

# MOBILITY AND FLEET BAROMETER 2023



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1

# CONTEXT AND METHODOLOGY



# KEY THEMES FOR ARVAL MOBILITY OBSERVATORY



— 1

WHAT SHORT TERM  
SHIFTS ARE SHAPING THE  
MARKET?



— 2

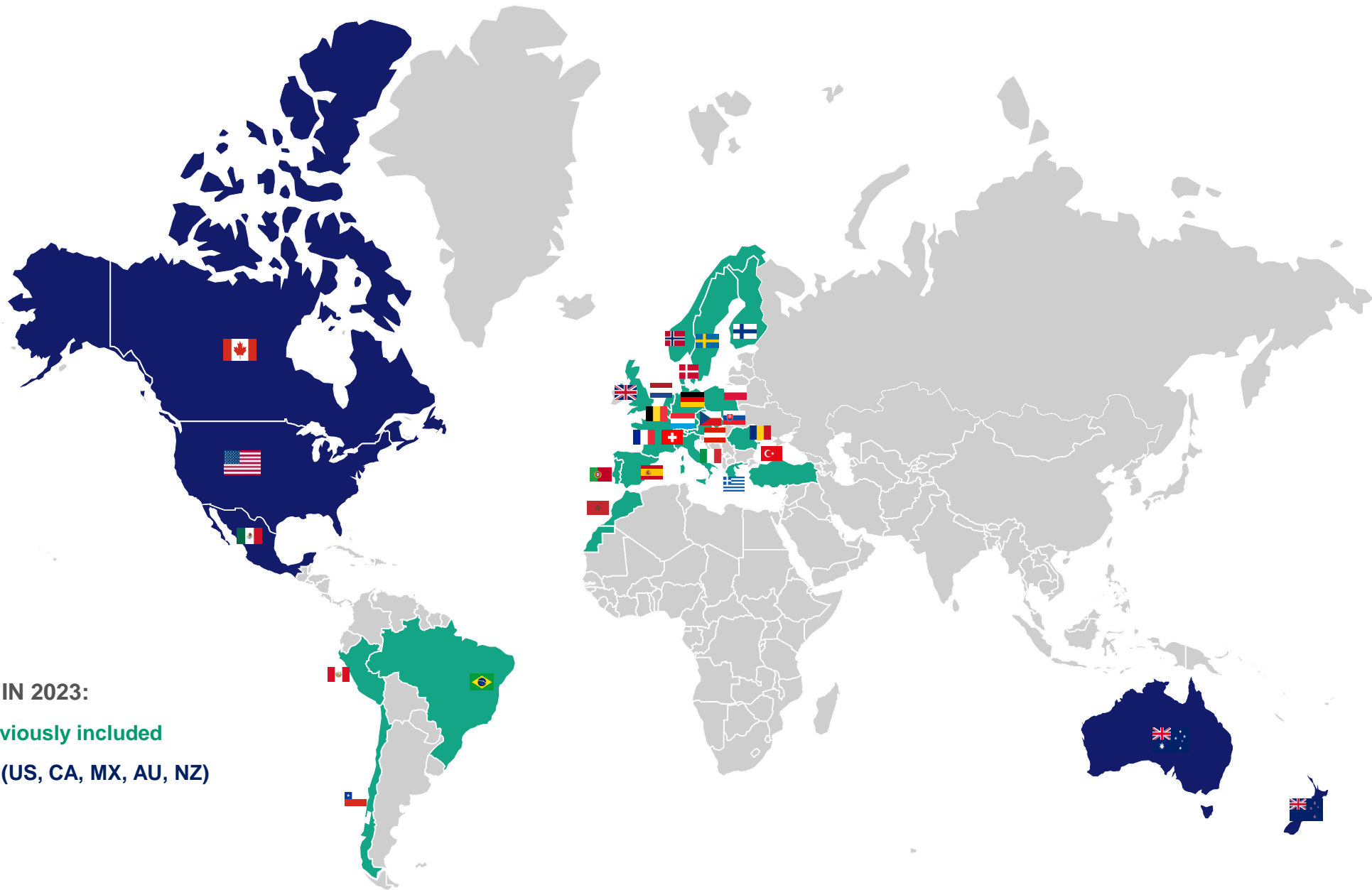
WHAT KIND OF VEHICLES  
WILL THE MARKET  
EXPECT IN 3 YEARS?



— 3

HOW DO MOBILITY  
SOLUTIONS IMPACT  
FLEET MANAGEMENT?

# SCOPE OF THE SURVEY



30 COUNTRIES IN 2023:

- 25 countries previously included
- 5 new countries (US, CA, MX, AU, NZ)



# METHODOLOGY

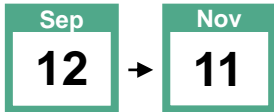


DATA COLLECTION  
METHOD

CATI SYSTEM  
(Computer Assisted Telephone  
Interviewing)  
Recruitment by telephone



FIELDWORK PERIOD



TARGET

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



QUOTAS

COMPANY SIZE  
& SECTOR



SAMPLE

5865 | Europe  
1650 | Americas  
1107 | Rest of the world (TR,MA,AU,NZ)  
-----  
8622 | Interviews in total



DURATION OF  
INTERVIEW

20  
minutes  
on average

## READING NOTES ABOUT THE REPORT

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



XX

Significantly higher than  
2022 year

XX = score 2022



XX

Significantly lower than  
2022 year

XX = score 2022

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

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

# NUMBER OF INTERVIEWS CONDUCTED IN DENMARK

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



Companies with Less than 10 empl.  
**99 INTERVIEWS**



Companies with 10 - 99 empl.  
**62 INTERVIEWS**



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



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

**1 to 99  
employees  
161 INTERVIEWS**

**100 employees  
and more  
140 INTERVIEWS**

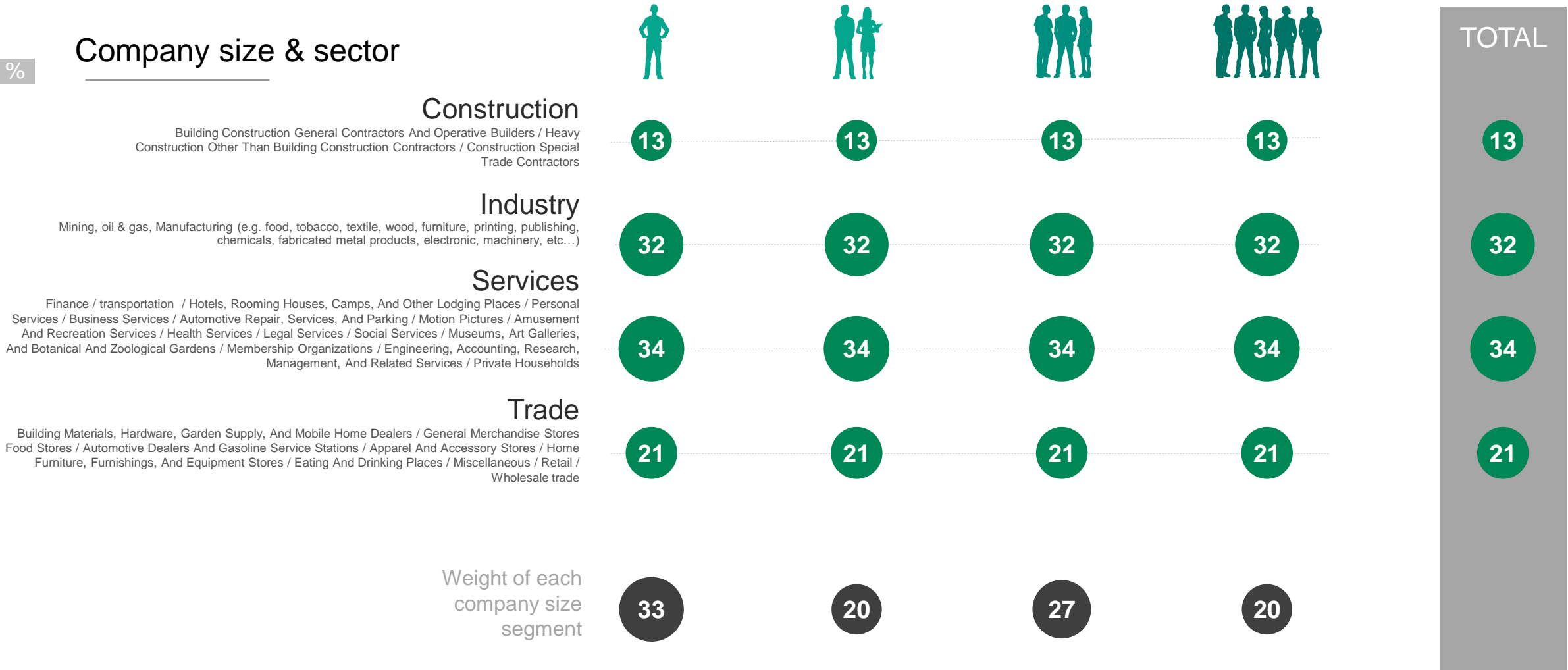


# SAMPLE STRUCTURE IN DENMARK



In %

## Company size & sector



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

# MOBILITY SOLUTIONS LIST AND DEFINITIONS



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



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



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



**AN APP TO BOOK MOBILITY SOLUTIONS PROVIDED BY THE COMPANY**



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



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



**PUBLIC TRANSPORT**



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



**CAR OR CASH ALLOWANCE** \*New item

2

# EXECUTIVE SUMMARY



# INSIGHT 1: MOST DANISH COMPANIES REMAIN CONFIDENT ABOUT THEIR FUTURE FLEETS, EVEN IF SOME SMALL COMPANIES ANTICIPATE A FLEET DECREASE

#1

## SOME OF THE SMALLEST COMPANIES EXPECT A FLEET DECREASE

- This year again, most **Danish companies expect a stable or an increasing fleet in the next 3 years.**
  - Despite an uncertain geopolitical and economical context, **the anticipated fleet growth is still mostly driven by business development.**
- But some of the smallest companies are also less optimistic about their business development and expect a **decreasing fleet for one fourth of them, ahead of the European average.**
- Regarding homeworking, it has definitely not impacted companies' mobility policy.
- Future challenges for Danish fleets in the next 3 years are focused on **adapting to restrictive public policies**, and on **managing longer vehicles' delivery time.**
- But for now, the Danish companies have not extended the **length of their vehicles' lifecycle** yet, which **remains shorter than the European average.** The biggest companies are even reducing it for their LCVs.

## INSIGHT 2: STABILITY IN TERMS OF ALTERNATIVE FUEL TECHNOLOGIES ADOPTION

#2

### GOOD IMPLEMENTATION OF ALTERNATIVE TECHNOLOGIES FOR PASSENGER CARS, NO PROGRESS FOR LCV

- Unlike the optimistic European trend, **Danish companies are rather conservative in 2023**, with no significant shift in terms of energy mix for their fleets.
- **For passenger cars, 6 companies out of 10 have adopted at least one alternative fuel technology.**
  - The energy mix is still dominated by **plug-in hybrids**, followed by 100% BEV and hybrids.
  - And the same energy mix is expected for the future fleets.
- This year, the reasons to electrify the passenger car fleets rely mainly on **environmental** and **economical considerations** in a context of rising fuel prices and higher concern about environment.
- **Regarding LCV, alternative technologies' adoption remains low.**
  - Below the European average.
  - And no progress is expected for future fleets, unlike the European average.
  - **Charging difficulties** (in public areas and at work) and **higher purchase prices remain strong barriers for 100% BEV adoption.**
  - To date, hydrogen fuel cell is marginal into the energy mix, without real growth potential in the coming years.



## INSIGHT 3: OPERATING LEASING IS BEHIND FINANCIAL LEASING AND OUTRIGHT PURCHASE

#3

### AND GROWTH POTENTIAL REMAINS QUITE LOW

- In 2023, financial leasing and outright purchase are the main financing methods in Denmark.
- Only **20% of Danish companies declare using operating leasing** to finance their fleet.
- 1 company out of 5 intends to introduce or increase the use of operating leasing, below the European average.

## INSIGHT 4: DANISH COMPANIES ARE IN THE EUROPEAN AVERAGE IN TERMS OF MOBILITY SOLUTIONS IMPLEMENTATION

#4

### GOOD LEVEL OF USAGE FOR ALTERNATIVE MOBILITY SOLUTIONS

- The adoption of mobility solutions is widespread in 2023.
  - With 7 companies out of 10 that have already adopted at least one mobility solution, **Denmark positions at the same level as the European average.**
  - This development is **driven by the smallest companies** which are in line with large companies.
  - These small companies are this year especially enthusiastic about corporate car sharing and mobility app.

## INSIGHT 5: AN INCREASING USE OF TELEMATICS IN ORDER TO LOCATE VEHICLES AND IMPROVE VEHICLE SAFETY

#5

- **As for telematics, Danish fleets are almost as well equipped as the European average.**
  - In 2023, almost **40% of Danish companies** have turned towards connected vehicles.
  - **Passenger cars equipment's level has indeed caught up with LCV's one.**
  - For both passenger cars and LCVs, the main reason for telematics adoption is the **vehicle's security**.
  - Then, small companies are more interested in reducing fleet costs, whereas large companies rather focus on drivers' safety and behaviours.

3

# WHAT ARE THE MAIN CHARACTERISTICS OF THE FLEETS?



# MOST DANISH COMPANIES REMAIN CONFIDENT ABOUT THEIR FUTURE FLEETS, EVEN SOME SMALL COMPANIES ANTICIPATE A FLEET DECREASE

1

- In 2023, most Danish fleets keep growing, with 84% of companies expecting from their fleet to remain stable or increase. This expected growth is firstly induced by **business development** (77%), and to a lesser extent by **increased HR related needs** (42%) and **more widespread mobility solutions through salary sacrifice** (36%), in line with the European trend.

2

- At the same time, there is also a **slow down of fleet potential growth by some of the smallest companies**, in line with the European trend : 25% of them consider that their fleet will decrease (versus 4% in 2022), mainly because of **business declining** (51%). Homeworking and evolving mobility policies are also mentioned by fleet managers.

3

- Confirming last year's tendency, **the development of homeworking has low effect on companies' mobility policy**, with 92% of companies which don't consider any adjustment of their mobility policy.

4

- According to most Danish companies, future challenges for the fleets in the next 3 years are focused on **adapting to restrictive public policies** (about petrol and diesel vehicles or about low emission zones in urban areas), and on **managing longer vehicles' delivery time**.

5

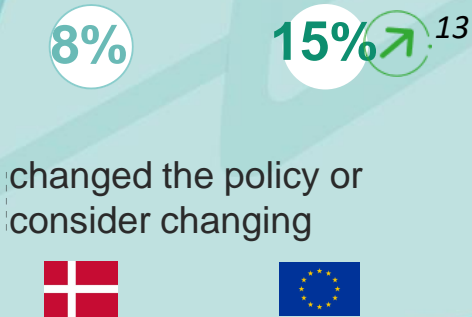
- But for now, Danish companies have not extended the **length of their vehicles' lifecycle** yet, which **remains shorter than the European average**. The largest companies are even reducing it for their LCVs.



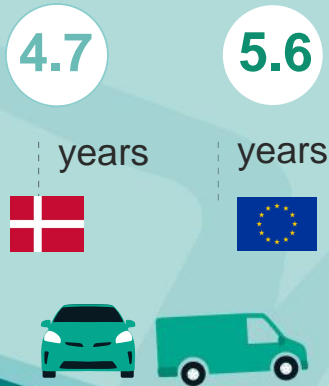
# FLEET PROFILE



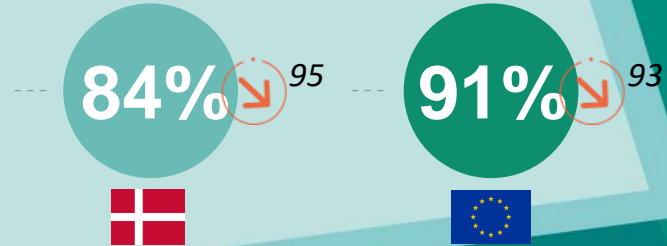
MOBILITY POLICY  
ADAPTATION  
COINCIDING WITH  
HOMEWORKING



FLEET POSSESSION  
LENGTH



ANTICIPATED  
FLEET EVOLUTION  
(% will increase or remain stable)



# RESPONDENTS POSITION WITHIN THE COMPANY

In %



Passenger cars + LCVs



CEO / Managing director

30

28

Fleet director / manager

14

18

Procurement director / manager

7

11

Finance director / officer /  
manager / CFO

12

10

HR director/ manager

6

8

COO (Chief Operations Officer)

5

8

CSR director / officer / manager

15

5

Facility manager

4

5

Mobility manager

2

3

Other, please specify

5

5

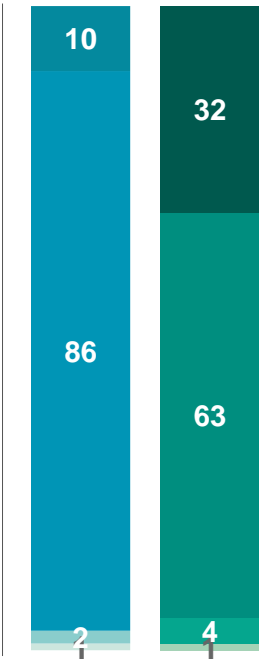
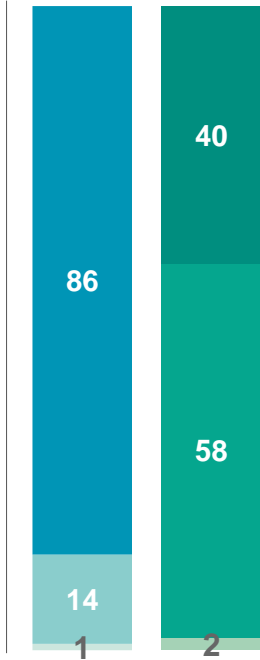
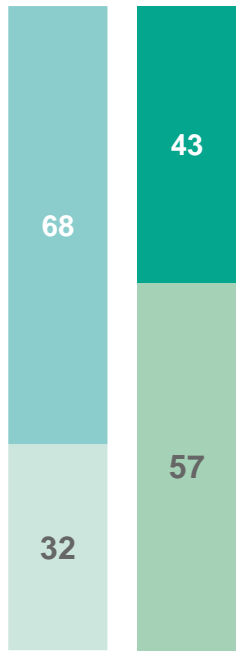
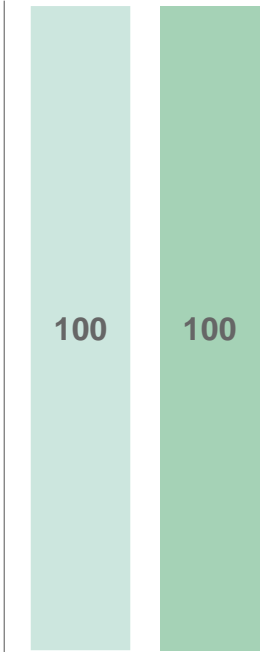
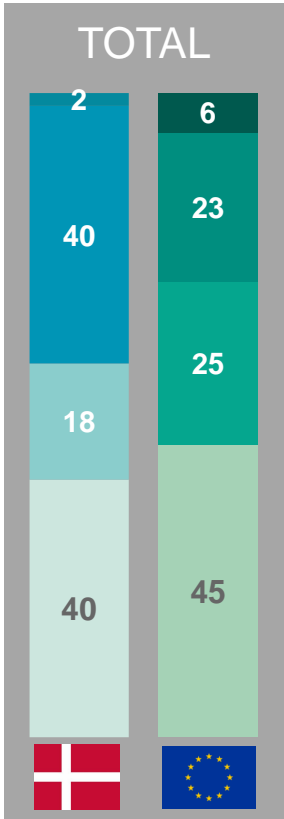
# NUMBER OF VEHICLES IN FLEET

In %



Passenger cars + LCVs

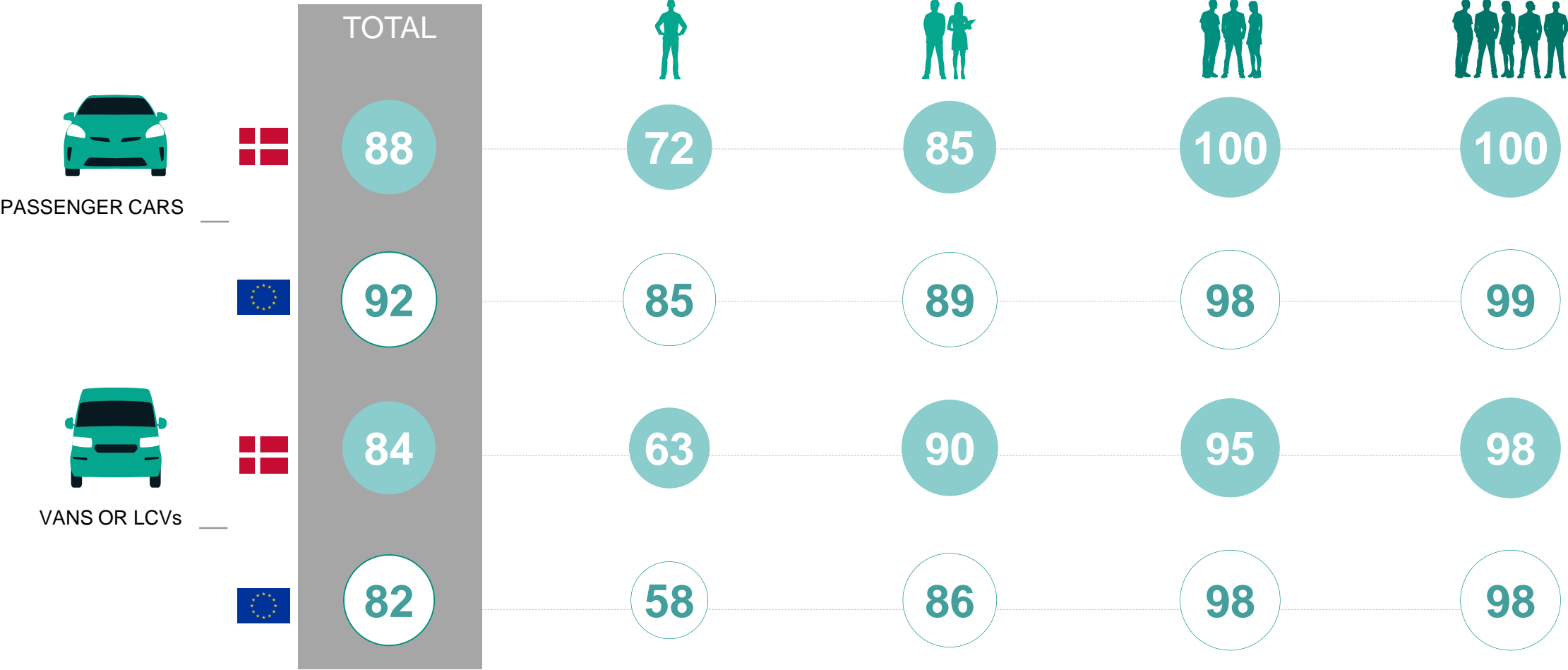
- 1000 vehicles and more
- 100 to 999 vehicles
- 10 to 99 vehicles
- 1 to 9 vehicles



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

(among companies with at least one vehicle in fleet)

In %



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

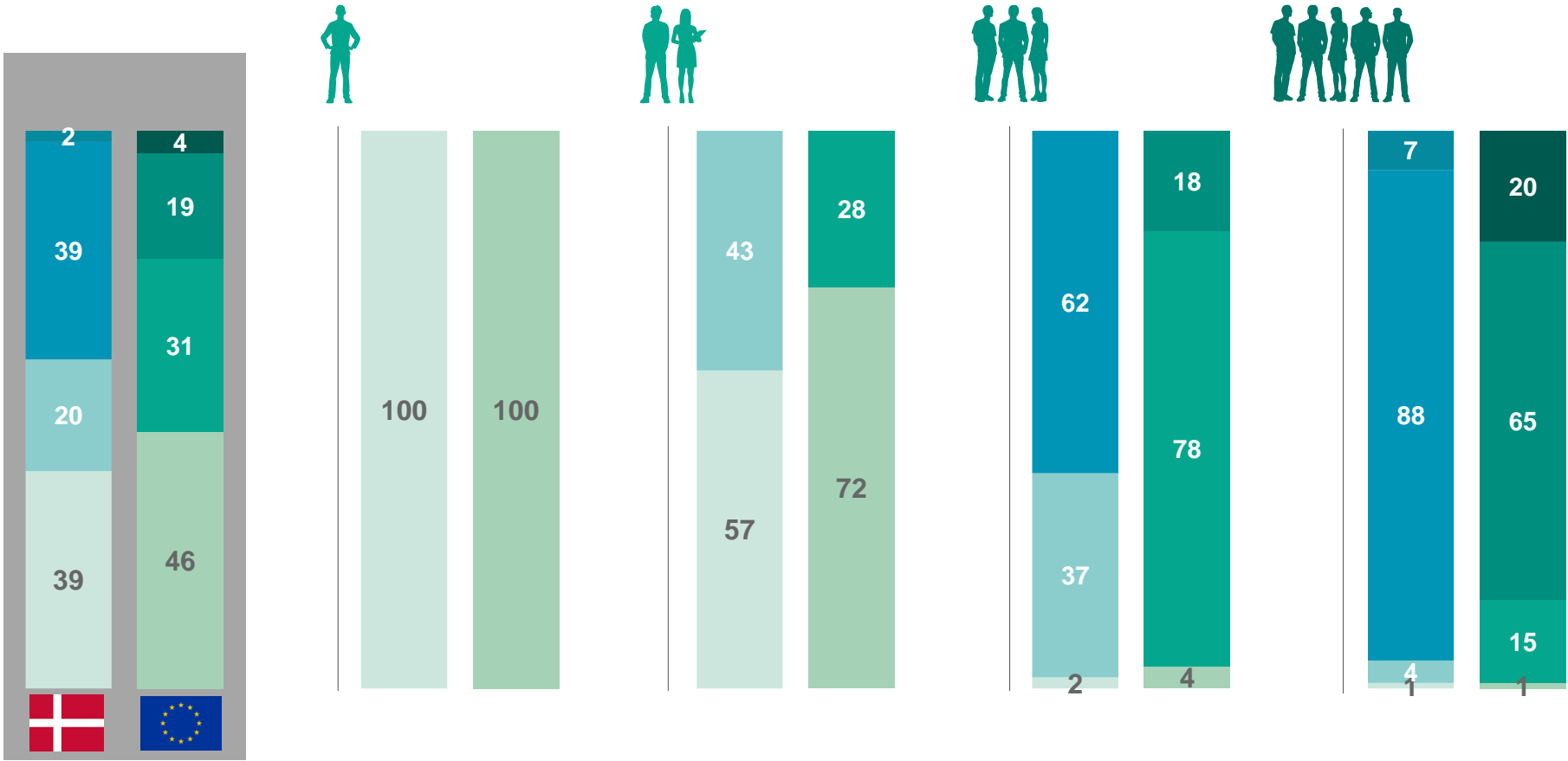
# NUMBER OF PASSENGER CARS IN FLEET

In %



Passenger cars

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



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



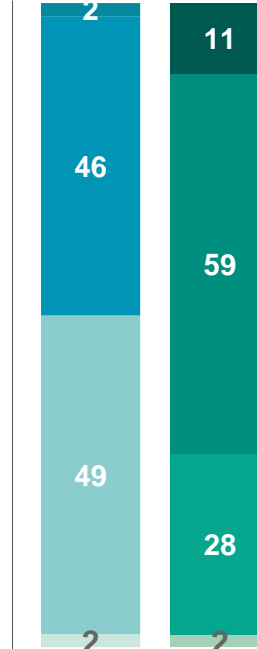
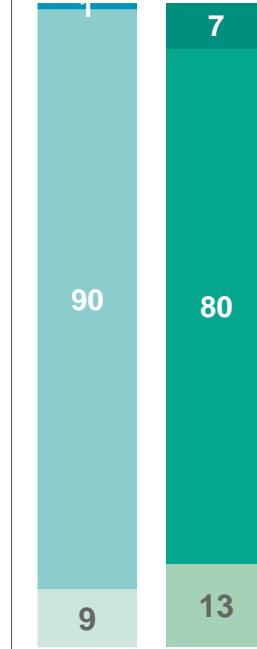
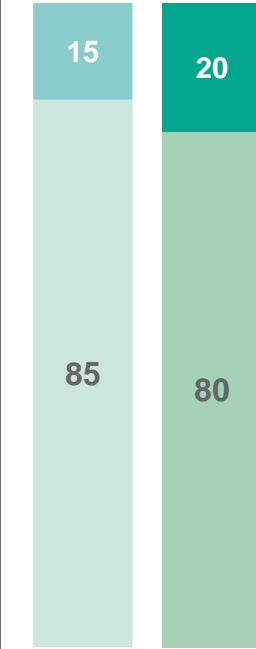
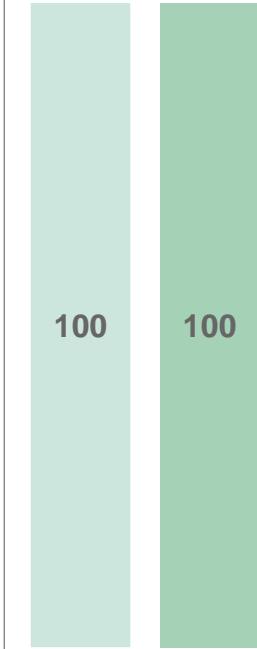
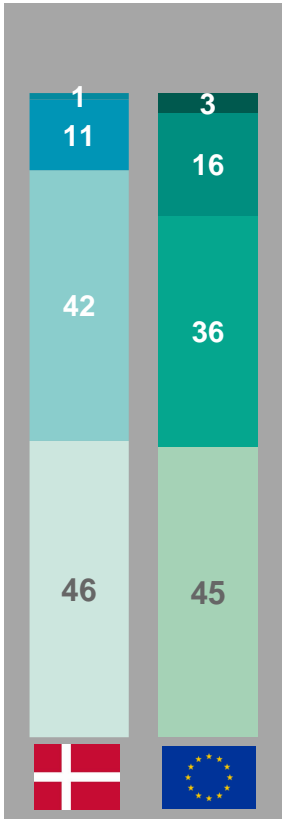
# NUMBER OF LCVs IN FLEET

In %



LCVs

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



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

# VEHICLES POSSESSION LENGTH



Passenger cars + LCVs

AVERAGE IN YEARS



TOTAL

4.7

5.6



4.6

5.6



4.7

5.7



5.1

5.6



4.3

5.6

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

# PASSENGER CARS POSSESSION LENGTH



New question added in 2023  
And how long do you keep your passenger cars (before being sold or returned to the leasing company)?  
Basis: companies with passenger cars

# LCVS POSSESSION LENGTH



LCVs

AVERAGE IN YEARS



TOTAL

4.9

5.8



5

5.8



5

5.9



5.2

5.7

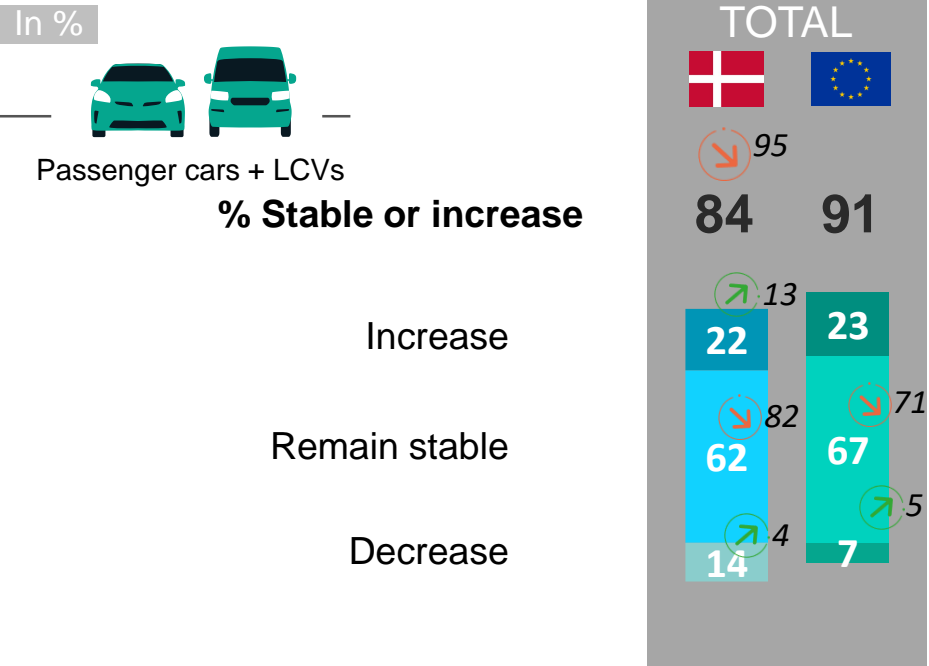


4.5

6

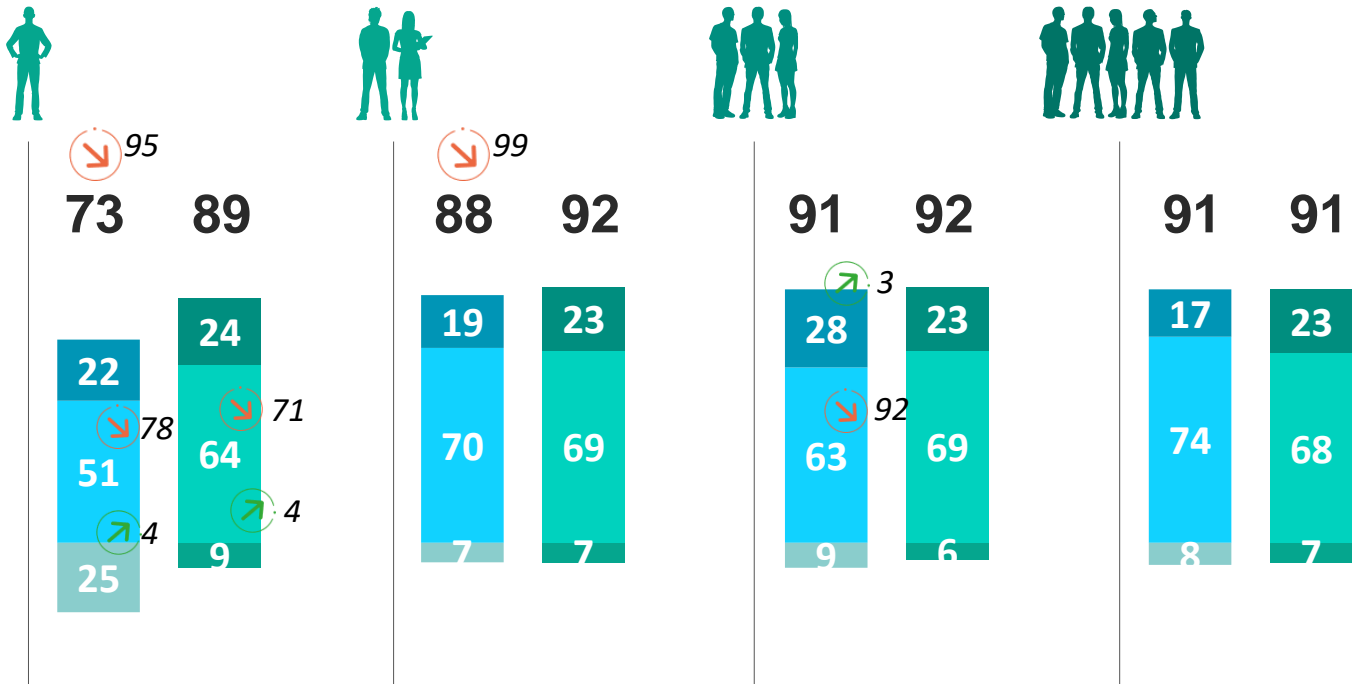
5.7

# FLEET GROWTH POTENTIAL



## HOW TO READ THE RESULTS ?

In Denmark, 84% of the companies declare that in the next 3 years their company fleet will remain stable or increase.



BALANCE in pts (INCREASE ⊖ DECREASE)

2023	+8	+16	-3	+15	+12	+16	+19	+17	+9	+16
2022	+10	+18	+12	+19	+16	+17	+2	+17	+9	+17
2021	+44	+35	+37	+22	+17	+31	+64	+43	+55	+50

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



# FLEET GROWTH POTENTIAL

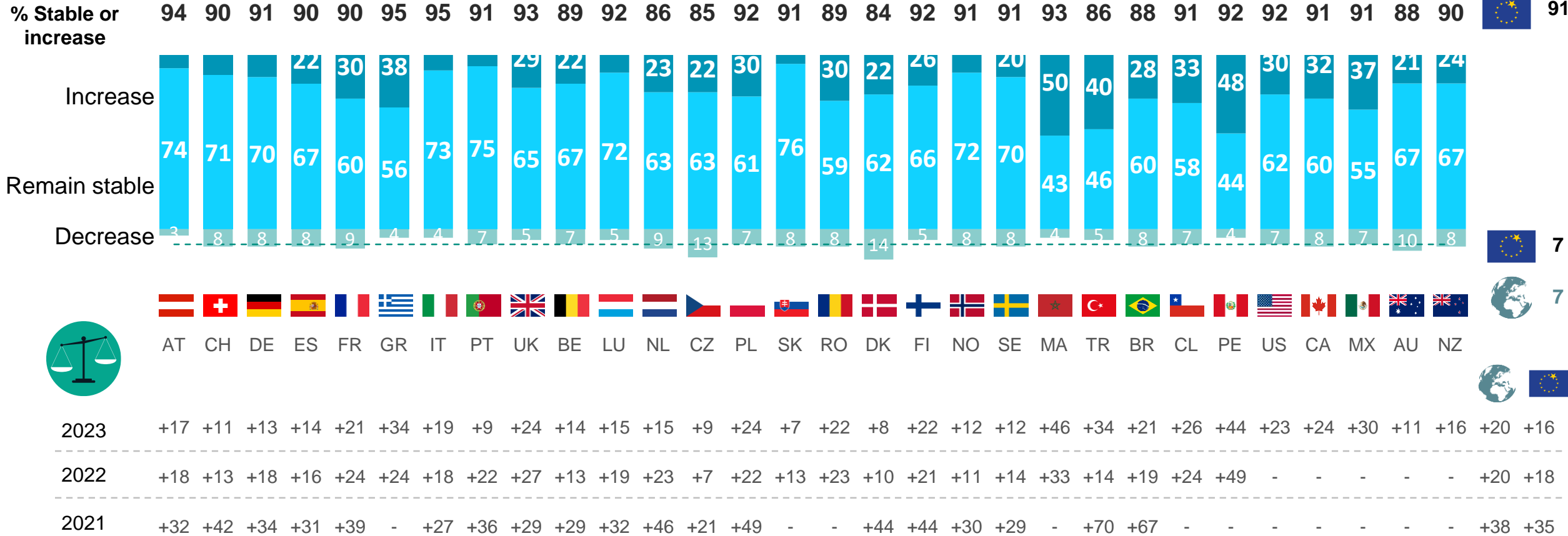
In %



Passenger cars + LCVs

## HOW TO READ THE RESULTS ?

In Denmark 84% of the companies declare that in the next 3 years their company fleet will remain stable or increase.



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

# PASSENGER CAR FLEET GROWTH POTENTIAL

In %



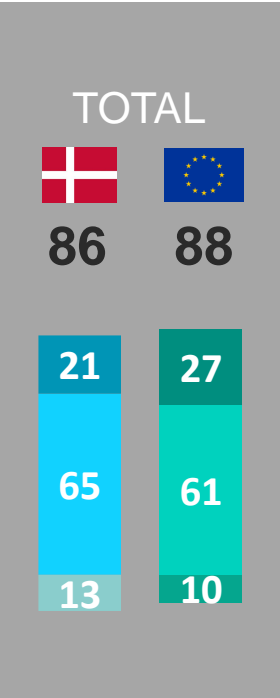
Passenger cars

% Stable or increase

Increase

Remain stable

Decrease



## HOW TO READ THE RESULTS ?

In Denmark, 86% of the companies declare that in the next 3 years the total number of passenger cars will remain stable or increase.



73

88

91

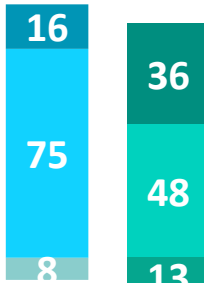
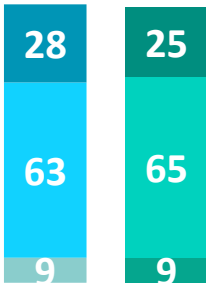
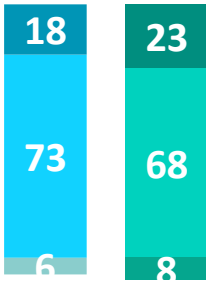
91

91

90

91

84



BALANCE in pts (INCREASE ⊖ DECREASE)

2023

+8 +17

-7 +16

+11 +15

+19 +17

+8 +22

New question added in 2023

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

Basis: companies with passenger cars

# PASSENGER CAR FLEET GROWTH POTENTIAL

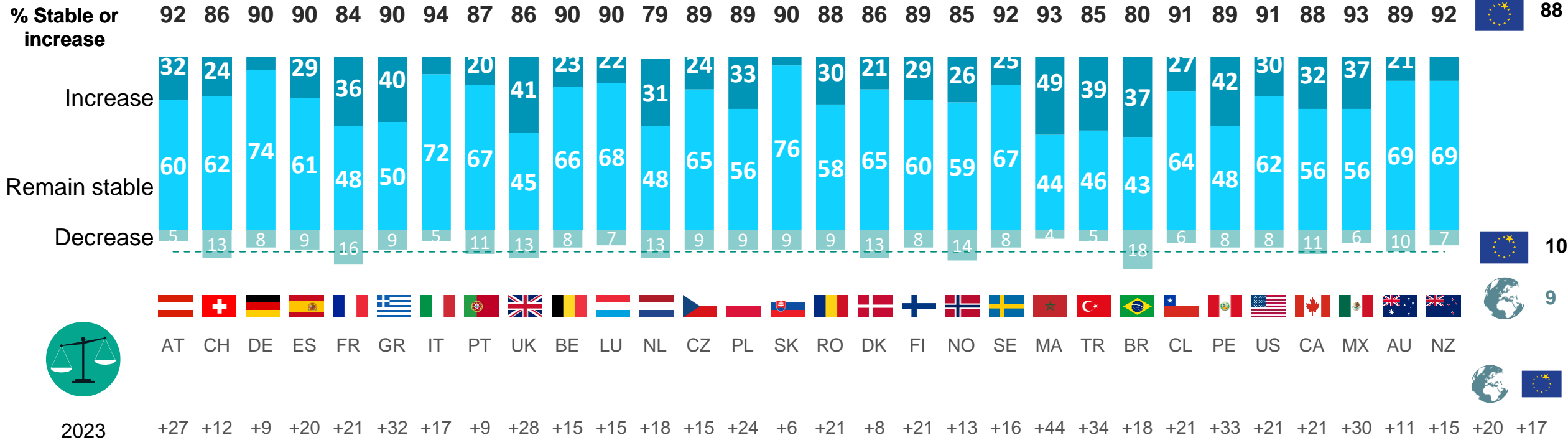
## HOW TO READ THE RESULTS ?

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

In %



Passenger cars



88

88

10

9

+20 +17

New question added in 2023  
In the next three years, do you think that the total number of your passenger cars will...  
Basis: companies with passenger cars

# LCVS FLEET GROWTH POTENTIAL

In %



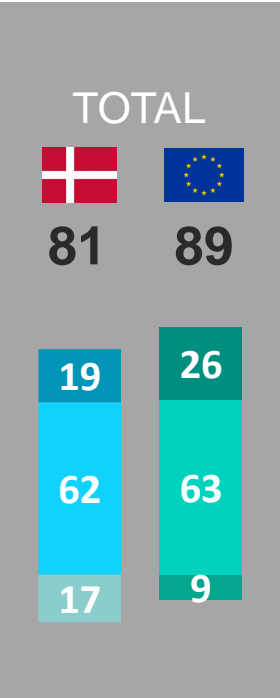
LCVs

% Stable or increase

Increase

Remain stable

Decrease



## HOW TO READ THE RESULTS ?

In Denmark, 81% of the companies declare that in the next 3 years the total number of LCVs will remain stable or increase.



66

88

89

91

90

92

80

86

11

30

17

23

28

23

18

28

54

58

71

68

62

68

63

58

32

11

6

7

10

6

19

12

BALANCE in pts (INCREASE ⊖ DECREASE)

2023

+3 +17

-20 +19

+11 +15

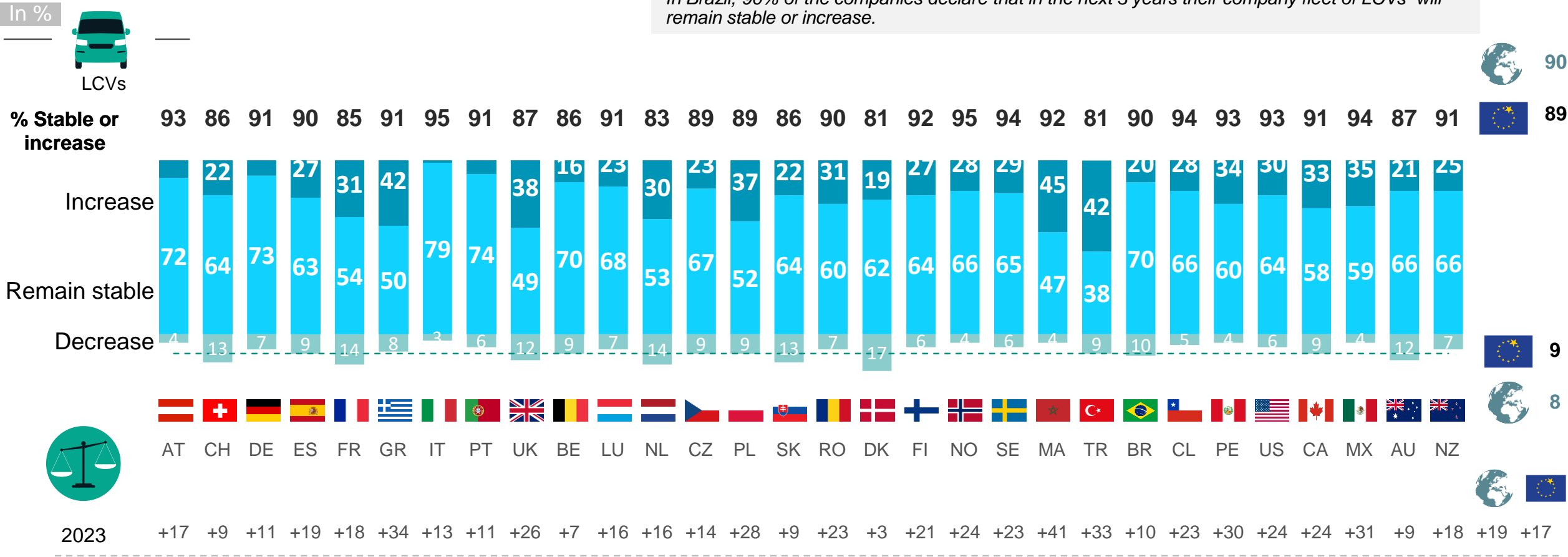
+18 +17

-1 +17

# LCVS FLEET GROWTH POTENTIAL

## HOW TO READ THE RESULTS ?

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



New question added in 2023

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

Basis: companies with LCVs

# REASON FOR FUTURE FLEET INCREASE



In %



Passenger cars + LCVs

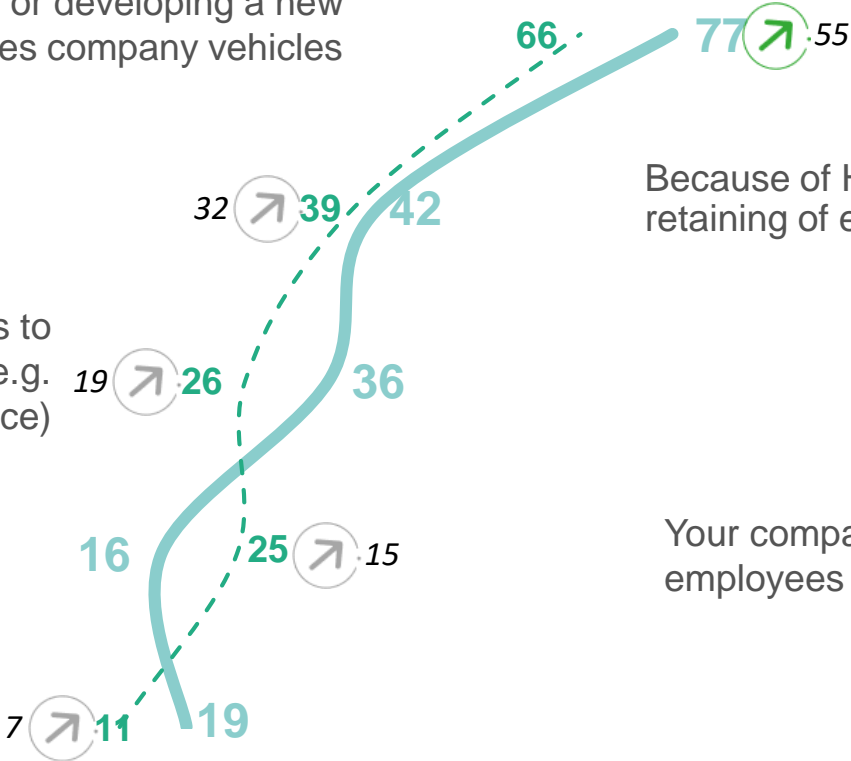
Because your company is growing or developing a new activity that requires company vehicles

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

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

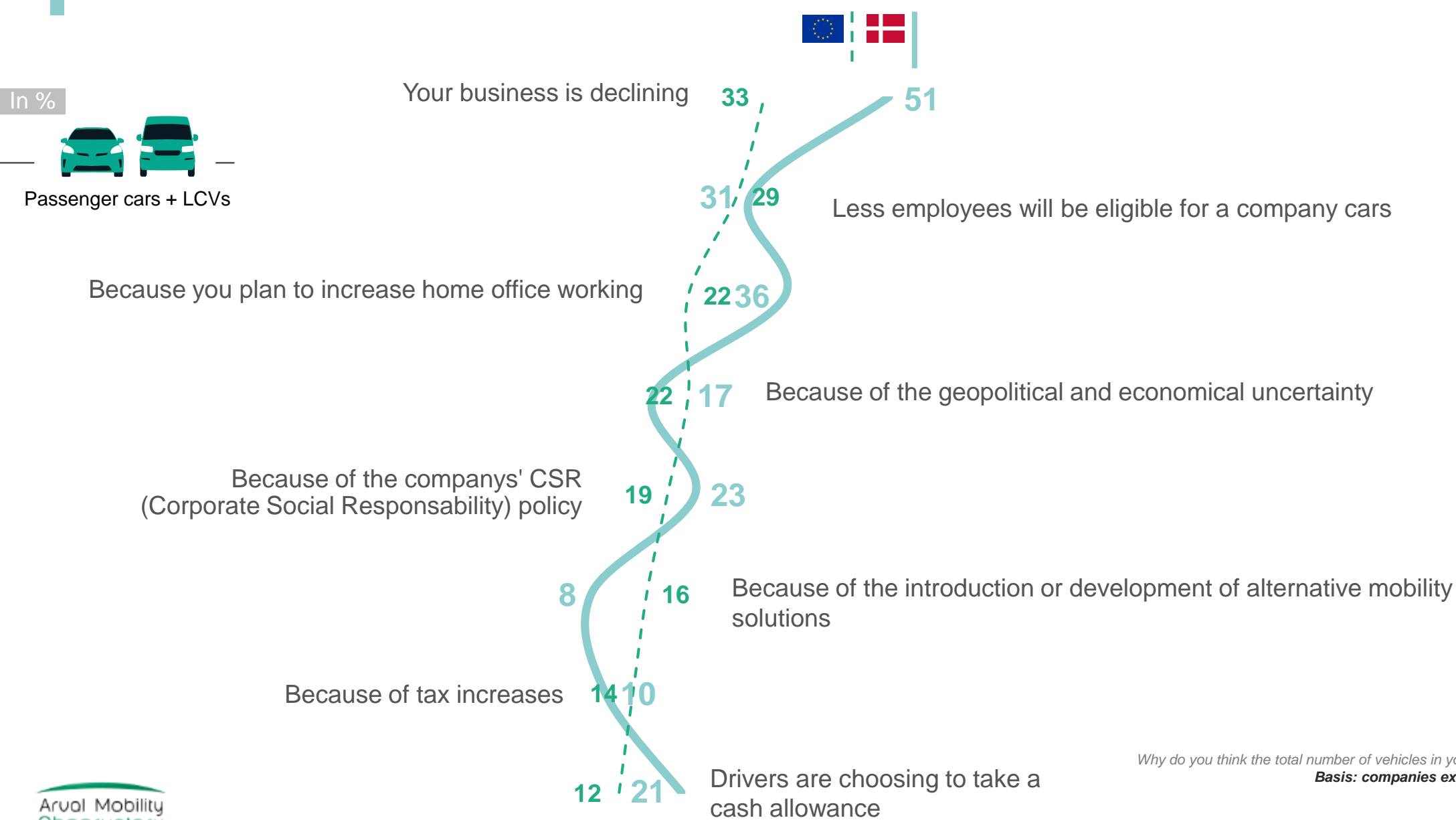
Your company plans to propose shared vehicles to employees (car sharing)

Because of tax decreases



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

# REASON FOR FUTURE FLEET DECREASE



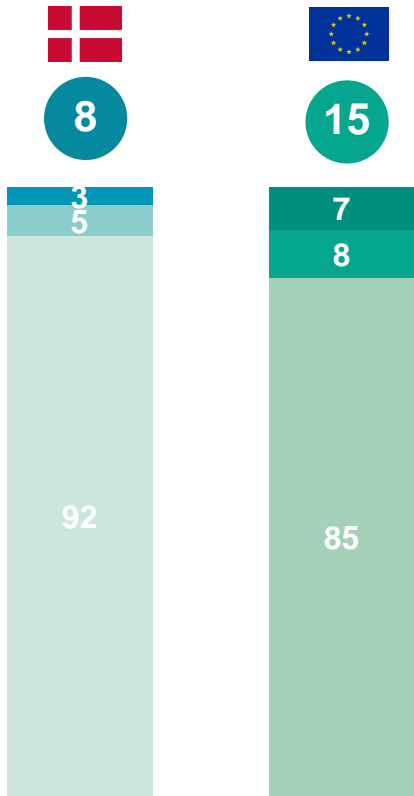
Why do you think the total number of vehicles in your company fleet will decrease?  
Basis: companies expecting a decrease of the fleet

# MOBILITY POLICY ADAPTATION COINCIDING WITH HOMEWORKING

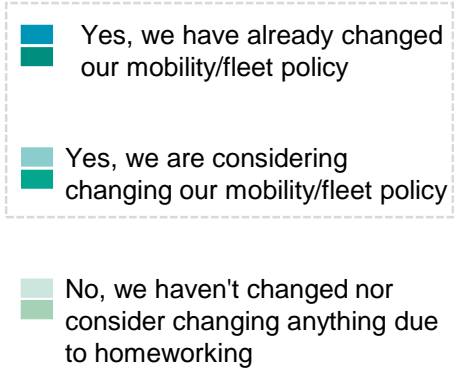
In %



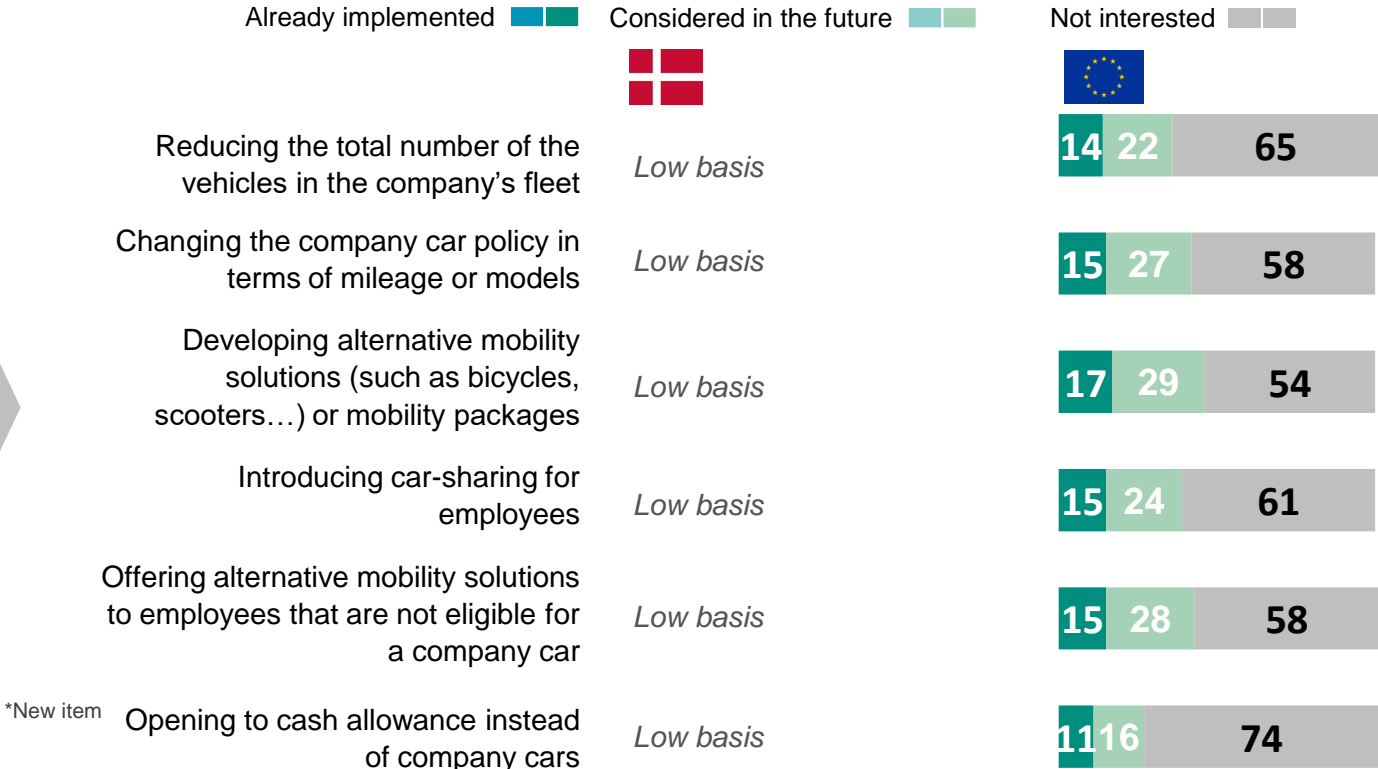
Passenger cars + LCVs



NET CHANGED THE POLICY  
OR CONSIDER CHANGING



HOW TO READ THE RESULTS ?  
In Europe, among the companies that changed or consider changing their mobility policy, 14% 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

This question has been asked differently in 2023.

With regards to the development of homeworking, have you changed, or do you consider changing your mobility/fleet policy?

And among the following changes, can you please select those you have implemented or consider implementing with regards to the development of homeworking?

Question asked to respondents that are aware of mobility solutions



# MOST IMPORTANT CHALLENGES EXPECTED

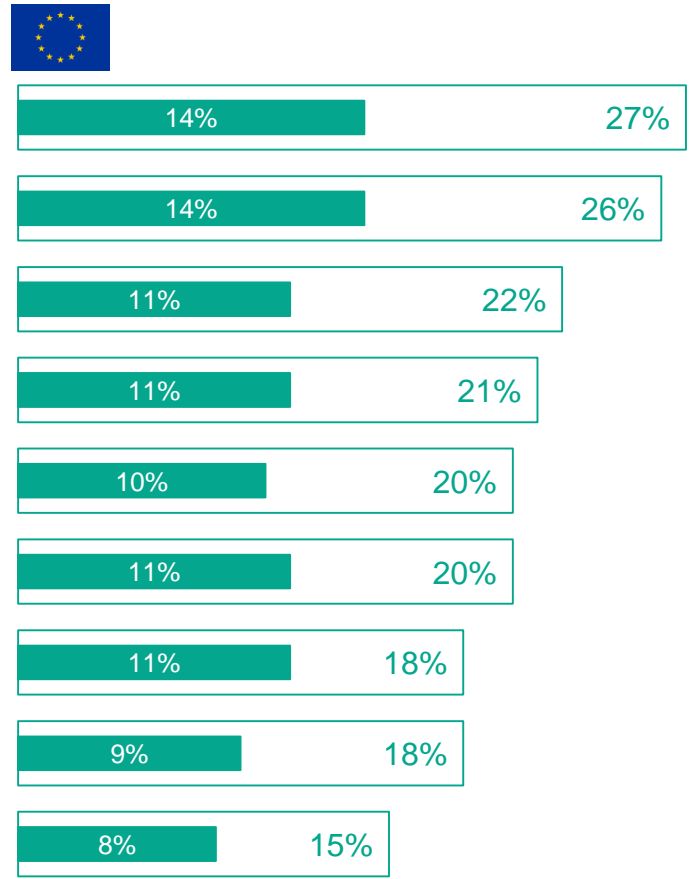
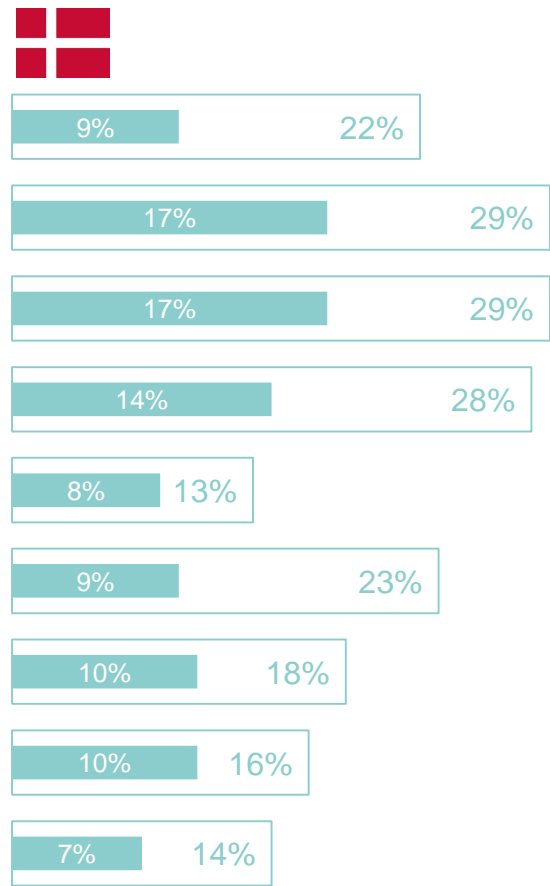
In %

  
Passenger cars + LCVs

Nb 1 challenge

 Top 3 challenges

- Implementing alternative fuel technologies (100% electric vehicles, hybrids, rechargeable hybrids)
- Adapting to restrictive public policies on petrol and diesel vehicles
- Managing longer vehicles' delivery time
- Adapting to the expansion of low emission zones in urban areas
- Mitigating the increase of total cost of ownership of the vehicles
- Inducing more responsible driving among employees
- Adjusting to new ways of working (hybrid between home and office)
- Adapting to evolutions of car selling models (ex. directly from manufacturer without buying through car dealer)
- Implementing other mobility solutions (ex. car sharing, bikes...)



New question added in 2023

We will now ask you to rank these challenges by order of importance. According to you, what is the most important challenge for the fleet management in the next three years ? And what is the second most important challenge ?

Basis: companies with corporate vehicles = 100%

4

# HOW ARE COMPANIES FINANCING THEIR FLEET?



# OPERATING LEASING IS BEHIND FINANCIAL LEASING AND OUTRIGHT PURCHASE

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

1

- In 2023, **financial leasing and outright purchase are the main financing methods** in Denmark.

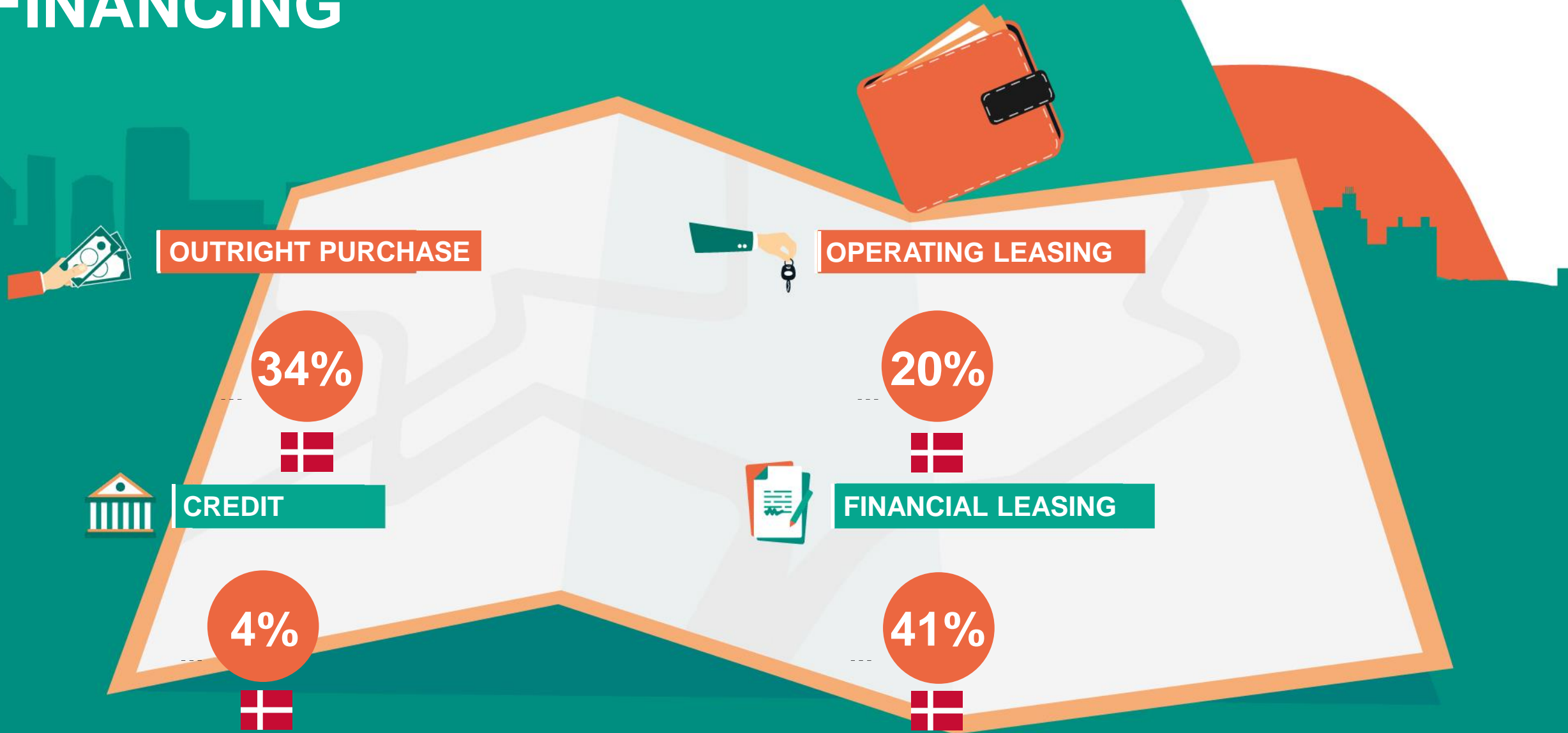
**Only 20% of Danish companies declare using operating leasing** to finance their fleet :

- 24% for passenger cars fleet
- 16% for LCVs fleet

2

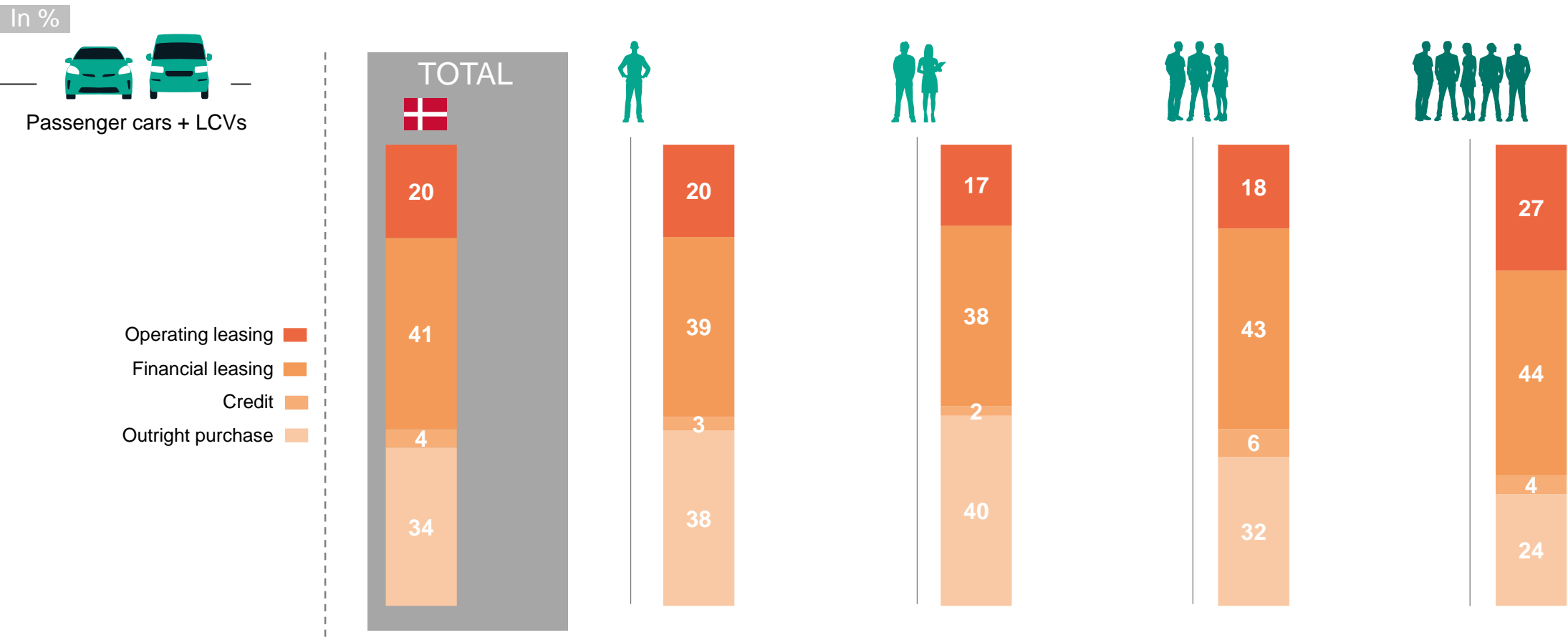
- Similarly to last year, **1 company out of 5 intends to introduce or increase the use of operating leasing**, below the European average.

# FINANCING



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

# MAIN FLEET FINANCING METHOD



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

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

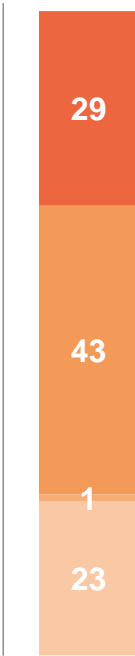
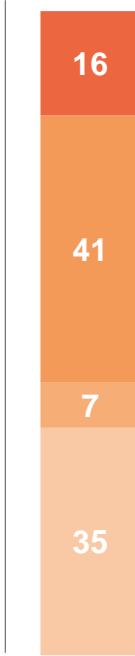
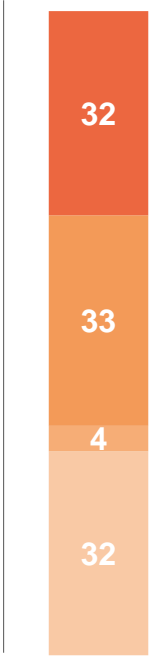
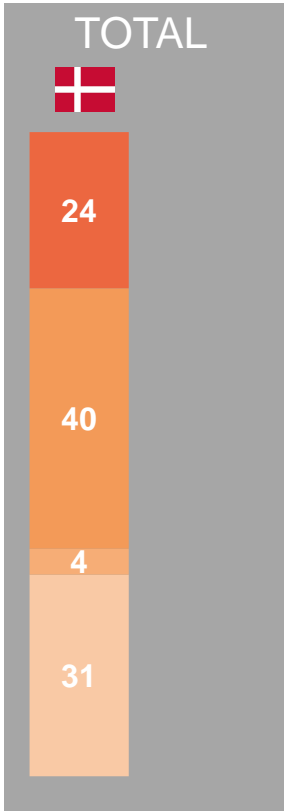
# MAIN PASSENGER CARS FINANCING METHOD

In %



Passenger cars

- Operating leasing
- Financial leasing
- Credit
- Outright purchase



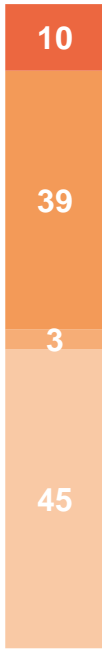
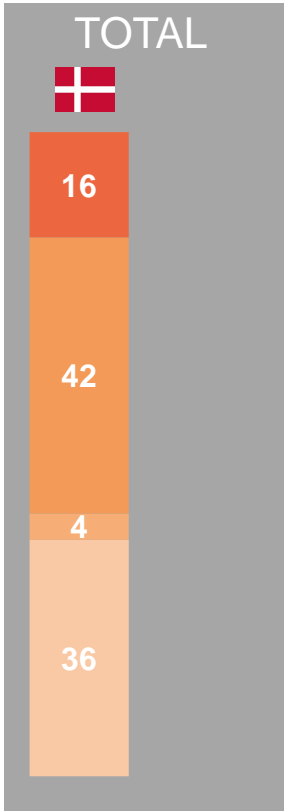
# MAIN LCV FINANCING METHOD

In %



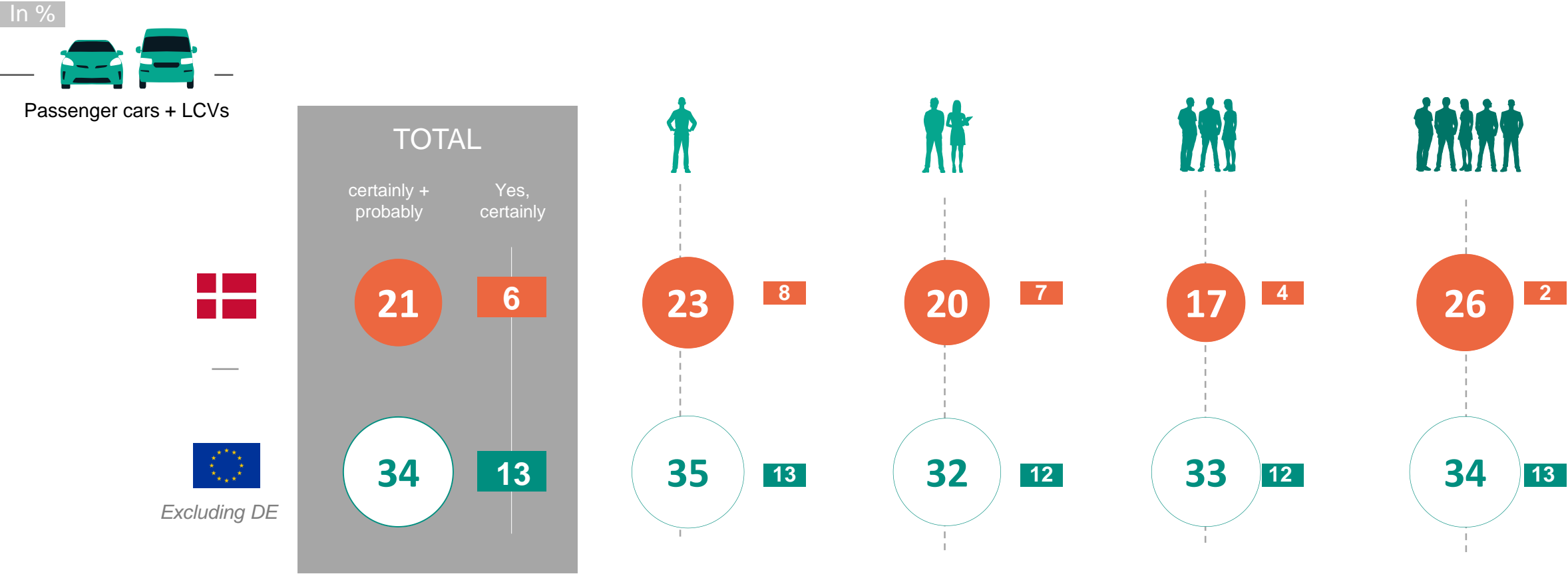
LCVs

- Operating leasing
- Financial leasing
- Credit
- Outright purchase



# INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATING LEASING

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

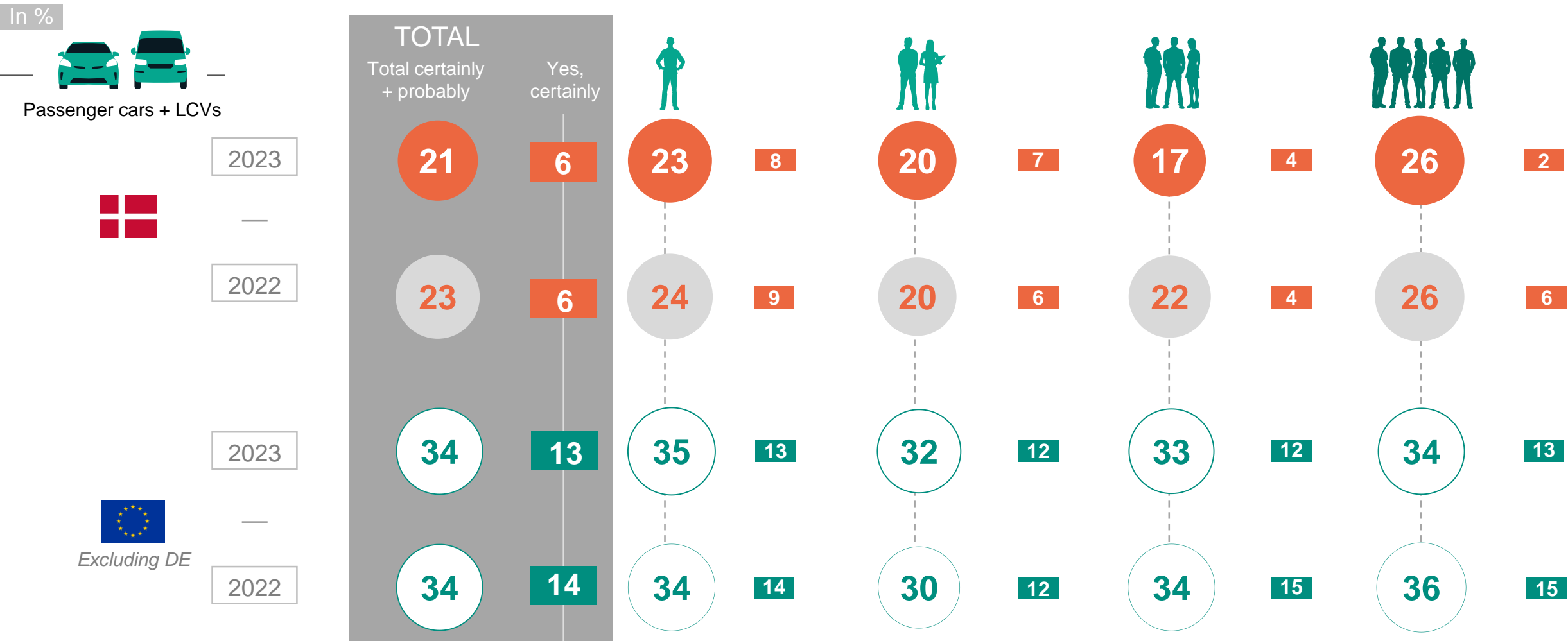


*\*All countries except DE: In the next three years do you intend to introduce or increase use of Operating Lease to finance your corporate fleet?  
Basis: companies with corporate vehicles = 100%*



# INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATING LEASING

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



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

5

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



# STABLE SITUATION : GOOD IMPLEMENTATION OF ALTERNATIVE TECHNOLOGIES FOR PASSENGER CARS, NO PROGRESS FOR LCV

1

- In 2023, more than half of companies have already adopted at least one alternative fuel technology for their passenger cars, which is stable compared to last year.

In advance last year, Denmark has been caught up by other European countries.

2

- Energy mix for passenger cars is still dominated by plug-in hybrids (30%), followed by 100% BEV (21%) and hybrids (20%). And the same expected energy share is expected for the future fleets.

3

- In a context of increasing energy prices and higher concern about environment, the reasons to turn towards these alternative technologies are this year more focused on **environmental and economical reasons** (reducing fuel expenses and interesting total cost of ownership), rather than on corporate reputation or social responsibility.

4

- Regarding LCV, alternative technologies' adoption remains low, below the European average, and **no progress is expected** for future fleets, unlike the European average.

**Indeed, access to charging points** (whether in the public area or at work) and **higher purchase prices remain strong barriers**.

5

- Lastly, **hydrogen fuel cell adoption is very low for LCVs and shows little potential**, as only 7% of Danish companies are already using or consider using this fuel technology in the next three years.

# ENERGY MIX



AT LEAST ONE ALTERNATIVE  
IMPLEMENTED OR CONSIDERED\*

for Passenger cars

ALREADY  
USING OR  
CONSIDER  
USING IN THE  
NEXT 3 YEARS

77%



77%



66



AT LEAST ONE ALTERNATIVE  
IMPLEMENTED

for Passenger cars

56%



58%



48



EXPECTED PART OF 100%  
ELECTRIC PASSENGER CAR IN 3 YEARS

13%



20%



EXPECTED PART OF 100%  
ELECTRIC LCV IN 3 YEARS

2%



13%

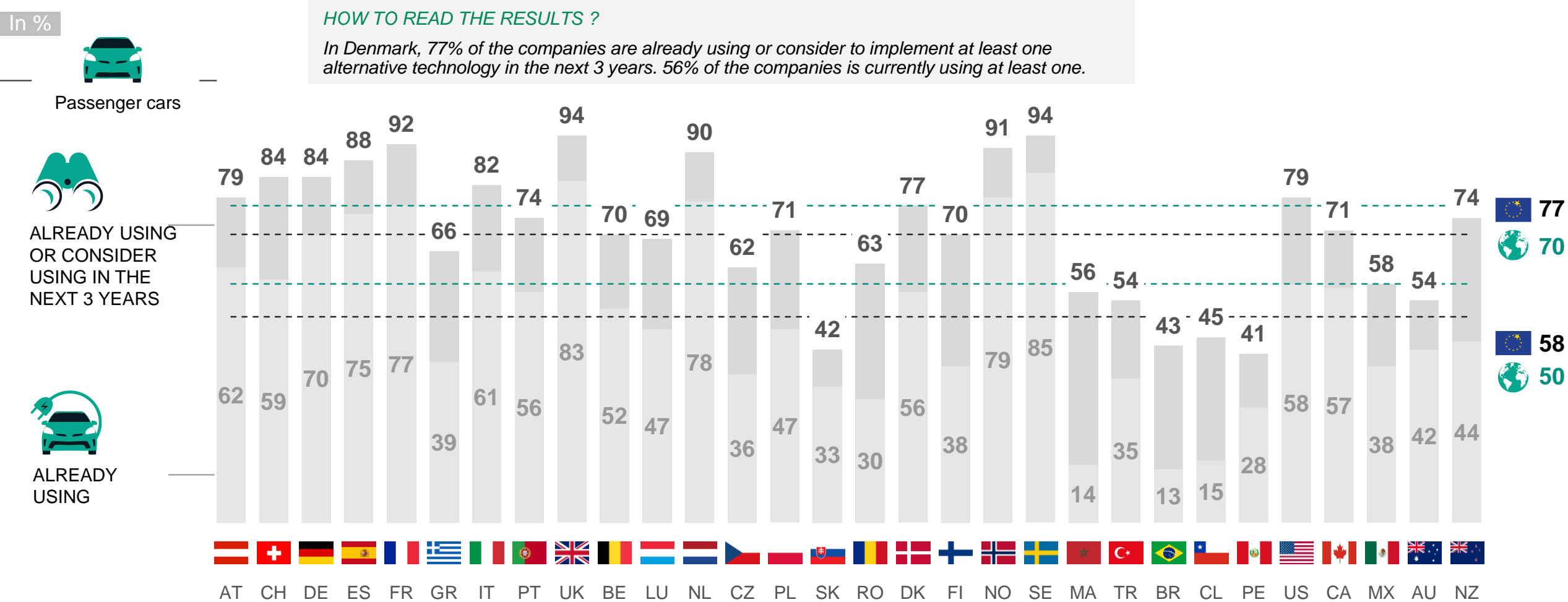


\*LIST OF ENERGIES: Hybrid, Plug-in Hybrid, 100% Battery Electric Vehicle

This question has been asked differently in 2023

# CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

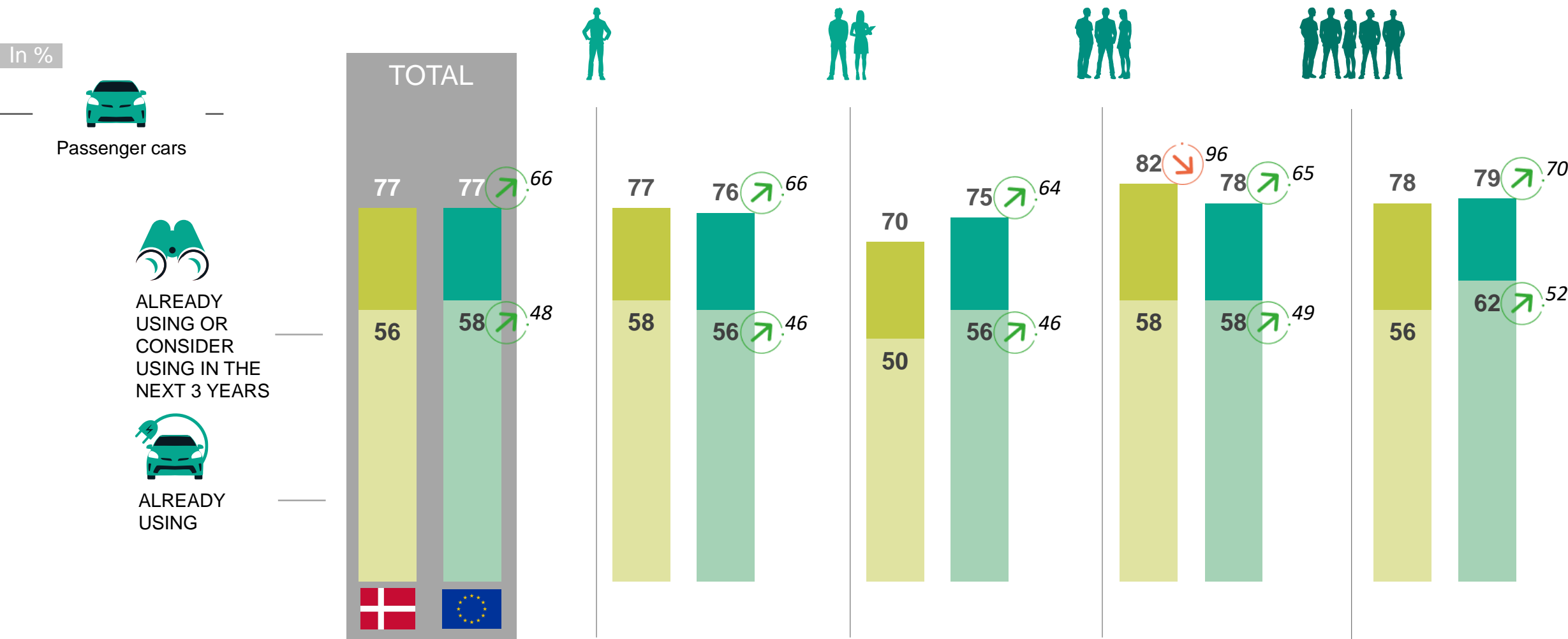
(At least one technology among HEV, PHEV and 100% BEV)



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

# CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

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



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

# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years

In %



Passenger cars



ALREADY USING OR  
CONSIDER USING IN  
THE NEXT 3 YEARS

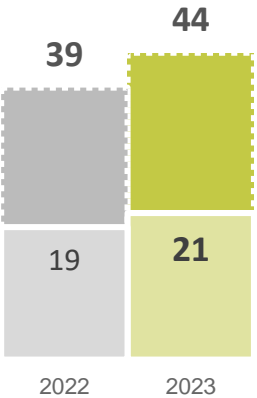
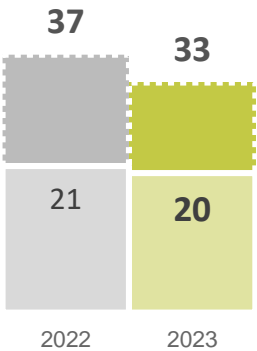
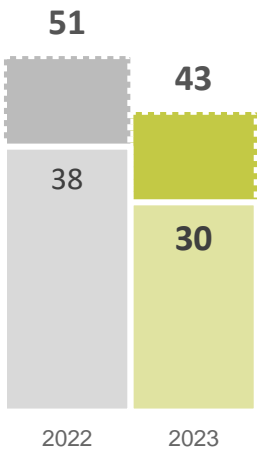


ALREADY  
USING

Plug-in Hybrid

Hybrid

100% Battery  
Electric Vehicle



37	44	↗
24	29	↗

38	44	↗
26	29	↗

34	40	↗
19	24	↗

# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

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

In %



Passenger cars



ALREADY USING OR  
CONSIDER USING IN  
THE NEXT 3 YEARS



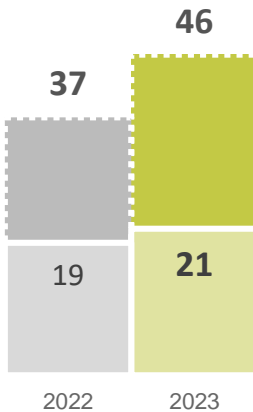
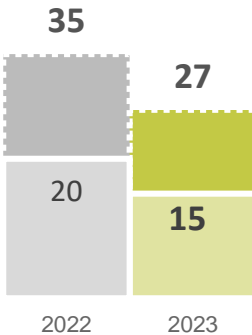
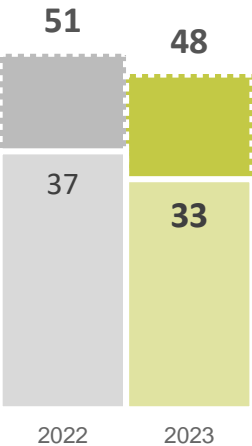
ALREADY  
USING



Plug-in Hybrid

Hybrid

100% Battery  
Electric Vehicle



36	44	↗
22	30	↗

36	42	↗
25	27	

32	39	↗
18	22	↗



# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

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

In %



Passenger cars



ALREADY USING OR  
CONSIDER USING IN  
THE NEXT 3 YEARS



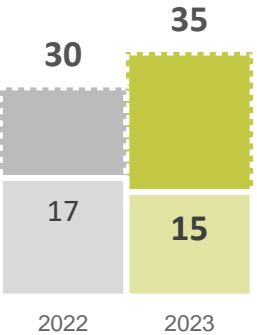
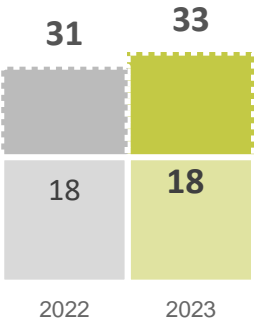
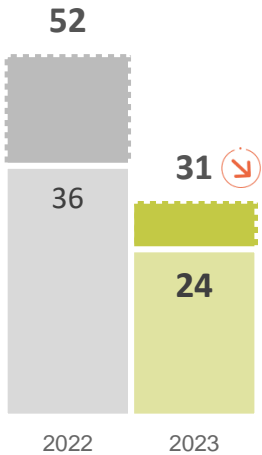
ALREADY  
USING



Plug-in Hybrid

Hybrid

100% Battery  
Electric Vehicle



37 42 (up arrow)

23 26

38 44 (up arrow)

25 28

34 39 (up arrow)

18 22 (up arrow)

# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

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

In %



Passenger cars



ALREADY USING OR  
CONSIDER USING IN  
THE NEXT 3 YEARS



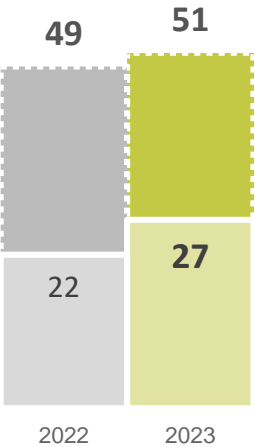
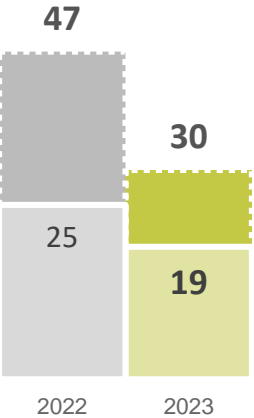
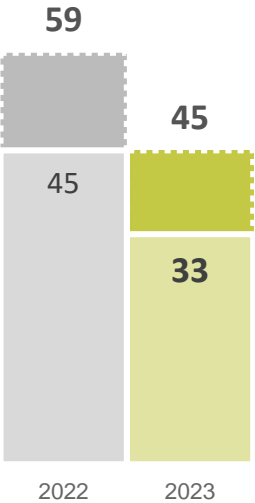
ALREADY  
USING



Plug-in Hybrid

Hybrid

100% Battery  
Electric Vehicle



37	44
26	29

40	43
28	31

35	42
20	24

# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

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

In %



Passenger cars



ALREADY USING OR  
CONSIDER USING IN  
THE NEXT 3 YEARS



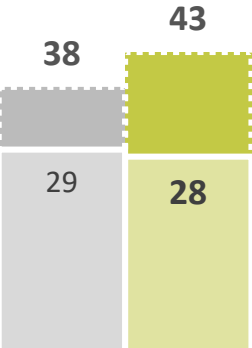
ALREADY  
USING



Plug-in Hybrid

Hybrid

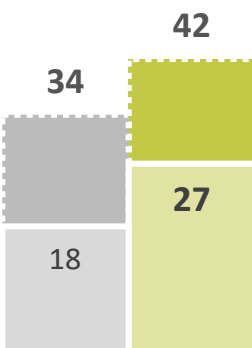
100% Battery  
Electric Vehicle



2022 2023

40 46

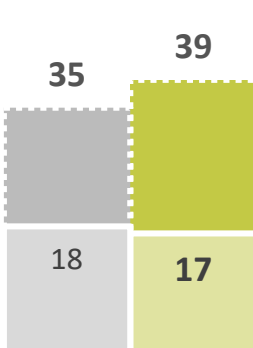
27 32



2022 2023

40 46

28 33



2022 2023

37 40

22 26

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

**Basis: companies with passenger cars**

# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years – Focus on 1 to 99

In %



Passenger cars



ALREADY USING OR  
CONSIDER USING IN  
THE NEXT 3 YEARS



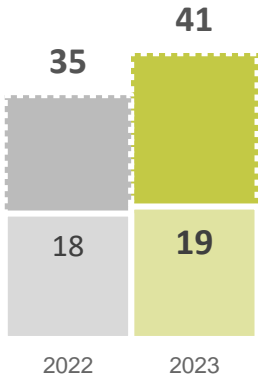
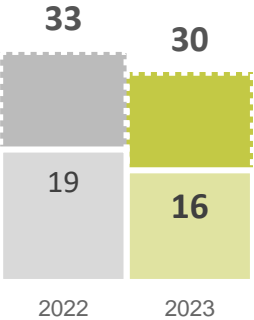
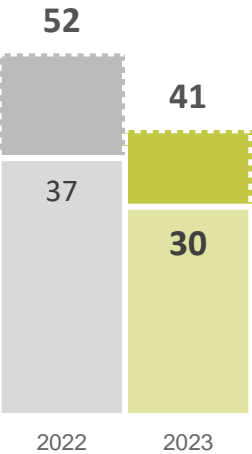
ALREADY  
USING



Plug-in Hybrid

Hybrid

100% Battery  
Electric Vehicle



37 43 ↗  
22 28 ↗

37 43 ↗  
25 27

33 39 ↗  
18 22 ↗

# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years – Focus on 100 and more

In %



Passenger cars



+



ALREADY USING OR  
CONSIDER USING IN  
THE NEXT 3 YEARS



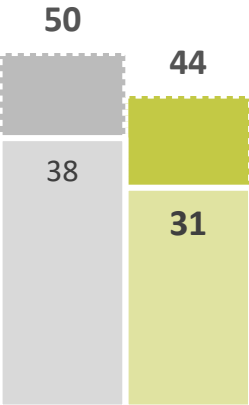
ALREADY  
USING



Plug-in Hybrid

Hybrid

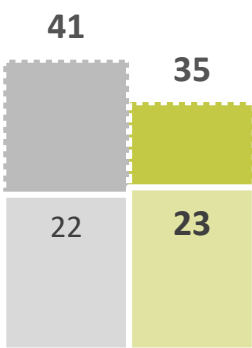
100% Battery  
Electric Vehicle



2022 2023

38 45

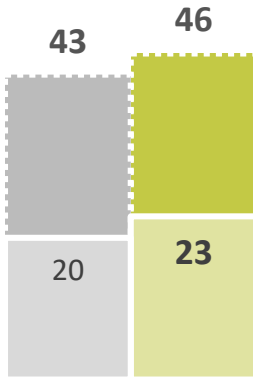
26 30



2022 2023

40 45

28 32



2022 2023

36 41

21 25

# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Passenger car fleet

In %



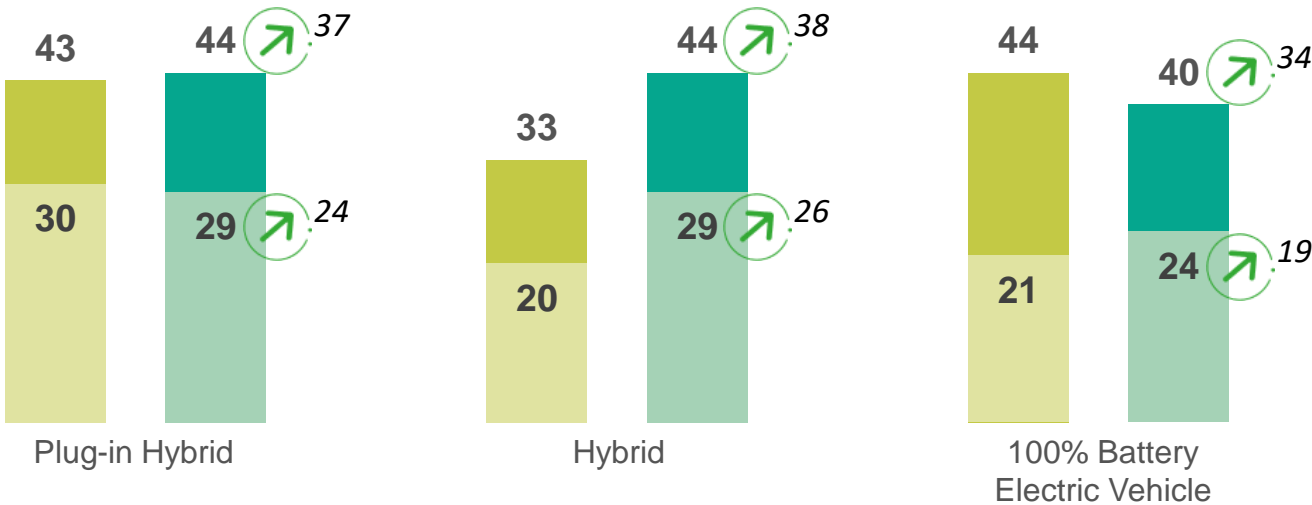
Passenger cars



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING



# REASONS FOR IMPLEMENTING OR CONSIDERING ALTERNATIVE FUEL TECHNOLOGIES

## Passenger car fleet

In %



Passenger cars

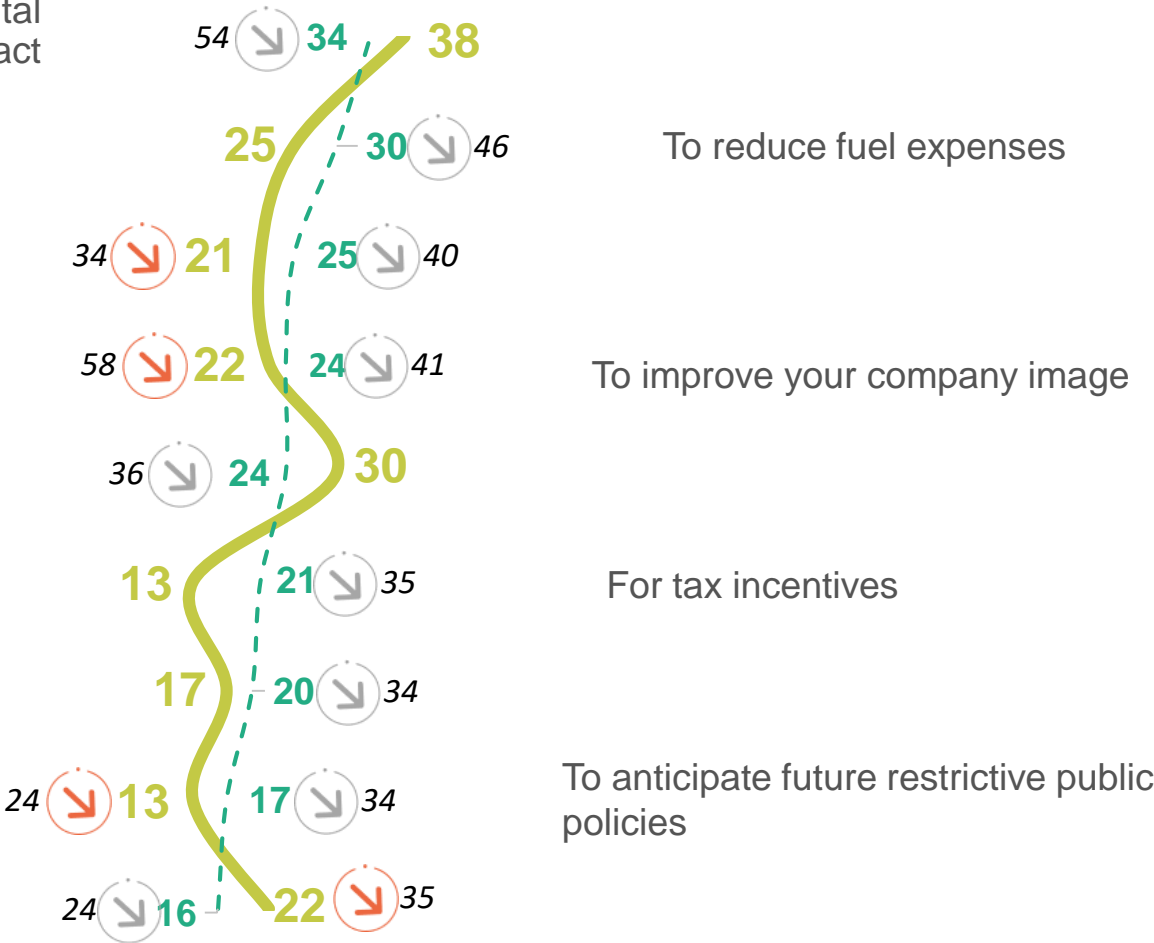
Because of their lower environmental impact

To be compliant with your CSR (Corporate Social Responsibility) policy

Because their total cost of ownership is in line with or lower than petrol or diesel alternatives

To be able to drive in Low Emission Zone

To fulfil your employees' requests



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

# CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

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

In %



LCVs

## HOW TO READ THE RESULTS ?

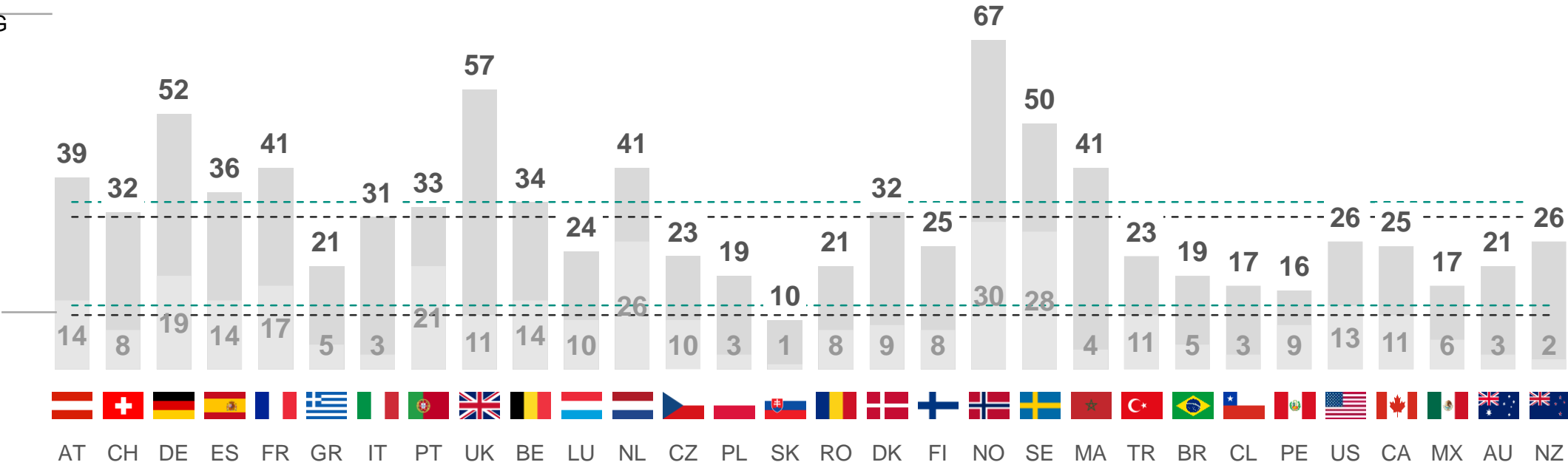
In Denmark, 32% of the companies are already using or consider to implement at least one alternative technology in the next 3 years. 9% of the companies is currently using at least one.



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING



EU 34

World 31

EU 13

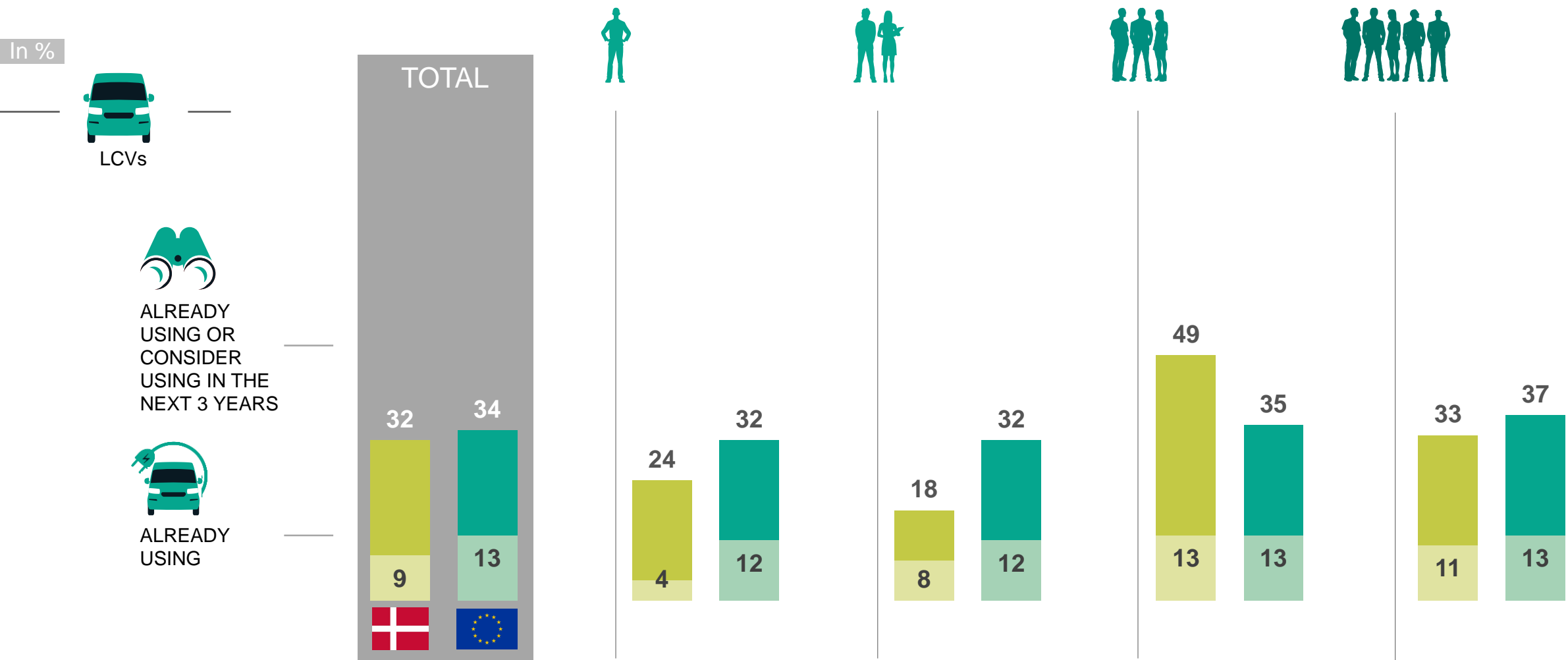
World 11

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



# CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

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



# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years

In %



LCVs

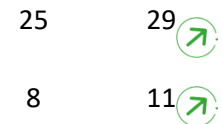
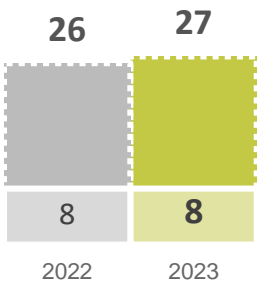
100% Battery  
Electric Vehicle



ALREADY USING OR  
CONSIDER USING IN  
THE NEXT 3 YEARS

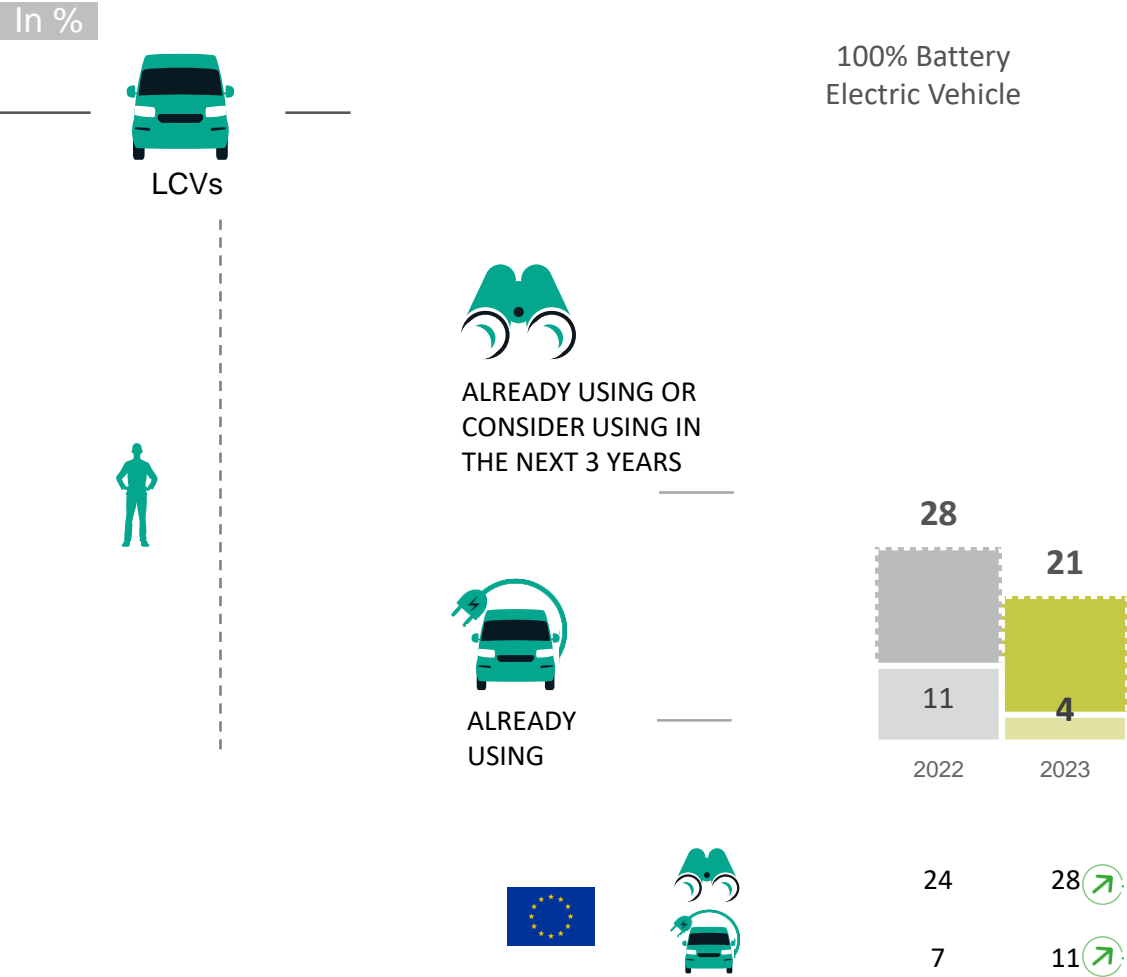


ALREADY  
USING



# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

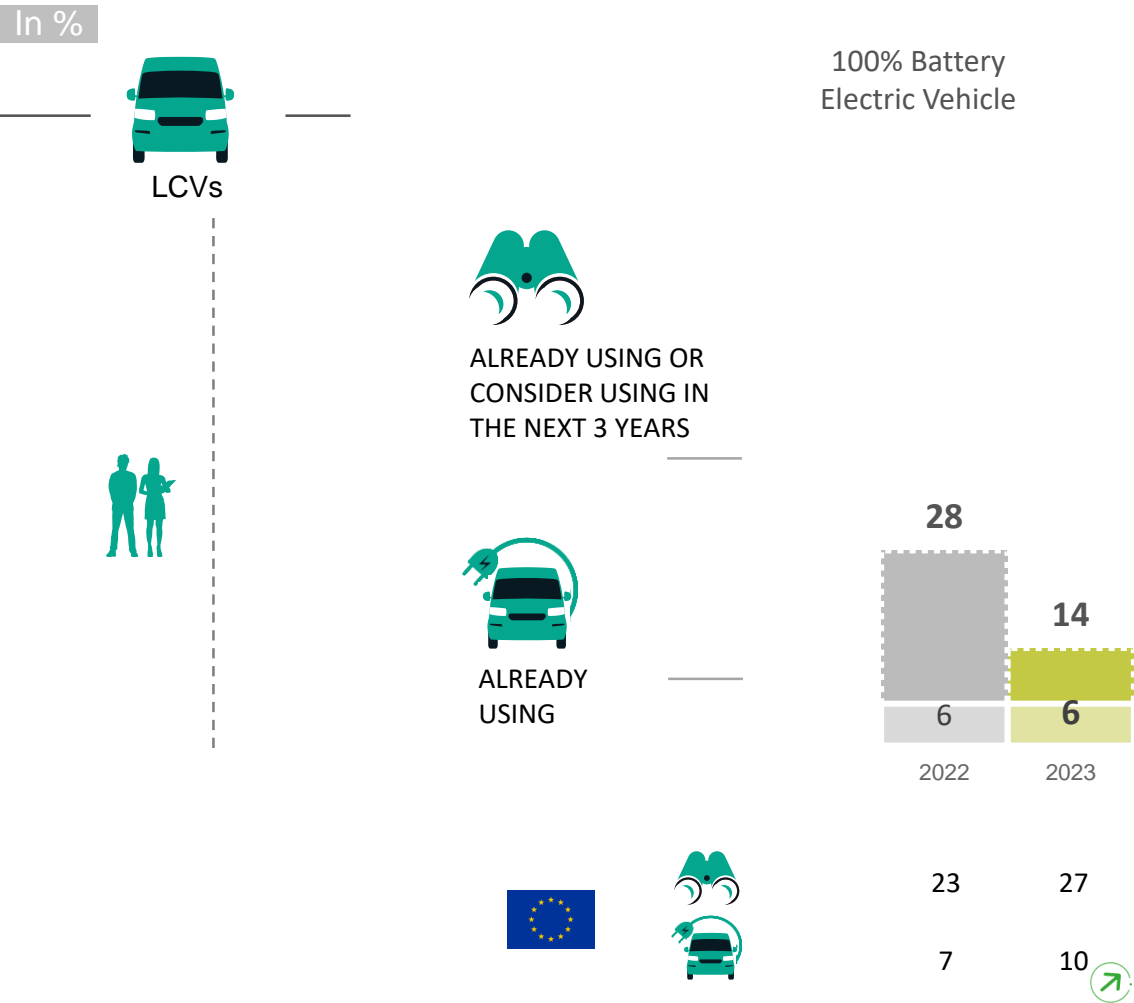
Evolution vs. previous years – Less than 10 empl.



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

# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

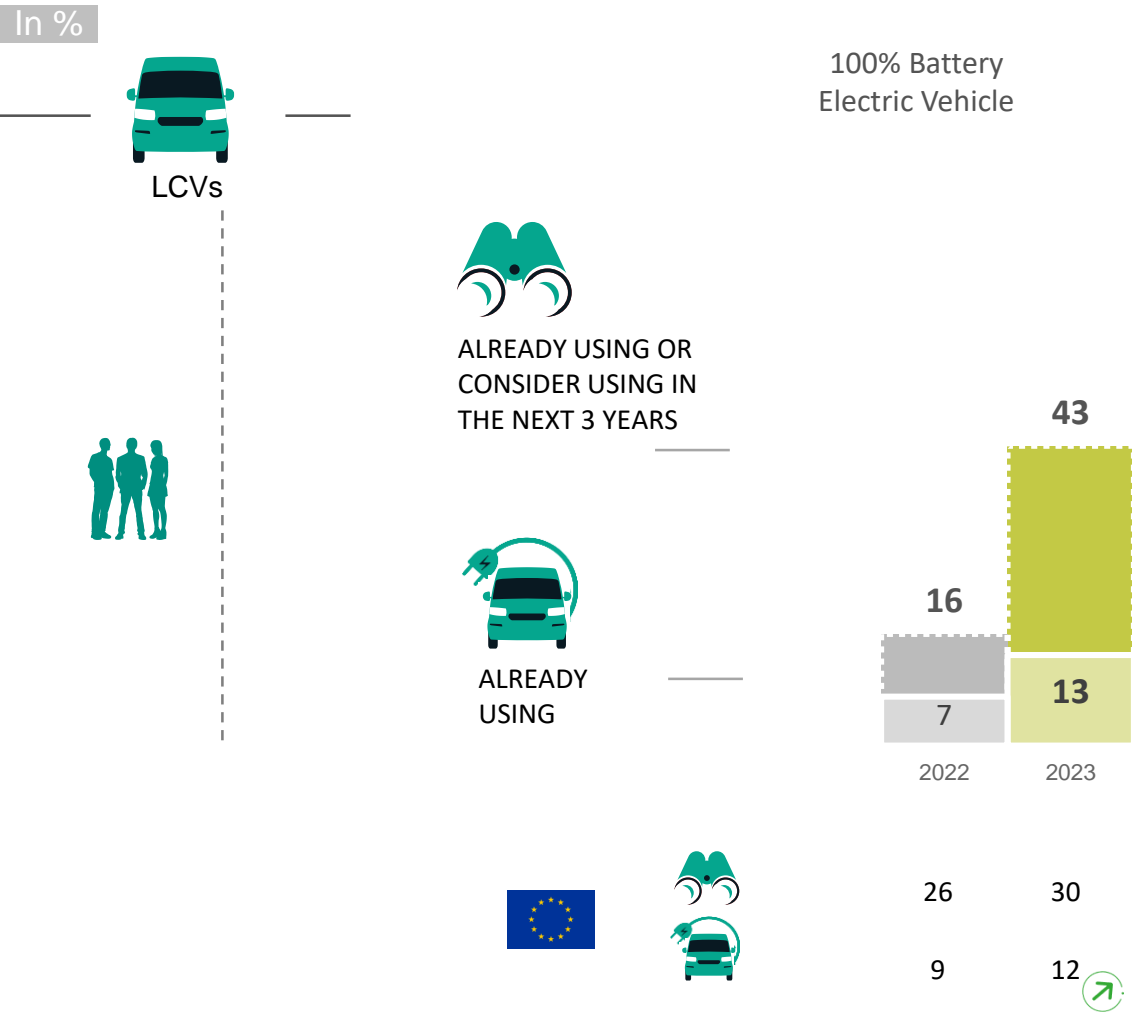
Evolution vs. previous years – 10 - 99 empl.



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

# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

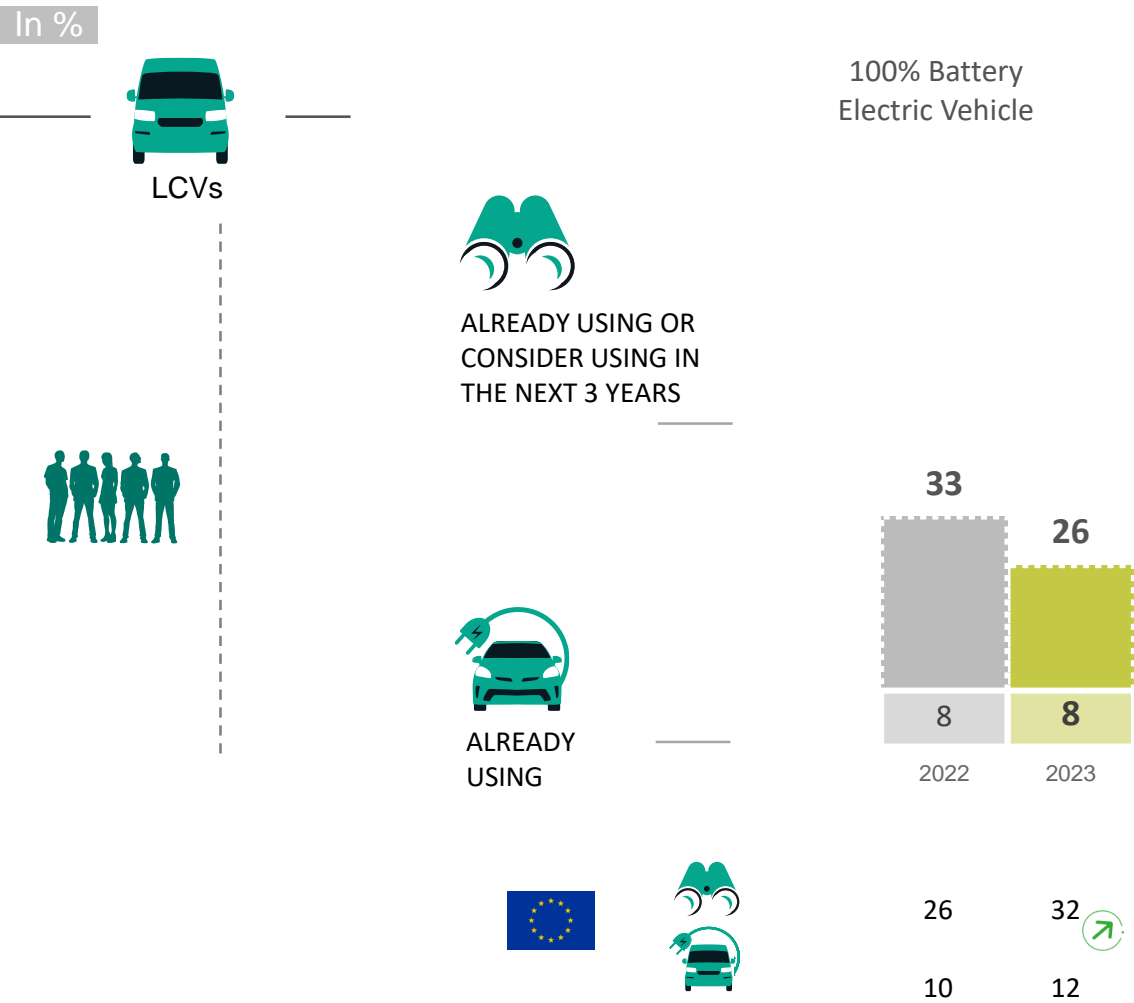
Evolution vs. previous years – 100 - 249 empl.



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

# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

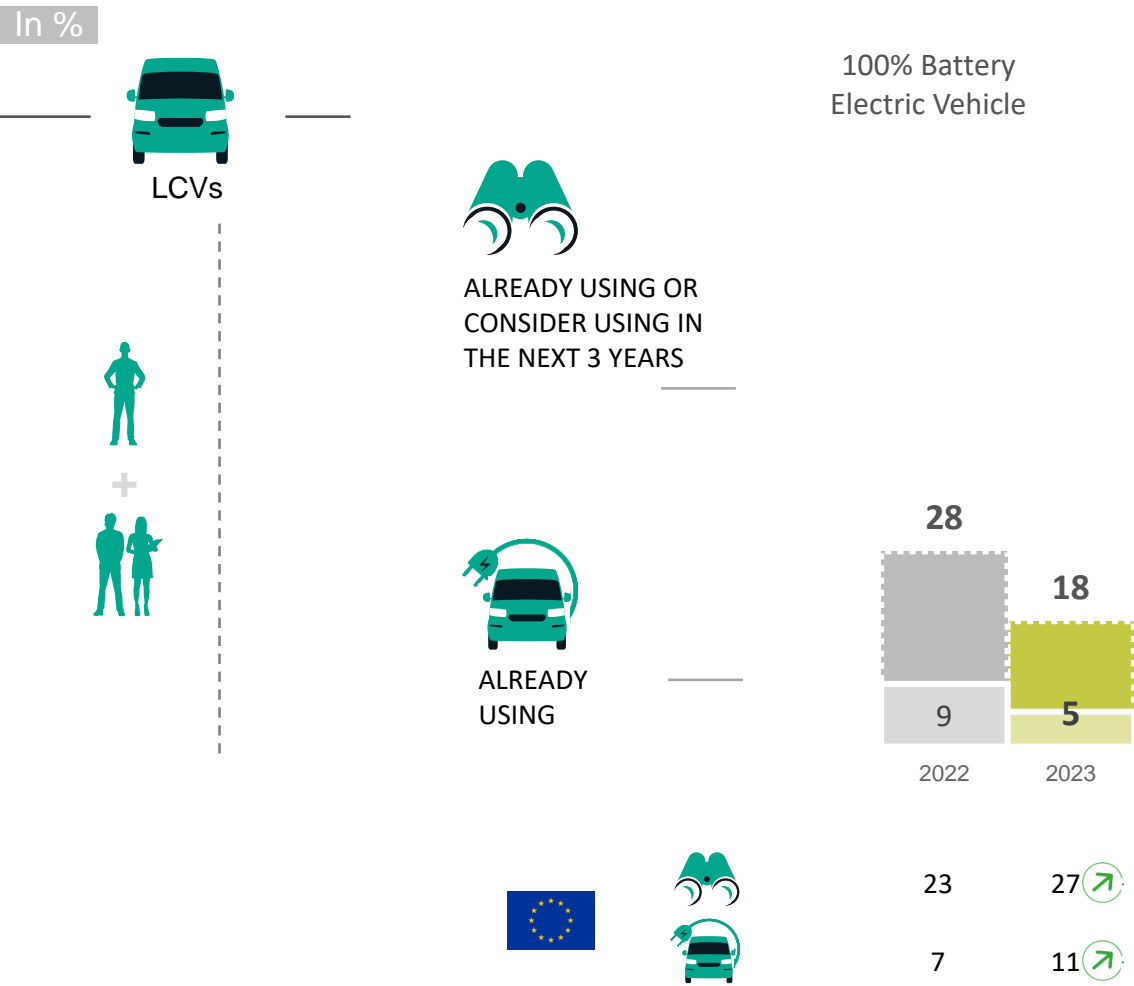
Evolution vs. previous years – 250 empl. or more



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

# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years – Focus on 1 to 99

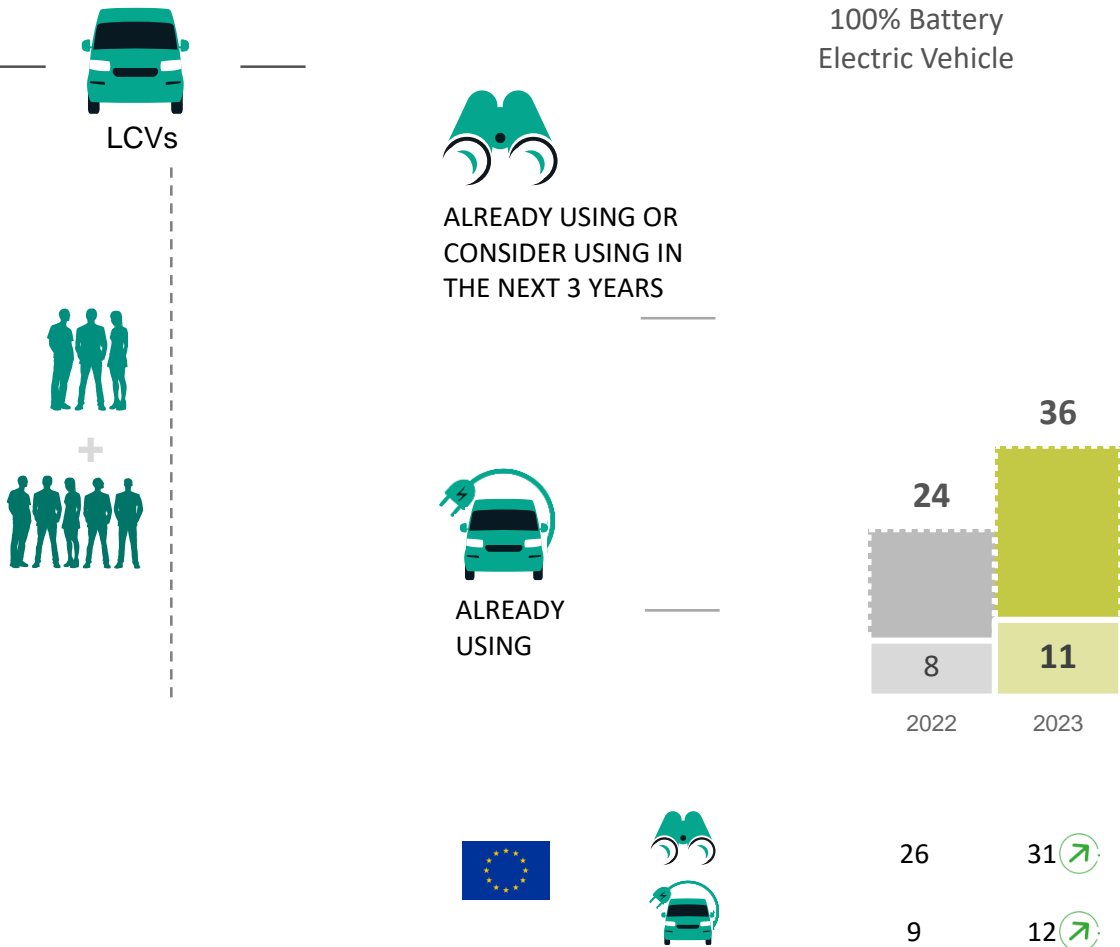


Amongst the following alternative fuel technologies, which ones do you currently use...?  
Amongst the following alternative fuel technologies, which ones are you considering using...?  
Basis: companies with LCVs

# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years – Focus on 100 and more

In %





# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY\*

LCV Fleet

In %



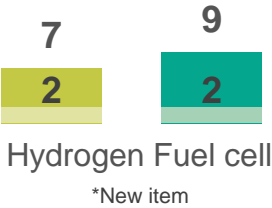
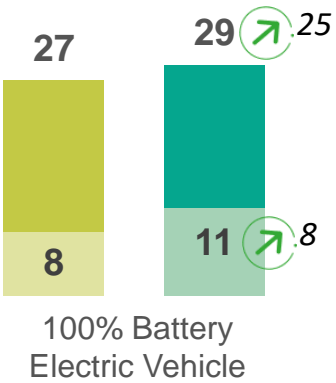
LCVs



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
IMPLEMENTED



# REASONS FOR IMPLEMENTING OR CONSIDERING ALTERNATIVE FUEL TECHNOLOGIES

LCV fleet

In %



LCVs



Because of their lower environmental impact

To improve your company image

Because their total cost of ownership is in line with or lower than petrol or diesel alternatives

To anticipate future restrictive public policies

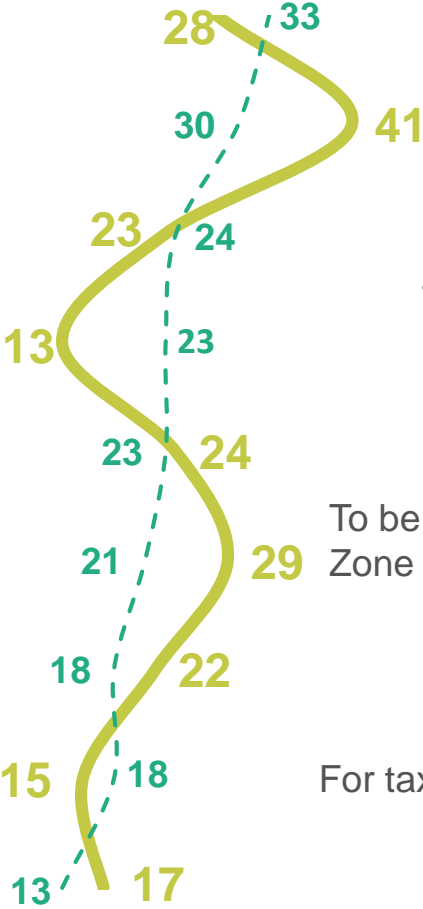
To fulfil your employees' requests

To reduce fuel expenses

To be compliant with your CSR (Corporate Social Responsibility) policy

To be able to drive in Low Emission Zone

For tax incentives



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

# EXPECTED FLEET SHARE PER ENERGY

In %

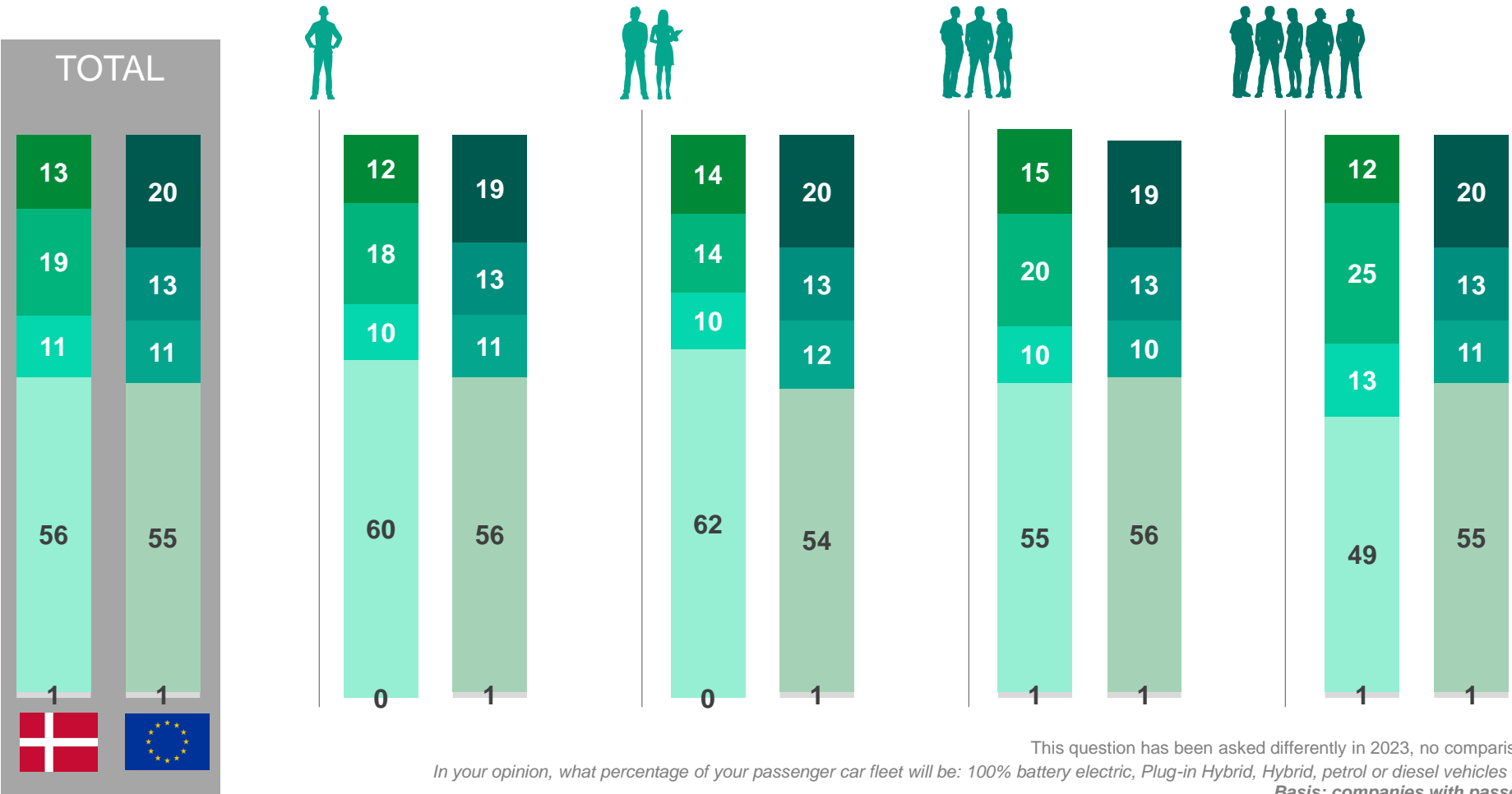


Passenger cars

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

## HOW TO READ THE RESULTS ?

In Denmark in 3 years, 13% of the companies passenger car fleet will be 100% BEV.

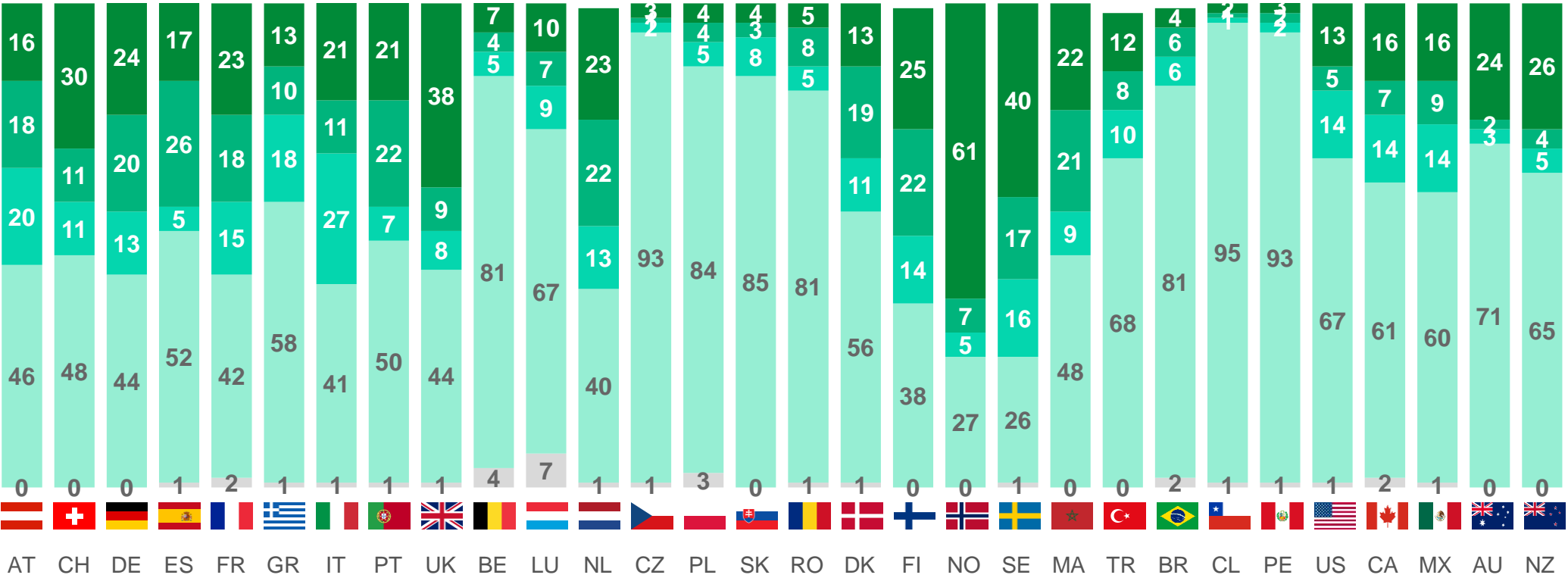
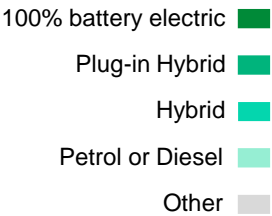
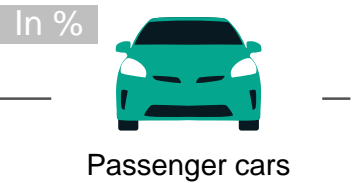


This question has been asked differently in 2023, no comparison vs 2022  
In your opinion, what percentage of your passenger car fleet will be: 100% battery electric, Plug-in Hybrid, Hybrid, petrol or diesel vehicles in 3 years?  
Basis: companies with passenger cars

# EXPECTED FLEET SHARE PER ENERGY

## HOW TO READ THE RESULTS ?

In Denmark in 3 years, 13% of the companies passenger car fleet will be 100% BEV.



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

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

# EXPECTED FLEET SHARE PER ENERGY

In %

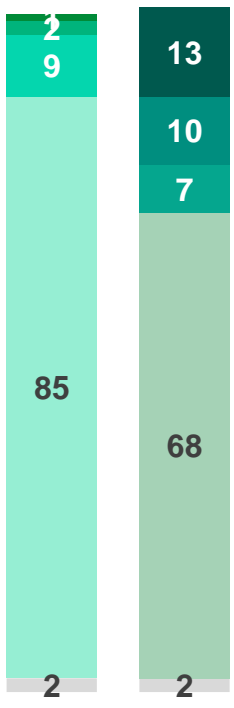
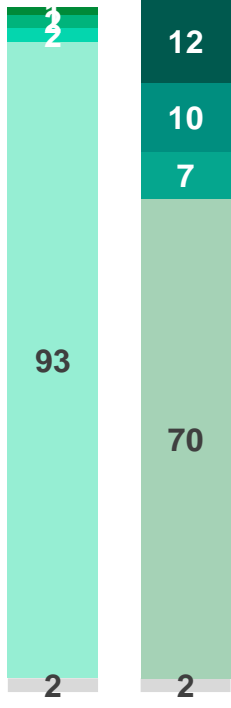
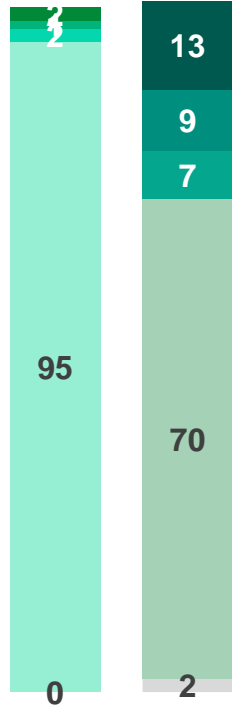
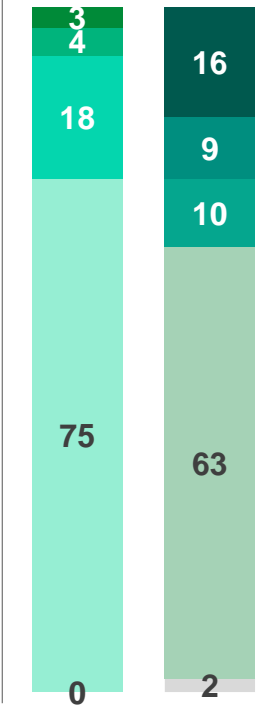
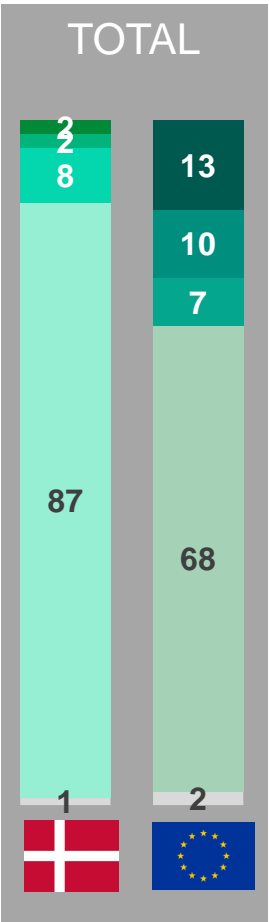


LCVs

## HOW TO READ THE RESULTS ?

In Denmark in 3 years, 2% of the light commercial vehicle fleet will be 100% BEV.

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



This question has been asked differently in 2023, no comparison vs 2022  
In your opinion, what percentage of your light commercial vehicle fleet will be: 100% battery electric, Plug-in Hybrid, Hybrid, petrol or diesel vehicles in 3 years?  
Basis: companies with LCVs

# EXPECTED FLEET SHARE PER ENERGY

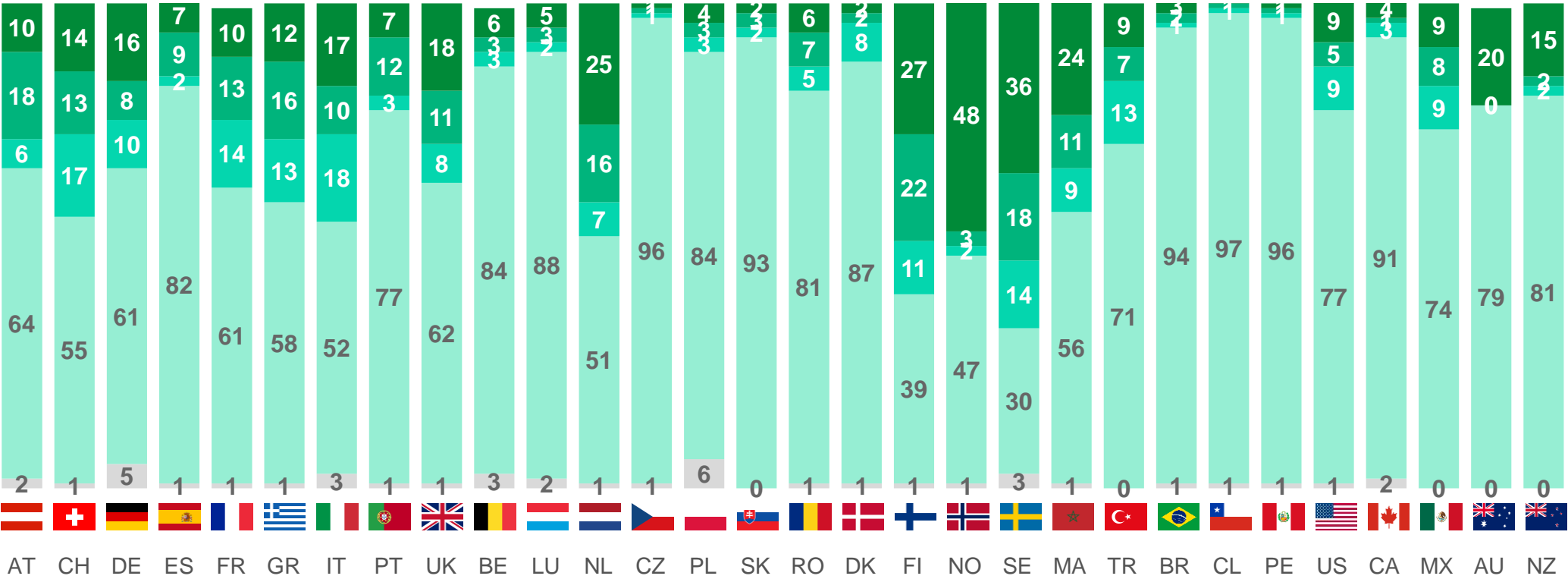
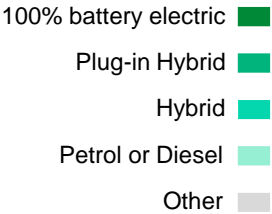
In %



LCVs

## HOW TO READ THE RESULTS ?

In Denmark in 3 years, 2% of the light commercial vehicle fleet will be 100% BEV.



This question has been asked differently in 2023, no comparison vs 2022  
In your opinion, what percentage of your light commercial vehicle fleet will be: 100% battery electric, Plug-in Hybrid, Hybrid, petrol or diesel vehicles in 3 years?  
Basis: companies with LCVs

5

# ENERGY MIX FOCUS PER ALTERNATIVE TECHNOLOGY



# HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %



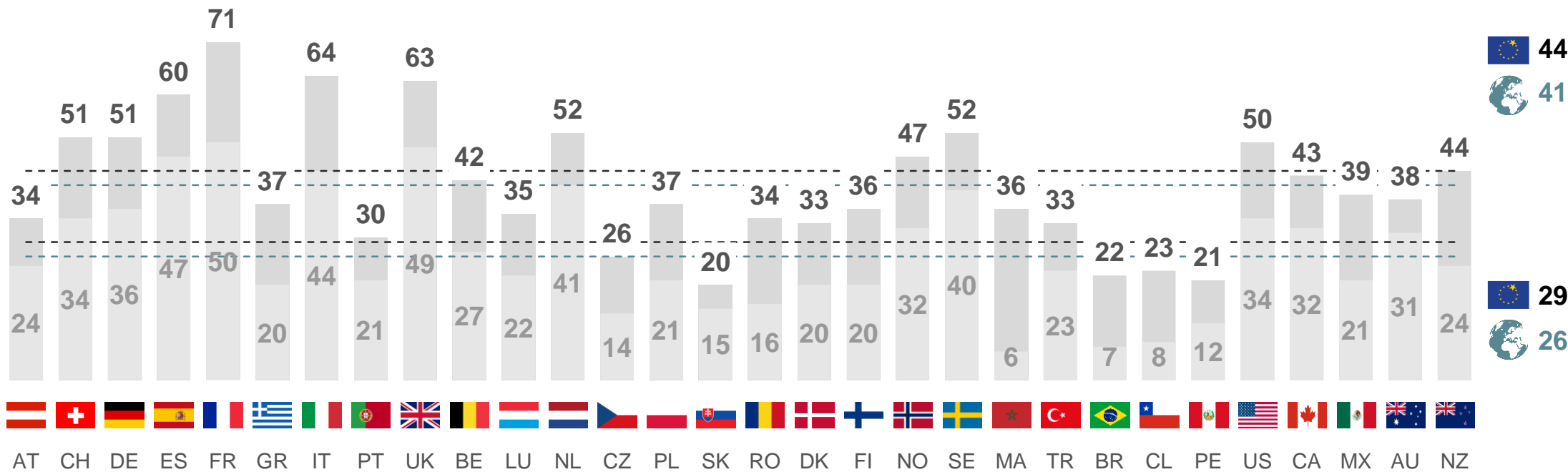
Passenger cars



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



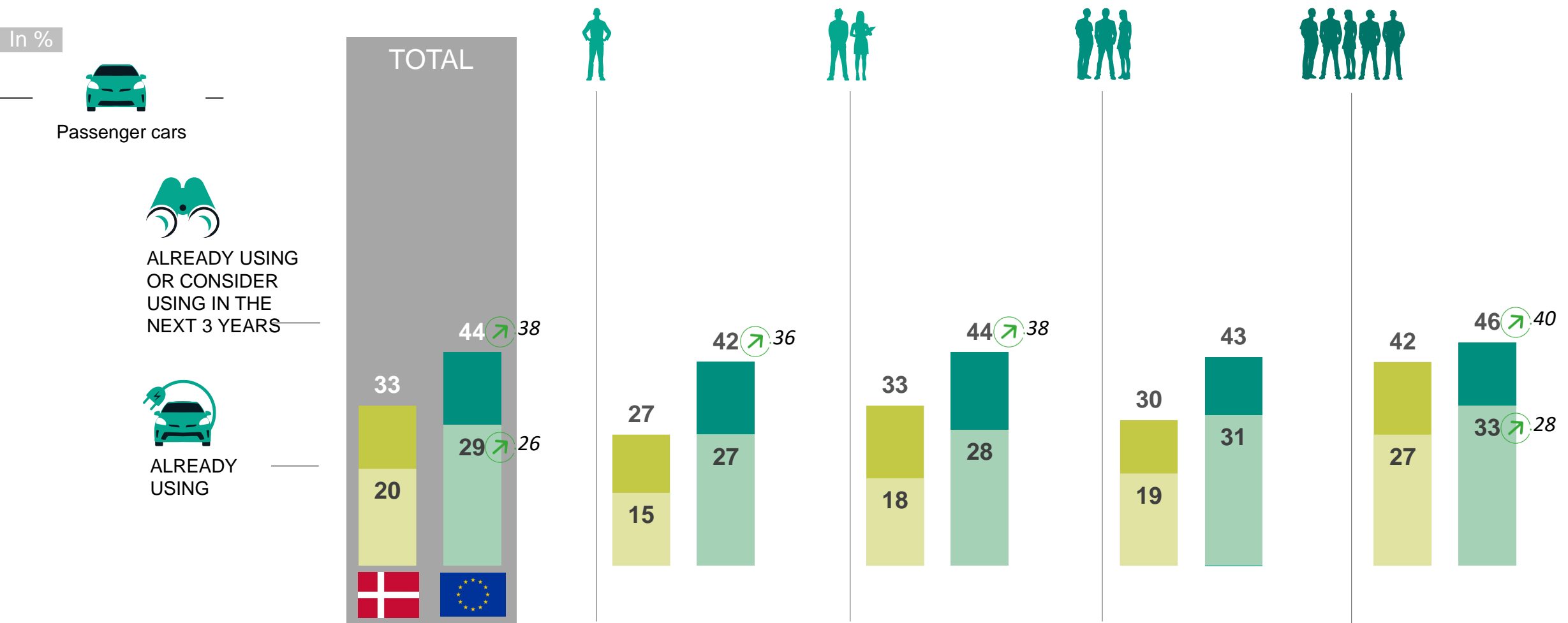
ALREADY  
USING



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



# HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY



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

# PLUG-IN HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %



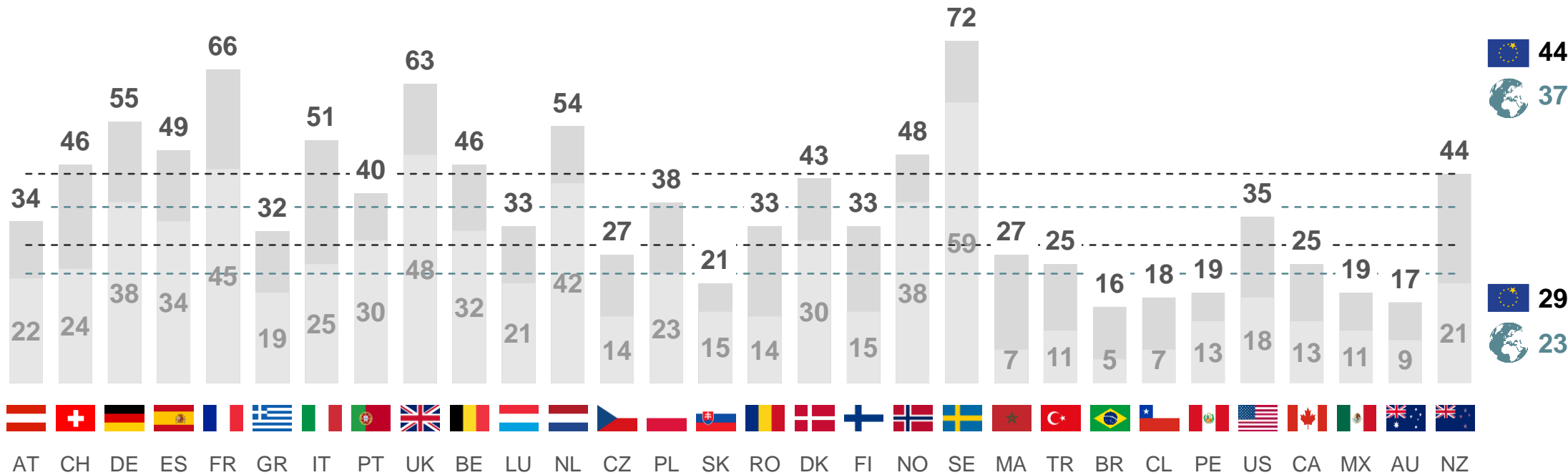
Passenger cars



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS

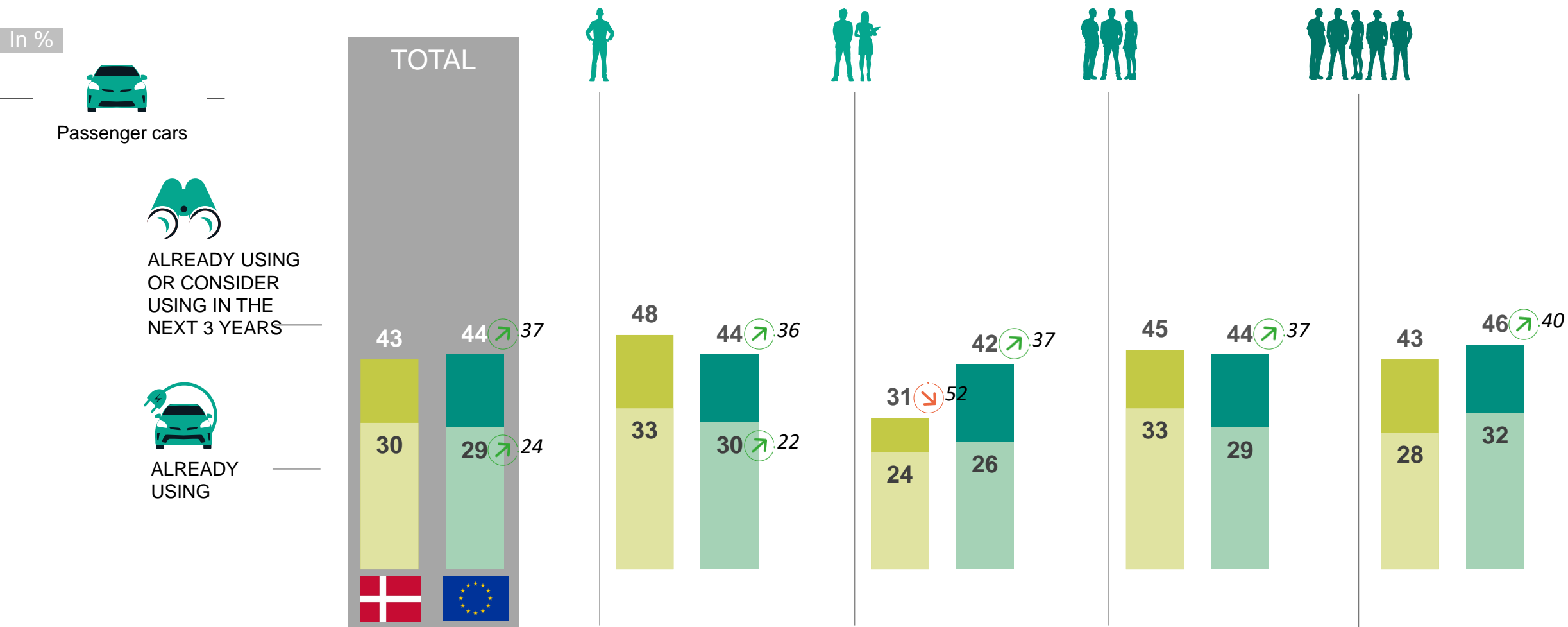


ALREADY  
USING



Amongst the following alternative fuel technologies, which ones do you currently use...?  
Amongst the following alternative fuel technologies, which ones are you considering using...?  
**Basis: companies with passenger cars**  
78

# PLUG-IN HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY



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

# 100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %



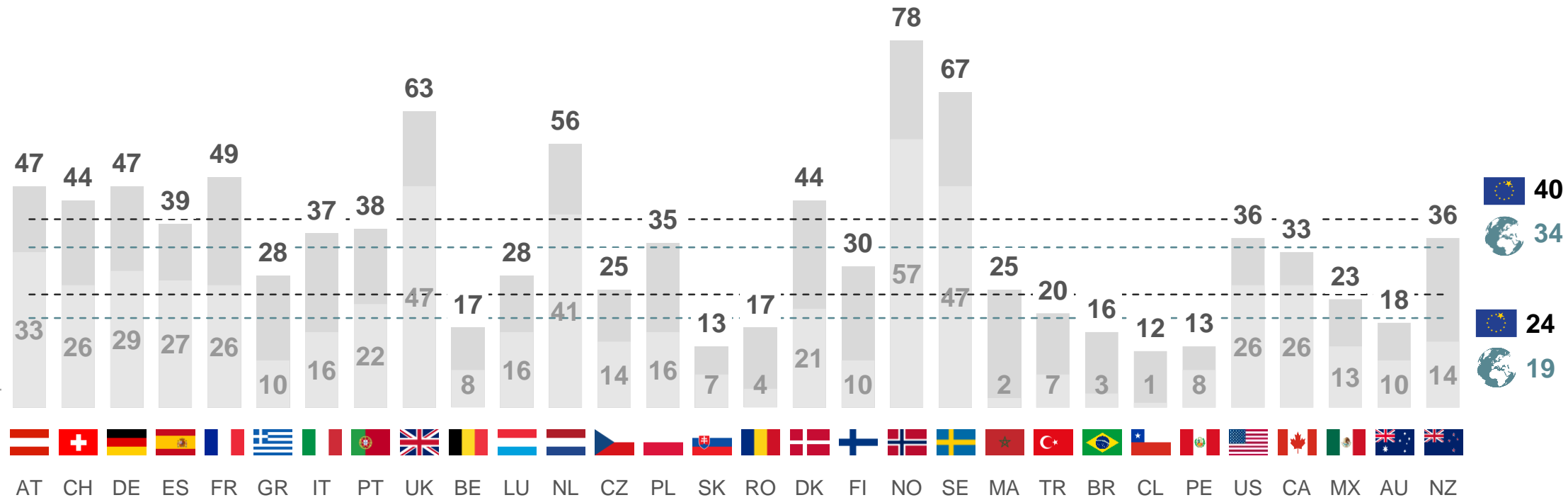
Passenger cars



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS

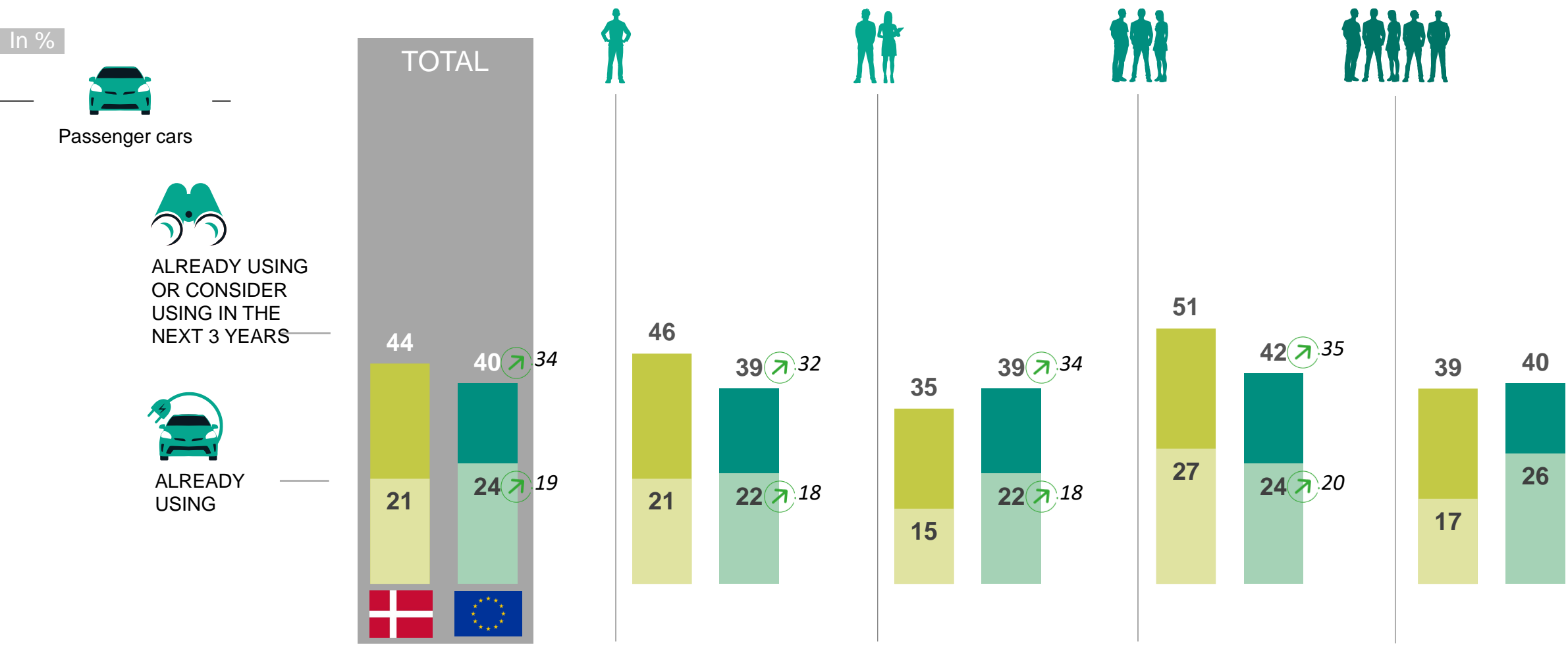


ALREADY  
USING



Amongst the following alternative fuel technologies, which ones do you currently use...?  
Amongst the following alternative fuel technologies, which ones are you considering using...?  
Basis: companies with passenger cars  
80

# 100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY



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

# 100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %



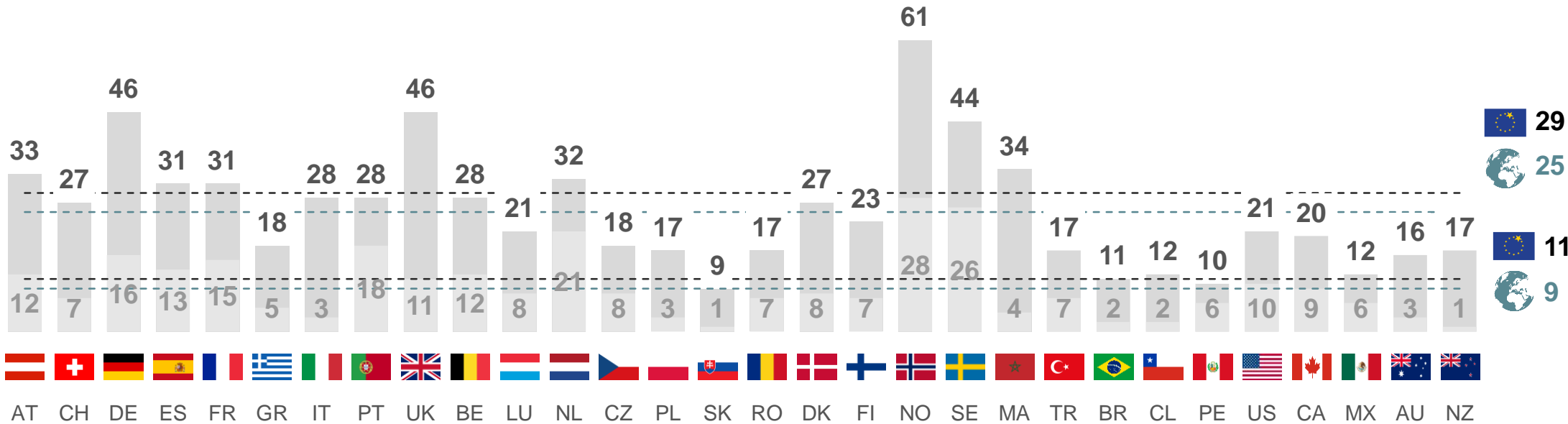
LCVs



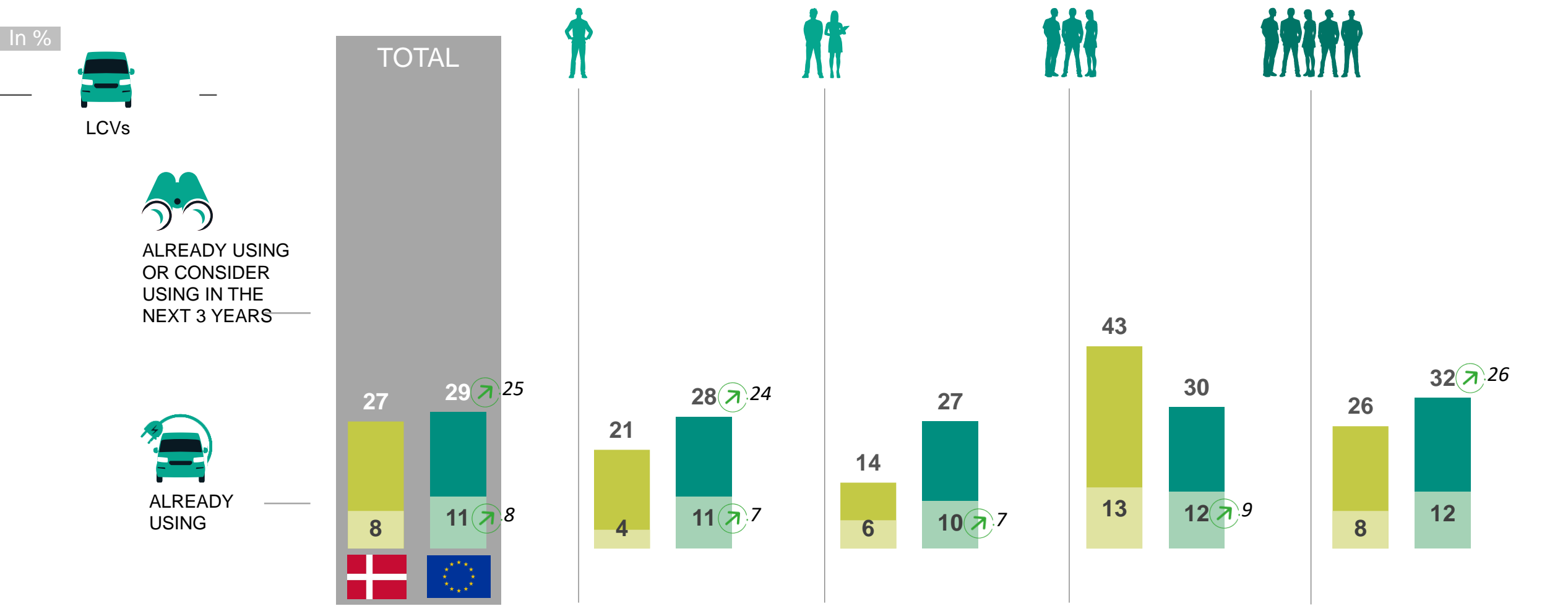
ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



# 100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY



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

Basis: companies with LCVs

# HYDROGEN FUEL CELL ELECTRIC VEHICLE : IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %



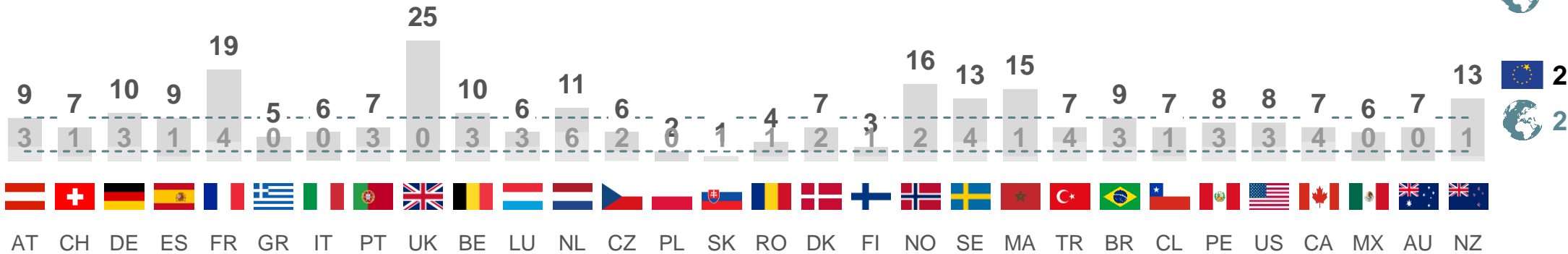
LCVs



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



9

9

2

2

New item added in 2023

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

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

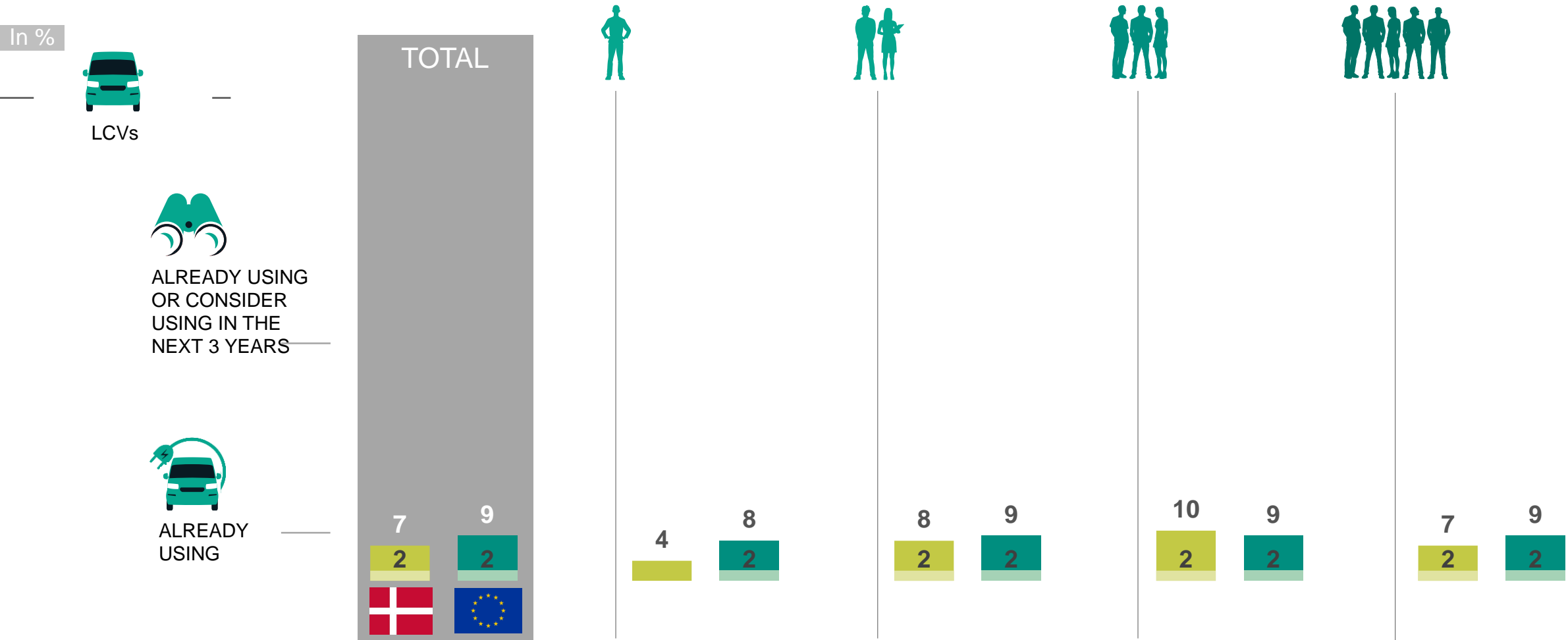
Basis: companies with LCVs

84

Classification : Internal



# HYDROGEN FUEL CELL ELECTRIC VEHICLE : IMPLEMENTATION WITHIN COMPANY FLEET POLICY



New item added in 2023


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

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

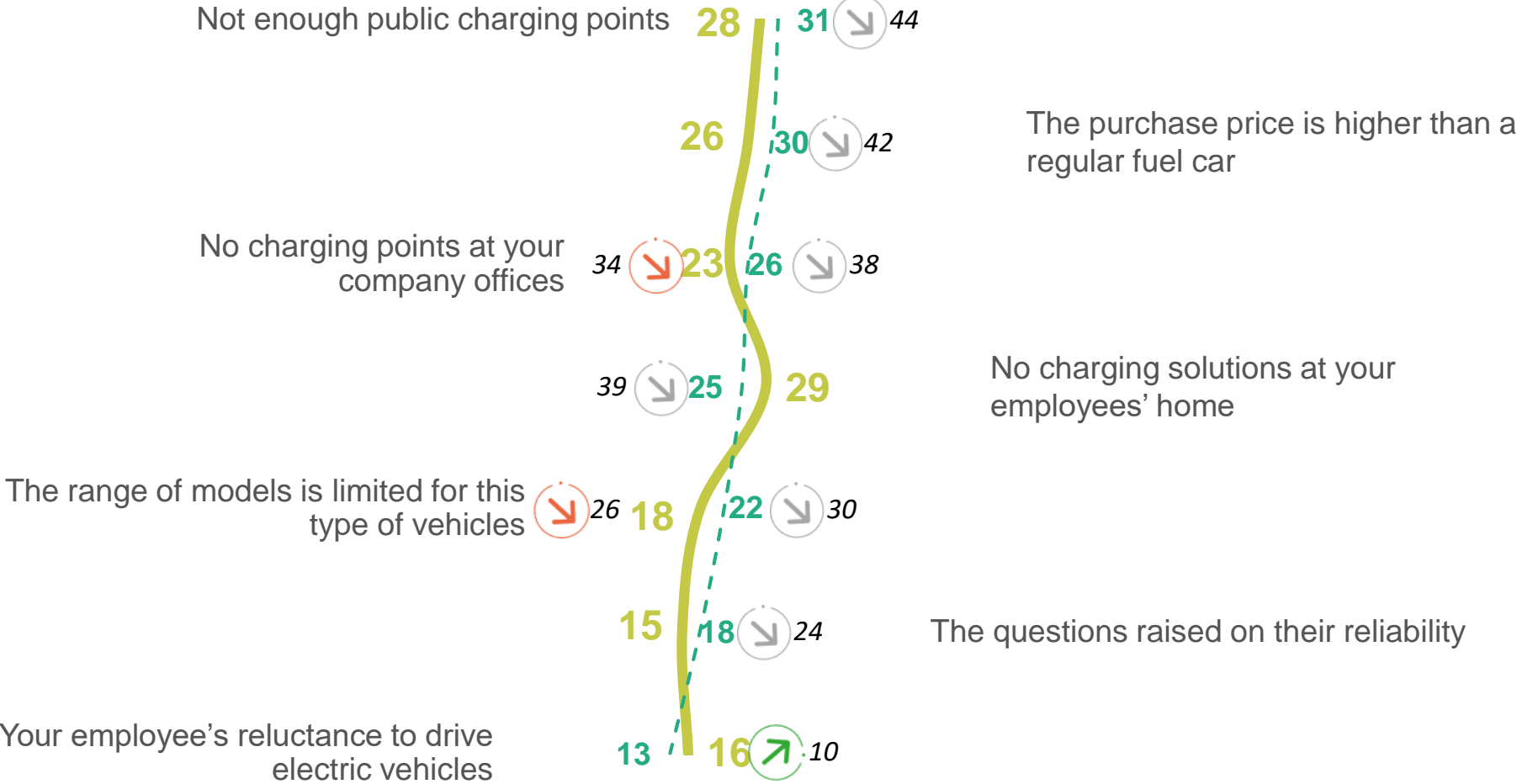
Basis: companies with LCVs

# CONSTRAINTS OF 100% BATTERY ELECTRIC VEHICLE USAGE

In %

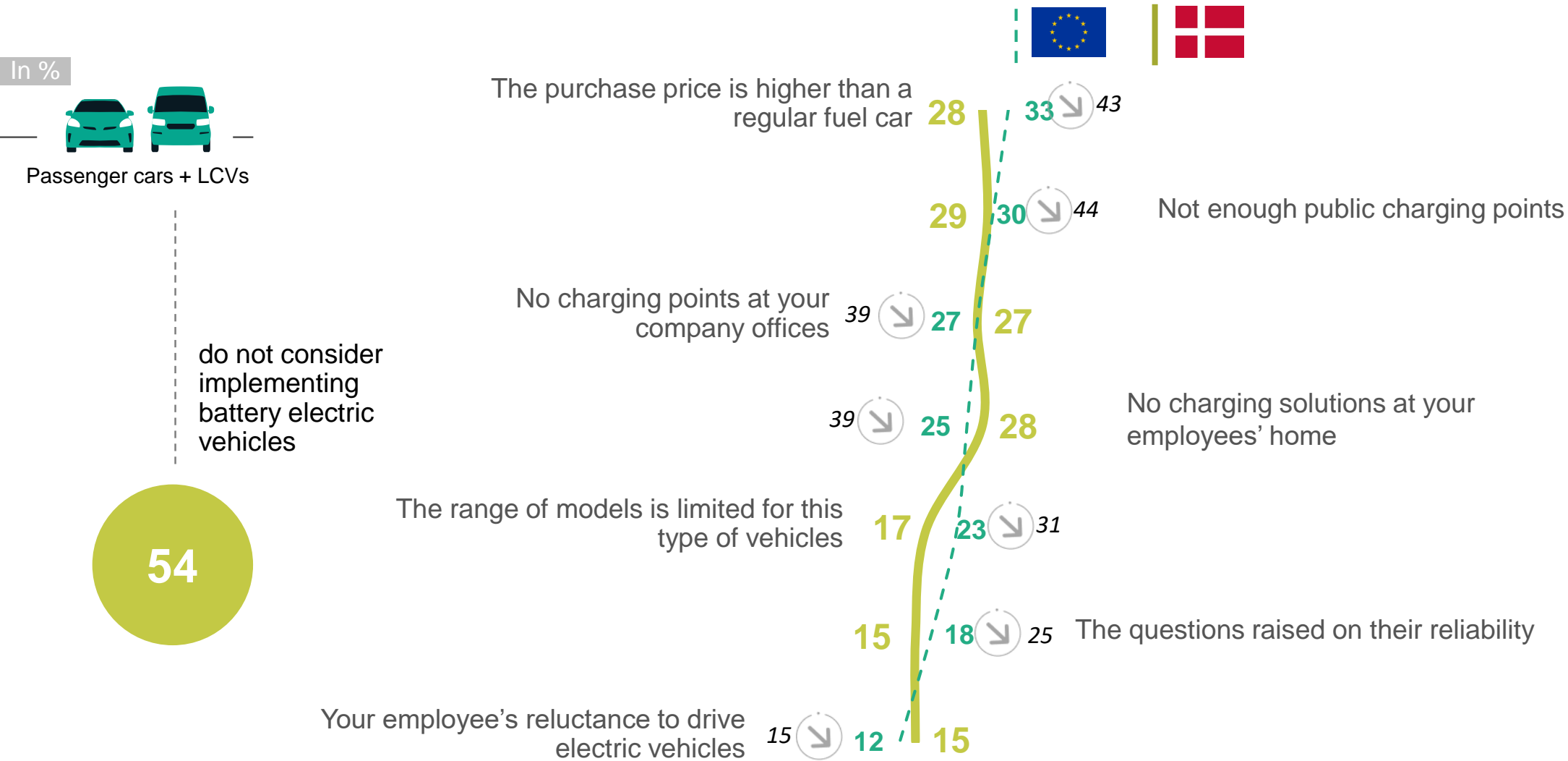


Passenger cars + LCVs



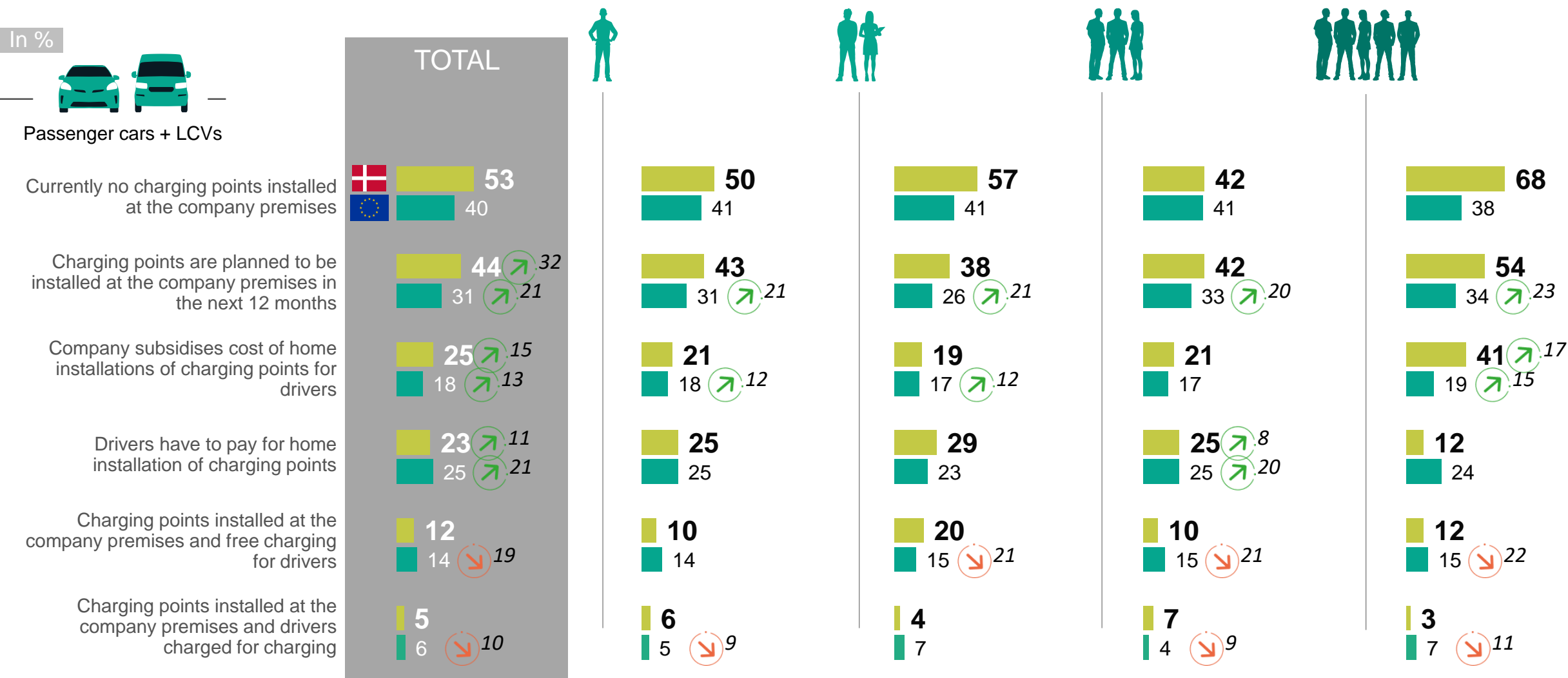
What are the constraints of using 100% Battery Electric vehicles?  
Basis: Know 100% BEV technology

# CONSTRAINTS OF 100% BATTERY ELECTRIC VEHICLE USAGE



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

# ACCESS TO CHARGING POINTS



6

# WHAT ARE THE PERSPECTIVES IN TERMS OF MOBILITY SOLUTIONS?



# MOBILITY SOLUTIONS



## TOP 3 USED SOLUTIONS

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



22%



19%

**#2** Car or cash allowance

20%

16%

**#3** Corporate car sharing: where an employee can make a vehicle reservation via an external solution

18%

13%



## TOP 3 POTENTIAL NEXT 3 YEARS

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



29%



28%

**#2** Car or cash allowance

28%

26%

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

25%

29%



# PENETRATION OF ALTERNATIVE MOBILITY SOLUTIONS IS HIGH, DRIVEN BY THE SMALLEST COMPANIES

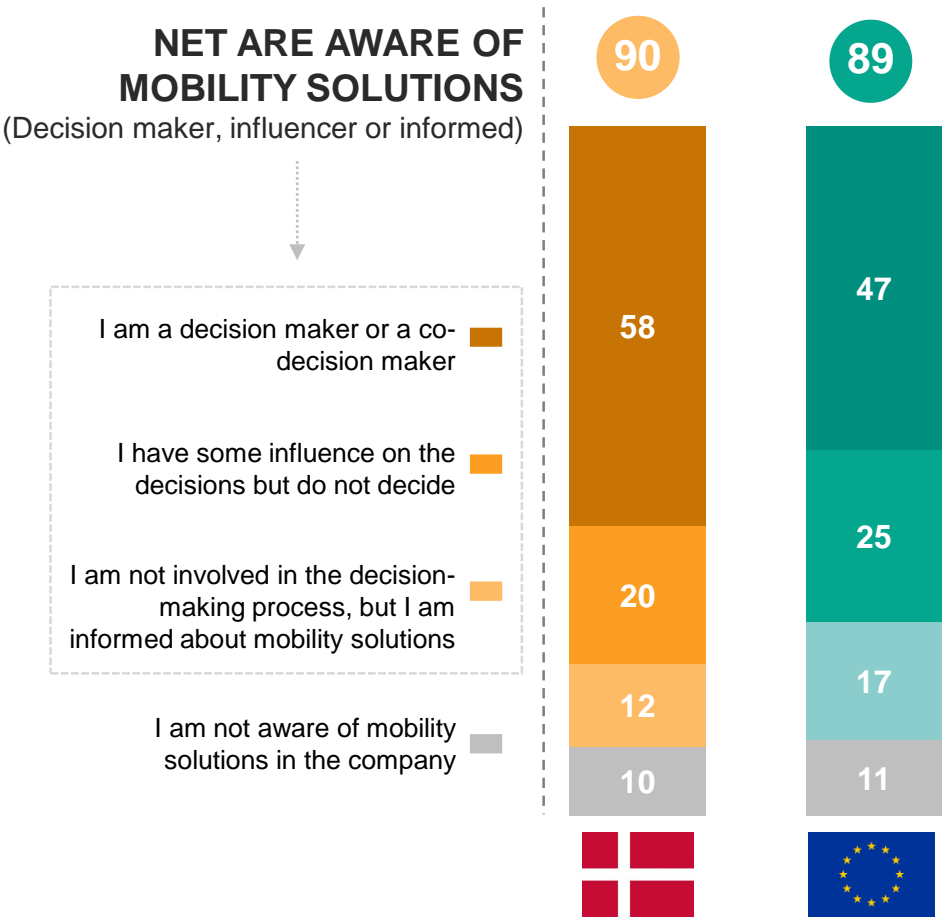
*To note : in 2023 were interrogated only respondents that are aware of mobility solutions, which means almost 90% of overall population (no impact on the representativity of the results). Almost one third of the respondents were managing directors.*

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

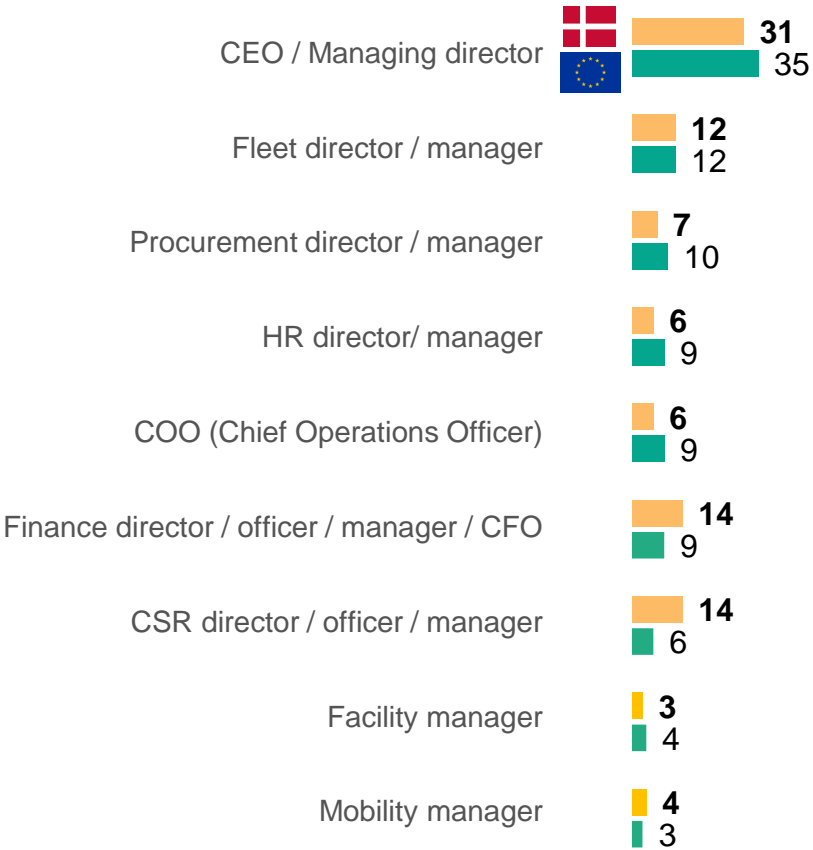
- 1 In 2023, 7 companies out of 10 have already implemented at least one mobility solution, similarly to the European average.  
This high level is still **driven by the smallest companies**.
- 2 Corporate car sharing and mobility app are the most chosen solutions by these small companies in 2023.
- 3 Like last year, these solutions are still considered as an **add-on to the company vehicles** and are not dedicated to replace them.

# MOBILITY SOLUTION DECISION MAKERS

## RESPONDENTS INVOLVEMENT IN MOBILITY SOLUTION DECISIONS

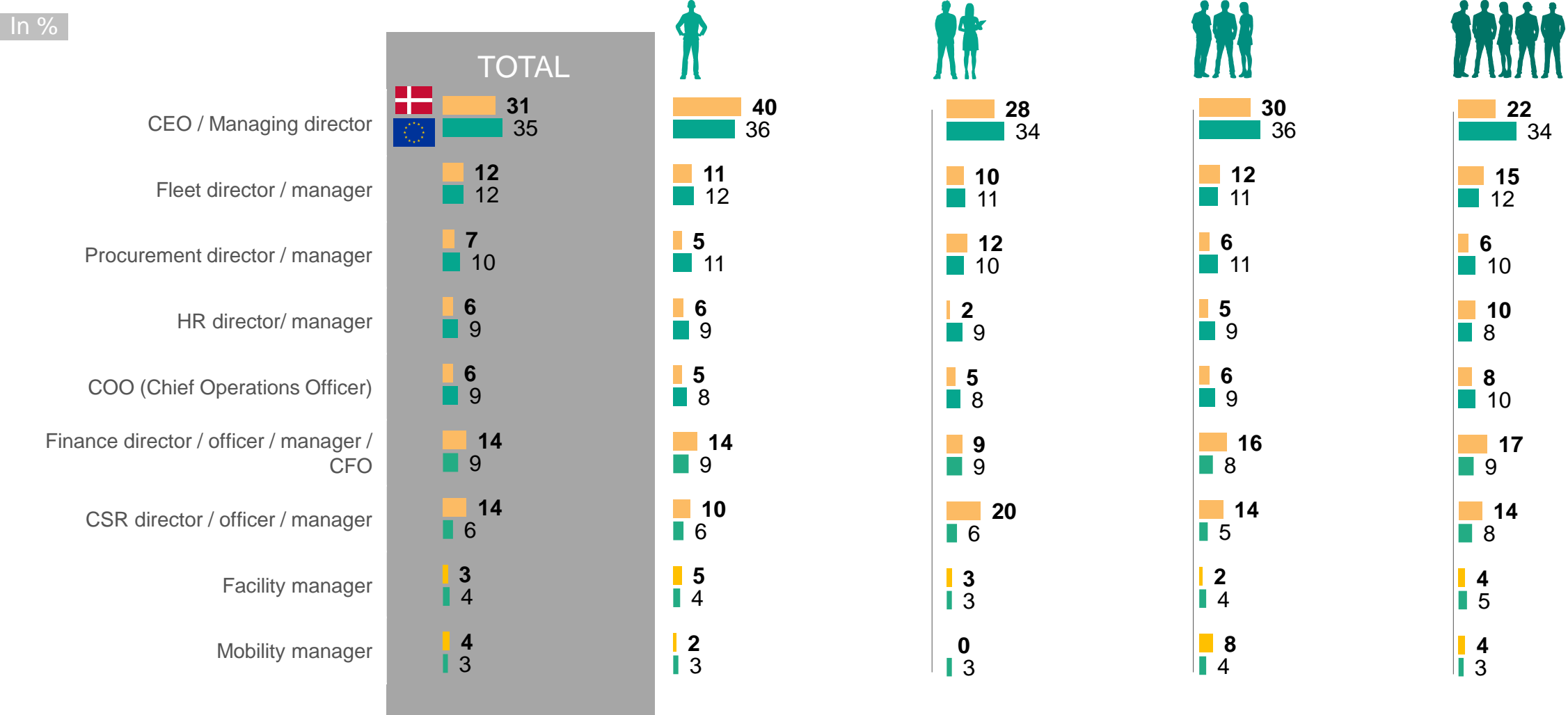


## POSITION OF THE PERSON WHO DECIDES ON MOBILITY SOLUTIONS





# POSITION OF THE PERSON WHO DECIDES ON MOBILITY SOLUTIONS



# MOBILITY SOLUTIONS LIST AND DEFINITIONS



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



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



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



**AN APP TO BOOK MOBILITY SOLUTIONS PROVIDED BY THE COMPANY**



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



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



**PUBLIC TRANSPORT**



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



**CAR OR CASH ALLOWANCE** \*New item

# MOBILITY SOLUTIONS IMPLEMENTATION

At least one already implemented

In %

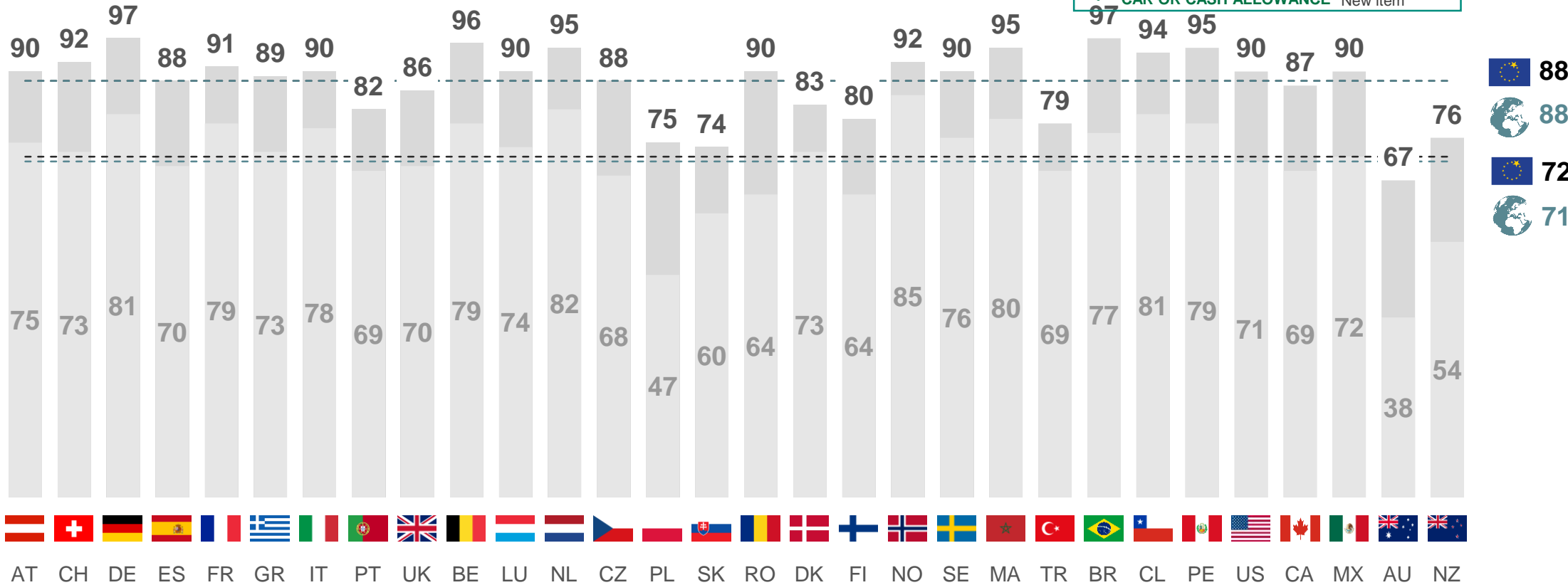


ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING

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



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

# MOBILITY SOLUTIONS IMPLEMENTATION

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

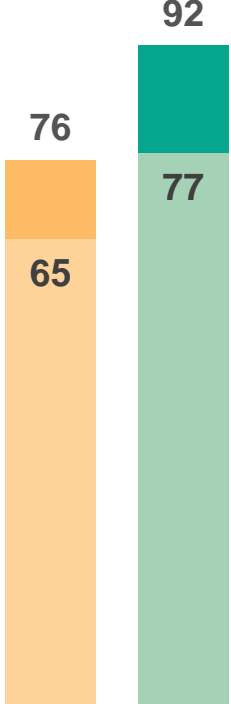
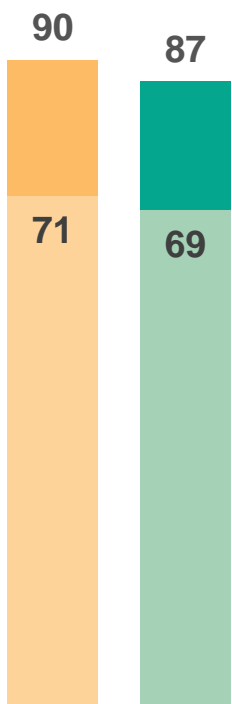
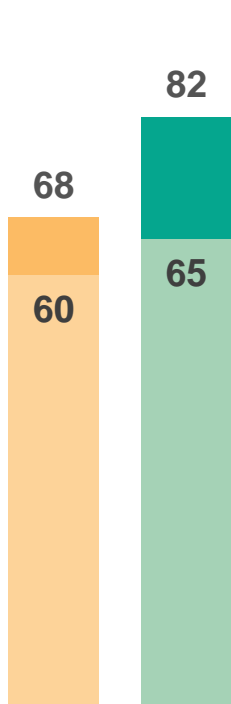
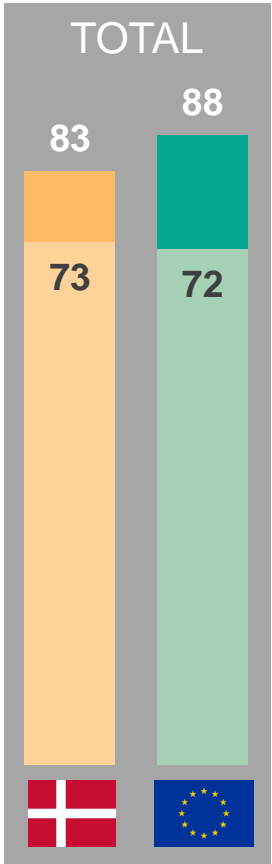
In %



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



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

# OVERVIEW OF MOBILITY SOLUTIONS IMPLEMENTATION

In %

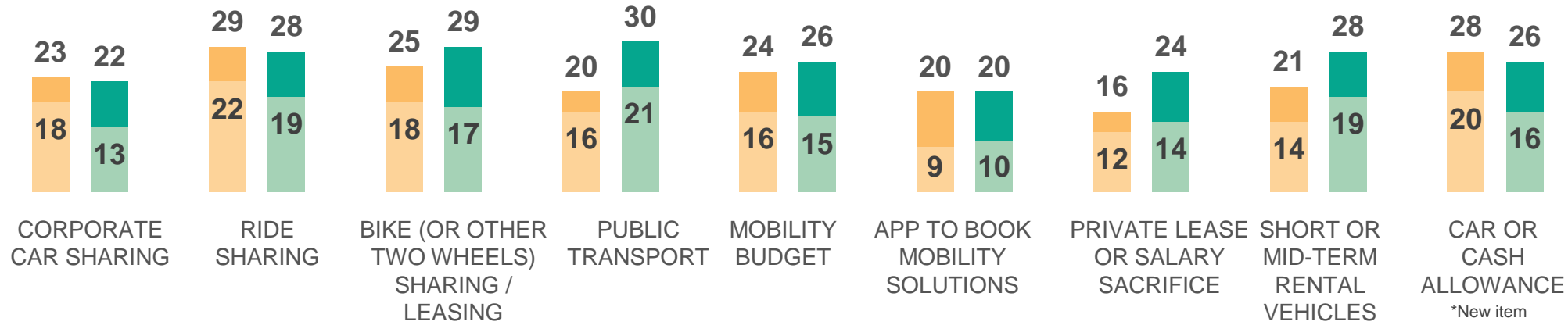
**73%** Of companies have already implemented at least one of these solutions



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



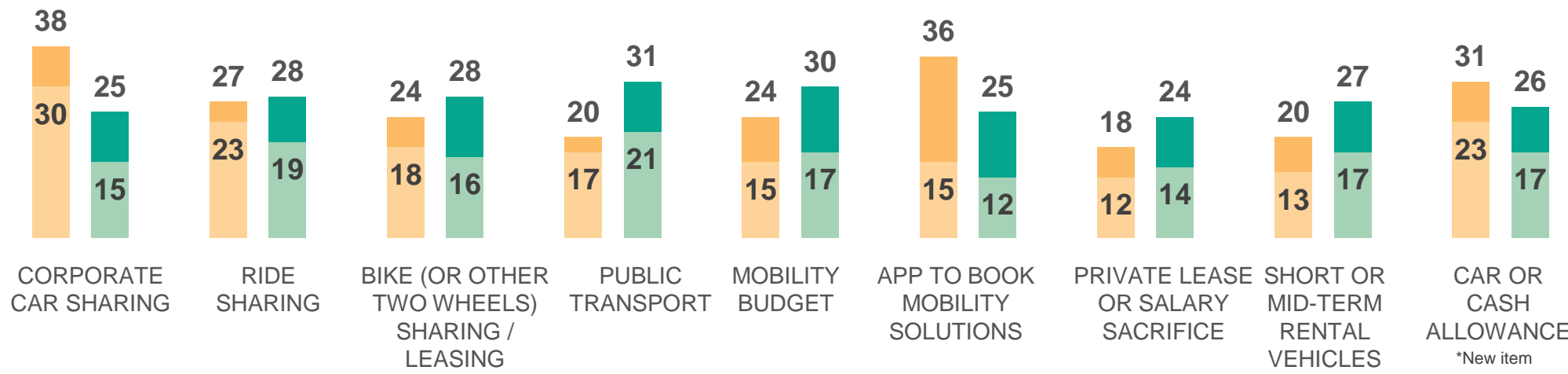
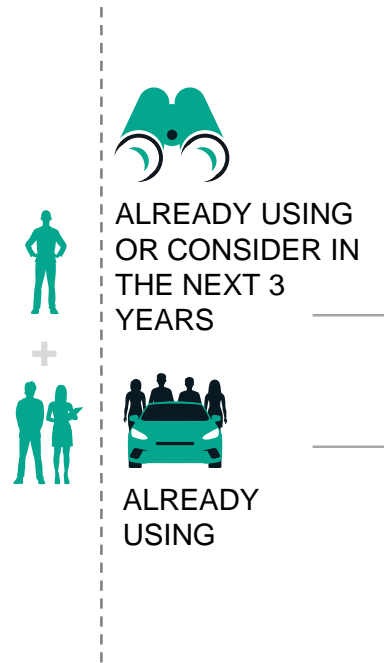
Which of the following have you implemented or will you implement in the next 3 years?  
Response scale: Already using, considered in the next 3 years, not interested  
Basis: companies with corporate vehicles = 100%  
Question asked to respondents that are aware of mobility solutions

# OVERVIEW OF MOBILITY SOLUTIONS IMPLEMENTATION

Focus on 1 to 99

77%

Of companies have already implemented at least one of these solutions



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

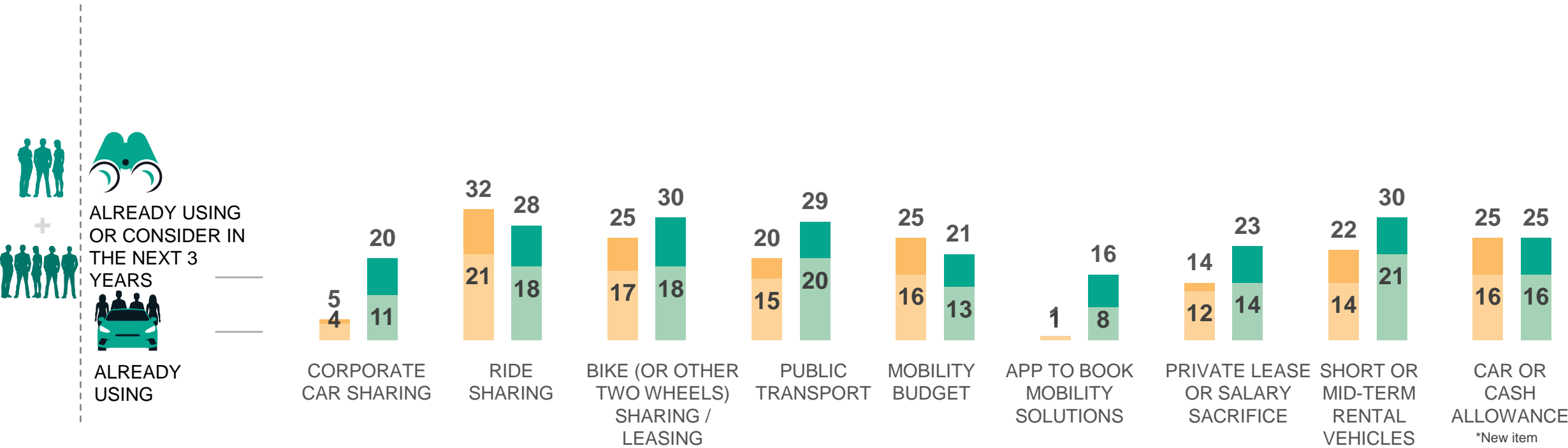
# OVERVIEW OF MOBILITY SOLUTIONS IMPLEMENTATION

Focus on 100 and more

In %

68%

Of companies have already implemented at least one of these solutions



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

# CORPORATE CAR SHARING IMPLEMENTATION

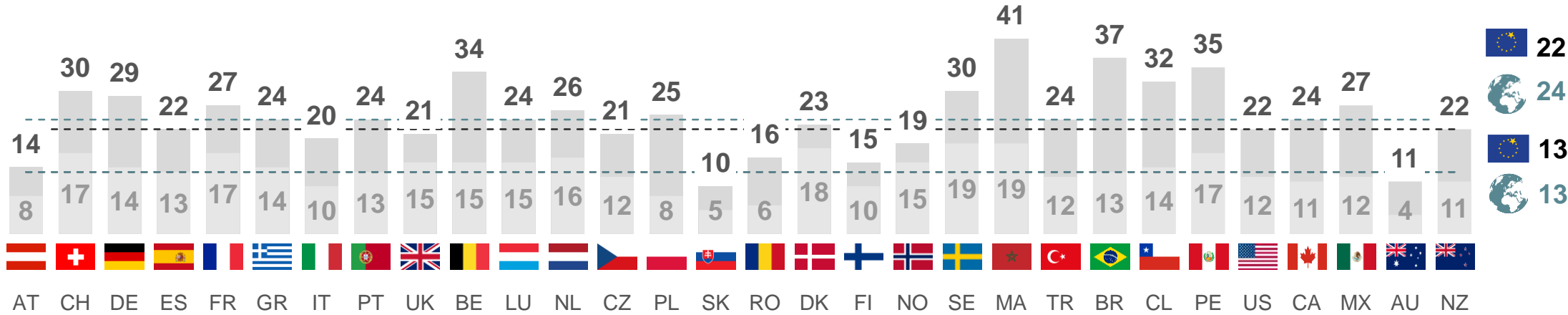
In %



ALREADY  
IMPLEMENTED  
OR CONSIDER  
NEXT 3 YEARS



ALREADY  
USING



22

24

13

13



# CORPORATE CAR SHARING IMPLEMENTATION

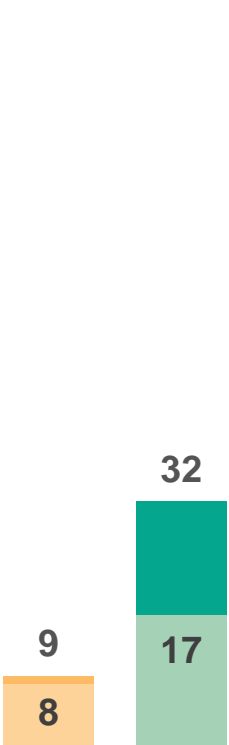
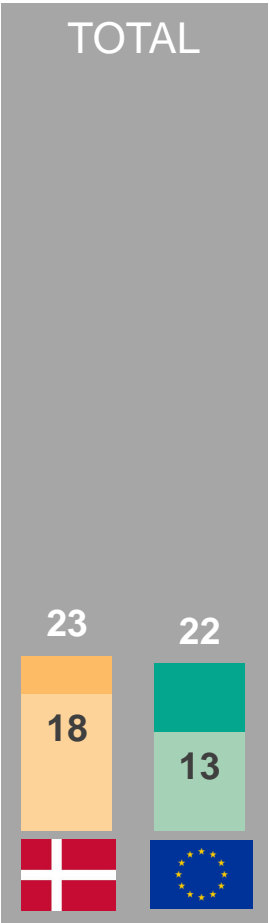
In %



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



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

# RIDE SHARING IMPLEMENTATION

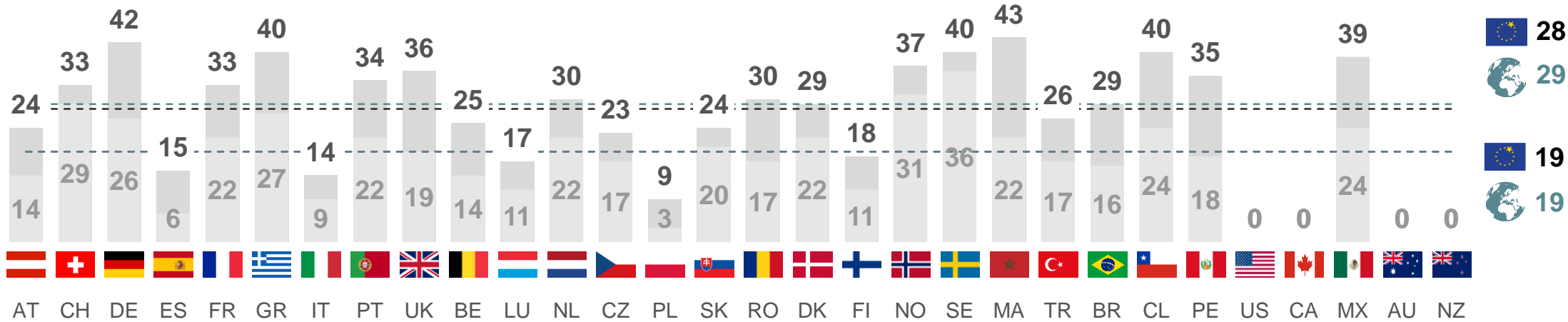
In %



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



Which of the following have you implemented or will you implement in the next 3 years?  
Response scale: Already using, considered in the next 3 years, not interested  
Basis: companies with corporate vehicles = 100%  
Question asked to respondents that are aware of mobility solutions  
102

# RIDE SHARING IMPLEMENTATION

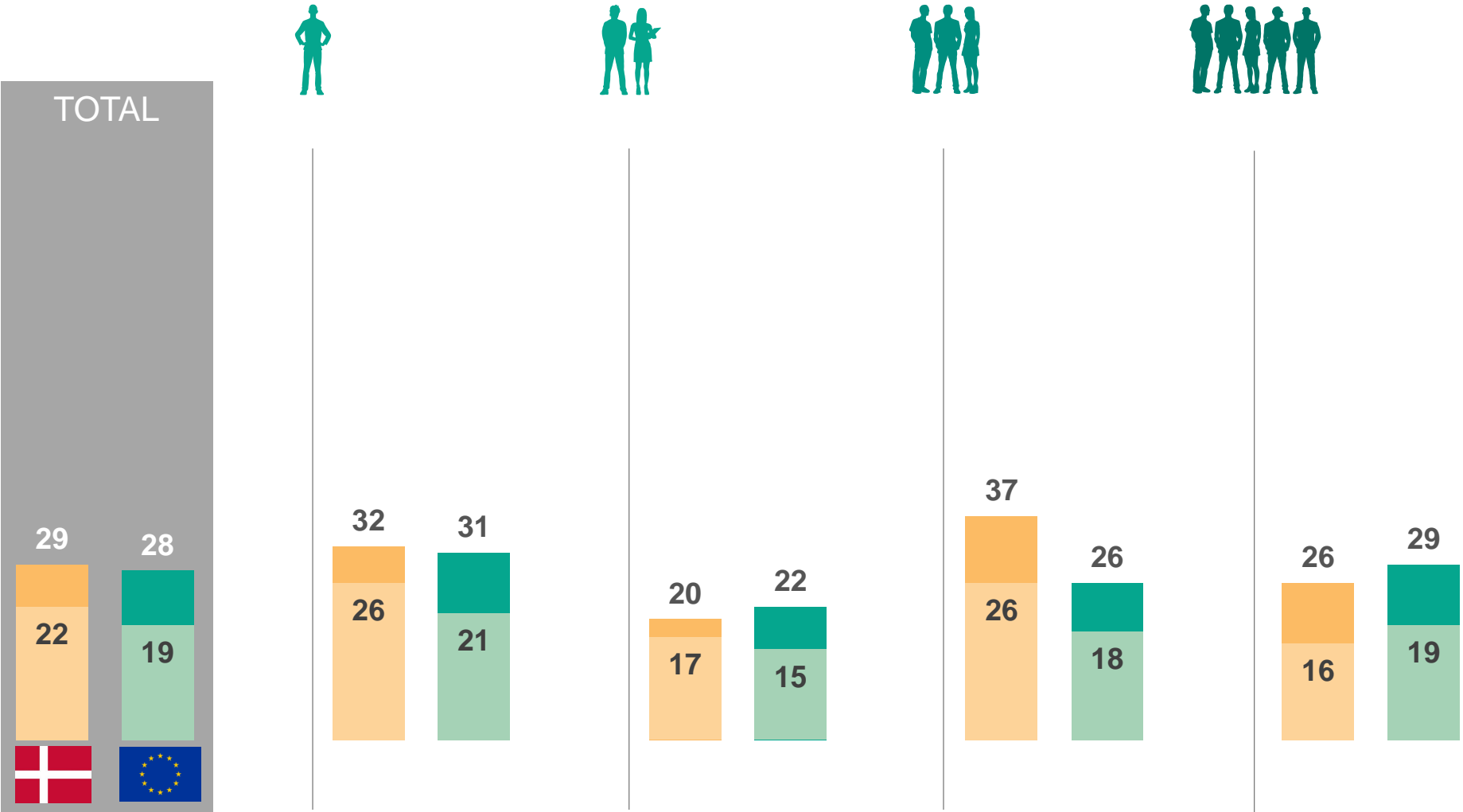
In %



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



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

# BIKE (OR OTHER TWO WHEELS) SHARING / LEASING IMPLEMENTATION

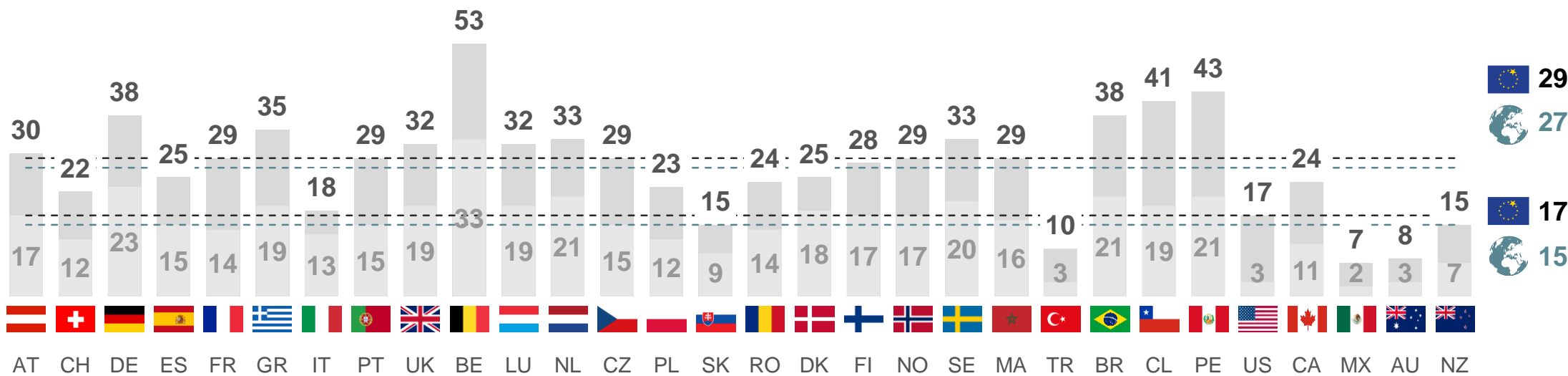
In %



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



EU 29

World 27

EU 17

World 15

Which of the following have you implemented or will you implement in the next 3 years?  
Response scale: Already using, considered in the next 3 years, not interested  
Basis: companies with corporate vehicles = 100%  
Question asked to respondents that are aware of mobility solutions  
104

# BIKE (OR OTHER TWO WHEELS) SHARING / LEASING IMPLEMENTATION

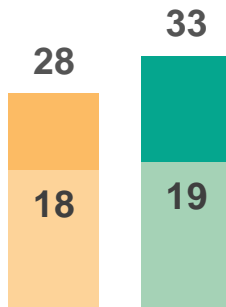
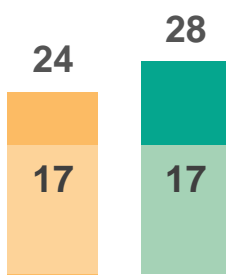
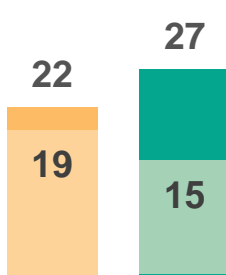
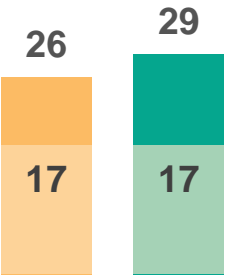
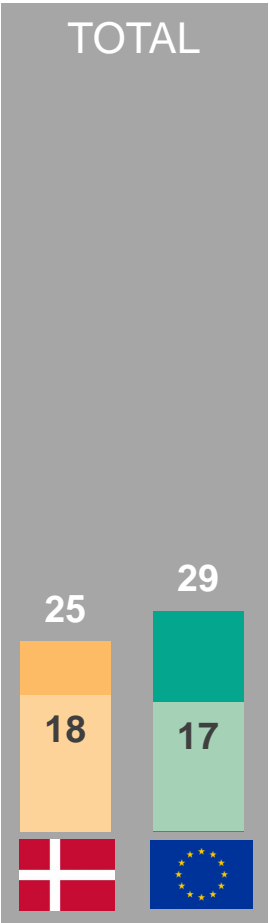
In %



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



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

# PUBLIC TRANSPORT IMPLEMENTATION

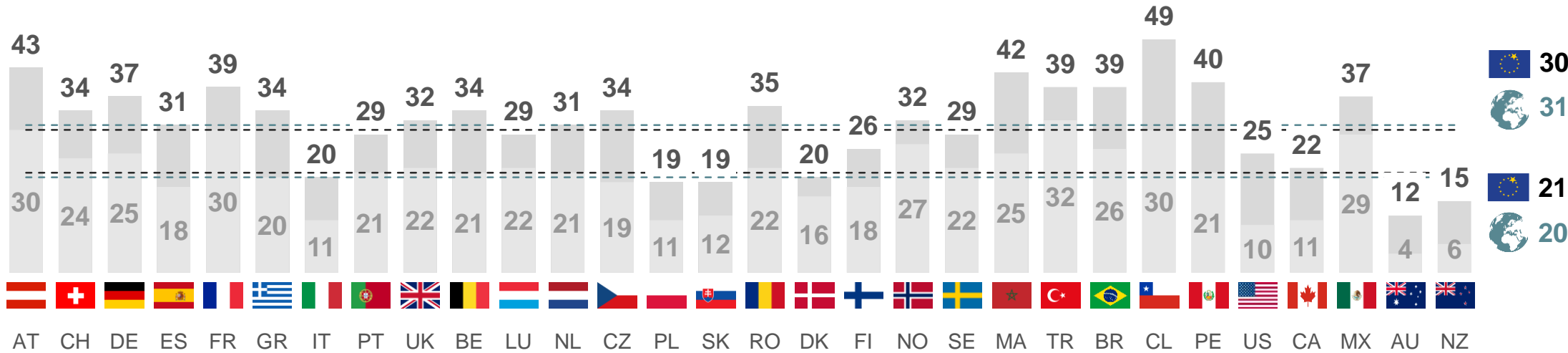
In %



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



EU 30

World 31

EU 21

World 20

Which of the following have you implemented or will you implement in the next 3 years?  
Response scale: Already using, considered in the next 3 years, not interested  
Basis: companies with corporate vehicles = 100%  
Question asked to respondents that are aware of mobility solutions  
106

# PUBLIC TRANSPORT IMPLEMENTATION

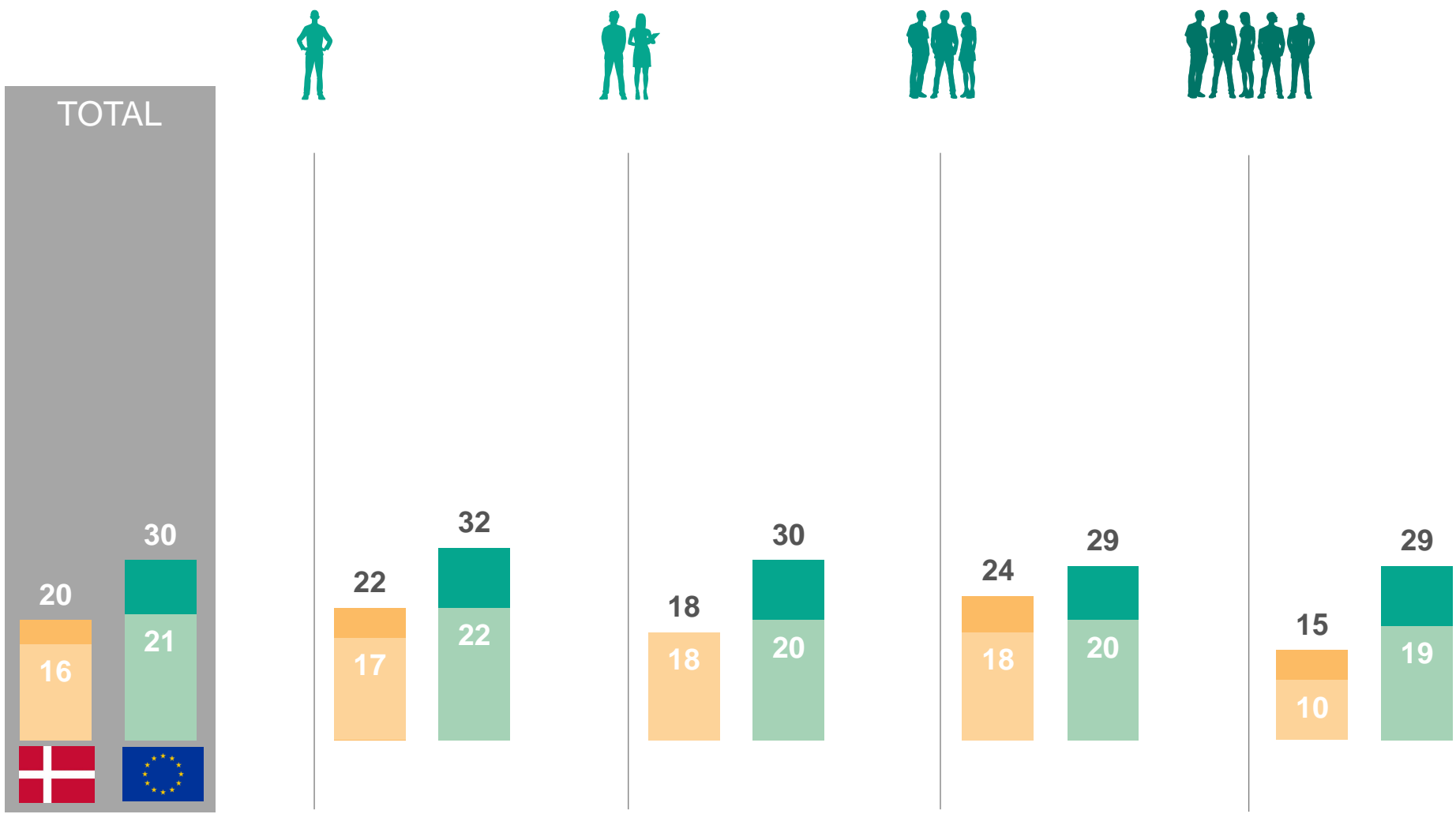
In %



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



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

# MOBILITY BUDGET IMPLEMENTATION

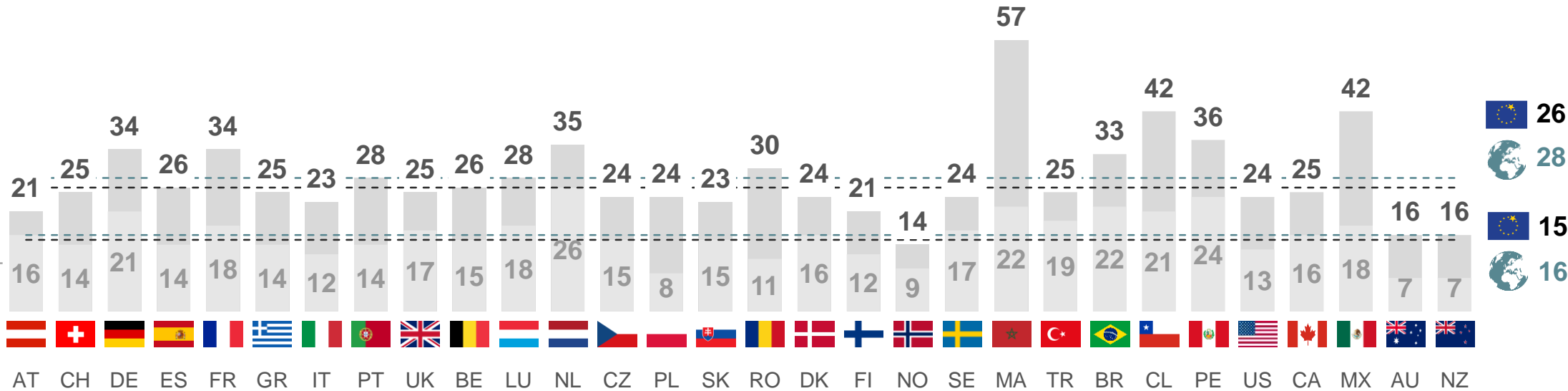
In %



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



Which of the following have you implemented or will you implement in the next 3 years?  
Response scale: Already using, considered in the next 3 years, not interested  
Basis: companies with corporate vehicles = 100%  
Question asked to respondents that are aware of mobility solutions  
108



# MOBILITY BUDGET IMPLEMENTATION

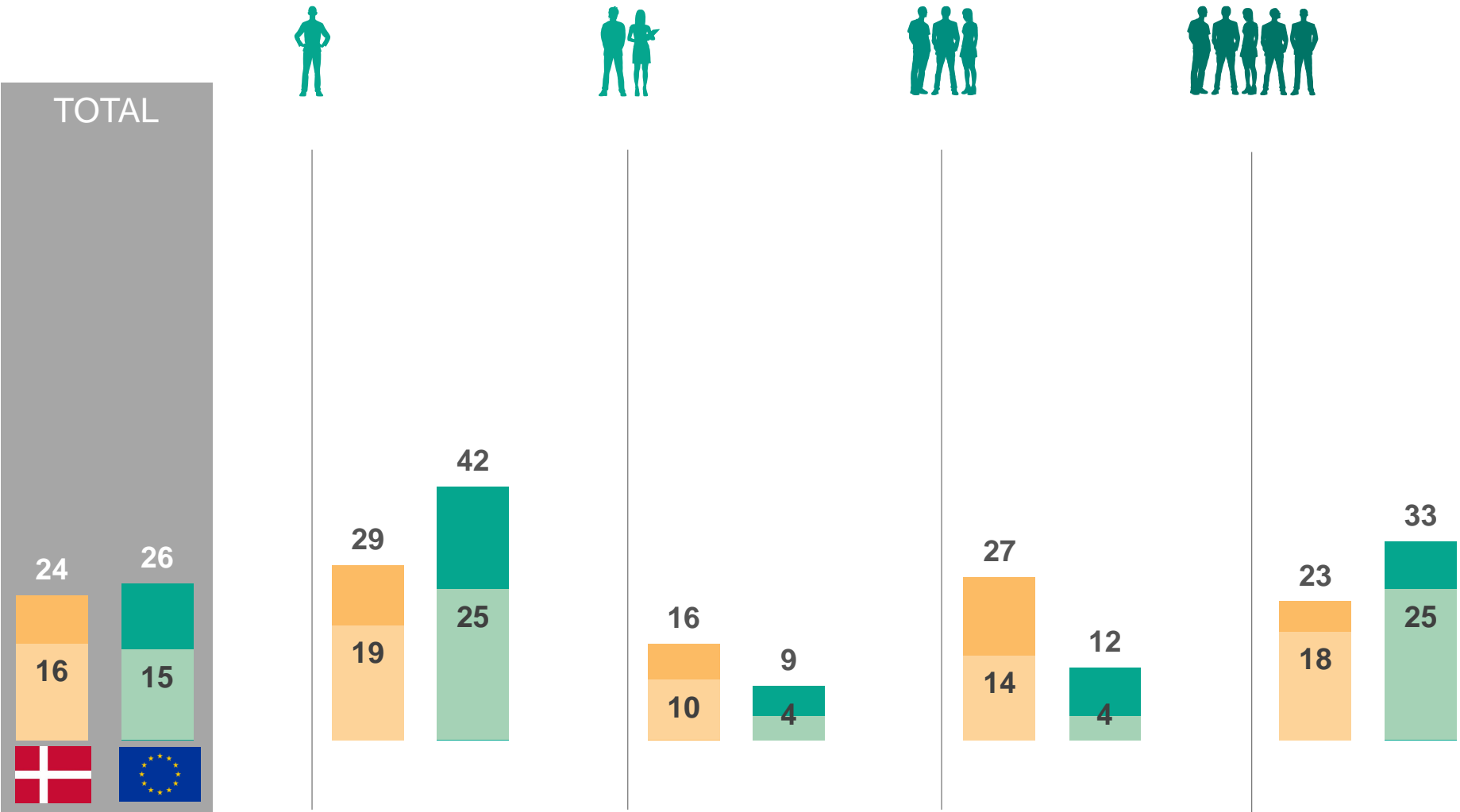
In %



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



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

# AN APP TO BOOK MOBILITY SOLUTIONS IMPLEMENTATION

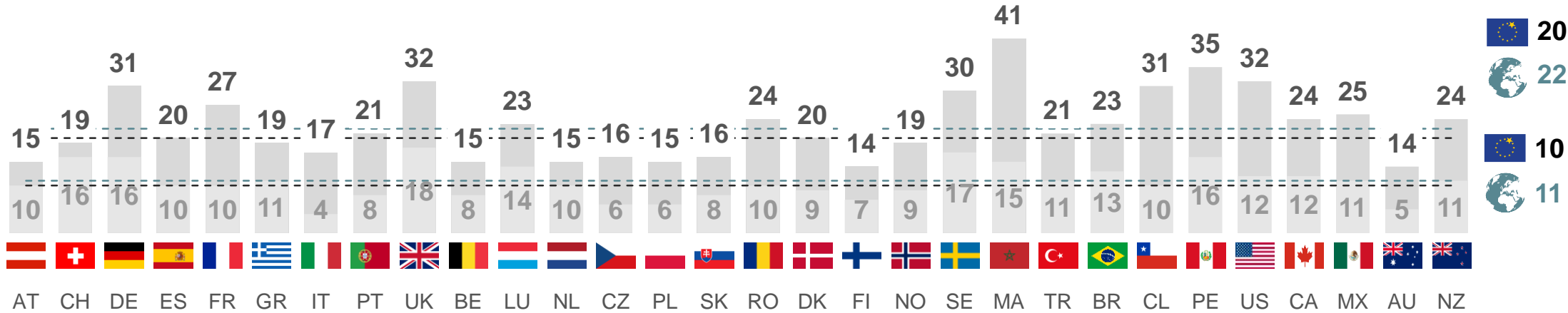
In %



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



EU 20  
Globe 22  
EU 10  
Globe 11

Which of the following have you implemented or will you implement in the next 3 years?  
Response scale: Already using, considered in the next 3 years, not interested  
Basis: companies with corporate vehicles = 100%  
Question asked to respondents that are aware of mobility solutions  
110

# AN APP TO BOOK MOBILITY SOLUTIONS IMPLEMENTATION

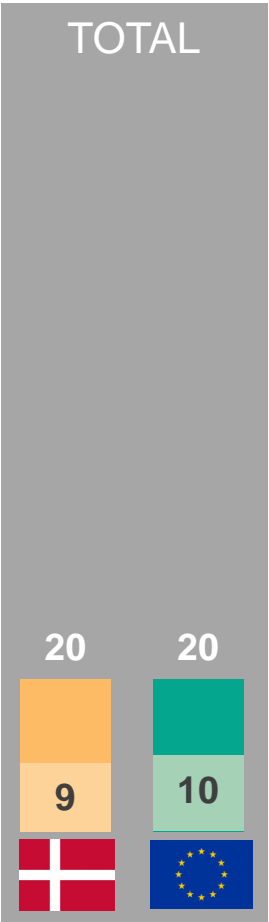
In %



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



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

# PRIVATE LEASE OR SALARY SACRIFICE IMPLEMENTATION

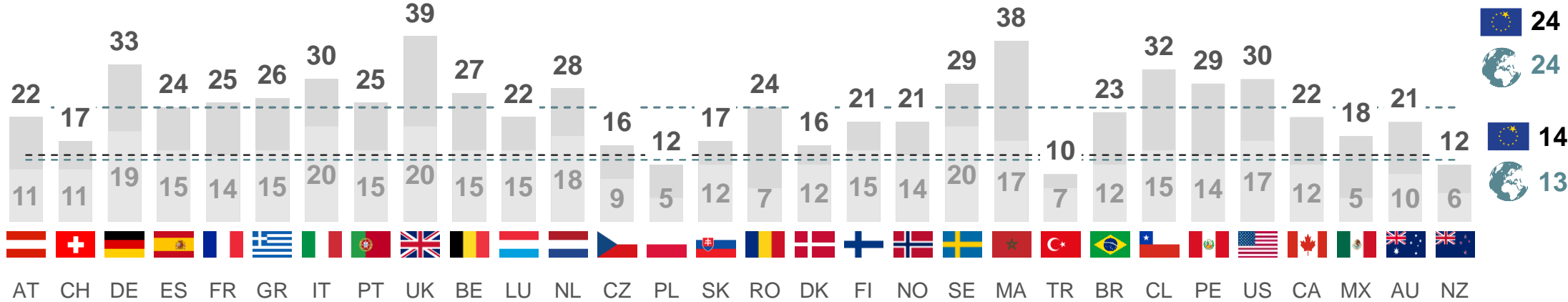
In %



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



Which of the following have you implemented or will you implement in the next 3 years?  
Response scale: Already using, considered in the next 3 years, not interested  
Basis: companies with corporate vehicles = 100%  
Question asked to respondents that are aware of mobility solutions  
112

# PRIVATE LEASE OR SALARY SACRIFICE IMPLEMENTATION

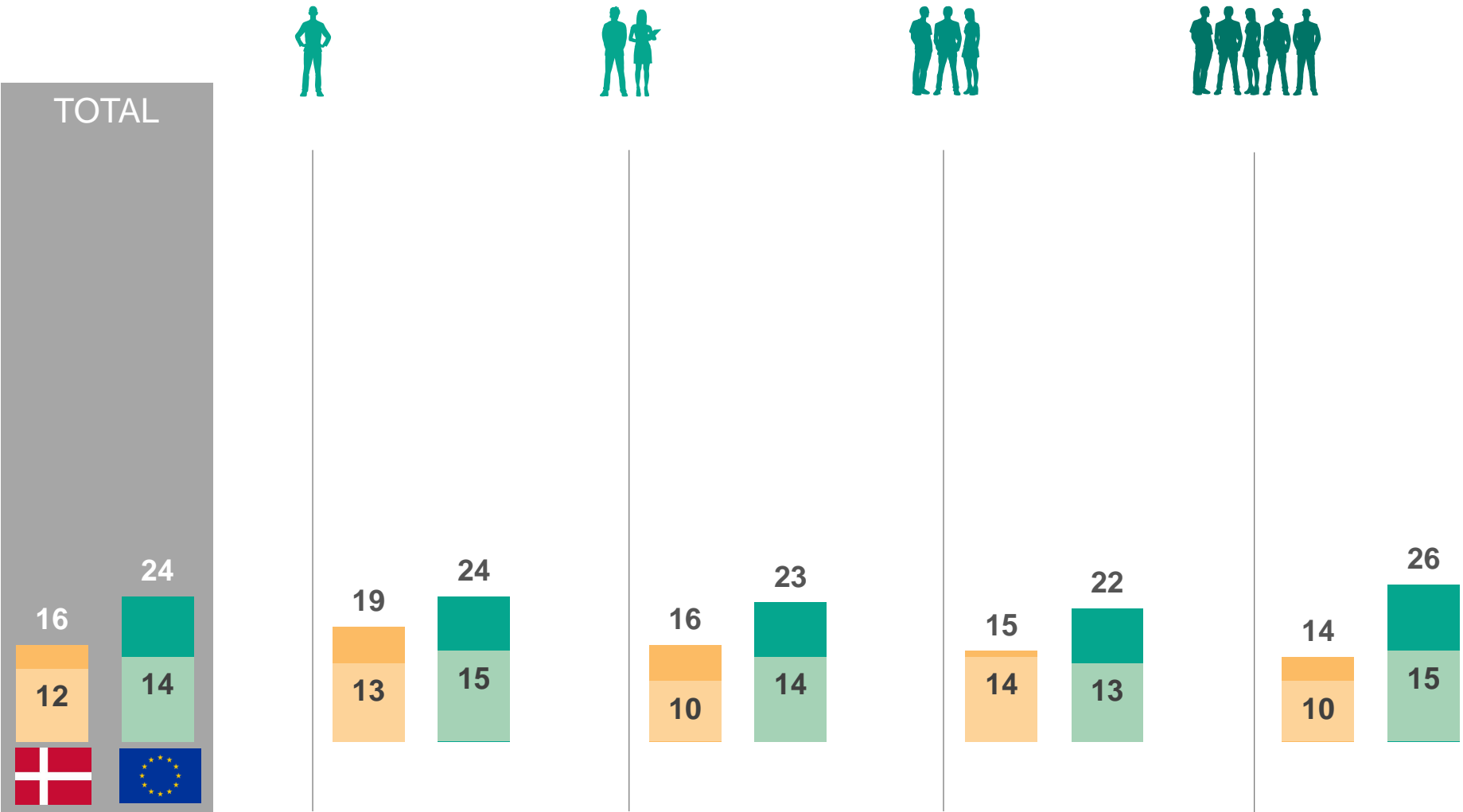
In %



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



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

# SHORT OR MID-TERM RENTAL VEHICLES IMPLEMENTATION

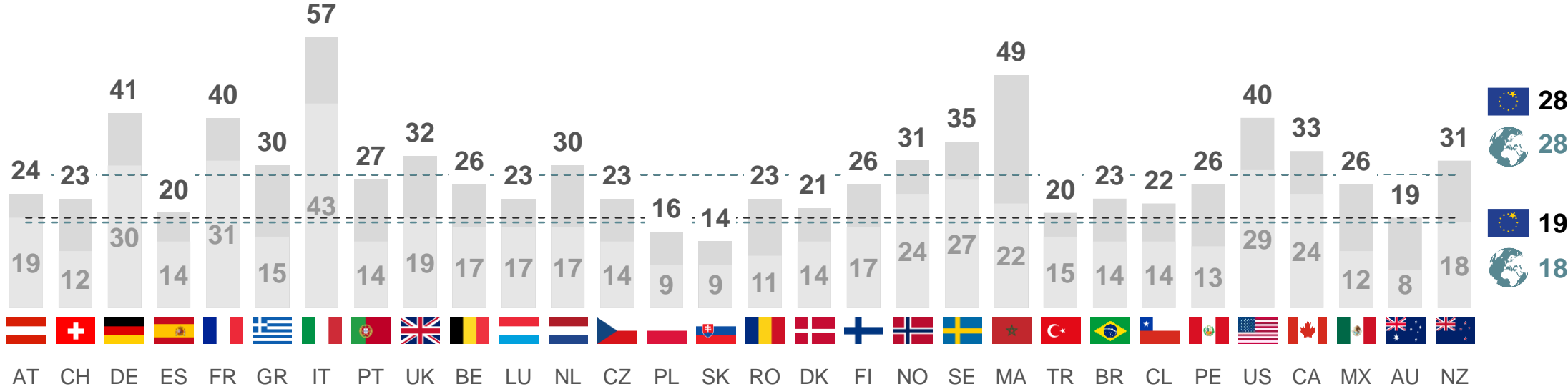
In %



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



28



28

19



18

Which of the following have you implemented or will you implement in the next 3 years?  
Response scale: Already using, considered in the next 3 years, not interested  
Basis: companies with corporate vehicles = 100%  
Question asked to respondents that are aware of mobility solutions  
114

# SHORT OR MID-TERM RENTAL VEHICLES IMPLEMENTATION

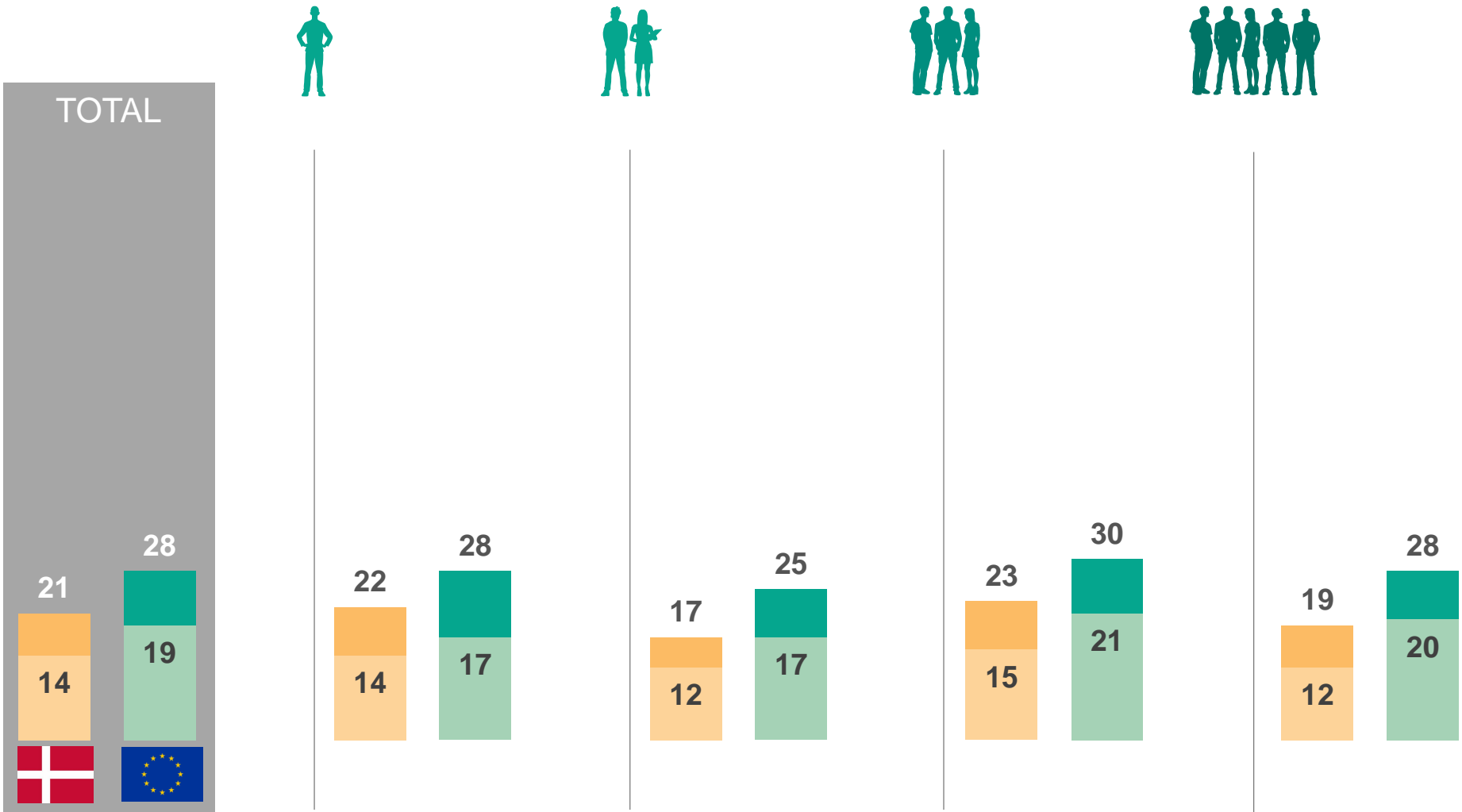
In %



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



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

# CAR OR CASH ALLOWANCE IMPLEMENTATION

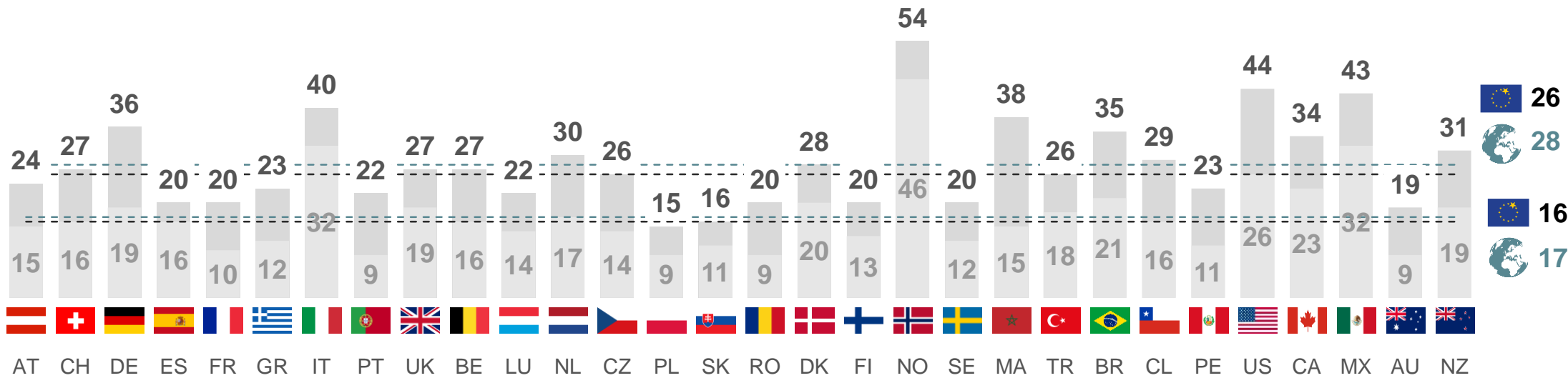
In %



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



EU 26  
Globe 28  
EU 16  
Globe 17

Which of the following have you implemented or will you implement in the next 3 years?  
Response scale: Already using, considered in the next 3 years, not interested  
Basis: companies with corporate vehicles = 100%  
Question asked to respondents that are aware of mobility solutions  
116



# CAR OR CASH ALLOWANCE IMPLEMENTATION

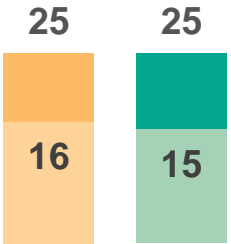
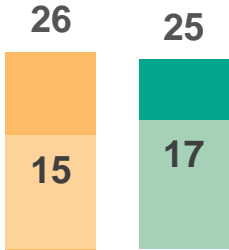
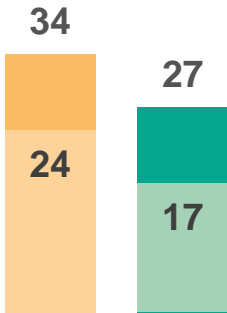
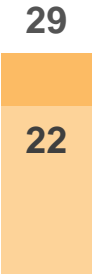
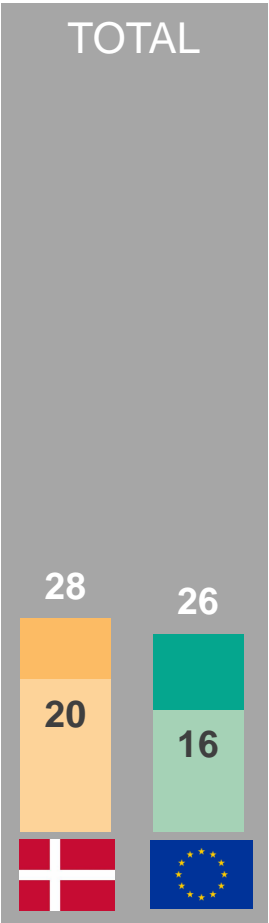
In %



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



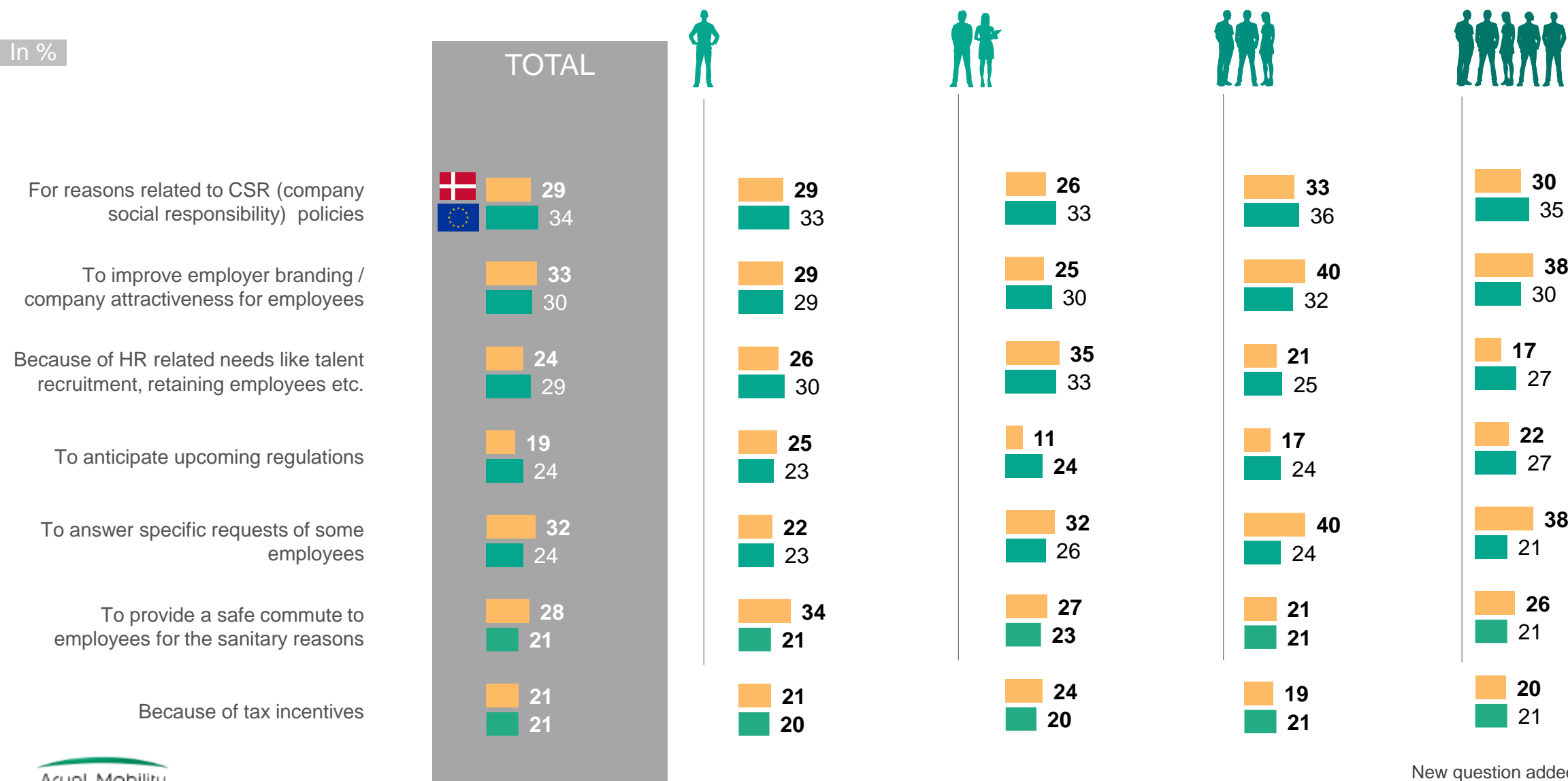
ALREADY  
USING



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

# REASONS FOR IMPLEMENTING OR CONSIDERING MOBILITY SOLUTIONS

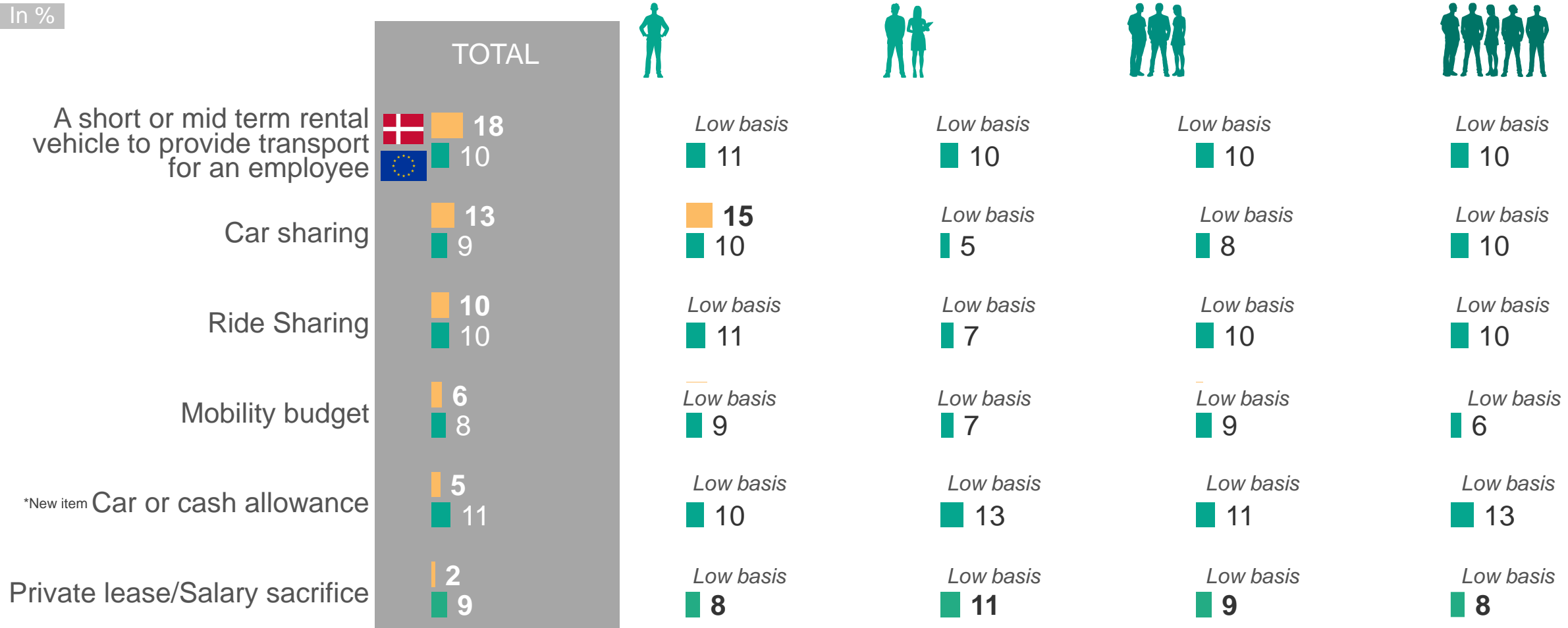
In %



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

Certainly

In %



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

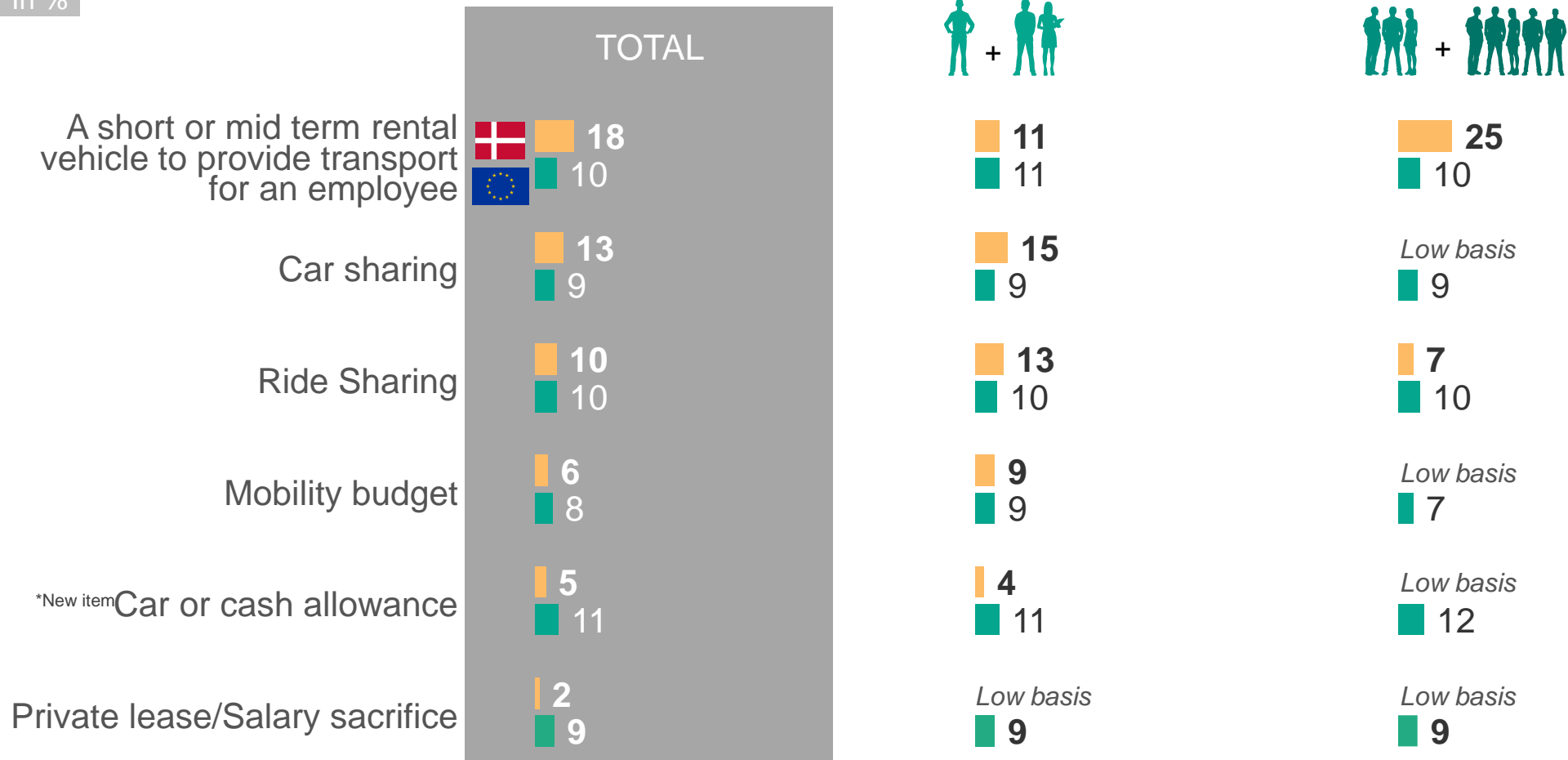
**Basis: companies using or considering at least one mobility solution**

Question asked to respondents that are aware of mobility solutions

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

Certainly

In %

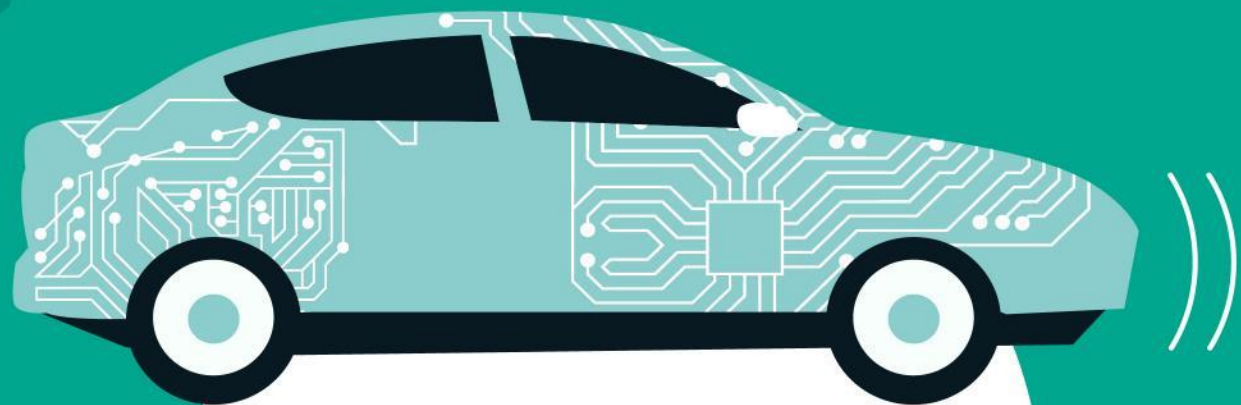


Would you anticipate that your company would give up all or part of the company car fleet for such alternatives?

**Basis: companies using or considering at least one mobility solution**

Question asked to respondents that are aware of mobility solutions

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



# AN INCREASING USE OF TELEMATICS IN ORDER TO LOCATE VEHICLES AND IMPROVE VEHICLE SAFETY

1

- In line with the European trend, **the use of telematics has highly increased in Denmark in 2023** : almost 40% of companies are now equipped (versus 26% last year).

**This growth is mainly due to a higher equipment of passenger cars**, which are now as equipped as LCVs.

2

- The main reason for telematics adoption is the **vehicle's security**, for both passenger cars and LCVs.  
Small companies are then more interested in reducing fleet costs, while large companies focus on drivers safety and behaviours.

# CONNECTED VEHICLES



## USE OF TELEMATICS



39%

26



44%

33



## TOP 3 REASONS



47%

30



37%

#1 To locate vehicles or improve vehicle security

#2 To reduce fleet costs

26%

25%

#3 To improve drivers safety / behaviours

25%

30%

# PROPORTION OF COMPANIES USING CONNECTED VEHICLES

All vehicles

In %

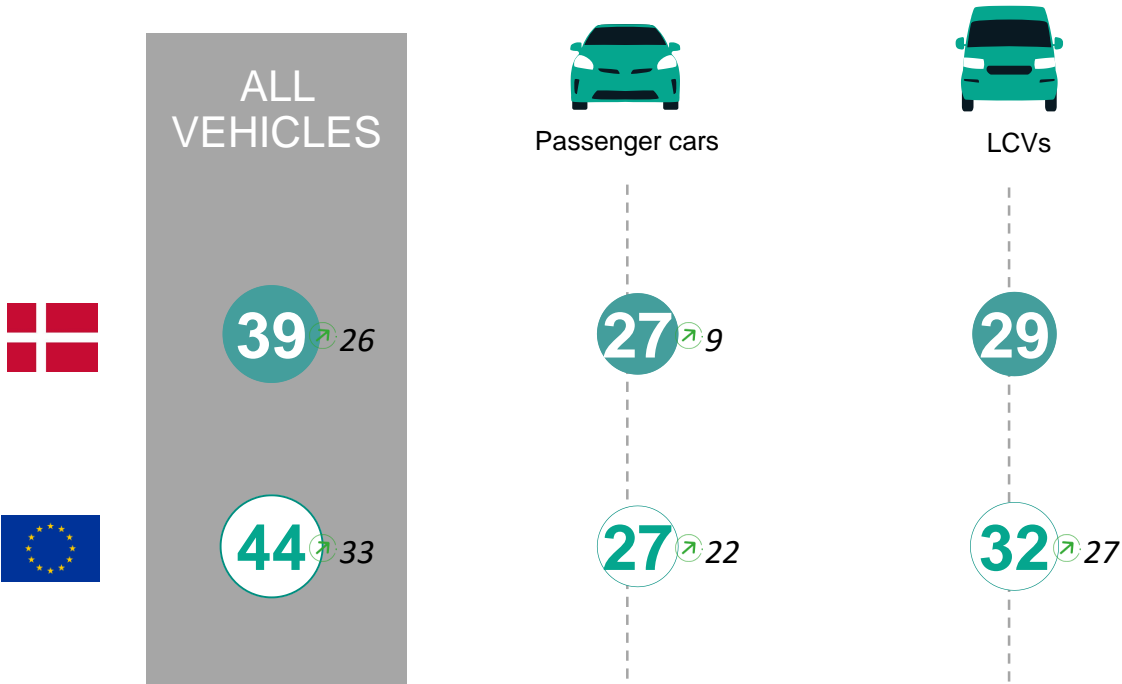


Passenger cars + LCVs

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

HOW TO READ THE RESULTS ?

39% of companies with fleet using connected vehicles for all or part of their fleet.  
27% use connected vehicles for passenger cars, while 29% use connected vehicles for LCVs.



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



# PROPORTION OF COMPANIES USING CONNECTED VEHICLES

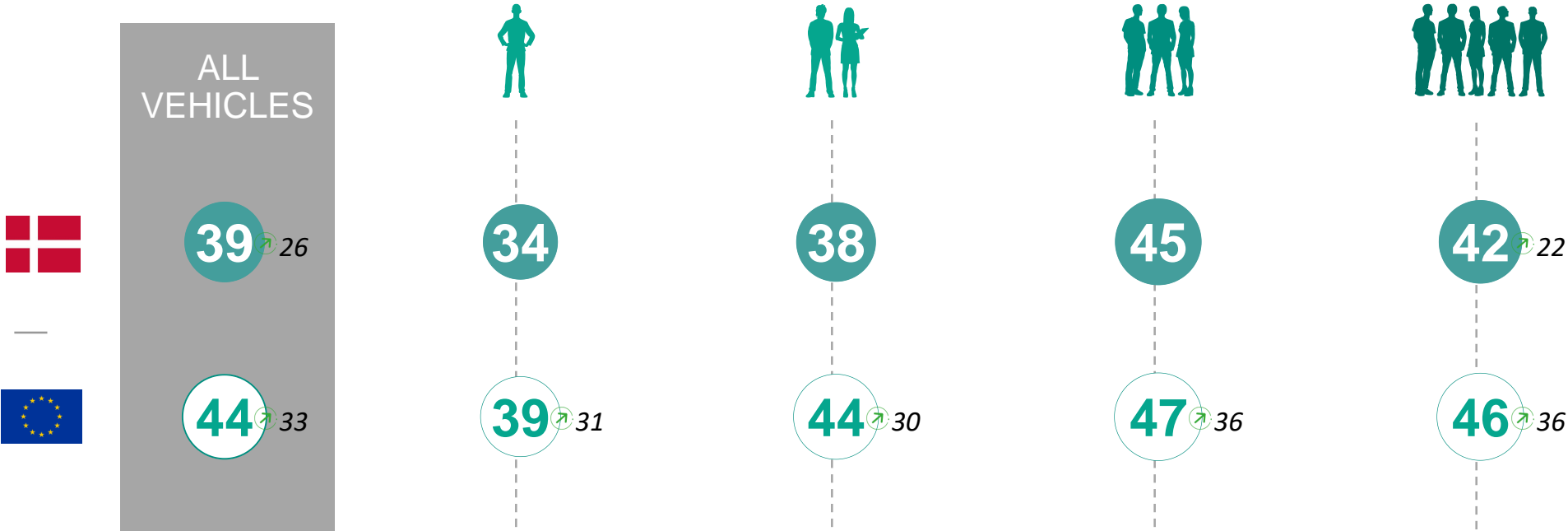
All vehicles

In %



Passenger cars + LCVs

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



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

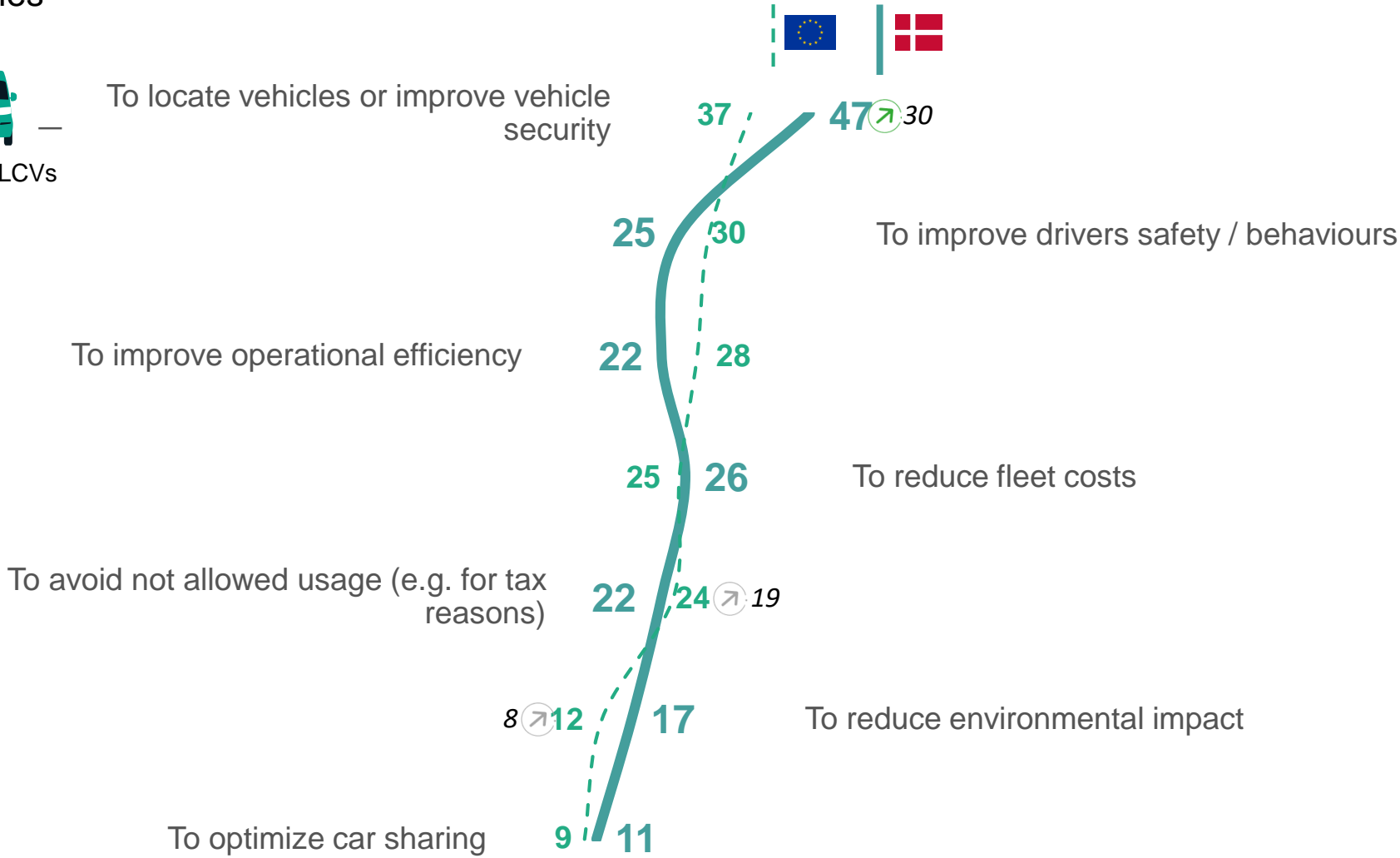
# REASONS FOR USING CONNECTED VEHICLES

All vehicles

In %



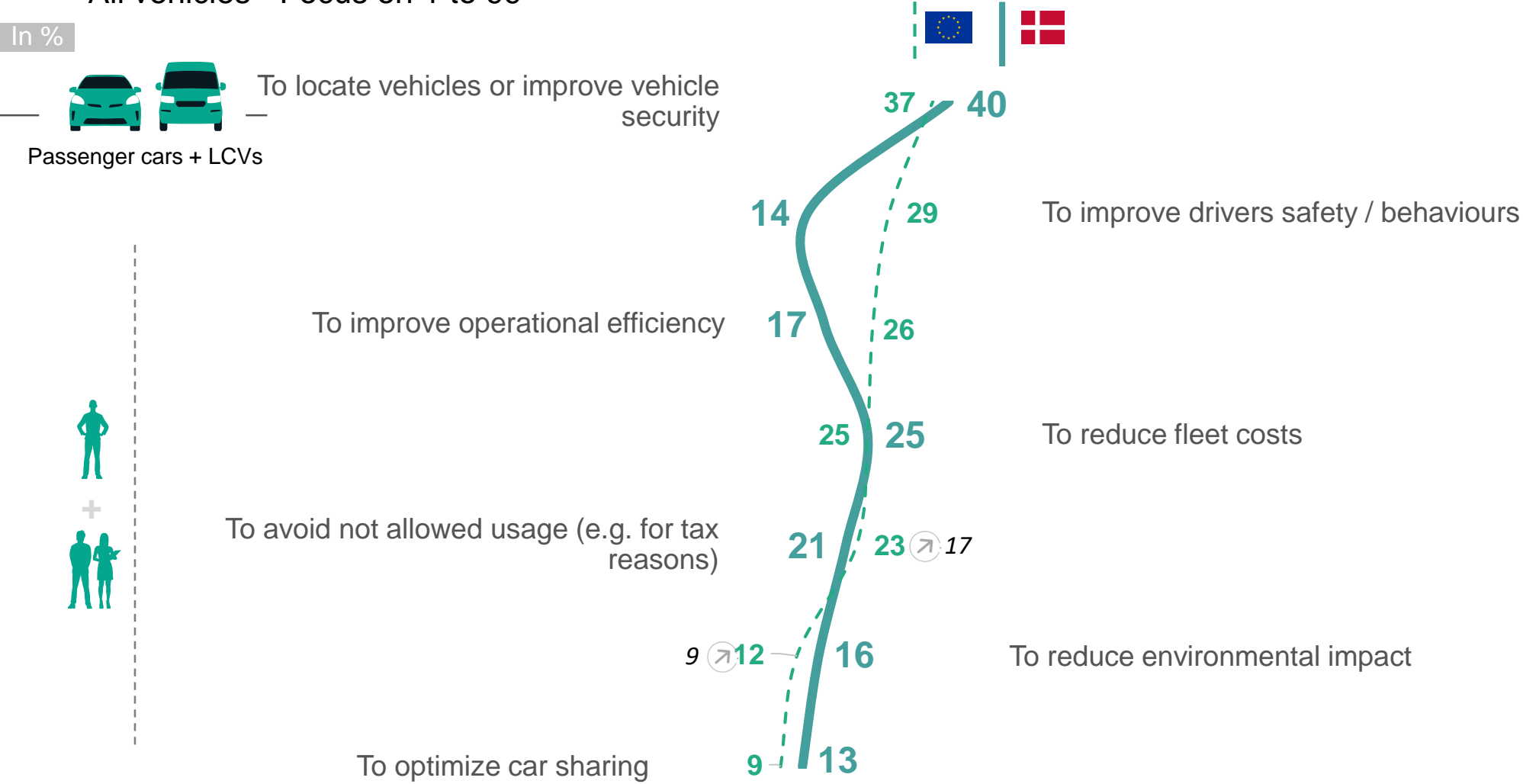
Passenger cars + LCVs



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

# REASONS FOR USING CONNECTED VEHICLES

All vehicles - Focus on 1 to 99

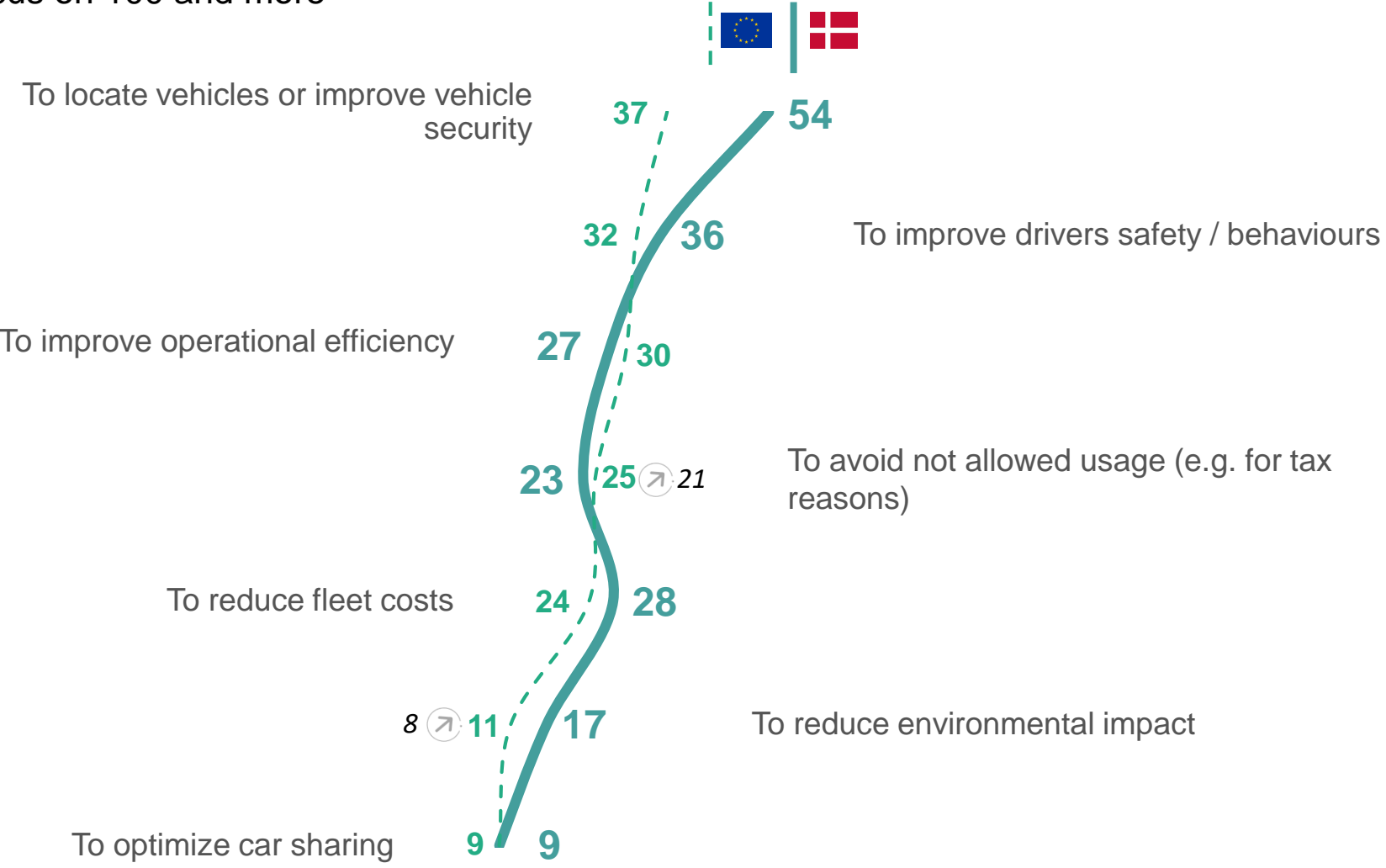


What are the two main reasons why your fleet is connected by Telematics?  
Basis: companies with connected vehicles thanks to Telematics

# REASONS FOR USING CONNECTED VEHICLES

All vehicles - Focus on 100 and more

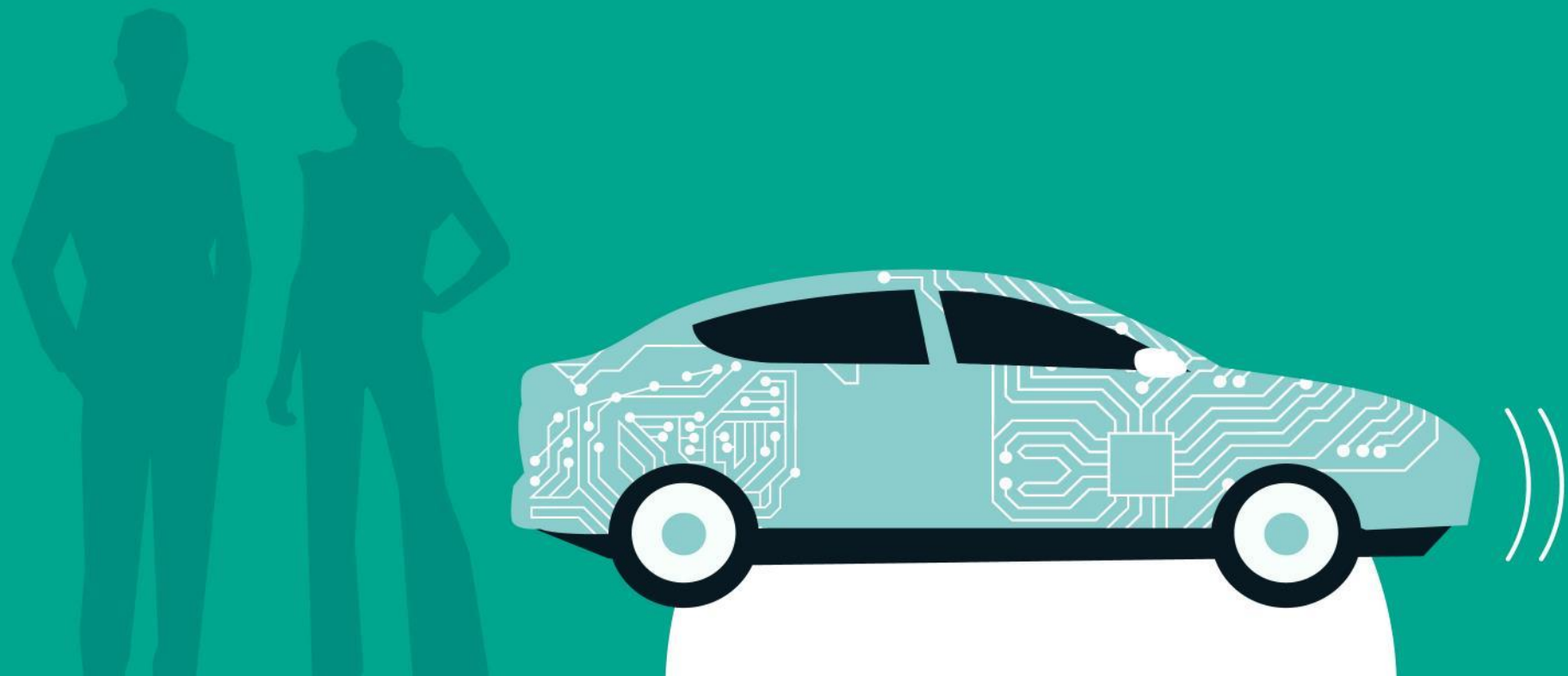
In %



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

# CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY

## A. PASSENGER CARS



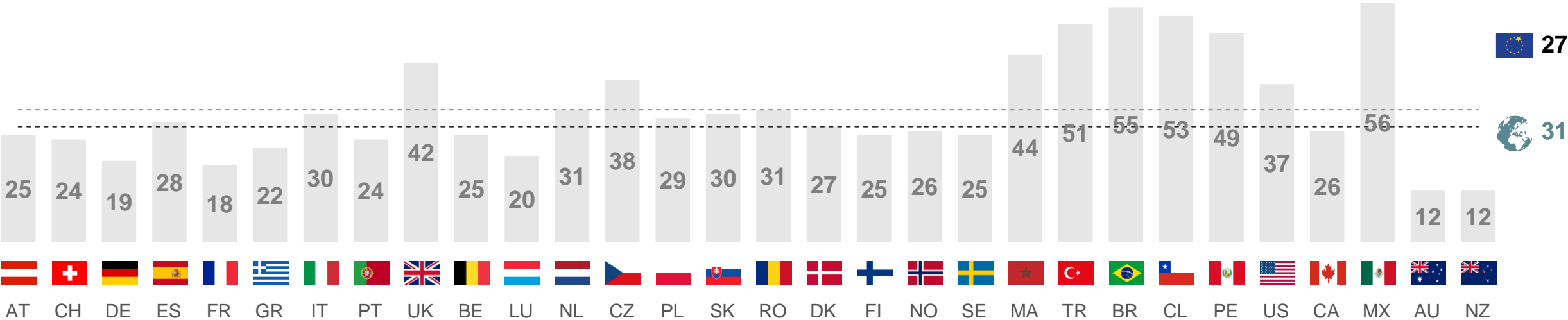
# PROPORTION OF COMPANIES USING CONNECTED VEHICLES

Passenger cars

In %



PROPORTION OF COMPANIES USING  
CONNECTED VEHICLES FOR THEIR PASSENGER  
CARS



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

# PROPORTION OF COMPANIES USING CONNECTED VEHICLES

## Passenger cars

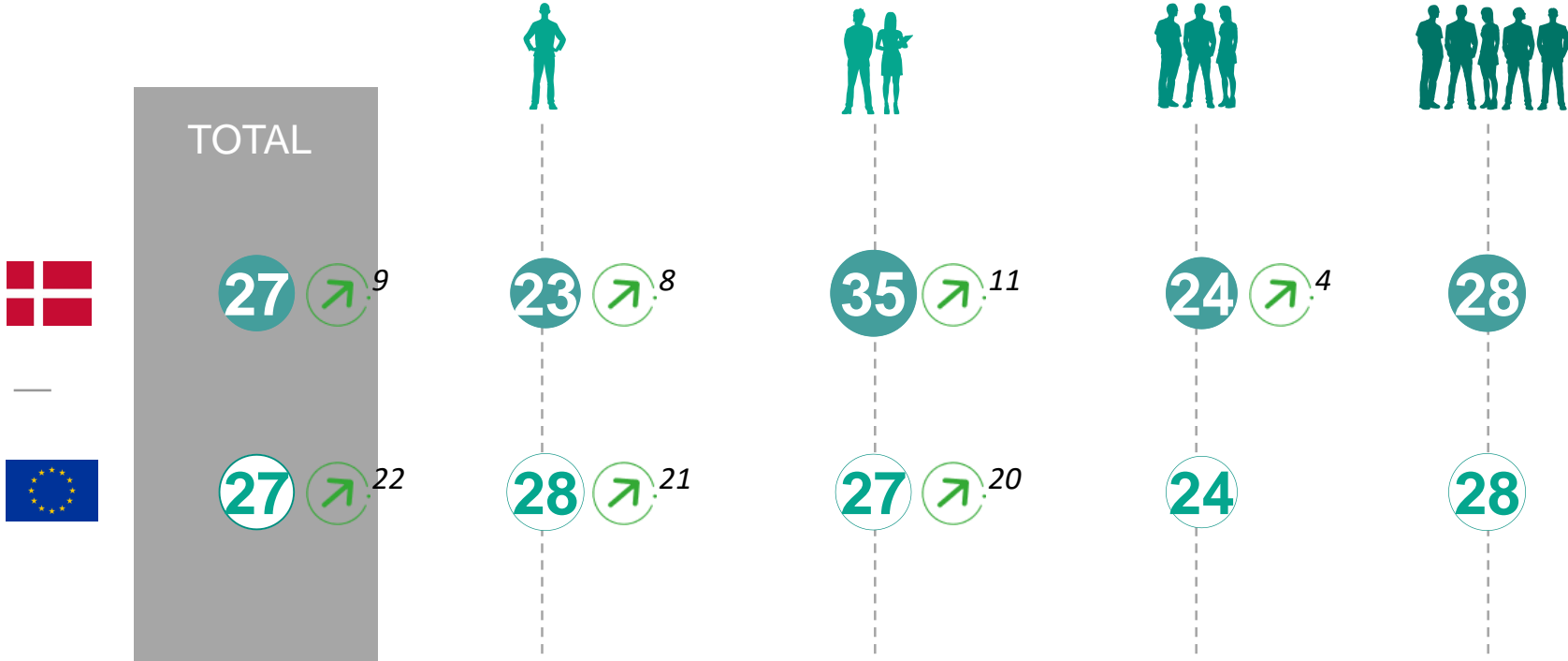
In %



Passenger cars

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

HOW TO READ THE RESULTS ?  
27% use connected vehicles for passenger cars.



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 passenger car in fleet**

# REASONS FOR USING CONNECTED VEHICLES

## Passenger cars

In %



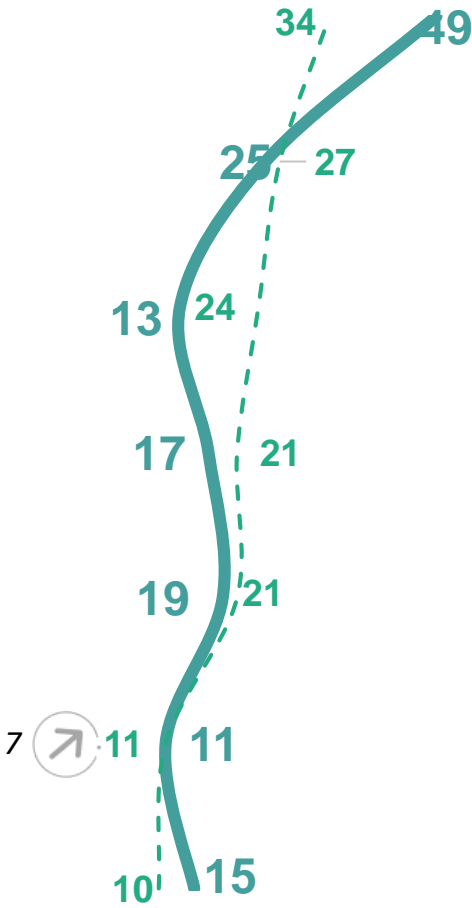
Passenger cars

To locate vehicles or improve vehicle security

To improve operational efficiency

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

To optimize car sharing



To improve drivers safety / behaviours

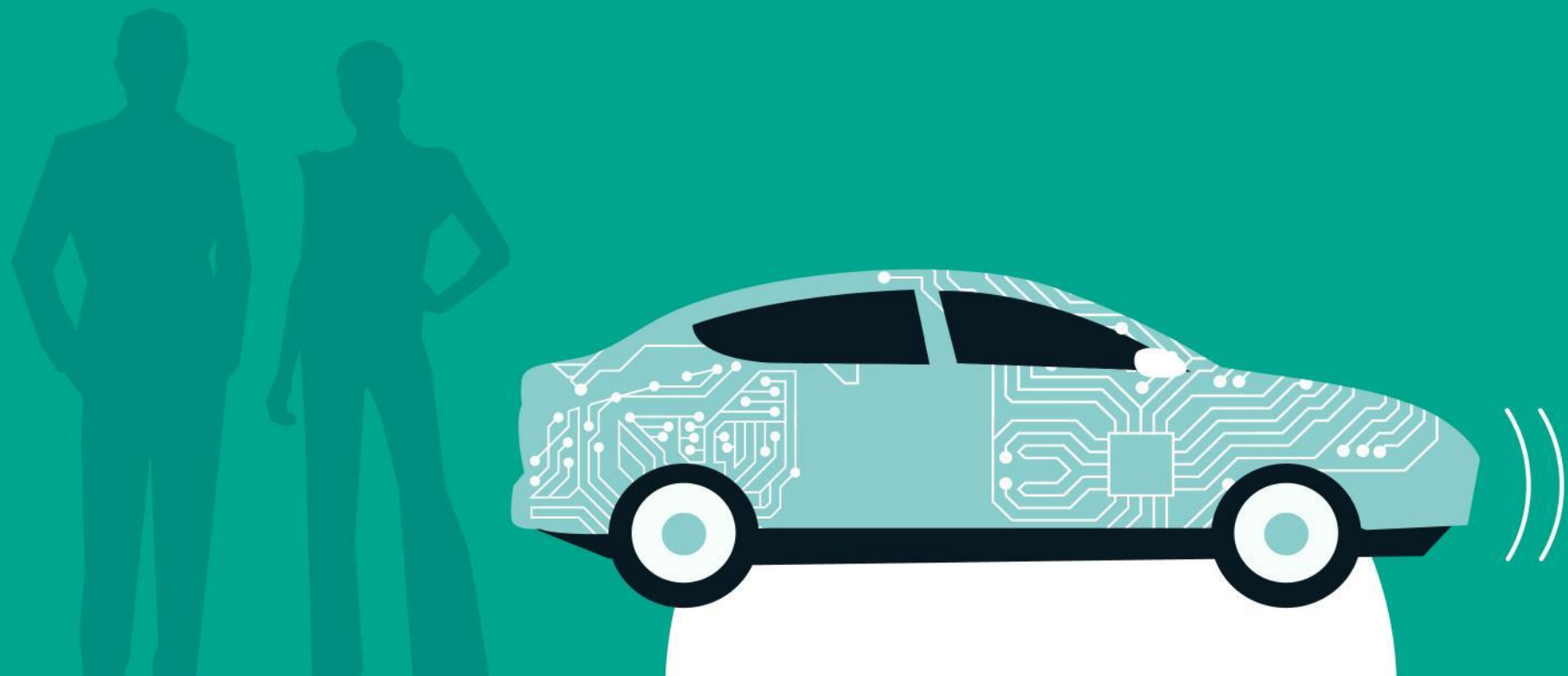
To reduce fleet costs

To reduce environmental impact



# CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY

## B. LCVs



# PROPORTION OF COMPANIES USING CONNECTED VEHICLES

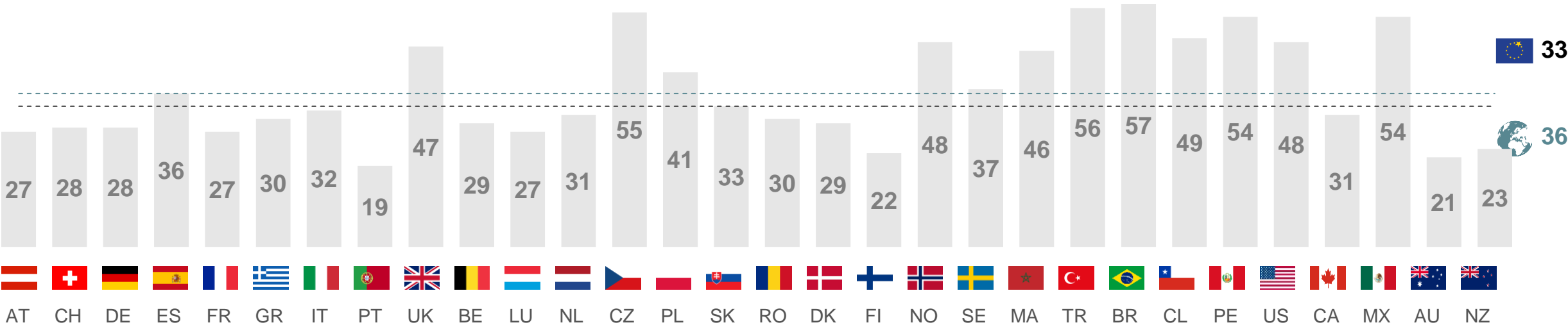
LCVs

In %



LCVs

PROPORTION OF COMPANIES USING  
CONNECTED VEHICLES FOR THEIR LCVs



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

# PROPORTION OF COMPANIES USING CONNECTED VEHICLES

LCVs

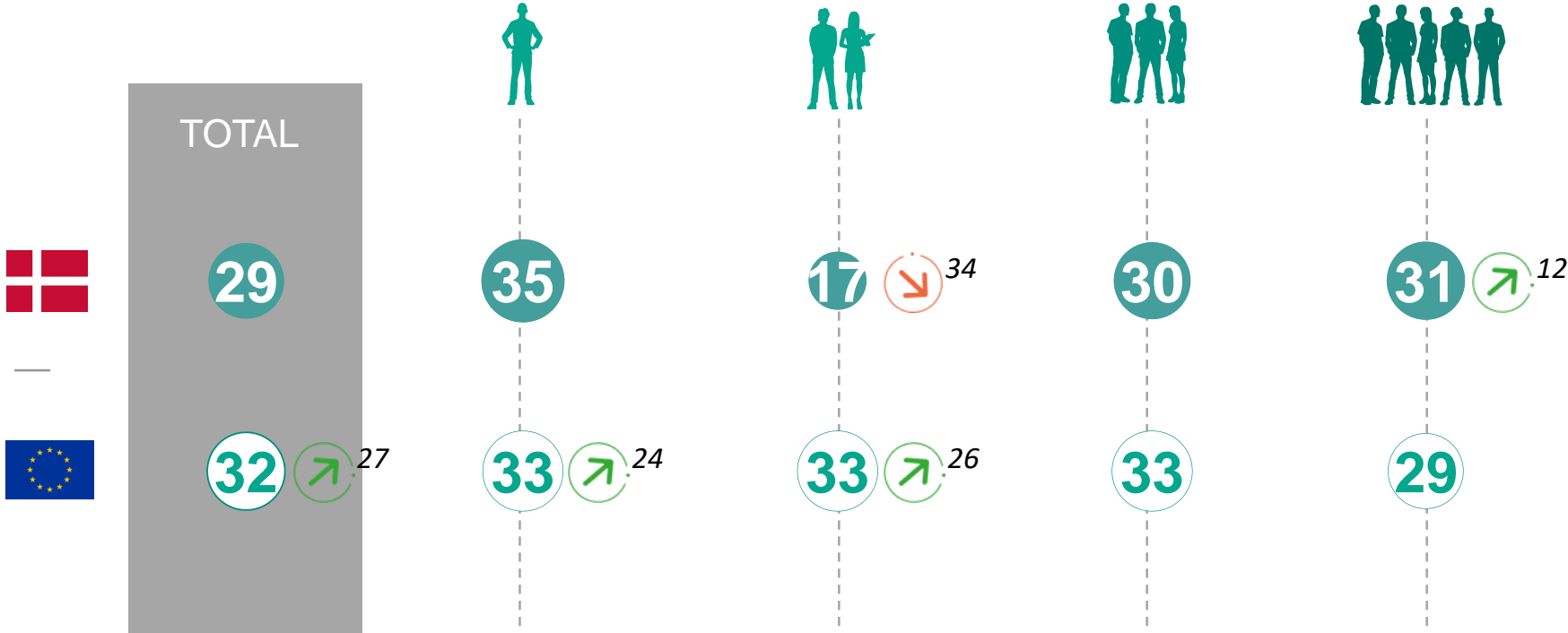
In %



LCVs

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

HOW TO READ THE RESULTS ?  
29% use connected vehicles for LCVs.



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

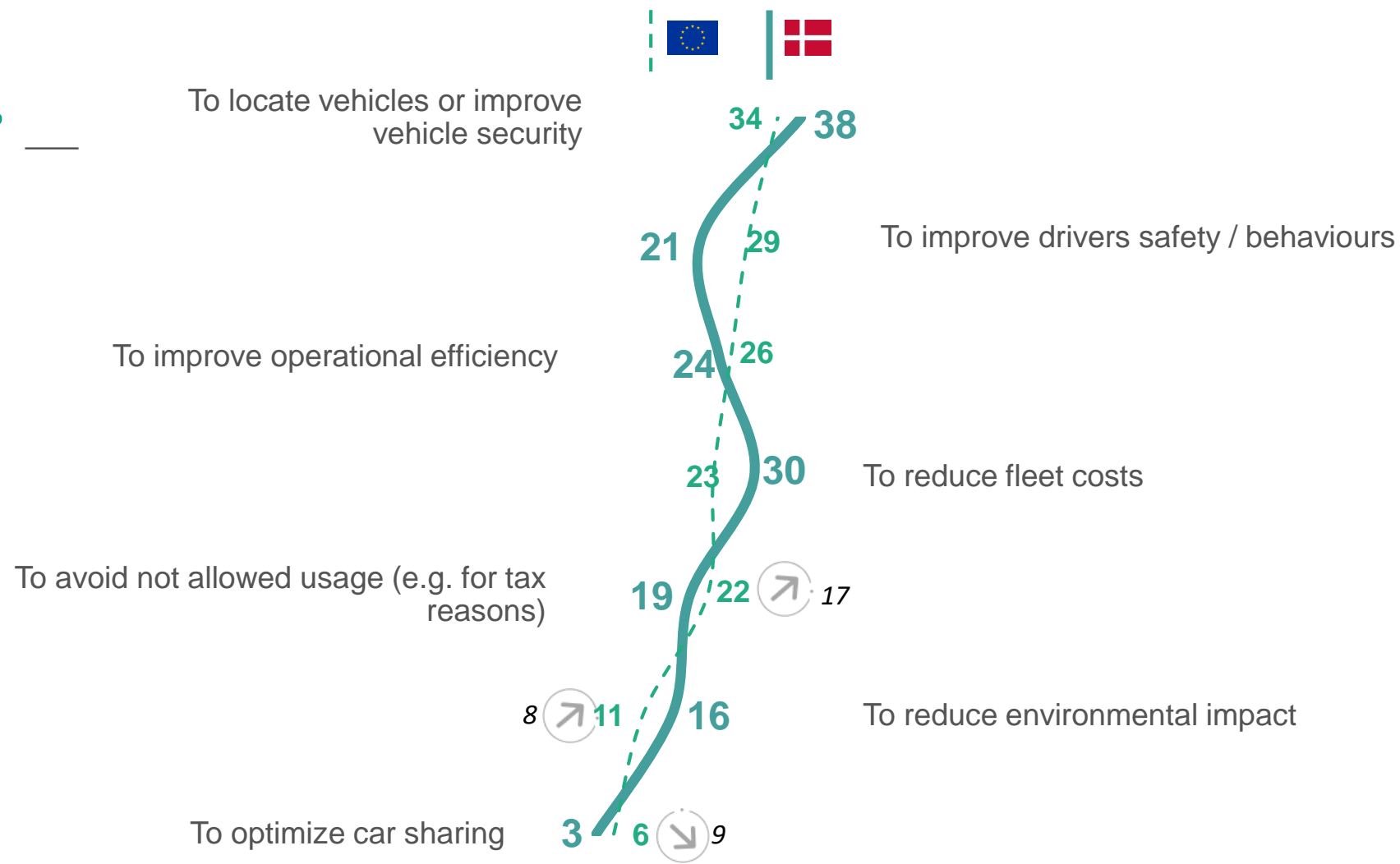
# REASONS FOR USING CONNECTED VEHICLES

LCVs

In %



LCVs



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





Thank you



# APPENDIX

