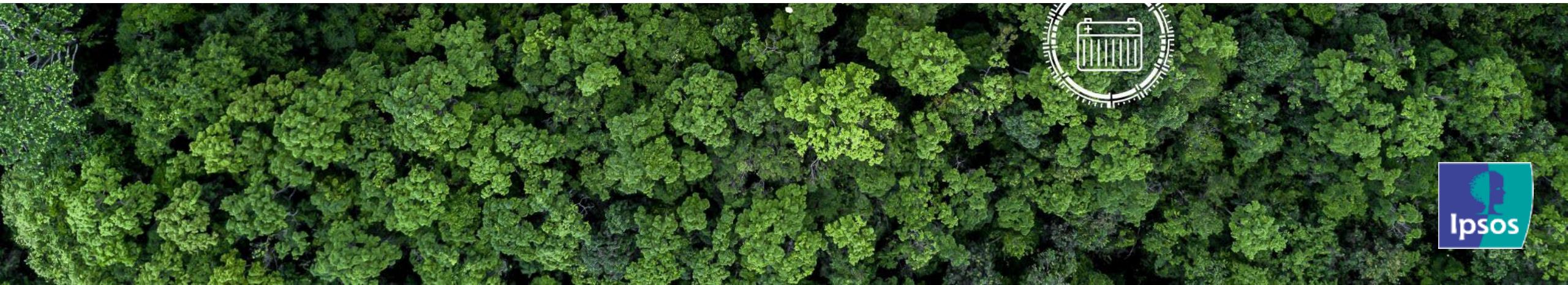
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MOBILITY AND FLEET BAROMETER 2024



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? p44

05
What changes are to be expected in the near future regarding energy mix? p52

06
What are the perspectives in terms of mobility solutions ? p99

07
What are the usages in terms of connected vehicles, digital tools and road safety equipments? p134

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1

CONTEXT AND METHODOLOGY





KEY THEMES FOR ARVAL MOBILITY OBSERVATORY



1

WHAT SHORT TERM SHIFTS ARE SHAPING THE MARKET?



2

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



3

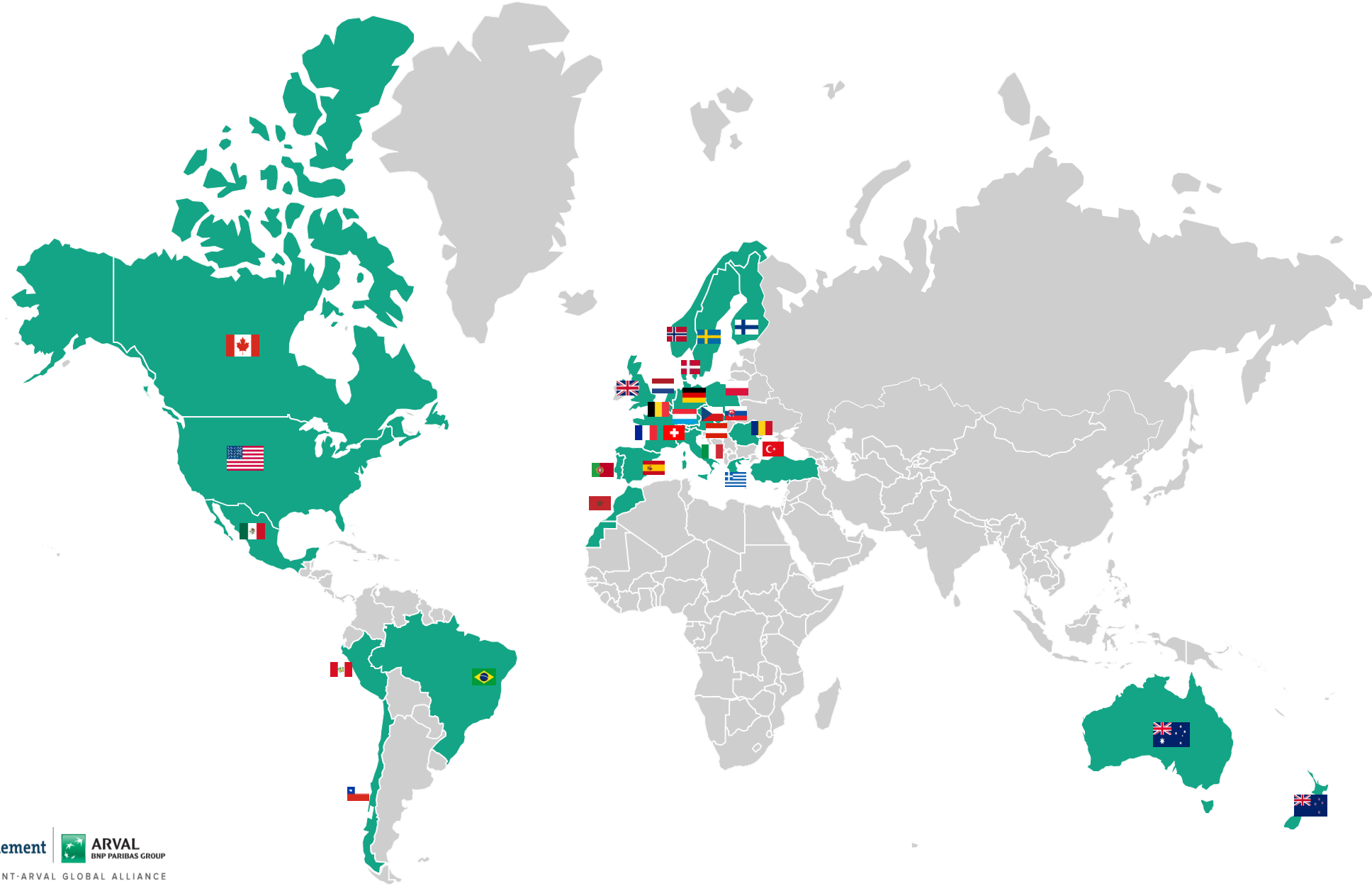
HOW DO MOBILITY SOLUTIONS IMPACT FLEET MANAGEMENT?

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SCOPE OF THE SURVEY : 30 COUNTRIES



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COMPANY SIZE SEGMENT DEFINITION



WORLD

EUROPE

OUT OF EUROPE

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

METHODOLOGY








DATA COLLECTION METHOD	FIELDWORK PERIOD	TARGET	QUOTAS	SAMPLE	DURATION OF INTERVIEW
CATI SYSTEM (Computer Assisted Telephone Interviewing) Recruitment by telephone	AUG 21 → NOV 8	COMPANY FLEET DECISION MAKERS in companies of all industries using at least 1 CORPORATE VEHICLE	COMPANY SIZE & SECTOR	5854 Europe 1650 Americas 1101 Rest of the world (TR,MA,AU,NZ) **8605** Interviews in total	**26** minutes on average

READING NOTES ABOUT THE REPORT

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

- ↗ XX — Significantly higher than 2023 year
- XX — Significantly higher than 2022 year
- XX = score 2023 or 2022
- ↘ XX — Significantly lower than 2023 year
- ▼ XX — Significantly lower than 2022 year
- XX = score 2023 or 2022

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

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

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NUMBER OF INTERVIEWS CONDUCTED IN MEXICO

Perimeter of the survey: companies owning at least 1 vehicle

Companies with Less than 10 empl.
83 INTERVIEWS

Companies with 10 - 99 empl.
49 INTERVIEWS

Companies with 100 - 249 empl.
67 INTERVIEWS

Companies with 250 empl. or more
51 INTERVIEWS

1 to 99 employees
132 INTERVIEWS

100 employees and more
118 INTERVIEWS

SAMPLE STRUCTURE IN MEXICO

Company size & sector

In %

					TOTAL
Construction Building Construction General Contractors And Operative Builders / Heavy Construction Other Than Building Construction Contractors / Construction Special Trade Contractors	2	11	4	5	5
Industry Mining, oil & gas, Manufacturing (e.g. food, tobacco, textile, wood, furniture, printing, publishing, chemicals, fabricated metal products, electronic, machinery, etc…)	8	18	18	5	12
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	47	33	38	34	39
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	44	39	40	56	44
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



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



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: FLEET MANAGERS ARE STILL OPTIMISTIC ABOUT FLEET SIZES BUT WATCH OUT LARGEST COMPANIES EXPECTING A DECREASE IN THEIR PASSENGER CARS FLEET

#1

HOMEWORKING MAY IMPACT FLEET MANAGEMENT IN THE NEAR FUTURE

- **More than 1 out of 3 Mexican companies expect an increase in their fleet size** within the next 3 years (somehow above the global average) and half expect a stability of the number of vehicles in their fleet.
- But **watch out the significant increase of the number of companies expecting a reduction of their passenger cars fleet size, driven by the >250-employee companies** – the « increase – decrease » balance stays positive and above global average on this segment though. Besides, fleet growth potential for LCVs is more stable.
- **Fleets growth expectations are driven by business development first**, like globally. HR related needs (talent recruitment, employee retainment) and offering vehicles to employees with no company car eligibility are also at stake, but to a much lower extent.
- **Vehicles possession length is steady** (5,7 years) and in line with the global average, LCVs tend to be renewed somehow later than passenger cars. The picture is the same whatever the company sizes considered.
- **Second-hand vehicles are used by a high number of companies** in Mexico (quite ahead of the global average) – passenger cars more often than LCVs, and pool cars and tool cars mainly.
- As for the **development of homeworking, 1 out of 5 companies has changed or considers changing its mobility policy** to take it into account, mainly through changing policy in terms of mileage or models and through the introduction of car sharing.
- **Adjusting to new ways of working (hybrid between home and office) is the main challenge** that fleet managers have to face in Mexico and even reinforced since last year. Adapting to restrictive public policies on petrol and diesel vehicles and mitigating the increase of total cost of ownership of the vehicles are also at stake.

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INSIGHT 2: CREDIT IS STILL THE MAIN FINANCING METHOD USED, CHALLENGED BY OUTRIGHT PURCHASE AND BY OPERATING LEASING

#2

OPERATING LEASING SHOULD GROW AMONG THE SMALLEST COMPANIES

- **Credit comes as the #1 financing method used** by Mexican companies, closely followed by outright purchase and operating. The picture is the same for passenger cars and for LCVs more specifically.
- To note a **robust growth potential for operating leasing**, more than half of the companies now intending to introduce or to increase the use of this method, **strongly driven up by the <10-employee companies**.

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INSIGHT 3: A STILL SLOW ADOPTION OF ALTERNATIVE FUEL TECHNOLOGIES

#3

HEV STILL FAVORED TO PHEV AND 100% BEV

- In Mexico, **adoption of alternative fuel technologies is somehow lower than global average**: two thirds of the Mexican companies consider or have already implemented at least one alternative fuel technology for passenger cars, and 4 out of 10 have already implemented.
- **HEV comes as the #1 alternative fuel technology chosen for passenger cars** within Mexican companies, still slightly below the global level. PHEV and 100% BEV remain far behind. **HEV is also the technology showing the strongest growth potential** – and the only one being in line with the global picture.
- As for LCVs specifically, the implementation of alternative fuel technologies – 100% BEV or Fuel Cell – is also below the global trend.
- Several factors drive the implementation of alternative fuel technologies for passenger cars. They are mainly related to the **reduction in the fuel expenses, to the lower environmental impact, and to the compliance with CSR policy**.
- As **for LCVs, the anticipation of future restrictive policies comes as the #1 driver** – the reduction in the fuel expenses and the lower environmental impact being distanced.
- **The higher purchase price and the charging difficulties remain the strongest barriers to adoption of 100% BEV**. To date, 6 out of 10 companies have no charging points installed at their premises.
- **Petrol and diesel should still weight the most in terms of motorization in the next 3 years**, especially for LCVs – in line with the global results.
- Only a **few companies are eligible to an ESG regulatory public reporting today** but a total of 7 out of 10 will be eligible in the next 2 years. Employees mobility is of high importance for 3 out of 10 among them in this perspective.

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INSIGHT 4: GOOD LEVEL OF MOBILITY SOLUTIONS IMPLEMENTATION

#4

MOBILITY BUDGET AND CAR/CASH ALLOWANCE TO GROW AMONG LARGE COMPANIES

- **Mobility solutions have been adopted by 8 out of 10 Mexican companies** to date, somehow above the global average.
- **The most widespread mobility solutions are car/cash allowance, public transport and mobility budget**. Mobility budget and car/cash allowance are the ones considered the most, driven up by the >100-employee companies.
- The development of mobility solutions is mostly **fueled by HR related needs (talent recruitment, employee retainment), brand's image and compliance with CSR policies**. They remain mostly considered as add-ons to corporate vehicles.
- Almost **half of Mexican companies have implemented a mobility plan**.
- **Private cars and public transport are the main means to commute** for the employees by far.

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INSIGHT 5: HIGH USE OF TELEMATICS IN MEXICO

#5

LARGE COMPANIES MORE EQUIPPED WITH CONNECTED VEHICLES

- Usage of telematics is widely widespread in Mexico, with **6 out of 10 companies being equipped with connected vehicles**, ahead of the global average. Same level of equipment for passenger cars and for LCVs.
- To note, **large companies are more equipped** with connected vehicles – 8 out of 10 among the >250-employee companies.
- Overall, **3 out of 4 companies are already using or consider using the data coming from the vehicle box thanks to a telematics platform** in the next 3 years. Current usage is limited but still somehow above the global average though.

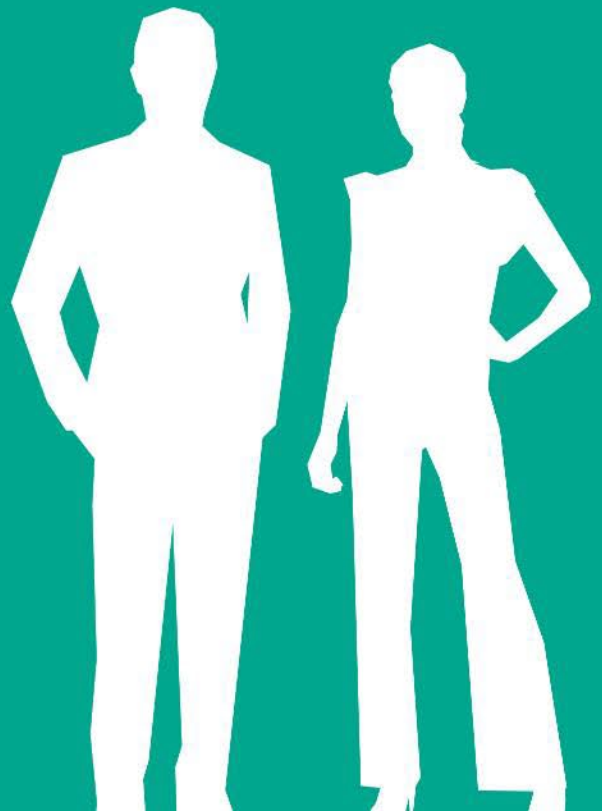
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3

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





FLEET MANAGERS ARE STILL OPTIMISTIC ABOUT FLEET SIZES BUT WATCH OUT LARGEST COMPANIES EXPECTING A DECREASE IN THEIR PASSENGER CARS FLEET

1

Mexican fleet managers are rather optimistic about their fleet size. More than 1 out of 3 expect an increase within the next 3 years (somehow above the 29% global average) and half expect a stability of the number of vehicles in their fleet.

To note though, a significant increase (14%, +8 pts) of the number of companies expecting a reduction of their passenger cars fleet size, driven by the >250 employees companies (18%, +18 pts) – the « increase – decrease » balance stays positive and above global average on this segment though (+24 vs +20). Besides, fleet growth potential for LCVs is more stable.

2

Business development is the main driver of fleets growth expectations (79%), like globally. HR related needs (talent recruitment, employees retainment) and offering vehicles to employees with no company car eligibility are also at stake, but to a much lower extent.

Vehicles possession length is steady (5,7 years) and in line with the global average (5,5), LCVs tend to be renewed somehow later than passenger cars. The picture is the same whatever companies sizes are considered.

3

A high number of companies (67%, quite ahead of the 43% global average) use second-hand vehicles in Mexico – passenger cars (47%) more often than LCVs (34%), and pool cars and tool cars mainly.

4

1 out of 5 companies has changed or considers changing its mobility policy to take the development of homeworking into account, mainly through changing policy in terms of mileage or models (36% already implemented) and through the introduction of car sharing (29%).

Adjusting to new ways of working (hybrid between home and office) is the main challenge that fleet managers have to face in Mexico and even reinforced since last year. Adapting to restrictive public policies on petrol and diesel vehicles and mitigating the increase of total cost of ownership of the vehicles are also at stake.

FLEET PROFILE





MOBILITY POLICY ADAPTATION COINCIDING WITH HOMEWORKING

21%

changed the policy or consider changing

16%



FLEET POSSESSION LENGTH

5.7 years

5.5 years

5.6





ANTICIPATED FLEET EVOLUTION

(% will increase or remain stable)

91%

91%

RESPONDENTS POSITION WITHIN THE COMPANY

In %

Passenger cars + LCVs







CEO / Managing director	18	27
Fleet director / manager	19	18
Procurement director / manager	17	12
Finance director / officer / manager / CFO	11	11
HR director/ manager	19	9
COO (Chief Operations Officer)	4	8
CSR director / officer / manager	4	6
Facility manager	6	5
Mobility manager	2	3
Other, please specify	1	2

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

NUMBER OF VEHICLES IN FLEET

In %

Passenger cars + LCVs



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

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

(among companies with at least one vehicle in fleet)

In %

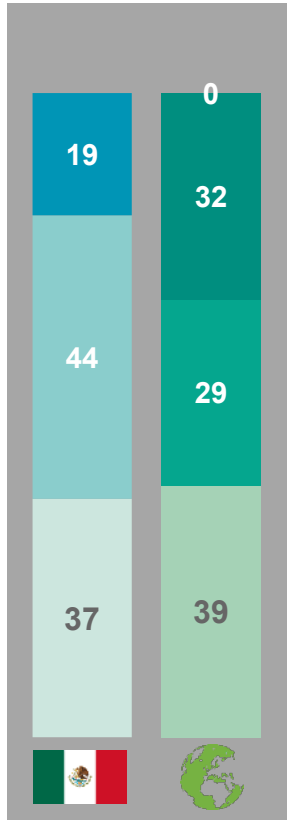
		TOTAL				
PASSENGER CARS		99	100	98	100	98
		98	97	98	100	100
VANS OR LCVs		99	100	100	99	98
		99	98	97	99	99

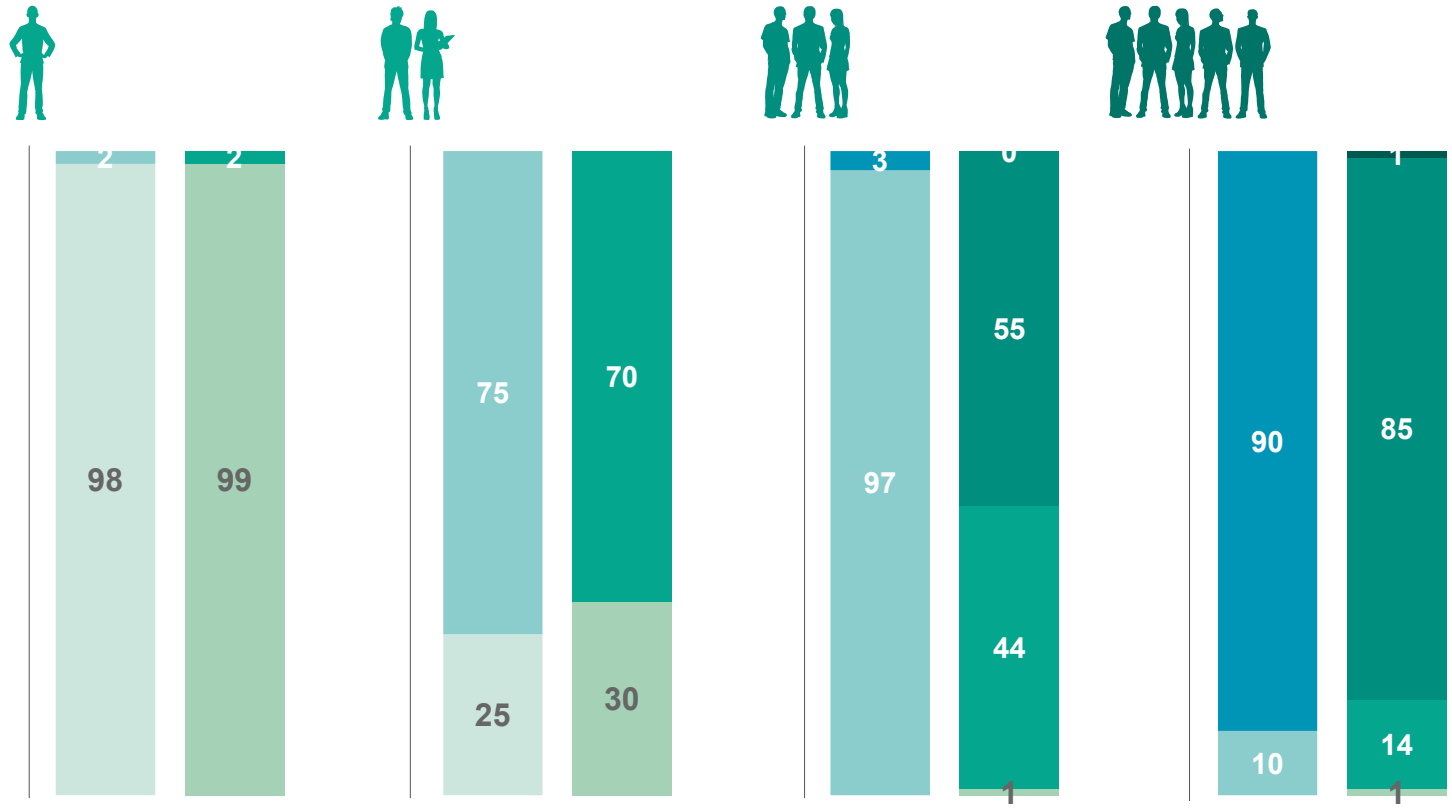
And can you please tell us the total number of cars in your fleet? / And can you please tell us the total number of LCVs or vans in your fleet?
Basis: companies with corporate vehicles = 100%

NUMBER OF PASSENGER CARS IN FLEET

In %

Passenger cars





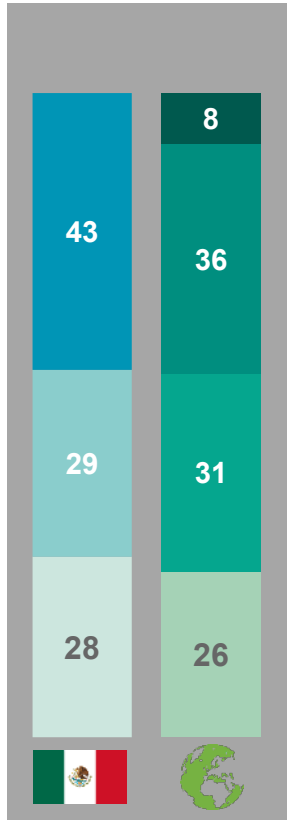
And can you please tell us the total number of cars in your fleet?
Basis: companies with passenger cars

NUMBER OF LCVS IN FLEET

In %

LCVs

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





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

VEHICLES POSSESSION LENGTH



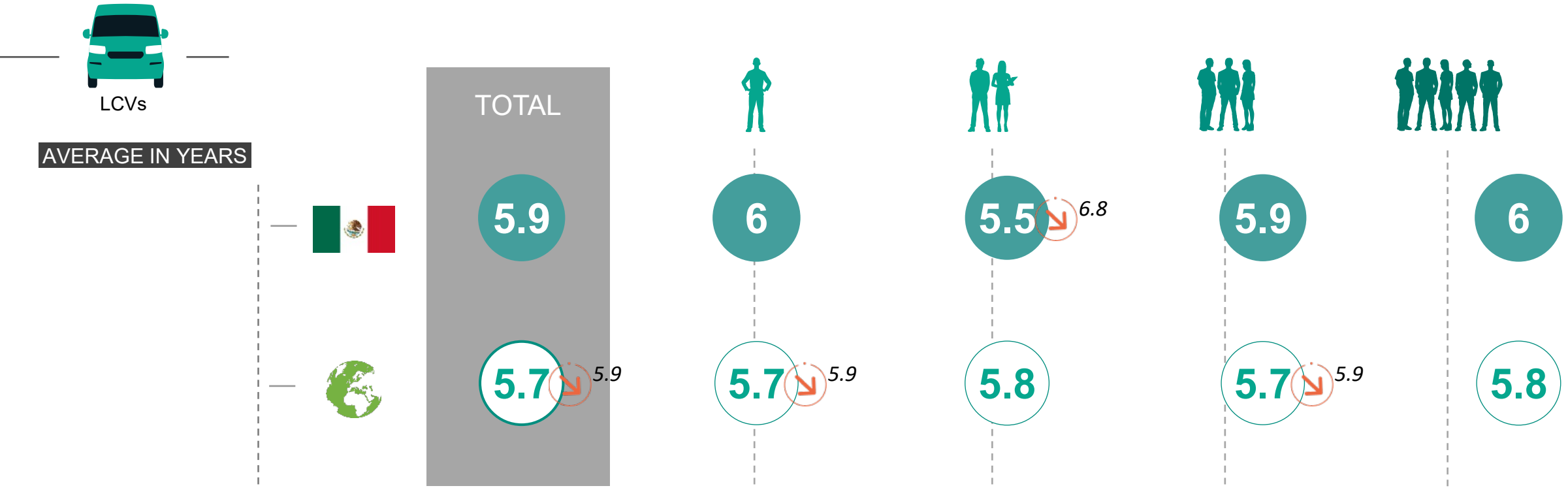
On average, how long do you keep your vehicles (before being sold or giving back to the leasing company)?
Basis: companies with corporate vehicles = 100%

PASSENGER CARS POSSESSION LENGTH



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

LCVS POSSESSION LENGTH



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

FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Mexico, 91% of the companies declare that in the next 3 years their company fleet will remain stable or increase.

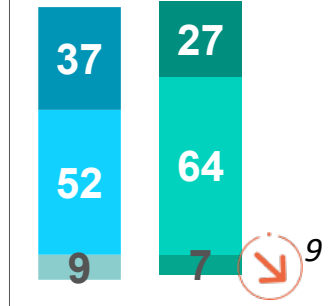
In %

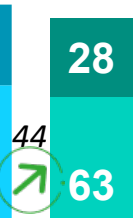
Passenger cars + LCVs





	TOTAL									
% Stable or increase	**91**	**91**	**89**	**91**	**96**	**91**	**90**	**92**	**90**	**90**
Increase	36	28	37	27	29	28	36	29	42	27
Remain stable	55	63	52	64	67	63	54	63	49	64
Decrease	8	7	9	7	4	6	10	6	10	8











BALANCE in pts (INCREASE ⊖ DECREASE)

2024	+28	+21	+28	+20	+25	+21	+26	+23	+32	+19
2023	+30	+20	+22	+19	+36	+22	+22	+19	+46	+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 Mexico, 91% of the companies declare that in the next 3 years their company fleet will remain stable or increase.

In %

Passenger cars + LCVs



	AT	CH	DE	ES	FR	GR	IT	PT	UK	BE	LU	NL	CZ	PL	SK	RO	DK	FI	NO	SE	MA	TR	BR	CL	PE	US	CA	MX	AU	NZ	91	91
% 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	7	6
Increase	21	21	20	25	30	42	18	16	38	23	21	27	22	29	19	27	19	27	20	19	50	40	28	28	54	35	33	36	23	18		
Remain stable	70	72	69	67	62	51	75	78	56	68	71	61	64	63	71	61	67	67	73	77	41	55	59	50	41	58	59	55	67	77		
Decrease	5	5	10	5	7	5	5	6	5	8	4	5	12	6	8	8	12	4	6	2	6	4	8	20	2	7	8	8	9	4		

	2024	2023	2022
AT	+17	+17	+18
CH	+15	+11	+13
DE	+10	+13	+18
ES	+20	+14	+16
FR	+22	+21	+24
GR	+37	+34	+24
IT	+13	+19	+18
PT	+10	+9	+22
UK	+33	+24	+27
BE	+15	+14	+13
LU	+17	+15	+19
NL	+22	+15	+23
CZ	+10	+9	+7
PL	+23	+24	+22
SK	+11	+7	+13
RO	+20	+22	+23
DK	+7	+8	+10
FI	+24	+22	+21
NO	+14	+12	+11
SE	+16	+12	+14
MA	+44	+46	+33
TR	+36	+34	+14
BR	+21	+21	+19
CL	+9	+26	+24
PE	+52	+44	+49
US	+28	+23	-
CA	+25	+24	-
MX	+28	+30	-
AU	+15	+11	-
NZ	+13	+16	-
91	+21	+20	+20
91	+18	+16	+18

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

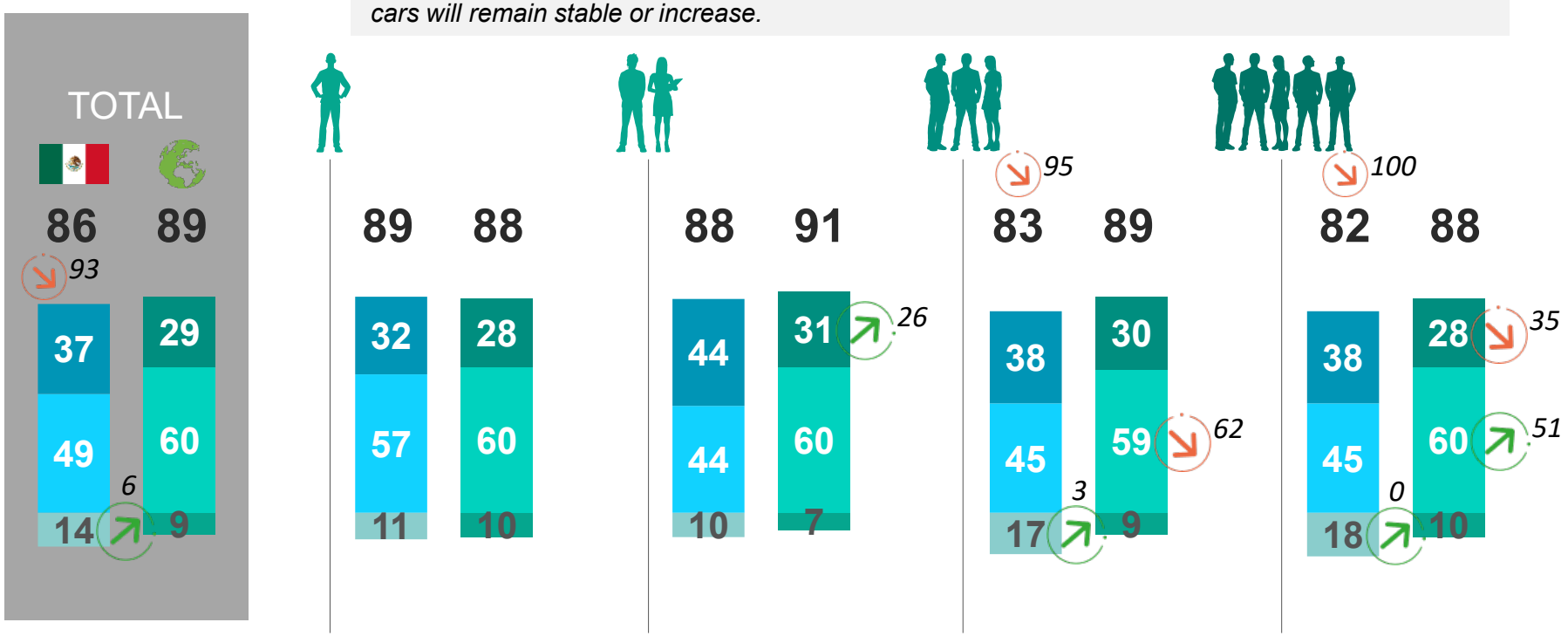
PASSENGER CAR FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Mexico, 86% 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	+24	+20	+22	+19	+33	+24	+21	+21	+20	+18
2023	+30	+20	+20	+19	+28	+18	+32	+19	+47	+24

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

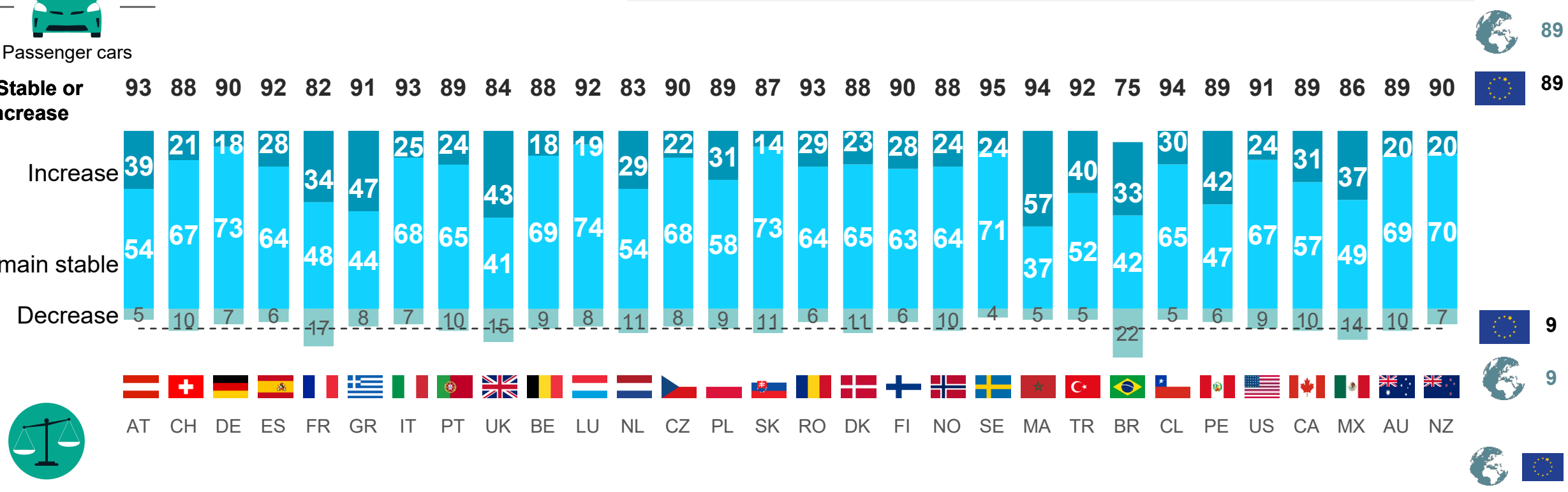
PASSENGER CAR FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Mexico, 86% of the companies declare that in the next 3 years their company fleet of passenger cars will remain stable or increase.

In %

Passenger cars



	AT	CH	DE	ES	FR	GR	IT	PT	UK	BE	LU	NL	CZ	PL	SK	RO	DK	FI	NO	SE	MA	TR	BR	CL	PE	US	CA	MX	AU	NZ		
2024	+34	+10	+11	+22	+17	+39	+18	+14	+28	+10	+11	+18	+14	+22	+3	+23	+13	+22	+14	+20	+53	+35	+11	+25	+36	+15	+21	+24	+10	+13	+20	+18
2023	+27	+12	+9	+20	+21	+32	+17	+9	+28	+15	+15	+18	+15	+24	+6	+21	+8	+21	+13	+16	+44	+34	+18	+21	+33	+21	+21	+30	+11	+15	+20	+17

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

Basis: companies with passenger cars

LCVS FLEET GROWTH POTENTIAL

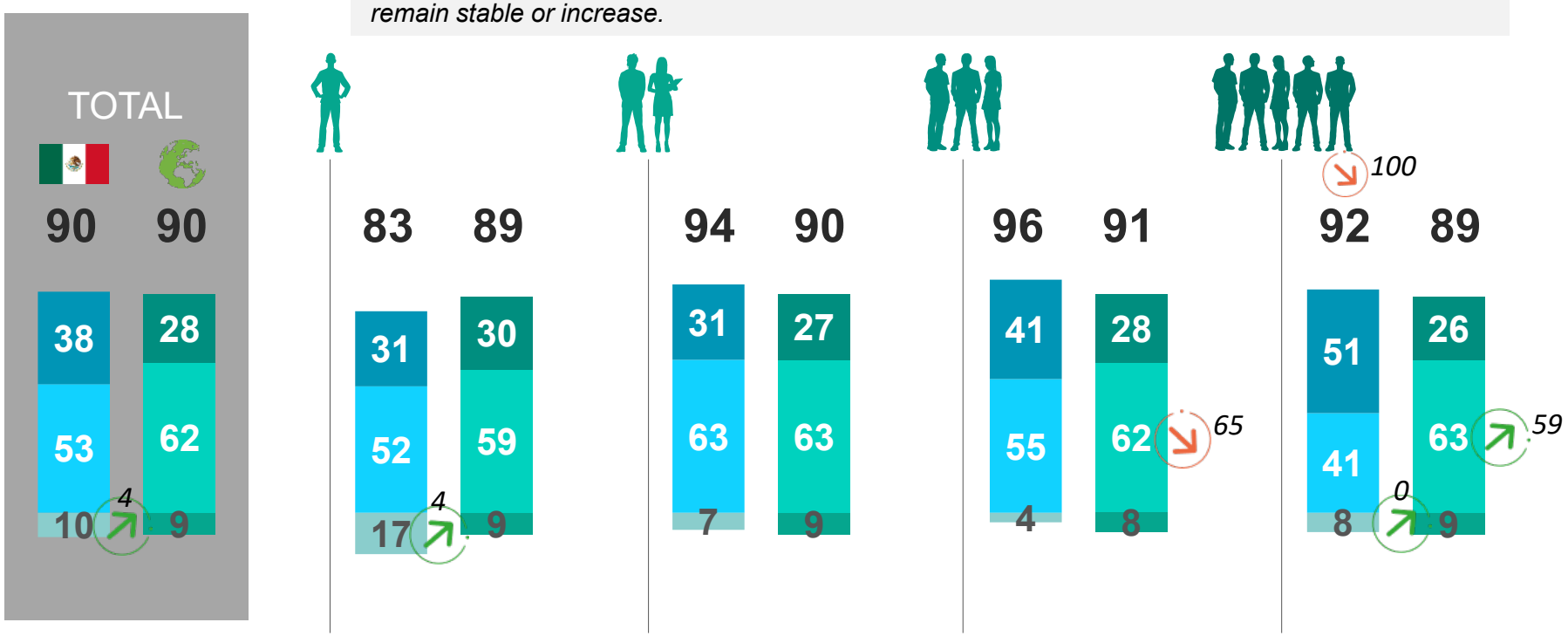
HOW TO READ THE RESULTS ?

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

In %



LCVs



BALANCE in pts (INCREASE ⊖ DECREASE)

2024	+28	+19	+14	+20	+24	+18	+37	+20	+43	+17
2023	+31	+19	+30	+21	+24	+18	+26	+19	+44	+20

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

Basis: companies with LCVS

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ELEMENT-ARVAL GLOBAL ALLIANCE

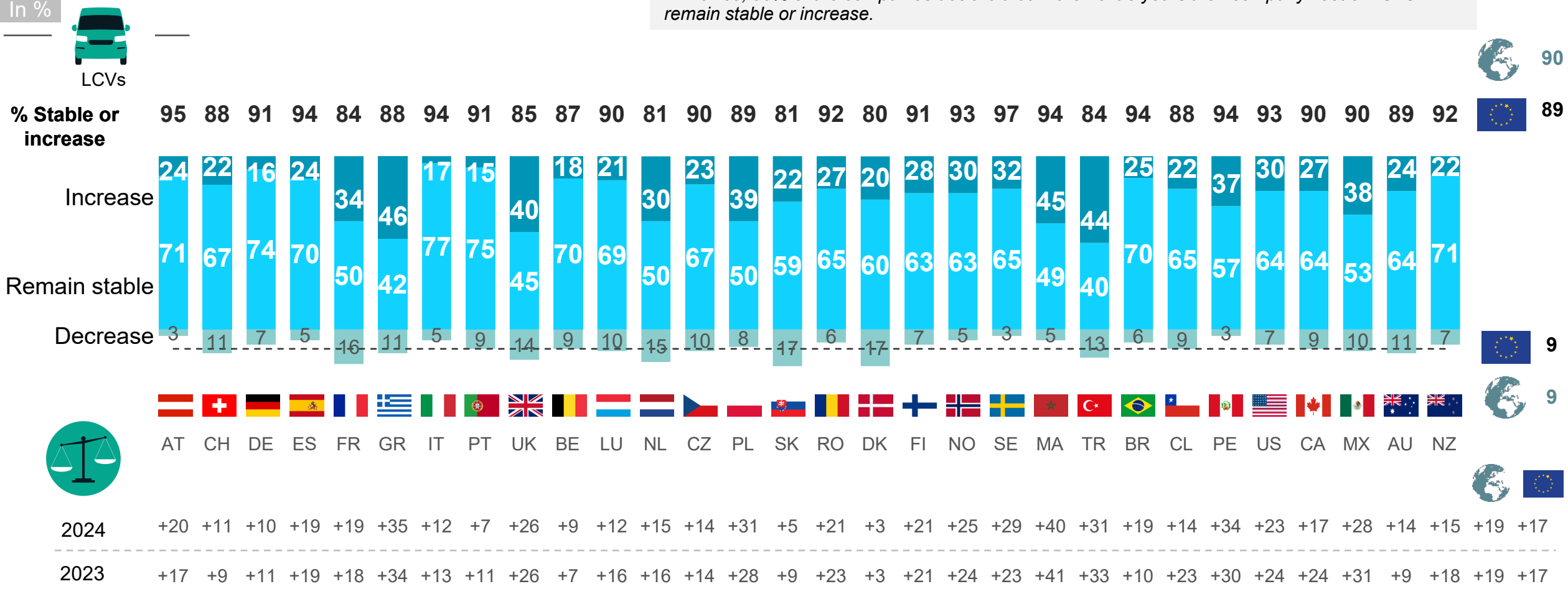
LCVS FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

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

In %

LCVs



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

Basis: companies with LCVS

Arval Mobility Observatory

element | ARVAL BNP PARIBAS GROUP

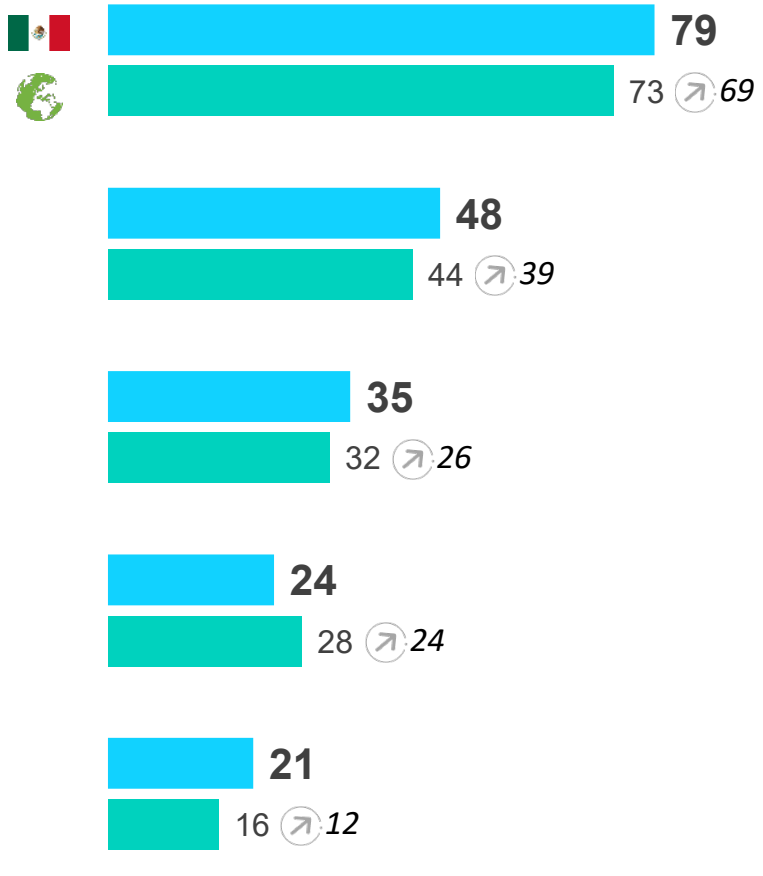
ELEMENT-ARVAL GLOBAL ALLIANCE

REASON FOR FUTURE FLEET INCREASE

In %

Passenger cars + LCVs





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

XX Significantly higher than 2023 year
XX = score 2023

XX Significantly lower than 2023 year
XX = score 2023

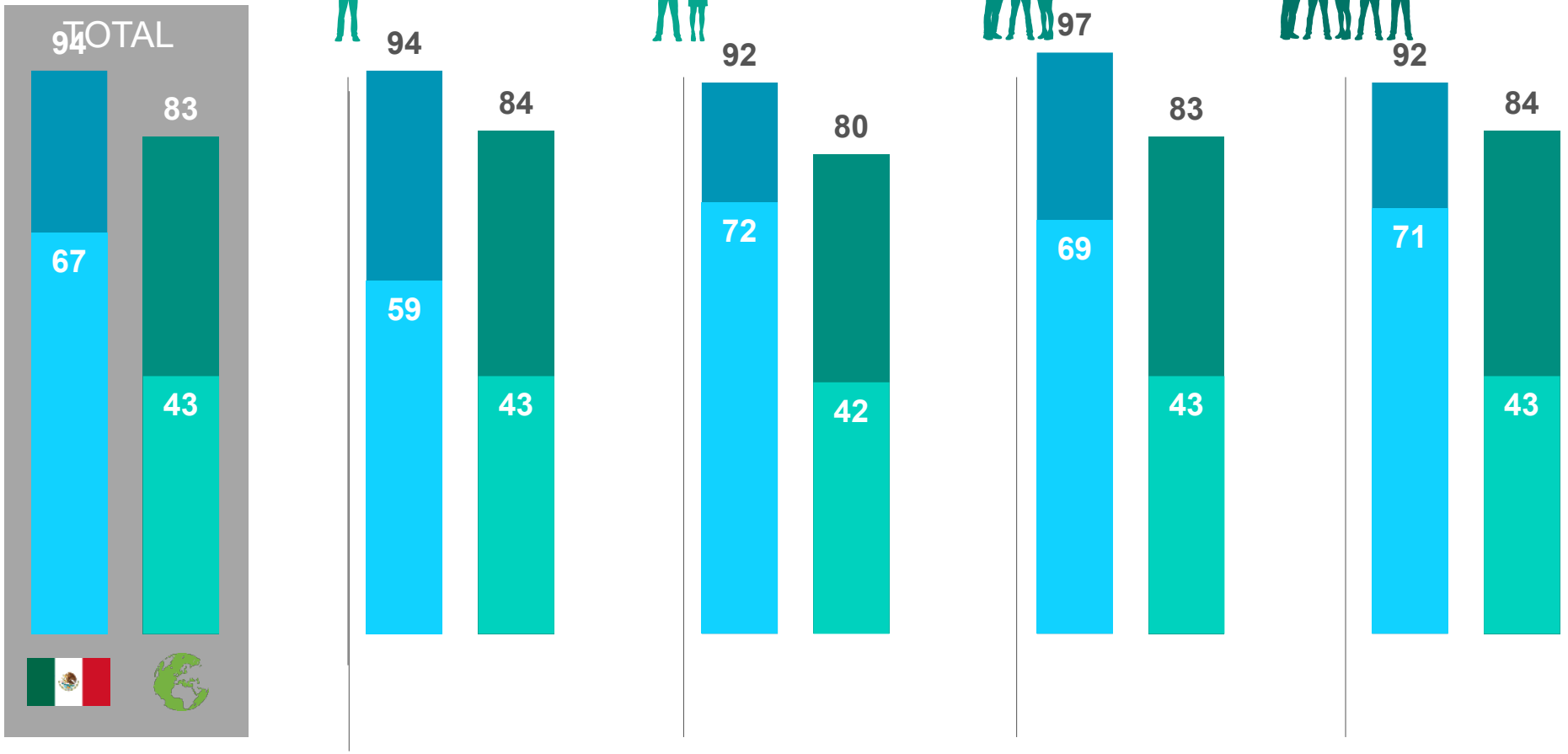
SECOND-HAND VEHICLES

HOW TO READ THE RESULTS ?

In Mexico, 94% of the companies are already using or consider to use second-hand vehicles in the next 3 years. 67% of the companies are currently using some.

In %

Passenger cars + LCVs



ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

ALREADY USING

New question added in 2024

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

Basis: companies with corporate vehicles = 100%

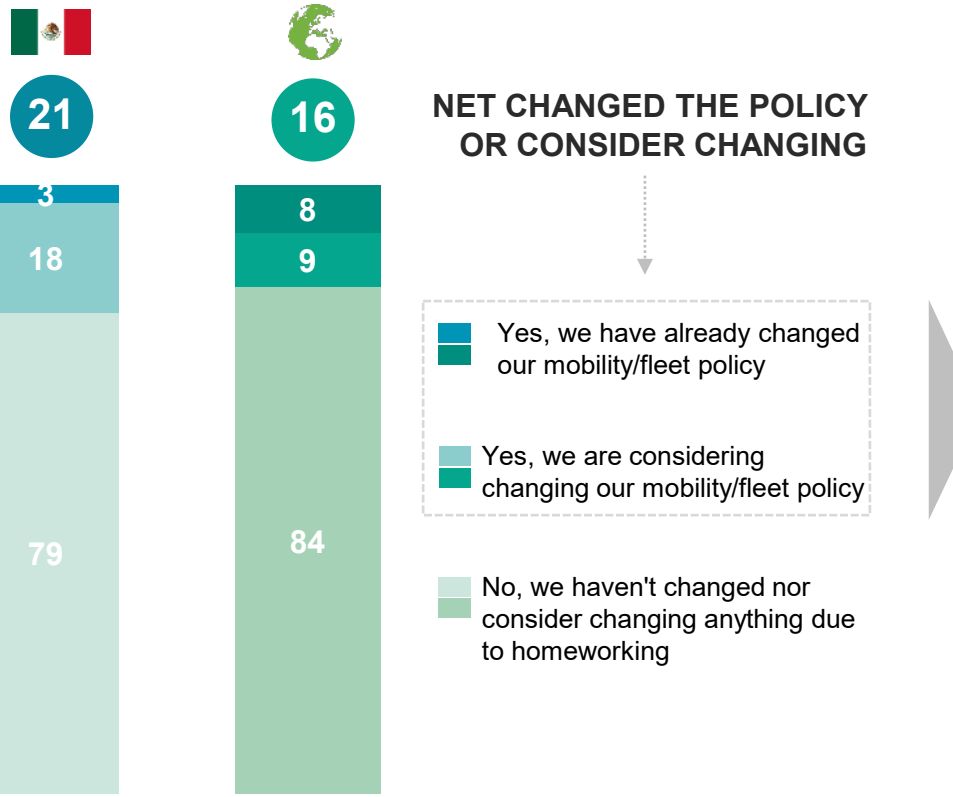
MOBILITY POLICY ADAPTATION COINCIDING WITH HOMEWORKING

HOW TO READ THE RESULTS ?

In Mexico, among the companies that changed or consider changing their mobility policy, 6% have already reduced the total number of the vehicles in the company's fleet.

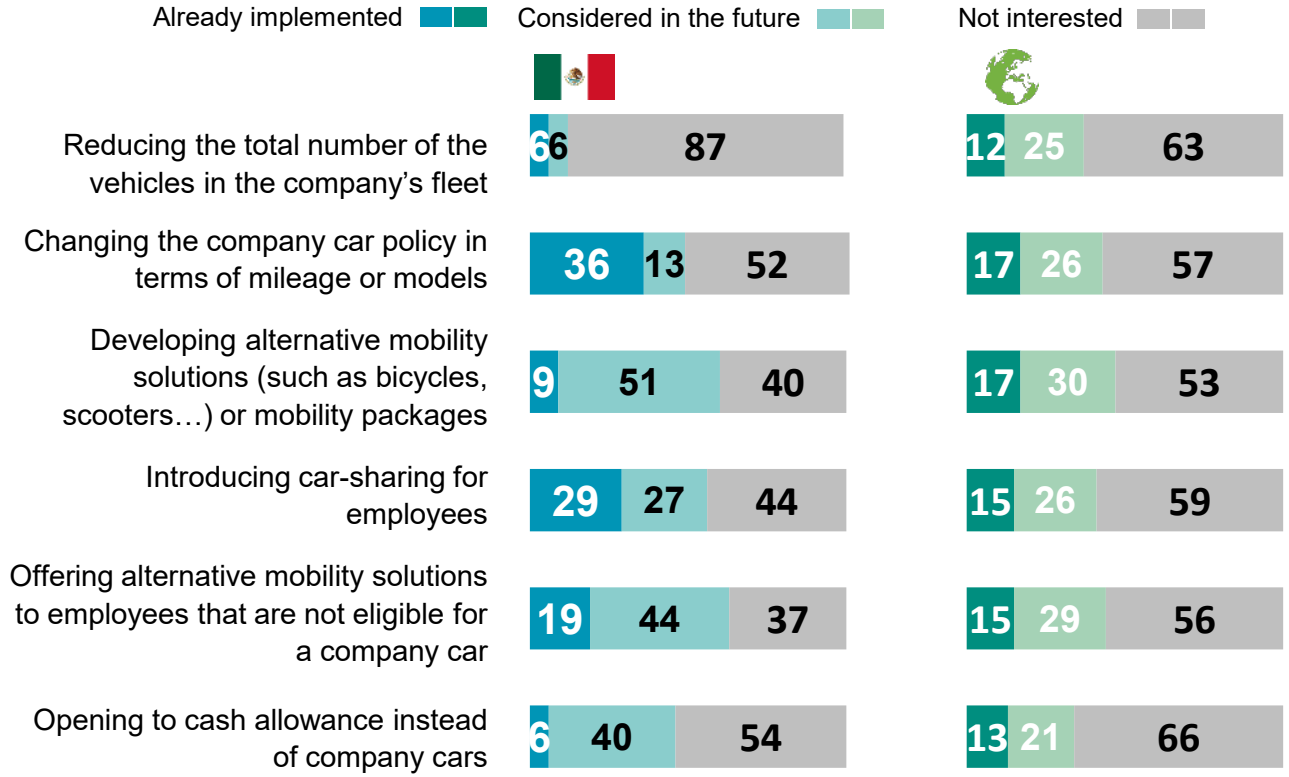
In %

Passenger cars + LCVs



NET CHANGED THE POLICY OR CONSIDER CHANGING

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



Basis: companies with corporate vehicles = 100%

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

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

Question asked to respondents that are aware of mobility solutions

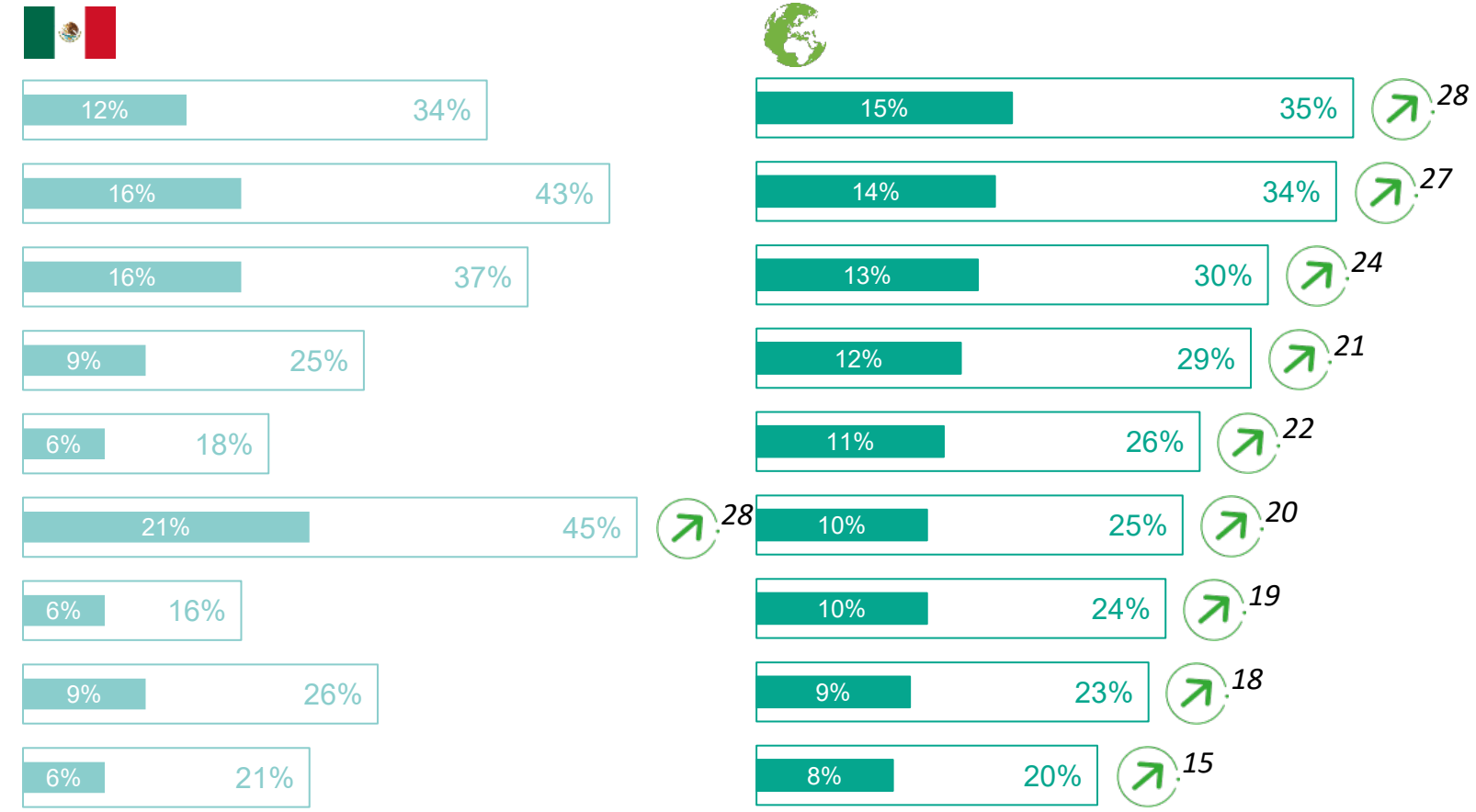
MOST IMPORTANT CHALLENGES EXPECTED

In %

Passenger cars + LCVs

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?





CREDIT IS STILL THE MAIN FINANCING METHOD USED, CHALLENGED BY OUTRIGHT PURCHASE AND BY OPERATING LEASING, SHOWING STRONG GROWTH POTENTIAL AMONG THE SMALLEST COMPANIES

1. **Credit (27%) is still the main financing method used**, closely followed by outright purchase (25%) and operating leasing (24%). The picture is the same for passenger cars and for LCVs more specifically.

2. **Operating leasing growth potential is strong**, more than half of the companies now intending to introduce or to increase the use of this method, strongly **driven up by the <10 employees companies** (49%, +11 pts vs last year).

FINANCING



OUTRIGHT PURCHASE

25%





CREDIT

27%





OPERATING LEASING

24%





FINANCIAL LEASING

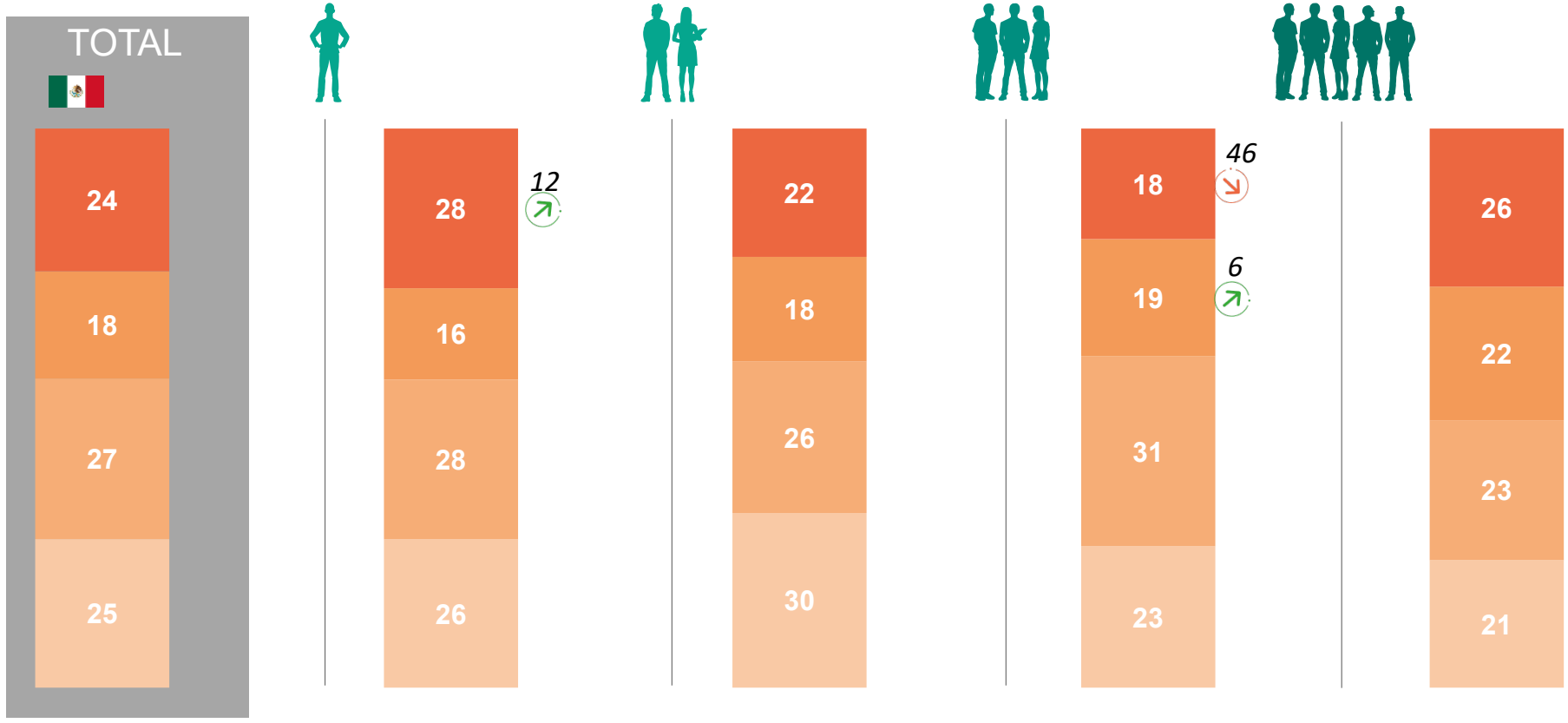
18%



MAIN FLEET FINANCING METHOD

In %

Passenger cars + LCVs



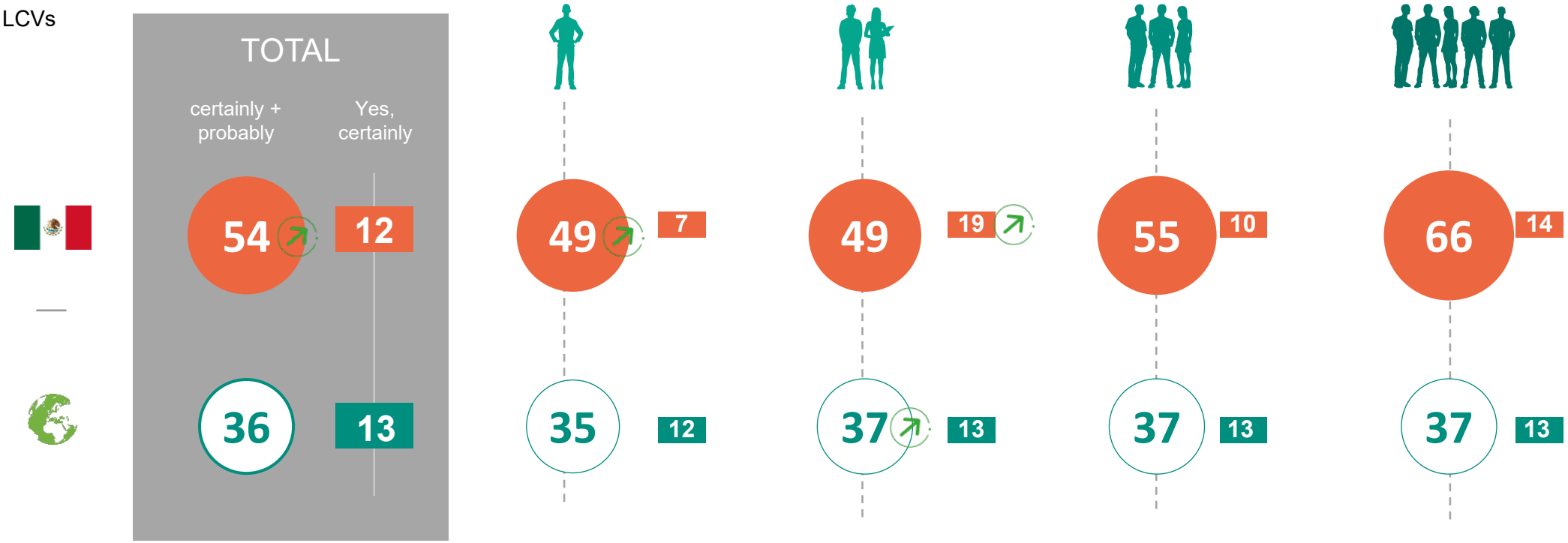
What is the main financing method used to finance your company vehicles today?
Basis: companies with corporate vehicles = 100%

INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATING LEASING

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

In %

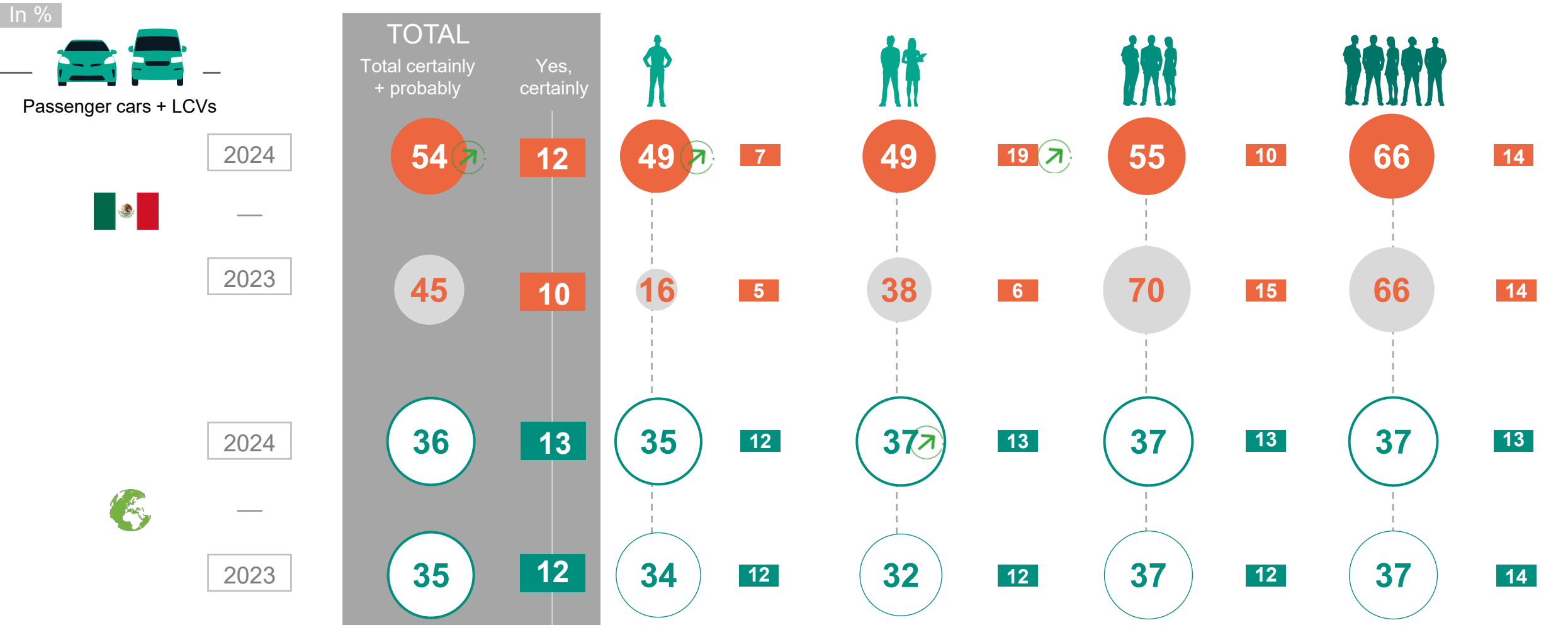
Passenger cars + LCVs



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

INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATING LEASING

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



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

5

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



A STILL SLOW ADOPTION OF ALTERNATIVE FUEL TECHNOLOGIES, HEV BEING STILL FAVORED TO PHEV AND 100% BEV

1

A somehow lower adoption of alternative fuel technologies than global average: 65% of Mexican companies consider or have already implemented at least one alternative fuel technology for passenger cars (vs. 70% globally), and 44% have already implemented (vs. 49%).

HEV is the leading alternative fuel technology for passenger cars within Mexican companies, still slightly below the global level (22% of already implemented vs 24%). PHEV (15% vs 23%) and 100% BEV (15% vs 20%) remain far behind. HEV is also the technology showing the strongest growth potential – and the only one being in line with the global picture.

For LCVs, the implementation of alternative fuel technologies – 100% BEV or Fuel Cell – is also below the global trend (19% of use or consider, vs 31%).

2

The reasons for implementing alternative fuel technologies for passenger cars are diverse and mainly related to the reduction in the fuel expenses (50%), to the lower environmental impact (49%), and to the compliance with CSR policy (47%). As for LCVs, the anticipation of future restrictive policies comes #1 (78%) – the reduction in the fuel expenses (69%) and the lower environmental impact (69% too) being distanced.

Focusing on 100% BEV, the higher purchase price and the charging difficulties remain the strongest barriers to adoption. To date, 6 out of 10 companies have no charging points installed at their premises.

3

Petrol and diesel should still weight the most in terms of motorization in the next 3 years, especially for LCVs (80%, vs 64% for passenger cars) – in line with the global results.

4

Few companies are eligible to an ESG regulatory public reporting today but a total of 7 out of 10 will be eligible in the next 2 years. Employees mobility is of high importance 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

65%

70%



AT LEAST ONE ALTERNATIVE IMPLEMENTED

for Passenger cars

44%

49%



EXPECTED PART OF 100% ELECTRIC PASSENGER CAR IN 3 YEARS

19%

17%

18



EXPECTED PART OF 100% ELECTRIC LCV IN 3 YEARS

5%

9

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 %

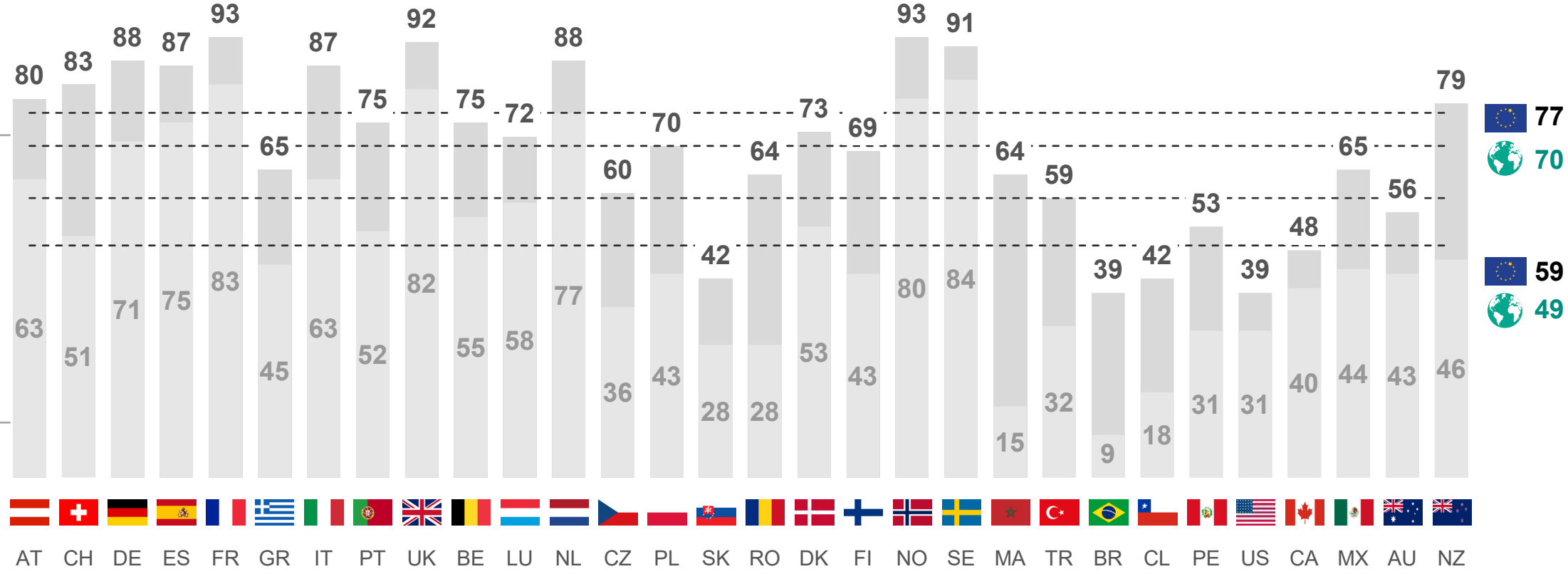
HOW TO READ THE RESULTS ?

In Mexico, 65% of the companies are already using or consider to implement at least one alternative technology in the next 3 years. 44% 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

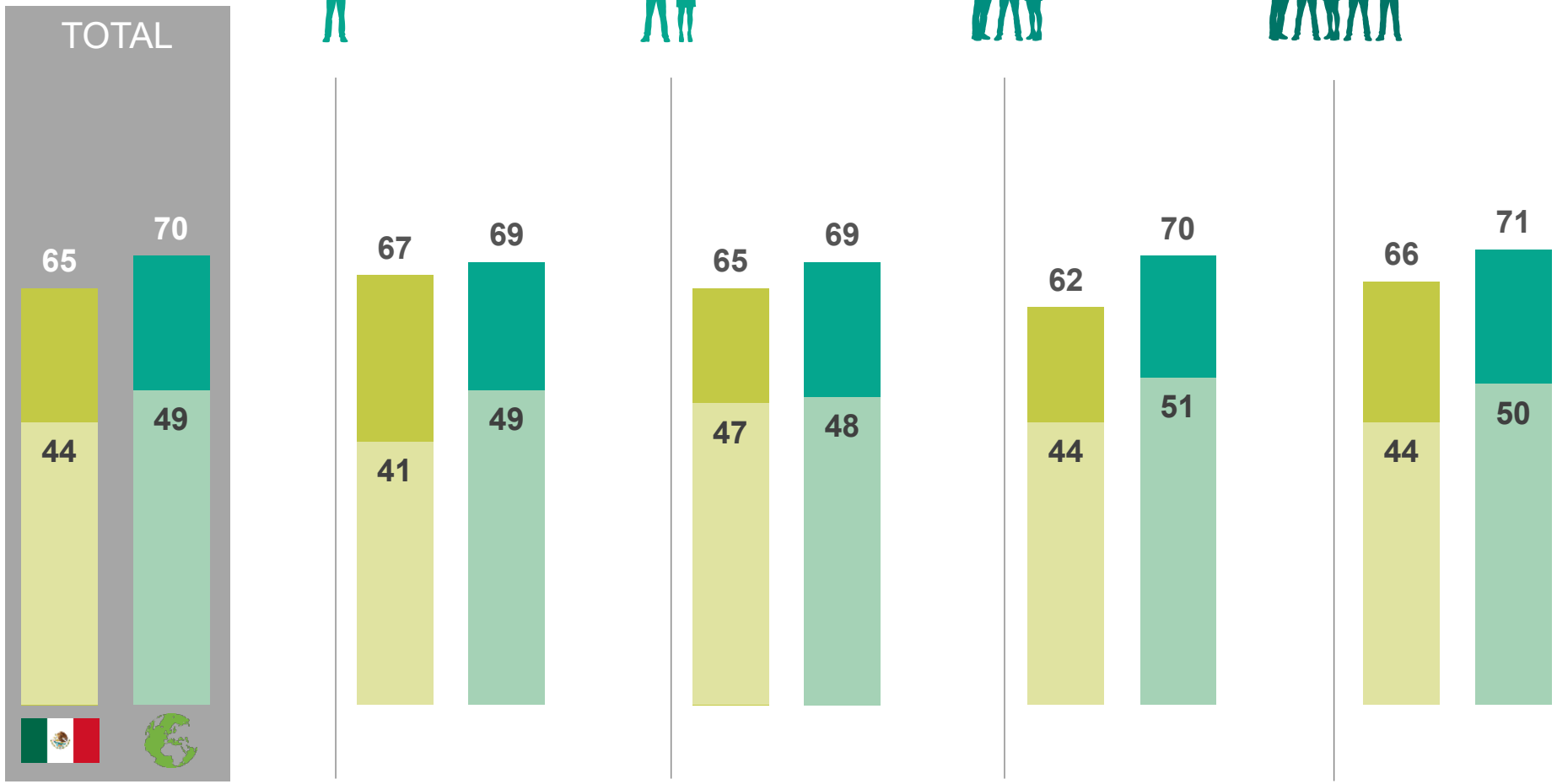
(At least one technology among HEV, PHEV, 100% BEV)

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

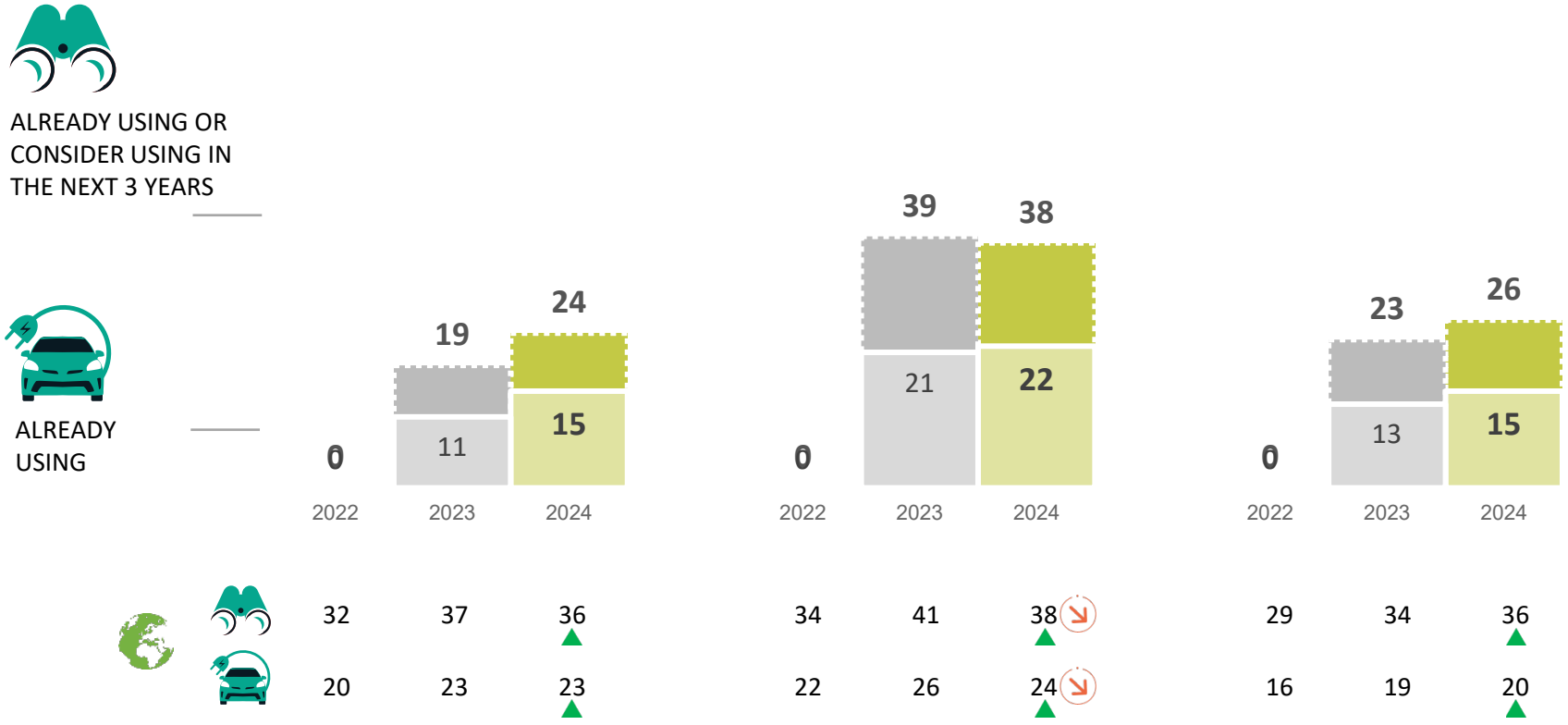
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ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

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

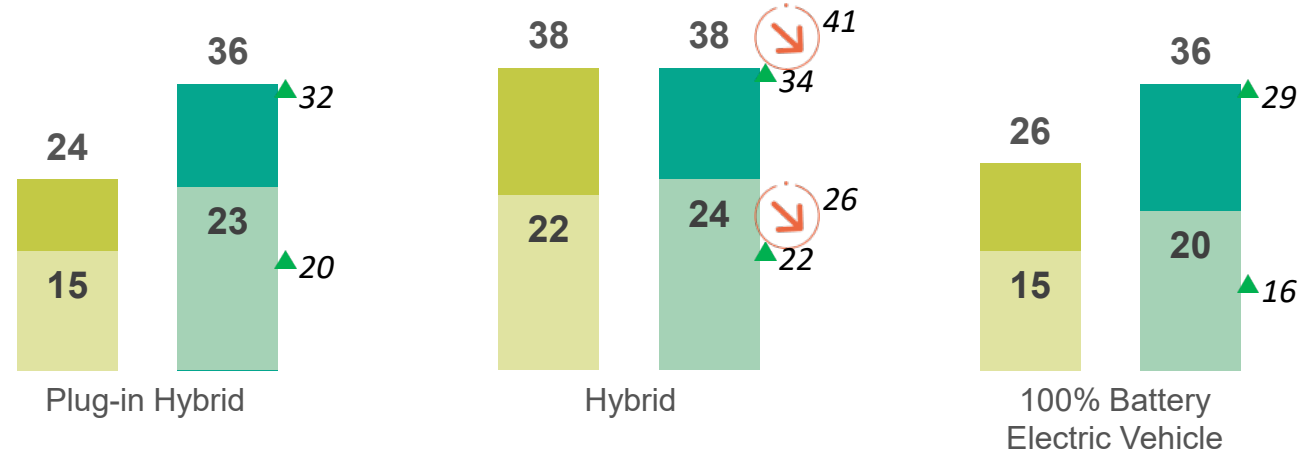
Passenger car fleet

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

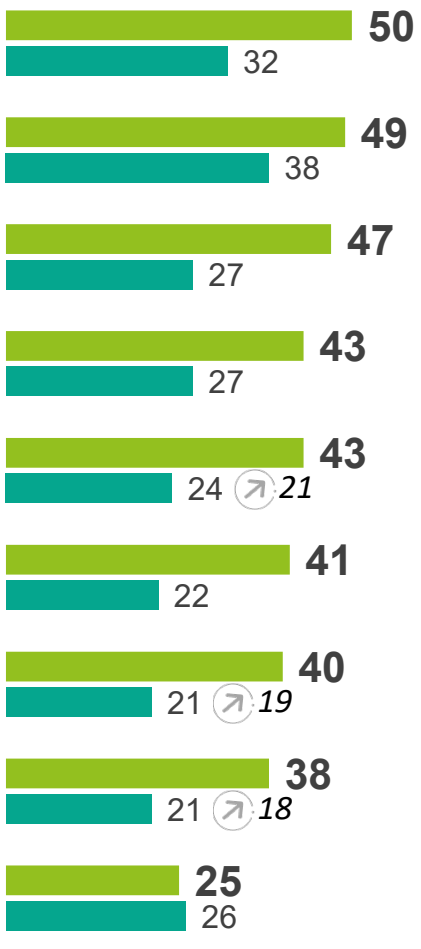
Passenger car fleet

In %



Passenger cars





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

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CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

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

In %

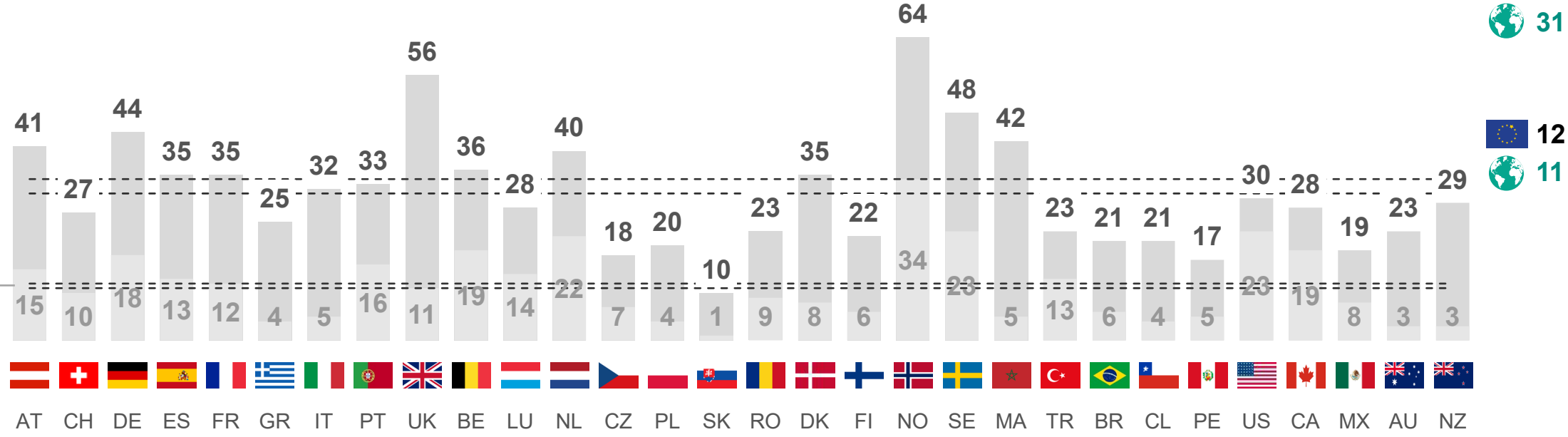
LCVs

HOW TO READ THE RESULTS ?

In Mexico, 19% of the companies are already using or consider to implement at least one alternative technology in the next 3 years. 8% of the companies is currently using at least one.

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

ALREADY USING



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

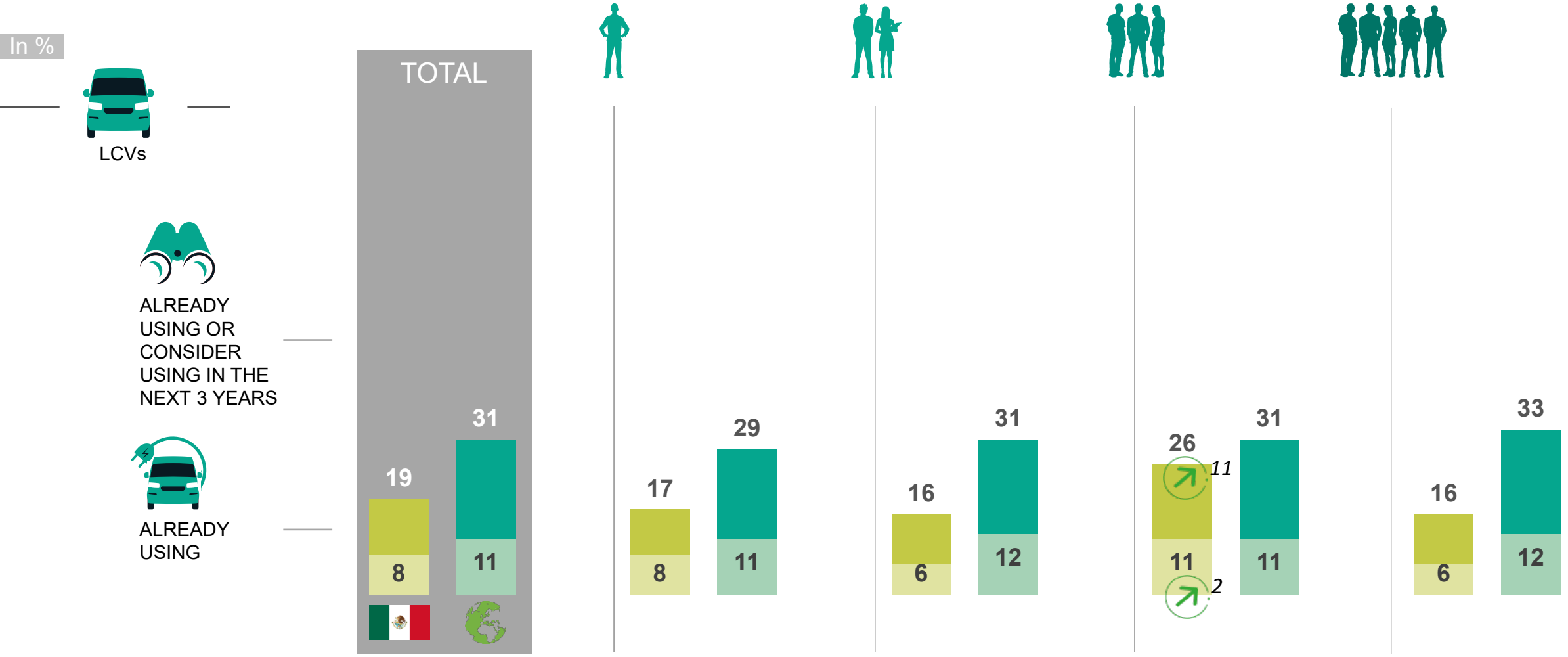
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CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

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



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

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years

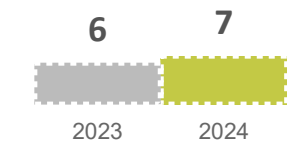
In %

LCVs

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

ALREADY USING





	2022	2023	2024	2023	2024
ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS	21	25	25 ▲	9	9
ALREADY USING	7	9	10 ▲	2	2

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

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

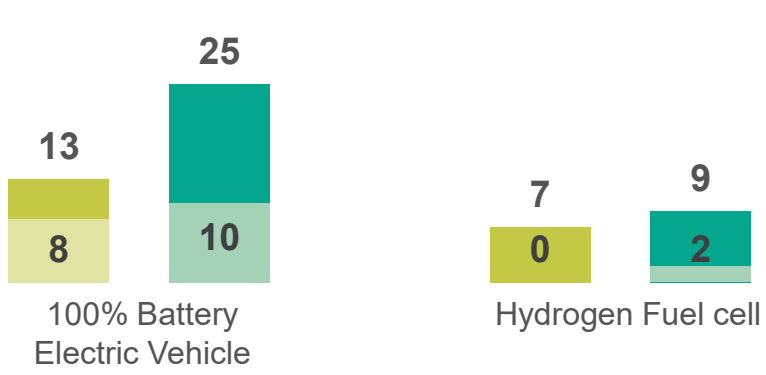
LCV Fleet

In %

LCVs

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

ALREADY IMPLEMENTED



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

REASONS FOR IMPLEMENTING OR CONSIDERING ALTERNATIVE FUEL TECHNOLOGIES

LCV fleet

In %



LCVs



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

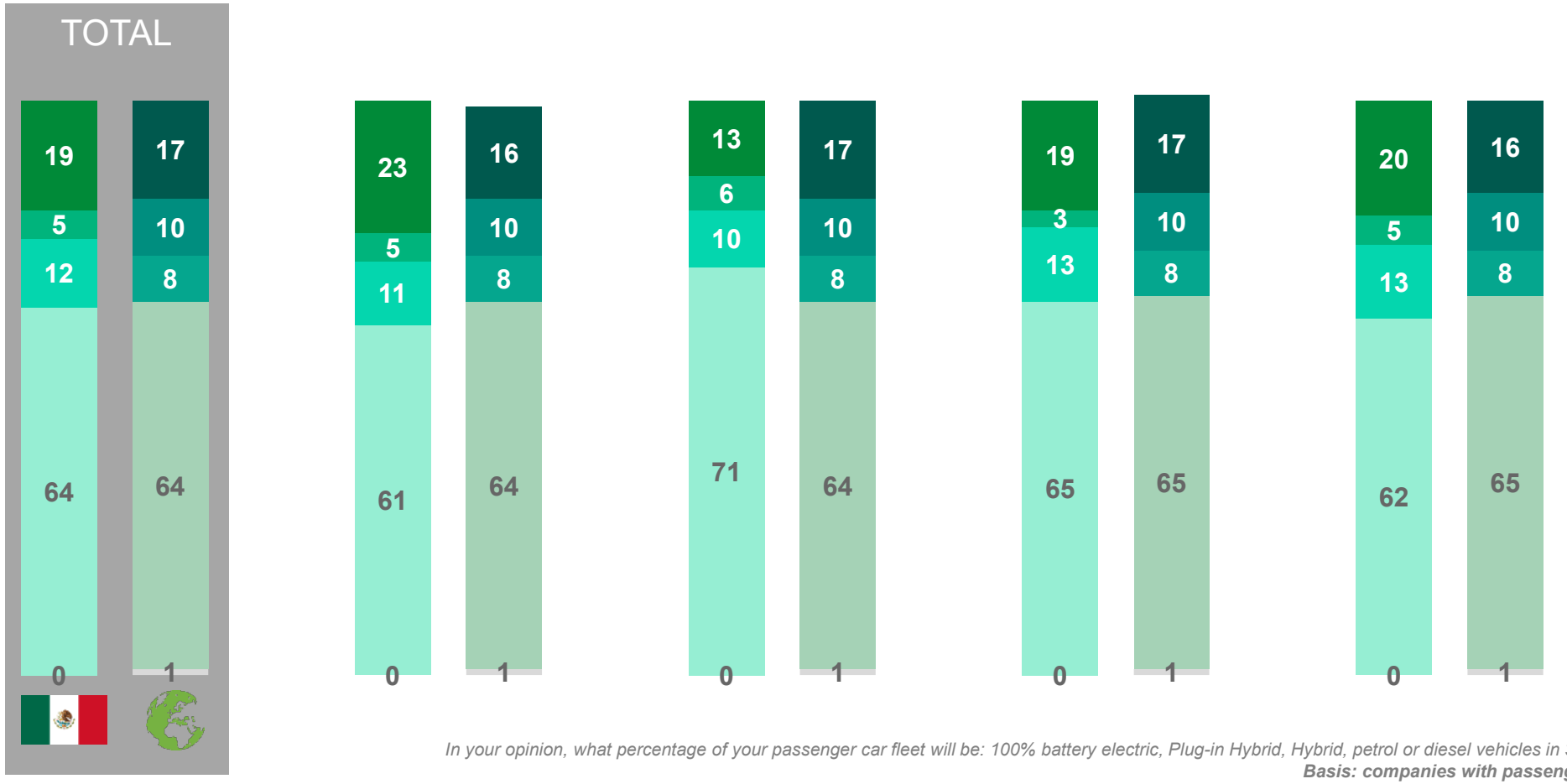
EXPECTED FLEET SHARE PER ENERGY

HOW TO READ THE RESULTS ?

In Mexico in 3 years, 19% of the companies passenger car fleet is expected to be 100% BEV

In %

Passenger cars



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

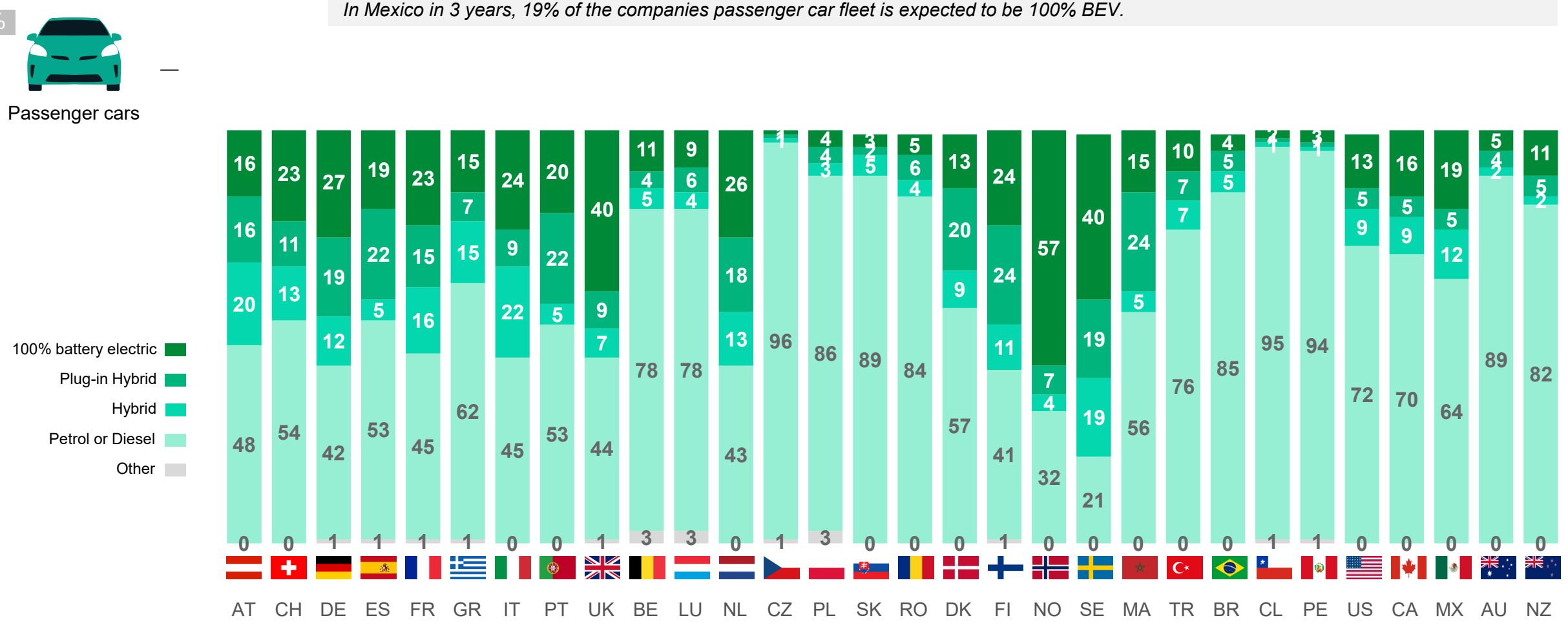
EXPECTED FLEET SHARE PER ENERGY

HOW TO READ THE RESULTS ?

In Mexico in 3 years, 19% of the companies passenger car fleet is expected to be 100% BEV.

In %

Passenger cars



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

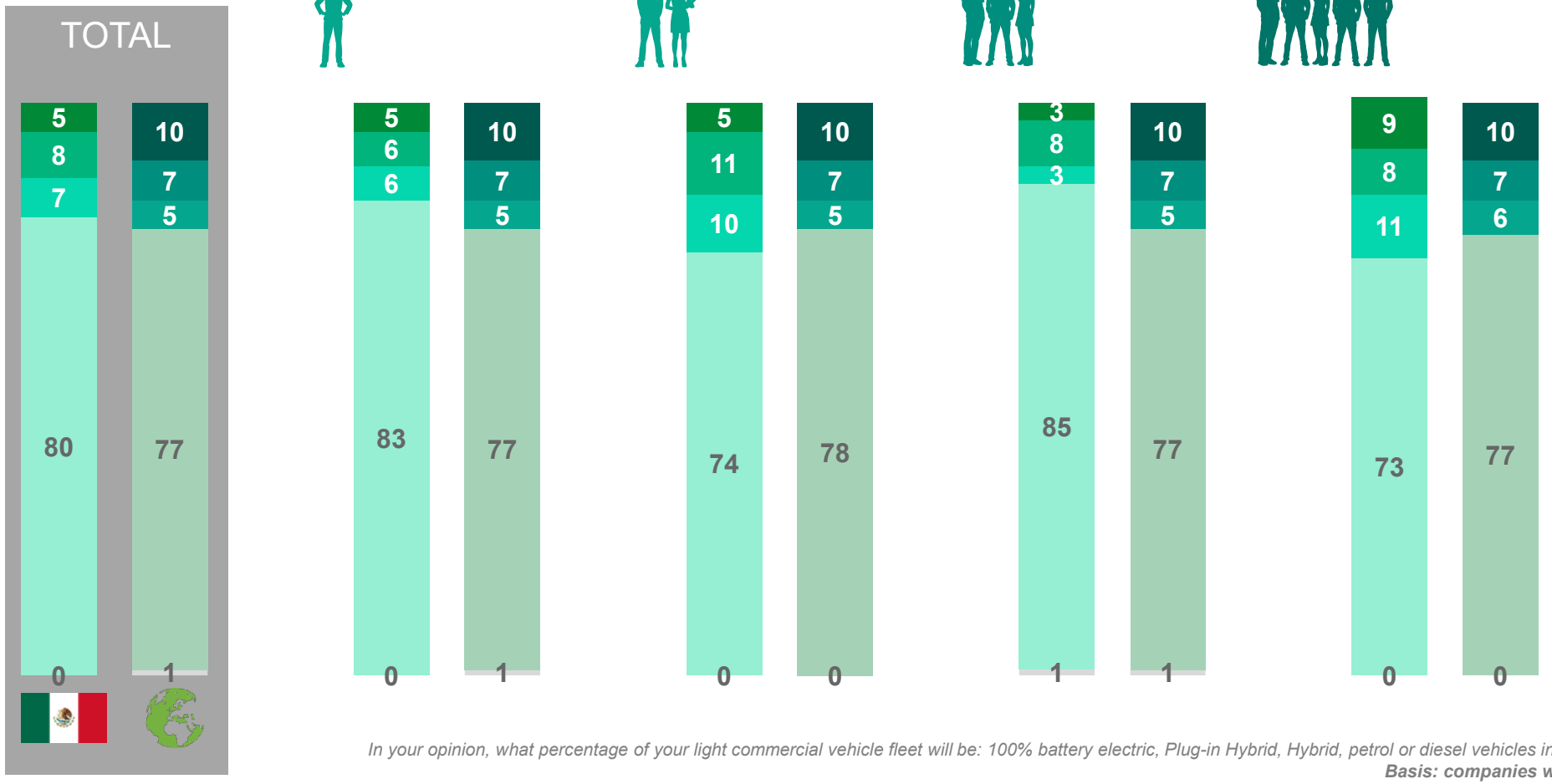
EXPECTED FLEET SHARE PER ENERGY

HOW TO READ THE RESULTS ?

In Mexico in 3 years, 5% of the light commercial vehicle fleet is expected to be 100% BEV.

In %

LCVs



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

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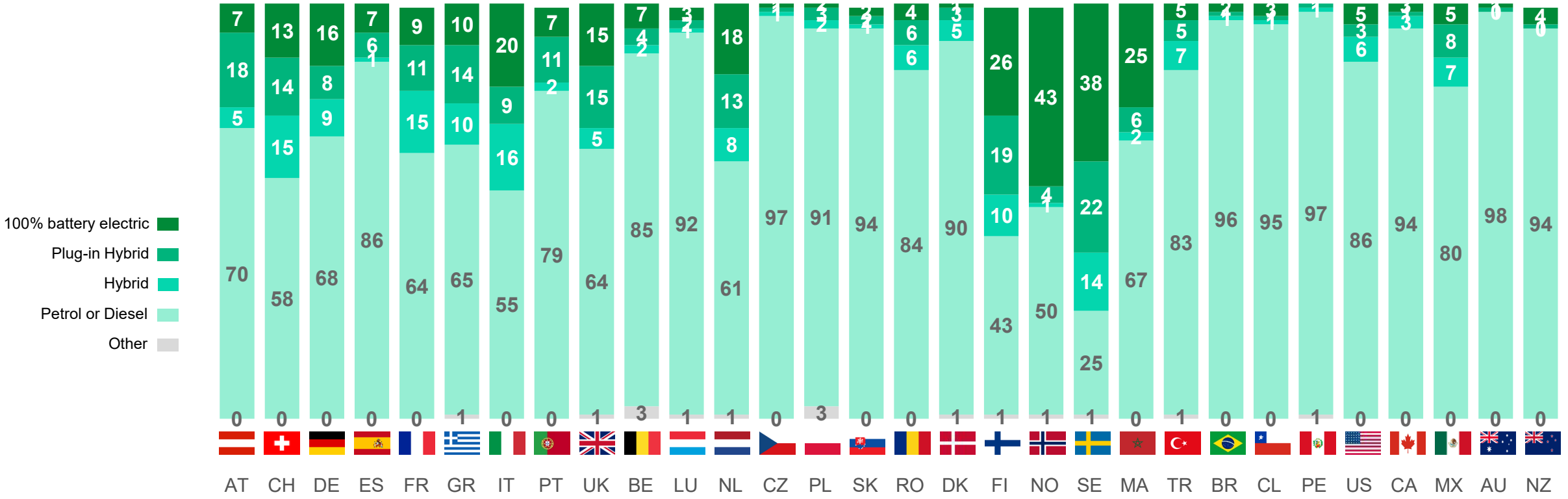
EXPECTED FLEET SHARE PER ENERGY

In %

LCVs

HOW TO READ THE RESULTS ?

In Mexico in 3 years, 5% of the light commercial vehicle fleet is expected to be 100% BEV.



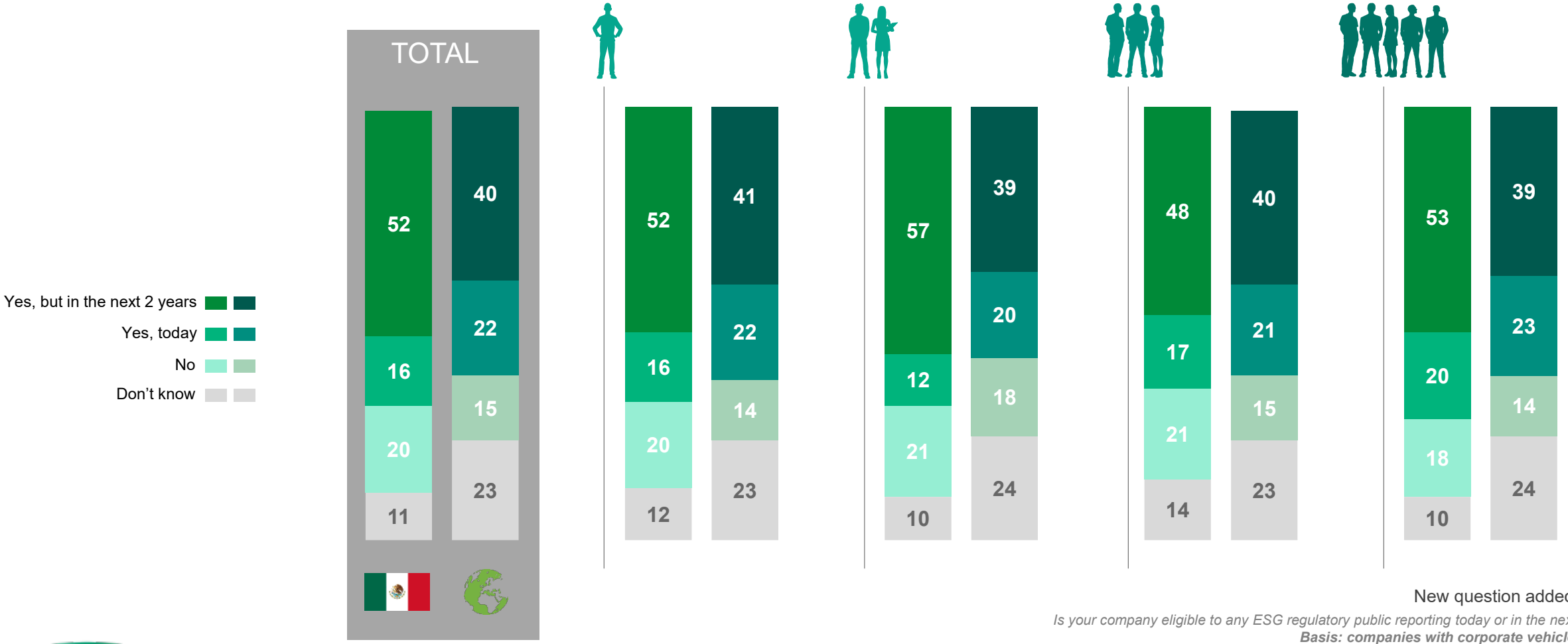
In your opinion, what percentage of your light commercial vehicle fleet will be: 100% battery electric, Plug-in Hybrid, Hybrid, petrol or diesel vehicles in 3 years?
Basis: companies with LCVs

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ELIGIBILITY TO ESG REGULATORY PUBLIC REPORTING

In %

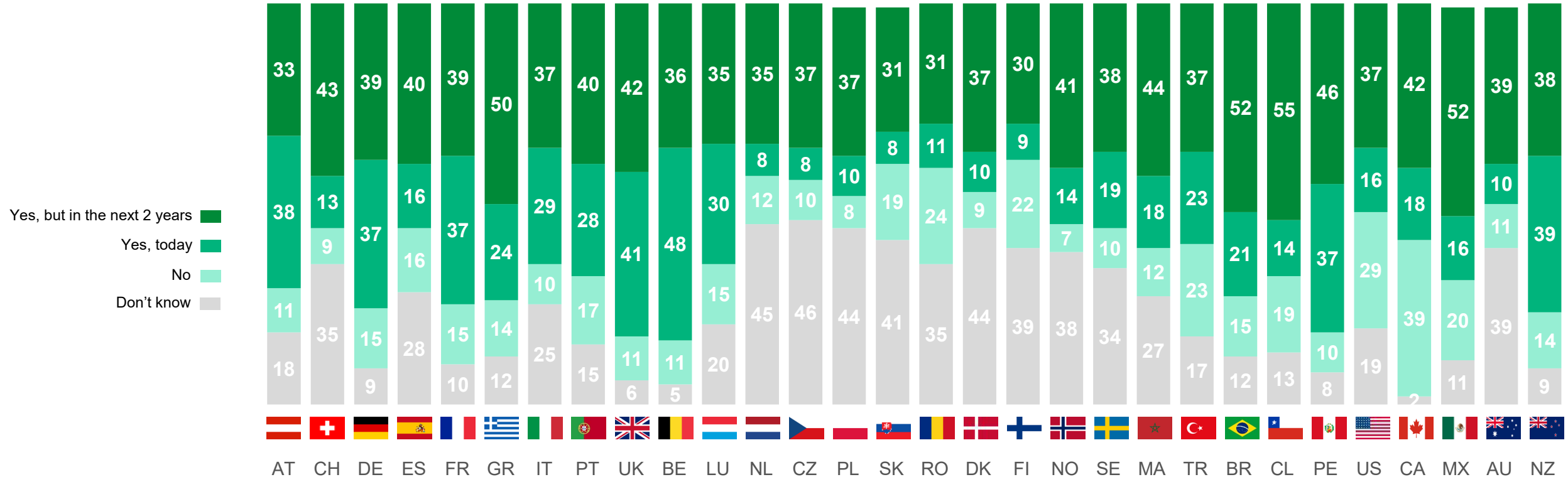


New question added in 2024

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

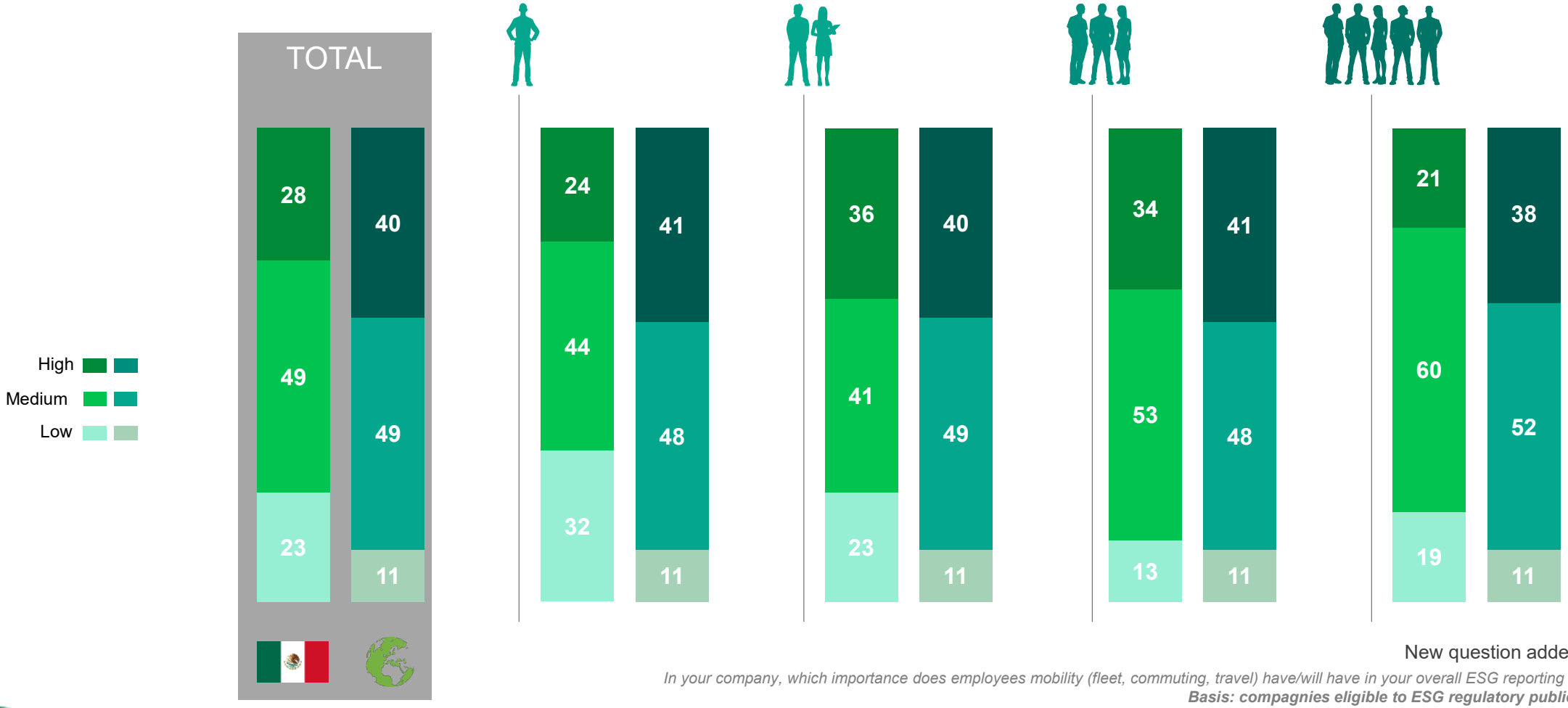
Is your company eligible to any ESG regulatory public reporting today or in the next 2 years?
Basis: companies with corporate vehicles = 100%

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IMPORTANCE OF EMPLOYEES MOBILITY IN ESG REPORTING

In %

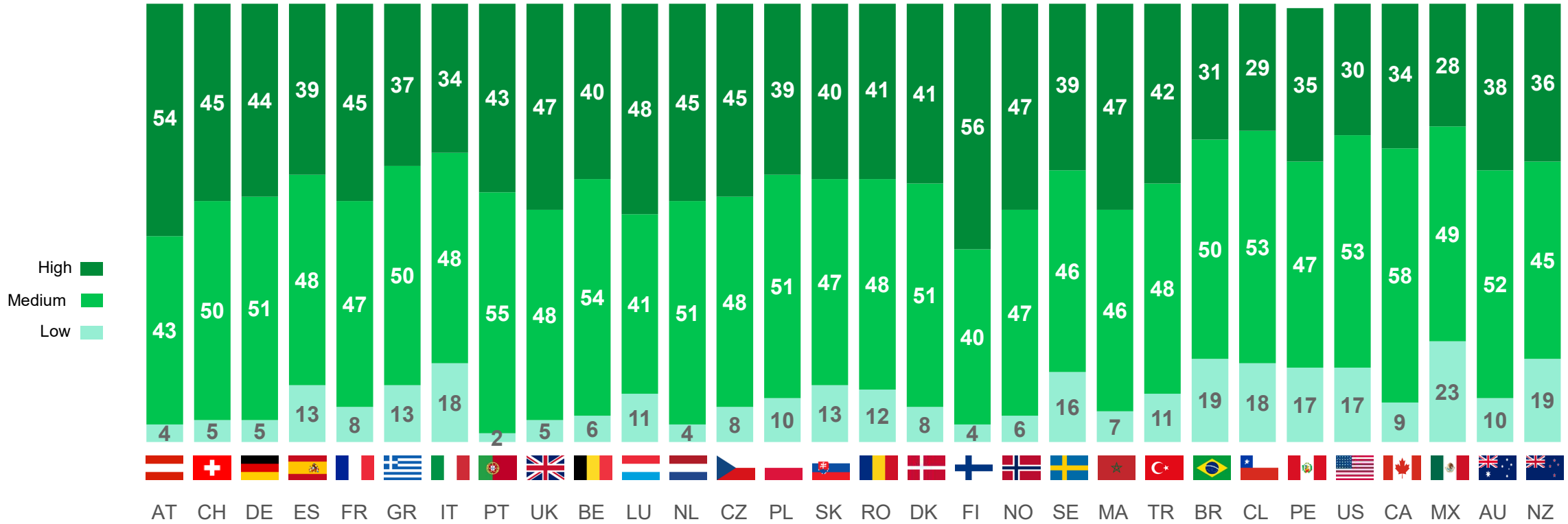


New question added in 2024

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



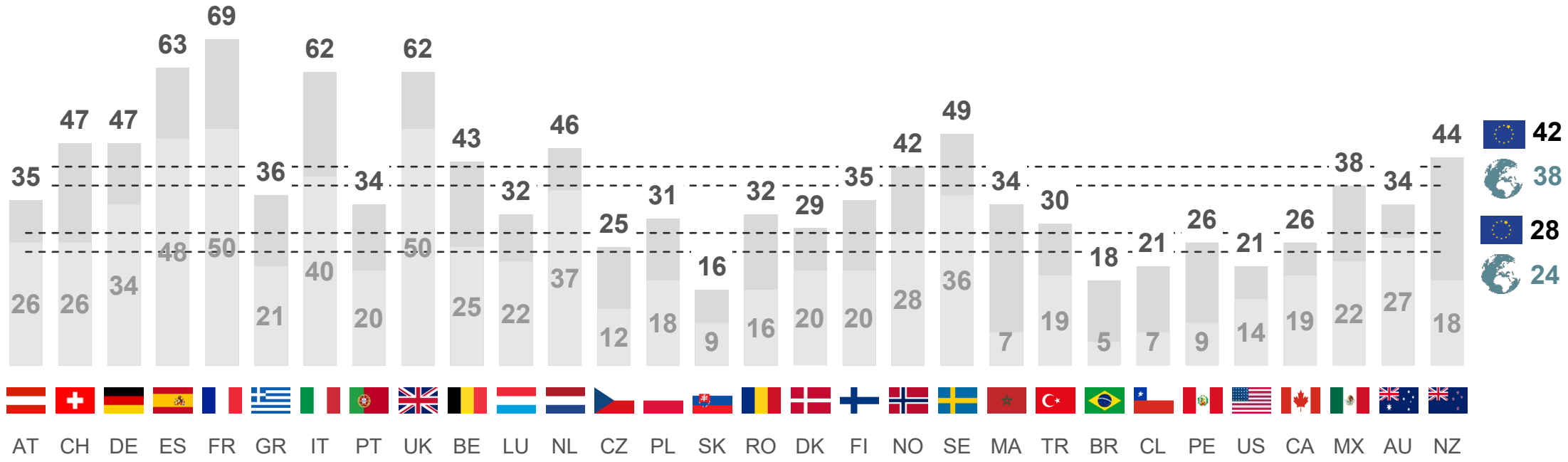
HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

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

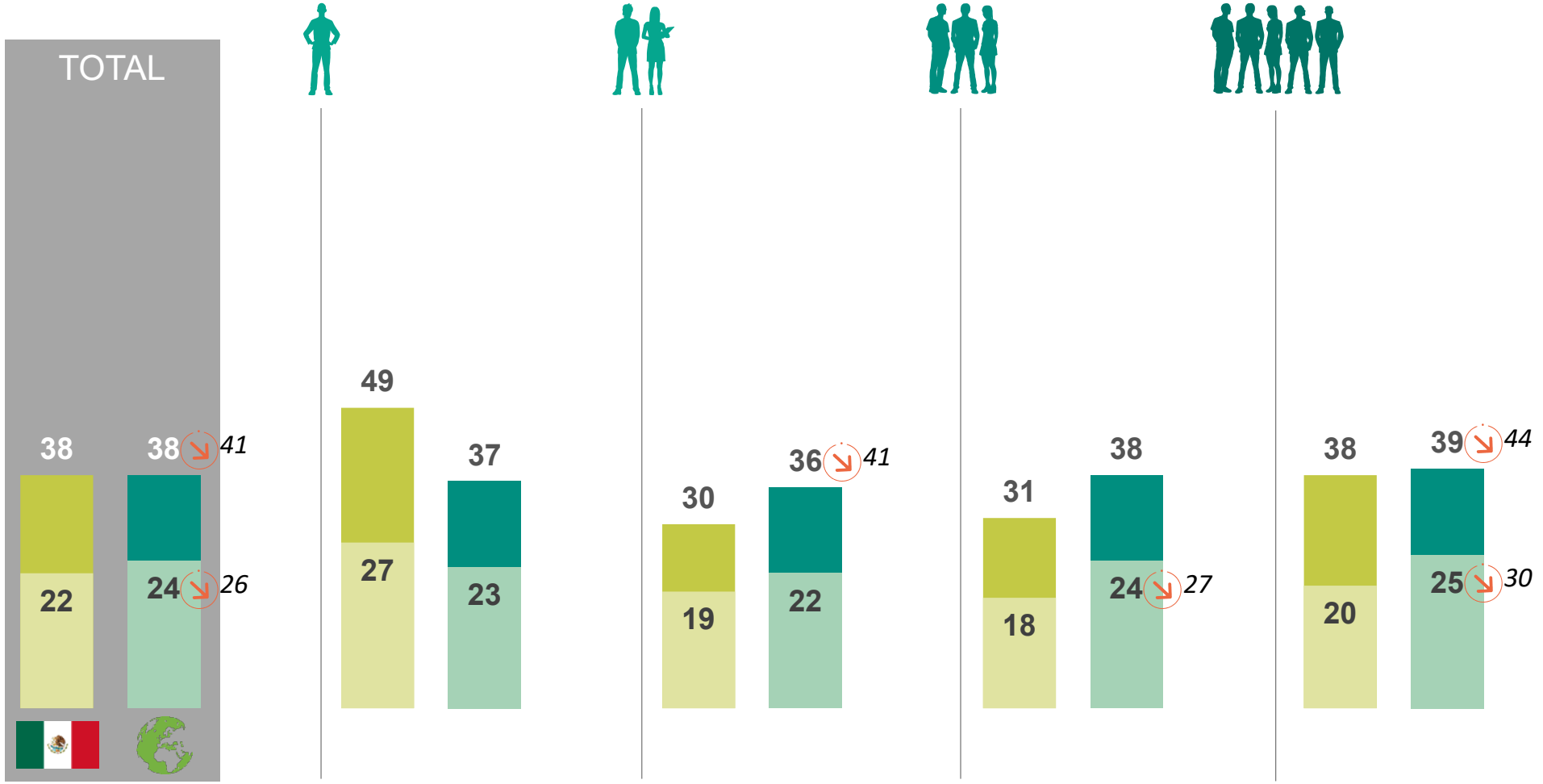
HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

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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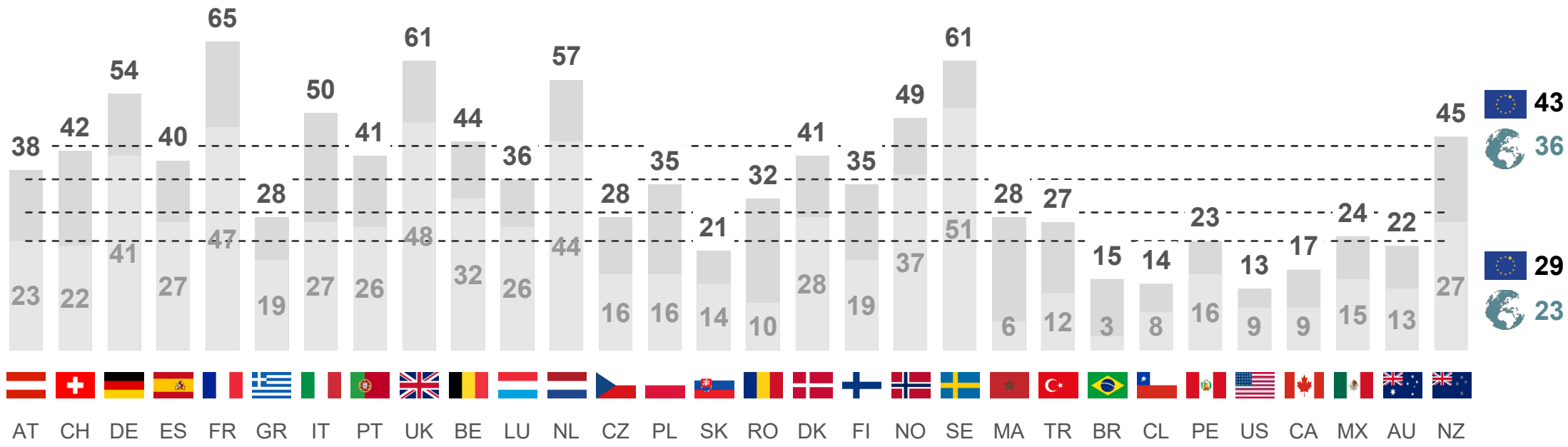
PLUG-IN HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %

Passenger cars

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



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

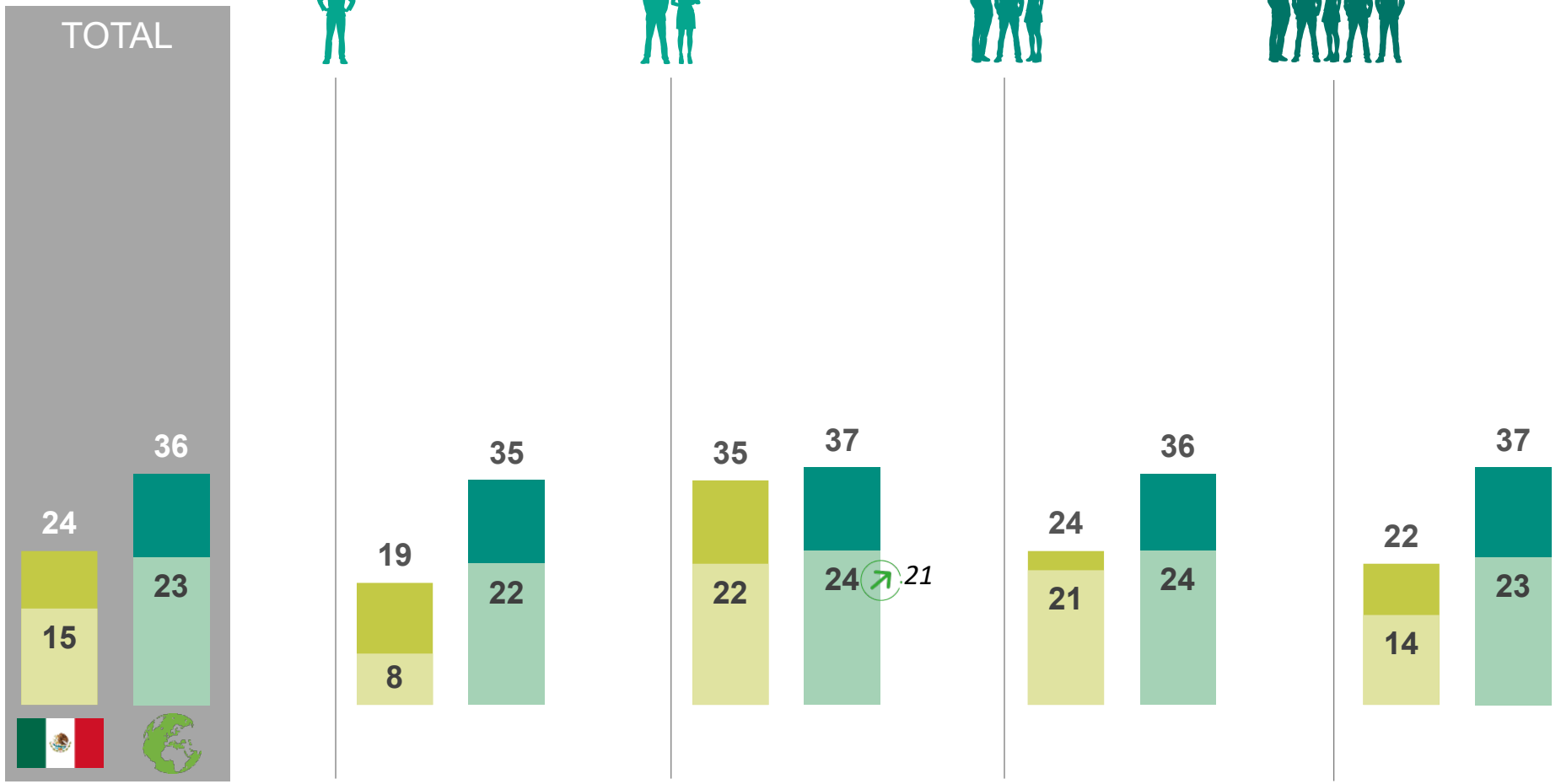
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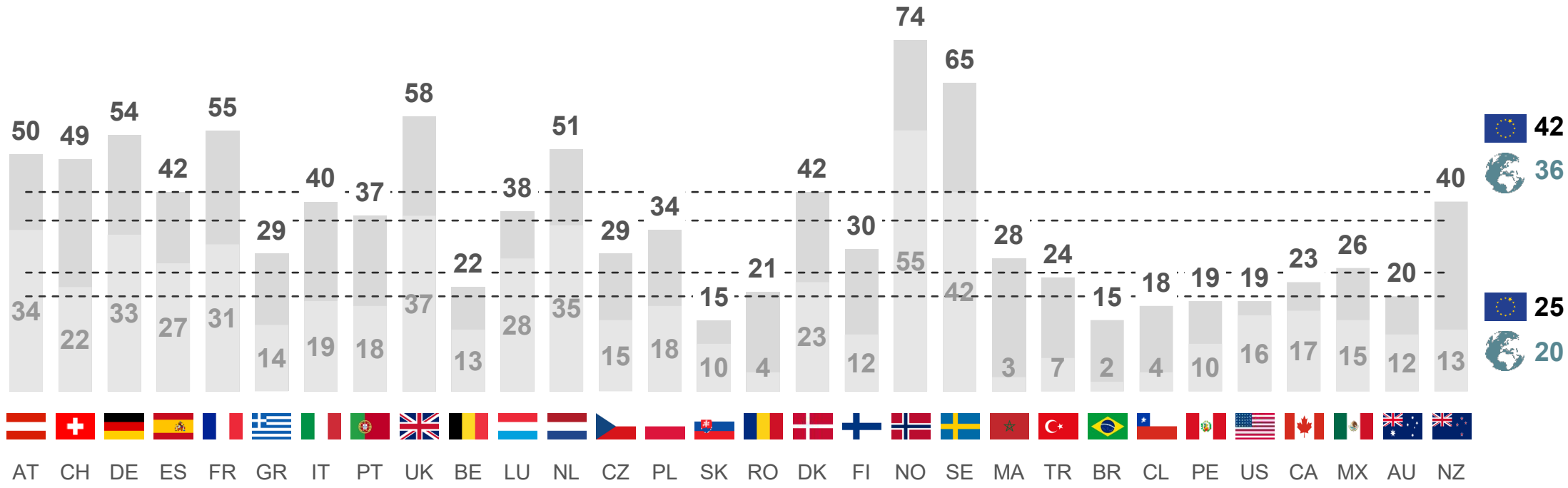
100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %

Passenger cars

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



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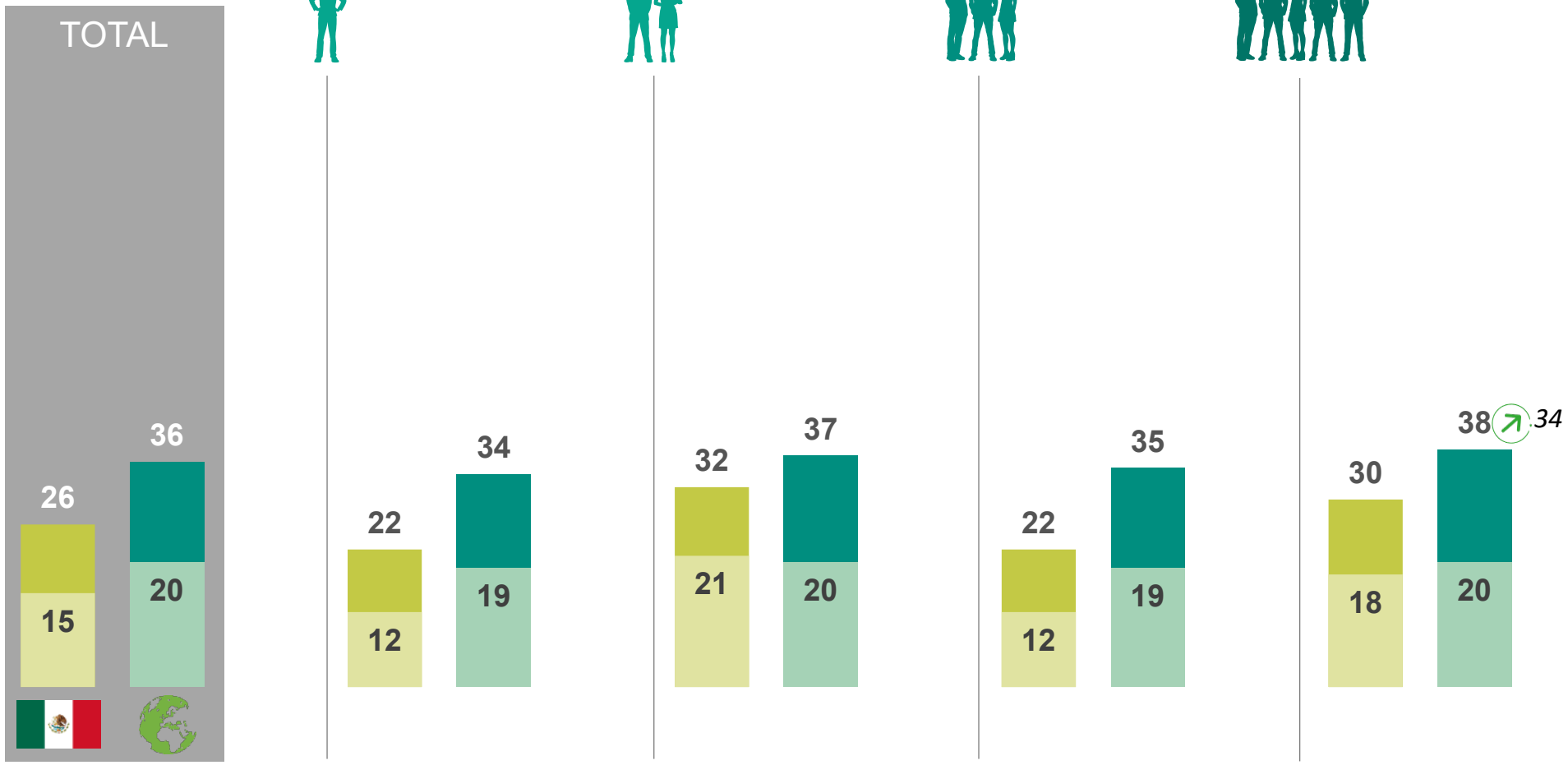
100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %

Passenger cars

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

ALREADY USING



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Amongst the following alternative fuel technologies, which ones are you considering using…?
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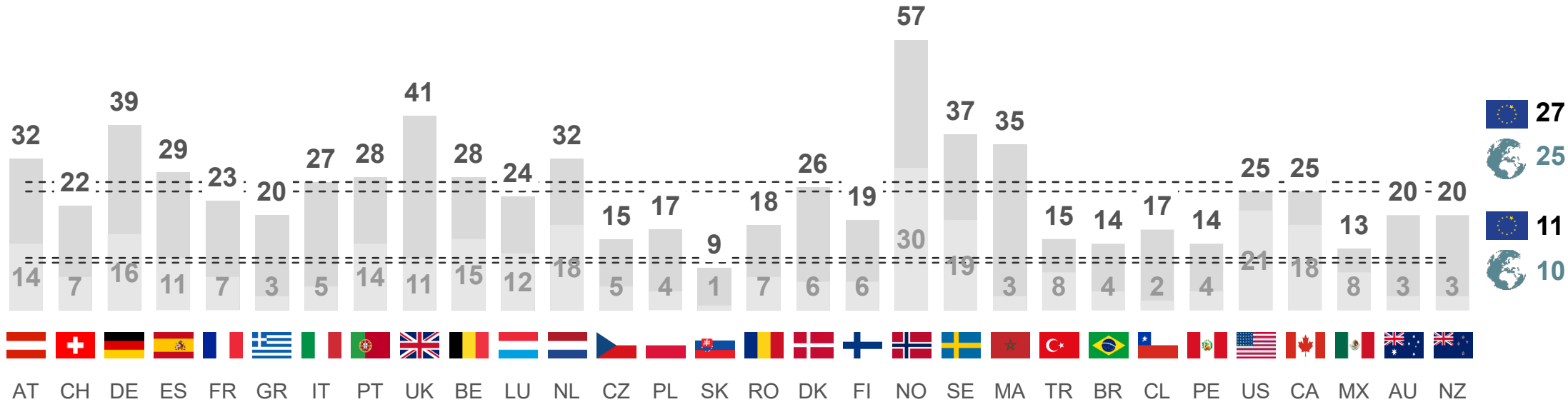
100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %

LCVs

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



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

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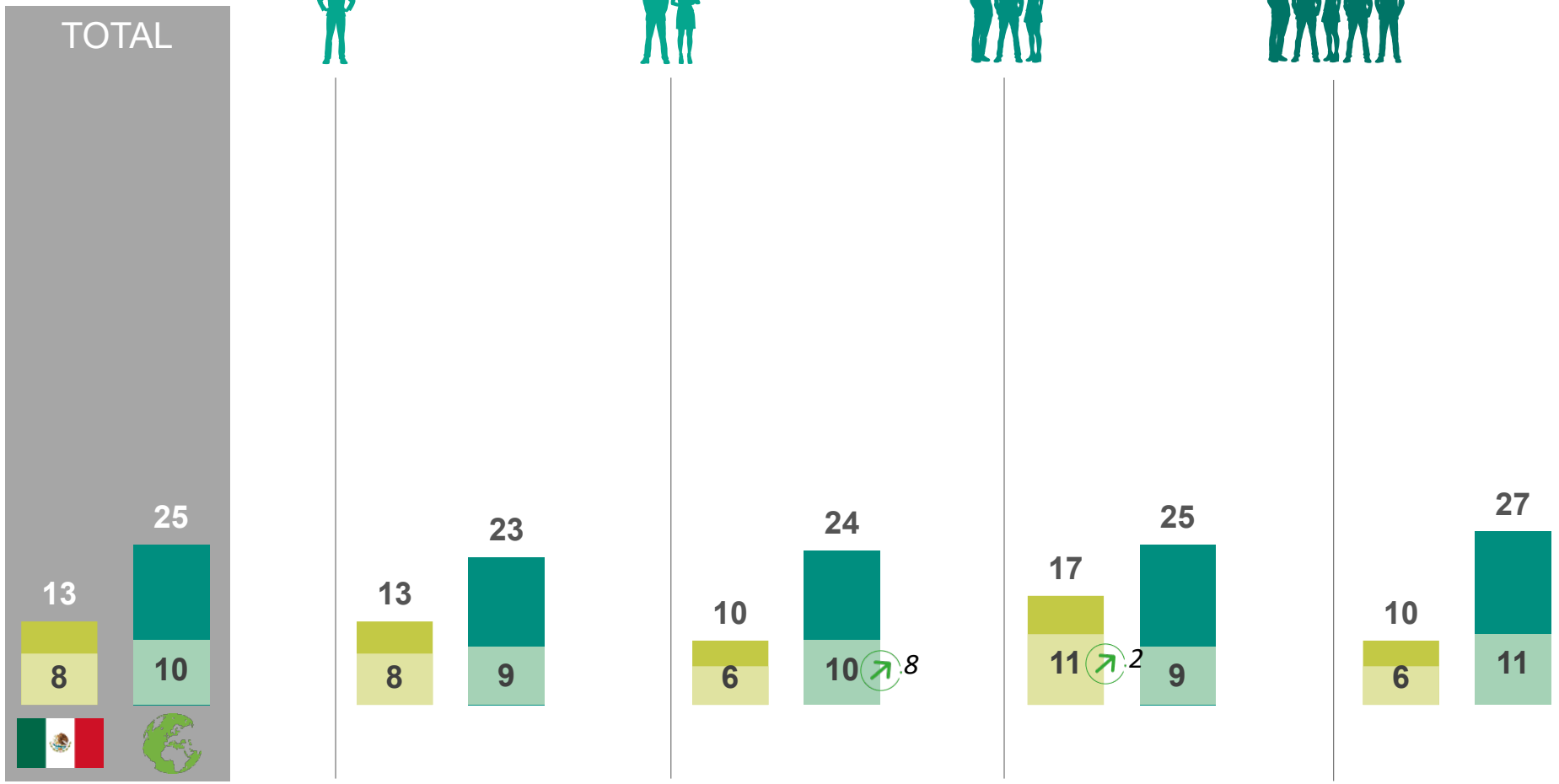
100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %

LCVs

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

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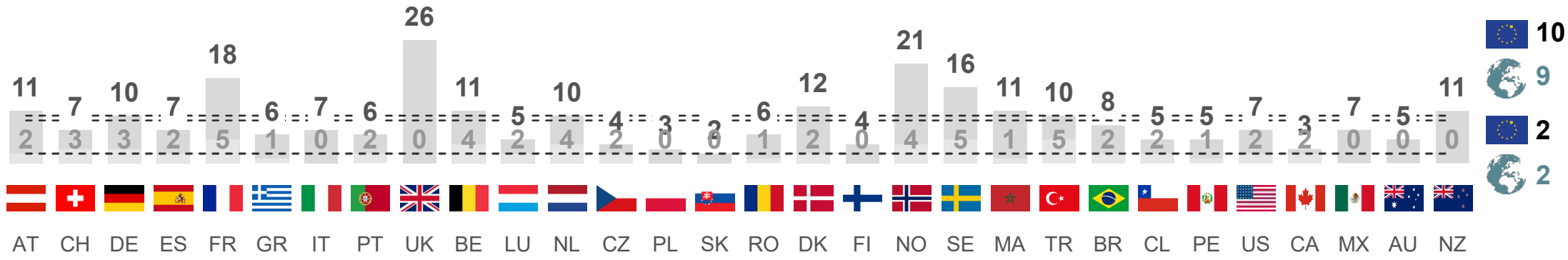
HYDROGEN FUEL CELL ELECTRIC VEHICLE : IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %

LCVs

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



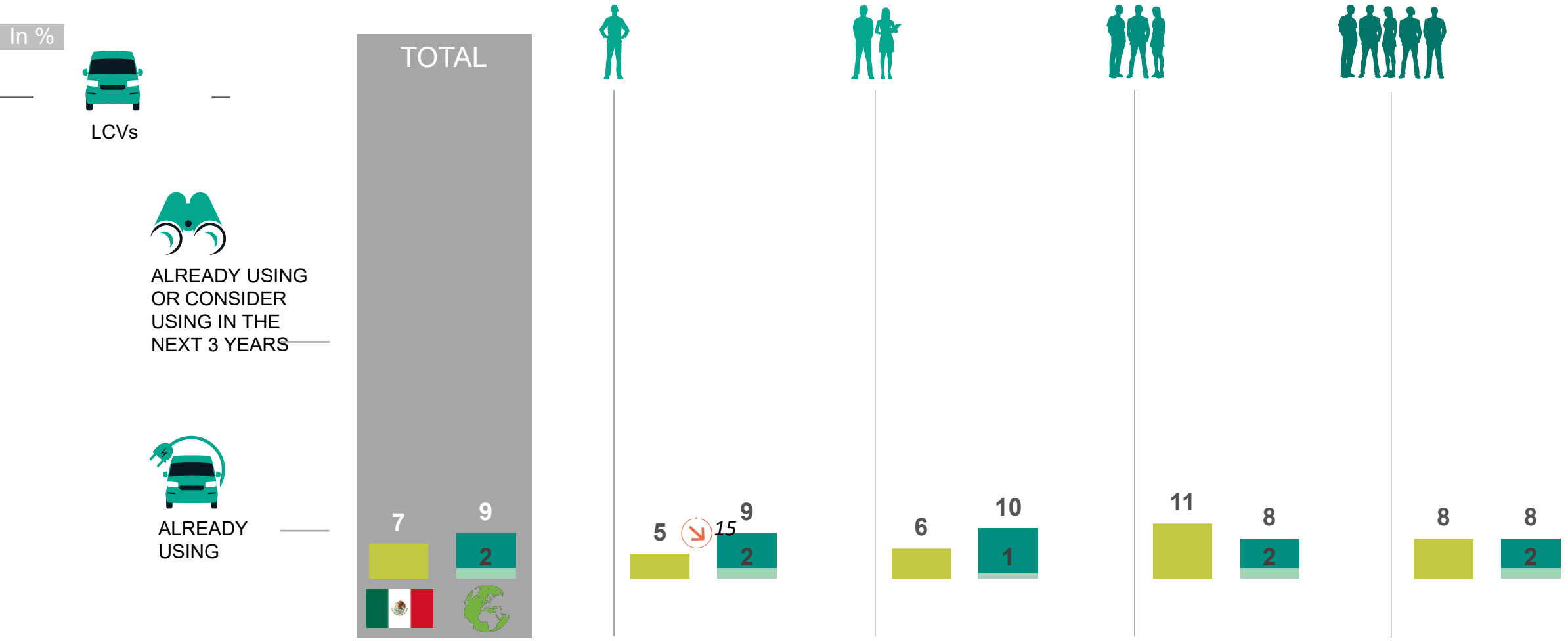
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ELEMENT-ARVAL GLOBAL ALLIANCE

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HYDROGEN FUEL CELL ELECTRIC VEHICLE : IMPLEMENTATION WITHIN COMPANY FLEET POLICY



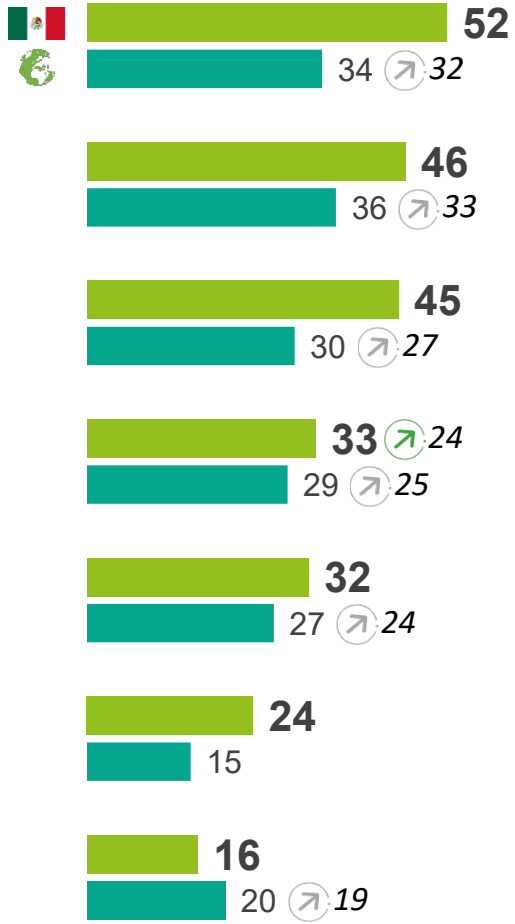
Amongst the following alternative fuel technologies, which ones do you currently use…?
Amongst the following alternative fuel technologies, which ones are you considering using…?
Basis: companies with LCVs

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CONSTRAINTS OF 100% BATTERY ELECTRIC VEHICLE USAGE

In %

Passenger cars + LCVs



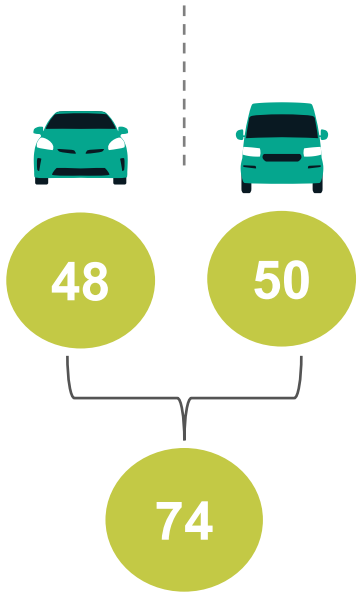
What are the constraints of using 100% Battery Electric vehicles?
Basis: Know 100% BEV technology

CONSTRAINTS OF 100% BATTERY ELECTRIC VEHICLE USAGE

In %

Passenger cars + LCVs

do not consider implementing battery electric vehicles



The purchase price is higher than a regular fuel car	54 / 35
No charging points at your company offices	45 / 31 (29)
Not enough public charging points	42 / 35
The range of models is limited for this type of vehicles	33 / 28
No charging solutions at your employees' home	32 / 29 (25)
Your employee's reluctance to drive electric vehicles	25 / 16
The questions raised on their reliability	12 (20) / 21

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

ACCESS TO CHARGING POINTS

In %

Passenger cars + LCVs



	TOTAL				
Currently no charging points installed at the company premises	62	69	57	65	52
	47 ↗ 42	47 ↗ 42	47 ↗ 43	47 ↗ 43	46 ↗ 40
Drivers have to pay for home installation of charging points	28	28	39	25	20
	26	25	25	26	27
Charging points are planned to be installed at the company premises in the next 12 months	25	15	33	21	40
	30	30	29	31	29
Company subsidises cost of home installations of charging points for drivers	9	3 ↘ 16	6	14	16
	20 ↗ 16	19	21 ↗ 14	19 ↗ 16	21
Charging points installed at the company premises and drivers charged for charging	6	5	0	13	4
	7	7	7	6	6
Charging points installed at the company premises and free charging for drivers	6 ↘ 14	8	11	0	4
	13 ↘ 15	12 ↘ 15	14	12	13

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

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

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

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6

WHAT ARE THE PERSPECTIVES IN TERMS OF MOBILITY SOLUTIONS?





MOBILITY SOLUTIONS



TOP 3 USED SOLUTIONS

#1	Car or cash allowance	29%	17%
#2	Public transport	29%	21%
#3	Mobility Budget: a predefined budget provided by the company that allows employees to choose their mode of transport.	24%	15%





TOP 3 POTENTIAL NEXT 3 YEARS



#1	Mobility Budget: a predefined budget provided by the company that allows employees to choose their mode of transport.	44%	28%
#2	Car or cash allowance	43%	28%
#3	Ride sharing: where several employees travel in the same car to the same destination	37%	29%



GOOD LEVEL OF MOBILITY SOLUTIONS IMPLEMENTATION

1. To date, **8 out of 10 Mexican companies have already adopted at least one mobility solution**, somehow above the 75% global average.

Car or cash allowance (29%), public transport (29% too) and mobility budget (24%) are the most widespread mobility solutions. Mobility budget and car/cash allowance are the ones considered the most, driven up by the >100 employees companies.

2. The **development of mobility solutions is mostly fueled by HR related needs** (talent recruitment, employees retainment), brand's image and compliance with CSR policies. They remain mostly considered as add-ons to corporate vehicles.

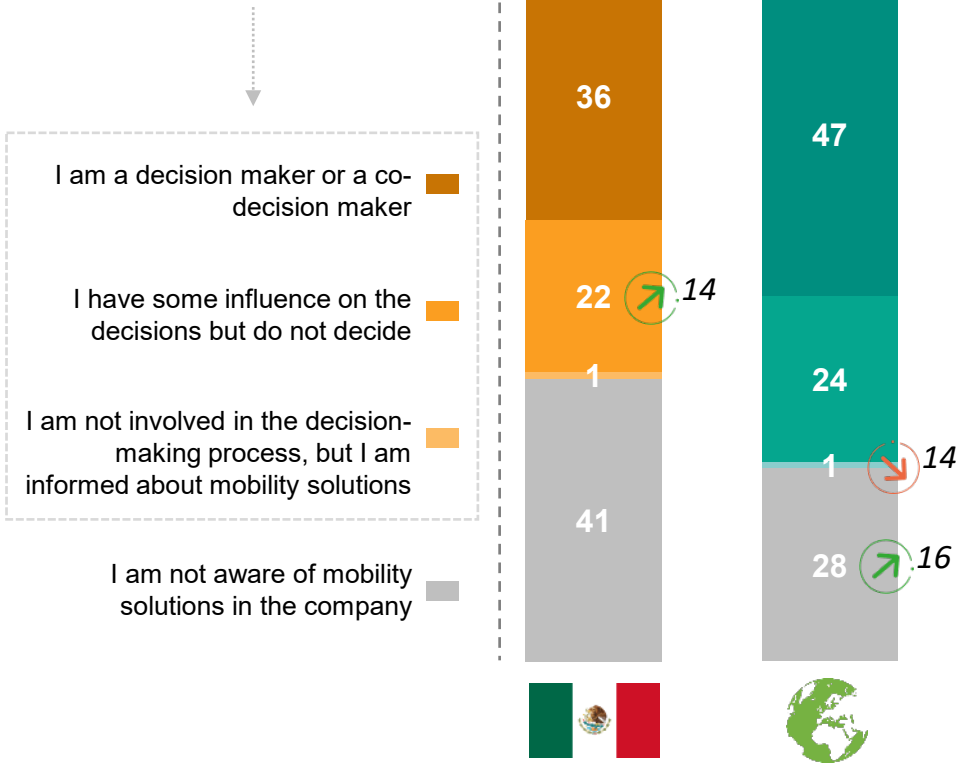
3. Almost **half of Mexican companies have implemented a mobility plan**.

Private cars (44%) and public transport (40%) are the main means to commute for the employees by far.

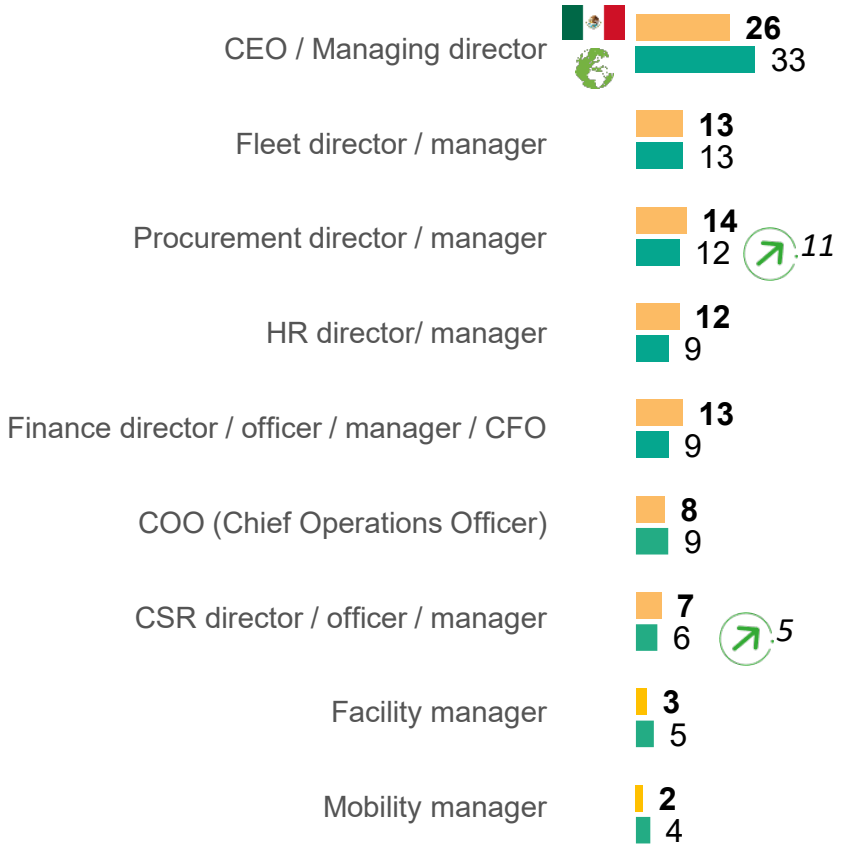
MOBILITY SOLUTION DECISION MAKERS

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

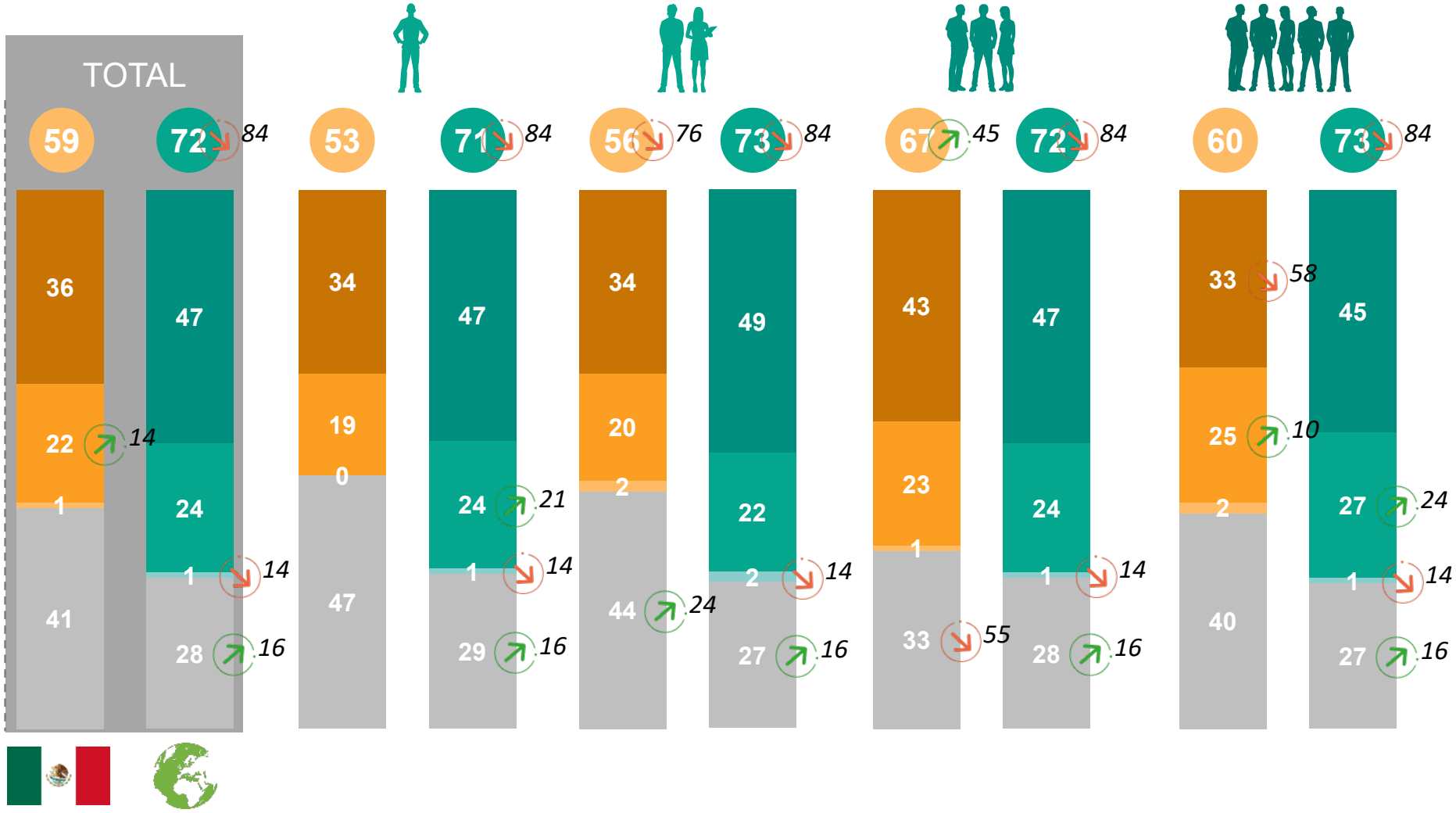


To what extent are you informed about mobility solutions using other modes of transportation than company cars (such as car sharing , bike sharing etc….)
What is the position of the person who decides on mobility solutions in your company??
Basis: companies with corporate vehicles = 100%

RESPONDENTS INVOLVEMENT IN MOBILITY SOLUTION DECISIONS

In %

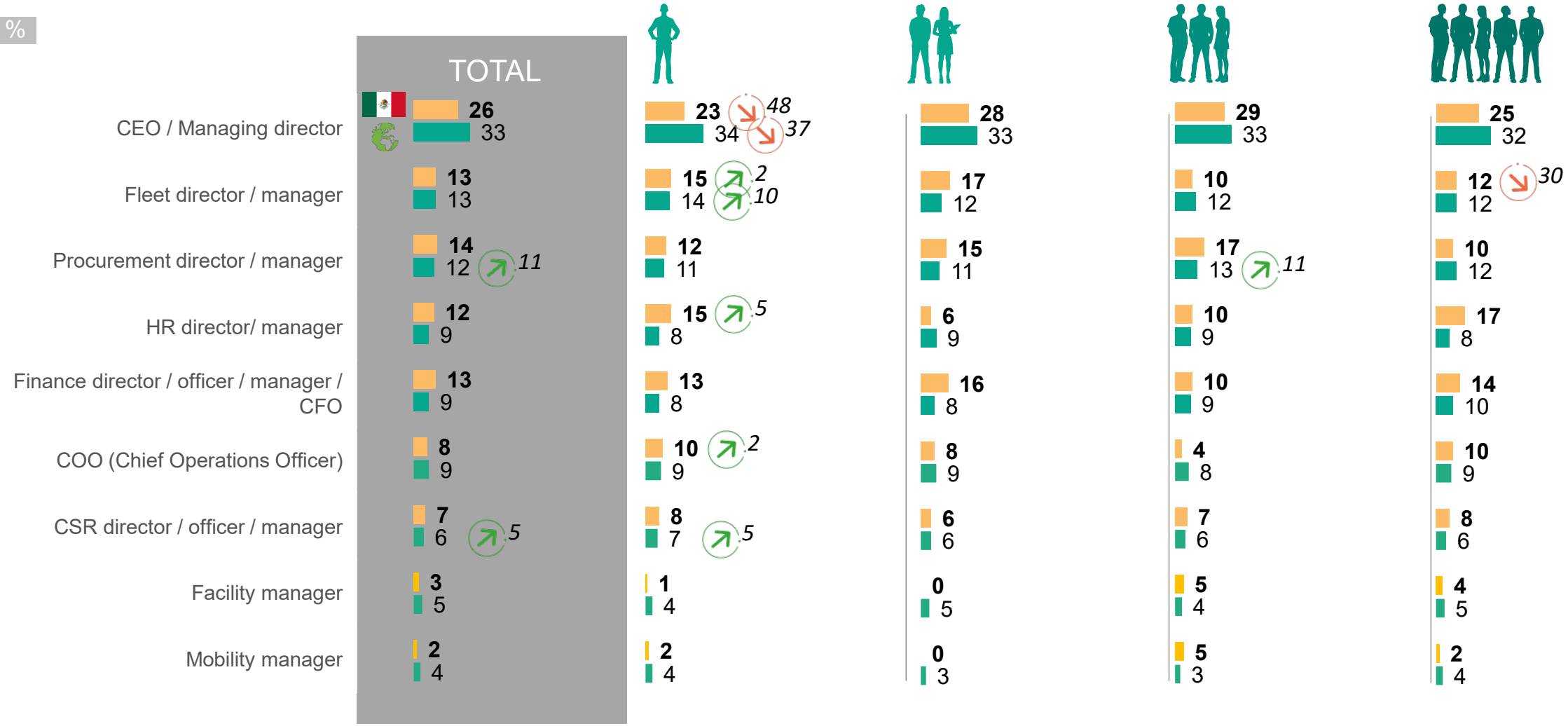
NET ARE AWARE OF MOBILITY SOLUTIONS
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To what extent are you informed about mobility solutions using other modes of transportation than company cars (such as car sharing , bike sharing etc….)
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POSITION OF THE PERSON WHO DECIDES ON MOBILITY SOLUTIONS

In %



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

MOBILITY SOLUTIONS LIST AND DEFINITIONS



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



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



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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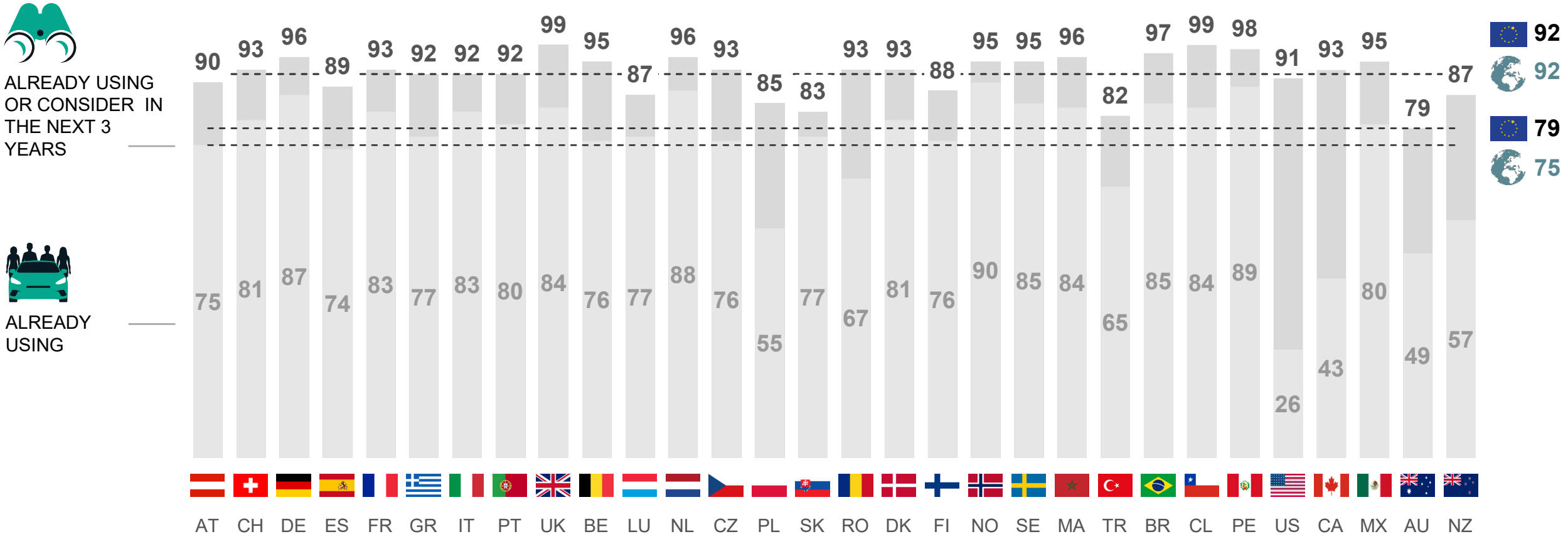
MOBILITY SOLUTIONS IMPLEMENTATION

At least one already implemented

List of the alternative mobility solutions:

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

In %



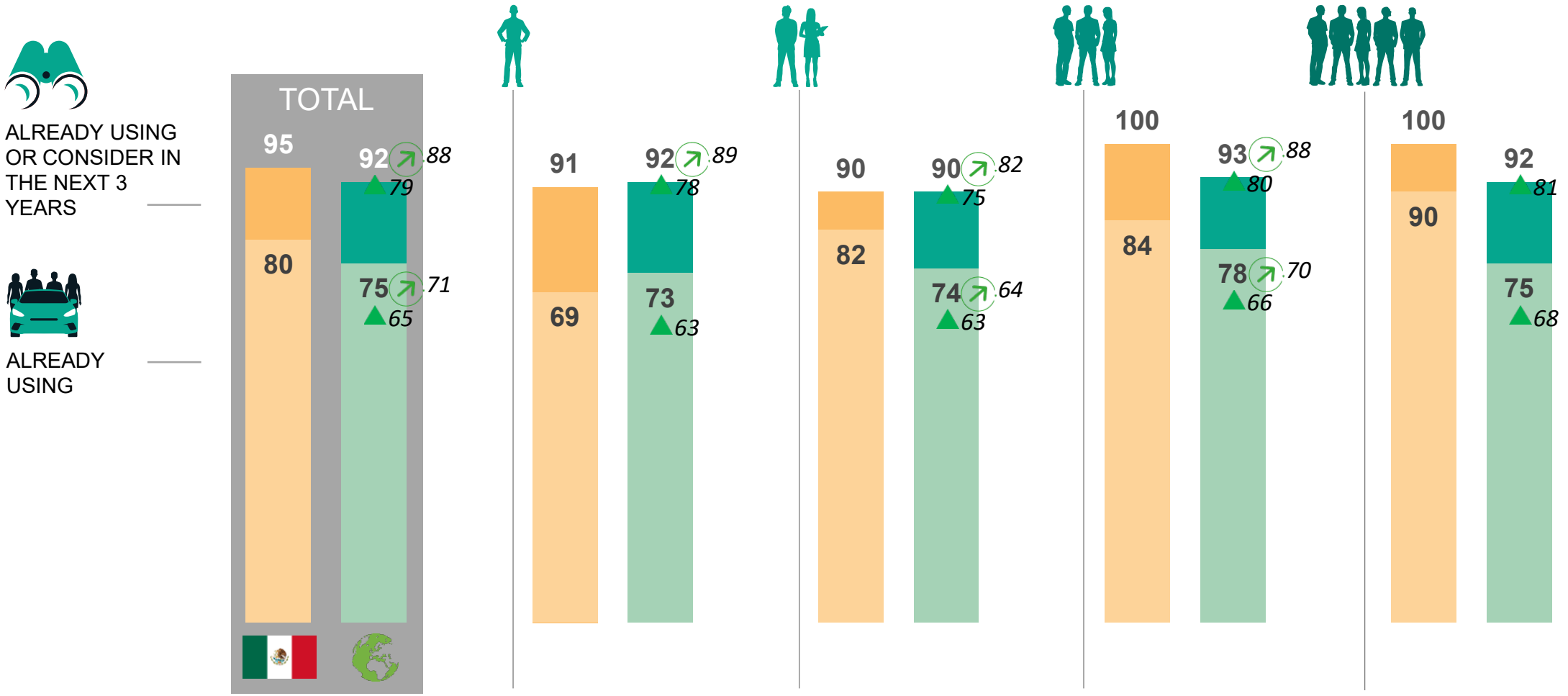
Which of the following have you implemented, or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions

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MOBILITY SOLUTIONS IMPLEMENTATION

At least one already implemented

In %



XX Significantly higher than 2023 year

XX Significantly higher than 2022 year

XX = score 2023 or 2022

XX Significantly lower than 2023 year

XX Significantly lower than 2022 year

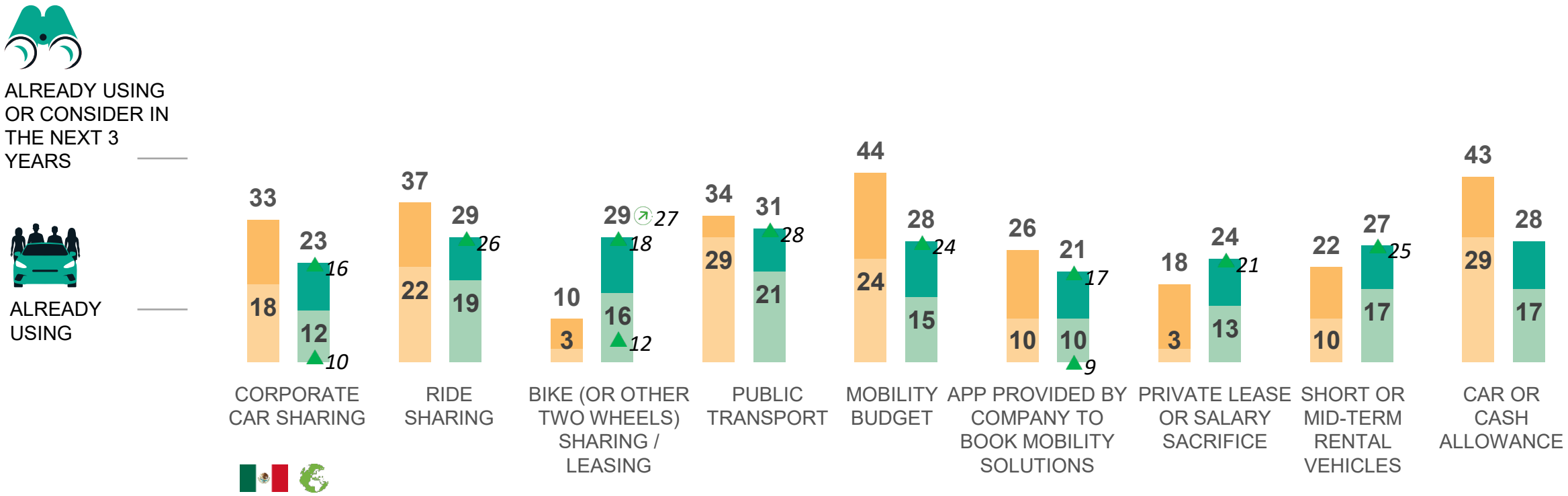
XX = score 2023 or 2022

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OVERVIEW OF MOBILITY SOLUTIONS IMPLEMENTATION

80% Of companies have already implemented at least one of these solutions

In %



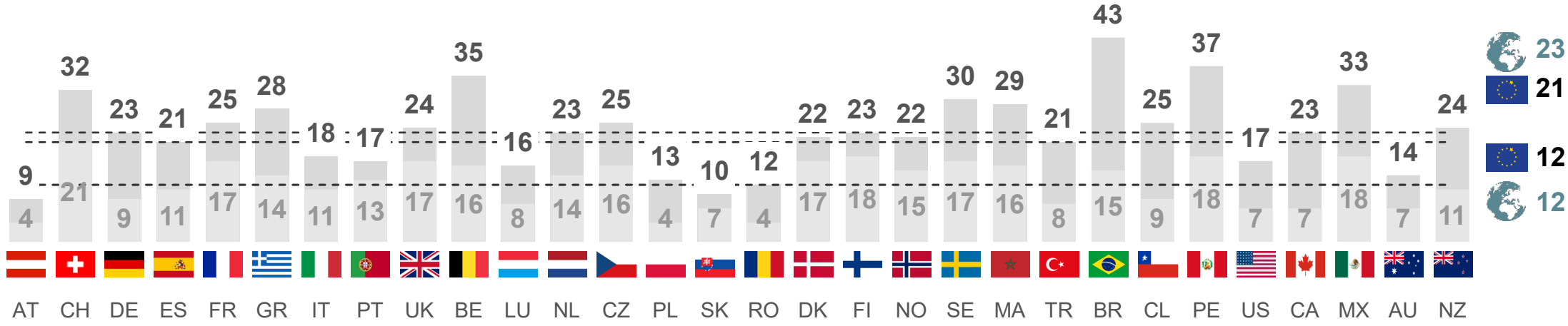
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CORPORATE CAR SHARING IMPLEMENTATION

In %

ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS

ALREADY USING



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Question asked to respondents that are aware of mobility solutions

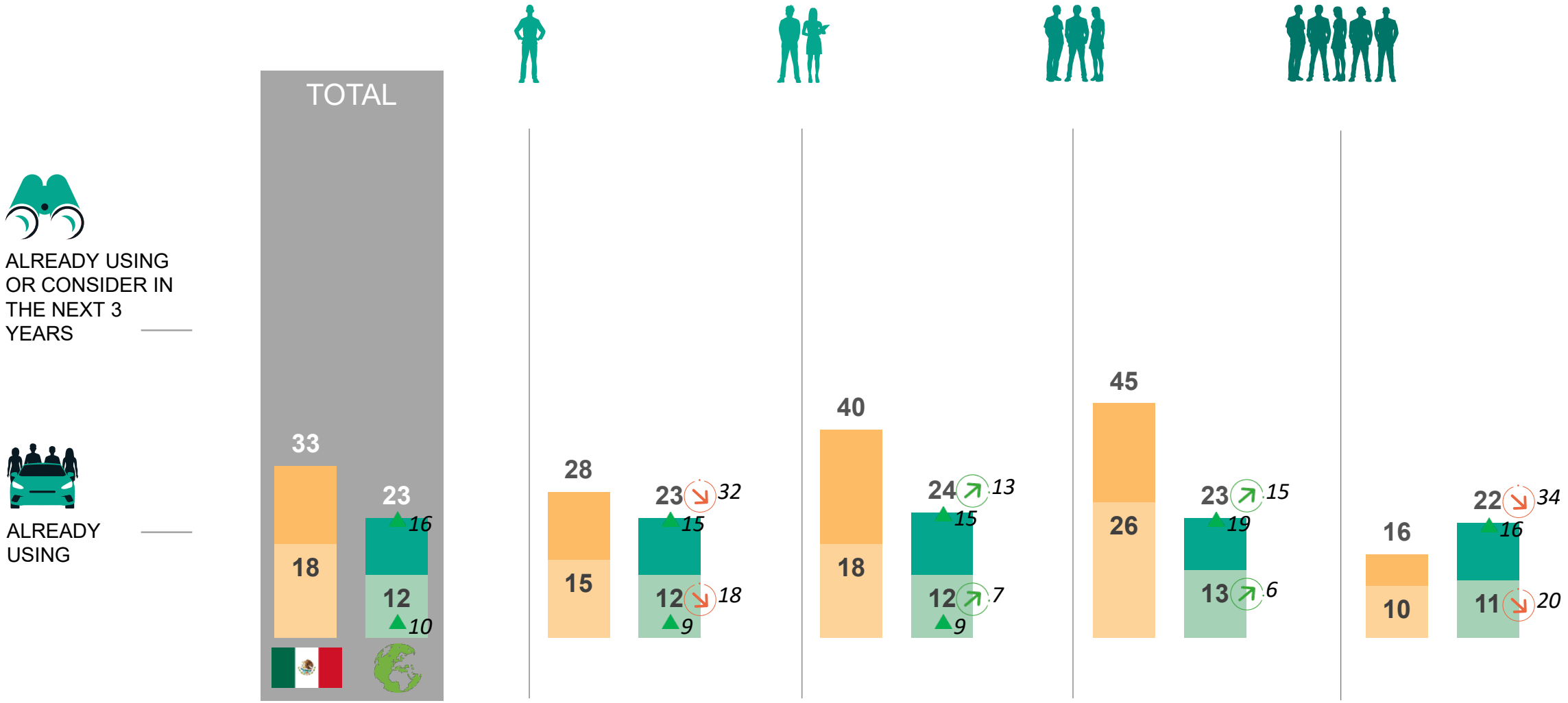
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CORPORATE CAR SHARING IMPLEMENTATION

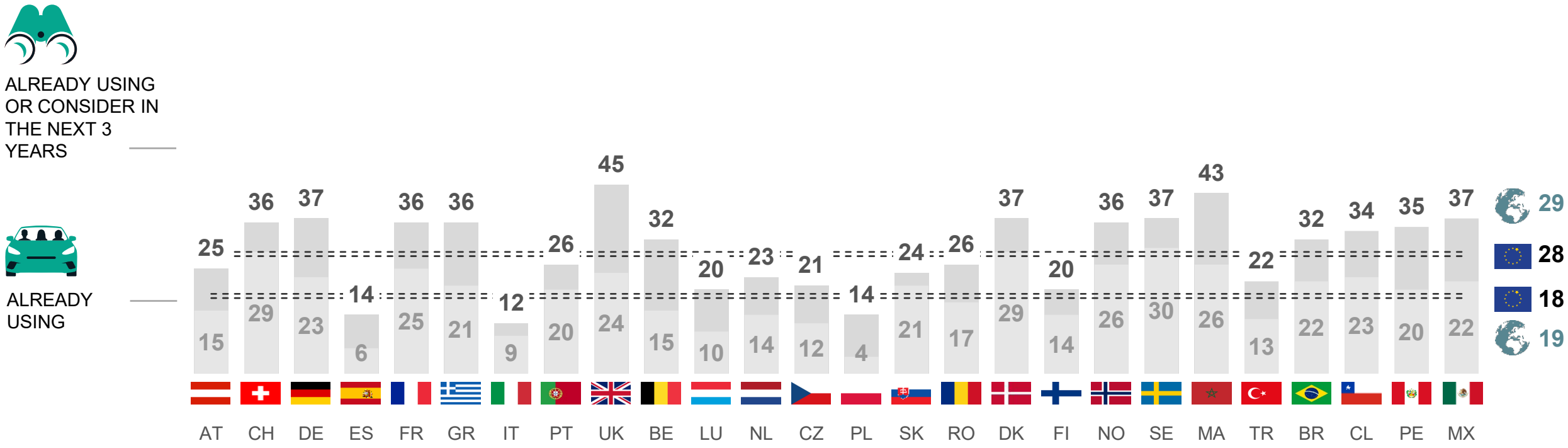
In %



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

RIDE SHARING IMPLEMENTATION

In %

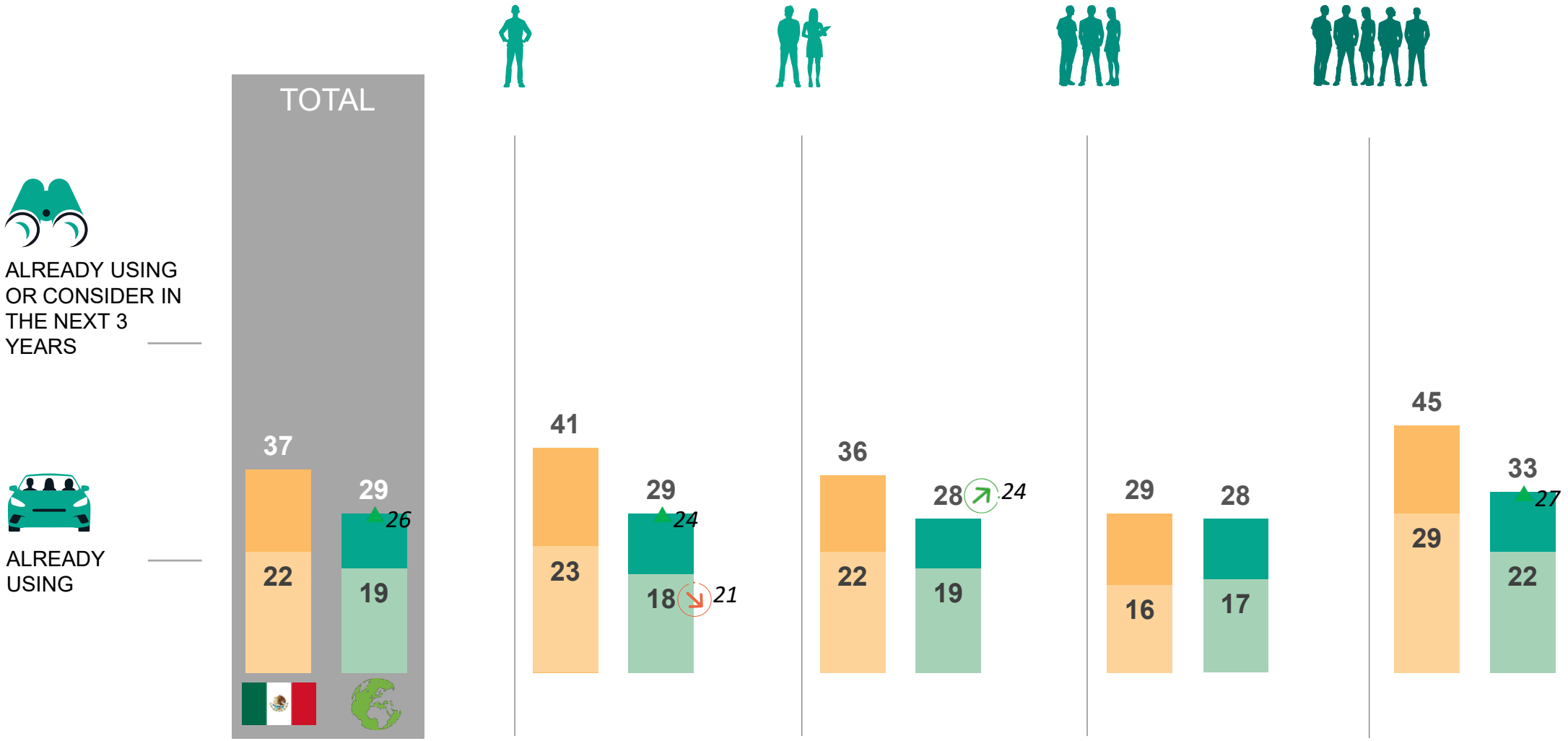


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RIDE SHARING IMPLEMENTATION

In %



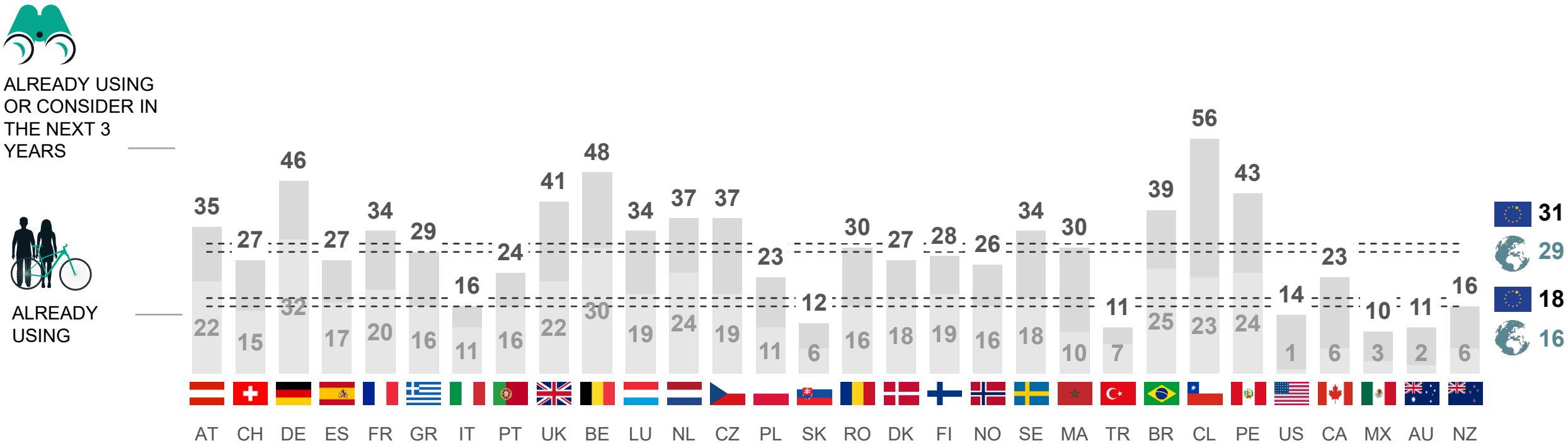
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Question asked to respondents that are aware of mobility solutions

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BIKE (OR OTHER TWO WHEELS) SHARING / LEASING IMPLEMENTATION

In %

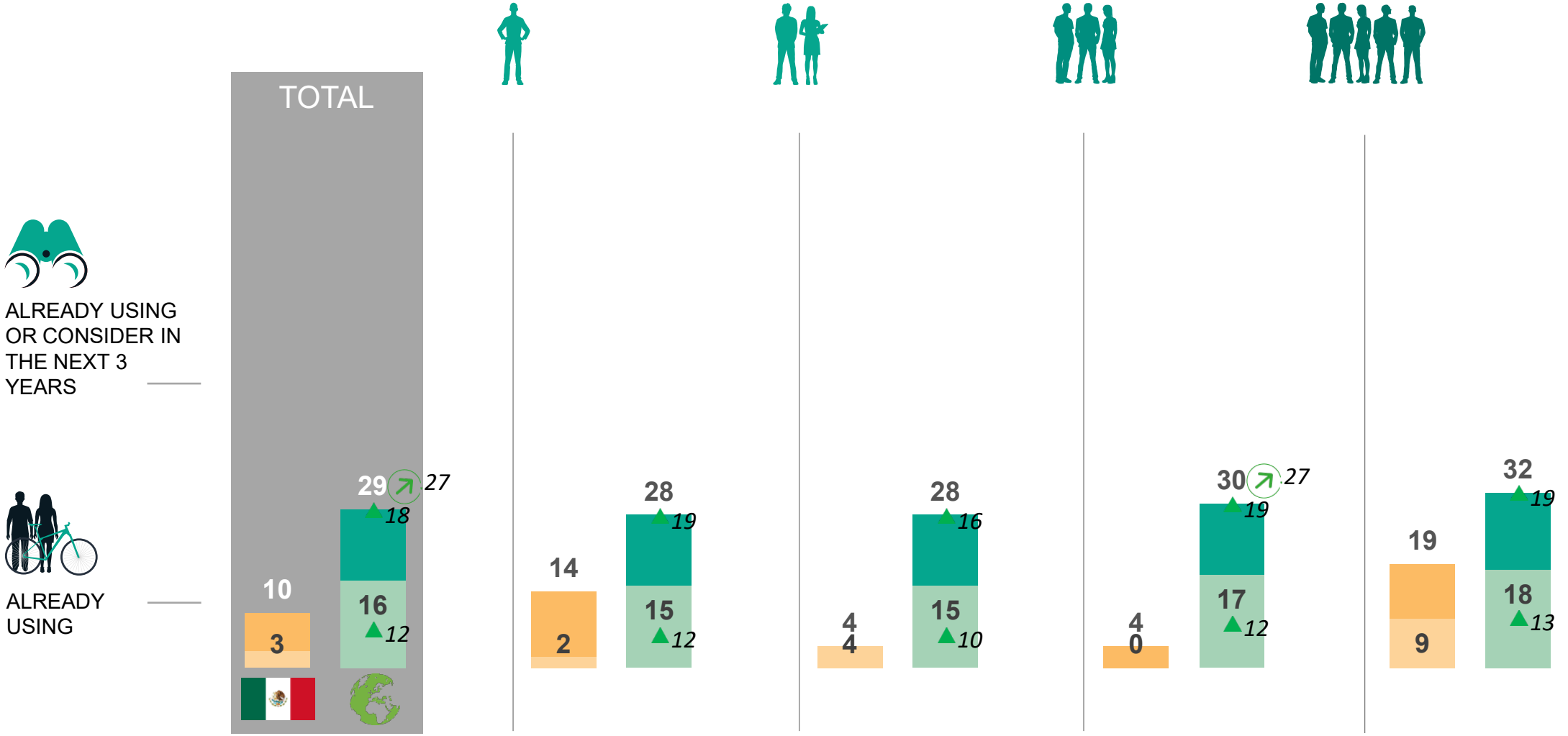


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Question asked to respondents that are aware of mobility solutions

BIKE (OR OTHER TWO WHEELS) SHARING / LEASING IMPLEMENTATION

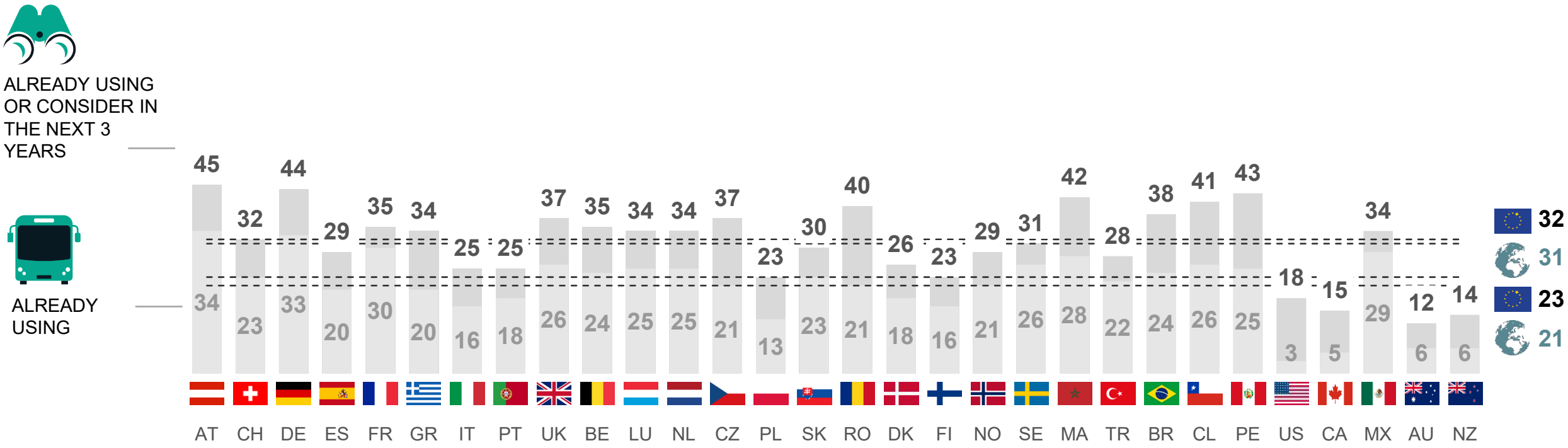
In %



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

PUBLIC TRANSPORT IMPLEMENTATION

In %

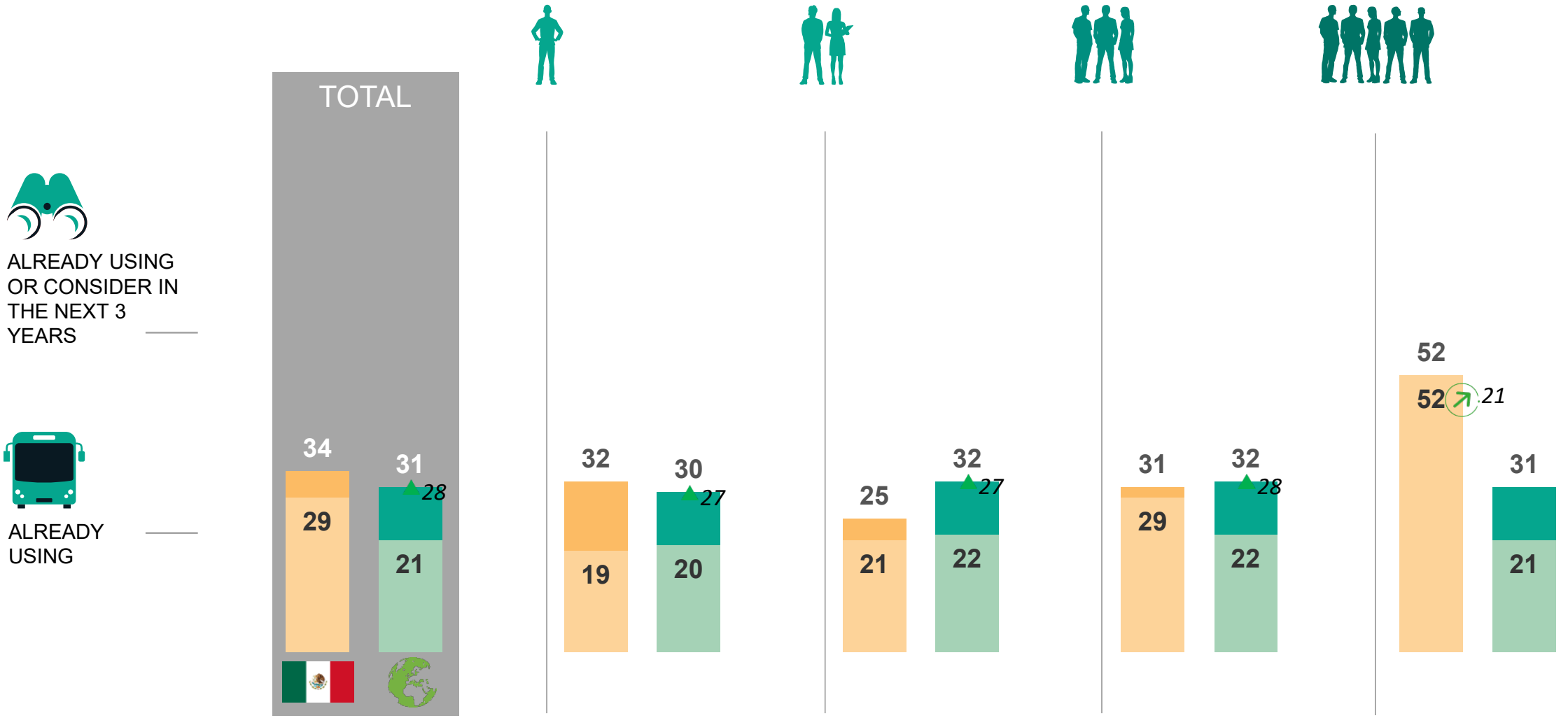


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Basis: companies with corporate vehicles = 100%

Question asked to respondents that are aware of mobility solutions

PUBLIC TRANSPORT IMPLEMENTATION

In %



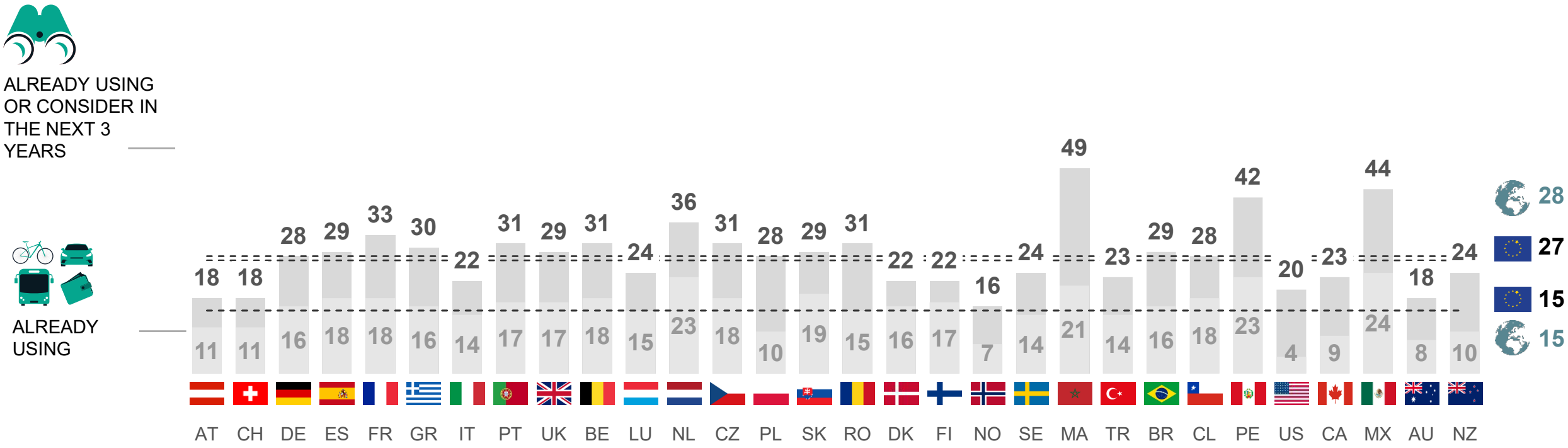
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Question asked to respondents that are aware of mobility solutions

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MOBILITY BUDGET IMPLEMENTATION

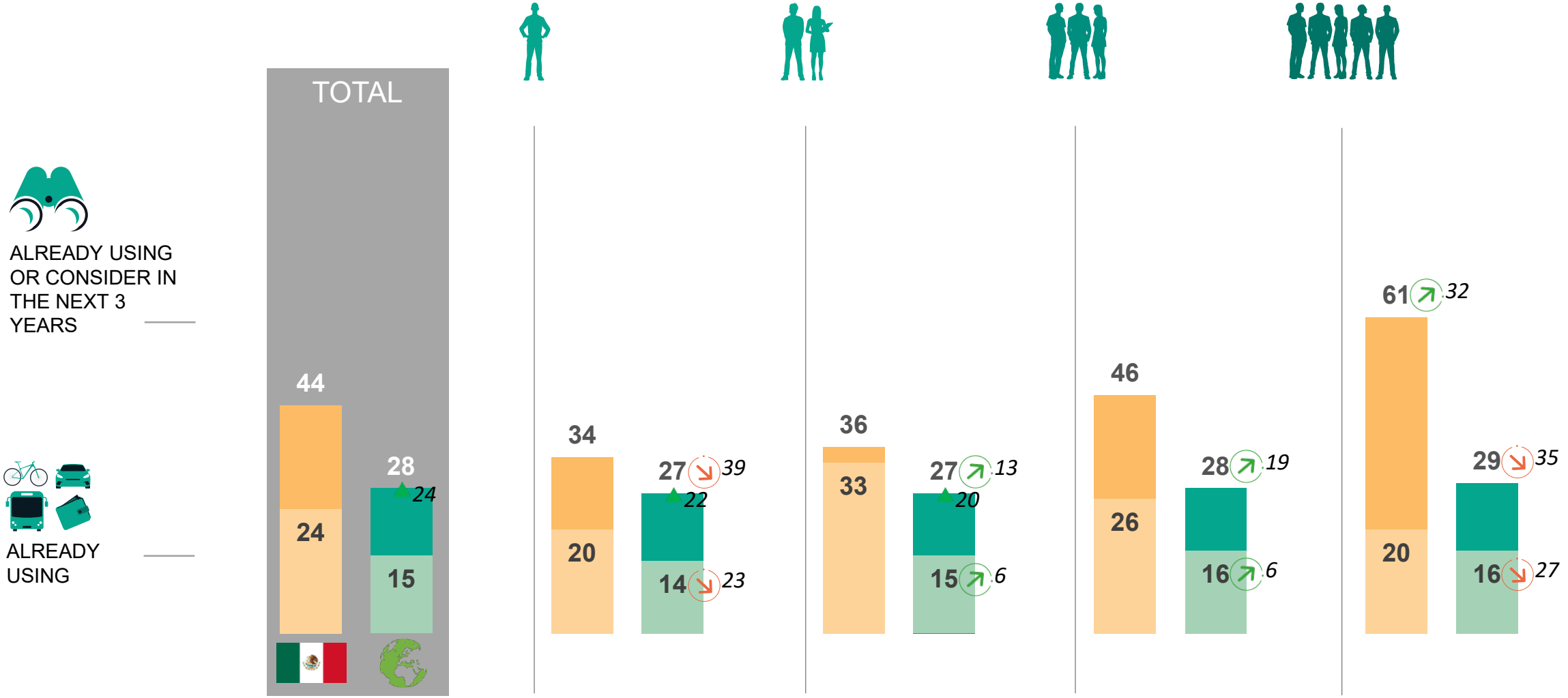
In %



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Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions

MOBILITY BUDGET IMPLEMENTATION

In %

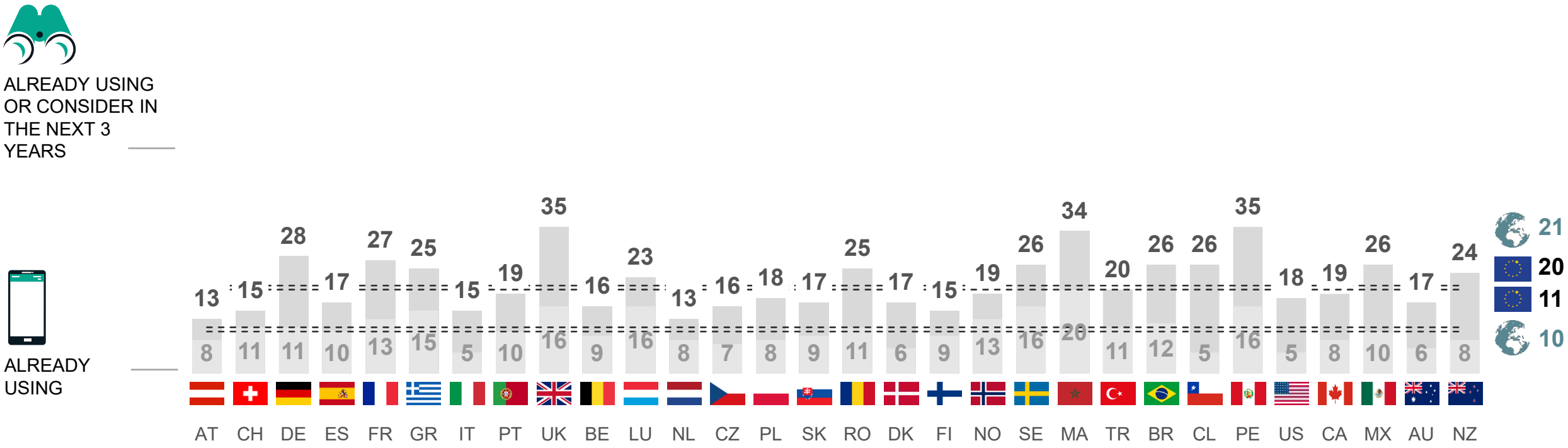


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Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions

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AN APP PROVIDED BY THE COMPANY TO BOOK MOBILITY SOLUTIONS

In %

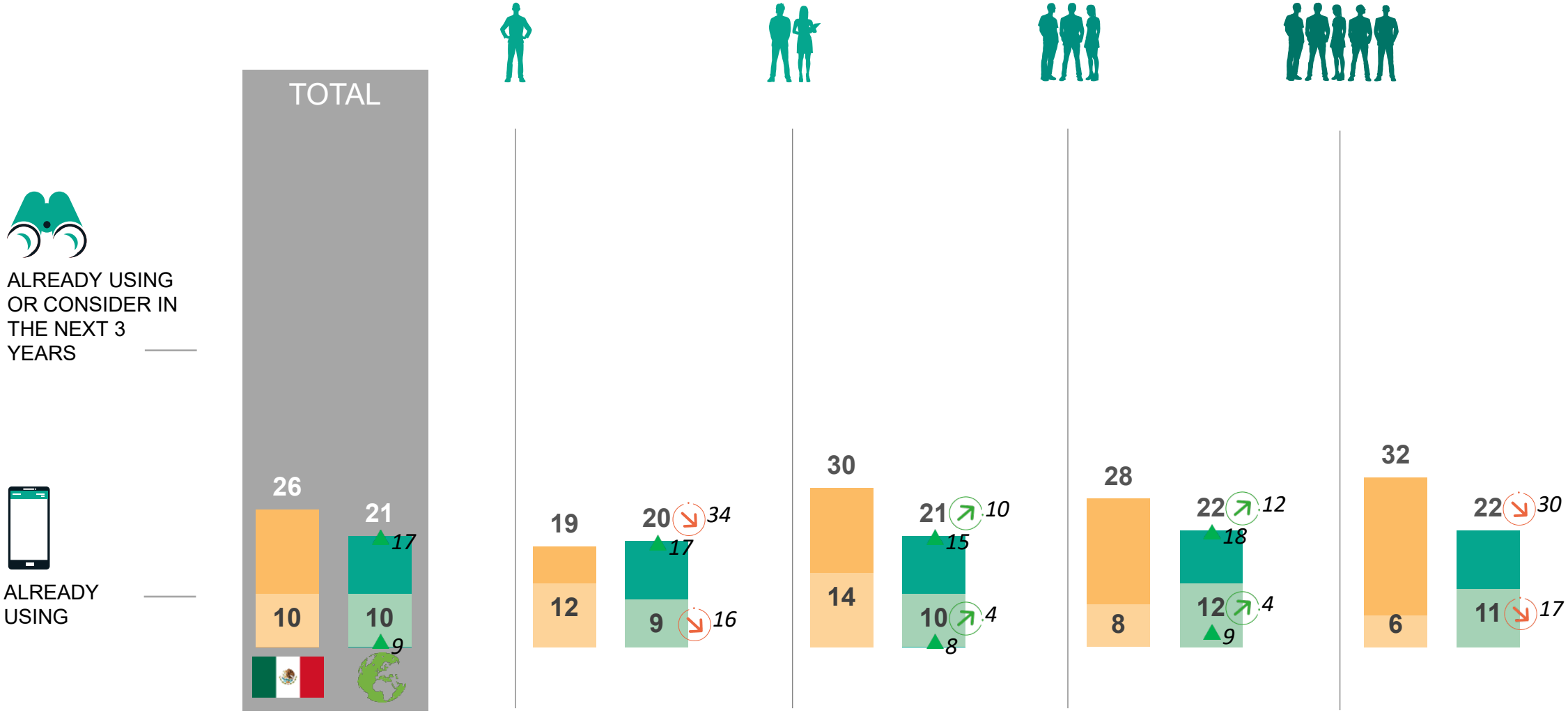


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AN APP PROVIDED BY THE COMPANY TO BOOK MOBILITY SOLUTIONS

In %

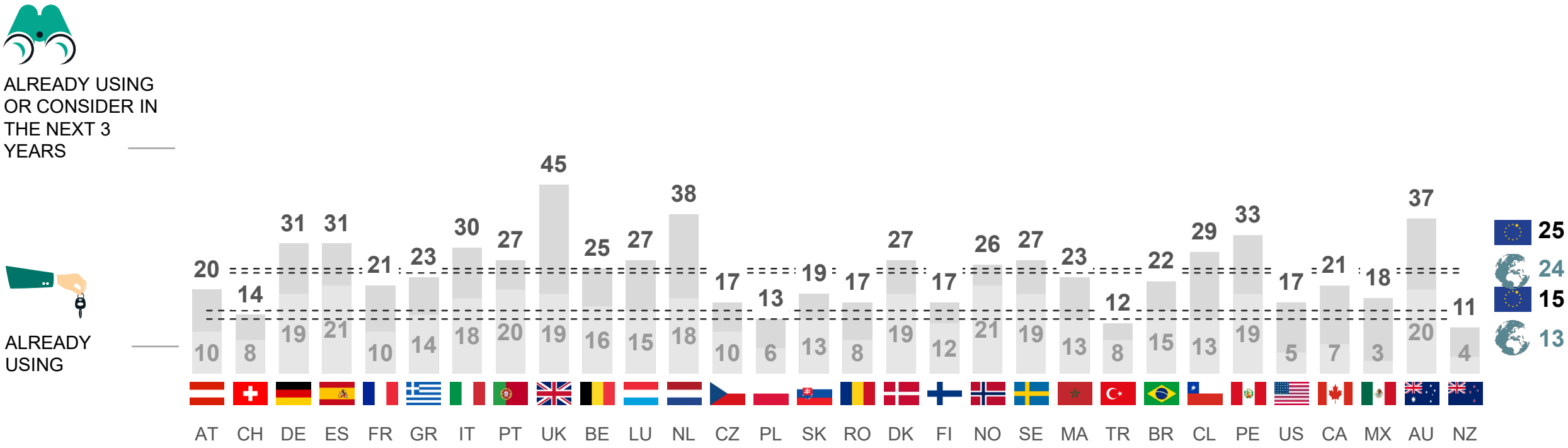


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Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions

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PRIVATE LEASE OR SALARY SACRIFICE IMPLEMENTATION

In %



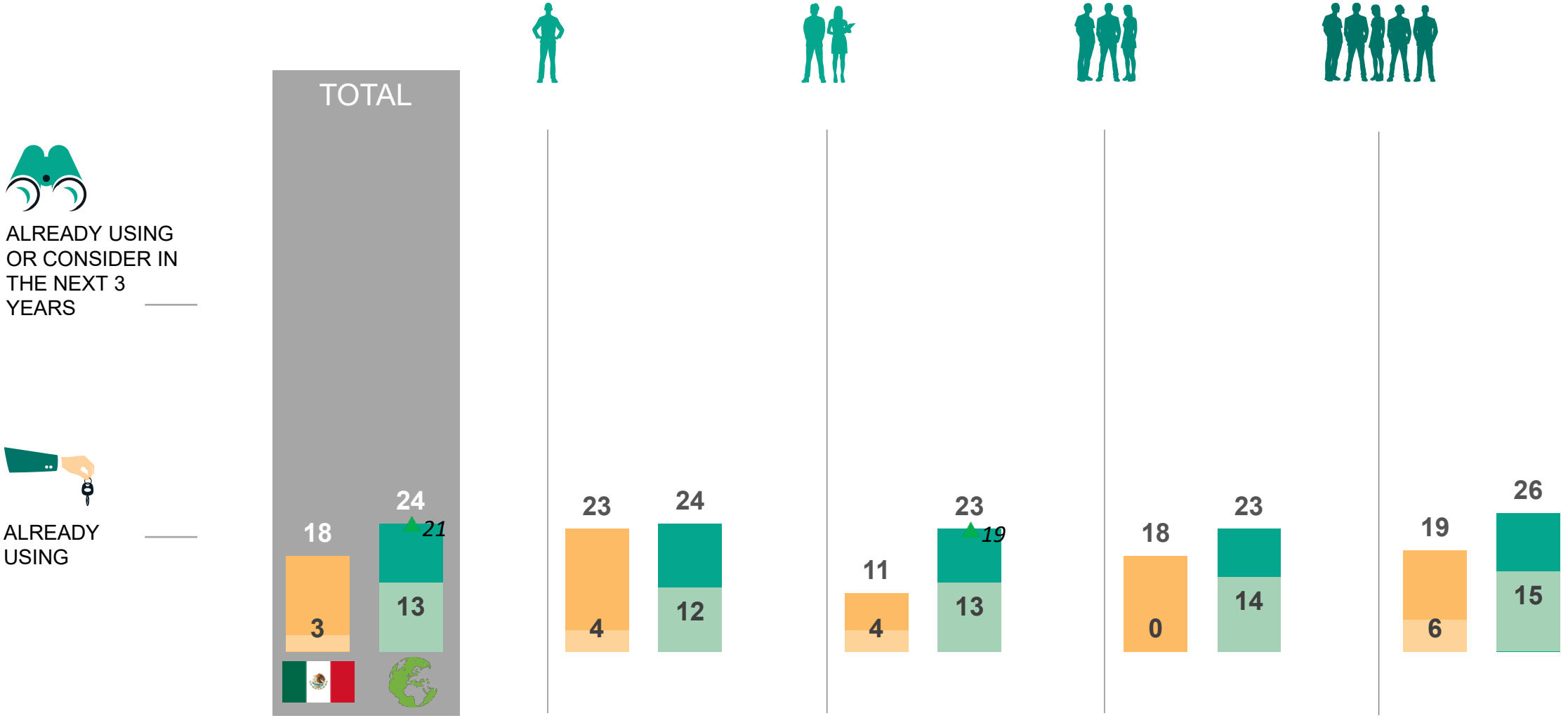
Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%

Question asked to respondents that are aware of mobility solutions

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PRIVATE LEASE OR SALARY SACRIFICE IMPLEMENTATION

In %

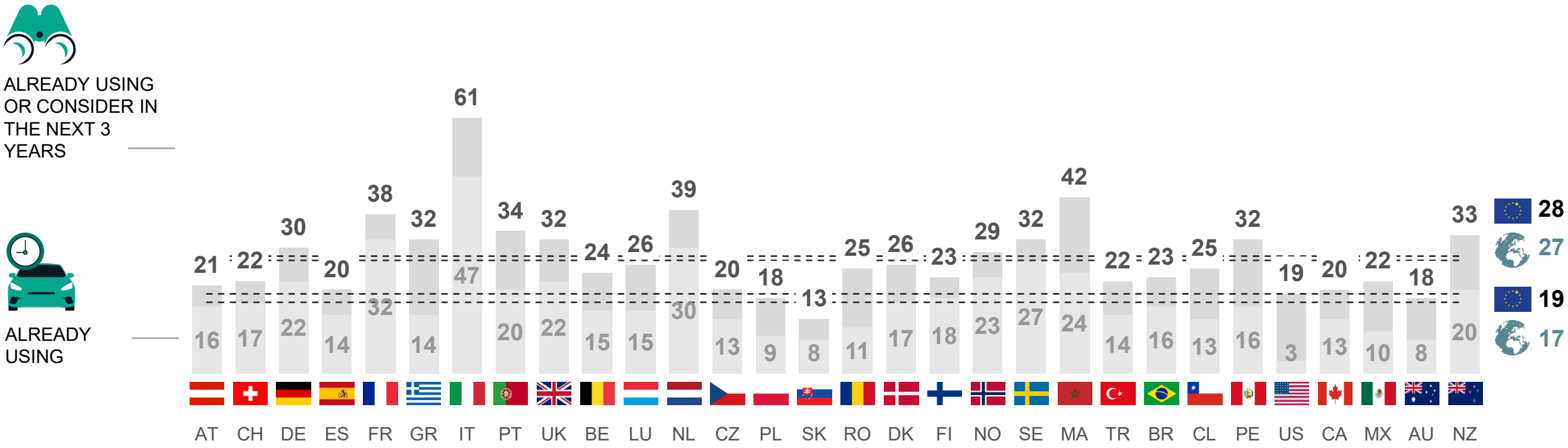


Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions

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SHORT OR MID-TERM RENTAL VEHICLES IMPLEMENTATION

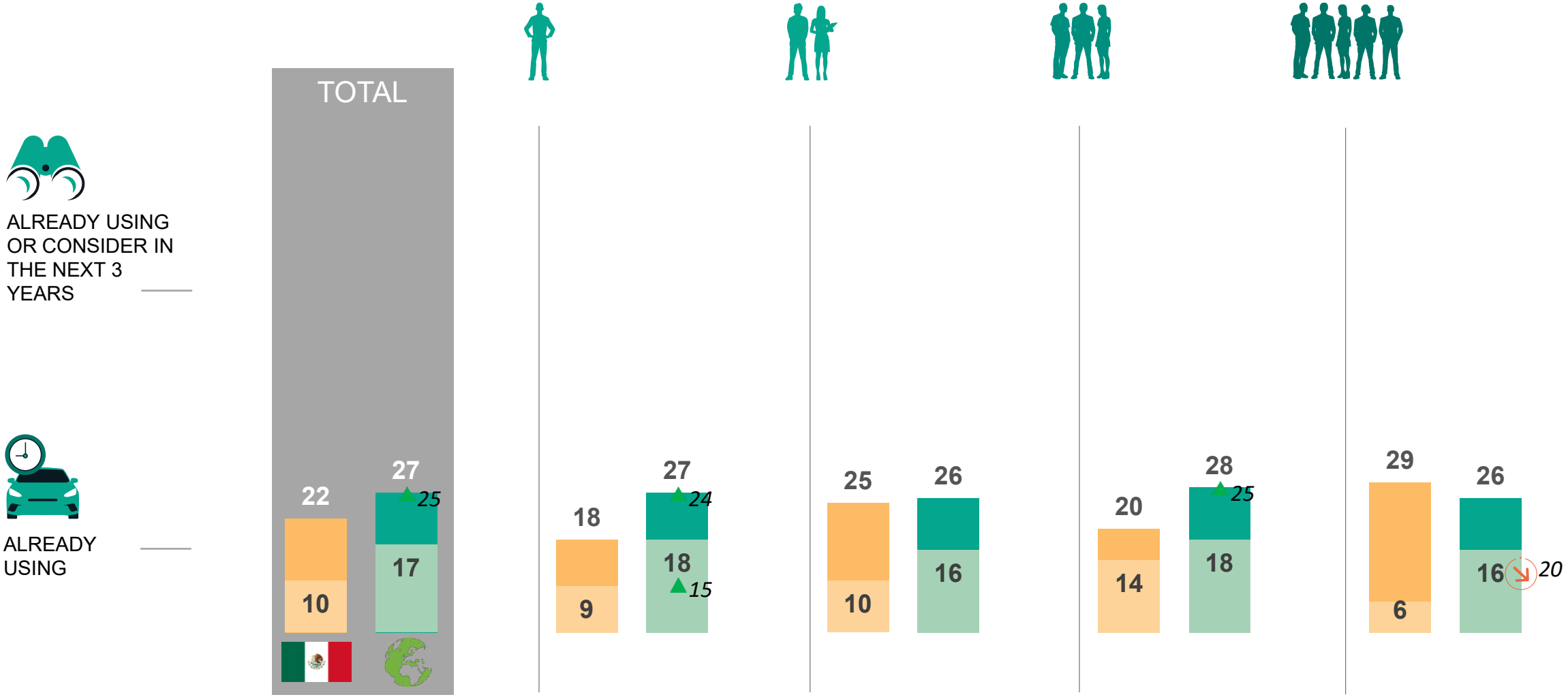
In %



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

SHORT OR MID-TERM RENTAL VEHICLES IMPLEMENTATION

In %



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

Question asked to respondents that are aware of mobility solutions

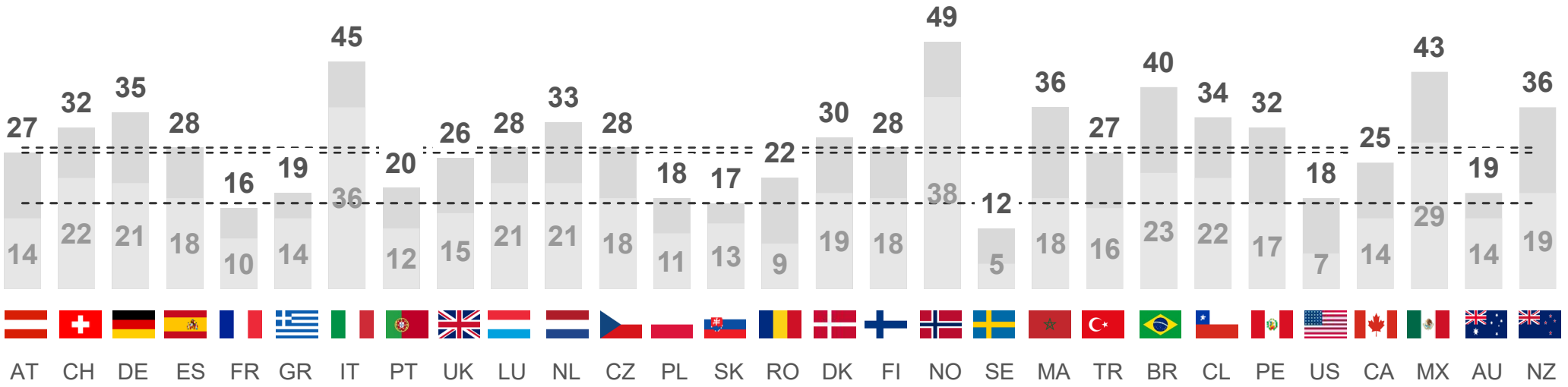
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CAR OR CASH ALLOWANCE IMPLEMENTATION

In %

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

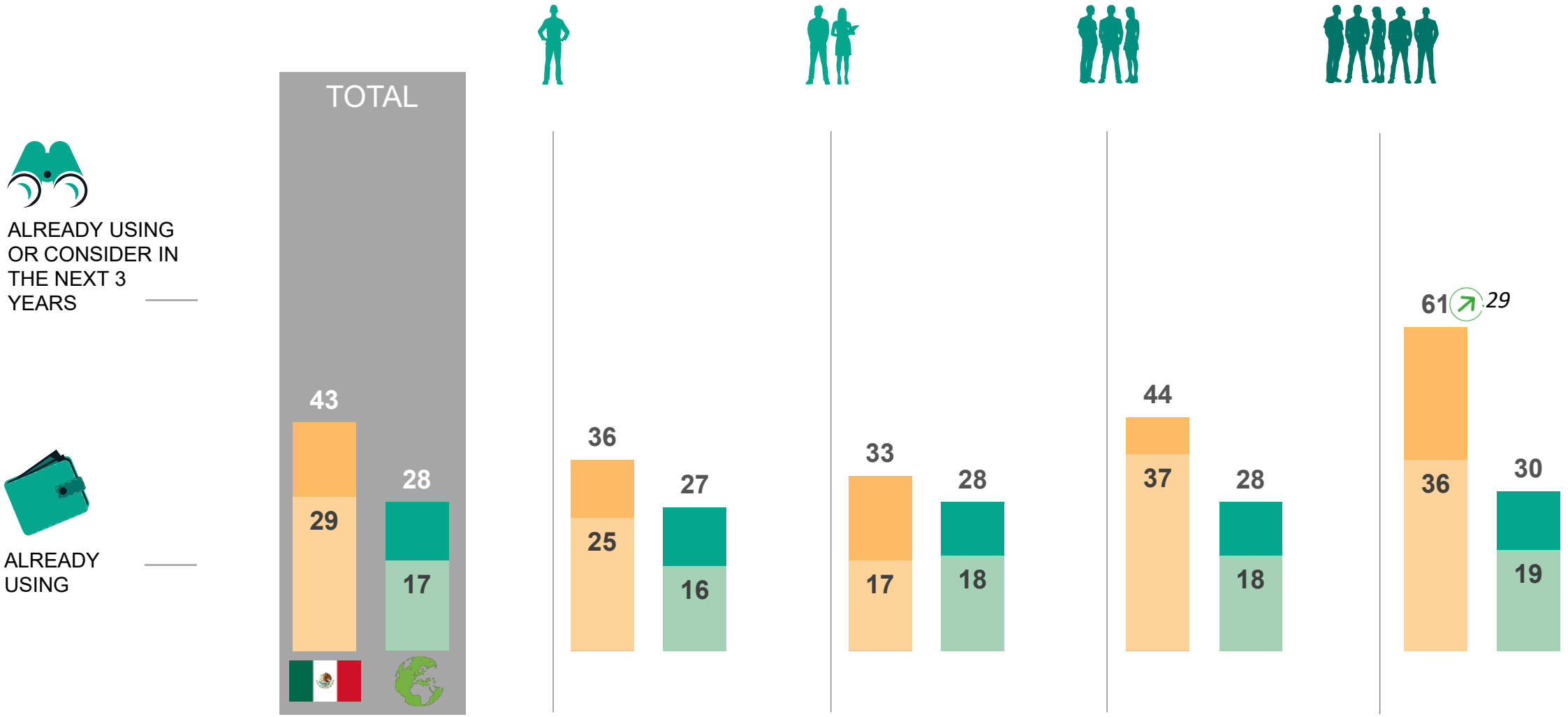
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CAR OR CASH ALLOWANCE IMPLEMENTATION

In %

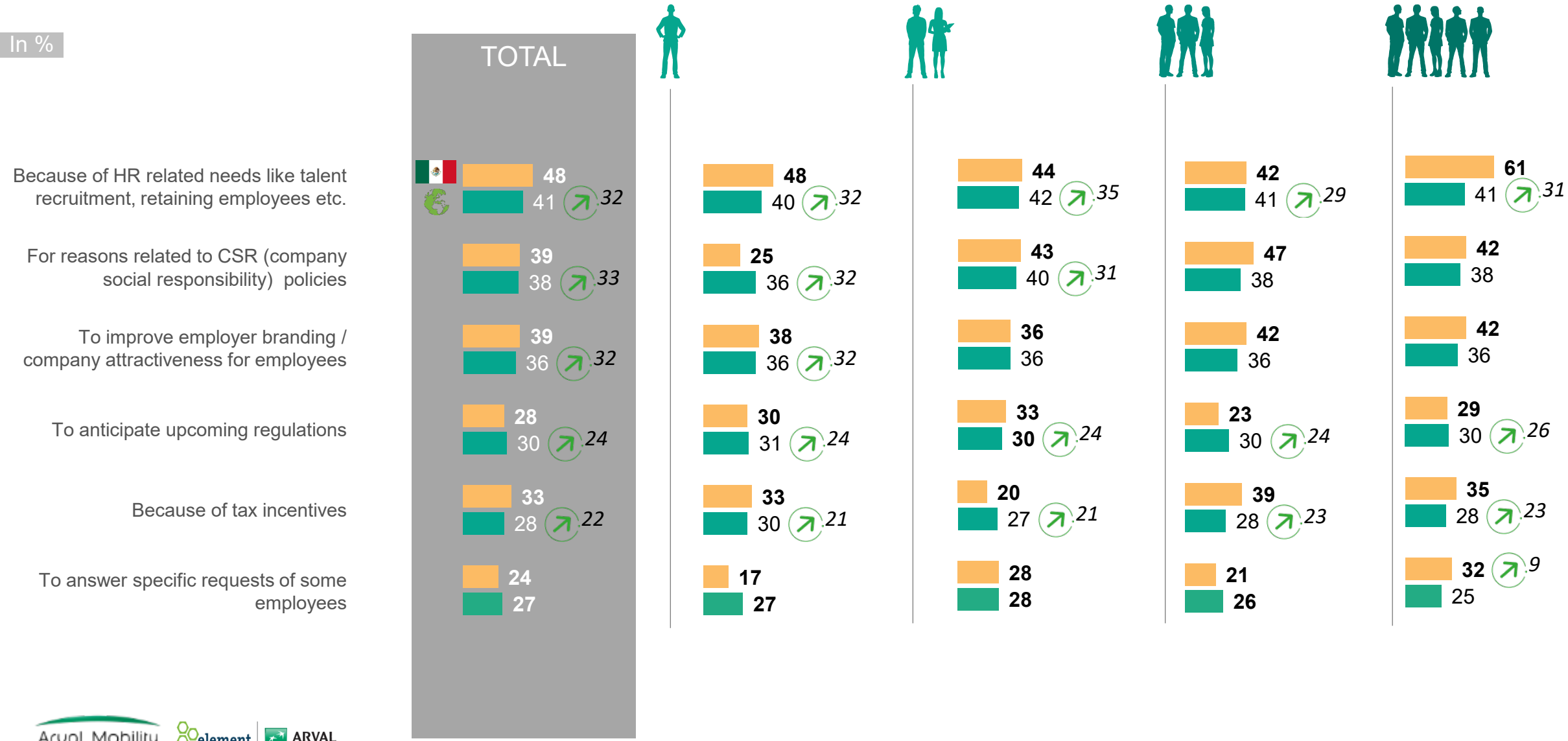


Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions

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REASONS FOR IMPLEMENTING OR CONSIDERING MOBILITY SOLUTIONS

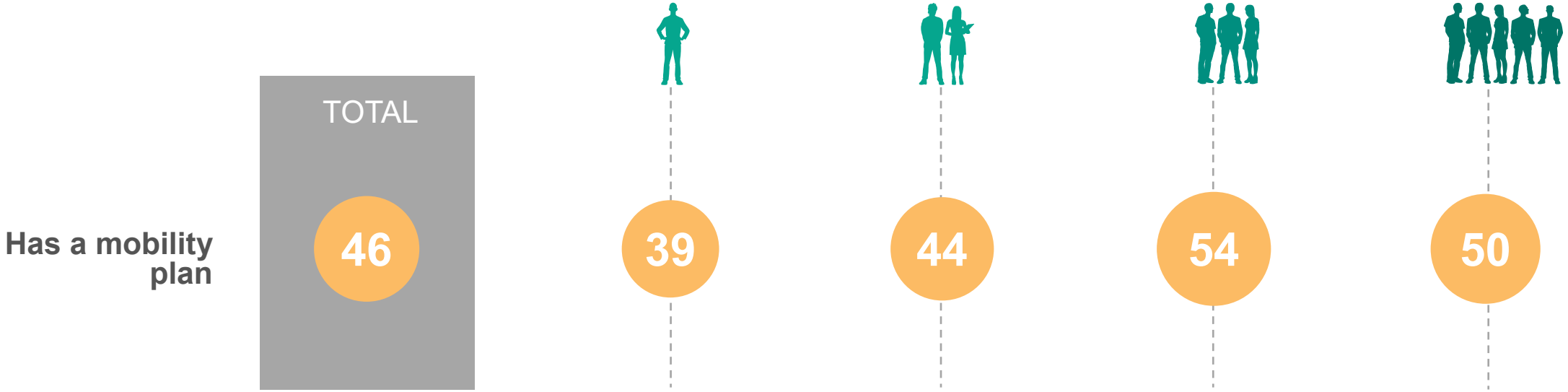
In %



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 PLAN IMPLEMENTATION

In %



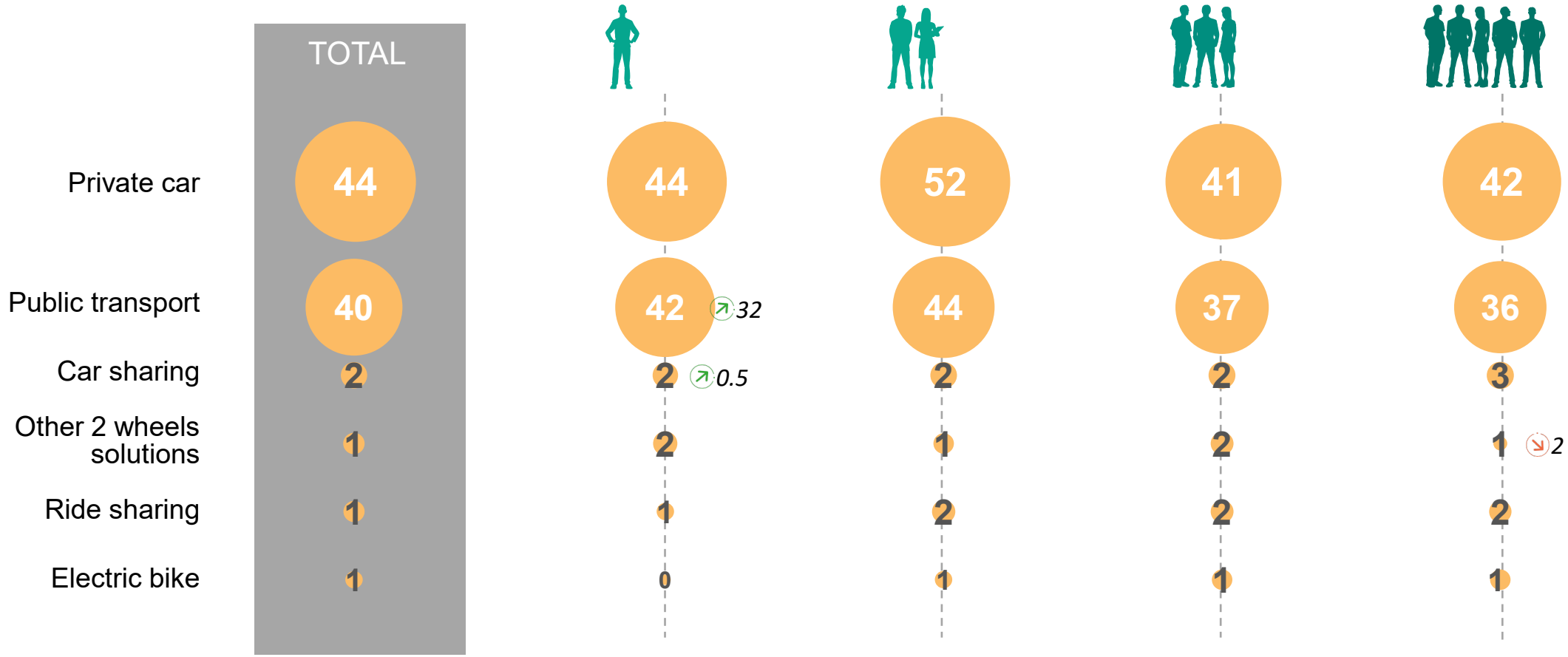
Does your company have a Mobility Plan?
Basis: mobility as a strategic factor

MEANS OF COMMUTING TO WORK

HOW TO READ THE RESULTS?

In Mexico, companies claim that on average, 44.29% of employees use private car to commute to the workplace

In %

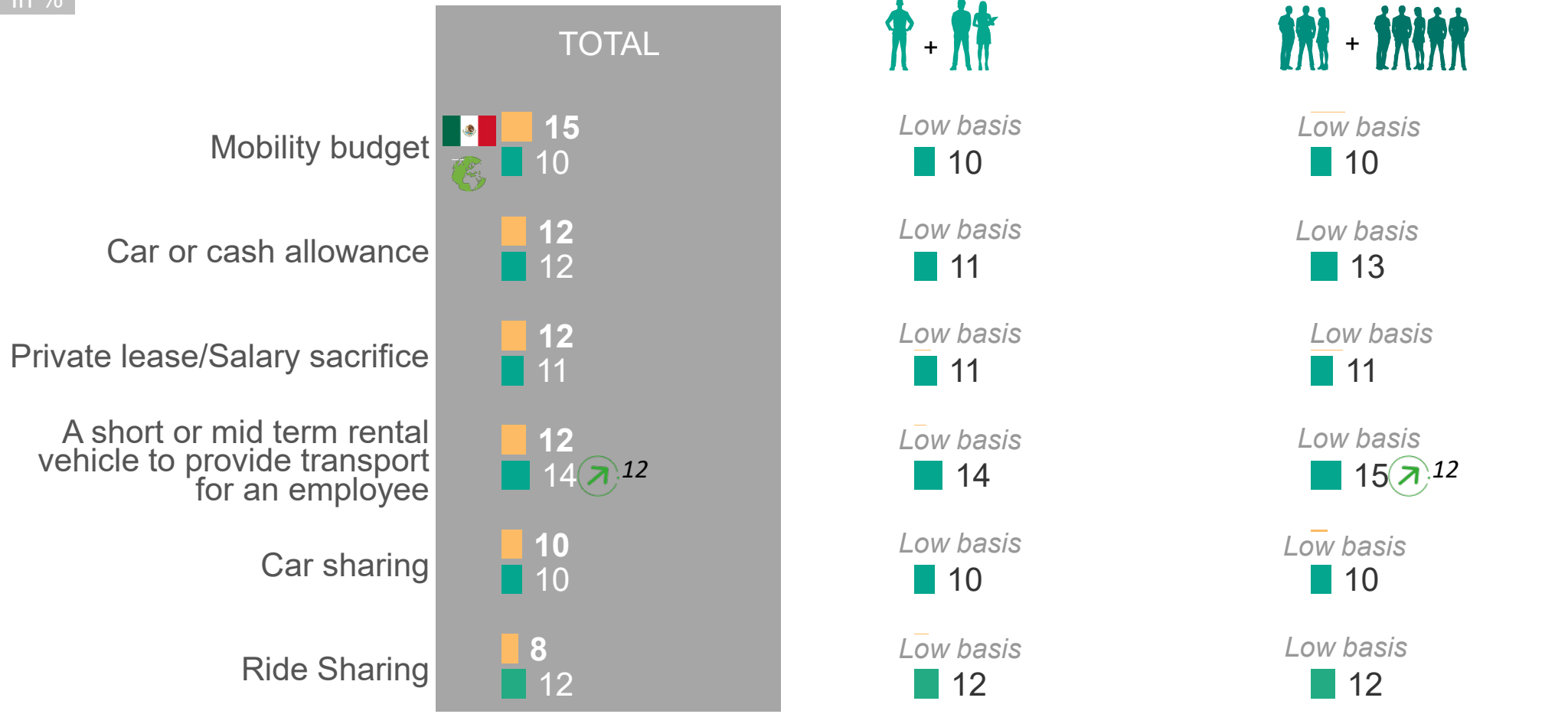


What percentage of your employees use each of the following means of transportation to go to the workplace ?
Basis: companies with corporate vehicles = 100%

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

Certainly

In %



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

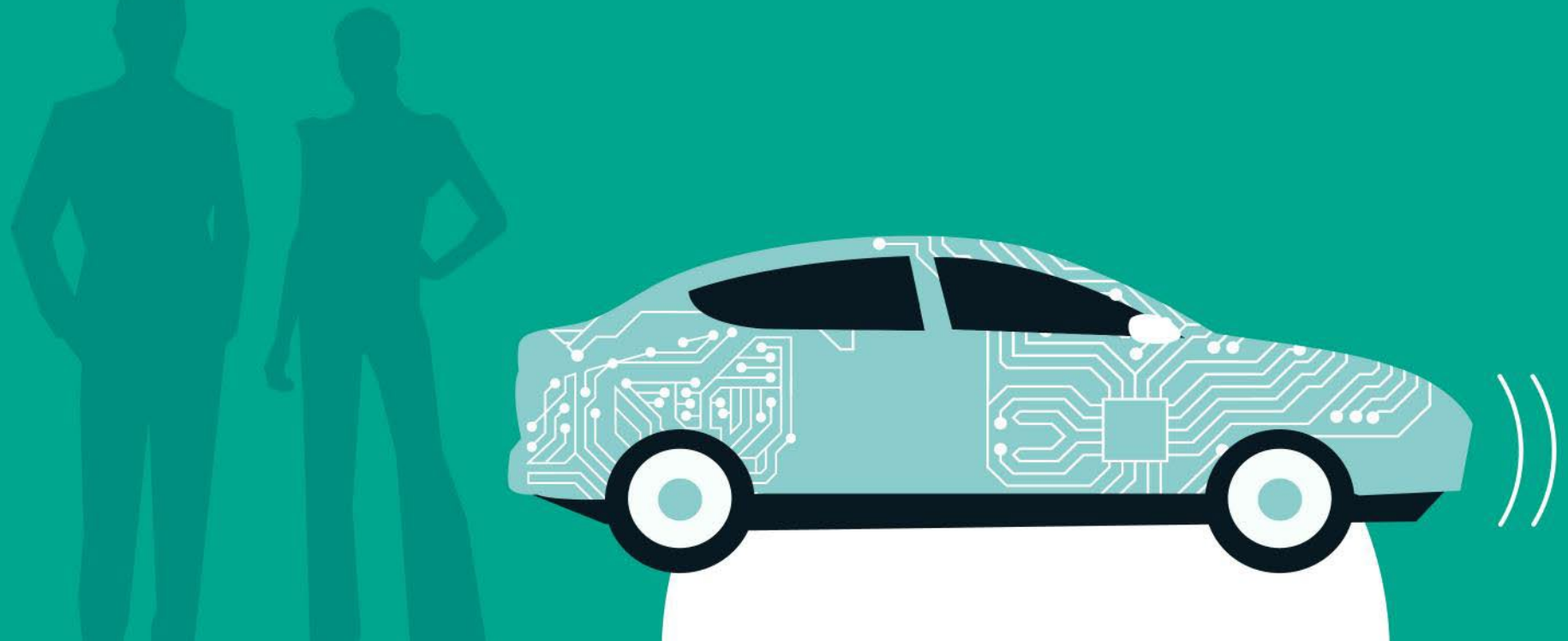
Basis: companies using or considering at least one mobility solution

Question asked to respondents that are aware of mobility solutions

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7

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



HIGH USE OF TELEMATICS IN MEXICO

1

In Mexico, the use of telematics is widely widespread, with **6 out of 10 companies being equipped with connected vehicles**, ahead of the 40% global average. Same level of equipment for passenger cars and for LCVs.

To note, **large companies are more equipped** with connected vehicles – 8 out of 10 among the >250 employees companies.

2

Overall, **3 out of 4 companies are already using or consider using the data coming from the vehicle box thanks to a telematics platform** in the next 3 years. Current usage is limited (21%) but still somehow above the 16% global average though.

CONNECTED VEHICLES



USE OF CONNECTED VEHICLES

56%

40%



USE OF TELEMATICS DATA

Already using 21%

16%

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

All vehicles

In %

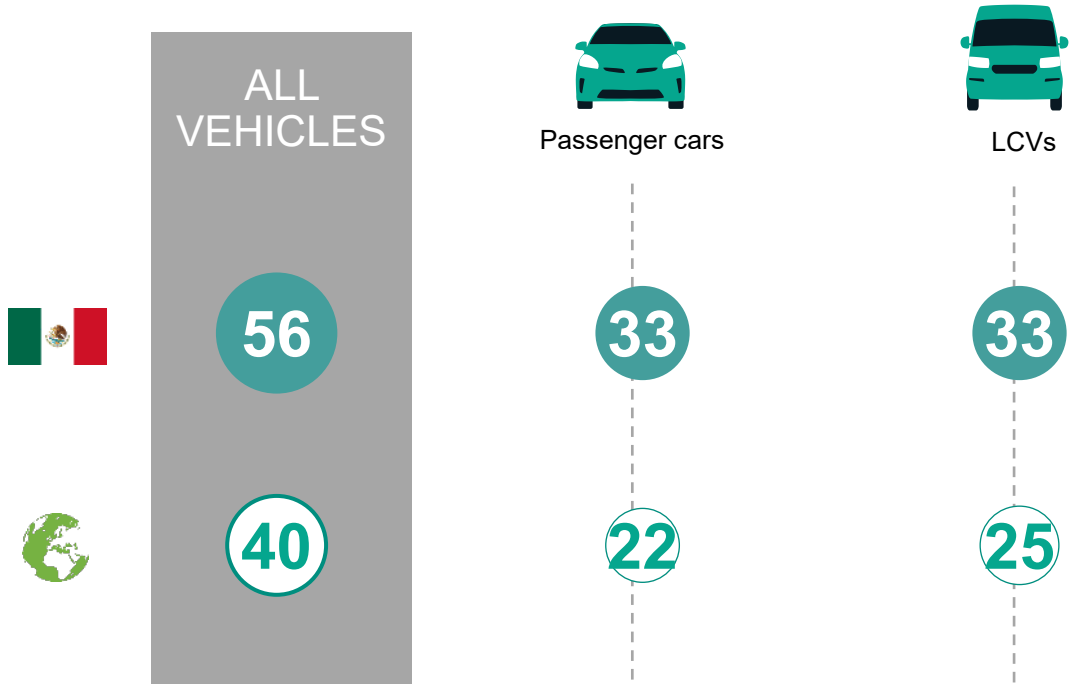
Passenger cars + LCVs

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

HOW TO READ THE RESULTS ?

56% of companies with fleet using connected vehicles for all or part of their fleet.

33% use connected vehicles for passenger cars, while 33% use connected vehicles for LCVs.



Change of definition in 2024. No comparison with 2023

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

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

All vehicles

In %

Passenger cars + LCVs

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



Change of definition in 2024. No comparison with 2023

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

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

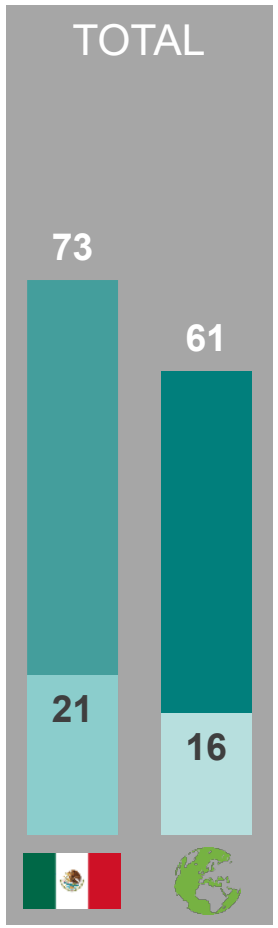
All vehicles

In %

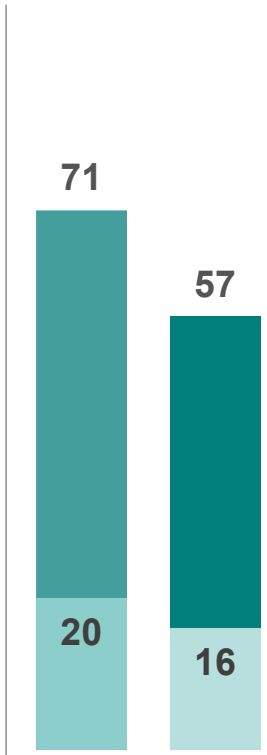
Passenger cars + LCVs

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



Passenger cars



LCVs



HOW TO READ THE RESULTS ?

73% 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.
21% of companies are currently using the data.

New question added in 2024

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

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

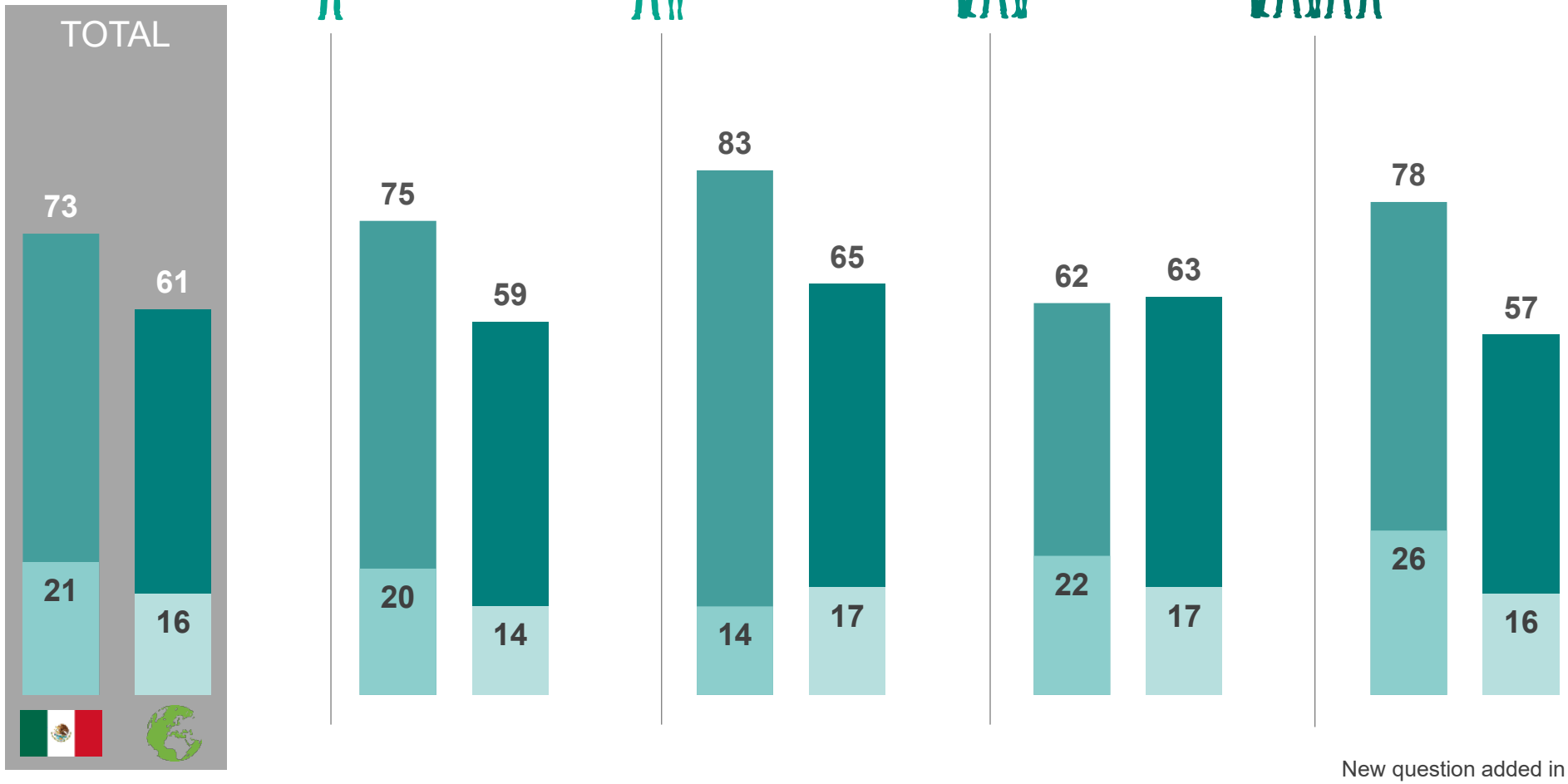
All vehicles

In %

Passenger cars + LCVs

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



New question added in 2024

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

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

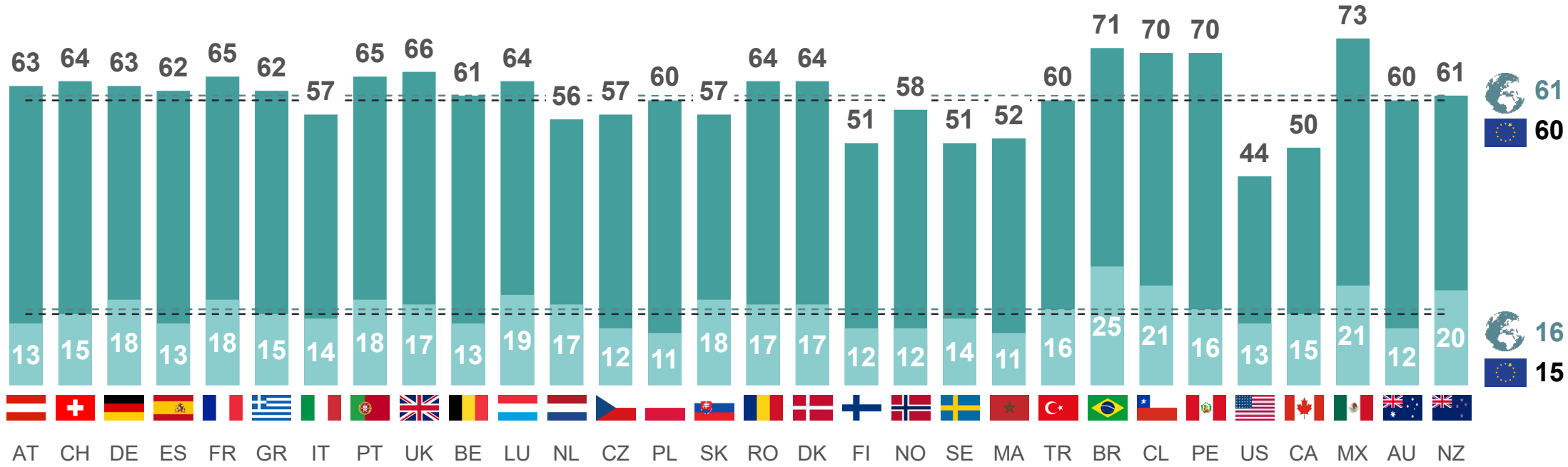
All vehicles

In %

Passenger cars + LCVs

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



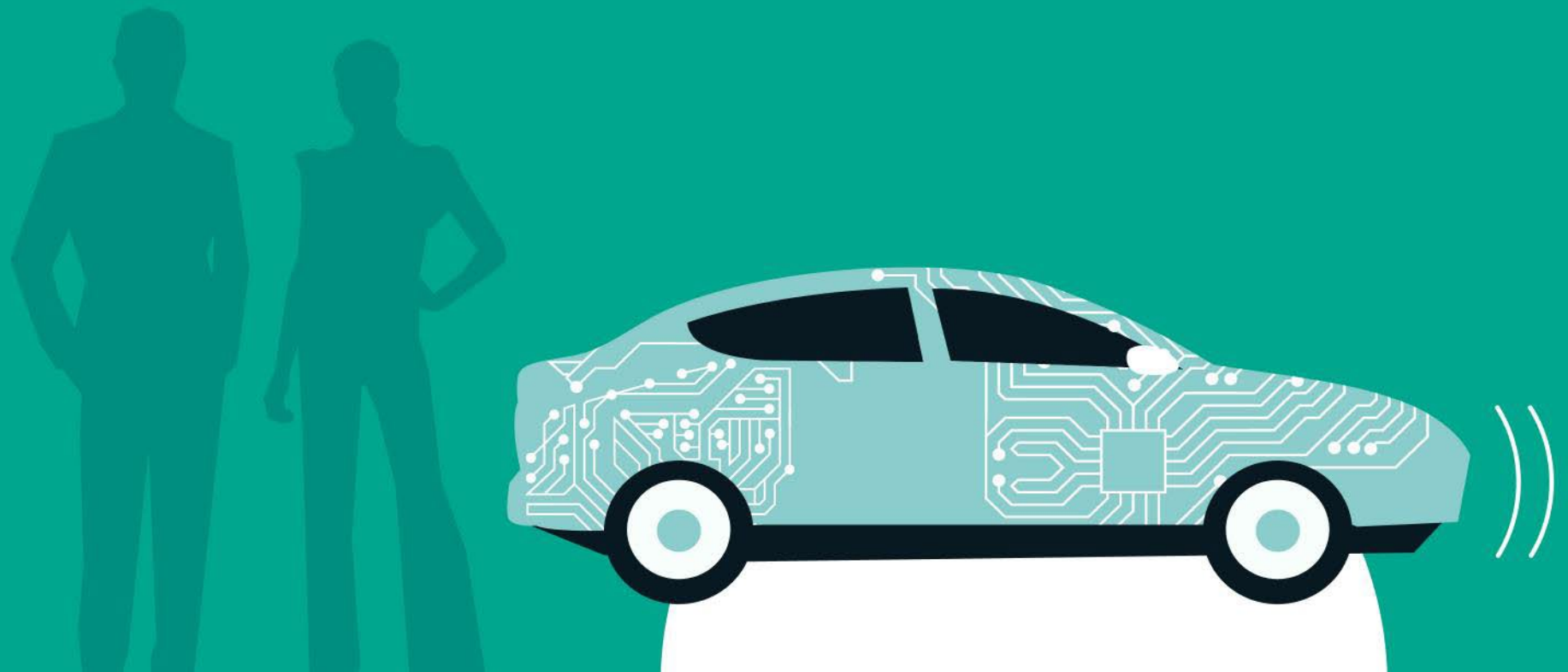
New question added in 2024

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

7

CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY

A. PASSENGER CARS



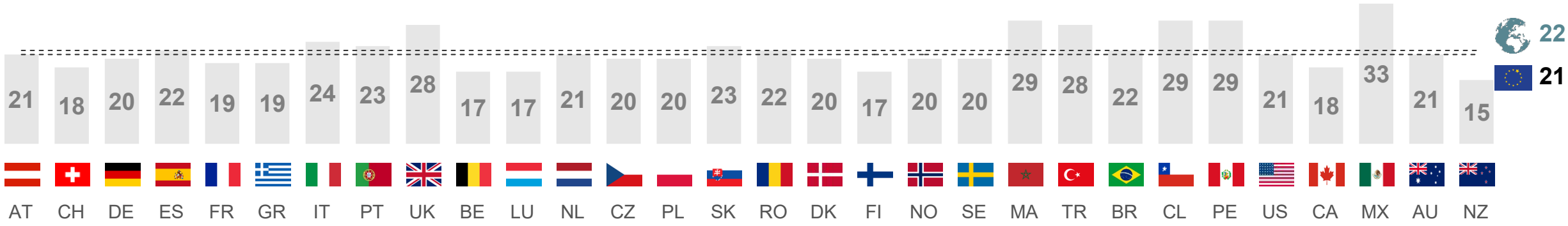
PROPORTION OF COMPANIES USING CONNECTED VEHICLES

Passenger cars

In %

Passenger cars

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

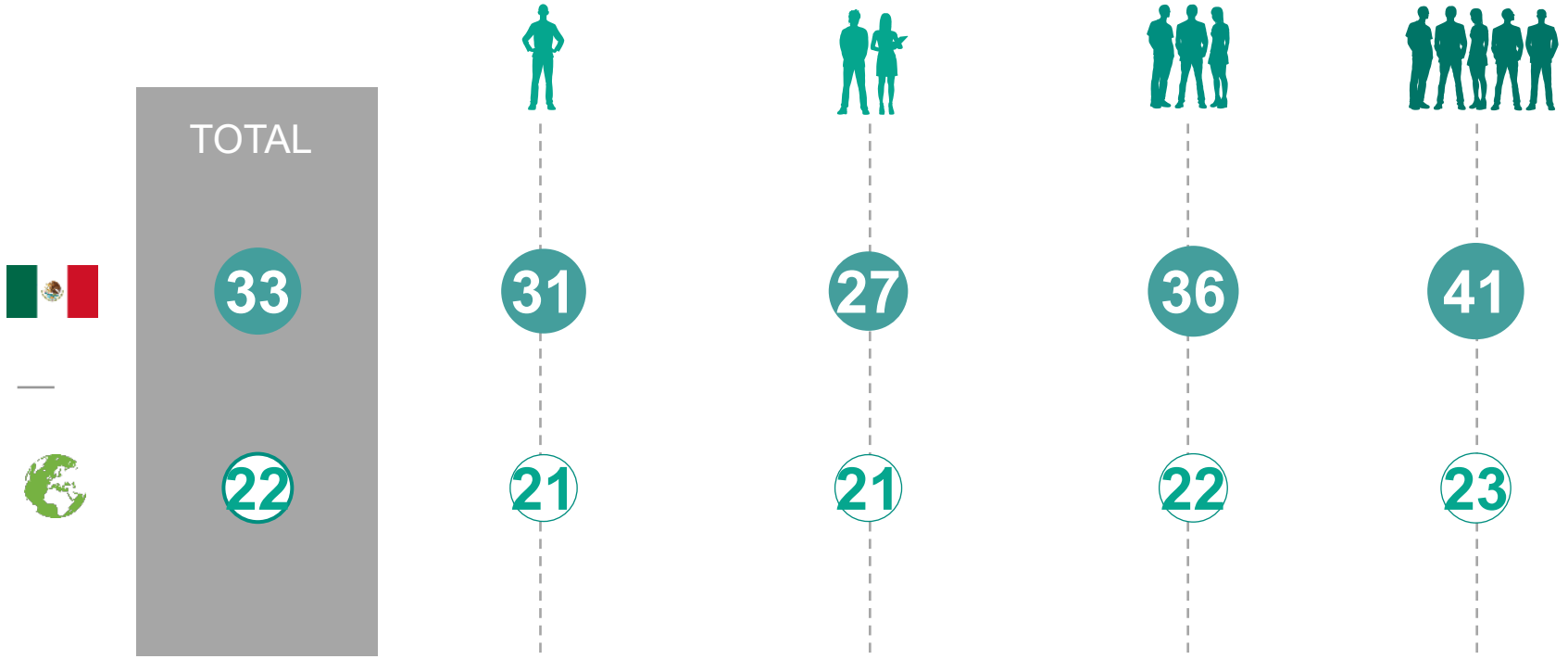
In %

Passenger cars

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

HOW TO READ THE RESULTS ?

33% 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

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PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

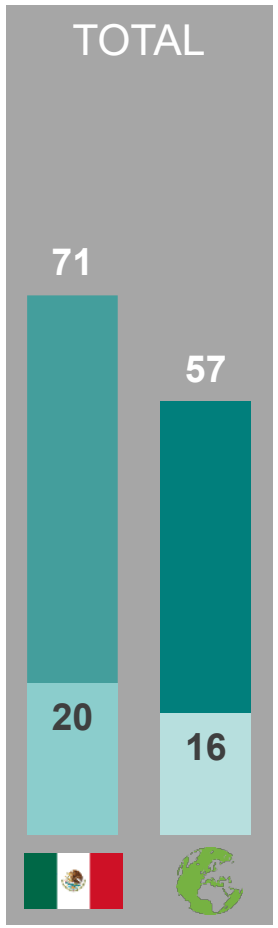
Passenger cars

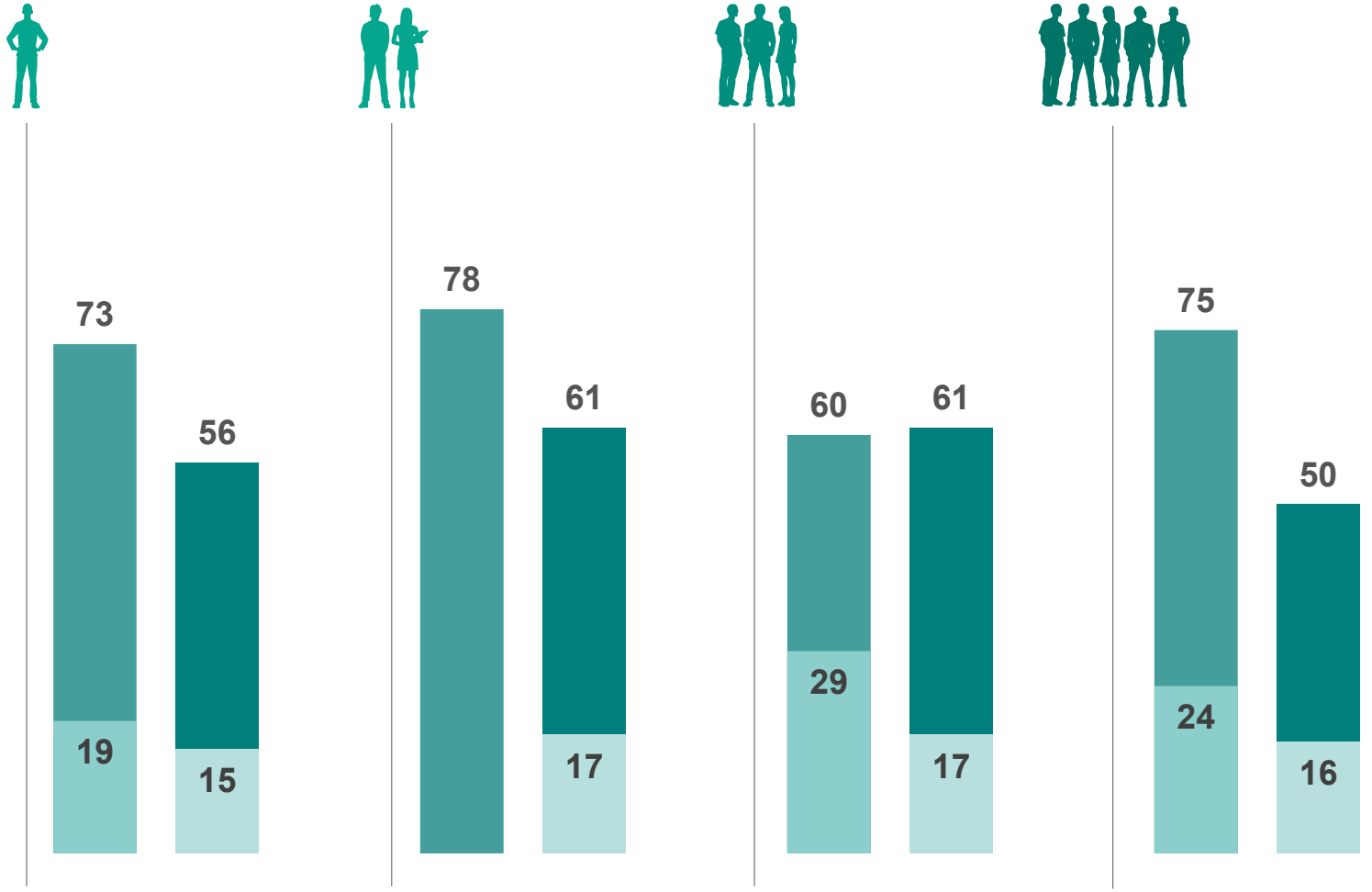
In %

Passenger cars

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING





New question added in 2024

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

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

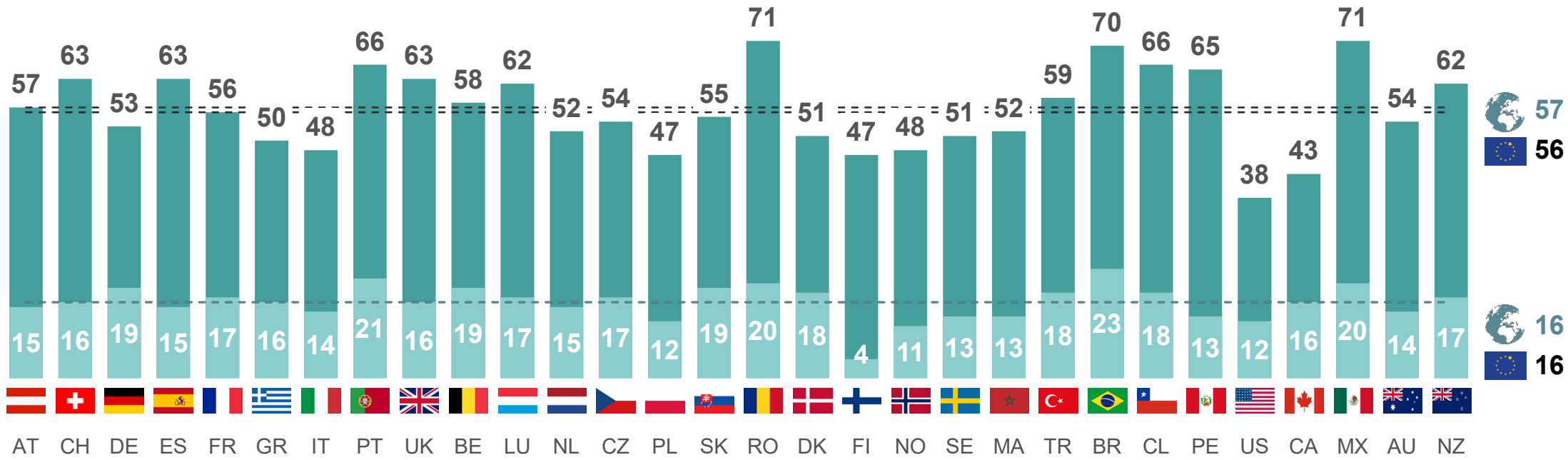
Passenger cars

In %

Passenger cars

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



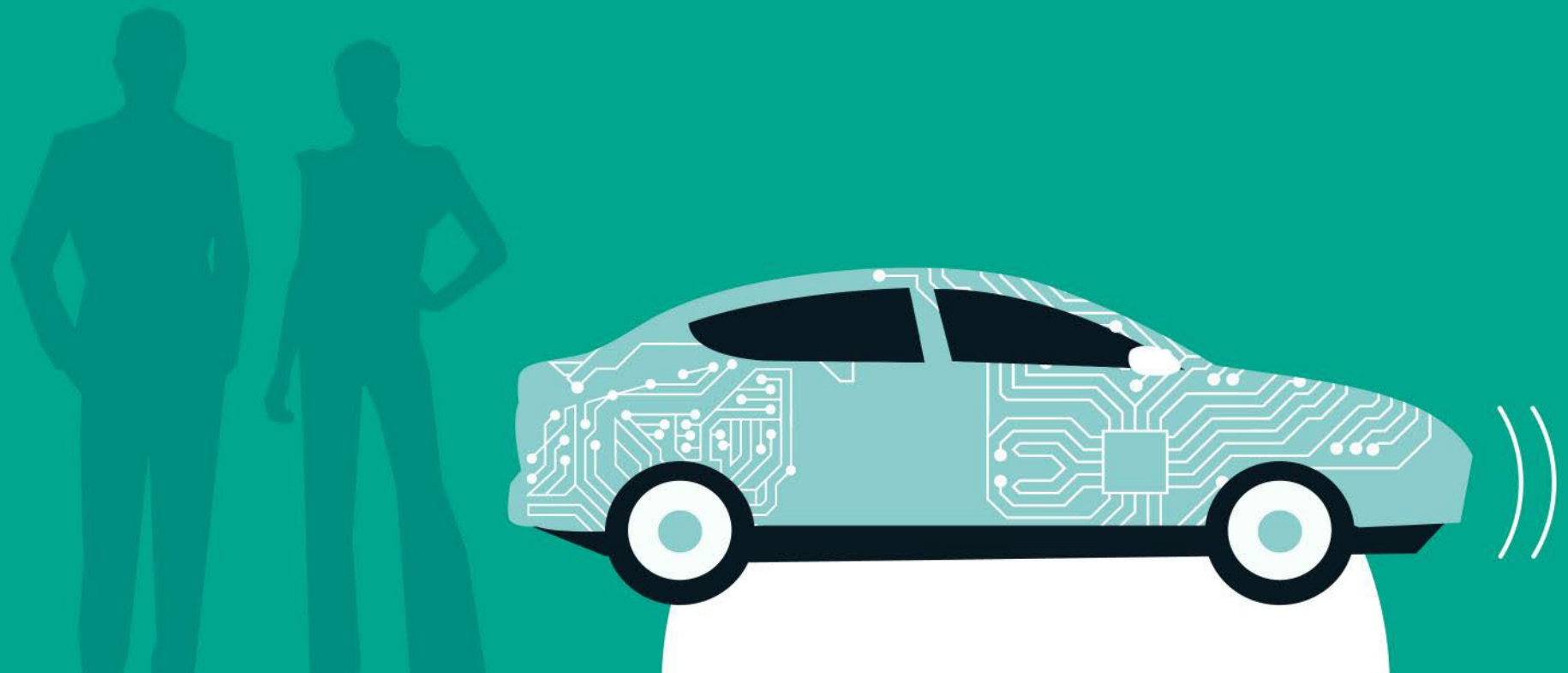
New question added in 2024

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

7

CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY

B. LCVs



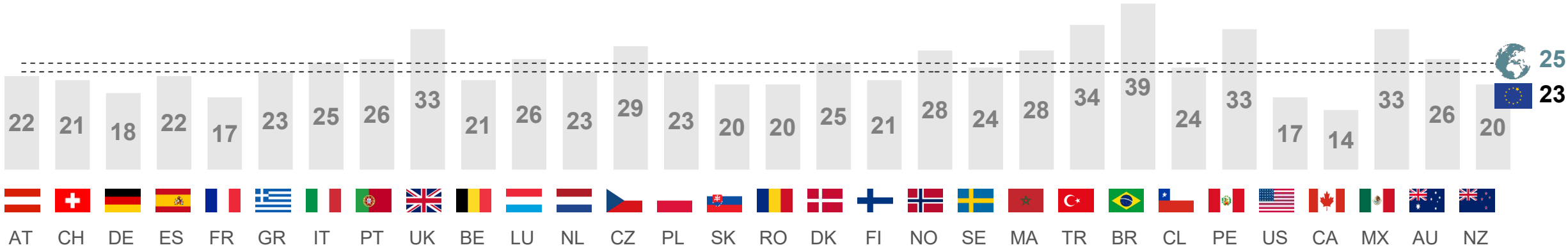
PROPORTION OF COMPANIES USING CONNECTED VEHICLES

LCVs

In %

LCVs

PROPORTION OF COMPANIES USING CONNECTED VEHICLES FOR THEIR LCVs



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

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

LCVs

In %

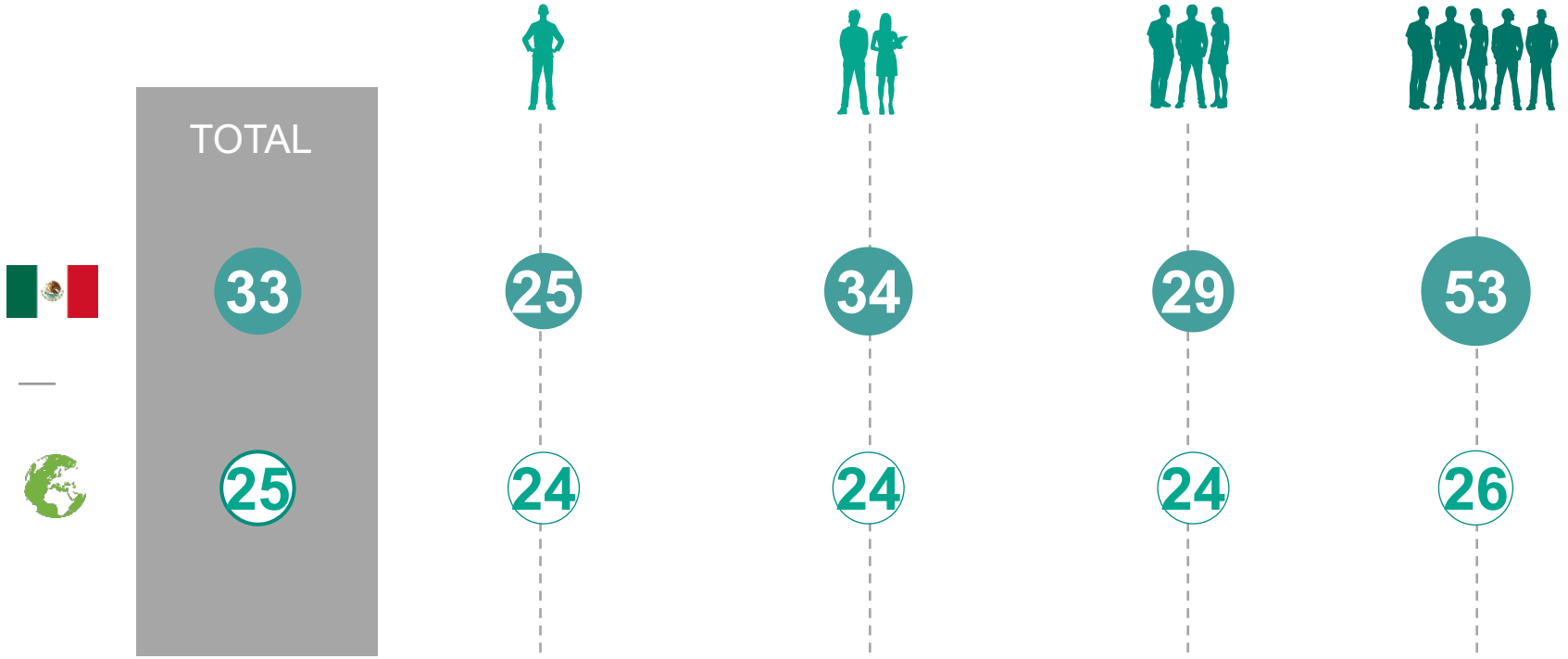


LCVs

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

HOW TO READ THE RESULTS ?

33% use connected vehicles for LCVs.



Change of definition in 2024. No comparison with 2023

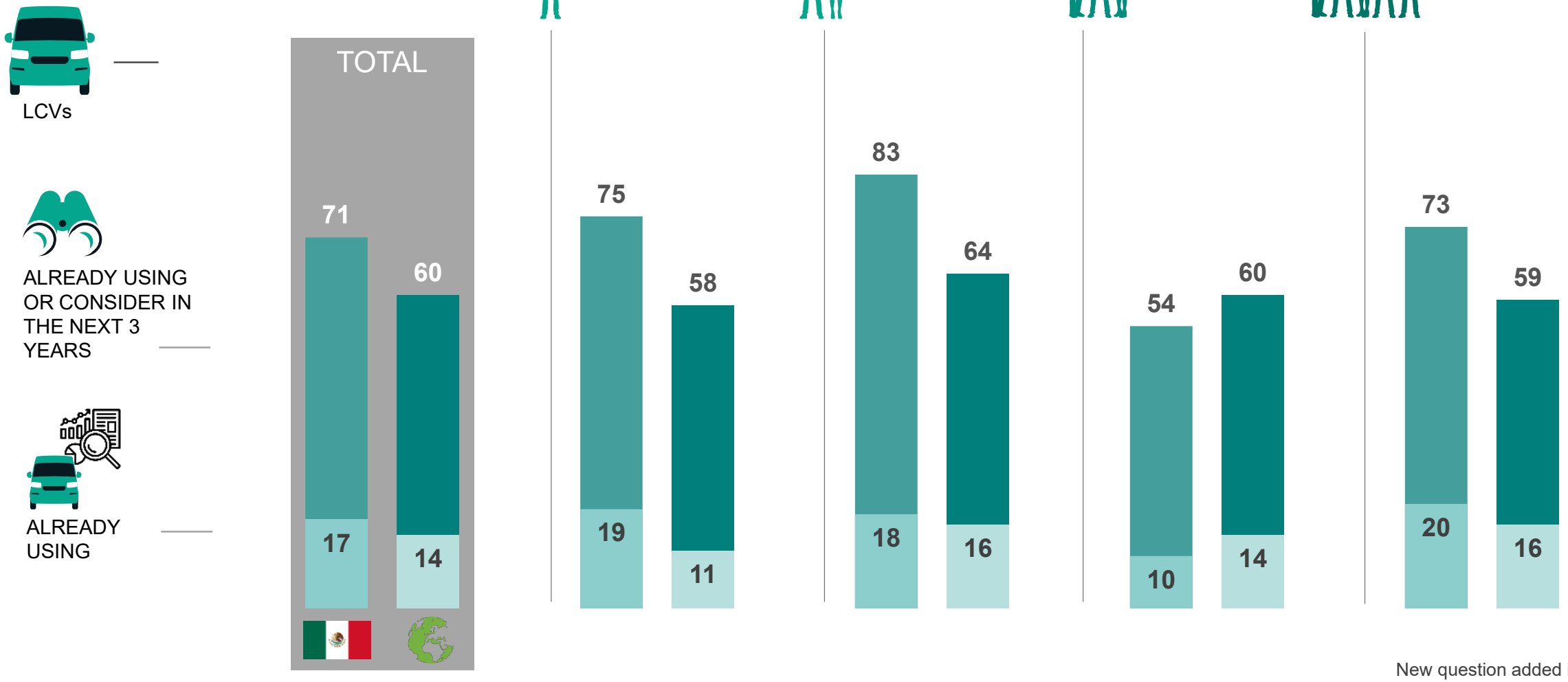
Is your fleet connected thanks to a telematic tool?
Telematics enables transmission of data to the fleet manager to monitor fuel consumption, driver behaviour, vehicle location, driver's impact on environment... from vehicles on the move. Data is transmitted by means of an original or after sales equipment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

Basis: companies with at least one LCV car in fleet

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

LCVs

In %



New question added in 2024

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

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

LCVs

In %



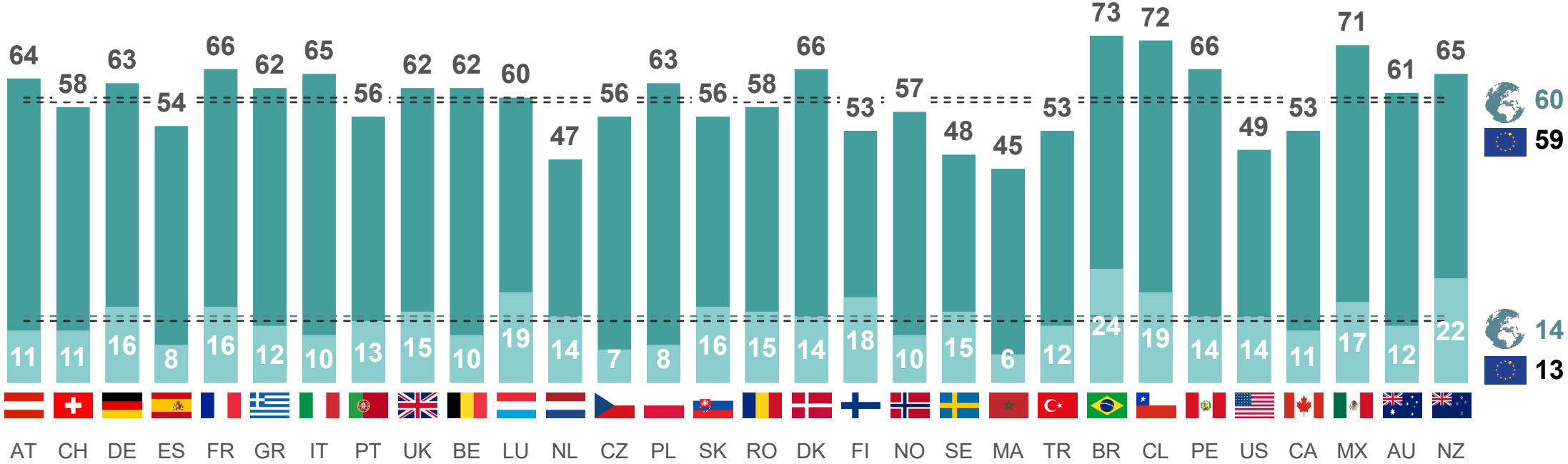
LCVs



ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS



ALREADY USING



New question added in 2024

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

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APPENDIX





AWARENESS OF RENTING COMPANIES

In %

Passenger cars + LCVs



54 % AWARE OF AT LEAST ONE BRAND

1.5 Brands on average

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


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Thank you


Ipsos