



Arval Mobility  
Observatory



# 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

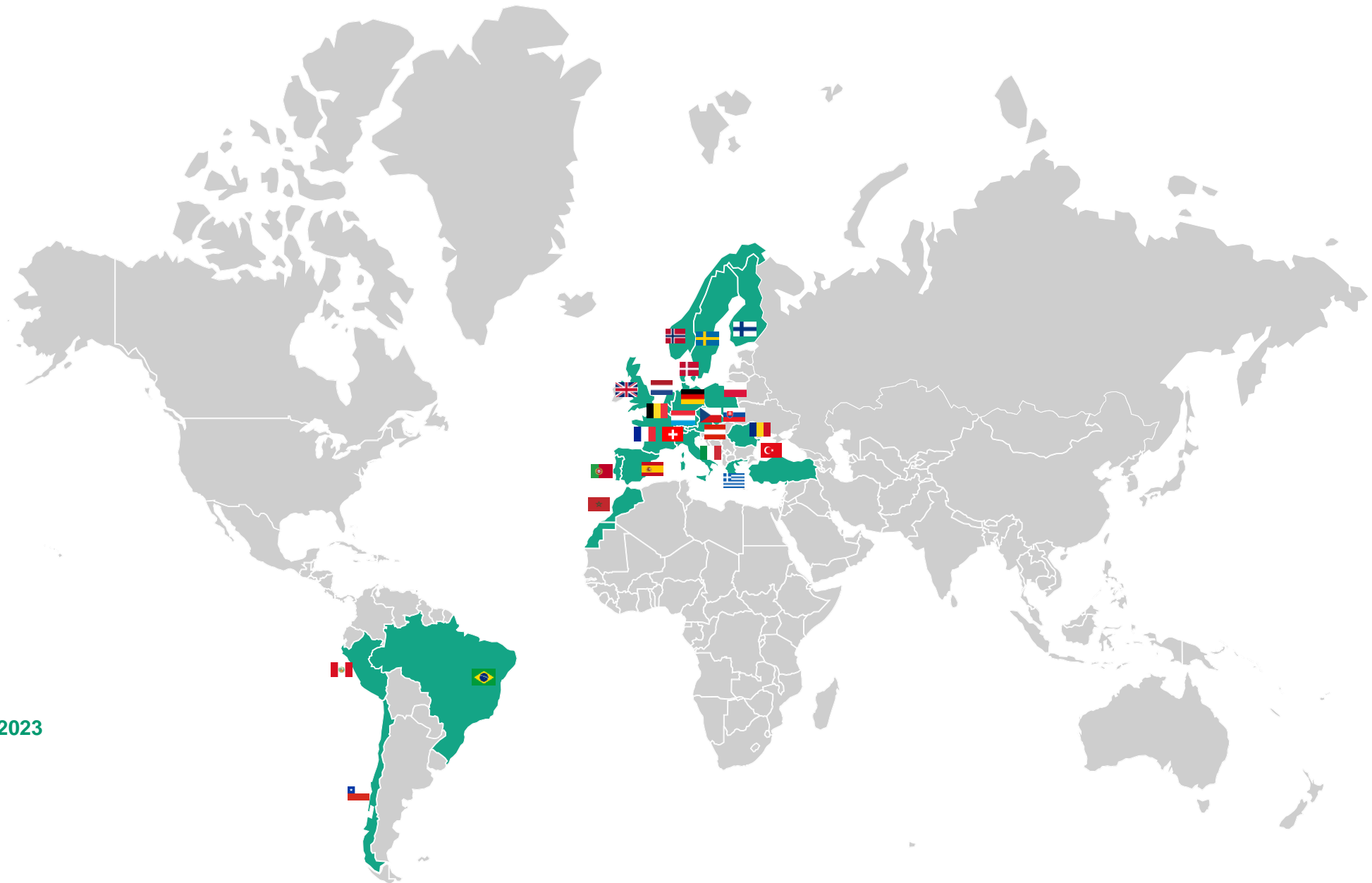
WHAT KIND OF VEHICLES  
WILL THE MARKET  
EXPECT IN 3 YEARS?



3

HOW DO MOBILITY  
SOLUTIONS IMPACT  
FLEET MANAGEMENT?

# SCOPE OF THE SURVEY



■ 25 countries in 2023

# COMPANY SIZE SEGMENT DEFINITION

WORLD

EUROPE

OUTSIDE EUROPE



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

# METHODOLOGY



DATA COLLECTION METHOD



FIELDWORK PERIOD



TARGET



QUOTAS



SAMPLE



DURATION OF INTERVIEW

CATI SYSTEM  
(Computer Assisted Telephone Interviewing)  
Recruitment by telephone



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

COMPANY SIZE & SECTOR

5 865 | through Europe  
1 357 | out of Europe

20 minutes on average

7 222 | Interviews in total

## 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 GREECE

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.  
**81 INTERVIEWS**



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



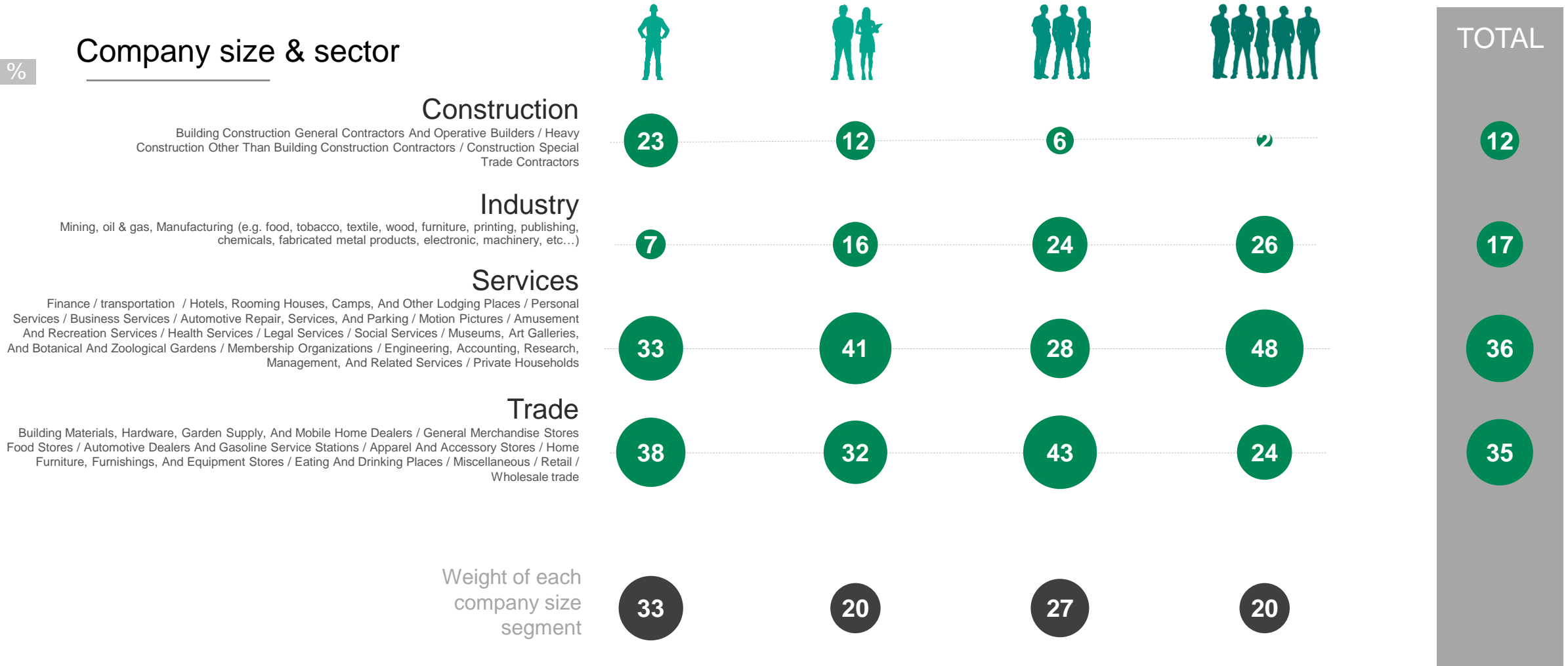


# SAMPLE STRUCTURE IN GREECE



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



#1

## MORE THAN A STABILITY, GREEK FLEET MANAGERS ANTICIPATE AN INCREASE OF THEIR FLEETS

- An overall confidence for the future : the vast majority of Greek companies anticipate a stability or increase of their fleet (95% vs 91% in Europe).
  - Greek fleet managers are particularly optimistic as 38% anticipate an increase of their fleets, in progression compared to last year.
  - The main reason behind this optimism is based on a promising economic context (anticipation of business development as a reason for fleet increase), and to a lesser extent on HR related needs.
  - However, Greek companies don't reduce the lifecycle of their vehicles : they still keep their fleets longer than in other European average.
- Concerning future challenges, Greek fleet managers seem more concerned by mitigating the increase of the total cost of ownership of the vehicles than the rest of Europe, which are rather interested in the implementation of alternative fuel technologies

## INSIGHT 2: A STILL EMERGING MARKET FOR ALTERNATIVE FUEL TECHNOLOGIES ADOPTION BUT A GROWING ONE REGARDING MOBILITY SOLUTION IMPLEMENTATION

#2

### AN ADOPTION OF ALTERNATIVE TECHNOLOGIES STILL AT A LOWER LEVEL OF MATURITY

This year, **two thirds of Greek companies are already using or consider using an alternative fuel technology for their passenger cars:**

- **Stable use level** compared to last year
- **But a higher consideration** for the next 3 years
- Overall, Greece remains below Europe

When looking at the energy mix, the market is **slightly dominated by the Hybrid** thanks to the important consideration of this technology within small companies compared to other technologies. **Big companies consider more Plug-in Hybrid.**

A higher adoption of **100% BEV** is indeed slowed down

**by a significant lack of charging points** in Greece, whether in the public or in the private area.

## INSIGHT 3: OPERATING LEASING REMAINS THE SECOND FINANCING METHOD BUT SHOWS SIGNIFICANT GROWTH POTENTIAL

#3

### A HIGHER POTENTIAL FOR GROWTH THAN IN THE REST OF EUROPE

- **Self purchase remains the main fleet financing method** within Greek companies, followed by Operating leasing. **Among the largest companies, Operating leasing is more common** and tend to be as used as self purchase method.
- **An important potential for growth for Operating Leasing:** almost 1 company out of 2 intends to develop operating leasing.

#4

## GREEK COMPANIES ARE CATCHING UP THE EUROPEAN LEVEL

- **Greek companies are more voluntarist in terms of mobility solutions implementation** and catch up with the European standard : almost 3 out of 4 companies have already implemented at least one mobility solution.
- According to the company size, solutions are really different : apart from ride sharing, **the other types of mobility solutions most used in small companies** (Corporate car sharing, mobility budget and app to book mobility solutions) **are not used at all in big ones.**

## INSIGHT 5: AN INTEREST FOR CONNECTED VEHICLES STILL DRIVEN BY SAFETY REASONS

#5

- **The use of Telematics within Greek companies is stable this year, and slightly below the European average.**
- **In the detail, LCVs are more equipped than passenger cars, and the use of this kind of vehicles is more widespread in the largest companies.**
- **The main motivation to use these connected vehicles still mainly relies on vehicle's location and security.**



3

# WHAT ARE THE MAIN CHARACTERISTICS OF THE FLEETS?



# GREEK COMPANIES SHOW THE BEST BALANCE (INCREASE – DECREASE) FOR THE FUTURE OF THEIR FLEETS IN EUROPE

1

- A large majority of Greek companies are really optimistic about the future of their fleets : 95% anticipate at least a stability, and almost 4 out of 10 companies anticipate an increase, well above the European trends (38% vs 23%). **Greek companies show the best balance (increase – decrease) of Europe, twice as high as the average.**

In line with the European trend, **the fleet increase is mostly driven by business development (61%)**. The HR strategy (for recruiting and retaining talents) appears as the second reason but far behind (35%) . To be noticed : **Greek companies plan to propose more vehicles to employees with no company car eligibility than last year (26% vs 9%)**.

2

- However, even if Greek companies are confident about the future of their fleets, **they keep their vehicles longer than in other European countries, Greek fleets length remains stable.**

3

- Despite the will of a quarter of Greek companies to introduce or increase **homeworking**, this new way of working has still **a limited effect on mobility policy**, as only 15% changed or consider changing their mobility or fleet policy coinciding with homeworking.

4

- Regarding the future challenges for fleet managers, while European countries seem more challenged by reducing the share of petrol or diesel vehicles within their fleets, **Greek companies are also quite concerned by the increase of total cost of ownership of the vehicles and the way to mitigate it.**

# FLEET PROFILE



## MOBILITY POLICY

## ADAPTATION

## COINCIDING WITH

## HOMEWORKING



15%

changed the policy or consider changing



15% 13



## FLEET POSSESSION LENGTH

6.8

years



5.6

years



## ANTICIPATED

## FLEET EVOLUTION

(% will increase or remain stable)



95%



91% 93

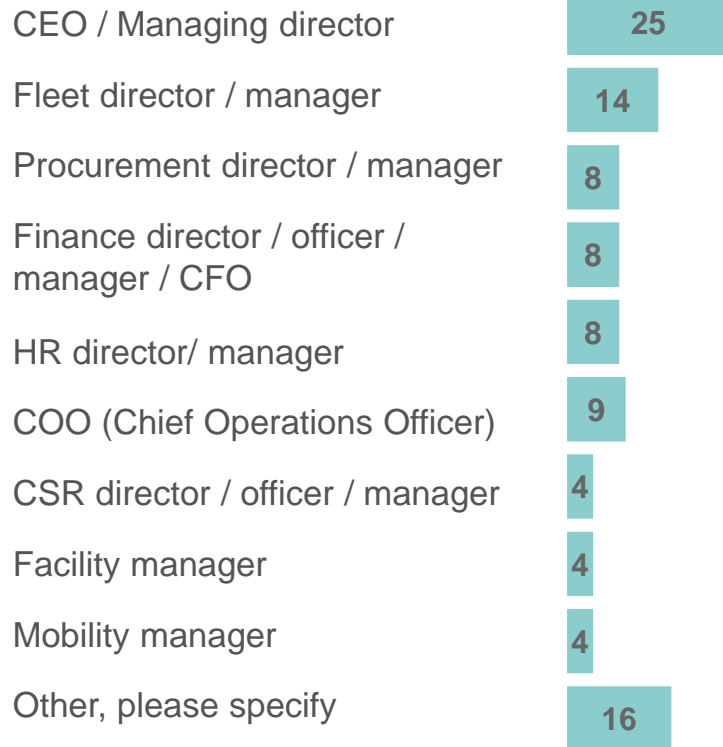


# RESPONDENTS POSITION WITHIN THE COMPANY

In %



Passenger cars + LCVs



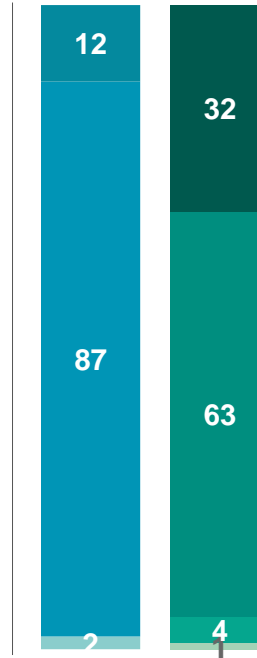
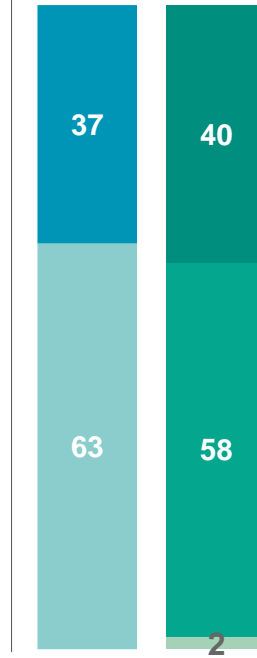
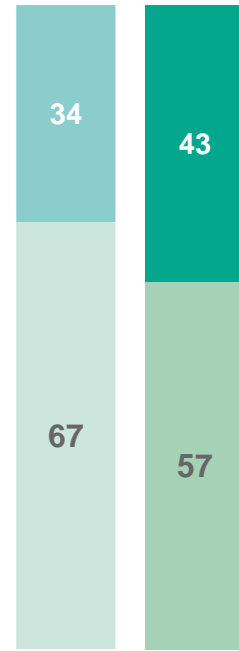
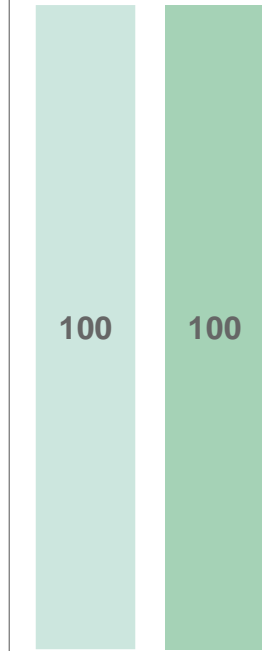
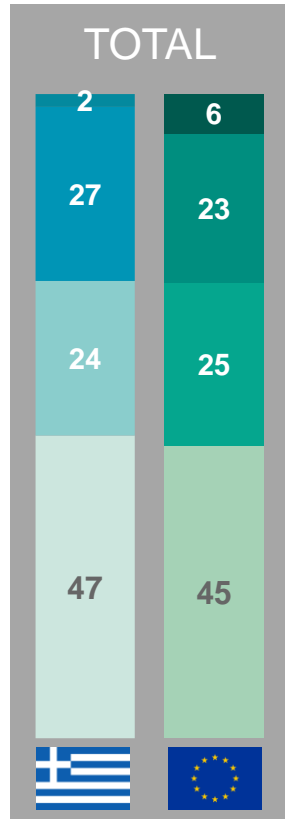
# NUMBER OF VEHICLES IN FLEET

In %



Passenger cars + LCVs

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

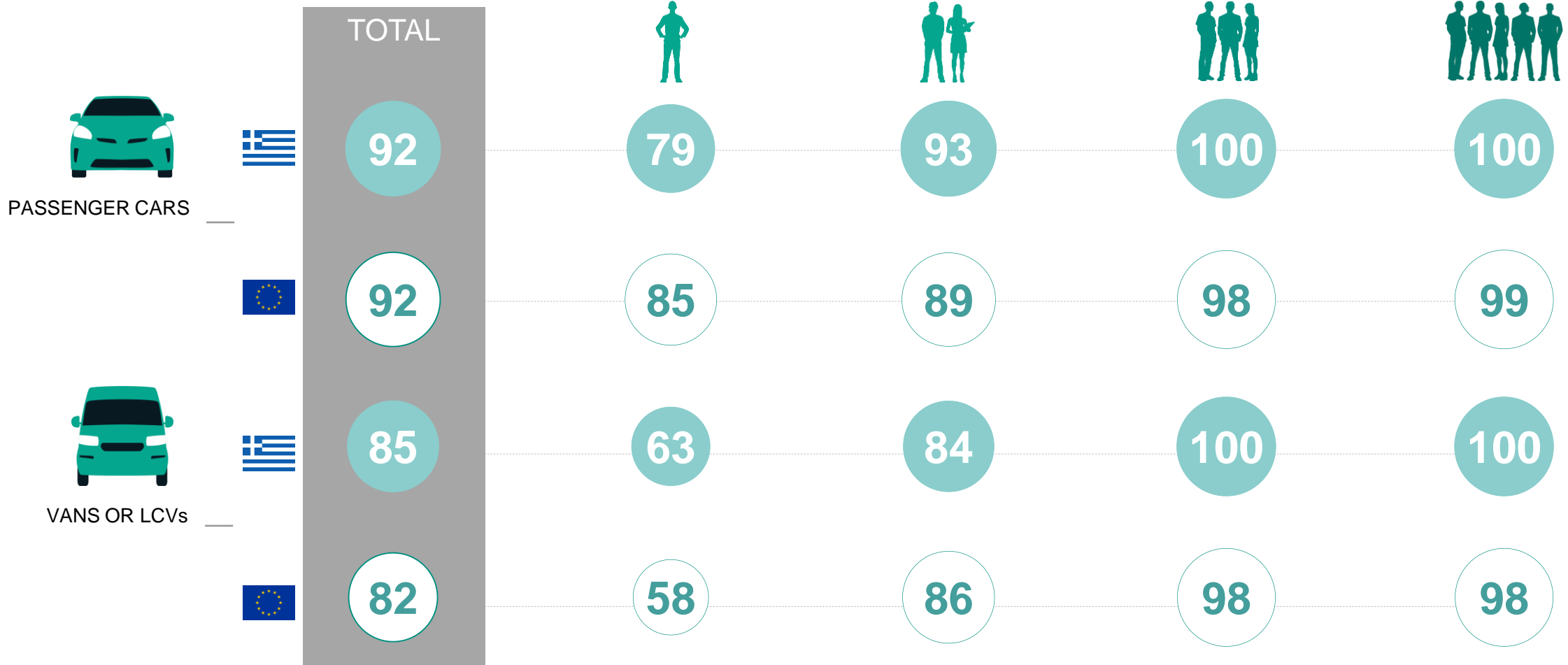


Can you please tell us the total number of vehicles of less than 3.5 tons in your fleet?  
Basis: companies with corporate vehicles = 100%

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

(among companies with at least one vehicle in fleet)

In %



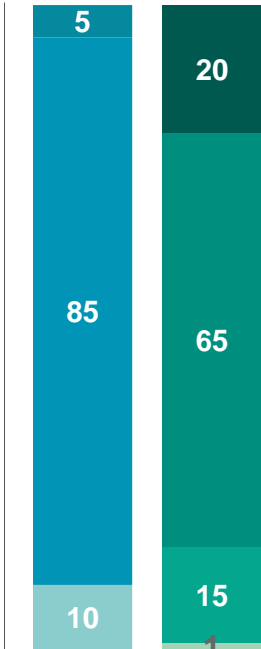
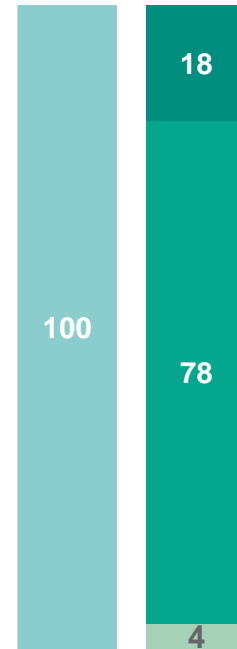
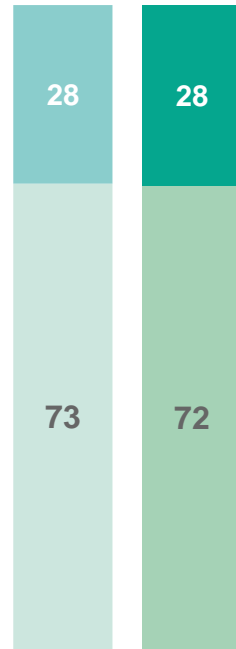
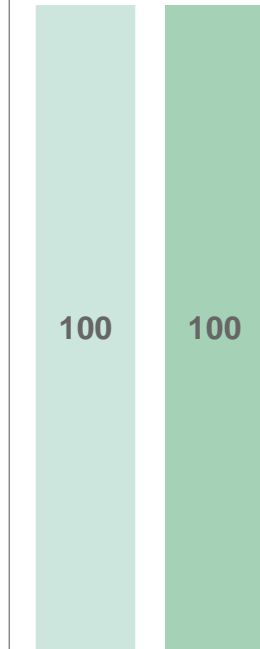
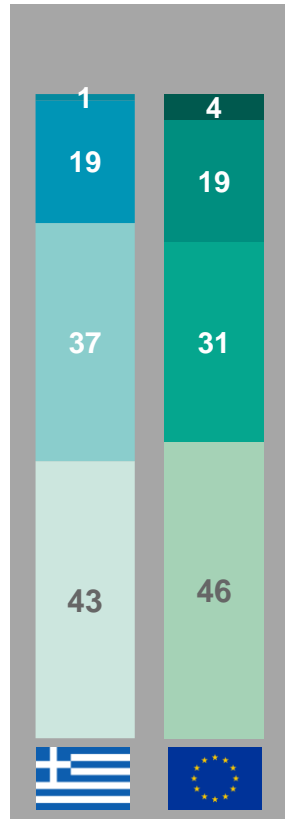
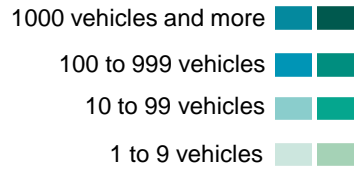
And can you please tell us the total number of cars in your fleet? / And can you please tell us the total number of LCVs or vans in your fleet?  
 Basis: companies with corporate vehicles = 100%

# NUMBER OF PASSENGER CARS IN FLEET

In %



Passenger cars



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

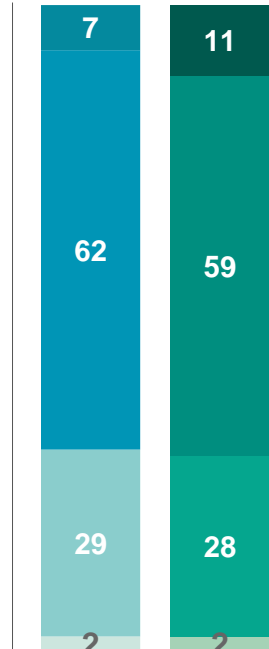
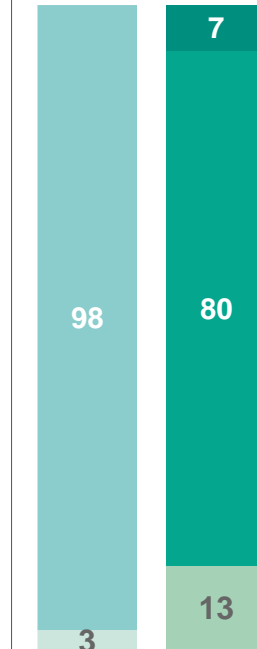
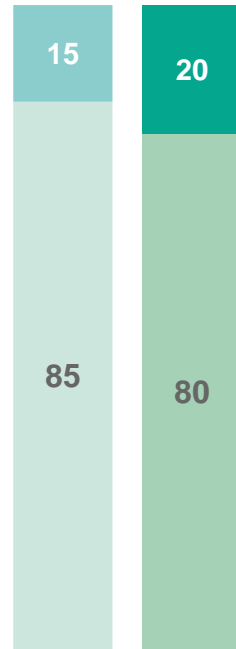
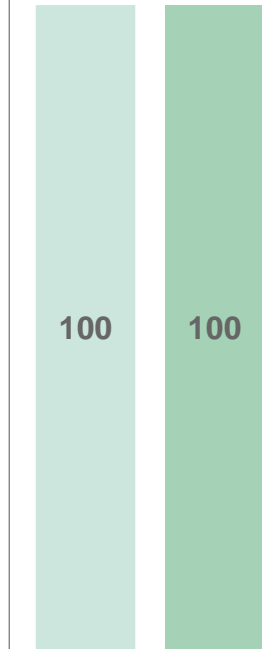
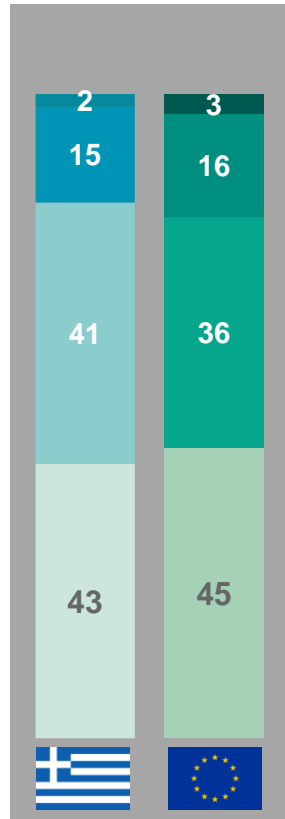
# NUMBER OF LCVS IN FLEET

In %



LCVs

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



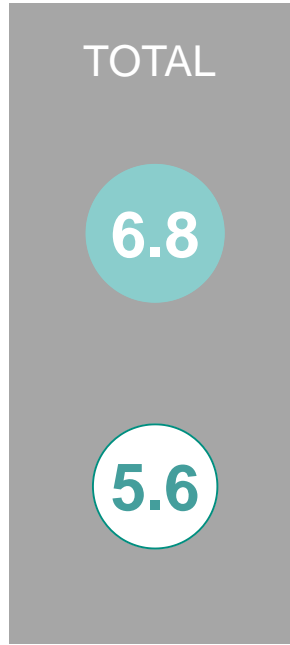
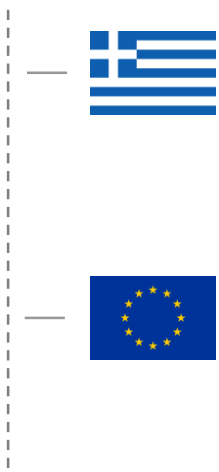
And can you please tell us the total number of LCVs or vans in your fleet?  
**Basis: companies with LCVs**



# VEHICLES POSSESSION LENGTH



AVERAGE IN YEARS



*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



6.6



5.8

TOTAL



6.7

5.8



7.5

5.9



6.7

5.7



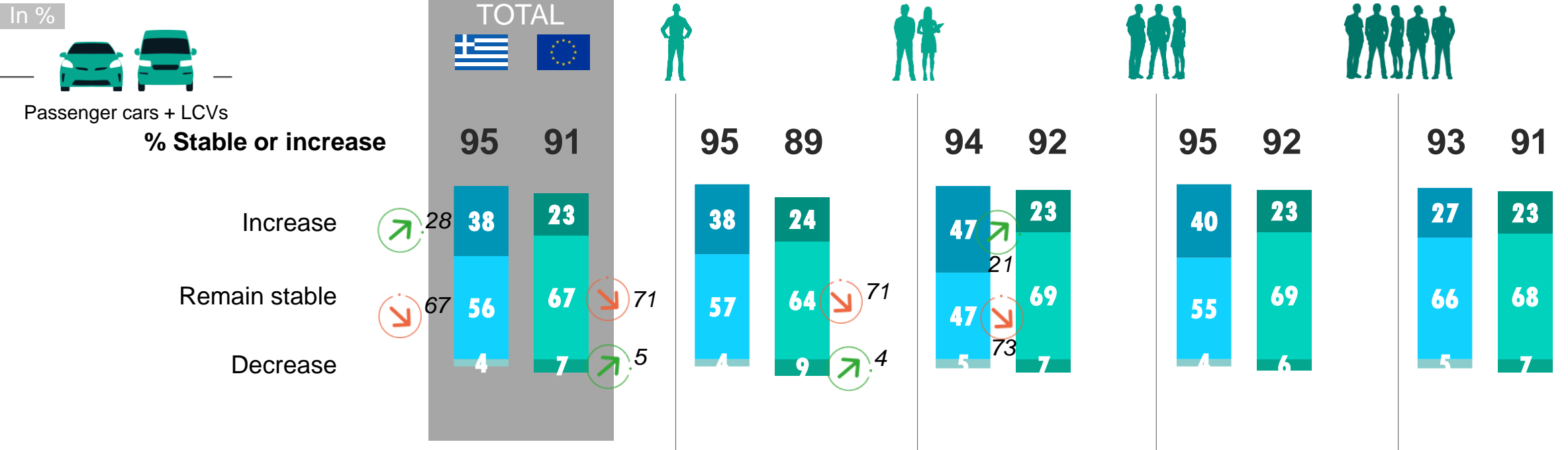
5.8

5.7

# FLEET GROWTH POTENTIAL

## HOW TO READ THE RESULTS ?

In Greece, 95% of the companies declare that in the next 3 years their company fleet will remain stable or increase.



### BALANCE in pts (INCREASE ⊖ DECREASE)

2023	+34	+16	+34	+15	+42	+16	+36	+17	+22	+16
2022	+24	+18	+29	+19	+19	+17	+23	+17	+24	+17
2021	-	+35	-	+22	-	+31	-	+43	-	+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%





# PASSENGER CAR FLEET GROWTH POTENTIAL

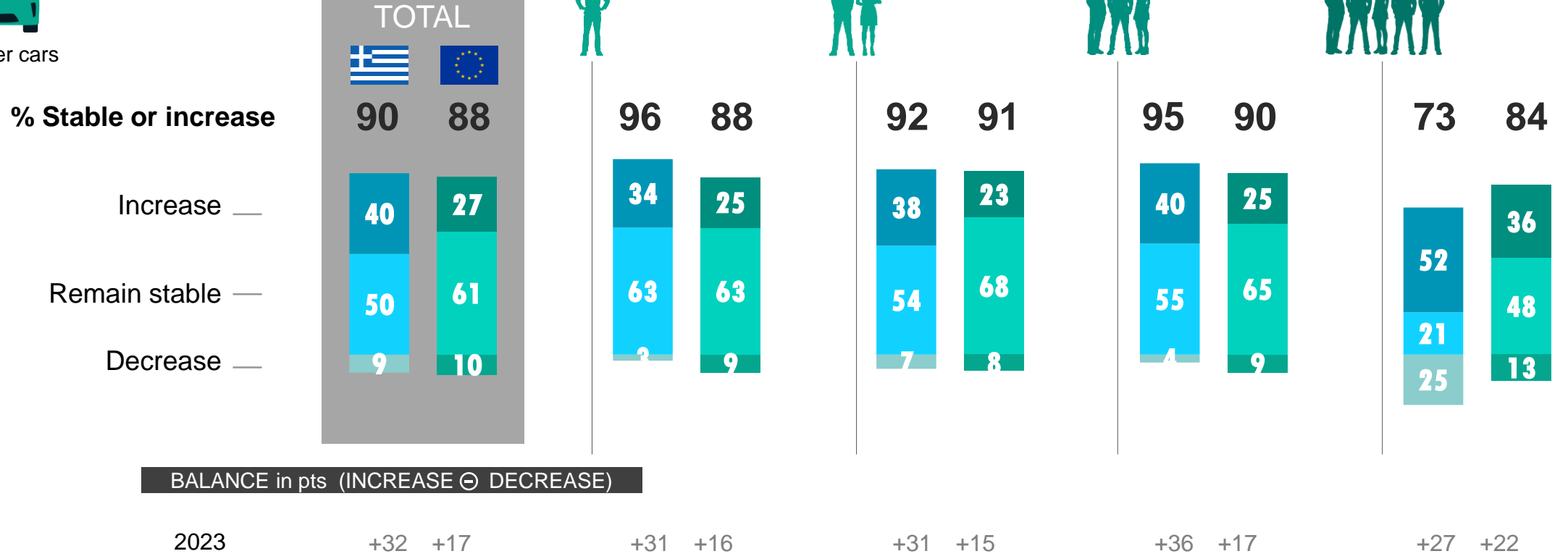
In %



Passenger cars

## HOW TO READ THE RESULTS ?

In Greece, 90% of the companies declare that in the next 3 years the total number of passenger cars will remain stable or increase.



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

# PASSENGER CAR FLEET GROWTH POTENTIAL

## HOW TO READ THE RESULTS ?

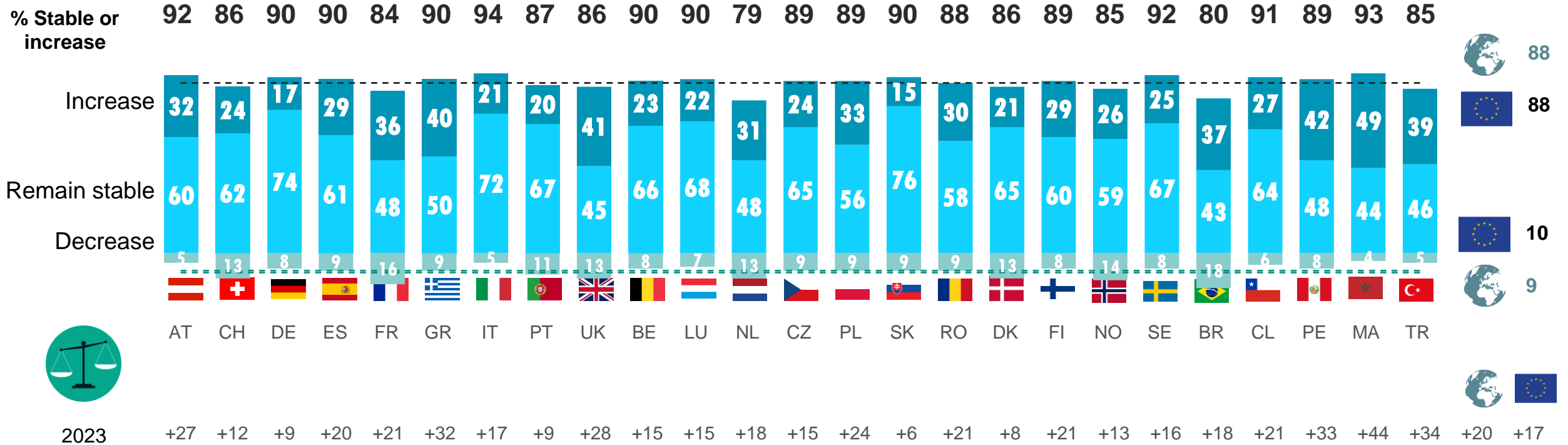
In Greece, 90% of the companies declare that in the next 3 years their company fleet of passenger cars will remain stable or increase.

In %



Passenger cars

% Stable or increase



2023

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

## HOW TO READ THE RESULTS ?

In Greece, 91% of the companies declare that in the next 3 years the total number of LCVs will remain stable or increase.

% Stable or increase

TOTAL



91 89

Increase

42 26

Remain stable

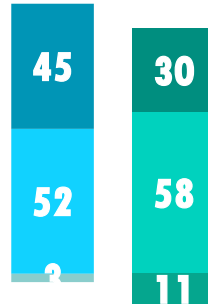
50 63

Decrease

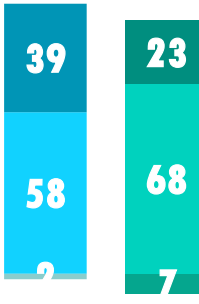
8 9



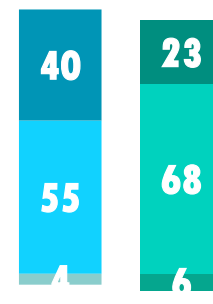
97 88



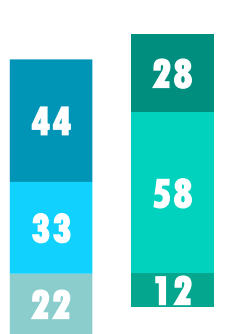
96 91



95 92



76 86



BALANCE in pts (INCREASE ⊖ DECREASE)

2023

+34 +17

+42 +19

+37 +15

+36 +17

+22 +17

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



# LCVS FLEET GROWTH POTENTIAL

## HOW TO READ THE RESULTS ?

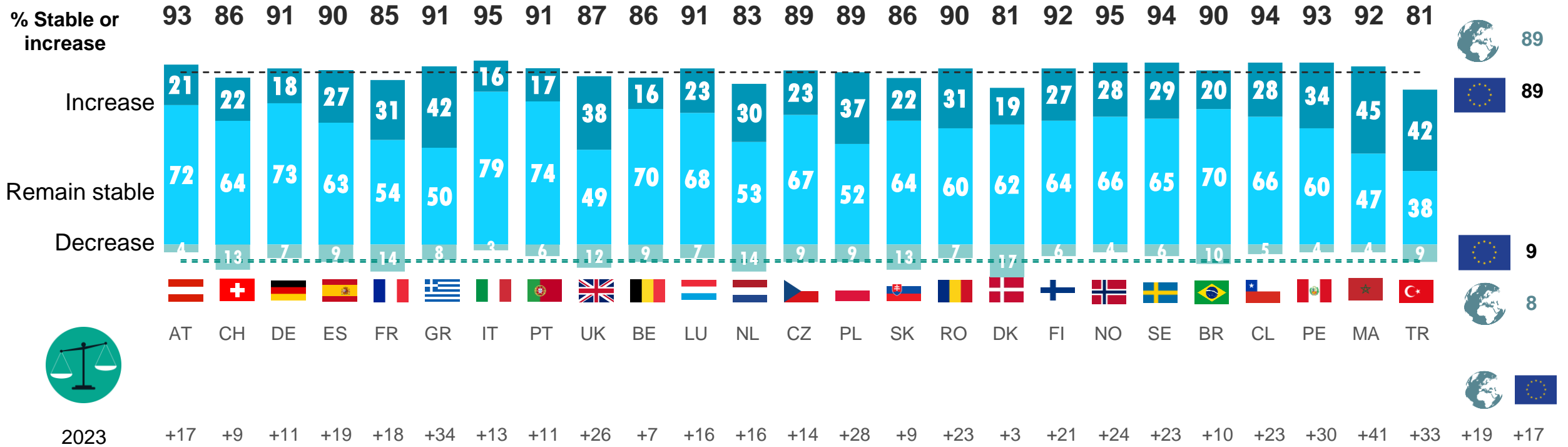
In Greece, 91% of the companies declare that in the next 3 years their company fleet of LCVs will remain stable or increase.

In %



LCVs

% Stable or increase



2023

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

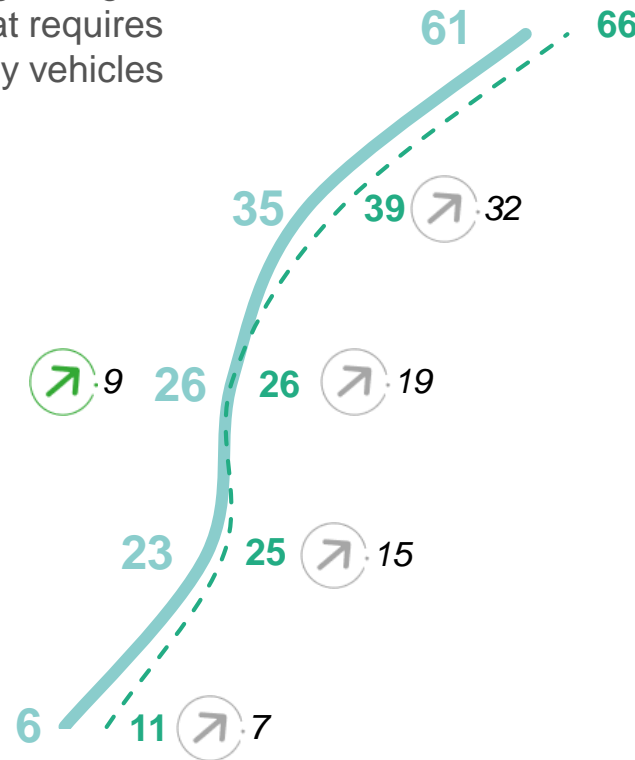
Because your company is growing or developing a new activity that requires company vehicles

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

Because of tax decreases

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

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



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

# READY TO INTRODUCE OR INCREASE HOMEWORKING

In %

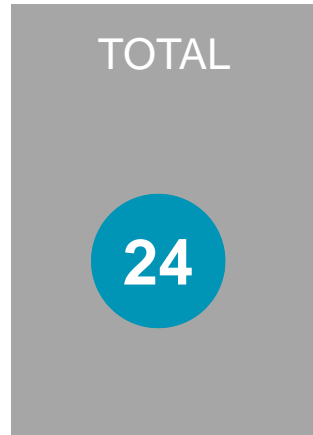


Passenger cars + LCVs

% YES



Average number of days per week



2.5



2.4



2.7



2.5



2.1

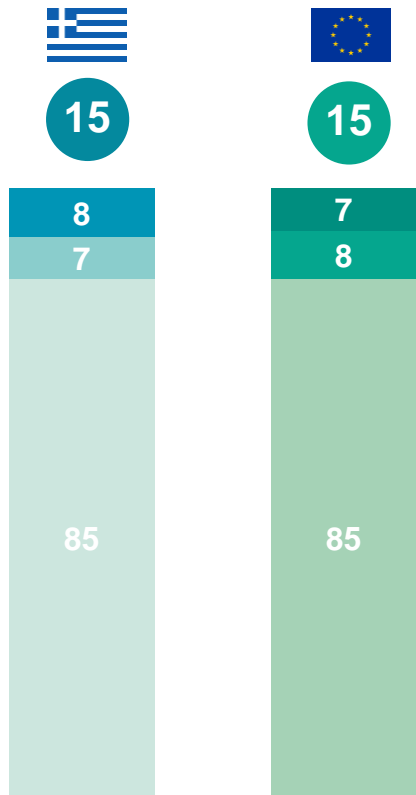
Would you be ready to introduce or increase homeworking for your employees?  
How many days per week would you allow homeworking for your employees?  
Basis: companies with corporate vehicles = 100%

# MOBILITY POLICY ADAPTATION COINCIDING WITH HOMEWORKING

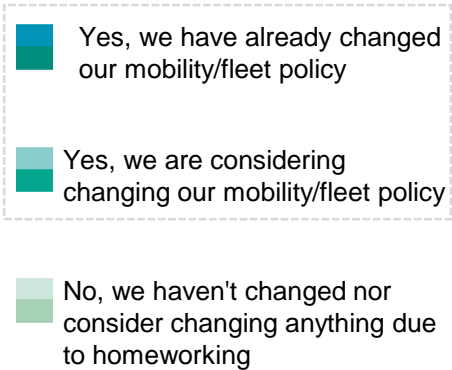
In %



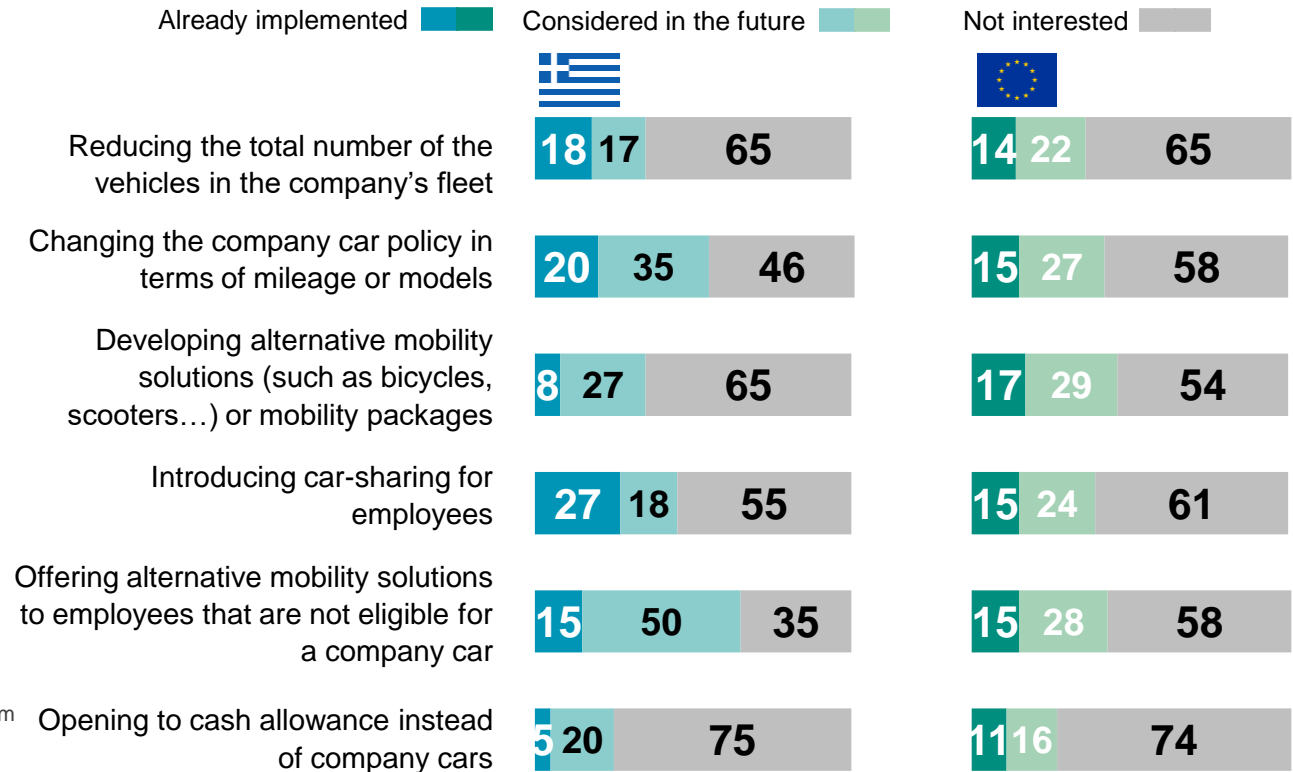
Passenger cars + LCVs



## NET CHANGED THE POLICY OR CONSIDER CHANGING



**HOW TO READ THE RESULTS ?**  
 In Greece, among the companies that changed or consider changing their mobility policy, 18% 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

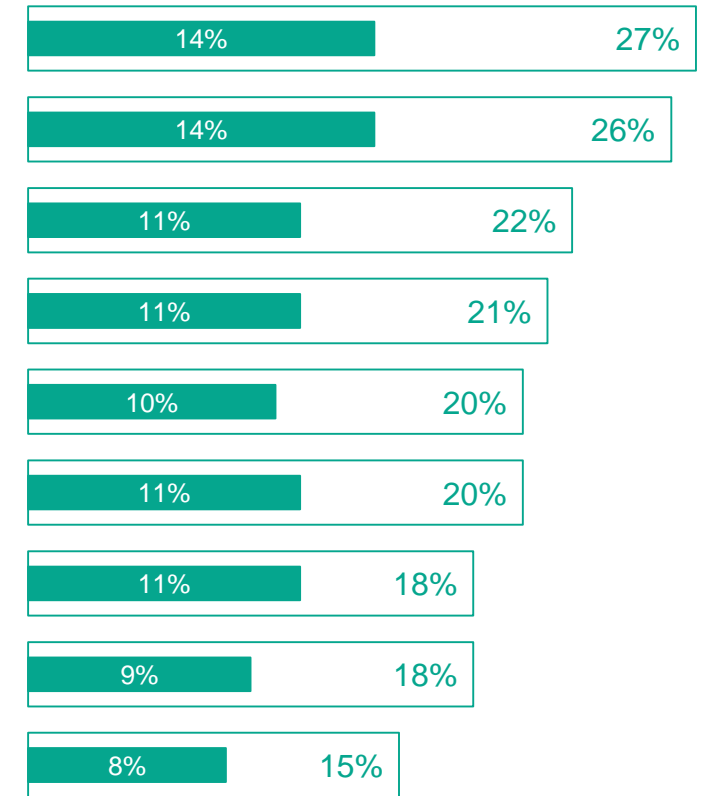
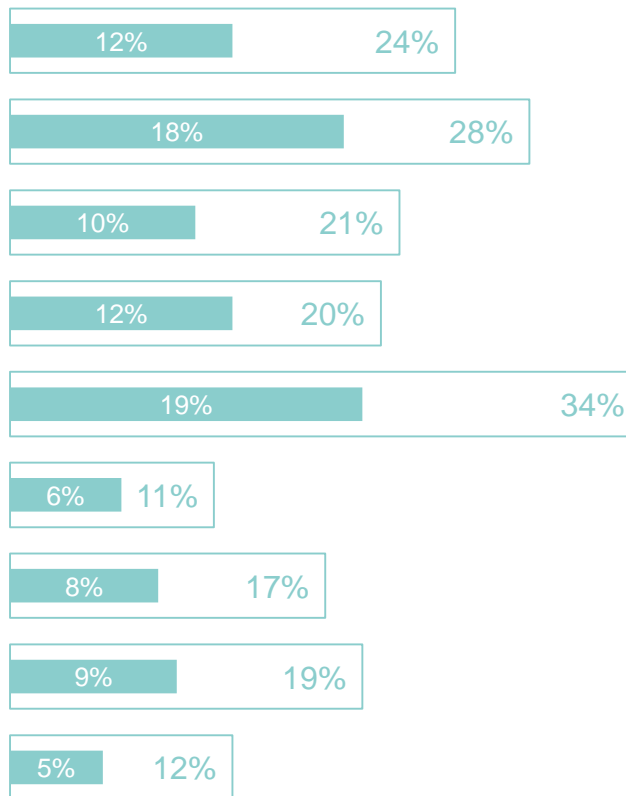
In %



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?



# AN IMPORTANT GROWTH POTENTIAL FOR OPERATING LEASING

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

1

- **Self purchase is still the main fleet financing method** (38%) within Greek companies, followed by operating leasing (27%).  
**Among big companies, operating leasing is more common** and tend to be as used as self purchase (33% vs 35%).

2

- Nevertheless, the **growth potential for operating leasing is higher than in Europe** (47% vs 34%), especially by small companies.

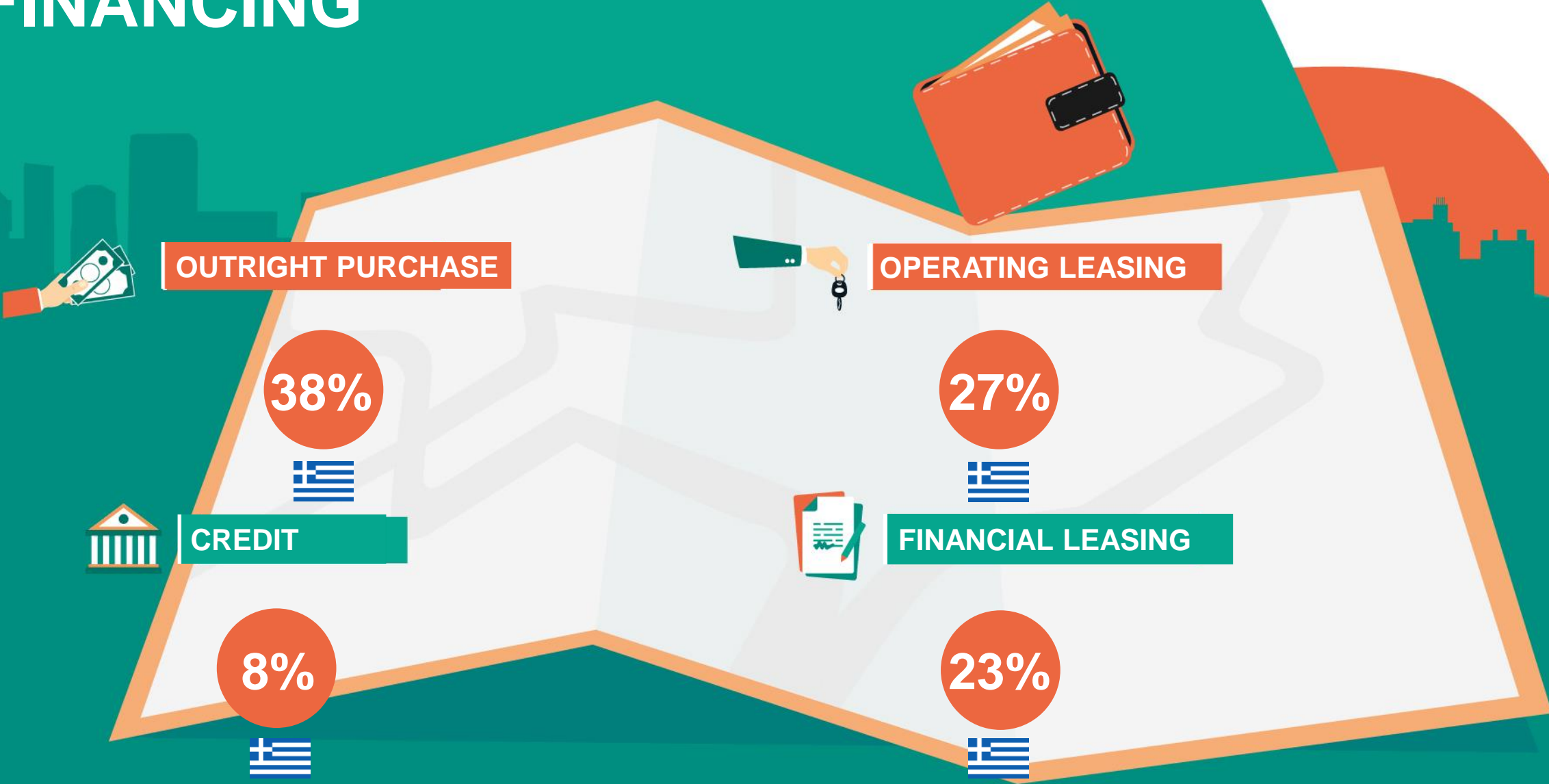
3

- Regarding leasing companies, it seems they lost some clients this year, as **half of big companies declare they don't have any leasing company** (versus around 20% last year).

If leasing companies wish to regain these clients, they should focus on **competitiveness** and **service care**, chosen by fleet managers as the most important criteria if they were to choose an Operation Leasing company.

As for the SMEs, they are primarily expecting a **financing solution** from leasing companies.

# FINANCING



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



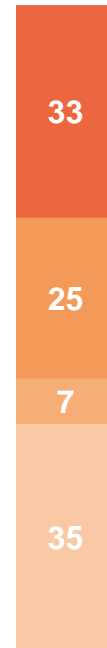
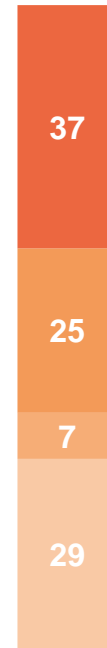
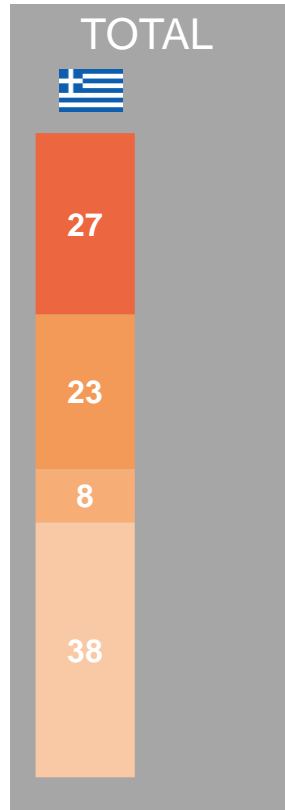
# MAIN FLEET FINANCING METHOD

In %



Passenger cars + LCVs

- Operating leasing ■
- Financial leasing ■
- Credit ■
- Outright purchase ■



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

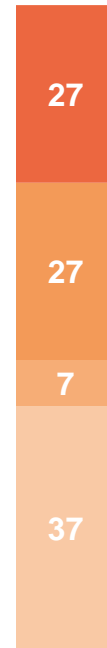
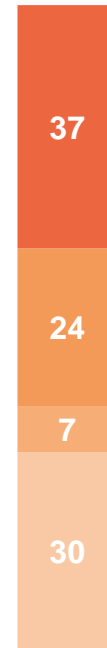
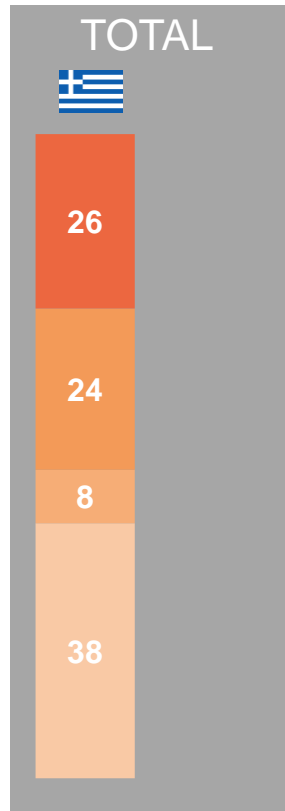
What is the main financing method used to finance your company vehicles today?  
Basis: companies with corporate vehicles = 100%

# MAIN PASSENGER CARS FINANCING METHOD

In %



- Operating leasing
- Financial leasing
- Credit
- Outright purchase



New question added in 2023

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

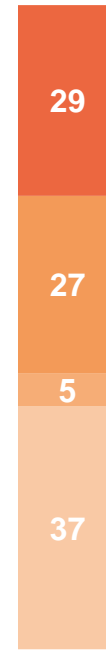
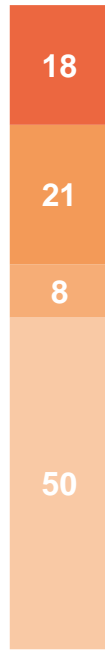
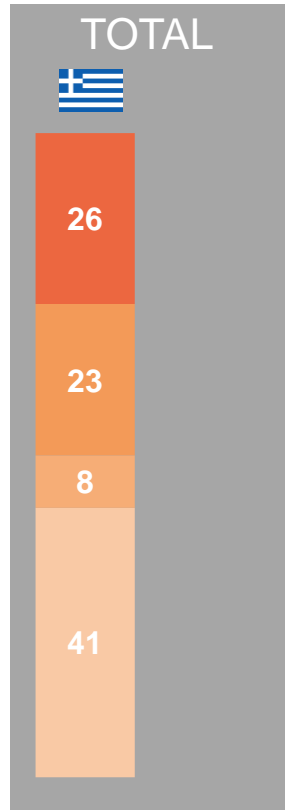
# MAIN LCV FINANCING METHOD

In %



LCVs

- Operating leasing ■
- Financial leasing ■
- Credit ■
- Outright purchase ■



New question added in 2023

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

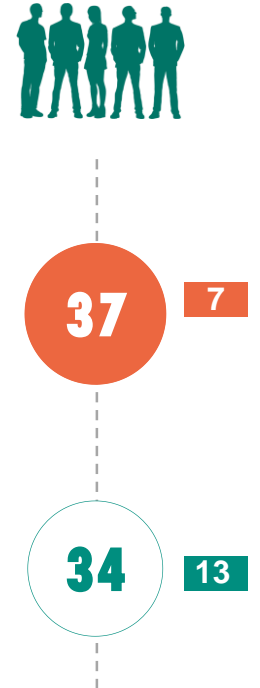
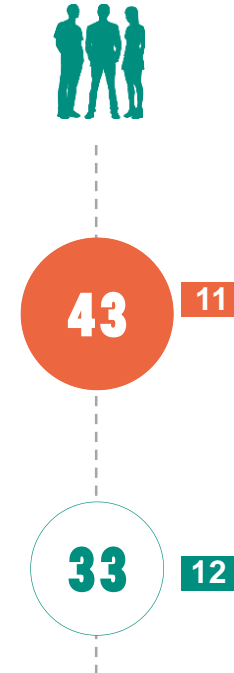
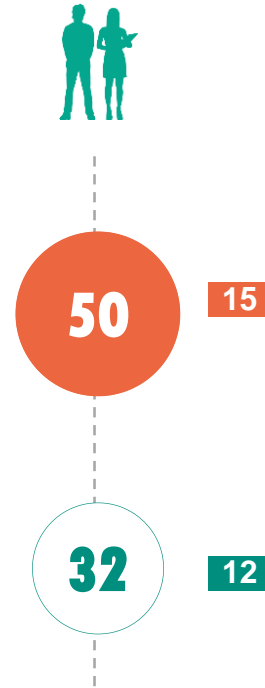
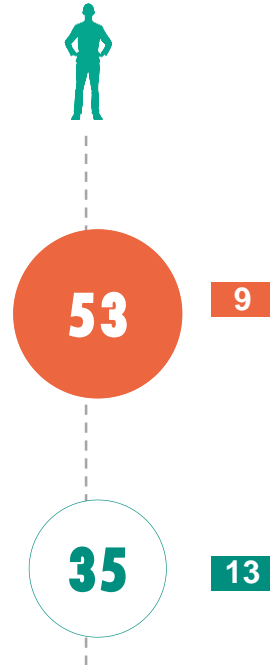
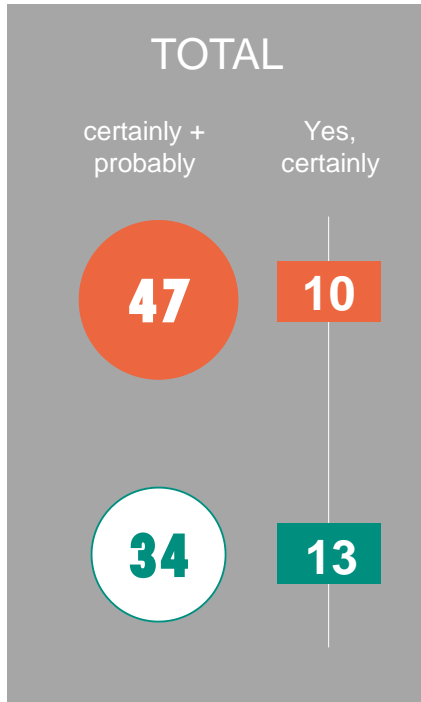
In %



Passenger cars + LCVs



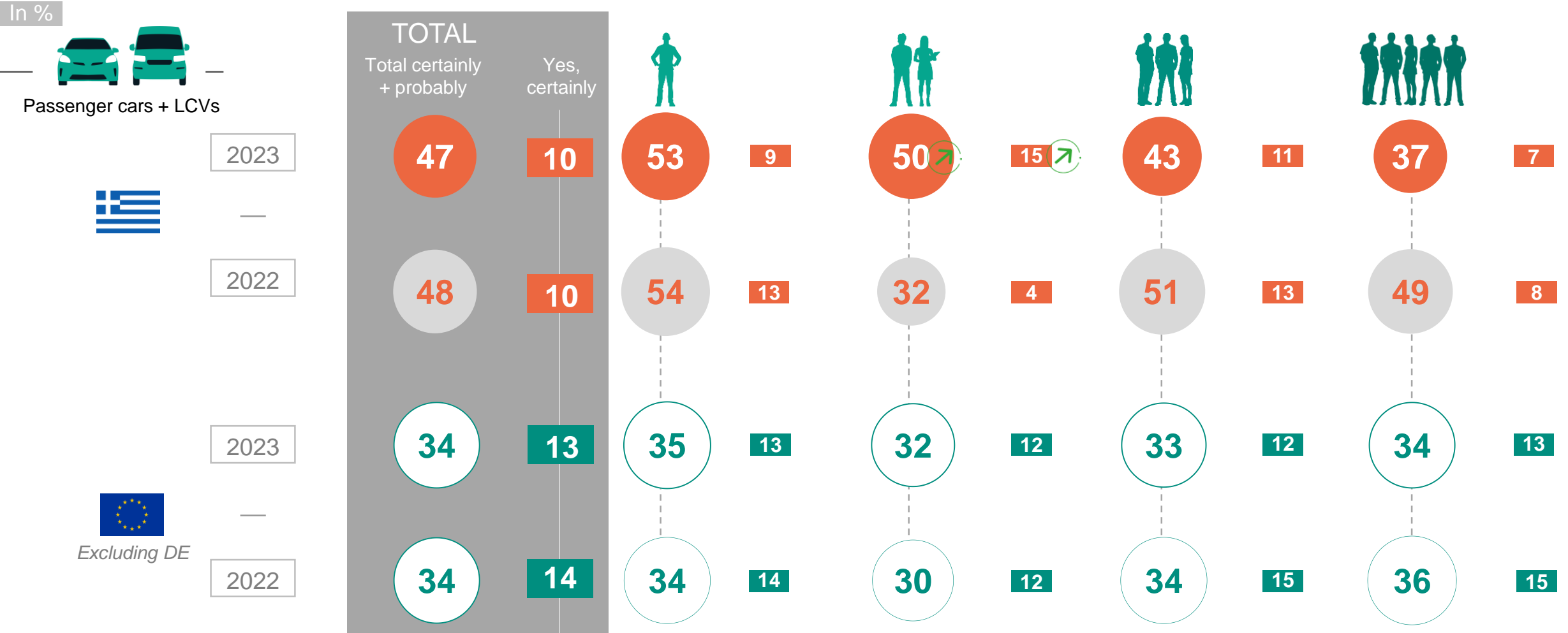
Excluding DE



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

# INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATING LEASING

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



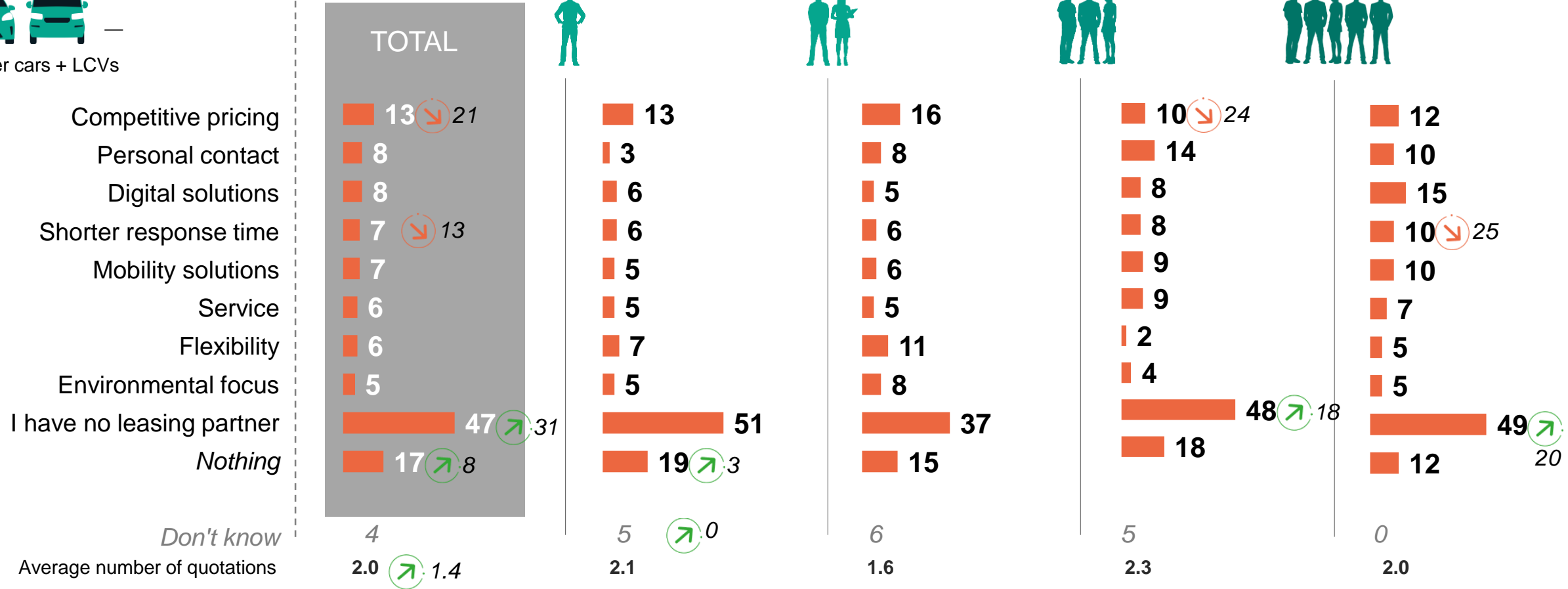
\*All countries except DE: In the next three years do you intend to introduce or increase use of Operating Lease to finance your corporate fleet?  
Basis: companies with corporate vehicles = 100%

# SERVICES MISSING FROM THE CURRENT LEASING PARTNER

In %



Passenger cars + LCVs



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

# SERVICES EXPECTED FROM A LEASING COMPANY

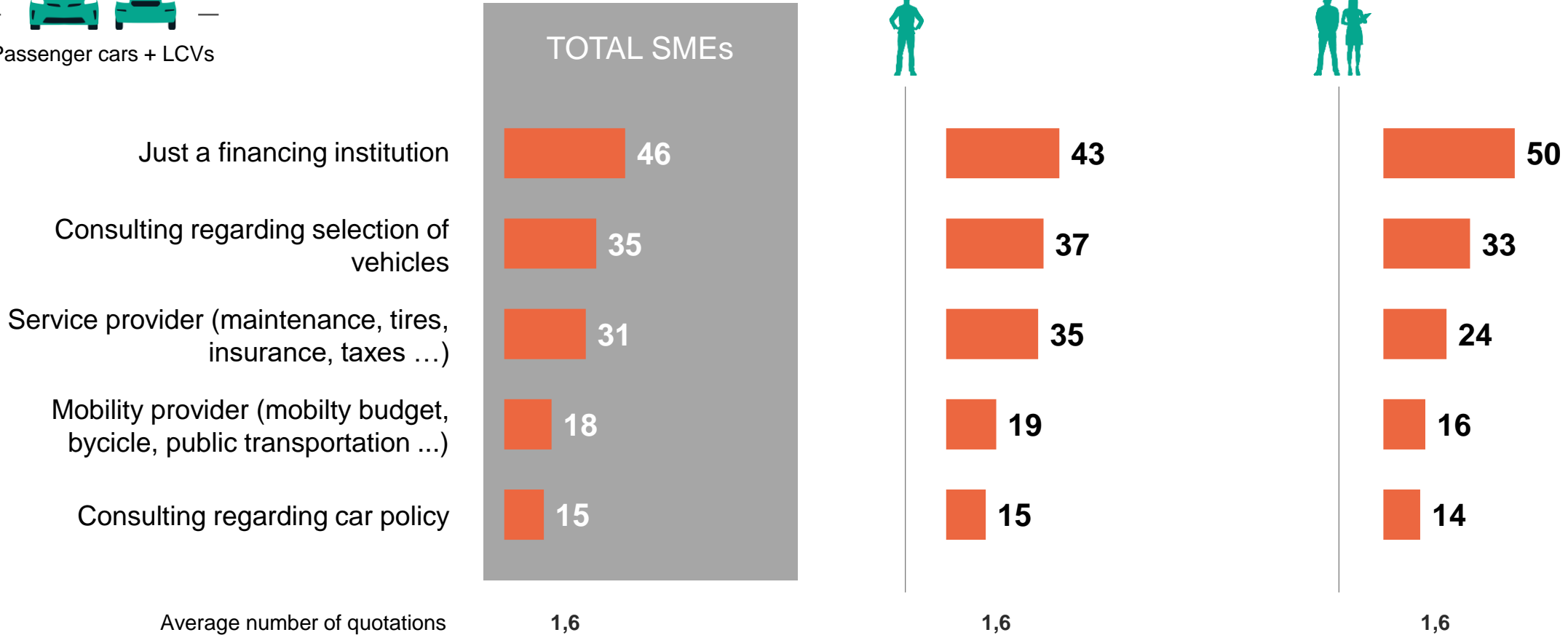


Focus 1 to 99

In %



Passenger cars + LCVs



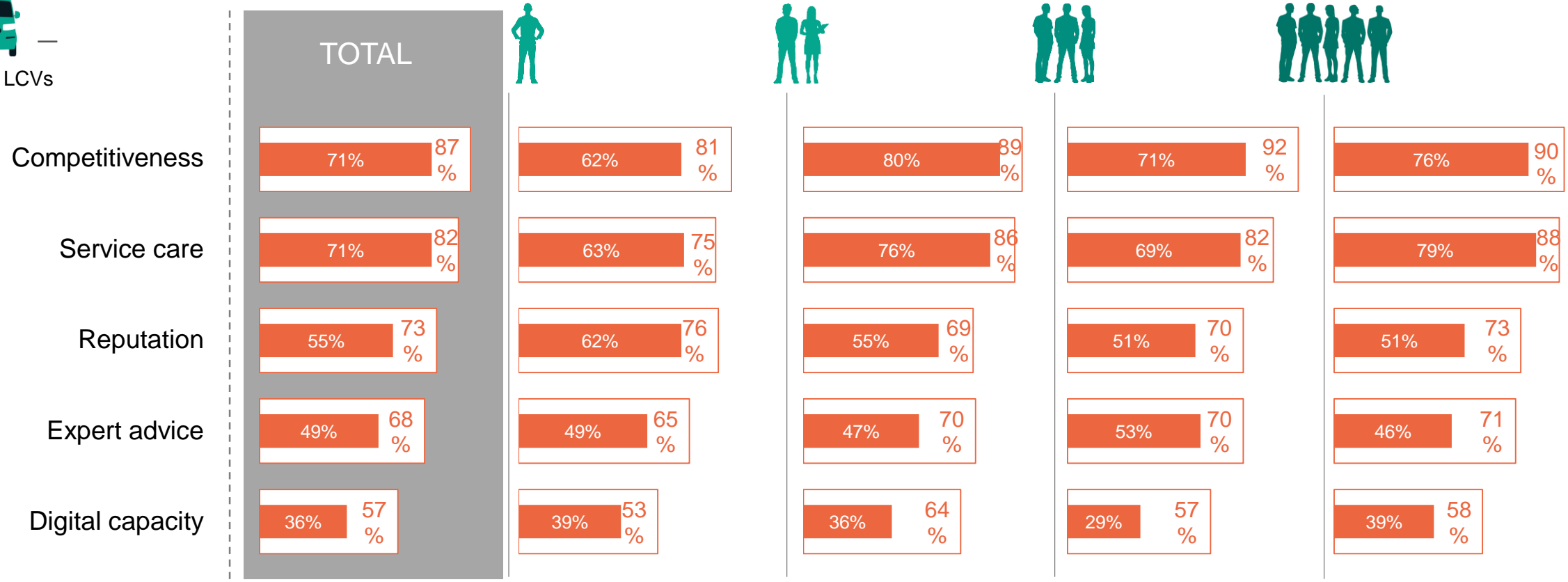
What kind of service do you expect from a leasing company?  
 Basis: companies with less than 100 employees

# CRITERIA FOR CHOOSING AN OPERATING LEASING SUPPLIER

In %



Passenger cars + LCVs



■ Very important  
 Total important (very + rather)

New question added in 2023

If you were to choose an Operating Leasing company today for your company cars, which criteria would you take into consideration in your decision?  
 Basis: companies with corporate vehicles = 100%



5

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



# A SLOWER ADOPTION OF ALTERNATIVE FUEL TECHNOLOGIES THAN IN THE REST OF EUROPE

1

- As in other European countries, **the alternative fuel technologies consideration** for passenger cars is also **progressing** among Greek companies **but remains well below the European average** (66% vs 77%).

2

For passenger cars, **Hybrid is the most used and considered technology among small companies** (41% vs 25% for Plug-in Hybrid and 100% BEV), **while Plug-in Hybrid is the most widespread among big companies** (38%).

The main reasons to adopt alternative fuel technologies mostly rely on **economical reasons** (reducing fuel expenses or interesting cost of ownership) **and on the reduction of environmental impact** (39%).

3

- Regarding LCVs fleets, Greek companies are also lagging behind European standards** : only 21% Greek companies are using or considering 100% BEV for their LCV versus 34% in Europe. The will to **be compliant with their CSR policy** is the main reason to turn towards 100% BEV for LCVs, ahead of economical and environmental reasons.

Overall, **lack of charging points whether in the public or in the private area remains a strong barrier to 100% BEV adoption**. Therefore, most Greek companies (59%) do not consider implementing this technology.

4

- Nevertheless, Greek companies anticipate to catch up with other European countries for their passenger car fleets**, with a share of petrol or diesel vehicles of 58% (vs 55% in European trend) but it will still be at a lower level for LCVs (58% vs 68% in Europe), mostly due to an increased share of Hybrid vehicles in their fleets.

5

- Lastly, hydrogen is to date absolutely not used in Greece for LCVs, and shows a weak growth potential : only 5% consider it in the next 3 years

# ENERGY MIX



**AT LEAST ONE ALTERNATIVE  
IMPLEMENTED OR CONSIDERED\***

for Passenger cars

ALREADY  
USING OR  
CONSIDER  
USING IN THE  
NEXT 3 YEARS

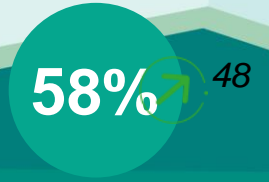


**EXPECTED PART OF 100%  
ELECTRIC PASSENGER CAR IN 3 YEARS**



**AT LEAST ONE ALTERNATIVE  
IMPLEMENTED**

for Passenger cars



**EXPECTED PART OF 100%  
ELECTRIC LCV IN 3 YEARS**



\*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)

In %



Passenger cars

## HOW TO READ THE RESULTS ?

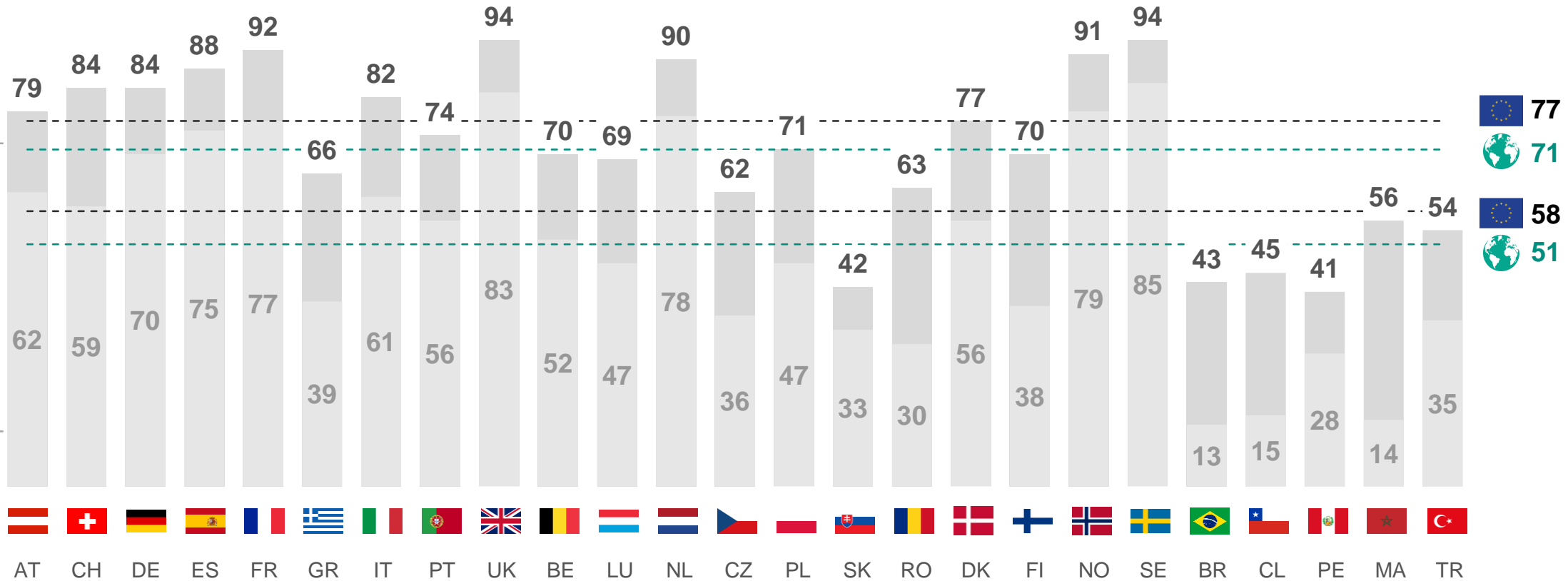
In Greece, 66% of the companies are already using or consider to implement at least one alternative technology in the next 3 years. 39% of the companies is currently using at least one.



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 passenger cars**

# CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

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

In %

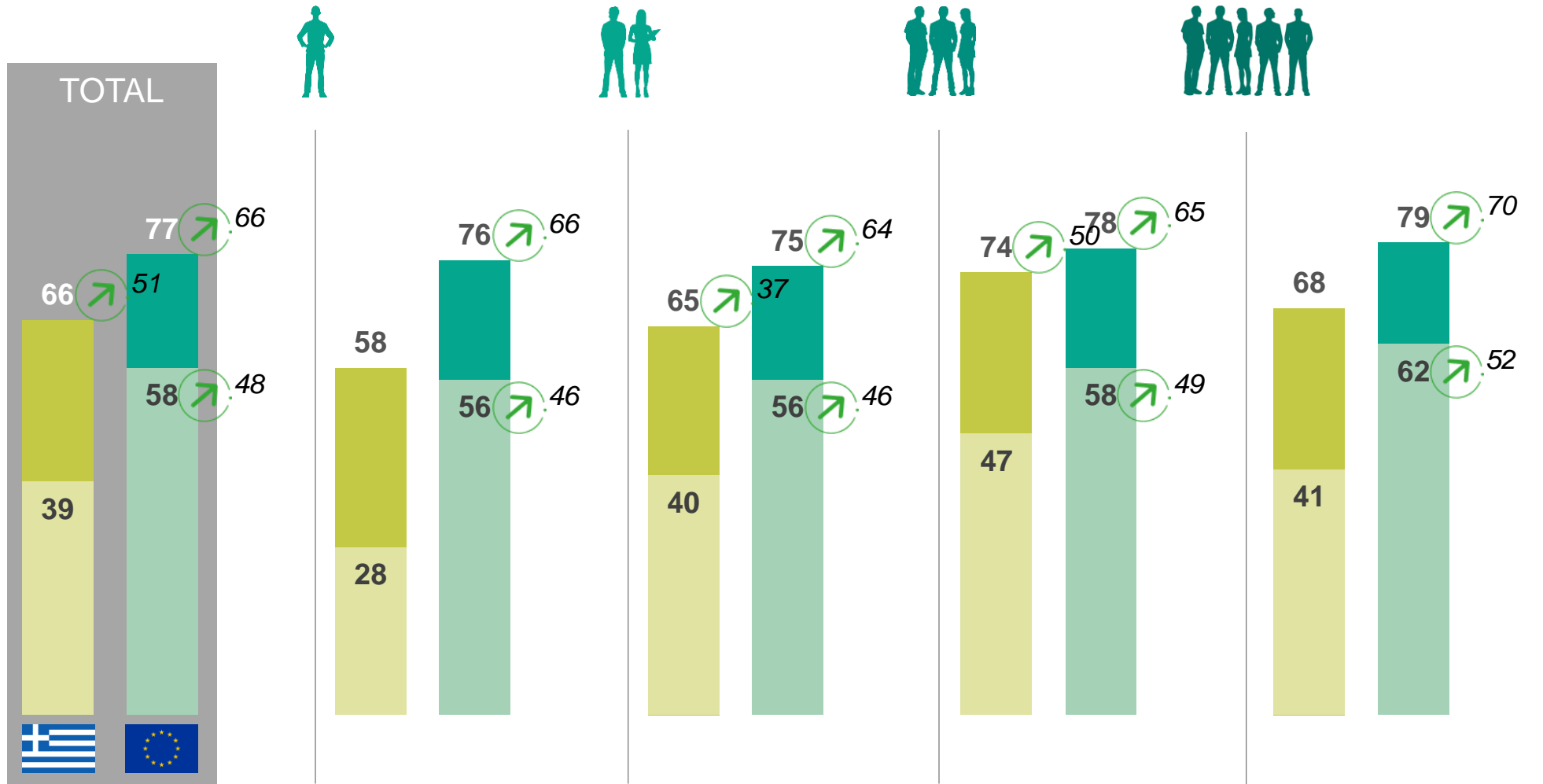
Passenger cars



ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS



ALREADY USING



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

# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years

In %



Passenger cars



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



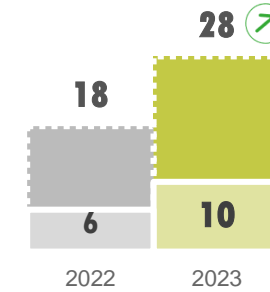
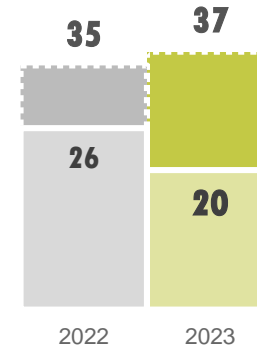
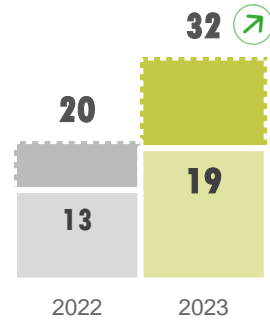
ALREADY  
USING



Plug-in Hybrid

Hybrid

100% Battery  
Electric Vehicle



37	44
24	29

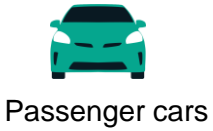
38	44
26	29

34	40
19	24

# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

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

In %



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



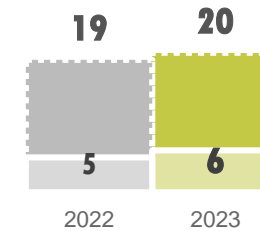
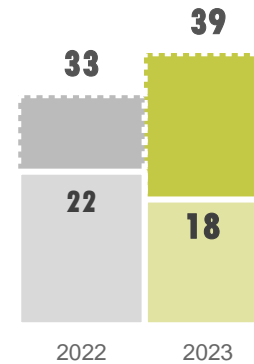
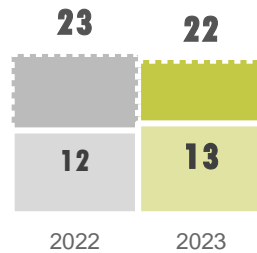
ALREADY  
USING



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

Plug-in Hybrid

Hybrid

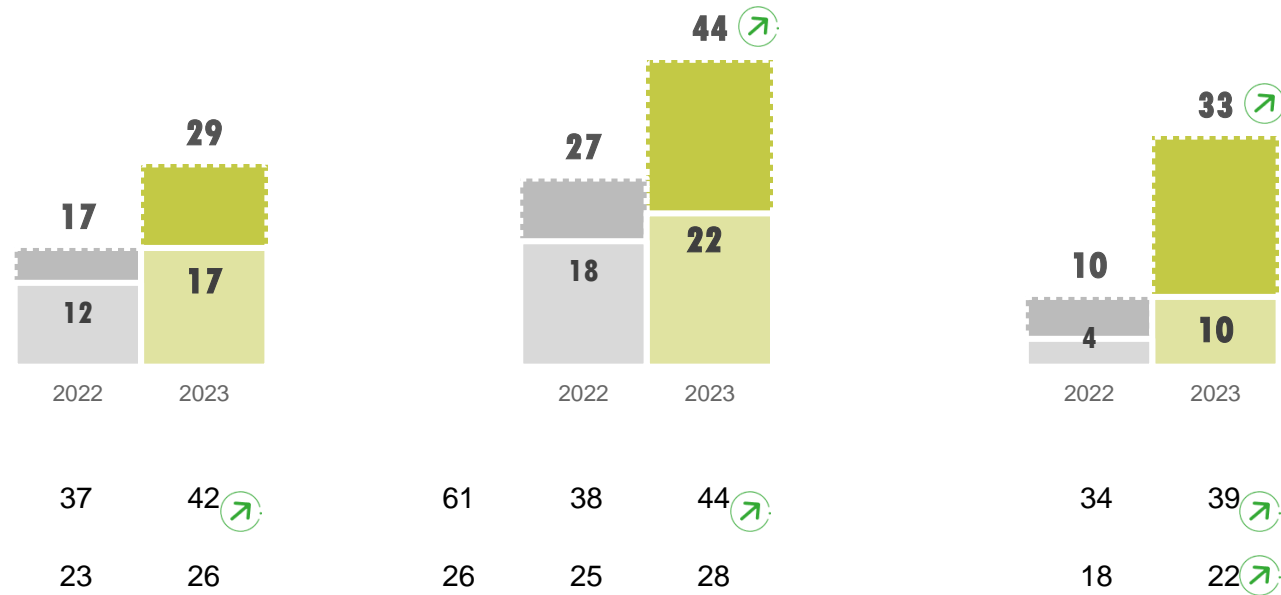
100% Battery Electric Vehicle



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING





# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

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

In %



Passenger cars



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



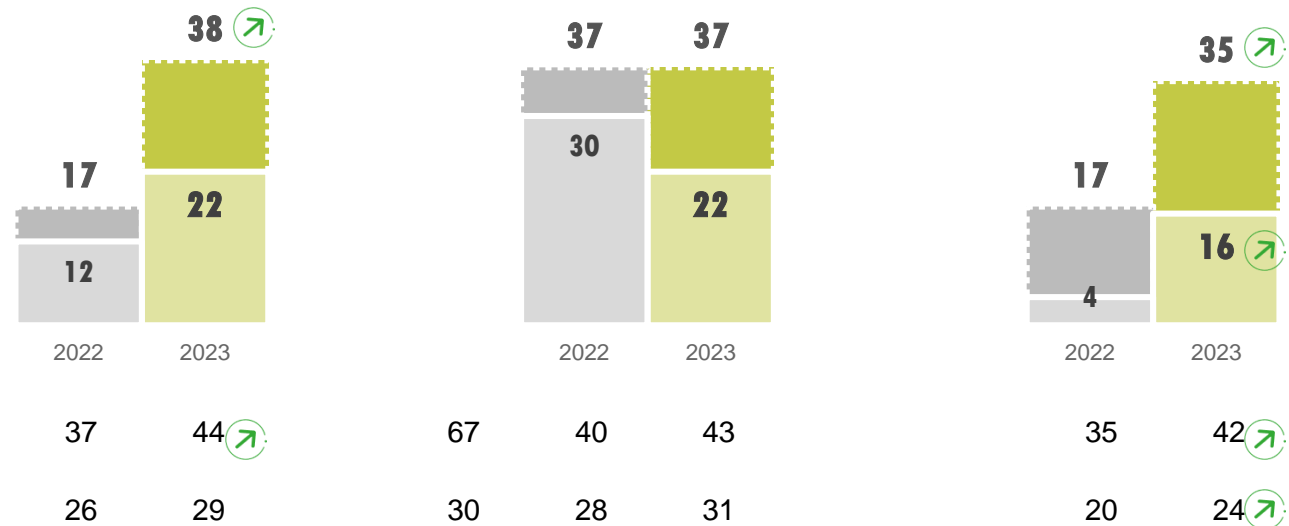
ALREADY  
USING



Plug-in Hybrid

Hybrid

100% Battery  
Electric Vehicle



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



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



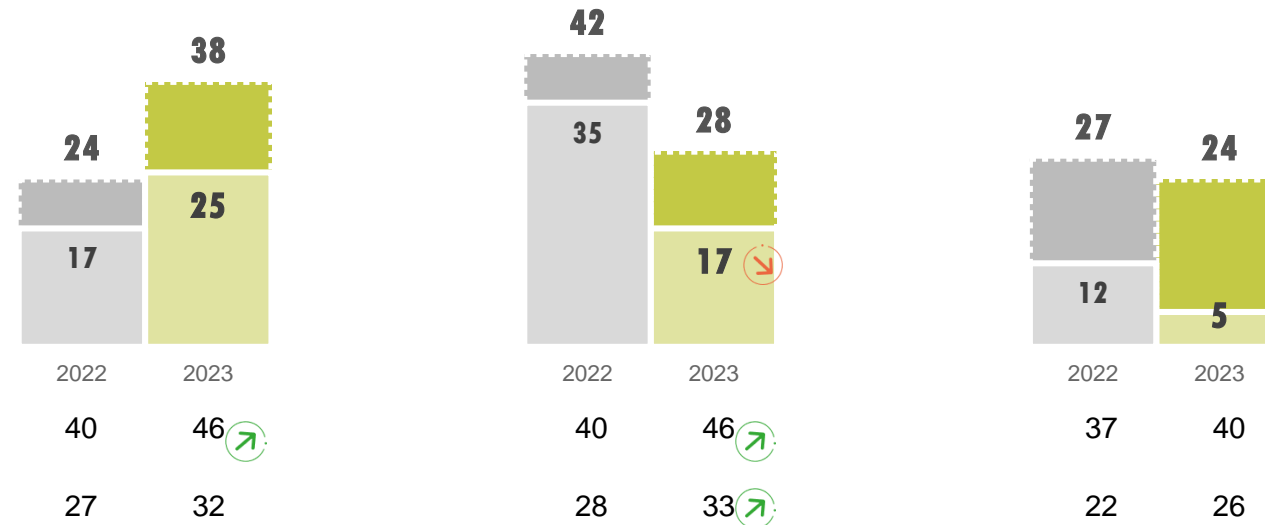
ALREADY  
USING



Plug-in Hybrid

Hybrid

100% Battery  
Electric Vehicle



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



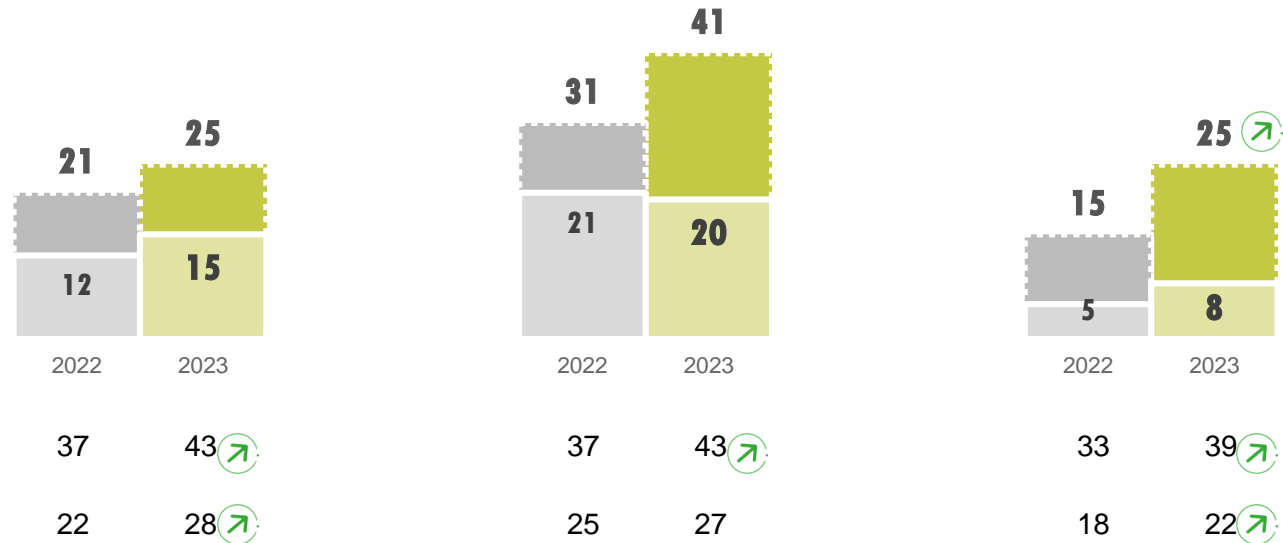
ALREADY  
USING



Plug-in Hybrid

Hybrid

100% Battery  
Electric Vehicle



*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 %



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



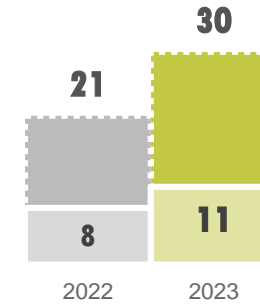
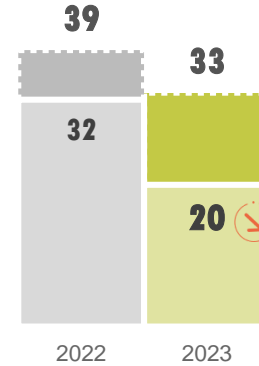
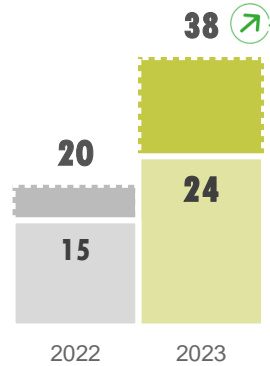
ALREADY  
USING



Plug-in Hybrid

Hybrid

100% Battery  
Electric Vehicle



Year	Already Using	Already Using or Considering Using in the Next 3 Years
2022	38	38
2023	45	45

Year	Already Using	Already Using or Considering Using in the Next 3 Years
2022	40	40
2023	45	45

Year	Already Using	Already Using or Considering Using in the Next 3 Years
2022	21	21
2023	25	25

# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

## Passenger car fleet

In %



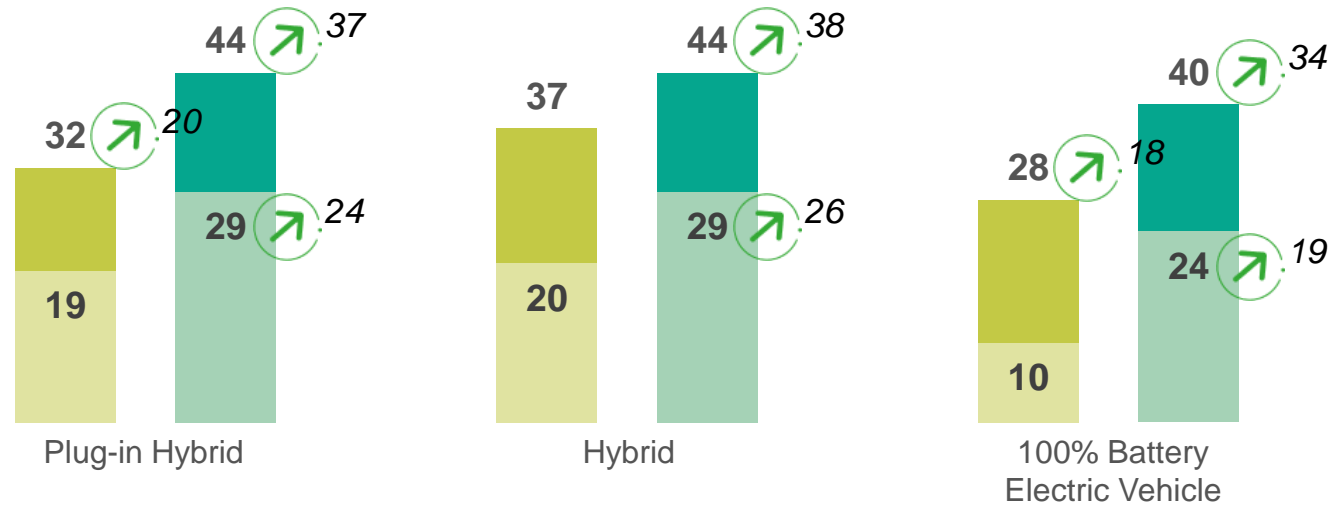
Passenger cars



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING



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**

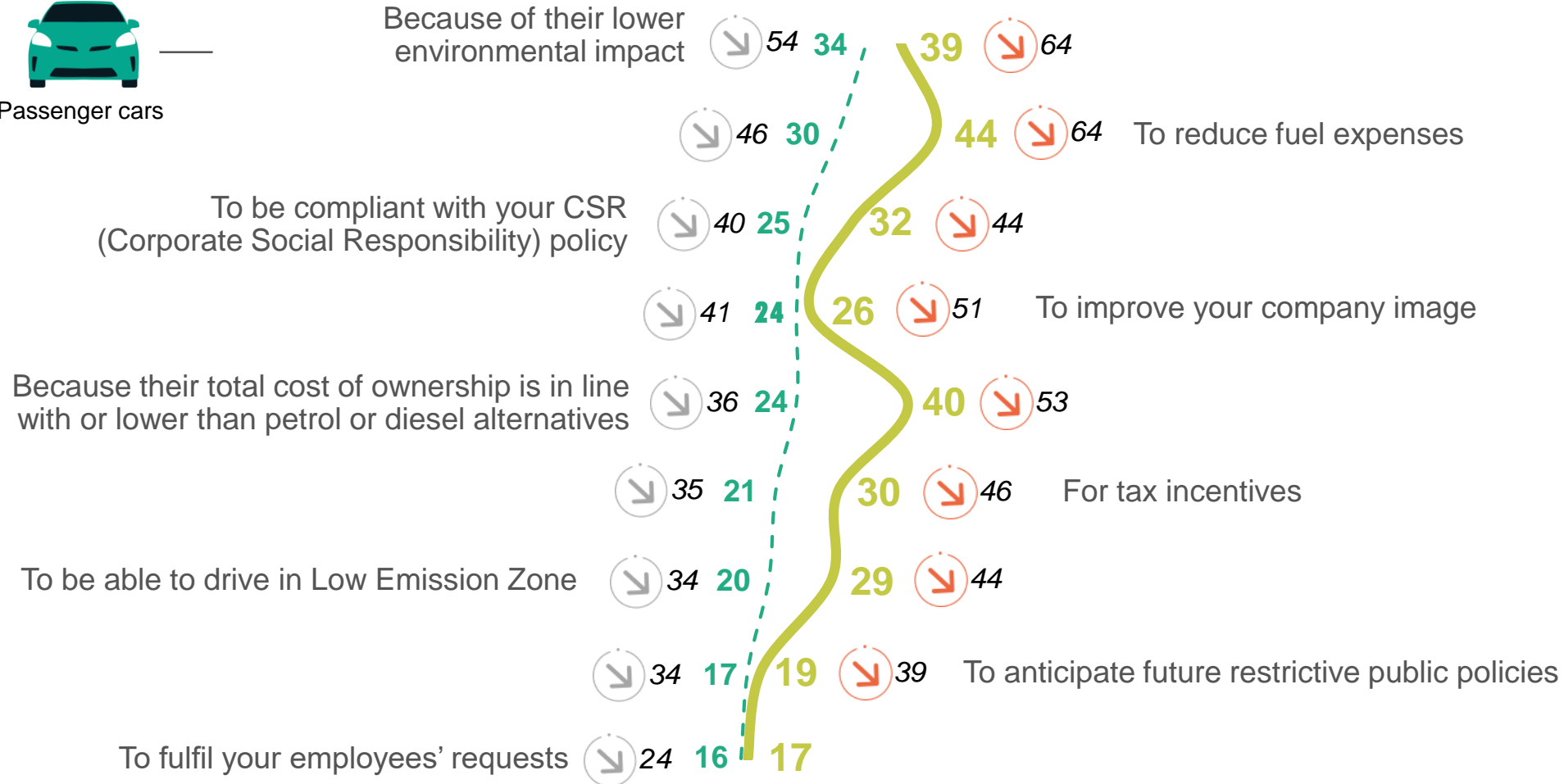
# REASONS FOR IMPLEMENTING OR CONSIDERING ALTERNATIVE FUEL TECHNOLOGIES

## 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

# CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

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

In %



LCVs

## HOW TO READ THE RESULTS ?

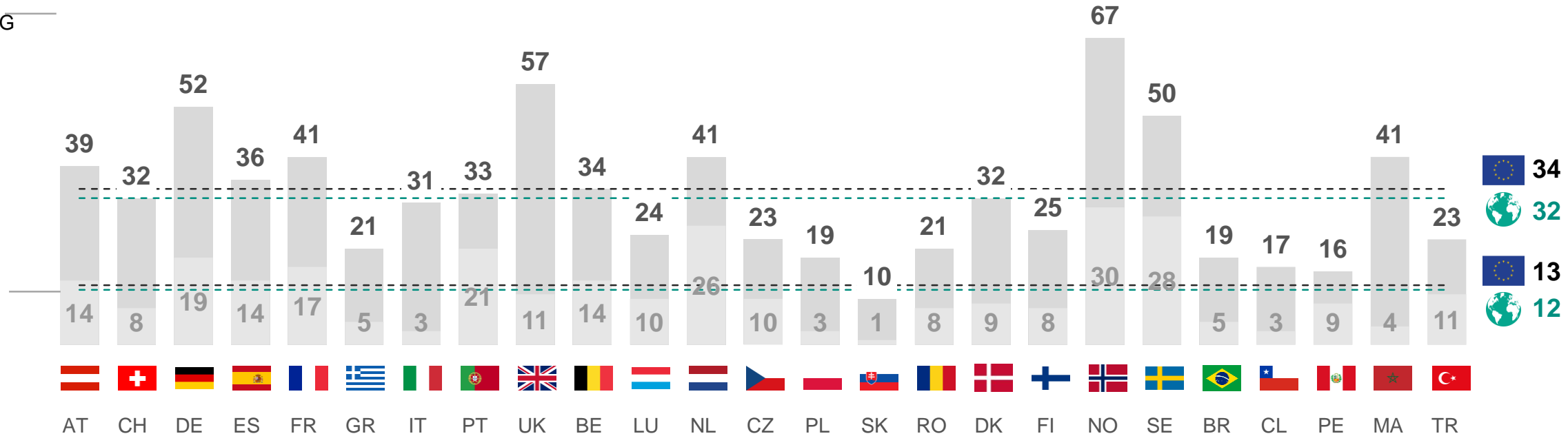
In Greece, 21% of the companies are already using or consider to implement at least one alternative technology in the next 3 years. 5% of the companies is currently using at least one.



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)

In %



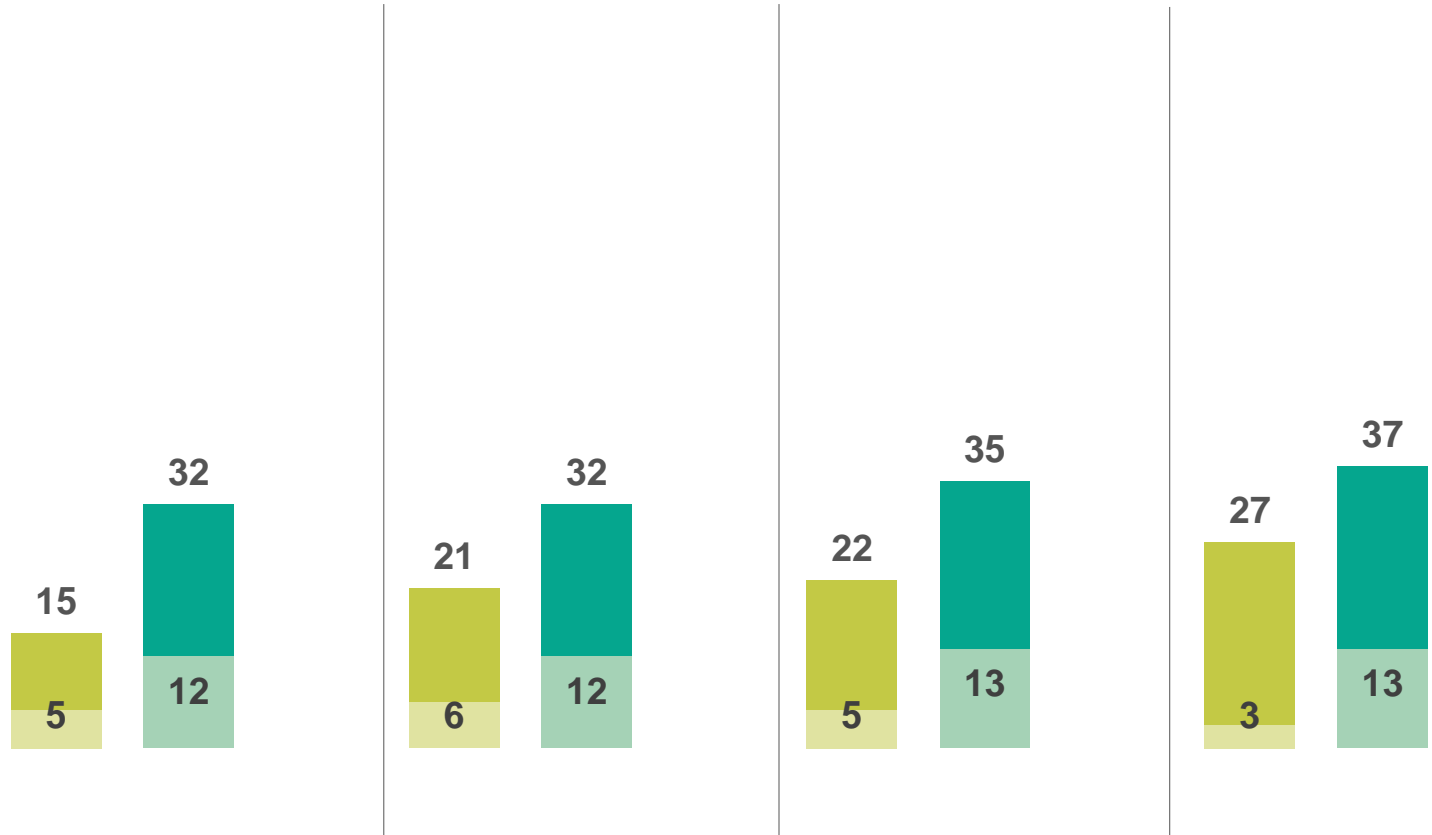
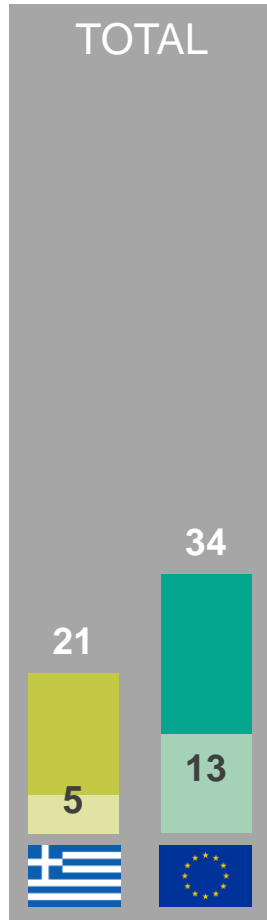
LCVs



ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS



ALREADY USING



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



# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years

In %



LCVs

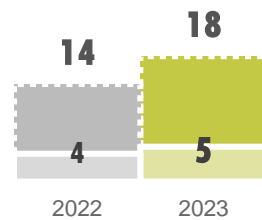
100% Battery  
Electric Vehicle



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.

In %



LCVs

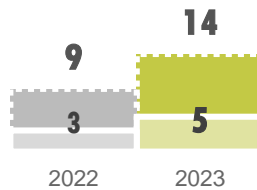
100% Battery  
Electric Vehicle



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING



24	28 ↗
7	11 ↗

# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years – 10 - 99 empl.

In %



LCVs

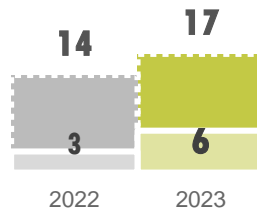
100% Battery  
Electric Vehicle



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING



2022 2023



23 27  
7 10 ↗

# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years – 100 - 249 empl.

In %



LCVs

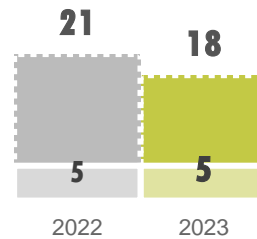
100% Battery  
Electric Vehicle



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING



26	30
9	12 

# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years – 250 empl. or more

In %



LCVs

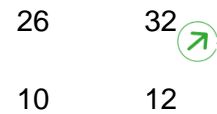
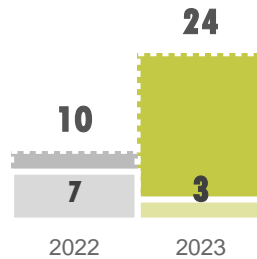


ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING

100% Battery  
Electric Vehicle



# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years – Focus on 1 to 99

In %

100% Battery  
Electric Vehicle



LCVs



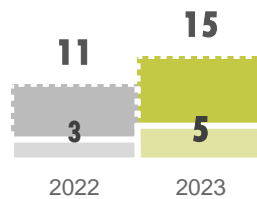
ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



+



ALREADY  
USING



23

27



7

11

# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Evolution vs. previous years – Focus on 100 and more

In %



LCVs

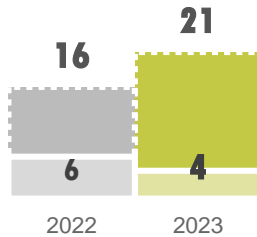
100% Battery  
Electric Vehicle



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING



26	31
9	12

# ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY\*

## LCV Fleet

In %



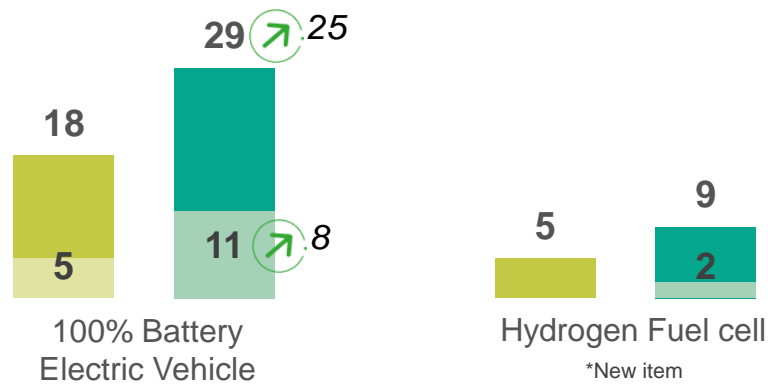
LCVs



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**



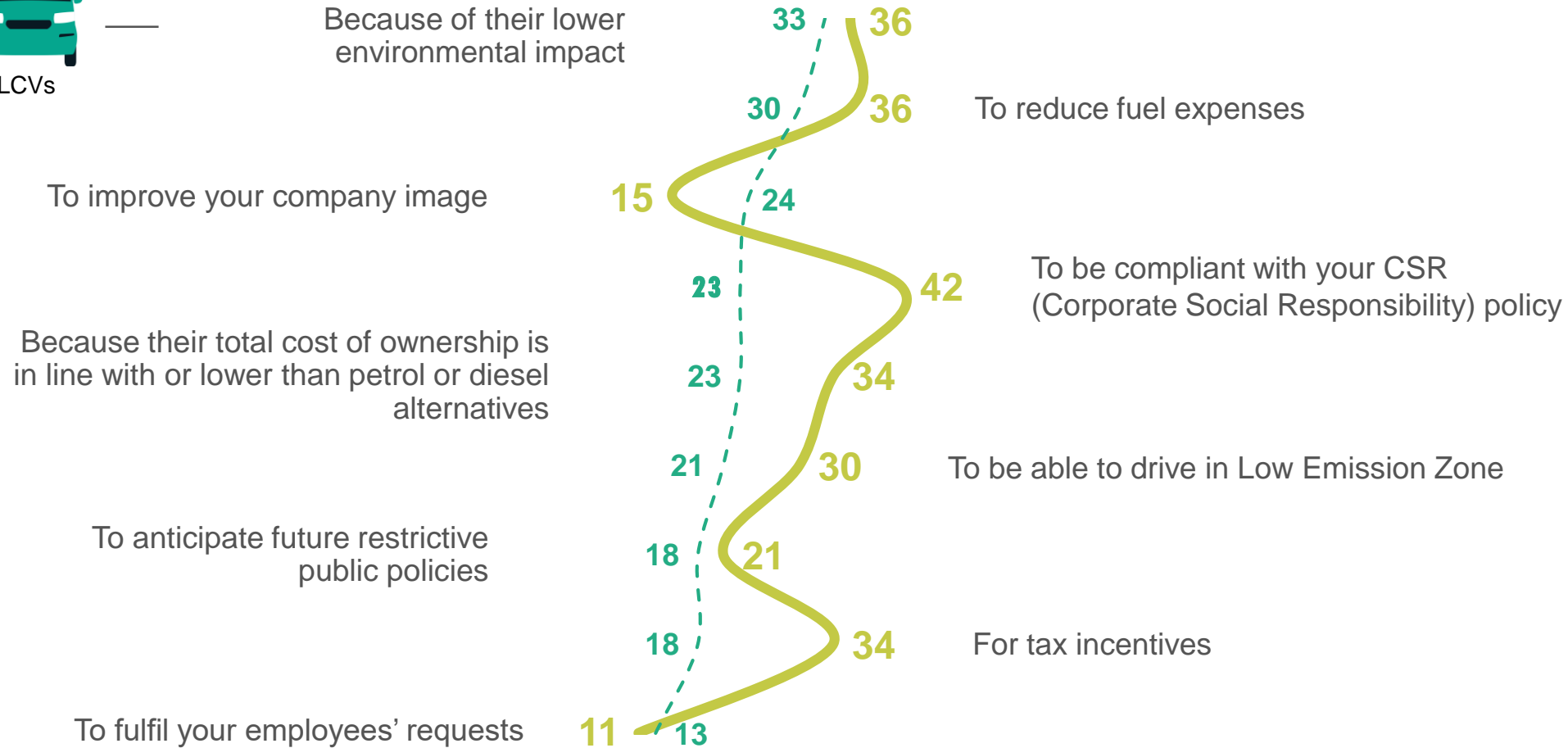
# REASONS FOR IMPLEMENTING OR CONSIDERING ALTERNATIVE FUEL TECHNOLOGIES

LCV fleet

In %



LCVs



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

# EXPECTED FLEET SHARE PER ENERGY

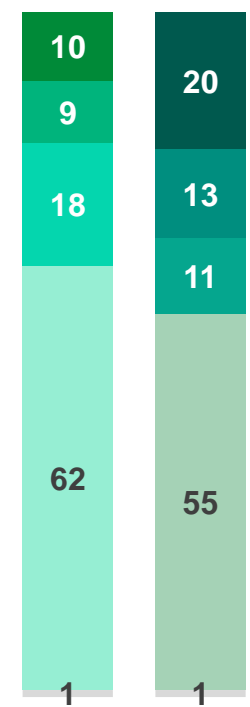
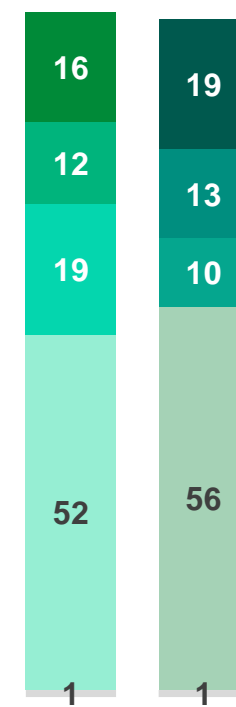
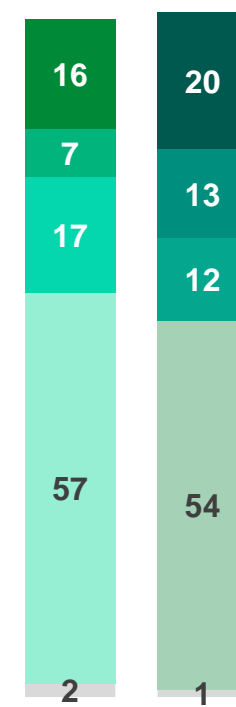
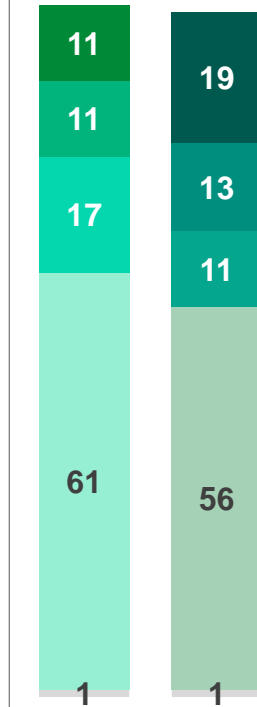
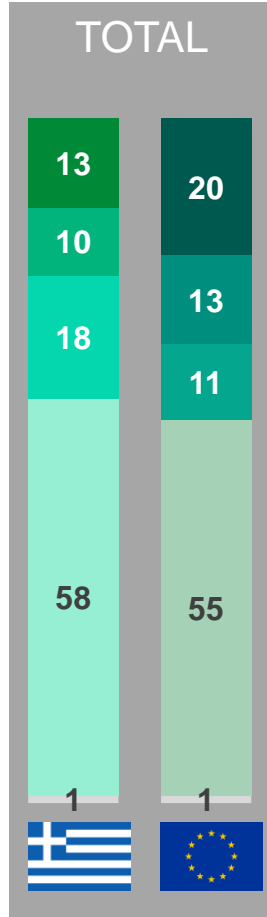
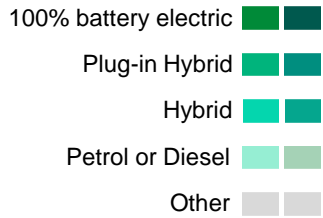
## HOW TO READ THE RESULTS ?

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

In %



Passenger cars



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

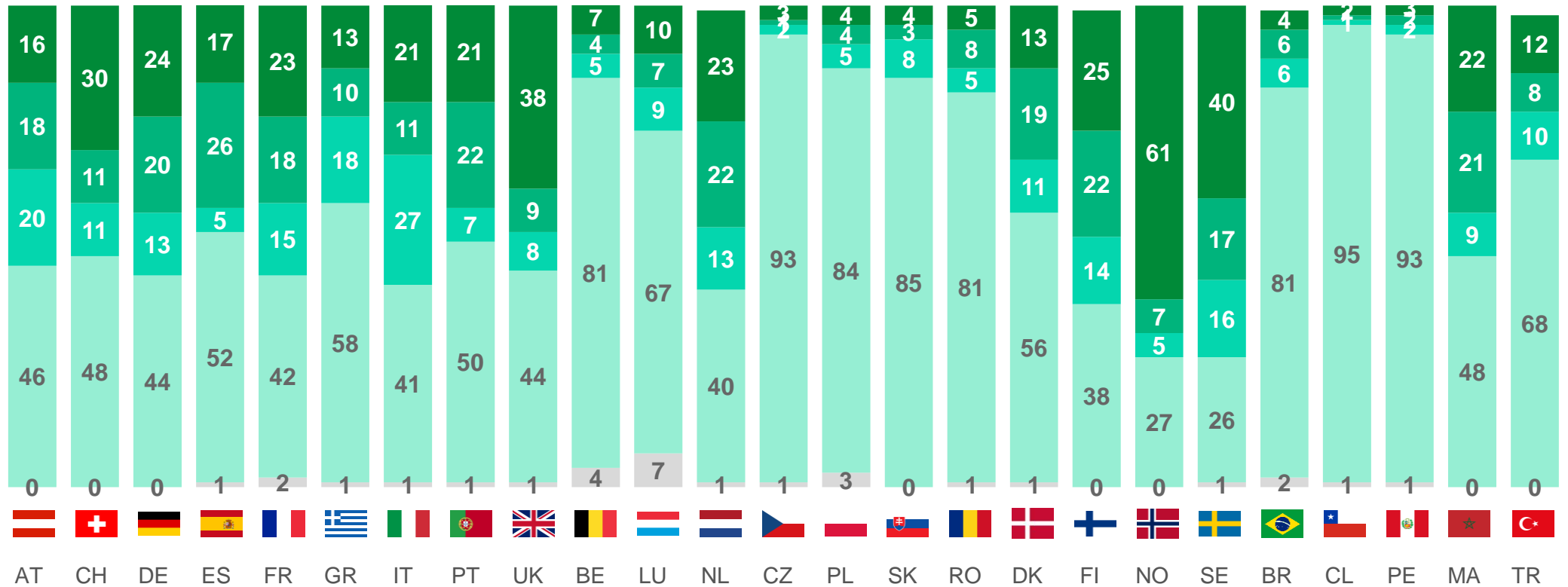
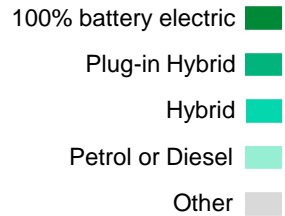
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In Greece in 3 years, 13% of the companies passenger car fleet will be 100% BEV.

In %



Passenger cars



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 %

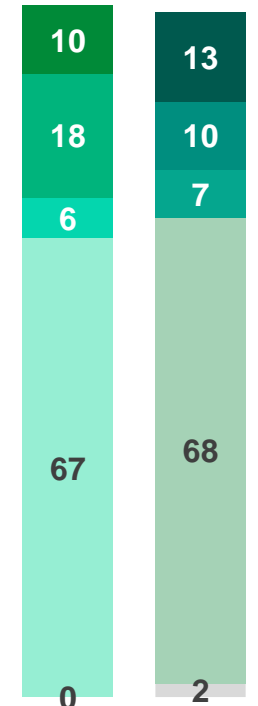
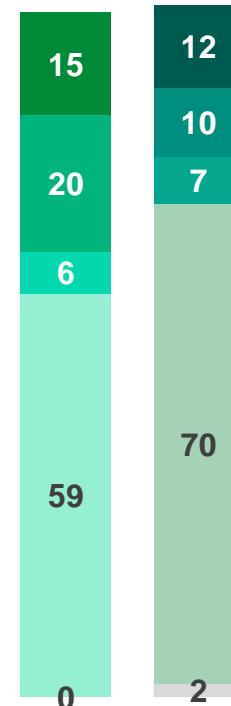
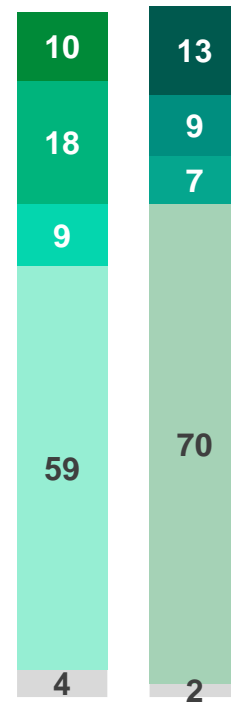
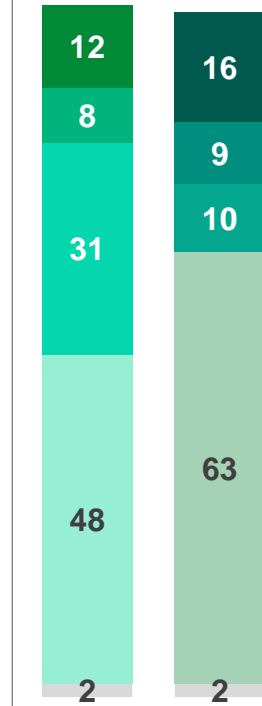
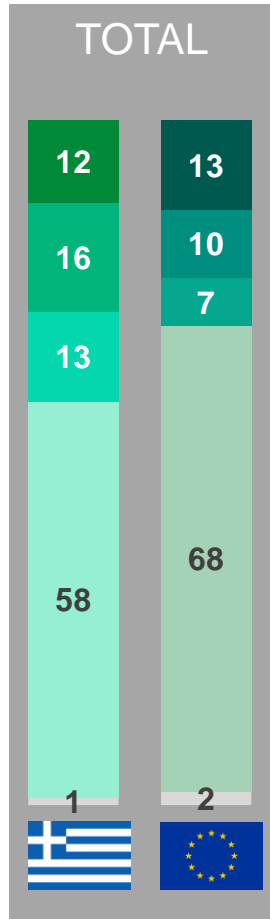


LCVs

## HOW TO READ THE RESULTS ?

In Greece in 3 years, 12% 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

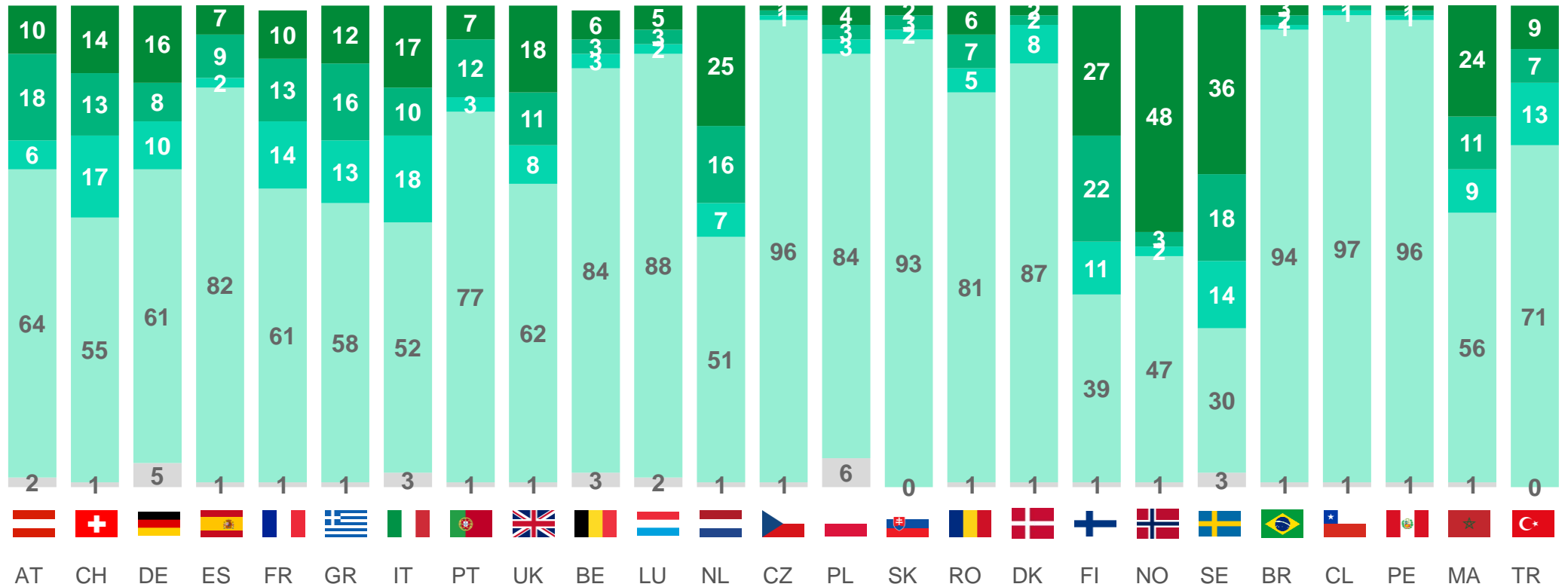
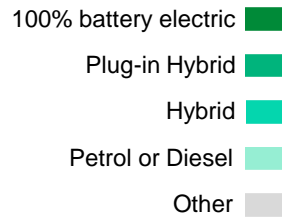
## HOW TO READ THE RESULTS ?

In Greece in 3 years, 12% of the light commercial vehicle fleet will be 100% BEV.

In %



LCVs



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

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

Basis: companies with LCVs

5

# ENERGY MIX FOCUS PER ALTERNATIVE TECHNOLOGY



# HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %



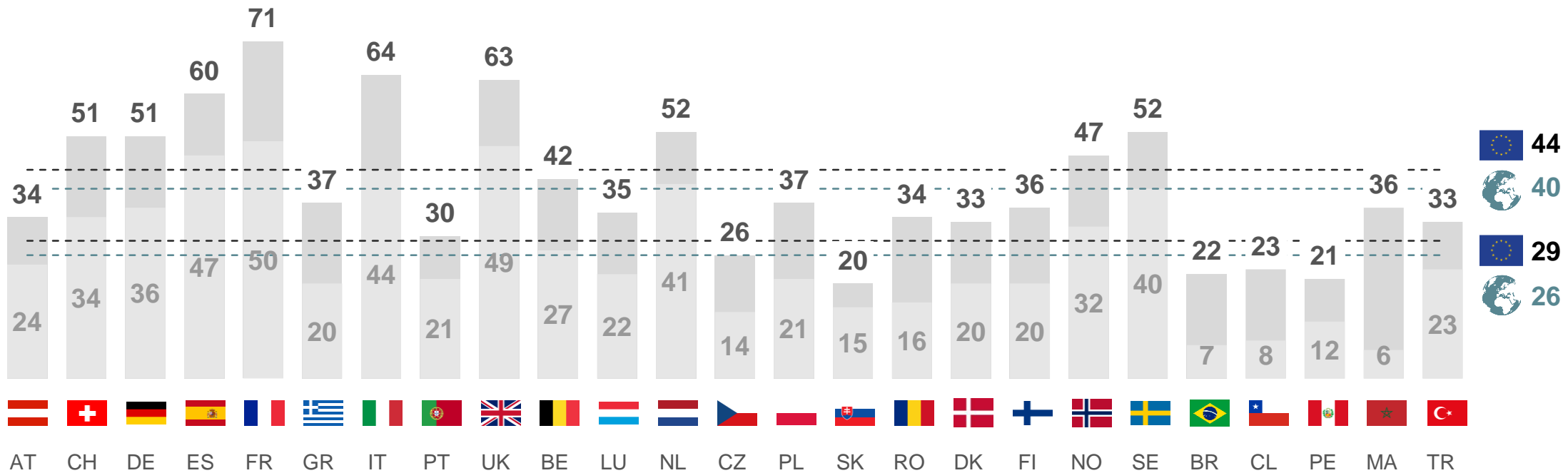
Passenger cars



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING



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

# HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %

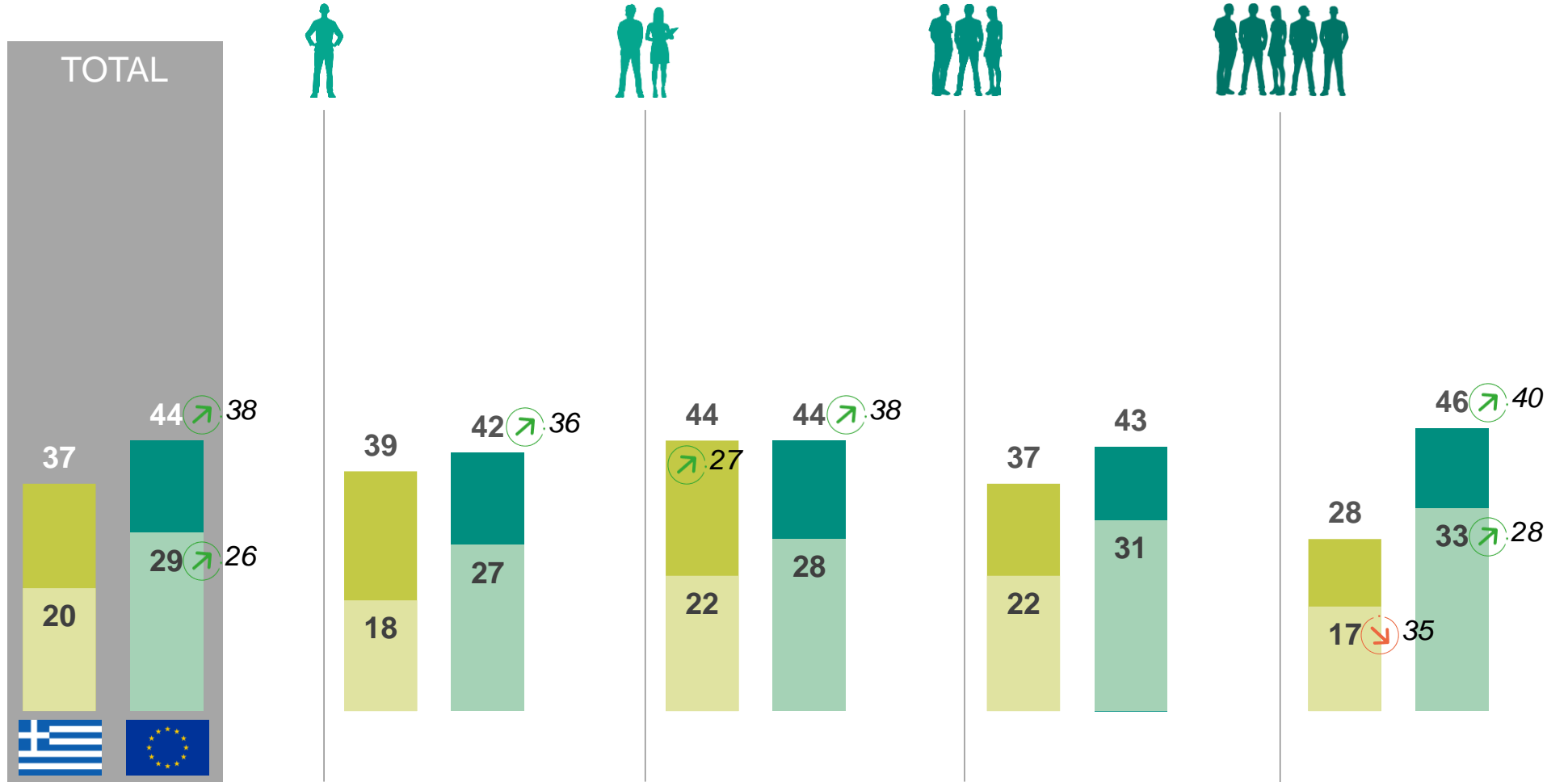
Passenger cars



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING



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

**Basis: companies with passenger cars**



# PLUG-IN HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %



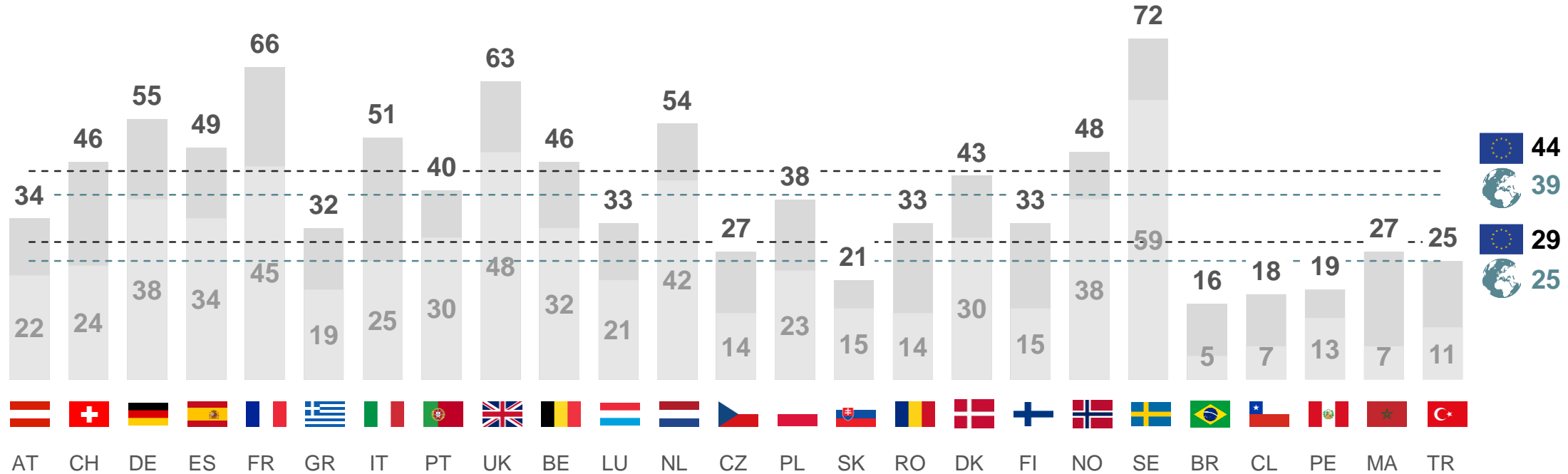
Passenger cars



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING



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

**Basis: companies with passenger cars**

# PLUG-IN HYBRID: IMPLEMENTATION WITHIN COMPANY FLEET POLICY

In %

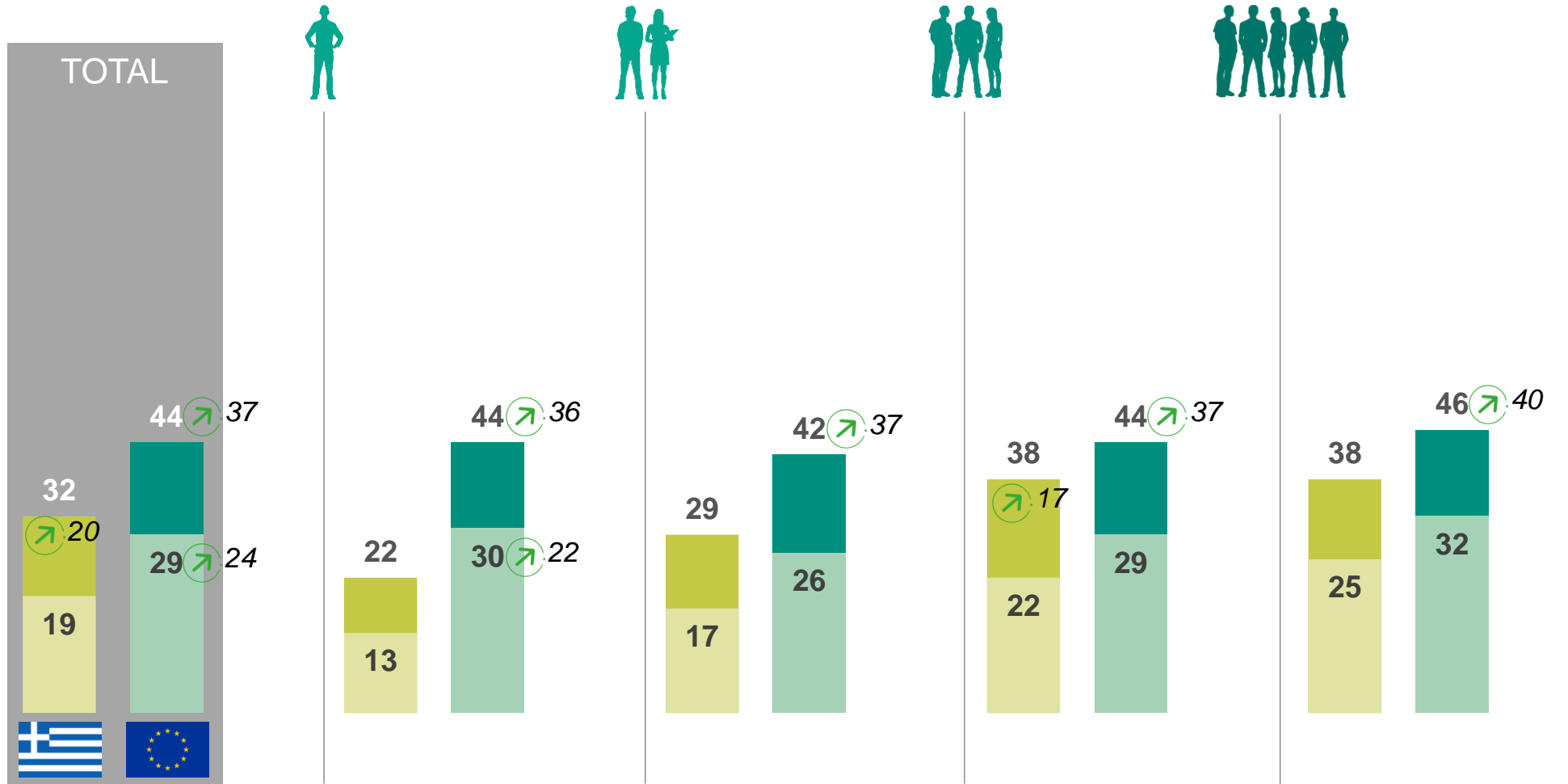
Passenger cars



ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS



ALREADY USING



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

**Basis: companies with passenger cars**

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

In %



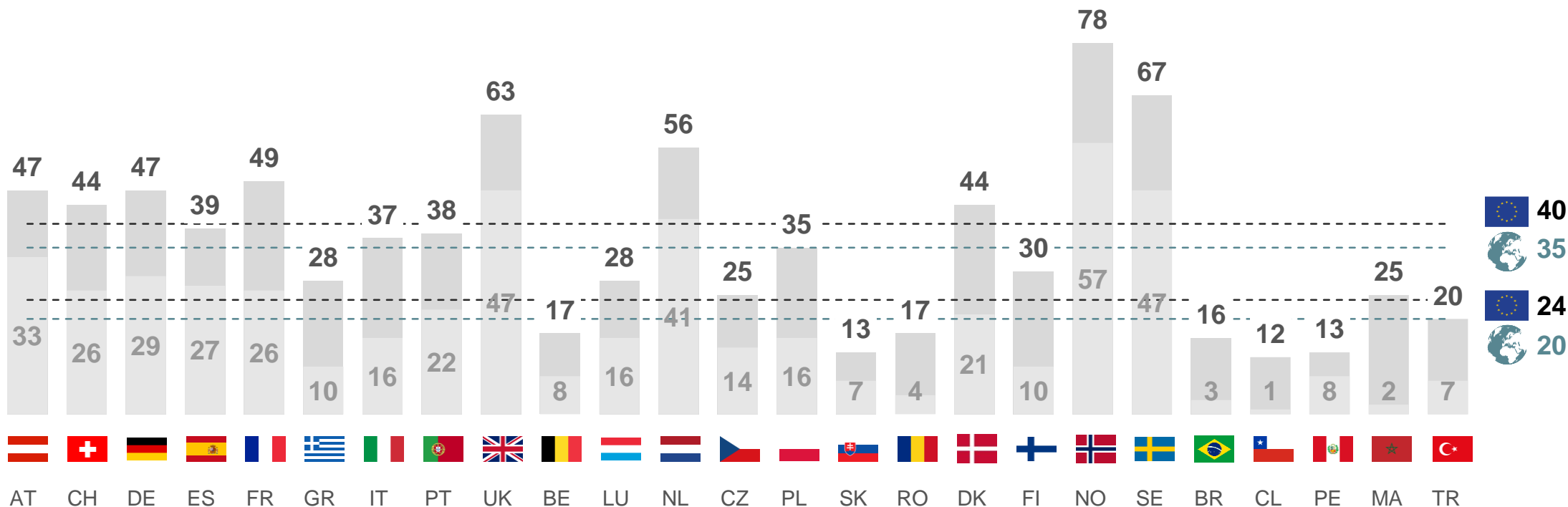
Passenger cars



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING



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

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

In %

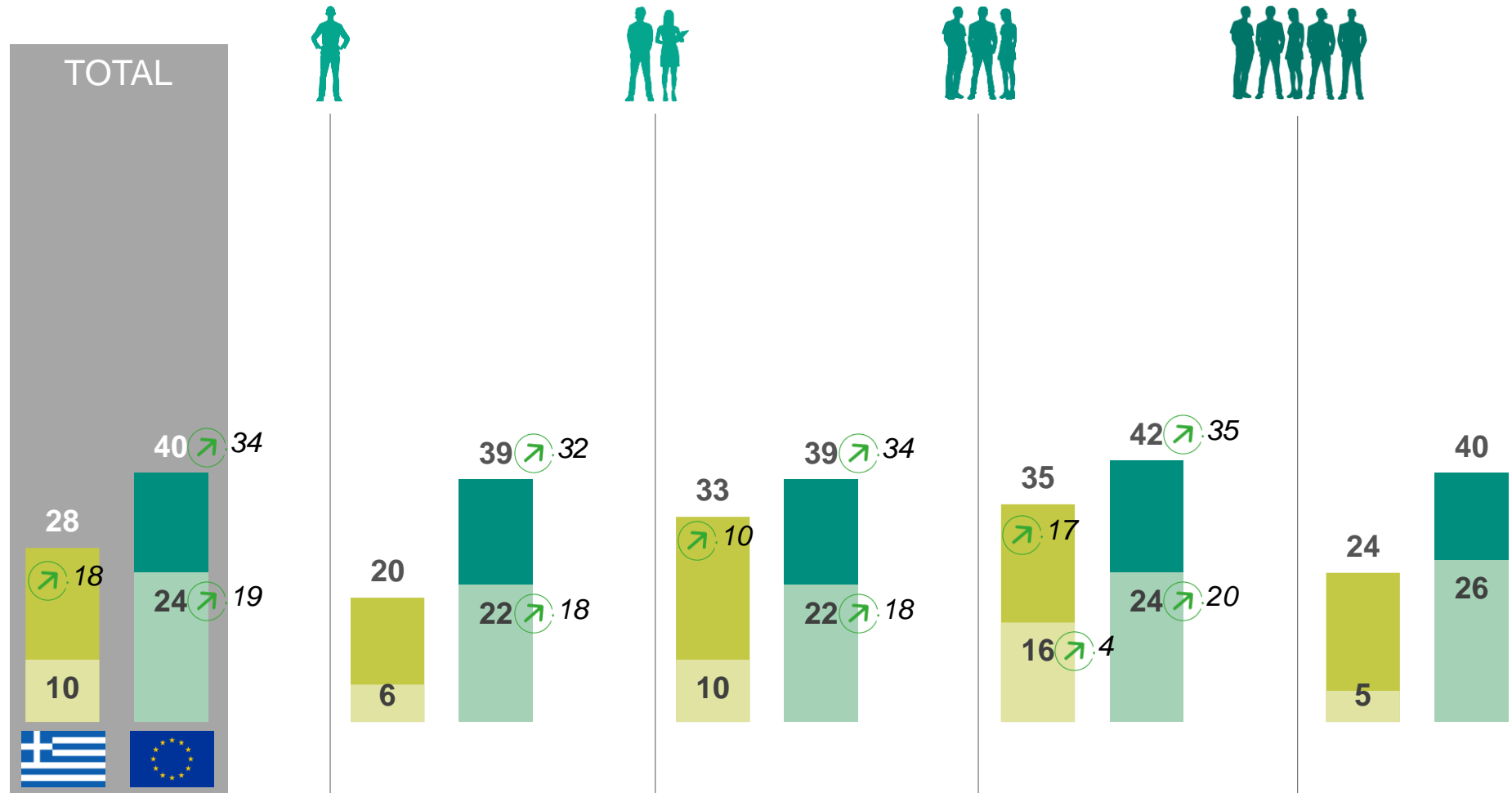
Passenger cars



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING



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

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

In %



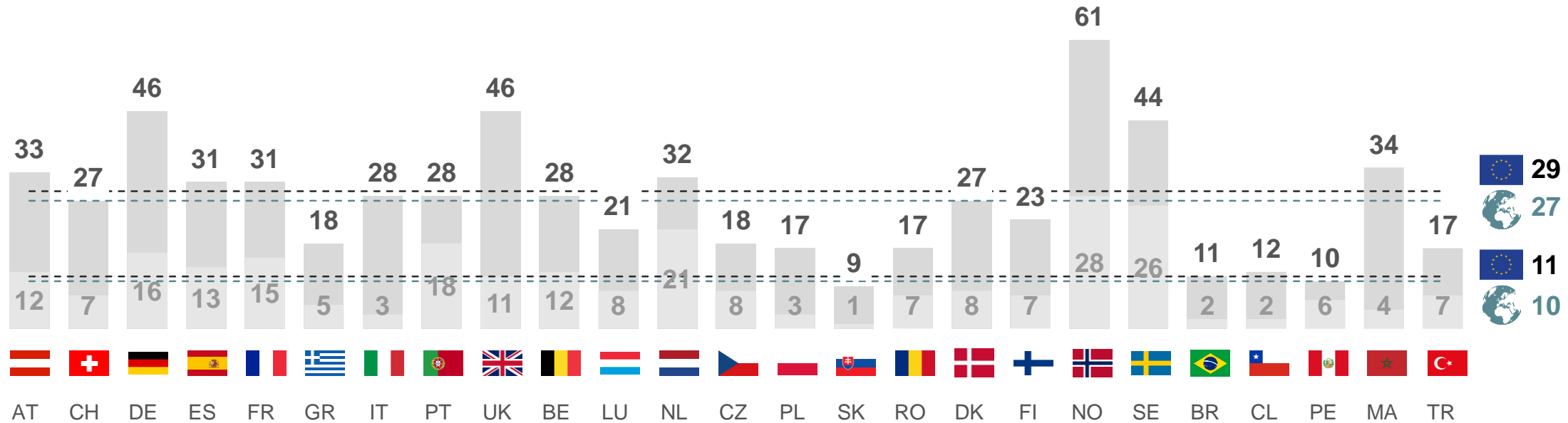
LCVs



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING



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

Basis: companies with LCVs

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

In %



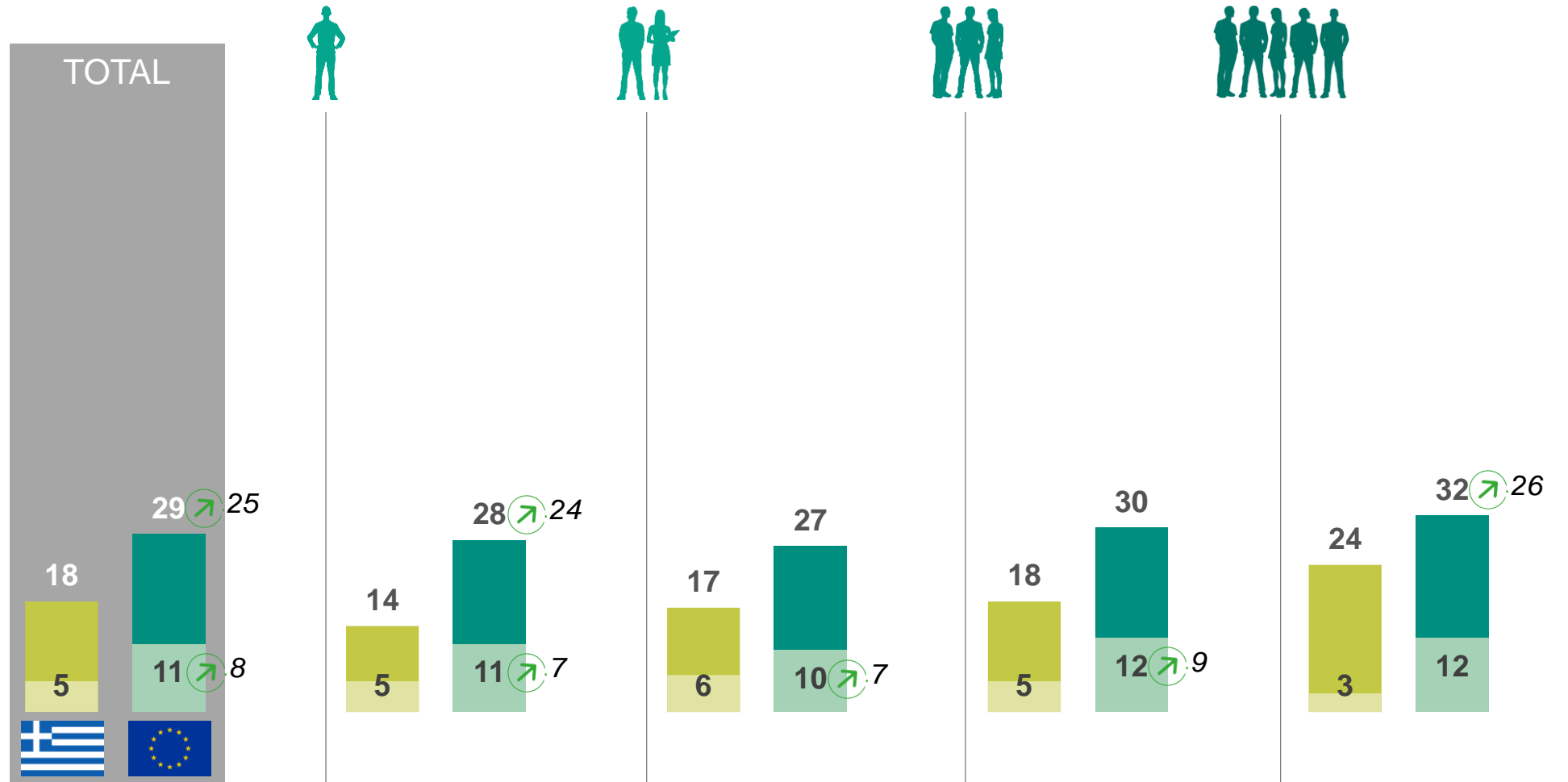
LCVs



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING



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

**Basis: companies with LCVs**

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

In %



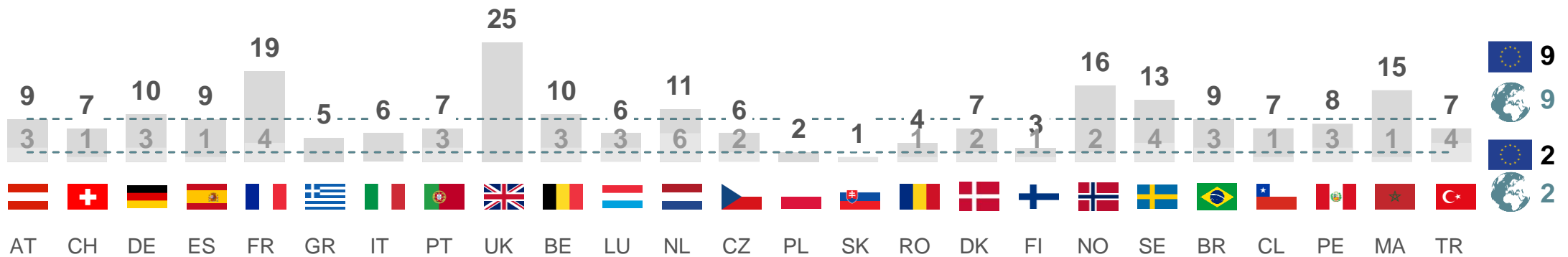
LCVs



ALREADY USING  
OR CONSIDER  
USING IN THE  
NEXT 3 YEARS



ALREADY  
USING

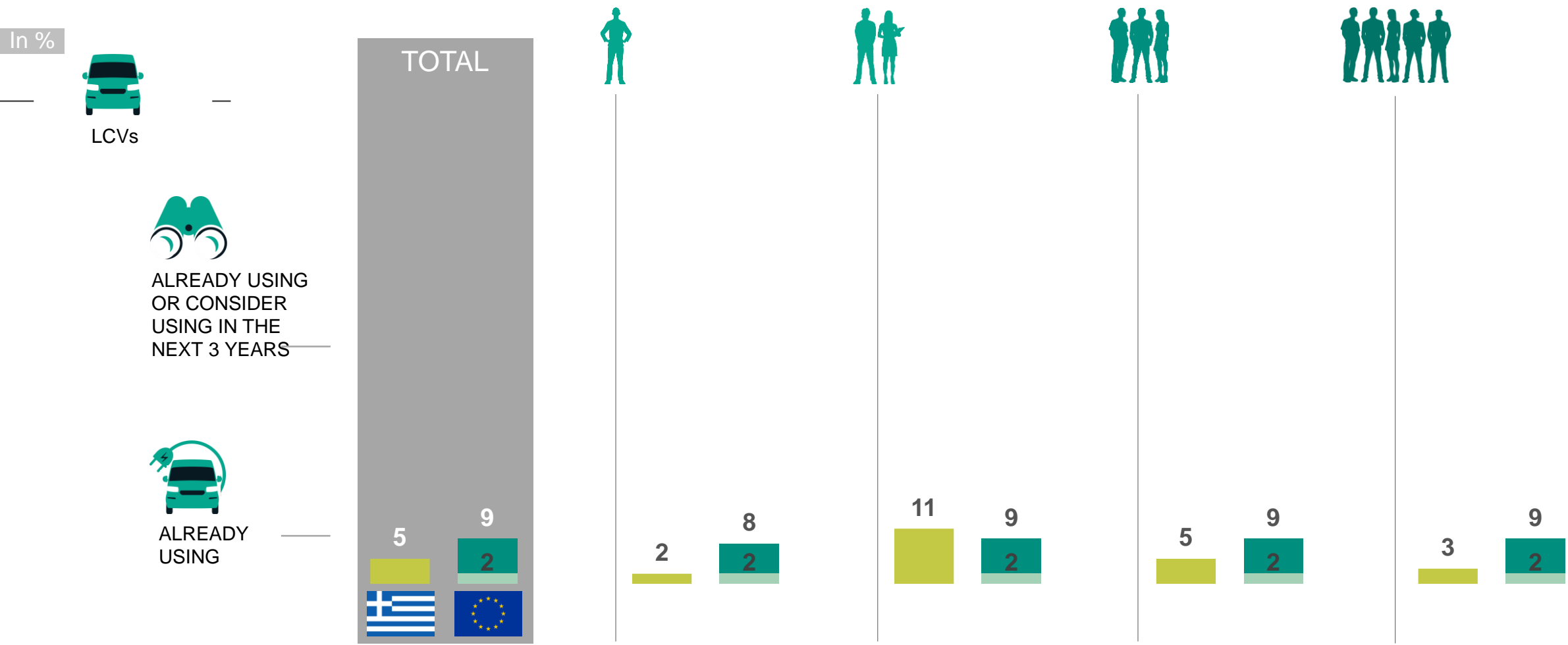


New item added in 2023

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

Basis: companies with LCVs

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



New item added in 2023

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

Basis: companies with LCVs

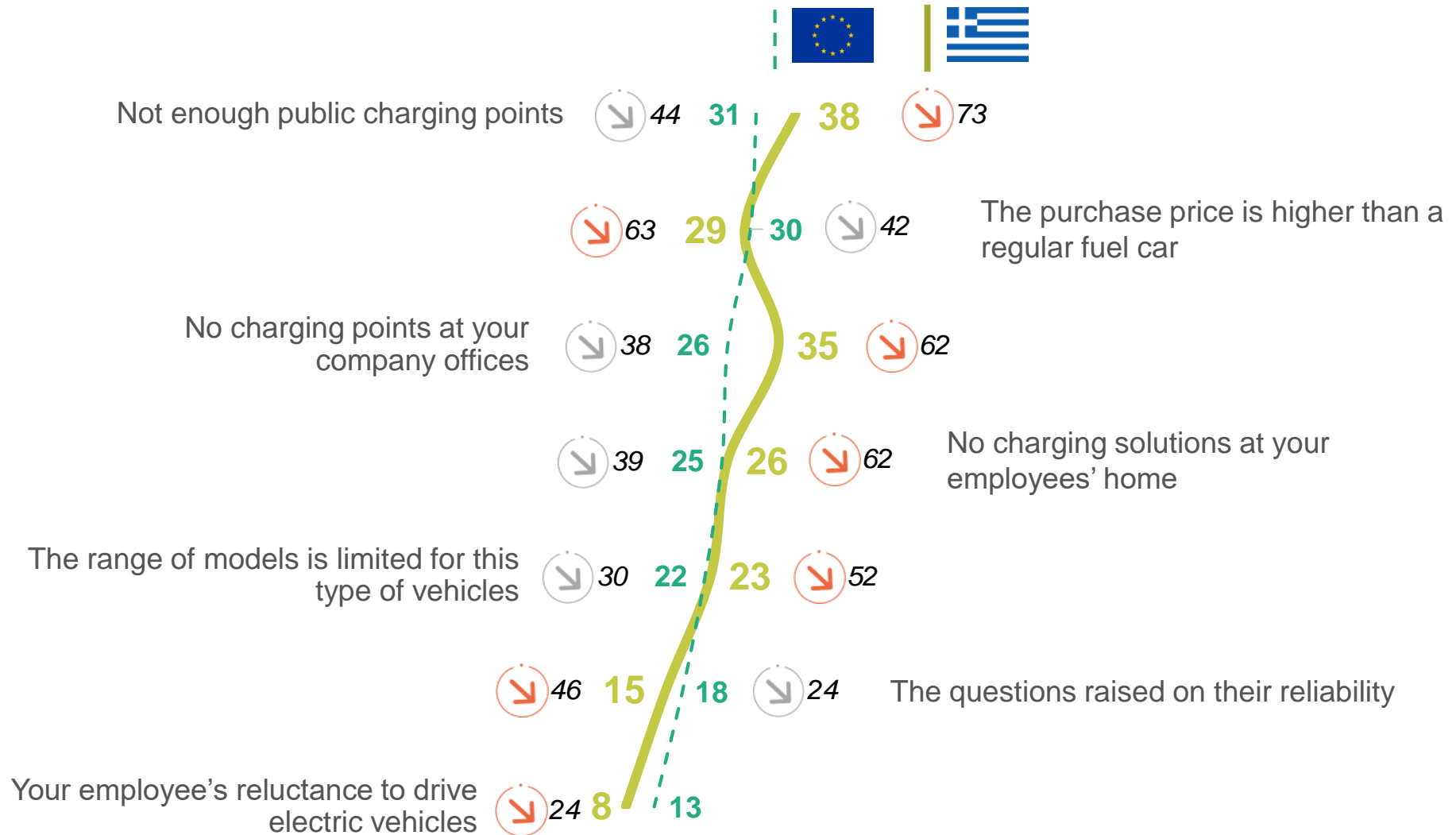


# CONSTRAINTS OF 100% BATTERY ELECTRIC VEHICLE USAGE

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

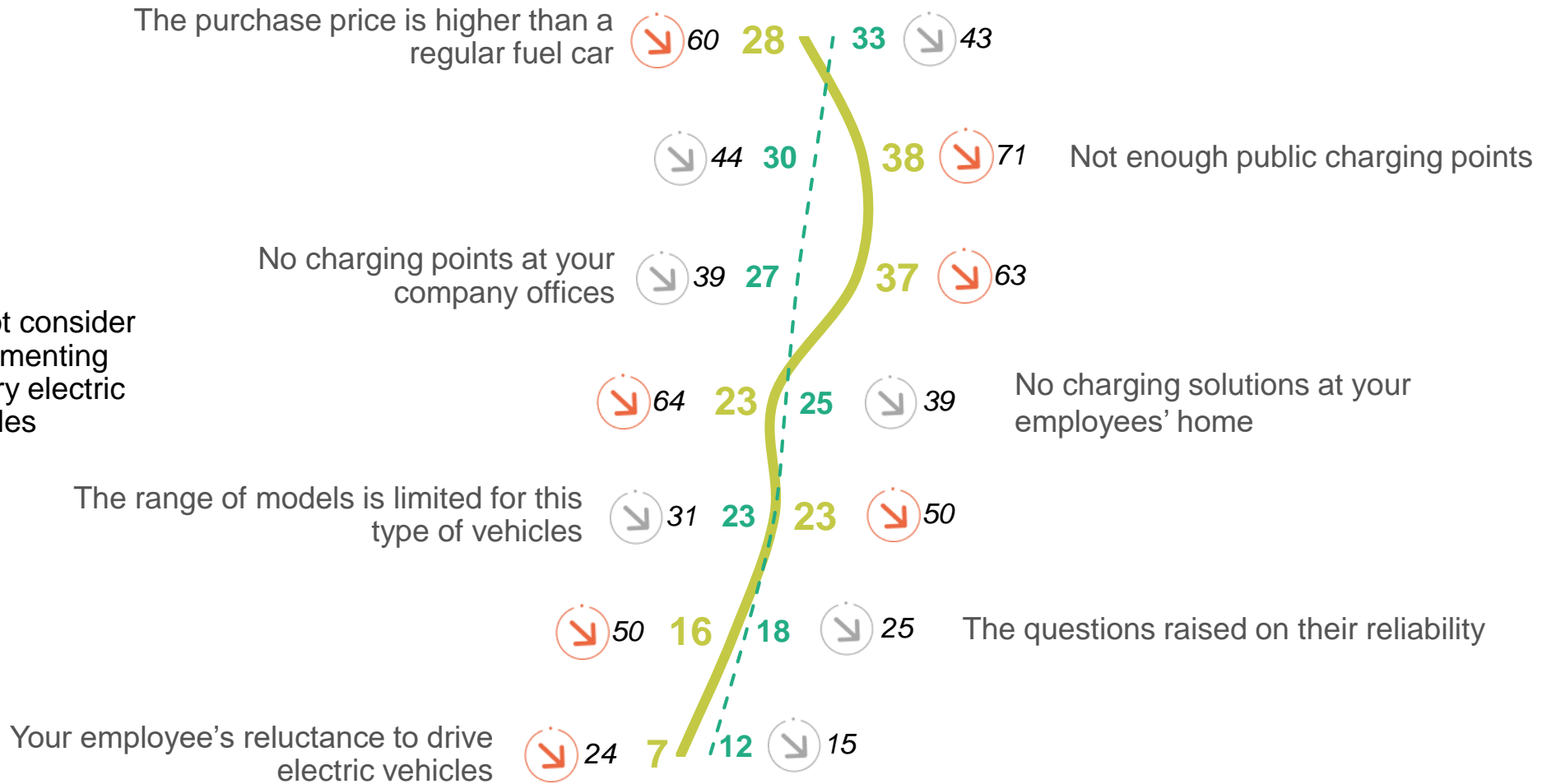
In %



Passenger cars + LCVs

do not consider implementing battery electric vehicles

59



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

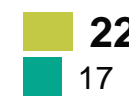
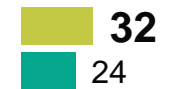
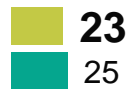
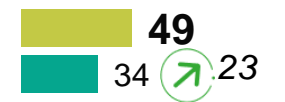
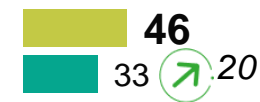
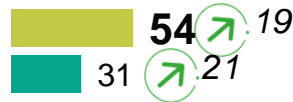
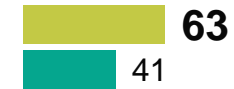
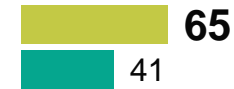
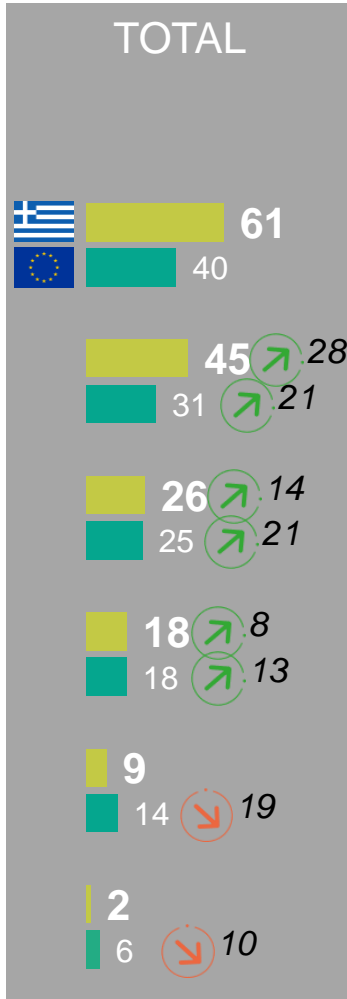
# ACCESS TO CHARGING POINTS

In %



Passenger cars + LCVs

Currently no charging points installed at the company premises



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

6

# WHAT ARE THE PERSPECTIVES IN TERMS OF MOBILITY SOLUTIONS?



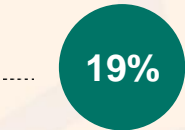
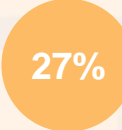
# MOBILITY SOLUTIONS



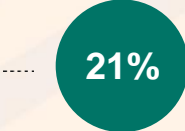
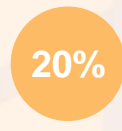
## TOP 3 USED SOLUTIONS



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



**#2** Public transport



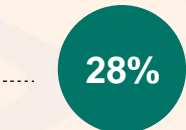
**#3** Bike (or other two wheels) sharing / bike (or other two wheels) leasing: solution provided by the company



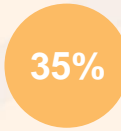
## TOP 3 POTENTIAL NEXT 3 YEARS



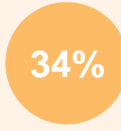
**#1** Ride sharing: where several employees travel in the same car to the same destination



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



**#3** Public transport



# MOBILITY SOLUTIONS ARE GAINING GROUND WITHIN GREEK COMPANIES

*To note : in 2023 were interrogated only respondents that are aware of mobility solutions, which means almost 85% of overall population (no impact on the representativity of the results). 30% 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

- Regarding mobility solutions implementation, **Greek companies are catching up with the European average** : 7 out of 10 companies have already implemented at least one mobility solution.

2

- **Ride sharing, the most implemented solution, is more widespread than in other European countries.**

As for other mobility solutions, **implementation is contrasted according to company size** : small Greek companies are more voluntarist on “innovative” solutions such as corporate sharing, mobility budget and mobility app, even more than in other European countries.

# MOBILITY SOLUTION DECISION MAKERS

## RESPONDENTS INVOLVEMENT IN MOBILITY SOLUTION DECISIONS

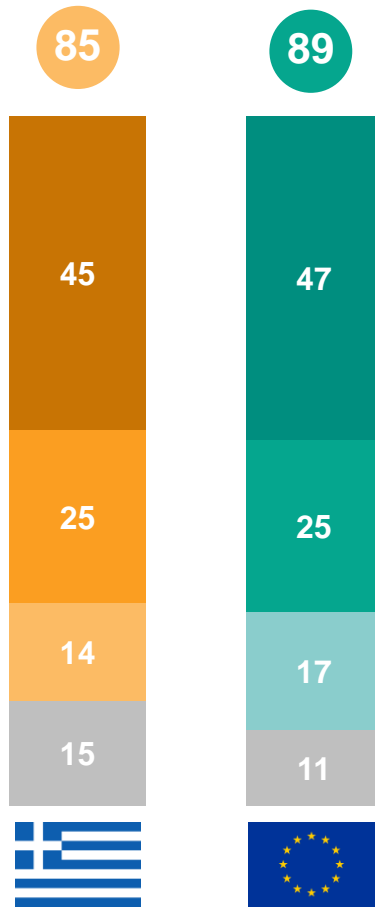
### NET ARE AWARE OF MOBILITY SOLUTIONS

(Decision maker, influencer or informed)

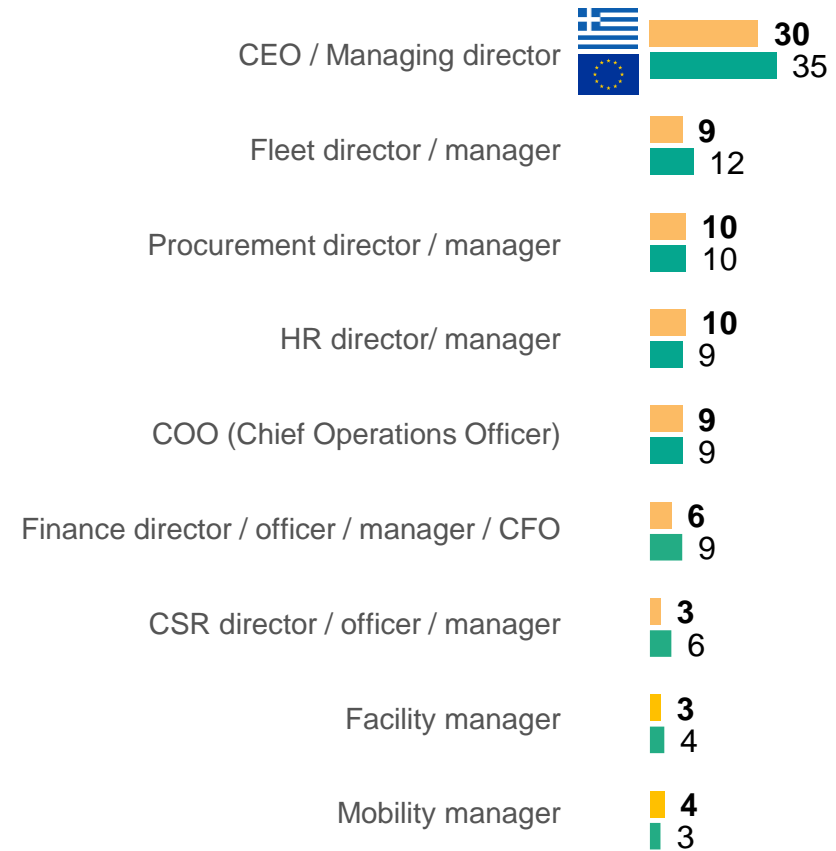


- I am a decision maker or a co-decision maker
- I have some influence on the decisions but do not decide
- I am not involved in the decision-making process, but I am informed about mobility solutions

I am not aware of mobility solutions in the company

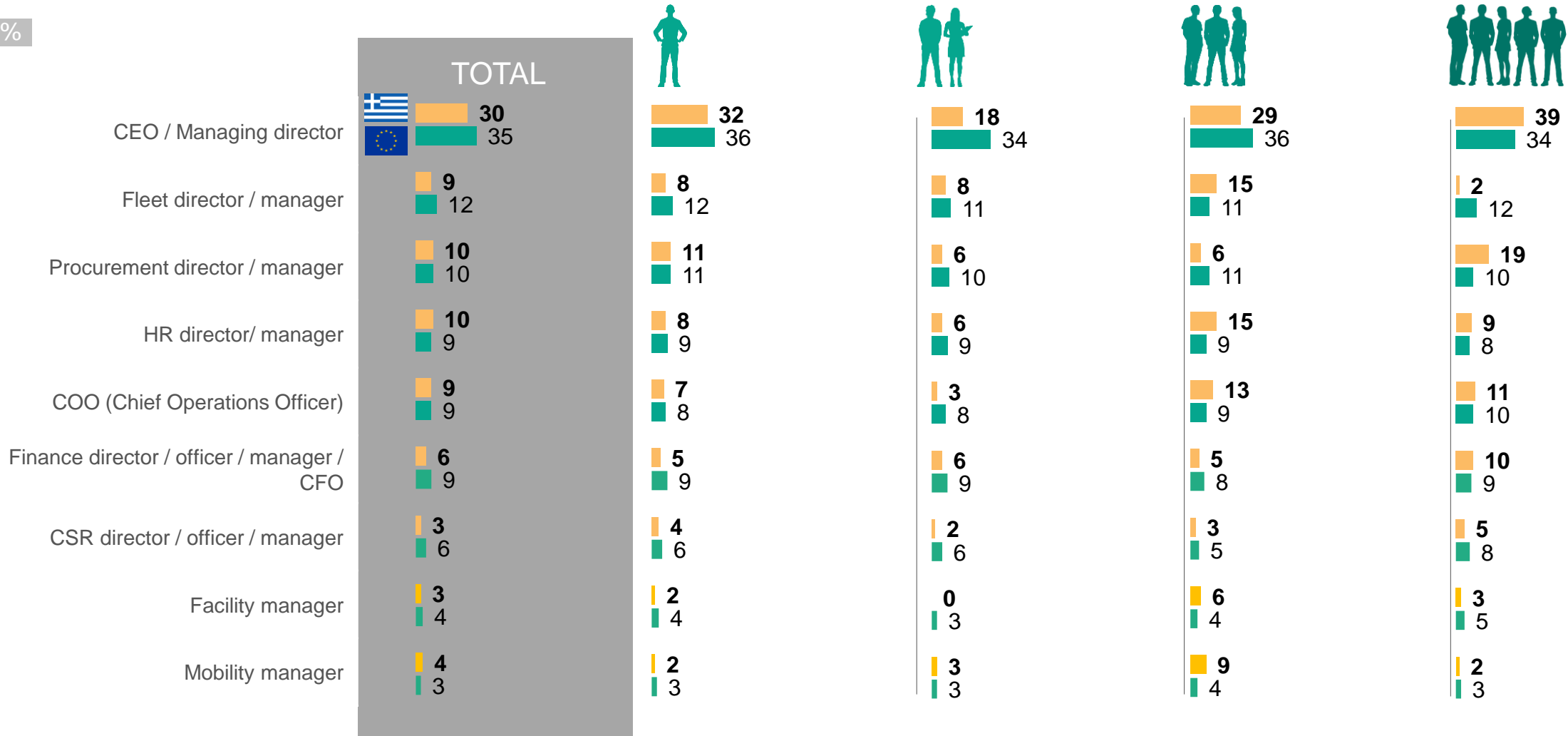


## POSITION OF THE PERSON WHO DECIDES ON MOBILITY SOLUTIONS



# POSITION OF THE PERSON WHO DECIDES ON MOBILITY SOLUTIONS

In %





# MOBILITY SOLUTIONS LIST AND DEFINITIONS



## **CORPORATE CAR SHARING:**

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



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



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



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



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



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



**PUBLIC TRANSPORT**



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



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

# MOBILITY SOLUTIONS IMPLEMENTATION

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

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

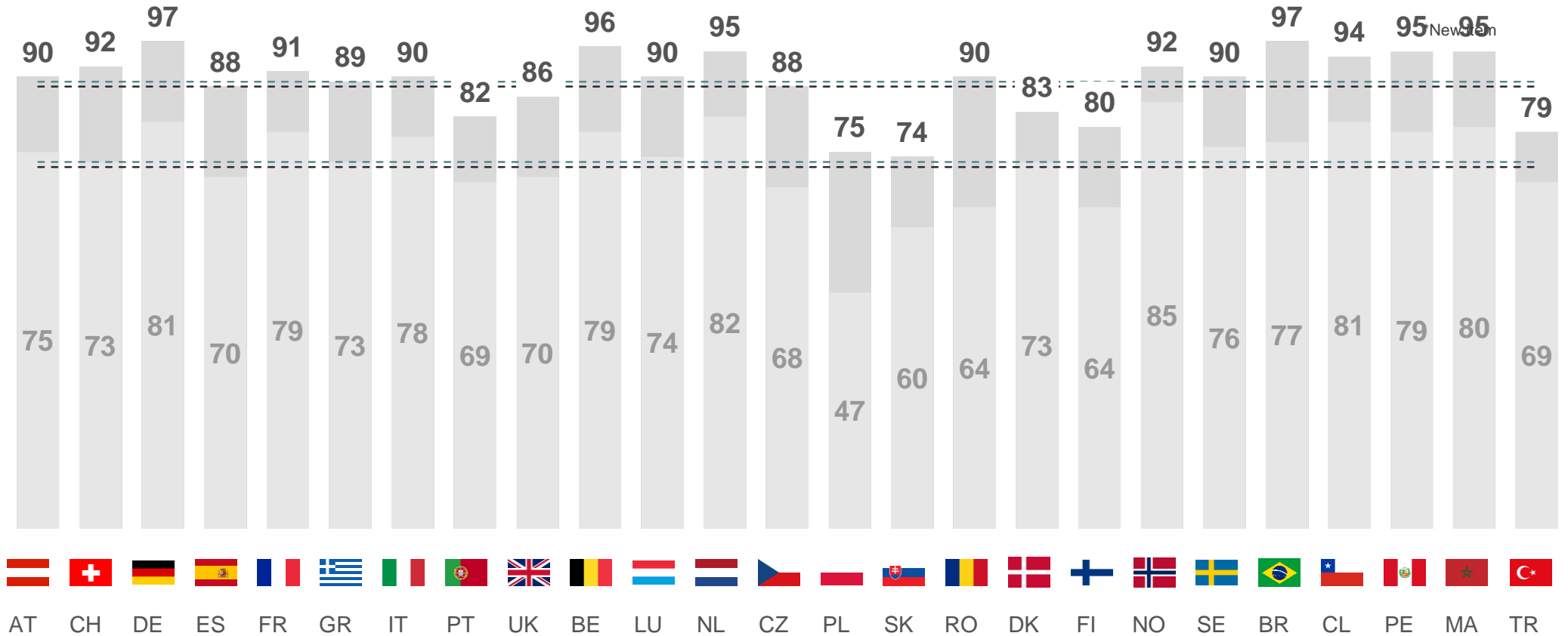
In %



ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS



ALREADY USING



89  
88  
73  
72

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)

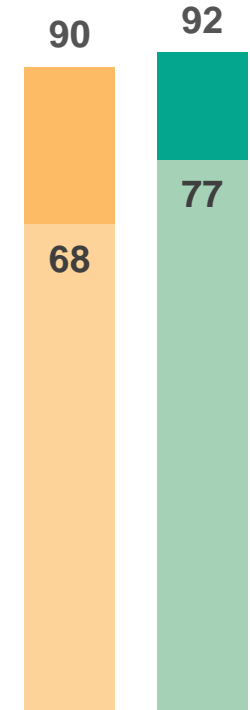
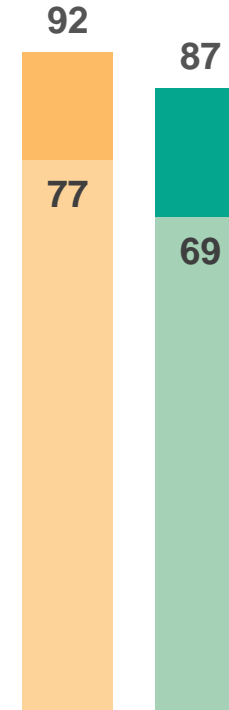
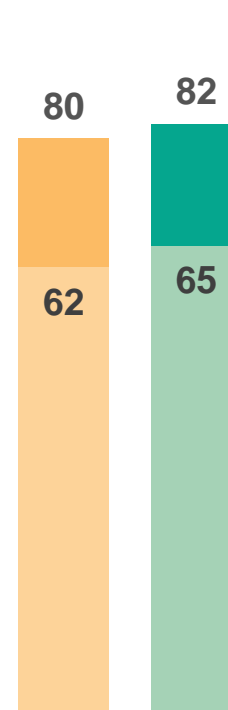
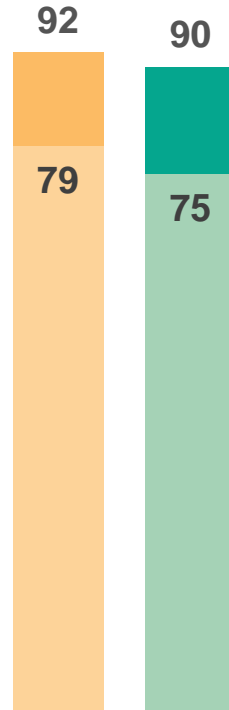
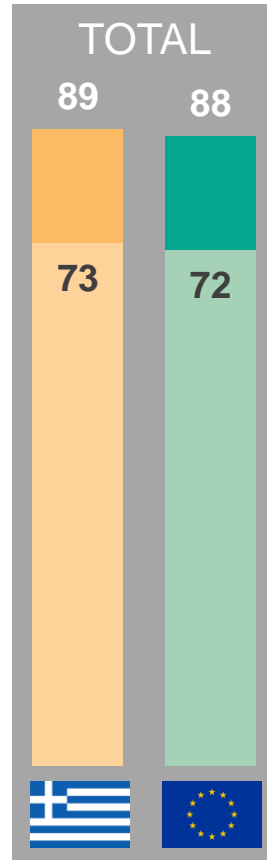
In %



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 %

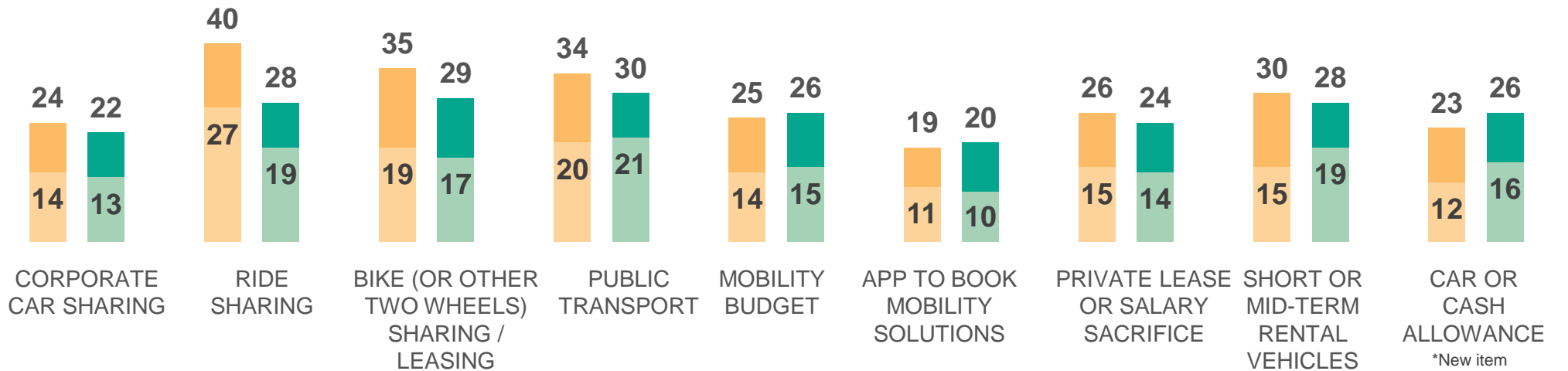
**73%** Of companies have already implemented at least one of these solutions



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

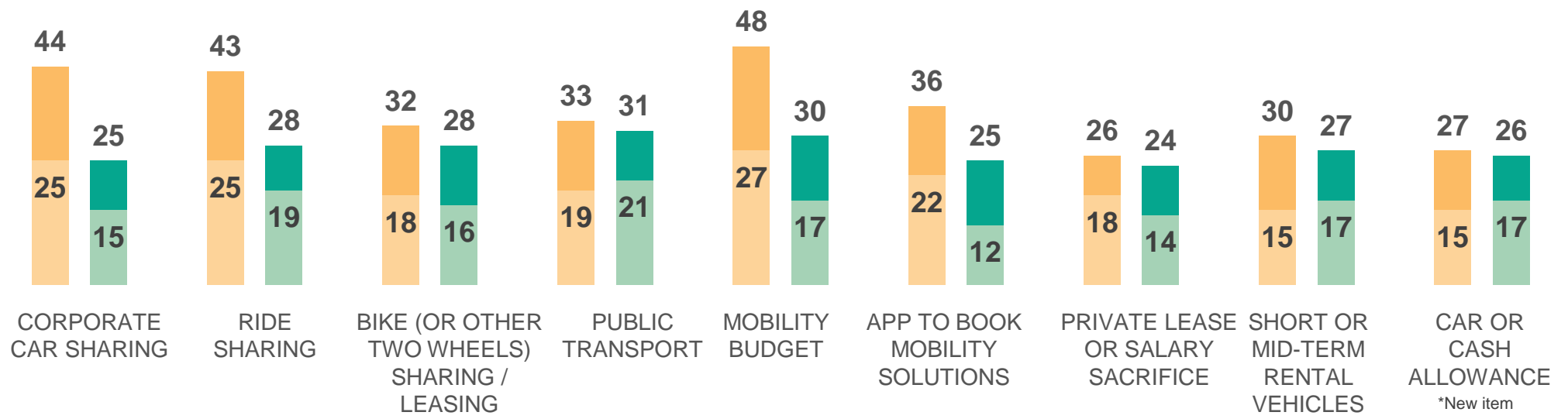
73%

Of companies have already implemented at least one of these solutions



ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS

ALREADY USING



\*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

# OVERVIEW OF MOBILITY SOLUTIONS IMPLEMENTATION

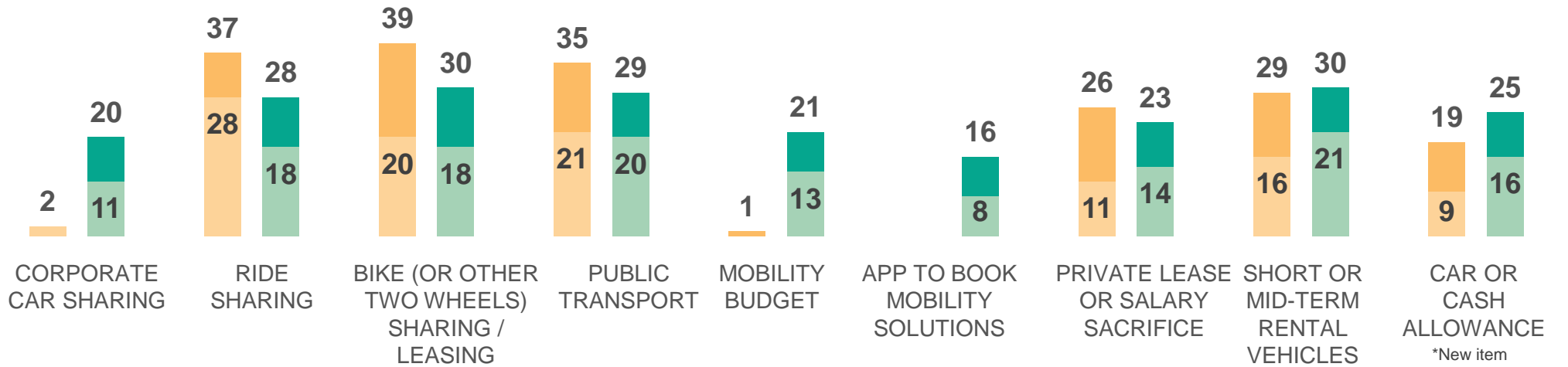
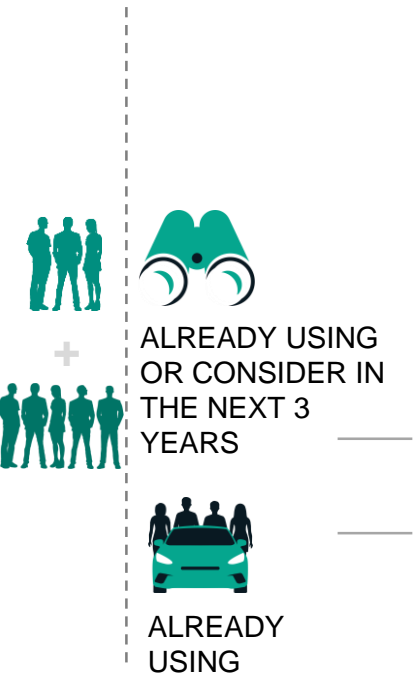
Focus on 100 and more

**73%**

Of companies have already implemented at least one of these solutions



In %



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

Question asked to respondents that are aware of mobility solutions

# CORPORATE CAR SHARING IMPLEMENTATION

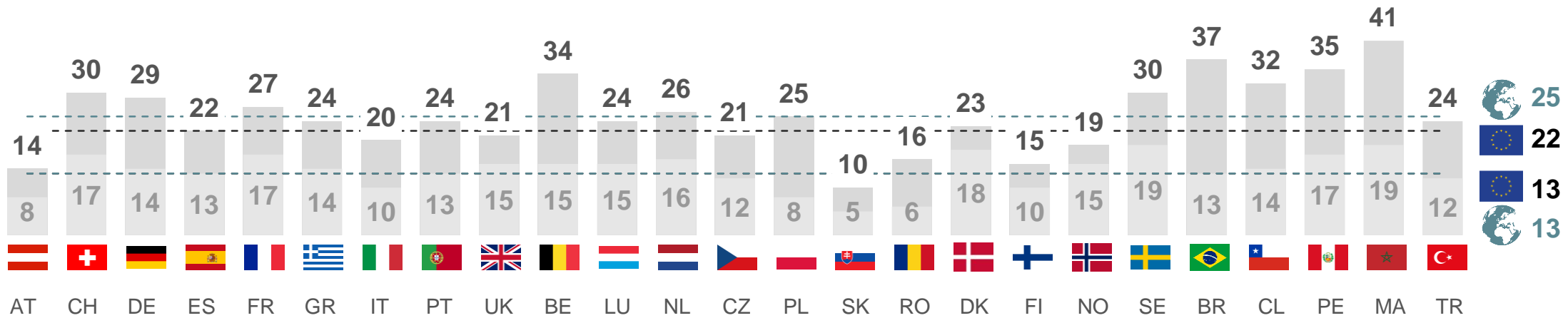
In %



ALREADY IMPLEMENTED OR CONSIDER 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

# CORPORATE CAR SHARING IMPLEMENTATION

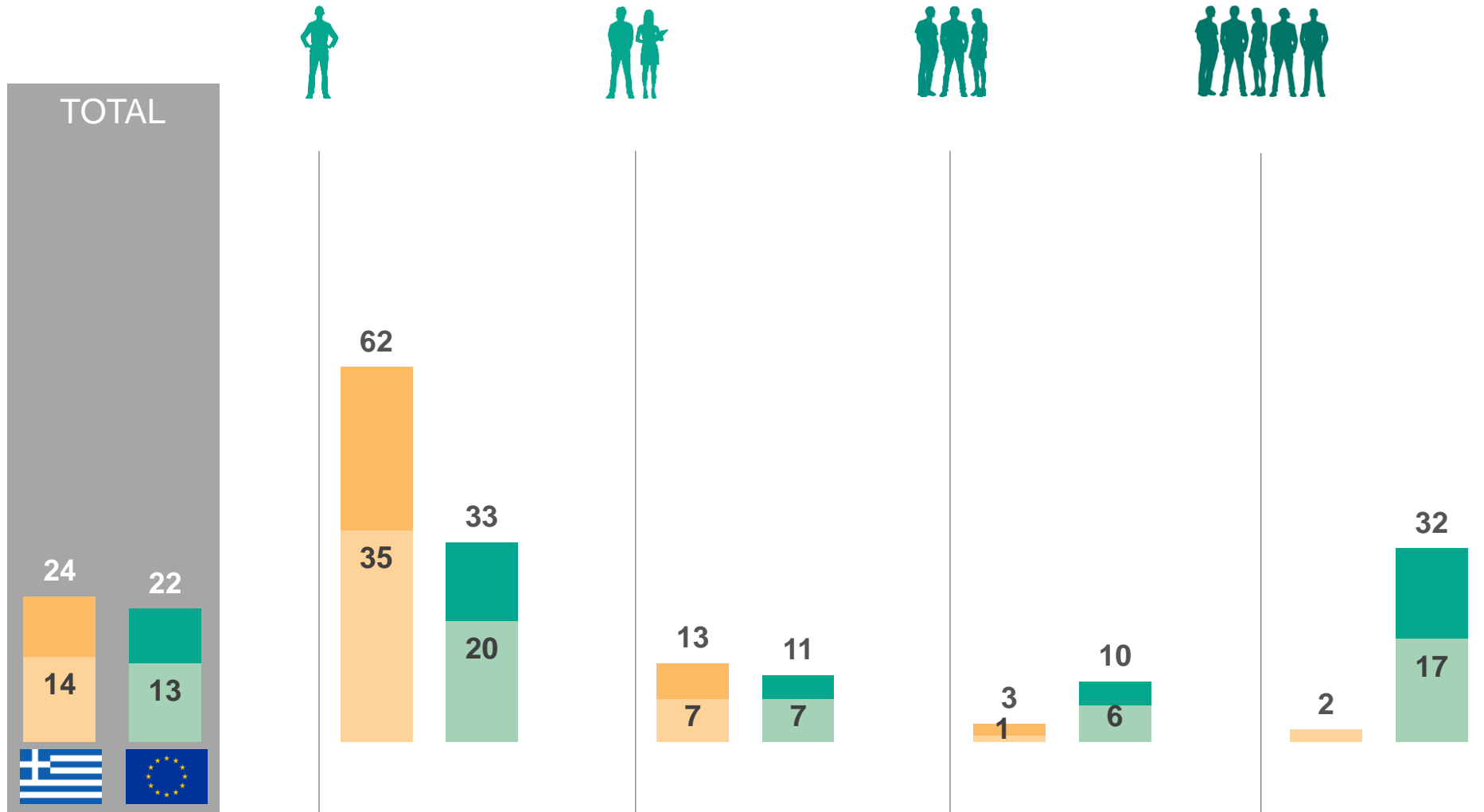
In %



ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS



ALREADY USING



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



# RIDE SHARING IMPLEMENTATION

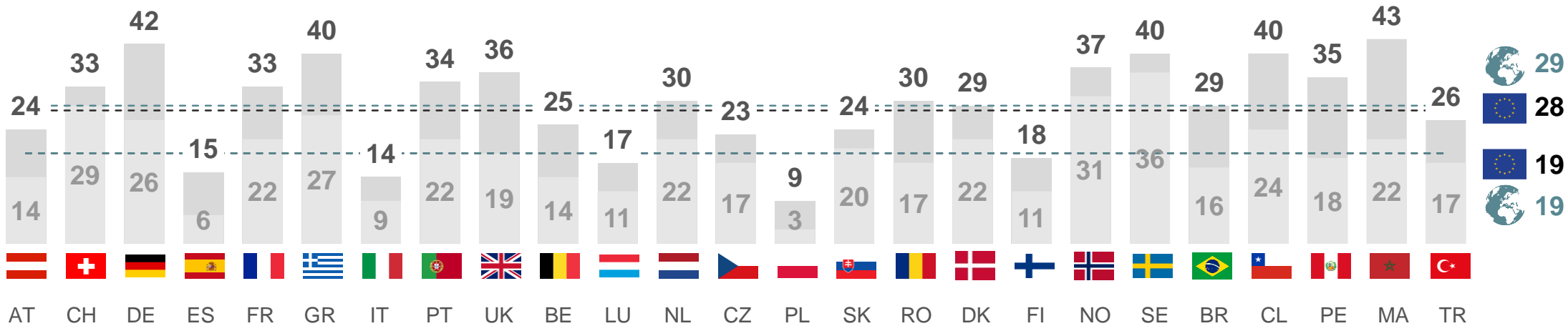
In %



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



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

# RIDE SHARING IMPLEMENTATION

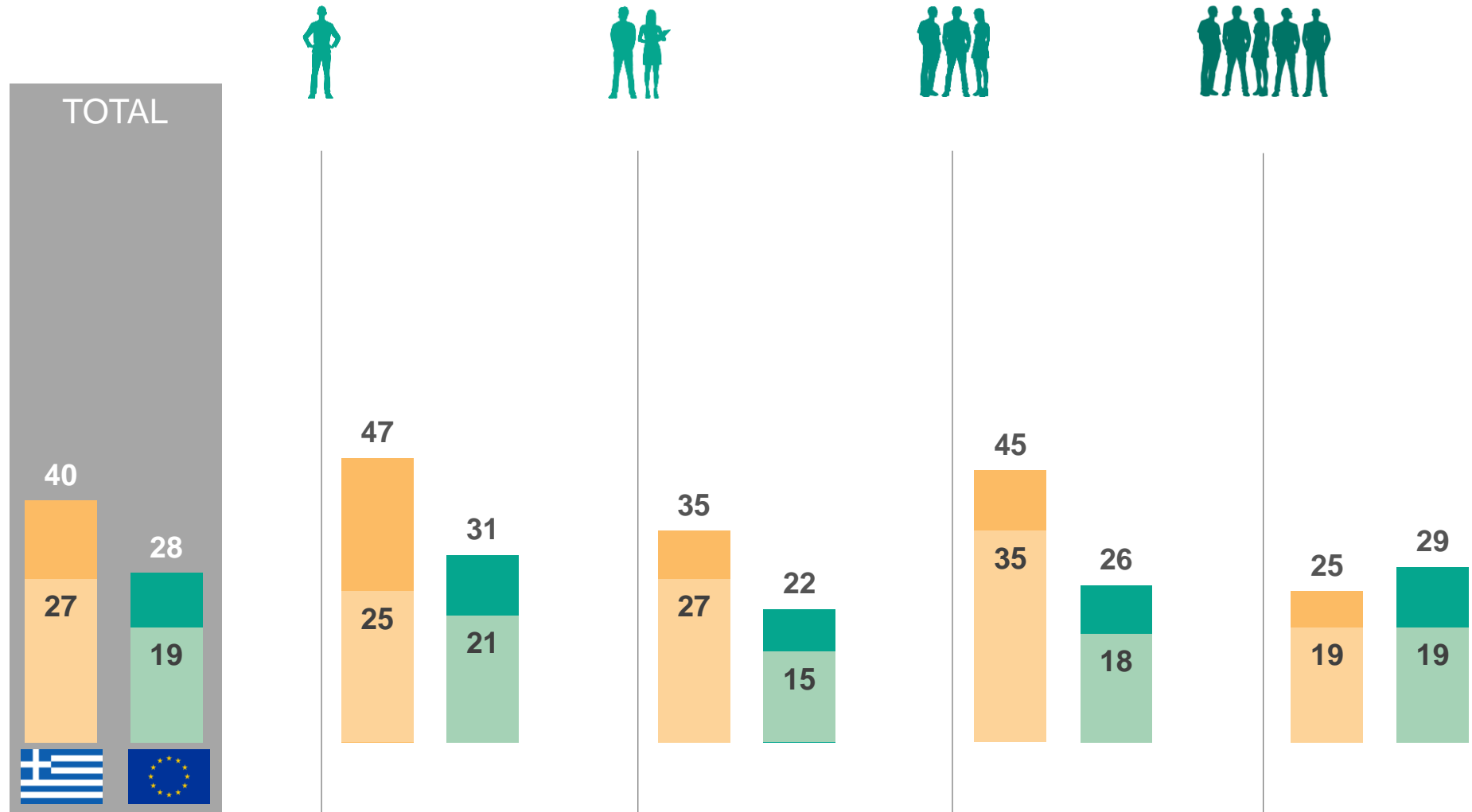
In %



ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS



ALREADY USING



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

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

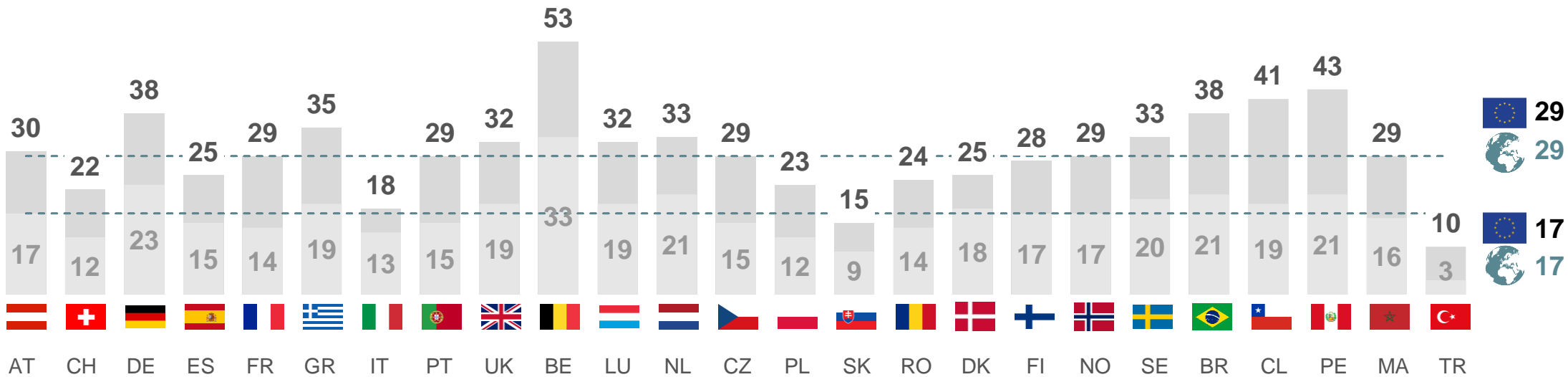
In %



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



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

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

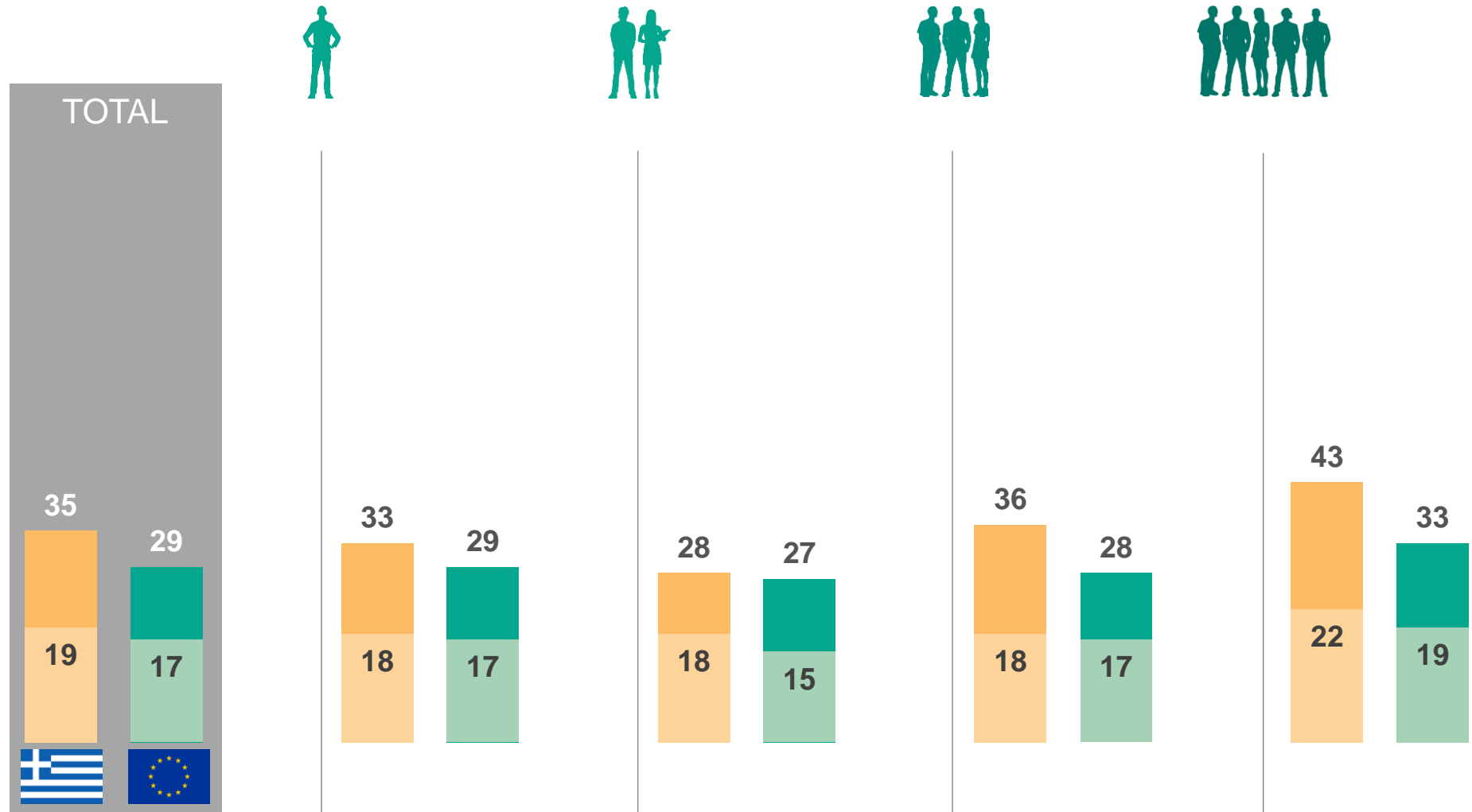
In %



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



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

# PUBLIC TRANSPORT IMPLEMENTATION

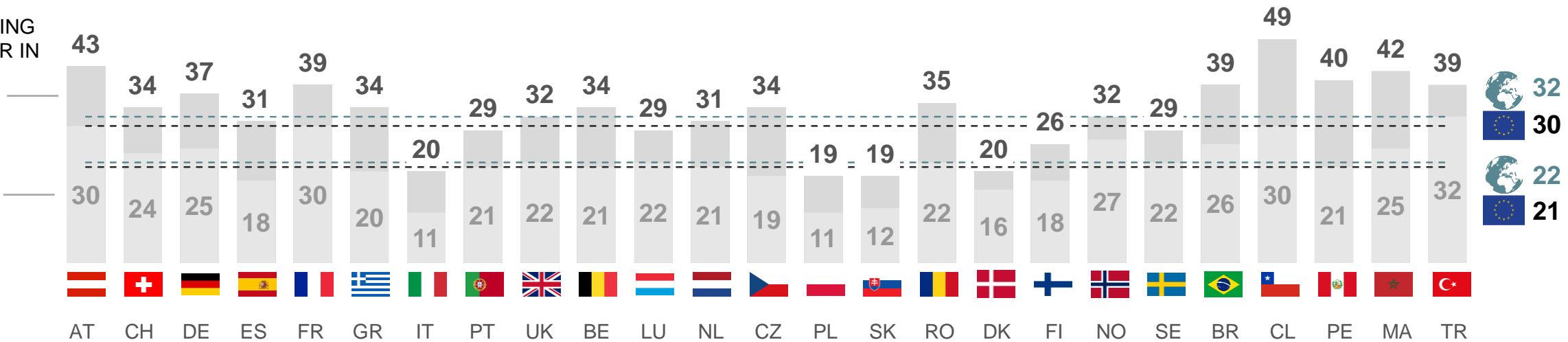
In %



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

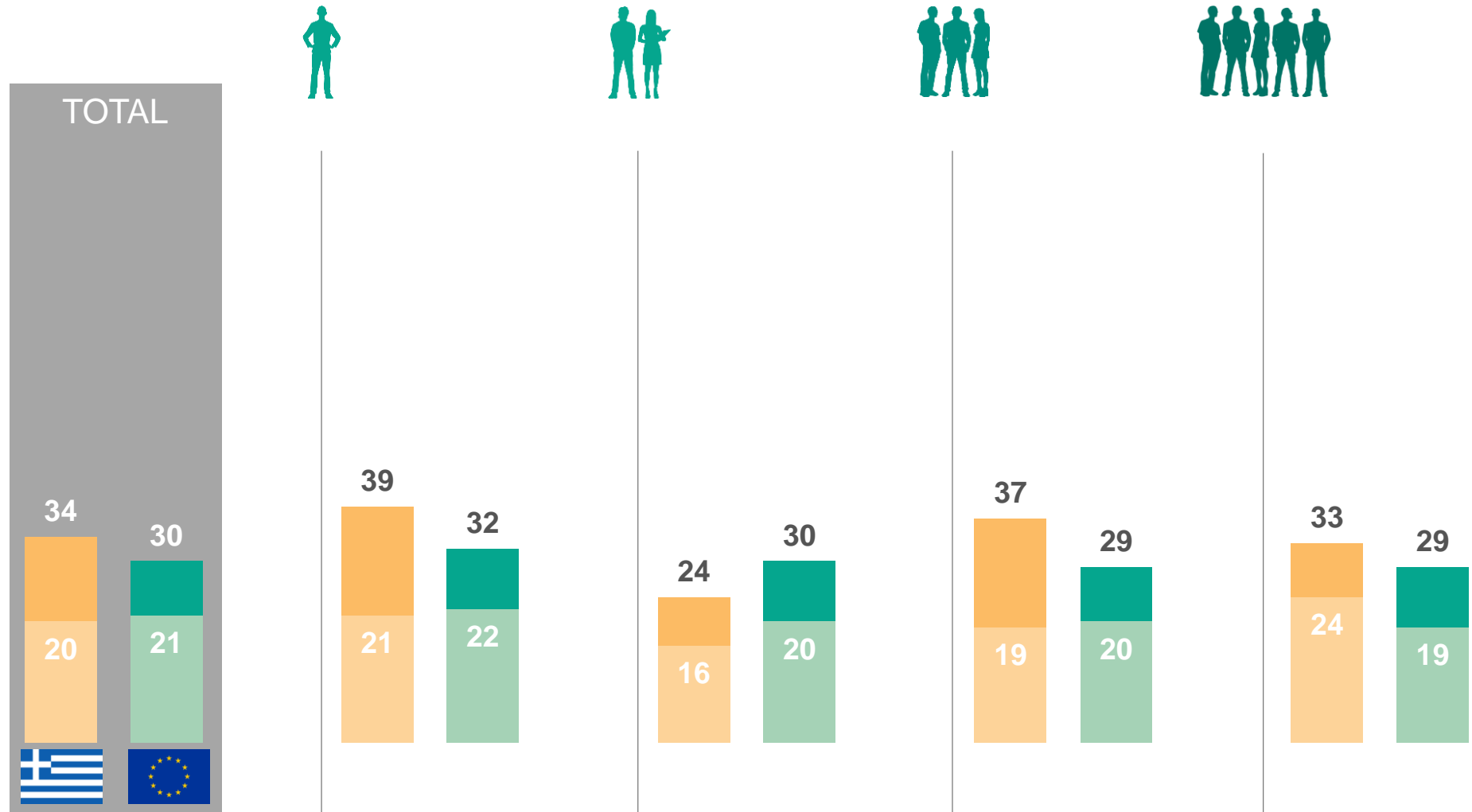
In %



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



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

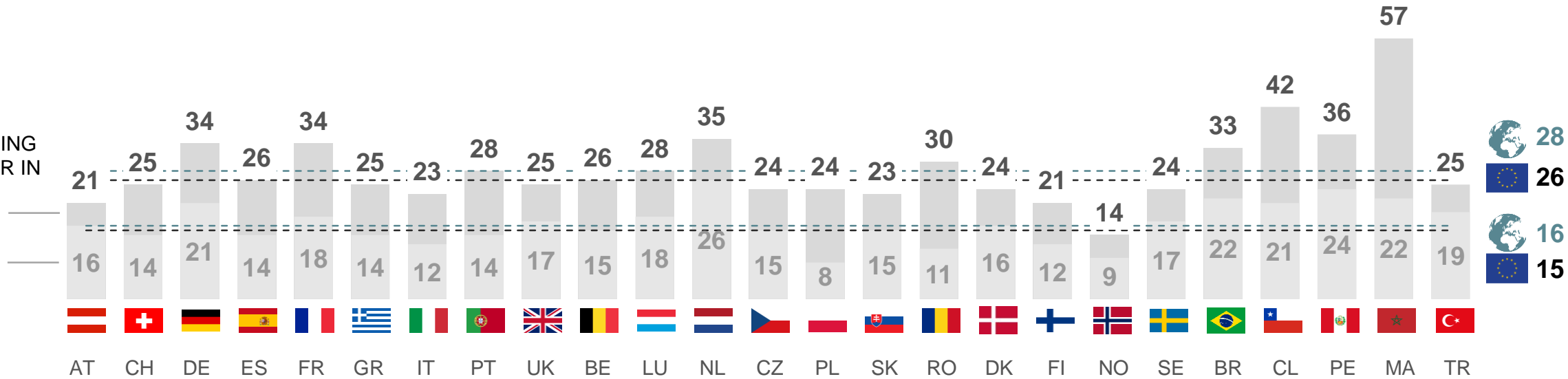
In %



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



28  
26  
16  
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

# MOBILITY BUDGET IMPLEMENTATION

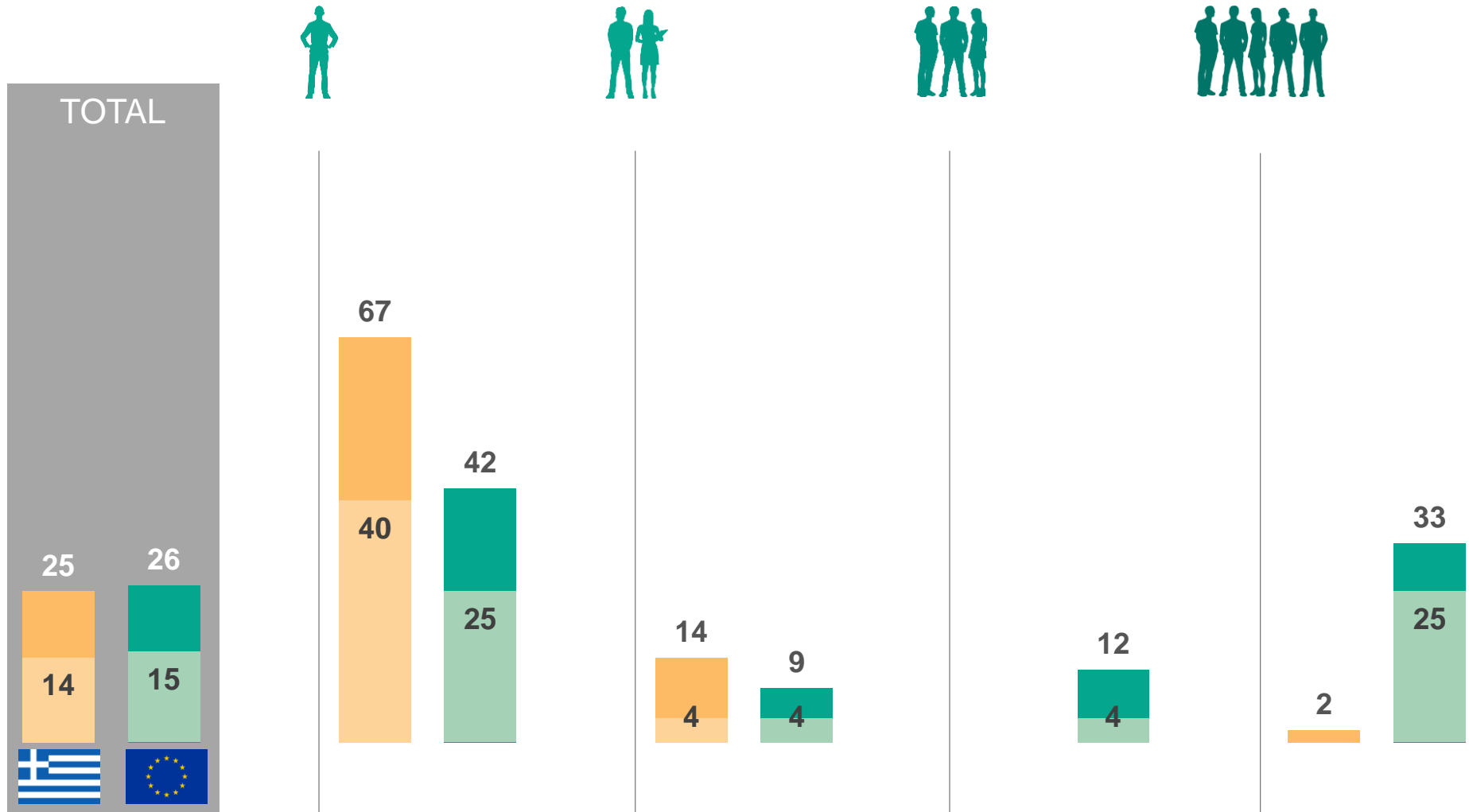
In %



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

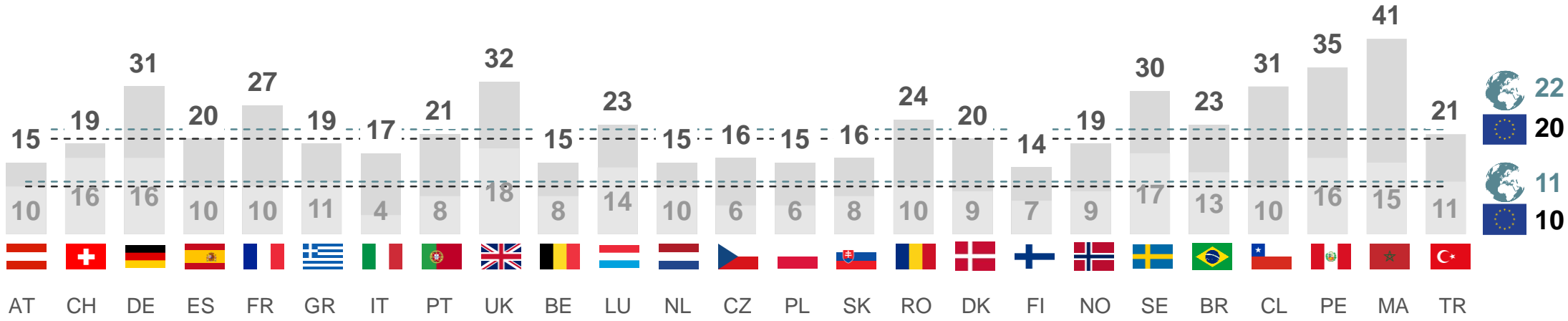
In %



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



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

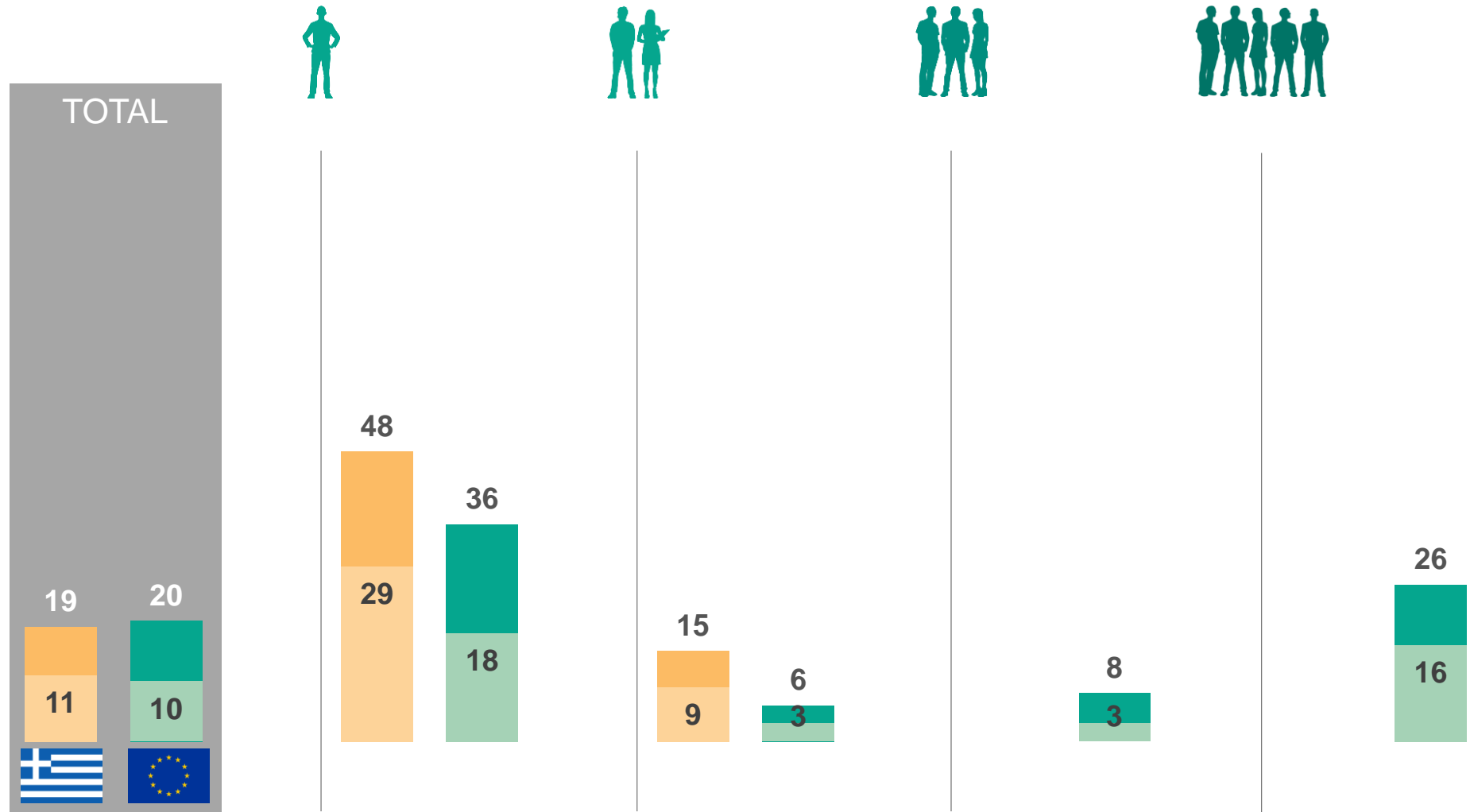
In %



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



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

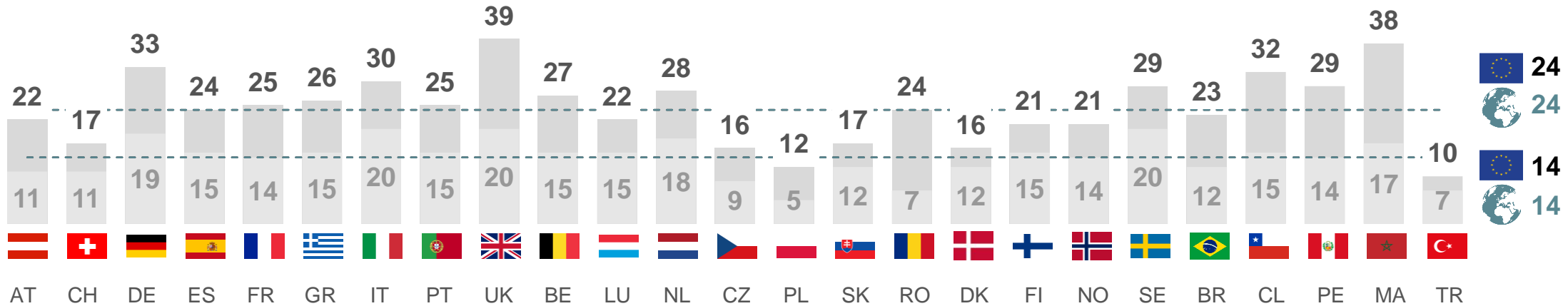
In %



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

# PRIVATE LEASE OR SALARY SACRIFICE IMPLEMENTATION

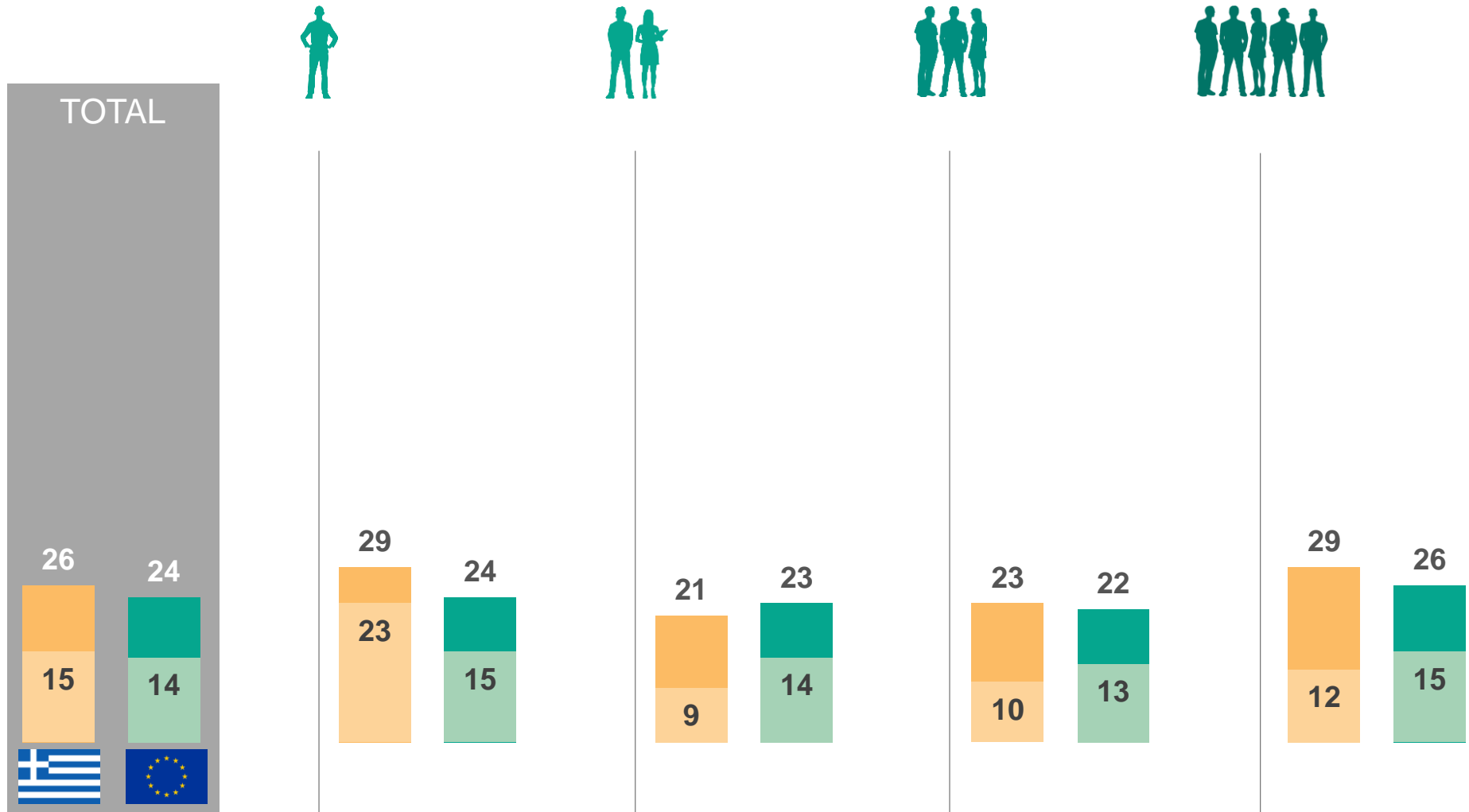
In %



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

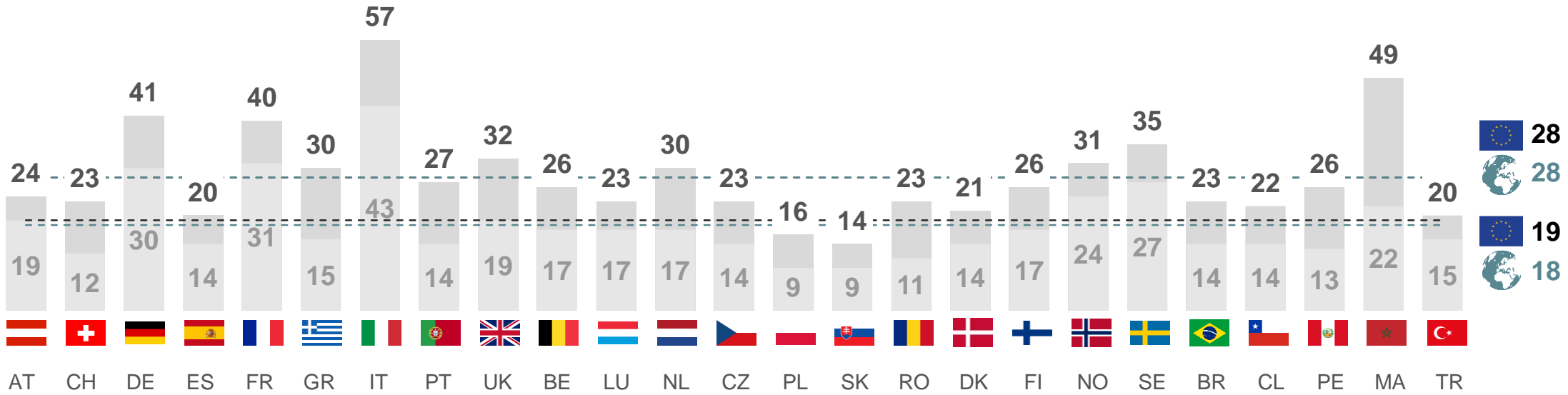
In %



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

# SHORT OR MID-TERM RENTAL VEHICLES IMPLEMENTATION

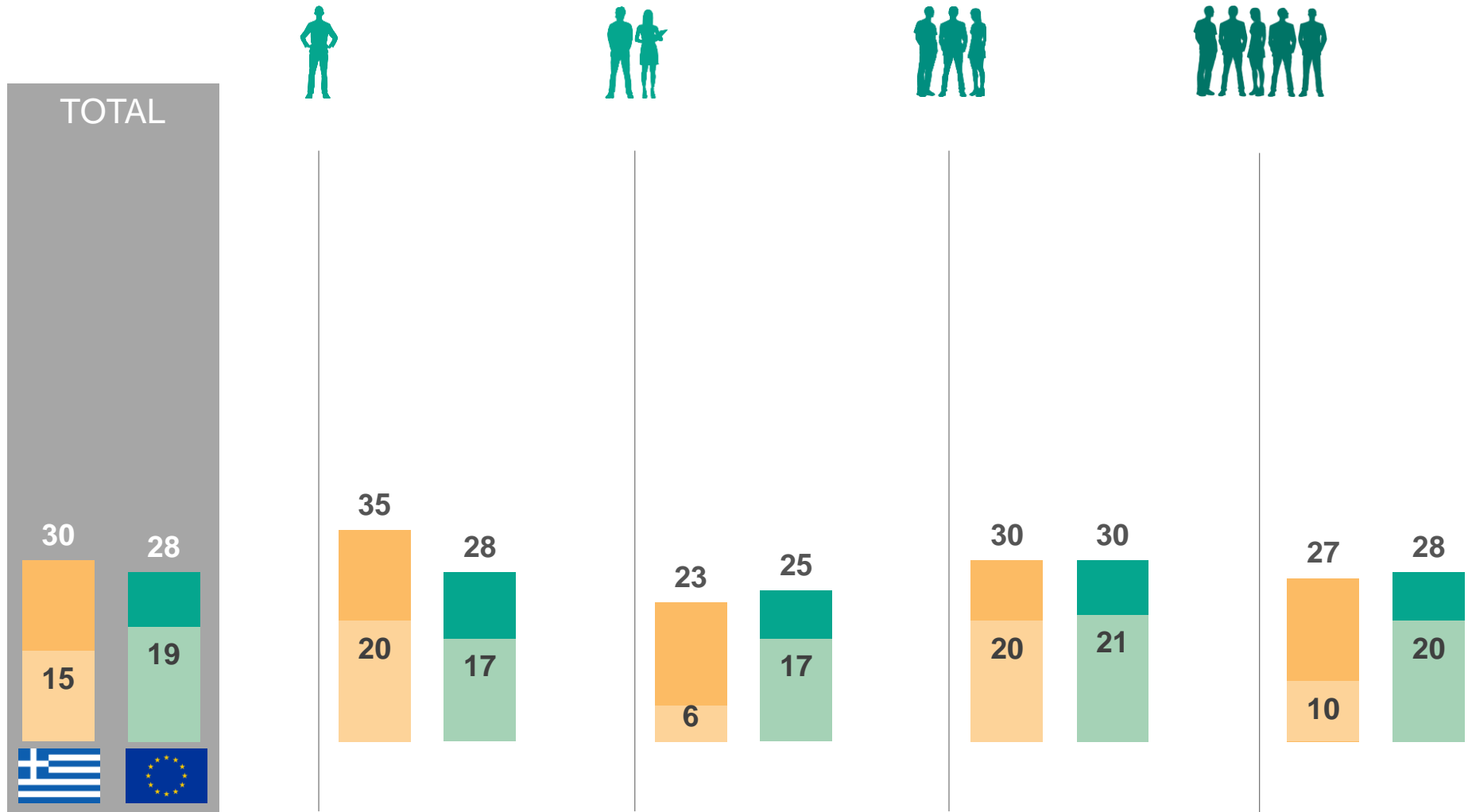
In %



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

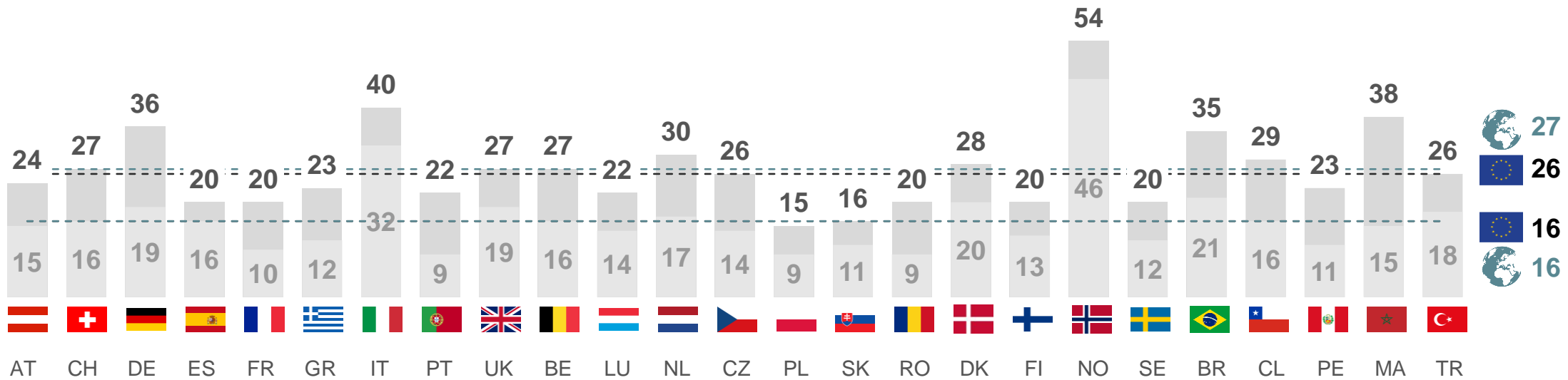
In %



ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS



ALREADY USING



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

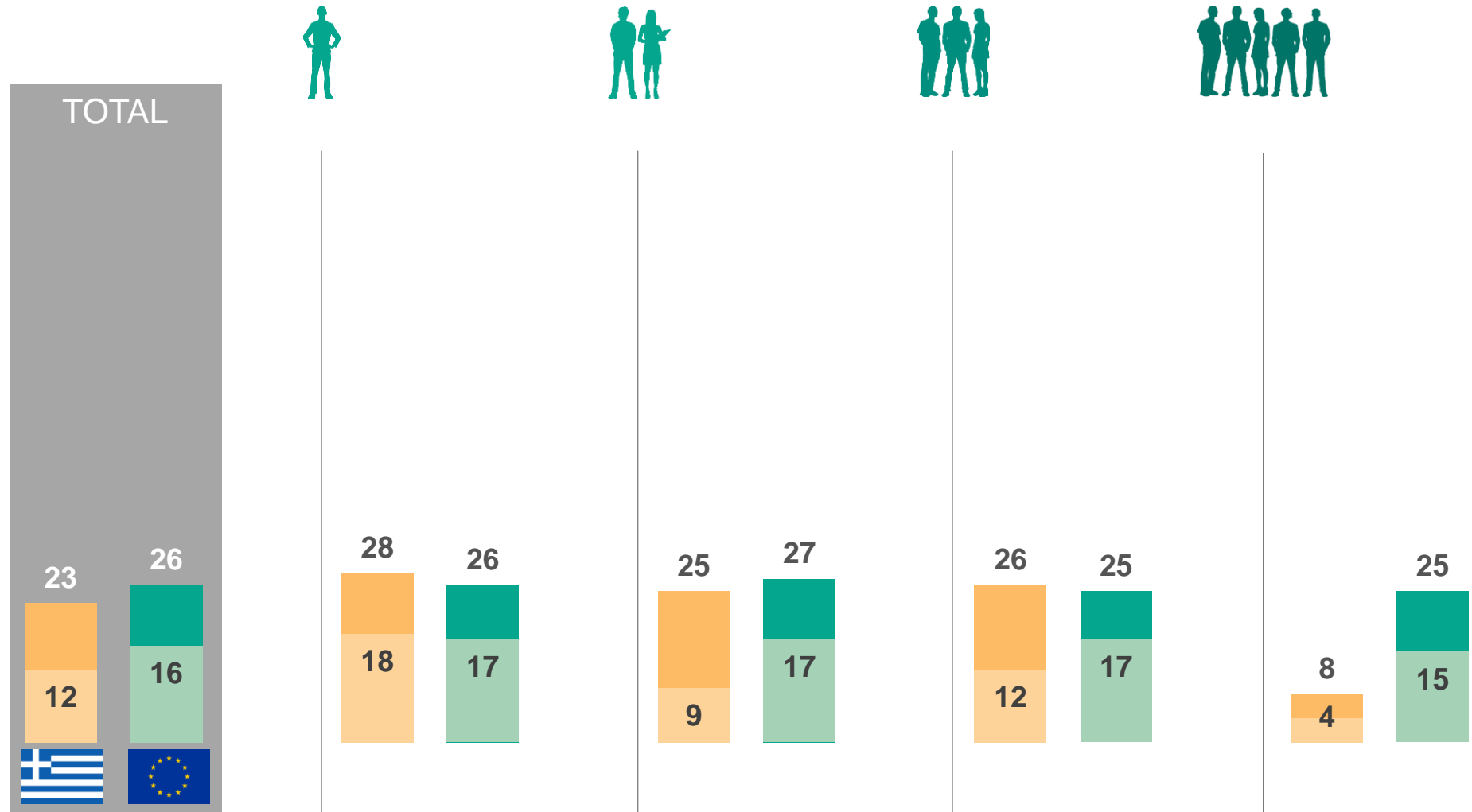
In %



ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS



ALREADY USING

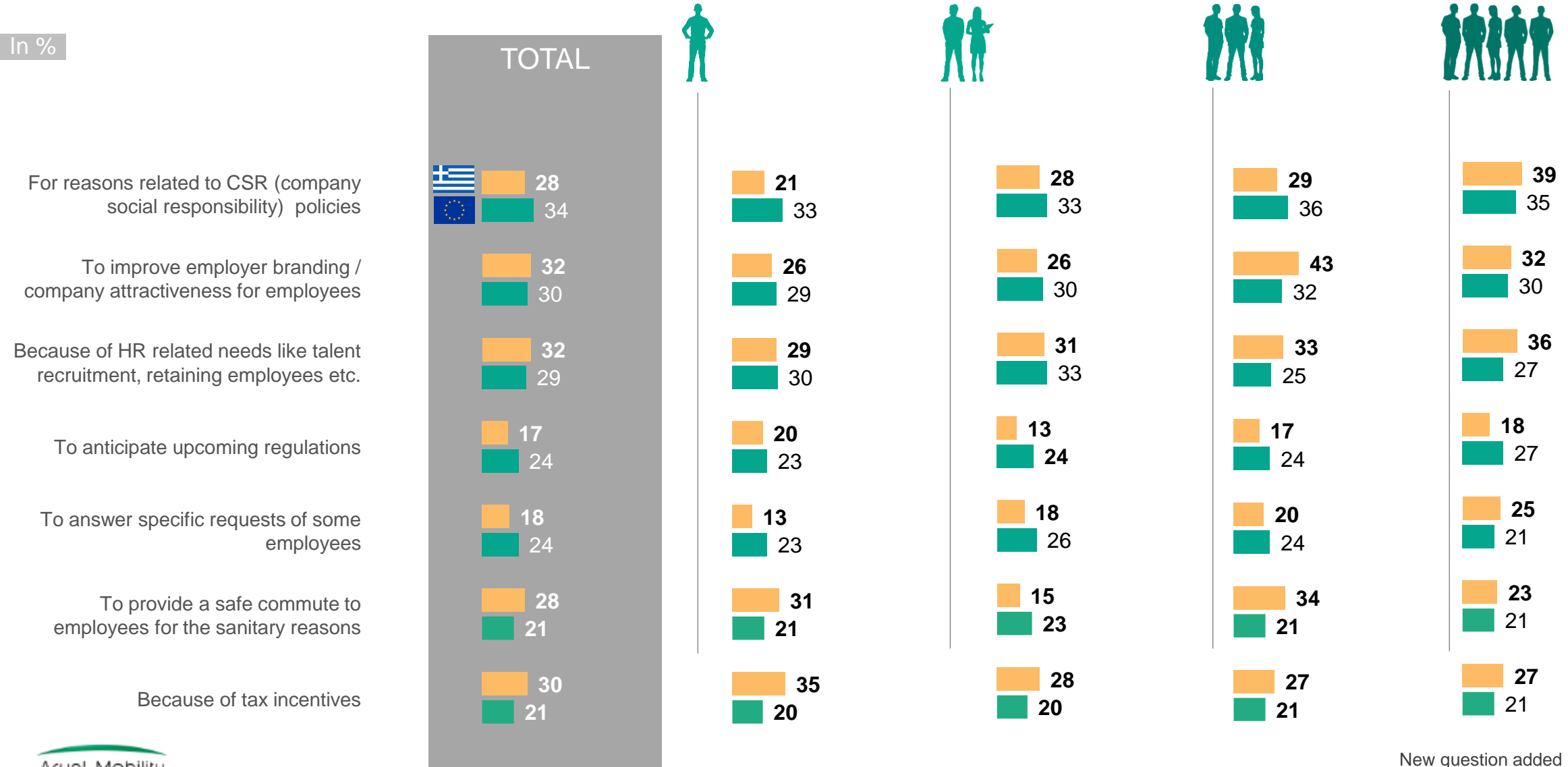


Which of the following have you implemented or will you implement in the next 3 years?  
 Response scale: Already using, considered in the next 3 years, not interested  
 Basis: companies with corporate vehicles = 100%  
 Question asked to respondents that are aware of mobility solutions



# REASONS FOR IMPLEMENTING OR CONSIDERING MOBILITY SOLUTIONS

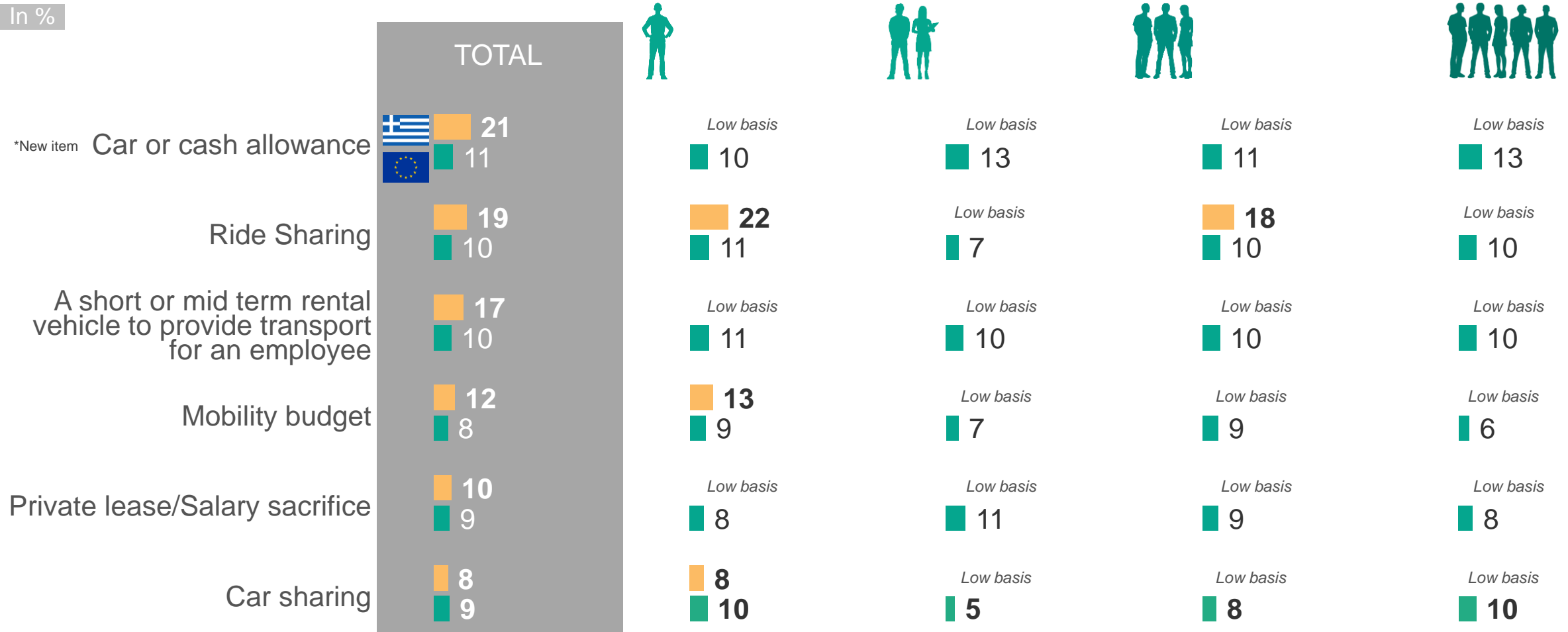
In %



# 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?

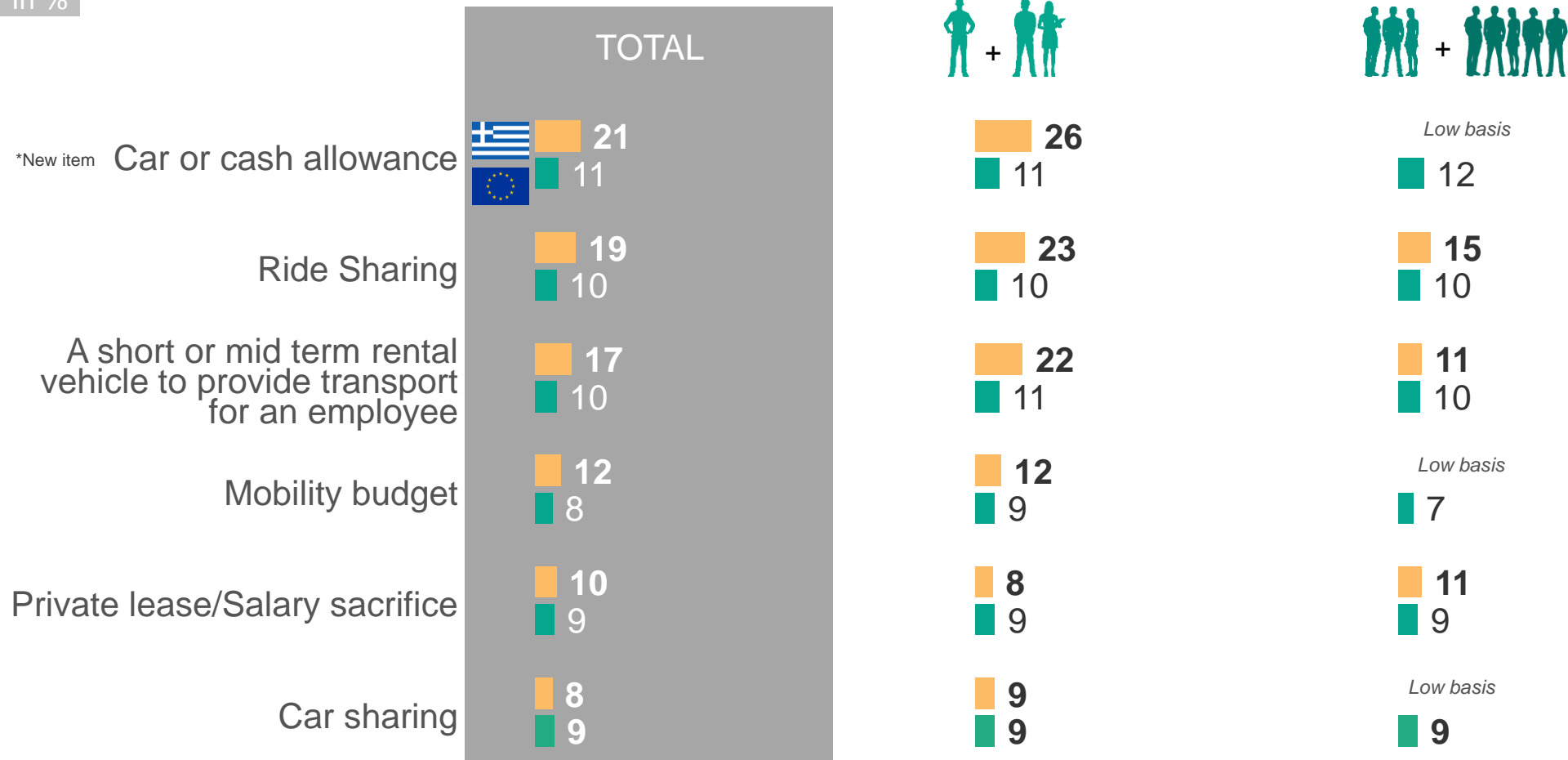
**Basis: companies using or considering at least one mobility solution**

Question asked to respondents that are aware of mobility solutions

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

Certainly

In %



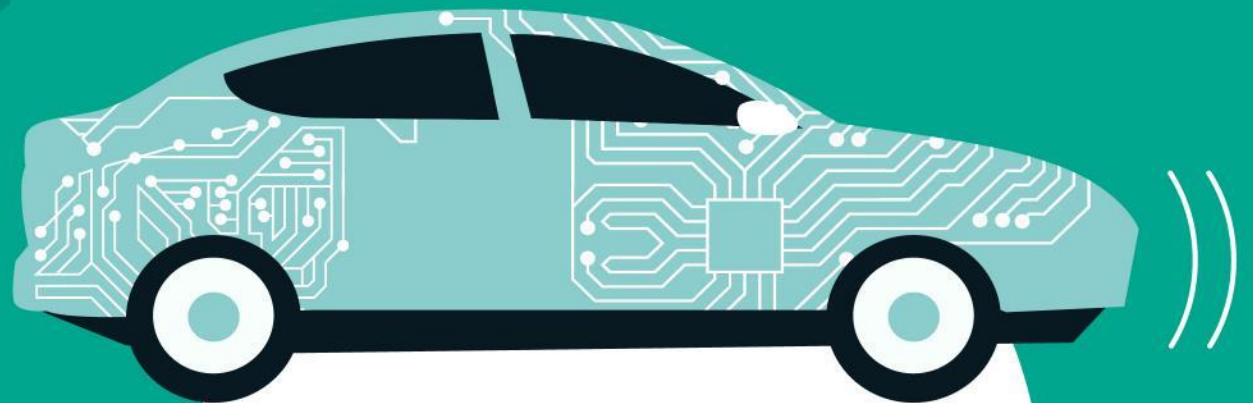
Would you anticipate that your company would give up all or part of the company car fleet for such alternatives?

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

Question asked to respondents that are aware of mobility solutions

7

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



# AN INTEREST FOR CONNECTED VEHICLES STILL DRIVEN BY SAFETY REASONS

1

- **The use of Telematics within Greek companies is stable this year, and slightly below the European average (38% vs 44%).**

2

**LCVs fleets are more equipped** than passenger cars fleets, and the use of this kind of vehicles is **more widespread in the largest companies.**

The main motivations to use these connected vehicles still mainly rely on **vehicle's location and security.**

# CONNECTED VEHICLES



## USE OF TELEMATICS



38%



44%



## TOP 3 REASONS



47%



37%

- #1 To locate vehicles or improve vehicle security
- #2 To improve drivers safety / behaviours
- #3 To avoid not allowed usage (e.g. for tax reasons)

38%

30%

29%

24%

# PROPORTION OF COMPANIES USING CONNECTED VEHICLES

All vehicles

In %



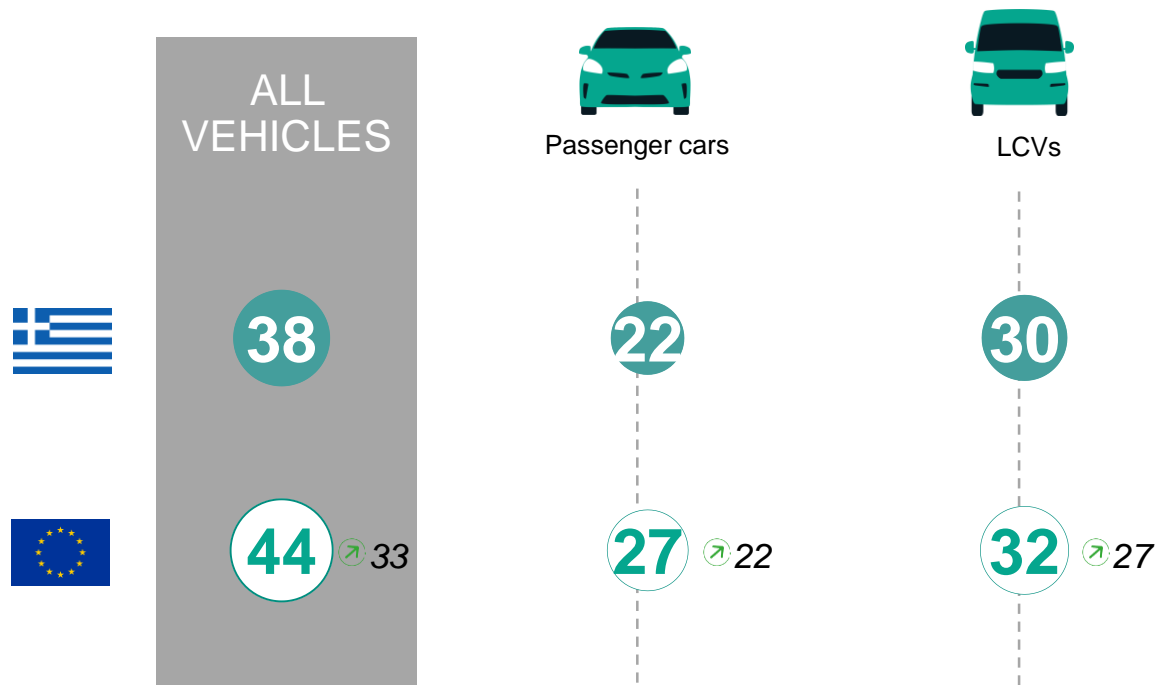
Passenger cars + LCVs

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

## HOW TO READ THE RESULTS ?

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

22% use connected vehicles for passenger cars, while 30% 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

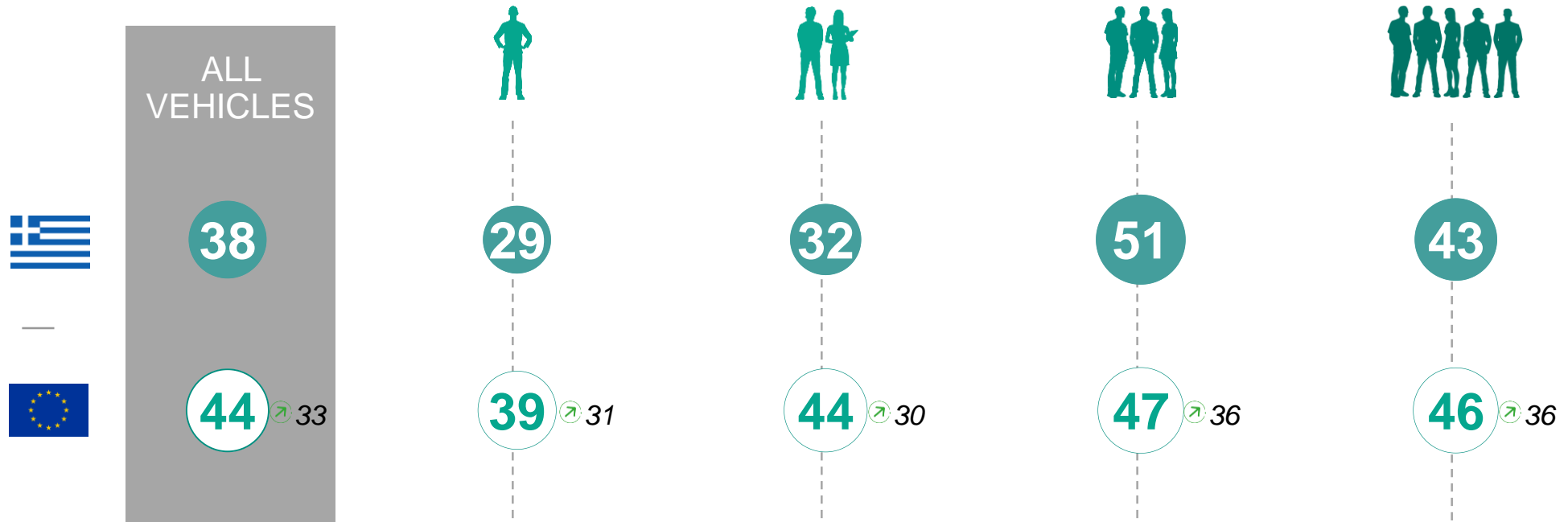
All vehicles

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



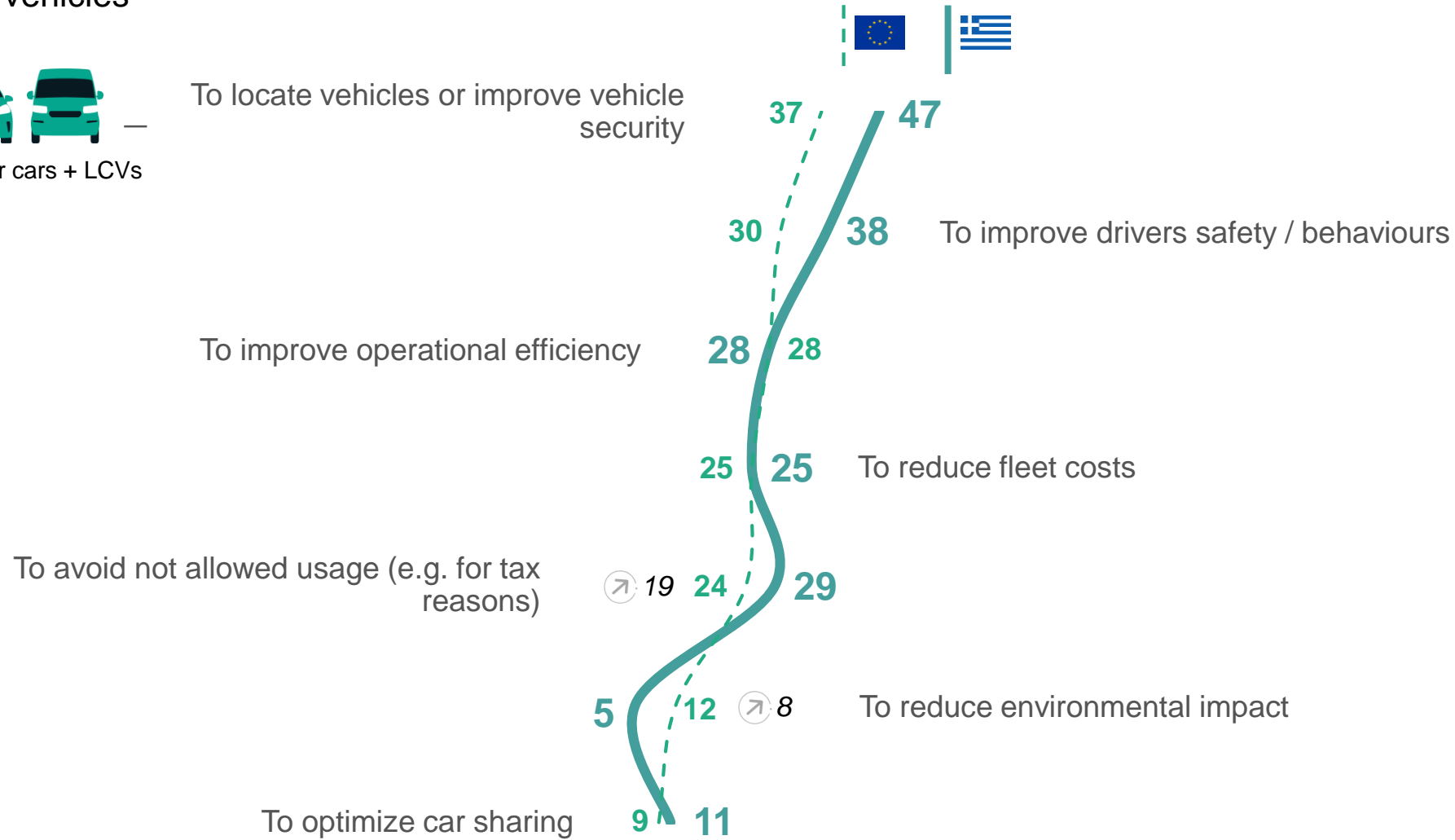
# REASONS FOR USING CONNECTED VEHICLES

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

In %



Passenger cars + LCVs



+



To locate vehicles or improve vehicle security

37 48

To improve drivers safety / behaviours

29 38

To improve operational efficiency

20 26

To reduce fleet costs

23 25

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

17 23 24

To reduce environmental impact

8 12 9

To optimize car sharing

9 9

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

# REASONS FOR USING CONNECTED VEHICLES

All vehicles - Focus on 100 and more

In %



Passenger cars + LCVs



+



To locate vehicles or improve vehicle security

37 46



To improve drivers safety / behaviours

32 37

To improve operational efficiency

30 34

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

21 25 32

To reduce fleet costs

24 27

To reduce environmental impact

3 11 8

To optimize car sharing

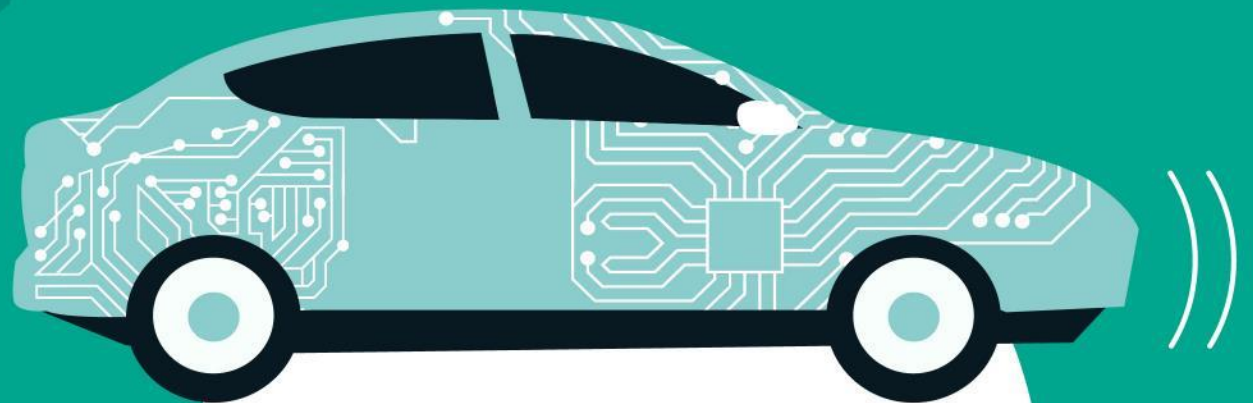
9 12

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

7

# CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY

## A. PASSENGER CARS



# PROPORTION OF COMPANIES USING CONNECTED VEHICLES

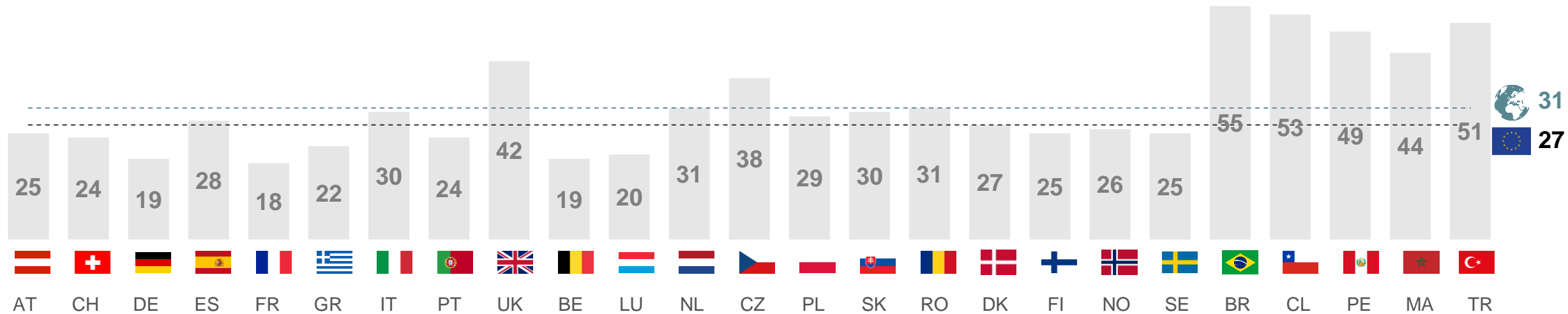
Passenger cars

In %



Passenger cars

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 %

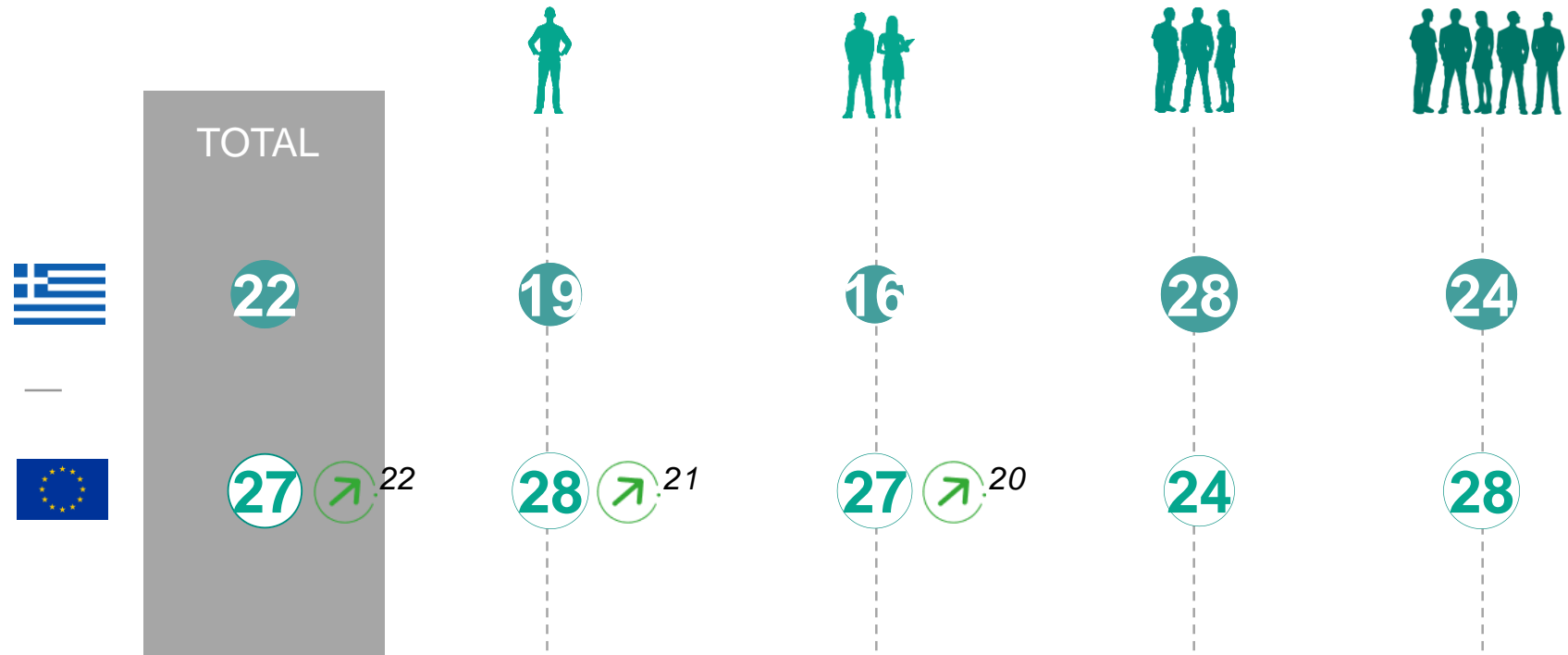


Passenger cars

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

HOW TO READ THE RESULTS ?

22% 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**

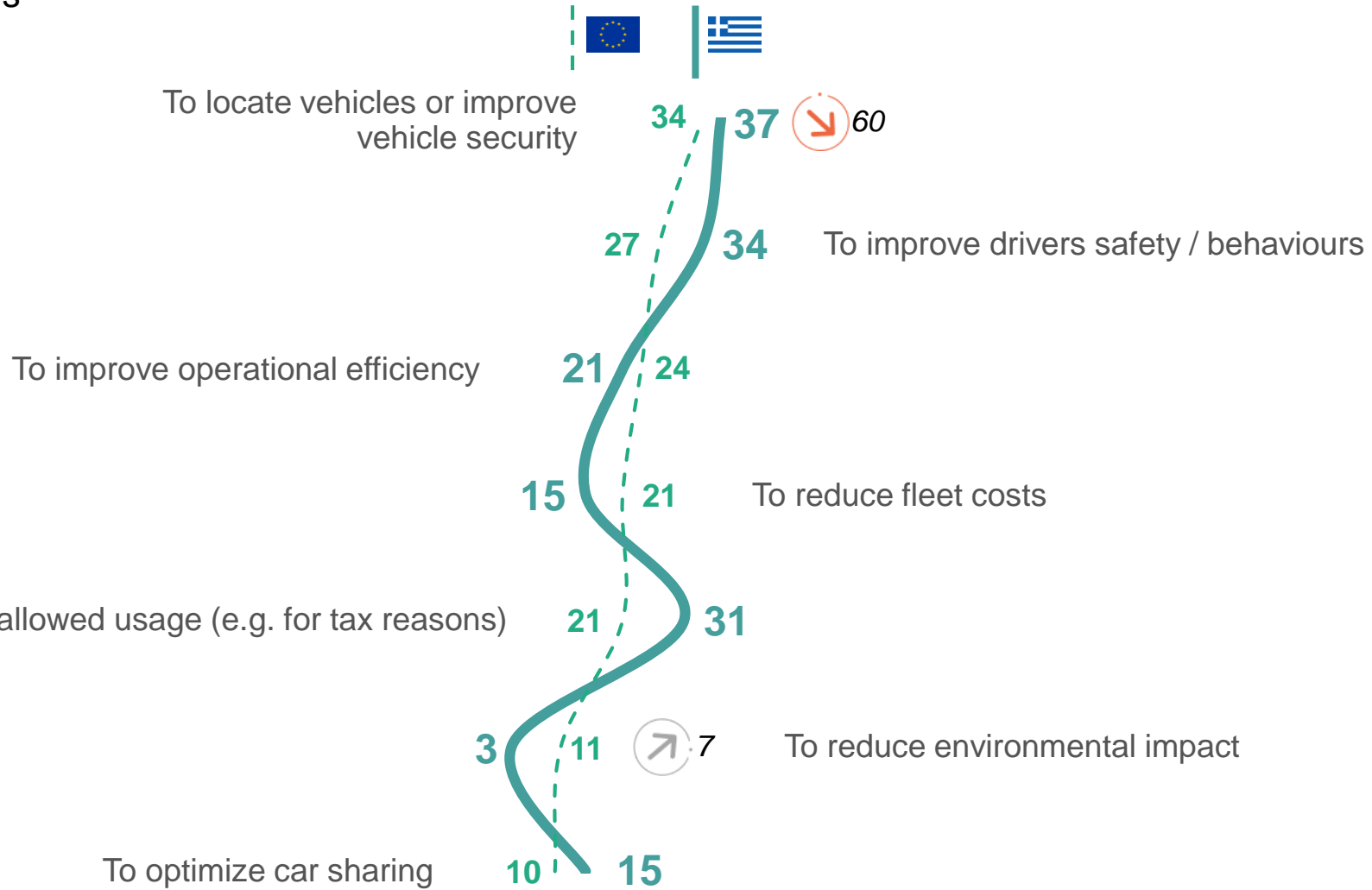
# REASONS FOR USING CONNECTED VEHICLES

## Passenger cars

In %



Passenger cars

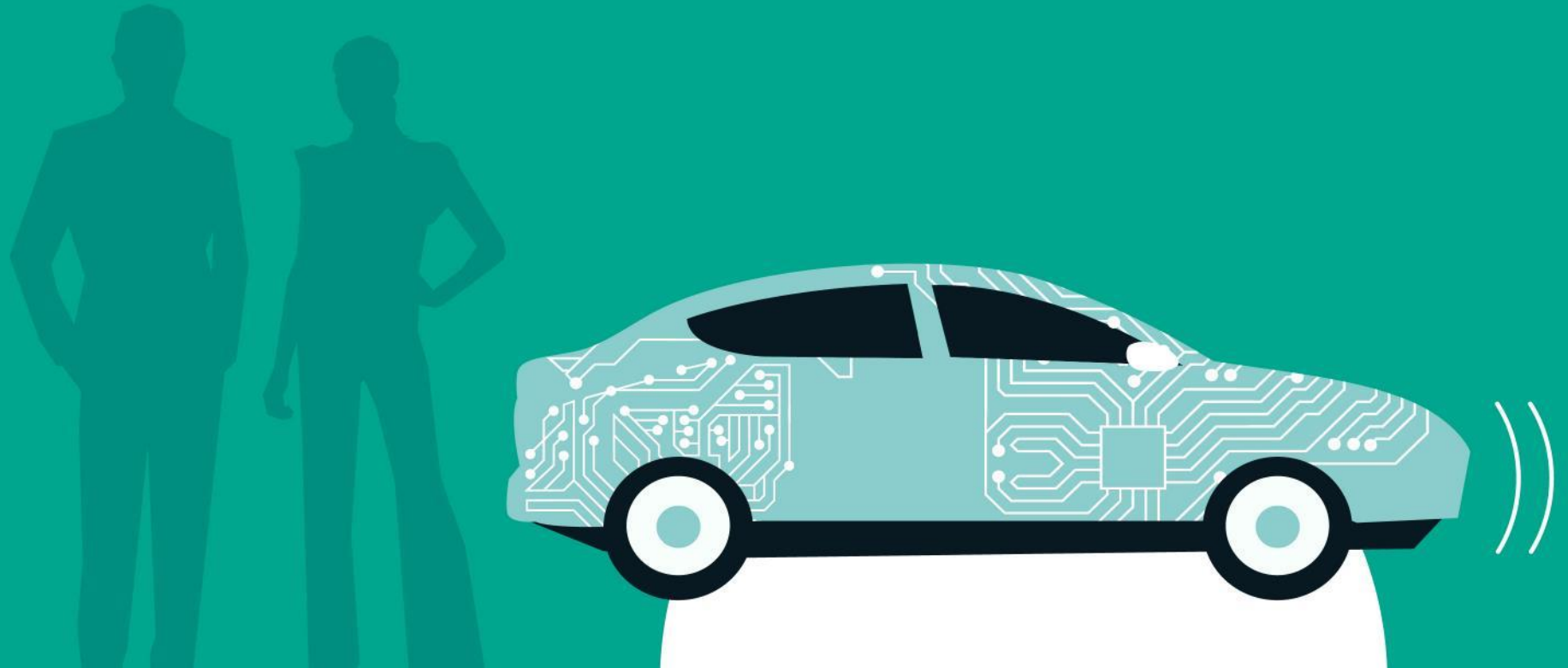


What are the two main reasons why your fleet is connected by Telematics?  
**Basis: companies with connected passenger cars thanks to Telematics**

7

# CONNECTED VEHICLES, DIGITAL TOOLS AND ROAD SAFETY

## B. LCVs





# PROPORTION OF COMPANIES USING CONNECTED VEHICLES

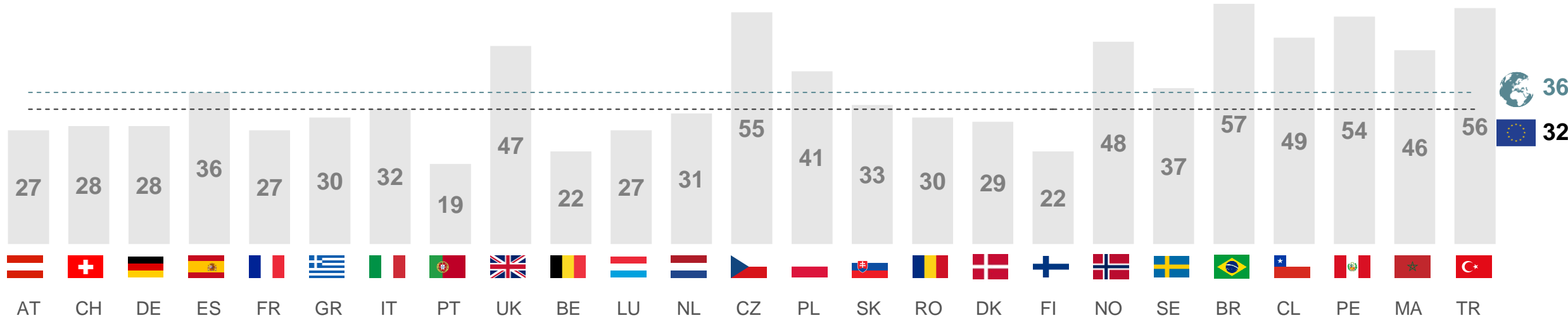
LCVs

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

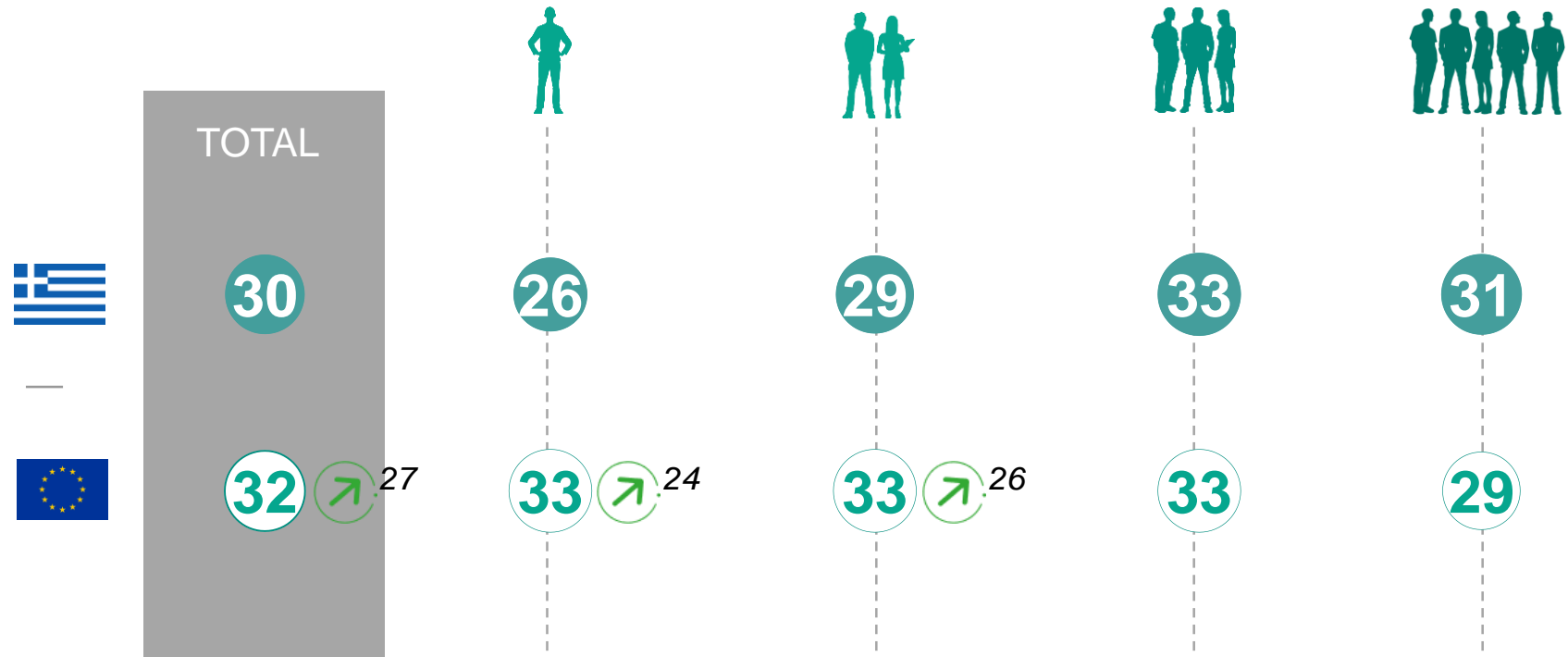
In %



LCVs

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

HOW TO READ THE RESULTS ?  
30% 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**

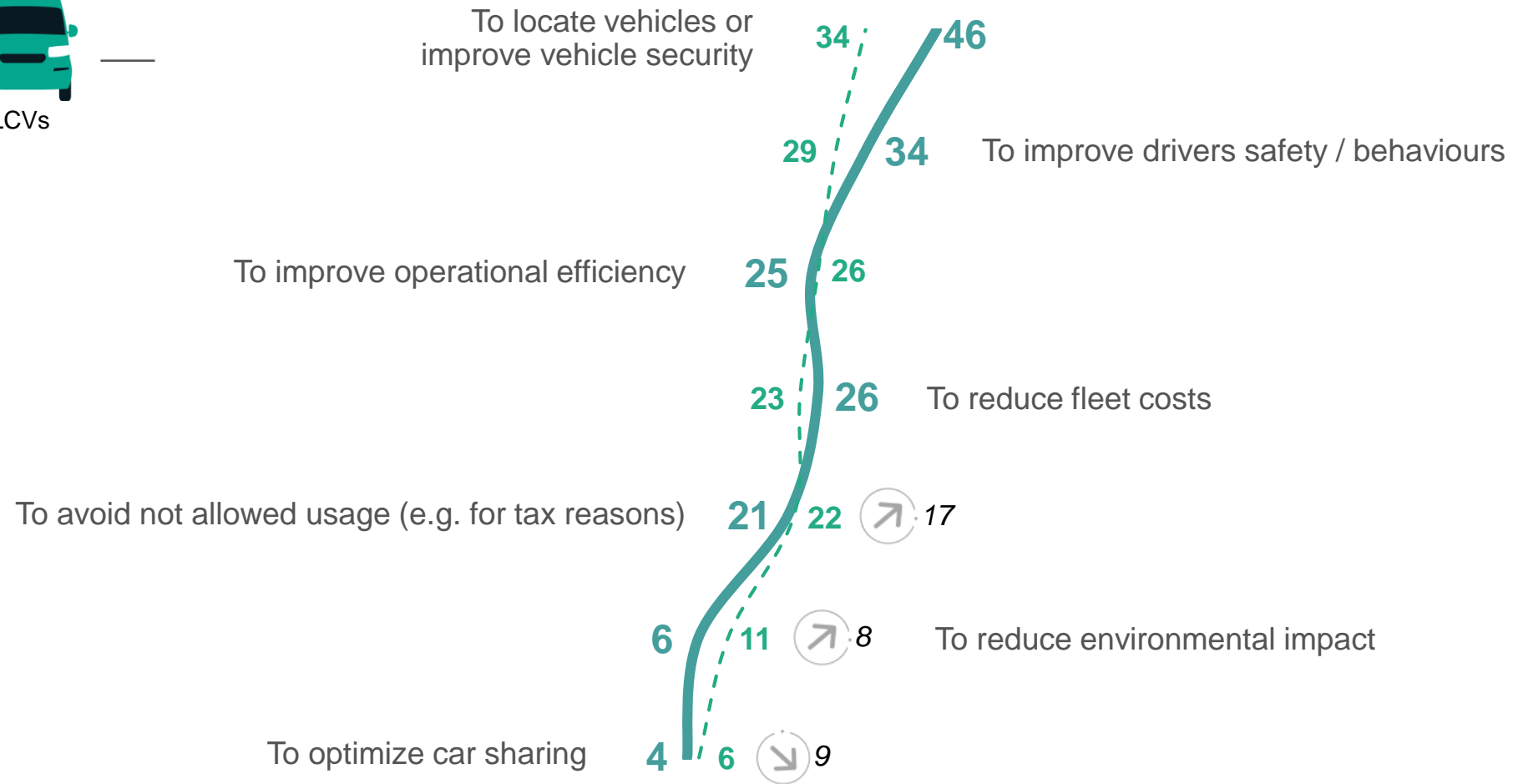
# REASONS FOR USING CONNECTED VEHICLES

LCVs

In %



LCVs



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

The logo for Arval Mobility Observatory, featuring the text "Arval Mobility Observatory" in a green, sans-serif font, enclosed within a green, stylized oval shape.

Arval Mobility  
Observatory

A close-up, low-angle shot of the side of a dark blue car, showing the front wheel and the side panel. The car is parked on a gravel surface with yellow flowers. The background is a blurred scene of green trees under a bright sky.

**Thank you**



# APPENDIX

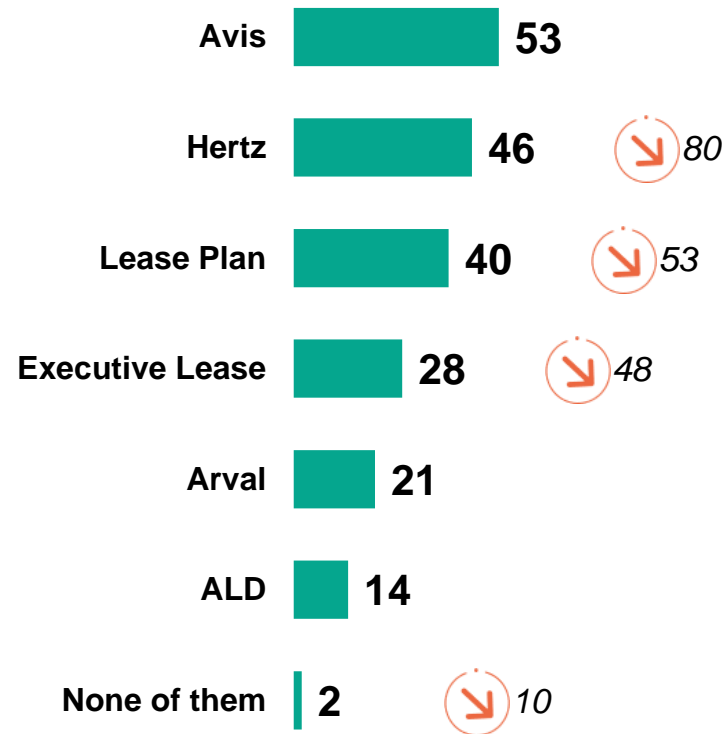


# AWARENESS OF RENTING COMPANIES

In %



Passenger cars + LCVs



**98** % AWARE OF AT LEAST ONE BRAND  
↑ 90

**2.1** Brands on average  
↓ 2.9

Which of the following Renting companies do you know, if only by name?  
Basis: companies with corporate vehicles = 100%