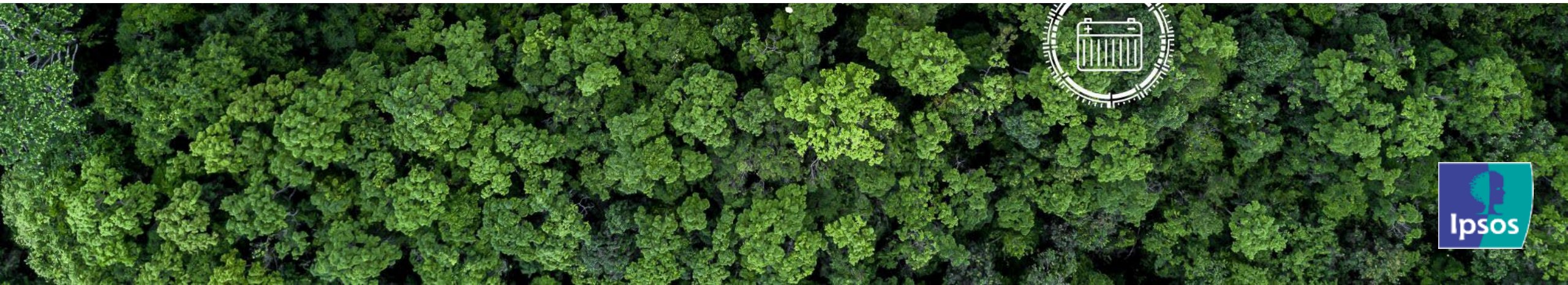
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MOBILITY AND FLEET BAROMETER 2024



Ipsos

2024 MOBILITY AND FLEET BAROMETER

01
Context and methodology p3

02
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03
What are the main characteristics of the fleets? p17

04
How are companies financing their fleet? p52

05
What changes are to be expected in the near future regarding energy mix? p61

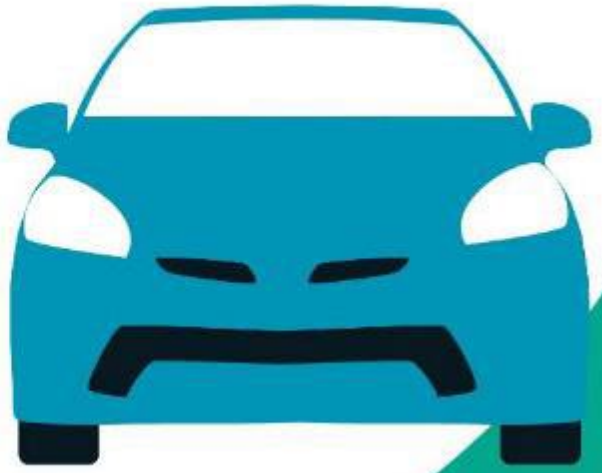
06
What are the perspectives in terms of mobility solutions ? p112

07
What are the usages in terms of connected vehicles, digital tools and road safety equipment? p145

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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

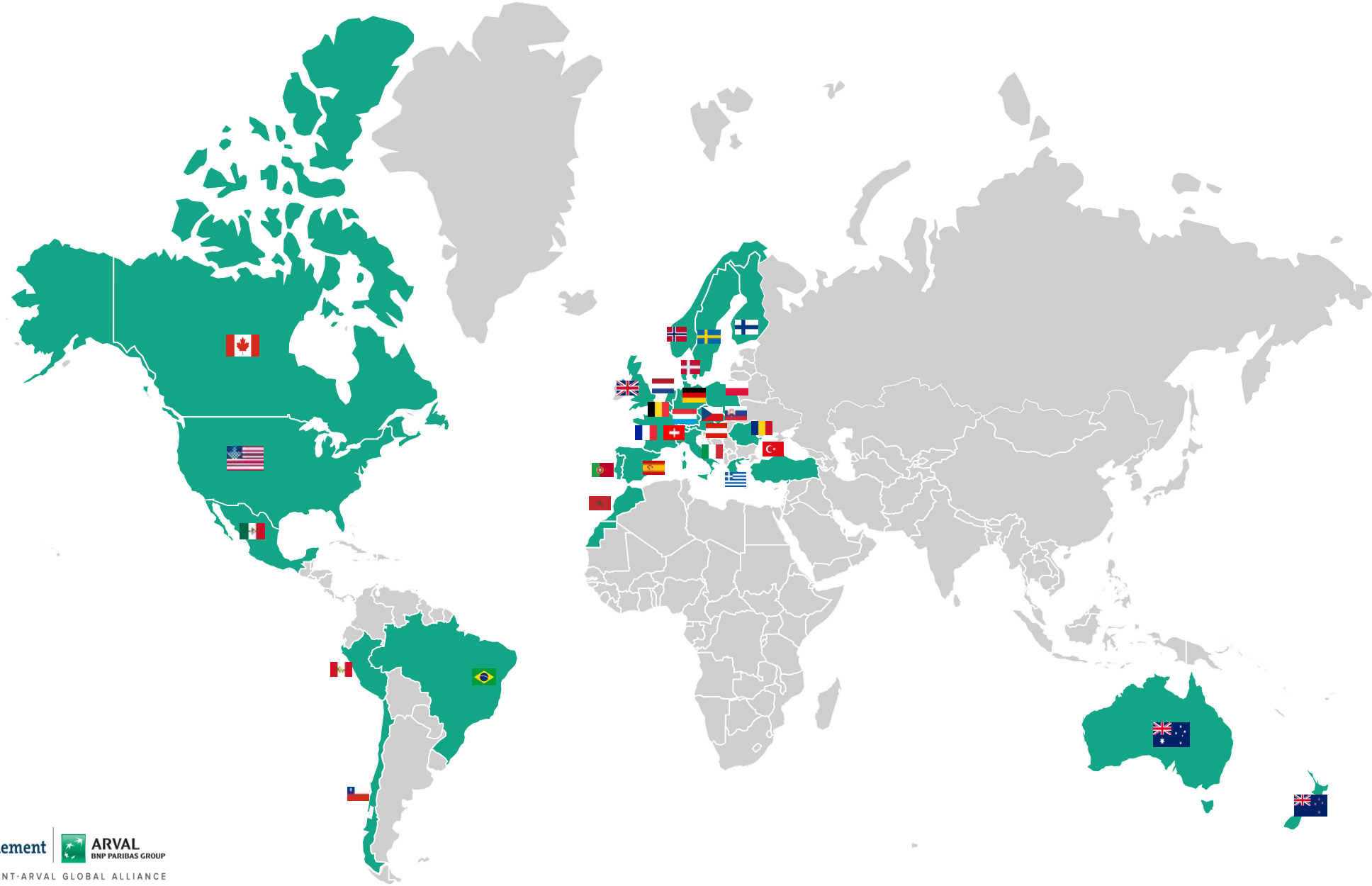
HOW DO MOBILITY SOLUTIONS IMPACT FLEET MANAGEMENT?

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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			●		●		●		●																	●				

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METHODOLOGY



DATA COLLECTION METHOD

CATI SYSTEM
(Computer Assisted Telephone Interviewing)
Recruitment by telephone



FIELDWORK PERIOD

SEPT 04 → NOV 13



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 CANADA

Perimeter of the survey: companies owning at least 1 vehicle





Companies with Less than 10 empl.
102 INTERVIEWS



Companies with 10 - 99 empl.
67 INTERVIEWS



Companies with 100 - 249 empl.
66 INTERVIEWS



Companies with 250 empl. or more
65 INTERVIEWS

1 to 99 employees
169 INTERVIEWS

100 employees and more
131 INTERVIEWS

SAMPLE STRUCTURE IN CANADA

Company size & sector

In %

					TOTAL
Construction Building Construction General Contractors And Operative Builders / Heavy Construction Other Than Building Construction Contractors / Construction Special Trade Contractors	5	6	7		5
Industry Mining, oil & gas, Manufacturing (e.g. food, tobacco, textile, wood, furniture, printing, publishing, chemicals, fabricated metal products, electronic, machinery, etc…)	56	53	63	65	59
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	30	23	21	21	24
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	10	18	9	13	12
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: CANADIAN COMPANIES STILL OPTIMISTIC FOR THE FUTURE OF THEIR FLEET

#1

STILL STRONG COST UNCERTAINTIES PERSIST

- Overall, **Canadian fleet managers are confident about the future of their fleet size**, which should remain stable or even grow for 9 out of 1 among them – in line with the global benchmark. 1 out of 3 expect an increase in the next 3 years. **Vehicles possession length is stable** (5,4 years on average) and tends to be shorter for passenger cars.
- **The main reason for fleet growth expectations is business development**, far ahead of HR related needs (talent recruitment, employee retainment) and offering vehicles to employees with no car eligibility – like globally.
- **Second-hand vehicles (pool cars and tool cars mainly) are used by 1 out of 4 companies**, and 6 out of 10 use or consider using some in the next 3 years – quite below the global averages. No differences based on the vehicle type or on the companies' sizes.
- The **impact of the development of remote working is limited**. Less than 1 company out of 5 has already implemented or considers some adjustment because of it, mainly by changing the company car policy in terms of mileage or models and by developing alternative mobility solutions. To note, a significant decrease in the number of companies allowing remote working.
- The **impact of the semiconductor shortage has significantly decreased** since last year – but still led to the extension of vehicles' life cycle and to the inclusion of additional vehicle manufacturers in addition to the ones previously used.
- **Costs increases are expected by fleet managers on all items**, including fuel expenses – though most did not adopt any strategy in response to the latter.
- **1 out of 2 Canadian companies see financial and legislative advices as important**. Same picture for technical and operational consultancy – whether for any types of vehicles or for light trucks more specifically.
- The **main future challenges for fleet managers are still mitigating the increase of total cost of ownership of the vehicles and managing longer vehicles' delivery**, followed by the implementation of alternative fuel technologies to adapt to restrictive public policies on petrol and diesel vehicles.

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INSIGHT 2: LEASING IS THE MAIN FINANCING METHOD

#2

OPERATING LEASING SHOWS A SOMEHOW LIMITED GROWTH POTENTIAL

- **The main financing method used by Canadian companies is leasing**. The picture is the same for passenger cars and for light trucks.
- **3 out of 10 companies intend to introduce or to increase the use of operating leasing** in the next 3 years – somehow below the stable global average. Growth potential for operating leasing has decreased.

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INSIGHT 3: ADOPTION OF ALTERNATIVE FUEL TECHS IS SOMEHOW LIMITED

#3

ADOPTION SHOWS MODERATE POTENTIAL VS GLOBAL TREND

- In Canada, **alternative fuel technologies (PHEV, HEV or 100% BEV) have been adopted by 4 out of 10 companies** – somehow below the global average. **Total consideration is low too**, no more than half of the companies having already adopted these techs or having the intention to adopt them (quite below global average).
- **The alternative fuel technologies adopted the most for passenger cars are HEV and 100% BEV**, PHEV being distanced. The picture is the same for small and for large companies.
- The adoption of these fuel alternative technologies for passenger cars is **mainly driven by their TCO (in line or lower than for ICE), by their lower environmental impact and to be able to drive in low emission zones**.
- To date, **100% BEV or Fuel Cell have been adopted by 1 out of 5 companies for their light trucks** – ahead of the global benchmark. **Fuel cell is almost non-existent** vs 100% BEV overall. Compliance with CSR policies, the lower environmental impact and the reduction in fuel expenses are the main drivers of the adoption of these alternatives for light trucks.
- About **two thirds of the Canadian companies have started preparation to operate zero-emission vehicles** in response to the Government ban on the sale of new petrol and diesel vehicles – early-stage preparation and plans for most of them.
- **Though, ICE is still seen as the #1 technology** powering passenger cars and light trucks in the next 3 years though. The lack of public charging points and the higher purchase price are the most important barriers to the adoption of 100% BEV, whether for passenger cars or for light trucks (but 3 out of 10 companies are planning to install charging points at their premises).
- **2 out of 10 companies are eligible to an ESG regulatory public reporting** to date, and 4 more will be in the next 2 years. Employees mobility is highly important for 3 out of 10 among them in this perspective.

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INSIGHT 4: LIMITED ADOPTION OF MOBILITY SOLUTIONS

#4

CORPORATE VEHICLES SEEN AS ESSENTIAL BUSINESS TRANSPORT TOOLS

- **Mobility solutions have been adopted by 4 out of 10 companies** (3 out of 10 among the largest ones) – quite below the global average. They are mostly seen as add-ons to corporate vehicles, which are still seen as essential business transport tools. Furthermore, half of the Canadian companies have policies in place for cars that are owned by employees but used on business.
- **The mobility solutions adopted the most are cash or car allowance and short or mid-term rental vehicles**, but still too a low extent.
- The **main reasons for implementing mobility solutions by the Canadian companies are HR related needs** (talent recruitment, employees retainment), improvement in the companies' image and tax incentives.
- **Employees mobility is seen as a strategic factor by 1 out of 4 companies**.

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INSIGHT 5: LIMITED USE OF CONNECTED VEHICLES

#5

USAGE OF TELEMATICS DATA IS LOW TOO

- **Connected vehicles are used by 3 out of 10 companies** – below the 40% global average and with no difference between passenger cars and light trucks.
- **Half 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 – below the global average here too. Less than 1 out of 5 is currently using the data.
- **Automatic emergency braking system and collision avoidance or warning systems are seen as the most useful ADAS** in order to improve the drivers' safety. Adaptative cruise control follows.

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3

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





CANADIAN COMPANIES STILL OPTIMISTIC FOR THE FUTURE OF THEIR FLEET, DESPITE PERSISTING UNCERTAINTIES ON COSTS

1

In Canada, **fleet managers are confident about the future of their fleet size**, which should remain stable or even grow for 9 out of 1 among them – in line with the global benchmark. 1 out of 3 expect an increase in the next 3 years.

Vehicles possession length is stable (5,4 years on average), in line with the global picture and tends to be shorter for passenger cars.

Business development remains the main reason for fleet growth expectations (68%), far ahead of HR related needs (talent recruitment, employees retainment) and offering vehicles to employees with no car eligibility – like globally.

2

1 out of 4 companies uses second-hand vehicles (pool cars and tool cars mainly) and 6 out of 10 use or consider using some in the next 3 years – quite below the global averages (resp. 43% and 83%). No differences based on vehicle types or on company sizes.

3

Less than 1 company out of 5 has already implemented or considers some adjustment because of the development of remote working (in line with the global trend), mainly by changing the company car policy in terms of mileage or models and by developing alternative mobility solutions. To note, **a significant decrease in the number of companies allowing remote working** (31%, -14 pts).

The **impact of the semiconductor shortage has significantly decreased** since last year (35%, -9 pts) – but still led to the extension of vehicles' life cycle and to the inclusion of additional vehicle manufacturers in addition to the ones previously used.

4

Companies anticipate rising costs on all items, including fuel expenses – though most did not adopt any strategy in response to the latter.

1 out of 2 Canadian companies see financial and legislative advices as important. Same picture for technical and operational consultancy – whether for any types of vehicles or for light trucks more specifically.

Mitigating the increase of total cost of ownership of the vehicles and managing longer vehicles' delivery time are still by far the main future challenges for fleet managers, followed by the implementation of alternative fuel technologies to adapt to restrictive public policies on petrol and diesel vehicles.

FLEET PROFILE

MOBILITY POLICY ADAPTATION COINCIDING WITH REMOTE WORKING

16% changed the policy or consider changing

16%

FLEET POSSESSION LENGTH

5.4 years

5.5 years *5.6*

ANTICIPATED FLEET EVOLUTION

(% will increase or remain stable)

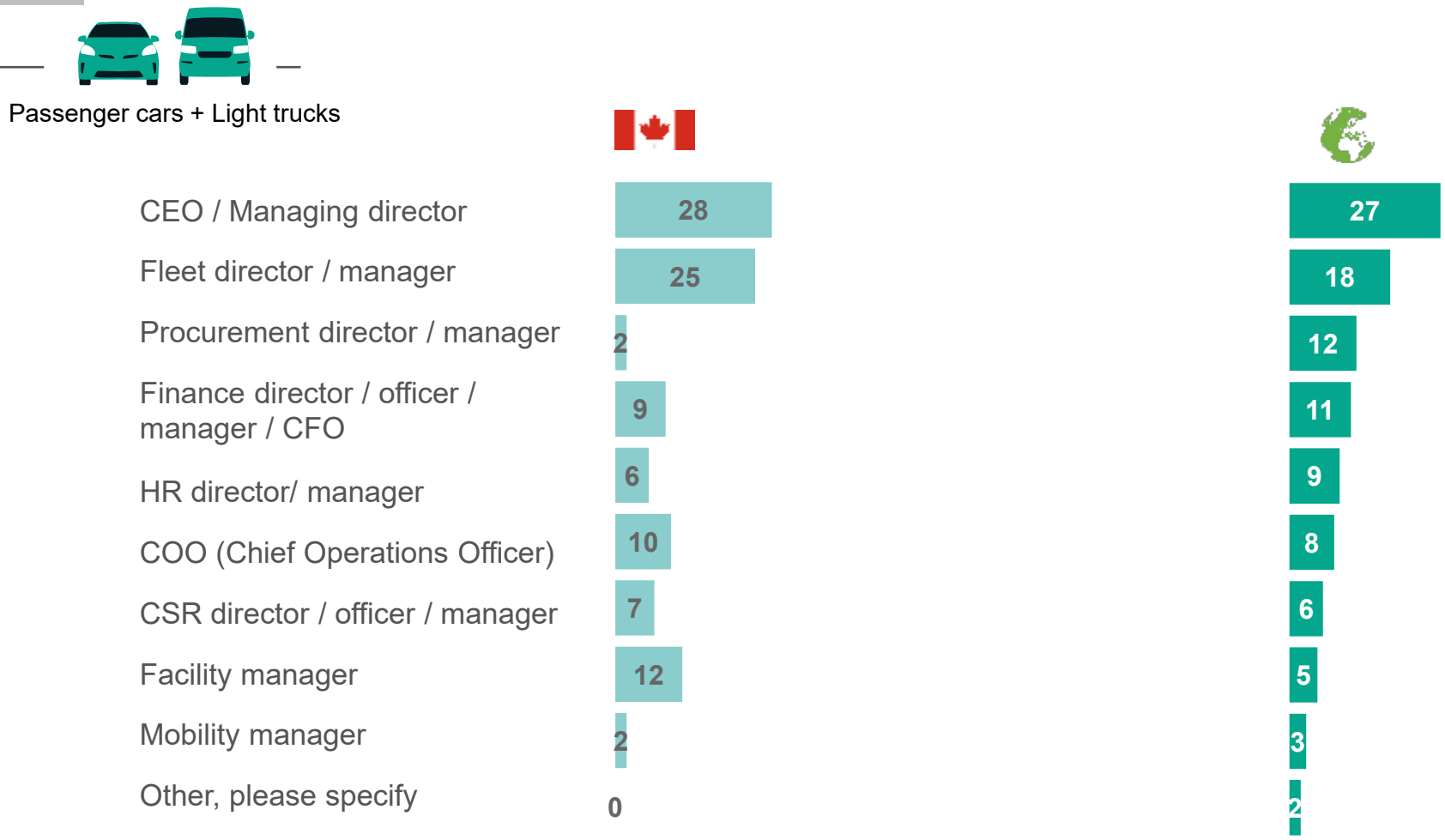
92%

91%

RESPONDENTS POSITION WITHIN THE COMPANY

In %

Passenger cars + Light trucks

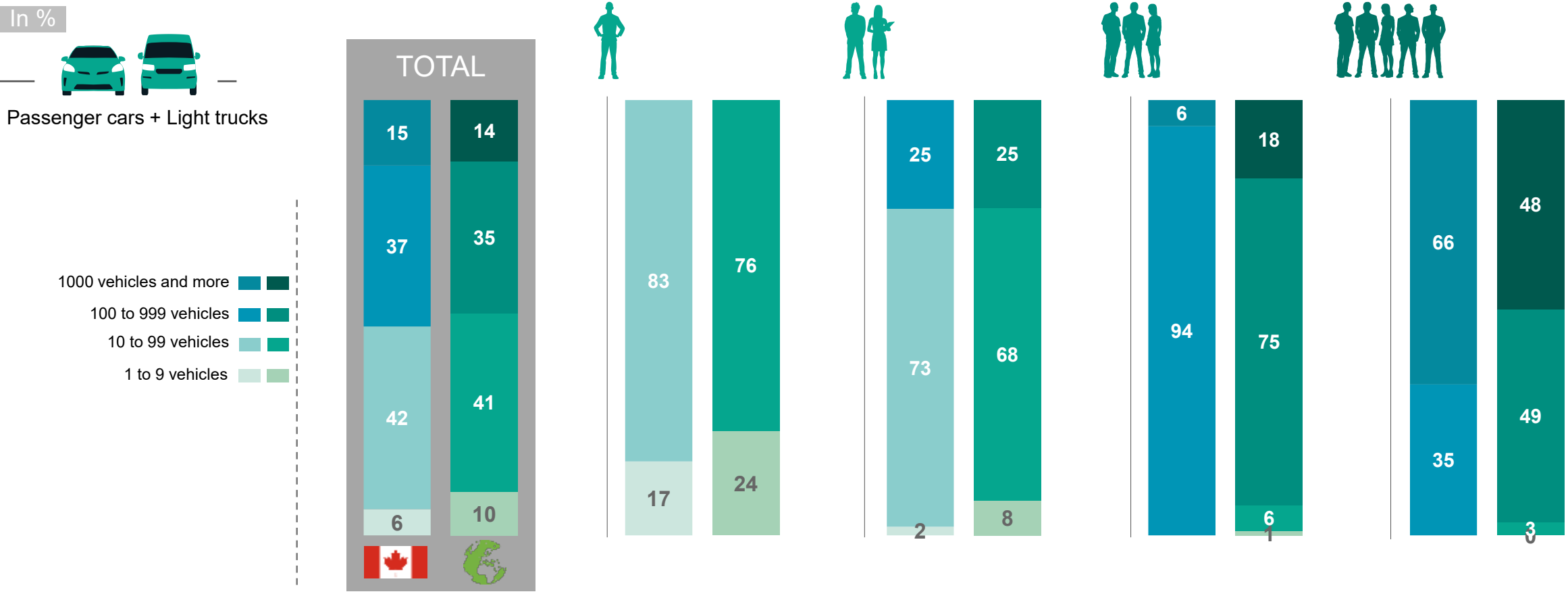


Could you please specify your exact position in the company?
Basis: companies with corporate vehicles = 100%

NUMBER OF VEHICLES IN FLEET

In %

Passenger cars + Light trucks



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 LIGHT TRUCK

(among companies with at least one vehicle in fleet)

In %

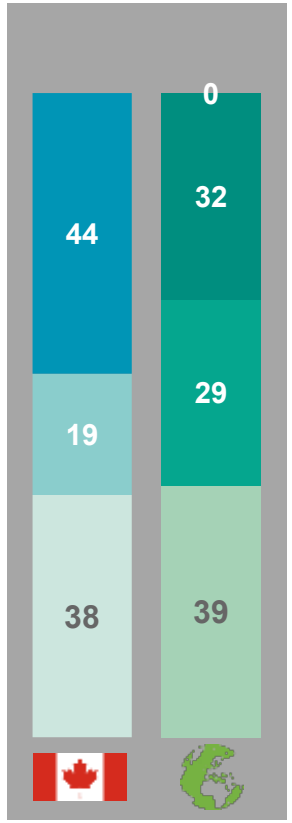
		TOTAL				
PASSENGER CARS	🇨🇦	99	98	100	100	100
	🌍	98	97	98	100	100
VANS OR Light trucks	🇨🇦	100	99	100	100	100
	🌍	99	98	97	99	99

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

NUMBER OF PASSENGER CARS IN FLEET

In %

Passenger cars



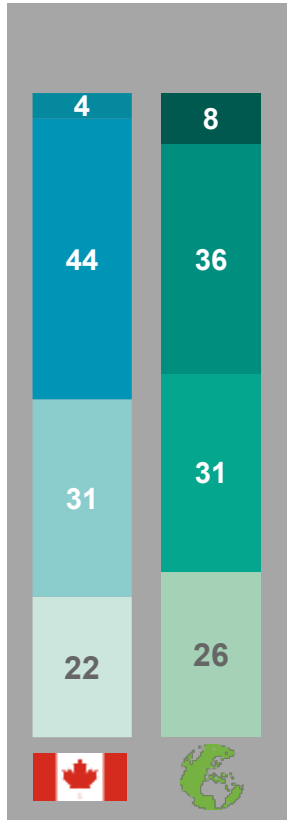


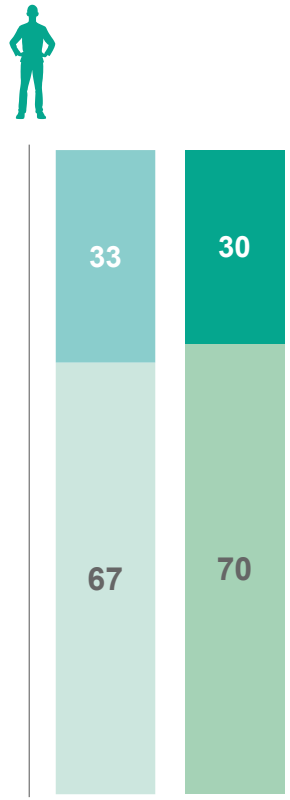
And can you please tell us the total number of cars in your fleet?
Basis: companies with passenger cars

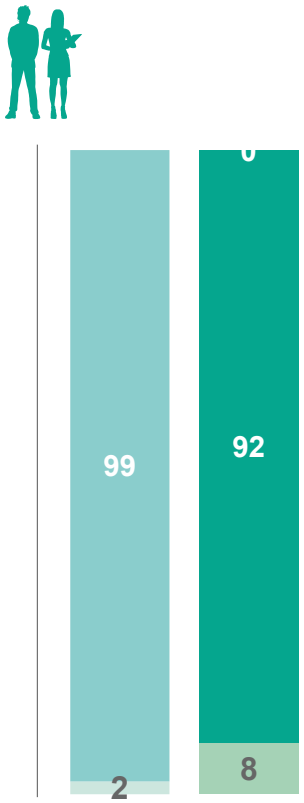
NUMBER OF LIGHT TRUCKS IN FLEET

In %

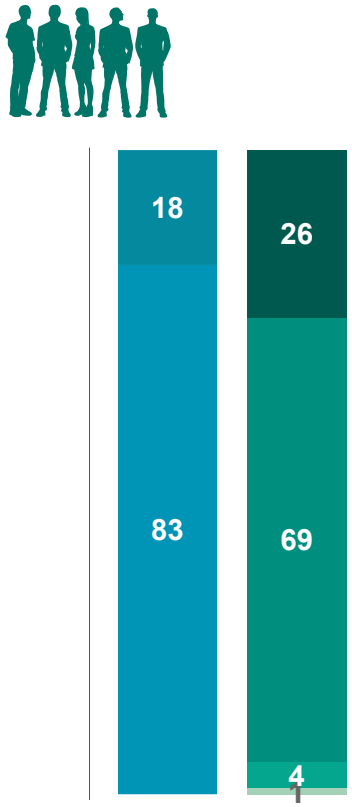
Light trucks











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 Light trucks or vans in your fleet?
Basis: companies with Light trucks

VEHICLES POSSESSION LENGTH



Passenger cars + Light trucks

AVERAGE IN YEARS

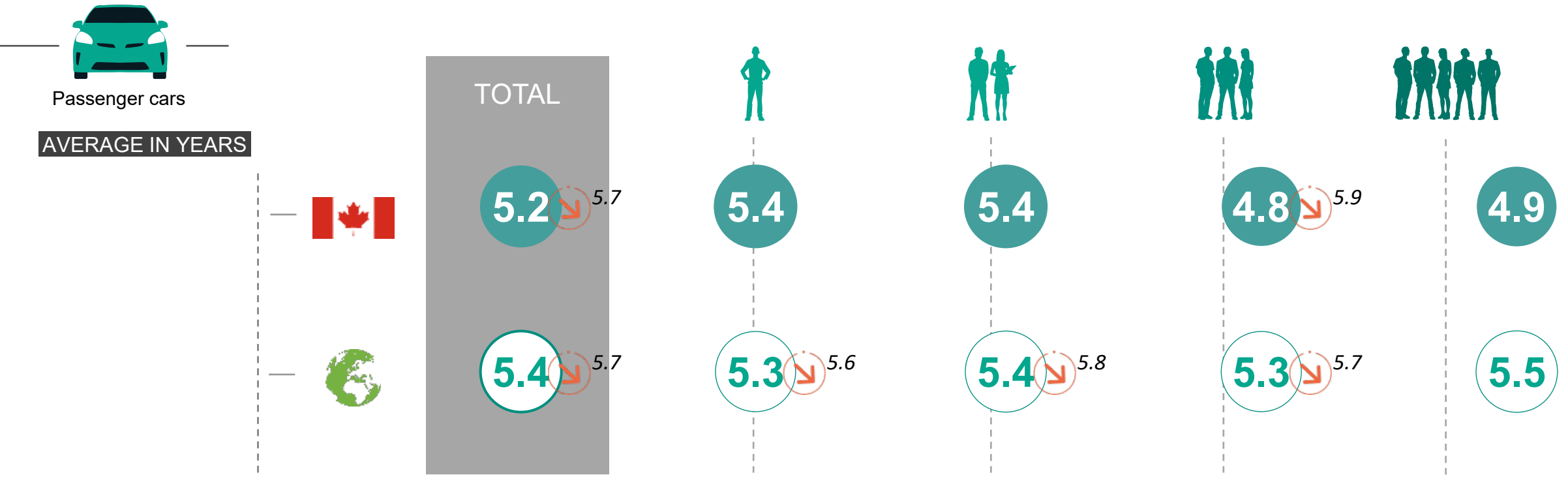




	TOTAL				
	5.4	5.6	5.7	5.1 (6.1)	5.2
	5.5 (5.6)	5.5	5.6	5.5	5.6

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

PASSENGER CARS POSSESSION LENGTH



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

LIGHT TRUCKS POSSESSION LENGTH



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

VEHICLE REPLACEMENT



Passenger cars

		TOTAL				
Cars	AVERAGE IN MONTHS	52	51	49	55	53
	AVERAGE MILES/KM	85400	91500	81200	81200	85300
SUVs	AVERAGE IN MONTHS	59	59	57	59	65
	AVERAGE MILES/KM	114500	113000	118100	104600	126700

New question added in 2024

Generally, when do you replace your vehicles (in months and /or in miles)?

Basis: companies with passenger cars

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VEHICLE REPLACEMENT



Light trucks

		TOTAL	1	2	3	4+
Pick ups	AVERAGE IN MONTHS	67	64	66	72	64
	AVERAGE MILES/KM	142400	136100	142100	148000	145300
Medium Trucks	AVERAGE IN MONTHS	65	62	64	67	67
	AVERAGE MILES/KM	106200	109300	107600	96100	112600
Heavy Trucks	AVERAGE IN MONTHS	68	68	59	75	68
	AVERAGE MILES/KM	165200	160900	176400	168000	157300

New question added in 2024

Generally, when do you replace your vehicles (in months and /or in miles)?

Basis: companies with Light trucks

FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

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

In %

Passenger cars + Light trucks



% Stable or increase	TOTAL		1	2	3	4	5
	92	91	91	91	88	96	92	91	90
Increase	33	28	34	27	28	42	29	21	27
Remain stable	59	63	57	64	59	53	63	70	64
Decrease	8	7	8	7	11	5	6	9	8

9

26

BALANCE in pts (INCREASE ⊖ DECREASE)

	TOTAL		1	2	3	4	5
2024	+25	+21	+26	+20	+17	+21	+38	+23	+12	+19
2023	+24	+20	+10	+19	+36	+22	+29	+19	+26	+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 Canada, 92% of the companies declare that in the next 3 years their company fleet will remain stable or increase.

In %

Passenger cars + Light trucks





91



91



6



7

	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
% 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

	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	+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%

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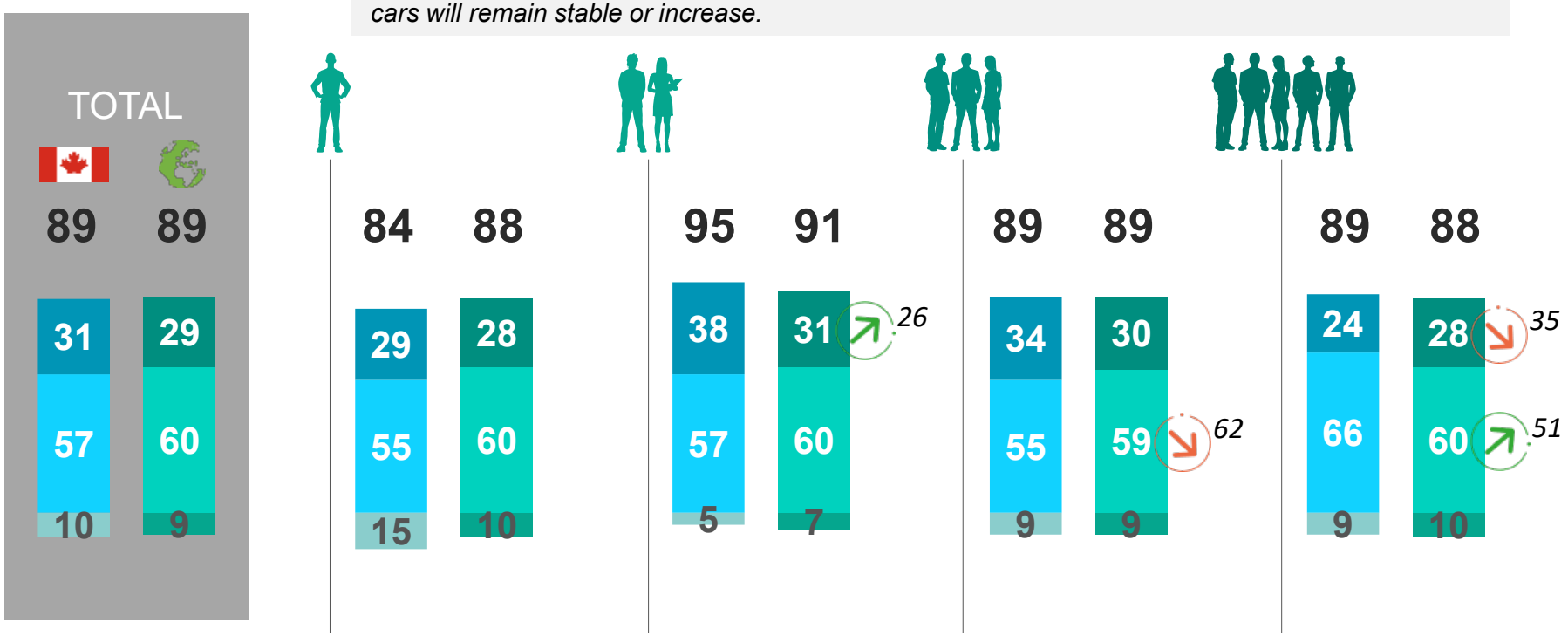
PASSENGER CAR FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Canada, 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	+21	+20	+14	+19	+34	+24	+25	+21	+14	+18
2023	+21	+20	+18	+19	+37	+18	+20	+19	+14	+24

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

Basis: companies with passenger cars

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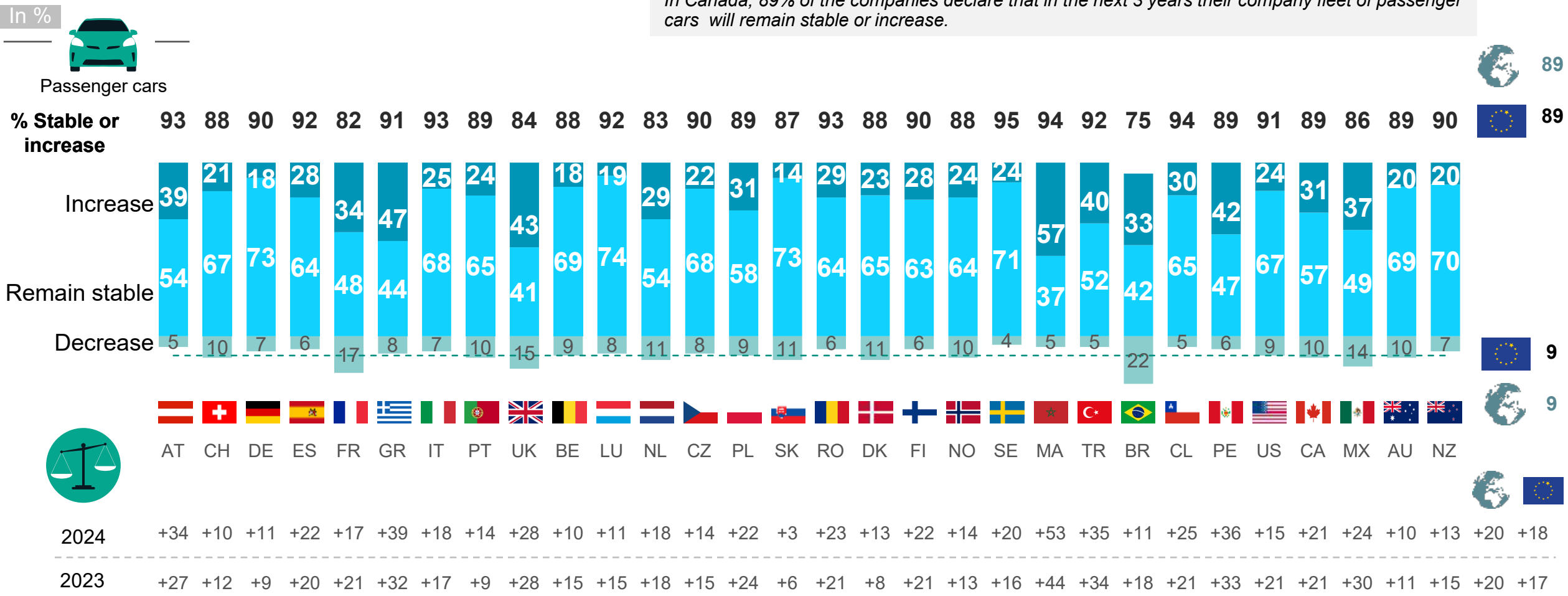
PASSENGER CAR FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Canada, 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

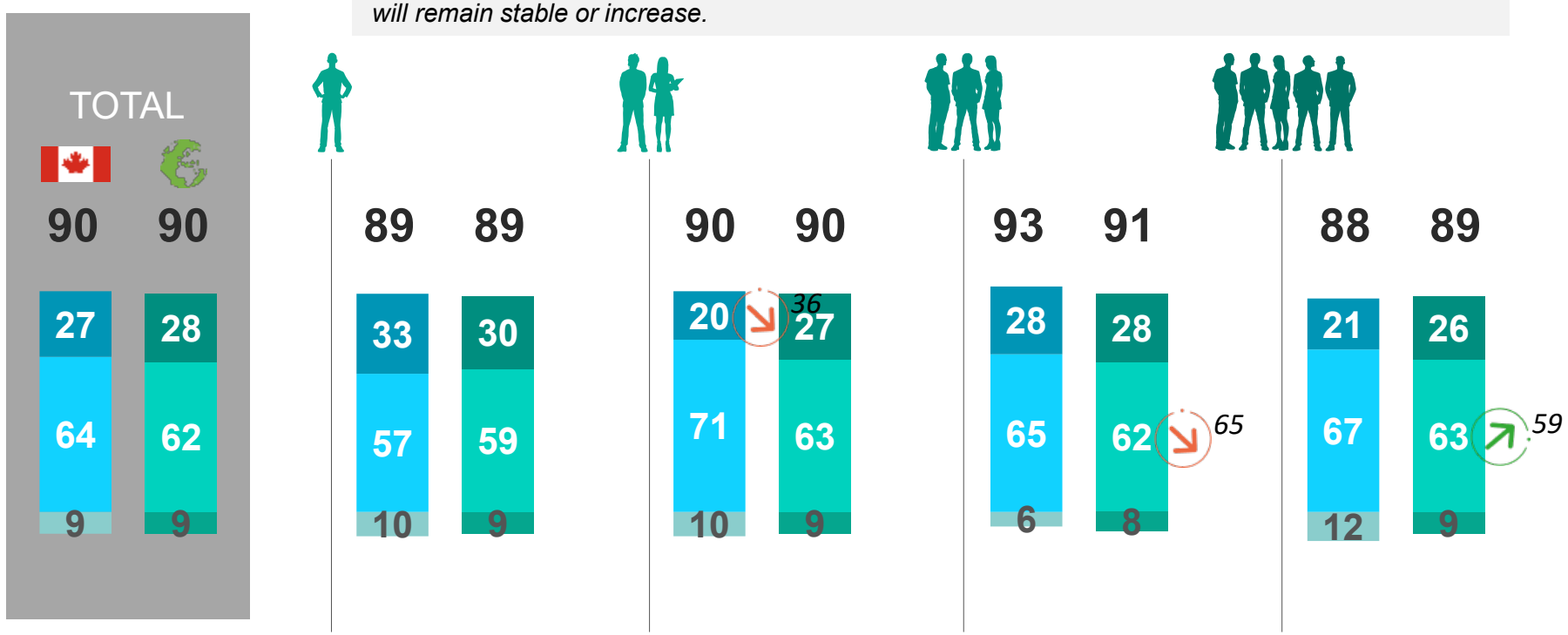
LIGHT TRUCKS FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Canada, 90% of the companies declare that in the next 3 years the total number of Light trucks will remain stable or increase.

In %

Light trucks



BALANCE in pts (INCREASE ⊖ DECREASE)

2024	+17	+19	+23	+20	+10	+18	+22	+20	+10	+17
2023	+24	+19	+10	+21	+27	+18	+26	+19	+28	+20

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

Basis: companies with Light trucks

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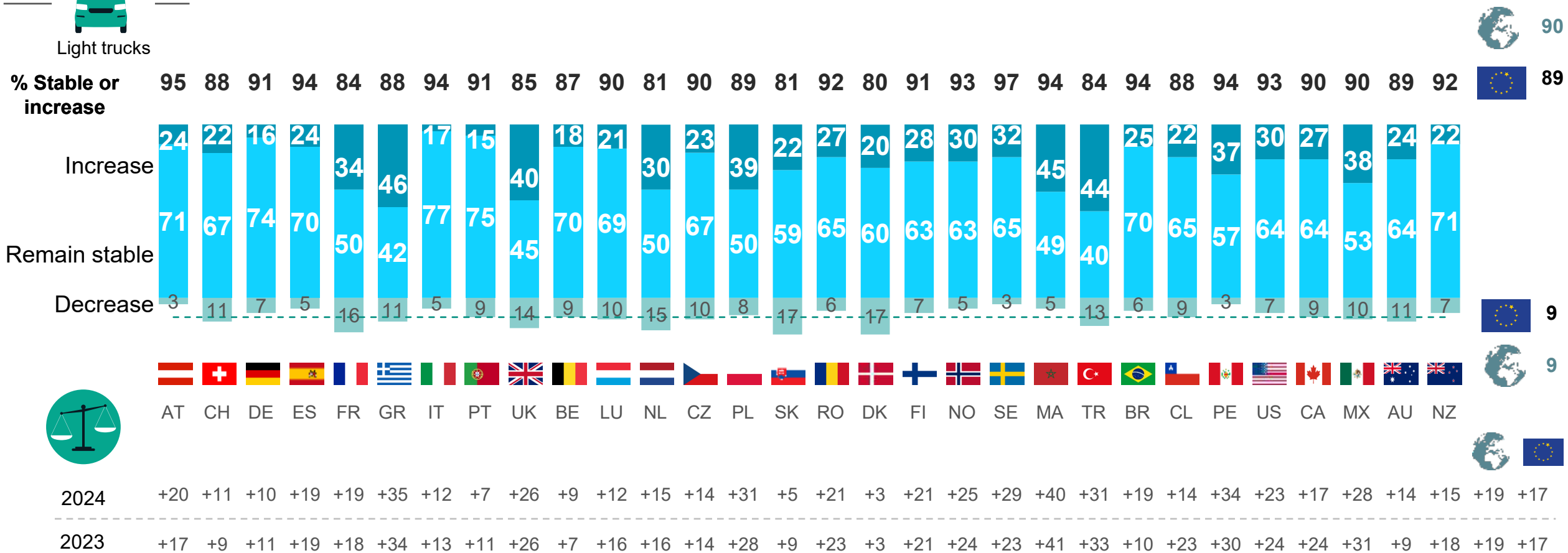
LIGHT TRUCKS FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

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

In %

Light trucks



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

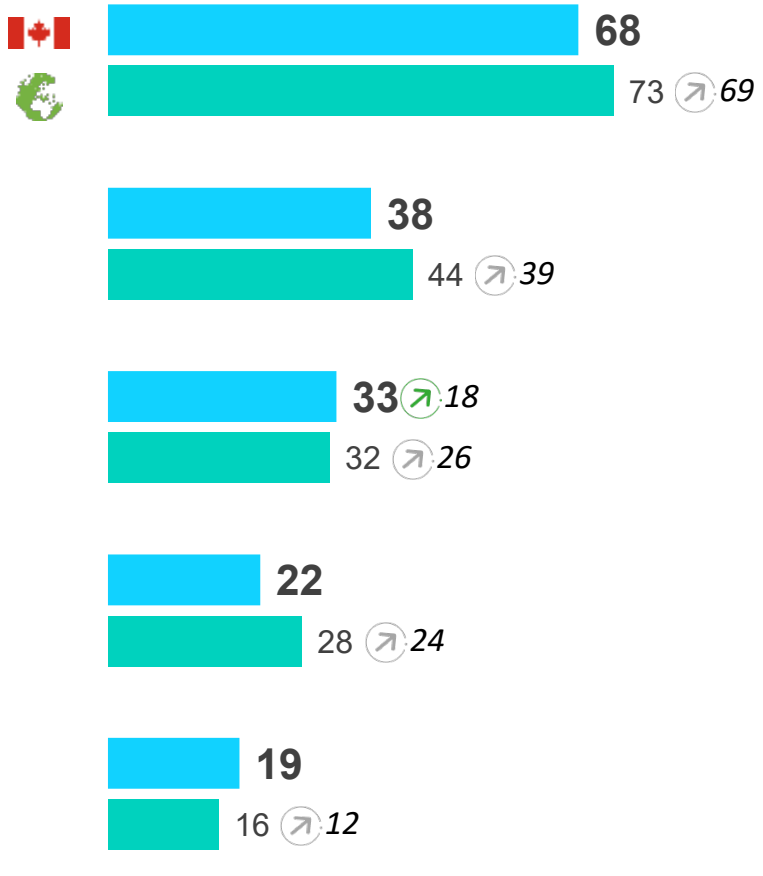
Basis: companies with Light trucks

REASON FOR FUTURE FLEET INCREASE

In %

Passenger cars + Light trucks





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

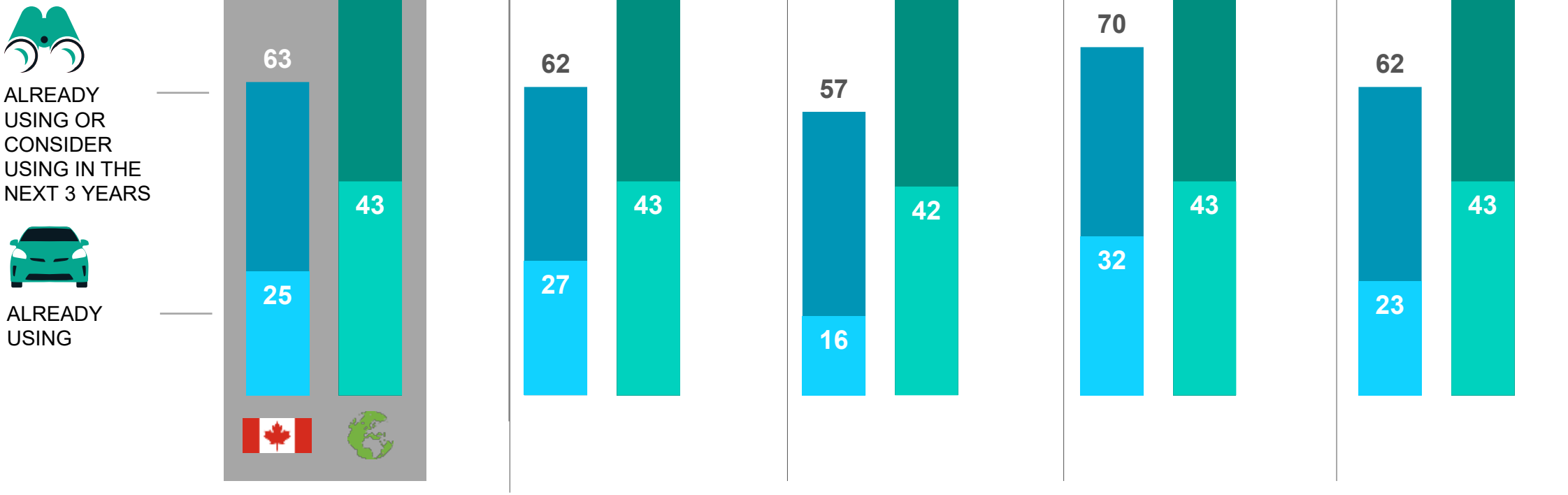
SECOND-HAND VEHICULES

HOW TO READ THE RESULTS ?

In Canada, 63% of the companies are already using or consider to use second-hand vehicles in the next 3 years. 25% of the companies are currently using some.

In %

Passenger cars + Light trucks



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 REMOTE WORKING

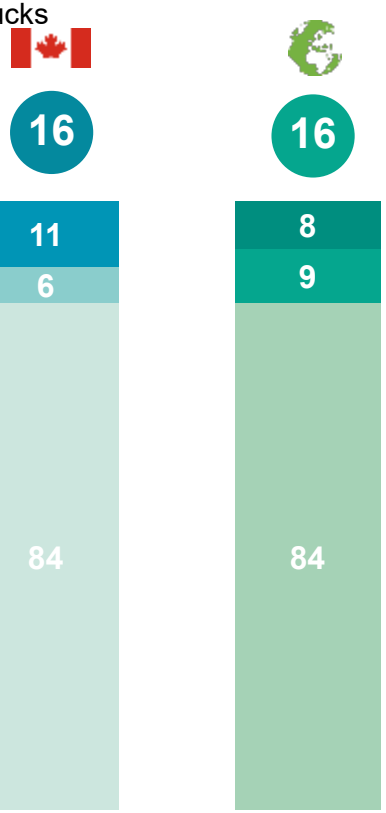
HOW TO READ THE RESULTS ?

In Canada, among the companies that changed or consider changing their mobility policy, 14% have already reduced the total number of the vehicles in the company's fleet.

In %

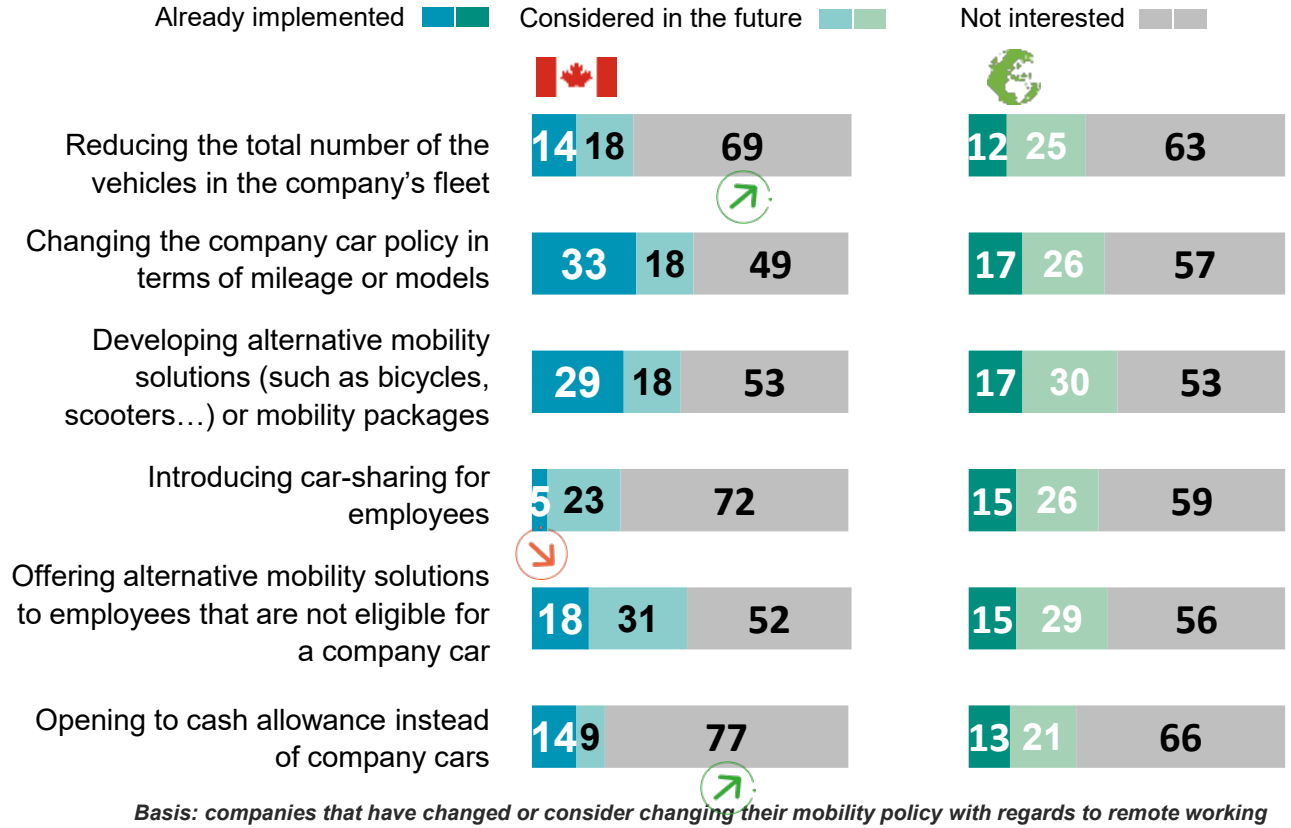
Passenger cars + Light trucks





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 remote working



Basis: companies with corporate vehicles = 100%

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

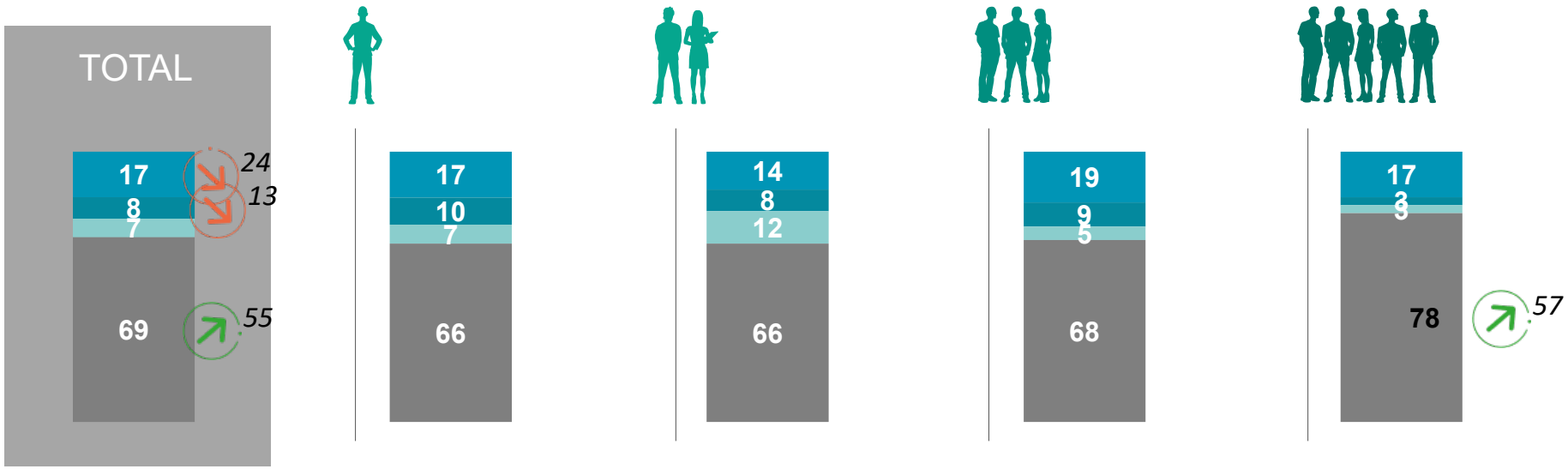
With regards to the development of remote working, have you changed, or do you consider changing your mobility/fleet policy?
And among the following changes, can you please select those you have implemented or consider implementing with regards to the development of remote working?

Question asked to respondents that are aware of mobility solutions

REMOTE WORKING EVOLUTION SINCE COVID CRISIS

In %

Passenger cars + Light trucks



Expected decrease of kms for the car drivers

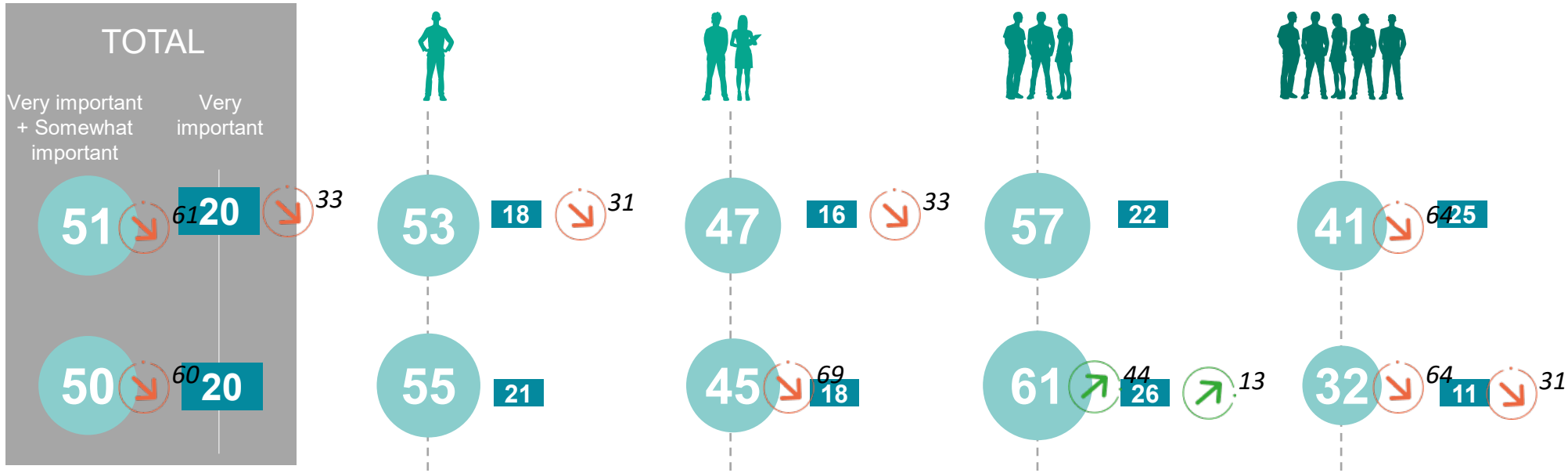
13% **14%** **15%** **10%** **14%**

Have you introduced or increased remote working 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 remote working
Basis: companies which have introduced or increased or kept the same level of remote working ?

IMPORTANCE TO RECEIVE ADVICE AND SERVICES FOR FLEET

In %

Passenger cars + Light trucks

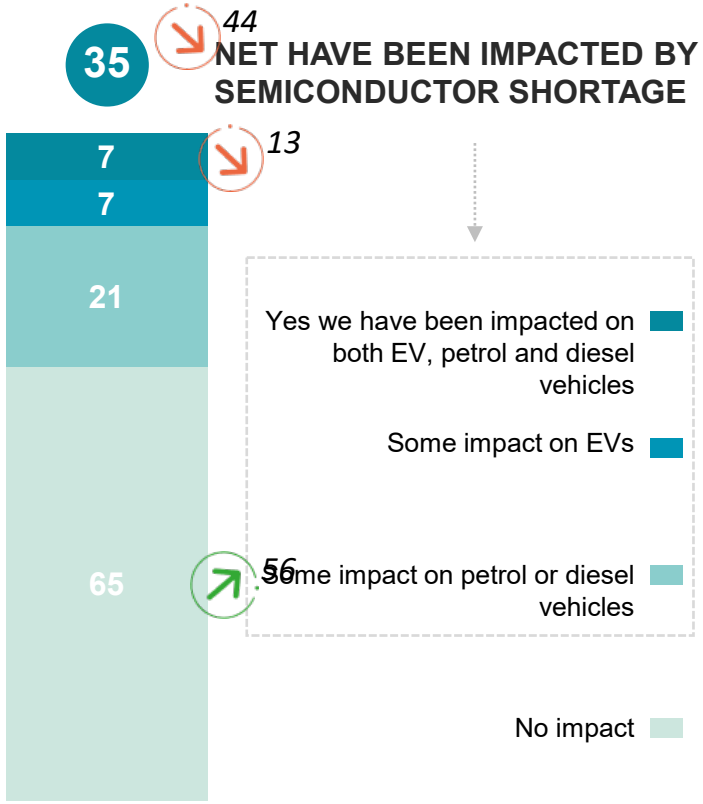


How important is it to receive technical and operational consultancy (e.g. best vehicle / fit out options) with respect to your fleet?
How important is it to receive financial and legislative advice (e.g. funding options / CO_2) with respect to your fleet?
Basis: companies with corporate vehicles = 100%

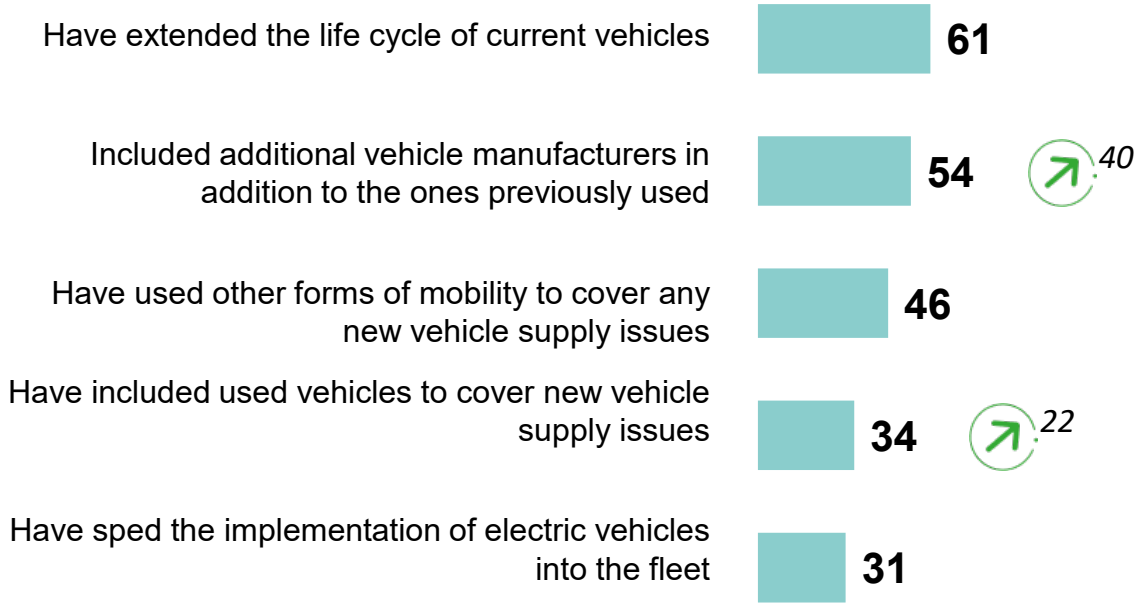
IMPACT OF SEMICONDUCTOR SHORTAGE ON THE FLEET AND TAKEN ACTIONS

In %

Passenger cars + Light trucks



Basis: companies with corporate vehicles = 100%



Basis: companies that have been impacted by semiconductor shortage

Have your fleet renewals been impacted by the semiconductor shortage??
What actions have you taken in response to the impact on your fleet due to the semiconductor shortage?

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STRATEGIES ADOPTED IN RESPONSE TO RISING PETROL AND DIESEL PRICES

In %

Passenger cars + Light trucks



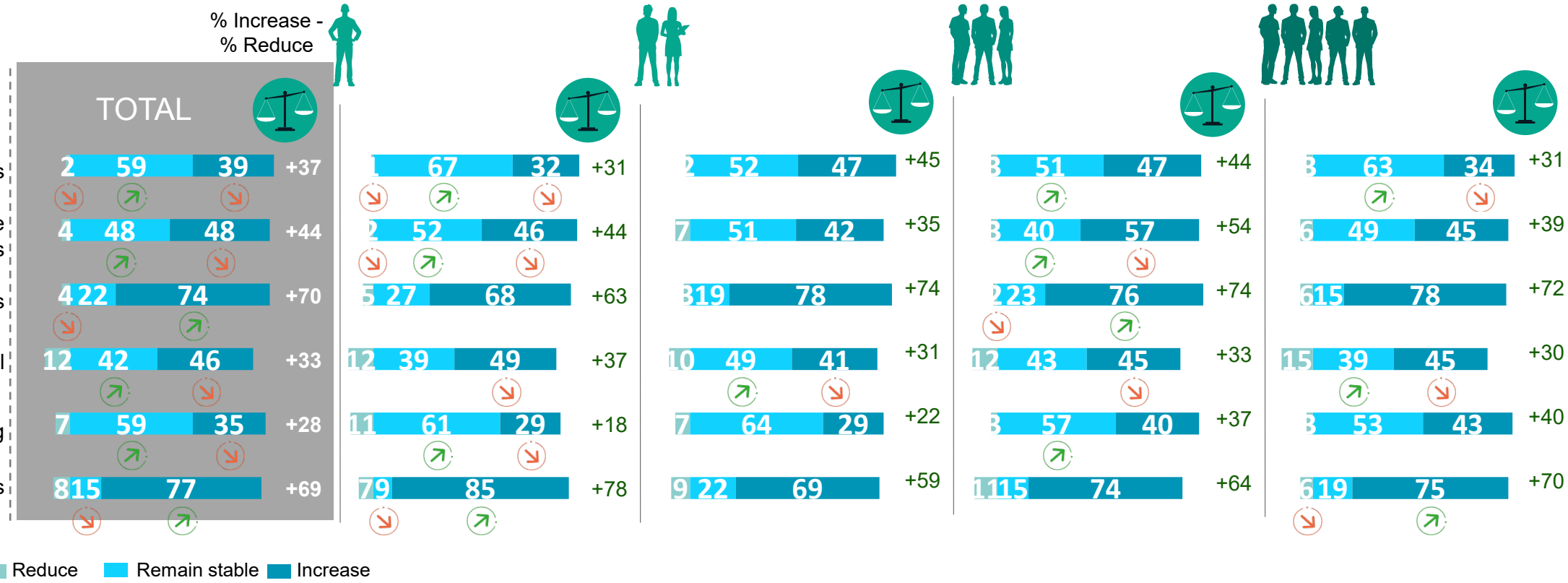
	TOTAL									
We are monitoring fuel spending using fleet software	11		9		15		13		9	
We have adopted a fuel card	9		11	2	9		9		8	
We are monitoring driver behaviour on the road	9		10		9		11		5	16
We have made economies elsewhere in our business as a result	8		10		3		9		7	
We are buying fuel from lower price outlets	6	13	6		3	20	9		5	
We have sped the electrification of our fleet	6		7		6		7		2	12
We are covering fewer miles	4	9	4	14	5		6		3	
None of the above	72	59	69		76	46	67		79	62

Which of these strategies have you adopted in response to rising petrol and diesel prices?
Basis: companies with corporate vehicles = 100%

EXPECTATIONS TOWARDS VEHICLE COSTS DURING NEXT YEAR

In %

Passenger cars + Light trucks



What do you expect to happen to vehicle costs in these areas during the next year for your fleet?
Basis: companies with corporate vehicles = 100%

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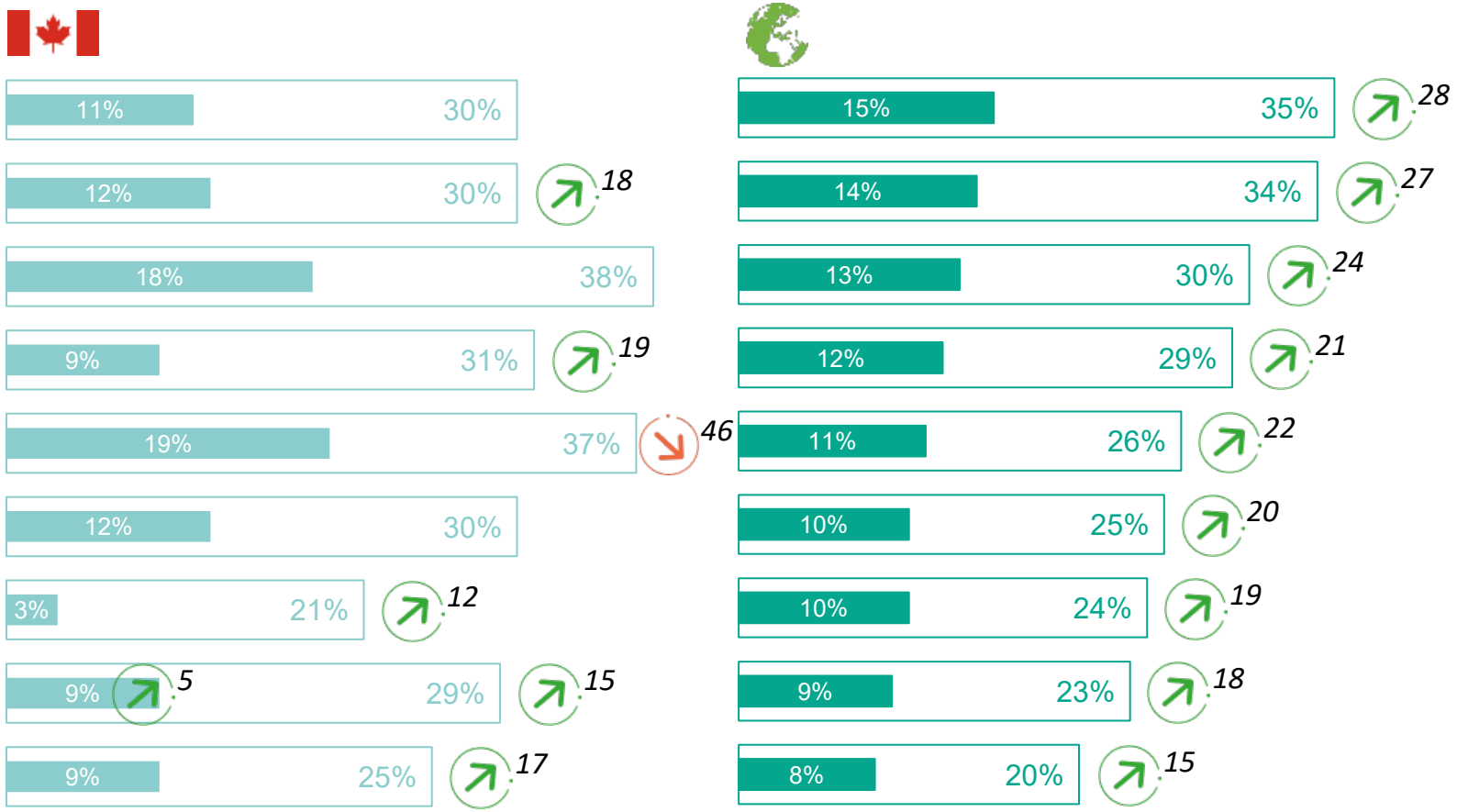
MOST IMPORTANT CHALLENGES EXPECTED

In %

Passenger cars + Light trucks

Nb 1 challenge

Top 3 challenges



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?



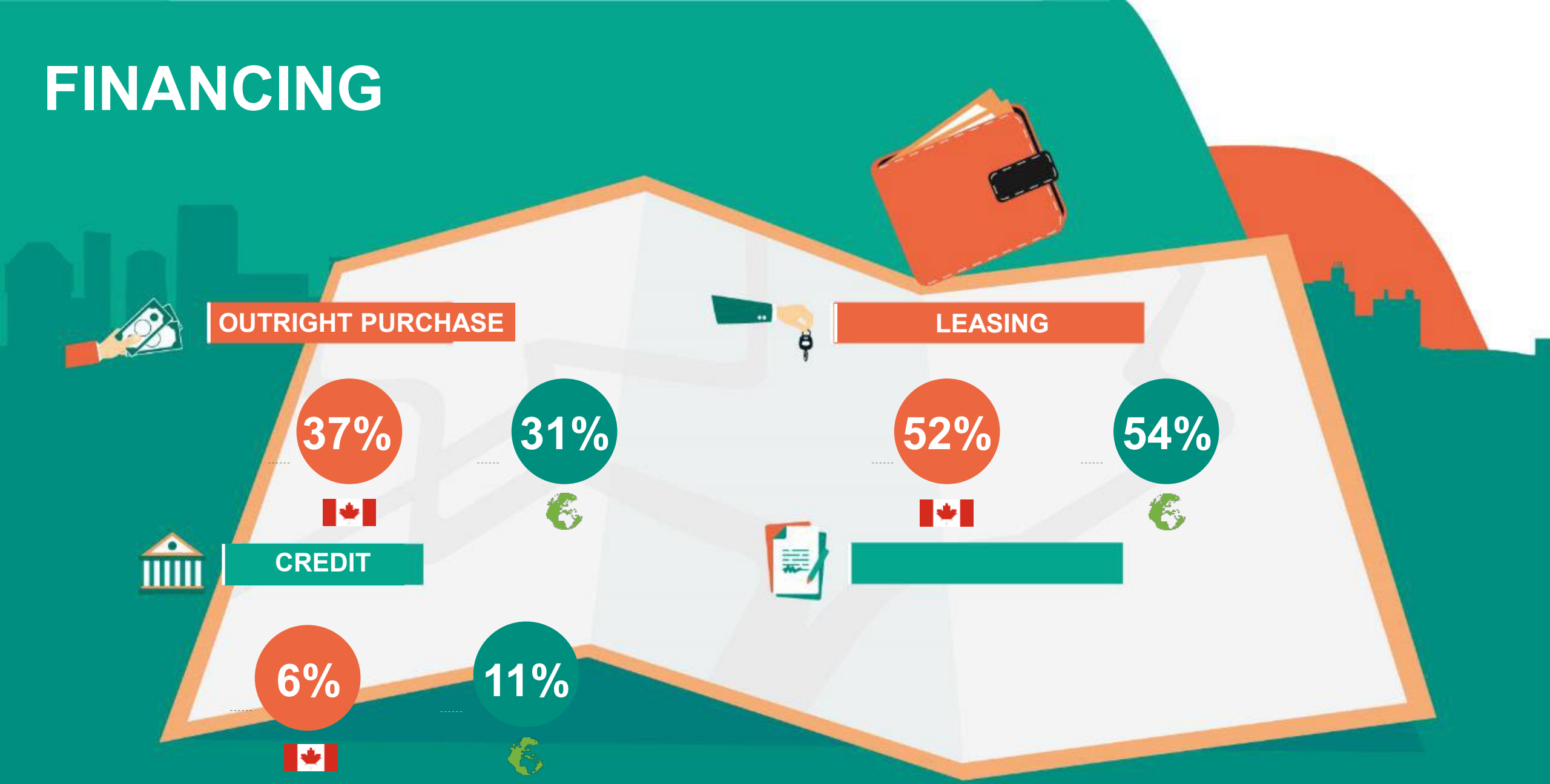


LEASING IS THE MAIN FINANCING METHOD - OPERATING LEASING SHOWS A SOMEHOW LIMITED GROWTH POTENTIAL

1. **Leasing is the main financing method used by Canadian companies** (52%). The picture is the same for passenger cars and for light trucks.

2. **Growth potential for operating leasing has decreased** (- 9pts vs last year). 3 out of 10 companies intend to introduce or to increase its use in the next 3 years – somehow below the stable 36% global average.

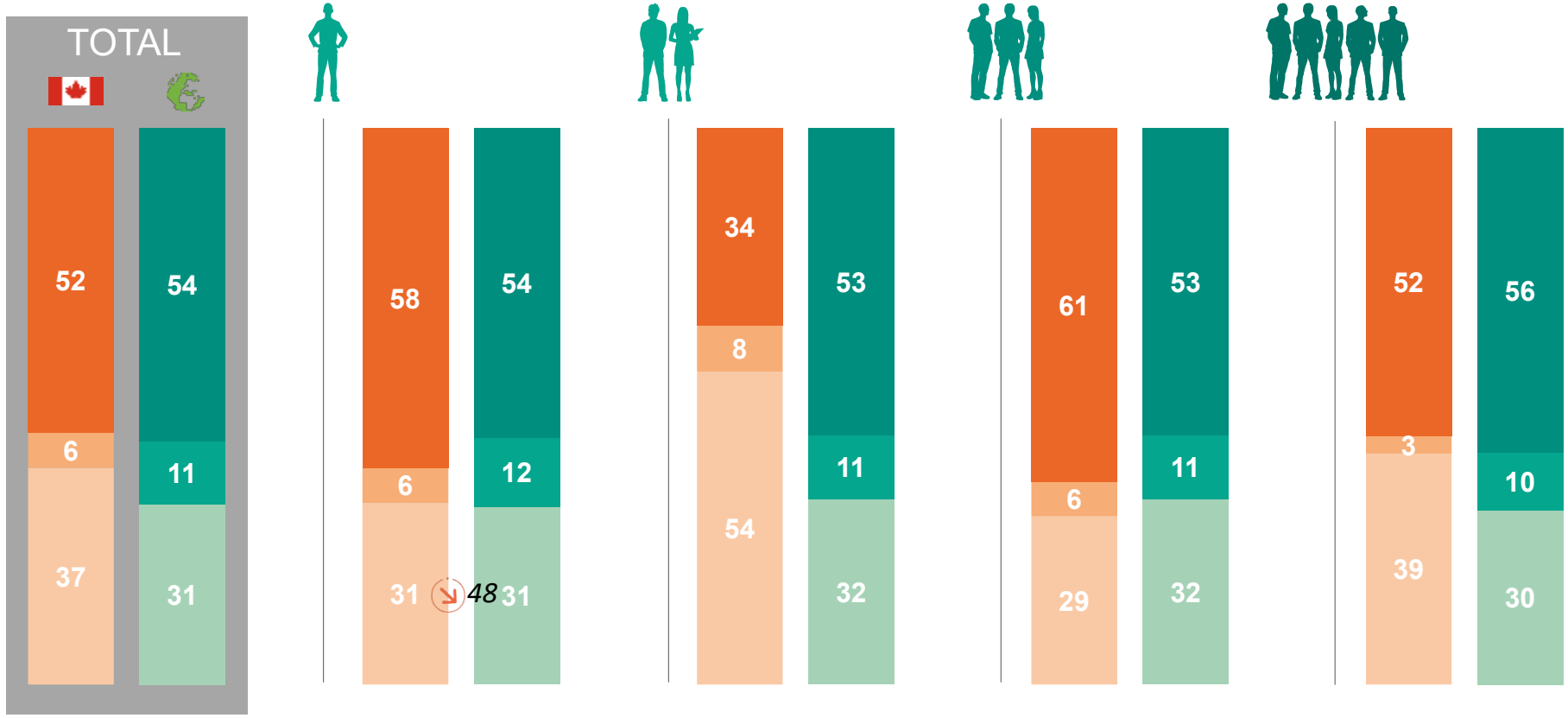
FINANCING



MAIN FLEET FINANCING METHOD

In %

Passenger cars + Light trucks



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

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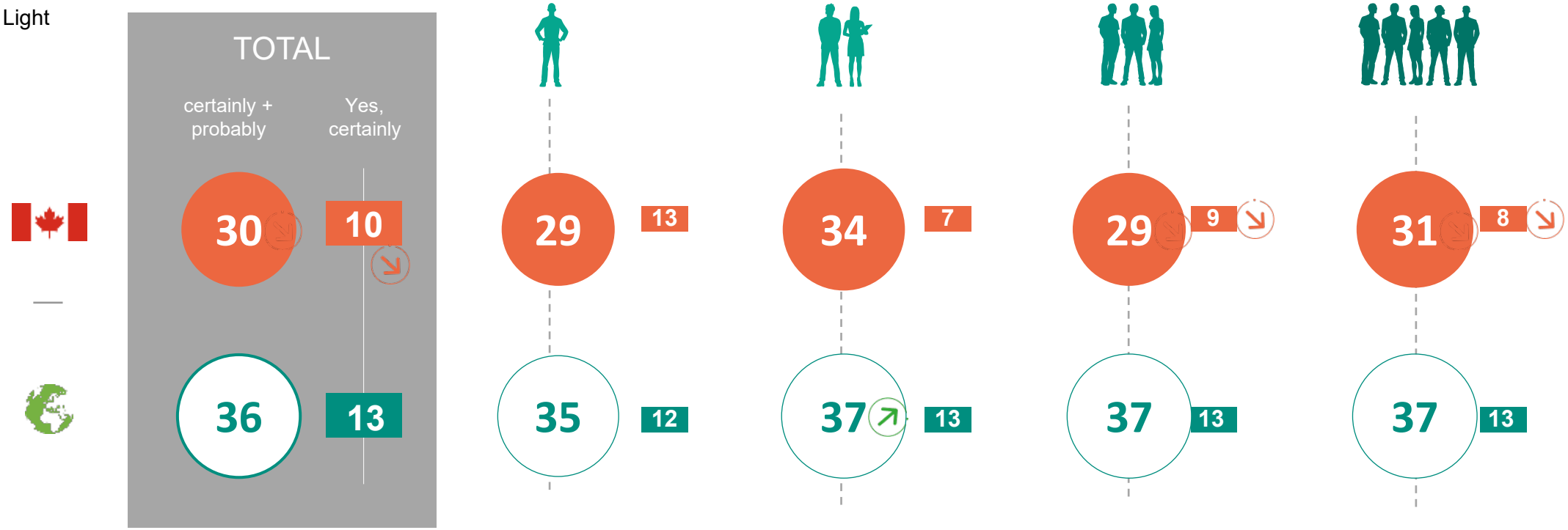
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INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATING LEASING

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

In %

Passenger cars + Light trucks



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 %



Passenger cars + Light trucks

	TOTAL Total certainly + probably	TOTAL Yes, certainly	1	2	3	4	5	6	7	8
2024	30	10	29	13	34	7	29	9	31	8
2023	39	18	18	12	31	13	57	26	57	21
2024	36	13	35	12	37	13	37	13	37	13
2023	35	12	34	12	32	12	37	12	37	14

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?



ADOPTION OF ALTERNATIVE FUEL TECHS IS SOMEHOW LIMITED AND SHOWS MODERATE POTENTIAL VS GLOBAL TREND

1

As for passenger cars, **4 out of 10 companies have adopted at least one alternative fuel technology in Canada** (among PHEV, HEV and 100% BEV) – somehow below the 49% global average. **Total consideration is low too**, no more than half of the companies having already adopted these techs or having the intention to adopt them (vs 70% globally).

HEV (19%) and 100% BEV (17%) are the alternative fuel technologies adopted the most for passenger cars, PHEV being distanced (9%). The picture is the same for small and for large companies.

The main drivers of the adoption of these alternative fuel technologies for passenger cars are related to the fact **their TCO is in line or lower than for ICE** (51%), to their lower environmental impact (45%) and to be able to drive in low emission zones (45% too).

2

As for light trucks, 1 out of 5 companies has adopted 100% BEV or Fuel Cell to date – ahead of the global benchmark (11%). Fuel cell (2% adoption) is almost non-existent when compared to 100% BEV (18%) overall. Compliance with CSR policies (34%), **the lower environmental impact (33%) and the reduction in fuel expenses (32%) are the main drivers** of the adoption of these alternatives for light trucks.

3

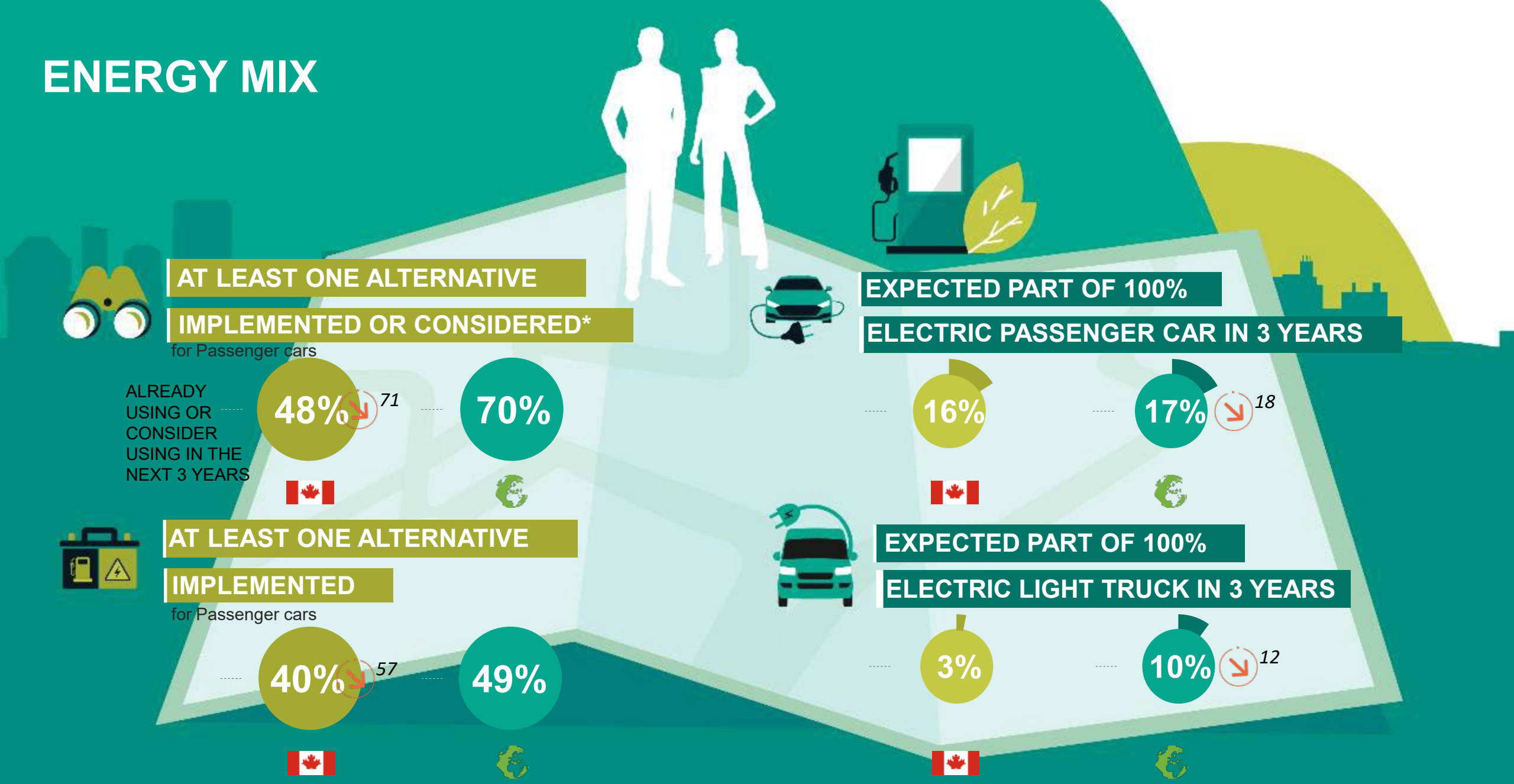
Overall, about **two thirds of the Canadian companies have started preparation to operate zero-emission vehicles in response to the Government ban on the sale of new petrol and diesel vehicles** – early-stage preparation and plans for most of them.

Though, ICE is still seen as the #1 technology powering passenger cars (70%) and light trucks (94%) in the next 3 years though. The lack of public charging points and the higher purchase price are the most important barriers to the adoption of 100% BEV, whether for passenger cars or for light trucks (but 3 out of 10 companies are planning to install charging points at their premises).

4

2 out of 10 companies are eligible to an ESG regulatory public reporting to date, and 4 more will be in the next 2 years. Employees mobility is highly important for 3 out of 10 among them in this perspective.

ENERGY MIX



AT LEAST ONE ALTERNATIVE IMPLEMENTED OR CONSIDERED*

for Passenger cars

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

48% 71

70%

AT LEAST ONE ALTERNATIVE IMPLEMENTED

for Passenger cars

40% 57

49%

EXPECTED PART OF 100% ELECTRIC PASSENGER CAR IN 3 YEARS

16%

17% 18

EXPECTED PART OF 100% ELECTRIC LIGHT TRUCK IN 3 YEARS

3%

10% 12

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

CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

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

In %

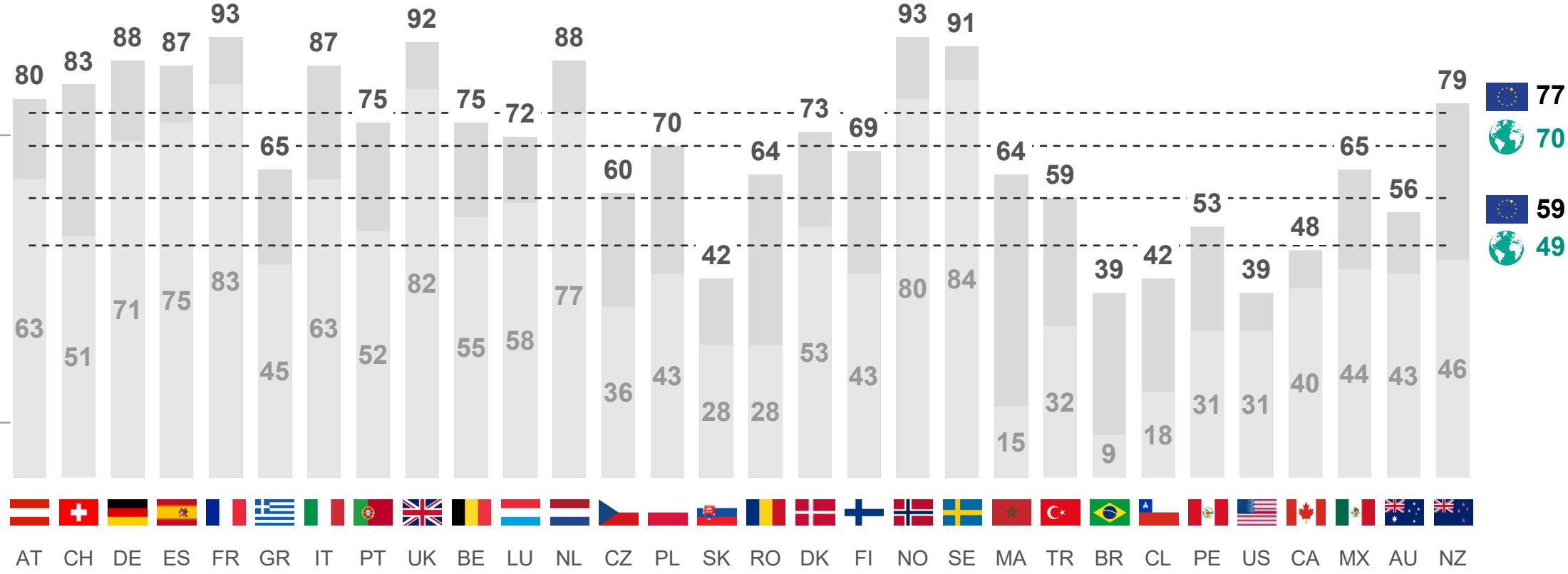
HOW TO READ THE RESULTS ?

In Canada, 48% of the companies are already using or consider to implement at least one alternative technology in the next 3 years. 40% of the companies is currently using at least one.

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

CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

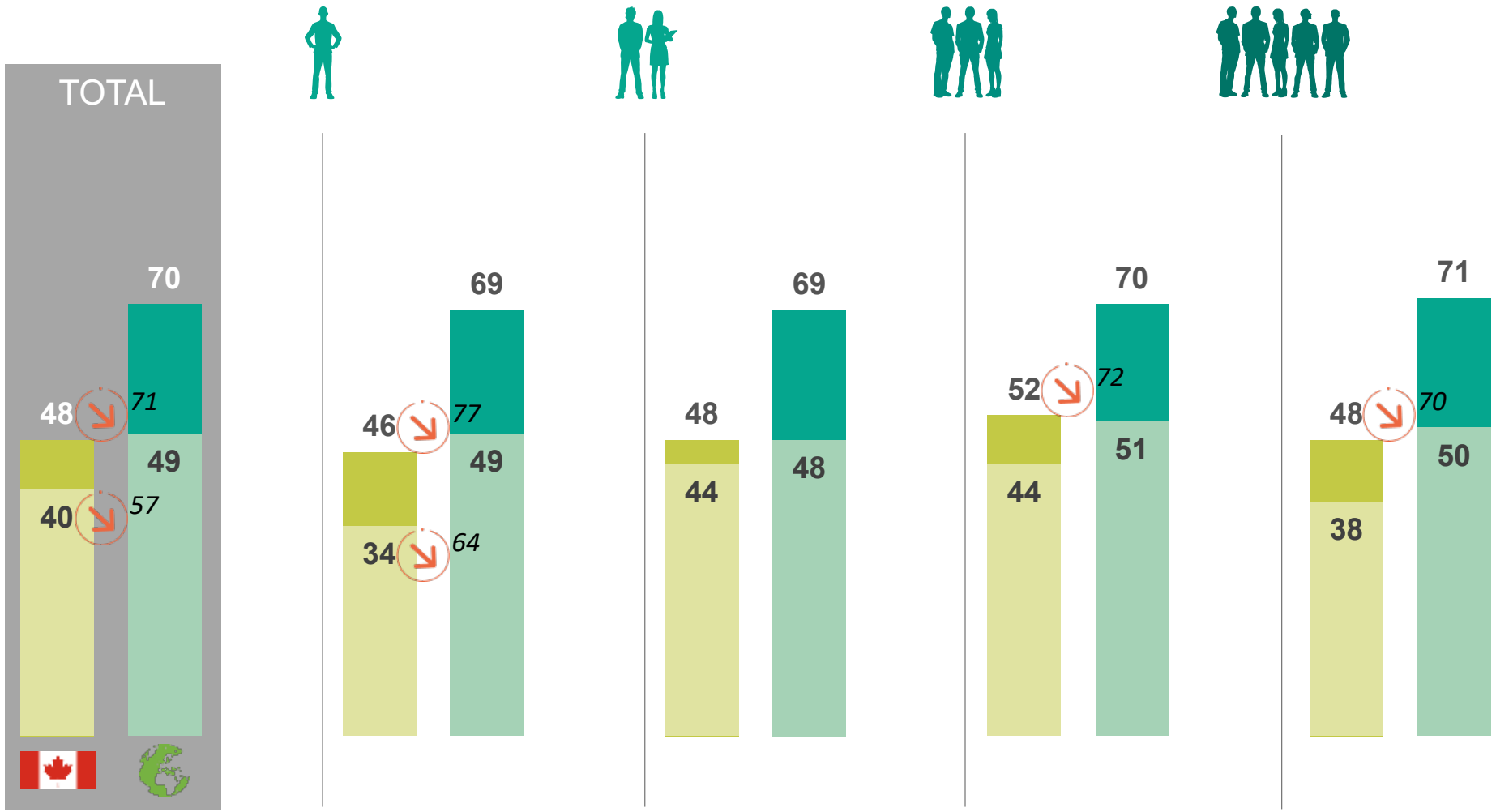
(At least one technology among HEV, PHEV, 100% BEV)

In %

Passenger cars

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

ALREADY USING



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

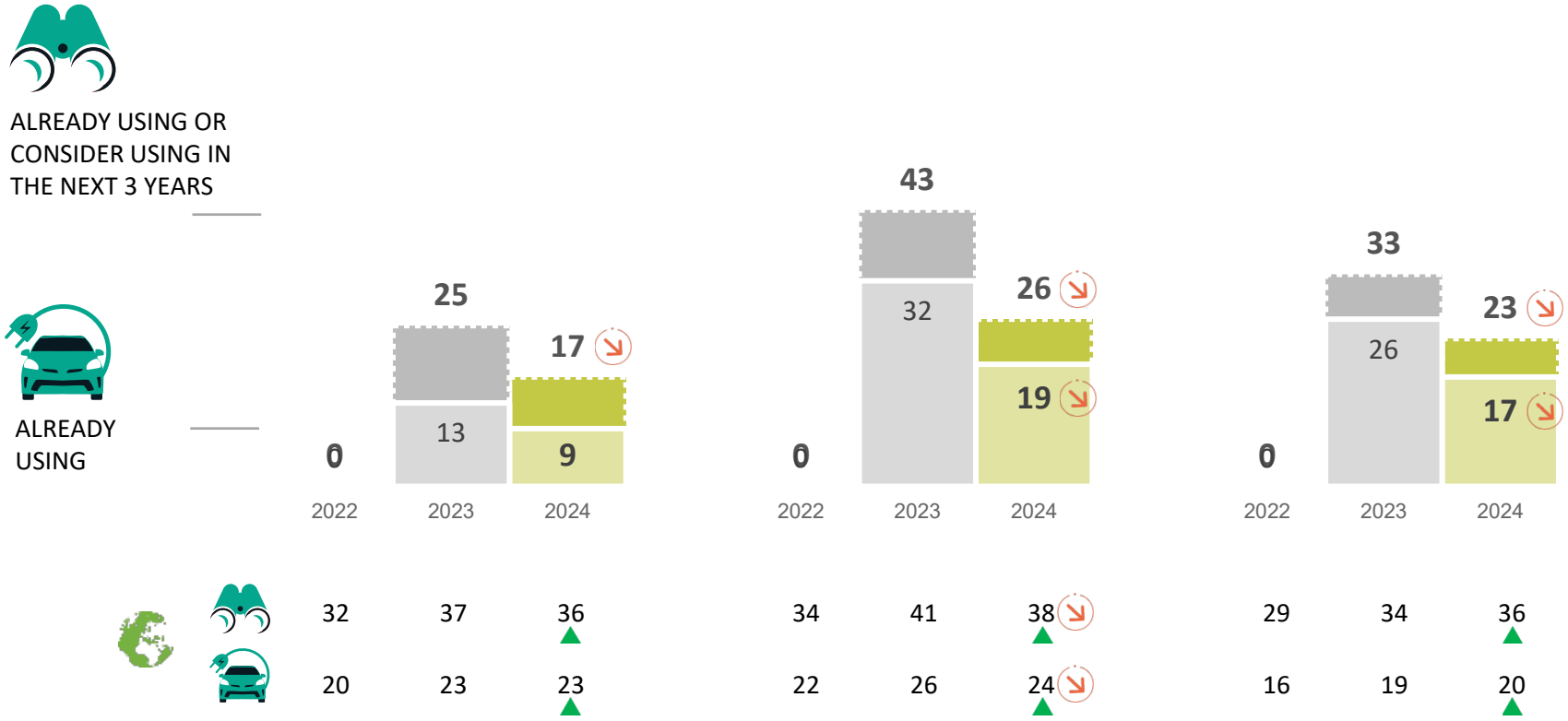
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ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years

In %

Passenger cars



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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ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

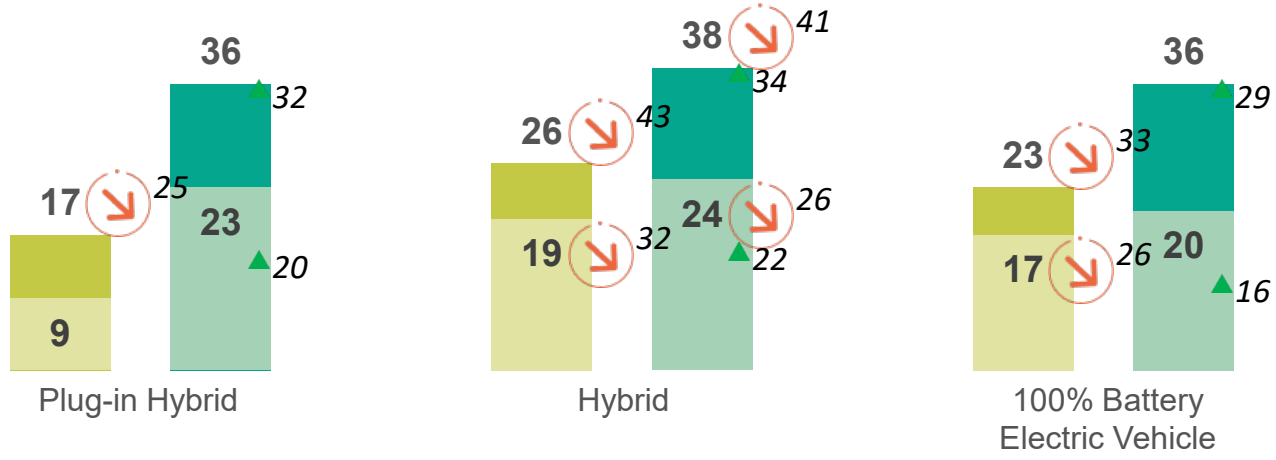
Passenger car fleet

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



Because their total cost of ownership is in line with or lower than petrol or diesel alternatives	51	26
To be able to drive in Low Emission Zone	45 ↗ 29	24 ↗ 21
Because of their lower environmental impact	45	38
To be compliant with your CSR (Corporate Social Responsibility) policy	41	27
To improve your company image	41	27
To reduce fuel expenses	41	32
To fulfil your employees' requests	32	21 ↗ 19
To anticipate future restrictive public policies	16	21 ↗ 18
For tax incentives	15	22

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 %

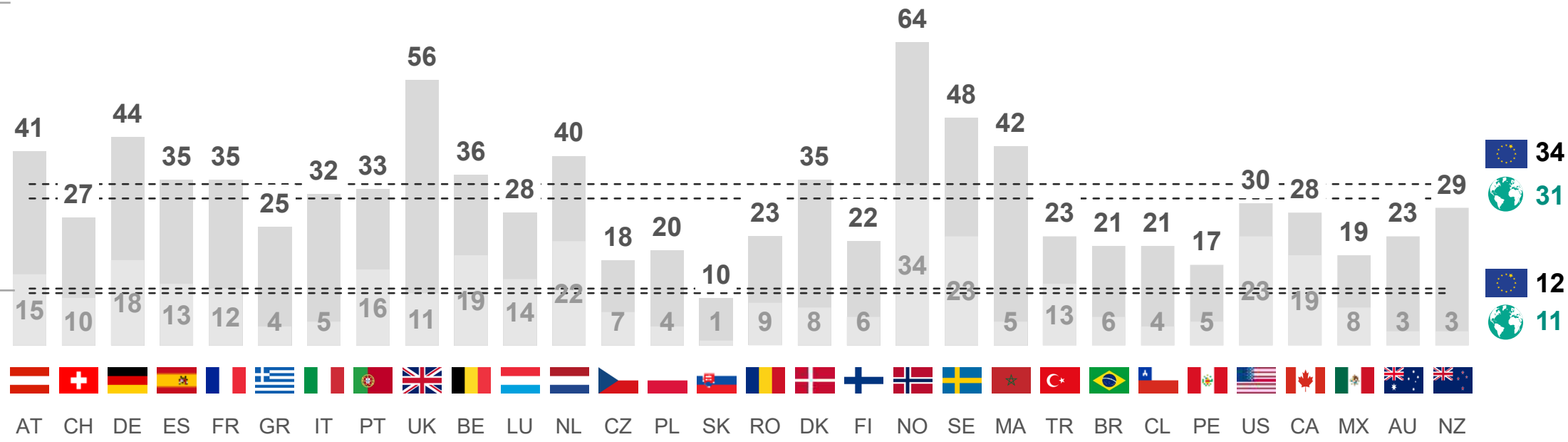
Light trucks

HOW TO READ THE RESULTS ?

In Canada, 28% of the companies are already using or consider to implement at least one alternative technology in the next 3 years. 19% of the companies is currently using at least one.

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

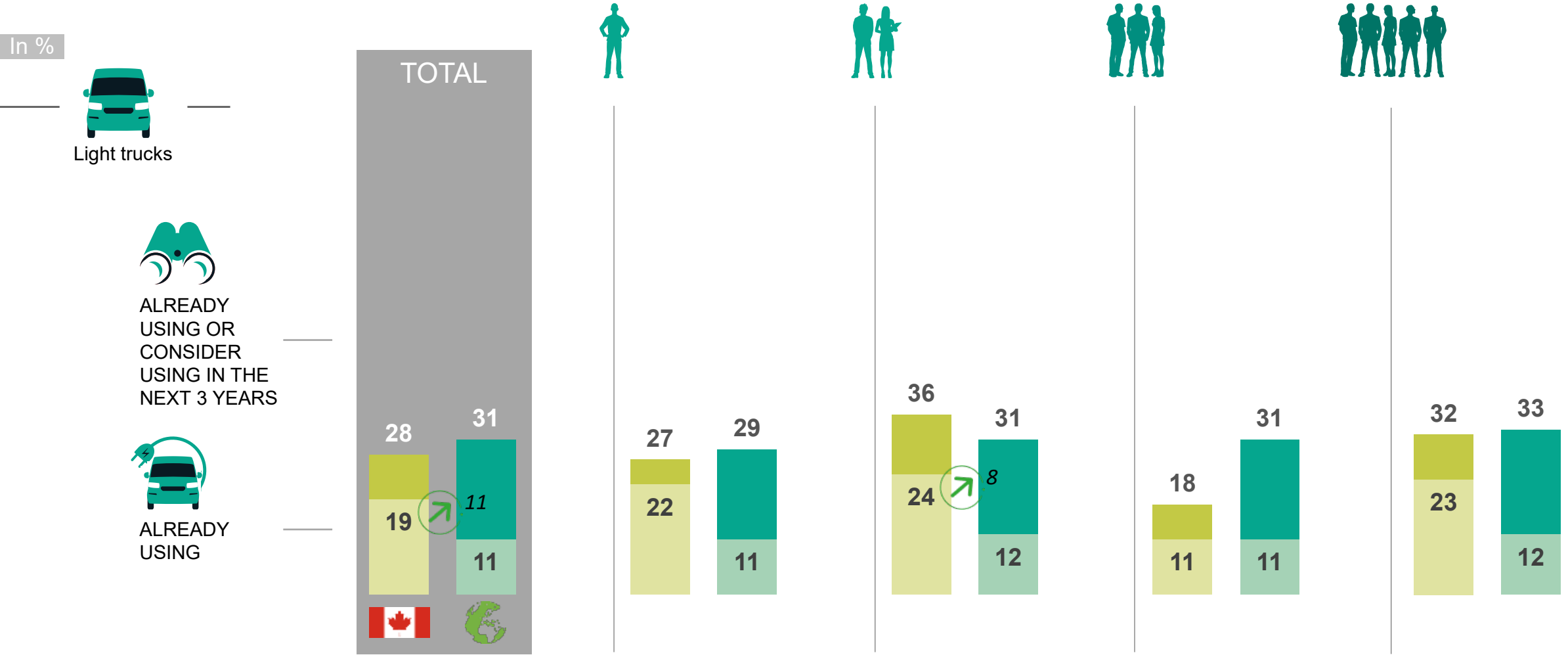
ALREADY USING



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

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 Light trucks

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years

In %

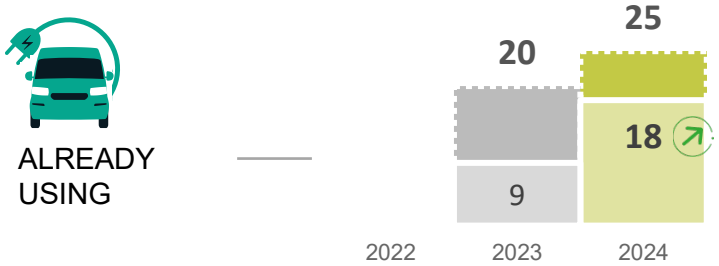
Light trucks

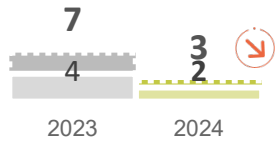
100% Battery Electric Vehicle

Hydrogen Fuel cell

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 Light trucks

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ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

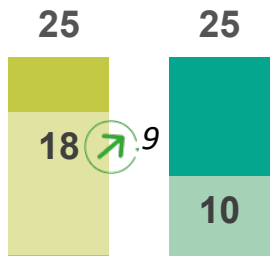
Light truck Fleet

In %

Light trucks

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

ALREADY IMPLEMENTED



100% Battery Electric Vehicle



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 Light trucks

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REASONS FOR IMPLEMENTING OR CONSIDERING ALTERNATIVE FUEL TECHNOLOGIES

Light truck fleet

In %



Light trucks



To be compliant with your CSR (Corporate Social Responsibility) policy	34	22
Because of their lower environmental impact	33	35
To reduce fuel expenses	32 ↘ 53	35
Because their total cost of ownership is in line with or lower than petrol or diesel alternatives	24 ↘ 43	28
To be able to drive in Low Emission Zone	20	20
To anticipate future restrictive public policies	20	20
To improve your company image	19	23
For tax incentives	14	19
To fulfil your employees' requests	11	16

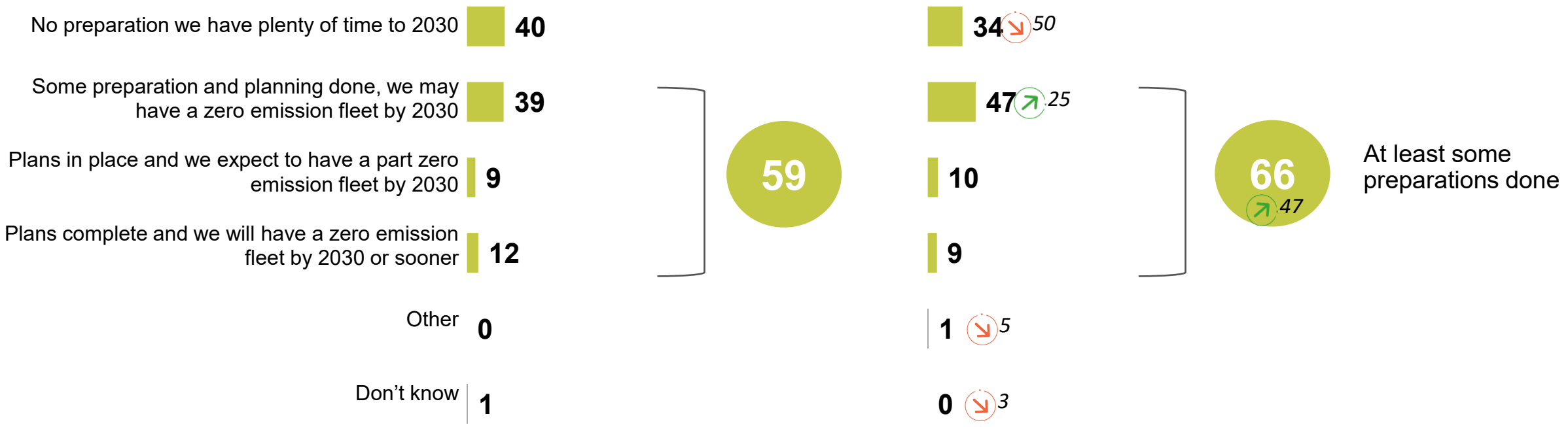
Why have you already implemented or why do you consider implementing alternative fuel technologies?
Basis: companies having implemented or considering 100% Battery Electric Vehicle or Hydrogen Fuel Cell for Light trucks

PREPARATION TO OPERATE ZERO-EMISSION PLAN

In %



Passenger cars + Light trucks



How well are you prepared to operate zero-emission vehicles in response to the Government ban on the sale of new petrol and diesel vehicles in 2030?

A change of ban from 2030 to 2035 was done during the interviews period

Basis: companies with corporate passenger cars / companies with corporate Light trucks

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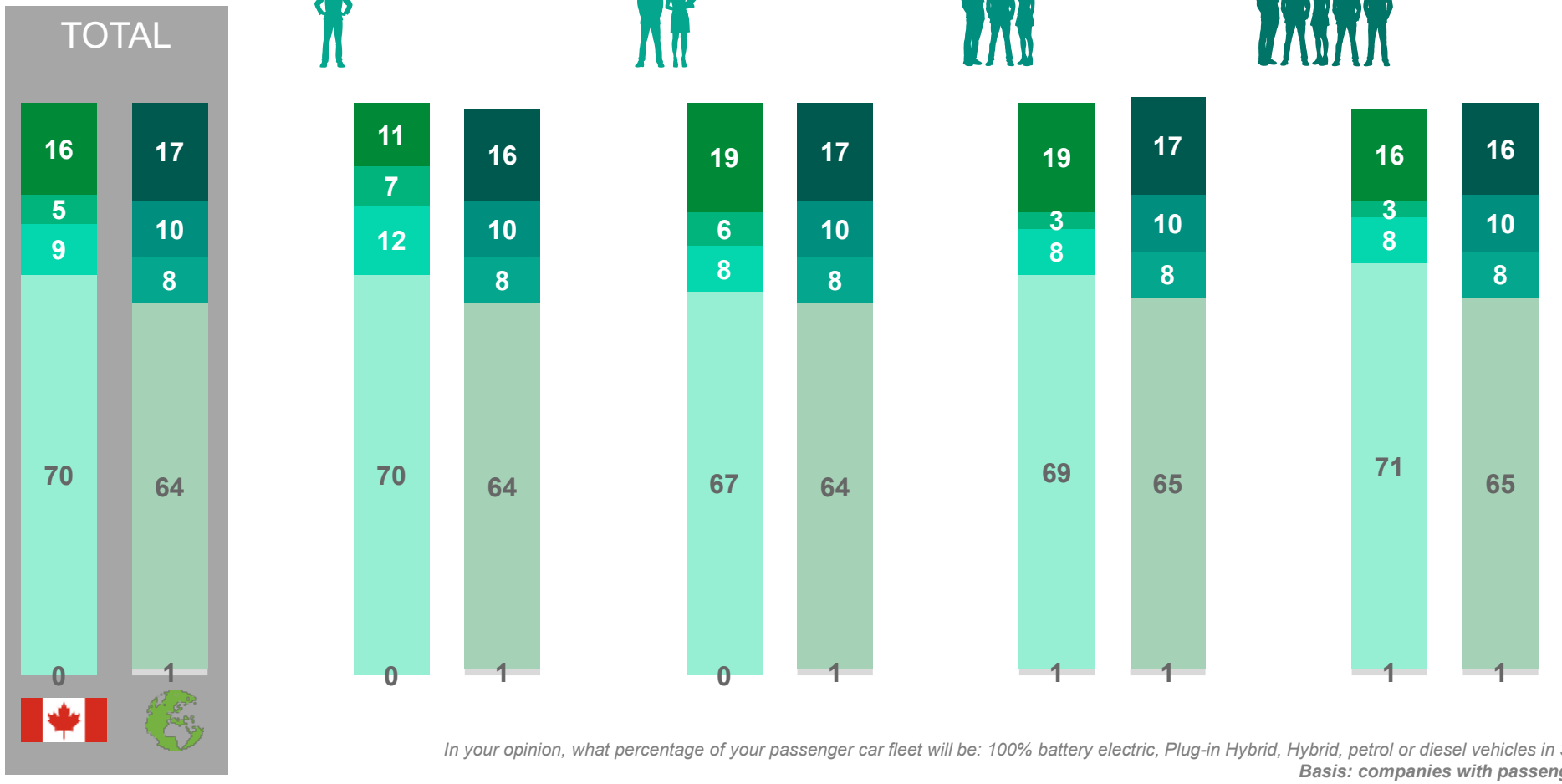
EXPECTED FLEET SHARE PER ENERGY

HOW TO READ THE RESULTS ?

In Canada in 3 years, 16% 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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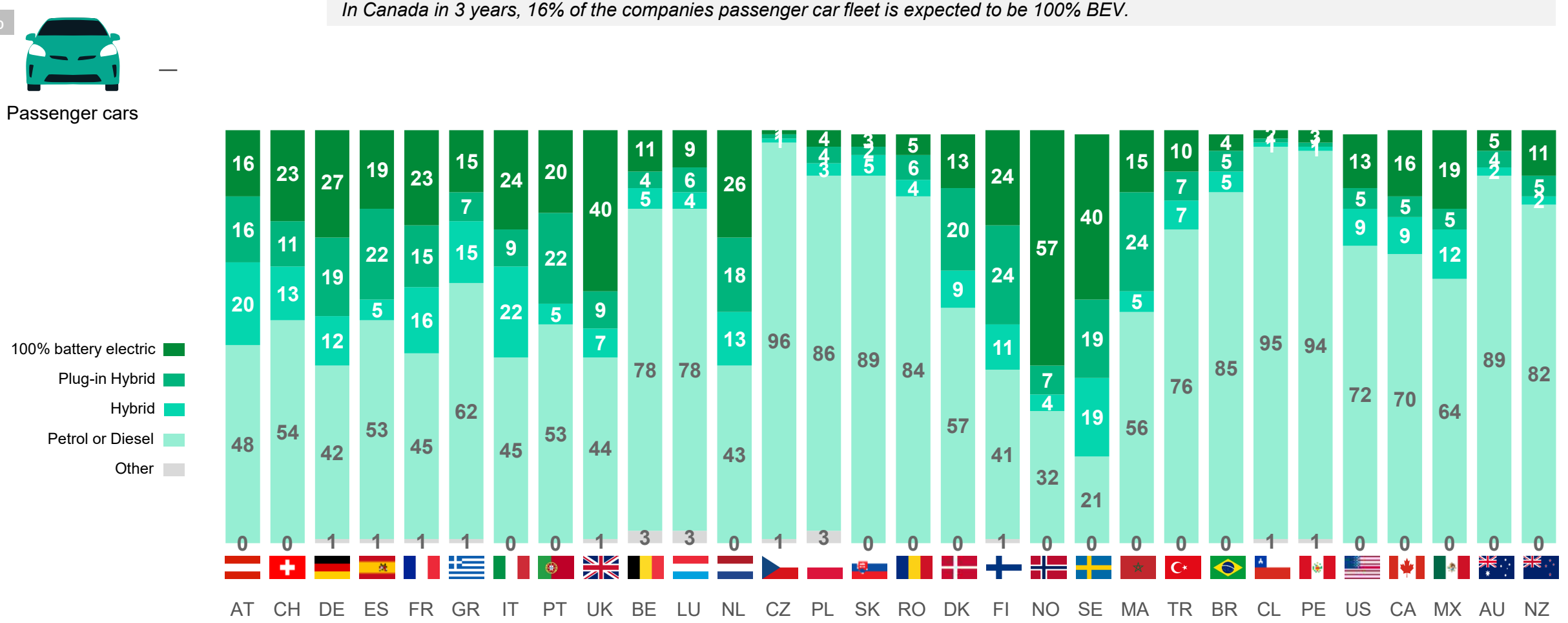
EXPECTED FLEET SHARE PER ENERGY

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In %

Passenger cars



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

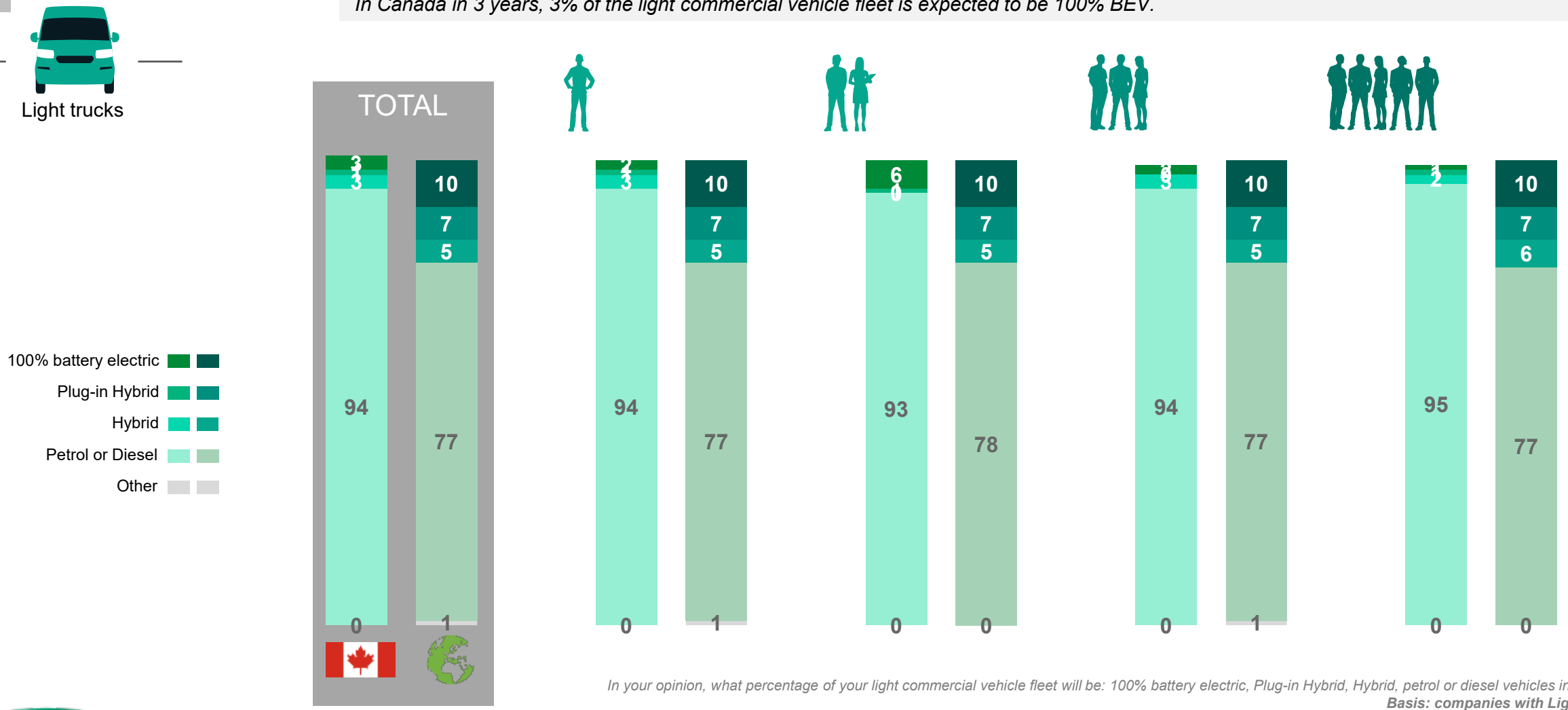
EXPECTED FLEET SHARE PER ENERGY

In %

Light trucks

HOW TO READ THE RESULTS ?

In Canada in 3 years, 3% 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 Light trucks

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ELEMENT-ARVAL GLOBAL ALLIANCE

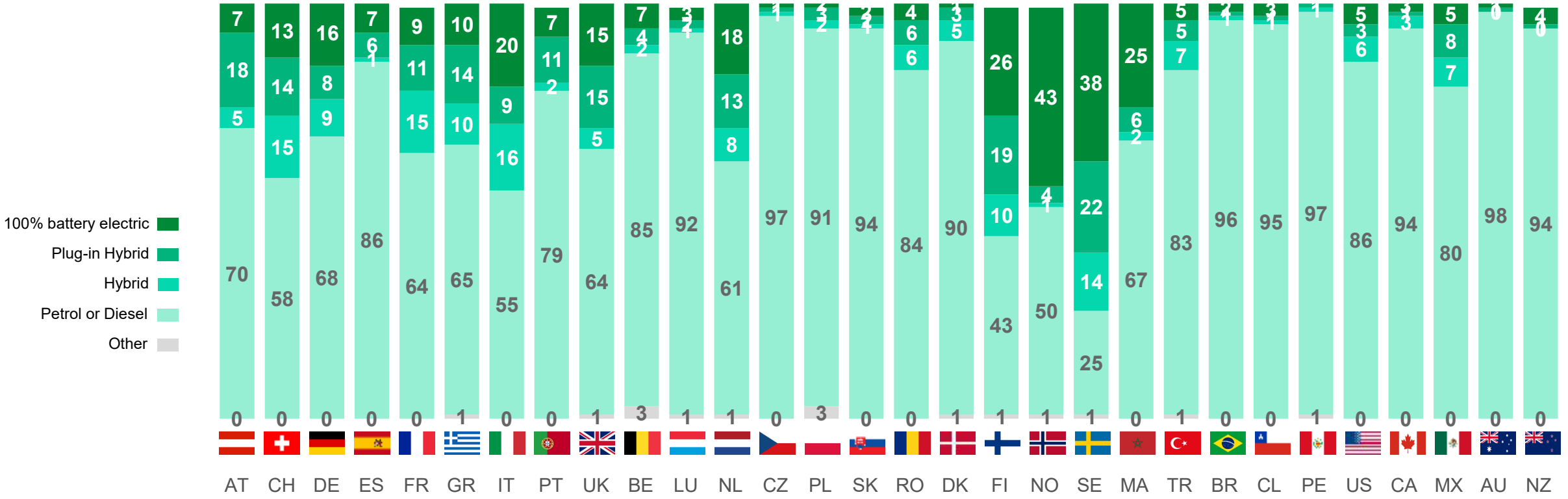
EXPECTED FLEET SHARE PER ENERGY

In %

Light trucks

HOW TO READ THE RESULTS ?

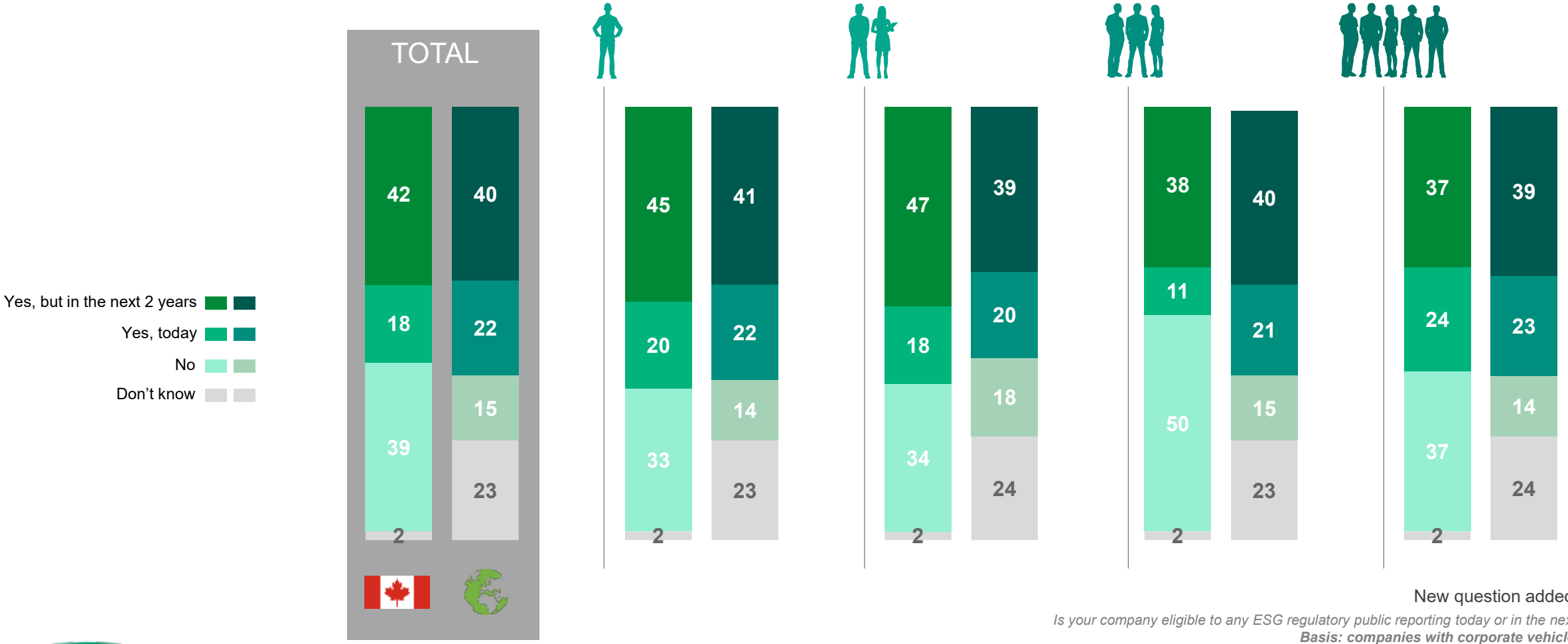
In Canada in 3 years, 3% of the light commercial vehicle fleet is expected to be 100% BEV.



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 Light trucks

ELIGIBILITY TO ESG REGULATORY PUBLIC REPORTING

In %

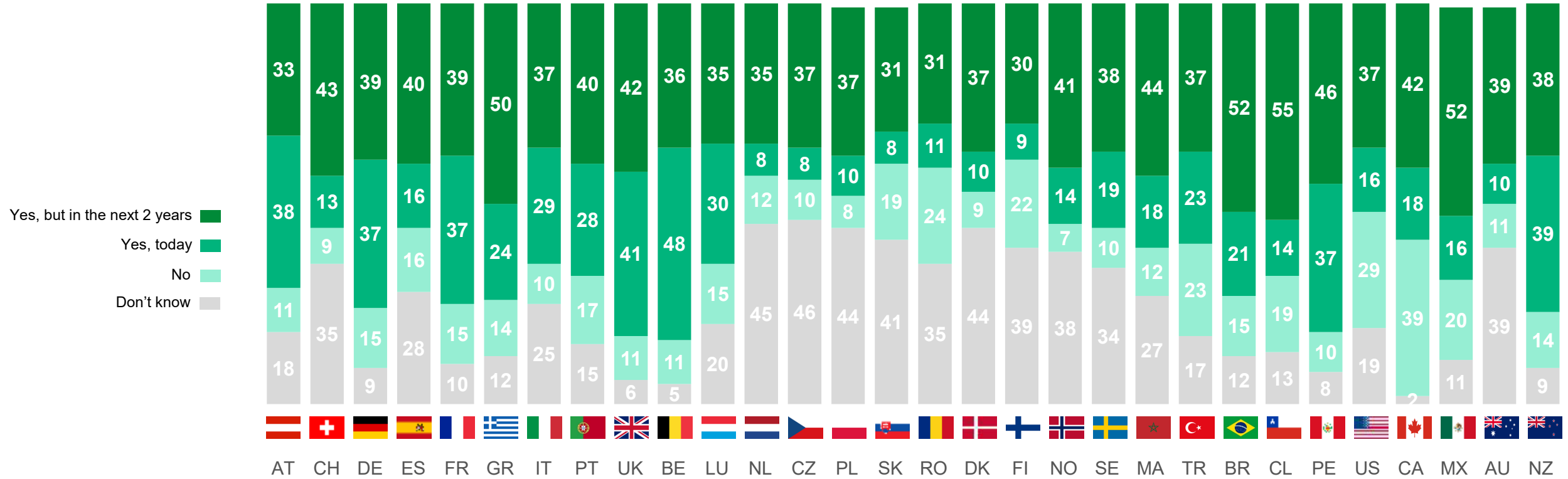


New question added in 2024

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

ELIGIBILITY TO ESG REGULATORY PUBLIC REPORTING

In %

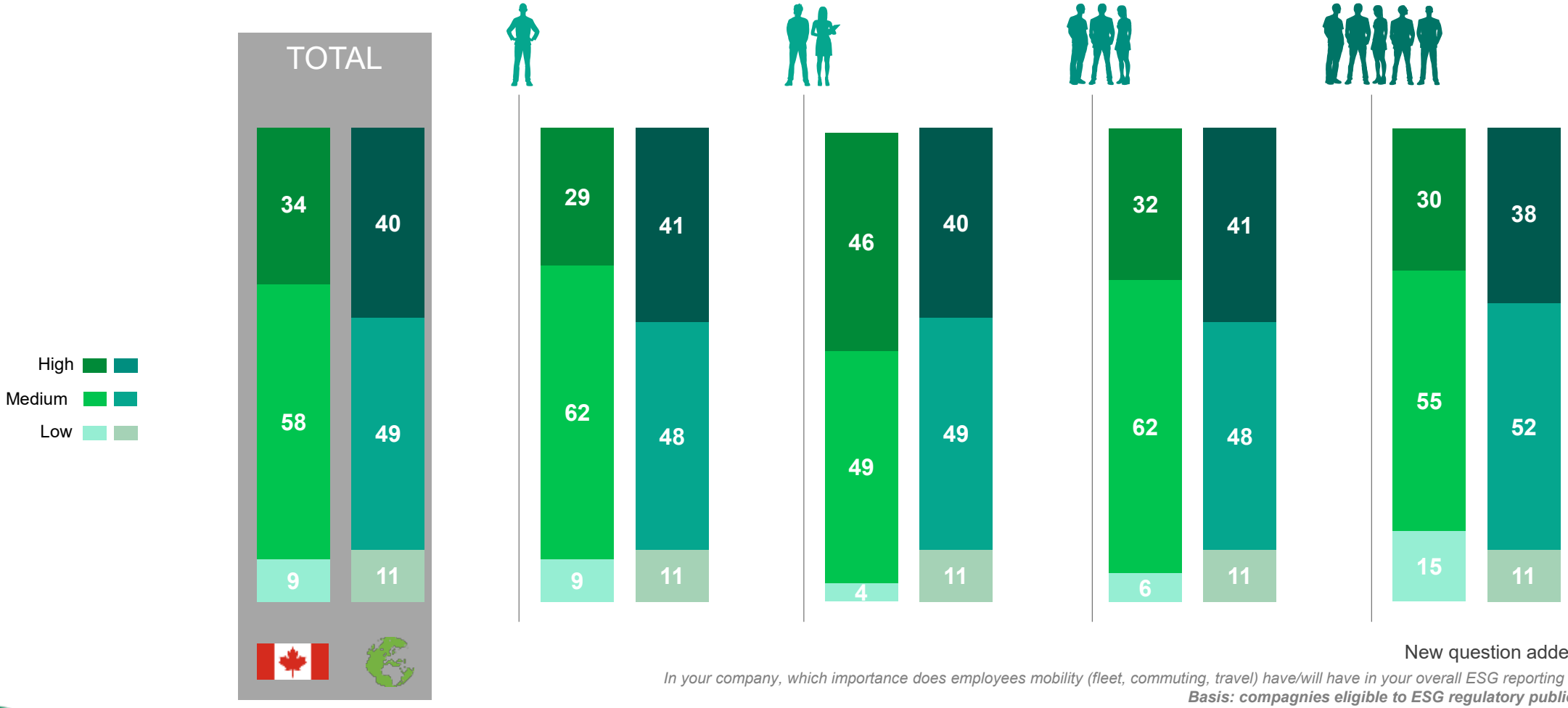


New question added in 2024

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 %

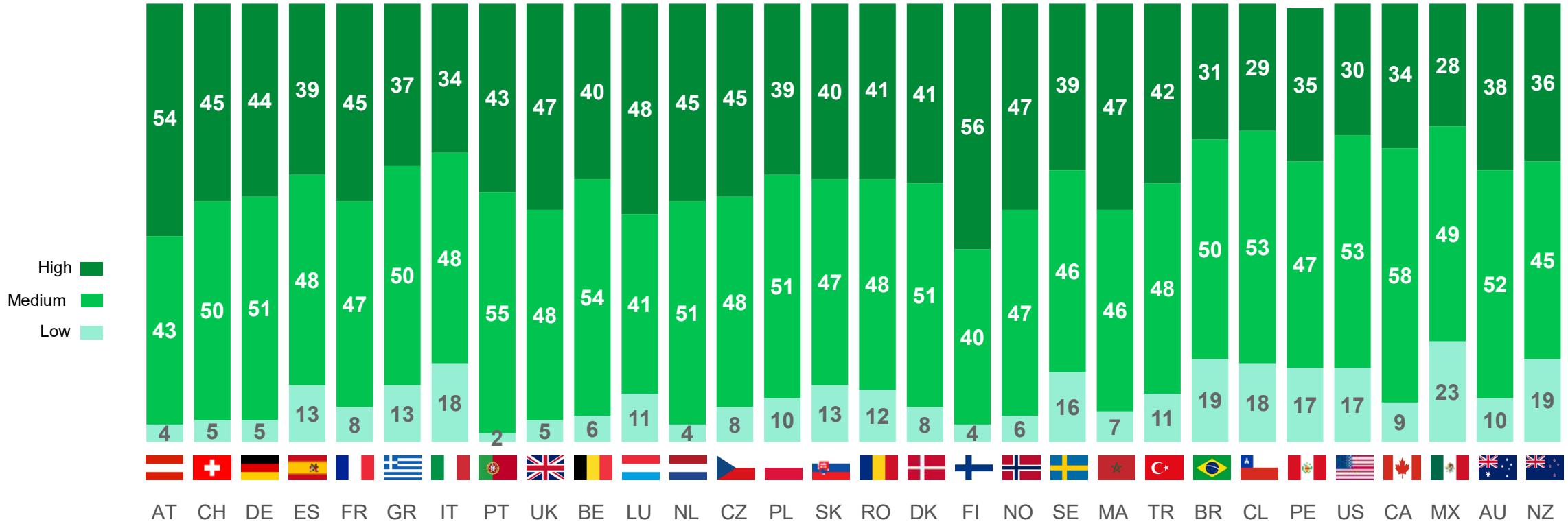


New question added in 2024

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

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5

ENERGY MIX
FOCUS PER ALTERNATIVE TECHNOLOGY



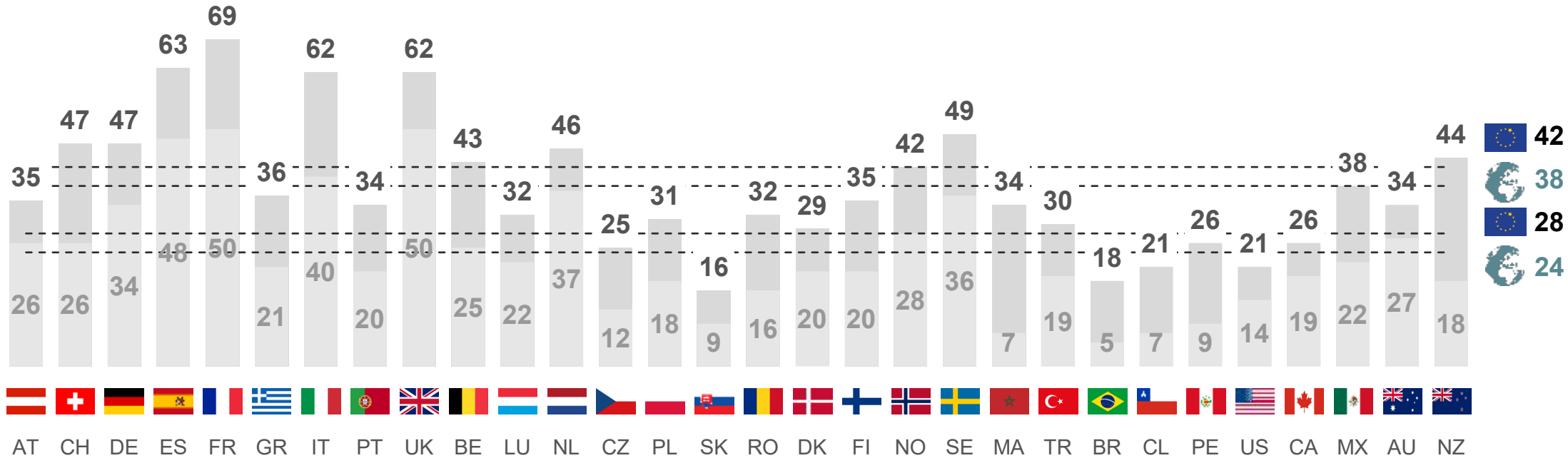
HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

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

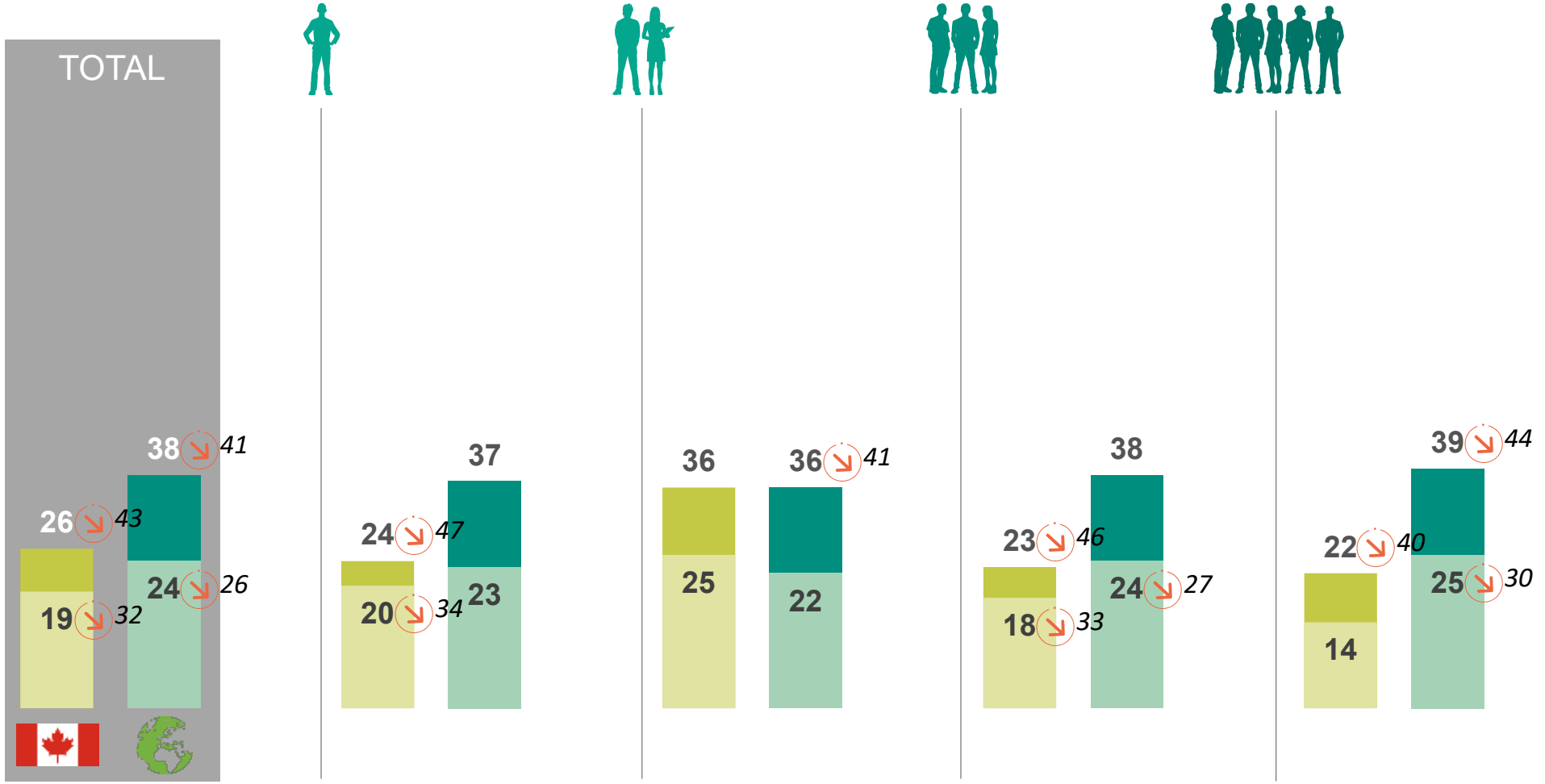
HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

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

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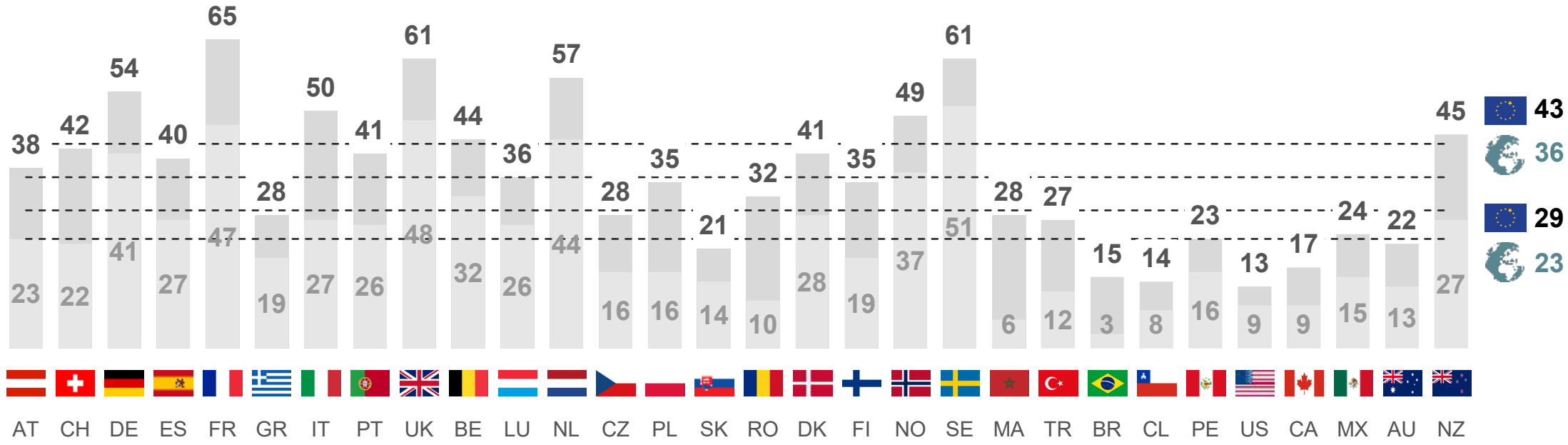
PLUG-IN HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %

Passenger cars

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



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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

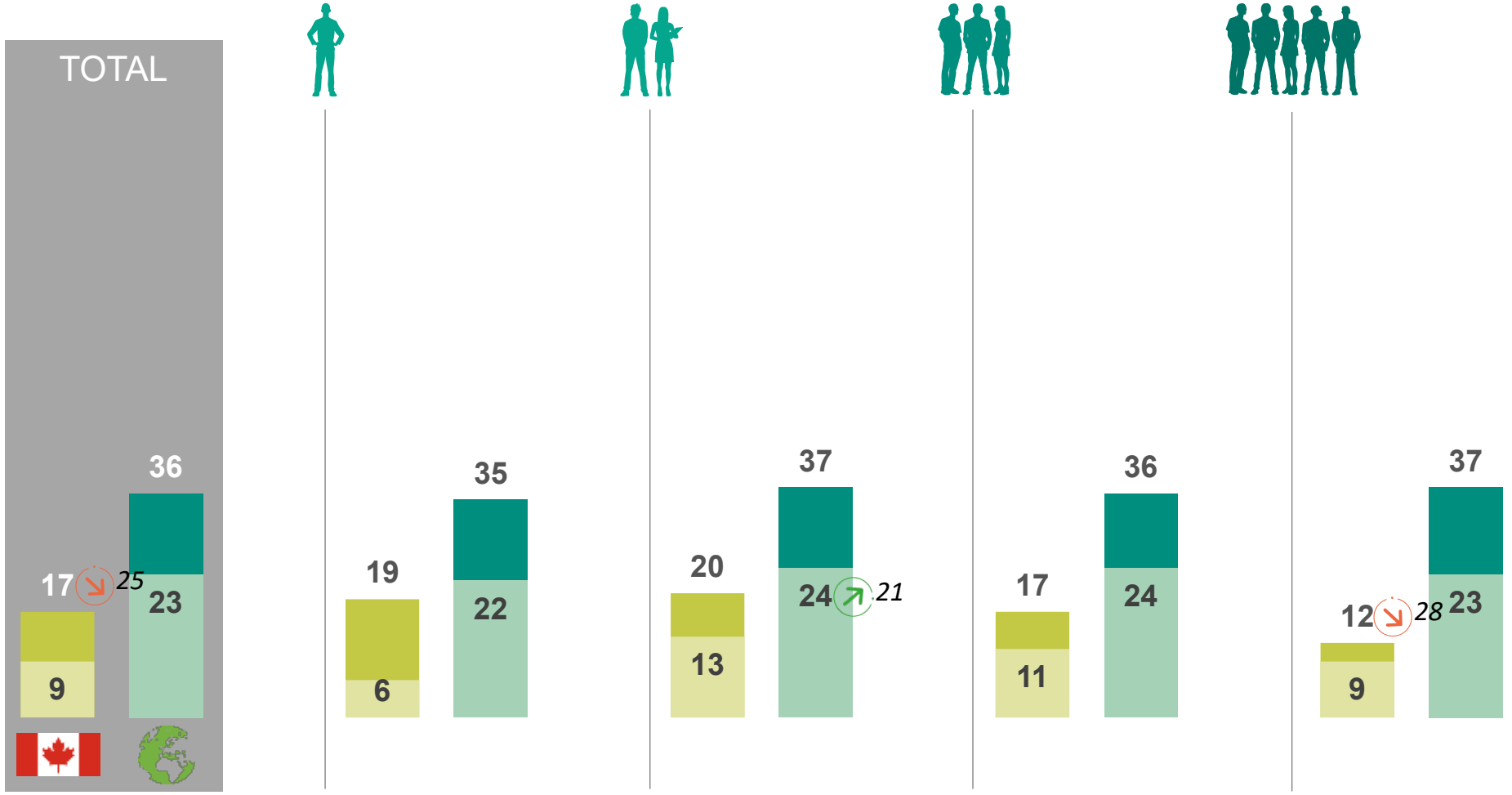
PLUG-IN HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %

Passenger cars

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

ALREADY USING



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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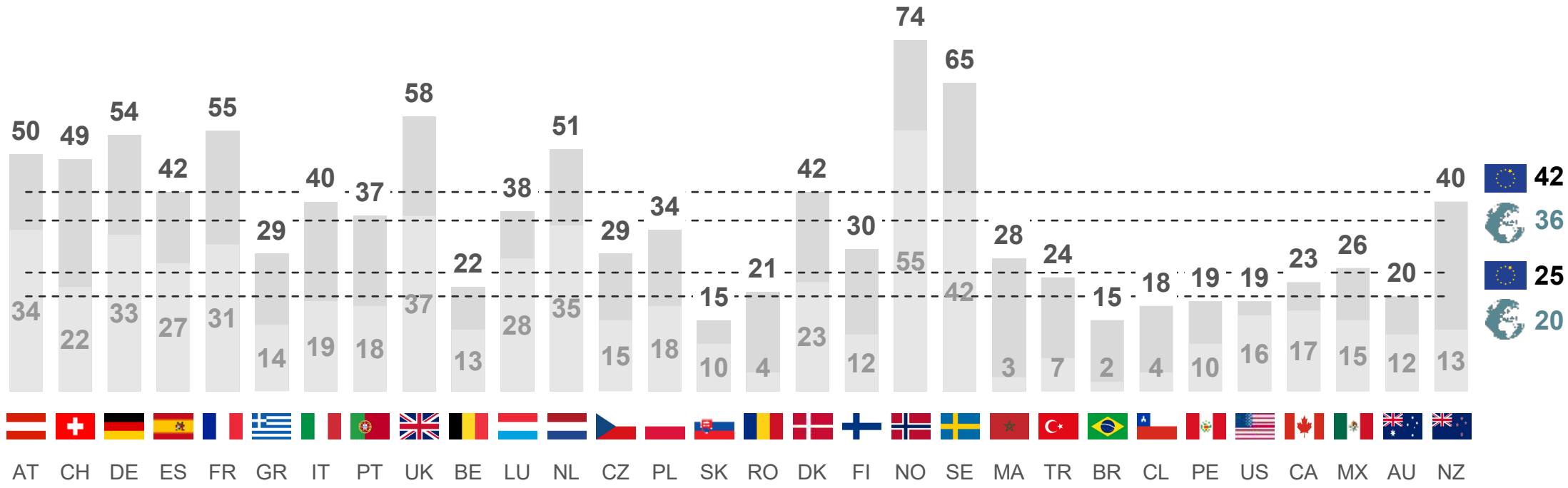
100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %

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

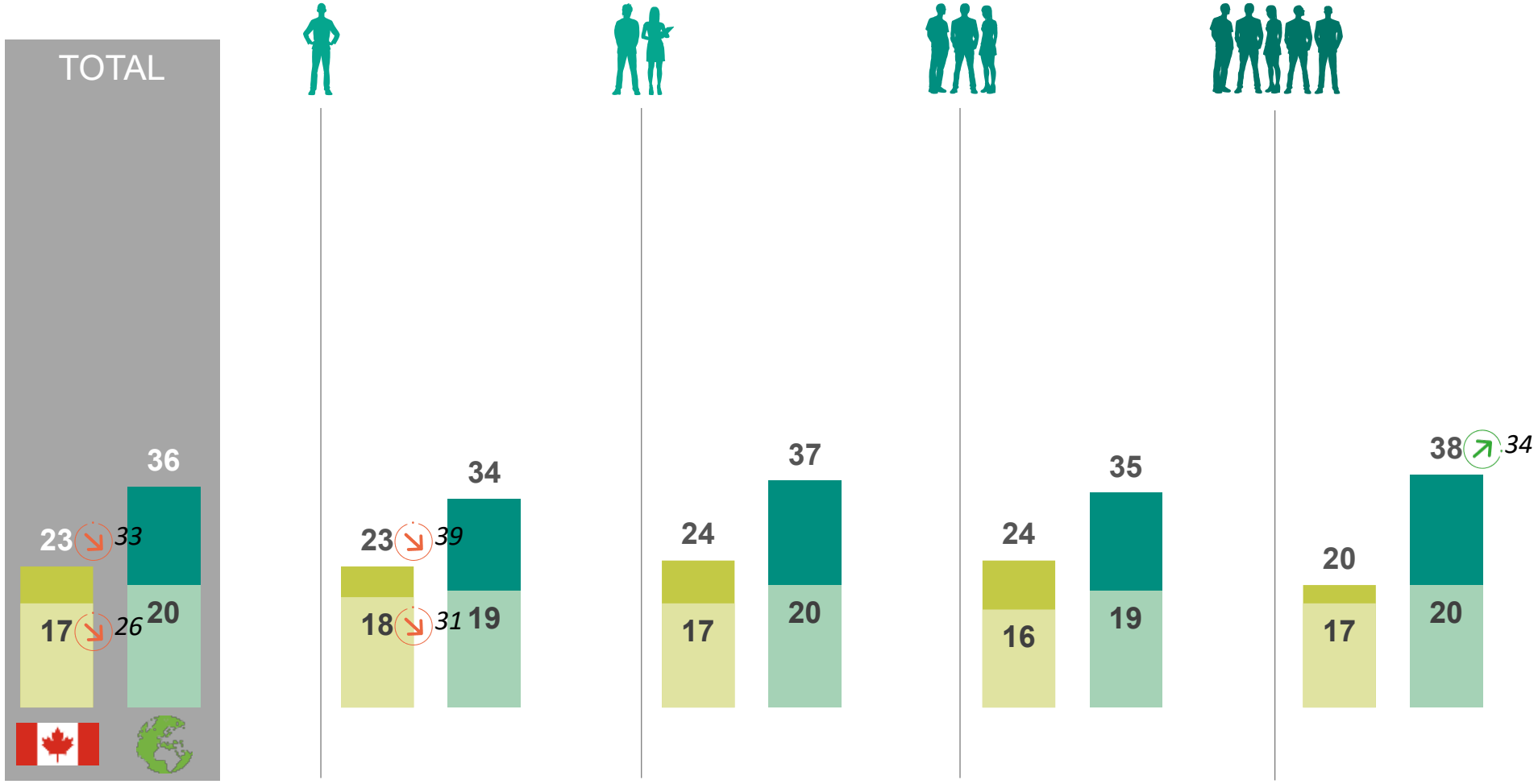
100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

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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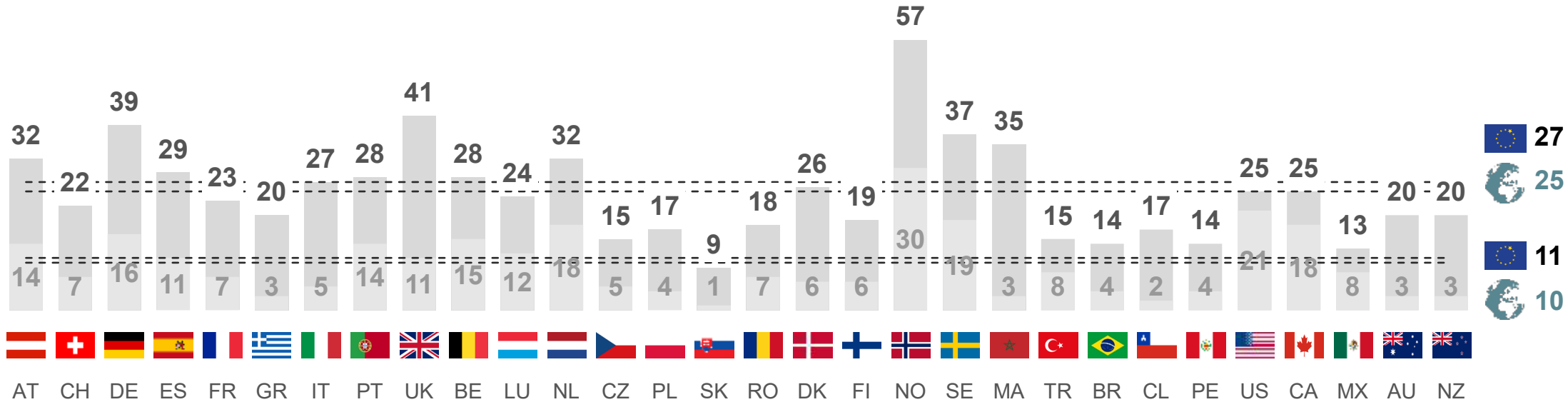
100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %

Light trucks

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 Light trucks

100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %

Light trucks

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 Light trucks

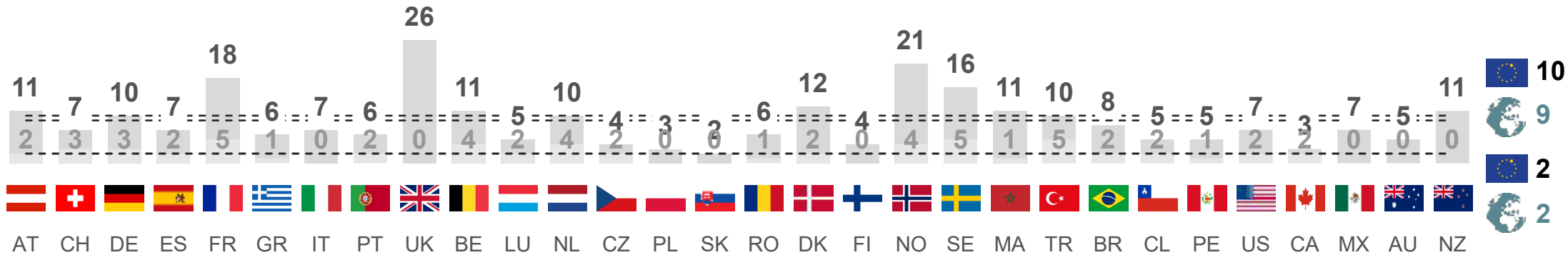
HYDROGEN FUEL CELL ELECTRIC VEHICLE : IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %

Light trucks

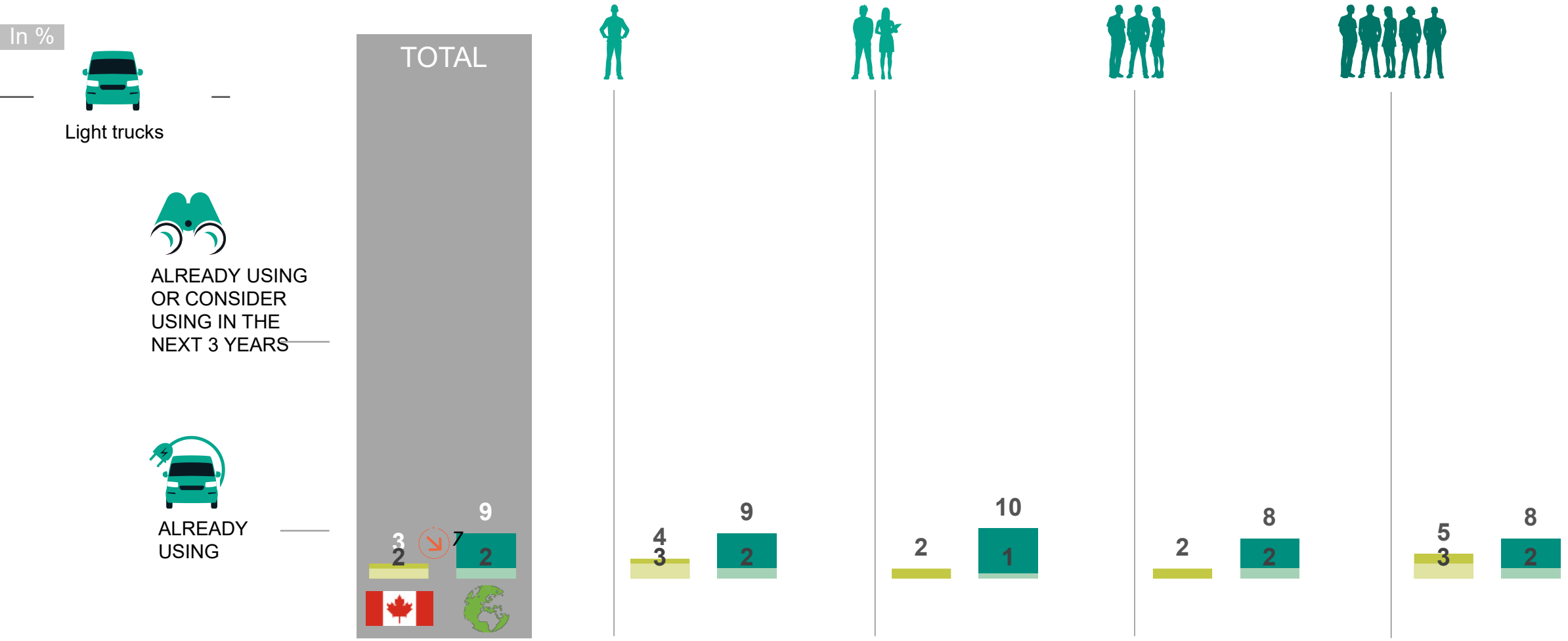
ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

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 Light trucks

HYDROGEN FUEL CELL ELECTRIC VEHICLE : IMPLEMENTATION WITHIN COMPANY FLEET POLICY

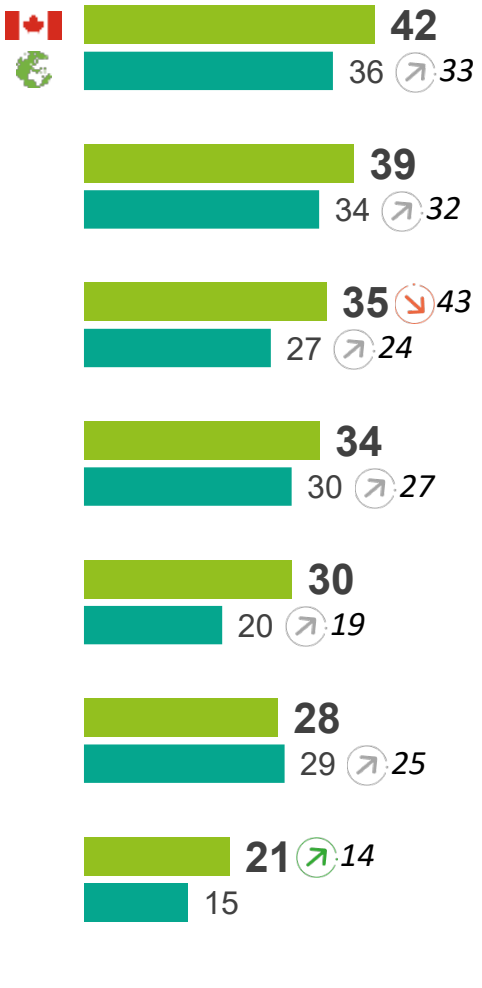


Amongst the following alternative fuel technologies, which ones do you currently use…?
Amongst the following alternative fuel technologies, which ones are you considering using…?
Basis: companies with Light trucks

CONSTRAINTS OF 100% BATTERY ELECTRIC VEHICLE USAGE

In %

Passenger cars + Light trucks

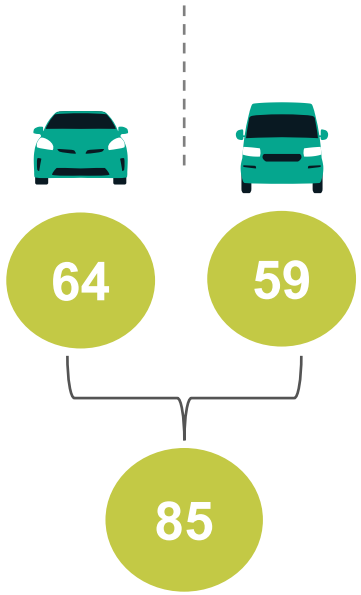


What are the constraints of using 100% Battery Electric vehicles?
Basis: Know 100% BEV technology

CONSTRAINTS OF 100% BATTERY ELECTRIC VEHICLE USAGE

In %

Passenger cars + Light trucks do not consider implementing battery electric vehicles



Not enough public charging points	39 / 35
The purchase price is higher than a regular fuel car	39 / 35
No charging points at your company offices	33 / 31 (29)
The range of models is limited for this type of vehicles	33 (44) / 28
The questions raised on their reliability	30 / 21
No charging solutions at your employees' home	29 / 29 (25)
Your employee's reluctance to drive electric vehicles	21 / 16

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

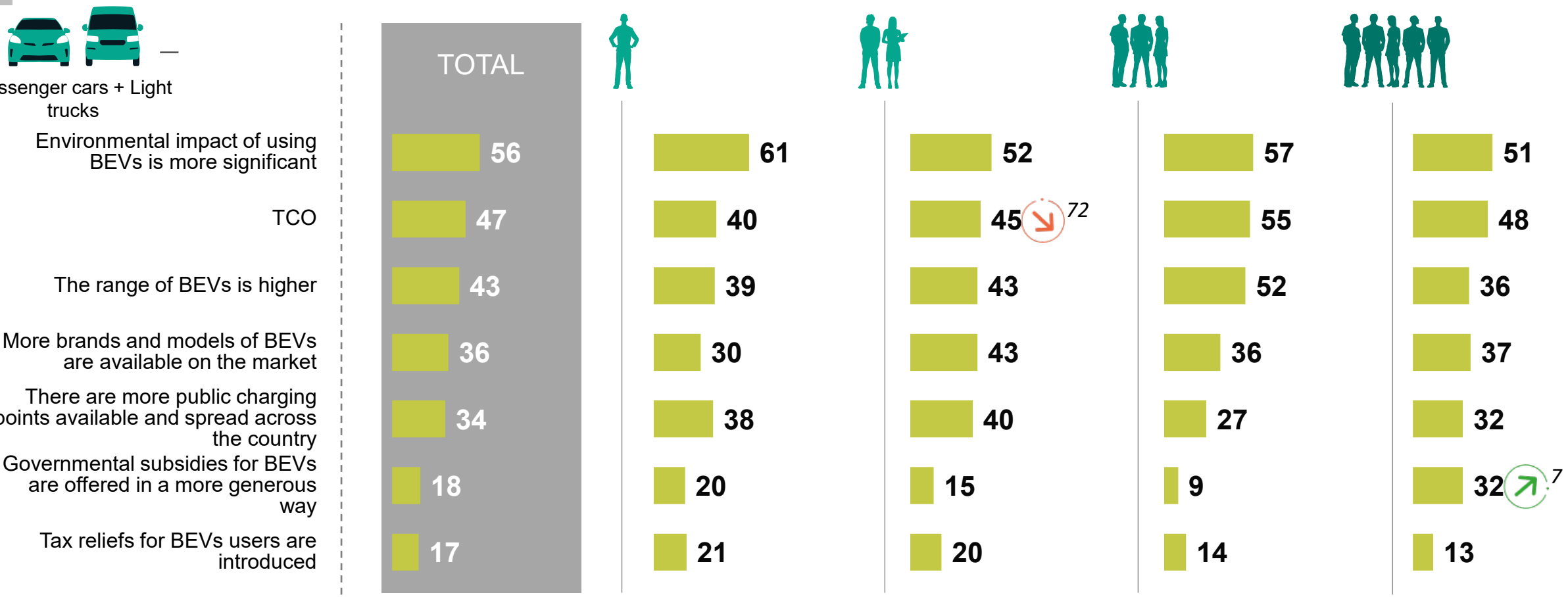
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MAIN REASONS TO START ORDERING MORE BEVS

In %

Passenger cars + Light trucks



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 + Light trucks

	TOTAL				
Currently no charging points installed at the company premises	43 / 47 (42)	44 / 47 (42)	36 / 47 (43)	52 / 47 (43)	36 / 46 (40)
Charging points are planned to be installed at the company premises in the next 12 months	33 (18) / 30	36 / 30	41 / 29	34 / 31	17 / 29
Company subsidises cost of home installations of charging points for drivers	18 (10) / 20 (16)	17 / 19	14 / 21 (14)	18 / 19 (16)	26 / 21
Charging points installed at the company premises and free charging for drivers	18 / 13 (15)	22 / 12 (15)	19 / 14	6 / 12	27 / 13
Drivers have to pay for home installation of charging points	18 / 26	19 (6) / 25	16 / 25	15 / 26	23 / 27
Charging points installed at the company premises and drivers charged for charging	16 / 7	11 / 7	21 / 7	18 / 6	18 / 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 Light truck

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EQUIPMENT IN CHARGING POINTS

In %



Passenger cars + Light trucks

Already equipped

Already equipped or consider

	TOTAL				
Your company premises	10 / 47	10 / 48	11 / 45	7 / 43	11 / 52
Your employees` homes	6 / 39	3 / 45	6 / 37	9 / 34	5 / 35

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 + Light trucks



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

#1	Car or cash allowance	14% (23)	17%
#2	A short or mid term rental vehicle to provide mobility for an employee	13% (24)	17%
#3	Mobility Budget: a predefined budget provided by the company that allows employees to choose their mode of transport.	9% (16)	15%

TOP 3 POTENTIAL NEXT 3 YEARS

#1	Car or cash allowance	25% (34)	28%
#2	Mobility Budget: a predefined budget provided by the company that allows employees to choose their mode of transport.	23%	28%
#3	Corporate car sharing: where an employee can make a vehicle reservation via an external solution	23%	23%

LIMITED ADOPTION OF MOBILITY SOLUTIONS, CORPORATE VEHICLES BEING ESSENTIAL BUSINESS TRANSPORT TOOLS

1

4 out of 10 companies have adopted mobility solutions (3 out of 10 among the largest ones) – quite below the 75% global average. They are mostly seen as add-ons to corporate vehicles, which are still seen as essential business transport tools. Furthermore, half of the Canadian companies have policies in place for cars that are owned by employees but used on business.

Cash or car allowance (14%) and short or mid-term rental vehicles (13%) are the mobility solutions adopted the most, but still too a low extent.

2

HR related needs (talent recruitment, employees retainment), improvement in the companies' image and tax incentives are the main **reasons for implementing mobility solutions** by the Canadian companies.

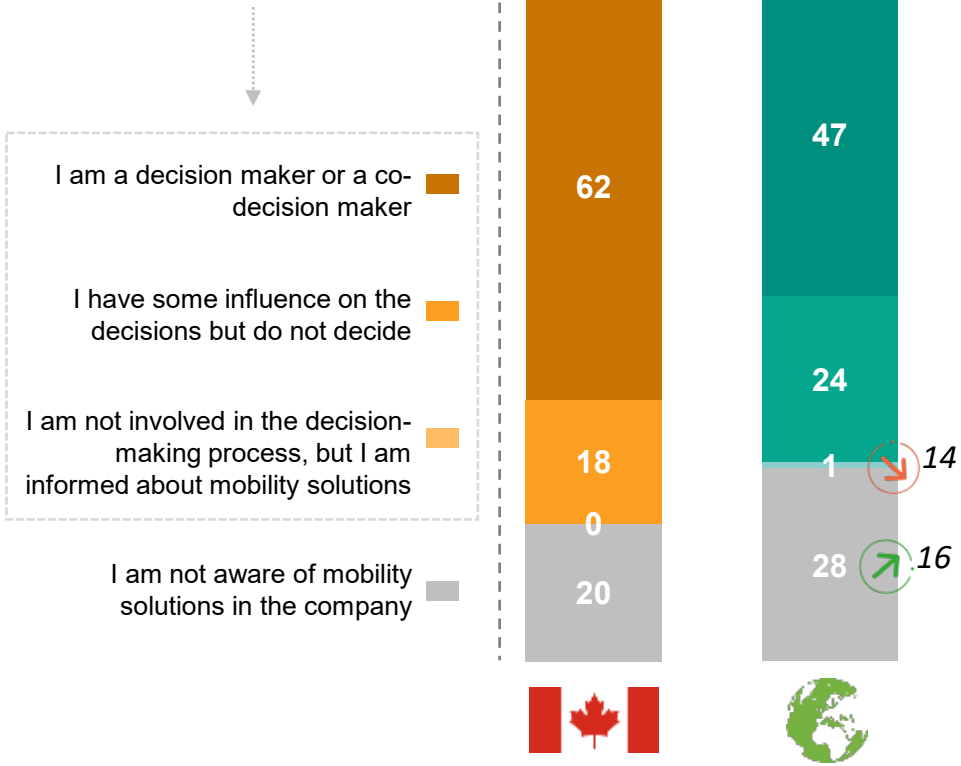
3

Employees mobility is seen as a strategic factor by 1 out of 4 companies.

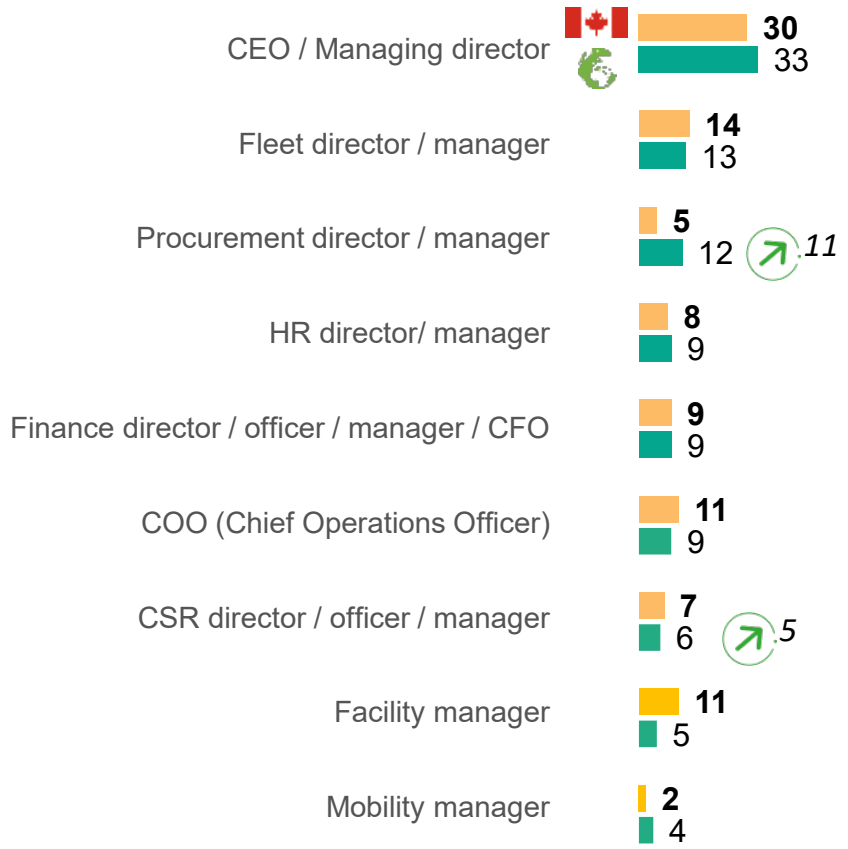
MOBILITY SOLUTION DECISION MAKERS

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

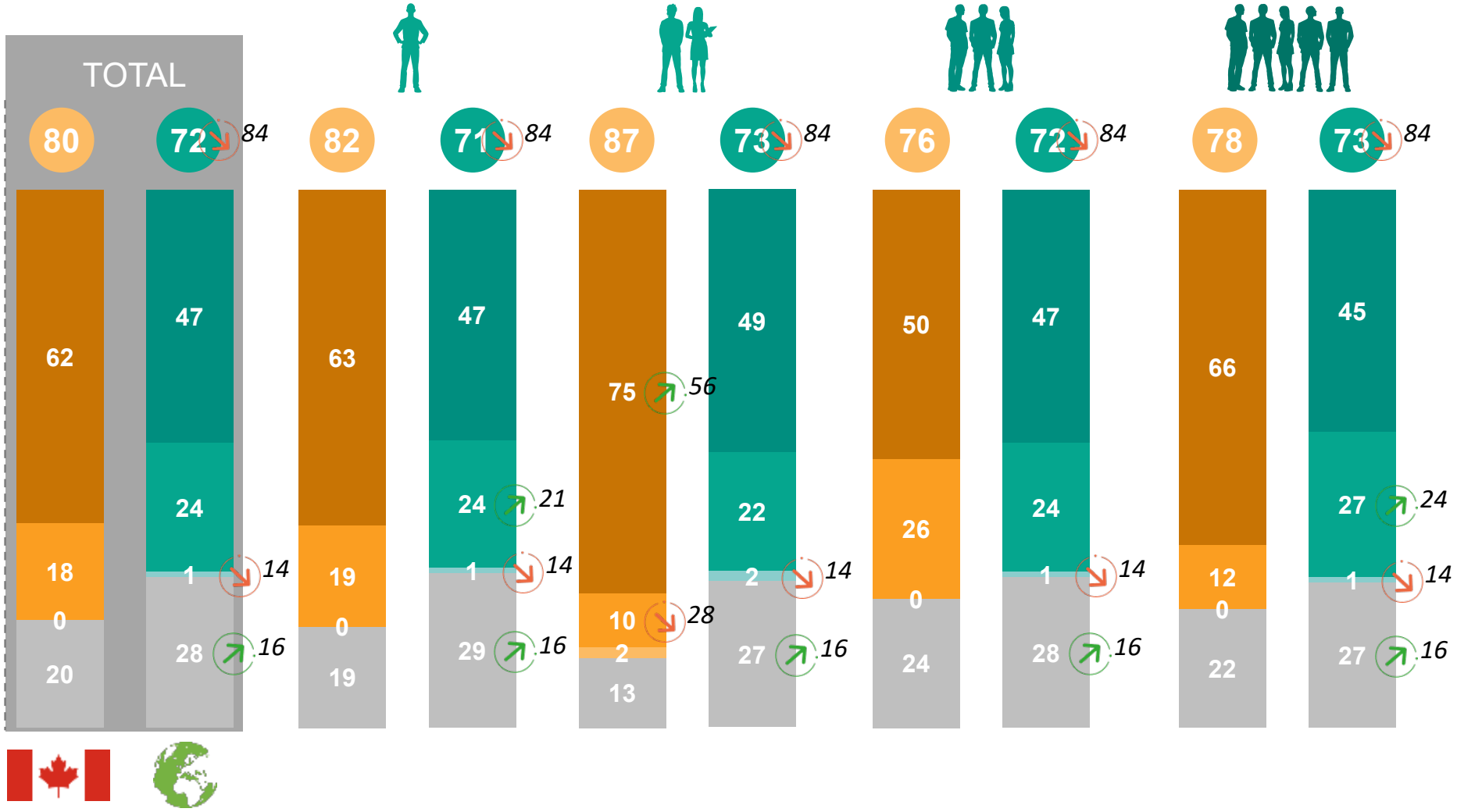


To what extent are you informed about mobility solutions using other modes of transportation than company cars (such as car sharing , bike sharing etc….)
What is the position of the person who decides on mobility solutions in your company??
Basis: companies with corporate vehicles = 100%

RESPONDENTS INVOLVEMENT IN MOBILITY SOLUTION DECISIONS

In %

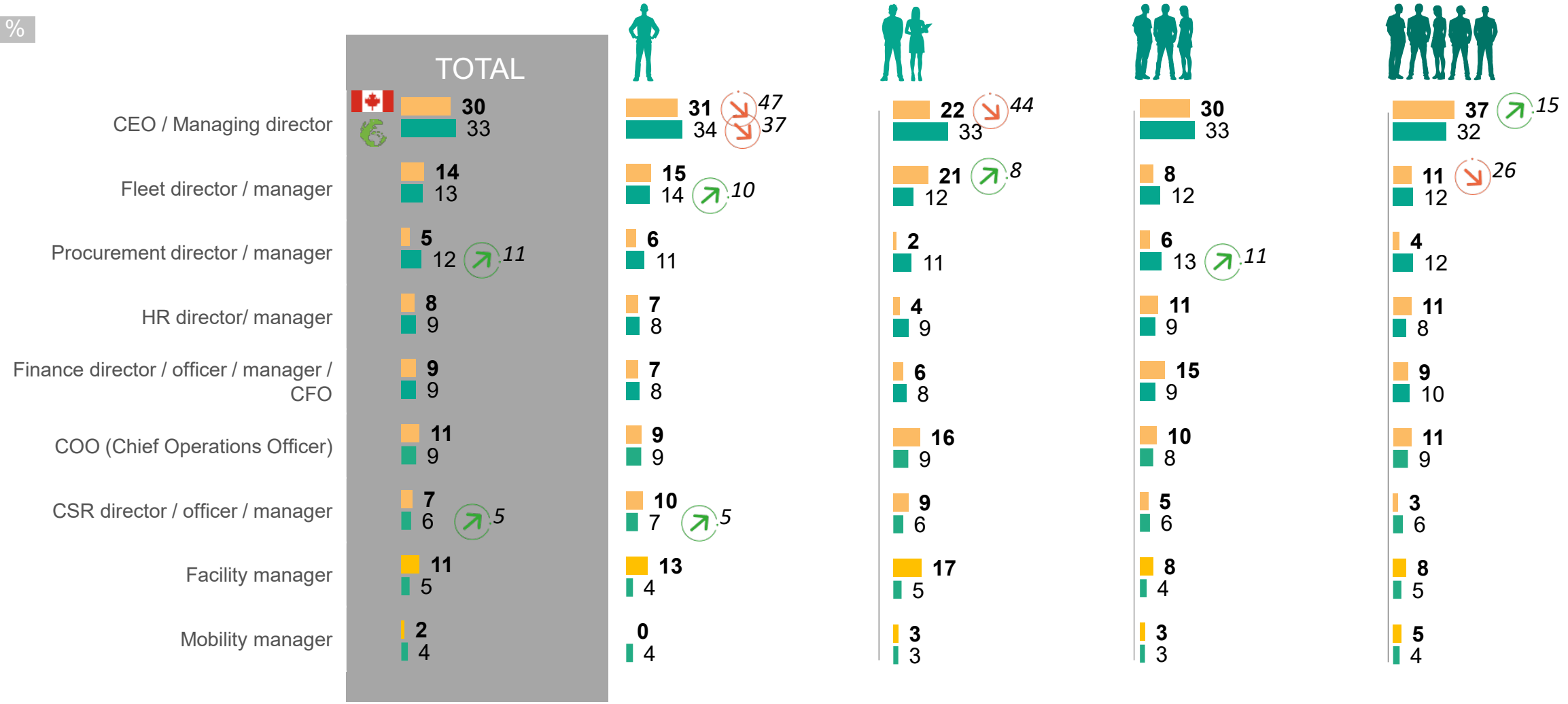
NET ARE AWARE OF MOBILITY SOLUTIONS
(Decision maker, influencer or informed)



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 %



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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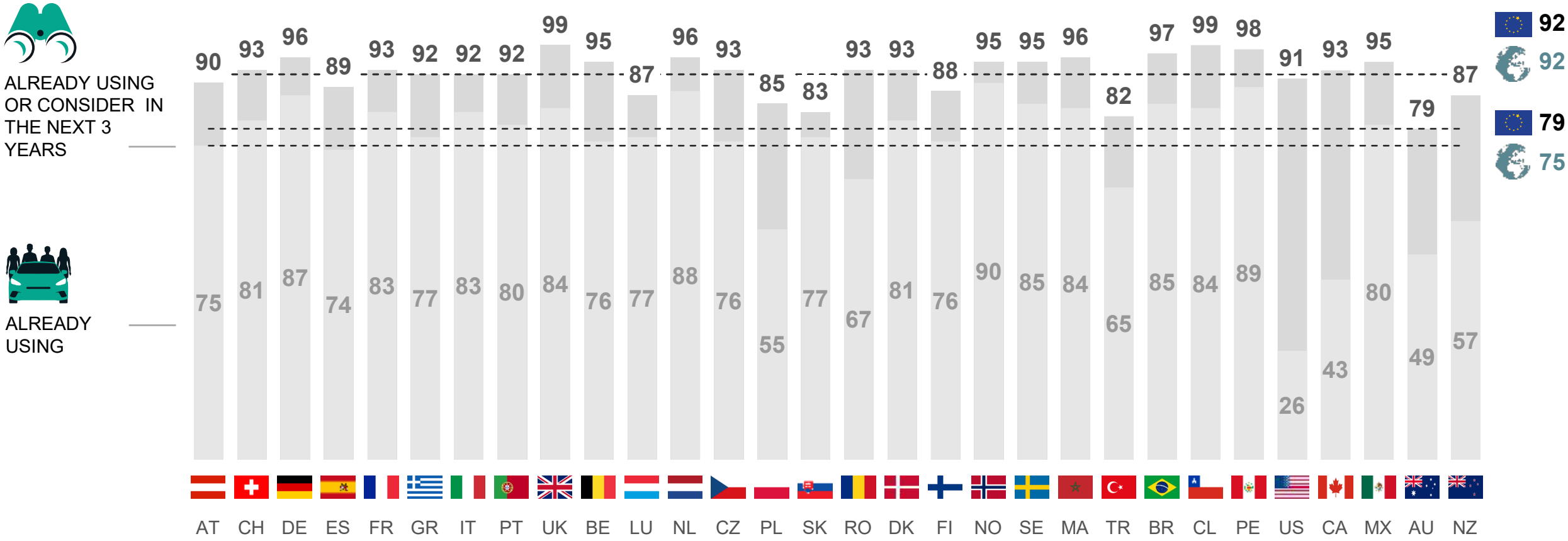
MOBILITY SOLUTIONS IMPLEMENTATION

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 %



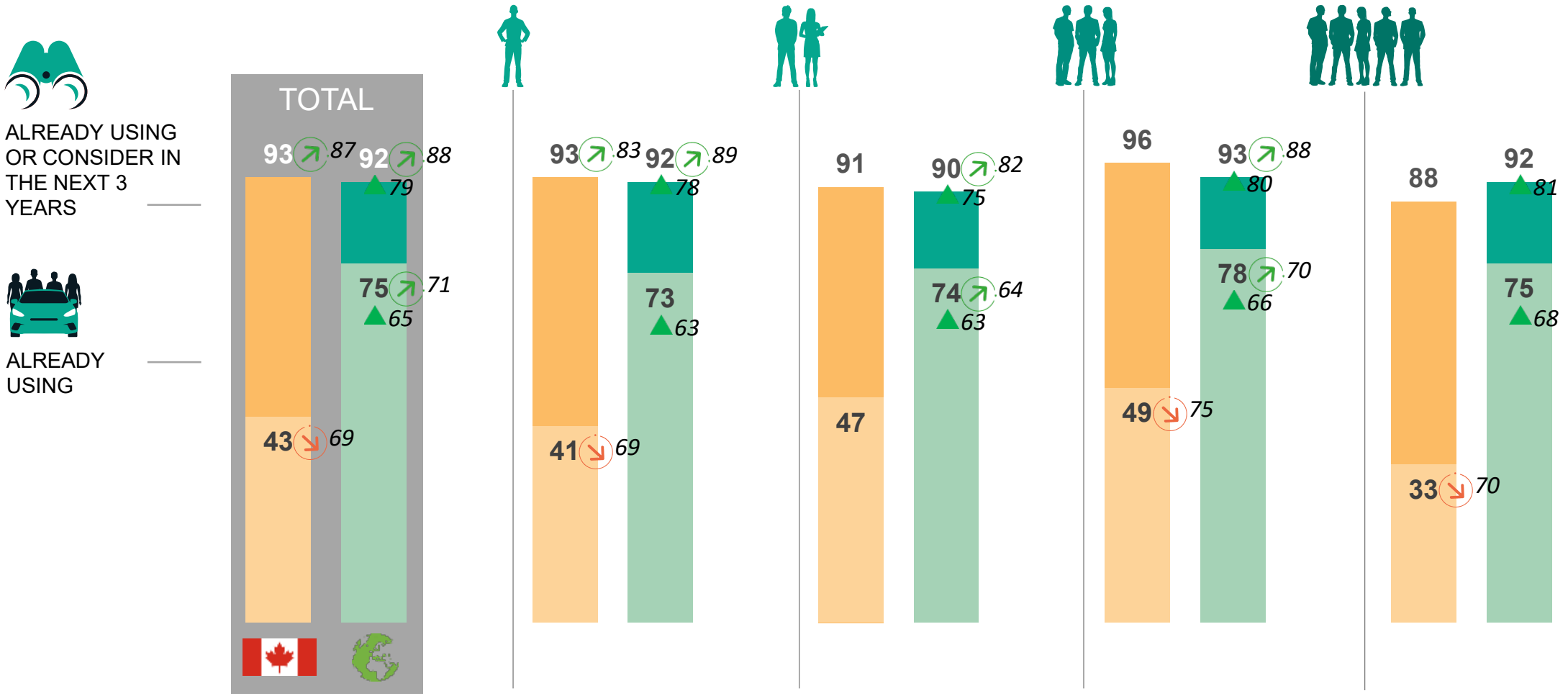
Which of the following have you implemented, or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions

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MOBILITY SOLUTIONS IMPLEMENTATION

At least one already implemented

In %



XX | Significantly higher than 2023 year

Significantly higher than 2022 year

XX = score 2023 or 2022

XX | Significantly lower than 2023 year

XX | Significantly lower than 2022 year

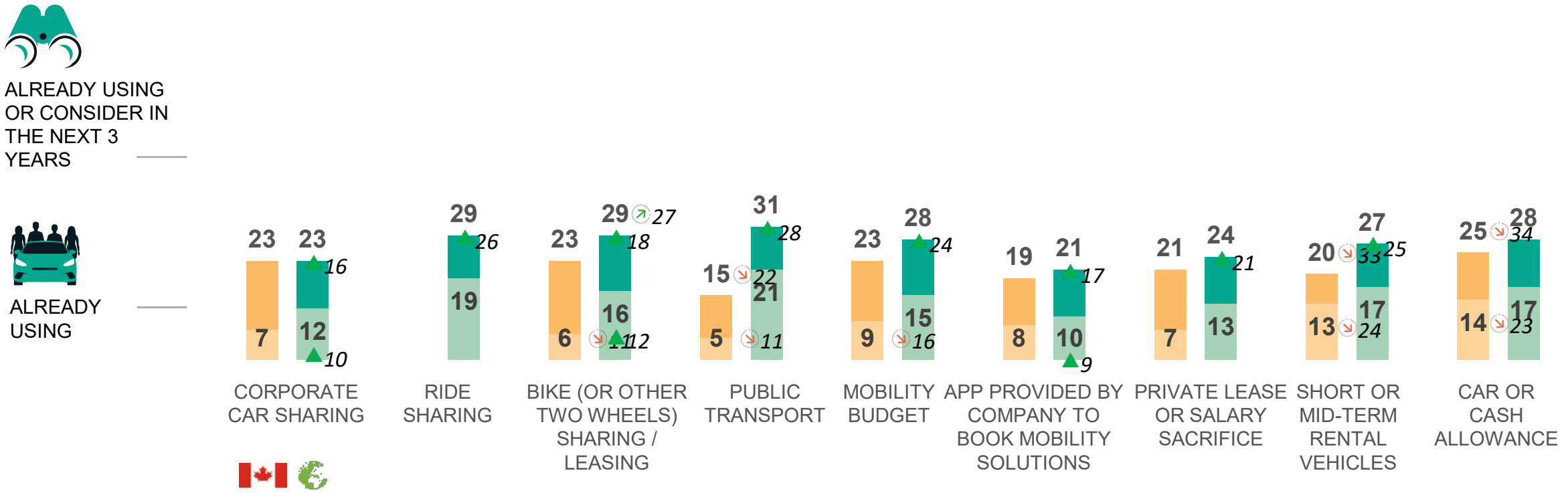
XX = score 2023 or 2022

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

43% Of companies have already implemented at least one of these solutions

In %



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

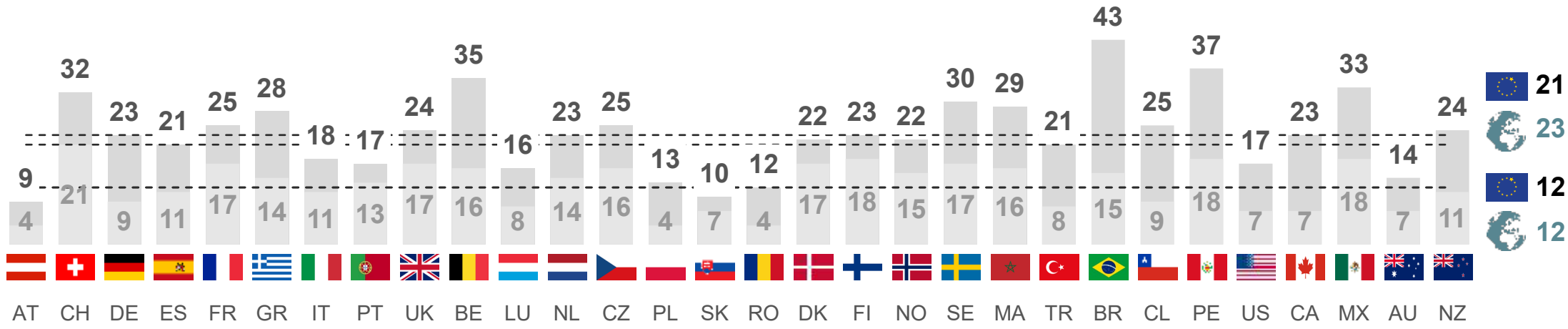
Arval Mobility Observatory
element | ARVAL BNP PARIBAS GROUP
ELEMENT-ARVAL GLOBAL ALLIANCE

CORPORATE CAR SHARING IMPLEMENTATION

In %

ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS

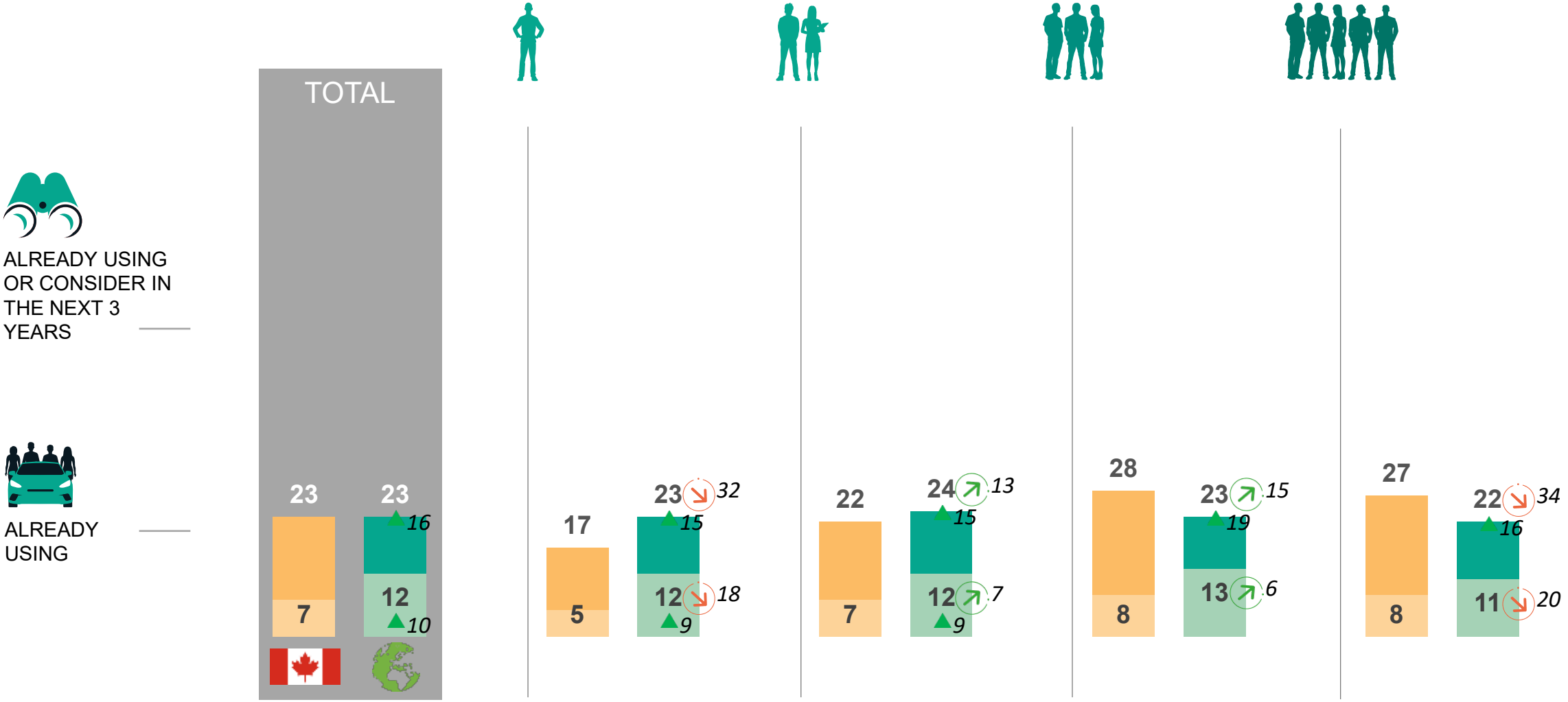
ALREADY USING



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

CORPORATE CAR SHARING IMPLEMENTATION

In %



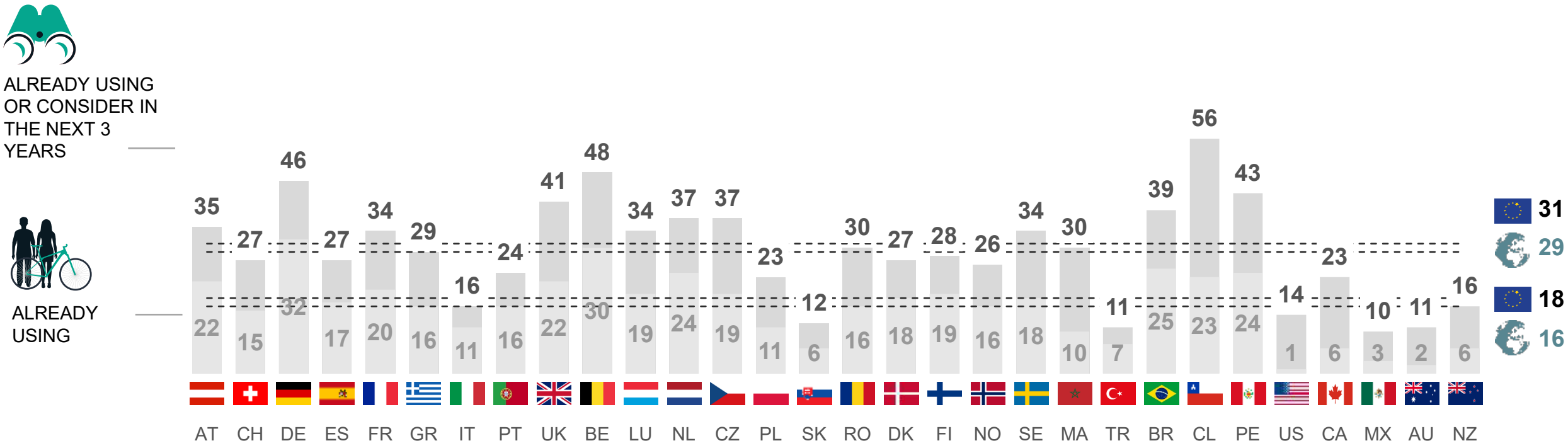
Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%

Question asked to respondents that are aware of mobility solutions

Arval Mobility Observatory
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BIKE (OR OTHER TWO WHEELS) SHARING / LEASING IMPLEMENTATION

In %

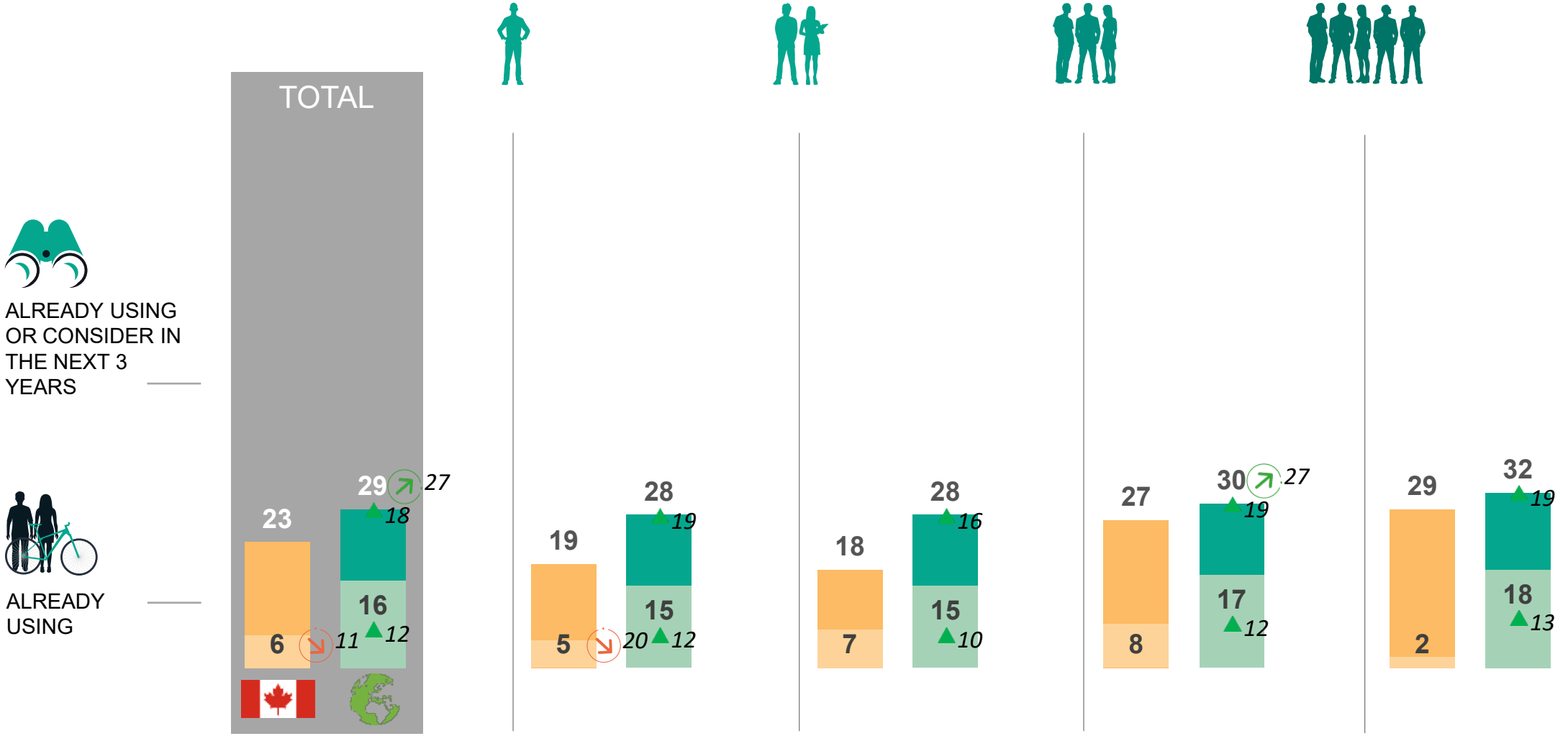


Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%

Question asked to respondents that are aware of mobility solutions

BIKE (OR OTHER TWO WHEELS) SHARING / LEASING IMPLEMENTATION

In %



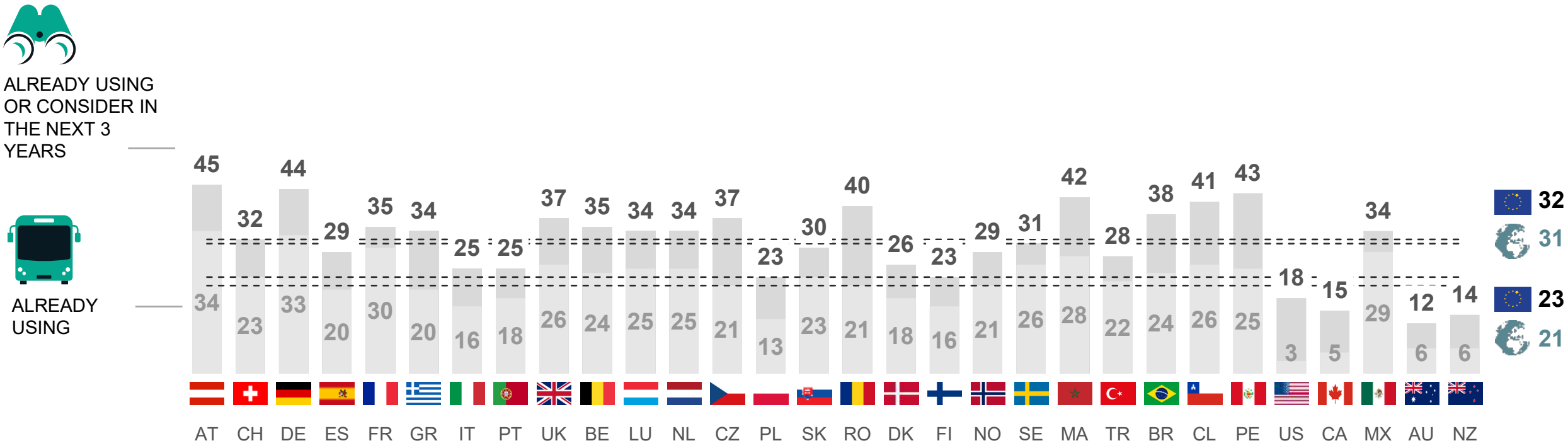
Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%

Question asked to respondents that are aware of mobility solutions

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

PUBLIC TRANSPORT IMPLEMENTATION

In %

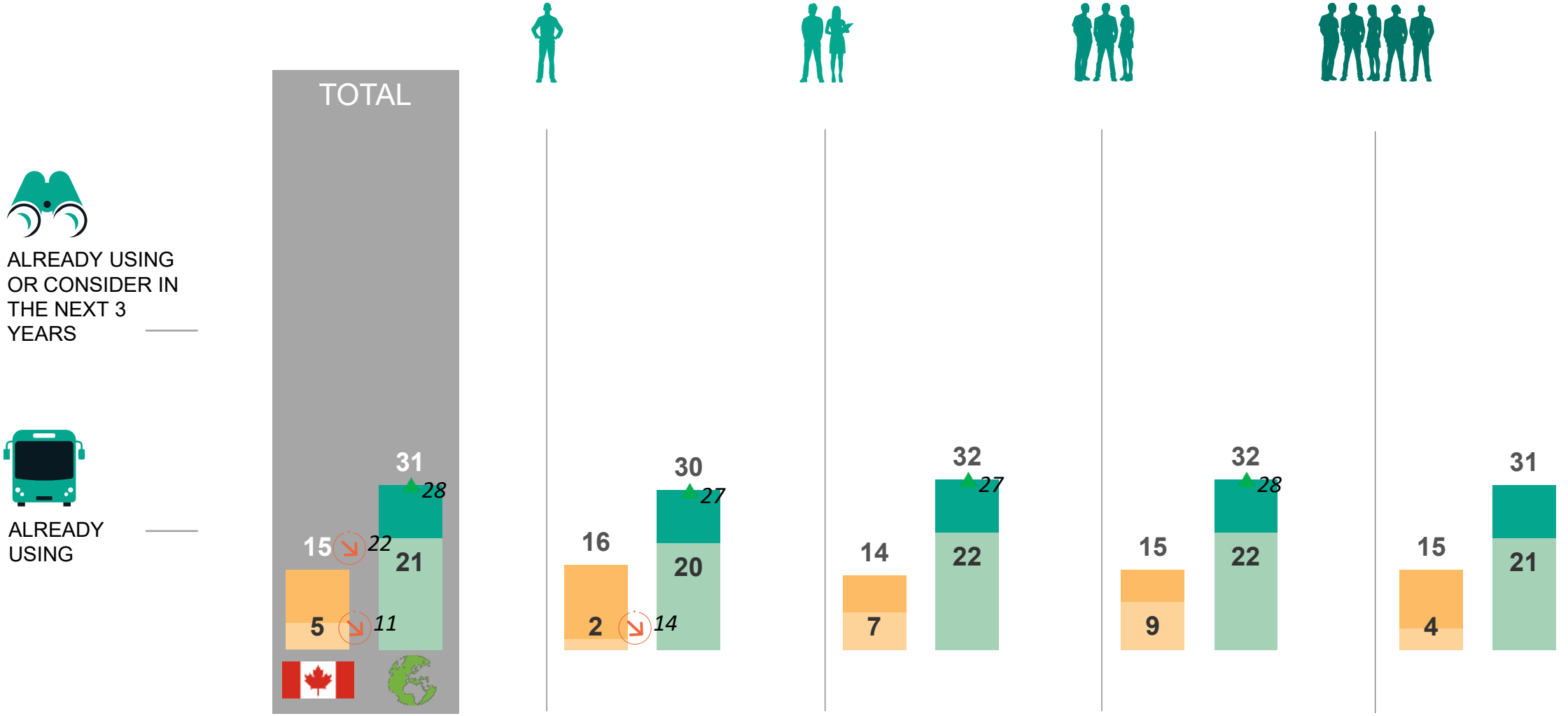


Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%

Question asked to respondents that are aware of mobility solutions

PUBLIC TRANSPORT IMPLEMENTATION

In %



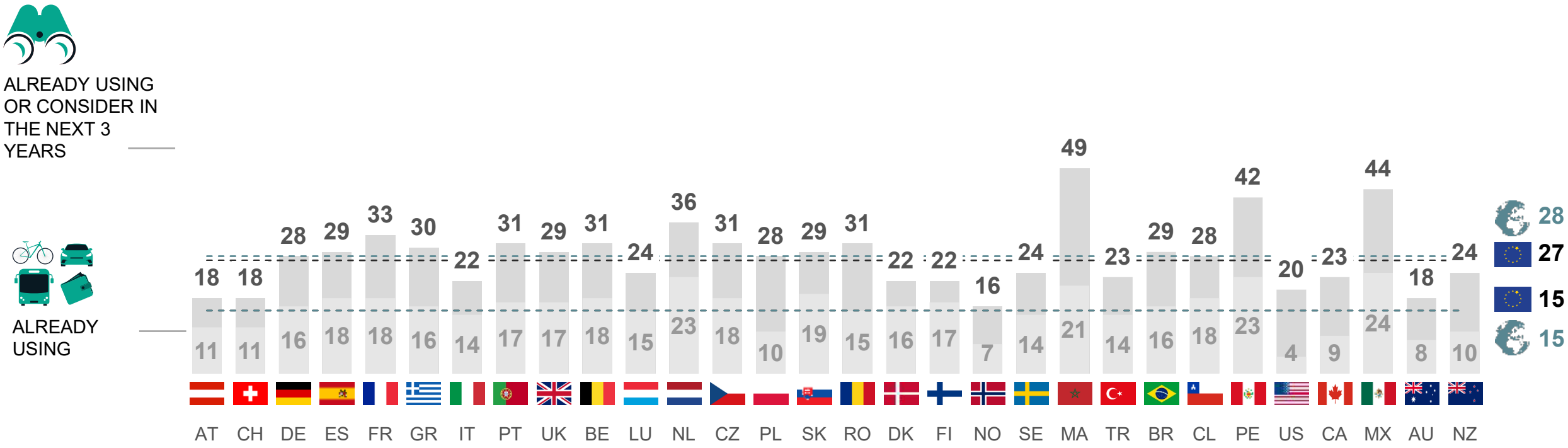
Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%

Question asked to respondents that are aware of mobility solutions

Arval Mobility Observatory
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MOBILITY BUDGET IMPLEMENTATION

In %



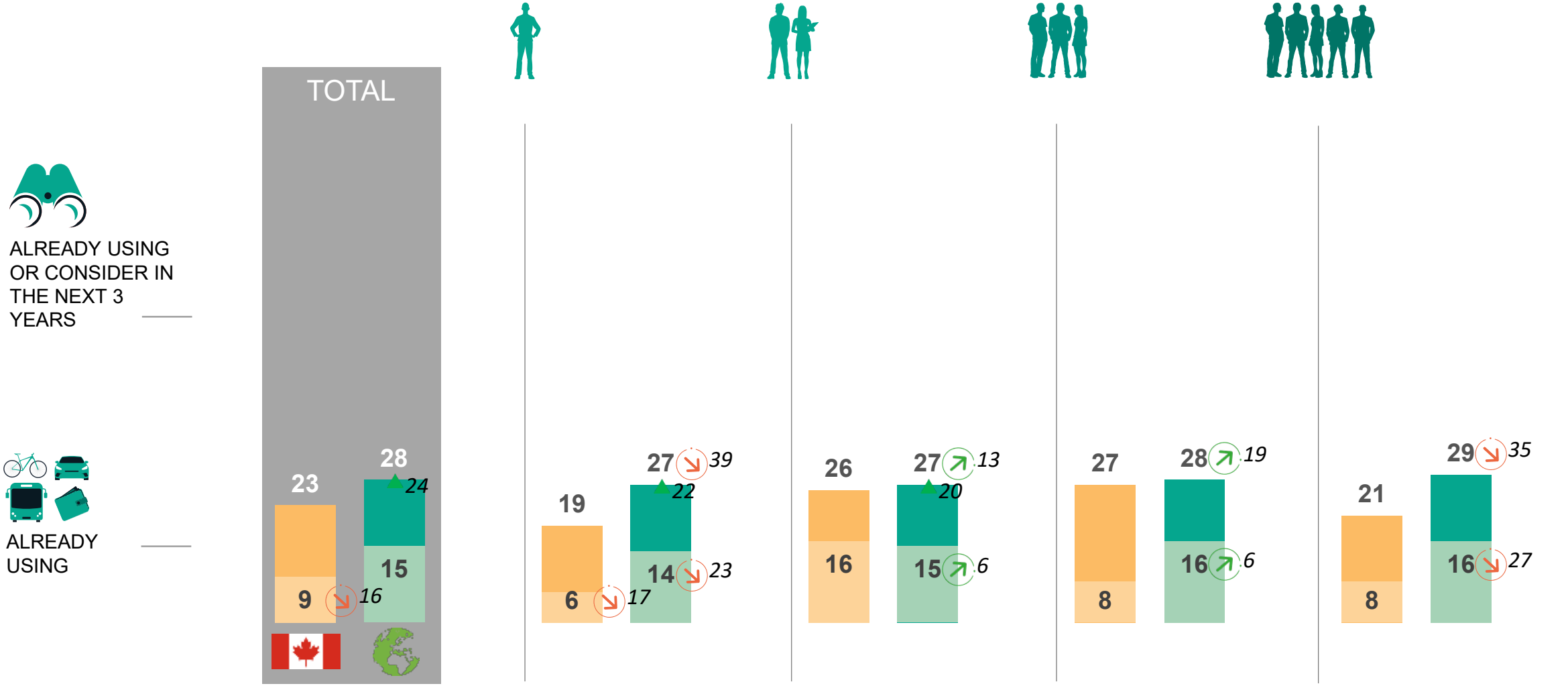
Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%

Question asked to respondents that are aware of mobility solutions

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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

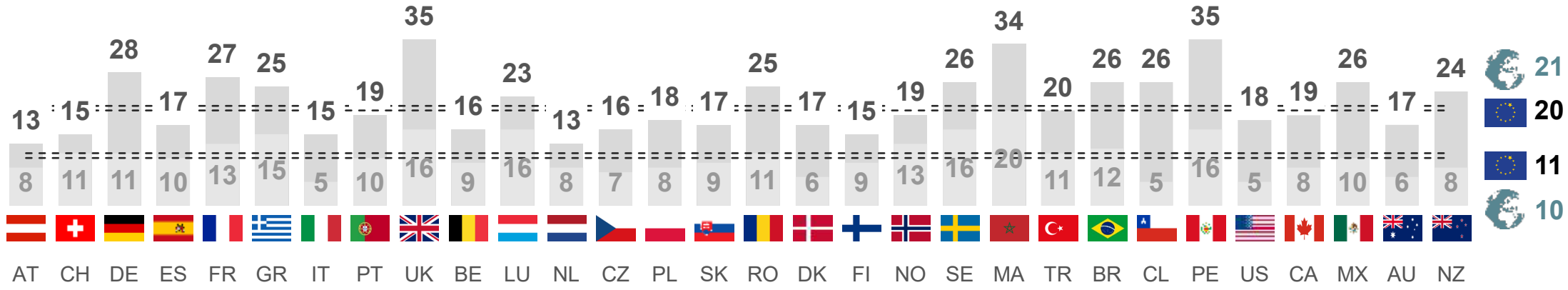
Arval Mobility Observatory
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ELEMENT-ARVAL GLOBAL ALLIANCE

AN APP PROVIDED BY THE COMPANY TO BOOK MOBILITY SOLUTIONS

In %

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

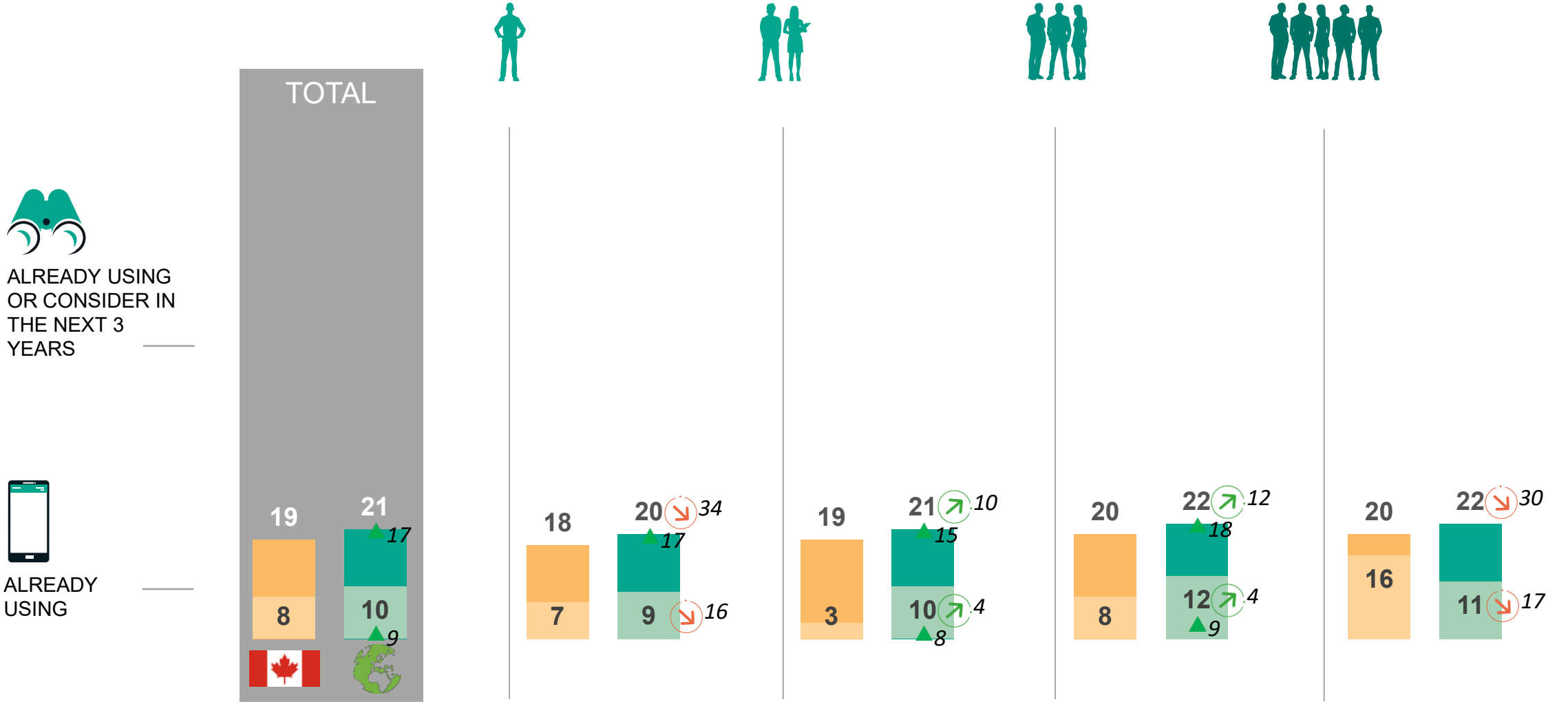
ALREADY USING



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

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

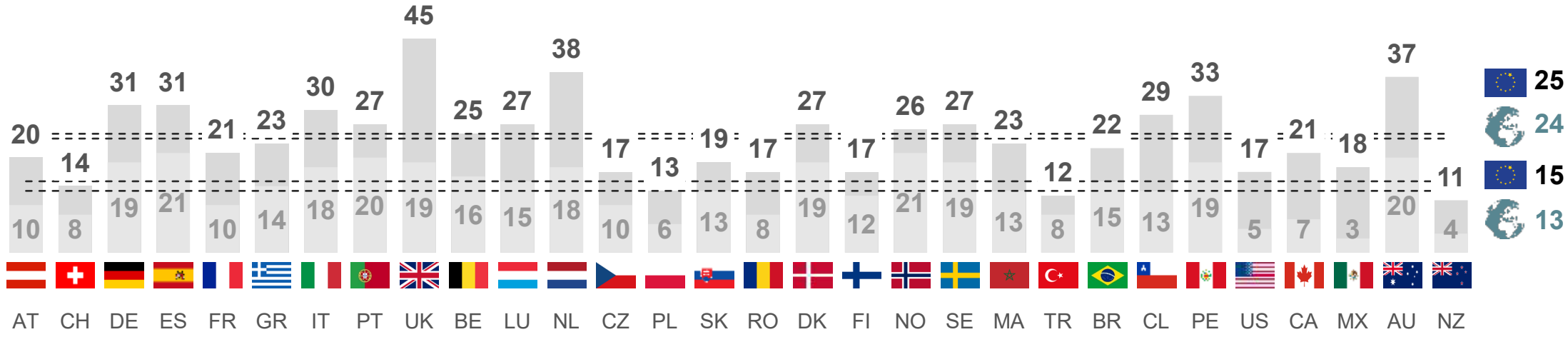
Arval Mobility Observatory
element | ARVAL BNP PARIBAS GROUP
ELEMENT-ARVAL GLOBAL ALLIANCE

PRIVATE LEASE OR SALARY SACRIFICE IMPLEMENTATION

In %

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

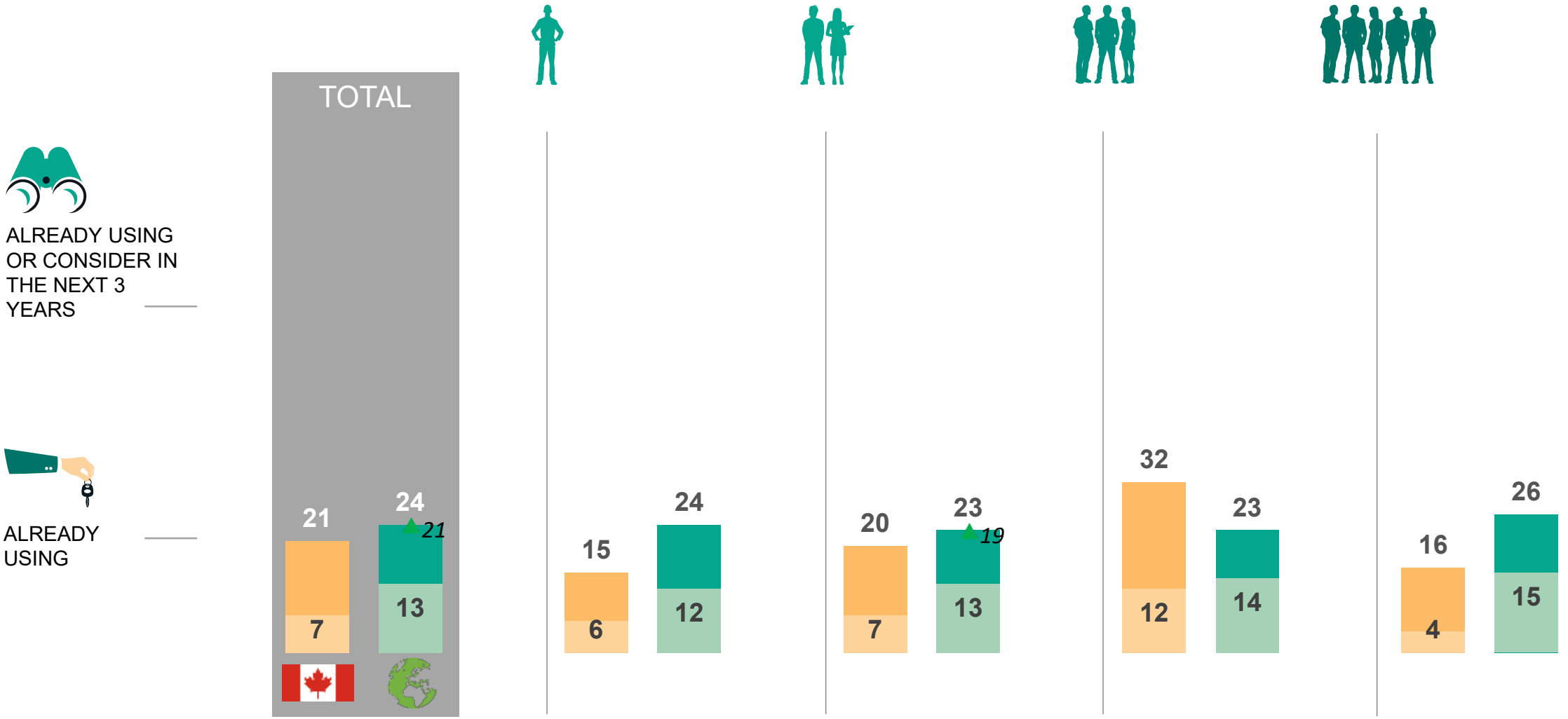
ALREADY USING



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

PRIVATE LEASE OR SALARY SACRIFICE IMPLEMENTATION

In %



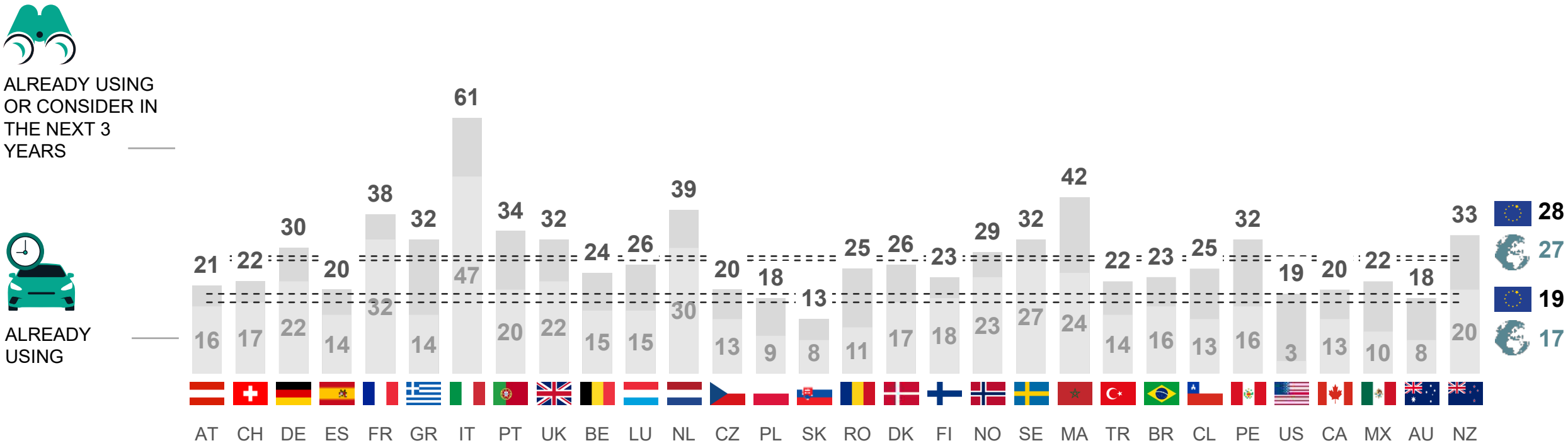
Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%

Question asked to respondents that are aware of mobility solutions

Arval Mobility Observatory
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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

Arval Mobility Observatory
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SHORT OR MID-TERM RENTAL VEHICLES IMPLEMENTATION

In %



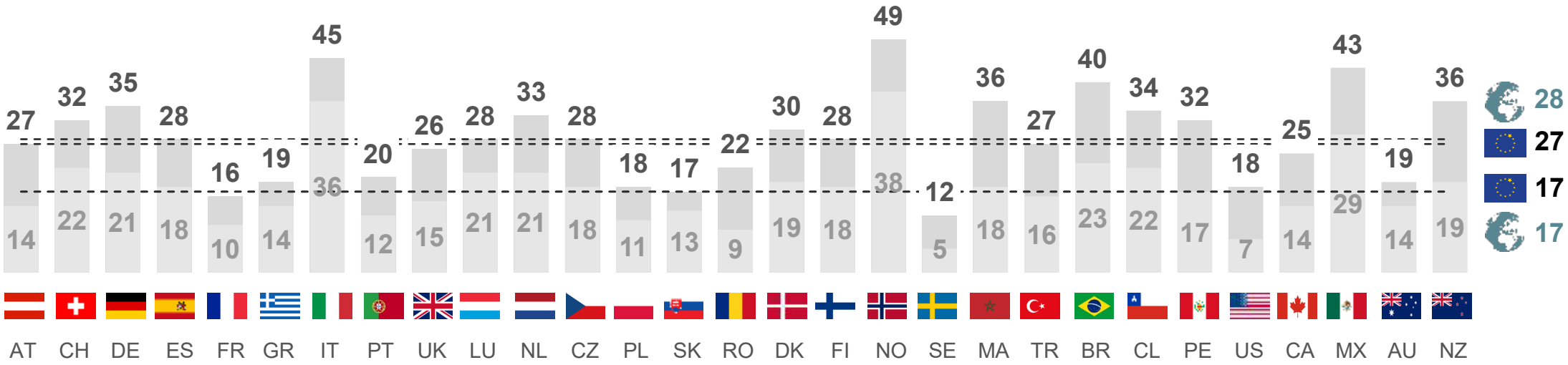
Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions

CAR OR CASH ALLOWANCE IMPLEMENTATION

In %

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING

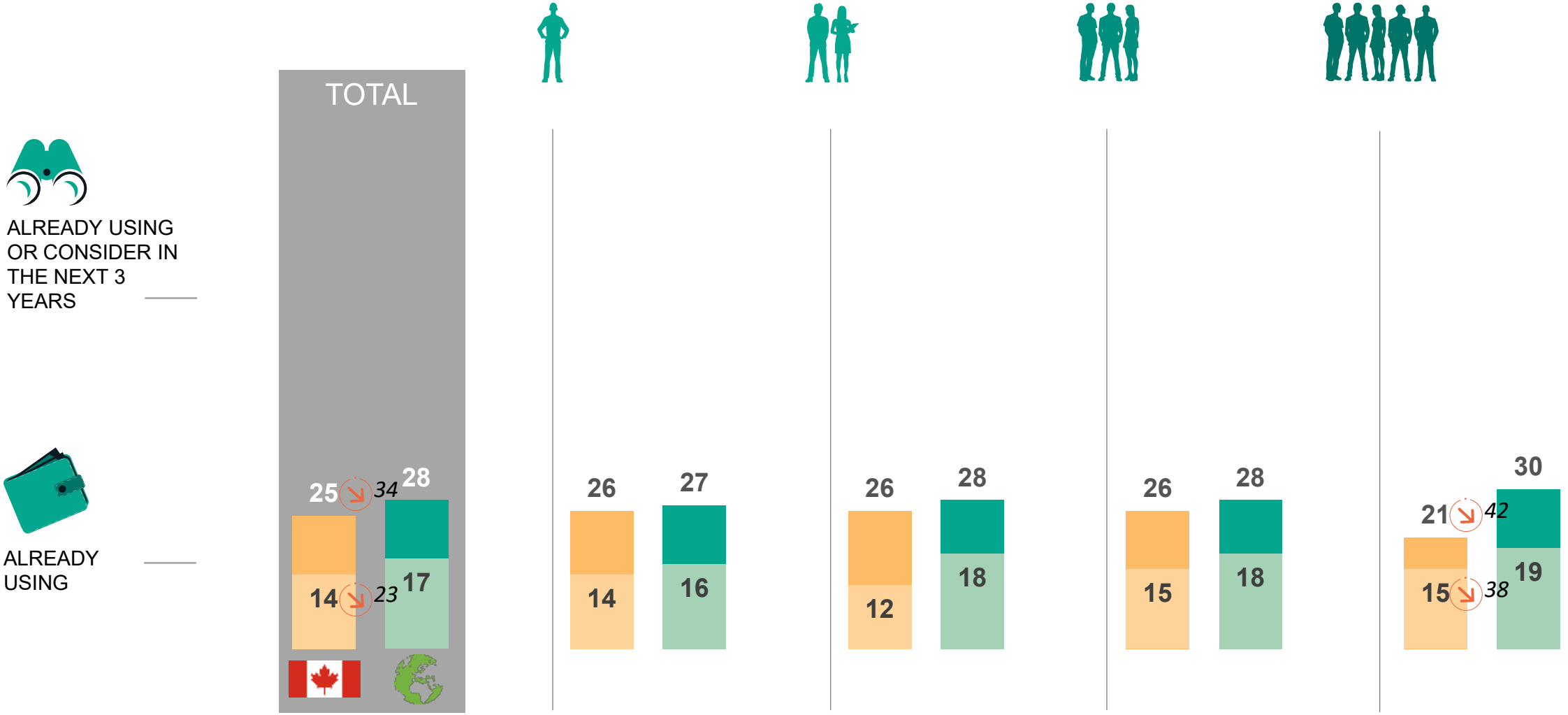


Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions

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

CAR OR CASH ALLOWANCE IMPLEMENTATION

In %



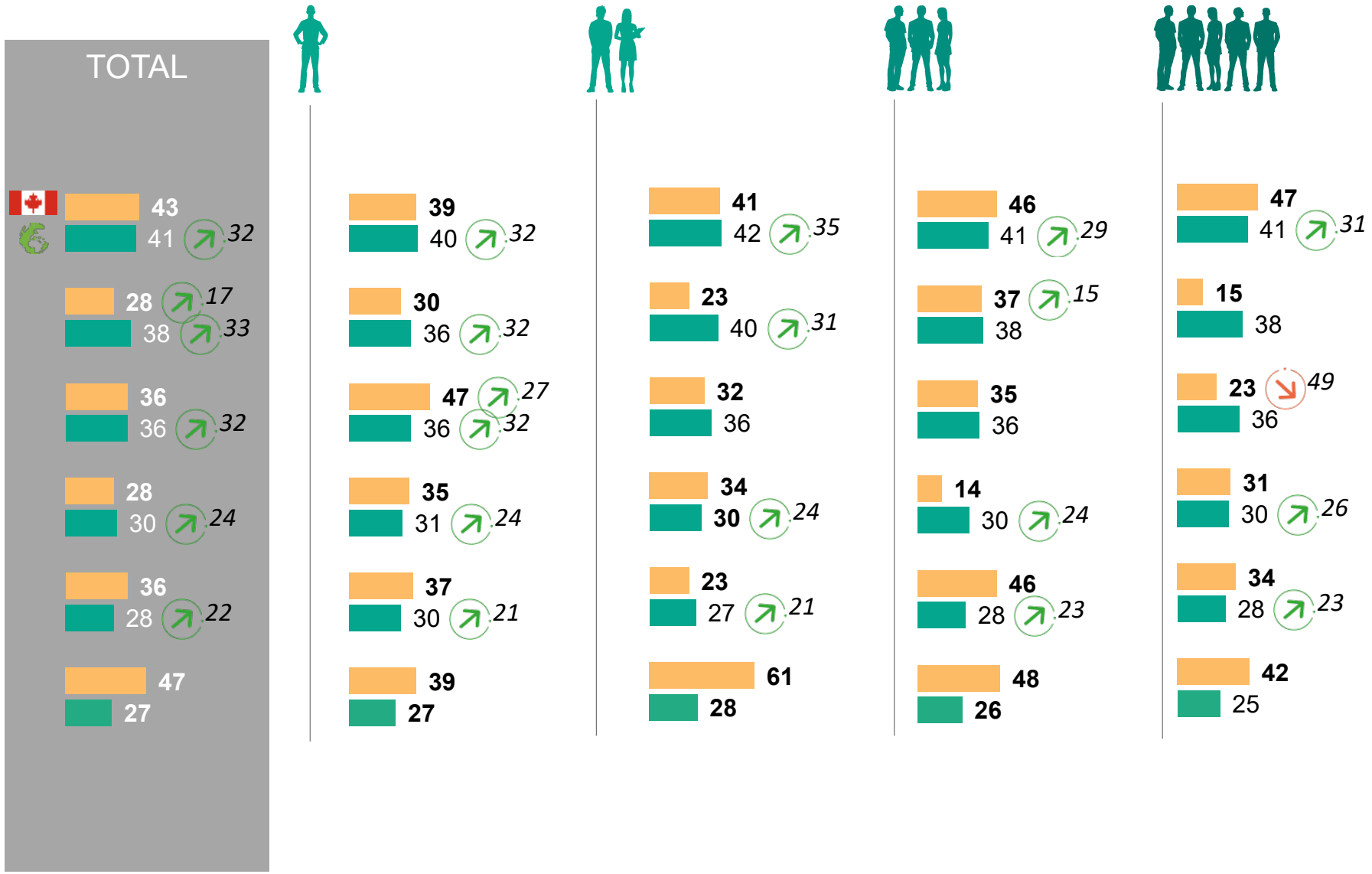
Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%

Question asked to respondents that are aware of mobility solutions

Arval Mobility Observatory
element | ARVAL BNP PARIBAS GROUP
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REASONS FOR IMPLEMENTING OR CONSIDERING MOBILITY SOLUTIONS

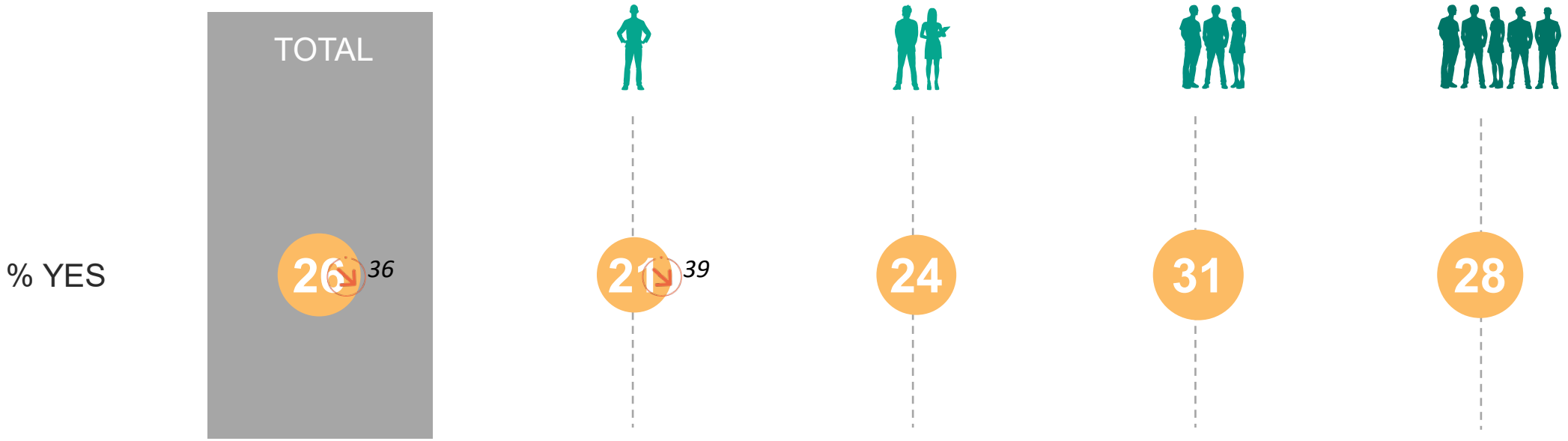
In %



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

MOBILITY AS A STRATEGIC FACTOR IN THE COMPANY

In %

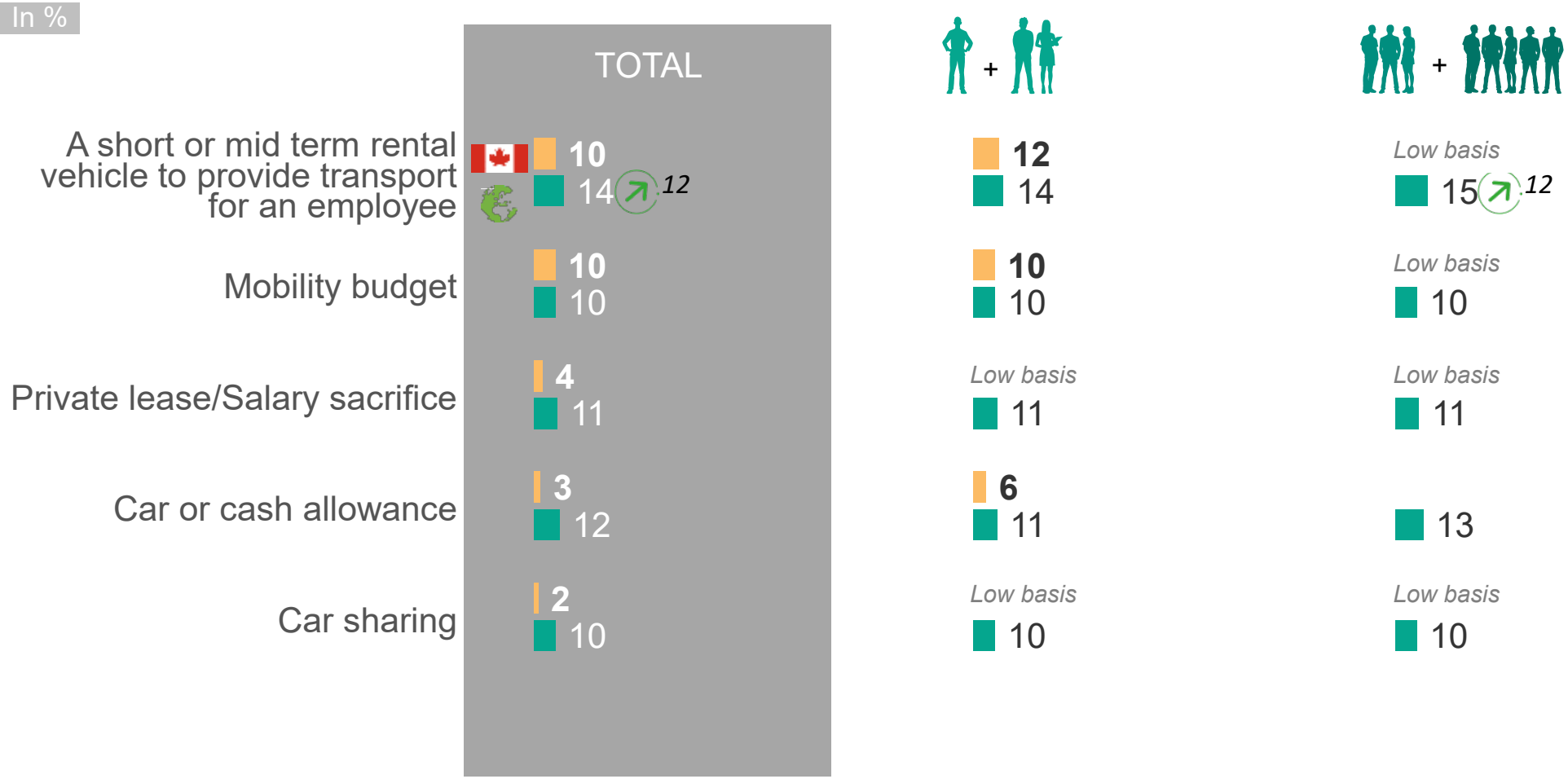


Is the mobility of all your employees a strategic factor in your company?
Basis: companies with corporate vehicles = 100%

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?

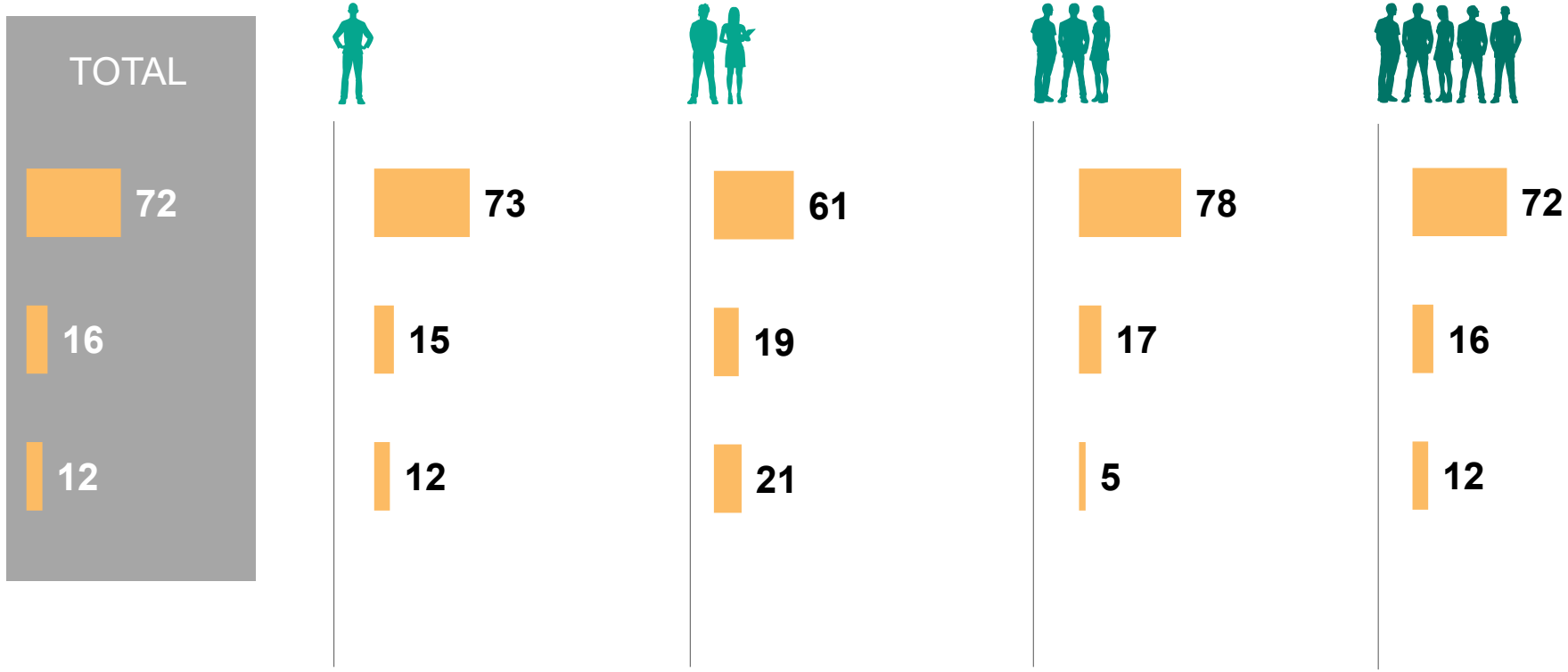
Basis: companies using or considering at least one mobility solution

Question asked to respondents that are aware of mobility solutions

MAIN REASON TO PROVIDE COMPANY CARS TO EMPLOYEES

In %

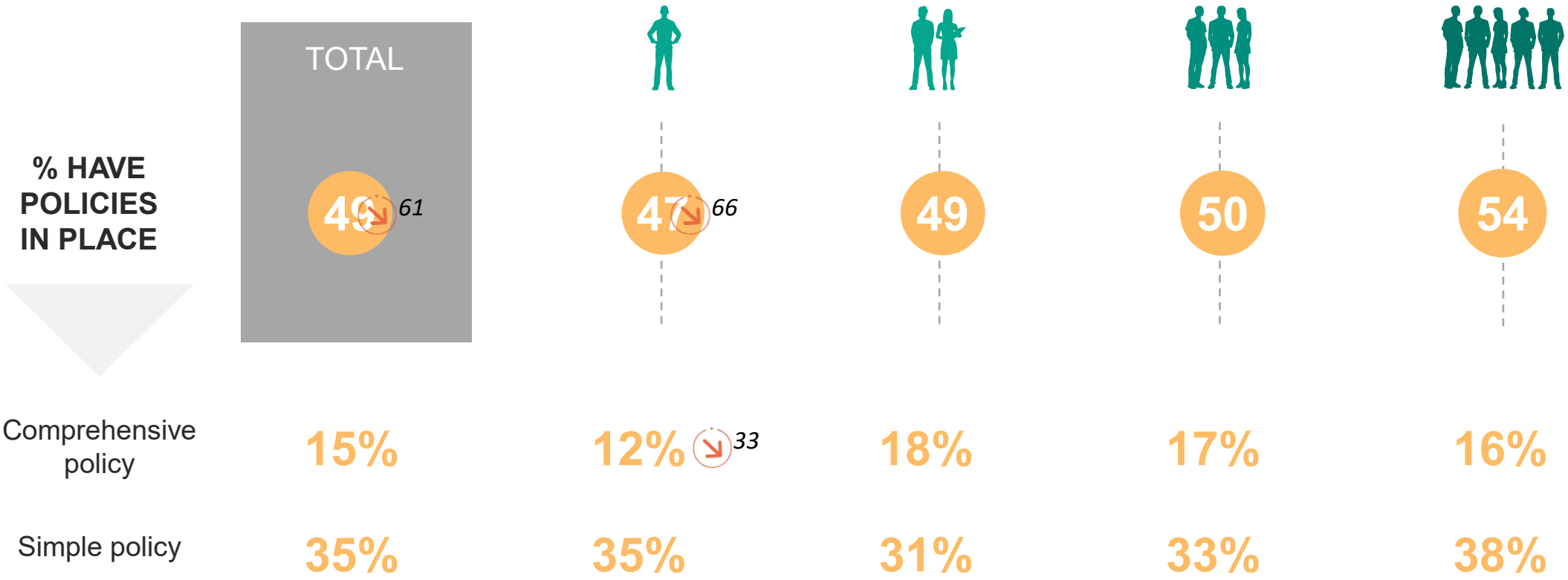
Passenger cars



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

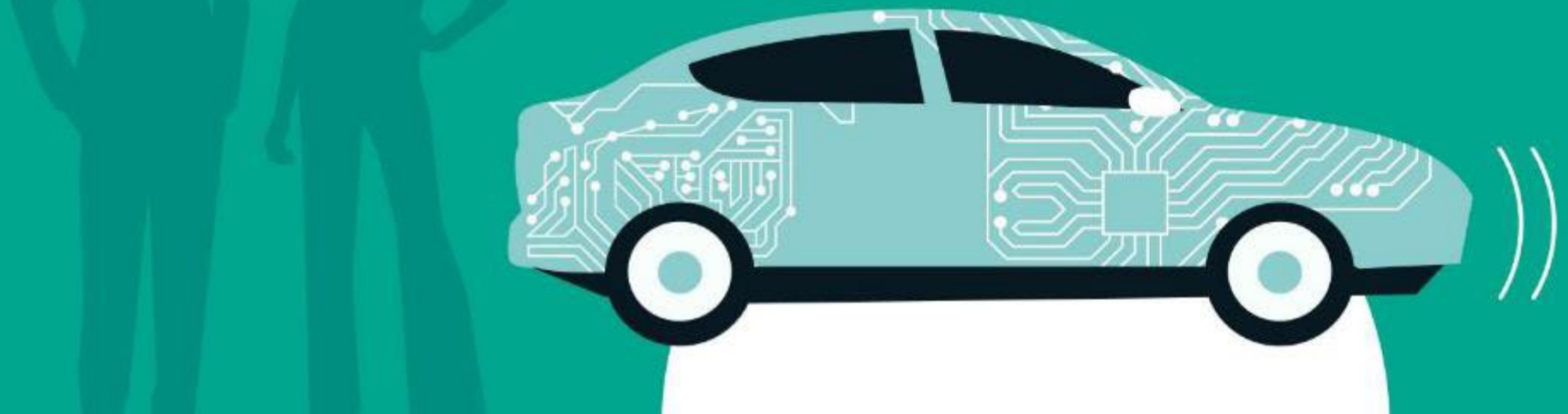
In %



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?



LIMITED USE OF CONNECTED VEHICLES AND TELEMATICS DATA

1

3 out of 10 companies have connected vehicles within their fleet – below the 40% global average and with no difference between passenger cars and light trucks.

Half 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 – below the 61% global average here too. Less than 1 out of 5 is currently using the data.

2

Automatic emergency braking system (34%) and collision avoidance or warning systems (33%) are seen as the most useful ADAS in order to improve the drivers' safety. Adaptative cruise control follows (31%).

CONNECTED VEHICLES



USE OF CONNECTED VEHICLES

30%

40%

USE OF TELEMATICS DATA

Already using 15%

16%



PROPORTION OF COMPANIES USING CONNECTED VEHICLES

All vehicles

In %

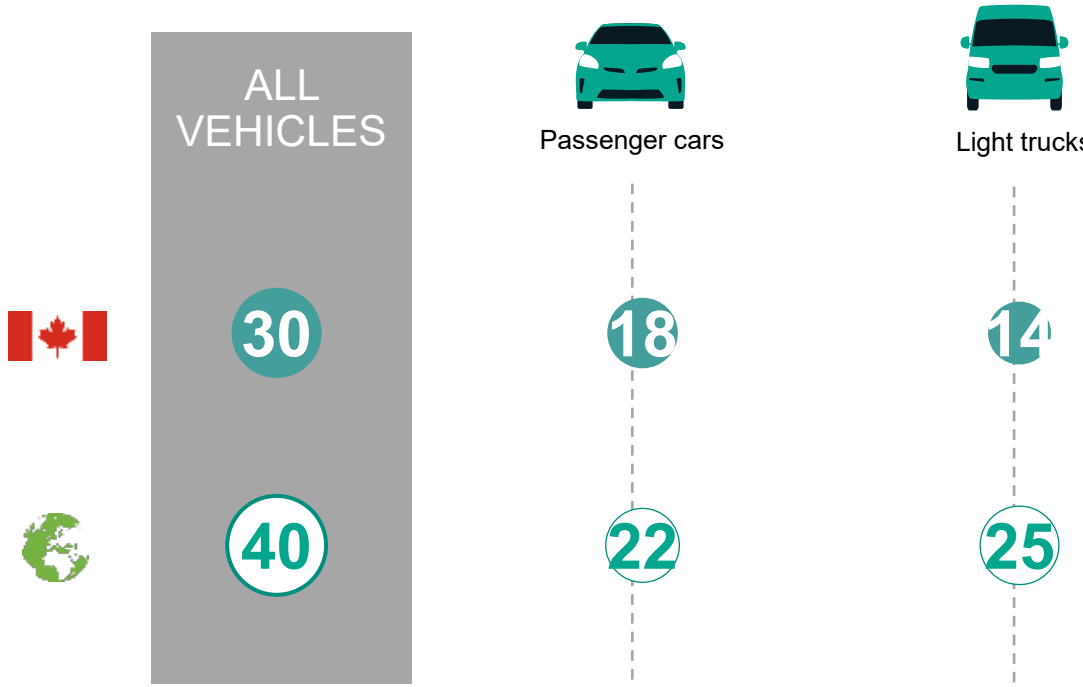
Passenger cars + Light trucks

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

HOW TO READ THE RESULTS ?

30% of companies with fleet using connected vehicles for all or part of their fleet.

18% use connected vehicles for passenger cars, while 14% use connected vehicles for Light trucks.



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 Light trucks

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

All vehicles

In %

Passenger cars + Light trucks

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?
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 Light trucks

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

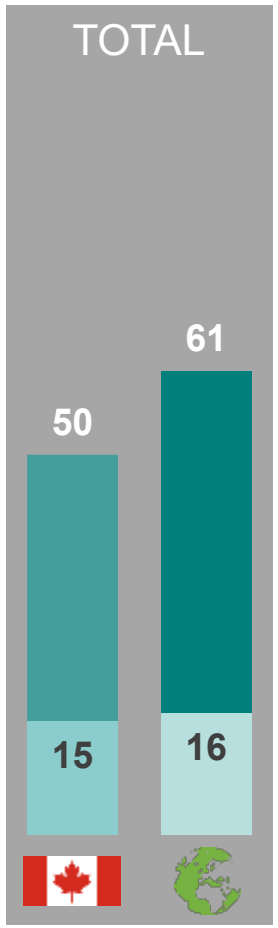
All vehicles

In %

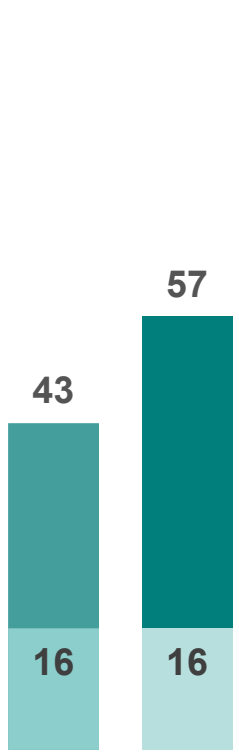
Passenger cars + Light trucks

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



Passenger cars



Light trucks



HOW TO READ THE RESULTS ?

50% of the companies are already using or consider using the data coming from the vehicle box thanks to a telematics platform in the next 3 years.
15% of companies are currently using the data.

New question added in 2024

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

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

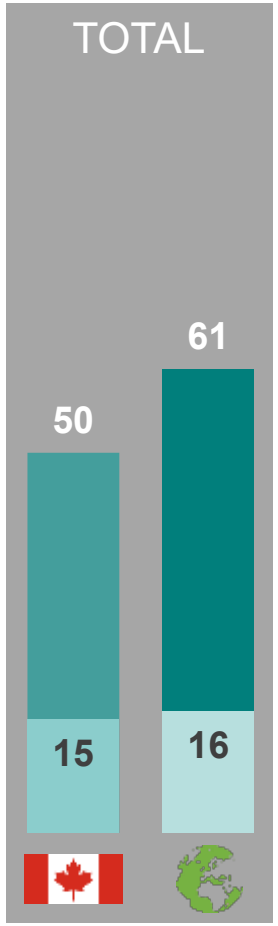
All vehicles

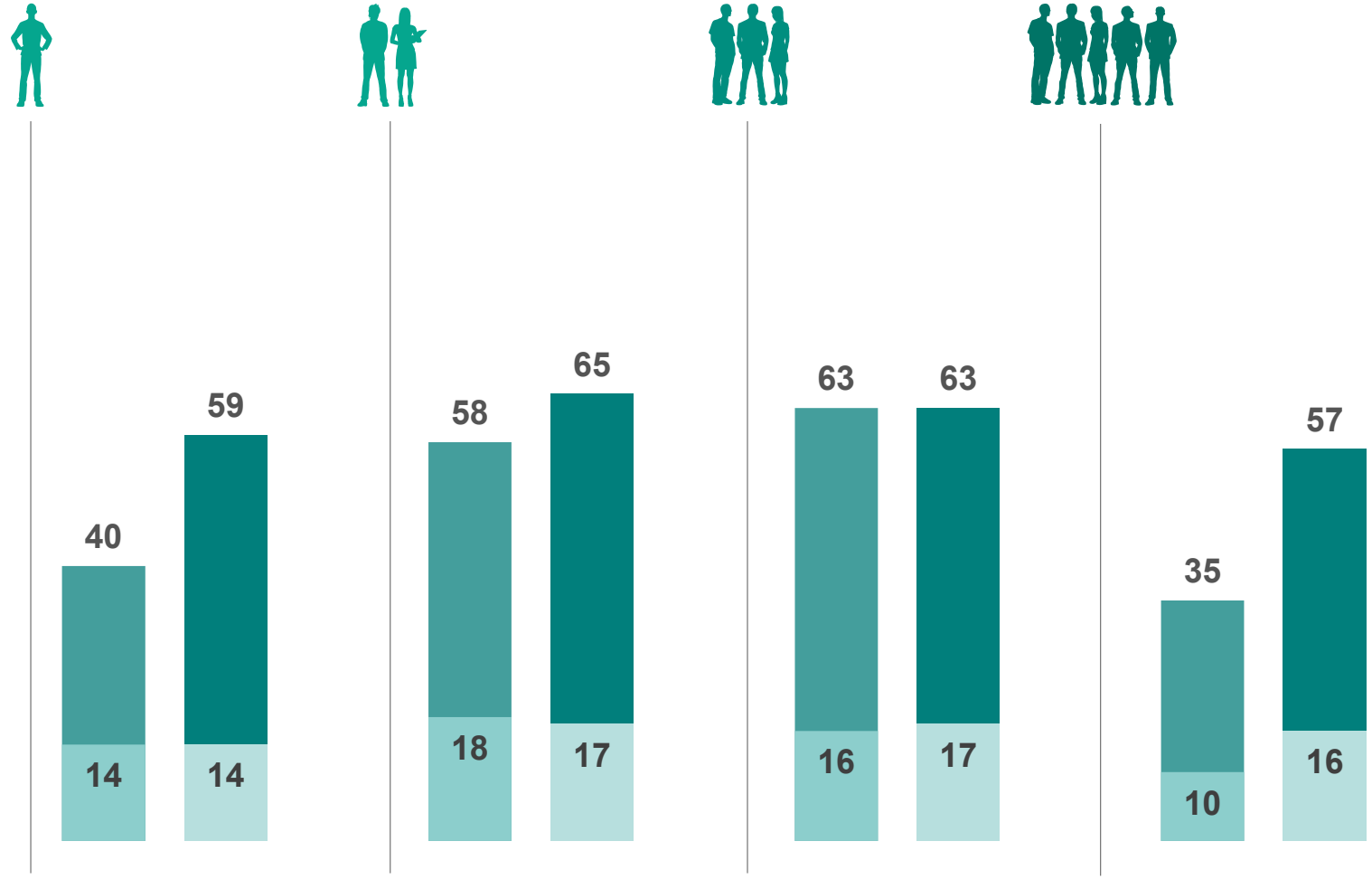
In %

Passenger cars + Light trucks

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING





New question added in 2024

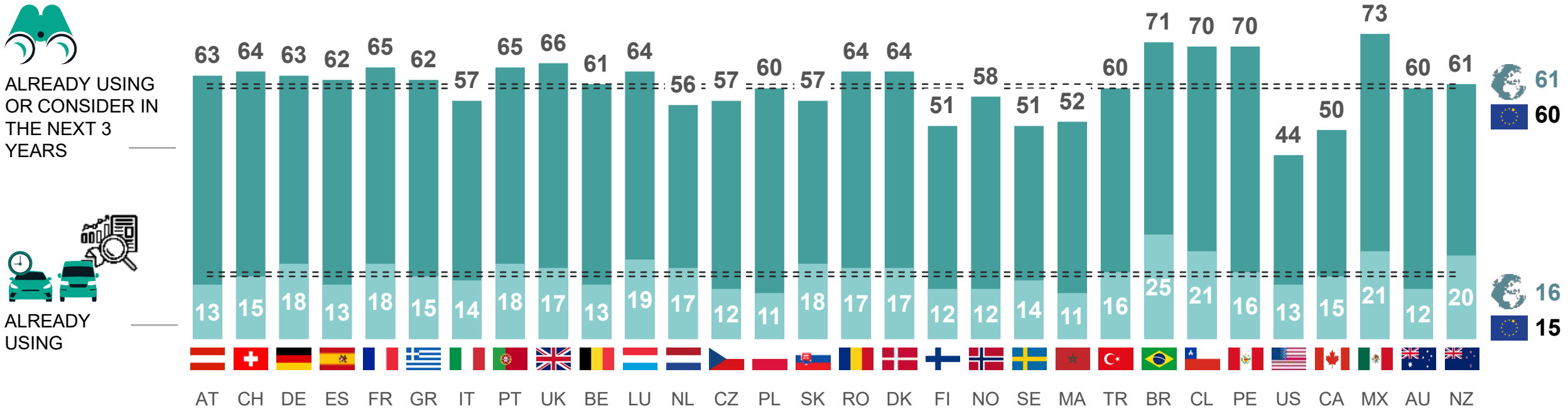
Do you use or consider using the data coming from the vehicle box thanks to a telematics platform ?
Basis: companies with a fleet using connected vehicles for all or part of their fleet.

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

All vehicles

In %

Passenger cars + Light trucks



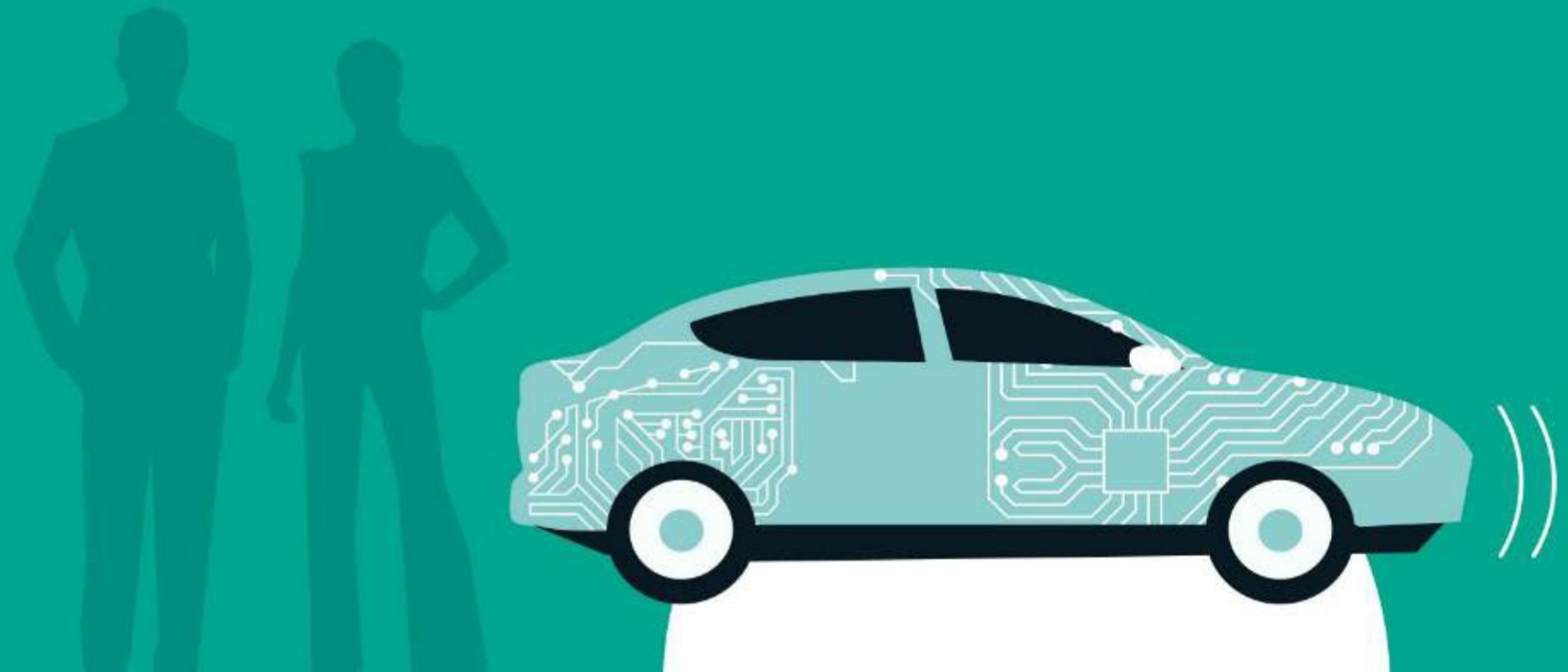
New question added in 2024

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



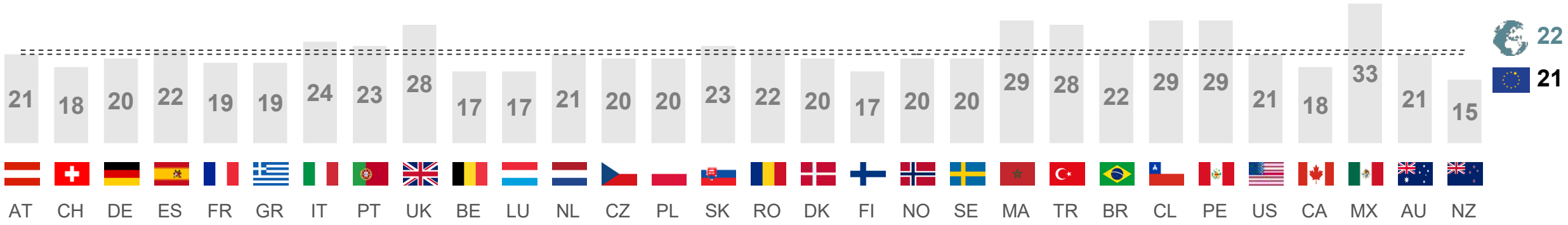
PROPORTION OF COMPANIES USING CONNECTED VEHICLES

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

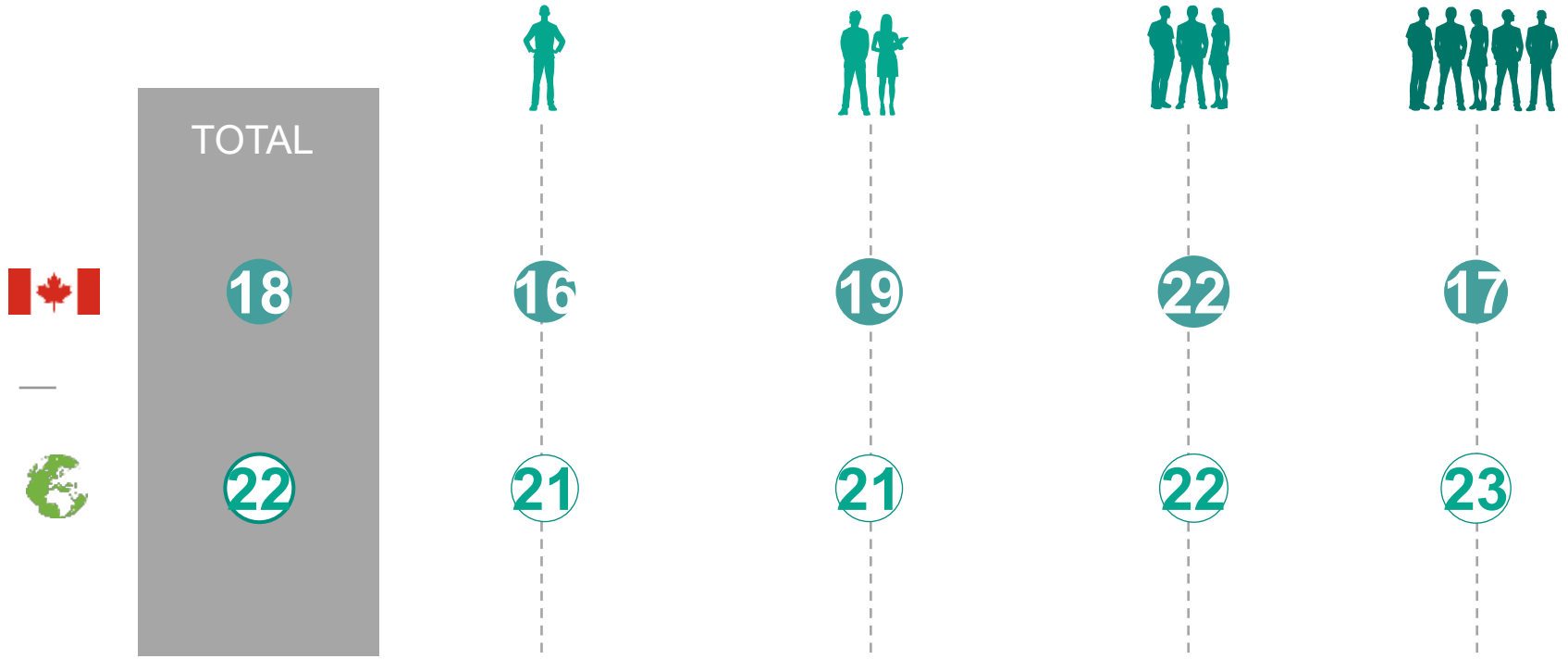
In %

Passenger cars

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

HOW TO READ THE RESULTS ?

18% use connected vehicles for passenger cars.



Change of definition in 2024. No comparison with 2023

Is your fleet connected thanks to a telematic tool?

Basis: companies with at least one passenger car in fleet

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

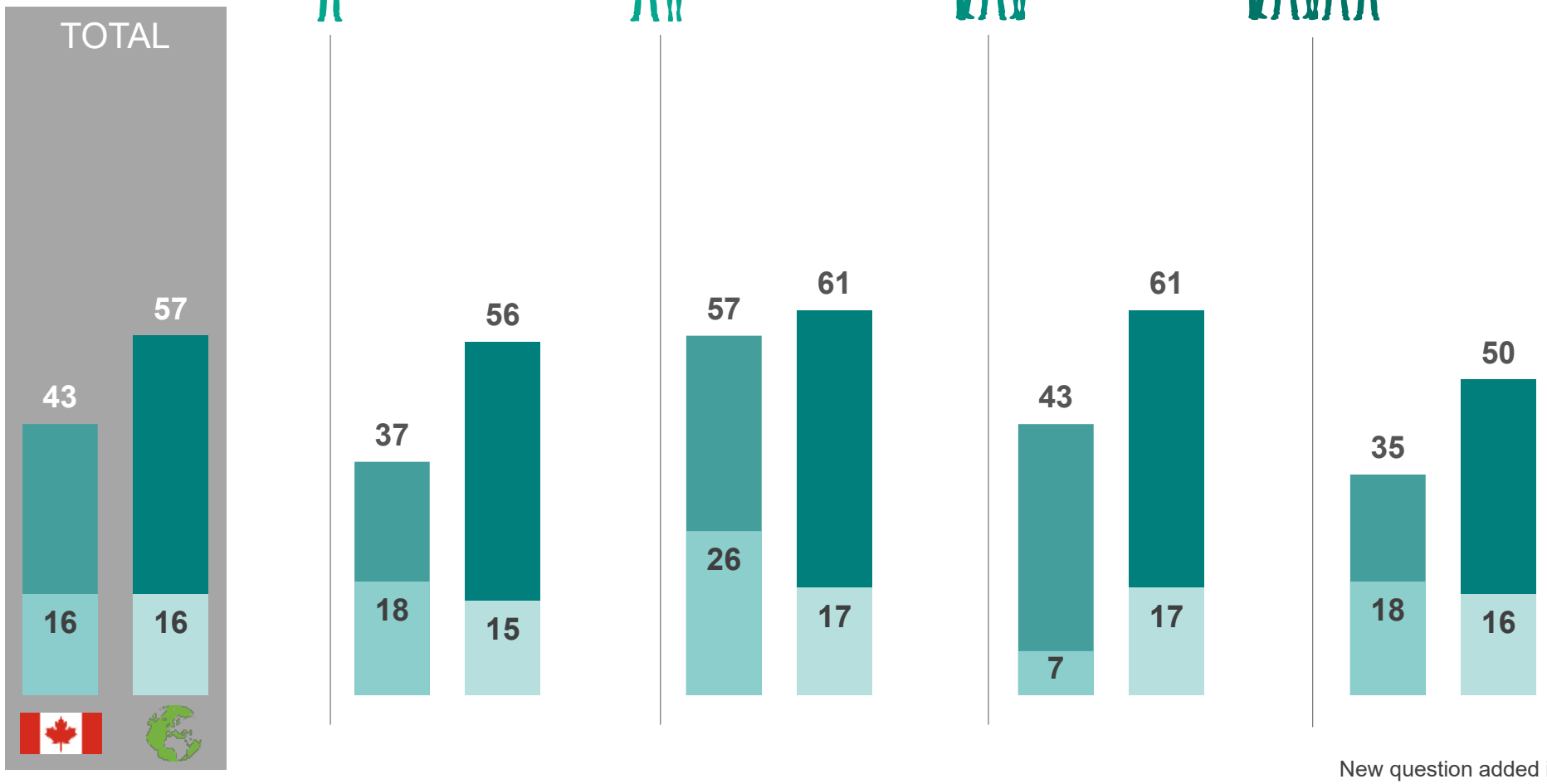
Passenger cars

In %

Passenger cars

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



New question added in 2024

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

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

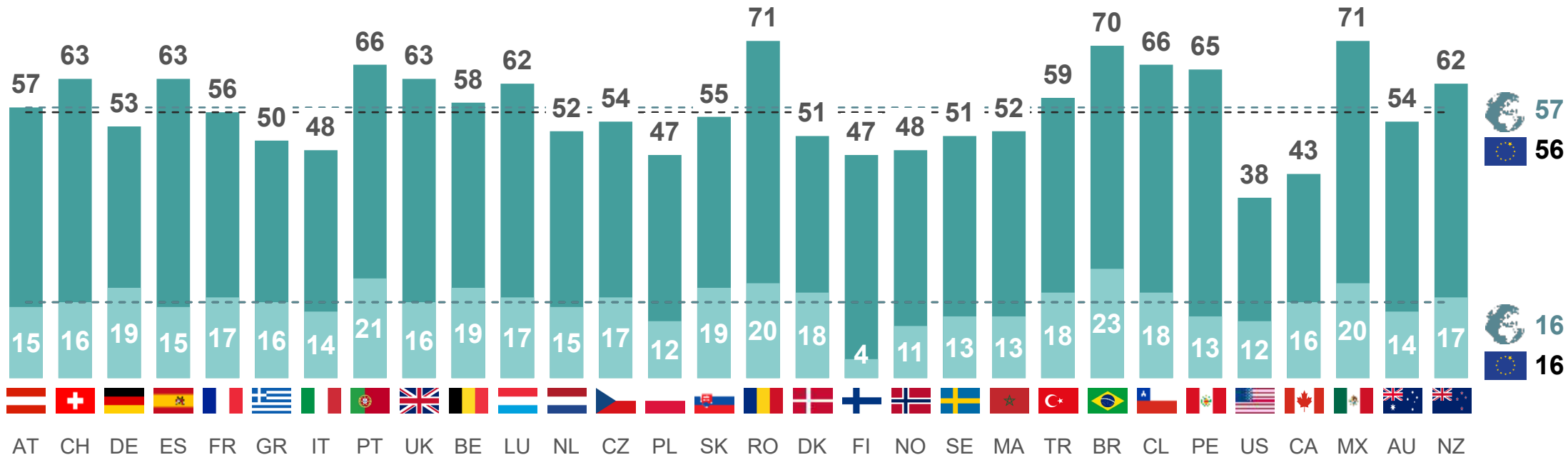
Passenger cars

In %

Passenger cars

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



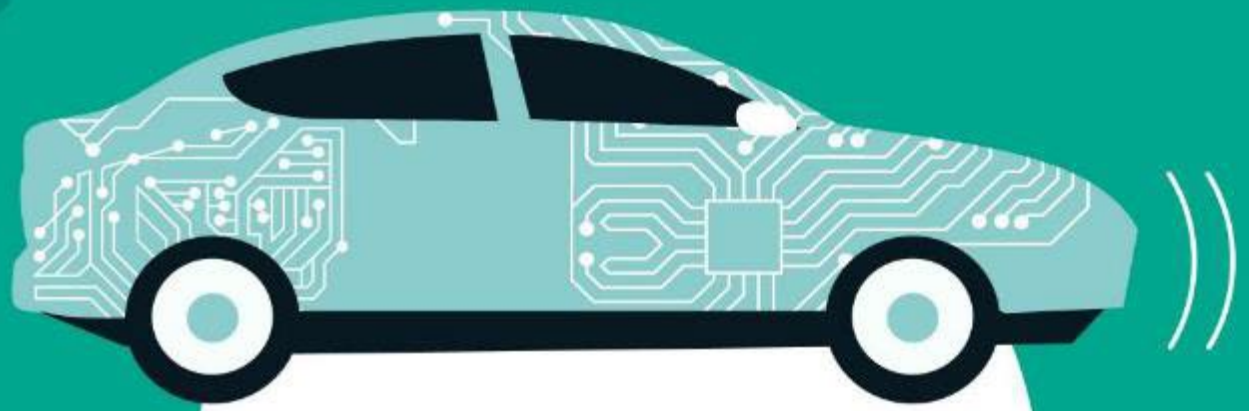
New question added in 2024

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. Light trucks



PROPORTION OF COMPANIES USING CONNECTED VEHICLES

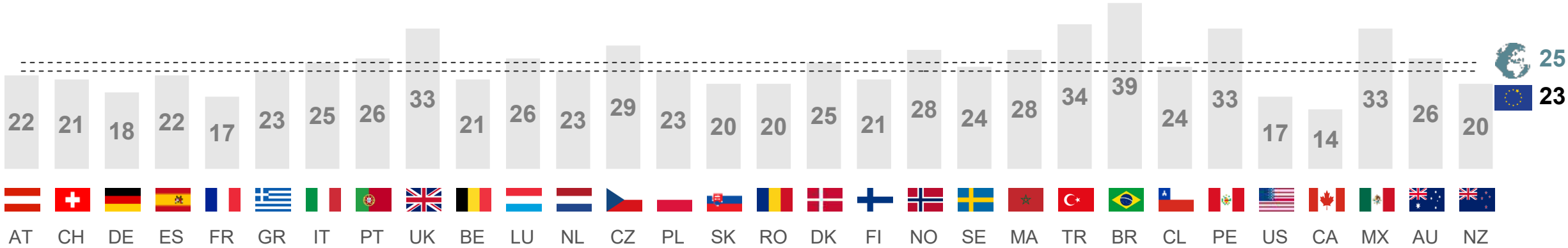
Light trucks

In %



Light trucks

PROPORTION OF COMPANIES USING CONNECTED VEHICLES FOR THEIR Light trucks



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 Light trucks

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

Light trucks

In %



Light trucks

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

HOW TO READ THE RESULTS ?

14% use connected vehicles for Light trucks.



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 Light truck car in fleet

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

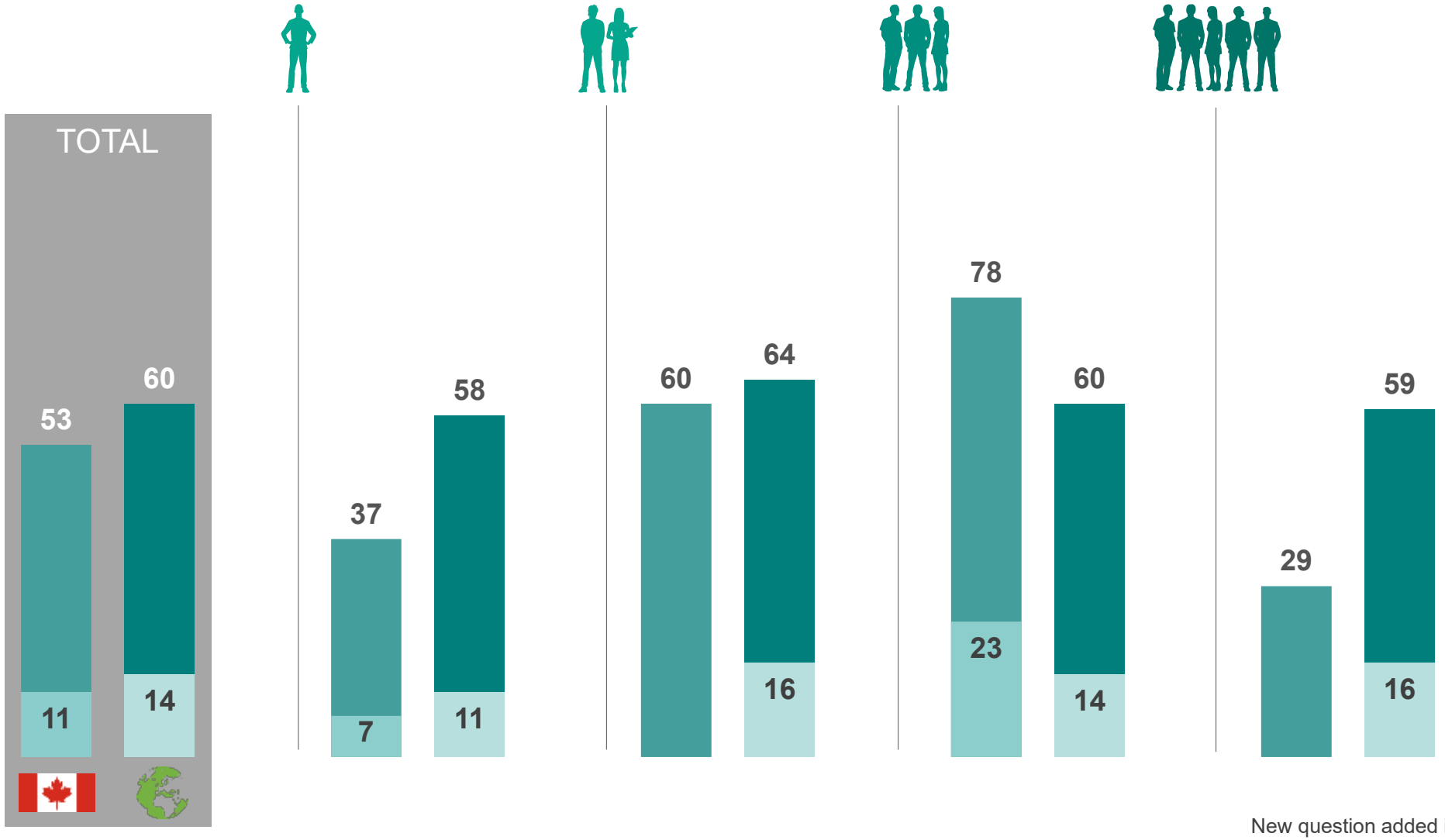
Light trucks

In %

Light trucks

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 LVCs fleet using connected vehicles for all or part of their Light truck.

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

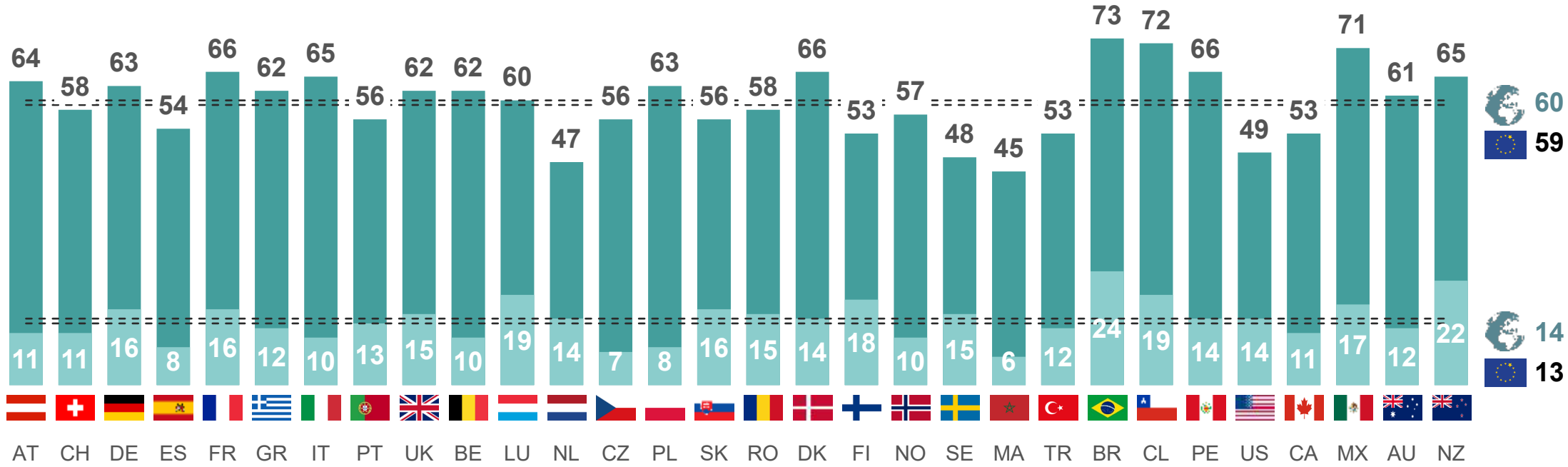
Light trucks

In %

Light trucks

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



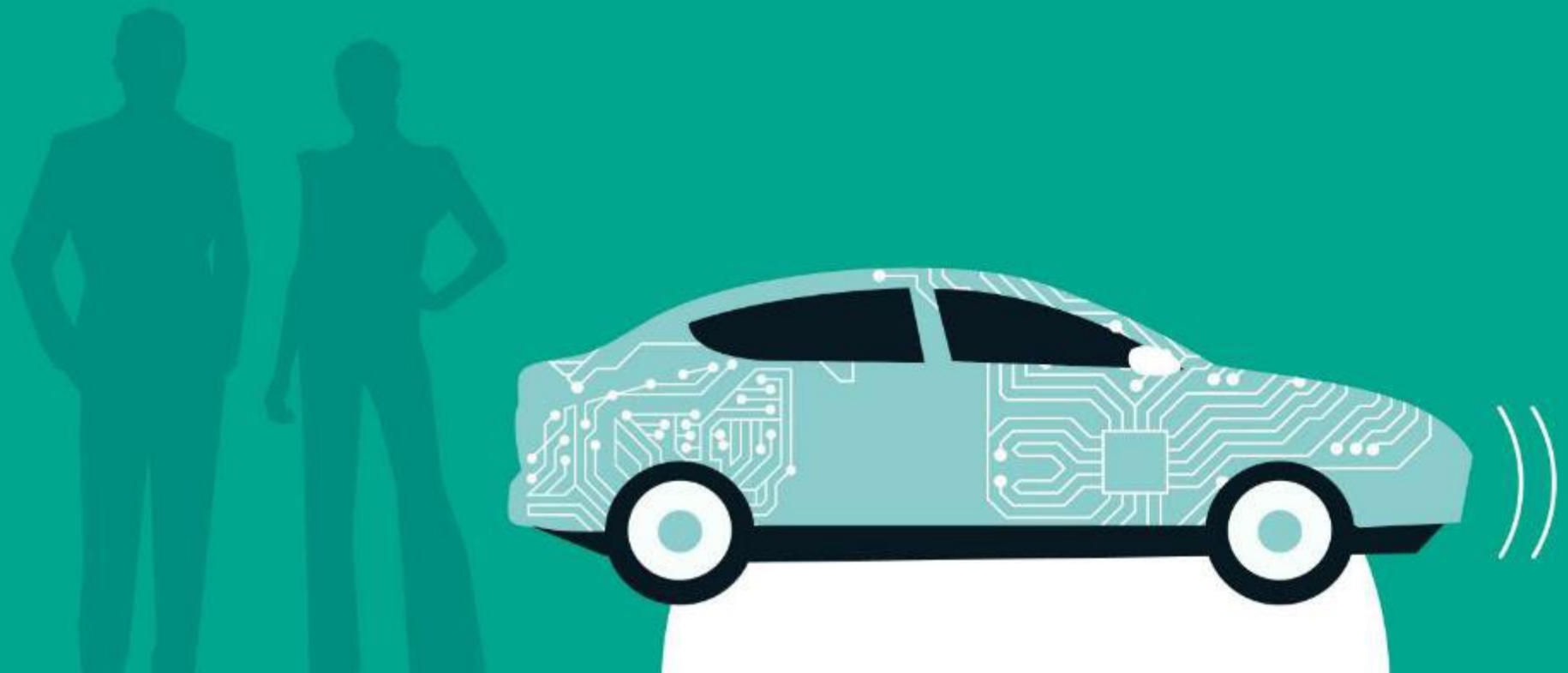
New question added in 2024

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 Light truck.

7

CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY

D. ADVANCED DRIVING ASSISTANCE SYSTEMS



MOST USEFUL “ADVANCED DRIVING ASSISTANCE SYSTEMS” TO IMPROVE DRIVER SAFETY

In %



Passenger cars + Light trucks

	TOTAL				
Automatic emergency braking system	34	41	26	36	27
Collision Avoidance or warning systems	33	29	30	41	33
Adaptive Cruise Control	31	29	34	29	36
Lane departure warning system	28	36	33	26	14 ↘ 33
Automatic Parking Systems	24	23	20	23	33
Pedestrian detection system	21	18	32	19	16
Driver Fatigue warning	18	15	13	21	25
Don’t know	1 ↘ 3	0	0	0	3

Which of the following 'Advanced Driving Assistance Systems' do you feel are the most useful to be fitted to a company car to improve driver safety?
Basis: companies with corporate vehicles = 100%



Thank you

