



MOBILITY AND FLEET BAROMETER 2024



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1

CONTEXT AND METHODOLOGY



KEY THEMES FOR ARVAL MOBILITY OBSERVATORY



1

WHAT SHORT TERM
SHIFTS ARE SHAPING THE
MARKET?



2

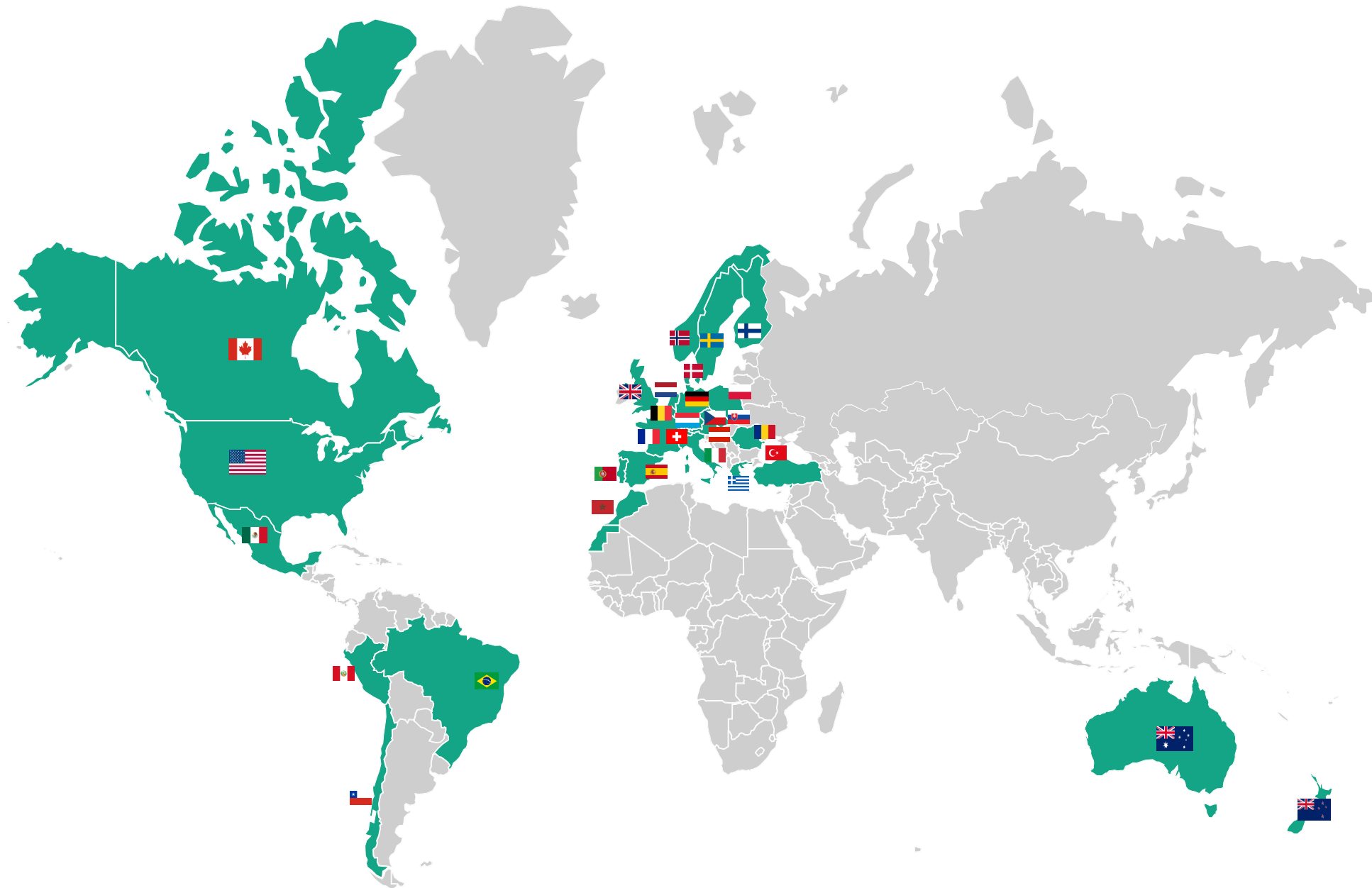
WHAT KIND OF VEHICLES
WILL THE MARKET
EXPECT IN 3 YEARS?



3

HOW DO MOBILITY
SOLUTIONS IMPACT
FLEET MANAGEMENT?

SCOPE OF THE SURVEY : 30 COUNTRIES



COMPANY SIZE SEGMENT DEFINITION

WORLD

EUROPE

OUT OF EUROPE




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



METHODOLOGY



DATA COLLECTION METHOD



FIELDWORK PERIOD



TARGET



QUOTAS

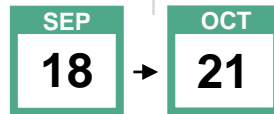


SAMPLE



DURATION OF INTERVIEW

CATI SYSTEM
(Computer Assisted Telephone Interviewing)
Recruitment by telephone



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

COMPANY SIZE & SECTOR

5854 | Europe
1650 | Americas
1101 | Rest of the world (TR,MA,AU,NZ)
8605 | Interviews in total

26
minutes on average

READING NOTES ABOUT THE REPORT

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



XX | Significantly higher than 2023 year



XX | Significantly higher than 2022 year

XX = score 2023 or 2022



XX | Significantly lower than 2023 year



XX | Significantly lower than 2022 year

XX = score 2023 or 2022

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

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

NUMBER OF INTERVIEWS CONDUCTED IN SWITZERLAND



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



Companies with Less than 10 empl.
100 INTERVIEWS



Companies with 10 - 99 empl.
60 INTERVIEWS



Companies with 100 - 499 empl.
81 INTERVIEWS



Companies with 500 empl. or more
59 INTERVIEWS

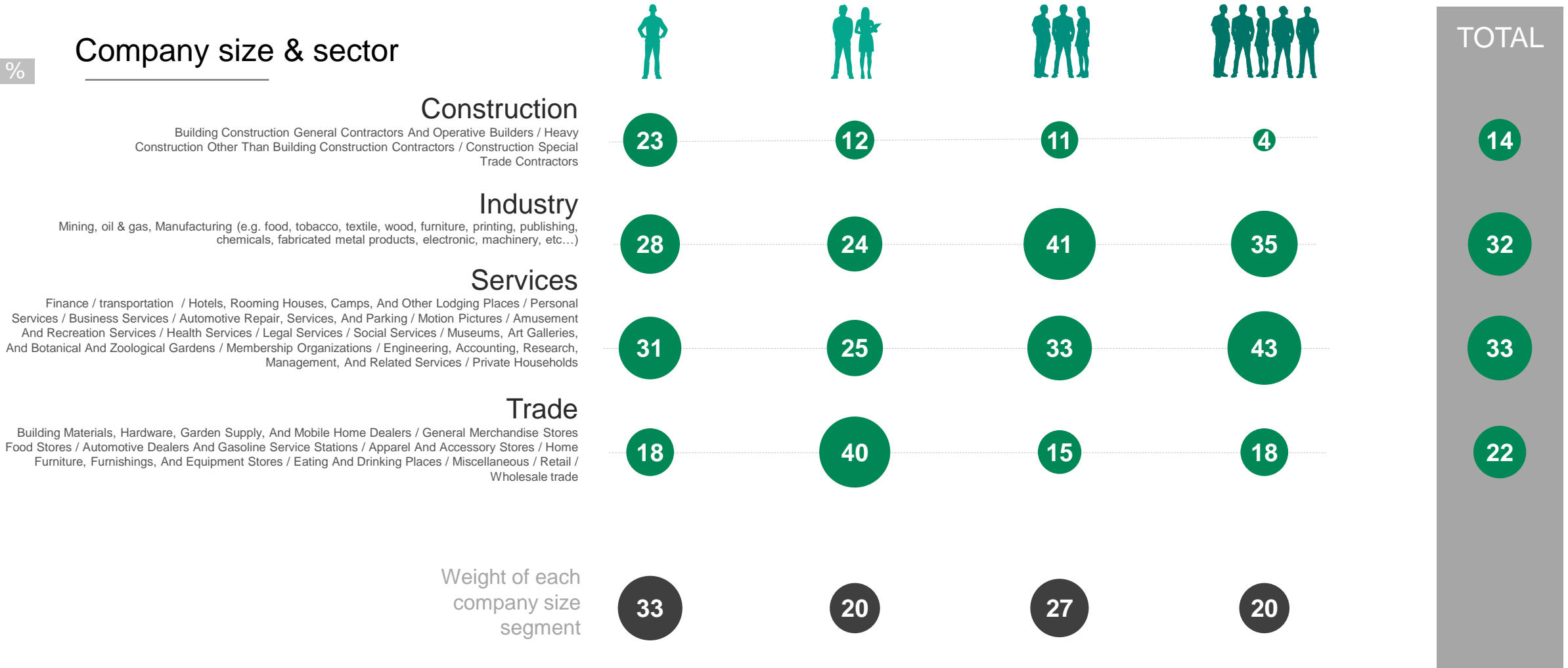


SAMPLE STRUCTURE IN SWITZERLAND



In %

Company size & sector



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

MOBILITY SOLUTIONS LIST AND DEFINITIONS



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



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



RIDE SHARING: where several employees travel in the same car to the same destination



AN APP PROVIDED BY THE COMPANY TO BOOK MOBILITY SOLUTIONS



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



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



PUBLIC TRANSPORT



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



CAR OR CASH ALLOWANCE

2

EXECUTIVE SUMMARY



INSIGHT 1: A WELL-REASONED OPTIMISM ABOUT THE FUTURE FLEET

#1

VEHICLES RENEWAL IS STILL SOMEHOW HAMPERED BY LONGER POSSESSION LENGTH

- **Swiss fleet managers are still confident about the future of their fleets**, 9 out of 10 anticipating a stability or increase within the next 3 years, similar to the European average. The pictures are quite the same whatever company sizes or types of vehicles are considered.
- **The reasons behind fleet growth expectations are stable** and rank in the same order exactly as in Europe, namely business development first, followed by HR needs (talent recruitment, employees' retainment).
- **Vehicle possessions length is stable, still above the European average**, and longer among 500+ employee's companies. LCVs are renewed later than passenger cars, especially among the same largest companies.
- **Second-hand vehicles are used by 1 out of 4 companies already** (mainly pool cars and tool cars) – quite below the European average – and a total of 8 out of 10 expect to use some in the next 3 years (in line with the European benchmark). As for current usage of second-hand vehicles, LCVs and passenger cars are equally concerned today, but growth potential is higher for passenger cars.
- **Development of homeworking has not impacted mobility policies that much to date**. 1 out of 5 companies has changed or consider changing its mobility policy (mostly in terms of mileage or models or by reducing the total number of vehicles in their fleet).
- **Swiss companies are still facing various challenges for the years to come, the #1 being implementing alternative fuel technologies**, ahead of the adaptation to restrictive public policies on petrol and diesel vehicles and mitigating the increase of total cost of ownership of the vehicles.

INSIGHT 2: INDEPENDENT CAR DEALERS DRIVE PATH TO PURCHASE

#2

BUT STILL SOME ROOM FOR GROWTH FOR OPERATING LEASING

- **Outright purchase and financial leasing are the financial methods used the most, ahead of operating leasing.** This is in line with company sizes. No major differences when looking at passenger cars and LCVs more specifically.
- **1 out of 4 companies already use or intend to use operating leasing in the next 3 years** (stable vs last year and still below the European average). Growth potential is even **more limited within the 500+ employee's companies.**
- **Direct dealer contact is the SMEs' main source of information for vehicle choice,** it has even quite reinforced since last year. Direct dealer contact has also **reinforced as the #1 source of information on funding methods.** To note the growing importance of online car magazines for information on the vehicle choice, and of comparison websites for information on the funding methods.
- **Independent car dealers drive path to purchase and end as the main subscription channel** in Switzerland, above manufacturers dealerships, internet and leasing companies – the latter showing some room for improvement in terms of partnership with SMEs then.
- Credit card is the parking payment solution used the most.

INSIGHT 3: ALTERNATIVE FUEL TECHNOLOGIES ADOPTION POTENTIAL IS HIGH

#3

100% BEV SHOWING THE HIGHEST POTENTIAL FOR PASSENGER CARS

- **Alternative fuel technology (PHEV, HEV or 100% BEV) have been implemented by half of the companies** – this is stable and somehow below the European average. Overall, **potential is higher though, 8 out of 10 intending to use one** within the next 3 years.
- **100% BEV shows the highest potential and the only one increasing**, especially among the 1/99 employee's companies.
- **100% BEV is still marginal among LCVs fleets**, being used by less than 1 out of 10 companies and showing a weakening adoption potential. Fuel Cell is even more confidential.
- **Adoption of alternative fuel technologies for passenger cars is driven by the lower environmental impact first**, ahead of CSR policies and of the reduced fuel expenses – same picture as in overall Europe. **The picture is different regarding LCVs, alternative fuel technologies adoption being driven by companies' image first**, far above the European average.
- **But in the next 3 years, expectations are positive** : alternative fuel technologies should represent almost half of passenger cars fleets, and around 40% for LCVs fleets.
- At last, **only a few companies are eligible to an ESG public regulatory reporting today** but almost 2 more out of 5 will be eligible in the next 2 years. Employees mobility is of high importance for half of them.

#4

... AND IS CHALLENGED BY CORPORATE CAR SHARING AND CAR/CASH ALLOWANCE THOUGH

- **8 out of 10 companies have adopted mobility solutions** – a proportion stable and on par with the European average.
- **The solution adopted the most often is ride sharing.** It is also the one benefiting from the highest growth potential. Public transport, car/cash allowance and corporate car sharing are somehow distanced, tied #2 and showing the same level of development potential too.
- The **main drivers of the adoption of mobility solutions** are HR related needs (talent recruitment, employees' retainment), CSR policies and company attractiveness – in line with the European picture.
- Overall, **mobility solutions are perceived more as add-ons to the vehicle fleets**, their adoption showing a limited impact on the sizes of the latter.
- **Only 1 out of 10 companies have adopted mobility budget**, which remains marginal then. Its adoption is driven by mobility costs lowering and for supporting the employees in their wish for more options and flexibility in relation to mobility.

#5

WITH A SLIGHT ADVANTAGE FOR PASSENGER CARS OVER LCVS REGARDING THE DATA USAGE

- **Usage of connected vehicles is stable in Switzerland and rather in line with the European picture**, with 1 out of 3 Swiss companies using telematics tools for their fleet (somehow below the European average) and no major differences between passenger cars and LCVs.
- **As for passenger cars, almost 1 out of 5 use the data coming from the vehicle box thanks to a telematics platform** – somehow above the average usage rate among LCVs.

3

WHAT ARE THE MAIN CHARACTERISTICS OF THE FLEETS?



A WELL-REASONED OPTIMISM ABOUT THE FUTURE FLEETS SIZES, WHOSE RENEWAL IS STILL SOMEHOW HAMPERED BY LONGER POSSESSION LENGTH

1

- In line with last years' trend, Swiss companies remain confident about the future of their fleets, **92% anticipating a stability or increase within the next 3 years**, like the European average. The pictures are quite the same whatever company sizes or types of vehicles are considered.

Vehicle possessions length is stable, still above the European average (6,4 years vs 5,5 years), and longer among 500+ employee's companies (7,3 years). LCVs are renewed later than passenger cars (6,7 years vs 6,2 years), especially among the same largest companies (7,7 years).

2

- Just like last years, the reasons behind **fleet growth expectations rank in the same order as Europe**, namely business development first, followed by HR needs (talent recruitment, employees' retainment).

3

- **1 out of 4 companies use second-hand vehicles already** (mainly pool cars and tool cars) – quite below the 41% European average – and a total of **80% expect to use some in the next 3 years** (in line with the European benchmark). As for current usage of second-hand vehicles, LCVs and passenger cars are equally concerned today, but growth potential is higher for passenger cars.

4

The impact of the development of homeworking is still limited. 1 out of 5 companies has changed or consider changing its mobility policy (mostly in terms of mileage or models or by reducing the total number of vehicles in their fleet).

Swiss companies are still facing various challenges for the years to come, the #1 being implementing alternative fuel technologies, ahead of the adaptation to restrictive public policies on petrol and diesel vehicles and mitigating the increase of total cost of ownership of the vehicles.

FLEET PROFILE



MOBILITY POLICY

ADAPTATION

COINCIDING WITH

HOMEWORKING



21%

changed the policy or consider changing



15%



FLEET POSSESSION LENGTH

6.4

years



5.5

years



ANTICIPATED FLEET EVOLUTION

(% will increase or remain stable)

92%



91%

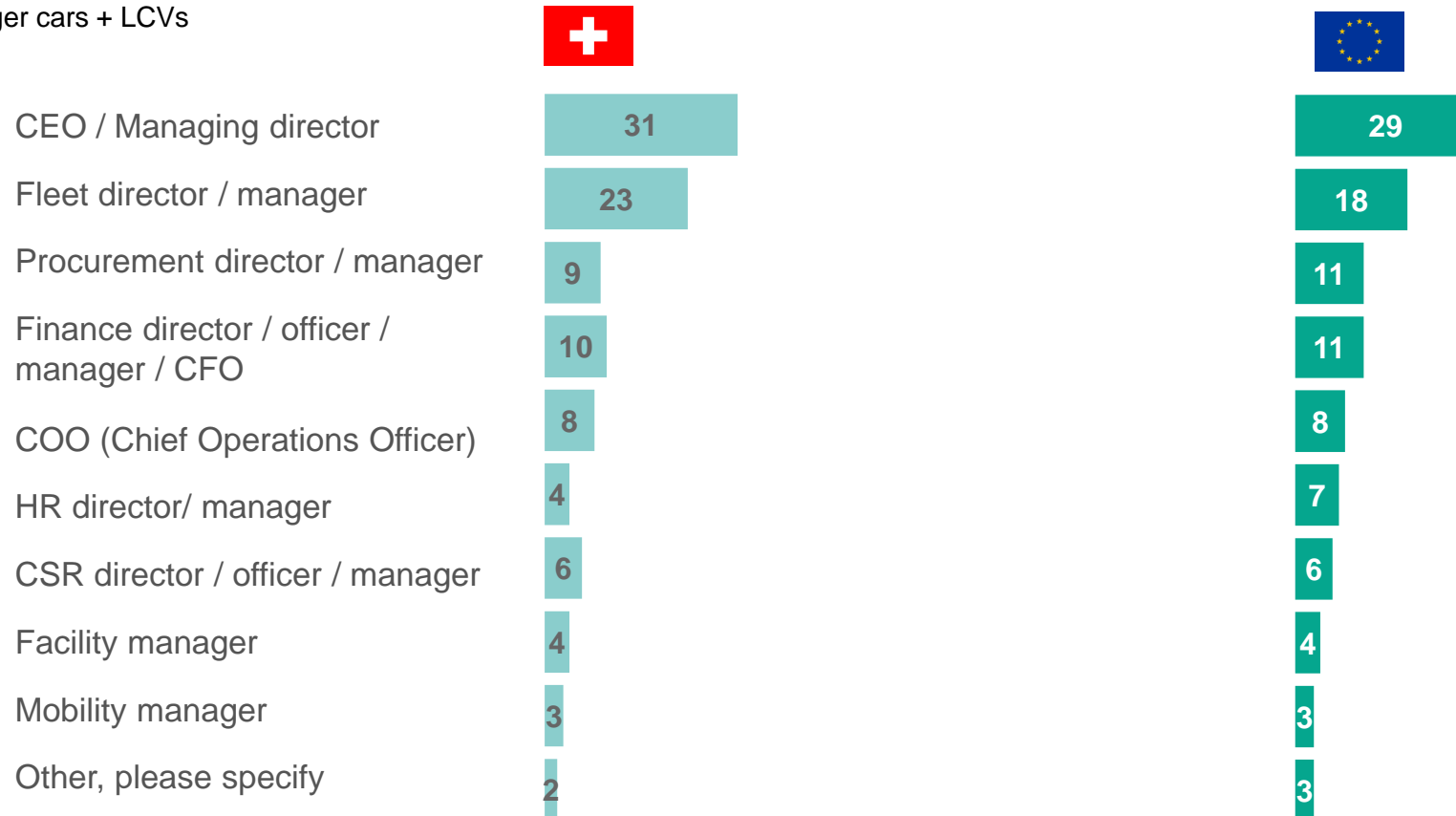


RESPONDENTS POSITION WITHIN THE COMPANY

In %



Passenger cars + LCVs



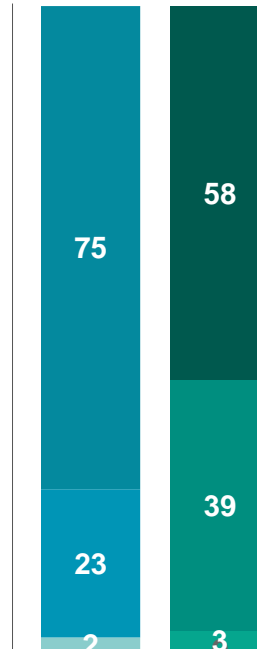
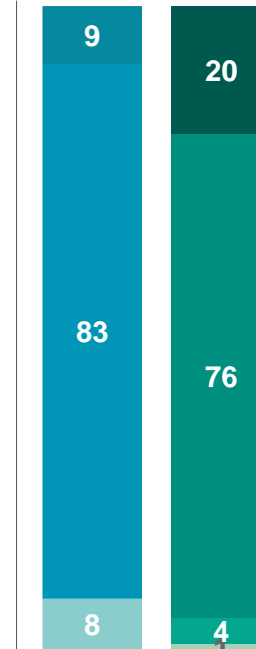
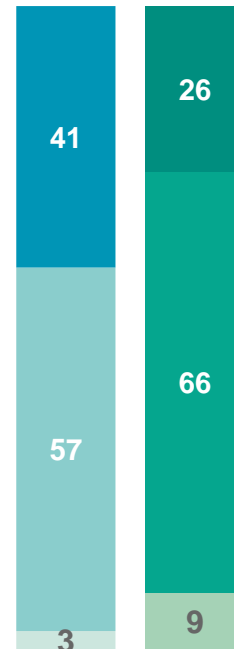
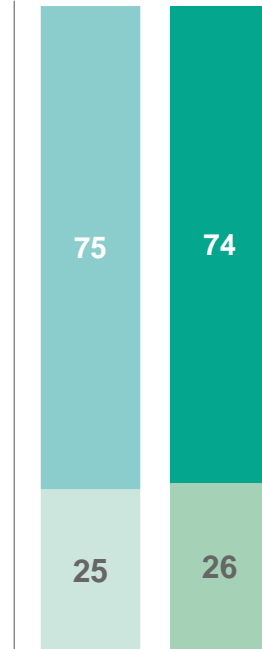
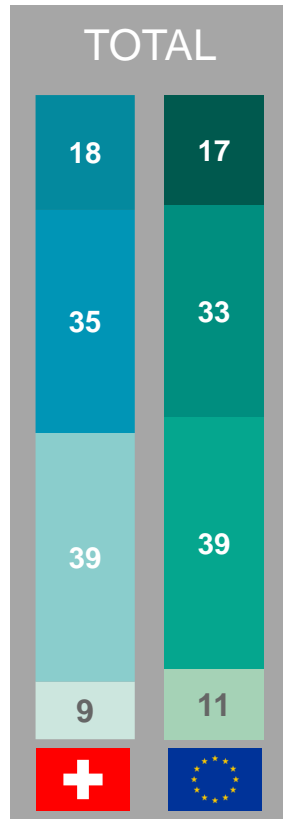
NUMBER OF VEHICLES IN FLEET

In %



Passenger cars + LCVs

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

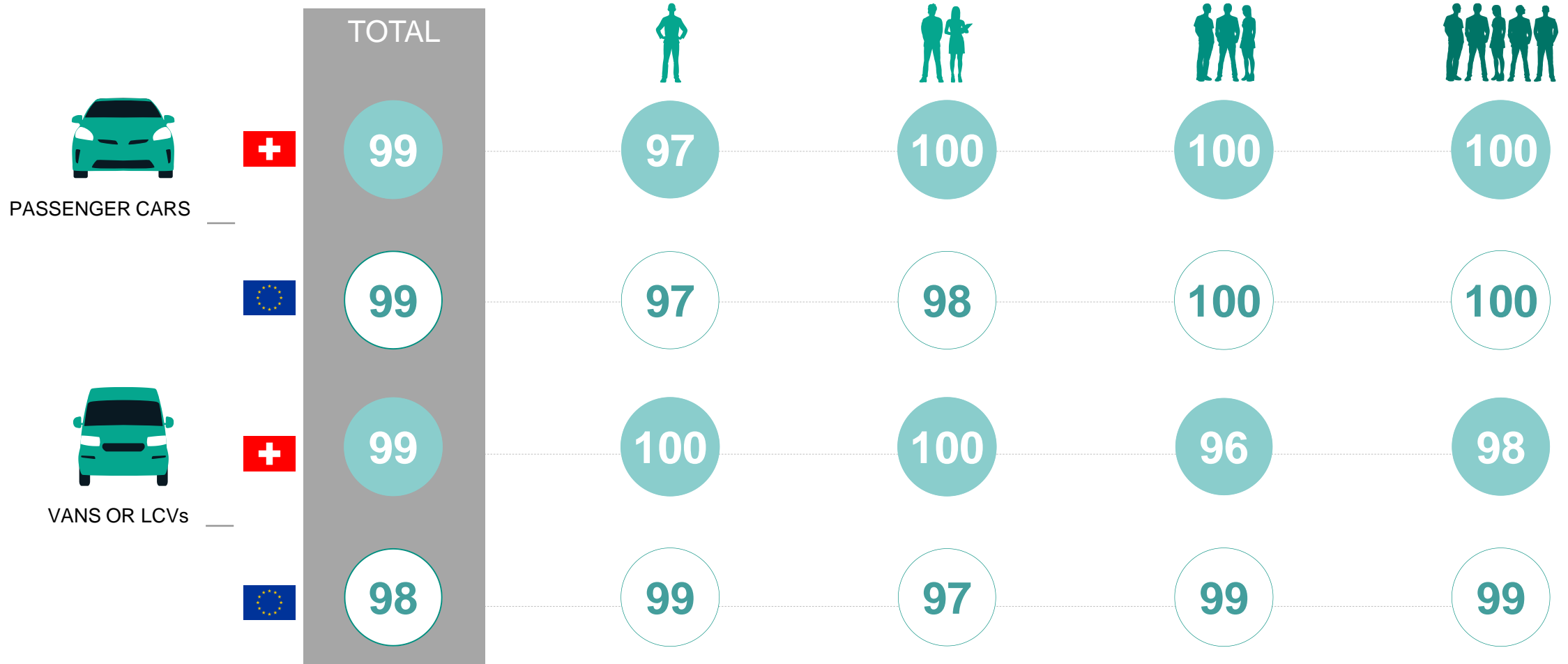


Can you please tell us the total number of vehicles of less than 3.5 tons in your fleet?
Basis: companies with corporate vehicles = 100%

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

(among companies with at least one vehicle in fleet)

In %



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

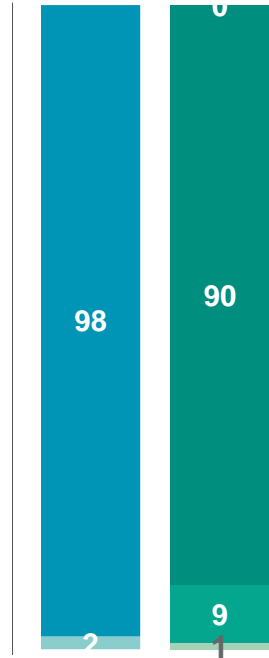
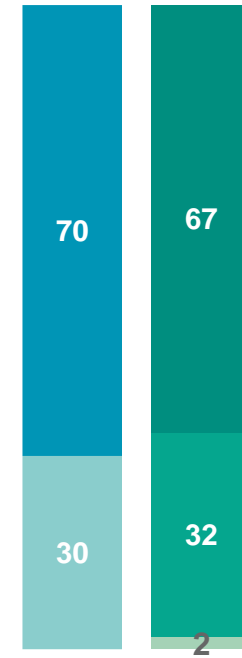
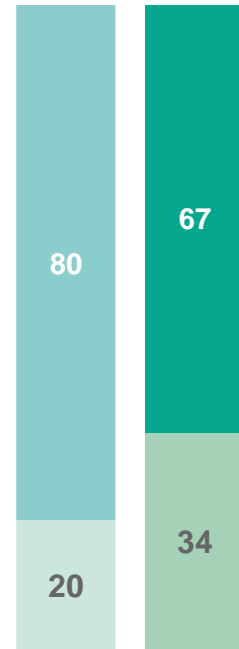
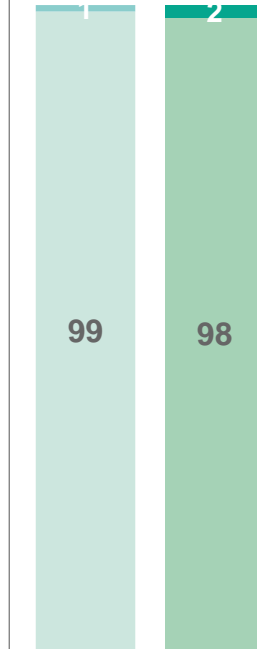
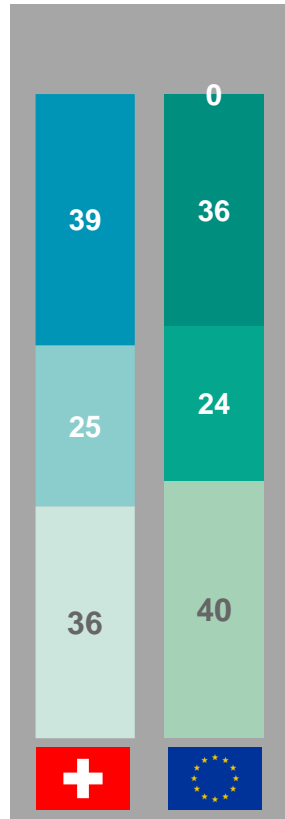
NUMBER OF PASSENGER CARS IN FLEET

In %



Passenger cars

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



And can you please tell us the total number of cars in your fleet?
Basis: companies with passenger cars

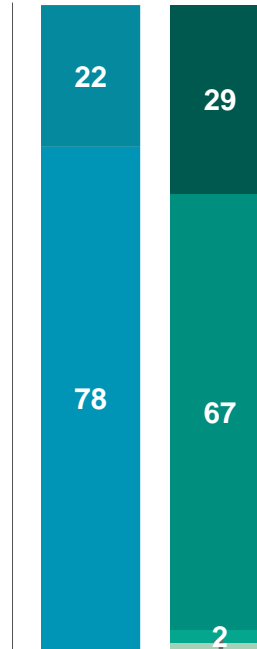
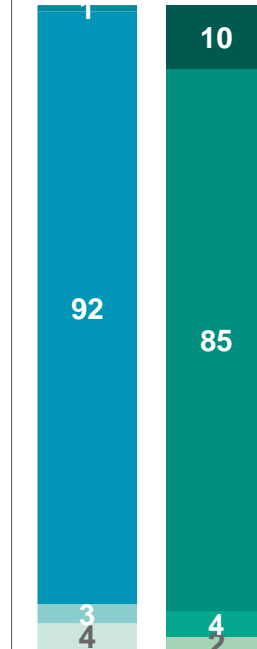
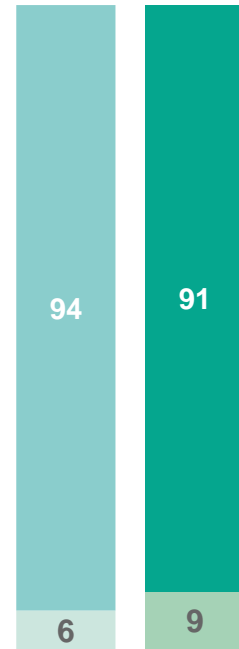
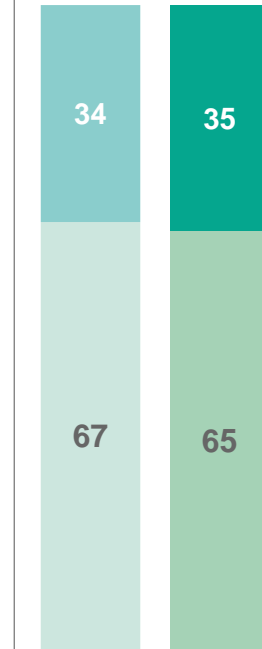
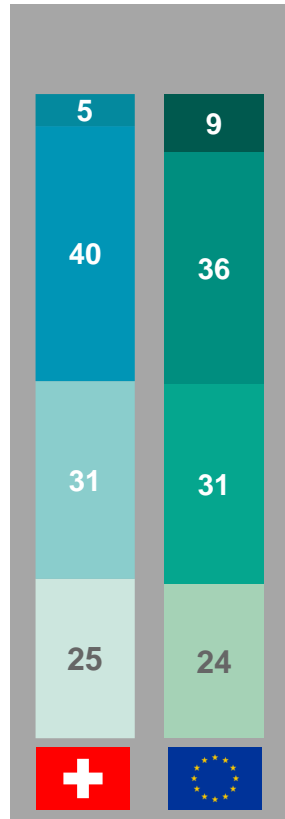
NUMBER OF LCVS IN FLEET

In %



LCVs

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



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

VEHICLES POSSESSION LENGTH



Passenger cars + LCVs

AVERAGE IN YEARS



6.4



5.5

TOTAL



6.3



6.5



6



7.3

5.4

5.6

5.5

5.6

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

PASSENGER CARS POSSESSION LENGTH



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

LCVS POSSESSION LENGTH



LCVs

AVERAGE IN YEARS



6.7



5.7

TOTAL



6.4

5.6

5.8



6.6

5.8



6.2

5.7



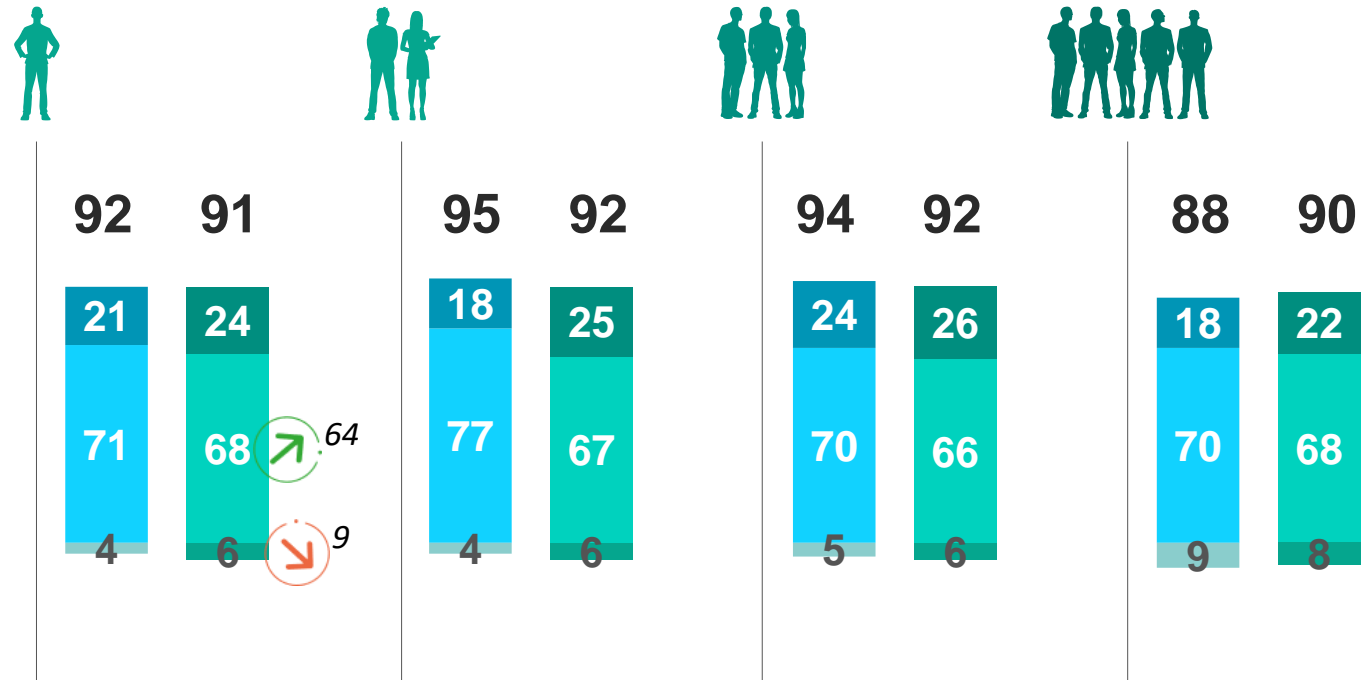
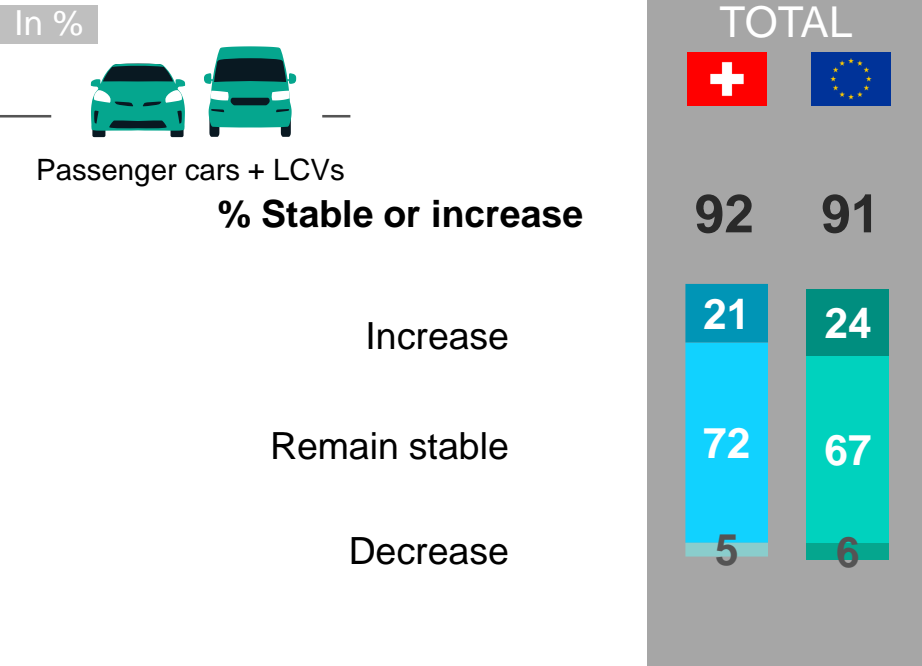
7.7

5.8

FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Switzerland, 92% of the companies declare that in the next 3 years their company fleet will remain stable or increase.



BALANCE in pts (INCREASE ⊖ DECREASE)



2024	+15	+18	+18	+17	+15	+19	+19	+20	+8	+15
2023	+11	+16	+10	+15	+8	+16	+11	+17	+15	+16
2022	+13	+18	+13	+19	+6	+17	+13	+17	+19	+17

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

PASSENGER CAR FLEET GROWTH POTENTIAL

In %



Passenger cars

% Stable or increase

Increase

Remain stable

Decrease

TOTAL



88 89

21 27

67 62

10 9

HOW TO READ THE RESULTS ?

In Switzerland, 88% of the companies declare that in the next 3 years the total number of passenger cars will remain stable or increase.



86 88

20 26

66 62

12 9

89 91

17 28 ↑ 23

73 63 ↓ 68

10 7

89 90

24 28

65 62

10 9

90 88

22 26 ↓ 36

68 63 ↑ 48

9 10 ↓ 13

BALANCE in pts (INCREASE ⊖ DECREASE)

2024	+10	+18	+8	+17	+7	+21	+14	+19	+14	+16
2023	+12	+17	+16	+16	+8	+15	+11	+17	+11	+22

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

LCVS FLEET GROWTH POTENTIAL

In %



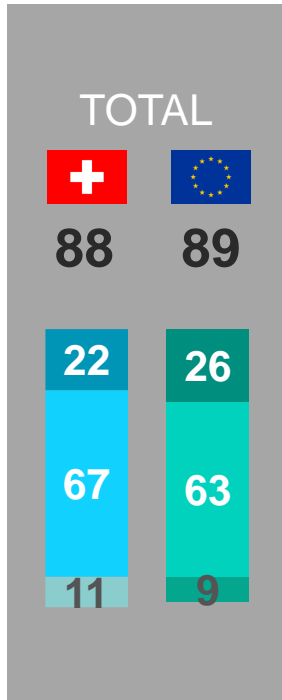
LCVs

% Stable or increase

Increase

Remain stable

Decrease



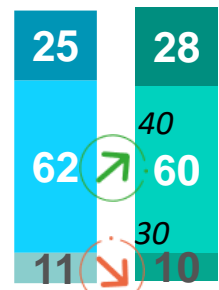
HOW TO READ THE RESULTS ?

In Switzerland, 88% of the companies declare that in the next 3 years the total number of LCVs will remain stable or increase.

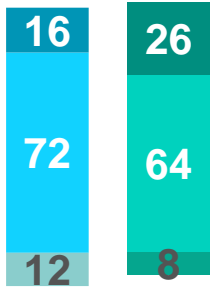


↑ 68

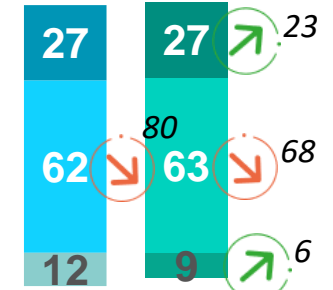
88 88



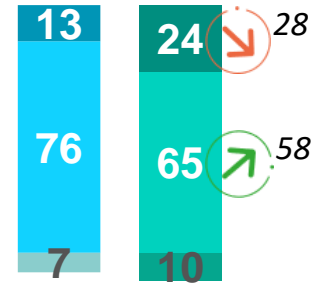
88 90



88 89



89 89

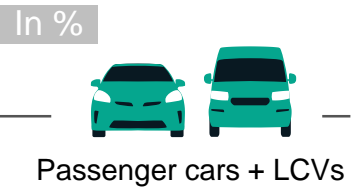


BALANCE in pts (INCREASE ⊖ DECREASE)

2024	+11	+17	+14	+18	+5	+18	+15	+18	+6	+14
2023	+9	+17	-2	+19	+11	+15	+12	+17	+15	+17

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

REASON FOR FUTURE FLEET INCREASE



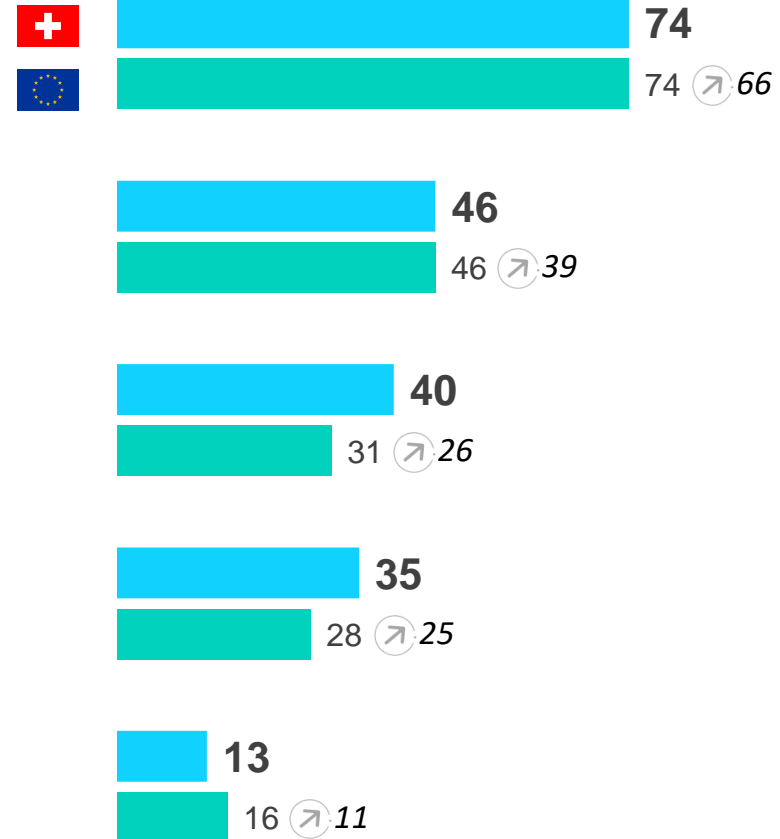
Because your company is growing or developing a new activity that requires company vehicles

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

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

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

Because of tax decreases



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

SECOND-HAND VEHICLES

In %



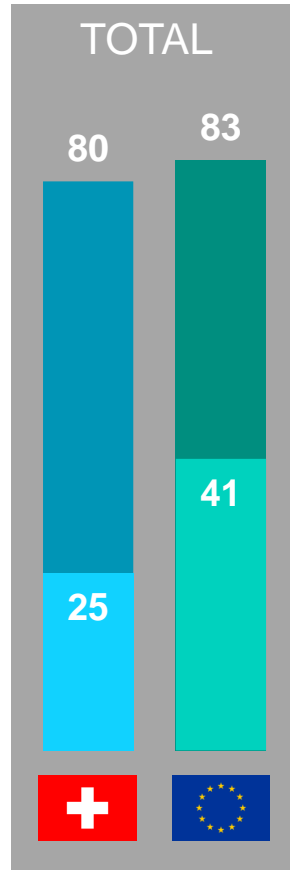
Passenger cars + LCVs



ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

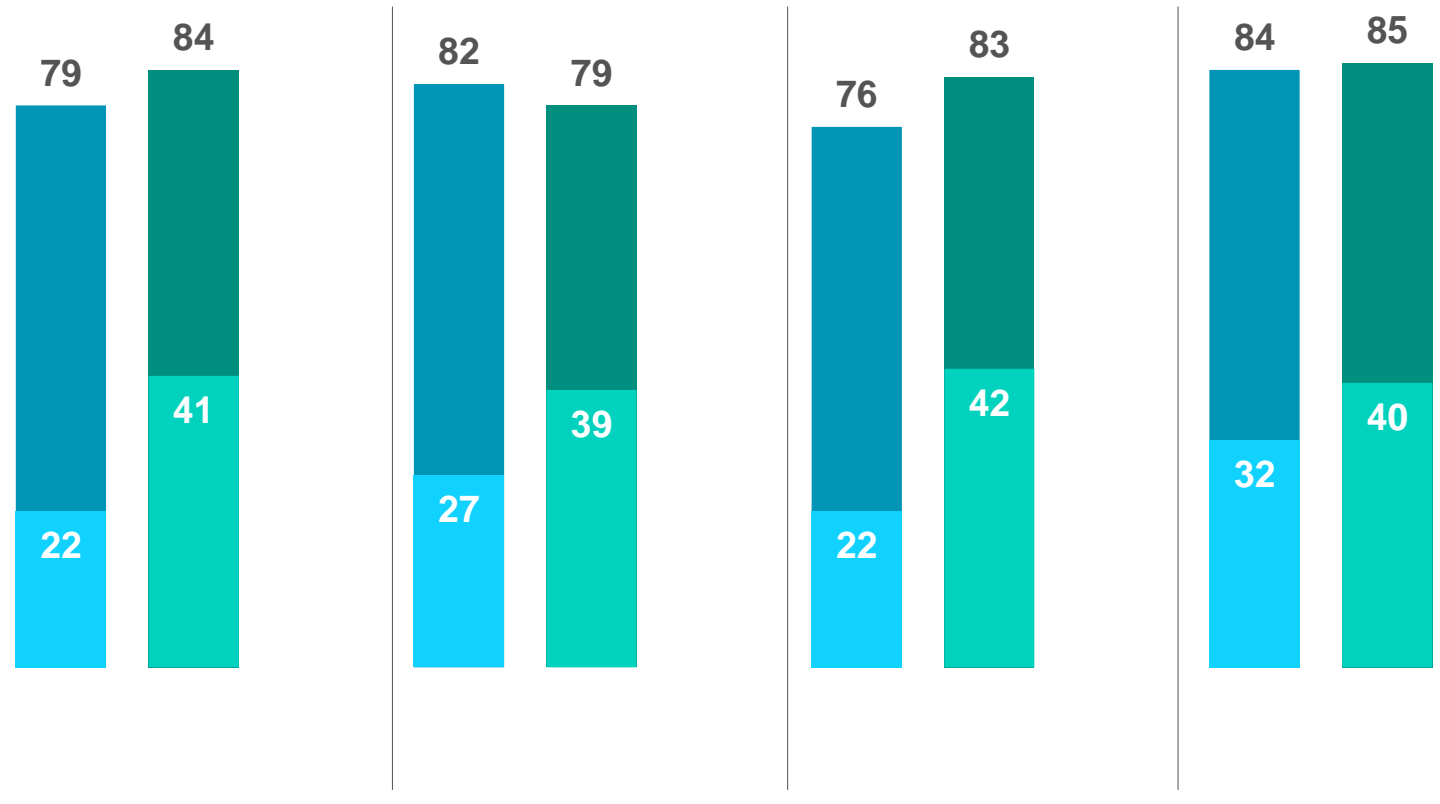


ALREADY USING



HOW TO READ THE RESULTS ?

In Switzerland, 80% of the companies are already using or consider to use second-hand vehicles in the next 3 years. 25% of the companies are currently using some.



New question added in 2024

Do you have used/second-hand vehicles in your fleet or do you consider having some in the next three years?

Basis: companies with corporate vehicles = 100%

SECOND-HAND VEHICLES FOR PASSENGER CAR FLEET

HOW TO READ THE RESULTS ?

In Switzerland, 61% of the companies are already using or consider to use second-hand vehicles in the next 3 years. 13% of the companies are currently using some.

In %



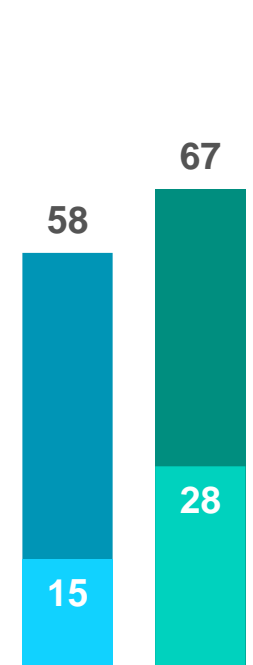
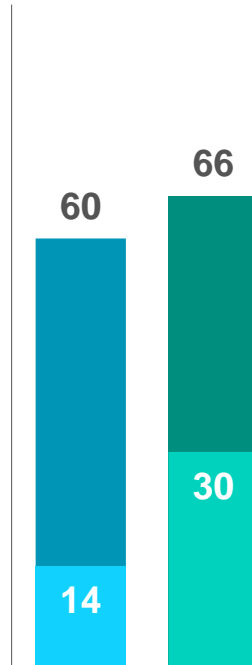
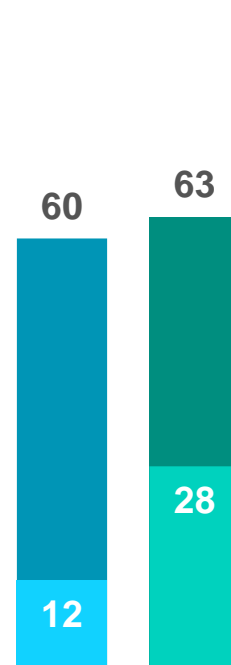
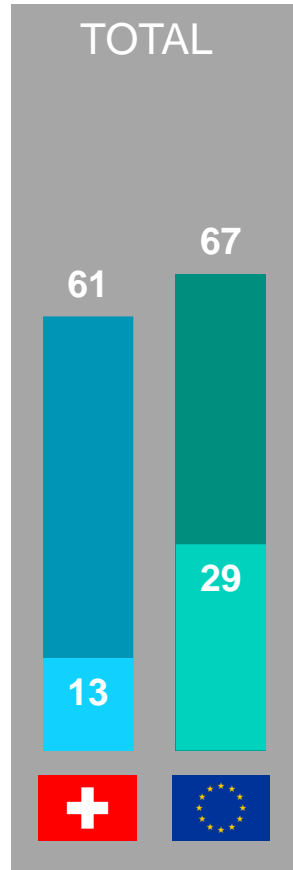
Passenger cars



ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS



ALREADY USING



New question added in 2024

Do you have used/second-hand vehicles in your fleet or do you consider having some in the next three years?

Basis: companies with passenger cars

SECOND-HAND VEHICLES FOR LCVS CAR FLEET

HOW TO READ THE RESULTS ?

In Switzerland, 49% of the companies are already using or consider to use second-hand vehicles in the next 3 years. 13% of the companies are currently using some.

In %



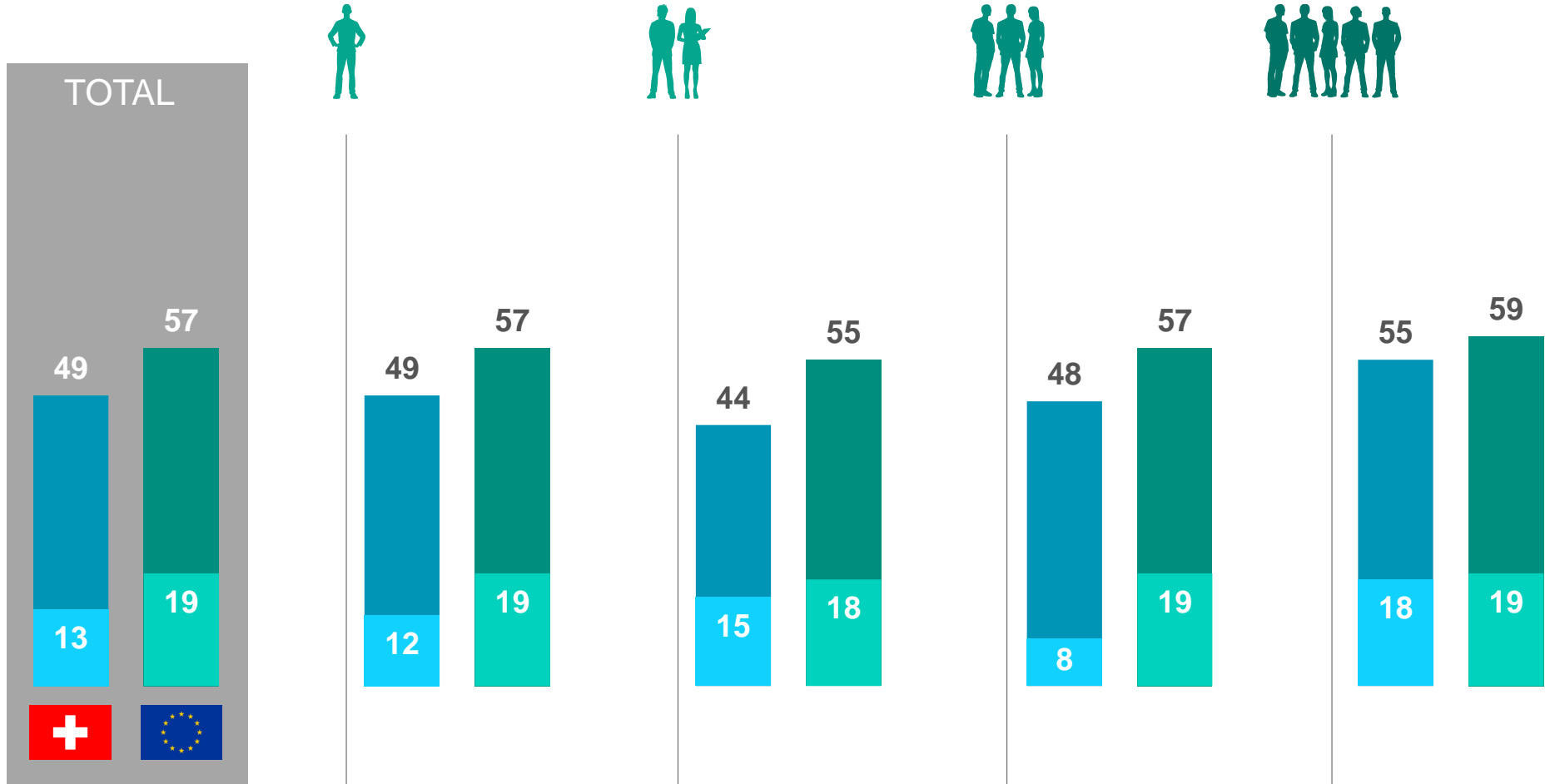
LCVs



ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS



ALREADY USING



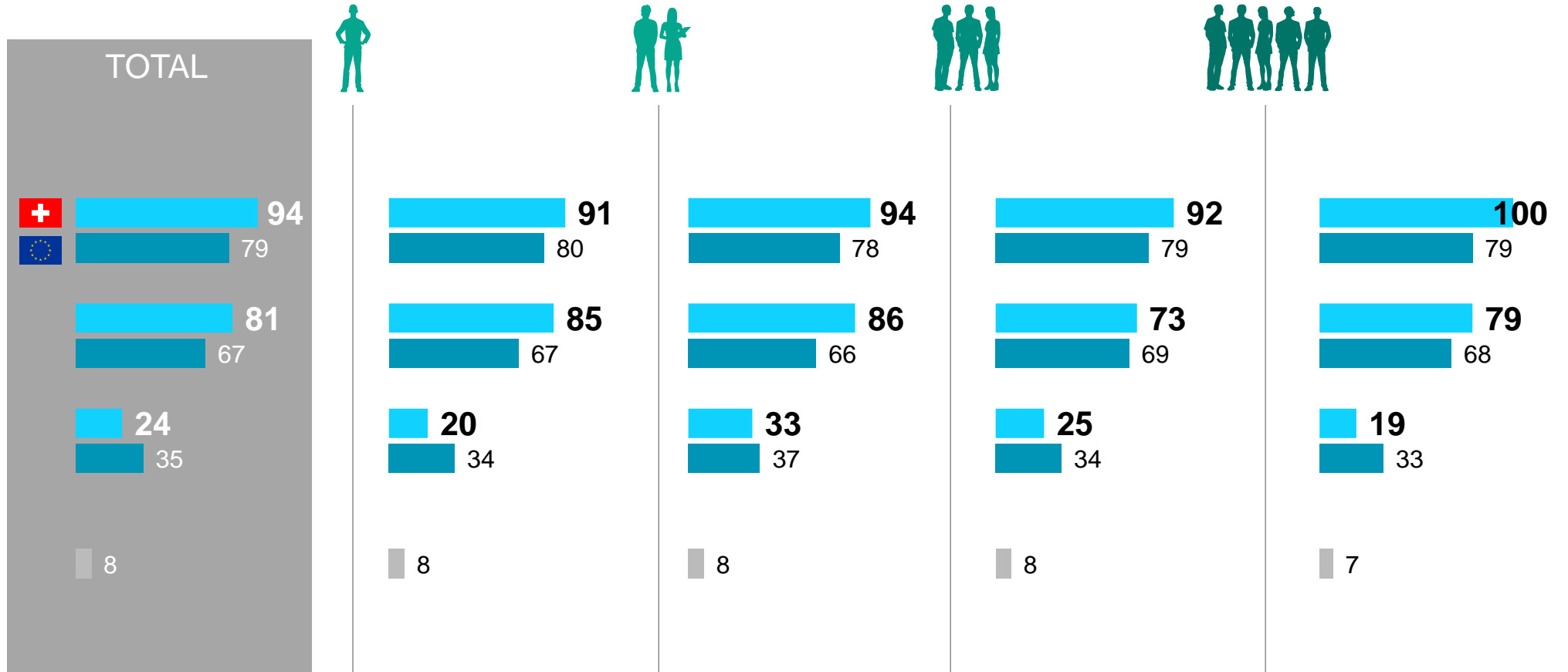
New question added in 2024

Do you have used/second-hand vehicles in your fleet or do you consider having some in the next three years?

Basis: companies with LCVS

TYPE OF USE OF USED / SECOND-HAND PASSENGER CARS

In %

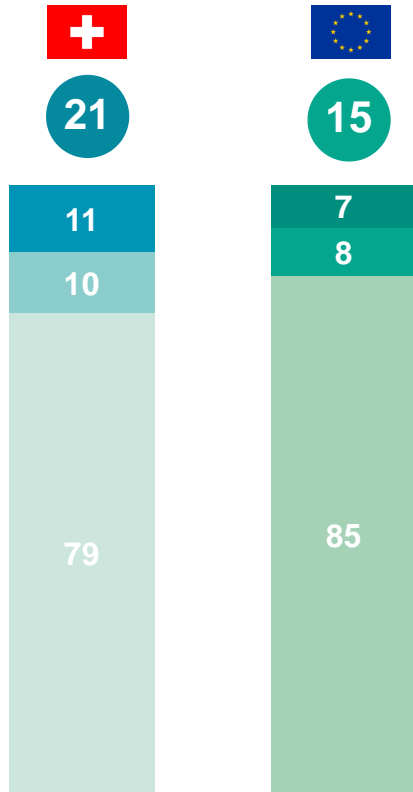


MOBILITY POLICY ADAPTATION COINCIDING WITH HOMEWORKING

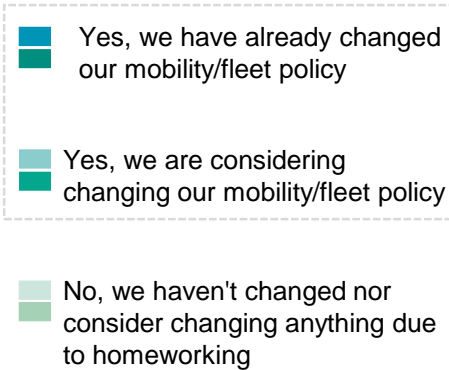
In %



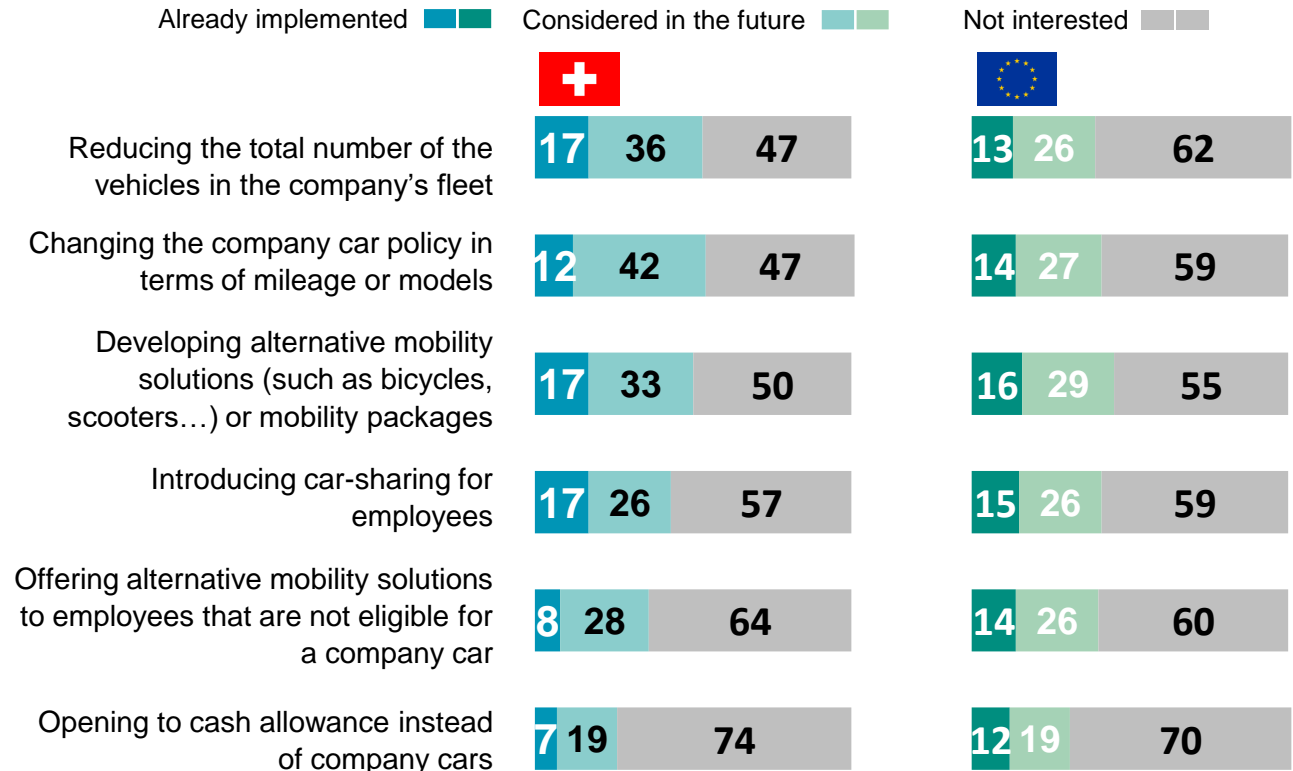
Passenger cars + LCVs



NET CHANGED THE POLICY OR CONSIDER CHANGING



HOW TO READ THE RESULTS ?
 In Switzerland, among the companies that changed or consider changing their mobility policy, 17% have already reduced the total number of the vehicles in the company's fleet.



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

Basis: companies with corporate vehicles = 100%

With regards to the development of homeworking, have you changed, or do you consider changing your mobility/fleet policy? And among the following changes, can you please select those you have implemented or consider implementing with regards to the development of homeworking?

Question asked to respondents that are aware of mobility solutions

AVERAGE ANNUAL MILEAGE PER VEHICLE

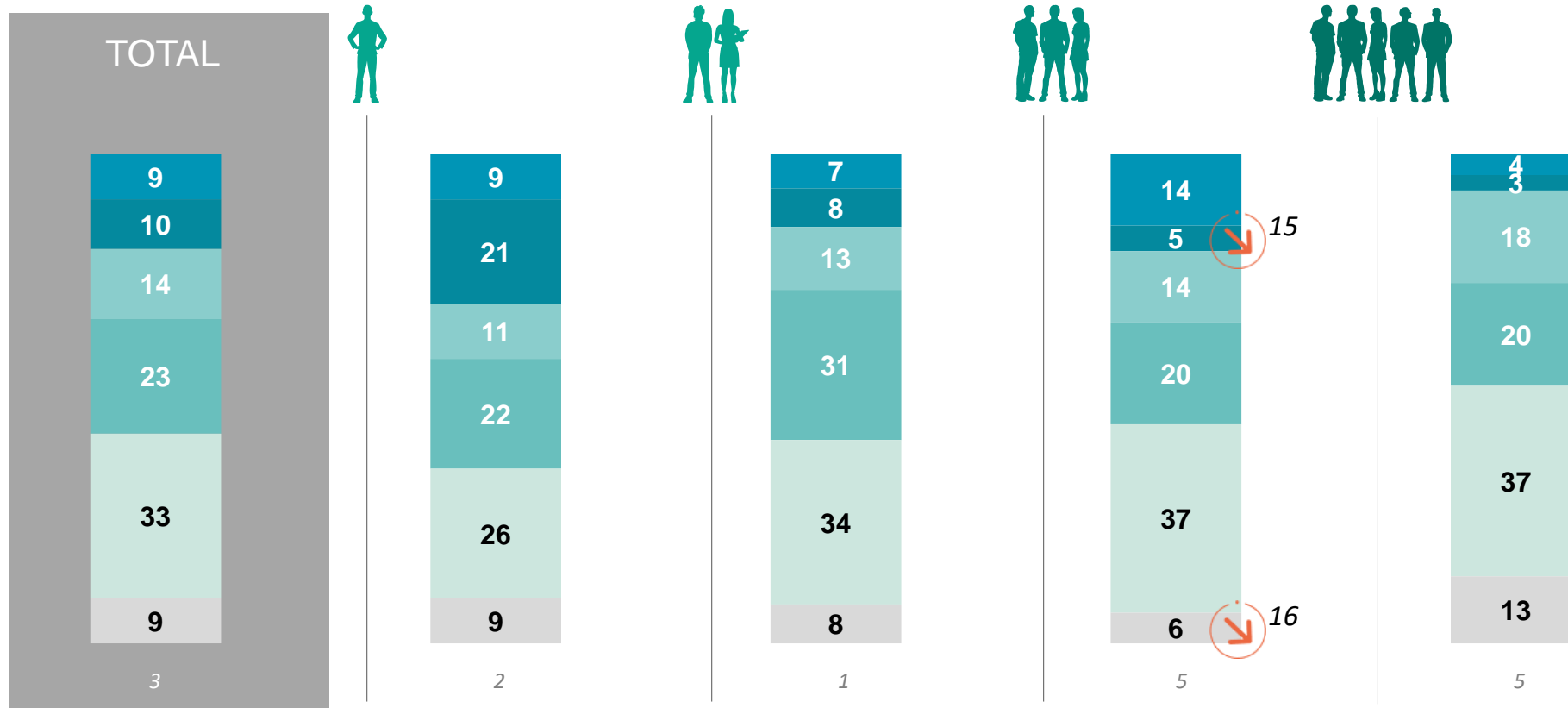
In %



Passenger cars + LCVs

- More than 50k
- 41k-50k
- 31k-40k
- 21k-30k
- 10k-20k
- Less than 10k

Don't know



What is the average annual mileage per vehicle in your fleet?
Basis: companies with corporate vehicles = 100%

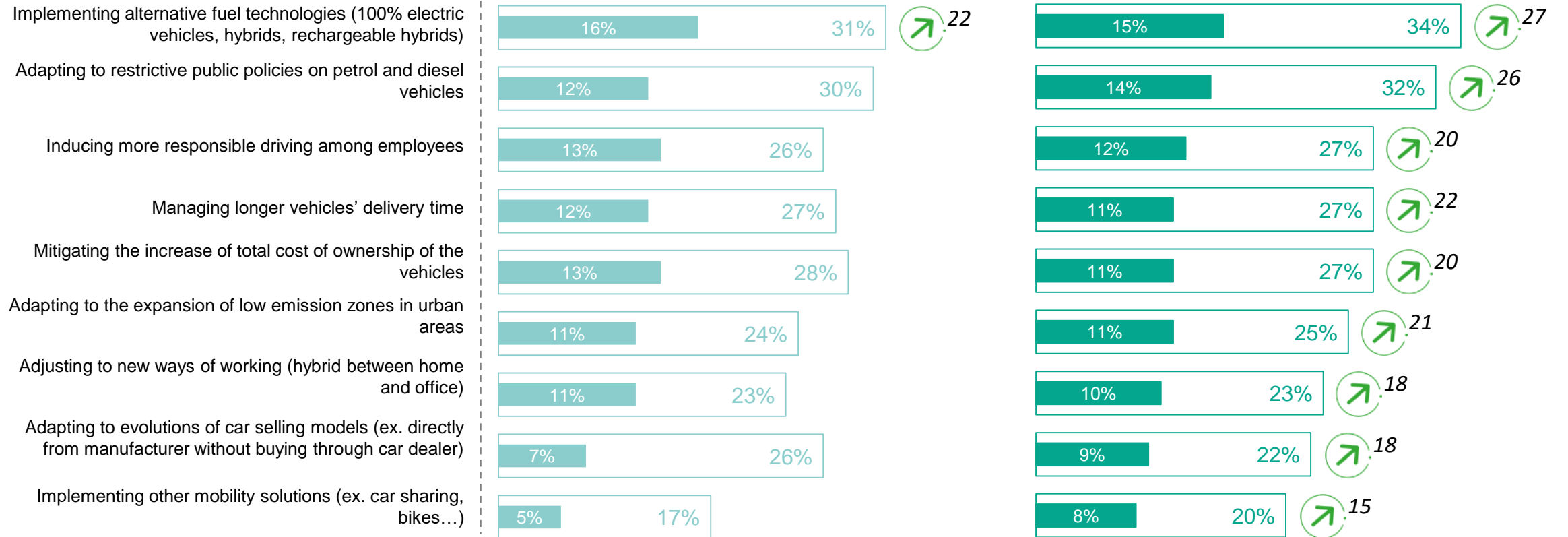
MOST IMPORTANT CHALLENGES EXPECTED

In %



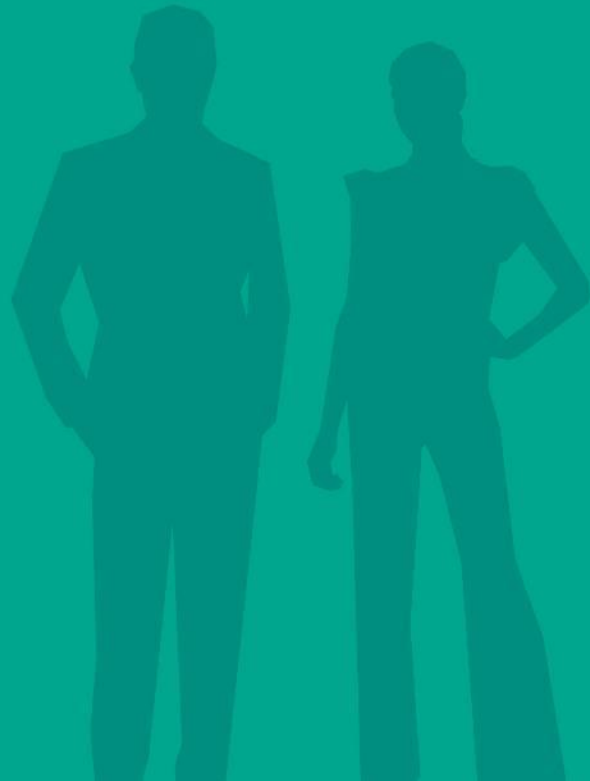
Passenger cars + LCVs

Nb 1 challenge
 Top 3 challenges



4

HOW ARE COMPANIES FINANCING THEIR FLEET?



INDEPENDENT CAR DEALERS DRIVE PATH TO PURCHASE BUT STILL SOME ROOM FOR GROWTH FOR OPERATING LEASING

1

- **Operating leasing is the main method used by 27% of the companies and comes #3 behind outright purchase and financial leasing (31% for both). No major differences when looking at passenger cars and LCVs more specifically.**

Growth potential of operating leasing is stable and still more limited in Switzerland than in Europe overall. 23% already use or intend to use this financial method in the next 3 years (vs 35% for the European average). Growth potential is even more limited within the 500+ employee's companies (16%).

2

- **SMEs' main source of information for vehicle choice is direct dealer contact, quite reinforced since last year (63%, +15 pts). Direct dealer contact has also reinforced as the #1 source of information on funding methods (65%, +15 pts). To note the growing importance of online car magazines for info on the vehicle choice, and of comparison websites for info on the funding methods.**

Independent car dealers drive path to purchase and end as the main subscription channel in Switzerland, above manufacturers dealerships, internet and leasing companies – the latter showing some room for improvement in terms of partnership with SMEs then.

3

- **At last, credit card is the parking payment solution used the most (52%).**

FINANCING



OUTRIGHT PURCHASE

31%



CREDIT

8%



OPERATING LEASING

27%



FINANCIAL LEASING

31%



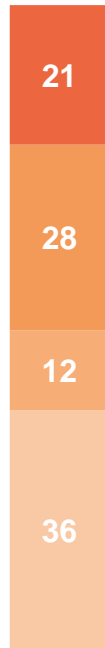
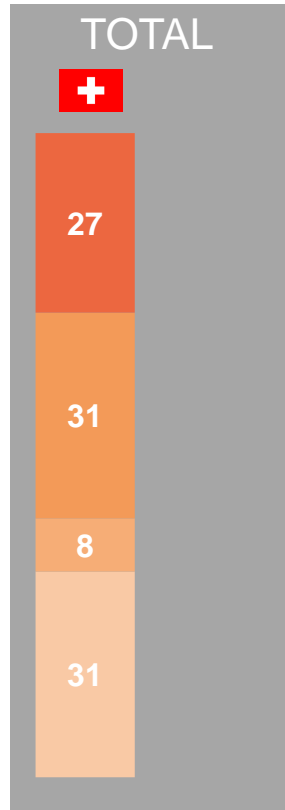
MAIN FLEET FINANCING METHOD

In %



Passenger cars + LCVs

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



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

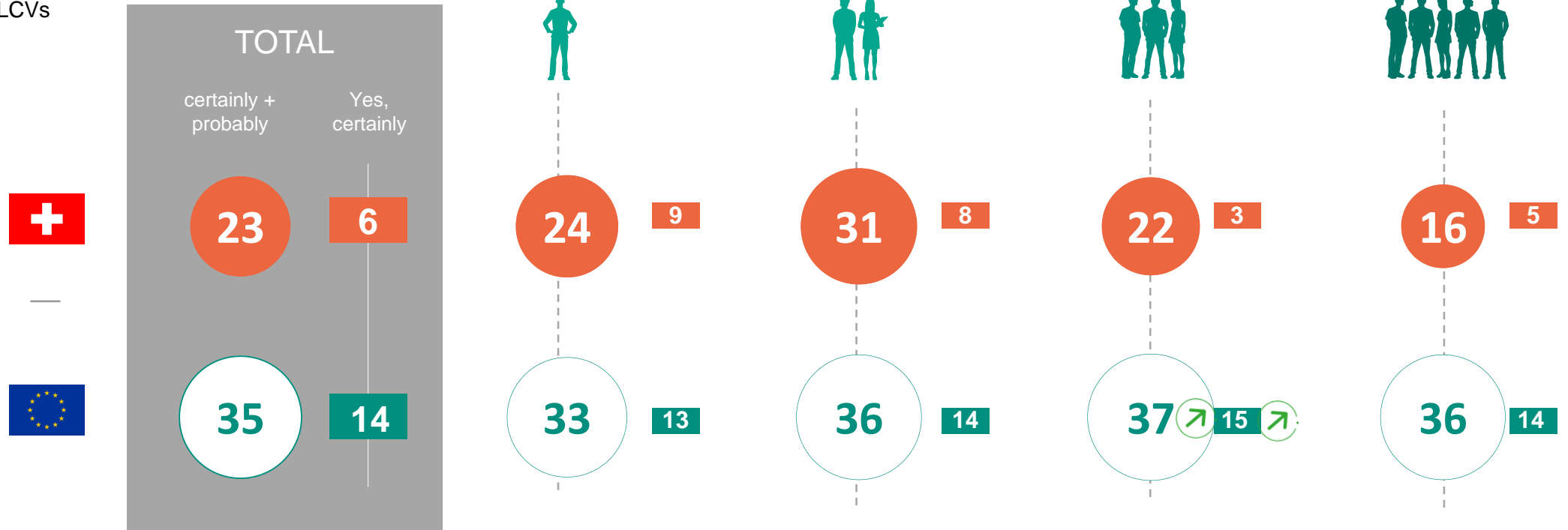
INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATING LEASING

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

In %



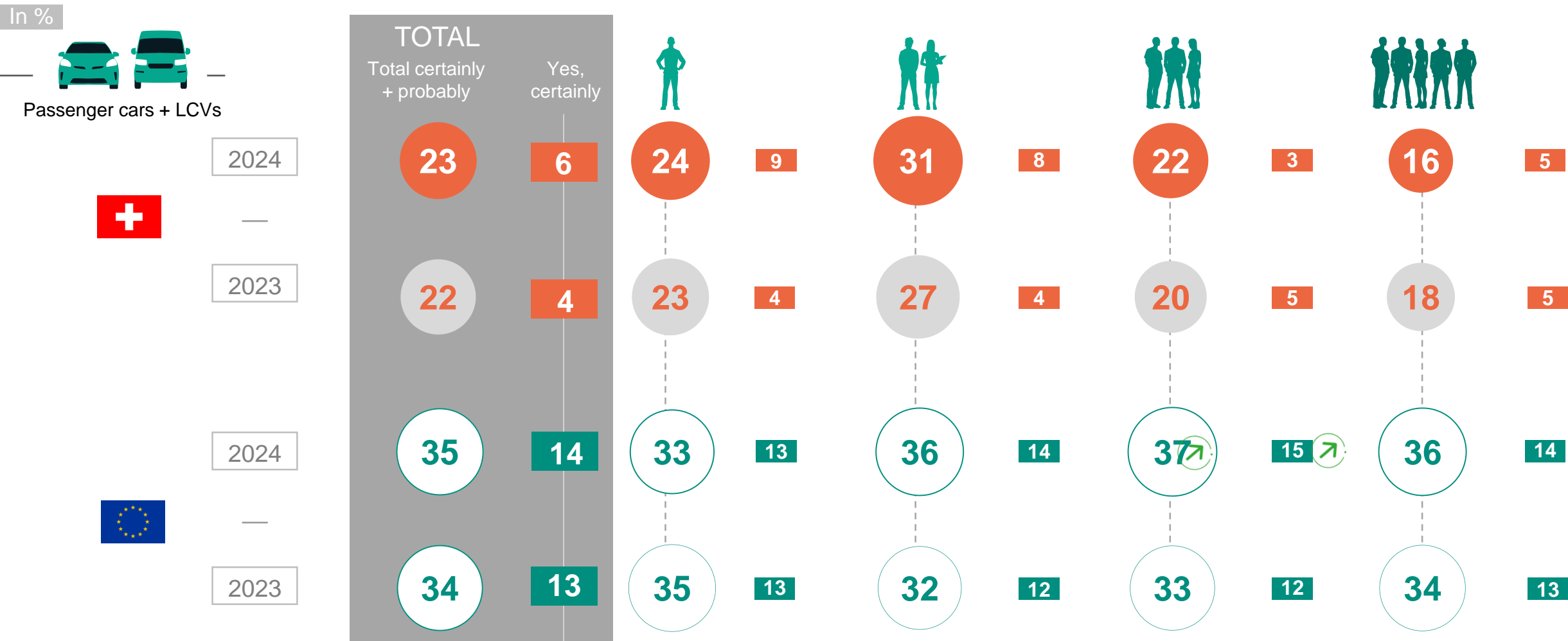
Passenger cars + LCVs



*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%*

INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATING LEASING

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



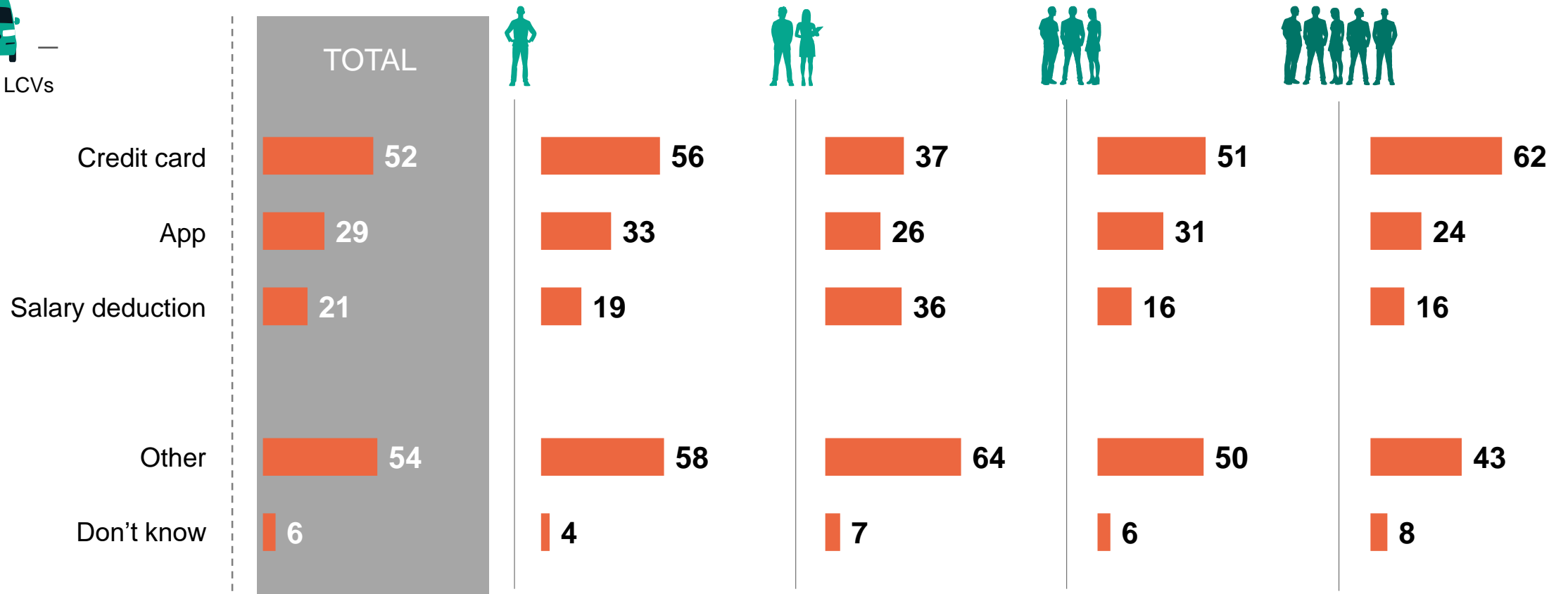
*In the next three years do you intend to introduce or increase use of Operating Lease to finance your corporate fleet?
Basis: companies with corporate vehicles = 100%*

PARKING PAYMENT SOLUTIONS

In %

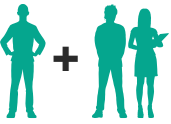


Passenger cars + LCVs



How do your employees pay for the parking of their company car?
Basis: companies with corporate vehicles = 100%

MAIN SOURCE OF INFORMATION FOR VEHICLE CHOICE



Focus 1 to 99

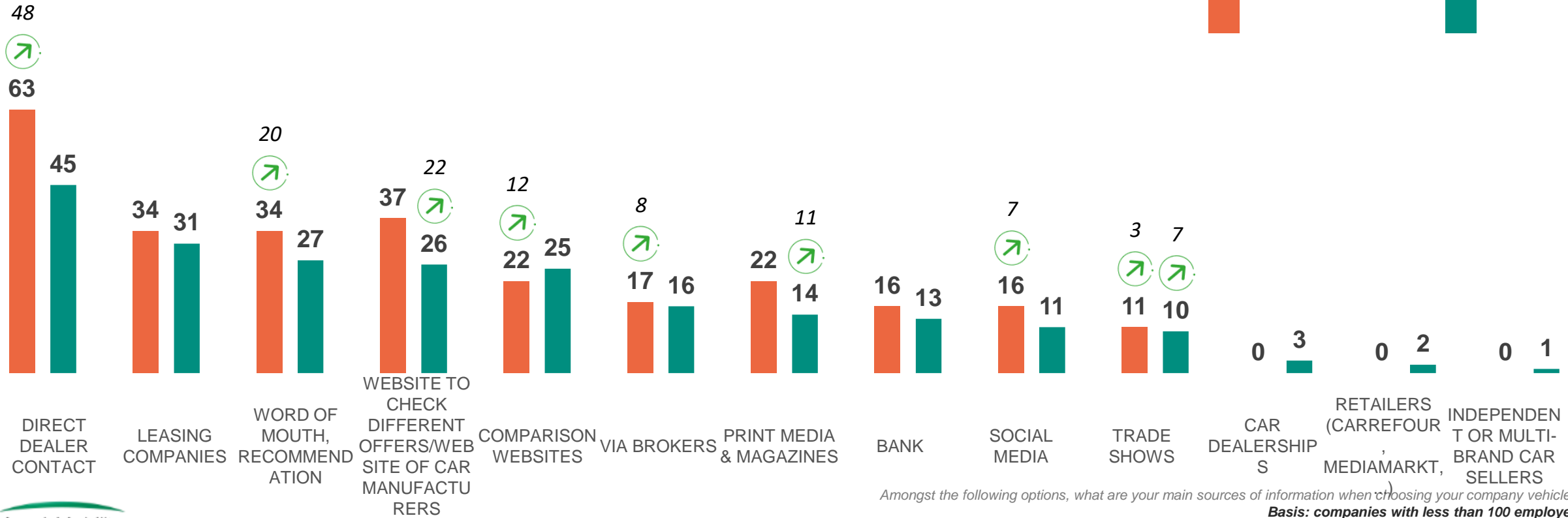
In %



Passenger cars + LCVs



*BE, FR, UK, PL, CH, CZ, IT



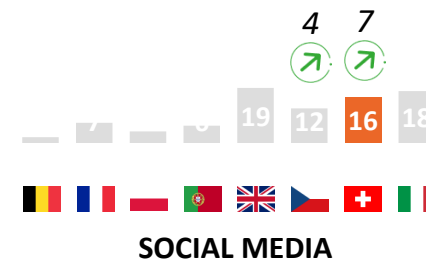
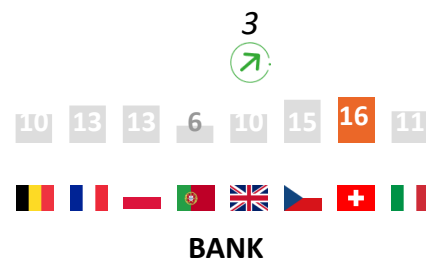
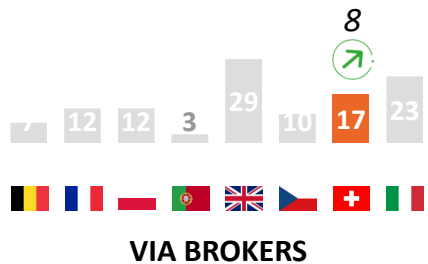
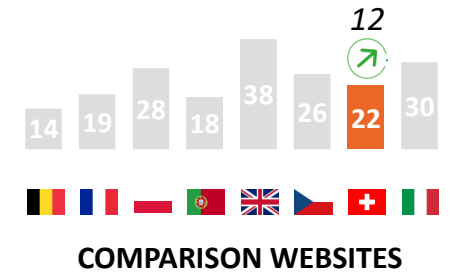
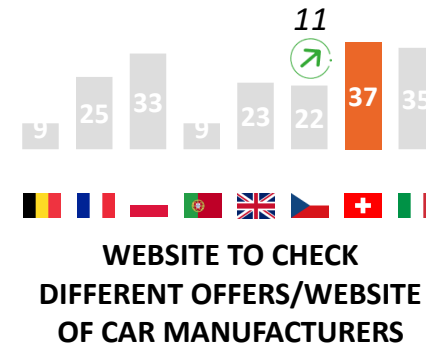
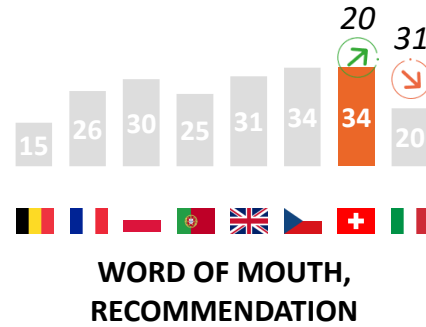
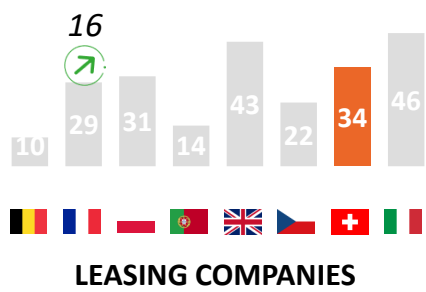
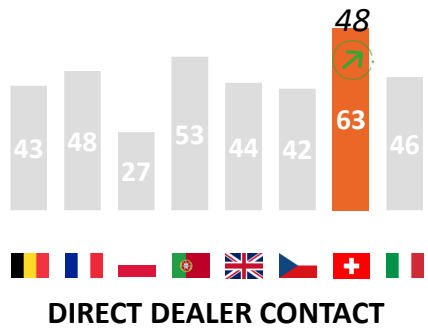
Amongst the following options, what are your main sources of information when choosing your company vehicles?
 Basis: companies with less than 100 employees

MAIN SOURCE OF INFORMATION FOR VEHICLE CHOICE

In %

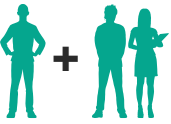


Passenger cars + LCVs



Amongst the following options, what are your main sources of information when choosing your company vehicles?
Basis: companies with less than 100 employees

MAIN SOURCE OF INFORMATION FOR FUNDING METHOD



Focus 1 to 99

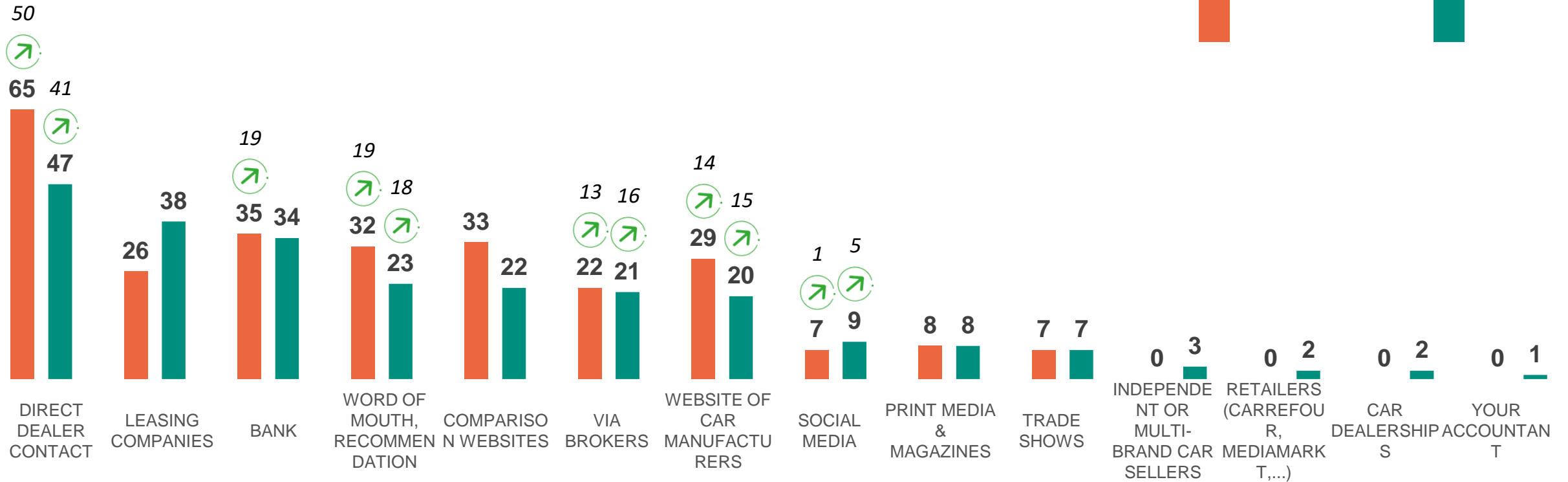
In %



Passenger cars + LCVs



*BE, FR, UK, PL, CH, CZ, IT



Amongst the following options, what are your main sources of information when choosing a funding method for your company vehicles?

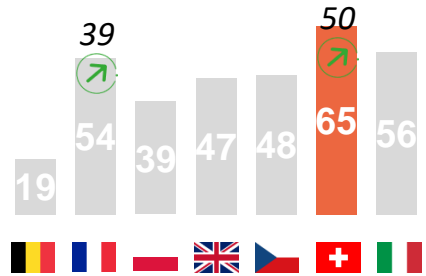
Basis: companies with less than 100 employees

MAIN SOURCE OF INFORMATION FOR FUNDING METHOD

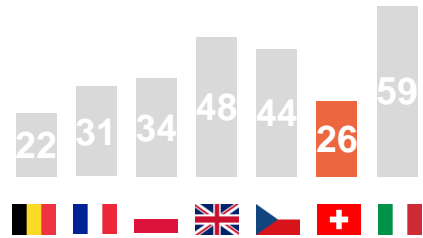
In %



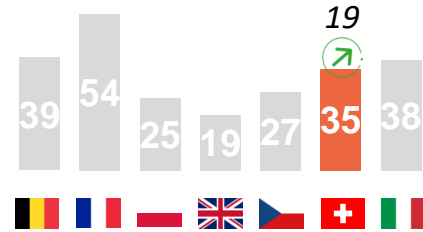
Passenger cars + LCVs



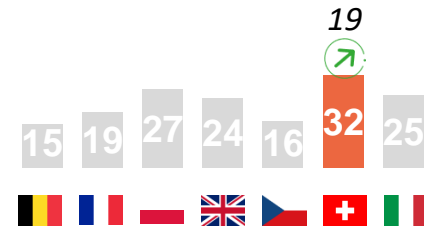
DIRECT DEALER CONTACT



LEASING COMPANIES



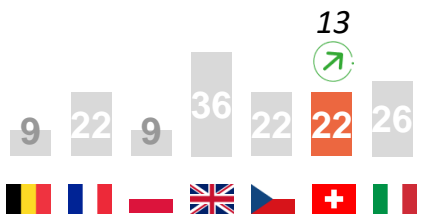
BANK



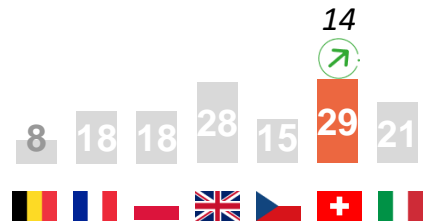
WORD OF MOUTH, RECOMMENDATION



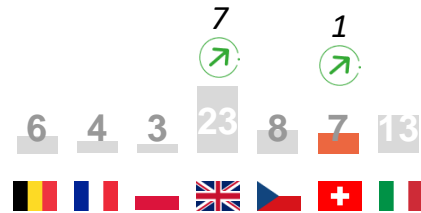
COMPARISON WEBSITES



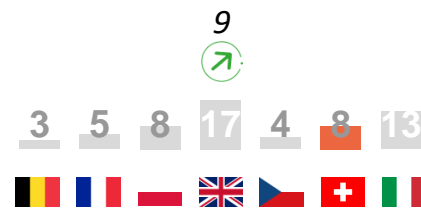
VIA BROKERS



WEBSITE OF CAR MANUFACTURERS



SOCIAL MEDIA



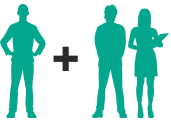
PRINT MEDIA & MAGAZINES



TRADE SHOWS

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

IMPORTANCE OF ONLINE SOURCES FOR VEHICLE CHOICE



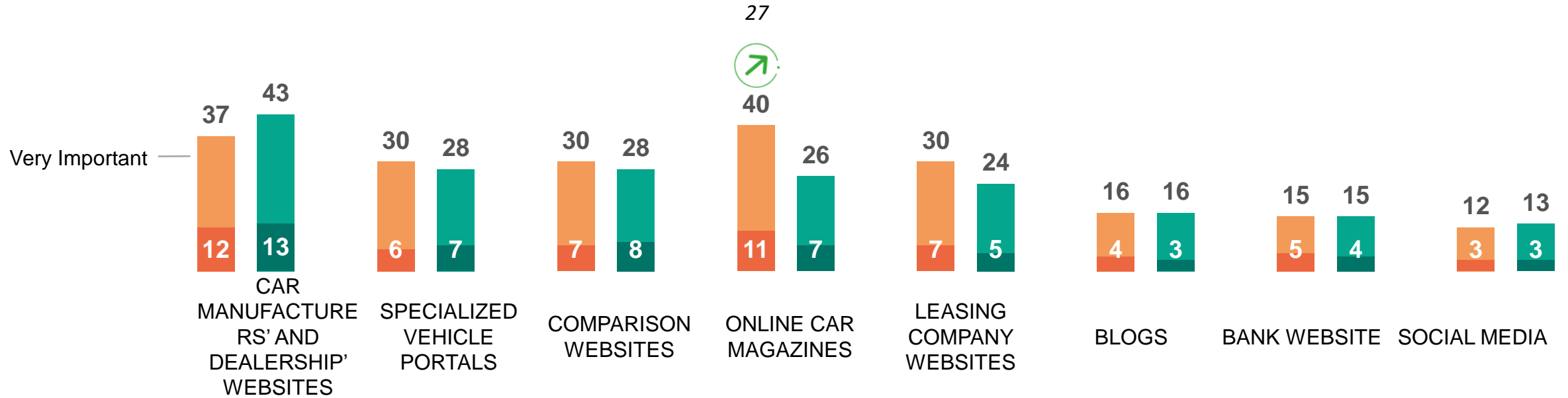
Focus 1 to 99

In %



Passenger cars + LCVs

NET Important
(very + somewhat)



For each of the following sources of information, please tell us whether it is very, somewhat, quite not, not at all important to you to choose a company vehicle. **Basis: companies with less than 100 employees**

IMPORTANCE OF ONLINE SOURCES FOR FUNDING METHOD



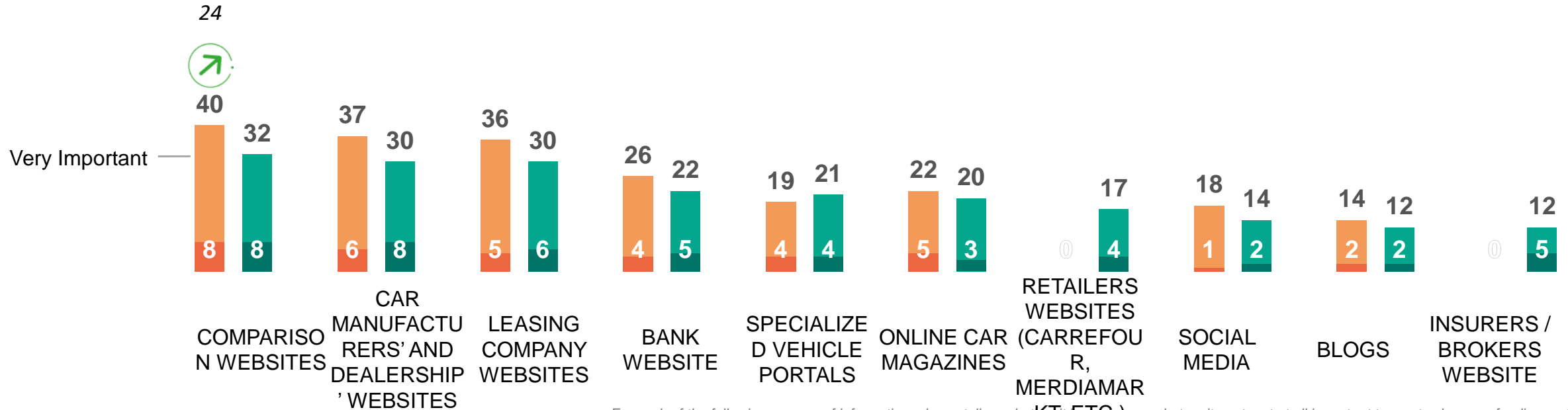
Focus 1 to 99

In %



Passenger cars + LCVs

NET Important
(very + somewhat)



For each of the following sources of information, please tell us whether it is very important, somewhat, quite not, not at all important to you to choose a funding method.
Basis: companies with less than 100 employees

SUMMARY OF VEHICLE PURCHASING PATH

Focus 1 to 99



In %



Passenger cars + LCVs

#1 source of information for vehicle choice:

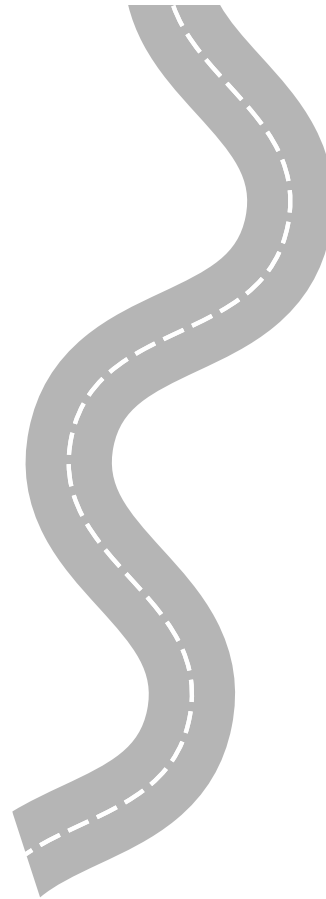
Direct dealer contact

63 ↑ 48

#1 source of information for car funding:

Direct dealer contact

65 ↑ 50



1 subscription channel:

Independent car dealers

54

Main advantage of this buying channel:

Quality of advises

54



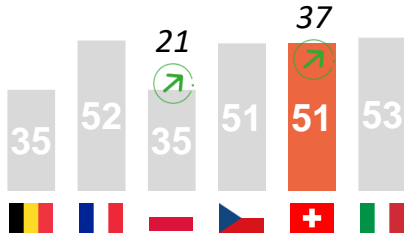
Amongst the following options, what are your main information sources when choosing your company vehicles?
Amongst the following options, what is your main information source when choosing a funding method for your company vehicles?
Once you have decided the company vehicle and the funding method, from 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

SUBSCRIPTION CHANNEL

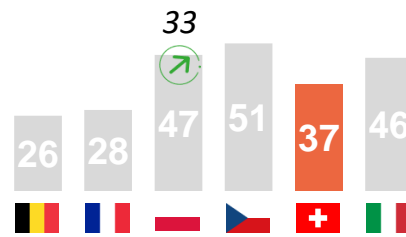
In %



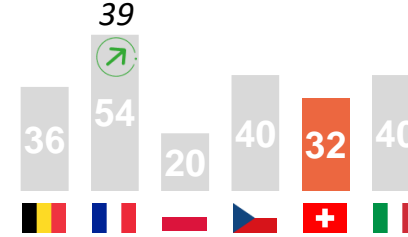
Passenger cars + LCVs



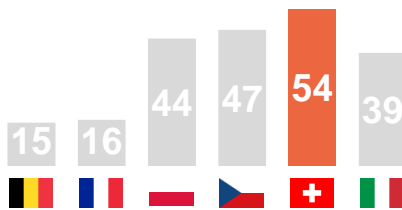
CAR MANUFACTURER DEALERSHIPS



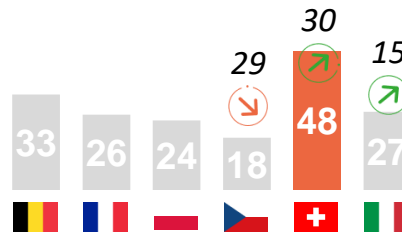
LEASING COMPANIES



YOUR BANK



INDEPENDENT CAR DEALERS



INTERNET

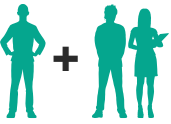


VIA BROKERS

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?

Basis: companies with less than 100 employees

LEASING COMPANIES AS PREFERRED SOURCE



Focus 1 to 99

In %



Passenger cars + LCVs



Leasing companies as preferred source of information for...

Vehicle choice

34

Funding method

26

31

38

* BE, FR, PL, UK, CH, CZ, IT

* BE, FR, PL, UK, CH, CZ, IT

Subscription via Leasing companies

37

39

* BE, FR, PL, CH, CZ, IT

Perceived advantages (among company subscribing via Leasing companies)

Quality of advises **48** (33)

Lower costs **31** (38)

Simple process **29** (32)

Quick or immediate availability of the vehicle **19** (36)

Possibility to have a dedicated contact **14** (38) ↓ (39)

Allows access to a wide choice of cars **9** (32) ↓ (26)

* BE, FR, PL, CH, CZ, IT

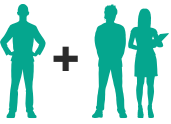


Amongst the following options, what are your main sources of information when choosing your company vehicles?
 Amongst the following options, what are your main sources of information when choosing a funding method for your company vehicles?
 Once you have decided the company vehicle and the funding 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

BANK AS PREFERRED SOURCE

Focus 1 to 99



In %



Passenger cars + LCVs



Bank as preferred source of information for...

Vehicle choice



16

13

* BE, FR, PL, UK, CH, CZ, IT

Funding method

35

34

* BE, FR, PL, UK, CH, CZ, IT



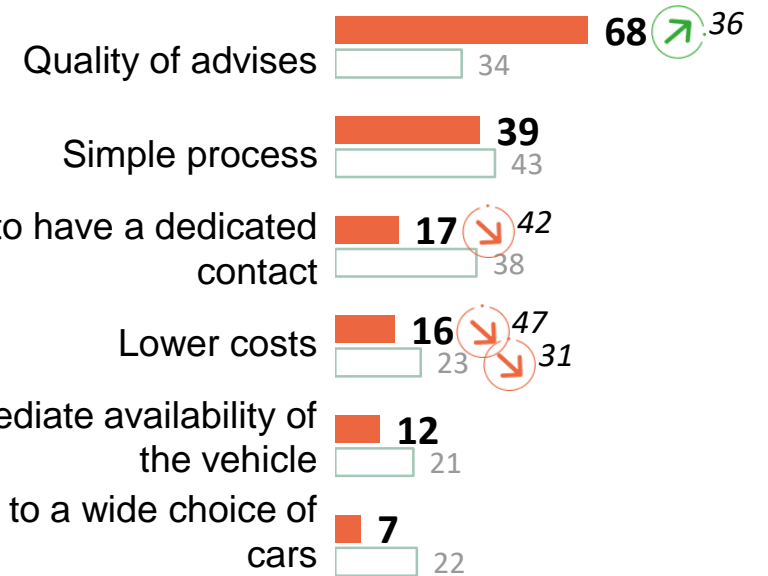
Subscription via the bank

32

37

* BE, FR, PL, CH, CZ, IT

Perceived advantages (among company subscribing via the bank)



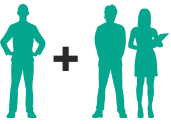
* BE, FR, PL, CH, CZ, IT

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

BROKERS AS PREFERRED SOURCE

Focus 1 to 99



In %



Passenger cars + LCVs



Brokers as preferred source of information for...

Vehicle choice



* BE, FR, PL, UK, CH, CZ, IT

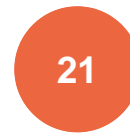
Funding method



* BE, FR, PL, UK, CH, CZ, IT



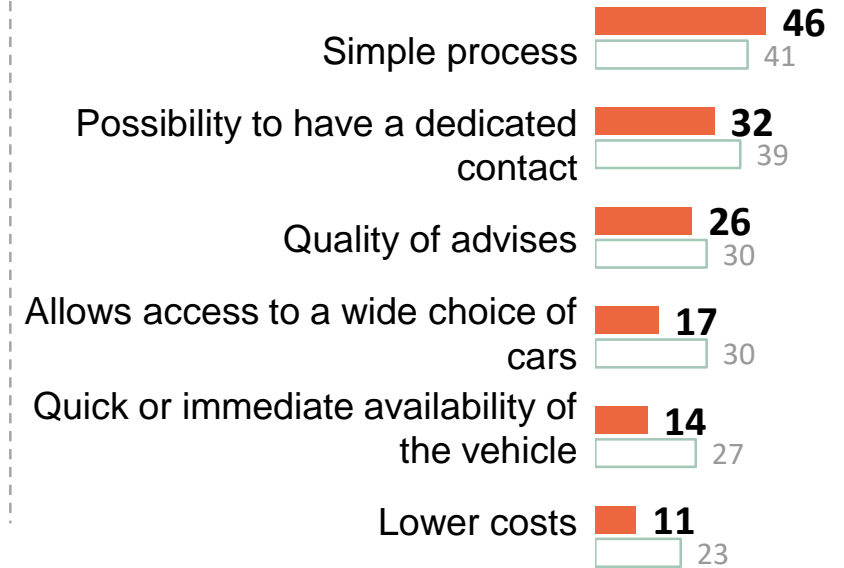
Subscription via Brokers



* BE, FR, PL, CH, CZ, IT



Perceived advantages (among company subscribing via Brokers)



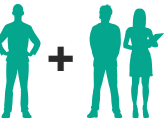
* BE, FR, PL, CH, CZ, IT

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

DIRECT DEALER CONTACT

TRADE SHOWS

Main source of information for...

Main source of information for...

Vehicle choice

Funding method

Vehicle choice

Funding method



63 ↗.48

65 ↗.50

11 ↗.3

7

SME Benchmark*



45

47 ↗.41

10 ↗.7

7

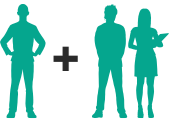
* BE, FR, PL, UK, CH, CZ, IT

Amongst the following options, what are your main sources of information when choosing your company vehicles?
Amongst the following options, what are your main sources of information when choosing a funding method for your company vehicles?

Basis: companies with less than 100 employees

OTHER SOURCES OF INFORMATION

Focus 1 to 99



In %



Passenger cars + LCVs

WEBSITES OF CAR MANUFACTURERS

COMPARISON WEBSITES

Main source of information for...

Main source of information for...

Vehicle choice

Funding method

Vehicle choice

Funding method



37

29  .14

22  .12

33

SME Benchmark*



26  .22

20  .15

25

22

* BE, FR, PL, UK, CH, CZ, IT

Amongst the following options, what are your main sources of information when choosing your company vehicles?
Amongst the following options, what are your main sources of information when choosing a funding method for your company vehicles?

Basis: companies with less than 100 employees

OTHER SOURCES OF INFORMATION

Focus 1 to 99



In %



Passenger cars + LCVs

PRINT & MEDIA MAGAZINES

SOCIAL MEDIA

Main source of information for...

Main source of information for...

Vehicle choice

Funding method

Vehicle choice

Funding method



22

8

16



7



SME Benchmark*



14

8

11

9

* BE, FR, PL, UK, CH, CZ, IT

Amongst the following options, what are your main sources of information when choosing your company vehicles?
Amongst the following options, what are your main sources of information when choosing a funding method for your company vehicles?

Basis: companies with less than 100 employees

OTHER SOURCES OF INFORMATION

Focus 1 to 99



In %



Passenger cars + LCVs

WORD OF MOUTH

Main source of information for...

Vehicle choice

Funding method



34 ↗.20

32 ↗.19

SME Benchmark*



27

23 ↗.18

* BE, FR, PL, UK, CH, CZ, IT

Amongst the following options, what are your main sources of information when choosing your company vehicles?
Amongst the following options, what are your main sources of information when choosing a funding method for your company vehicles?

Basis: companies with less than 100 employees

5

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



ALTERNATIVE FUEL TECHNOLOGIES ADOPTION POTENTIAL IS HIGH EVEN THOUGH 100% BEV ADOPTION REMAINS SLOWER FOR LCVs

1

- **51% of the companies have implemented at least one alternative fuel technology** among PHEV, HEV and 100% BEV – this is stable and somehow below the 59% European average. Overall, **potential is higher though, 83% intending to use one within the next 3 years** (77% for the European average).

100% BEV shows the highest potential and the only one increasing, especially among the 1/99 employee's companies.

2

- **As for LCVs, 100% BEV is still marginal**, being used by less than 1 out of 10 companies and showing a weakening adoption potential (22%, -5 pts). Fuel Cell is even more confidential.

3

- **The lower environmental impact is the main driver of adoption for passenger cars**, ahead of CSR policies and of the reduced fuel expenses – same picture as in overall Europe. **The picture is different regarding LCVs, alternative fuel technologies adoption being driven by companies' image first**, far above the European average (42% vs 23%).

But expectations are positive : alternative fuel technologies should represent almost half of passenger cars fleets, and around 40% for LCVs fleets in the next 3 years.

4

- **Only a few companies (13%) are eligible to an ESG public regulatory reporting today** but almost 2 more out of 5 will be eligible in the next 2 years. Employees mobility is of high importance for half of them.

ENERGY MIX



**AT LEAST ONE ALTERNATIVE
IMPLEMENTED OR CONSIDERED***

for Passenger cars

ALREADY
USING OR
CONSIDER
USING IN THE
NEXT 3 YEARS



**EXPECTED PART OF 100%
ELECTRIC PASSENGER CAR IN 3 YEARS**



**AT LEAST ONE ALTERNATIVE
IMPLEMENTED**

for Passenger cars



**EXPECTED PART OF 100%
ELECTRIC LCV IN 3 YEARS**



*LIST OF ENERGIES: Hybrid, Plug-in Hybrid, 100% Battery Electric Vehicle

CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

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

In %



Passenger cars

HOW TO READ THE RESULTS ?

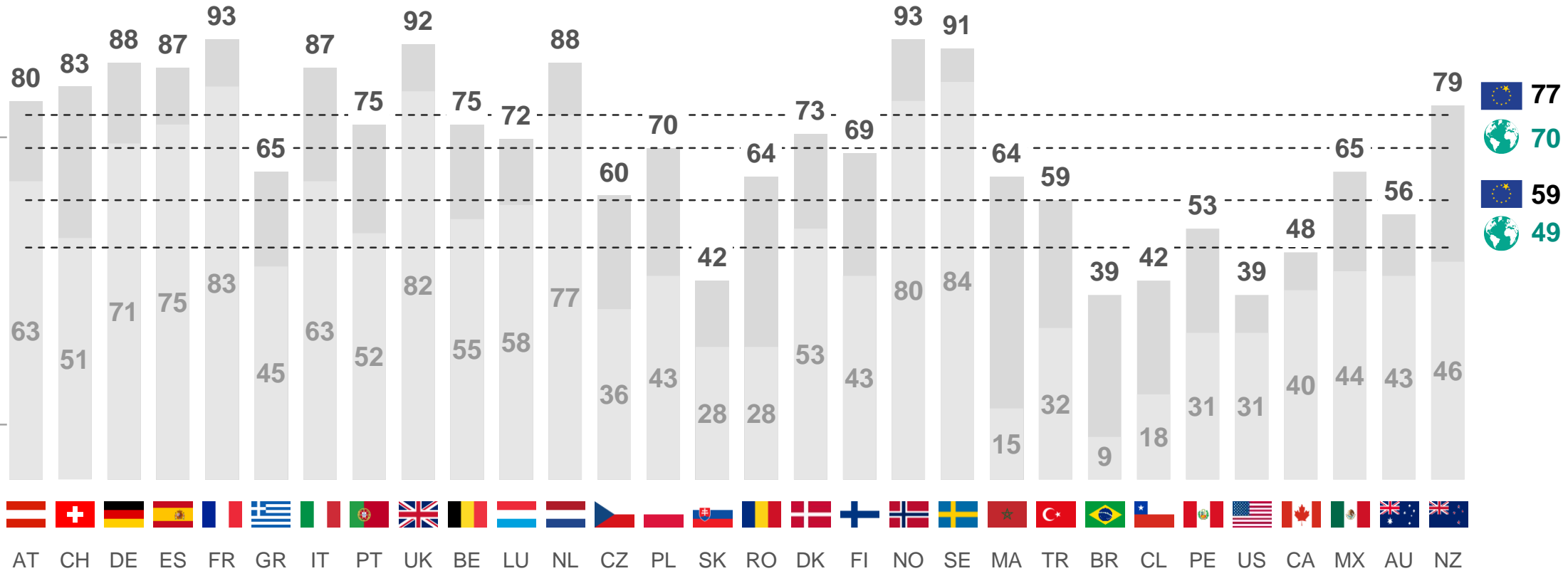
In Switzerland, 83% of the companies are already using or consider to implement at least one alternative technology in the next 3 years. 51% of the companies is currently using at least one.



ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS



ALREADY USING



EU 77
 Global 70
 EU 59
 Global 49

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

Basis: companies with passenger cars

CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

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

In %

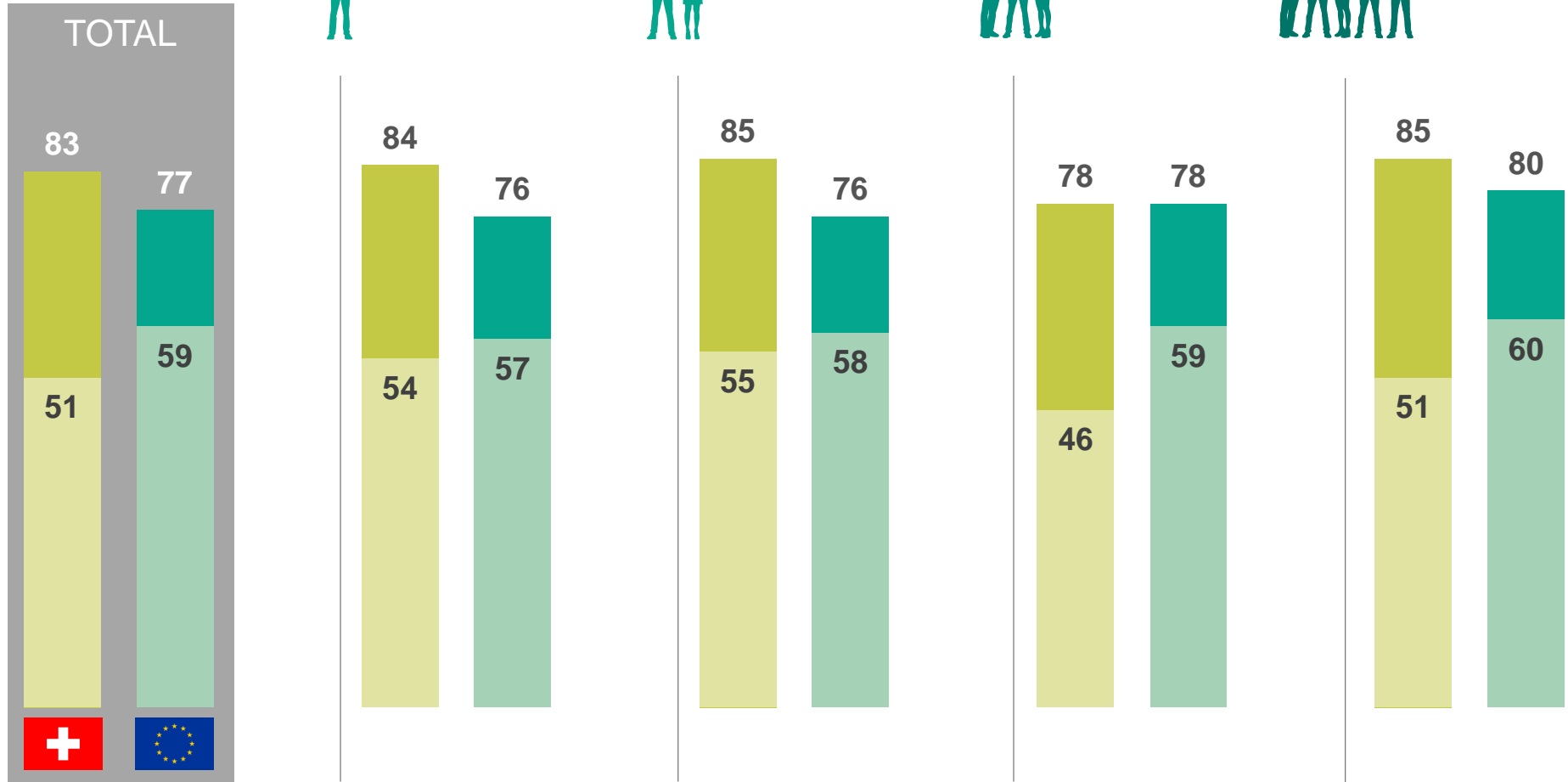
Passenger cars



ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS



ALREADY USING



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

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years

In %



Passenger cars



ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

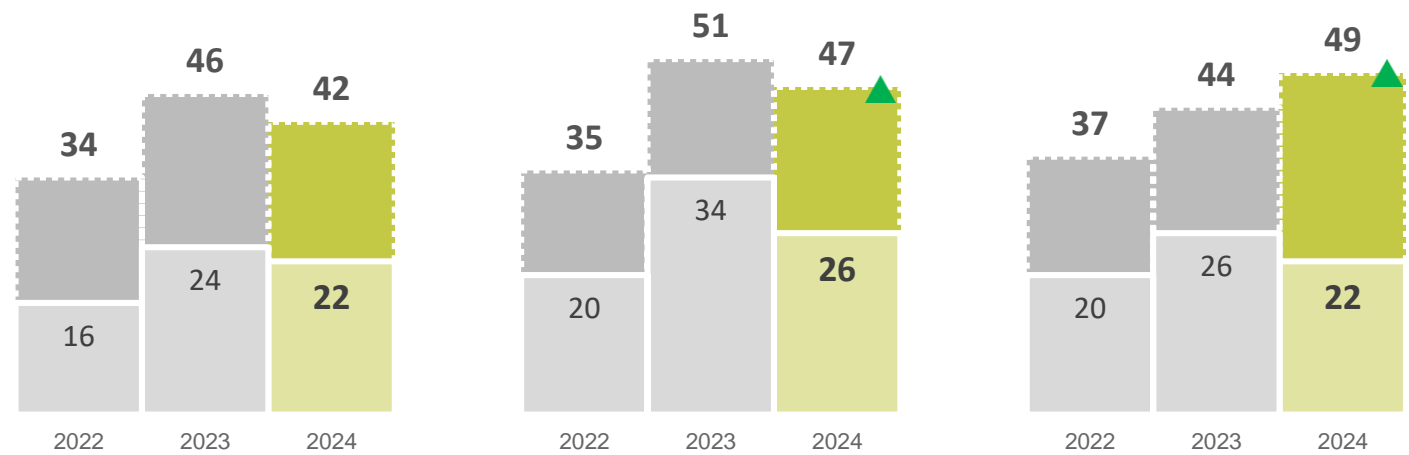


ALREADY USING

Plug-in Hybrid

Hybrid

100% Battery Electric Vehicle



Region	Technology	2022	2023	2024
EU	ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS	37	44	43 ▲
	ALREADY USING	24	29	29 ▲
Other	ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS	38	44	42 ▲
	ALREADY USING	26	29	28
Other	ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS	34	40	42 ▲ ↗
	ALREADY USING	19	24	25 ▲

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

Basis: companies with passenger cars

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years – Focus Less than 10 empl.

In %



Passenger cars



ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS



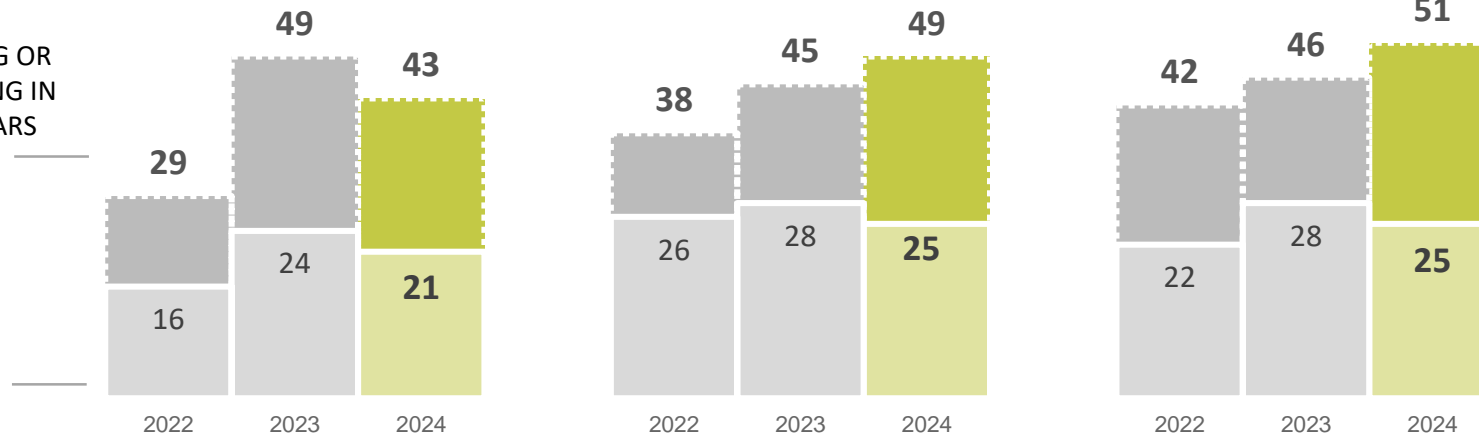
ALREADY USING



Plug-in Hybrid

Hybrid

100% Battery Electric Vehicle



36	44	42	▲
22	30	28	▲

36	42	40	▲
25	27	27	

32	39	41	▲
18	22	24	▲

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

Basis: companies with passenger cars

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years – Focus on 1 to 99

In %



Passenger cars



+



ALREADY USING OR
CONSIDER USING IN
THE NEXT 3 YEARS



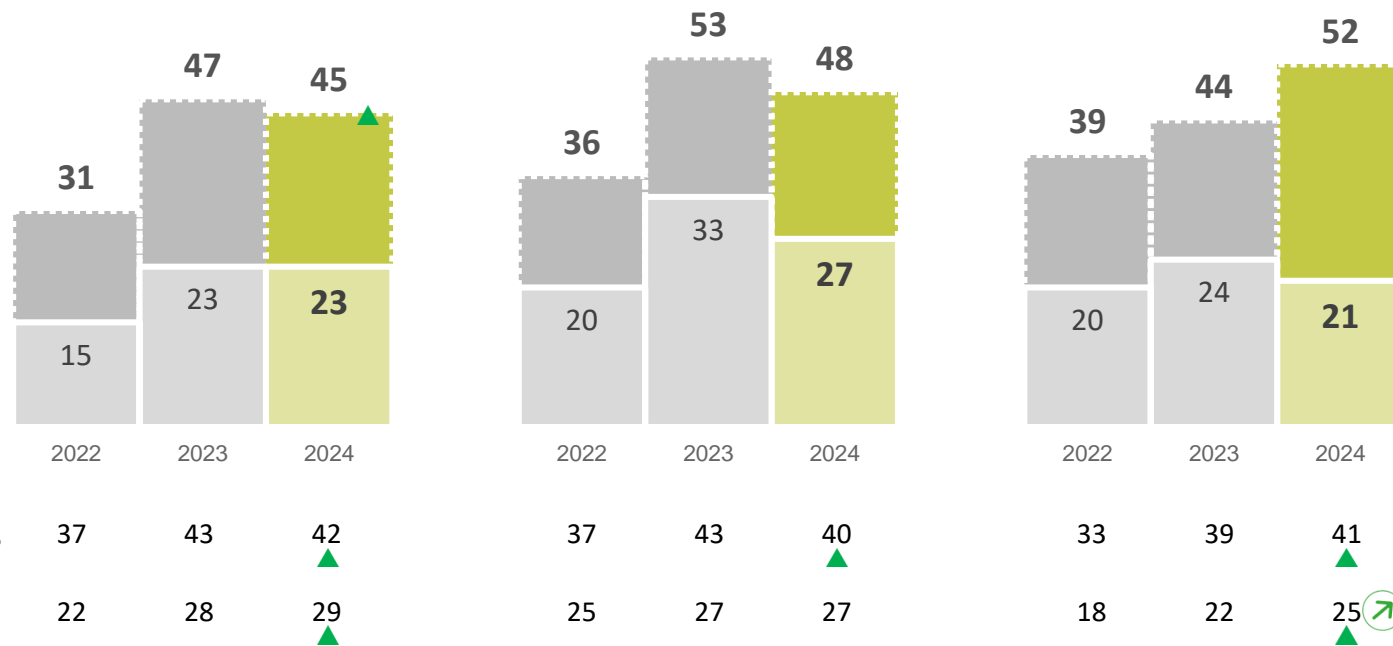
ALREADY
USING



Plug-in Hybrid

Hybrid

100% Battery
Electric Vehicle



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

Basis: companies with passenger cars

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years – Focus on 100 and more

In %



Passenger cars



+



ALREADY USING OR
CONSIDER USING IN
THE NEXT 3 YEARS



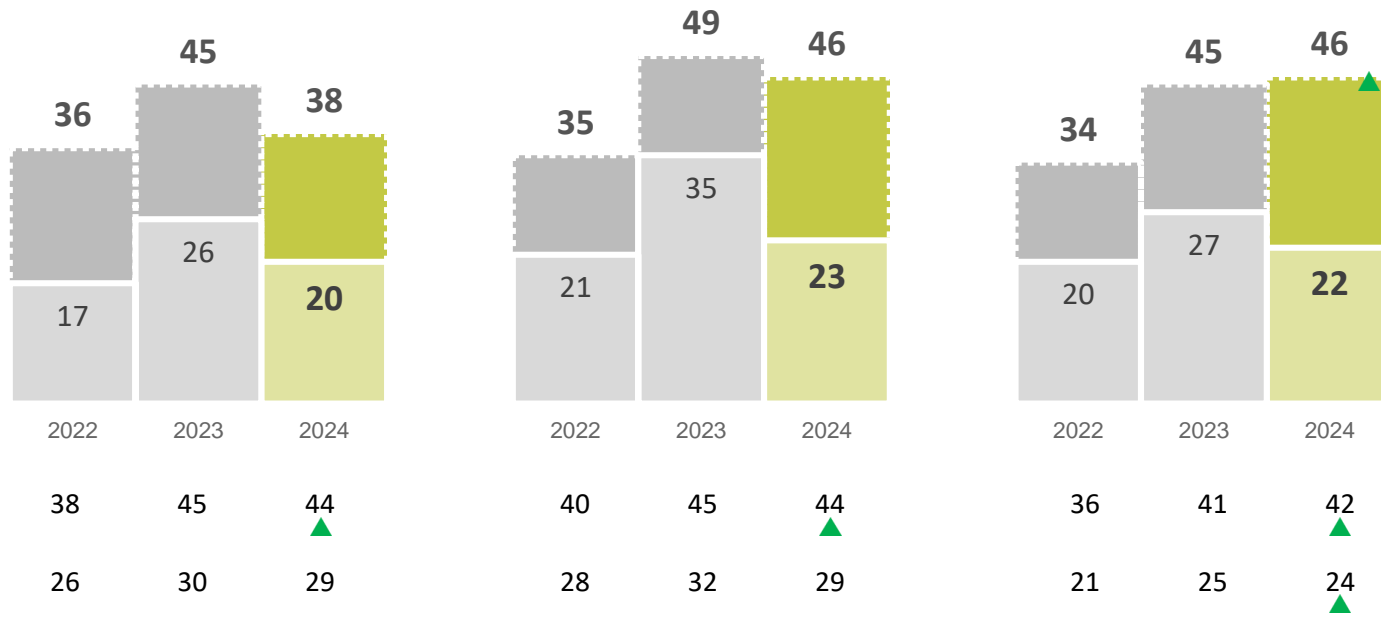
ALREADY
USING



Plug-in Hybrid

Hybrid

100% Battery
Electric Vehicle



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

Basis: companies with passenger cars

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Passenger car fleet

In %



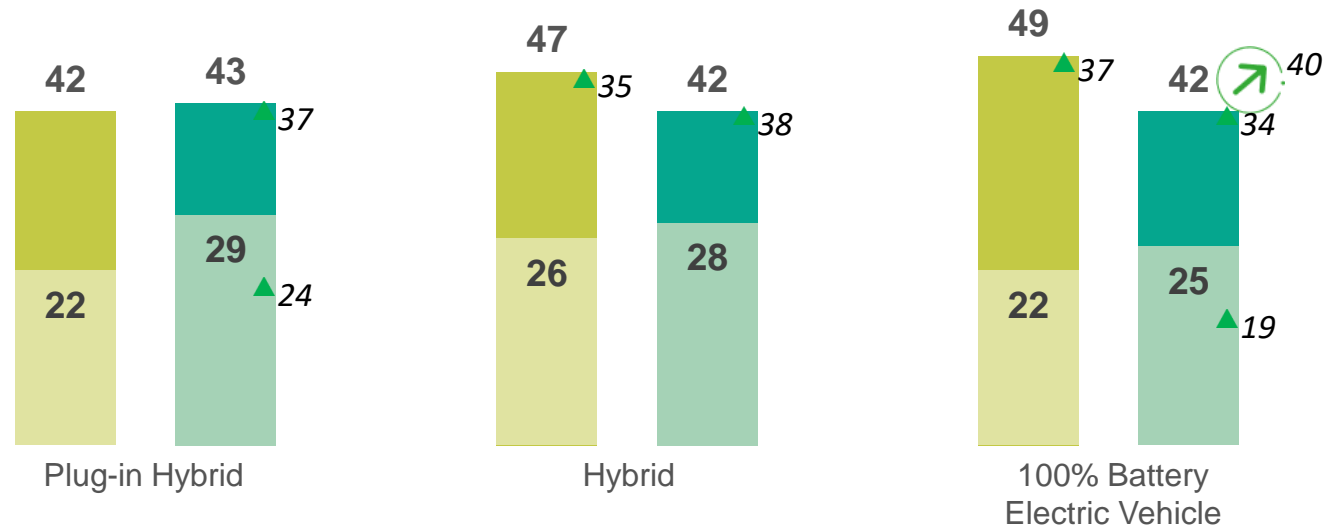
Passenger cars



ALREADY USING
OR CONSIDER
USING IN THE
NEXT 3 YEARS



ALREADY
USING



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

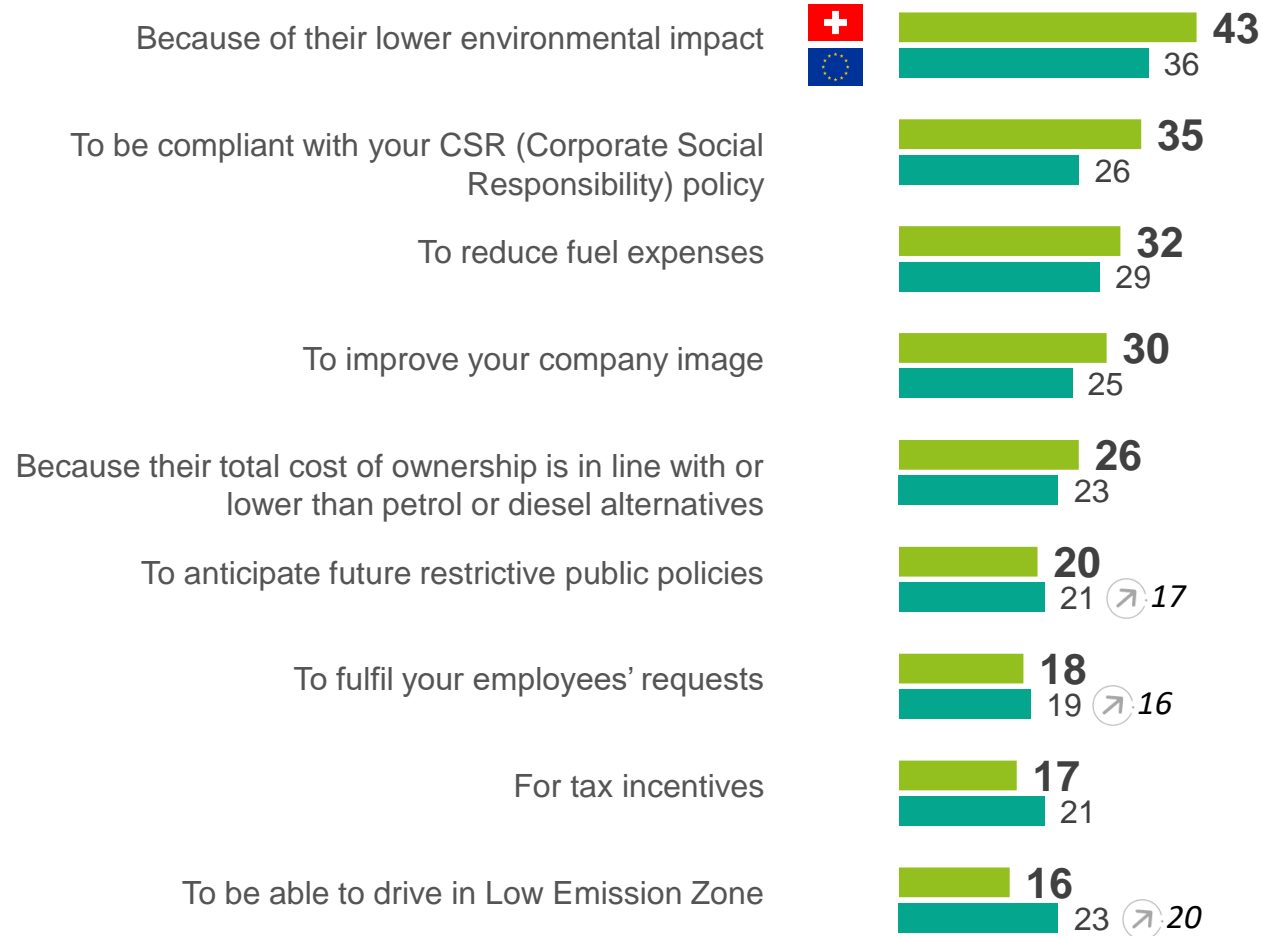
REASONS FOR IMPLEMENTING OR CONSIDERING ALTERNATIVE FUEL TECHNOLOGIES

Passenger car fleet

In %



Passenger cars



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

CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

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

In %



LCVs

HOW TO READ THE RESULTS ?

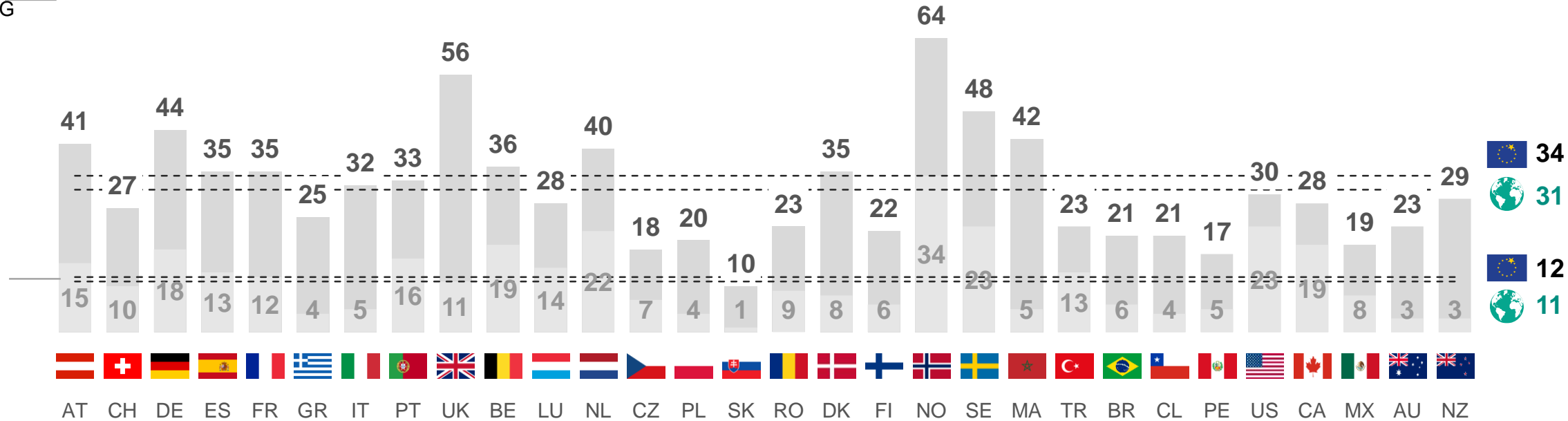
In Switzerland, 27% of the companies are already using or consider to implement at least one alternative technology in the next 3 years. 10% of the companies is currently using at least one.



ALREADY USING
OR CONSIDER
USING IN THE
NEXT 3 YEARS



ALREADY
USING



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

CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

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

In %



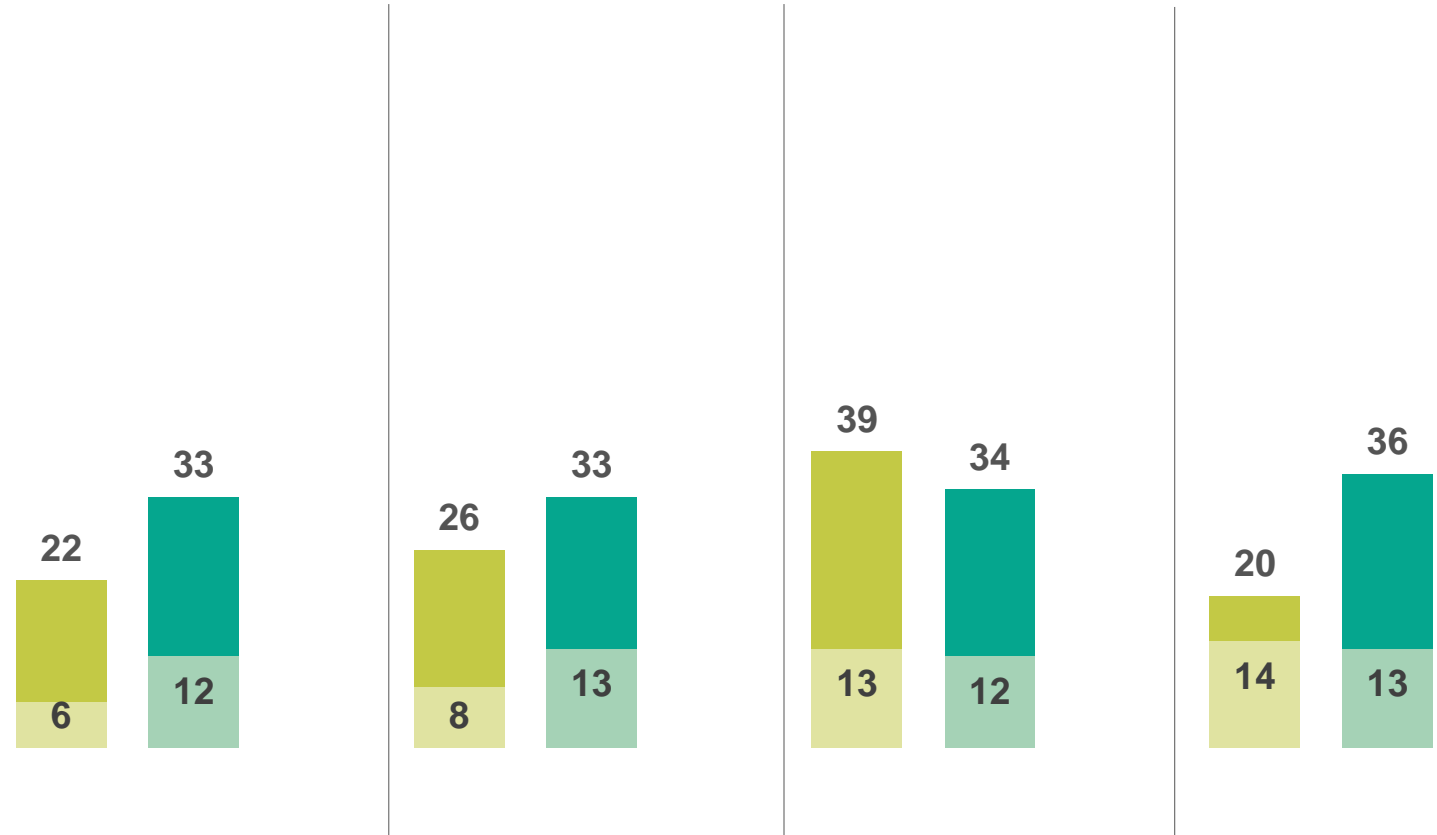
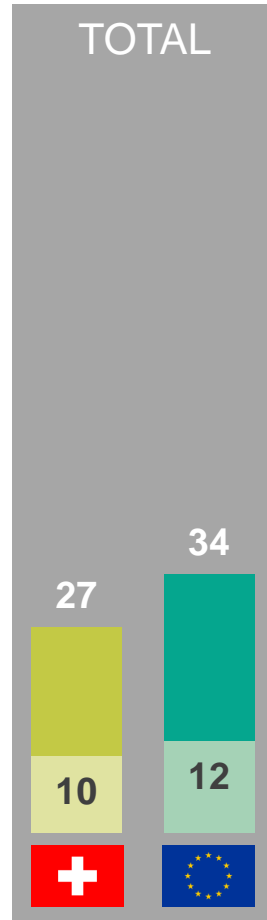
LCVs



ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS



ALREADY USING



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

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years

In %



LCVs

100% Battery Electric Vehicle

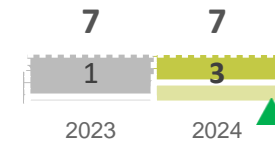
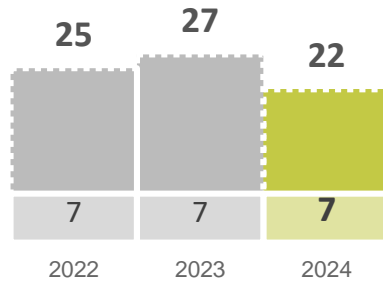
Hydrogen Fuel cell



ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS



ALREADY USING



Region	Technology	2022	2023	2024
EU	100% Battery Electric Vehicle	25	29	27 (↓)
	Hydrogen Fuel cell	9	10	10
Other	100% Battery Electric Vehicle	8	11	11 (↑)
	Hydrogen Fuel cell	2	2	2

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

Basis: companies with LCVs

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years – Focus on 1 to 99

In %



LCVs

100% Battery Electric Vehicle

Hydrogen Fuel cell



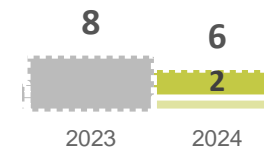
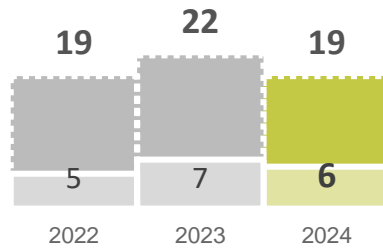
ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS



+



ALREADY USING



23 27 26



7 11 11 ▲

9 10

2 2

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years – Focus on 100 and more

In %



LCVs



+



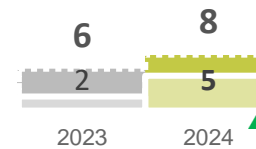
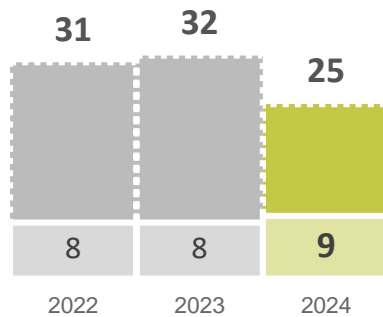
ALREADY USING OR
CONSIDER USING IN
THE NEXT 3 YEARS



ALREADY
USING

100% Battery
Electric Vehicle

Hydrogen Fuel
cell



26	31	29
9	12	11

9	9
2	2

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

LCV Fleet

In %



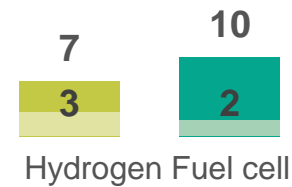
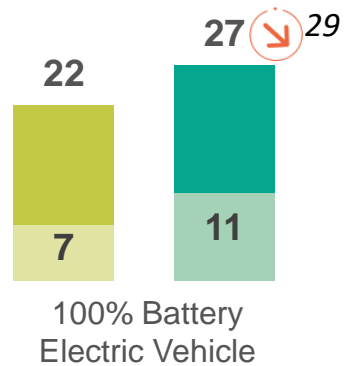
LCVs



ALREADY USING
OR CONSIDER
USING IN THE
NEXT 3 YEARS



ALREADY
IMPLEMENTED



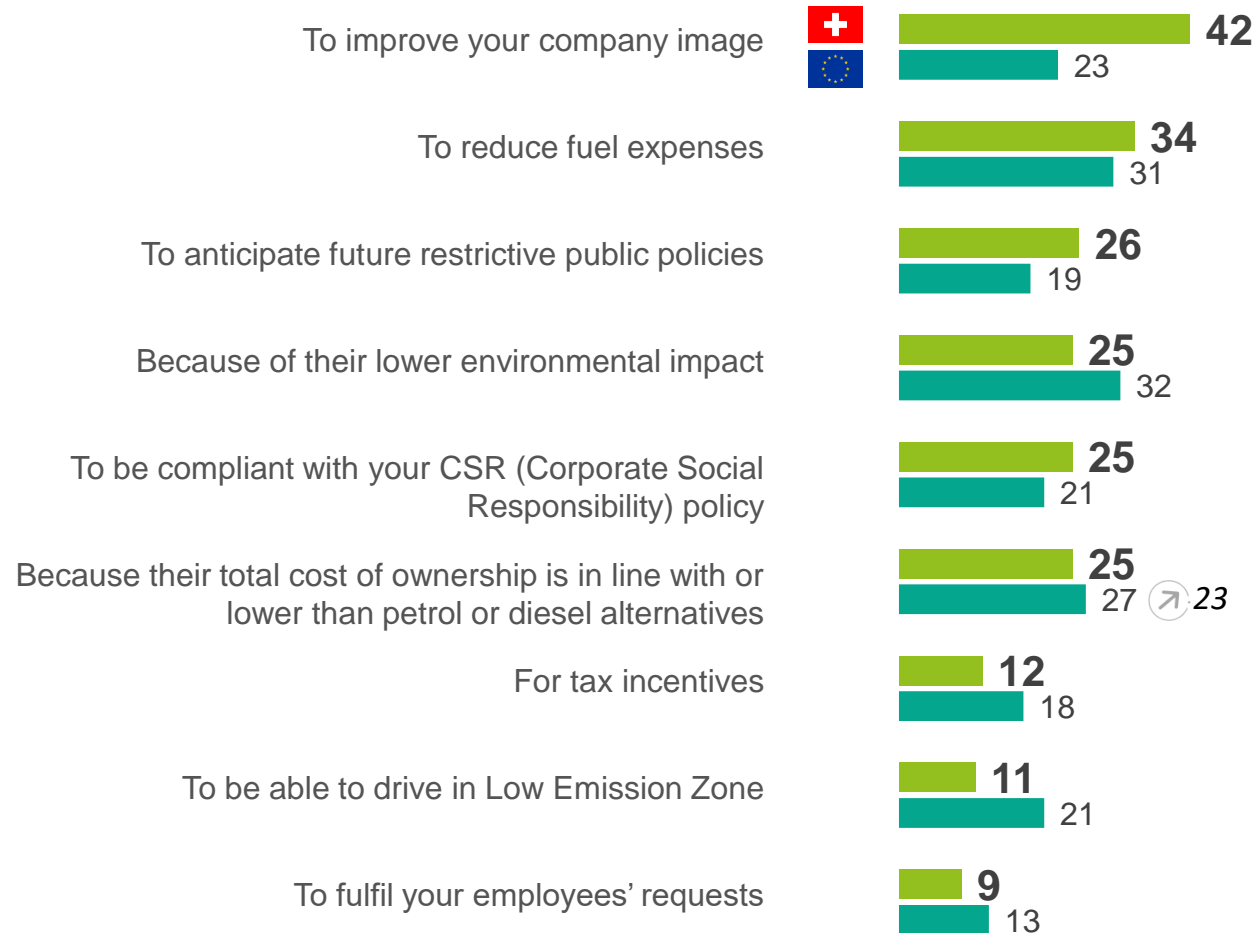
REASONS FOR IMPLEMENTING OR CONSIDERING ALTERNATIVE FUEL TECHNOLOGIES

LCV fleet

In %



LCVs



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

EXPECTED FLEET SHARE PER ENERGY

HOW TO READ THE RESULTS ?

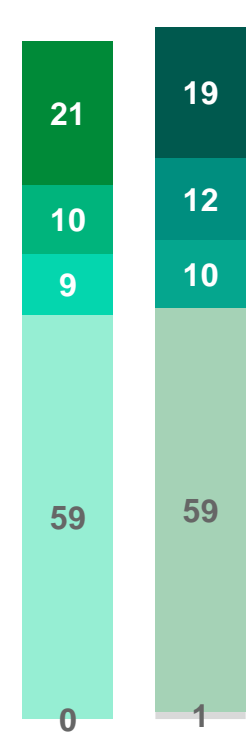
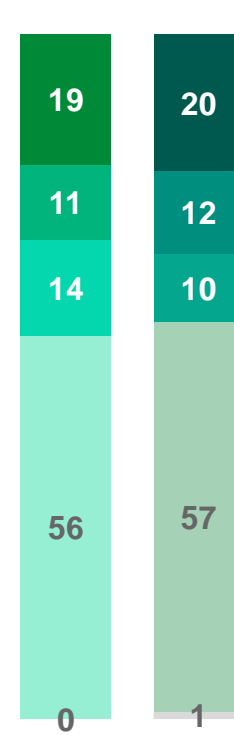
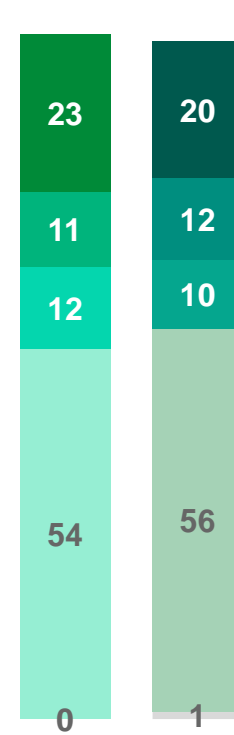
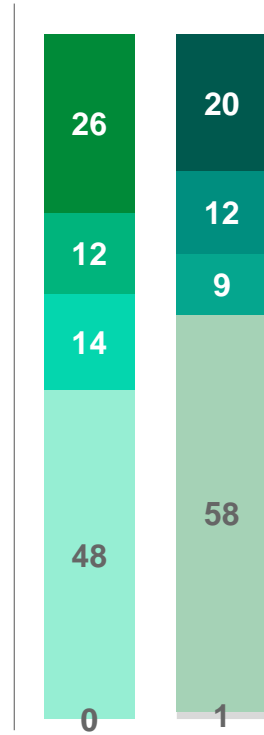
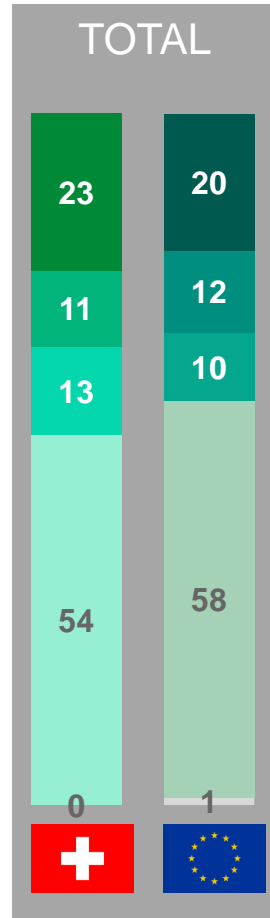
In Switzerland in 3 years, 23% of the companies passenger car fleet is expected to be 100% BEV

In %



Passenger cars

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



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

EXPECTED FLEET SHARE PER ENERGY

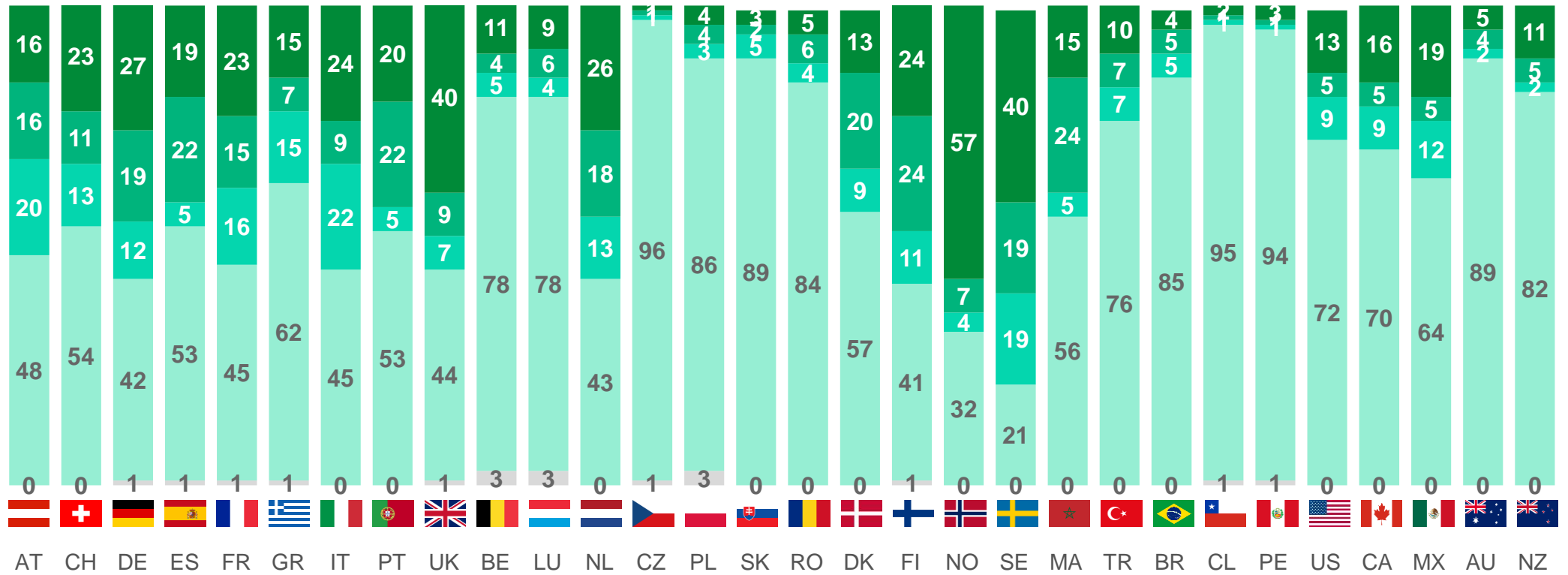
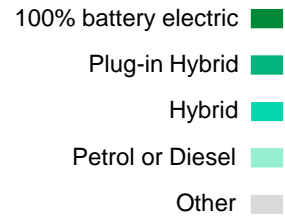
HOW TO READ THE RESULTS ?

In Switzerland in 3 years, 23% of the companies passenger car fleet is expected to be 100% BEV.

In %



Passenger cars



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

EXPECTED FLEET SHARE PER ENERGY

In %



LCVs

HOW TO READ THE RESULTS ?

In Switzerland in 3 years, 13% of the light commercial vehicle fleet is expected to be 100% BEV.



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

EXPECTED FLEET SHARE PER ENERGY

HOW TO READ THE RESULTS ?

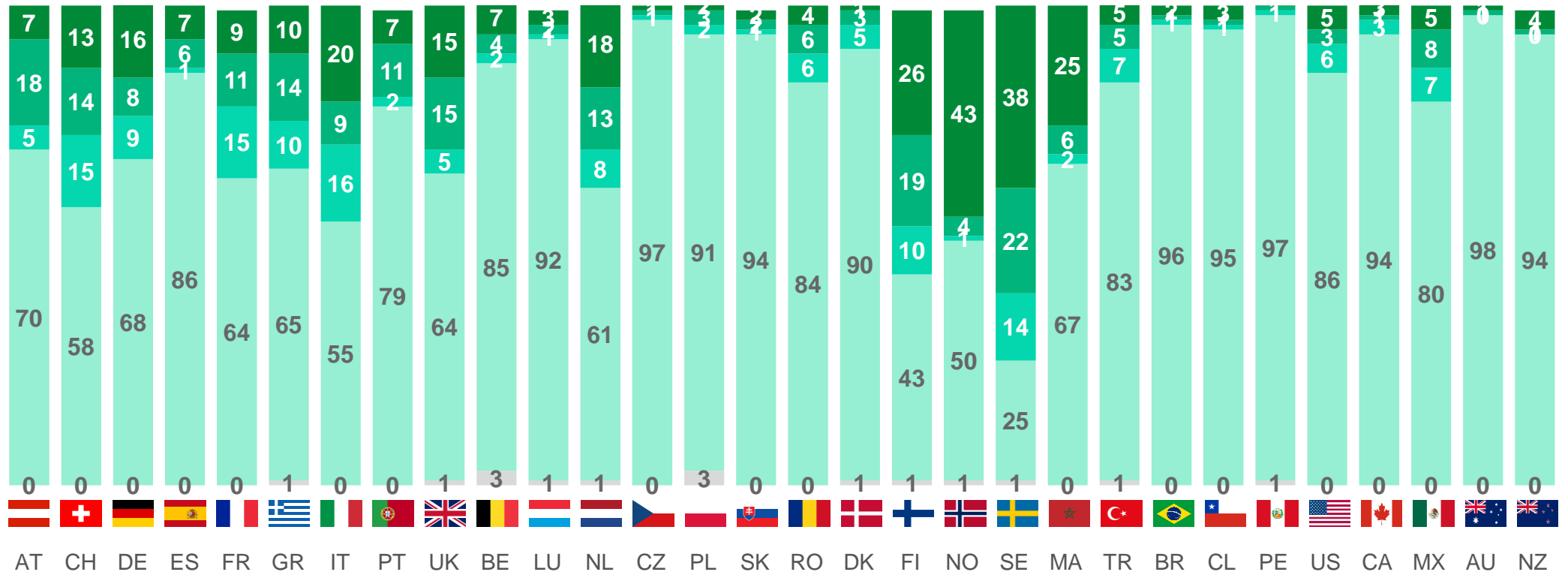
In Switzerland in 3 years, 13% of the light commercial vehicle fleet is expected to be 100% BEV.

In %



LCVs

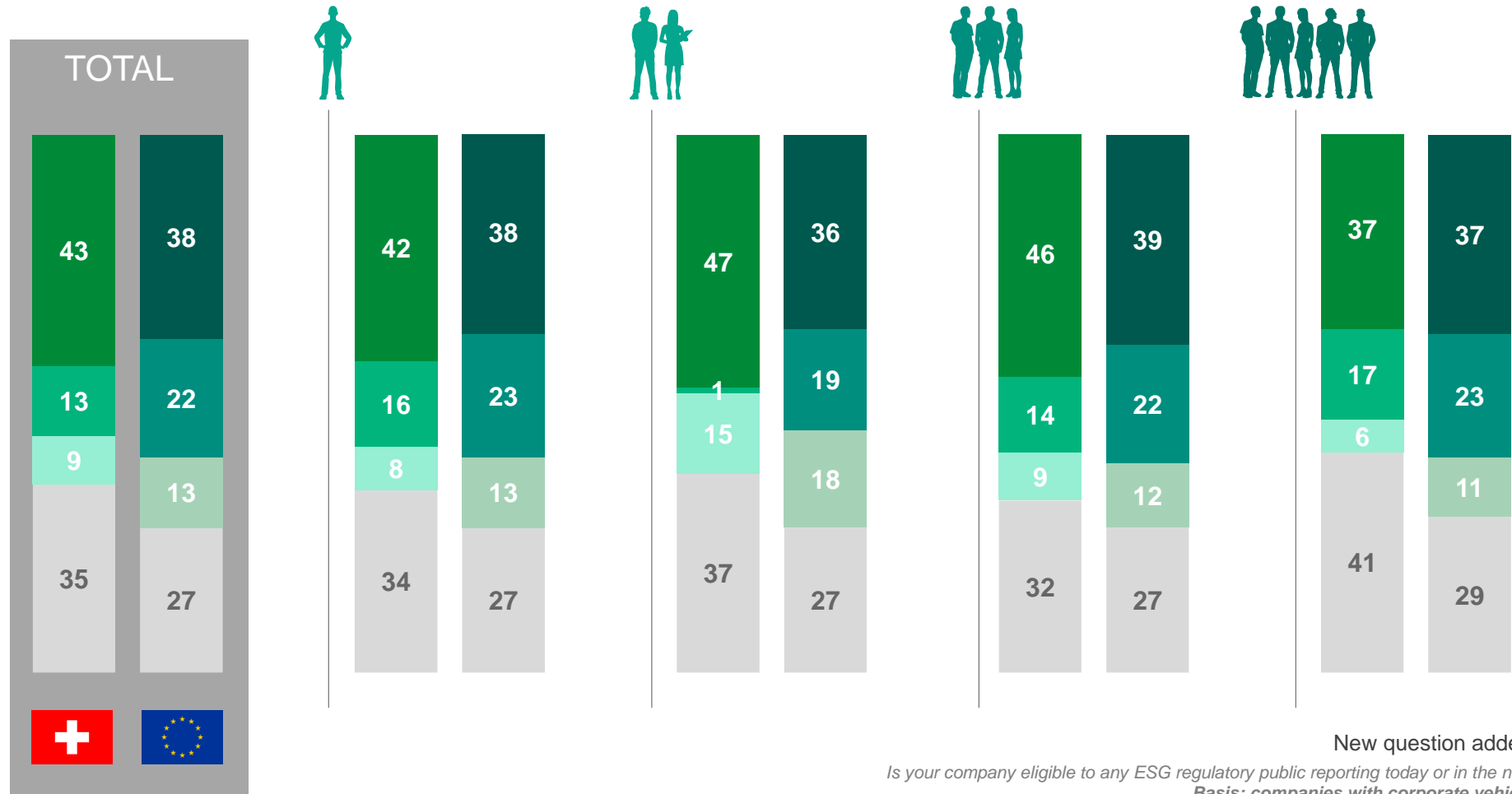
- 100% battery electric
- Plug-in Hybrid
- Hybrid
- Petrol or Diesel
- Other



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

ELIGIBILITY TO ESG REGULATORY PUBLIC REPORTING

In %



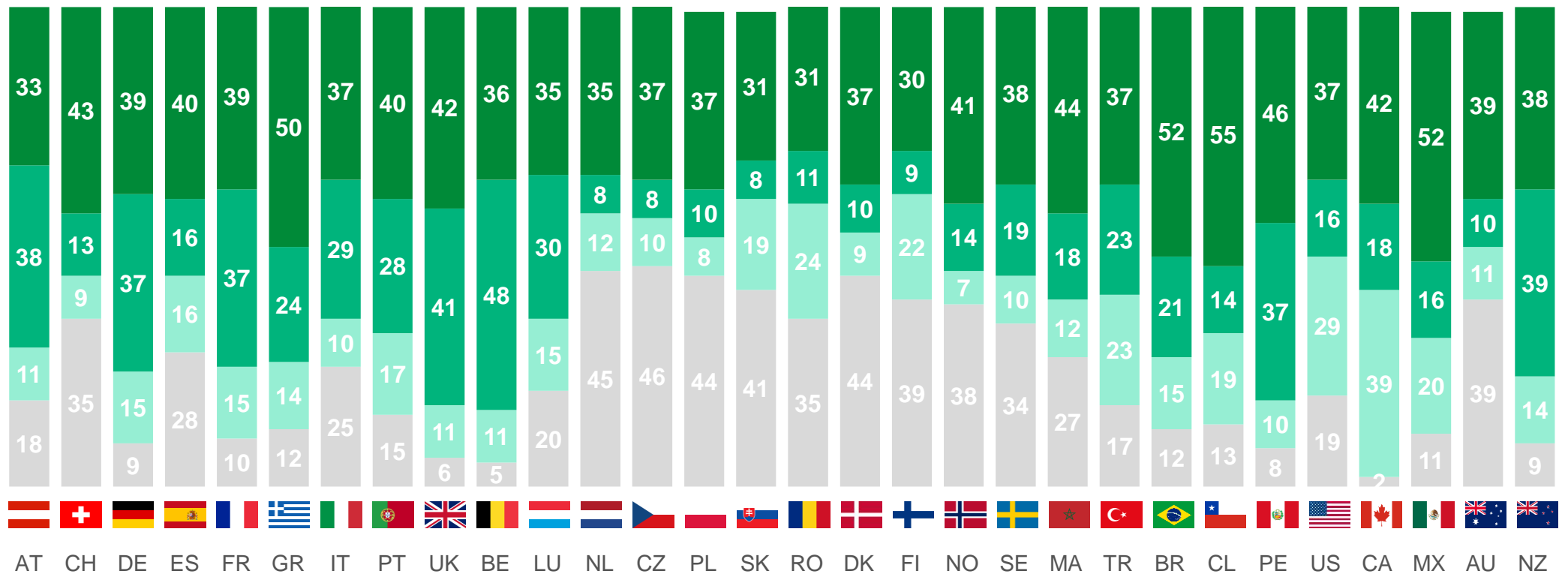
New question added in 2024

Is your company eligible to any ESG regulatory public reporting today or in the next 2 years?
Basis: companies with corporate vehicles = 100%

ELIGIBILITY TO ESG REGULATORY PUBLIC REPORTING

In %

Yes, but in the next 2 years
 Yes, today
 No
 Don't know

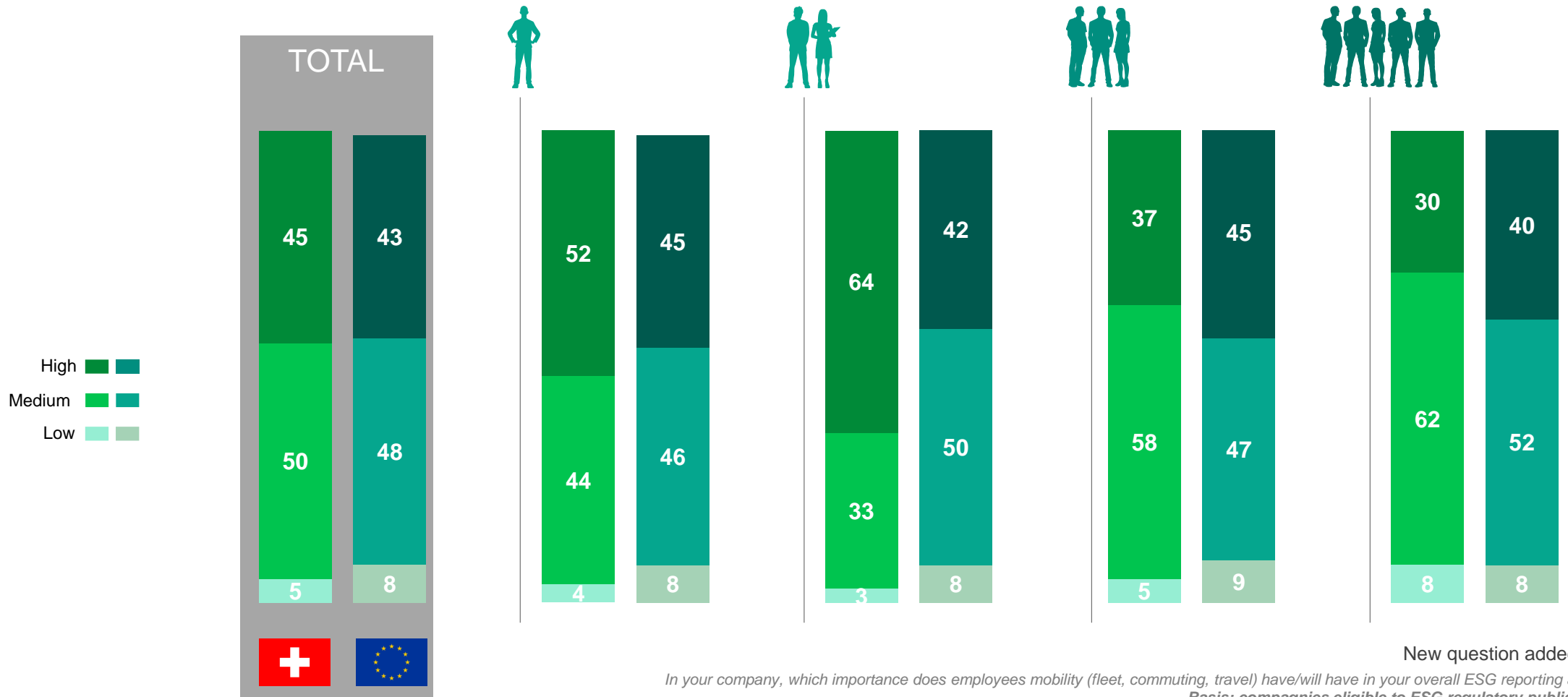


New question added in 2024

Is your company eligible to any ESG regulatory public reporting today or in the next 2 years?
 Basis: companies with corporate vehicles = 100%

IMPORTANCE OF EMPLOYEES MOBILITY IN ESG REPORTING

In %

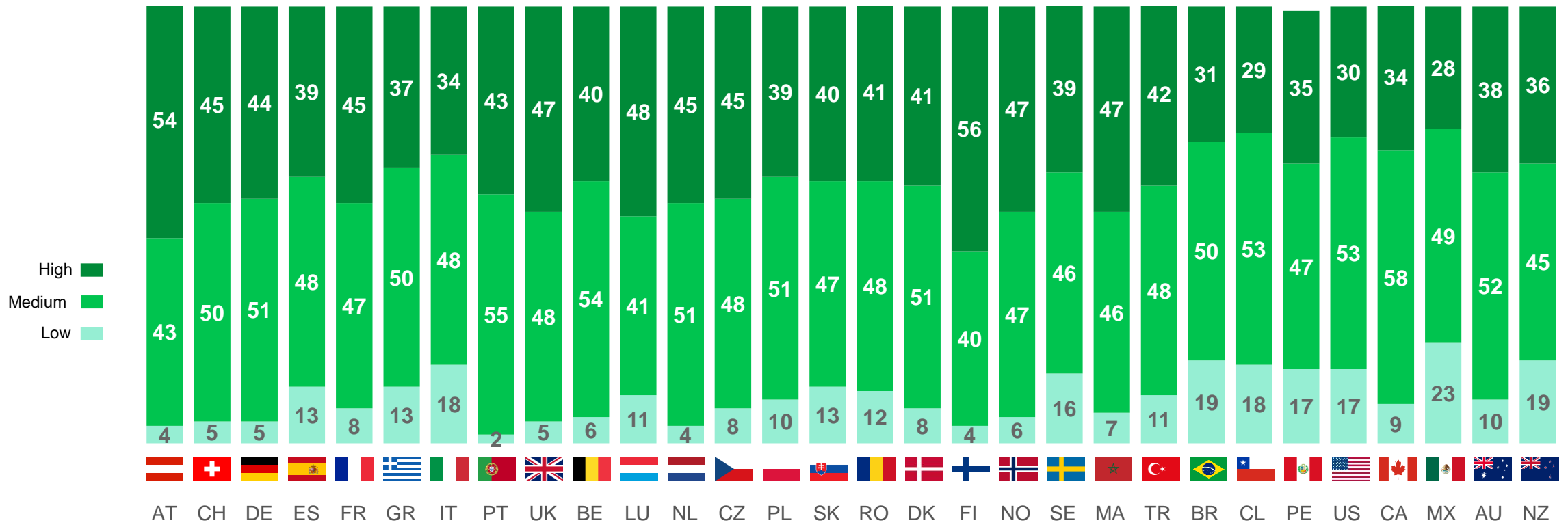


New question added in 2024

In your company, which importance does employees mobility (fleet, commuting, travel) have/will have in your overall ESG reporting approach ?
 Basis: companies eligible to ESG regulatory public reporting

IMPORTANCE OF EMPLOYEES MOBILITY IN ESG REPORTING

In %



New question added in 2024

In your company, which importance does employees mobility (fleet, commuting, travel) have/will have in your overall ESG reporting approach?
Basis: companies eligible to ESG regulatory public reporting

5

ENERGY MIX FOCUS PER ALTERNATIVE TECHNOLOGY



HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %



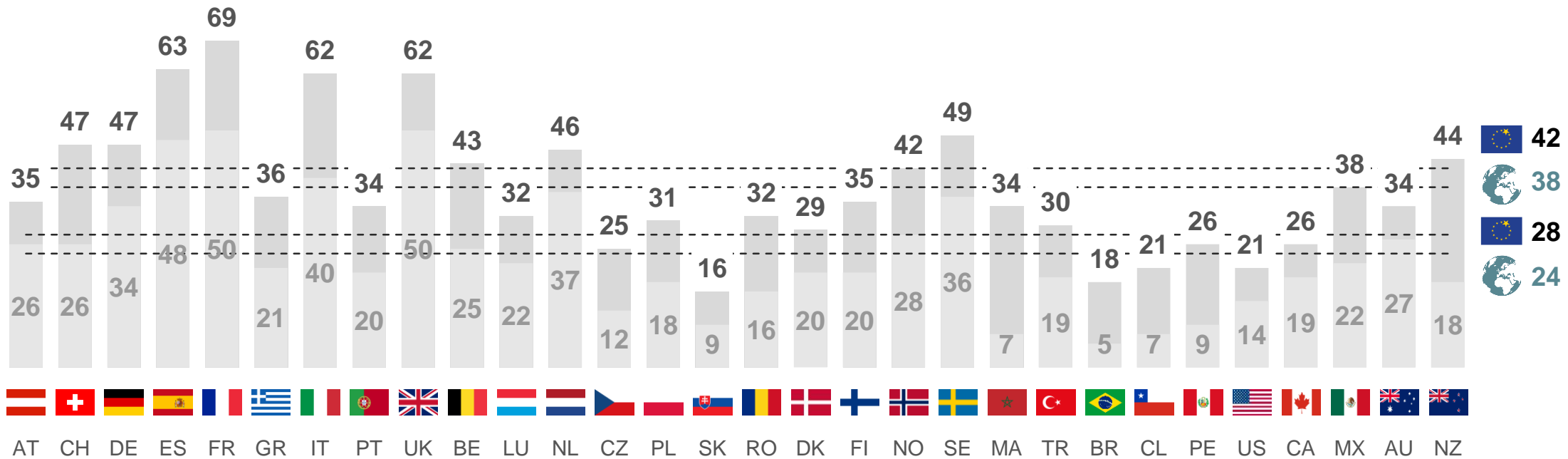
Passenger cars



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



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

HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %



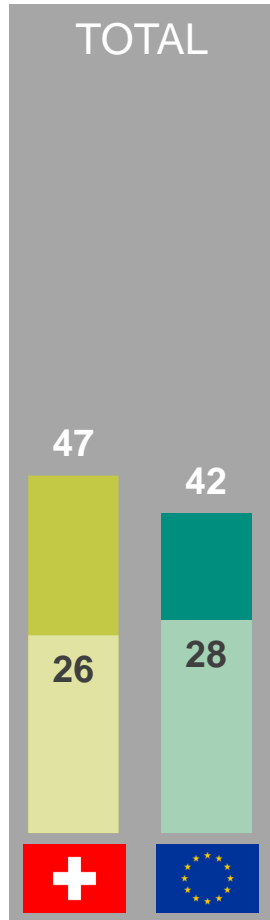
Passenger cars



ALREADY USING
OR CONSIDER
USING IN THE
NEXT 3 YEARS



ALREADY
USING



49

25



47

31



46

23



47

24

40

27

40

26

43

29

45

30

PLUG-IN HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %



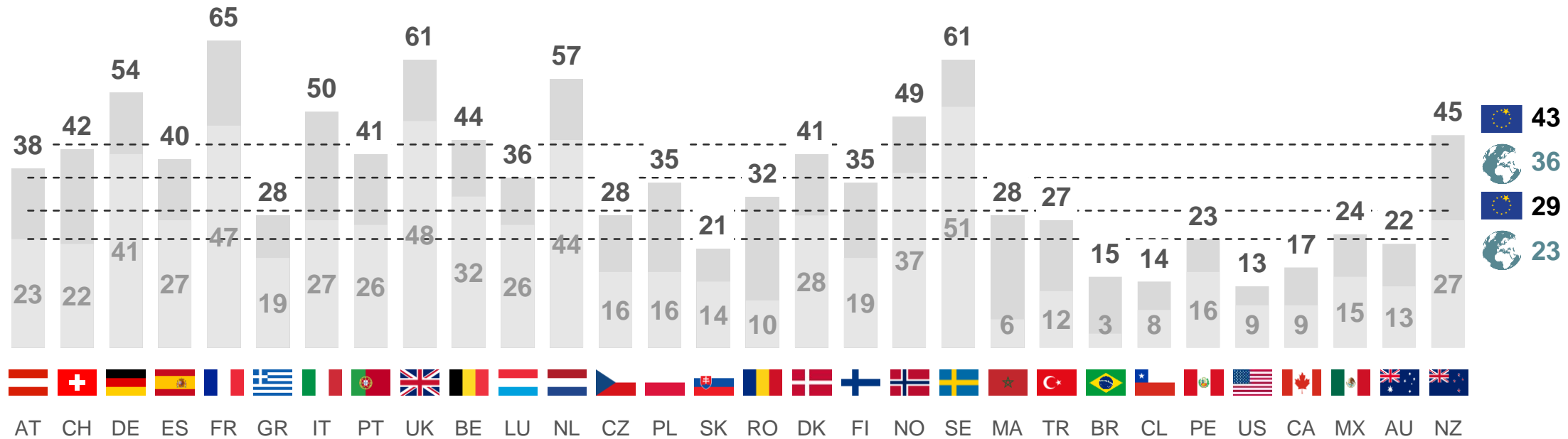
Passenger cars



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING

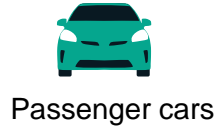


Amongst the following alternative fuel technologies, which ones do you currently use...?
Amongst the following alternative fuel technologies, which ones are you considering using...?

Basis: companies with passenger cars

PLUG-IN HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

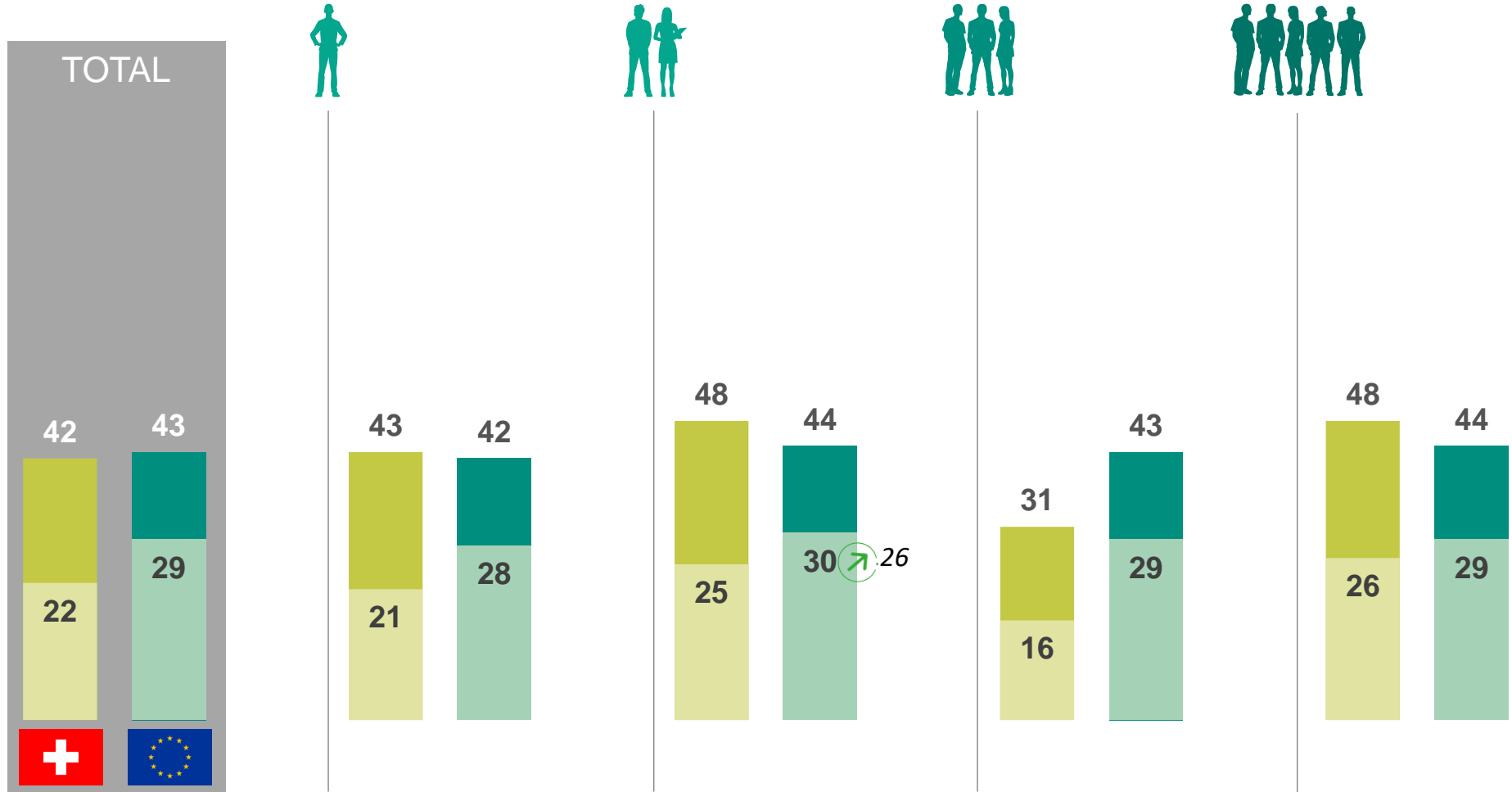
In %



ALREADY USING
OR CONSIDER
USING IN THE
NEXT 3 YEARS



ALREADY
USING



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

Basis: companies with passenger cars

100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %



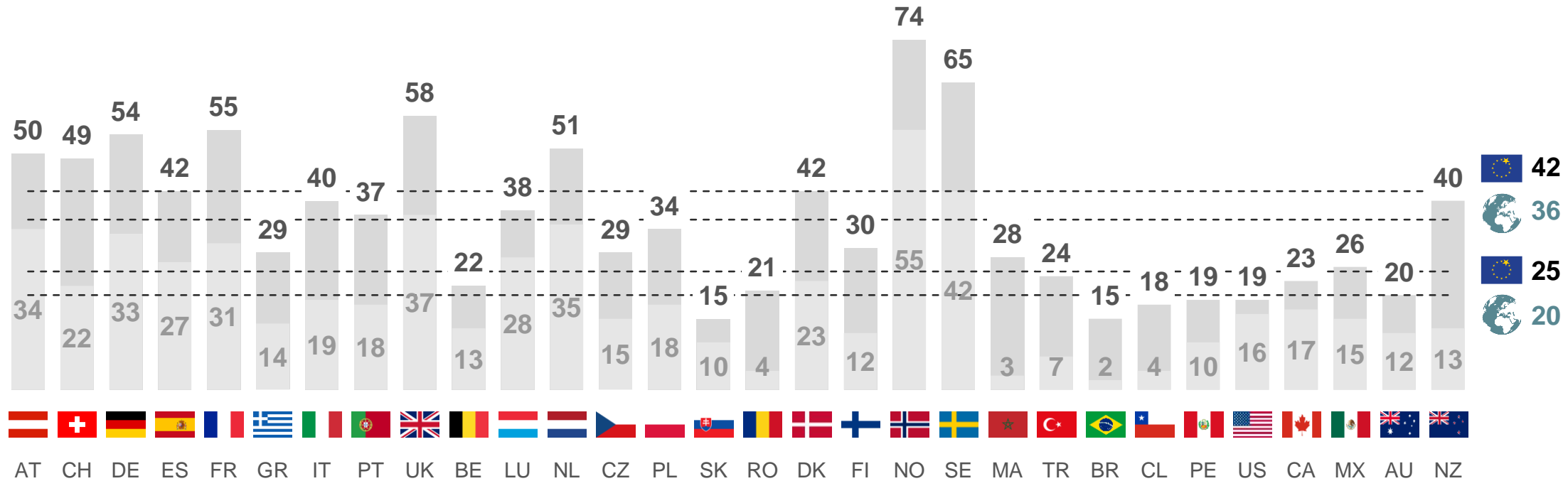
Passenger cars



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



AT CH DE ES FR GR IT PT UK BE LU NL CZ PL SK RO DK FI NO SE MA TR BR CL PE US CA MX AU NZ

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

Basis: companies with passenger cars

100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %



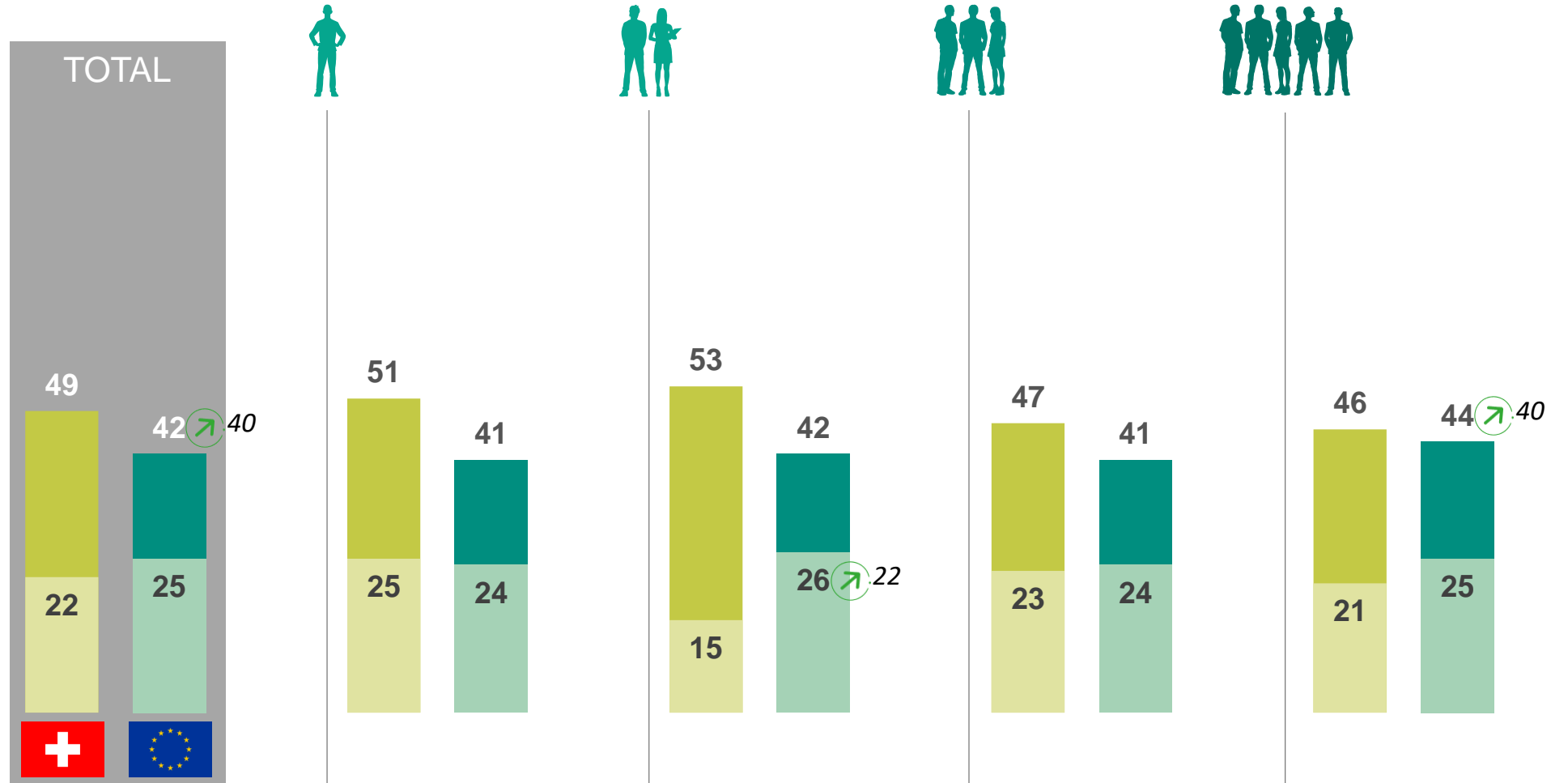
Passenger cars



ALREADY USING
OR CONSIDER
USING IN THE
NEXT 3 YEARS



ALREADY
USING



100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %



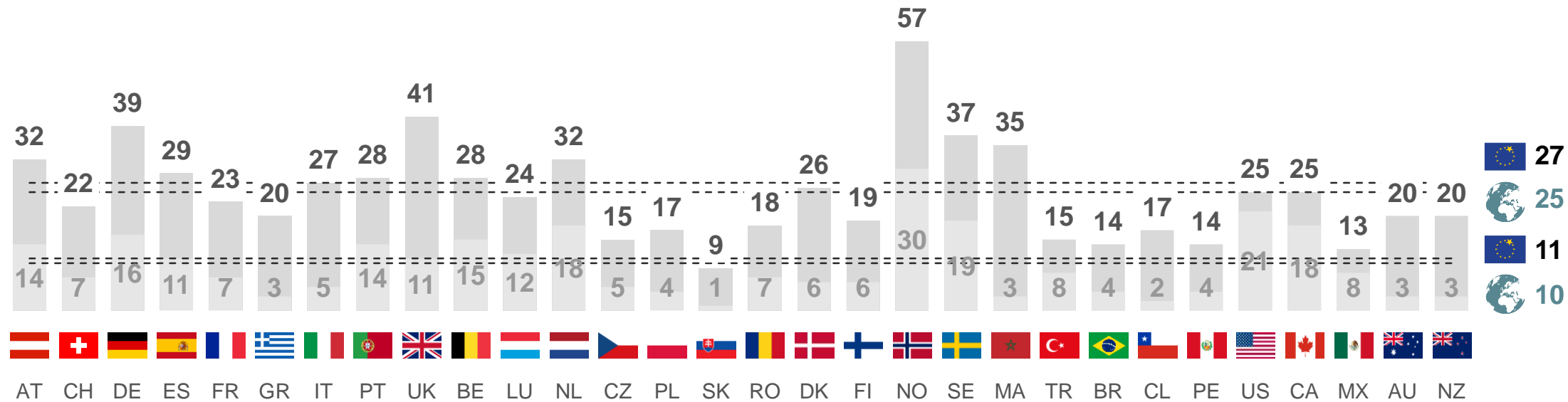
LCVs



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



EU 27

World 25

EU 11

World 10

100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %



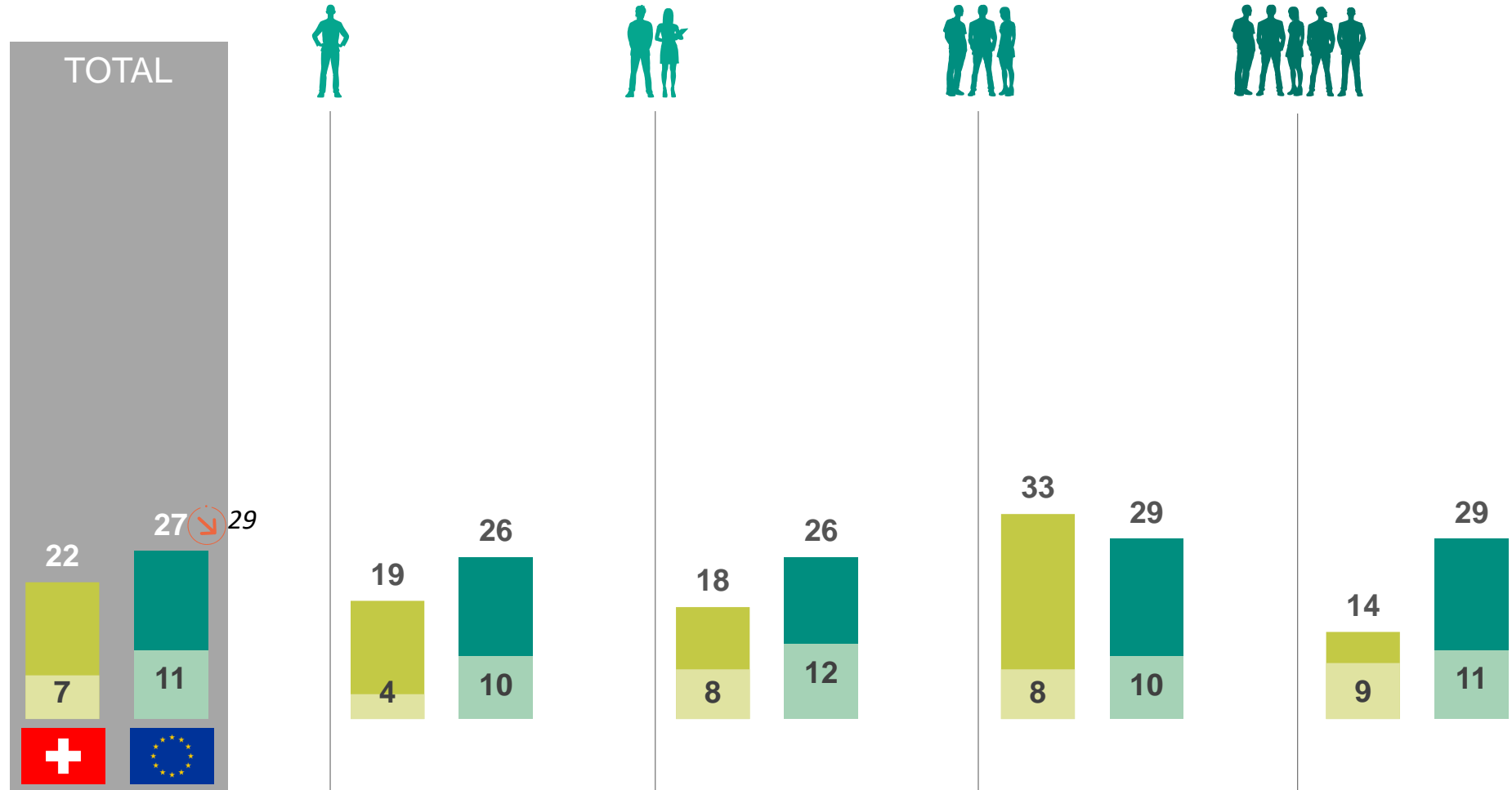
LCVs



ALREADY USING
OR CONSIDER
USING IN THE
NEXT 3 YEARS



ALREADY
USING



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

Basis: companies with LCVs

HYDROGEN FUEL CELL ELECTRIC VEHICLE : IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %



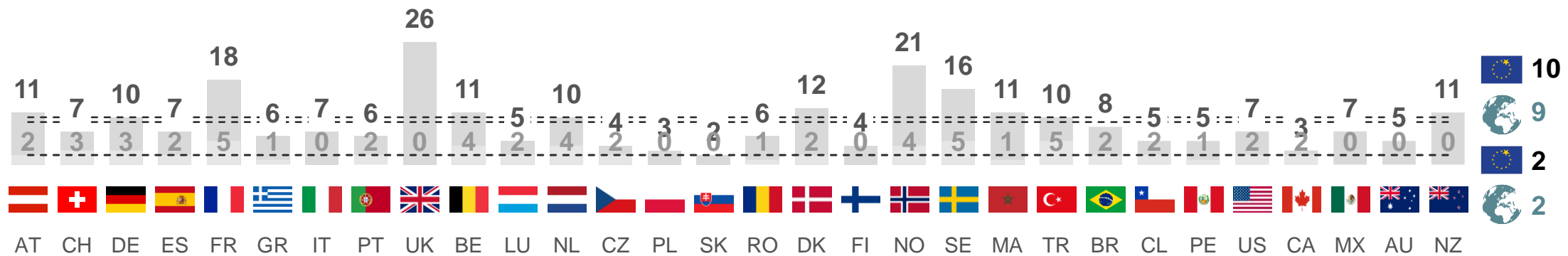
LCVs



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



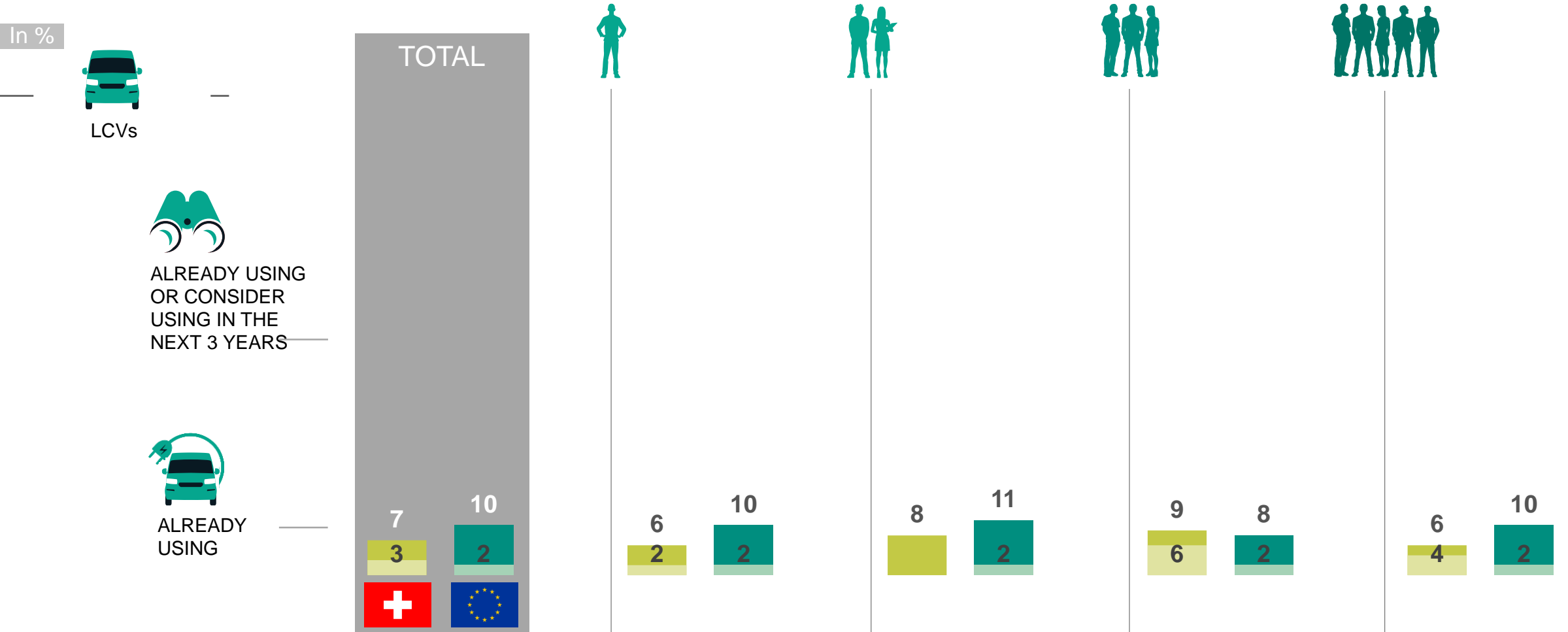
ALREADY
USING



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

Basis: companies with LCVs

HYDROGEN FUEL CELL ELECTRIC VEHICLE : IMPLEMENTATION WITHIN COMPANY FLEET POLICY



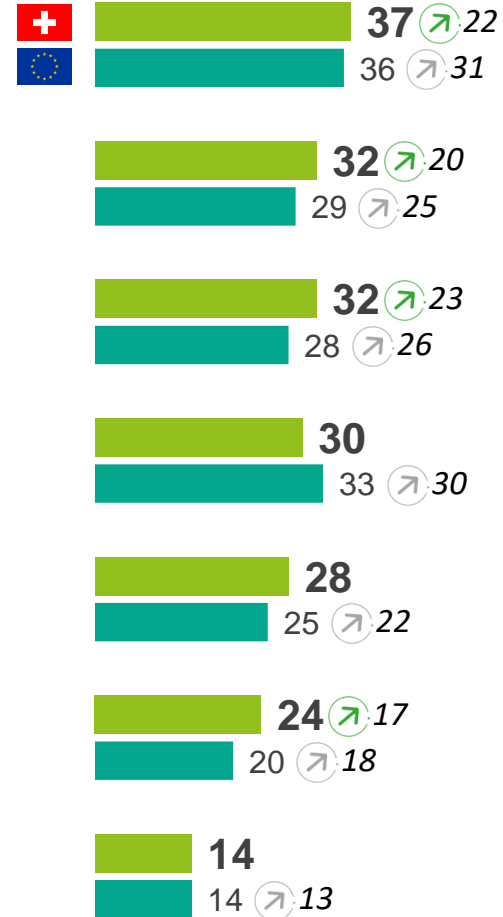
CONSTRAINTS OF 100% BATTERY ELECTRIC VEHICLE USAGE

In %



Passenger cars + LCVs

- Not enough public charging points
- No charging solutions at your employees' home
- No charging points at your company offices
- The purchase price is higher than a regular fuel car
- The range of models is limited for this type of vehicles
- The questions raised on their reliability
- Your employee's reluctance to drive electric vehicles



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

CONSTRAINTS OF 100% BATTERY ELECTRIC VEHICLE USAGE

In %



Passenger cars + LCVs

do not consider implementing battery electric vehicles



24

44

57

Not enough public charging points

No charging solutions at your employees' home

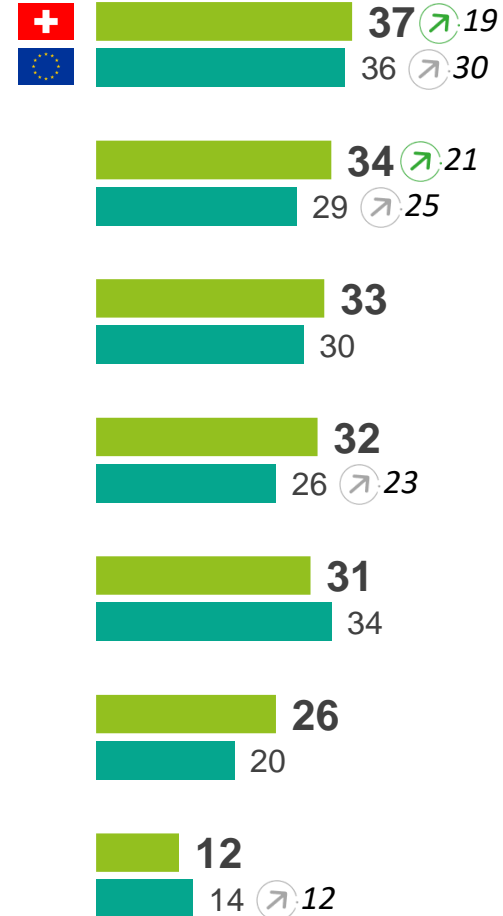
No charging points at your company offices

The range of models is limited for this type of vehicles

The purchase price is higher than a regular fuel car

The questions raised on their reliability

Your employee's reluctance to drive electric vehicles



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

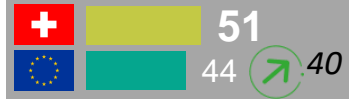
ACCESS TO CHARGING POINTS

In %

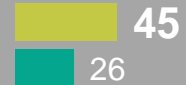


Passenger cars + LCVs

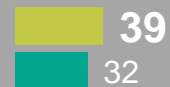
Currently no charging points installed at the company premises



Drivers have to pay for home installation of charging points



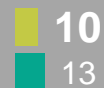
Charging points are planned to be installed at the company premises in the next 12 months



Company subsidises cost of home installations of charging points for drivers



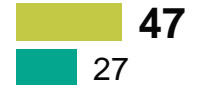
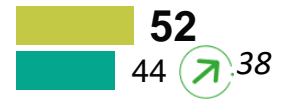
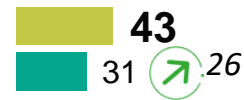
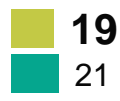
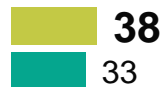
Charging points installed at the company premises and free charging for drivers



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



TOTAL



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

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

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

CHARGING POINT ACCESS MANAGEMENT

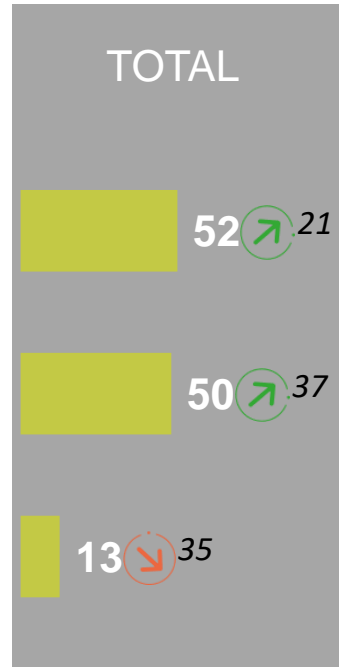
73%

Of companies are using or consider using in the next three years BEV or PHEV in their fleet of passenger cars or BEV in their fleet of LCVs

In %



Passenger cars + LCVs



Don't know

11



12



15



10



5

We use public charging points

52 ↑21

53 ↑21

52 ↑16

47 ↑20

55

We have already installed or are going to install charging points in our company's offices

50 ↑37

54 ↑33

44

52

49

We don't plan to install charging points, because we use lump sum payments

13 ↓35

9 ↓38

10 ↓31

14 ↓33

18

How do you manage the charging point solutions in your company?

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

Several answers possible: % don't add up to 100%

DRIVER SUPPORT FOR CHARGING POINT INSTALLATION

73%

Of companies are using or consider using in the next three years BEV or PHEV in their fleet of passenger cars or BEV in their fleet of LCVs

In %



Passenger cars + LCVs

TOTAL

NET Yes



Yes, you are in charge of the complete installation and give a complete finance support for the charging boxes



Yes, you use lump sum payments



No, this is owed by driver with no finance support



Don't know



8

5

5

Do you support your drivers for charging points installation?
Basis: companies already using or considering BEV/PHEV for passenger cars or BEV for LCV

6

WHAT ARE THE PERSPECTIVES IN TERMS OF MOBILITY SOLUTIONS?



MOBILITY SOLUTIONS



TOP 3 USED SOLUTIONS

#1 Ride sharing: where several employees travel in the same car to the same destination



29%



18%

#2 Public transport

23%

23% ²¹

#3 Car or cash allowance

22%

17%



TOP 3 POTENTIAL NEXT 3 YEARS

#1 Ride sharing: where several employees travel in the same car to the same destination



36%



28%

#2 Corporate car sharing: where an employee can make a vehicle reservation via an external solution

32%

21%

#3 Car or cash allowance

32%

27%



RIDE SHARING LEADS ON MOBILITY SOLUTIONS ADOPTION OVERALL

1

- Adoption of mobility solutions is stable and on par with the European average (81% vs 79%).

Ride sharing is the solution adopted the most often (29%), and also the one benefiting from the highest growth potential (36%). Public transport (23%), car/cash allowance (22%) and corporate car sharing (21%) are somehow distanced, tied #2 and showing the same level of development potential too (32%).

Mobility budget is rather marginal, being adopted by 1 out of 10 companies. Its adoption is driven by mobility costs lowering and for supporting the employees in their wish for more options and flexibility in relation to mobility.

To note, corporate car sharing leads on adoption potential among <100 employees companies whereas >100 employees companies rank car/cash allowance on #1 position.

2

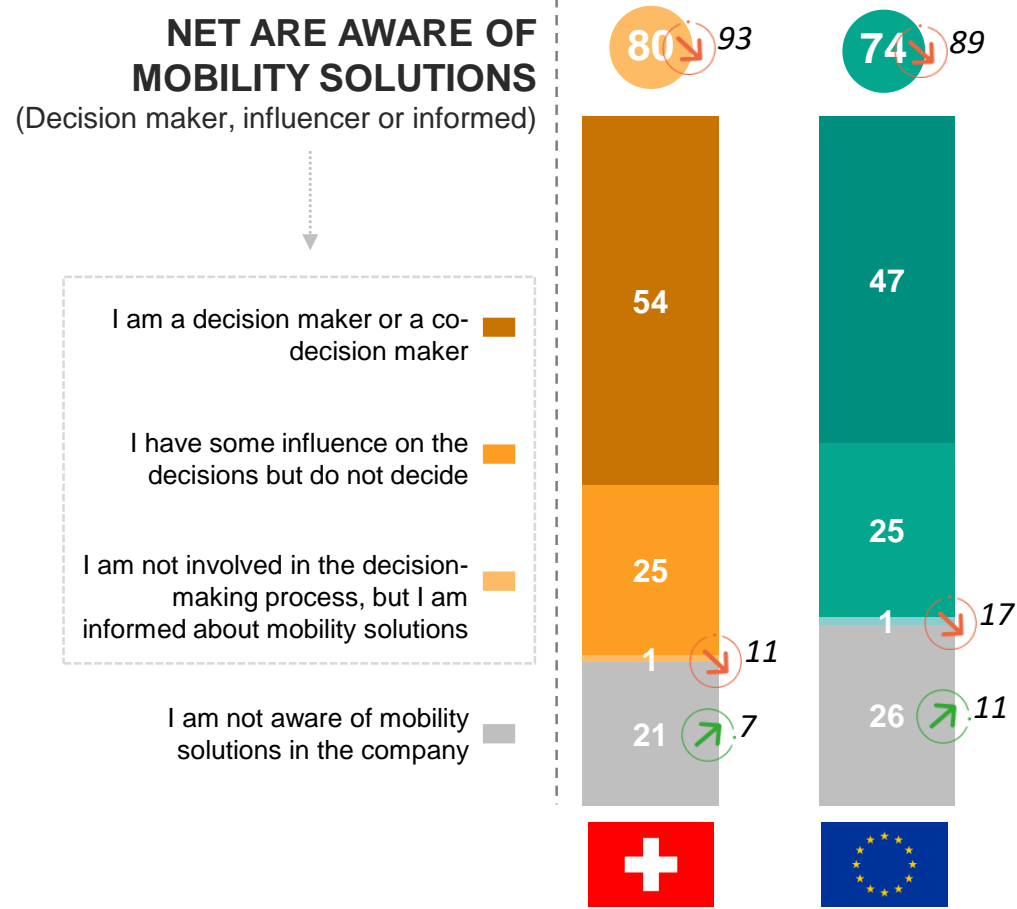
- **HR related needs (talent recruitment, employees retainment), CSR policies and company attractiveness are the main drivers** of the adoption of mobility solutions – in line with the European picture.

3

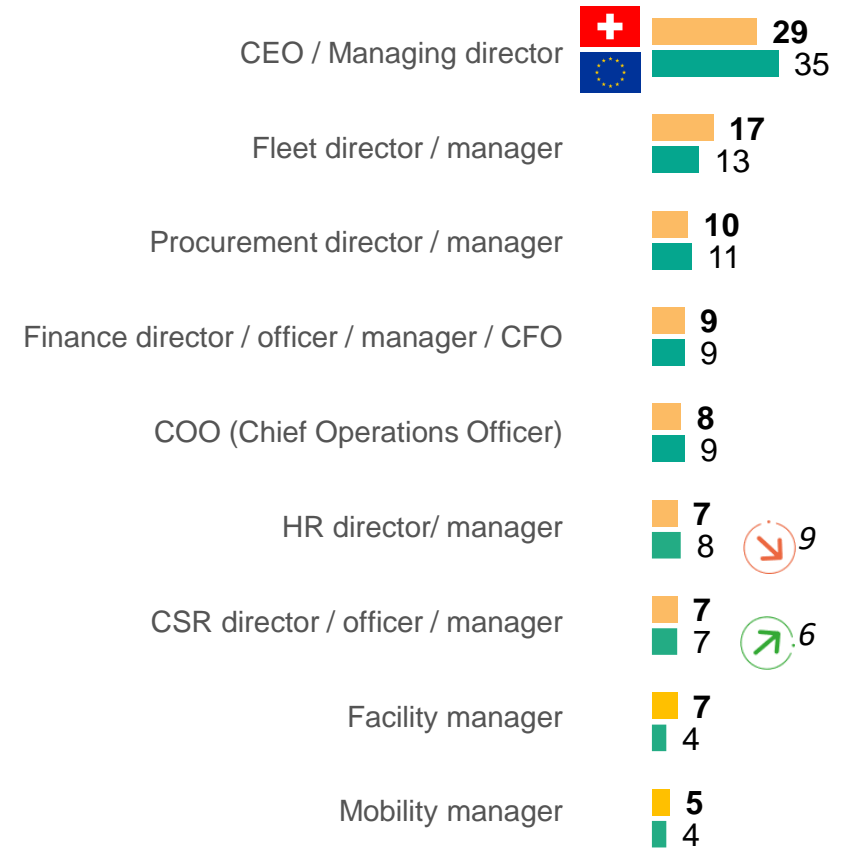
- Overall, **mobility solutions are perceived more as add-ons to the vehicle fleets,** their adoption showing a limited impact on the sizes of the latter.

MOBILITY SOLUTION DECISION MAKERS

RESPONDENTS INVOLVEMENT IN MOBILITY SOLUTION DECISIONS



POSITION OF THE PERSON WHO DECIDES ON MOBILITY SOLUTIONS



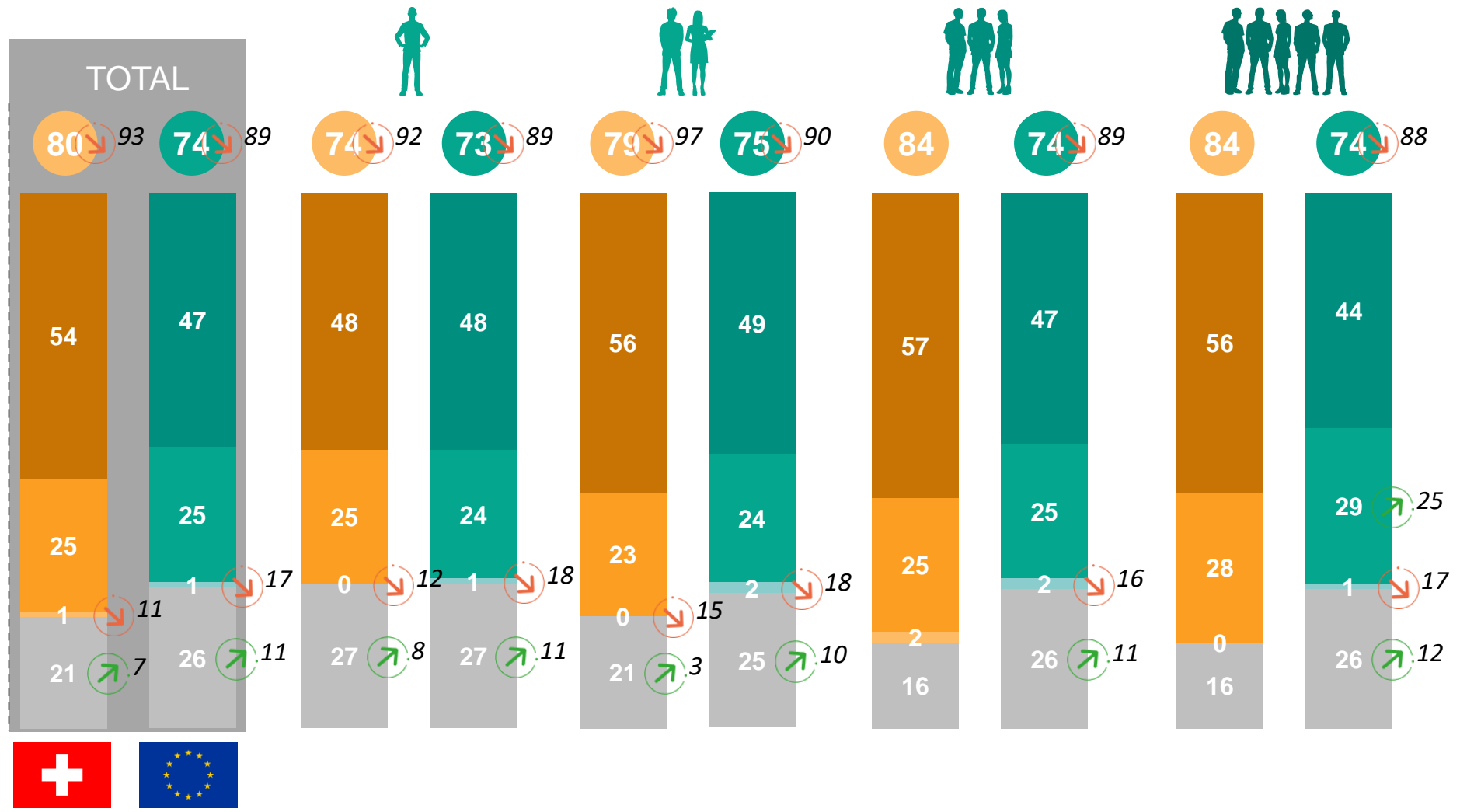
RESPONDENTS INVOLVEMENT IN MOBILITY SOLUTION DECISIONS

In %

NET ARE AWARE OF MOBILITY SOLUTIONS

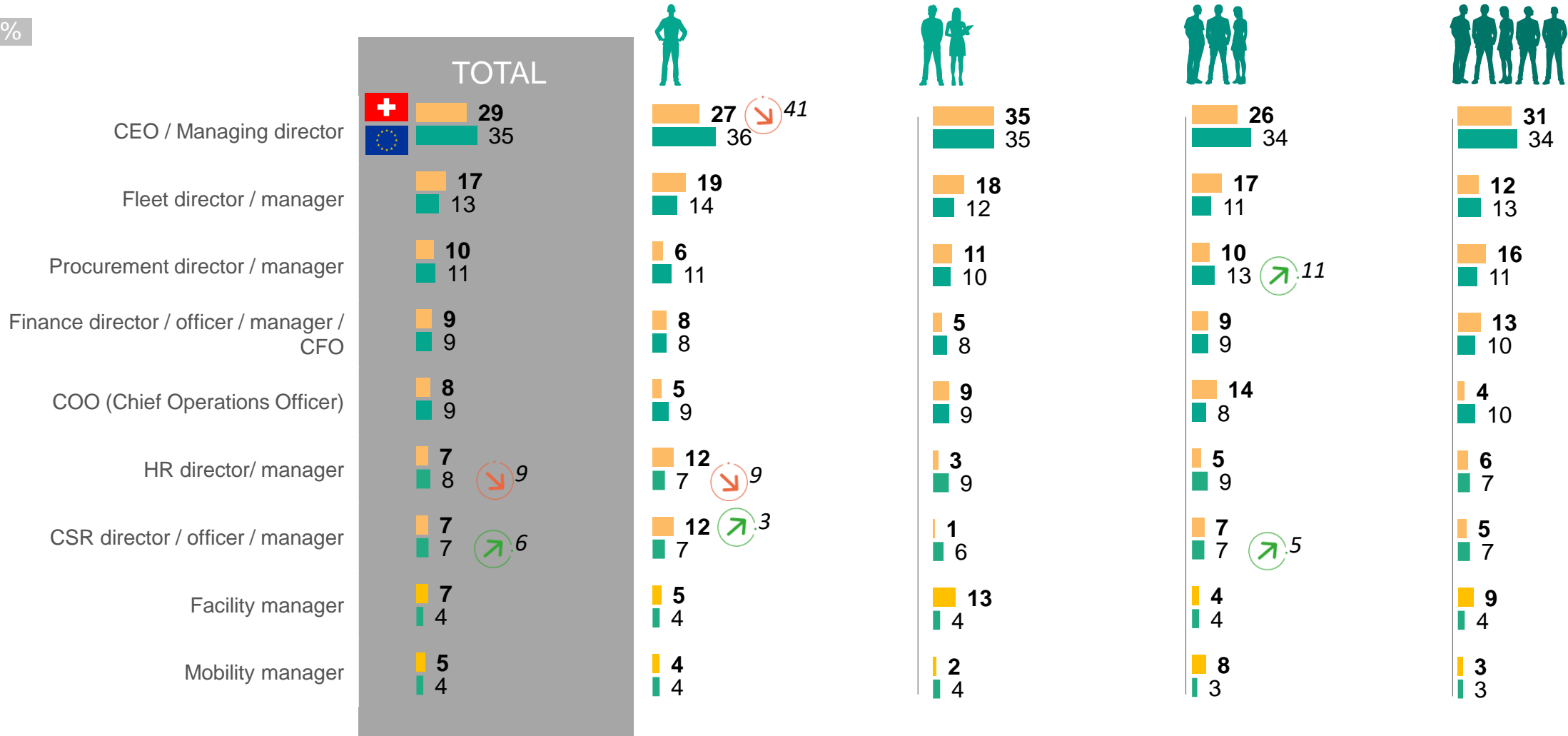
(Decision maker, influencer or informed)

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



POSITION OF THE PERSON WHO DECIDES ON MOBILITY SOLUTIONS

In %



MOBILITY SOLUTIONS LIST AND DEFINITIONS



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



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



RIDE SHARING: where several employees travel in the same car to the same destination



AN APP PROVIDED BY THE COMPANY TO BOOK MOBILITY SOLUTIONS



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



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



PUBLIC TRANSPORT



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



CAR OR CASH ALLOWANCE

MOBILITY SOLUTIONS IMPLEMENTATION

At least one already implemented

List of the alternative mobility solutions:

- CORPORATE CAR SHARING
- RIDE SHARING (except AU, CA, NZ, US)
- BIKE SHARING / BIKE LEASING
- PUBLIC TRANSPORT
- MOBILITY BUDGET
- AN APP PROVIDED BY THE COMPANY TO BOOK MOBILITY SOLUTIONS
- PRIVATE LEASE OR SALARY SACRIFICE
- A SHORT OR MID TERM RENTAL VEHICLE
- CAR OR CASH ALLOWANCE (except BE)

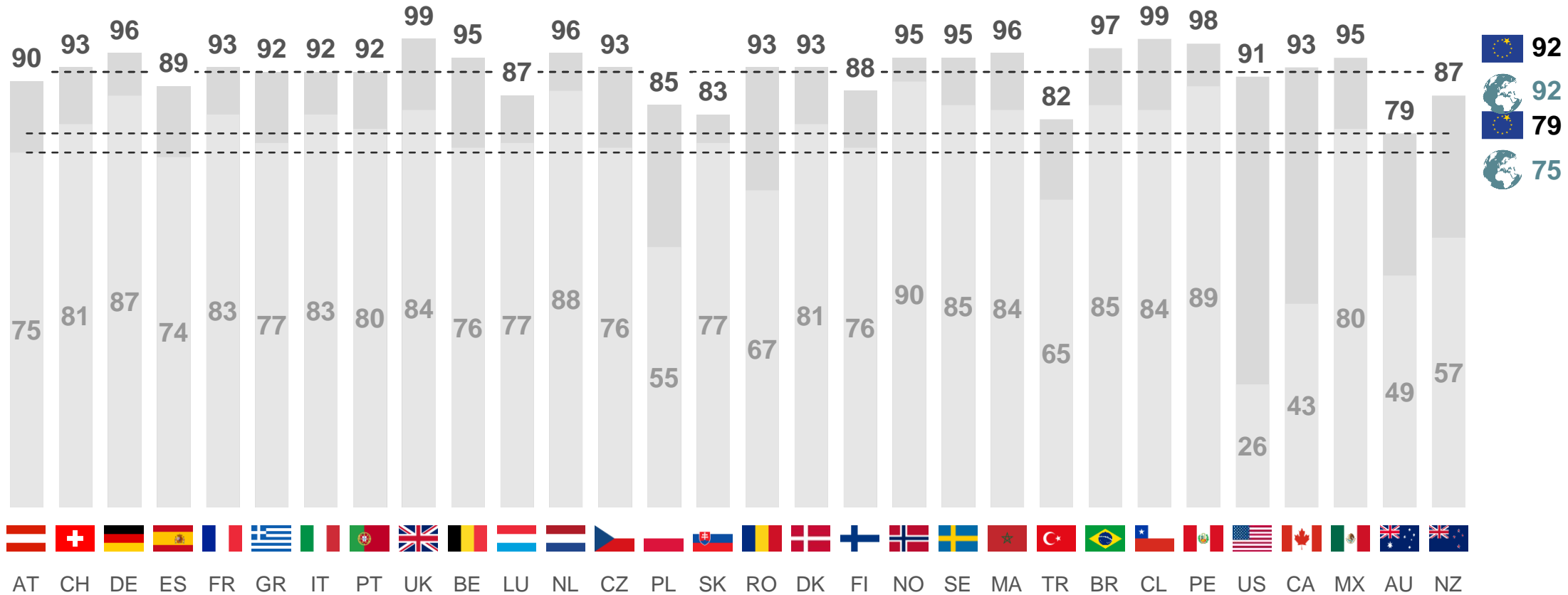
In %



ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS



ALREADY USING



92
 92
 79
 75

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

MOBILITY SOLUTIONS IMPLEMENTATION

At least one already implemented

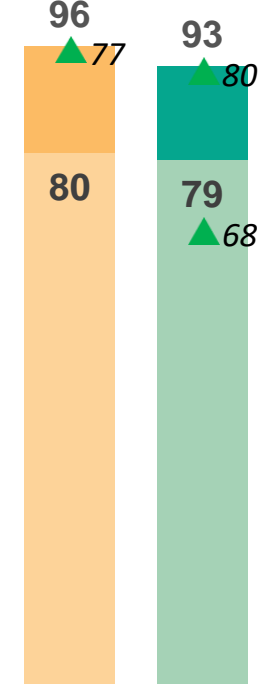
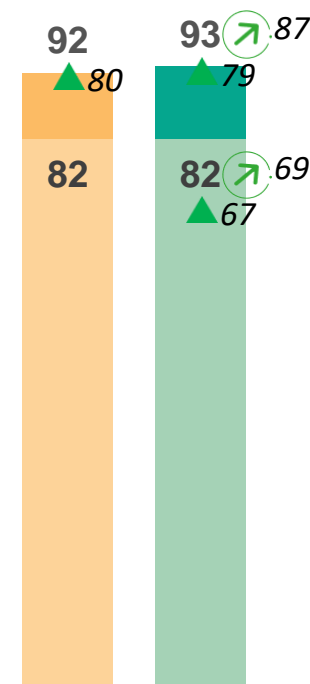
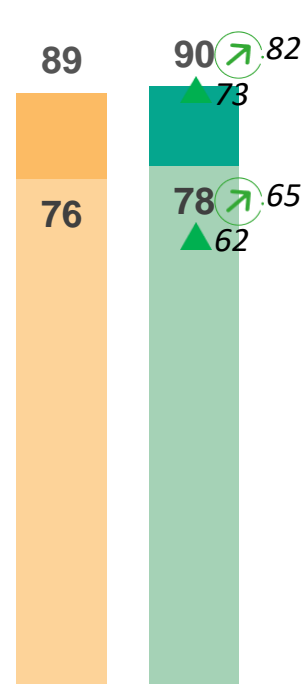
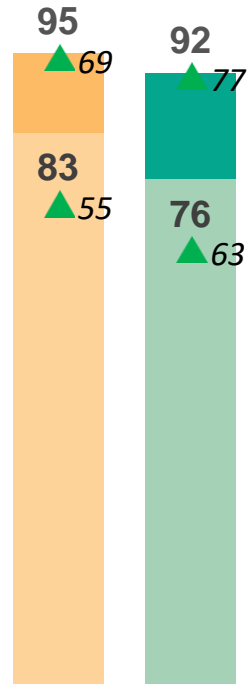
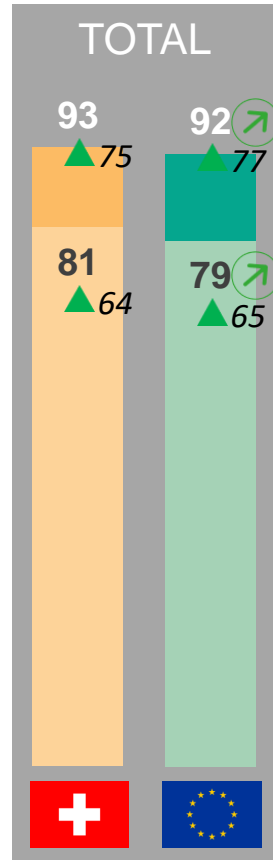
In %



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



Significantly higher than 2023 year

Significantly higher than 2022 year

XX = score 2023 or 2022



Significantly lower than 2023 year

Significantly lower than 2022 year

XX = score 2023 or 2022

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

OVERVIEW OF MOBILITY SOLUTIONS IMPLEMENTATION

In %

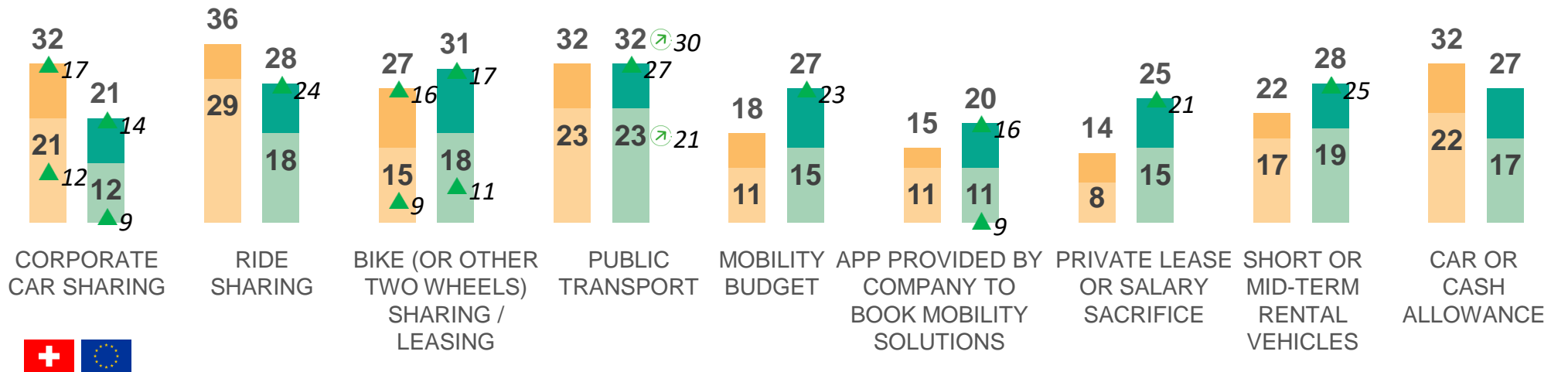
81% Of companies have already implemented at least one of these solutions



ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS



ALREADY USING



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

Question asked to respondents that are aware of mobility solutions

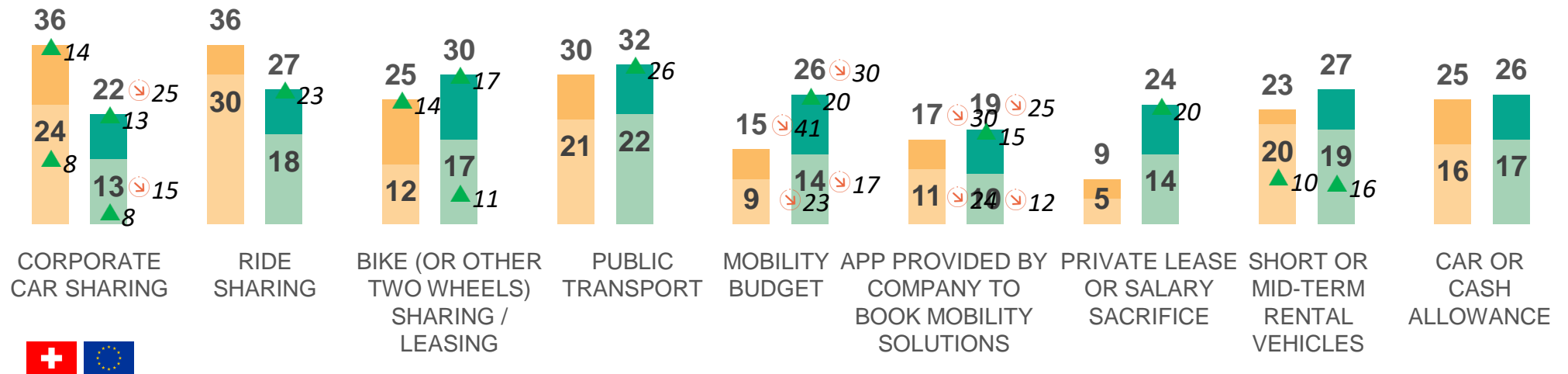
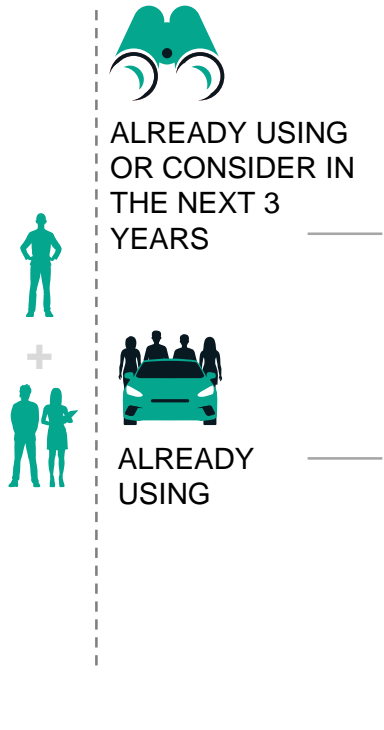
OVERVIEW OF MOBILITY SOLUTIONS IMPLEMENTATION

Focus on 1 to 99

80%

Of companies have already implemented at least one of these solutions

In %



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

Question asked to respondents that are aware of mobility solutions

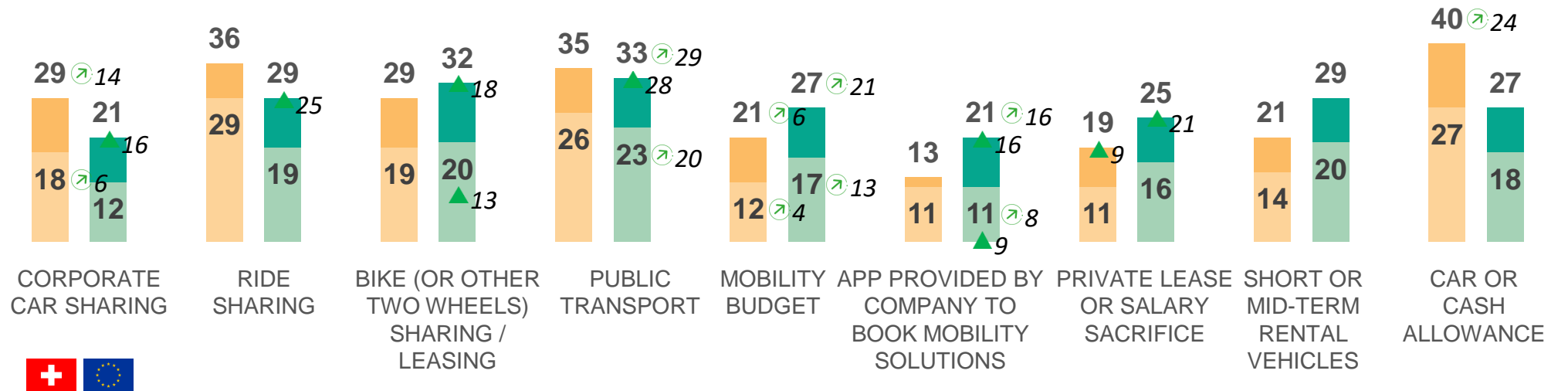
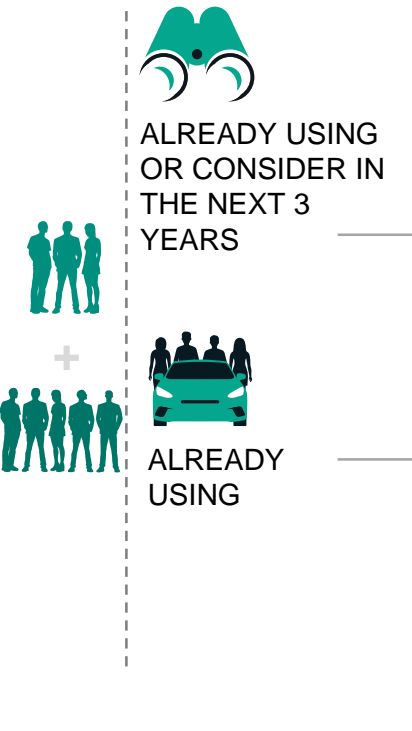
OVERVIEW OF MOBILITY SOLUTIONS IMPLEMENTATION

Focus on 100 and more

81%

Of companies have already implemented at least one of these solutions

In %



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

Question asked to respondents that are aware of mobility solutions

CORPORATE CAR SHARING IMPLEMENTATION

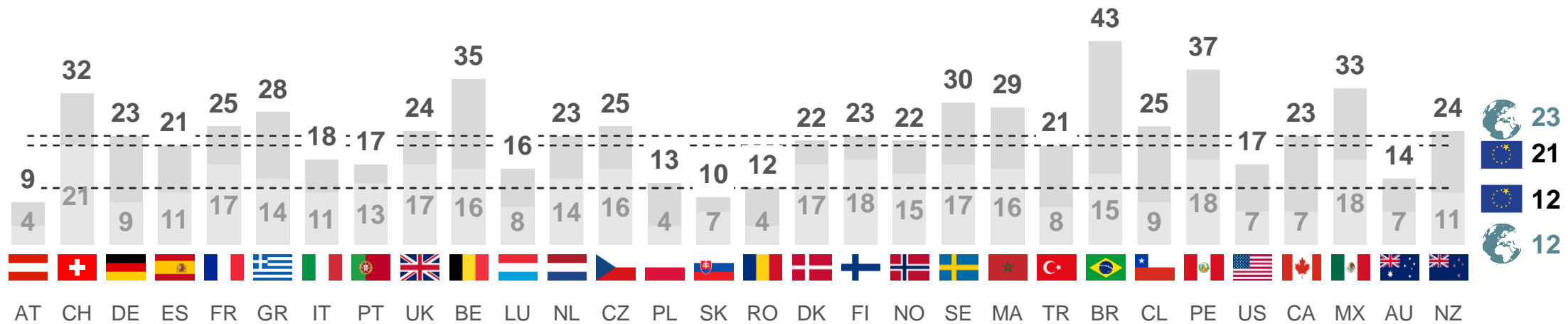
In %



ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS



ALREADY USING



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

CORPORATE CAR SHARING IMPLEMENTATION

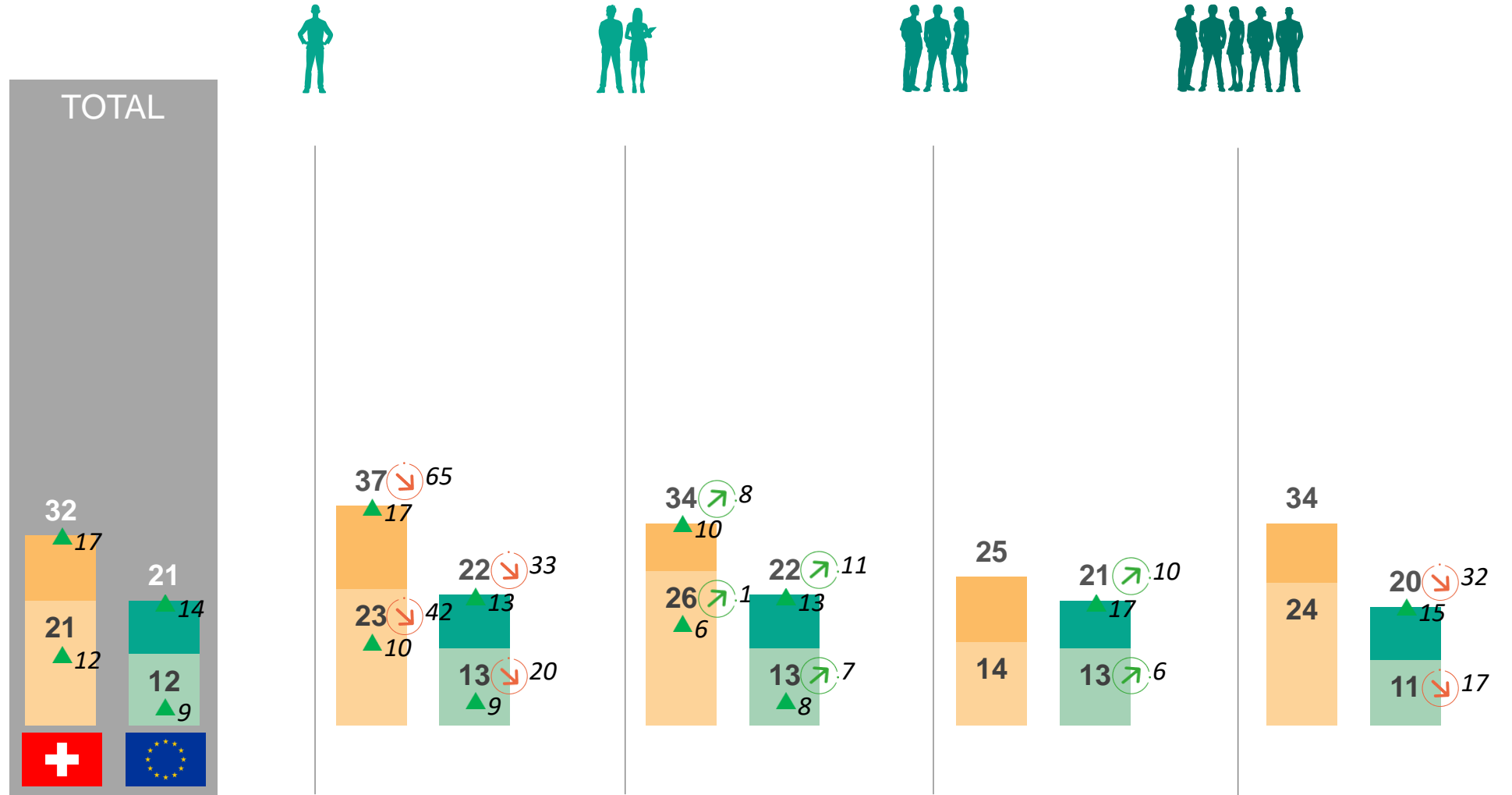
In %



ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS



ALREADY USING



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

RIDE SHARING IMPLEMENTATION

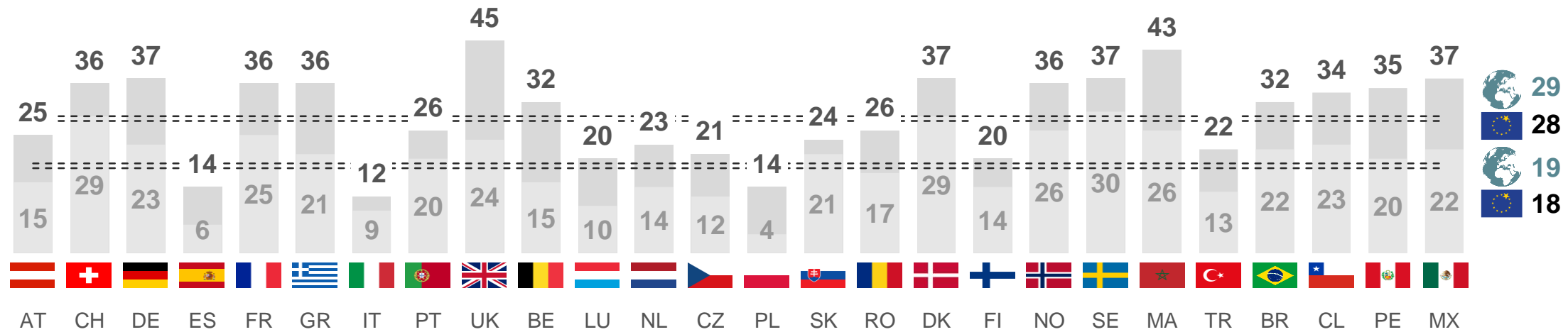
In %



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



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

RIDE SHARING IMPLEMENTATION

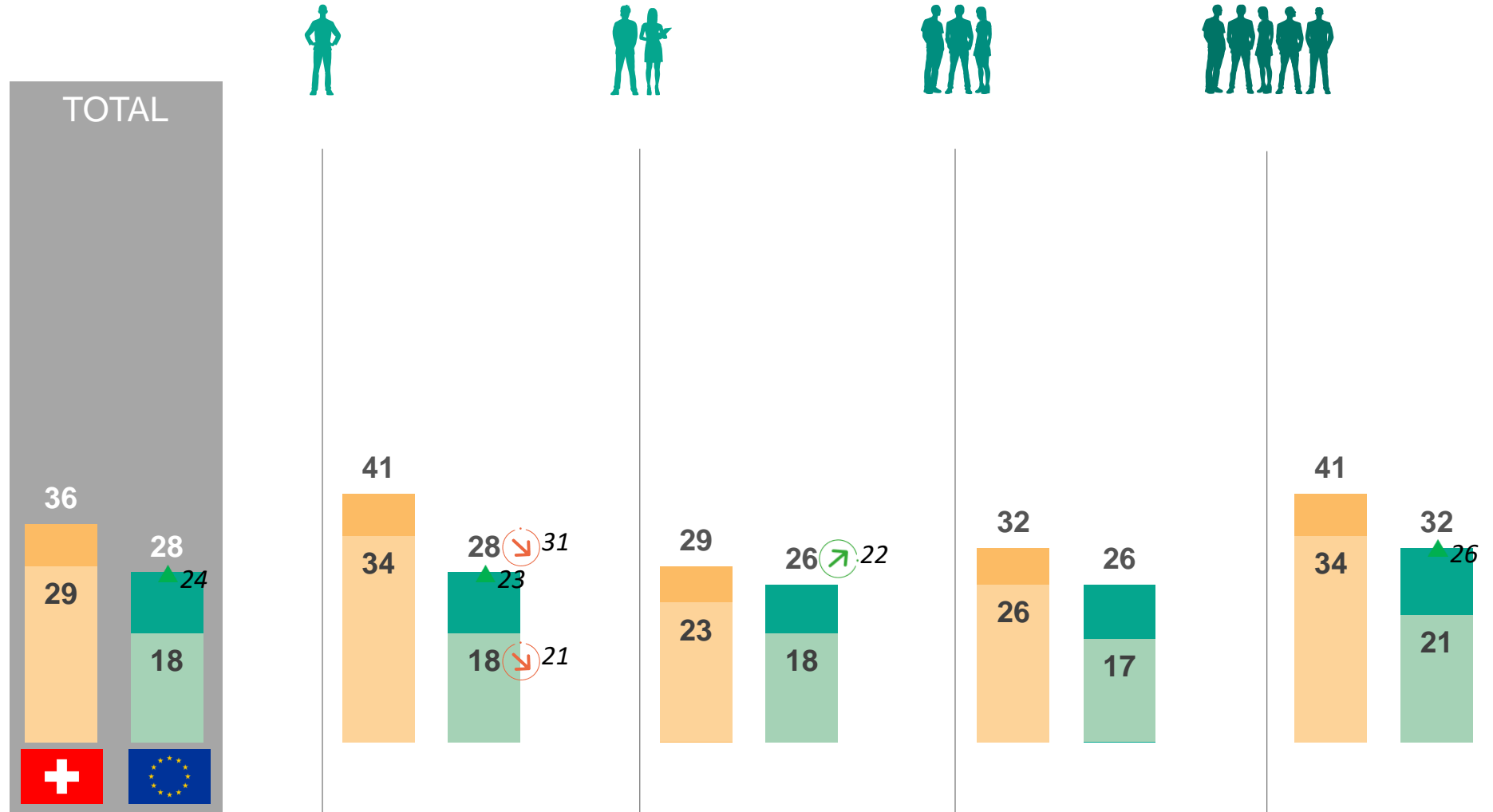
In %



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



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

BIKE (OR OTHER TWO WHEELS) SHARING / LEASING IMPLEMENTATION

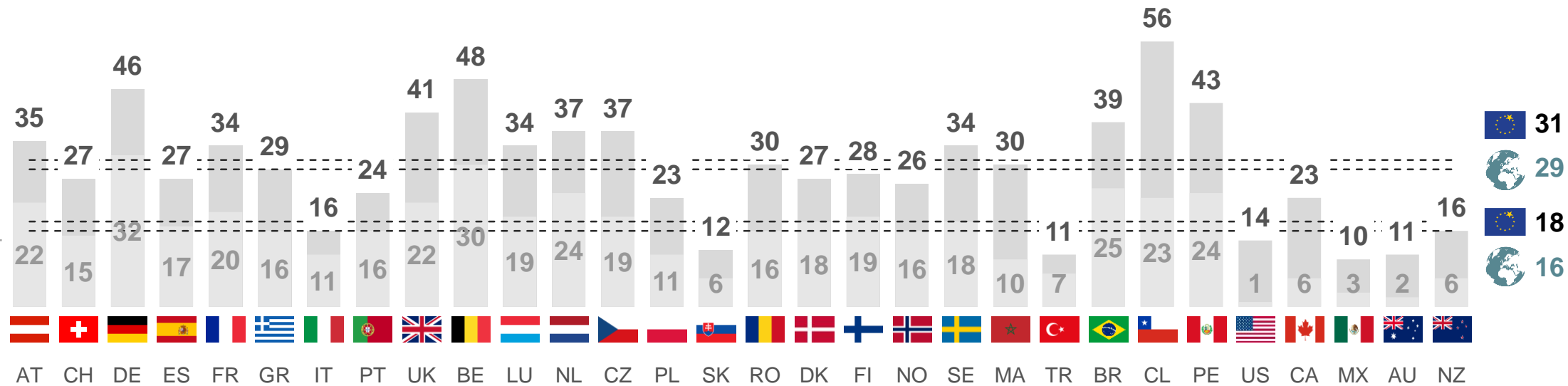
In %



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



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

BIKE (OR OTHER TWO WHEELS) SHARING / LEASING IMPLEMENTATION

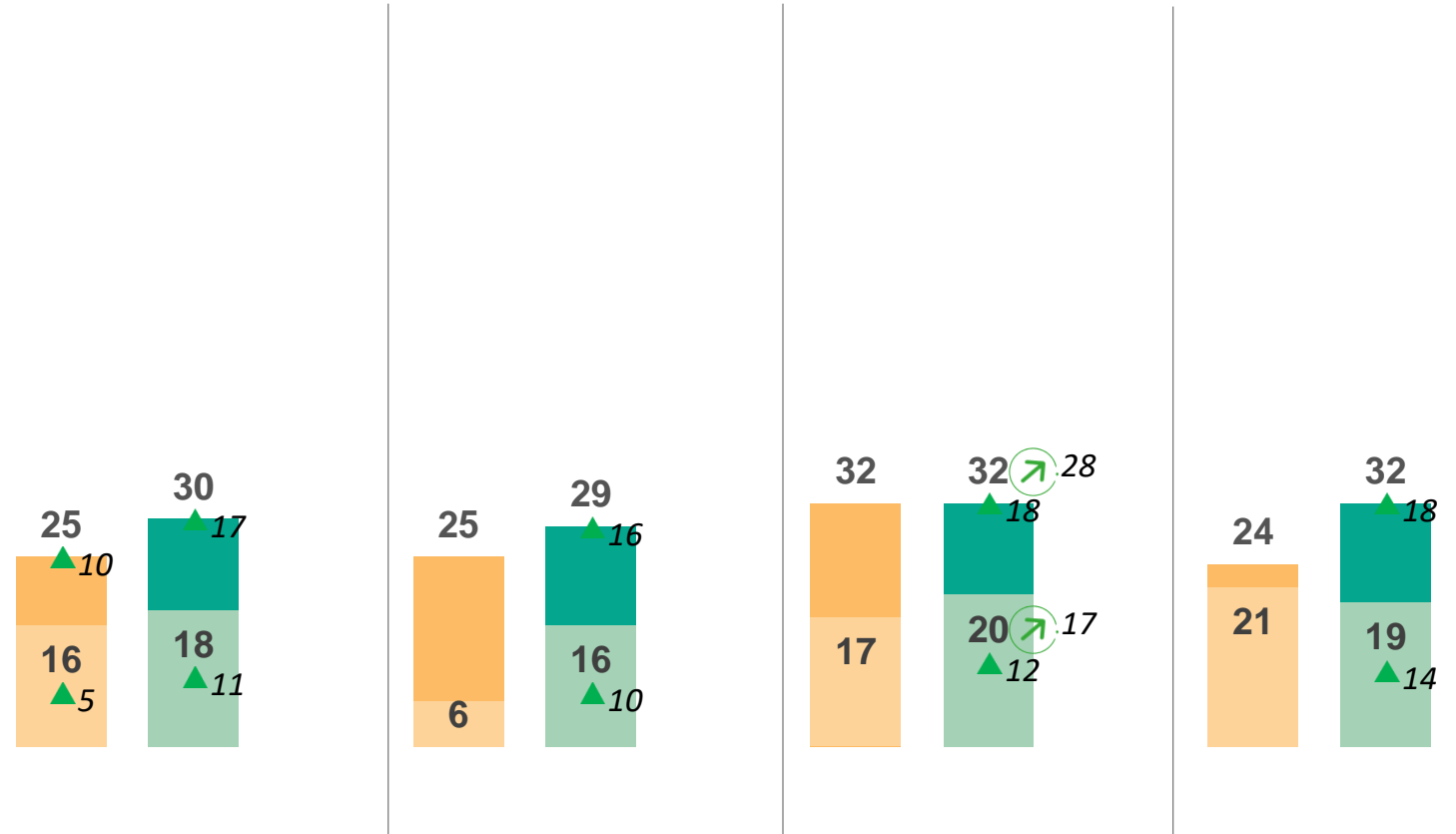
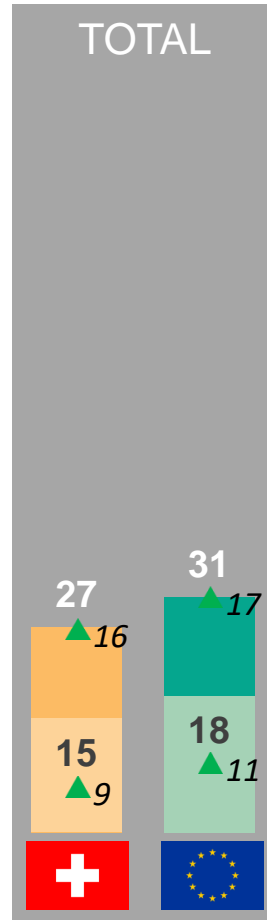
In %



ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS



ALREADY USING



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

PUBLIC TRANSPORT IMPLEMENTATION

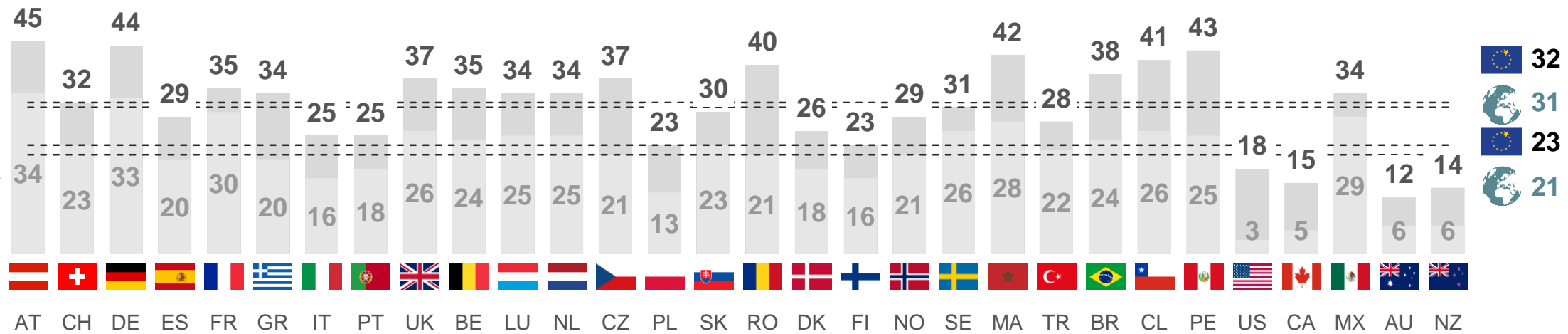
In %



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



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

PUBLIC TRANSPORT IMPLEMENTATION

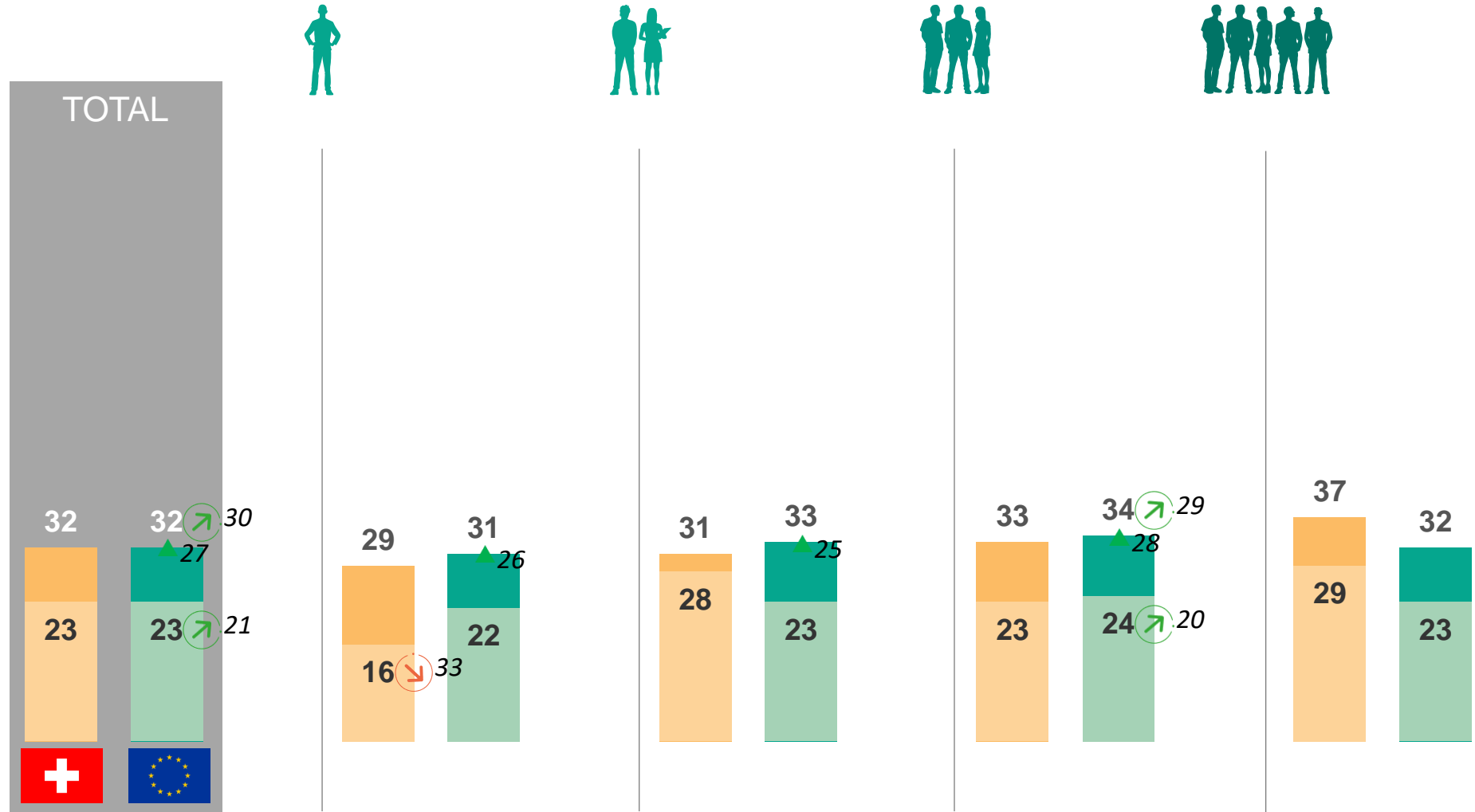
In %



ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS



ALREADY USING



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

MOBILITY BUDGET IMPLEMENTATION

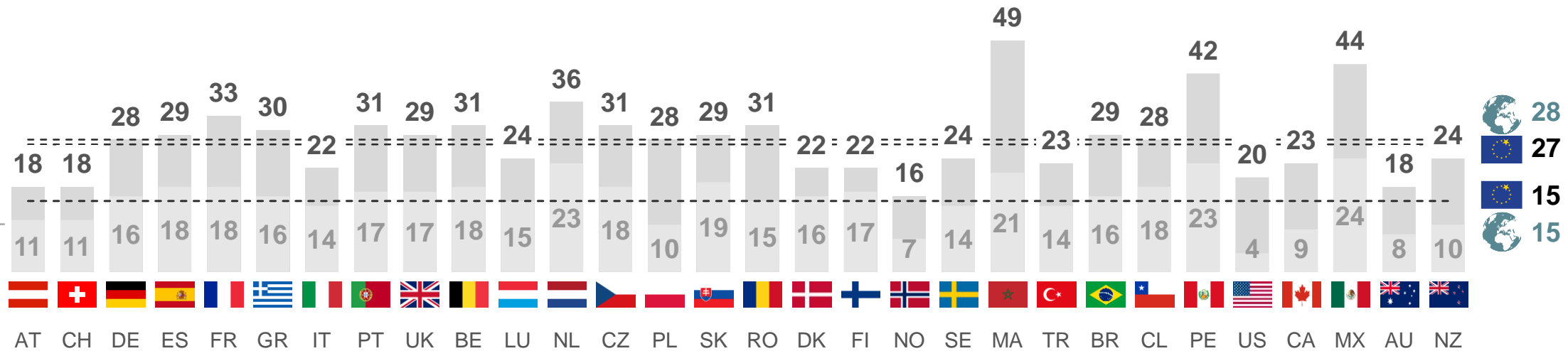
In %



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



28
27
15
15

Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions
123

MOBILITY BUDGET IMPLEMENTATION

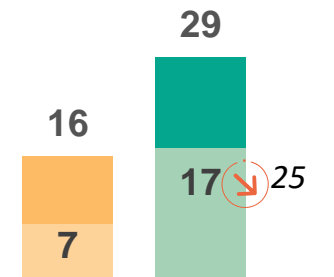
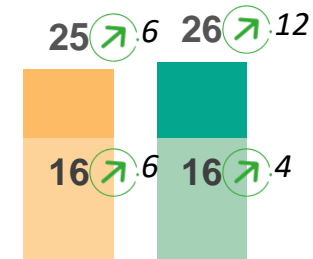
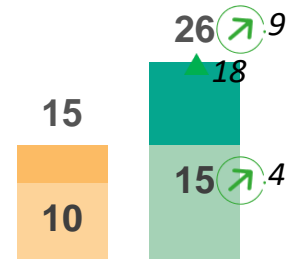
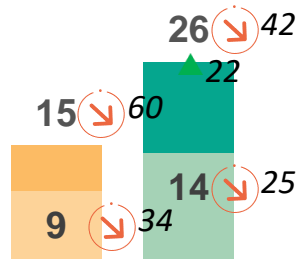
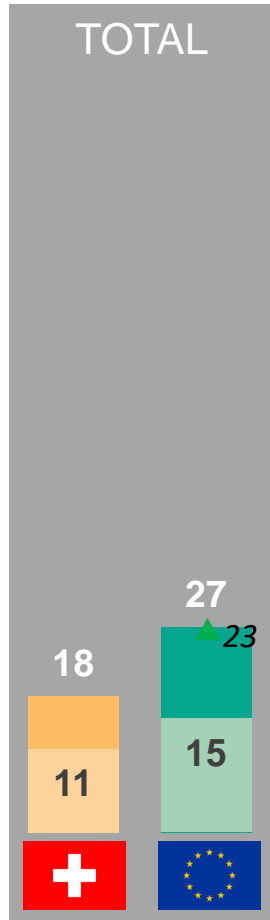
In %



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



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

AN APP PROVIDED BY THE COMPANY TO BOOK MOBILITY SOLUTIONS

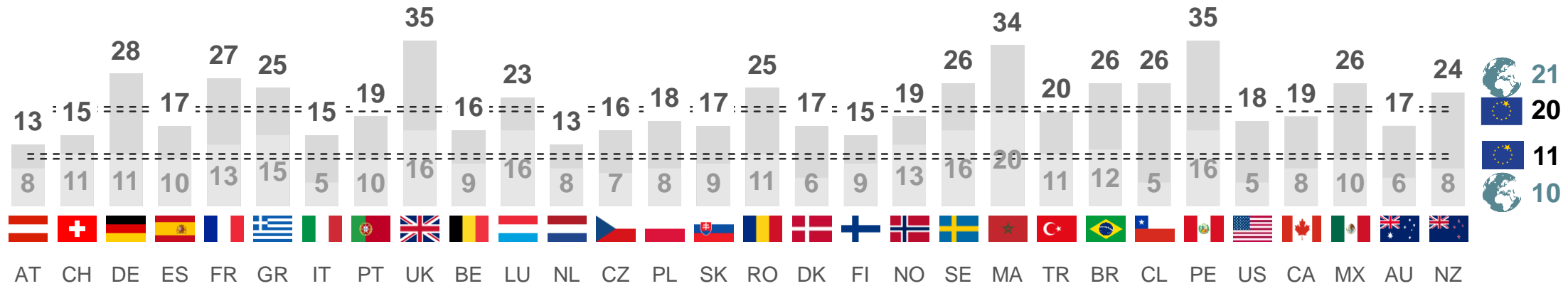
In %



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



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

21
20
11
10

AN APP PROVIDED BY THE COMPANY TO BOOK MOBILITY SOLUTIONS

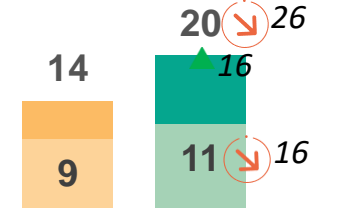
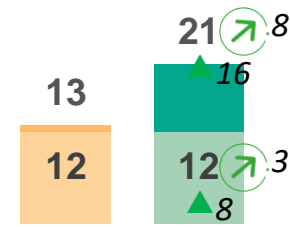
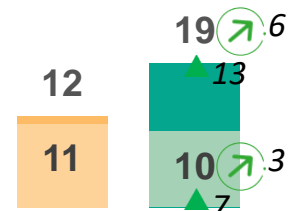
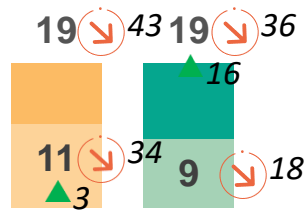
In %



ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS



ALREADY USING



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

PRIVATE LEASE OR SALARY SACRIFICE IMPLEMENTATION

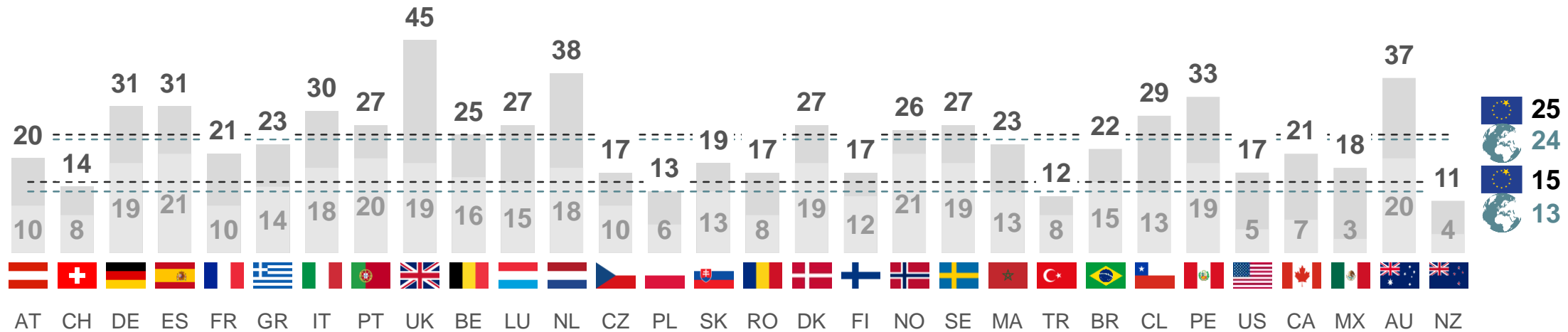
In %



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



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

PRIVATE LEASE OR SALARY SACRIFICE IMPLEMENTATION

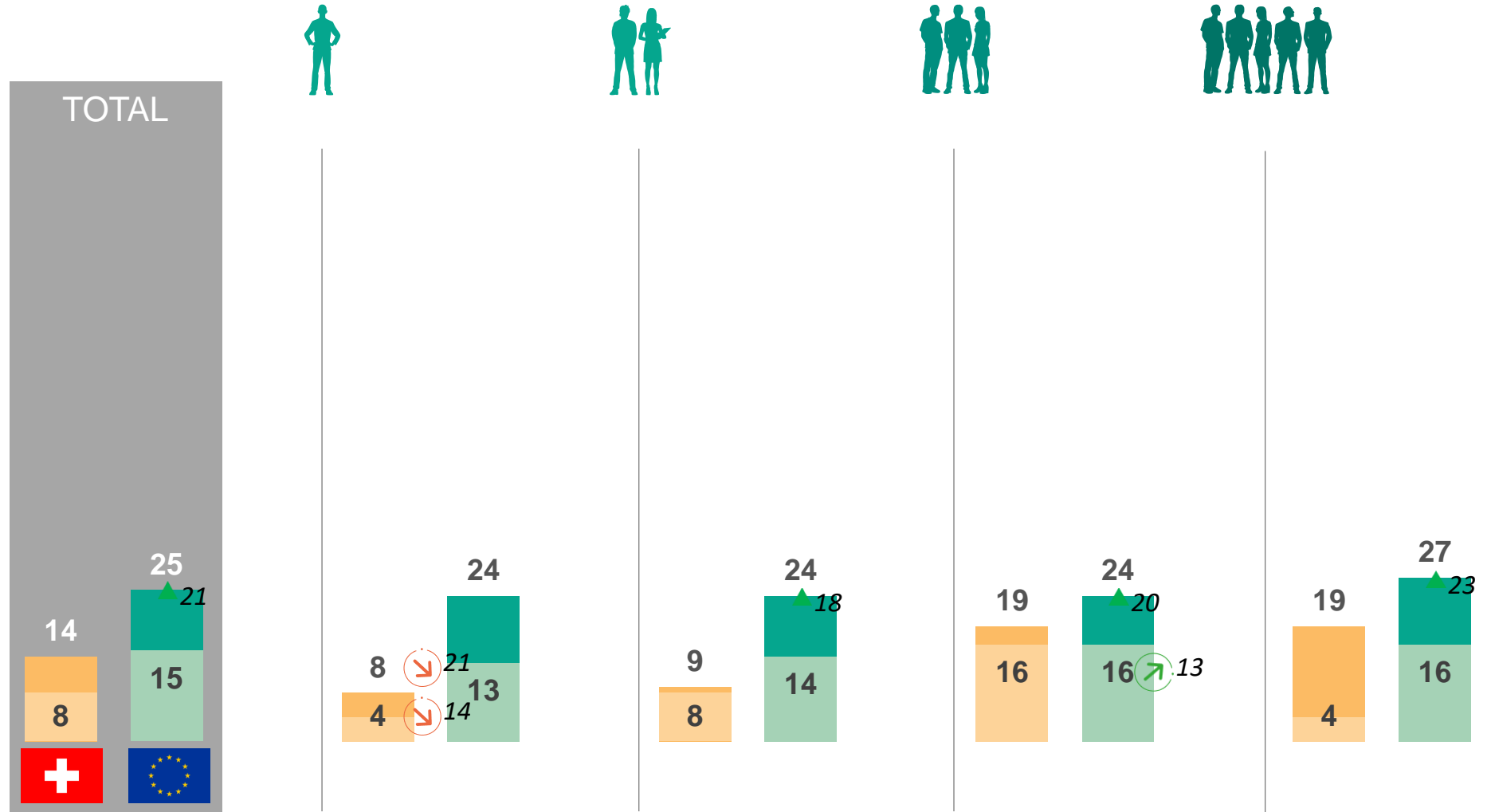
In %



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



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

SHORT OR MID-TERM RENTAL VEHICLES IMPLEMENTATION

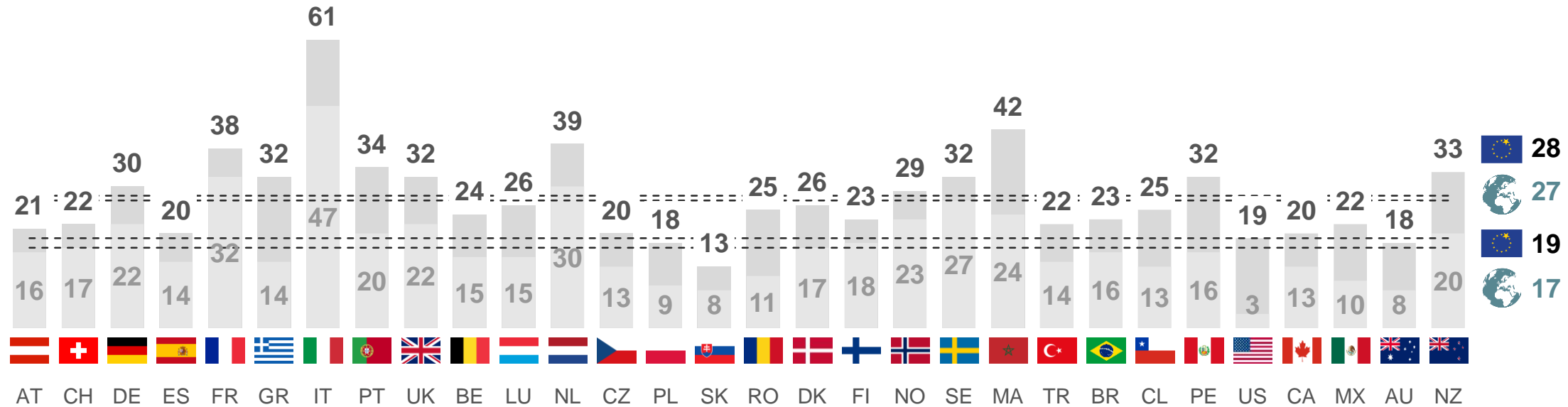
In %



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



Which of the following have you implemented or will you implement in the next 3 years?
 Response scale: Already using, considered in the next 3 years, not interested
 Basis: companies with corporate vehicles = 100%
 Question asked to respondents that are aware of mobility solutions
 129

SHORT OR MID-TERM RENTAL VEHICLES IMPLEMENTATION

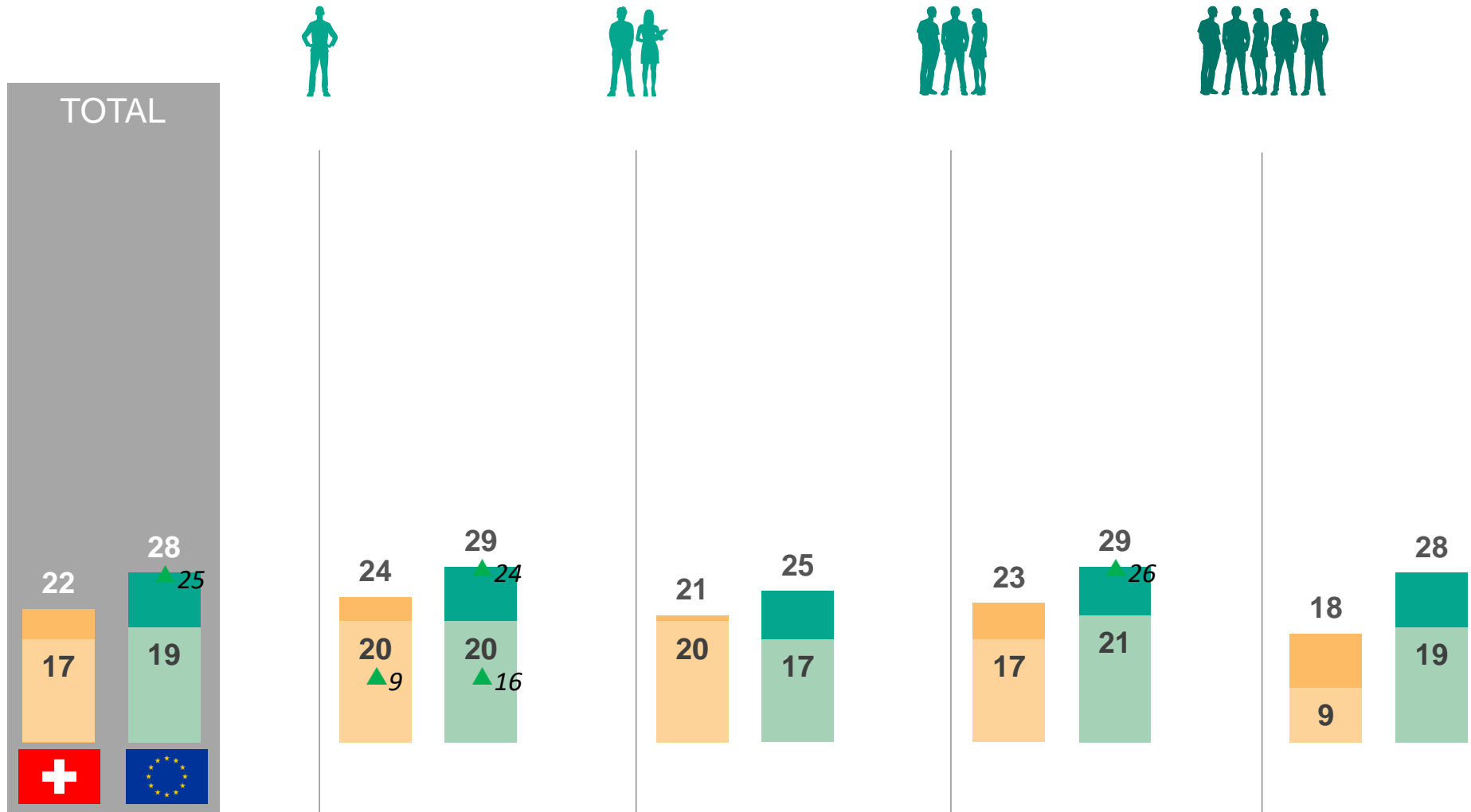
In %



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



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

CAR OR CASH ALLOWANCE IMPLEMENTATION

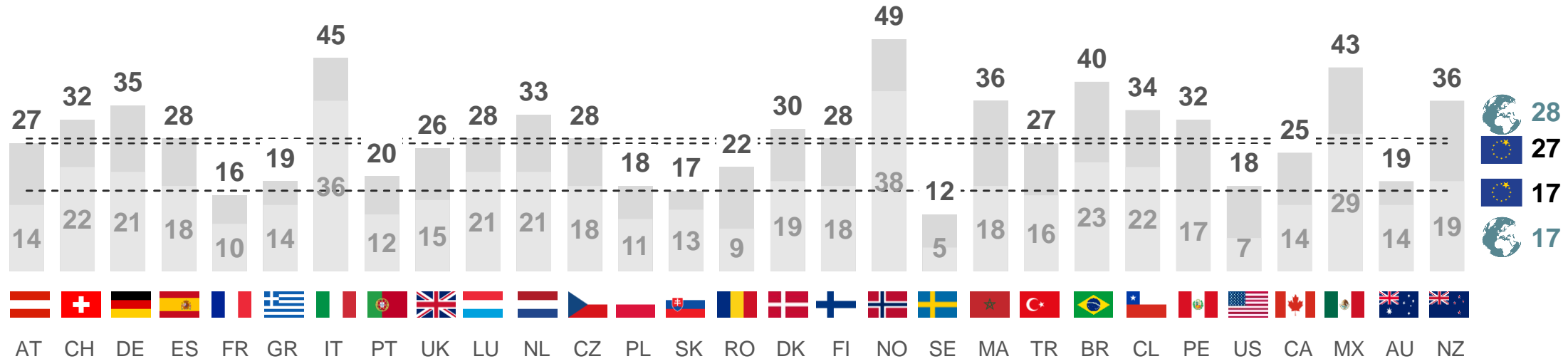
In %



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



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

CAR OR CASH ALLOWANCE IMPLEMENTATION

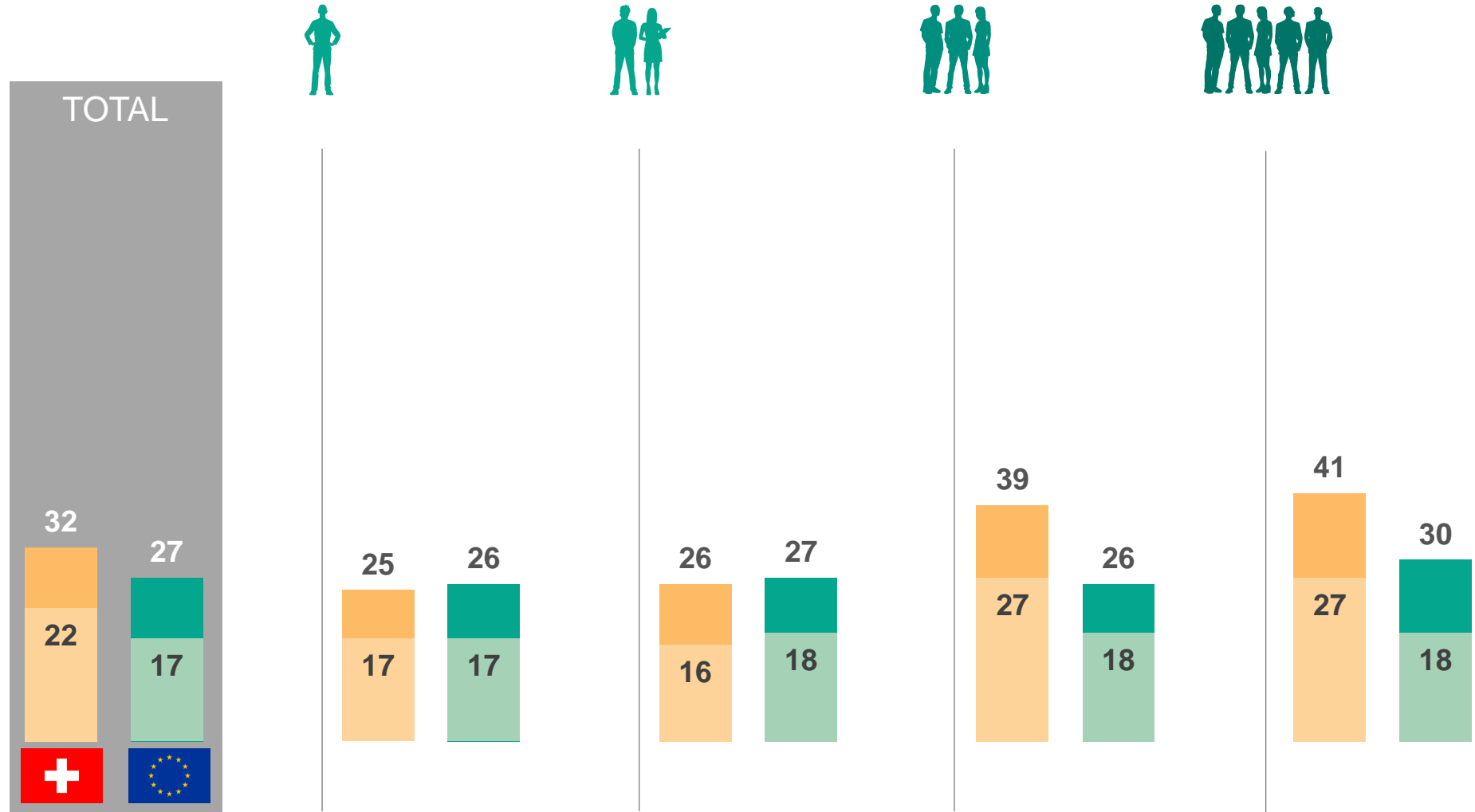
In %



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



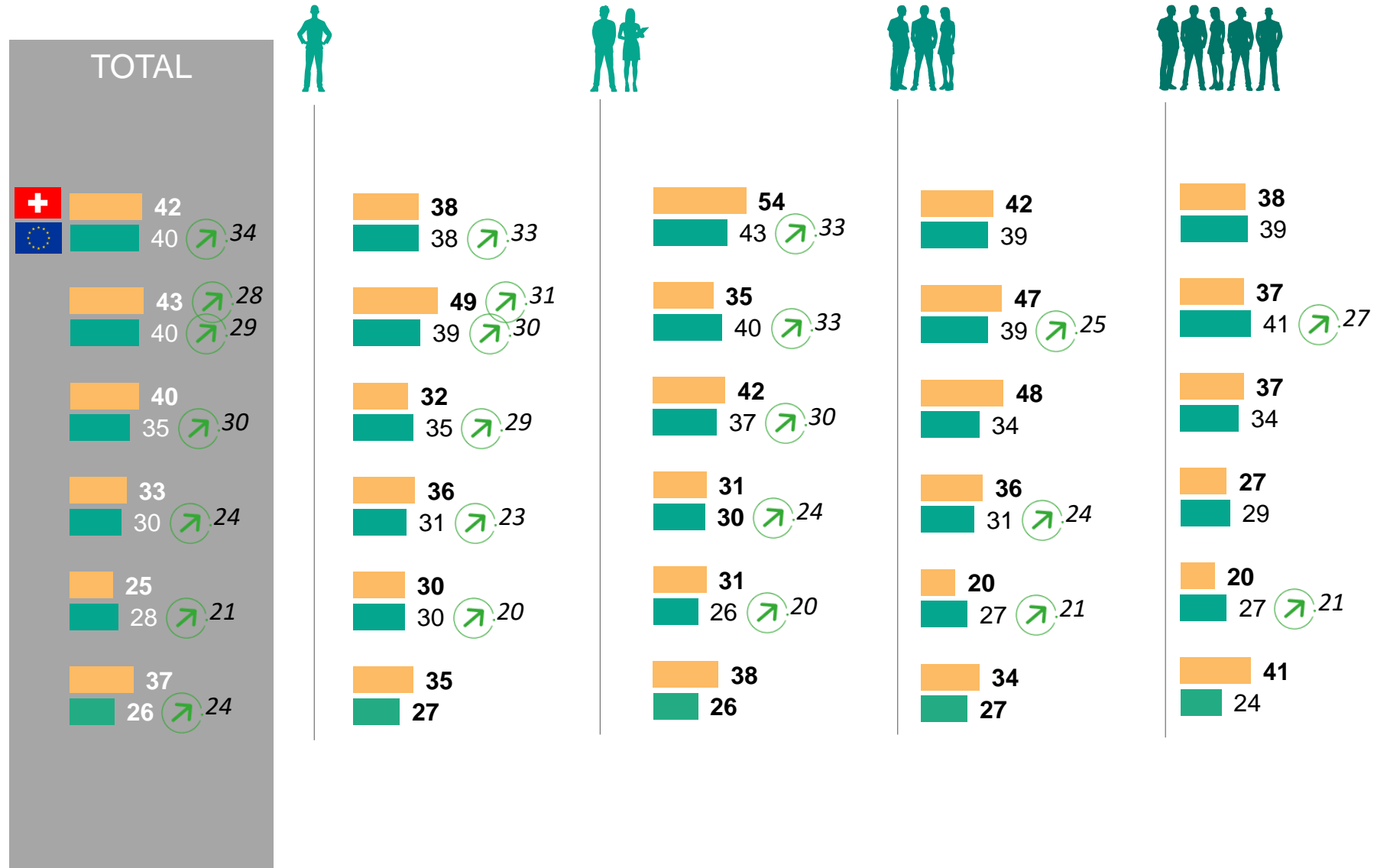
ALREADY
USING



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

REASONS FOR IMPLEMENTING OR CONSIDERING MOBILITY SOLUTIONS

In %



REASONS TO OFFER A MOBILITY BUDGET

In %



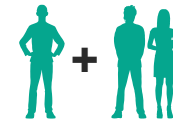
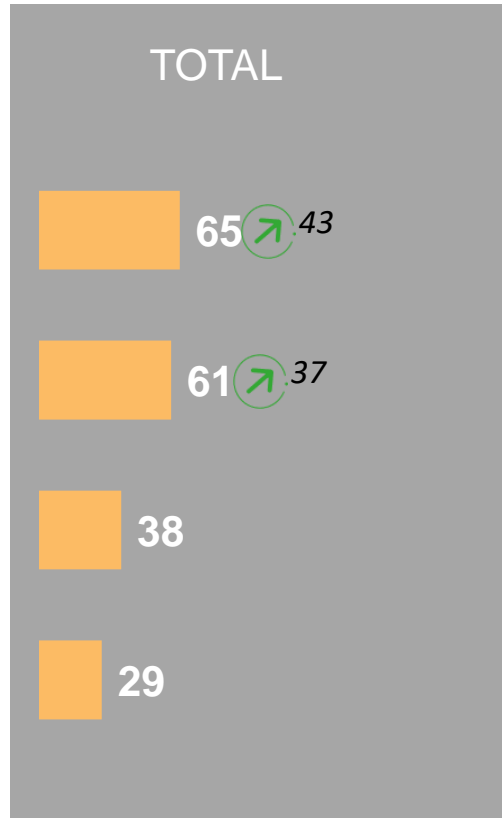
Passenger cars + LCVs

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

It brings lower cost of mobility

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

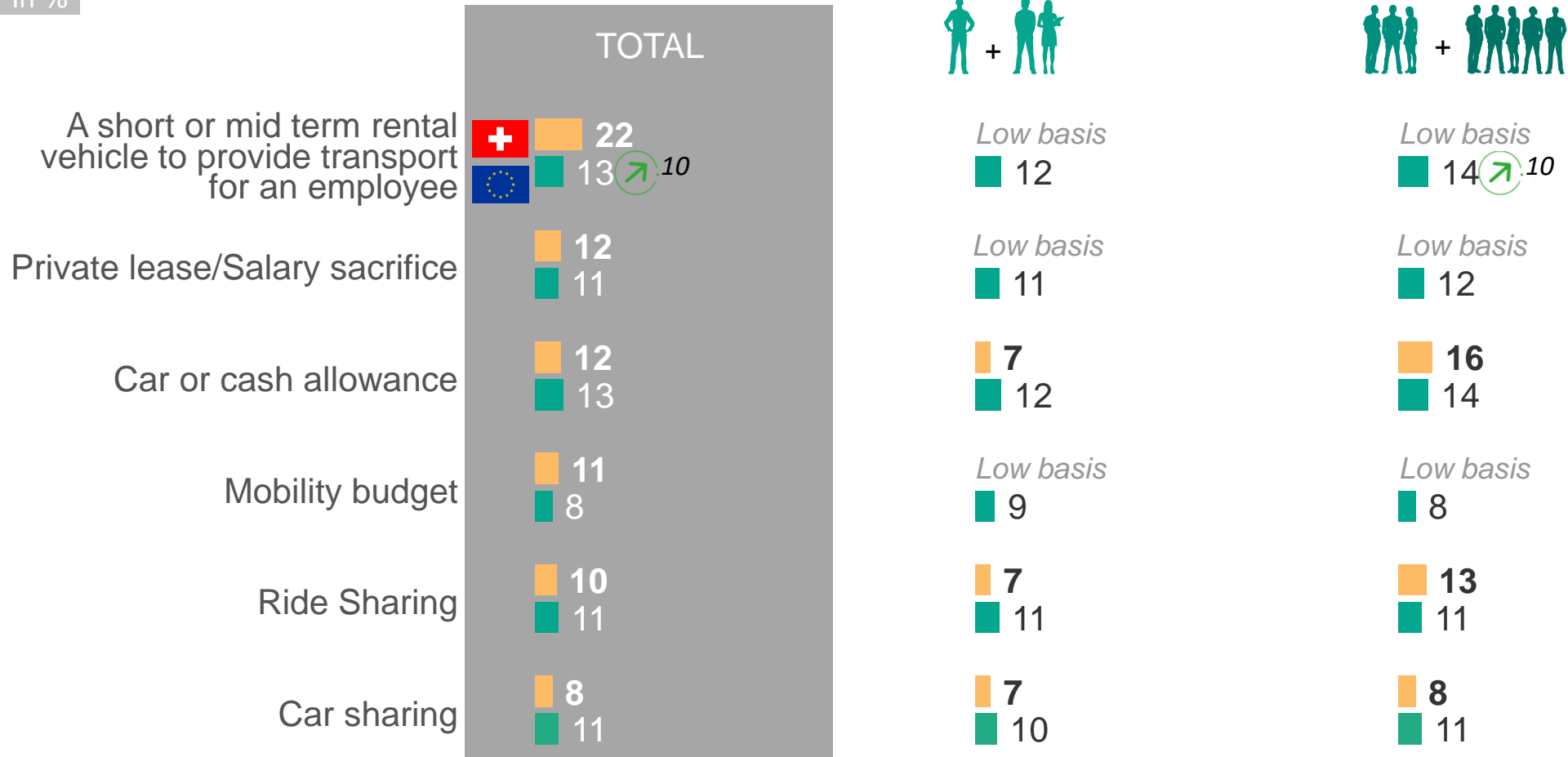
Higher productivity as a result of different use of time



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

Certainly

In %



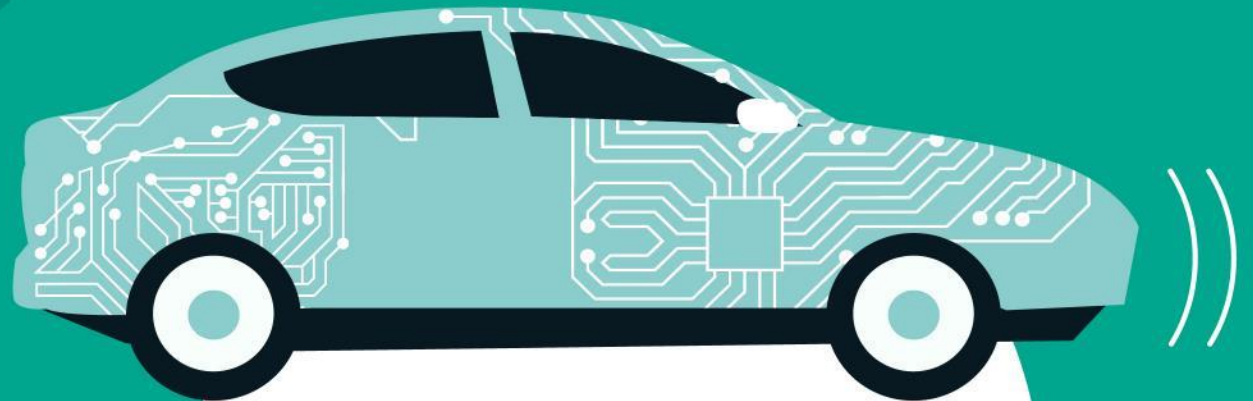
Would you anticipate that your company would give up all or part of the company car fleet for such alternatives?

Basis: companies using or considering at least one mobility solution

Question asked to respondents that are aware of mobility solutions

7

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



STABLE USE OF TELEMATICS OVERALL WITH A SLIGHT ADVANTAGE FOR PASSENGER CARS OVER LCVS REGARDING THE DATA USAGE

1

- The use of connected vehicles is stable in Switzerland and rather in line with the European picture, with 34% of Swiss companies using telematics tools for their fleet (vs 38% for the European average) and no major differences between passenger cars and LCVs.

2

- As for passenger cars, 16% use the data coming from the vehicle box thanks to a telematics platform – somehow above the 11% average usage rate among LCVs.

CONNECTED VEHICLES



USE OF CONNECTED VEHICLES



34%



38%



USE OF TELEMATICS DATA



15%

Already using



15%

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

All vehicles

In %



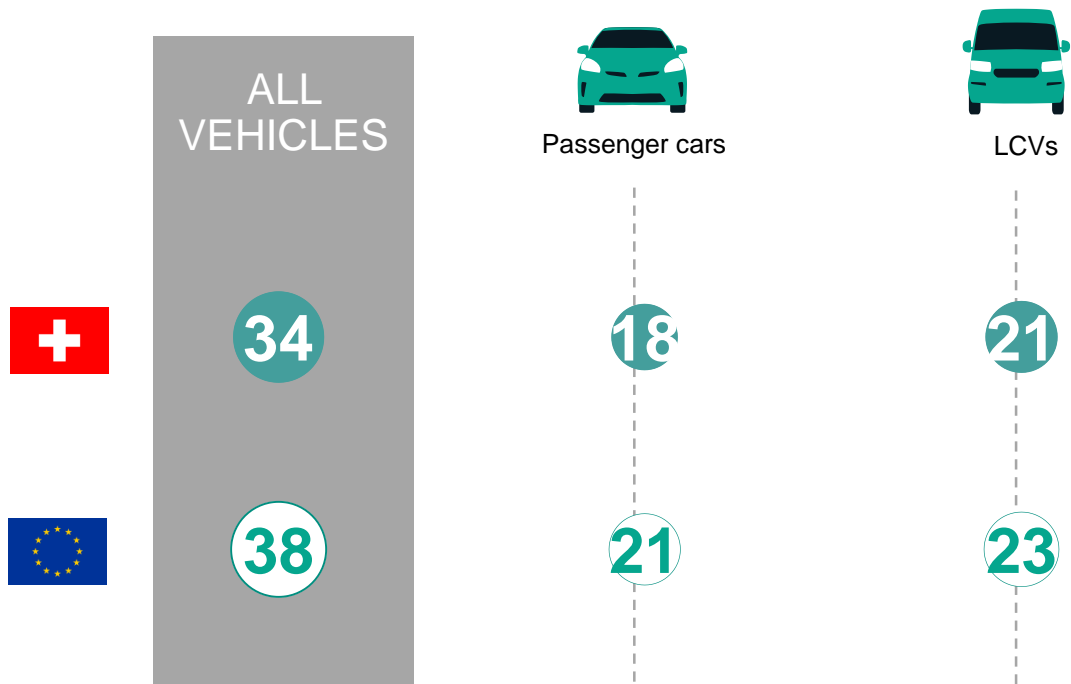
Passenger cars + LCVs

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

HOW TO READ THE RESULTS ?

34% of companies with fleet using connected vehicles for all or part of their fleet.

18% use connected vehicles for passenger cars, while 21% use connected vehicles for LCVs.



Change of definition in 2024. No comparison with 2023

Is your fleet connected thanks to a telematic tool?

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

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

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

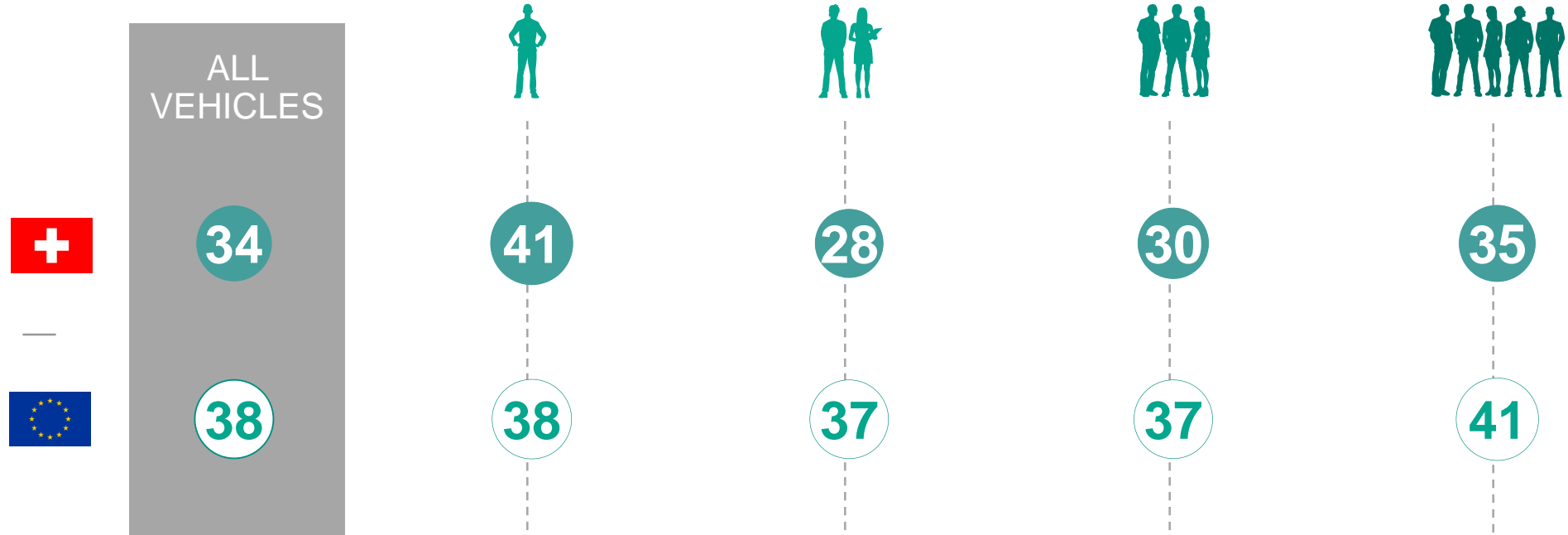
All vehicles

In %



Passenger cars + LCVs

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



Change of definition in 2024. No comparison with 2023

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

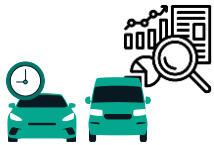
PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

All vehicles

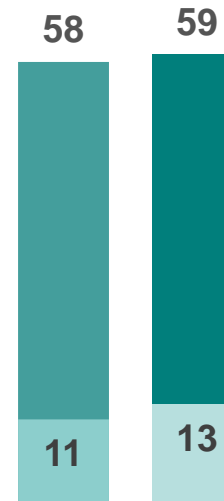
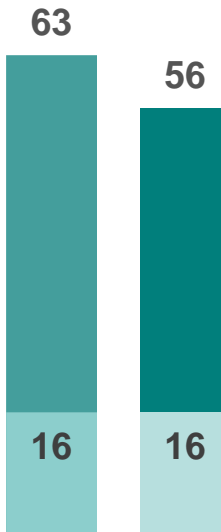
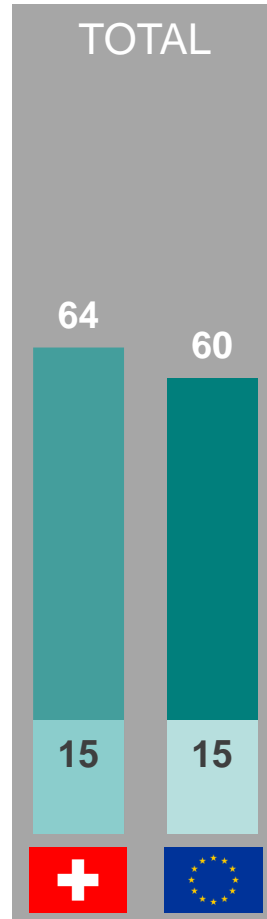
In %



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



HOW TO READ THE RESULTS ?

64% of the companies are already using or consider using the data coming from the vehicle box thanks to a telematics platform in the next 3 years.
15% of companies are currently using the data.

New question added in 2024

Do you use or consider using the data coming from the vehicle box thanks to a telematics platform ?
Basis: companies with a fleet using connected vehicles for all or part of their fleet.

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

All vehicles

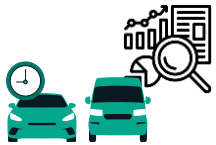
In %



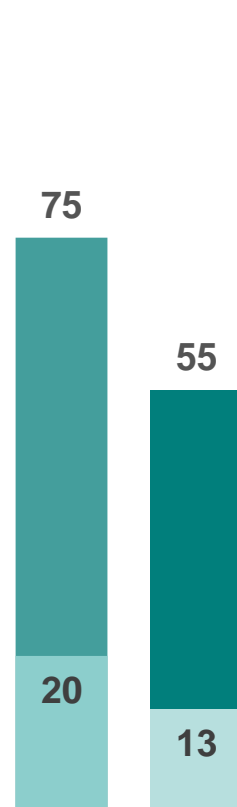
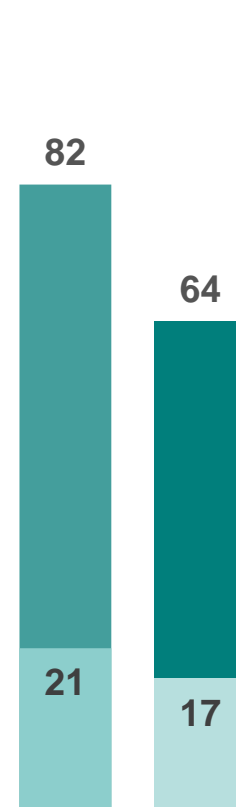
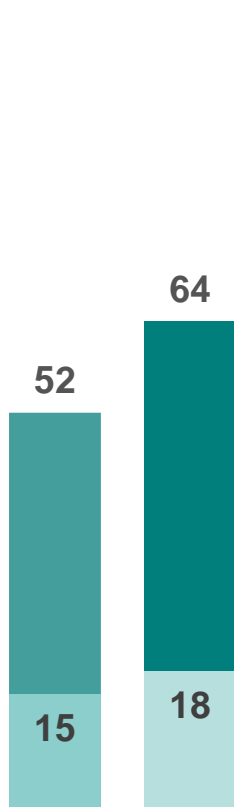
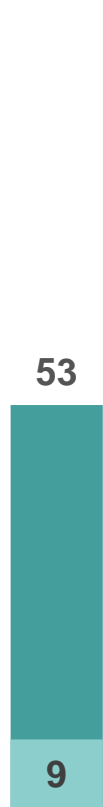
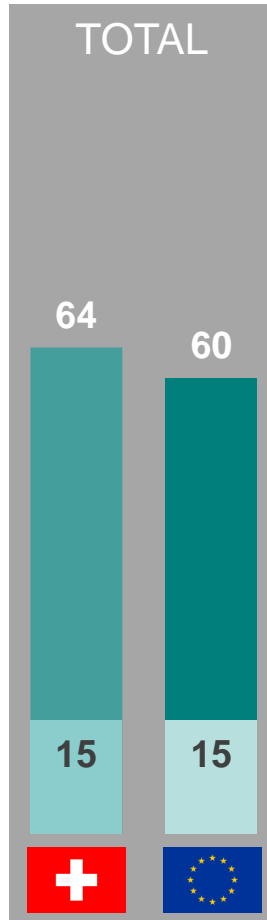
Passenger cars + LCVs



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



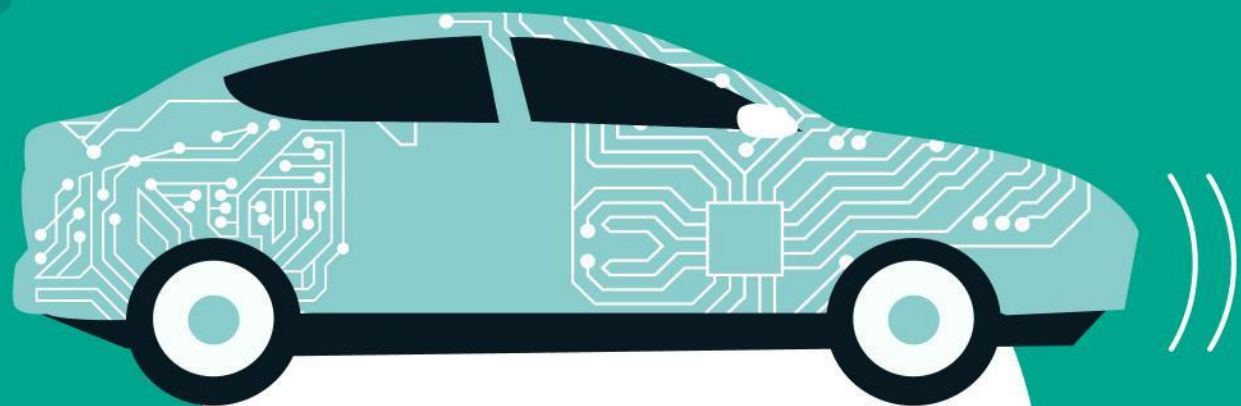
New question added in 2024

Do you use or consider using the data coming from the vehicle box thanks to a telematics platform?
Basis: companies with a fleet using connected vehicles for all or part of their fleet.

7

CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY

A. PASSENGER CARS



PROPORTION OF COMPANIES USING CONNECTED VEHICLES

Passenger cars

In %

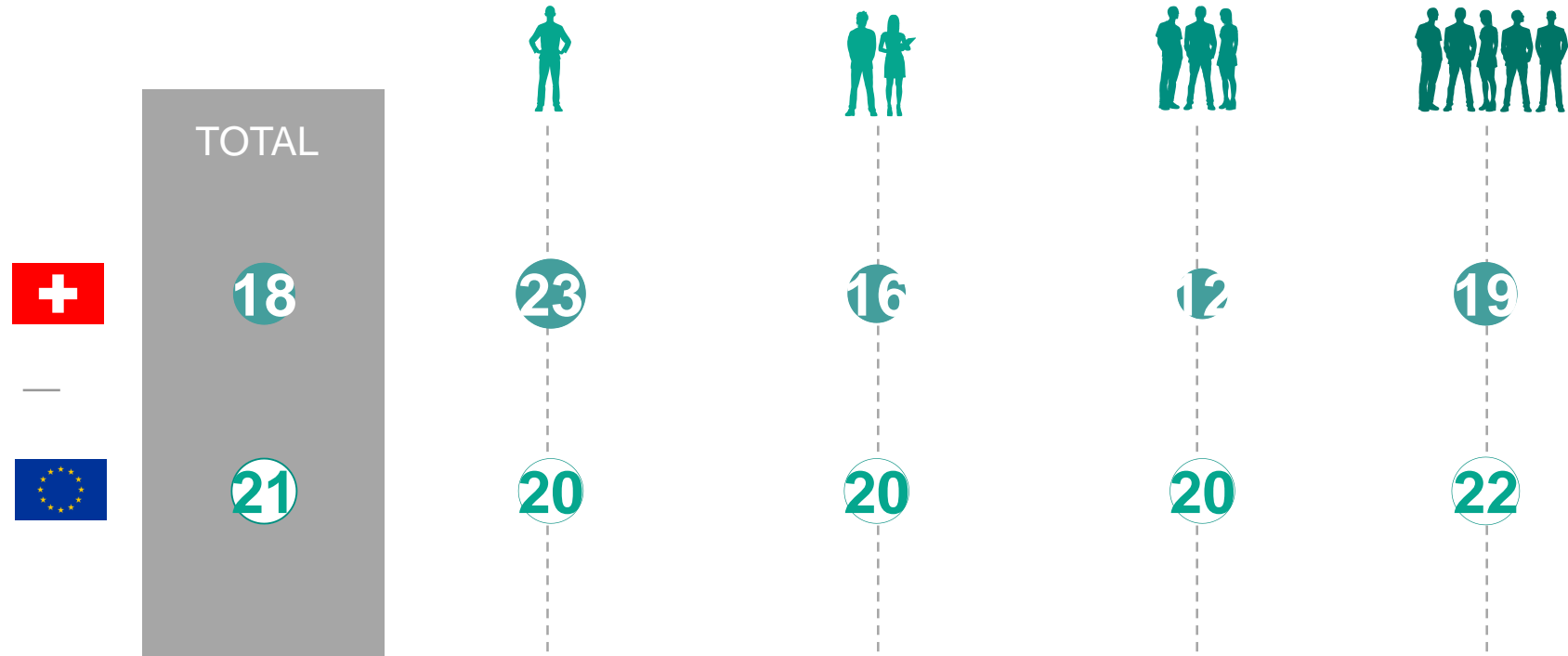


Passenger cars

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

HOW TO READ THE RESULTS ?

18% use connected vehicles for passenger cars.



Change of definition in 2024. No comparison with 2023

Is your fleet connected thanks to a telematic tool?
Basis: companies with at least one passenger car in fleet

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

Passenger cars

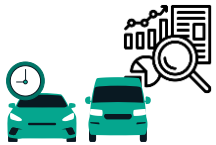
In %



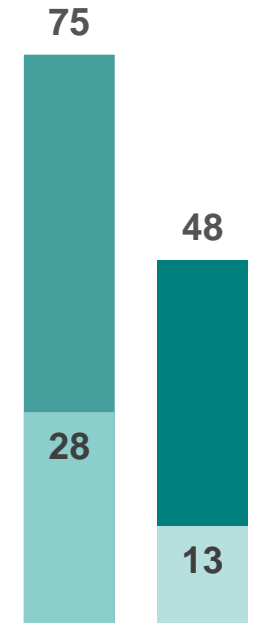
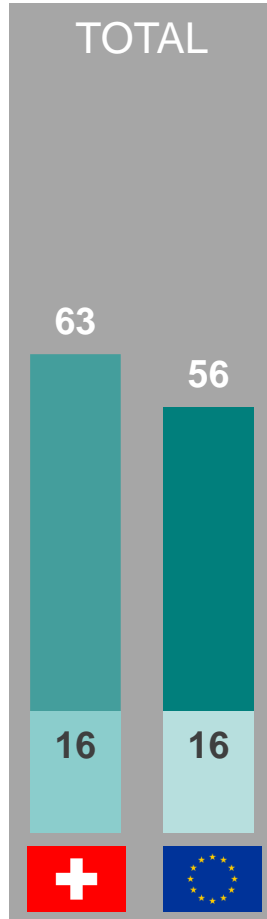
Passenger cars



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



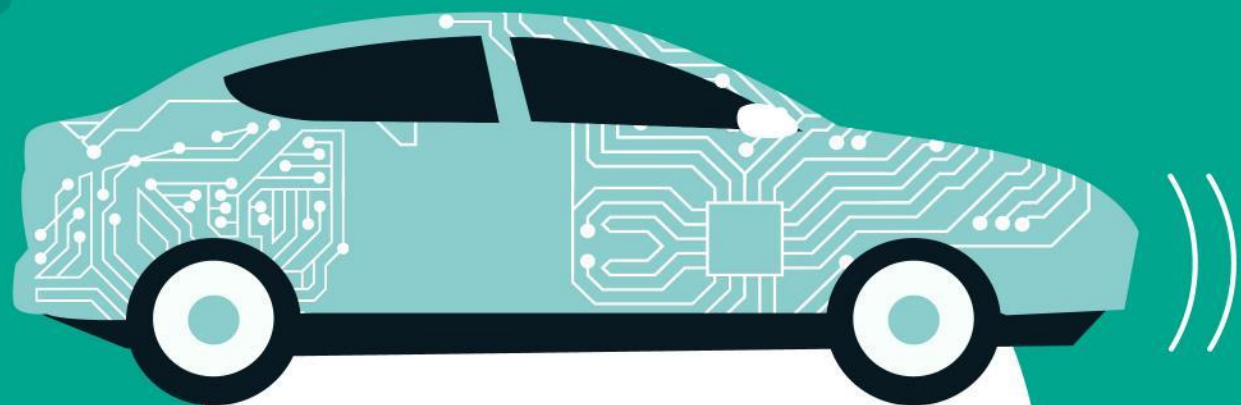
New question added in 2024

Do you use or consider using the data coming from the vehicle box thanks to a telematics platform?
Basis: companies with a fleet using connected vehicles for all or part of their passenger cars.

7

CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY

B. LCVs



PROPORTION OF COMPANIES USING CONNECTED VEHICLES

LCVs

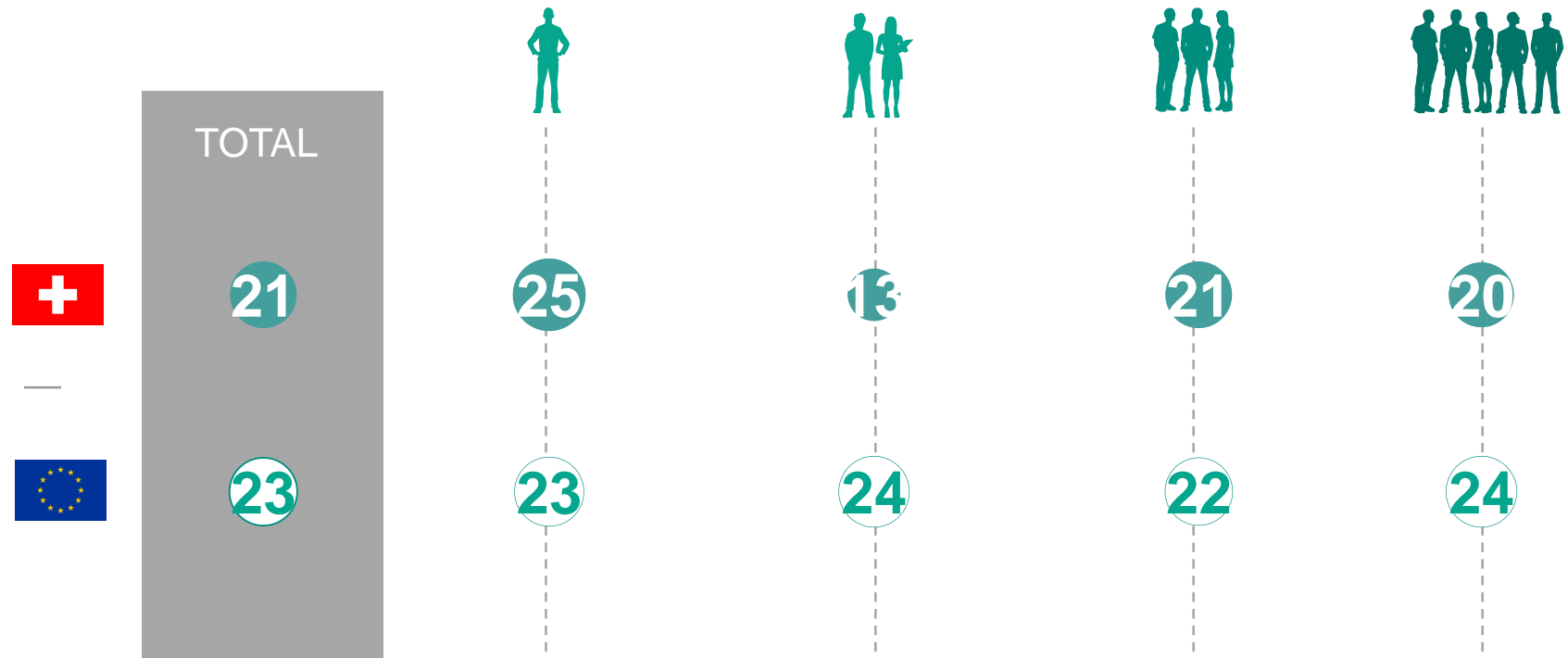
In %



LCVs

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

HOW TO READ THE RESULTS ?
21% use connected vehicles for LCVs.



Change of definition in 2024. No comparison with 2023

Is your fleet connected thanks to a telematic tool?

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

Basis: companies with at least one LCV car in fleet

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

LCVs

In %



LCVs



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



New question added in 2024

Do you use or consider using the data coming from the vehicle box thanks to a telematics platform?
Basis: companies with a LCVs fleet using connected vehicles for all or part of their LCV.

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

LCVs

In %



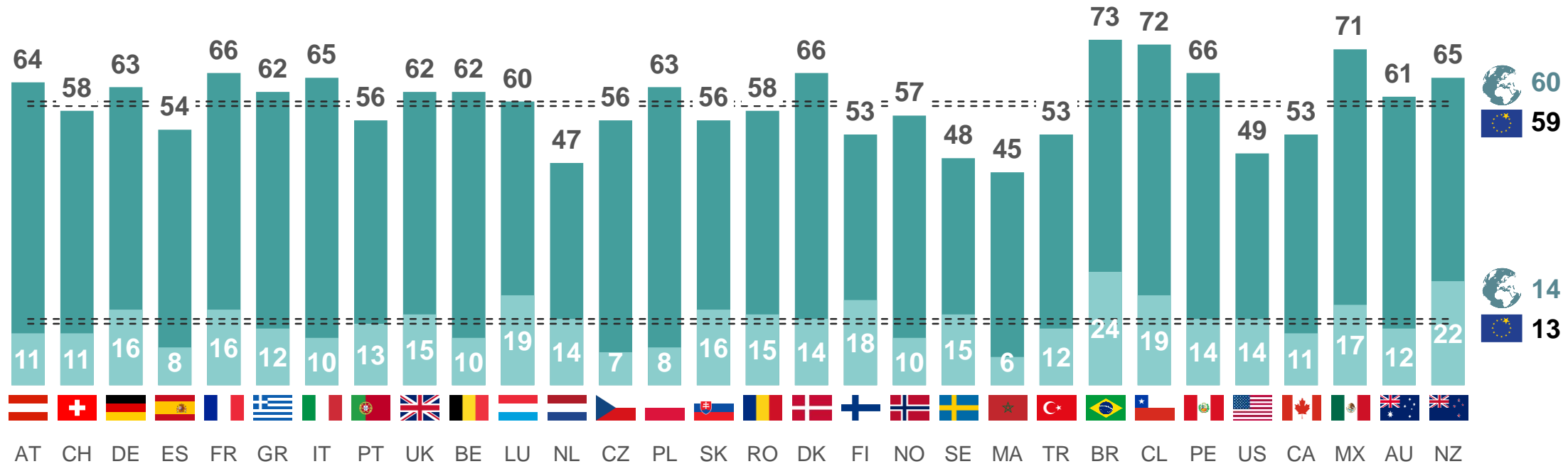
LCVs



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



60

59

14

13

New question added in 2024

Do you use or consider using the data coming from the vehicle box thanks to a telematics platform?
Basis: companies with a fleet using connected vehicles for all or part of their LCV.



Thank you

