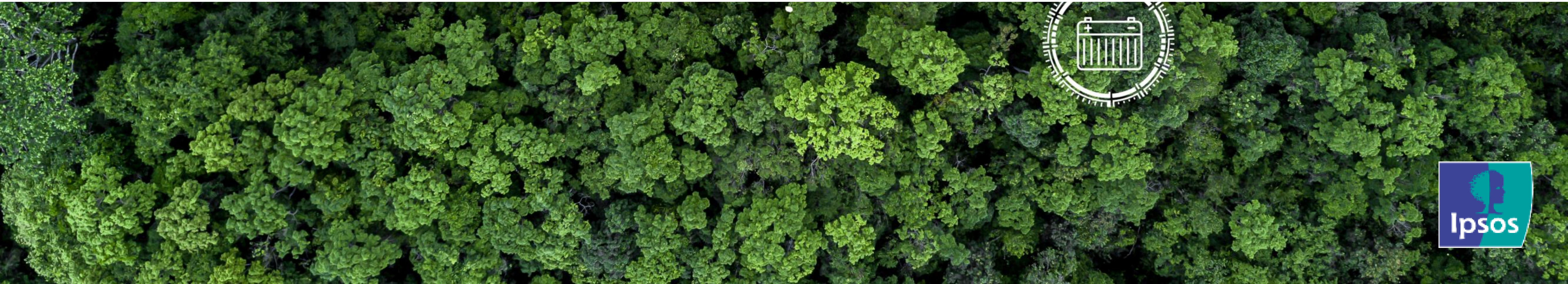
Arval Mobility Observatory

MOBILITY AND FLEET BAROMETER 2024



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1

CONTEXT AND METHODOLOGY

KEY THEMES FOR ARVAL MOBILITY OBSERVATORY

1

WHAT SHORT TERM SHIFTS ARE SHAPING THE MARKET?

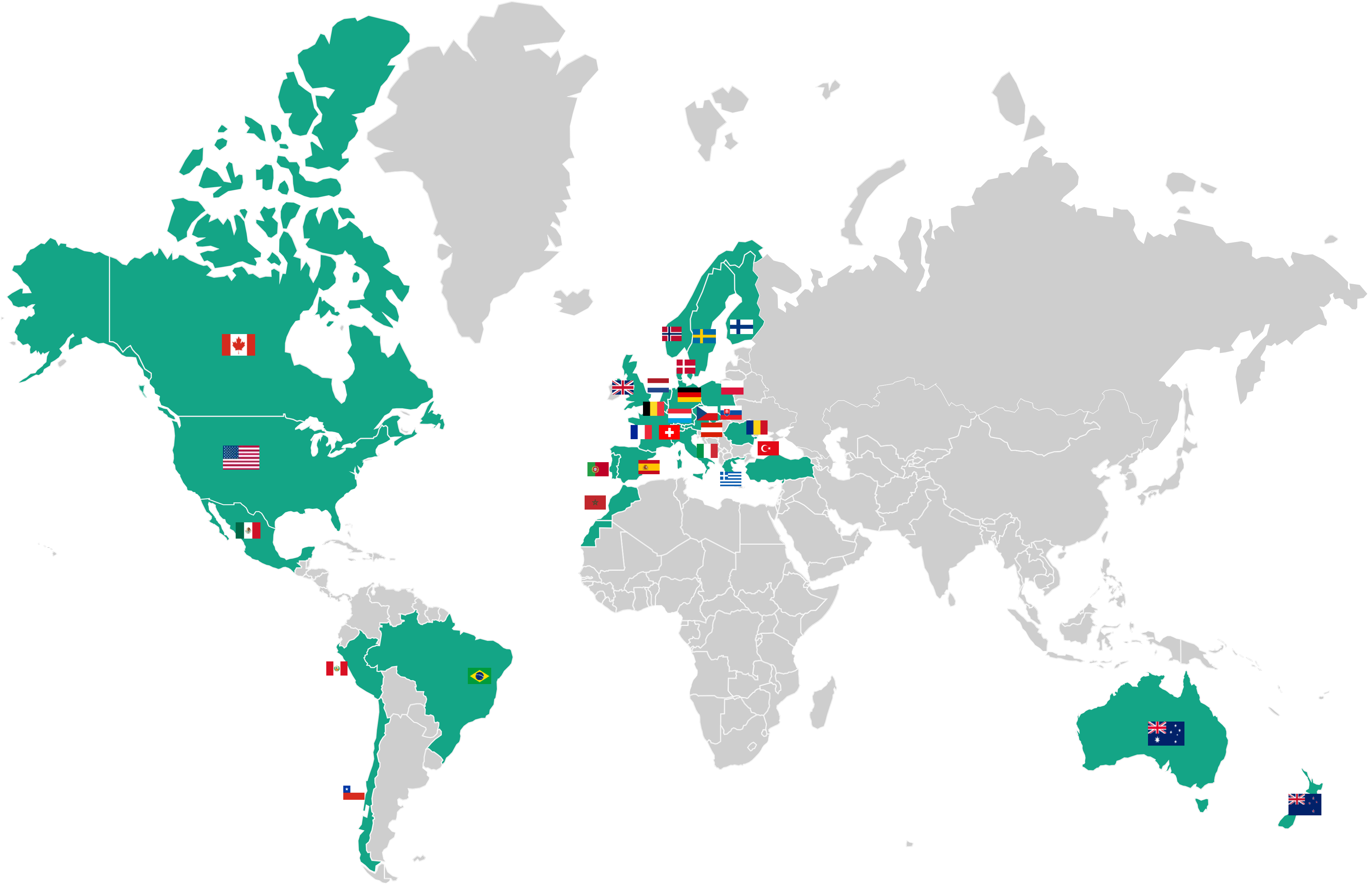
2

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

3

HOW DO MOBILITY SOLUTIONS IMPACT FLEET MANAGEMENT?

SCOPE OF THE SURVEY : 30 COUNTRIES



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COMPANY SIZE SEGMENT DEFINITION

WORLD

EUROPE | OUT OF EUROPE

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

METHODOLOGY

DATA COLLECTION METHOD	FIELDWORK PERIOD	TARGET	QUOTAS	SAMPLE	DURATION OF INTERVIEW
CATI SYSTEM (Computer Assisted Telephone Interviewing) Recruitment by telephone	SEPT 18 → oct 26	COMPANY FLEET DECISION MAKERS in companies of all industries using at least 1 CORPORATE VEHICLE	COMPANY SIZE & SECTOR	5854 Europe 1650 Americas 1101 Rest of the world (TR,MA,AU,NZ) **8605** Interviews in total	**26** minutes on average

READING NOTES ABOUT THE REPORT

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

↗ XX	Significantly higher than 2023 year
▲ XX	Significantly higher than 2022 year
↘ XX	Significantly lower than 2023 year
▼ XX	Significantly lower than 2022 year

XX = score 2023 or 2022

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

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

NUMBER OF INTERVIEWS CONDUCTED IN DENMARK

Perimeter of the survey: companies owning at least 1 vehicle

Companies with Less than 10 empl.
101 INTERVIEWS

Companies with 10 - 99 empl.
61 INTERVIEWS

Companies with 100 - 249 empl.
80 INTERVIEWS

Companies with 250 empl. or more
58 INTERVIEWS

1 to 99 employees
162 INTERVIEWS

100 employees and more
138 INTERVIEWS

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SAMPLE STRUCTURE IN DENMARK

Company size & sector

In %

					TOTAL
Construction Building Construction General Contractors And Operative Builders / Heavy Construction Other Than Building Construction Contractors / Construction Special Trade Contractors	13	13	13	13	13
Industry Mining, oil & gas, Manufacturing (e.g. food, tobacco, textile, wood, furniture, printing, publishing, chemicals, fabricated metal products, electronic, machinery, etc…)	32	32	32	32	32
Services Finance / transportation / Hotels, Rooming Houses, Camps, And Other Lodging Places / Personal Services / Business Services / Automotive Repair, Services, And Parking / Motion Pictures / Amusement And Recreation Services / Health Services / Legal Services / Social Services / Museums, Art Galleries, And Botanical And Zoological Gardens / Membership Organizations / Engineering, Accounting, Research, Management, And Related Services / Private Households	34	34	34	34	34
Trade Building Materials, Hardware, Garden Supply, And Mobile Home Dealers / General Merchandise Stores Food Stores / Automotive Dealers And Gasoline Service Stations / Apparel And Accessory Stores / Home Furniture, Furnishings, And Equipment Stores / Eating And Drinking Places / Miscellaneous / Retail / Wholesale trade	21	21	21	21	21
Weight of each company size segment	33	20	27	20	

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

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MOBILITY SOLUTIONS LIST AND DEFINITIONS

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

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

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

PUBLIC TRANSPORT

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

AN APP PROVIDED BY THE COMPANY TO BOOK MOBILITY SOLUTIONS

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

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

CAR OR CASH ALLOWANCE

2

EXECUTIVE SUMMARY

#1

A VERY STRONG INTEREST FOR SECOND-HAND VEHICLES

- **A large majority of Danish companies anticipate stability or increase in their fleets** in the next 3 years, although still slightly less so than the rest of Europe. Smaller companies, which were less confident about the future of their fleets in 2023, catch up with their bigger counterparts in 2024.

- This expected fleet growth is **induced by optimism on business development,** as well as, more secondarily, **HR needs** (to recruit and retain employees) and **salary exchange/sacrifice**. Concurrently, fleet decrease would be driven by **declining business** and more **working from home** practices.

- Concerning **future challenges, fleet managers are concerned by an array of topics,** such as alternative fuel technologies, restrictive fuel policies, responsible driving, low emission zones and adjusting to homeworking. **Yet, as of 2024, homeworking practices do not impact companies' mobility policies**.

- **Fleet length remains stable in 2024**, at lower levels vs Europe.

- Finally, s**econd-hand vehicles make an important part of Danish corporate fleets**: with 64% adopters and 95% considerers or users, **Denmark places at the very top of Europe's interest in second-hand vehicles**, along with Finland and Greece. Consideration/usage of second-hand vehicles is **high regardless of company size and vehicle type**, demonstrating a true engagement from Danish companies.

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#2

BUSINESSES RECOGNIZE THE FINANCIAL AND PRACTICAL ADDED VALUES OF OPERATING LEASING

- **Operating leasing remains the third financing option for fleet managers in Denmark** behind preferred financial leasing and self purchase.
- Its **potential in Denmark remains moderate.**
- However, **Danish businesses recognize its advantages,** both in accounting, as it allows **keeping capital in the business** and having **fixed expenses**, and practicality, with a **package of services**, **less risk** and **administrative work**, as well as **flexible contracts**.

INSIGHT 3: DRIVEN BY ENVIRONMENTAL CONCERNS, INTEREST IN ALTERNATIVE FUEL TECHNOLOGIES REMAINS STABLE AND IN LINE WITH EUROPE

#3

LACK OF KNOWLEDGE ABOUT ESG REPORTING COULD BE ADDRESSED

- In Denmark in 2024, **adoption and intent to use alternative fuel technologies for passenger cars** is **stable** and **in line** with the **European average,** mostly driven by environmental concerns.

- **Energy mix is also stable for both passenger cars and LCVs. Drop in interest for Plug-in Hybrids passenger cars observed in 2023 is confirmed this year,** this technology levelling with 100% BEVs on consideration, though slightly ahead in current use. Pure Hybrids are less popular than Plug-in Hybrids and 100% BEVs in Denmark, and below the European standard.

- For LCVs, use and consideration are in line with 2023 and Europe, with **100% BEVs showing potential**, especially among the largest companies. Similarly as 2023 and the rest of Europe, **Hydrogen Fuel cell LCVs do not appeal to the Danish market** yet.

- **Motivators to shift** to alternative fuel technologies are focused on the **environment** and **economical drivers**. For **passenger cars, employee requests, company image and CSR** are also taken into consideration, while for **LCVs, driving in low emission zones** is an important factor. As for constraints, **access to charging points and cost of the vehicles** are still predominant, aligned with European trends.

- **Eligibility to ESG regulatory public reporting is unknown by almost half Danish companies**, placing Denmark among the lowest rates of declared eligibility in Europe. This lack of knowledge could be addressed with information and pedagogy aimed at fleet managers. For those who declare themselves eligible to ESG reporting, **employee mobility takes an important part in the approach** (aligned with Europe).

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

#4

RIDE SHARING REMAINS A TOP MEASURE, WITH THE HIGHEST POTENTIAL

- **In 2024, mobility solutions implementation is on the rise** in Denmark and in Europe, with 8/10 companies having adopted at least one.
- **Ride sharing remains the preferred solution** in Denmark, with high usage and potential for the next three years.
- Yet, these mobility alternatives remain **perceived as add-ons** to existing fleets, rather than substitutes.

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

#5

- In terms of **implementing connected vehicles**, Denmark is in line with European trends, with 4/10 companies already equipped. Adoption is slightly higher for LCVs than passenger cars.

- However, **only 17% of Danish companies actually use telematics data in 2024,** also aligned with their European counterparts.

- Yet, there is **good potential for telematics on the Danish market,** with a **widespread intent to use** (64%).

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3

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

DENMARK COMPANIES ARE STILL CONFIDENT ABOUT THE FUTURE OF THEIR FLEETS

1. In 2024, **86% of Danish companies anticipate that their fleet size will remain stable or even increase in the next 3 years**, a trust level **slightly below other European countries** (91% on average). Following a downward trend in 2023, **smaller companies regain confidence in their passenger cars fleets in 2024**, with expected stability or increase back to the same levels as larger companies. For **LCVs fleets, the smallest companies now exceed bigger businesses' levels on expected increase or stability** (85% vs 74-78%).

2. In line with the European trend, and stable vs 2023, the **anticipated fleet increase is mostly driven by business development** (80%). The **HR strategy** (for recruiting and retaining talents) and **salary exchange/sacrifice** appear next, but far behind (43% and 40% respectively. Likewise, any **fleet decrease would be attributable to declining business**, as well as, more so than in Europe, **increasing working from home practices**.

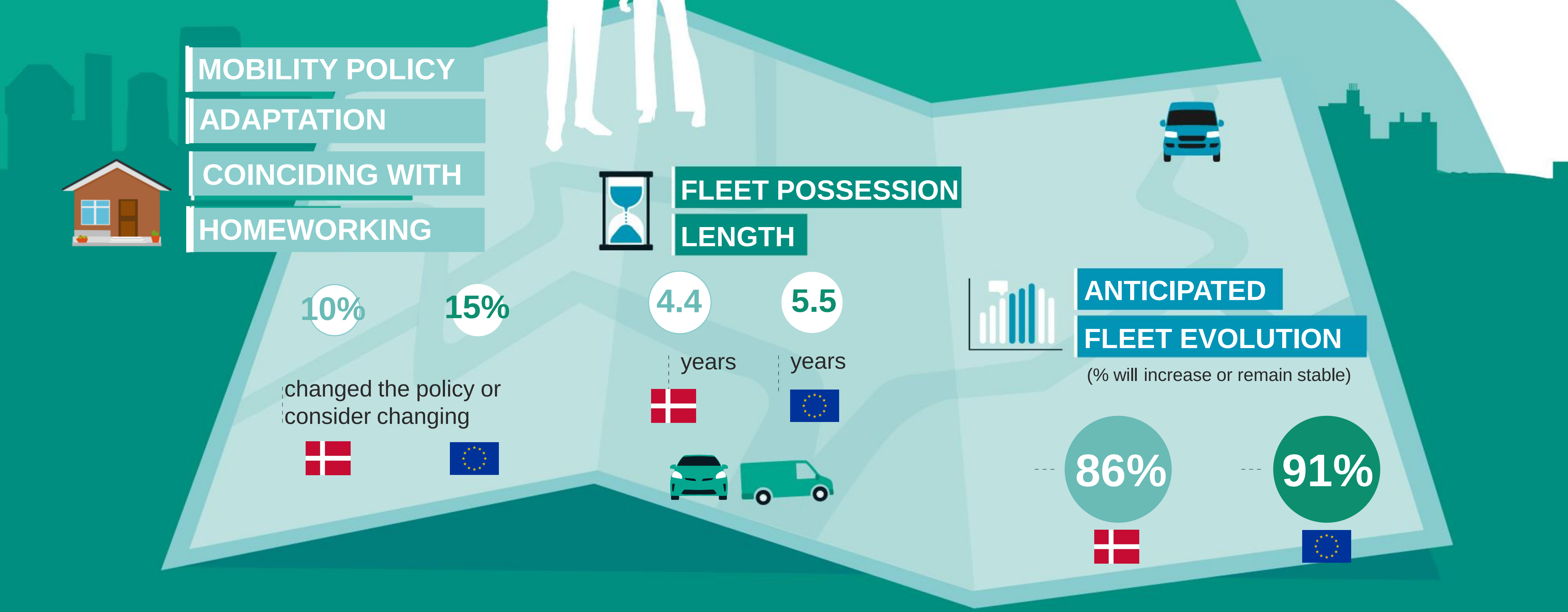
3. **Possession length** of vehicles remains **stable in Denmark**, still **shorter than the European average** (4.4 years in Denmark vs 5.5 in Europe).

4. **Working from home presents a challenge for 25% of Danish companies**, but it does not stand out from other fleet related topics, such as alternative fuel technologies, restrictive fuel policies, responsible driving, low emission zones. **Rising this year, while remaining less crucial, are managing total cost of ownership** and implementing other **mobility solutions**.

   Confirming last year's tendency, 90% of Danish companies **do not consider any adjustment of their mobility policy** to adapt to the development of **homeworking.**

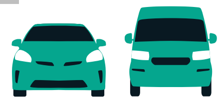
5. **Denmark is a champion of second-hand vehicles: 64% of Danish companies have already adopted them**, and **95% use or would consider including this type of vehicles in their fleet.** These results are the highest in Europe, alongside Finland and Greece. Firm believers of relying on second-hand fleets, Danish companies show **similarly high intent or use across business sizes, regardless of vehicle types**. **Second-hand passenger cars are equally destined to tool/job needs cars** (more so than in the rest of Europe) **and carpooling.**

FLEET PROFILE

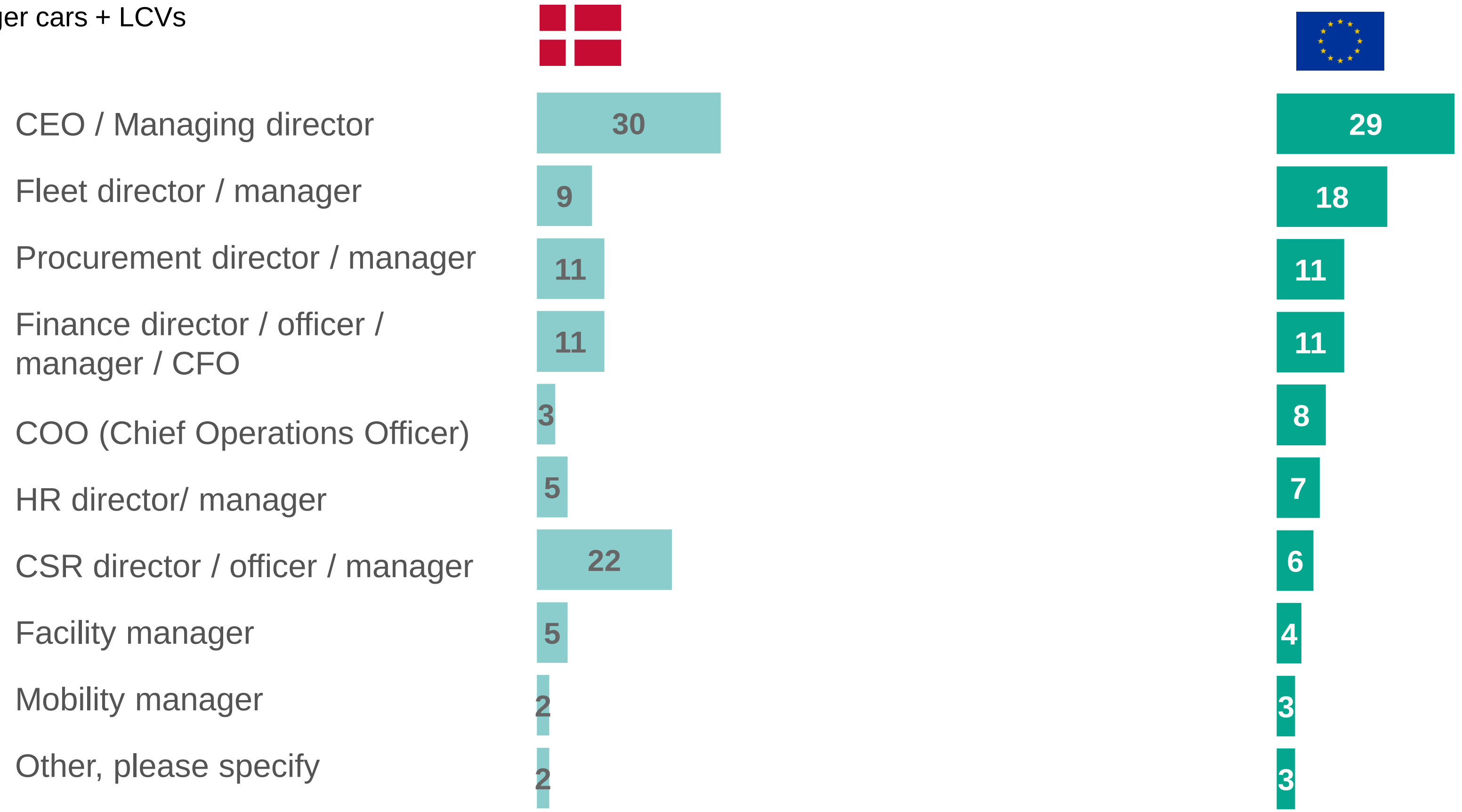


RESPONDENTS POSITION WITHIN THE COMPANY

In %



Passenger cars + LCVs



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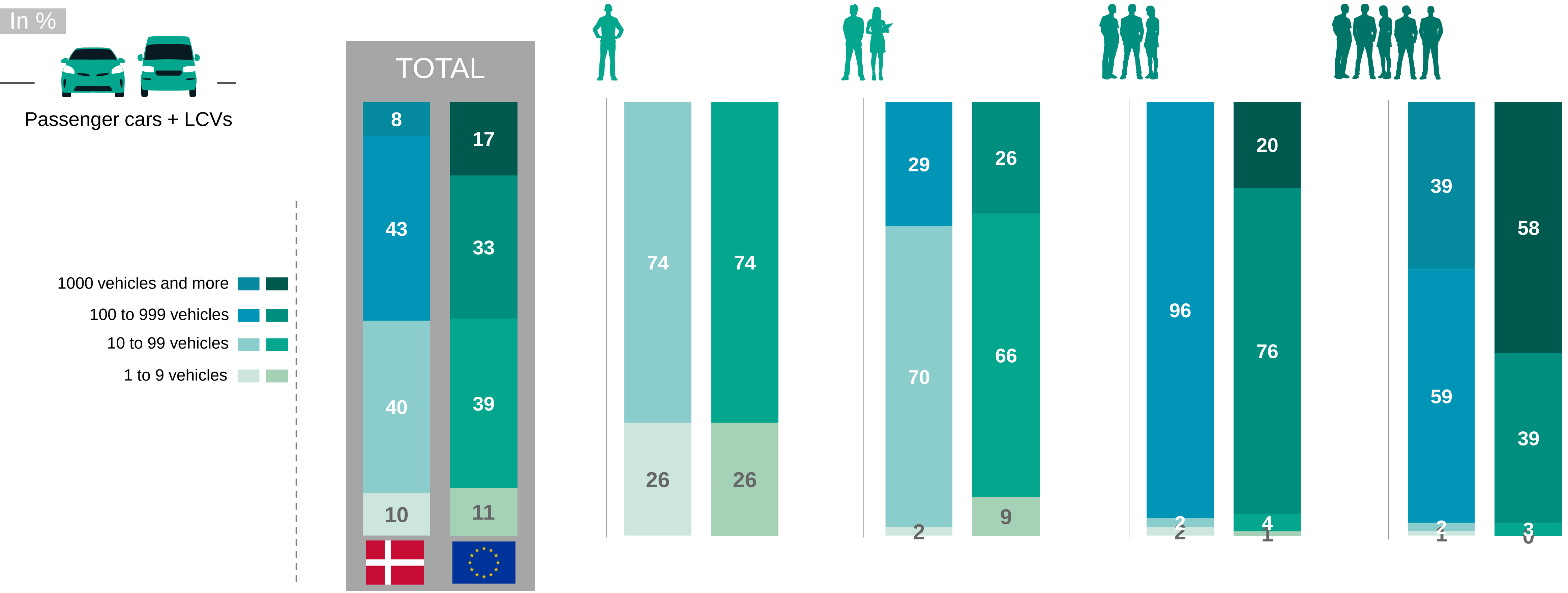
Could you please specify your exact position in the company?
Basis: companies with corporate vehicles = 100%

NUMBER OF VEHICLES IN FLEET



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

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

(among companies with at least one vehicle in fleet)

In %

		TOTAL				
PASSENGER CARS		97	96	97	100	96
		99	97	98	100	100
VANS OR LCVs		99	100	99	98	99
		98	99	97	99	99

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

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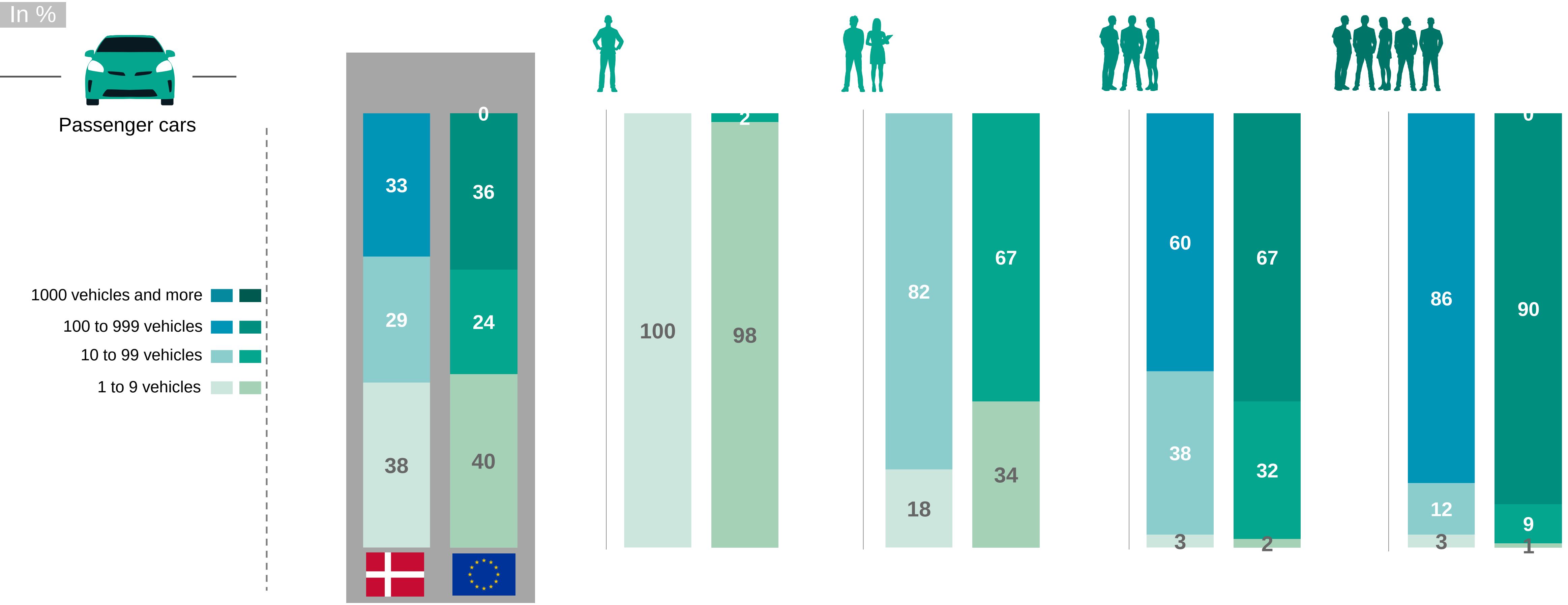
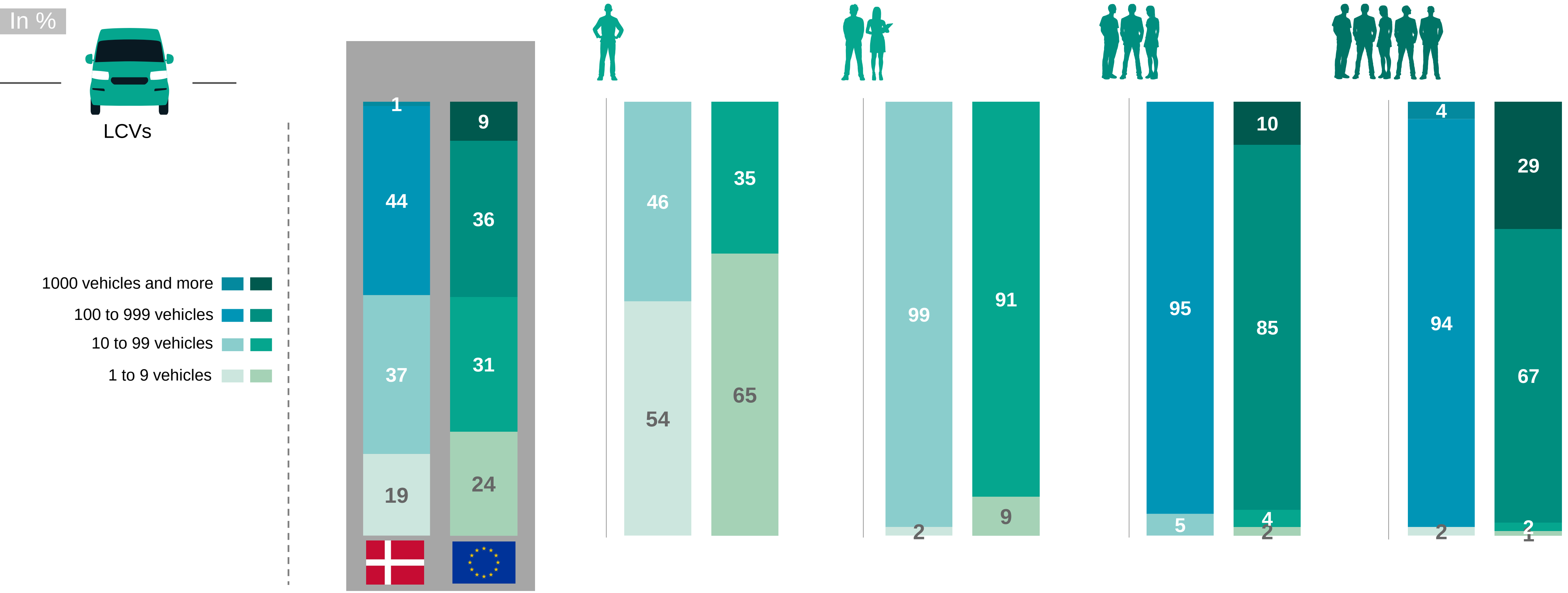
NUMBER OF PASSENGER CARS IN FLEET

In %



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

NUMBER OF LCVS IN FLEET



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

VEHICLES POSSESSION LENGTH

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

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PASSENGER CARS POSSESSION LENGTH

Passenger cars

AVERAGE IN YEARS

	TOTAL				
	4.3	4.4	4.5	4.4	4
	5.3 5.7	5.2 5.6	5.4 5.7	5.3 5.6	5.4

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				
	4.5	4.5	4.7	4.7	4.3
	5.7	5.6 5.8	5.8	5.7	5.8

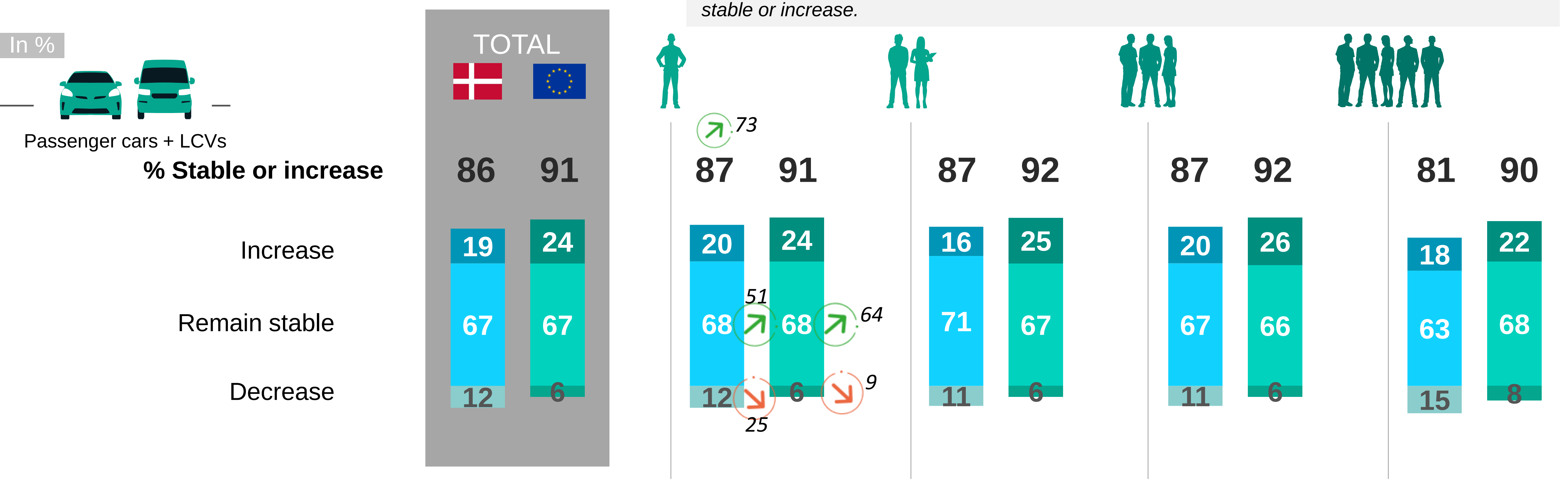
And how long do you keep your LCV, light commercial vehicles or vans (before being sold or returned to the leasing company)?
Basis: companies with LCVS

FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

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

In %



BALANCE in pts (INCREASE ⊝ DECREASE)

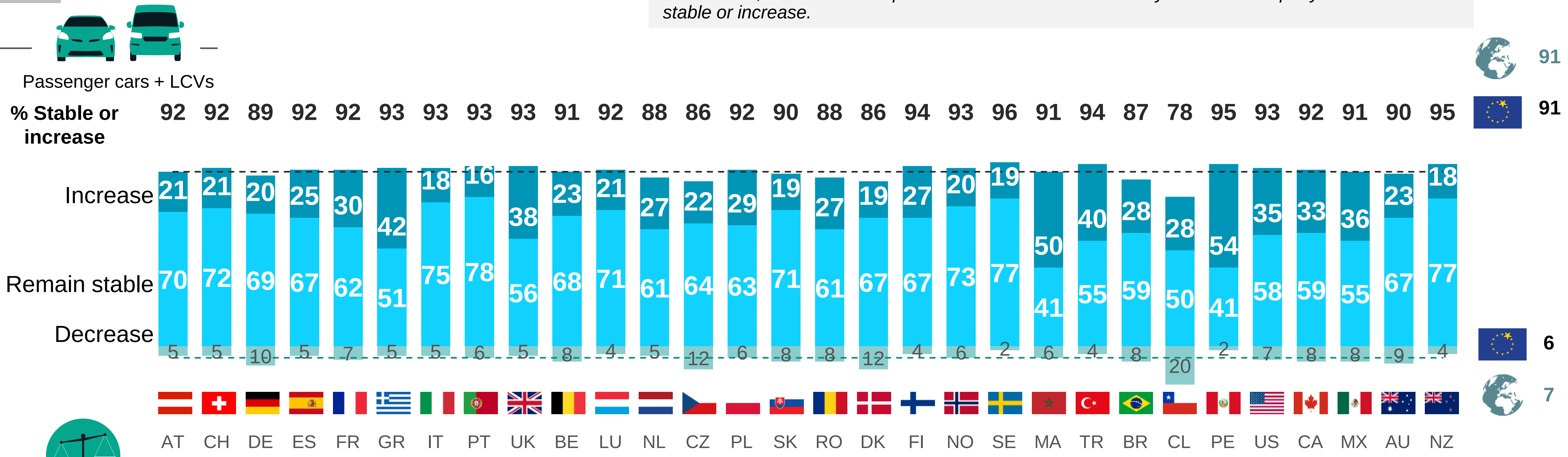
2024	+7	+18	+8	+17	+5	+19	+9	+20	+4	+15
2023	+8	+16	-3	+15	+12	+16	+19	+17	+9	+16
2022	+10	+18	+12	+19	+16	+17	+2	+17	+9	+17

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

FLEET GROWTH POTENTIAL

In %

> *HOW TO READ THE RESULTS ?*
>
> *In Denmark, 86% of the companies declare that in the next 3 years their company fleet will remain stable or increase.*



	AT	CH	DE	ES	FR	GR	IT	PT	UK	BE	LU	NL	CZ	PL	SK	RO	DK	FI	NO	SE	MA	TR	BR	CL	PE	US	CA	MX	AU	NZ	World	EU
2024	+17	+15	+10	+20	+22	+37	+13	+10	+33	+15	+17	+22	+10	+23	+11	+20	+7	+24	+14	+16	+44	+36	+21	+9	+52	+28	+25	+28	+15	+13	+21	+18
2023	+17	+11	+13	+14	+21	+34	+19	+9	+24	+14	+15	+15	+9	+24	+7	+22	+8	+22	+12	+12	+46	+34	+21	+26	+44	+23	+24	+30	+11	+16	+20	+16
2022	+18	+13	+18	+16	+24	+24	+18	+22	+27	+13	+19	+23	+7	+22	+13	+23	+10	+21	+11	+14	+33	+14	+19	+24	+49	-	-	-	-	-	+20	+18

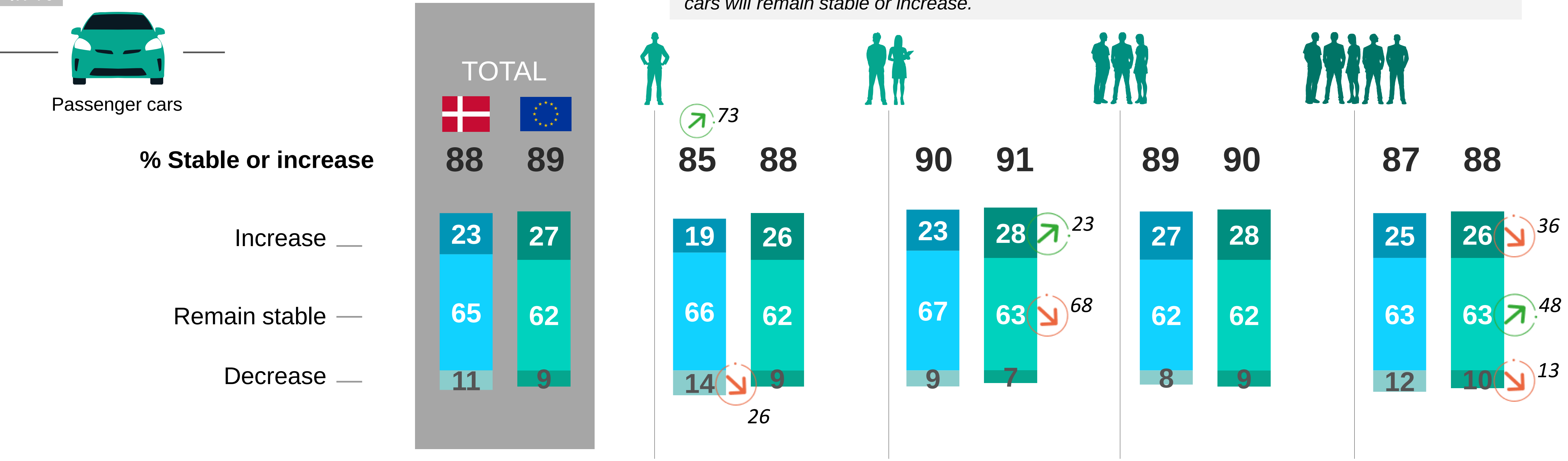
In the next three years, do you think that the total number of vehicles in your company fleet will increase, decrease or remain the same?
Basis: companies with corporate vehicles = 100%

PASSENGER CAR FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Denmark, 88% of the companies declare that in the next 3 years the total number of passenger cars will remain stable or increase.

In %



BALANCE in pts (INCREASE ⊖ DECREASE)

2024	+13	+18	+6	+17	+14	+21	+19	+19	+13	+16
2023	+8	+17	-7	+16	+11	+15	+19	+17	+8	+22

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

Basis: companies with passenger cars

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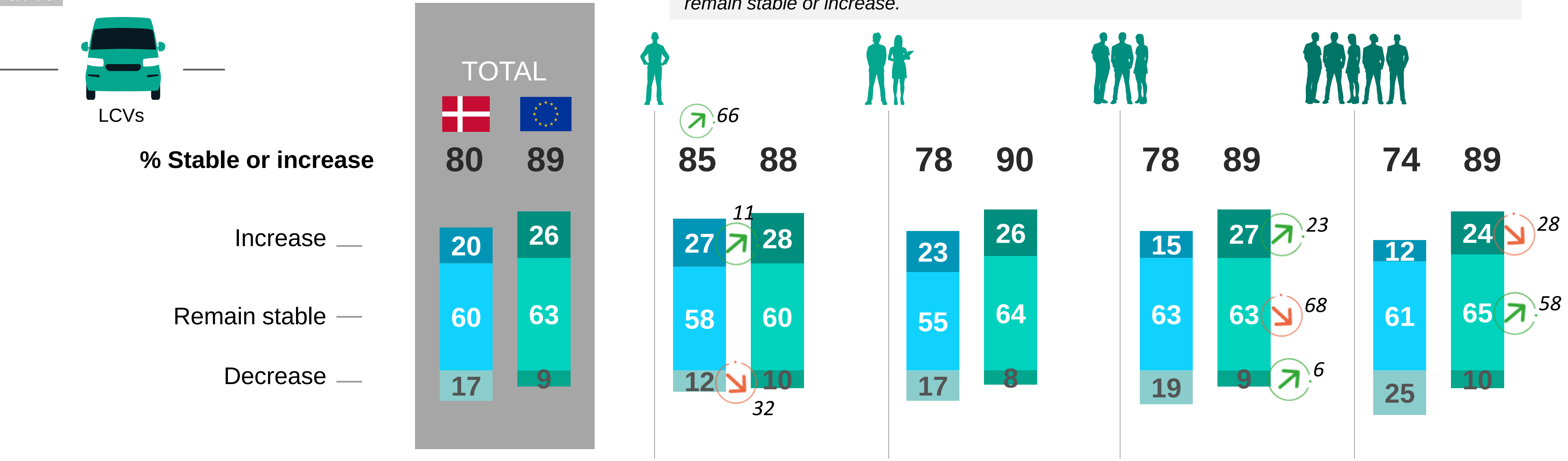
LCVS FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Denmark, 80% of the companies declare that in the next 3 years the total number of LCVs will remain stable or increase.

In %



BALANCE in pts (INCREASE ⊖ DECREASE)										
2024	+3	+17	+15	+18	+6	+18	-4	+18	-12	+14
2023	+3	+17	-20	+19	+11	+15	+18	+17	-1	+17

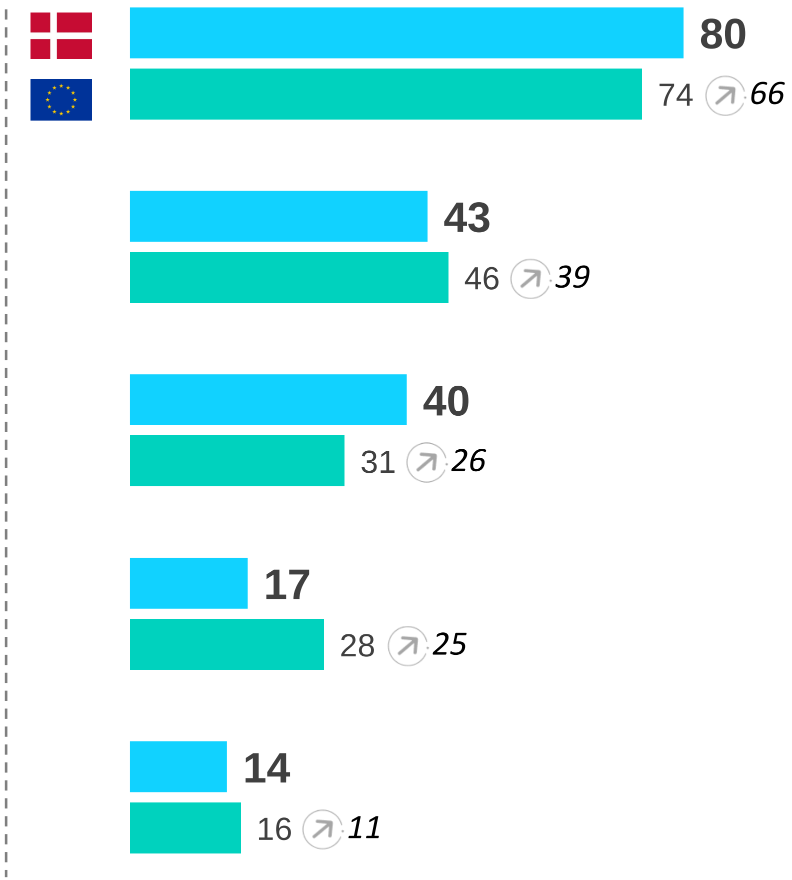
In the next three years, do you think that the total number of your light commercial vehicles or vans will…

Basis: companies with LCVS

REASON FOR FUTURE FLEET INCREASE

In %

Passenger cars + LCVs



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

XX Significantly higher than 2023 year
XX = score 2023

XX Significantly lower than 2023 year
XX = score 2023

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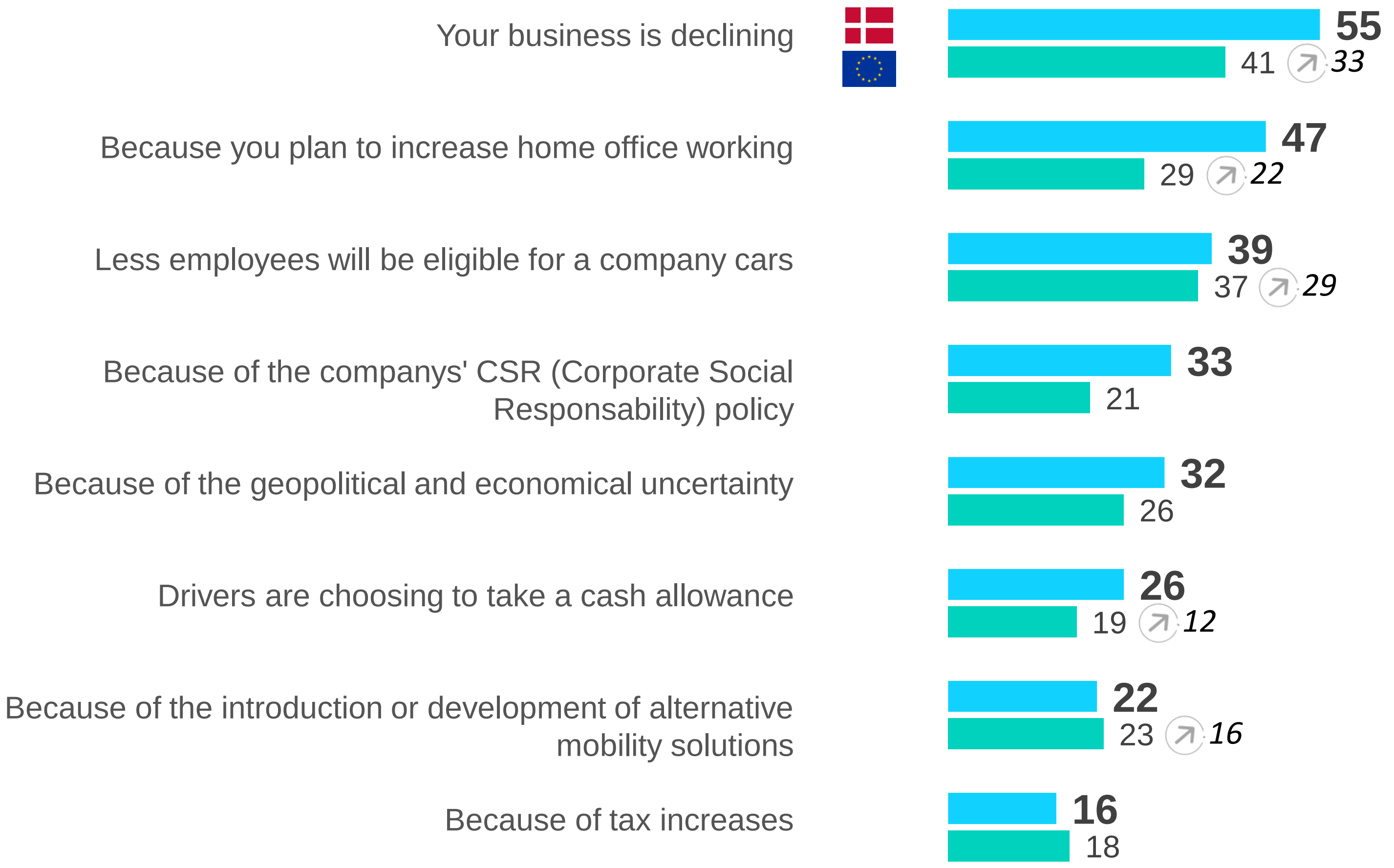
REASON FOR FUTURE FLEET DECREASE

In %

Passenger cars + LCVs



XX | Significantly higher than 2023 year
XX = score 2023

XX | Significantly lower than 2023 year
XX = score 2023

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

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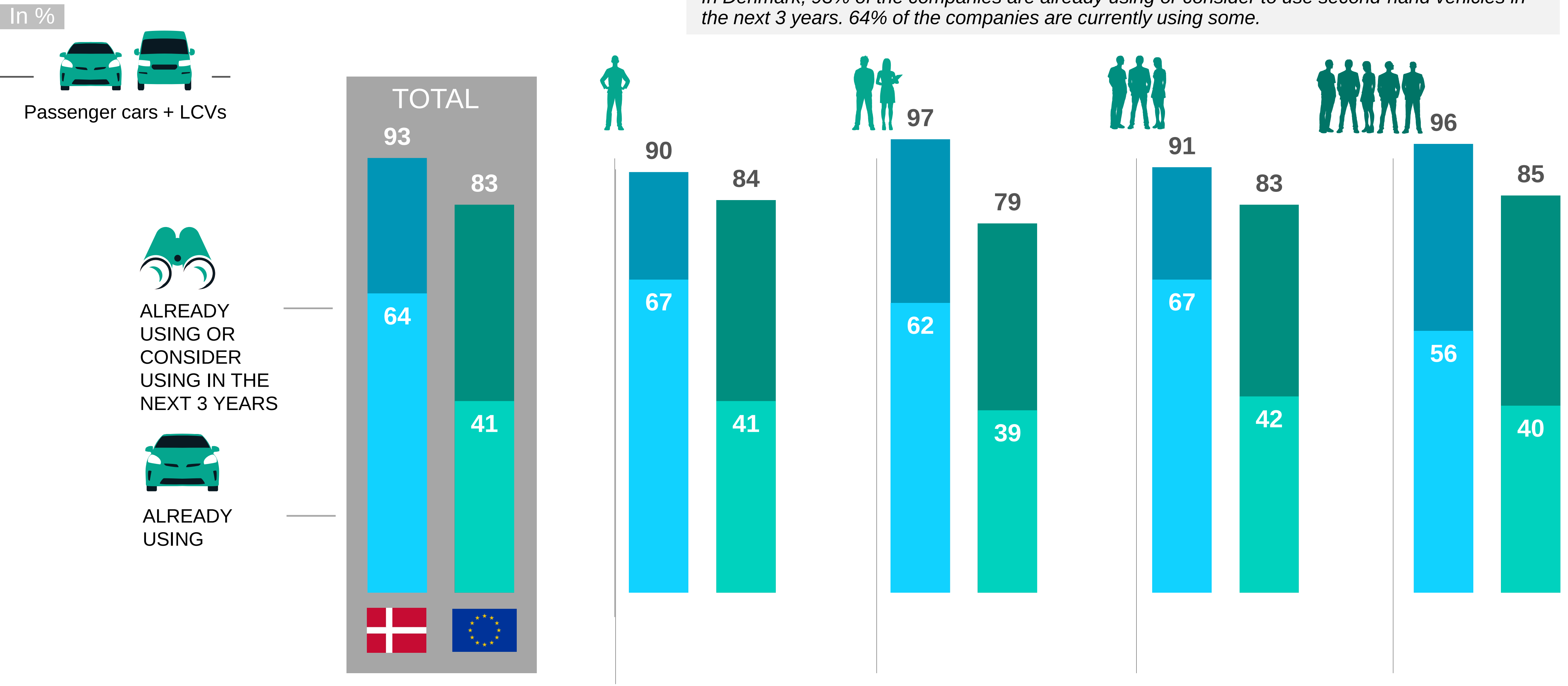
SECOND-HAND VEHICLES

HOW TO READ THE RESULTS ?

In Denmark, 93% of the companies are already using or consider to use second-hand vehicles in the next 3 years. 64% of the companies are currently using some.



New question added in 2024

Do you have used/second-hand vehicles in your fleet or do you consider having some in the next three years?

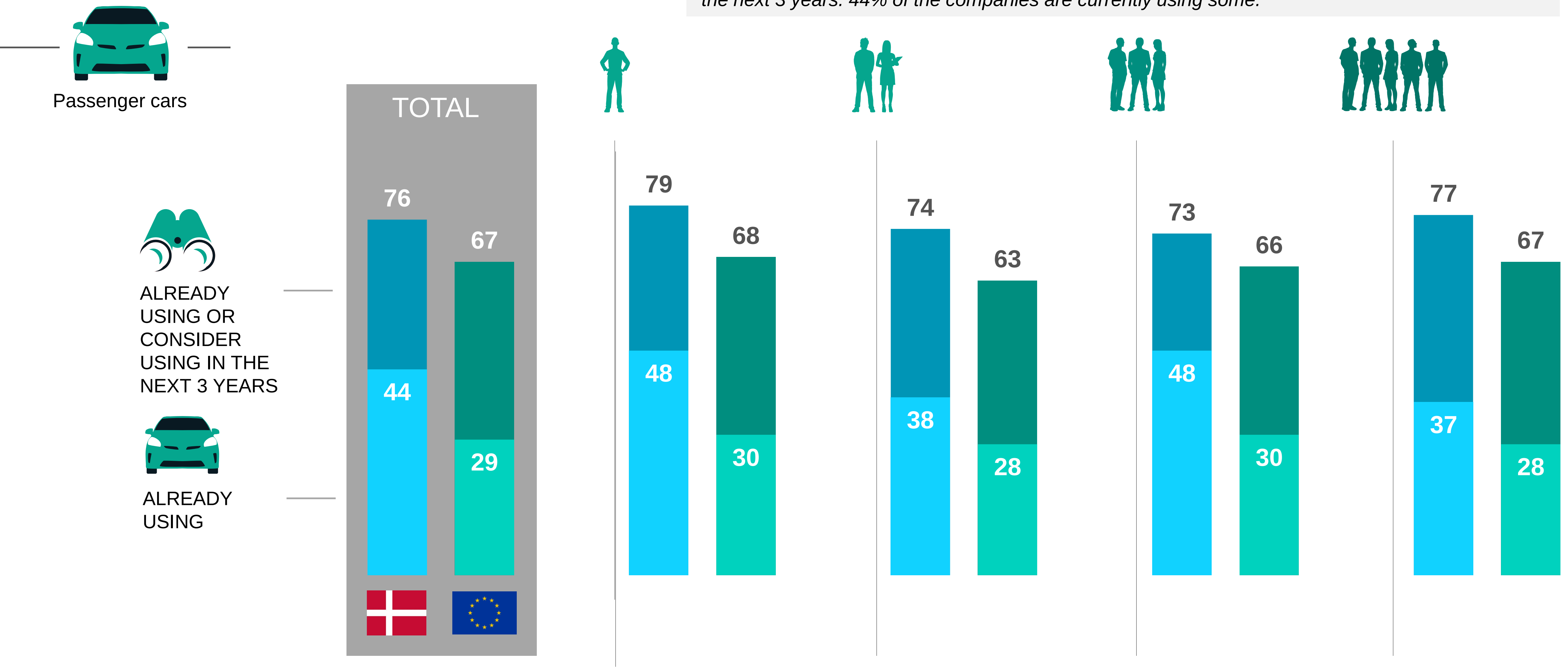
Basis: companies with corporate vehicles = 100%

SECOND-HAND VEHICLES FOR PASSENGER CAR FLEET

HOW TO READ THE RESULTS ?

In Denmark, 76% of the companies are already using or consider to use second-hand vehicles in the next 3 years. 44% of the companies are currently using some.

In %



New question added in 2024

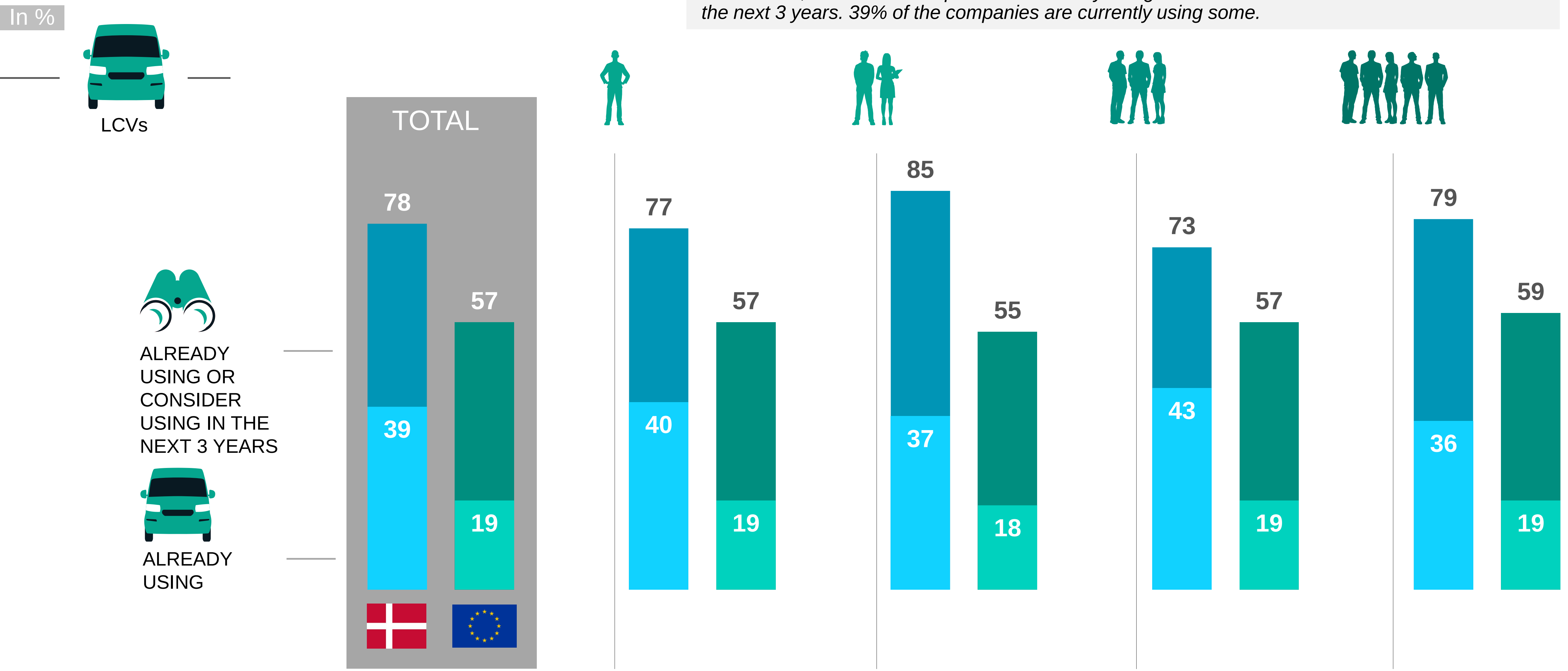
Do you have used/second-hand vehicles in your fleet or do you consider having some in the next three years?

Basis: companies with passenger cars

SECOND-HAND VEHICLES FOR LCVS CAR FLEET

HOW TO READ THE RESULTS ?

In Denmark, 78% of the companies are already using or consider to use second-hand vehicles in the next 3 years. 39% of the companies are currently using some.



New question added in 2024

Do you have used/second-hand vehicles in your fleet or do you consider having some in the next three years?

Basis: companies with LCVS

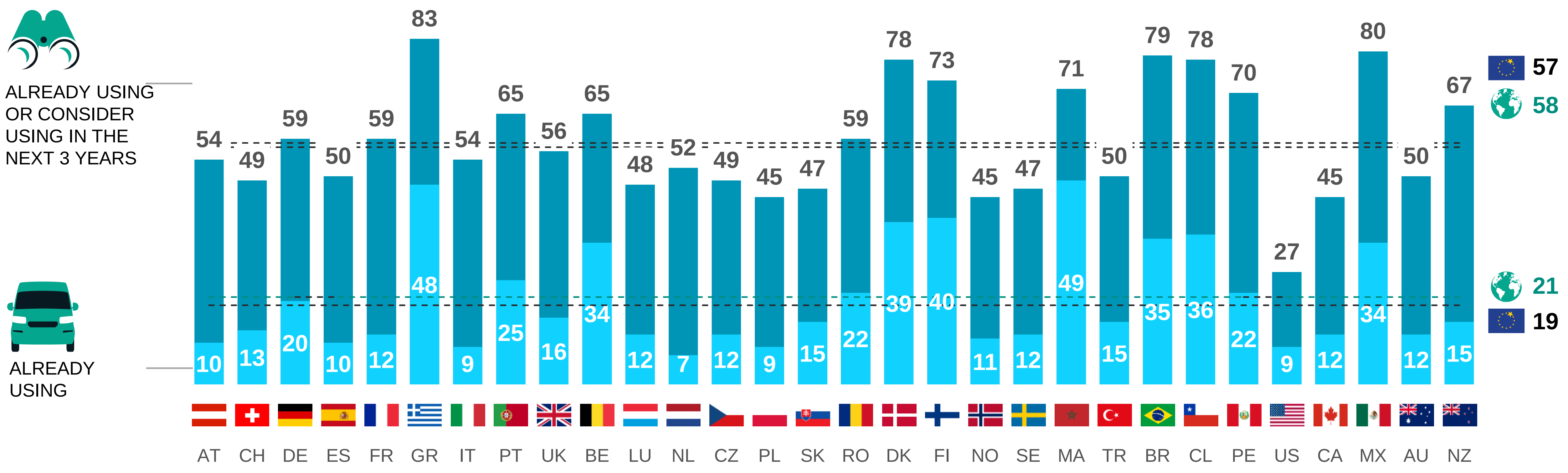
SECOND-HAND VEHICLES FOR LCVS CAR FLEET

HOW TO READ THE RESULTS ?

In Denmark, 78% of the companies are already using or consider to use second-hand vehicles in the next 3 years. 39% of the companies are currently using some.

In %

LCVs



New question added in 2024

Do you have used/second-hand vehicles in your fleet or do you consider having some in the next three years?

Basis: companies with LCVS

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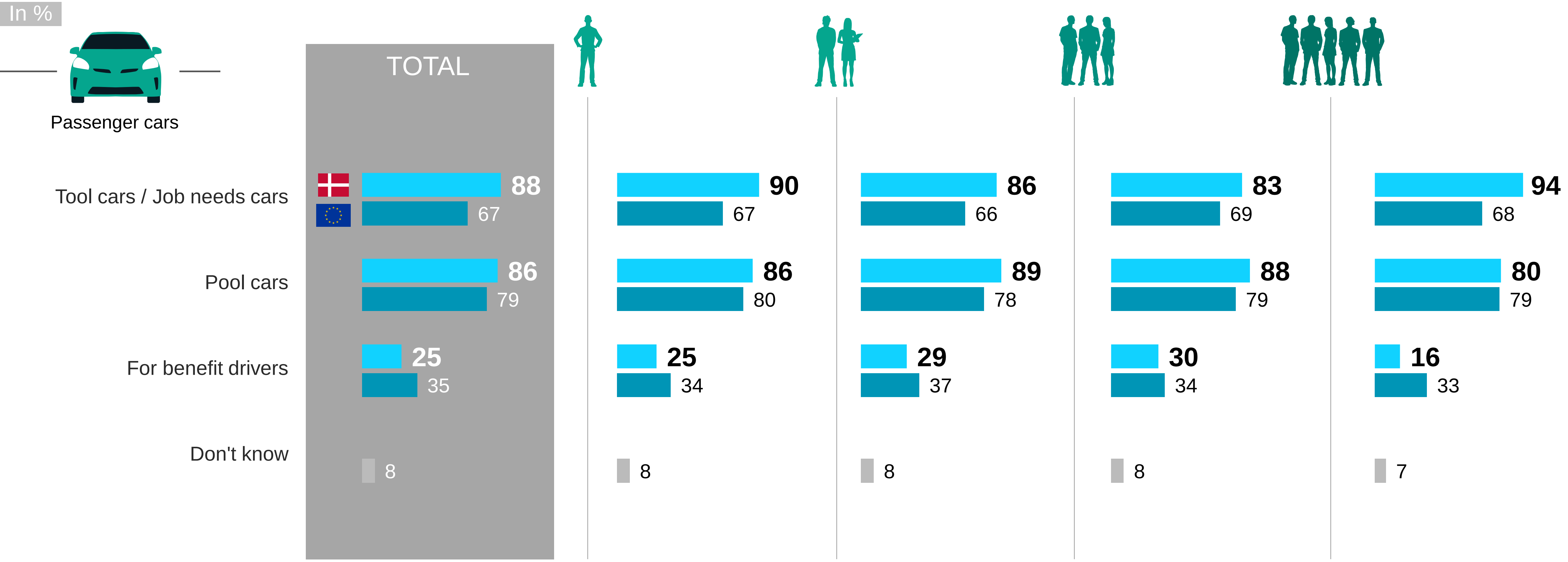
TYPE OF USE OF USED / SECOND-HAND PASSENGER CARS



New question added in 2024

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

Basis: companies with second-hand passenger cars

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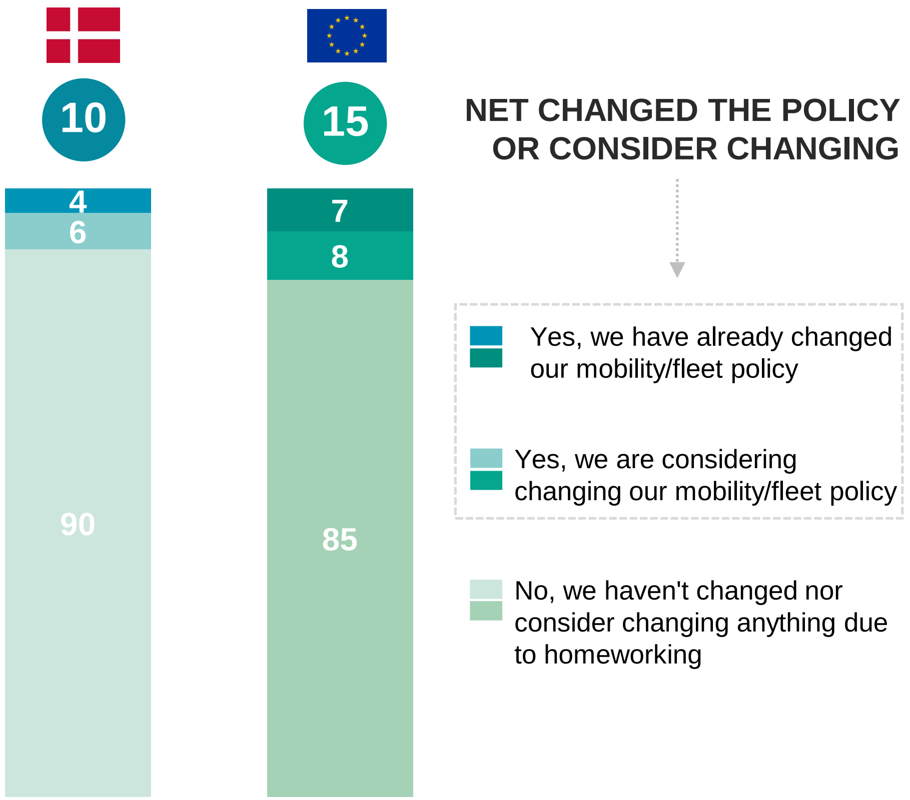
MOBILITY POLICY ADAPTATION COINCIDING WITH HOMEWORKING

HOW TO READ THE RESULTS ?

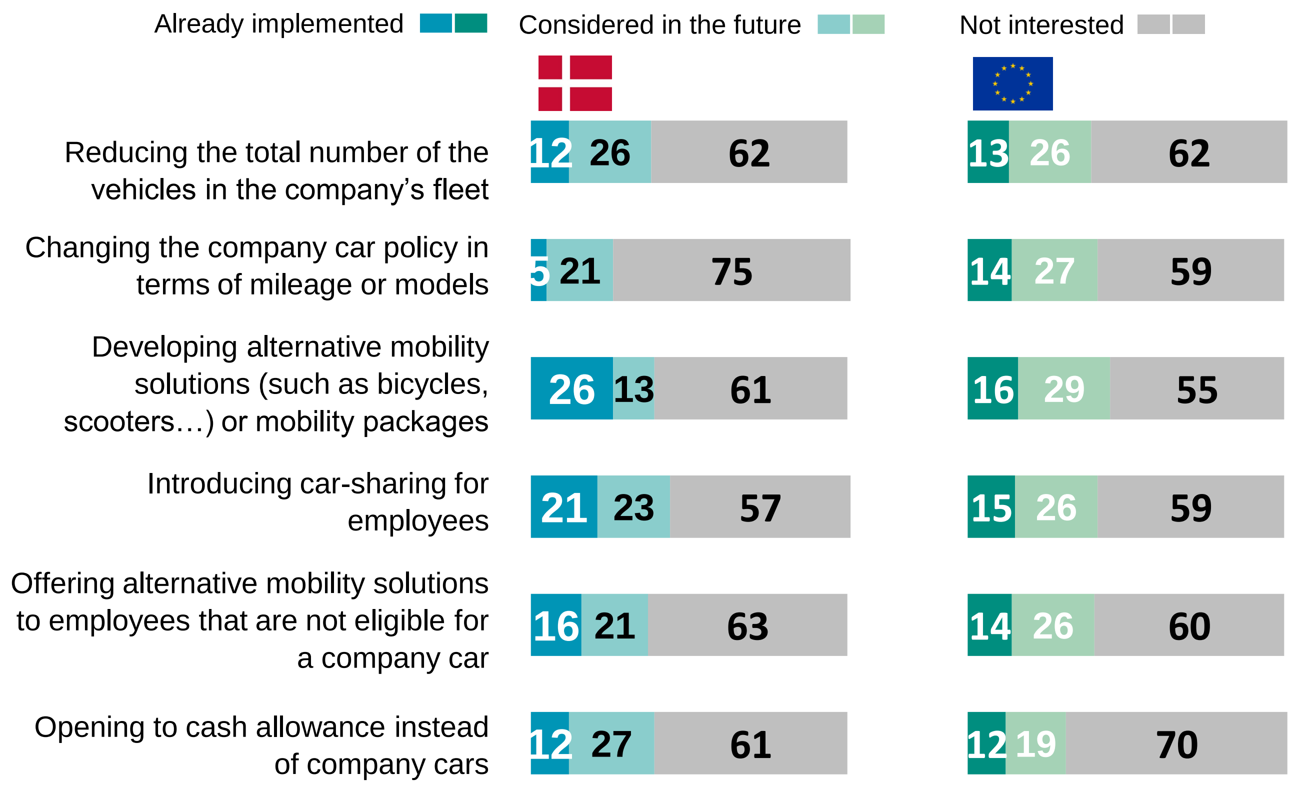
In Denmark, among the companies that changed or consider changing their mobility policy, 12% have already reduced the total number of the vehicles in the company's fleet.

In %

Passenger cars + LCVs



Basis: companies with corporate vehicles = 100%



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

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

Question asked to respondents that are aware of mobility solutions

MOST IMPORTANT CHALLENGES EXPECTED

In %

Passenger cars + LCVs

Nb 1 challenge

Top 3 challenges

Challenge	Denmark: Nb 1 challenge	Denmark: Top 3 challenges	Denmark: trend	EU: Nb 1 challenge	EU: Top 3 challenges	EU: trend
Implementing alternative fuel technologies (100% electric vehicles, hybrids, rechargeable hybrids)	14%	29%		15%	34%	↗ 27
Adapting to restrictive public policies on petrol and diesel vehicles	15%	28%		14%	32%	↗ 26
Inducing more responsible driving among employees	11%	28%		12%	27%	↗ 20
Managing longer vehicles' delivery time	13%	25%		11%	27%	↗ 22
Mitigating the increase of total cost of ownership of the vehicles	9%	22%	↗ 13	11%	27%	↗ 20
Adapting to the expansion of low emission zones in urban areas	10%	26%		11%	25%	↗ 21
Adjusting to new ways of working (hybrid between home and office)	12%	25%		10%	23%	↗ 18
Adapting to evolutions of car selling models (ex. directly from manufacturer without buying through car dealer)	8%	16%		9%	22%	↗ 18
Implementing other mobility solutions (ex. car sharing, bikes…)	9%	21%	↗ 14	8%	20%	↗ 15

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

Basis: companies with corporate vehicles = 100%

4

HOW ARE COMPANIES FINANCING THEIR FLEET?

A MODERATE POTENTIAL FOR OPERATING LEASING IN DENMARK, STILL BEHIND FINANCIAL LEASING AND OUTRIGHT PURCHASE

1

In 2024, **Danish companies continue preferring financial leasing** to subsidize their fleets, well ahead (41%) **Self purchase is the second method** (32%), **operating leasing remains behind** (19%), **but progresses for LCVs** (23% vs 16% in 2023). The **smallest companies** in particular turn to operating leasing for LCVs more in 2024 than last year (28% vs 13%).

2

Operating leasing continues to show timid potential in Denmark, with 25% of companies interested in introducing or increasing its share within the next 3 years in their financing plans, vs 35% across Europe.

3

Perceived advantages of operating leasing are both financial – releasing capital into the business, having a fixed monthly rental – **and practical** – a full package of services, less vehicle administration and risk, flexible contracts.

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FINANCING

OUTRIGHT PURCHASE

32%

OPERATING LEASING

19%

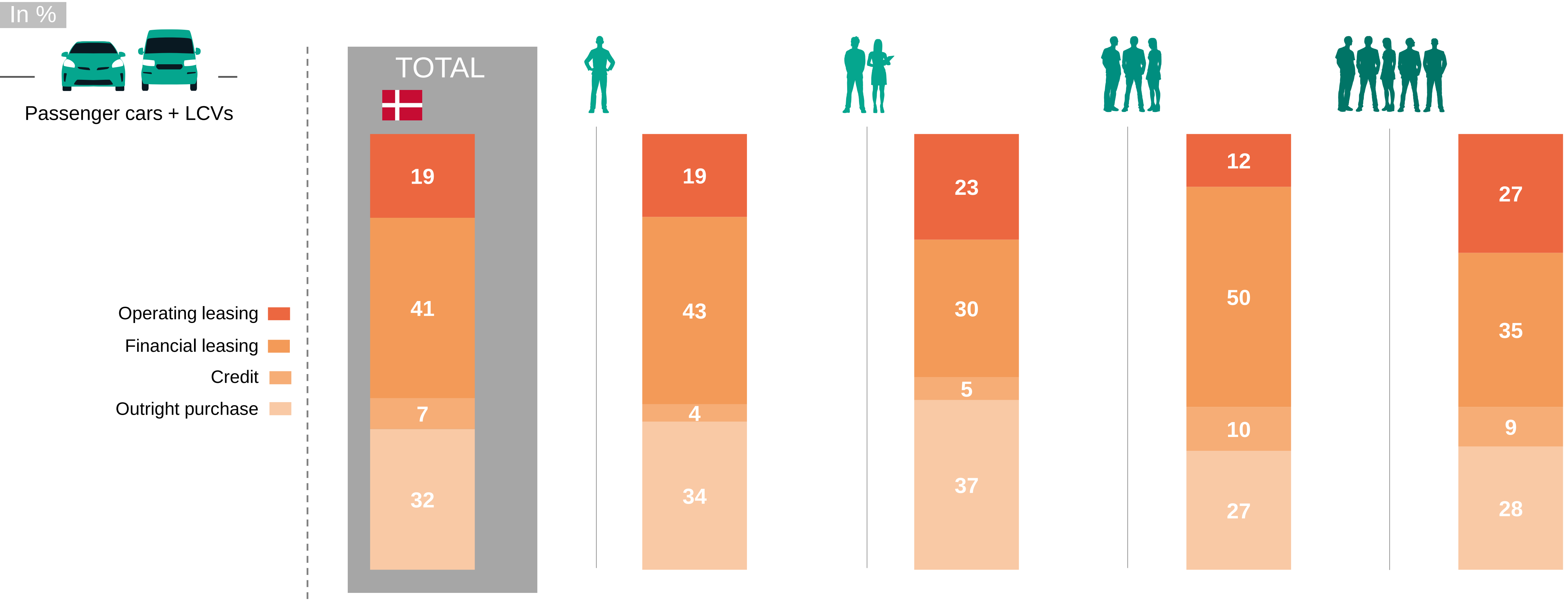
CREDIT

7%

FINANCIAL LEASING

41%

MAIN FLEET FINANCING METHOD



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

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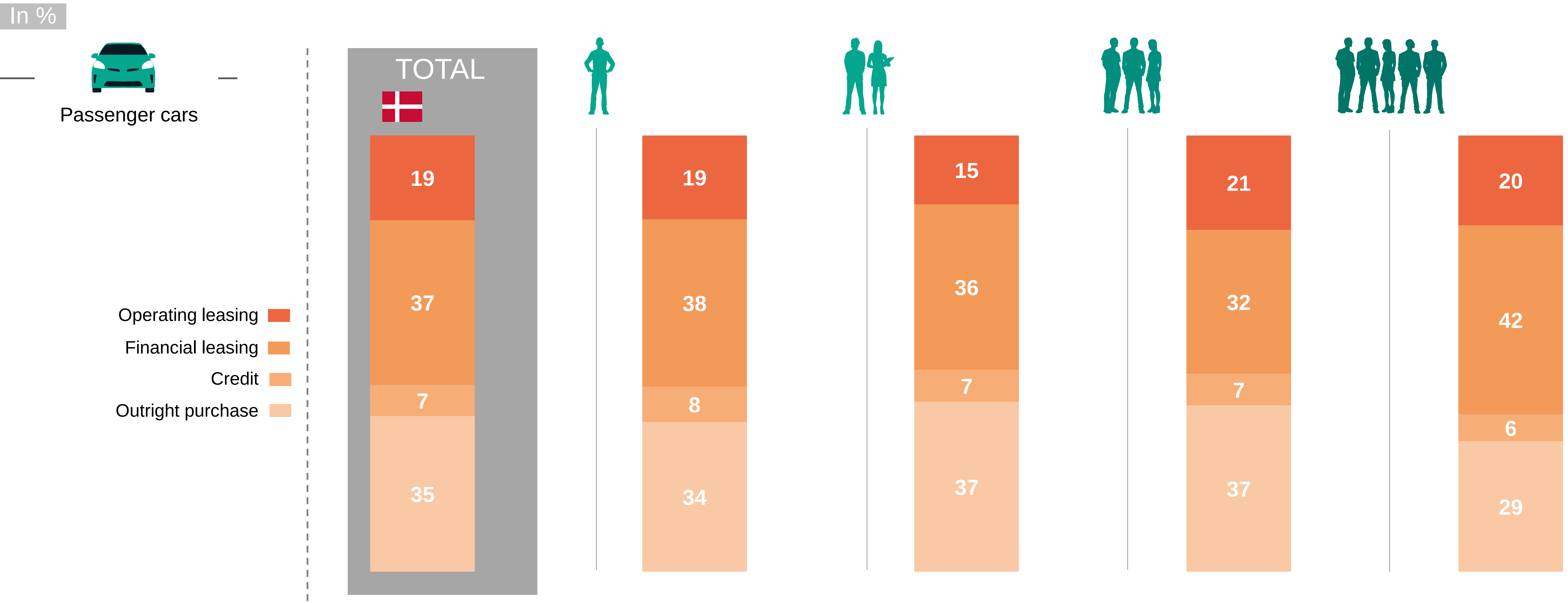
MAIN PASSENGER CARS FINANCING METHOD



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

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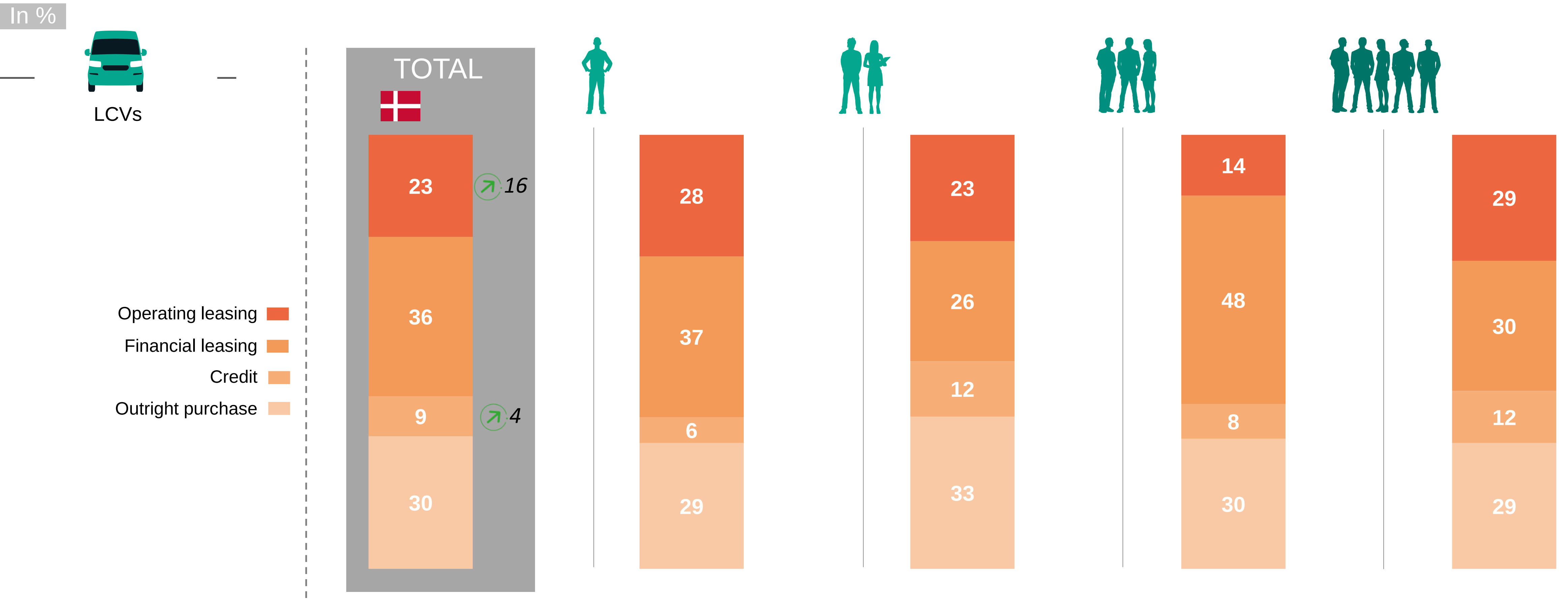
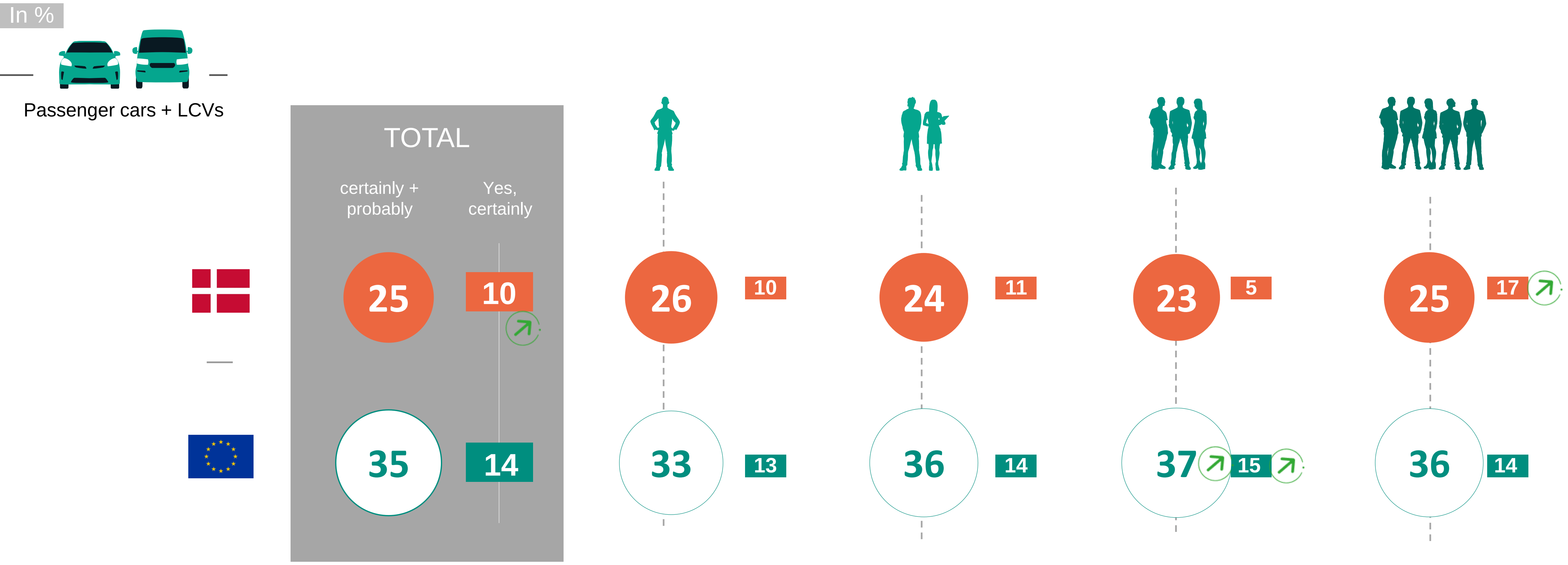
MAIN LCV FINANCING METHOD



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

INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATING LEASING

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



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

INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATING LEASING

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

In %

Passenger cars + LCVs

		TOTAL: Total certainly + probably	TOTAL: Yes, certainly								
Denmark	2024	25	10	26	10	24	11	23	5	25	17
Denmark	2023	21	6	23	8	20	7	17	4	26	2
EU	2024	35	14	33	13	36	14	37	15	36	14
EU	2023	34	13	35	13	32	12	33	12	34	13

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%

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MAIN ADDED VALUES OF OPERATING LEASING

In %

Passenger cars + LCVs

	TOTAL				
Release capital into the business	25	22	31	26	24
Fixed monthly rental	24	28	35	16	18
All services included / a full package: All is included in the rental agreement	23	17	16	31	28
Reduce vehicle administration	22	24	21	21	20
A flexible contract	21	21	18	22	25
No risk regarding residual value, service, repairs and tires	18	17	10	21	26
Don't know	5	7	3	5	3
None of these values	9	11	8	7	7
Other	2	1	4	1	2
Average number of quotations	1.6	1.6	1.5	1.6	1.6

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

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5

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

STILL A GOOD ADOPTION OF ALTERNATIVE FUEL TECHNOLOGIES IN DENMARK, IN LINE WITH THE EUROPEAN BENCHMARK

1

The transition towards wider use of alternative fuel technologies in Denmark remains stable, and level with the European average, with 53% companies currently using at least one of these alternative technologies for passenger cars (vs 59% in Europe on average). Including **those that consider using such technologies in the next 3 years** adds up to 73% Danish companies, **in line with 2023 and the European standard** of 77%. This applies across **all company sizes**.

2

The energy mix for passenger cars is stable, confirming a **two-year decrease for Plug-in Hybrids**. As such, **Plug-in Hybrids and 100% BEVs yield the same level of interest** (41-42%, level with Europe, with adoption still slightly higher for Plug-in Hybrids than 100% BEVs) while **Hybrids remain behind** (29%, below the 42% European benchmark). In detail, **medium-small businesses** (10-99 employees) **still favour Plug-In Hybrids** over other alternative fuel technologies, while the **largest companies** (250+ employees) much **prefer 100% BEVs**. **Denmark remains below European standards** on Hybrid technology. **Anticipated fleet in the next 3 years remains mostly petrol- or diesel-based** (57%), level with Europe (58%).

3

Concerning LCVs, current **adoption** (8%) and **use or consideration** (35%) of these alternative technologies in Denmark are **level with the European benchmark** (12% and 34% respectively). **100% BEVs garner 26% use or consideration** (among which 6% use), again aligned with the European average (27%). While the **largest businesses** (250+ employees) **are still more interested in 100% BEV than the rest** (36% vs 21-27% for smaller companies), **medium-large companies** (100-249 employees) **see their interest in this technology plummet this year** (21% in 2024 vs 43% last year, back to 2022 levels of 16%). **Hydrogen Fuel cell adoption and consideration are still negligible** (2% and 12% respectively), in line with the rest of Europe. Despite showing interest in 100% BEVs, **almost all companies continue expecting their LCVs fleet in the next 3 years to be petrol- or diesel-fuelled** (90%), consistent vs 2023 and still much higher than the European average (71%).

4

In a country traditionally highly involved in ecology, **reasons to shift towards these alternative technologies remain focused on lowering environmental impact,** as well as, for passenger cars specifically, **answering employee requests** (sill higher than the rest of Europe). Economical motives follow: reducing **fuel expenses,** total **cost of ownership**, as well as **company image,** and, for LCVs, being able to drive in **low emission zones. Access to charging points** and **cost of the vehicles** remain the **main barriers** to incorporating 100% BEVs in company fleets.

5

Lastly, **only 47% companies consider themselves already eligible to ESG regulatory public reporting**, or will be within 2 years, among the lowest scores in Europe (60% on average). This is probably **due to lack of knowledge**, as **44% of Danish fleet managers do not know if they are eligible**, vs 27% in Europe overall, similarly to other countries where ESG reporting eligibility appears low. **Employees mobility** in the ESG reporting approach **is considered of medium or high importance** by 92% of Danish companies, this time in line with the European standard (91%).

ENERGY MIX

AT LEAST ONE ALTERNATIVE IMPLEMENTED OR CONSIDERED*

for Passenger cars

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

73%

77%

AT LEAST ONE ALTERNATIVE IMPLEMENTED

for Passenger cars

53%

59%

EXPECTED PART OF 100% ELECTRIC PASSENGER CAR IN 3 YEARS

13%

20%

EXPECTED PART OF 100% ELECTRIC LCV IN 3 YEARS

1%

13%

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

CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

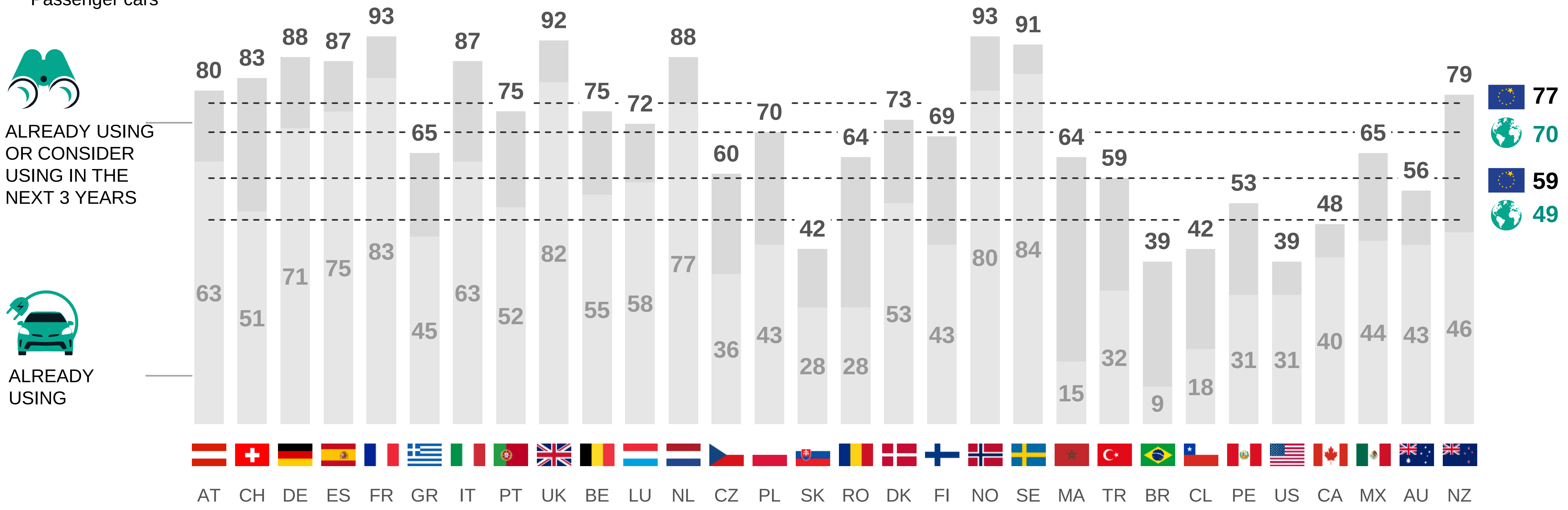
(At least one technology among HEV, PHEV and 100% BEV)

In %

Passenger cars

HOW TO READ THE RESULTS ?

In Denmark, 73% of the companies are already using or consider to implement at least one alternative technology in the next 3 years. 53% of the companies is currently using at least one.



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

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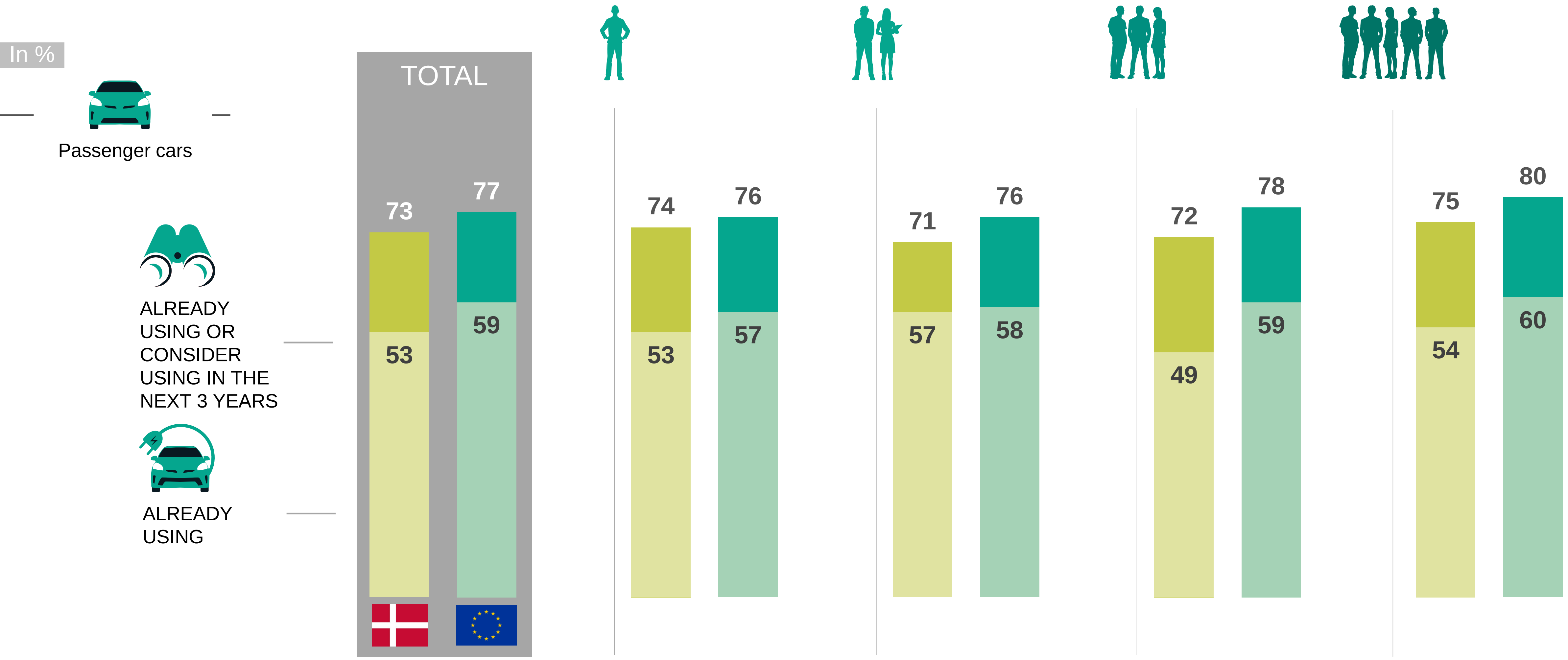
CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

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

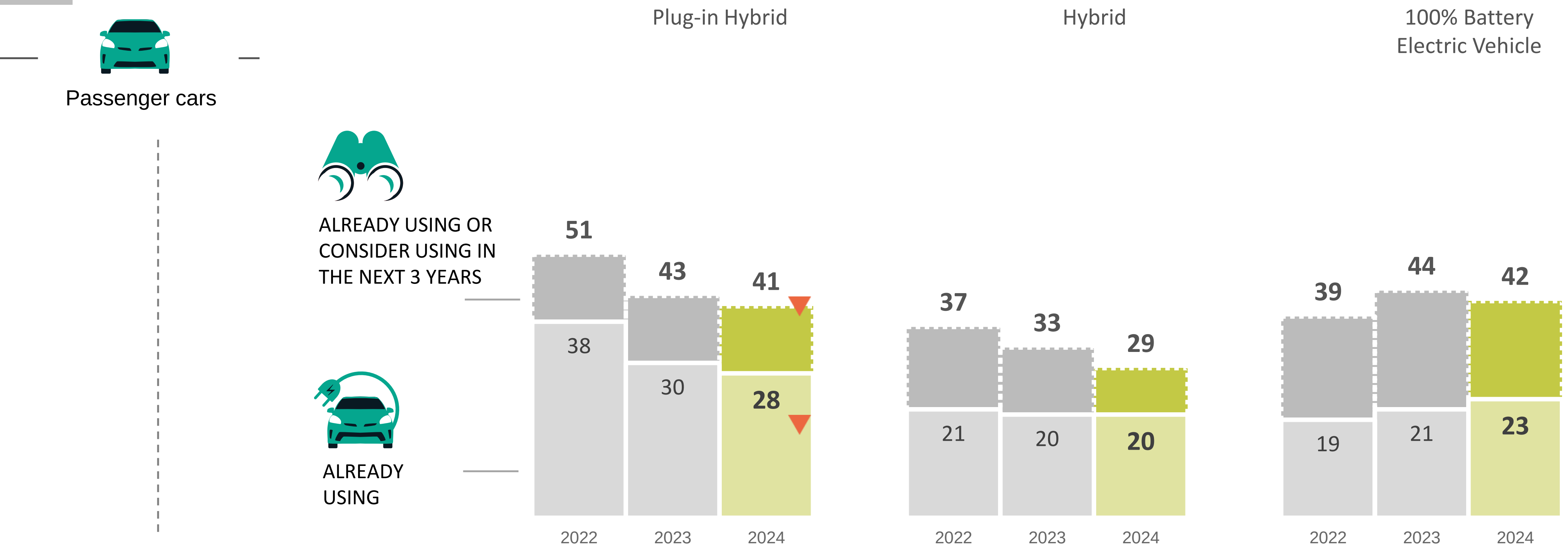


Amongst the following alternative fuel technologies, which ones do you currently use…?
Amongst the following alternative fuel technologies, which ones are you considering using…?
Basis: companies with passenger cars

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years

In %



	Plug-in Hybrid 2022	Plug-in Hybrid 2023	Plug-in Hybrid 2024	Hybrid 2022	Hybrid 2023	Hybrid 2024	100% BEV 2022	100% BEV 2023	100% BEV 2024
EU – Already using or consider using in the next 3 years	37	44	43	38	44	42	34	40	42
EU – Already using	24	29	29	26	29	28	19	24	25

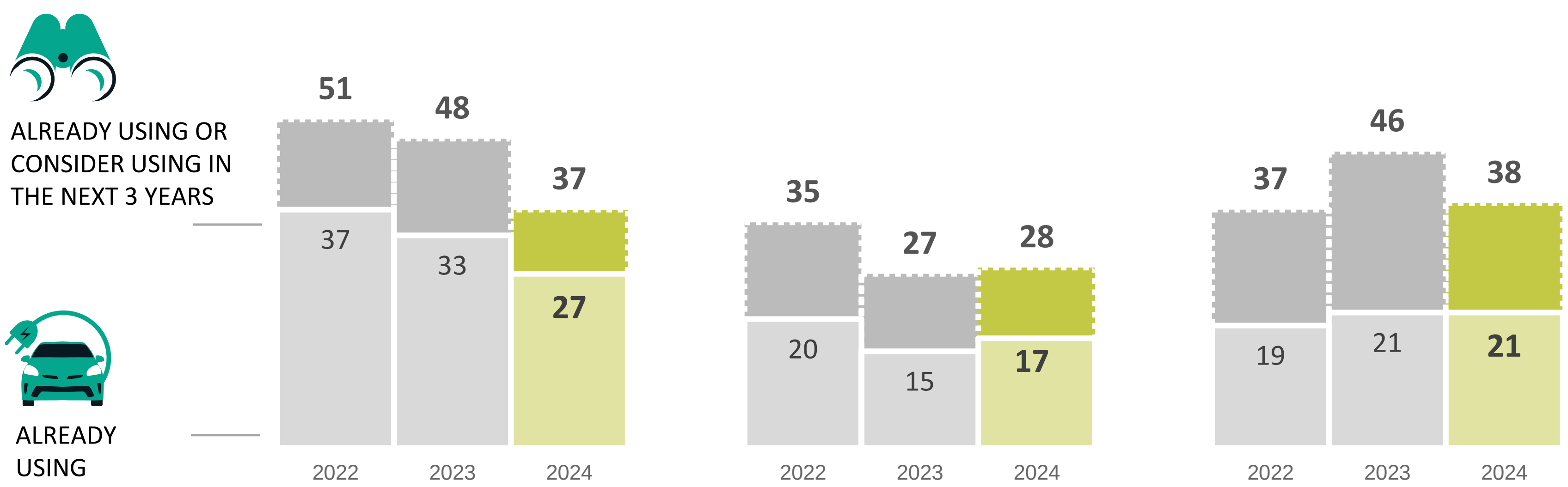
Amongst the following alternative fuel technologies, which ones do you currently use…?
Amongst the following alternative fuel technologies, which ones are you considering using…?
Basis: companies with passenger cars

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

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

In %

Passenger cars



	Plug-in Hybrid 2022	Plug-in Hybrid 2023	Plug-in Hybrid 2024	Hybrid 2022	Hybrid 2023	Hybrid 2024	100% Battery Electric Vehicle 2022	100% Battery Electric Vehicle 2023	100% Battery Electric Vehicle 2024
EU – Already using or consider using in the next 3 years	36	44	42 ▲	36	42	40 ▲	32	39	41 ▲
EU – Already using	22	30	28 ▲	25	27	27	18	22	24 ▲

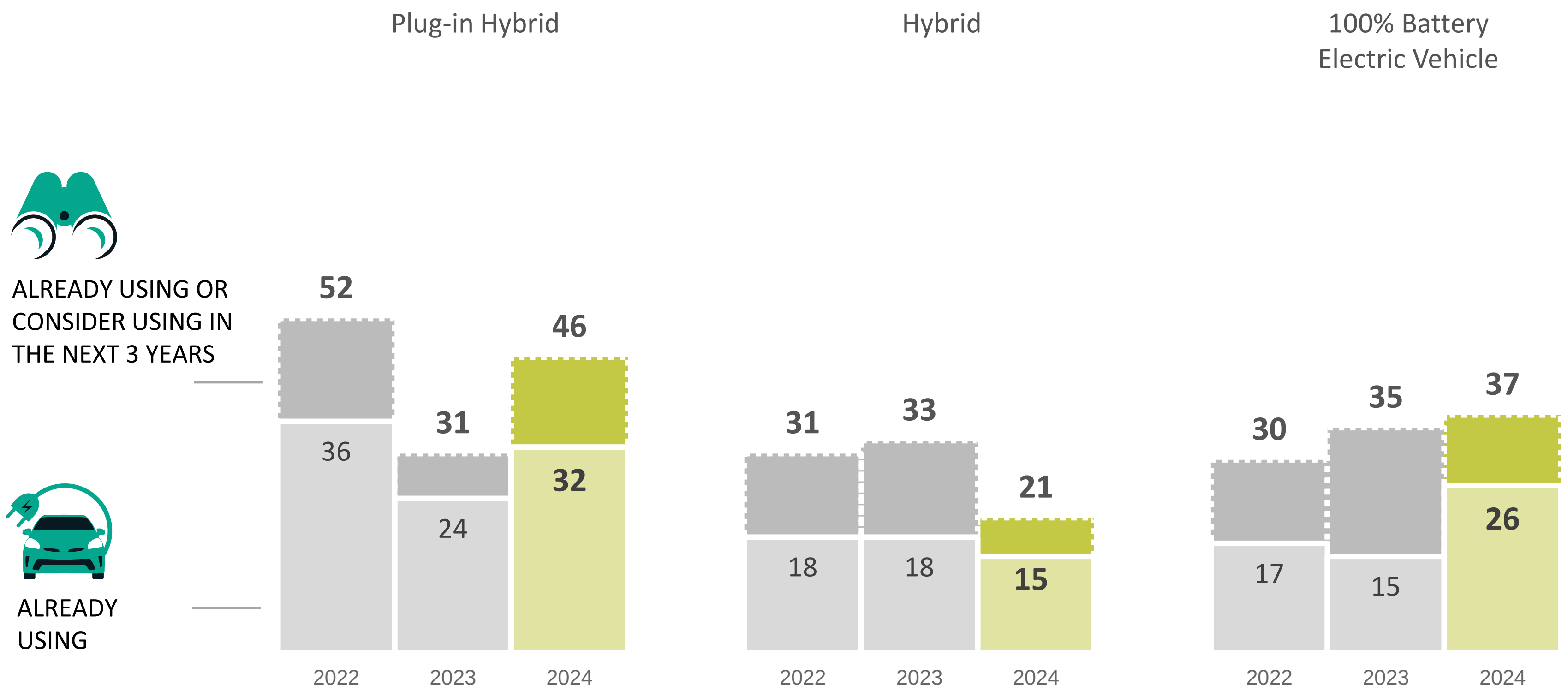
Amongst the following alternative fuel technologies, which ones do you currently use…?
Amongst the following alternative fuel technologies, which ones are you considering using…?
Basis: companies with passenger cars

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

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

In %

Passenger cars



	PHEV 2022	PHEV 2023	PHEV 2024	Hybrid 2022	Hybrid 2023	Hybrid 2024	BEV 2022	BEV 2023	BEV 2024
EU – Already using or consider using	37	42	44 ▲	38	44	40	34	39	42 ▲
EU – Already using	23	26	30 ▲	25	28	26	18	22	26 ▲

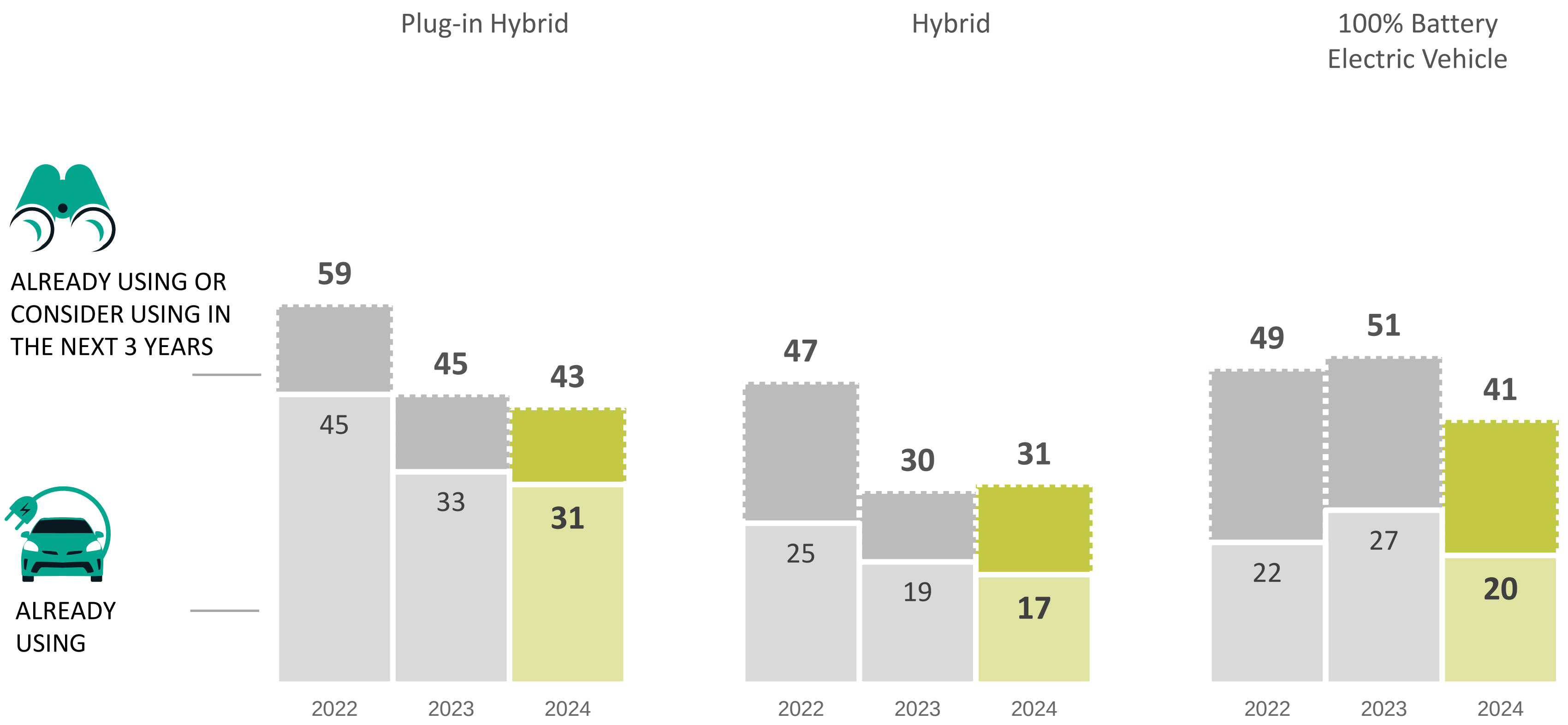
Amongst the following alternative fuel technologies, which ones do you currently use…?
Amongst the following alternative fuel technologies, which ones are you considering using…?
Basis: companies with passenger cars

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

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

In %

Passenger cars



	Plug-in Hybrid 2022	Plug-in Hybrid 2023	Plug-in Hybrid 2024	Hybrid 2022	Hybrid 2023	Hybrid 2024	100% Battery Electric Vehicle 2022	100% Battery Electric Vehicle 2023	100% Battery Electric Vehicle 2024
EU – already using or consider using	37	44	43 ▲	40	43	43	35	42	41 ▲
EU – already using	26	29	29	28	31	29	20	24	24 ▲

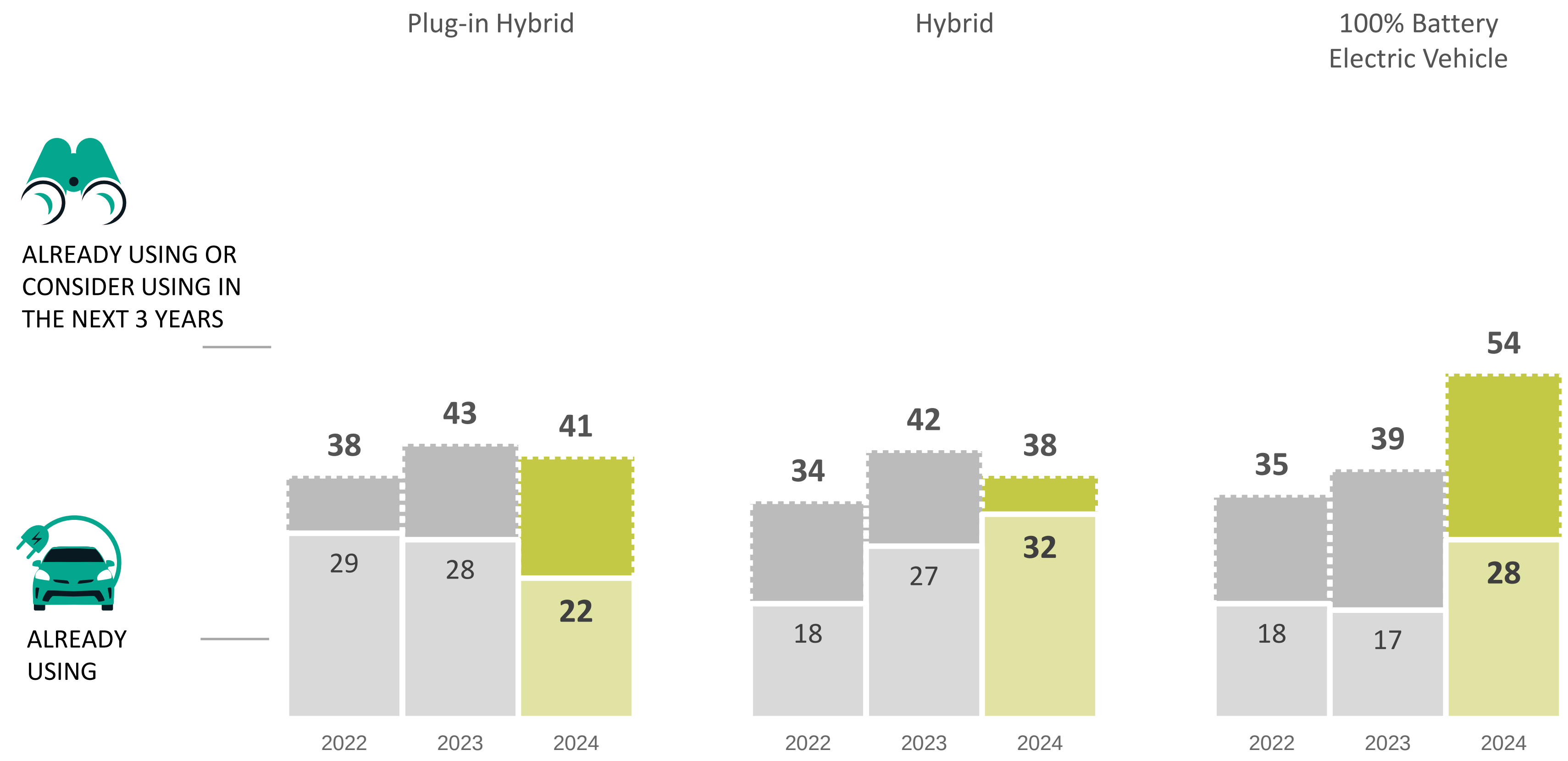
Amongst the following alternative fuel technologies, which ones do you currently use…?
Amongst the following alternative fuel technologies, which ones are you considering using…?
Basis: companies with passenger cars

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

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

In %

Passenger cars



EU	PHEV 2022	PHEV 2023	PHEV 2024	Hybrid 2022	Hybrid 2023	Hybrid 2024	BEV 2022	BEV 2023	BEV 2024
Already using or consider using in the next 3 years	40	46	44	40	46	45 ▲	37	40	44 ▲
Already using	27	32	29	28	33	30	22	26	25

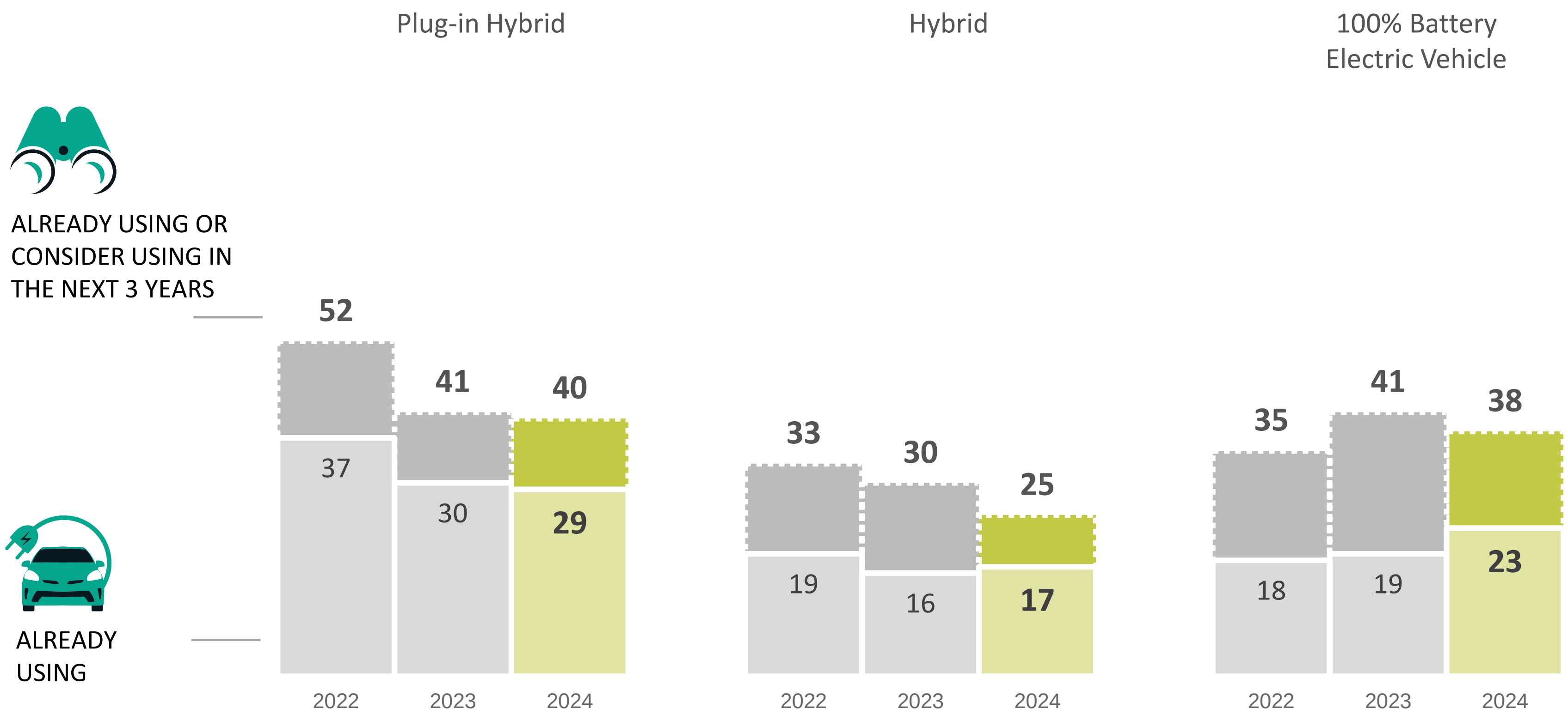
Amongst the following alternative fuel technologies, which ones do you currently use…?
Amongst the following alternative fuel technologies, which ones are you considering using…?
Basis: companies with passenger cars

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years – Focus on 1 to 99

In %

Passenger cars



	Plug-in Hybrid 2022	Plug-in Hybrid 2023	Plug-in Hybrid 2024	Hybrid 2022	Hybrid 2023	Hybrid 2024	100% Battery Electric Vehicle 2022	100% Battery Electric Vehicle 2023	100% Battery Electric Vehicle 2024
EU – Already using or consider using in the next 3 years	37	43	42 ▲	37	43	40 ▲	33	39	41 ▲
EU – Already using	22	28	29 ▲	25	27	27	18	22	25 ▲

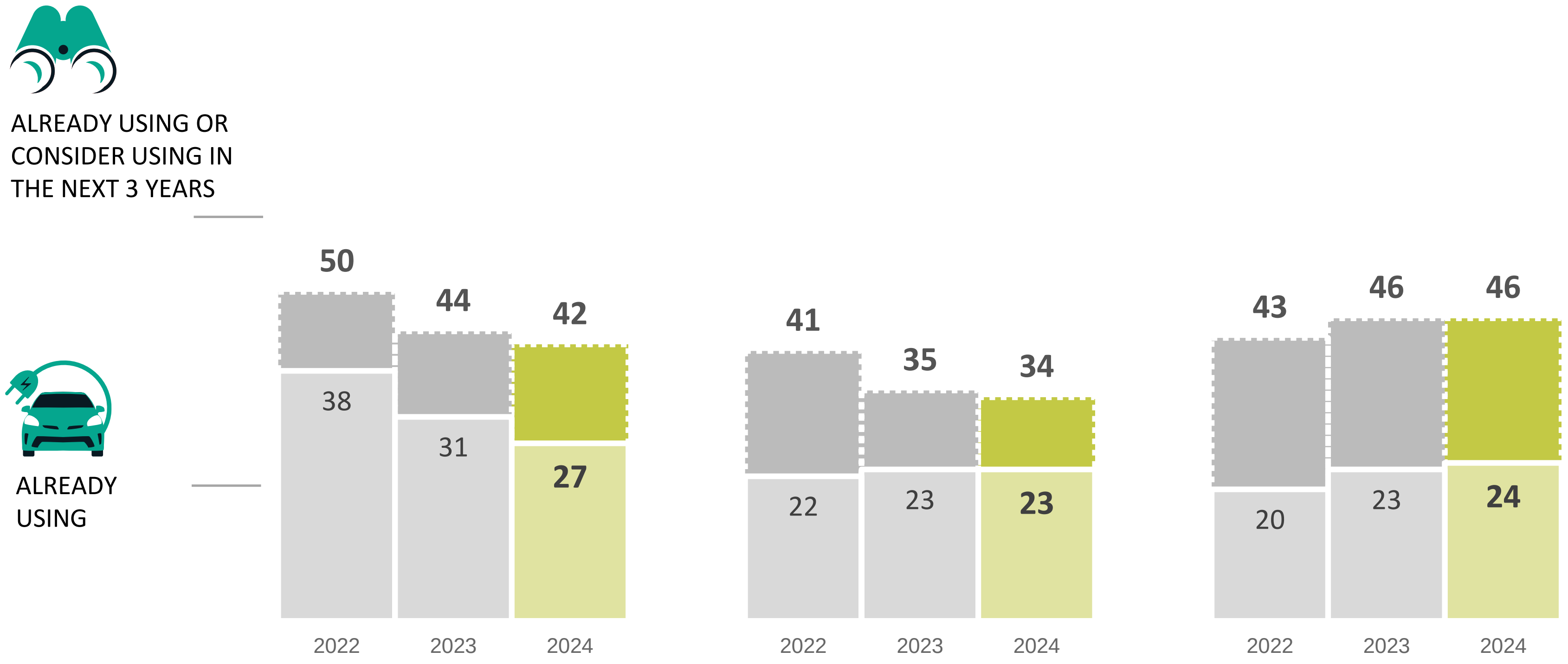
Amongst the following alternative fuel technologies, which ones do you currently use…?
Amongst the following alternative fuel technologies, which ones are you considering using…?
Basis: companies with passenger cars

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years – Focus on 100 and more

In %

Passenger cars



	Plug-in Hybrid 2022	Plug-in Hybrid 2023	Plug-in Hybrid 2024	Hybrid 2022	Hybrid 2023	Hybrid 2024	100% Battery Electric Vehicle 2022	100% Battery Electric Vehicle 2023	100% Battery Electric Vehicle 2024
EU – Already using or consider using in the next 3 years	38	45	44 ▲	40	45	44 ▲	36	41	42 ▲
EU – Already using	26	30	29	28	32	29	21	25	24 ▲

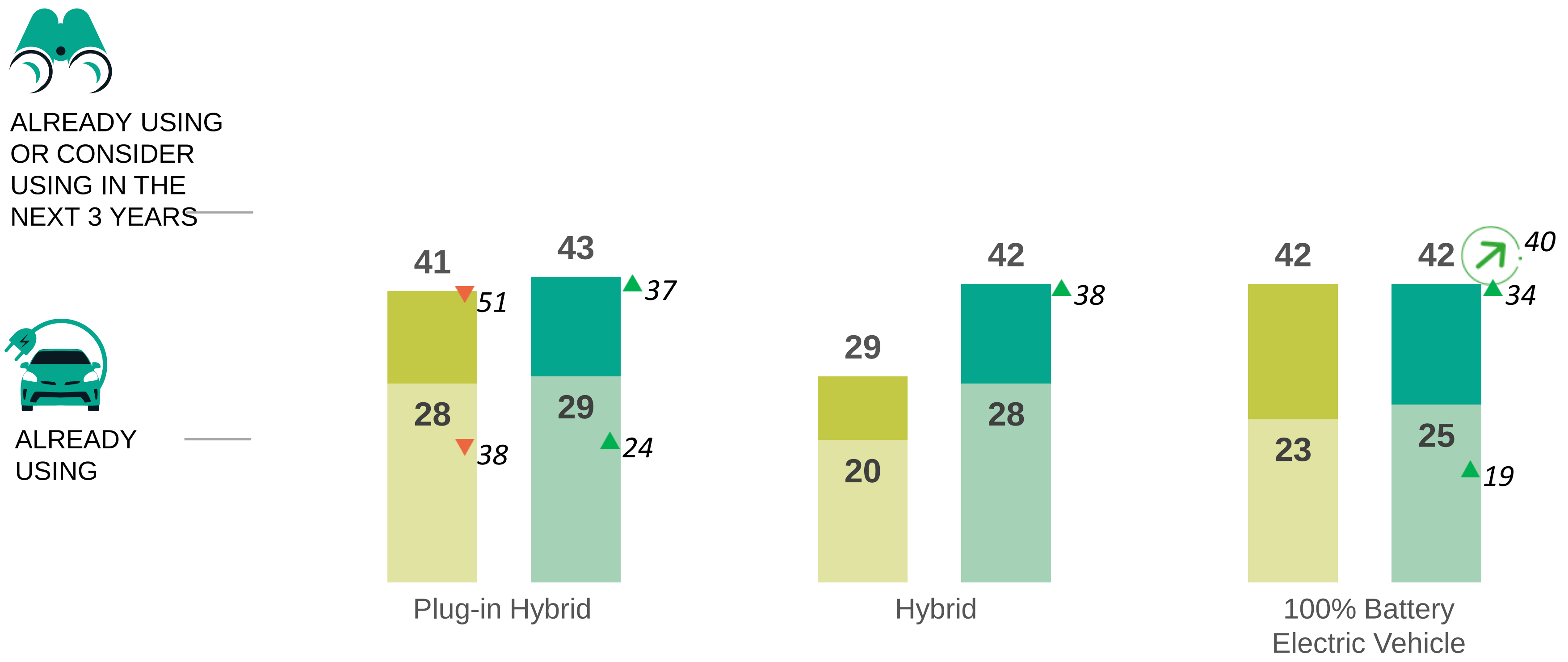
Amongst the following alternative fuel technologies, which ones do you currently use…?
Amongst the following alternative fuel technologies, which ones are you considering using…?
Basis: companies with passenger cars

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Passenger car fleet

In %

Passenger cars



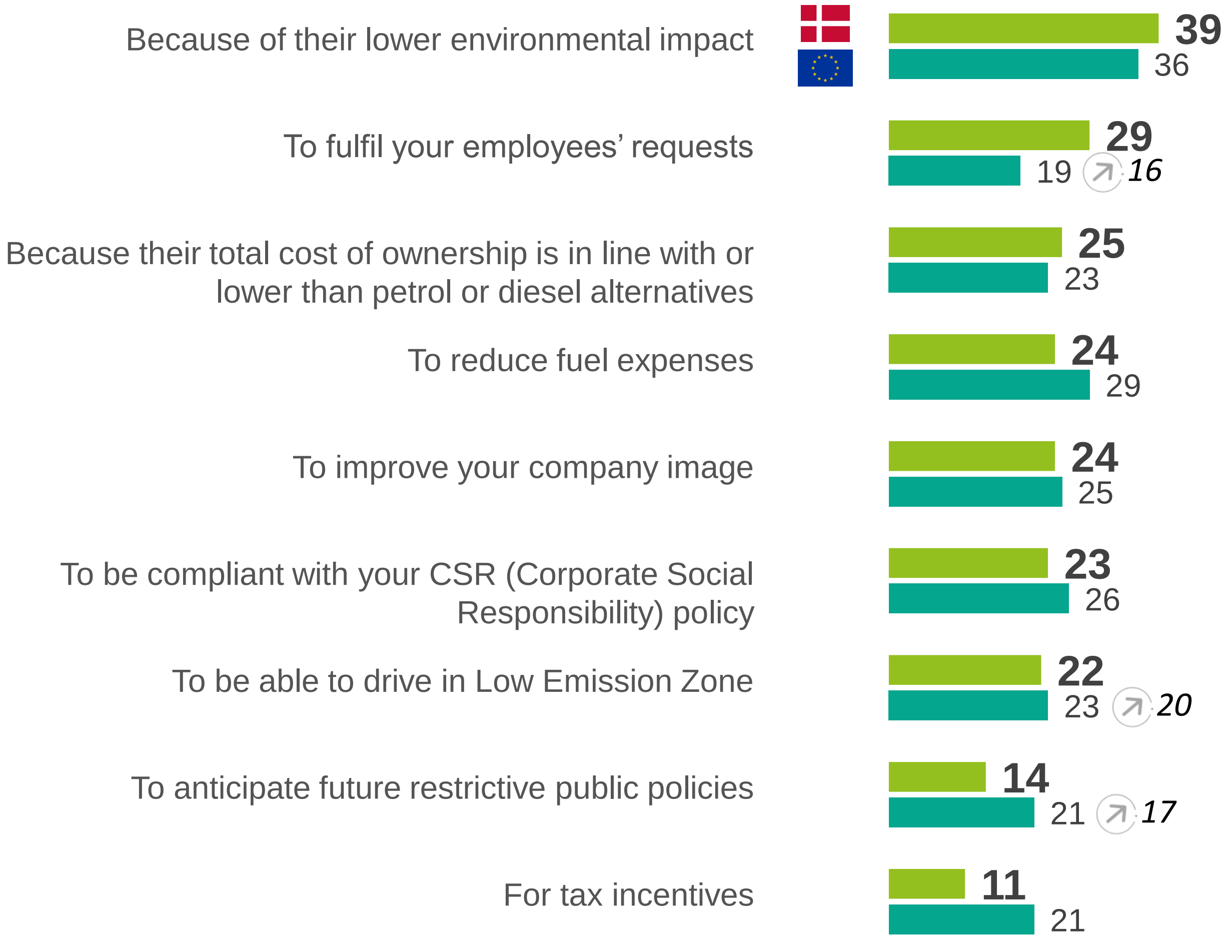
Amongst the following alternative fuel technologies, which ones do you currently use…?
Amongst the following alternative fuel technologies, which ones are you considering using…?
Basis: companies with passenger cars

REASONS FOR IMPLEMENTING OR CONSIDERING ALTERNATIVE FUEL TECHNOLOGIES

Passenger car fleet

In %

Passenger cars



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

Arval Mobility Observatory

CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

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

In %

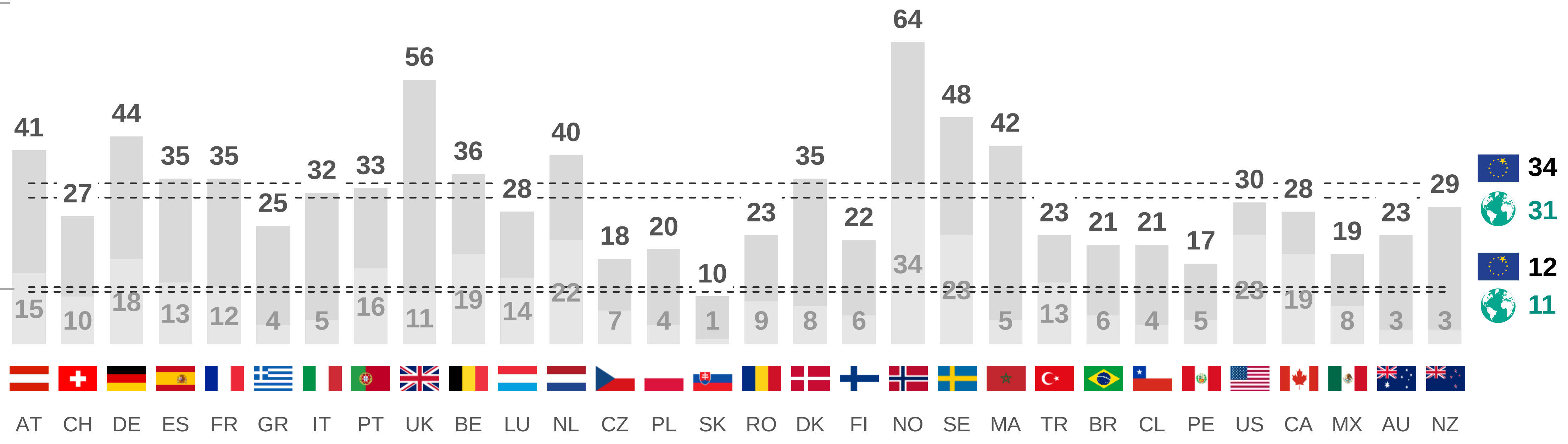
LCVs

HOW TO READ THE RESULTS ?

In Denmark, 35% of the companies are already using or consider to implement at least one alternative technology in the next 3 years. 8% of the companies is currently using at least one.

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

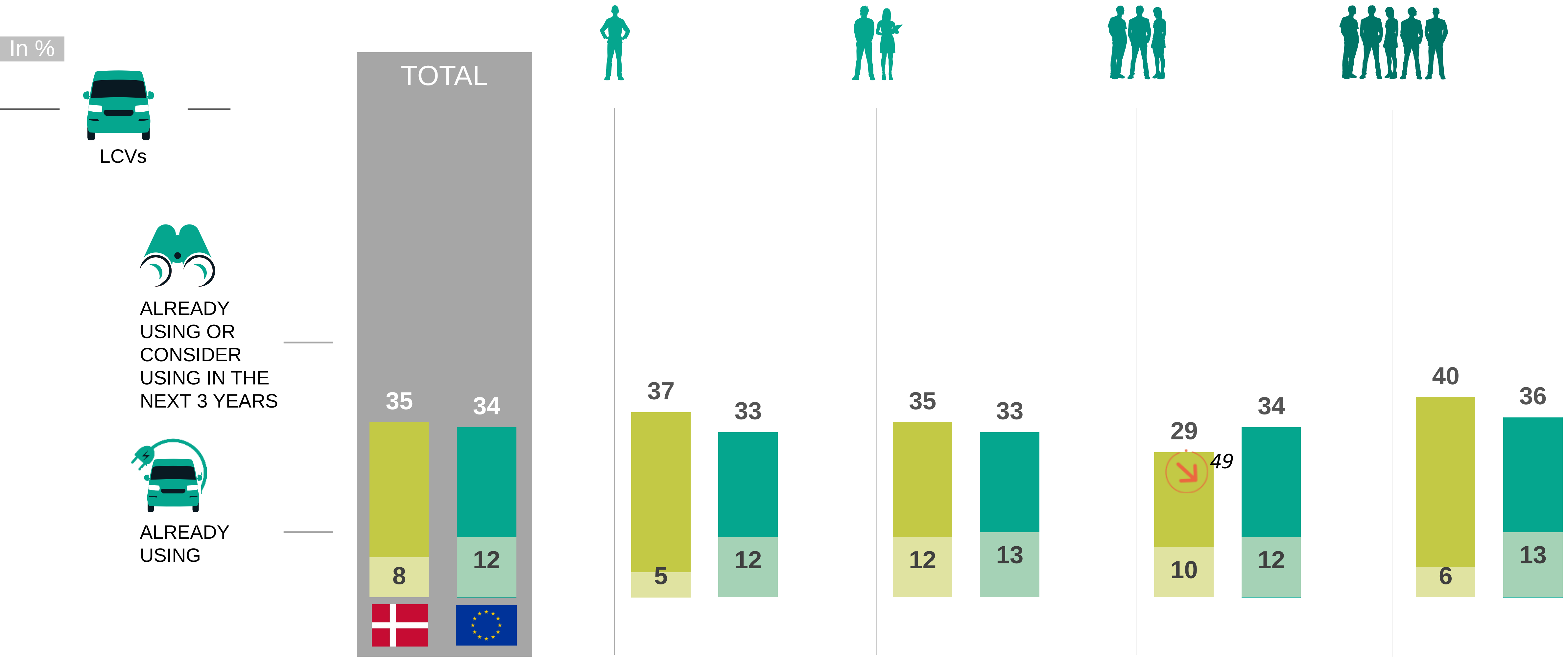
ALREADY USING



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

CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

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



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

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years

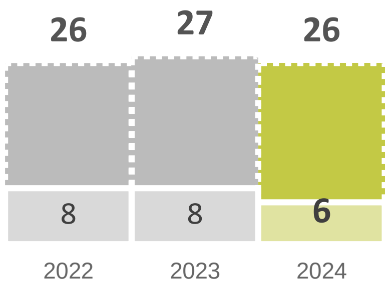
In %

LCVs

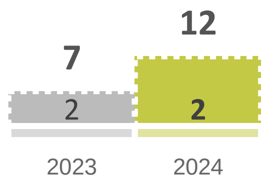
ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

ALREADY USING

100% Battery Electric Vehicle



Hydrogen Fuel cell



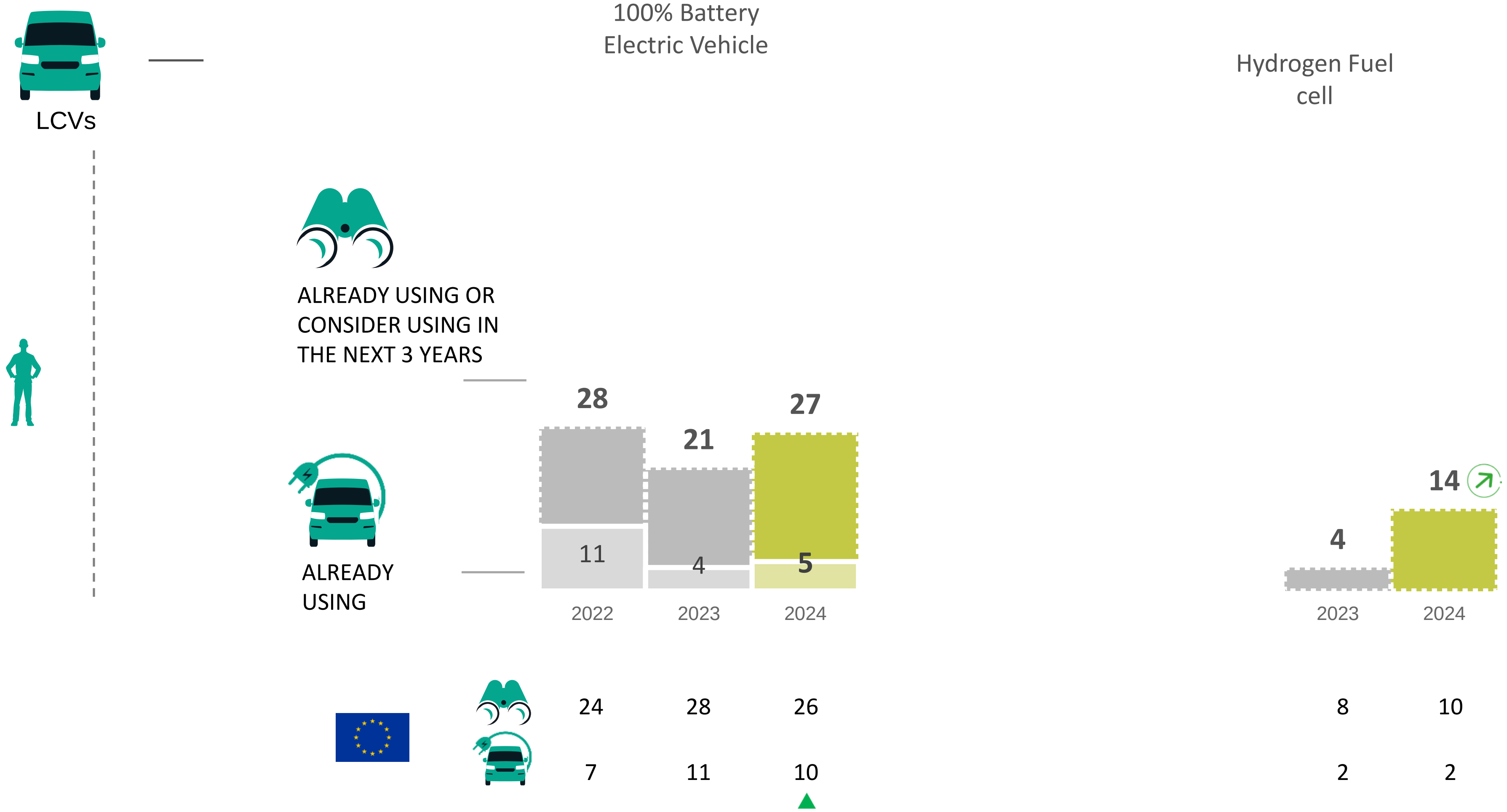
	100% BEV 2022	100% BEV 2023	100% BEV 2024	Hydrogen 2023	Hydrogen 2024
EU – Already using or consider using in the next 3 years	25	29	27 ▲	9	10
EU – Already using	8	11	11 ▲	2	2

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

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years – Less than 10 empl.

In %



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.

In %

LCVs

100% Battery Electric Vehicle

Hydrogen Fuel cell

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

ALREADY USING

	100% BEV 2022	100% BEV 2023	100% BEV 2024	Hydrogen 2023	Hydrogen 2024
EU – already using or consider using	23	27	26	9	11
EU – already using	7	10	12 ▲	2	2

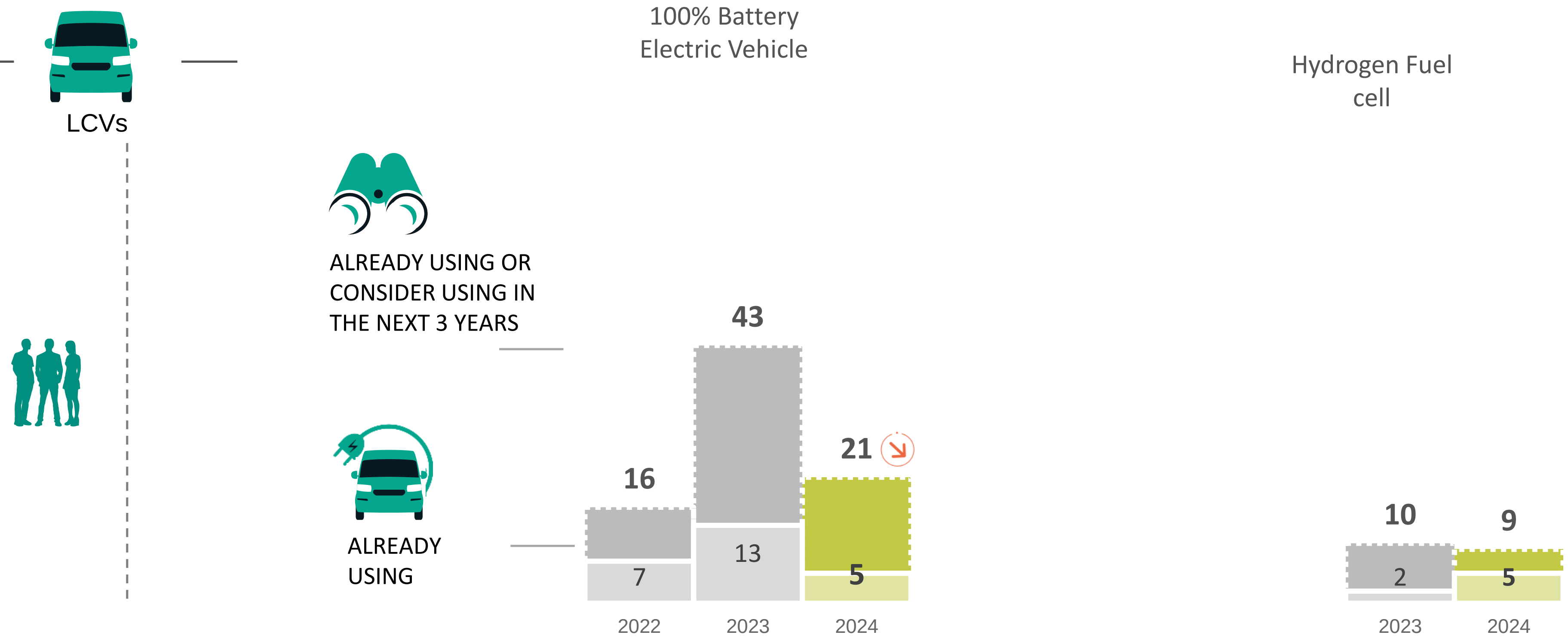
Amongst the following alternative fuel technologies, which ones do you currently use…?
Amongst the following alternative fuel technologies, which ones are you considering using…?
Basis: companies with LCVs

Arval Mobility Observatory

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years – 100 - 249 empl.

In %



	100% BEV 2022	100% BEV 2023	100% BEV 2024	Hydrogen 2023	Hydrogen 2024
EU – Already using or consider using	26	30	29	9	8
EU – Already using	9	12	10	2	2

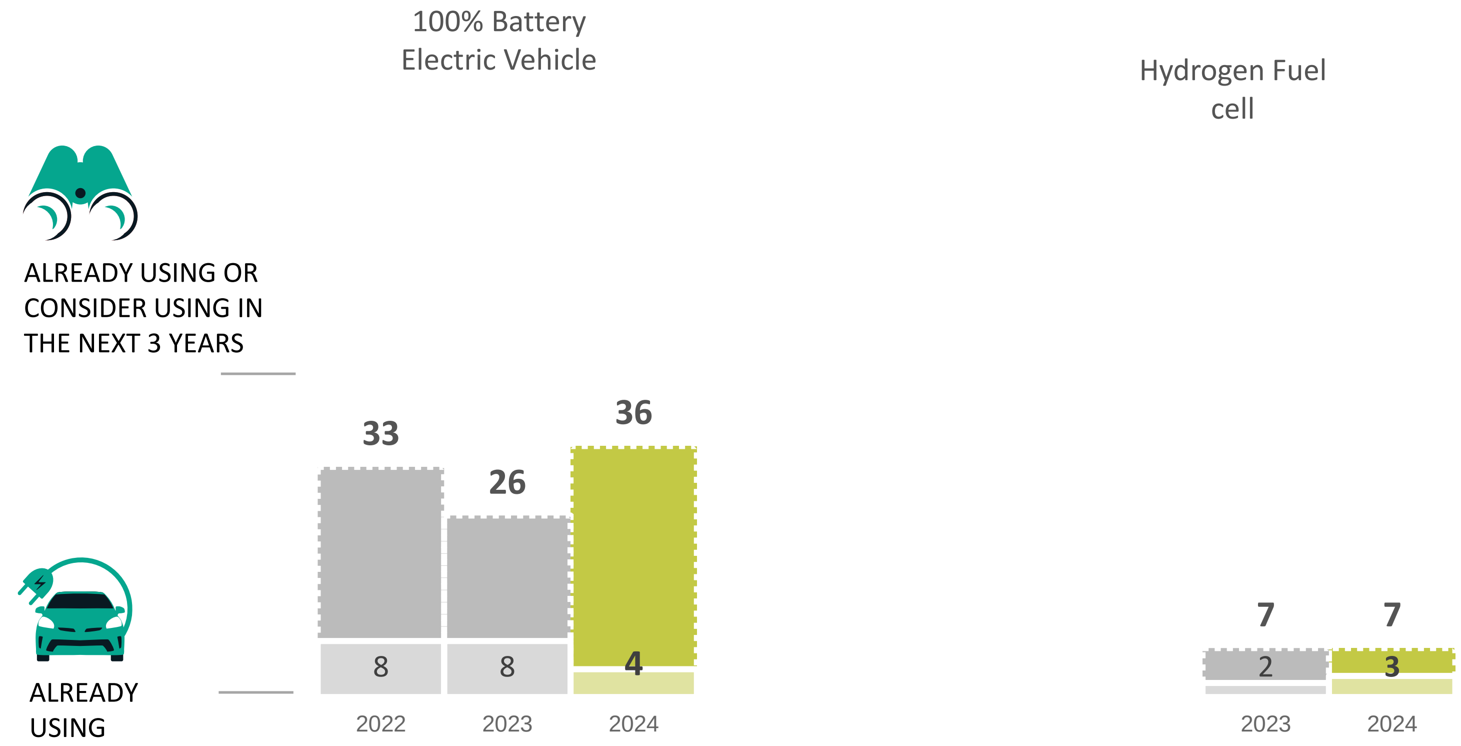
Amongst the following alternative fuel technologies, which ones do you currently use…?
Amongst the following alternative fuel technologies, which ones are you considering using…?
Basis: companies with LCVs

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years – 250 empl. or more

In %

LCVs



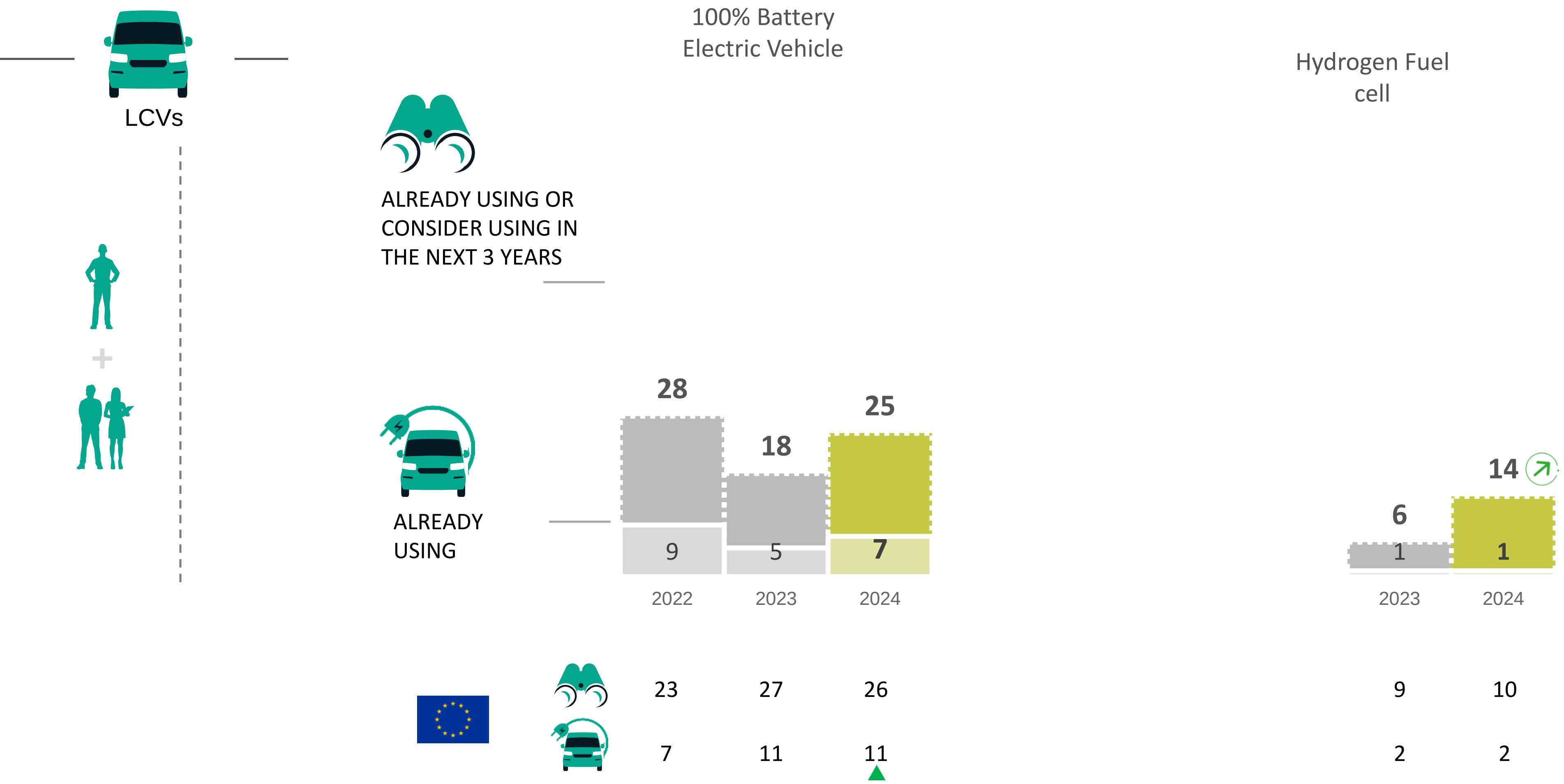
	100% Battery Electric Vehicle 2022	2023	2024	Hydrogen Fuel cell 2023	2024
Already using or consider using in the next 3 years	26	32	29	9	10
Already using	10	12	11	2	2

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

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years – Focus on 1 to 99

In %



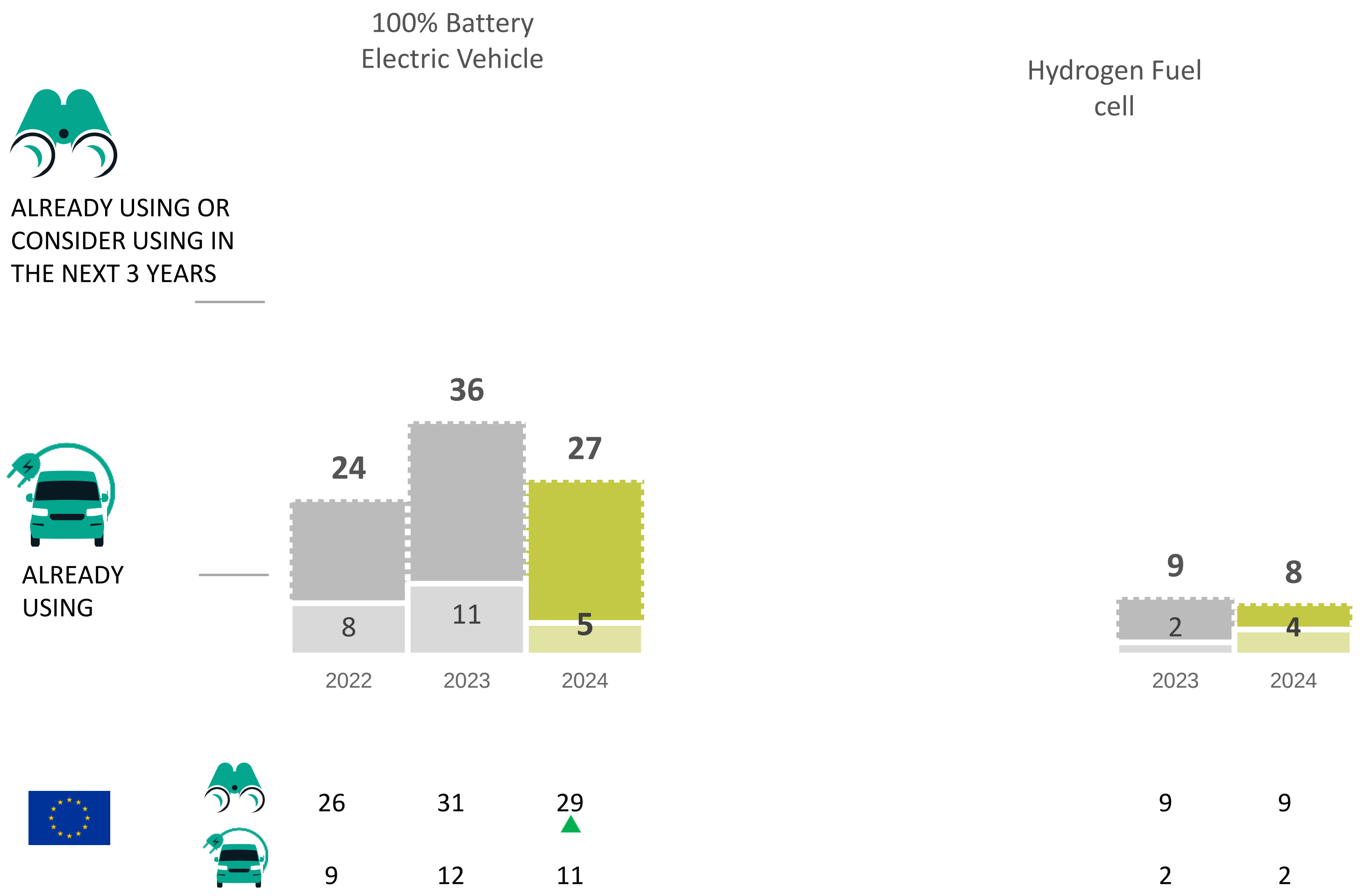
Amongst the following alternative fuel technologies, which ones do you currently use…?
Amongst the following alternative fuel technologies, which ones are you considering using…?
Basis: companies with LCVs

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years – Focus on 100 and more

In %

LCVs



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

Arval Mobility Observatory

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

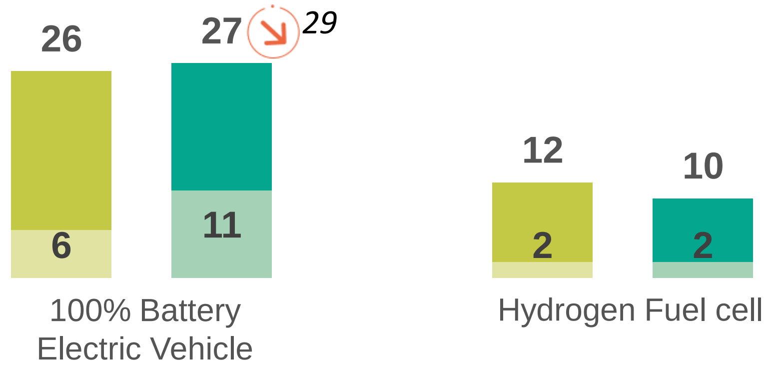
LCV Fleet

In %

LCVs

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

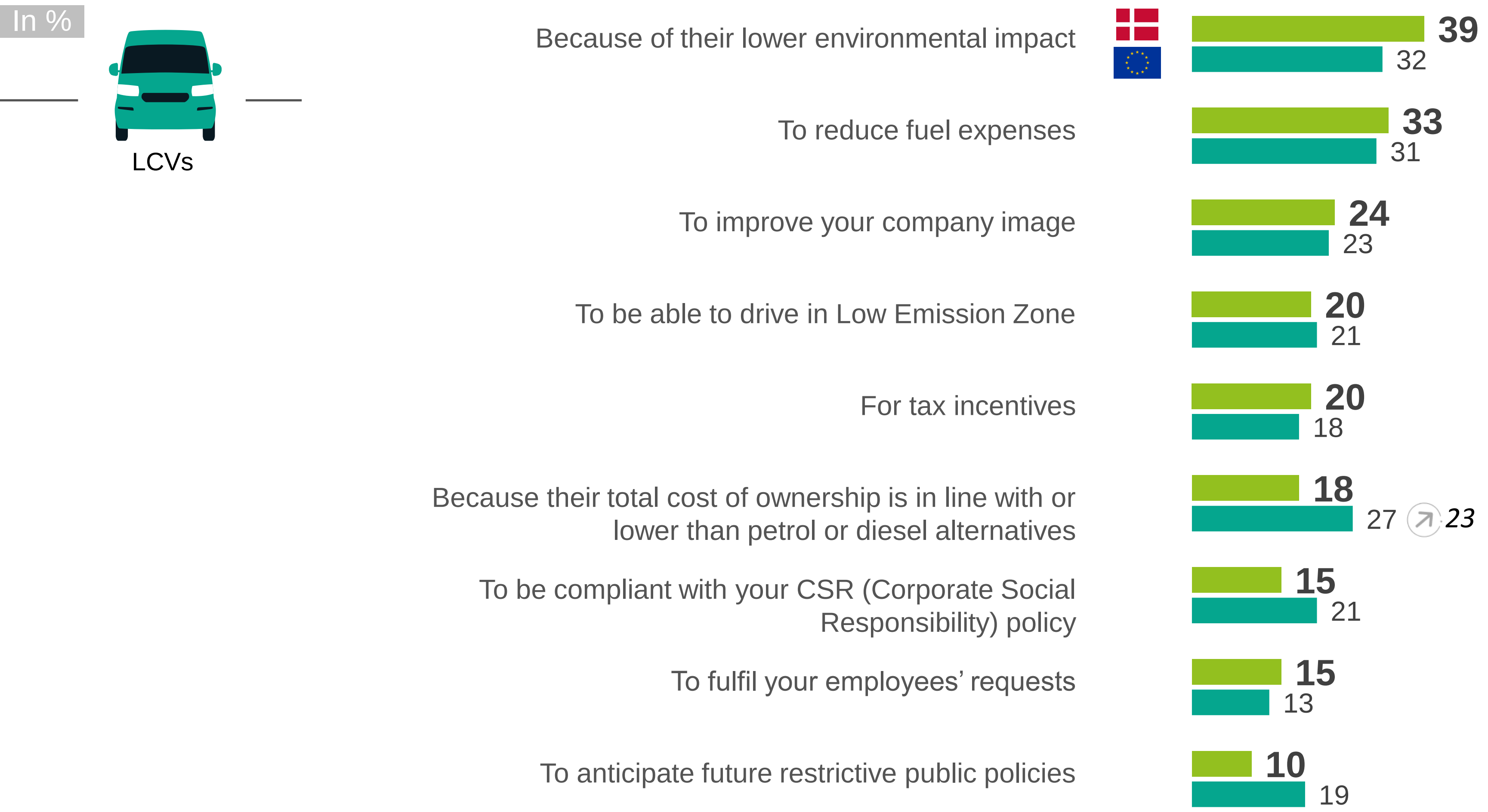
ALREADY IMPLEMENTED



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

REASONS FOR IMPLEMENTING OR CONSIDERING ALTERNATIVE FUEL TECHNOLOGIES

LCV fleet



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

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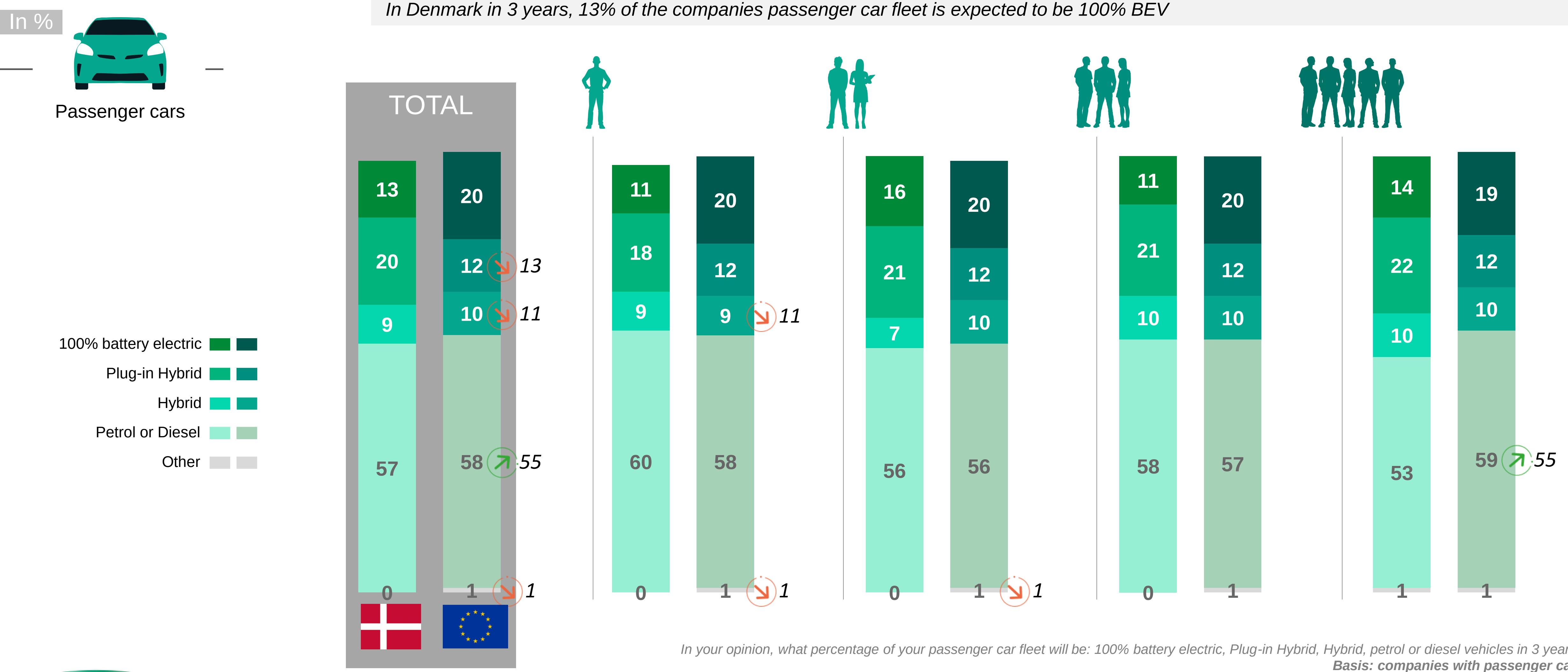
EXPECTED FLEET SHARE PER ENERGY

HOW TO READ THE RESULTS ?

In Denmark in 3 years, 13% of the companies passenger car fleet is expected to be 100% BEV



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

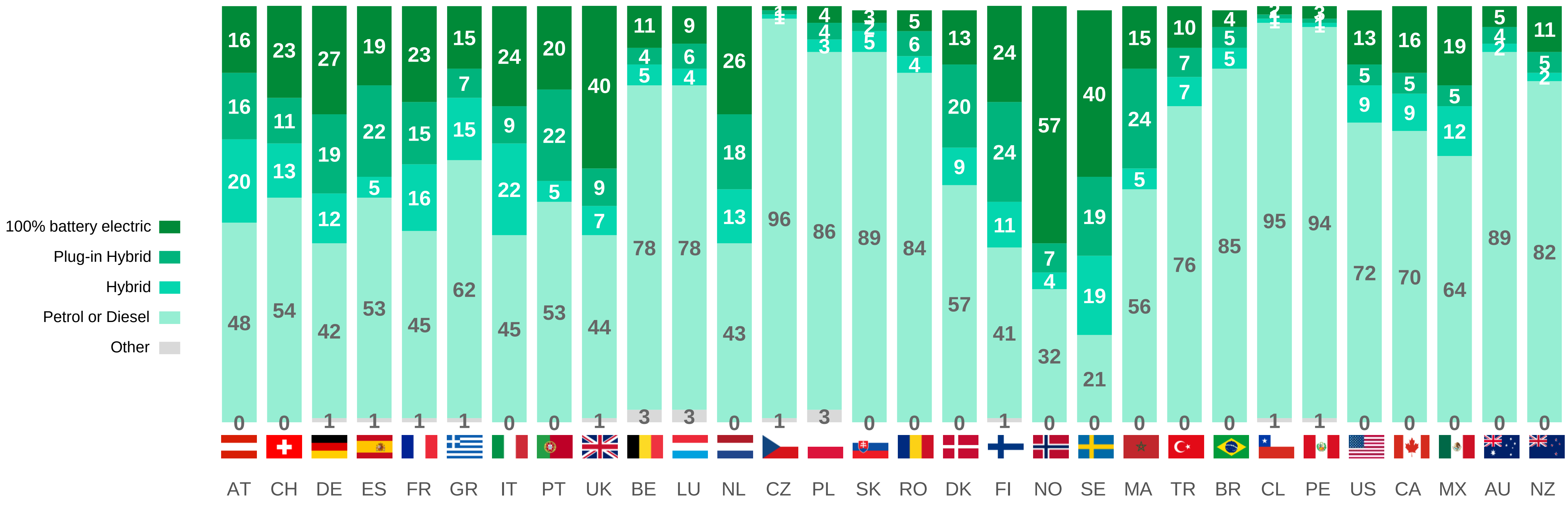
EXPECTED FLEET SHARE PER ENERGY

HOW TO READ THE RESULTS ?

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

In %

Passenger cars



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

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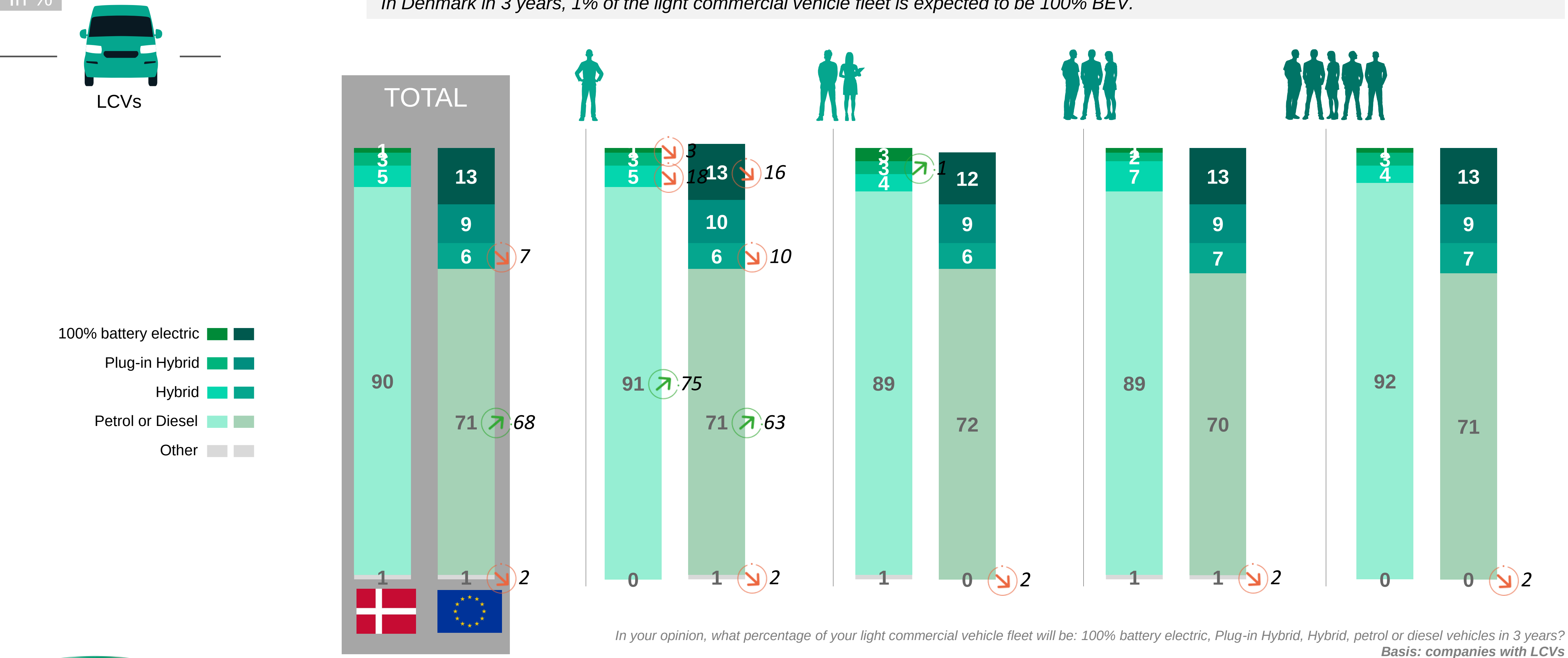
EXPECTED FLEET SHARE PER ENERGY

HOW TO READ THE RESULTS ?

In Denmark in 3 years, 1% of the light commercial vehicle fleet is expected to be 100% BEV.

In %



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

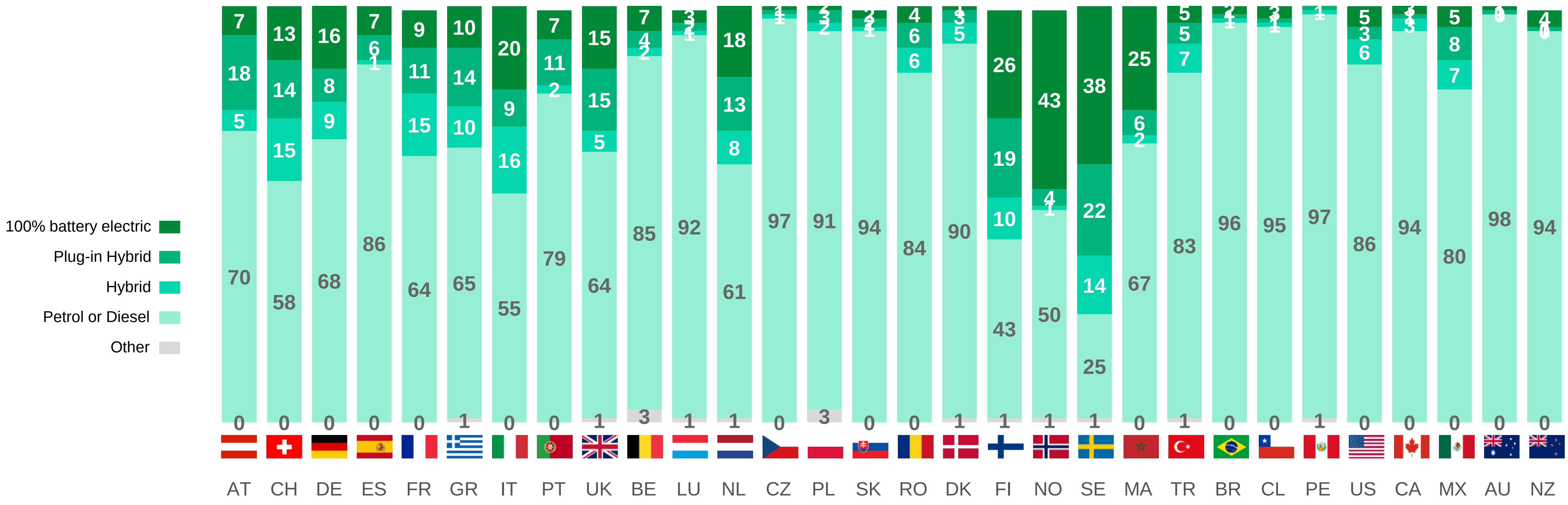
EXPECTED FLEET SHARE PER ENERGY

HOW TO READ THE RESULTS ?

In Denmark in 3 years, 1% of the light commercial vehicle fleet is expected to be 100% BEV.

In %

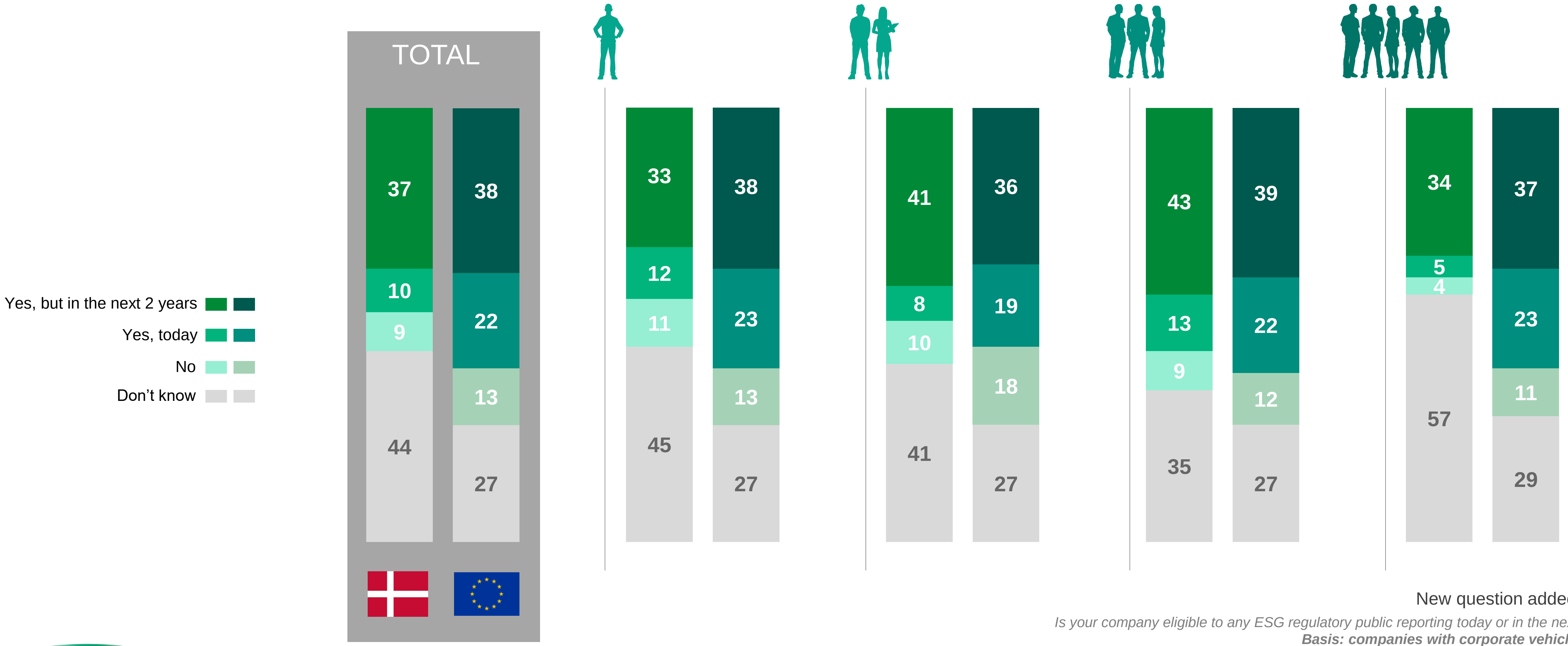
LCVs



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

ELIGIBILITY TO ESG REGULATORY PUBLIC REPORTING

In %

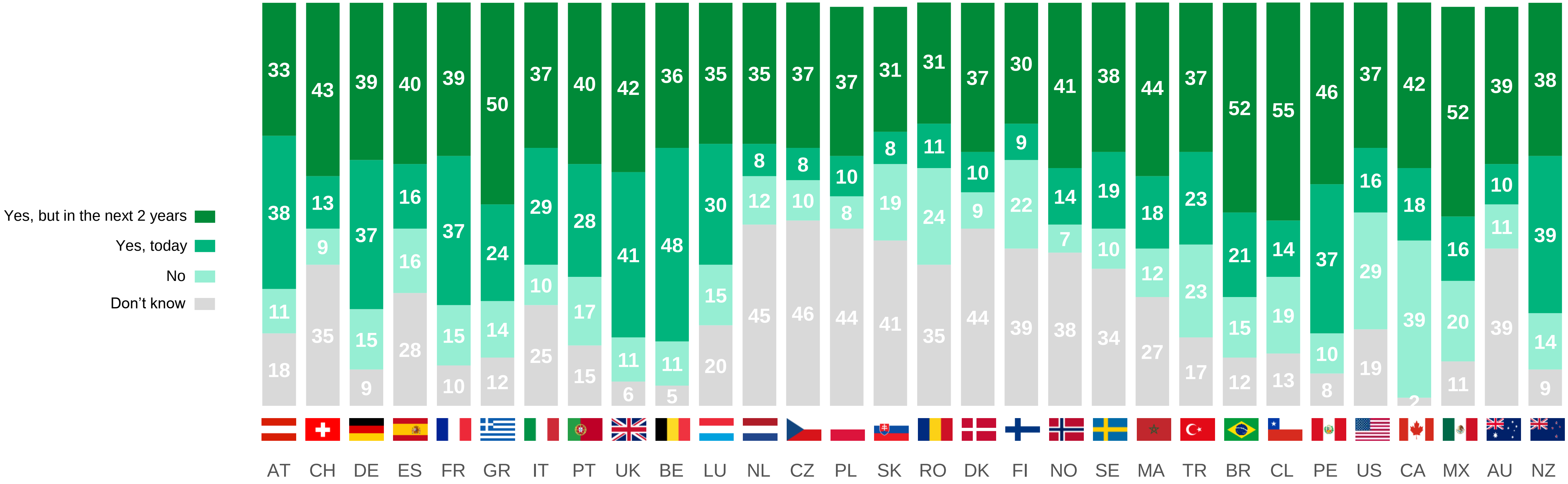


New question added in 2024

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

ELIGIBILITY TO ESG REGULATORY PUBLIC REPORTING

In %



New question added in 2024

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

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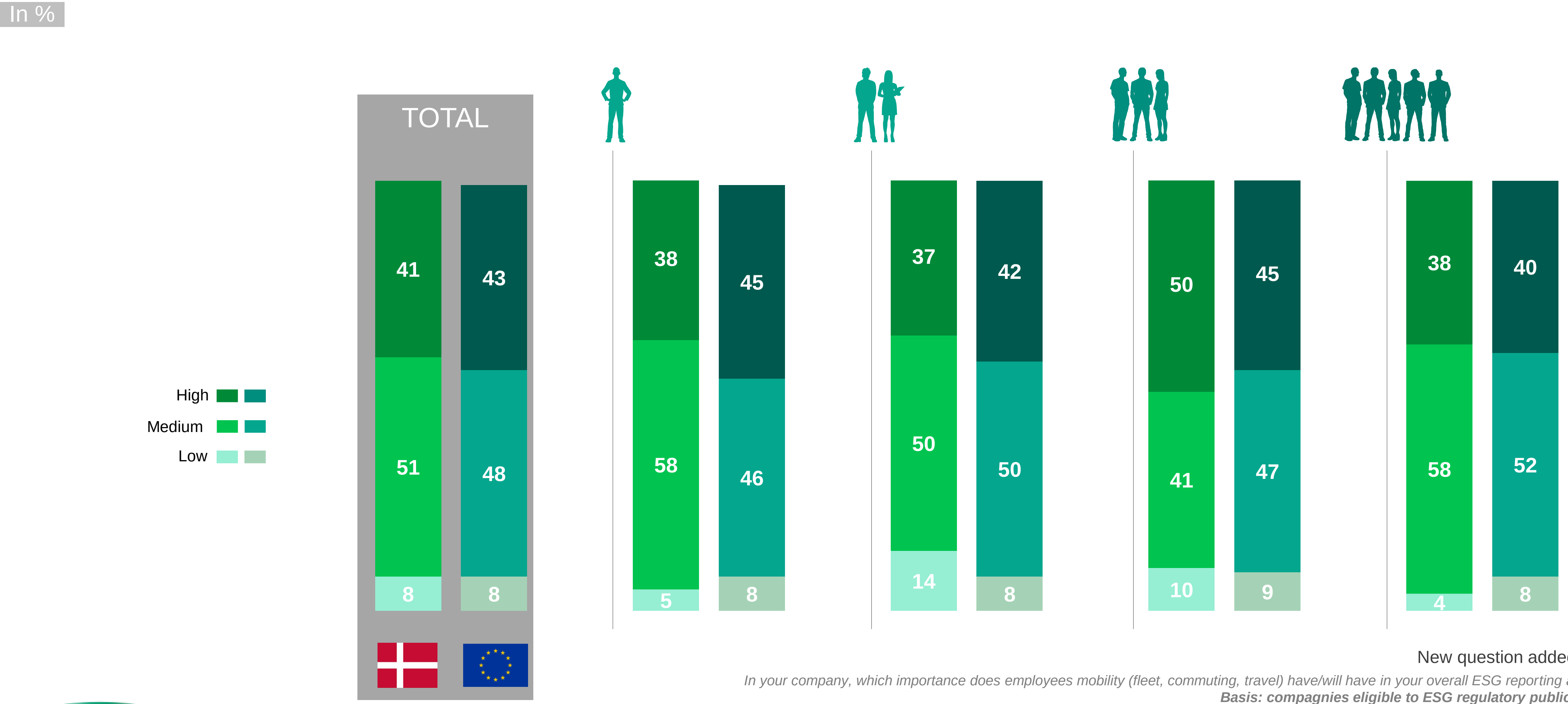
IMPORTANCE OF EMPLOYEES MOBILITY IN ESG REPORTING



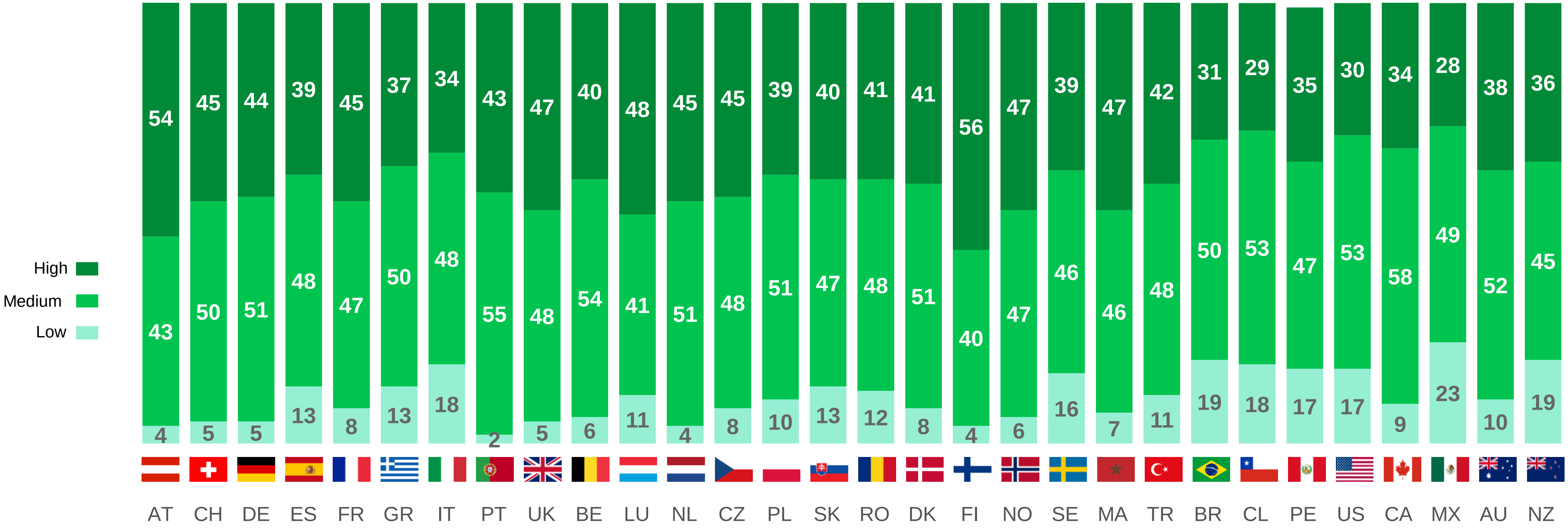
New question added in 2024

In your company, which importance does employees mobility (fleet, commuting, travel) have/will have in your overall ESG reporting approach ?

Basis: compagnies eligible to ESG regulatory public reporting

IMPORTANCE OF EMPLOYEES MOBILITY IN ESG REPORTING

In %



New question added in 2024

In your company, which importance does employees mobility (fleet, commuting, travel) have/will have in your overall ESG reporting approach ?
Basis: compagnies eligible to ESG regulatory public reporting

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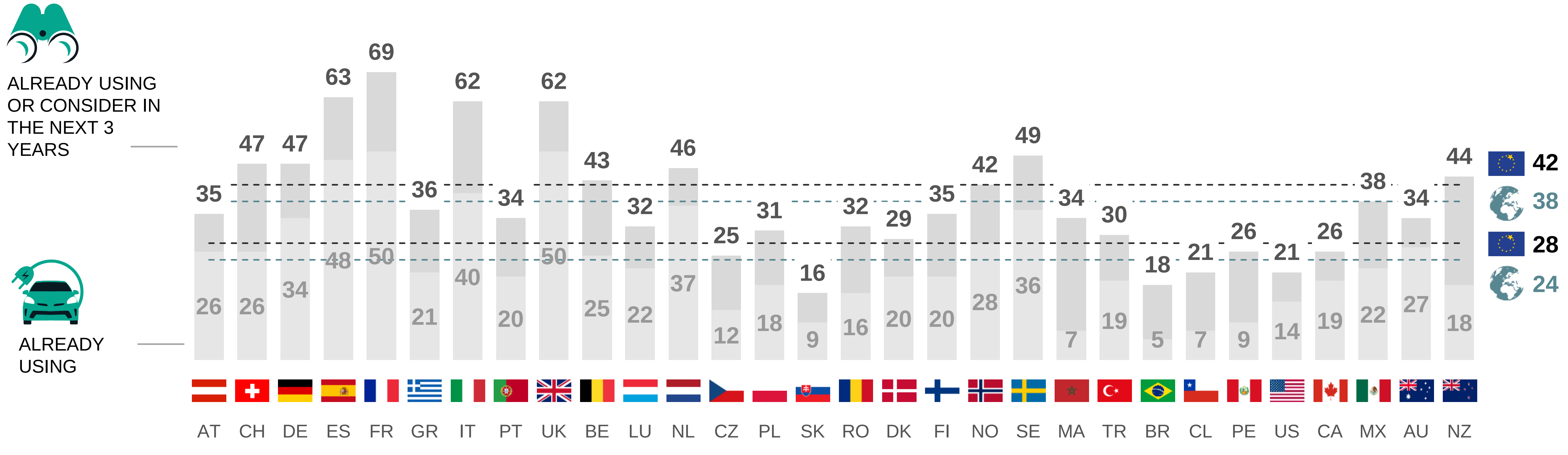
5

ENERGY MIX
FOCUS PER ALTERNATIVE TECHNOLOGY

HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

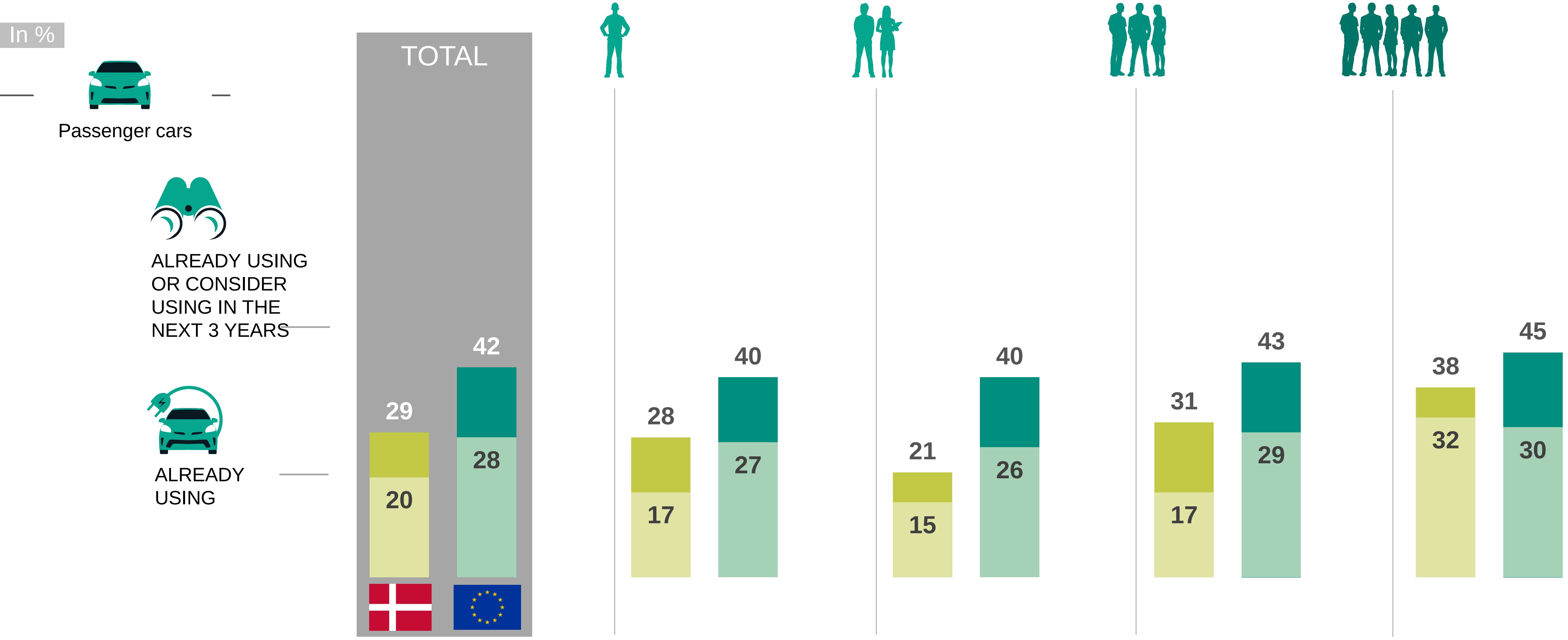
In %

Passenger cars



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

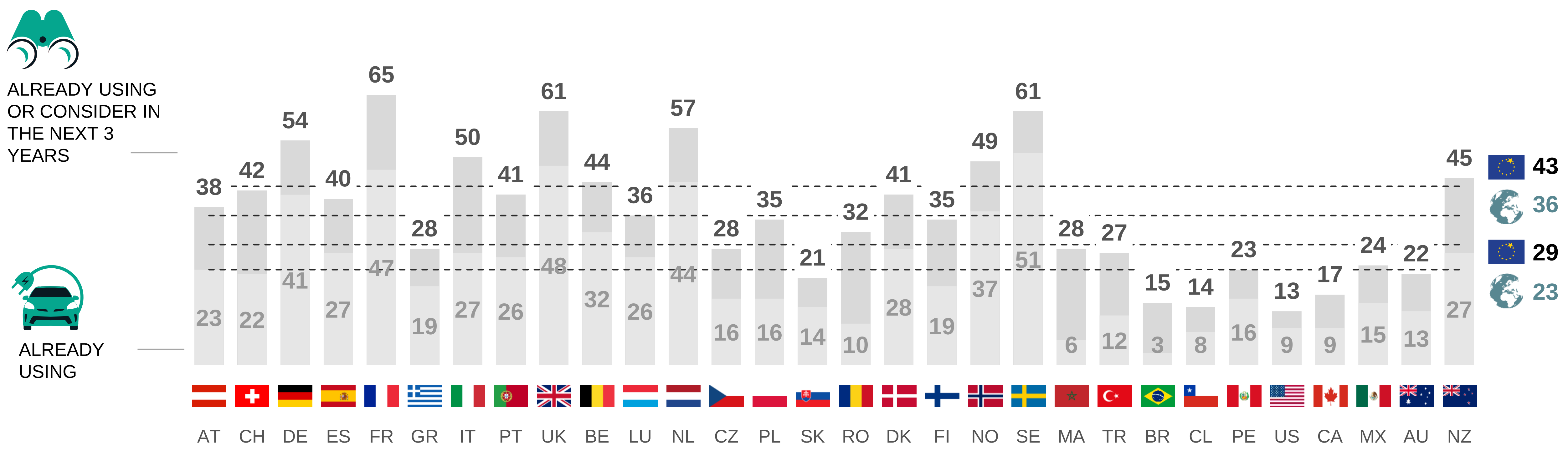


Amongst the following alternative fuel technologies, which ones do you currently use…?
Amongst the following alternative fuel technologies, which ones are you considering using…?
Basis: companies with passenger cars

PLUG-IN HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

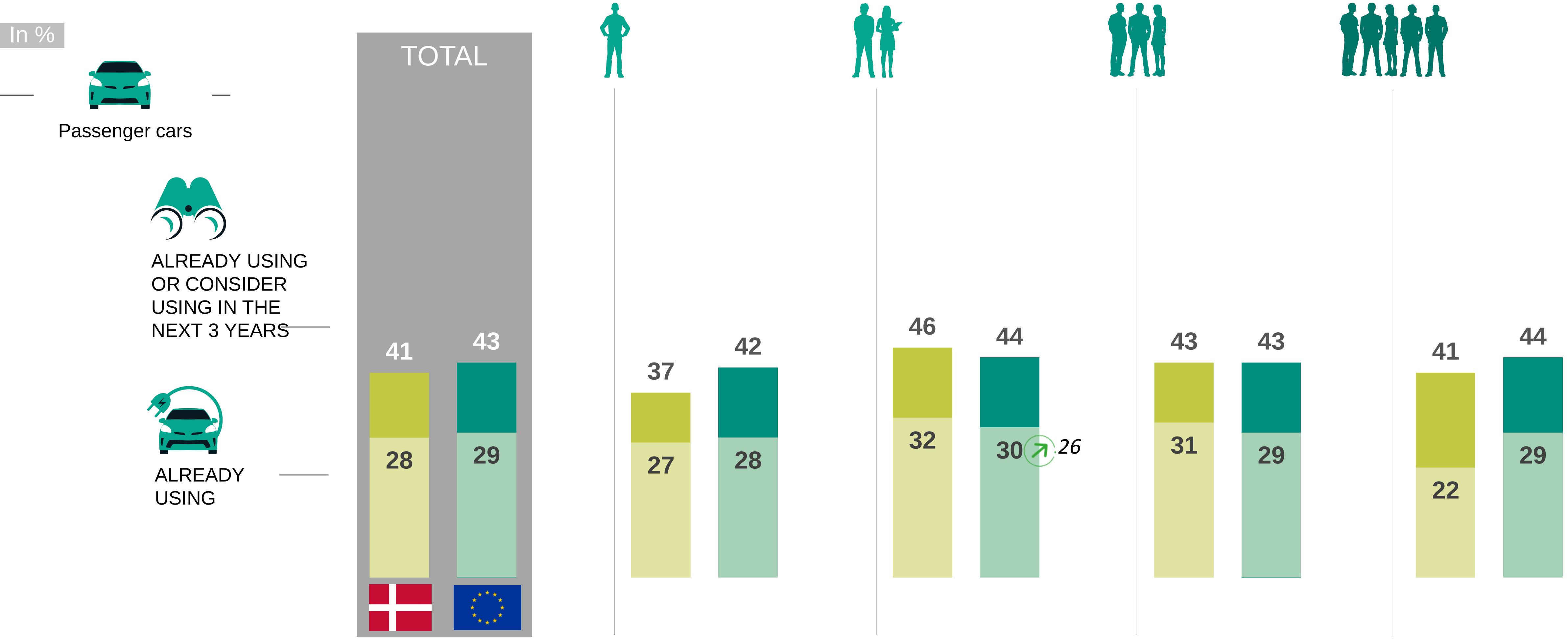
In %

Passenger cars



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

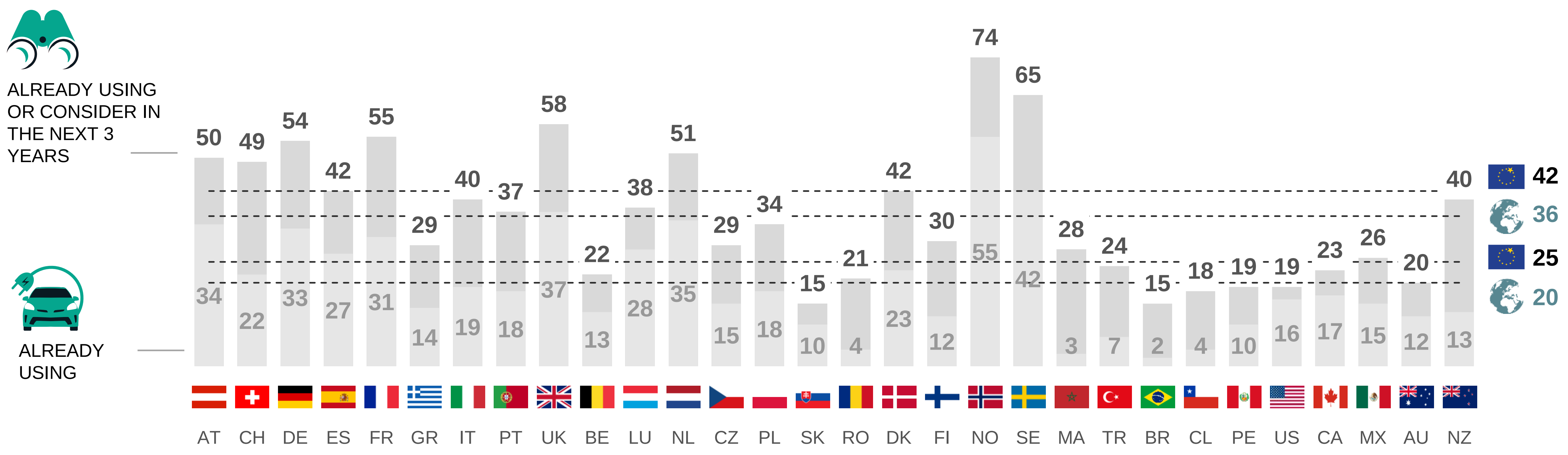


Amongst the following alternative fuel technologies, which ones do you currently use…?
Amongst the following alternative fuel technologies, which ones are you considering using…?
Basis: companies with passenger cars

100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

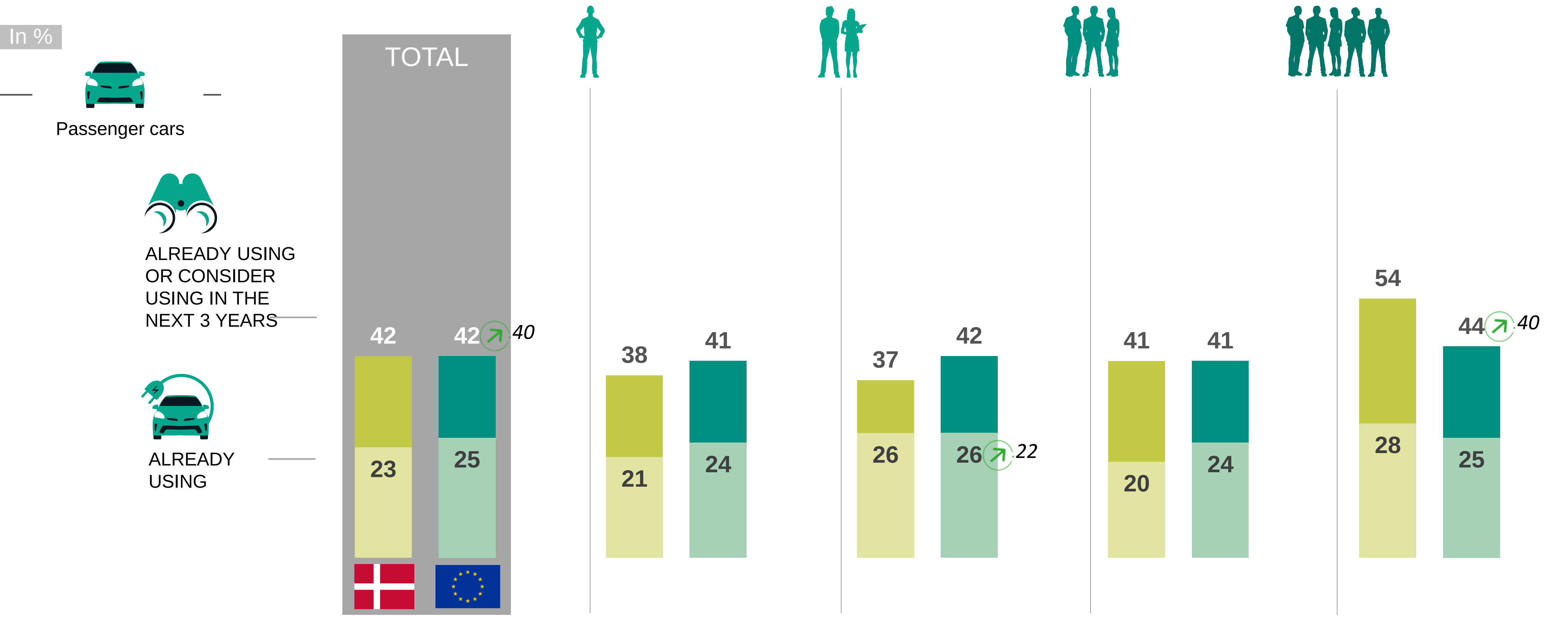
In %

Passenger cars



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



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

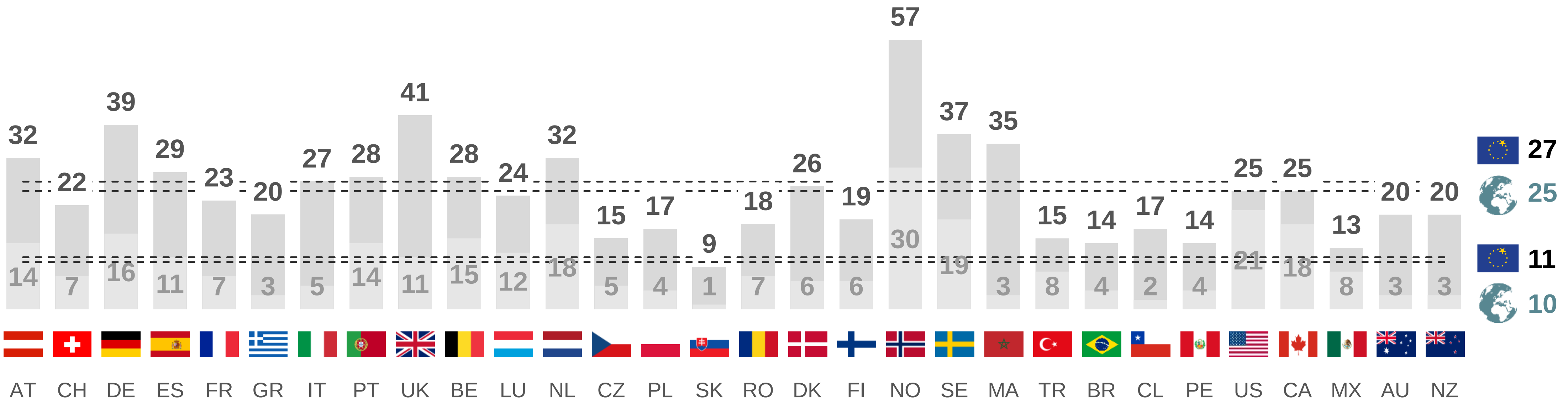
100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %

LCVs

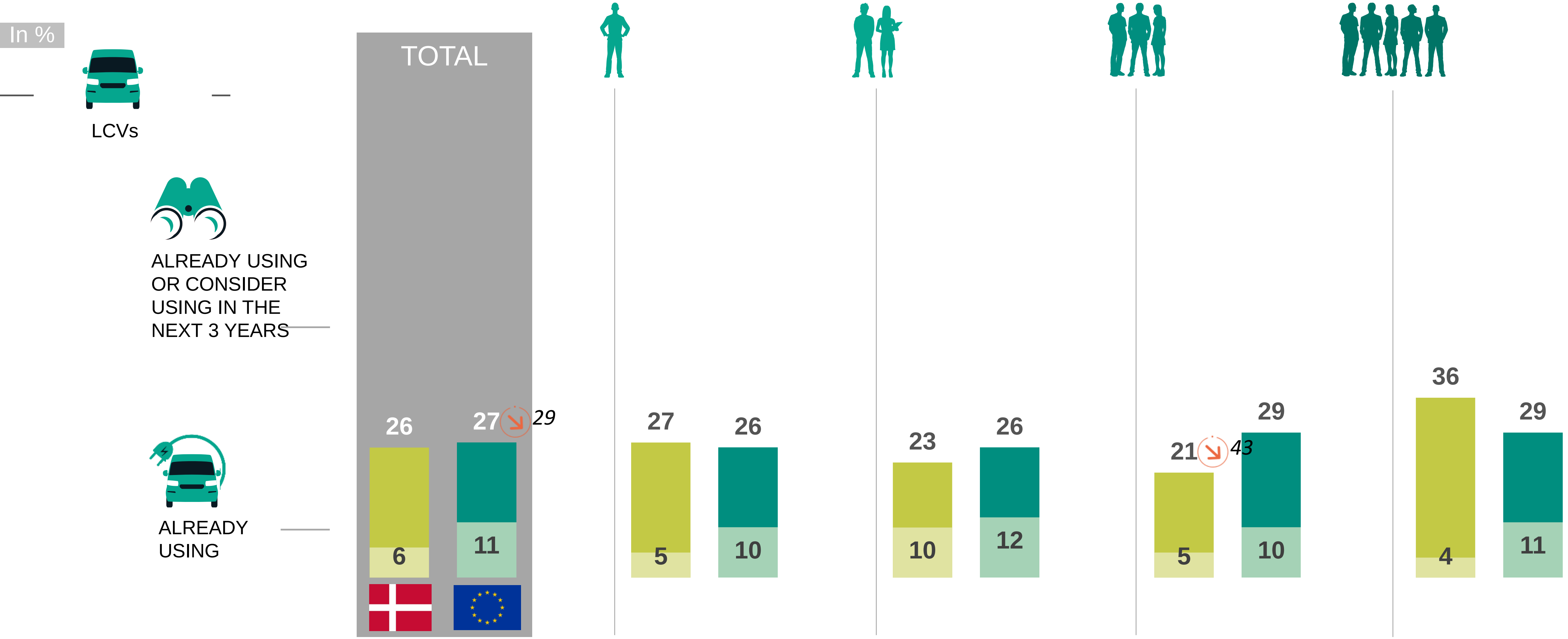
ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



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

100% BATTERY ELECTRIC VEHICLE: IMPLEMENTATION WITHIN COMPANY FLEET POLICY



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

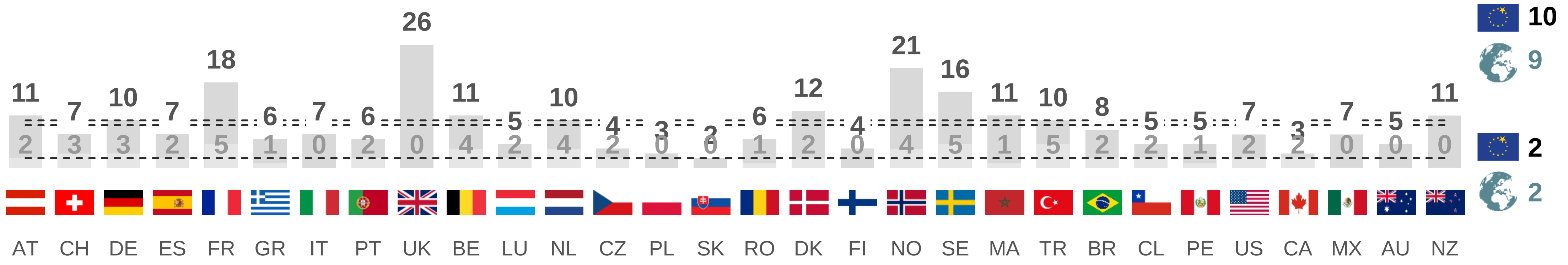
HYDROGEN FUEL CELL ELECTRIC VEHICLE : IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %

LCVs

ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



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

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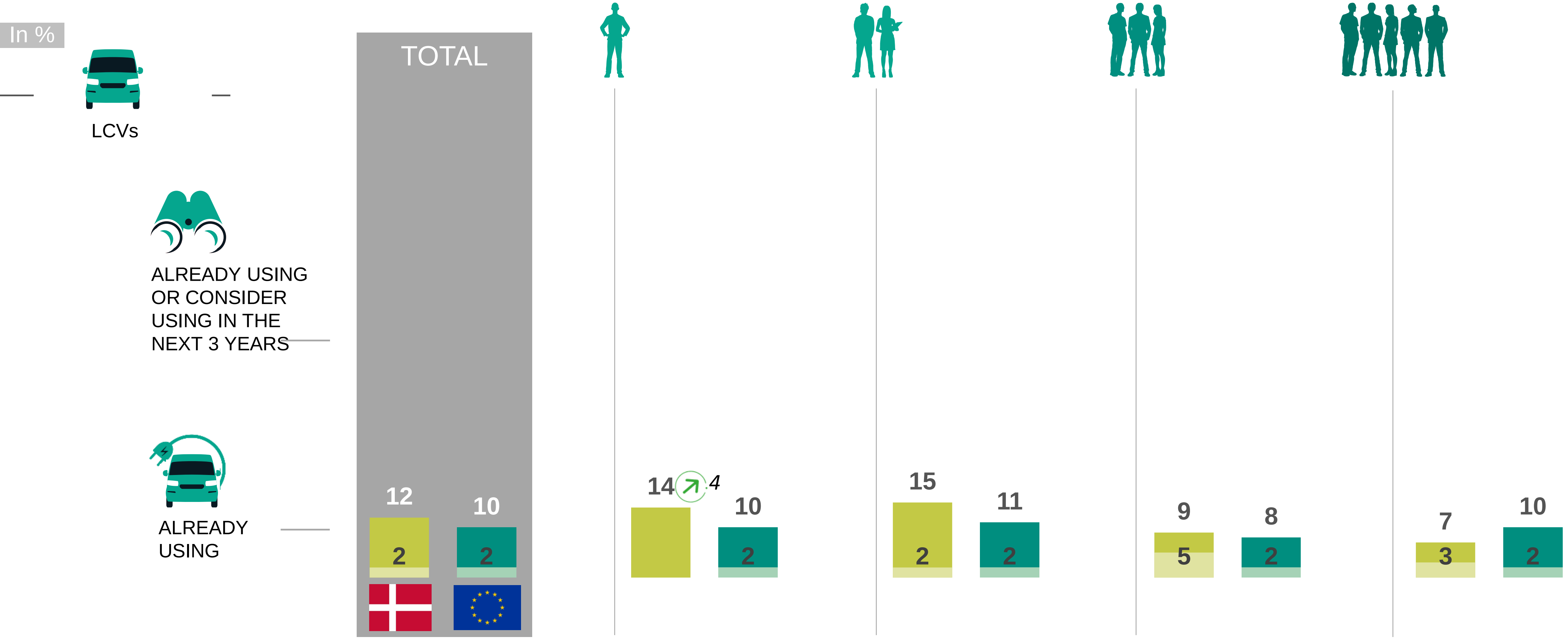
HYDROGEN FUEL CELL ELECTRIC VEHICLE : IMPLEMENTATION WITHIN COMPANY FLEET POLICY

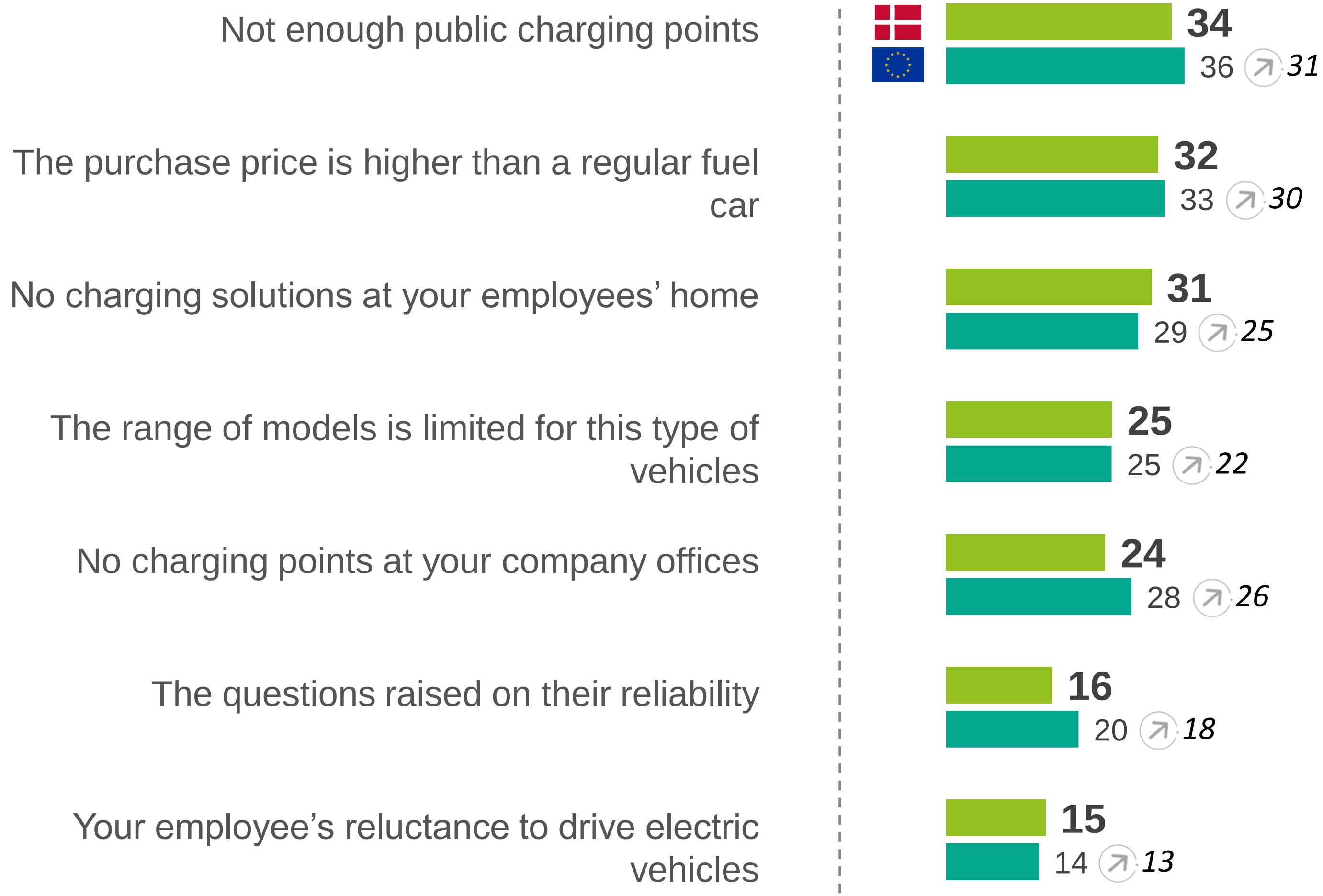


Amongst the following alternative fuel technologies, which ones do you currently use…?
Amongst the following alternative fuel technologies, which ones are you considering using…?
Basis: companies with LCVs

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

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CONSTRAINTS OF 100% BATTERY ELECTRIC VEHICLE USAGE

In %

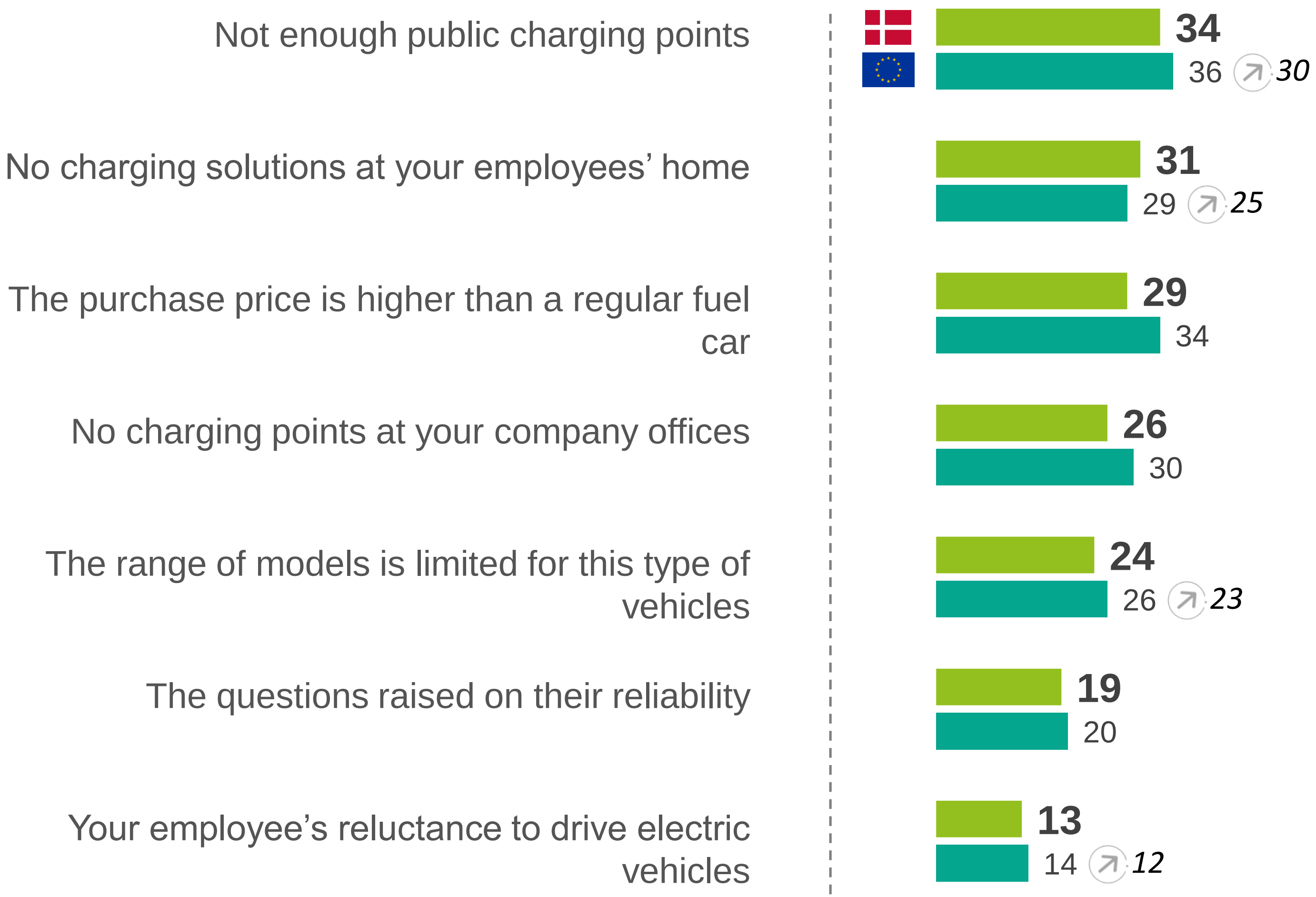
Passenger cars + LCVs

do not consider implementing battery electric vehicles

31

43

60



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

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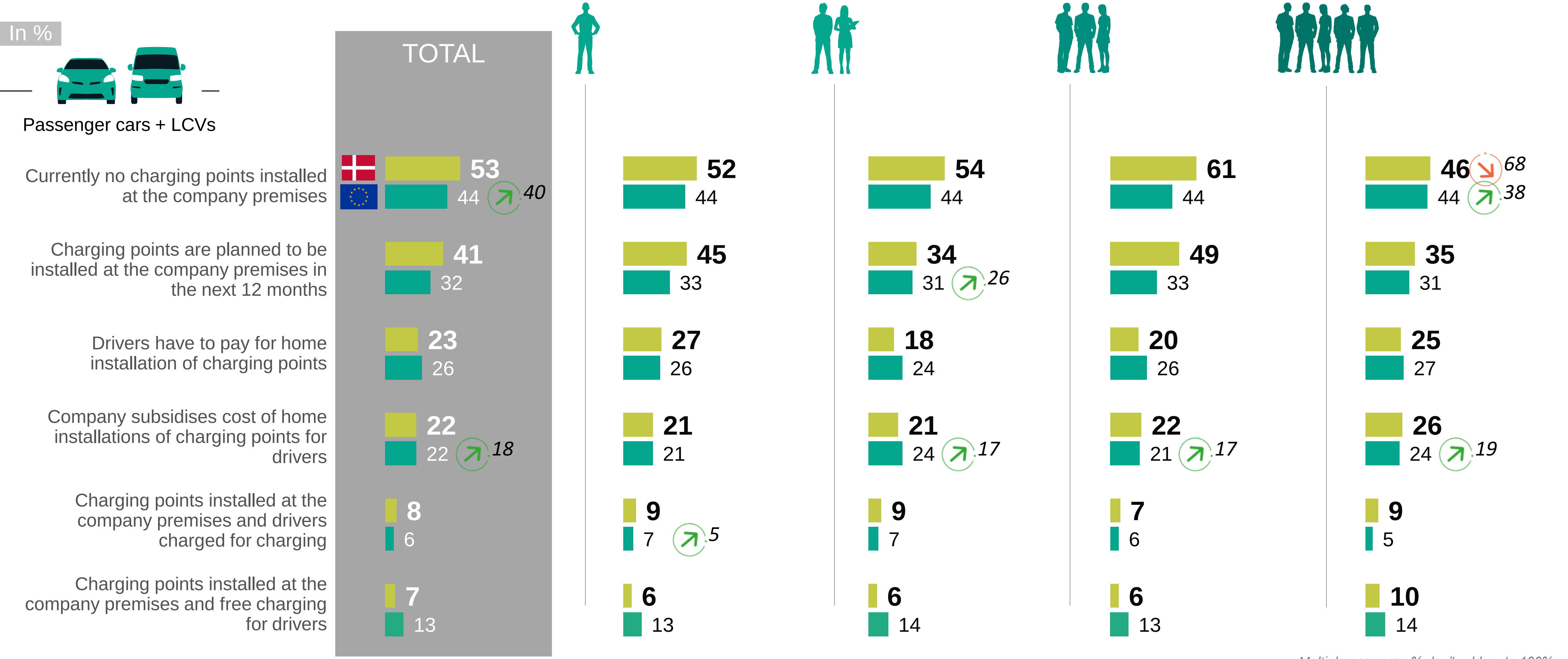
ACCESS TO CHARGING POINTS



Multiple answers - % don't add up to 100%
In terms of charging point installation and responsibility for the cost of charging for battery electric and plug-in hybrid vehicles in your company...?
Basis: companies already using or considering BEV/PHEV for passenger cars or BEV for LCV

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6

WHAT ARE THE PERSPECTIVES IN TERMS OF MOBILITY SOLUTIONS?

DANISH COMPANIES KEEP ADOPTING MOBILITY SOLUTIONS, STILL FAVOURING RIDE SHARING

1

Danish companies continue developing mobility solutions implementation in 2024, with a rising 81% already using at least one solution (vs 73% in 2023, also rising in Europe**), and 93% using or considering** them in the next 3 years (vs 83% in 2023).

Mobility solutions are **even more implemented among larger companies**: 84% to 92% adoption of at least one solution versus 73% to 77% in smaller businesses.

2

As in 2023, **ride sharing** shows the **highest potential** (37% already use or consider implementing over the next three years), especially by large companies. **Car or cash allowance** (30%), **private lease/salary sacrifice** (27%, rising from 16% in 2023) and **bike/two wheels sharing** (27%) follow.

Among **small companies, car or cash allowances** and short or mid-term **rentals** are also widespread, while **big businesses highly favour ride sharing**, and, to a lesser extent, **public transport**.

3

In continuity to 2023, these mobility solutions are seen as **complementary to existing systems**, and not as a substitute for all or part of the current fleets.

MOBILITY SOLUTIONS

TOP 3 USED SOLUTIONS

#1	Ride sharing: where several employees travel in the same car to the same destination	29%	18%
#2	Private lease/Salary sacrifice	19% ↗ 12	15%
#3	Car or cash allowance	19%	17%

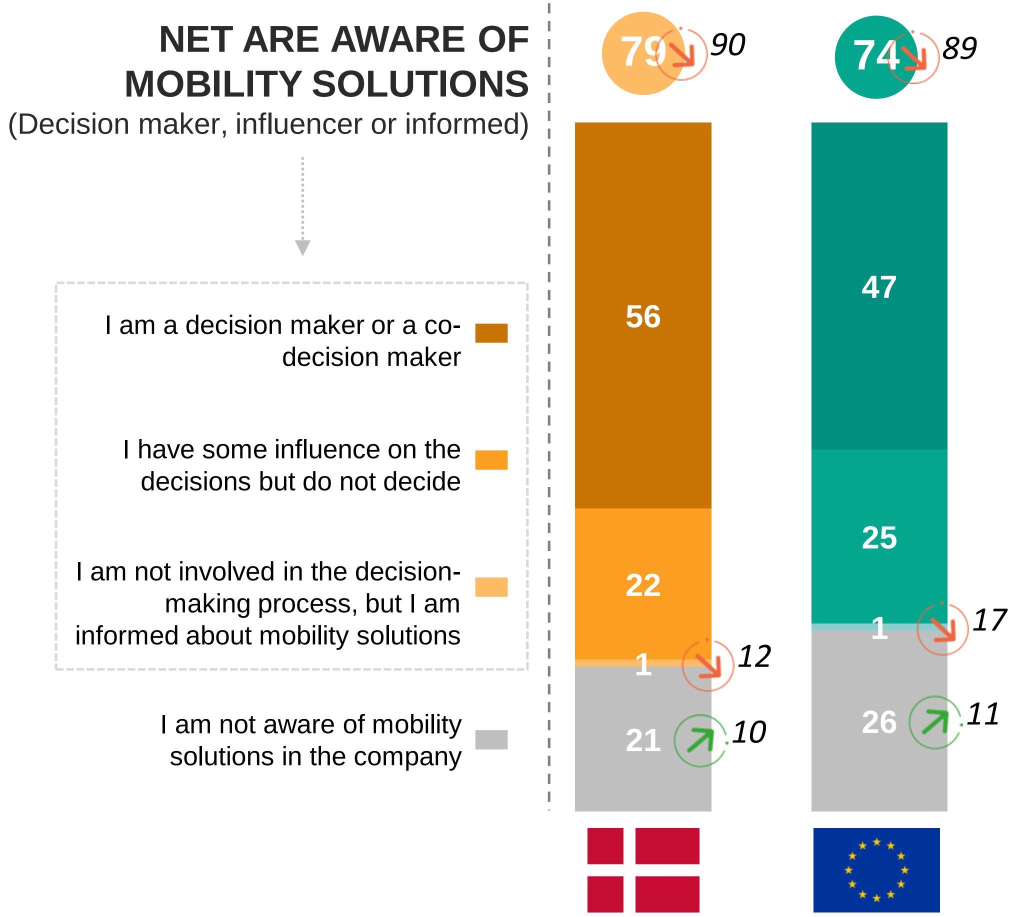
TOP 3 POTENTIAL NEXT 3 YEARS

2027

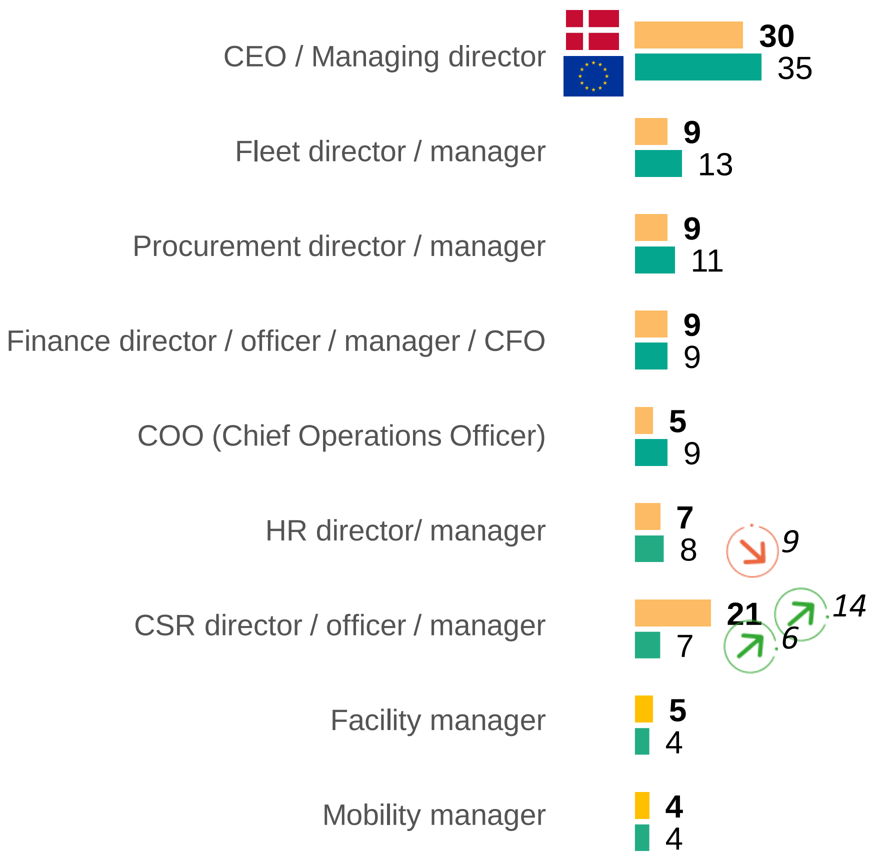
#1	Ride sharing: where several employees travel in the same car to the same destination	37%	28%
#2	Car or cash allowance	30%	27%
#3	Private lease/Salary sacrifice	27% ↗ 16	25%

MOBILITY SOLUTION DECISION MAKERS

RESPONDENTS INVOLVEMENT IN MOBILITY SOLUTION DECISIONS



POSITION OF THE PERSON WHO DECIDES ON MOBILITY SOLUTIONS



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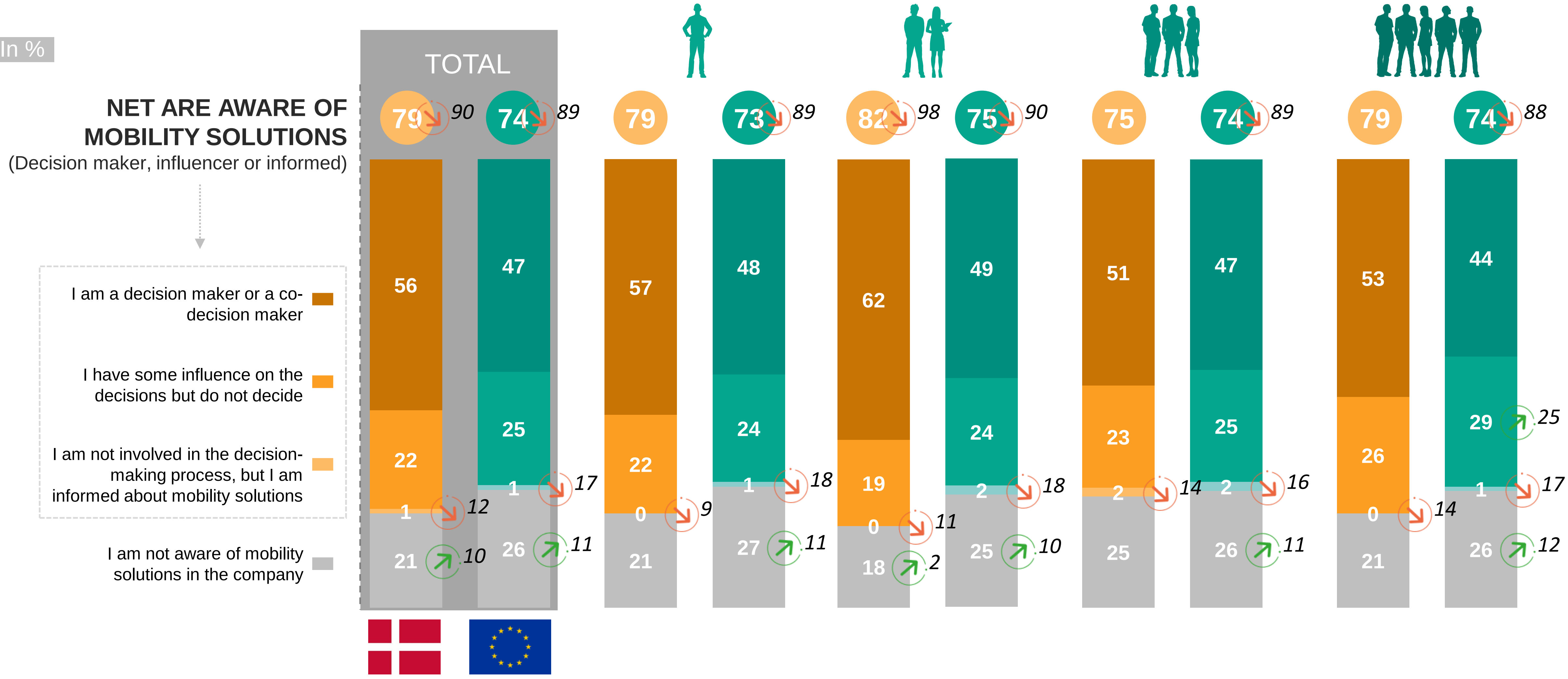
To what extent are you informed about mobility solutions using other modes of transportation than company cars (such as car sharing , bike sharing etc….)
What is the position of the person who decides on mobility solutions in your company??
Basis: companies with corporate vehicles = 100%

RESPONDENTS INVOLVEMENT IN MOBILITY SOLUTION DECISIONS

In %



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

POSITION OF THE PERSON WHO DECIDES ON MOBILITY SOLUTIONS

In %

	TOTAL (DK)	TOTAL (EU)	(DK)	(EU)	(DK)	(EU)	(DK)	(EU)	(DK)	(EU)
CEO / Managing director	30	35	35	36	26	35	24	34	32	34
Fleet director / manager	9	13	11	14	12	12	10	11	3 ↘ 15	13
Procurement director / manager	9	11	8	11	7	10	13	13 ↗ 11	5	11
Finance director / officer / manager / CFO	9	9	13	8	5	8	8	9	9	10
COO (Chief Operations Officer)	5	9	2	9	11	9	6	8	5	10
HR director/ manager	7	8 ↘ 9	7	7 ↘ 9	8	9	6	9	7	7
CSR director / officer / manager	21 ↗ 14	7 ↗ 6	16	7	23	6	25	7 ↗ 5	23	7
Facility manager	5	4	7	4	4	4	3	4	7	4
Mobility manager	4	4	2	4	3	4	6	3	4	3

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What is the position of the person who decides on mobility solutions in your company??
Basis: companies with corporate vehicles = 100%

MOBILITY SOLUTIONS LIST AND DEFINITIONS

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

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

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

PUBLIC TRANSPORT

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

AN APP PROVIDED BY THE COMPANY TO BOOK MOBILITY SOLUTIONS

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

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

CAR OR CASH ALLOWANCE

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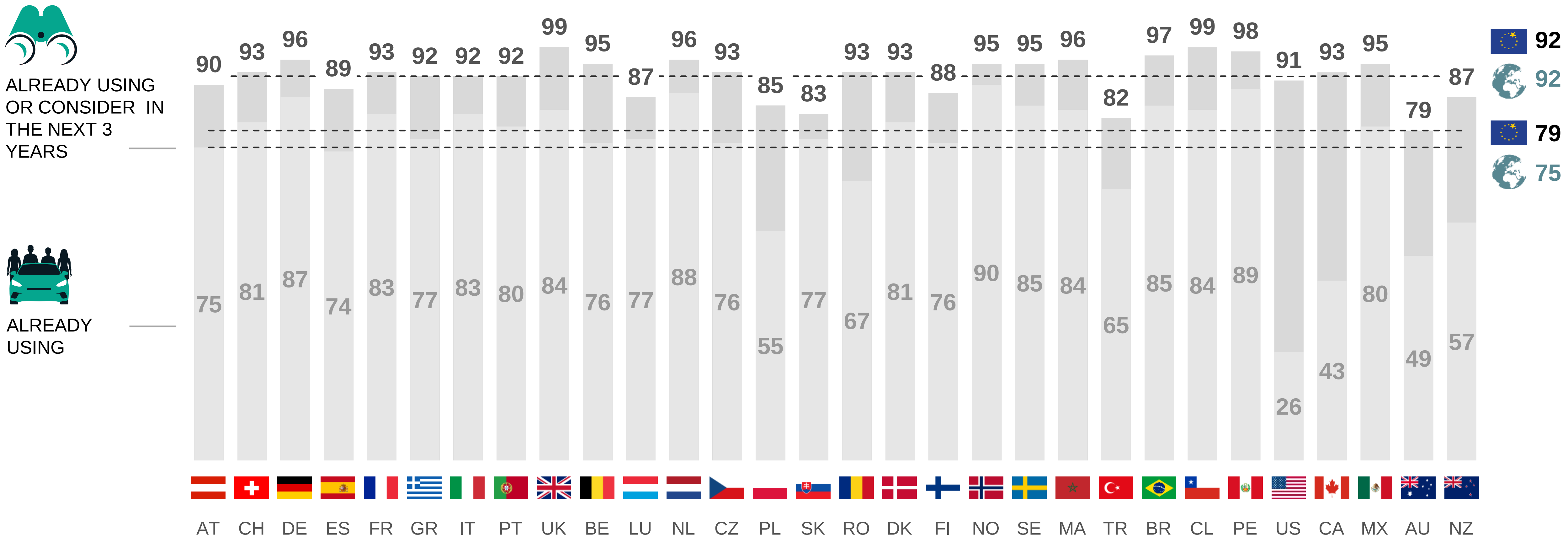
MOBILITY SOLUTIONS IMPLEMENTATION

At least one already implemented

List of the alternative mobility solutions:

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

In %

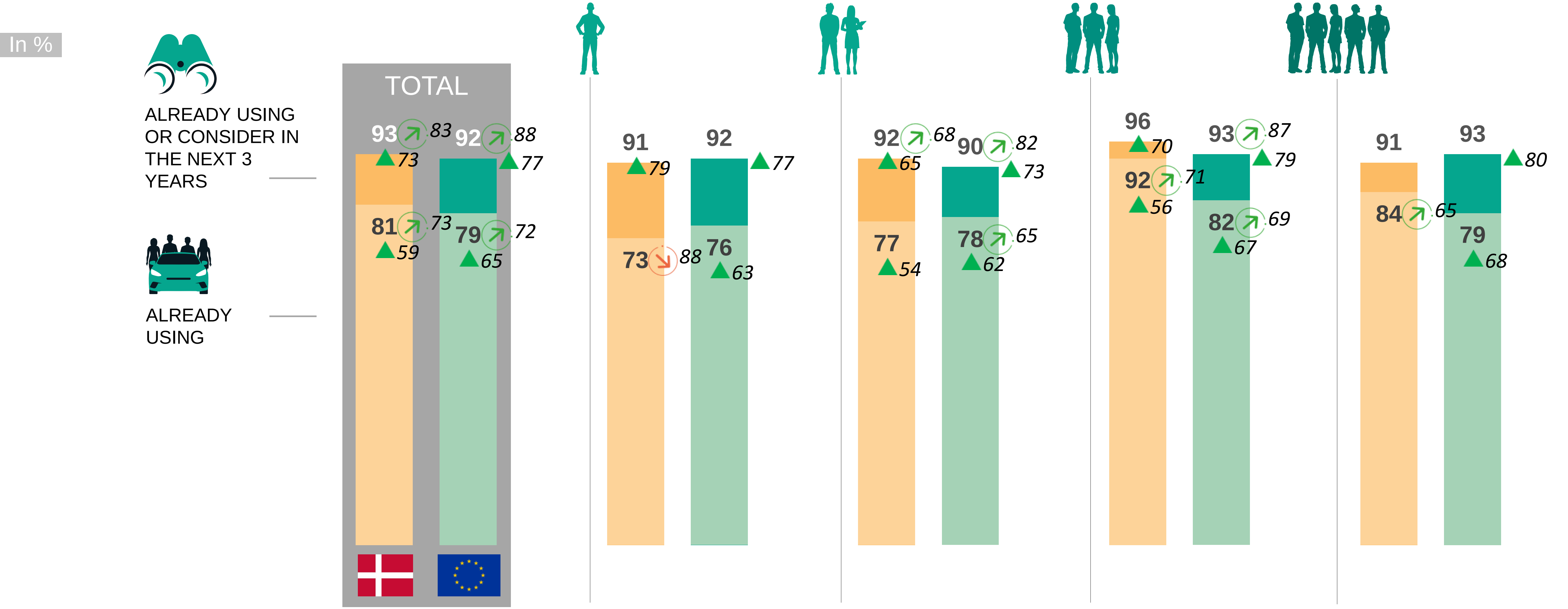


Which of the following have you implemented, or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%

Question asked to respondents that are aware of mobility solutions

MOBILITY SOLUTIONS IMPLEMENTATION

At least one already implemented



XX Significantly higher than 2023 year

XX Significantly higher than 2022 year

XX = score 2023 or 2022

XX Significantly lower than 2023 year

XX Significantly lower than 2022 year

XX = score 2023 or 2022

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

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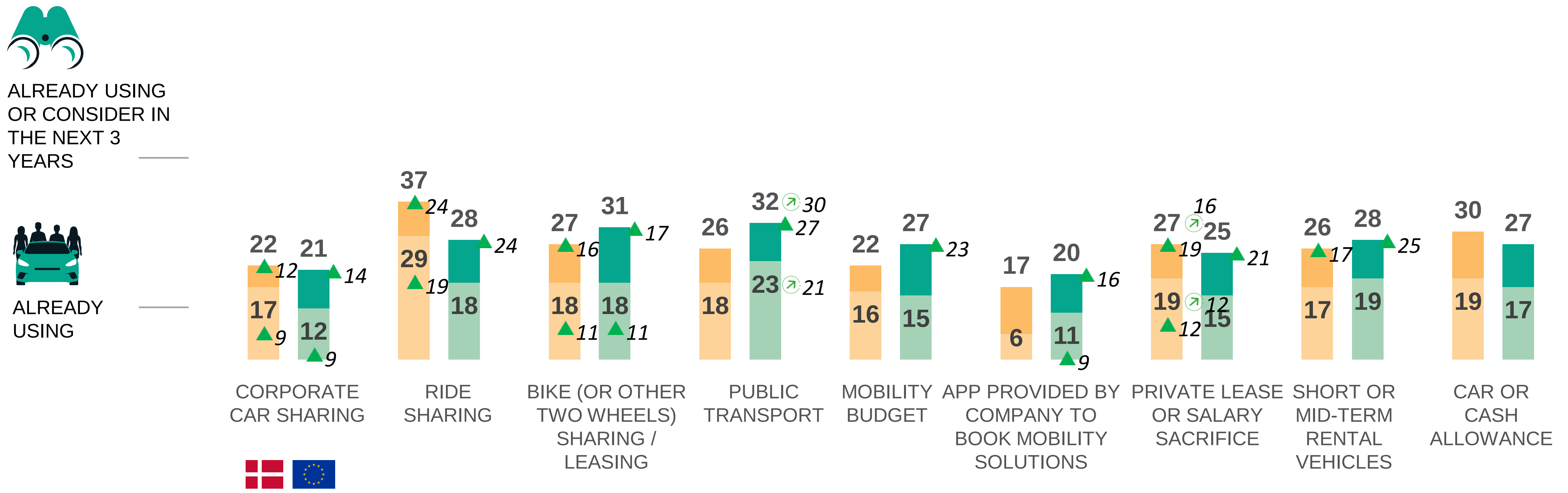
OVERVIEW OF MOBILITY SOLUTIONS IMPLEMENTATION

In %

81% 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%

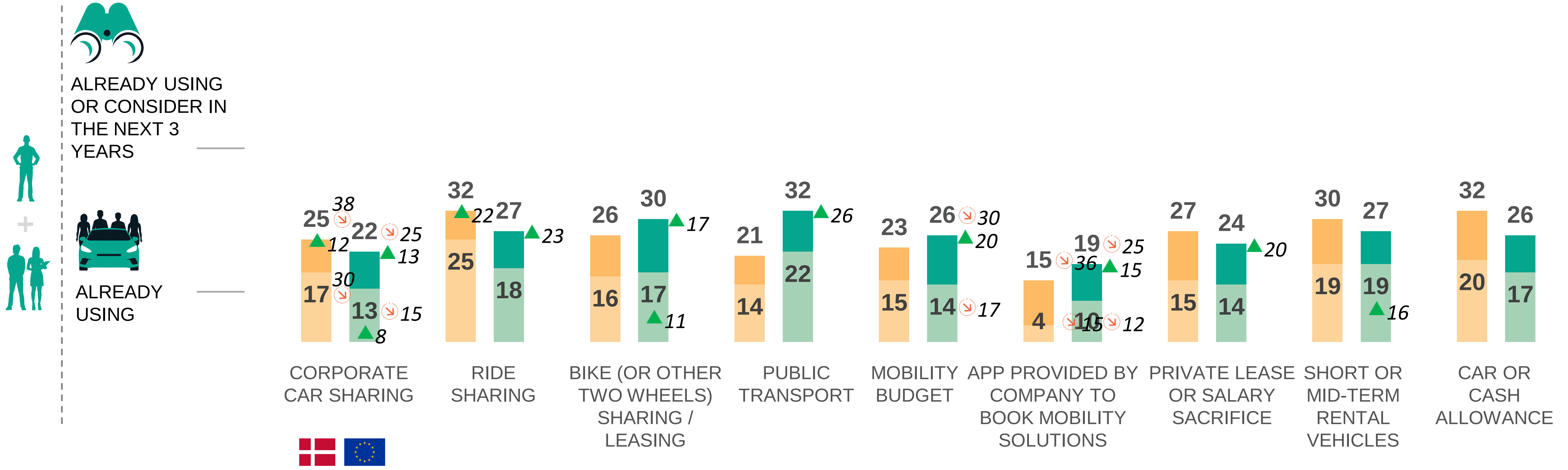
Question asked to respondents that are aware of mobility solutions

OVERVIEW OF MOBILITY SOLUTIONS IMPLEMENTATION

Focus on 1 to 99

In %

74% Of companies have already implemented at least one of these solutions



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

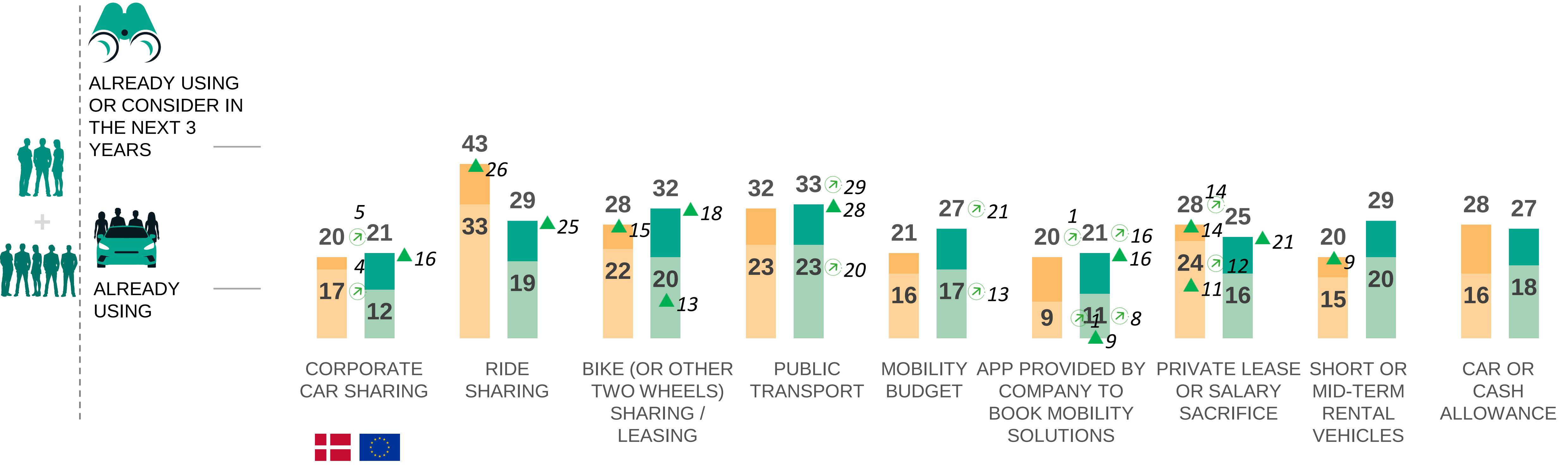
Question asked to respondents that are aware of mobility solutions

OVERVIEW OF MOBILITY SOLUTIONS IMPLEMENTATION

Focus on 100 and more

In %

89% Of companies have already implemented at least one of these solutions

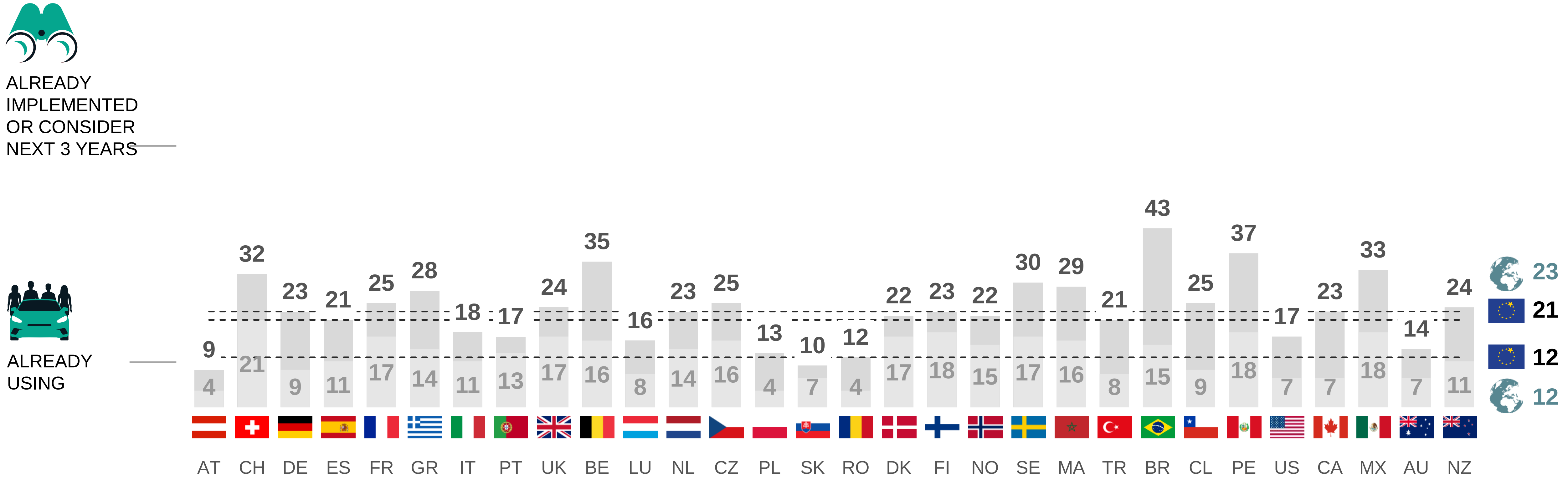


Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%

Question asked to respondents that are aware of mobility solutions

CORPORATE CAR SHARING IMPLEMENTATION

In %



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

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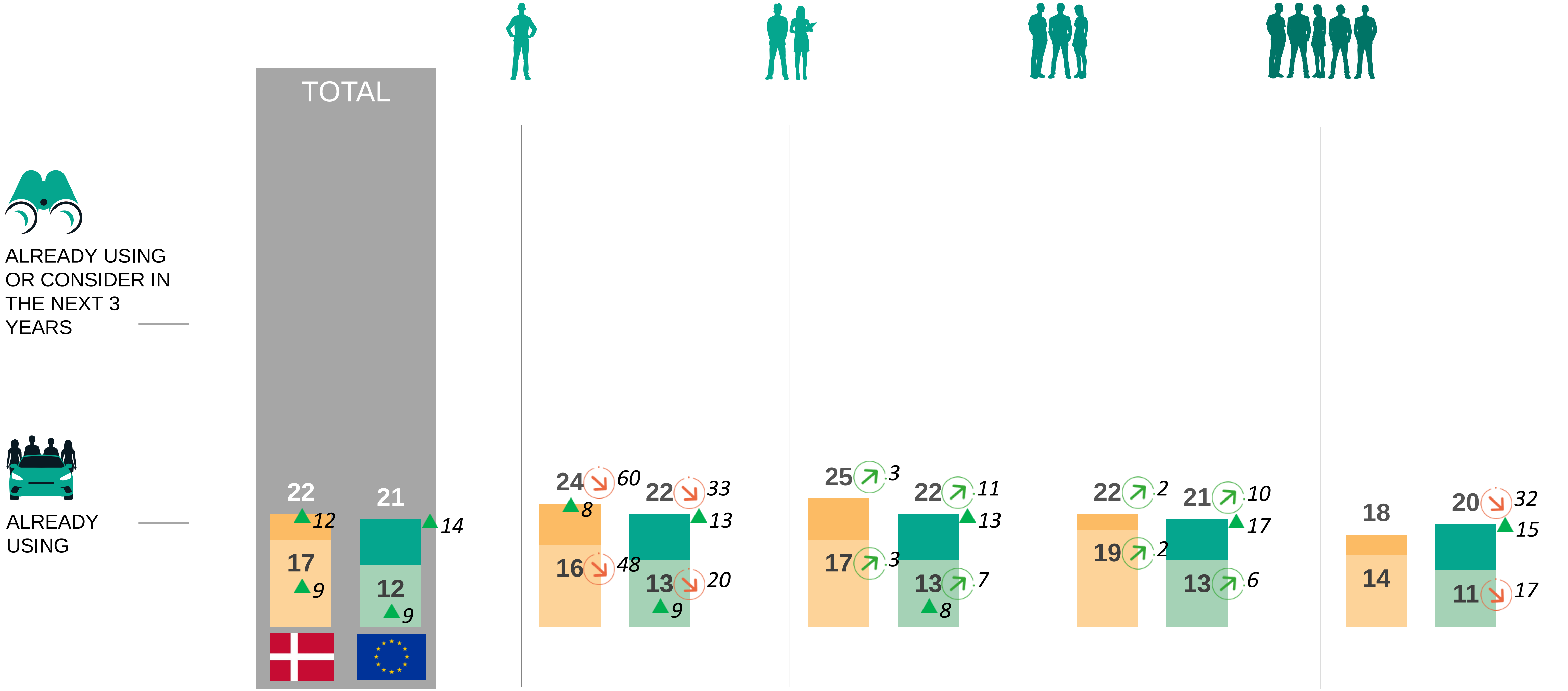
CORPORATE CAR SHARING IMPLEMENTATION

In %



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

Question asked to respondents that are aware of mobility solutions

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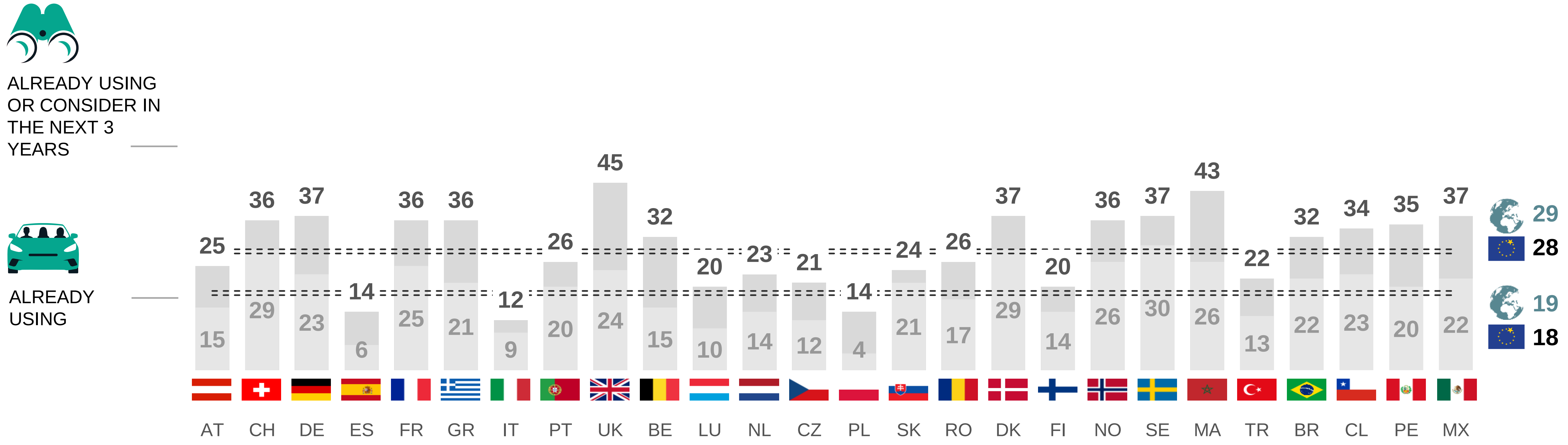
RIDE SHARING IMPLEMENTATION

In %

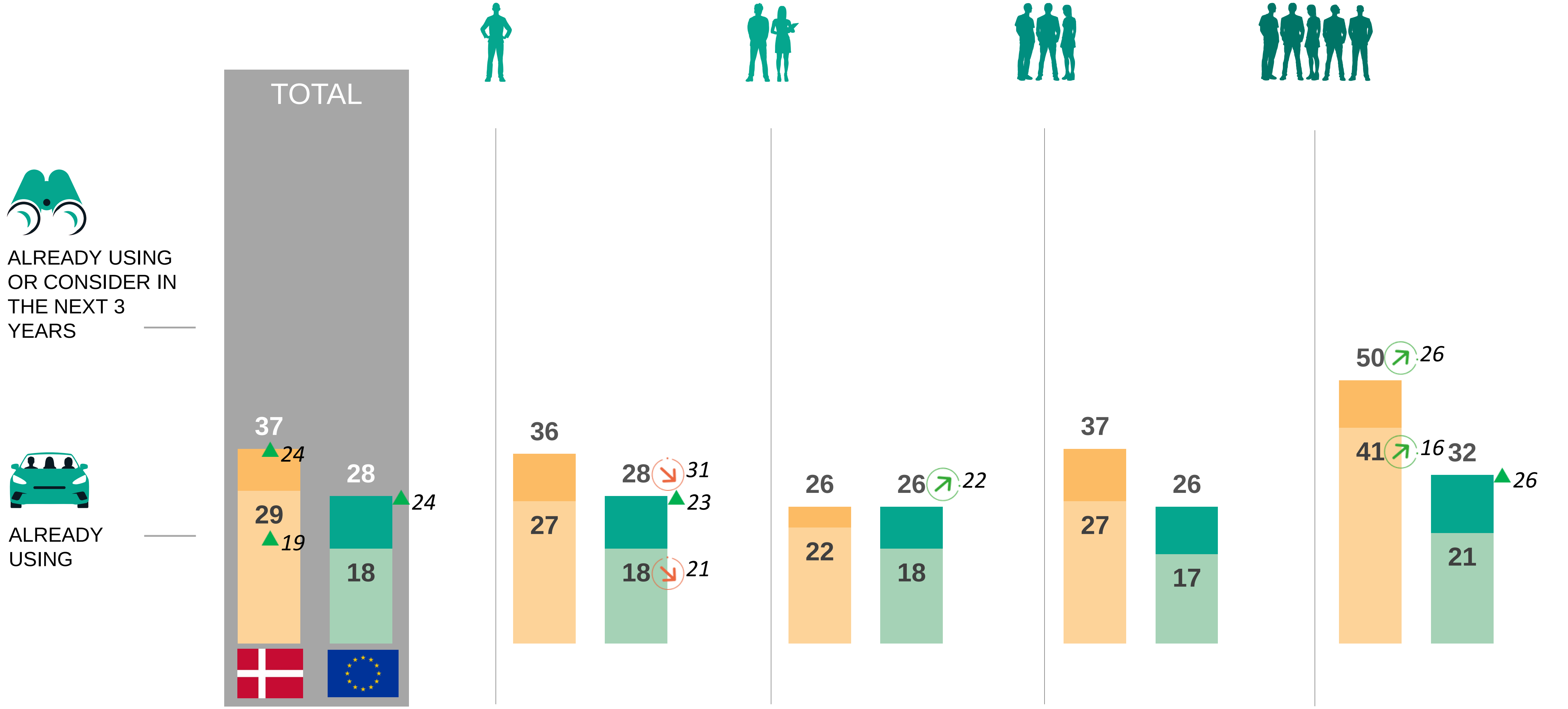


Which of the following have you implemented or will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%

Question asked to respondents that are aware of mobility solutions

RIDE SHARING IMPLEMENTATION

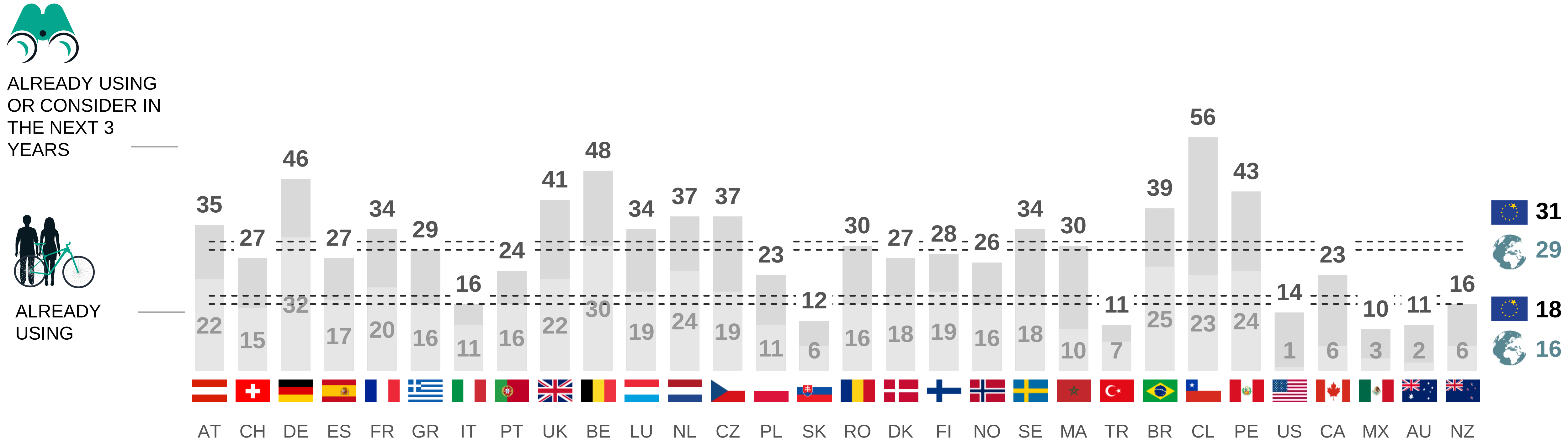
In %



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

BIKE (OR OTHER TWO WHEELS) SHARING / LEASING IMPLEMENTATION

In %



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

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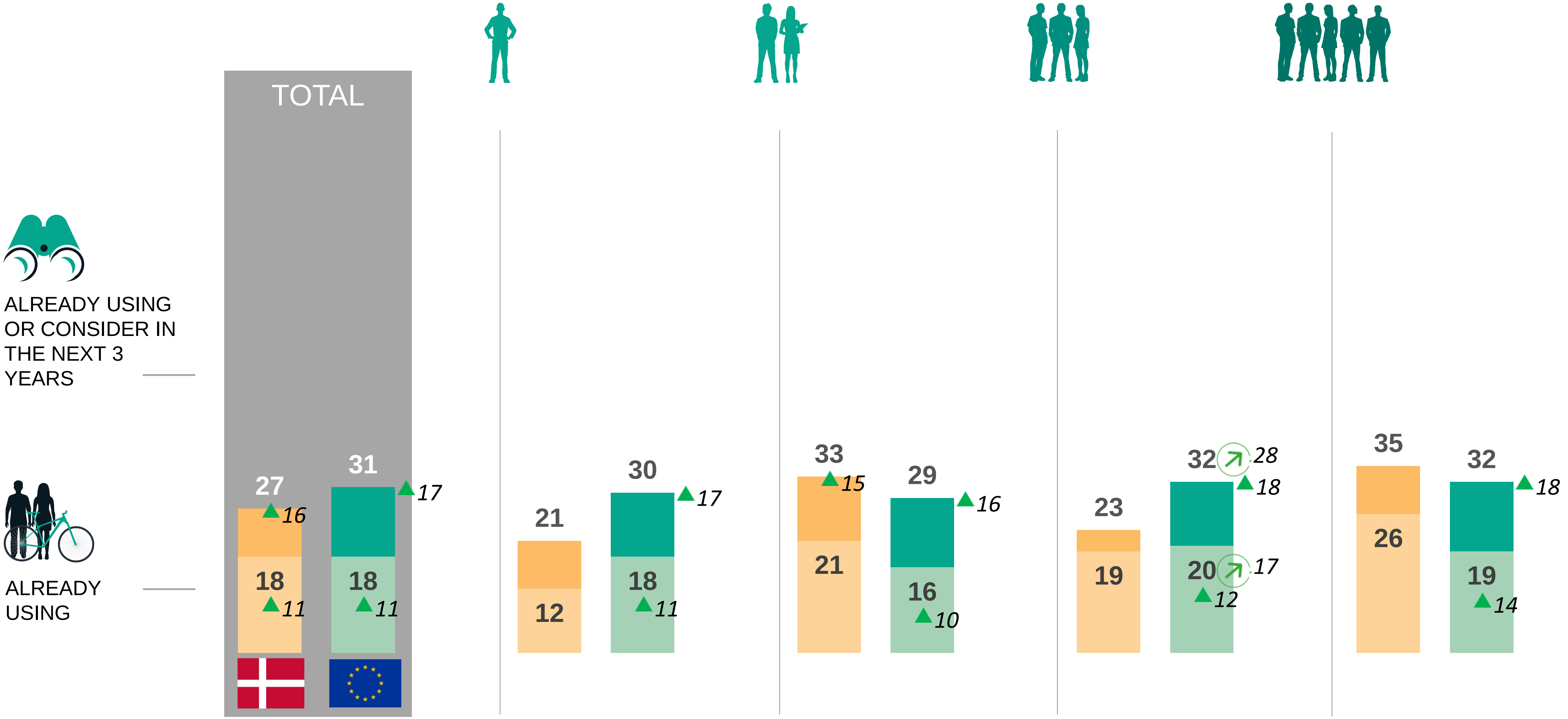
BIKE (OR OTHER TWO WHEELS) SHARING / LEASING IMPLEMENTATION

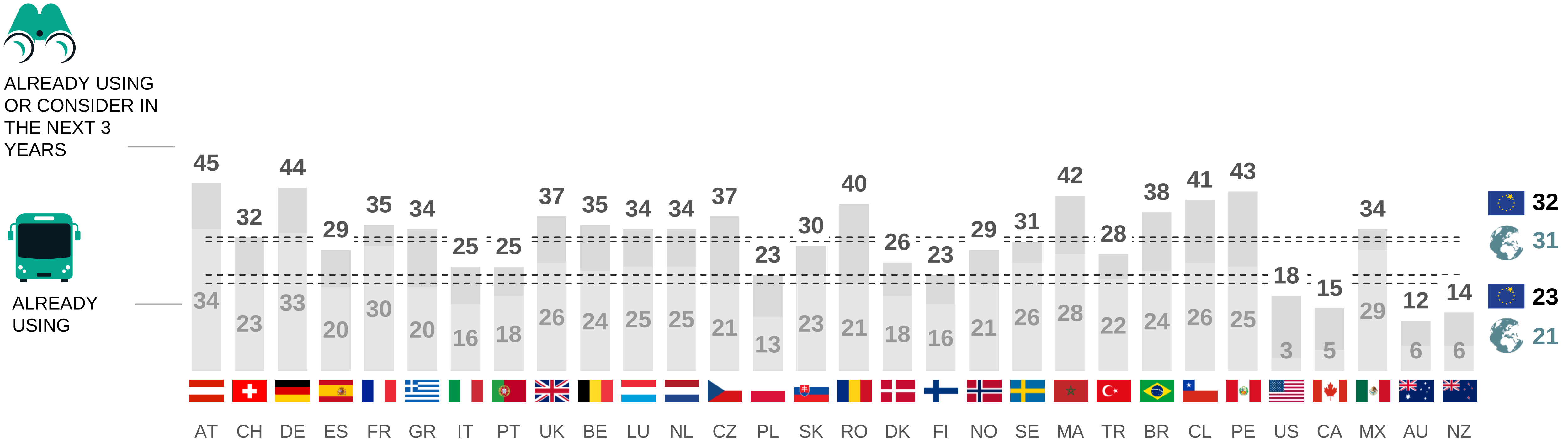
In %



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

PUBLIC TRANSPORT IMPLEMENTATION

In %



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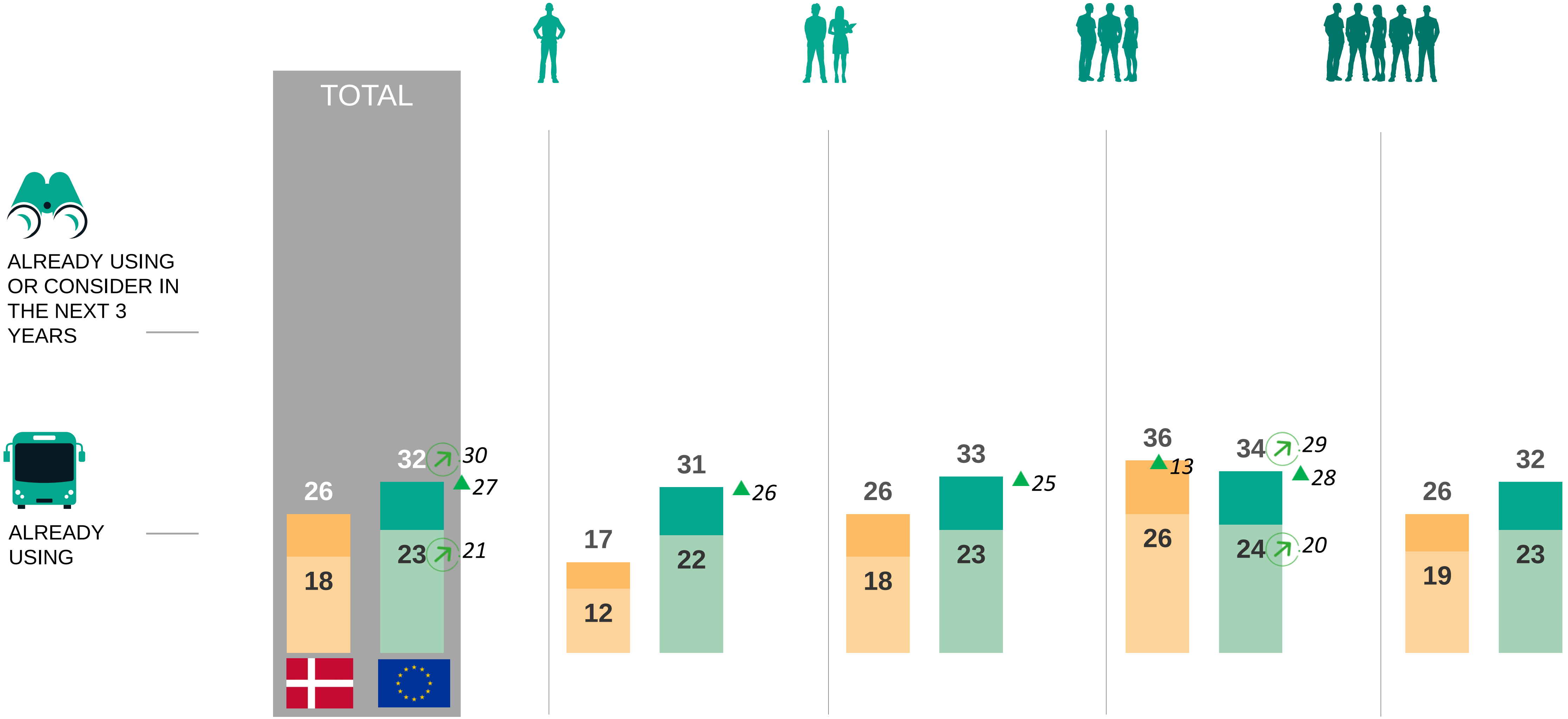
PUBLIC TRANSPORT IMPLEMENTATION

In %



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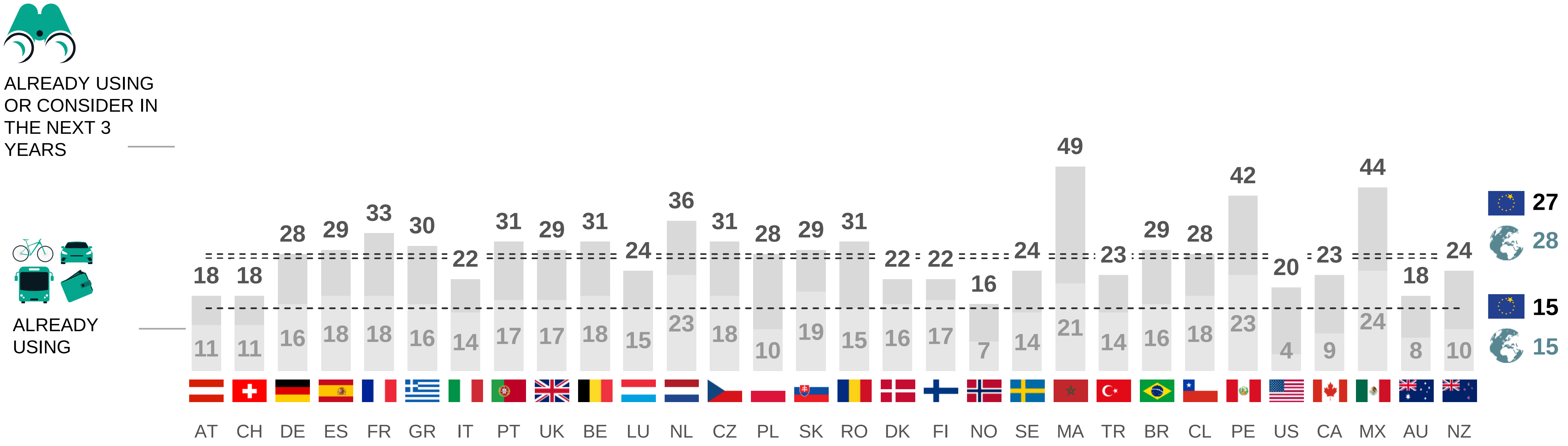
Question asked to respondents that are aware of mobility solutions

MOBILITY BUDGET IMPLEMENTATION

In %



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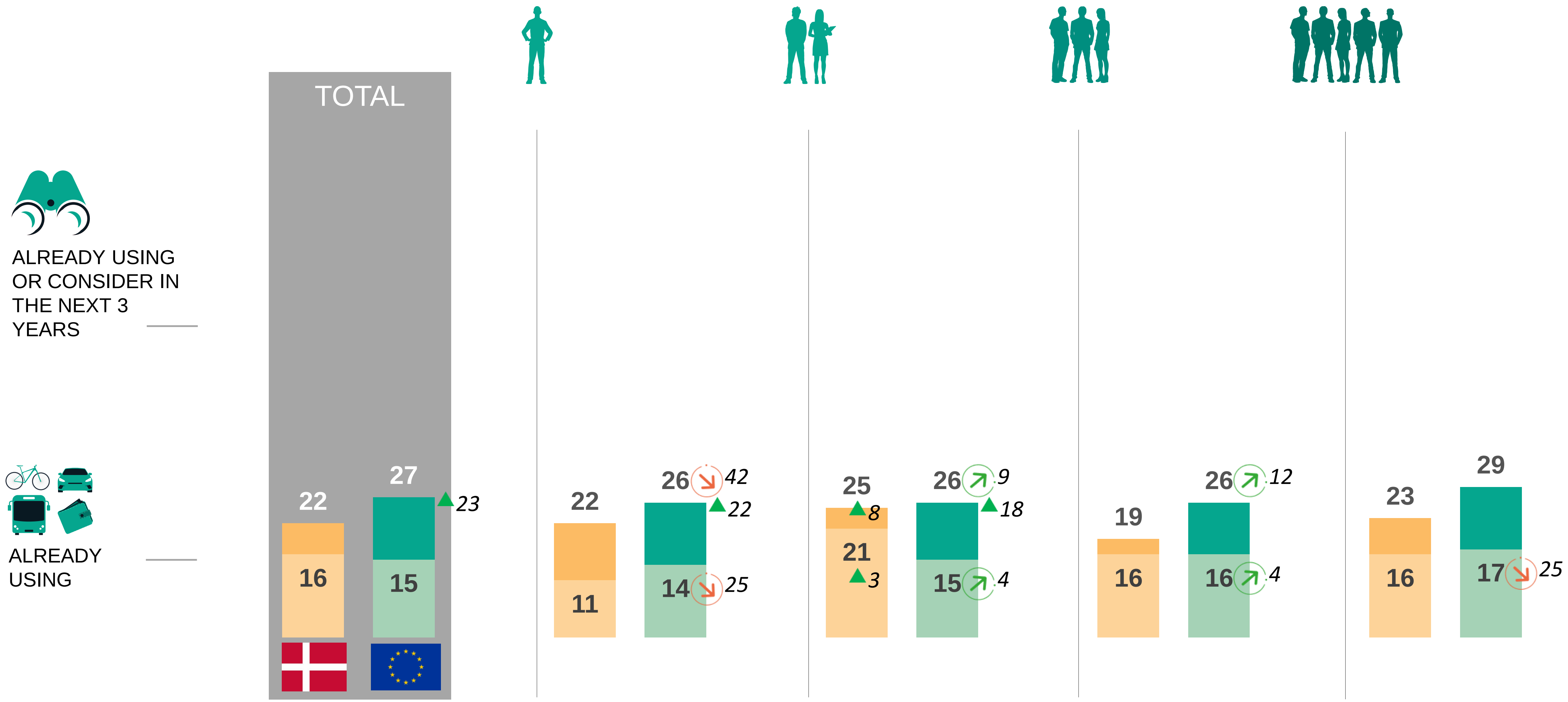
MOBILITY BUDGET IMPLEMENTATION

In %



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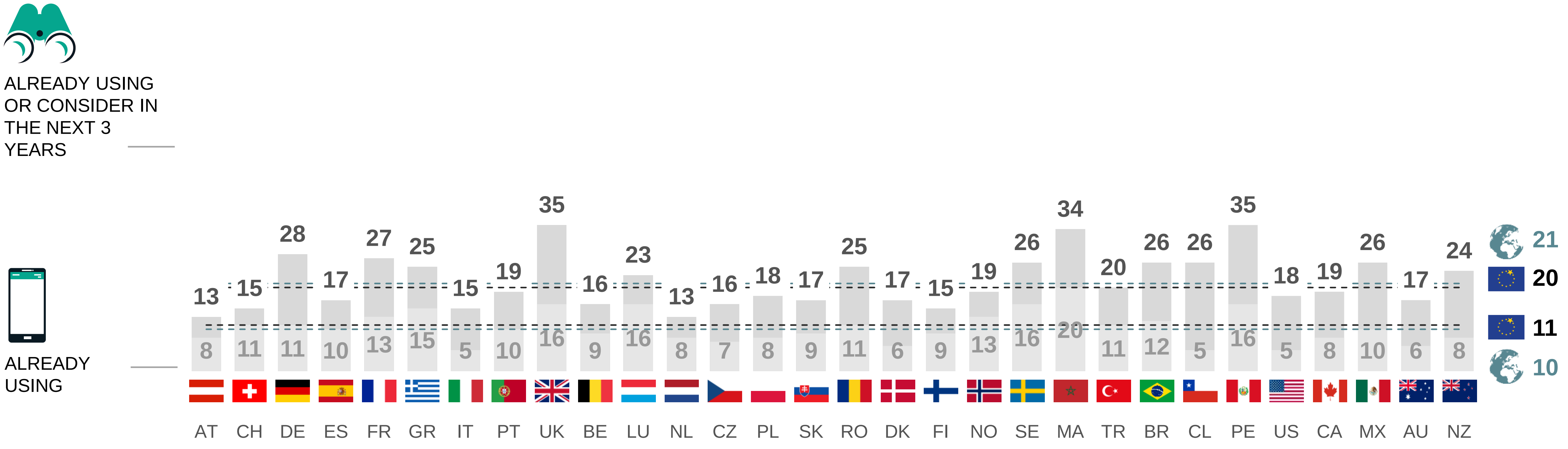
Question asked to respondents that are aware of mobility solutions

AN APP PROVIDED BY THE COMPANY TO BOOK MOBILITY SOLUTIONS

In %



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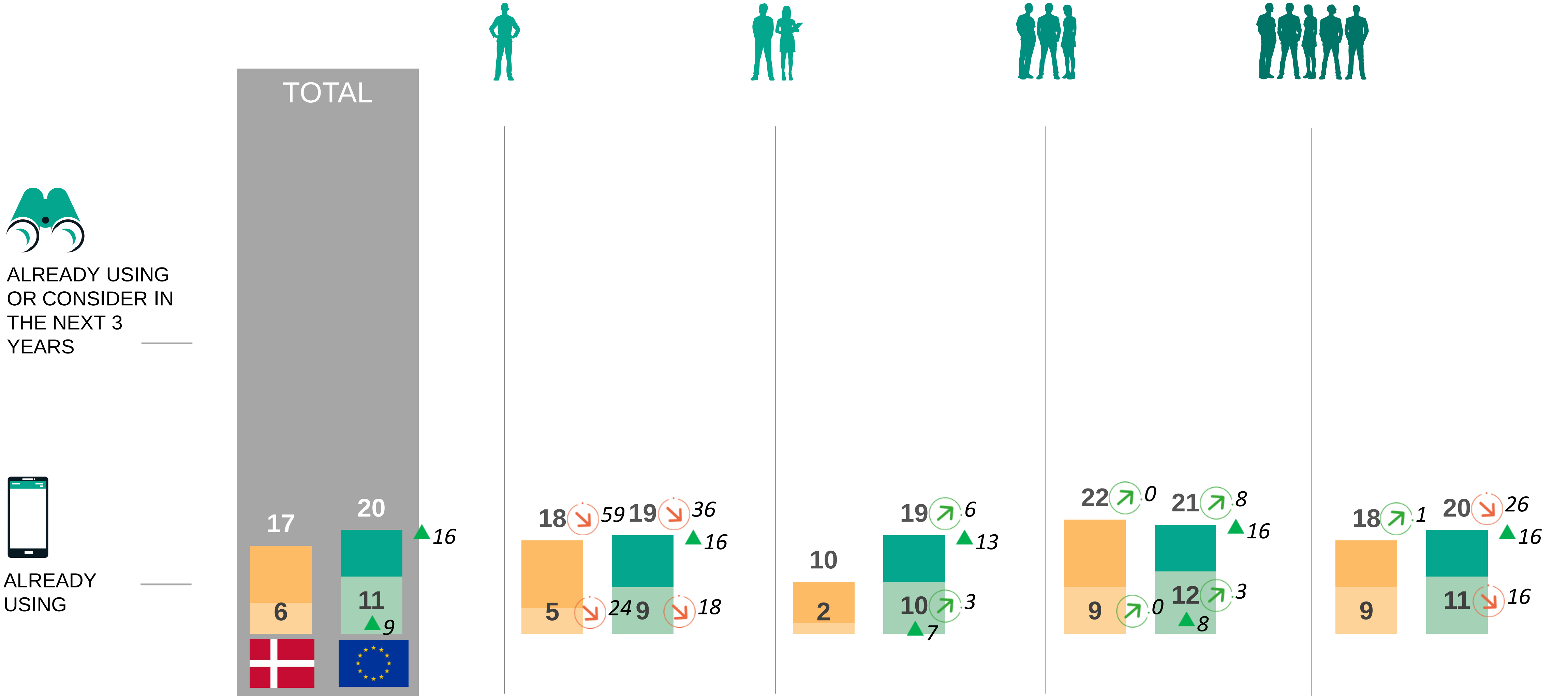

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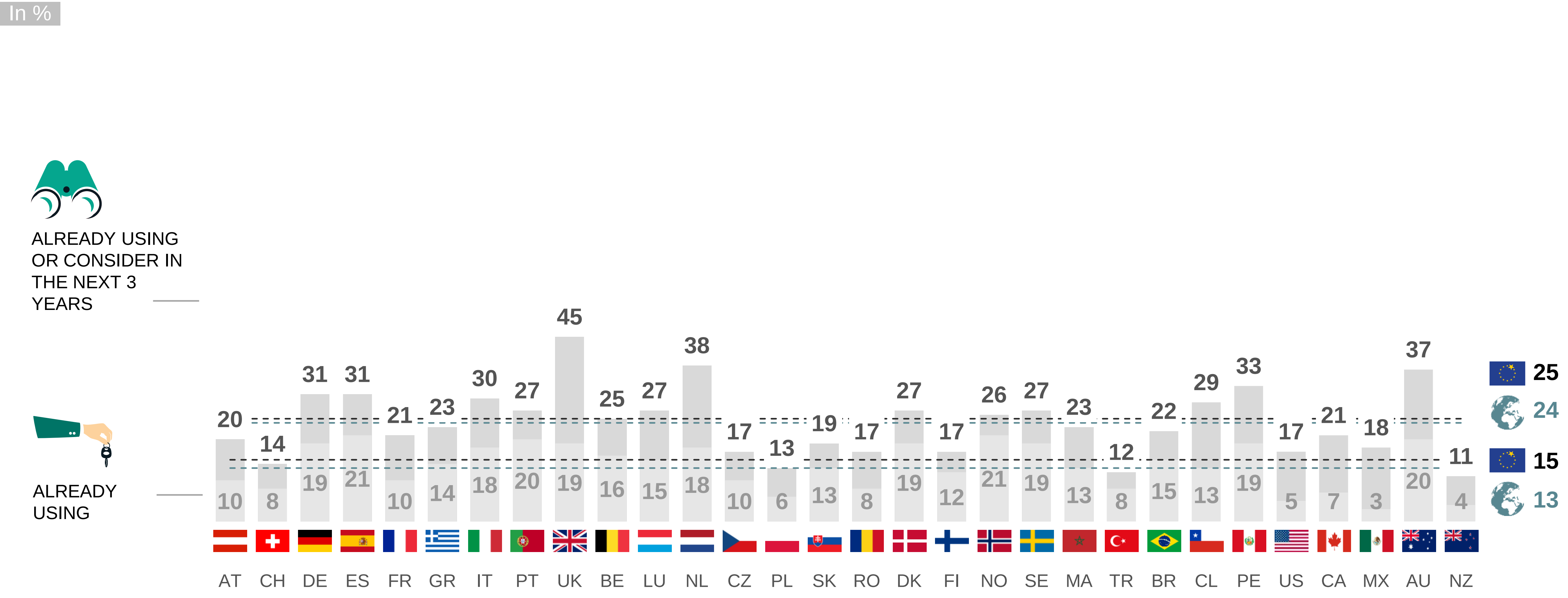
PRIVATE LEASE OR SALARY SACRIFICE IMPLEMENTATION



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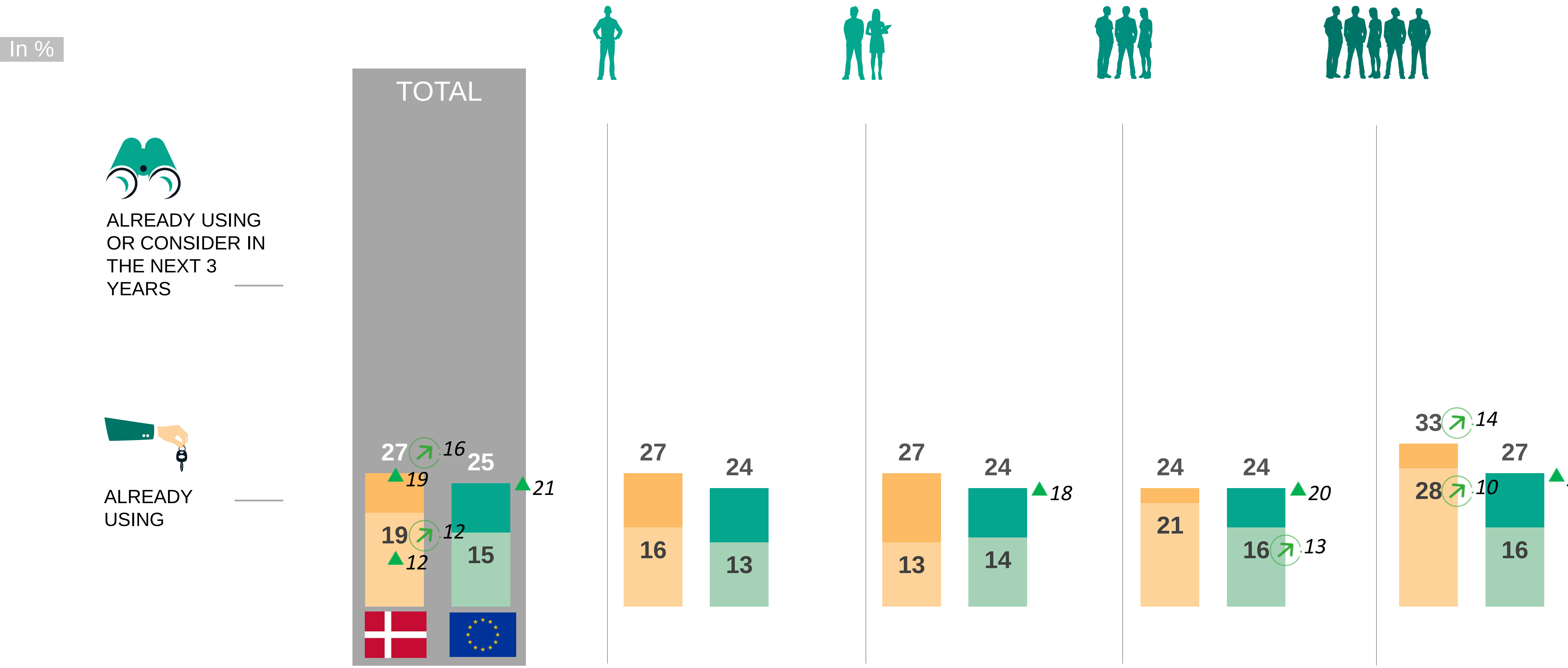

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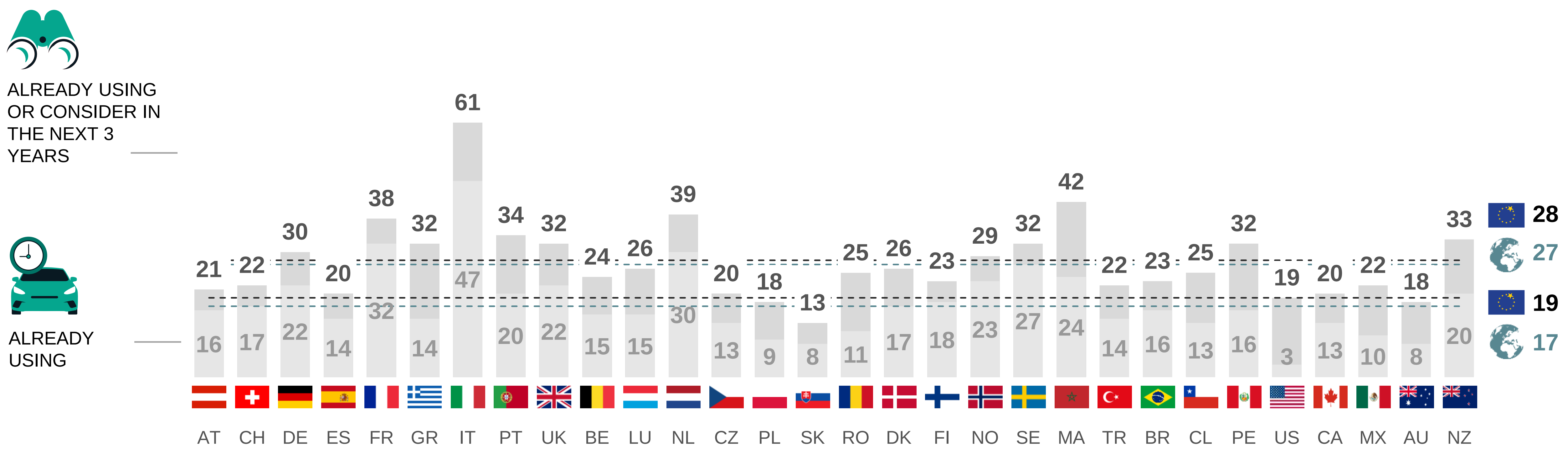
Question asked to respondents that are aware of mobility solutions

SHORT OR MID-TERM RENTAL VEHICLES IMPLEMENTATION

In %



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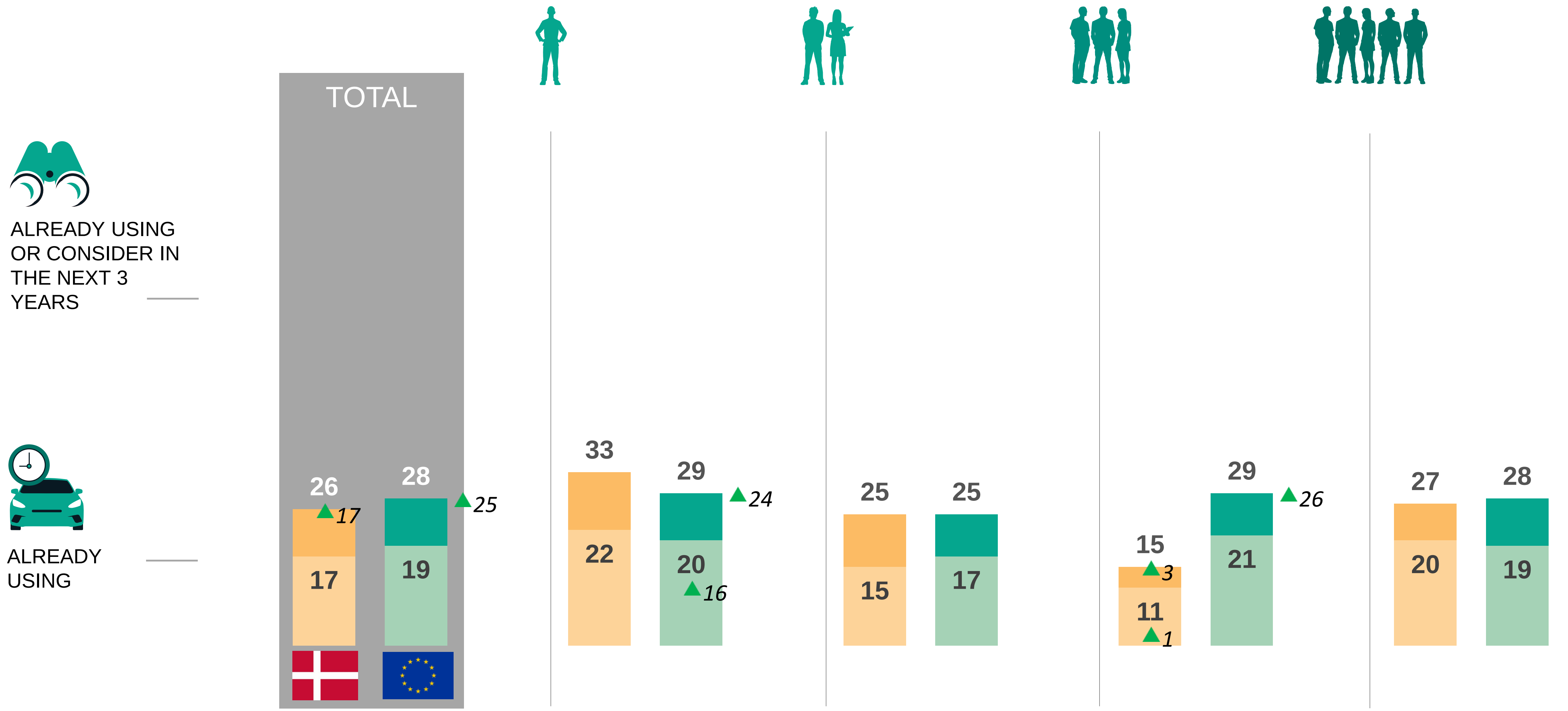
Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions

SHORT OR MID-TERM RENTAL VEHICLES IMPLEMENTATION

In %



Which of the following have you implemented or will you implement in the next 3 years?
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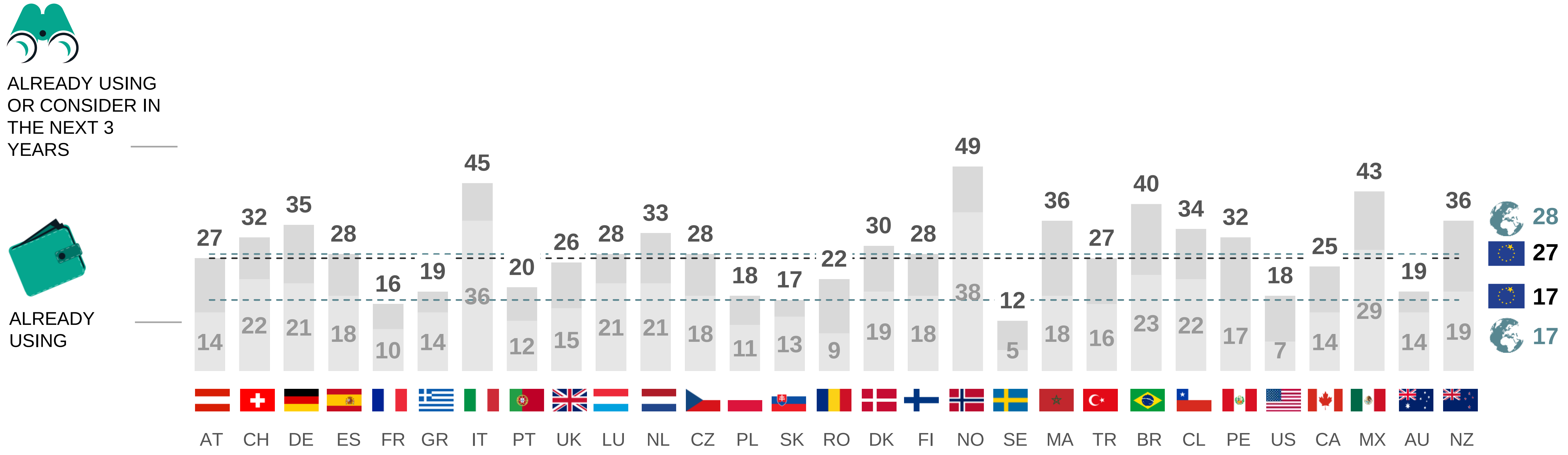
Basis: companies with corporate vehicles = 100%
Question asked to respondents that are aware of mobility solutions

CAR OR CASH ALLOWANCE IMPLEMENTATION

In %



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

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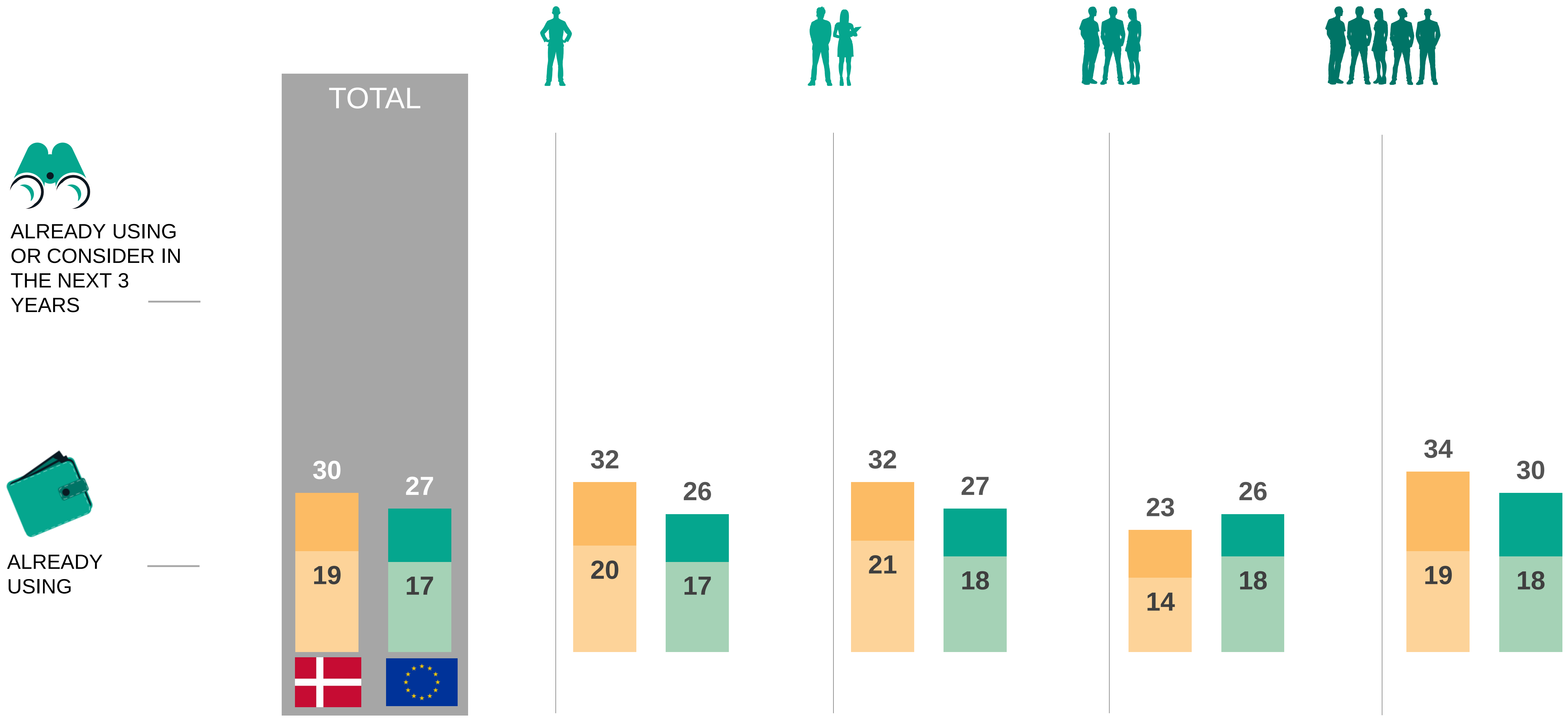
In %



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Question asked to respondents that are aware of mobility solutions

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REASONS FOR IMPLEMENTING OR CONSIDERING MOBILITY SOLUTIONS

In %

	TOTAL				
For reasons related to CSR (company social responsibility) policies	39 ↗ 29 / 40 ↗ 34	31 / 38 ↗ 33	42 / 43 ↗ 33	54 ↗ 33 / 39	31 / 39
Because of HR related needs like talent recruitment, retaining employees etc.	40 ↗ 24 / 40 ↗ 29	36 / 39 ↗ 30	46 / 40 ↗ 33	47 ↗ 21 / 39 ↗ 25	34 / 41 ↗ 27
To improve employer branding / company attractiveness for employees	38 / 35 ↗ 30	44 / 35 ↗ 29	32 / 37 ↗ 30	34 / 34	37 / 34
To anticipate upcoming regulations	25 / 30 ↗ 24	26 / 31 ↗ 23	22 / 30 ↗ 24	25 / 31 ↗ 24	23 / 29
Because of tax incentives	32 ↗ 21 / 28 ↗ 21	34 / 30 ↗ 20	33 / 26 ↗ 20	23 / 27 ↗ 21	41 / 27 ↗ 21
To answer specific requests of some employees	35 / 26 ↗ 24	37 / 27	44 / 26	34 / 27	24 / 24

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

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

Certainly

In %

	TOTAL		
Ride Sharing	**17**	**9**	**23**
	11	11	11
Car sharing	**14**	**16**	*Low basis*
	11	10	11
A short or mid term rental vehicle to provide transport for an employee	**13**	**8**	*Low basis*
	13 ↗ 10	12	14 ↗ 10
Car or cash allowance	**11**	**7**	**16**
	13	12	14
Private lease/Salary sacrifice	**7**	**6**	*Low basis*
	11	11	12
Mobility budget	**2**	**3**	
	8	9	8

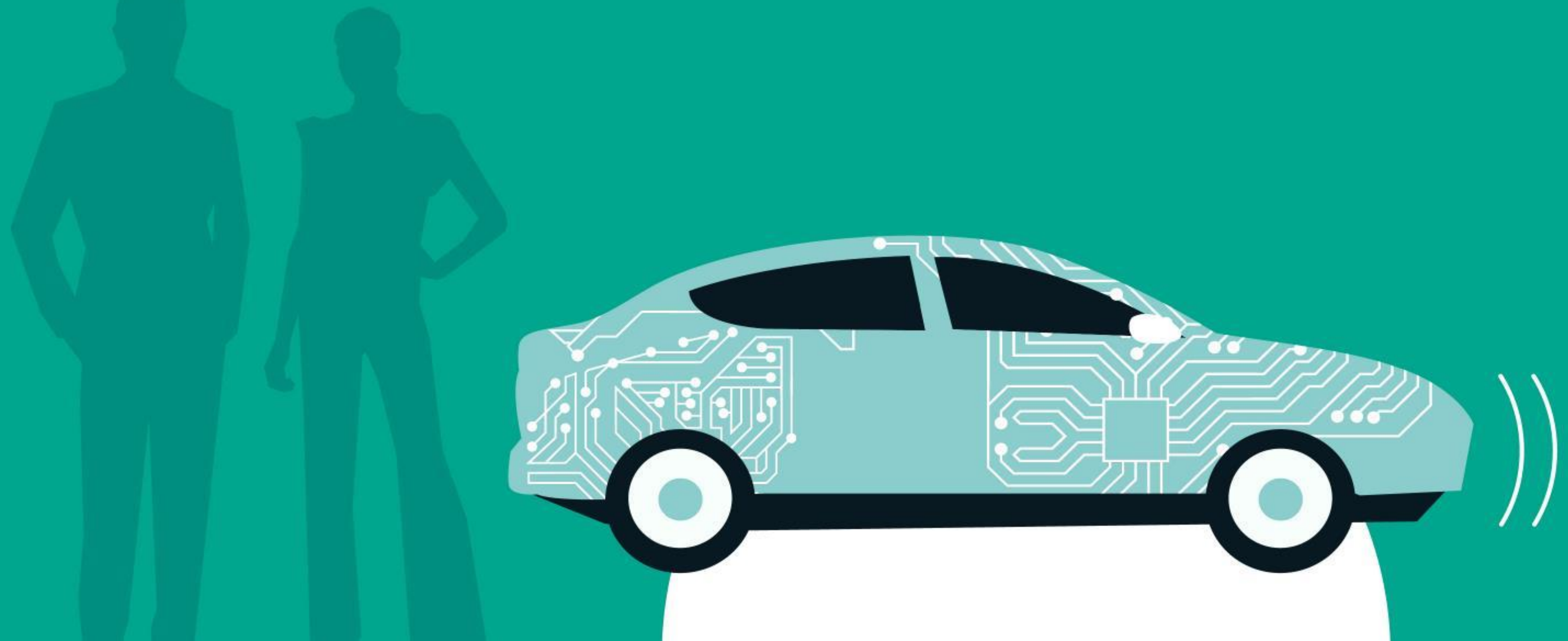
Would you anticipate that your company would give up all or part of the company car fleet for such alternatives?

Basis: companies using or considering at least one mobility solution

Question asked to respondents that are aware of mobility solutions

7

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



INTEREST IN TELEMATICS IS QUITE HIGH, BUT THE TECHNOLOGY REMAINS UNDERUSED

1. In 2024, **39% of Danish companies have adopted connected vehicles** in their fleets, **in line with the European trend** (38%).

   The proportion of connected vehicles is **slightly lower for passenger cars** (20%) **than LCVs** (25%).

2. However, the **actual usage of telematics data is low**, but **within the European norm**. As such, **17% Danish companies use telematics data**, including 18% coming from passenger cars and 14% from LCVs.

3. In line with European trends, **intent to use telematics is much higher than actual use:** with 64% companies in Denmark considering using this data, including those using it already. **Medium-small sized companies** (10-99 employees) demonstrate **stronger intent or use of telematics from their passenger cars and LCVs** than their European counterparts.

CONNECTED VEHICLES

USE OF CONNECTED VEHICLES

Denmark	EU
39%	38%

USE OF TELEMATICS DATA

	Denmark	EU
Already using data	17%	15%

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

All vehicles

In %

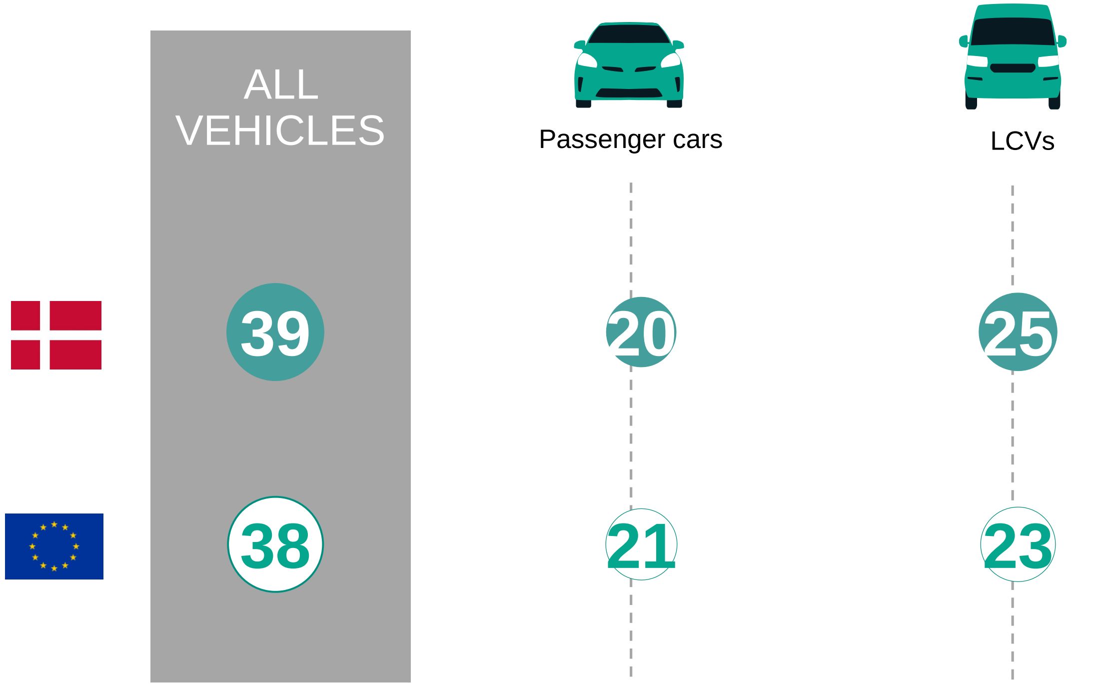
Passenger cars + LCVs

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.

20% use connected vehicles for passenger cars, while 25% use connected vehicles for LCVs.



Change of definition in 2024. No comparison with 2023

Is your fleet connected thanks to a telematic tool?

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

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

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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

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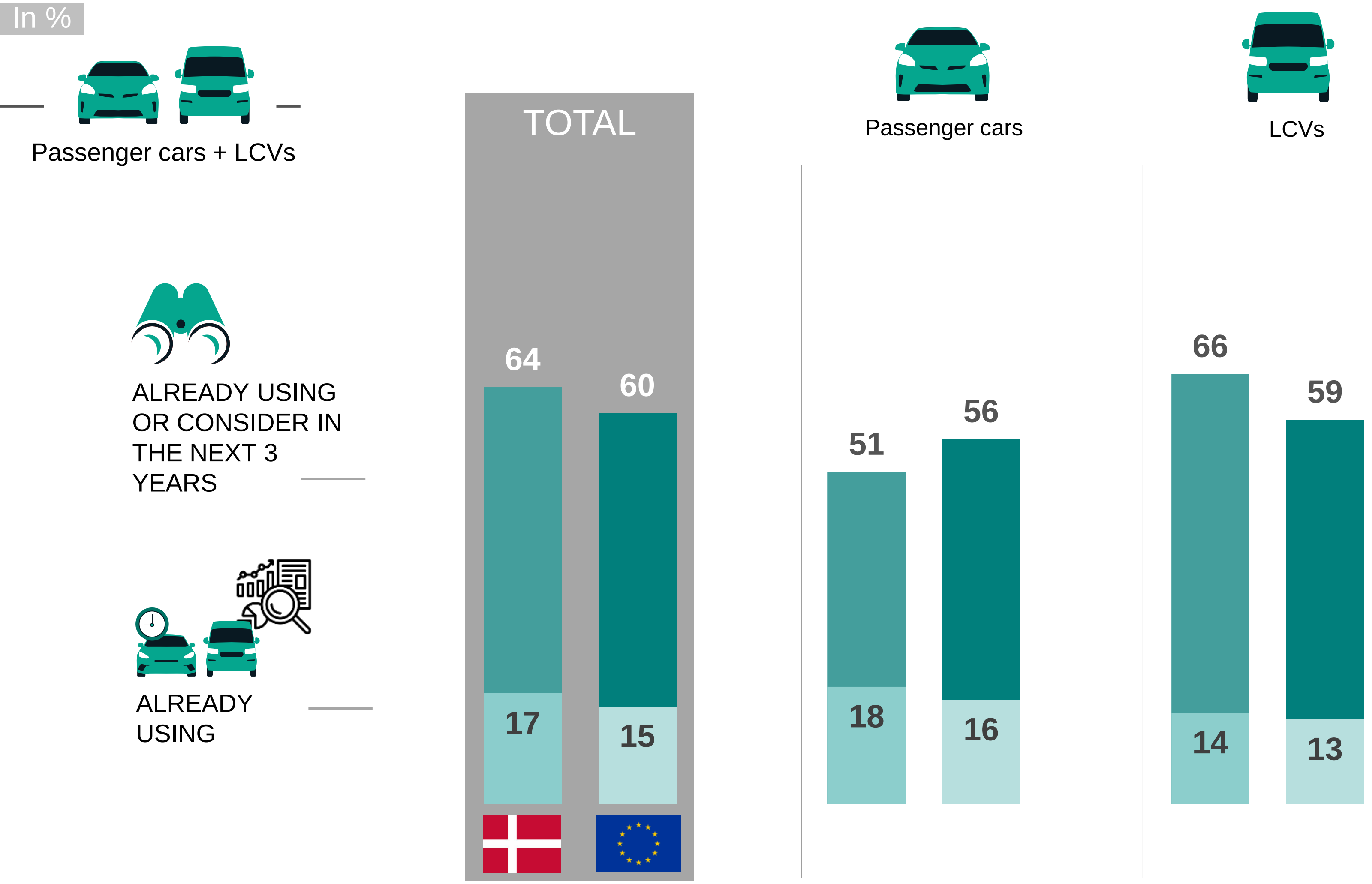
Basis: companies with corporate passenger cars / companies with corporate LCVs

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

All vehicles



HOW TO READ THE RESULTS ?

64% of the companies are already using or consider using the data coming from the vehicle box thanks to a telematics platform in the next 3 years.
17% of companies are currently using the data.

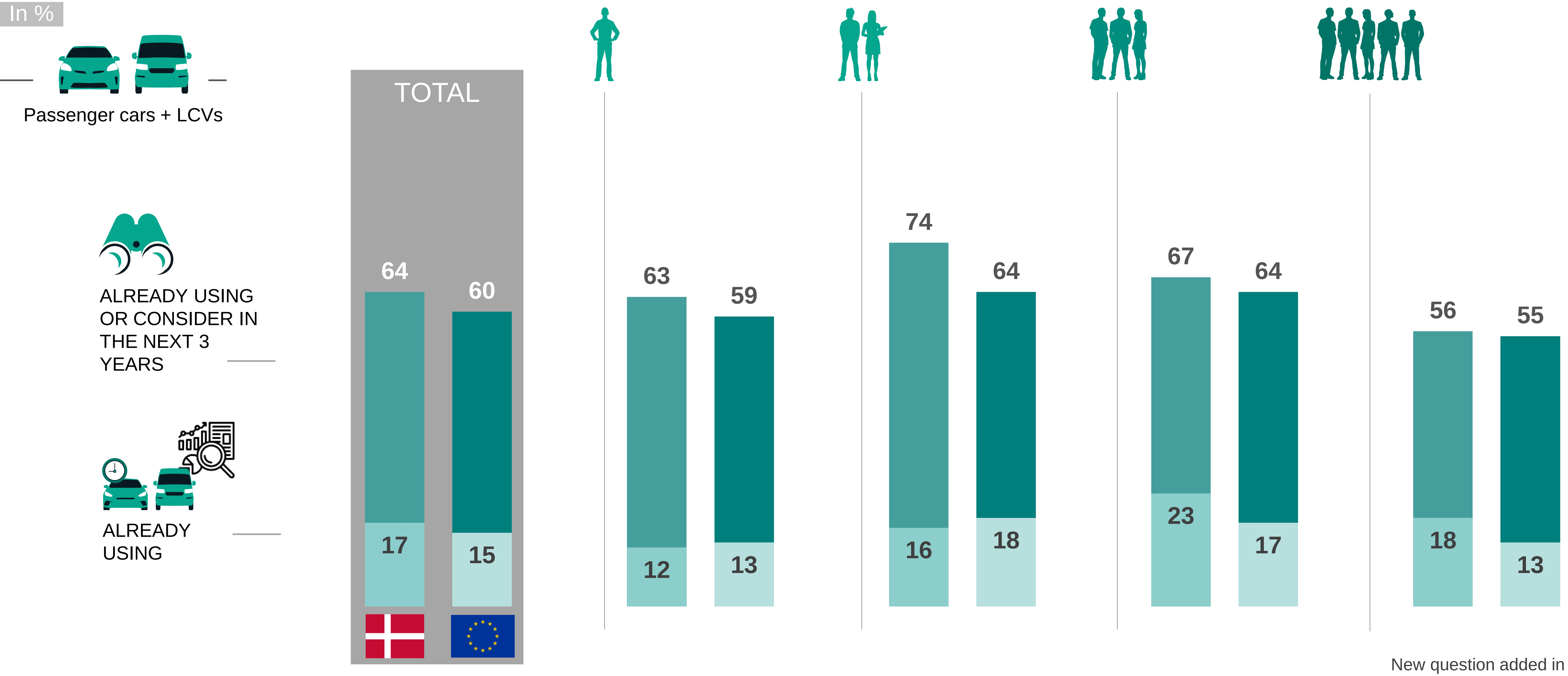
New question added in 2024

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

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

All vehicles

In %



New question added in 2024

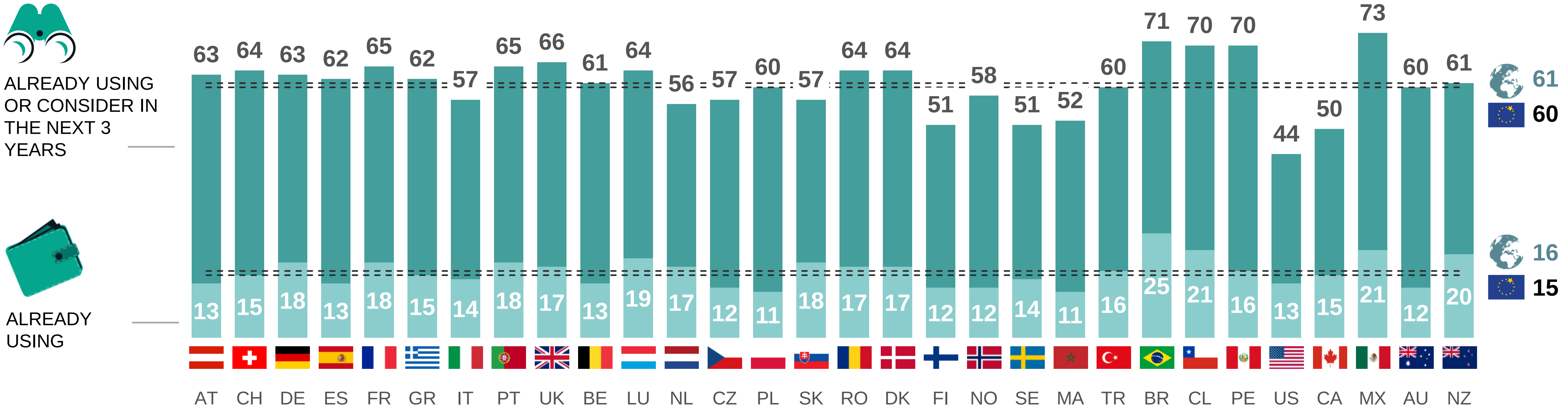
Do you use or consider using the data coming from the vehicle box thanks to a telematics platform ?
Basis: companies with a fleet using connected vehicles for all or part of their fleet.

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

All vehicles

In %

Passenger cars + LCVs



New question added in 2024

Do you use or consider using the data coming from the vehicle box thanks to a telematics platform ?

Basis: companies with a fleet using connected vehicles for all or part of their fleet.

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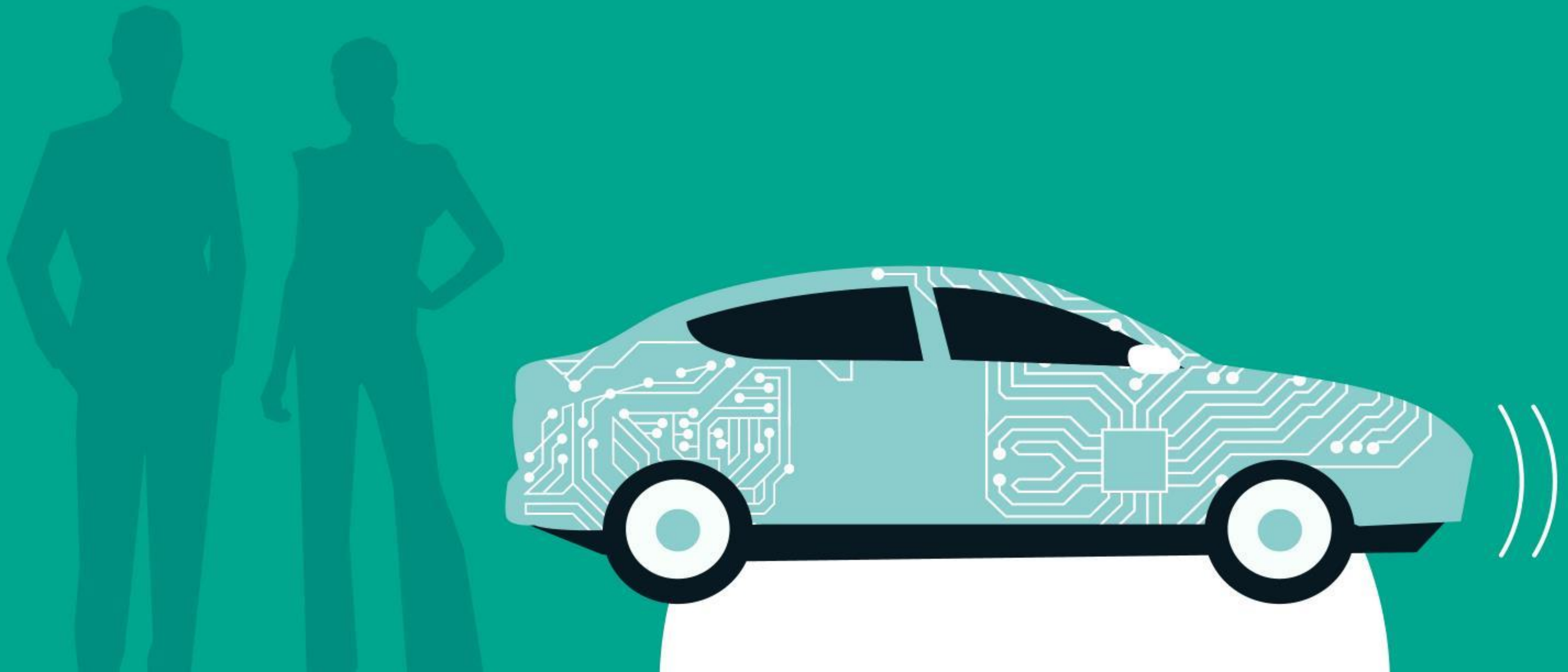
7

CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY

A. PASSENGER CARS



PROPORTION OF COMPANIES USING CONNECTED VEHICLES

Passenger cars

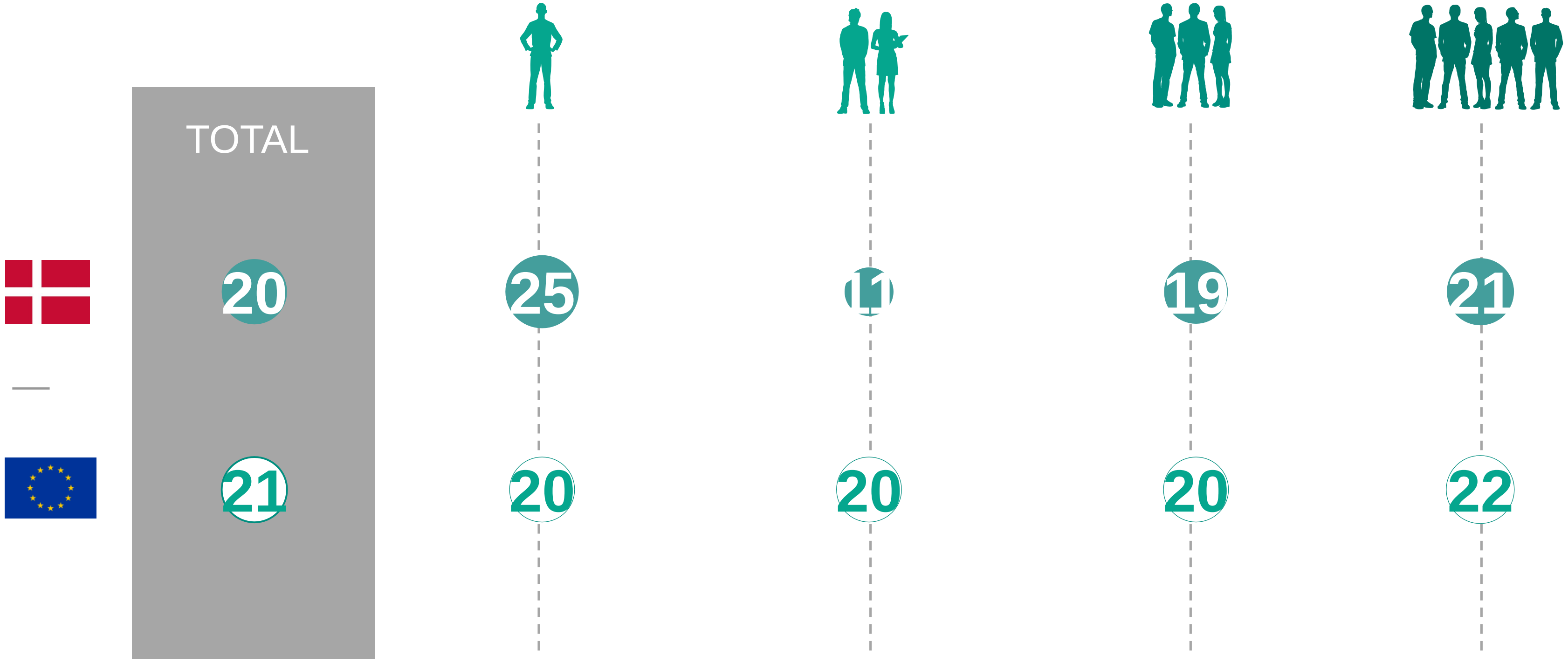
In %

Passenger cars

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

HOW TO READ THE RESULTS ?

20% use connected vehicles for passenger cars.



Change of definition in 2024. No comparison with 2023

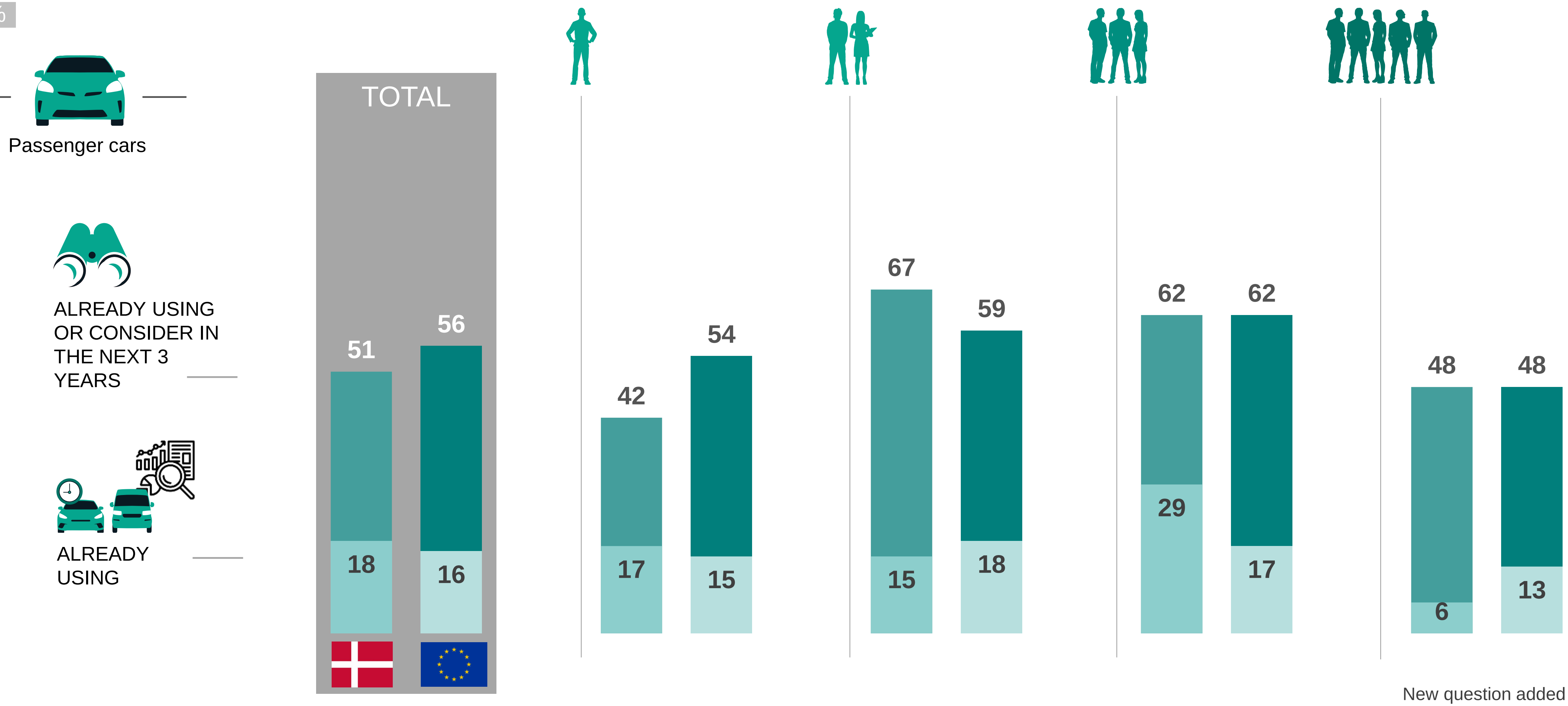
Is your fleet connected thanks to a telematic tool?

Basis: companies with at least one passenger car in fleet

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

Passenger cars

In %



New question added in 2024

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

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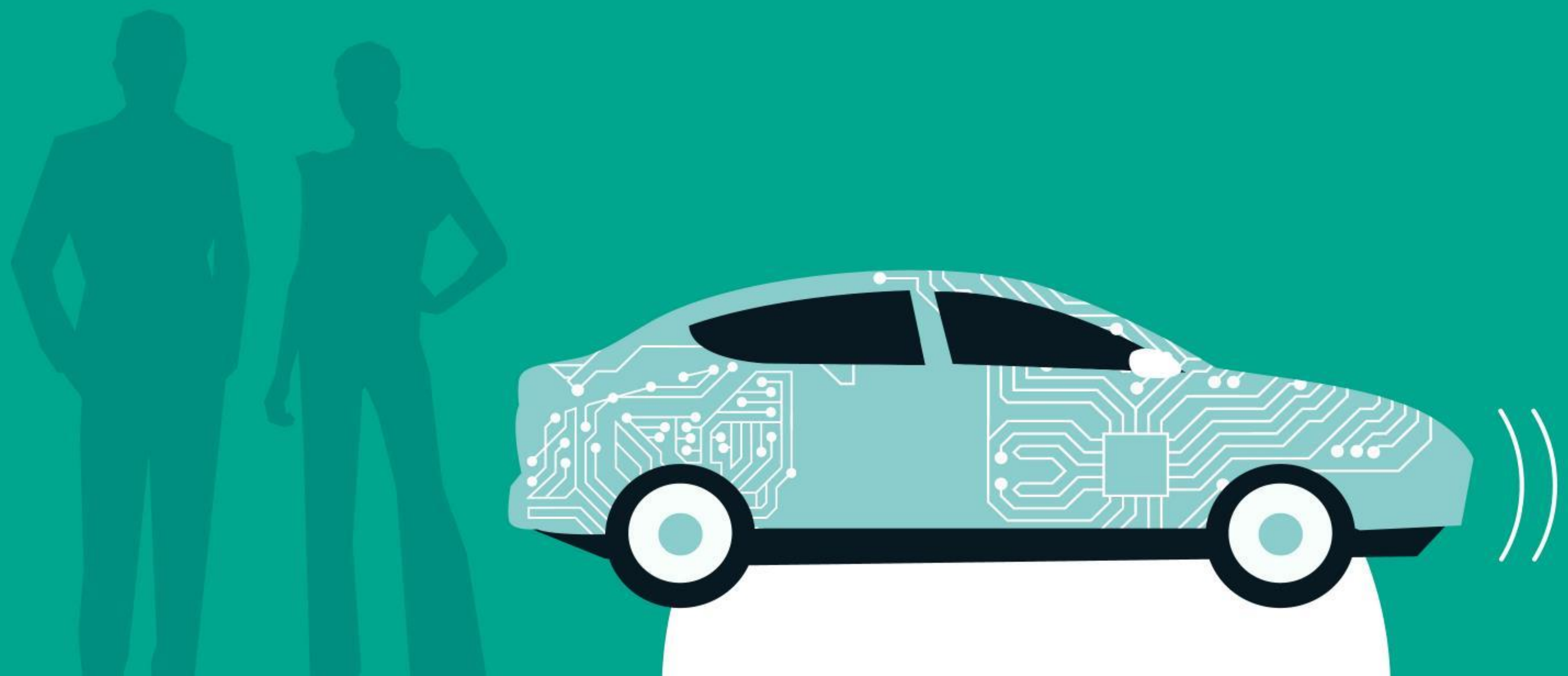
7

CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY

B. LCVs



PROPORTION OF COMPANIES USING CONNECTED VEHICLES

LCVs

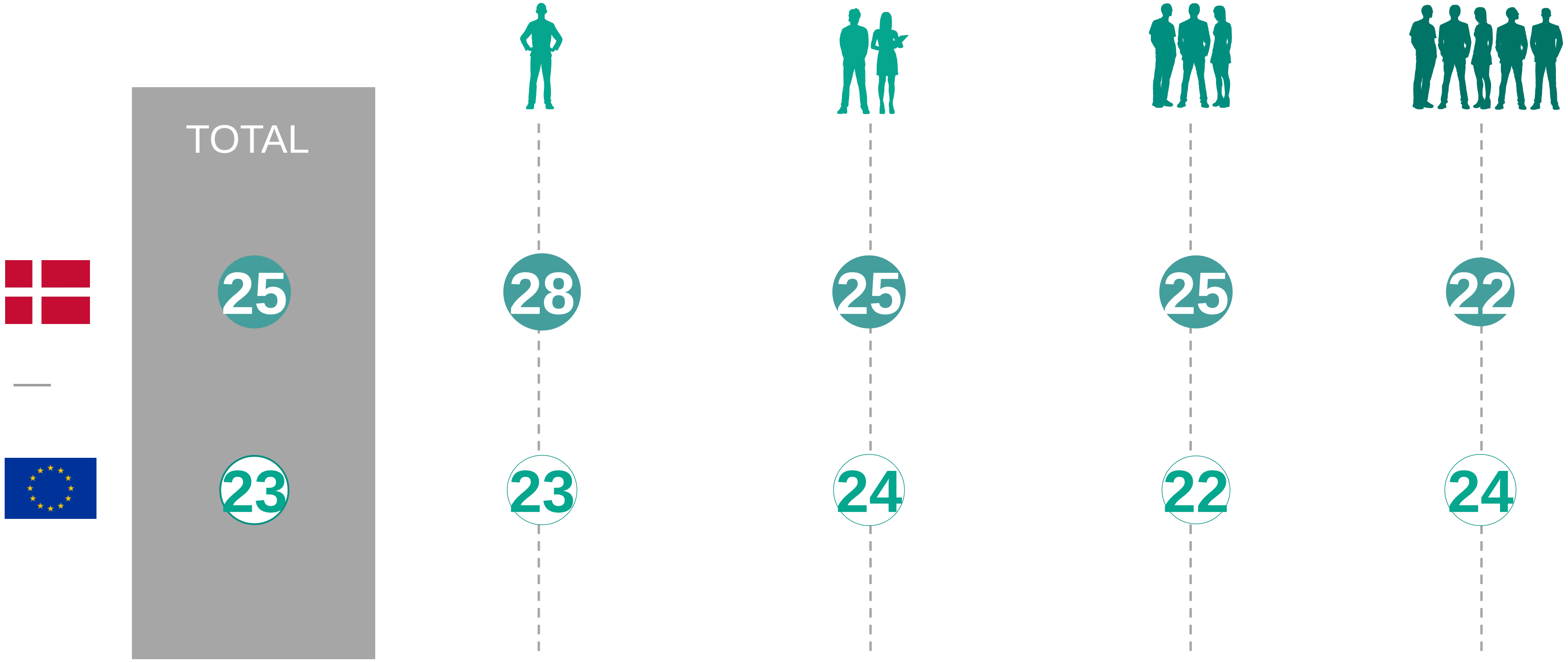
In %

LCVs

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

HOW TO READ THE RESULTS ?

25% use connected vehicles for LCVs.



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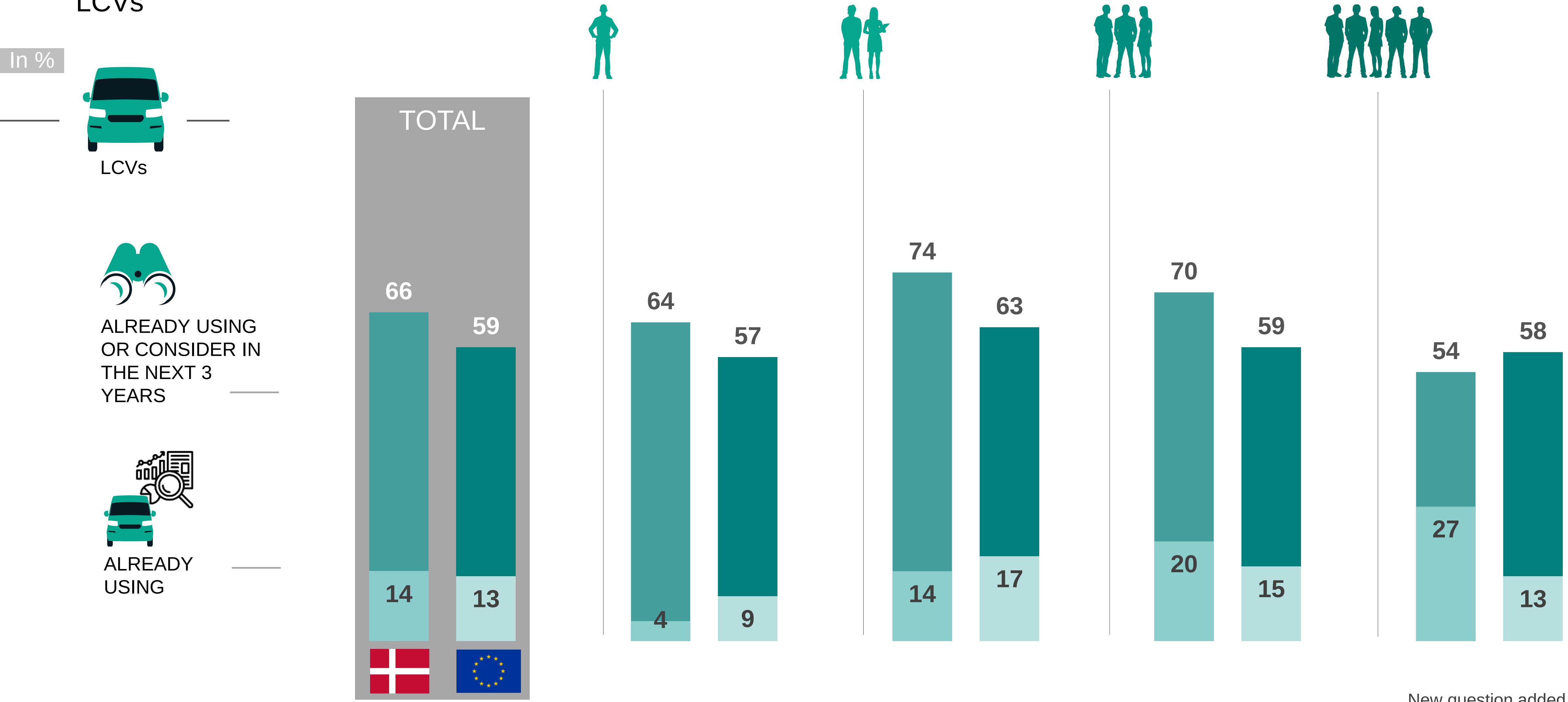
Basis: companies with at least one LCV car in fleet

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

LCVs

In %



New question added in 2024

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

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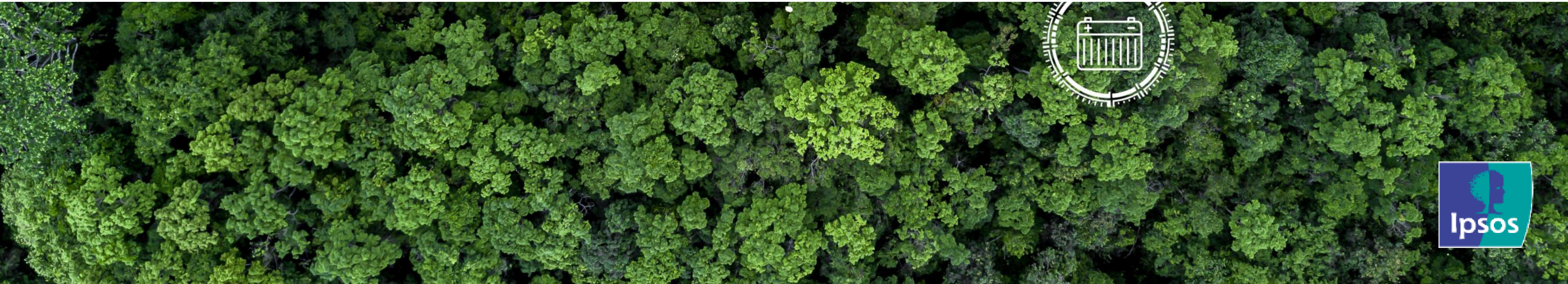
Thank you



Ipsos