# Table of content

<table>
<thead>
<tr>
<th>Section I</th>
<th>FLEET PROFILE</th>
<th>p.15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Section II</td>
<td>FINANCING</td>
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<td>p.70</td>
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<tr>
<td>Section IV</td>
<td>PERSPECTIVES IN TERMS OF CORPORATE MOBILITY</td>
<td>p.77</td>
</tr>
</tbody>
</table>
PERIMETER OF THE STUDY – FOCUS EUROPE
METHODOLOGY

**DATA COLLECTION METHOD**
CATI System (Computer Assisted Telephone Interviewing)

**FIELDWORK PERIOD**
JAN 15
FEB 6

**TARGET**
Fleet managers in companies of all industries using at least 1 corporate vehicle

**QUOTAS**
Company size & sector

**SAMPLE**
3 313 interviews through Europe

**DURATION OF INTERVIEW**
10 minutes on average
### SAMPLE FOR EUROPE

Perimeter of the survey: companies owning at least 1 vehicle

<table>
<thead>
<tr>
<th>Number of Employees</th>
<th>Number of Interviews</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 to 99 employees</td>
<td>1,770 interviews</td>
</tr>
<tr>
<td>100 employees and more</td>
<td>1,543 interviews</td>
</tr>
<tr>
<td>1,000 employees and more</td>
<td>660 interviews</td>
</tr>
</tbody>
</table>

**Companies with less than 10 employees**
- 1,093 interviews

**Companies with 10 to 99 employees**
- 677 interviews

**Companies with 100 to 249 / 499 / 999 employees**
- 883 interviews

**Companies with 250 / 500 / 1,000 employees and more**
- 660 interviews
<table>
<thead>
<tr>
<th>Company size &amp; sector</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Construction</td>
<td>211 (19%)</td>
<td>113 (17%)</td>
<td>90 (10%)</td>
<td>42 (6%)</td>
<td>456 (14%)</td>
</tr>
<tr>
<td>Industry</td>
<td>196 (18%)</td>
<td>218 (33%)</td>
<td>361 (41%)</td>
<td>244 (37%)</td>
<td>1 018 (31%)</td>
</tr>
<tr>
<td>Services</td>
<td>418 (38%)</td>
<td>194 (29%)</td>
<td>268 (31%)</td>
<td>269 (41%)</td>
<td>1 148 (35%)</td>
</tr>
<tr>
<td>Trade</td>
<td>274 (25%)</td>
<td>142 (21%)</td>
<td>157 (18%)</td>
<td>104 (16%)</td>
<td>677 (21%)</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>1 093 (100%)</strong></td>
<td><strong>677 (100%)</strong></td>
<td><strong>883 (100%)</strong></td>
<td><strong>660 (100%)</strong></td>
<td><strong>3 313 (100%)</strong></td>
</tr>
</tbody>
</table>

Weight of each company size segment:

- 33%
- 20%
- 27%
- 20%
- 100%

This sample structure was set up in order to be roughly representative of the number of cars registered by companies for each company size segment and activity sector as well as to allow comparisons between countries on a similar bases. In the following slides, no additional weighting of the data are applied to company sizes or activity sectors segments.
<table>
<thead>
<tr>
<th>Employee Size</th>
<th>FR</th>
<th>IT</th>
<th>UK</th>
<th>NL</th>
<th>ES</th>
<th>BE</th>
<th>CZ</th>
<th>DE</th>
<th>PL</th>
<th>PT</th>
<th>CH</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 10 employees</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10 to 99 employees</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
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<td>100 to 249 employees</td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>100 to 499 employees</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>100 to 999 employees</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>250 employees and more</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>500 employees and more</td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1000 employees and more</td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Company size

- Less than 10 employees
- 10 – 99 employees
- 100 to 249 / 499 / 999 employees
- 250 / 500 / 1000 employees and more

Fleet size*

- 1 – 9 vehicles
- 10 – 49 vehicles
- 50 vehicles and more

* Fleet size: the size of the fleet has been defined according to the total number of vehicles given in question A5.
MAIN RESULTS
Companies are embracing the shift to new powertrain technologies. The adoption of alternative energies will accelerate among large and very large companies but also small and medium-sized companies which are now considering this as well.

The aforementioned evolution will impact the companies’ uses and attitudes in terms of mobility services. The introduction of Car Sharing and Ride Sharing as a service has entered into the daily business life.

A redefinition of the mobility needs in which the fleet vehicle will remain a central tool. At a glance, the business sees the future of fleet as bright and the companies confidence is strong an growth of their fleets size.

Operational leasing remains the preferred solution to support the development of fleets of large and very large companies but is also increasingly considered by the SME segment.
In the current transition period with the incoming of WLTP, key themes and points of interest of this year are growth expectations for alternative vehicles and alternative mobility services in the broader sense.

If yesterday almost all fleet vehicles were running on diesel, this 2018 survey shows that the landscape is changing: 30% of very large companies have already switched to electric vehicles and 27% to hybrids. Large and very large companies also say that they want to accelerate the movement in the coming years ... small and medium-sized companies will not be left out since they plan to follow the movement, as evidenced by the following figures:
- respectively 68% and 48% of very large and large companies have already or plan to integrate in their live fleets alternative energies (HEV, PHEV, BEV, CNG, LPG or Hydrogen)
- this value remains high even among small businesses since this concerns 32% of them.

The leading countries to implement such changes are Belgium, UK, the Netherlands and Switzerland.

More and more car policies are opened to alternative energies now that the TCO of those is closing in on combustion engine based models. This is facilitated by local government’s fiscal policies, but also because lessors are more confident than before about residual values of particularly the batteries powering full electric vehicles, as well as their remaining capacity after a first full cycle of experience. The key remaining points of attention of battery powered alternatives are the charging infrastructure and having enough comfort about their true range in varying circumstances.
MAIN RESULTS

Lessors are helping their clients to make the right strategic and tactical choices for future powertrain choices during this challenging transitional period, during which OEMs need to adapt their models to ever more challenging European norms around CO₂ and NOx emissions. Corporates are also more and more conscious of their direct impact on the environment in the broader sense and thus CSR objectives are progressively more integrated into corporate fleet strategies.

The new WLTP test is already largely taken into account by large and very large companies in the definition of their car policies (respectively 46% and 62% of them). Small and medium-sized companies intend also to take into account these new values issued from this new protocol in their results over the next 3 years. It is obvious that the CO₂ emission rate is taken into account to define part of the rules of the company car policies, but the corporates also tell us to be sensitive to NOx and fine particles even if they don’t have the possibility to fix the numerical caps as it is the case for CO₂.

Having enough benchmarking insights readily available on alternative strategies, but also on fuel spend and more broadly on the TCO of existing and new vehicle models, is the expertise that corporate fleet managers and decision makers welcome and appreciate nowadays to come from their lessors.
MOBILITY SERVICES

The interest of fleet managers for mobility services to be implemented in their company is on the increase.

Car Sharing and Ride sharing as a service are one of the major topics of interest for fleet managers. As for the implementation of alternative energy vehicles, 44% of the fleet managers are considering or have already implemented one of these two services in their companies. Mobility budget management is also a service in a few countries that fleet managers are considering more and more.

This concerns about half to one-third of very large and large businesses. The most advanced countries in this field are Belgium, Switzerland, the Netherlands, France and United Kingdom.

The share of companies that have integrated telematics tools into their fleets is also a proof of the evolution of the way of apprehending the needs in terms of mobility. A large proportion of large and very large companies (almost a third) have already equipped all or part of their fleets with telematics tools. This rate reaches almost half of the large and very large companies in countries like the Netherlands, Poland or UK. Today, these tools are mainly used for real-time vehicle location, but also to optimize the fleet TCO or to improve drivers’ behaviour and resulting safety.
MAIN RESULTS

FLEET GROWTH

Every year, we measure and find that business confidence is increasing with respect to the growth of their fleet. Our indicator increased by 1 point on the two previous years and by 2 points on the last measure. The largest companies are the ones that express the highest level of confidence in the future.

Today we reach high levels of confidence:
- For the very large companies, 27% anticipate an increase of their fleets size versus only 9% who anticipate a contraction
- For the smallest companies, the share of companies anticipating a rise is also greater: 13% versus only 4% who anticipate a decline

More specifically, the countries where large and very large companies are the most confident are Belgium, Spain, France and Italy. For small and medium-sized corporates, the most confidents in the future are in the UK.

FINANCING SOLUTIONS

Operational leasing is the solution most often preferred by large and very large companies: 38% of large companies and 51% of very large companies have declared that Full Service Leasing is the main source of funding for their vehicle fleets. These values are stable over time. On the other hand, in the case of smaller companies, we see a change: over the past 3 years; the part of companies using Operational Leasing as a financing fleet vehicles mode has increased from 9% to 12% for small businesses and from 17% to 21% for medium-sized corporates.
I - FLEET PROFILE
I - FLEET PROFILE

A. FLEET CHARACTERISTICS
Can you please tell me the total number of vehicles of less than 3.5 tons in your fleet?

**NUMBER OF VEHICLES IN FLEET**

<table>
<thead>
<tr>
<th>Total</th>
<th>1 to 9 vehicles</th>
<th>10 to 99 vehicles</th>
<th>100 to 499 vehicles</th>
<th>500 vehicles and more</th>
</tr>
</thead>
<tbody>
<tr>
<td>57%</td>
<td>99%</td>
<td>70%</td>
<td>30%</td>
<td>12%</td>
</tr>
<tr>
<td>31%</td>
<td>1%</td>
<td>30%</td>
<td>59%</td>
<td>45%</td>
</tr>
<tr>
<td>9%</td>
<td>30%</td>
<td>11%</td>
<td>30%</td>
<td>30%</td>
</tr>
<tr>
<td>3%</td>
<td></td>
<td></td>
<td></td>
<td>12%</td>
</tr>
</tbody>
</table>
## NUMBER OF VEHICLES IN FLEET

<table>
<thead>
<tr>
<th></th>
<th>EU</th>
<th>FR</th>
<th>IT</th>
<th>UK</th>
<th>NL</th>
<th>ES</th>
<th>BE</th>
<th>CZ</th>
<th>DE</th>
<th>PL</th>
<th>PT</th>
<th>CH</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 to 9 vehicles</td>
<td>88%</td>
<td>86%</td>
<td>95%</td>
<td>88%</td>
<td>85%</td>
<td>86%</td>
<td>84%</td>
<td>84%</td>
<td>88%</td>
<td>91%</td>
<td>88%</td>
<td>92%</td>
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<td>10 to 99 vehicles</td>
<td>12%</td>
<td>14%</td>
<td>5%</td>
<td>11%</td>
<td>15%</td>
<td>14%</td>
<td>16%</td>
<td>16%</td>
<td>12%</td>
<td>9%</td>
<td>12%</td>
<td>8%</td>
</tr>
<tr>
<td>100 to 499 vehicles</td>
<td>&lt; 1%</td>
<td>-</td>
<td>-</td>
<td>1%</td>
<td>-</td>
<td>1%</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>EU</th>
<th>FR</th>
<th>IT</th>
<th>UK</th>
<th>NL</th>
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<th>BE</th>
<th>CZ</th>
<th>DE</th>
<th>PL</th>
<th>PT</th>
<th>CH</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 to 9 vehicles</td>
<td>22%</td>
<td>18%</td>
<td>34%</td>
<td>17%</td>
<td>22%</td>
<td>11%</td>
<td>6%</td>
<td>31%</td>
<td>16%</td>
<td>26%</td>
<td>28%</td>
<td>32%</td>
</tr>
<tr>
<td>10 to 99 vehicles</td>
<td>53%</td>
<td>43%</td>
<td>45%</td>
<td>49%</td>
<td>54%</td>
<td>51%</td>
<td>45%</td>
<td>59%</td>
<td>59%</td>
<td>64%</td>
<td>55%</td>
<td>57%</td>
</tr>
<tr>
<td>100 to 499 vehicles</td>
<td>19%</td>
<td>25%</td>
<td>17%</td>
<td>24%</td>
<td>19%</td>
<td>27%</td>
<td>39%</td>
<td>7%</td>
<td>20%</td>
<td>8%</td>
<td>13%</td>
<td>9%</td>
</tr>
<tr>
<td>500 vehicles and more</td>
<td>6%</td>
<td>13%</td>
<td>4%</td>
<td>10%</td>
<td>4%</td>
<td>10%</td>
<td>11%</td>
<td>2%</td>
<td>4%</td>
<td>3%</td>
<td>4%</td>
<td>1%</td>
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</tbody>
</table>
## FLEET GROWTH POTENTIAL

by company size

**In the next three years, do you think that the total number of vehicles in your company fleet will?**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
<td>6%</td>
<td>19%</td>
<td>+13</td>
<td>+11</td>
<td>+10</td>
<td>+9</td>
</tr>
<tr>
<td><strong>≤ 199</strong></td>
<td>4%</td>
<td>13%</td>
<td>+8</td>
<td>+8</td>
<td>+4</td>
<td>+6</td>
</tr>
<tr>
<td><strong>200–999</strong></td>
<td>4%</td>
<td>17%</td>
<td>+12</td>
<td>+9</td>
<td>+9</td>
<td>+6</td>
</tr>
<tr>
<td><strong>≥ 1000</strong></td>
<td>6%</td>
<td>21%</td>
<td>+16</td>
<td>+14</td>
<td>+10</td>
<td>+10</td>
</tr>
<tr>
<td><strong>≥ 1500</strong></td>
<td>9%</td>
<td>27%</td>
<td>+17</td>
<td>+15</td>
<td>+20</td>
<td>+15</td>
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</tbody>
</table>

Balance = Fleet growth will increase – Fleet growth will decrease
# FLEET GROWTH POTENTIAL

by company size

In the next three years, do you think that the total number of vehicles in your company fleet will?

% which think that the total number of vehicles of their company fleet will increase or decrease

<table>
<thead>
<tr>
<th>Country</th>
<th>Decrease</th>
<th>Increase</th>
<th>Balance 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
<td>4%</td>
<td>14%</td>
<td>+10</td>
</tr>
<tr>
<td>EU</td>
<td>8%</td>
<td>34%</td>
<td>+27</td>
</tr>
<tr>
<td>UK</td>
<td>4%</td>
<td>25%</td>
<td>+21</td>
</tr>
<tr>
<td>PL</td>
<td>6%</td>
<td>16%</td>
<td>+10</td>
</tr>
<tr>
<td>BE</td>
<td>5%</td>
<td>14%</td>
<td>+9</td>
</tr>
<tr>
<td>FR</td>
<td>5%</td>
<td>14%</td>
<td>+9</td>
</tr>
<tr>
<td>CH</td>
<td>5%</td>
<td>14%</td>
<td>+9</td>
</tr>
<tr>
<td>PT</td>
<td>2%</td>
<td>10%</td>
<td>+8</td>
</tr>
<tr>
<td>IT</td>
<td>5%</td>
<td>13%</td>
<td>+8</td>
</tr>
<tr>
<td>CZ</td>
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<td>DE</td>
<td>4%</td>
<td>6%</td>
<td>+2</td>
</tr>
<tr>
<td>NL</td>
<td>6%</td>
<td>7%</td>
<td>+2</td>
</tr>
</tbody>
</table>

Balance = Fleet growth will increase – Fleet growth will decrease

20
## FLEET GROWTH POTENTIAL by company size

In the next three years, do you think that the total number of vehicles in your company fleet will?

% which think that the total number of vehicles of their company fleet will increase or decrease

<table>
<thead>
<tr>
<th></th>
<th>Decrease</th>
<th>Increase</th>
<th>Balance 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td>+16</td>
</tr>
<tr>
<td>EU</td>
<td>7%</td>
<td>24%</td>
<td>+16</td>
</tr>
<tr>
<td>BE</td>
<td>4%</td>
<td>39%</td>
<td>+36</td>
</tr>
<tr>
<td>ES</td>
<td>6%</td>
<td>30%</td>
<td>+24</td>
</tr>
<tr>
<td>FR</td>
<td>10%</td>
<td>30%</td>
<td>+20</td>
</tr>
<tr>
<td>IT</td>
<td>5%</td>
<td>25%</td>
<td>+19</td>
</tr>
<tr>
<td>PL</td>
<td>7%</td>
<td>24%</td>
<td>+16</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Decrease</th>
<th>Increase</th>
<th>Balance 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td>+16</td>
</tr>
<tr>
<td>CZ</td>
<td>1%</td>
<td>17%</td>
<td>+16</td>
</tr>
<tr>
<td>NL</td>
<td>7%</td>
<td>21%</td>
<td>+14</td>
</tr>
<tr>
<td>PT</td>
<td>9%</td>
<td>21%</td>
<td>+12</td>
</tr>
<tr>
<td>UK</td>
<td>12%</td>
<td>24%</td>
<td>+12</td>
</tr>
<tr>
<td>DE</td>
<td>6%</td>
<td>13%</td>
<td>+6</td>
</tr>
<tr>
<td>CH</td>
<td>11%</td>
<td>15%</td>
<td>+4</td>
</tr>
</tbody>
</table>

Balance = Fleet growth will increase – Fleet growth will decrease
# FLEET GROWTH POTENTIAL

**by fleet size**

*In the next three years, do you think that the total number of vehicles in your company fleet will?*

% which think that the total number of vehicles of their company fleet will increase or decrease

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
<td>6%</td>
<td>19%</td>
<td>+13</td>
<td>+11</td>
<td>+10</td>
<td>+9</td>
</tr>
<tr>
<td>Cars</td>
<td>5%</td>
<td>13%</td>
<td>+8</td>
<td>+7</td>
<td>+5</td>
<td>+6</td>
</tr>
<tr>
<td>Vans</td>
<td>7%</td>
<td>19%</td>
<td>+12</td>
<td>+13</td>
<td>+15</td>
<td>+9</td>
</tr>
<tr>
<td>SUVs</td>
<td>9%</td>
<td>35%</td>
<td>+27</td>
<td>+19</td>
<td>+20</td>
<td>+16</td>
</tr>
</tbody>
</table>

Balance = Fleet growth will increase – Fleet growth will decrease
In the next three years, do you think that the total number of vehicles in your company fleet will increase or decrease?

% which think that the total number of vehicles of their company fleet will increase or decrease

<table>
<thead>
<tr>
<th>Country</th>
<th>Decrease</th>
<th>Increase</th>
<th>Balance 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU</td>
<td>5%</td>
<td>13%</td>
<td>+8</td>
</tr>
<tr>
<td>UK</td>
<td>9%</td>
<td>32%</td>
<td>+24</td>
</tr>
<tr>
<td>PL</td>
<td>5%</td>
<td>22%</td>
<td>+17</td>
</tr>
<tr>
<td>IT</td>
<td>4%</td>
<td>13%</td>
<td>+9</td>
</tr>
<tr>
<td>PT</td>
<td>2%</td>
<td>11%</td>
<td>+8</td>
</tr>
<tr>
<td>BE</td>
<td>6%</td>
<td>13%</td>
<td>+7</td>
</tr>
<tr>
<td>CZ</td>
<td>1%</td>
<td>7%</td>
<td>+6</td>
</tr>
<tr>
<td>CH</td>
<td>5%</td>
<td>11%</td>
<td>+6</td>
</tr>
<tr>
<td>FR</td>
<td>6%</td>
<td>12%</td>
<td>+6</td>
</tr>
<tr>
<td>ES</td>
<td>3%</td>
<td>7%</td>
<td>+5</td>
</tr>
<tr>
<td>NL</td>
<td>5%</td>
<td>8%</td>
<td>+3</td>
</tr>
<tr>
<td>DE</td>
<td>4%</td>
<td>4%</td>
<td>0</td>
</tr>
</tbody>
</table>

Balance = Fleet growth will increase – Fleet growth will decrease
# Fleet Growth Potential

by fleet size

In the next three years, do you think that the total number of vehicles in your company fleet will?

% which think that the total number of vehicles of their company fleet will increase or decrease

<table>
<thead>
<tr>
<th>Country</th>
<th>Decrease</th>
<th>Increase</th>
<th>Balance 2018</th>
<th>EU (2018)</th>
<th>Increase</th>
<th>Decrease</th>
<th>Balance 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td>7% 19% +12</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FR</td>
<td>3%</td>
<td>29%</td>
<td>+26</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BE</td>
<td>7%</td>
<td>28%</td>
<td>+21</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PL</td>
<td>3%</td>
<td>23%</td>
<td>+20</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>IT</td>
<td>7%</td>
<td>22%</td>
<td>+15</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NL</td>
<td>3%</td>
<td>17%</td>
<td>+14</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CZ</td>
<td>4%</td>
<td>17%</td>
<td>+12</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ES</td>
<td>7%</td>
<td>19%</td>
<td>+12</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK</td>
<td>8%</td>
<td>19%</td>
<td>+10</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PT</td>
<td>10%</td>
<td>15%</td>
<td>+5</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CH</td>
<td>14%</td>
<td>17%</td>
<td>+2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DE</td>
<td>5%</td>
<td>7%</td>
<td>+1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Balance = Fleet growth will increase – Fleet growth will decrease
# FLEET GROWTH POTENTIAL

by fleet size

*In the next three years, do you think that the total number of vehicles in your company fleet will?*

% which think that the total number of vehicles of their company fleet will increase or decrease

<table>
<thead>
<tr>
<th>Country</th>
<th>Decrease</th>
<th>Increase</th>
<th>Balance 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>9%</td>
<td>35%</td>
<td>+27</td>
</tr>
<tr>
<td>EU</td>
<td>1%</td>
<td>45%</td>
<td>+44</td>
</tr>
<tr>
<td>BE</td>
<td>7%</td>
<td>44%</td>
<td>+37</td>
</tr>
<tr>
<td>ES</td>
<td>31%</td>
<td>35%</td>
<td>+31</td>
</tr>
<tr>
<td>IT</td>
<td>6%</td>
<td>36%</td>
<td>+30</td>
</tr>
<tr>
<td>PT</td>
<td>10%</td>
<td>36%</td>
<td>+26</td>
</tr>
<tr>
<td>PL</td>
<td>10%</td>
<td>36%</td>
<td>+26</td>
</tr>
<tr>
<td>FR</td>
<td>13%</td>
<td>36%</td>
<td>+23</td>
</tr>
<tr>
<td>UK</td>
<td>15%</td>
<td>35%</td>
<td>+20</td>
</tr>
<tr>
<td>CH</td>
<td>13%</td>
<td>32%</td>
<td>+19</td>
</tr>
<tr>
<td>DE</td>
<td>7%</td>
<td>25%</td>
<td>+18</td>
</tr>
<tr>
<td>NL</td>
<td>13%</td>
<td>24%</td>
<td>+11</td>
</tr>
</tbody>
</table>

*Balance = Fleet growth will increase – Fleet growth will decrease*
HOW LONG THE COMPANY KEEPS ITS VEHICLE by company size

On average, how long do you keep your vehicles before being sold (new precision added for the 2018 questionnaire) or giving back to the leasing company?

Average in years

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>&lt; 5</th>
<th>5,1-6</th>
<th>6,1-7</th>
<th>&gt; 7</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>5,7</td>
<td>6,2</td>
<td>6,3</td>
<td>5,4</td>
<td>5,0</td>
</tr>
</tbody>
</table>
### How Long the Company Keeps Its Vehicle

**By Company Size**

*On average, how long do you keep your vehicles before being sold (new precision added for the 2018 questionnaire) or giving back to the leasing company?*

<table>
<thead>
<tr>
<th>Country</th>
<th>EU</th>
<th>CH</th>
<th>IT</th>
<th>PL</th>
<th>PT</th>
<th>NL</th>
<th>CZ</th>
<th>ES</th>
<th>BE</th>
<th>DE</th>
<th>FR</th>
<th>UK</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
<td>5.7</td>
<td>7.5</td>
<td>6.6</td>
<td>6.5</td>
<td>6.5</td>
<td>5.7</td>
<td>5.7</td>
<td>5.3</td>
<td>5.2</td>
<td>5.1</td>
<td>4.9</td>
<td>3.9</td>
</tr>
<tr>
<td><strong>Men + Women</strong></td>
<td>6.3</td>
<td>7.6</td>
<td>7.7</td>
<td>6.7</td>
<td>6.8</td>
<td>6.1</td>
<td>5.7</td>
<td>6.2</td>
<td>5.6</td>
<td>5.9</td>
<td>6.1</td>
<td>4.0</td>
</tr>
<tr>
<td><strong>Employees + Managers</strong></td>
<td>5.2</td>
<td>7.4</td>
<td>5.3</td>
<td>6.4</td>
<td>6.1</td>
<td>5.3</td>
<td>5.7</td>
<td>4.4</td>
<td>4.7</td>
<td>4.1</td>
<td>3.7</td>
<td>3.9</td>
</tr>
</tbody>
</table>
**HOW LONG THE COMPANY KEEPS ITS VEHICLE**

*by fleet size*

On average, how long do you keep your vehicles before being sold (new precision added for the 2018 questionnaire) or giving back to the leasing company?

**Average in years**

<table>
<thead>
<tr>
<th>Total</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>5,7</td>
<td>6,2</td>
<td>5,4</td>
<td>4,8</td>
</tr>
</tbody>
</table>

*CS3 Corporate Vehicle Observatory*
HOW LONG THE COMPANY KEEPS ITS VEHICLE
by fleet size

On average, how long do you keep your vehicles before being sold (new precision added for the 2018 questionnaire) or giving back to the leasing company?

<table>
<thead>
<tr>
<th>Average in years</th>
<th>EU</th>
<th>CH</th>
<th>IT</th>
<th>PL</th>
<th>PT</th>
<th>NL</th>
<th>CZ</th>
<th>ES</th>
<th>BE</th>
<th>DE</th>
<th>FR</th>
<th>UK</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
<td>5,7</td>
<td>7,5</td>
<td>6,6</td>
<td>6,5</td>
<td>6,5</td>
<td>5,7</td>
<td>5,7</td>
<td>5,3</td>
<td>5,2</td>
<td>5,1</td>
<td>4,9</td>
<td>3,9</td>
</tr>
<tr>
<td><strong>small fleet</strong></td>
<td>6,2</td>
<td>7,8</td>
<td>7,5</td>
<td>6,8</td>
<td>6,6</td>
<td>5,9</td>
<td>5,6</td>
<td>6,3</td>
<td>5,5</td>
<td>5,9</td>
<td>5,8</td>
<td>3,9</td>
</tr>
<tr>
<td><strong>medium fleet</strong></td>
<td>5,4</td>
<td>6,9</td>
<td>5,6</td>
<td>6,4</td>
<td>7,0</td>
<td>4,8</td>
<td>6,3</td>
<td>4,8</td>
<td>5,0</td>
<td>4,3</td>
<td>4,1</td>
<td>3,6</td>
</tr>
<tr>
<td><strong>large fleet</strong></td>
<td>4,8</td>
<td>7,4</td>
<td>4,3</td>
<td>5,5</td>
<td>5,0</td>
<td>6,4</td>
<td>4,7</td>
<td>3,9</td>
<td>4,8</td>
<td>3,8</td>
<td>3,8</td>
<td>4,2</td>
</tr>
</tbody>
</table>

29
I - FLEET PROFILE

B. ENERGY MIX
Amongst the following technologies, which one do you consider to use?

Proportion of companies having already or considering to implement in the next 3 years new energies or technologies in their fleet (in at least one of their fleet vehicles)

<table>
<thead>
<tr>
<th>Technology</th>
<th>Already implemented</th>
<th>Considered in the next 3 years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>44%</td>
<td>32% 37% 46% 68%</td>
</tr>
<tr>
<td>Hybrid</td>
<td>29%</td>
<td>20% 23% 31% 47%</td>
</tr>
<tr>
<td>Plug-in Hybrid</td>
<td>23%</td>
<td>16% 17% 24% 40%</td>
</tr>
<tr>
<td>CNG (Compressed Natural Gas)</td>
<td>8%</td>
<td>5% 6% 8% 15%</td>
</tr>
<tr>
<td>LPG (Liquefied Petroleum Gas)</td>
<td>8%</td>
<td>8% 7% 8% 11%</td>
</tr>
<tr>
<td>Electric Vehicle</td>
<td>26%</td>
<td>16% 18% 27% 52%</td>
</tr>
<tr>
<td>Fuel Cell Electric / Hydrogen</td>
<td>7%</td>
<td>6% 5% 7% 11%</td>
</tr>
</tbody>
</table>
DEVELOPMENT POTENTIAL OF NEW ENERGIES OR TECHNOLOGIES - by fleet size

Amongst the following technologies, which one do you consider to use?

Proportion of companies having already or considering to implement in the next 3 years new energies or technologies in their fleet

<table>
<thead>
<tr>
<th>Technology</th>
<th>Total</th>
<th>Already implemented</th>
<th>Considered in the next 3 years</th>
</tr>
</thead>
<tbody>
<tr>
<td>At least one technology</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>44%</td>
<td>33%</td>
<td>47%</td>
</tr>
<tr>
<td>Hybrid</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Already implemented</td>
<td>29%</td>
<td>20%</td>
<td>30%</td>
</tr>
<tr>
<td>Considered in the next 3 years</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Plug-in Hybrid</td>
<td>23%</td>
<td>16%</td>
<td>25%</td>
</tr>
<tr>
<td>CNG (Compressed Natural Gas)</td>
<td></td>
<td>5%</td>
<td>8%</td>
</tr>
<tr>
<td>LPG (Liquefied Petroleum Gas)</td>
<td>8%</td>
<td>8%</td>
<td>11%</td>
</tr>
<tr>
<td>Electric Vehicle</td>
<td>26%</td>
<td>17%</td>
<td>26%</td>
</tr>
<tr>
<td>Fuel Cell Electric / Hydrogen</td>
<td>7%</td>
<td>5%</td>
<td>7%</td>
</tr>
</tbody>
</table>

32
DEVELOPMENT POTENTIAL OF NEW ENERGIES OR TECHNOLOGIES: At least one technology

Amongst the following technologies, which one do you consider to use?

Proportion of companies having already or considering to implement in the next 3 years new energies or technologies in their fleet (hybrid, plug-in hybrid, CNG, LPG, electric vehicle or fuel cell electric / hydrogen)

% Already implemented + considered in the next 3 years

TOP 3

#1 BE 64%
#2 UK 61%
#3 NL 58%

#4 CH 51%
#5 IT 45%
#6 FR 41%
#7 ES 39%
#8 DE 38%
#9 PL 36%
#10 PT 36%
#11 CZ 10%
HYBRYD DEVELOPMENT POTENTIAL

Amongst the following technologies, which one do you consider to use?

Proportion of companies having already or considering to implement in the next 3 years hybrid technology in their fleet

% Already implemented + considered in the next 3 years

TOP 3

#1 UK 53%
#2 BE 51%
#3 NL 37%

#4 CH 36%
#5 FR 30%
#6 ES 30%
#7 IT 22%
#8 PT 22%
#9 PL 19%
#10 DE 16%
#11 CZ 3%

Proportion of companies having already or considering to implement in the next 3 years hybrid technology in their fleet
### ELECTRIC VEHICLE DEVELOPMENT POTENTIAL

Amongst the following technologies, which one do you consider to use?

Proportion of companies having already or considering to implement in the next 3 years electric vehicle technology in their fleet

<table>
<thead>
<tr>
<th>Country</th>
<th>% Already implemented + considered in the next 3 years</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1 NL</td>
<td>45%</td>
</tr>
<tr>
<td>#2 UK</td>
<td>42%</td>
</tr>
<tr>
<td>#3 BE</td>
<td>37%</td>
</tr>
<tr>
<td>#4 CH</td>
<td>34%</td>
</tr>
<tr>
<td>#5 DE</td>
<td>28%</td>
</tr>
<tr>
<td>#6 FR</td>
<td>26%</td>
</tr>
<tr>
<td>#7 ES</td>
<td>25%</td>
</tr>
<tr>
<td>#8 PT</td>
<td>23%</td>
</tr>
<tr>
<td>#9 IT</td>
<td>15%</td>
</tr>
<tr>
<td>#10 PL</td>
<td>11%</td>
</tr>
<tr>
<td>#11 CZ</td>
<td>3%</td>
</tr>
</tbody>
</table>
Amongst the following technologies, which one do you consider to use?

Proportion of companies having already or considering to implement in the next 3 years plug-in hybrid technology in their fleet

% Already implemented + considered in the next 3 years

**TOP 3**

1. **UK** - 46%
2. **BE** - 43%
3. **NL** - 40%

---

4. **CH** - 25%
5. **FR** - 22%
6. **PT** - 20%
7. **ES** - 16%
8. **DE** - 15%
9. **IT** - 14%
10. **PL** - 14%
11. **CZ** - 1%
CNG / COMPRESSED NATURAL GAS DEVELOPMENT POTENTIAL

Amongst the following technologies, which one do you consider to use?

Proportion of companies having already or considering to implement in the next 3 years CNG (compressed natural gas) technology in their fleet

% Already implemented + considered in the next 3 years

TOP 3

19%  
#1 BE

18%  
#2 IT

11%  
#3 UK

8%  
EU

10%  
ES

8%  
NL

7%  
CH

7%  
DE

3%  
CZ

3%  
PT

3%  
PL

2%  
FR
LPG / LIQUEFIED PETROLEUM GAS DEVELOPMENT POTENTIAL

Amongst the following technologies, which one do you consider to use?

Proportion of companies having already or considering to implement in the next 3 years LPG (liquefied petroleum gas) technology in their fleet

% Already implemented + considered in the next 3 years

TOP 3

#1 PL 17%
#2 IT 16%
#3 UK 14%

#4 ES 11%
#5 BE 8%
#6 DE 7%
#7 NL 6%
#8 CH 6%
#9 PT 4%
#10 CZ 3%
#11 FR 1%

Proportion of companies having already or considering to implement in the next 3 years LPG (liquefied petroleum gas) technology in their fleet
FUEL CELL ELECTRIC / HYDROGEN DEVELOPMENT POTENTIAL

Amongst the following technologies, which one do you consider to use?

Proportion of companies having already or considering to implement in the next 3 years fuel cell electric / hydrogen technology in their fleet

% Already implemented + considered in the next 3 years

TOP 3

#1 UK 22%
#2 ES 10%
#3 NL 9%

#4 CH 8%
#5 BE 8%
#6 PT 5%
#7 PL 5%
#8 IT 4%
#9 DE 4%
#10 FR 3%
#11 CZ <1%

Proportion of companies having already or considering to implement in the next 3 years fuel cell electric / hydrogen technology in their fleet

% Already implemented + considered in the next 3 years

TOP 3

#1 UK 22%
#2 ES 10%
#3 NL 9%

#4 CH 8%
#5 BE 8%
#6 PT 5%
#7 PL 5%
#8 IT 4%
#9 DE 4%
#10 FR 3%
#11 CZ <1%
IMpact of the WLTP test
by company size

Today, fuel consumption and CO2 emissions are determined with a new, more realistic test cycle: the WLTP-test. Has, or will the new higher and more realistic fuel consumption levels and related CO2 emissions impact on your fleet policy?

Proportion of companies having already or expecting to be impacted in the next 3 years by the new WLTP test

<table>
<thead>
<tr>
<th>% Yes, already</th>
<th>11%</th>
<th>11%</th>
<th>20%</th>
<th>31%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Already or expected</td>
<td>36%</td>
<td>36%</td>
<td>46%</td>
<td>62%</td>
</tr>
<tr>
<td>Total</td>
<td>44%</td>
<td>36%</td>
<td>36%</td>
<td>46%</td>
</tr>
</tbody>
</table>
IMPACT OF THE WLTP TEST
by fleet size

Today, fuel consumption and CO2 emissions are determined with a new, more realistic test cycle: the WLTP-test. Has, or will the new higher and more realistic fuel consumption levels and related CO2 emissions impact on your fleet policy?

Proportion of companies having already or expecting to be impacted in the next 3 years by the new WLTP test
Today, fuel consumption and CO2 emissions are determined with a new, more realistic test cycle: the WLTP-test. Has, or will the new higher and more realistic fuel consumption levels and related CO2 emissions impact on your fleet policy?

Proportion of companies having already or expecting to be impacted in the next 3 years by the new WLTP test
Today, fuel consumption and CO2 emissions are determined with a new, more realistic test cycle: the WLTP-test. Has, or will the new higher and more realistic fuel consumption levels and related CO2 emissions impact on your fleet policy?

Proportion of companies having already or expecting to be impacted in the next 3 years by the new WLTP test
IMPACT OF THE WLTP TEST

Today, fuel consumption and CO2 emissions are determined with a new, more realistic test cycle: the WLTP-test. Has, or will the new higher and more realistic fuel consumption levels and related CO2 emissions impact on your fleet policy?

Proportion of companies having already or expecting to be impacted in the next 3 years by the new WLTP test

% Already implemented + considered in the next 3 years

TOP 3

EU 53%

#1 BE 80%

#2 PT 69%

#3 UK 63%

#4 FR 62%

#5 PL 61%

#6 ES 59%

#7 NL 57%

#8 CH 50%

#9 IT 45%

#10 DE 21%

#11 CZ 20%
**EMISSIONS TAKEN INTO ACCOUNT IN THE CAR POLICY**

Which of the following emissions do you take into account in your company car policy?

Proportion of companies taking into account the following pollutant emission in their fleet policy

<table>
<thead>
<tr>
<th>Emission Type</th>
<th>Total</th>
<th>14%</th>
<th>16%</th>
<th>20%</th>
<th>26%</th>
<th>25%</th>
<th>29%</th>
<th>27%</th>
<th>49%</th>
<th>49%</th>
<th>66%</th>
<th>75%</th>
<th>6%</th>
<th>8%</th>
<th>4%</th>
<th>5%</th>
<th>39%</th>
<th>38%</th>
<th>23%</th>
<th>16%</th>
</tr>
</thead>
<tbody>
<tr>
<td>NOx (nitrogen oxide)</td>
<td>18%</td>
<td>14%</td>
<td>16%</td>
<td>20%</td>
<td>26%</td>
<td>25%</td>
<td>29%</td>
<td>27%</td>
<td>49%</td>
<td>49%</td>
<td>66%</td>
<td>75%</td>
<td>6%</td>
<td>8%</td>
<td>4%</td>
<td>5%</td>
<td>39%</td>
<td>38%</td>
<td>23%</td>
<td>16%</td>
</tr>
<tr>
<td>Fine particles</td>
<td>26%</td>
<td>25%</td>
<td>25%</td>
<td>29%</td>
<td>27%</td>
<td>49%</td>
<td>49%</td>
<td>66%</td>
<td>75%</td>
<td>75%</td>
<td>75%</td>
<td>75%</td>
<td>6%</td>
<td>8%</td>
<td>4%</td>
<td>5%</td>
<td>39%</td>
<td>38%</td>
<td>23%</td>
<td>16%</td>
</tr>
<tr>
<td>CO2 (Carbon dioxide)</td>
<td>59%</td>
<td>49%</td>
<td>49%</td>
<td>66%</td>
<td>75%</td>
<td>49%</td>
<td>49%</td>
<td>66%</td>
<td>75%</td>
<td>75%</td>
<td>75%</td>
<td>75%</td>
<td>6%</td>
<td>8%</td>
<td>4%</td>
<td>5%</td>
<td>39%</td>
<td>38%</td>
<td>23%</td>
<td>16%</td>
</tr>
<tr>
<td>Other polluting emissions</td>
<td>6%</td>
<td>6%</td>
<td>8%</td>
<td>6%</td>
<td>5%</td>
<td>6%</td>
<td>8%</td>
<td>4%</td>
<td>5%</td>
<td>39%</td>
<td>38%</td>
<td>23%</td>
<td>16%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>None of these</td>
<td>30%</td>
<td>39%</td>
<td>38%</td>
<td>23%</td>
<td>16%</td>
<td>39%</td>
<td>38%</td>
<td>23%</td>
<td>16%</td>
<td>39%</td>
<td>38%</td>
<td>23%</td>
<td>16%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Which of the following emissions do you take into account in your company car policy?

<table>
<thead>
<tr>
<th>Emission Type</th>
<th>Total</th>
<th>Cars</th>
<th>Vans</th>
<th>Minibuses</th>
</tr>
</thead>
<tbody>
<tr>
<td>NOx (nitrogen oxide)</td>
<td>18%</td>
<td>15%</td>
<td>20%</td>
<td>25%</td>
</tr>
<tr>
<td>Fine particles</td>
<td>26%</td>
<td>25%</td>
<td>27%</td>
<td>28%</td>
</tr>
<tr>
<td>CO2 (Carbon dioxide)</td>
<td>59%</td>
<td>51%</td>
<td>60%</td>
<td>81%</td>
</tr>
<tr>
<td>Other polluting emissions</td>
<td>6%</td>
<td>7%</td>
<td>8%</td>
<td>4%</td>
</tr>
<tr>
<td>None of these</td>
<td>30%</td>
<td>37%</td>
<td>27%</td>
<td>13%</td>
</tr>
</tbody>
</table>
PROPORTION OF COMPANIES TAKING CO2 EMISSIONS INTO ACCOUNT IN THEIR CAR POLICY

Which of the following emissions do you take into account in your company car policy?

TOP 3

1. BE 82%
2. PT 80%
3. ES 70%

59%
II - FINANCING
What is the main financing method used to finance your company vehicles today?  

Proportion of companies using the following solutions as their main financing method for their fleet vehicles

<table>
<thead>
<tr>
<th>Total</th>
<th>Self purchase*</th>
<th>Car credit</th>
<th>Finance leasing</th>
<th>Operating leasing</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>39%</td>
<td>7%</td>
<td>26%</td>
<td>28%</td>
</tr>
<tr>
<td></td>
<td>47%</td>
<td>13%</td>
<td>28%</td>
<td>12%</td>
</tr>
<tr>
<td></td>
<td>43%</td>
<td>7%</td>
<td>30%</td>
<td>21%</td>
</tr>
<tr>
<td></td>
<td>35%</td>
<td>3%</td>
<td>25%</td>
<td>38%</td>
</tr>
<tr>
<td></td>
<td>29%</td>
<td>1%</td>
<td>19%</td>
<td>51%</td>
</tr>
</tbody>
</table>

*Self-purchase = outright purchase + credit (other than car credit)

Data have been consolidated: 3 years average
### MAIN FINANCING METHOD

#### by fleet size

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

Proportion of companies using the following solutions as their main financing method for their fleet vehicles

<table>
<thead>
<tr>
<th>Total</th>
<th>39%</th>
<th>7%</th>
<th>26%</th>
<th>28%</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>≤ 3 cars</th>
<th>46%</th>
<th>10%</th>
<th>28%</th>
<th>16%</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>3 - 9 cars</th>
<th>36%</th>
<th>3%</th>
<th>26%</th>
<th>35%</th>
</tr>
</thead>
</table>

| 10+ cars       | 23% | 1%  | 19% | 57% |

*Self-purchase = outright purchase + credit (other than car credit)*

Data have been consolidated: 3 years average
What is the main financing method used to finance your company vehicles today?

Proportion of companies using self purchase as their main financing method for their fleet vehicles

*Self-purchase = outright purchase + credit (other than car credit)
Data have been consolidated: 3 years average
What is the main financing method used to finance your company vehicles today?

Proportion of companies using the following solutions as their main financing method for their fleet vehicles

*Self-purchase = outright purchase + credit (other than car credit)
Data have been consolidated: 3 years average
Results provided for 2016 are calculated by the mean of an extrapolation between the results of the years 2015 and 2017.
What is the main financing method used to finance your company vehicles today?

Proportion of companies using the following solutions as their main financing method for their fleet vehicles

- Self purchase*
- Car credit
- Finance leasing
- Operating leasing

*Self-purchase = outright purchase + credit (other than car credit)

Data have been consolidated: 3 years average

Results provided for 2016 are calculated by the mean of an extrapolation between the results of the years 2015 and 2017.
EVOLUTION OF THE MAIN FINANCING METHOD
by company size – focus on 100 to 249/499/999

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

Proportion of companies using the following solutions as their main financing method for their fleet vehicles

*Self-purchase = outright purchase + credit (other than car credit)
Data have been consolidated: 3 years average
Results provided for 2016 are calculated by the mean of an extrapolation between the results of the years 2015 and 2017.
EVOLUTION OF THE MAIN FINANCING METHOD
by company size – focus on 250/500/1000 and more

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

Proportion of companies using the following solutions as their main financing method for their fleet vehicles

- Self purchase*
- Car credit
- Finance leasing
- Operating leasing

*Self-purchase = outright purchase + credit (other than car credit)
Data have been consolidated: 3 years average
Results provided for 2016 are calculated by the mean of an extrapolation between the results of the years 2015 and 2017.
EVOLUTION OF THE MAIN FINANCING METHOD
by fleet size – focus on 1 to 9

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

Proportion of companies using the following solutions as their main financing method for their fleet vehicles

<table>
<thead>
<tr>
<th>Year</th>
<th>Self purchase*</th>
<th>Car credit</th>
<th>Finance leasing</th>
<th>Operating leasing</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>10%</td>
<td>11%</td>
<td>11%</td>
<td>11%</td>
</tr>
<tr>
<td>2015</td>
<td>11%</td>
<td>11%</td>
<td>11%</td>
<td>11%</td>
</tr>
<tr>
<td>2016</td>
<td>11%</td>
<td>11%</td>
<td>14%</td>
<td>15%</td>
</tr>
<tr>
<td>2017</td>
<td>11%</td>
<td>11%</td>
<td>15%</td>
<td>16%</td>
</tr>
<tr>
<td>2018</td>
<td>10%</td>
<td>11%</td>
<td>16%</td>
<td>16%</td>
</tr>
</tbody>
</table>

*Self-purchase = outright purchase + credit (other than car credit)
Data have been consolidated: 3 years average
Results provided for 2016 are calculated by the mean of an extrapolation between the results of the years 2015 and 2017.
EVOLUTION OF THE MAIN FINANCING METHOD
by fleet size – focus on 10 to 49

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

Proportion of companies using the following solutions as their main financing method for their fleet vehicles

<table>
<thead>
<tr>
<th>Year</th>
<th>Self purchase*</th>
<th>Car credit</th>
<th>Finance leasing</th>
<th>Operating leasing</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>30%</td>
<td>4%</td>
<td>33%</td>
<td>3%</td>
</tr>
<tr>
<td>2015</td>
<td>32%</td>
<td>4%</td>
<td>33%</td>
<td>3%</td>
</tr>
<tr>
<td>2016</td>
<td>28%</td>
<td>4%</td>
<td>34%</td>
<td>26%</td>
</tr>
<tr>
<td>2017</td>
<td>26%</td>
<td>4%</td>
<td>34%</td>
<td>26%</td>
</tr>
<tr>
<td>2018</td>
<td>26%</td>
<td>4%</td>
<td>35%</td>
<td>35%</td>
</tr>
</tbody>
</table>

*Self-purchase = outright purchase + credit (other than car credit)

Data have been consolidated: 3 years average

Results provided for 2016 are calculated by the mean of an extrapolation between the results of the years 2015 and 2017.
What is the main financing method used to finance your company vehicles today?

Proportion of companies using the following solutions as their main financing method for their fleet vehicles

- 2014: 53%, 21%, 24%, 1%
- 2015: 52%, 23%, 23%, 1%
- 2016: 55%, 24%, 24%, 1%
- 2017: 57%, 21%, 24%, 1%
- 2018: 57%, 23%, 24%, 1%

*Self-purchase = outright purchase + credit (other than car credit)
Data have been consolidated: 3 years average
Results provided for 2016 are calculated by the mean of an extrapolation between the results of the years 2015 and 2017.
What is the main financing method used to finance your company vehicles today?

Proportion of companies using operating leasing as their main financing method for their fleet vehicles

**TOP 3**

- **#1 DE**: 36%
- **#2 ES**: 16%
- **#3 UK**: 14%

Data have been consolidated: 3 years average
What is the main financing method used to finance your company vehicles today?

Proportion of companies using operating leasing as their main financing method for their fleet vehicles

Data have been consolidated: 3 years average
What is the main financing method used to finance your company vehicles today?

Proportion of companies using operating leasing as their main financing method for their fleet vehicles

Data have been consolidated: 3 years average
What is the main financing method used to finance your company vehicles today?

Proportion of companies using operating leasing as their main financing method for their fleet vehicles

**TOP 3**

1. **FR** - 71%
2. **NL** - 71%
3. **ES** - 70%

Data have been consolidated: 3 years average
What is the main financing method used to finance your company vehicles today?

Proportion of companies using operating leasing as their main financing method for their fleet vehicles

Data have been consolidated: 3 years average
What is the main financing method used to finance your company vehicles today?

Proportion of companies using operating leasing as their main financing method for their fleet vehicles

Data have been consolidated: 3 years average
INTENTION TO DEVELOP OPERATING LEASING
by company size

In the next three years, do you intend to develop Operating Leasing in order to finance your corporate fleet?

Proportion of companies having the intention to develop operational leasing

Total

% Yes, certainly

<table>
<thead>
<tr>
<th>Company Size</th>
<th>Yes (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Small</td>
<td>23%</td>
</tr>
<tr>
<td>Medium</td>
<td>18%</td>
</tr>
<tr>
<td>Large</td>
<td>19%</td>
</tr>
<tr>
<td>Very Large</td>
<td>25%</td>
</tr>
<tr>
<td>Total</td>
<td>31%</td>
</tr>
</tbody>
</table>

(Reminder of 2017 results)
IN THE NEXT THREE YEARS, DO YOU INTEND TO DEVELOP OPERATING LEASING IN ORDER TO FINANCE YOUR CORPORATE FLEET?

Proportion of companies having the intention to develop operational leasing

<table>
<thead>
<tr>
<th>Fleet Size</th>
<th>% Yes</th>
<th>% Yes, certainly</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>23%</td>
<td>(24%)</td>
</tr>
<tr>
<td>Small</td>
<td>18%</td>
<td>(20%)</td>
</tr>
<tr>
<td>Medium</td>
<td>22%</td>
<td>(29%)</td>
</tr>
<tr>
<td>Large</td>
<td>36%</td>
<td>(33%)</td>
</tr>
</tbody>
</table>

(Reminder of 2017 results)
In the next three years, do you intend to develop Operating Leasing in order to finance your corporate fleet?

Proportion of companies having the intention to develop operational leasing

**TOP 3**

1. FR 35%
2. PL 34%
3. BE 33%

23%

#4 IT 28%
#5 UK 25%
#6 CH 21%
#7 NL 20%
#8 ES 17%
#9 PT 17%
#10 CZ 11%
#11 DE 8%
INTENTION TO DEVELOP OPERATING LEASING:
Yes

In the next three years, do you intend to develop Operating Leasing in order to finance your corporate fleet?

Proportion of companies having the intention to develop operational leasing

TOP 3

1. PL 34%
2. IT 28%
3. BE 24%

19%

EU

Proportion of companies having the intention to develop operational leasing:

#4 UK 22%
#5 CH 22%
#6 FR 22%
#7 ES 16%
#8 PT 14%
#9 NL 8%
#10 DE 8%
#11 CZ 7%
INTENTION TO DEVELOP OPERATING LEASING:

Yes

In the next three years, do you intend to develop Operating Leasing in order to finance your corporate fleet?

Proportion of companies having the intention to develop operational leasing

TOP 3

#1 FR 50%
#2 BE 43%
#3 PL 34%

In the next three years, do you intend to develop Operating Leasing in order to finance your corporate fleet?

Proportion of companies having the intention to develop operational leasing

#4 NL 34%
#5 UK 29%
#6 IT 29%
#7 PT 20%
#8 CH 19%
#9 ES 19%
#10 CZ 16%
#11 DE 9%
III - TELEMATICS
USE OF TELEMATICS
by company size

Have you implemented Telematics within your fleet?

Proportion of companies having implemented telematics in their fleet

<table>
<thead>
<tr>
<th>Company Size</th>
<th>Proportion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>19% (20%)</td>
</tr>
<tr>
<td>1-4 employees</td>
<td>8% (9%)</td>
</tr>
<tr>
<td>5-24 employees</td>
<td>17% (19%)</td>
</tr>
<tr>
<td>25-99 employees</td>
<td>26% (25%)</td>
</tr>
<tr>
<td>100+ employees</td>
<td>30% (33%)</td>
</tr>
</tbody>
</table>
USE OF TELEMATICS
by fleet size

Have you implemented Telematics within your fleet?

Proportion of companies having implemented telematics in their fleet

Total

19% (20%)  

10% (12%)  

27% (26%)  

37% (37%)

(Reminder of 2017 results)
USE OF TELEMATICS

Yes

Have you implemented Telematics within your fleet?

Proportion of companies having implemented telematics in their fleet

TOP 3

1. UK 33%
2. PL 28%
3. NL 28%

---

19%
Have you implemented Telematics within your fleet?

Proportion of companies having implemented telematics in their fleet

**TOP 3**

1. **UK** 22%
2. **CZ** 18%
3. **PL** 14%

Countries and implementation rates:

- **#4 NL** 14%
- **#5 BE** 11%
- **#6 PT** 11%
- **#7 IT** 10%
- **#8 FR** 9%
- **#9 ES** 7%
- **#10 DE** 6%
- **#11 CH** 4%
USE OF TELEMATICS

Yes

Have you implemented Telematics within your fleet?

Proportion of companies having implemented telematics in their fleet

TOP 3

- **#1** NL 46%
- **#2** PL 45%
- **#3** UK 45%

28%

Proportion of companies:

- **#4** CZ 37%
- **#5** ES 36%
- **#6** PT 21%
- **#7** FR 19%
- **#8** IT 17%
- **#9** CH 17%
- **#10** BE 14%
- **#11** DE 11%
PURPOSES FOR USING TELEMATICS

For which reasons do you use telematics within your company?

- Improve drivers safety: 60%
- Improve drivers behaviours: 55%
- Locate vehicles: 74%
- Optimize journeys: 61%
- Reduce fleet costs: 59%

Other: 14%
IV - PERSPECTIVE IN TERMS OF CORPORATE MOBILITY
### DEVELOPMENT POTENTIAL OF MOBILITY ALTERNATIVES by company size

**In the next 3 years, would you consider using the following alternatives?**

**Proportion of companies already using or considering to use in the next 3 years the following mobility alternatives**

<table>
<thead>
<tr>
<th>Mobility Alternative</th>
<th>Total</th>
<th>Small</th>
<th>Medium</th>
<th>Large</th>
<th>X-Large</th>
</tr>
</thead>
<tbody>
<tr>
<td>Car sharing or Ride sharing</td>
<td>37%</td>
<td>21%</td>
<td>32%</td>
<td>42%</td>
<td>60%</td>
</tr>
<tr>
<td>Car sharing</td>
<td>23%</td>
<td>12%</td>
<td>16%</td>
<td>28%</td>
<td>44%</td>
</tr>
<tr>
<td>(the company makes available upon reservation vehicles for its employees)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ride sharing</td>
<td>28%</td>
<td>15%</td>
<td>25%</td>
<td>31%</td>
<td>46%</td>
</tr>
<tr>
<td>between employees (several employees in the same car for a journey -car pooling, taxi service, private hire vehicle-)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
DEVELOPMENT POTENTIAL OF MOBILITY ALTERNATIVES
by fleet size

In the next 3 years, would you consider using the following alternatives?

Proportion of companies already using or considering to use in the next 3 years the following mobility alternatives

<table>
<thead>
<tr>
<th>Car sharing or Ride sharing</th>
<th>37%</th>
<th>26%</th>
<th>46%</th>
<th>59%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Car sharing</td>
<td>23%</td>
<td>14%</td>
<td>30%</td>
<td>43%</td>
</tr>
<tr>
<td>(the company makes available upon reservation vehicles for its employees)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ride sharing</td>
<td>28%</td>
<td>19%</td>
<td>34%</td>
<td>44%</td>
</tr>
<tr>
<td>between employees (several employees in the same car for a journey -car pooling, taxi service, private hire vehicle-)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
DEVELOPMENT POTENTIAL OF MOBILITY ALTERNATIVES

Car sharing or Ride sharing

In the next 3 years, would you consider using the following alternatives?

Proportion of companies already using or considering to use car sharing or ride sharing in the next 3 years

% Already using + considered in the next 3 years

TOP 3

UK 56%

CZ 47%

FR 43%

#1 UK

#2 CZ

#3 FR

#4 BE 42%

#5 PL 41%

#6 CH 40%

#7 NL 35%

#8 ES 32%

#9 PT 29%

#10 IT 23%

#11 DE 16%

In the next 3 years, would you consider using the following alternatives?
DEVELOPMENT POTENTIAL OF MOBILITY ALTERNATIVES

Car sharing

In the next 3 years, would you consider using the following alternatives?

Proportion of companies already using or considering to use car sharing in the next 3 years

% Already using + considered in the next 3 years

TOP 3

#1 CZ 35%

#2 UK 34%

#3 FR 29%

#4 PL 28%

#5 BE 27%

#6 CH 24%

#7 PT 22%

#8 ES 19%

#9 NL 18%

#10 IT 14%

#11 DE 7%
DEVELOPMENT POTENTIAL OF MOBILITY ALTERNATIVES

Ride sharing

In the next 3 years, would you consider using the following alternatives?

Proportion of companies already using or considering to use ride sharing in the next 3 years

% Already using + considered in the next 3 years

TOP 3

1. UK - 48%
2. CZ - 42%
3. BE - 31%

#4 CH - 29%
#5 PL - 28%
#6 FR - 27%
#7 NL - 26%
#8 ES - 22%
#9 PT - 19%
#10 IT - 18%
#11 DE - 13%

In the next 3 years, would you consider using the following alternatives?

Proportion of companies already using or considering to use ride sharing in the next 3 years

% Already using + considered in the next 3 years

TOP 3

1. UK - 48%
2. CZ - 42%
3. BE - 31%

#4 CH - 29%
#5 PL - 28%
#6 FR - 27%
#7 NL - 26%
#8 ES - 22%
#9 PT - 19%
#10 IT - 18%
#11 DE - 13%
PROPORTION OF COMPANIES READY TO GIVE UP ALL OR PART OF THEIR COMPANY CARS FOR ALTERNATIVE MOBILITY SOLUTIONS - by company size

And would you give up all or part of your company cars for such alternatives?

<table>
<thead>
<tr>
<th>Total</th>
<th>YES</th>
</tr>
</thead>
<tbody>
<tr>
<td>9%</td>
<td></td>
</tr>
<tr>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>18%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Car sharing or Ride sharing</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Car sharing</td>
<td>9%</td>
</tr>
<tr>
<td>Car sharing</td>
<td>5%</td>
</tr>
<tr>
<td>Ride sharing</td>
<td>6%</td>
</tr>
<tr>
<td>Ride sharing</td>
<td>6%</td>
</tr>
</tbody>
</table>

- Yes certainly
- Yes probably

- Car sharing or Ride sharing
- Total
- Yes certainly
- Yes probably
And would you give up all or part of your company cars for such alternatives?

**Total**

- **Yes certainly**
  - Car sharing or Ride sharing: 9%
  - Car sharing: 6%
  - Ride sharing: 6%

- **Yes probably**
  - Car sharing or Ride sharing: 6%
  - Car sharing: 4%
  - Ride sharing: 4%

- **Total**: 84
  - Car sharing: 6%
  - Ride sharing: 6%
  - Car sharing or Ride sharing: 9%
  - Total: 19%
And would you give up all or part of your company cars for such alternatives?

TOP 3

- **#1 BE** 17%
- **#2 CH** 14%
- **#3 NL** 13%

% YES

- **EU** 9%
- **9%**

Other countries and their percentages:

- **#4 FR** 12%
- **#5 UK** 11%
- **#6 IT** 10%
- **#7 PL** 8%
- **#8 PT** 5%
- **#9 ES** 4%
- **#10 DE** 4%
- **#11 CZ** 3%
PROPORTION OF COMPANIES READY TO GIVE UP ALL OR PART OF THEIR COMPANY CARS FOR CAR SHARING

And would you give up all or part of your company cars for such alternatives?

% YES

6%

TOP 3

11%

#1 CH

9%

#2 BE

8%

#3 IT

FR 8%

UK 8%

NL 7%

PL 4%

PT 3%

ES 3%

CZ 3%

DE 2%
And would you give up all or part of your company cars for such alternatives?

**PROPORTION OF COMPANIES READY TO GIVE UP ALL OR PART OF THEIR COMPANY CARS FOR RIDE SHARING**

- **BE** 12%
- **NL** 9%
- **UK** 9%

Top 3:

- **#1 BE** 12%
- **#2 NL** 9%
- **#3 UK** 9%

Other countries:

- **#4 CH** 9%
- **#5 FR** 7%
- **#6 PL** 6%
- **#7 IT** 5%
- **#8 PT** 4%
- **#9 CZ** 3%
- **#10 ES** 3%
- **#11 DE** 2%