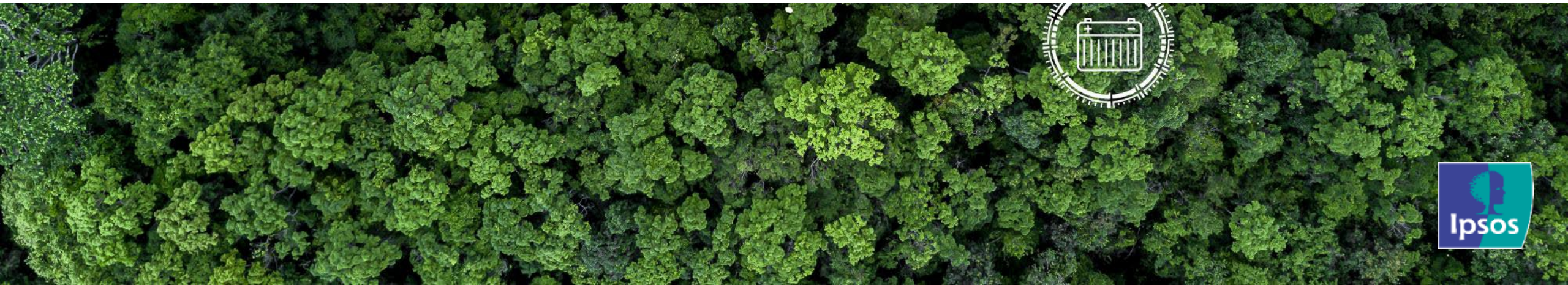
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MOBILITY AND FLEET BAROMETER 2024



Ipsos

2024 MOBILITY AND FLEET BAROMETER

01
Context and methodology p3

02
Executive summary p11

03
What are the main characteristics of the fleets? p17

04
How are companies financing their fleet? p47

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

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

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

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1

CONTEXT AND METHODOLOGY





KEY THEMES FOR ARVAL MOBILITY OBSERVATORY



— 1

WHAT SHORT TERM SHIFTS ARE SHAPING THE MARKET?



— 2

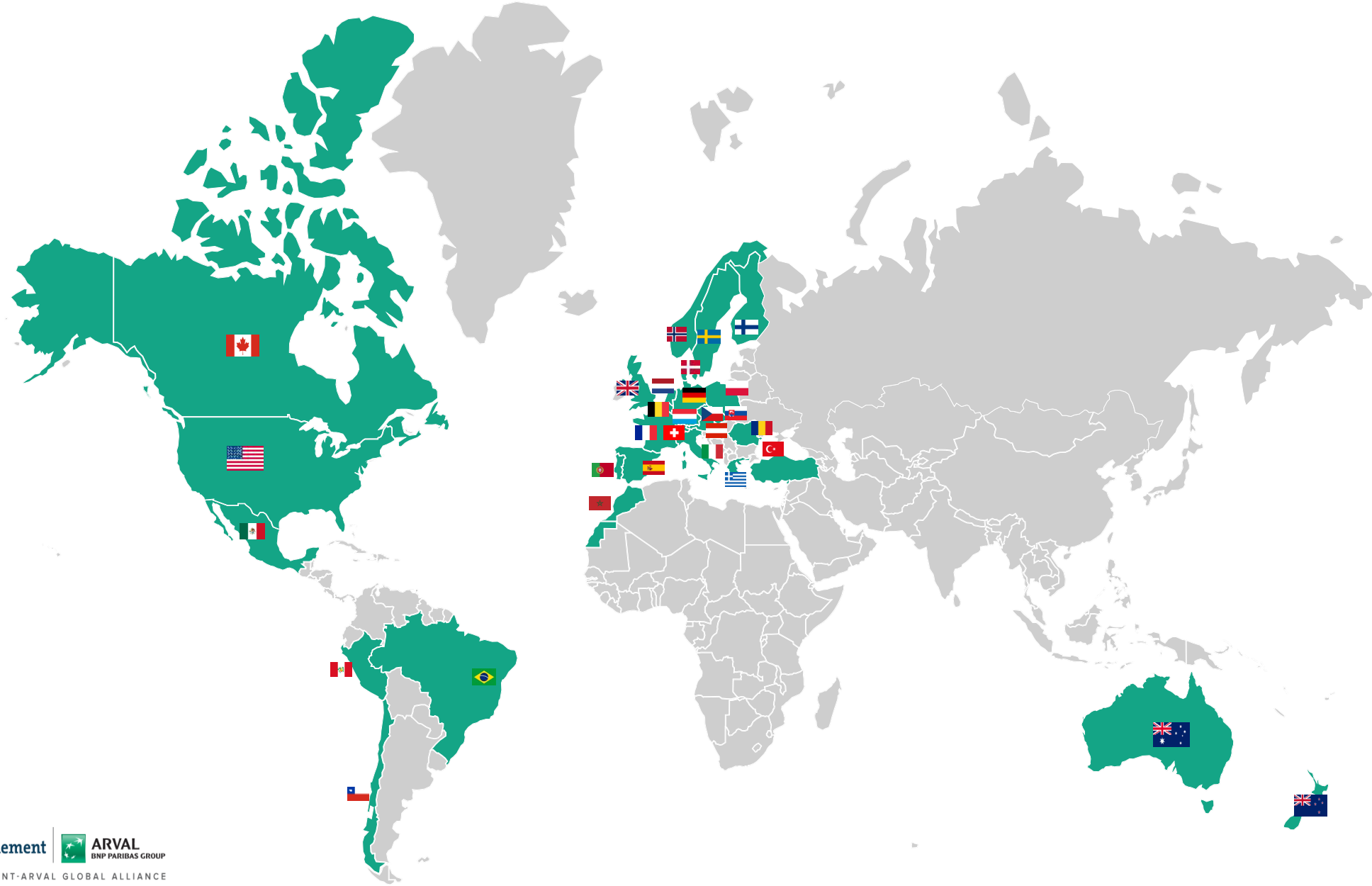
WHAT KIND OF VEHICLES WILL THE MARKET EXPECT IN 3 YEARS?



— 3

HOW DO MOBILITY SOLUTIONS IMPACT FLEET MANAGEMENT?

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 10	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 NEW ZEALAND

Perimeter of the survey: companies owning at least 1 vehicle

Companies with Less than 10 empl.
81 INTERVIEWS

Companies with 10 - 99 empl.
85 INTERVIEWS

Companies with 100 - 249 empl.
55 INTERVIEWS

Companies with 250 empl. or more
30 INTERVIEWS

1 to 99 employees
166 INTERVIEWS

100 employees and more
85 INTERVIEWS

SAMPLE STRUCTURE IN NEW ZEALAND

Company size & sector

In %

					TOTAL
Construction Building Construction General Contractors And Operative Builders / Heavy Construction Other Than Building Construction Contractors / Construction Special Trade Contractors	12	7	16	20	12
Industry Mining, oil & gas, Manufacturing (e.g. food, tobacco, textile, wood, furniture, printing, publishing, chemicals, fabricated metal products, electronic, machinery, etc…)	12	18	18	15	16
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	54	58	45	53	53
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	22	17	21	13	19
Weight of each company size segment	32	34	22	12	

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: COMPANIES ARE CONFIDENT ABOUT THE FUTURE OF THEIR FLEET

#1

WITH A STILL SOMEHOW LIMITED GROWTH POTENTIAL

- In New Zealand, **most fleet managers are optimistic regarding the future of their fleet size** overall. Almost all of them declare their fleet will remain stable or even increase. But **still, only 2 out of 10 say it will grow**, vs 3 out of 10 for the global average. The picture is quite the same for passenger cars and for LCV.
- **Business development is the main reason for the fleet growth expectations**, like on the global picture. HR related needs (talent recruitment, employee retainment) and offering vehicles to employees with no car eligibility follow, distanced.
- As for vehicles' renewals, **vehicles possession length is stable** (6,2 years) and above global average. Vehicles are renewed at a later stage in the largest companies – like for the global benchmark too.
- **Second-hand vehicles are used by 1 out of 2 companies** (above the global average), with a strong growth potential in the next 3 years. No difference whatever the company sizes are considered. These second-hand vehicles are mostly passenger cars, LCVs being less concerned – and pool cars or tool cars mainly.
- **Fleet management has been little impacted by the development of homeworking** overall. Less than 1 out of 5 companies has changed or considers changing its mobility policy to take it into account, mainly through a change in mileage or models or through developing alternative mobility solutions.
- To date, **almost 9 out of 10 companies have 2 fleet managers** and **1 out of 4 outsource services** in terms of fleet management.
- Mitigating the increase of total cost of ownership of the vehicles and implementing alternative fuel technologies to adapt to restrictive public policies on petrol and diesel vehicles are the **main challenges that fleet managers have to face** in new Zealand. They even reinforced since last year.

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INSIGHT 2: OUTRIGHT PURCHASE IS QUITE WIDESPREAD IN NEW ZEALAND

#2

OPERATING LEASING IS DISTANCED AND FACES LIMITED GROWTH POTENTIAL AND FEW UPSELL POSSIBILITIES

- The **main financing method used by fleet managers is still outright purchase** by far, ahead of credit and operating leasing. The picture is the same for passenger cars and for LCVs.
- To note an **increase in the growth potential of operating leasing**
- **Fleet managers show a limited interest in fleet management services** – 2 out of 3 fleet managers being not interested in any. Telematics appears to be the one with the lowest interest level, distanced by all other type of services (fuel management, re-lease, online reporting, midterm rental, eco/safety training) – all generating little interest too anyhow.
- Additional external supplier advice or consulting expertise (on how to optimize costs and process or other fleet management related issues) shows very limited potential too.

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INSIGHT 3: PHEV LEADS IN A MARKET WHERE ALTERNATIVE FUEL TECHS ADOPTION IS DRIVEN BY LARGE COMPANIES AND FOCUSED ON PASSENGER CARS

#3

100% BEV ADOPTION FOR LCVS FACES PRICE AND CHARGING ISSUES

- **Electric vehicles have been included in car policies by 1 out of 3 companies**, driven by the >250-employee companies more specifically. Overall, **half of the companies have implemented at least one alternative fuel technology** (among HEV, PHEV or 100% BEV), rather in line with the global average. A total of 8 out of 10 are using or consider using them in the next 3 years.
- To date, **the alternative used most to date for passenger cars is PHEV**, quite ahead of HEV and 100% BEV. To note though, growth **potentials of all these three technologies are similar and all above global averages**. Their **implementation is strongly driven by the >100-employee companies**, especially regarding PHEV.
- The adoption of alternative fuel technologies in New Zealand is **driven by the lower environmental impact, the reduction in fuel expenses and the improvement in the companies' image** – in line with the global ranking.
- **The adoption of 100% BEV and Fuel Cell for LCVs is almost non-existent to date**. Still, their growth potential is in line with the global picture, driven by their lower environmental impact and by the reduction in the fuel expenses, like passenger cars.
- The **main barriers to the adoption of 100% BEV, whether for passenger cars or for LCVs are the higher purchase price and the too few public charging points**. Furthermore, 1 out of 2 companies have no charging points at their premises. To note though, two thirds of the ones using or considering 100% BEV are also considering setting up charging points at their premises.
- **A very large and reinforced majority of the fleets is expected to be ICE motorized** in the next 3 years, whether for passenger cars or for LCVs.
- Lastly, **4 out of 10 companies are eligible to an ESG regulatory public reporting** to date, and 4 more will be eligible in the next 2 years. Employees mobility is of high importance in this perspective for 1 out of 3 companies among them.

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INSIGHT 4: A REINFORCED ADOPTION POTENTIAL OF MOBILITY SOLUTIONS

#4

SHORT OR MID-TERM RENTAL VEHICLES AND CAR/CASH ALLOWANCE SHOULD KEEP THE LEAD

- **6 out of 10 companies have implemented at least one mobility solution** to date, stable and below the global average. **Growth potential has risen** vs last year though.
- **Short or mid-term rental vehicles and car/cash allowance come as the mobility solutions adopted the most**. They are also the ones **showing the strongest adoption potentials** in the next 3 years. Other solutions are all more marginal. All being mostly considered as add-ons to the corporate vehicles fleets, which remain essential business transport tools for most companies.
- Like in the global picture, **HR related needs (talent recruitment, employees retainment) are the main driver** of the adoption of mobility solutions. Answering specific requests of some employees, compliance with CSR policies, improvement in the companies' image and anticipation of upcoming regulations are also at stake but to a more limited extent.
- **Private cars are the main mean to commute to work** by far. And half of companies have policies in place for cars that are owned by employees but used on business.

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INSIGHT 5: CONNECTED VEHICLES USAGE IS STILL SOMEHOW LIMITED

#5

DATA USAGE IS IN LINE WITH THE GLOBAL PICTURE

- **Connected vehicles are used by 3 out of 10 companies**, below the global average.
- **6 out of 10 companies are already using or consider using the data coming from the vehicle box thanks to a telematics platform** in the next 3 years. 1 out of 5 companies is currently using the data. This is in line with the global picture.
- The picture is quite the same for passenger cars and for LCVs.

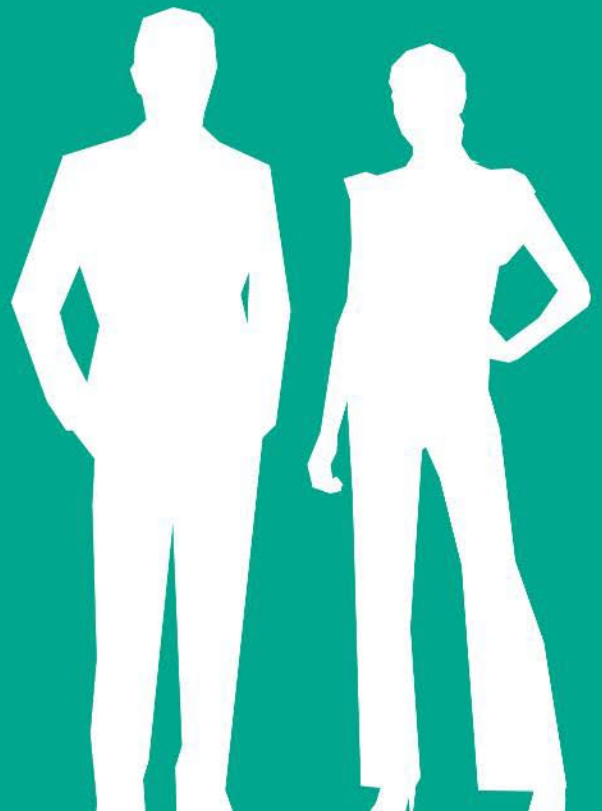
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3

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





COMPANIES ARE CONFIDENT ABOUT THE FUTURE OF THEIR FLEET – WITH A STILL SOMEHOW LIMITED GROWTH POTENTIAL

1

In New Zealand, **fleet managers are positive regarding the future of their fleet size overall**. Almost all of them (95%) declare their fleet will remain stable or even increase. But **still, only 2 out of 10 say it will grow**, vs 3 out of 10 for the global average. The picture is quite the same for passenger cars and for LCV.

The main **reasons for the fleet growth expectations are related to business development** (76%), like on the global picture. HR related needs (talent recruitment, employees retainment) and offering vehicles to employees with no car eligibility follow, distanced.

2

Vehicles possession length is stable (6,2 years) and above global average (5,5 years). Vehicles are renewed at a later stage in the largest companies (6,8 years) – like for the global benchmark too (5,6 years).

3

1 out of 2 companies use second-hand vehicles (11 pts above the 43% global average), with a strong growth potential in the next 3 years (94%). No difference whatever the companies sizes are considered. These second-hand vehicles are mostly passenger cars (49%), LCVs being less concerned (15%) – and pool cars or tool cars mainly.

4

Development of homeworking has a limited impact. Less than 1 out of 5 companies has changed or considers changing its mobility policy to take it into account, mainly through a change in mileage or models or through developing alternative mobility solutions.

To date, almost **9 out of 10 companies have 2 fleet managers and 1 out of 4 outsource services** in terms of fleet management.

Mitigating the increase of total cost of ownership of the vehicles and implementing alternative fuel technologies in order to adapt to restrictive public policies on petrol and diesel vehicles are the main challenges that fleet managers have to face in new Zealand. They even reinforced since last year.

FLEET PROFILE



MOBILITY POLICY ADAPTATION COINCIDING WITH HOMEWORKING

14% changed the policy or consider changing

16%

FLEET POSSESSION LENGTH

6.2 years

5.5 years 5.6



ANTICIPATED FLEET EVOLUTION

(% will increase or remain stable)

95%

91%

RESPONDENTS POSITION WITHIN THE COMPANY

In %

Passenger cars + LCVs







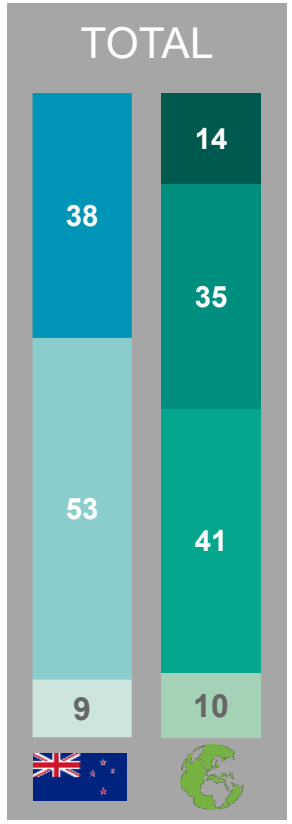
CEO / Managing director	35	27
Fleet director / manager	20	18
Procurement director / manager	3	12
Finance director / officer / manager / CFO	9	11
HR director/ manager	11	9
COO (Chief Operations Officer)	6	8
CSR director / officer / manager	8	6
Facility manager	6	5
Mobility manager	0	3
Other, please specify	2	2

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

NUMBER OF VEHICLES IN FLEET

In %

Passenger cars + LCVs





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

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

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

(among companies with at least one vehicle in fleet)

In %

		TOTAL	1	2	3	4+
PASSENGER CARS		99	96	100	100	100
		98	97	98	100	100
VANS OR LCVs		98	96	97	100	100
		99	98	97	99	99

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

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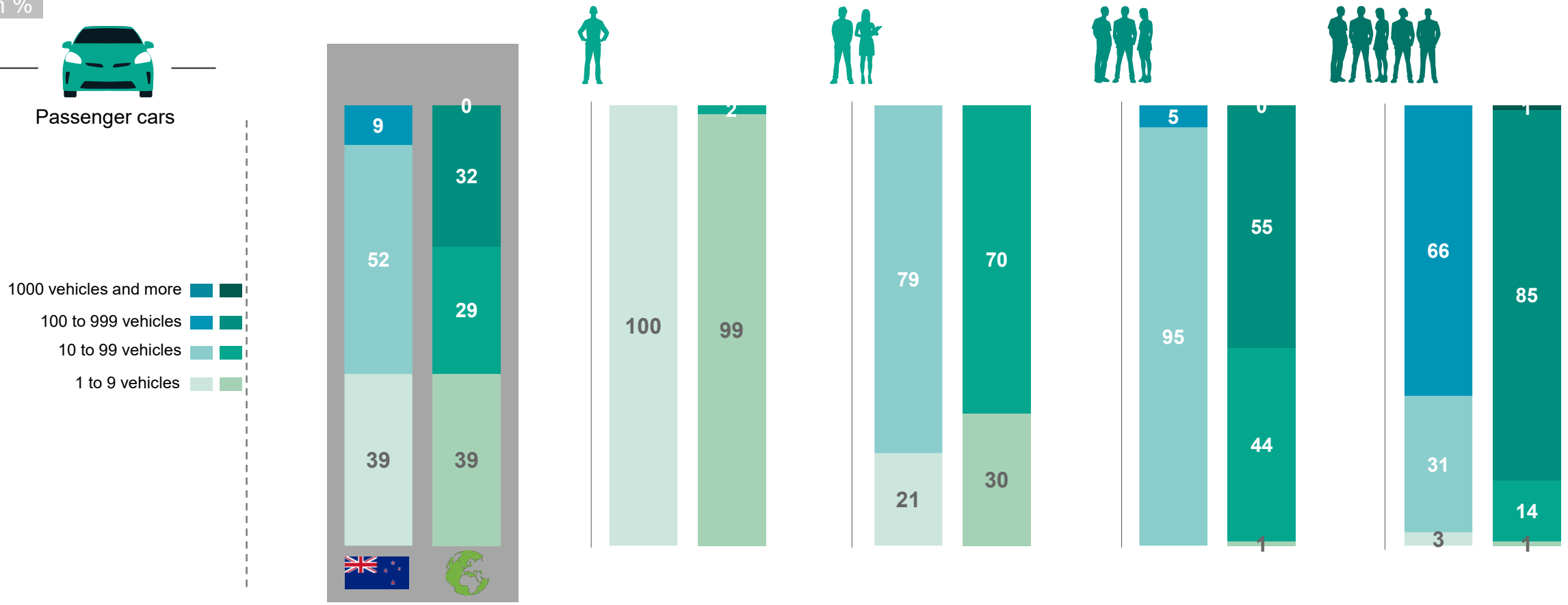
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NUMBER OF PASSENGER CARS IN FLEET

In %

Passenger cars



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

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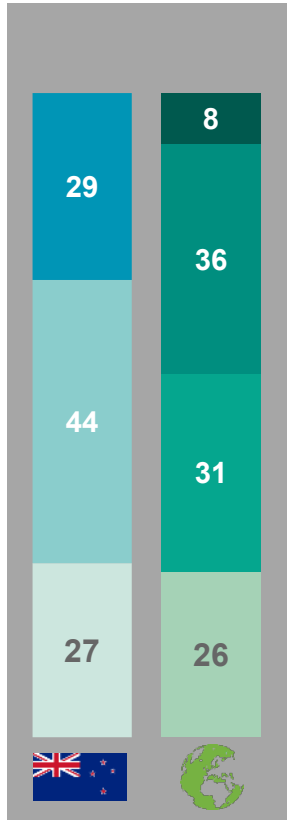
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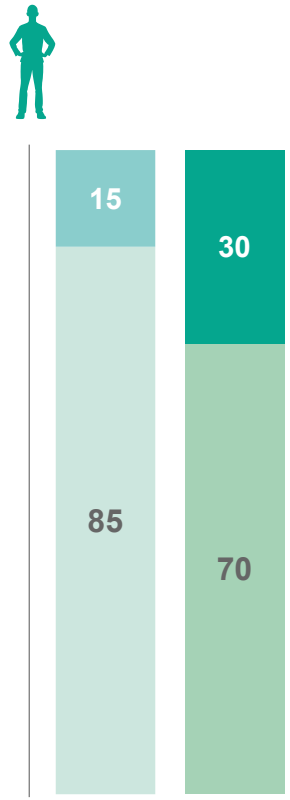
NUMBER OF LCVS IN FLEET

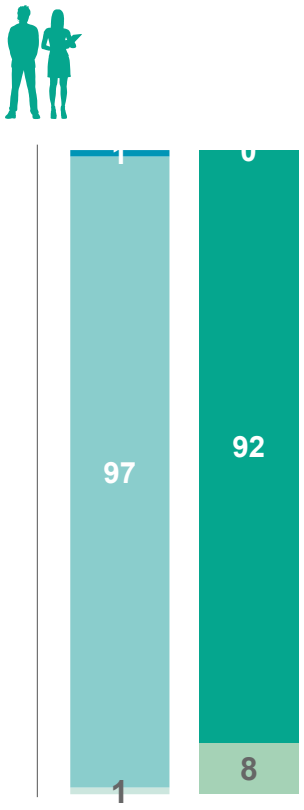
In %

LCVs

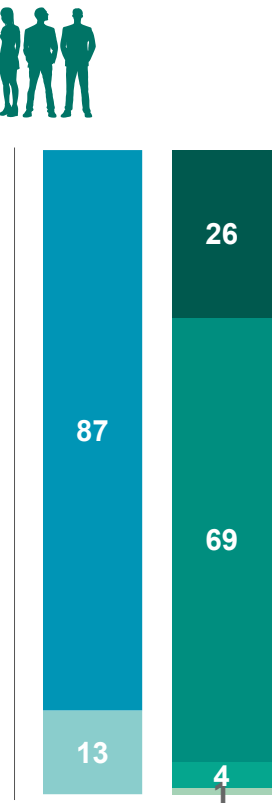
1000 vehicles and more
100 to 999 vehicles
10 to 99 vehicles
1 to 9 vehicles











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

VEHICLES POSSESSION LENGTH



Passenger cars + LCVs

AVERAGE IN YEARS





	TOTAL				
	6.2	5.9	6.5	6.1	6.8
	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



Passenger cars

AVERAGE IN YEARS

	TOTAL				
	6.1	5.8	6.3	6.1	6.3
	5.4 (5.7)	5.3 (5.6)	5.4 (5.8)	5.3 (5.7)	5.5

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

LCVS POSSESSION LENGTH



LCVs

AVERAGE IN YEARS

	TOTAL	1	2	3	4
	6.4 *8.8*	6 *9.4*	6.7 *8.1*	6.1 *9.9*	6.9
	5.7 *5.9*	5.7 *5.9*	5.8	5.7 *5.9*	5.8

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

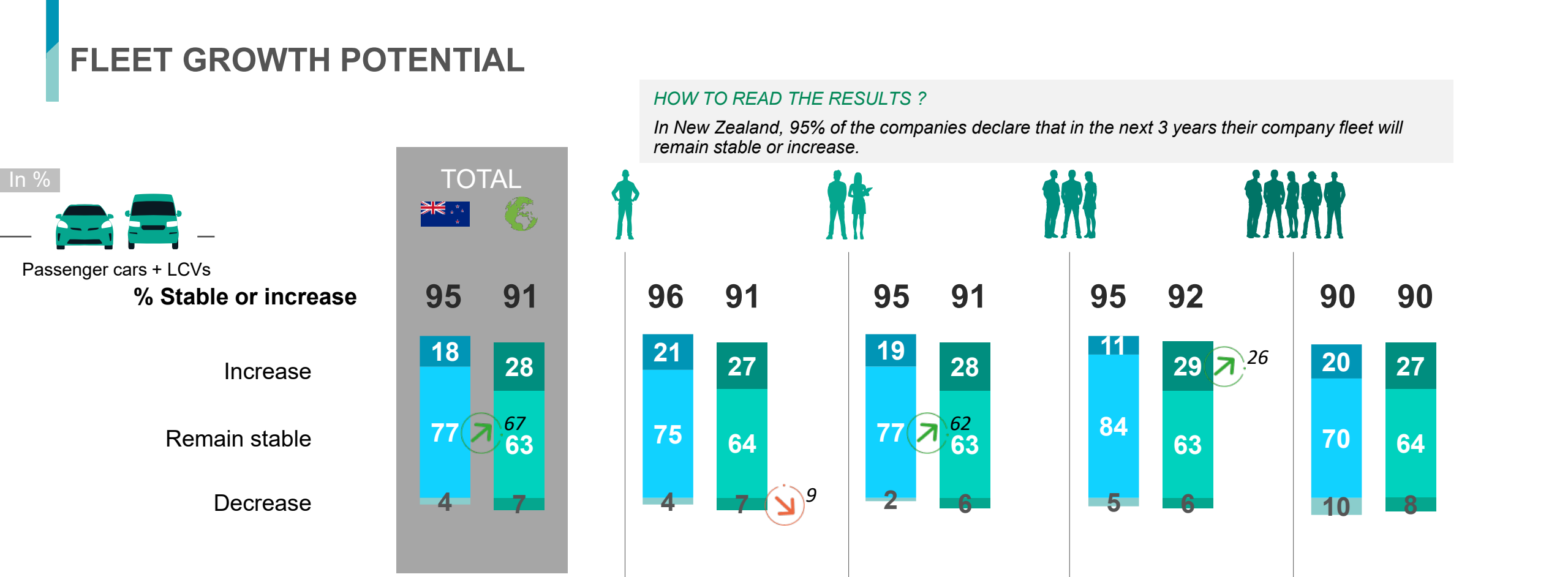
FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In New Zealand, 95% of the companies declare that in the next 3 years their company fleet will remain stable or increase.

In %

Passenger cars + LCVs



BALANCE in pts (INCREASE ⊖ DECREASE)

	TOTAL									
2024	+13	+21	+17	+20	+16	+21	+6	+23	+10	+19
2023	+16	+20	+17	+19	+19	+22	+7	+19	+17	+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 New Zealand, 95% of the companies declare that in the next 3 years their company fleet will remain stable or increase.

In %

Passenger cars + LCVs















	AT	CH	DE	ES	FR	GR	IT	PT	UK	BE	LU	NL	CZ	PL	SK	RO	DK	FI	NO	SE	MA	TR	BR	CL	PE	US	CA	MX	AU	NZ	91	91	6	7
% Stable or increase	92	92	89	92	92	93	93	93	93	91	92	88	86	92	90	88	86	94	93	96	91	94	87	78	95	93	92	91	90	95				
Increase	21	21	20	25	30	42	18	16	38	23	21	27	22	29	19	27	19	27	20	19	50	40	28	28	54	35	33	36	23	18				
Remain stable	70	72	69	67	62	51	75	78	56	68	71	61	64	63	71	61	67	67	73	77	41	55	59	50	41	58	59	55	67	77				
Decrease	5	5	10	5	7	5	5	6	5	8	4	5	12	6	8	8	12	4	6	2	6	4	8	20	2	7	8	8	9	4				
2024	+17	+15	+10	+20	+22	+37	+13	+10	+33	+15	+17	+22	+10	+23	+11	+20	+7	+24	+14	+16	+44	+36	+21	+9	+52	+28	+25	+28	+15	+13	+21	+18		
2023	+17	+11	+13	+14	+21	+34	+19	+9	+24	+14	+15	+15	+9	+24	+7	+22	+8	+22	+12	+12	+46	+34	+21	+26	+44	+23	+24	+30	+11	+16	+20	+16		
2022	+18	+13	+18	+16	+24	+24	+18	+22	+27	+13	+19	+23	+7	+22	+13	+23	+10	+21	+11	+14	+33	+14	+19	+24	+49	-	-	-	-	-	+20	+18		

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

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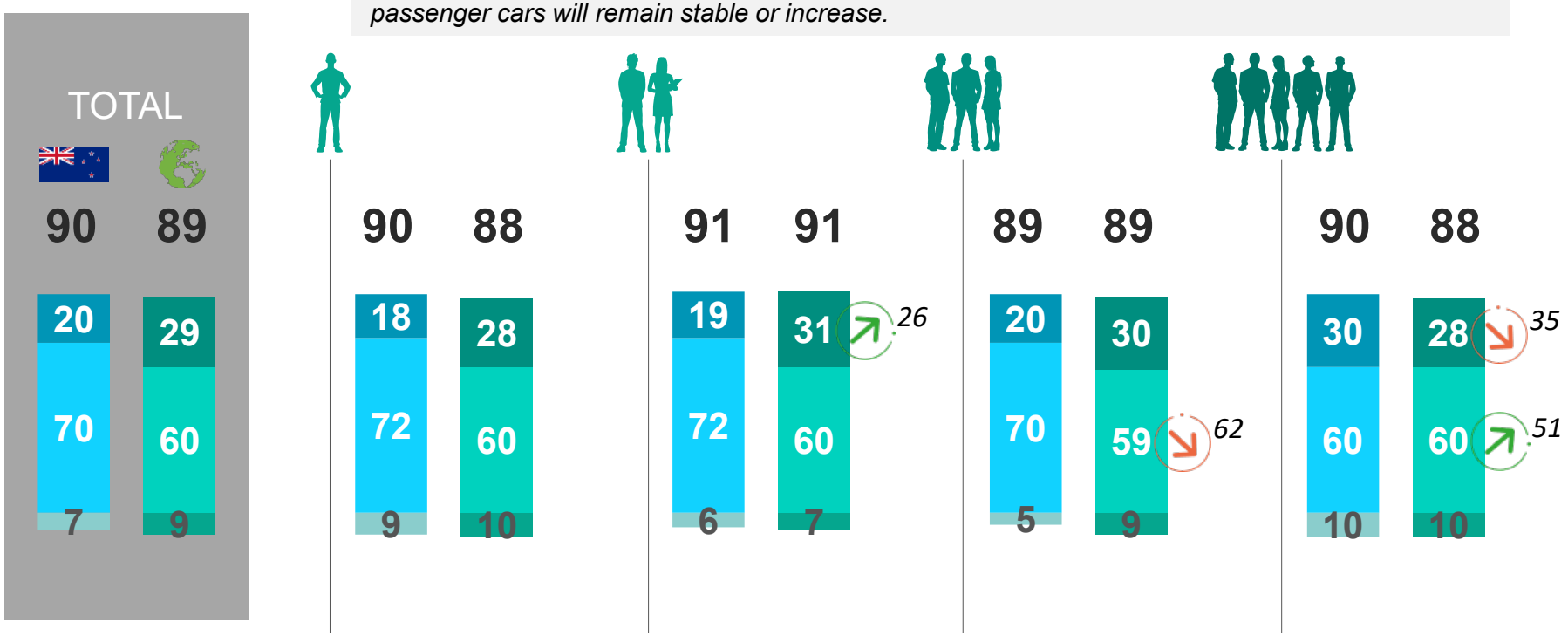
PASSENGER CAR FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In New Zealand, 90% 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)

	TOTAL									
2024	+13	+20	+9	+19	+13	+24	+14	+21	+20	+18
2023	+15	+20	+15	+19	+23	+18	+7	+19	+13	+24

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

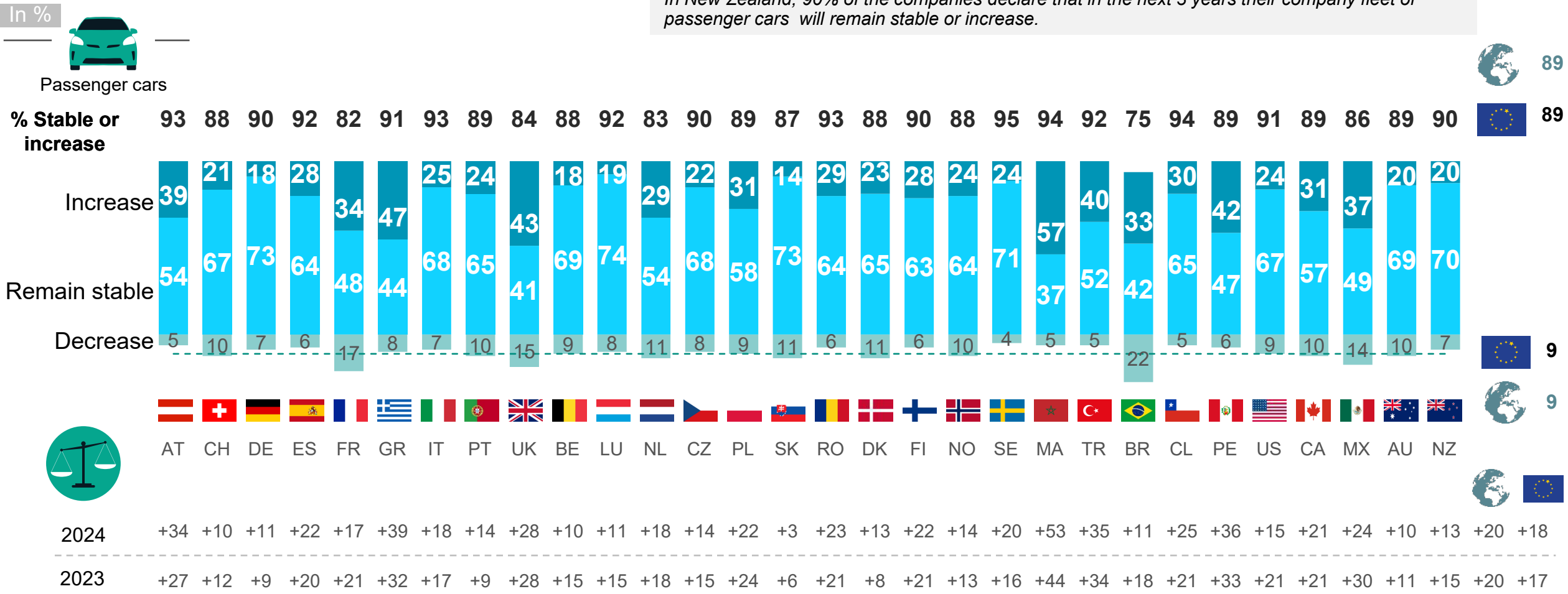
PASSENGER CAR FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In New Zealand, 90% 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

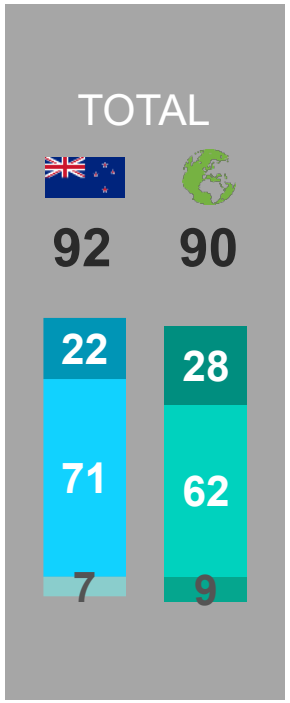
HOW TO READ THE RESULTS ?

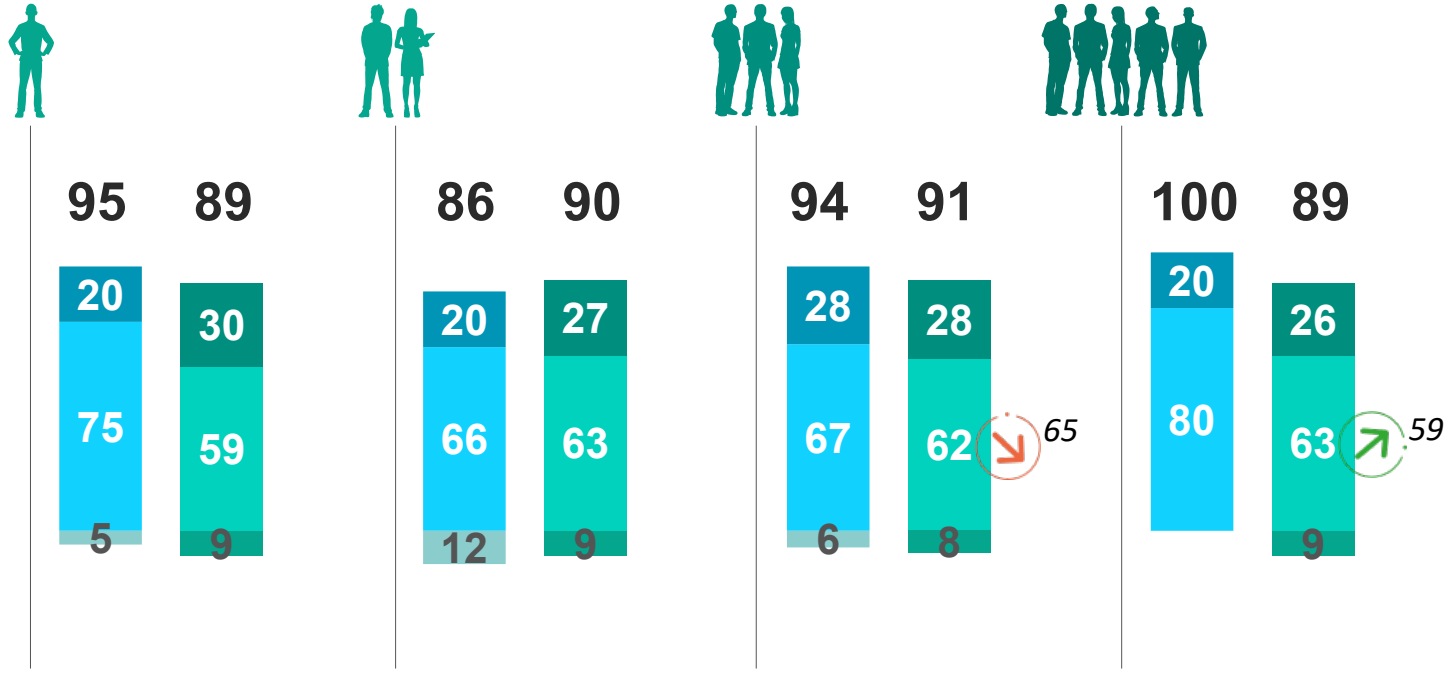
In New Zealand, 92% of the companies declare that in the next 3 years the total number of LCVs will remain stable or increase.

In %



LCVs





% Stable or increase

Increase

Remain stable

Decrease

BALANCE in pts (INCREASE ⊖ DECREASE)

	TOTAL									
2024	+15	+19	+15	+20	+8	+18	+22	+20	+20	+17
2023	+18	+19	+17	+21	+24	+18	+13	+19	+13	+20

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

Basis: companies with LCVS

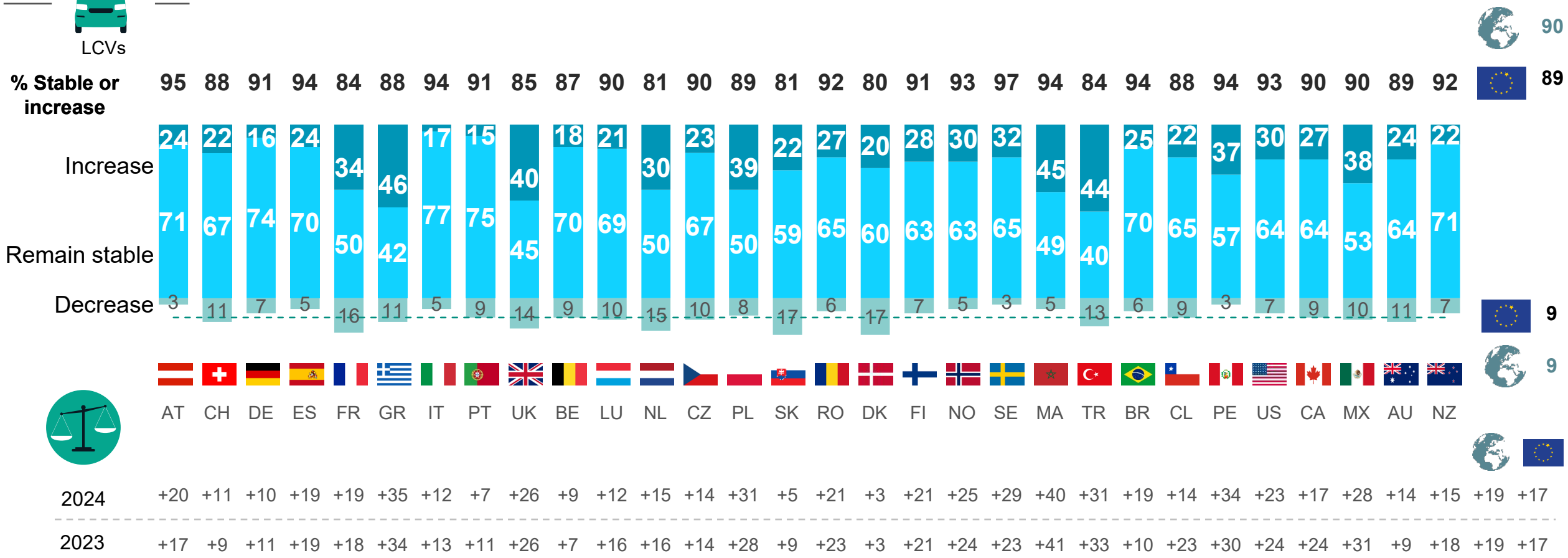
LCVS FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

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

In %

LCVs



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

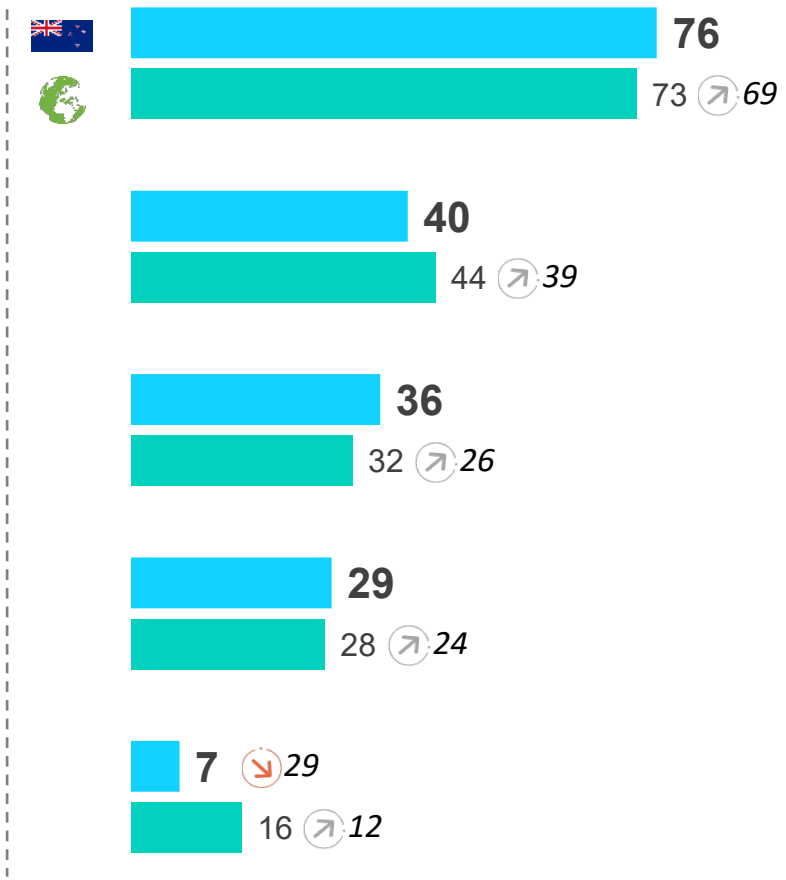
Basis: companies with LCVS

REASON FOR FUTURE FLEET INCREASE

In %

Passenger cars + LCVs





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

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 ?

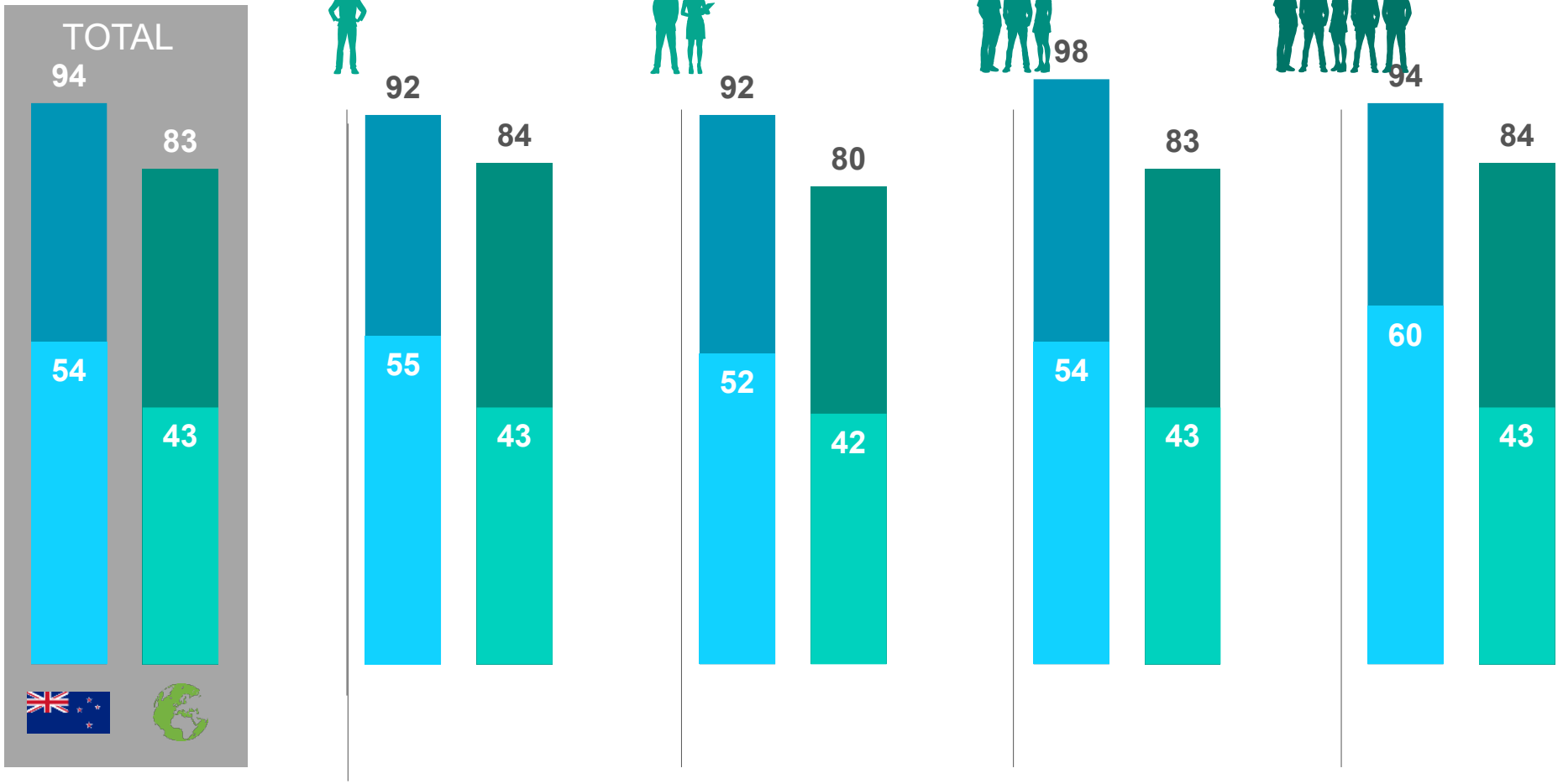
In New Zealand, 94% of the companies are already using or consider to use second-hand vehicles in the next 3 years. 54% of the companies are currently using some.

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%

Arval Mobility Observatory

element | ARVAL BNP PARIBAS GROUP

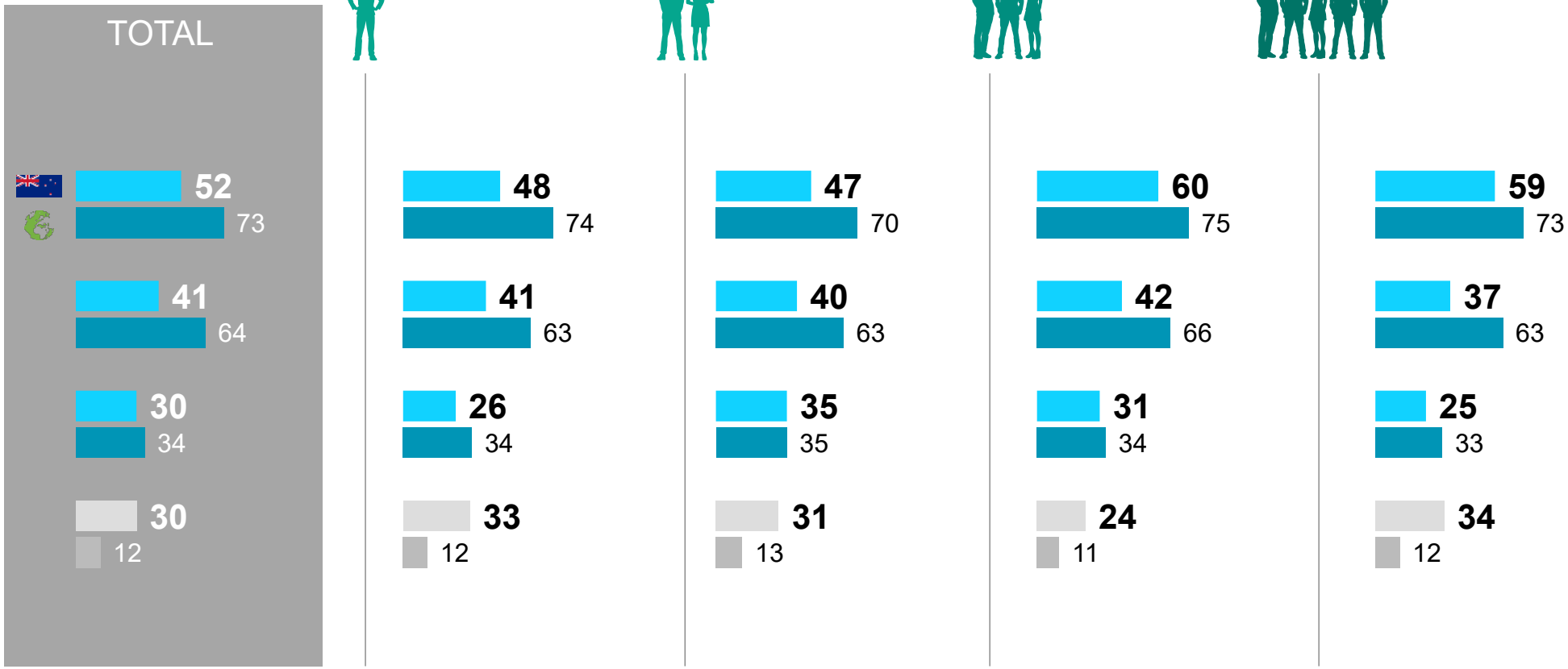
ELEMENT-ARVAL GLOBAL ALLIANCE

TYPE OF USE OF USED / SECOND-HAND PASSENGER CARS

In %



Passenger cars



New question added in 2024

If you have used/second-hand passenger cars in your fleet or you consider having some in the next three years. For which type(s) of use?

Basis: companies with second-hand passenger cars

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

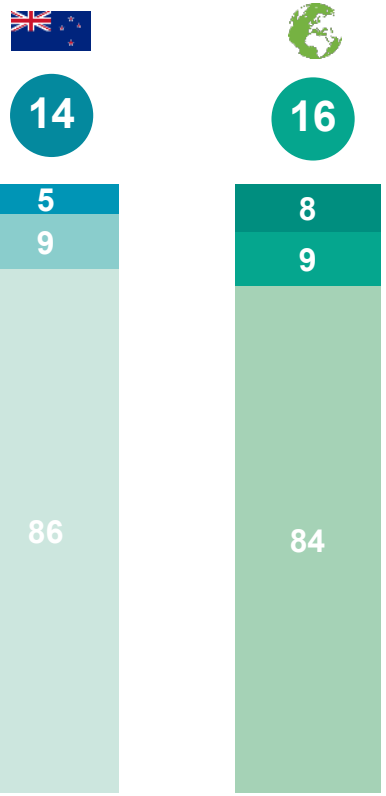
MOBILITY POLICY ADAPTATION COINCIDING WITH HOMEWORKING

HOW TO READ THE RESULTS ?

In New Zealand, among the companies that changed or consider changing their mobility policy, 10% have already reduced the total number of the vehicles in the company's fleet.

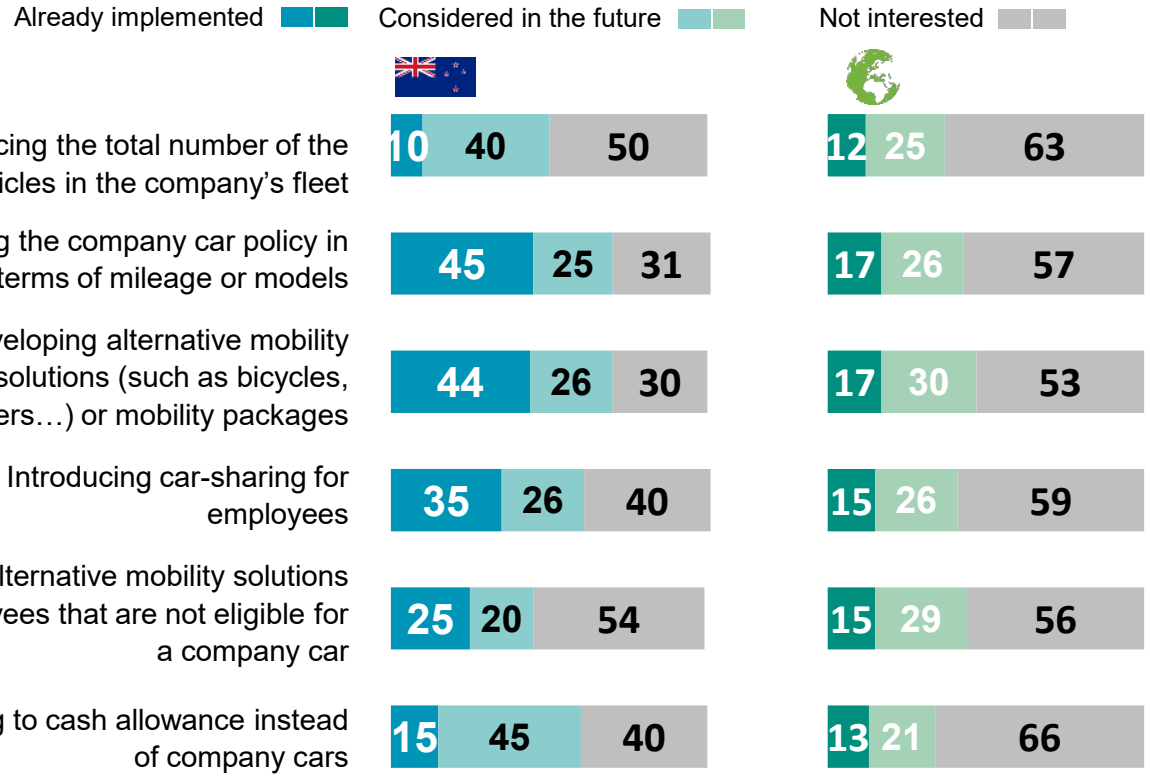
In %

Passenger cars + LCVs



NET CHANGED THE POLICY OR CONSIDER CHANGING

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



Basis: companies with corporate vehicles = 100%

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

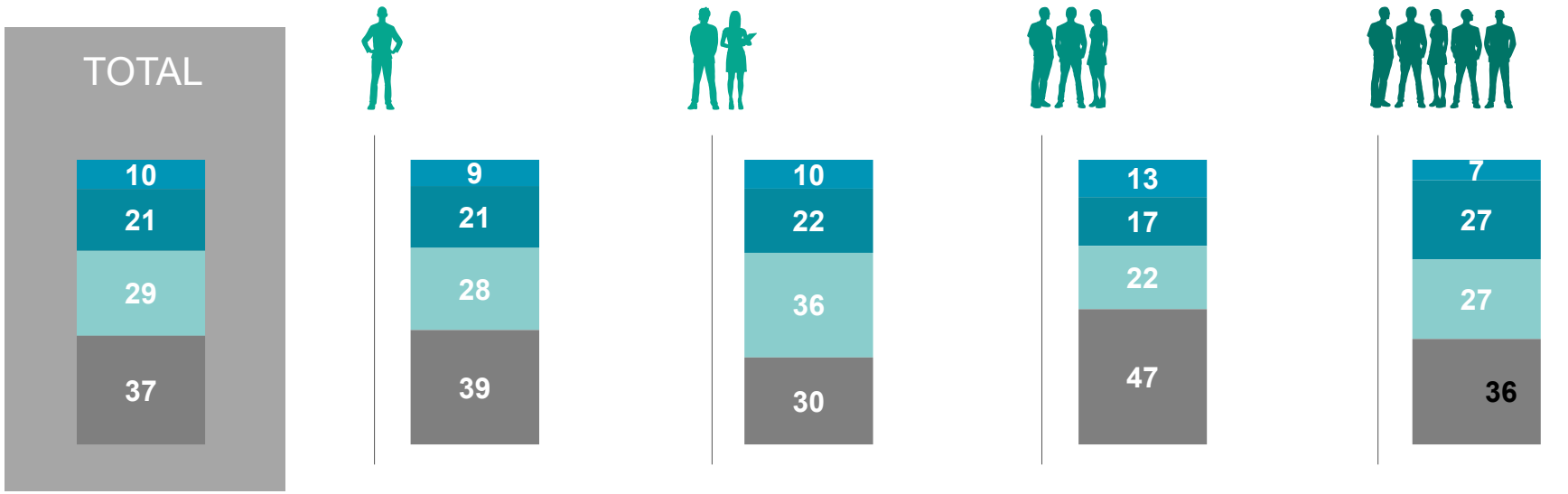
With regards to the development of homeworking, have you changed, or do you consider changing your mobility/fleet policy?
And among the following changes, can you please select those you have implemented or consider implementing with regards to the development of homeworking?

Question asked to respondents that are aware of mobility solutions

HOMEWORKING EVOLUTION SINCE COVID CRISIS

In %

Passenger cars + LCVs



Expected decrease of kms for the car drivers

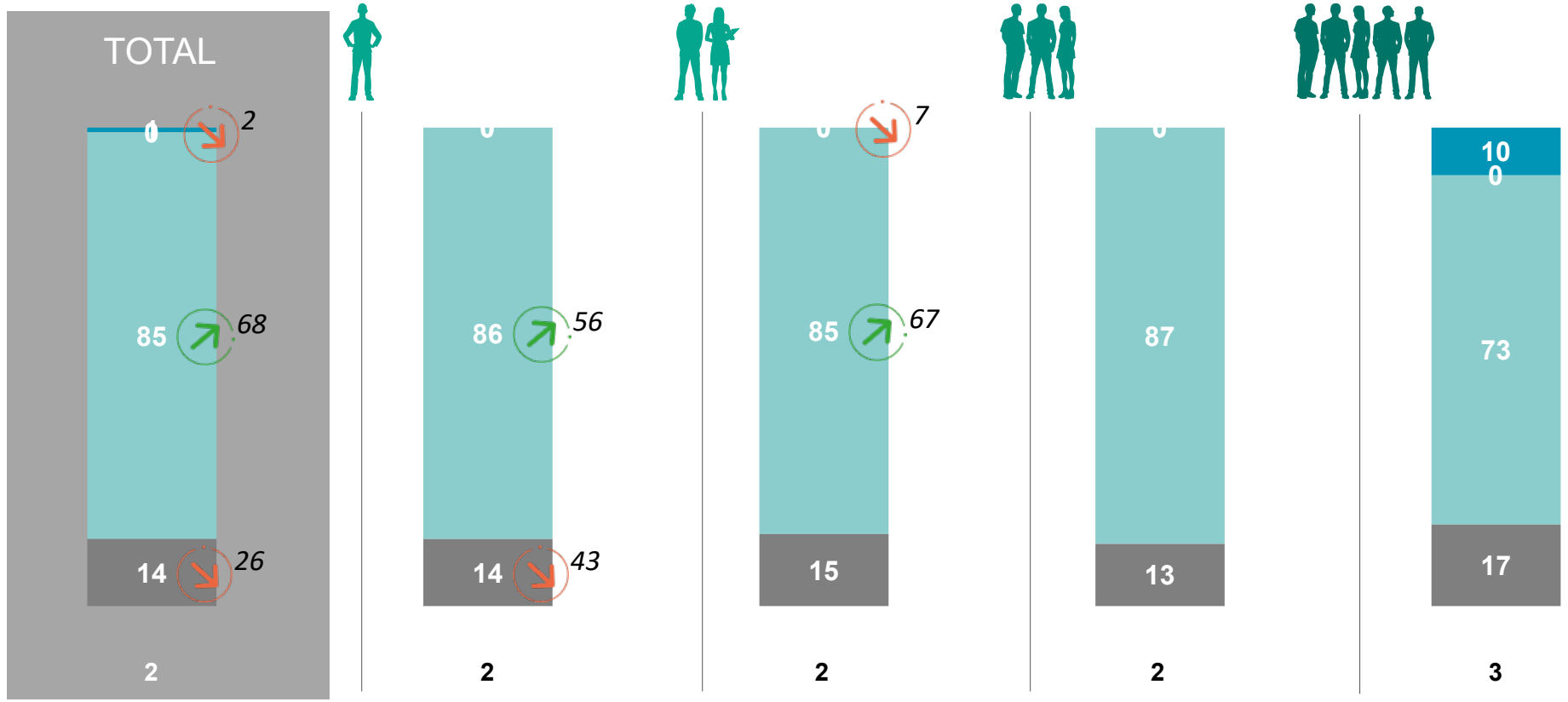
12% **11%** **11%** **12%** **15%**

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

NUMBER OF FLEET MANAGERS IN THE COMPANY

In %

Passenger cars + LCVs

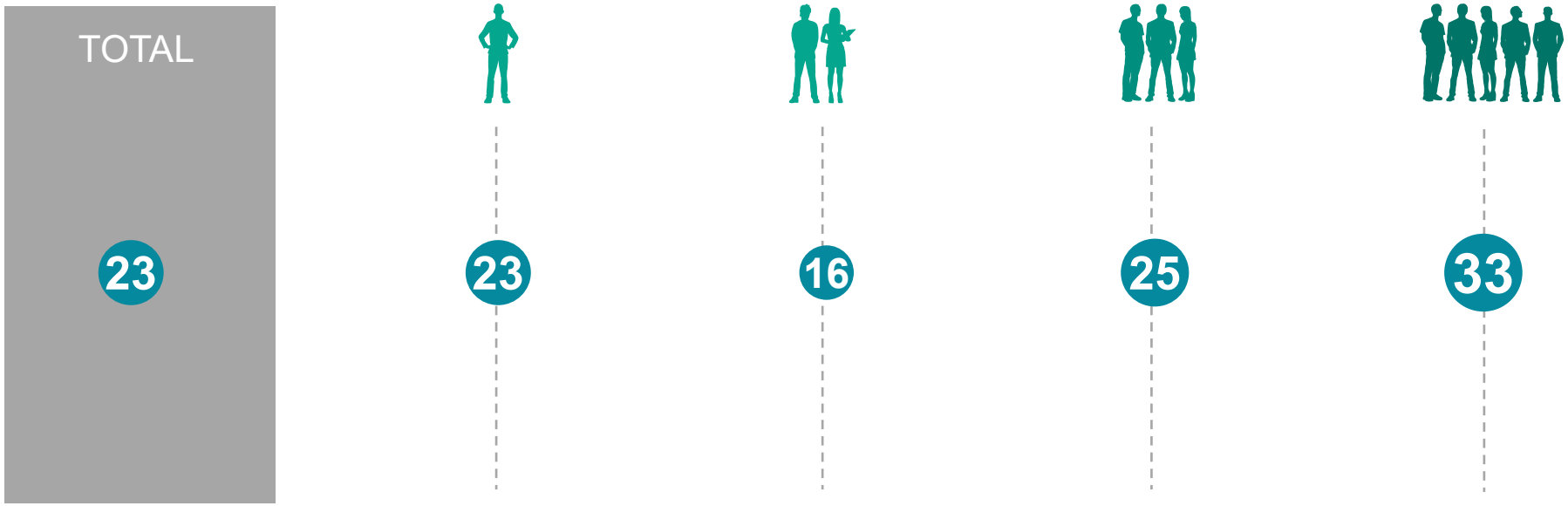


How many people are managing fleet vehicles in your company? We don't speak here about equivalence Full Time Employees but about number of employees.
Basis: companies with corporate vehicles = 100%

OUTSOURCE OF SERVICES IN TERMS OF FLEET MANAGEMENT

In %

Passenger cars + LCVs



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

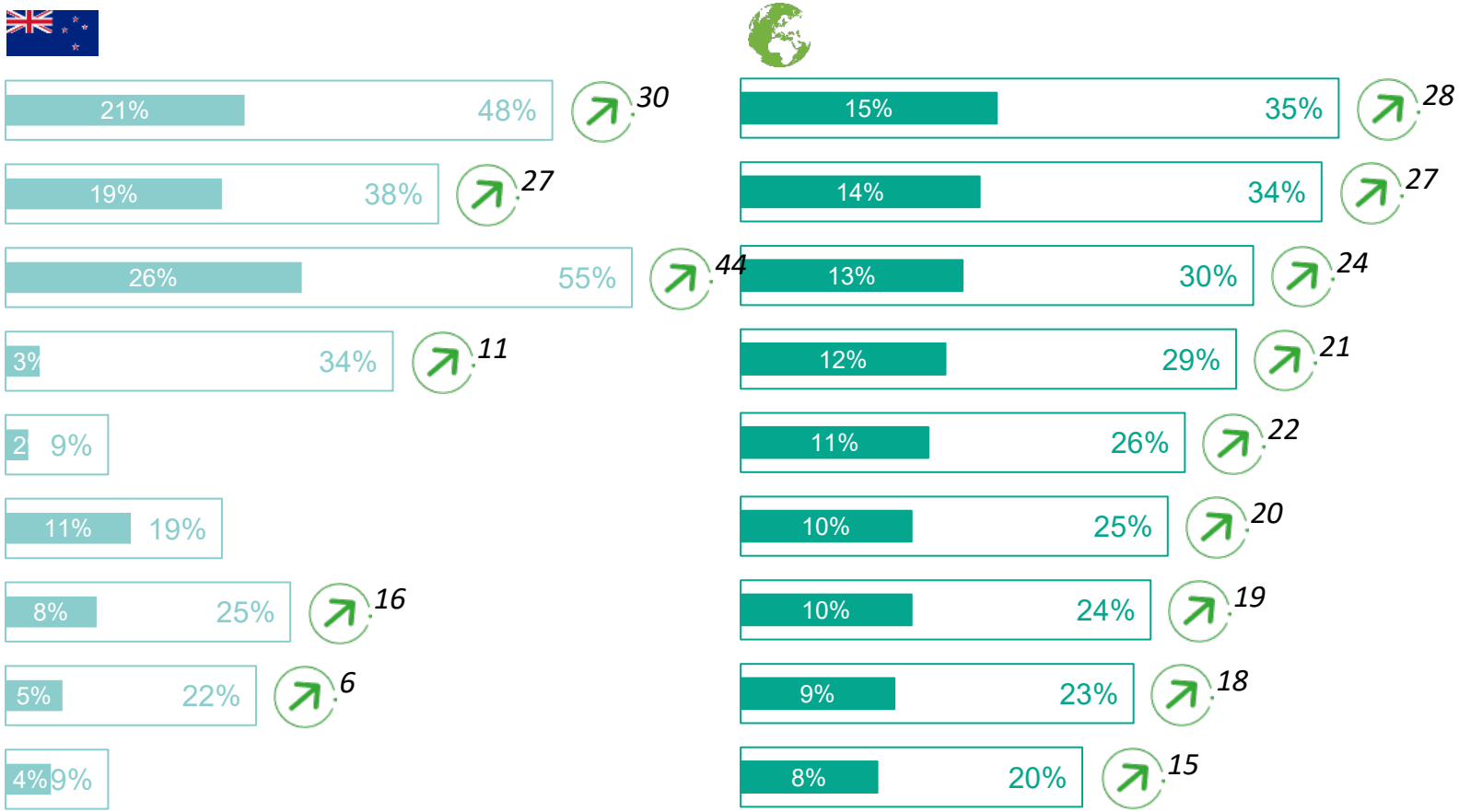
MOST IMPORTANT CHALLENGES EXPECTED

In %

Passenger cars + LCVs

Nb 1 challenge

Top 3 challenges



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?





OUTRIGHT PURCHASE IS QUITE WIDESPREAD IN NEW ZEALAND, OPERATING LEASING IS DISTANCED AND FACES LIMITED GROWTH POTENTIAL AND FEW UPSELL POSSIBILITIES

1. **Outright purchase is still the main financing method by far** (40%), ahead of credit (20%) and operating leasing (17%). The picture is the same for passenger cars and for LCVs.

2. **Operating leasing growth potential (26%) has increased (+4 pts).**

3. The **interest in fleet management services is limited** – 2 out of 3 fleet managers being not interested in any. Telematics appears to be the one with the lowest interest level (5%), distanced by all other type of services (fuel management, re-lease, online reporting, midterm rental, eco/safety training) – all generating little interest too anyhow.

   Additional external supplier advice or consulting expertise (on how to optimize costs and process or other fleet management related issues) shows very limited potential too.

FINANCING



OUTRIGHT PURCHASE

40%





CREDIT

20%





OPERATING LEASING

17%





FINANCIAL LEASING

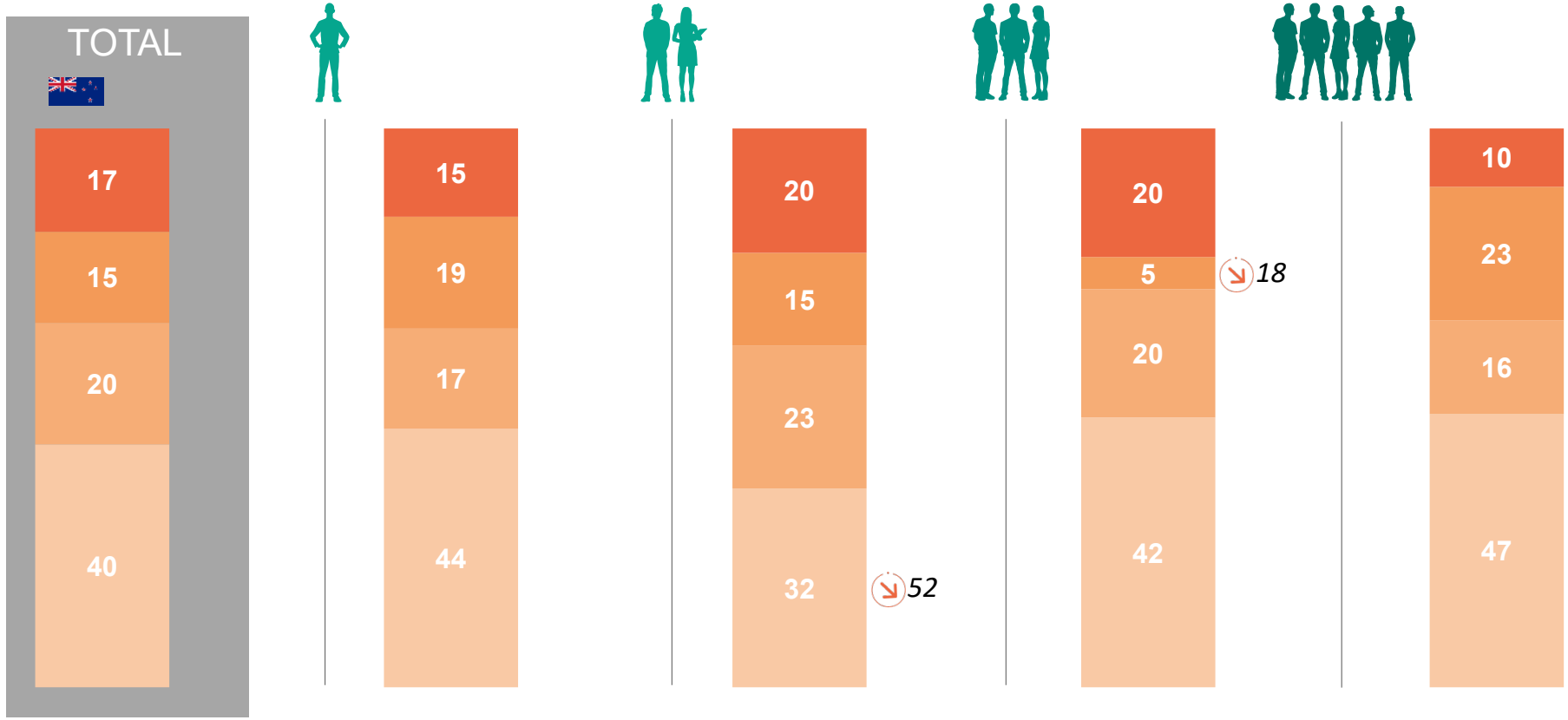
15%



MAIN FLEET FINANCING METHOD

In %

Passenger cars + LCVs



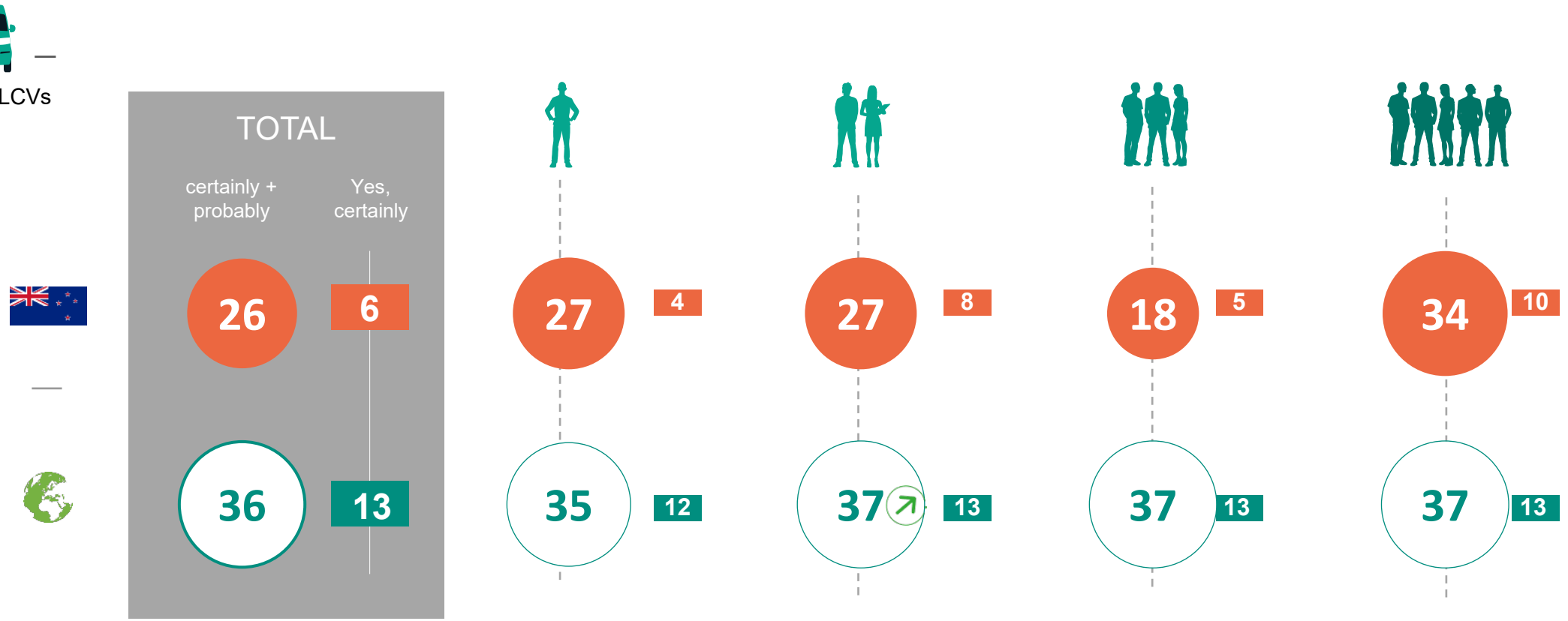
What is the main financing method used to finance your company vehicles today?
Basis: companies with corporate vehicles = 100%

INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATING LEASING

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

In %

Passenger cars + LCVs



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 + LCVs

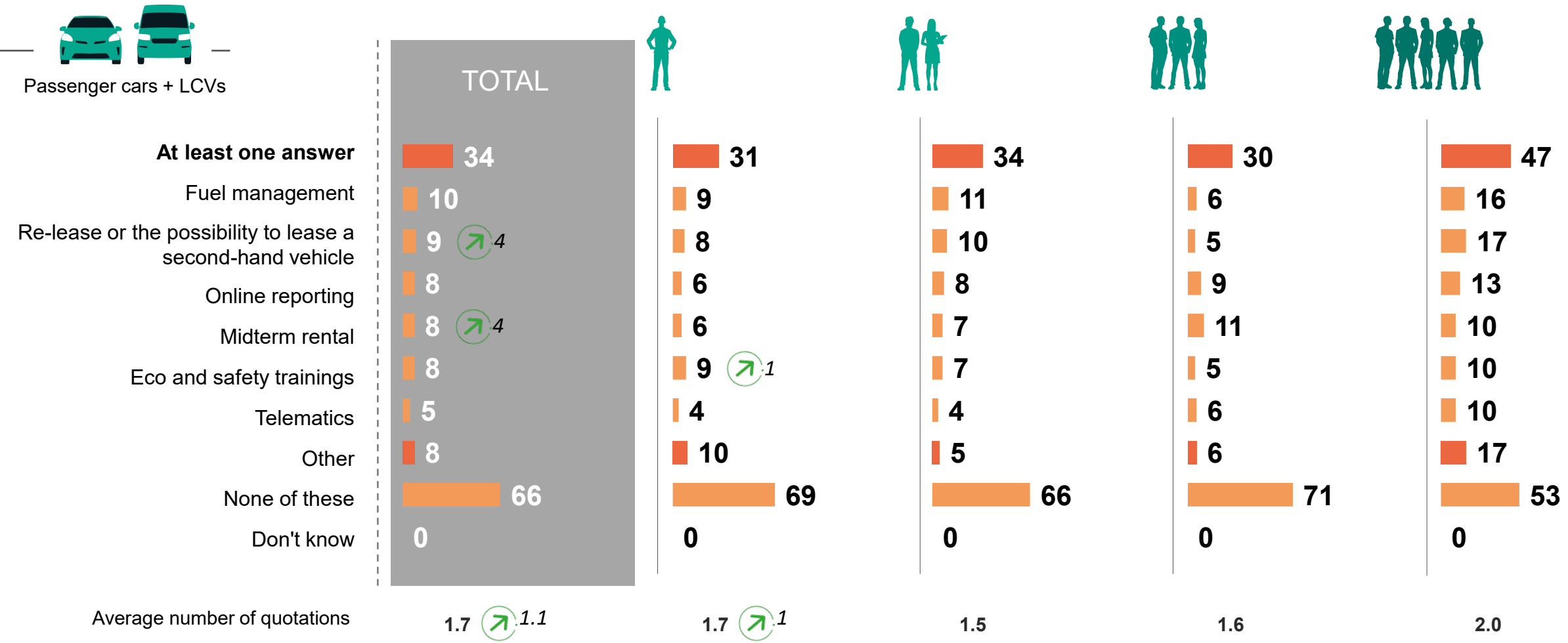
	TOTAL									
	Total certainly + probably	Yes, certainly								
2024	26	6	27	4	27	8	18	5	34	10
2023	22	6	25	10	17	2	24	6	23	3
2024	36	13	35	12	37	13	37	13	37	13
2023	35	12	34	12	32	12	37	12	37	14

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%

ADDITIONAL FLEET MANAGEMENT SERVICES CONSIDERED

In %

Passenger cars + LCVs



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

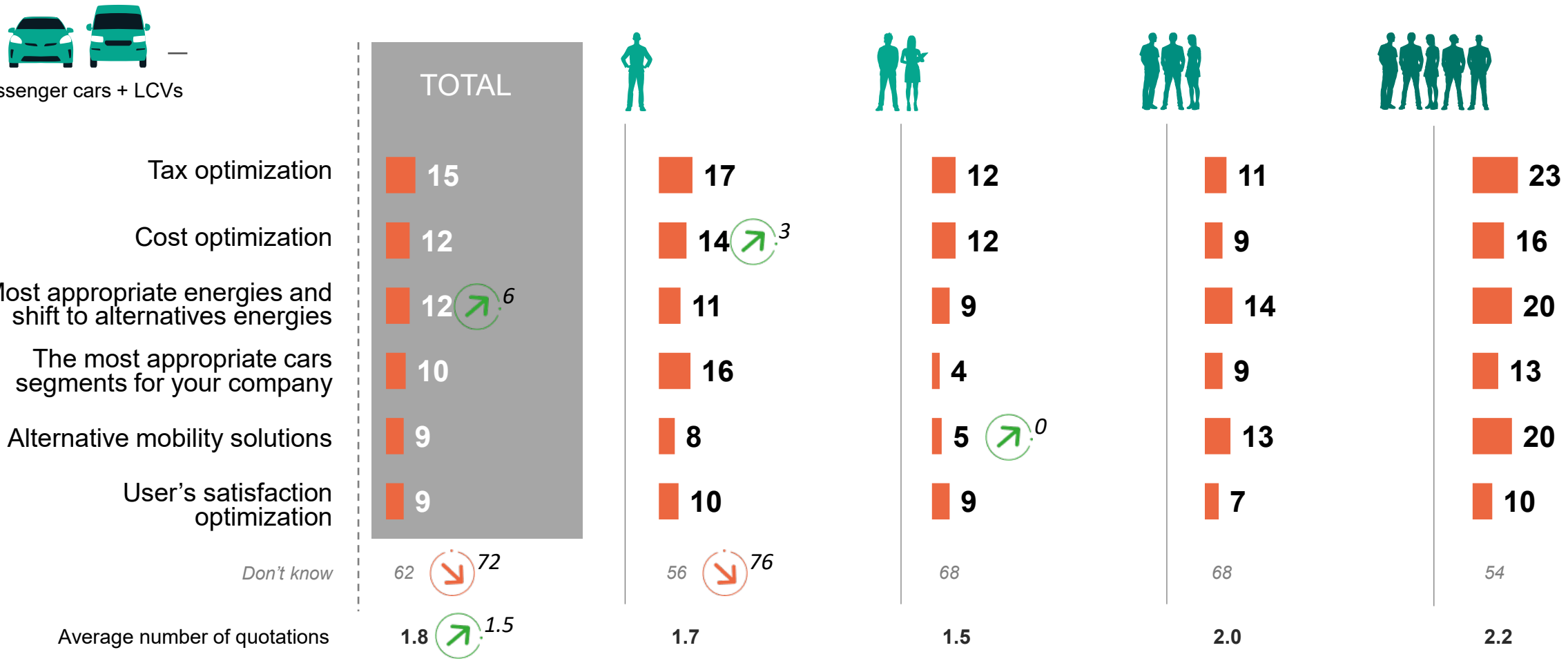
Arval Mobility Observatory

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ELEMENT-ARVAL GLOBAL ALLIANCE

EXTERNAL SUPPLIER ADVICE REQUIRED

In %

Passenger cars + LCVs



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

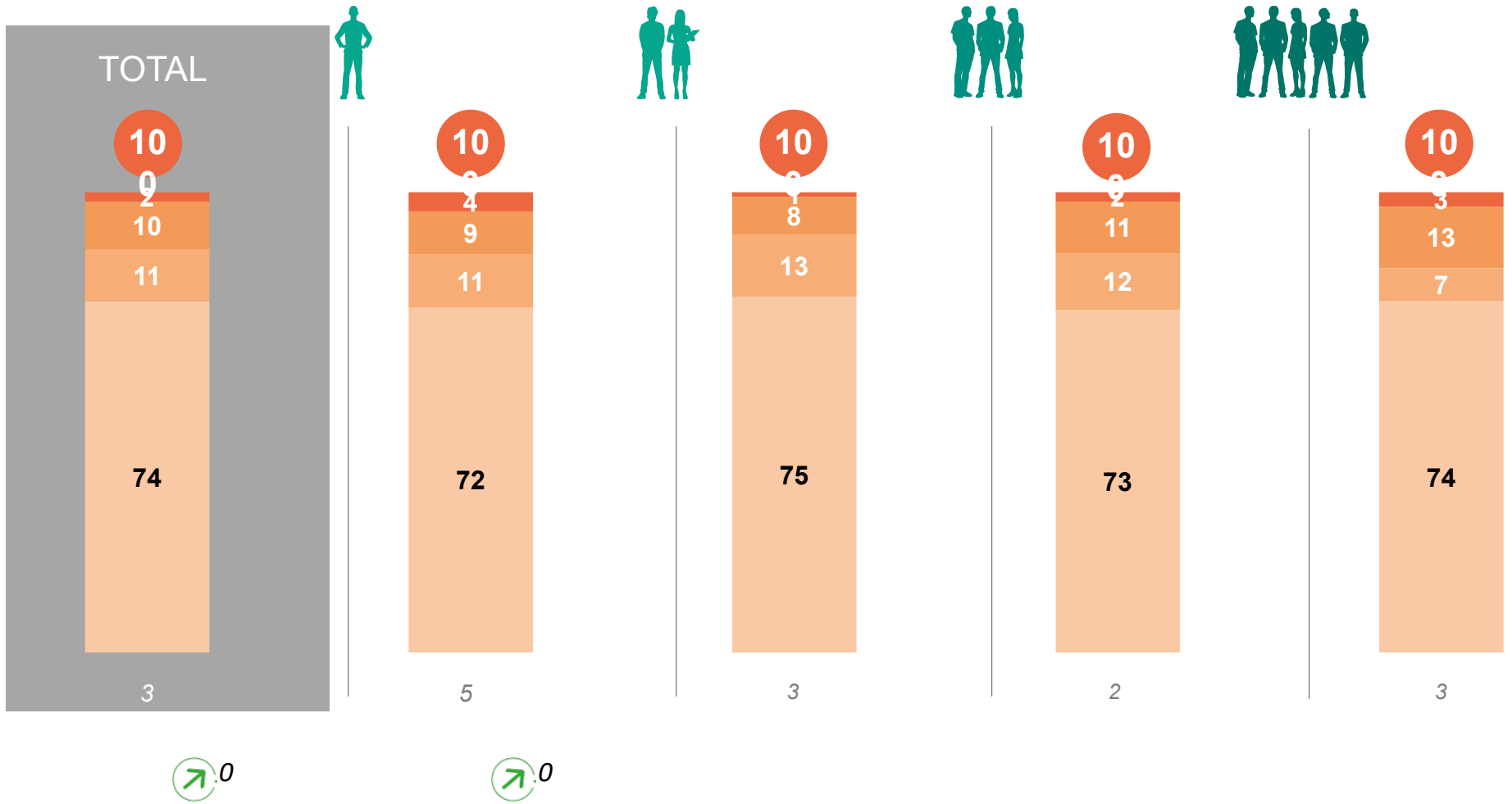
CONSULTING EXPERTISE INTEREST

In %

Passenger cars + LCVs

NET INTERESTED
(very + somewhat)

Very interested
Somewhat interested
Somewhat not interested
Not at all interested



Other

0

0

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

5

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



PHEV LEADS IN A MARKET WHERE ALTERNATIVE FUEL TECHS ADOPTION IS DRIVEN BY LARGE COMPANIES AND FOCUSED ON PASSENGER CARS

1

1 out of 3 companies have expanded their car policy for electric vehicles in terms of brand selection, driven by the >250 employees companies more specifically. Overall, **half of the companies have implemented at least one alternative fuel technology** (among HEV, PHEV or 100% BEV), rather in line with the global average. A total of 8 out of 10 are using or consider using them in the next 3 years.

PHEV is the alternative technology used the most to date for passenger cars (27%), quite ahead of HEV (18%) and 100% BEV (13%). To note though, growth **potentials of all these three technologies are similar and all above global averages**. Their implementation is strongly driven by the >100 employees companies, especially regarding PHEV.

2

The **lower environmental impact (59%), the reduction in fuel expenses (48%) and the improvement in the companies' image (41%) are the main drivers** of the adoption of alternative fuel technologies in New Zealand – in line with the global ranking.

3

As for LCVs, the adoption of 100% BEV and Fuel Cell is almost non-existent to date (3%). Still, their growth potential is in line with the global picture (29% vs 31%), driven by their lower environmental impact and by the reduction in the fuel expenses, like passenger cars.

The limited range of models, the higher purchase price and the too few public charging points are the main barriers to the adoption of 100% BEV, whether for passenger cars or for LCVs. Furthermore, 1 out of 2 companies have no charging points at their premises. To note though, two thirds of the ones using or considering 100% BEV are also considering setting up charging points at their premises.

A very large and reinforced majority of the fleets is expected to be ICE motorized in the next 3 years, whether for passenger cars (82%, +17 pts vs last year) or for LCVs (94%, +13 pts).

4

At last, **4 out of 10 companies are eligible to an ESG regulatory public reporting** to date, and 4 more will be eligible in the next 2 years. Employees mobility is of high importance in this perspective for 1 out of 3 companies among them.

ENERGY MIX

AT LEAST ONE ALTERNATIVE IMPLEMENTED OR CONSIDERED*

for Passenger cars

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

79%

70%

AT LEAST ONE ALTERNATIVE IMPLEMENTED

for Passenger cars

46%

49%

EXPECTED PART OF 100% ELECTRIC PASSENGER CAR IN 3 YEARS

11% 26

17% 18

EXPECTED PART OF 100% ELECTRIC LCV IN 3 YEARS

4% 15

10% 12

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

CAR POLICY FOR ELECTRIC VEHICLES IN TERMS OF BRAND SELECTION

In %

Passenger cars + LCVs

	TOTAL				
% Increased choice of brands	32	29	33	27	44

Have you expanded your car policy for electric vehicles in terms of brand selection?
Basis: Have already implemented EV/PHEV (FOR LCV OR PASSENGER CAR) or Consider implementing EV/PHEV in their fleet (FOR LCV OR PASSENGER CAR)

CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

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

In %

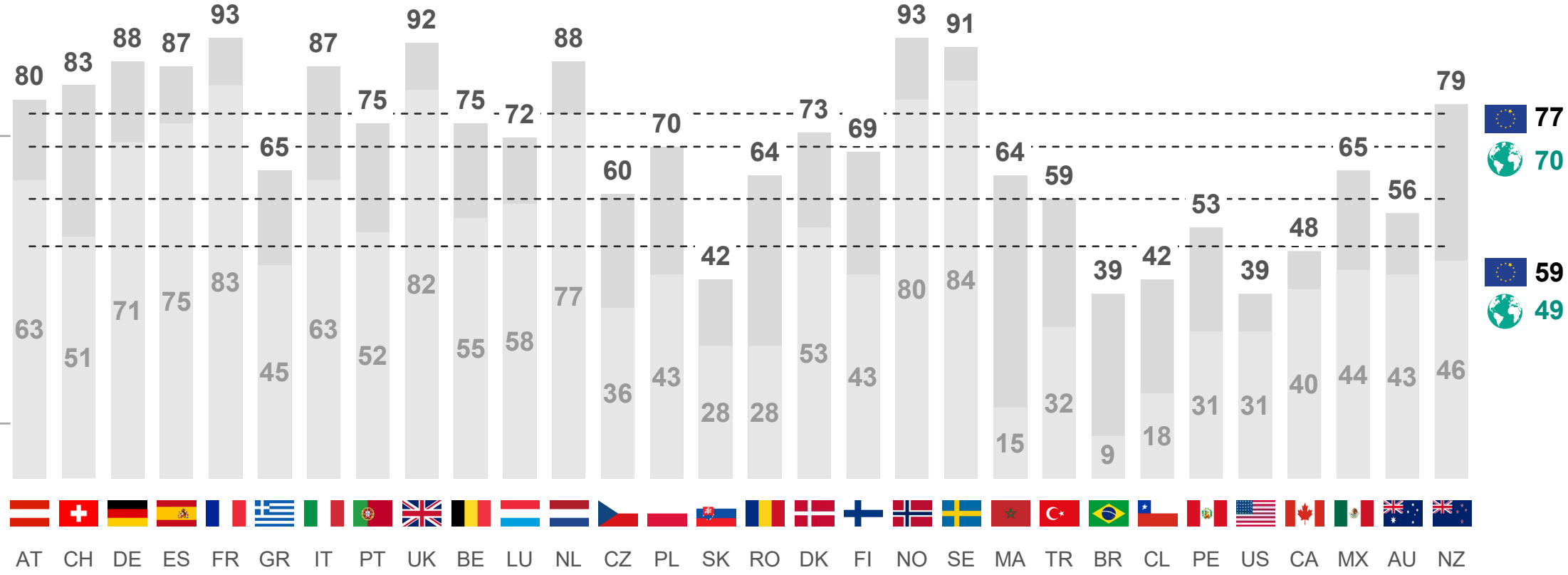
HOW TO READ THE RESULTS ?

In New Zealand, 79% of the companies are already using or consider to implement at least one alternative technology in the next 3 years. 46% 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

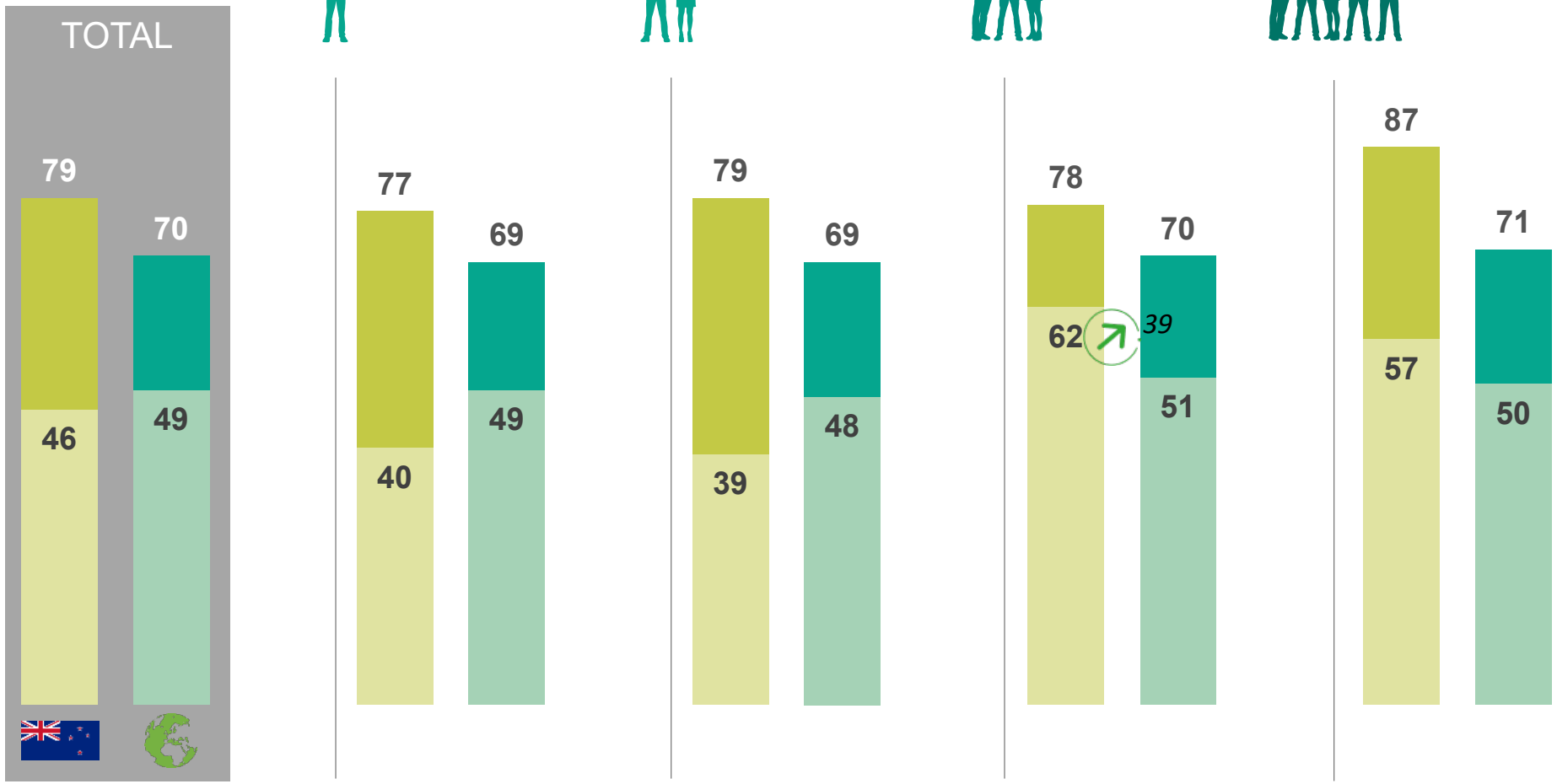
(At least one technology among HEV, PHEV, 100% BEV)

In %

Passenger cars

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

ALREADY USING



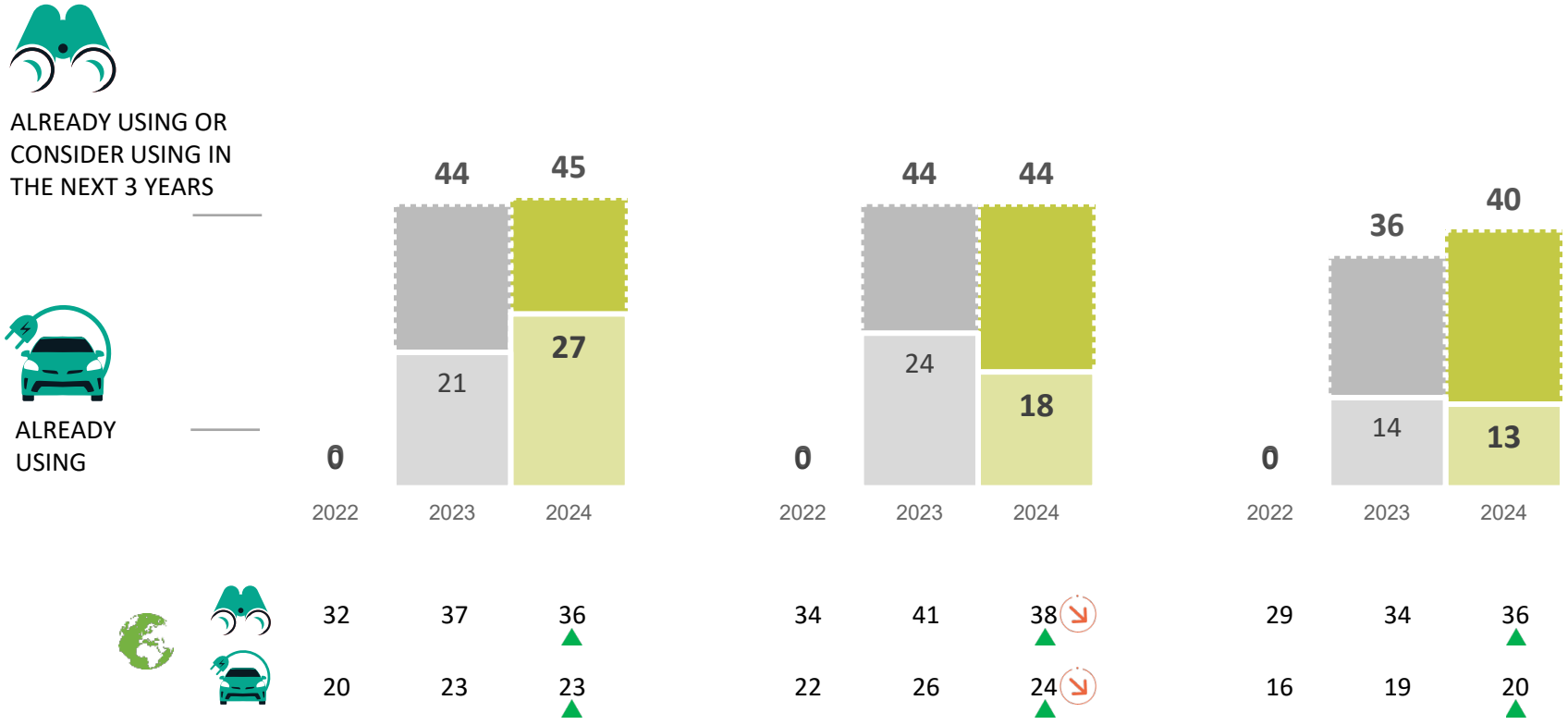
Amongst the following alternative fuel technologies, which ones do you currently use…?
Amongst the following alternative fuel technologies, which ones are you considering using…?
Basis: companies with passenger cars

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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ELEMENT-ARVAL GLOBAL ALLIANCE

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

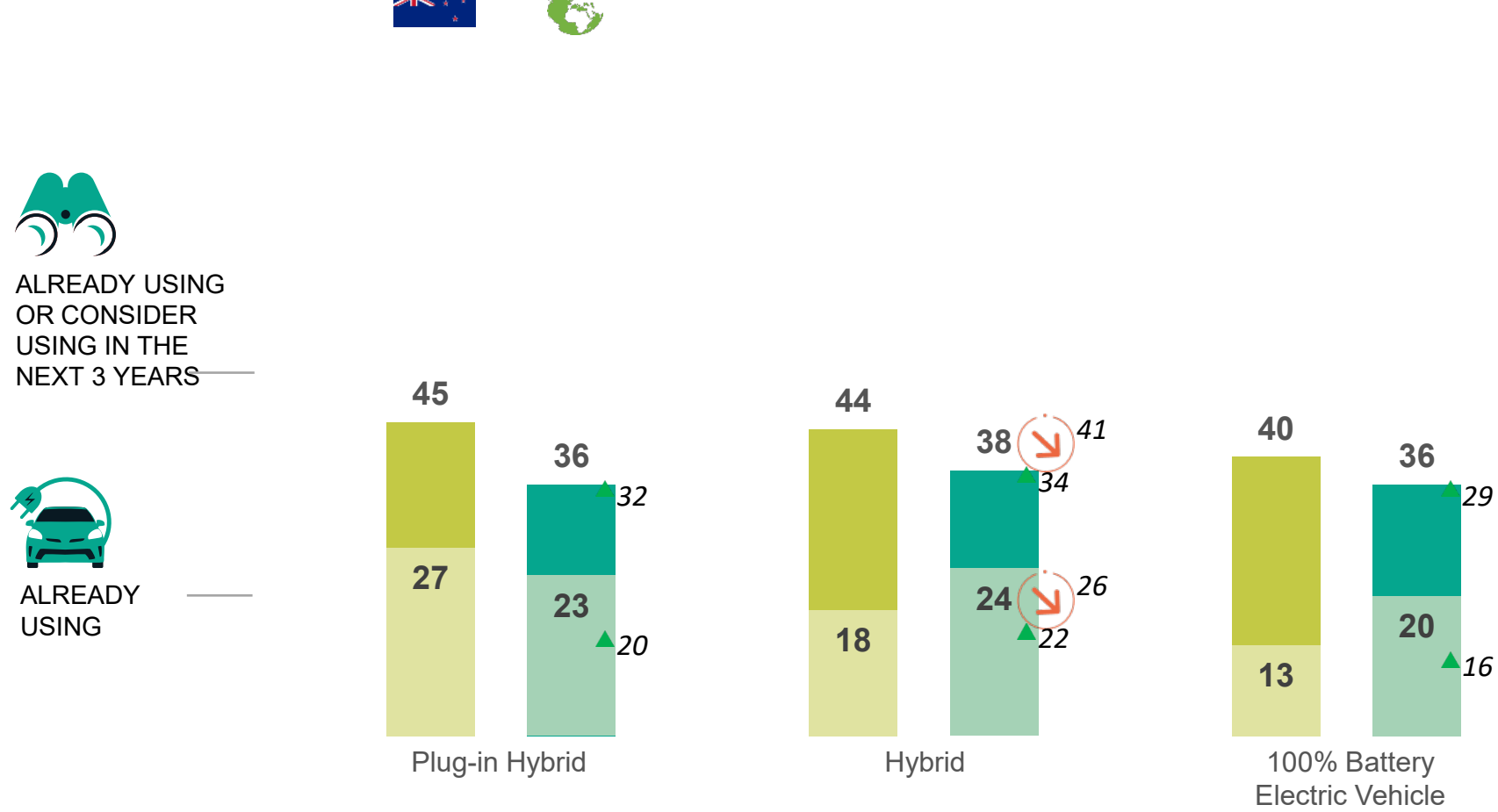
Passenger car fleet

In %

Passenger cars

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

ALREADY USING



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

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REASONS FOR IMPLEMENTING OR CONSIDERING ALTERNATIVE FUEL TECHNOLOGIES

Passenger car fleet

In %



Passenger cars



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

CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

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

In %

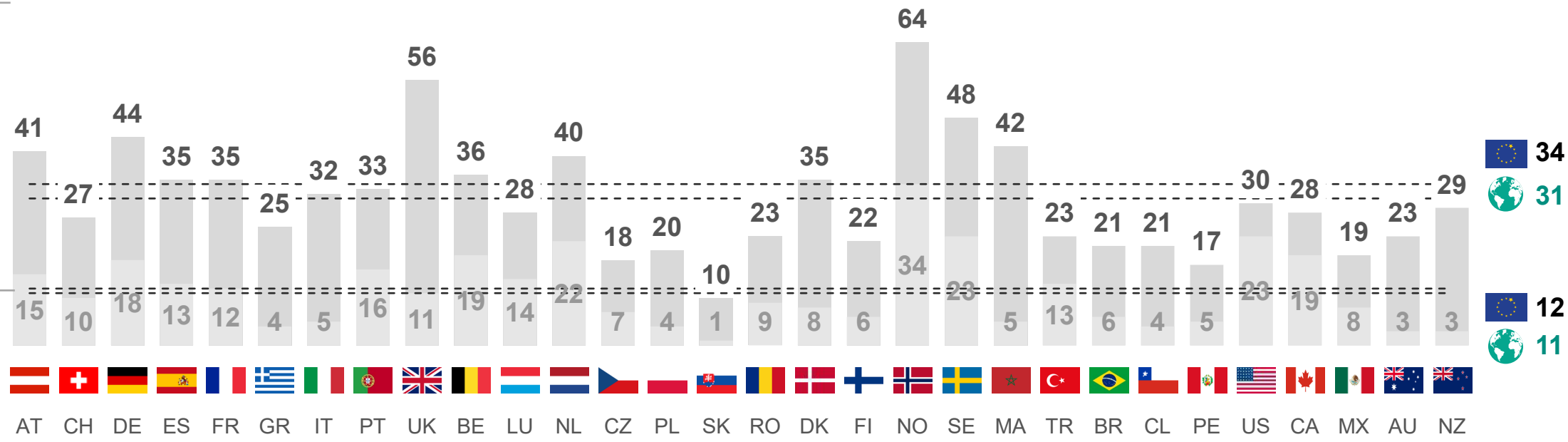
LCVs

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

ALREADY USING

HOW TO READ THE RESULTS ?

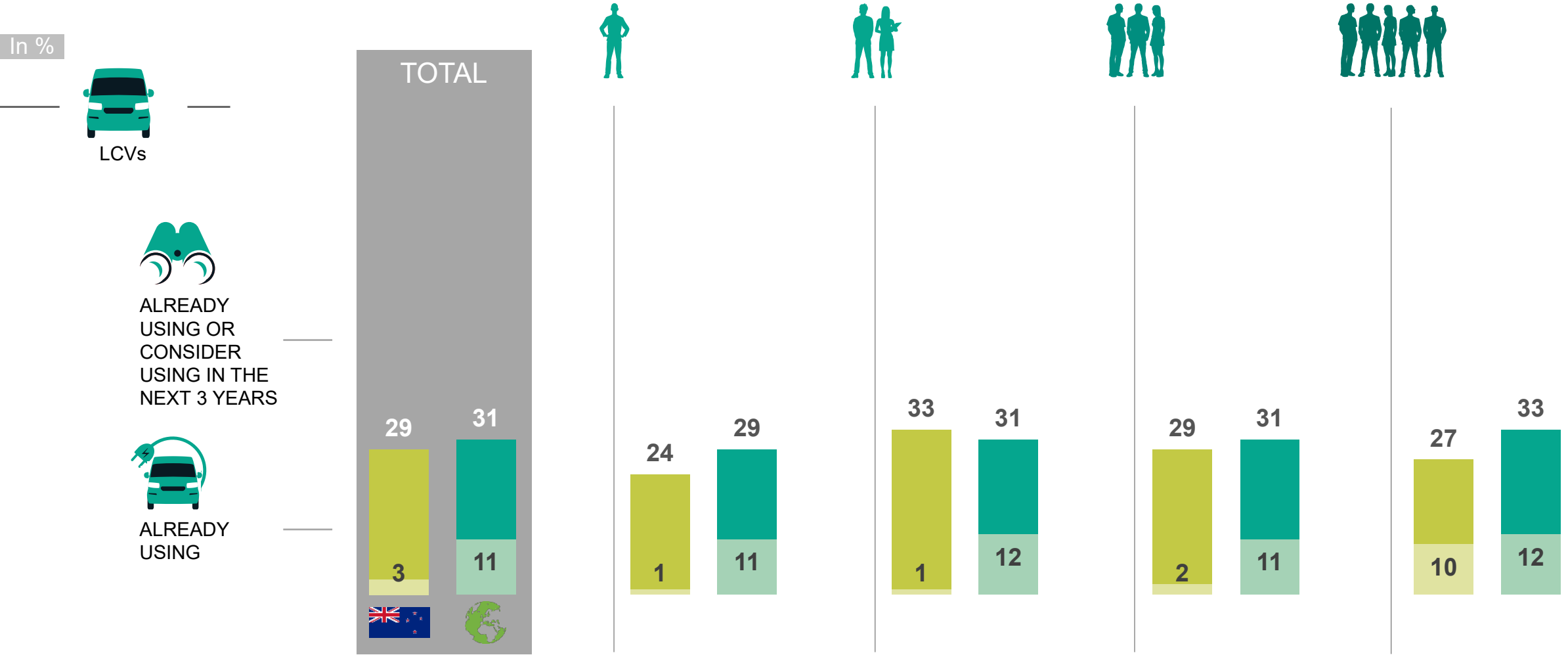
In New Zealand, 29% of the companies are already using or consider to implement at least one alternative technology in the next 3 years. 3% of the companies is currently using at least one.



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

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 %

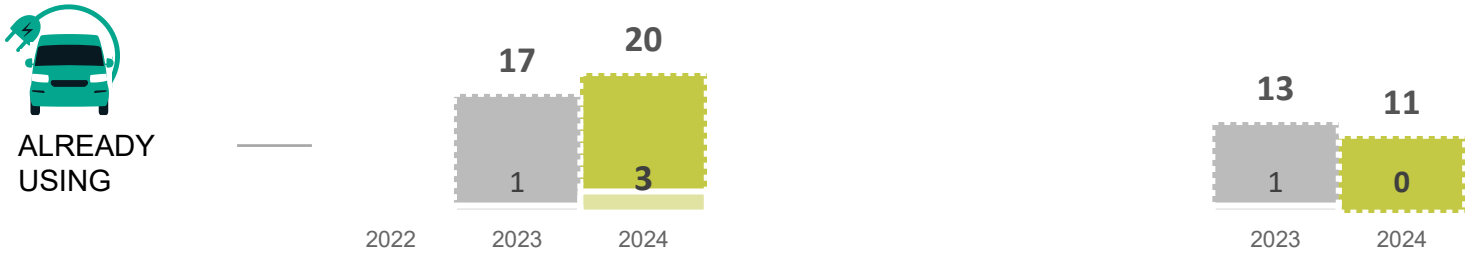
LCVs

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 LCVs

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ELEMENT-ARVAL GLOBAL ALLIANCE

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

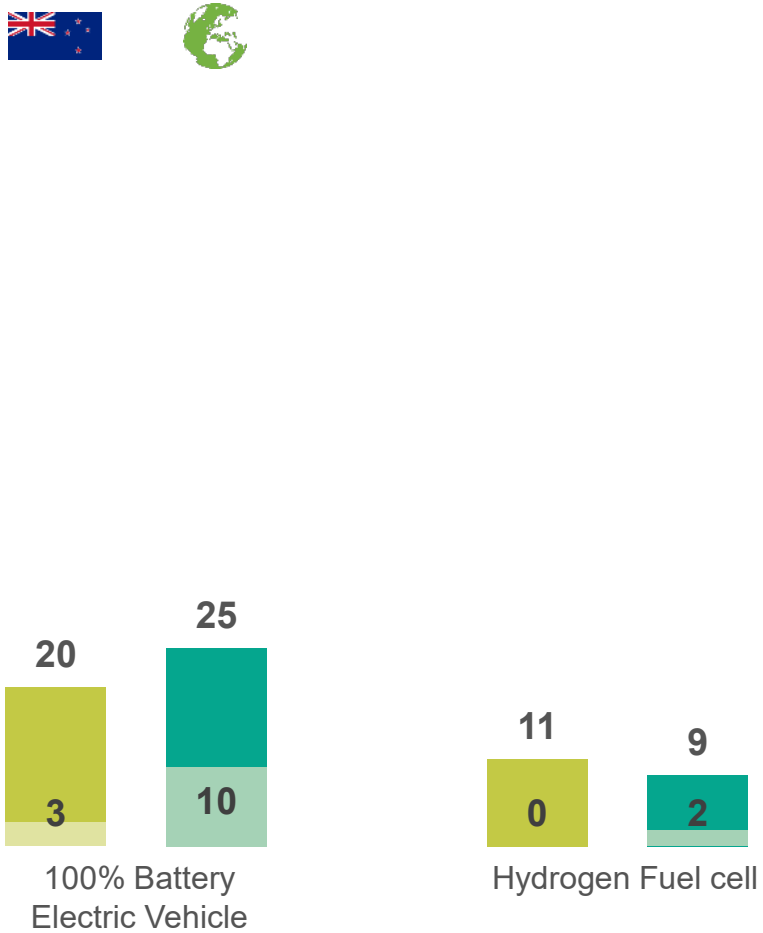
LCV Fleet

In %

LCVs

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

ALREADY IMPLEMENTED



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

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ELEMENT-ARVAL GLOBAL ALLIANCE

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

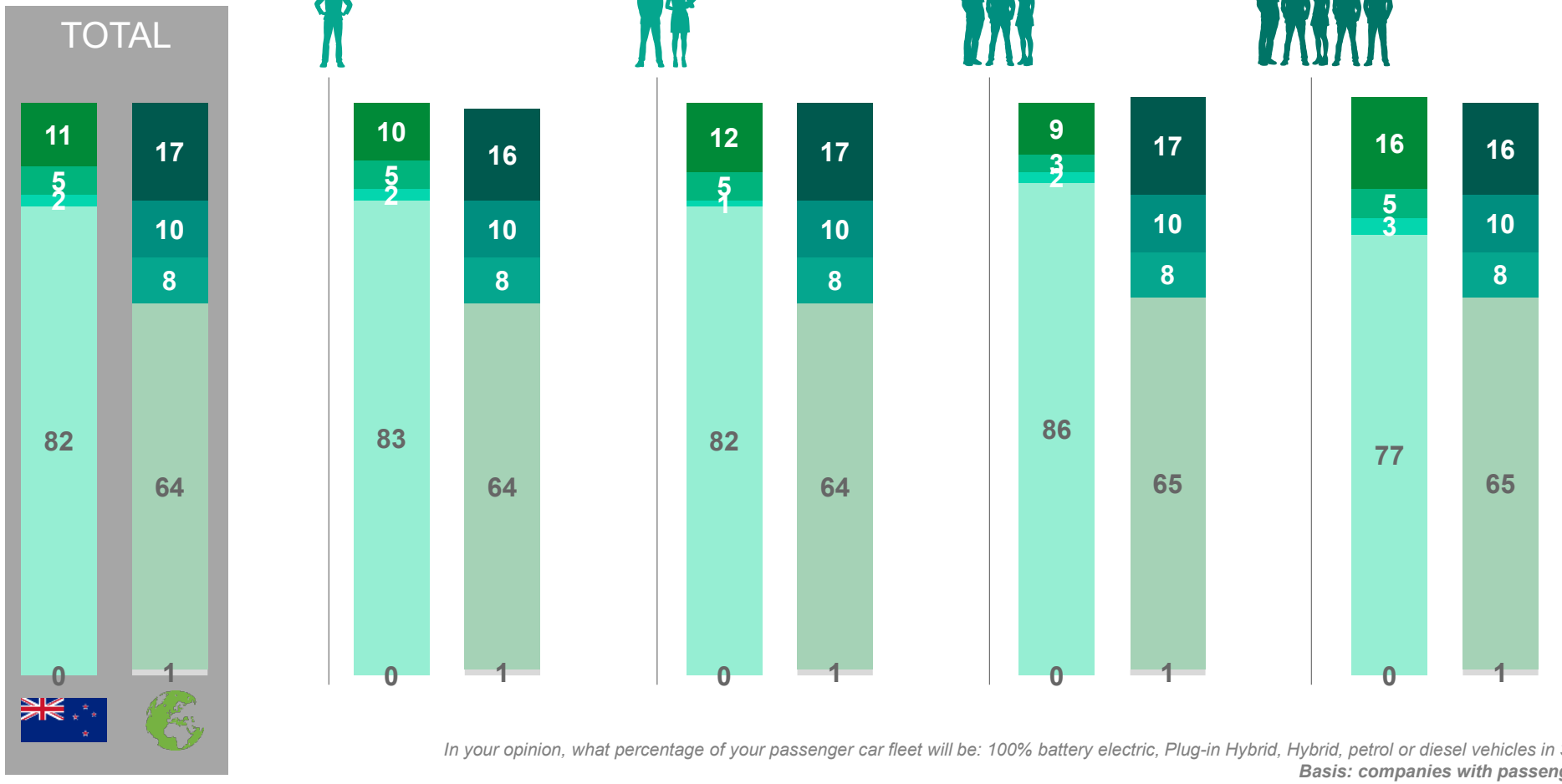
EXPECTED FLEET SHARE PER ENERGY

HOW TO READ THE RESULTS ?

In New Zealand in 3 years, 11% 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

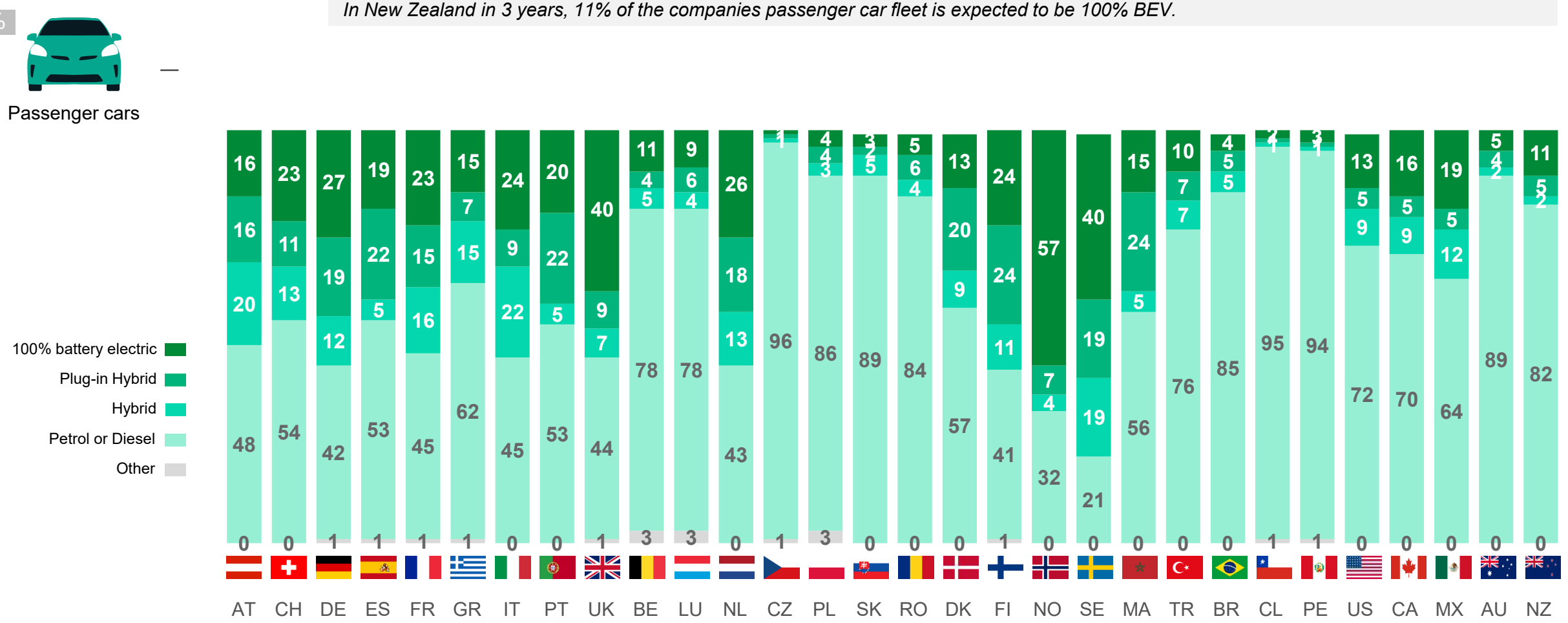
EXPECTED FLEET SHARE PER ENERGY

HOW TO READ THE RESULTS ?

In New Zealand in 3 years, 11% of the companies passenger car fleet is expected to be 100% BEV.

In %

Passenger cars



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

EXPECTED FLEET SHARE PER ENERGY

In %

LCVs

HOW TO READ THE RESULTS ?

In New Zealand in 3 years, 4% of the light commercial vehicle fleet is expected to be 100% BEV.



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

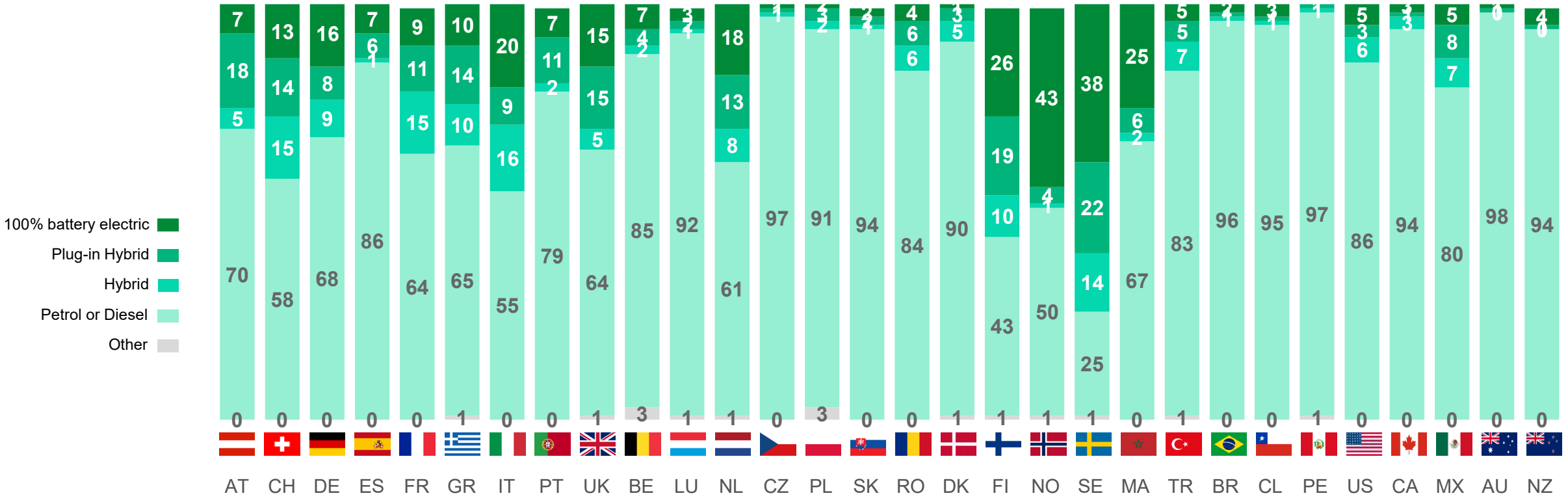
EXPECTED FLEET SHARE PER ENERGY

In %

LCVs

HOW TO READ THE RESULTS ?

In New Zealand in 3 years, 4% of the light commercial vehicle fleet is expected to be 100% BEV.



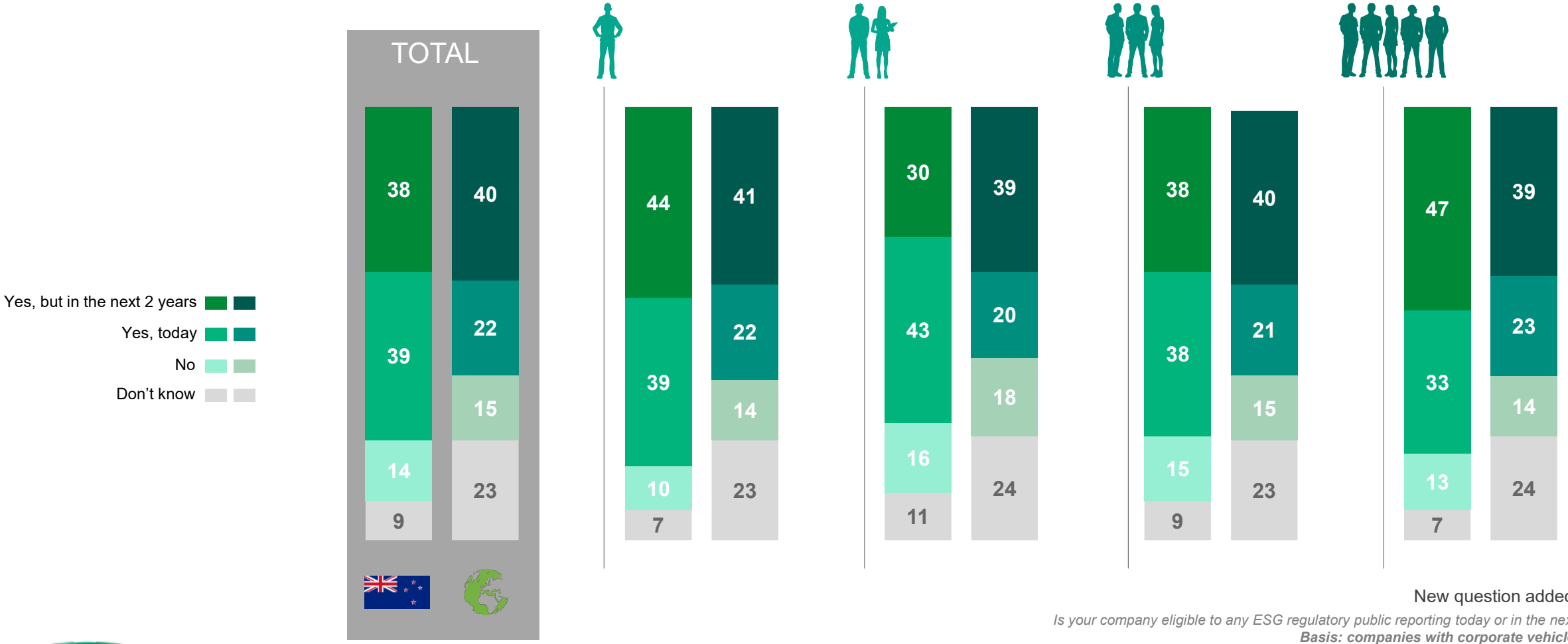
In your opinion, what percentage of your light commercial vehicle fleet will be: 100% battery electric, Plug-in Hybrid, Hybrid, petrol or diesel vehicles in 3 years?
Basis: companies with LCVs

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ELEMENT-ARVAL GLOBAL ALLIANCE

ELIGIBILITY TO ESG REGULATORY PUBLIC REPORTING

In %

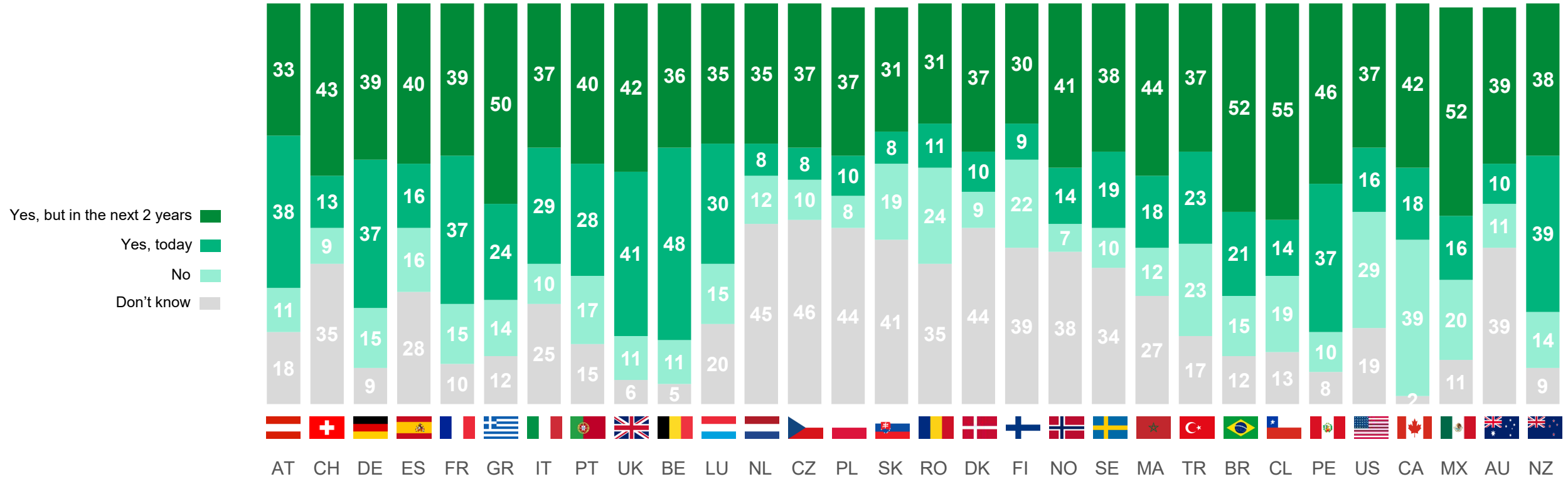


New question added in 2024

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

ELIGIBILITY TO ESG REGULATORY PUBLIC REPORTING

In %

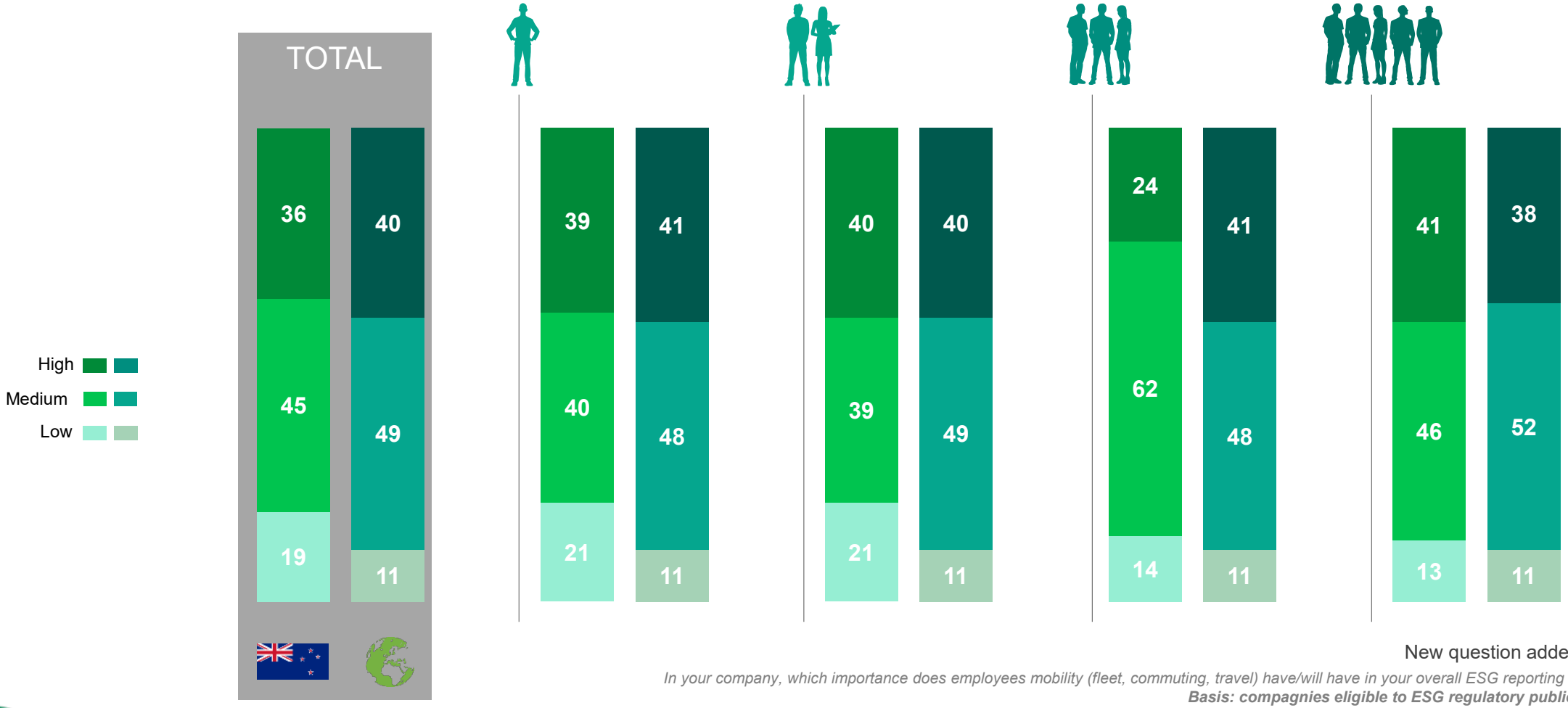


New question added in 2024

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 %

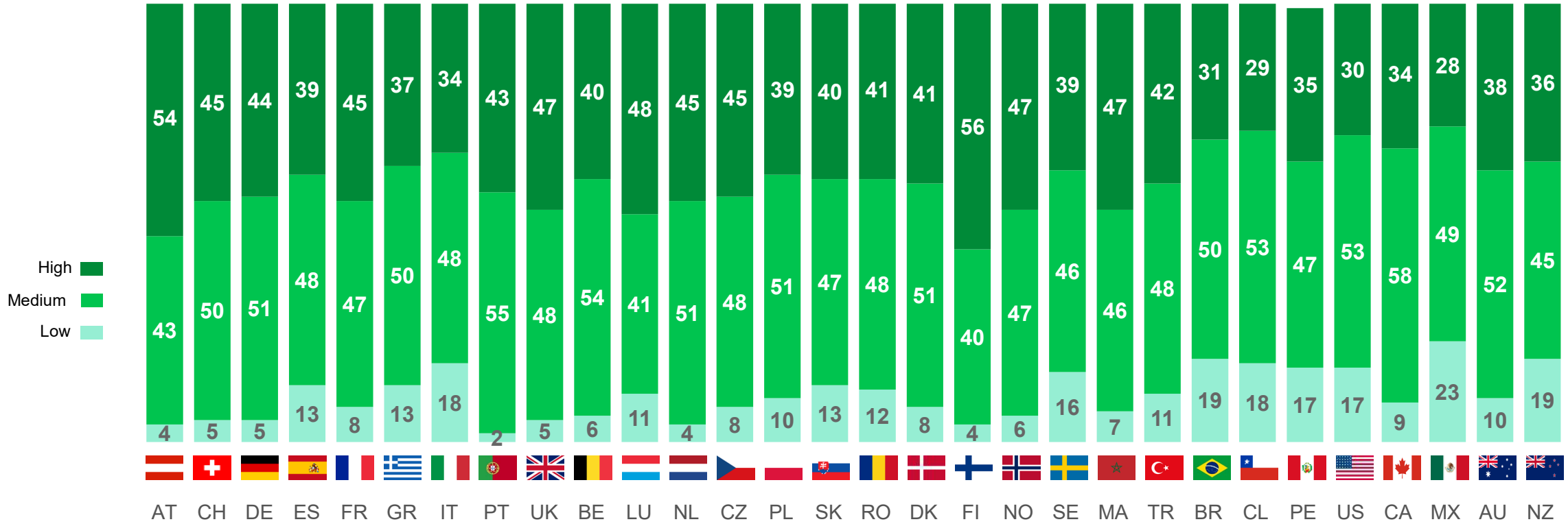


New question added in 2024

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



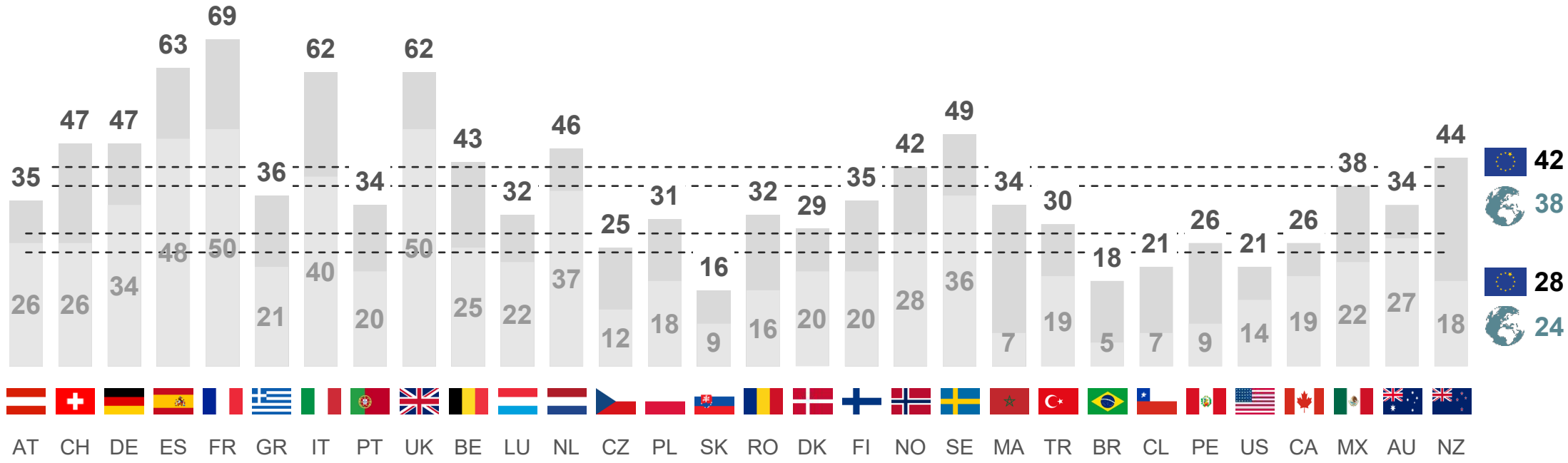
HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

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

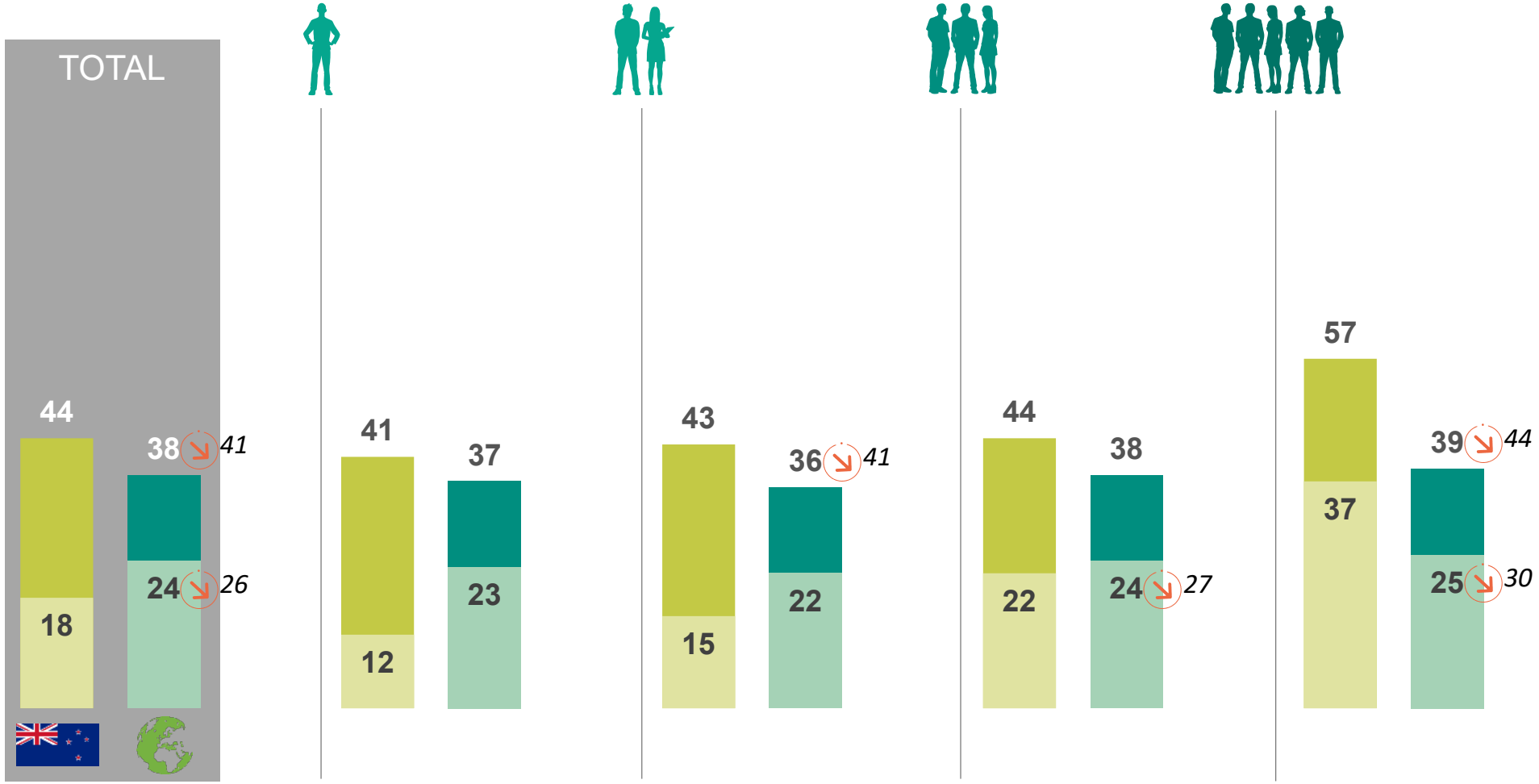
HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

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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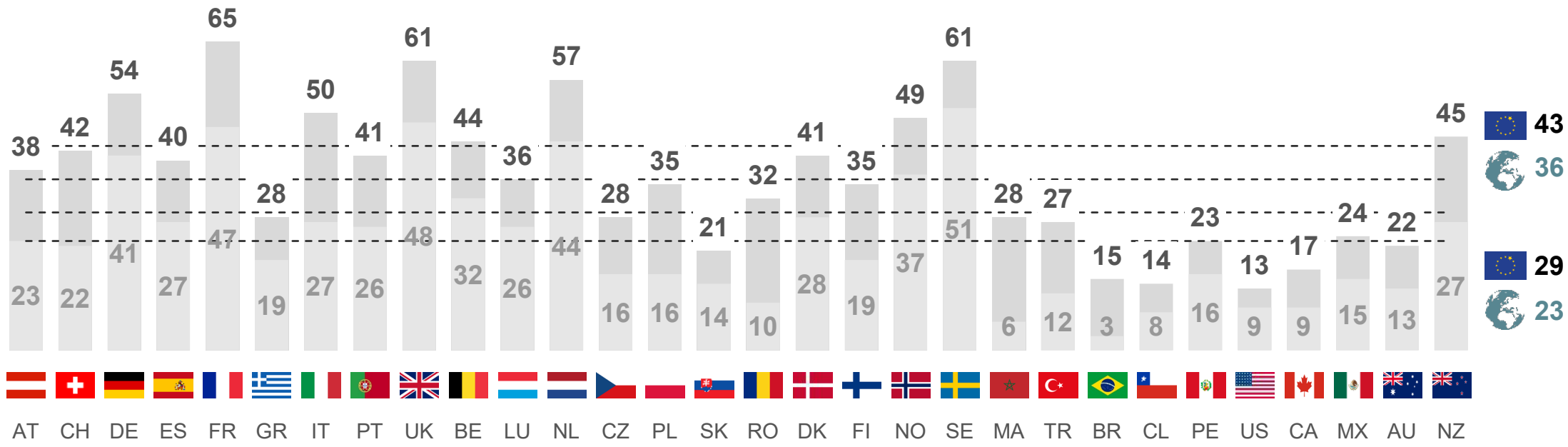
PLUG-IN HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %

Passenger cars

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



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

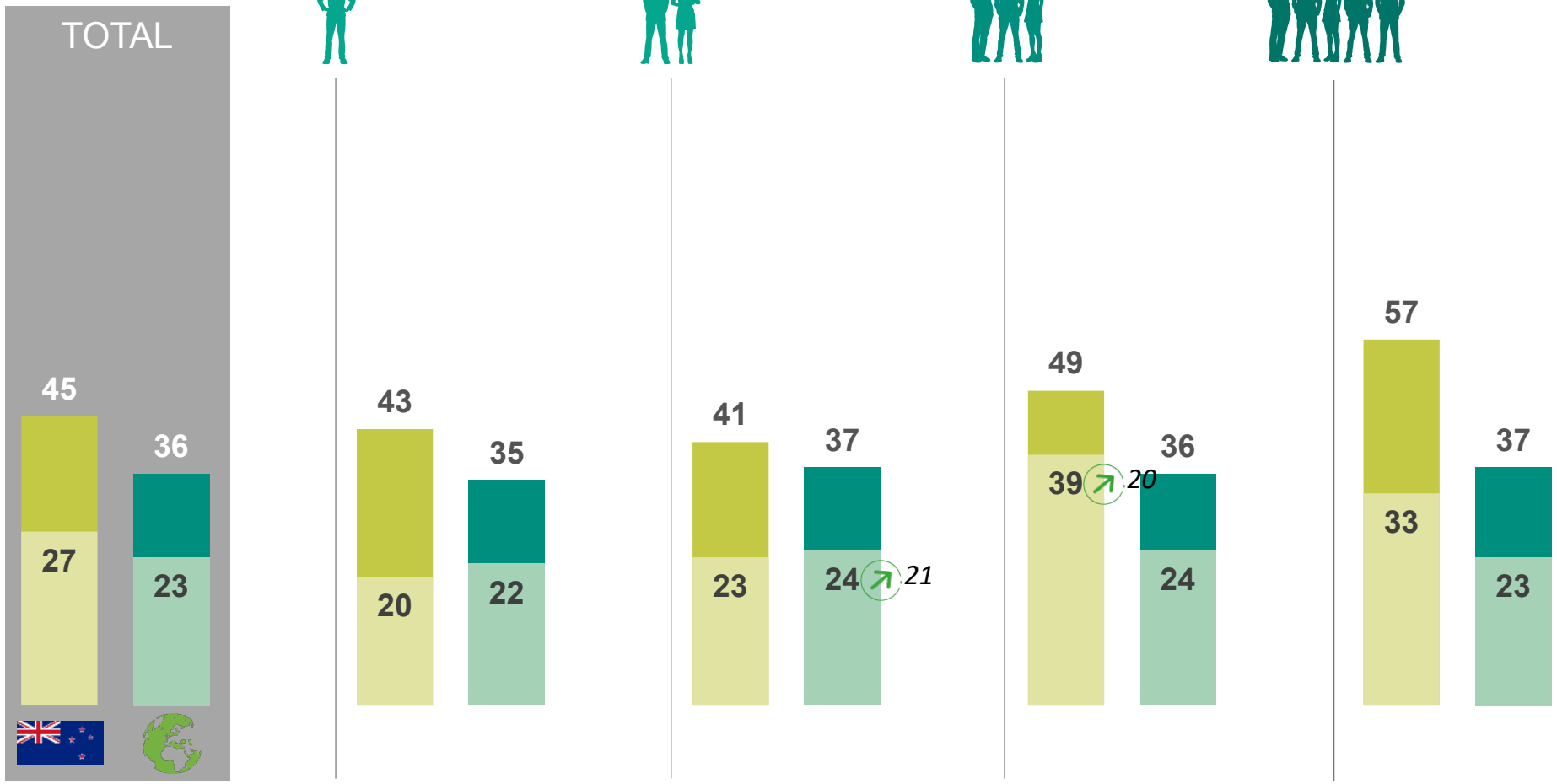
PLUG-IN HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

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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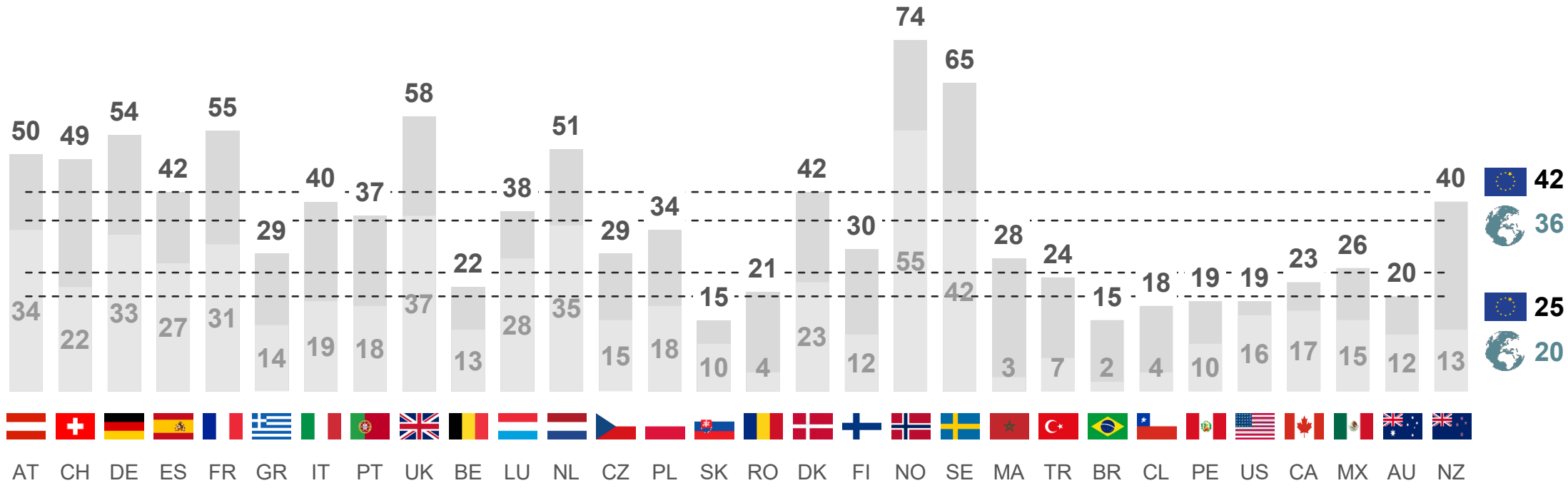
100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

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

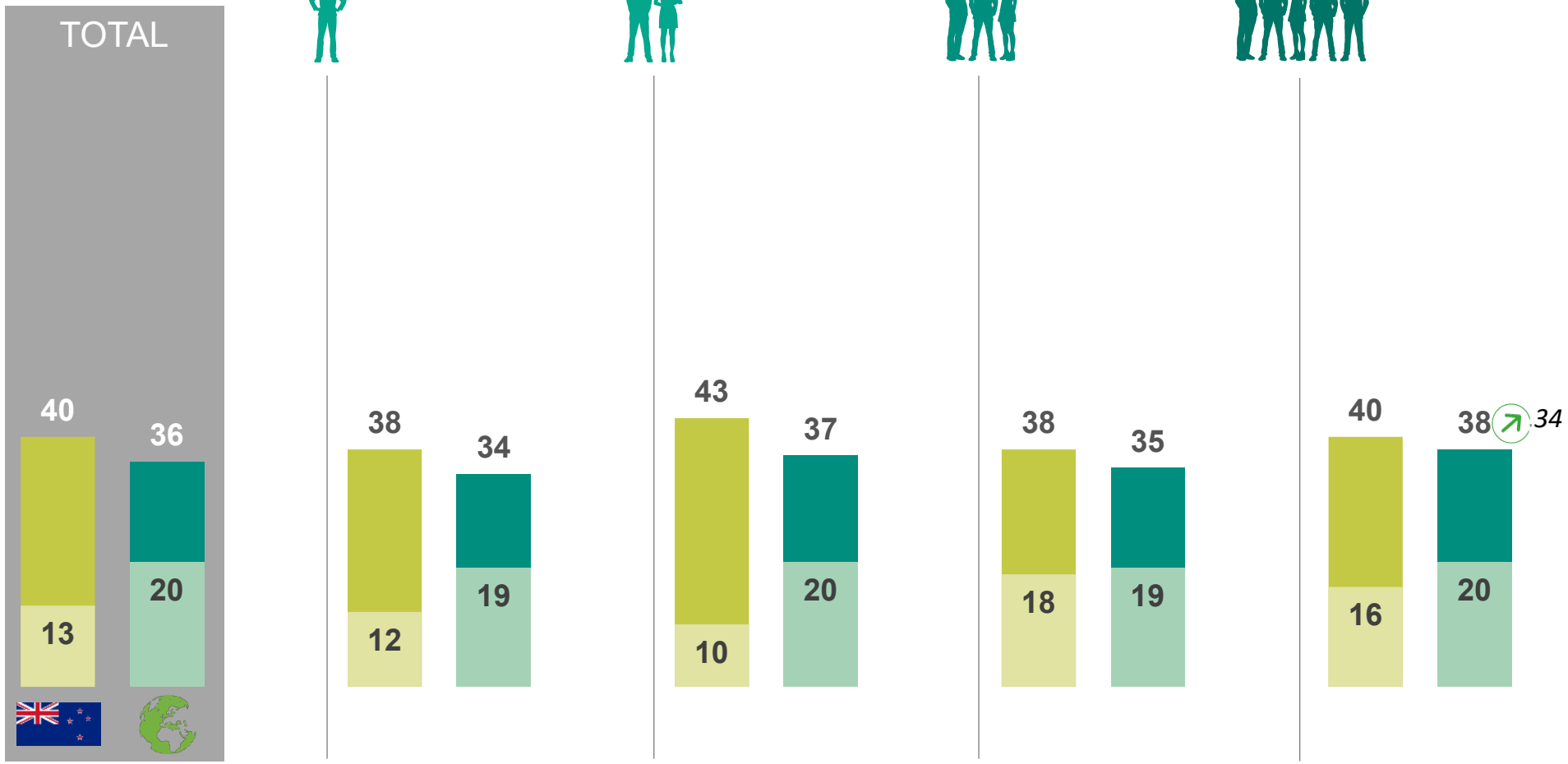
100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

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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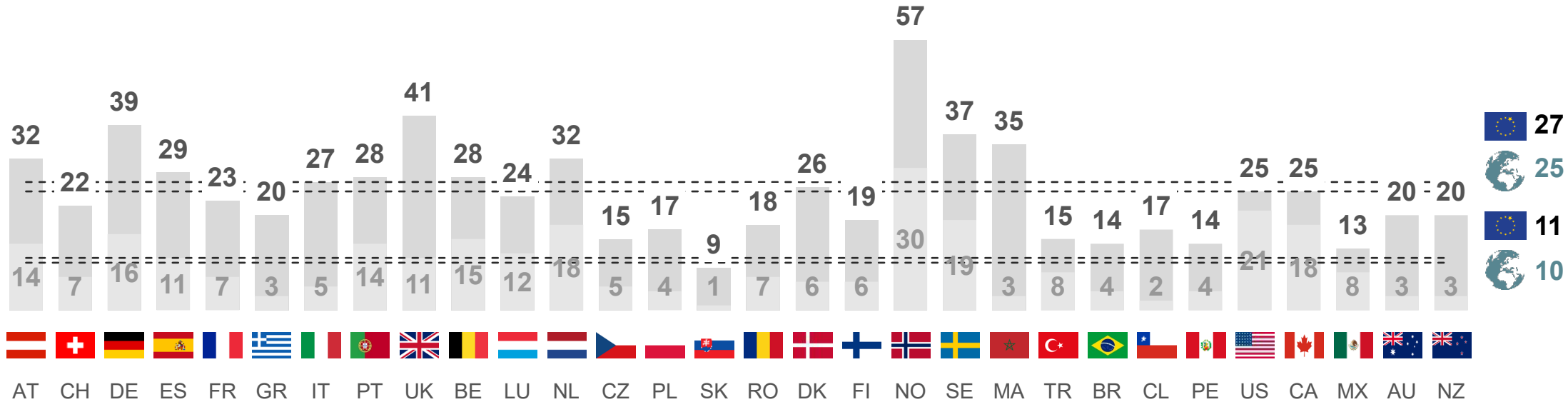
100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %

LCVs

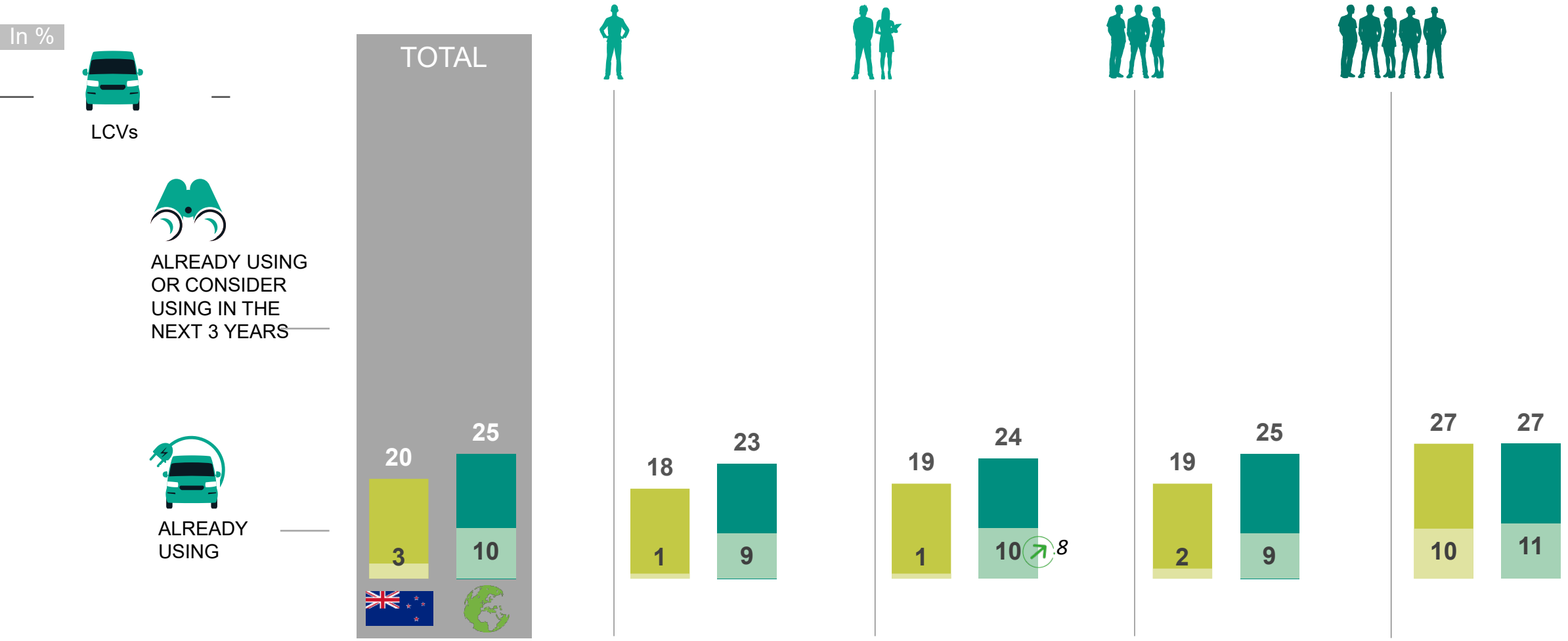
ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



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

100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY



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

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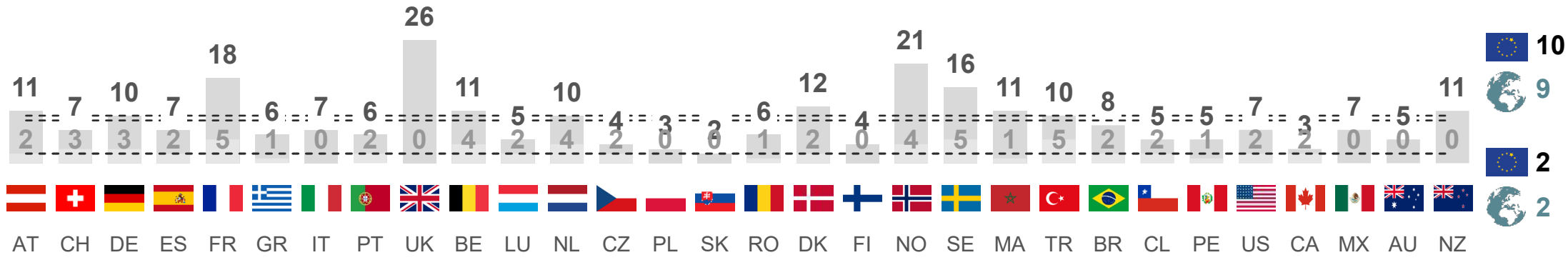
HYDROGEN FUEL CELL ELECTRIC VEHICLE : IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %

LCVs

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



Arval Mobility Observatory

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ELEMENT-ARVAL GLOBAL ALLIANCE

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

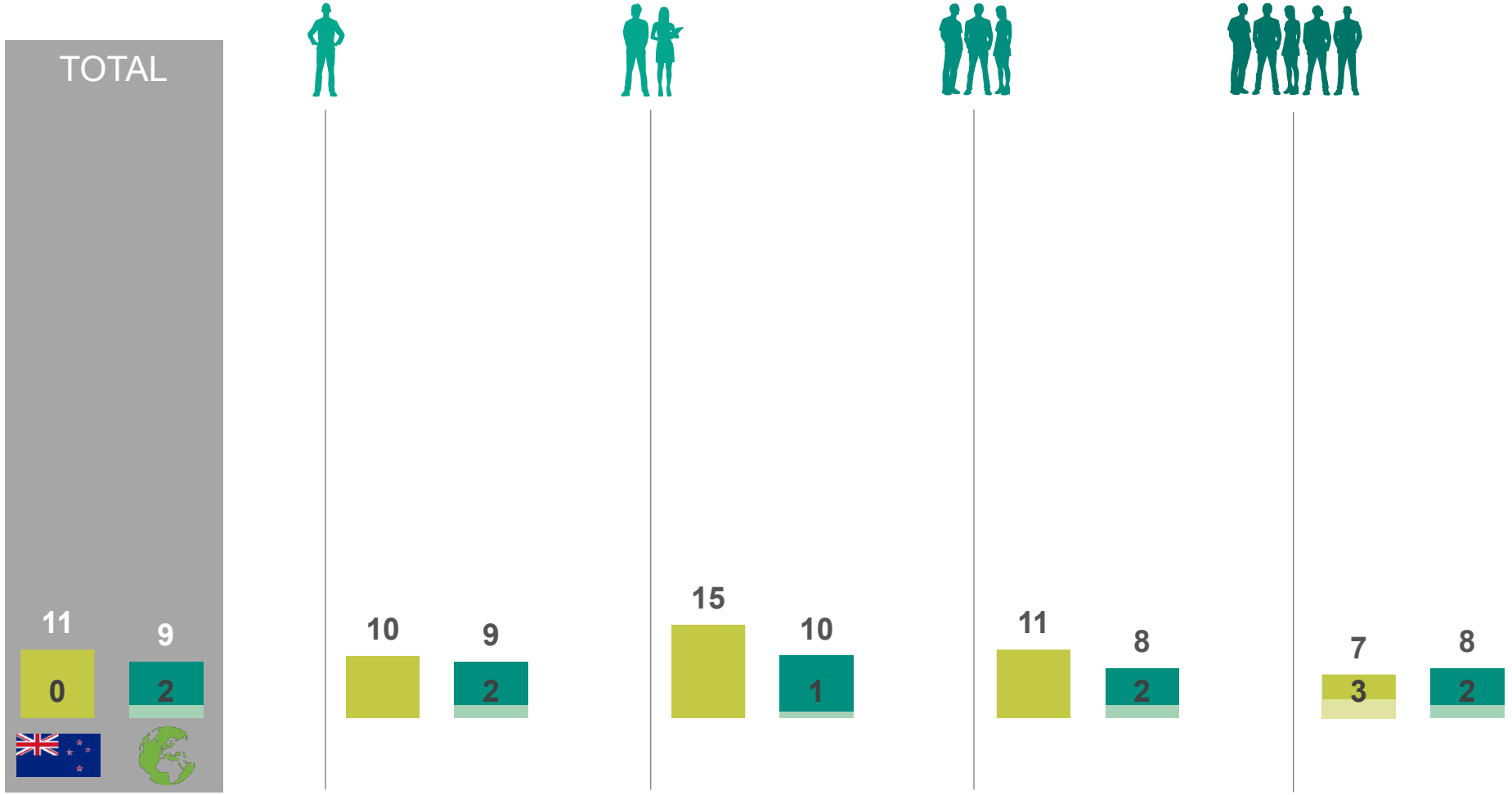
HYDROGEN FUEL CELL ELECTRIC VEHICLE : IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %

LCVs

ALREADY USING OR CONSIDER 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

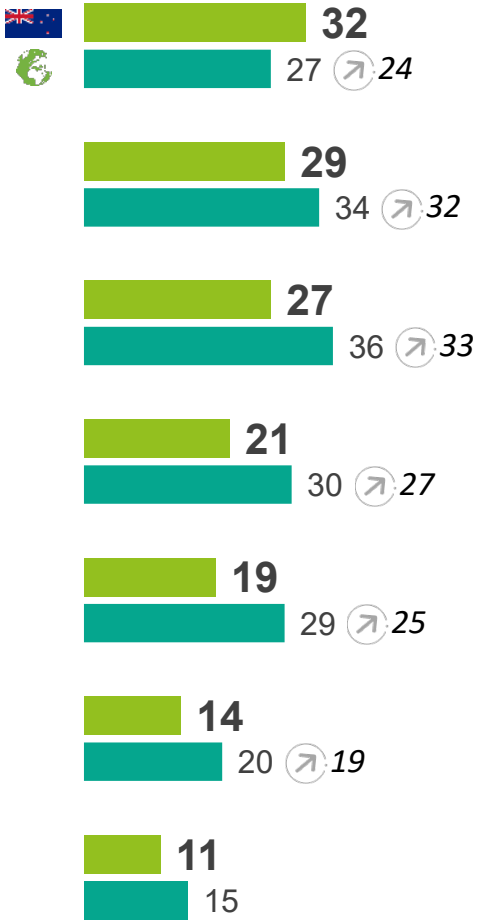
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CONSTRAINTS OF 100% BATTERY ELECTRIC VEHICLE USAGE

In %

Passenger cars + LCVs



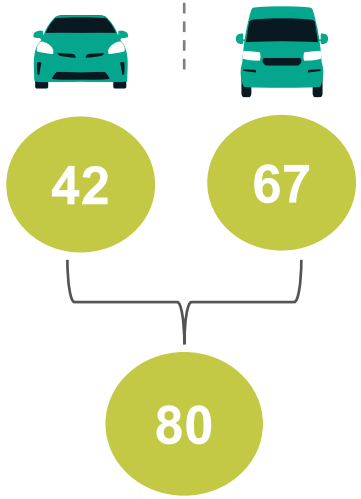
What are the constraints of using 100% Battery Electric vehicles?
Basis: Know 100% BEV technology

CONSTRAINTS OF 100% BATTERY ELECTRIC VEHICLE USAGE

In %

Passenger cars + LCVs

do not consider implementing battery electric vehicles



The range of models is limited for this type of vehicles	33 / 28
The purchase price is higher than a regular fuel car	29 / 35
Not enough public charging points	24 / 35
No charging points at your company offices	21 / 31 (29)
No charging solutions at your employees' home	17 / 29 (25)
The questions raised on their reliability	16 / 21
Your employee's reluctance to drive electric vehicles	10 / 16

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

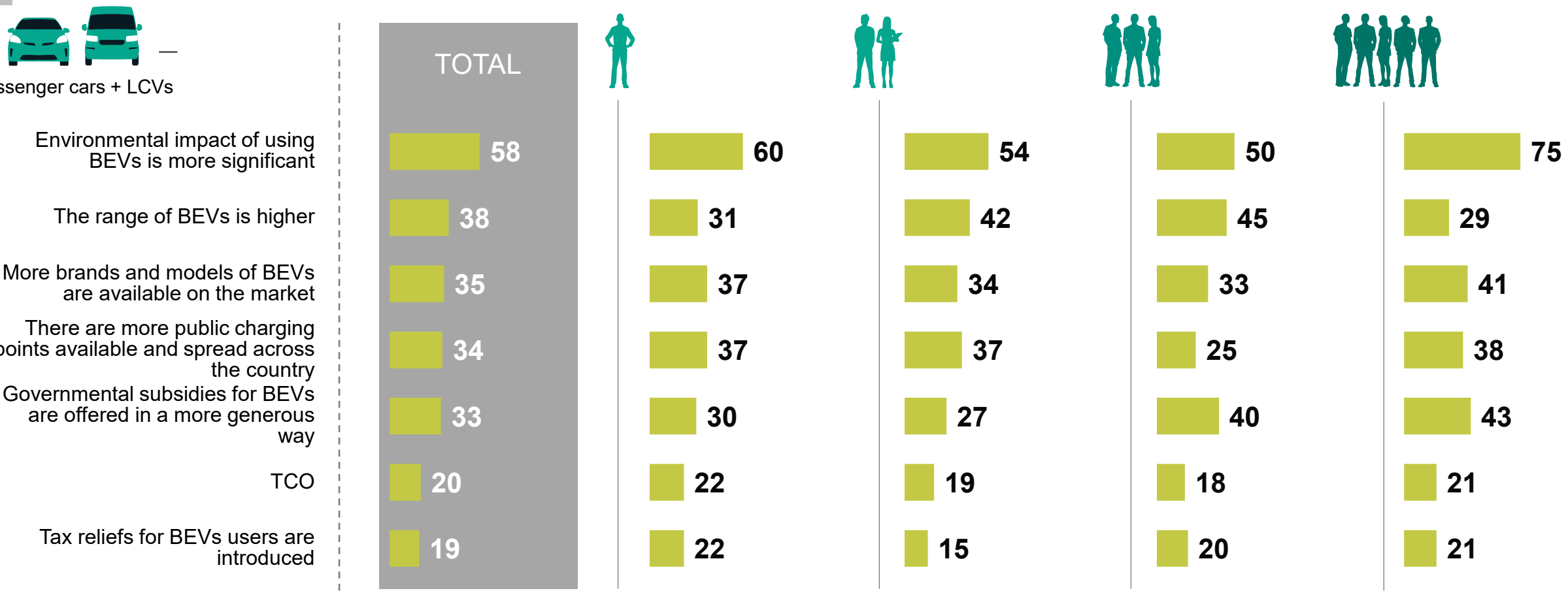
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MAIN REASONS TO START ORDERING MORE BEVS

In %

Passenger cars + LCVs



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

ACCESS TO CHARGING POINTS

In %

Passenger cars + LCVs



	TOTAL				
Currently no charging points installed at the company premises	51 / 47 (42)	54 / 47 (42)	51 / 47 (43)	49 / 47 (43)	48 / 46 (40)
Charging points are planned to be installed at the company premises in the next 12 months	24 / 30	25 / 30	23 / 29	22 / 31	25 / 29
Drivers have to pay for home installation of charging points	19 / 26	21 / 25	16 / 25	17 / 26	25 / 27
Charging points installed at the company premises and free charging for drivers	10 (19) / 13 (15)	4 (24) / 12 (15)	10 / 14	12 / 12	20 / 13
Charging points installed at the company premises and drivers charged for charging	8 / 7	5 / 7	8 / 7	12 / 6	4 / 6
Company subsidises cost of home installations of charging points for drivers	3 / 20 (16)	4 / 19	3 / 21 (14)	2 / 19 (16)	0 / 21

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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EQUIPMENT IN CHARGING POINTS

In %

Passenger cars + LCVs



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

COMPANY'S STRATEGY TOWARDS PROVIDING CHARGING POINTS

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

In %

Passenger cars + LCVs



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

6

WHAT ARE THE PERSPECTIVES IN TERMS OF MOBILITY SOLUTIONS?





MOBILITY SOLUTIONS



TOP 3 USED SOLUTIONS

		AU	Global
#1	A short or mid term rental vehicle to provide mobility for an employee	20%	17%
#2	Car or cash allowance	19%	17%
#3	Corporate car sharing: where an employee can make a vehicle reservation via an external solution	11%	12%





TOP 3 POTENTIAL NEXT 3 YEARS



		AU	Global
#1	Car or cash allowance	36%	28%
#2	A short or mid term rental vehicle to provide mobility for an employee	33%	27%
#3	Mobility Budget: a predefined budget provided by the company that allows employees to choose their mode of transport.	24%	28%



A REINFORCED ADOPTION POTENTIAL OF MOBILITY SOLUTIONS THAT SHOULD STAY FOCUSED ON SHORT OR MID-TERM RENTAL VEHICLES AND CAR/CASH ALLOWANCE

1

6 out of 10 companies have implemented at least one mobility solution to date, stable and below the 75% global average. **Growth potential has risen** vs last year though (87%, +9 pts).

Short or mid-term rental vehicles (20%) and car/cash allowance (19%) come as the mobility solutions adopted the most. They are also the ones **showing the strongest adoption potentials in the next 3 years**. Other solutions are all more marginal. All being mostly considered as add-ons to the corporate vehicles fleets, which remain essential business transport tools for most companies (67%).

2

Like in the global picture, **HR related needs (talent recruitment, employees retainment) are the main driver** of the adoption of mobility solutions. Answering specific requests of some employees, compliance with CSR policies, improvement in the companies' image and anticipation of upcoming regulations are also at stake but to a more limited extent.

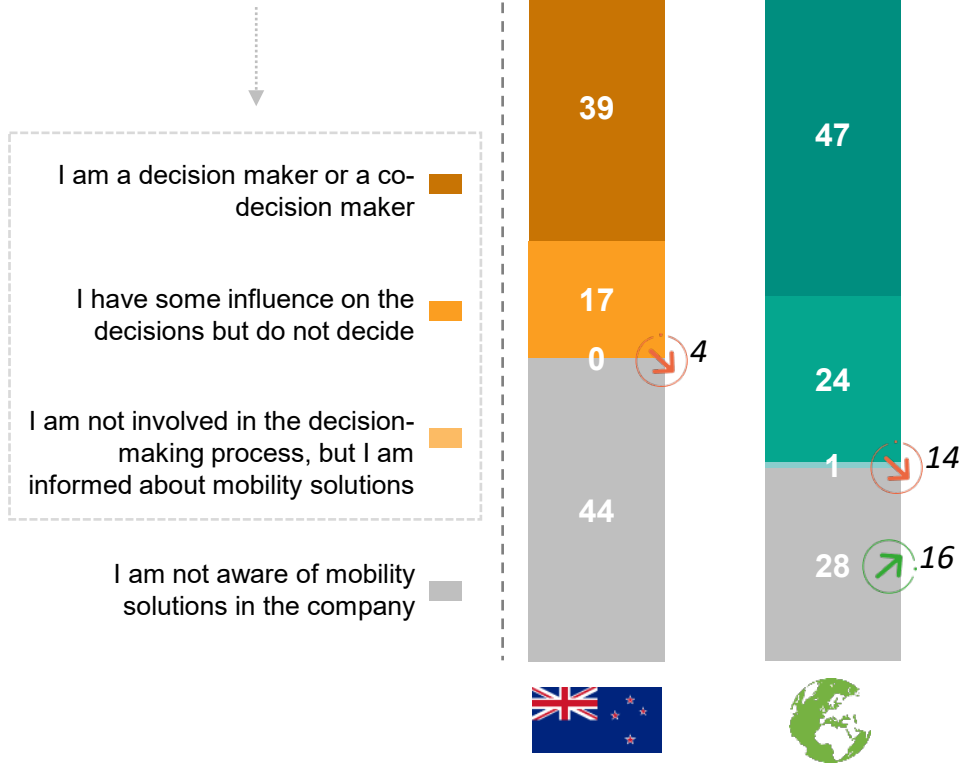
3

Private cars are the main mean to commute to work by far (58%). And half of companies have policies in place for cars that are owned by employees but used on business.

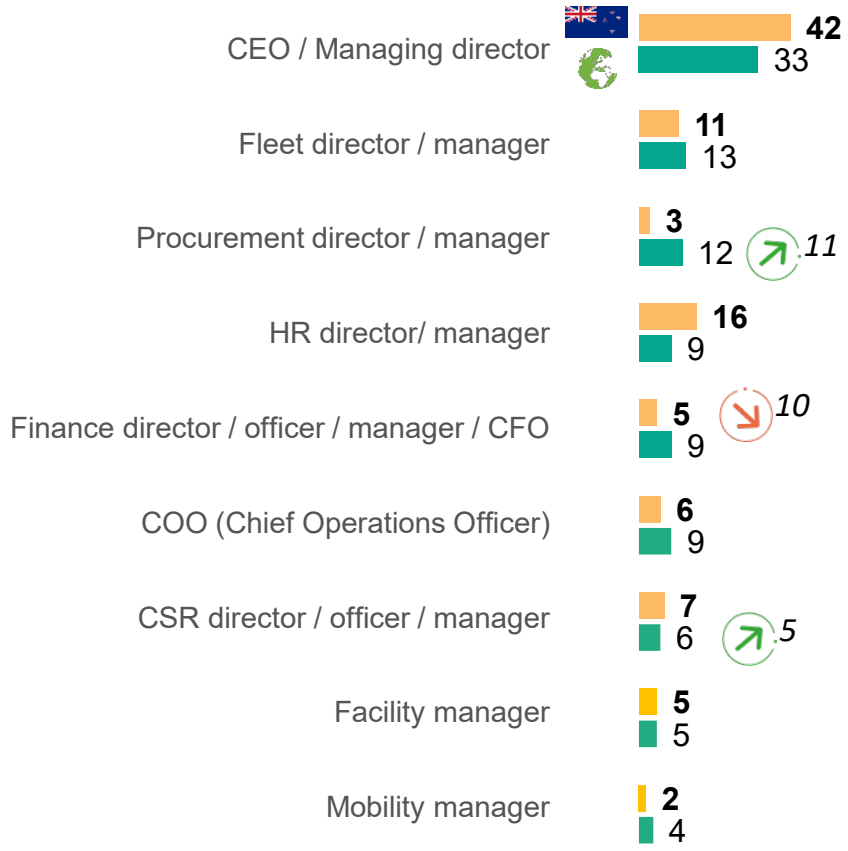
MOBILITY SOLUTION DECISION MAKERS

RESPONDENTS INVOLVEMENT IN MOBILITY SOLUTION DECISIONS

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



POSITION OF THE PERSON WHO DECIDES ON MOBILITY SOLUTIONS

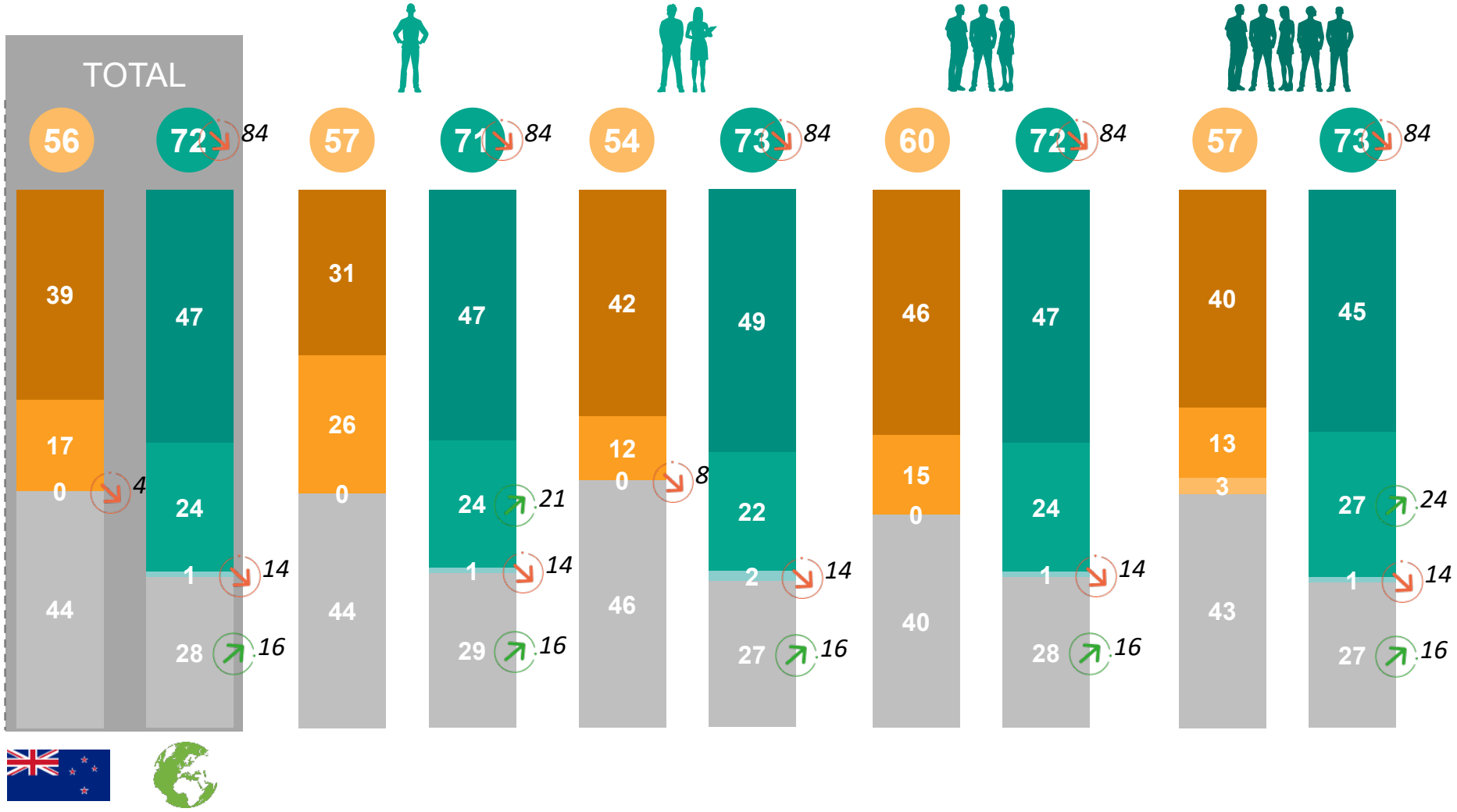


To what extent are you informed about mobility solutions using other modes of transportation than company cars (such as car sharing , bike sharing etc….)
What is the position of the person who decides on mobility solutions in your company??
Basis: companies with corporate vehicles = 100%

RESPONDENTS INVOLVEMENT IN MOBILITY SOLUTION DECISIONS

In %

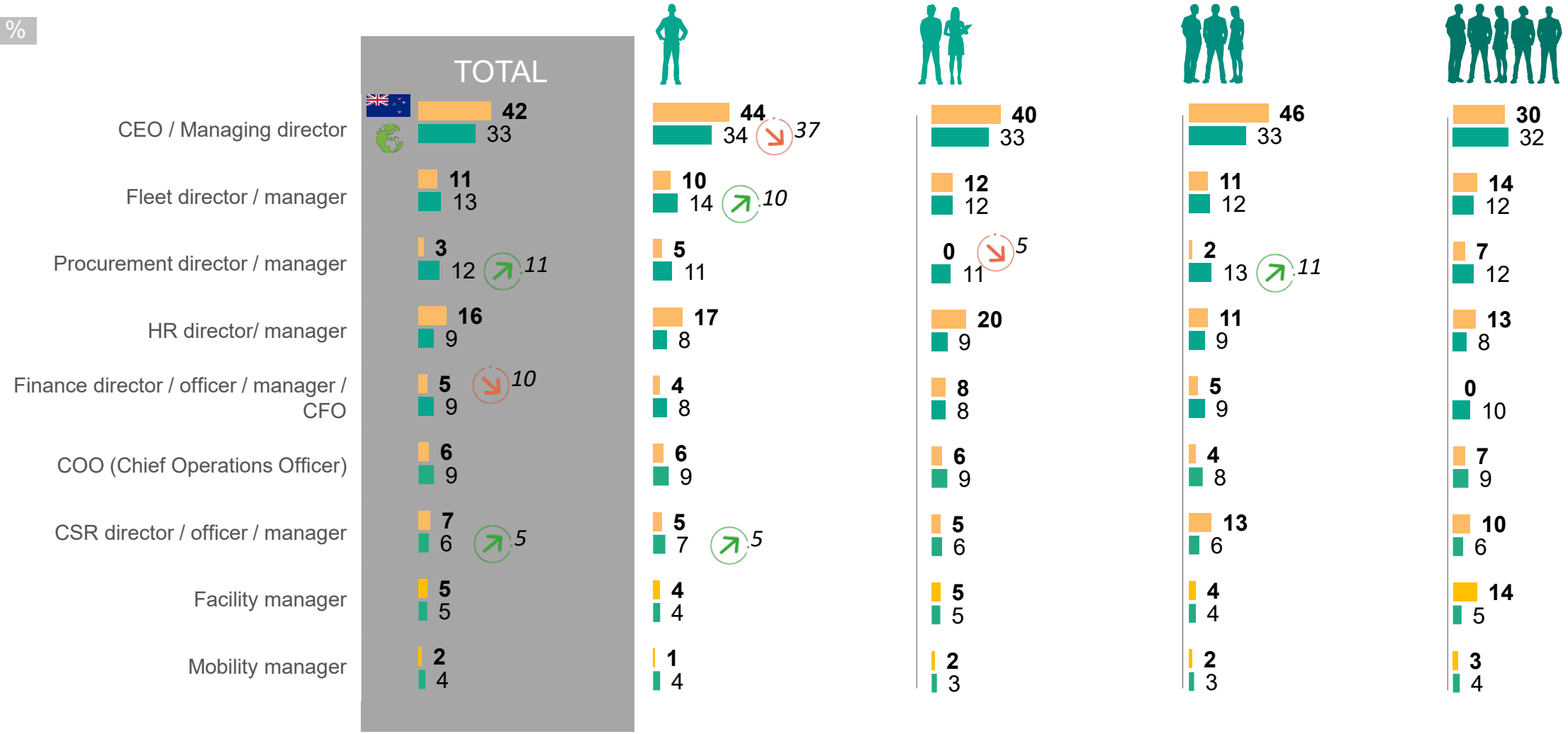
NET ARE AWARE OF MOBILITY SOLUTIONS
(Decision maker, influencer or informed)



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

POSITION OF THE PERSON WHO DECIDES ON MOBILITY SOLUTIONS

In %



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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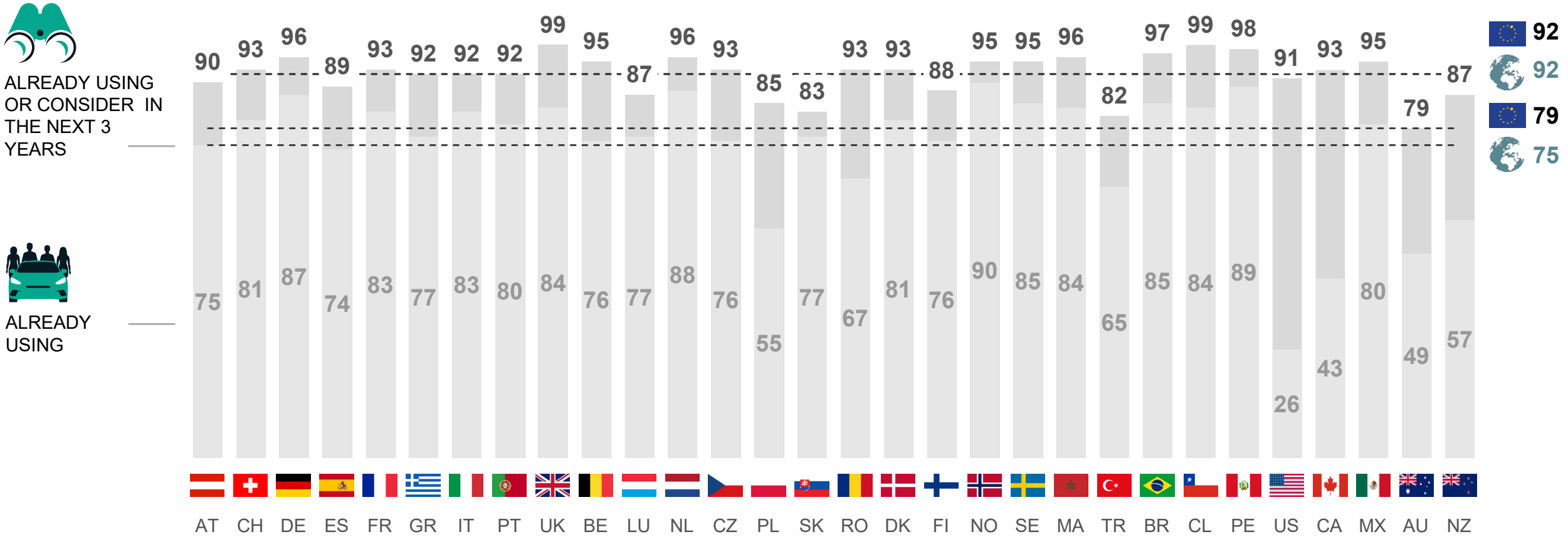
MOBILITY SOLUTIONS IMPLEMENTATION

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 %



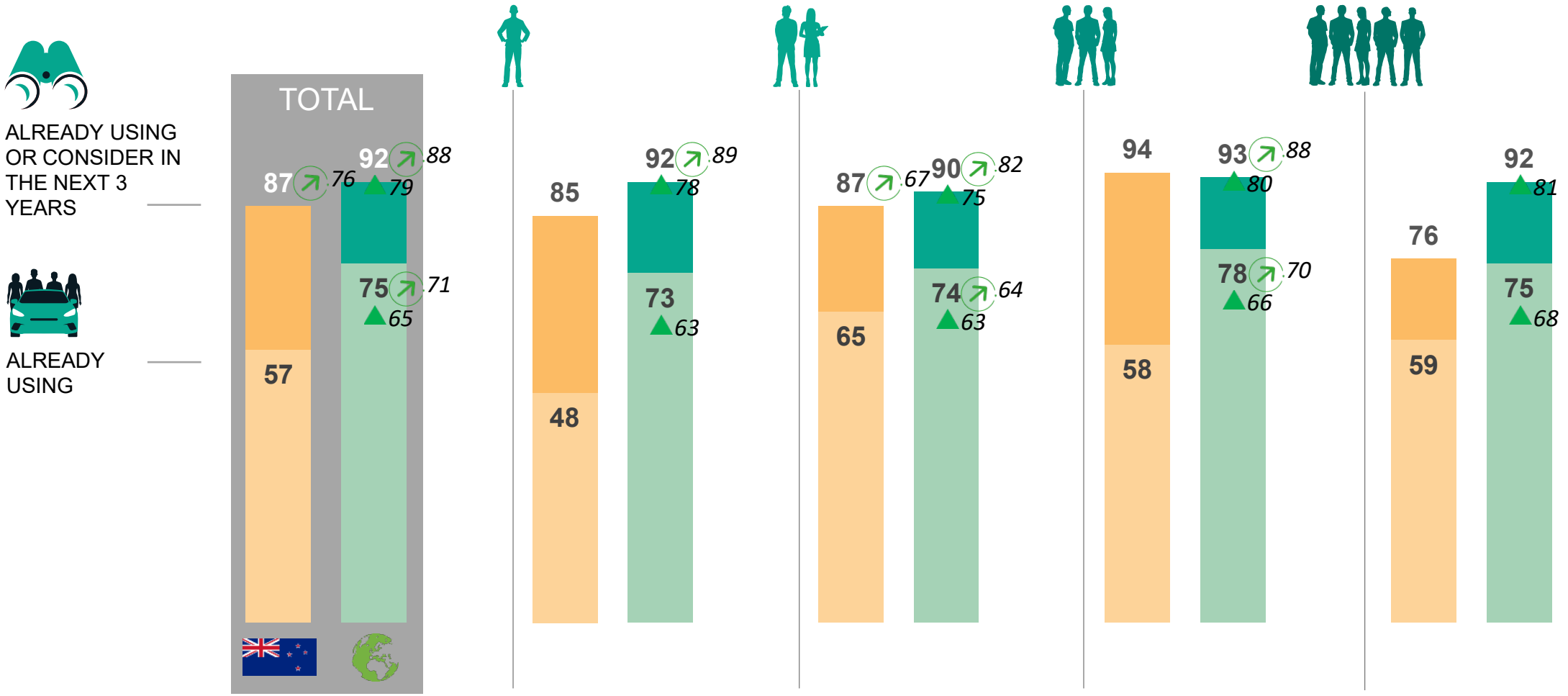
Which of the following have you implemented, or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions

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MOBILITY SOLUTIONS IMPLEMENTATION

At least one already implemented

In %



XX Significantly higher than 2023 year

XX Significantly higher than 2022 year

XX = score 2023 or 2022

XX Significantly lower than 2023 year

XX Significantly lower than 2022 year

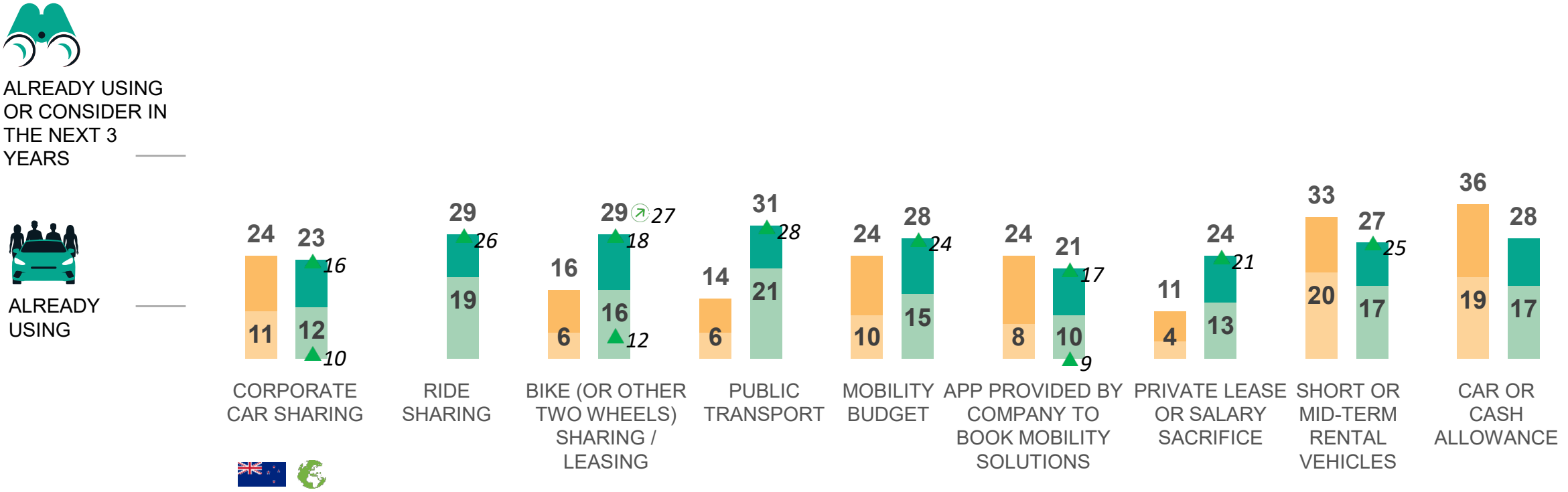
XX = score 2023 or 2022

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

OVERVIEW OF MOBILITY SOLUTIONS IMPLEMENTATION

57% 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

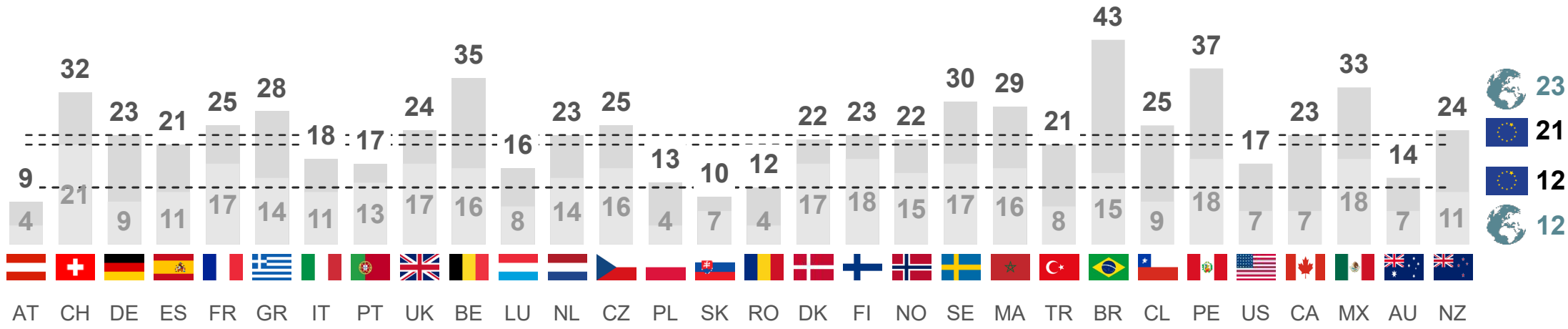
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CORPORATE CAR SHARING IMPLEMENTATION

In %

ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS

ALREADY USING

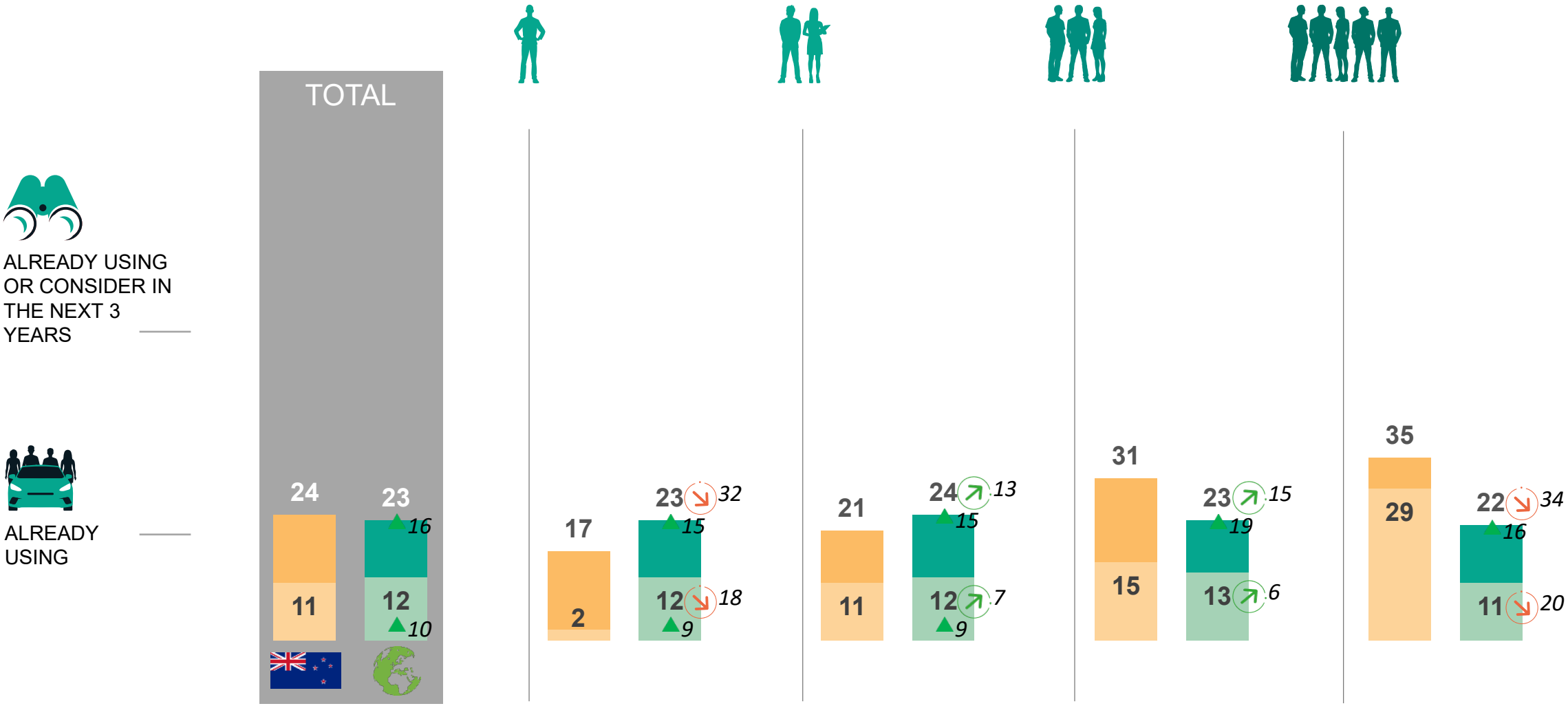


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CORPORATE CAR SHARING IMPLEMENTATION

In %

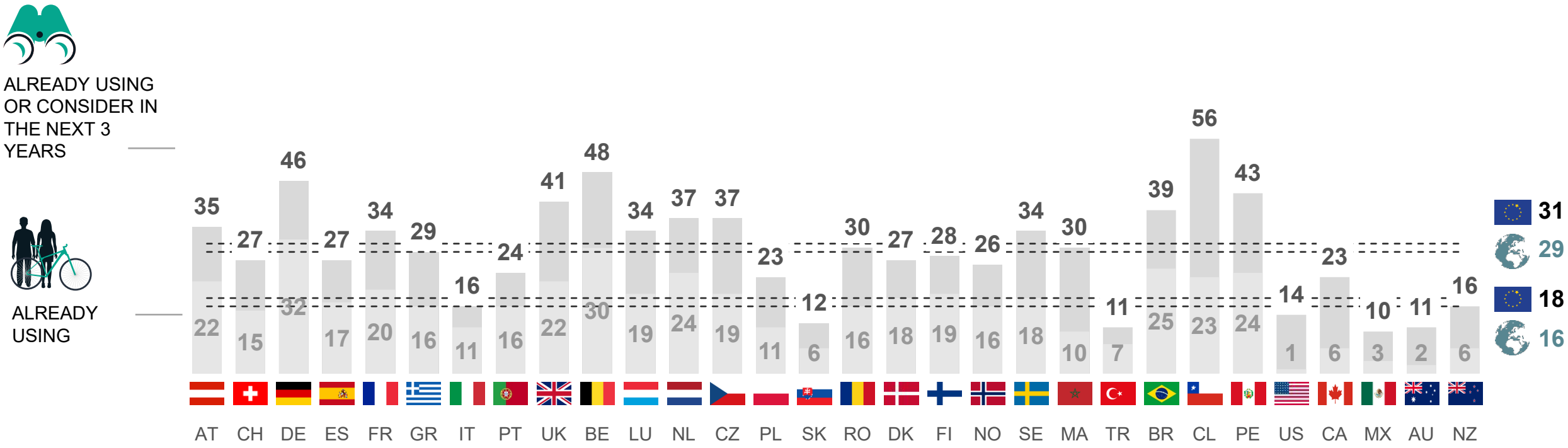


Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%

Question asked to respondents that are aware of mobility solutions

BIKE (OR OTHER TWO WHEELS) SHARING / LEASING IMPLEMENTATION

In %

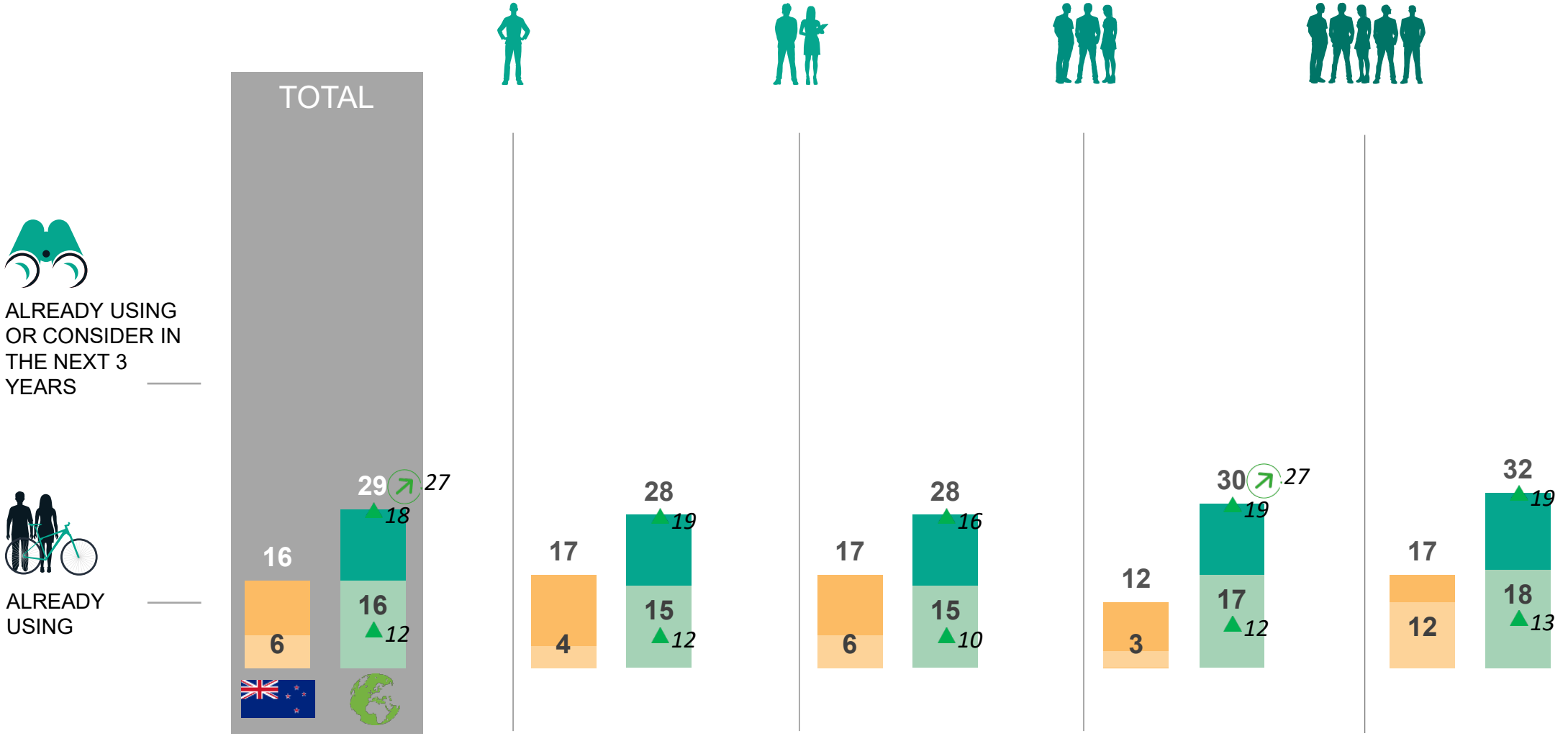


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Question asked to respondents that are aware of mobility solutions

BIKE (OR OTHER TWO WHEELS) SHARING / LEASING IMPLEMENTATION

In %

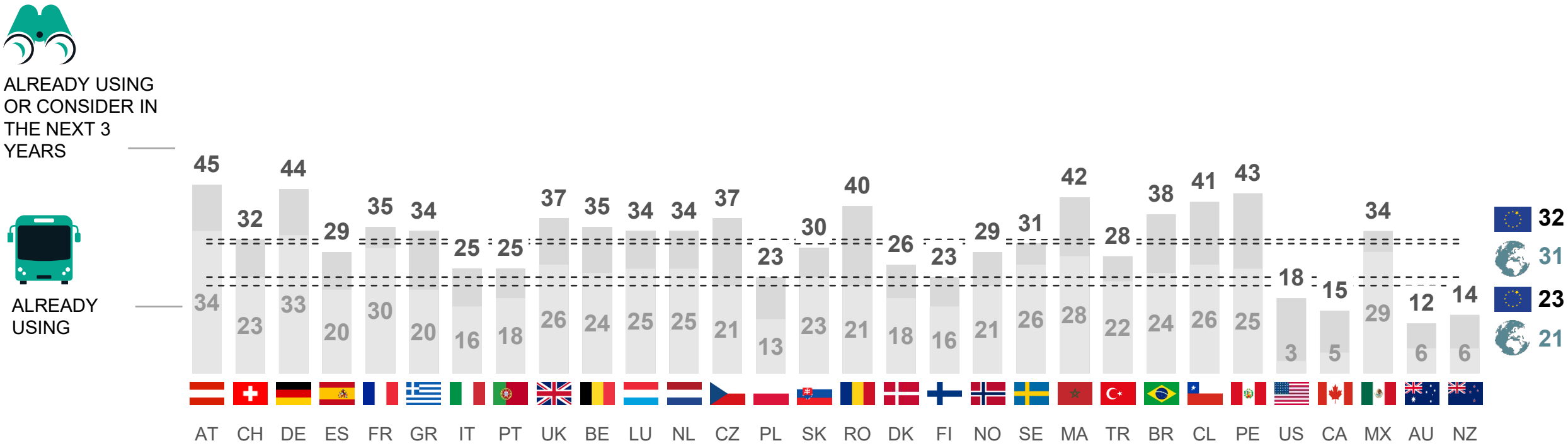


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Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions

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

PUBLIC TRANSPORT IMPLEMENTATION

In %



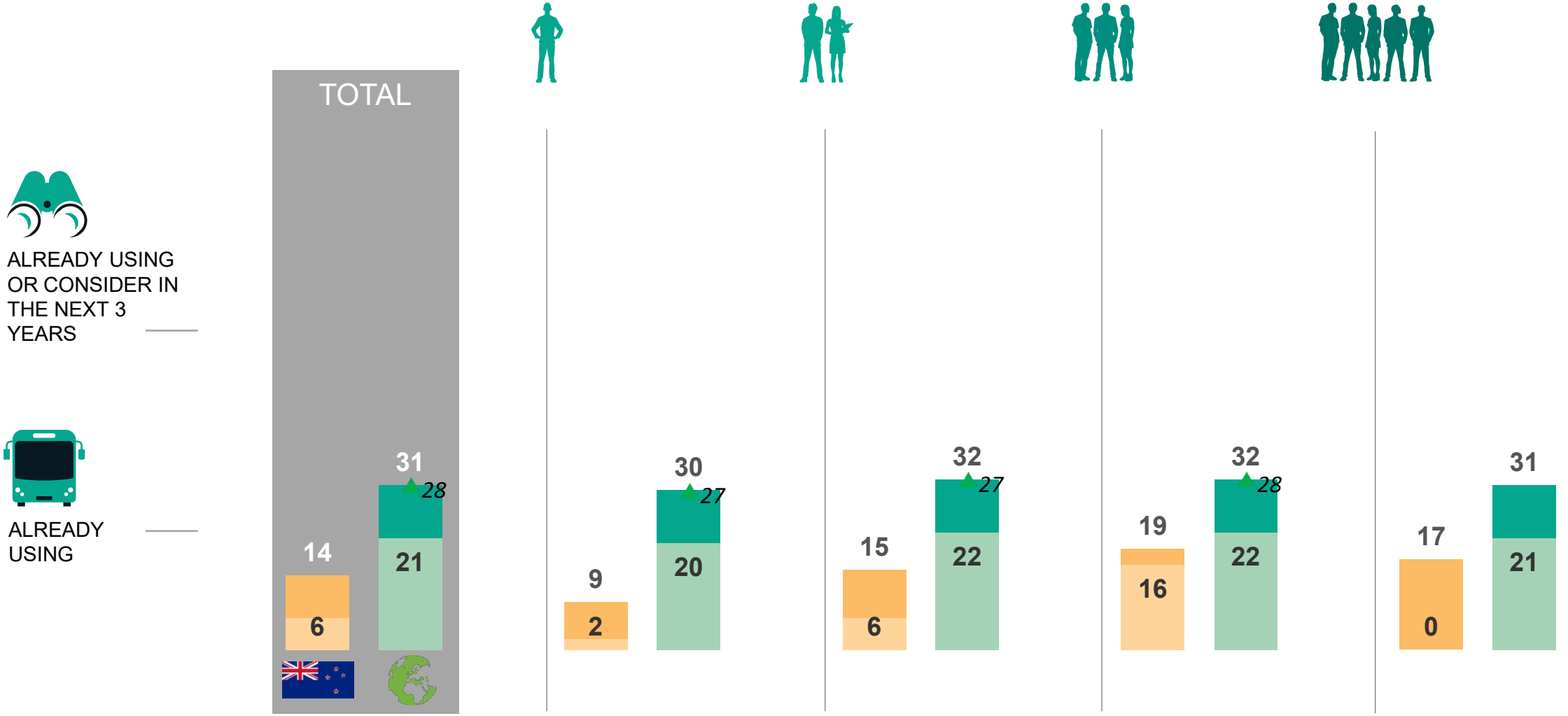
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Basis: companies with corporate vehicles = 100%

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 %



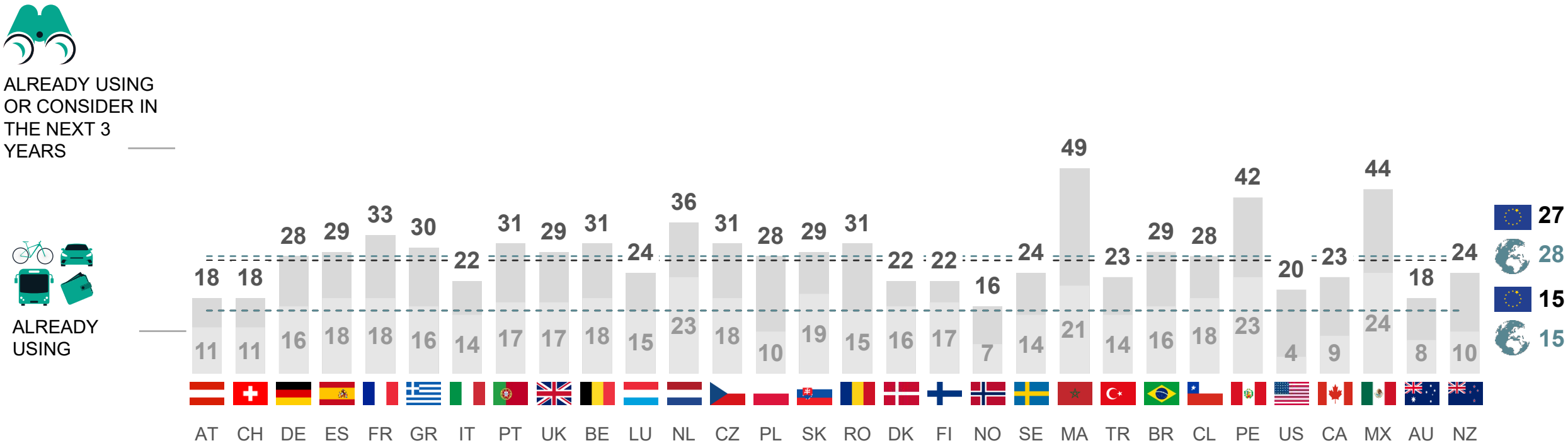
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Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%

Question asked to respondents that are aware of mobility solutions

Arval Mobility Observatory
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ELEMENT-ARVAL GLOBAL ALLIANCE

MOBILITY BUDGET IMPLEMENTATION

In %

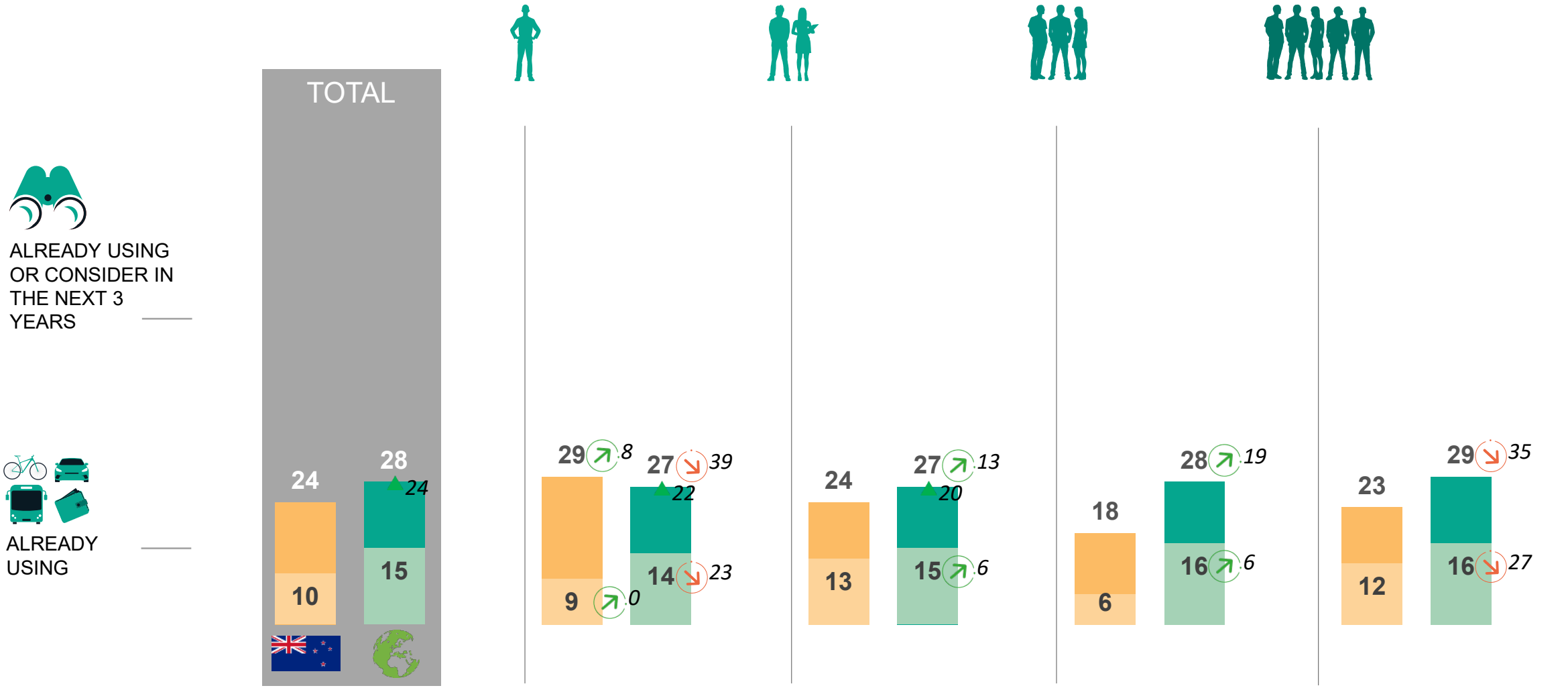


Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions

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

MOBILITY BUDGET IMPLEMENTATION

In %



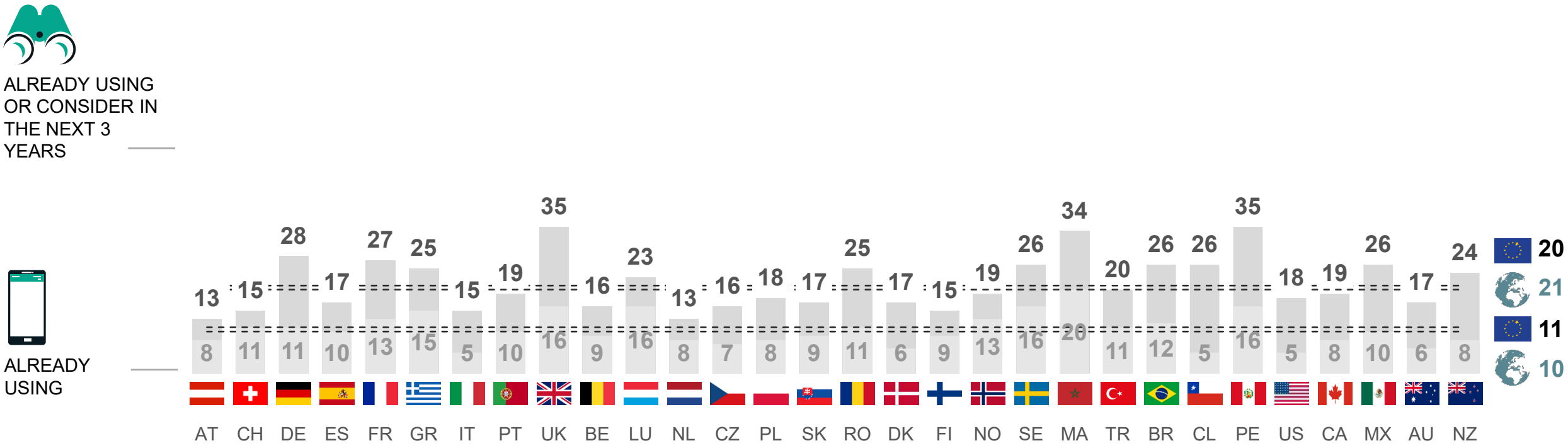
Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%

Question asked to respondents that are aware of mobility solutions

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

AN APP PROVIDED BY THE COMPANY TO BOOK MOBILITY SOLUTIONS

In %

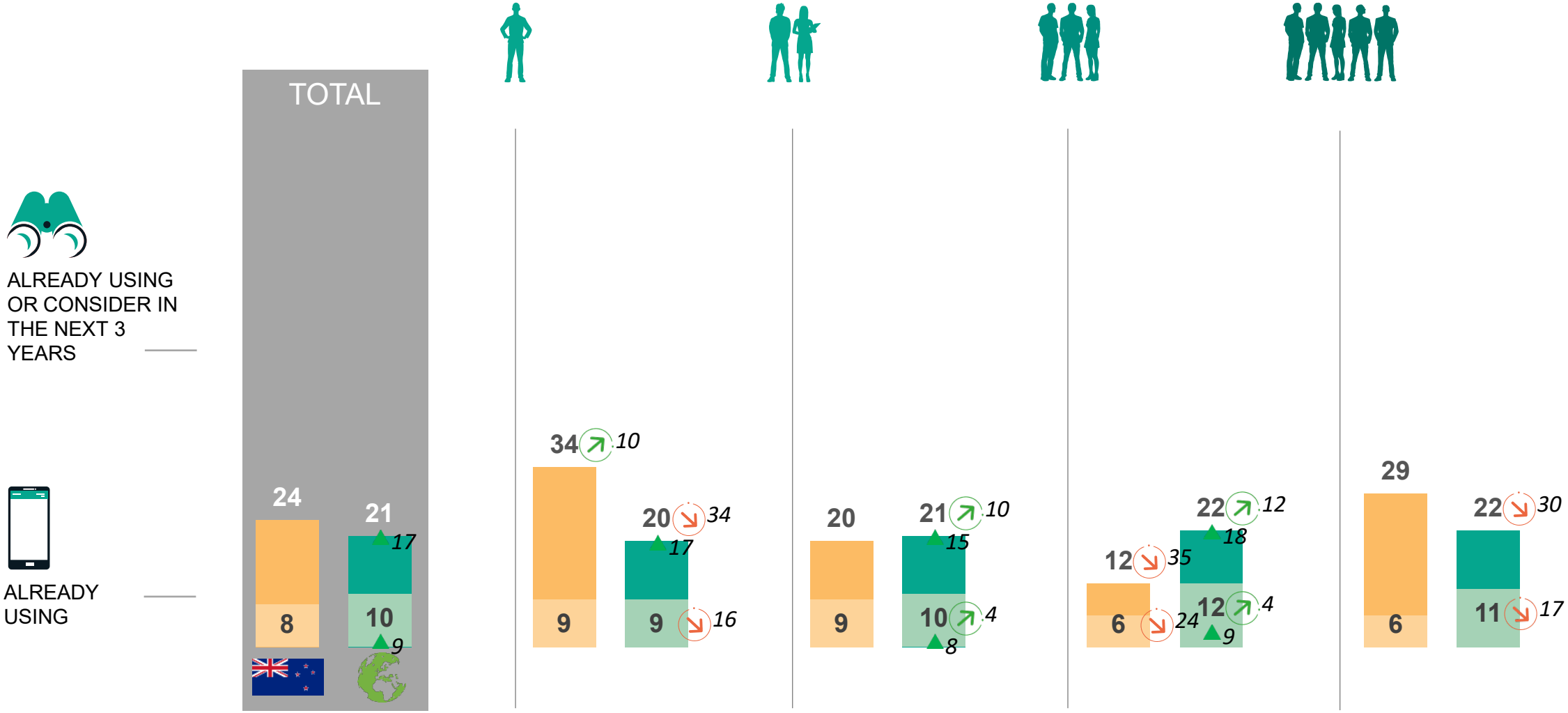


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Basis: companies with corporate vehicles = 100%

Question asked to respondents that are aware of mobility solutions

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In %

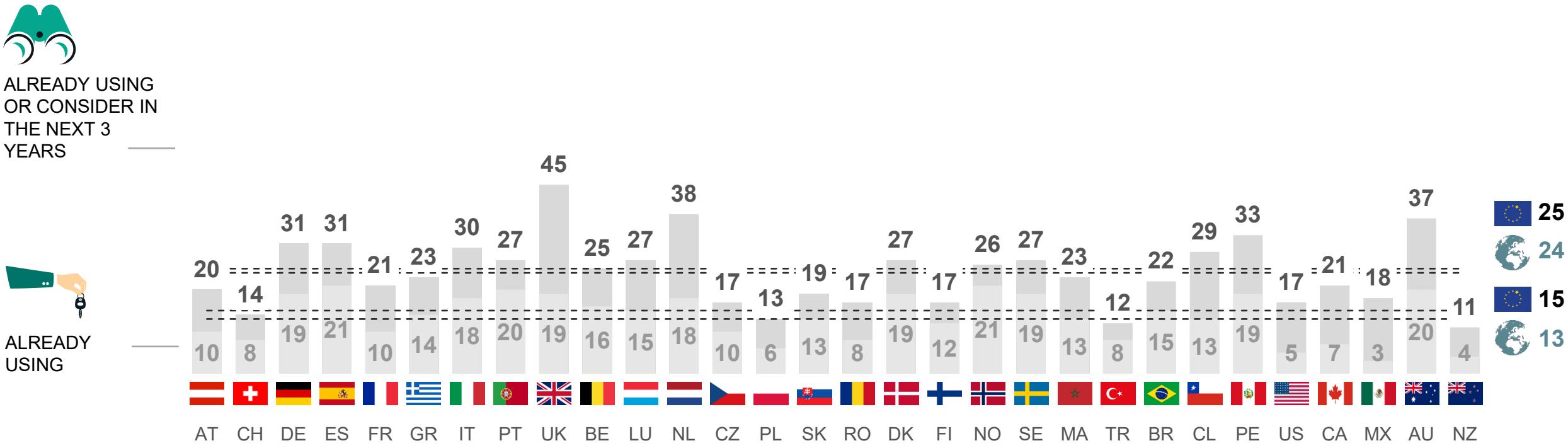


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Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions

Arval Mobility Observatory
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PRIVATE LEASE OR SALARY SACRIFICE IMPLEMENTATION

In %



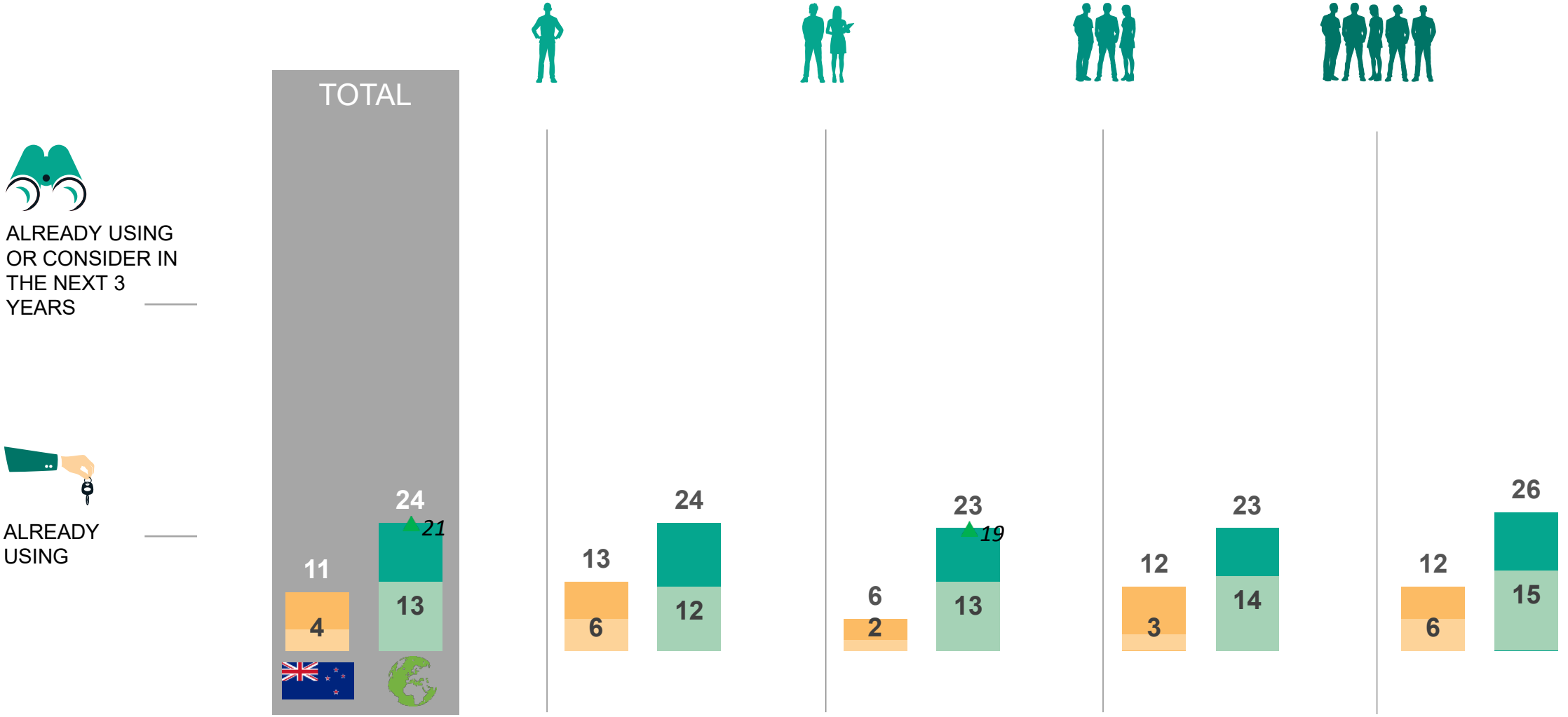
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Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%

Question asked to respondents that are aware of mobility solutions

Arval Mobility Observatory
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ELEMENT-ARVAL GLOBAL ALLIANCE

PRIVATE LEASE OR SALARY SACRIFICE IMPLEMENTATION

In %



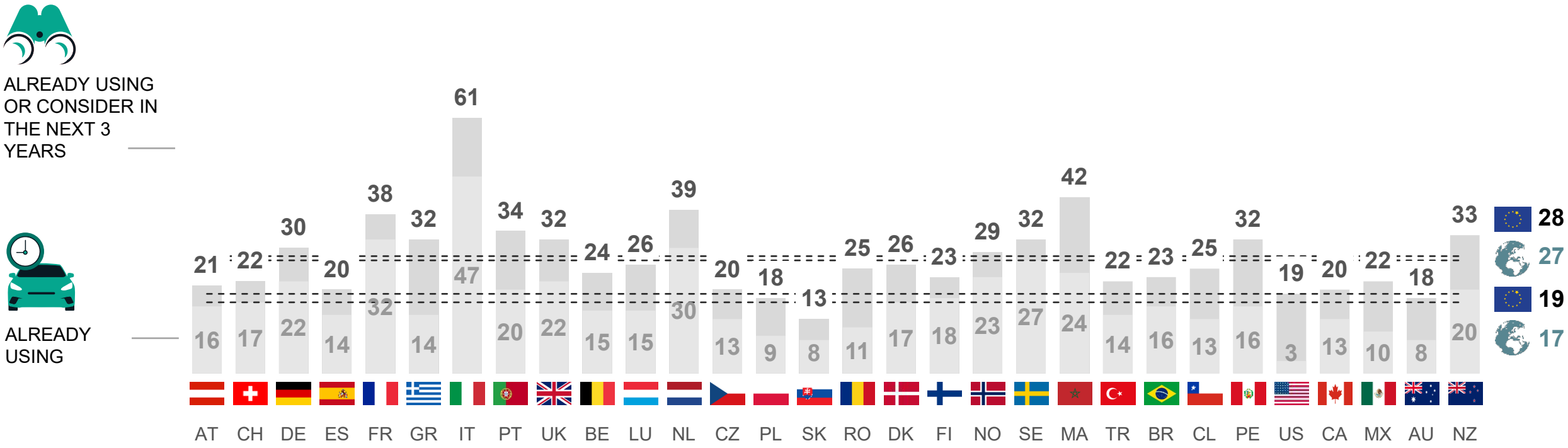
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Basis: companies with corporate vehicles = 100%

Question asked to respondents that are aware of mobility solutions

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SHORT OR MID-TERM RENTAL VEHICLES IMPLEMENTATION

In %

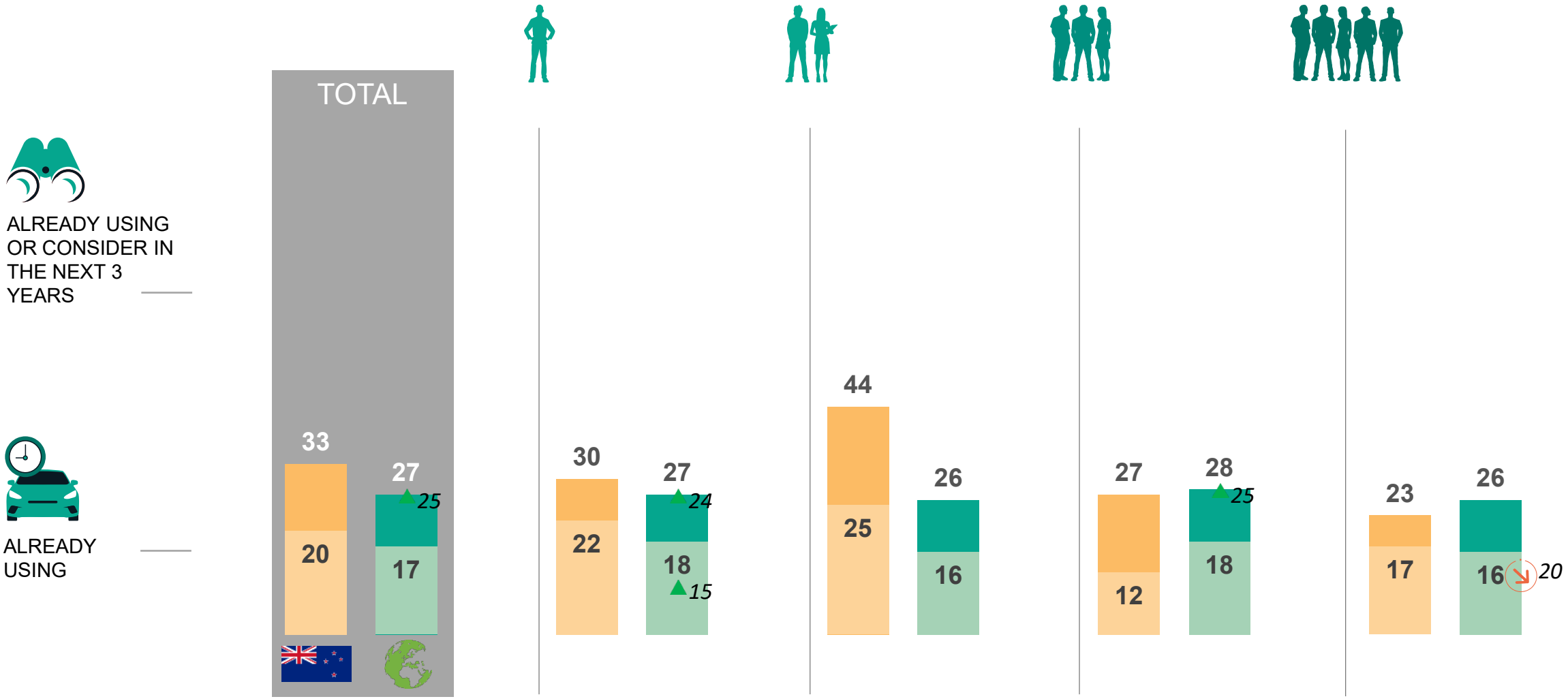


Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions

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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

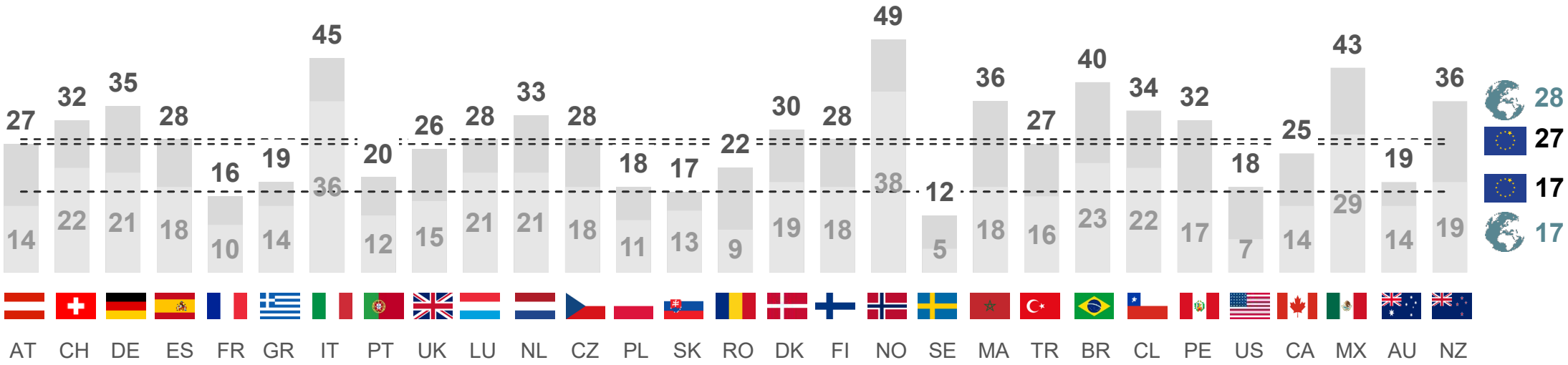
Arval Mobility Observatory
element | ARVAL BNP PARIBAS GROUP
ELEMENT-ARVAL GLOBAL ALLIANCE

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

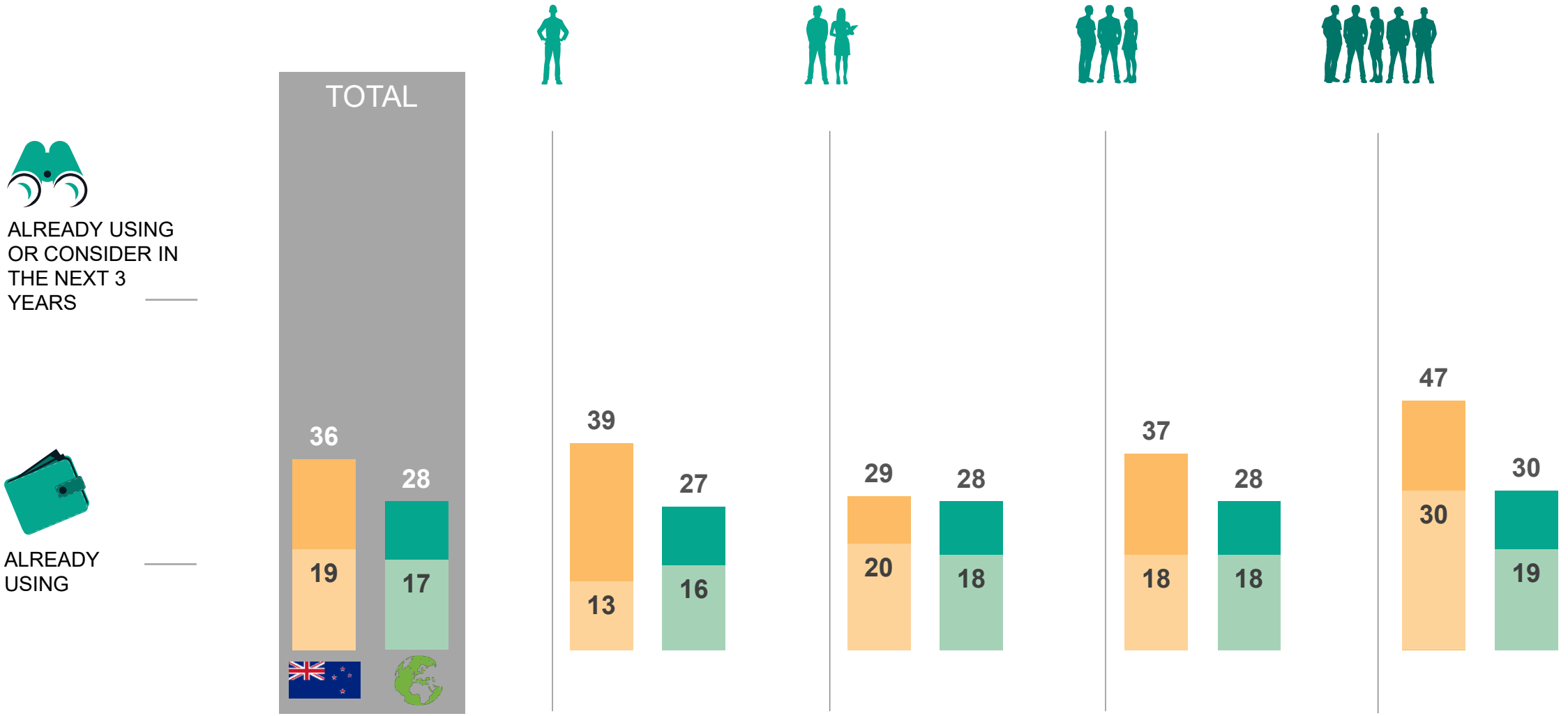
Arval Mobility Observatory

element | ARVAL BNP PARIBAS GROUP

ELEMENT-ARVAL GLOBAL ALLIANCE

CAR OR CASH ALLOWANCE IMPLEMENTATION

In %

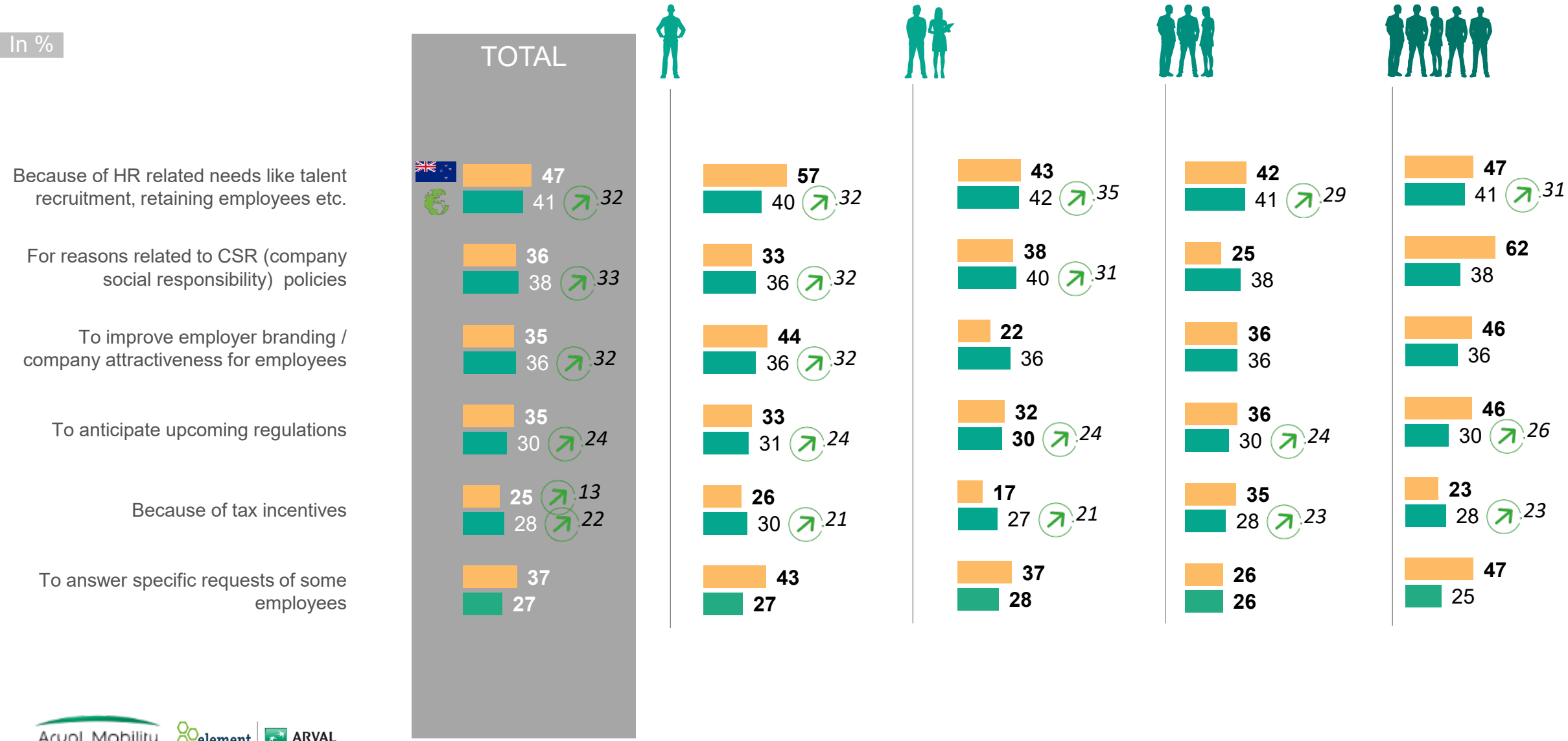


Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%

Question asked to respondents that are aware of mobility solutions

REASONS FOR IMPLEMENTING OR CONSIDERING MOBILITY SOLUTIONS

In %



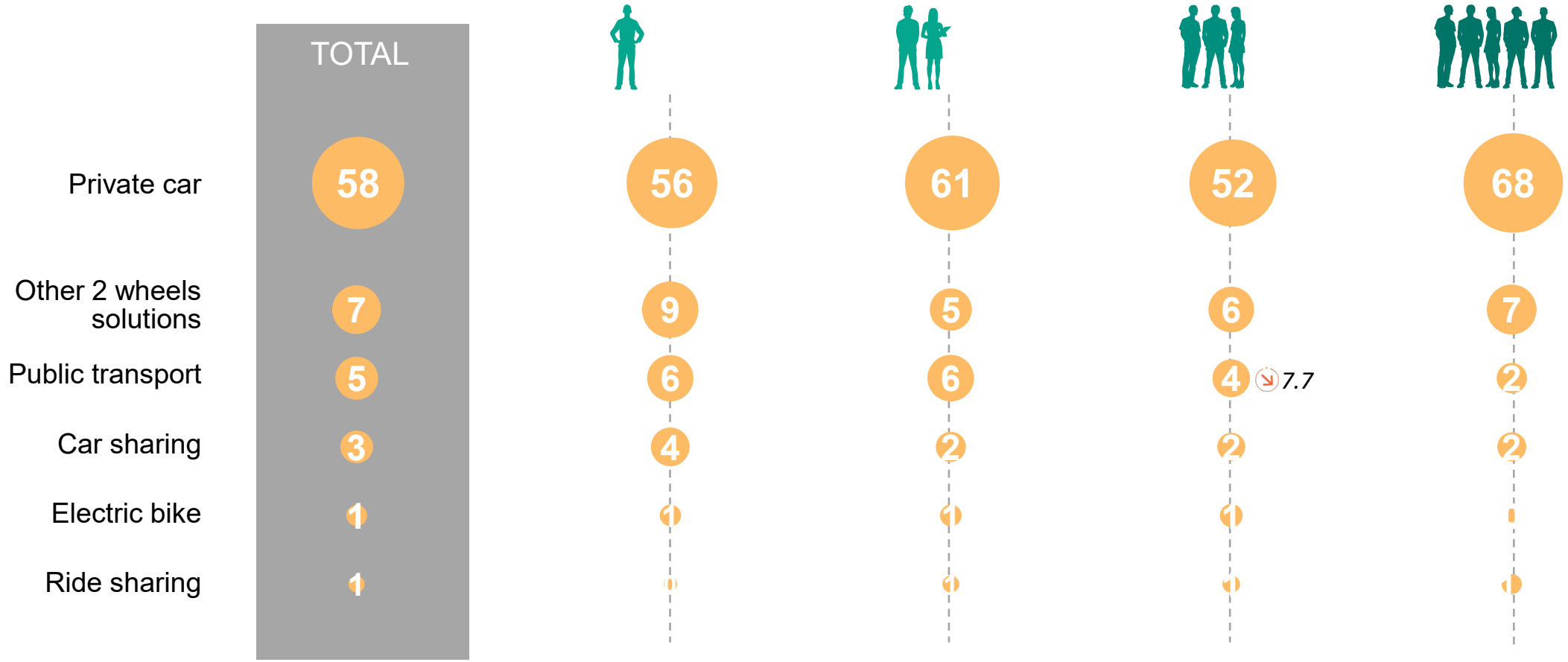
For what reasons has your company introduced or intends to introduce these mobility solutions?
Basis: companies introduced or intend to introduce at least one new mobility solution
Question asked to respondents that are aware of mobility solutions

MEANS OF COMMUTING TO WORK

HOW TO READ THE RESULTS?

In New Zealand, companies claim that on average, 58.22% of employees use private car to commute to the workplace

In %

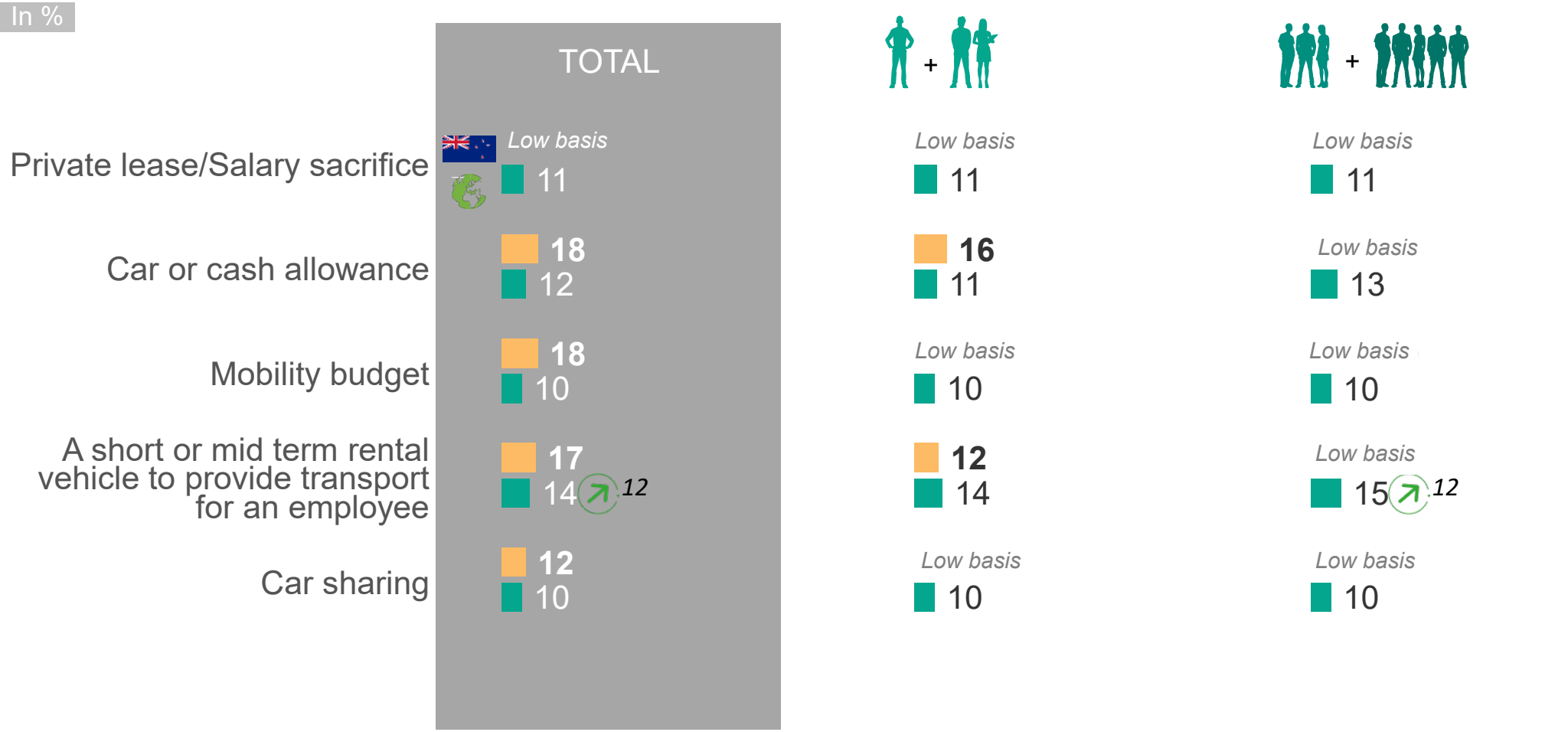


What percentage of your employees use each of the following means of transportation to go to the workplace ?
Basis: companies with corporate vehicles = 100%

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

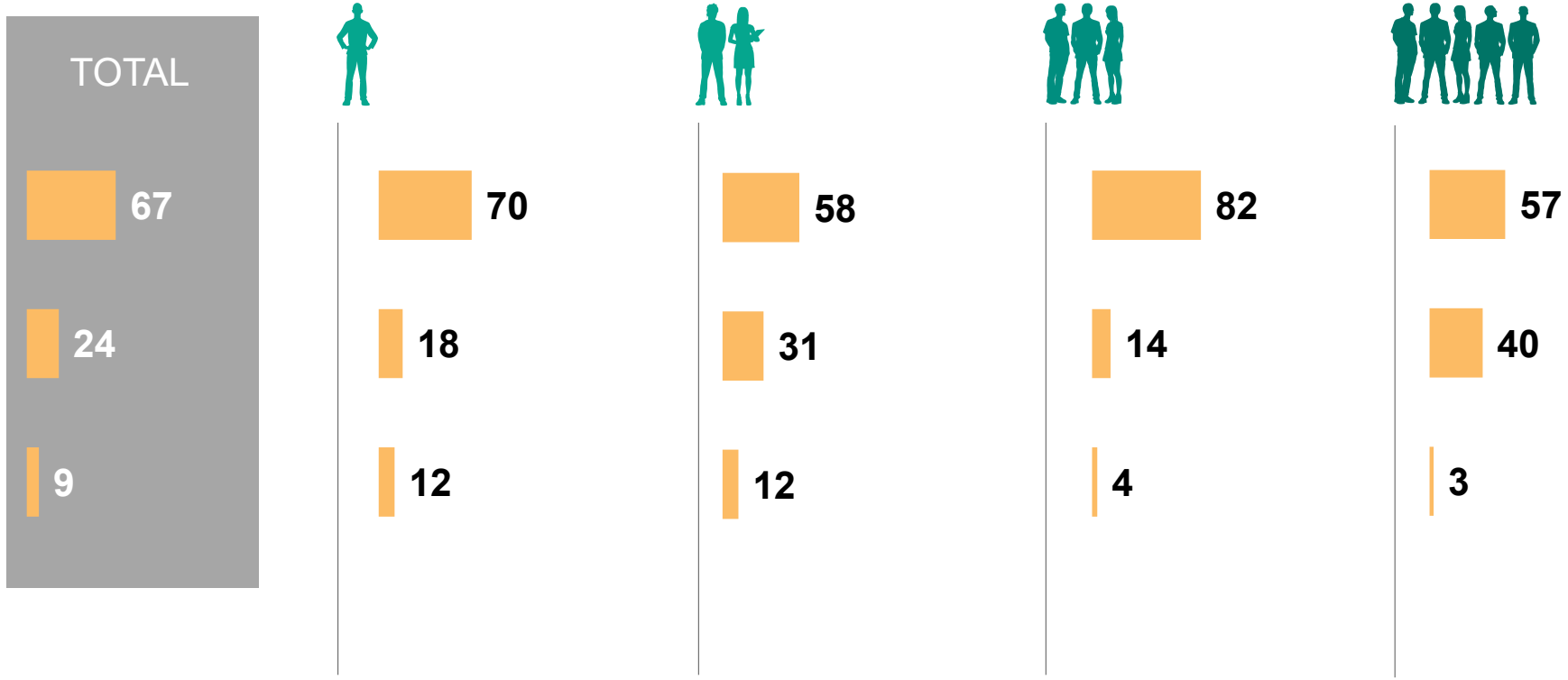
Question asked to respondents that are aware of mobility solutions

Arval Mobility Observatory
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ELEMENT-ARVAL GLOBAL ALLIANCE

MAIN REASON TO PROVIDE COMPANY CARS TO EMPLOYEES

In %

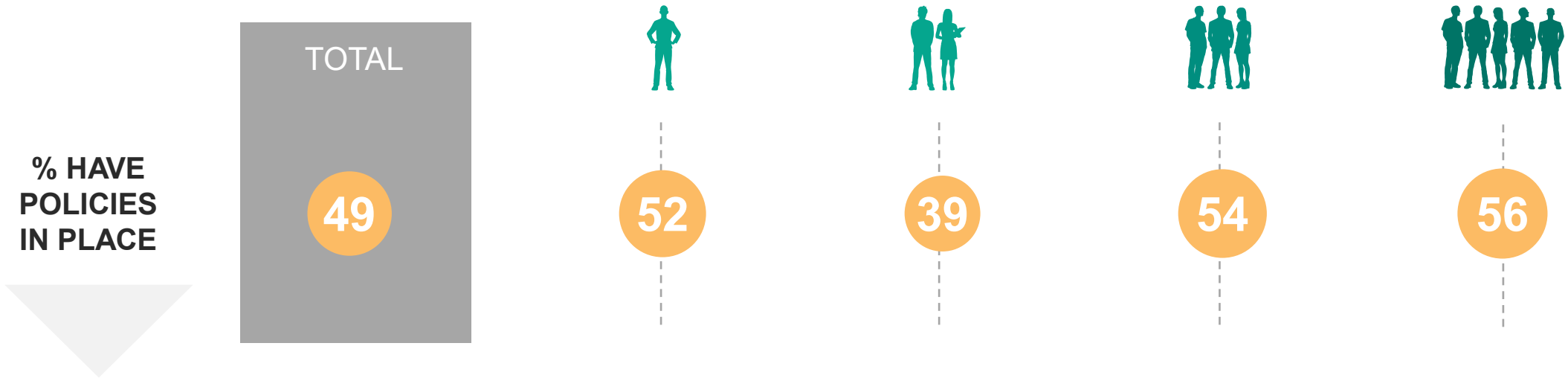
Passenger cars



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

POLICIES FOR PERSONAL CARS USED ON BUSINESS

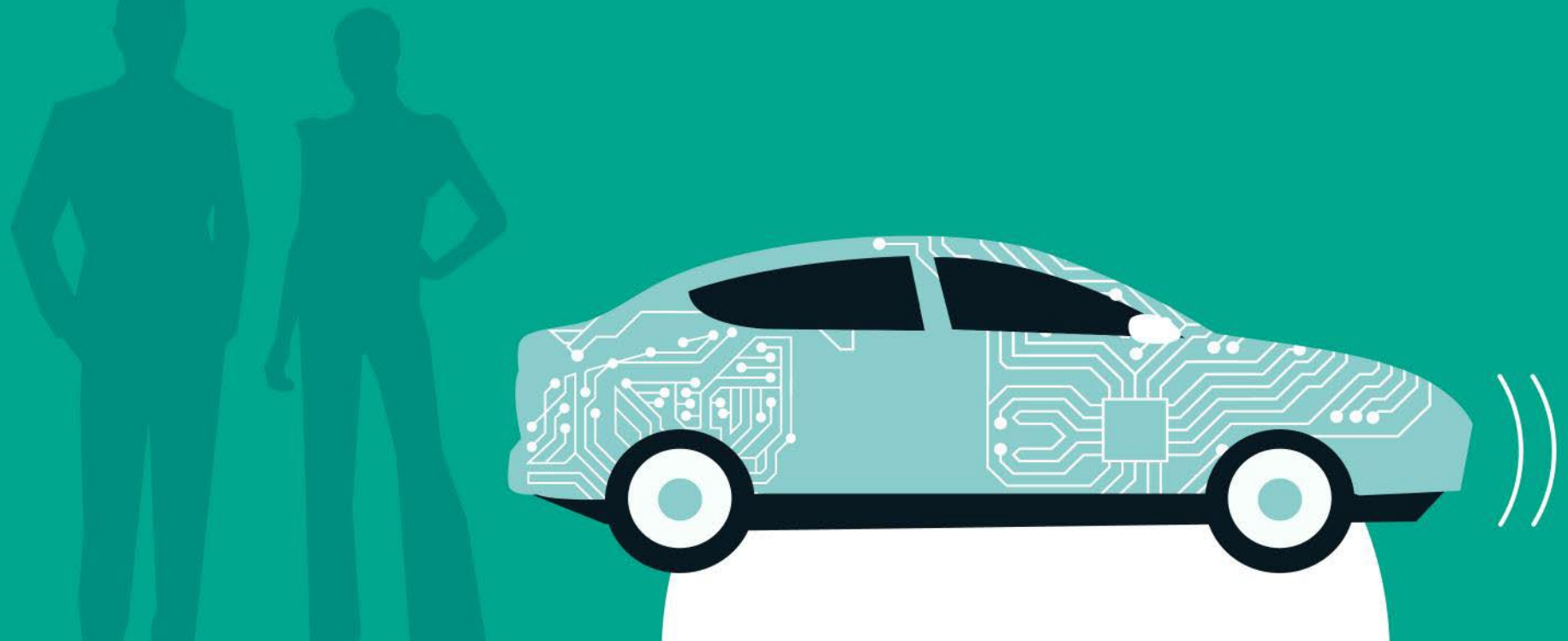
In %



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

7

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



CONNECTED VEHICLES USAGE IS STILL SOMEHOW LIMITED, DATA USAGE BEING IN LINE WITH GLOBAL PICTURE

1. **3 out of 10 companies use connected vehicles**, below the 40% global average.

2. **6 out of 10 companies are already using or consider using the data coming from the vehicle box thanks to a telematics platform** in the next 3 years. 1 out of 5 companies is currently using the data. This is in line with the global picture.

The picture is quite the same for passenger cars and for LCVs.

CONNECTED VEHICLES



USE OF CONNECTED VEHICLES

30%

40%



USE OF TELEMATICS DATA

Already using

20%

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 ?

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

15% use connected vehicles for passenger cars, while 20% use connected vehicles for LCVs.

	ALL VEHICLES	Passenger cars	LCVs
	30	15	20
	40	22	25

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

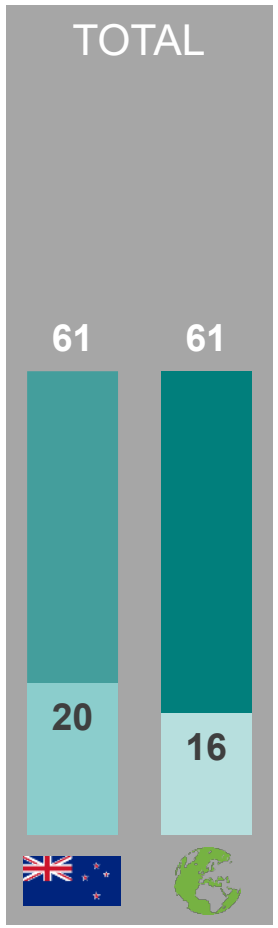
All vehicles

In %

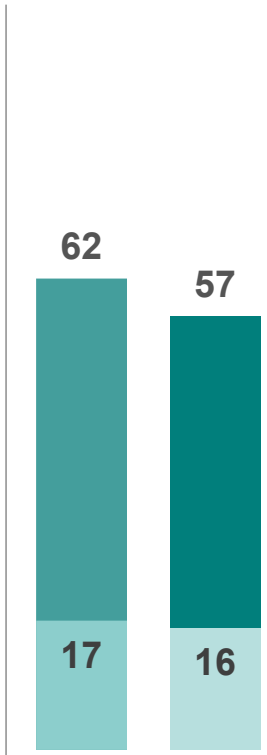
Passenger cars + LCVs

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

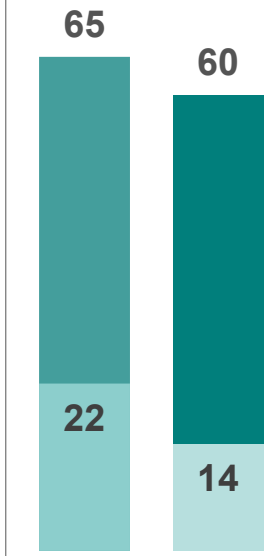
ALREADY USING



Passenger cars



LCVs



HOW TO READ THE RESULTS ?

61% 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.
20% of companies are currently using the data.

New question added in 2024

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

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

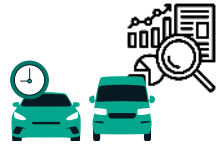
All vehicles

In %

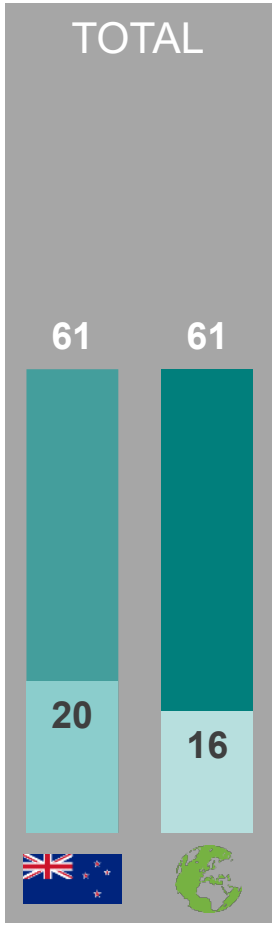
Passenger cars + LCVs

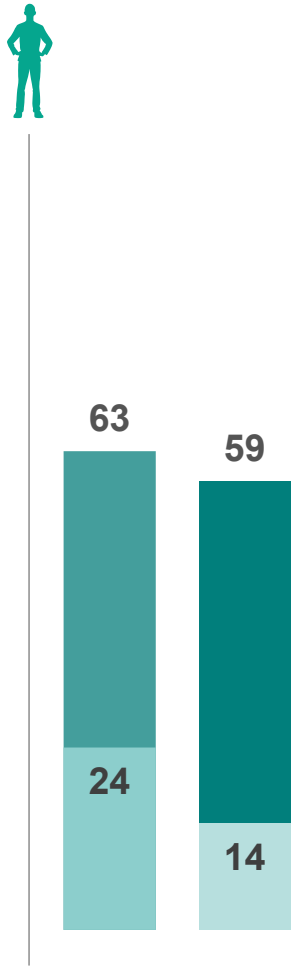


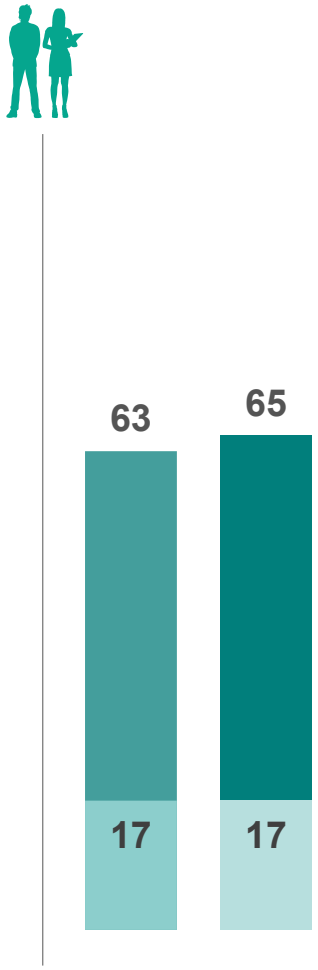
ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

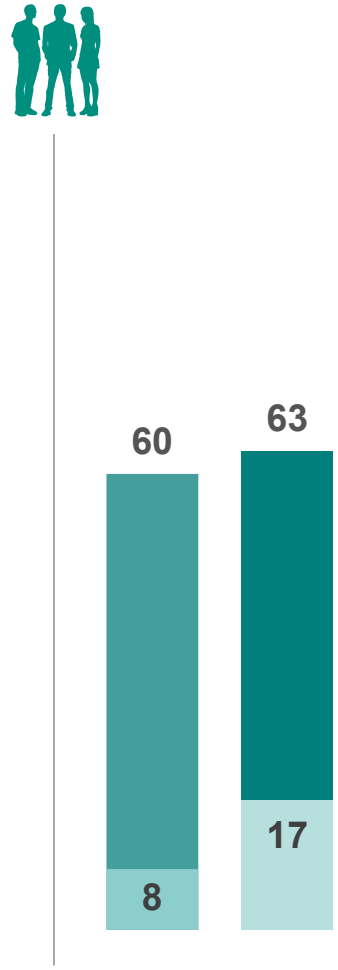


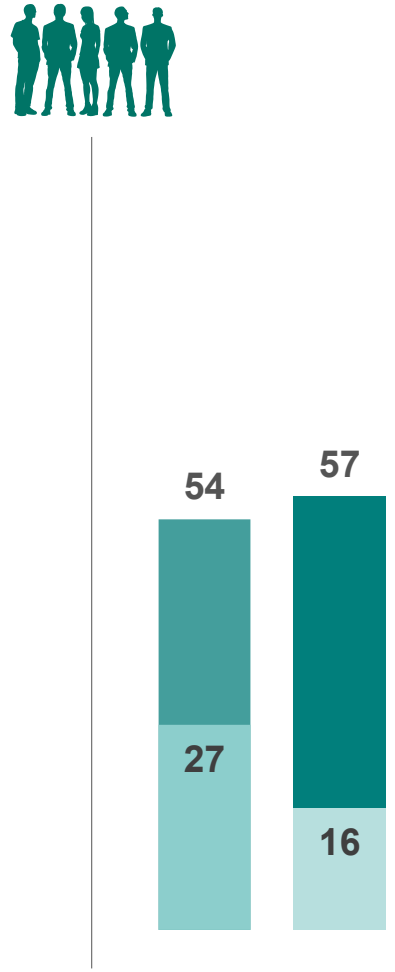
ALREADY USING











New question added in 2024

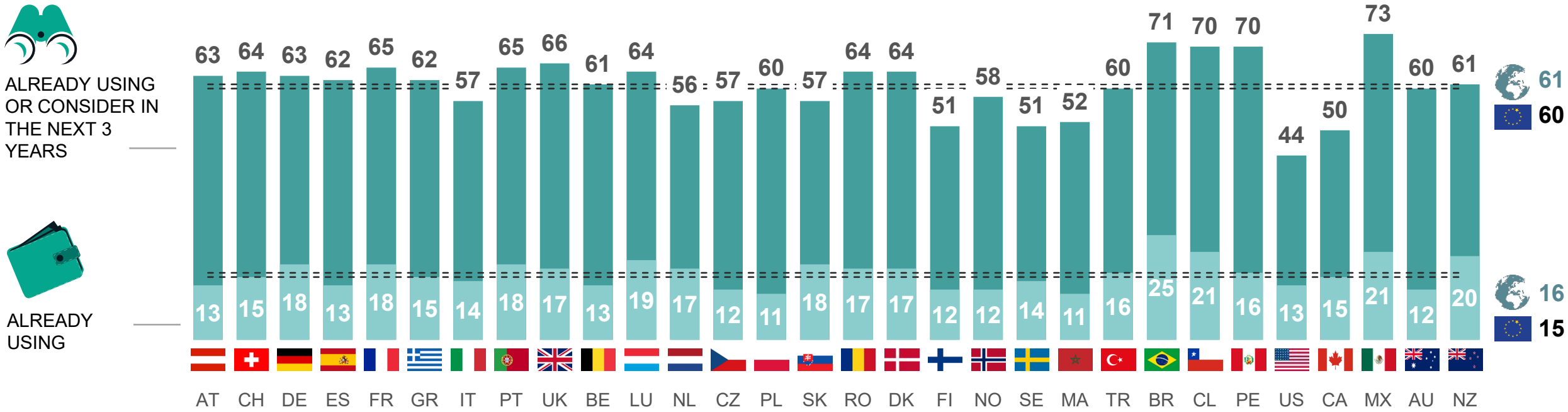
Do you use or consider using the data coming from the vehicle box thanks to a telematics platform ?
Basis: companies with a fleet using connected vehicles for all or part of their fleet.

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

All vehicles

In %

Passenger cars + LCVs



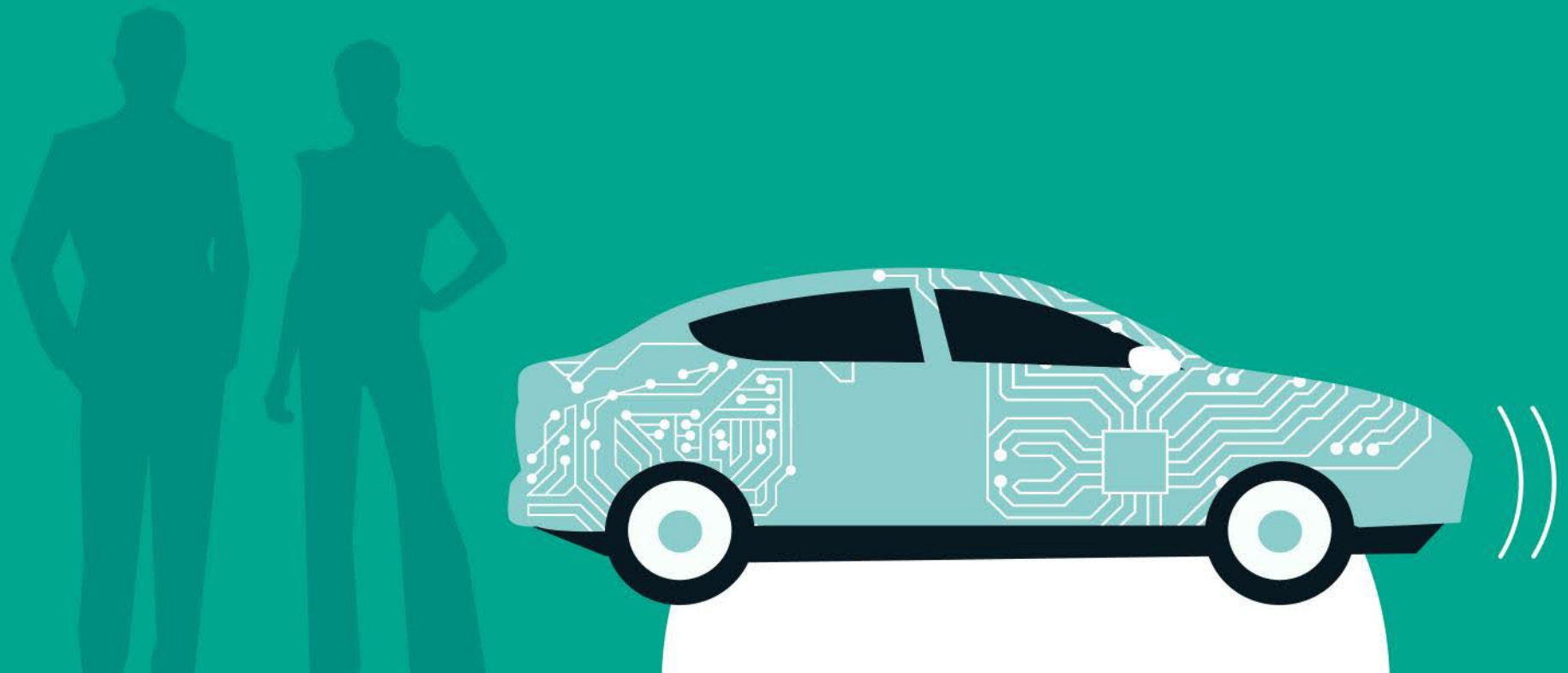
New question added in 2024

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

7

CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY

A. PASSENGER CARS



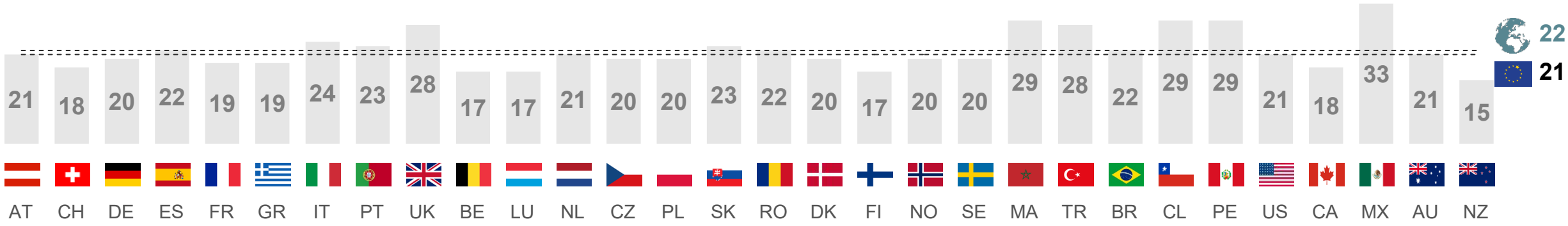
PROPORTION OF COMPANIES USING CONNECTED VEHICLES

Passenger cars

In %

Passenger cars

PROPORTION OF COMPANIES USING CONNECTED VEHICLES FOR THEIR PASSENGER CARS



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

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

Passenger cars

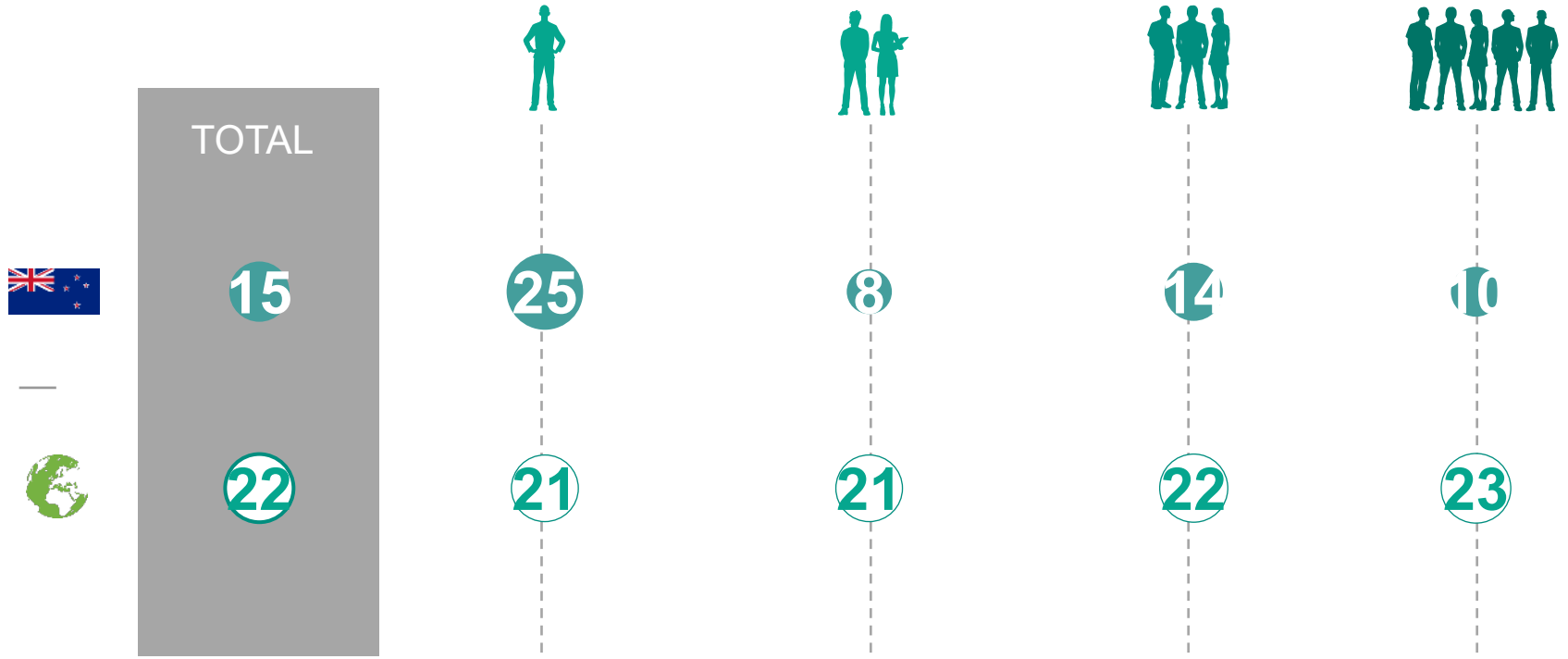
In %

Passenger cars

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

HOW TO READ THE RESULTS ?

15% use connected vehicles for passenger cars.



Change of definition in 2024. No comparison with 2023

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

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

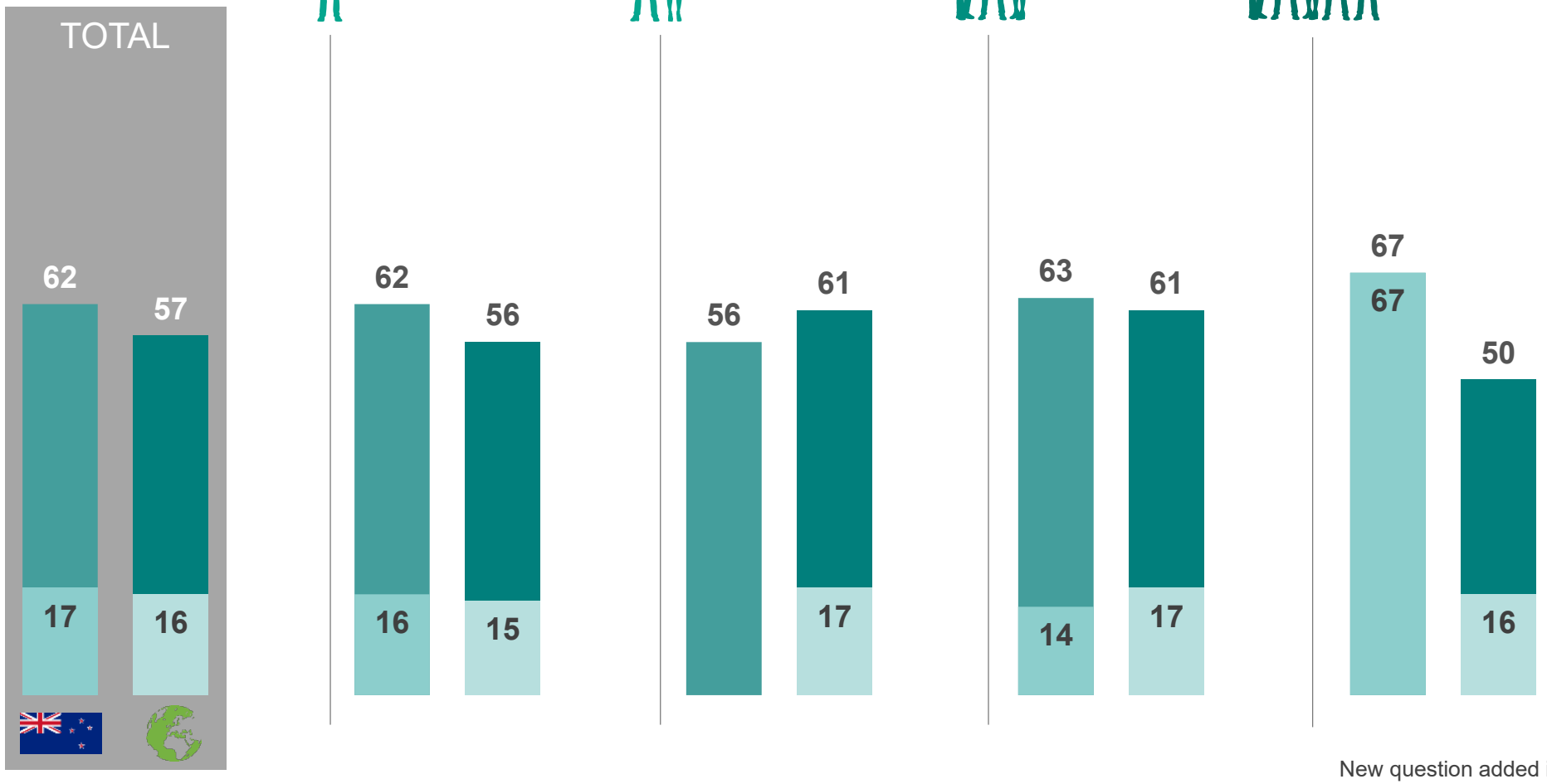
Passenger cars

In %

Passenger cars

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



New question added in 2024

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

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

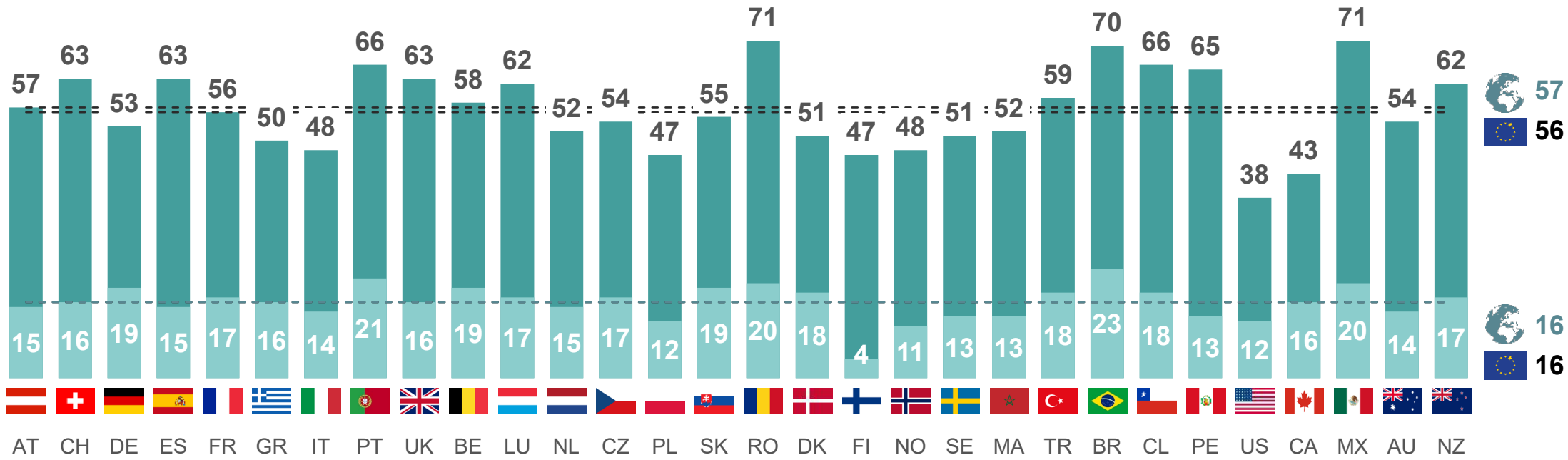
Passenger cars

In %

Passenger cars

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



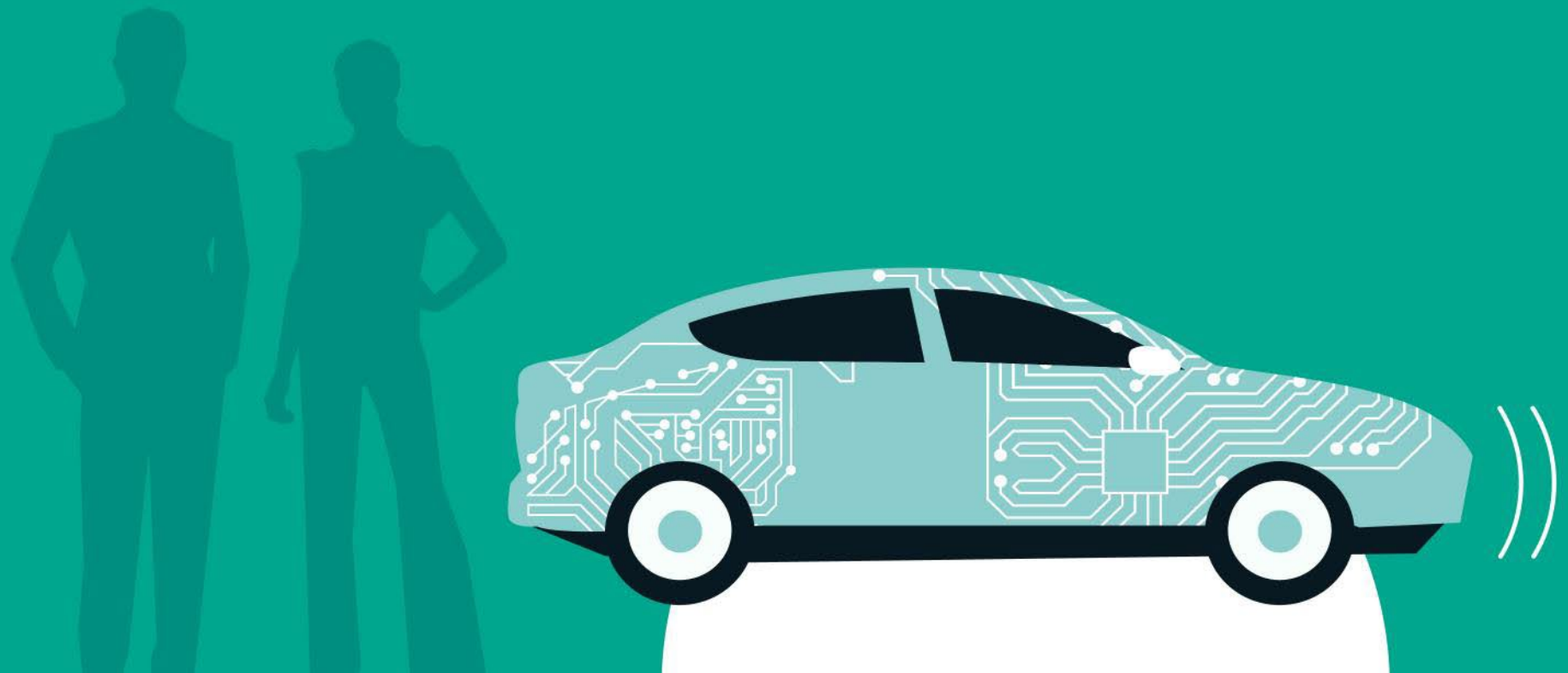
New question added in 2024

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

7

CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY

B. LCVs



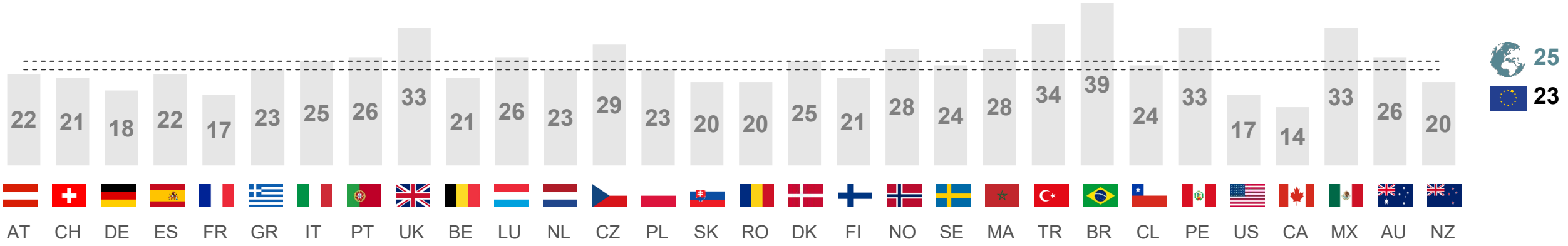
PROPORTION OF COMPANIES USING CONNECTED VEHICLES

LCVs

In %

LCVs

PROPORTION OF COMPANIES USING CONNECTED VEHICLES FOR THEIR LCVs



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

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

LCVs

In %

LCVs

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

HOW TO READ THE RESULTS ?

20% use connected vehicles for LCVs.



Change of definition in 2024. No comparison with 2023

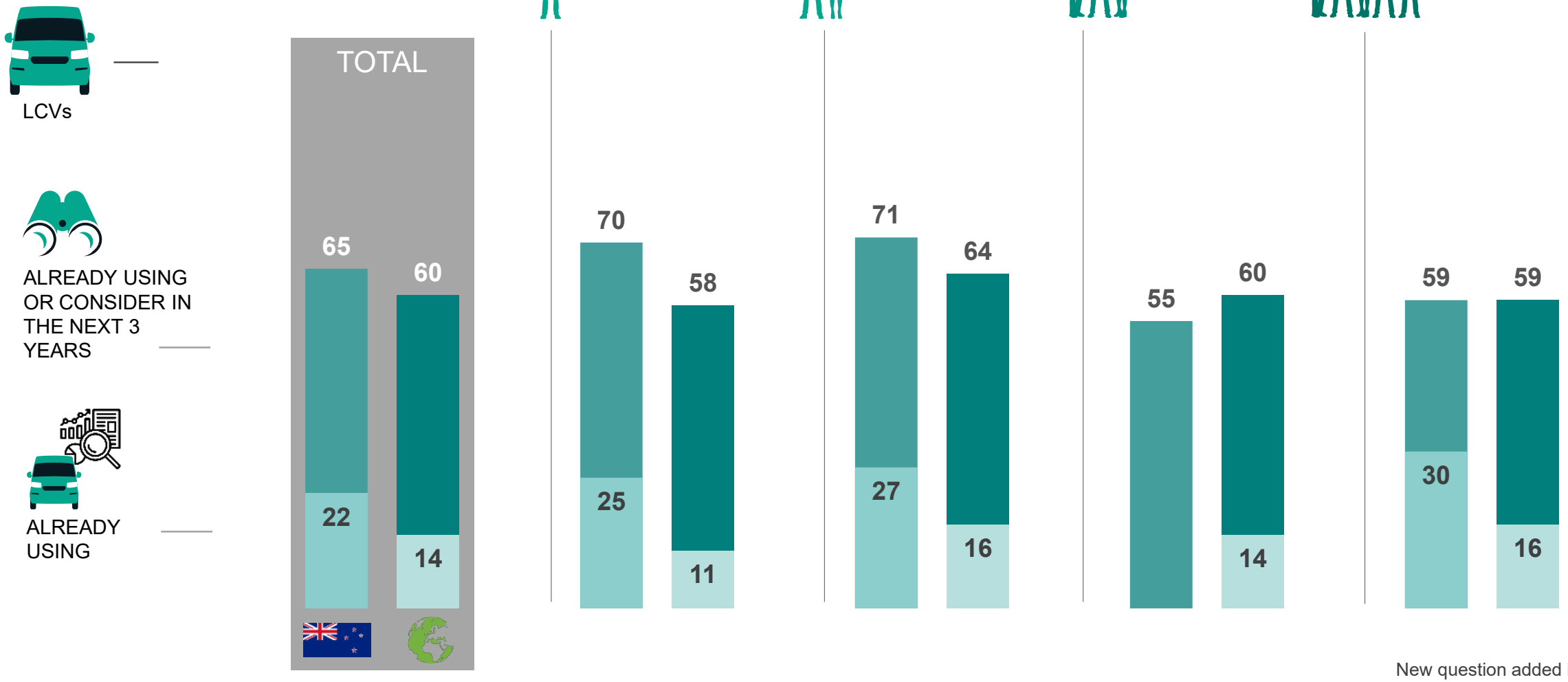
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Basis: companies with at least one LCV car in fleet

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 %



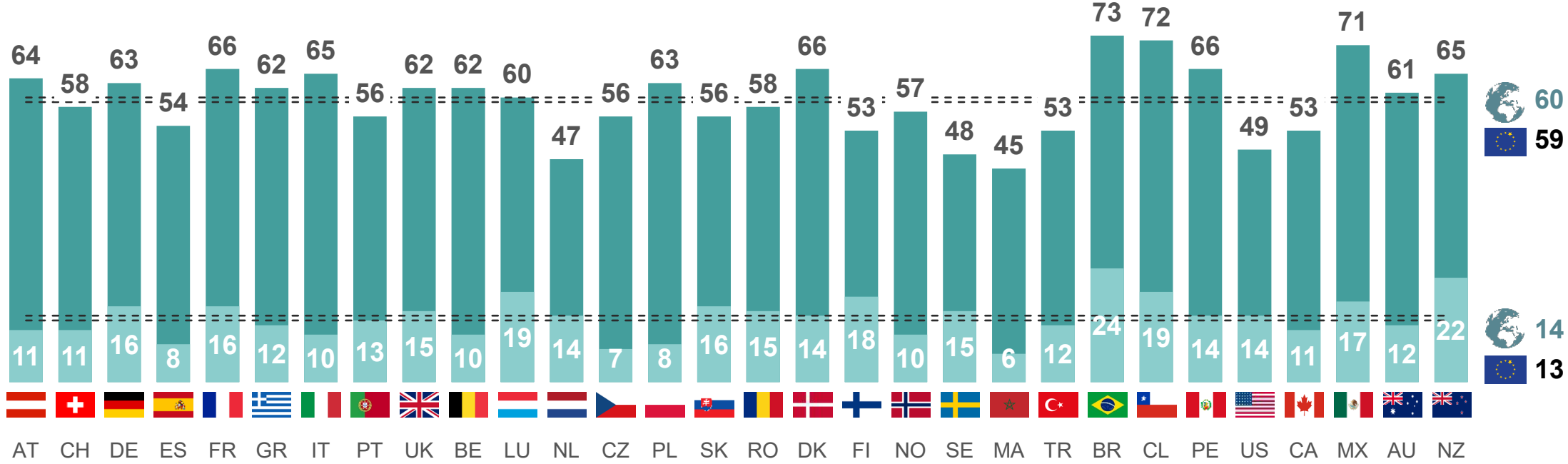
LCVs



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.

APPENDIX



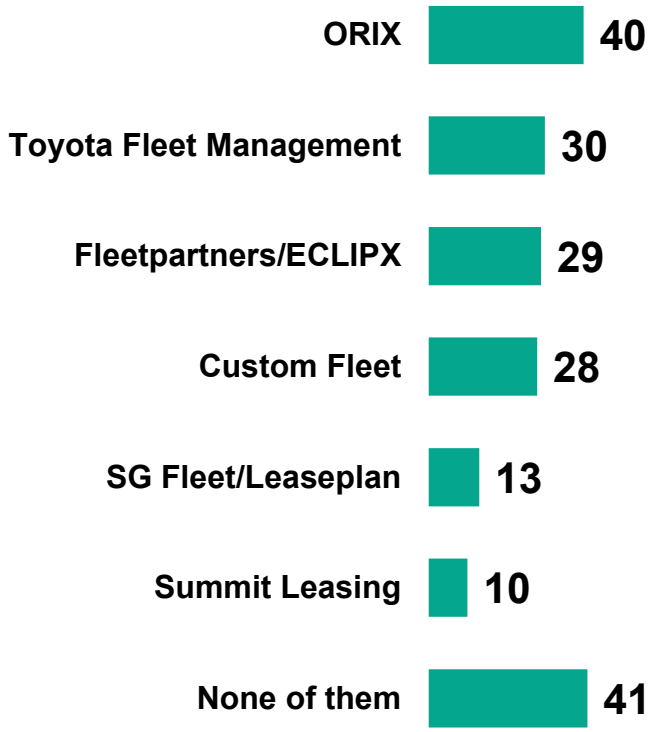


AWARENESS OF LEASING COMPANIES

In %

Passenger cars + LCVs





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

3 Brands on average

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


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

Thank you


Ipsos