



**Corporate Vehicle
Observatory**



GREENING THE FLEET SECTOR

Environmental optimisation
in crisis time

June 8th, 2009



ARVAL
BNP PARIBAS GROUP

Agenda

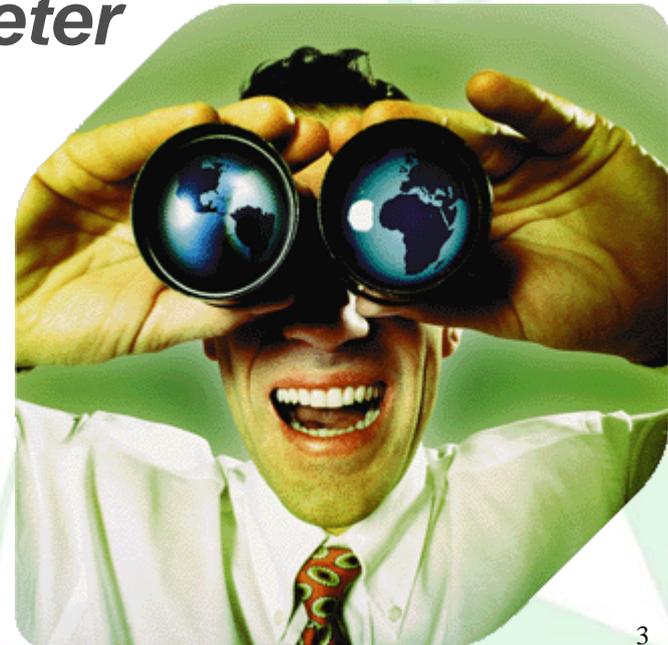
1. **The Corporate Vehicle Observatory**
2. **Fleet management in crisis time**
3. **Younger fleets, greener fleets**
4. **The choice of the cars**
5. **Involving the driver**
6. **The own resources of businesses**

Part 1

The Corporate Vehicle Observatory

What is it?

The International Fleet Barometer





Management
of vehicles

Sustainable
development



Prevention
of road risks

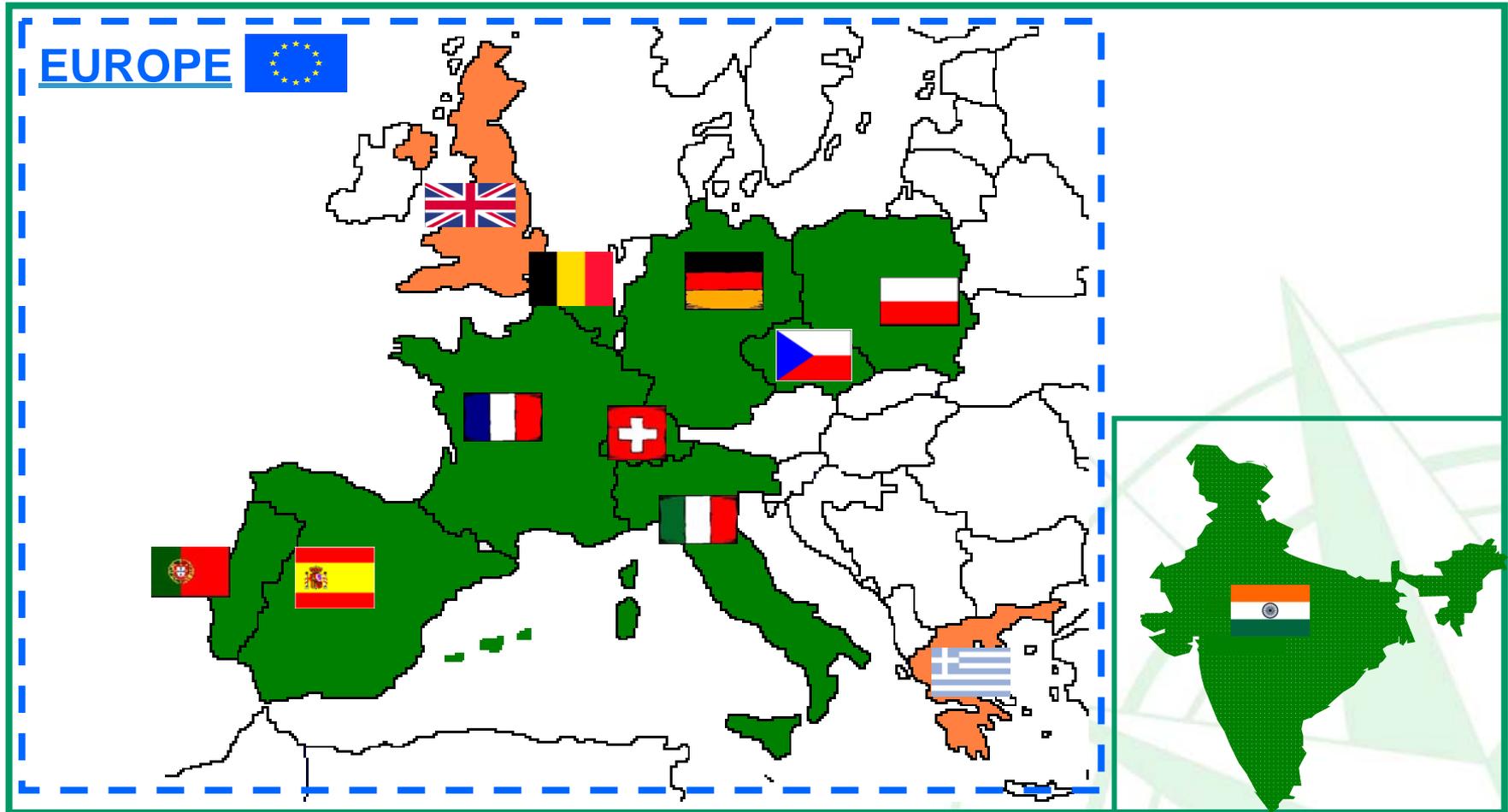
New
Technologies



www.corporate-vehicle-observatory.com

- **An expert-platform for all fleet professionals:**
fleet managers, procurement specialists, manufacturers, leasing companies, advisers, insurers, press, public authorities, researchers etc.
- **Created by Arval in 2003**
- **Launched in UK in 2009**
- **Neutral & International**

12 countries covered by the study in 2009
including 2 new members : UK and Greece





Management
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Sustainable
development



Prevention
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- **An expert-platform for all fleet professionals:**
fleet managers, procurement specialists, manufacturers, leasing companies, advisers, insurers, press, public authorities, researchers etc.
- **Created by Arval in 2003**
- **Launched in UK in 2009**
- **Neutral & International**
- **Focus: professional Mobility**
- **Cost free Studies**
- **Annual Fleet Barometer in collaboration with **
 - Analysis of the decision-makers' attitudes on fleets
 - Overview of the main trends of the automotive market
 - Comparison of trends on 12 countries



- **Sample: 3 379 interviews through Europe:**
- **Target: Companies of all industries using corporate vehicles**
- **Fieldwork period: From January 2009 to March 2009**
- **Data collection method: Per telephone**



Companies with

Less than 10
employees

Companies with

10 to 99
employees

Companies with

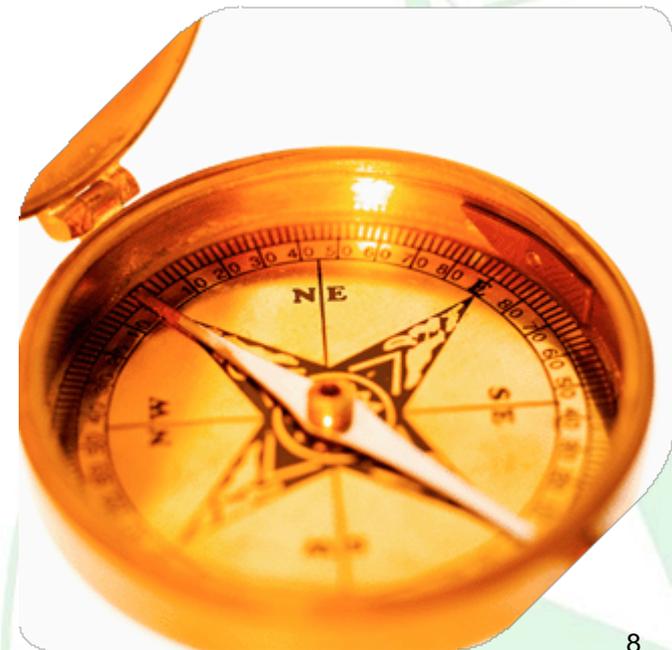
100 to 999
employees

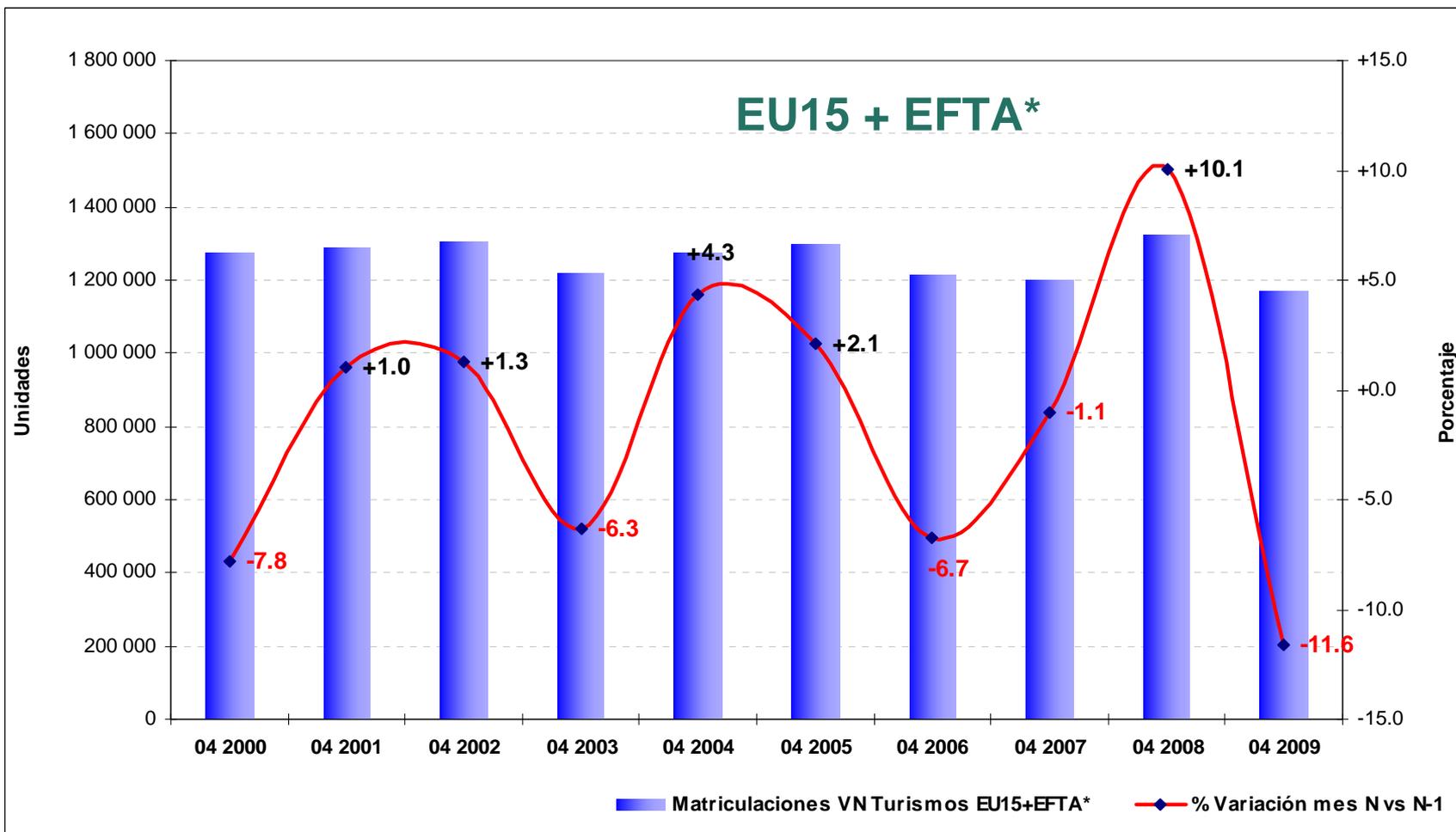
Companies with

1000 employees
and +

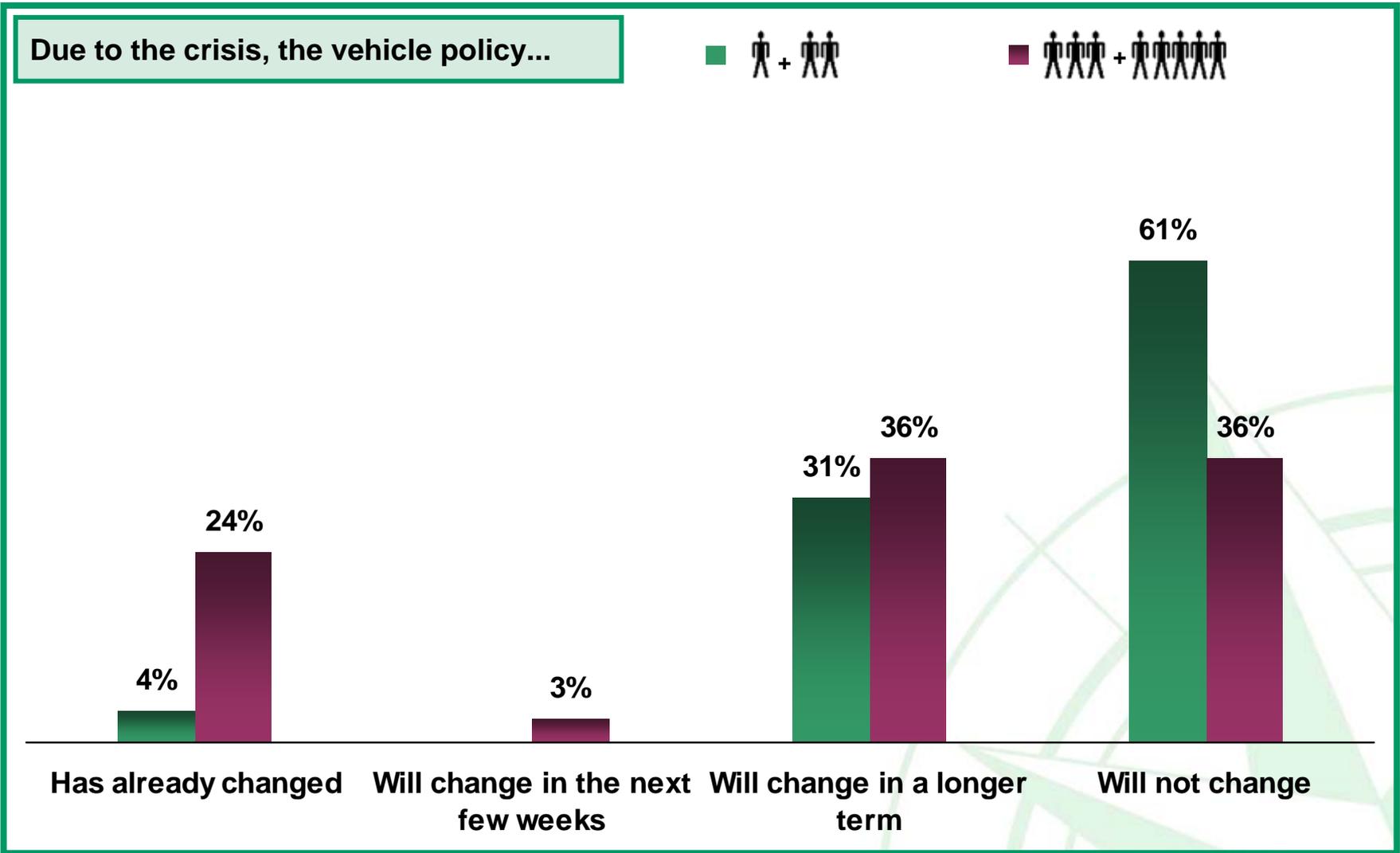
Part 2.

Fleet management in crisis time



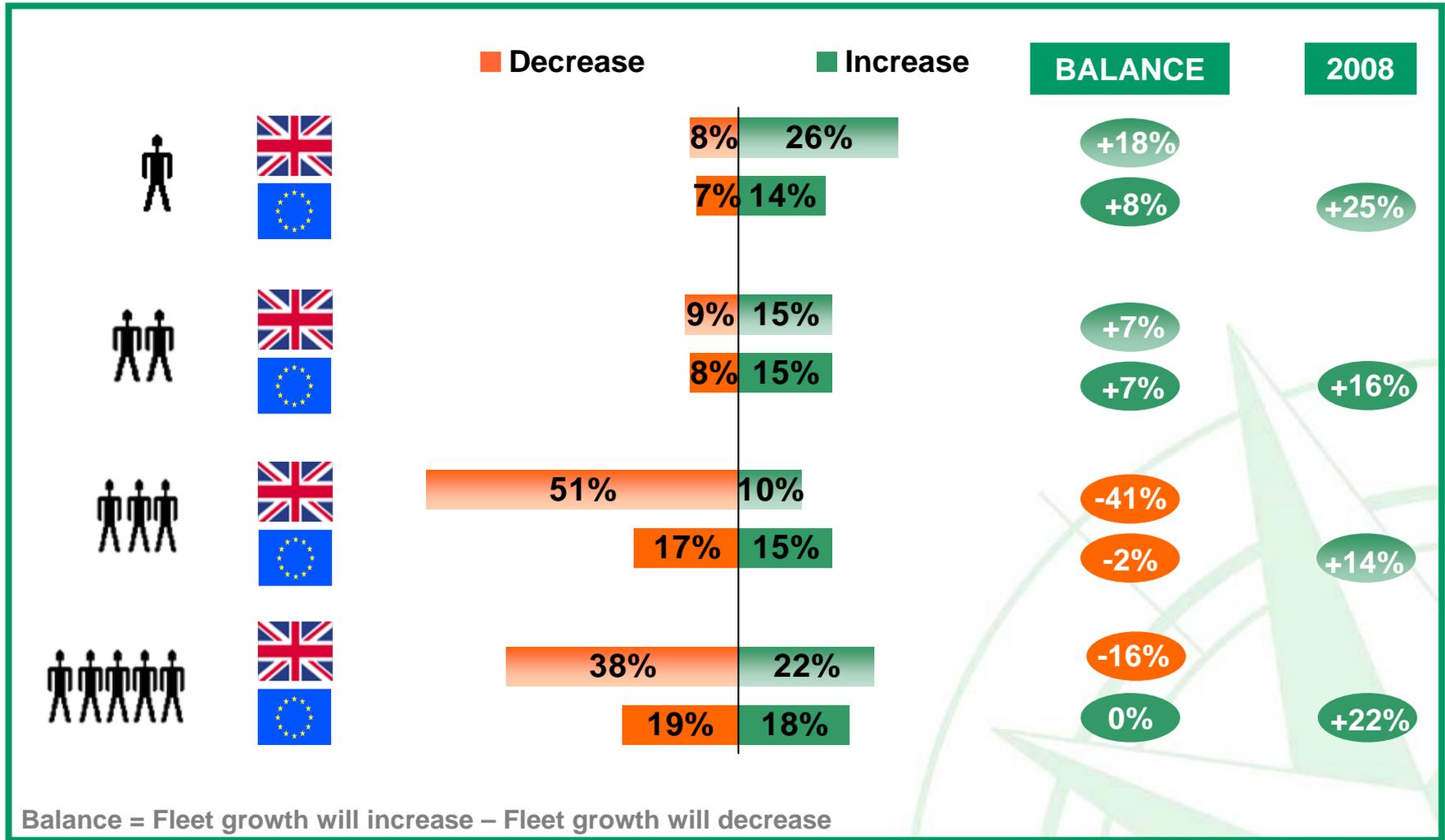


*EFTA=Island, Norway & Switzerland
Source: ACEA



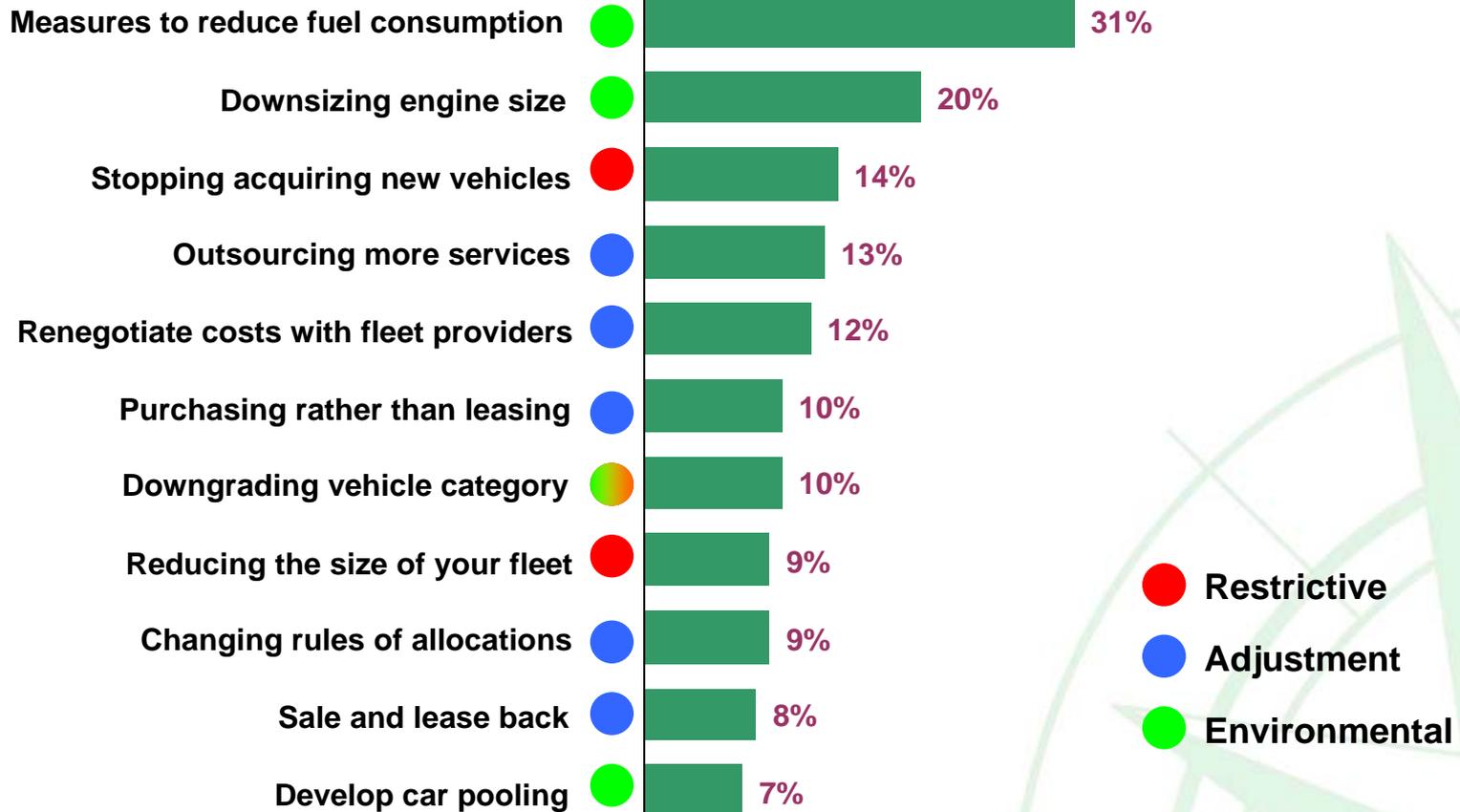
Base: companies with corporate vehicles = 100%

Comparison with EUROPE



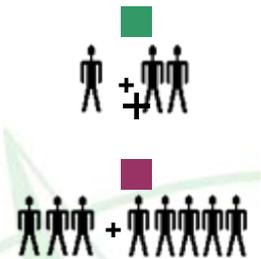
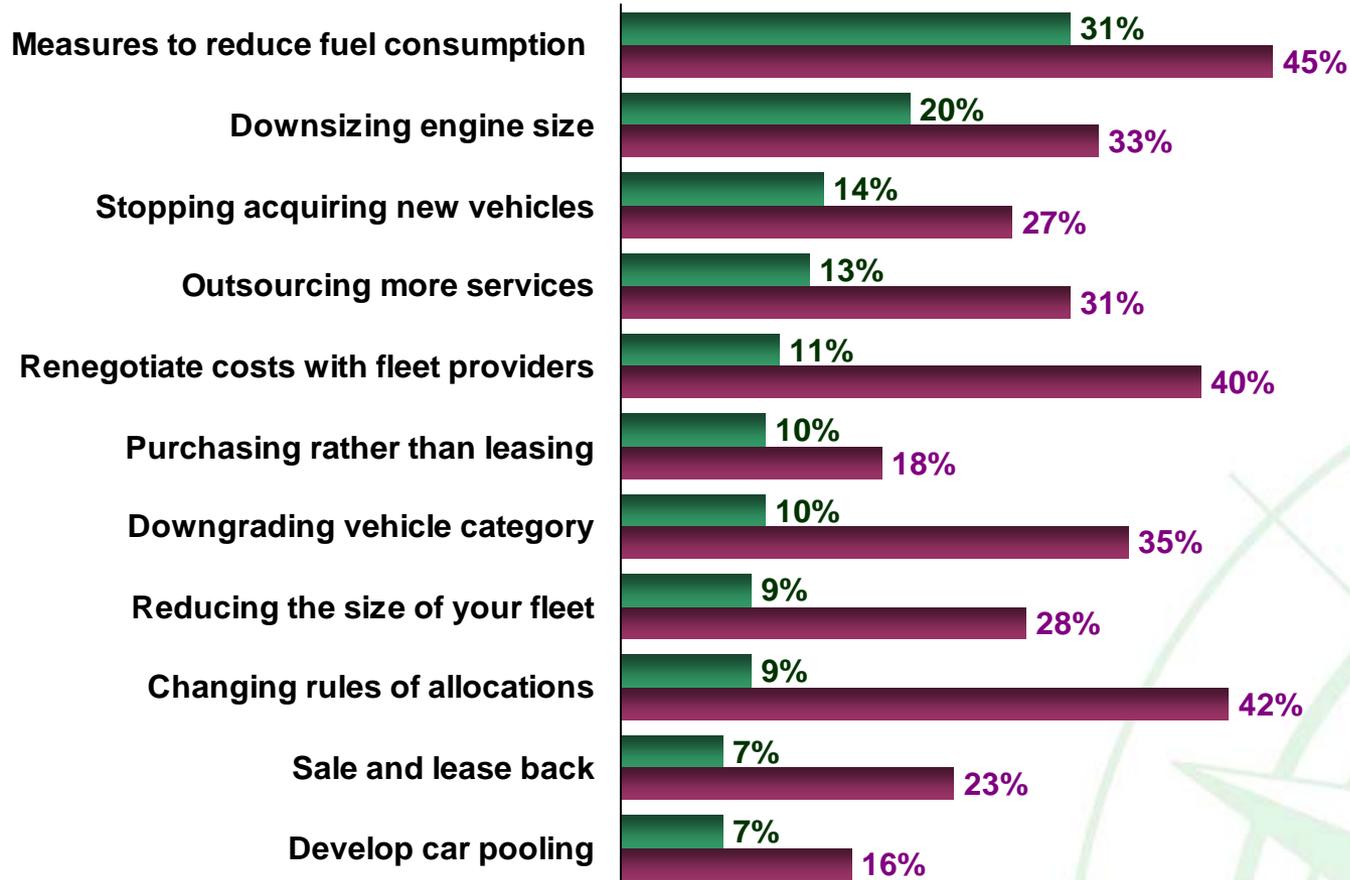
Base: companies with corporate vehicles = 100%

% who considers introducing this measure as an answer to the crisis



Base: companies with corporate vehicles = 100%

% who considers introducing this measure as an answer to the crisis

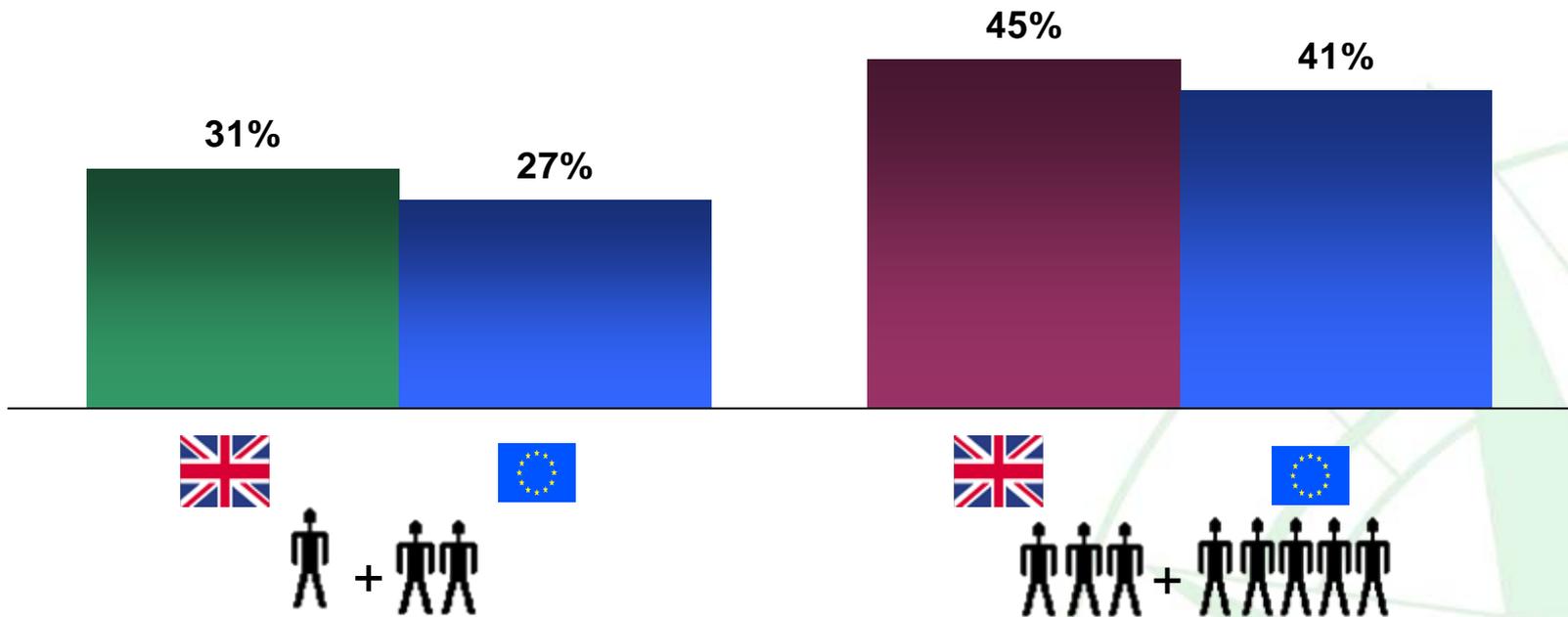


Base: companies with corporate vehicles = 100%

Comparison with EUROPE



% who considers negotiating better discounts from manufacturers is a main concern

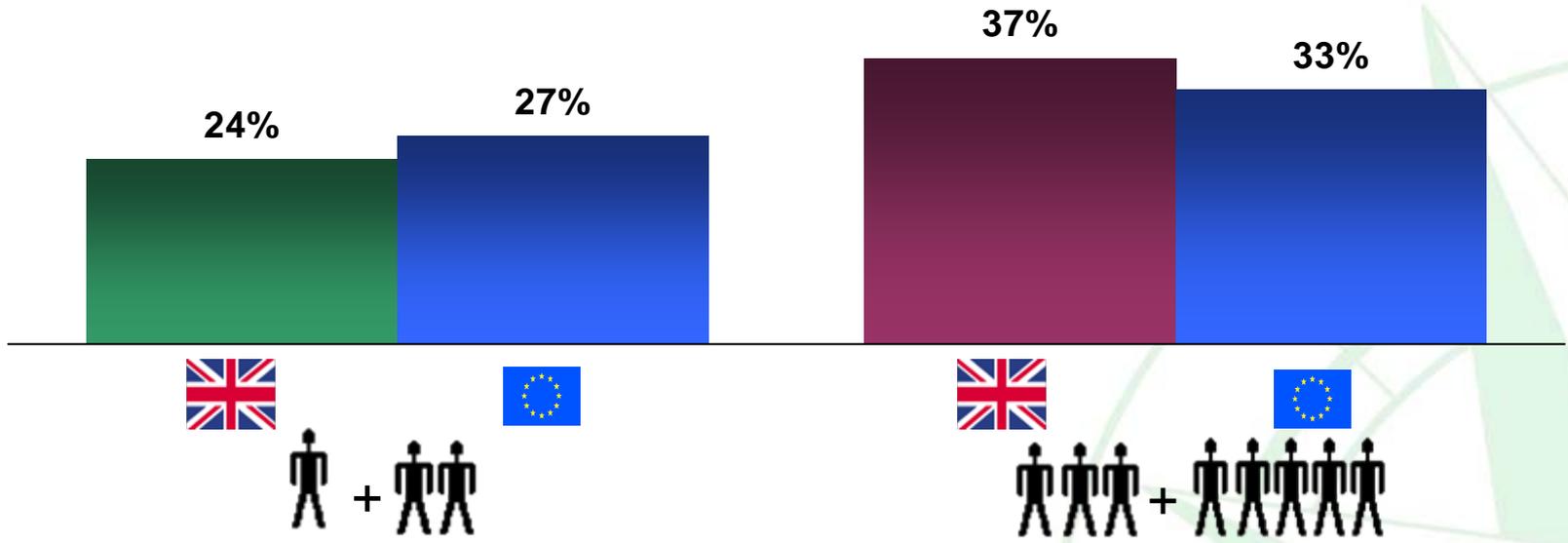


Base: companies with corporate vehicles = 100%

Comparison with EUROPE



% who considers reducing the purchasing cost of cars is a main concern



Base: companies with corporate vehicles = 100%

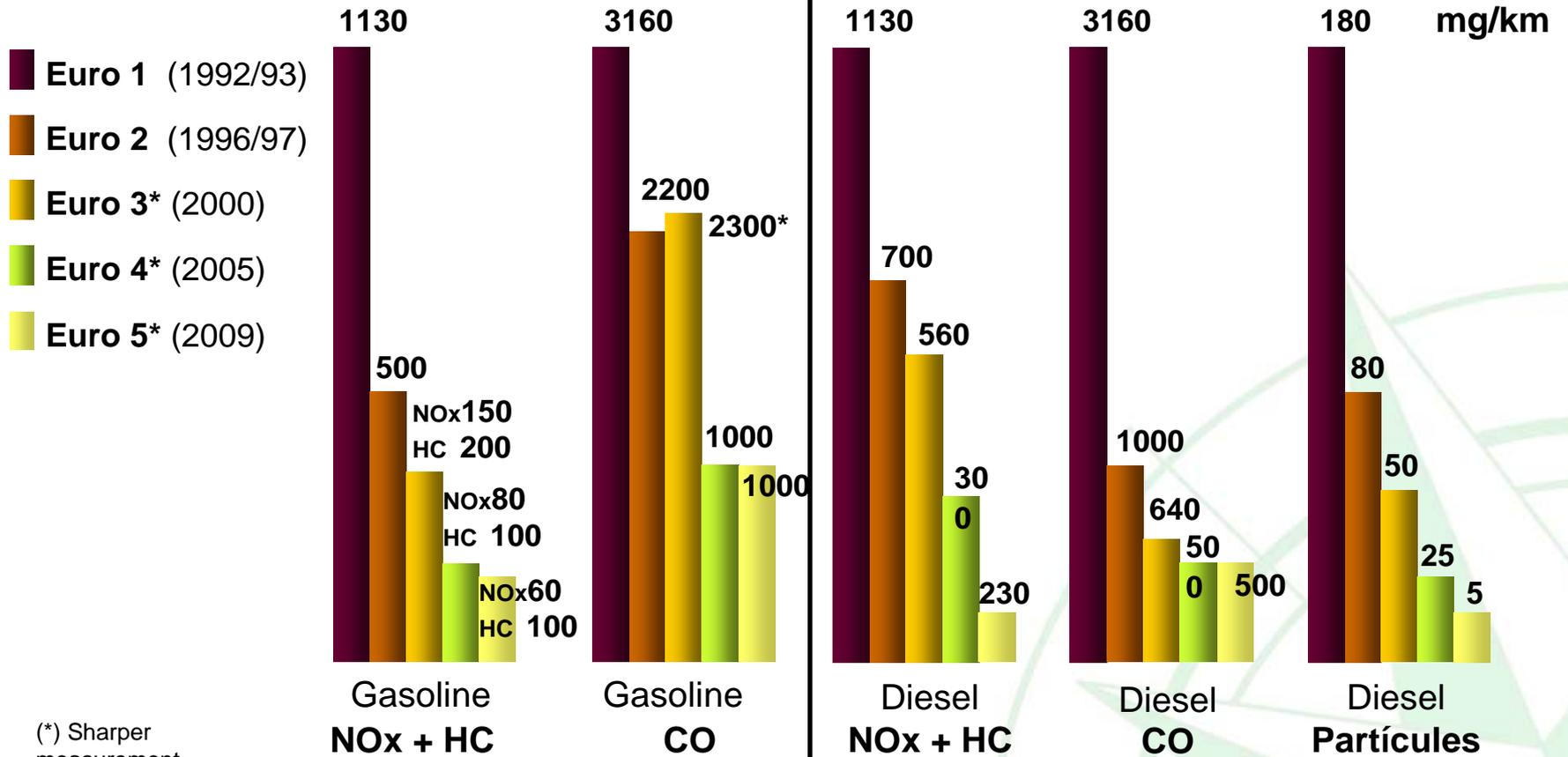
Part 3

Younger fleets, greener fleets

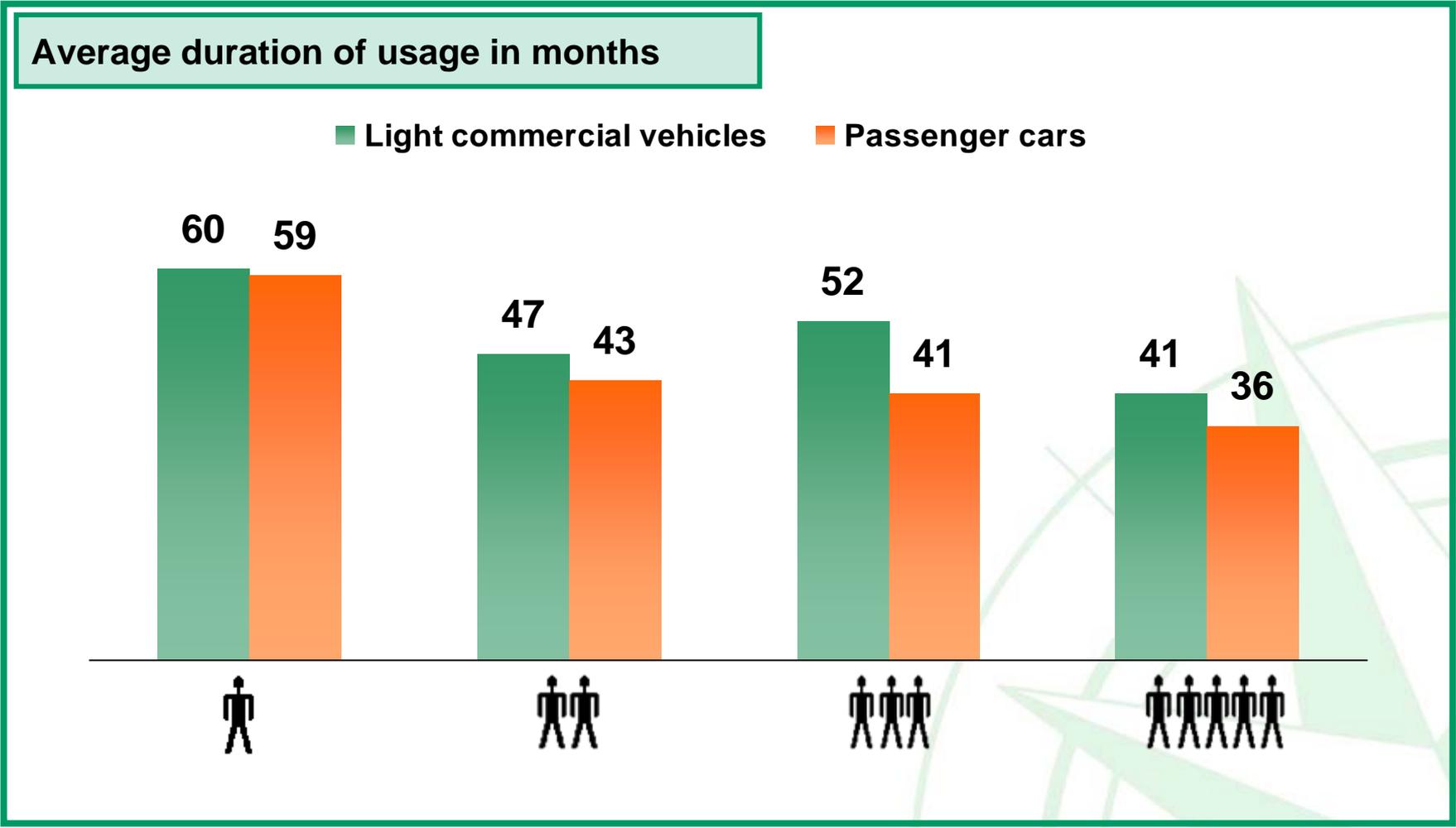


Gasoline

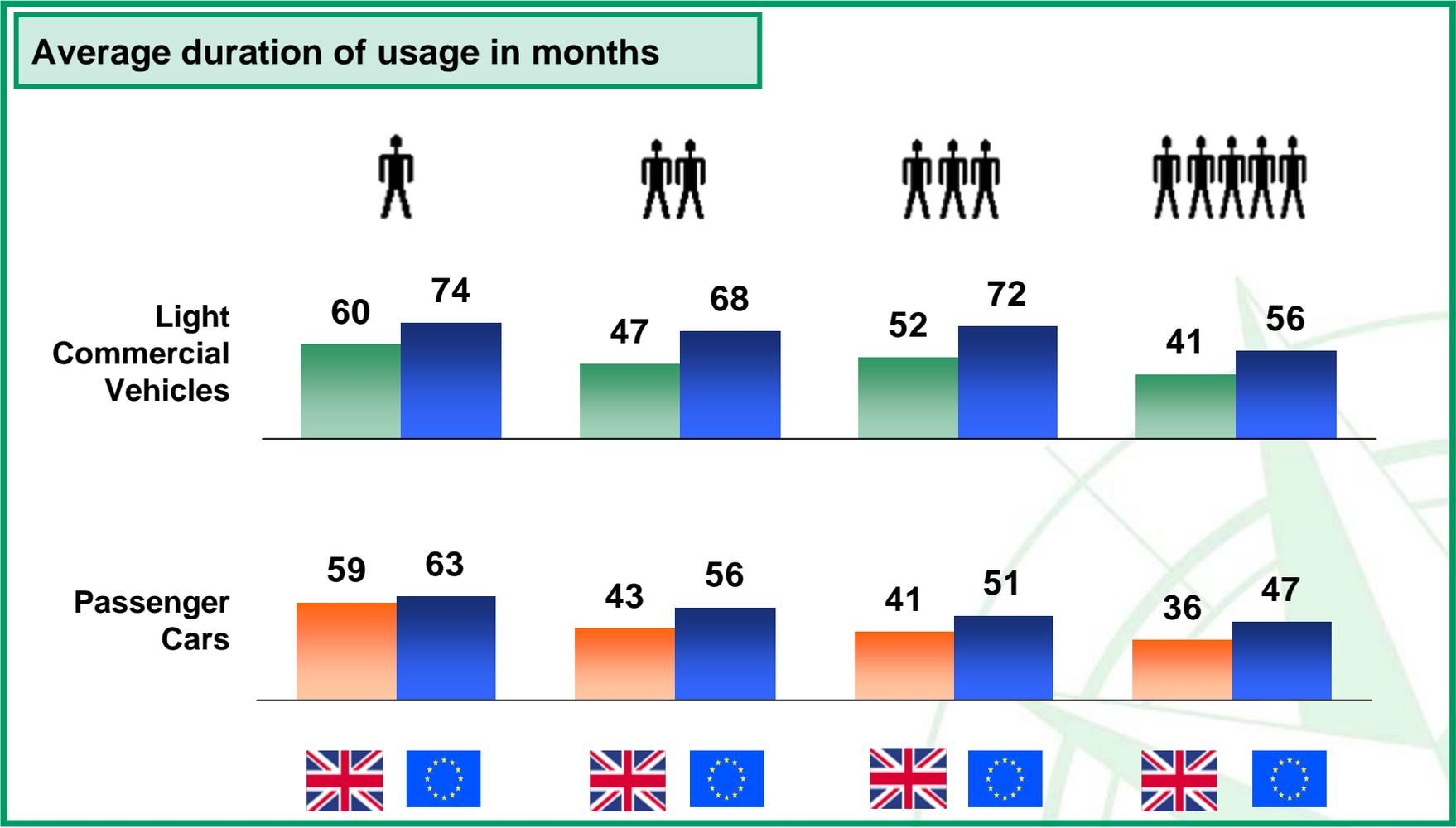
Diesel



(*) Sharper measurement method as from Euro 3



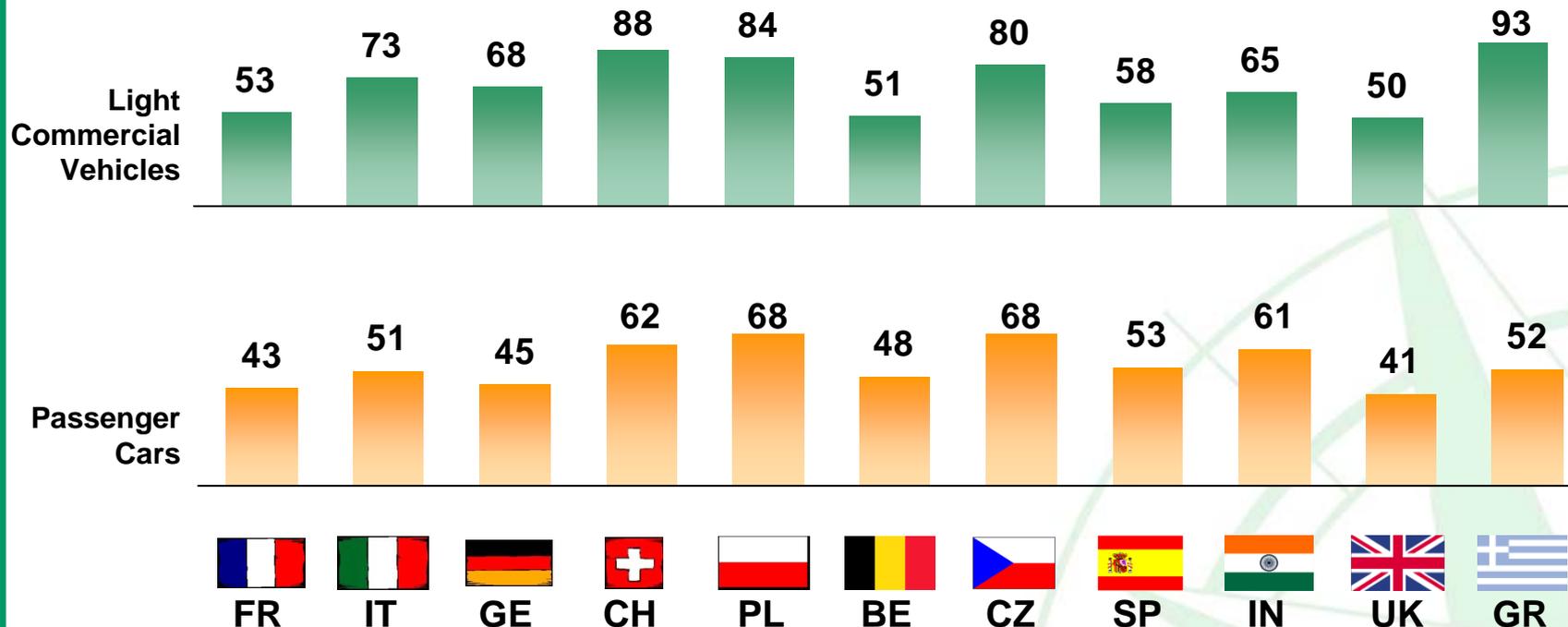
Base: companies with corporate vehicles = 100%



Base: companies with corporate vehicles = 100%



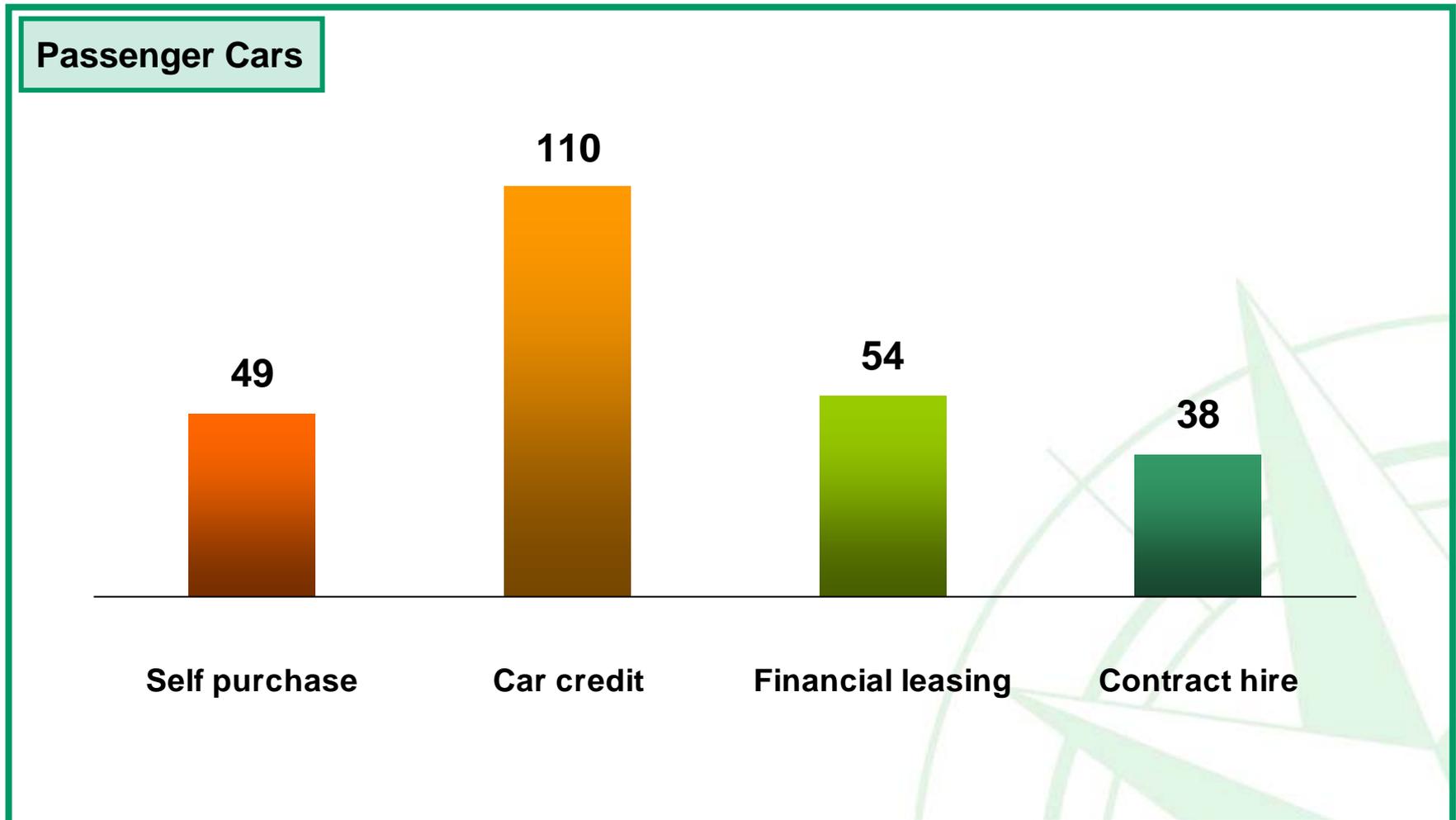
Average duration of usage in months



Base: companies with corporate vehicles = 100%

Average duration of usage of the vehicles according to main financing method

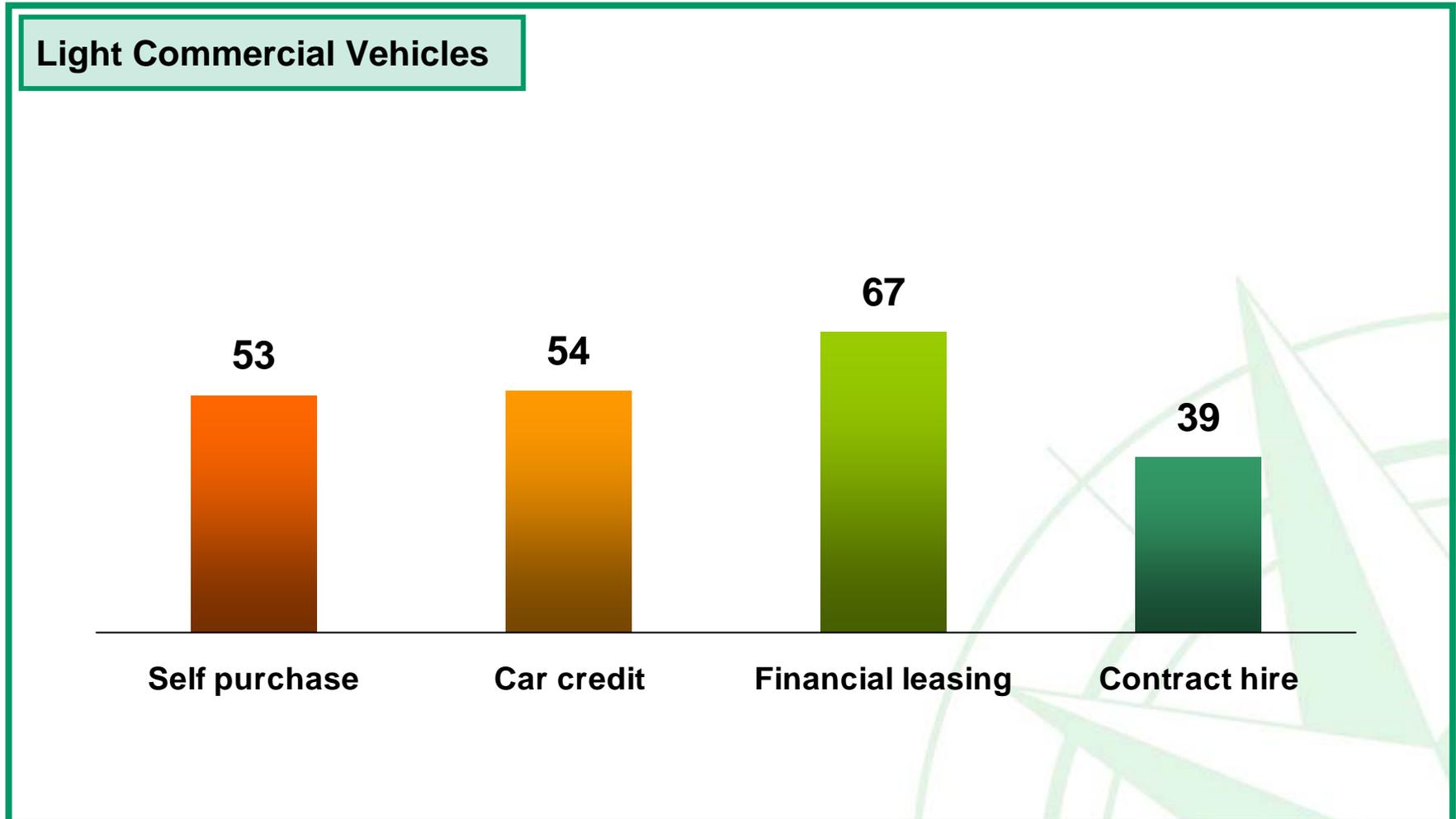
In months



Base: companies with corporate vehicles = 100%

Average duration of usage of the vehicles according to main financing method

In months



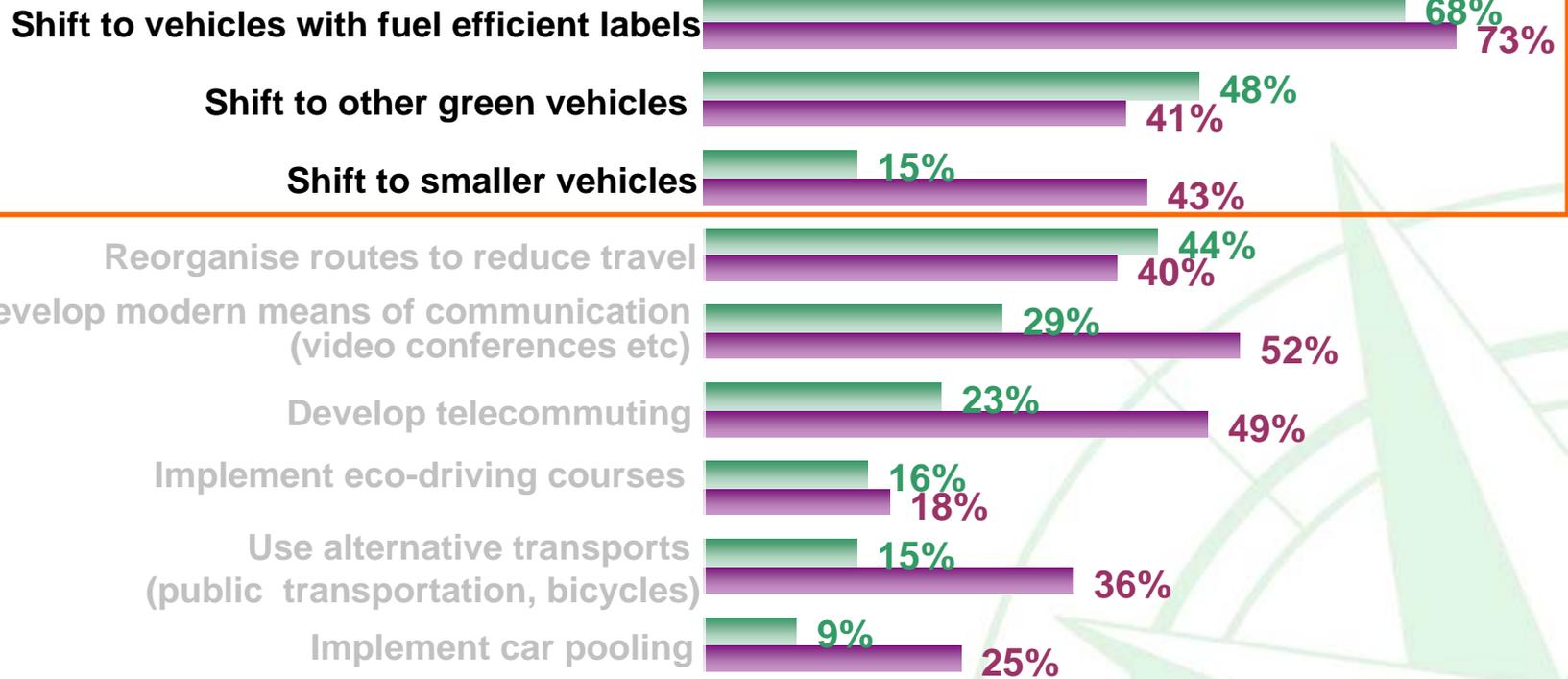
Base: companies with corporate vehicles = 100%

Part 4

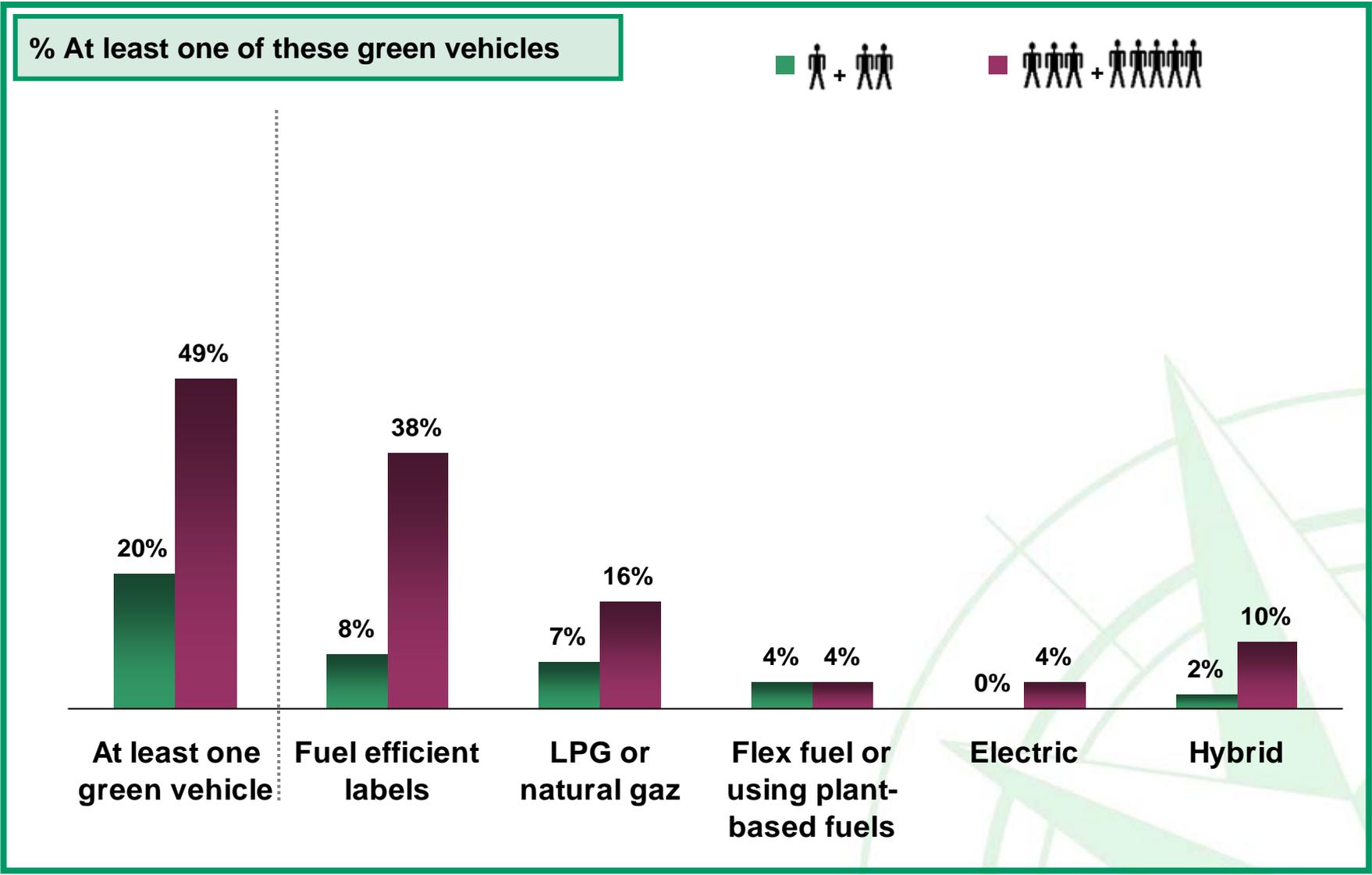
The choice of the cars



% Planned to be encouraged in the next 2 years

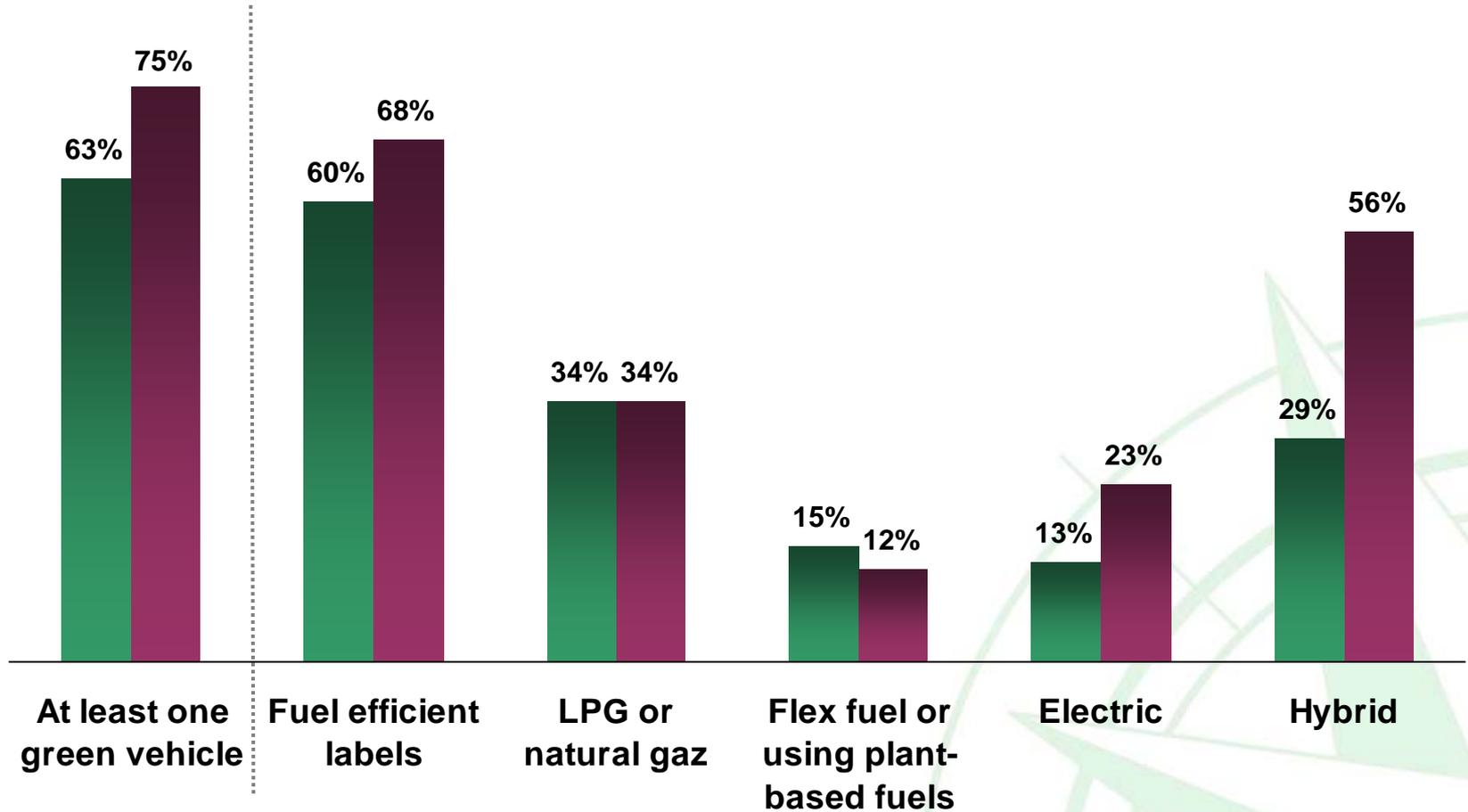


Base: companies with corporate vehicles = 100%



Base: companies with corporate vehicles = 100%

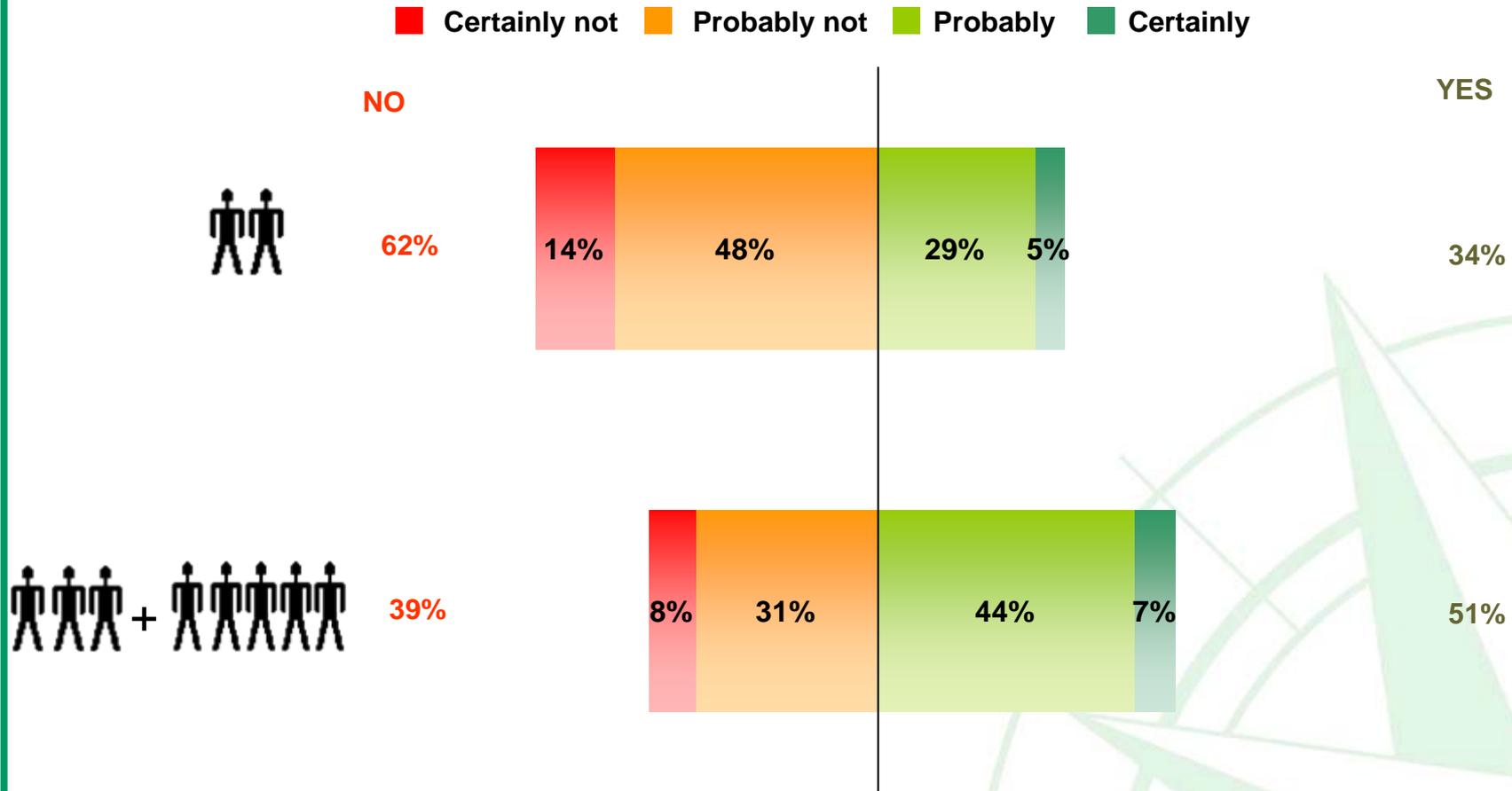
% Planned to be used in the next 3 years



Part 5. **Involving the driver**



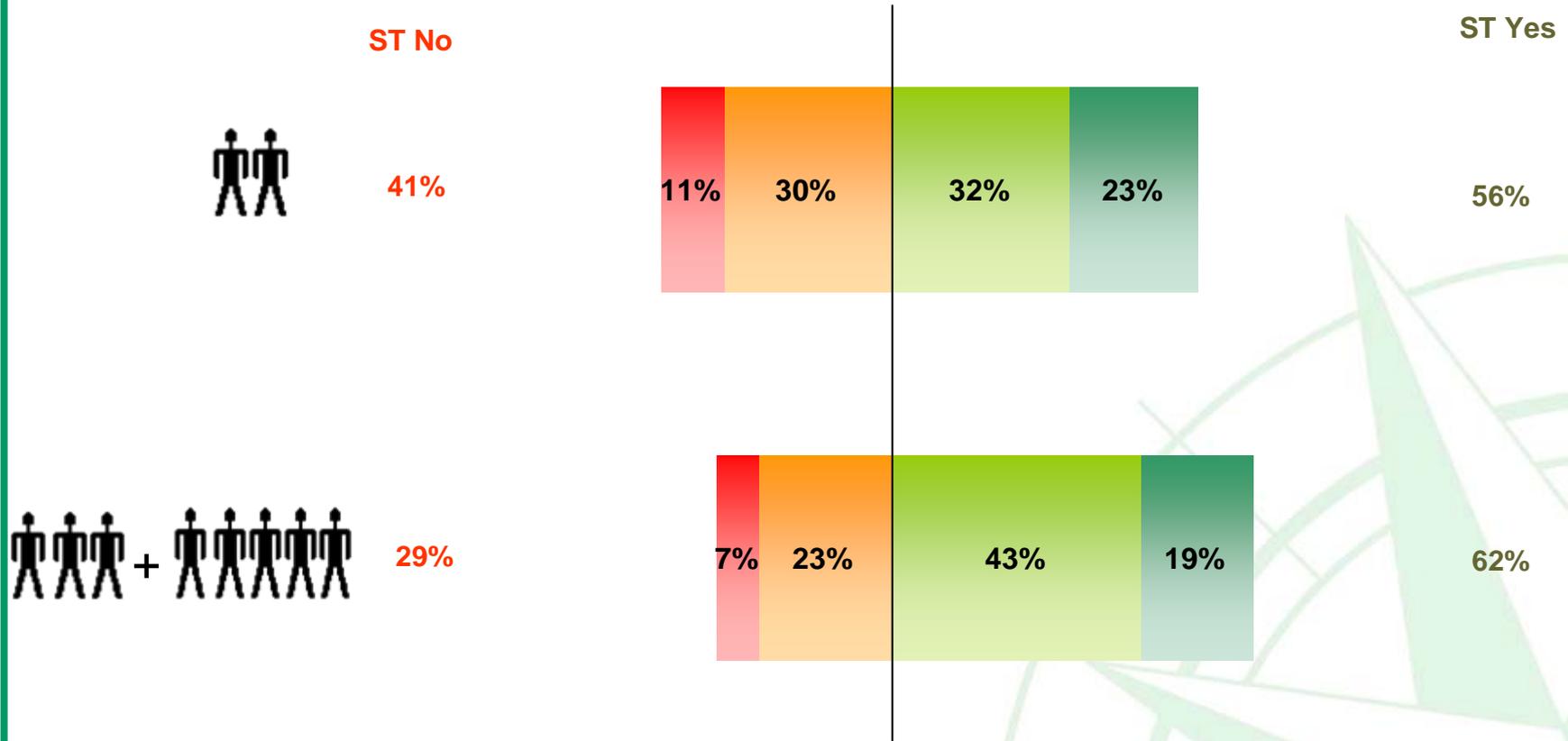
% Drivers would be ready to take part in eco-driving training



Base : companies with 10 or more employees = 100%

% Drivers would be ready to take part in road safety training

■ Certainly not
 ■ Probably not
 ■ Probably
 ■ Certainly



Base : companies with 10 or more employees = 100%

% Drivers would be ready to use "green" vehicles

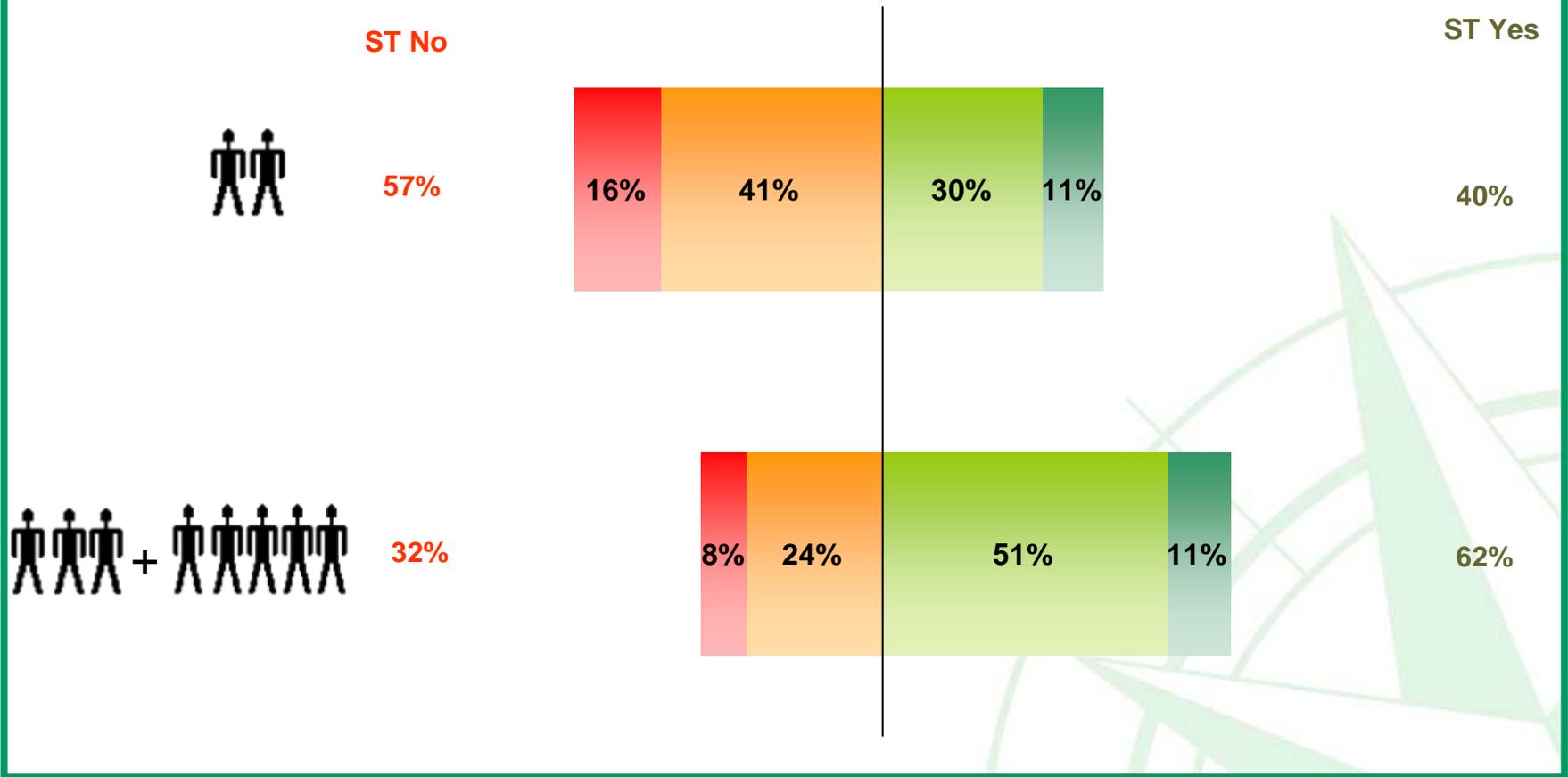
■ Certainly not
 ■ Probably not
 ■ Probably
 ■ Certainly



Base : companies with 10 or more employees = 100%

% Drivers would be ready to participate in a challenge with incentives to reduce their CO2 emissions

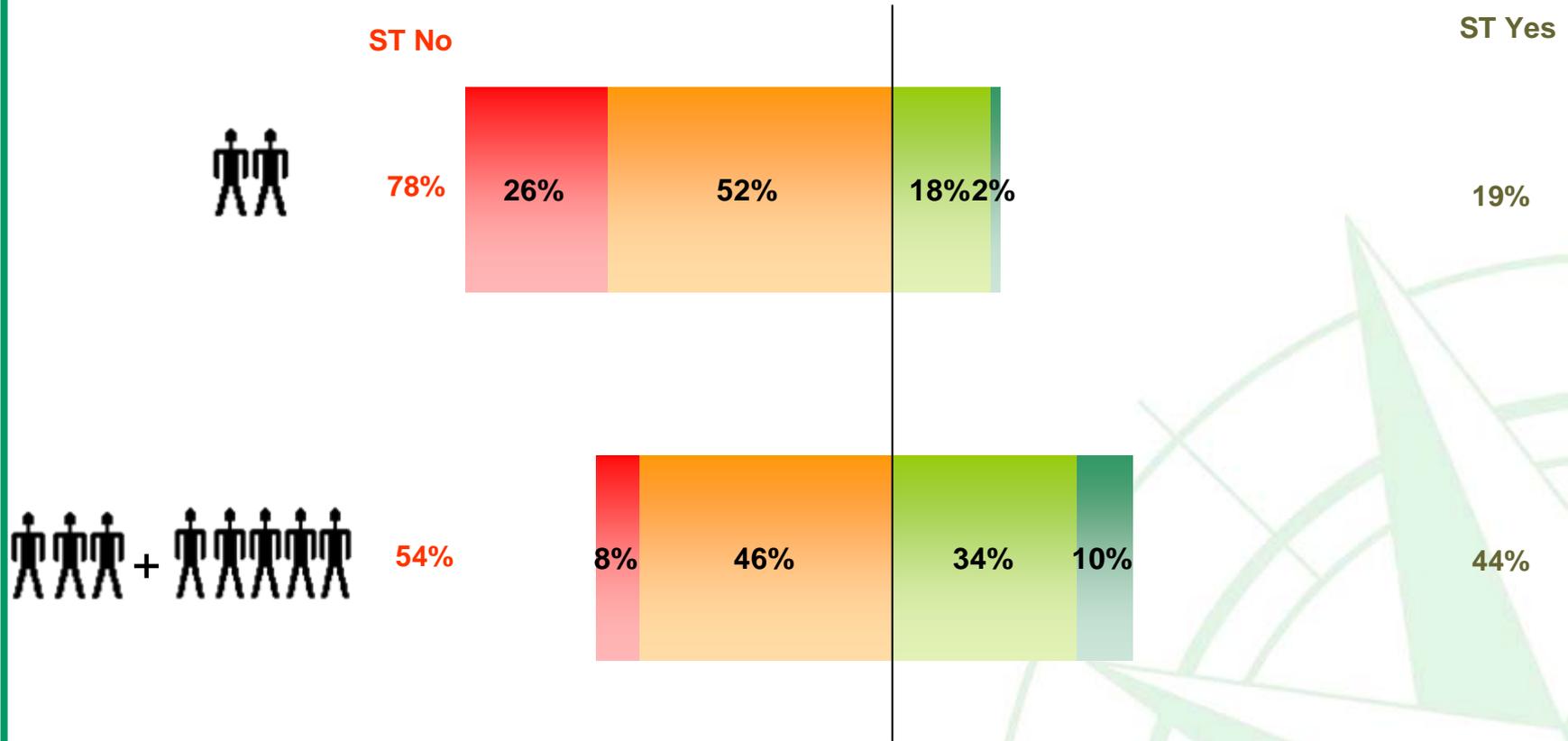
■ Certainly not
 ■ Probably not
 ■ Probably
 ■ Certainly



Base : companies with 10 or more employees = 100%

% Drivers would be ready to drive a smaller vehicle

■ Certainly not
 ■ Probably not
 ■ Probably
 ■ Certainly



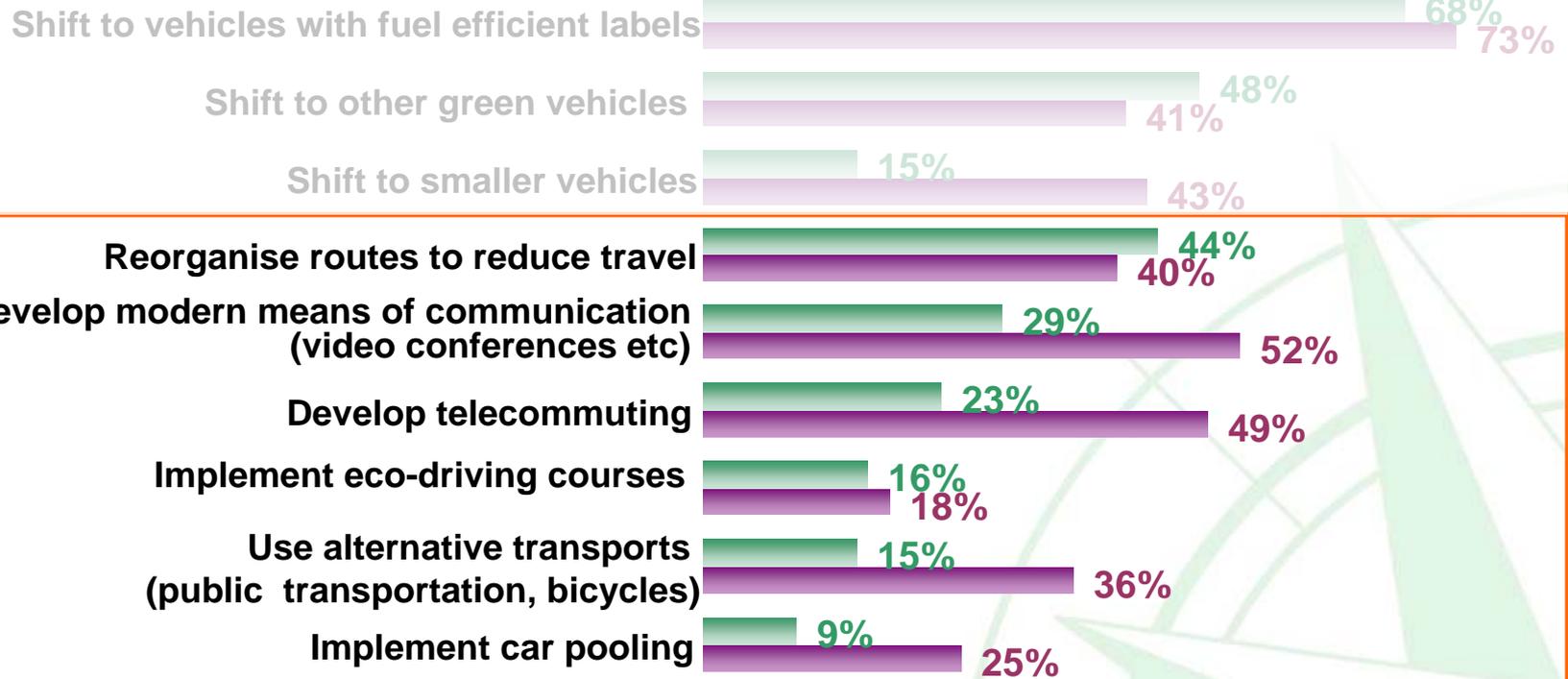
Base : companies with 10 or more employees = 100%

Part 6.

The own resources of the businesses



% Planned to be encouraged in the next 2 years



The logo features the text "Corporate Vehicle Observatory" centered within a white oval shape. The oval is defined by two thick, dark green curved lines, one above and one below the text. The background of the entire slide is white, with dark green curved shapes on the left and right sides, suggesting a larger circular frame.

Corporate Vehicle
Observatory