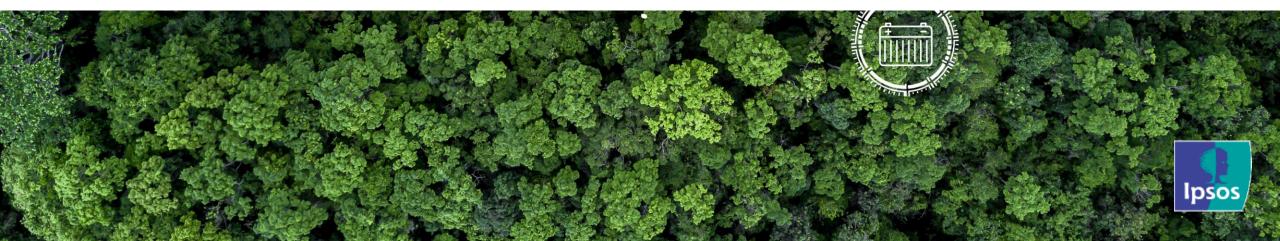


MOBILITY AND FLEET BAROMETER 2024

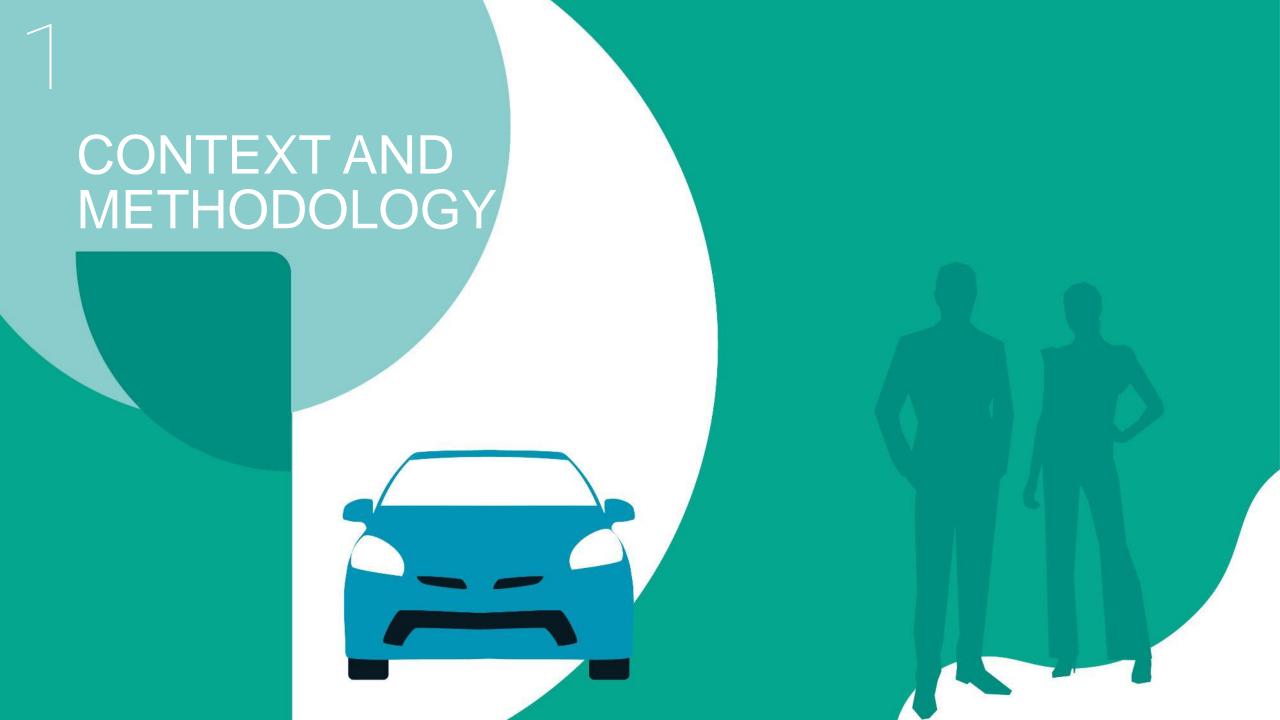


2024 MOBILITY AND FLEET BAROMETER

O1 Context and methodology	n 2
02 Executive summary	рЗ
03	p11
What are the main characteristics of fleets?	the <i>p17</i>
How are companies financing their fleet?	, р44

05	
What changes are to be expecte near future regarding energy mix	(?
06 What are the perspectives in terms	<i>p56</i> ms of
mobility solutions?	404
What are the usages in terms of connected vehicles, digital tools safety equipments?	
	p138





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?

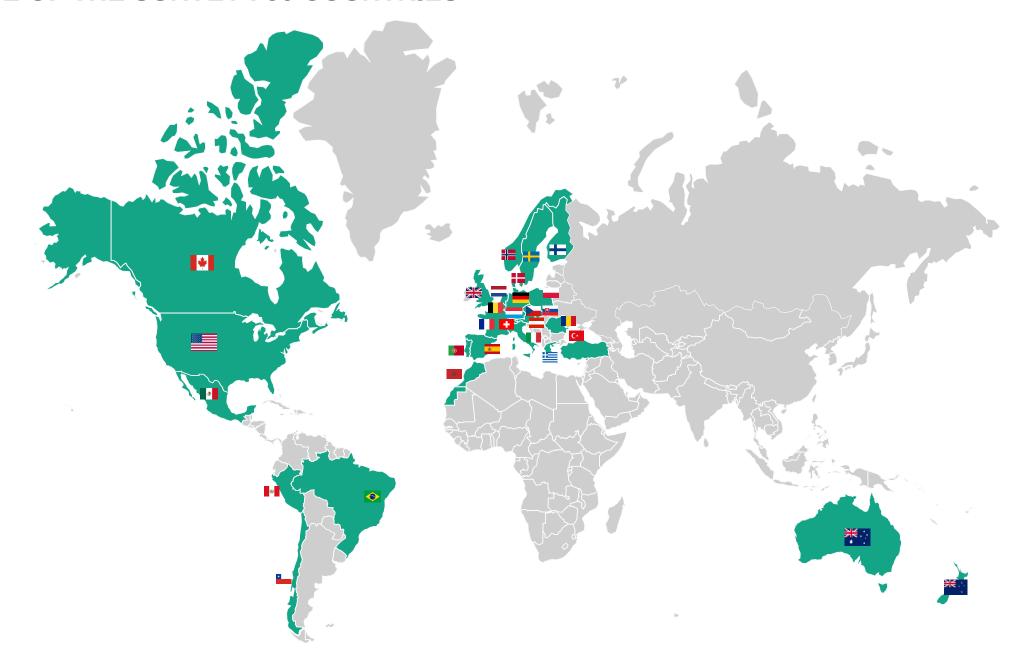


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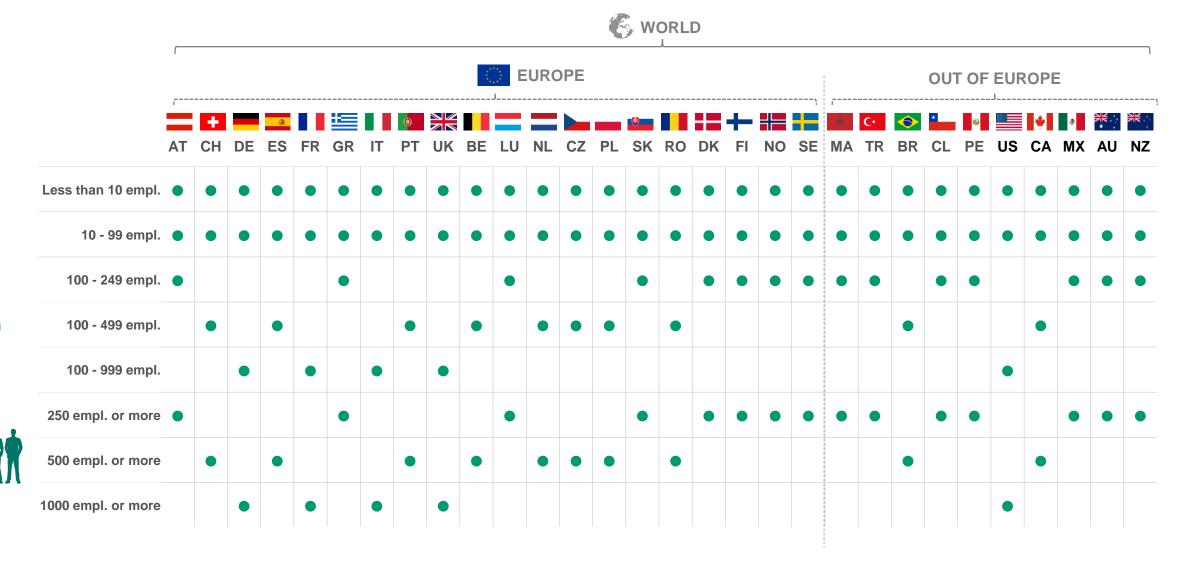
HOW DO MOBILITY
SOLUTIONS IMPACT
FLEET MANAGEMENT?



SCOPE OF THE SURVEY: 30 COUNTRIES



COMPANY SIZE SEGMENT DEFINITION





METHODOLOGY













DATA COLLECTION **METHOD**

FIELDWORK PERIOD

TARGET

QUOTAS

SAMPLE

DURATION OF INTERVIEW

CATI SYSTEM (Computer Assisted Telephone Interviewing) Recruitment by telephone



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

COMPANY SIZE & SECTOR

Europe

Americas

Rest of the world (TR,MA,AU,NZ)

Interviews 8605

26 minutes on average

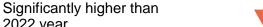
READING NOTES ABOUT THE REPORT

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 = score 2023 or 2022

2022 year



Significantly lower than 2023 year



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)/



NUMBER OF INTERVIEWS CONDUCTED IN SWEDEN



Perimeter of the survey: companies owning at least 1 vehicle





Companies with Less than 10 empl. 98 INTERVIEWS



Companies with 10 - 99 empl. 67 INTERVIEWS



Companies with 100 - 249 empl. **77 INTERVIEWS**



Companies with 250 empl. or more **58 INTERVIEWS**

1 to 99
employees
165 INTERVIEWS

100 employees
and more
135 INTERVIEWS



SAMPLE STRUCTURE IN SWEDEN



Company size & sector







TOTAL

13

32

34

21

Construction

Building Construction General Contractors And Operative Builders / Heavy Construction Other Than Building Construction Contractors / Construction Special Trade Contractors

Industry

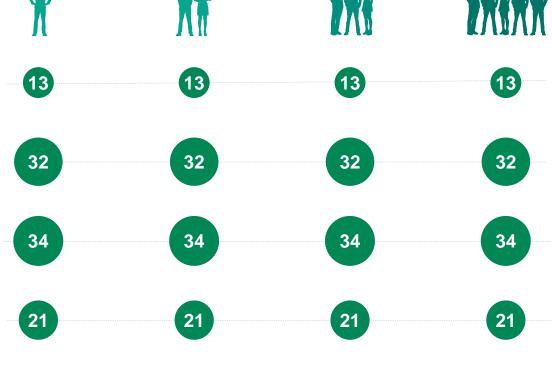
Mining, oil & gas, Manufacturing (e.g. food, tobacco, textile, wood, furniture, printing, publishing, chemicals, fabricated metal products, electronic, machinery, etc...

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

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



Weight of each company size segment









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 PROVIDED BY THE COMPANY TO BOOK MOBILITY SOLUTIONS



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



EXECUTIVE SUMMARY

INSIGHT 1: SWEDISH FLEET MANAGERS REMAIN VERY OPTIMISTIC ABOUT THE FUTURE



LESSER INTEREST FOR SECOND-HAND VEHICLES

- Swedish managers yield the strongest confidence in Europe about the future of their fleets, with 96% anticipating stability or increase. Large companies, which voiced some doubts in 2023, are now aligned with smaller businesses, for both passenger cars and LCVs.
- This expected growth is mostly related to HR needs (recruiting or retaining plans), as well as, to a much lesser extent than their European counterparts, business development.
- Aligned with Europe, homeworking still has a limited anticipated effect on mobility policies in Sweden in 2024.

- Fleet managers consider vehicle delivery times, alternative fuel technologies, and responsible driving as the most important challenges they will face in the next three years.
- As observed in 2023, Swedish fleet turnover is higher than European standards, with a **vehicle lifecycle of** 4.7 years in Sweden, vs 5.5 on average.



INSIGHT 2: OPERATING LEASING REMAINS THE PREFERRED FINANCING METHOD IN SWEDEN



OPERATING LEASING STILL SHOWS SOME POTENTIAL TO GROW FURTHER

- Operating leasing is still the main financing method in Sweden in 2024, followed by financial leasing. These results are in line with 2023. For LCVs, operating and financial leasing are at the same level.
- Even though it is quite widespread, operating leasing still has potential to develop further in Sweden, with 1/5 companies interested in implementing or increasing its share in their financial plans.
- On the one hand, operating leasing continue presenting financial advantages for fleet managers, e.g. fixed monthly rentals, and the possibility to keep capital into the business and reducing risk, as well as more practical added values, such less vehicle administration, benefiting from a full package, and choosing flexible contracts.

- On the other hand, Swedish fleet managers consider their current leasing partners could improve on flexibility and price competitiveness.
- Total cost of ownership remains a top challenge related to fleet management in Sweden, like last year, followed by CO₂ cap. Of note: environmentally friendly cars appear less of an important challenge in 2024 than last year



INSIGHT 3: SWEDEN REMAINS A EUROPEAN LEADER WHEN IT COMES TO ALTERNATIVE FUELS TECHNOLOGIES



INTEREST FOR PLUG-IN HYBRIDS DECREASES, WHILE 100% BEVS CONFIRMS ITS POTENTIAL, DESPITE CHARGING POINTS BARRIER

- In 2024, Sweden consolidates its position as a champion of alternative fuels technologies, only surpassed by Norway.
- Usage and consideration is still higher than Europe for both passenger cars and LCVs, and for all technologies offered, though interest in hydrogen fuel cells is less pronounced.
- 100% BEV confirm its potential while Interest for PHEV decreases.
- But access to public and private charging points are still the most important barriers to BEV voiced by fleet managers. 1/4 companies are already supporting drivers in installing charging points, or consider doing so.

- Reasons to shift continue to crystallize on lowering one's environmental impact, much more so than in Europe.
- Eligibility to ESG reporting could be improved, as less than 6/10 of Swedish companies consider themselves eligible today or within two years, and 1/3 do not know if they are.
- Employee mobility takes a medium to high importance in the ESG reporting approach for a large majority of those eligible, though slightly below the European norm.



INSIGHT 4: SWEDEN CONTINUES DEVELOPING MOBILITY SOLUTIONS, IN LINE WITH EUROPEAN TRENDS



RIDE SHARING REMAINS A TOP MEASURE, WITH THE HIGHEST POTENTIAL

- In 2024, mobility solutions implementation is on the rise in Sweden and in Europe, with 85% companies having adopted at least one.
- Ride sharing remains the preferred solution in Sweden, with high usage and potential for the next three years.
- Yet, these mobility alternatives remain perceived as addons to existing fleets, rather than substitutes.
- One in five Swedish companies has organized a mobility plan



INSIGHT 5: SOLID ADOPTION OF CONNECTED VEHICLES IN SWEDEN, WITH MODERATE POTENTIAL TO DEVELOP THE USE OF TELEMATICS DATA



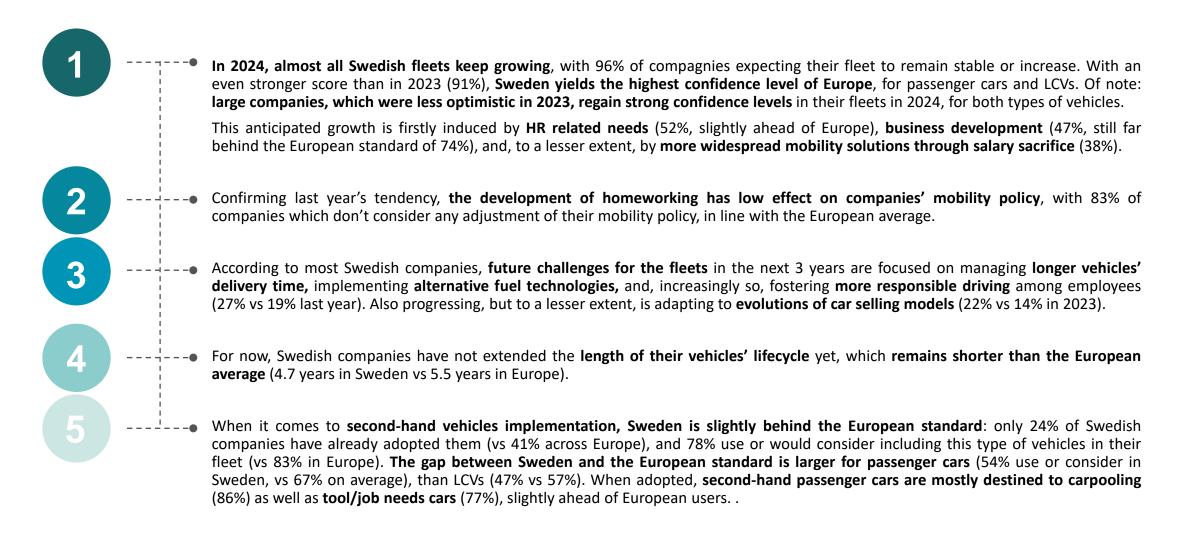
- In terms of implementing connected vehicles, Sweden is in line with European trends, with 38% companies already equipped. Adoption is slightly higher for LCVs than passenger cars.
- However, only 14% of Swedish companies actually use telematics data in 2024, also aligned with their European counterparts.
- The potential for telematics on the Swedish market is present, but moderate compared to the European average, with a 51% intent to use data (vs 60% in Europe).



WHAT ARE THE MAIN CHARACTERISTICS OF THE FLEETS?



SWEDISH COMPANIES ARE THE MOST CONFIDENT IN EUROPE ABOUT THE FUTURE OF THEIR FLEETS





FLEET PROFILE

MOBILITY POLICY

ADAPTATION

COINCIDING WITH

HOMEWORKING



15%

changed the policy or consider changing







FLEET POSSESSION

LENGTH





years

years











ANTICIPATED

FLEET EVOLUTION

(% will increase or remain stable)







RESPONDENTS POSITION WITHIN THE COMPANY





Passenger	cars +	LCVs
-----------	--------	------

CEO / Managing director

31

Fleet director / manager

18

Procurement director / manager

Finance director / officer / manager / CFO

20

COO (Chief Operations Officer)

HR director/ manager

CSR director / officer / manager

Facility manager

Mobility manager

Other, please specify







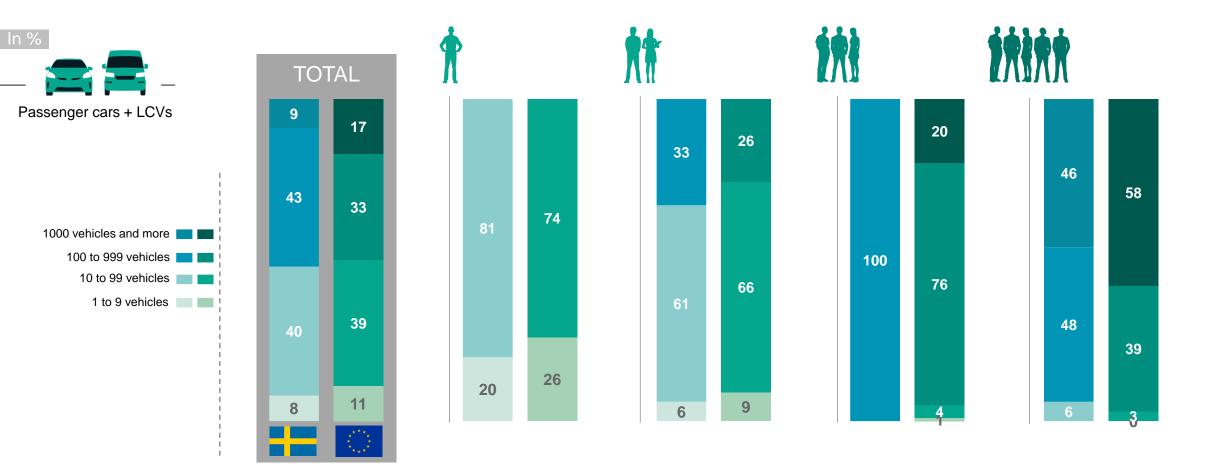


29

18



NUMBER OF VEHICLES IN FLEET



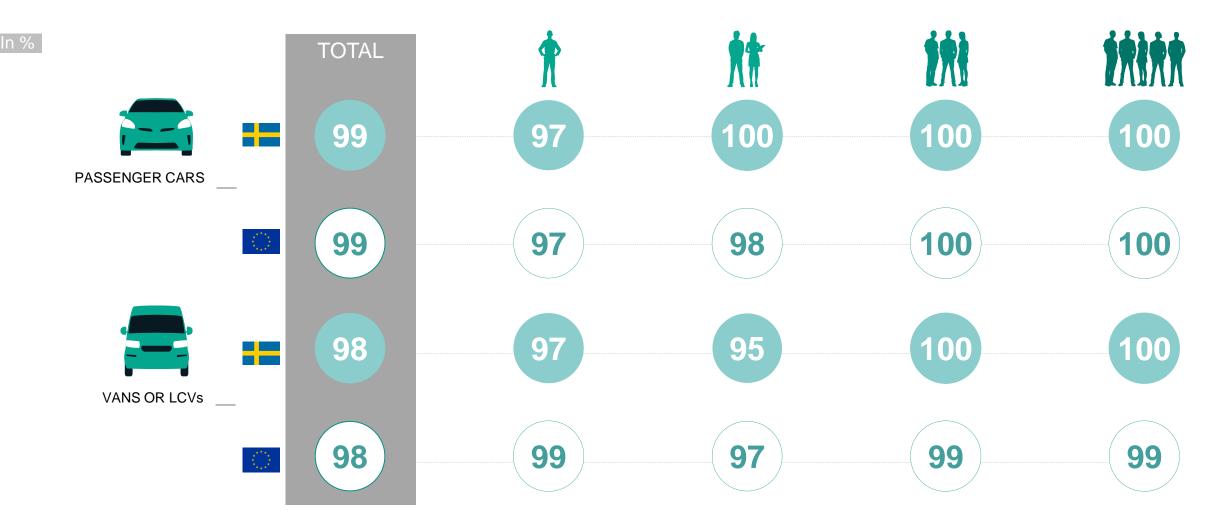


Can you please tell us the total number of vehicles of less than 3.5 tons in your fleet?

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)

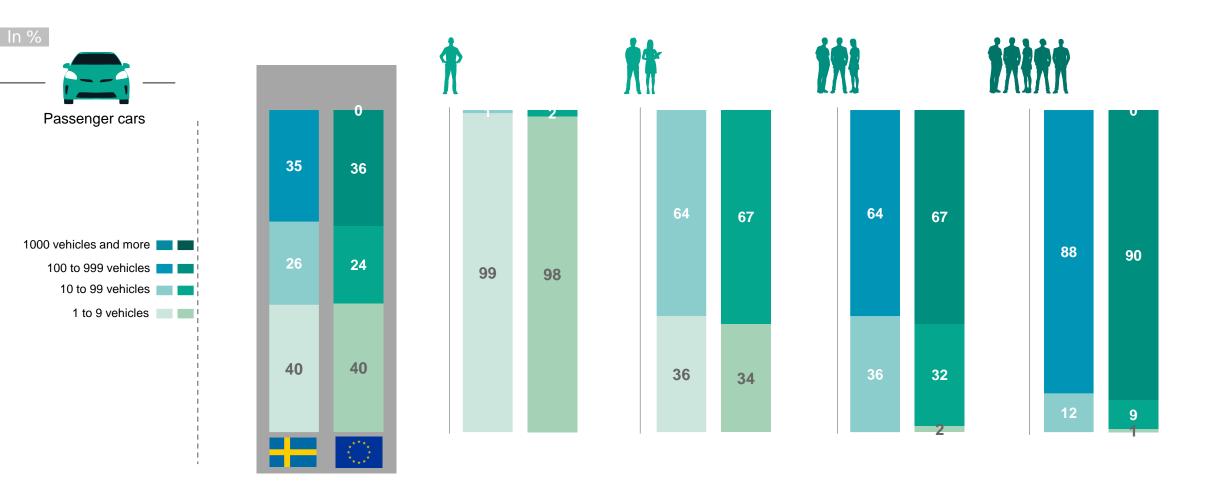




And can you please tell us the total number of cars in your fleet? / And can you please tell us the total number of LCVs or vans in your fleet?

Basis: companies with corporate vehicles = 100%

NUMBER OF PASSENGER CARS IN FLEET

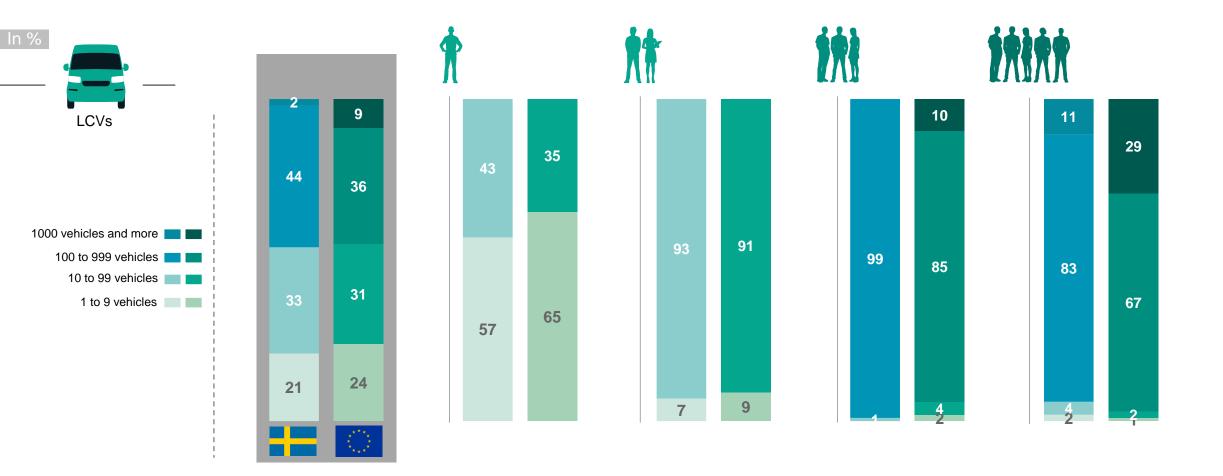




And can you please tell us the total number of cars in your fleet?

Basis: companies with passenger cars

NUMBER OF LCVS IN FLEET





And can you please tell us the total number of LCVs or vans in your fleet?

Basis: companies with LCVS

VEHICLES POSSESSION LENGTH





On average, how long do you keep your vehicles (before being sold or giving back to the leasing company)?

Basis: companies with corporate vehicles = 100%

PASSENGER CARS POSSESSION LENGTH





LCVS POSSESSION LENGTH





FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS?

In Sweden, 96% of the companies declare that in the next 3 years their company fleet will remain stable or increase.

92

25

67

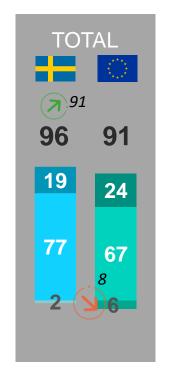


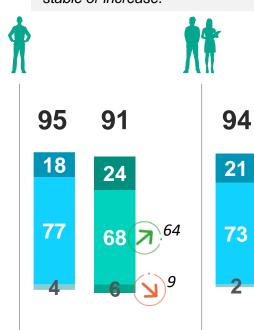
% Stable or increase

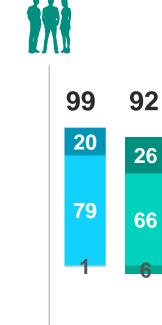
Increase

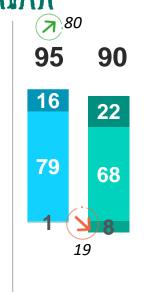
Remain stable

Decrease











2024	+16 +18	+13 +17	+19 +19	+18 +20	+15 +15
2023	+12 +16	+14 +15	+15 +16	+18 +17	-2 +16
2022	+14 +18	+13 +19	+7 +17	+10 +17	+27 +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%



FLEET GROWTH POTENTIAL



HOW TO READ THE RESULTS?

In Sweden, 96% of the companies declare that in the next 3 years their company fleet will remain stable or increase.



Passenger cars + LCVs % Stable or increase Increase 2 68 71 **69** Remain stable 70 Decrease









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 %

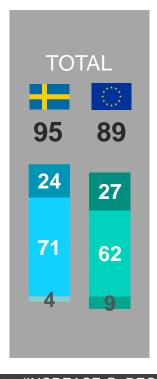
Passenger cars

% Stable or increase

Increase ___

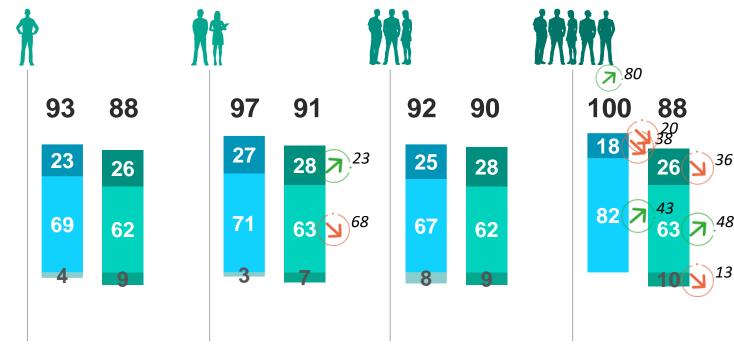
Remain stable —

Decrease ___



HOW TO READ THE RESULTS?

In Sweden, 95% of the companies declare that in the next 3 years the total number of passenger cars will remain stable or increase.

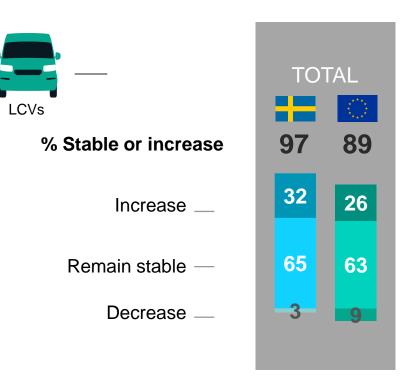


BALANCE in pts (INCREASE ⊕ DECREASE)



LCVS FLEET GROWTH POTENTIAL

In %



HOW TO READ THE RESULTS?

In Sweden, 97% of the companies declare that in the next 3 years the total number of LCVs will remain stable or increase.



BALANCE in pts (INCREASE DECREASE)



REASON FOR FUTURE FLEET INCREASE



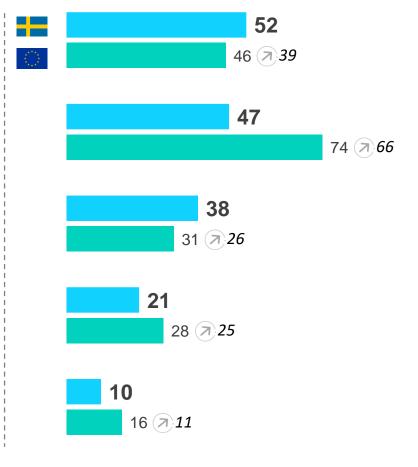
Because of HR related needs like talent recruitment, retaining of employees etc.

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

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

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

Because of tax decreases









SECOND-HAND VEHICLES

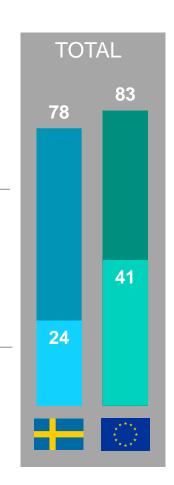
ln %



Passenger cars + LCVs

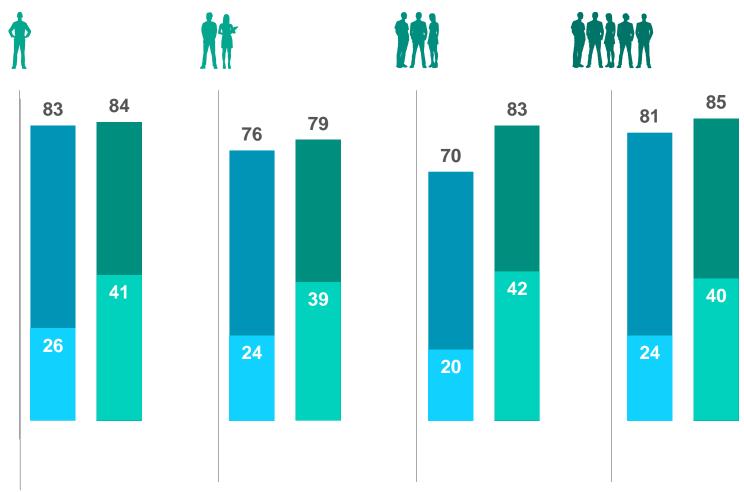


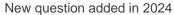




HOW TO READ THE RESULTS?

In Sweden, 78% of the companies are already using or consider to use second-hand vehicles in the next 3 years. 24% of the companies are currently using some.





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%



SECOND-HAND VEHICLES FOR PASSENGER CAR FLEET

TOTAL

54

16

67

29

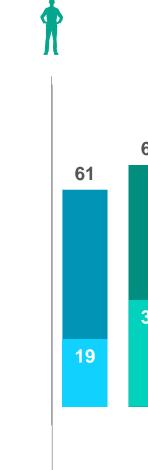


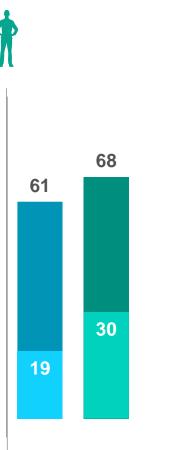
Passenger cars

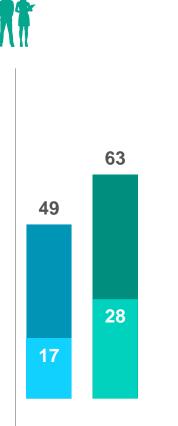


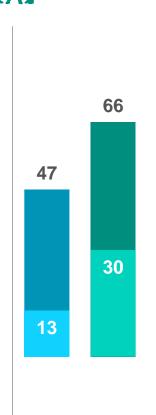


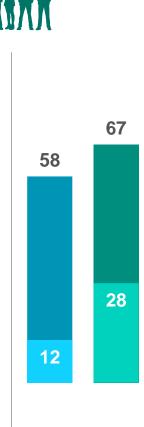
In Sweden, 54% of the companies are already using or consider to use second-hand vehicles in the next 3 years. 16% of the companies are currently using some.











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 passenger cars



SECOND-HAND VEHICLES FOR LCVS CAR FLEET

HOW TO READ THE RESULTS?

In Sweden, 47% of the companies are already using or consider to use second-hand vehicles in the next 3 years. 12% of the companies are currently using some.



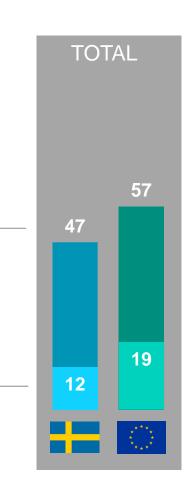


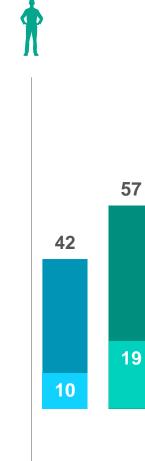
ALREADY

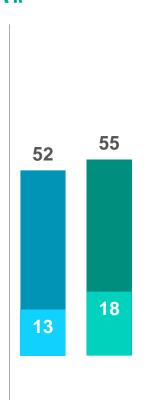
USING OR CONSIDER USING IN THE NEXT 3 YEARS

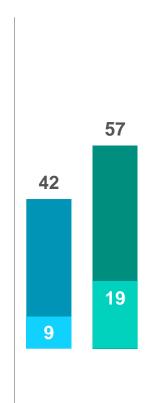
ALREADY

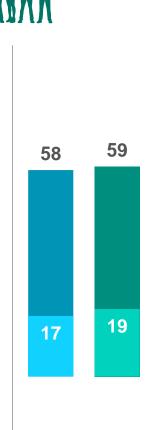
USING











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 LCVS**



TYPE OF USE OF USED / SECOND-HAND PASSENGER CARS

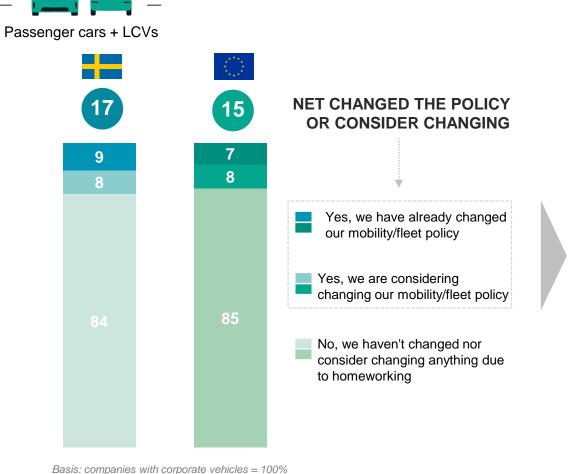
TOTAL Passenger cars Pool cars Tool cars / Job needs cars For benefit drivers Don't know

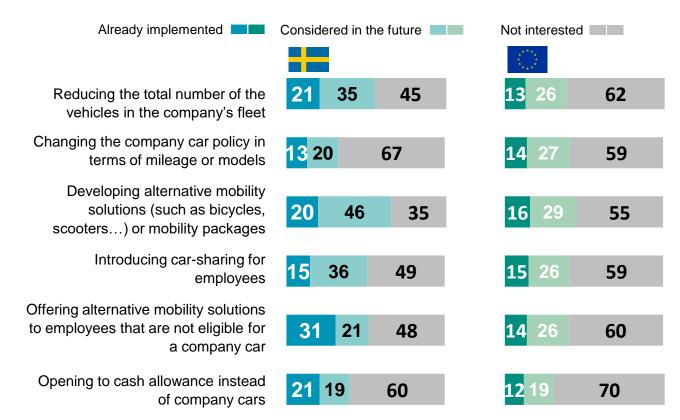


MOBILITY POLICY ADAPTATION COINCIDING WITH HOMEWORKING

HOW TO READ THE RESULTS?

In Sweden, <u>among the companies that changed or consider changing their mobility policy</u>, 21% 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



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?

MOST IMPORTANT CHALLENGES EXPECTED





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

Adapting to restrictive public policies on petrol and diesel vehicles

Inducing more responsible driving among employees

Managing longer vehicles' delivery time

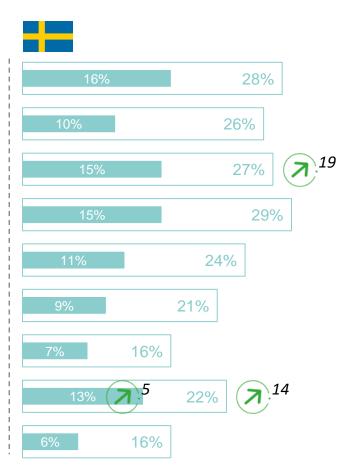
Mitigating the increase of total cost of ownership of the vehicles

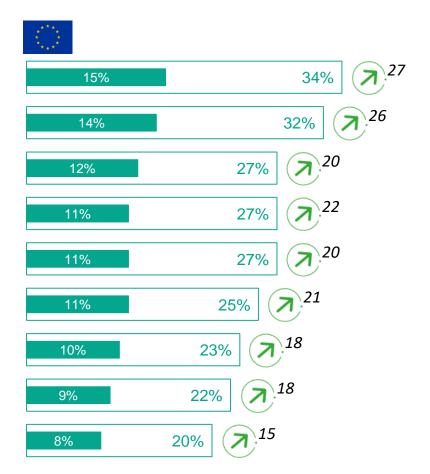
Adapting to the expansion of low emission zones in urban areas

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...)



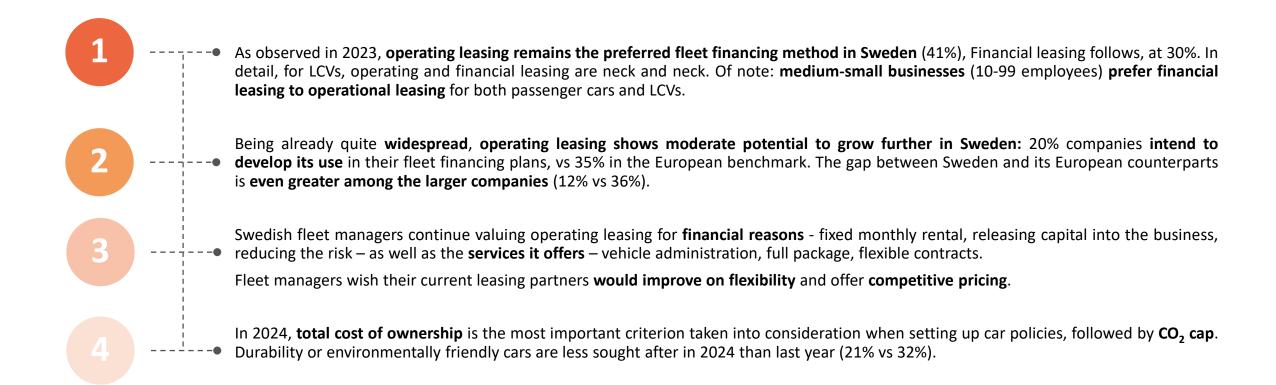




4

HOW ARE COMPANIES FINANCING THEIR FLEET?

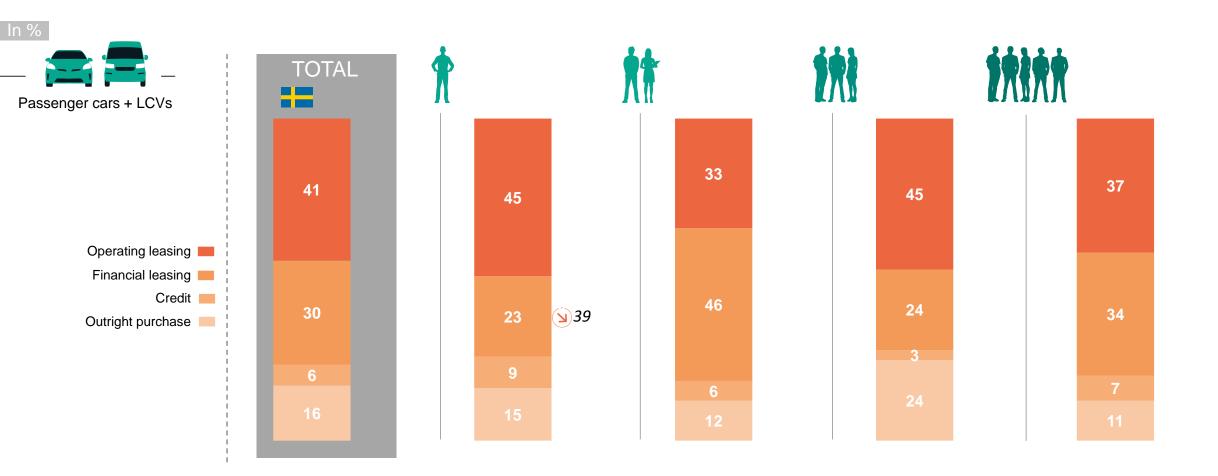
SWEDEN CONTINUES RELYING HEAVILY ON OPERATING LEASING







MAIN FLEET FINANCING METHOD



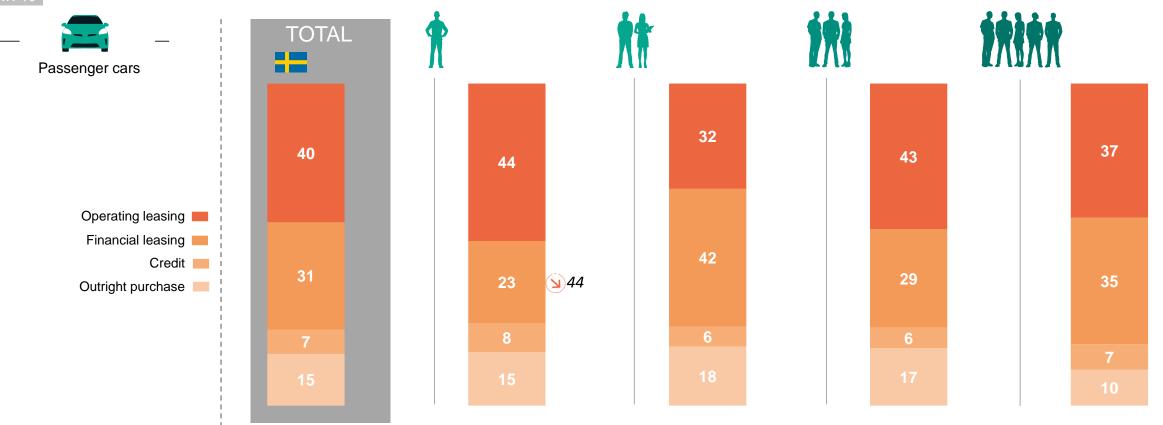


What is the main financing method used to finance your company vehicles today?

Basis: companies with corporate vehicles = 100%

MAIN PASSENGER CARS FINANCING METHOD

In %





And what is the main method used to finance your passenger cars today?

Basis: companies with passenger cars

MAIN LCV FINANCING METHOD

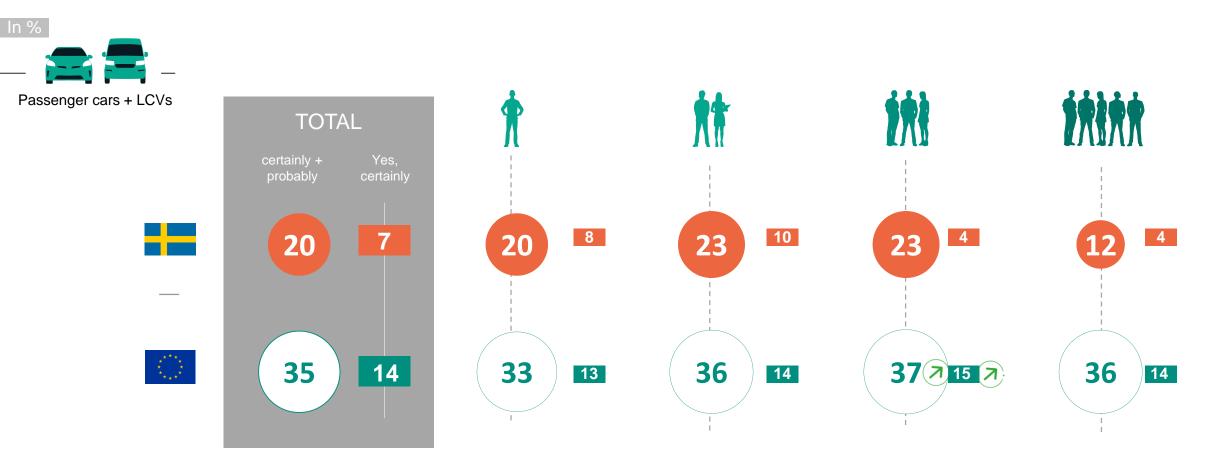
ln %





INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATING LEASING

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





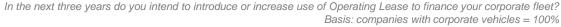
In the next three years do you intend to introduce or increase use of Operating Lease to finance your corporate fleet?

Basis: companies with corporate vehicles = 100%

INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATING LEASING

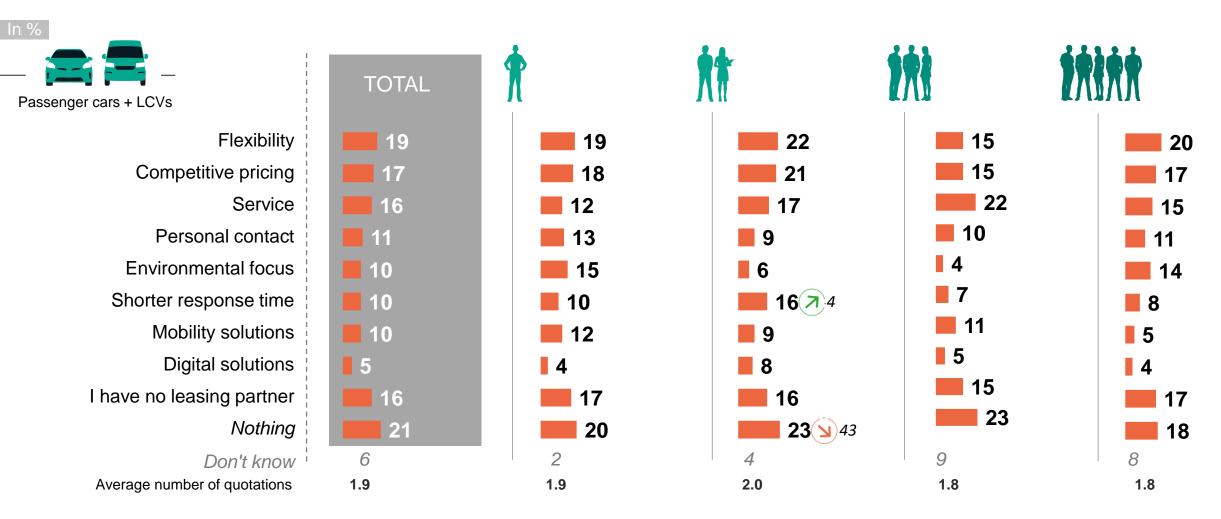
Proportion of companies having the intention to introduce or increase the use of operating leasing







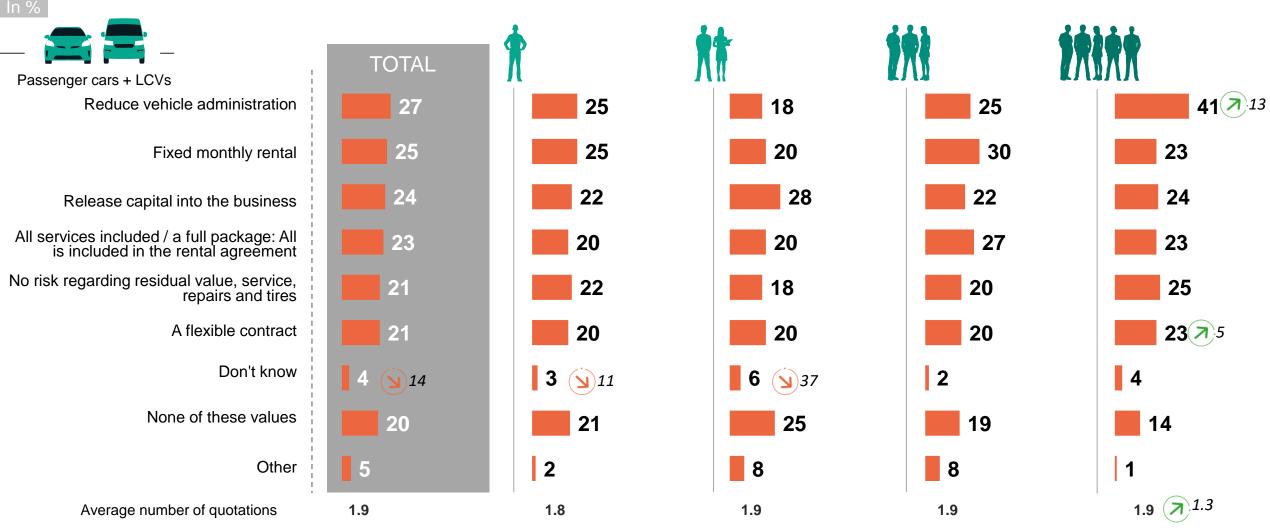
SERVICES MISSING FROM THE CURRENT LEASING PARTNER





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

MAIN ADDED VALUES OF OPERATING LEASING





According to you, what are the main added values of Operating Leasing for company vehicles?

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%

NEXT COMPANY VEHICLES FINANCING METHODS

TOTAL Passenger cars + LCVs 61 50 50 51 46 51 66 52 **72** 71 Leasing with purchase option / Financial leasing with 19 19 residual value risk for the 19 25 17 22 31 22 lessee Car credit Credit dedicated to 30 33 car purchase 38 7.29 43 45 31 Outright purchase Renting with all services in 48 and no purchase in the end



How will you proceed to finance your next new company vehicles?

Basis: companies with less than 100 employees

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



SWEDEN WELL AHEAD OF EUROPE ON ALTERNATIVE FUEL VEHICLES

As in 2023, a very large majority of Swedish companies (84%) have already adopted at least one alternative fuel technology for their passenger cars, placing Sweden at the forefront of Europe, alongside France (83%), the UK (82%) and Norway (80%), and far ahead of the European norm (49%). Consideration (users and those who contemplate adopting the technology in the upcoming 3 years), is also almost universal, at 91%, vs 77% in Europe. Current energy mix for passenger cars in 2024: current use or consideration for the next three years favours 100% BEV (65%, well above Europe), and plug-in hybrids (61%, still way ahead of Europe, but declining from 72% in 2023, pulled down by a decrease among large companies), followed by hybrids (49%, slightly above Europe). Expected energy share for the future fleets clearly highlights 100% BEVs (40%) over other technologies. Sweden levels with the UK on this split, but Norway is clearly ahead. Sweden, the UK and Norway are far above the European norm (20%). Regarding LCVs, alternative technologies' adoption remains higher than the European average for both 100% BEVs and hydrogen fuel cell, especially among the larger companies for 100% BEVs (31% vs 14% to 21% in smaller companies). Here again, Sweden follows Norway in the expected 100% BEVs fleet shares, and is far ahead the European norm (38% for Sweden, 13% for Europe). Despite a strong enthusiasm towards 100% BEVs, access to public charging points remains a very strong barrier in Sweden, more so than in Europe (59% vs 36%). The limited range of vehicles and lack of charging points at home both rise in 2024, becoming the second and third constraints. 1/4 Swedish companies support their drivers (or are willing to do so) for the installation of charging points, including 1/3 of small companies (10-99) employees). In a country traditionally highly involved in ecology, reasons to shift towards these alternative technologies remain focused on lowering environmental impact, still far ahead of the European benchmark for both vehicle types. Company image, CSR policies and driving in low emissions zones are also important motives, as well as economical incentives, such as reducing fuel expenses, total cost of ownership. Lastly, 57% companies consider themselves already eligible to ESG regulatory public reporting, or will be within 2 years, in line with the rest of Europe (60% on average). Lack of knowledge is quite high at 34%, vs 27% in Europe overall. Employees mobility in the ESG reporting approach is considered of medium or high importance by 85% of Swedish companies, slightly below the European standard (91%).



ENERGY MIX



AT LEAST ONE ALTERNATIVE

IMPLEMENTED OR CONSIDERED*

for Passenger cars

ALREADY
USING OR
CONSIDER
USING IN THE
NEXT 3 YEARS

91%

77%







AT LEAST ONE ALTERNATIVE

IMPLEMENTED

for Passenger cars

84%

59%







EXPECTED PART OF 100%

ELECTRIC PASSENGER CAR IN 3 YEARS











EXPECTED PART OF 100%

ELECTRIC LCV IN 3 YEARS









SUPPORTING DRIVERS FOR THE INSTALLATION OF CHARGING POINTS



TOTAL









% Yes

26

25

33

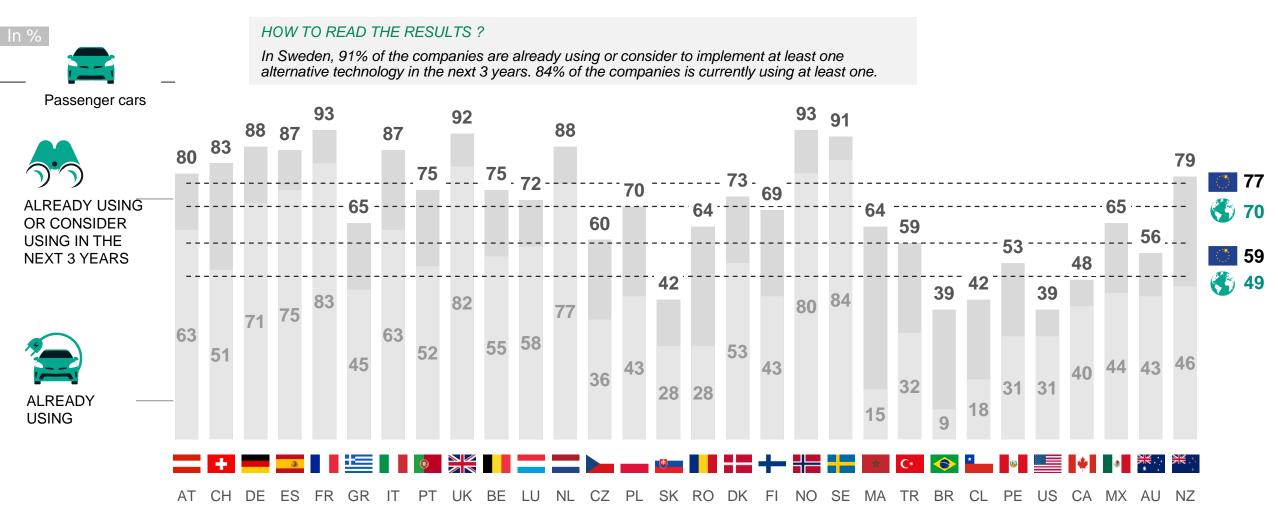
24

25



CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

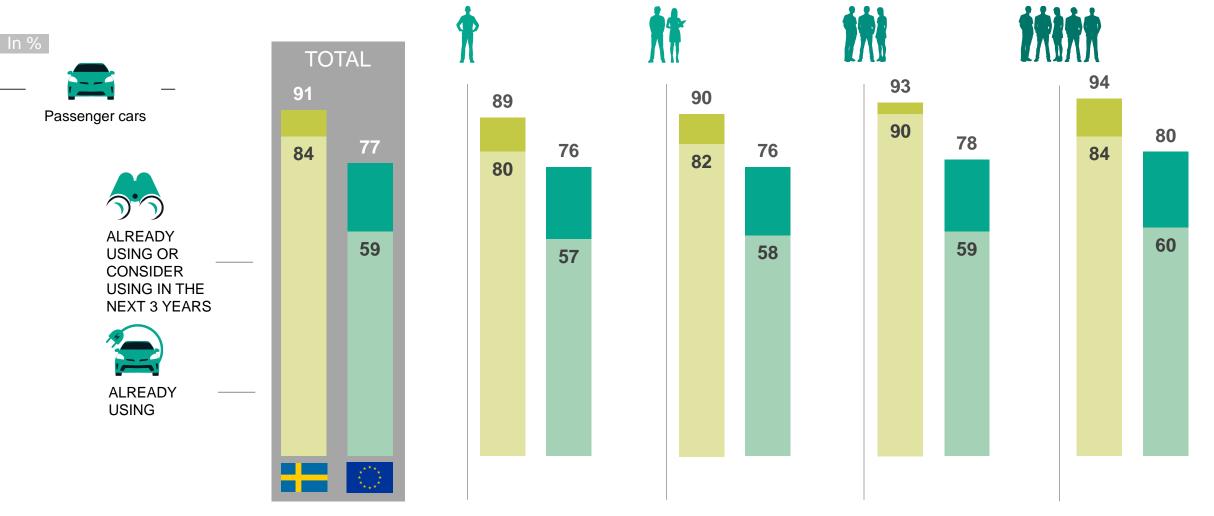
(At least one technology among HEV, PHEV and 100% BEV)





CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

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

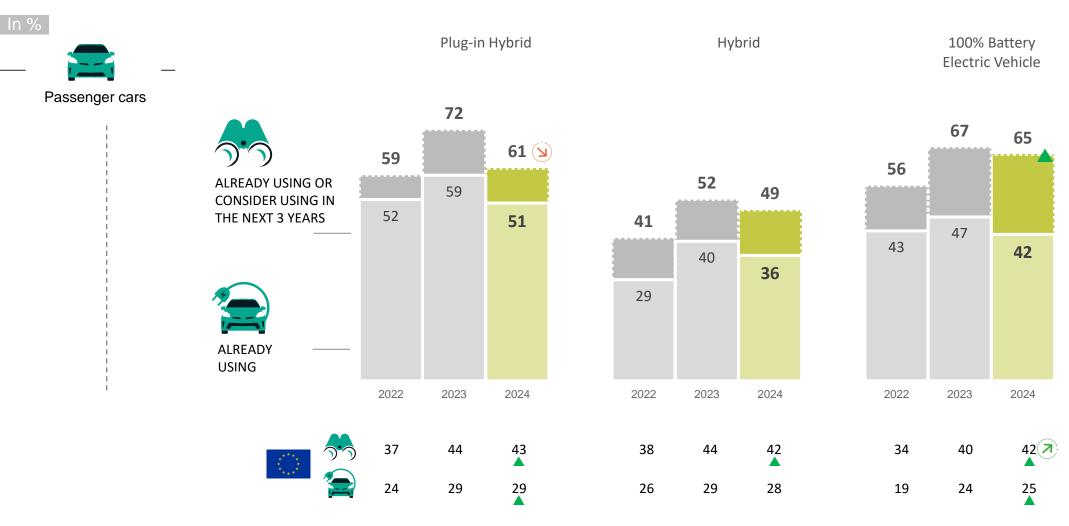




Amongst the following alternative fuel technologies, which ones do you currently use...?

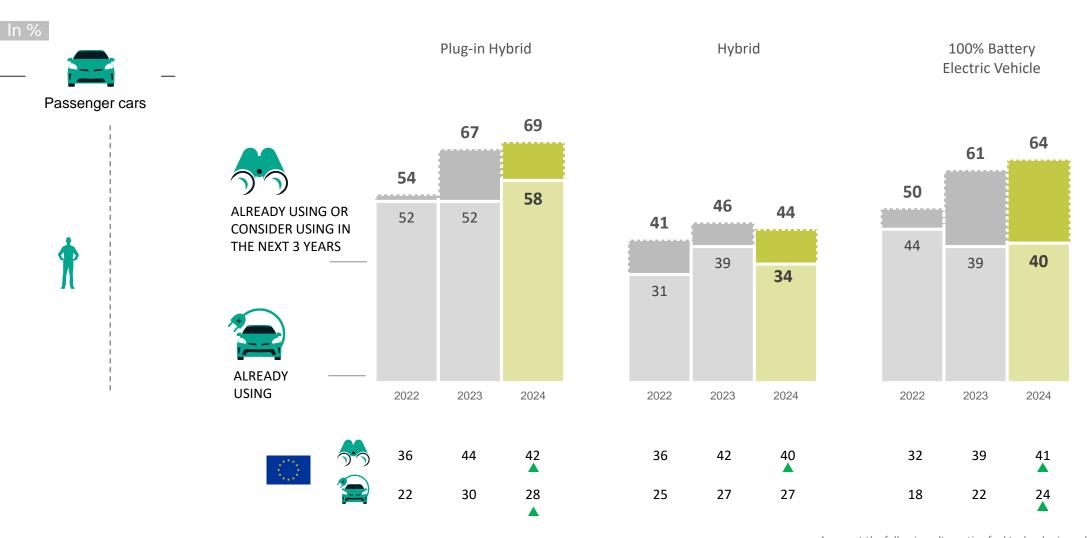
Amongst the following alternative fuel technologies, which ones are you considering using...?

Evolution vs. previous years



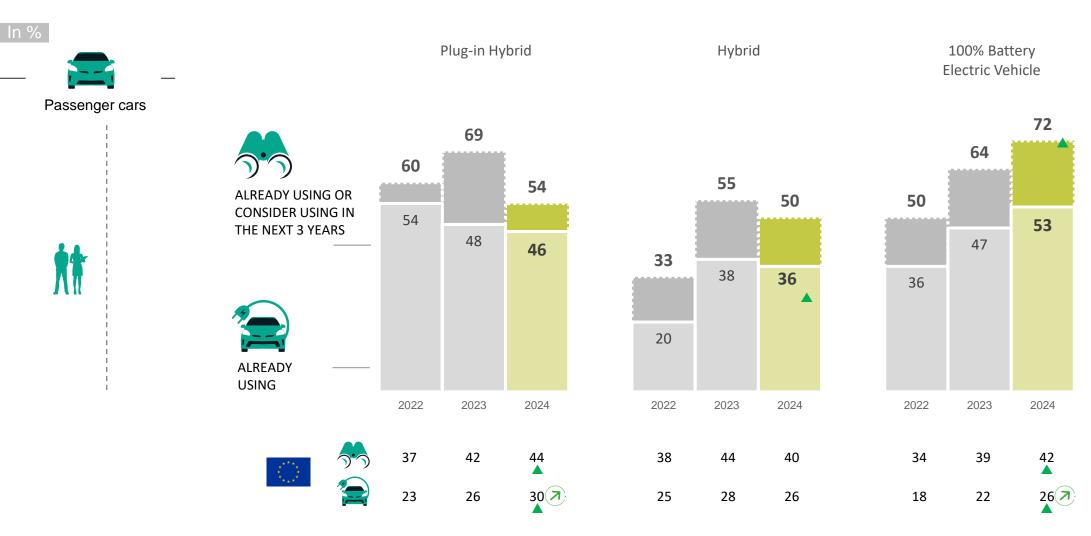


Evolution vs. previous years – Focus Less than 10 empl.



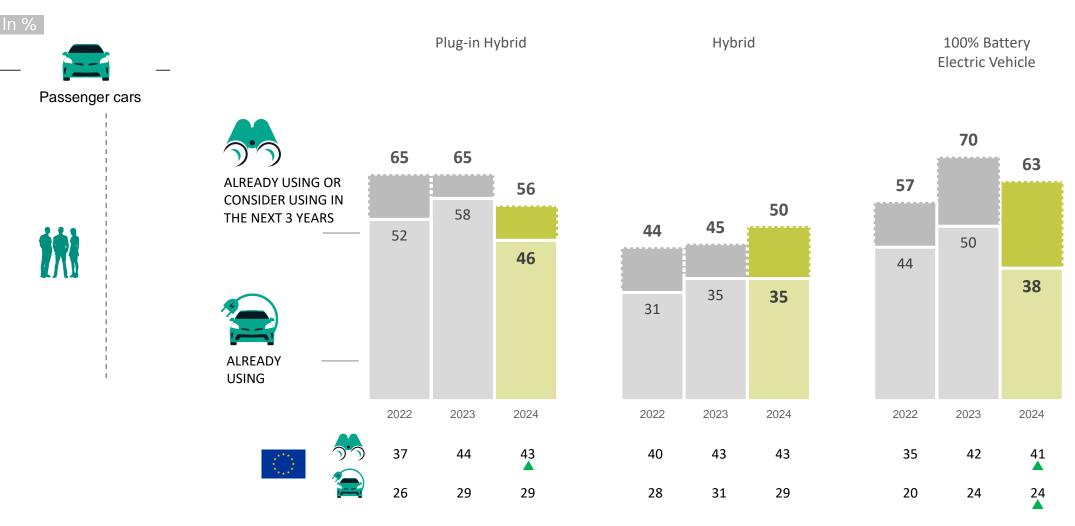


Evolution vs. previous years – Focus 10 - 99 empl.



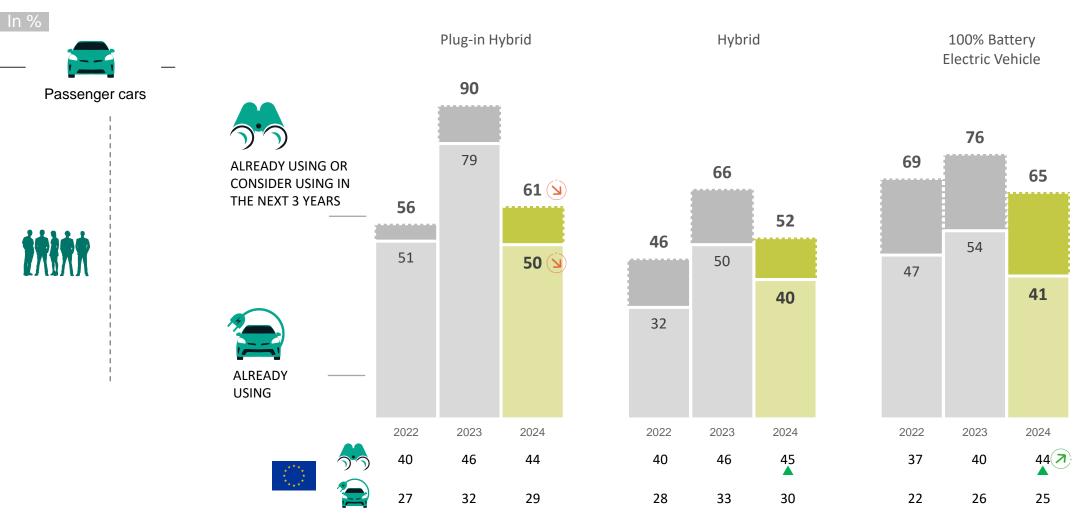


Evolution vs. previous years – Focus 100 - 249 empl.



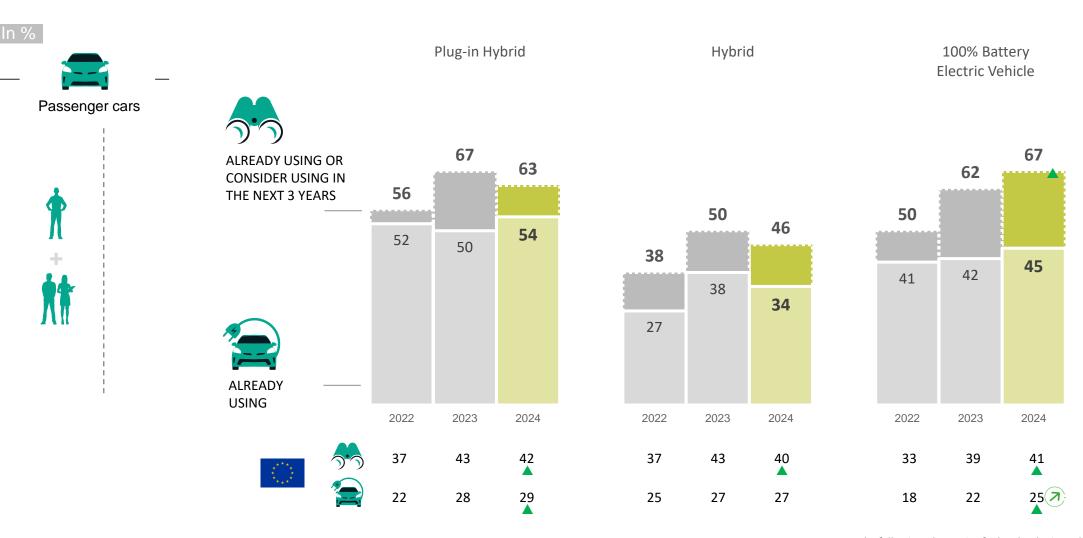


Evolution vs. previous years - Focus 250 empl. or more



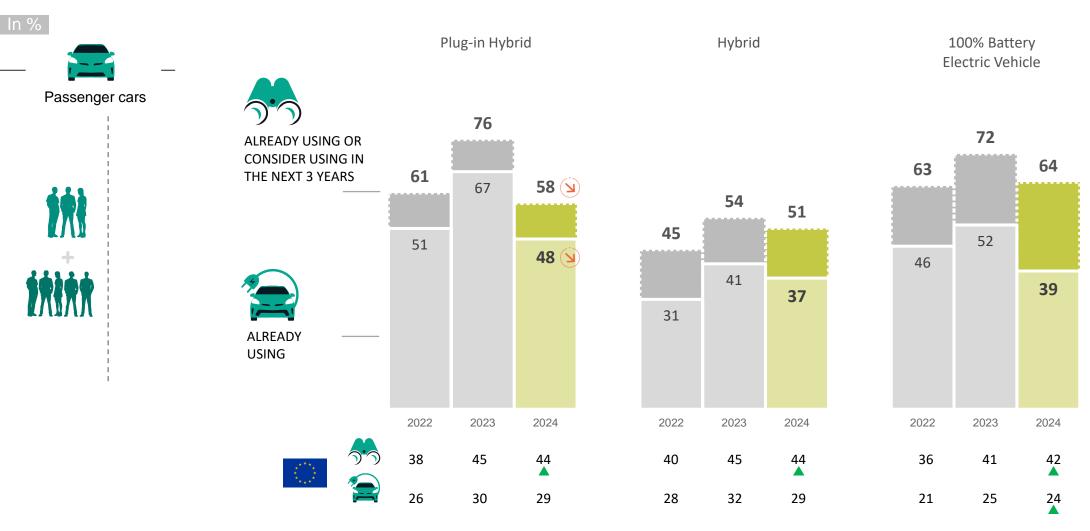


Evolution vs. previous years – Focus on 1 to 99





Evolution vs. previous years – Focus on 100 and more





Passenger car fleet



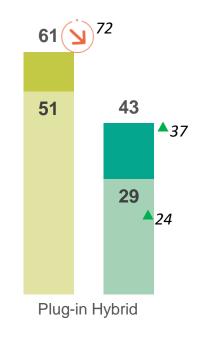


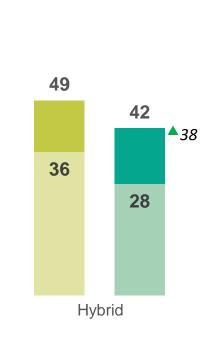


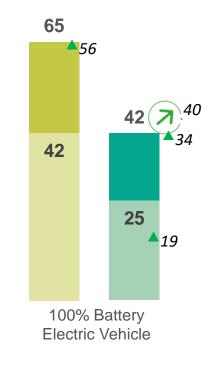










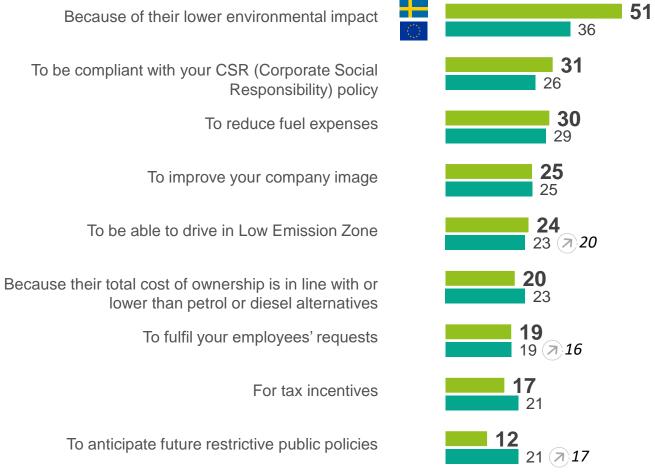




REASONS FOR IMPLEMENTING OR CONSIDERING ALTERNATIVE FUEL TECHNOLOGIES

Passenger car fleet







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)





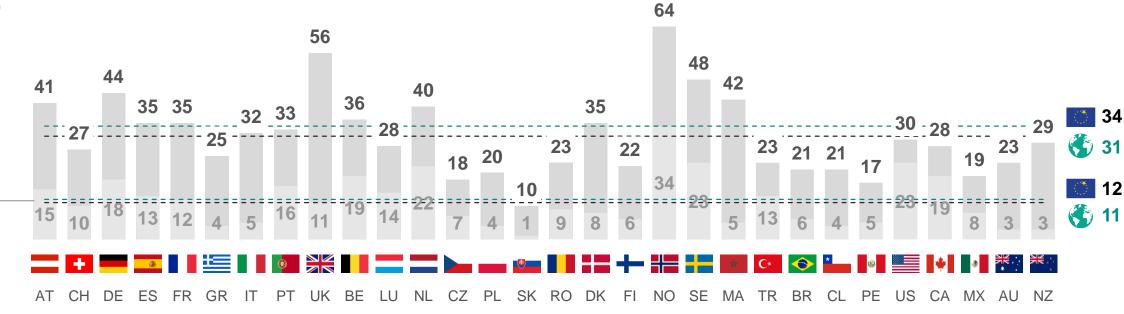
HOW TO READ THE RESULTS?

In Sweden, 48% of the companies are already using or consider to implement at least one alternative technology in the next 3 years. 23% of the companies is currently using at least one.



USING IN THE NEXT 3 YEARS

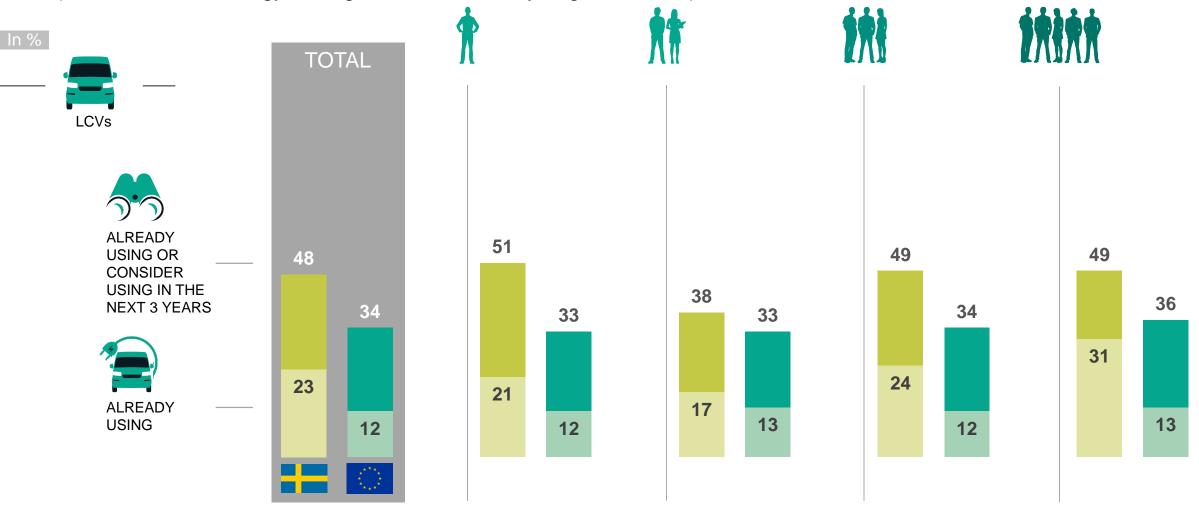






CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

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





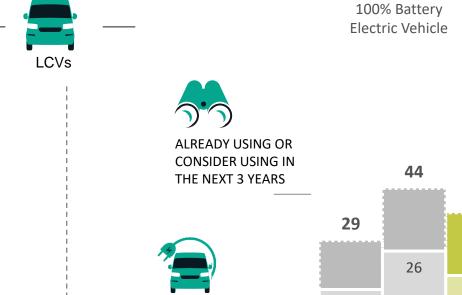
37

19

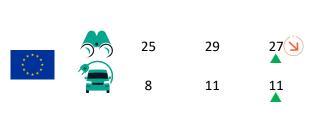
2024

Evolution vs. previous years

In %



ALREADY USING

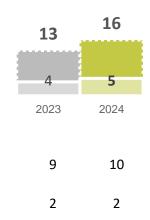


15

2022

2023

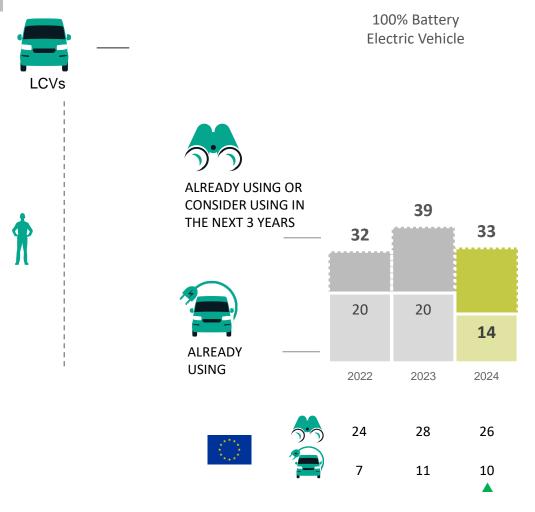
Hydrogen Fuel cell

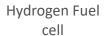


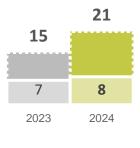


Evolution vs. previous years – Less than 10 empl.









8	10
8	10

2 2



12

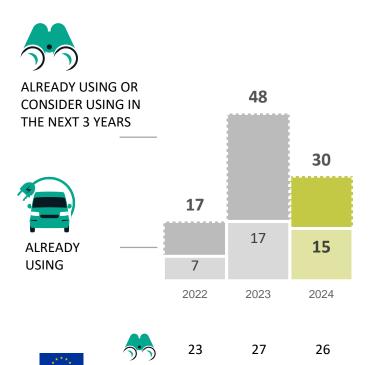
10

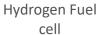
Evolution vs. previous years – 10 - 99 empl.

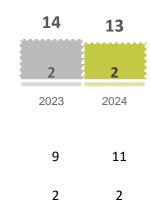




100% Battery Electric Vehicle









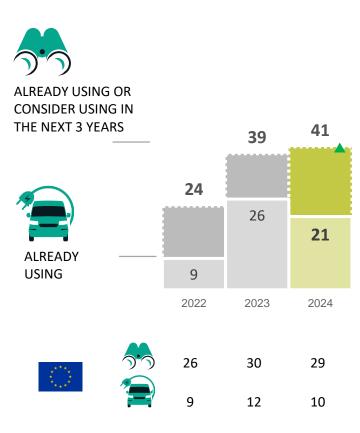
Evolution vs. previous years – 100 - 249 empl.



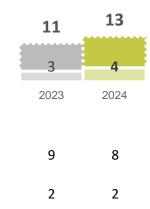








Hydrogen Fuel cell





Evolution vs. previous years – 250 empl. or more

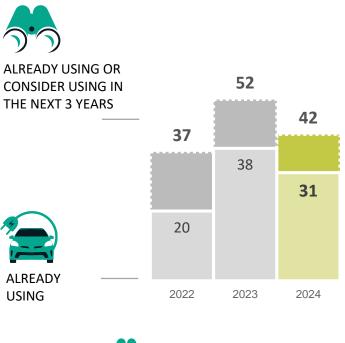




LCVs

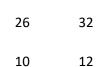


100% Battery Electric Vehicle





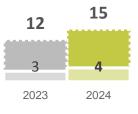




29

11

Hydrogen Fuel cell

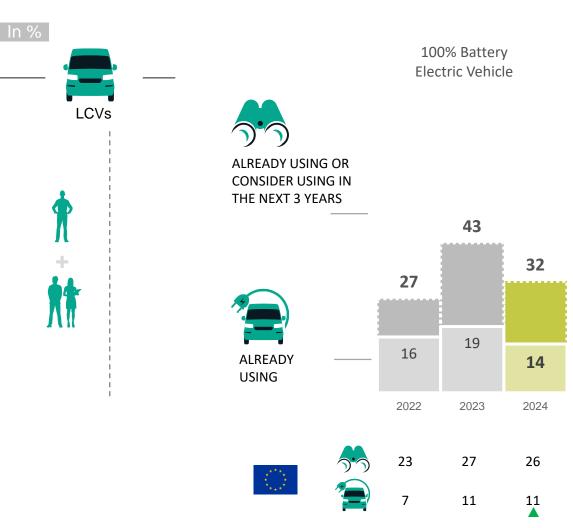


9	10
2	2

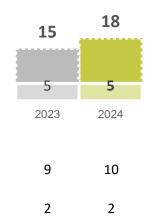


ALTERNATIVE FUEL TECHNOLOGIES USAGE - DETAIL PER TECHNOLOGY

Evolution vs. previous years - Focus on 1 to 99



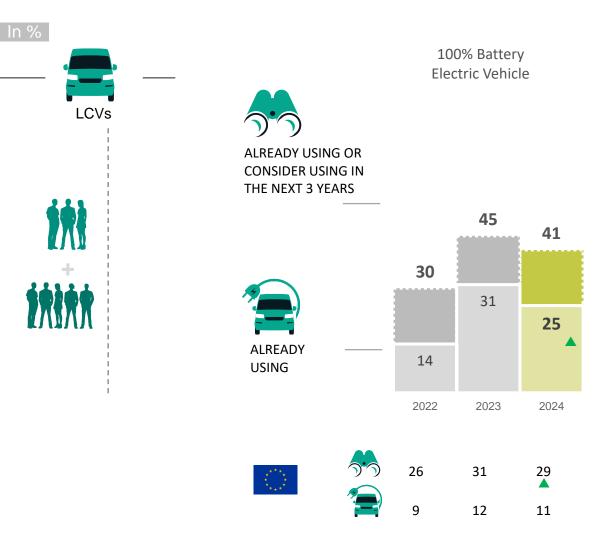
Hydrogen Fuel cell



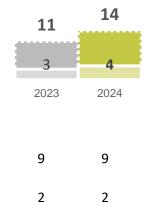


ALTERNATIVE FUEL TECHNOLOGIES USAGE - DETAIL PER TECHNOLOGY

Evolution vs. previous years - Focus on 100 and more



Hydrogen Fuel cell





ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

LCV Fleet

In %

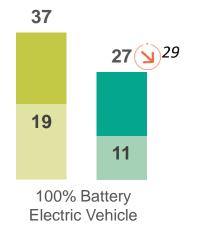


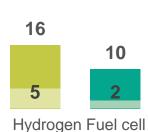










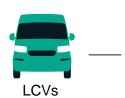


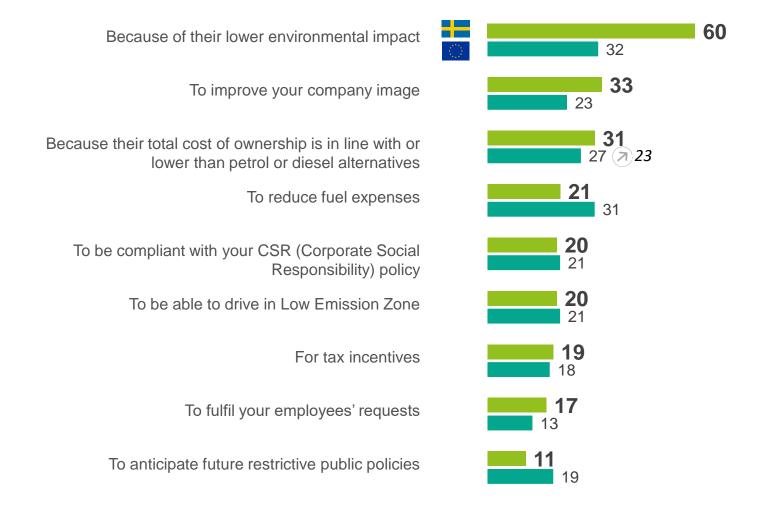


REASONS FOR IMPLEMENTING OR CONSIDERING ALTERNATIVE FUEL TECHNOLOGIES

LCV fleet

ln %





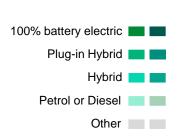


Why have you already implemented or why do you consider implementing alternative fuel technologies? Basis: companies having implemented or considering 100% Battery Electric Vehicle or Hydrogen Fuel Cell for LCVs

HOW TO READ THE RESULTS?

In Sweden in 3 years, 40% of the companies passenger car fleet is expected to be 100% BEV









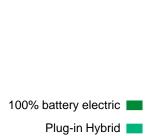
In your opinion, what percentage of your passenger car fleet will be: 100% battery electric, Plug-in Hybrid, Hybrid, petrol or diesel vehicles in 3 years?

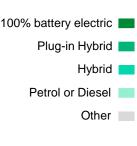
Basis: companies with passenger cars

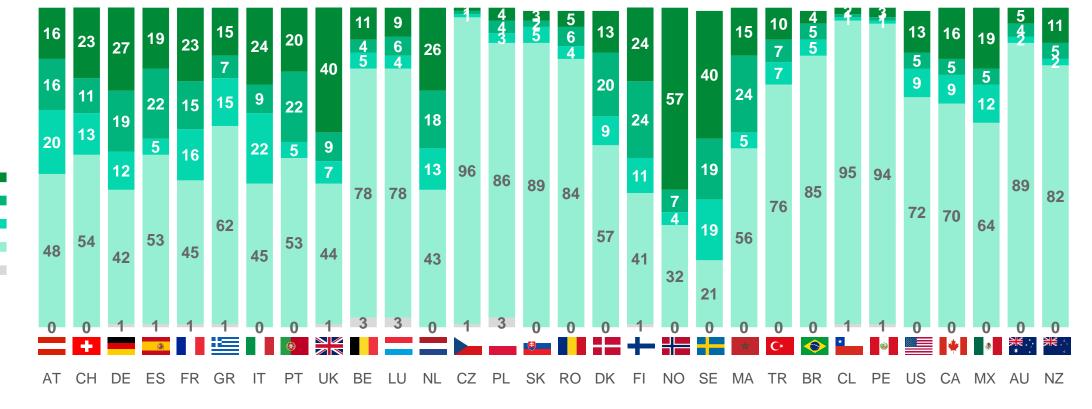
HOW TO READ THE RESULTS?

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





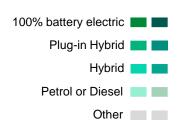






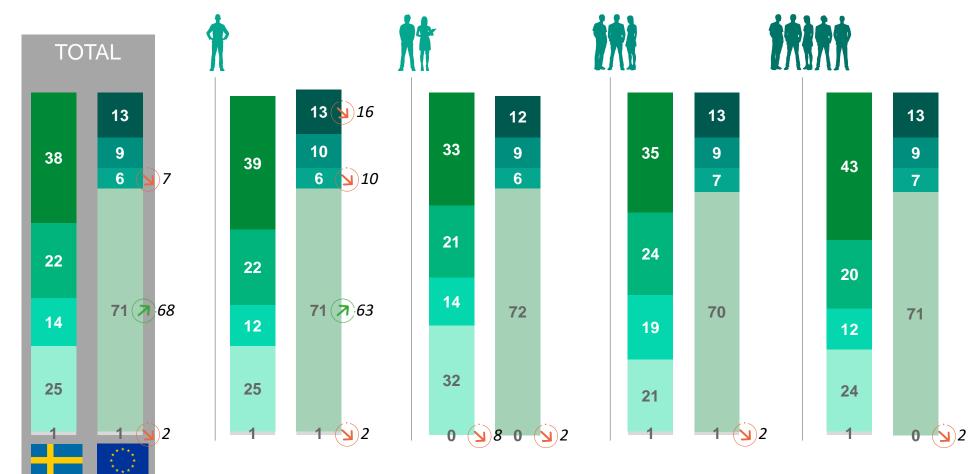
In %





HOW TO READ THE RESULTS?

In Sweden in 3 years, 38% of the light commercial vehicle fleet is expected to be 100% BEV.







HOW TO READ THE RESULTS?

In Sweden in 3 years, 38% of the light commercial vehicle fleet is expected to be 100% BEV.

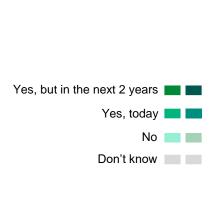


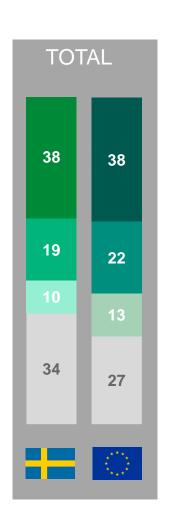


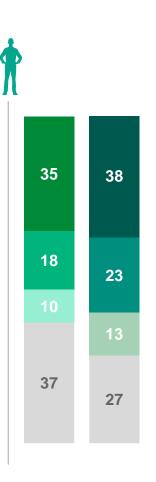


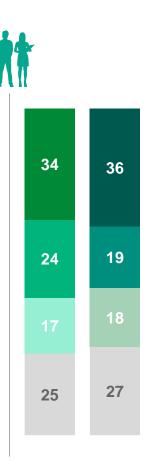
ELIGIBILITY TO ESG REGULATORY PUBLIC REPORTING

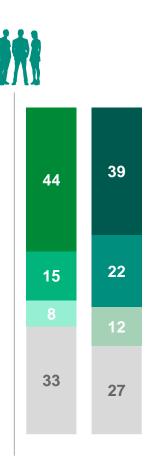
ln %

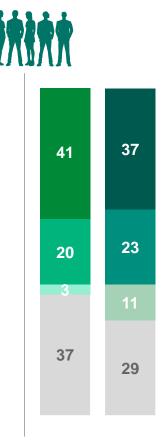












New question added in 2024

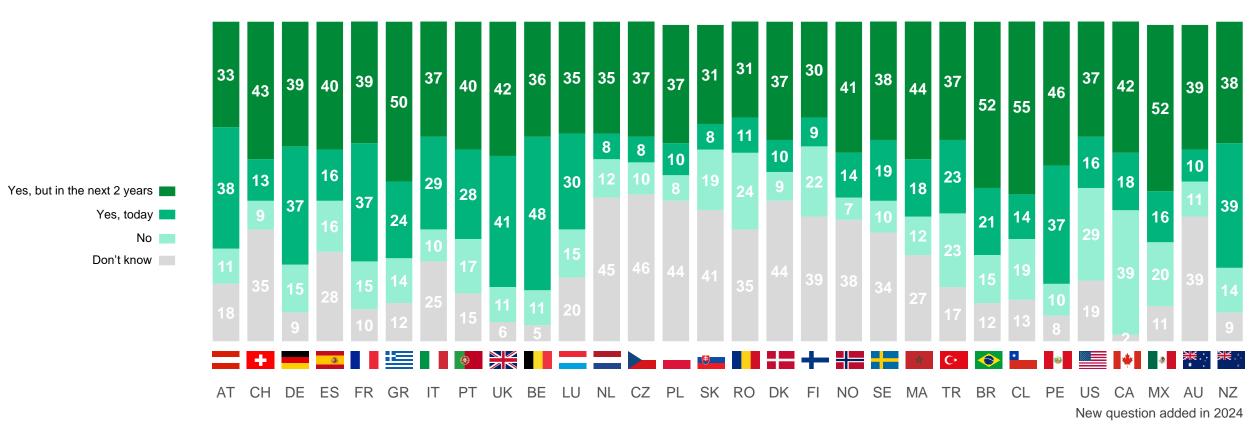
Is your company eligible to any ESG regulatory public reporting today or in the next 2 years?

Basis: companies with corporate vehicles = 100%



ELIGIBILITY TO ESG REGULATORY PUBLIC REPORTING

In %

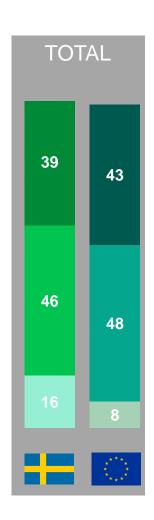






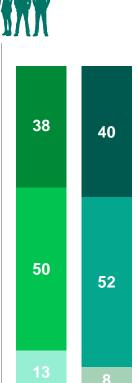
IMPORTANCE OF EMPLOYEES MOBILITY IN ESG REPORTING

ln %









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



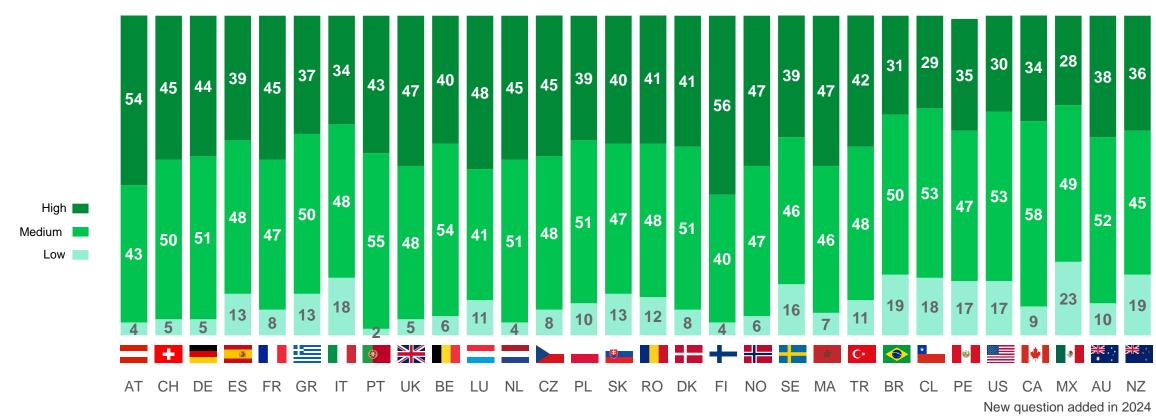
High 📉

Low

Medium

IMPORTANCE OF EMPLOYEES MOBILITY IN ESG REPORTING

In %







ENERGY MIX FOCUS PER ALTERNATIVE TECHNOLOGY

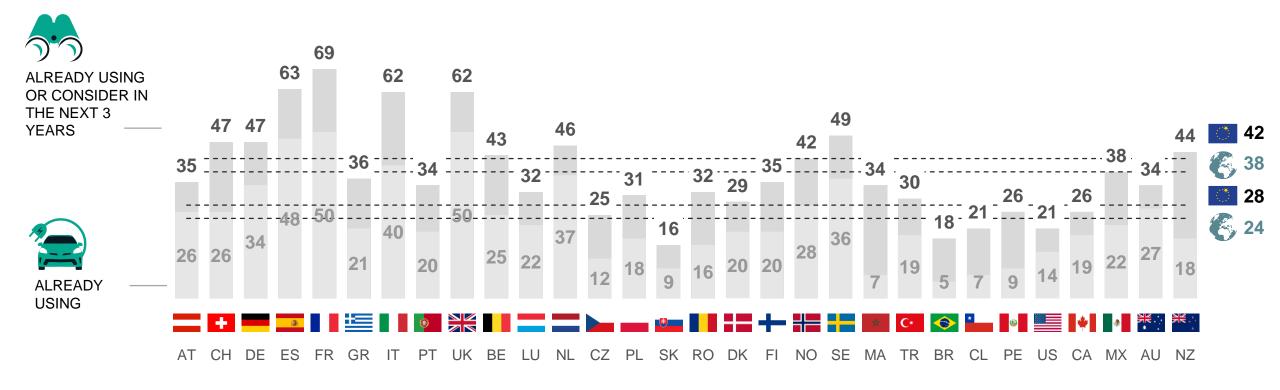


HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY





Passenger cars

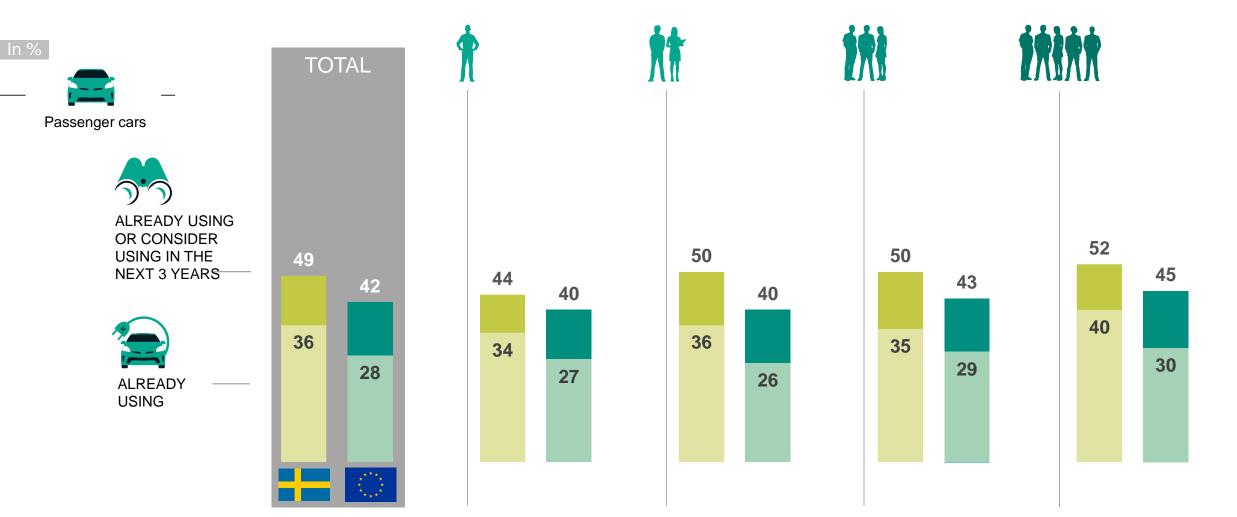




Amongst the following alternative fuel technologies, which ones do you currently use...?

Amongst the following alternative fuel technologies, which ones are you considering using...?

HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY





Amongst the following alternative fuel technologies, which ones do you currently use...?

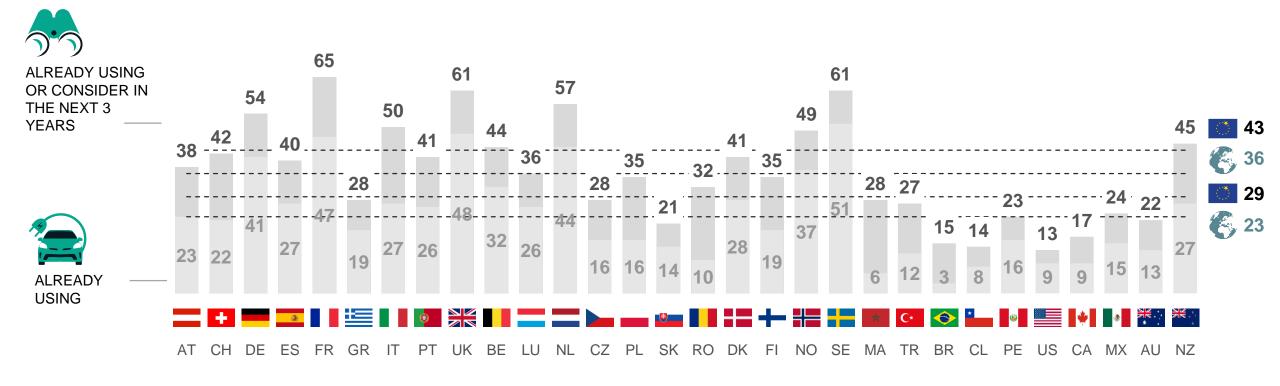
Amongst the following alternative fuel technologies, which ones are you considering using...?

PLUG-IN HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY



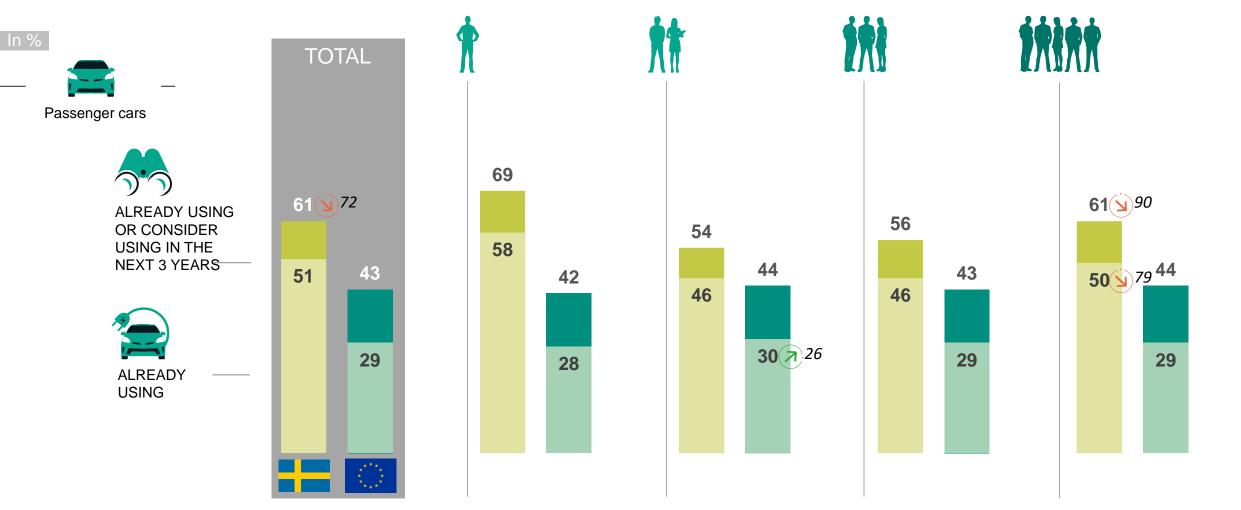


Passenger cars





PLUG-IN HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY





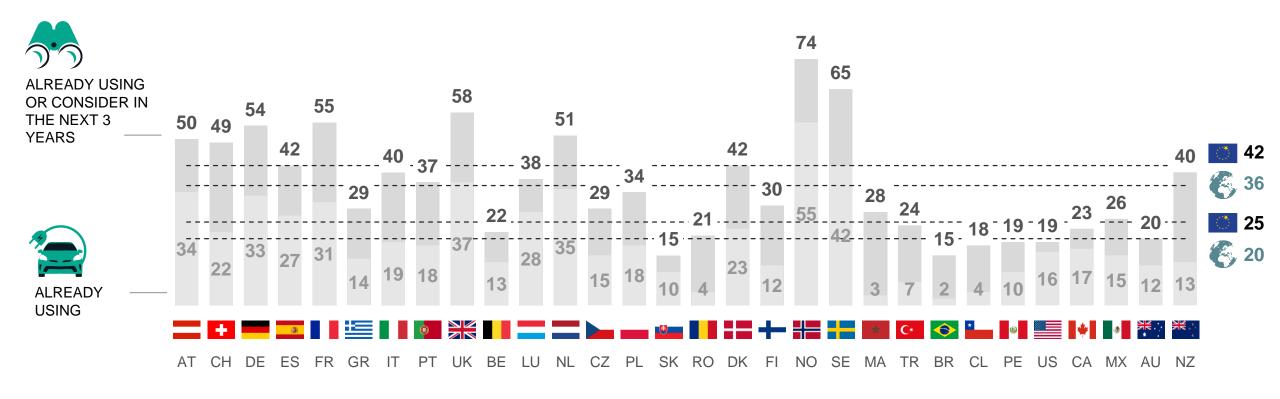
Amongst the following alternative fuel technologies, which ones do you currently use...?

Amongst the following alternative fuel technologies, which ones are you considering using...?

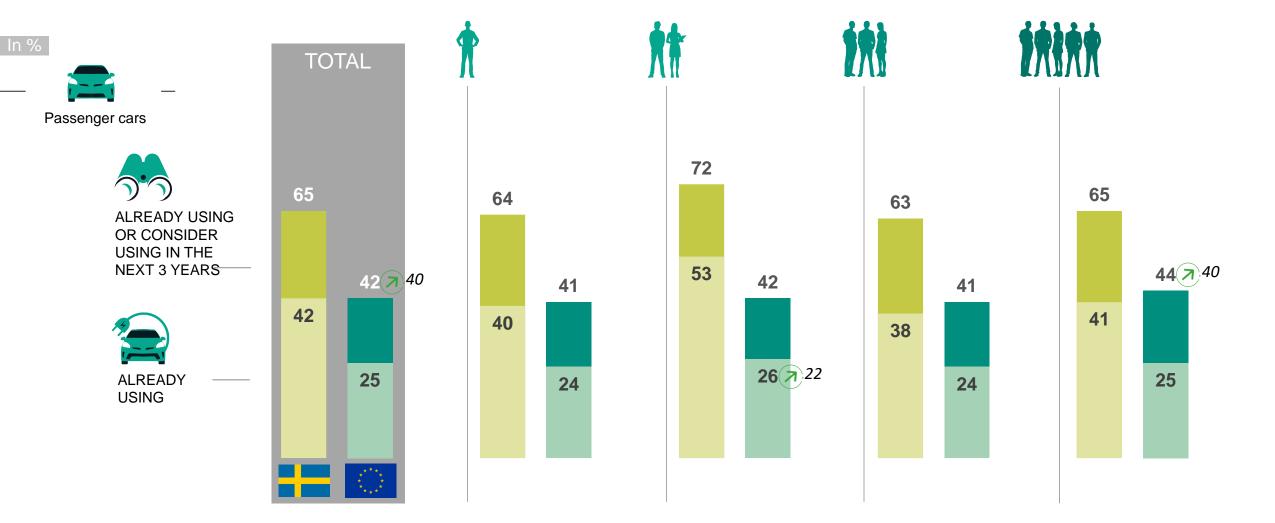




Passenger cars







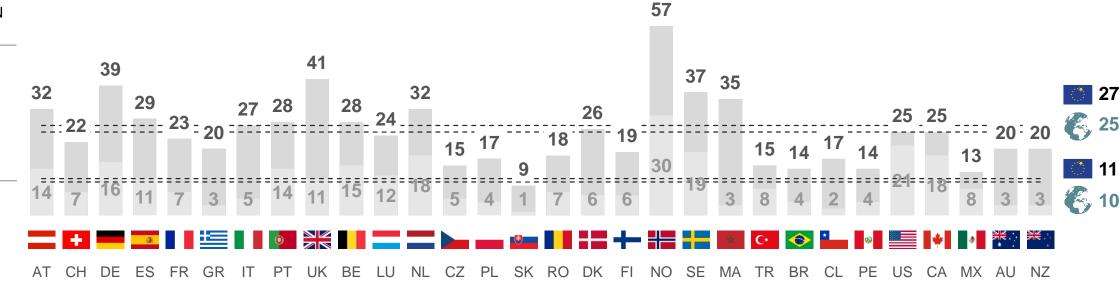


In %

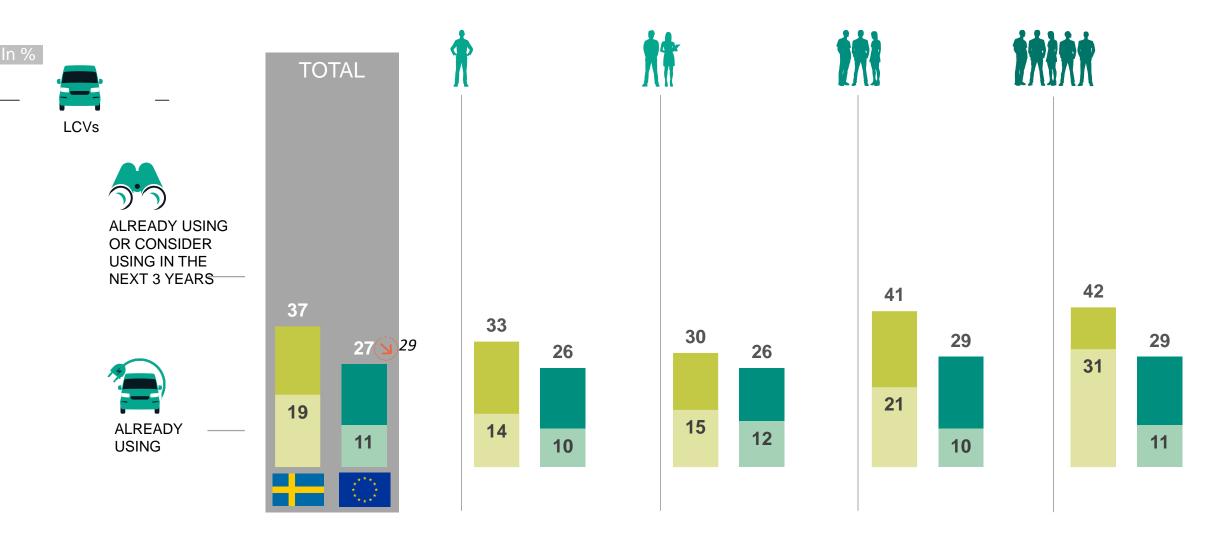














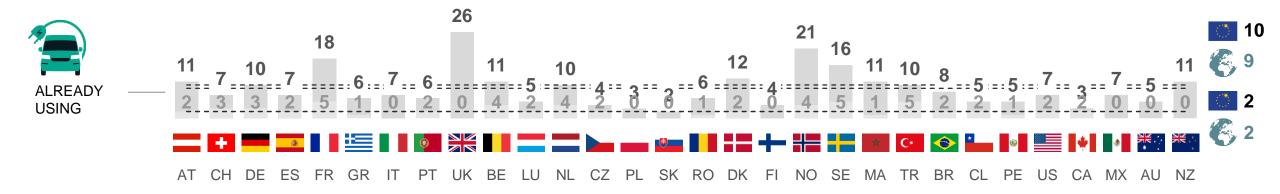
HYDROGEN FUEL CELL ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %



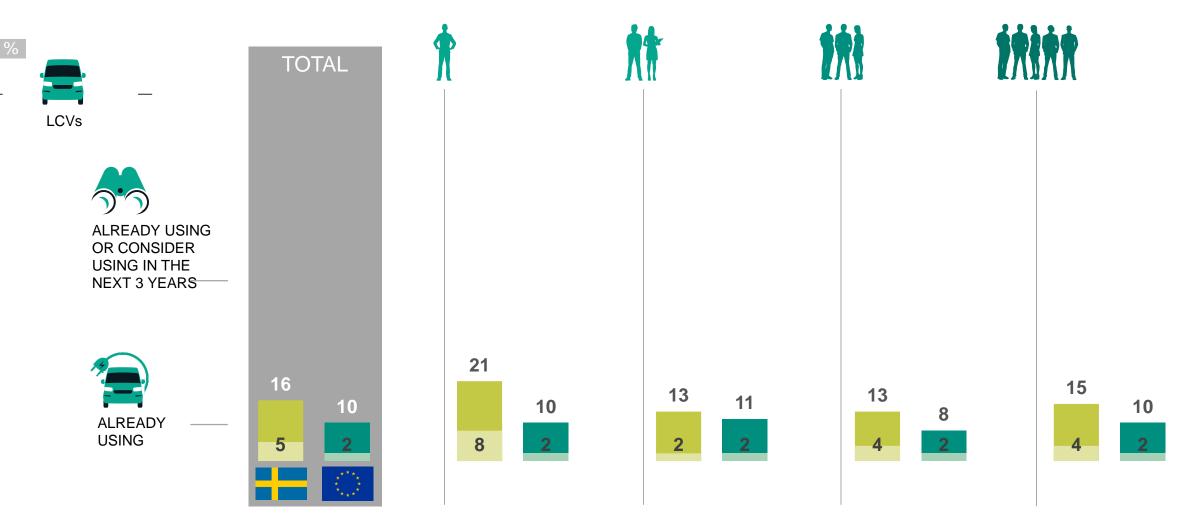








HYDROGEN FUEL CELL ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY





CONSTRAINTS OF 100% BATTERY ELECTRIC VEHICLE USAGE



Not enough public charging points

The range of models is limited for this type of vehicles

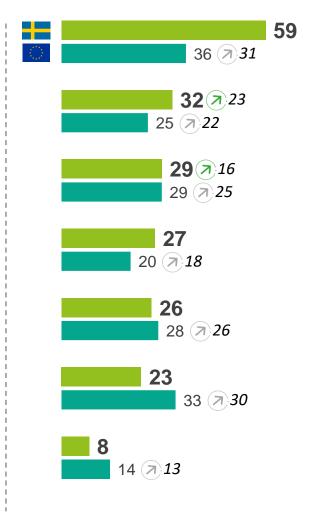
No charging solutions at your employees' home

The questions raised on their reliability

No charging points at your company offices

The purchase price is higher than a regular fuel car

Your employee's reluctance to drive electric vehicles

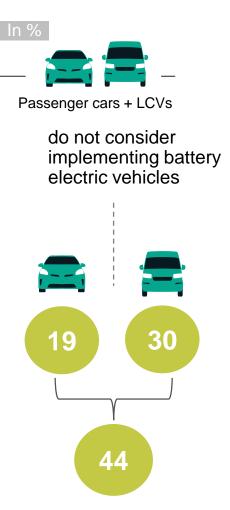




What are the constraints of using 100% Battery Electric vehicles?

Basis: Know 100% BEV technology

CONSTRAINTS OF 100% BATTERY ELECTRIC VEHICLE USAGE



Not enough public charging points

No charging points at your company offices

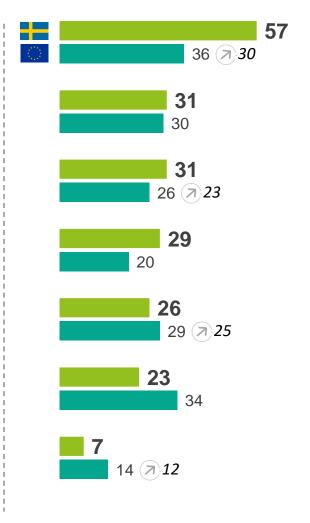
The range of models is limited for this type of vehicles

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Your employee's reluctance to drive electric vehicles

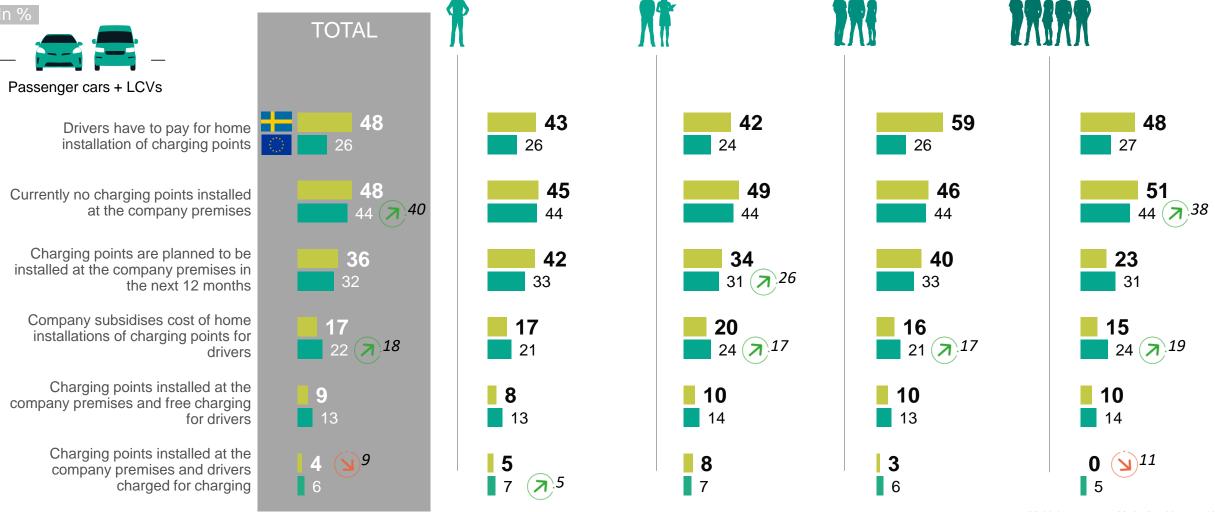




What are the constraints of using 100% Battery Electric vehicles?

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

WHAT ARE THE PERSPECTIVES IN TERMS OF MOBILITY SOLUTIONS?



STILL A STRONG IMPLEMENTATION OF MOBILITY SOLUTIONS IN SWEDEN

Swedish companies continue developing mobility solutions implementation in 2024, with a rising 85% already using at least one solution (vs 76% in 2023, also rising in Europe), and 95% using or considering them in the next 3 years. Mobility solutions are slightly less implemented among medium-small companies (10-99 employees): 76% adopted of at least one solution versus 85% to 89% in larger businesses, and 87% among the smallest companies. Over two years, implementation and consideration rose significantly for all business sizes. As in 2023, ride sharing shows the highest potential (37% already use or consider implementing it over the next three years, including 50% among the largest companies), followed by bike/two wheels sharing (34%) and short or mid-term rentals (32%, including 49% among the largest companies). In addition, among small companies, corporate car sharing and private lease are well-considered, while bigger businesses also highly favour public transport. The largest companies (250+ employees) clearly prefer short or mid-term rentals. One in five Swedish companies have a mobility plan in 2024, stable overall vs 2023 (27%), but declining among the largest companies (14% vs 38% last year). In continuity to 2023, these mobility solutions are seen as **complementary to existing systems**, and not as a substitute for all or part of the current fleets.



MOBILITY SOLUTIONS







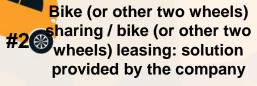
18%

19%



TOP 3 POTENTIAL NEXT 3 YEARS

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



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











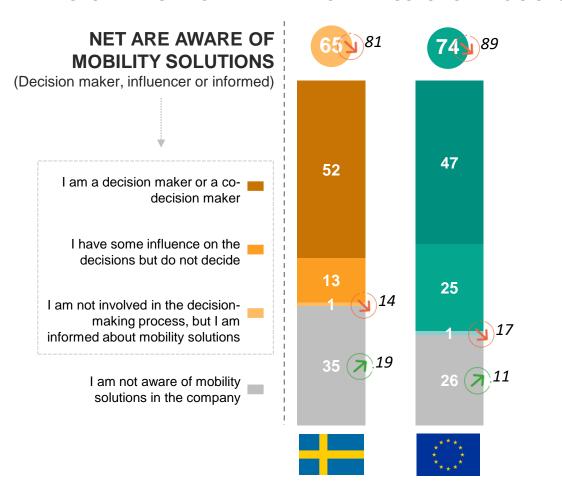
for an employee

Public transport

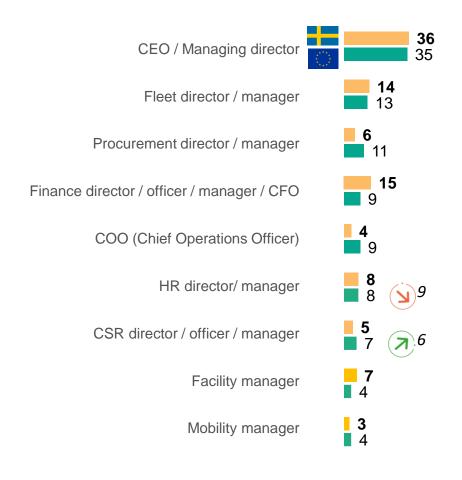
#3

MOBILITY SOLUTION DECISION MAKERS

RESPONDENTS INVOLVEMENT IN MOBILITY SOLUTION DECISIONS

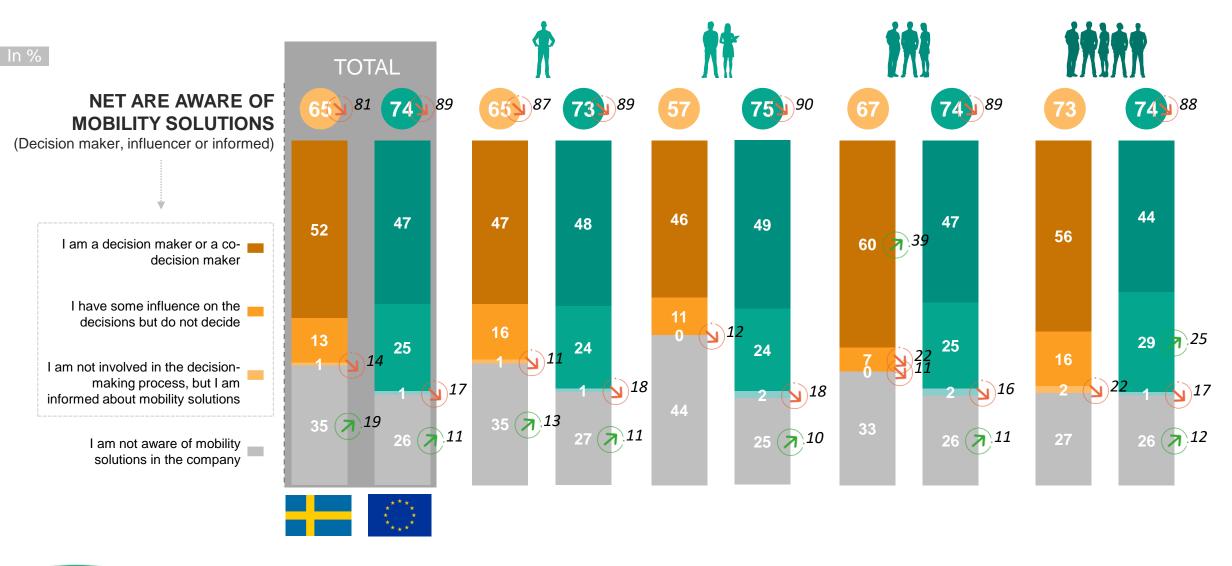


POSITION OF THE PERSON WHO DECIDES ON MOBILITY SOLUTIONS



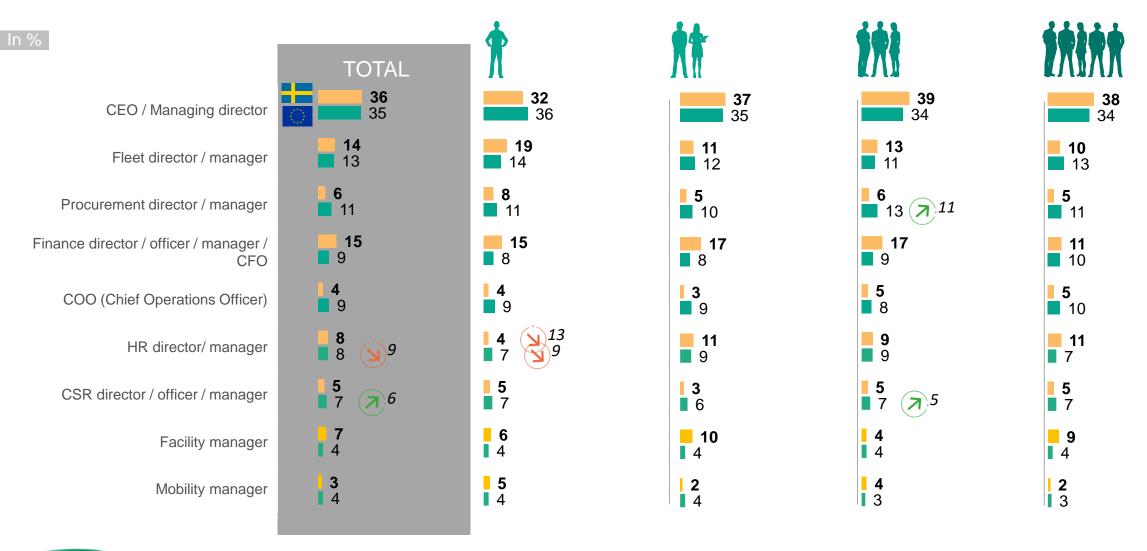


RESPONDENTS INVOLVEMENT IN MOBILITY SOLUTION DECISIONS





POSITION OF THE PERSON WHO DECIDES ON MOBILITY SOLUTIONS





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 PROVIDED BY THE COMPANY TO BOOK MOBILITY SOLUTIONS



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



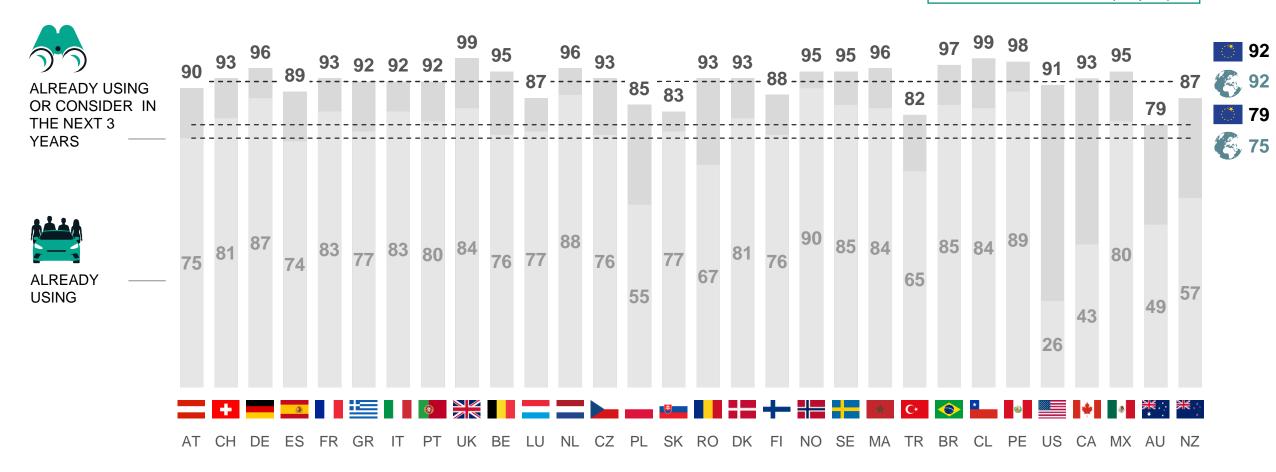
MOBILITY SOLUTIONS IMPLEMENTATION

At least one already implemented

In %

List of the alternative mobility solutions:

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





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%

MOBILITY SOLUTIONS IMPLEMENTATION

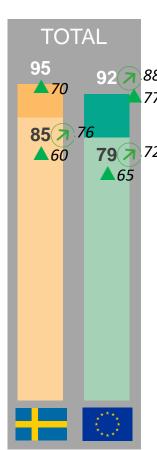
At least one already implemented

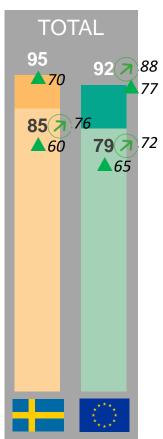
In %



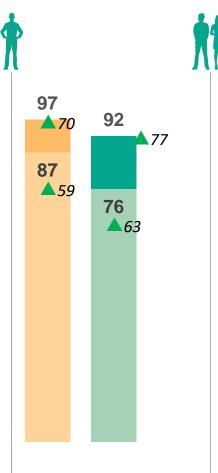


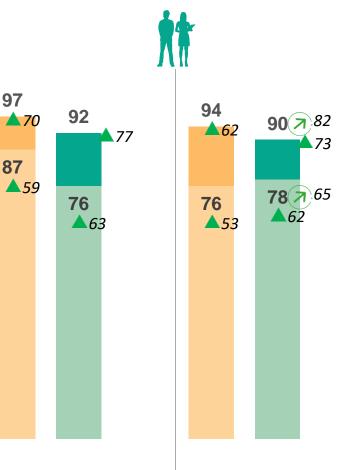
ALREADY USING

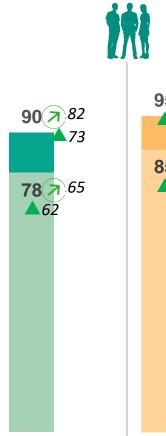


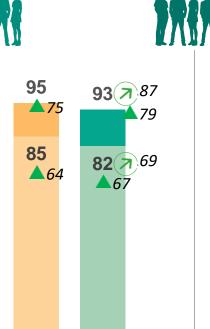


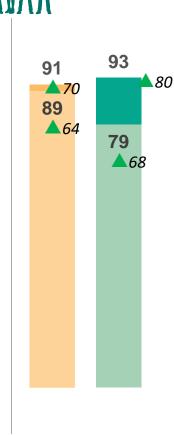














Significantly higher than 2023 year



Significantly higher than 2022 year



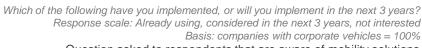


Significantly lower than 2023 year



Significantly lower than 2022 year

XX = score 2023 or 2022

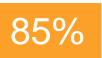


Question asked to respondents that are aware of mobility solutions 107



OVERVIEW OF MOBILITY SOLUTIONS IMPLEMENTATION

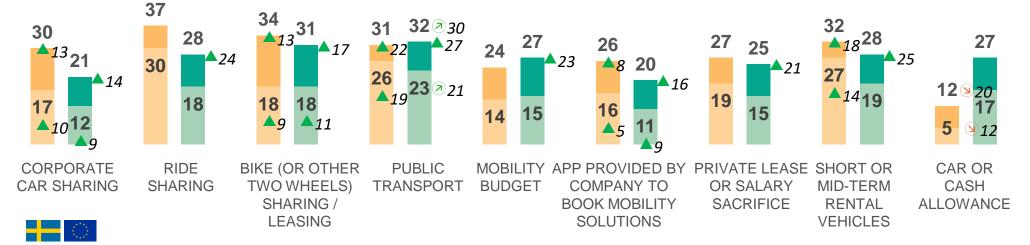




Of companies have already implemented at least one of these solutions









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%

OVERVIEW OF MOBILITY SOLUTIONS IMPLEMENTATION

Focus on 1 to 99

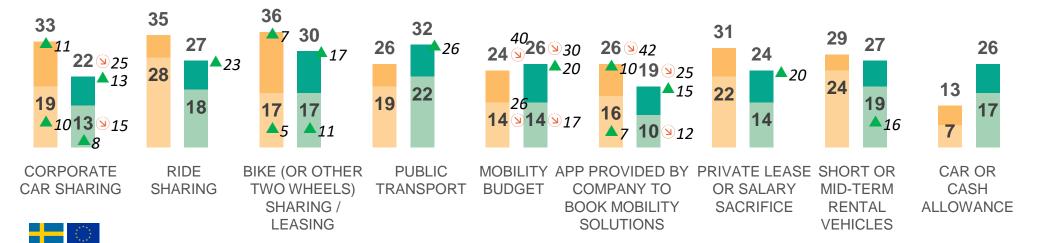


Of companies have already implemented at least one of these solutions











OVERVIEW OF MOBILITY SOLUTIONS IMPLEMENTATION

Focus on 100 and more

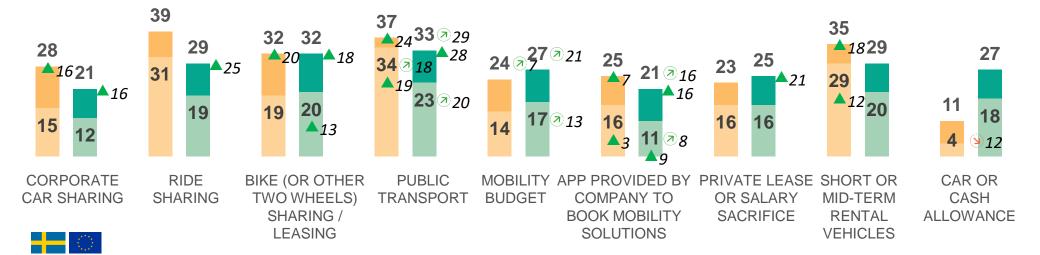


Of companies have already implemented at least one of these solutions







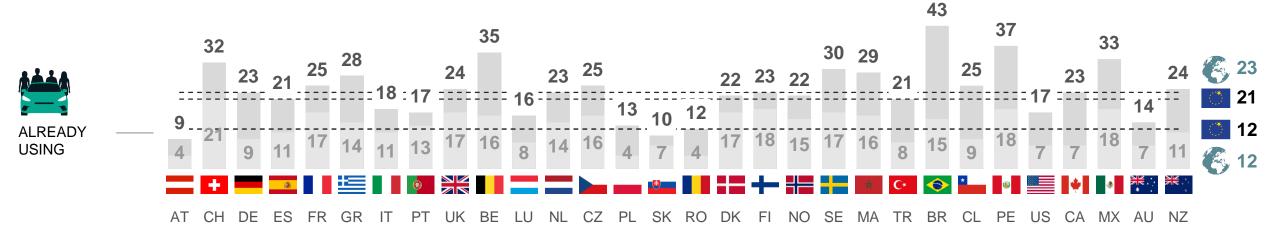




CORPORATE CAR SHARING IMPLEMENTATION

In %

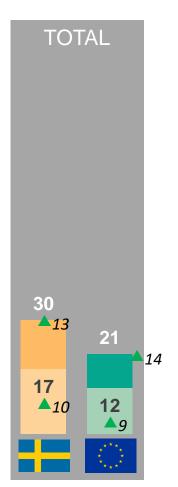




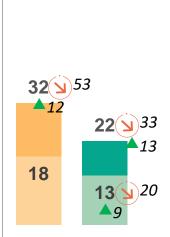


CORPORATE CAR SHARING IMPLEMENTATION





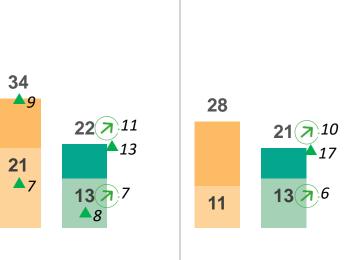


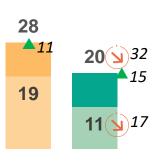












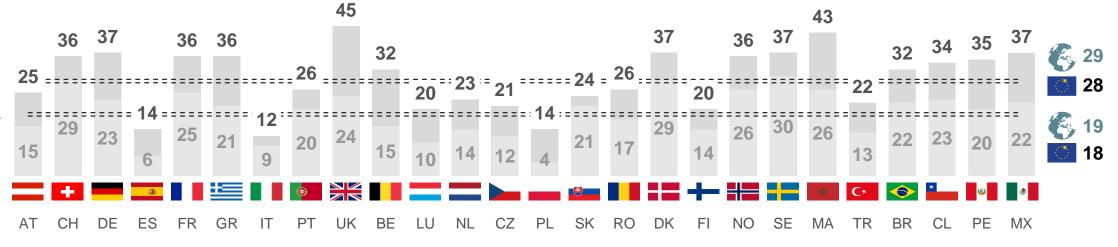


RIDE SHARING IMPLEMENTATION

In %









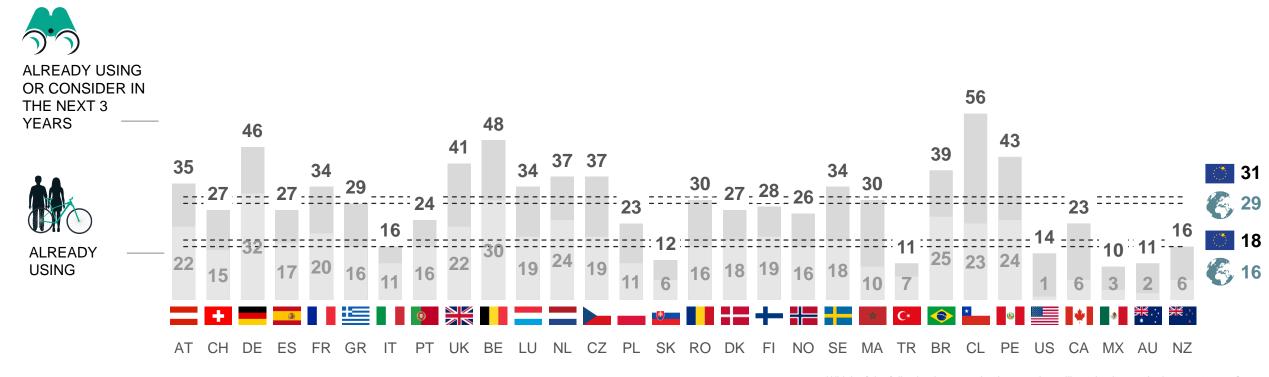
RIDE SHARING IMPLEMENTATION

TOTAL **ALREADY USING** OR CONSIDER IN THE NEXT 3 YEARS **50** 46 37 32 40 38 29 29 **28** 31 28 26 7 22 **^**26 26 **▲**23 24 30 ALREADY 24 23 21 **USING** 18 21 18 18 17



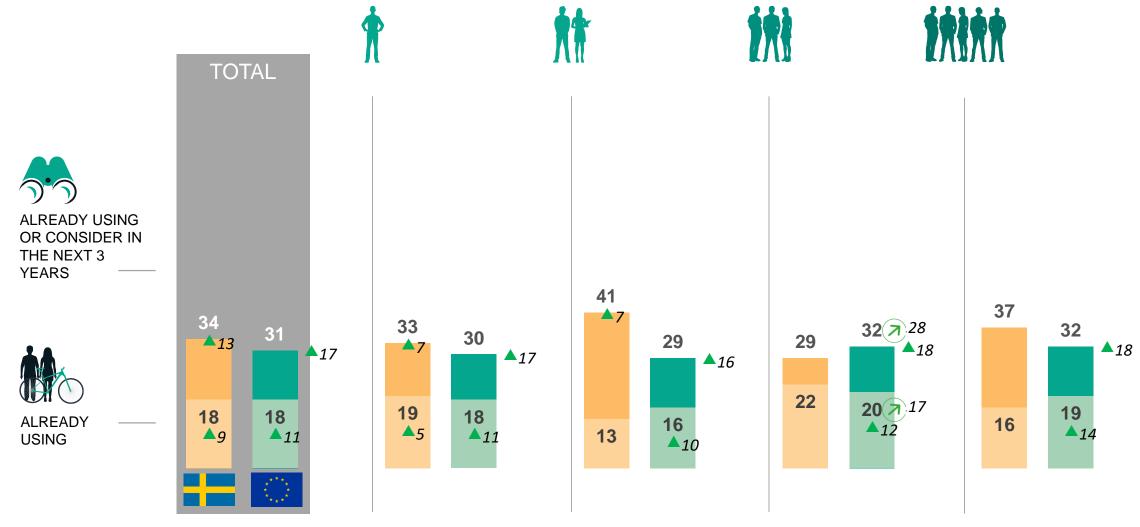
BIKE (OR OTHER TWO WHEELS) SHARING / LEASING IMPLEMENTATION

In %



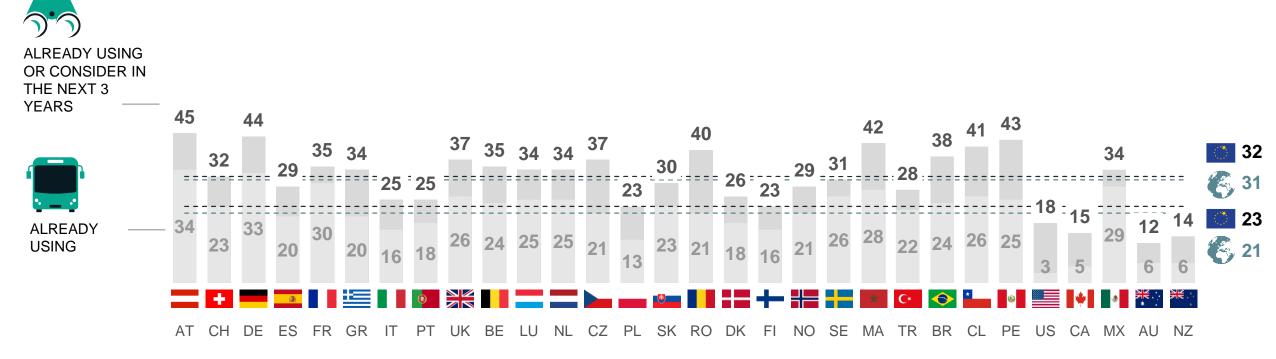


BIKE (OR OTHER TWO WHEELS) SHARING / LEASING IMPLEMENTATION





PUBLIC TRANSPORT IMPLEMENTATION

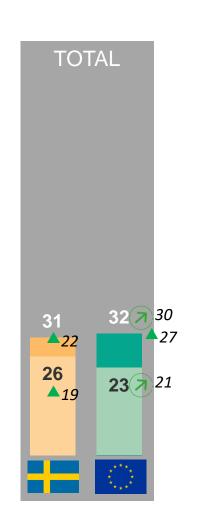


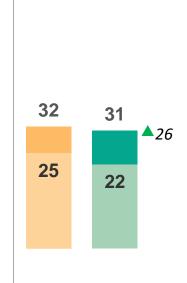


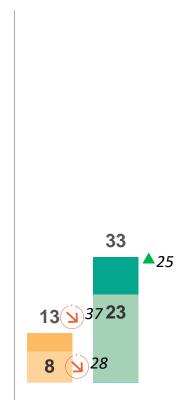
PUBLIC TRANSPORT IMPLEMENTATION

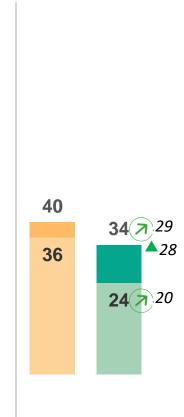
n %

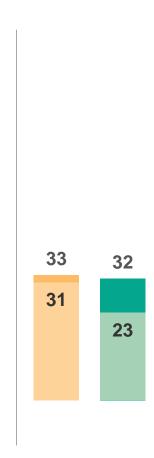








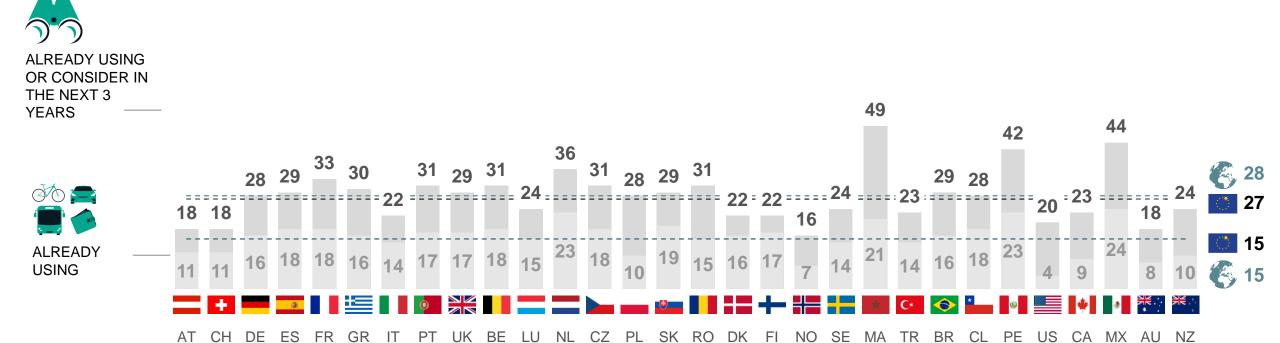






MOBILITY BUDGET IMPLEMENTATION

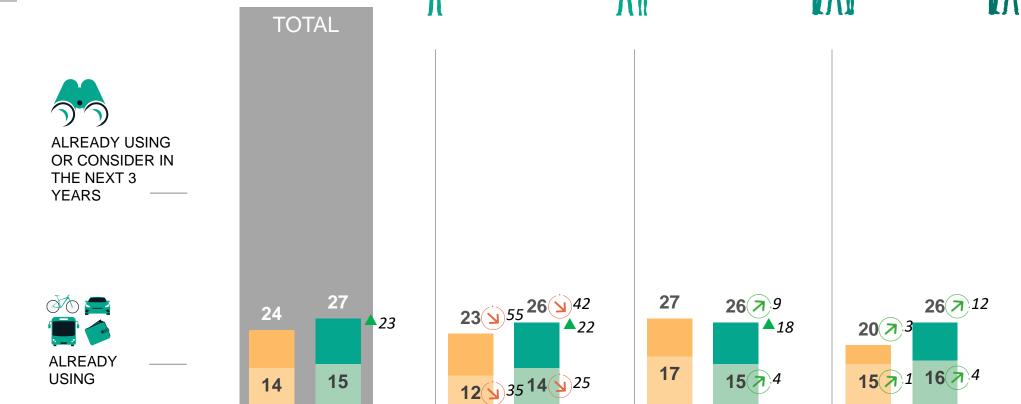
In %





MOBILITY BUDGET IMPLEMENTATION

n %





29 7 11 29

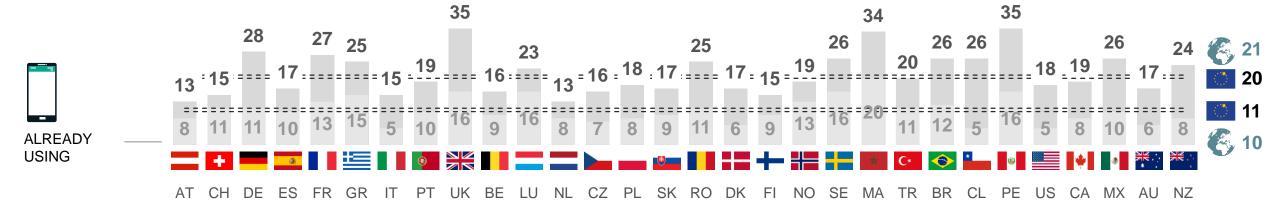
12

17 25

AN APP PROVIDED BY THE COMPANY TO BOOK MOBILITY SOLUTIONS

ln %







AN APP PROVIDED BY THE COMPANY TO BOOK MOBILITY SOLUTIONS

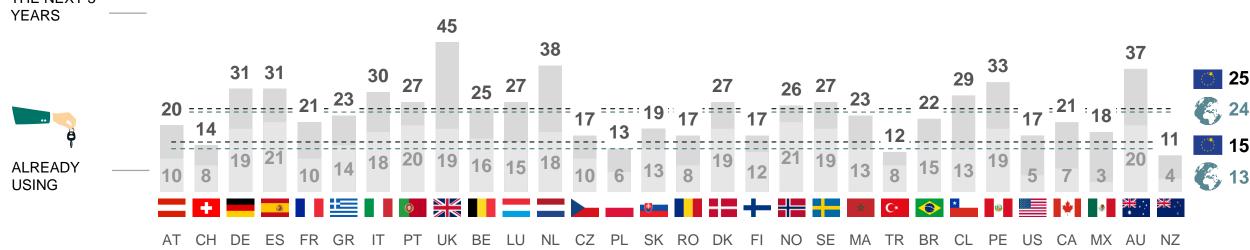
TOTAL **ALREADY USING** OR CONSIDER IN THE NEXT 3 **YEARS** 29 56 27 7 8 26 **1**3 23 21 7 8 **A**8 **20 3** 26 20 20 **19 3** *3 6* 1976 **A**7 **1**6 **1**6 **1**6 17 16 🔰 33 16 **ALREADY** 15 14 **_**5 12 7 3 16 **USING A**3 **1**



PRIVATE LEASE OR SALARY SACRIFICE IMPLEMENTATION

In %

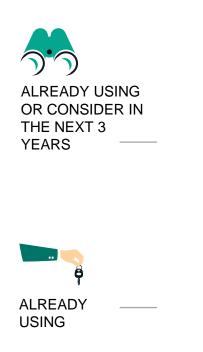


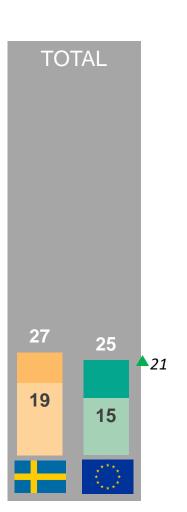


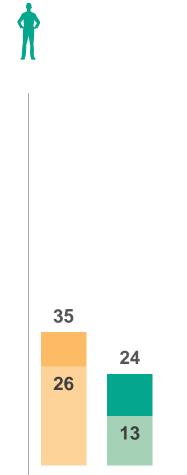


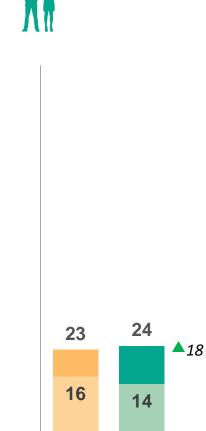
PRIVATE LEASE OR SALARY SACRIFICE IMPLEMENTATION

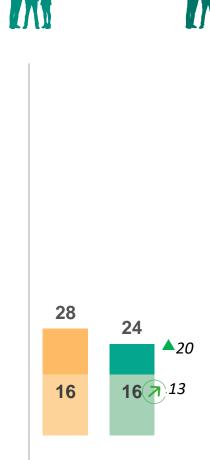
n %

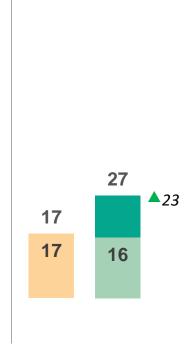








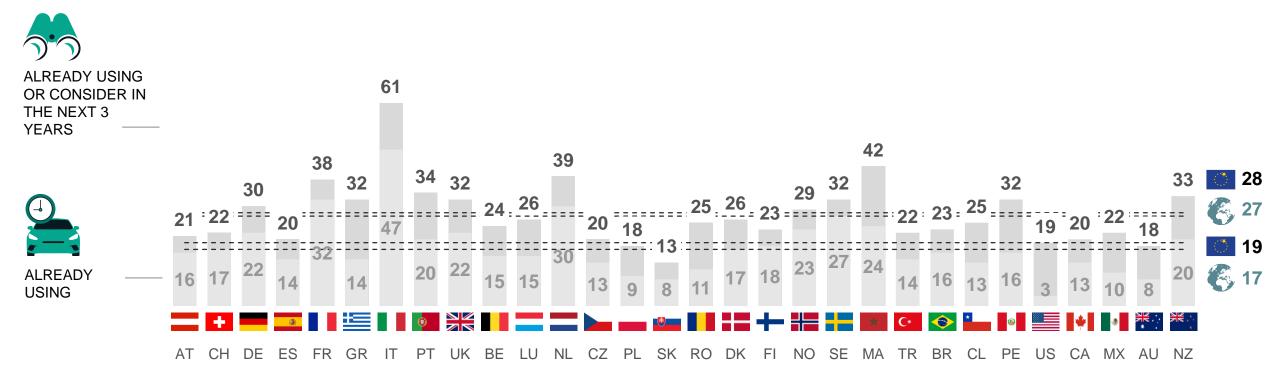






SHORT OR MID-TERM RENTAL VEHICLES IMPLEMENTATION

In %



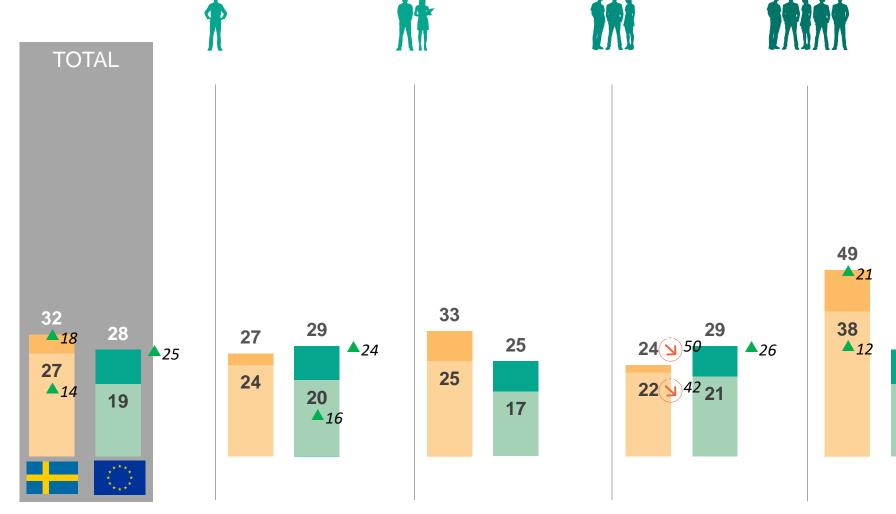


SHORT OR MID-TERM RENTAL VEHICLES IMPLEMENTATION

ln %







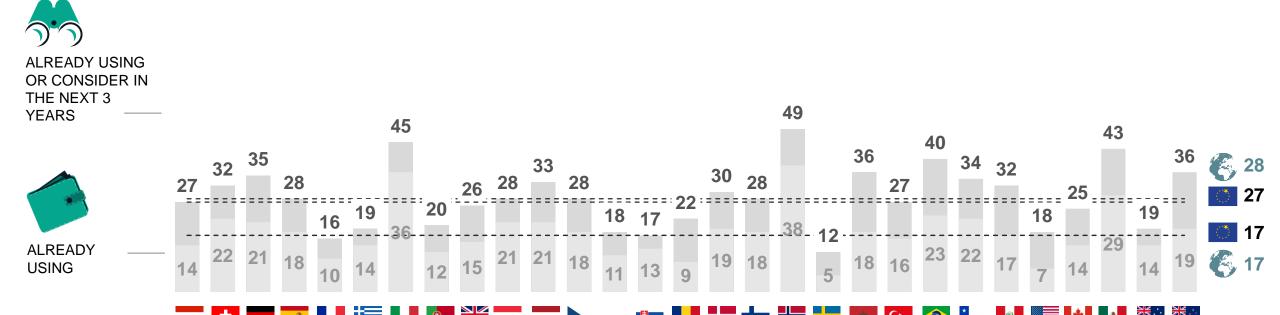


28

19

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%

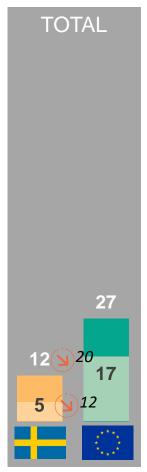
SE

CAR OR CASH ALLOWANCE IMPLEMENTATION

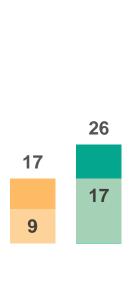
n %









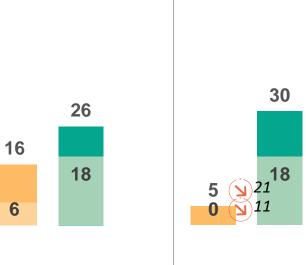














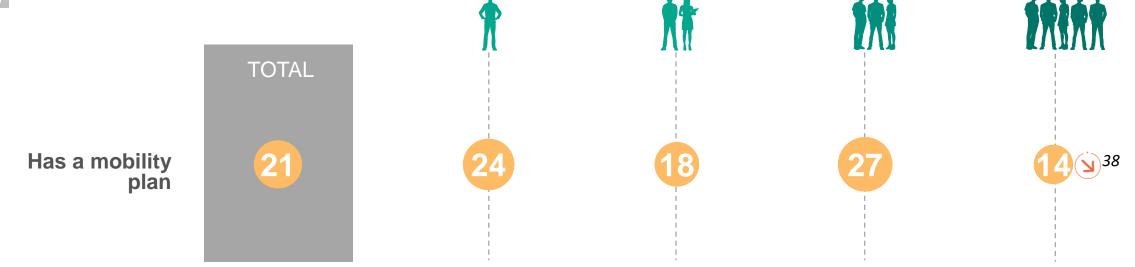
REASONS FOR IMPLEMENTING OR CONSIDERING MOBILITY SOLUTIONS

TOTAL 31 **52 7** 25 46 For reasons related to CSR (company 43 33 39 40 7.34 social responsibility) policies 39 Because of HR related needs like talent 40 33 39 7.25 40 7.29 39 30 recruitment, retaining employees etc. 19 31 25 25 To improve employer branding / 37 30 34 35 30 35 7 29 company attractiveness for employees **31** \nearrow 6 30 To anticipate upcoming regulations 30 7.24 31 7 24 29 31 7.23 12 27 7.21 Because of tax incentives 26 7.20 27 7 21 30 7 20 40 26 42 To answer specific requests of some 24 27 employees 27



MOBILITY PLAN IMPLEMENTATION

n %

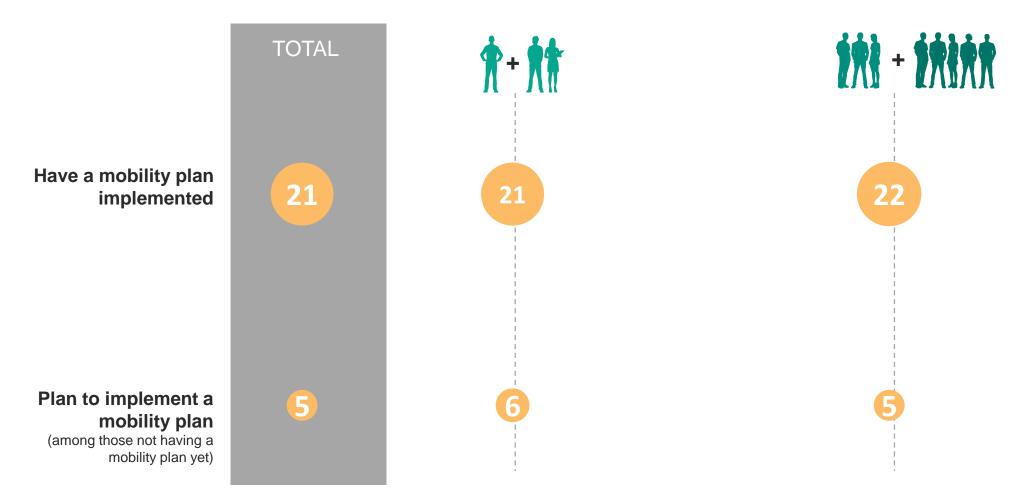


Does your company have a Mobility Plan?

Basis: mobility as a strategic factor



MOBILITY PLAN IMPLEMENTATION

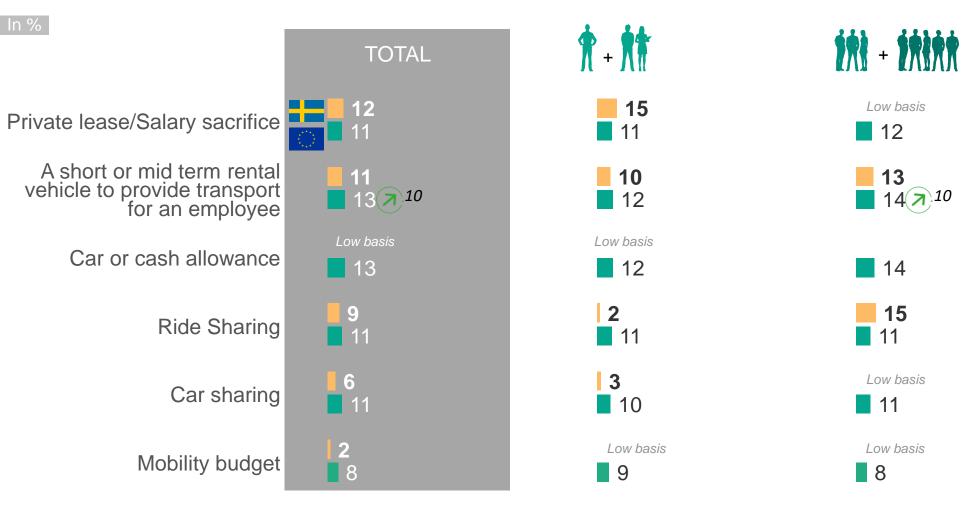




Does your company have a Mobility Plan? Basis: Mobility as a strategic factor Is it in your plans to have a mobility plan in the next 3 years?

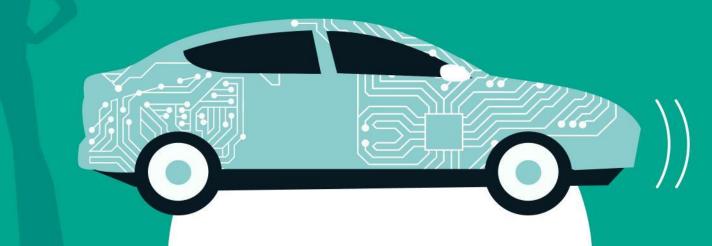
LIKELIHOOD TO GIVE UP ALL / PART OF THE FLEET FOR MOBILITY SOLUTIONS

Certainly

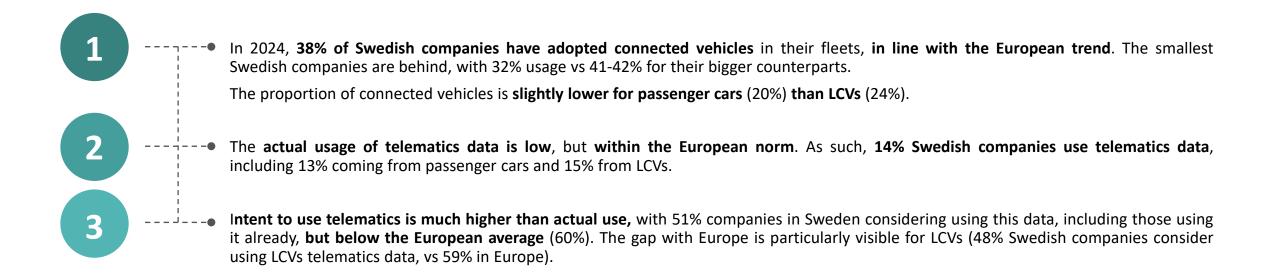




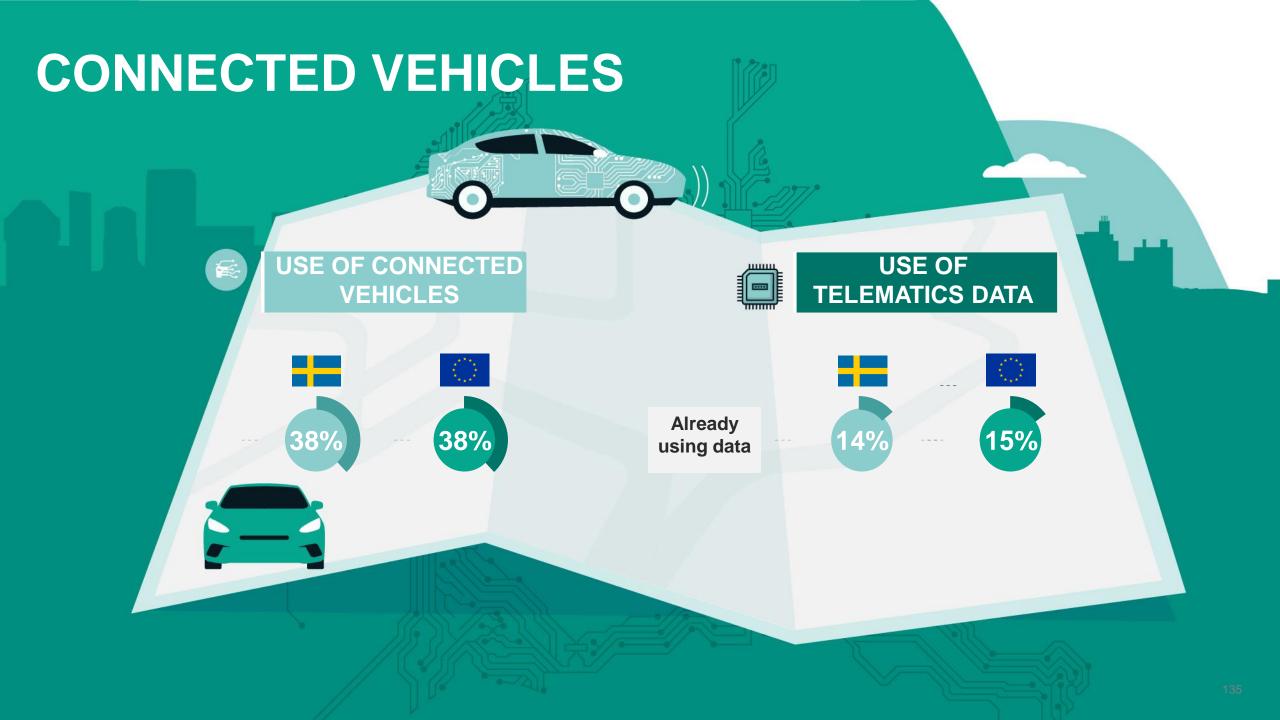
WHAT ARE THE USAGES IN TERMS OF CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY EQUIPMENTS?



INTEREST IN TELEMATICS IS MODERATE IN SWEDEN, AND THE TECHNOLOGY REMAINS UNDERUSED







PROPORTION OF COMPANIES USING CONNECTED VEHICLES

All vehicles

ln %

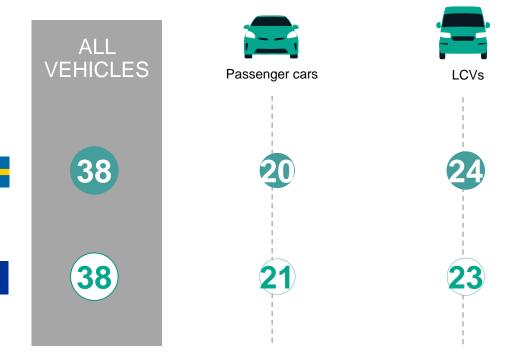


NET OF YES: YES, FOR ALL THE FLEET + YES, FOR PART OF THE FLEET

HOW TO READ THE RESULTS?

38% of companies with fleet using connected vehicles for all or part of their fleet.

20% use connected vehicles for passenger cars, while 24% use connected vehicles for LCVs.



Change of definition in 2024. No comparison with 2023

Is your fleet connected thanks to a telematic tool?

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

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



PROPORTION OF COMPANIES USING CONNECTED VEHICLES

All vehicles

In %



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



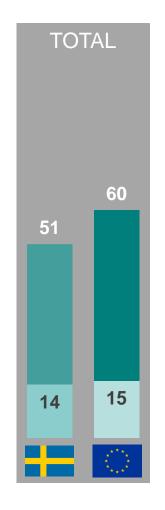
All vehicles



Passenger cars + LCVs









56

16

51

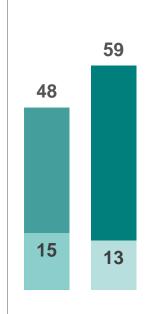
13





HOW TO READ THE RESULTS?

51% 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. 14% 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.



All vehicles

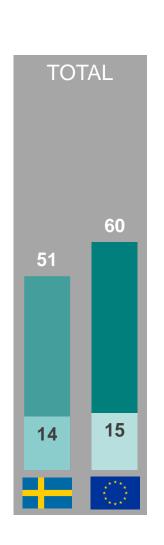
ln %

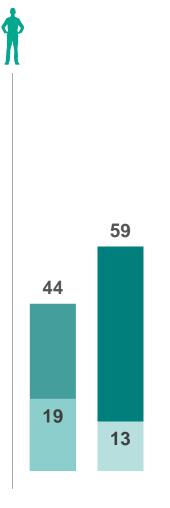


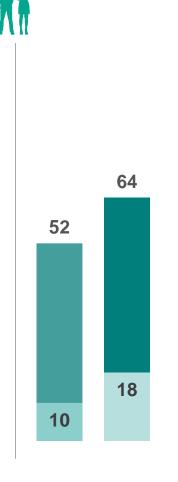
Passenger cars + LCVs

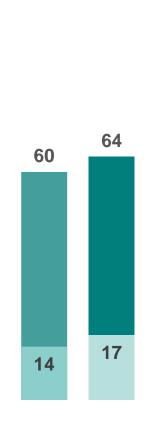


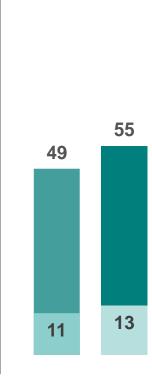












New question added in 2024

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.

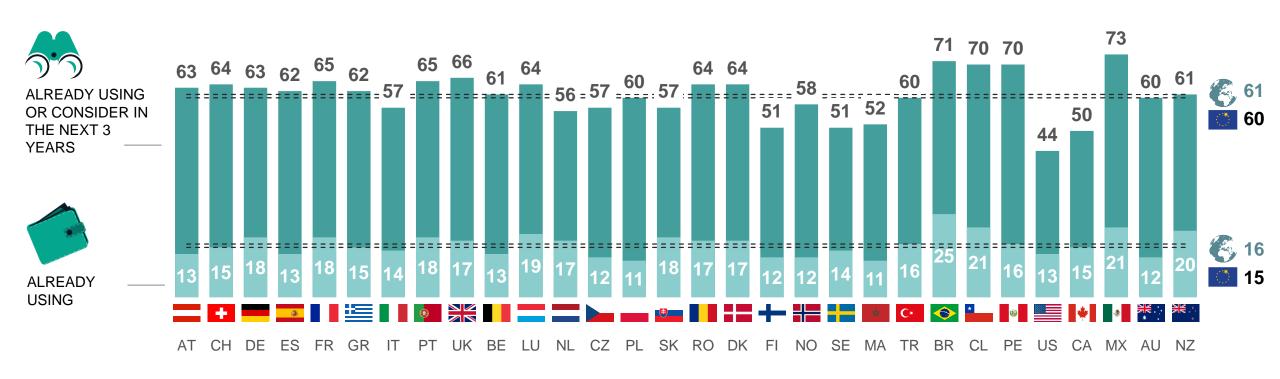


All vehicles

In %



Passenger cars + LCVs



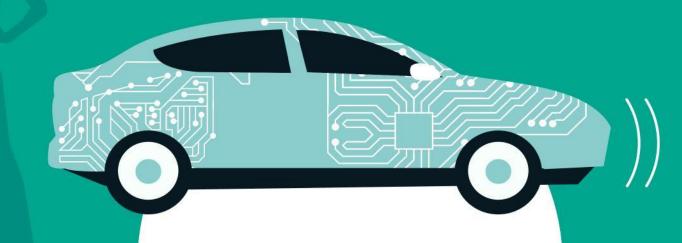
New question added in 2024

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.



CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY A. PASSENGER CARS



PROPORTION OF COMPANIES USING CONNECTED VEHICLES

Passenger cars

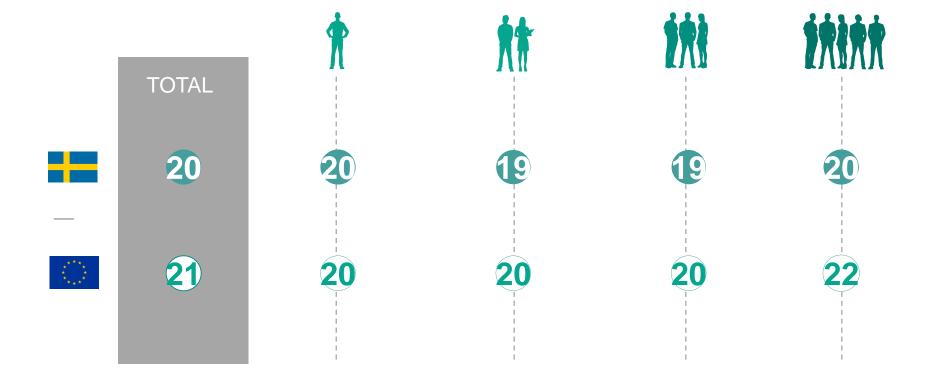
n %



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

HOW TO READ THE RESULTS?

20% 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

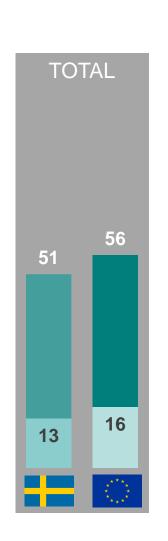
Passenger cars

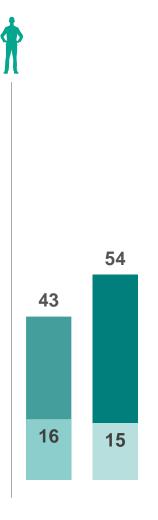
ln %

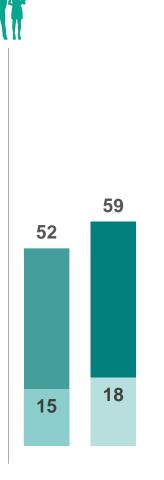


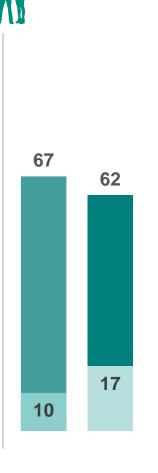


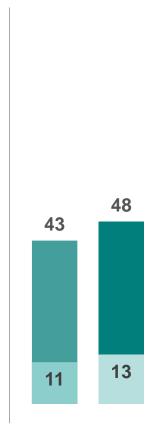












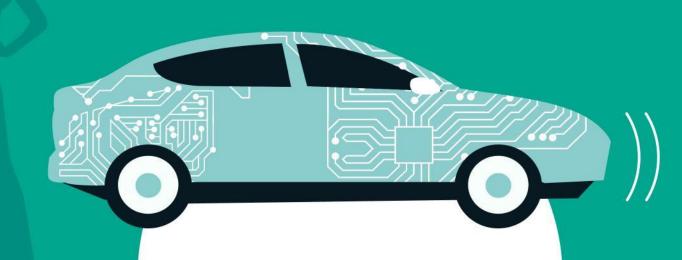
New question added in 2024

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.



CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY B. LCVs



PROPORTION OF COMPANIES USING CONNECTED VEHICLES

LCVs

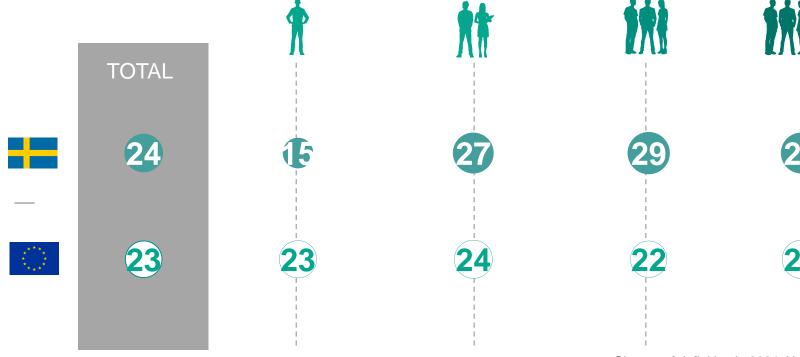
LCVs

n %

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

HOW TO READ THE RESULTS?

24% use connected vehicles for LCVs.



Change of definition in 2024. No comparison with 2023

Is your fleet connected thanks to a telematic tool?

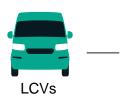
Telematics enables transmission of data to the fleet manager to monitor fuel consumption, driver behaviour, vehicle location, driver's impact on environment... from vehicles on the move. Data is transmitted by means of an original or after sales equipment or box installed in the vehicle. Telematics do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

Basis: companies with at least one LCV car in fleet



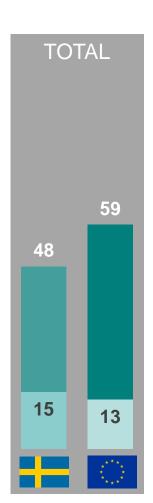
LCVs

n %

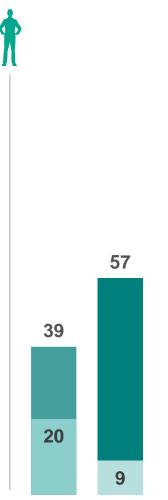


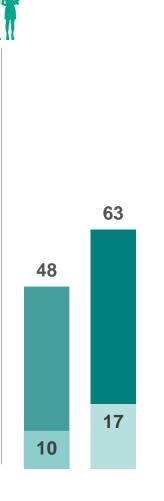


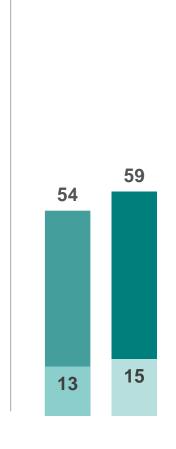


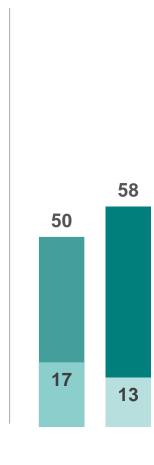












New question added in 2024

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.





Thank you

