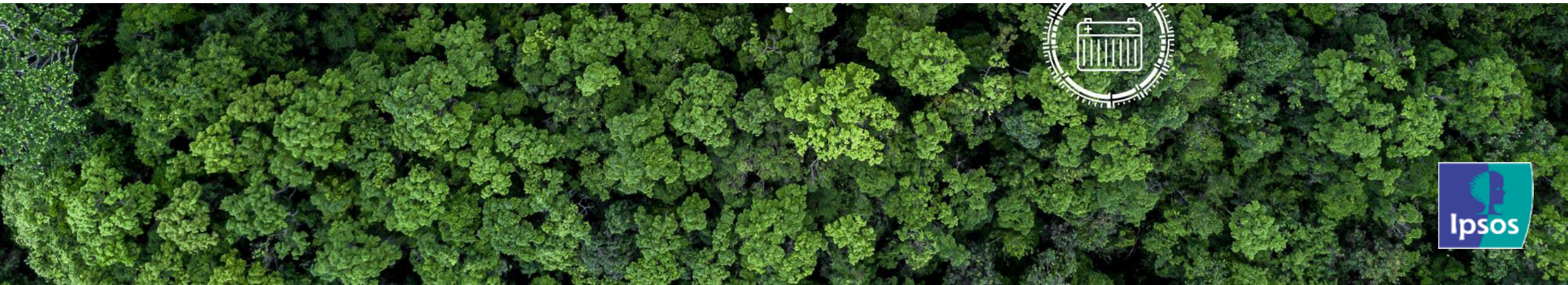


MOBILITY AND FLEET BAROMETER 2024



2024 MOBILITY AND FLEET BAROMETER

01
Context and methodology p3

02
Executive summary p11

03
What are the main characteristics of the fleets? p17

04
How are companies financing their fleet? p47

05
What changes are to be expected in the near future regarding energy mix? p58

06
What are the perspectives in terms of mobility solutions ? p109

07
What are the usages in terms of connected vehicles, digital tools and road safety equipments? p142

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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

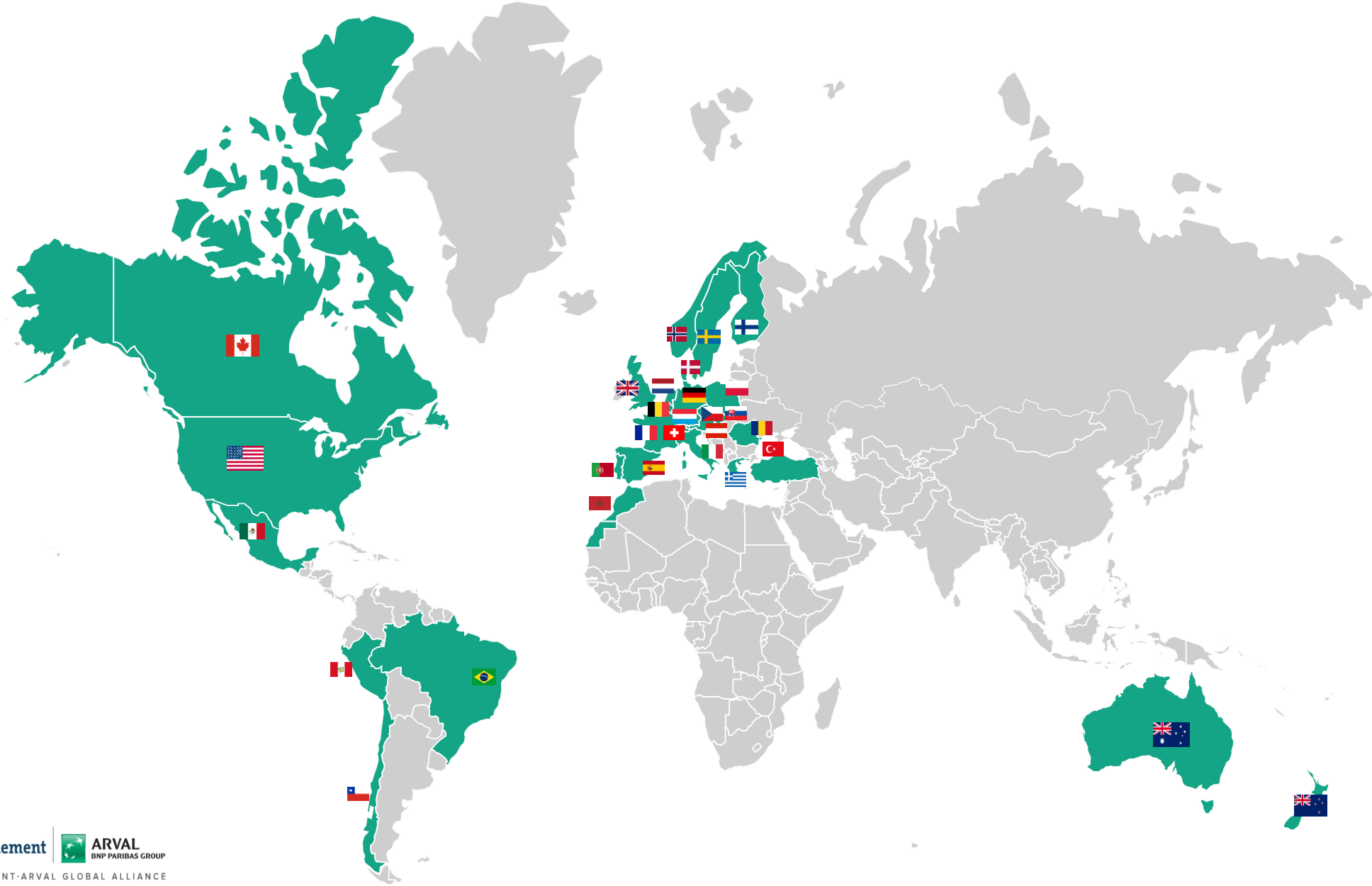
HOW DO MOBILITY SOLUTIONS IMPACT FLEET MANAGEMENT?

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SCOPE OF THE SURVEY : 30 COUNTRIES



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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

CATI SYSTEM
(Computer Assisted Telephone Interviewing)
Recruitment by telephone



FIELDWORK PERIOD

AUG 21 → NOV 10



TARGET

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



QUOTAS

COMPANY SIZE & SECTOR



SAMPLE

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



DURATION OF INTERVIEW

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)/

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NUMBER OF INTERVIEWS CONDUCTED IN AUSTRALIA

Perimeter of the survey: companies owning at least 1 vehicle

Companies with Less than 10 empl.
100 INTERVIEWS

Companies with 10 - 99 empl.
58 INTERVIEWS

Companies with 100 - 249 empl.
88 INTERVIEWS

Companies with 250 empl. or more
54 INTERVIEWS

1 to 99 employees
158 INTERVIEWS

100 employees and more
142 INTERVIEWS

SAMPLE STRUCTURE IN AUSTRALIA

Company size & sector

In %

					TOTAL
Construction Building Construction General Contractors And Operative Builders / Heavy Construction Other Than Building Construction Contractors / Construction Special Trade Contractors	18	11	22	25	19
Industry Mining, oil & gas, Manufacturing (e.g. food, tobacco, textile, wood, furniture, printing, publishing, chemicals, fabricated metal products, electronic, machinery, etc…)	4	7	4	4	5
Services Finance / transportation / Hotels, Rooming Houses, Camps, And Other Lodging Places / Personal Services / Business Services / Automotive Repair, Services, And Parking / Motion Pictures / Amusement And Recreation Services / Health Services / Legal Services / Social Services / Museums, Art Galleries, And Botanical And Zoological Gardens / Membership Organizations / Engineering, Accounting, Research, Management, And Related Services / Private Households	63	62	54	47	57
Trade Building Materials, Hardware, Garden Supply, And Mobile Home Dealers / General Merchandise Stores Food Stores / Automotive Dealers And Gasoline Service Stations / Apparel And Accessory Stores / Home Furniture, Furnishings, And Equipment Stores / Eating And Drinking Places / Miscellaneous / Retail / Wholesale trade	16	20	20	25	19
Weight of each company size segment	33	20	27	20	

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.

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MOBILITY SOLUTIONS LIST AND DEFINITIONS



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



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



PUBLIC TRANSPORT



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



AN APP PROVIDED BY THE COMPANY TO BOOK MOBILITY SOLUTIONS



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)



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



CAR OR CASH ALLOWANCE

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2

EXECUTIVE SUMMARY





INSIGHT 1: AUSTRALIAN COMPANIES ARE OPTIMISTIC FOR THE FUTURE OF THEIR FLEET

#1

MITIGATING THE TCO INCREASE IS THE #1 CHALLENGE

- **A large majority of Australian fleet managers (9 out of 10) are confident** about the size of their fleet, which should remain stable or even increase – stable and in line with the global picture. Same picture for passenger cars and for LCVs.
- **Vehicles possession length is stable** (5,8 years) and in line with the global average. It is somehow shorter among the >250-employee companies (5,3 years), and for passenger cars (5,6 vs 6,0 years for LCVs).
- Fleets growth expectations are mainly **driven by business development outlooks**. Offering vehicles to employees with no company car eligibility has reinforced but its still distanced, like HR related needs (talent recruitment, employee retainment).
- **Second-hand vehicles are used by no more than 1 out of 4 companies** – pool cars and too cars mainly – quite below the global average. The picture is rather the same for passenger cars and for LCVS here too.
- Since the start of the Covid crisis, **4 out of 10 companies have introduced or increased homeworking**. Nevertheless, development of homeworking has **little impact on fleet management**, only 1 out of 10 companies having changed or considering changing their policy – through the introduction of car sharing or through a change in mileage or models mainly.
- **The #1 challenge fleet managers must face is mitigating the increase of total cost of ownership of the vehicles**. Adapting to the expansion of low emission zones in urban areas and mitigating the increase of total cost of ownership of the vehicles are also at stake, but to a lower extent.
- Lastly, **one third of the Australian companies have only one fleet manager**. Outsourcing of fleet management related services is low.

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INSIGHT 2: GROWTH POTENTIAL FOR OPERATING LEASING AND UPSELL OPPORTUNITIES ARE STILL LIMITED

#2

OUTRIGHT PURCHASE, THE MOST FAVORED FINANCING METHOD BY FAR

- **The main financing method used by Australian companies is still outright purchase**, far ahead of financial leasing and operating leasing. This picture is quite similar whatever the company size or type of vehicles considered.
- There is **little growth potential for operating leasing**. It is stable and remains limited, especially when compared to the global potential.
- **8 out of 10 companies are not interested in any additional fleet management services** (whether fuel management, online reporting, midterm rental or anything else) or in external supplier advices or in consulting expertise on how to optimize costs and processes.

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INSIGHT 3: A STILL EMERGING MARKET FOR ALTERNATIVE FUEL TECHNOLOGIES

#3

HEV IS THE ALTERNATIVE FAVORED THE MOST

- **Car policies have been expanded by 1 out of 5 companies for electric vehicles** in terms of brand selection.
- The **alternative fuel technologies adoption is lower in Australia than globally**: half of Australian companies consider or have already implemented at least one alternative fuel technology for passenger cars (vs. 7 out of 10 globally), and less than half have already implemented.
- The results per technologies show that the Australian companies are **in line with the global trend in terms of HEV implementation/consideration for passenger cars but are far behind the other countries regarding PHEV and 100% BEV**.
- **Implementation of alternative fuel technologies for LCVs is also below the global trend**. Only a very few have adopted 100% BEV and Fuel Cell is non-existent to date.
- Overall, **a very large share of corporate vehicles will still be ICE motorized** in the next 3 years.
- The **first reason to implement or consider alternative technologies, whatever the vehicles types, is the lower environmental impact**, followed by the fuel expenses reduction. These are also the drivers to start ordering more 100% BEVs.
- **1 out of 10 companies is eligible to an ESG regulatory public reporting**, 4 more will be in the next 2 years. In this perspective, employee mobility is of high importance for 4 out of 10 companies among them.
- **Charging difficulties (7 out of 10 have no charging points at their premises) and higher purchase price remain the strongest barriers to the adoption of 100% BEV**. To support the adoption of 100% BEV, Australian companies' strategy is focused on equipping their premises with charging points, rather than on subsiding the cost of home installation for drivers.

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INSIGHT 4: A STILL LIMITED ADOPTION OF MOBILITY SOLUTIONS

#4

CORPORATE VEHICLES ARE STILL ESSENTIAL BUSINESS TRANSPORT TOOLS

- The **adoption of mobility solutions in Australia remains below the global average**, in a context where private cars are the mean of commuting the most common for 7 out of 10 companies. Half of the companies have adopted at least one mobility solution (3 out of 4 globally).
- **Private lease / salary sacrifice comes #1**, followed by car/cash allowance. Private lease / salary sacrifice is also the solution with the highest growth potential in the next 3 years, far above car/cash allowance and mobility budget.
- **The main drivers for considering or implementing mobility solutions are HR related needs** (talent recruitment, employees retainment), improving companies' attractiveness and tax incentives. Mobility solutions remain perceived as add-ons to corporate vehicles mainly anyhow, **essential business transport tools for most companies**.
- At last, **1 out of 2 companies has a policy in place for cars that are owned by employees but used on business**.

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INSIGHT 5: CONNECTED VEHICLES & TELEMATICS USAGE IN LINE WITH GLOBAL TREND

#5

TELEMATICS DATA USAGE SHOULD GROW IN THE NEAR FUTURE

- In line with the global picture, **4 out of 10 Australian companies use connected vehicles** within their fleet, with no differences between passenger cars and LCVs.
- Among them, **6 out of 10 companies are already using or consider using the data coming from the vehicle box thanks to a telematics platform** in the next 3 years but only a few are currently using the data – in line with the global picture.

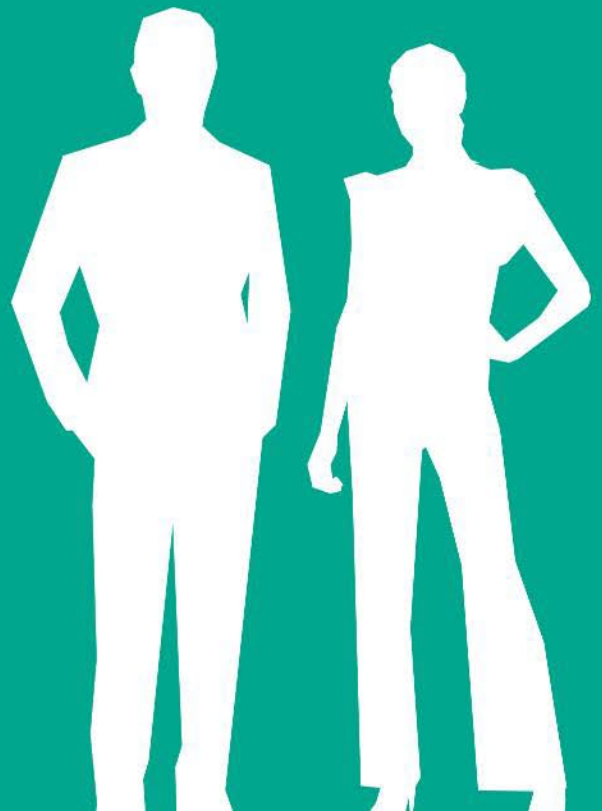
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3

WHAT ARE THE MAIN **CHARACTERISTICS OF THE FLEETS?**





AUSTRALIAN COMPANIES ARE OPTIMISTIC FOR THE FUTURE OF THEIR FLEET

1

In Australia, **9 out of 10 companies are confident about the size of their fleet**, which should remain stable or even increase (23%) – stable and in line with the global picture. Same picture for passenger cars and for LCVs.

Vehicles possession length is stable (5,8 years) and in line with the global average (5,5 years). It is somehow shorter among the >250 employees companies (5,3 years), and also for passenger cars (5,6 vs 6,0 years for LCVs).

2

Business development is the main driver of fleets growth expectations by far (75%). Offering vehicles to employees with no company car eligibility has reinforced but its still distanced (43%, +17 pts), like HR related needs (talent recruitment, employees retainment).

Only 1 out of 4 companies use second-hand vehicles – pool cars and too cars mainly – quite below the 43% global average. The picture is rather the same for passenger cars and for LCVS here too.

3

4 out of 10 companies have introduced or increased homeworking since the start of the Covid crisis. Though, **development of homeworking has little impact on fleet management**, only 1 out of 10 companies having changed or considering changing their policy – through the introduction of car sharing or through a change in mileage or models mainly.

4

Mitigating the increase of total cost of ownership of the vehicles is the #1 challenge fleet managers have to face. Adapting to the expansion of low emission zones in urban areas and mitigating the increase of total cost of ownership of the vehicles are also at stake, but to a lower extent.

Lastly, **one third of the Australian companies have only one fleet manager**. Outsourcing of fleet management related services is low (15%).

FLEET PROFILE



MOBILITY POLICY ADAPTATION COINCIDING WITH HOMEWORKING



13% 6

16%

changed the policy or consider changing

FLEET POSSESSION LENGTH



5.8 years

5.5 5.6 years







ANTICIPATED FLEET EVOLUTION

(% will increase or remain stable)

90%

91%

RESPONDENTS POSITION WITHIN THE COMPANY

In %

Passenger cars + LCVs





CEO / Managing director	30	27
Fleet director / manager	21	18
Procurement director / manager	11	12
Finance director / officer / manager / CFO	8	11
HR director/ manager	3	9
COO (Chief Operations Officer)	11	8
CSR director / officer / manager	4	6
Facility manager	10	5
Mobility manager	1	3
Other, please specify	2	2

Could you please specify your exact position in the company?
Basis: companies with corporate vehicles = 100%

NUMBER OF VEHICLES IN FLEET

In %

Passenger cars + LCVs



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 %

		TOTAL				
PASSENGER CARS		99	100	96	100	100
		98	97	98	100	100
VANS OR LCVs		100	99	100	100	100
		99	98	97	99	99

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%

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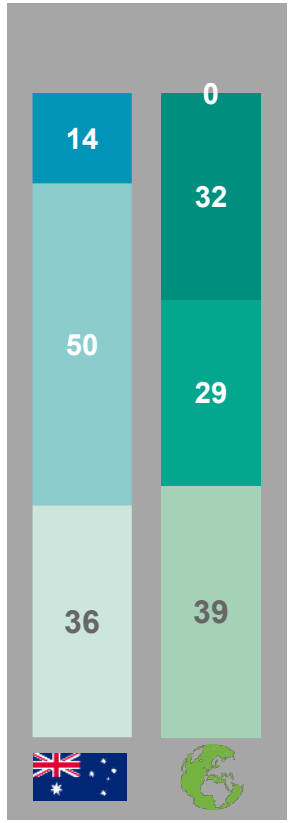
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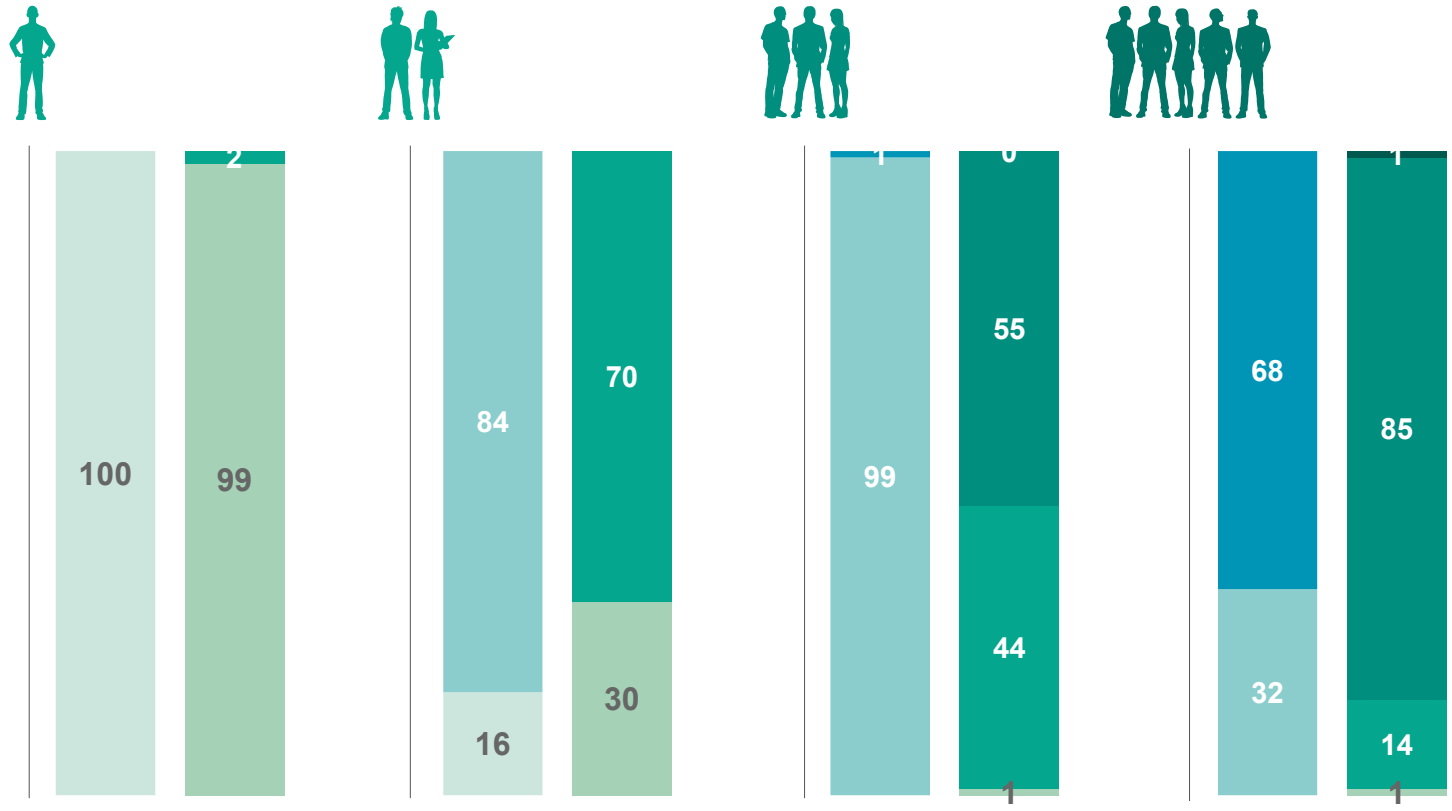
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NUMBER OF PASSENGER CARS IN FLEET

In %

Passenger cars





1000 vehicles and more

100 to 999 vehicles

10 to 99 vehicles

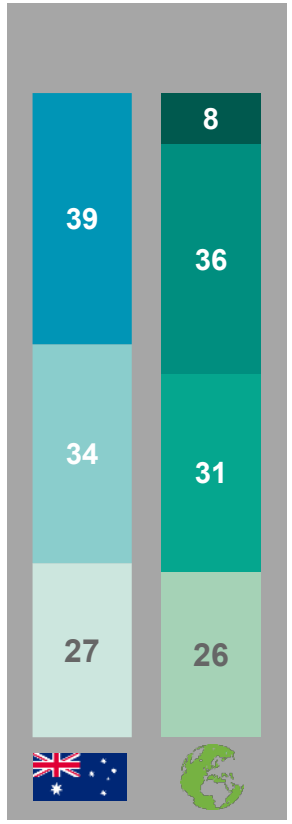
1 to 9 vehicles

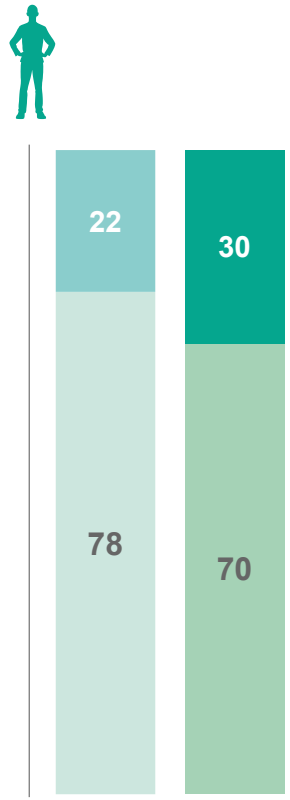
And can you please tell us the total number of cars in your fleet?
Basis: companies with passenger cars

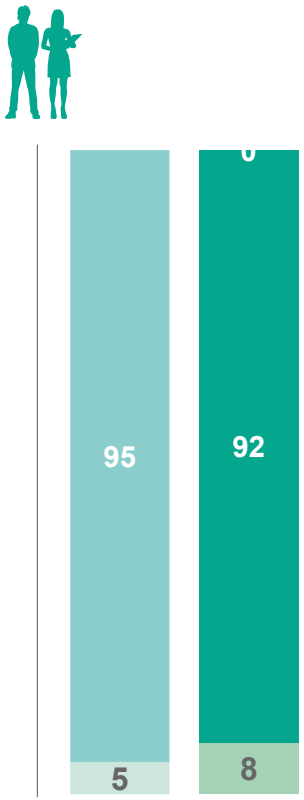
NUMBER OF LCVS IN FLEET

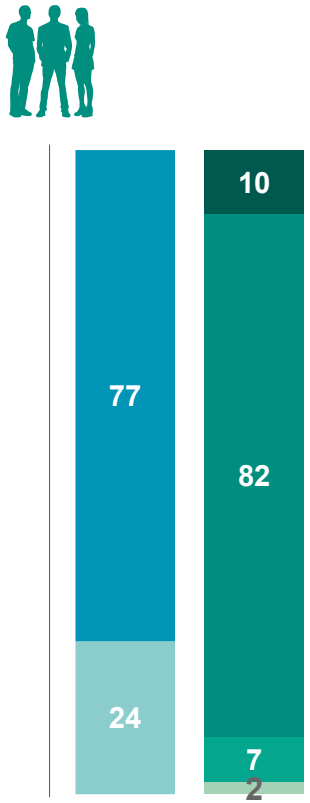
In %

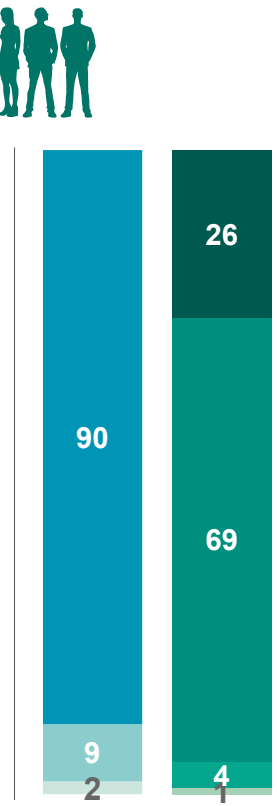
LCVs











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



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



Passenger cars

AVERAGE IN YEARS

	TOTAL				
	5.6	5.7	5.7	5.8	5.1
	5.4 (5.7)	5.3 (5.6)	5.4 (5.8)	5.3 (5.7)	5.5

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

	TOTAL	1	2	3	4
	6	6.1	5.9	6.2	5.4
	5.7 (5.9)	5.7 (5.9)	5.8	5.7 (5.9)	5.8

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

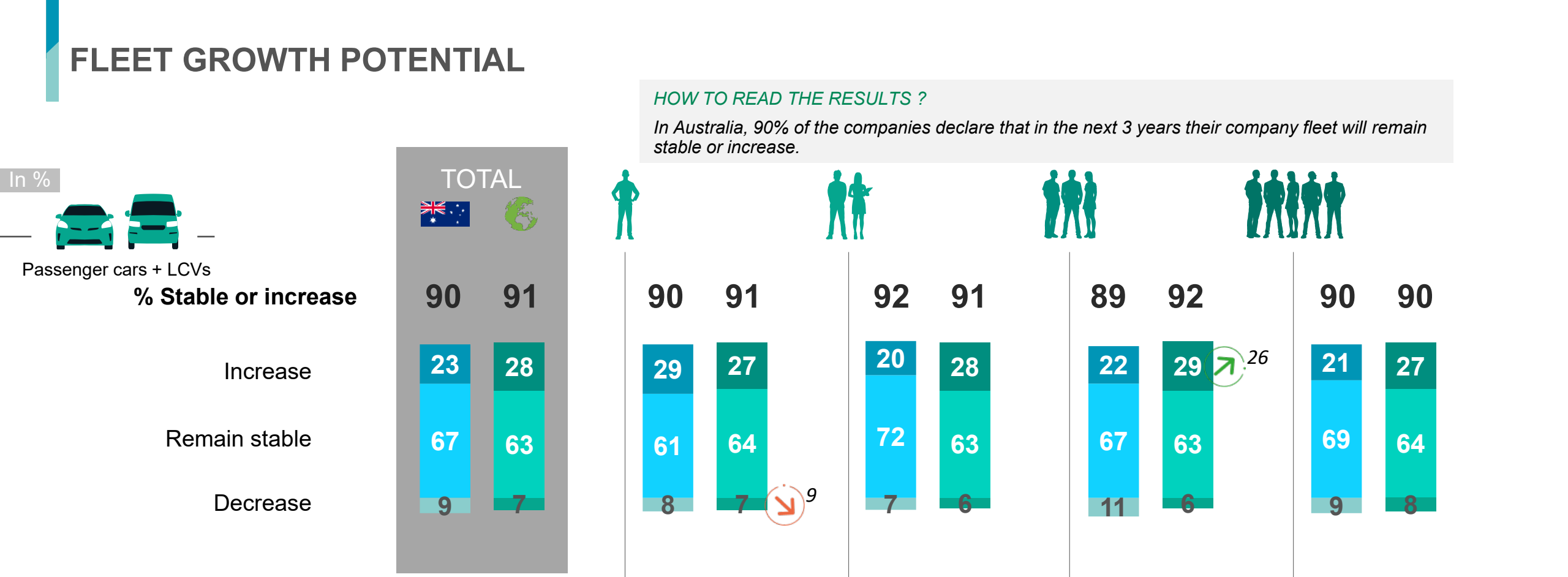
FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Australia, 90% of the companies declare that in the next 3 years their company fleet will remain stable or increase.

In %

Passenger cars + LCVs



BALANCE in pts (INCREASE ⊖ DECREASE)

2024	+15	+21	+21	+20	+13	+21	+11	+23	+12	+19
2023	+11	+20	+11	+19	+15	+22	+12	+19	+5	+21
2022	-	+20	-	+21	-	+21	-	+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%

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FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Australia, 90% of the companies declare that in the next 3 years their company fleet will remain stable or increase.

In %

Passenger cars + LCVs



	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	91	91	6	7
% Stable or increase	92	92	89	92	92	93	93	93	93	91	92	88	86	92	90	88	86	94	93	96	91	94	87	78	95	93	92	91	90	95				
Increase	21	21	20	25	30	42	18	16	38	23	21	27	22	29	19	27	19	27	20	19	50	40	28	28	54	35	33	36	23	18				
Remain stable	70	72	69	67	62	51	75	78	56	68	71	61	64	63	71	61	67	67	73	77	41	55	59	50	41	58	59	55	67	77				
Decrease	5	5	10	5	7	5	5	6	5	8	4	5	12	6	8	8	12	4	6	2	6	4	8	20	2	7	8	8	9	4				
2024	+17	+15	+10	+20	+22	+37	+13	+10	+33	+15	+17	+22	+10	+23	+11	+20	+7	+24	+14	+16	+44	+36	+21	+9	+52	+28	+25	+28	+15	+13	+21	+18		
2023	+17	+11	+13	+14	+21	+34	+19	+9	+24	+14	+15	+15	+9	+24	+7	+22	+8	+22	+12	+12	+46	+34	+21	+26	+44	+23	+24	+30	+11	+16	+20	+16		
2022	+18	+13	+18	+16	+24	+24	+18	+22	+27	+13	+19	+23	+7	+22	+13	+23	+10	+21	+11	+14	+33	+14	+19	+24	+49	-	-	-	-	-	+20	+18		

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%

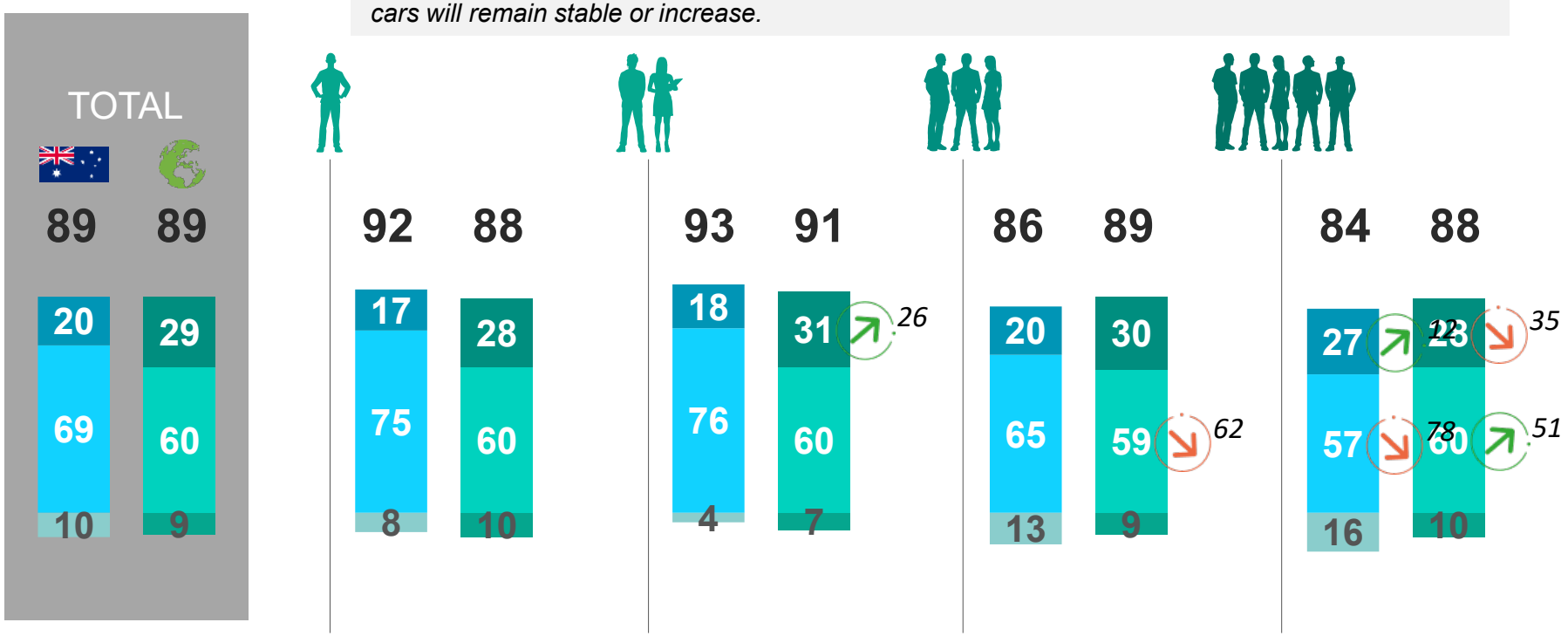
PASSENGER CAR FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Australia, 89% of the companies declare that in the next 3 years the total number of passenger cars will remain stable or increase.

In %

Passenger cars



BALANCE in pts (INCREASE ⊖ DECREASE)

2024	+10	+20	+9	+19	+14	+24	+8	+21	+11	+18
2023	+11	+20	+10	+19	+19	+18	+12	+19	+3	+24

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

Basis: companies with passenger cars

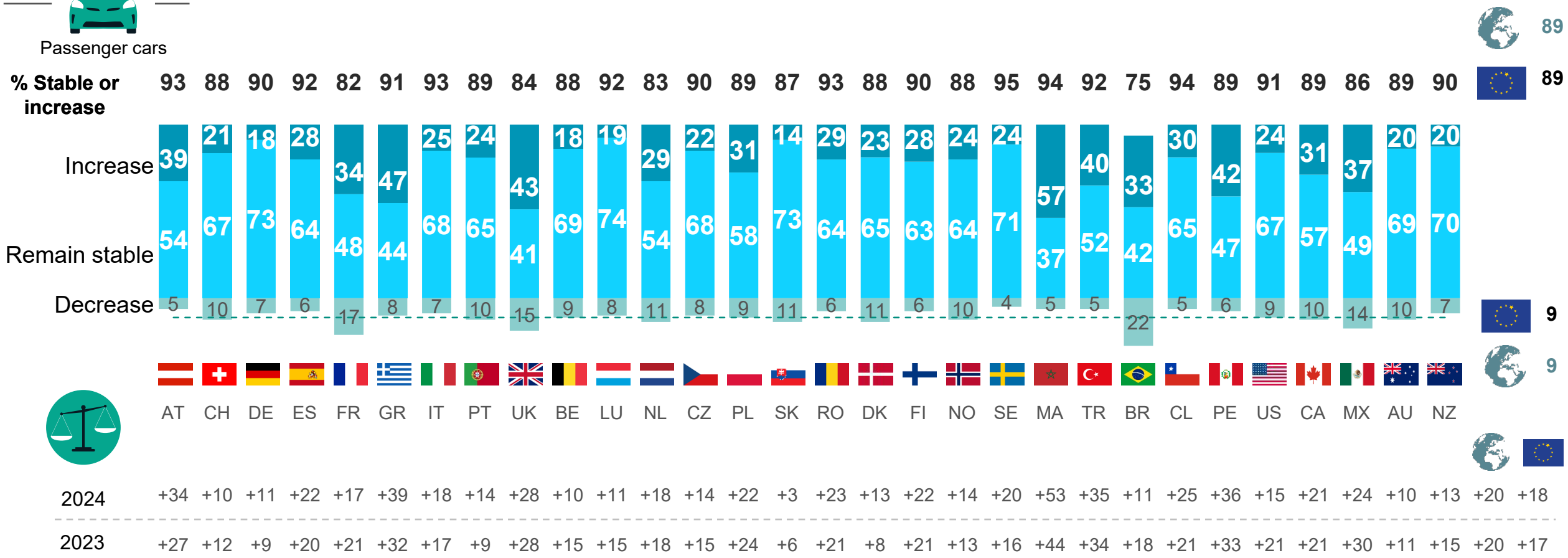
PASSENGER CAR FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Australia, 89% of the companies declare that in the next 3 years their company fleet of passenger cars will remain stable or increase.

In %

Passenger cars



	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		
2024	+34	+10	+11	+22	+17	+39	+18	+14	+28	+10	+11	+18	+14	+22	+3	+23	+13	+22	+14	+20	+53	+35	+11	+25	+36	+15	+21	+24	+10	+13	+20	+18
2023	+27	+12	+9	+20	+21	+32	+17	+9	+28	+15	+15	+18	+15	+24	+6	+21	+8	+21	+13	+16	+44	+34	+18	+21	+33	+21	+21	+30	+11	+15	+20	+17

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

Basis: companies with passenger cars

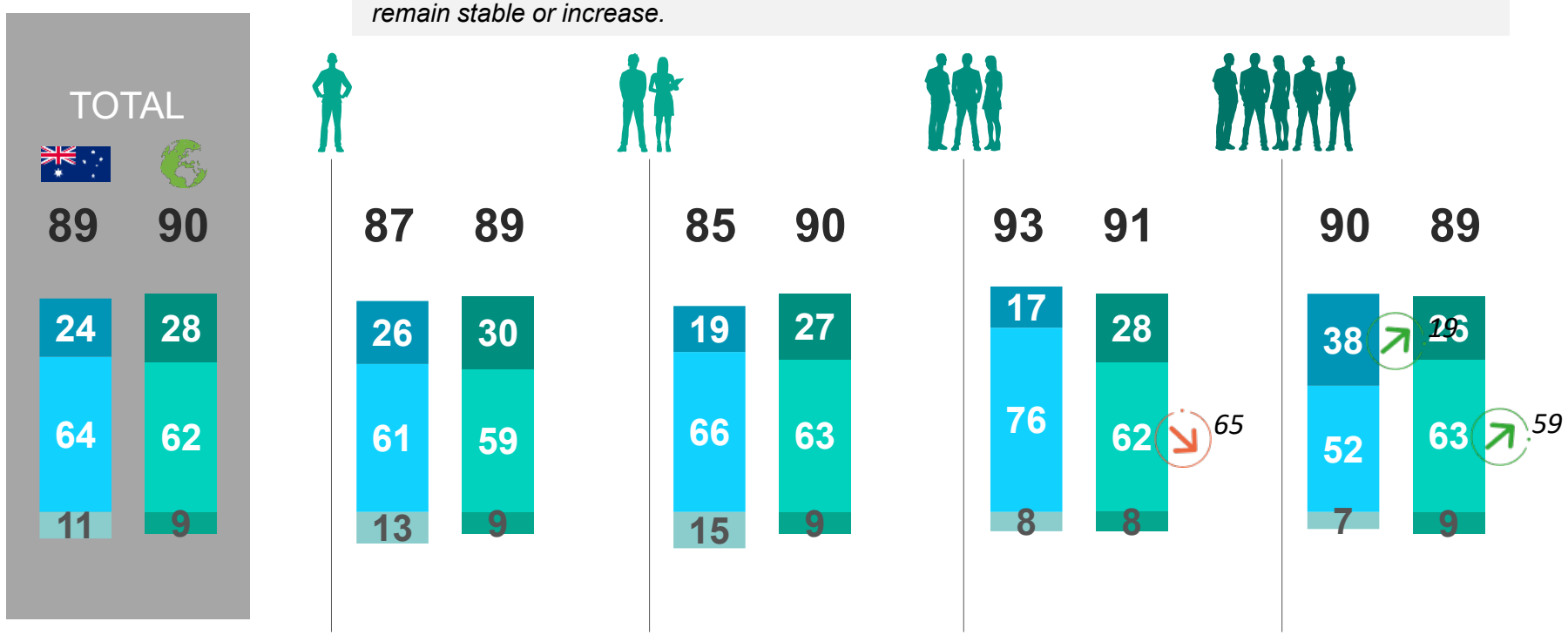
LCVS FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Australia, 89% of the companies declare that in the next 3 years the total number of LCVs will remain stable or increase.

In %

LCVs



BALANCE in pts (INCREASE ⊖ DECREASE)

2024	+14	+19	+13	+20	+4	+18	+9	+20	+31	+17
2023	+9	+19	+3	+21	+16	+18	+12	+19	+8	+20

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

Basis: companies with LCVS

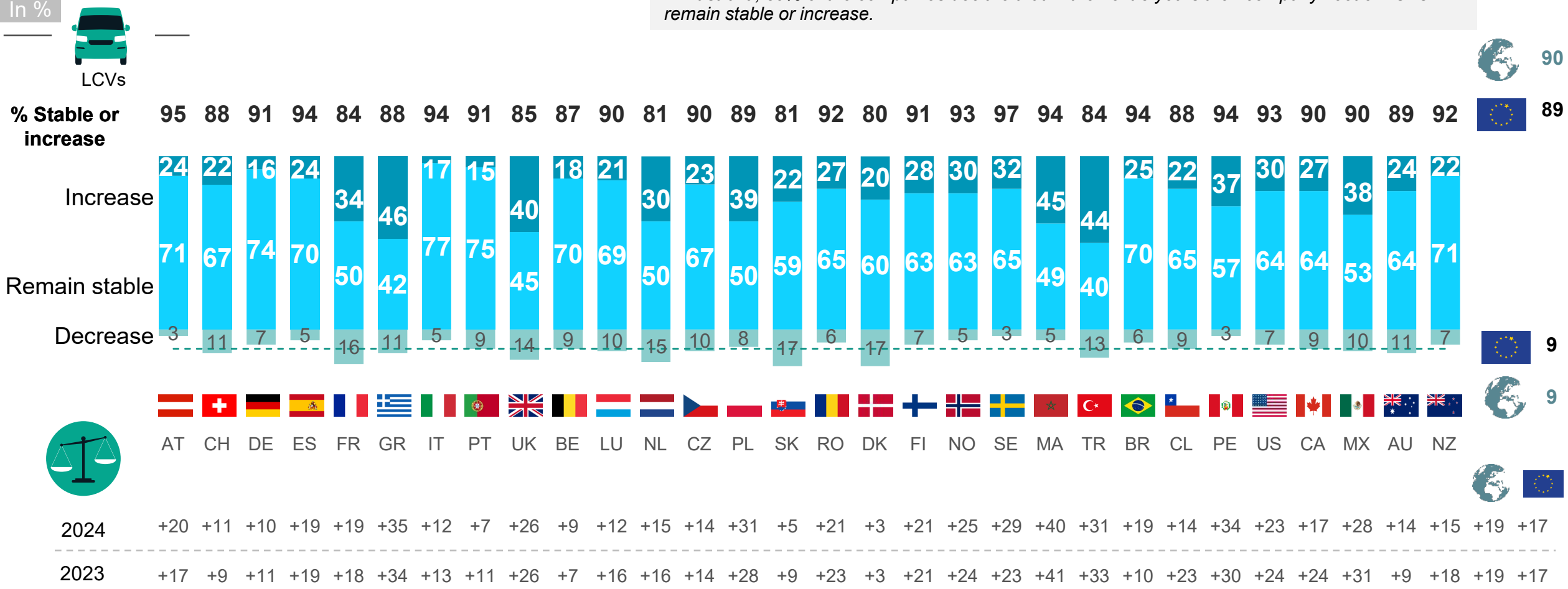
LCVS FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Australia, 89% of the companies declare that in the next 3 years their company fleet of LCVs will remain stable or increase.

In %

LCVs



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

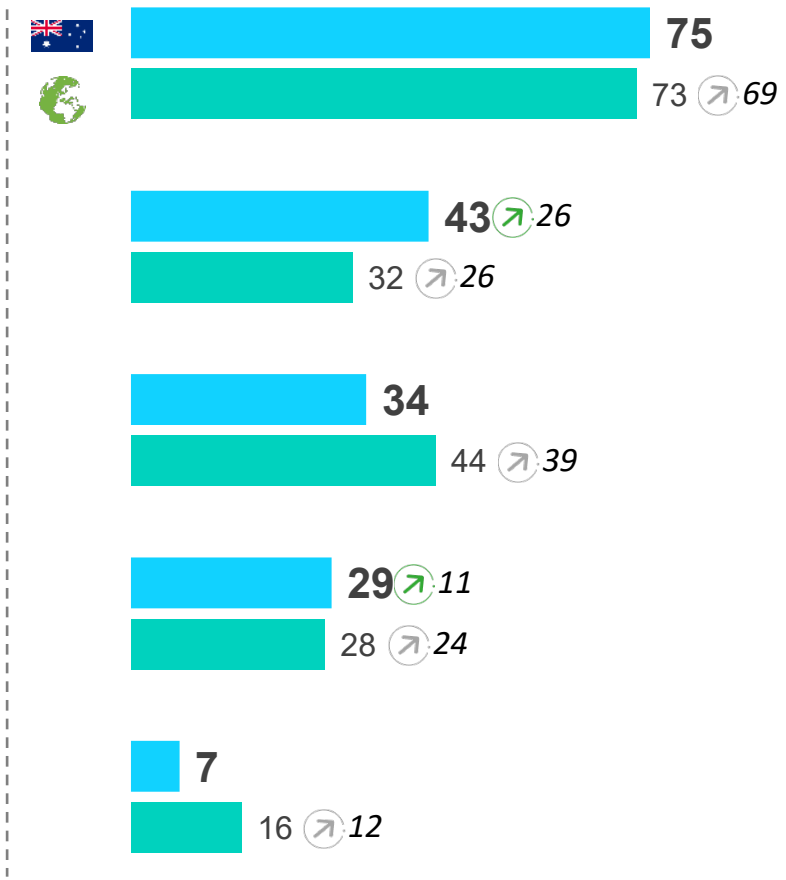
Basis: companies with LCVS

REASON FOR FUTURE FLEET INCREASE

In %

Passenger cars + LCVs





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

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XX Significantly higher than 2023 year
XX = score 2023

XX Significantly lower than 2023 year
XX = score 2023

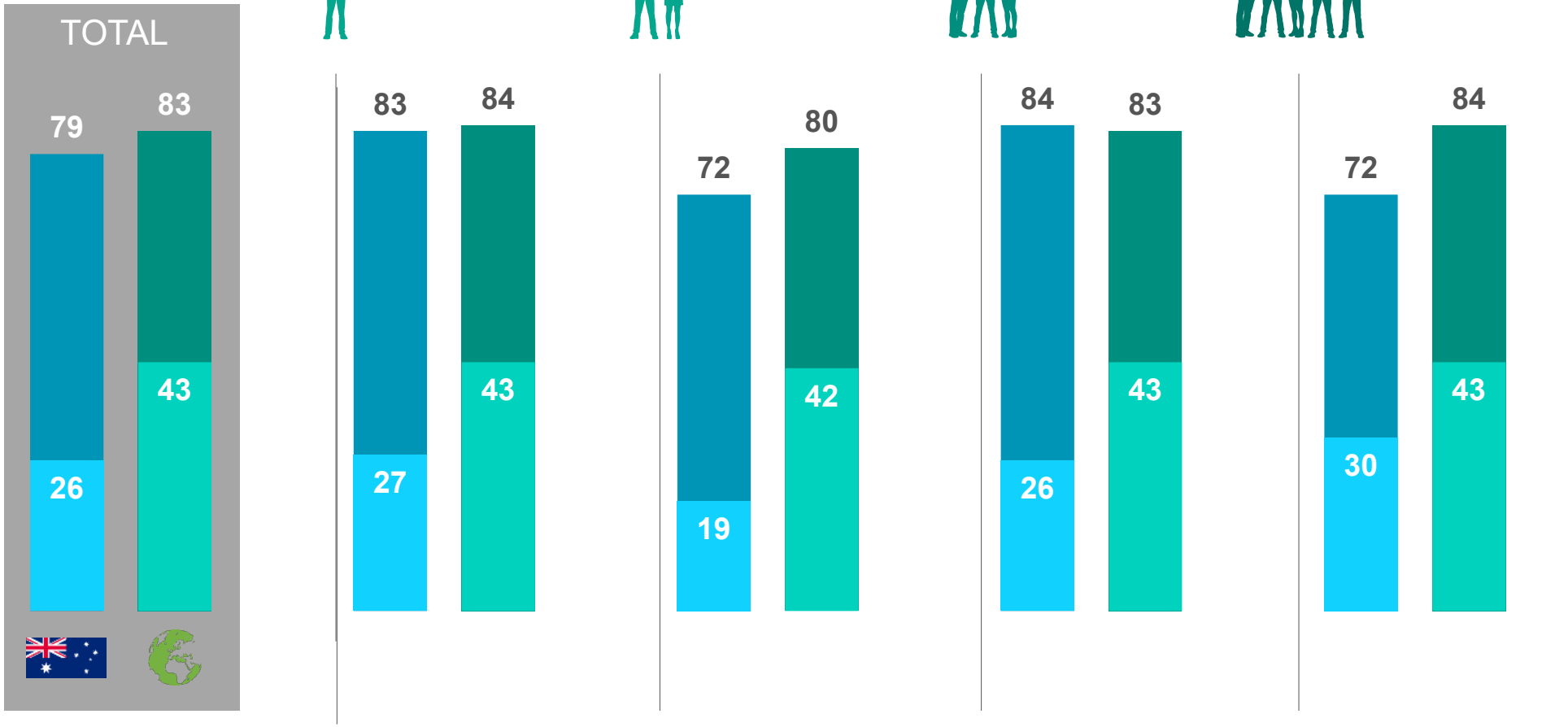
SECOND-HAND VEHICULES

HOW TO READ THE RESULTS ?

In Australia, 79% of the companies are already using or consider to use second-hand vehicles in the next 3 years. 26% of the companies are currently using some.

In %

Passenger cars + LCVs



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%

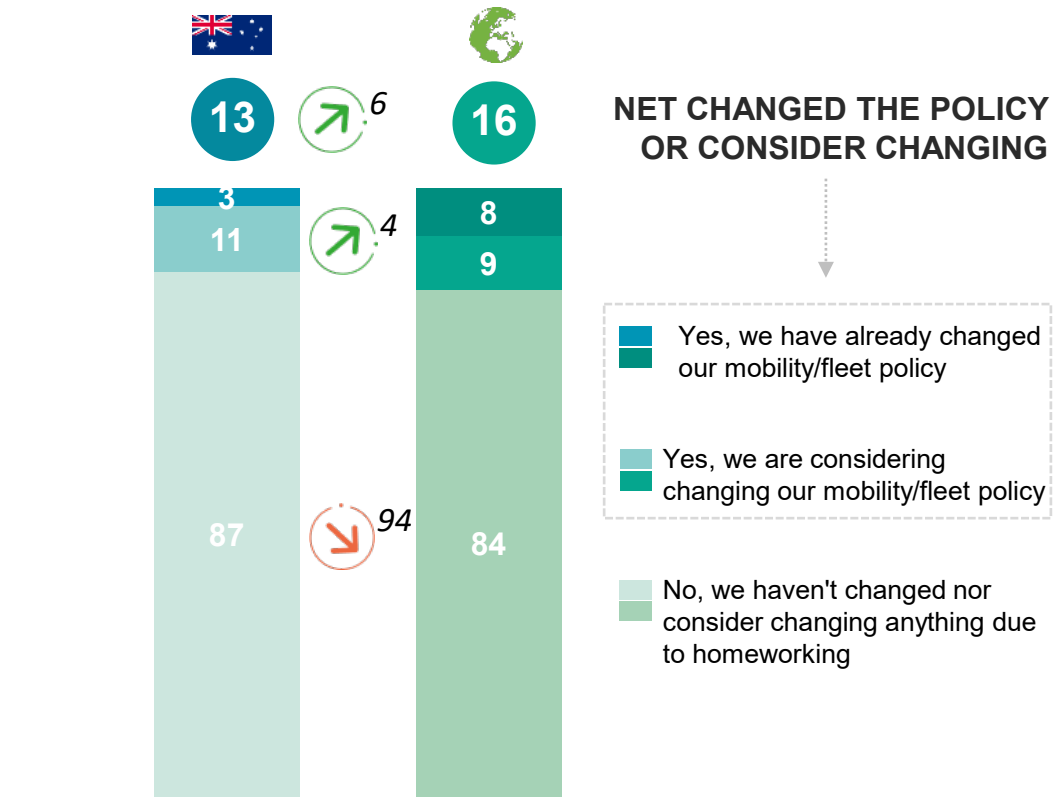
MOBILITY POLICY ADAPTATION COINCIDING WITH HOMEWORKING

HOW TO READ THE RESULTS ?

In Australia, among the companies that changed or consider changing their mobility policy, 12% have already reduced the total number of the vehicles in the company's fleet.

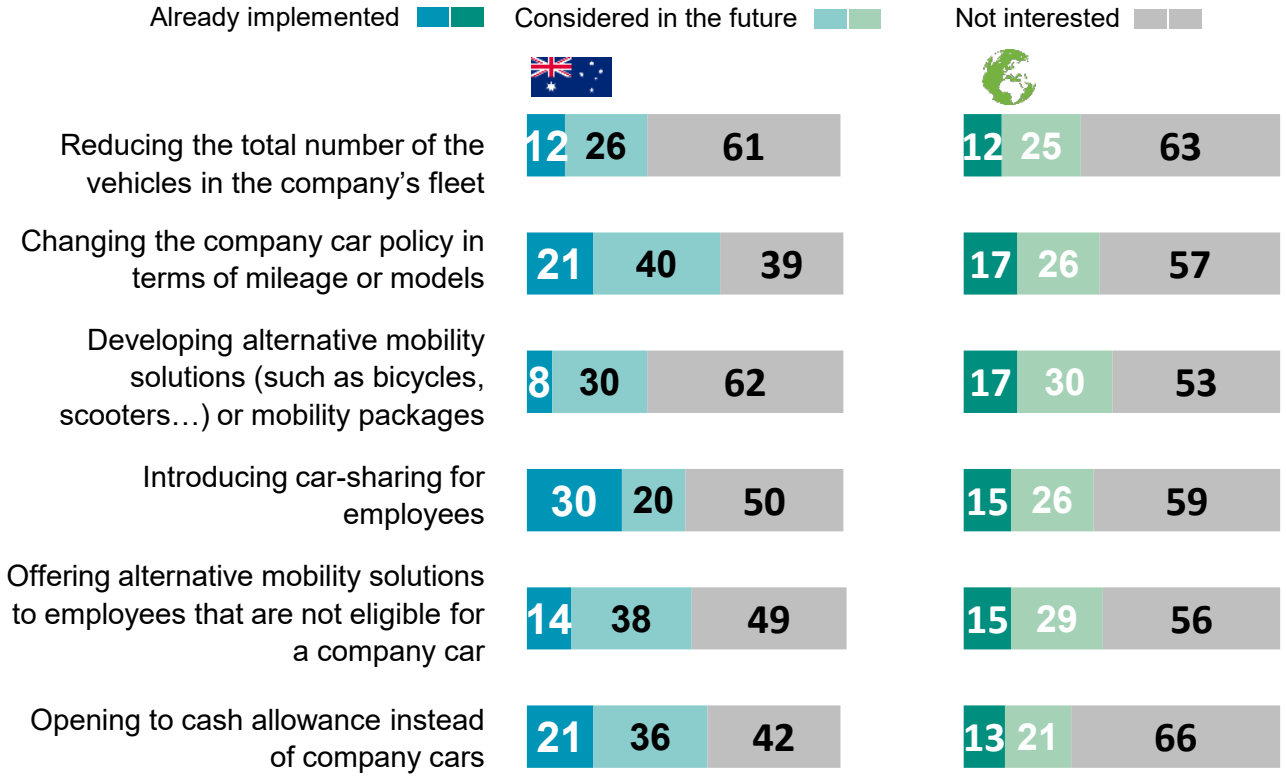
In %

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

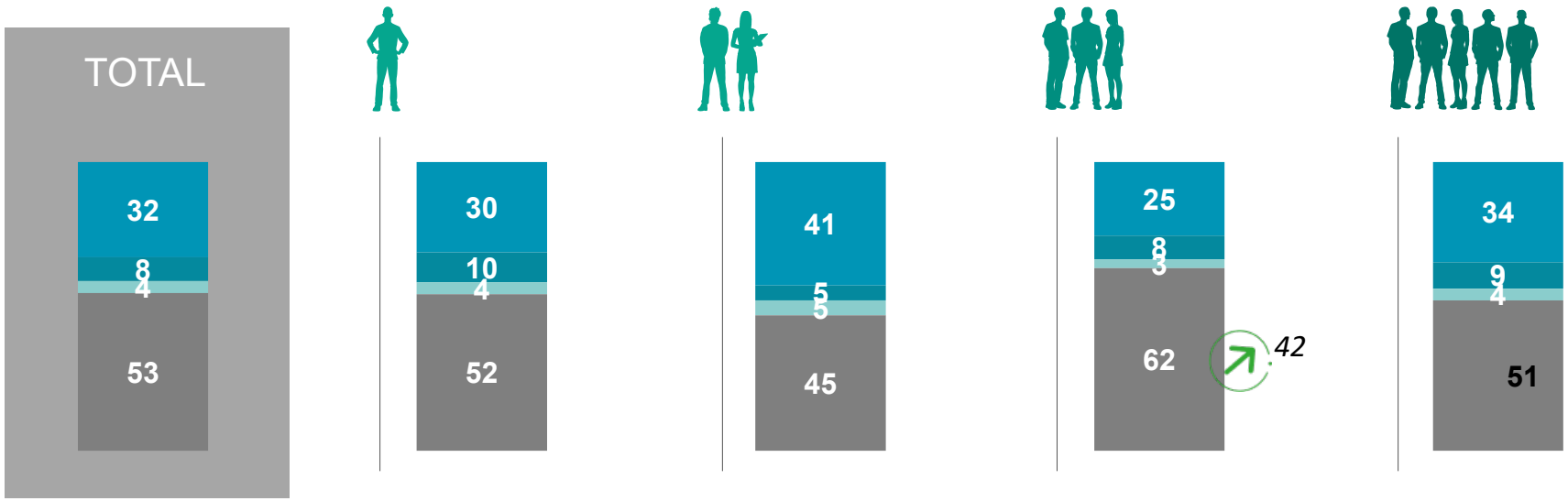
With regards to the development of homeworking, have you changed, or do you consider changing your mobility/fleet policy?
And among the following changes, can you please select those you have implemented or consider implementing with regards to the development of homeworking?

Question asked to respondents that are aware of mobility solutions

HOMEWORKING EVOLUTION SINCE COVID CRISIS

In %

Passenger cars + LCVs



Have introduced
Have increased
Kept the same level
Don't allow

Expected decrease of kms for the car drivers

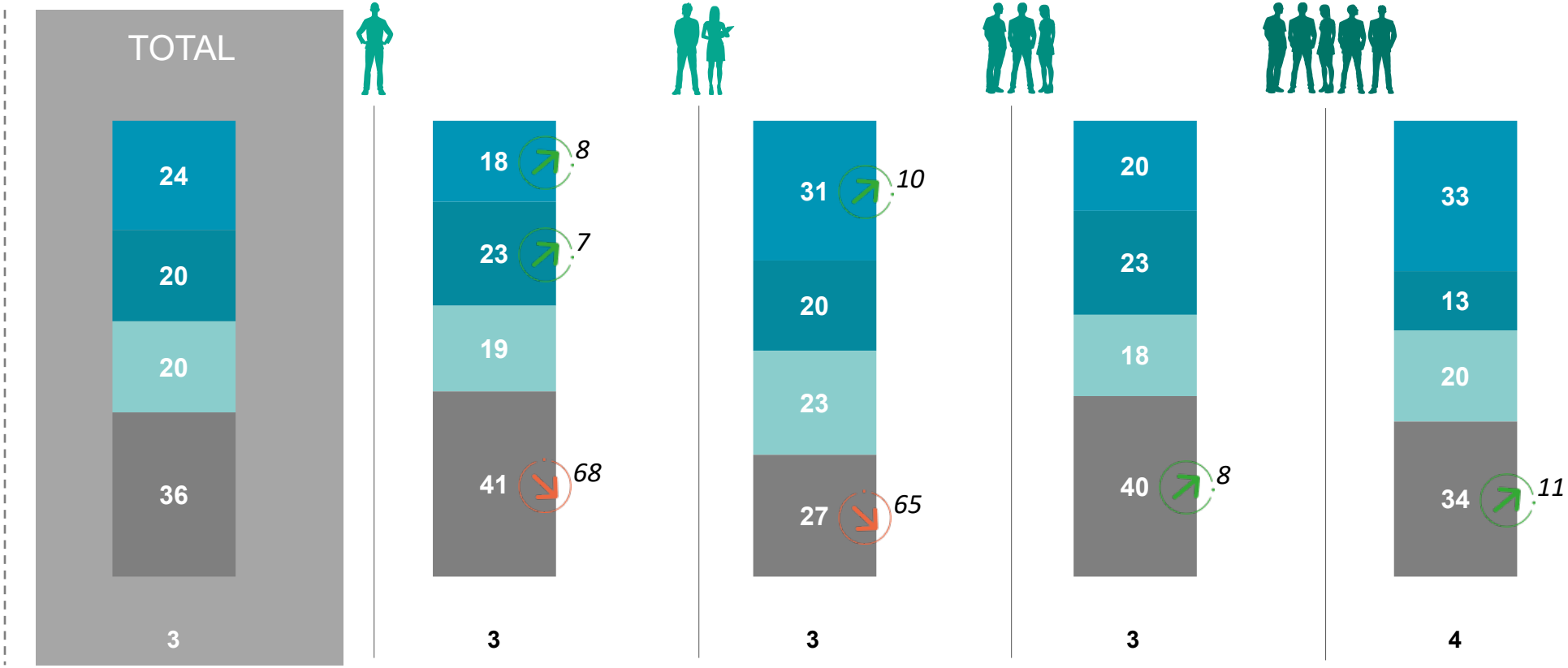
11% 12% 11% 11% 7%

Have you introduced or increased homeworking for your employees since the beginning of the Covid crisis?
Basis: companies with corporate vehicles = 100%
What would be the expected decrease in mileage for your company car drivers (in %) due to homeworking
Basis: companies which have introduced or increased or kept the same level of homeworking ?

NUMBER OF FLEET MANAGERS IN THE COMPANY

In %

Passenger cars + LCVs



How many people are managing fleet vehicles in your company? We don't speak here about equivalence Full Time Employees but about number of employees.
Basis: companies with corporate vehicles = 100%

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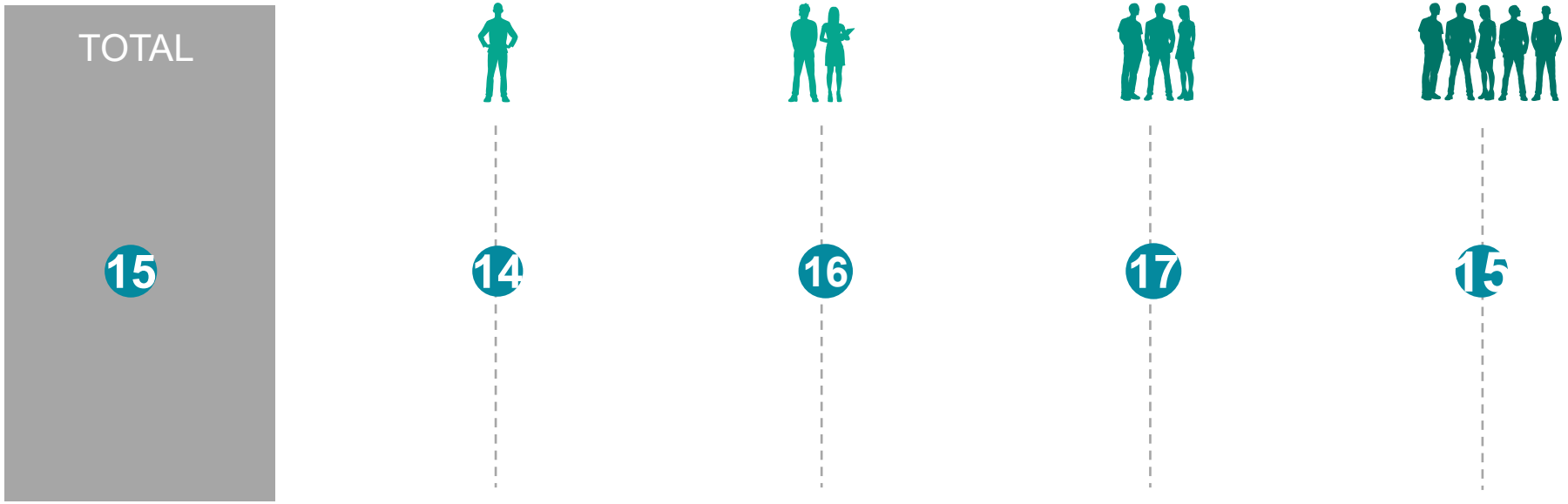
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OUTSOURCE OF SERVICES IN TERMS OF FLEET MANAGEMENT

In %

Passenger cars + LCVs



In your company, do you currently outsource services in terms of fleet management?
Basis: companies with corporate vehicles = 100%

MOST IMPORTANT CHALLENGES EXPECTED

In %

Passenger cars + LCVs

Nb 1 challenge

Top 3 challenges





Implementing alternative fuel technologies (100% electric vehicles, hybrids, rechargeable hybrids)	8%	30%	15%	35%
Adapting to restrictive public policies on petrol and diesel vehicles	16%	36% (28)	14%	34% (27)
Mitigating the increase of total cost of ownership of the vehicles	25%	53%	13%	30% (24)
Inducing more responsible driving among employees	4%	22% (15)	12%	29% (21)
Managing longer vehicles' delivery time	6%	33% (23)	11%	26% (22)
Adjusting to new ways of working (hybrid between home and office)	9%	25%	10%	25% (20)
Adapting to the expansion of low emission zones in urban areas	20%	37% (28)	10%	24% (19)
Adapting to evolutions of car selling models (ex. directly from manufacturer without buying through car dealer)	9%	17%	9%	23% (18)
Implementing other mobility solutions (ex. car sharing, bikes…)	4%	12%	8%	20% (15)

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

4

HOW ARE COMPANIES FINANCING THEIR FLEET?





GROWTH POTENTIAL FOR OPERATING LEASING AND UPSELL OPPORTUNITIES ARE STILL LIMITED

1. **Outright purchase is still the main financing method used** by Australian companies (53%), far ahead of financial leasing (15%) and operating leasing (10%). This picture is quite similar whatever companies sizes or types of vehicles are considered.

2. **Growth potential of operating leasing is stable and remains limited** (23% having to intention to introduce or to increase its use), especially when compared to the global potential (36%).

3. **8 out of 10 companies are not interested in any additional fleet management services** (whether fuel management, online reporting, midterm rental or anything else) or in external supplier advices or in consulting expertise on how to optimize costs and processes.

FINANCING



OUTRIGHT PURCHASE

53%





CREDIT

8%





OPERATING LEASING

10%





FINANCIAL LEASING

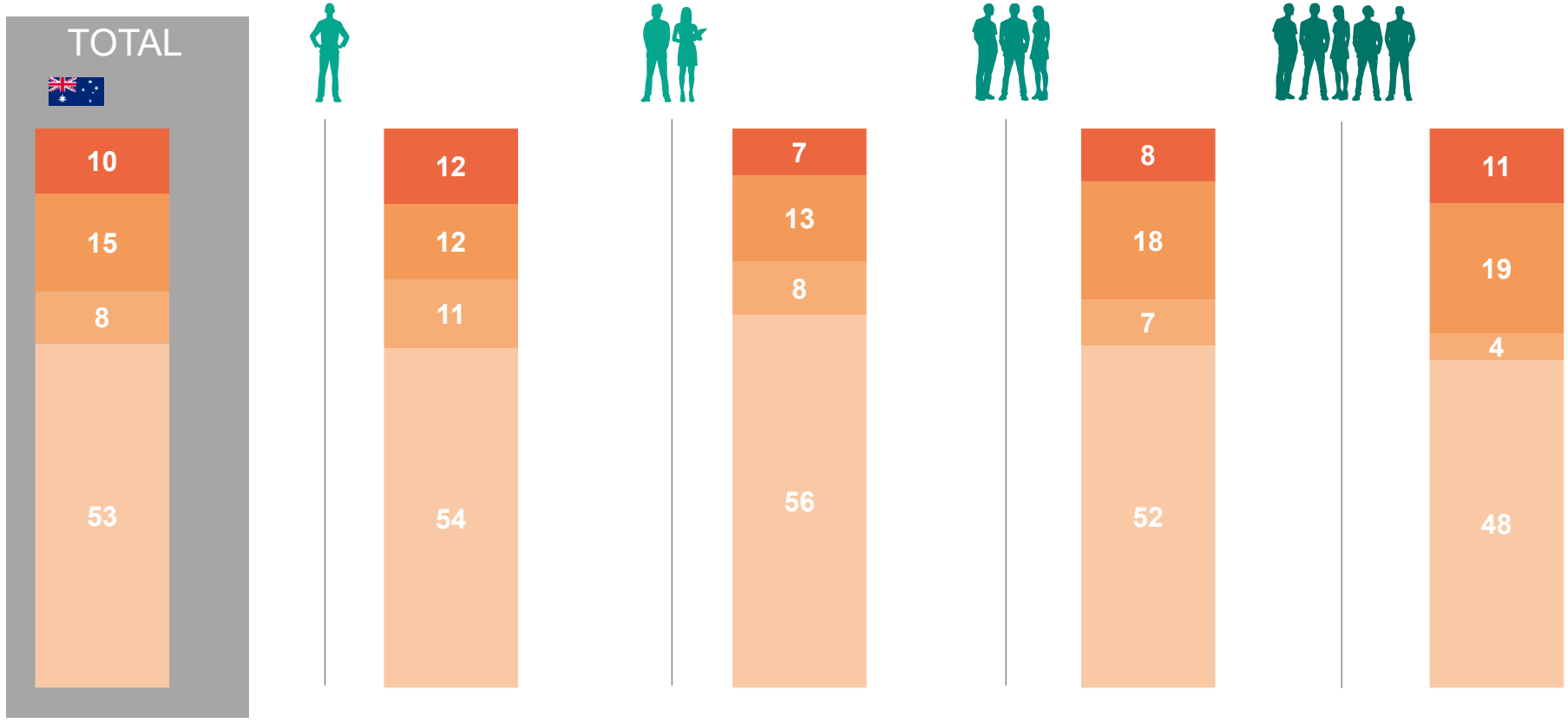
15%



MAIN FLEET FINANCING METHOD

In %

Passenger cars + LCVs



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

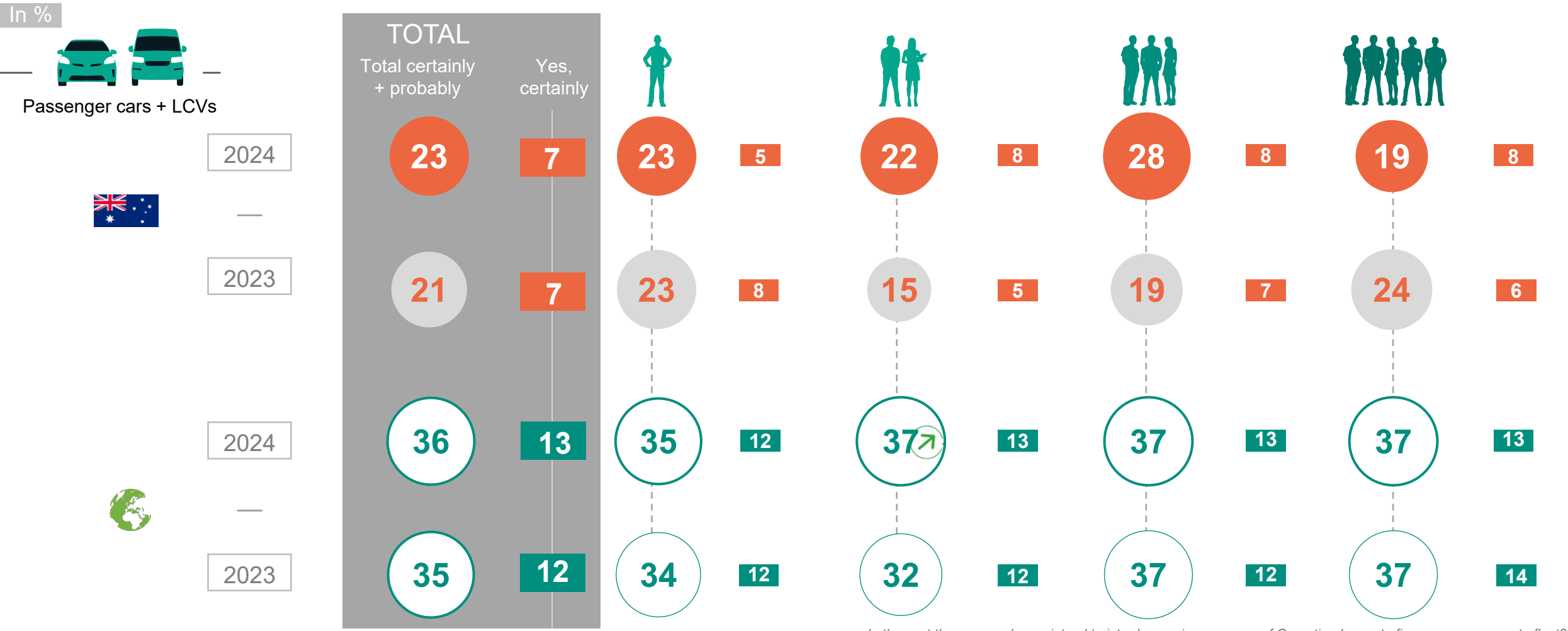


	TOTAL		1		2		3		4	
	certainly + probably	Yes, certainly	certainly + probably	Yes, certainly	certainly + probably	Yes, certainly	certainly + probably	Yes, certainly	certainly + probably	Yes, certainly
Australia	23	7	23	5	22	8	28	8	19	8
Europe	36	13	35	12	37	13	37	13	37	13

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

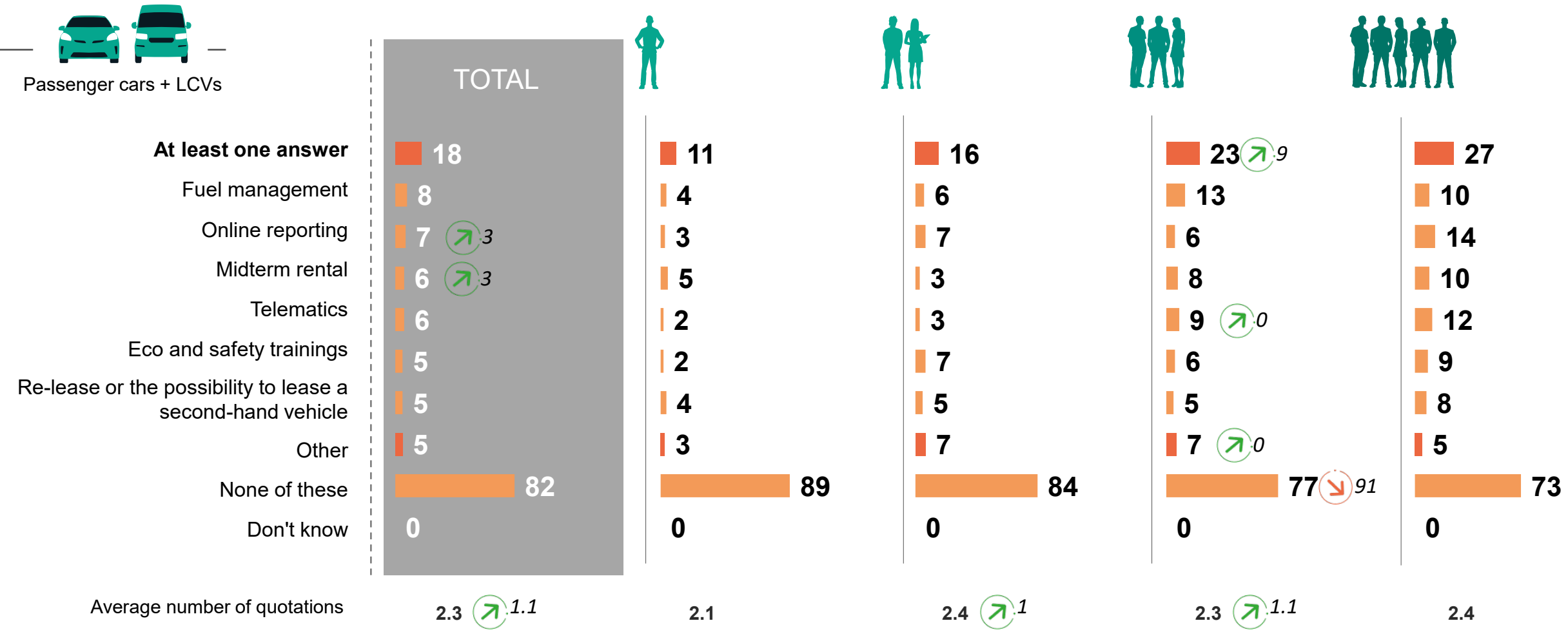


In the next three years do you intend to introduce or increase use of Operating Lease to finance your corporate fleet?
Basis: companies with corporate vehicles = 100%

ADDITIONAL FLEET MANAGEMENT SERVICES CONSIDERED

In %

Passenger cars + LCVs



Concerning your fleet management, which additional services or products would your company be interested in?
Basis: companies with corporate vehicles = 100%

EXTERNAL SUPPLIER ADVICE REQUIRED

In %

Passenger cars + LCVs

	TOTAL				
Alternative mobility solutions	13	13 ↗ 5	7	14	15
Most appropriate energies and shift to alternatives energies	12	13	9	11	17
Tax optimization	10	10	4	11	15
User's satisfaction optimization	9	2	13	12	12
Cost optimization	9	10	5	9	10
The most appropriate cars segments for your company	8	7	9	7	11
Don't know	*70*	*71*	*73*	*68*	*68*
Average number of quotations	**2.0**	**1.9**	**1.8**	**2.0**	**2.5**

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

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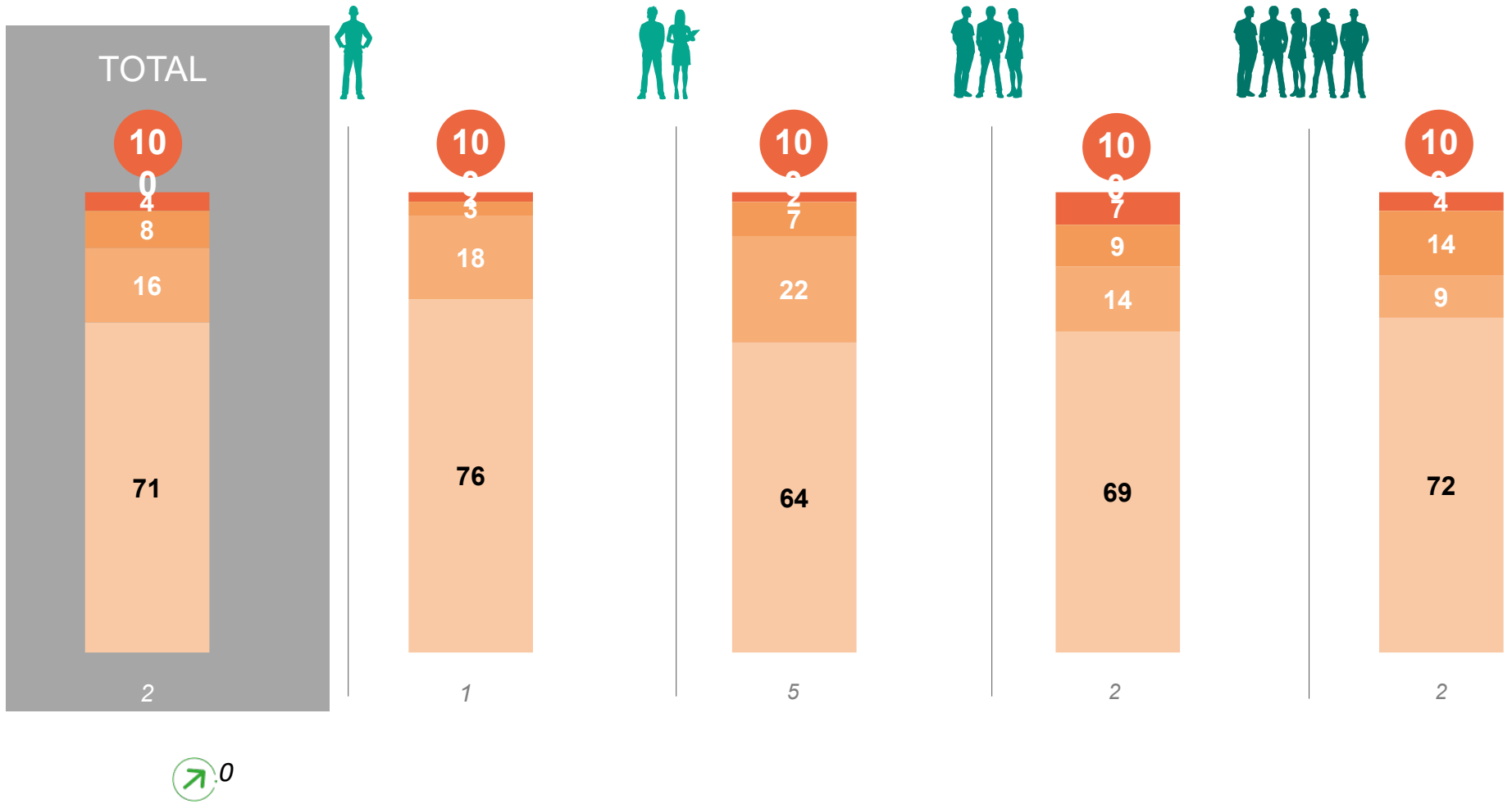
CONSULTING EXPERTISE INTEREST

In %

Passenger cars + LCVs

NET INTERESTED
(very + somewhat)

Very interested
Somewhat interested
Somewhat not interested
Not at all interested



Would you be interested to benefit from consulting expertise on how to optimize your costs and process of your fleet administration?
Basis: companies with corporate vehicles = 100%

5

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



A STILL EMERGING MARKET FOR ALTERNATIVE FUEL TECHNOLOGIES

1

1 out of 5 companies has expanded its car policy for electric vehicles in terms of brand selection.

A **lower adoption of alternative fuel technologies than globally**: 56% of Australian companies consider or have already implemented at least one alternative fuel technology for passenger cars (vs. 70% globally), and only 43% have already implemented (vs. 49%).

Looking at the details per technology, it turns out Australian companies are **in line with the global trend in terms of HEV implementation/consideration for passenger cars (34% vs 38%) but are far behind the other countries regarding PHEV (22% vs 36%) and 100% BEV (20% vs 36%).**

2

For LCVs, the implementation of alternative fuel technologies is also below the global trend (23% of use or consider, vs 31%). Only 3% have adopted 100% BEV and Fuel Cell is non-existent to date.

3

Overall, **a very large share of corporate vehicles will still be ICE motorized in the next 3 years** (89% for passenger cars, 98% for LCVs).

Whatever the vehicle's type, **the first reason to implement or consider alternative technologies is the lower environmental impact** (56% for passenger cars, 73% for LCVs), followed by the fuel expenses reduction (47%, 56%). These are also the drivers to start ordering more 100% BEVs.

4

1 out of 10 companies is eligible to an ESG regulatory public reporting, 4 more will be in the next 2 years. In this perspective, employees mobility is of high importance for 4 out of 10 companies among them.

Focusing on 100% BEV, charging difficulties (7 out of 10 have no charging points at their premises) and higher purchase price remain the strongest barriers to the adoption of this technology. To support the adoption of 100% BEV, Australian companies' strategy is focused on equipping their premises with charging points, rather than on subsiding the cost of home installation for drivers.

ENERGY MIX

AT LEAST ONE ALTERNATIVE IMPLEMENTED OR CONSIDERED*

for Passenger cars

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

56%

70%

AT LEAST ONE ALTERNATIVE IMPLEMENTED

for Passenger cars

43%

49%

EXPECTED PART OF 100% ELECTRIC PASSENGER CAR IN 3 YEARS

5% 24

17% 18

EXPECTED PART OF 100% ELECTRIC LCV IN 3 YEARS

1% 20

10% 12

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

CAR POLICY FOR ELECTRIC VEHICLES IN TERMS OF BRAND SELECTION

In %

Passenger cars + LCVs

	TOTAL				
% Increased choice of brands	22	30	18	22	15
			42		

Have you expanded your car policy for electric vehicles in terms of brand selection?

Basis: Have already implemented EV/PHEV (FOR LCV OR PASSENGER CAR) or Consider implementing EV/PHEV in their fleet (FOR LCV OR PASSENGER CAR)

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CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

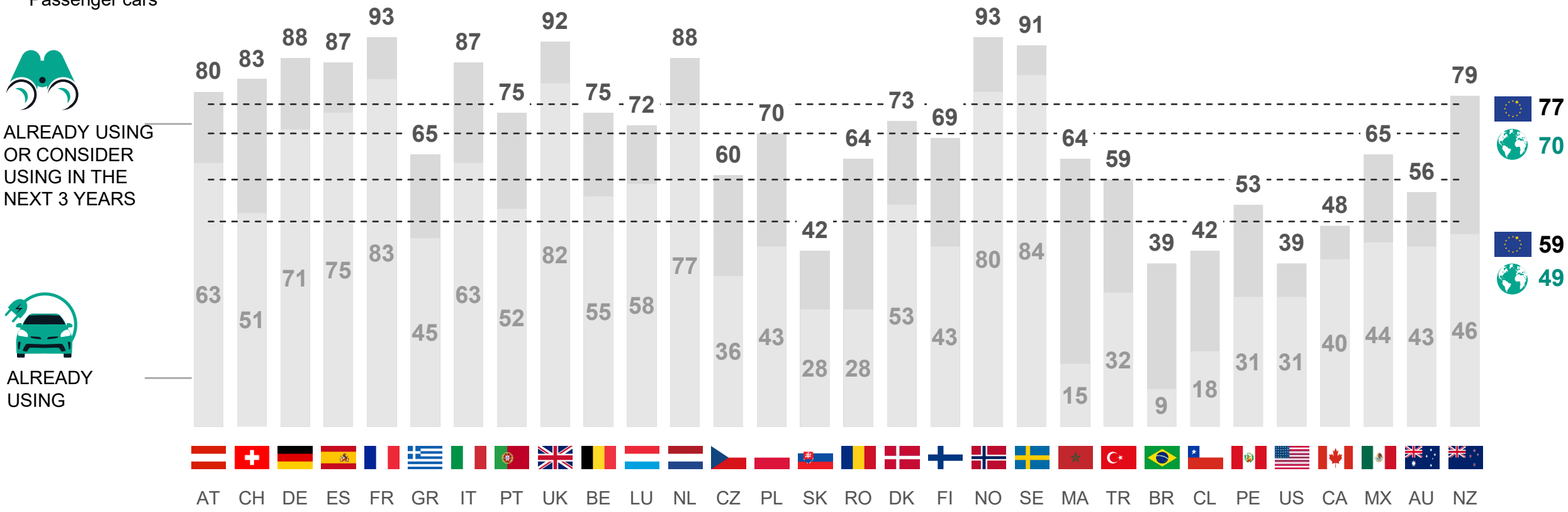
(At least one technology among HEV, PHEV and 100% BEV)

In %

Passenger cars

HOW TO READ THE RESULTS ?

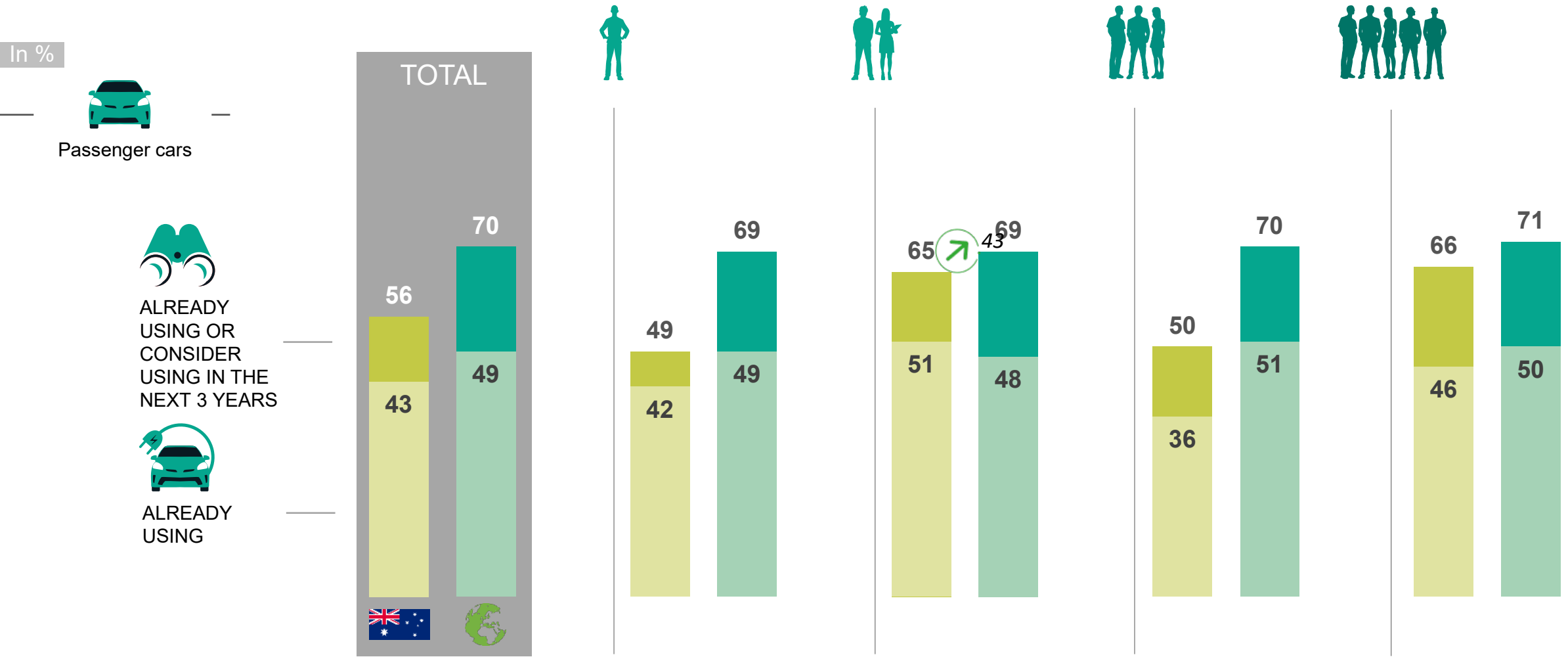
In Australia, 56% of the companies are already using or consider to implement at least one alternative technology in the next 3 years. 43% of the companies is currently using at least one.



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)



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

	Plug-in Hybrid			Hybrid			100% Battery Electric Vehicle		
	2022	2023	2024	2022	2023	2024	2022	2023	2024
ALREADY USING	0	9	13	0	31	27	0	10	12
ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS	17		22	38		34	18		20
Global	32	37	36 ▲	34	41	38 ↘ ▲	29	34	36 ▲
Already using	20	23	23 ▲	22	26	24 ↘ ▲	16	19	20 ▲

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

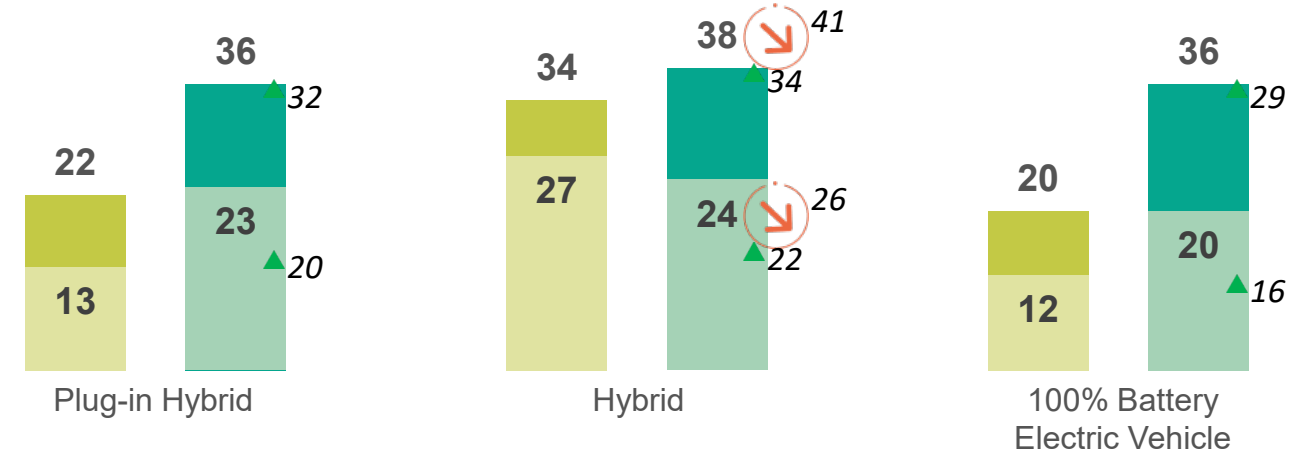
Passenger car fleet

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

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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 %

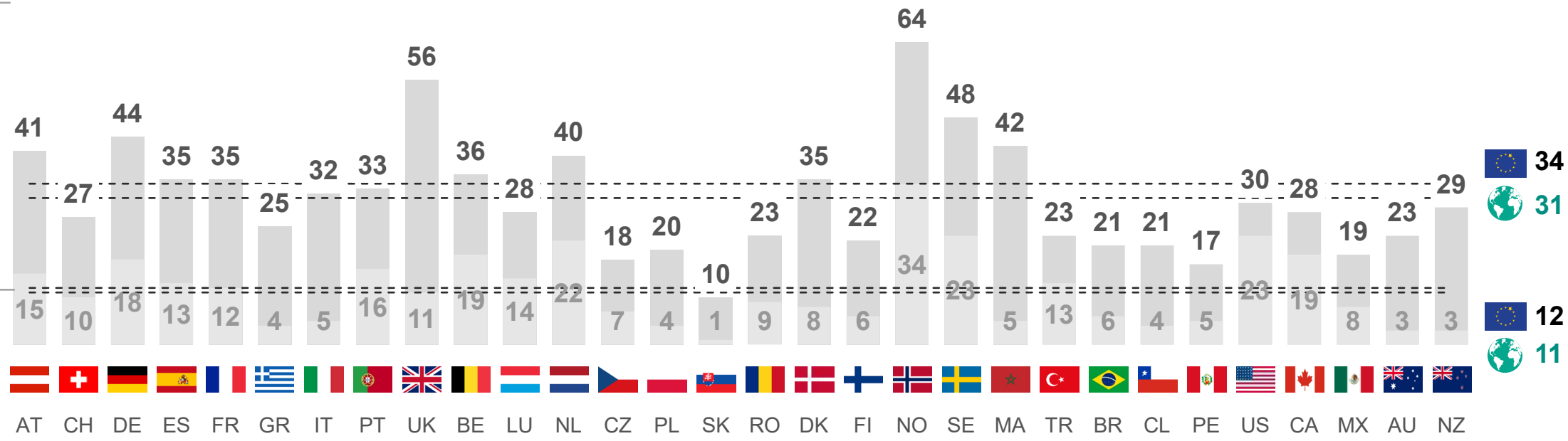
LCVs

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

ALREADY USING

HOW TO READ THE RESULTS ?

In Australia, 23% of the companies are already using or consider to implement at least one alternative technology in the next 3 years. 3% of the companies is currently using at least one.



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

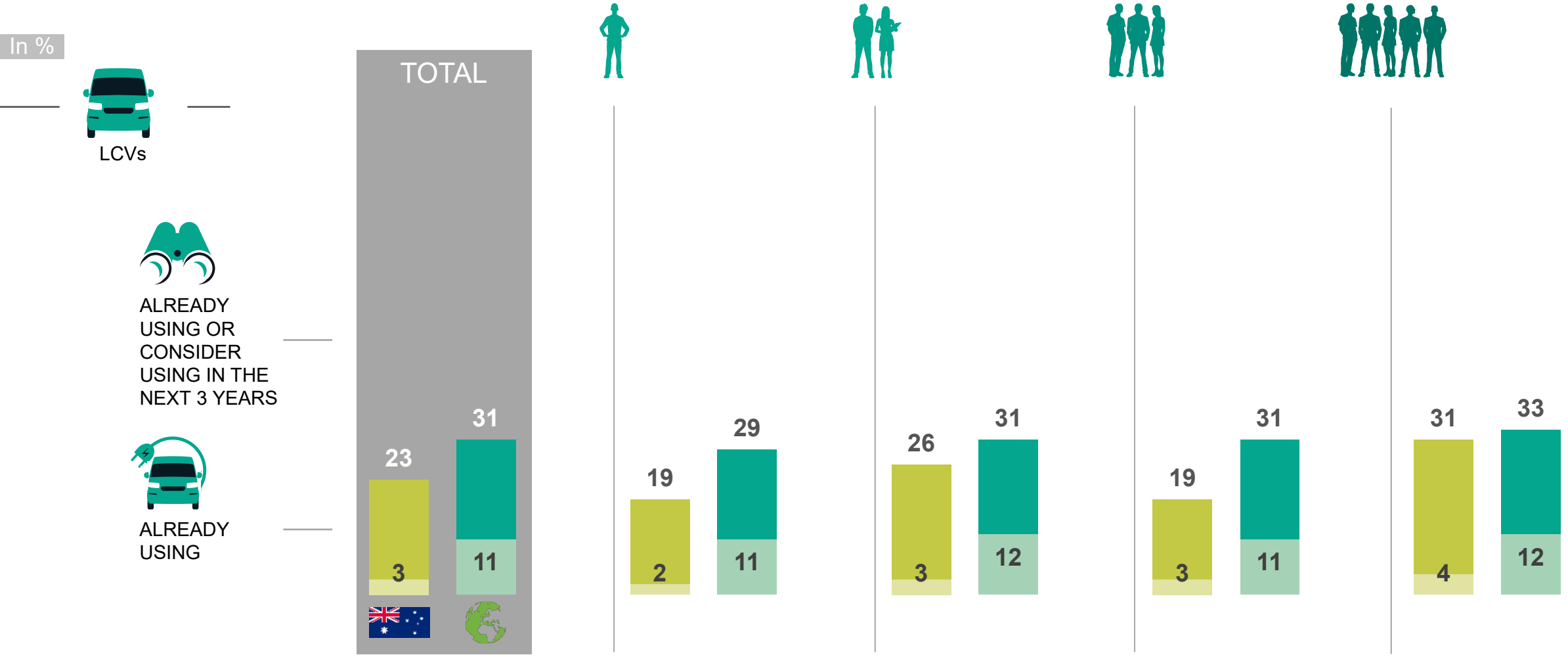
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CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

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



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

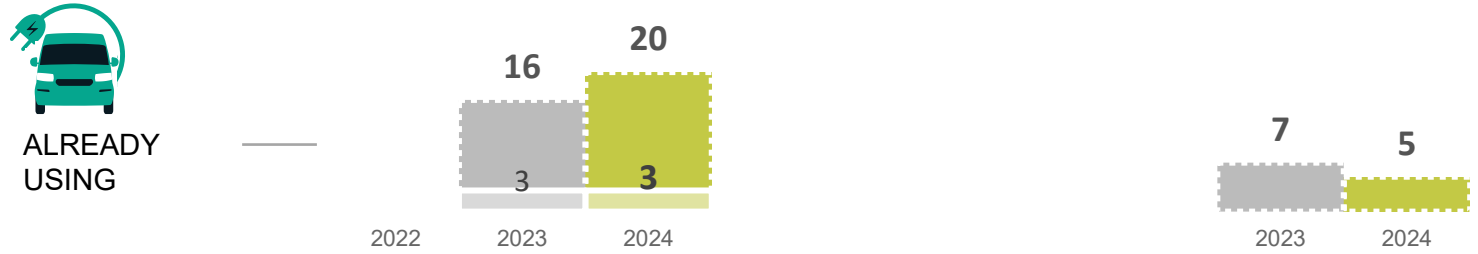
Evolution vs. previous years

In %

LCVs

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

ALREADY USING



	2022	2023	2024
ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS	21	25	25 ▲
ALREADY USING	7	9	10 ▲

	2023	2024
ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS	9	9
ALREADY USING	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

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ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

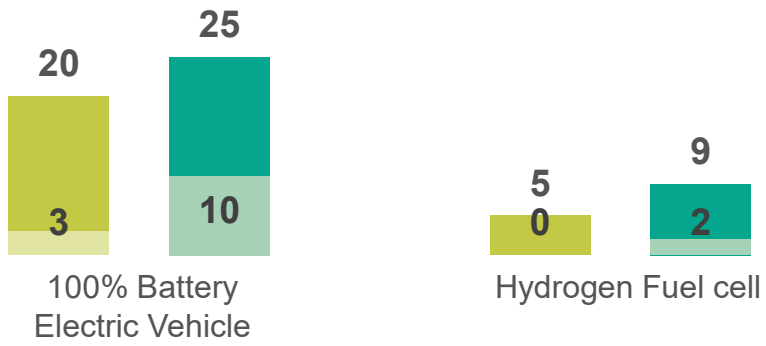
LCV Fleet

In %

LCVs

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

ALREADY IMPLEMENTED



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

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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

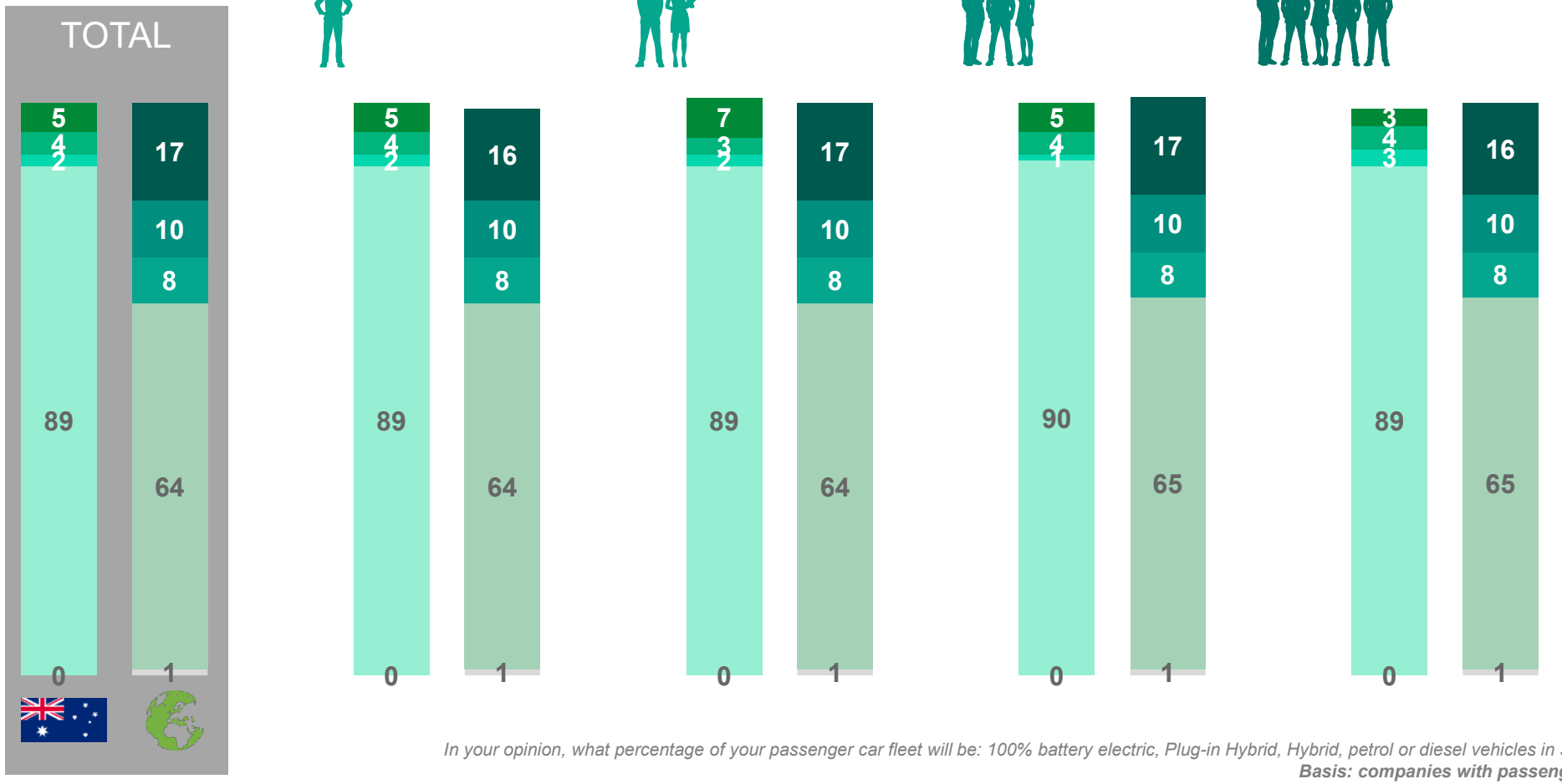
EXPECTED FLEET SHARE PER ENERGY

HOW TO READ THE RESULTS ?

In Australia in 3 years, 5% 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

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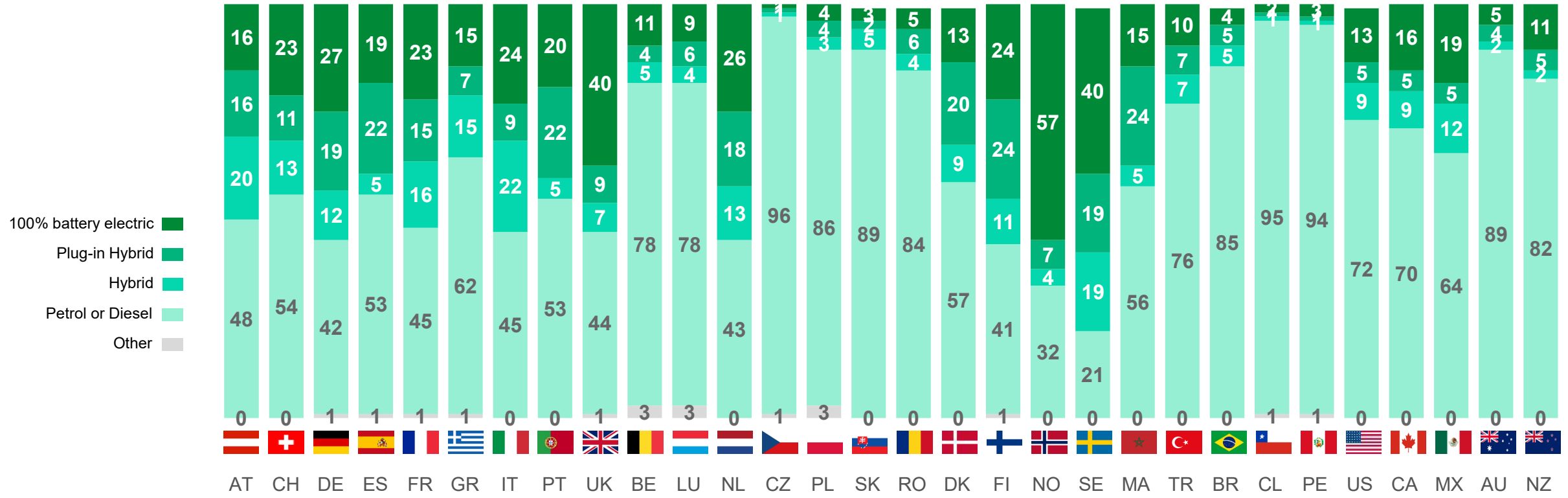
EXPECTED FLEET SHARE PER ENERGY

HOW TO READ THE RESULTS ?

In Australia in 3 years, 5% 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

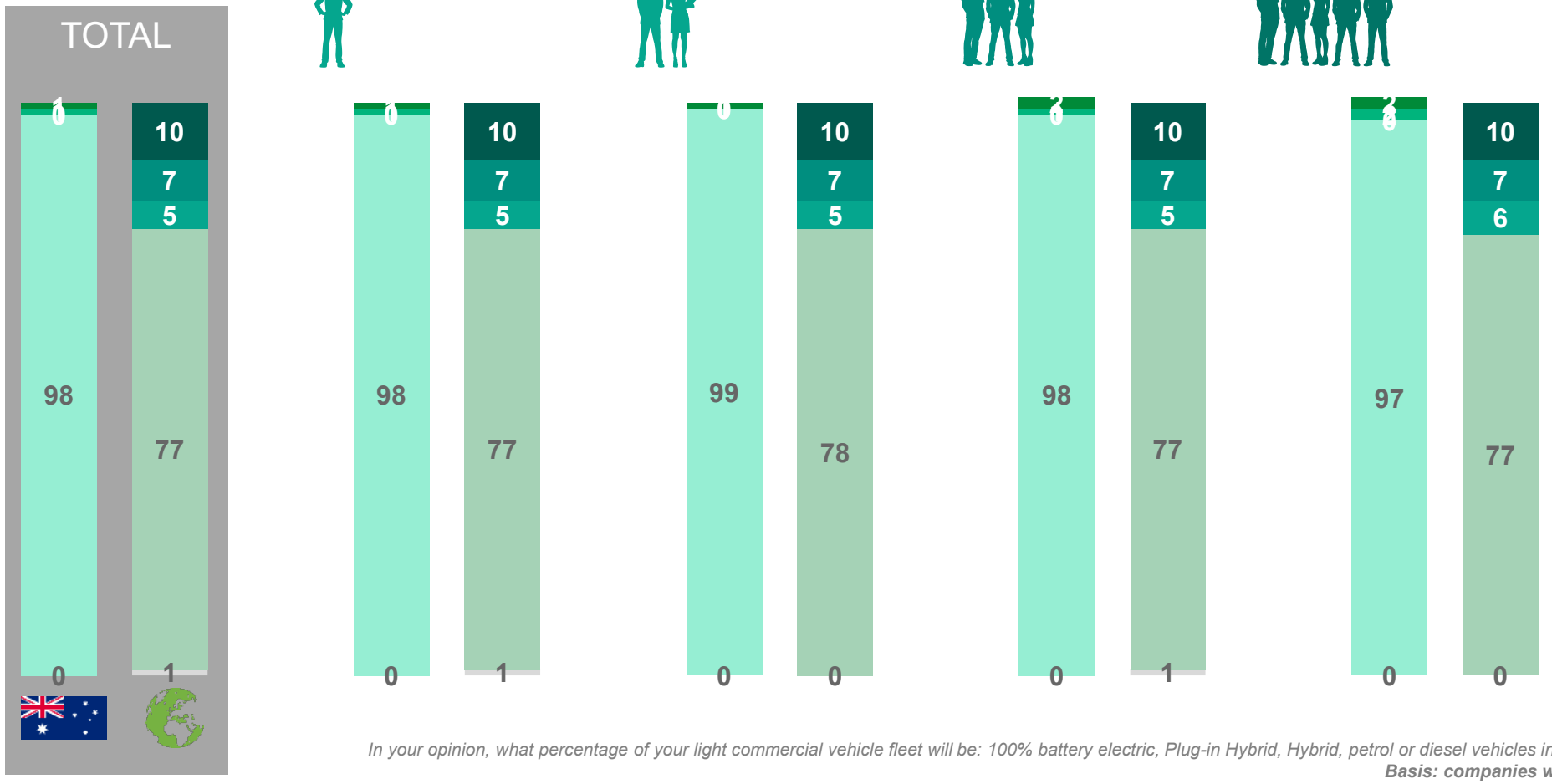
EXPECTED FLEET SHARE PER ENERGY

HOW TO READ THE RESULTS ?

In Australia in 3 years, 1% of the light commercial vehicle fleet is expected to be 100% BEV.

In %

LCVs



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

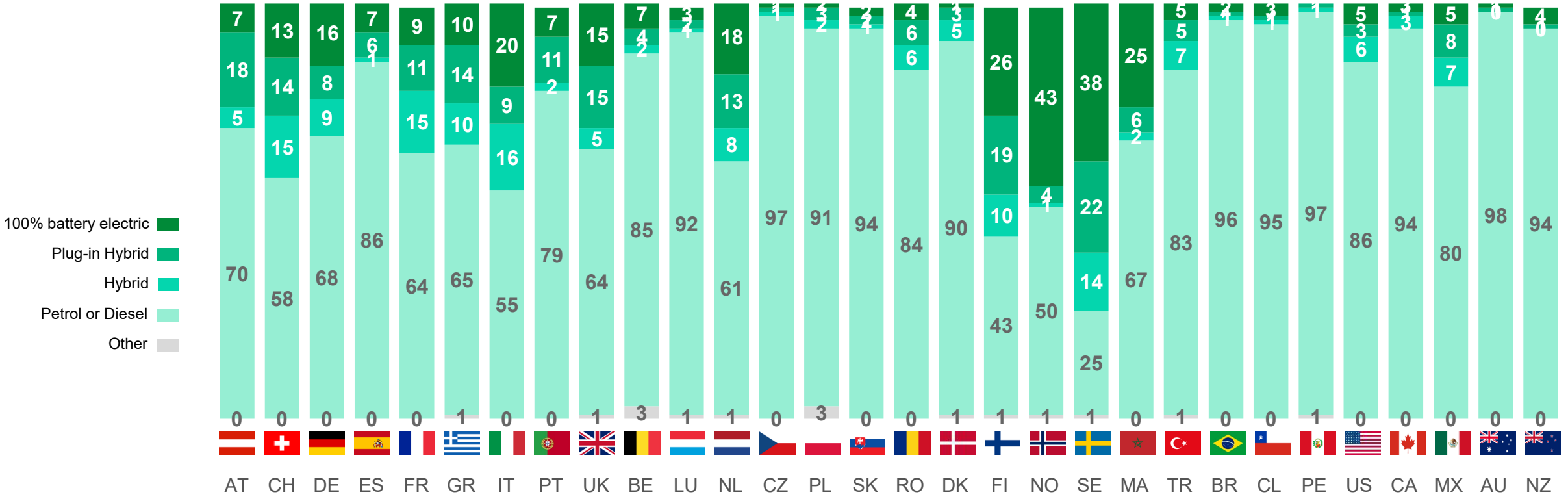
EXPECTED FLEET SHARE PER ENERGY

In %

LCVs

HOW TO READ THE RESULTS ?

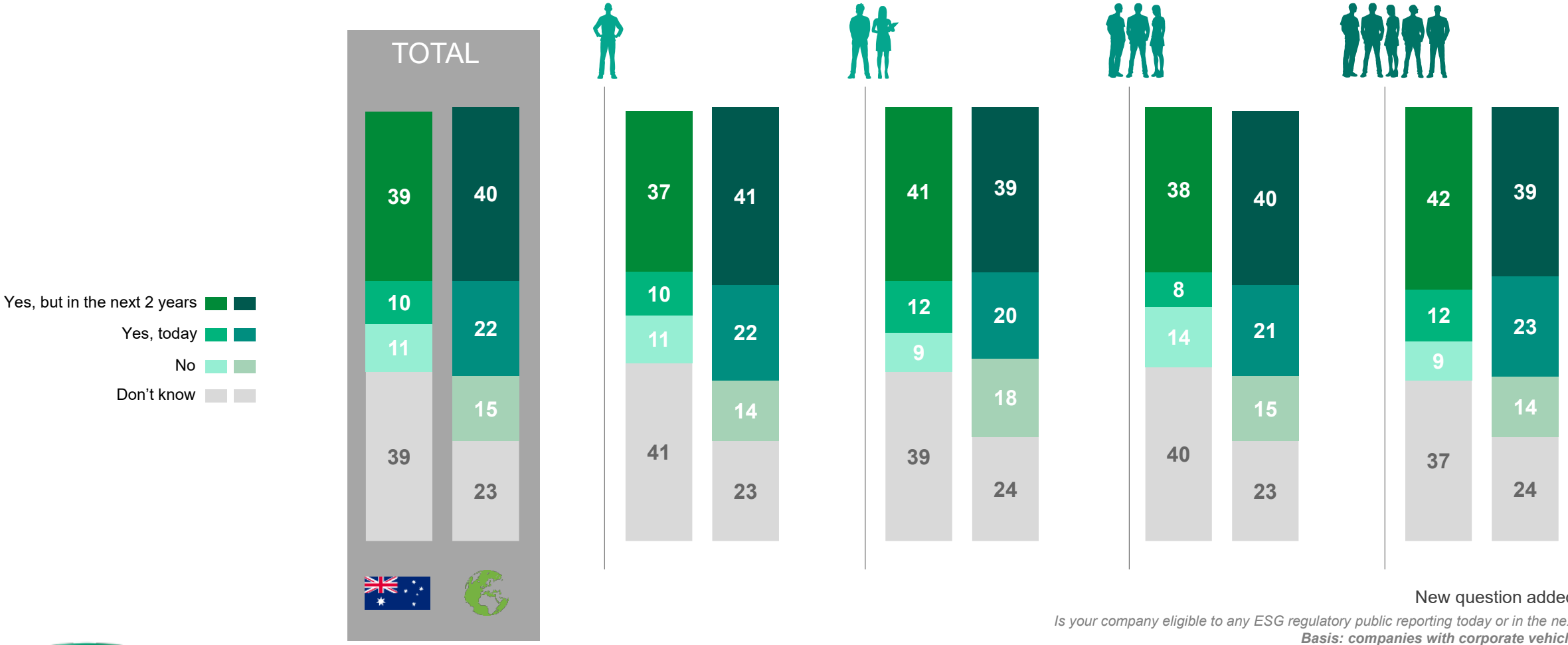
In Australia in 3 years, 1% of the light commercial vehicle fleet is expected to be 100% BEV.



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

ELIGIBILITY TO ESG REGULATORY PUBLIC REPORTING

In %



New question added in 2024

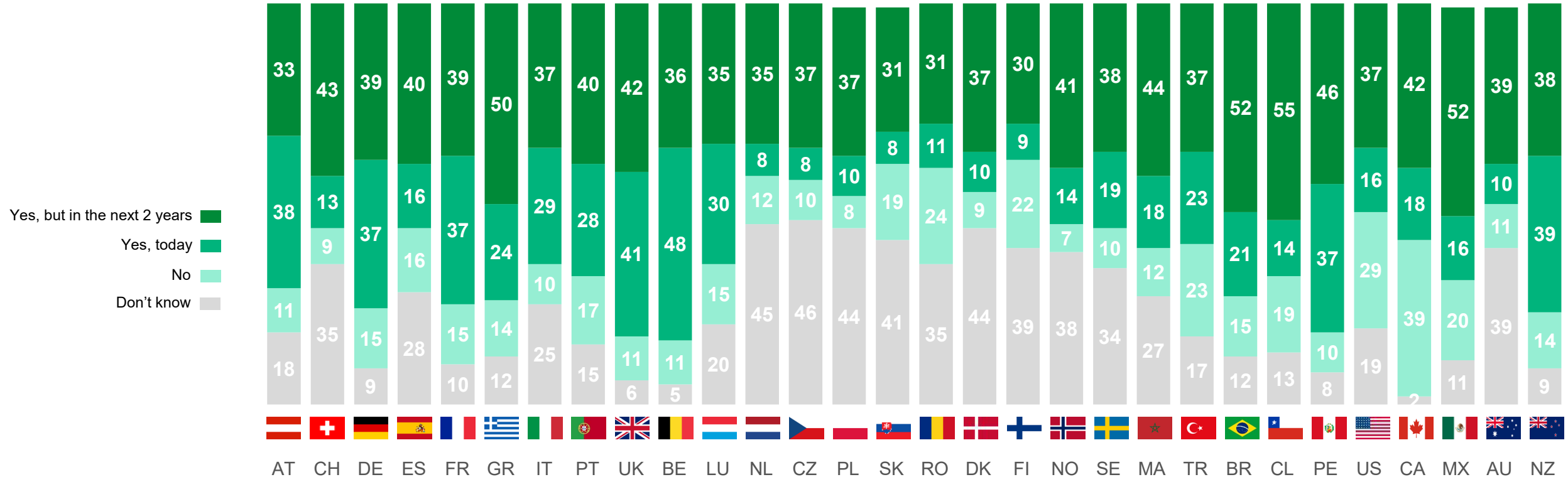
Is your company eligible to any ESG regulatory public reporting today or in the next 2 years?
Basis: companies with corporate vehicles = 100%

Arval Mobility Observatory

element | ARVAL BNP PARIBAS GROUP
ELEMENT-ARVAL GLOBAL ALLIANCE

ELIGIBILITY TO ESG REGULATORY PUBLIC REPORTING

In %

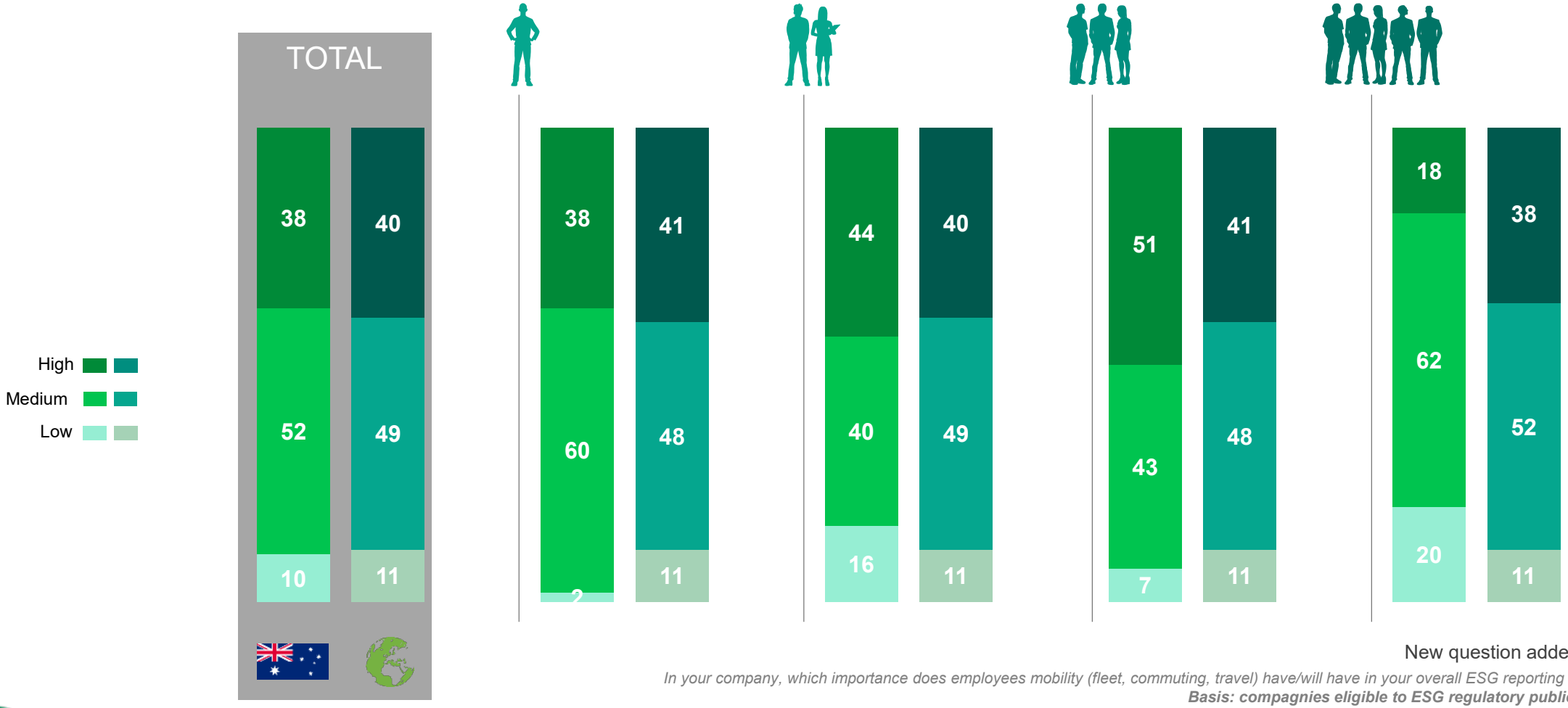


New question added in 2024

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

IMPORTANCE OF EMPLOYEES MOBILITY IN ESG REPORTING

In %



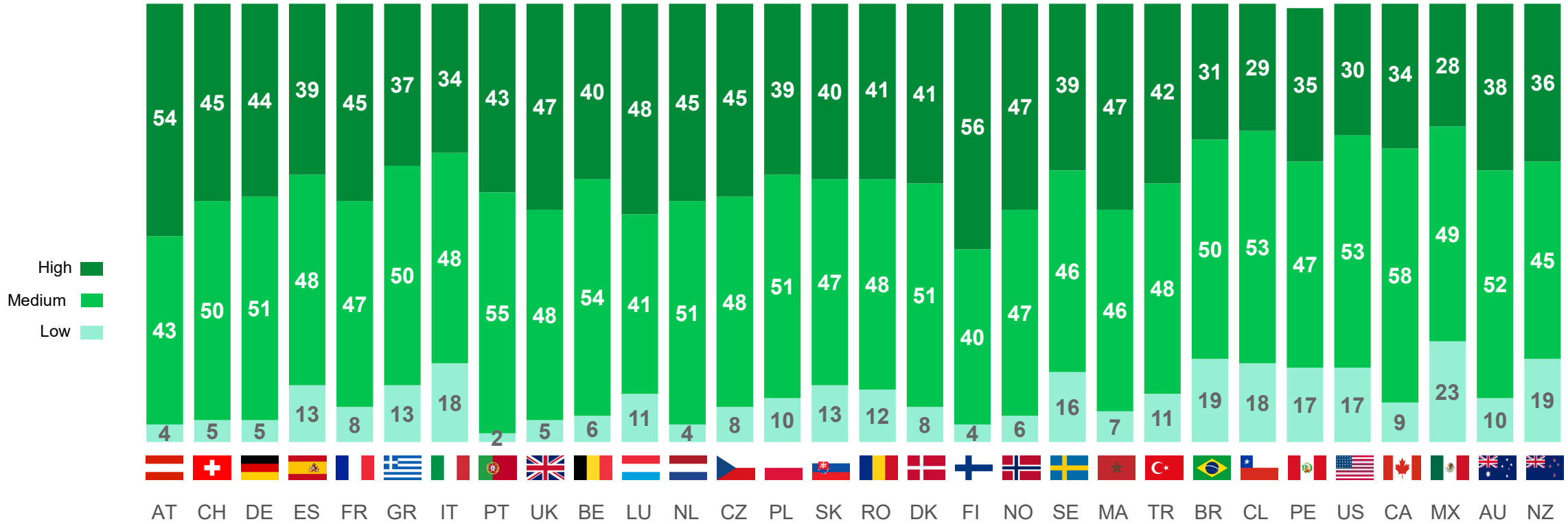
New question added in 2024

In your company, which importance does employees mobility (fleet, commuting, travel) have/will have in your overall ESG reporting approach ?

Basis: compagnies 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: compagnies eligible to ESG regulatory public reporting

5

ENERGY MIX
FOCUS PER ALTERNATIVE TECHNOLOGY



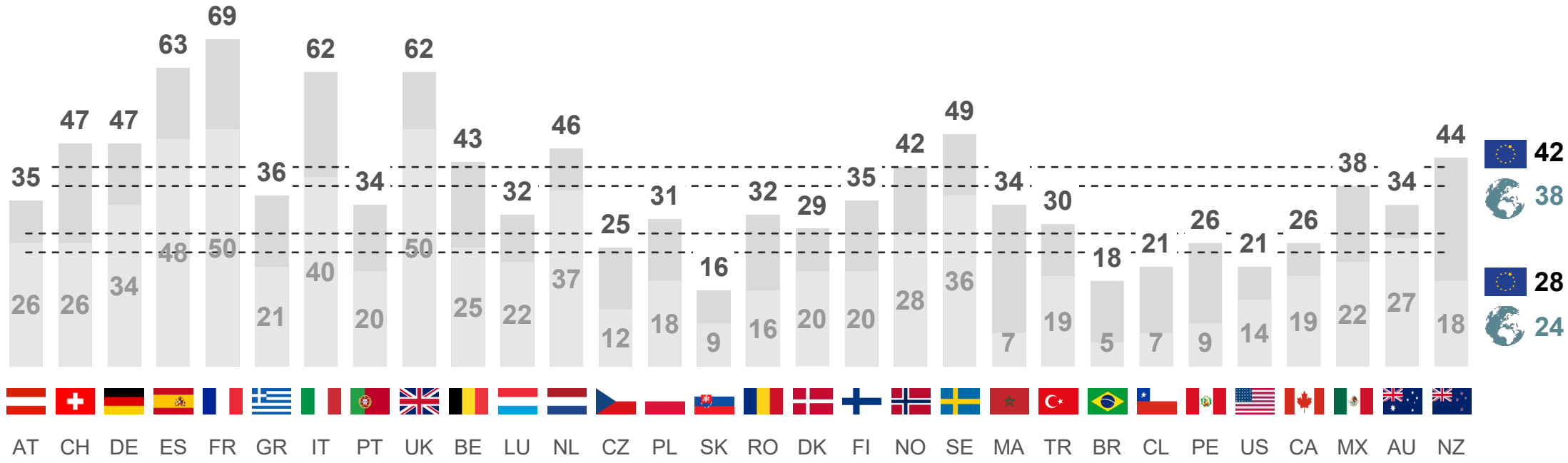
HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

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

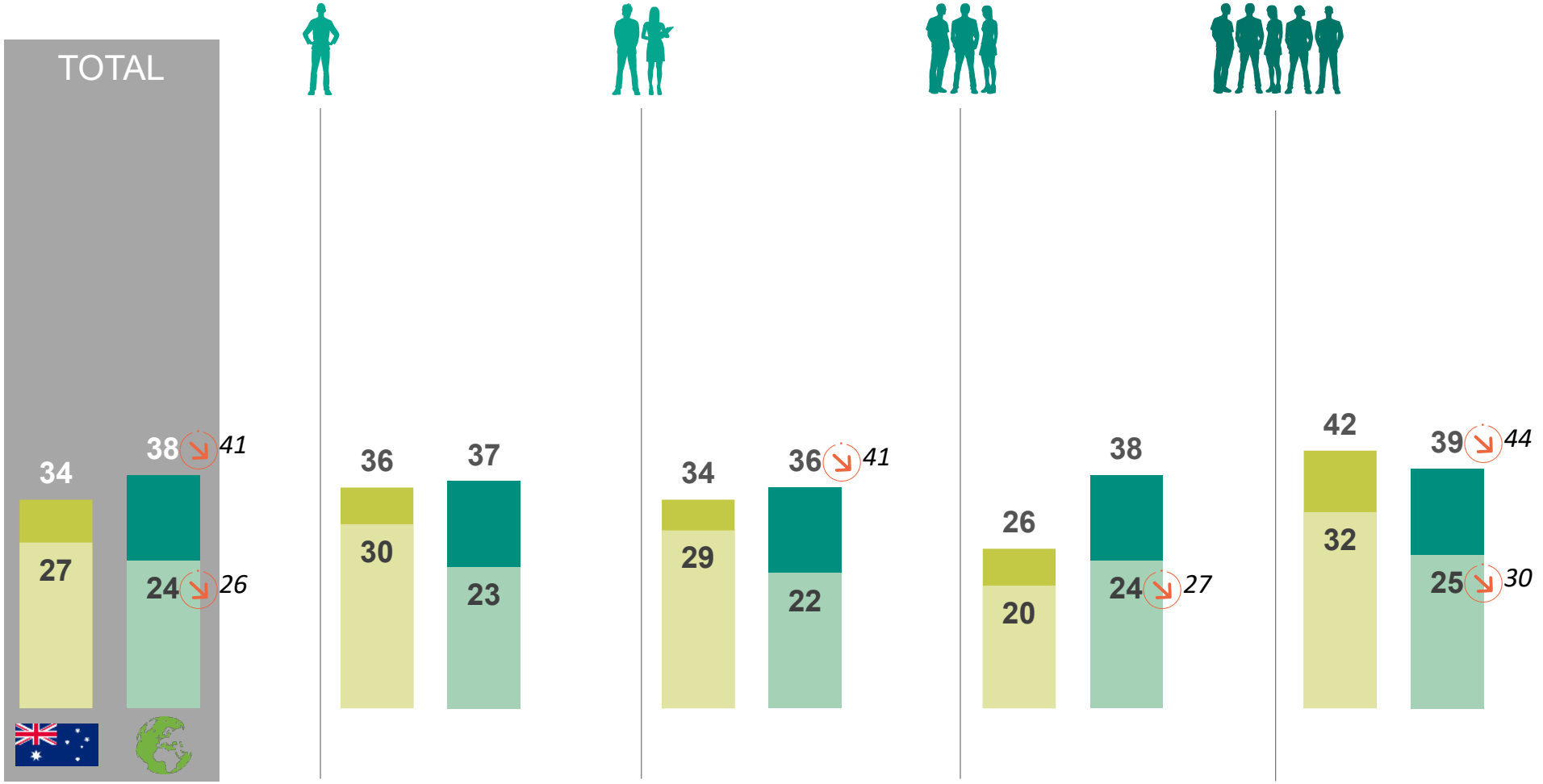
HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %

Passenger cars

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

ALREADY USING



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

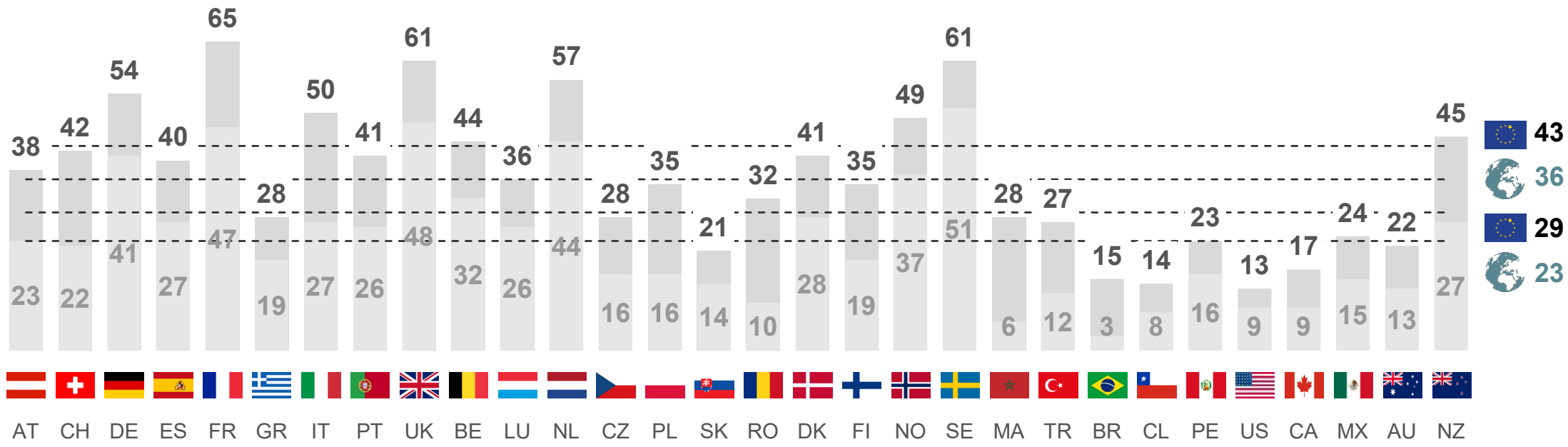
PLUG-IN HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %

Passenger cars

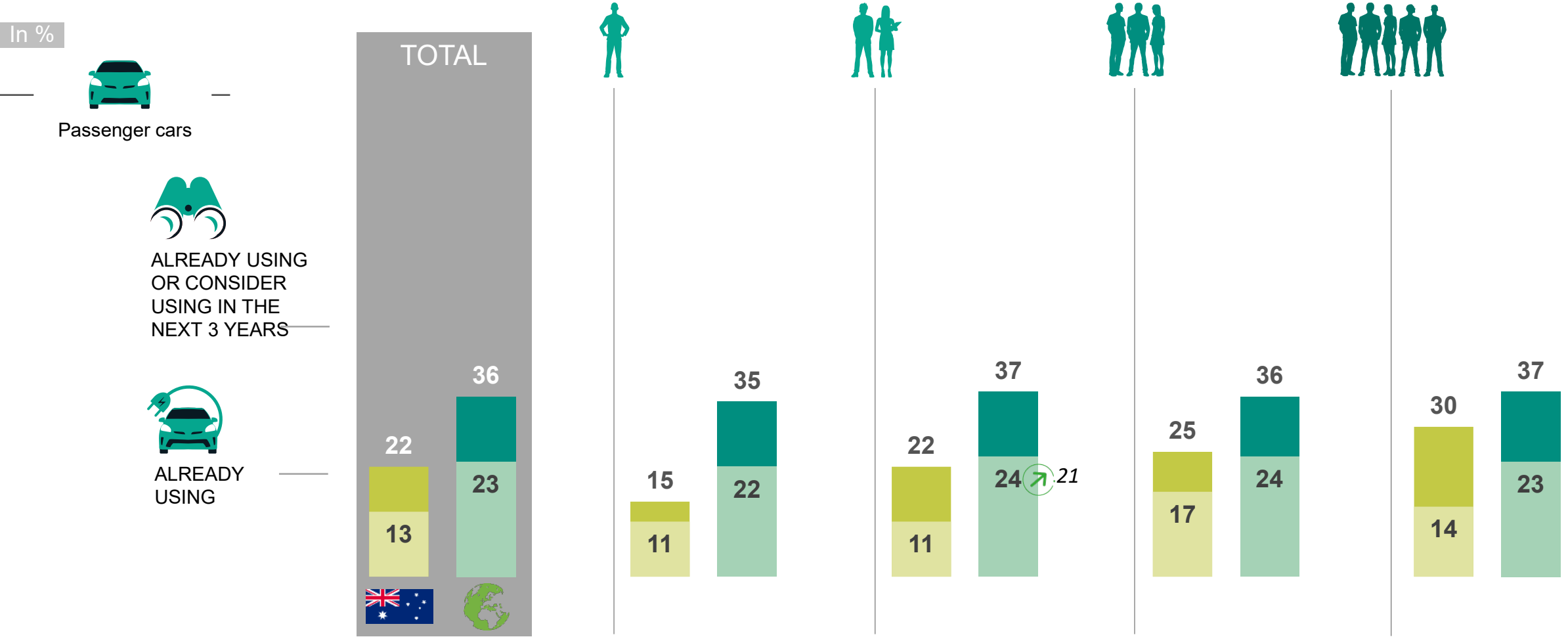
ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



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

PLUG-IN HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY



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

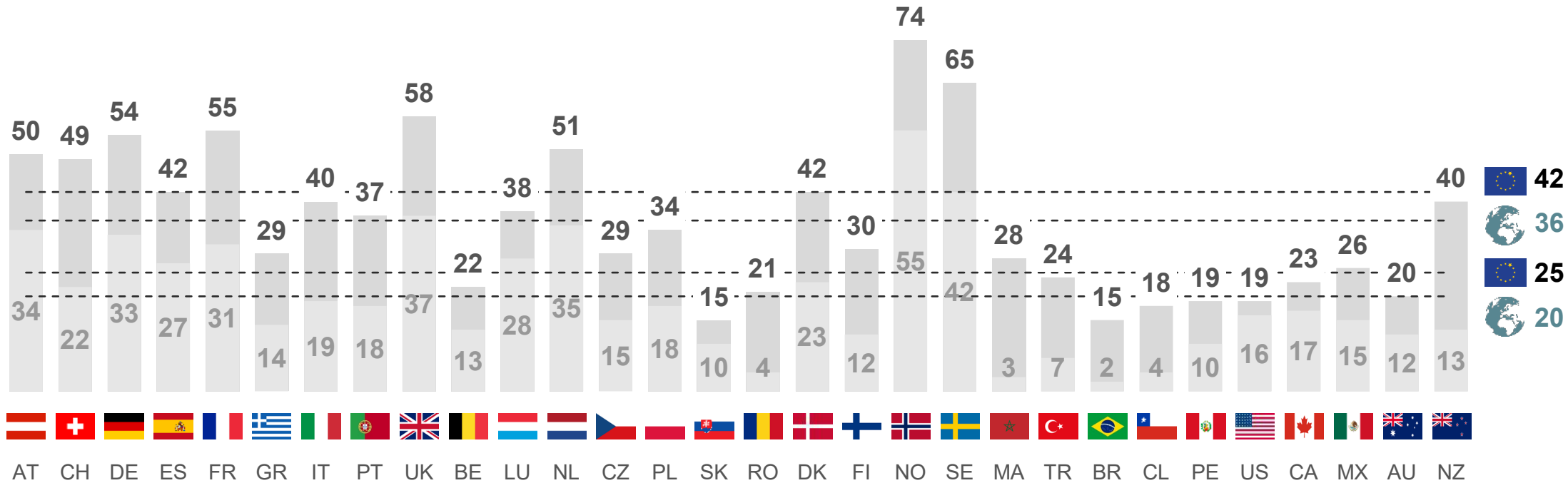
100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %

Passenger cars

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



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

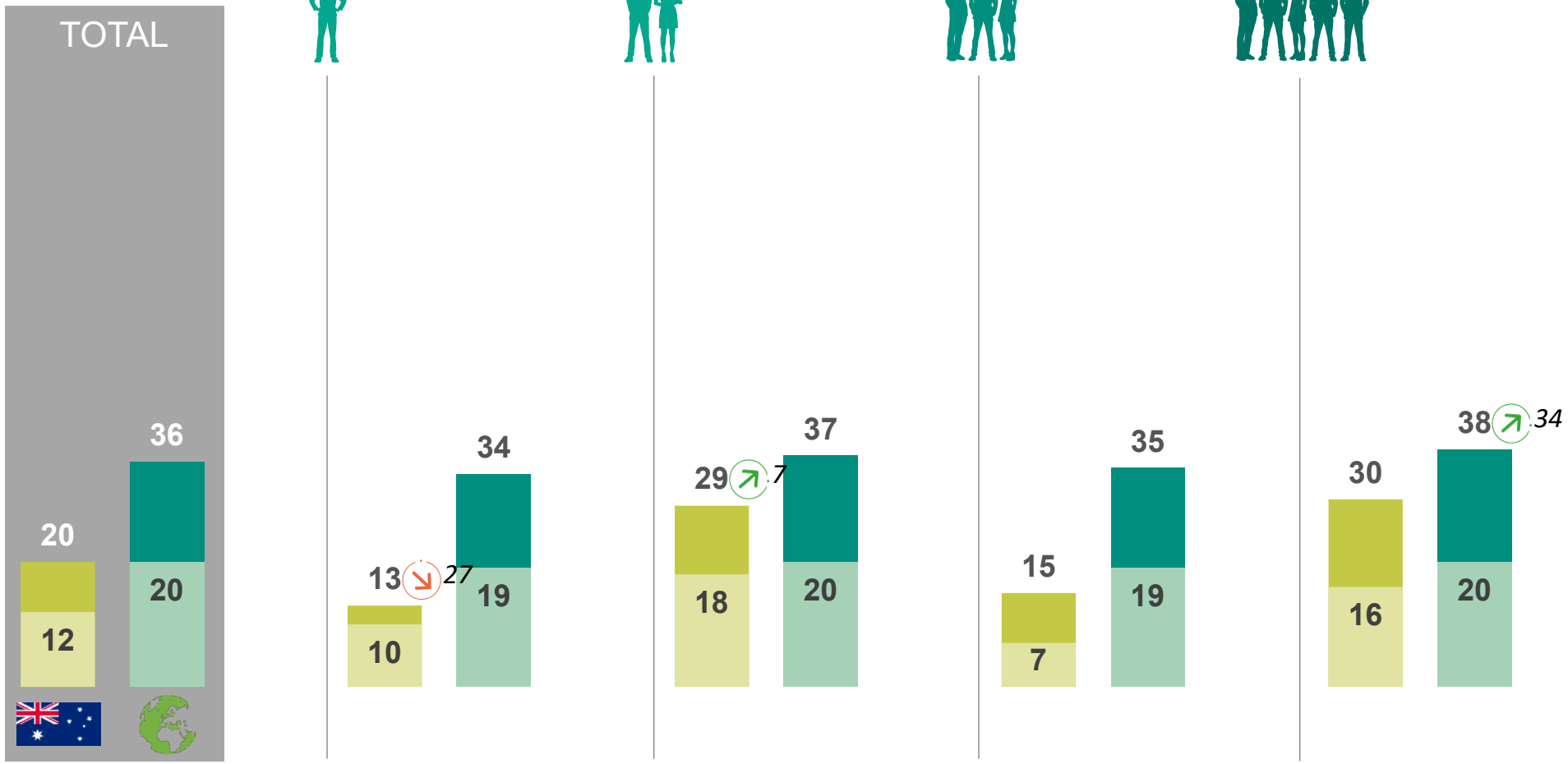
100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %

Passenger cars

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

ALREADY USING



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

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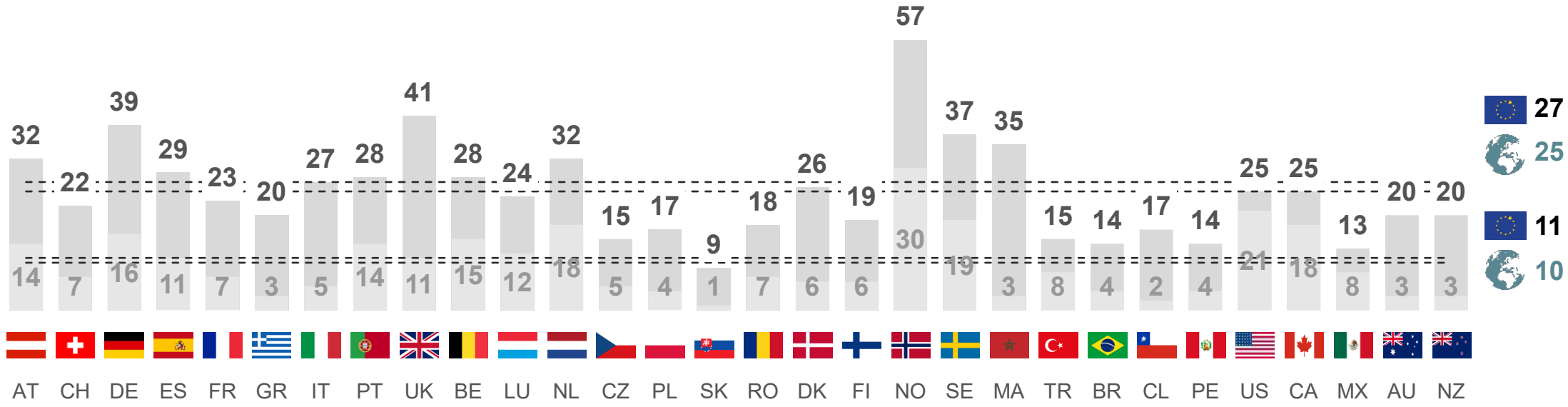
100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %

LCVs

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



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

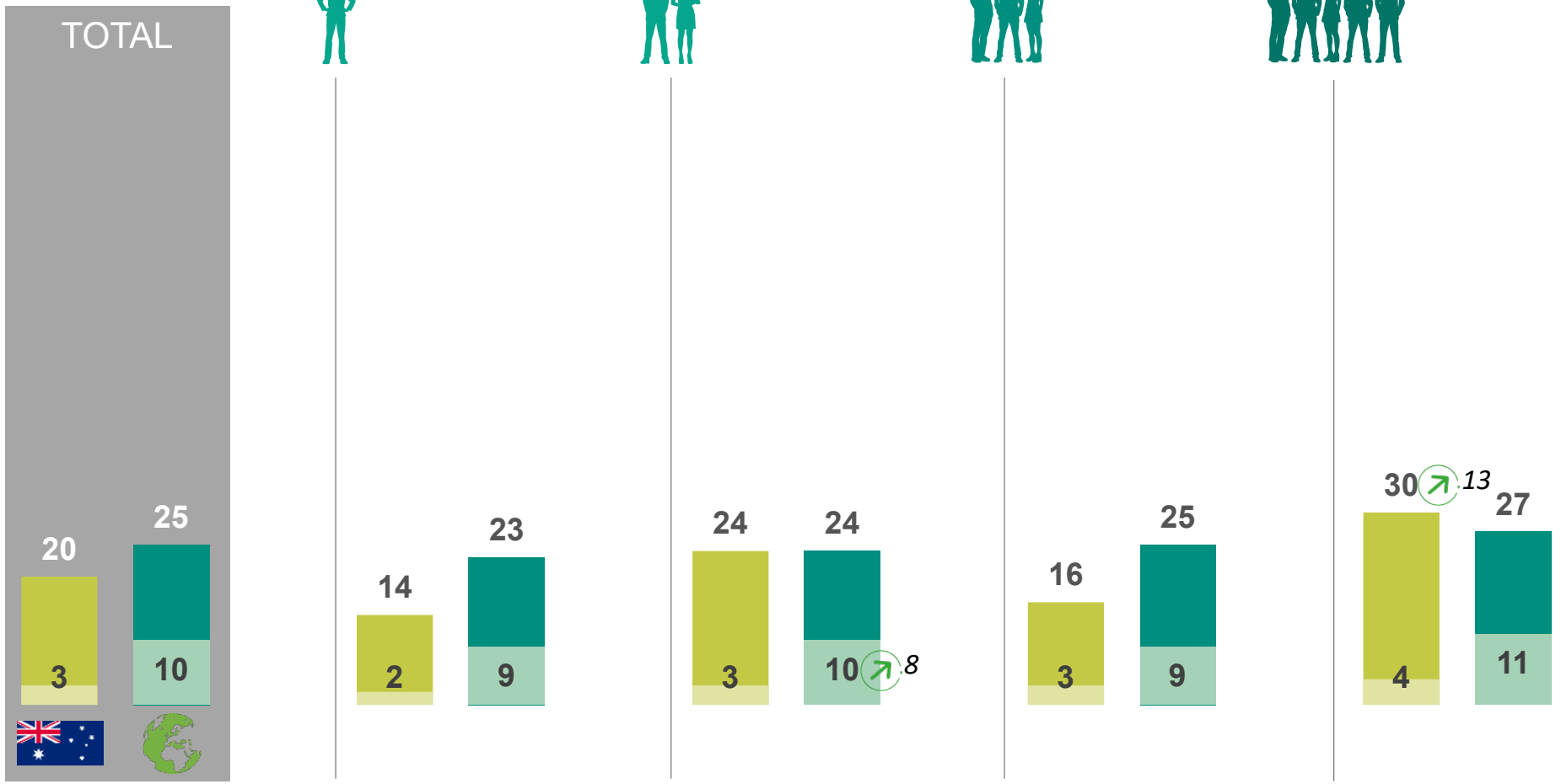
100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %

LCVs

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

ALREADY USING



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

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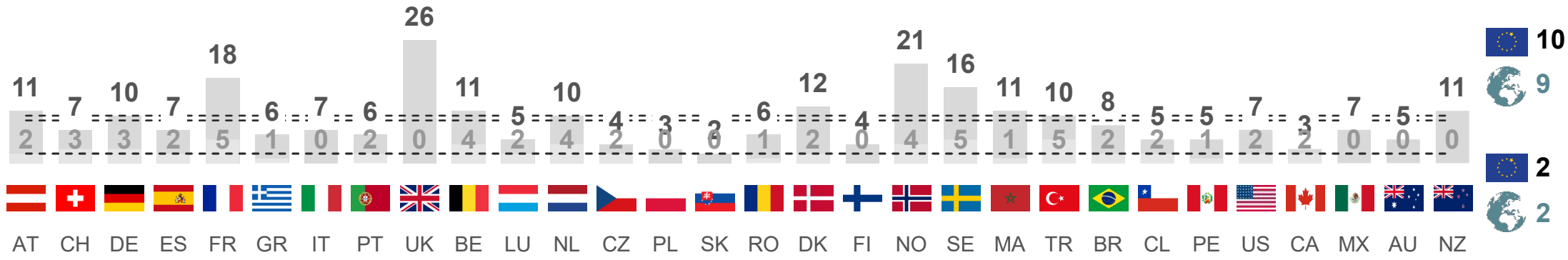
HYDROGEN FUEL CELL ELECTRIC VEHICLE : IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %

LCVs

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

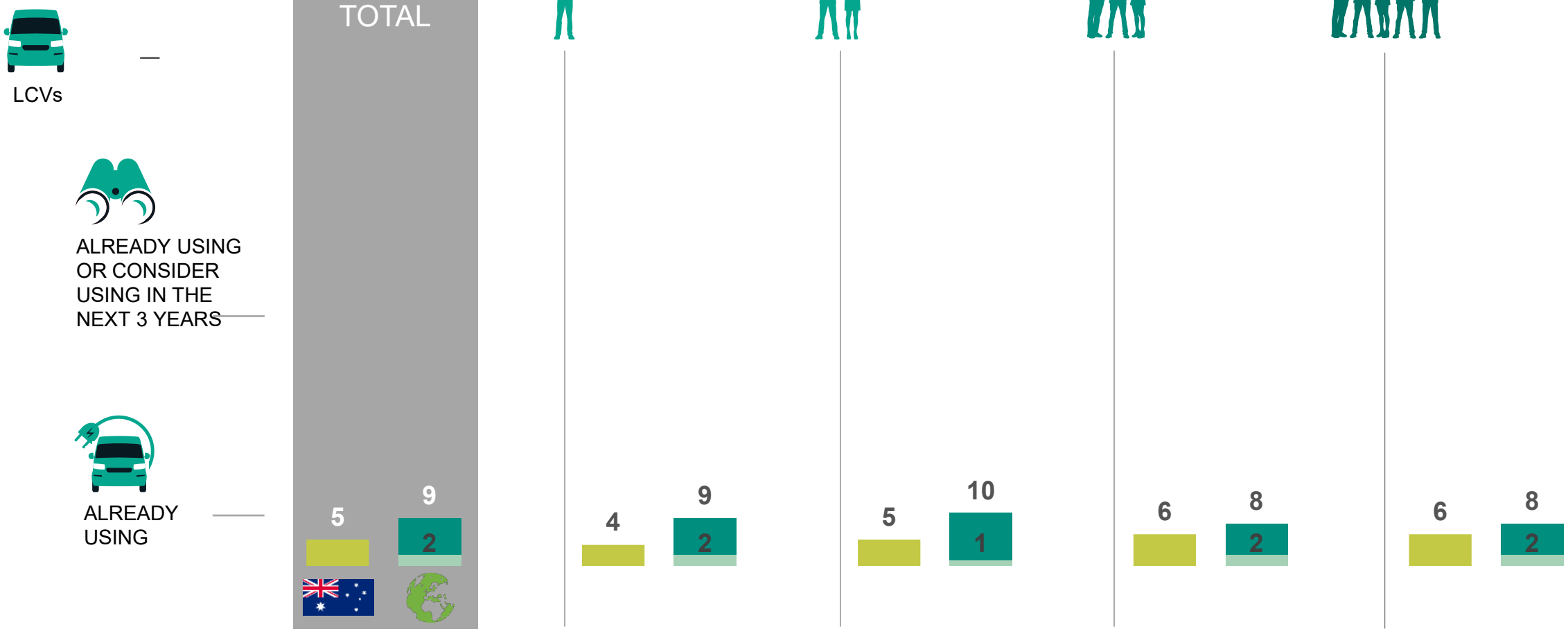
ALREADY USING



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

In %



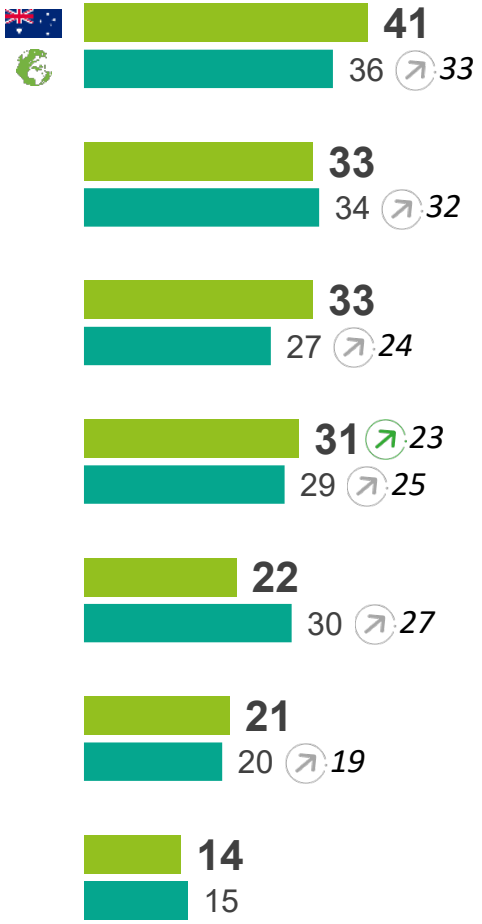
Amongst the following alternative fuel technologies, which ones do you currently use…?
Amongst the following alternative fuel technologies, which ones are you considering using…?
Basis: companies with LCVs

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CONSTRAINTS OF 100% BATTERY ELECTRIC VEHICLE USAGE

In %

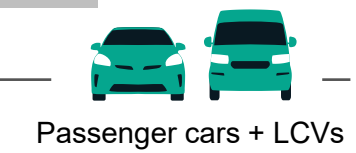
Passenger cars + LCVs



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

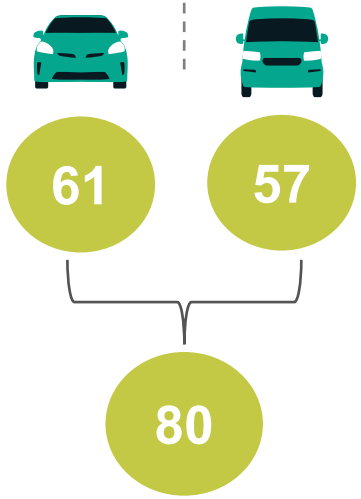
CONSTRAINTS OF 100% BATTERY ELECTRIC VEHICLE USAGE

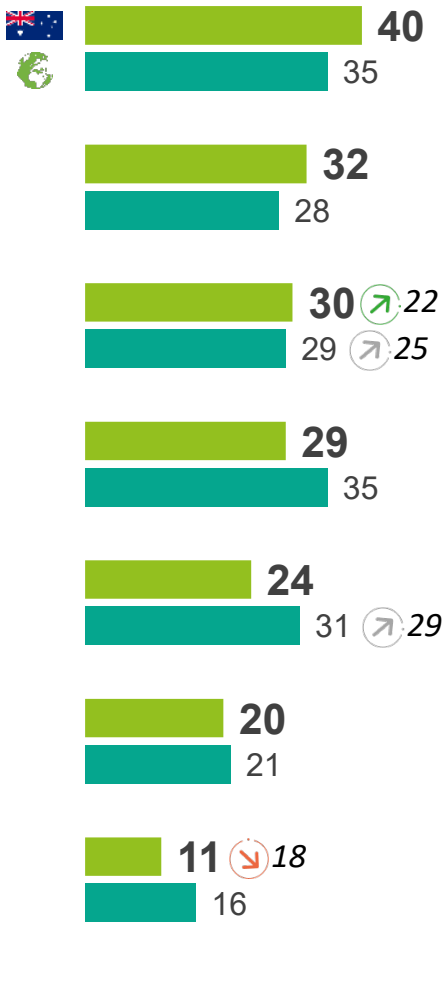
In %



Passenger cars + LCVs

do not consider implementing battery electric vehicles



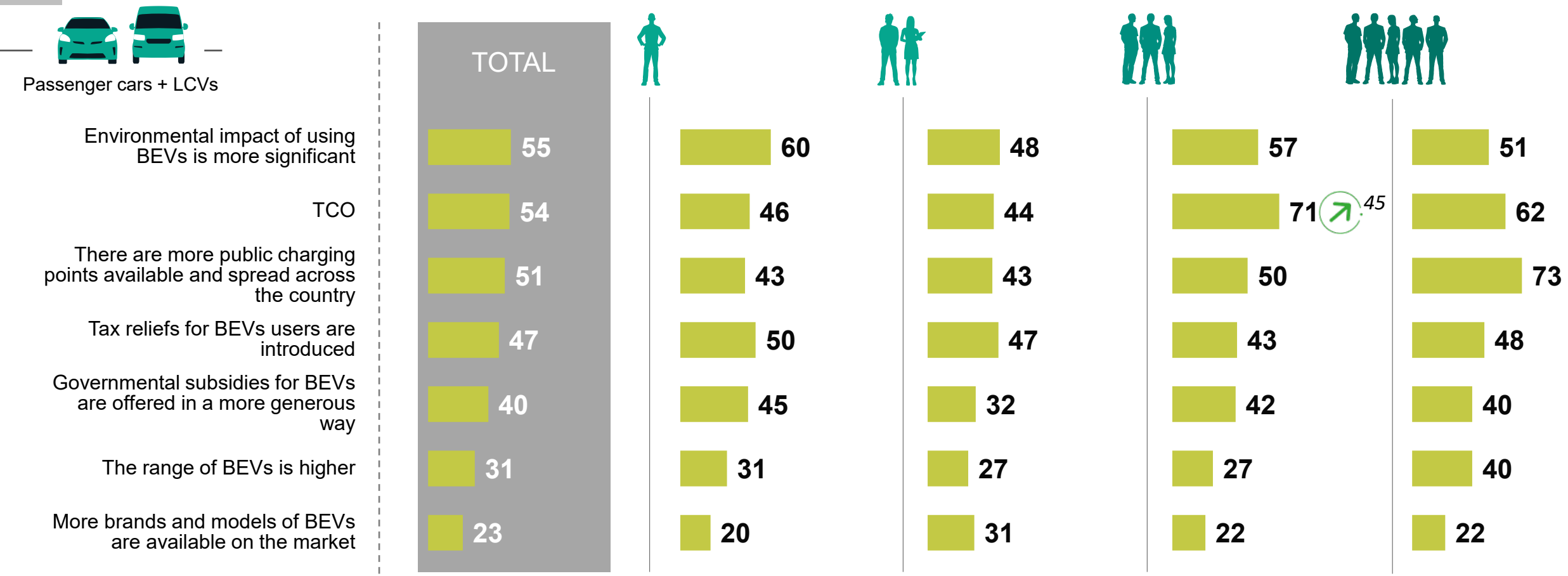


What are the constraints of using 100% Battery Electric vehicles?
Basis: Not considering implementing 100% BEV technology

MAIN REASONS TO START ORDERING MORE BEVS

In %

Passenger cars + LCVs



What would be the main reasons for your company to start ordering more BEVs (battery electric vehicles)?
Basis: consider implementing alternative fuel technologies

ACCESS TO CHARGING POINTS

In %

Passenger cars + LCVs





	TOTAL				
Currently no charging points installed at the company premises	69 ↗ 48 / 47 ↗ 42	76 / 47 ↗ 42	63 / 47 ↗ 43	65 / 47 ↗ 43	72 / 46 ↗ 40
Drivers have to pay for home installation of charging points	38 / 26	33 / 25	38 / 25	29 / 26	48 / 27
Charging points are planned to be installed at the company premises in the next 12 months	18 / 30	16 / 30	15 / 29	22 / 31	19 / 29
Charging points installed at the company premises and free charging for drivers	14 / 13 ↘ 15	14 / 12 ↘ 15	19 / 14	11 / 12	13 / 13
Company subsidises cost of home installations of charging points for drivers	9 / 20 ↗ 16	8 / 19	12 / 21 ↗ 14	11 / 19 ↗ 16	6 / 21
Charging points installed at the company premises and drivers charged for charging	4 ↘ 14 / 7	7 / 7	3 / 7	5 / 6	3 / 6

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

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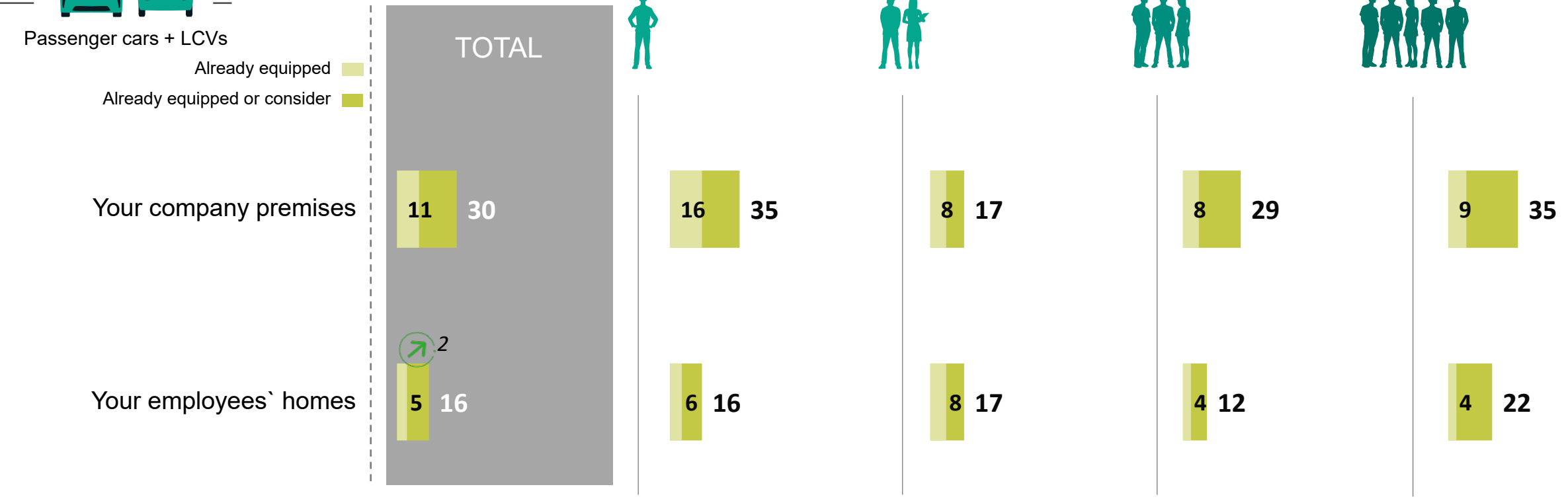
ELEMENT-ARVAL GLOBAL ALLIANCE

EQUIPMENT IN CHARGING POINTS

In %



Passenger cars + LCVs



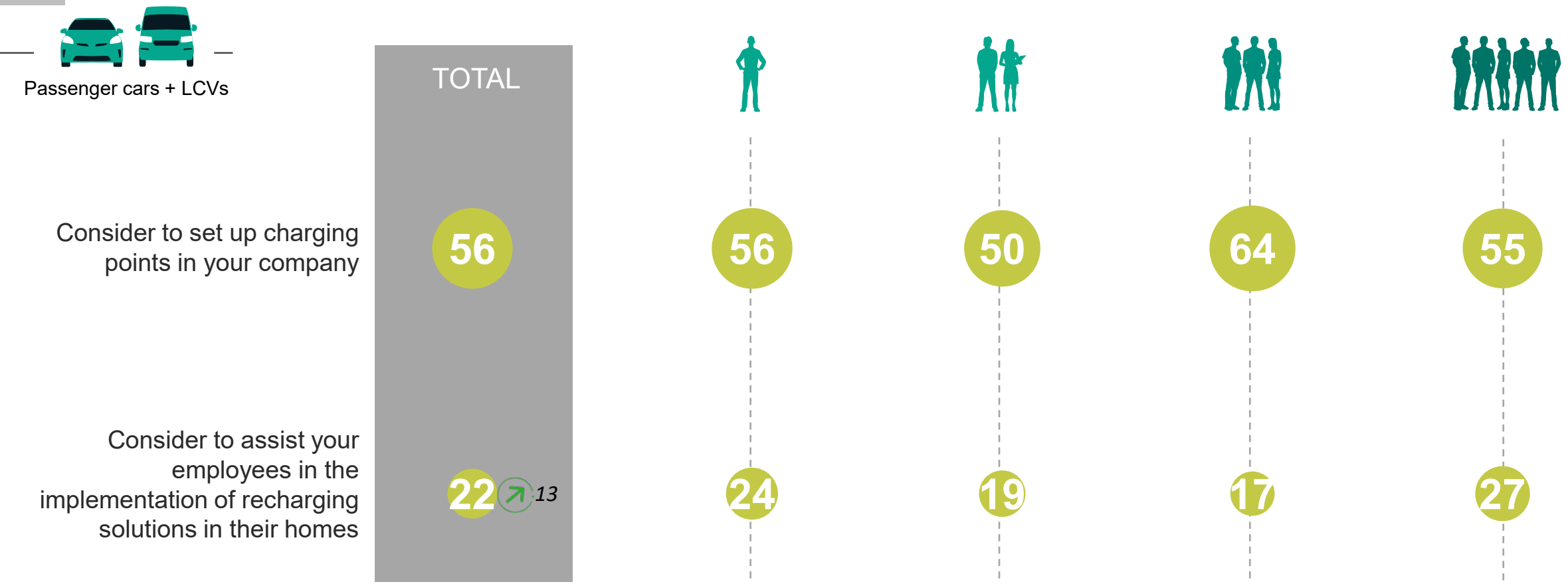
Have you already equipped or are you considering to equip in the next 12 months the following premises with the charging points?
Basis: companies with corporate vehicles = 100%

COMPANY'S STRATEGY TOWARDS PROVIDING CHARGING POINTS

Among companies that already own or consider 100% Battery Electric Vehicle

In %

Passenger cars + LCVs



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

6

WHAT ARE THE PERSPECTIVES IN TERMS OF MOBILITY SOLUTIONS?





MOBILITY SOLUTIONS

TOP 3 USED SOLUTIONS

		AU	Global
#1	Private lease/Salary sacrifice	20% (↗ 10)	13%
#2	Car or cash allowance	14%	17%
#3	Mobility Budget: a predefined budget provided by the company that allows employees to choose their mode of transport	8%	15%

TOP 3 POTENTIAL NEXT 3 YEARS

		AU	Global
#1	Private lease/Salary sacrifice	37% (↗ 21)	24%
#2	Car or cash allowance	19%	28%
#3	A short or mid term rental vehicle to provide mobility for an employee	18%	27%

A STILL LIMITED ADOPTION OF MOBILITY SOLUTIONS

1

In a context where private cars are the mean of commuting the most common for 7 out of 10 companies, **the adoption of mobility solutions in Australia remains below the global average**. Half of the companies have adopted at least one (75% globally).

Private lease / salary sacrifice comes #1 (20%), followed by car/cash allowance (14%). Private lease / salary sacrifice is also the solution with the highest growth potential in the next 3 years (37%), far above car/cash allowance (19%) and mobility budget (18%).

2

HR related needs (talent recruitment, employees retainment), improving companies' attractiveness and tax incentives are the main drivers for considering or implementing mobility solutions – which remain perceived as add-ons to corporate vehicles mainly anyhow, essential business transport tools for most companies.

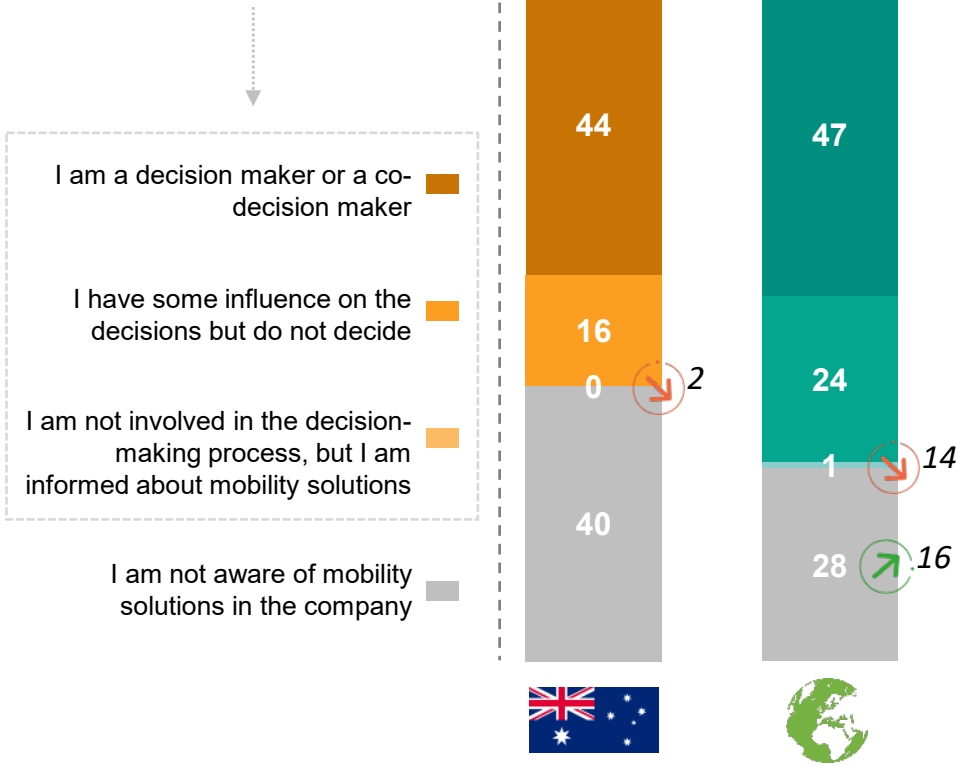
3

Lastly, **1 out of 2 companies has a policy in place for cars that are owned by employees but used on business**.

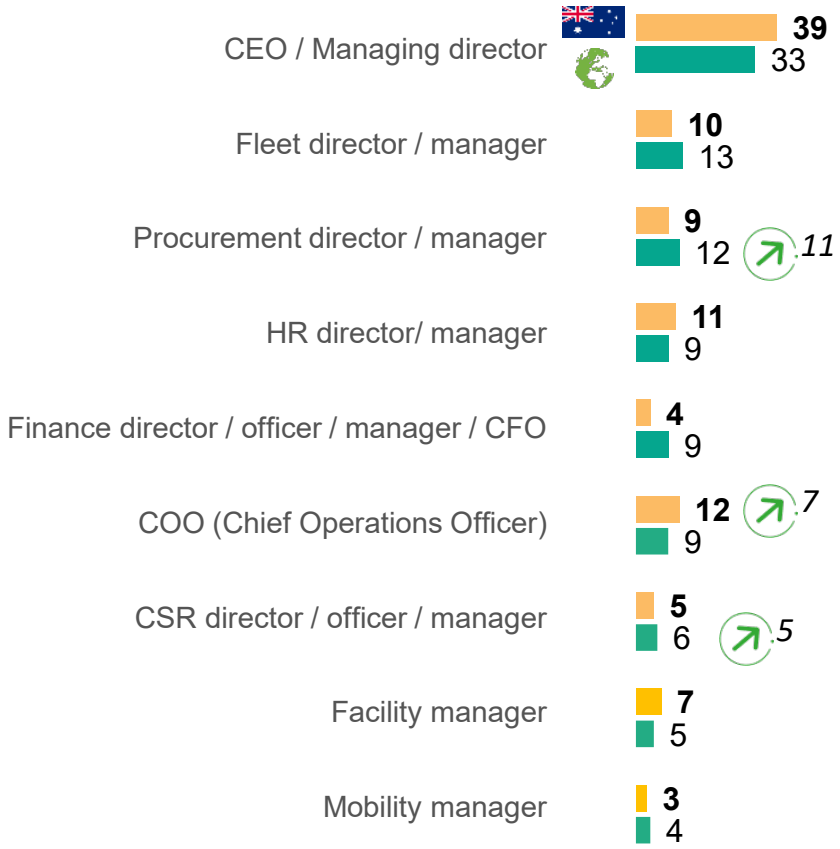
MOBILITY SOLUTION DECISION MAKERS

RESPONDENTS INVOLVEMENT IN MOBILITY SOLUTION DECISIONS

NET ARE AWARE OF MOBILITY SOLUTIONS
(Decision maker, influencer or informed)



POSITION OF THE PERSON WHO DECIDES ON MOBILITY SOLUTIONS

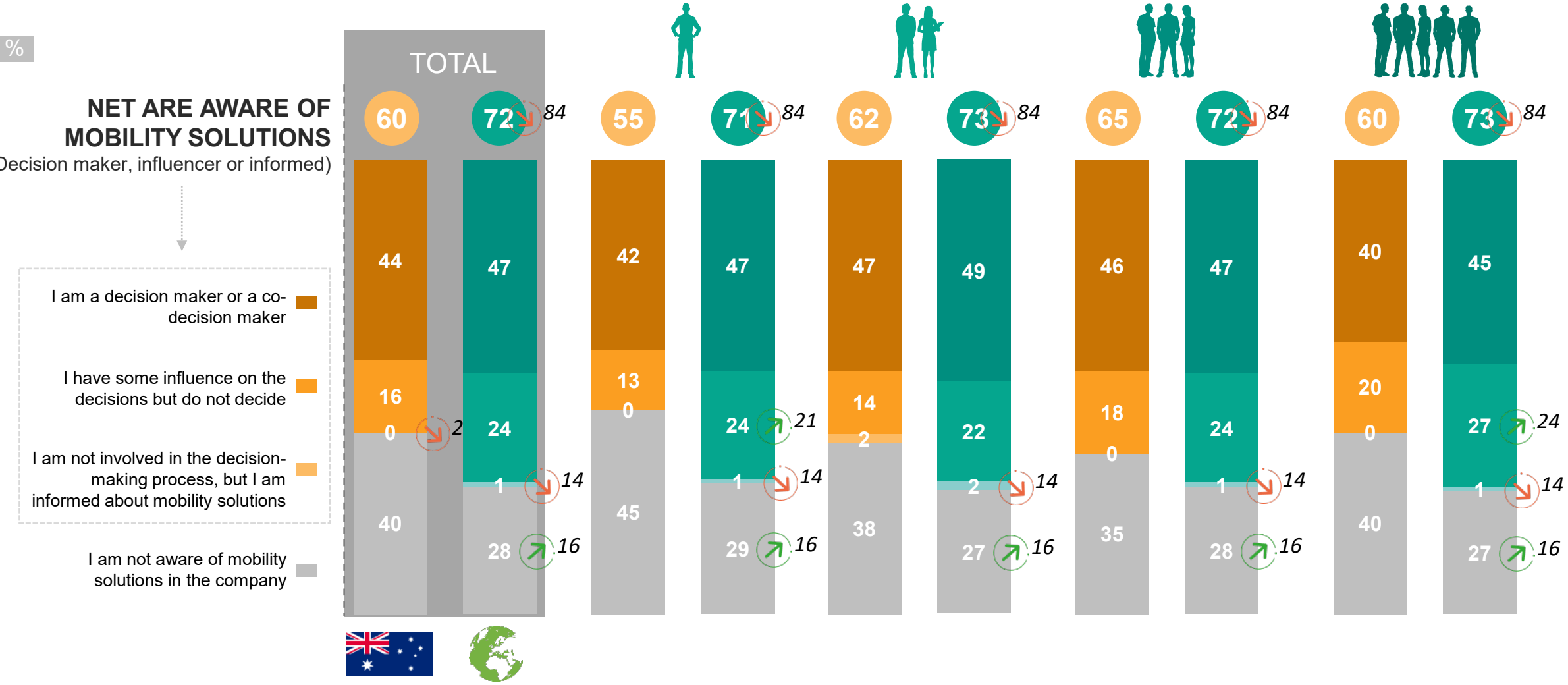


To what extent are you informed about mobility solutions using other modes of transportation than company cars (such as car sharing , bike sharing etc….)
What is the position of the person who decides on mobility solutions in your company??
Basis: companies with corporate vehicles = 100%

RESPONDENTS INVOLVEMENT IN MOBILITY SOLUTION DECISIONS

In %

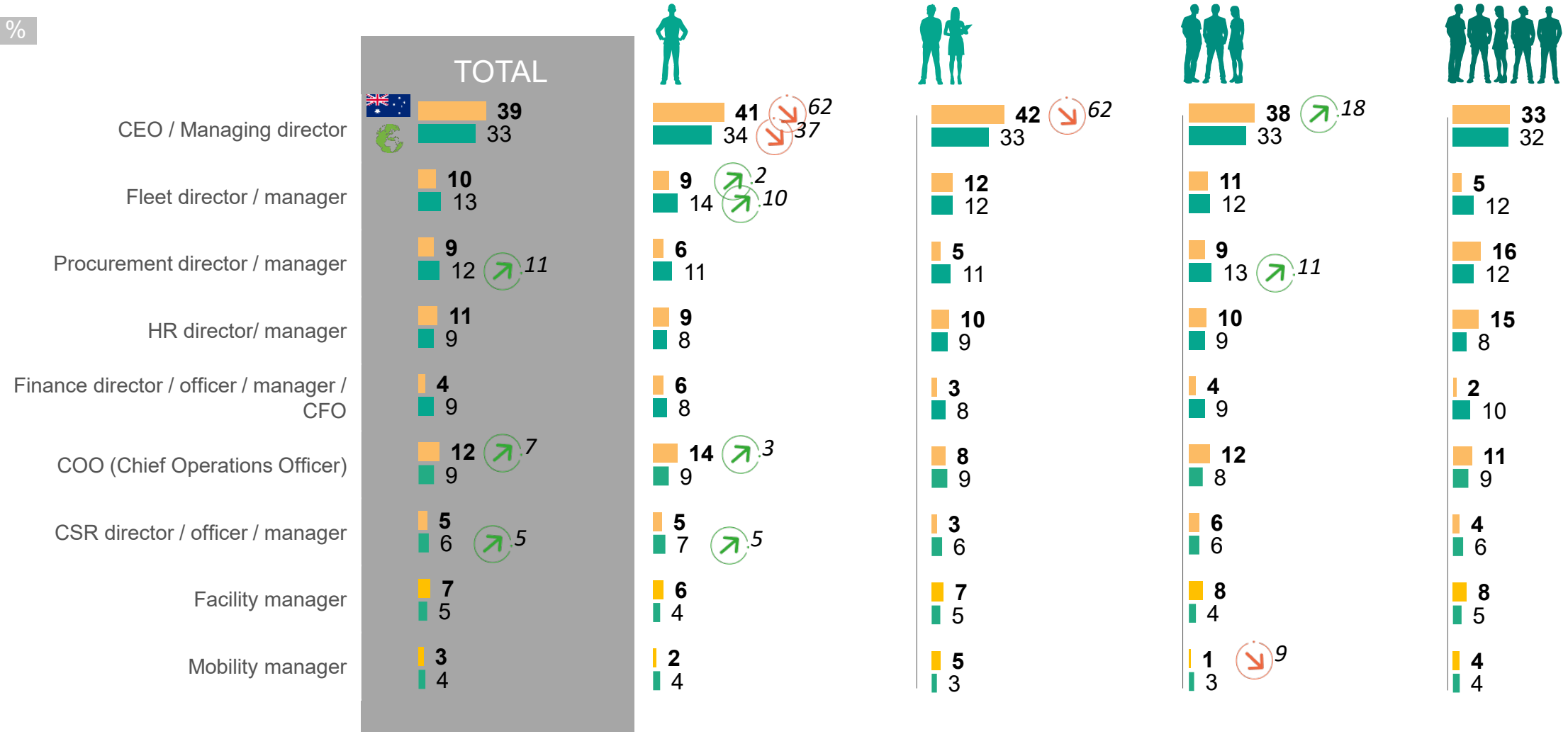
NET ARE AWARE OF MOBILITY SOLUTIONS
(Decision maker, influencer or informed)



To what extent are you informed about mobility solutions using other modes of transportation than company cars (such as car sharing , bike sharing etc….)
Basis: companies with corporate vehicles = 100%

POSITION OF THE PERSON WHO DECIDES ON MOBILITY SOLUTIONS

In %



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

MOBILITY SOLUTIONS LIST AND DEFINITIONS



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



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



PUBLIC TRANSPORT



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



AN APP PROVIDED BY THE COMPANY TO BOOK MOBILITY SOLUTIONS



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)



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



CAR OR CASH ALLOWANCE

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ELEMENT-ARVAL GLOBAL ALLIANCE

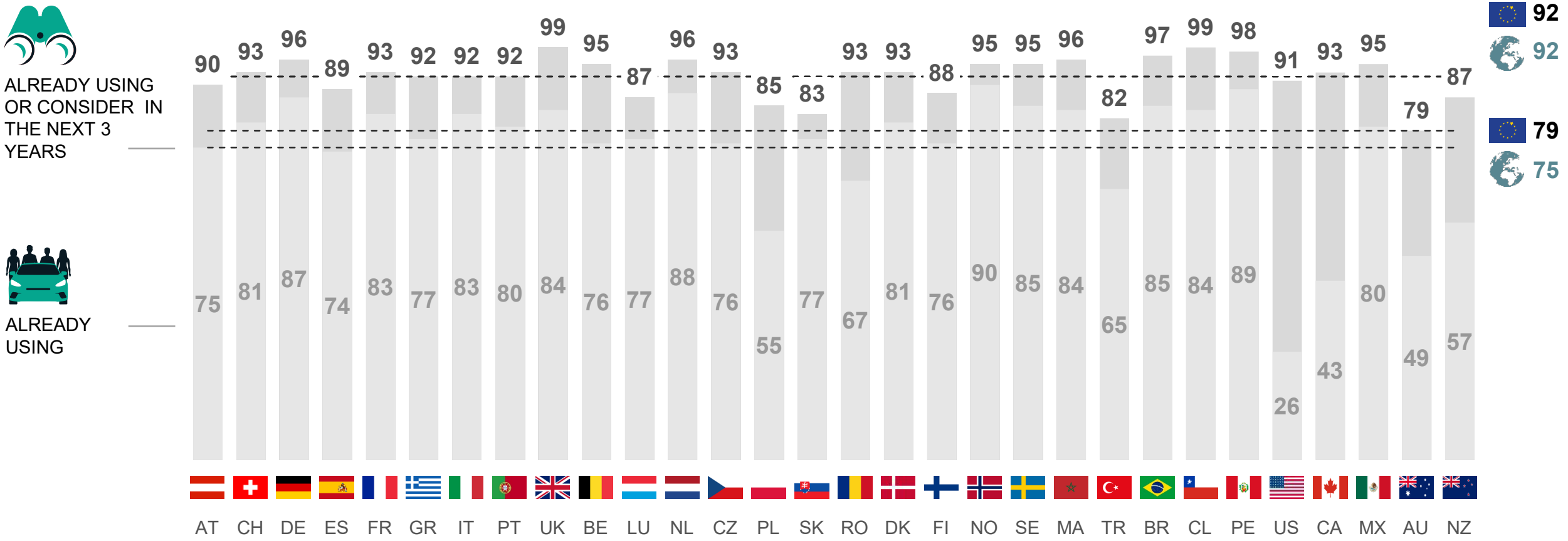
MOBILITY SOLUTIONS IMPLEMENTATION

At least one already implemented

List of the alternative mobility solutions:

- CORPORATE CAR SHARING
- 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 %



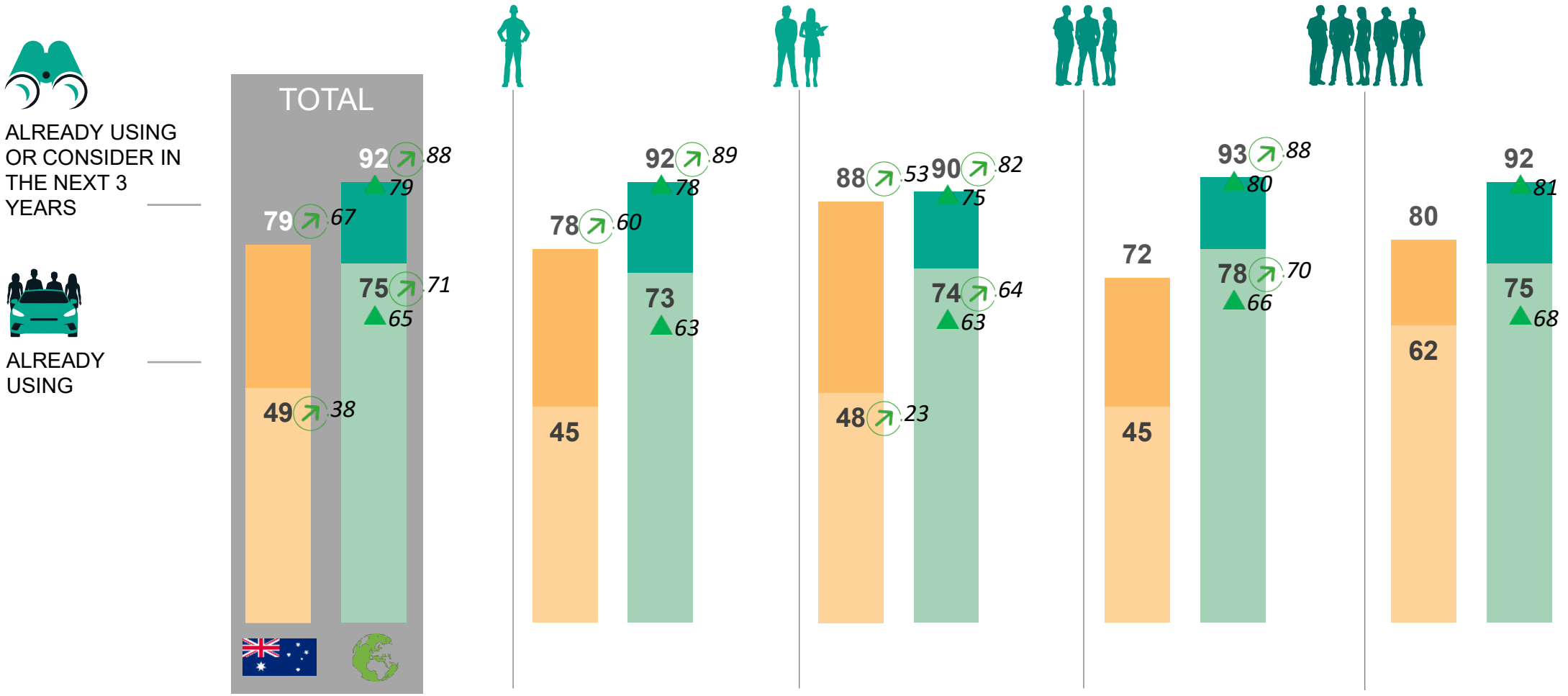
Which of the following have you implemented, or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions

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MOBILITY SOLUTIONS IMPLEMENTATION

At least one already implemented

In %



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

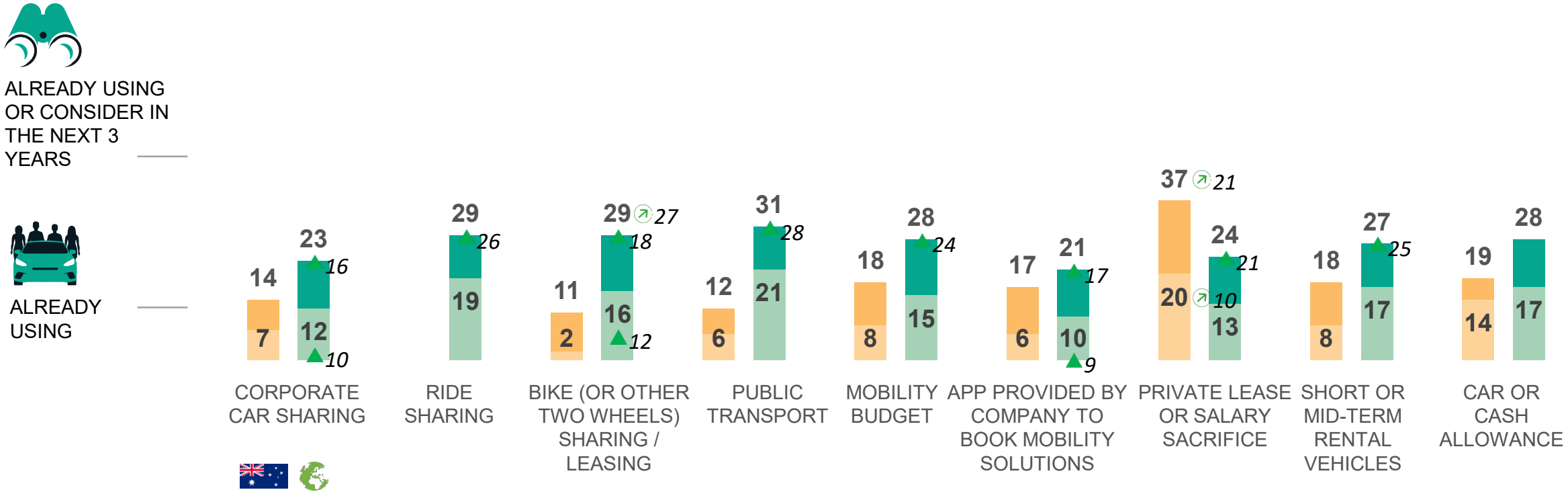
XX = score 2023 or 2022

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 %

49% Of companies have already implemented at least one of these solutions



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

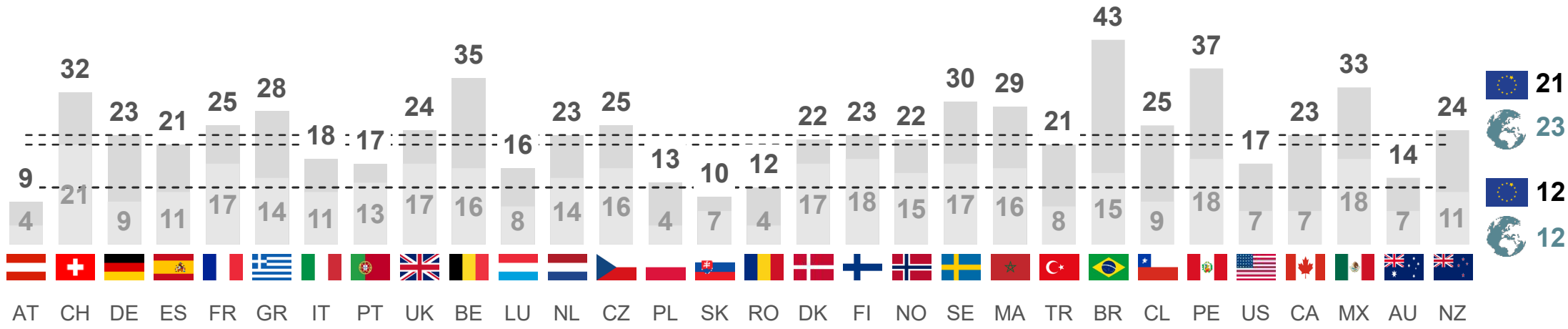
Arval Mobility Observatory
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ELEMENT-ARVAL GLOBAL ALLIANCE

CORPORATE CAR SHARING IMPLEMENTATION

In %

ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS

ALREADY USING

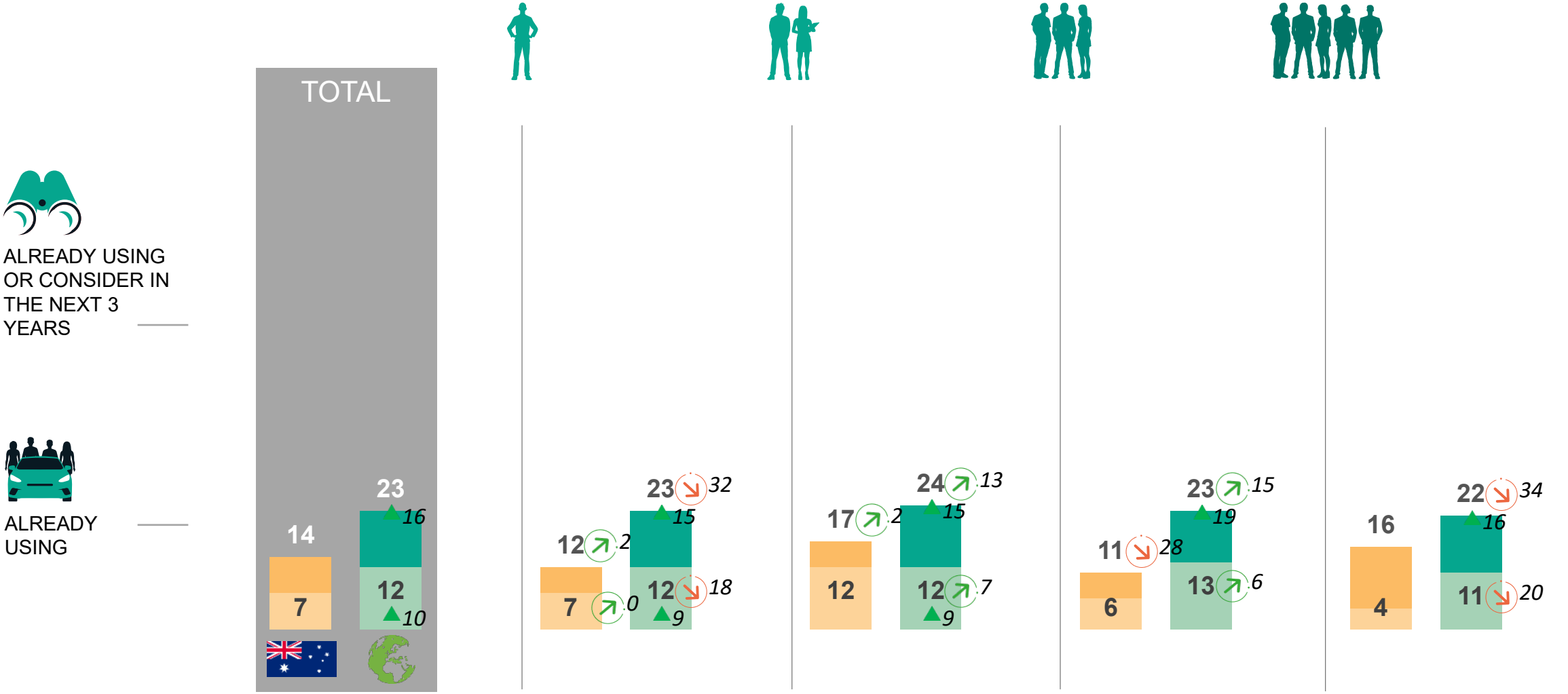


Which of the following have you implemented or will you implement in the next 3 years?
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Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions

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CORPORATE CAR SHARING IMPLEMENTATION

In %

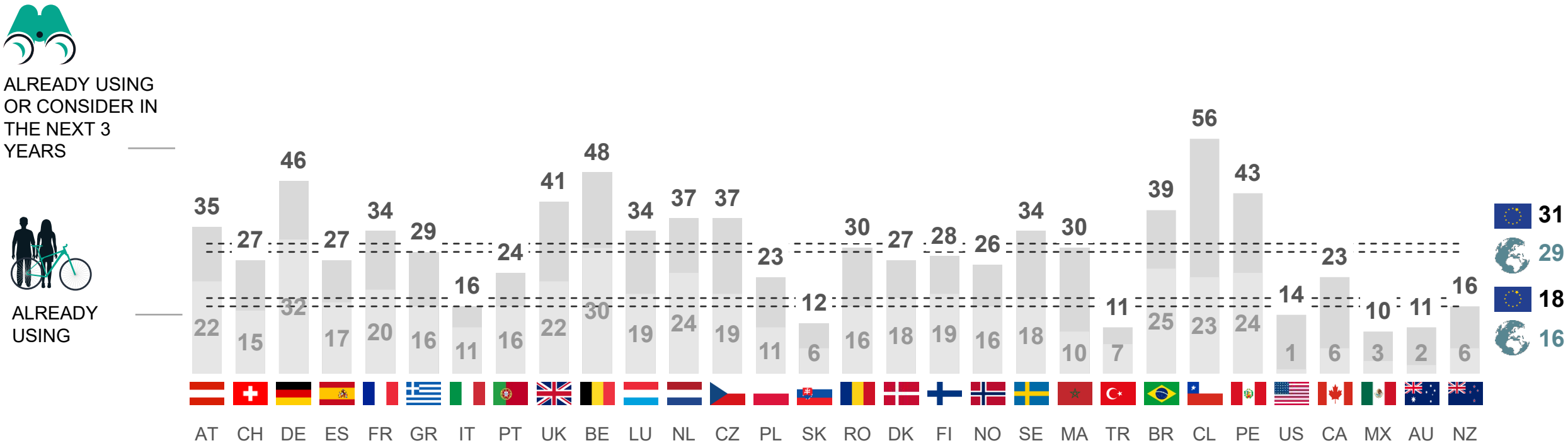


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Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions

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BIKE (OR OTHER TWO WHEELS) SHARING / LEASING IMPLEMENTATION

In %

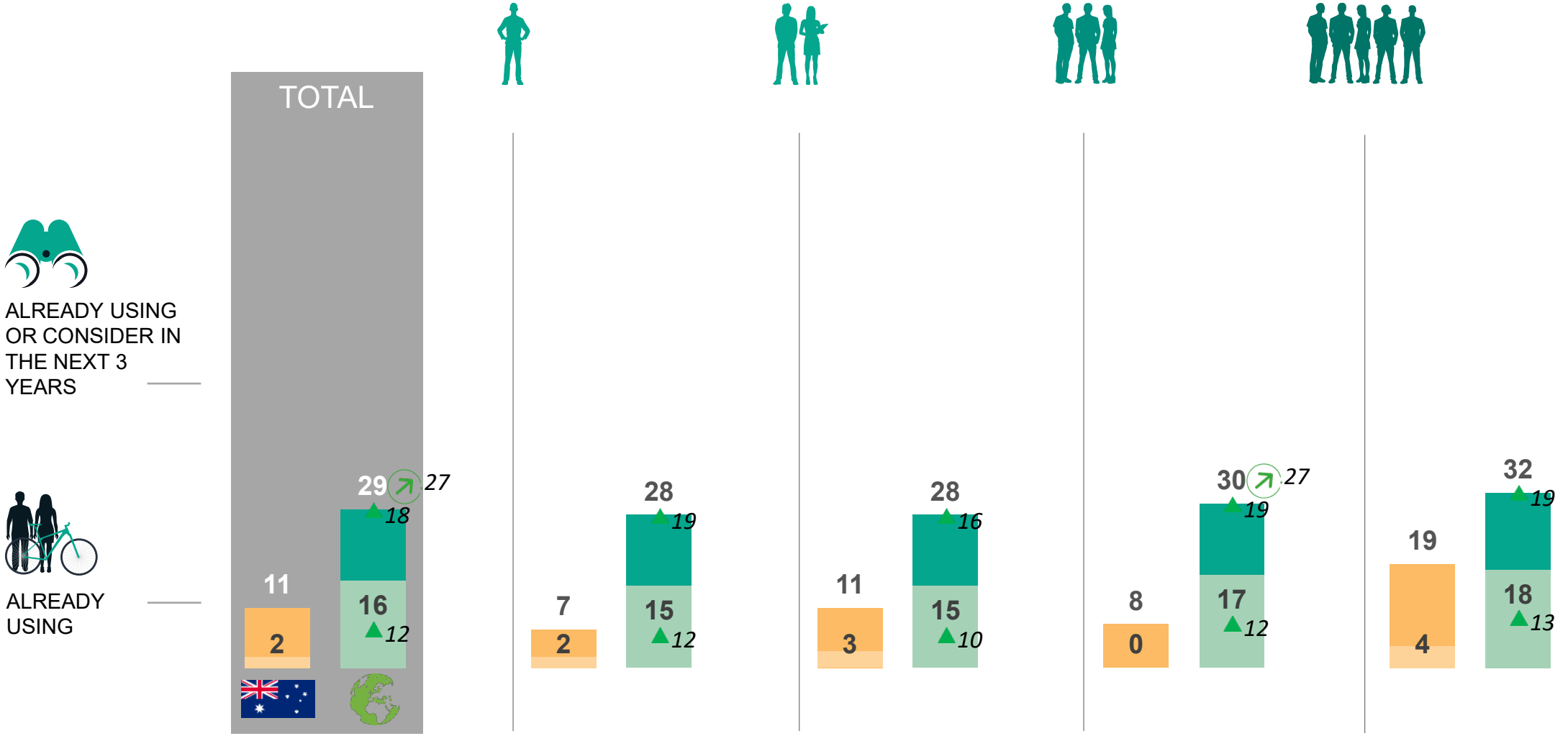


Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%

Question asked to respondents that are aware of mobility solutions

BIKE (OR OTHER TWO WHEELS) SHARING / LEASING IMPLEMENTATION

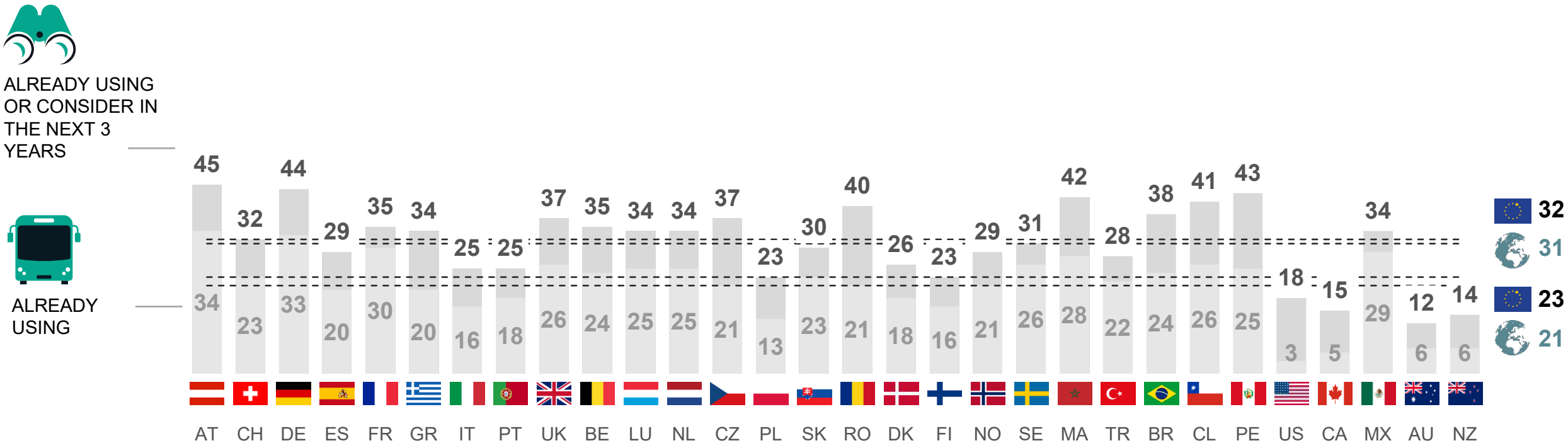
In %



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

PUBLIC TRANSPORT IMPLEMENTATION

In %

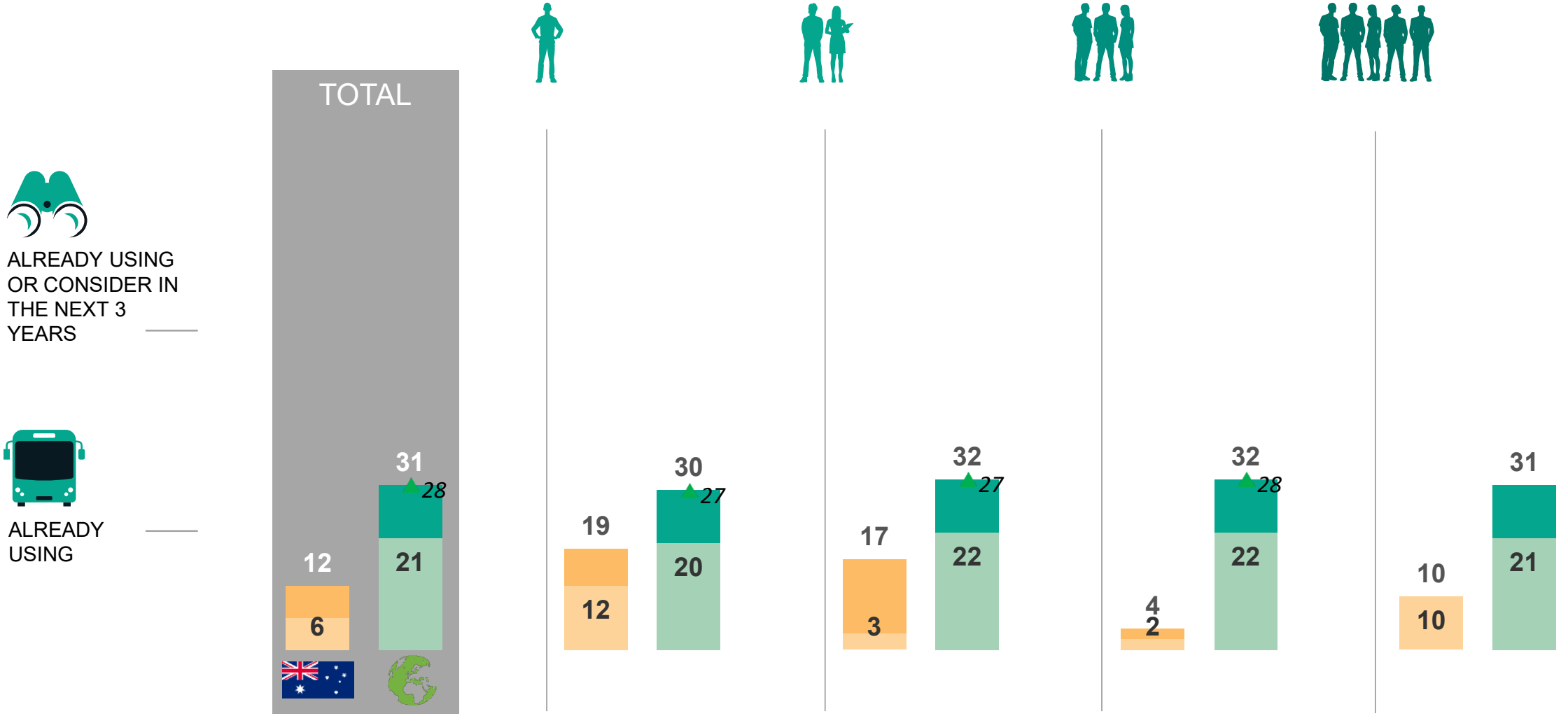


Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%

Question asked to respondents that are aware of mobility solutions

PUBLIC TRANSPORT IMPLEMENTATION

In %

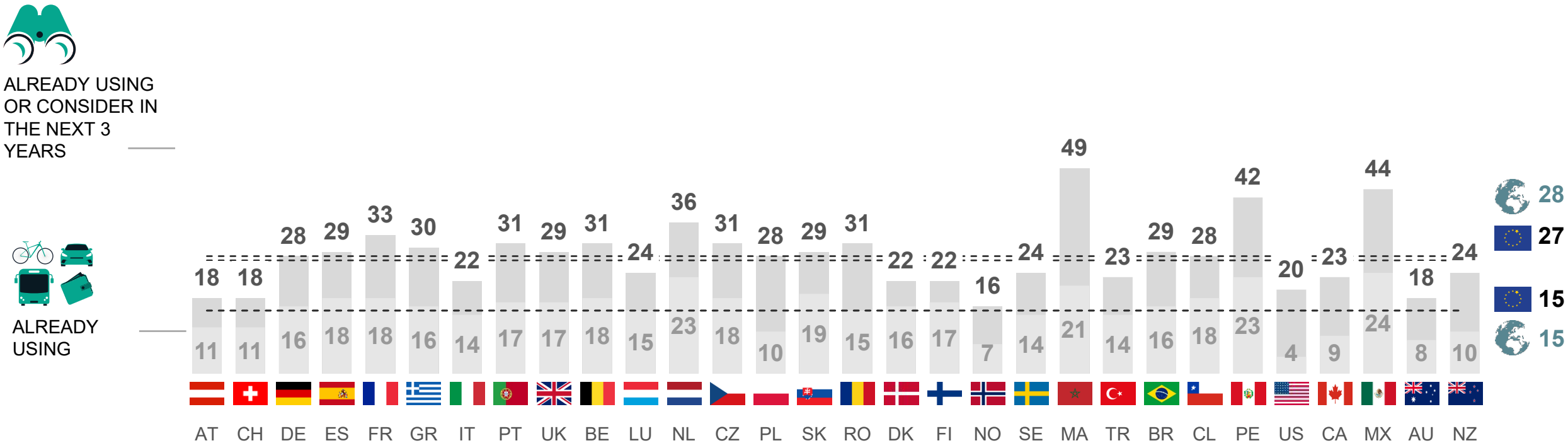


Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions

Arval Mobility Observatory
element | ARVAL BNP PARIBAS GROUP
ELEMENT-ARVAL GLOBAL ALLIANCE

MOBILITY BUDGET IMPLEMENTATION

In %

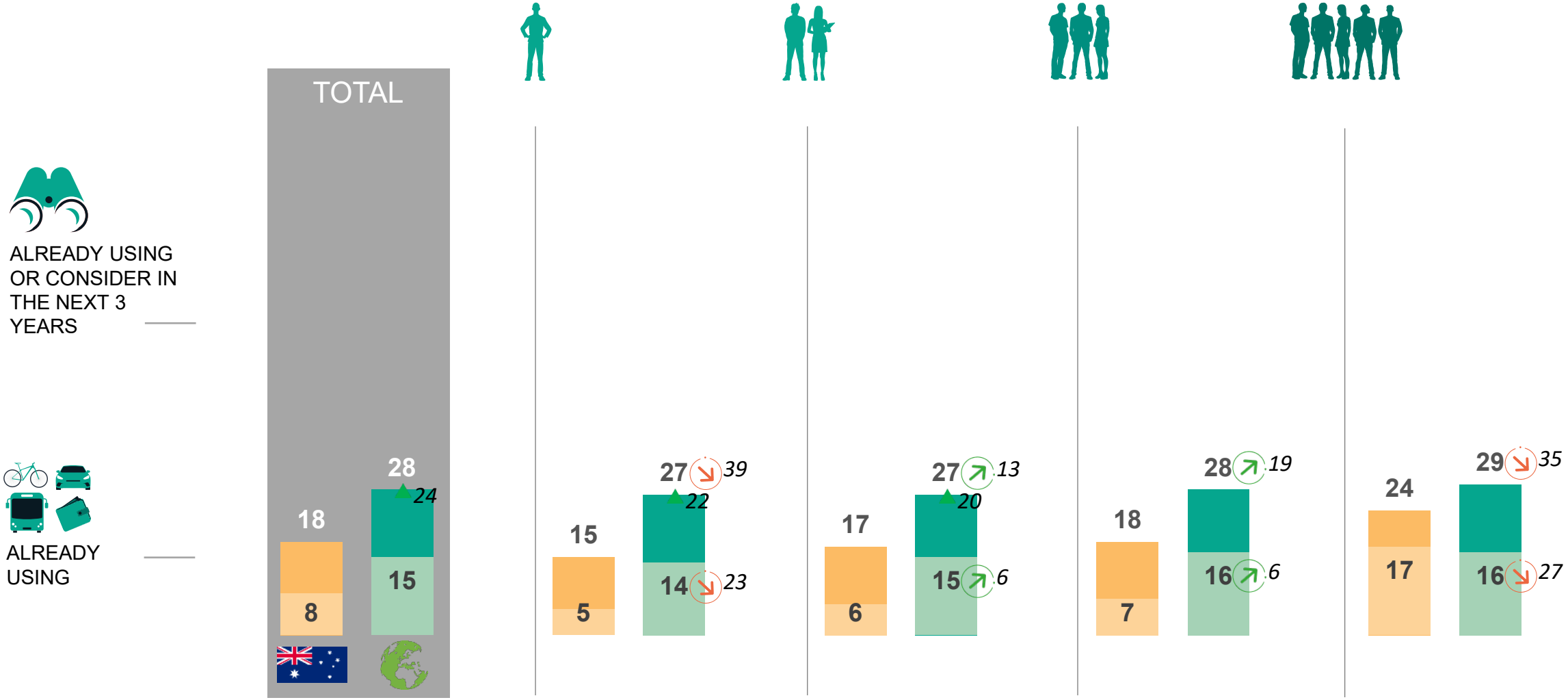


Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions

Arval Mobility Observatory
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ELEMENT-ARVAL GLOBAL ALLIANCE

MOBILITY BUDGET IMPLEMENTATION

In %



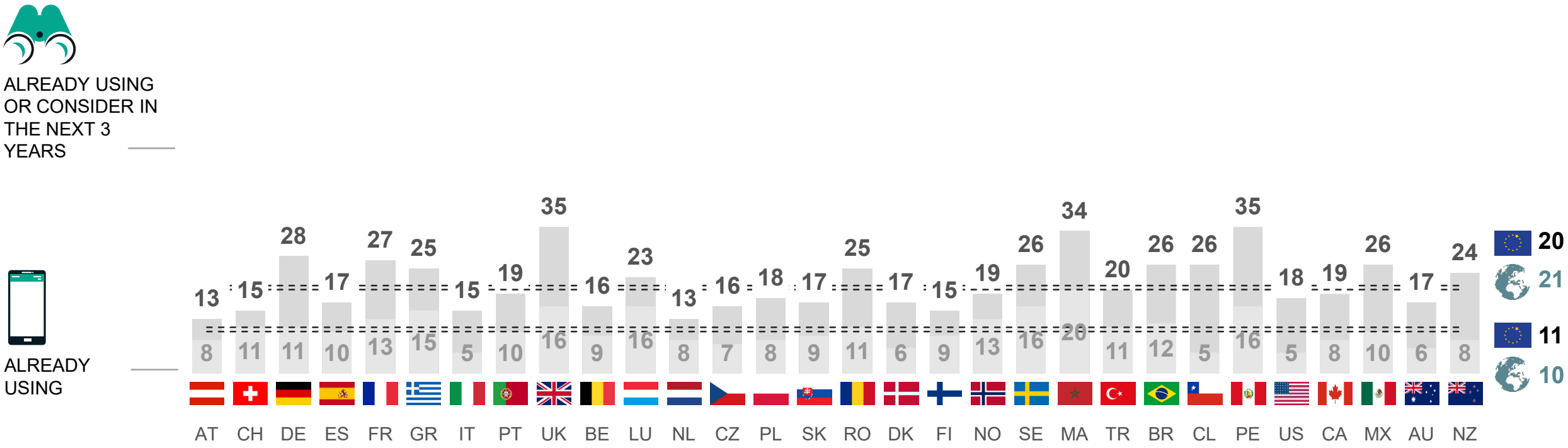
Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%

Question asked to respondents that are aware of mobility solutions

Arval Mobility Observatory
element | ARVAL BNP PARIBAS GROUP
ELEMENT-ARVAL GLOBAL ALLIANCE

AN APP PROVIDED BY THE COMPANY TO BOOK MOBILITY SOLUTIONS

In %

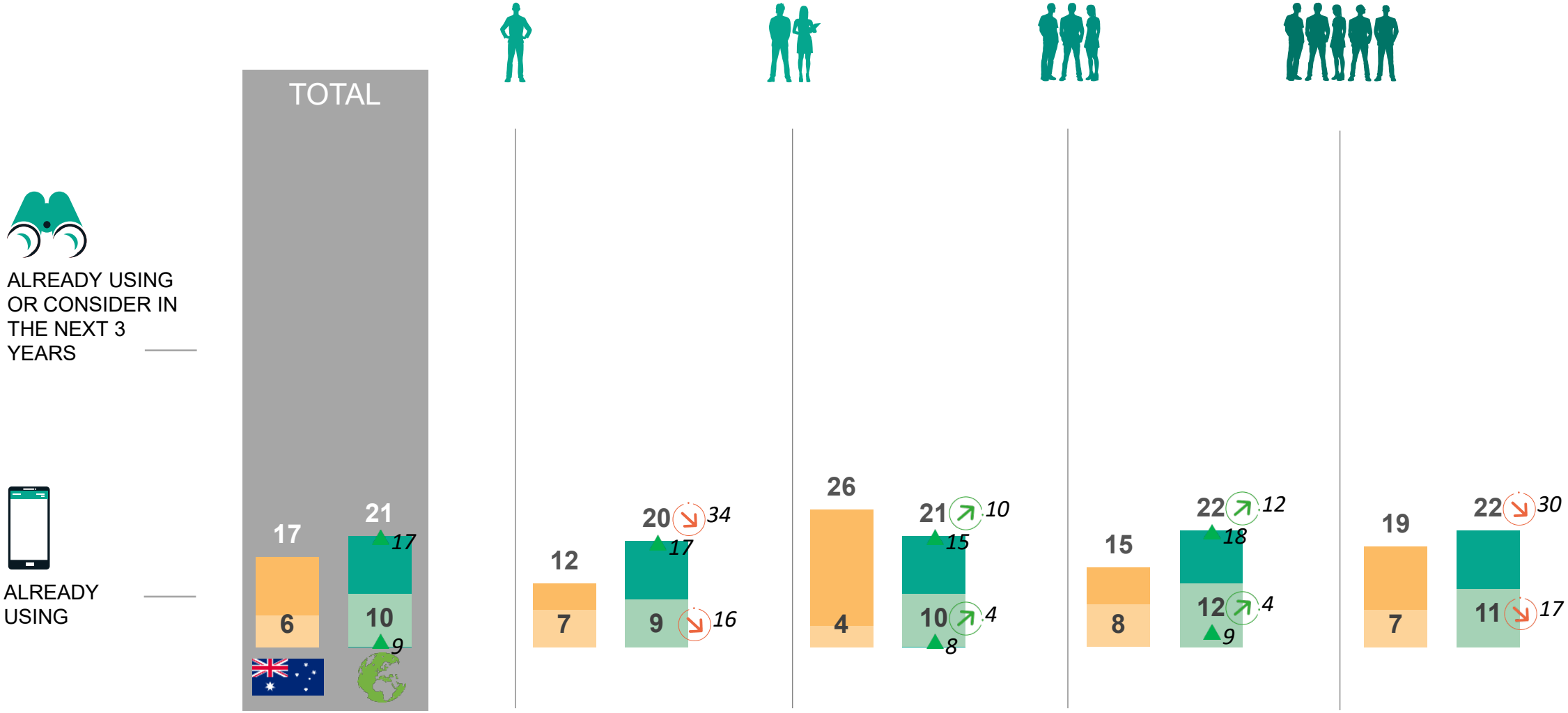


Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions

Arval Mobility Observatory
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ELEMENT-ARVAL GLOBAL ALLIANCE

AN APP PROVIDED BY THE COMPANY TO BOOK MOBILITY SOLUTIONS

In %

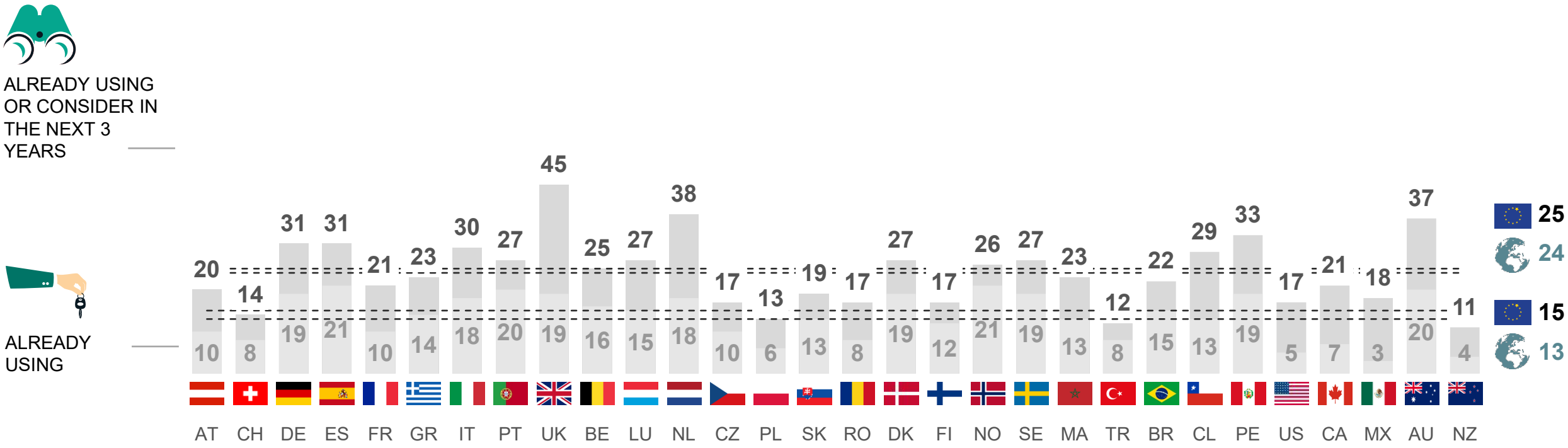


Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions

Arval Mobility Observatory
element | ARVAL BNP PARIBAS GROUP
ELEMENT-ARVAL GLOBAL ALLIANCE

PRIVATE LEASE OR SALARY SACRIFICE IMPLEMENTATION

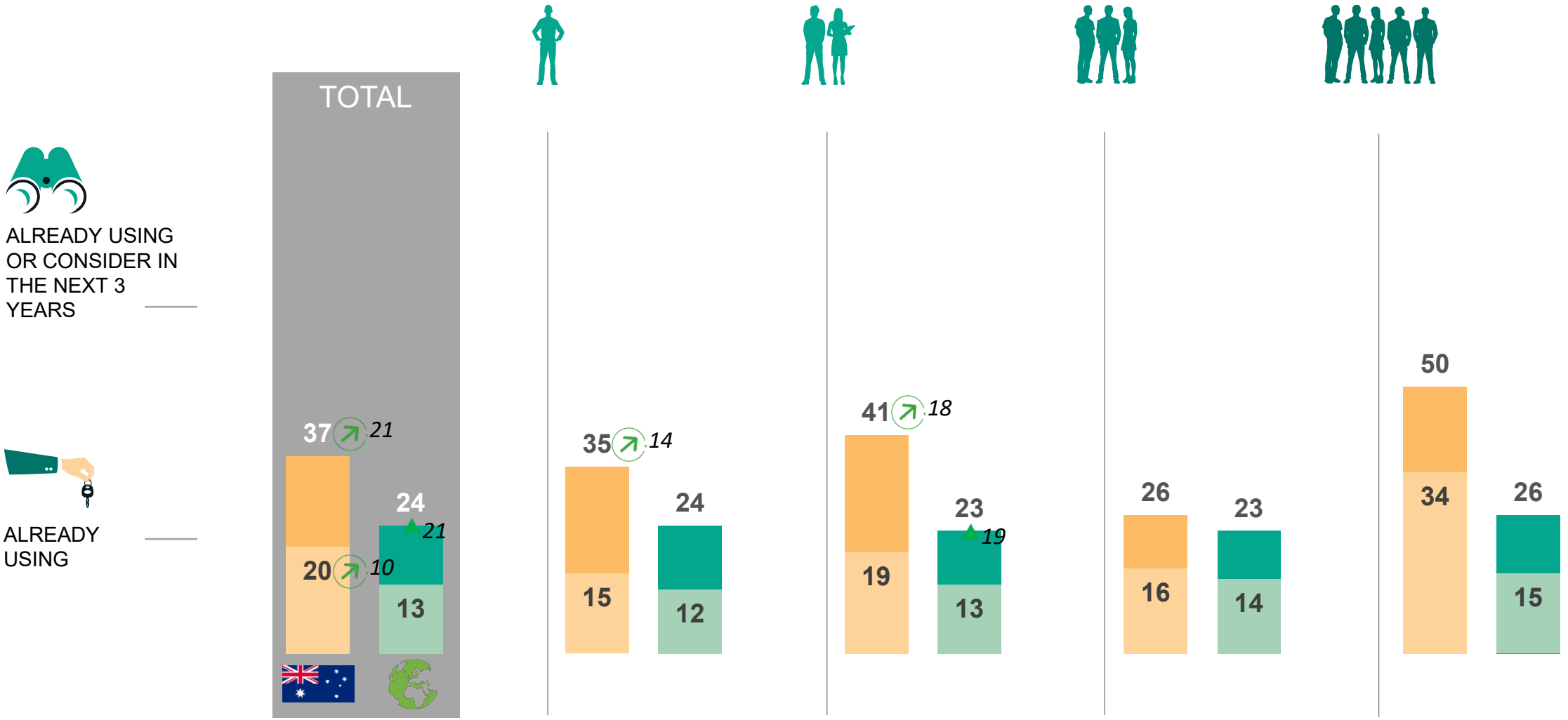
In %



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

PRIVATE LEASE OR SALARY SACRIFICE IMPLEMENTATION

In %



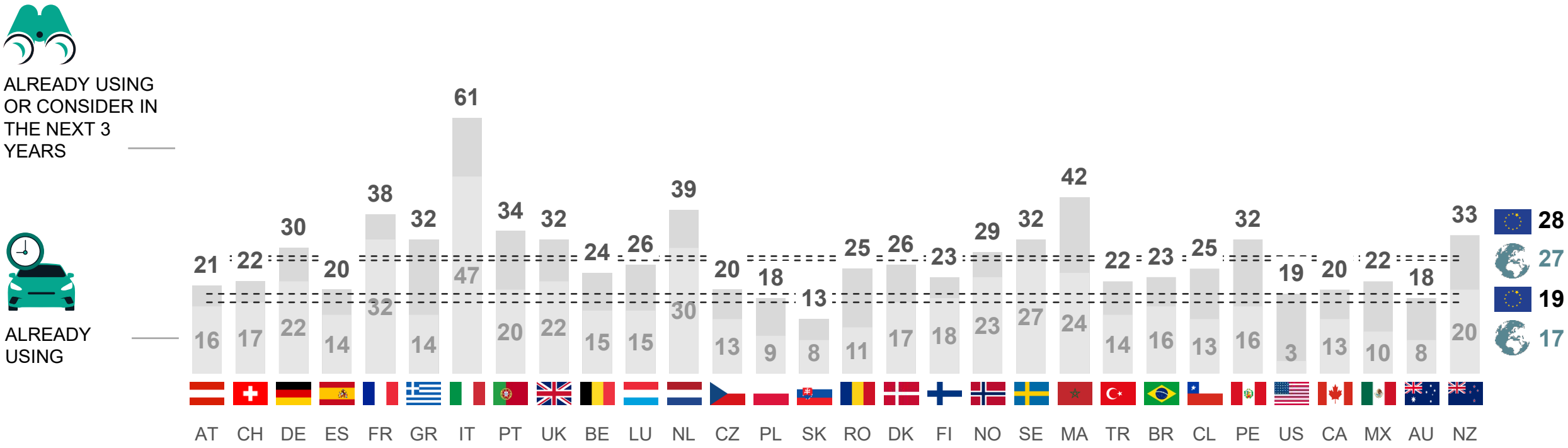
Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%

Question asked to respondents that are aware of mobility solutions

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SHORT OR MID-TERM RENTAL VEHICLES IMPLEMENTATION

In %

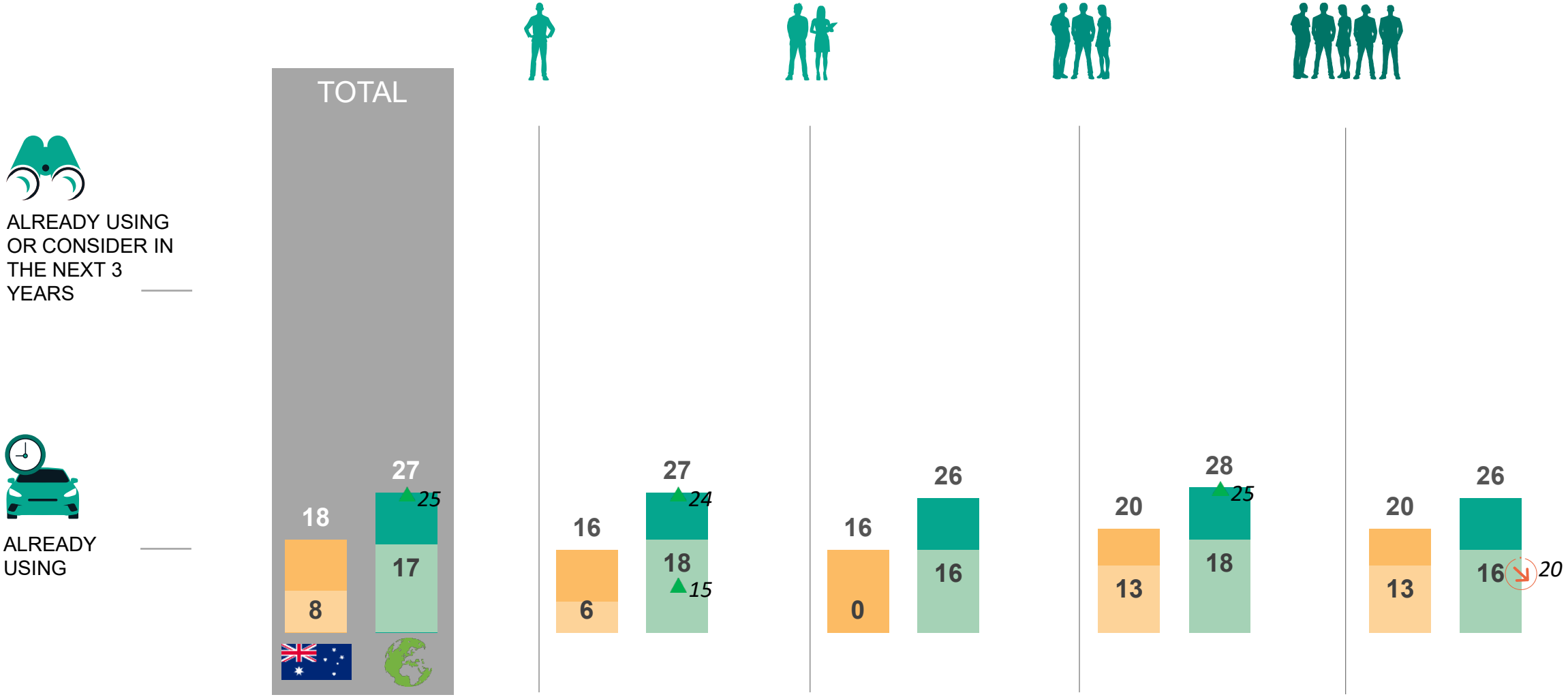


Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%

Question asked to respondents that are aware of mobility solutions

SHORT OR MID-TERM RENTAL VEHICLES IMPLEMENTATION

In %



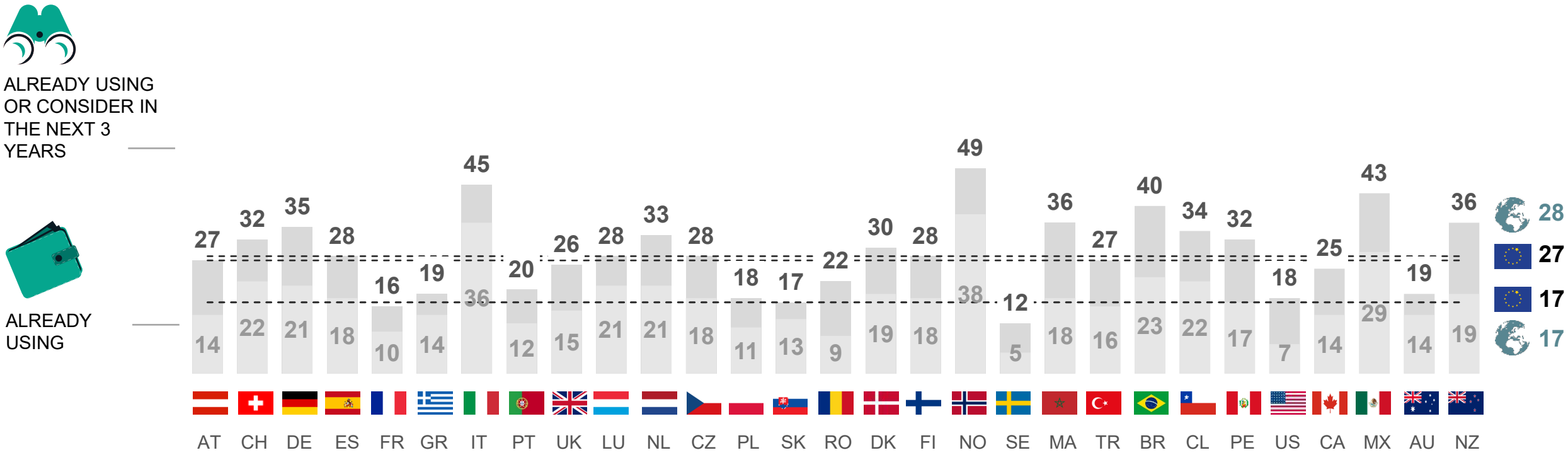
Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%

Question asked to respondents that are aware of mobility solutions

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CAR OR CASH ALLOWANCE IMPLEMENTATION

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%

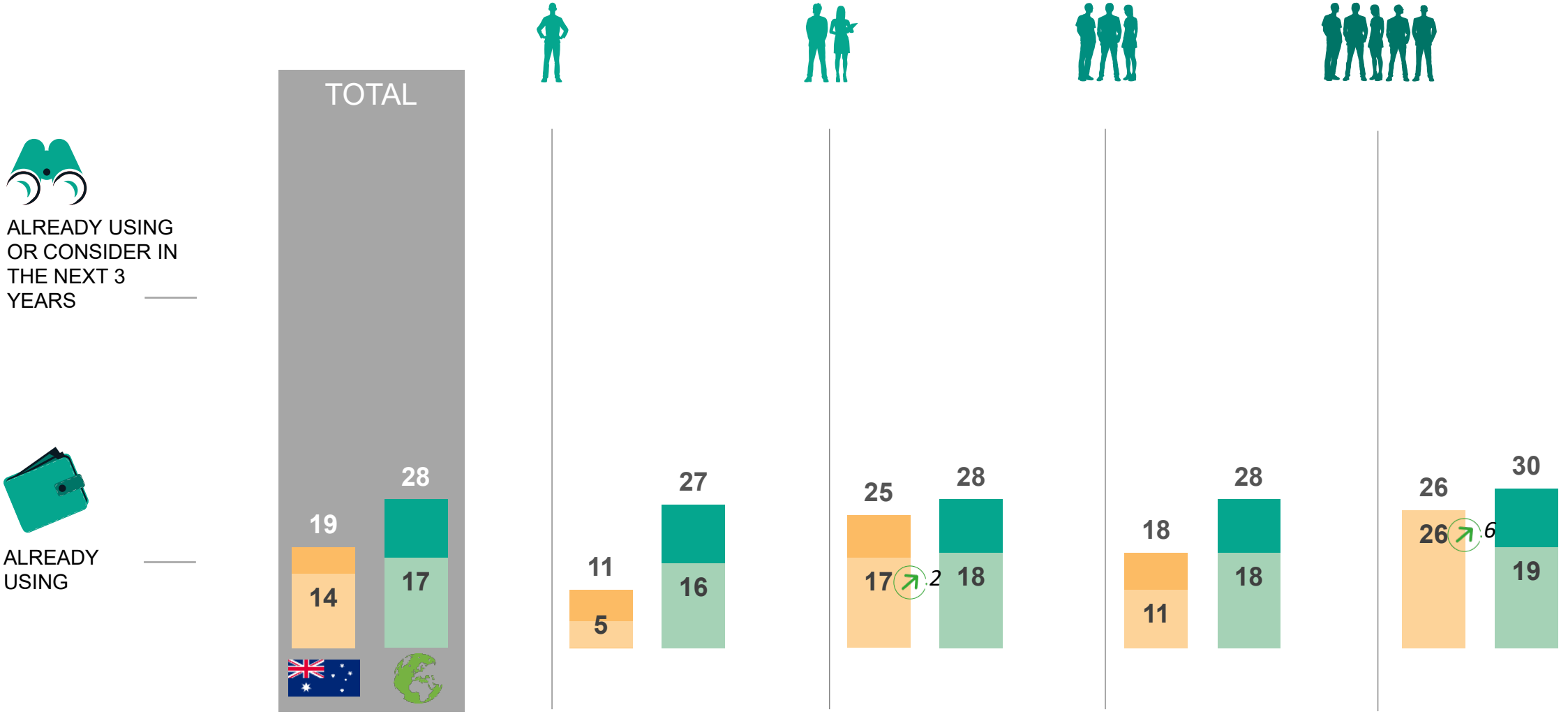
Question asked to respondents that are aware of mobility solutions

Arval Mobility Observatory

element | ARVAL BNP PARIBAS GROUP
ELEMENT-ARVAL GLOBAL ALLIANCE

CAR OR CASH ALLOWANCE IMPLEMENTATION

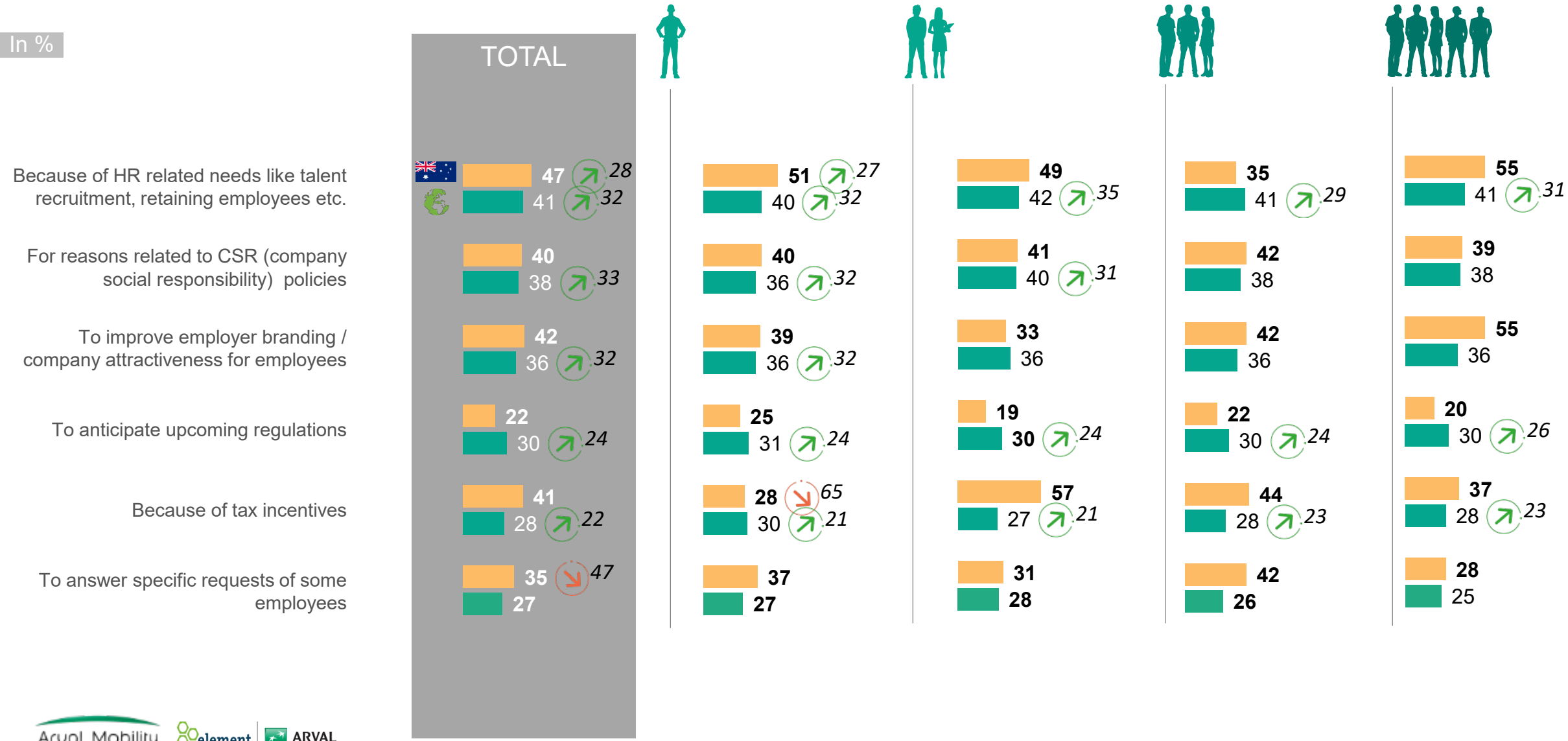
In %



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

REASONS FOR IMPLEMENTING OR CONSIDERING MOBILITY SOLUTIONS

In %



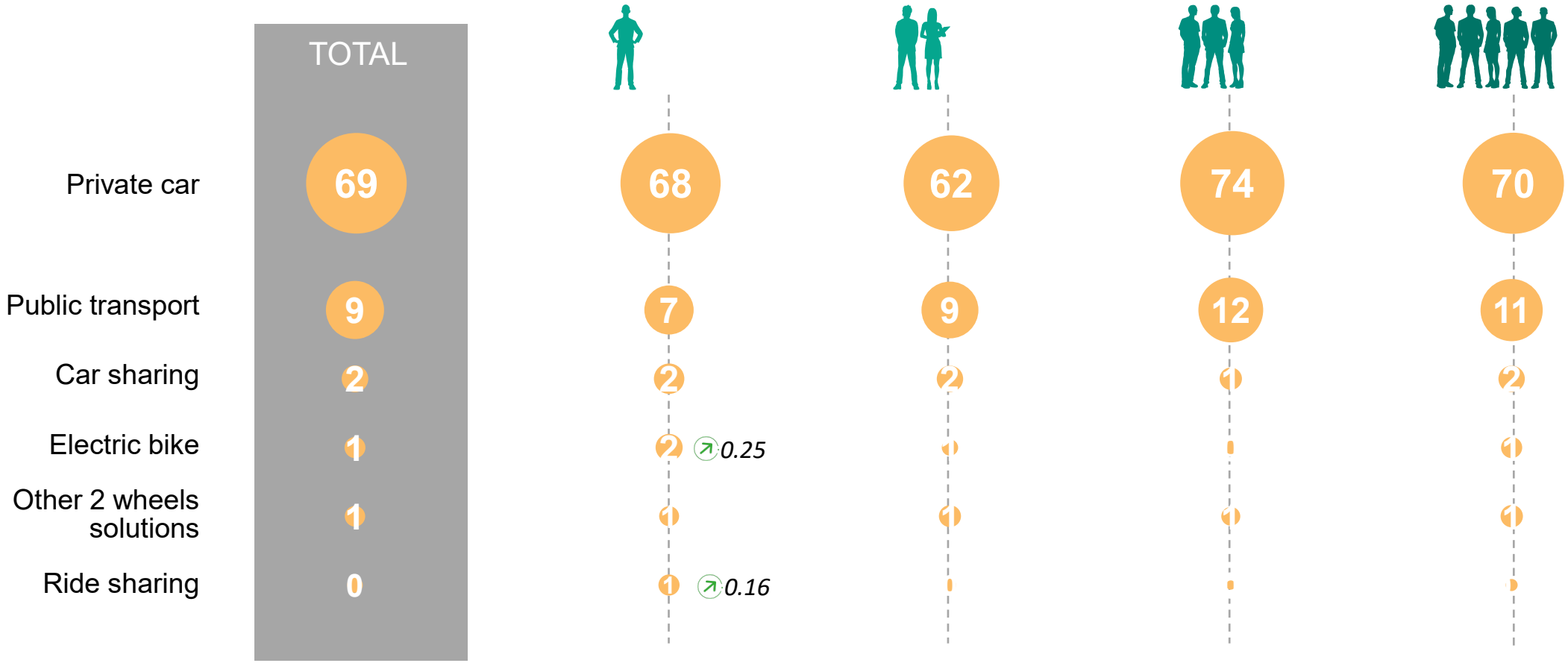
For what reasons has your company introduced or intends to introduce these mobility solutions?
Basis: companies introduced or intend to introduce at least one new mobility solution
Question asked to respondents that are aware of mobility solutions

MEANS OF COMMUTING TO WORK

HOW TO READ THE RESULTS?

In Australia, companies claim that on average, 69.23% of employees use private car to commute to the workplace

In %

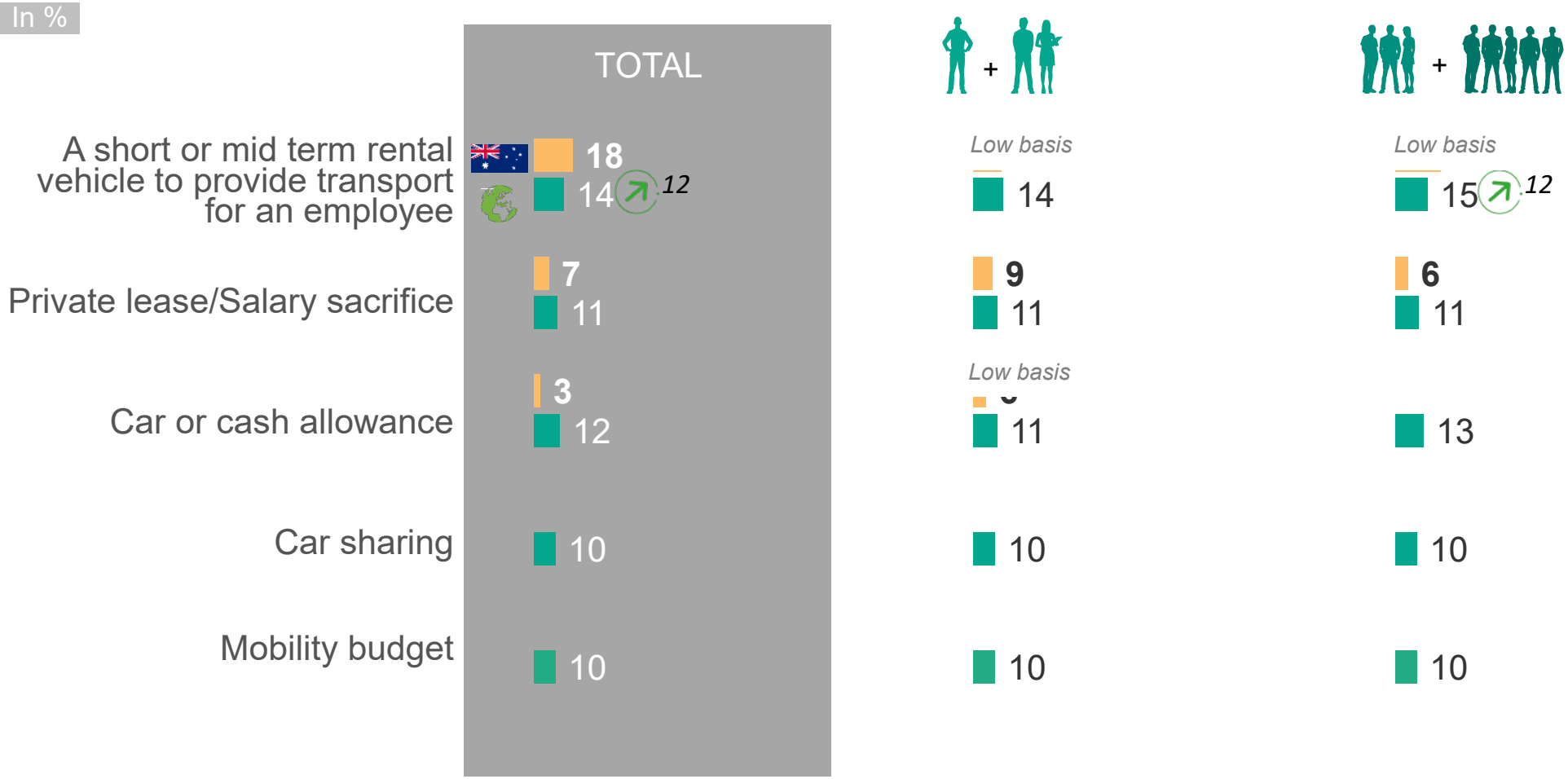


What percentage of your employees use each of the following means of transportation to go to the workplace ?
Basis: companies with corporate vehicles = 100%

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

Certainly

In %

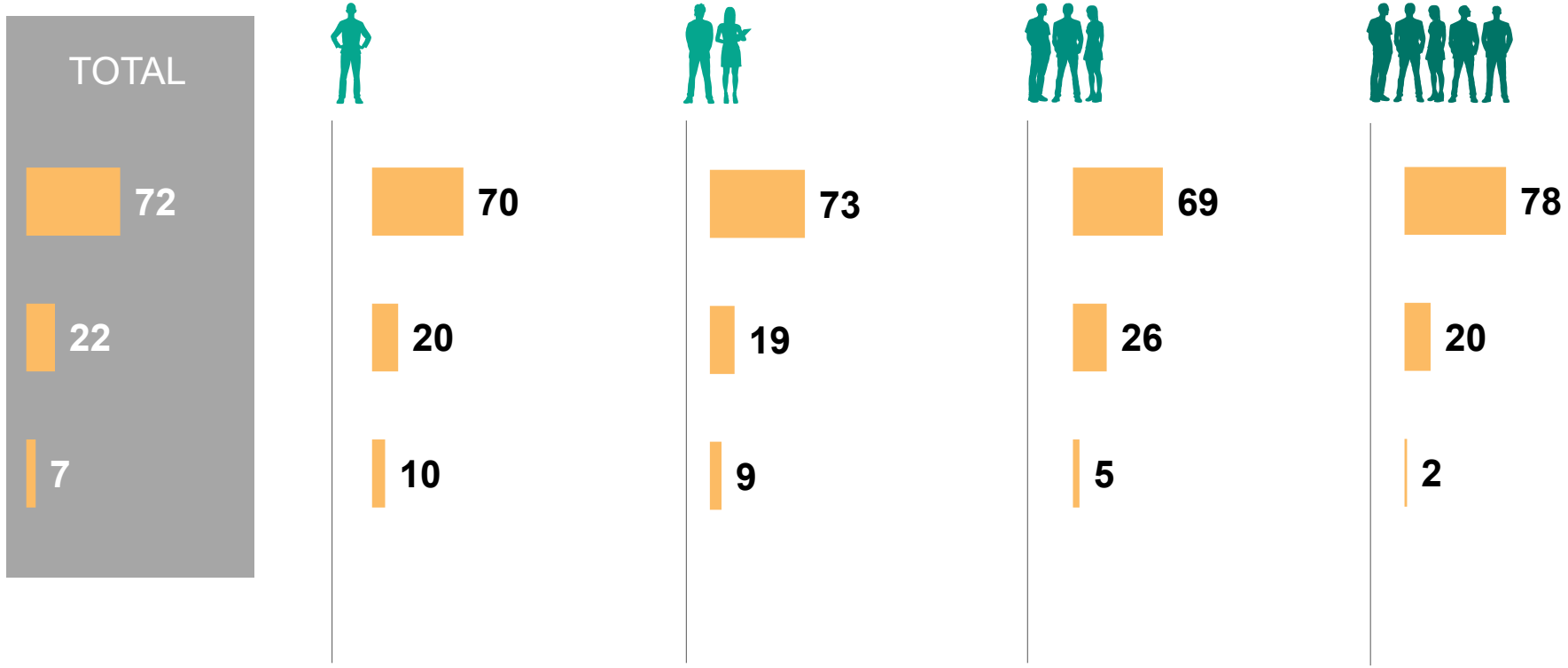


Would you anticipate that your company would give up all or part of the company car fleet for such alternatives?
Basis: companies using or considering at least one mobility solution
Question asked to respondents that are aware of mobility solutions

MAIN REASON TO PROVIDE COMPANY CARS TO EMPLOYEES

In %

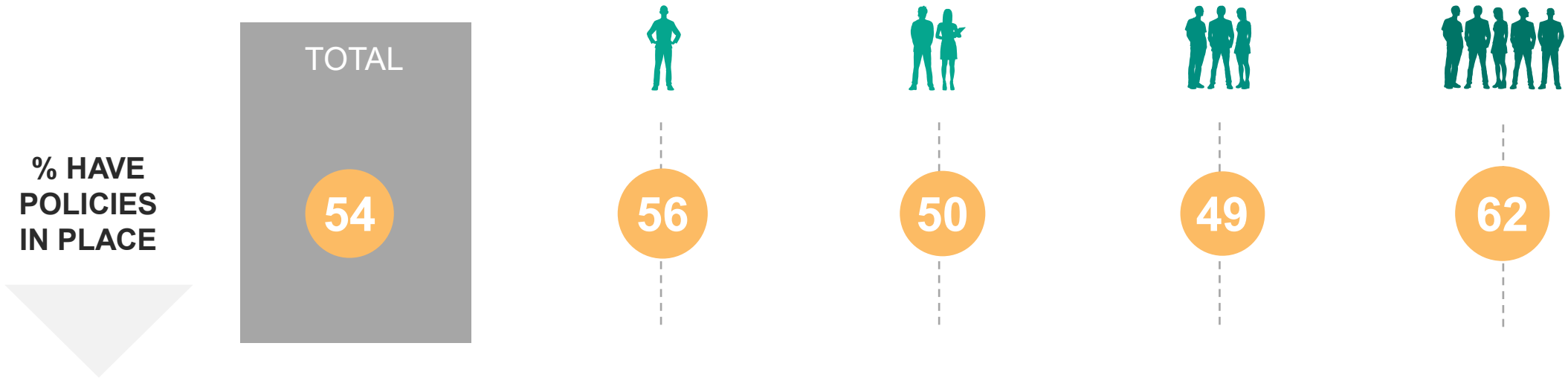
Passenger cars



What is the main reason why you provide company cars to your employees?
Basis: companies with passenger cars

POLICIES FOR PERSONAL CARS USED ON BUSINESS

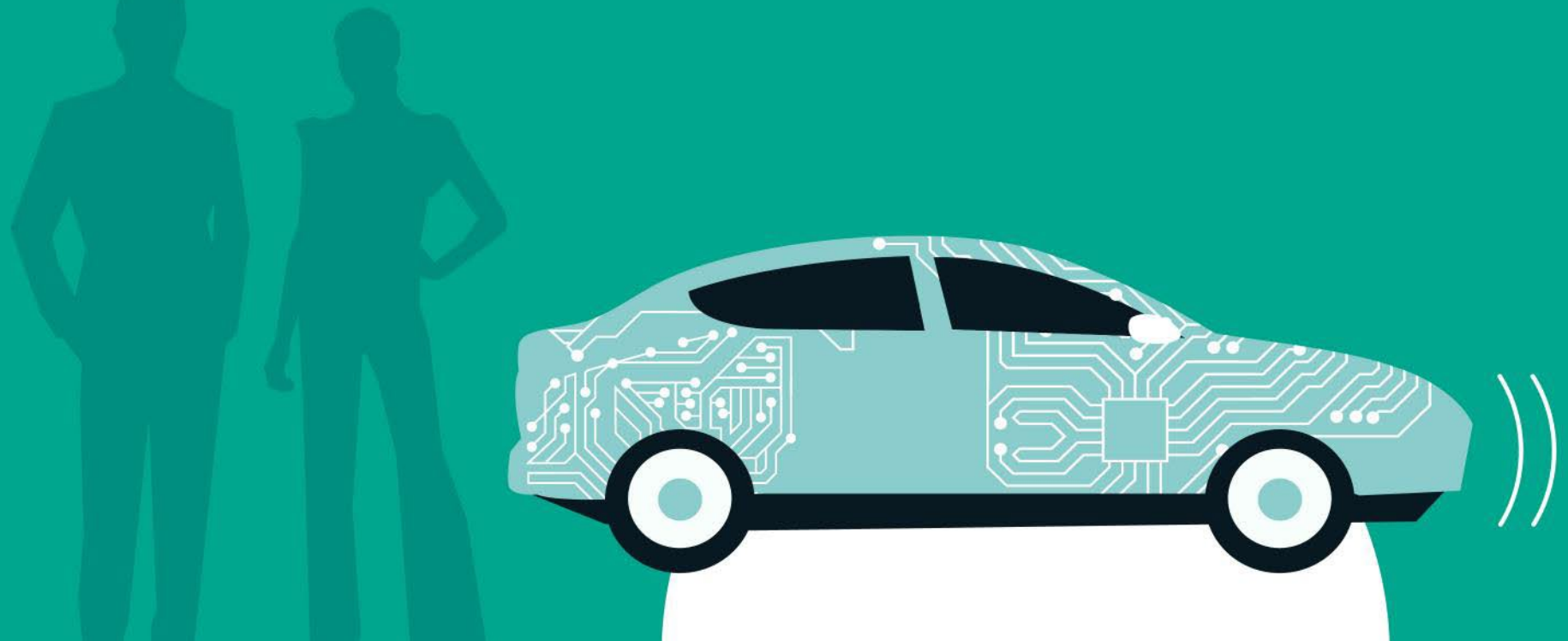
In %



Do you have policies in place for cars that are owned by employees but used on business?
Basis: companies with corporate vehicles = 100%

7

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

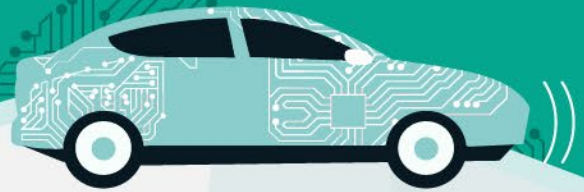


CONNECTED VEHICLES AND TELEMATICS DATA USAGE IN LINE WITH GLOBAL TREND

1. In line with the global picture, **4 out of 10 Australian companies use connected vehicles within their fleet**, with no differences between passenger cars and LCVs.

2. **Among them, 6 out of 10 companies are already using or consider using the data coming from the vehicle box thanks to a telematics platform** in the next 3 years but only a few are currently using the data – in line with the global picture.

CONNECTED VEHICLES



USE OF CONNECTED VEHICLES

41%

40%



USE OF TELEMATICS DATA

Already using

12%

16%

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

All vehicles

In %

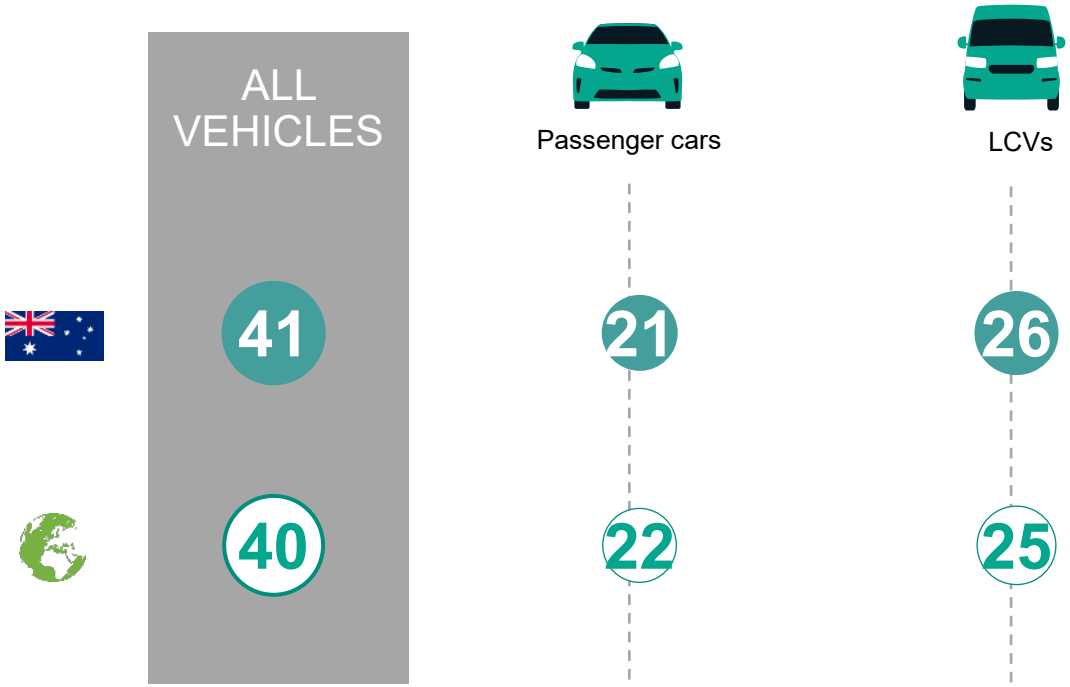
Passenger cars + LCVs

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

HOW TO READ THE RESULTS ?

41% of companies with fleet using connected vehicles for all or part of their fleet.

21% use connected vehicles for passenger cars, while 26% 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

Is your fleet connected thanks to a telematic tool?
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Basis: companies with corporate passenger cars / companies with corporate LCVs

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

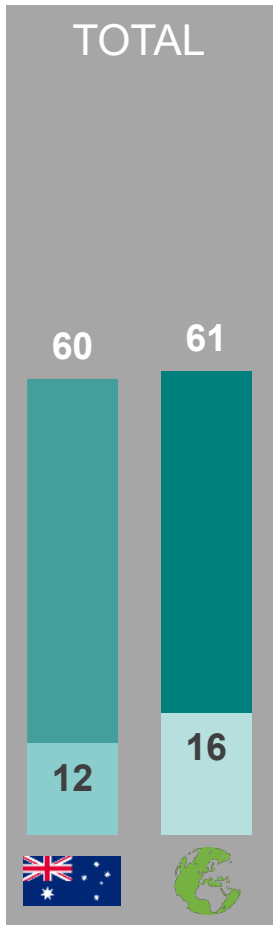
All vehicles

In %

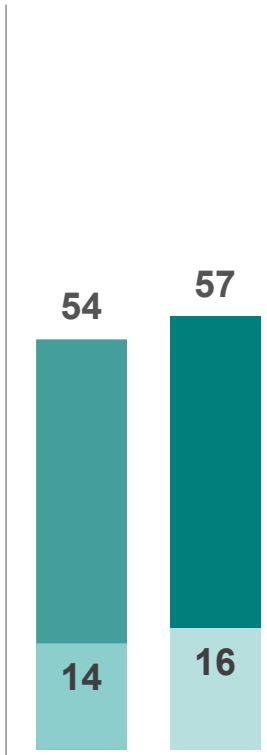
Passenger cars + LCVs

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



Passenger cars



LCVs



HOW TO READ THE RESULTS ?

60% 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.
16% 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

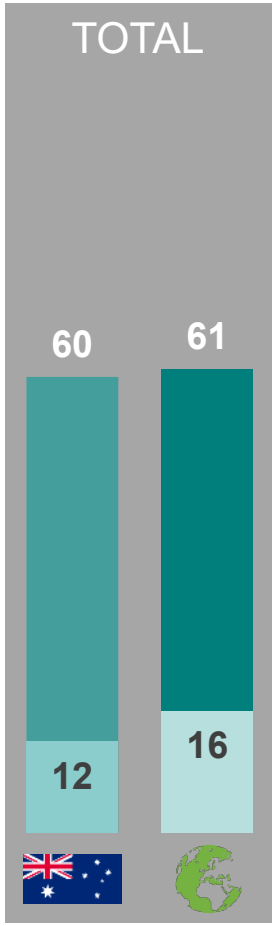
All vehicles

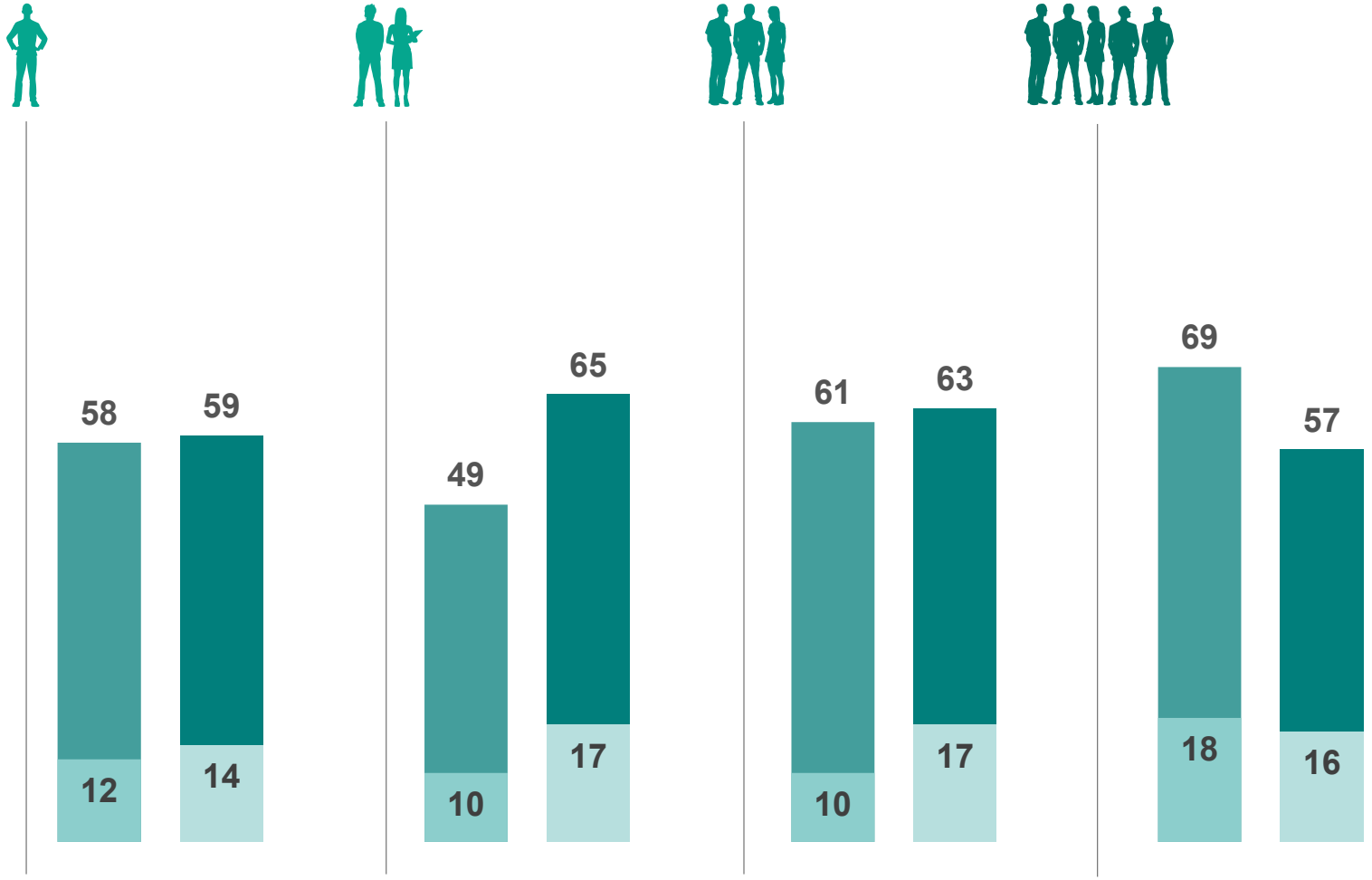
In %

Passenger cars + LCVs

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING





New question added in 2024

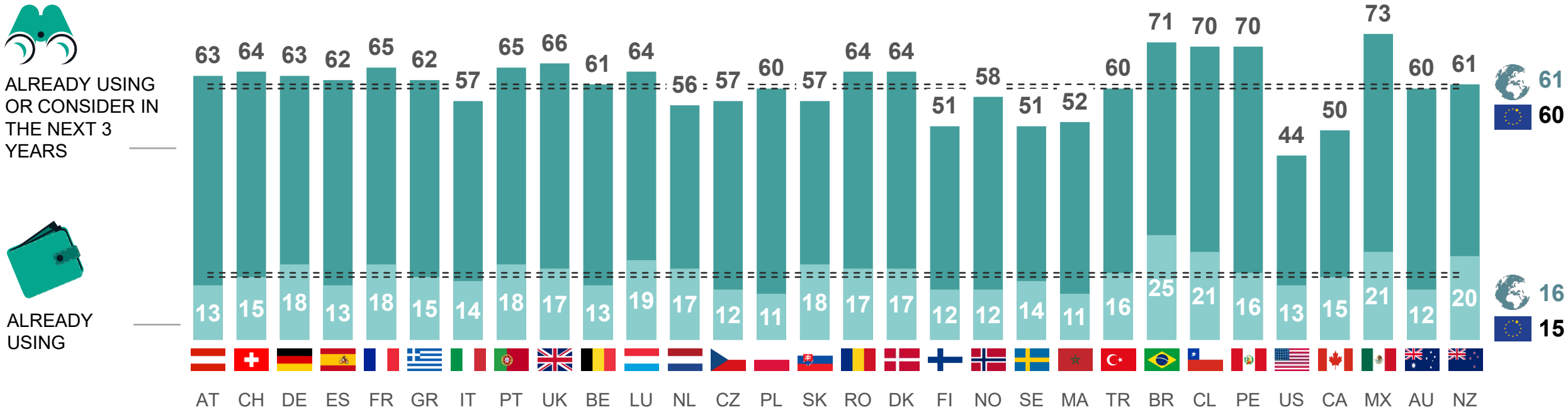
Do you use or consider using the data coming from the vehicle box thanks to a telematics platform ?
Basis: companies with a fleet using connected vehicles for all or part of their fleet.

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

All vehicles

In %

Passenger cars + LCVs



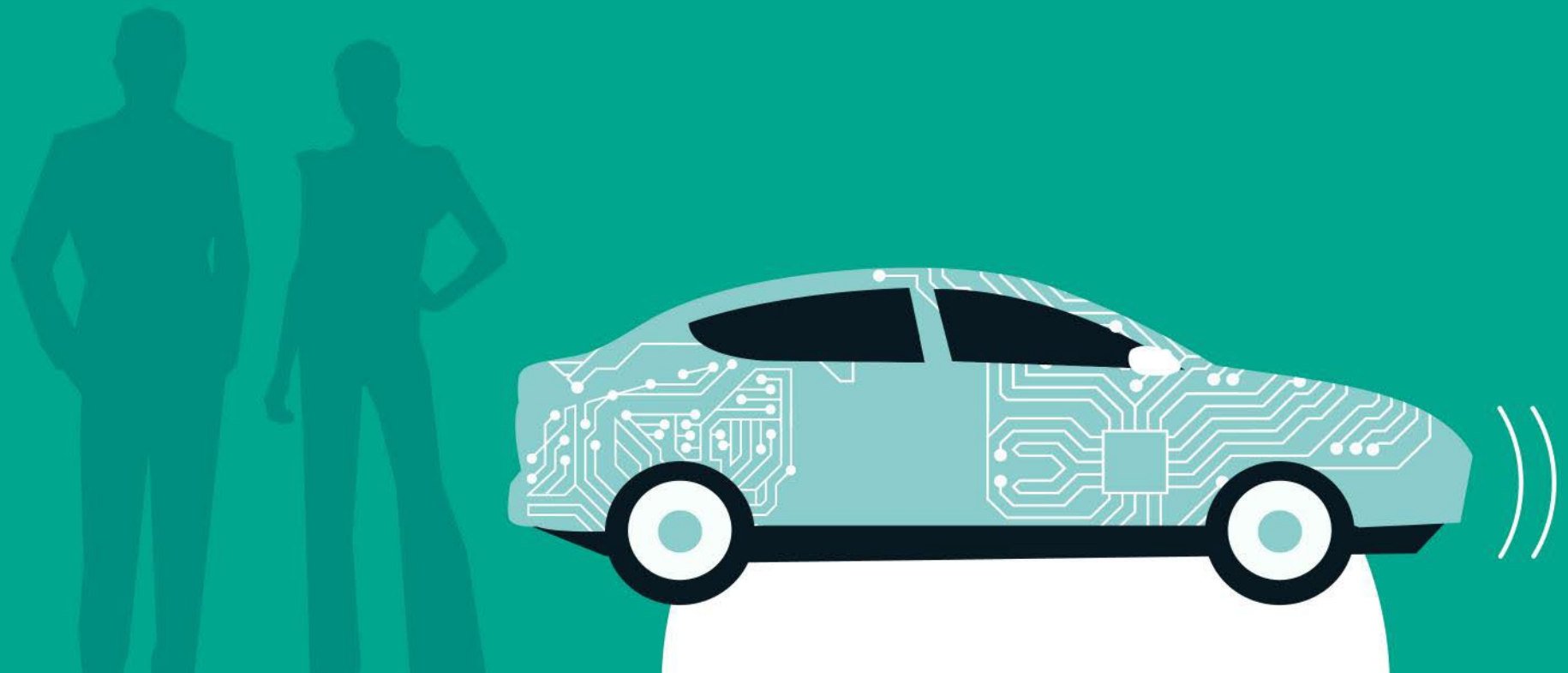
New question added in 2024

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



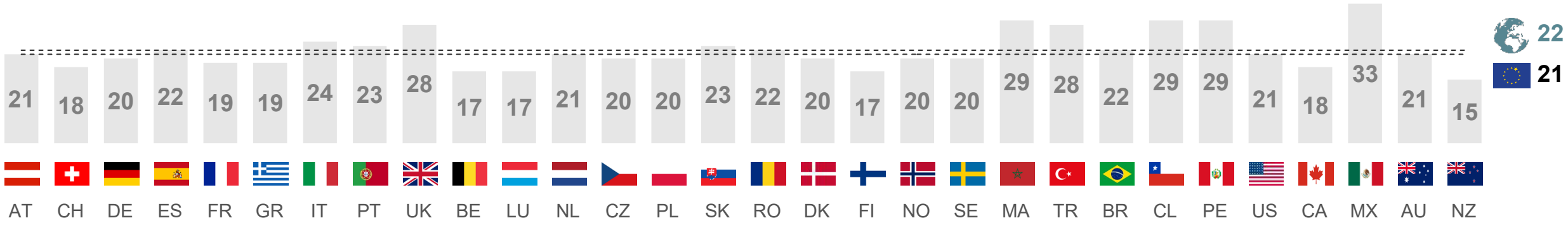
PROPORTION OF COMPANIES USING CONNECTED VEHICLES

Passenger cars

In %

Passenger cars

PROPORTION OF COMPANIES USING CONNECTED VEHICLES FOR THEIR PASSENGER CARS



Is your fleet connected thanks to a telematic tool?
Basis: companies with corporate passenger cars

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

Passenger cars

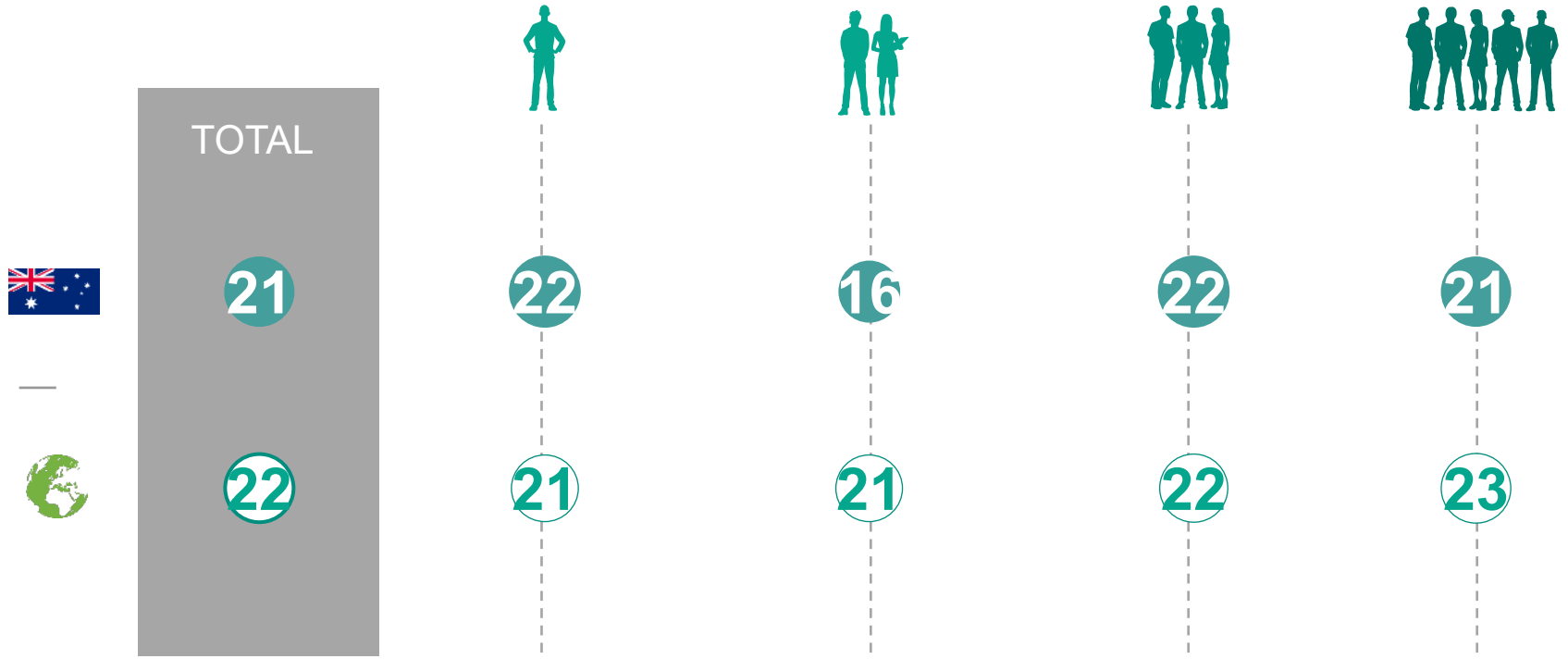
In %

Passenger cars

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

HOW TO READ THE RESULTS ?

21% 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

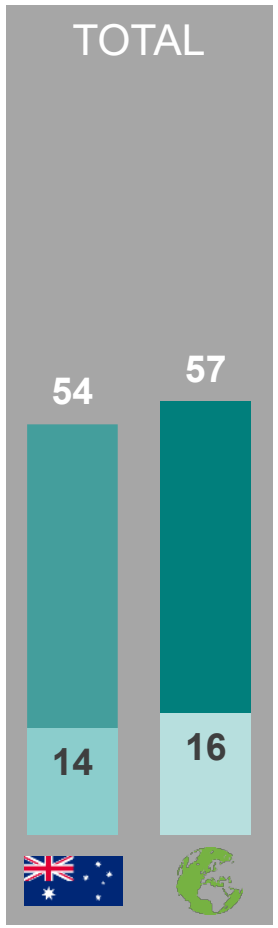
Passenger cars

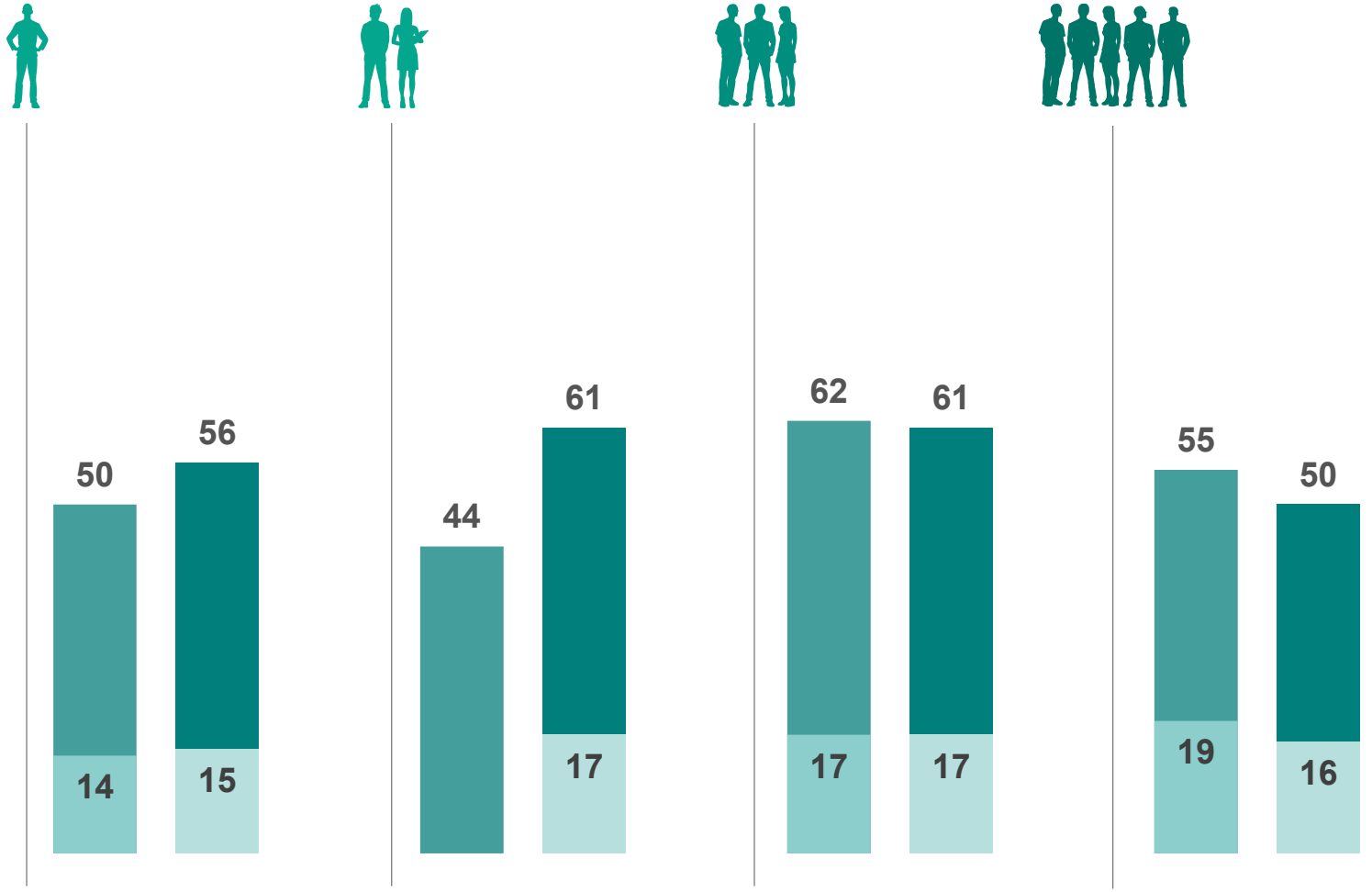
In %

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.

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

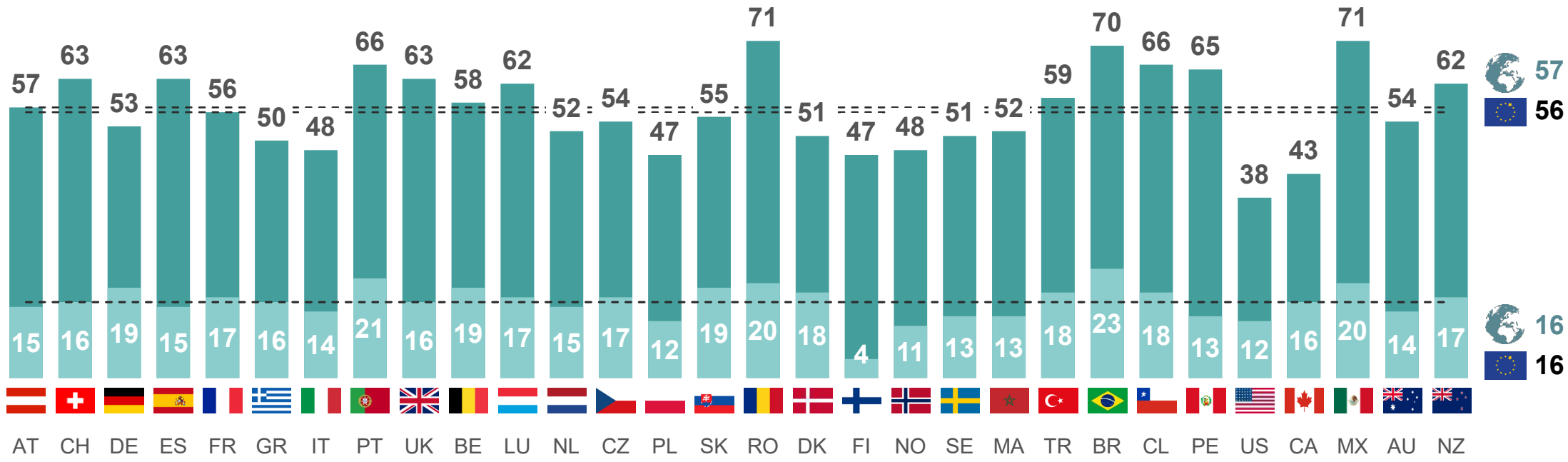
Passenger cars

In %

Passenger cars

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



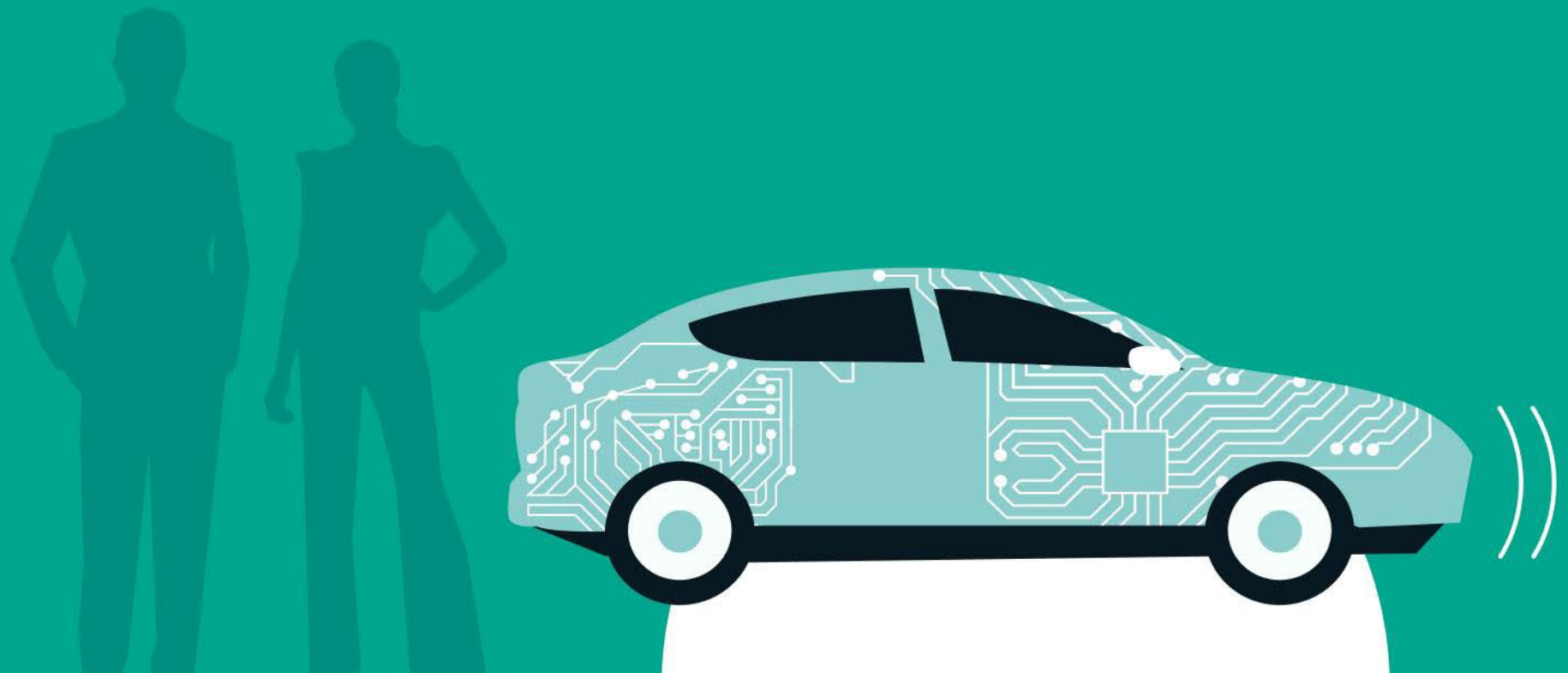
New question added in 2024

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



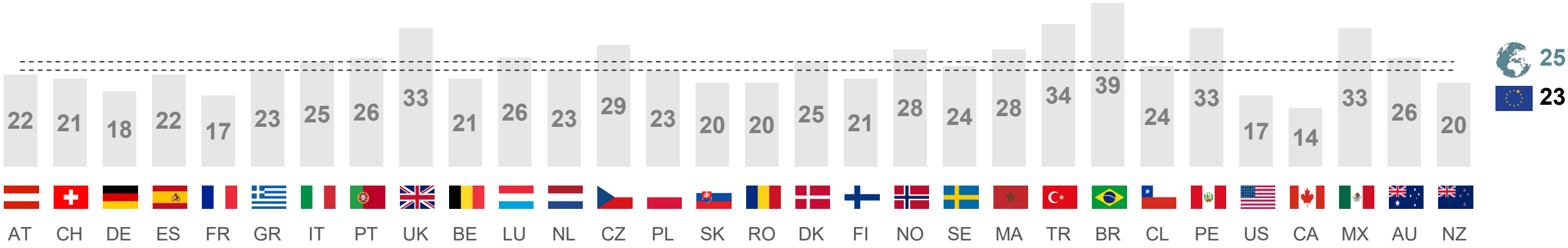
PROPORTION OF COMPANIES USING CONNECTED VEHICLES

LCVs

In %

LCVs

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

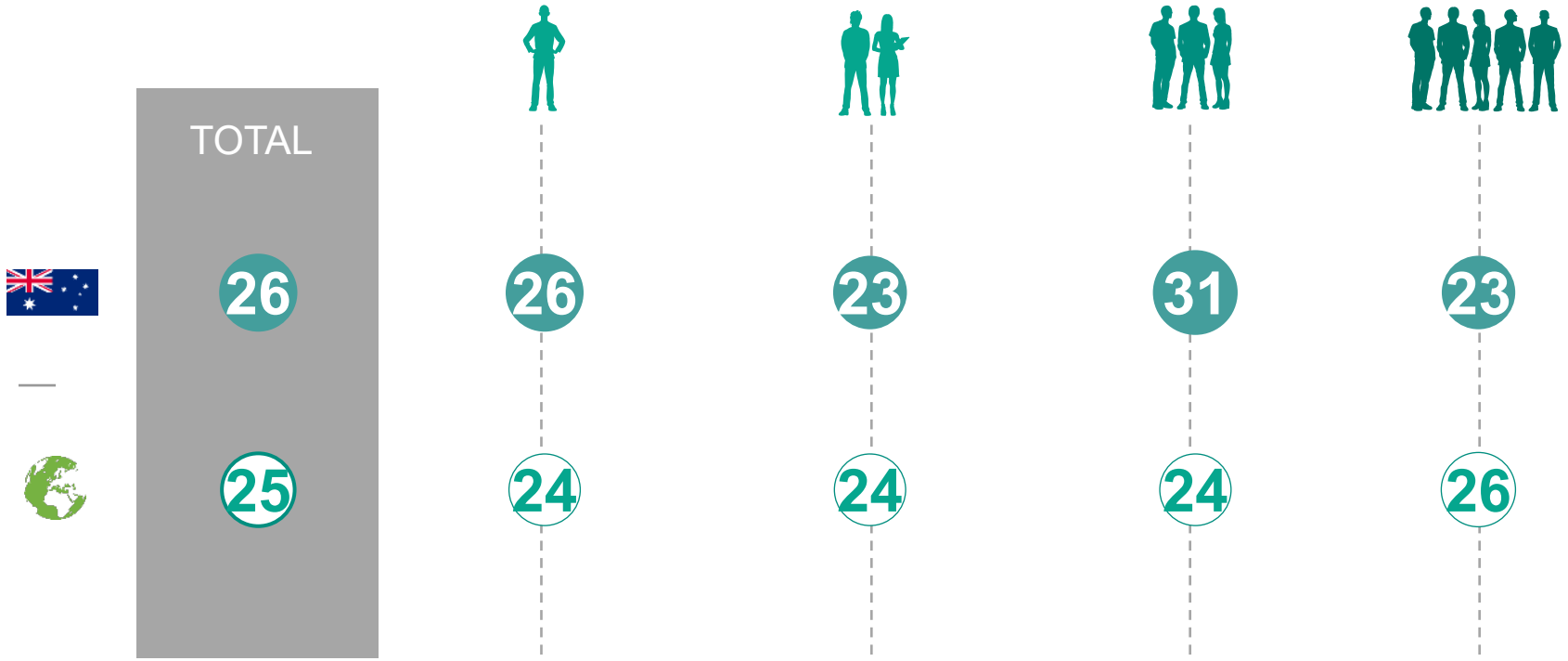
In %

LCVs

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

HOW TO READ THE RESULTS ?

26% 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 %



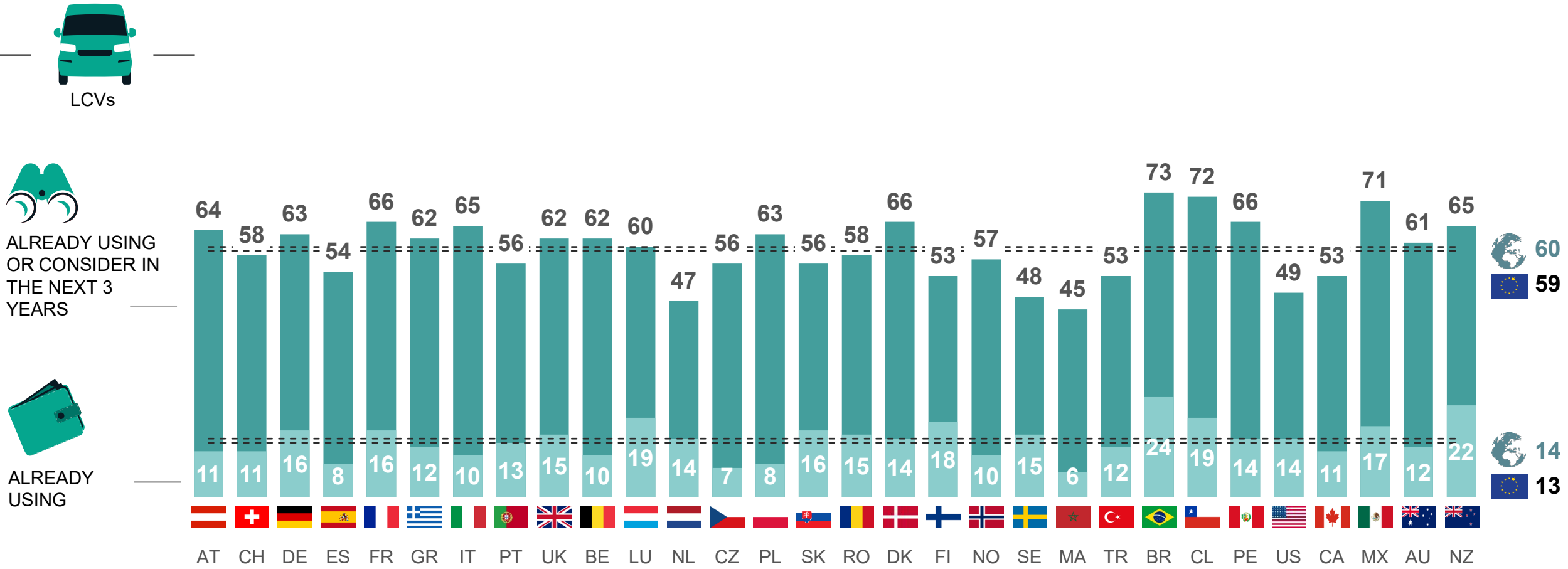
New question added in 2024

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

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

LCVs

In %



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.

APPENDIX



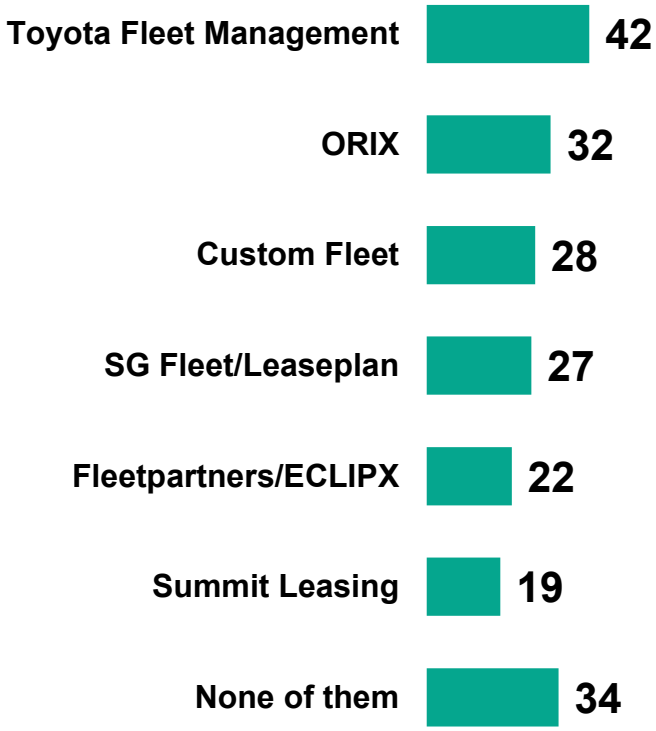


AWARENESS OF LEASING COMPANIES

In %



Passenger cars + LCVs



67 **% AWARE OF AT LEAST ONE BRAND**

3 Brands on average

Which of the following leasing companies do you know, if only by name?
Basis: companies with corporate vehicles = 100%


Arval Mobility Observatory
element
ARVAL
BNP PARIBAS GROUP
ELEMENT-ARVAL GLOBAL ALLIANCE

Thank you


Ipsos