DATAFORCE

E-Mobility in Fleets 2022 – EU 5

Fleet analysis and fleet manager survey in France, Germany, Italy, Spain and UK

May 2022

E-Mobility in Fleets 2022 – EU 5

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- Top Brands and Models in EU 5 countries

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- Conditions for fleet electrification
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- Charging options at the company and payment at public charging points
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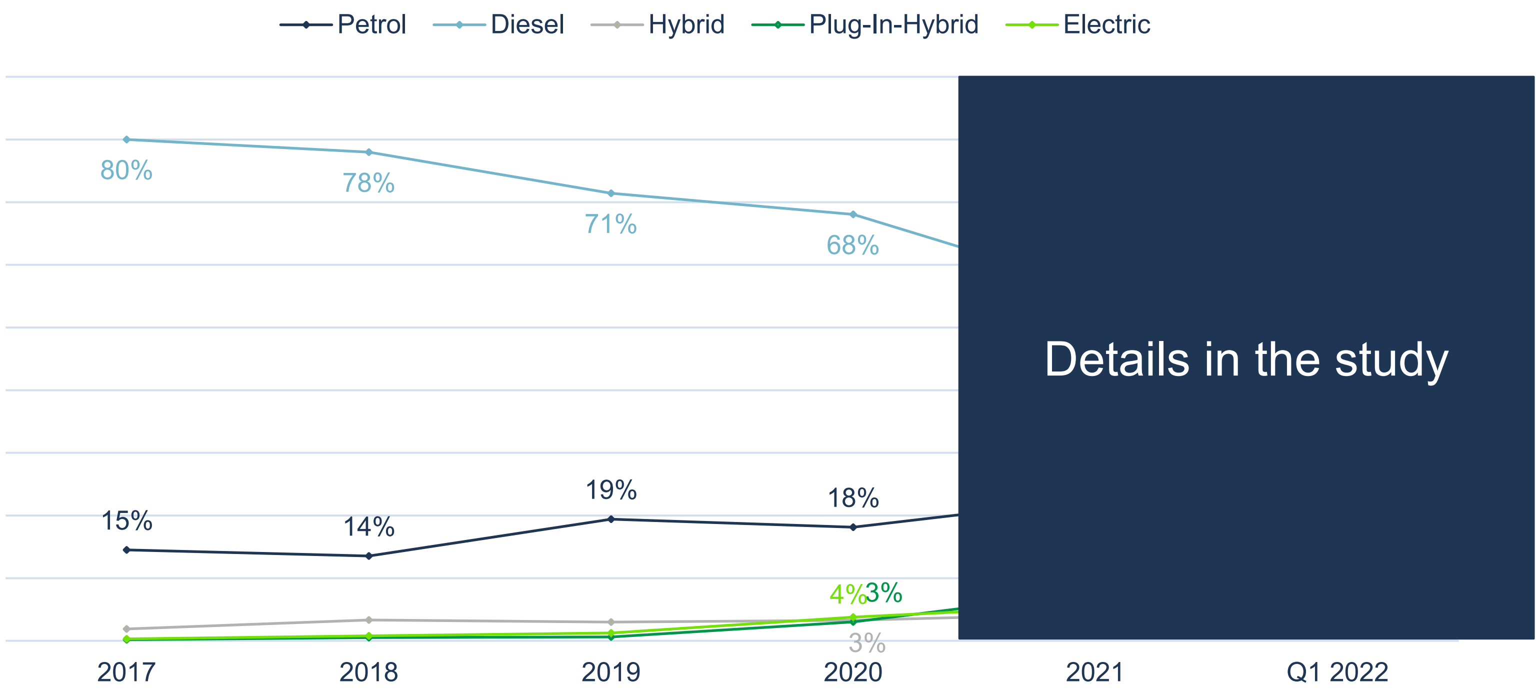
III. Brand image and prices

- First brand in mind for e-vehicles
- Rating of 15 brands in terms of their technological progress in the filed of e-vehicles
- Optimal Price Point for 8 EV models

E-vehicles represent only 4% of new registrations in True Fleets in Italy

New car registrations in True Fleets 2017 – Q1 2022 **Italy**



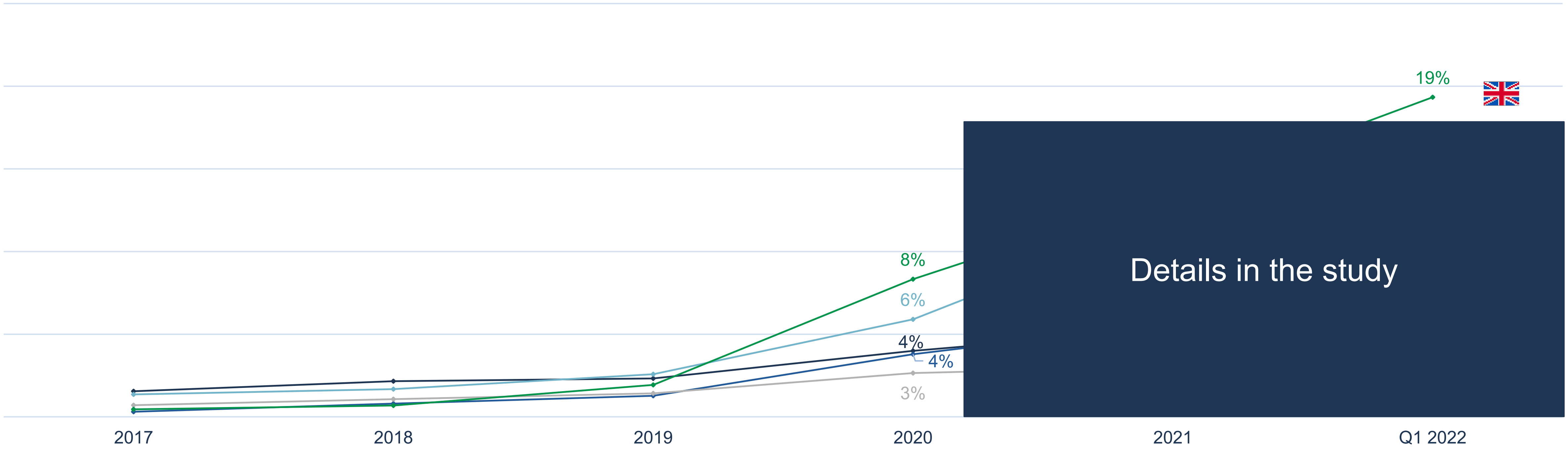
Government subsidies

- BEVs and all hybrids are exempt from vehicle tax for 5 years; after they pay only 25% of the normal tax rate
- Taxation of imputed income for comany cars is reduced by 17%
- Some regions and cities offer further subsidies
- Purchase premium of 3.000 € for BEVs and 2.000 € for PHEVs can only be claimed by private individuals

- As the purchase premiums for alternative drives in Italy can only be claimed by private individuals, the share of these vehicles in True Fleets is even lower than in the other EU 5 countries
- At the beginning of 2022, the share of e-vehicles even decreased again from 6% to 4% compared to 2021
- Diesel still account for over 50% of new car registrations

UK with strongest and continuous growth of e-vehicles

Share of new **e-vehicle** registrations in True Fleets 2017 – Q1 2022

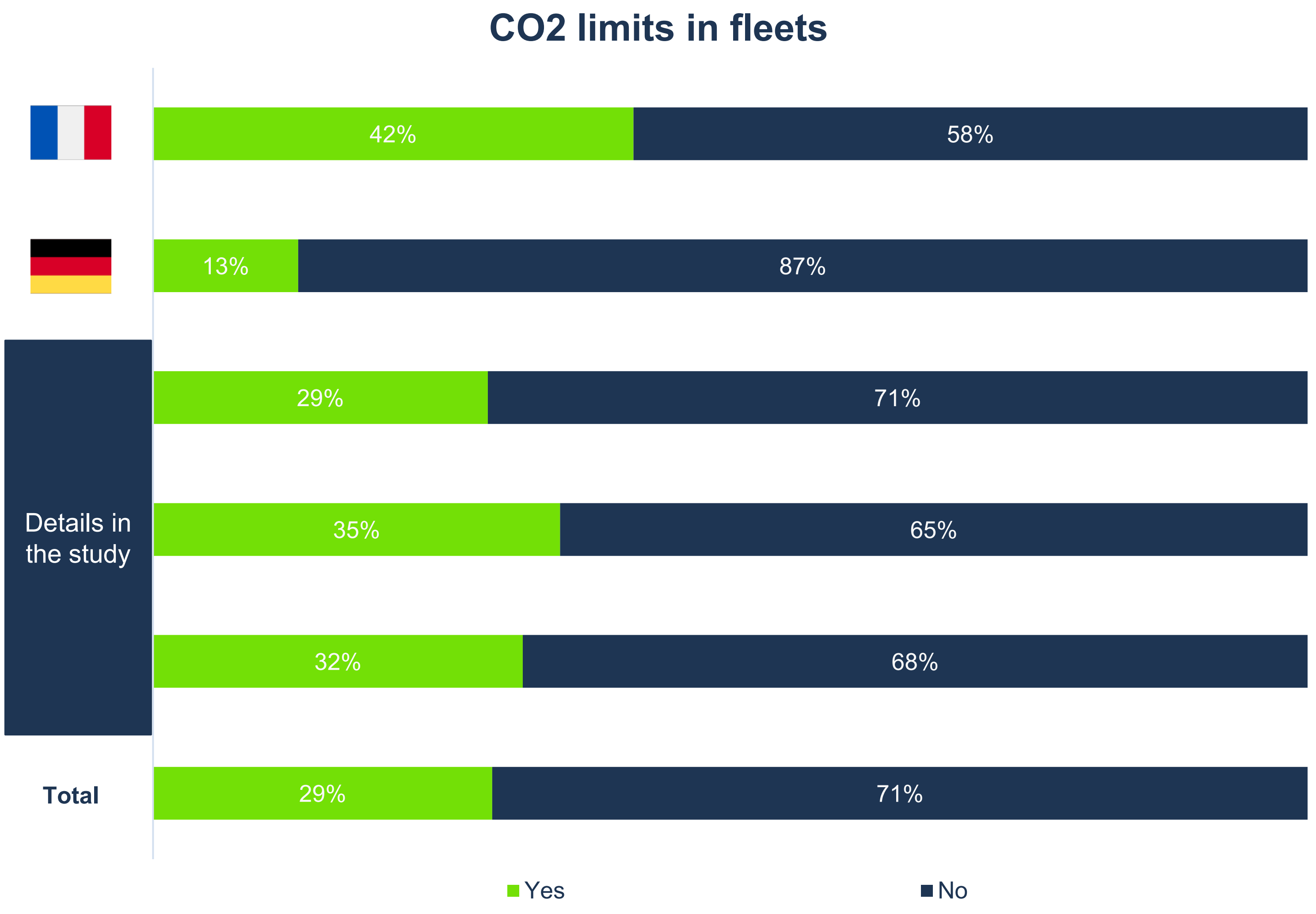


- From 2030, only BEVs and PHEVs may be sold in the UK; people and companies already seem to be adapting to this: UK can boast by far the highest e-vehicle share in True Fleets in 2022, moreover, it is the only country that will significantly increase this share again in early 2022
- While the share of e-vehicles in Germany is stagnation at the 2021 level, it is declining in Italy; slightly growth continues in France and Spain

IRIS® - All new e-vehicles registrations in True Fleets, Q1 2002 n= 86.833

Fleets in France far ahead in terms of CO2 limits

CO2 limits in fleets

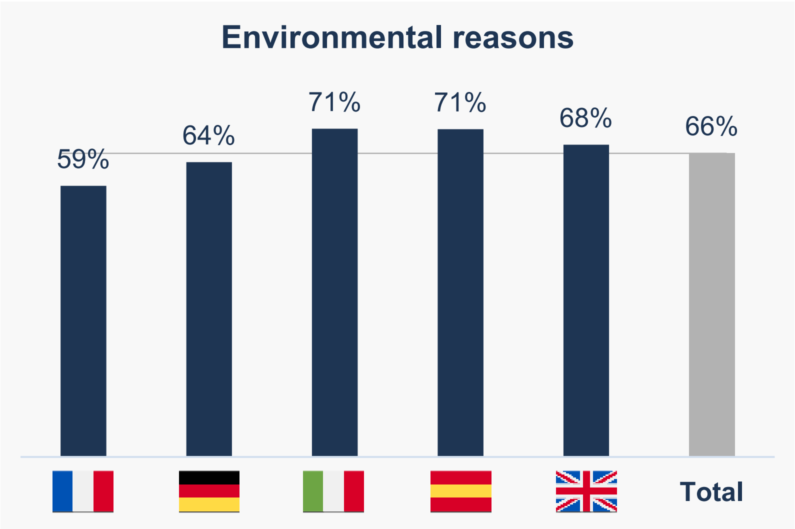


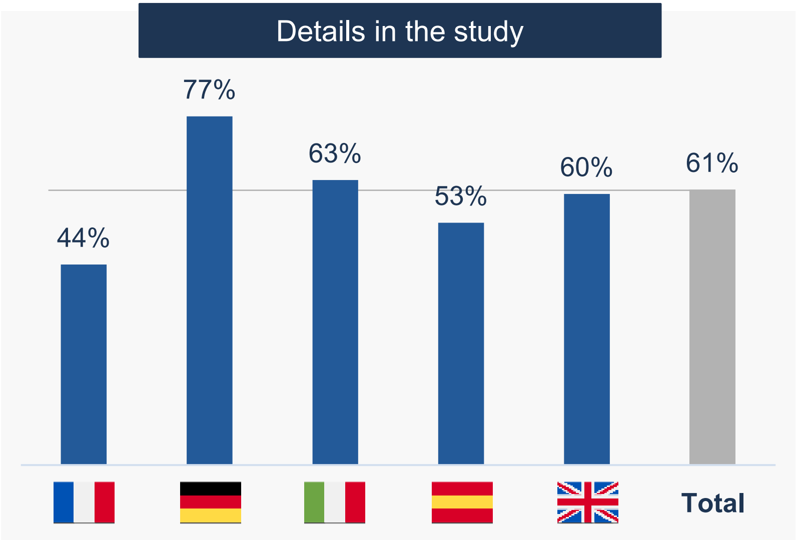
- Even though environmental reasons are not the key driver for switching to e-mobility in French fleets, they are ahead by far in terms of CO2 limits
- Surprisingly German fleets, which are generally organized well and regulated, don't care about CO2 limits

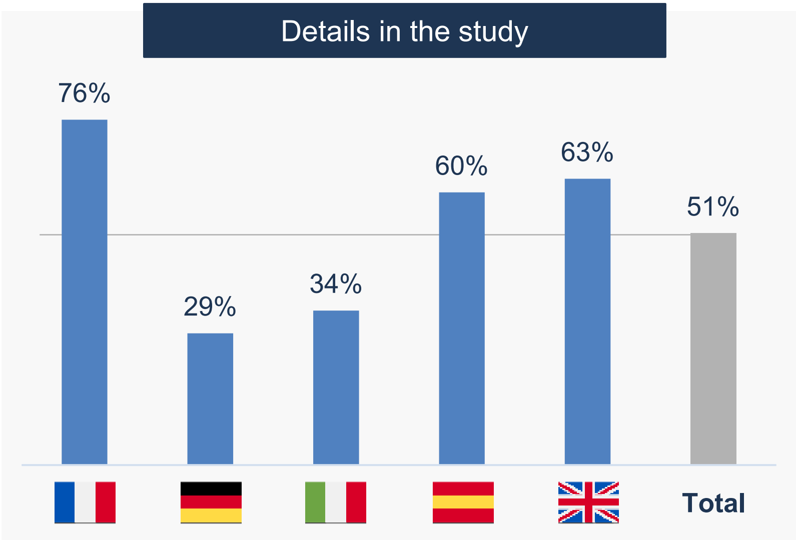
Is there a CO2 limit for your fleet? Total n = 810

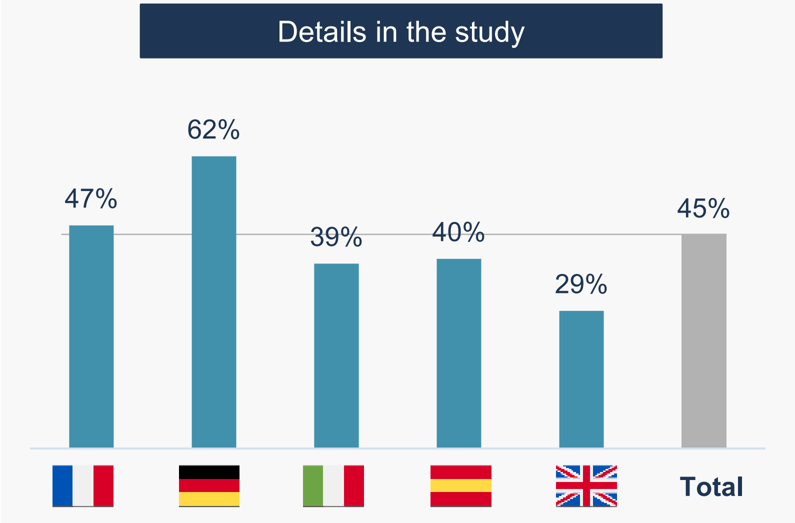
Environmental reasons important for switching to e-mobility in all countries

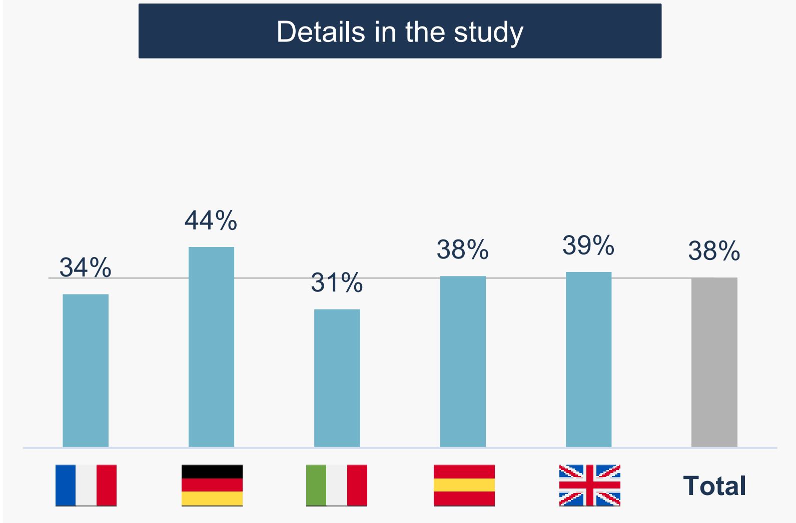
Reasons for alternative drive vehicles in fleets

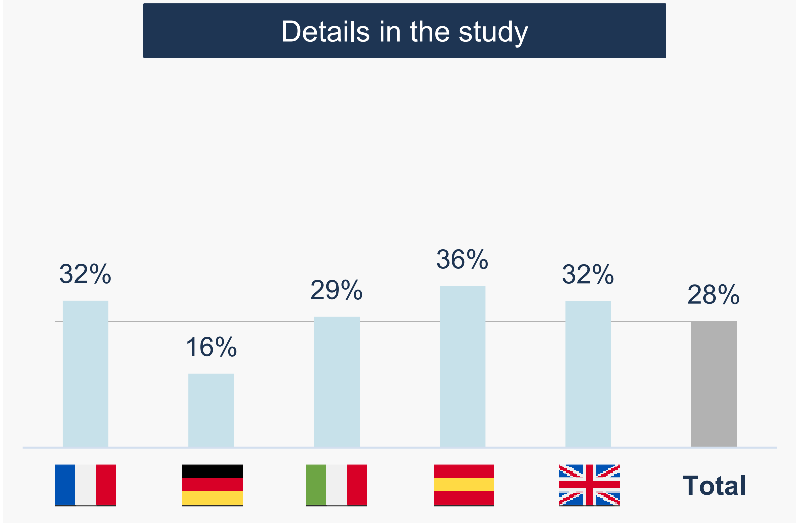






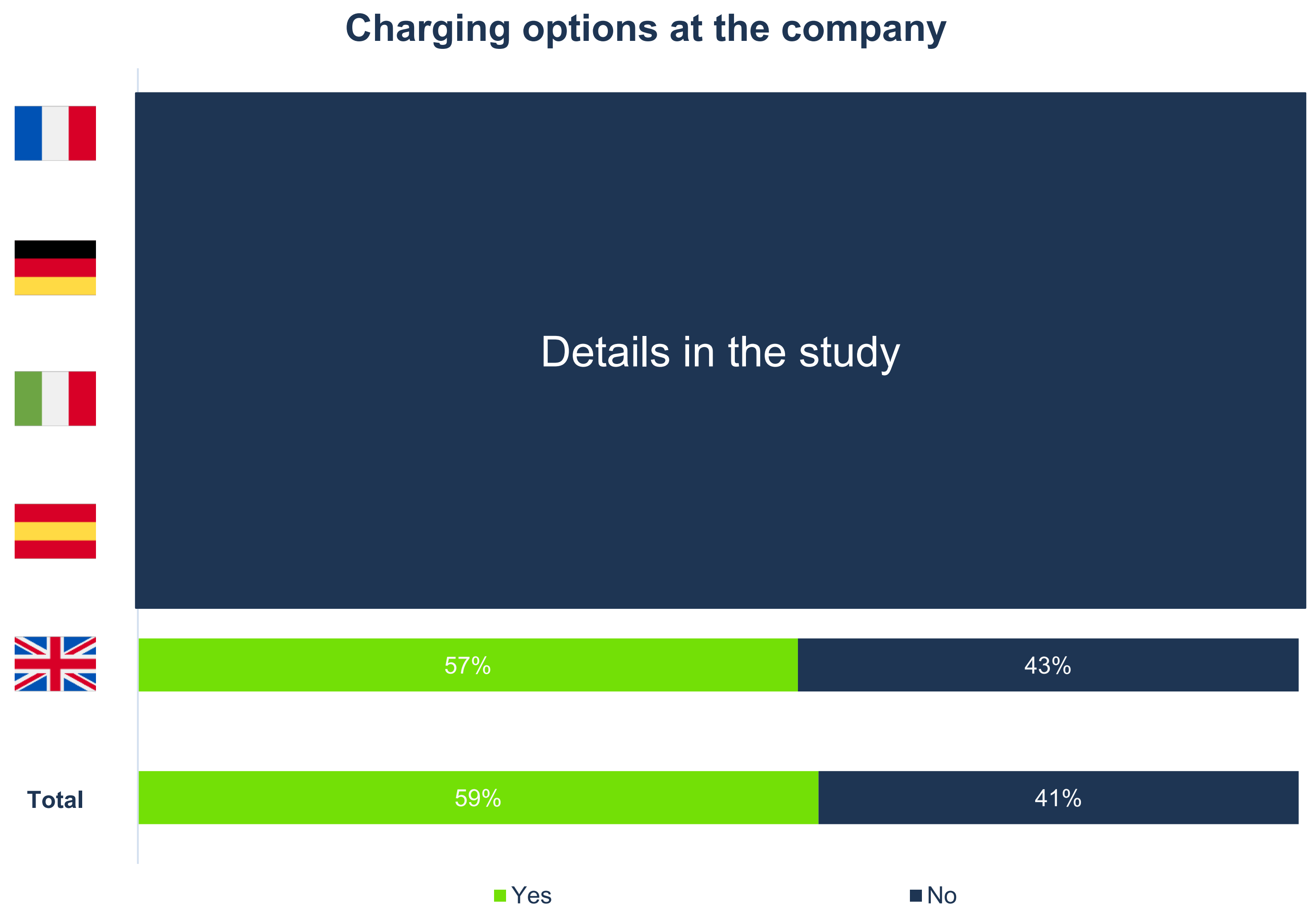






Additional potential for manufacturers and leasing/rental companies

Charging options for e-vehicles at the company

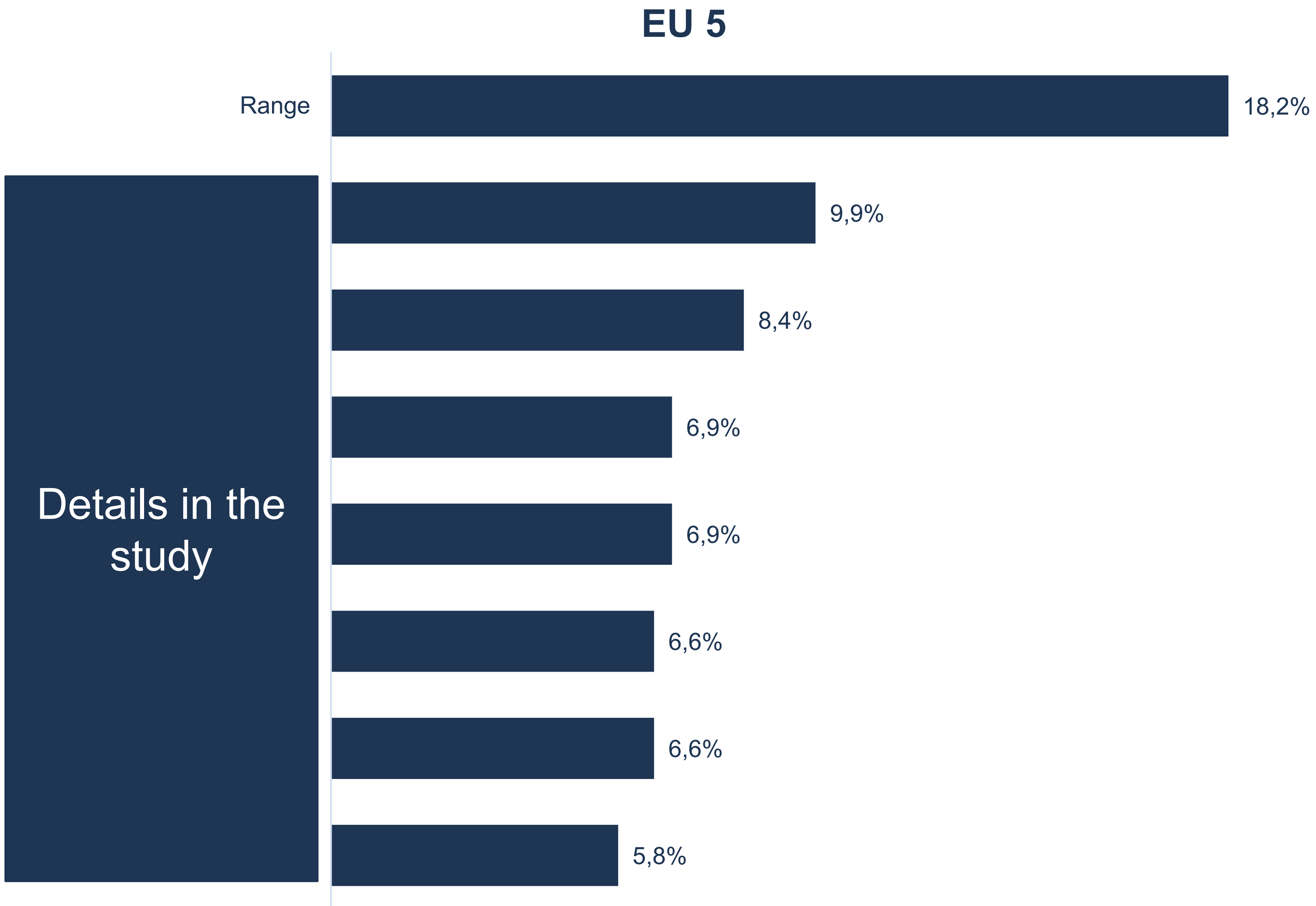


– Generally we see an additional potential for manufacturers and leasing/rental companies. A full-service offer including charging stations (e.g. with a cooperation partner) can help to get a quicker and positive purchase decision from the fleet managers for EV, PHEV or HEV vehicles

Do you have charging options for e-vehicles at your company? Total n = 810

Realistic and objective information about range is needed

What information would fleet managers like from **manufacturers**?



Details in the study

Details in the study

13% UK at charging and infrastructure
„Charging time details and the different options.“

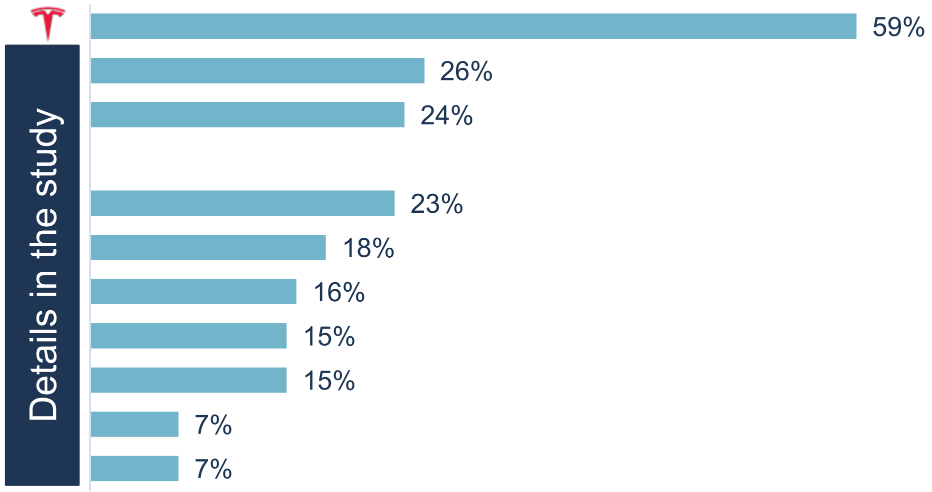
Details in the study

Details in the study

On which topic would you like to have more information from manufacturers? Total n = 274

Which three brands spontaneously come to your mind when you think of e-vehicles?

First brand in mind for e-vehicles

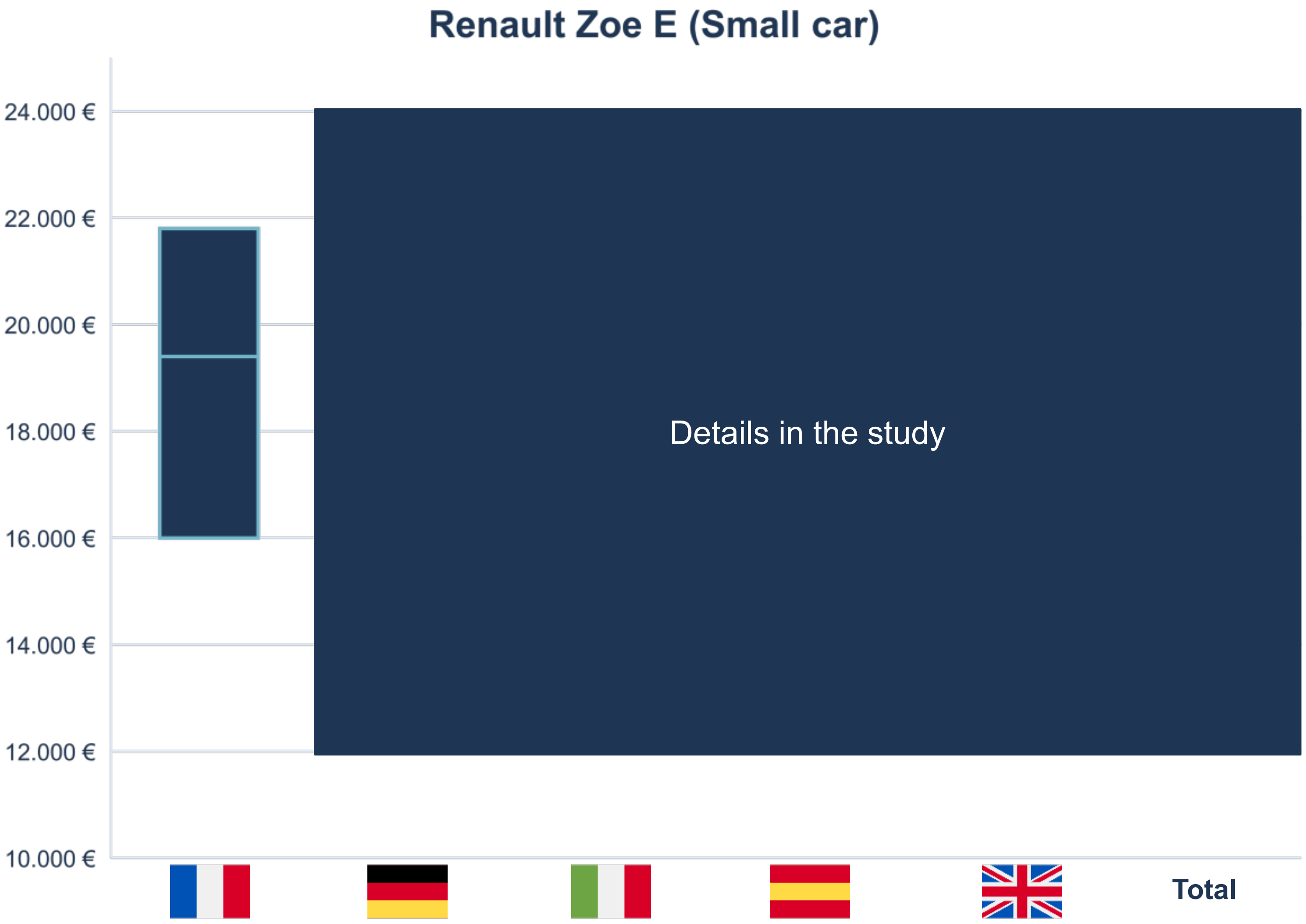


Ranking Overview

Brand						Total
	2	2	1	1	1	1
Details in the study	1	5	9	3	10	2
	4	9	2	2	5	3
	5	4	4	4	3	4
	10	1	10	12	8	5
	14	3	6	7	2	6
	6	6	5	5	7	7
	13	13	7	11	4	8
	9	12	8	10	6	9
	12	7	11	6	9	10
	3	18	12	8	17	11
	11	15	3	15	18	12
	7	16	-	9	11	13
	16	8	14	16	13	14
	8	19	13	13	15	15

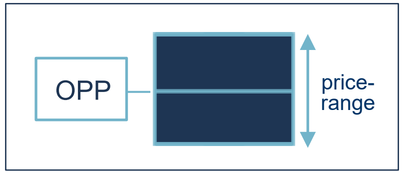
Optimal Price Point for Zoe below 20.000 € in France

Price range and optimal price point for **Renault Zoe E**



Price range:
Within these limits, the price-performance perception is ideal for the customer. A price below the limit would be bad for the brand image, as it would be perceived as "cheap". Above this limit, price acceptance drops significantly.

Optimal price point (OPP):
Price acceptance is highest here and the number of people considering the product in principle is maximum. The point is ideal for maximizing sales volume.



The price points provide information about the fleet managers' willingness to pay. Subsidies in the respective country must still be added here.

To determine the price willingness the price sensitivity measurement (PSM) method was used; Renault Zoe E, total n = 286

E-Mobility Study EU5 : Pricing and order form

Direct online order here

By country (All target groups/modules included)		Price	Availability	Target group/module
☐	France	5.500 €	May 22	Fleet manager, Fueltype forecast
			June 22	User Chooser, Private
☐	Germany	5.500 €	May 22	Fleet manager, Fueltype forecast
			June 22	User Chooser, Private
☐	Italy	5.500 €	May 22	Fleet manager, Fueltype forecast
			June 22	User Chooser, Private
☐	Spain	5.500 €	May 22	Fleet manager, Fueltype forecast
			June 22	User Chooser, Private
☐	UK	5.500 €	May 22	Fleet manager, Fueltype forecast
			June 22	User Chooser, Private

By target group/module (All countries included)		Price	Availability
☐	Fleet manager	6.500 €	May 22
☐	User Chooser	6.500 €	June 22
☐	Private	6.500 €	June 22
☐	Fueltype forecast	6.500 €	June 22

☐	**Full study**	**25.000 €**	**All countries and all target groups/modules**

Order confirmation

Company: ______________________________

Name: ______________________________

E-Mail: ______________________________

Phone: ______________________________

Die E-Mobility Study will be delivered as pdf-Document 25th May (Fleet manager- and Fueltype forecast module) and 15th June (User Chooser- and Private module). All information incl. study content, insights and analysis are for internal use only. Any duplication, distribution (including forwarding to consultants or agencies), public access or processing requires the approval of Dataforce. Our general terms and conditions apply. These are available at https://www.dataforce.de/en/general-terms-and-conditions/. All fees are net costs. VAT is to be added.

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