KANTAR

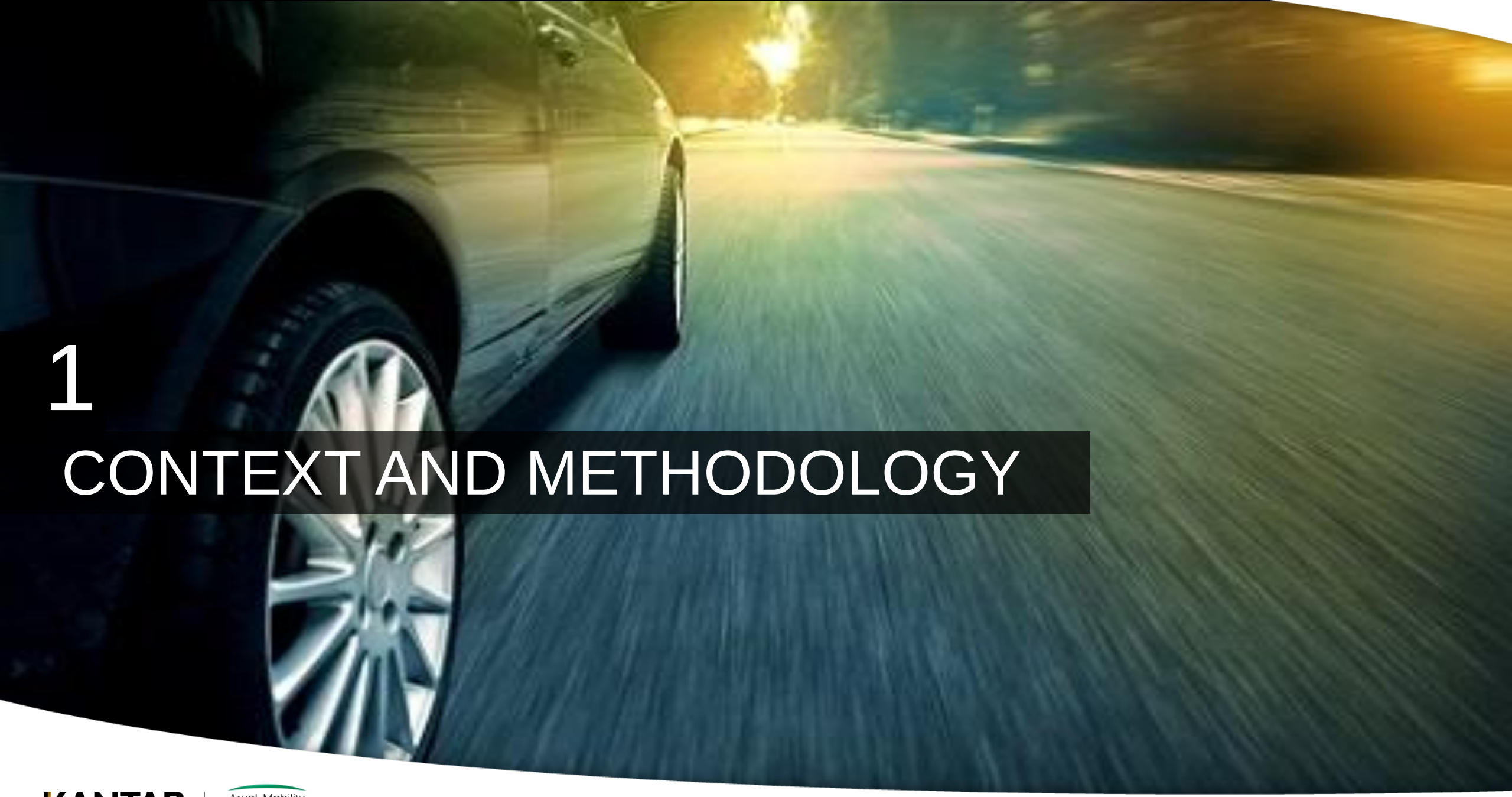
Arval Mobility Observatory

2020 FLEET BAROMETER

Norway

April 2020 / Survey n°1800954

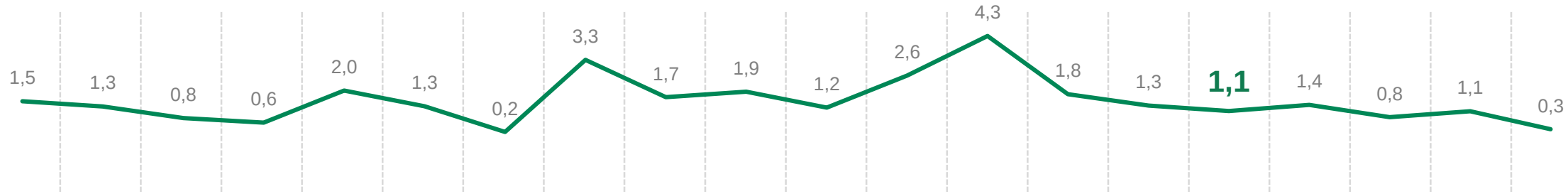
2020 FLEET BAROMETER



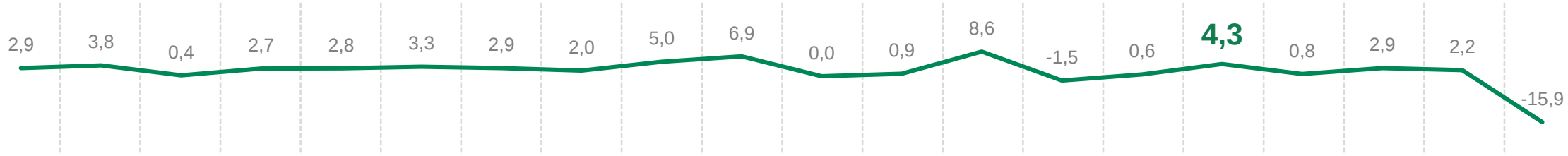
1 CONTEXT AND METHODOLOGY

GLOBAL ECONOMIC CONTEXT PER COUNTRY

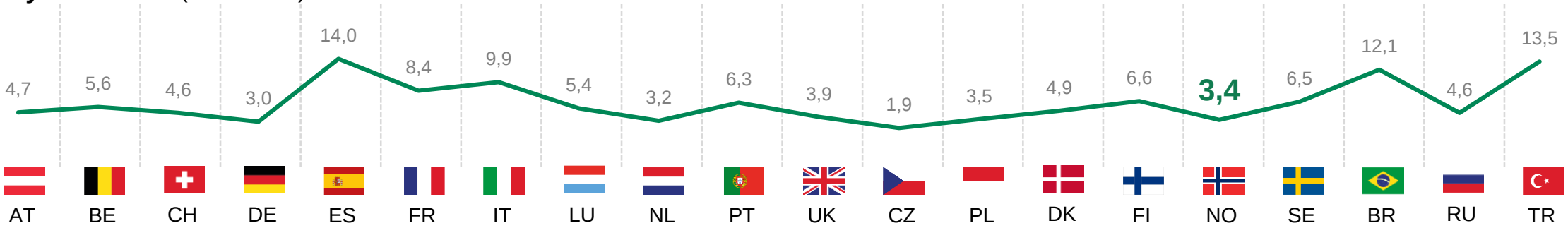
GDP growth in volume in 2019 (Source OECD)



Investment growth in volume in 2019 (Source OECD)



Unemployement rate (source ILO)



KEY THEMES FOR ARVAL MOBILITY OBSERVATORY

— 1

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

(Context: advanced electrification, absence of taxes for LCVs, objective to ban new ICE cars sales by 2025, and new incentive for electric LCVs)

— 2

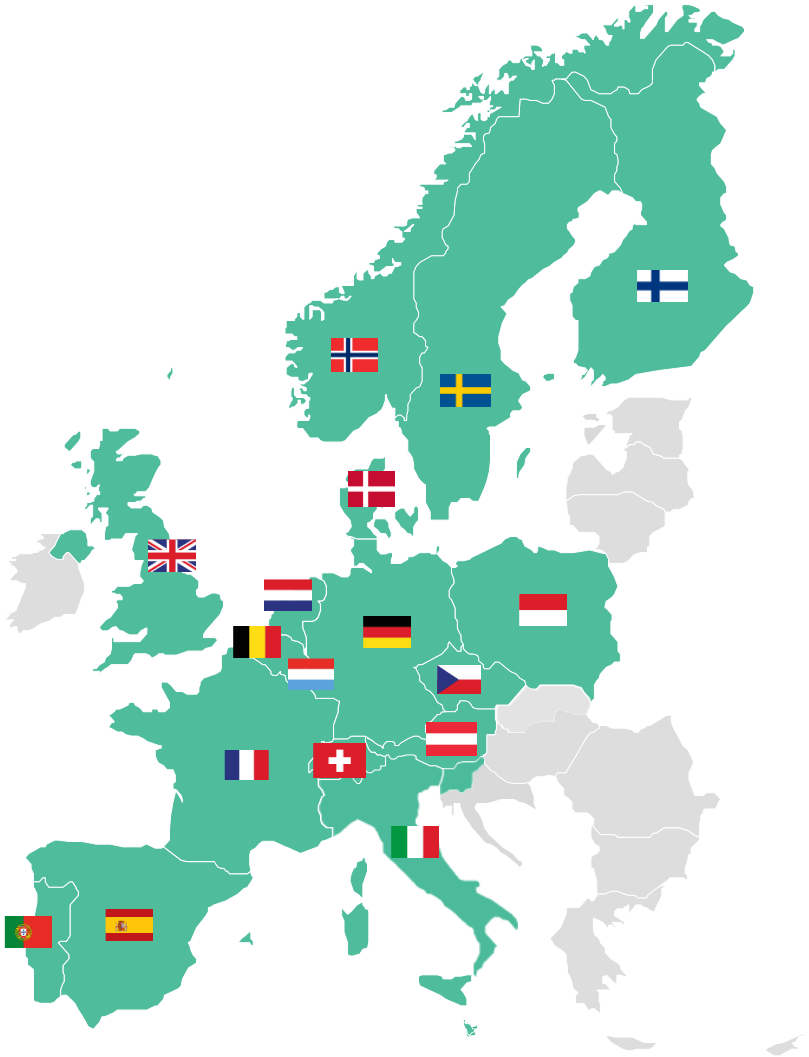
HOW WILL NEW MOBILITY SOLUTIONS WILL AFFECT BUSINESS MODELS?

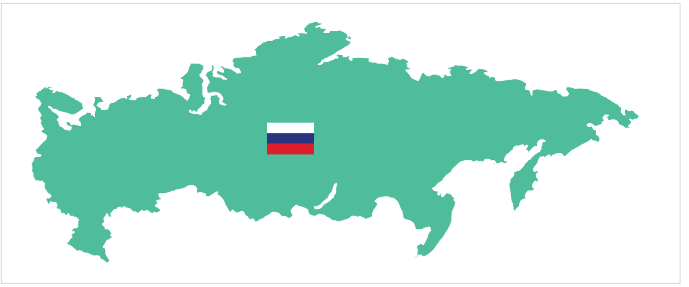
(Context: electronic tolls for all big cities access in ordrer to promote alternative mobility solutions, developement of BtoC and BtoB car sharing solutions in Oslo)

— 3

HOW DOES DIGITALISATION IMPACT FLEETS? (Electronic services, telematics…)

PERIMETER OF THE STUDY





METHODOLOGY

DATA COLLECTION METHOD

MIX OF 2 DATA COLLECTION MODES

1. CATI SYSTEM
(Computer Assisted Telephone Interviewing)

2. CATI CAWI SYSTEM
Recruitment by telephone and a link is sent to complete the survey online

FIELDWORK PERIOD

JAN 22 → MAR 16

TARGET

FLEET MANAGERS
in companies of all industries using at least
1 CORPORATE VEHICLE

QUOTAS

COMPANY SIZE & SECTOR

SAMPLE

4 794 | through Europe

806 | out of Europe (Brazil, Turkey)

5 600 | Interviews in total

DURATION OF INTERVIEW

20 minutes on average

NUMBER OF INTERVIEWS CONDUCTED IN NORWAY

Perimeter of the survey: companies owning at least 1 vehicle

Companies with less than 10 employees
75 INTERVIEWS

Companies with 10 to 99 employees
58 INTERVIEWS

Companies with 100 to 249 employees
38 INTERVIEWS

Companies with 250 employees and more
79 INTERVIEWS

1 to 99 employees
133 INTERVIEWS

100 employees and more
117 INTERVIEWS

SAMPLE STRUCTURE IN NORWAY

In %

Company size & sector					TOTAL
Construction	13	13	13	13	13
Industry	32	32	32	32	32
Services	34	34	34	34	34
Trade	21	21	21	21	21
Number of completes	**100**	**60**	**80**	**60**	
Weight of each company size segment	33	20	27	20	

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

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2

MAIN RESULTS

GLOBAL COUNTRY INSIGHT: AN ADVANCED MARKET IN THE TRANSITION TO NEW ALTERNATIVES, LEAD BY BIG COMPANIES.

GLOBAL COUNTRY INSIGHT : AN ADVANCED MARKET IN THE TRANSITION TO NEW ALTERNATIVES, LEAD BY BIG COMPANIES.

#1

A SMALL MARKET
as compared to Europe

#2

THE LEADER MARKET IN EUROPE,
in the energy mix transition.

#3

BIG COMPANIES LEAD THE WAY,
in the adoption of mobility alternatives.

#4

LEASING IS THE MOST USED SOLUTION,
including both finance and operating leasing.

#5

A MODERATE USAGE OF TELEMATICS,
driven by fleet cost reduction.

3

WHAT ARE THE MAIN CHARACTERISTICS OF THE FLEETS?

INSIGHT#1: A SMALL MARKET AS COMPARED TO EUROPE

INSIGHT 1: A SMALL MARKET AS COMPARED TO EUROPE

1. There is both a higher proportion of companies with passenger cars and companies with LCVs. However, in terms of size, Norwegian fleets are smaller than European average (43 vehicles on average vs. 107 in Europe)

2. With an average of 5.2 years, possession length is very similar to the rest of Europe. LCVs possession length even tends to be shorter (5.5 vs. 6.0 Europe) which may imply less future inertia than in the rest of Europe, notably regarding the transition towards alternative fuel technologies.

3. Norwegian companies are overall optimistic concerning the fleet market potential growth: 29% think the number of vehicles in their fleet will increase (vs. EU 28%).Yet a significant part anticipate a decrease (13% vs. EU 8%).
While big companies are the most optimistic (43% increase vs. 16% decrease), companies of less than 10 employees are the less confident (18% decrease).

4. This less important potential of growth may be linked with a Norwegian economic growth (GDP) in the low average of Europe. Indeed less companies think fleet growth will be motivated by economic dynamism of the company (64% vs. 74% Europe) while 25% of the companies anticipating a fleet decrease mention declining business (vs. 23% Europe). Taxes increase also motivate potential decrease of the fleet (21% vs. EU 18%), reflecting high involvement of the government regarding greener fleets.

FLEET PROFILE

AVERAGE SIZE OF FLEET

43	107
vehicles	vehicles

ANTICIPATED GROWTH OF FLEET (% will increase)

29%	28%

FLEET POSSESSION LENGTH

5.2	5.4
years	years

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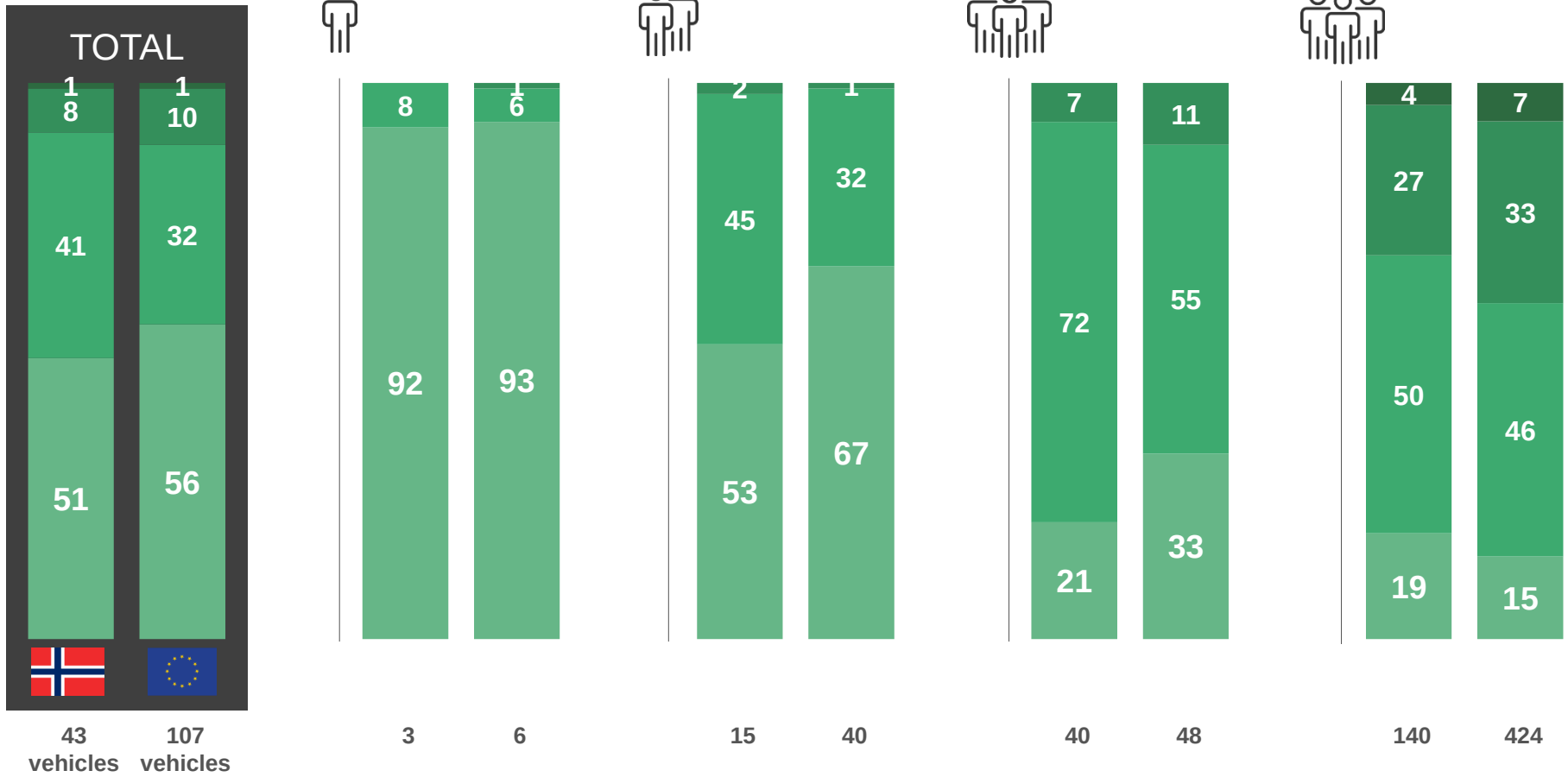
NUMBER OF VEHICLES IN FLEET

In %

Passenger cars + LCVs

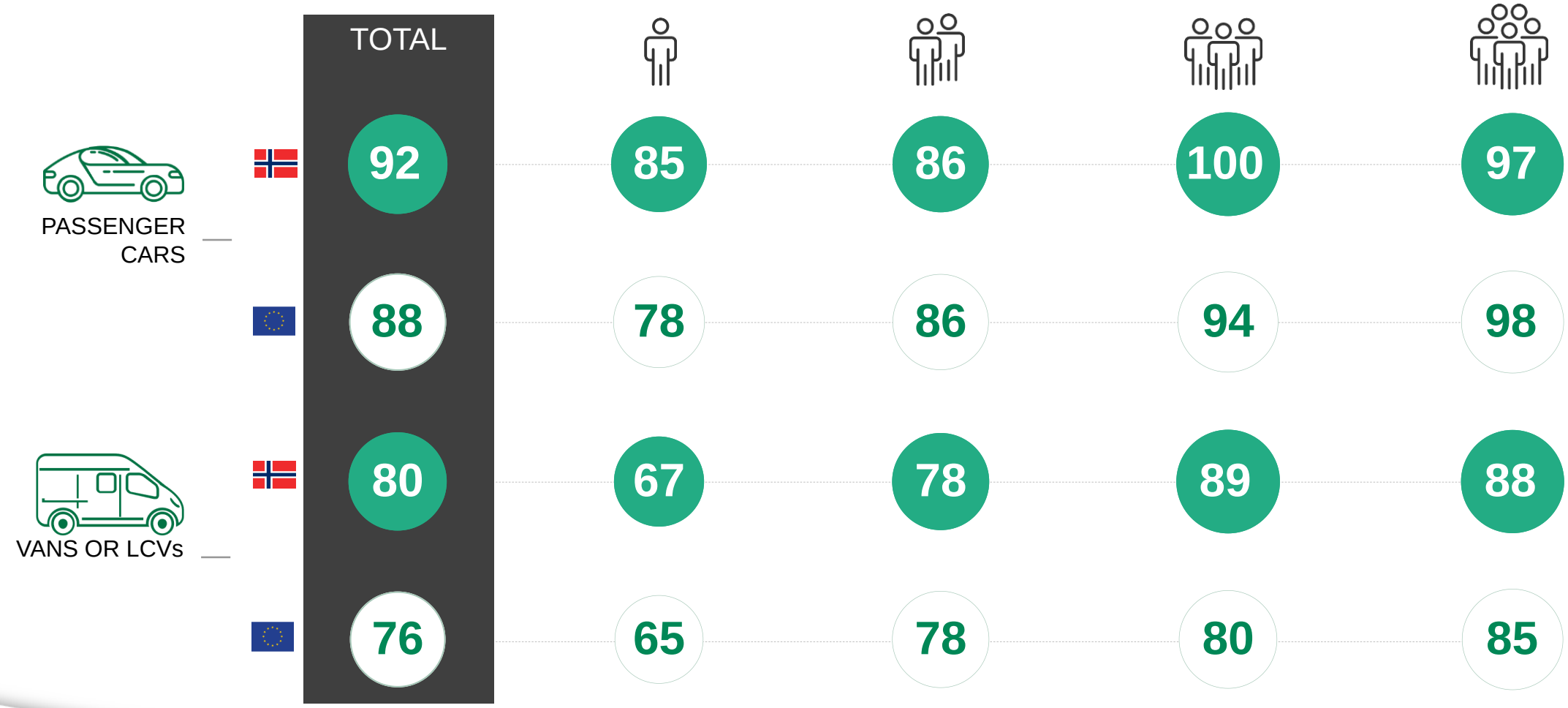


Can you please tell me the total number of vehicles of less than 3.5 tons in your fleet?
Basis: companies with corporate vehicles = 100%

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

(among companies with at least one vehicle in fleet)

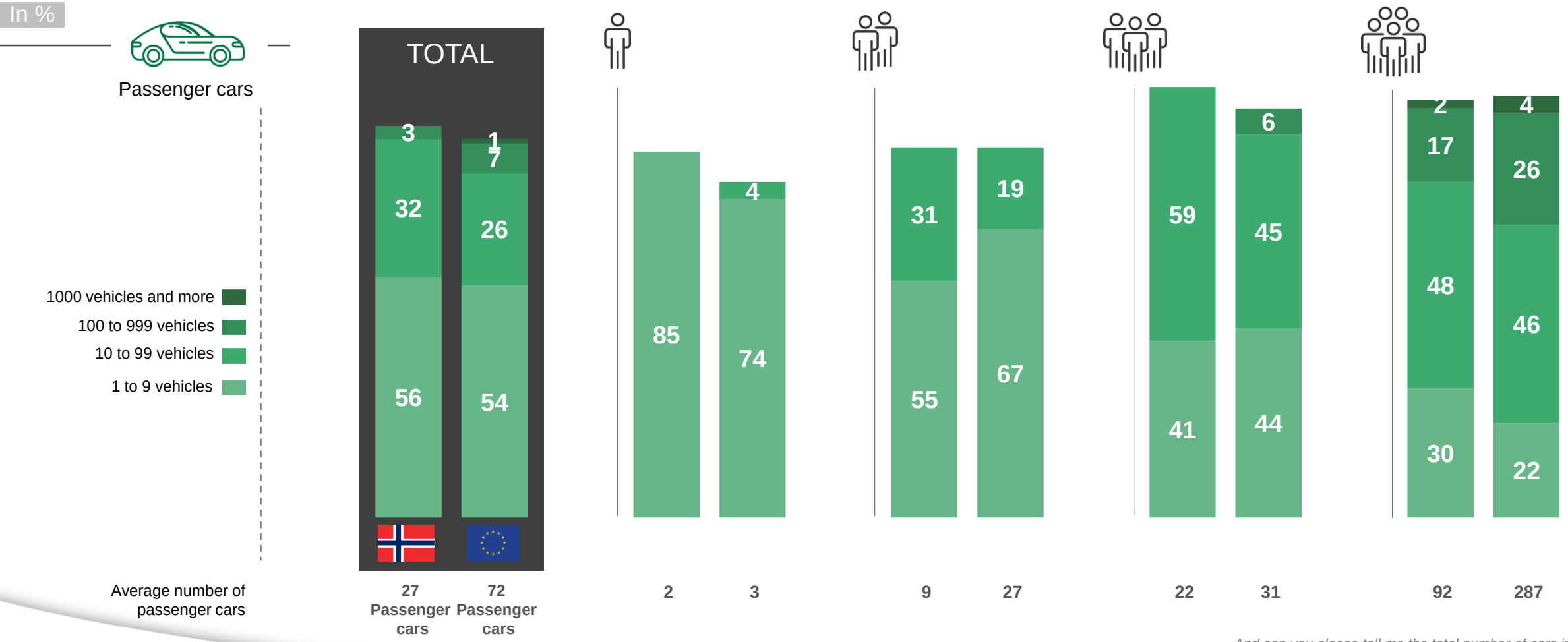
In %



Basis: companies with corporate vehicles = 100%

NUMBER OF PASSENGER CARS IN FLEET

In %

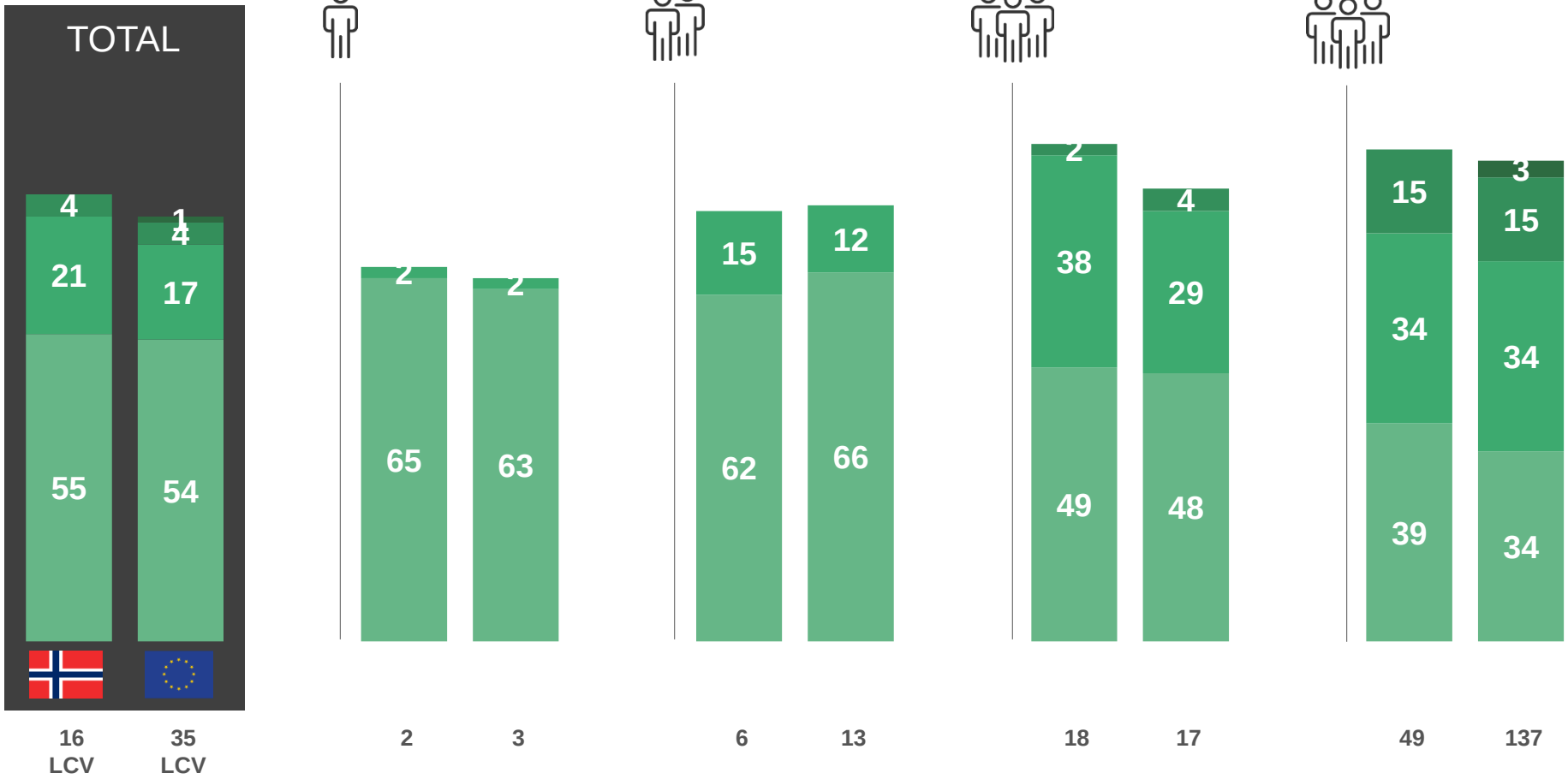


And can you please tell me the total number of cars in your fleet?
Basis: companies with corporate vehicles = 100%

NUMBER OF LCVS IN FLEET

In %

LCVs



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

VEHICLE POSSESSION LENGTH

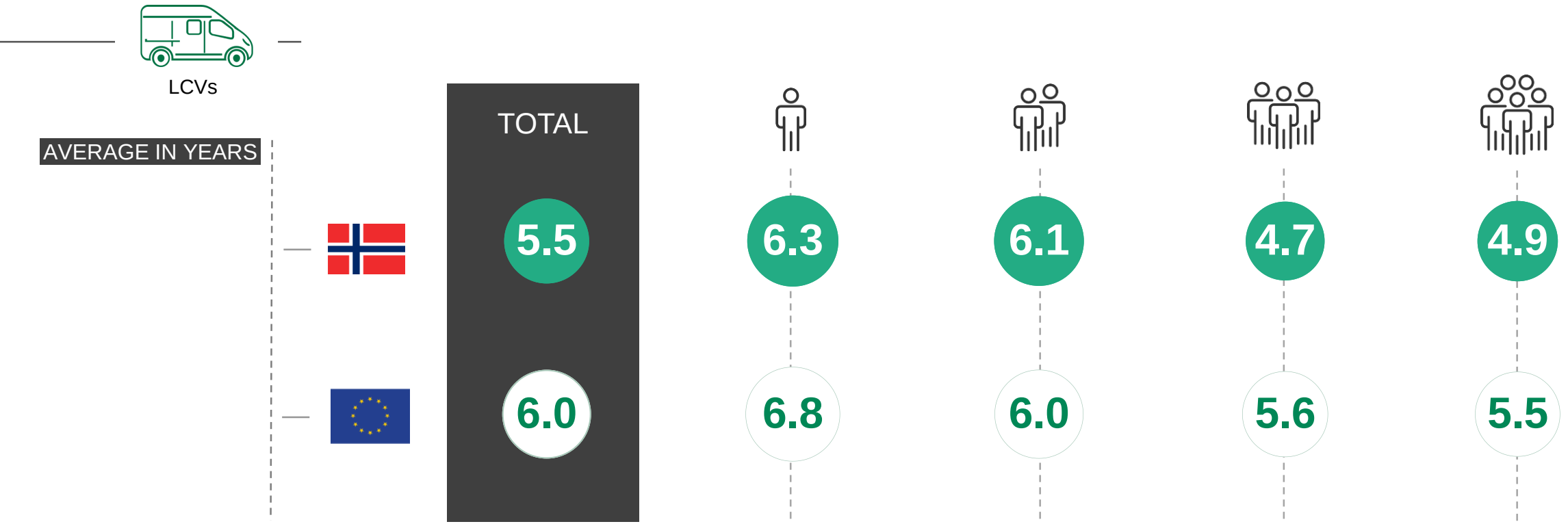
Passenger cars + LCVs

AVERAGE IN YEARS

	TOTAL				
	5.2	6.0	5.5	4.6	4.7
	5.4	6.2	5.5	5.0	4.9

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%

LCVS POSSESSION LENGTH

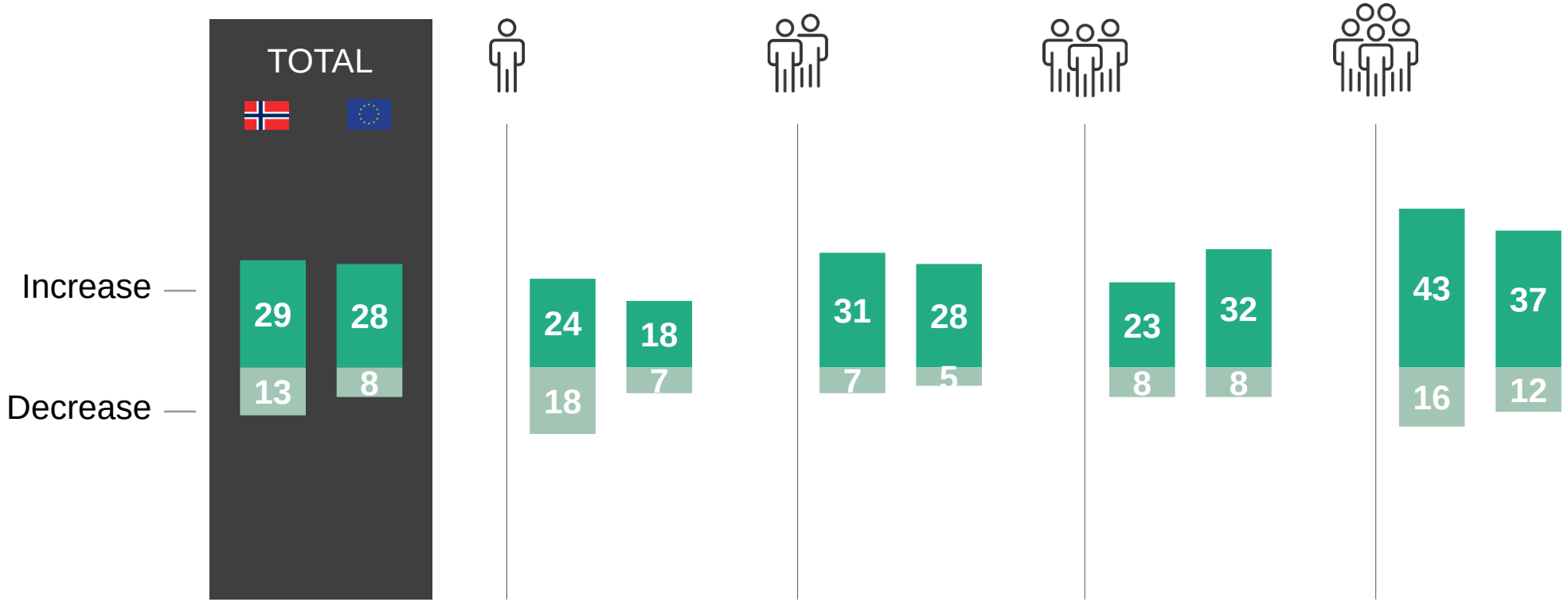


And how long do you keep your LCV, light commercial vehicles or vans (before being sold or giving back to the leasing company)?
Basis: companies with LCVS= 100 %

FLEET GROWTH POTENTIAL

In %

Passenger cars + LCVs



BALANCE in pts (INCREASE ⊖ DECREASE)

	TOTAL									
2020	+16	+20	+6	+11	+24	+23	+15	+24	+27	+25

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%

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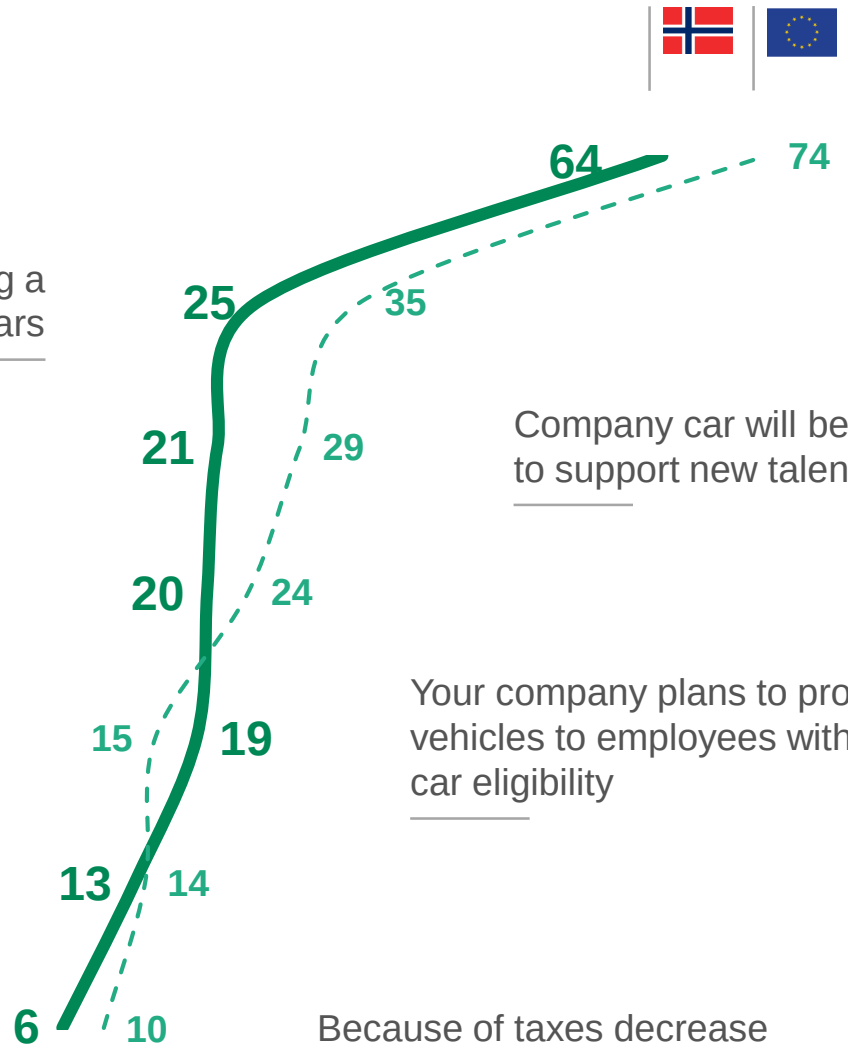
REASONS FOR FLEET FUTURE INCREASE

In %

Passenger cars + LCVs



Because your company is growing

Because your company is developing a new activity that requires company cars

Company car will be proposed in order to support new talents recruitment

Company car will be proposed in order to retain employees in your company

Your company plans to propose vehicles to employees with no company car eligibility

Your company plans to propose shared vehicles to employees

Because of taxes decrease

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

REASONS FOR FLEET FUTURE DECREASE

In %

Passenger cars + LCVs

Less employees will have access to company cars — 22 / 33

The number of employees is reducing — 22 / 32

Because of the introduction or development of alternative mobility solutions — 13 / 25

Your business is declining — 23 / 25

Because of CSR — 18 / 22

Shared vehicles will partly or totally replace the current company fleet — 18 / 20

Because of taxes increase — 18 / 21

Drivers are choosing cash allowance — 14 / 15

Because you plan to increase the home office working — 0 / 13

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

4

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

INSIGHT#2: THE LEADER MARKET IN EUROPE, IN THE ENERGY MIX TRANSITION.

INSIGHT 2: THE LEADER MARKET IN EUROPE, IN THE ENERGY MIX TRANSITION.

1. Norway is one of the most advanced country in Europe in the energy mix transition and is expected to strengthen its position as a leader in the next 3 years: 48% of Norwegian companies have already implemented at least one fuel alternative. By the next 3 years, there is a potential of 77% of companies having implanted alternative fuel technologies.

2. Their advance is strong, regardless of the company size, particularly on 100% Electric (implementation: 29% vs. 16% in Europe / Potential by 3 years: 60% vs. 40%): Conversely to other European countries, next 3 years potential of 100% electric is ahead of Hybrid. Its potential is also strong for LCVs fleets.
Plug-in and Hybrid also show strong usage and potential, ahead of Europe average: Plug-In is used by 25% of companies (vs. 17% Europe) and could reach 54% of user by 2023 (vs. 43%). Hybrid reach similar performances (24% of users vs. 19% Europe ; Potential of 52% of users by 2023 vs. 45% Europe).

3. In line with the rest of Europe, alternative fuel technologies are implemented in order to limit carbon emission (1st reason), and to reduce fuel expenses and improve company image. Besides, Norway manages to remove barriers that remain strong in other European countries: price of EV (15% vs. 57% Europe) and number of charging points (40% vs. 58%). Charging points remain at stakes even if it is a smaller barrier vs. the rest of Europe.

4. Considering Norway's head start regarding alternative fuel energies, the WLTP norm will have logically more limited impact than in the rest of Europe (no impact: 35% vs. 31% Europe / change the energy mix: 20% vs. 31%). However, still considering Norway's maturity, Diesel is still at stake, with 50% of expected share in fleets by the next 3 years (vs. 49% in Europe. In Norway, ecologic transition seems to limit more Petrol (20% of expected share in fleet by the next 3 years vs. 28% Europe) than Diesel, especially among smaller companies.

ENERGY MIX

AT LEAST ONE ALTERNATIVE IMPLEMENTED OR CONSIDERED

77% 62%

EXPECTED PART OF PETROL 3 YEARS

20% 28%

AT LEAST ONE ALTERNATIVE IMPLEMENTED

48% 34%

EXPECTED PART OF DIESEL 3 YEARS

50% 49%

EXPECTED PART OF PETROL AND DIESEL (NEXT 3 YEARS)

In %

Passenger cars + LCVs

	TOTAL				
DIESEL	50	54	55	51	38
	49	51	50	50	43
PETROL	20	16	17	24	26
	28	28	28	26	29

In your opinion, what percentage will diesel vehicles account for in your fleet in 3 years?
In your opinion, what percentage will petrol vehicles account for in your fleet in 3 years?
Basis: companies with corporate vehicles = 100%

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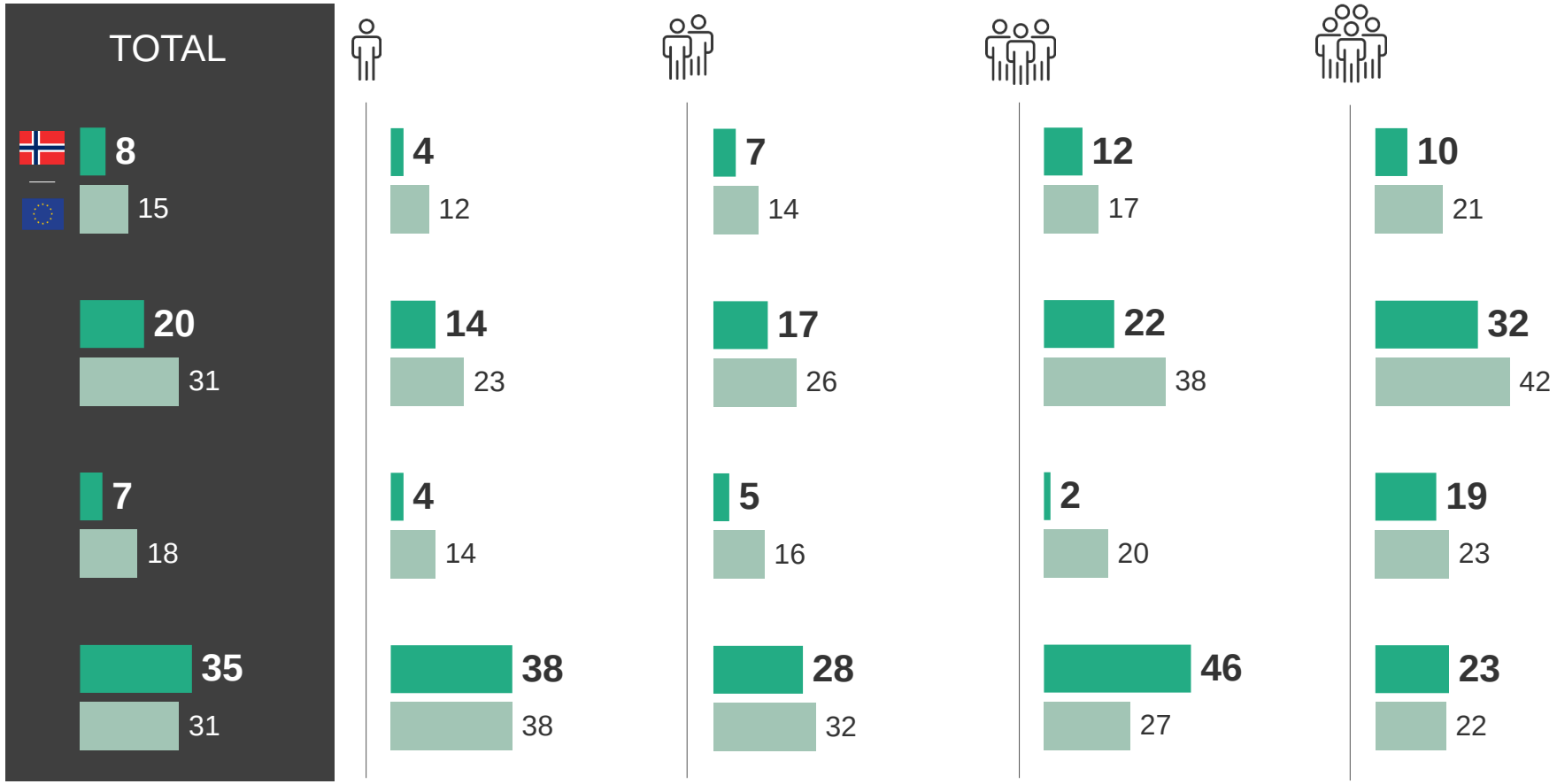
FOCUS WLTP

Actions to be taken to adapt WLTP

In %

Passenger cars + LCVs



Today, fuel consumption and CO2 emissions are determined with a new, more realistic test cycle: the WLTP-test
What actions will be taken to adapt to the WLTP-test?.
Basis: companies with corporate vehicles = 100%

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CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

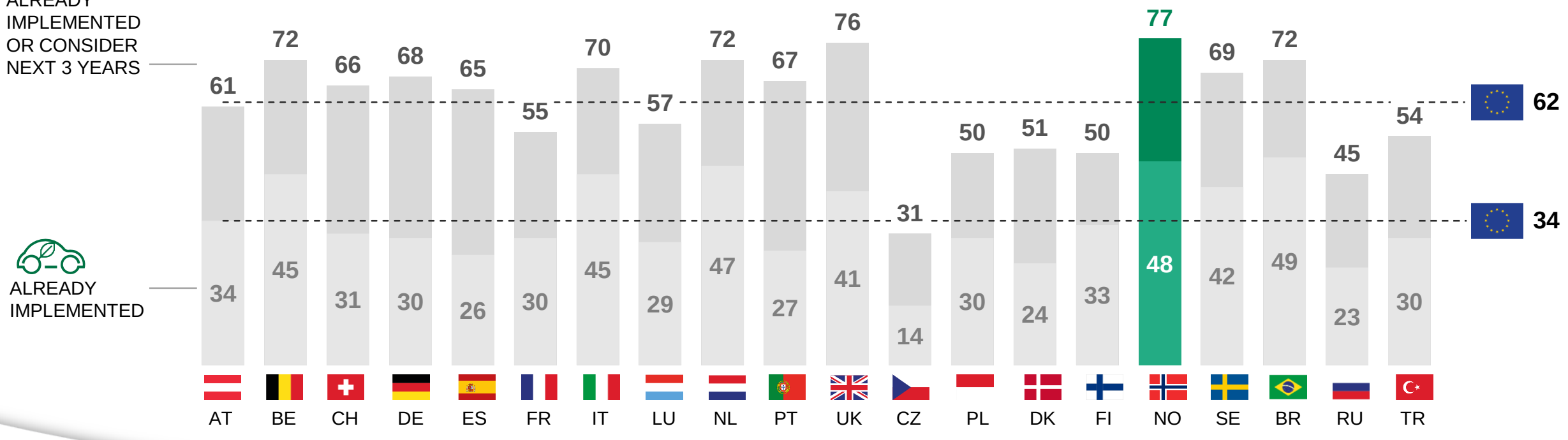
At least one technology

In %

Passenger cars + LCVs

HOW TO READ THE RESULTS ?

In Norway, 77% of the companies have already implemented or consider to implement at least one alternative technology in the next 3 years. 48% have already implemented at least one.



Amongst the following alternative fuel technologies, which ones do you use or are you considering using…?
Response scale: Already implemented, considered in the next 3 years, considered but later, not interested
Basis: companies with corporate vehicles = 100%

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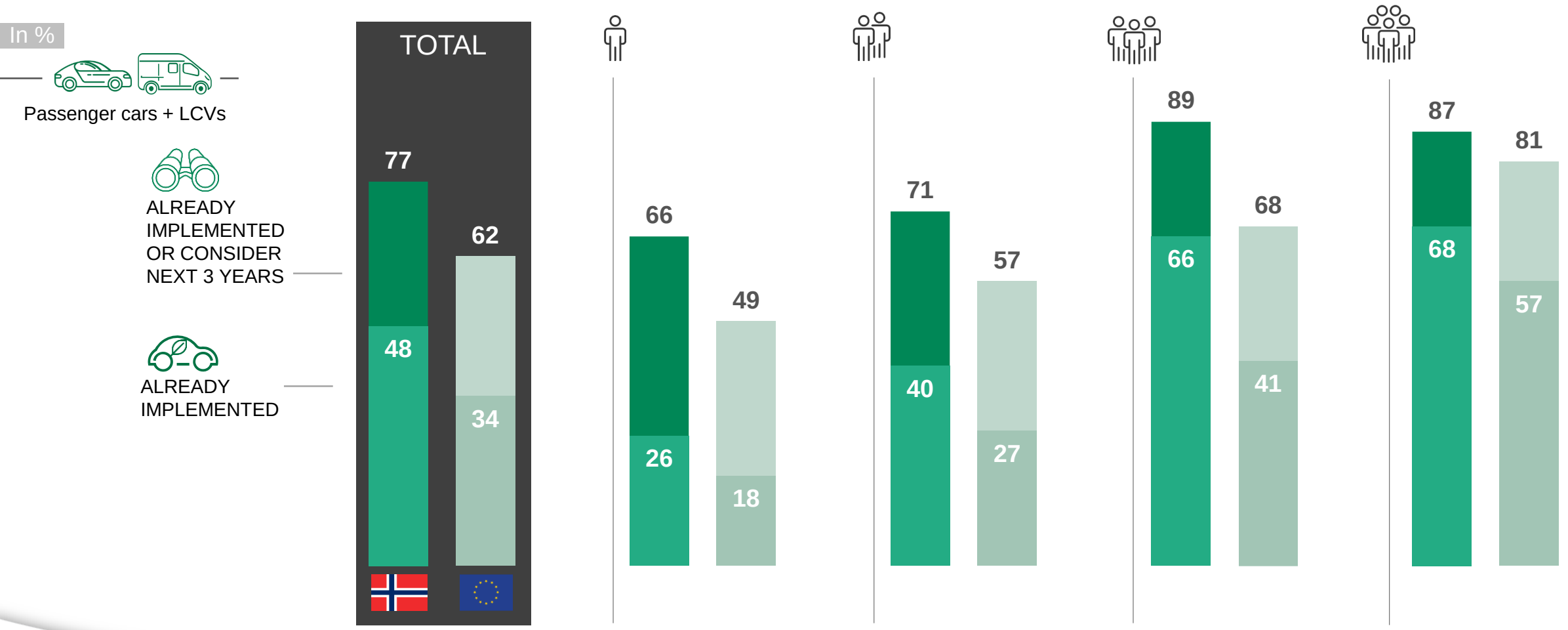
CONSIDERATION FOR ALTERNATIVE FUEL TECHNOLOGIES

At least one technology



Amongst the following alternative fuel technologies, which ones do you use or are you considering using…?
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Basis: companies with corporate vehicles = 100%

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

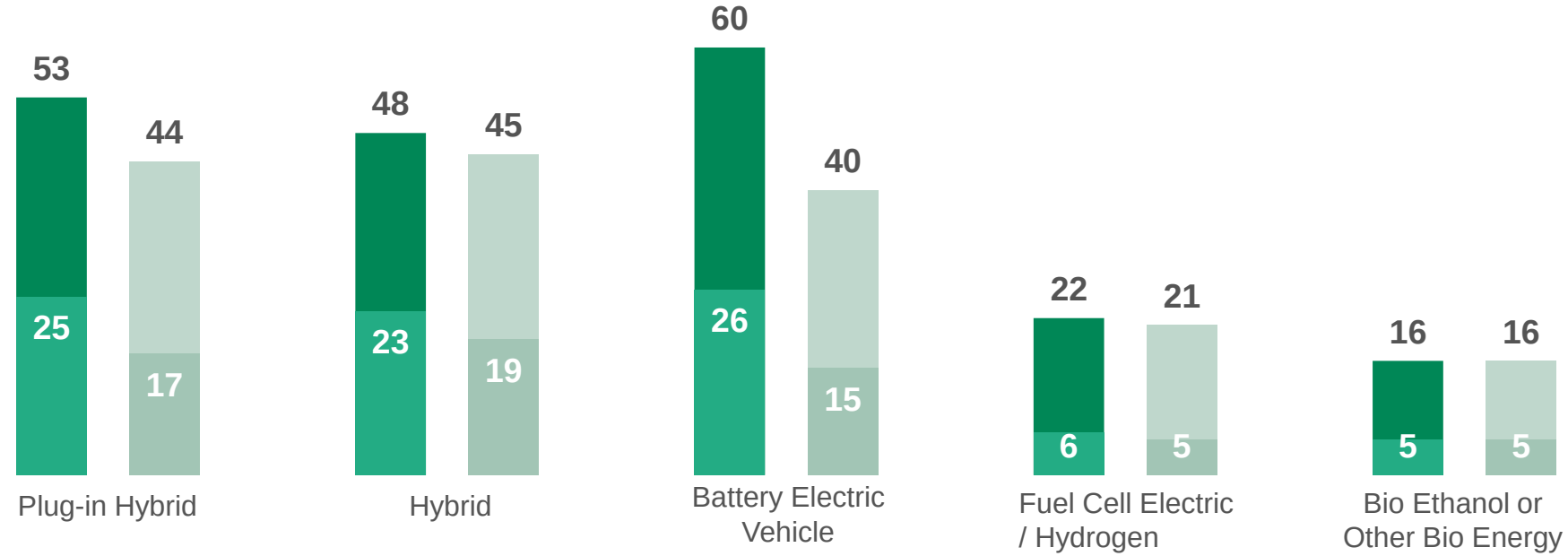
Passenger car fleet

In %

Passenger cars

ALREADY IMPLEMENTED OR CONSIDER NEXT 3 YEARS

ALREADY IMPLEMENTED



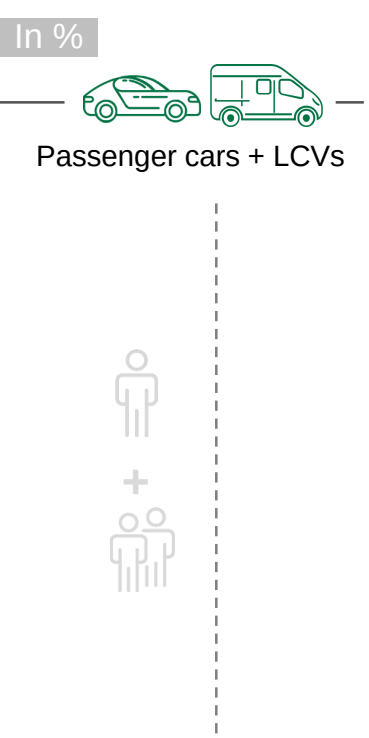
Amongst the following alternative fuel technologies, which ones do you use or are you considering using…?
Response scale: Already implemented, considered in the next 3 years, considered but later, not interested
Basis: companies with corporate passenger cars

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Focus on 1 to 99

In %

Passenger cars + LCVs



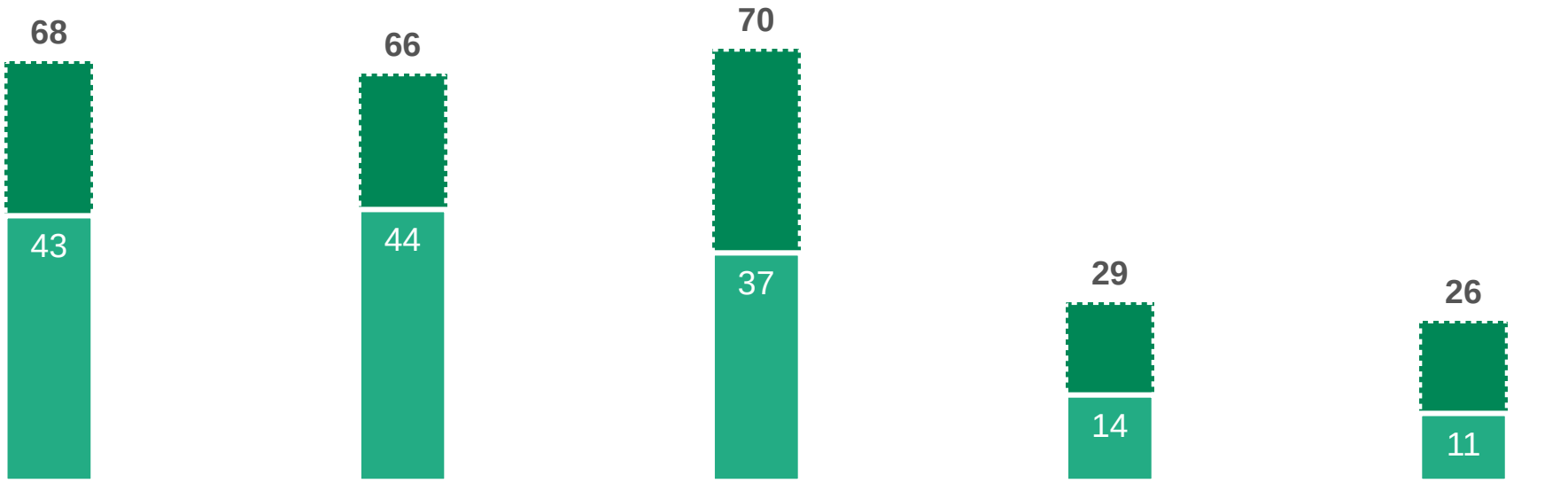
Amongst the following alternative fuel technologies, which ones do you use or are you considering using…?
Response scale: Already implemented, considered in the next 3 years, considered but later, not interested
Basis: companies with corporate vehicles

ALTERNATIVE FUEL TECHNOLOGIES USAGE – DETAIL PER TECHNOLOGY

Focus on 100 and more

In %

Passenger cars + LCVs



Amongst the following alternative fuel technologies, which ones do you use or are you considering using…?
Response scale: Already implemented, considered in the next 3 years, considered but later, not interested
Basis: companies with corporate vehicles

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

4

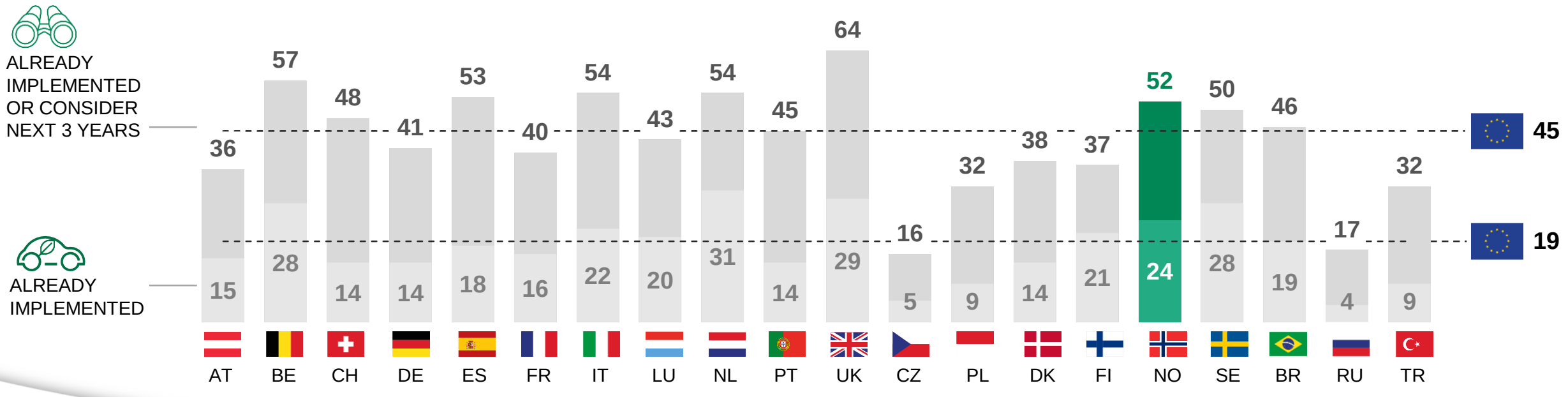
ENERGY MIX

FOCUS PER ALTERNATIVE TECHNOLOGY

HYBRID IMPLEMENTATION

In %

Passenger cars + LCVs



Amongst the following alternative fuel technologies, which ones do you use or are you considering using…?
Response scale: Already implemented, considered in the next 3 years, considered but later, not interested
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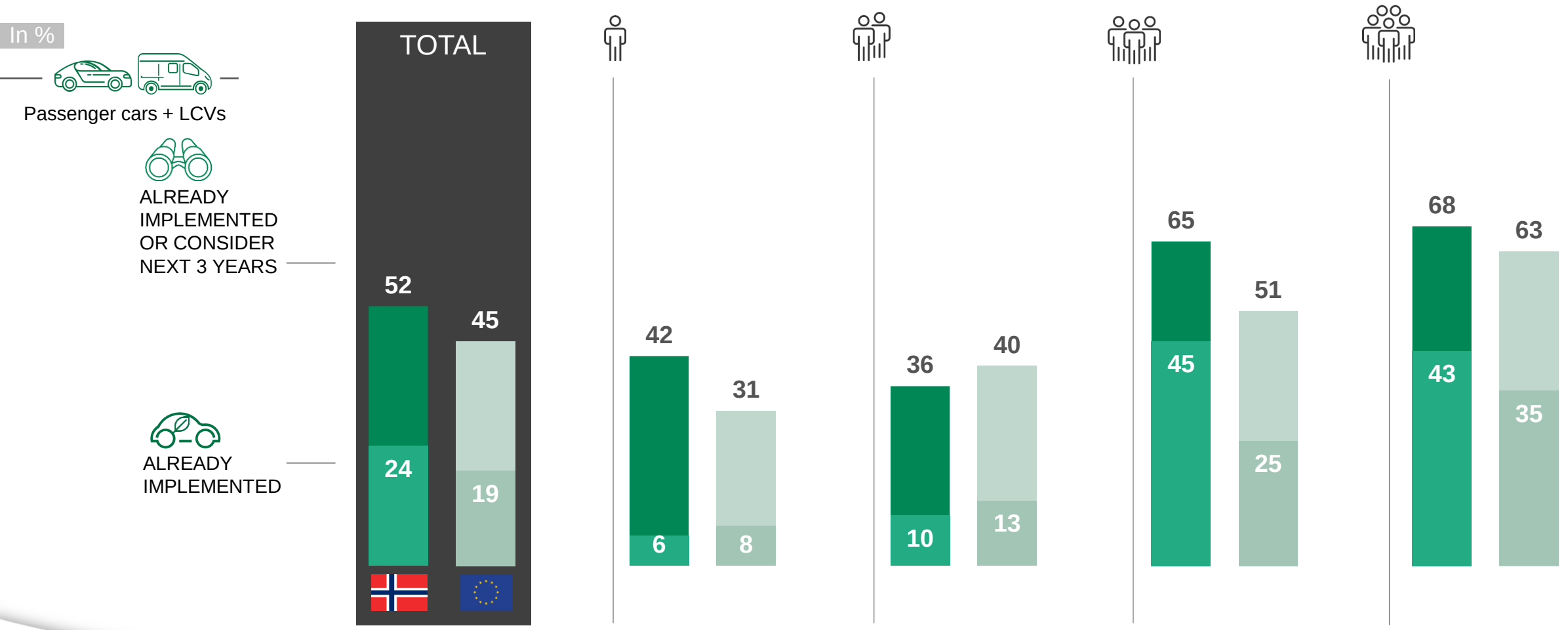
HYBRID IMPLEMENTATION

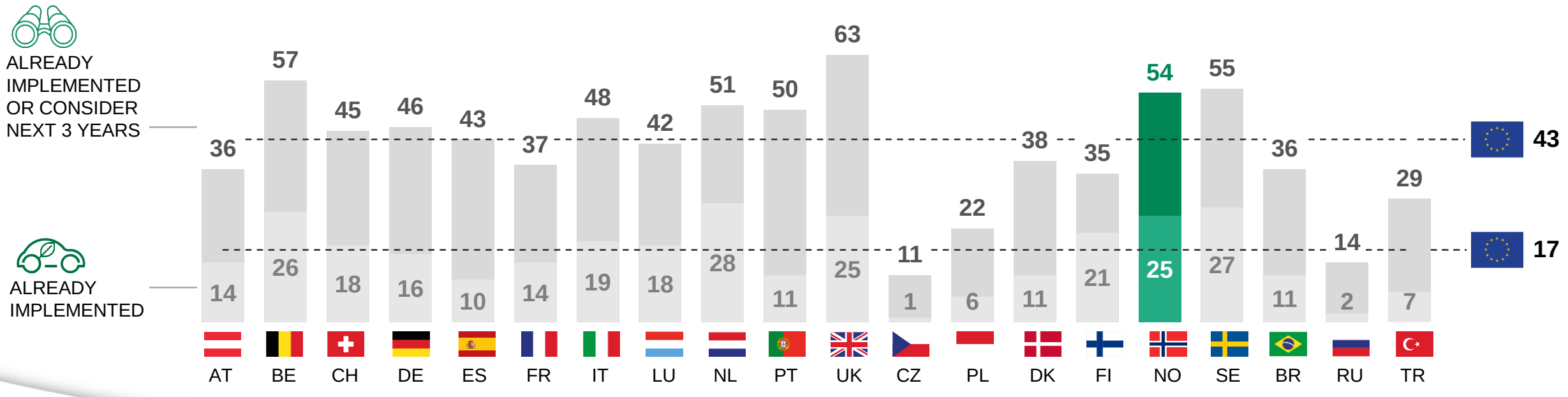


Amongst the following alternative fuel technologies, which ones do you use or are you considering using…?
Response scale: Already implemented, considered in the next 3 years, considered but later, not interested
Basis: companies with corporate vehicles = 100%

PLUG-IN HYBRID IMPLEMENTATION

In %

Passenger cars + LCVs



Amongst the following alternative fuel technologies, which ones do you use or are you considering using…?
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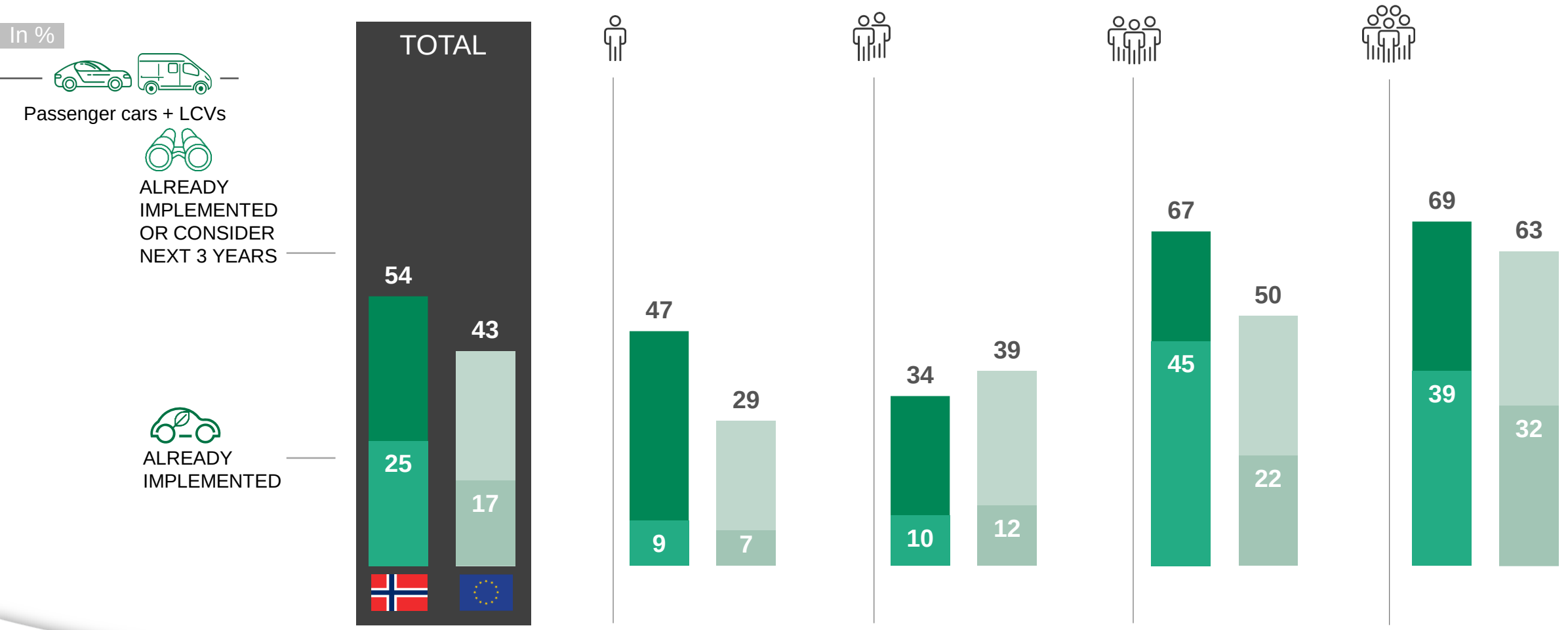
Basis: companies with corporate vehicles = 100%

PLUG-IN HYBRID IMPLEMENTATION



Amongst the following alternative fuel technologies, which ones do you use or are you considering using…?
Response scale: Already implemented, considered in the next 3 years, considered but later, not interested
Basis: companies with corporate vehicles = 100%

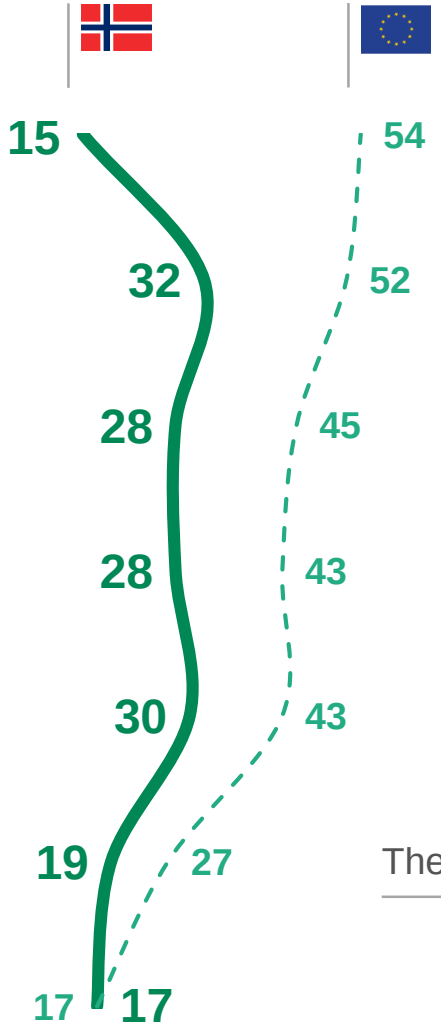
CONSTRAINTS OF PLUG IN HYBRID IMPLEMENTATION

In %

Passenger cars + LCVs

do not consider implementing plug-in Hybrid vehicles

23



What are the constraints of using plug-in hybrid vehicles?
Basis: companies not considering plug-in hybrid vehicles

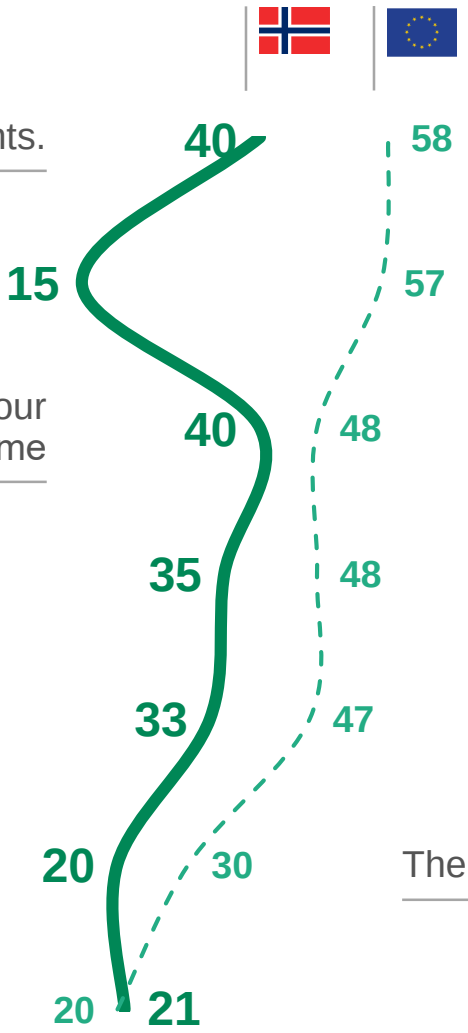
CONSTRAINTS OF 100% BATTERY ELECTRIC IMPLEMENTATION

In %

Passenger cars + LCVs

do not consider implementing battery electric vehicles

20



What are the constraints of using 100% Battery Electric vehicles?
Basis: companies not considering 100% battery electric vehicles

5

WHAT ARE THE PERSPECTIVES IN TERMS OF ALTERNATIVE MOBILITY SOLUTIONS ?

INSIGHT#3: BIG COMPANIES LEAD THE WAY, IN THE ADOPTION OF MOBILITY ALTERNATIVES.

INSIGHT 3: BIG COMPANIES LEAD THE WAY, IN THE ADOPTION OF MOBILITY ALTERNATIVES.

1

28% of companies allow mobility solutions in their car policy (vs. 27% Europe). Main alternatives used so far, regardless of Norwegian company size, are ride sharing (27% vs. EU 28%) and public transport (27% vs. EU 31%).

2

Mobility alternatives are expected to increase, especially within big companies which are leading the transition:
- Ride sharing has the highest potential of future usage (next 3 years), whatever the company size, reaching 48% (vs. EU 42%).
- Public transport would be used by 42% of companies by the next 3 years.
- Corporate car sharing records strong growth potential, reaching 35% (vs. EU 32%) while it is only used by 10% of companies so far.
  This alternative is particularly favored by very small companies (31%).
- Other alternatives such as, private lease or salary sacrifice and app have limited use, in line with the rest of Europe. Yet, they could be adopted by 3 companies out of 10 by the next 3 years.
- Mid term rental also shows good potential (30%) even if so far, it is less used than in the rest of Europe

Some of the alternatives could ultimately lead to reducing fleet size: car sharing, mid term rental, ride sharing and private lease or salary sacrifice.

3

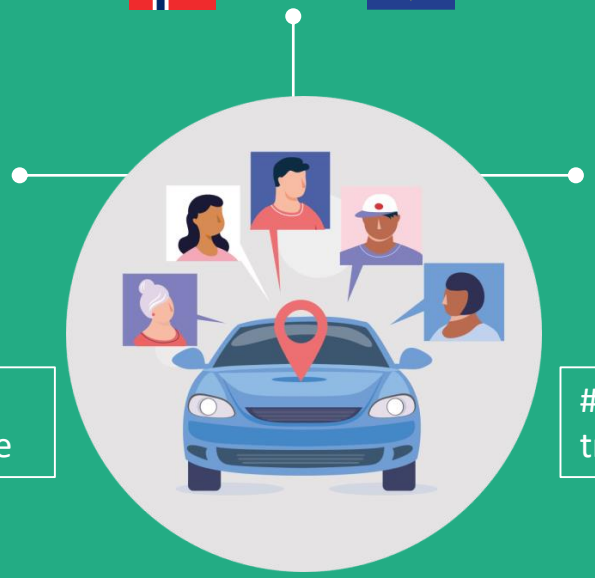
Differences are noted according to company size. Big companies are willing to develop alternatives in all its forms and in higher proportions than European average, while smaller companies tend to prioritize some alternatives. Less than 100 employees companies concentrate their current usage on ride sharing and public transport, but they are open to future usage of car sharing, mid term rental and private lease or salary sacrifice.

MOBILITY ALTERNATIVES

In %

ALLOWS MOBILITY ALTERNATIVE IN THE CAR POLICY

28	27



TOP 3 USED ALTERNATIVES

#1: Ride sharing between employees

27	28

#2: Public transport

27	31

#3: Prviate lease or salary sacrifice

12	13

TOP 3 POTENTIAL NEXT 3 YEARS

#1: Ride sharing between employees

48	42

#2: Public transport

42	42

#3: Corporate car sharing

35	32

MOBILITY ALTERNATIVES LIST AND DEFINITIONS

CORPORATE CAR SHARING:
the company makes available upon reservation vehicles for its employees via an external solution

RIDE SHARING BETWEEN EMPLOYEES: several employees in the same car for a journey to the same destination

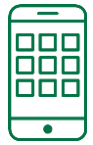
BIKE SHARING

OTHER 2 WHEELS SOLUTIONS (motorbike, motorized scooters,…) or micro-mobility (kick scooter)

PUBLIC TRANSPORT

MOBILITY BUDGET within a predefined budget usually granted by the employer allowing employees to choose any mobility mode that is available on the market

MOBILITY CARD PROVIDED BY THE EMPLOYER: employees can use it to book, pay, use any mobility mode available on their country (Xximo card…)



AN APP TO BOOK MOBILITY SOLUTIONS (travel planning, payments for your transport...)

PRIVATE LEASE OR SALARY SACRIFICE (by private lease we mean the fact that an employee rents or lease a car on his own behalf. By salary sacrifice, we mean the fact that an employee rents or lease a car via his employer)

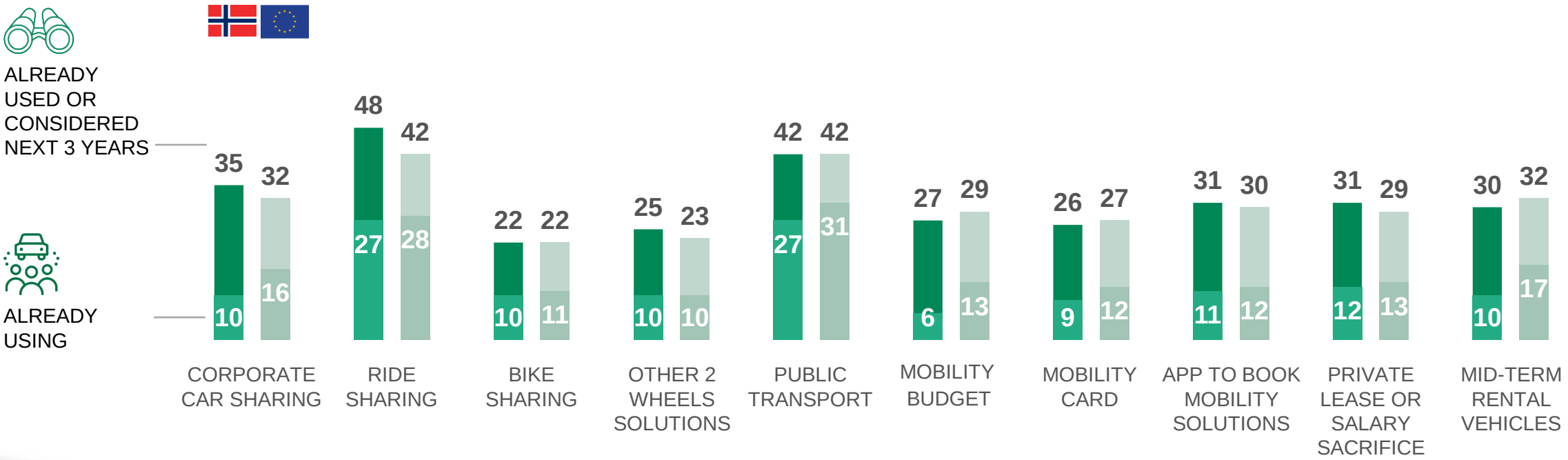
PROVIDE MID-TERM RENTAL VEHICLES (a rental for between 1 to 24 months) to provide transport needs for an employee

OVERVIEW OF ALTERNATIVE MOBILITY SOLUTIONS IMPLEMENTATION

In %

28% Of companies allow mobility solutions in their car policy

53% have already implemented at least one the solutions below:



Do you allow mobility solutions in your car policy?
What have you already implemented and what 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%

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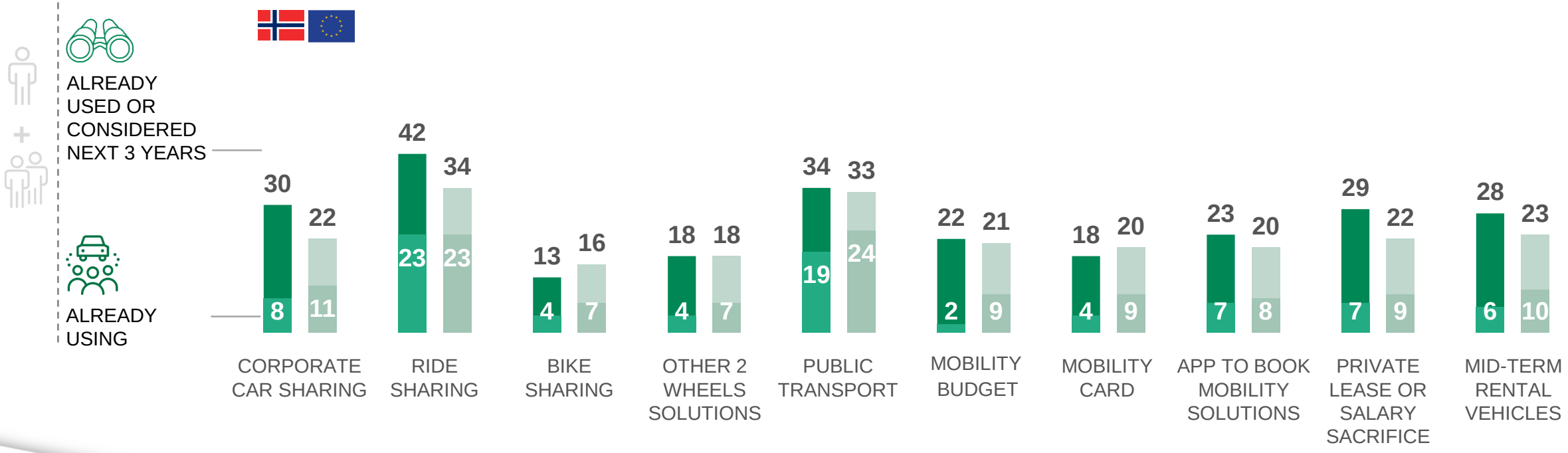
OVERVIEW OF ALTERNATIVE MOBILITY SOLUTIONS IMPLEMENTATION

Focus on 1 to 99

25% Of companies allow mobility solutions in their car policy

40% have already implemented at least one the solutions below:

In %



Do you allow mobility solutions in your car policy?
What have you already implemented and what 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%

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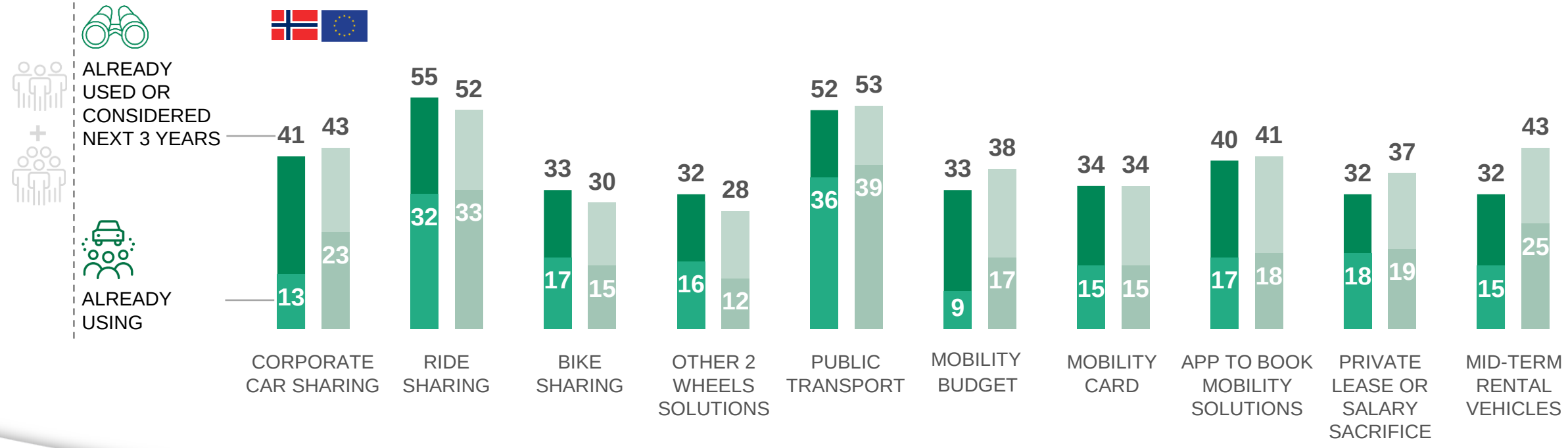
OVERVIEW OF ALTERNATIVE MOBILITY SOLUTIONS IMPLEMENTATION

Focus on 100 and more

33% Of companies allow mobility solutions in their car policy

68% have already implemented at least one the solutions below:

In %



Do you allow mobility solutions in your car policy?
What have you already implemented and what 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%

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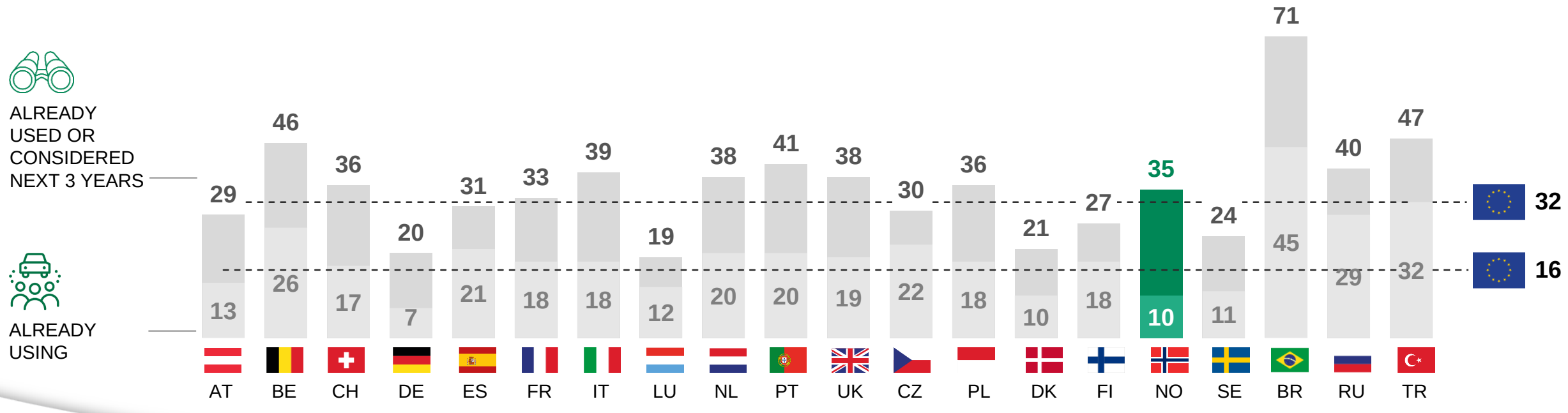
CORPORATE CAR SHARING IMPLEMENTATION

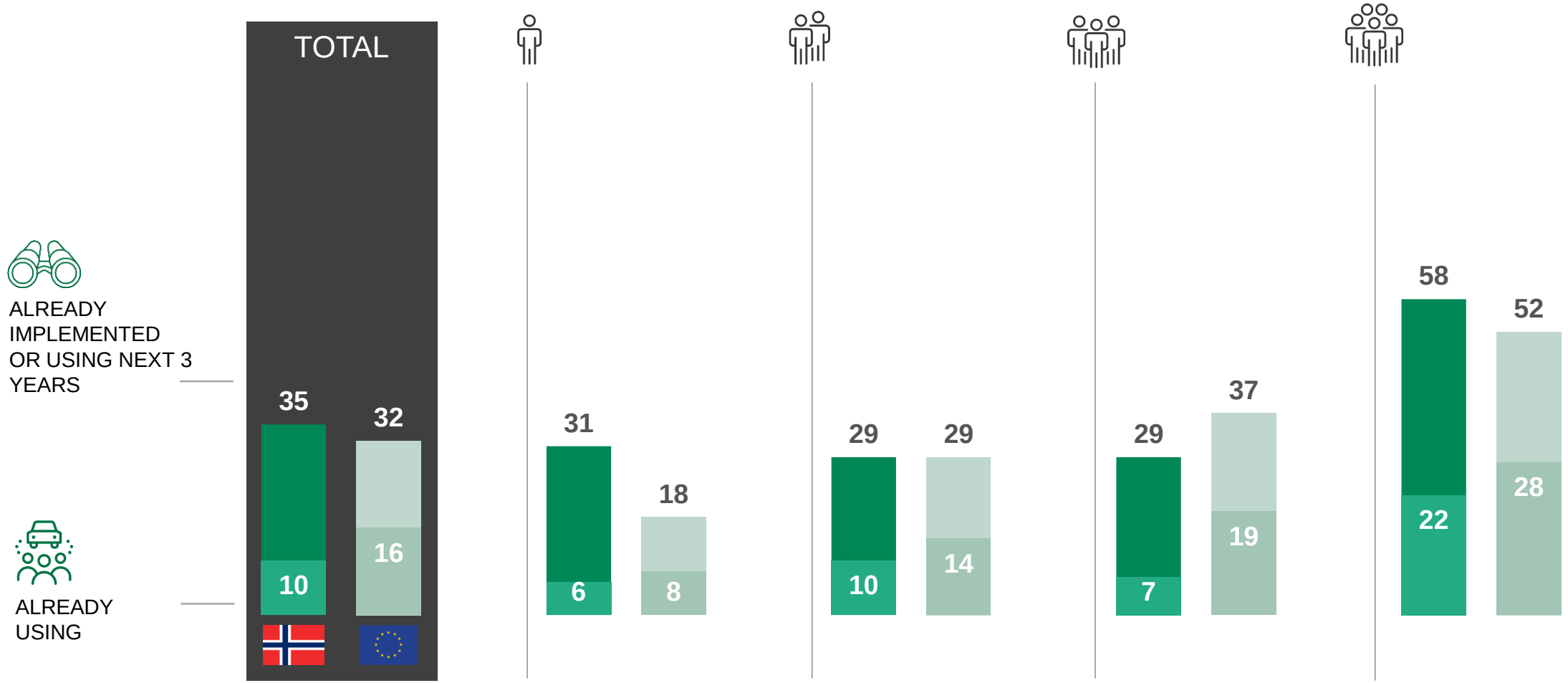
In %



What have you already implemented and what 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%

CORPORATE CAR SHARING IMPLEMENTATION

In %

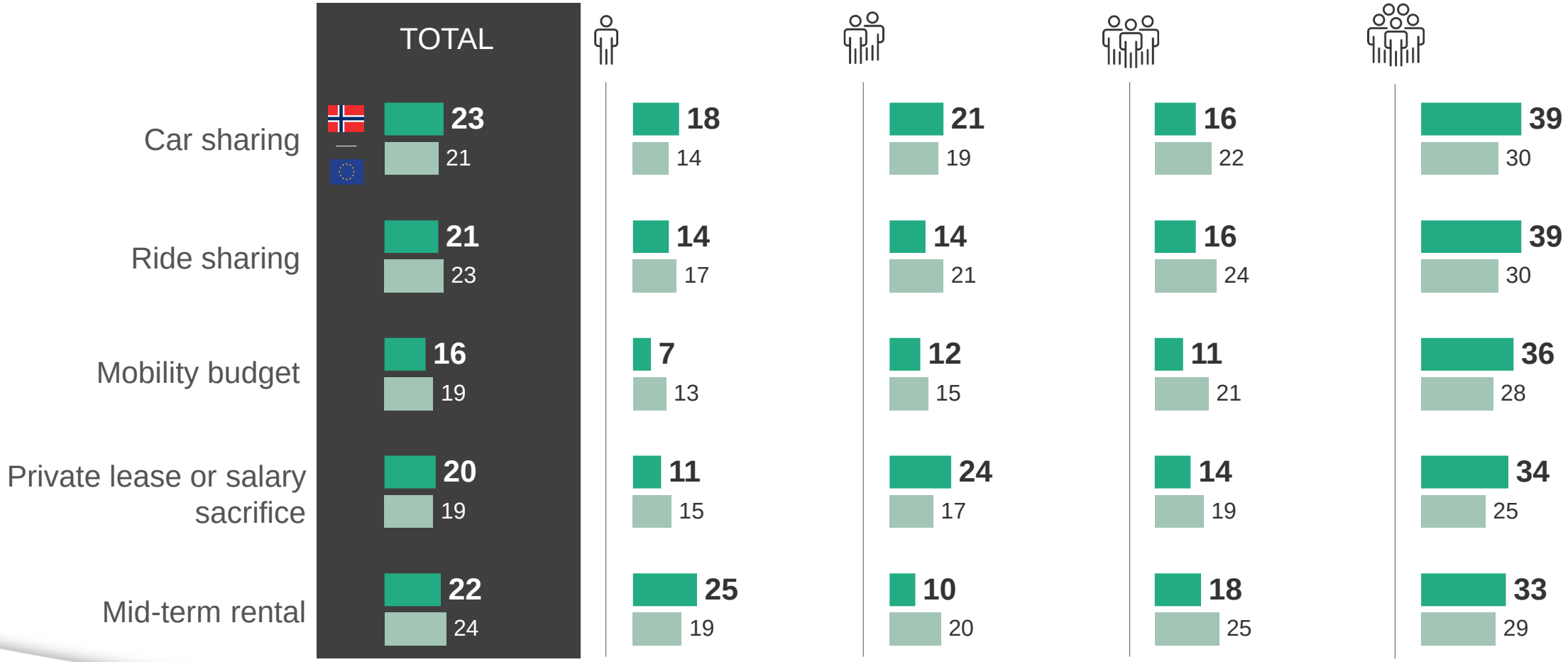


What have you already implemented and what will you implement in the next 3 years?
Response scale: Already using, considered in the next 3 years, not interested
Basis: companies with corporate vehicles = 100%

LIKELYHOOD TO GIVE UP PART / ALL FLEET FOR MOBILITY ALTERNATIVES

TOTAL Certainly or probably

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 the mentioned mobility solution

6

HOW COMPANIES ARE FINANCING THEIR FLEET?

INSIGHT#4: LEASING IS THE MOST USED SOLUTION, INCLUDING BOTH FINANCE AND OPERATING LEASING.

INSIGHT 4: LEASING IS THE MOST USED SOLUTION, INCLUDING BOTH FINANCE AND OPERATING LEASING.

1

54% of Norwegian companies are using leasing as their main financing method (including 34% of finance leasing and 20% of operating leasing) ; 37% of them are using self purchase.

2

Following European trend, the bigger the company size is, the less self purchase it uses, to the benefit of leasing. Some Norwegian specificities yet exist:
Norwegian companies are more numerous to use finance leasing than operating leasing (34% vs. 20%), which is the reverse pattern of other European countries (24% vs. 29%). This stronger usage of finance leasing is expected to remain in the near future. On the other side, the intention to develop operating leasing is lower than European average (32% vs. 37%), although, big companies show a stronger interest (54% vs. 50%).

FINANCING

In %

SELF PURCHASE

37	39

OPERATING LEASING

20	29

CAR CREDIT

10	9

FINANCE LEASING

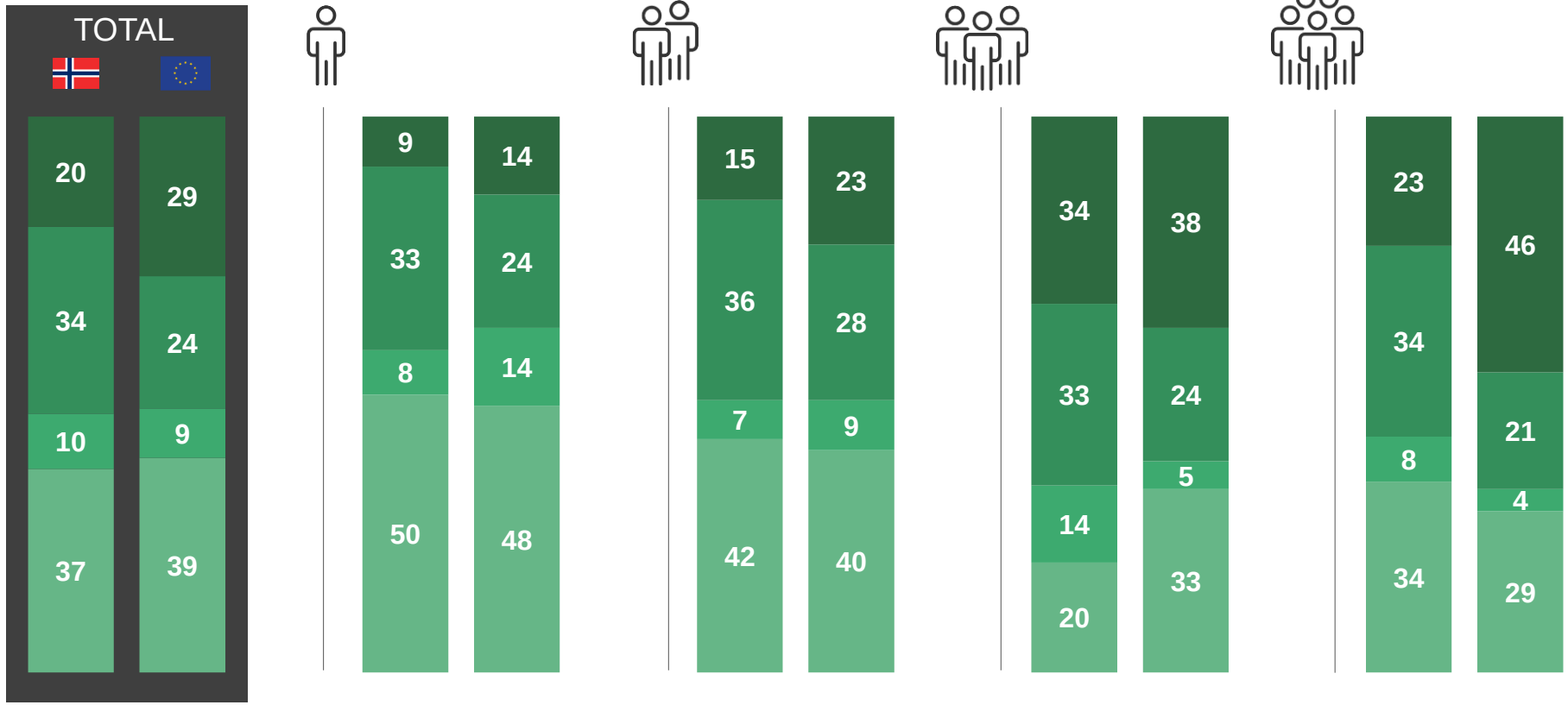
34	24

MAIN FINANCING METHOD

Proportion of companies using the following solutions as their main financing method for their fleet vehicles

In %

Passenger cars + LCVs



Self purchase*
Car credit
Finance leasing
Operating leasing

*Self-purchase = outright purchase + credit (other than car credit)

Data have consolidated: 3 years average

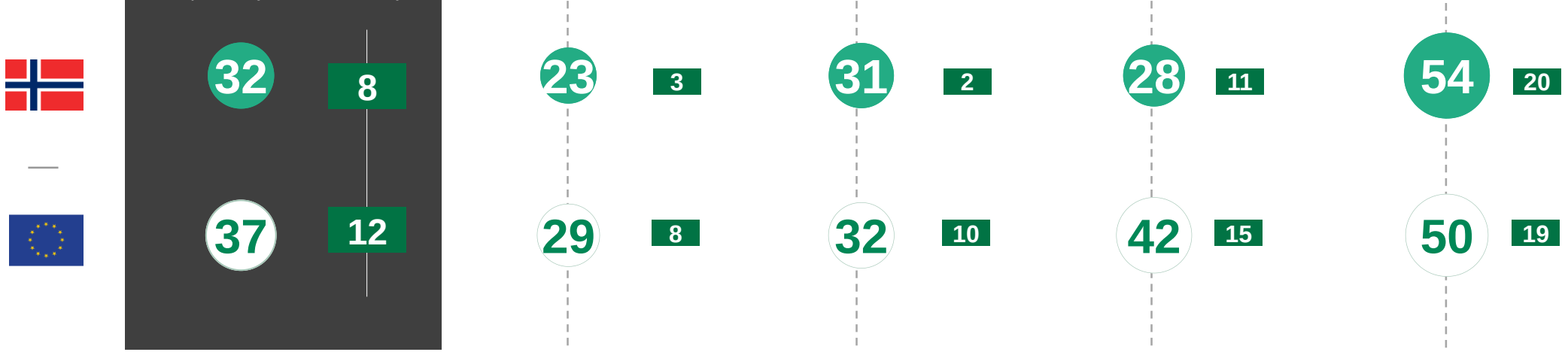
What is the main financing method used to finance your company vehicles today?
Basis: companies with corporate vehicles = 100%

INTENTION TO DEVELOP OPERATING LEASING

Proportion of companies having the intention to develop operational leasing

In %

Passenger cars + LCVs



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%

7

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

INSIGHT#5: A MODERATE USAGE OF TELEMATICS, DRIVEN BY FLEET COST REDUCTION.

INSIGHT 5: A MODERATE USAGE OF TELEMATICS, DRIVEN BY FLEET COST REDUCTION.

1

The usage of telematics in Norway is in the low average of Europe: 26% of Norwegian companies are currently using telematics (Europe: 33%). However, there are some disparities depending on company size: while medium size companies use them the less (13% vs. EU 39%), big companies show on the contrary a particular interest (55% vs. EU 50%).

2

Norwegian companies tend to use telematics for different reasons than other European countries:

- Mains reasons of usage are utilitarian: to reduce fleet costs, for 43% of them (vs. EU 32%) and avoid not allowed usage, for 38% of them (vs. EU 31%), regardless of the company size and the vehicle type.
- Car sharing optimization is also of particular interest vs. the rest of Europe, for 29% of them (vs. EU 20%), which is in line with mobility alternatives development.
- Some reasons are also specific to the company size: 43% of bigger companies are also particular interested in reducing their environmental impact (vs. Norwegian smaller companies 18% ; EU 25%) ; 38% of bigger companies pay a particular intention in improving drivers behaviours (vs. Norwegian smaller companies 12% ; EU 26%).

3

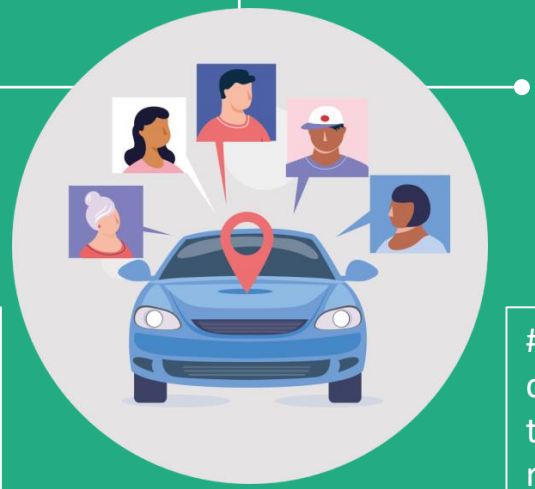
Benefit cars could represent the vehicle type with the most important potential growth in terms of telematics usage: overall barriers are lower than European average, except in managing the data under GDPR, which is a concern for 39% of Norwegian companies (vs. EU 30%) and having the approval of Trade Unions, for 26% of them (vs. EU 22%).
The growth potential is limited on other vehicles types, as key barriers would need to be lifted: Norwegian companies are not convinced that the data provided will be useful, especially on tool cars (45% vs. EU 38%), and are less convinced by the ROI.
On LCVs, while main barriers are in line with European average, main reasons are overall lower, notably regarding drivers safety, which can also explain the current particularly low usage of telematics of 18% on this vehicle type (vs. EU 28%).

TELEMATICS

In %

USE TELEMATICS

26	33



TOP 3 REASONS

	43	32
2	1	3
38		31

#1: To reduce fleet costs

#2: To avoid not allowed usage

	31	41
	1	
		3

#3: To locate vehicles or improve vehicle security

TOP 3 BARRIERS

	44	42
2	1	3
42		48

#1: You are not convinced that the data provided will be useful for your business operation

#2: You are not convinced that there will be a return on investment

	37	32
	1	
		3

#3: You have some concerns on managing the data under GDPR

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PROPORTION OF COMPANIES USING TELEMATICS

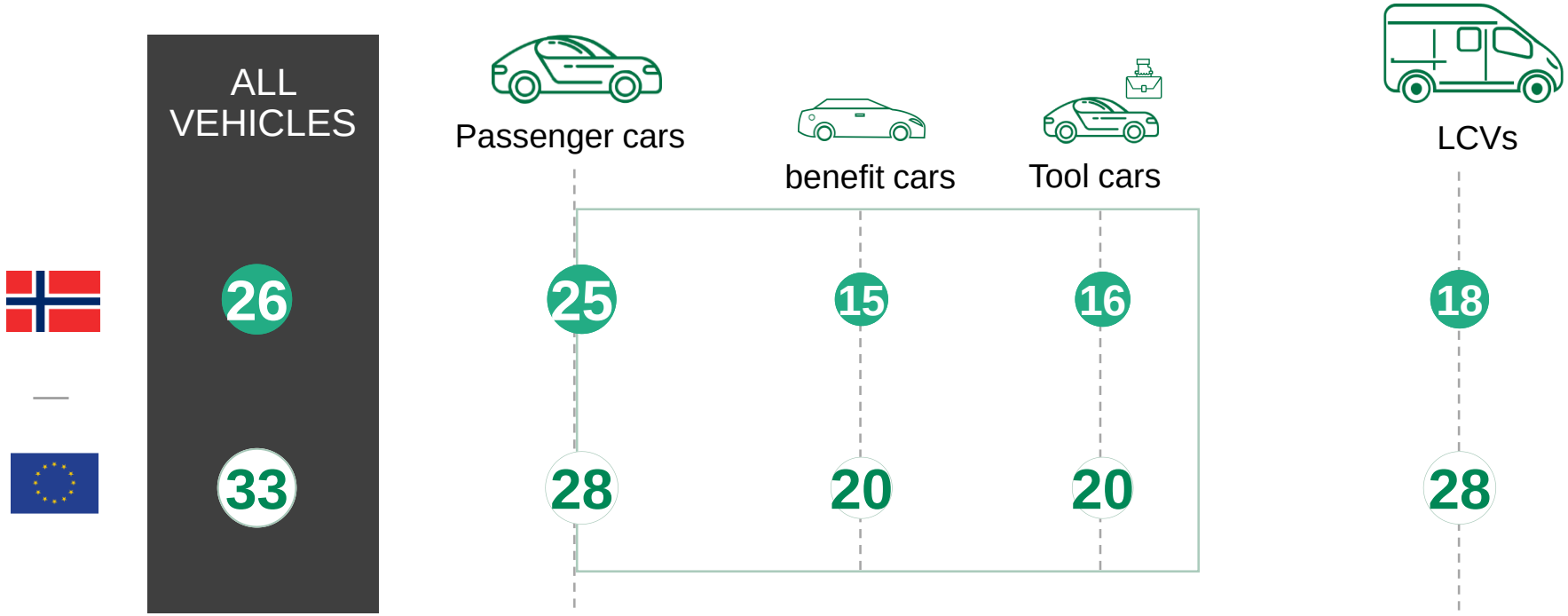
YES, FOR ALL THE FLEET + YES, FOR PART OF THE FLEET

In %

Passenger cars + LCVs

HOW TO READ THE RESULTS ?

26%,of companies with fleet use telematics for all or part of their fleet.
Among companies owning passenger cars, 25% use telematics for passenger cars, 15% use telematics for benefit cars, 16% for tool cars.
Among companies owning LCVs, 18% use telematics for LCVs.



Is your fleet connected thanks to Telematics tool? Telematics enables transmission of data 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 TELEMATICS

In %

Passenger cars + LCVs

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

	ALL VEHICLES	1	2	3	4
Norway	26	18	29	13	55
EU	33	20	31	39	50

Is your fleet connected thanks to Telematics tool? Telematics enables transmission of data 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 vehicles = 100%

8

TELEMATICS, DIGITAL TOOLS AND ROAD SAFETY

A. PASSENGER CARS

PROPORTION OF COMPANIES USING TELEMATICS

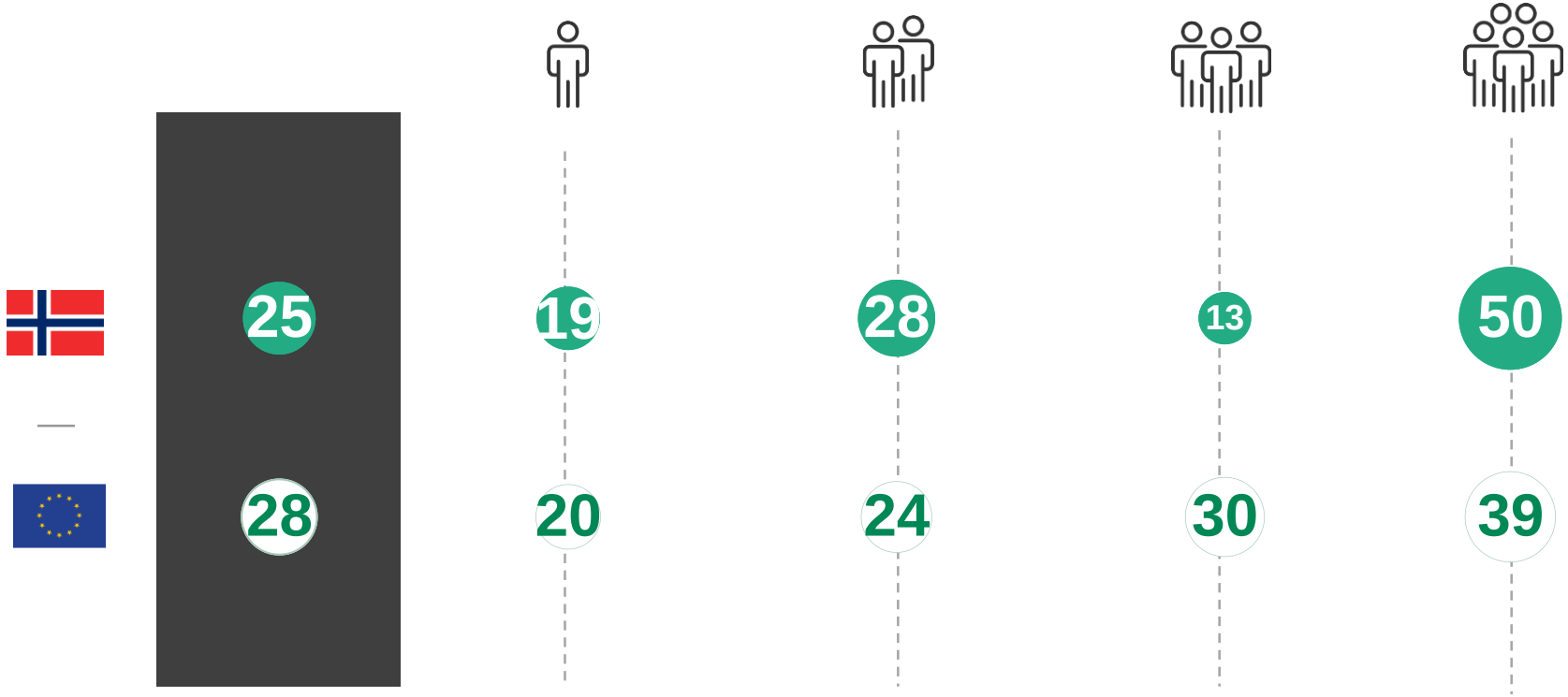
In %

Passenger cars

HOW TO READ THE RESULTS ?

Among companies owning passenger cars, 25% use telematics.

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



Basis: companies with at least one passenger car in fleet

Is your fleet connected thanks to Telematics tool? Telematics enables transmission of data 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

REASONS FOR USING TELEMATICS

Passenger cars

In %

Passenger cars

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

BARRIERS FOR USING TELEMATICS

Passenger cars

In %

Passenger cars

	Passenger cars	
You are not convinced that there will be a return on investment	41	45
You are not convinced that the data provided will be useful for your business operation	41	43
Telematics is too intrusive for the drivers	22	38
There is not enough resource available to manage the data effectively.	36	36
You have some concerns that employees will not accept it	22	35
You have some concerns on managing the data under GDPR	32	41
You have some concerns that Trade Unions or work councils may not accept it	24	28
You are not convinced that it works	22	24

What are the barriers to Telematics usage in the future?
Basis: companies with passenger cars which have not implemented Telematics

8

TELEMATICS, DIGITAL TOOLS AND ROAD SAFETY

D. LCVs

PROPORTION OF COMPANIES USING TELEMATICS

In %

LCVs

HOW TO READ THE RESULTS ?

Among companies owning LCVs, 18% use telematics for LCVs

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

Basis: companies with at least one LCV in fleet

	TOTAL	11	19	10	37
	18				
	28	17	26	30	42

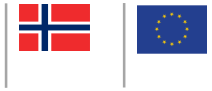
Is your fleet connected thanks to Telematics tool? Telematics enables transmission of data to monitor fuel consumption, driver behaviour, vehicle location, driver's impact on environment... from vehicles on the move. Data is transmitted by means of an original or after sales equipment or box installed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

REASONS FOR USING TELEMATICS

LCVs

In %

LCVs



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

BARRIERS TO TELEMATICS

LCVs

In %

LCVs

You are not convinced that there will be a return on investment	41	47
You are not convinced that the data provided will be useful for your business operation	39	41
There is not enough resource available to manage the data effectively.	28	37
Telematics is too intrusive for the drivers	26	33
You have some concerns that employees will not accept it	27	30
You have some concerns on managing the data under GDPR	26	28
You are not convinced that it works	25	26
You have some concerns that Trade Unions or work councils may not accept it	17	20

What are the barriers to telematics usage in the future?
Basis: companies with LCVs which have not implemented Telematics

GLOBAL COUNTRY INSIGHT : AN ADVANCED MARKET IN THE TRANSITION TO NEW ALTERNATIVES, LEAD BY BIG COMPANIES.

#1

A SMALL MARKET
as compared to Europe

#2

THE LEADER MARKET IN EUROPE,
in the energy mix transition.

#3

BIG COMPANIES LEAD THE WAY,
in the adoption of mobility alternatives.

#4

SELF PURCHASE IS THE MOST USED SOLUTION,
closely followed by finance leasing.

#5

A MODERATE USAGE OF TELEMATICS,
driven by fleet cost reduction.

THANK YOU

KANTAR

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