



# MOBILITY AND FLEET BAROMETER 2024



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# CONTEXT AND METHODOLOGY



# NUMBER OF INTERVIEWS CONDUCTED IN LUXEMBURG

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



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



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



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



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



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# WHAT ARE THE MAIN CHARACTERISTICS OF THE FLEETS?



# FLEET PROFILE



## MOBILITY POLICY

## ADAPTATION

## COINCIDING WITH

## HOMEWORKING



7%

changed the policy or consider changing



15%



## FLEET POSSESSION LENGTH

5.2

years



5.5

years



## ANTICIPATED

## FLEET EVOLUTION

(% will increase or remain stable)

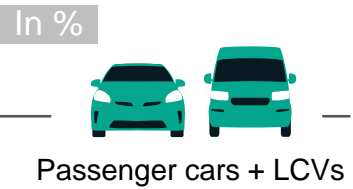
92%



91%



# REASON FOR FUTURE FLEET INCREASE



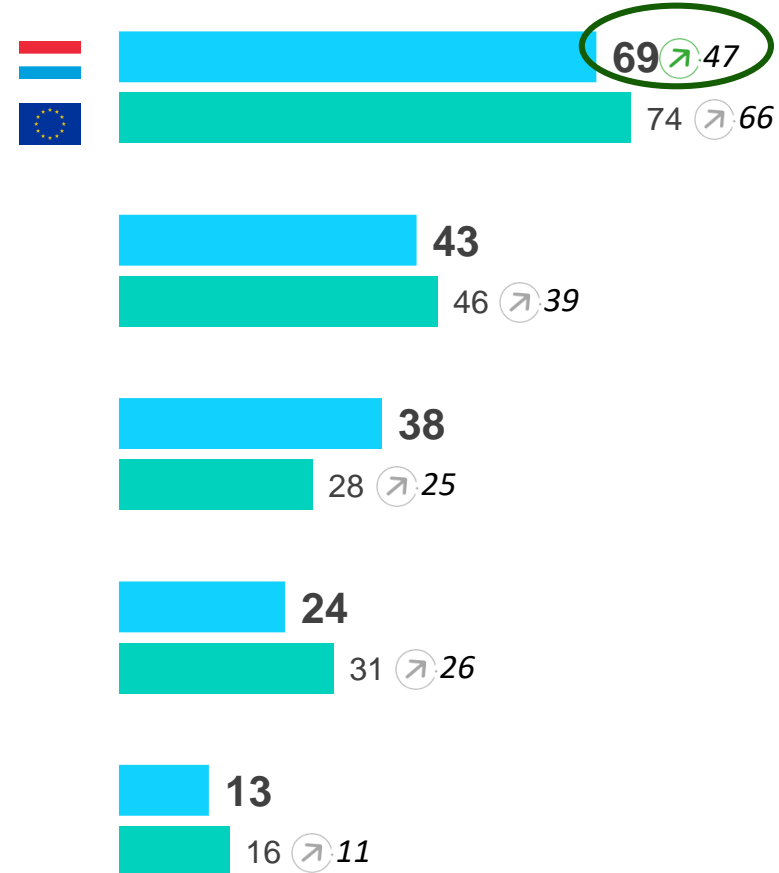
Because your company is growing or developing a new activity that requires company vehicles

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

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

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

Because of tax decreases



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

# SECOND-HAND VEHICLES FOR PASSENGER CAR FLEET

## HOW TO READ THE RESULTS ?

In Luxembourg, 73% of the companies are already using or consider to use second-hand vehicles in the next 3 years. 38% of the companies are currently using some.

In %



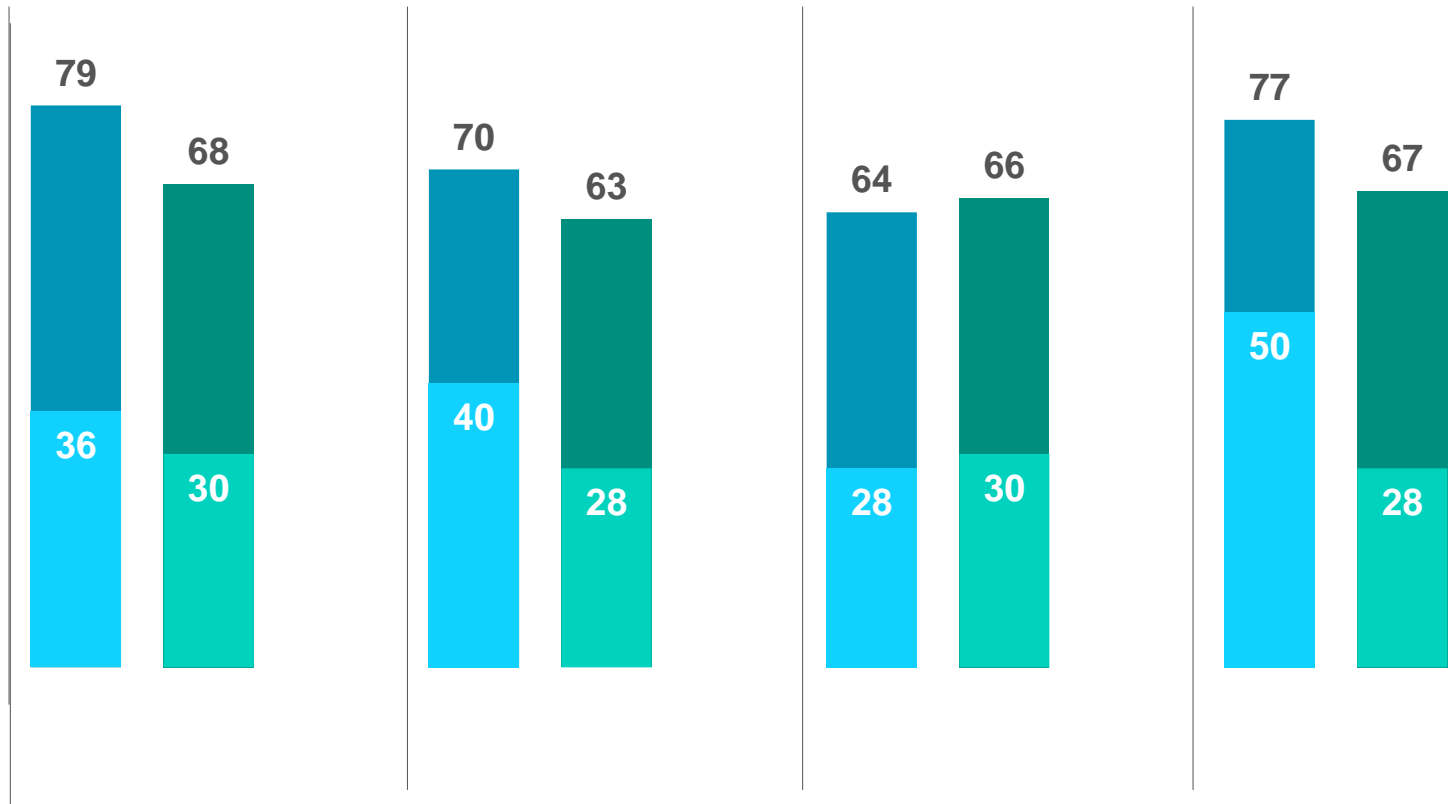
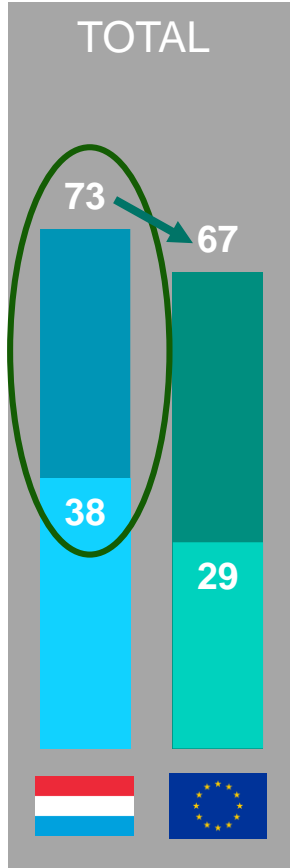
Passenger cars



ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS



ALREADY USING



New question added in 2024

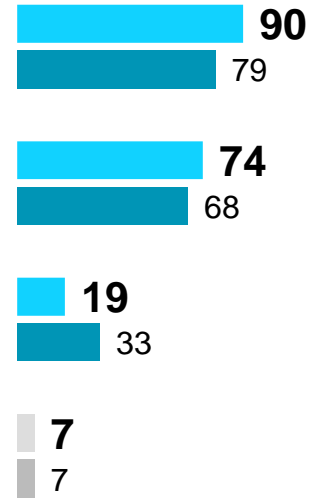
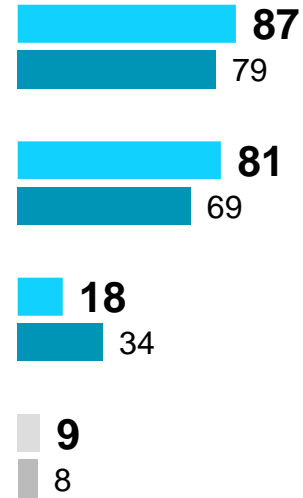
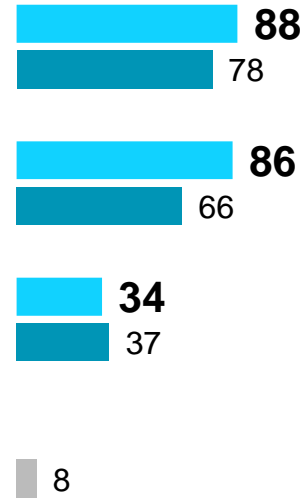
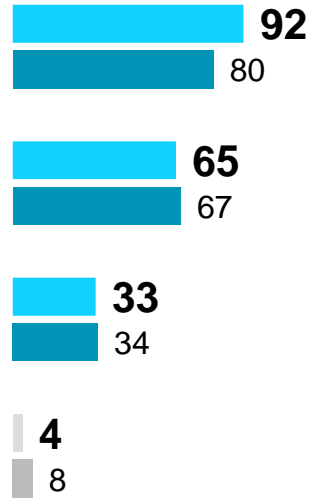
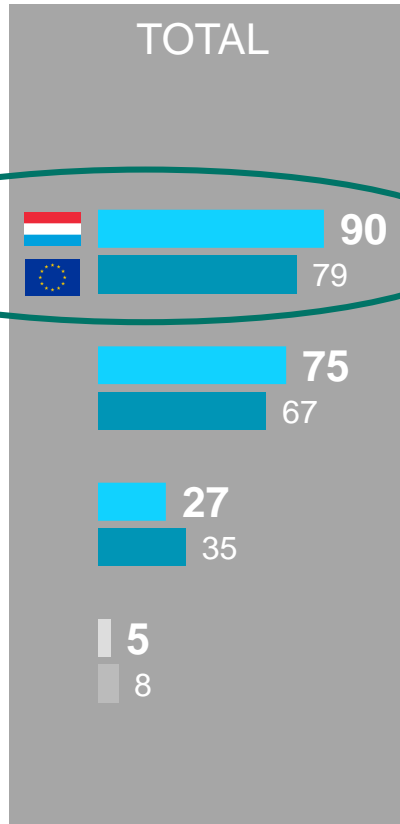
Do you have used/second-hand vehicles in your fleet or do you consider having some in the next three years?

Basis: companies with passenger cars



# TYPE OF USE OF USED / SECOND-HAND PASSENGER CARS

In %



# SECOND-HAND VEHICLES FOR LCVS CAR FLEET

## HOW TO READ THE RESULTS ?

In Luxemburg, 48% of the companies are already using or consider to use second-hand vehicles in the next 3 years. 12% of the companies are currently using some.

In %



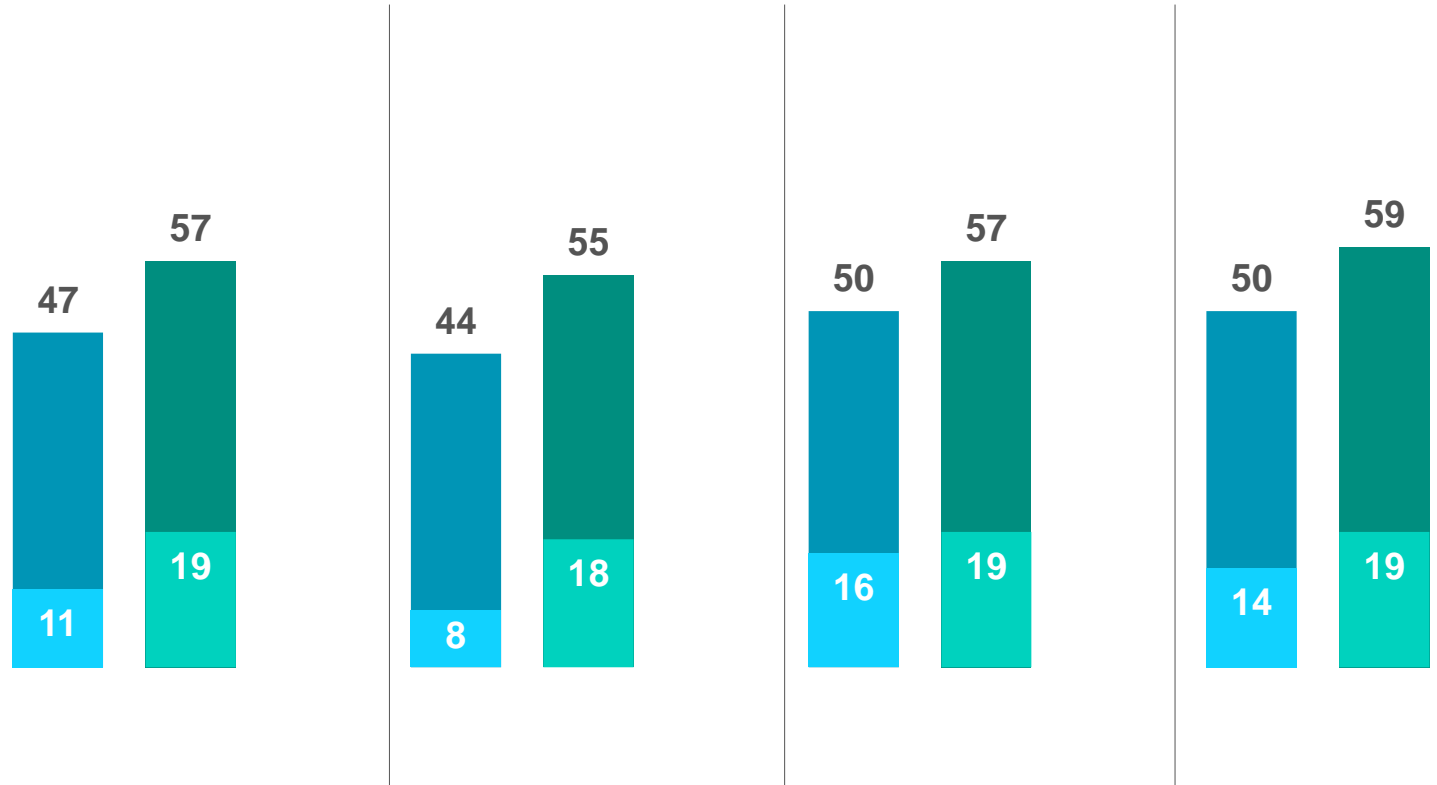
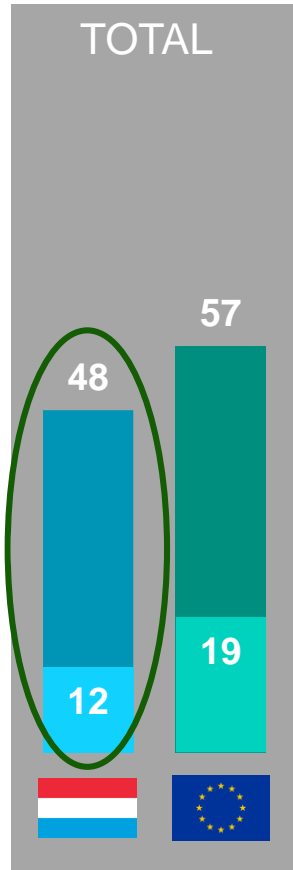
LCVs



ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS



ALREADY USING



New question added in 2024

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

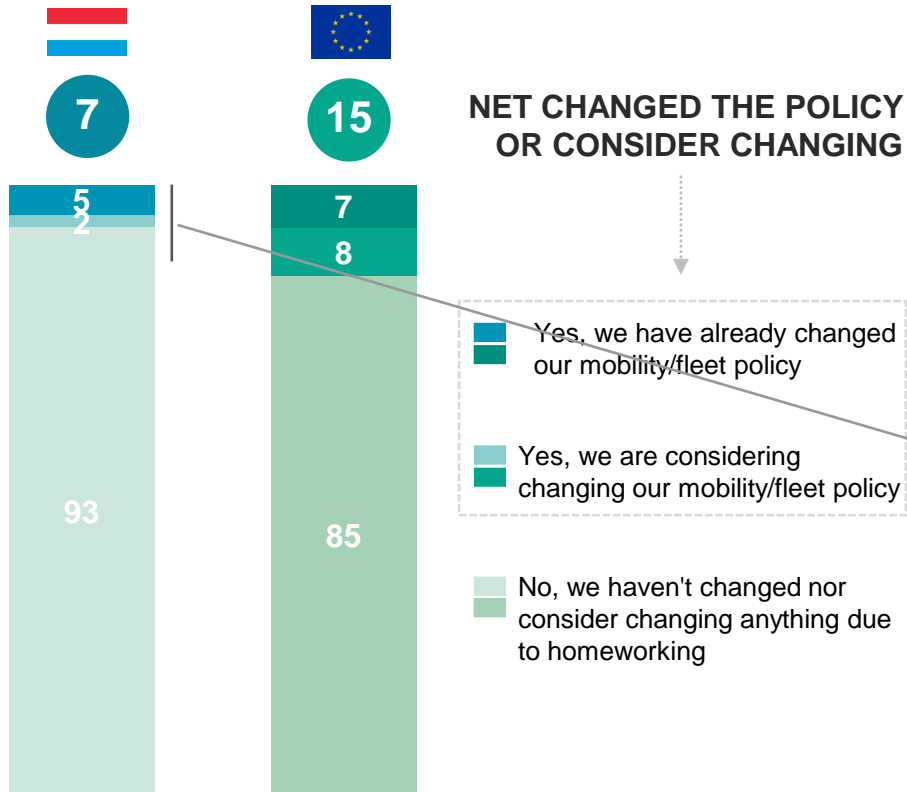
Basis: companies with LCVS

# MOBILITY POLICY ADAPTATION COINCIDING WITH HOMEWORKING

In %

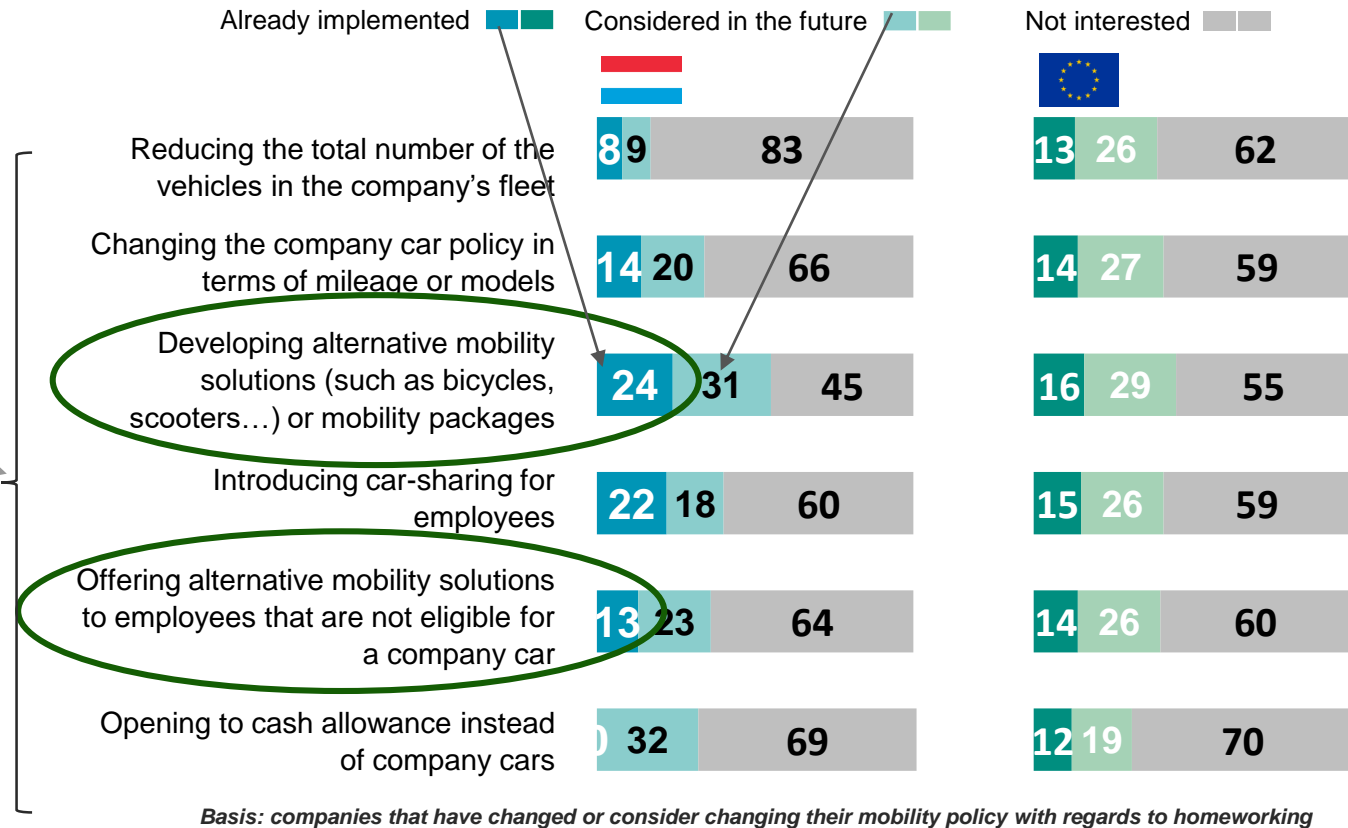


Passenger cars + LCVs



## HOW TO READ THE RESULTS ?

In Luxembourg, among the companies that changed or consider changing their mobility policy, 8% have already reduced the total number of the vehicles in the company's fleet.



Basis: companies with corporate vehicles = 100%

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

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

Question asked to respondents that are aware of mobility solutions

# MOST IMPORTANT CHALLENGES EXPECTED

In %



Nb 1 challenge

Top 3 challenges

Passenger cars + LCVs

Implementing alternative fuel technologies (100% electric vehicles, hybrids, rechargeable hybrids)

14% 28%

Adapting to restrictive public policies on petrol and diesel vehicles

12% 32%

Inducing more responsible driving among employees

14% 27%

Managing longer vehicles' delivery time

10% 29%

Mitigating the increase of total cost of ownership of the vehicles

9% 26%

Adapting to the expansion of low emission zones in urban areas

6% 22%

Adjusting to new ways of working (hybrid between home and office)

18% 24%

Adapting to evolutions of car selling models (ex. directly from manufacturer without buying through car dealer)

8% 20%

Implementing other mobility solutions (ex. car sharing, bikes...)

8% 19%



15% 34%

14% 32%

12% 27%

11% 27%

11% 27%

11% 25%

10% 23%

9% 22%

8% 20%

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# HOW ARE COMPANIES FINANCING THEIR FLEET?



# FINANCING



**OUTRIGHT PURCHASE**

15%



**CREDIT**

11%



**OPERATING LEASING**

36%



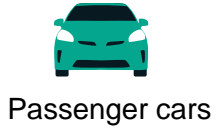
**FINANCIAL LEASING**

36%

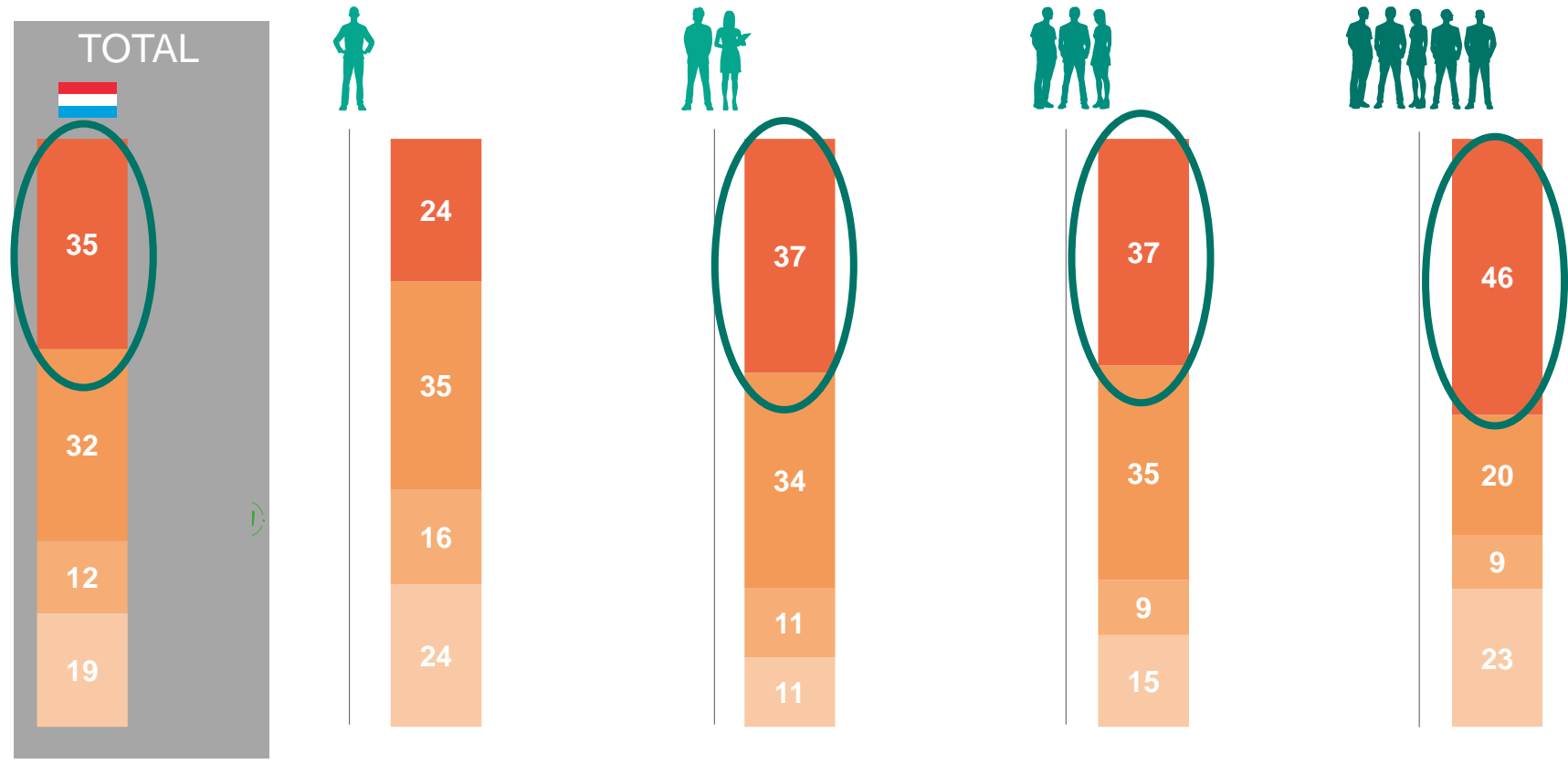


# MAIN PASSENGER CARS FINANCING METHOD

In %



- Operating leasing
- Financial leasing
- Credit
- Outright purchase



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

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





# ENERGY MIX



AT LEAST ONE ALTERNATIVE

IMPLEMENTED OR CONSIDERED\*

for Passenger cars

ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS

72%



77%



AT LEAST ONE ALTERNATIVE

IMPLEMENTED

for Passenger cars

58%

47



59%



EXPECTED PART OF 100%

ELECTRIC PASSENGER CAR IN 3 YEARS

9%



20%



EXPECTED PART OF 100%

ELECTRIC LCV IN 3 YEARS

3%



13%



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

# CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

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

In %

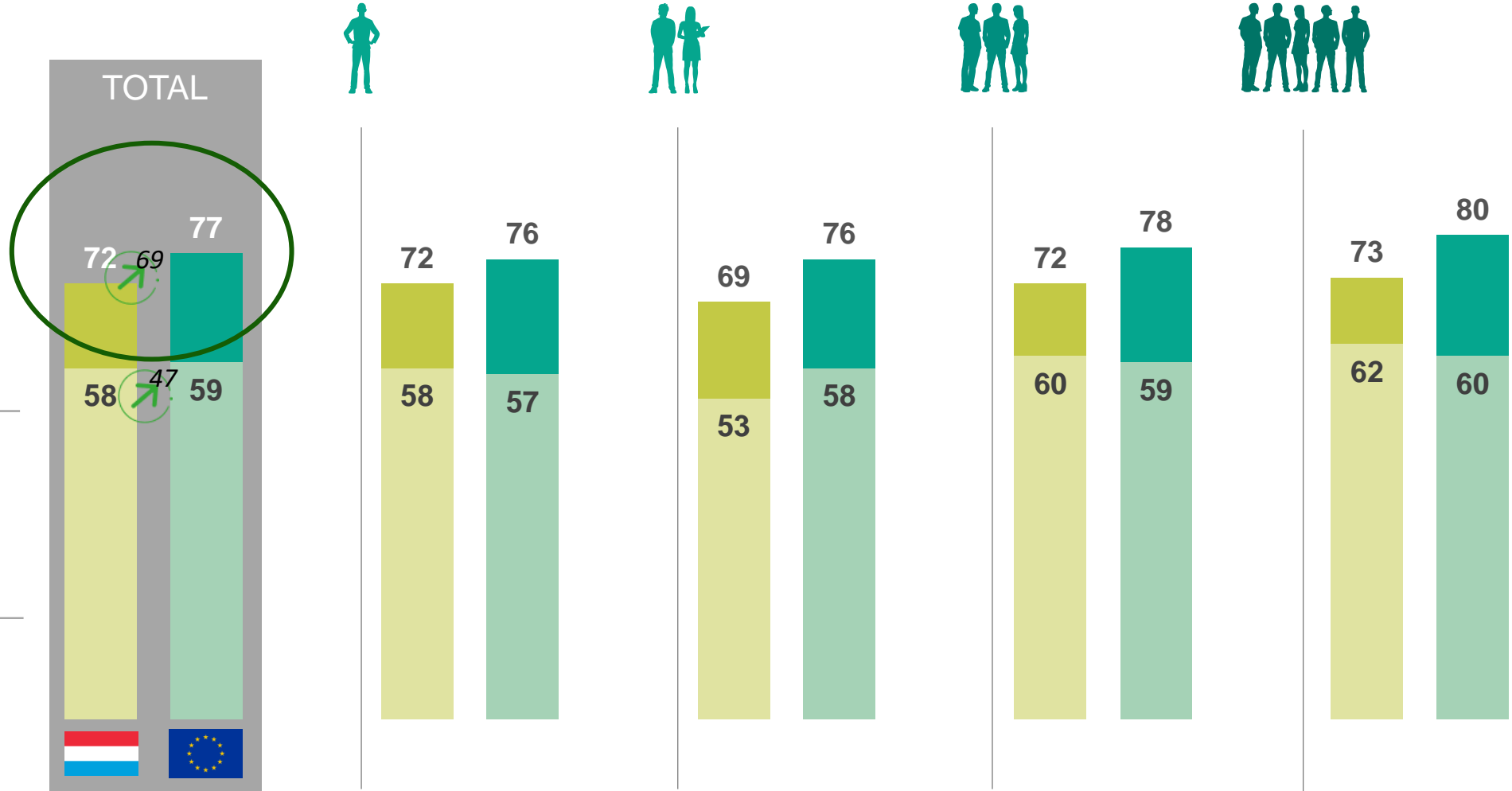
Passenger cars



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



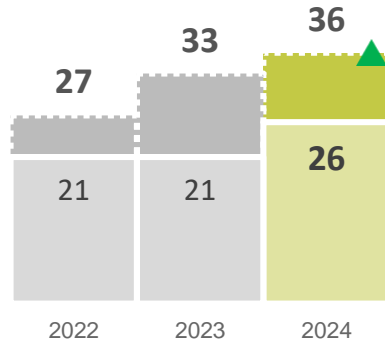
ALREADY USING OR CONSIDER USING IN THE NEXT 3 YEARS



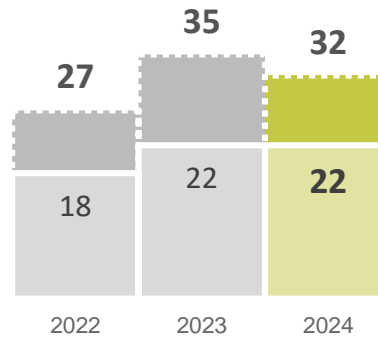
ALREADY USING



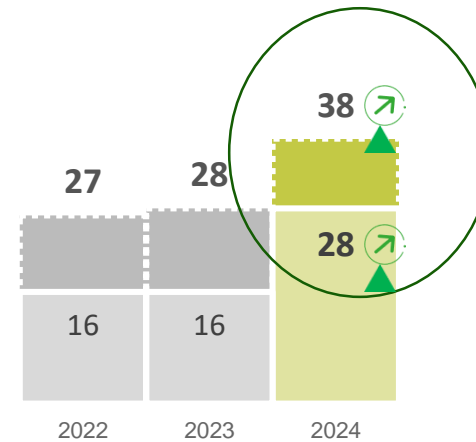
Plug-in Hybrid



Hybrid



100% Battery Electric Vehicle



Technology	2022	2023	2024
EU (Binoculars)	37	44	43
EU (Car with plug)	24	29	29
Plug-in Hybrid (Binoculars)	37	33	36
Plug-in Hybrid (Car with plug)	21	21	26
Hybrid (Binoculars)	38	44	42
Hybrid (Car with plug)	18	22	22
100% BEV (Binoculars)	34	40	42
100% BEV (Car with plug)	16	16	28

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**

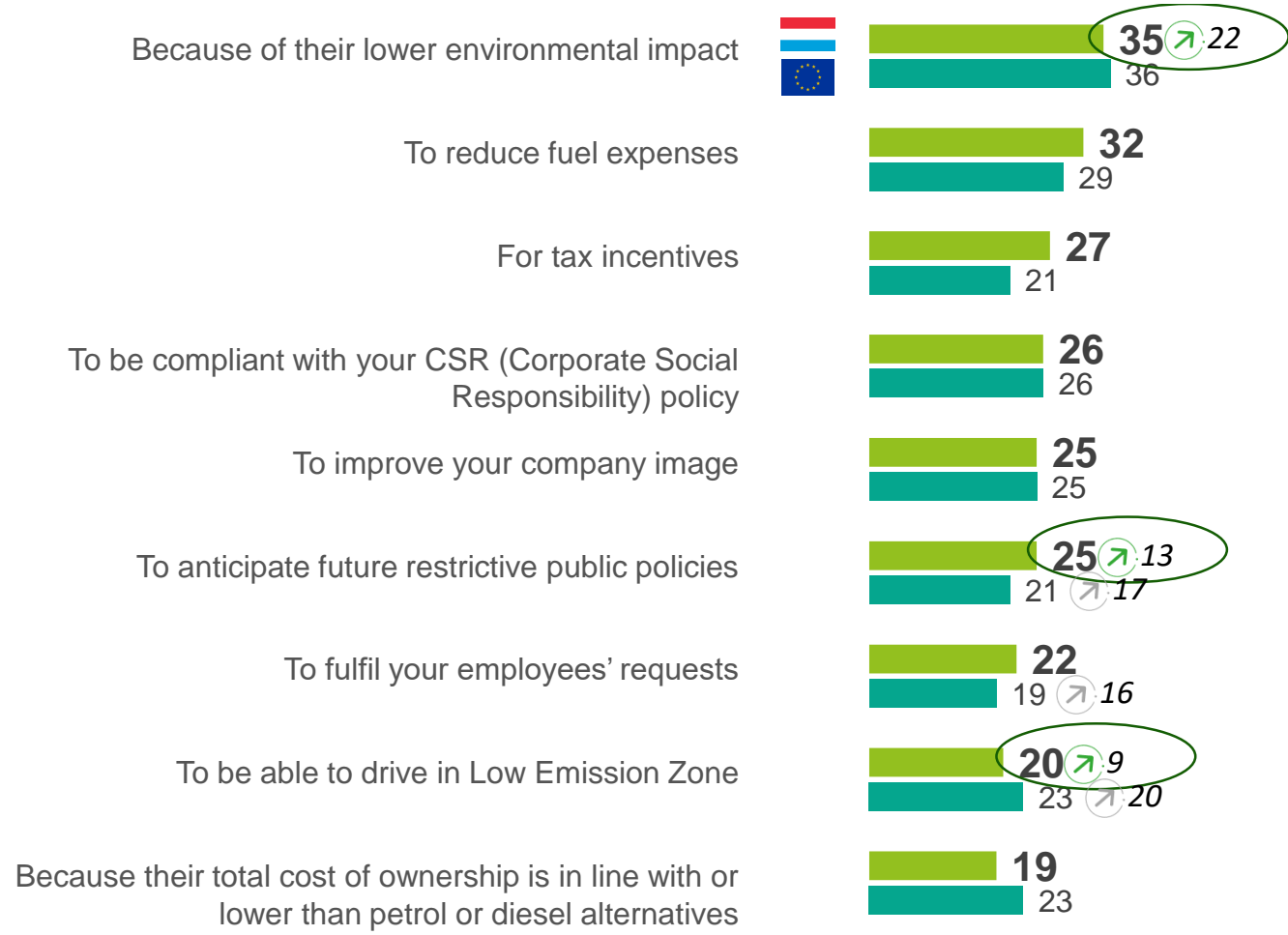
# REASONS FOR IMPLEMENTING OR CONSIDERING ALTERNATIVE FUEL TECHNOLOGIES

## 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

# CONSTRAINTS OF 100% BATTERY ELECTRIC VEHICLE USAGE

In %



Passenger cars + LCVs

do not consider implementing battery electric vehicles

No charging points at your company offices

The purchase price is higher than a regular fuel car

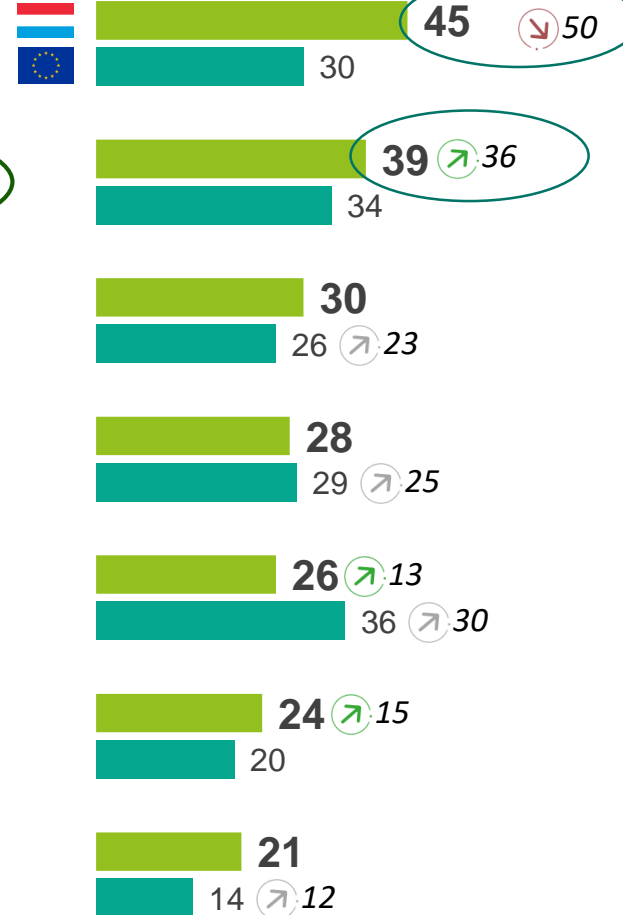
The range of models is limited for this type of vehicles

No charging solutions at your employees' home

Not enough public charging points

The questions raised on their reliability

Your employee's reluctance to drive electric vehicles



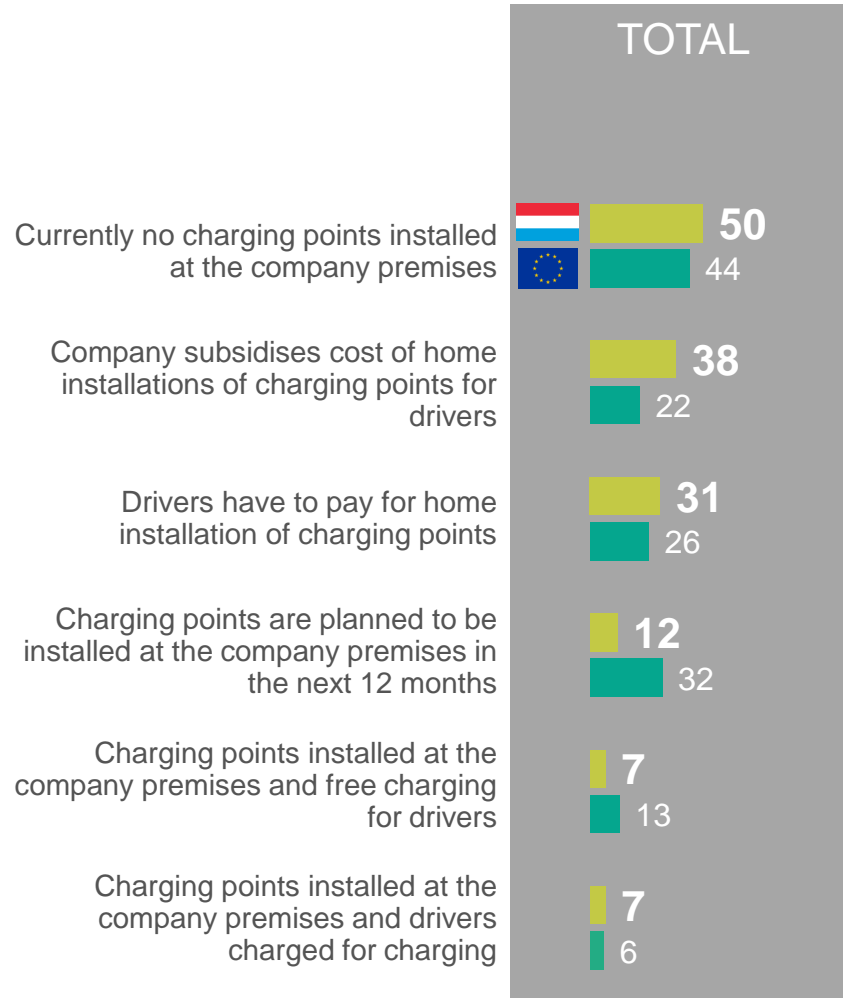
What are the constraints of using 100% Battery Electric vehicles?  
Basis: Not considering implementing 100% BEV technology

# ACCESS TO CHARGING POINTS

In %



Passenger cars + LCVs



Multiple answers - % don't add up to 100%

In terms of charging point installation and responsibility for the cost of charging for battery electric and plug-in hybrid vehicles in your company...?

Basis: companies already using or considering BEV/PHEV for passenger cars or BEV for LCV

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# WHAT ARE THE PERSPECTIVES IN TERMS OF MOBILITY SOLUTIONS?



# MOBILITY SOLUTIONS LIST AND DEFINITIONS



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



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



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



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



**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**



# MOBILITY SOLUTIONS



## TOP 3 USED SOLUTIONS

#1

Public transport



25%



23% 21

#2

Car or cash allowance

21%

17%

#3

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

19%

18%



## TOP 3 POTENTIAL NEXT 3 YEARS

#1

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



34%



31%

#2

Public transport



34%

32% 30

#3

Car or cash allowance

28%

27%

# MOBILITY SOLUTIONS IMPLEMENTATION

At least one already implemented

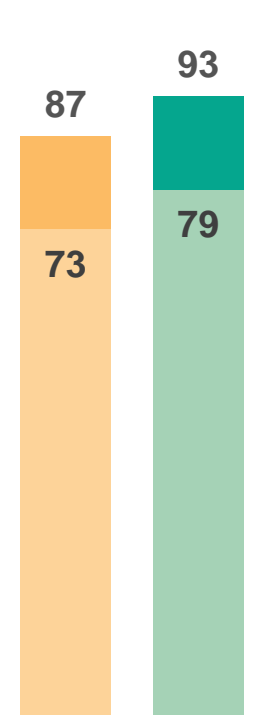
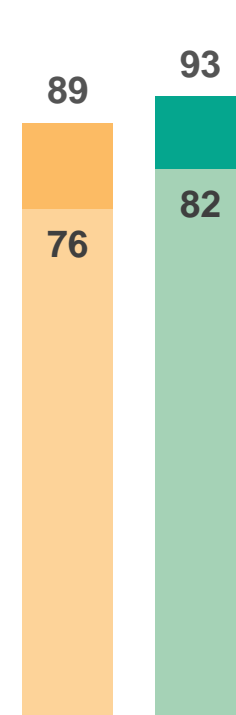
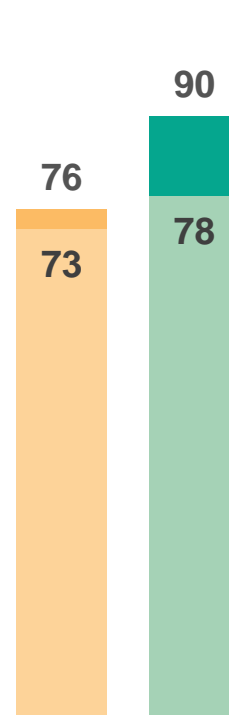
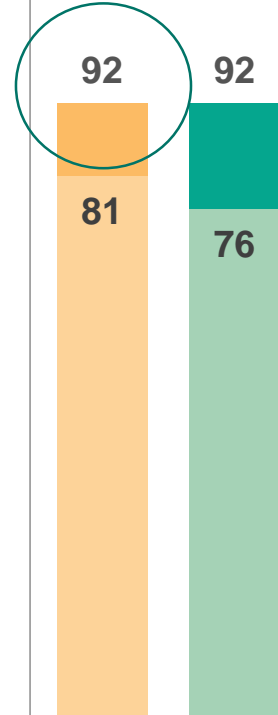
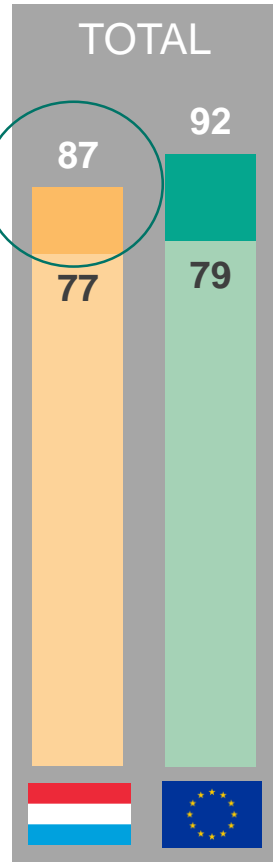
In %



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 %

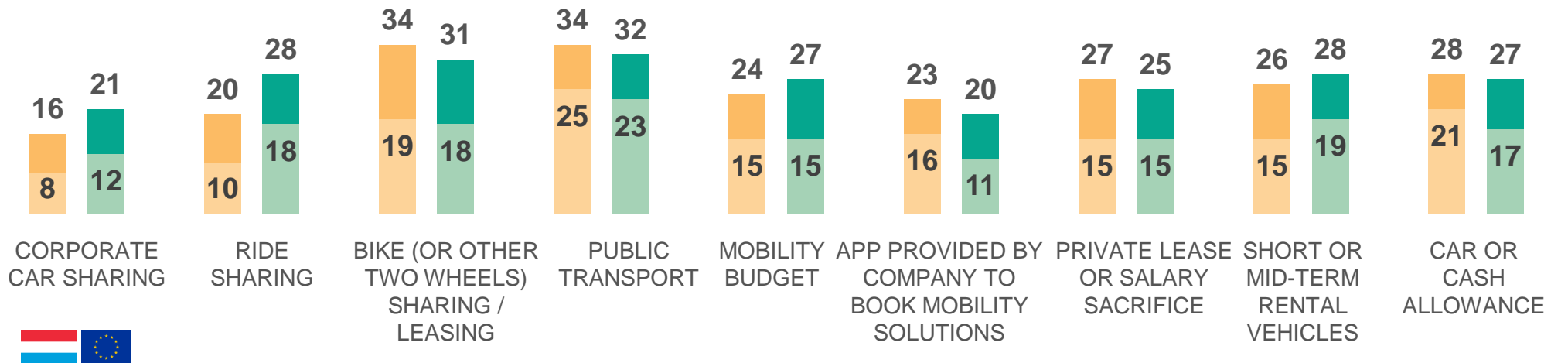
**77%** Of companies have already implemented at least one of these solutions



ALREADY USING OR CONSIDER IN THE NEXT 3 YEARS



ALREADY USING

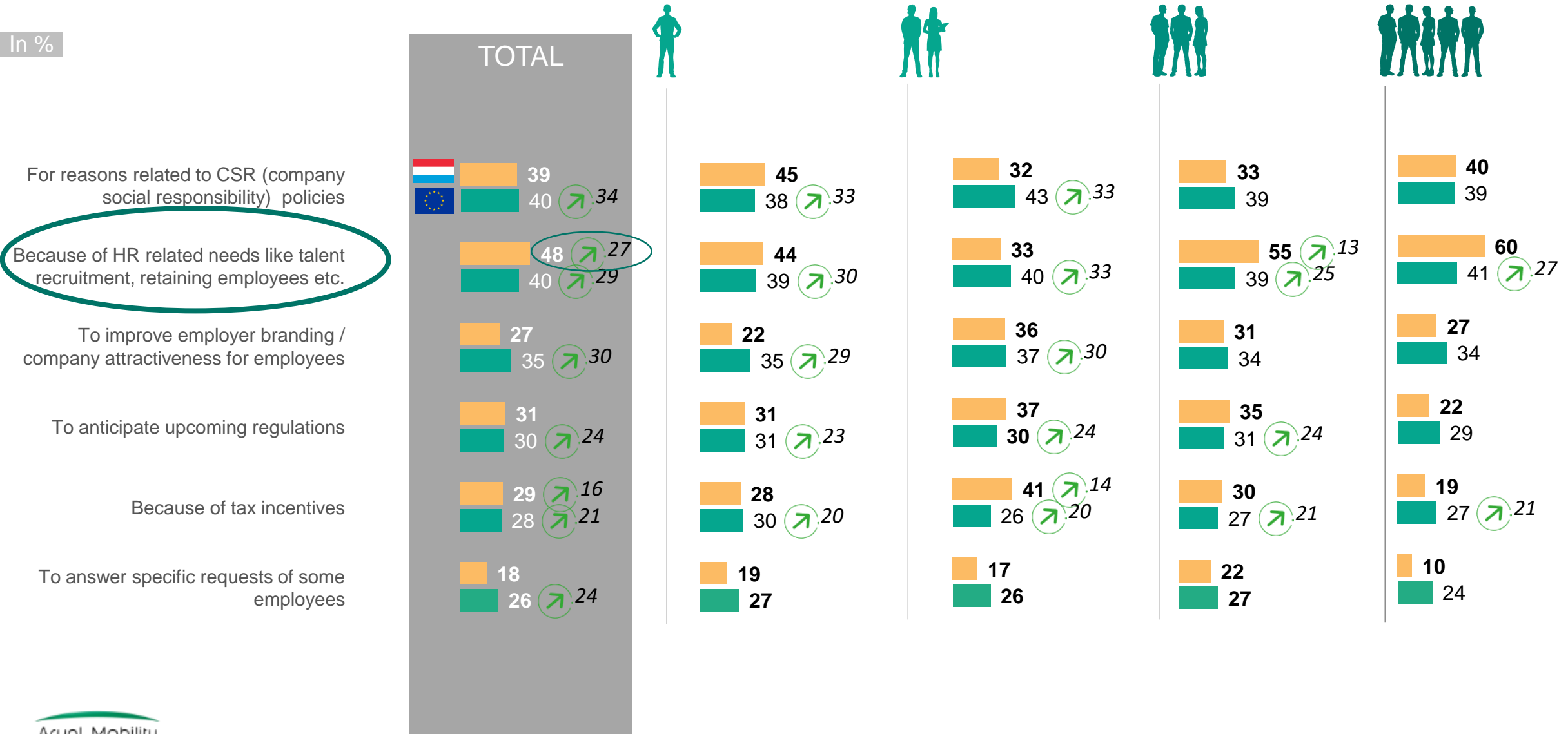


Which of the following have you implemented or will you implement in the next 3 years?  
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Question asked to respondents that are aware of mobility solutions

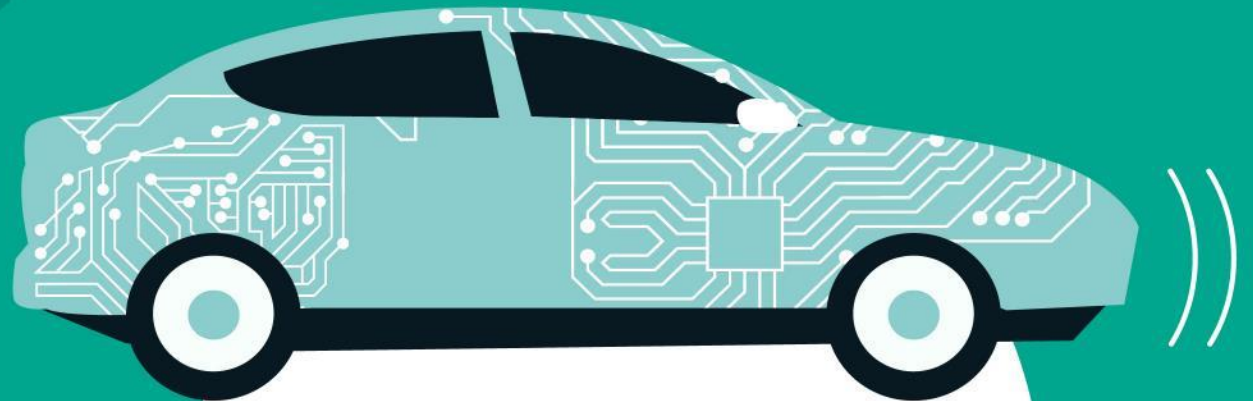
# REASONS FOR IMPLEMENTING OR CONSIDERING MOBILITY SOLUTIONS

In %



7

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



# CONNECTED VEHICLES



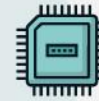
## USE OF CONNECTED VEHICLES



36%



38%



## USE OF TELEMATICS DATA



19%



15%

Already using data

# PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

All vehicles

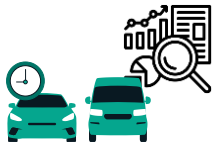
In %



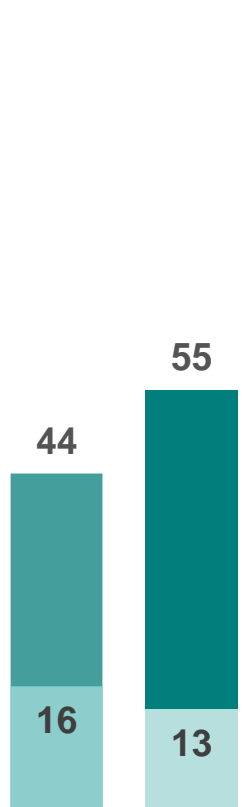
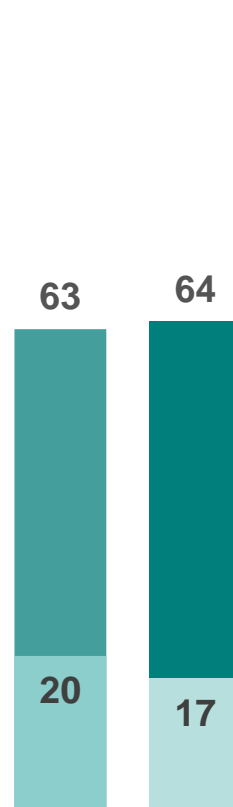
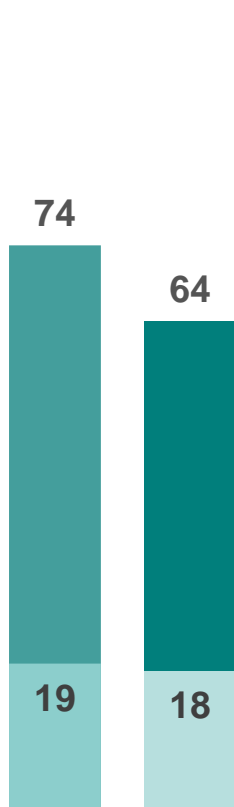
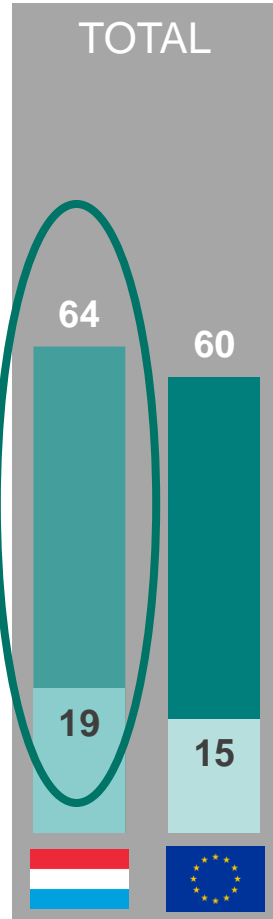
Passenger cars + LCVs



ALREADY USING  
OR CONSIDER IN  
THE NEXT 3  
YEARS



ALREADY  
USING



New question added in 2024

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



**Thank you**

