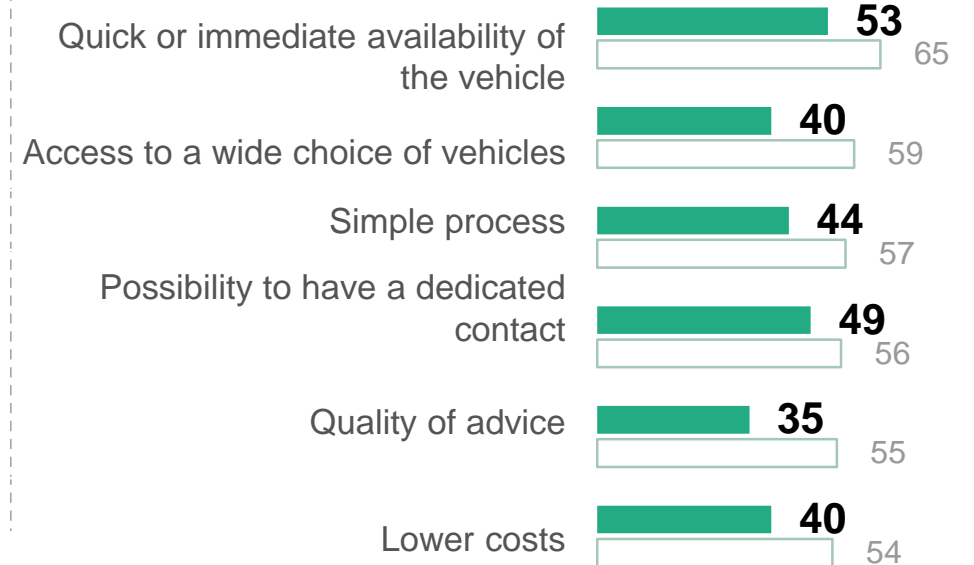
Subscription via car dealers

29

29

26

Perceived advantages (among company subscribing via car dealers)



Amongst the following options, what are your main information sources when choosing your company vehicles?
 Amongst the following options, what is your main information source when choosing a funding method for your company vehicles?
 Once you have decided the company vehicle and the funding method, from the following channels, where do you go next to subscribe the chosen solution?
 In your opinion, what are the advantages of each of the following buying channels?
 Basis: companies with less than 100 employees

PURCHASING PATH – LEASING COMPANIES



Focus 1 to 99

In %



Passenger cars + LCVs

Leasing companies as the main source of information for...

Vehicle choice

Funding method



29

25

Subscription via leasing companies

26

SME Benchmark*



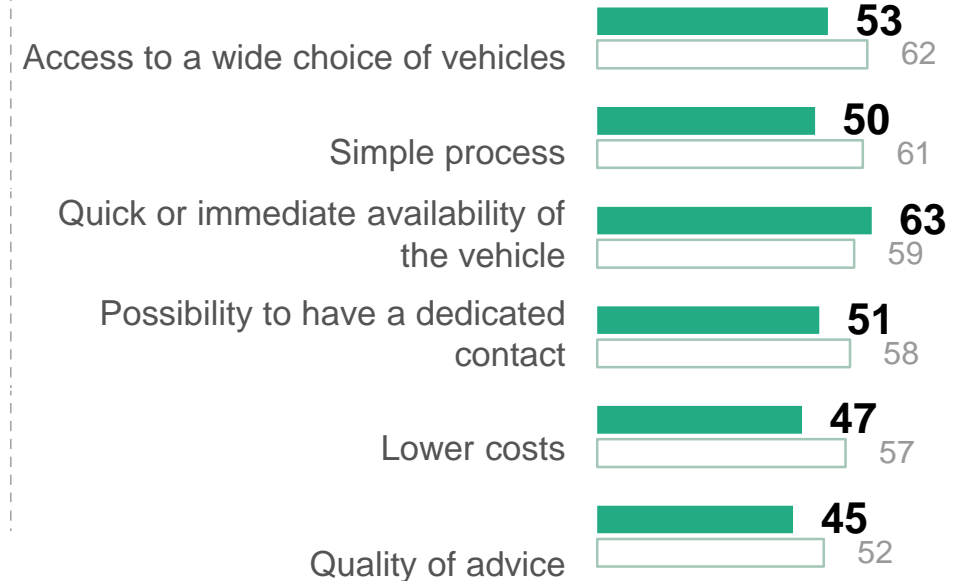
*FR, UK, ES, PL, BE, NL

31

33

29

Perceived advantages
(among company subscribing via leasing companies)



Amongst the following options, what are your main information sources when choosing your company vehicles?
 Amongst the following options, what is your main information source when choosing a funding method for your company vehicles?
 Once you have decided the company vehicle and the funding method, from the following channels, where do you go next to subscribe the chosen solution?
 In your opinion, what are the advantages of each of the following buying channels?
 Basis: companies with less than 100 employees

PURCHASING PATH – BANK (LOCAL AGENCY)



Focus 1 to 99

In %



Passenger cars + LCVs

Bank as the main source of information for...

Vehicle choice Funding method



16

37

Subscription via the bank

37

SME Benchmark*



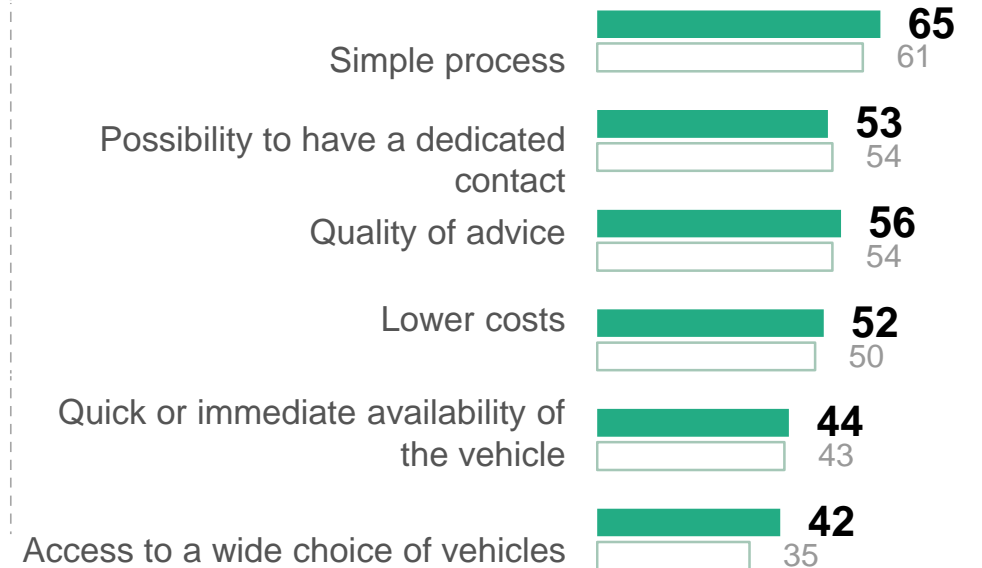
15

40

31

*FR, UK, ES, PL, BE, NL

Perceived advantages (among company subscribing via the bank)



Amongst the following options, what are your main information sources when choosing your company vehicles?
 Amongst the following options, what is your main information source when choosing a funding method for your company vehicles?
 Once you have decided the company vehicle and the funding method, from the following channels, where do you go next to subscribe the chosen solution?
 In your opinion, what are the advantages of each of the following buying channels?
 Basis: companies with less than 100 employees

PURCHASING PATH – BROKERS



Focus 1 to 99

In %



Passenger cars + LCVs

Brokers as the main source of information for...

Vehicle choice

Funding method



13

13

Subscription via brokers

13

Perceived advantages
(among company subscribing via brokers)

Very low basis (<30)

Results not shown

SME Benchmark*



*FR, UK, ES, PL, BE, NL

12

11

9

Amongst the following options, what are your main information sources when choosing your company vehicles?
 Amongst the following options, what is your main information source when choosing a funding method for your company vehicles?
 Once you have decided the company vehicle and the funding method, from the following channels, where do you go next to subscribe the chosen solution?
 In your opinion, what are the advantages of each of the following buying channels?
 Basis: companies with less than 100 employees

OTHER SOURCES OF INFORMATION



Focus 1 to 99

In %



Passenger cars + LCVs

PROFESSIONAL ASSOCIATIONS

WORD OF MOUTH

Main source of information for...

Main source of information for...

Vehicle choice

Funding method

Vehicle choice

Funding method



12

12

31

18

SME Benchmark*



*FR, UK, ES, PL, BE, NL

8

7

36

18

Amongst the following options, what are your main information sources when choosing your company vehicles?
 Amongst the following options, what is your main information source when choosing a funding method for your company vehicles?
 Basis: companies with less than 100 employees

NEED FOR ADVICES FROM AN EXTERNAL SUPPLIER

In %



Would you be interested in receiving advices from an external supplier on the following topics?
Basis: Companies with corporate vehicles = 100%



7

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

INSIGHT#5: AN ADVANCED MARKET IN THE USAGE OF
TELEMATICS TOO, FOR CONTROL AND SAFETY REASONS
FIRST

INSIGHT 5: AN ADVANCED MARKET IN THE USAGE OF TELEMATICS TOO, FOR CONTROL AND SAFETY REASONS FIRST

1

- Belgian is an advanced market in the usage of telematics too, with 48% companies using them (vs EU 33%). This usage stands for all kinds of vehicles: passenger cars, benefit cars, tool cars and LCVs. This usage is also more wide spread in smaller companies in Belgium than in their EU counterparts (49% of the < 10 employees companies in Belgium, vs. 20% only in EU).

2

- They are particularly motivated in using telematics for control and safety reasons mainly, such as: locating vehicles or improve vehicle security (46%), improving drivers safety (42%) or avoiding not allowed usage (36%). On the other side, they are less convinced about operational efficiency (35%), but as other European countries.

3

- Barriers in using telematics are similar to European average, although one concern in particular is more highlighted than the others: telematics are perceived as too intrusive for drivers, especially on passenger cars, for 49% of Belgian companies (vs EU 38%).

4

- Belgian companies are also considering actions to increase road safety: 52% of them already implemented or consider to buy vehicles with native device relating to road safety on it ; 42%, aftermarket / retrofit in order to alert the driver. These actions are driven by big companies but also very small companies, which continue to demonstrate their ability to adapt themselves quickly.

PROPORTION OF COMPANIES USING TELEMATICS

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

In %

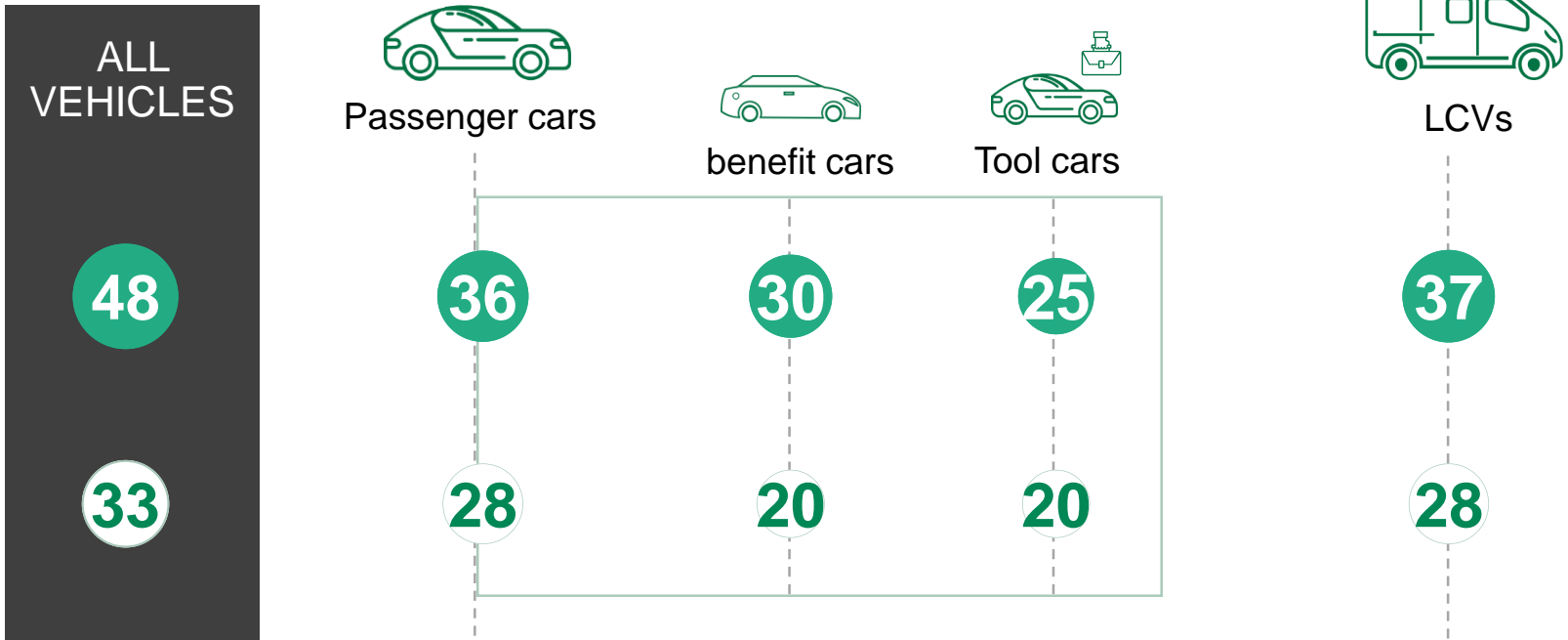


HOW TO READ THE RESULTS ?

48% of companies with fleet use telematics for all or part of their fleet.

Among companies owning passenger cars, 36% use telematics for passenger cars, 30% use telematics for benefit cars, 25% for tool cars.

Among companies owning LCVs, 37% use telematics for LCVs.



Is your fleet connected thanks to Telematics tool? Telematics enables transmission of data 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

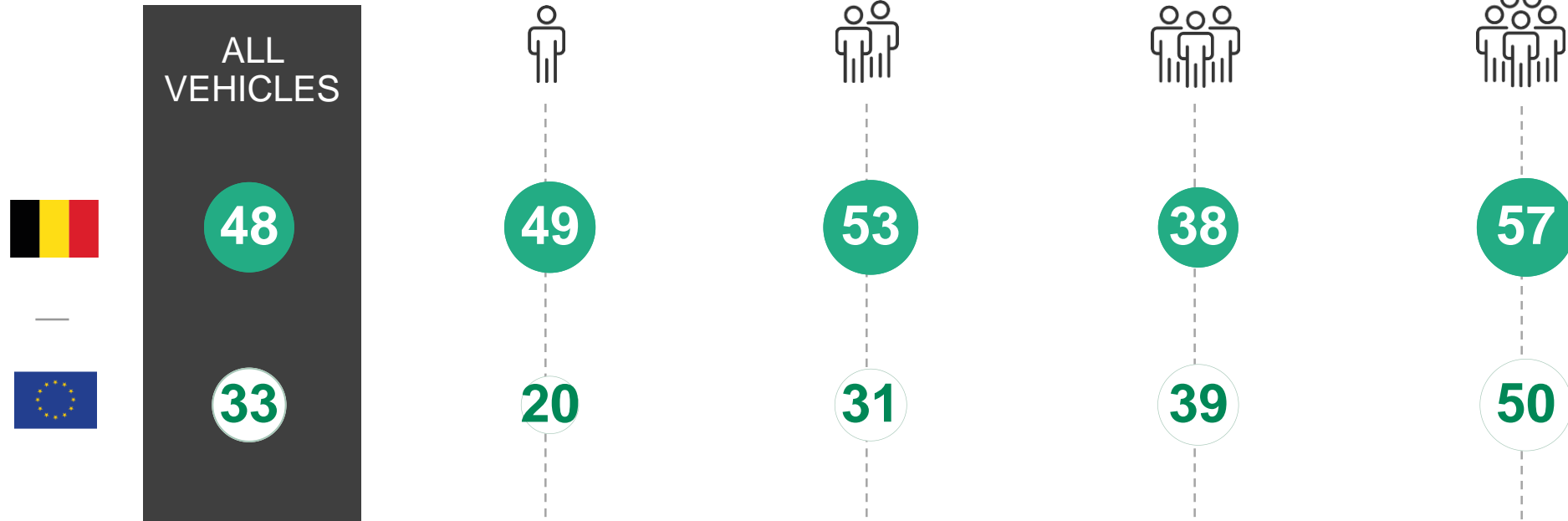
PROPORTION OF COMPANIES USING TELEMATICS

In %



Passenger cars + LCVs

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



Is your fleet connected thanks to Telematics tool? Telematics enables transmission of data 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 vehicles = 100%

REASONS FOR USING TELEMATICS

All vehicles



In %



Passenger cars + LCVs



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

REASONS FOR USING TELEMATICS

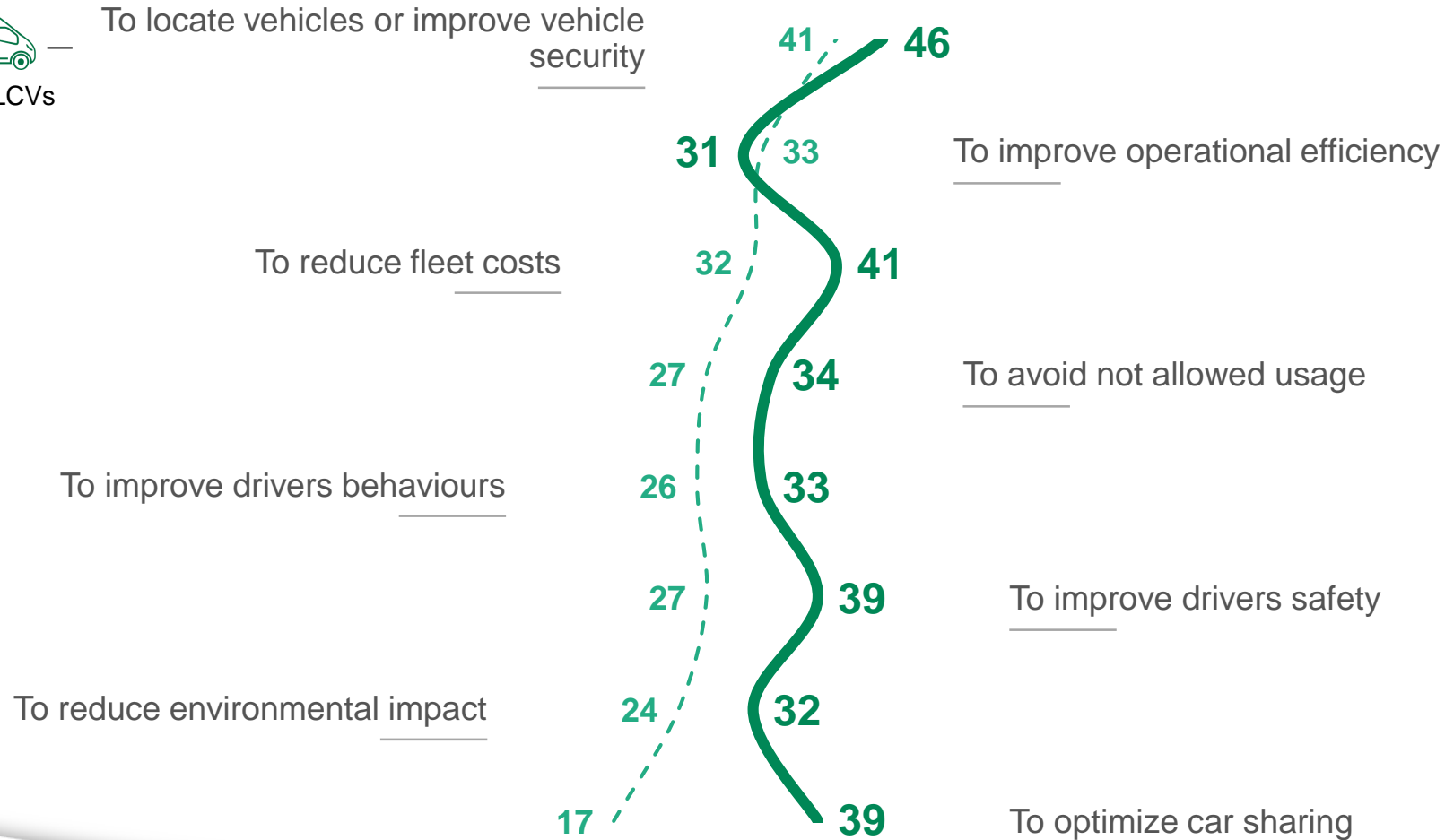
All vehicles - Focus on 1 to 99



In %



Passenger cars + LCVs



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

REASONS FOR USING TELEMATICS

All vehicles - Focus on 100 and more



In %



Passenger cars + LCVs

To locate vehicles or improve vehicle security



To reduce fleet costs

To improve drivers behaviours

To reduce environmental impact



To improve operational efficiency

To avoid not allowed usage

To improve drivers safety

To optimize car sharing

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



8

TELEMATICS, DIGITAL TOOLS AND ROAD SAFETY

A. PASSENGER CARS

PROPORTION OF COMPANIES USING TELEMATICS

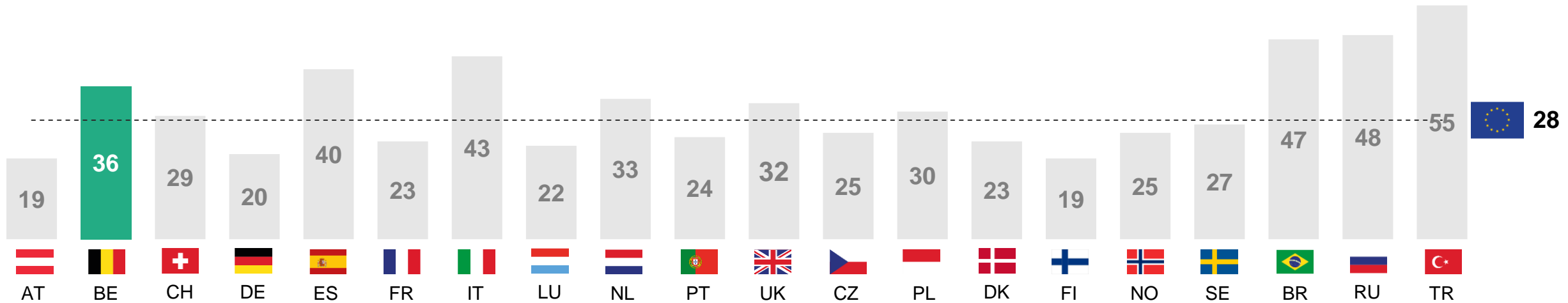
Passenger cars

In %



Passenger cars

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



Is your fleet connected thanks to Telematics tool? Telematics enables transmission of data 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 TELEMATICS

In %



Passenger cars

HOW TO READ THE RESULTS ?

Among companies owning passenger cars, 36% use telematics.

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

Basis: companies with at least one passenger car in fleet



36



28



44

20



30

24



31

30



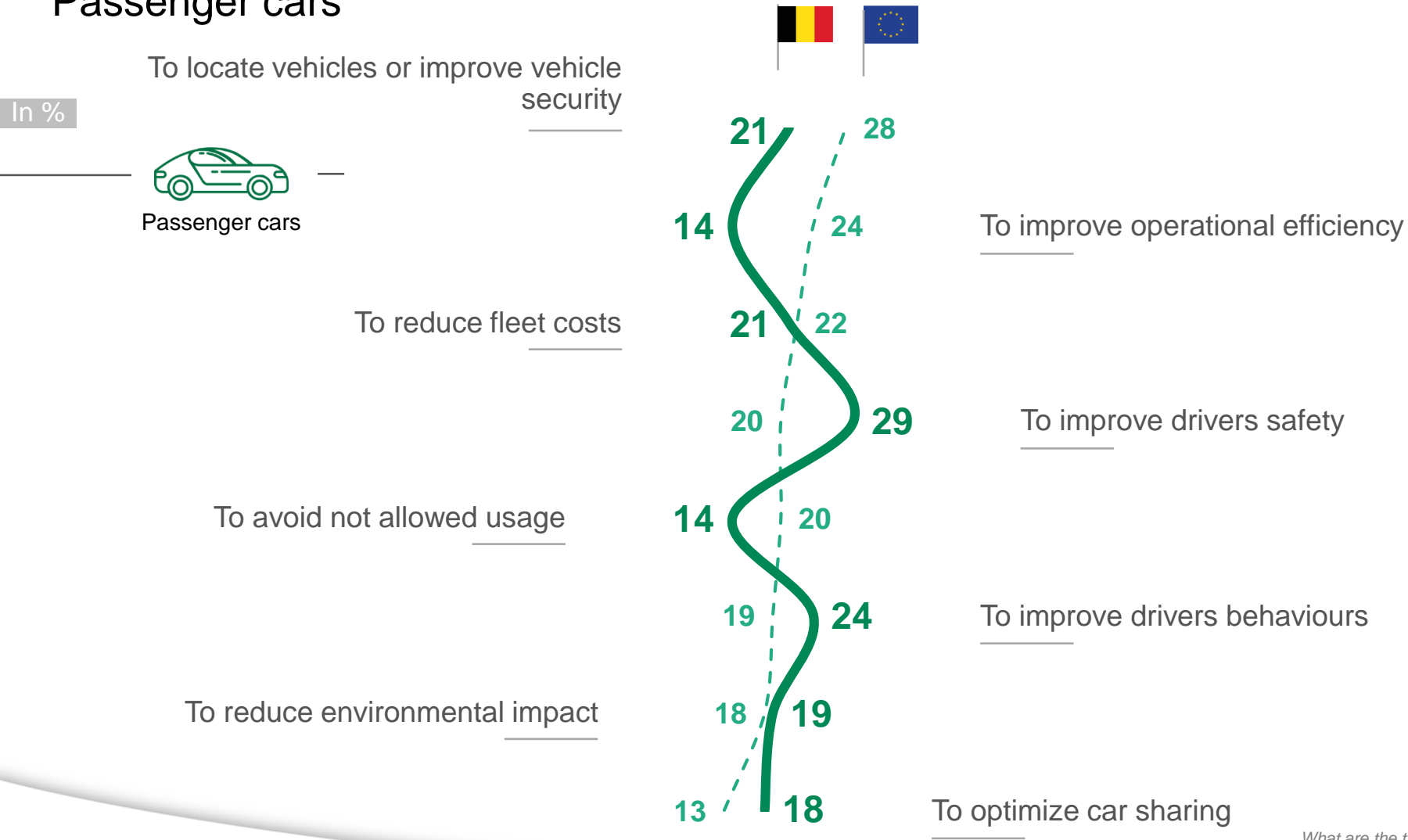
37

39

Is your fleet connected thanks to Telematics tool? Telematics enables transmission of data 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

REASONS FOR USING TELEMATICS

Passenger cars



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

BARRIERS FOR USING TELEMATICS

Passenger cars



In %



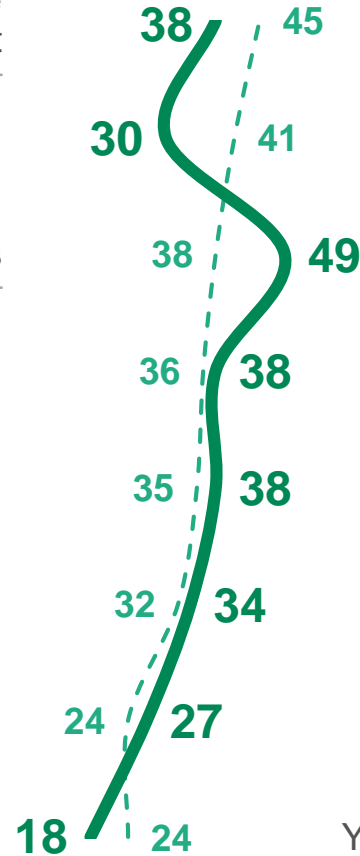
Passenger cars

You are not convinced that there will be a return on investment

Telematics is too intrusive for the drivers

You have some concerns that employees will not accept it

You have some concerns that Trade Unions or work councils may not accept it



You are not convinced that the data provided will be useful for your business operation

There is not enough resource available to manage the data effectively.

You have some concerns on managing the data under GDPR

You are not convinced that it works

*What are the barriers to Telematics usage in the future?
Basis: companies with passenger cars which have not implemented Telematics*

ACTIONS SET UP TO INCREASE ROAD SAFETY



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



8

TELEMATICS, DIGITAL TOOLS AND ROAD SAFETY

B. BENEFIT CARS

PROPORTION OF COMPANIES USING TELEMATICS

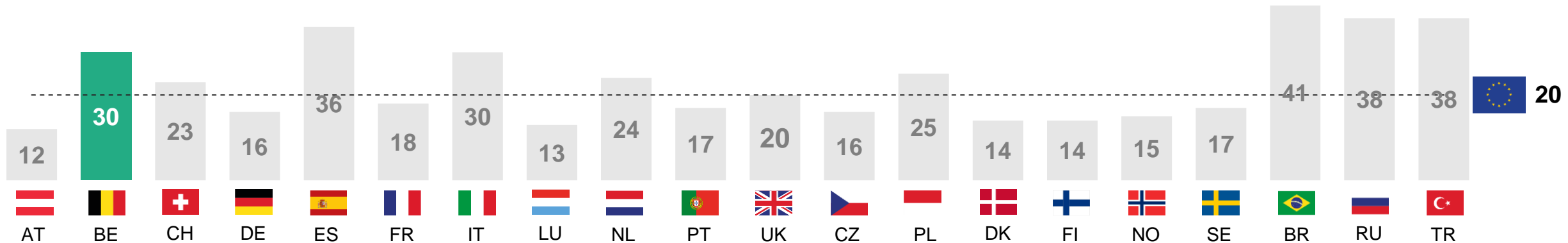
Benefit cars

In %



Benefit cars

PROPORTION OF COMPANIES HAVING IMPLEMENTED
TELEMATICS IN THEIR BENEFIT CARS



Is your fleet connected thanks to Telematics tool? Telematics enables transmission of data 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 TELEMATICS

In %



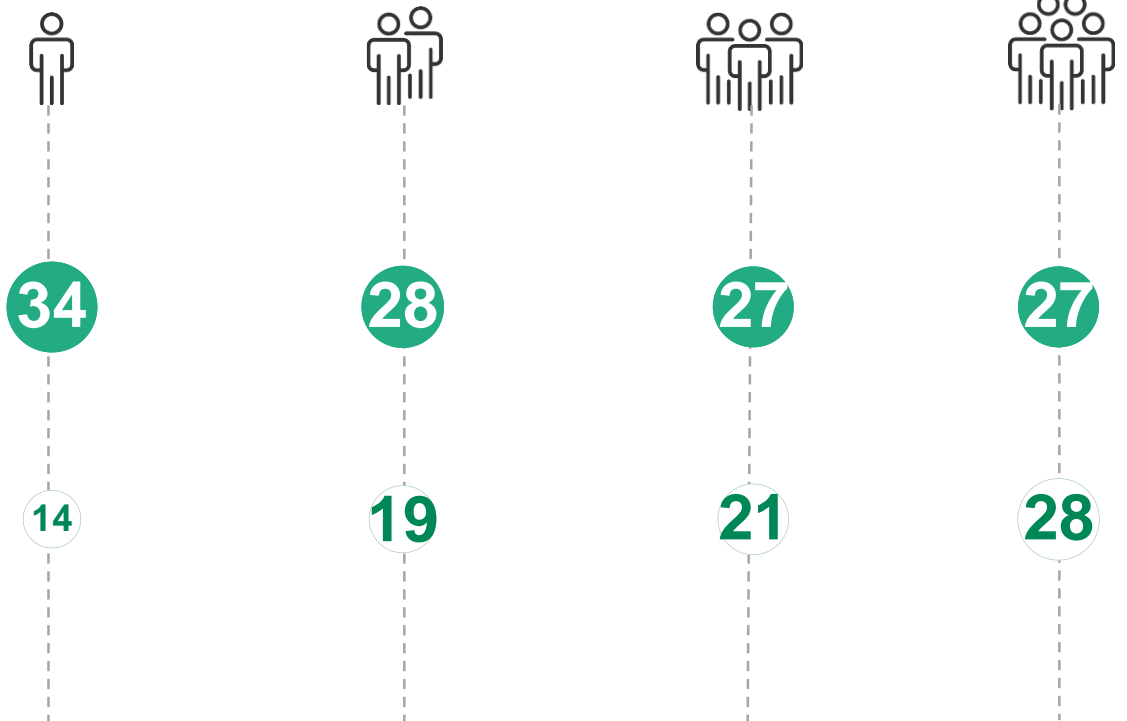
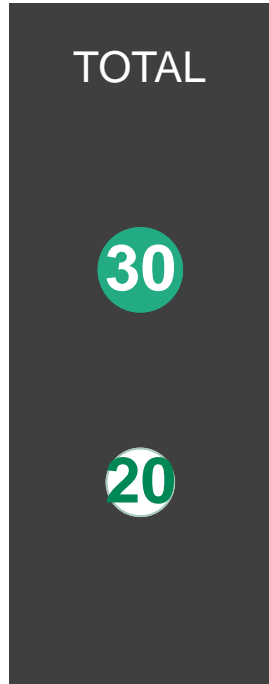
Benefit cars

HOW TO READ THE RESULTS ?

Among companies owning passenger cars, 30% use telematics for benefit cars.

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

Basis: companies with at least one passenger car in fleet



Is your fleet connected thanks to Telematics tool? Telematics enables transmission of data 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

REASONS FOR USING TELEMATICS

Benefit cars



In %



Benefit cars

To locate vehicles or improve vehicle security

To reduce fleet costs

To improve drivers safety

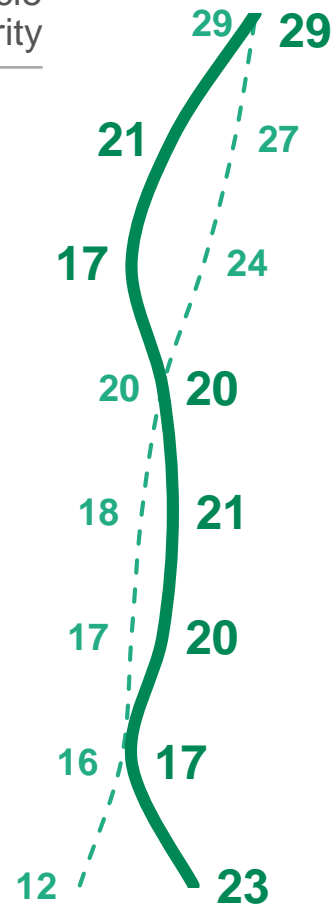
To improve drivers behaviours

To improve operational efficiency

To avoid not allowed usage

To reduce environmental impact

To optimize car sharing



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

BARRIERS TO TELEMATICS

Benefit cars

In %



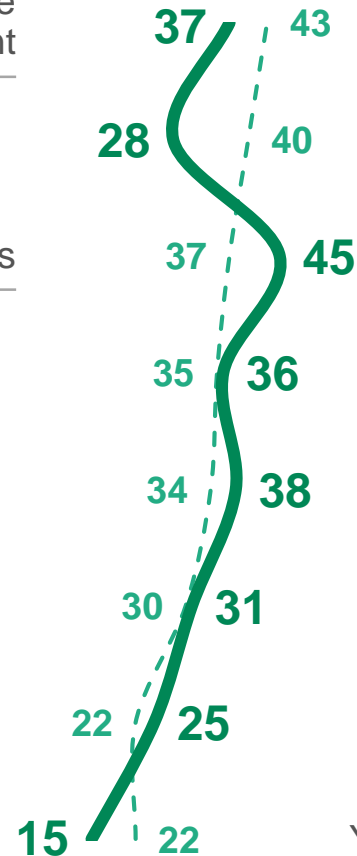
Benefit cars

You are not convinced that there will be a return on investment

Telematics is too intrusive for the drivers

You have some concerns that employees will not accept it

You have some concerns that Trade Unions or work councils may not accept it



You are not convinced that the data provided will be useful for your business operation

There is not enough resource available to manage the data effectively.

You have some concerns on managing the data under GDPR

You are not convinced that it works

*What are the barriers to Telematics usage in the future?
Basis: companies with benefit cars which have not implemented Telematics*



8

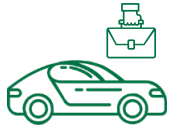
TELEMATICS, DIGITAL TOOLS AND ROAD SAFETY

C. TOOL CARS

PROPORTION OF COMPANIES USING TELEMATICS

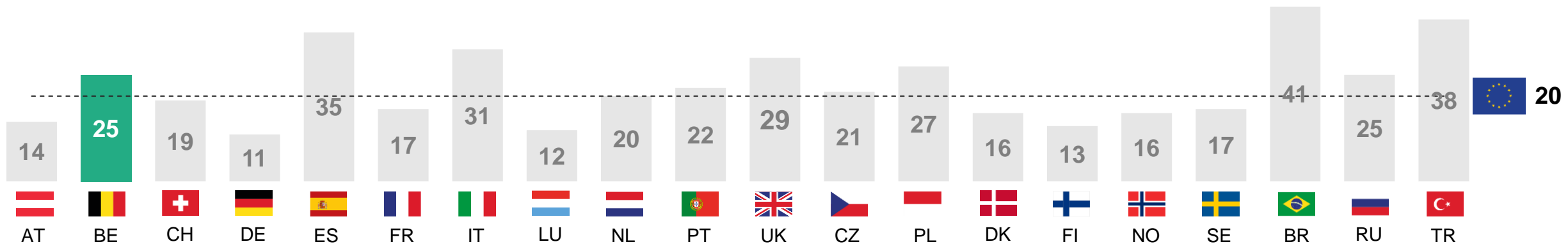
Tool cars

In %



Tool cars

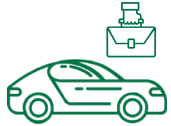
PROPORTION OF COMPANIES HAVING IMPLEMENTED
TELEMATICS IN THEIR TOOL CARS



Is your fleet connected thanks to Telematics tool? Telematics enables transmission of data 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 TELEMATICS

In %



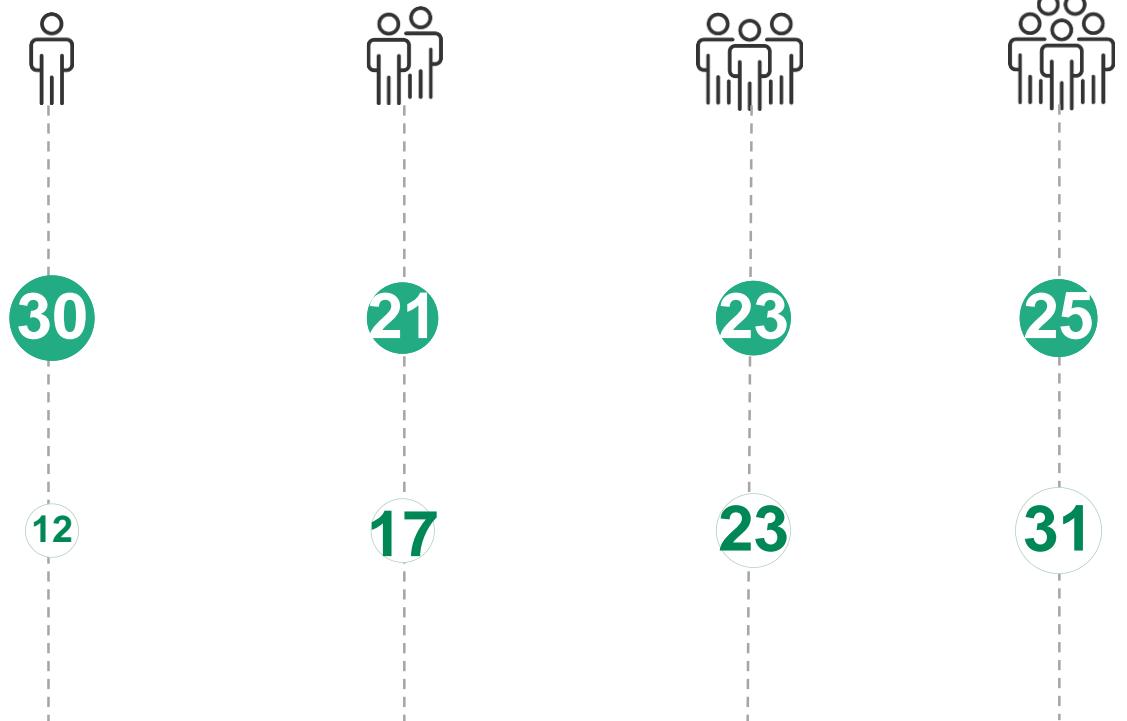
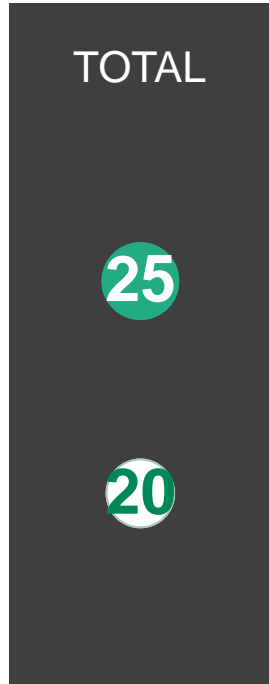
Tool cars

HOW TO READ THE RESULTS ?

Among companies owning passenger cars, 25% use telematics for tool cars

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

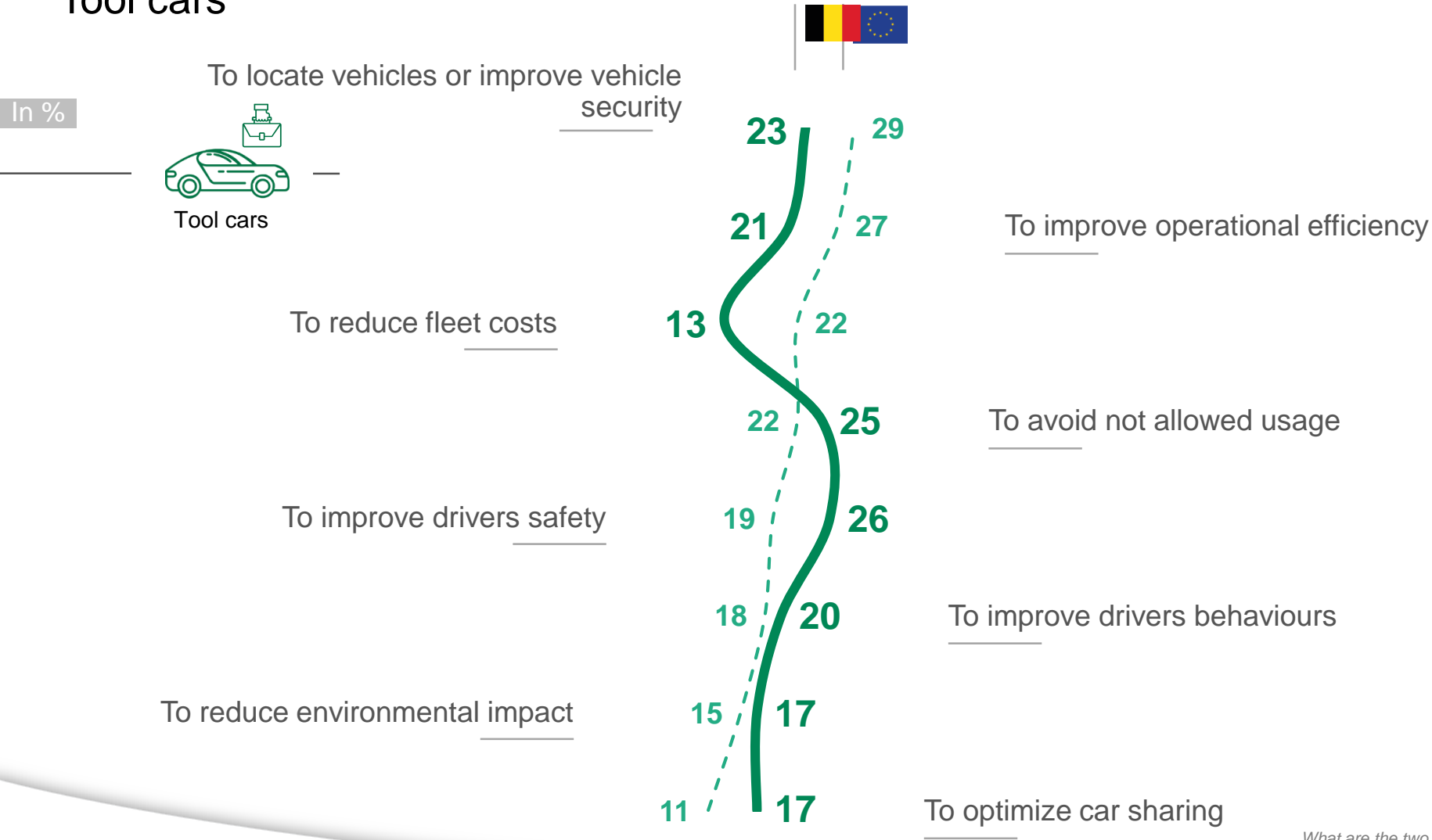
Basis: companies with at least one passenger car in fleet



Is your fleet connected thanks to Telematics tool? Telematics enables transmission of data 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

REASONS FOR USING TELEMATICS

Tool cars



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

BARRIERS TO TELEMATICS

Tool cars

In %



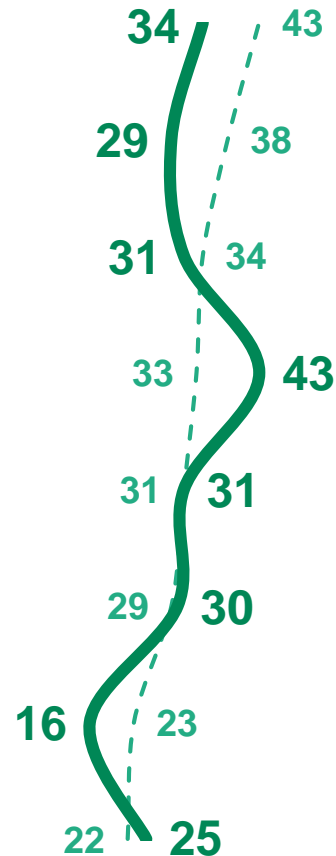
Tool cars

You are not convinced that there will be a return on investment

There is not enough resource available to manage the data effectively.

You have some concerns that employees will not accept it

You are not convinced that it works



You are not convinced that the data provided will be useful for your business operation

Telematics is too intrusive for the drivers

You have some concerns on managing the data under GDPR

You have some concerns that Trade Unions or work councils may not accept it

*What are the barriers to telematics usage in the future?
Basis: companies with tool cars which have not implemented Telematics*



8

TELEMATICS, DIGITAL TOOLS AND ROAD SAFETY

D. LCVs

PROPORTION OF COMPANIES USING TELEMATICS

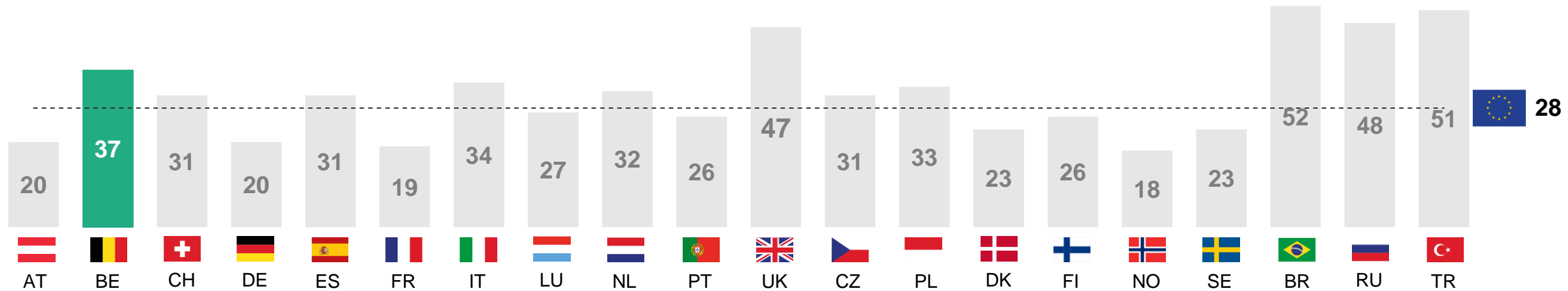
LCVs

In %



LCVs

PROPORTION OF COMPANIES HAVING IMPLEMENTED TELEMATICS IN THEIR LCVS



Is your fleet connected thanks to Telematics tool? Telematics enables transmission of data 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 LCVs

PROPORTION OF COMPANIES USING TELEMATICS

In %



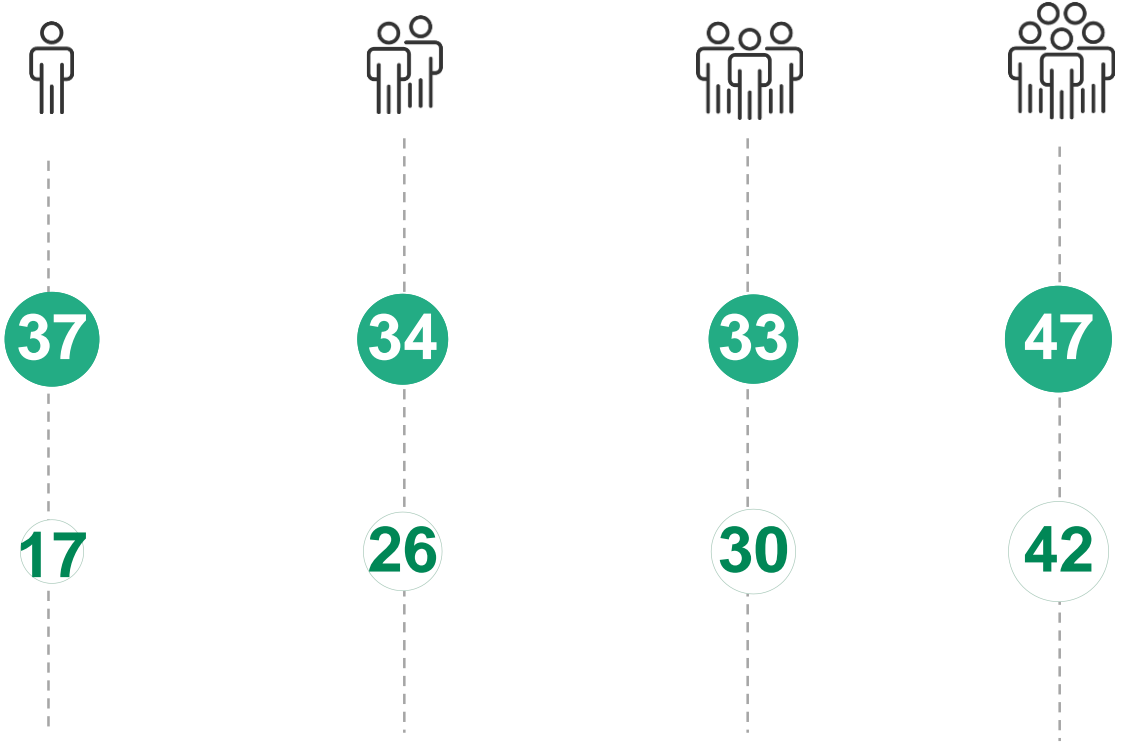
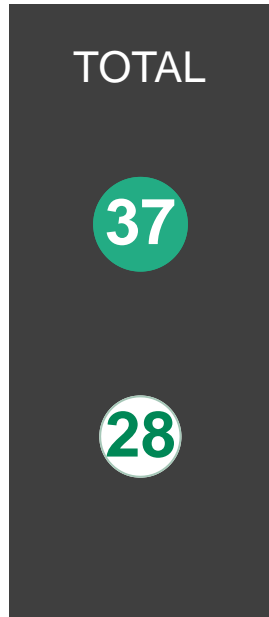
LCVs

HOW TO READ THE RESULTS ?

Among companies owning LCVs, 37% use telematics for LCVs

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

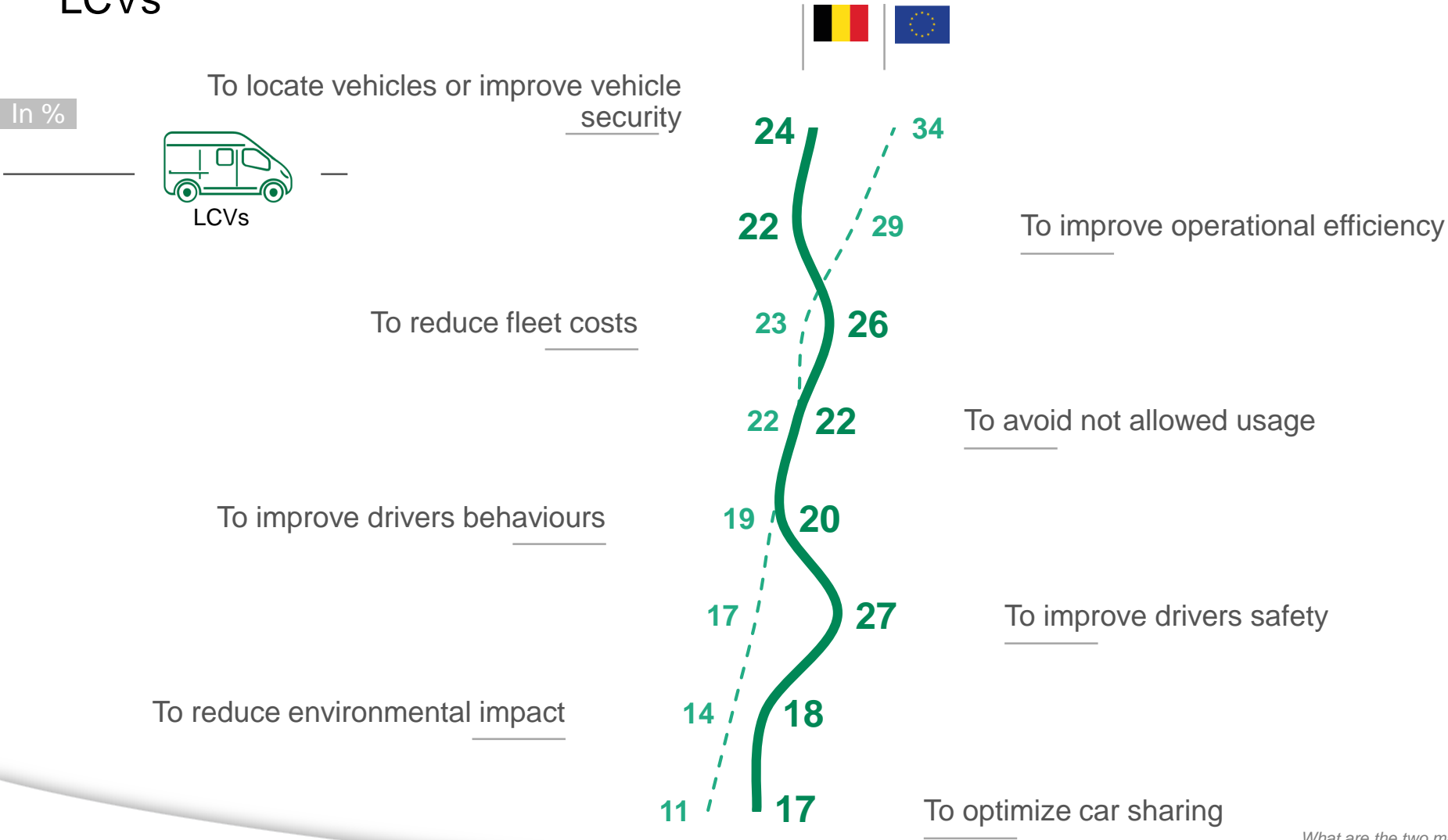
Basis: companies with at least one LCV in fleet



Is your fleet connected thanks to Telematics tool? Telematics enables transmission of data 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 LCVs

REASONS FOR USING TELEMATICS

LCVs



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

BARRIERS TO TELEMATICS

LCVs

In %



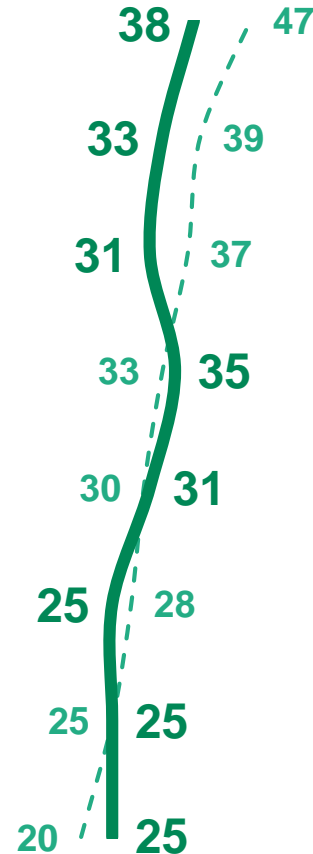
LCVs

You are not convinced that there will be a return on investment

There is not enough resource available to manage the data effectively.

You have some concerns that employees will not accept it

You are not convinced that it works



You are not convinced that the data provided will be useful for your business operation

Telematics is too intrusive for the drivers

You have some concerns on managing the data under GDPR

You have some concerns that Trade Unions or work councils may not accept it

*What are the barriers to telematics usage in the future?
Basis: companies with LCVs which have not implemented Telematics*

A high-angle, long-exposure photograph of a busy city street. The image is heavily blurred, capturing the motion of a large crowd of people walking. The ground is paved with large, light-colored rectangular tiles. The overall tone is dark and moody, with the central text providing a stark contrast.

THANK YOU

KANTAR

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vincent.houart@arval.be

Arval Mobility
Observatory