



# MOBILITY AND FLEET BAROMETER 2022

## 01

Context and methodology

..... p3

## 02

Executive summary

..... p11

## 03

What are the main characteristics of the fleets?

..... p15

## 04

How are companies financing their fleet?

..... p26

## 05

What are the perspectives in terms of alternative mobility solutions ?

..... p29

## 06

What changes are to be expected in the near future regarding energy mix?

..... p52

## 07

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

..... p61

1

# CONTEXT AND METHODOLOGY



# KEY THEMES FOR ARVAL MOBILITY OBSERVATORY



— 1

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



— 2

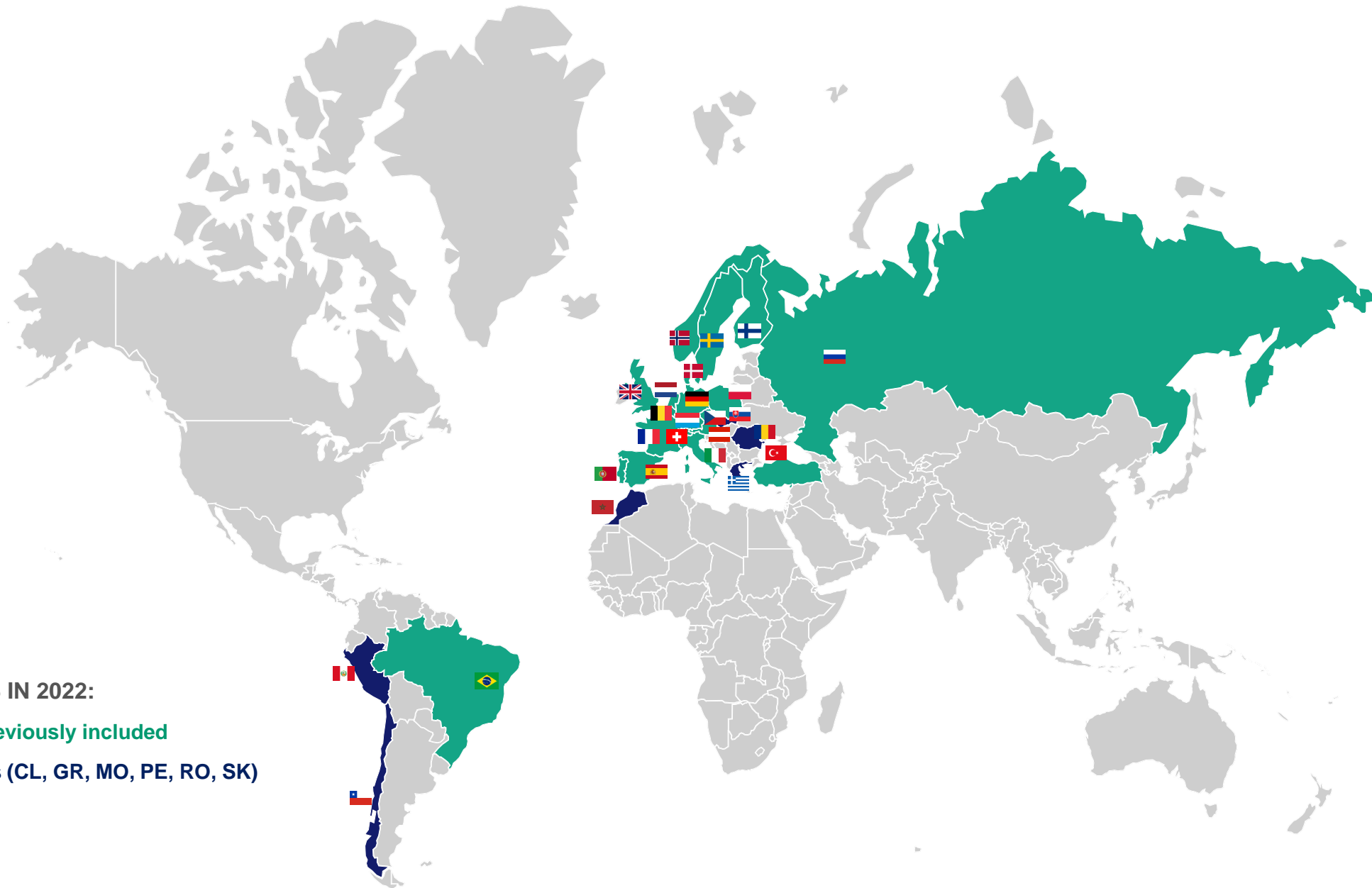
WHAT KIND OF VEHICLES  
WILL THE MARKET  
EXPECT IN 3 YEARS?



— 3

HOW WILL NEW MOBILITY  
SOLUTIONS AFFECT  
BUSINESS MODELS?

# SCOPE OF THE SURVEY



26 COUNTRIES IN 2022:

■ 20 countries previously included

■ 6 new countries (CL, GR, MO, PE, RO, SK)

# COMPANY SIZE SEGMENT DEFINITION

WORLD

EUROPE

OUTSIDE EUROPE




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



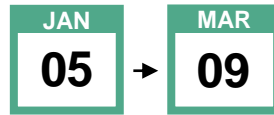
## DATA COLLECTION METHOD

**CATI CAWI SYSTEM**  
 Recruitment by telephone with a mixed data collection method, offering a possibility

- to answer to the rest of the Qnr by telephone,
- or to complete the survey online via the link sent by email



## FIELDWORK PERIOD



## TARGET

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



## QUOTAS

**COMPANY SIZE & SECTOR**



## SAMPLE

5 896 | through Europe  
 1 680 | out of Europe  
 -----  
**7 576** | Interviews in total



## DURATION OF INTERVIEW

**10**  
 minutes  
 on average

## READING NOTES ABOUT THE REPORT

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



X  
X

Significantly higher than 2021 year



X  
X

Significantly higher than 2020 year

XX = score 2021 or 2020



X  
X

Significantly lower than 2021 year



X  
X

Significantly lower than 2020 year

XX = score 2021 or 2020

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

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

# NUMBER OF INTERVIEWS CONDUCTED IN NETHERLANDS

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



Companies with less than 10 employees  
**111 INTERVIEWS**



Companies with 10 to 99 employees  
**62 INTERVIEWS**



Companies with 100 to 499 employees  
**80 INTERVIEWS**



Companies with 500 employees and more  
**47 INTERVIEWS**



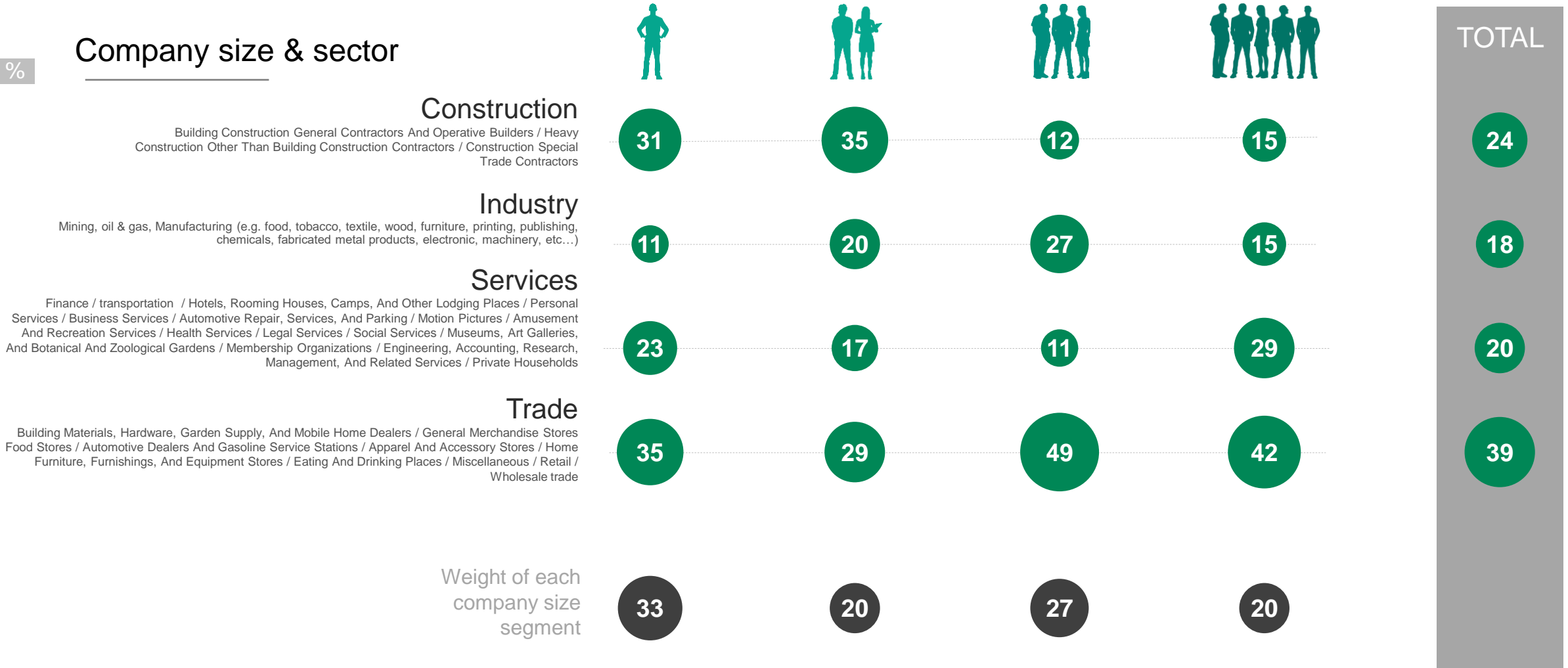


# SAMPLE STRUCTURE IN NETHERLANDS



In %

## Company size & sector



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

# MOBILITY ALTERNATIVES LIST AND DEFINITIONS



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



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



**RIDE SHARING** where several employees travel in the same car to the same destination (Bolt, Faxe)



**AN APP TO BOOK MOBILITY SOLUTIONS PROVIDED BY THE COMPANY**



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



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



**PUBLIC TRANSPORT**



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

2

# EXECUTIVE SUMMARY



# INSIGHT 1: THE DUTCH COMPANIES ARE CONFIDENT ABOUT THE FUTURE OF THEIR FLEETS IN THE CONTEXT WHERE COVID CRISIS GOES DOWN

#1

## THE DUTCH FLEET MARKET IS LESS IMPACTED BY COVID SITUATION THIS YEAR

- This year, a **large majority of Dutch companies expect that their fleet will remain stable or even increase**, in line with the European trend.
  - Only 5% of companies anticipate the decrease of their fleet.
- While the context starts getting back to normal with regards to the Covid, **the anticipated fleet growth is mainly driven by economical reasons**, followed by **HR needs**. In contrast, it **is much less related to Covid situation**: less emergency to provide a safe commute to the employees this year.
- Despite the development of homeworking, this new mode of working **doesn't seem to have a major impact on mobility policies**.

## INSIGHT 2: ADOPTION OF ALTERNATIVE FUEL TECHNOLOGIES IS WIDESPREAD FOR PASSENGER CARS

#2

### MOST COMPANIES HAVE ALREADY ADOPTED THE ALTERNATIVE FUELS FOR PASSENGER CARS

- This year, **6 companies out of 10** have adopted at least one **alternative fuel technology** for their passenger cars.
  - Overall, the Netherlands position **ahead of the European average**.
  - The **adoption of Hybrid (38%), Plug-in Hybrids (37%) and 100% BEV (34%) is similar**.
  - The main motivation to turn towards alternative fuels consists in **lower environmental impact** of these cars, in line with the **CSR policies** and the desired **company image**. But **economical considerations**, such as lower fuel expenses, also count.
- The constraints for 100% BEV adoption are mainly linked to the **high purchase price and lack of charging infrastructure**.

## INSIGHT 3 : THE MOBILITY POLICY TRANSFORMATION ALSO RELIES ON THE ADOPTION OF THE ALTERNATIVE MOBILITY SOLUTIONS

#3

### THE ADOPTION OF THE ALTERNATIVE MOBILITY SOLUTIONS REMAINS HIGH

- With more than 8 companies out of 10 having adopted at least one mobility solution, **the Netherlands position ahead of the European average**. In addition, **29% plan to use tools** (dedicated platform or dedicated apps) to facilitate the use of these modes of transportation.
- The alternative mobility solutions are even **more common in large companies** than in small ones.
- To be noted, **these alternative solutions are considered as add-ons to the current fleet** and are not dedicated to replace company vehicles.
- **4 companies out of 10 are interested in offering their employees a mobility budget**, especially large companies. The same proportion of companies have a specific strategy on mobility CO2 footprint.

3

# WHAT ARE THE MAIN CHARACTERISTICS OF THE FLEETS?



# FLEET PROFILE



## MOBILITY POLICY CHANGE DUE TO HOMEWORKING



9%

changed the policy or  
consider changing



13%



## FLEET POSSESSION LENGTH

5.0

years



5.6

years



↑ 4.9



## ANTICIPATED GROWTH OF FLEET

(% increase or stable)

93%



93%





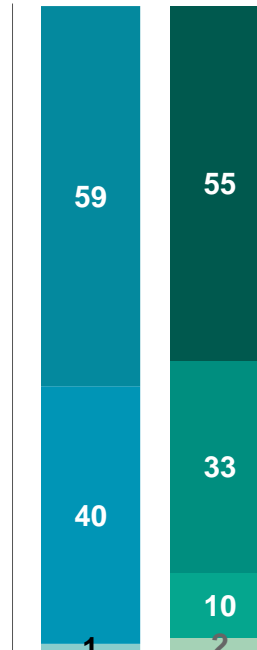
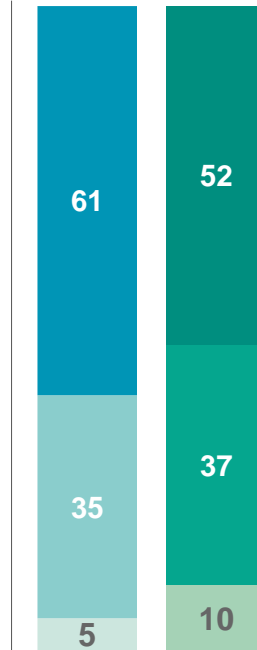
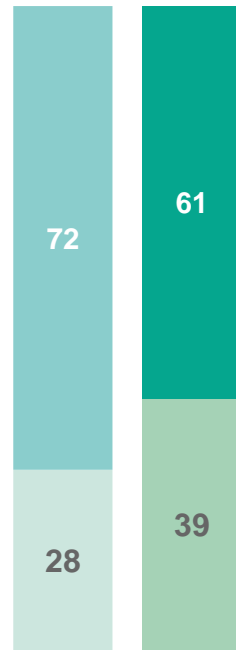
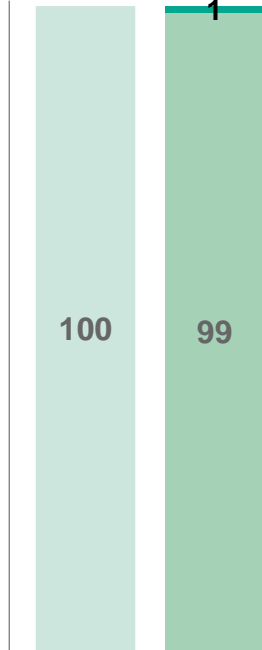
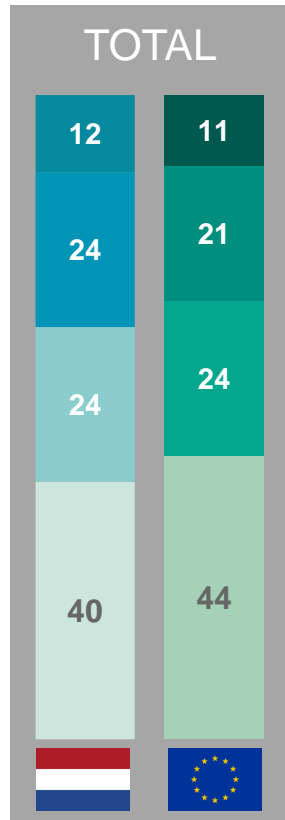
# NUMBER OF VEHICLES IN FLEET

In %



Passenger cars + LCVs

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

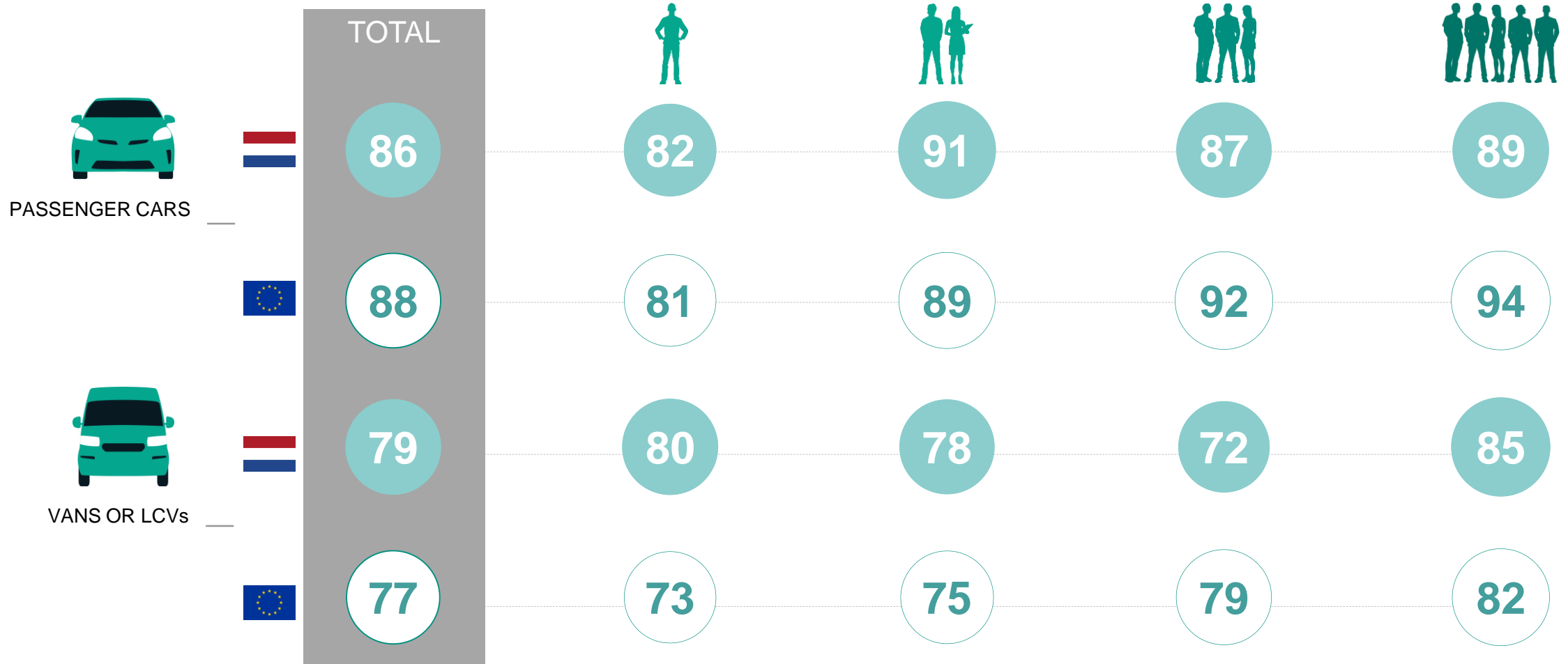


Can you please tell us the total number of vehicles of less than 3.5 tons in your fleet?  
Basis: companies with corporate vehicles = 100%

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

(among companies with at least one vehicle in fleet)

In %



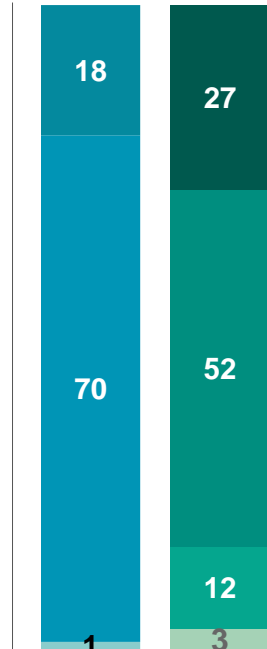
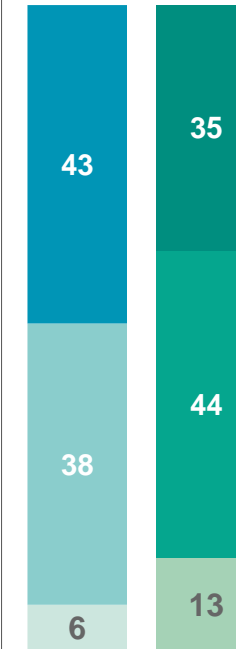
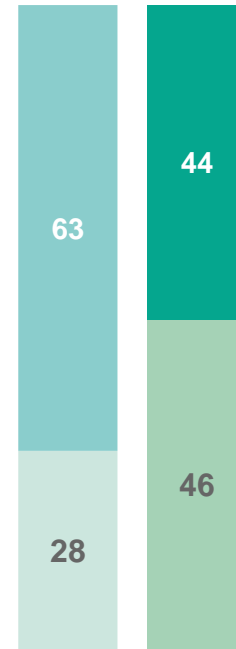
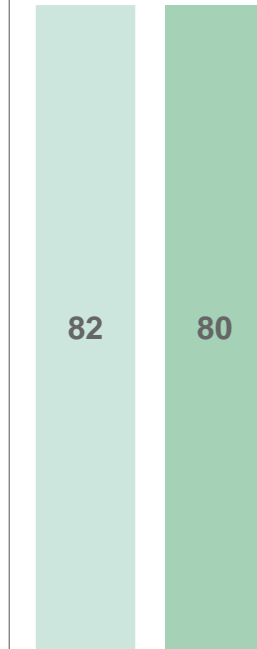
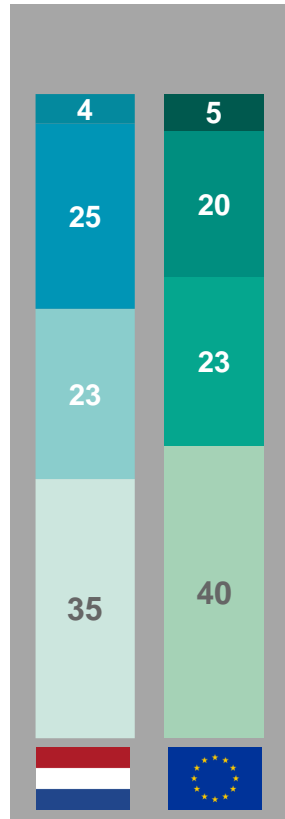
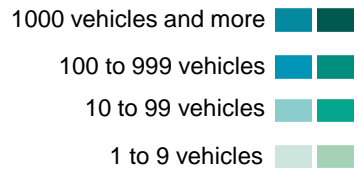
And can you please tell us the total number of cars in your fleet? / And can you please tell us the total number of LCVs or vans in your fleet?  
Basis: companies with corporate vehicles = 100%

# NUMBER OF PASSENGER CARS IN FLEET

In %



Passenger cars



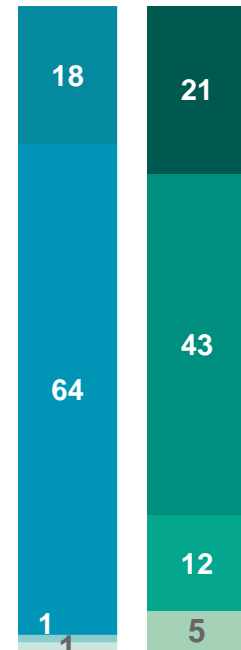
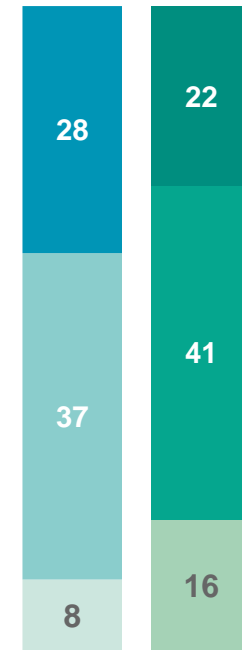
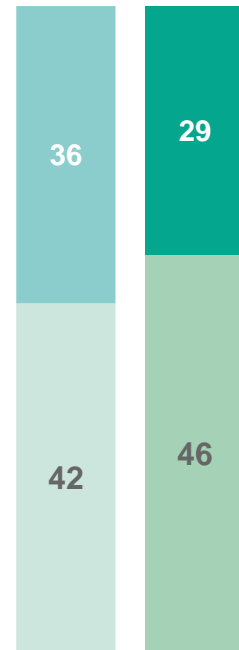
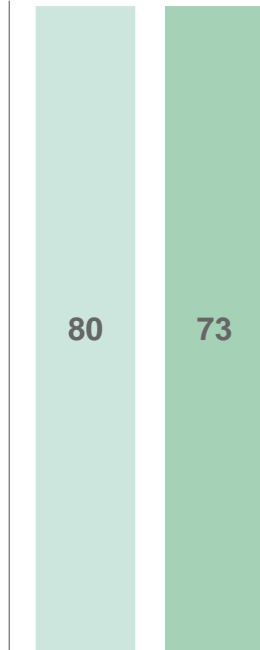
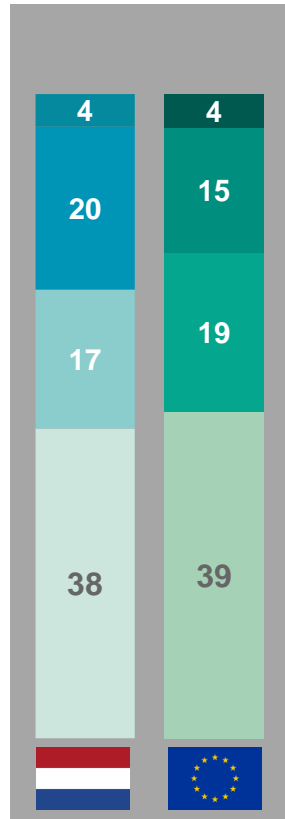
# NUMBER OF LCVS IN FLEET

In %



LCVs

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



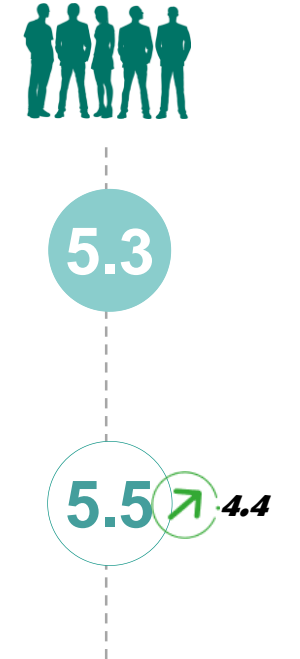
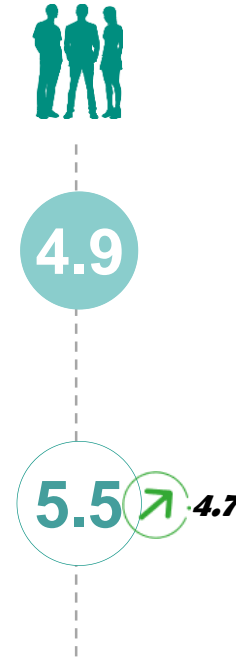
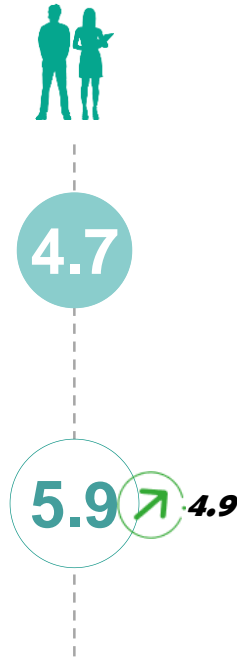
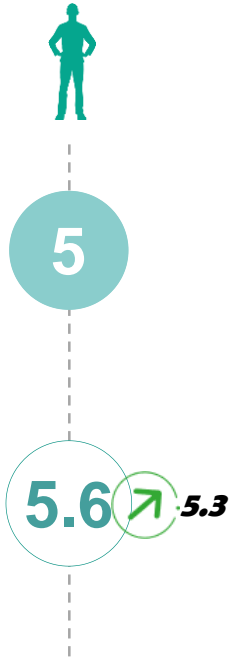
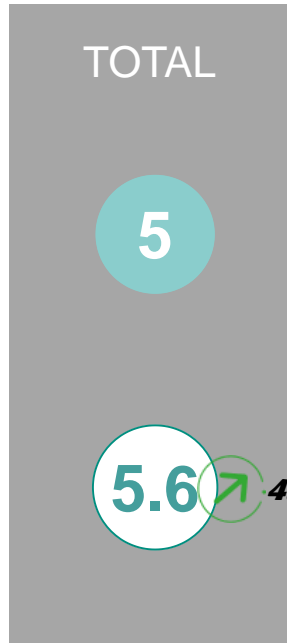
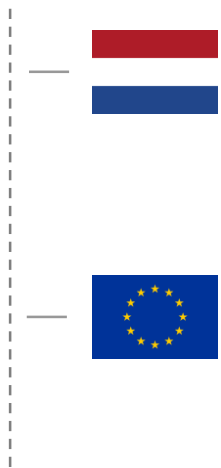
And can you please tell us the total number of LCVs or vans in your fleet?  
Basis: companies with corporate vehicles = 100%

# VEHICLES POSSESSION LENGTH



Passenger cars + LCVs

AVERAGE IN YEARS

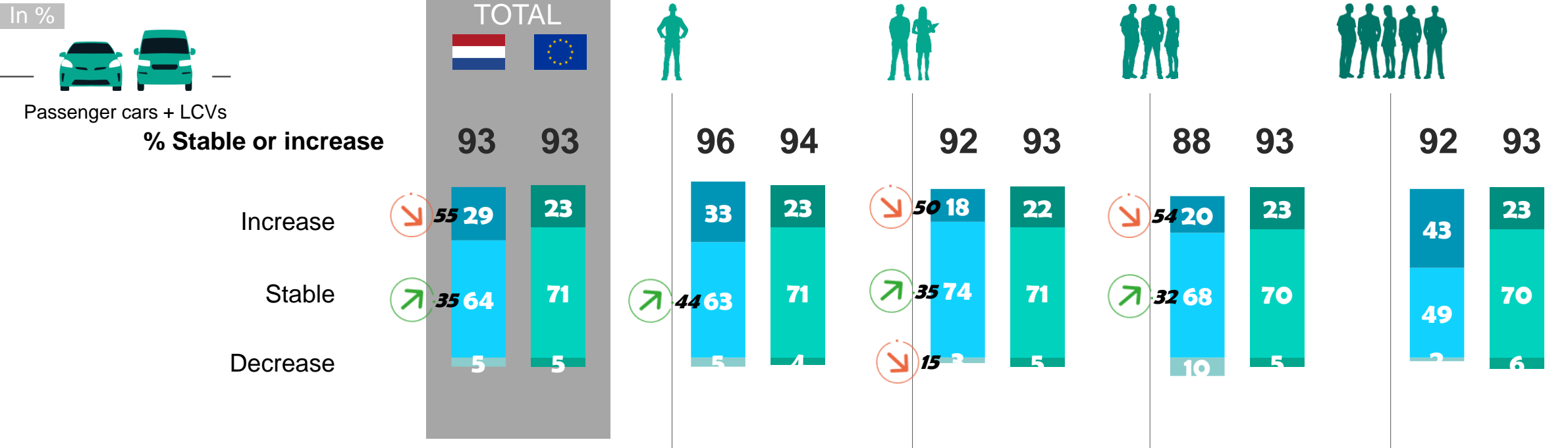


*On average, how long do you keep your vehicles (before being sold or giving back to the leasing company)?*  
*Basis: companies with corporate vehicles = 100%*

# FLEET GROWTH POTENTIAL

## HOW TO READ THE RESULTS ?

In Netherlands, 93% of the companies declare that in the next 3 years their company fleet will remain stable or increase.



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



2022	+23	+18	+28	+19	+16	+17	+10	+17	+41	+17
2021	+46	+35	+41	+22	+35	+31	+45	+43	+67	+50
2020	+24	+20	+9	+12	+36	+23	+23	+24	+38	+25

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

# REASONS FOR FUTURE FLEET INCREASE

In %

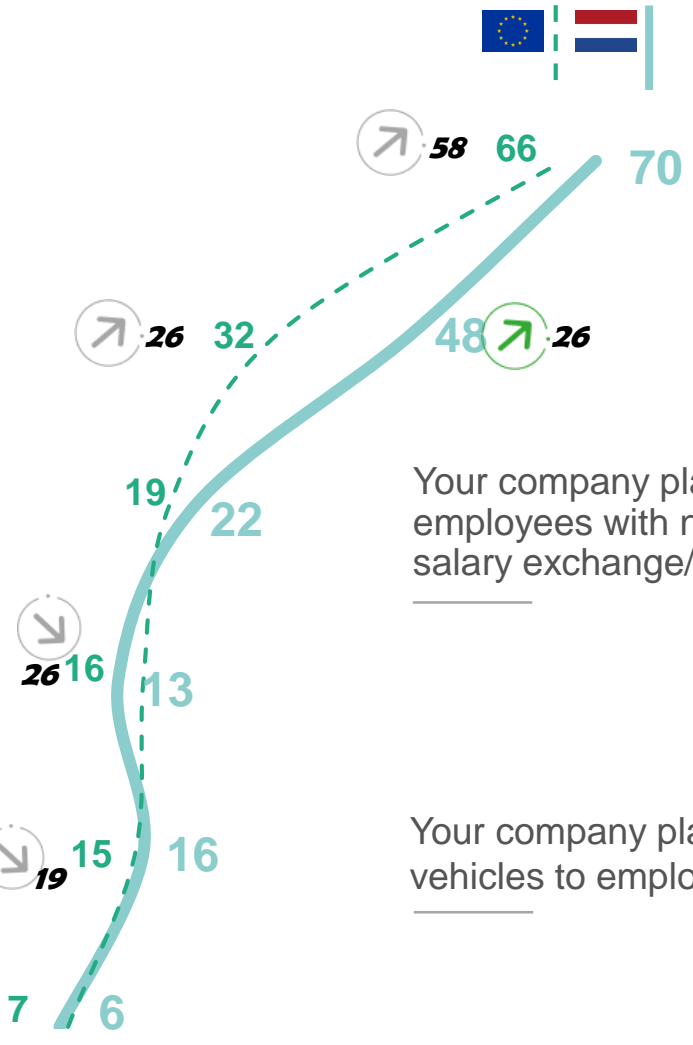


Passenger cars + LCVs

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

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

Because of tax decreases



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

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

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

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

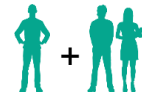
# IMPACT OF THE COVID-19 CRISIS ON THE FLEET SIZE EVOLUTION

In %

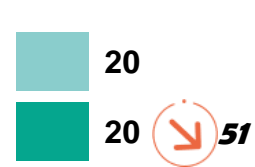


Passenger cars + LCVs

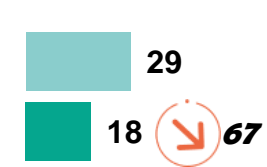
**NET YES**  
(totally + partially)



+



+



No, it is more a general tendency in our company

Is the evolution of the total number of vehicles in your company directly linked to the COVID-19 crisis?  
Basis: companies expecting an increase or a decrease of the fleet



# MOBILITY POLICY ADAPTION COINCIDING WITH HOMEWORKING

## HOW TO READ THE RESULTS ?

In the Netherlands, among the companies that changed or consider changing their mobility policy with regards to homeworking, 34% have already changed the company car policy in terms of mileage or models.

In %



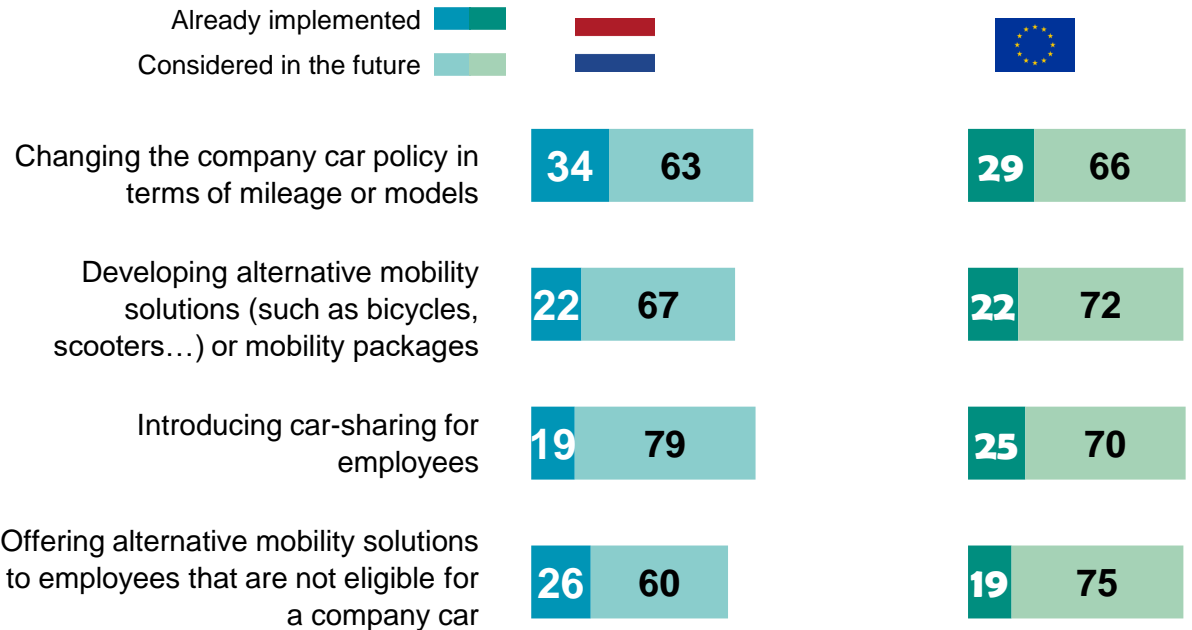
Passenger cars + LCVs

### NET CHANGED THE POLICY OR CONSIDER CHANGING

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



Basis: companies with corporate vehicles = 100%



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

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?

4

# HOW ARE COMPANIES FINANCING THEIR FLEET?



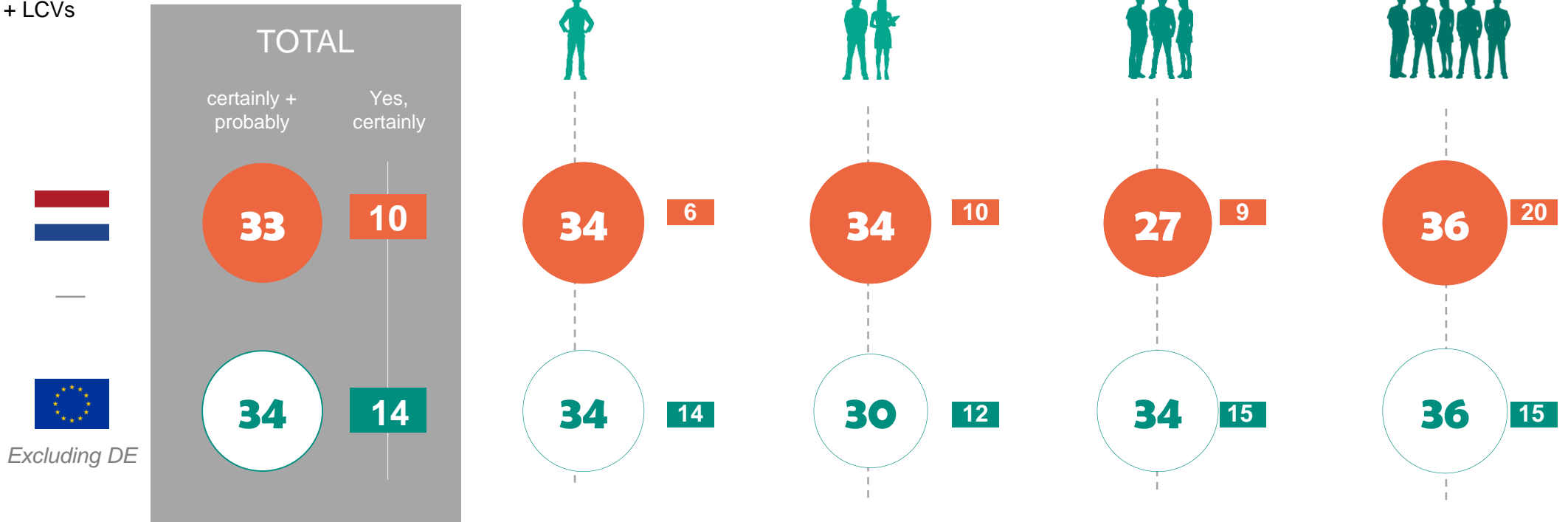
# INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATING LEASING

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

In %



Passenger cars + LCVs



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

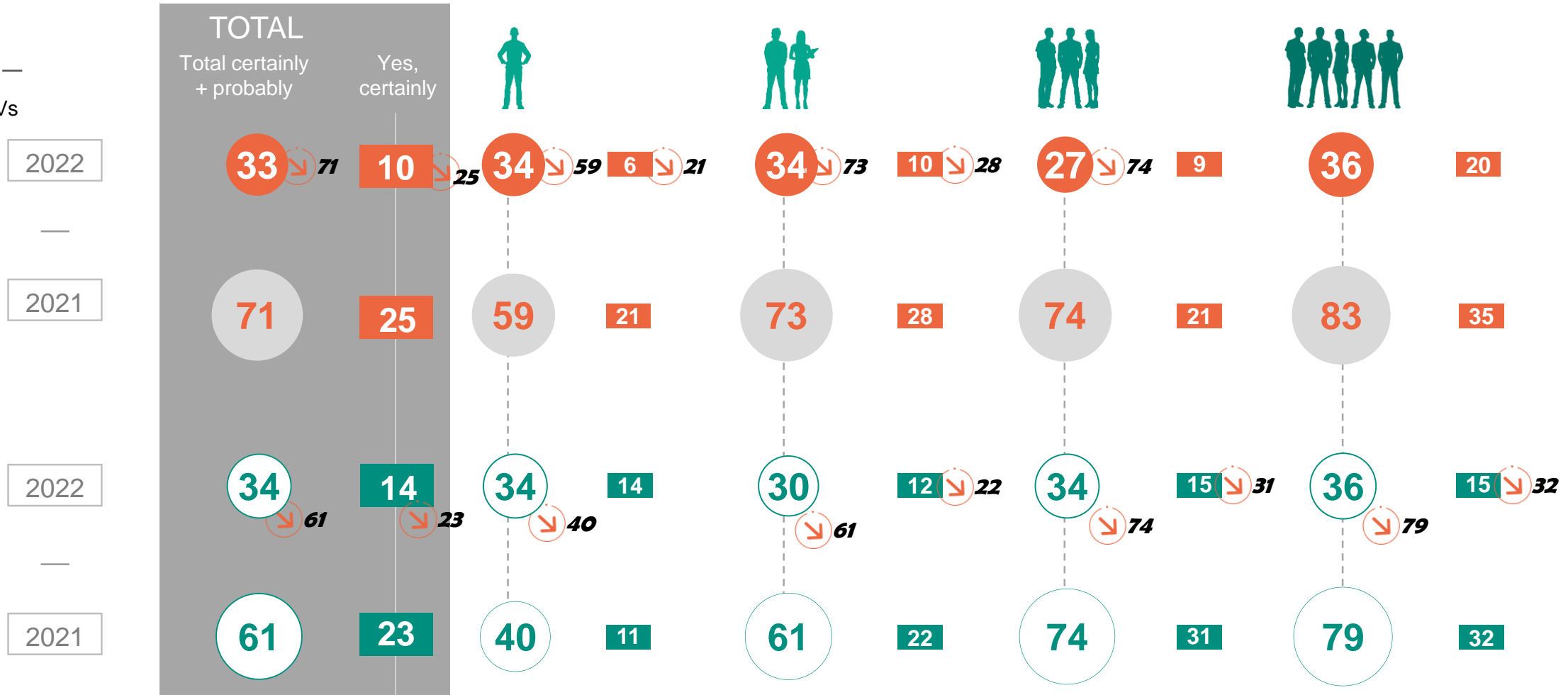
# EVOLUTION OF THE INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATING LEASING

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

In %



Passenger cars + LCVs



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

5

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



# ENERGY MIX



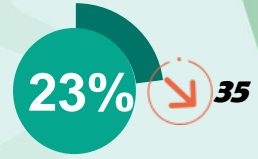
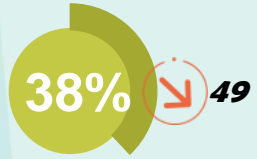
**AT LEAST ONE ALTERNATIVE  
IMPLEMENTED OR CONSIDERED\***

for Passenger cars

ALREADY  
USING OR  
CONSIDER  
USING IN THE  
NEXT 3 YEARS



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

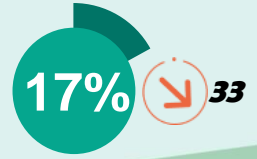


**AT LEAST ONE ALTERNATIVE  
IMPLEMENTED**

for Passenger cars



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



This question has been asked differently in 2021.

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

# EXPECTED SHARE OF PETROL OR DIESEL VEHICLES (IN 3 YEARS)

(Without Hybrid vehicles)

## HOW TO READ THE RESULTS ?

In the Netherlands in the next 3 years, 38% of the companies passenger car fleet and 48% of the light commercial vehicle fleet will be petrol or diesel vehicles.

In %



New question added in 2022

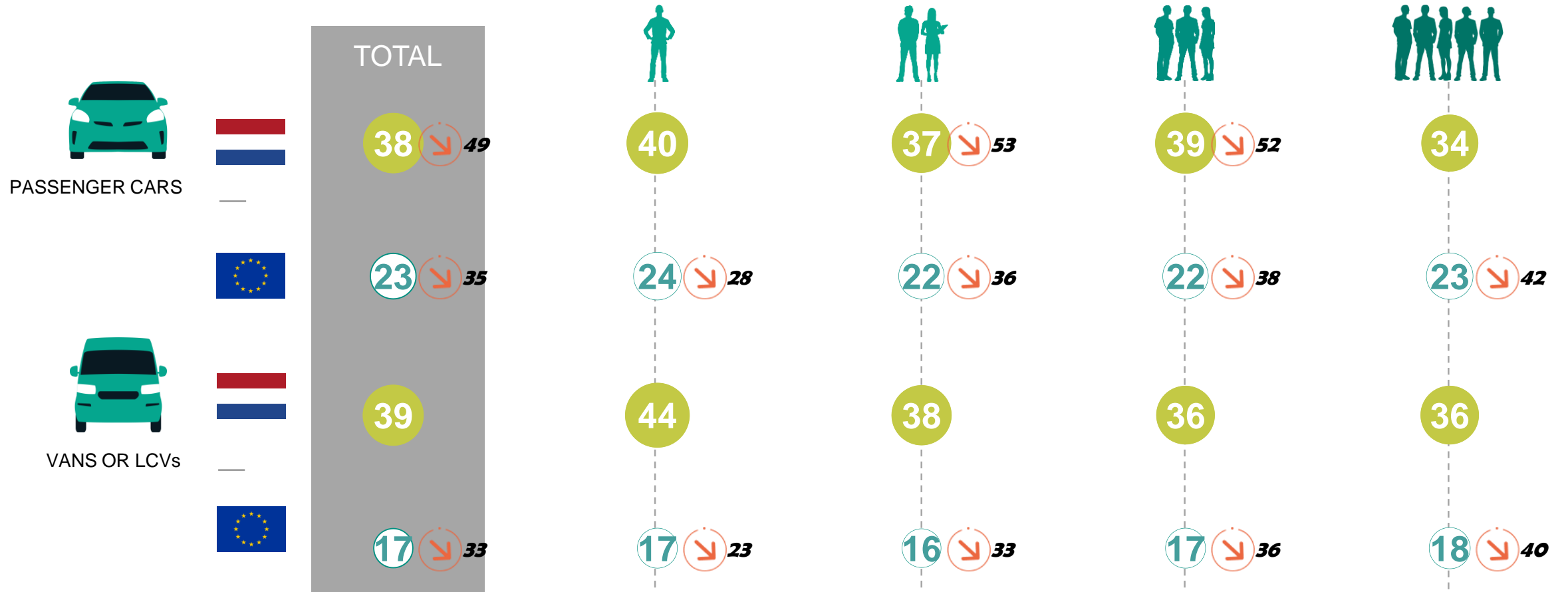
In your opinion, what percentage of your passenger car fleet will be either petrol or diesel vehicles in 3 years (please don't consider hybrid vehicles)?  
 In your opinion, what percentage of your light commercial vehicle fleet will be either petrol or diesel vehicles in 3 years (please don't consider hybrid vehicles)?  
 Basis: companies with passenger cars / companies with LCVs

# EXPECTED SHARE OF 100% BATTERY ELECTRIC VEHICLES (IN 3 YEARS)

In %

## HOW TO READ THE RESULTS ?

In the Netherlands in the next 3 years, 38% of the companies passenger car fleet and 39% of the light commercial vehicle fleet will be 100% Battery Electric Vehicle.



In your opinion, what percentage of your passenger car fleet will be 100% battery electric vehicles in 3 years (100% Battery Electric Vehicle)?  
 In your opinion, what percentage of your light commercial vehicle fleet will be 100% battery electric vehicles in 3 years (100 % Battery Electric Vehicle)?  
 Basis: companies with passenger cars / companies with LCVs



# CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES\*

(At least one technology among all types)

In %



Passenger cars

## HOW TO READ THE RESULTS ?

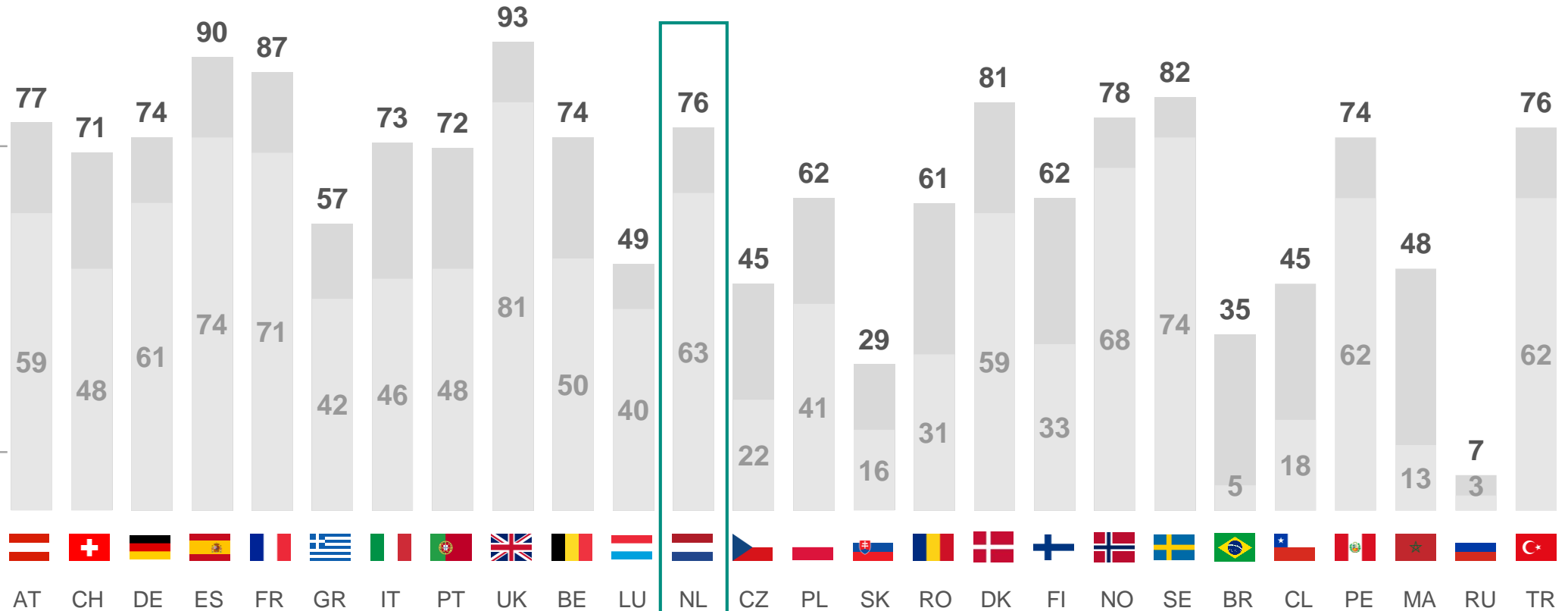
In the Netherlands, 76% of the companies are already using or consider to implement at least one alternative technology in the next 3 years. 63% of the companies are currently using at least one.



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING



\*This question has been asked differently in 2021.

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  
33

# CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES\*

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

In %



Passenger cars

## HOW TO READ THE RESULTS ?

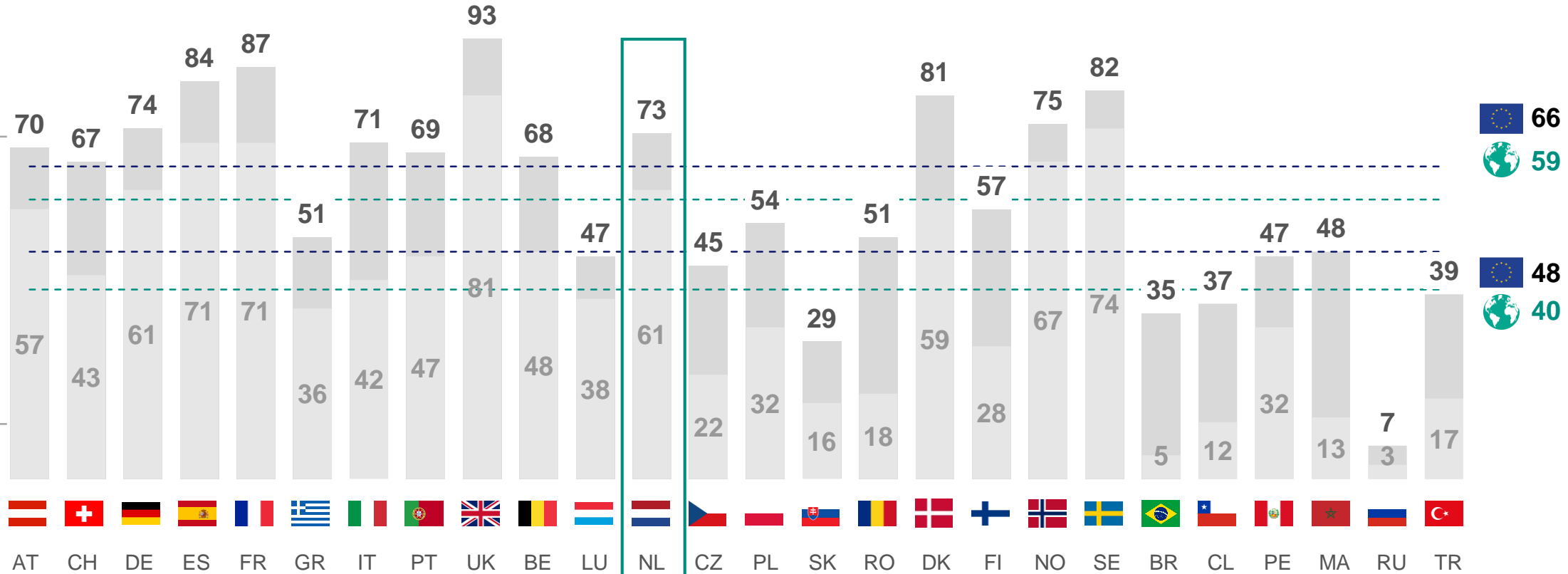
In Netherlands, 73% of the companies are already using or consider to implement at least one alternative technology in the next 3 years. 61% of the companies are currently using at least one.



ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS



ALREADY USING



EU 66  
Globe 59

EU 48  
Globe 40

\*This question has been asked differently in 2021.

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 all types)

In %

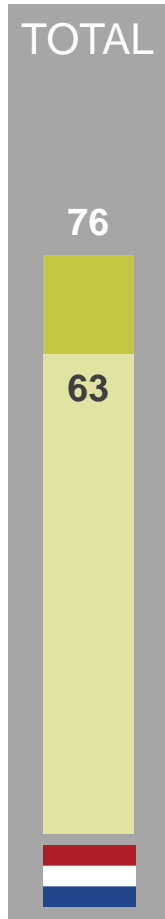
Passenger cars



ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS



ALREADY USING



81

58



75

70



69

56



78

71

\*This question has been asked differently in 2021.  
 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 %

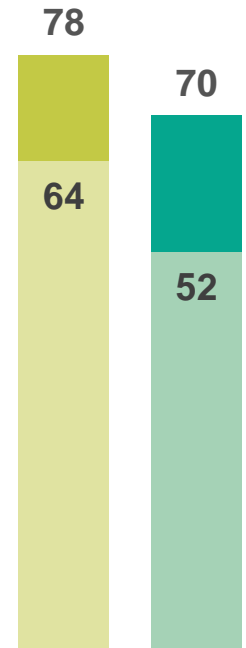
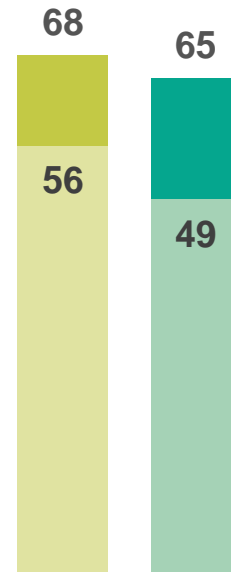
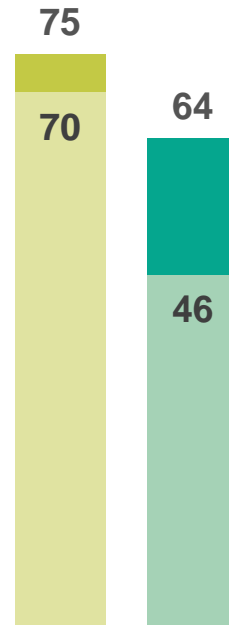
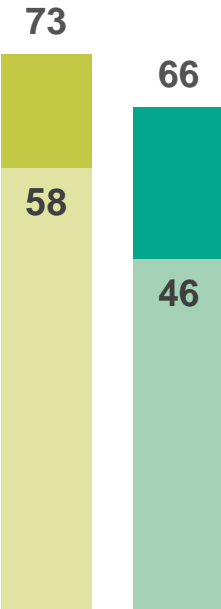
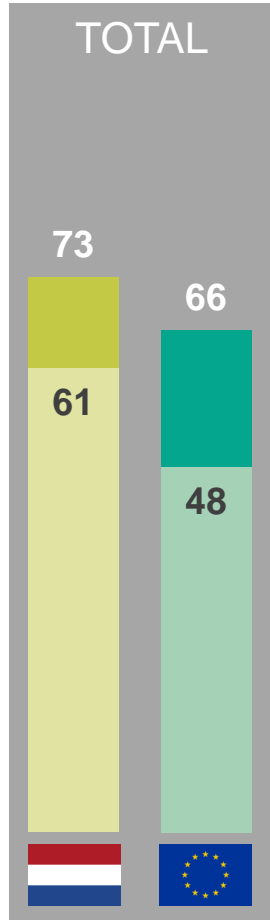
Passenger cars



ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS



ALREADY USING



\*This question has been asked differently in 2021.  
 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 %



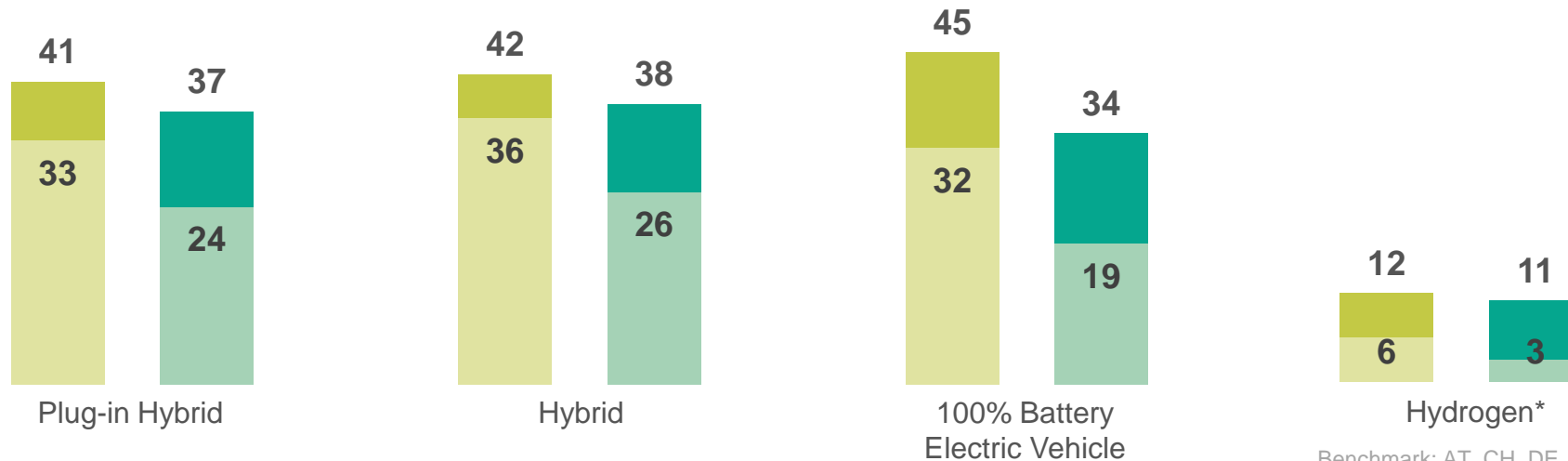
Passenger cars



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING



Benchmark: AT, CH, DE, ES, BE,  
LU, NL, PL, CL, PE

\*This question has been asked differently in 2021.

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



Because of their lower environmental impact



51

38

54

59

46

52

To improve your company image

34

41

44

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

37

40

30

36

29

35

43

To be able to drive in Low Emission Zone



44

24

34

39



45

26

34

39

To fulfil your employees' requests



42

27

24

30

To reduce fuel expenses

To be compliant with your CSR (Corporate Social Responsibility) policy

For tax incentives

To anticipate future restrictive public policies

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

# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY\*

## LCV Fleet

In %



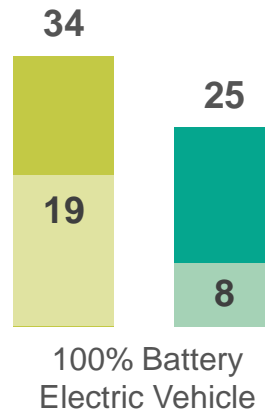
LCVs



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
IMPLEMENTED



100% Battery  
Electric Vehicle

\*This question has been asked differently in 2021.

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

# REASONS FOR IMPLEMENTING OR CONSIDERING ALTERNATIVE FUEL TECHNOLOGIES

LCV fleet

In %



LCVs



Because of their lower environmental impact

To improve your company image

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

To be able to drive in Low Emission Zone

To fulfil your employees' requests

To reduce fuel expenses

To be compliant with your CSR (Corporate Social Responsibility) policy

For tax incentives

To anticipate future restrictive public policies



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



5

# ENERGY MIX FOCUS PER ALTERNATIVE TECHNOLOGY



# HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY\*

In %



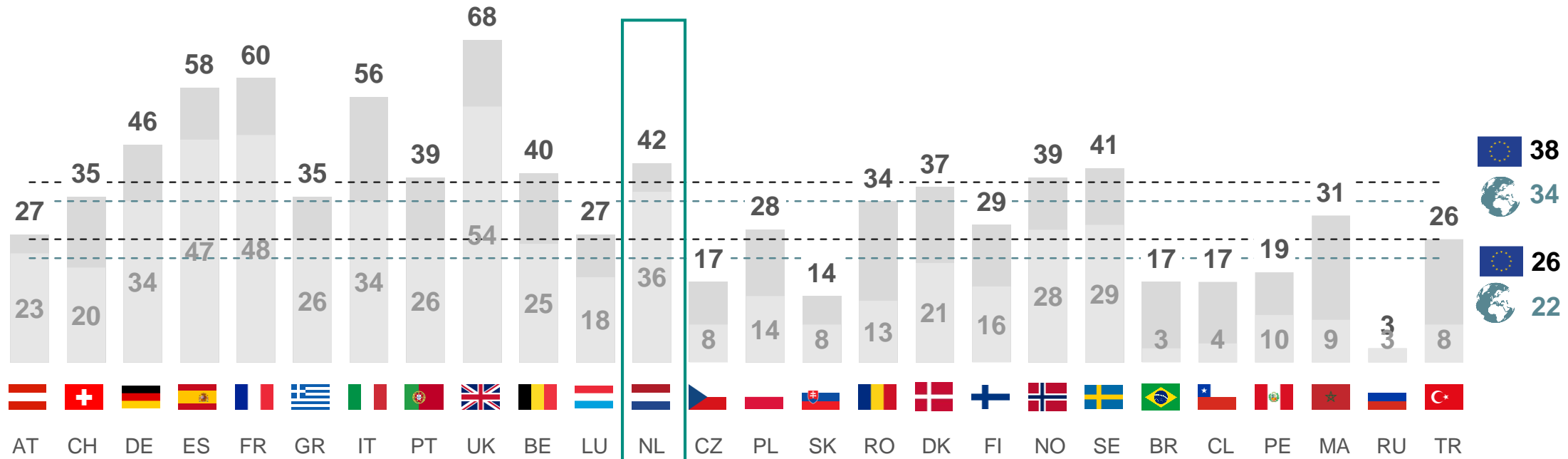
Passenger cars



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING



\*This question has been asked differently in 2021.

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\*

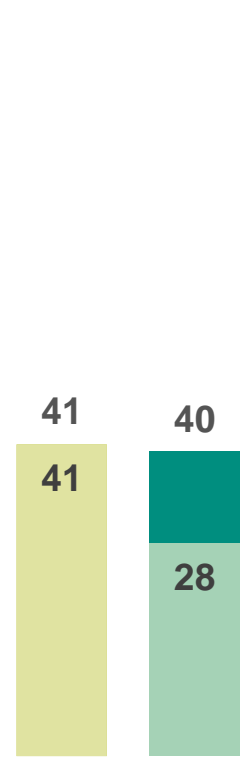
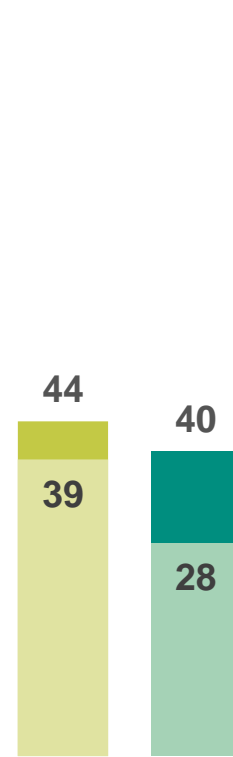
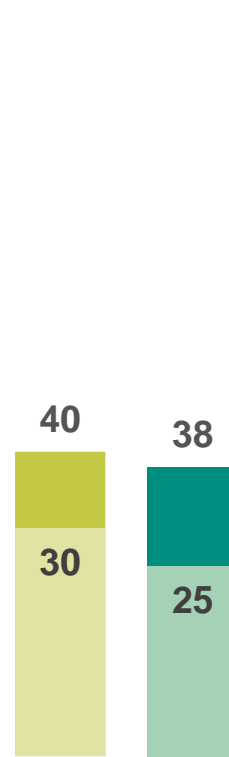
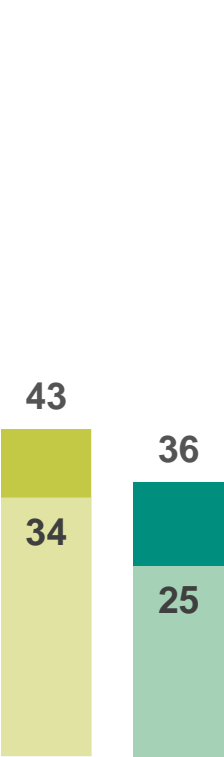
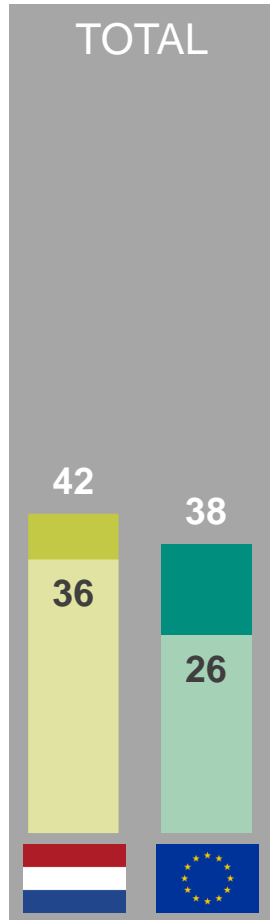
In %



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING



\*This question has been asked differently in 2021.

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

Basis: companies with passenger cars

# PLUG-IN HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY\*

In %



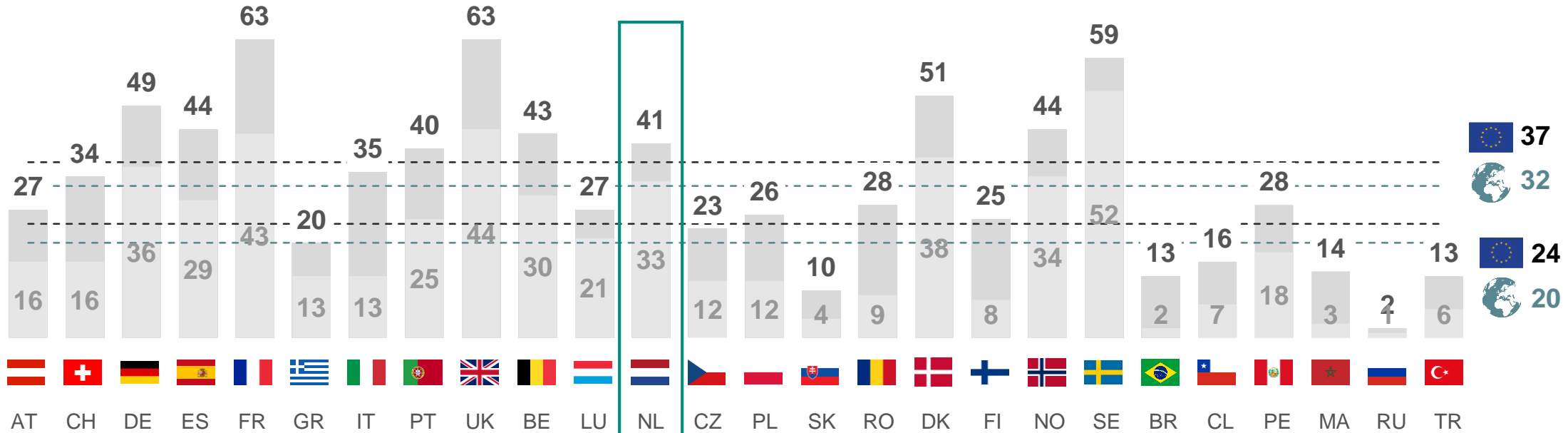
Passenger cars



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING



\*This question has been asked differently in 2021.

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\*

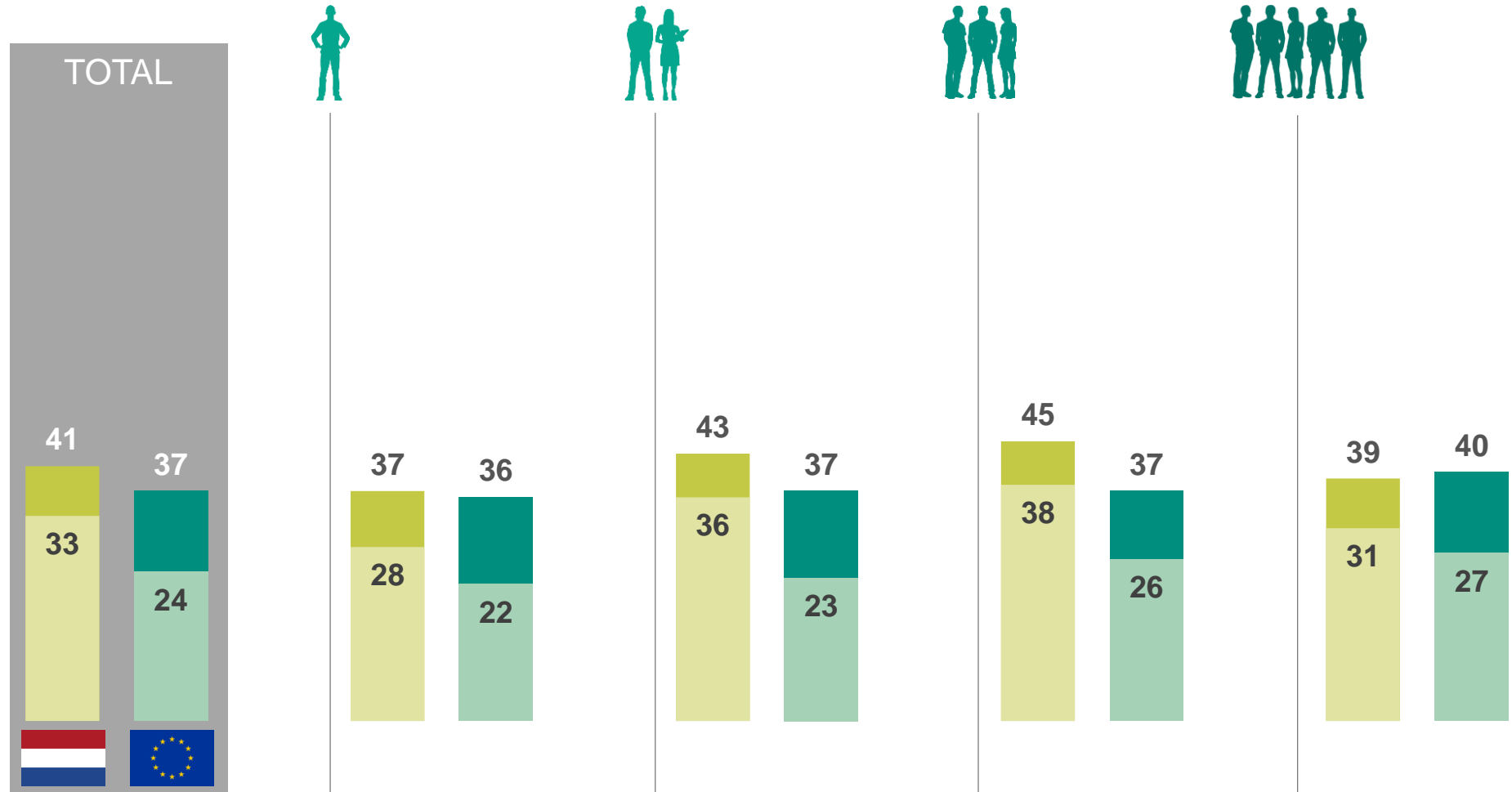
In %



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING



\*This question has been asked differently in 2021.

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 %



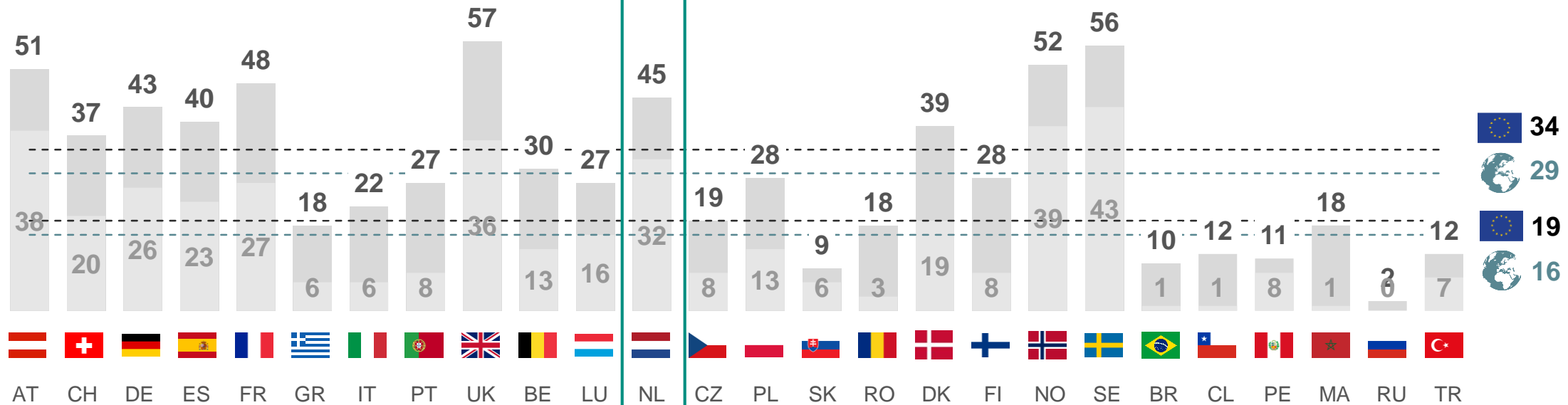
Passenger cars



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING



\*This question has been asked differently in 2021.

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 %

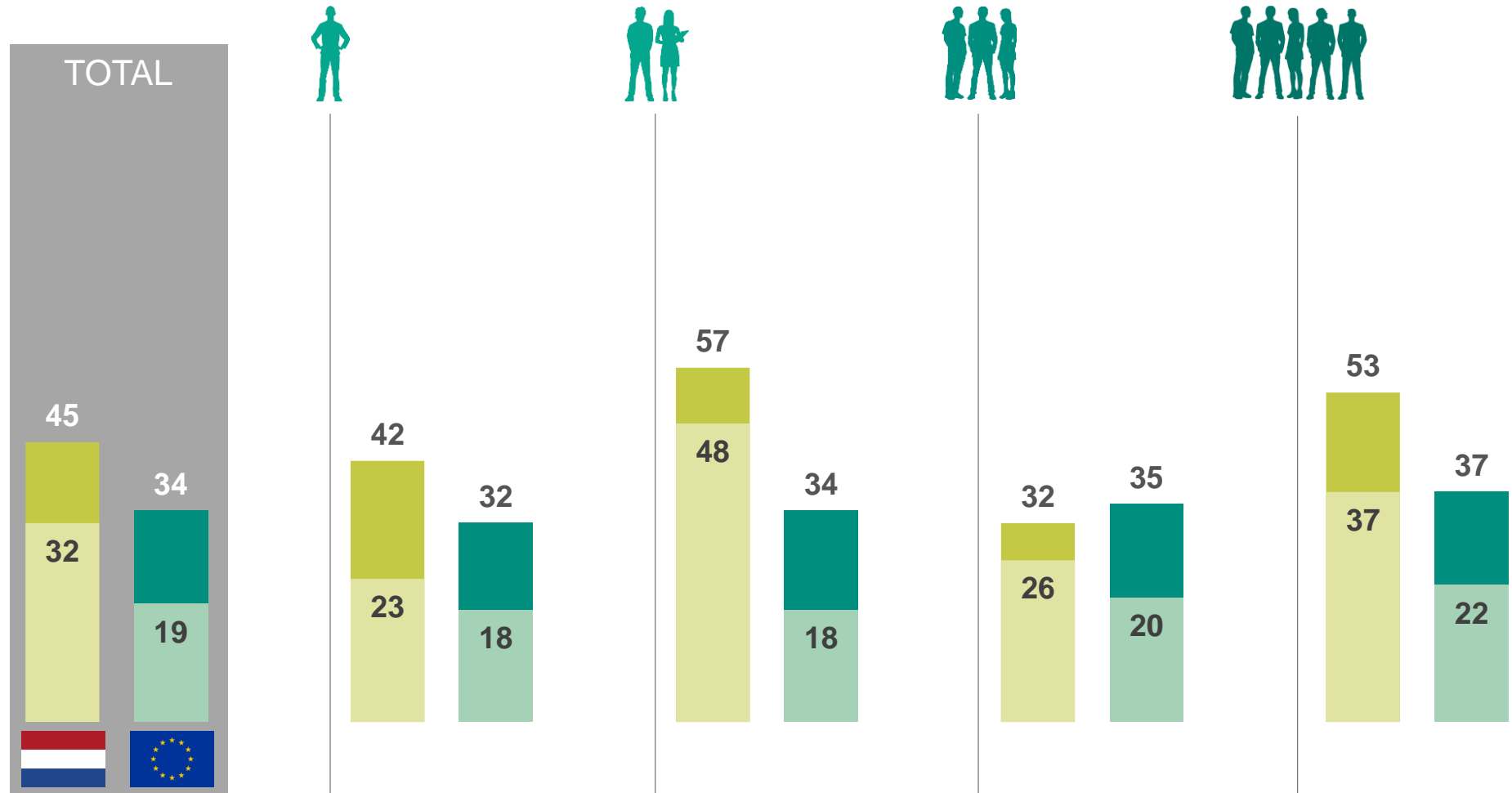
Passenger cars



ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS



ALREADY USING



\*This question has been asked differently in 2021.

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

Basis: companies with passenger cars

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

In %



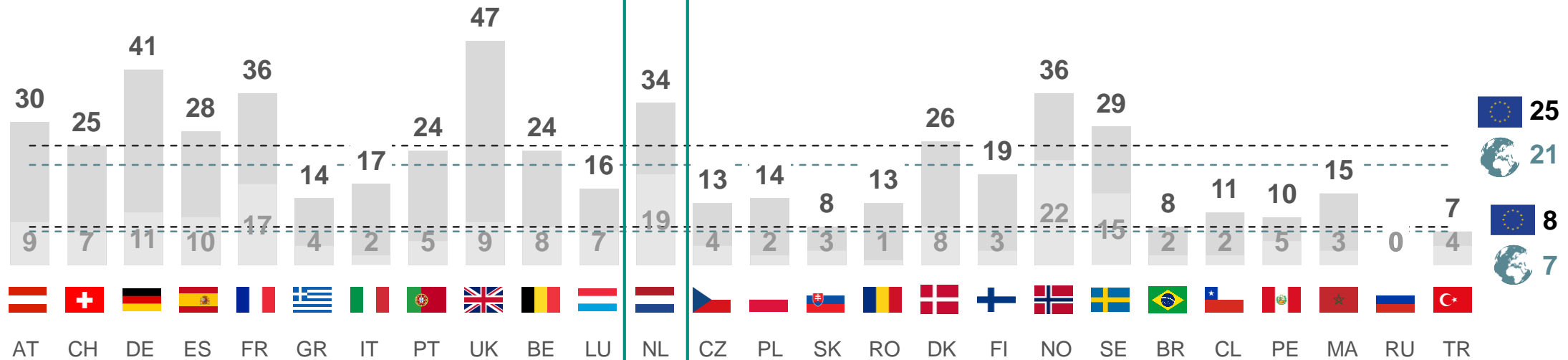
LCVs



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING



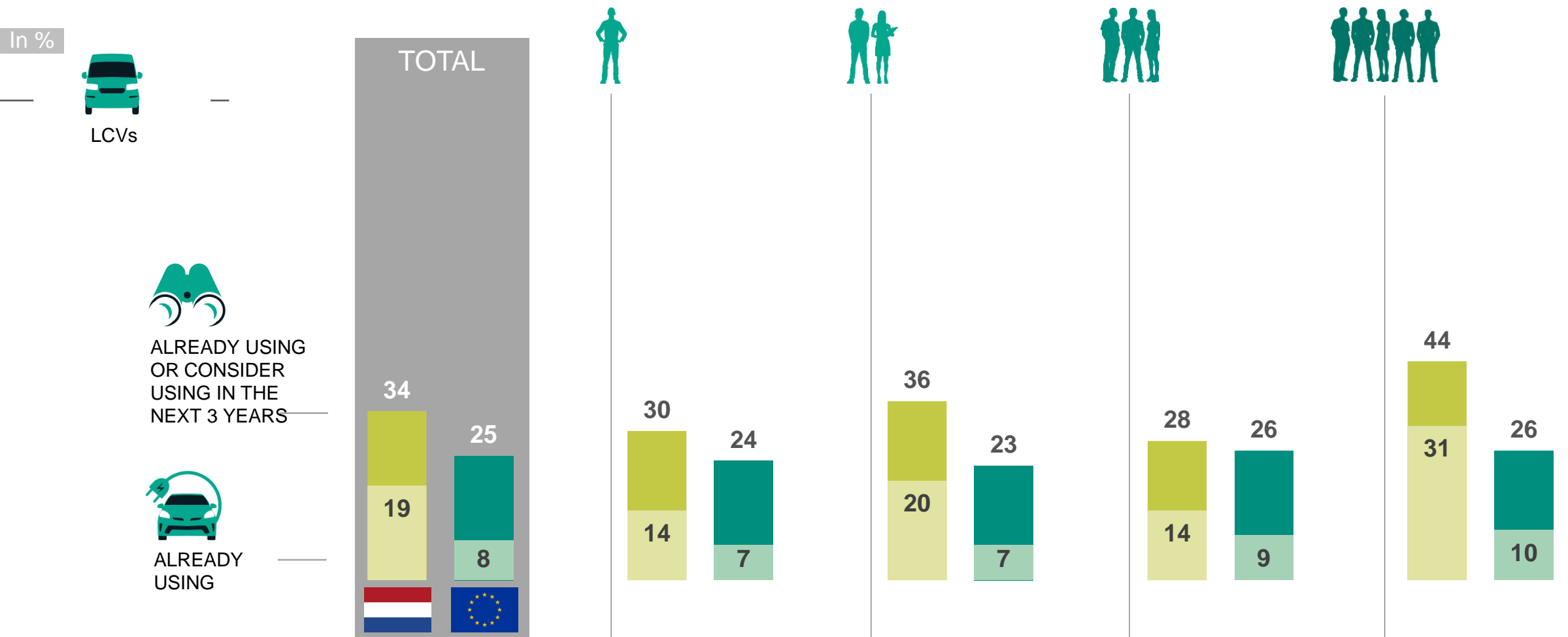
\*This question has been asked differently in 2021.

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

Basis: companies with LCVs



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



\*This question has been asked differently in 2021.

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

Basis: companies with LCVs

# CONSTRAINTS OF 100% BATTERY ELECTRIC VEHICLE USAGE

In %



Passenger cars + LCVs

do not consider implementing battery electric vehicles

46

Not enough public charging points

No charging solutions at your employees' home

The range of models is limited for this type of vehicles

Your employee's reluctance to drive electric vehicles



33% 44% ↘ 53

43% 43% ↘ 51

30% 39%

39% 40%

27% 31%

↘ 32 25% 27%

15% 18%

↗ 11

The purchase price is higher than a regular fuel car

No charging points at your company offices

The questions raised on their reliability

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

# ACCESS TO CHARGING POINTS

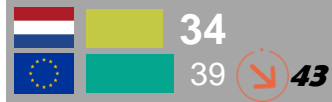
In %



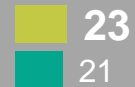
Passenger cars + LCVs

TOTAL

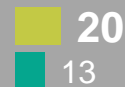
Currently no charging points installed at the company premises



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



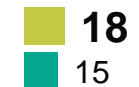
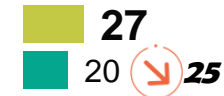
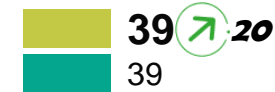
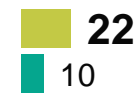
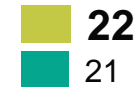
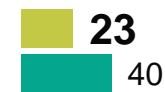
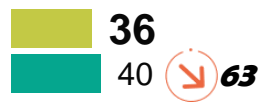
Charging points installed at the company premises and drivers charged for charging



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



Drivers have to pay for home installation of charging points



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

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

Basis: companies already using or considering Plug-in hybrid and 100% electric vehicles

6

# WHAT ARE THE PERSPECTIVES IN TERMS OF ALTERNATIVE MOBILITY SOLUTIONS?



# MOBILITY ALTERNATIVES LIST AND DEFINITIONS



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



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



**RIDE SHARING** where several employees travel in the same car to the same destination (Bolt, Faxe)



**AN APP TO BOOK MOBILITY SOLUTIONS PROVIDED BY THE COMPANY**



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



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



**PUBLIC TRANSPORT**



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

# ALTERNATIVE MOBILITY SOLUTIONS IMPLEMENTATION

At least one already implemented

In %

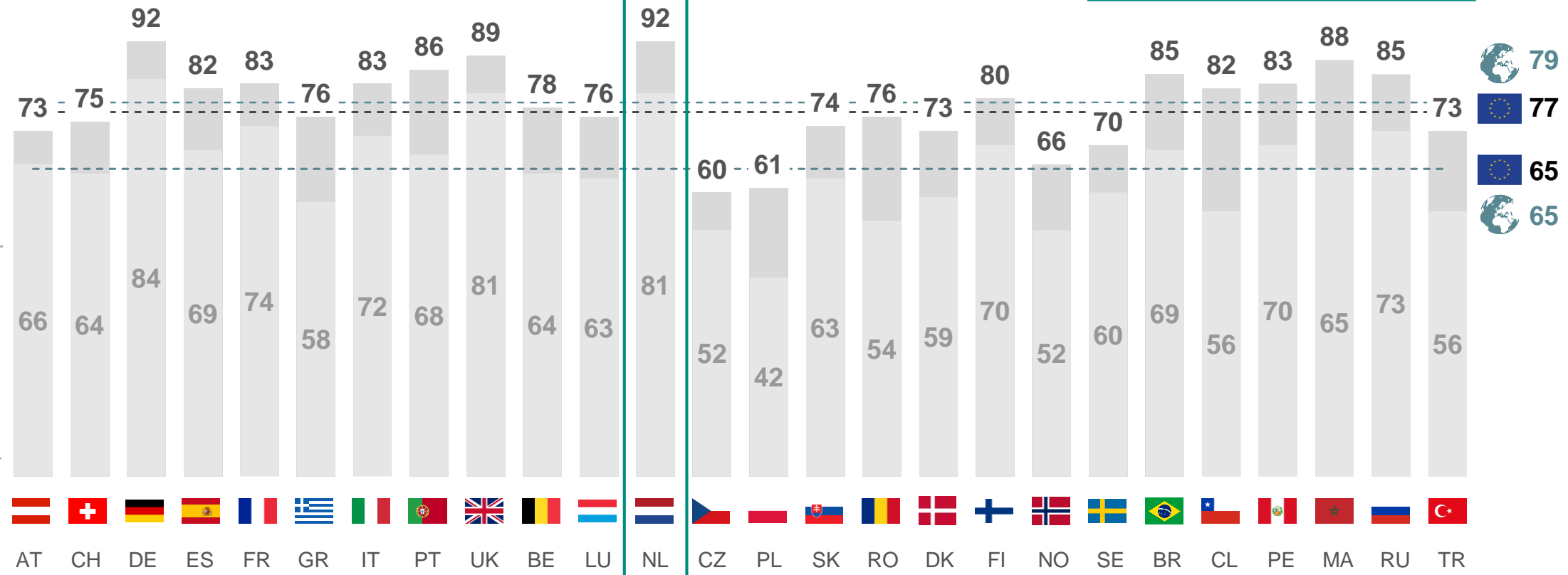
- List of the alternative mobility solutions:
- CORPORATE CAR SHARING
  - RIDE SHARING
  - BIKE SHARING
  - PUBLIC TRANSPORT
  - MOBILITY BUDGET
  - AN APP TO BOOK MOBILITY SOLUTIONS PROVIDED BY THE COMPANY
  - PRIVATE LEASE OR SALARY SACRIFICE
  - A SHORT OR MID TERM RENTAL VEHICLE



ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS



ALREADY USING



79  
77  
65  
65

Have you implemented or will you implement alternative mobility solutions in the next 3 years?  
Response scale: Already using, considered in the next 3 years, not interested  
Basis: companies with corporate vehicles = 100%

# ALTERNATIVE MOBILITY SOLUTIONS IMPLEMENTATION

At least one already implemented

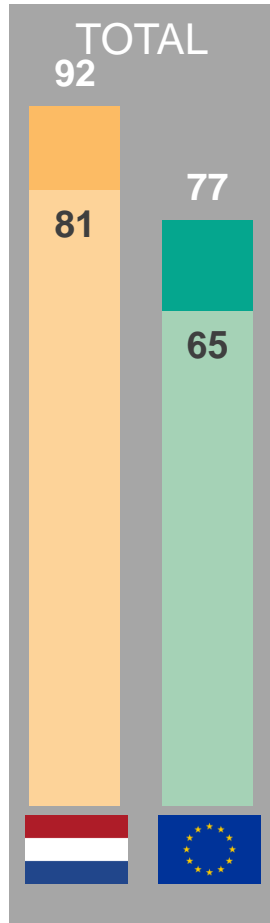
In %



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



92



82



94



99

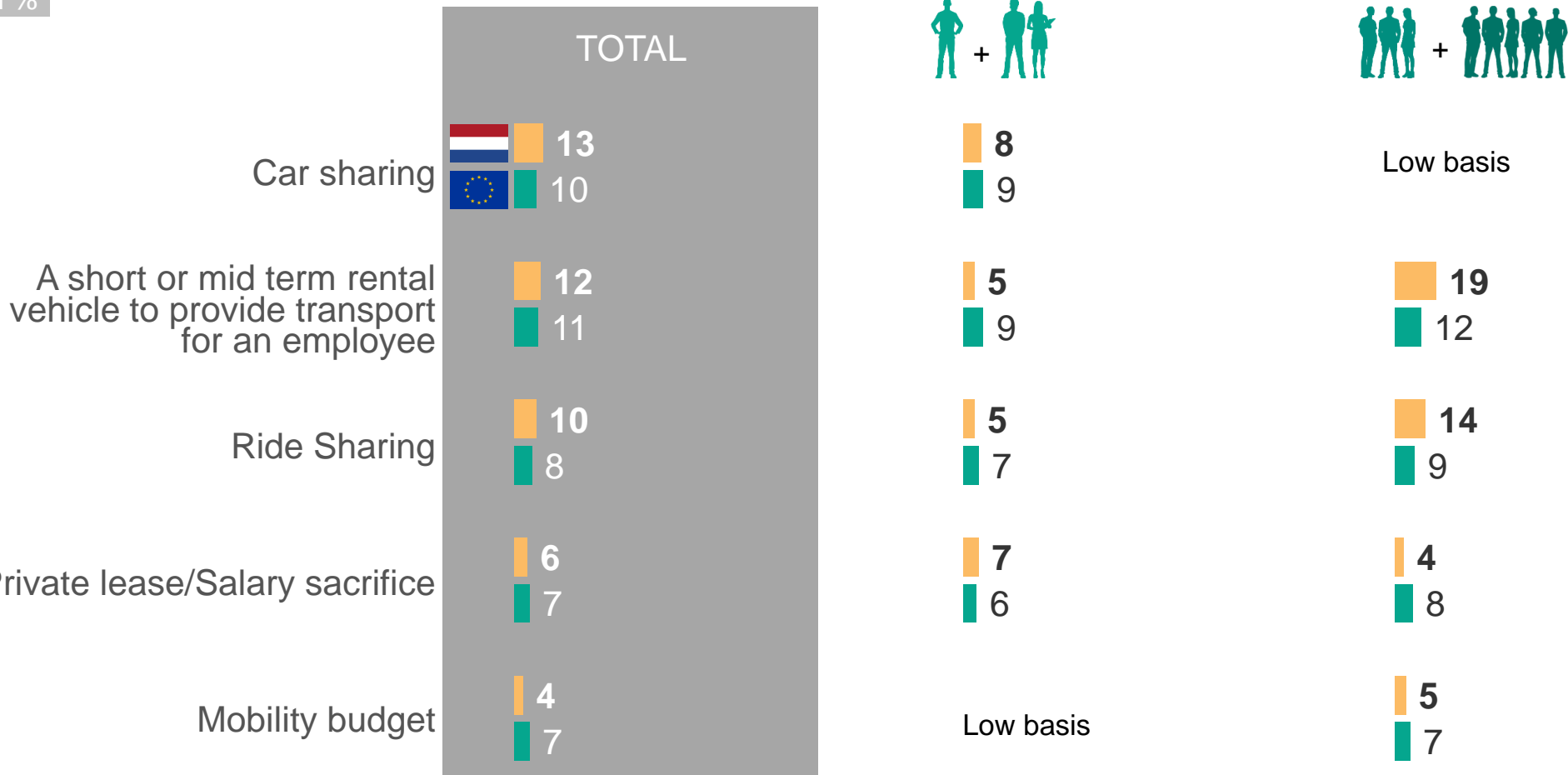


Have you implemented or will you implement alternative mobility solutions in the next 3 years?  
Response scale: Already using, considered in the next 3 years, not interested  
Basis: companies with corporate vehicles = 100%

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

Certainly

In %



\*This question hasn't been asked in 2021. Comparison possible vs 2020.  
 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

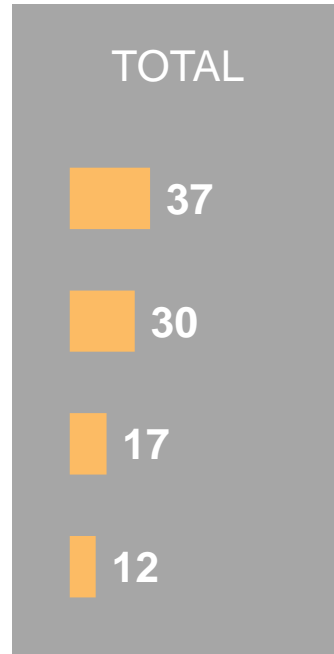


# ALTERNATIVE MOBILITY SOLUTION TOOLS

In %



Passenger cars + LCVs



Don't know

4



3



4



5



4

No dedicated tooling



Manually



A dedicated platform



One or more dedicated apps



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

# INTEREST IN OFFERING EMPLOYEES A MOBILITY BUDGET

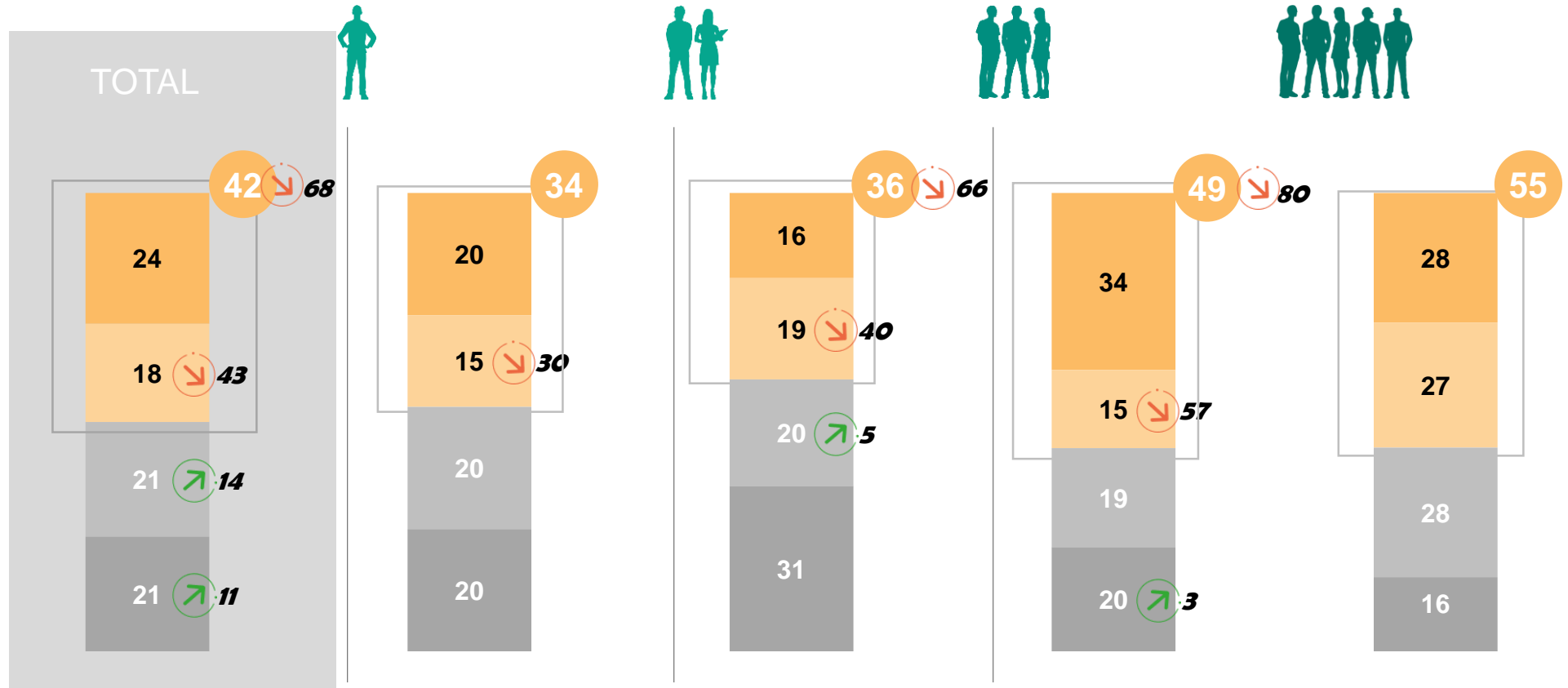
In %



Passenger cars + LCVs

**NET YES**  
(certainly + probably)

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



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

# REASONS TO OFFER A MOBILITY BUDGET

In %



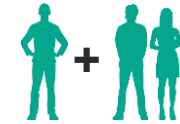
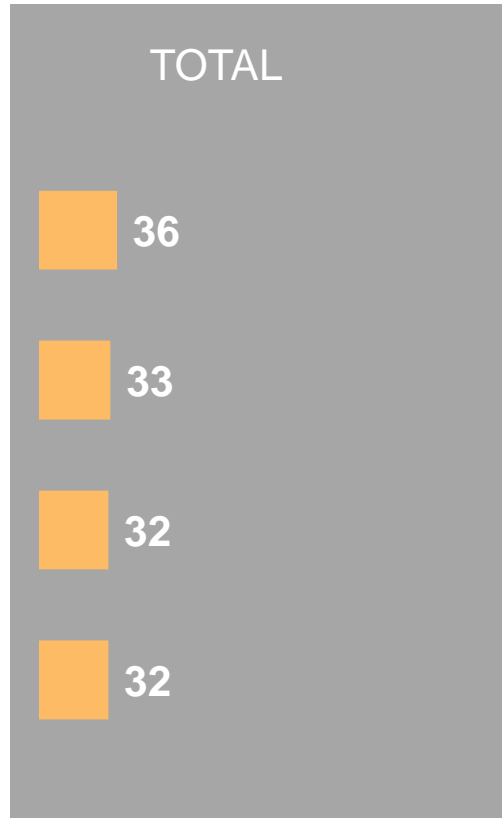
Passenger cars + LCVs

It brings lower cost of mobility

Higher productivity as a result of different use of time

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

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



# SPECIFIC STRATEGY ON THE MOBILITY CO2 FOOTPRINT

In %

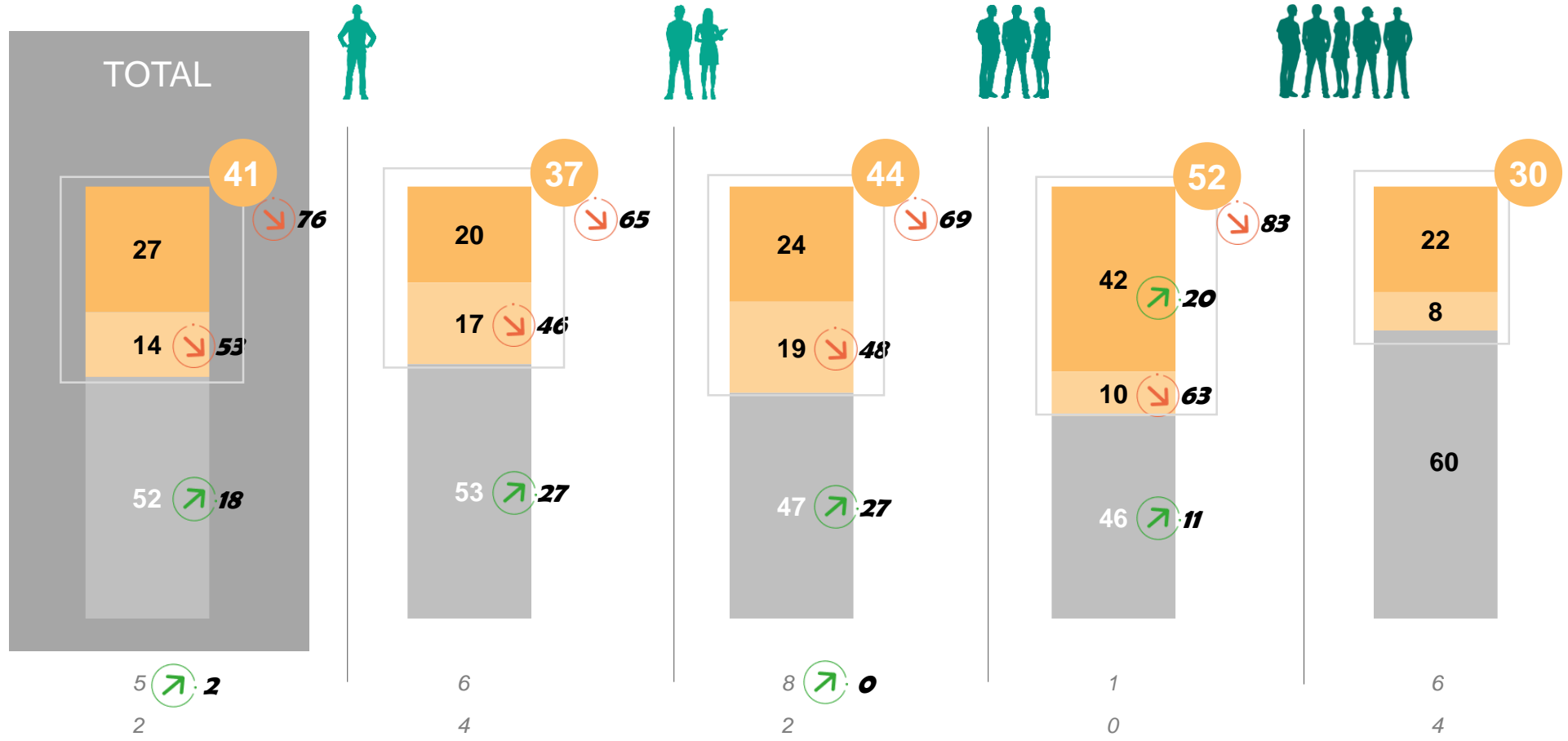


Passenger cars + LCVs

**NET** Already in place or consider

- Already in place █
- Considered █
- Not considered █

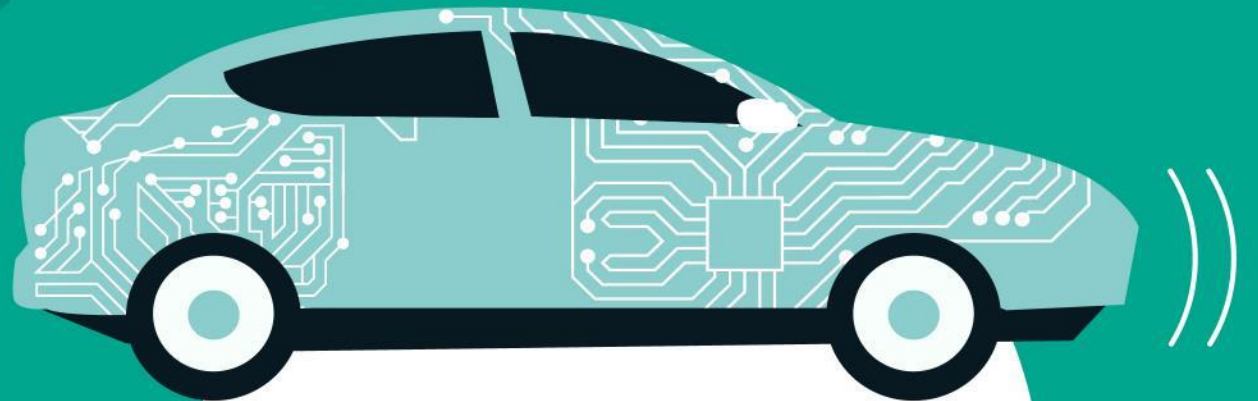
Don't know what it is  
Don't know



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

7

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



# A USE OF TELEMATICS IN LINE WITH EUROPEAN STANDARDS

1

- **In line with the European trend, one-third of Dutch companies use connected vehicles**, with a more widespread use for LCVs than for Passenger Cars (30% vs 20%).

2

- Globally, the **main reason for using telematics consists in the possibility to locate vehicles and improve vehicle security**, but for large companies the possibility to **reduce fleet costs** is even more important.

# CONNECTED VEHICLES



## USE OF TELEMATICS



32%



33%



## TOP 3 REASONS



- #1 To locate vehicles or improve vehicle security
- #2 To improve operational efficiency
- #3 To reduce fleet costs

38%

39%

30%

30%

28%

26%

# PROPORTION OF COMPANIES USING CONNECTED VEHICLES\*

All vehicles

In %



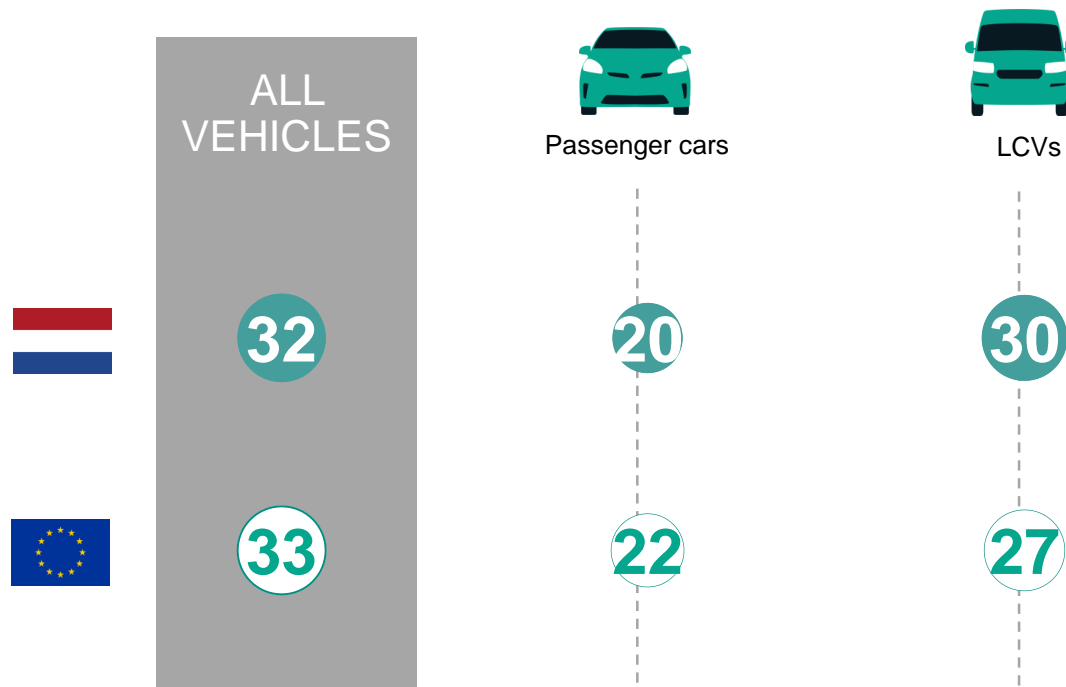
Passenger cars + LCVs

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

## HOW TO READ THE RESULTS ?

32% of companies with fleet using connected vehicles for all or part of their fleet.

20% use connected vehicles for passenger cars, while 30% use connected vehicles for LCVs.



\*This question has been asked differently in 2021, no comparison vs 2021

*Is your fleet connected thanks to a telematic tool?*

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

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



# PROPORTION OF COMPANIES USING CONNECTED VEHICLES\*

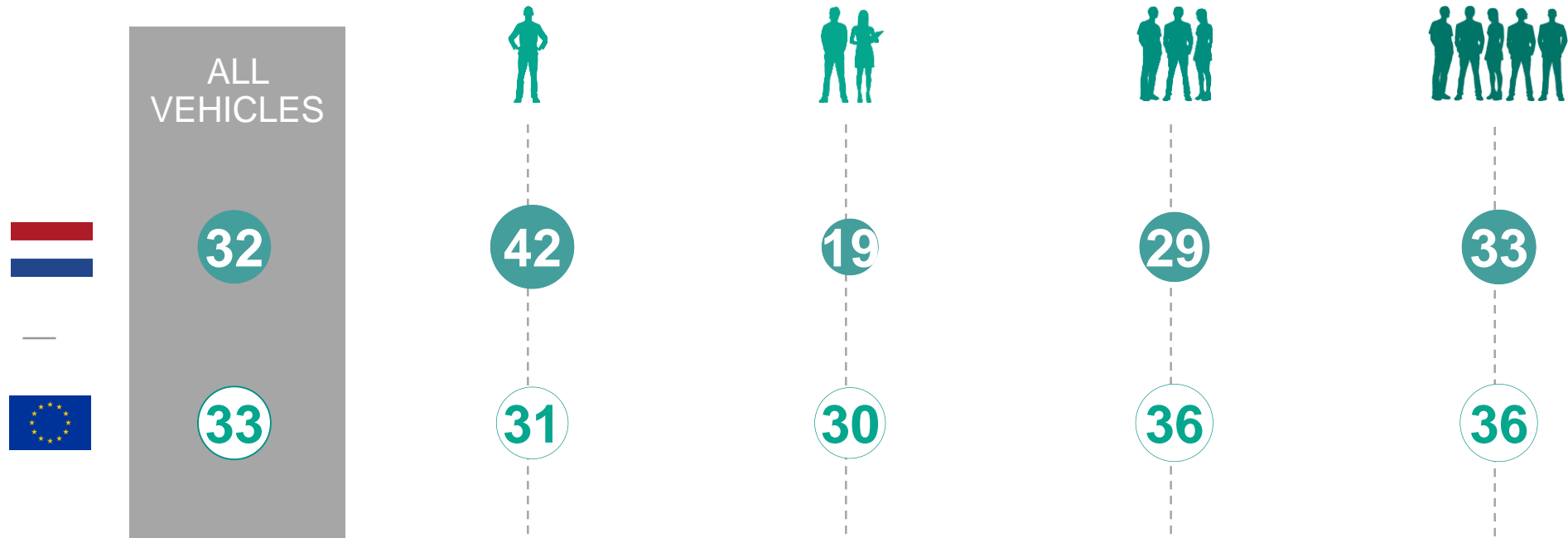
All vehicles

In %



Passenger cars + LCVs

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



\*This question has been asked differently in 2021, no comparison vs 2021

*Is your fleet connected thanks to a telematic tool?*

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

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

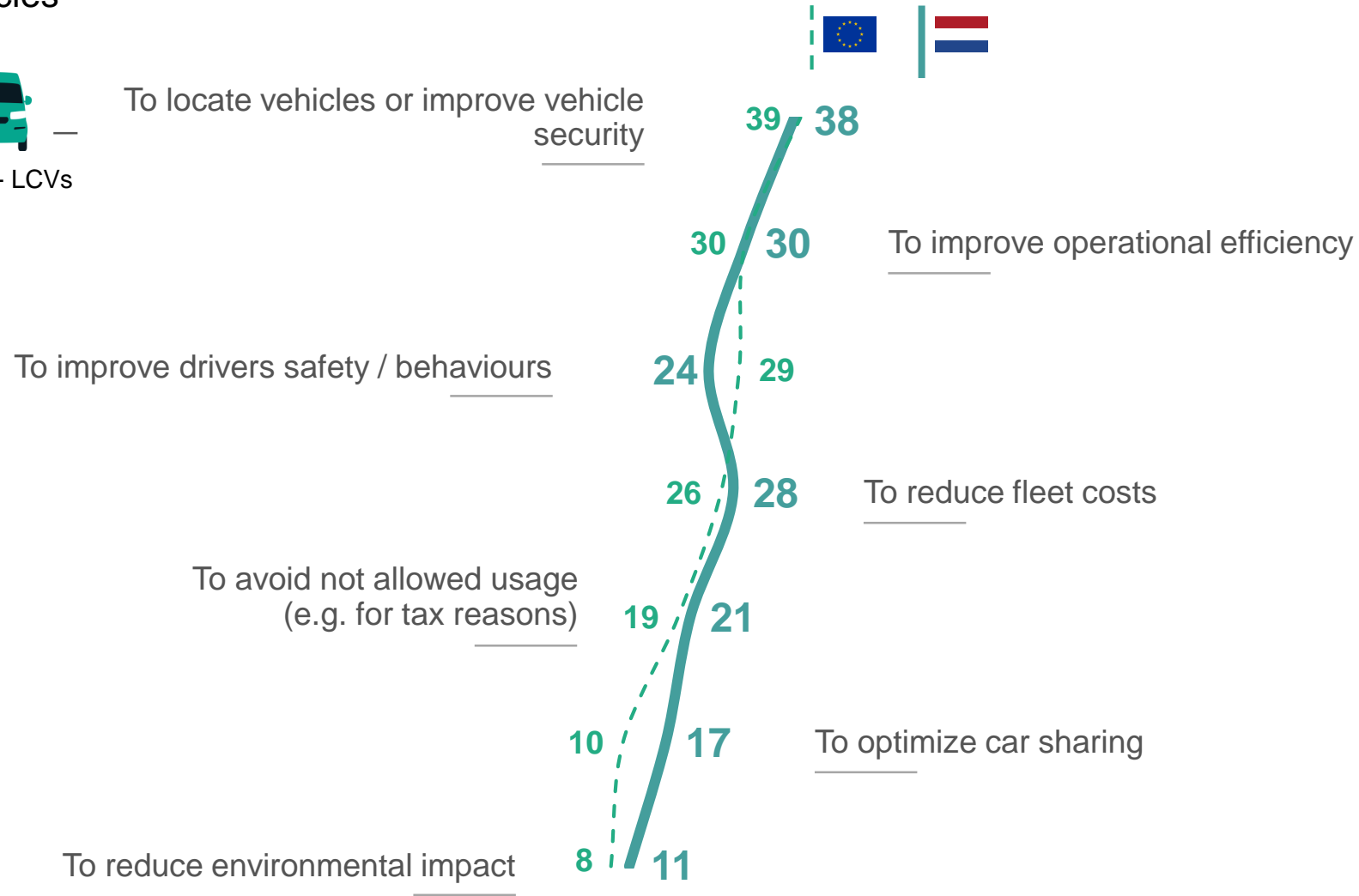
# REASONS FOR USING CONNECTED VEHICLES

All vehicles

In %



Passenger cars + LCVs



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

# REASONS FOR USING CONNECTED VEHICLES

All vehicles - Focus on 1 to 99

In %



Passenger cars + LCVs



+



To locate vehicles or improve vehicle security



37 37

To improve operational efficiency

29 26

To improve drivers safety / behaviours

28 28

To reduce fleet costs

15 25

To avoid not allowed usage (e.g. for tax reasons)

17 22

To optimize car sharing

11 23

To reduce environmental impact

9 9

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

# REASONS FOR USING CONNECTED VEHICLES

All vehicles - Focus on 100 and more

In %



Passenger cars + LCVs



To locate vehicles or improve vehicle security

40 39



To improve operational efficiency

32 36

To improve drivers safety / behaviours

20 29

To reduce fleet costs

27 45

To avoid not allowed usage (e.g. for tax reasons)

20 21

To optimize car sharing

9 9

To reduce environmental impact

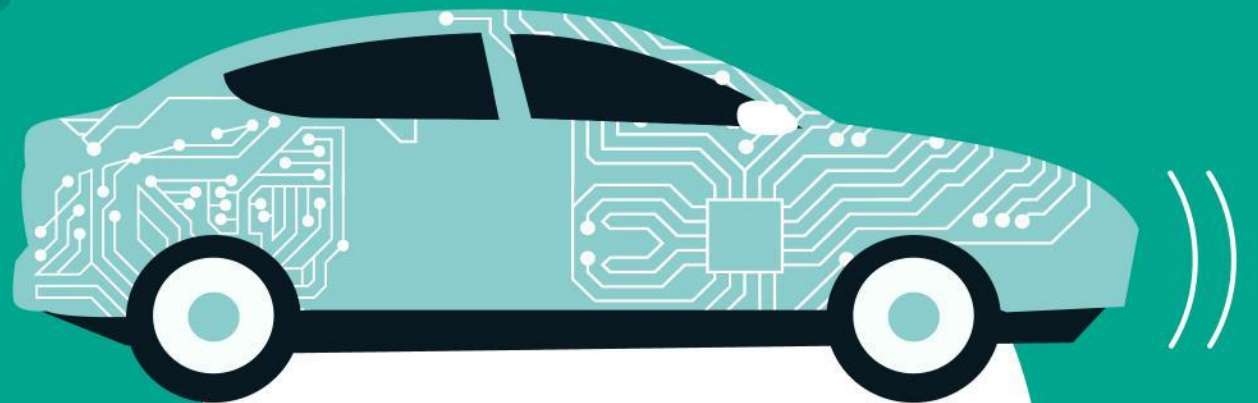
8 14

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

7

# CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY

## A. PASSENGER CARS



# PROPORTION OF COMPANIES USING CONNECTED VEHICLES\*

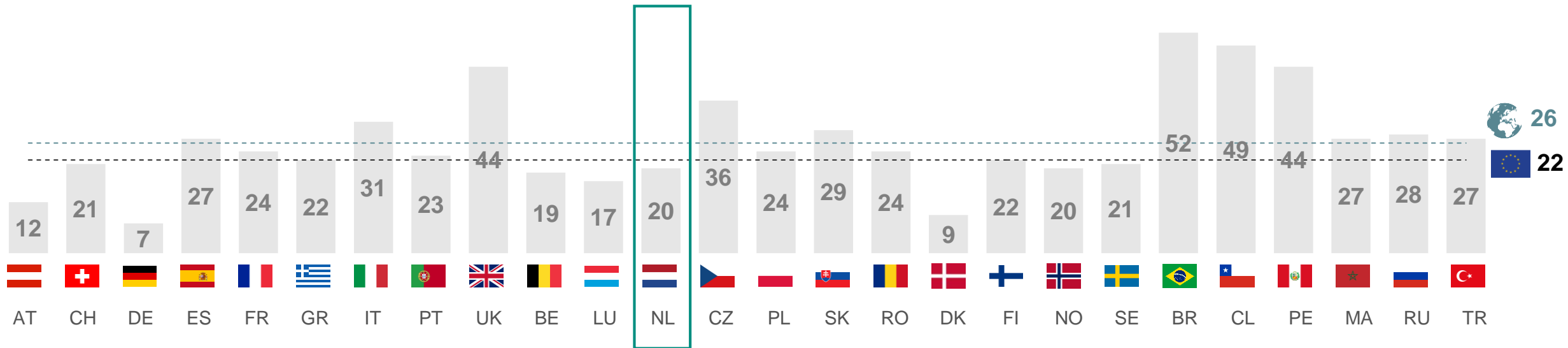
Passenger cars

In %



Passenger cars

PROPORTION OF COMPANIES USING CONNECTED VEHICLES FOR THEIR PASSENGER CARS



*Is your fleet connected thanks to a telematic tool?  
Telematics enables transmission of data to the fleet manager to monitor fuel consumption, driver behaviour, vehicle location, driver's impact on environment... from vehicles on the move. Data is transmitted by means of an original or after sales equipment or box installed in the vehicle. Telematics do not include data transmission by the mean of the users' smartphones.  
Basis: companies with corporate passenger cars / companies with corporate LCVs*

# PROPORTION OF COMPANIES USING CONNECTED VEHICLES\*

## Passenger cars

In %

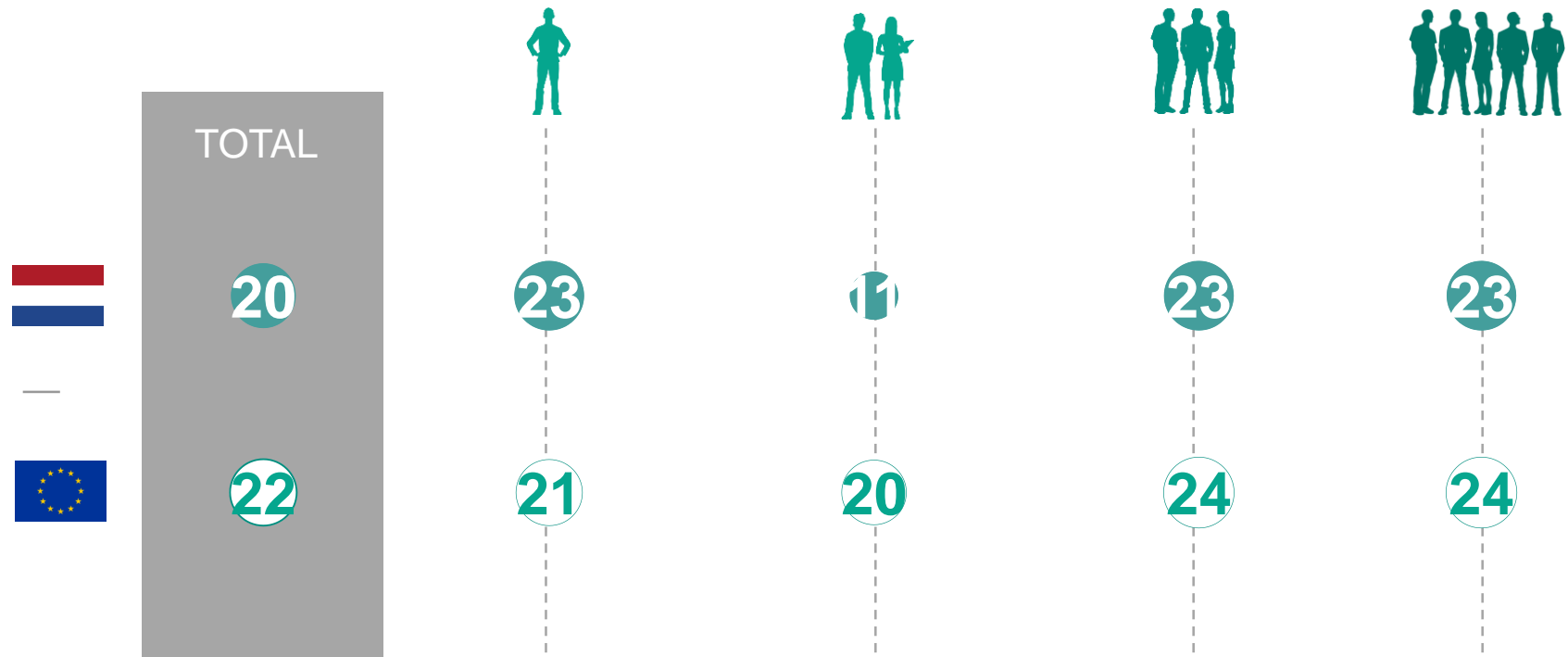


Passenger cars

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

HOW TO READ THE RESULTS ?

20% use connected vehicles for passenger cars.



\*This question has been asked differently in 2021, no comparison vs 2021.

Is your fleet connected thanks to a telematic tool?

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

Basis: companies with at least one passenger car in fleet

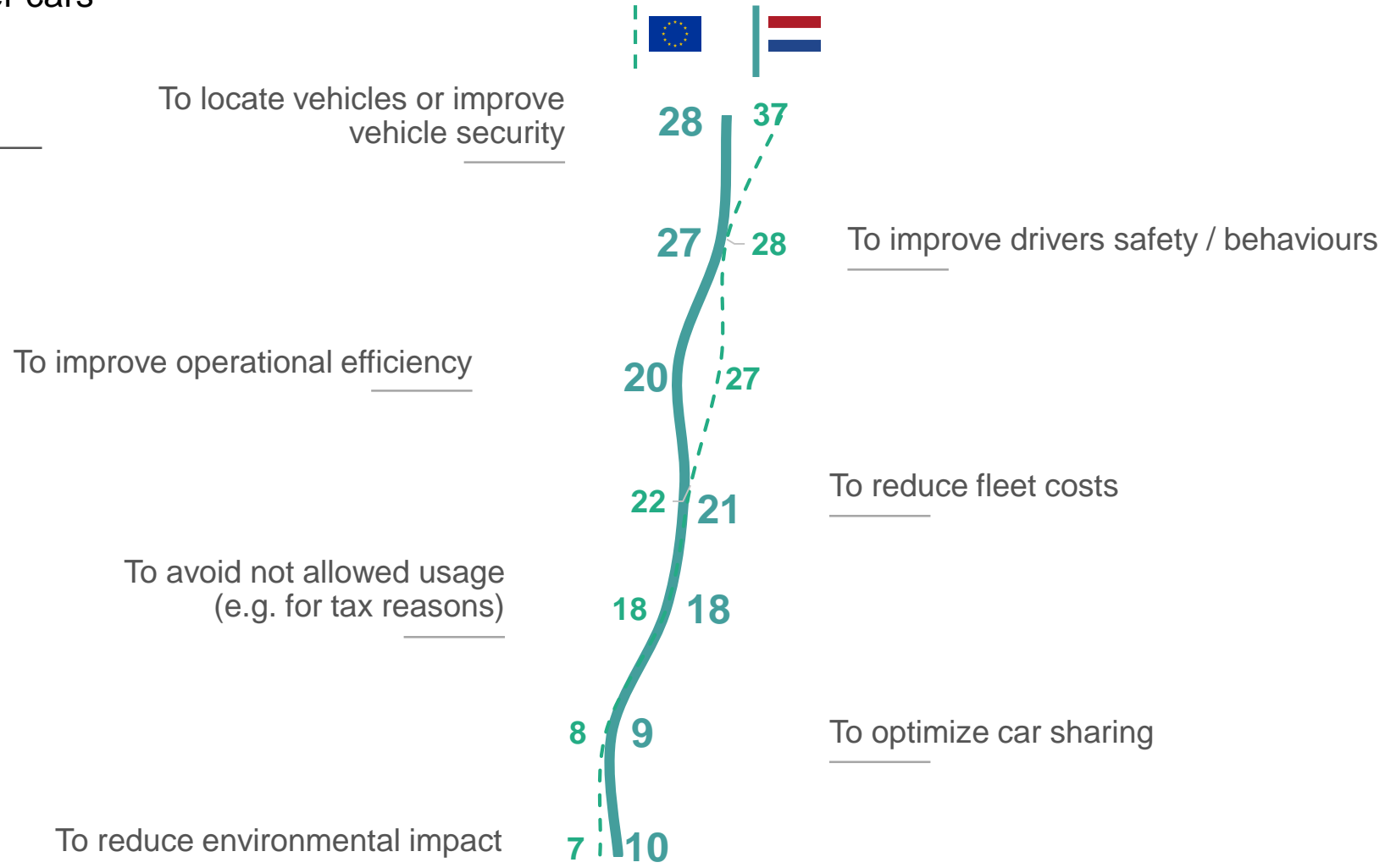
# REASONS FOR USING CONNECTED VEHICLES

## Passenger cars

In %



Passenger cars



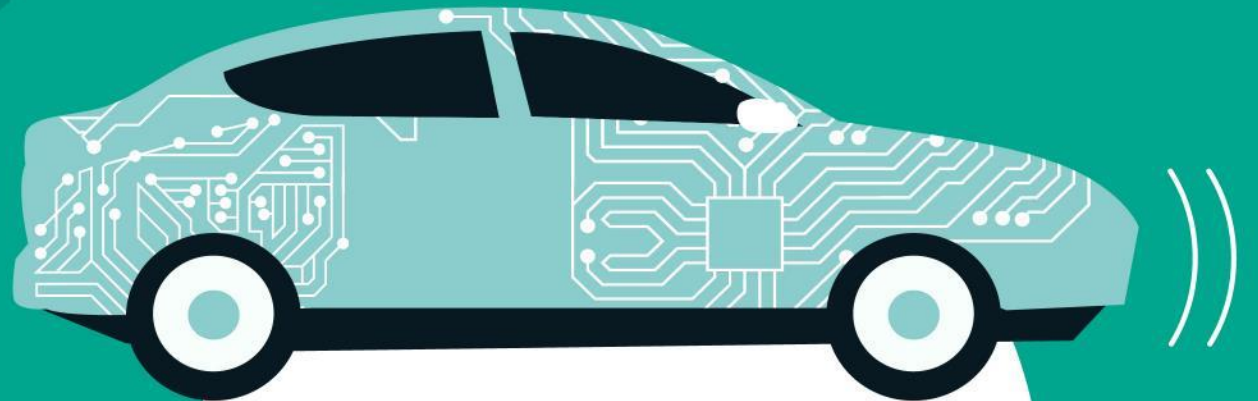
What are the two main reasons why your fleet is connected by Telematics?  
Basis: companies with connected passenger cars thanks to Telematics



7

# CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY

B. LCVs



# PROPORTION OF COMPANIES USING CONNECTED VEHICLES

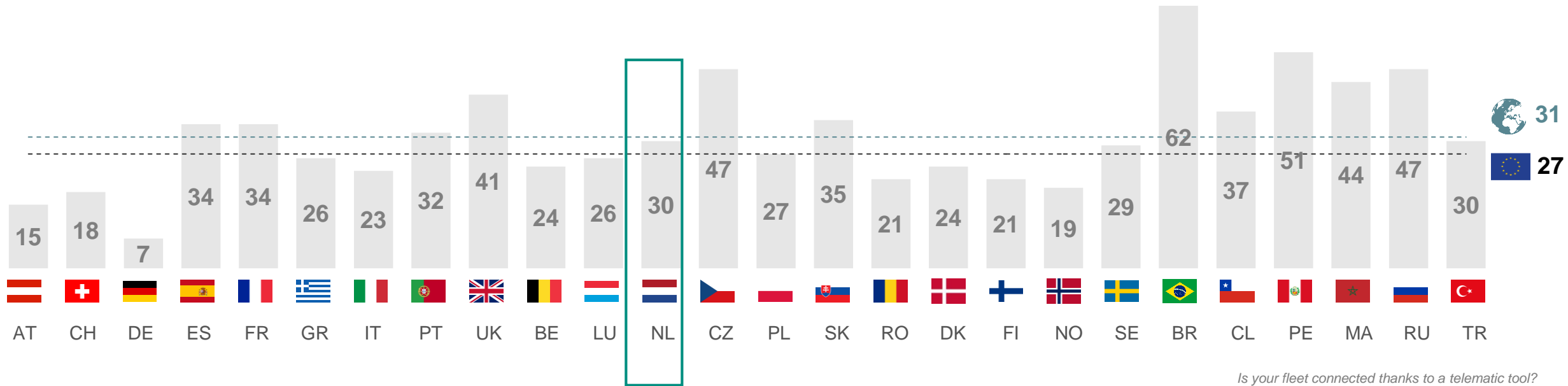
LCVs

In %



LCVs

PROPORTION OF COMPANIES USING CONNECTED VEHICLES FOR THEIR LCVs



Is your fleet connected thanks to a telematic tool?  
 Telematics enables transmission of data to the fleet manager to monitor fuel consumption, driver behaviour, vehicle location, driver's impact on environment... from vehicles on the move. Data is transmitted by means of an original or after sales equipment or box installed in the vehicle. Telematics do not include data transmission by the mean of the users' smartphones.  
 Basis: companies with corporate passenger cars / companies with corporate LCVs

# PROPORTION OF COMPANIES USING CONNECTED VEHICLES\*

LCVs

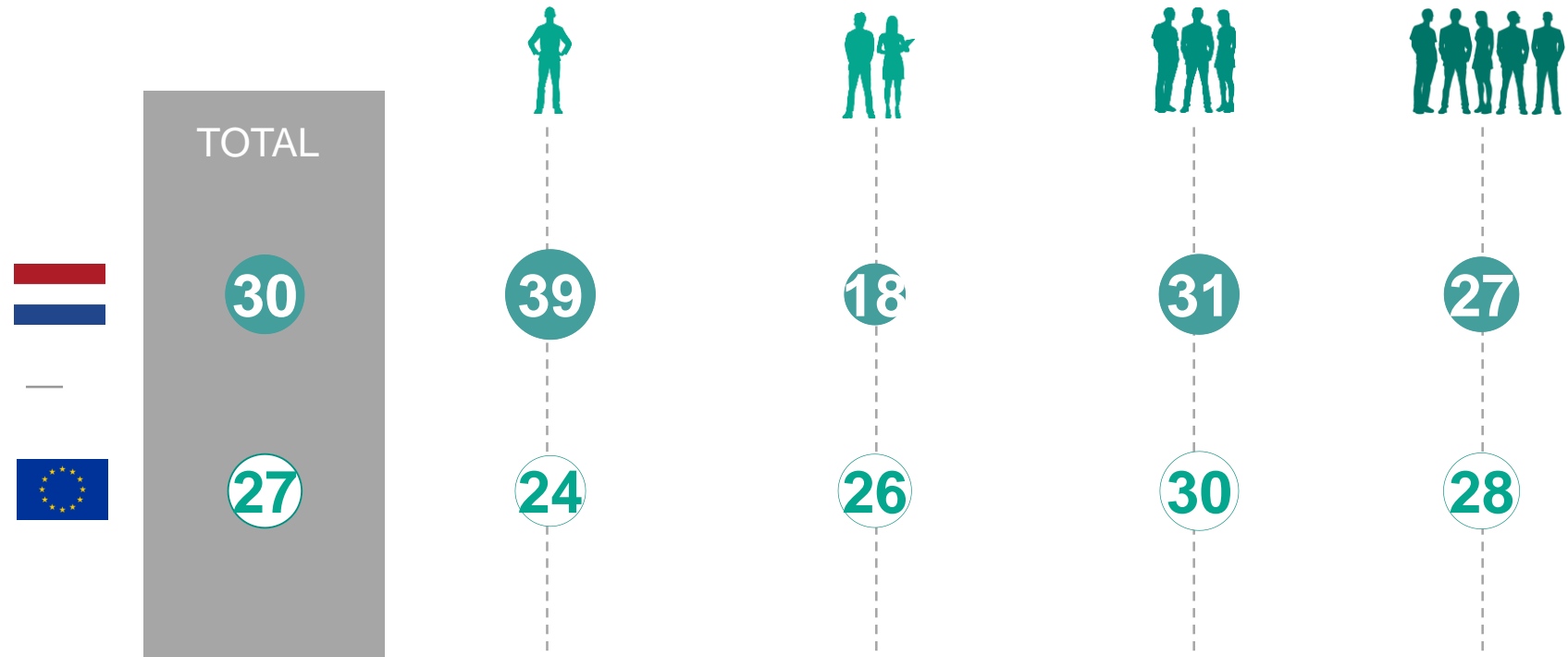
In %



LCVs

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

HOW TO READ THE RESULTS ?  
30% use connected vehicles for LCVs.



\*This question has been asked differently in 2021, no comparison vs 2021.

Is your fleet connected thanks to a telematic tool?

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

Basis: companies with at least one LCV car in fleet

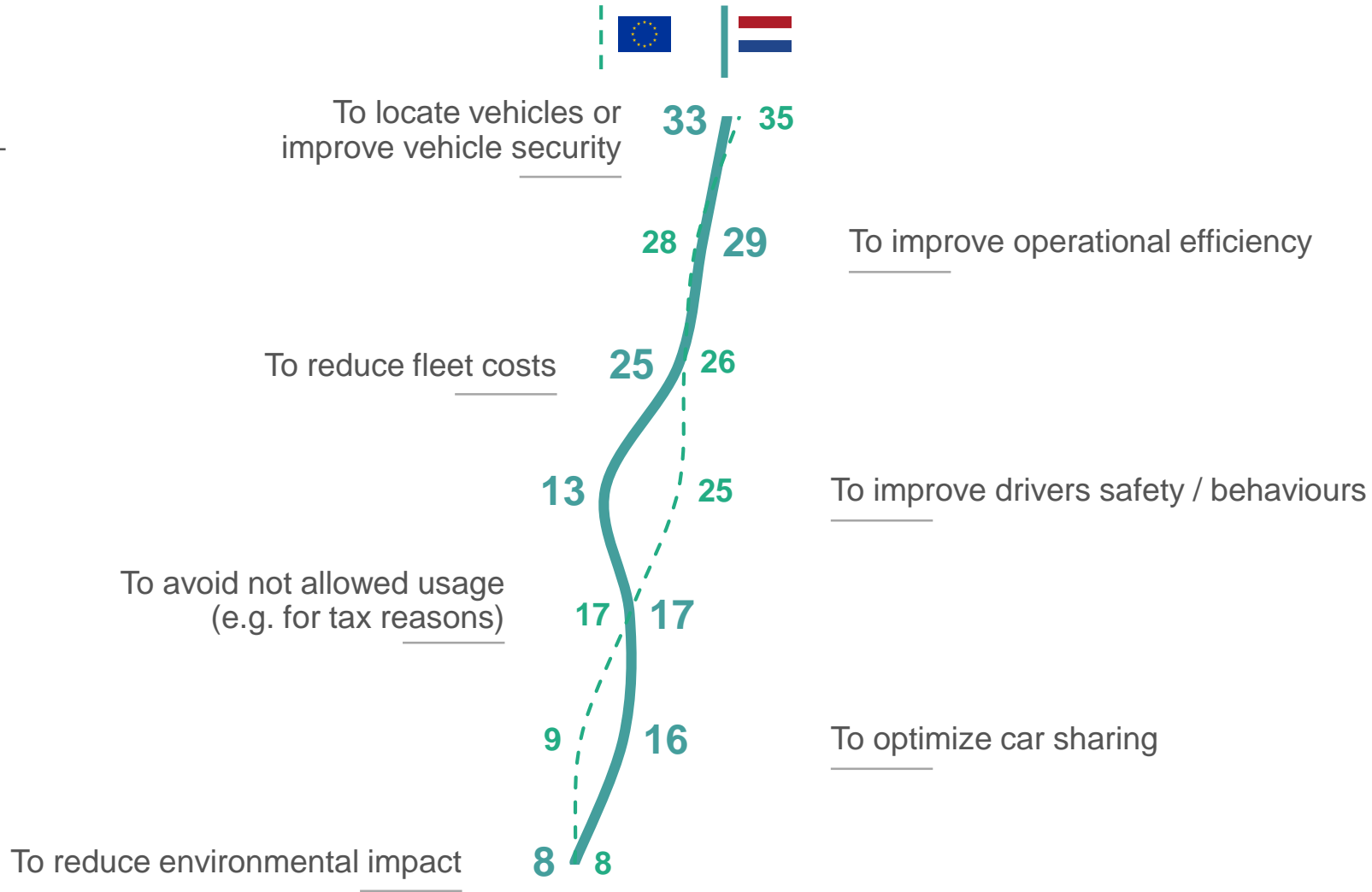
# REASONS FOR USING CONNECTED VEHICLES

LCVs

In %



LCVs

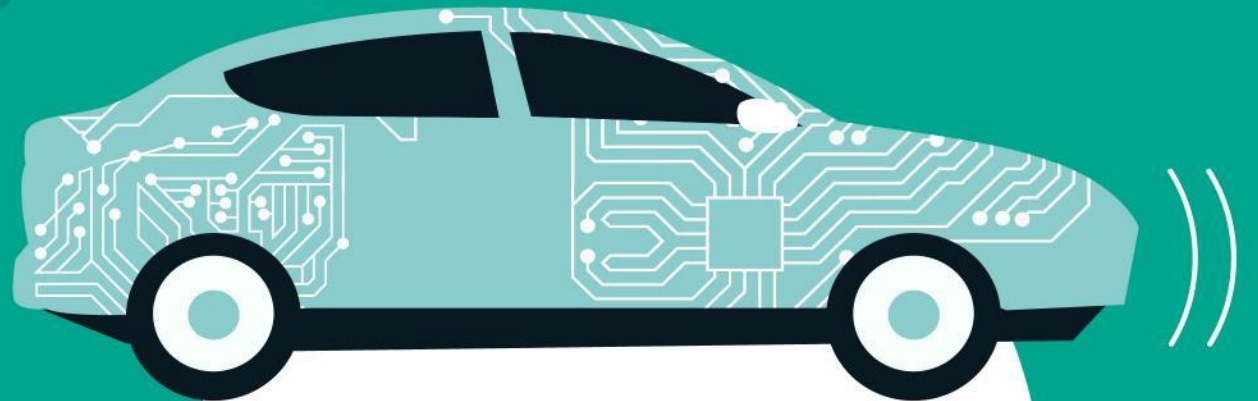


What are the two main reasons why your fleet is connected by Telematics?  
Basis: companies with connected LCVs thanks to Telematics

7

# CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY

## C. ROAD SAFETY



# ACTIONS SET UP TO INCREASE ROAD SAFETY

In %



Passenger cars + LCVs

Yes, already implemented

**NET** Already implemented or consider

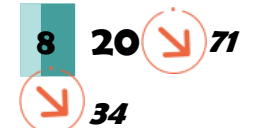
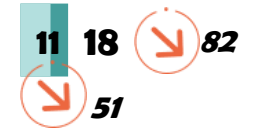
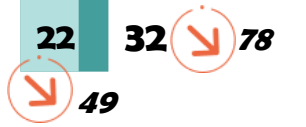
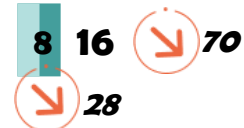
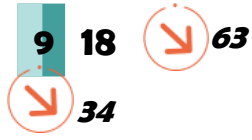
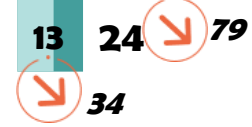
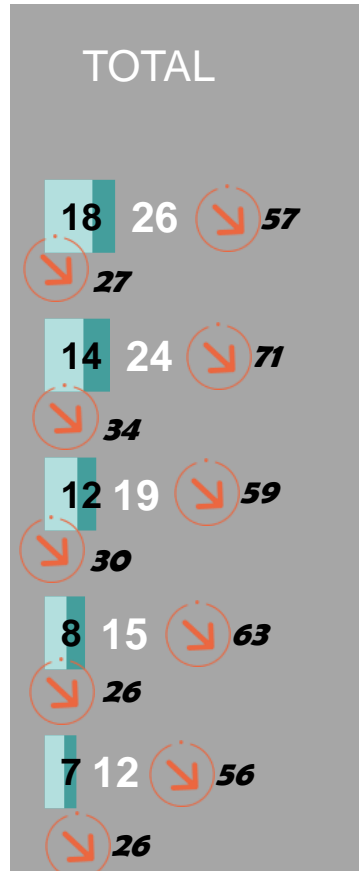
Adding an additional equipment (aftermarket / retrofit) in order to alert the driver

Buying vehicles with native device relating to road safety on it

Real world driving style analysis

Smartphone blocking


E-learning



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



**Thank you**



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