Top Fleet Management Trends in the European Fleet Market

Steven Schoefs
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GLOBAL FLEET SURVEY 2019

Steven Schoefs
Editor in chief Global Fleet
THE SURVEY
107 RESPONDENTS

892,981 Cars
380,641 LCV
4.8 Million Employees
AVERAGE

11,906 CORPORATE VEHICLES
(n = 107, SE = 2,053)

63,735 EMPLOYEES
(n = 107, SE = 12,007)
SIZE DOES MATTER

4,662
NORTH AMERICA
(SE = 2169)

4,942
EUROPE
(SE = 623)

1,662
LATIN AMERICA
(SE = 283)

821
AFRICA-MIDDLE
(EAST) 200

2,100
ASIA-PACIFIC

CORPORATE VEHICLES
GLOBAL MANAGEMENT

64% YES

21% No

15% No

But intend to do
BUSINESS DEPARTMENT

- Procurement: 58%
- HR: 22%
- Fleet: 16%
- Finance: 11%
- Mobility: 7%
- Travel: 5%
GLOBAL FLEET MANAGEMENT

GLOBAL

- Lease company preference
- Safety targets
- Reporting tool choice
GLOBAL FLEET MANAGEMENT

GLOBAL
- Lease company preference
- Safety targets
- Reporting tool choice

REGIONAL
- Car brand choice
- CO2 targets
- Finance method selection
GLOBAL FLEET MANAGEMENT

GLOBAL
• Lease company preference
• Safety targets
• Reporting tool choice

REGIONAL
• Car brand choice
• CO2 targets
• Finance method selection

NATIONAL
• Car budget
• Telematics reporting
• Fuel supplier choice
COUNTRIES TO CHANGE PARTNER

9.9%  8.1%  7.8%

FRANCE  GERMANY  USA
Green Fleet

- Diesel: 61% decrease, 3% increase
- EV: 0% decrease, 75% increase

36% stable
FUTURE OF LEASING

PRIVATE LEASING

DO NOT INTEND: 41%
INTEND: 29%
ALREADY ENGAGED: 30%

USED CAR LEASING

DO NOT INTEND: 73%
INTEND: 6%
ALREADY ENGAGED: 21%

MOBILITY BUDGET

DO NOT INTEND: 26%
INTEND: 59%
ALREADY ENGAGED: 15%
SMART MOBILITY

<table>
<thead>
<tr>
<th></th>
<th>CARPOOLING</th>
<th>CAR SHARING</th>
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<tbody>
<tr>
<td>2019</td>
<td>53%</td>
<td>45%</td>
</tr>
<tr>
<td>2020</td>
<td>44%</td>
<td>63%</td>
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GLOBALFLEET
THE EXECUTIVE NETWORK
MORE INFORMATION ABOUT THE GLOBAL FLEET SURVEY 2019

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Panelists

- **Pim de Weerd** – Global Commodity Manager Mobility, Royal Philips
- **Lukasz Jania** – CEO & Owner, Jania Fleet Mobility
- **Tobias Kern** – Managing Partner, fleetcompetence Group