

MOBILITY AND FLEET BAROMETER 2023

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1

CONTEXT AND METHODOLOGY





— 1

WHAT SHORT TERM
SHIFTS ARE SHAPING THE
MARKET?



— 2

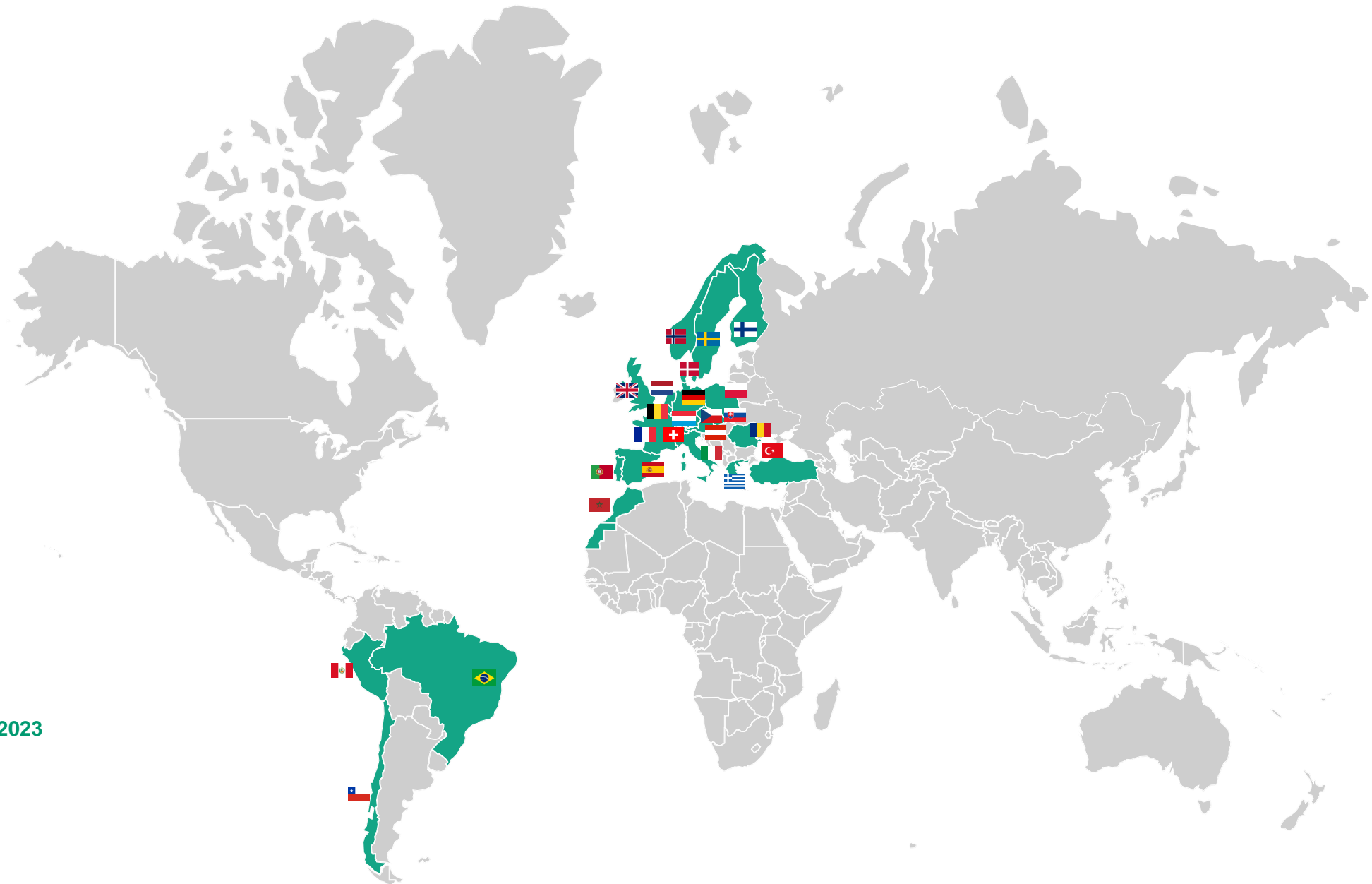
WHAT KIND OF VEHICLES
WILL THE MARKET
EXPECT IN 3 YEARS?



— 3

HOW DO MOBILITY
SOLUTIONS IMPACT
FLEET MANAGEMENT?

SCOPE OF THE SURVEY




























■ 25 countries in 2023

COMPANY SIZE SEGMENT DEFINITION

 WORLD

 EUROPE

 OUTSIDE EUROPE

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



METHODOLOGY

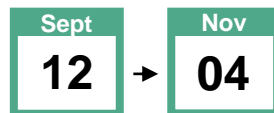


DATA COLLECTION METHOD

CATI SYSTEM
(Computer Assisted Telephone
Interviewing)
Recruitment by telephone



FIELDWORK PERIOD



TARGET

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



QUOTAS

COMPANY SIZE
& SECTOR



SAMPLE

5 865 | through
Europe
1 357 | out of
Europe

7 222 | Interviews
in total



DURATION OF INTERVIEW

20
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
2022 year

XX = score 2022



XX

Significantly lower than
2022 year

XX = score 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)/

NUMBER OF INTERVIEWS CONDUCTED IN SWEDEN



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



Companies with Less than 10 empl.
101 INTERVIEWS



Companies with 10 - 99 empl.
63 INTERVIEWS



Companies with 100 - 249 empl.
75 INTERVIEWS



Companies with 250 empl. or more
61 INTERVIEWS

**1 to 99
employees
164 INTERVIEWS**

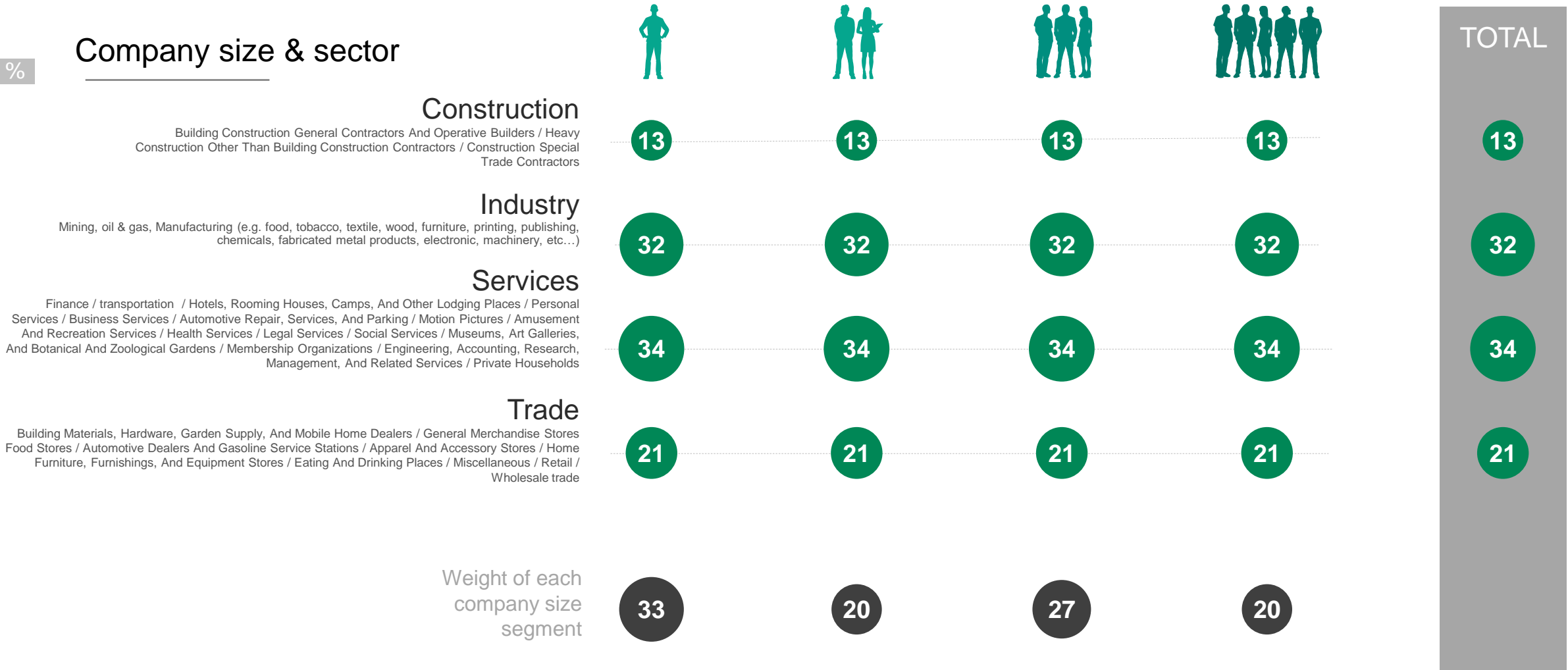
**100 employees
and more
136 INTERVIEWS**

SAMPLE STRUCTURE IN SWEDEN



In %

Company size & sector



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

MOBILITY SOLUTIONS LIST AND DEFINITIONS



CORPORATE CAR SHARING:

where an employee can make a vehicle reservation via an external solution



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



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



AN APP TO BOOK MOBILITY SOLUTIONS PROVIDED BY THE COMPANY



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



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



PUBLIC TRANSPORT



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



CAR OR CASH ALLOWANCE *New item

2

EXECUTIVE SUMMARY



INSIGHT 1 : MOST SWEDISH COMPANIES REMAIN CONFIDENT ABOUT THEIR FUTURE FLEETS, EVEN IF SOME LARGE COMPANIES ARE MORE PESSIMISTIC

#1

SOME BIG COMPANIES ANTICIPATE A FLEET DECREASE

- This year, most **Swedish companies** expect that their fleet will **remain stable or even increase**, in line with the European trend.
 - This optimism mostly relies on increased **HR related needs**.
- But some **big companies** are less optimistic and expect a **decreasing fleet for 19% of them**.
- Regarding homeworking, it has definitely not impacted companies' mobility policy.
- Future challenges for the Swedish fleets in the next 3 years are to deal with **longer vehicles' delivery time** and the **increase of total cost of ownership of the vehicles**.
- But for now, Swedish companies have not extended the **length of their vehicles' lifecycle** yet, which **remains shorter than the European average**.

INSIGHT 2 : OPERATING LEASING IS THE MAIN FINANCING METHOD OF SWEDISH COMPANIES

#2

OPERATING LEASING IS WELL-ESTABLISHED AND COULD EVEN GAIN MORE GROUND

- In 2023, **Operating leasing appears to be the main method** to finance Swedish corporate vehicles.
 - Operating leasing is chosen to finance both passenger cars and LCVs at similar level.
 - **Conveniency** and **financial interest** are the main assets of Operating leasing mentioned by fleet managers.
- What's more, **Operating leasing shows some growth potential**, especially by medium companies.
- Operating leasing is closely followed by Financial leasing.

INSIGHT 3 : SWEDISH COMPANIES REMAIN VERY ADVANCED IN TERMS OF ALTERNATIVE FUEL TECHNOLOGIES IMPLEMENTATION

#3

SWEDISH COMPANIES ARE AT THE FOREFRONT OF ALTERNATIVE FUEL TECHNOLOGIES IMPLEMENTATION

- In 2023, a **large majority of Swedish companies have already adopted at least one alternative fuel technology for their passenger cars**, and **one fourth have already turned toward 100% BEV for their LCVs**.
- Sweden keeps its **strong leadership in Europe** in terms of alternative fuel technologies implementation.
- Energy mix remains dominated by **plug-in hybrids first, and then by 100% BEV**, even though hybrid use is rising in 2023.
- For LCVs, hydrogen fuel cell is marginal for now, but shows some growth potential.
- Despite the ongoing difficulties to access to charging points in the public area, this high level of alternative fuel technologies' adoption is supported by companies' commitment to **deploy charging points at employees' home**.
- Lastly, a **shift to 100% BEV is anticipated** as it is expected to become the main fuel technology in the next 3 years, at a higher than at European level for both vehicle's types.

#4

DRIVEN BY THE SMALLEST COMPANIES

- This year, **76% of Swedish companies have already implemented at least one mobility solution**, ahead of the European average.
- **This high level is driven by the smallest companies** which have definitely caught up bigger ones in terms of mobility solutions implementation.
- The most widespread mobility solutions within these small companies are corporate car sharing, ride sharing, mobility budget and mobility app.

#5

MORE WIDESPREAD WITHIN LCVS FLEETS

- **42% of Swedish companies have adopted telematics**, in line with last year's trend, and in line with the European average, even though it is increasing significantly this year.
- In the detail, telematics are still a little **more widespread for LCVs** than for passenger cars.
- To be noticed this year, the main reason to adopt telematics is to **avoid not allowed usage** for most companies, for passenger cars as well as for LCVs.

3

WHAT ARE THE MAIN CHARACTERISTICS OF THE FLEETS?



OVERALL SWEDISH COMPANIES REMAIN CONFIDENT ABOUT THEIR FUTURE FLEETS EVEN IF SOME BIG COMPANIES ANTICIPATE A FLEET DECREASE

1

- In 2023, most Swedish companies are still confident about the future of their fleets:
 - In line with the European trend, 91% of them expect from their fleet to remain stable or even increase in the next 3 years.
 - To be noticed, a light slow down of fleet growth for the biggest companies, as 19% of them are expecting a decreasing fleet (versus 4% last year).

2

- This year, this expected growth is mainly induced by **increased HR related needs** : company's vehicle are a mean to recruit talent or to retain employees.

3

- Confirming last year's tendency, the development of **homeworking** has still low effect on companies' mobility policy, with 93% of companies which don't consider any adjustment of their mobility policy.

4

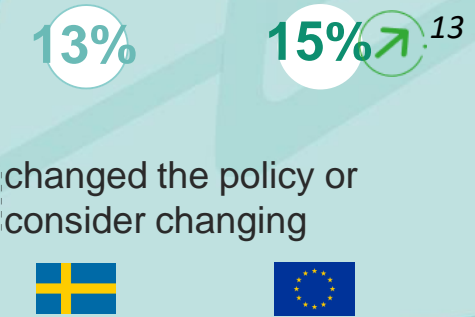
- According to most Swedish companies, future challenges for the fleets in the next 3 years are to deal with **longer vehicles' delivery time** and the **increase of total cost of ownership of the vehicles**.

But for now, Swedish companies have not extended the **length of their vehicles' lifecycle** yet, which **remains shorter than the European average**.

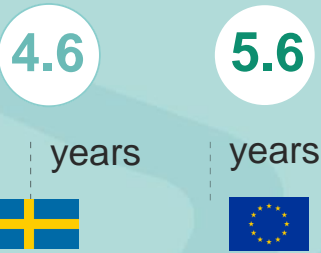
FLEET PROFILE



MOBILITY POLICY
ADAPTATION
COINCIDING WITH
HOMEWORKING



FLEET POSSESSION
LENGTH



ANTICIPATED
FLEET EVOLUTION
(% will increase or remain stable)



RESPONDENTS POSITION WITHIN THE COMPANY

In %



Passenger cars + LCVs



New question added in 2023

Could you please specify your exact position in the company?

Basis: companies with corporate vehicles = 100%

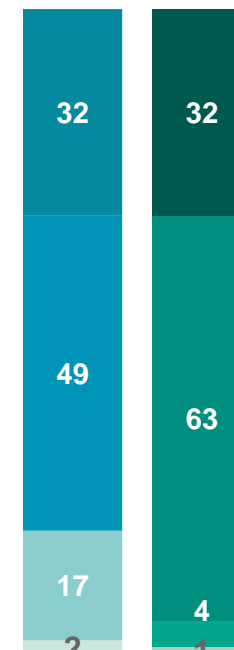
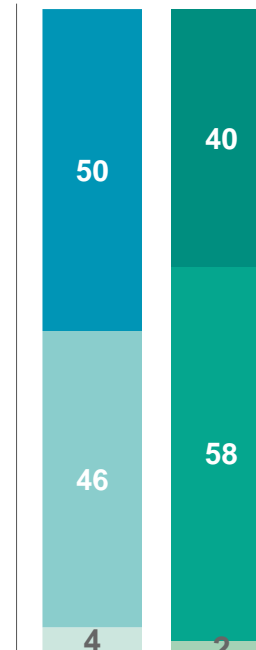
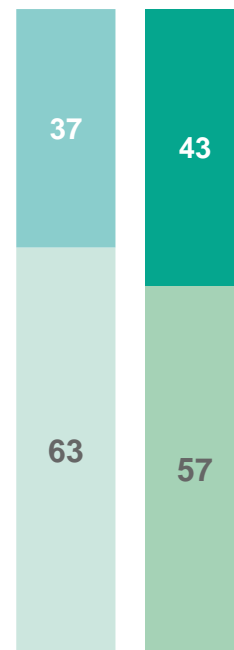
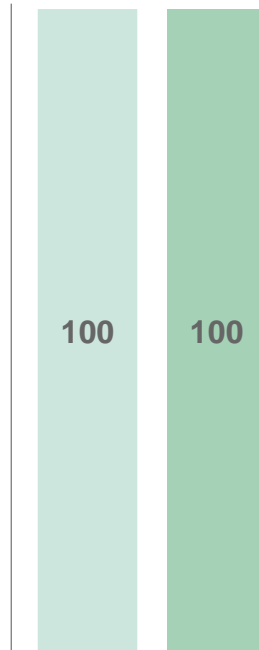
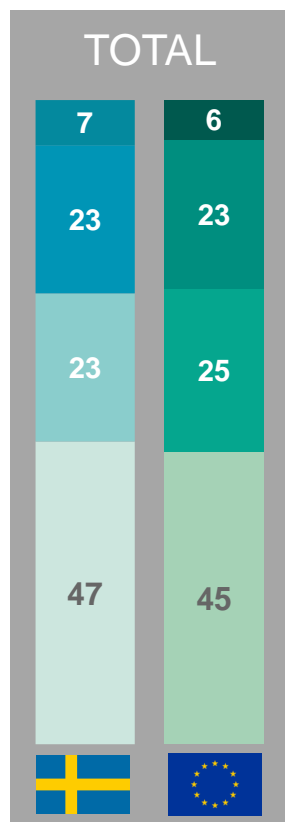
NUMBER OF VEHICLES IN FLEET

In %



Passenger cars + LCVs

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

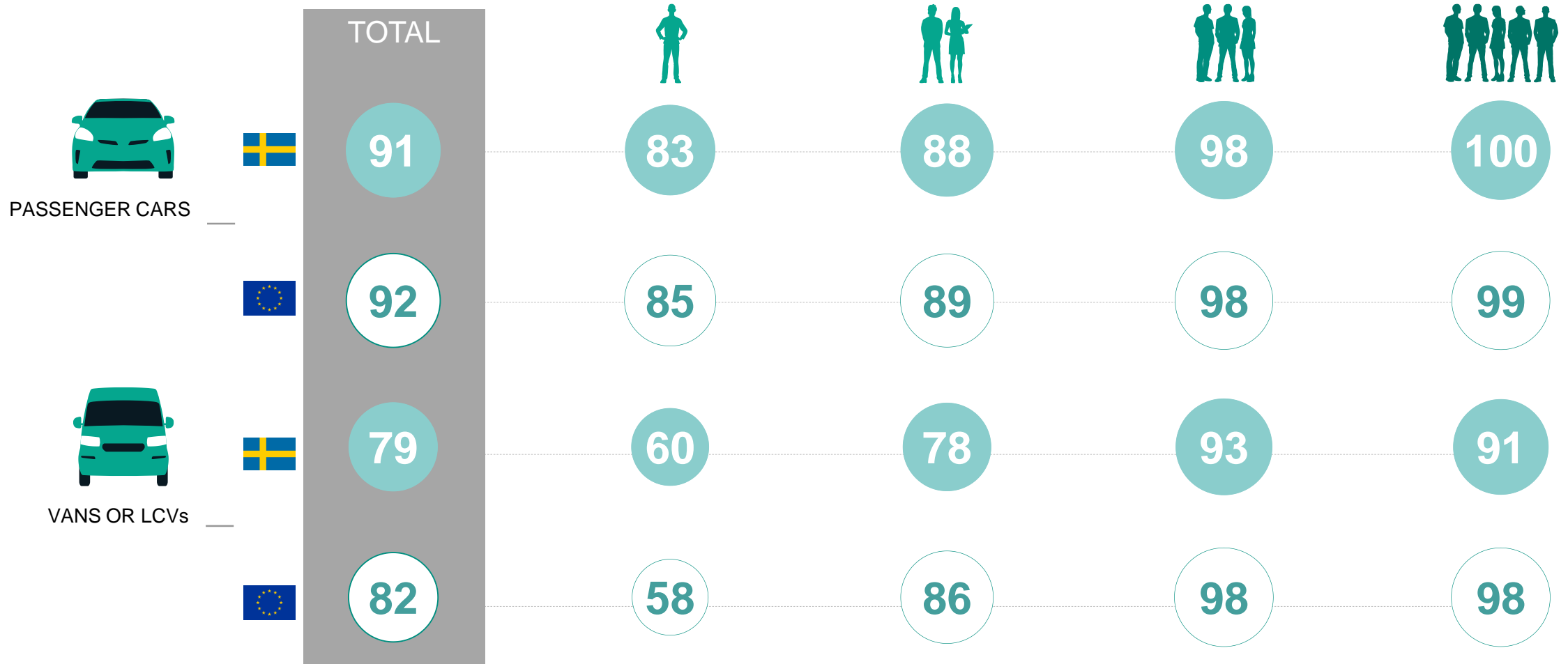


Can you please tell us the total number of vehicles of less than 3.5 tons in your fleet?
Basis: companies with corporate vehicles = 100%

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

(among companies with at least one vehicle in fleet)

In %



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%

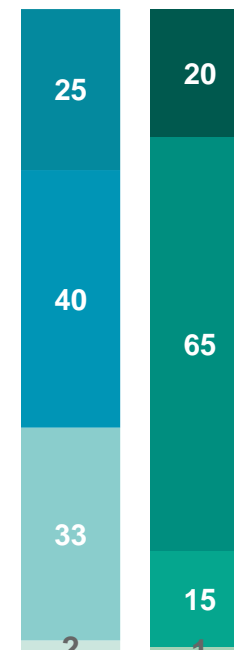
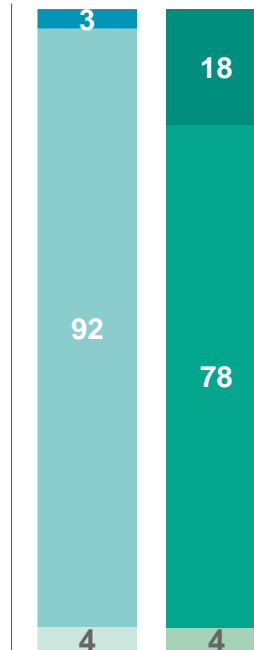
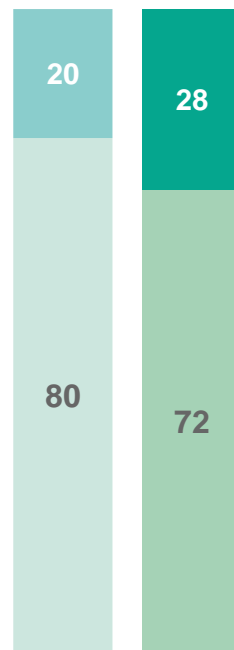
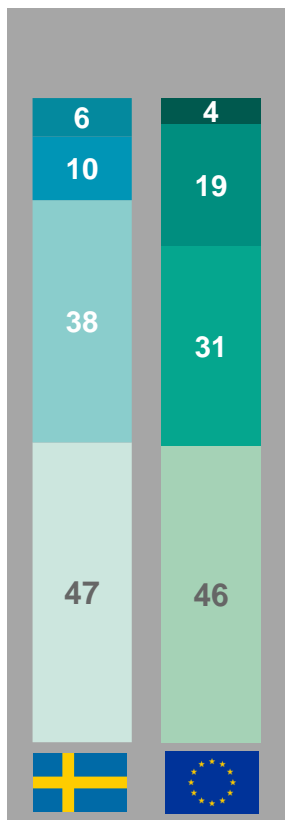
NUMBER OF PASSENGER CARS IN FLEET

In %



Passenger cars

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



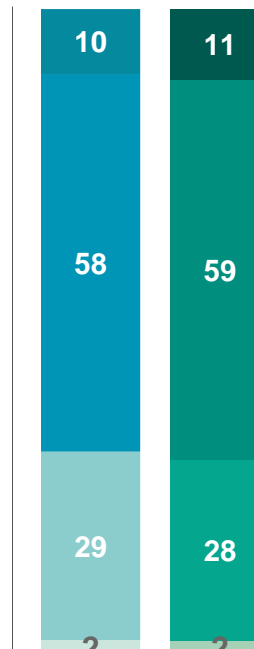
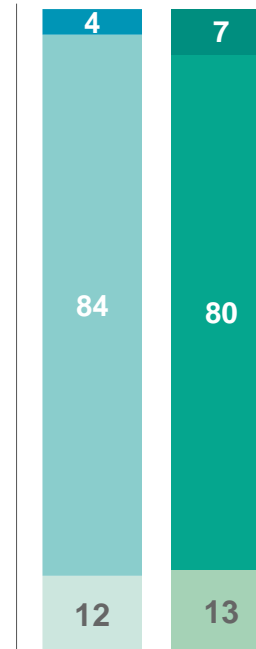
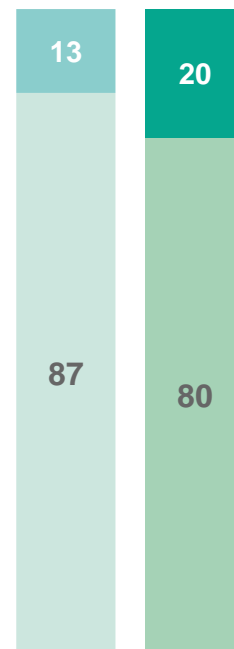
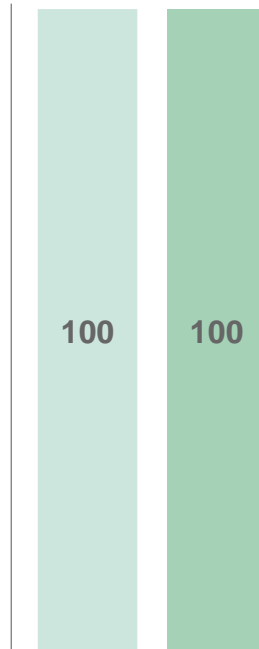
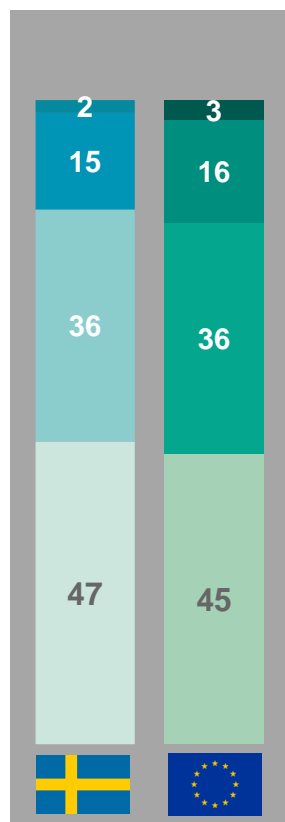
NUMBER OF LCVs IN FLEET

In %



LCVs

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



VEHICLES POSSESSION LENGTH



Passenger cars + LCVs

AVERAGE IN YEARS



TOTAL

4.6

5.6



4.3

5.6



4.6

5.7



4.5

5.6



5.4

5.6

PASSENGER CARS POSSESSION LENGTH



New question added in 2023
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

4.8

5.8



4.1

5.8



5.1

5.9



4.7

5.7



5.6

5.7

FLEET GROWTH POTENTIAL

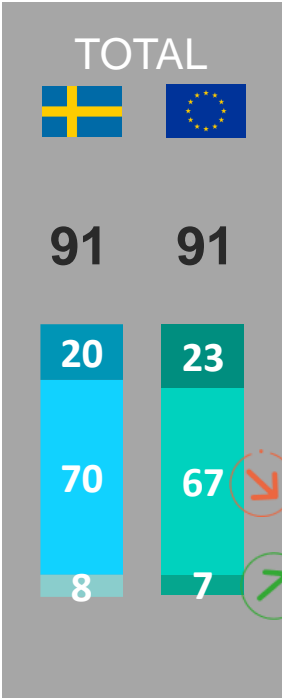
In %



Passenger cars + LCVs

% Stable or increase

Increase
Remain stable
Decrease



HOW TO READ THE RESULTS ?

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



90

89

93

92

97

92

80

91

20

24

22

23

21

23

17

23

69

64

72

69

76

69

64

68

6

9

7

7

3

6

19

7

BALANCE in pts (INCREASE ⊖ DECREASE)

2023

+12 +16

+14 +15

+15 +16

+18 +17

-2 +16

2022

+14 +18

+13 +19

+7 +17

+10 +17

+27 +17

2021

+29 +35

+7 +22

+17 +31

+43 +43

+63 +50

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%



FLEET GROWTH POTENTIAL

In %

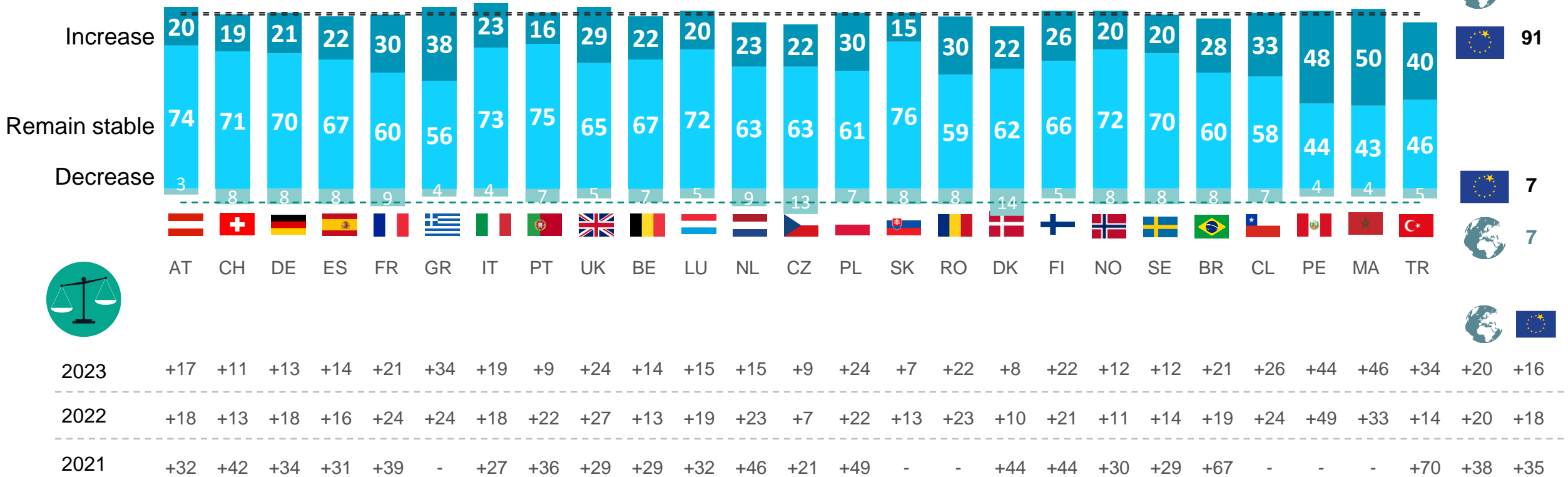


Passenger cars + LCVs

HOW TO READ THE RESULTS ?

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

% Stable or increase



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

In %



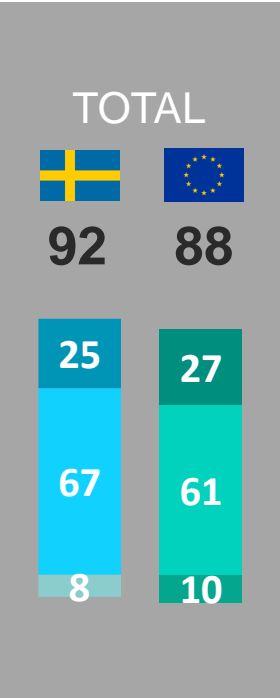
Passenger cars

% Stable or increase

Increase

Remain stable

Decrease

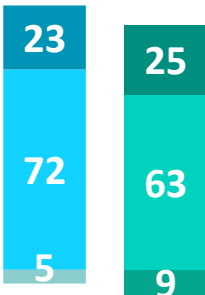


HOW TO READ THE RESULTS ?

In Sweden, 92% of the companies declare that in the next 3 years the total number of passenger cars will remain stable or increase.



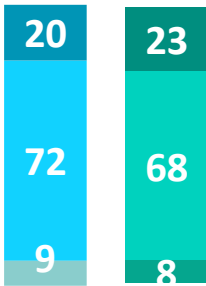
94 88



+18 +16



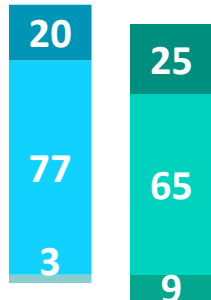
91 91



+11 +15



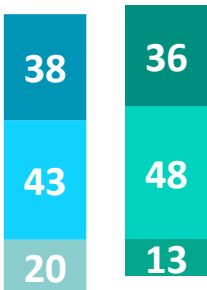
97 90



+17 +17



80 84



+18 +22

BALANCE in pts (INCREASE ⊖ DECREASE)

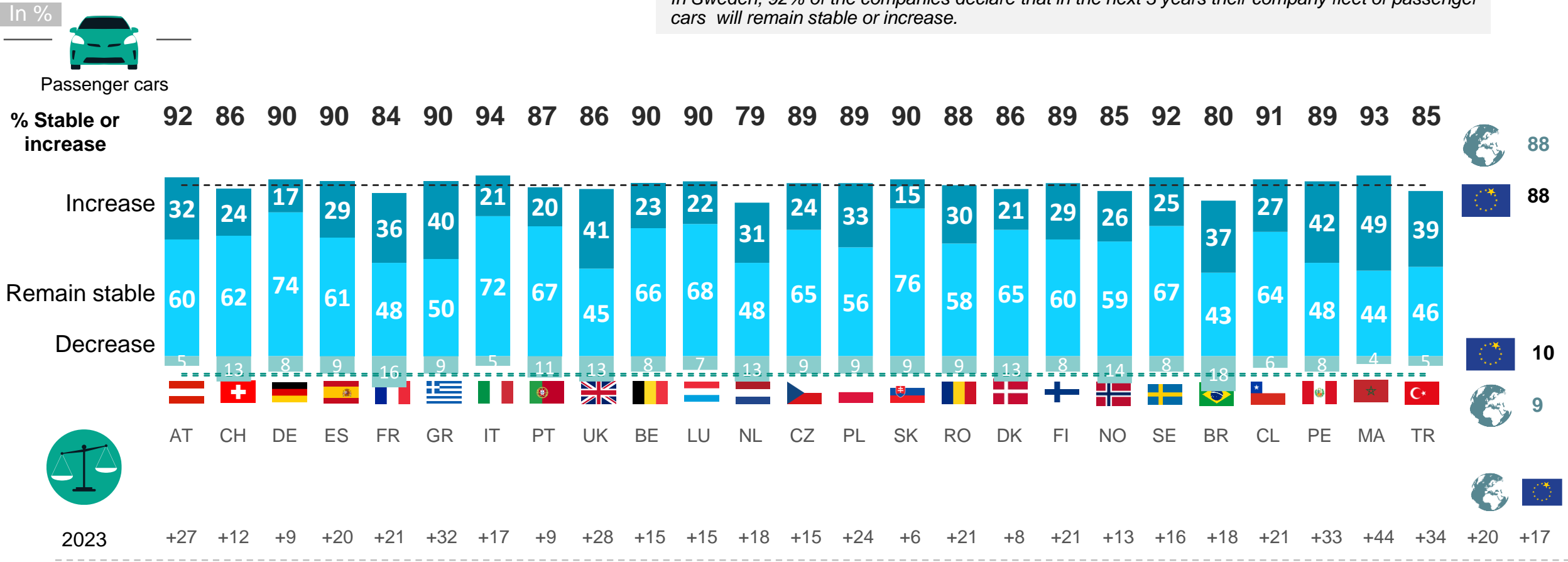
2023

+16 +17

PASSENGER CAR FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

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



New question added in 2023
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

In %



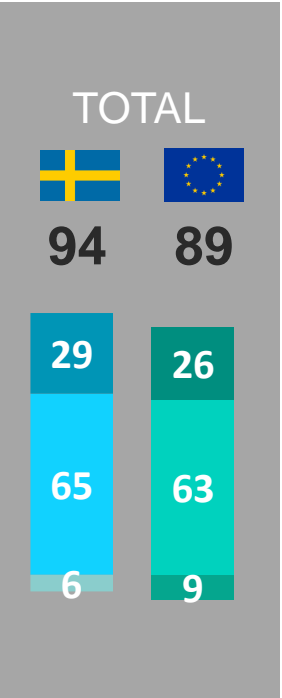
LCVs

% Stable or increase

Increase

Remain stable

Decrease



HOW TO READ THE RESULTS ?

In Sweden, 94% of the companies declare that in the next 3 years the total number of LCVs will remain stable or increase.



94

88

93

91

98

92

88

86

+30

+19

+23

+15

+17

+17

+22

+17

BALANCE in pts (INCREASE ⊖ DECREASE)

2023

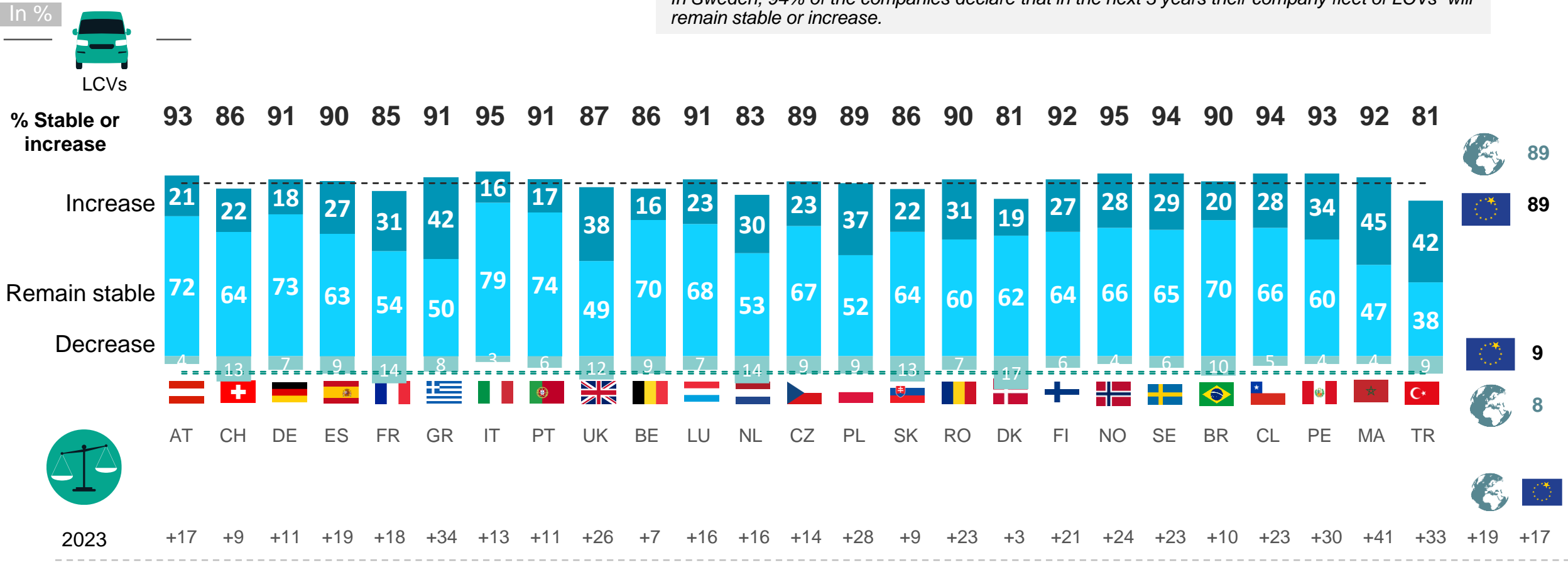
+23

+17

LCVS FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Sweden, 94% of the companies declare that in the next 3 years their company fleet of LCVs will remain stable or increase.



New question added in 2023
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

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



57

35

66

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



26

19

25



32

63



18

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

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



15

Because of tax decreases

1

18

11

7

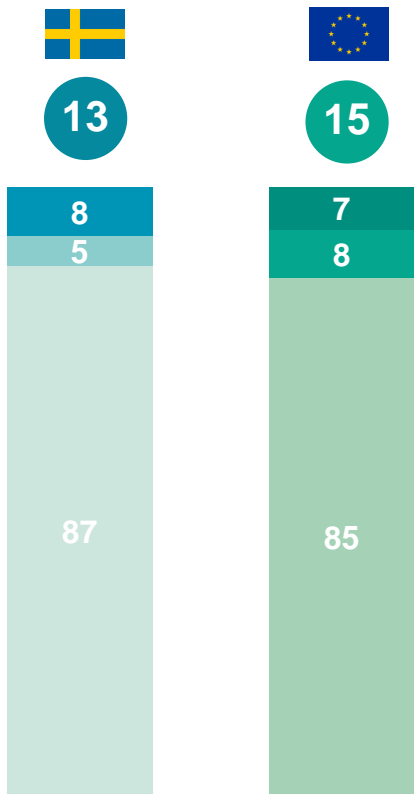
Why do you think the total number of vehicles in your company fleet will increase?
Basis: companies expecting an increase of the fleet

MOBILITY POLICY ADAPTATION COINCIDING WITH HOMEWORKING

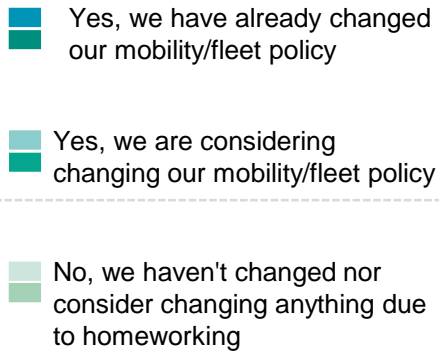
In %



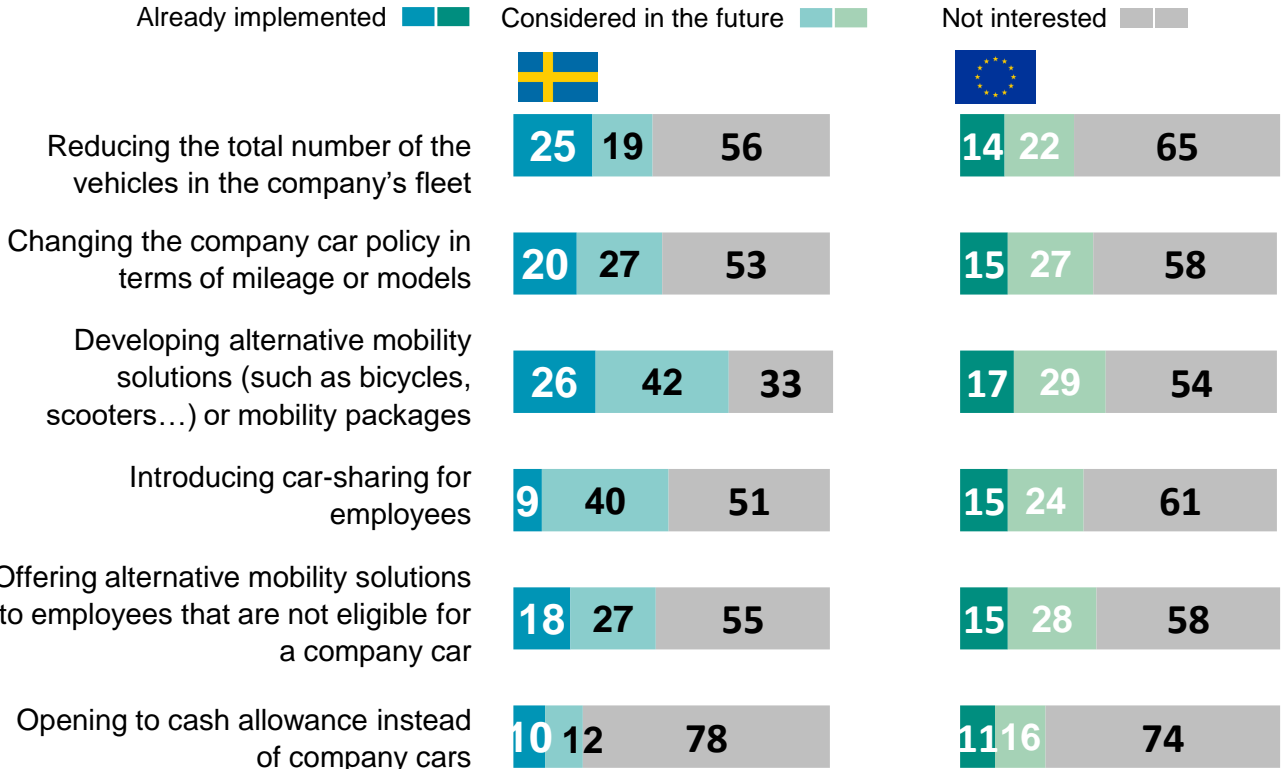
Passenger cars + LCVs



NET CHANGED THE POLICY
OR CONSIDER CHANGING



HOW TO READ THE RESULTS ?
In Sweden, among the companies that changed or consider changing their mobility policy, 25% have already reduced the total number of the vehicles in the company's fleet.



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

Basis: companies with corporate vehicles = 100%

This question has been asked differently in 2023.

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 %



Nb 1 challenge
Top 3 challenges

Passenger cars + LCVs

Implementing alternative fuel technologies (100% electric vehicles, hybrids, rechargeable hybrids)

Adapting to restrictive public policies on petrol and diesel vehicles

Managing longer vehicles' delivery time

Adapting to the expansion of low emission zones in urban areas

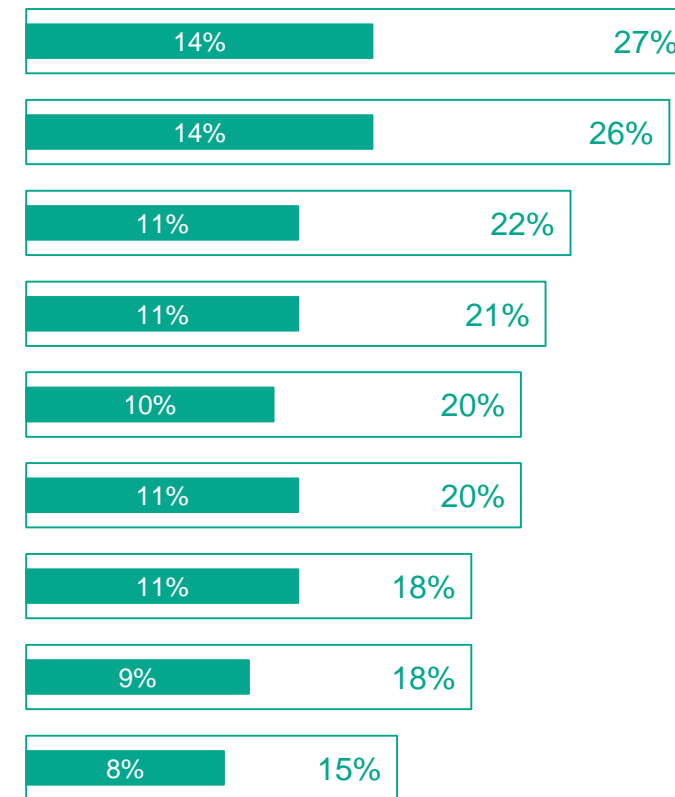
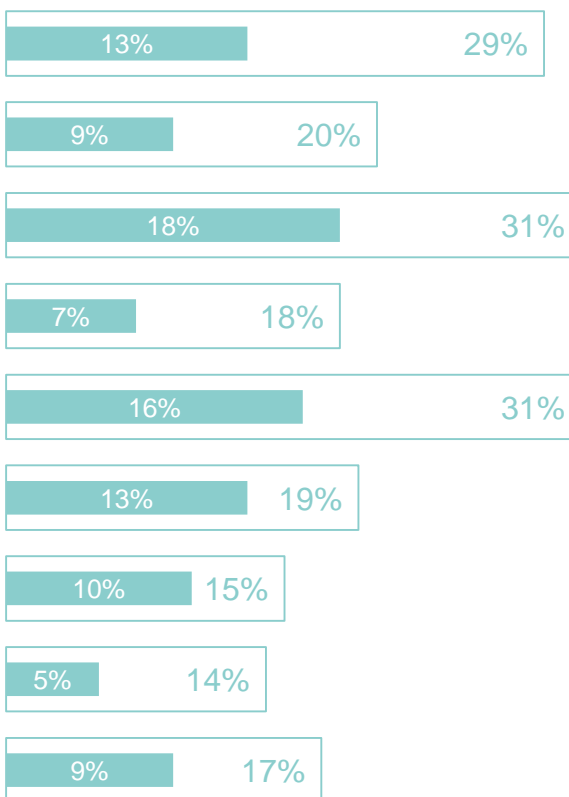
Mitigating the increase of total cost of ownership of the vehicles

Inducing more responsible driving among employees

Adjusting to new ways of working (hybrid between home and office)

Adapting to evolutions of car selling models (ex. directly from manufacturer without buying through car dealer)

Implementing other mobility solutions (ex. car sharing, bikes...)



New question added in 2023

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 ?
Basis: companies with corporate vehicles = 100%

4

HOW ARE COMPANIES FINANCING THEIR FLEET?



OPERATING LEASING IS THE MAIN FINANCING METHOD OF SWEDISH COMPANIES

To note : in 2023, question about financing methods repartition was asked differently, which means there will be no comparison with 2022.

1

- In 2023, 38% of Swedish companies declare that **Operating leasing is the main financing method** (38%) used to finance their company vehicles, closely followed by **Financial leasing** (35%).

Operating leasing is chosen to finance both passenger cars (38%) and LCVs (36%).

2

- What's more, **Operating leasing shows some growth potential, especially by medium companies** from 100 to 249 employees, as 28% of them intend to introduce or increase use of Operating Leasing to finance their corporate fleet.

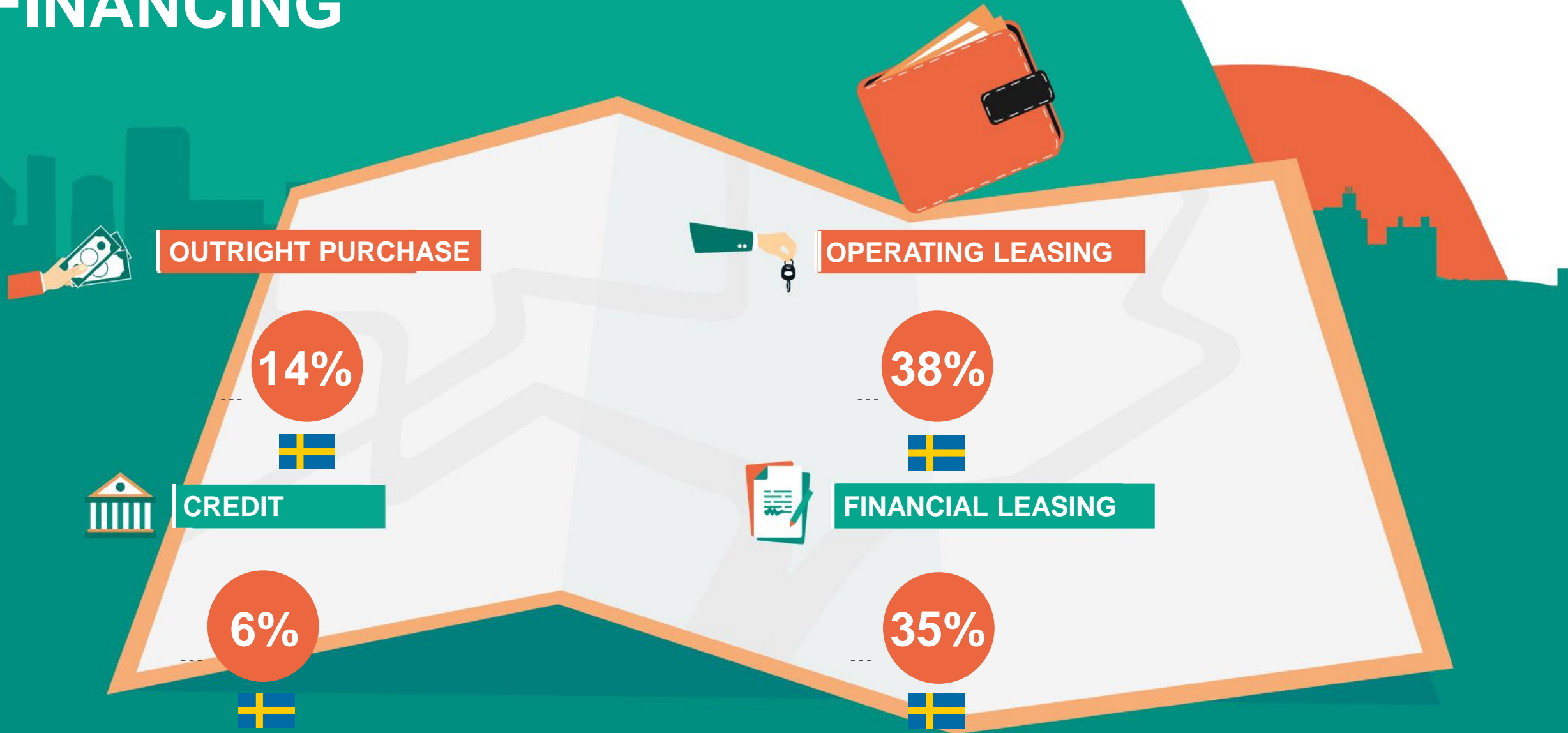
3

- Operating leasing is appreciated for its **conveniency** (included services, reduced administration, flexible contract) as well as for its **financial interest** (fixed monthly rental, released capital, reduced financial risks).

4

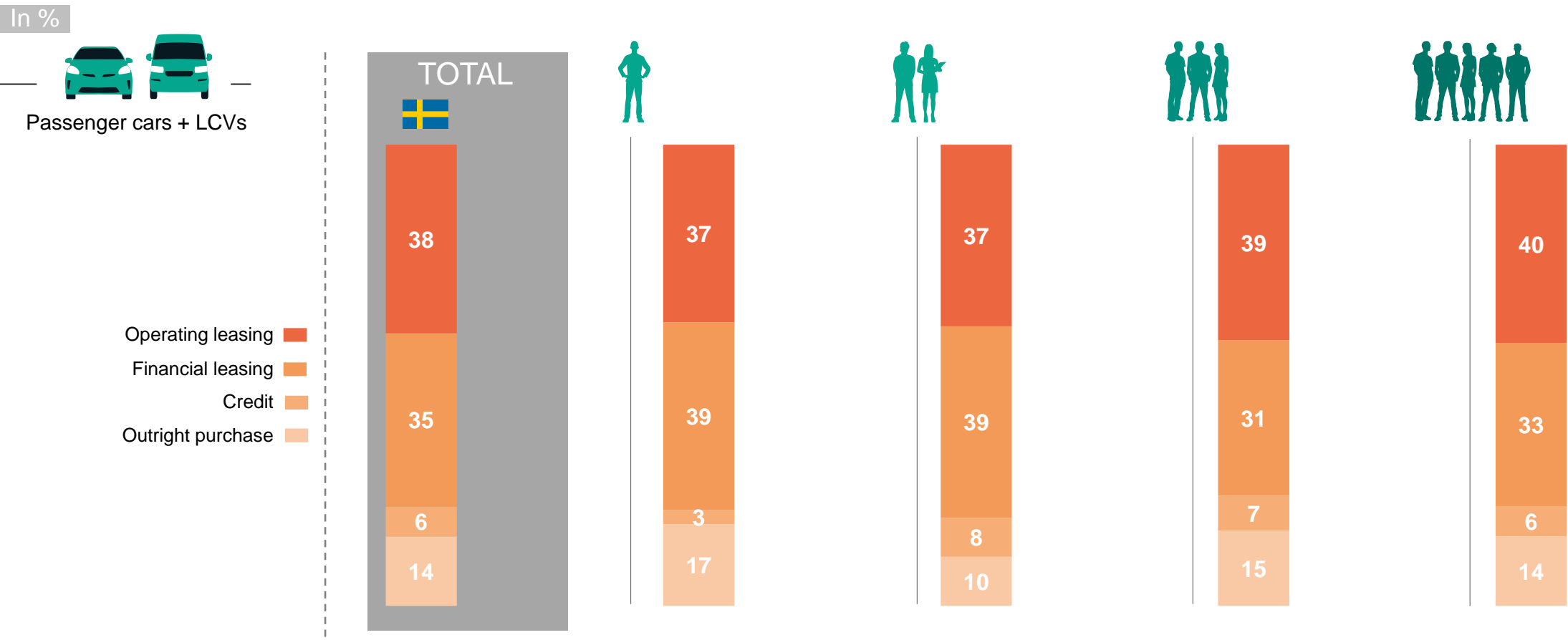
- When setting up the car policy, **total cost of ownership** and **durability** (environmentally friendly cars) are major criteria for Swedish companies.

FINANCING



This question has been asked differently in 2023, no comparison vs 2022

MAIN FLEET FINANCING METHOD



This question has been asked differently in 2023, no comparison vs 2022

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

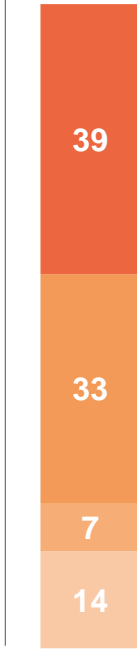
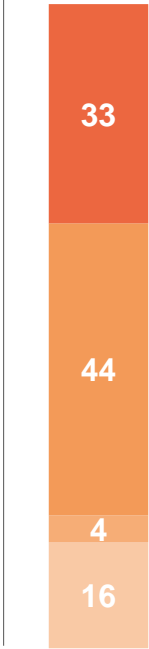
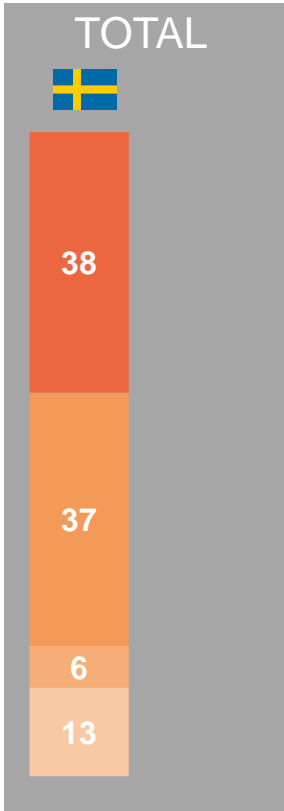
MAIN PASSENGER CARS FINANCING METHOD

In %



Passenger cars

- Operating leasing
- Financial leasing
- Credit
- Outright purchase



New question added in 2023

And what is the main method used to finance your passenger cars today?
Basis: companies with passenger cars

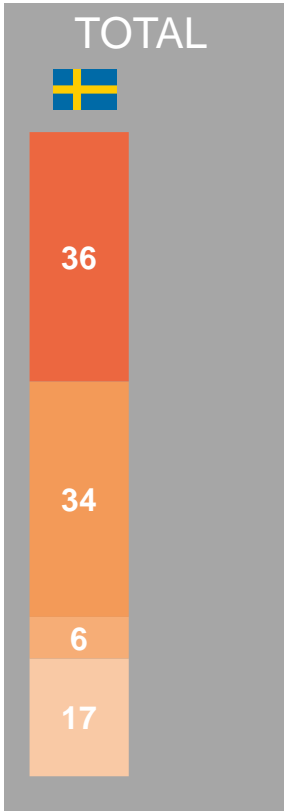
MAIN LCV FINANCING METHOD

In %



LCVs

- Operating leasing
- Financial leasing
- Credit
- Outright purchase



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 %



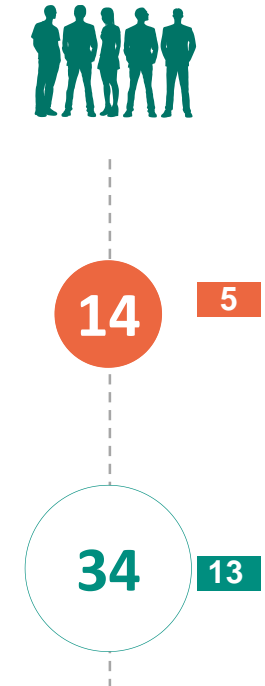
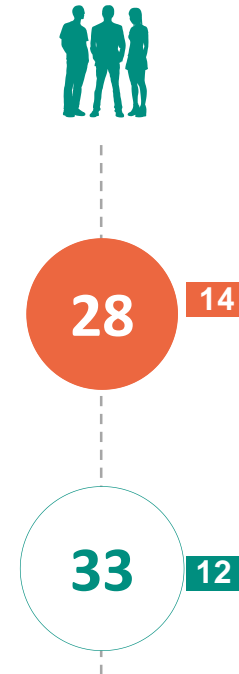
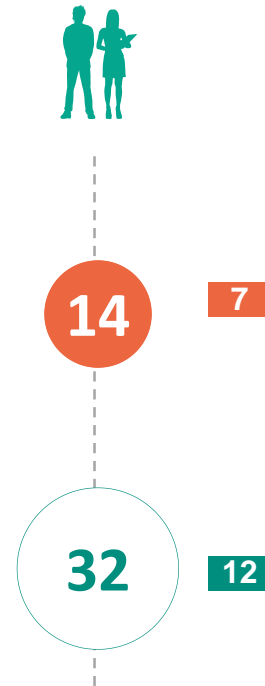
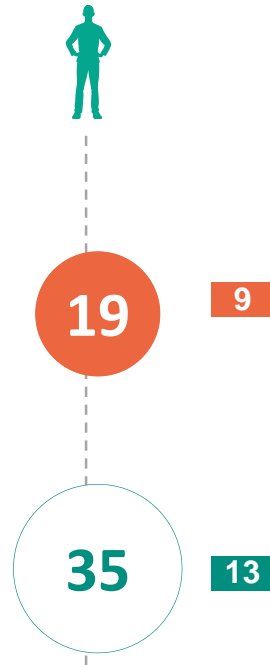
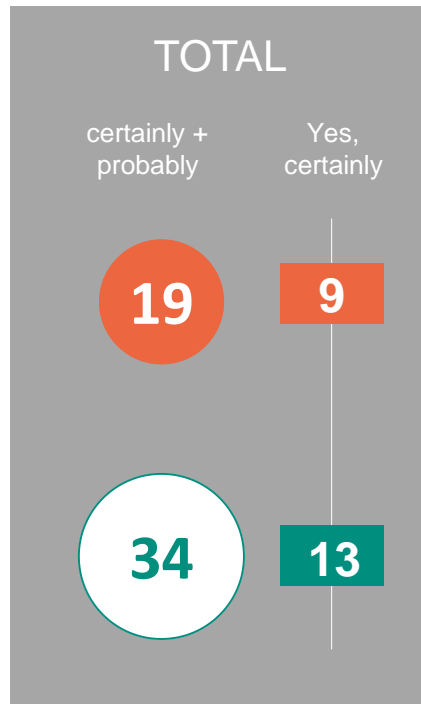
Passenger cars + LCVs



—



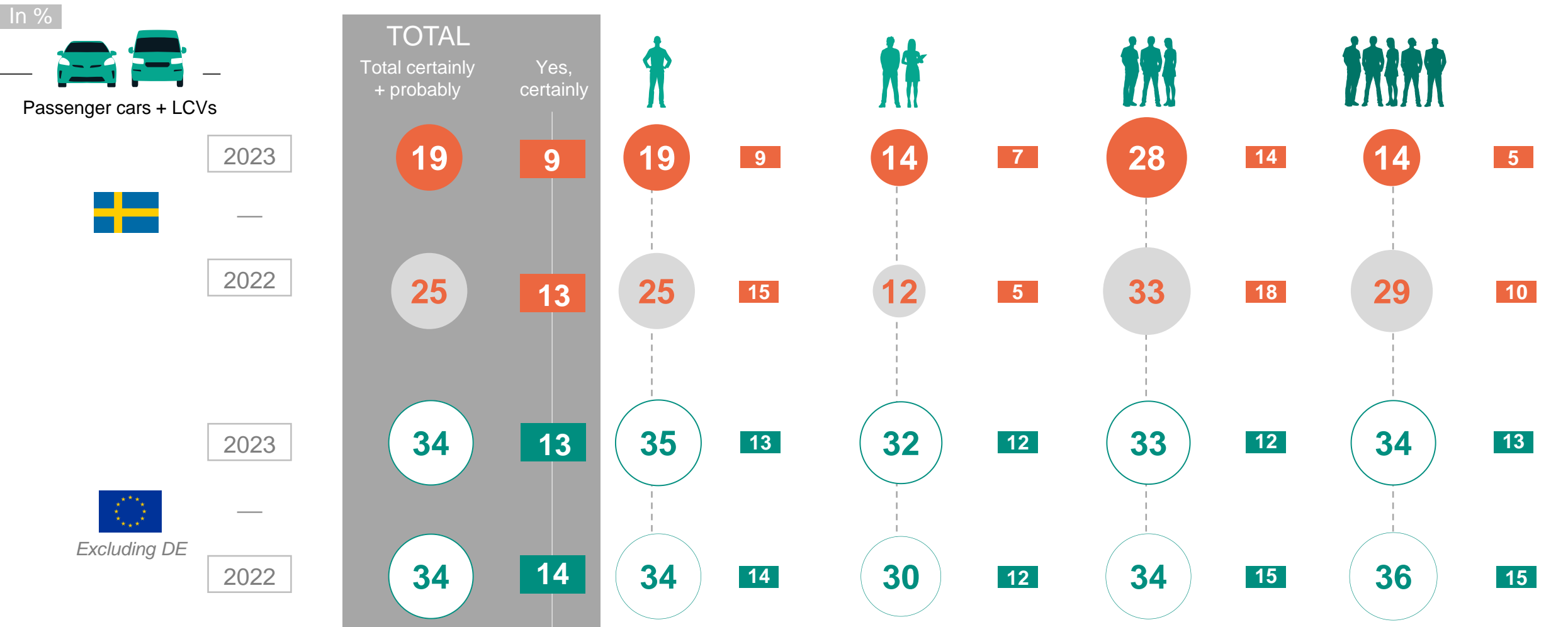
Excluding DE



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

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



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

MAIN ADDED VALUES OF OPERATING LEASING

In %



Passenger cars + LCVs

Fixed monthly rental

Release capital into the business

Reduce vehicle administration

No risk regarding residual value, service, repairs and tires

All services included / a full package: All is included in the rental agreement

A flexible contract

None of these values

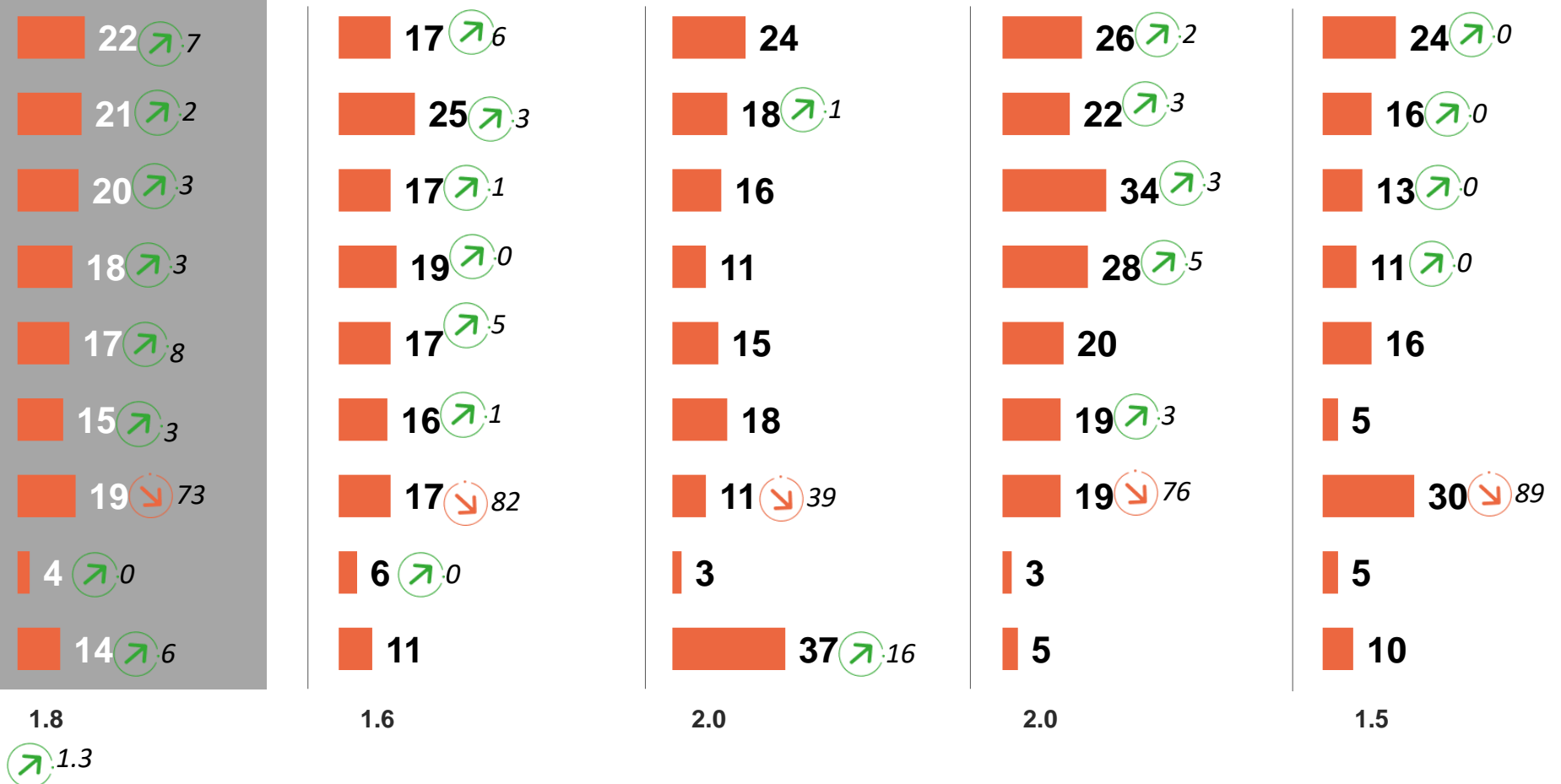
Other

Don't know

TOTAL



Average number of quotations



1.8
↑ 1.3

1.6

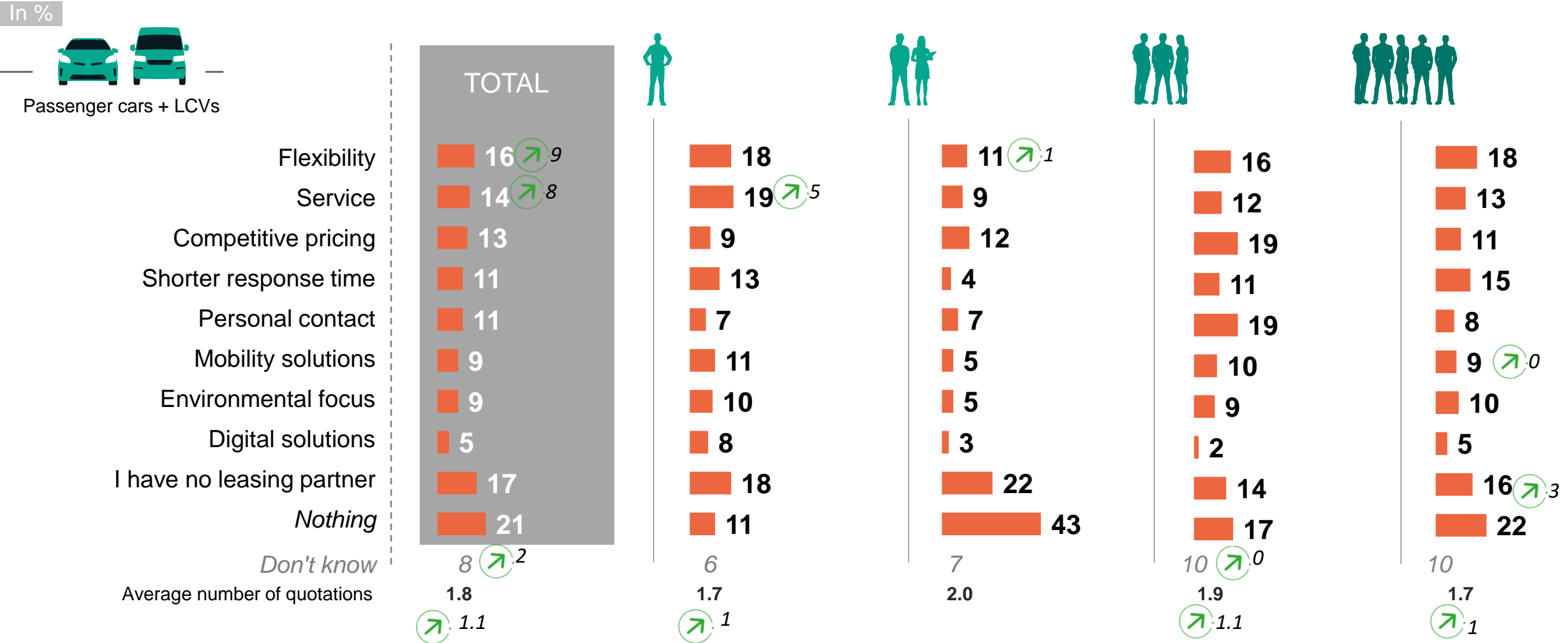
2.0

2.0

1.5

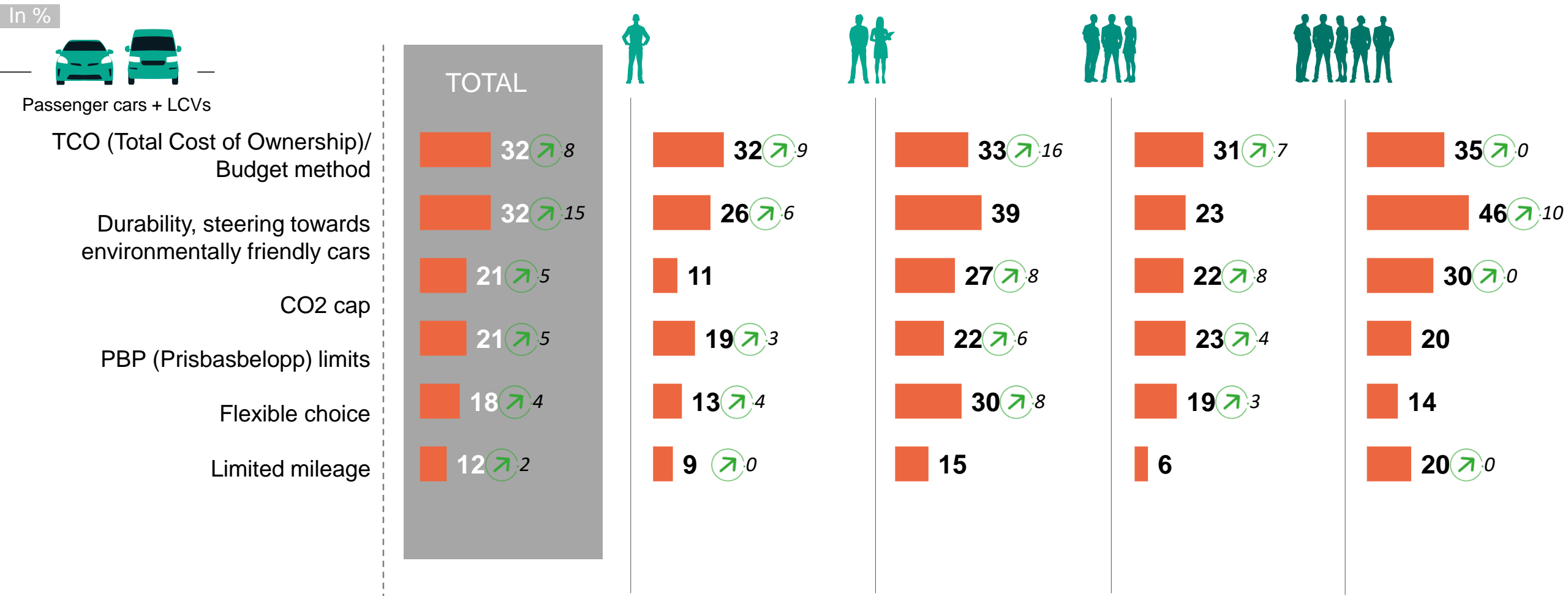
According to you, what are the main added values of Operating Leasing for company vehicles?
Basis: companies with corporate vehicles = 100%

SERVICES MISSING FROM THE CURRENT LEASING PARTNER



What do you miss from your leasing partner today?
Basis: companies with corporate vehicles = 100%

CRITERIA CONSIDERED WHEN SETTING UP THE CAR POLICY



Which of the following criteria were taken in account when setting up your car policy?
Basis: companies with corporate vehicles = 100%

5

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



SWEDISH COMPANIES ARE AT THE FOREFRONT OF ALTERNATIVE FUEL TECHNOLOGIES, ESPECIALLY PLUG-IN HYBRID

1

- In line with the European trend, **more Swedish companies** have adopted alternative fuel technologies for their fleets in 2023.
 - **85%** of companies have adopted Plug-in hybrids, hybrids or 100% BEV for their **passenger cars**, ahead of the European average.
 - **28%** of companies have adopted 100% BEV or Hydrogen fuel cell for their **LCVs**, also ahead of the European average.

2

- For passenger cars, hybrid use is in progress (40% using). But **Plug-in hybrid (59%) and 100% BEV (47%) are still the main used technologies**. Sweden turns out to be the most advanced European country in terms of plug-in hybrid implementation.

And for LCVs, **hydrogen fuel cell adoption is very low** but **shows some growth potential**, as around 13% of them are already using or consider using this fuel technology in the next three years.

3

- For both vehicles' types, the **lower environmental impact** remains the first motivation to turn towards these alternative fuel technologies. To be noticed this year, a higher consideration of the necessity to be **compliant with CSR (Corporate Social Responsibility) policy** for passenger car fleets.

4

- Besides, **charging points are developing at home**. Indeed, 1 company out of 4 declare they support or will support their drivers for charging points installation. But the **lack of charging points in the public area remains a barrier to a wider 100% BEV adoption**. In the meantime, high purchase price is less an issue this year.

5

- Nevertheless, Swedish companies are optimistic and expect that 40% of their passenger cars and 36% of their LCVs will be 100% BEV in 3 years.

ENERGY MIX



AT LEAST ONE ALTERNATIVE
IMPLEMENTED OR CONSIDERED*

for Passenger cars

ALREADY
USING OR
CONSIDER
USING IN THE
NEXT 3 YEARS

94%⁸²



77%⁶⁶



AT LEAST ONE ALTERNATIVE
IMPLEMENTED

for Passenger cars

85%⁷⁴



58%⁴⁸



EXPECTED PART OF 100%
ELECTRIC PASSENGER CAR IN 3 YEARS

40%



20%



EXPECTED PART OF 100%
ELECTRIC LCV IN 3 YEARS

36%



13%

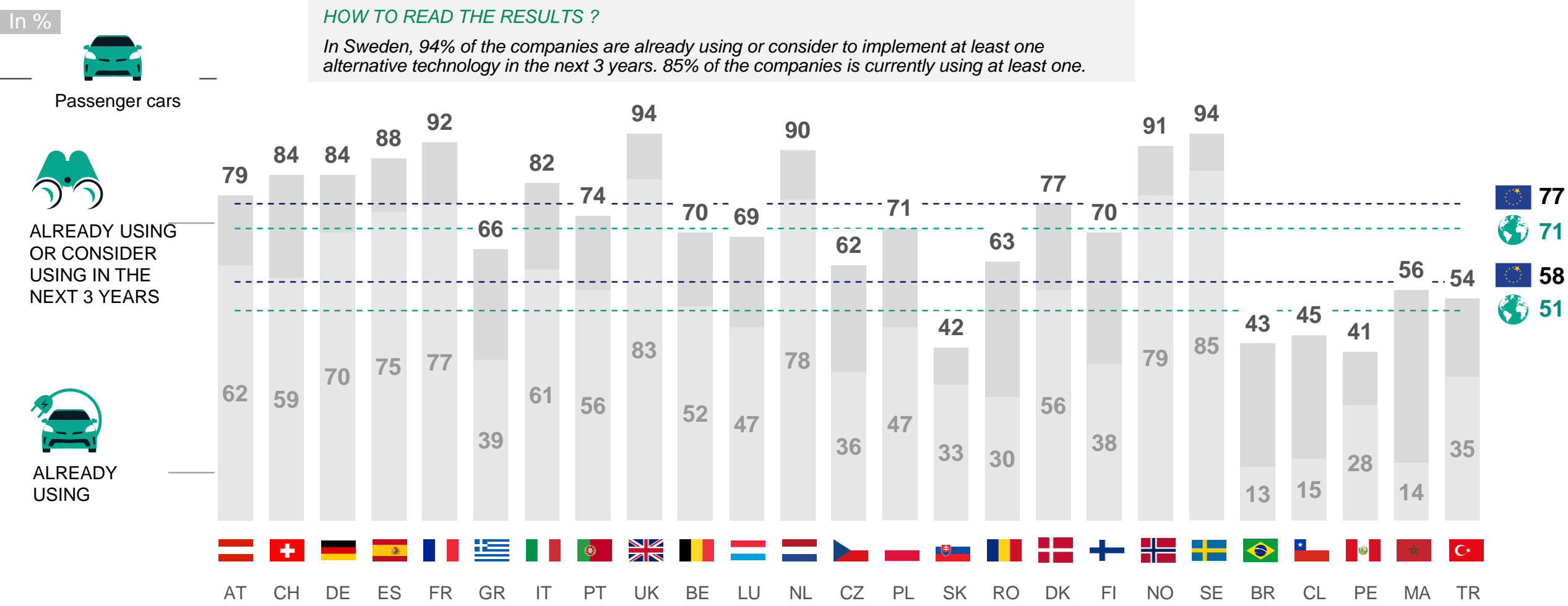


*LIST OF ENERGIES: Hybrid, Plug-in Hybrid, 100% Battery Electric Vehicle

This question has been asked differently in 2023

CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

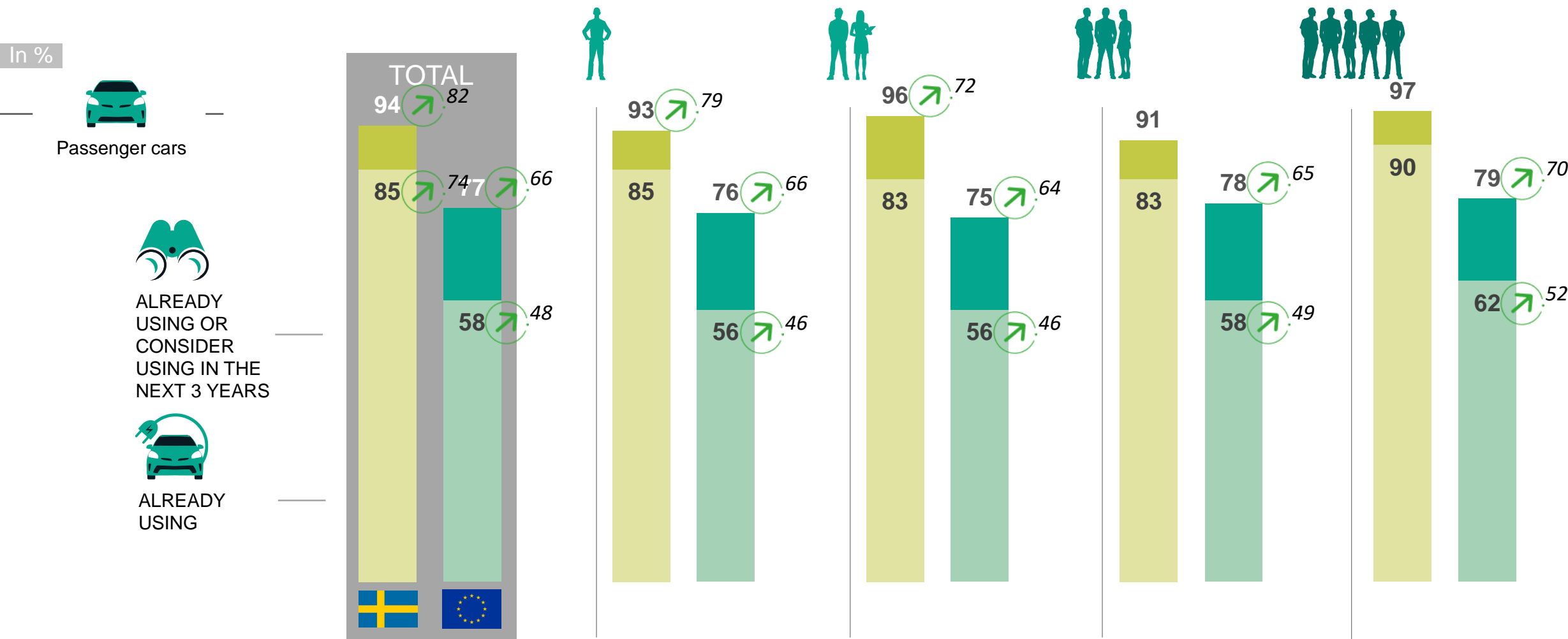
(At least one technology among HEV, PHEV and 100% BEV)



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

CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

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



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

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years

In %



Passenger cars



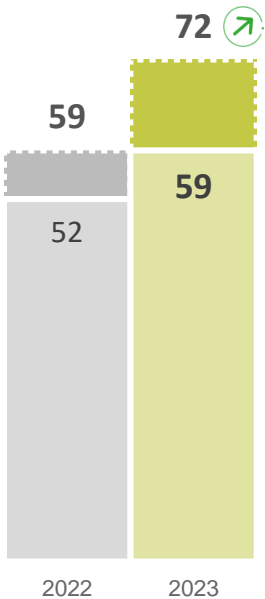
ALREADY USING OR
CONSIDER USING IN
THE NEXT 3 YEARS



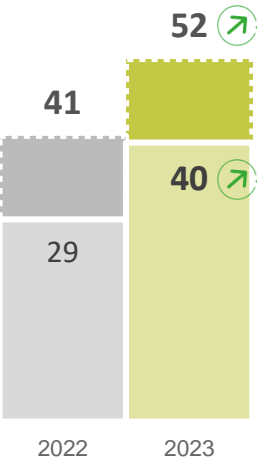
ALREADY
USING



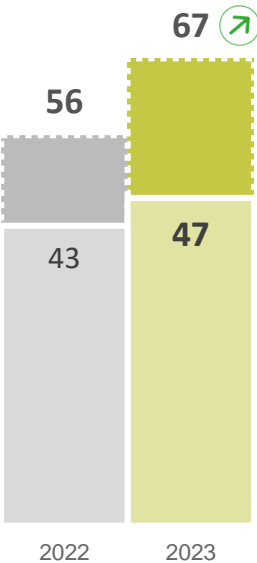
Plug-in Hybrid



Hybrid



100% Battery
Electric Vehicle



| Category | 2022 | 2023 |
|---|------|------|
| ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS | 24 | 29 |
| ALREADY USING | 37 | 44 |

| Category | 2022 | 2023 |
|---|------|------|
| ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS | 26 | 29 |
| ALREADY USING | 38 | 44 |

| Category | 2022 | 2023 |
|---|------|------|
| ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS | 19 | 24 |
| ALREADY USING | 34 | 40 |

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years – Focus Less than 10 empl.

In %



Passenger cars



ALREADY USING OR
CONSIDER USING IN
THE NEXT 3 YEARS



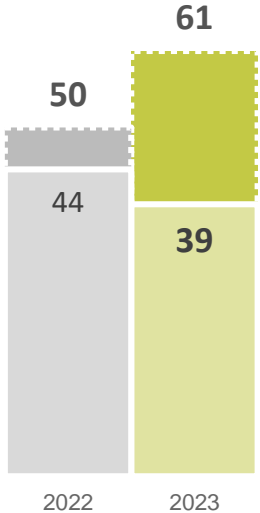
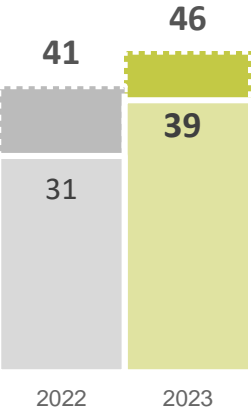
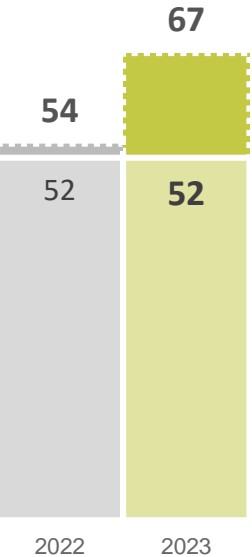
ALREADY
USING



Plug-in Hybrid

Hybrid

100% Battery
Electric Vehicle



| | | |
|----|----|---|
| 22 | 30 | ↗ |
| 36 | 44 | ↗ |

| | | |
|----|----|---|
| 25 | 27 | |
| 36 | 42 | ↗ |

| | | |
|----|----|---|
| 18 | 22 | ↗ |
| 32 | 39 | ↗ |

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years – Focus 10 - 99 empl.

In %



Passenger cars



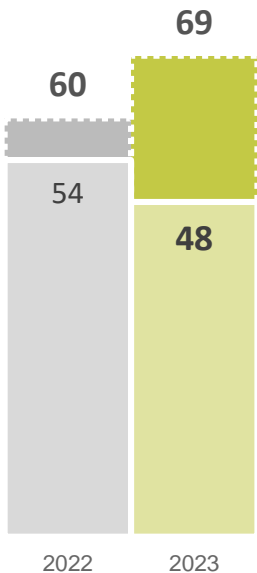
ALREADY USING OR
CONSIDER USING IN
THE NEXT 3 YEARS



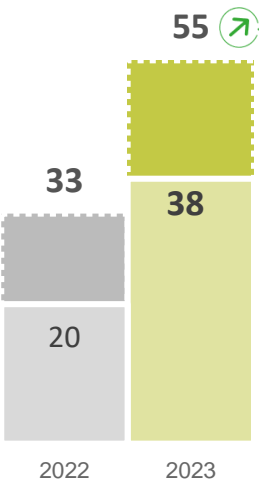
ALREADY
USING



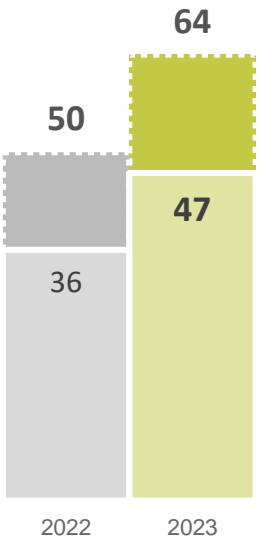
Plug-in Hybrid



Hybrid



100% Battery
Electric Vehicle



23 26

25 28

18 22

37 42

38 44

34 39

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years – Focus 100 - 249 empl.

In %



ALREADY USING OR
CONSIDER USING IN
THE NEXT 3 YEARS



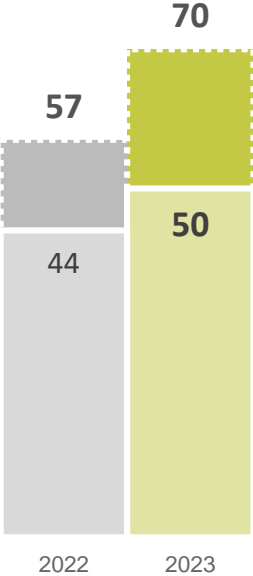
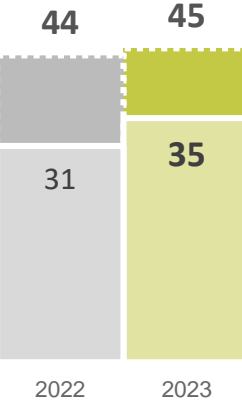
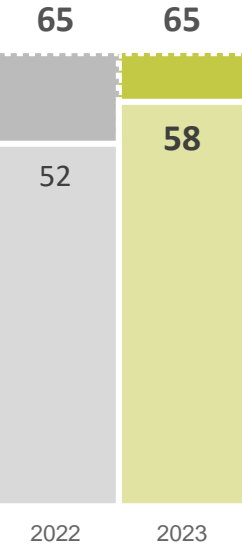
ALREADY
USING



Plug-in Hybrid

Hybrid

100% Battery
Electric Vehicle



26 29
37 44

28 31
40 43

20 24
35 42

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years – Focus 250 empl. or more

In %



Passenger cars



ALREADY USING OR
CONSIDER USING IN
THE NEXT 3 YEARS



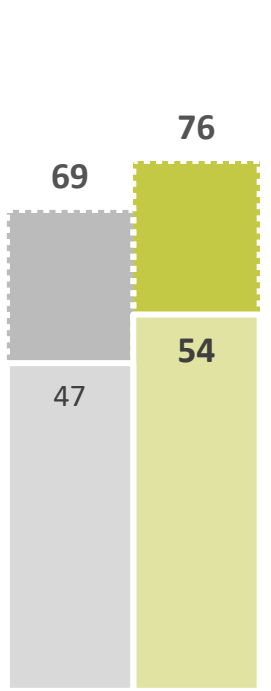
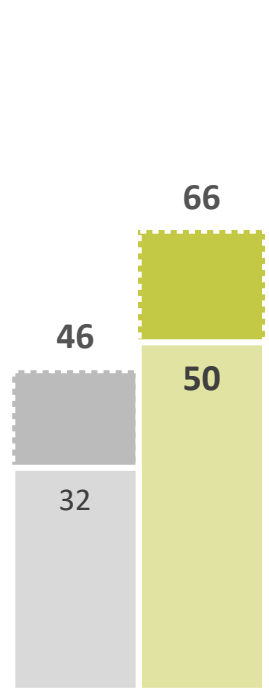
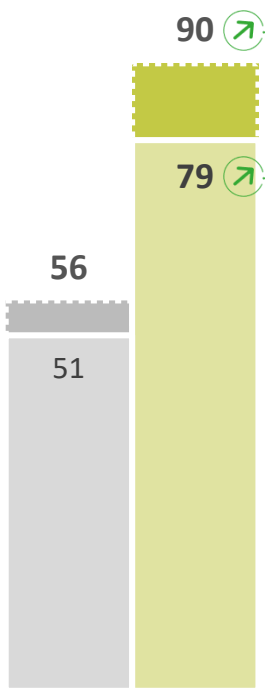
ALREADY
USING



Plug-in Hybrid

Hybrid

100% Battery
Electric Vehicle



2022 2023

2022 2023

2022 2023

27 32

28 33

22 26

40 46

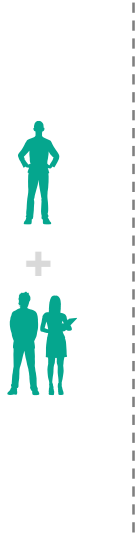
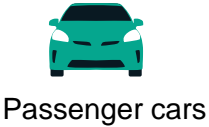
40 46

37 40

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years – Focus on 1 to 99

In %



ALREADY USING OR
CONSIDER USING IN
THE NEXT 3 YEARS



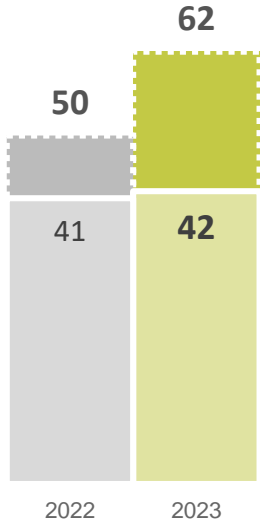
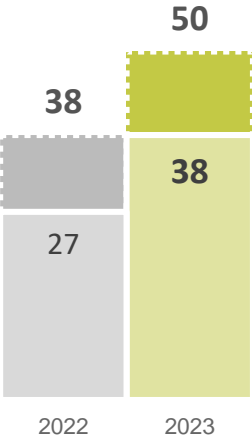
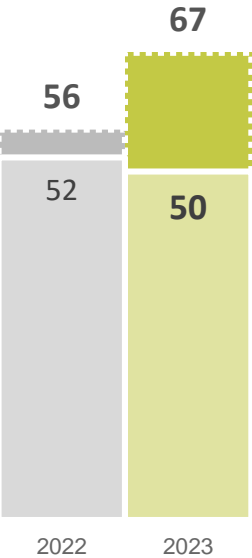
ALREADY
USING



Plug-in Hybrid

Hybrid

100% Battery
Electric Vehicle



| Technology | 2022 | 2023 |
|----------------|------|------|
| Plug-in Hybrid | 22 | 28 ↗ |
| Hybrid | 37 | 43 ↗ |

| Technology | 2022 | 2023 |
|----------------|------|------|
| Plug-in Hybrid | 25 | 27 |
| Hybrid | 37 | 43 ↗ |

| Technology | 2022 | 2023 |
|----------------|------|------|
| Plug-in Hybrid | 18 | 22 ↗ |
| Hybrid | 33 | 39 ↗ |

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years – Focus on 100 and more

In %



Passenger cars



+



ALREADY USING OR
CONSIDER USING IN
THE NEXT 3 YEARS



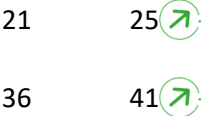
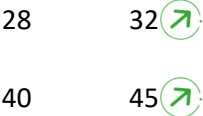
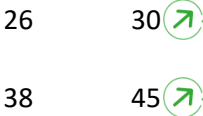
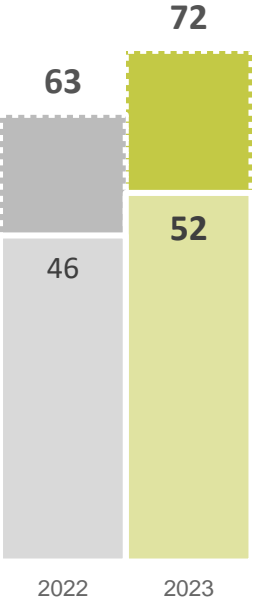
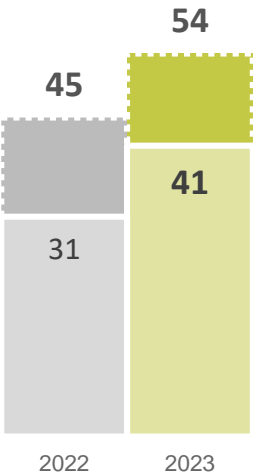
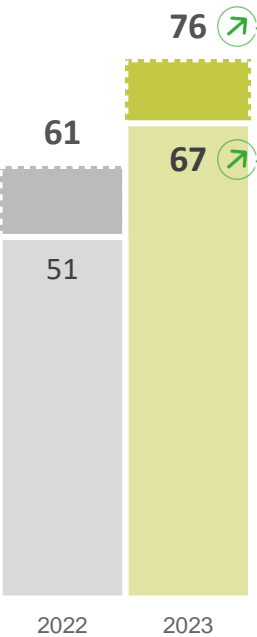
ALREADY
USING



Plug-in Hybrid

Hybrid

100% Battery
Electric Vehicle



ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Passenger car fleet

In %



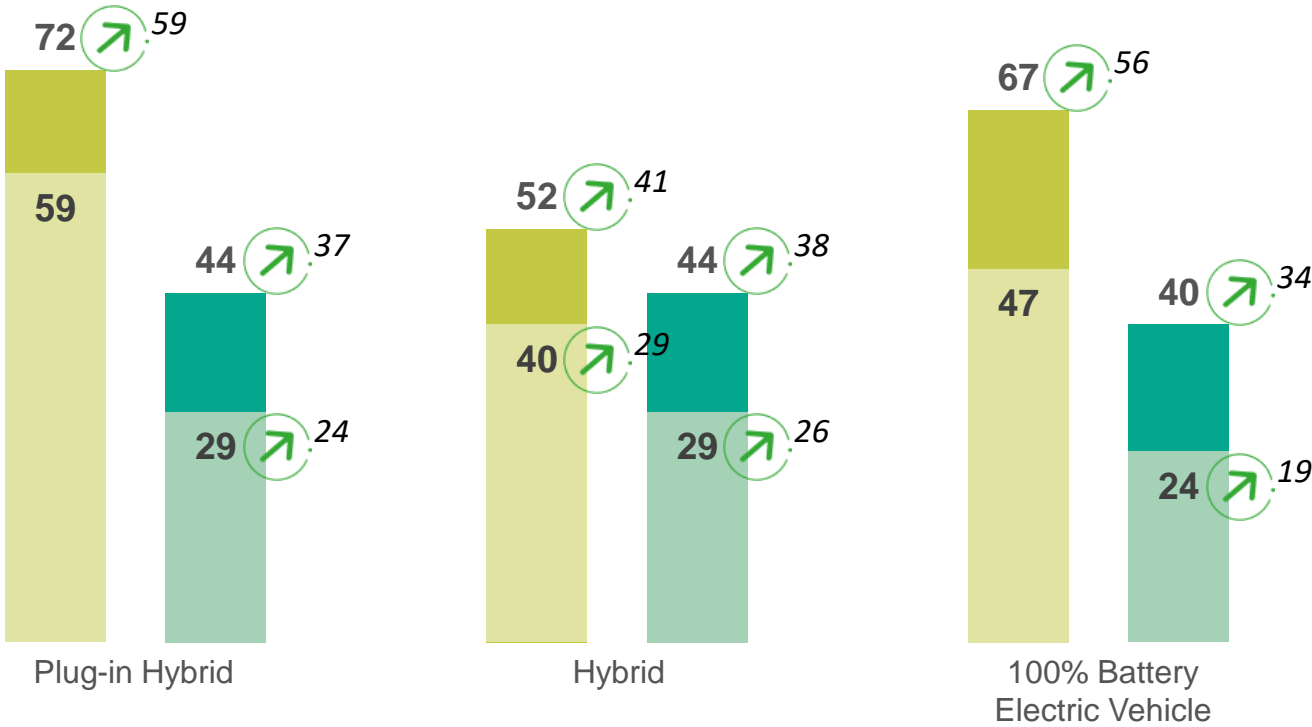
Passenger cars



ALREADY USING
OR CONSIDER
USING IN THE
NEXT 3 YEARS



ALREADY
USING



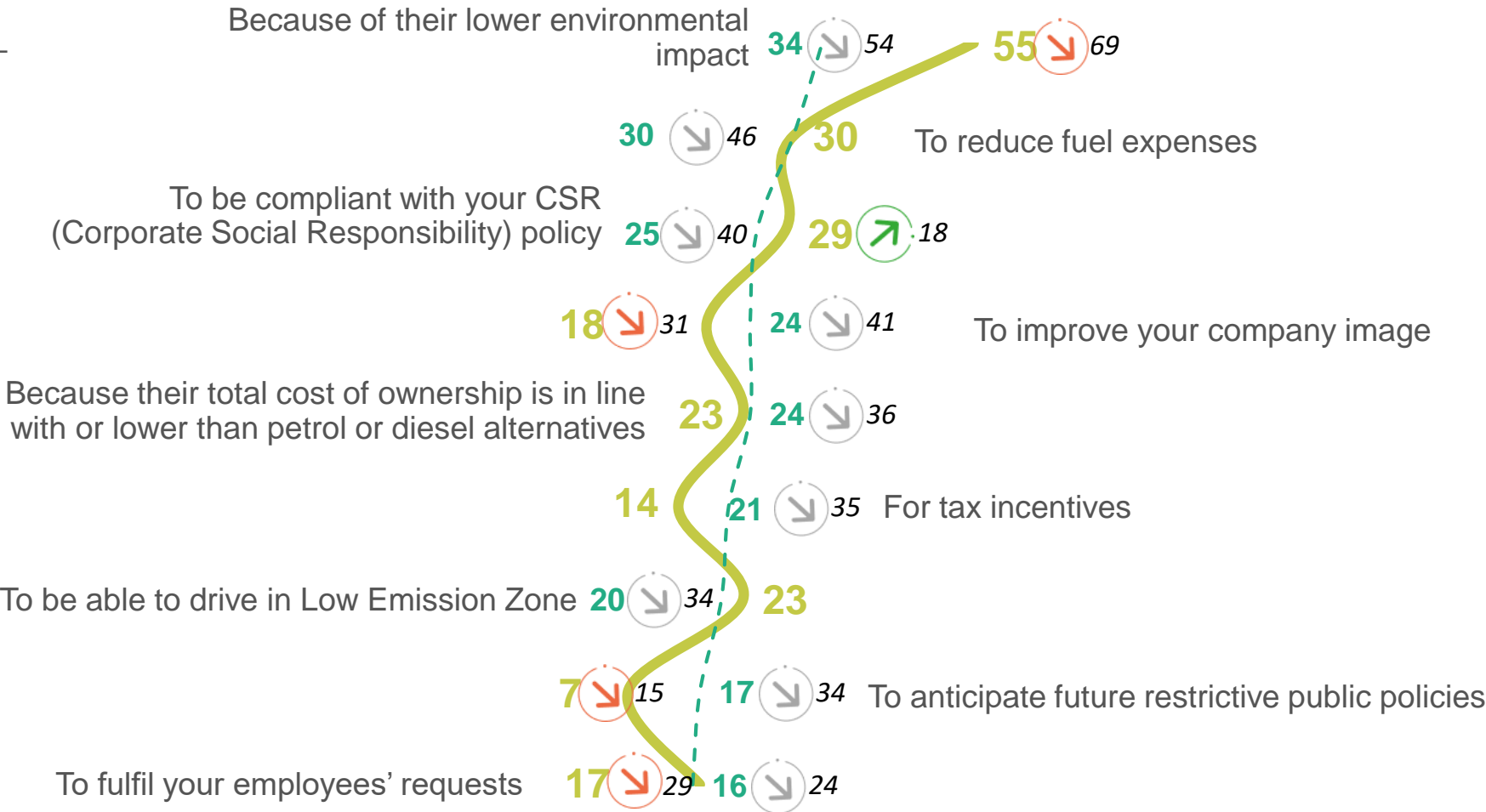
REASONS FOR IMPLEMENTING OR CONSIDERING ALTERNATIVE FUEL TECHNOLOGIES

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

HOW TO READ THE RESULTS ?

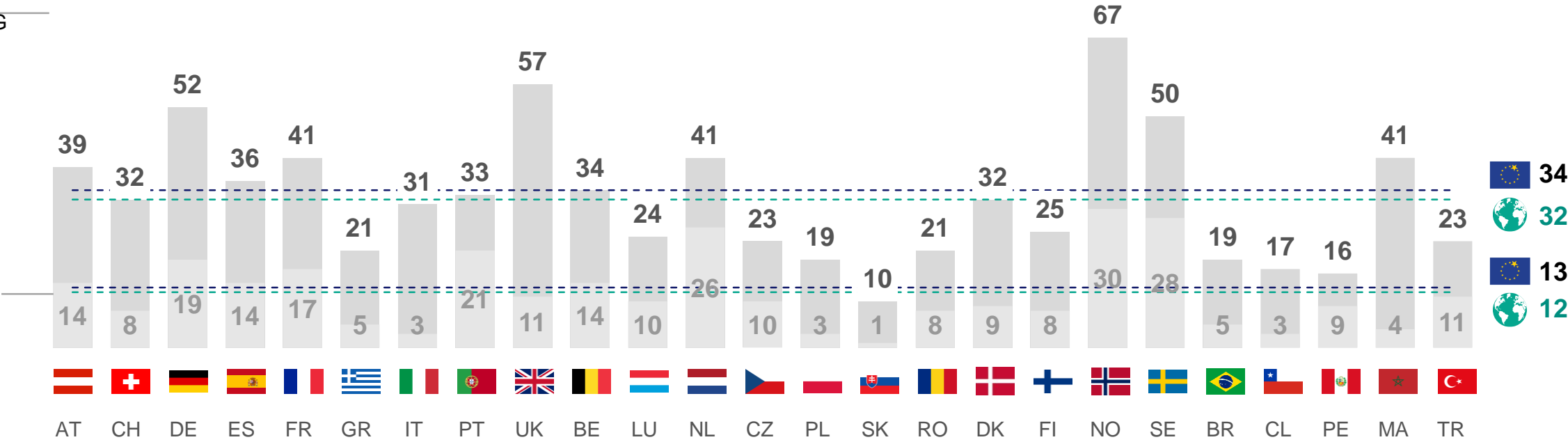
In Sweden, 50% of the companies are already using or consider to implement at least one alternative technology in the next 3 years. 28% of the companies is currently using at least one.



ALREADY USING
OR CONSIDER
USING IN THE
NEXT 3 YEARS



ALREADY
USING



EU 34

World 32

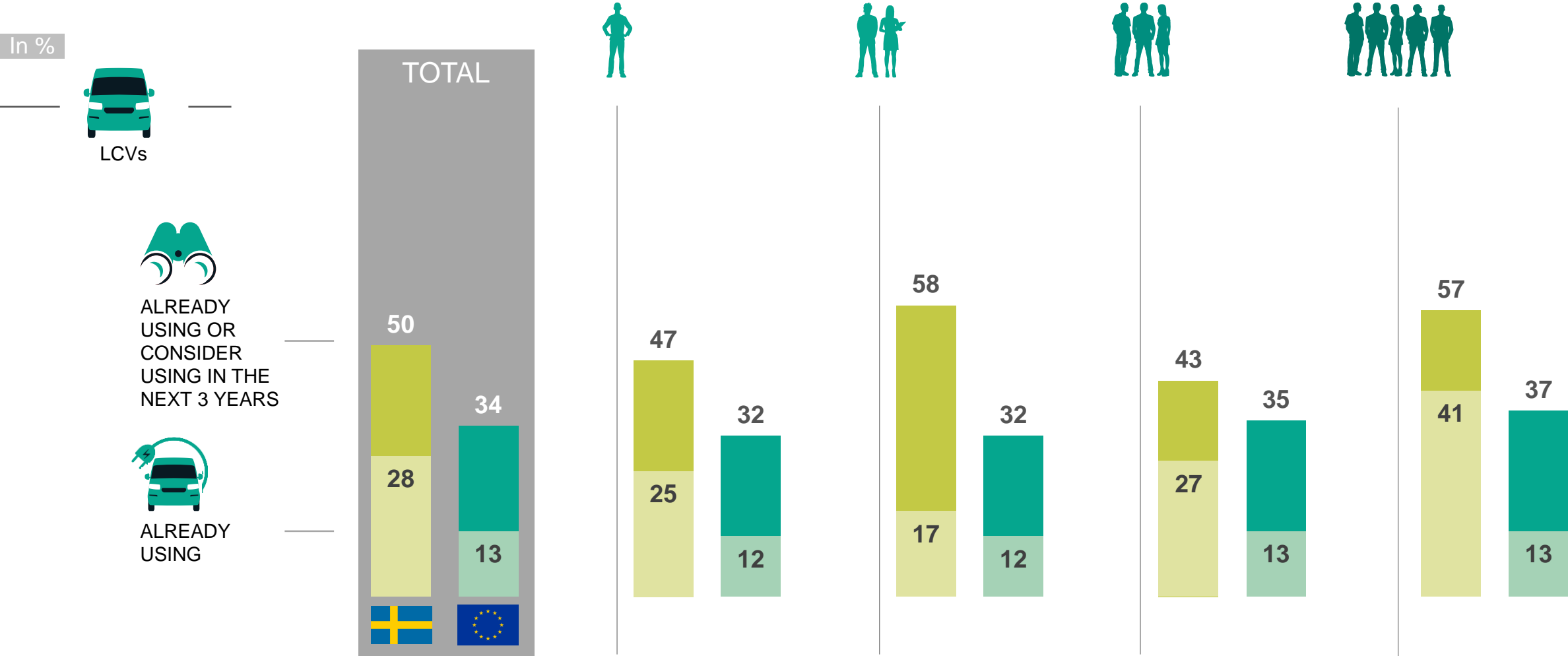
EU 13

World 12

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

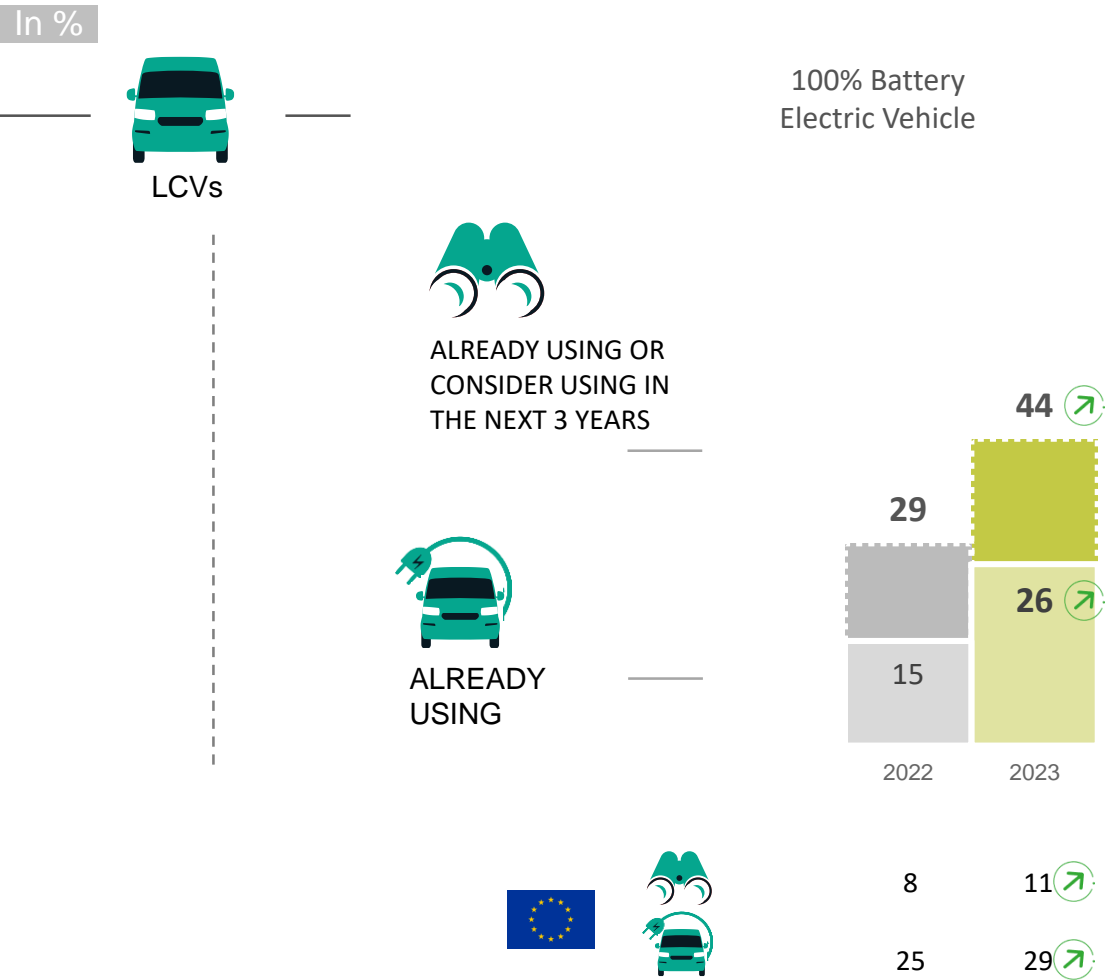
CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

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



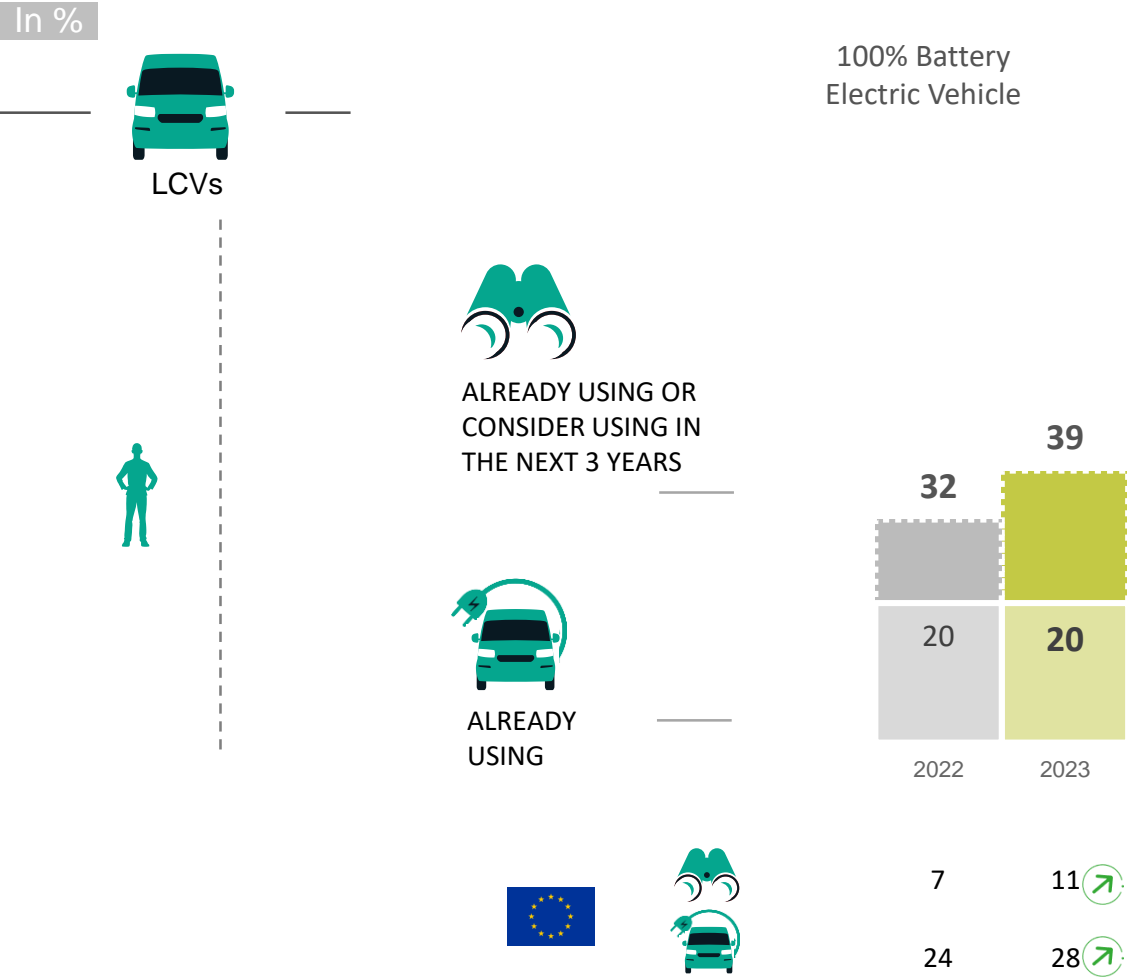
ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years



ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

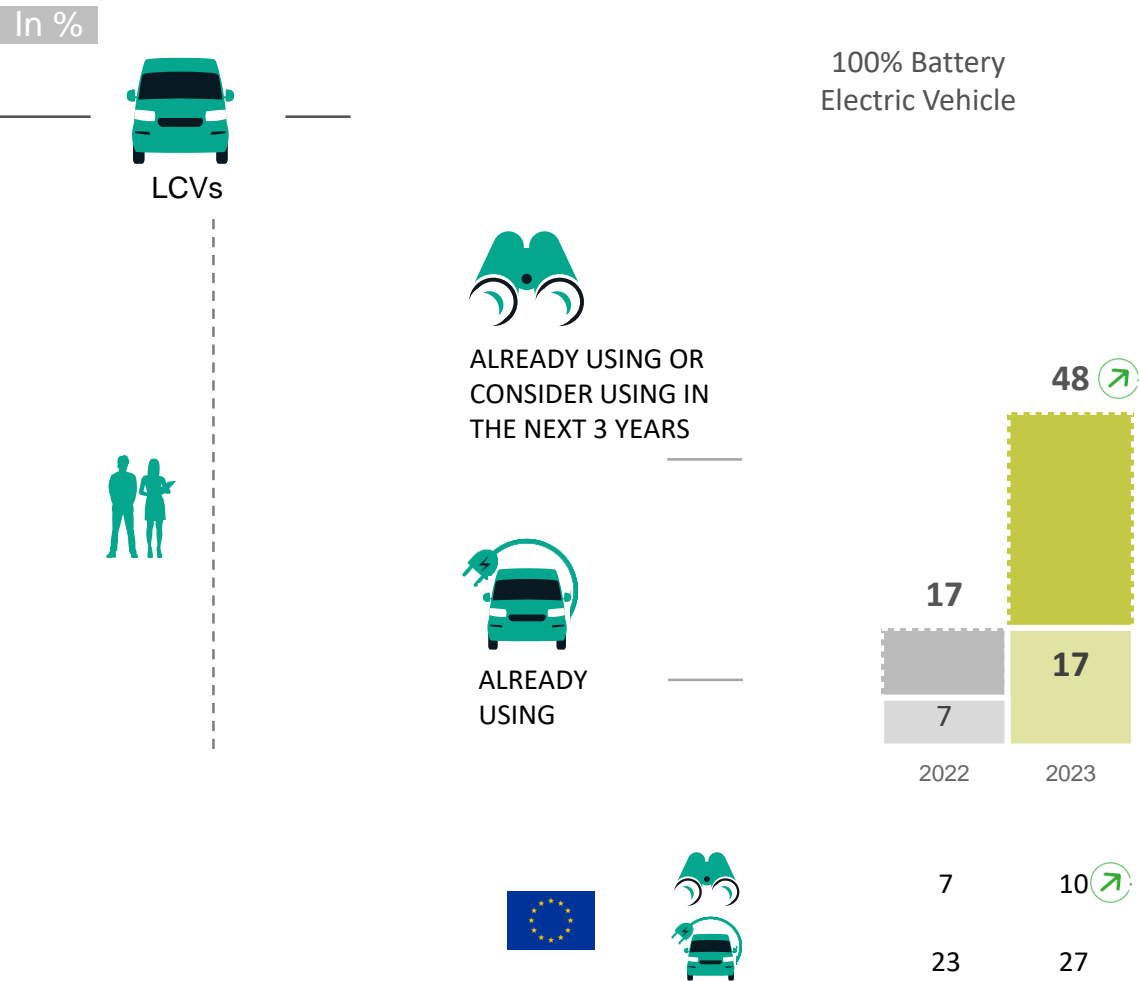
Evolution vs. previous years – Less than 10 empl.



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

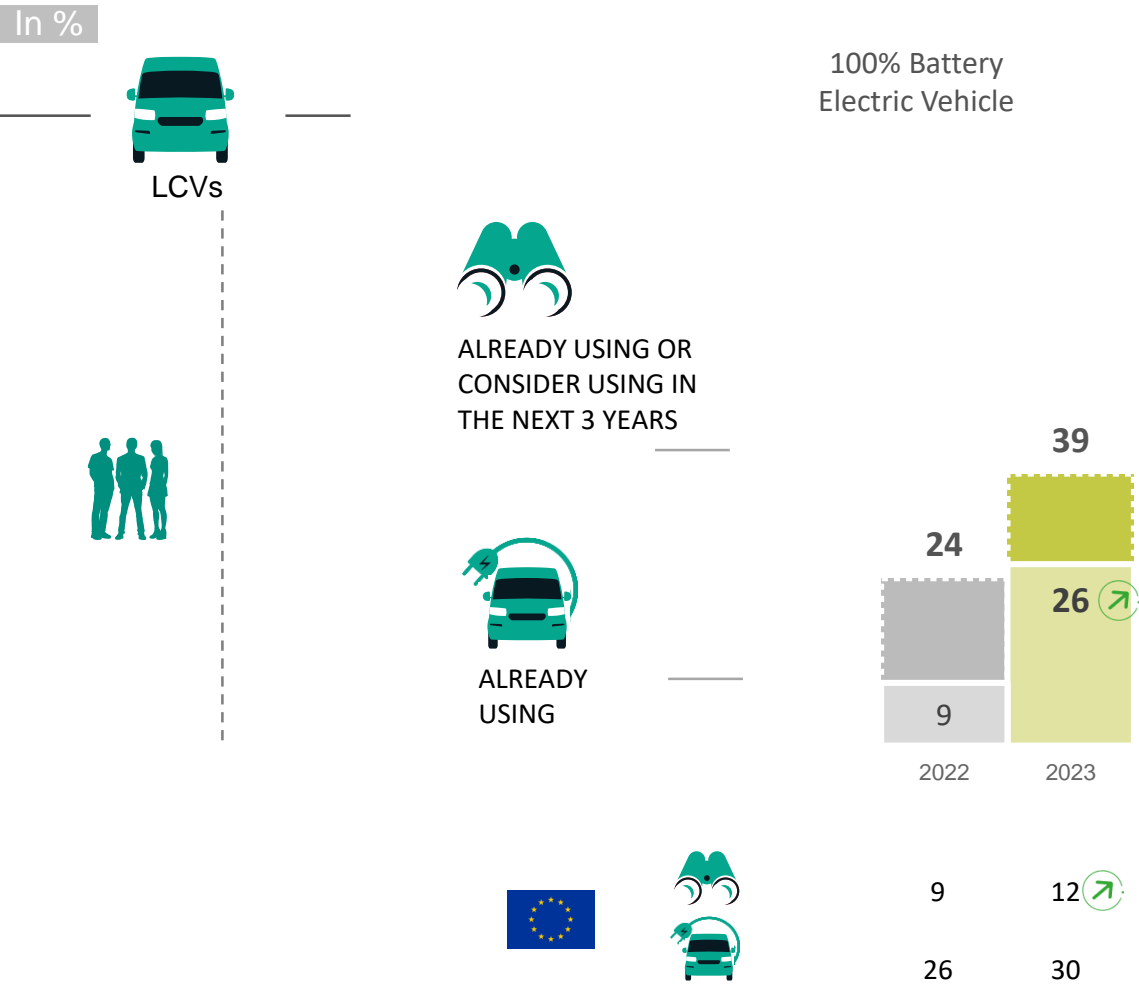
Evolution vs. previous years – 10 - 99 empl.



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

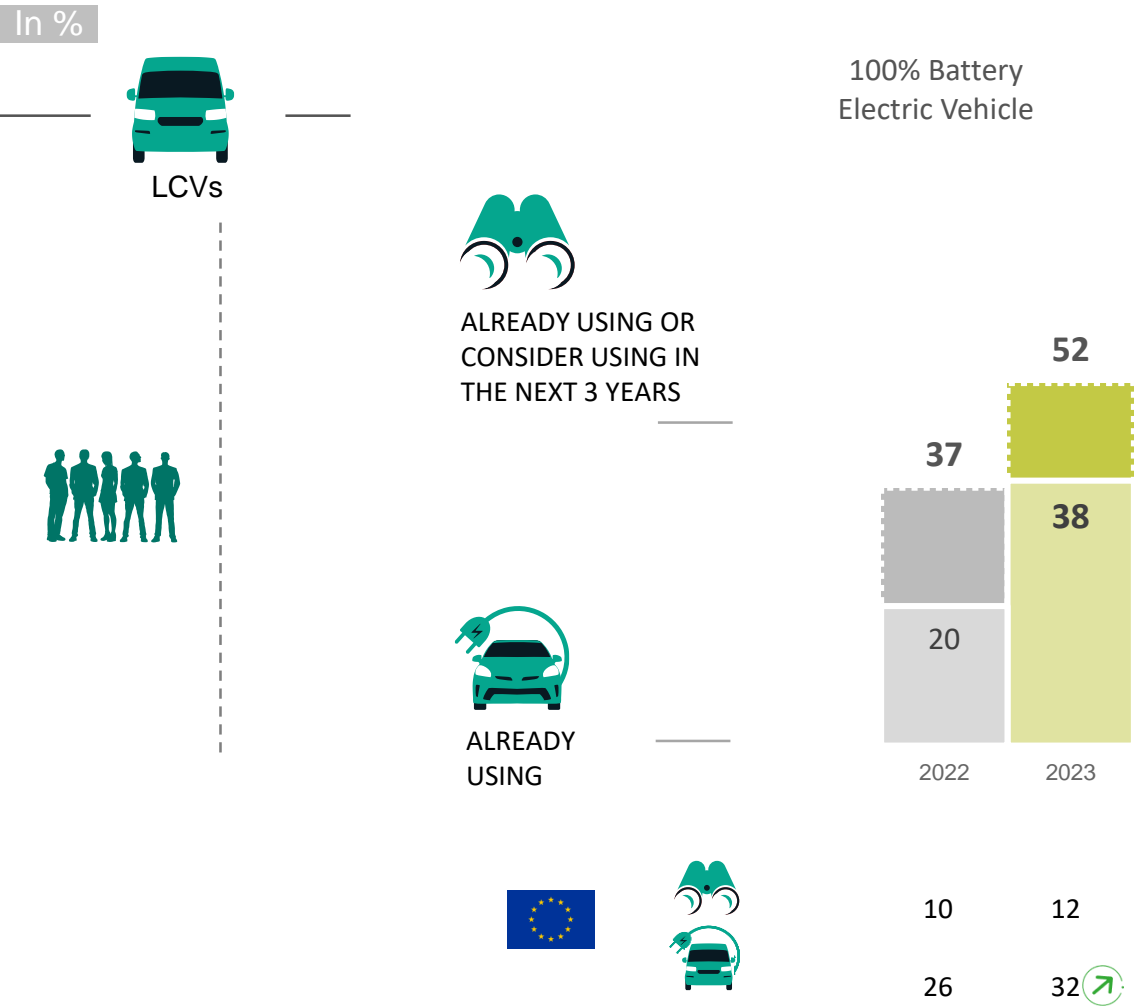
ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years – 100 - 249 empl.



ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

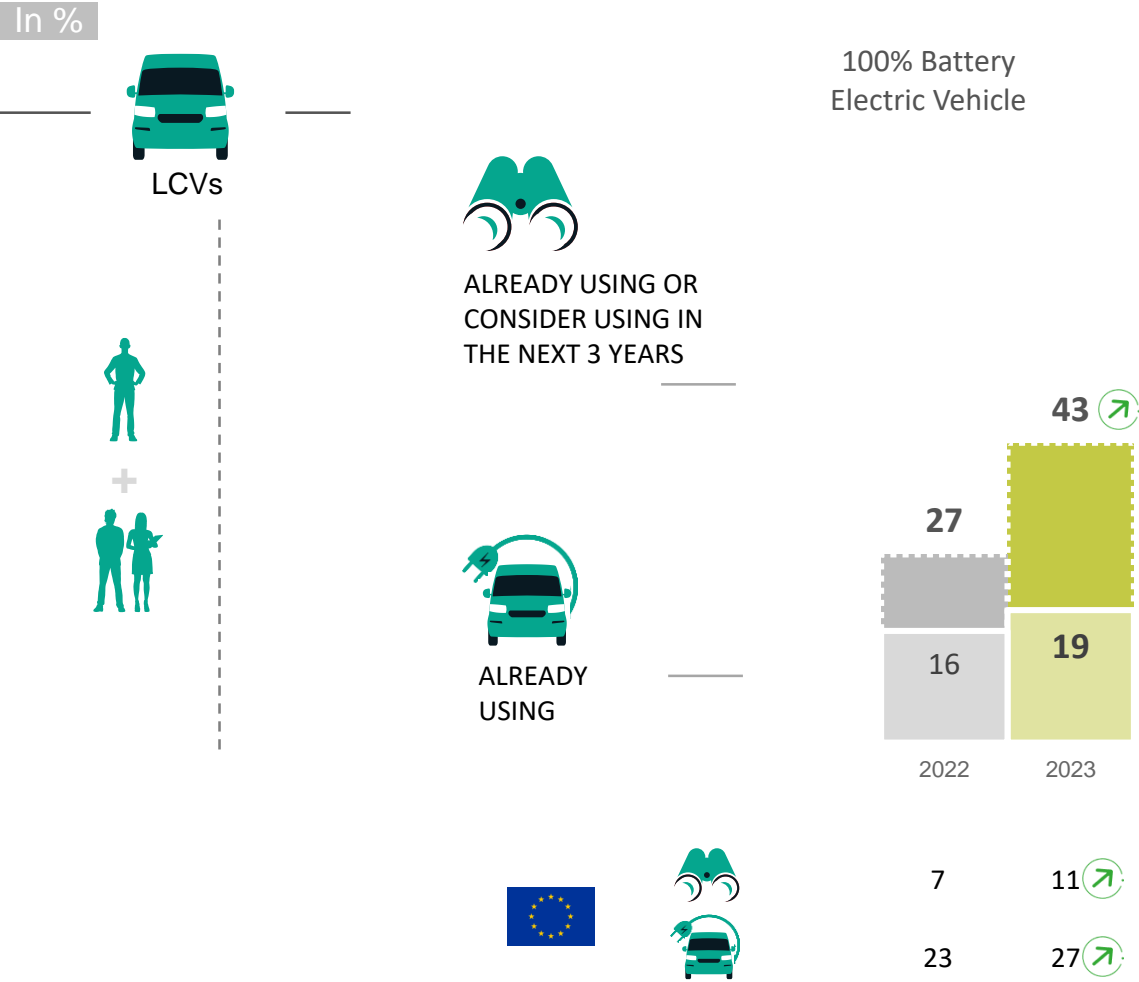
Evolution vs. previous years – 250 empl. or more



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

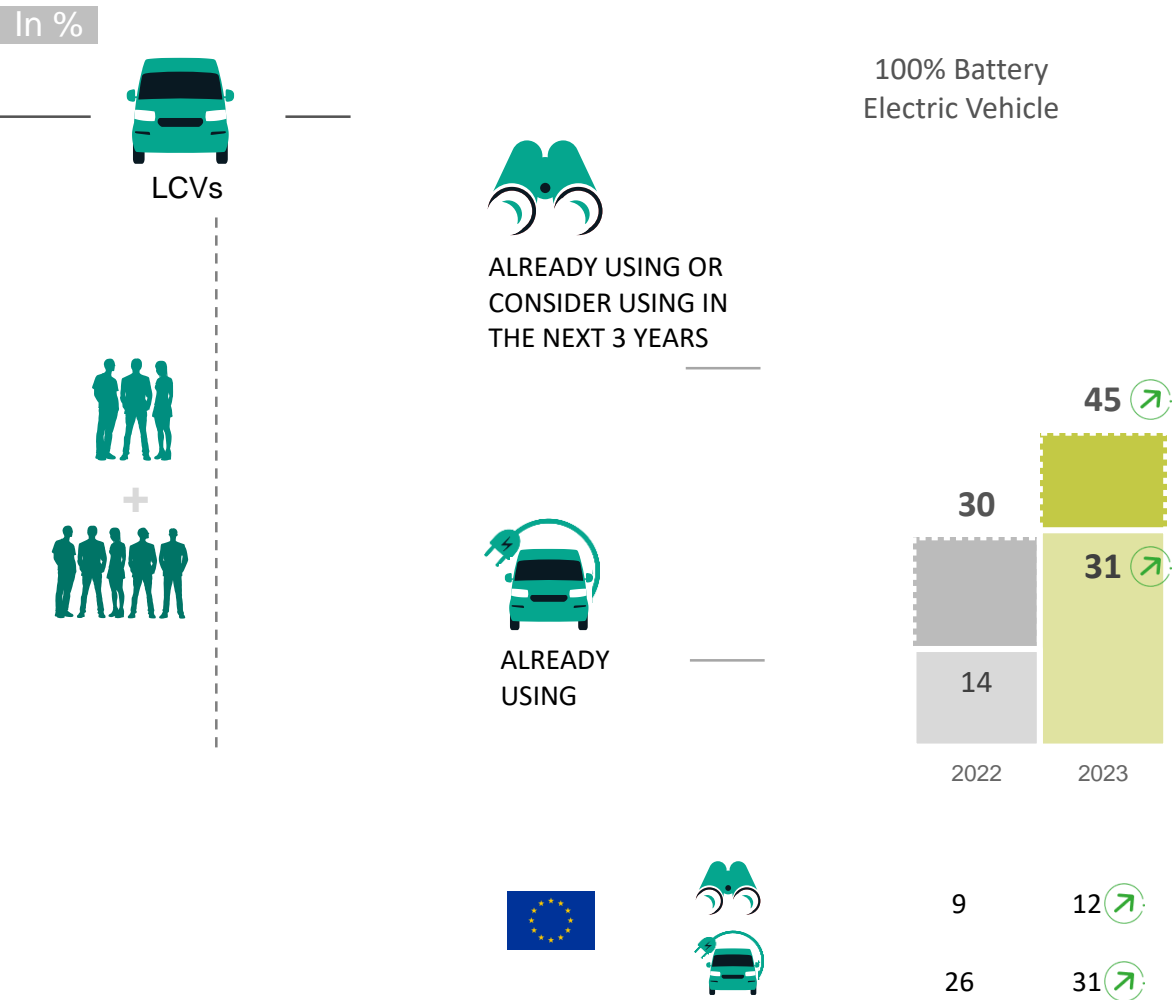
ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years – Focus on 1 to 99



ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years – Focus on 100 and more



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 %



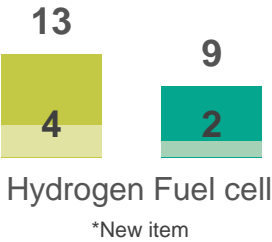
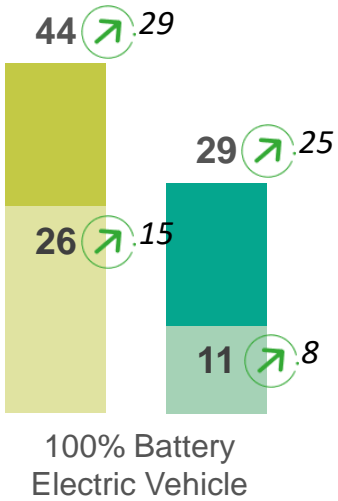
LCVs



ALREADY USING
OR CONSIDER
USING IN THE
NEXT 3 YEARS



ALREADY
IMPLEMENTED



*New item

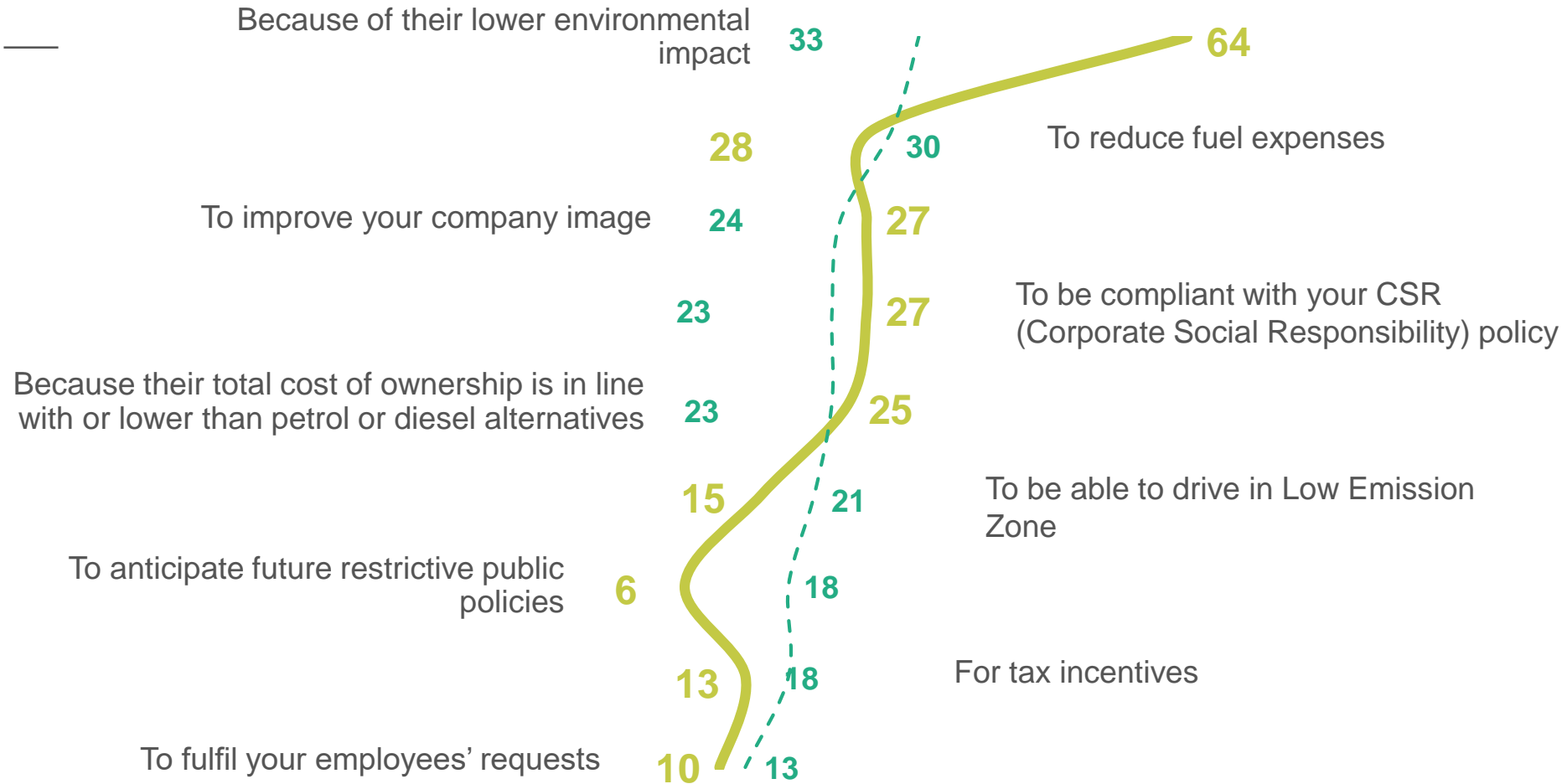
REASONS FOR IMPLEMENTING OR CONSIDERING ALTERNATIVE FUEL TECHNOLOGIES

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 for LCVs

EXPECTED FLEET SHARE PER ENERGY

HOW TO READ THE RESULTS ?

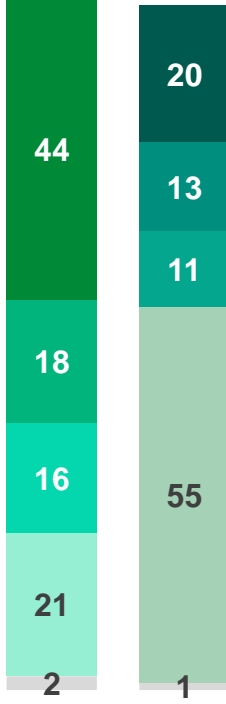
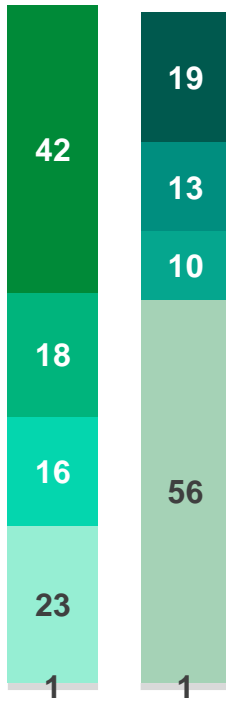
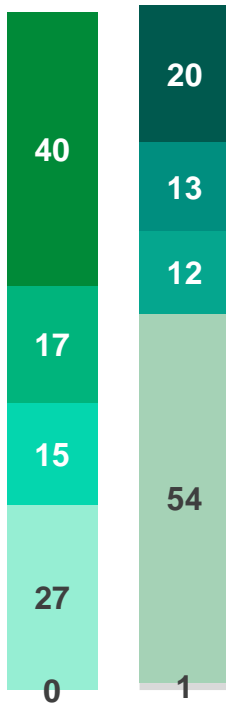
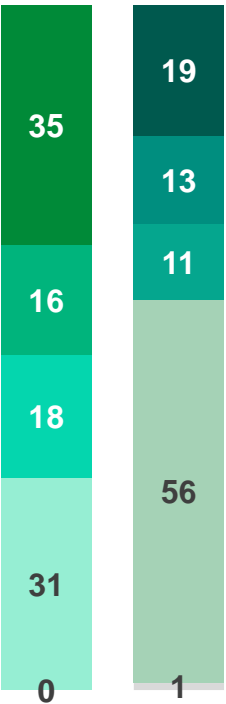
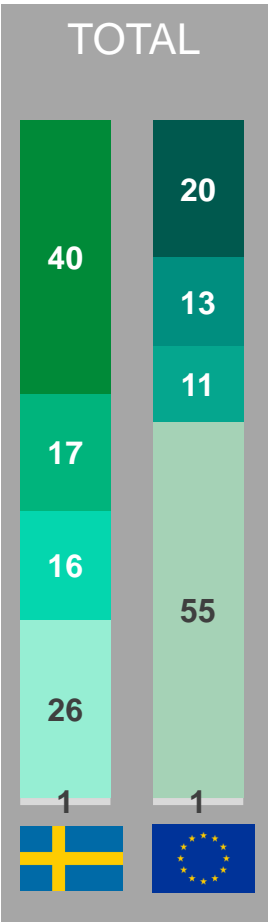
In Sweden in 3 years, 40% of the companies passenger car fleet will be 100% BEV.

In %



Passenger cars

- 100% battery electric
- Plug-in Hybrid
- Hybrid
- Petrol or Diesel
- Other



This question has been asked differently in 2023, no comparison vs 2022
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 %

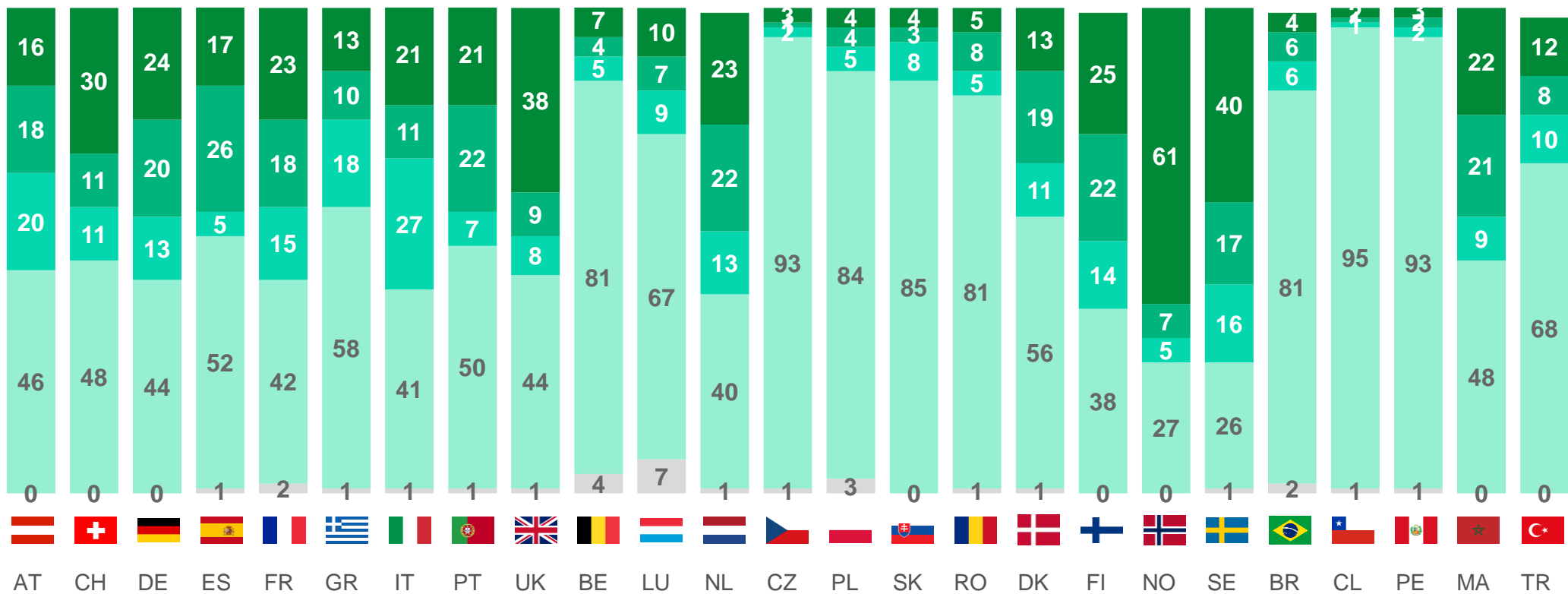


Passenger cars

HOW TO READ THE RESULTS ?

In Sweden in 3 years, 40% of the companies passenger car fleet will be 100% BEV.

- 100% battery electric
- Plug-in Hybrid
- Hybrid
- Petrol or Diesel
- Other



This question has been asked differently in 2023, no comparison vs 2022
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 %

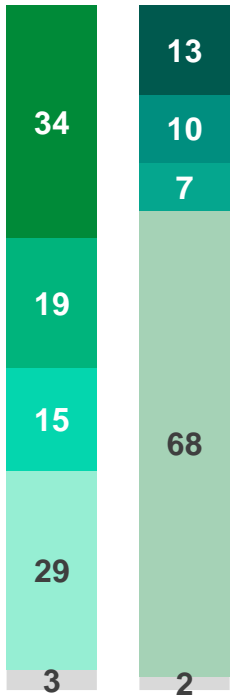
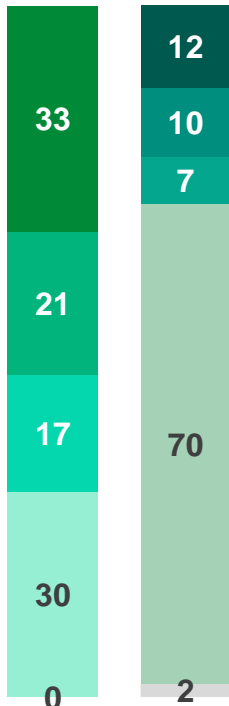
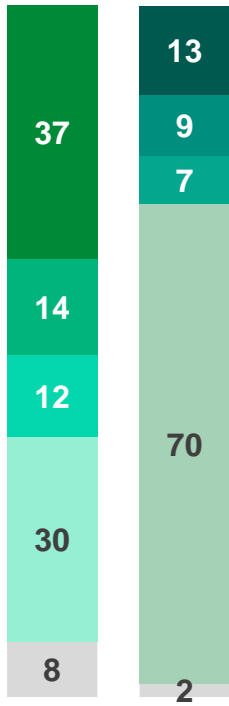
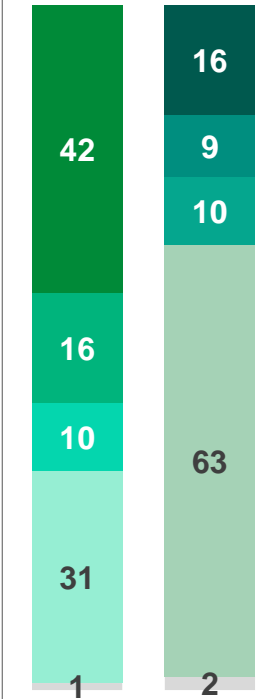
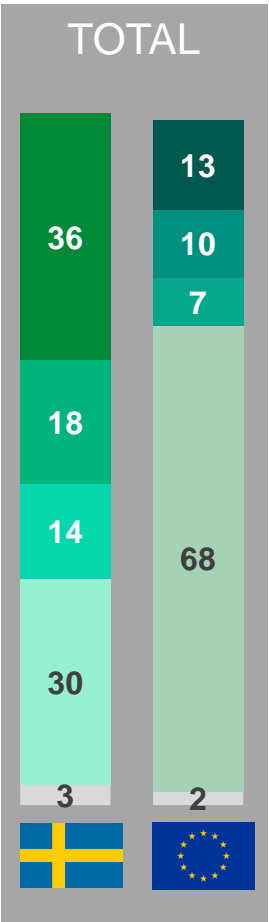


LCVs

HOW TO READ THE RESULTS ?

In Sweden in 3 years, 36% of the light commercial vehicle fleet will be 100% BEV.

- 100% battery electric
- Plug-in Hybrid
- Hybrid
- Petrol or Diesel
- Other



This question has been asked differently in 2023, no comparison vs 2022

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 %

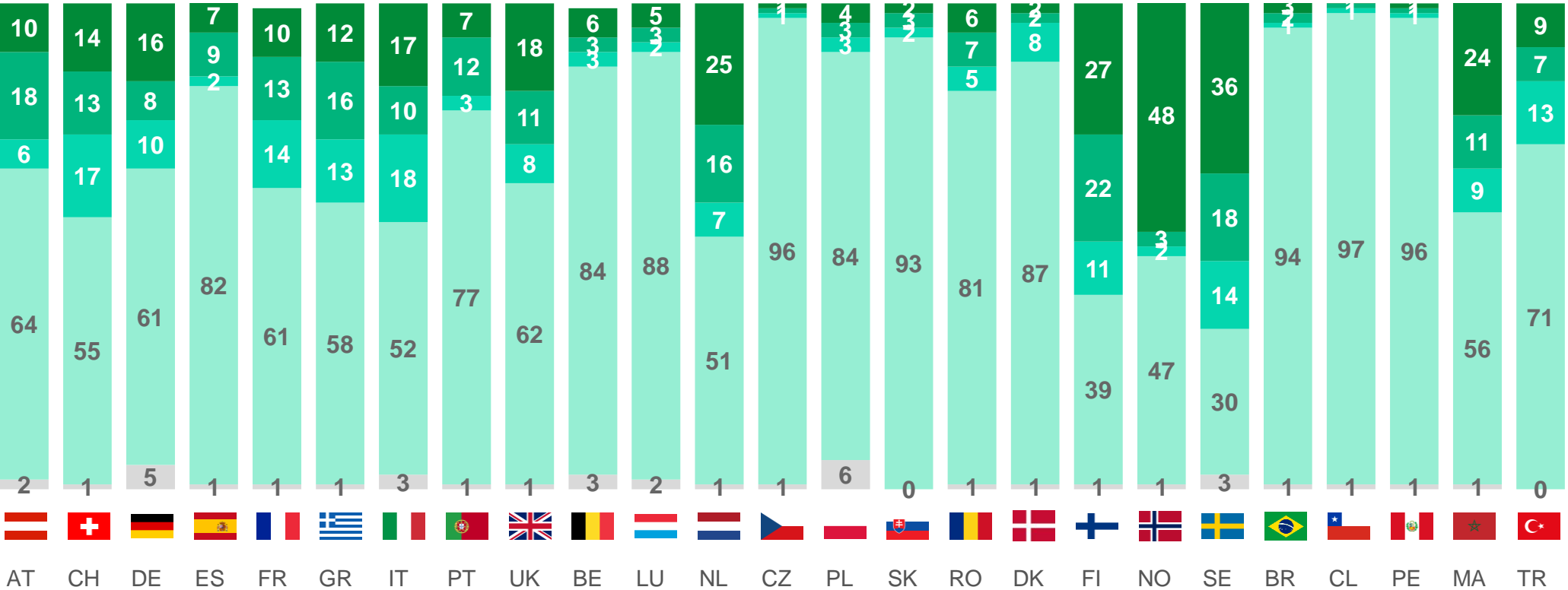


LCVs

HOW TO READ THE RESULTS ?

In Sweden in 3 years, 36% of the light commercial vehicle fleet will be 100% BEV.

100% battery electric
Plug-in Hybrid
Hybrid
Petrol or Diesel
Other



This question has been asked differently in 2023, no comparison vs 2022
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

5

ENERGY MIX FOCUS PER ALTERNATIVE TECHNOLOGY



HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %



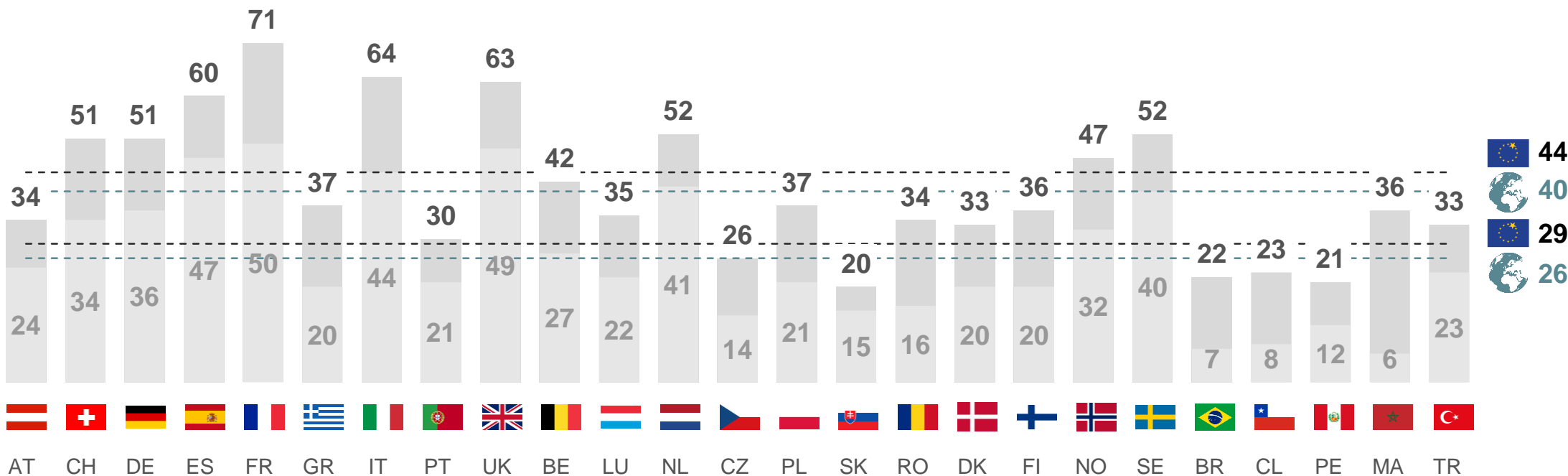
Passenger cars



ALREADY USING
OR CONSIDER
USING IN THE
NEXT 3 YEARS

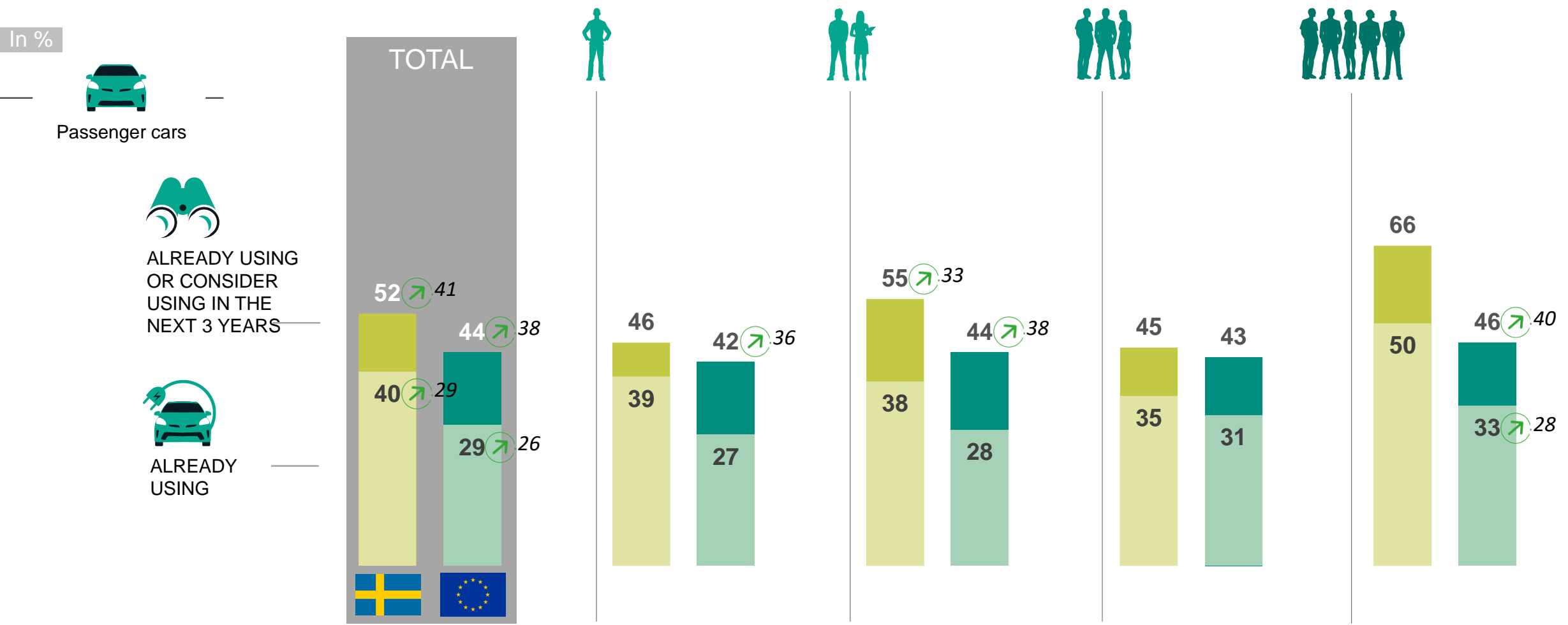


ALREADY
USING



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



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 %



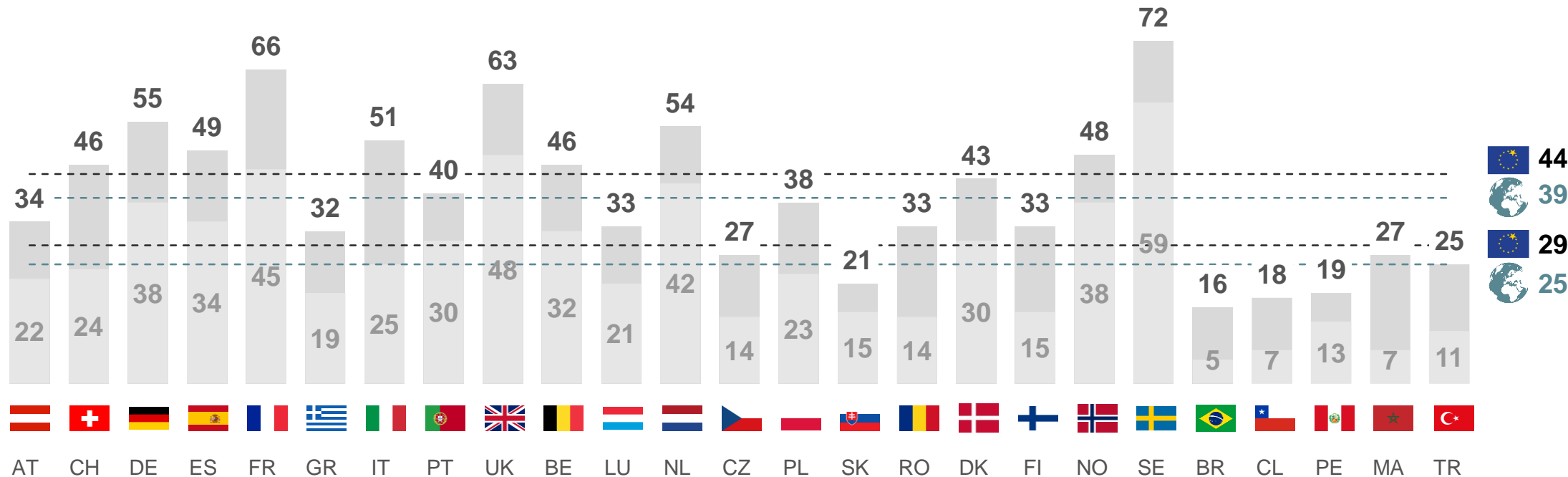
Passenger cars



ALREADY USING
OR CONSIDER
USING IN THE
NEXT 3 YEARS

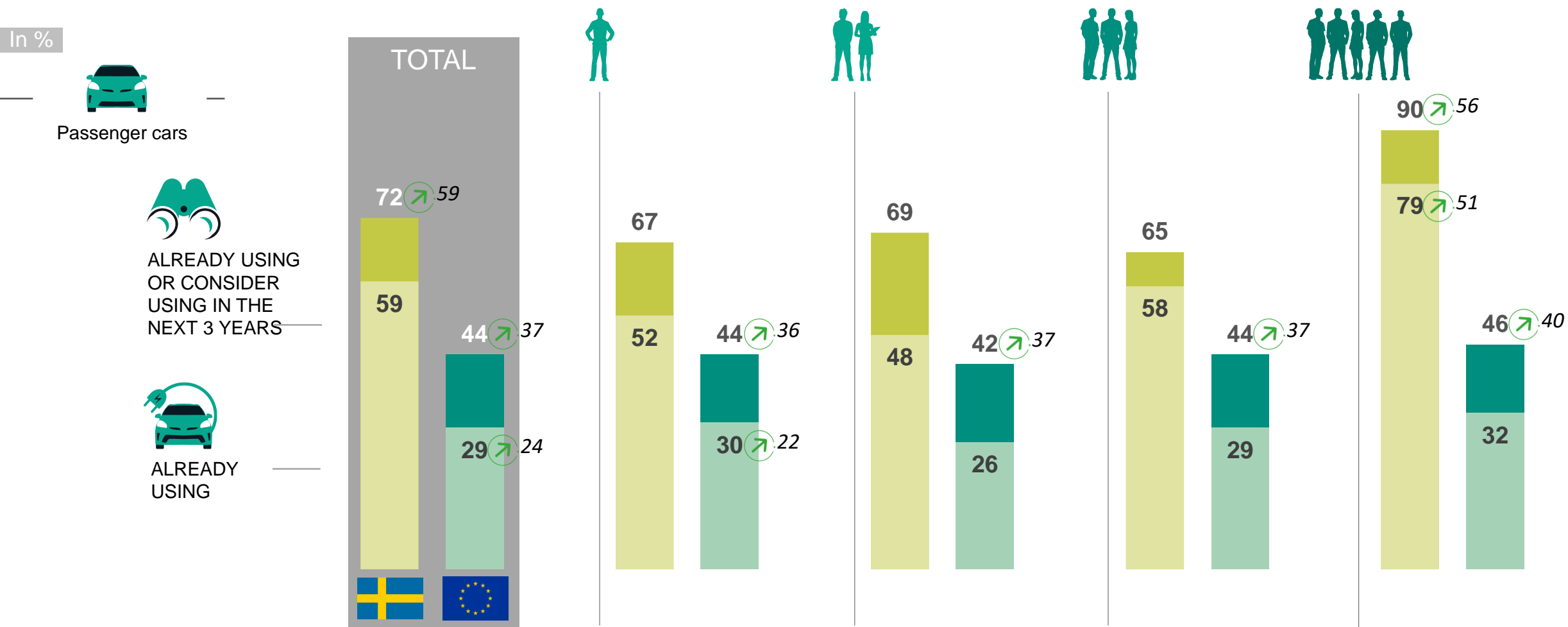


ALREADY
USING



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
80

PLUG-IN HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY



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

100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %



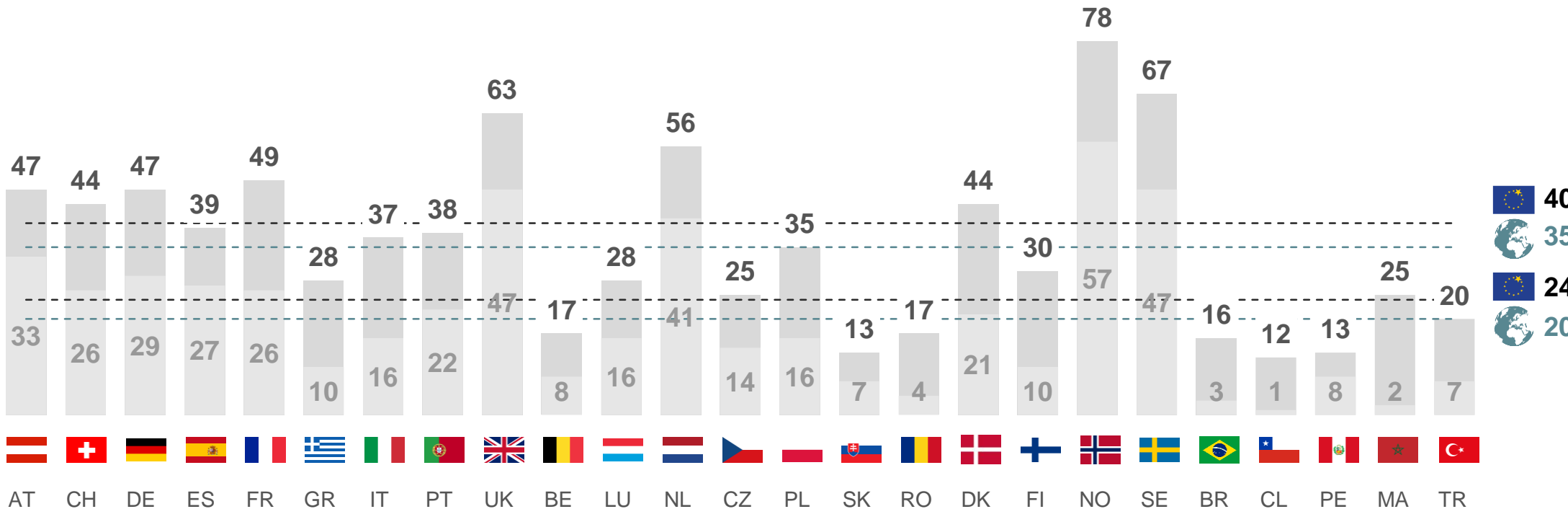
Passenger cars



ALREADY USING
OR CONSIDER
USING IN THE
NEXT 3 YEARS

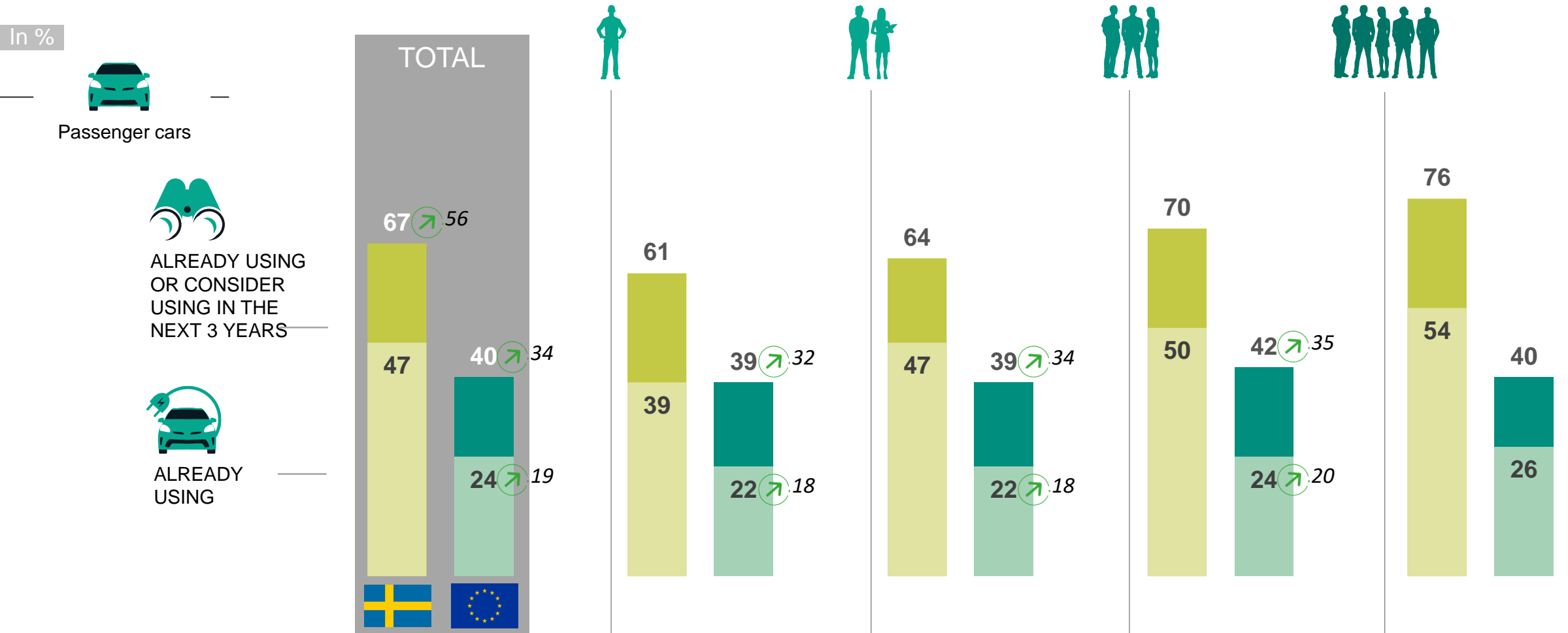


ALREADY
USING



EU 40
World 35
EU 24
World 20

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 passenger cars

100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %



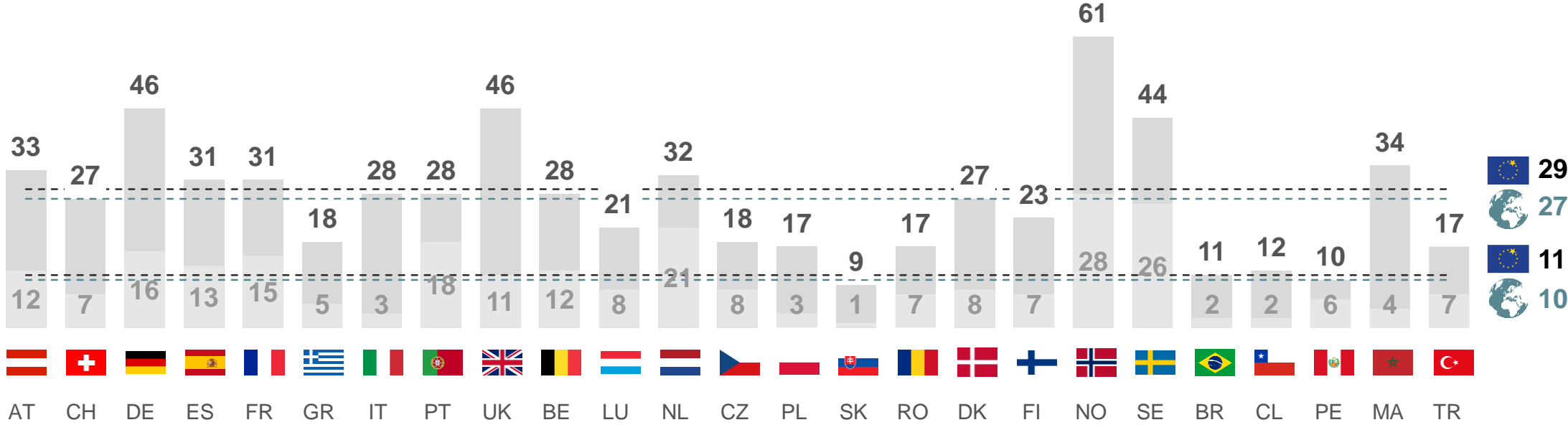
LCVs



ALREADY USING
OR CONSIDER
USING IN THE
NEXT 3 YEARS



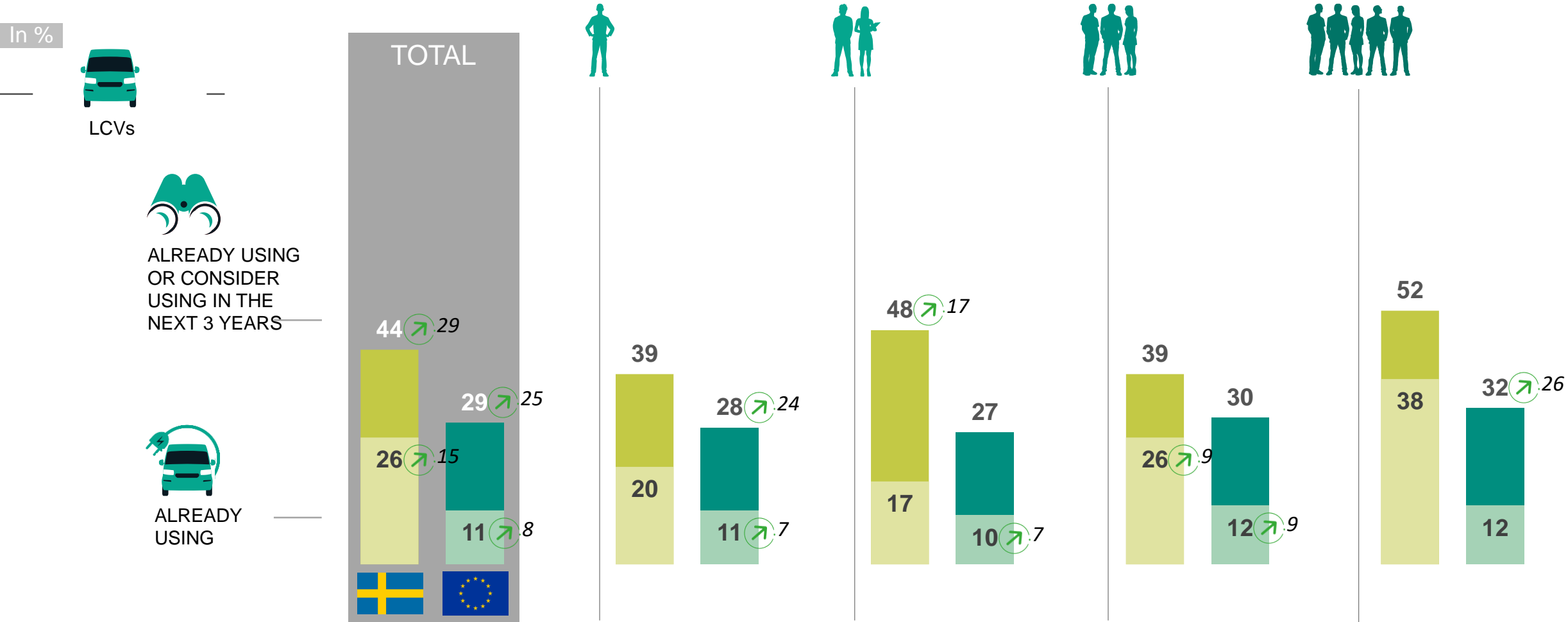
ALREADY
USING



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

HYDROGEN FUEL CELL ELECTRIC VEHICLE : IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %



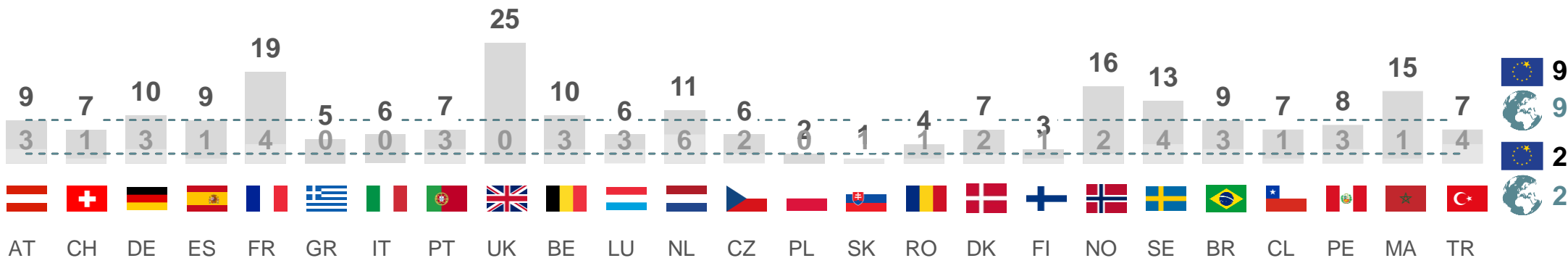
LCVs



ALREADY USING
OR CONSIDER
USING IN THE
NEXT 3 YEARS



ALREADY
USING

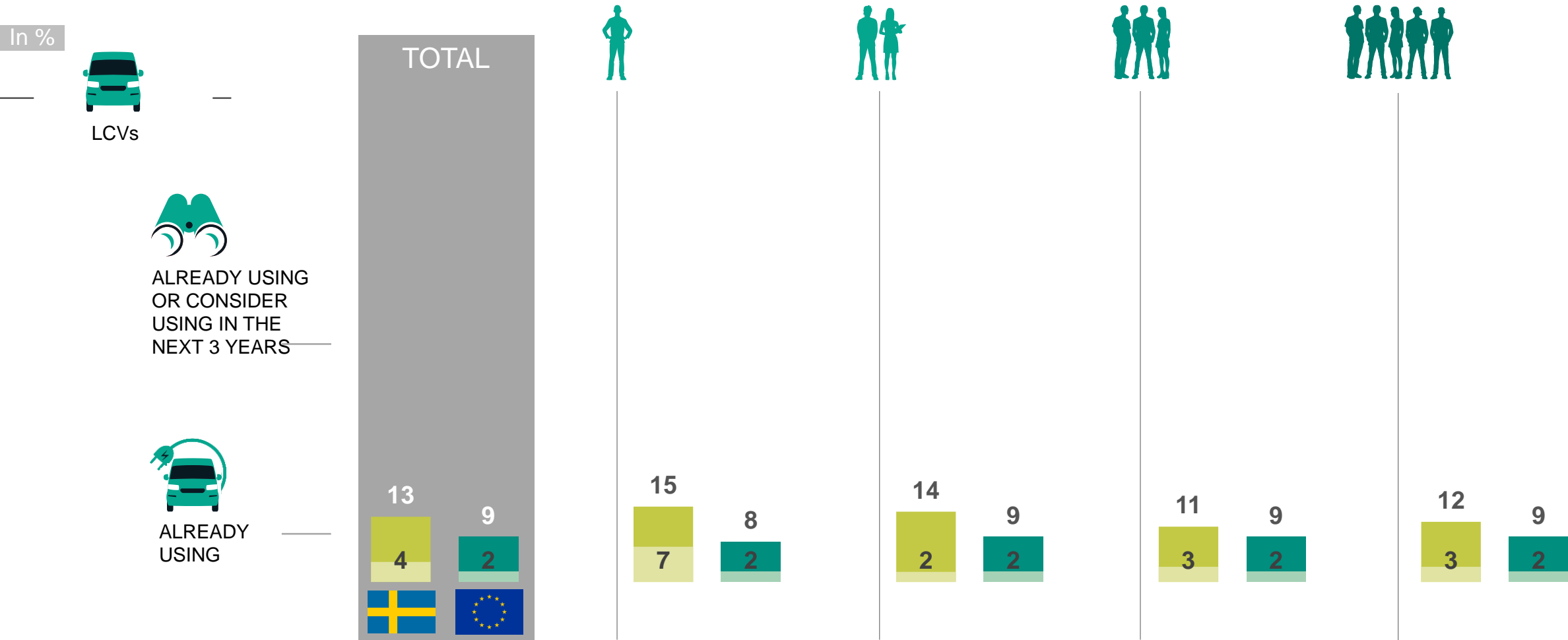


New item added in 2023

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

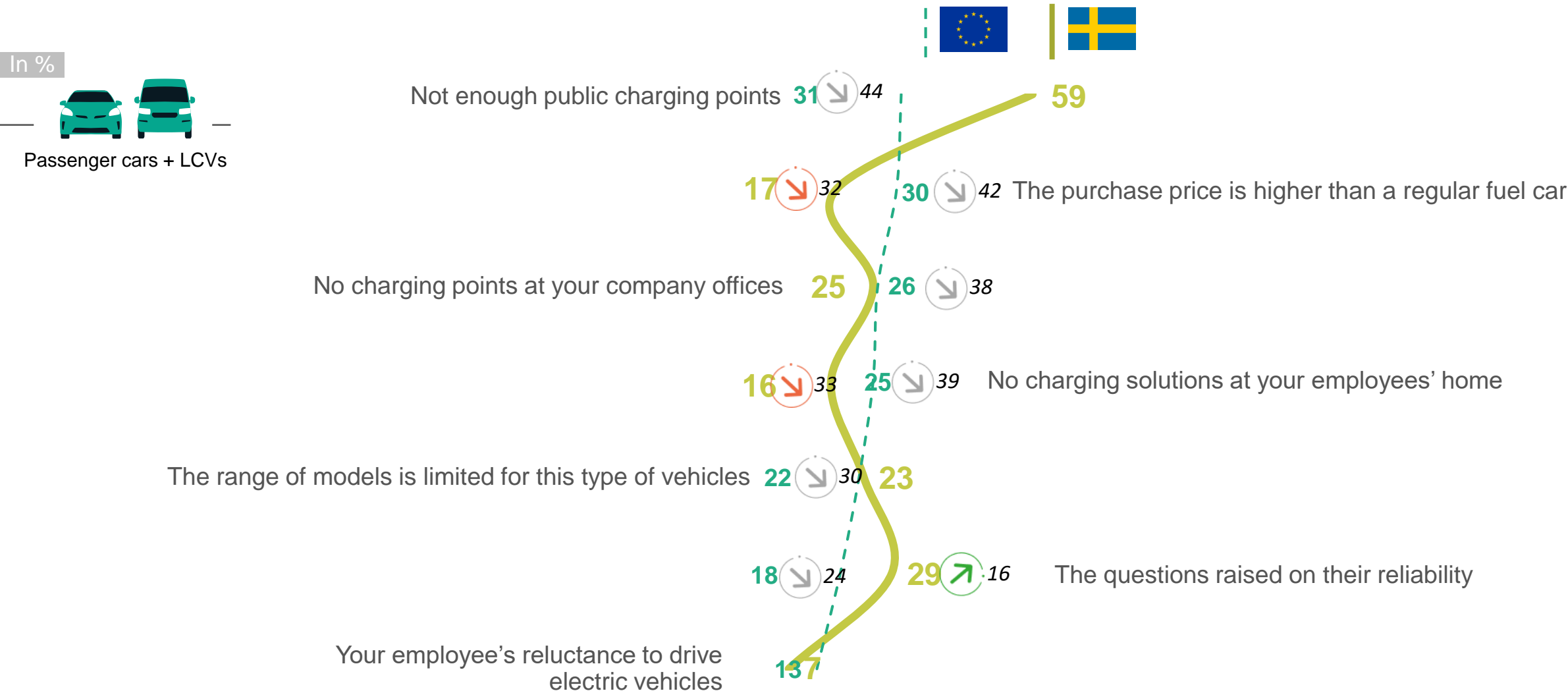
HYDROGEN FUEL CELL ELECTRIC VEHICLE : IMPLEMENTATION WITHIN COMPANY FLEET POLICY



New item added in 2023

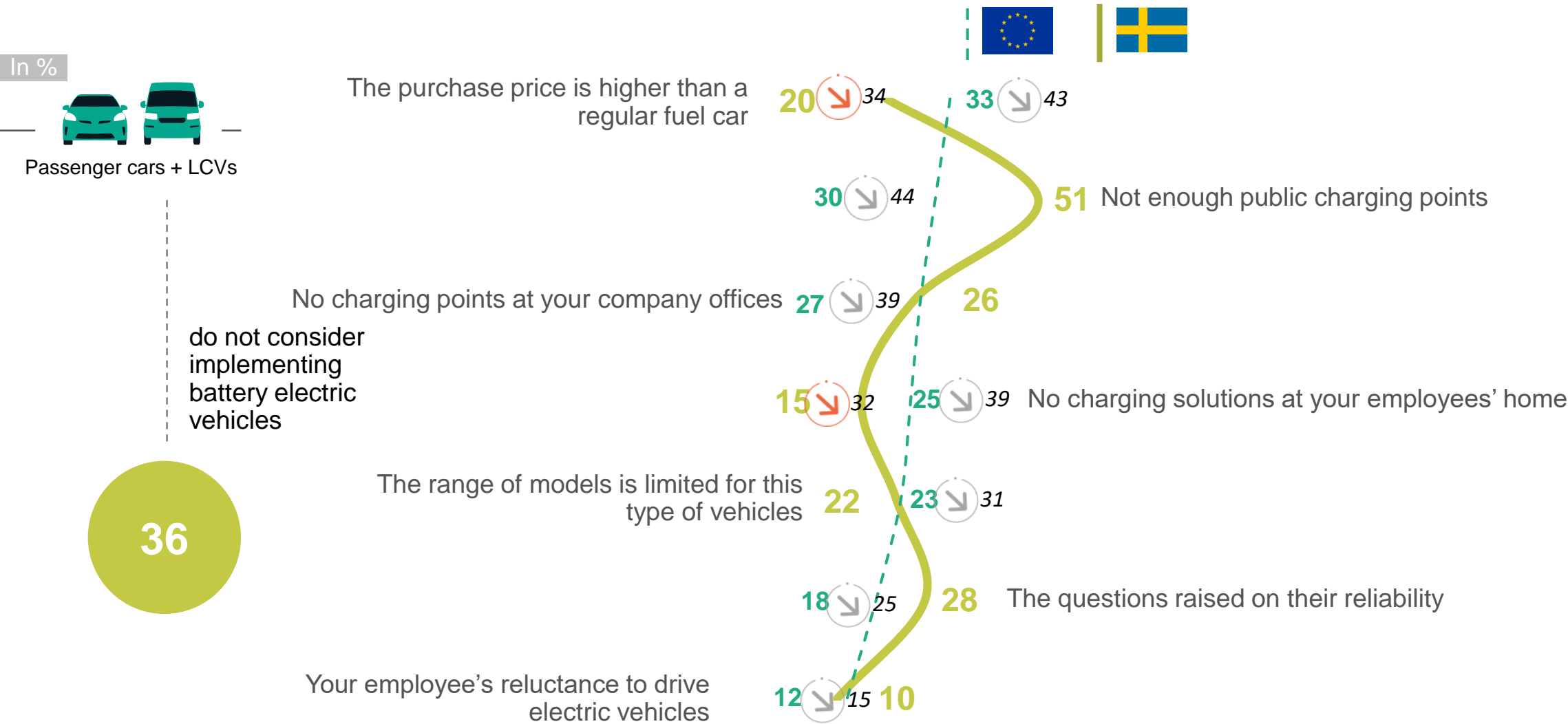
Amongst the following alternative fuel technologies, which ones do you currently use...?
Amongst the following alternative fuel technologies, which ones are you considering using...?
Basis: companies with LCVs

CONSTRAINTS OF 100% BATTERY ELECTRIC VEHICLE USAGE



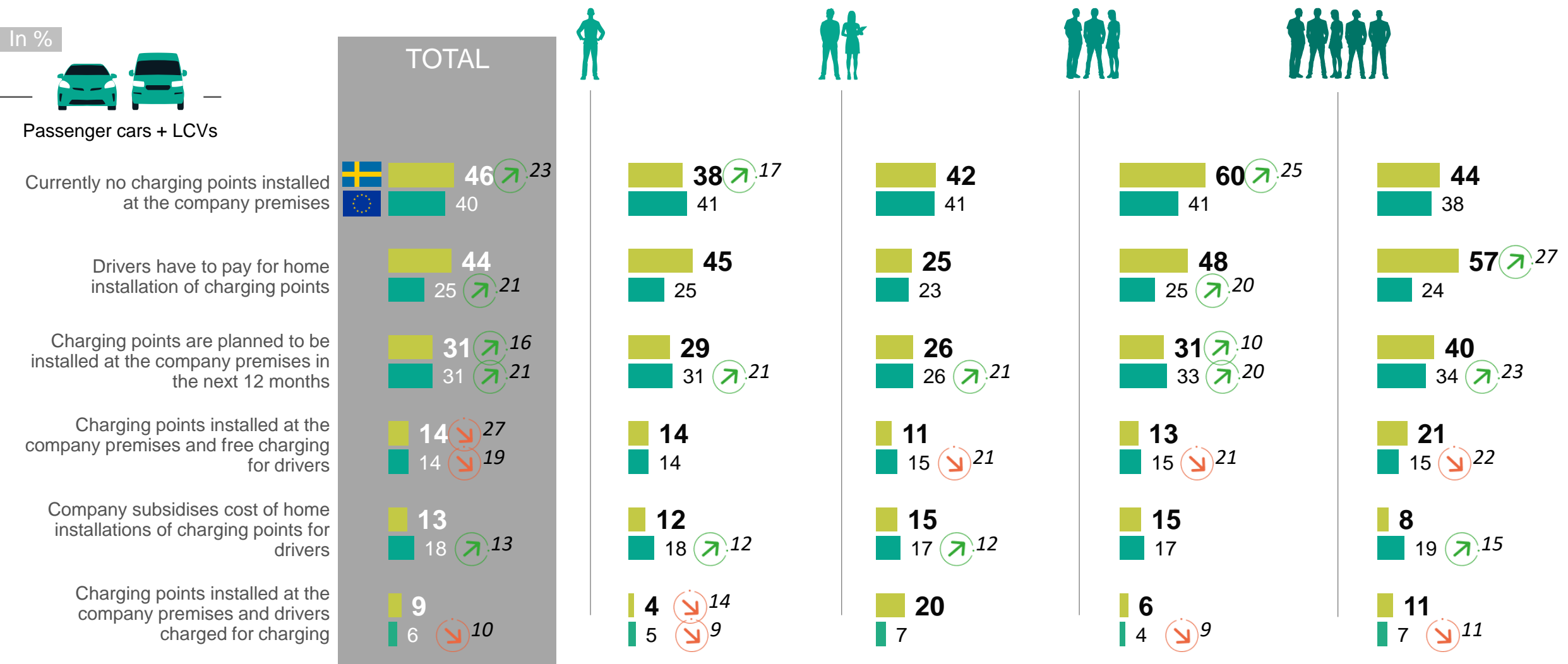
What are the constraints of using 100% Battery Electric vehicles?
Basis: Know 100% BEV technology

CONSTRAINTS OF 100% BATTERY ELECTRIC VEHICLE USAGE



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

ACCESS TO CHARGING POINTS

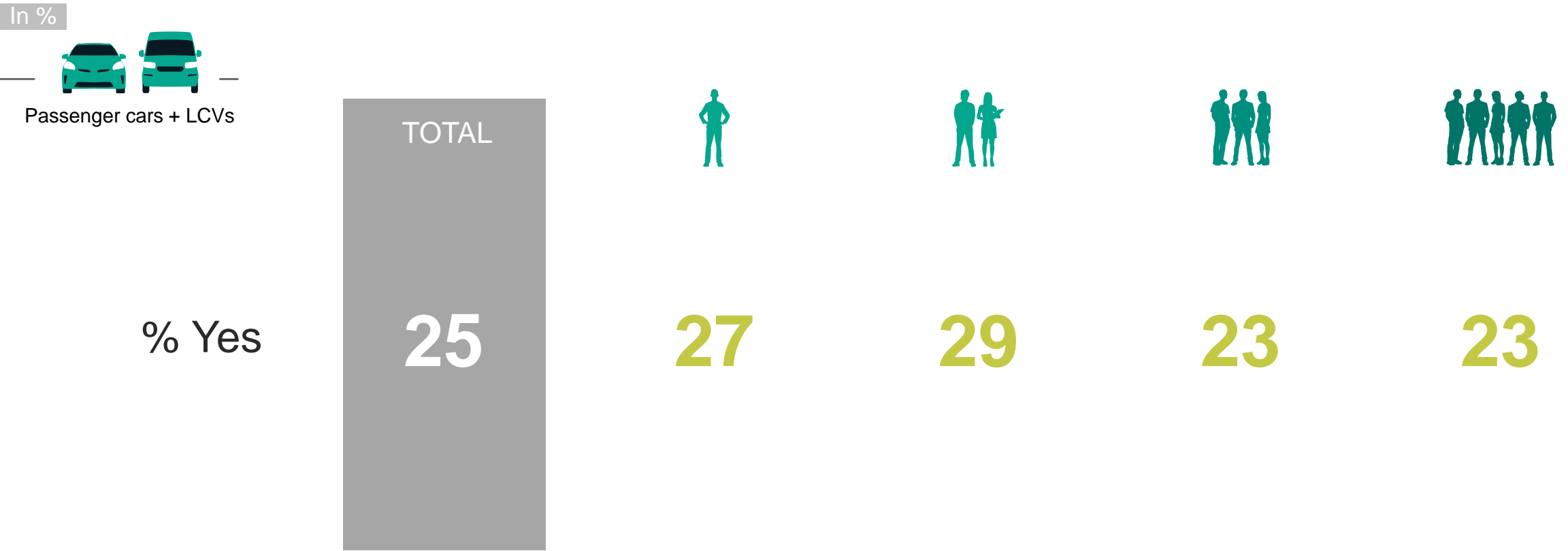


Multiple answers - % don't add up to 100%

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

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

SUPPORTING DRIVERS FOR THE INSTALLATION OF CHARGING POINTS



6

WHAT ARE THE PERSPECTIVES IN TERMS OF MOBILITY SOLUTIONS?



MOBILITY SOLUTIONS



TOP 3 USED SOLUTIONS

#1 Ride sharing: where several employees travel in the same car to the same destination



36%



19%

#2 A short or mid term rental vehicle to provide mobility for an employee

27%

19%

#3 Public transport

22%

21%



TOP 3 POTENTIAL NEXT 3 YEARS

#1 Ride sharing: where several employees travel in the same car to the same destination



40%



28%

#2 A short or mid term rental vehicle to provide mobility for an employee

35%

28%

#3 Bike (or other two wheels) sharing / bike (or other two wheels) leasing: solution provided by the company

33%

29%



HIGH PENETRATION OF MOBILITY SOLUTIONS, DRIVEN BY THE SMALLEST COMPANIES

To note : in 2023, were interrogated only respondents that are aware of mobility solutions, which means almost 81% of overall population (no impact on the representativity of the results). One third of the respondents were managing directors.

And a new mobility solution was tested “car or cash allowance”, allowing no comparison of mobility solutions implementation vs 2022.

1

- In 2023, **76% of Swedish companies have already implemented at least one mobility solution**, ahead of the European average. This high level is **driven by the smallest companies** which have definitely caught up bigger ones in terms of mobility solutions implementation. 27% of them have implemented a mobility plan in 2023 (versus 14% last year).

2

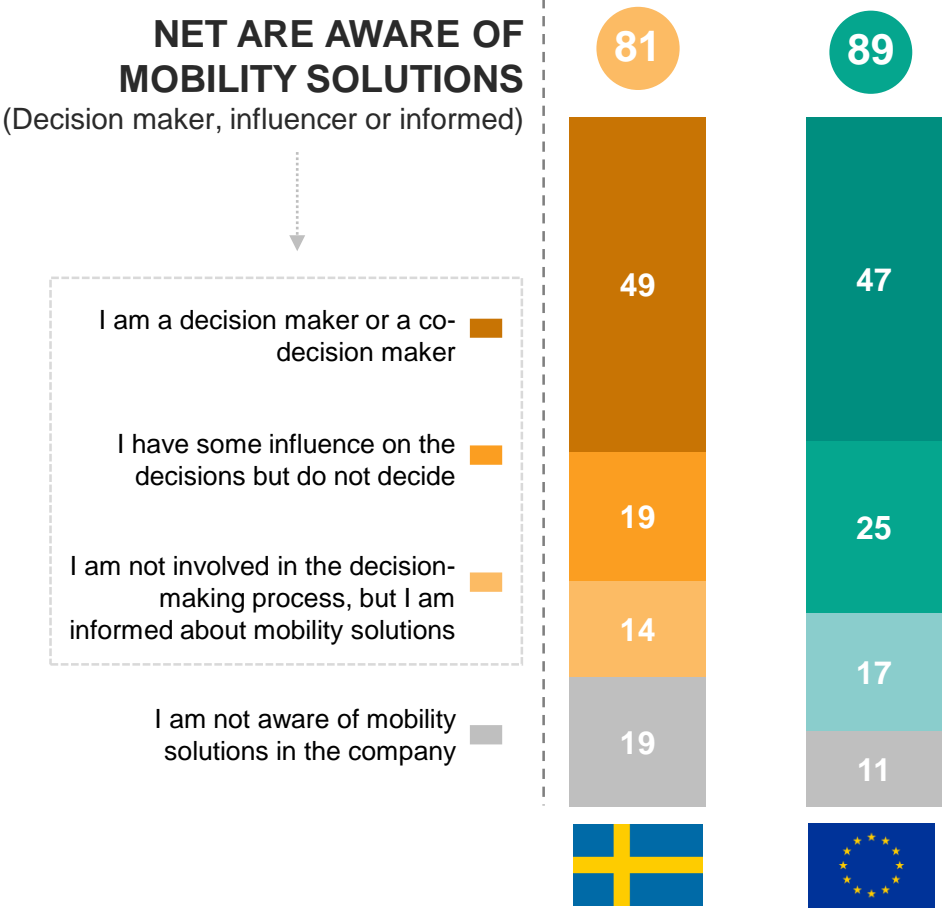
- Corporate car sharing, ride sharing, mobility budget and mobility app are the most chosen solutions by these small companies.

3

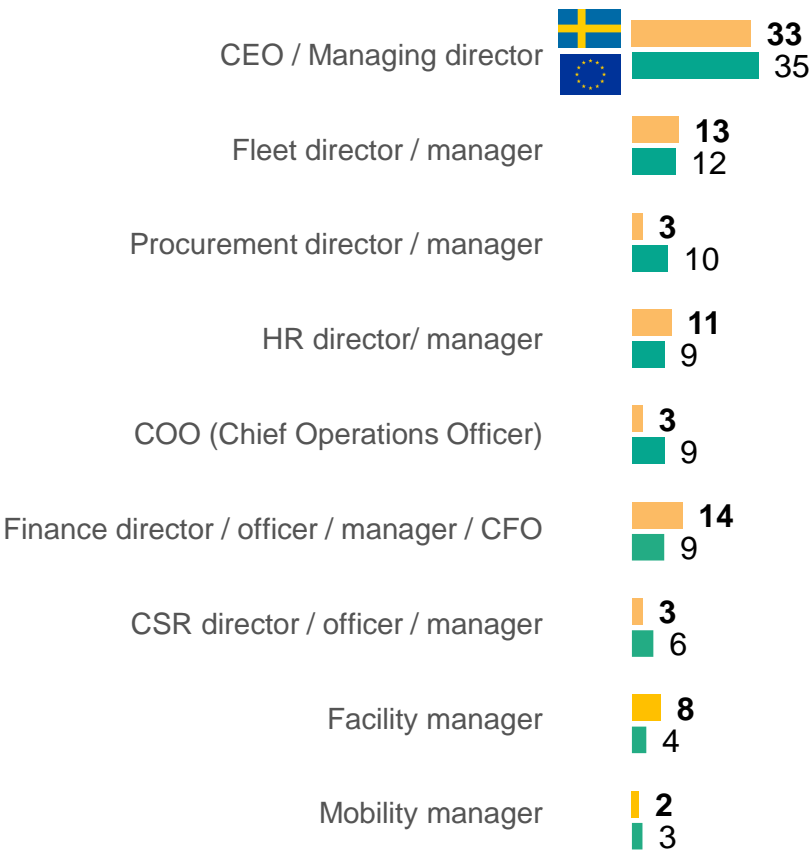
- Like last year, these solutions are still considered as an **add-on to the company vehicles** and are not dedicated to replace them.

MOBILITY SOLUTION DECISION MAKERS

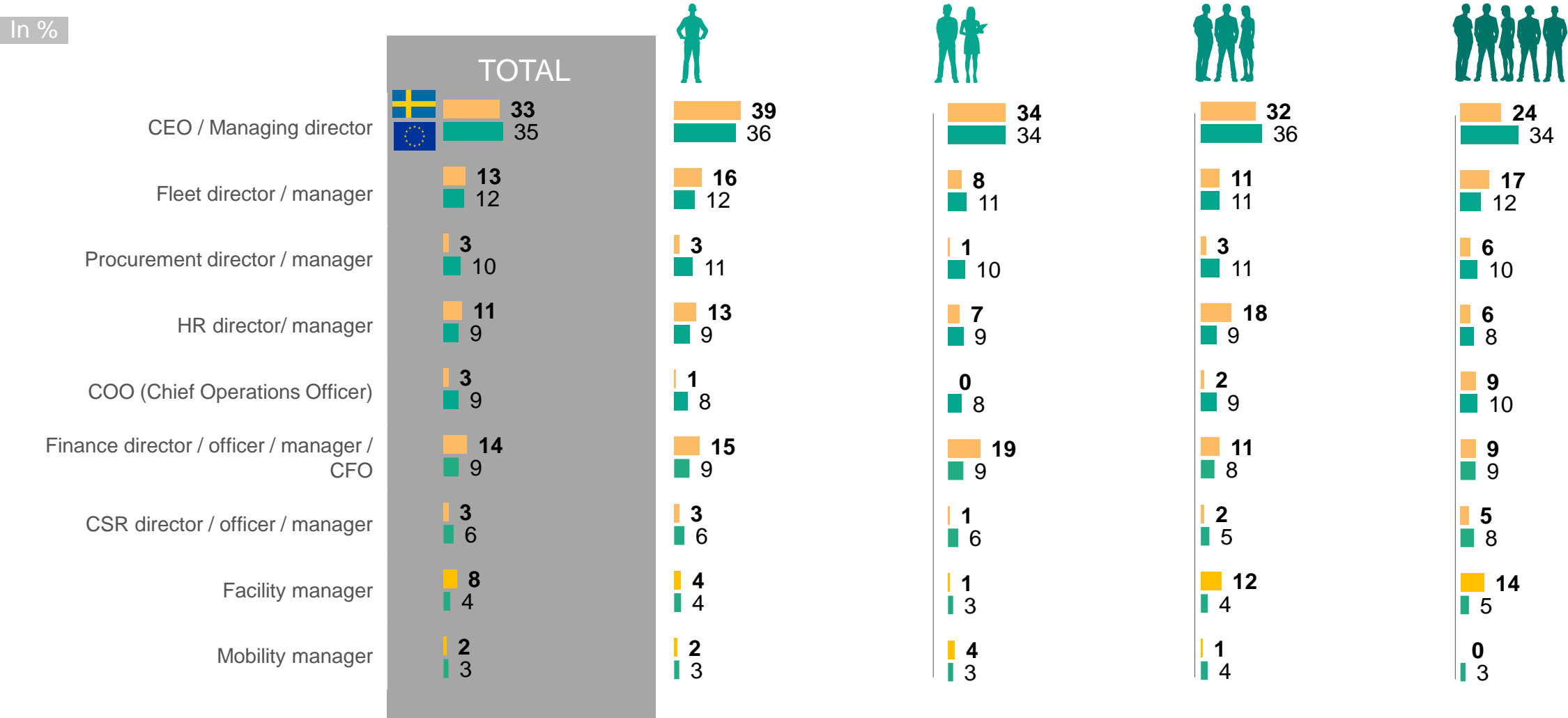
RESPONDENTS INVOLVEMENT IN MOBILITY SOLUTION DECISIONS



POSITION OF THE PERSON WHO DECIDES ON MOBILITY SOLUTIONS



POSITION OF THE PERSON WHO DECIDES ON MOBILITY SOLUTIONS



New question added in 2023

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



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



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



AN APP TO BOOK MOBILITY SOLUTIONS PROVIDED BY THE COMPANY



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



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



PUBLIC TRANSPORT



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



CAR OR CASH ALLOWANCE *New item

MOBILITY SOLUTIONS IMPLEMENTATION

At least one already implemented (including car or cash allowance)

In %

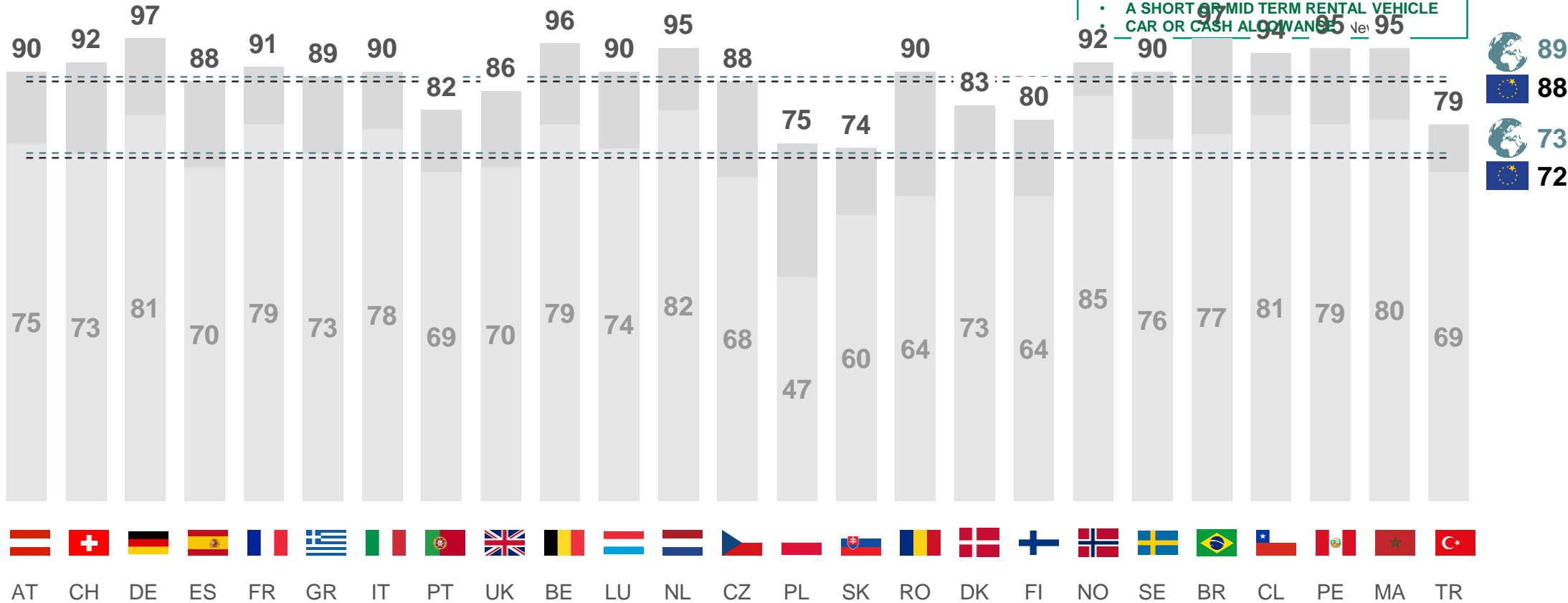


ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING

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



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

MOBILITY SOLUTIONS IMPLEMENTATION

At least one already implemented (including car or cash allowance)

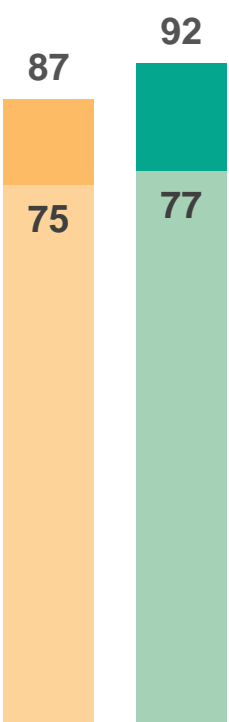
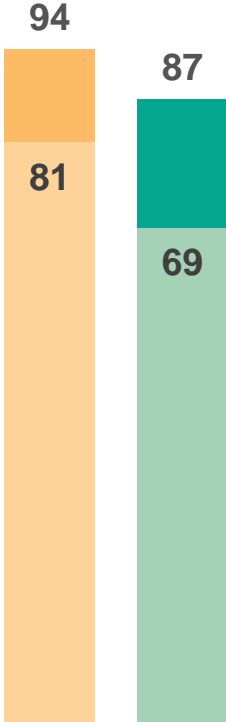
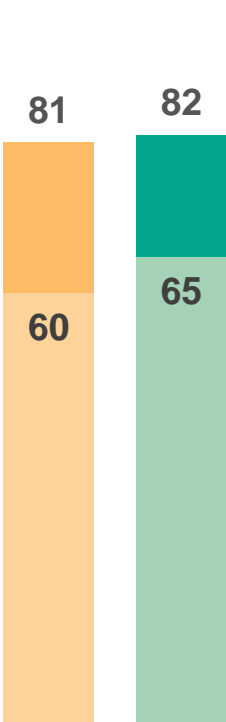
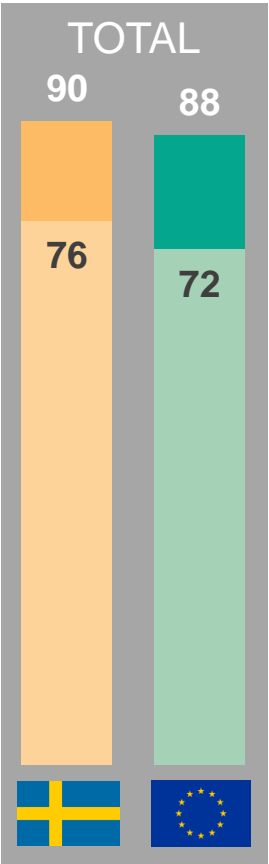
In %



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



OVERVIEW OF MOBILITY SOLUTIONS IMPLEMENTATION

In %

76%

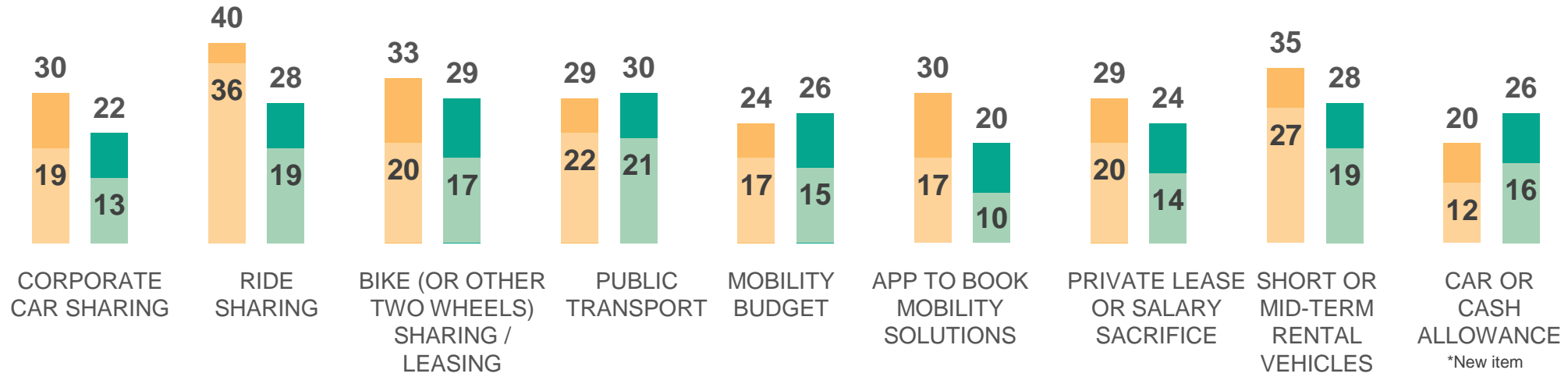
Of companies have already implemented at least one of these solutions



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING

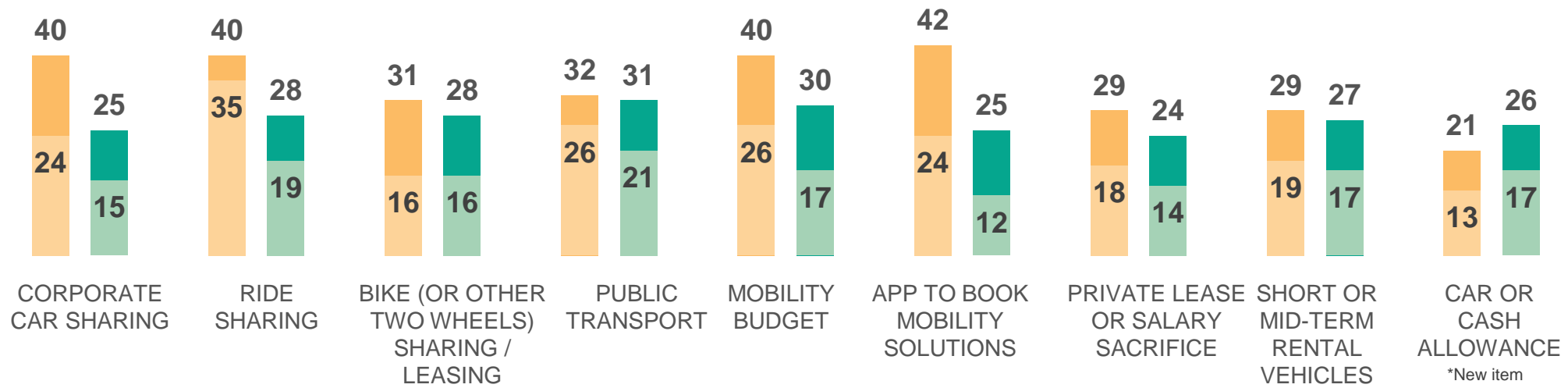
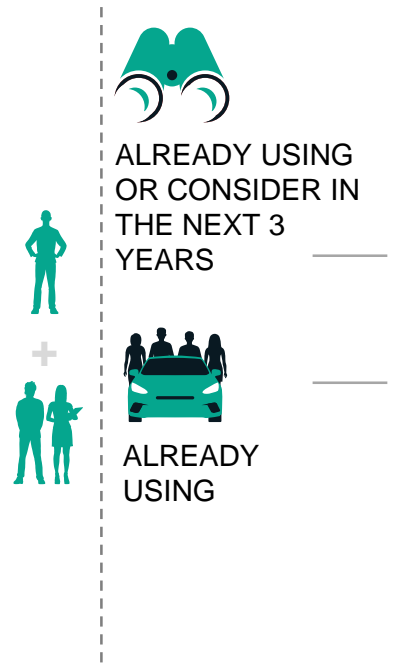


OVERVIEW OF MOBILITY SOLUTIONS IMPLEMENTATION

Focus on 1 to 99

74%

Of companies have already implemented at least one of these solutions



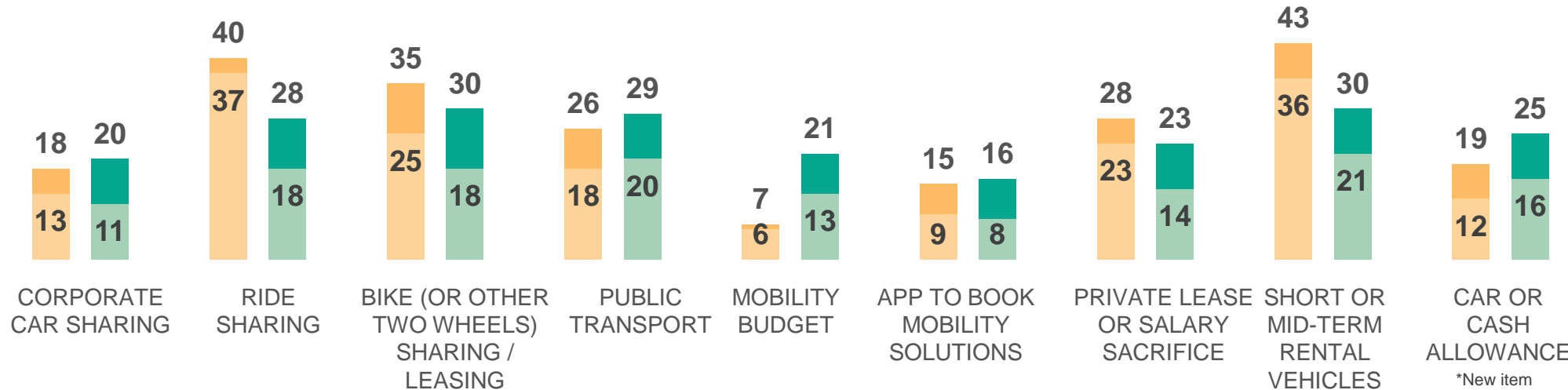
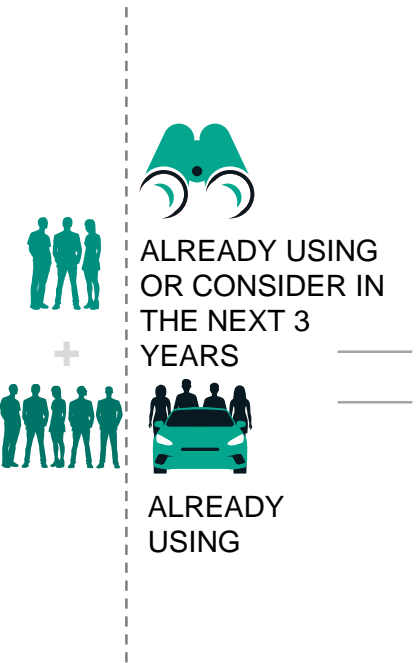
Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions

OVERVIEW OF MOBILITY SOLUTIONS IMPLEMENTATION

Focus on 100 and more

78%

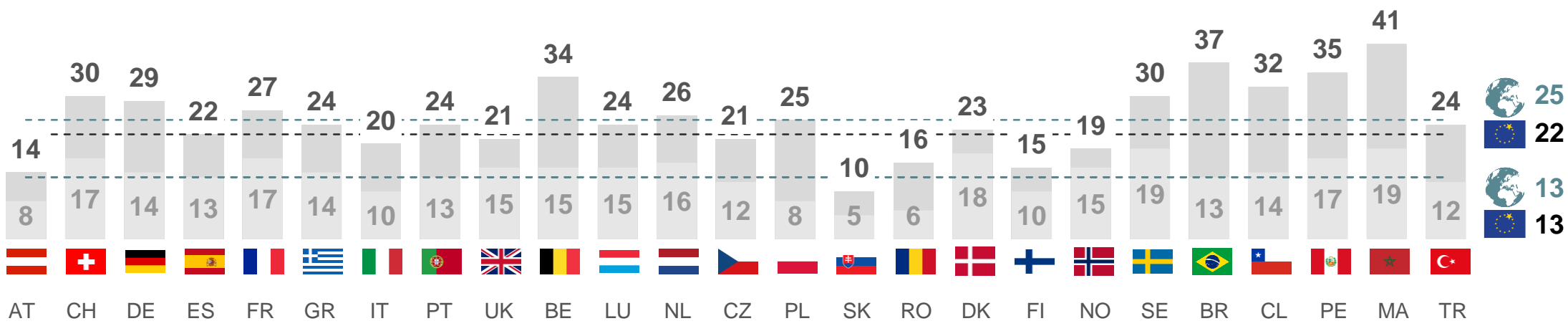
Of companies have already implemented at least one of these solutions



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

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

CORPORATE CAR SHARING IMPLEMENTATION

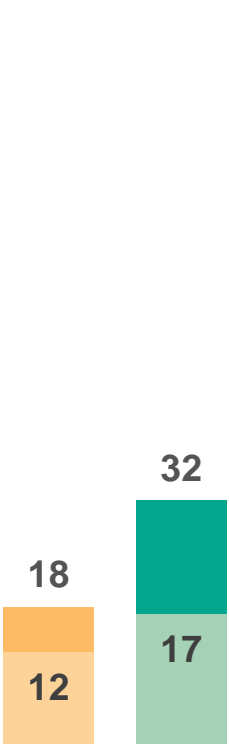
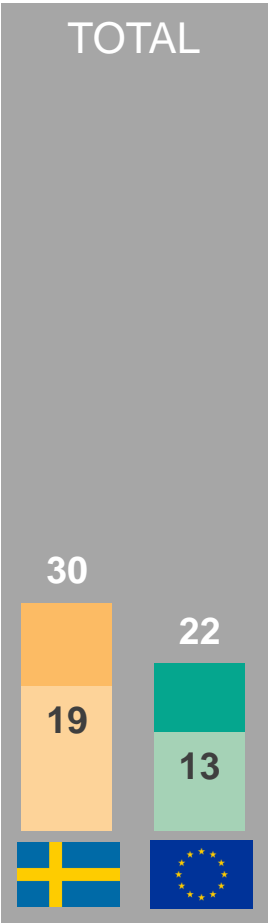
In %



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

RIDE SHARING IMPLEMENTATION

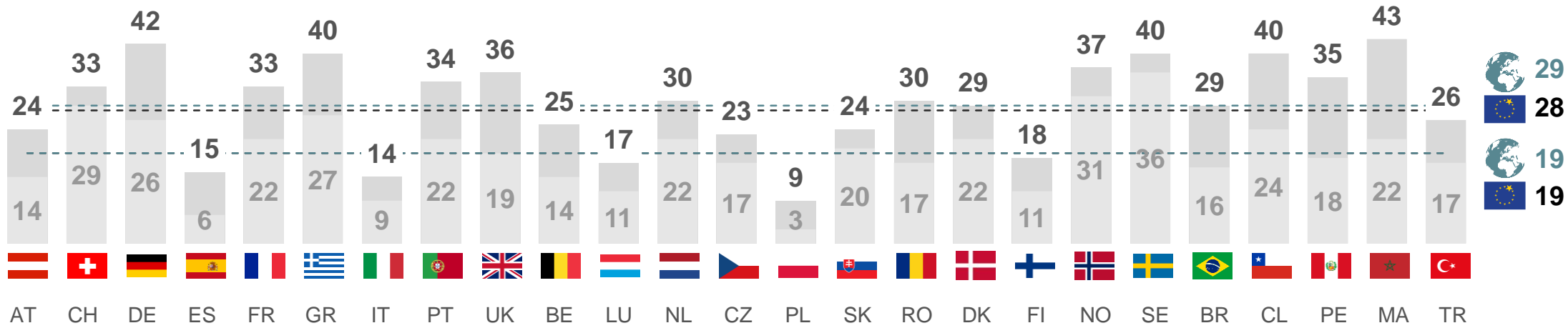
In %



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

RIDE SHARING IMPLEMENTATION

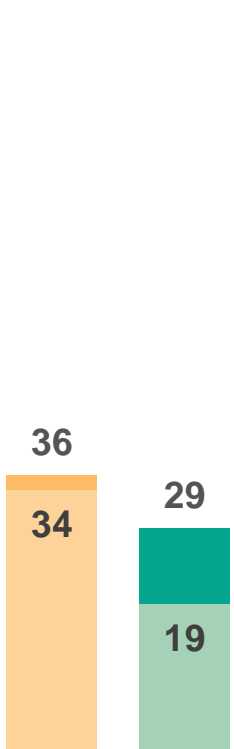
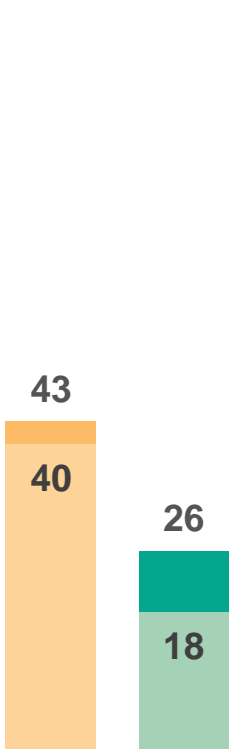
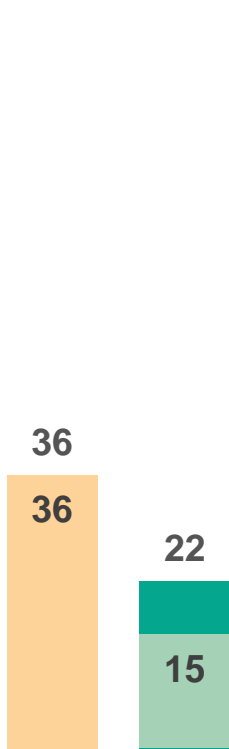
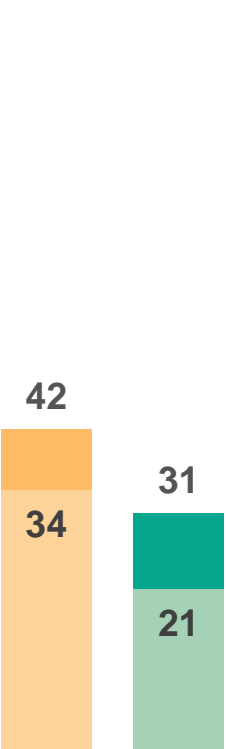
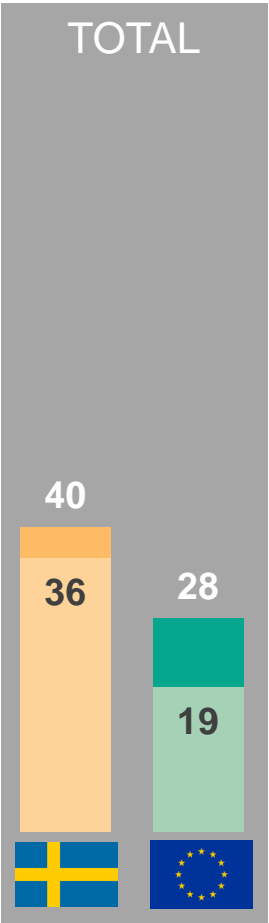
In %



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

BIKE (OR OTHER TWO WHEELS) SHARING / LEASING IMPLEMENTATION

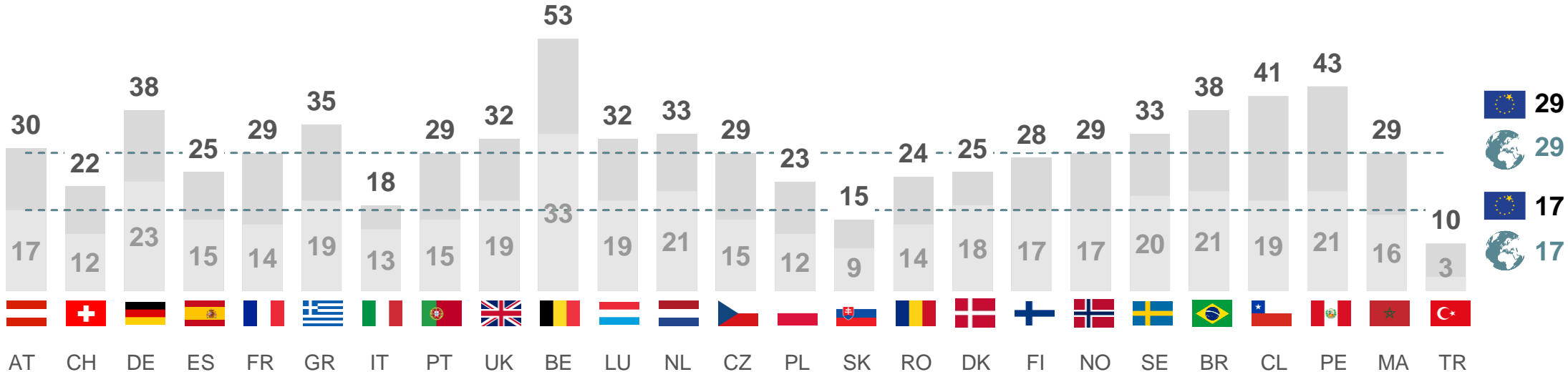
In %



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



EU 29
Globe 29
EU 17
Globe 17

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

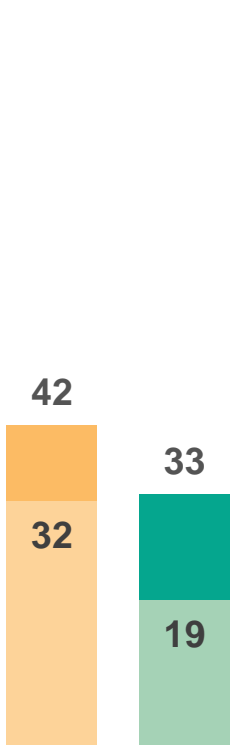
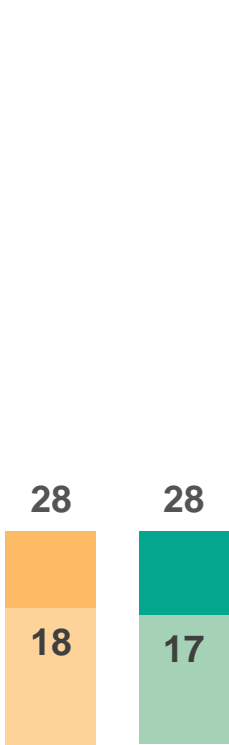
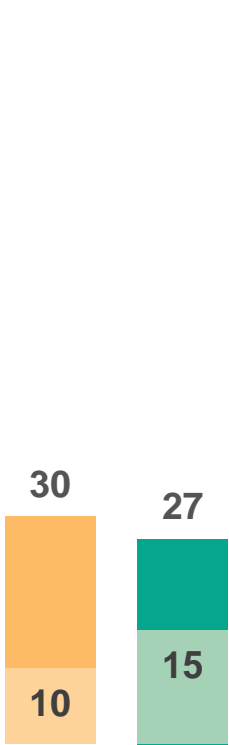
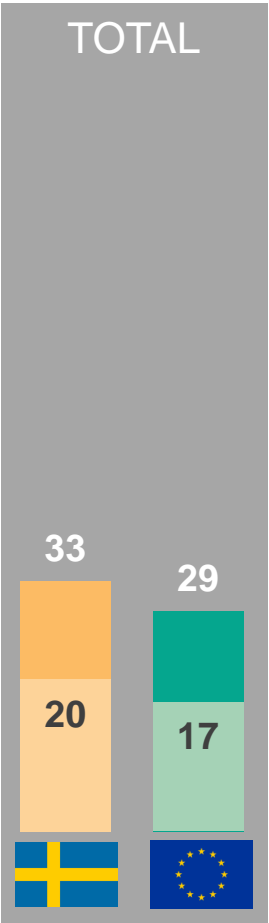
In %



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

PUBLIC TRANSPORT IMPLEMENTATION

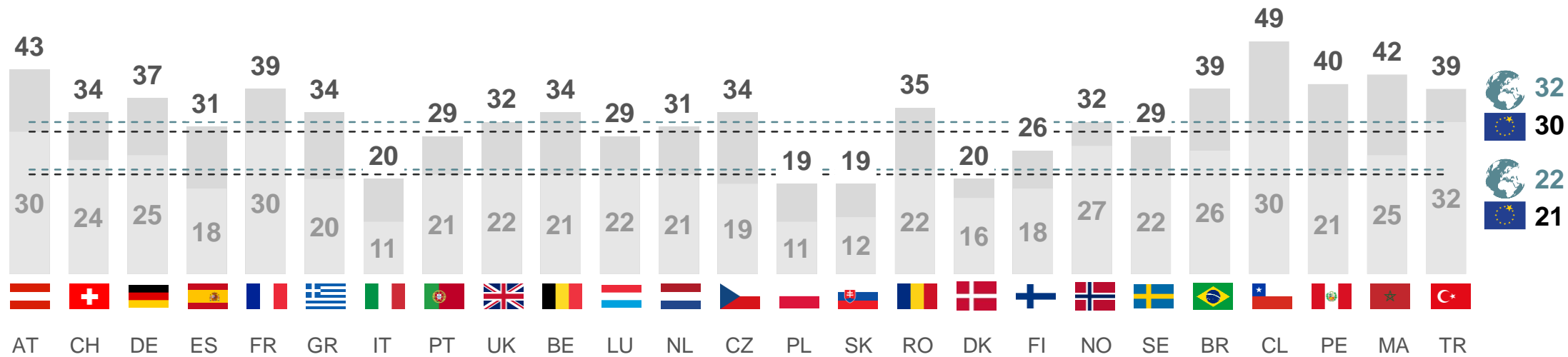
In %



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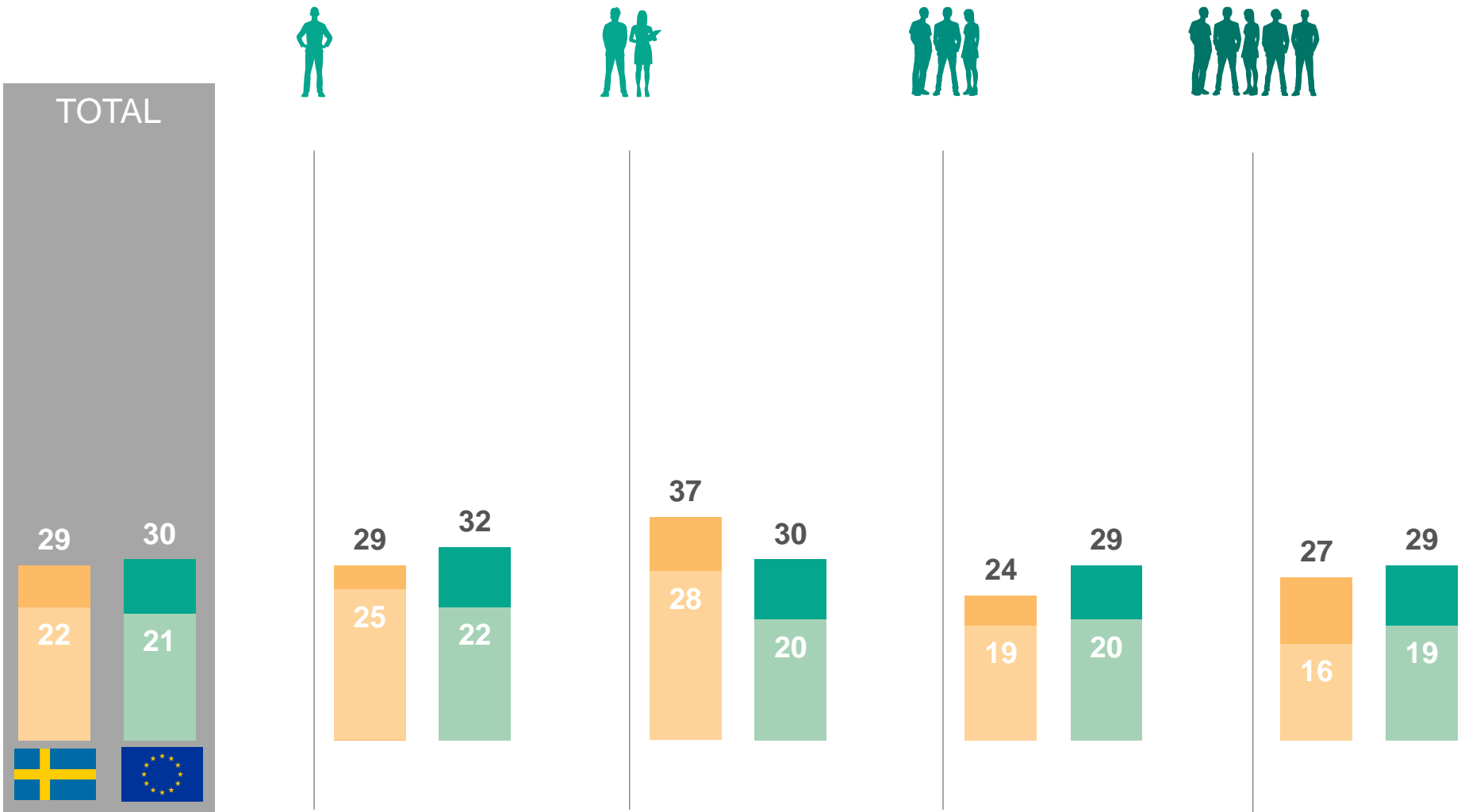
In %



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MOBILITY BUDGET IMPLEMENTATION

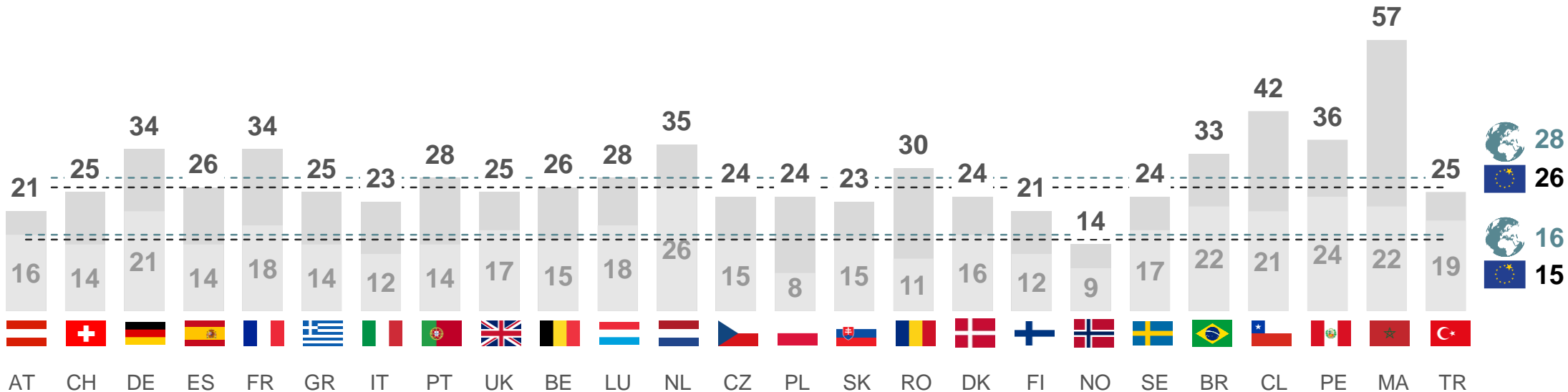
In %



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MOBILITY BUDGET IMPLEMENTATION

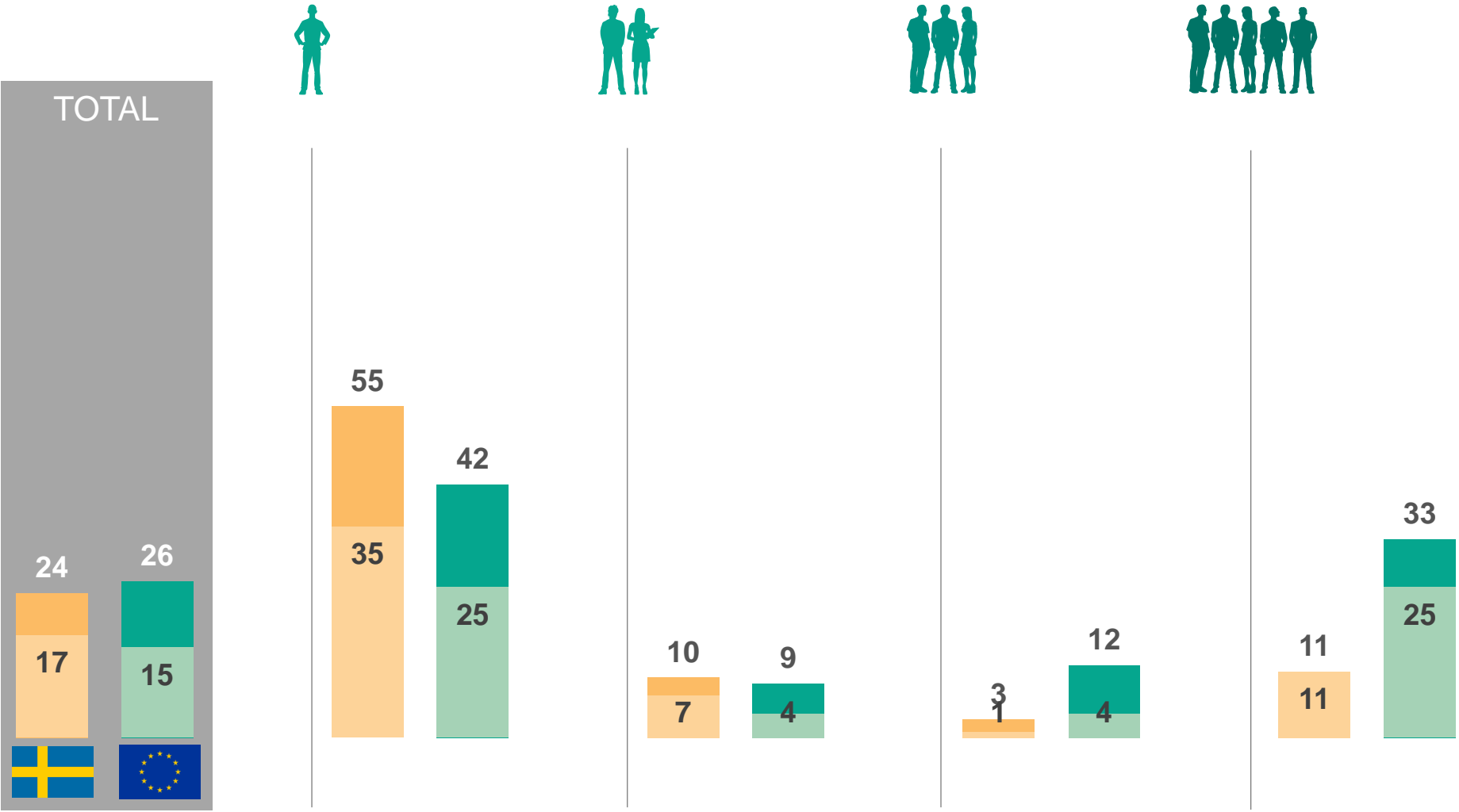
In %



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AN APP TO BOOK MOBILITY SOLUTIONS IMPLEMENTATION

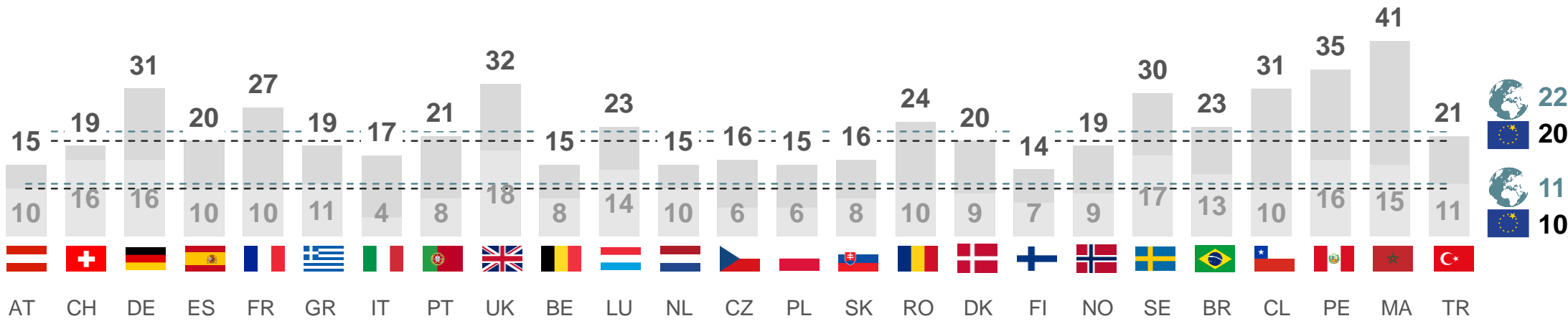
In %



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



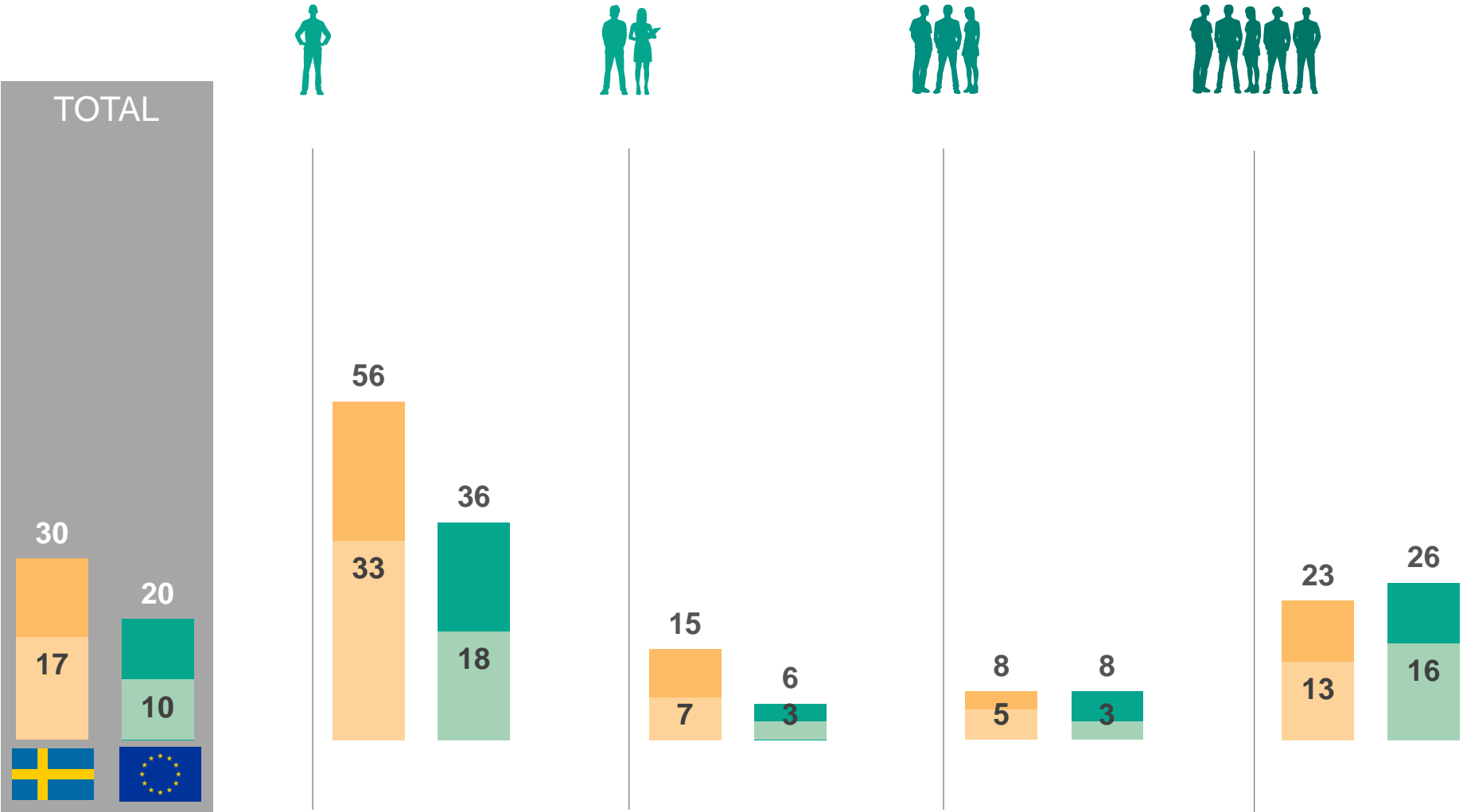
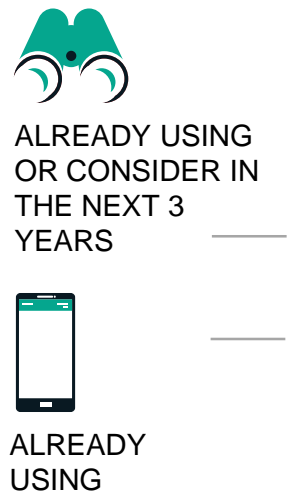
ALREADY
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AN APP TO BOOK MOBILITY SOLUTIONS IMPLEMENTATION

In %



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PRIVATE LEASE OR SALARY SACRIFICE IMPLEMENTATION

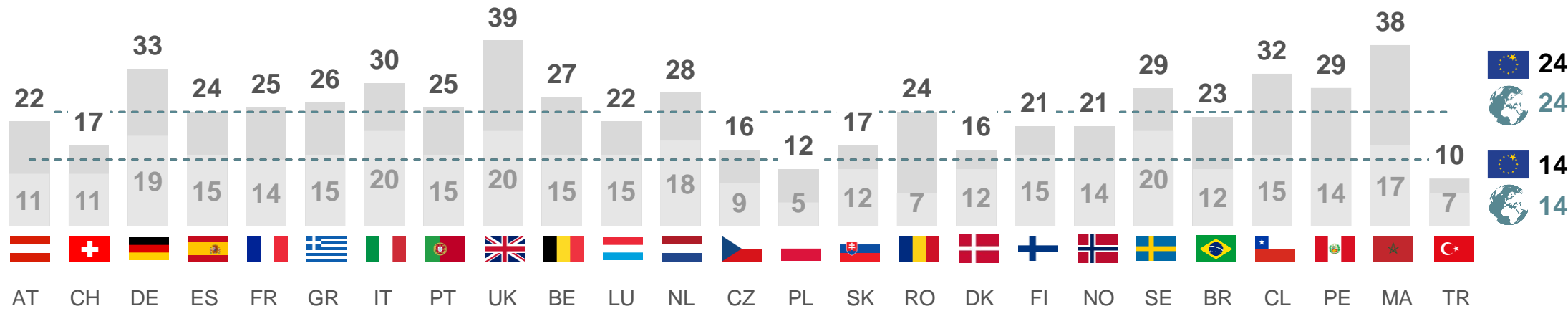
In %



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



24



24

14



14

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

PRIVATE LEASE OR SALARY SACRIFICE IMPLEMENTATION

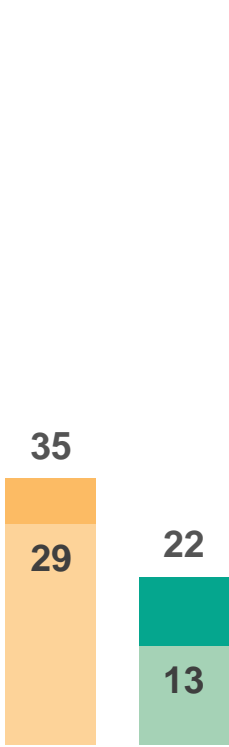
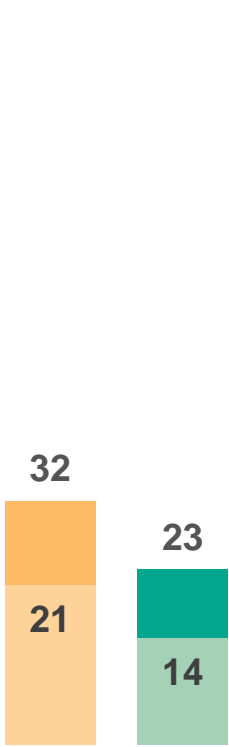
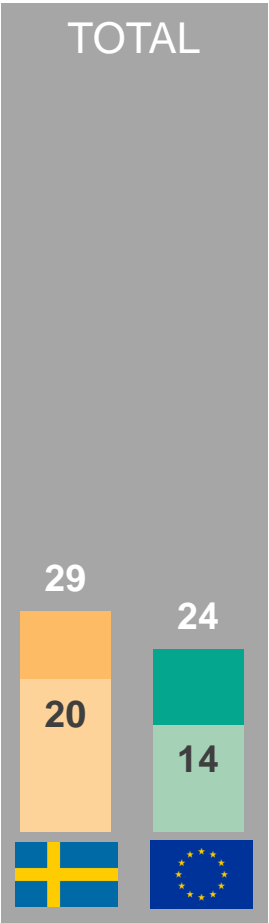
In %



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



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Question asked to respondents that are aware of mobility solutions

SHORT OR MID-TERM RENTAL VEHICLES IMPLEMENTATION

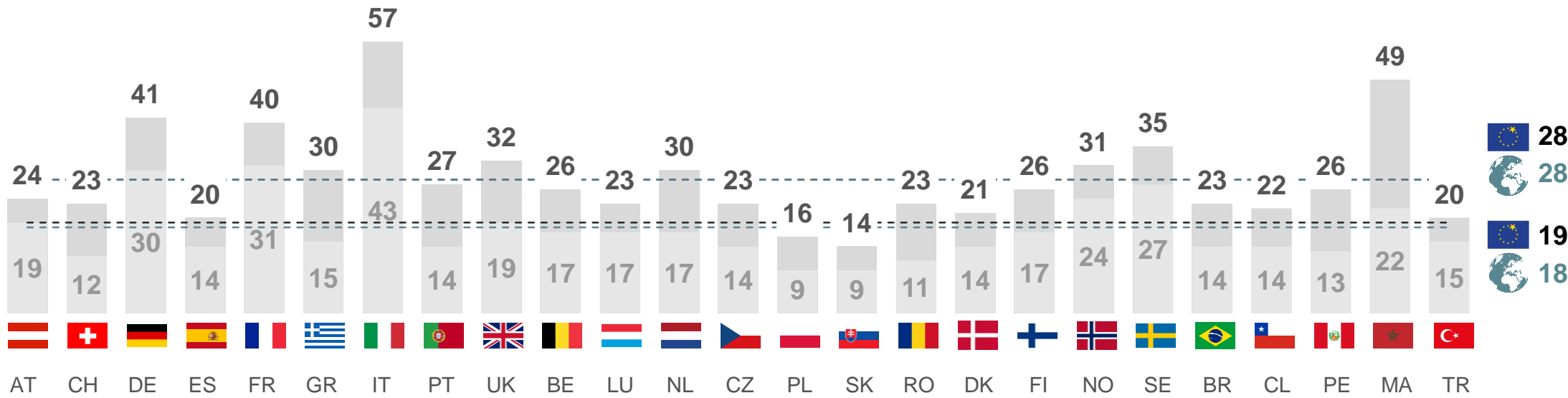
In %



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



ALREADY
USING



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Question asked to respondents that are aware of mobility solutions

SHORT OR MID-TERM RENTAL VEHICLES IMPLEMENTATION

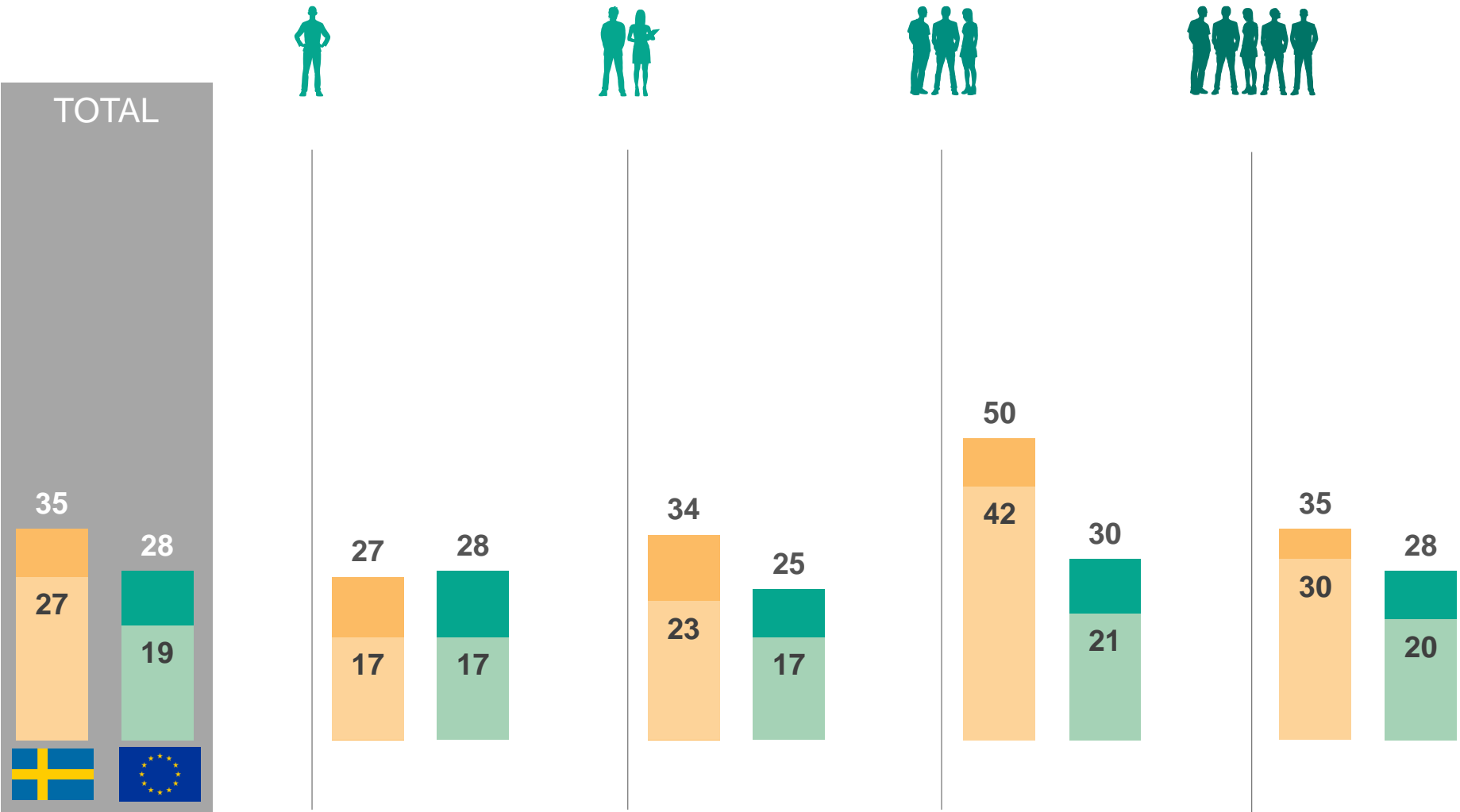
In %



ALREADY USING
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YEARS



ALREADY
USING



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Question asked to respondents that are aware of mobility solutions

CAR OR CASH ALLOWANCE IMPLEMENTATION

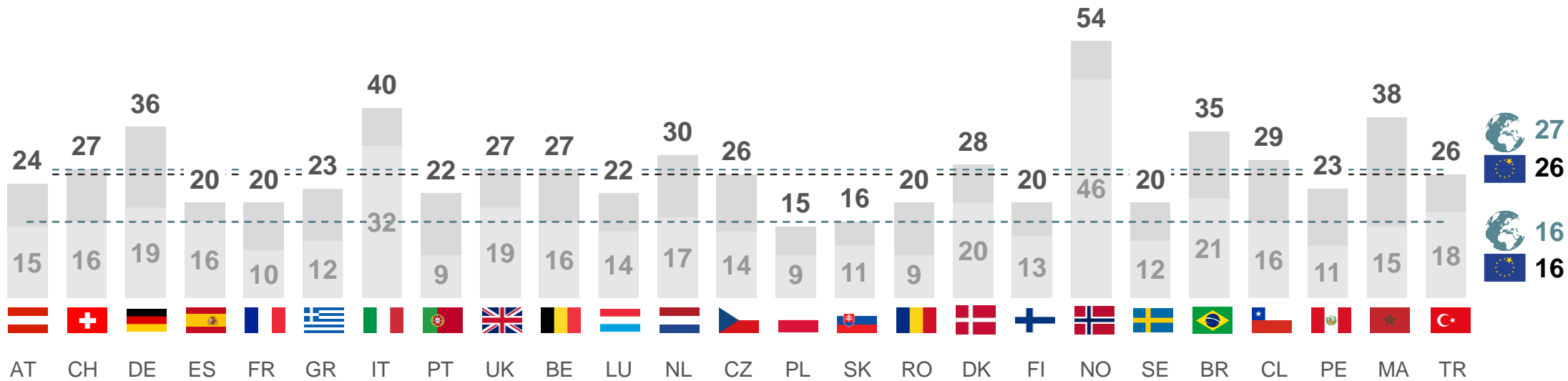
In %



ALREADY USING
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YEARS



ALREADY
USING



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CAR OR CASH ALLOWANCE IMPLEMENTATION

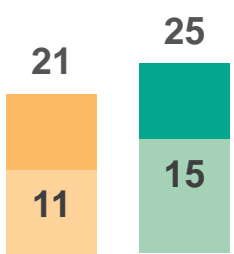
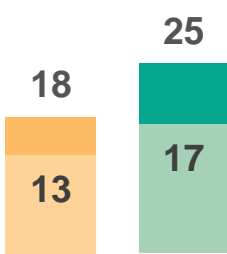
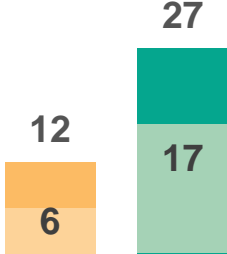
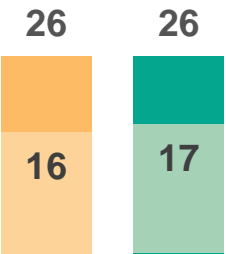
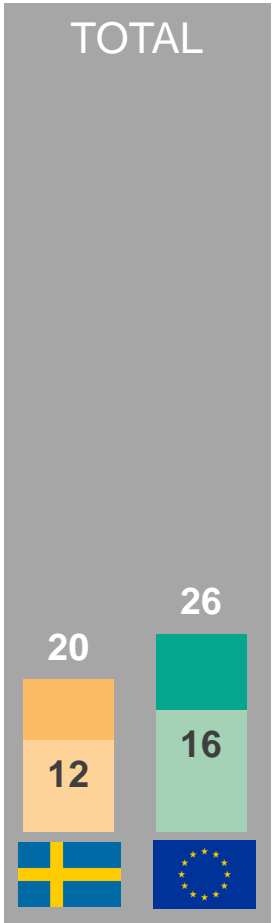
In %



ALREADY USING
OR CONSIDER IN
THE NEXT 3
YEARS



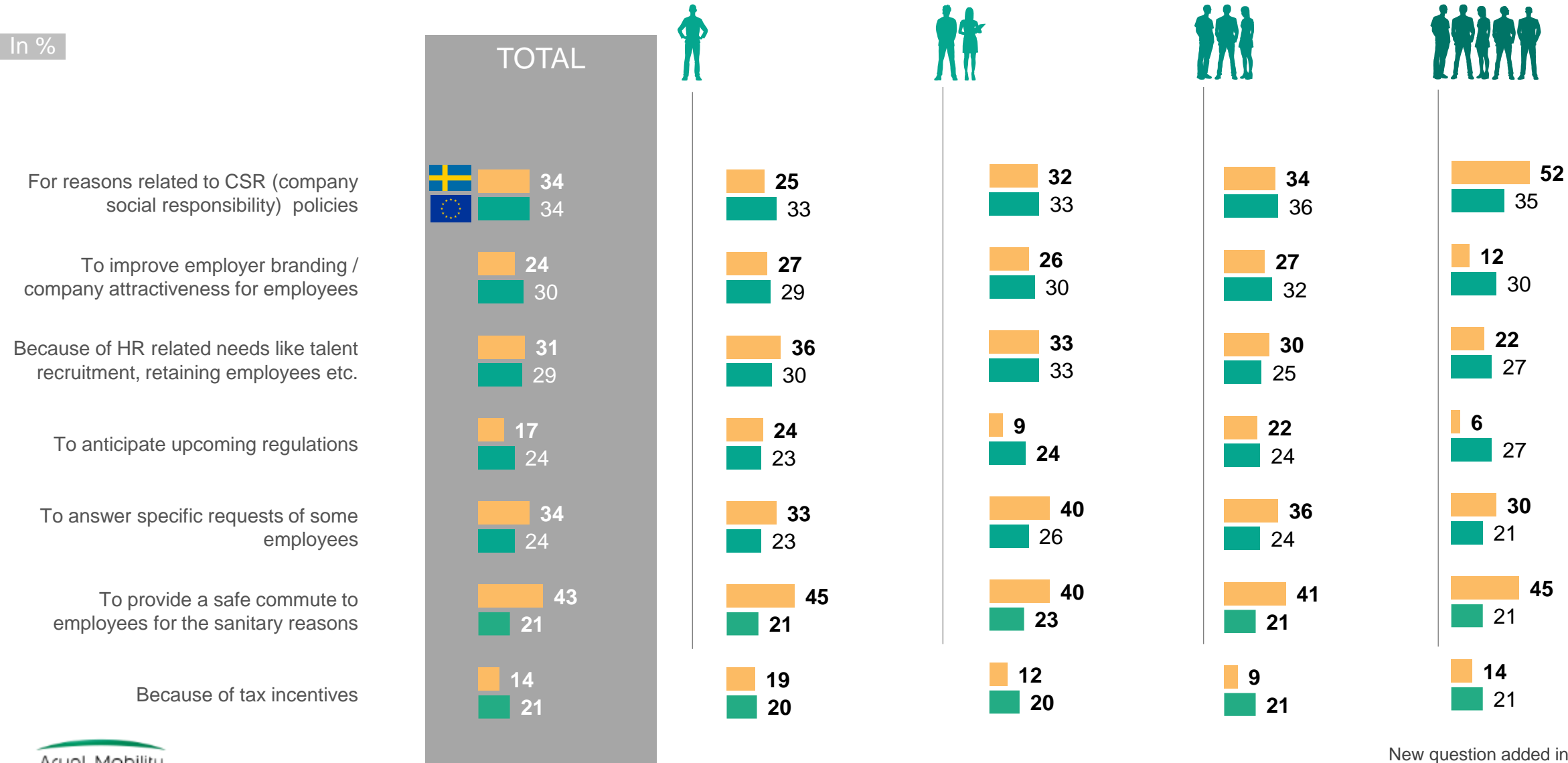
ALREADY
USING



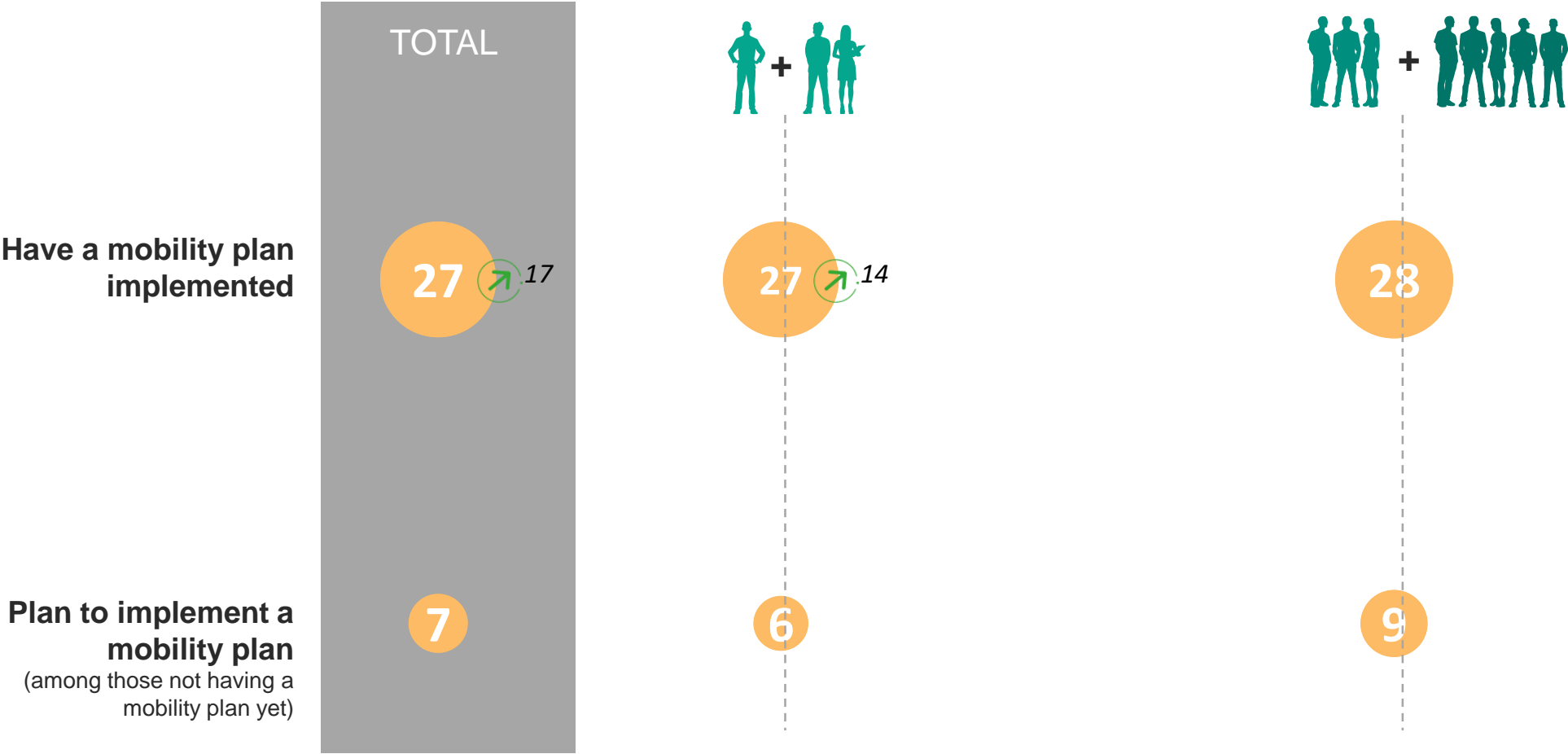
Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions

REASONS FOR IMPLEMENTING OR CONSIDERING MOBILITY SOLUTIONS

In %



MOBILITY PLAN IMPLEMENTATION



INTENTION TO HAVE A MOBILITY PLAN IN THE NEXT 3 YEARS

In %

% of companies planning to have a
mobility plan in the next 3 years
(amongst companies considering mobility as a
strategic factor)

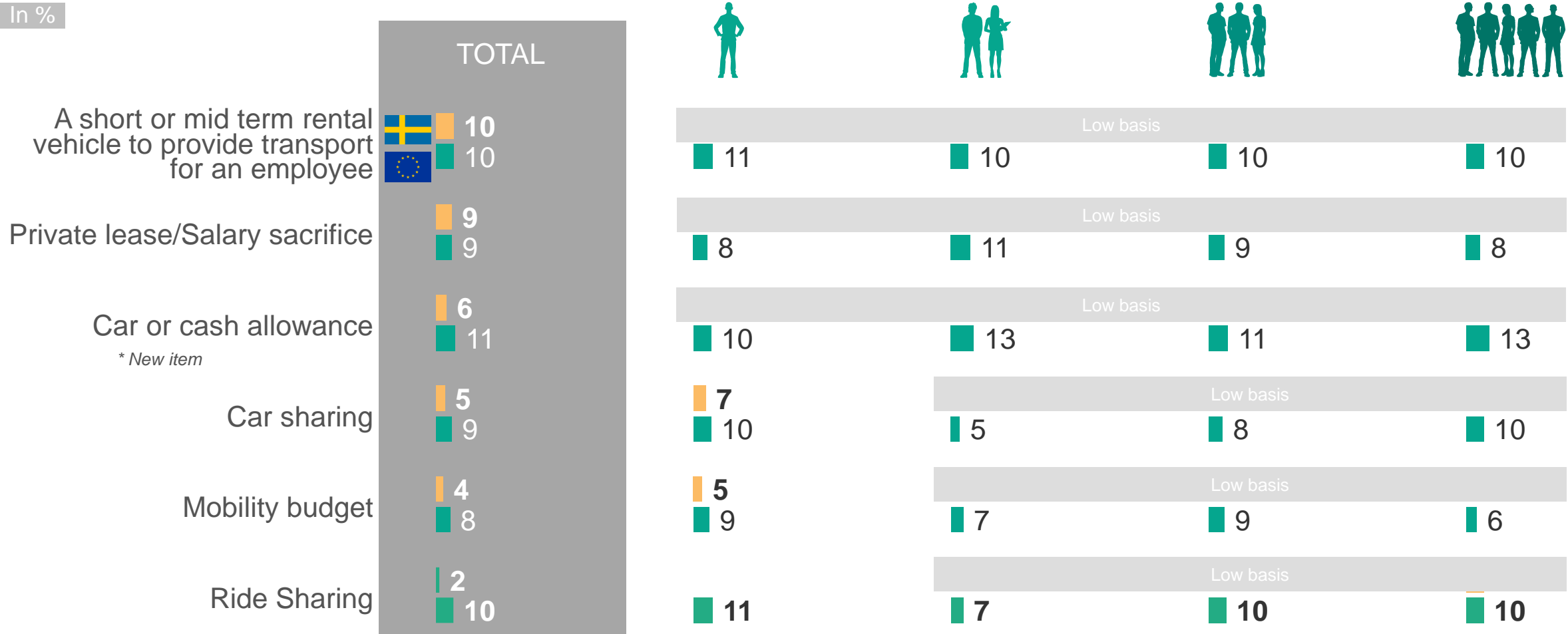
7

Is it in your plans to have a mobility plan in the next 3 years?
Basis: Mobility as a strategic factor and don't have Mobility plan

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

Certainly

In %

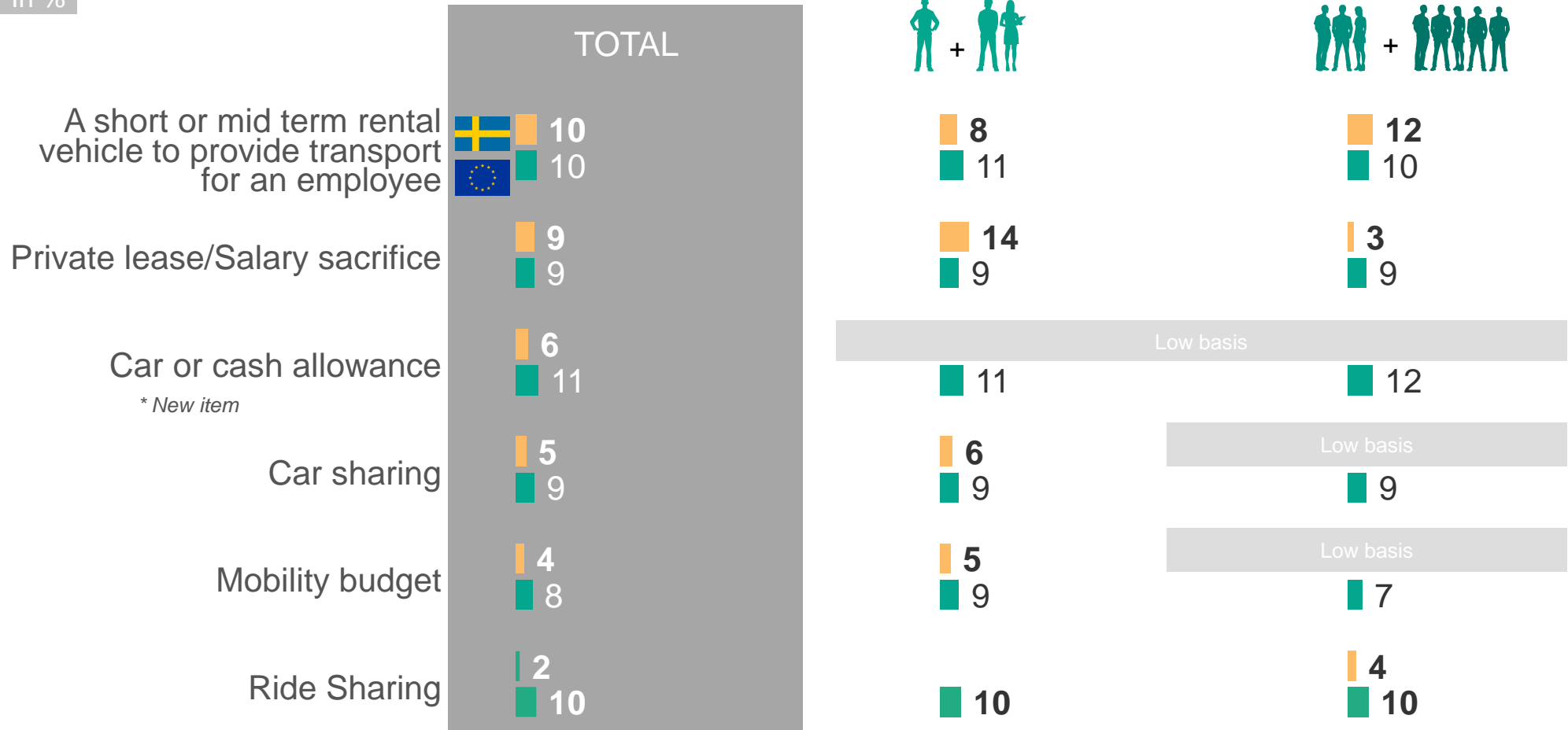


Would you anticipate that your company would give up all or part of the company car fleet for such alternatives?
Basis: companies using or considering at least one mobility solution
Question asked to respondents that are aware of mobility solutions

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

Certainly

In %

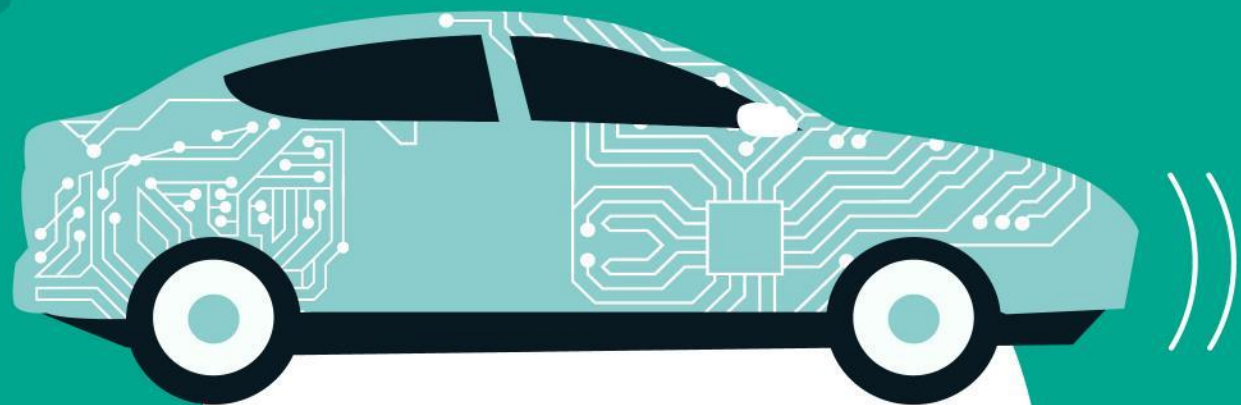


Would you anticipate that your company would give up all or part of the company car fleet for such alternatives?

Basis: companies using or considering at least one mobility solution

Question asked to respondents that are aware of mobility solutions

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



STABLE USE OF TELEMATICS BY SWEDISH COMPANIES

1

- Like last year, **42% of Swedish companies have adopted telematics**. Sweden is in line with the European average, even though it is increasing significantly this year.

2

- Telematics are still a little more adopted for LCVs (37%) than for passenger cars (25%).

To be noticed this year, the main reason to adopt telematics is to avoid **not allowed usage** for most companies, for passenger cars as well as for LCVs.

CONNECTED VEHICLES



USE OF TELEMATICS



42%



44%

↑ 33

#1

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

#2

To improve drivers safety / behaviours

#3

To locate vehicles or improve vehicle security



TOP 3 REASONS



51%

↑ 25



24%

↑ 19

34%

30%

30%

37%

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

All vehicles

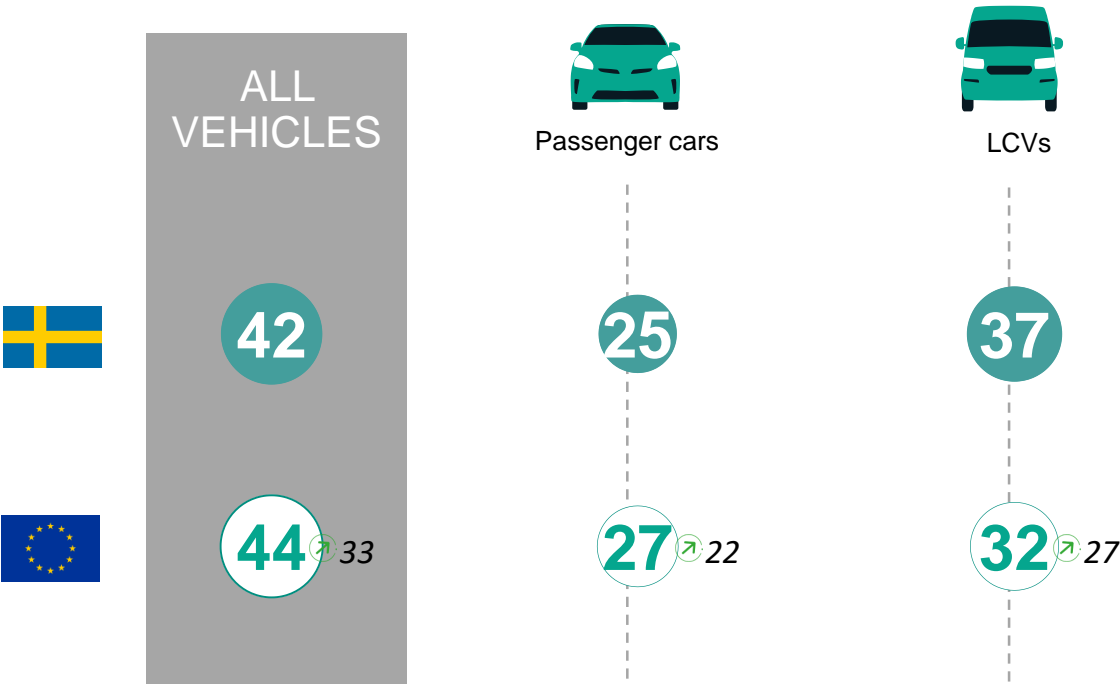
In %



Passenger cars + LCVs

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

HOW TO READ THE RESULTS ?
42% of companies with fleet using connected vehicles for all or part of their fleet.
25% use connected vehicles for passenger cars, while 37% use connected vehicles for 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

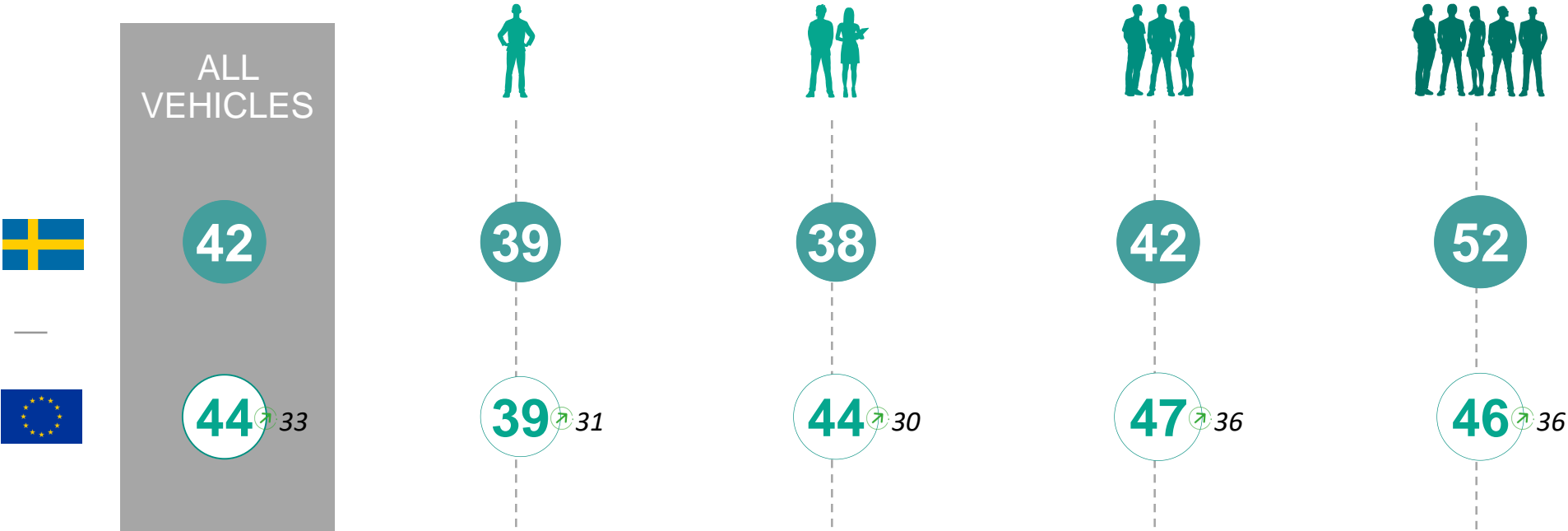
All vehicles

In %



Passenger cars + LCVs

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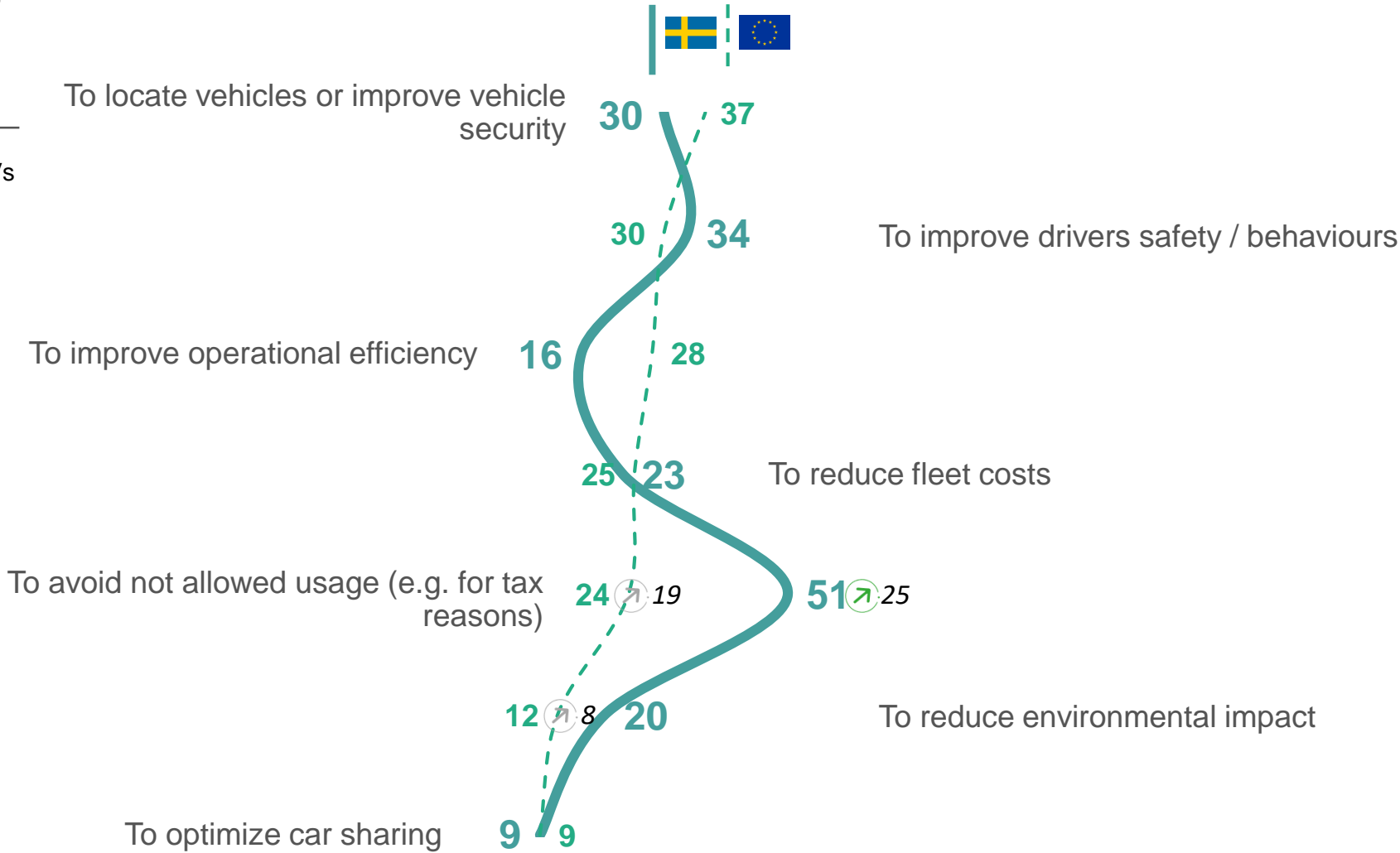
REASONS FOR USING CONNECTED VEHICLES

All vehicles

In %



Passenger cars + LCVs



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

REASONS FOR USING CONNECTED VEHICLES

All vehicles - Focus on 1 to 99

In %



Passenger cars + LCVs



To locate vehicles or improve vehicle security

37 39

To improve drivers safety / behaviours

27 29

To improve operational efficiency

12 26

To reduce fleet costs

25 26

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

23 17

45

To reduce environmental impact

12 9 28

To optimize car sharing

5 9

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

REASONS FOR USING CONNECTED VEHICLES

All vehicles - Focus on 100 and more

In %



Passenger cars + LCVs



To locate vehicles or improve vehicle security

21 37

To improve drivers safety / behaviours

32 40

To improve operational efficiency

20 30

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

25 21 57 22

To reduce fleet costs

20 24

To reduce environmental impact

11 8 13

To optimize car sharing

9 12

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

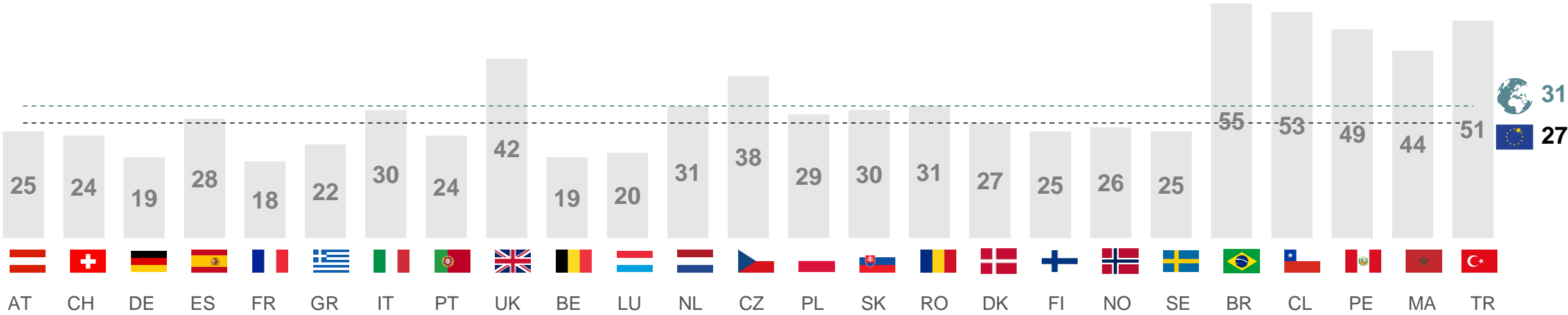
Passenger cars

In %



Passenger cars

PROPORTION OF COMPANIES USING
CONNECTED VEHICLES FOR THEIR PASSENGER
CARS



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Basis: companies with corporate passenger cars

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

Passenger cars

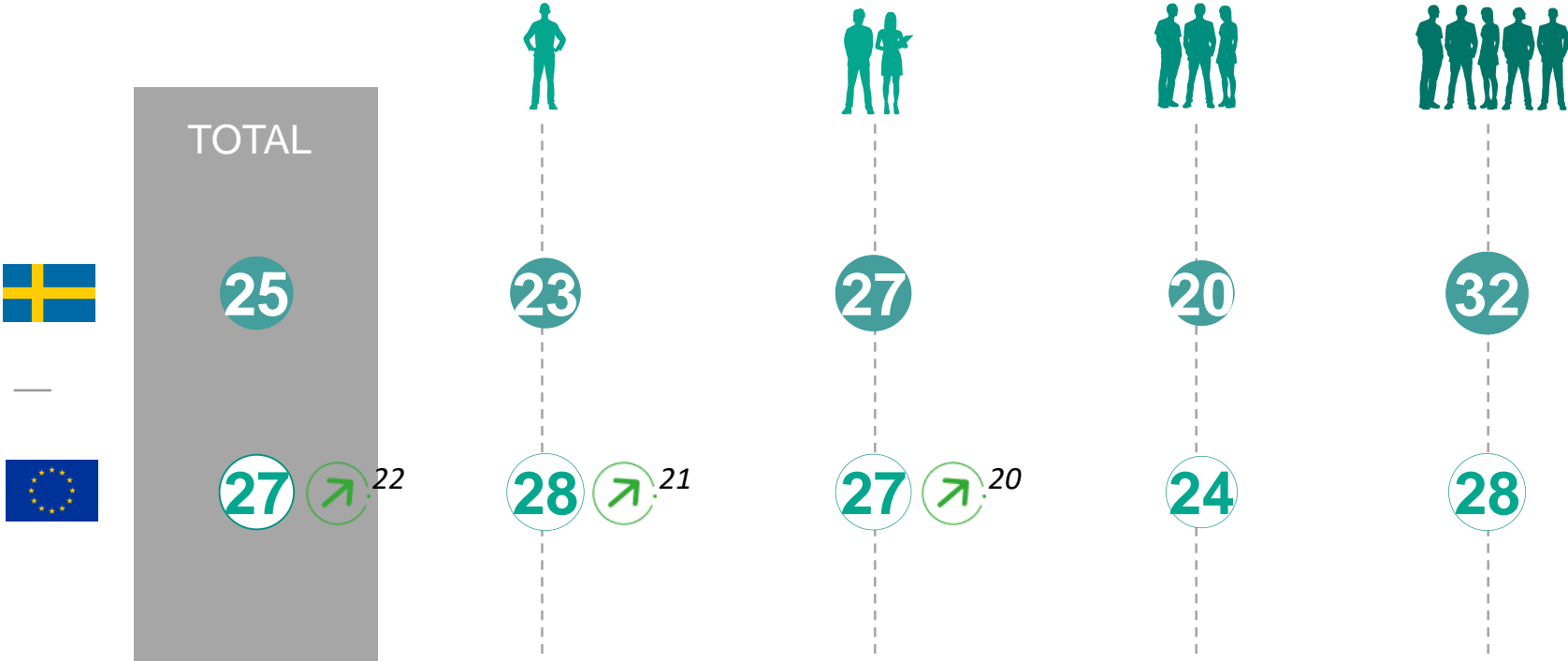
In %



Passenger cars

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

HOW TO READ THE RESULTS ?
25% use connected vehicles for passenger cars.



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

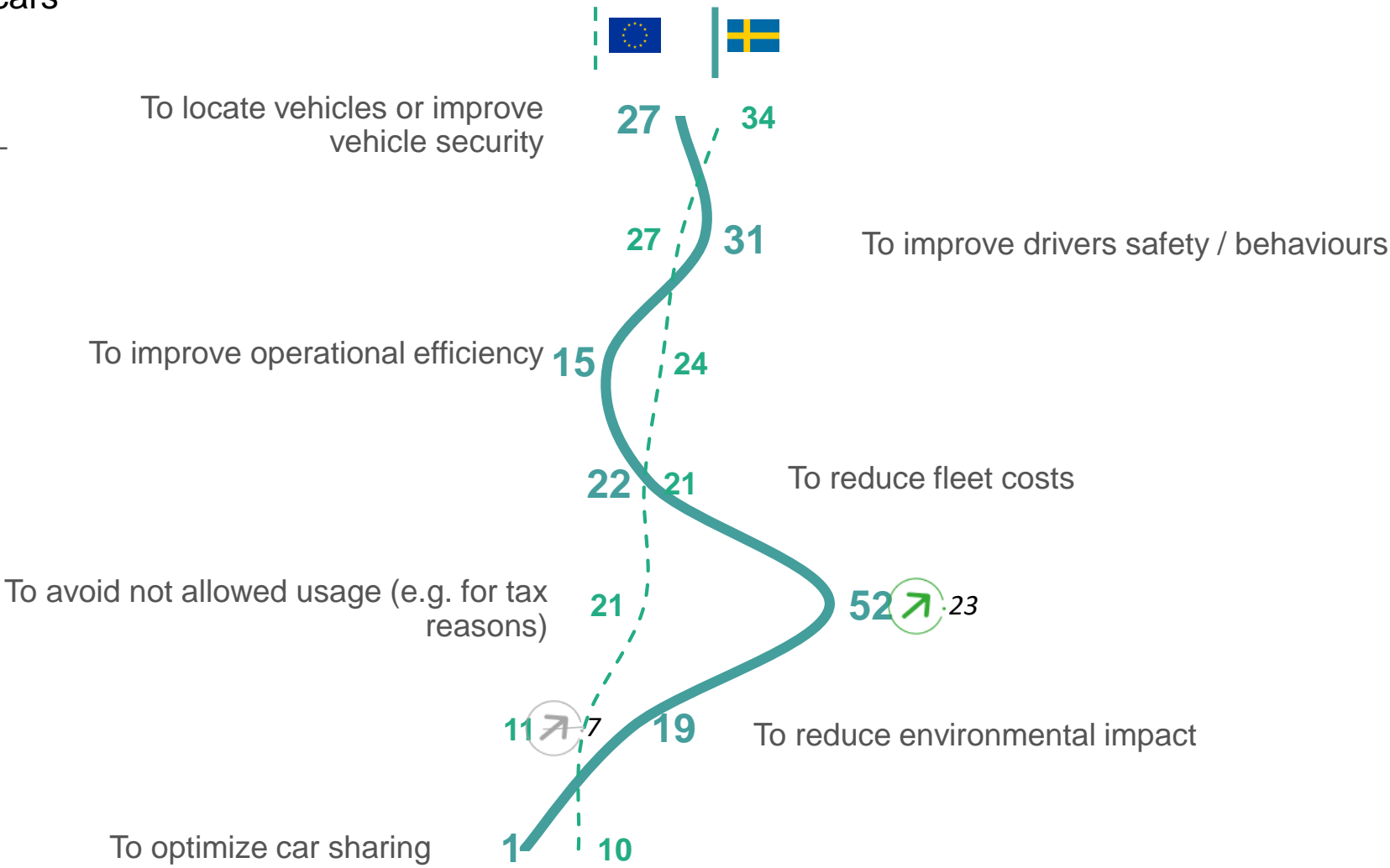
REASONS FOR USING CONNECTED VEHICLES

Passenger cars

In %



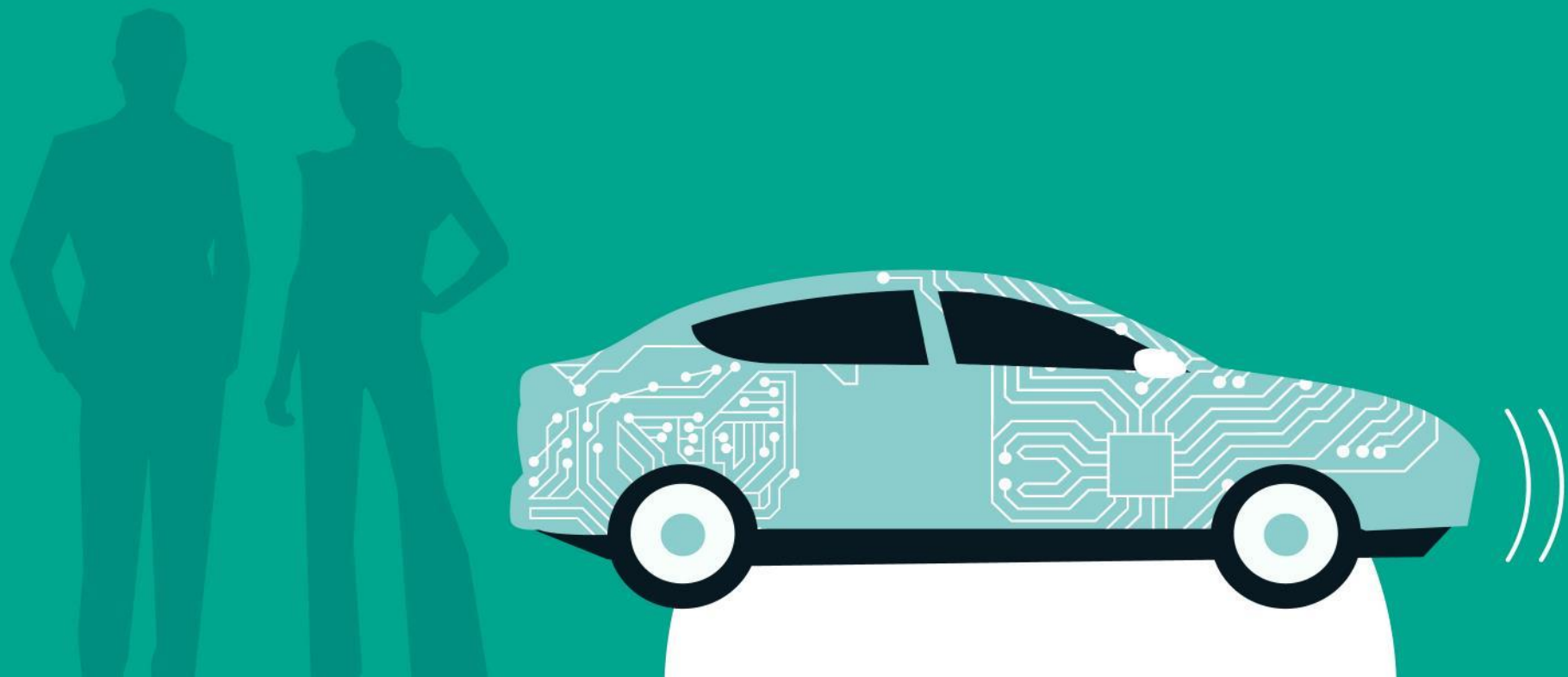
Passenger cars



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

CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY

B. LCVs



PROPORTION OF COMPANIES USING CONNECTED VEHICLES

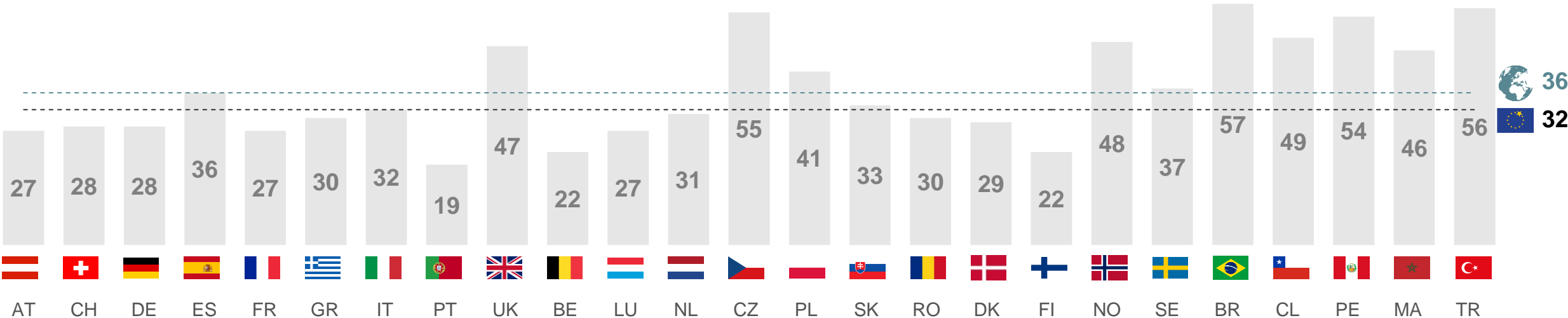
LCVs

In %



LCVs

PROPORTION OF COMPANIES USING
CONNECTED VEHICLES FOR THEIR LCVs



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

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

LCVs

In %

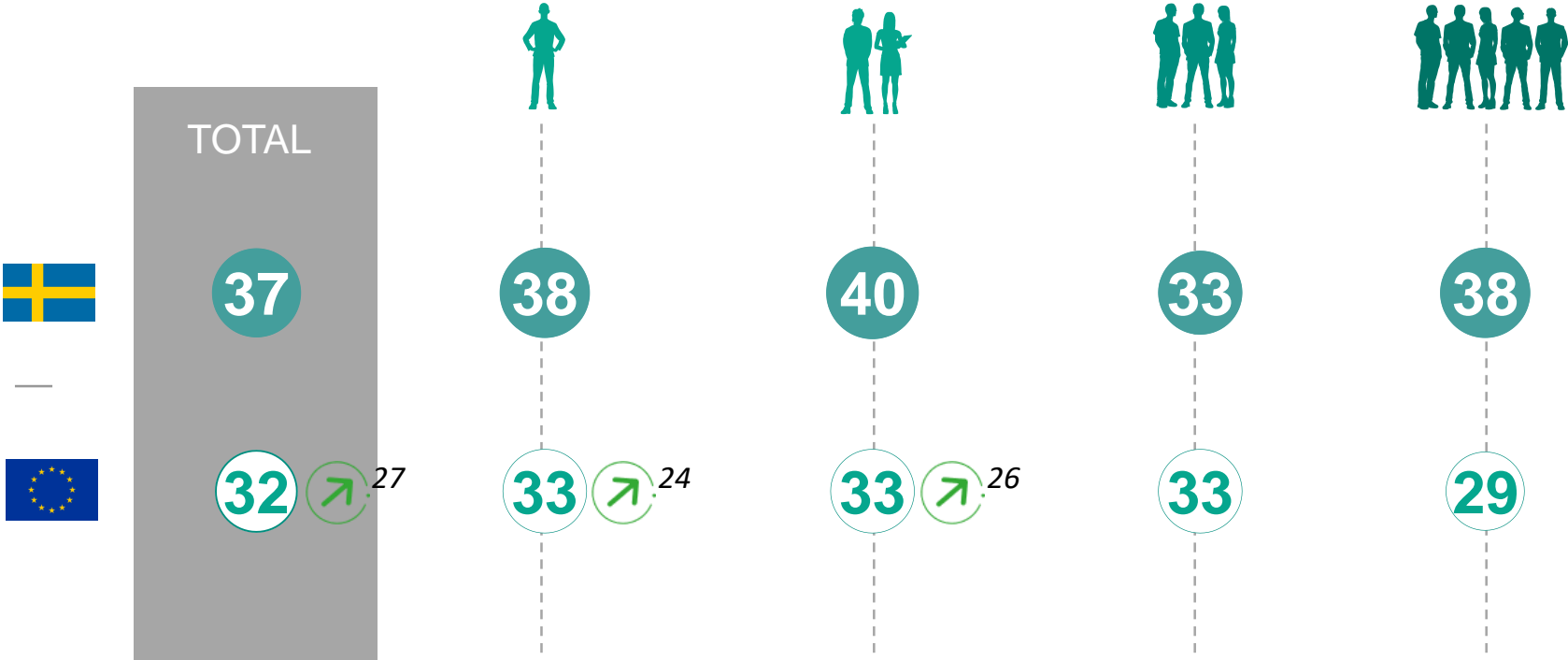


LCVs

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

HOW TO READ THE RESULTS ?

37% use connected vehicles for 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 at least one LCV car in fleet

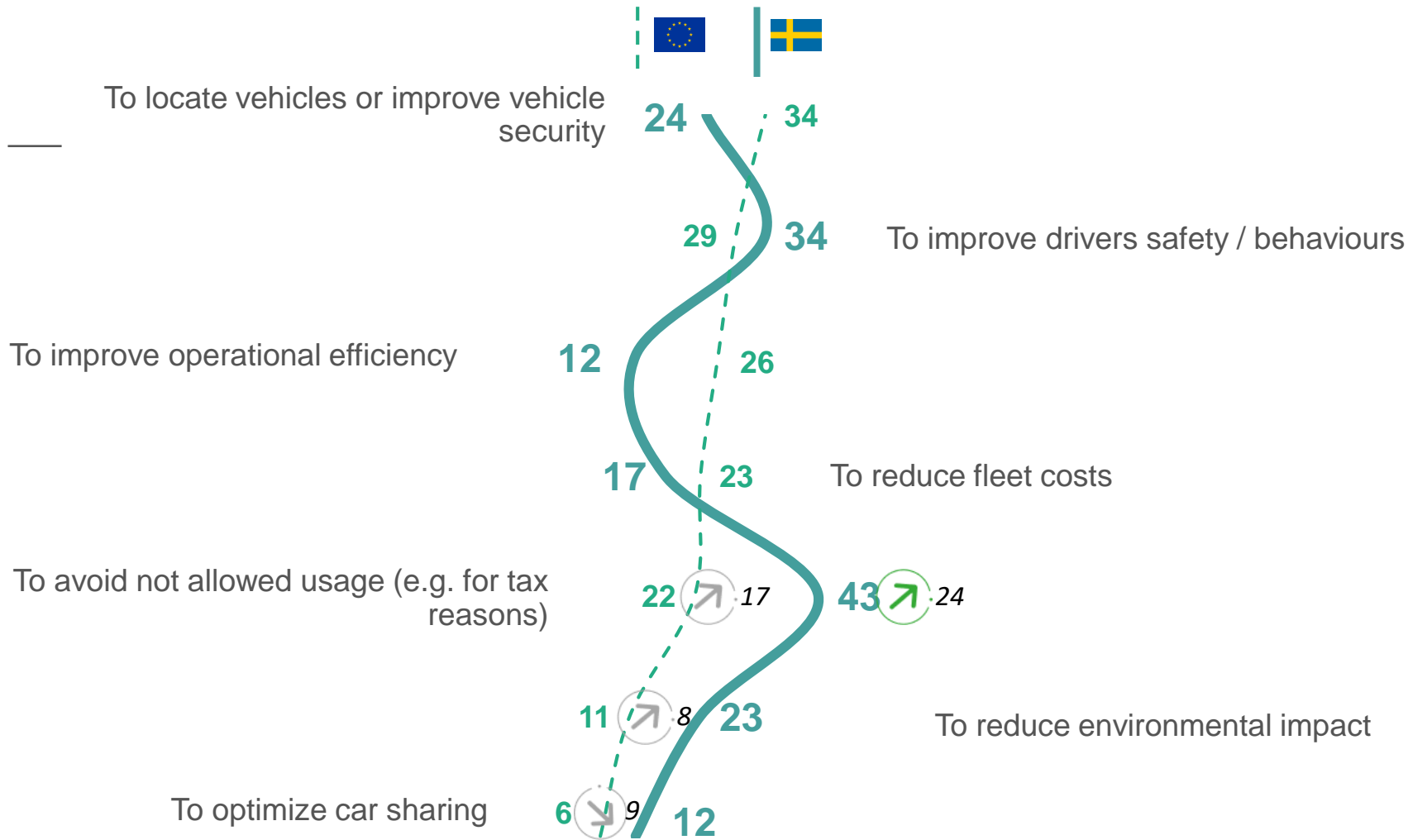
REASONS FOR USING CONNECTED VEHICLES

LCVs

In %



LCVs



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



Thank you