

Reshaping the way employees move in Europe



Insights to help companies leverage their mobility policies



Introduction

"Corporate mobility is rapidly changing. We see new modes of transport and offerings popping up across European cities almost on a weekly basis. With these changes, we expect our employers to offer us more mobility options, such as: greener and safer ways to get to client meetings, a more flexible commute to work using e-scooters or e-bikes, or a monetary perk to use for our private transport.

From ownership to usership, diesel to electricity, office attendance to remote working, and with on-demand mobility, this past year has contributed to and facilitated many of these changes, shaping mobility trends forever.

How to adapt to a constantly changing mobility landscape? That's what we've tried to answer through a study done in June 2021. We interviewed over 5,000 business travellers and 819 companies in Europe to better understand how they move for business. Hopefully, the study's insights will help you to make smarter decisions regarding your travel management, and will provide key understanding to meet your travellers' expectations in this new era."



Jason Dunderdale, Head of Sales UK
FREE NOW for Business

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Covid-19 has shifted company priorities

Sustainability, ranked **4th** after duty of care, well-being, and budget control, is a top priority in 2021 with respect to travel programming.



Employee well-being is a key factor in attracting and retaining talent

49% of employees
would choose an organisation that protects their health and well-being.



Covid-19 has affected employees' well-being

Supporting employees' well-being is the

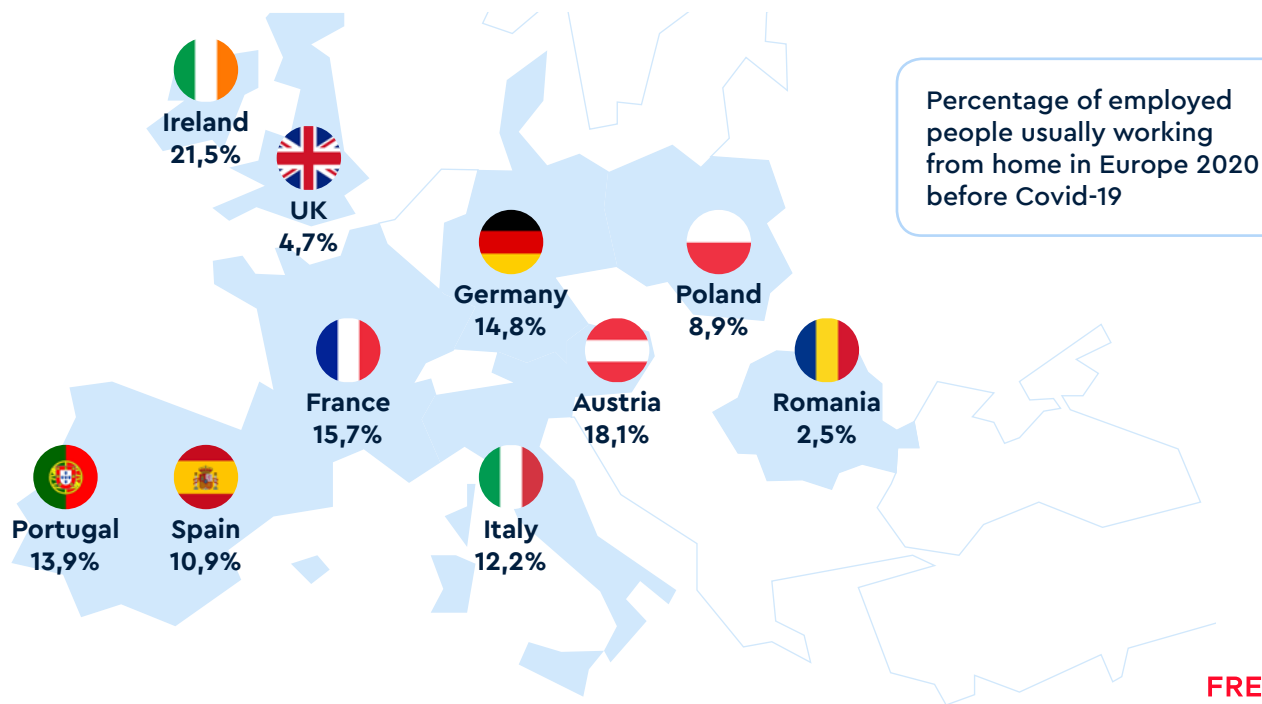
Nº1

priority for executives

(48% of respondents)



Covid-19 has made an impact on travel preferences



Covid-19 has made an impact on travel preferences

38% companies




anticipate a shift from city public transport to private car/taxi as a consequence of Covid-19.

40% of employees



would like to use bikes or e-bikes for their daily commute, while 37% of business travellers would like to use them to go to meetings.

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Companies

To adapt to new ways of moving, especially micromobility, companies need more fleet flexibility

For commuting purposes

65%



of employers provide their employees with a company car

72%



with subsidised public transport

40%



with ride-hailing

46%



with micromobility

47%



with a mobility budget that can be used for business or private trips

Companies

To adapt to the new ways of moving, especially micromobility, companies need more fleet flexibility

45%

of employers

who currently offer company cars to their employees say they would replace them with a mobility budget.



Companies

Greening travel policies is a new priority for companies

46%

of European travel managers
say sustainability is one of the three greatest pain
points with their ground transportation programme.



Companies

Employee satisfaction is a priority and mobility is now part of it

79% of companies
have already integrated traveller well-being into their company policy.



Companies

Employee satisfaction is a priority and mobility is now part of it

Mobility ranked among the

top 5

benefits

and is a well-established employee benefit.



Business Travellers

Commuting time is to be considered when thinking about employees' well-being

Only 1 in 5 business travellers
say they are happy with
their commute.

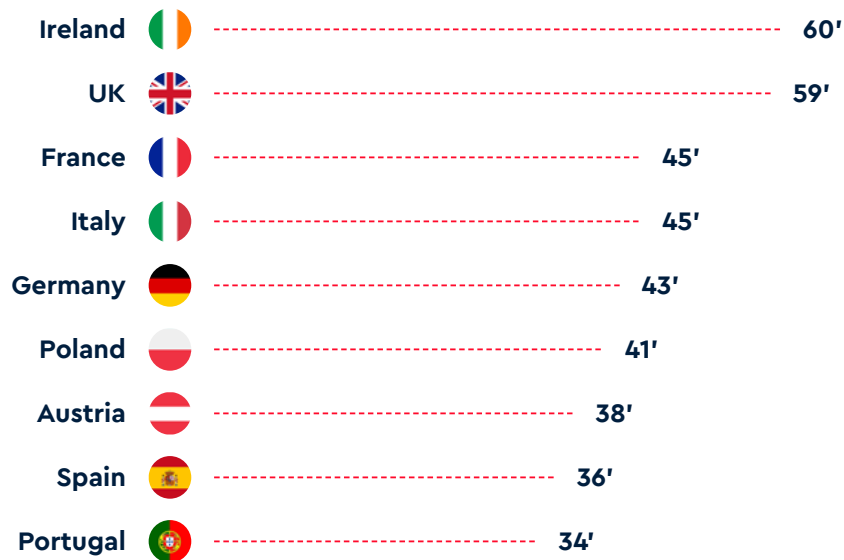


Business Travellers

Commuting time is to be considered when thinking about employees' well-being

39% of Europeans
spend more than

45 minutes
commuting one way,
from door to door.



Business Travellers

The pandemic and remote-working policies did not resolve commuting challenges

In this period, **75%** of the workers surveyed need to move around for business purposes:



79%

of them for
commuting



39%

of them for
meetings



30%

of them for
events



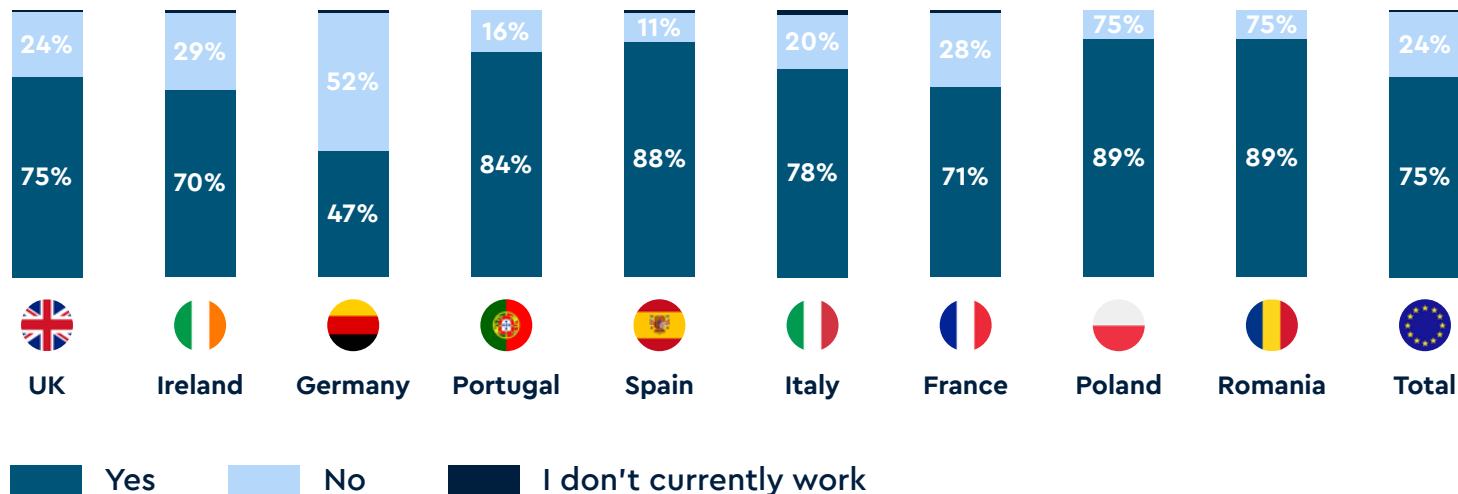
19%

of them for
travel abroad

Business Travellers

Business travellers still get around for work

% of people who get around for work



Business Travellers

Care for safety has increased and is a priority

With respect to commuting

52%



of business travellers
say that they choose
the safest mobility option

51%




the easiest

48%



the fastest

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Definition of mobility budget

With a mobility budget, employers give employees a monthly mobility allowance that they can use for various types of transport (taxi, carsharing, scooter, moped, e-bikes...). All these will be bookable through one app and are directly invoiced to the company account. This is a mobility perk that

employers can offer employees solely for their private travel (outside of work, including commuting). On some occasions, this perk would be an extra amount added to an employee's salary, while on other occasions employees can top up the amount given by the employer with a salary sacrifice.

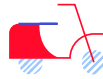
A solution to replace company cars

63% of business travellers interviewed use their private or company car to commute, but among them...



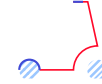
31%

would like to use
bikes/e-bikes
to commute



9%

would like to use
mopeds

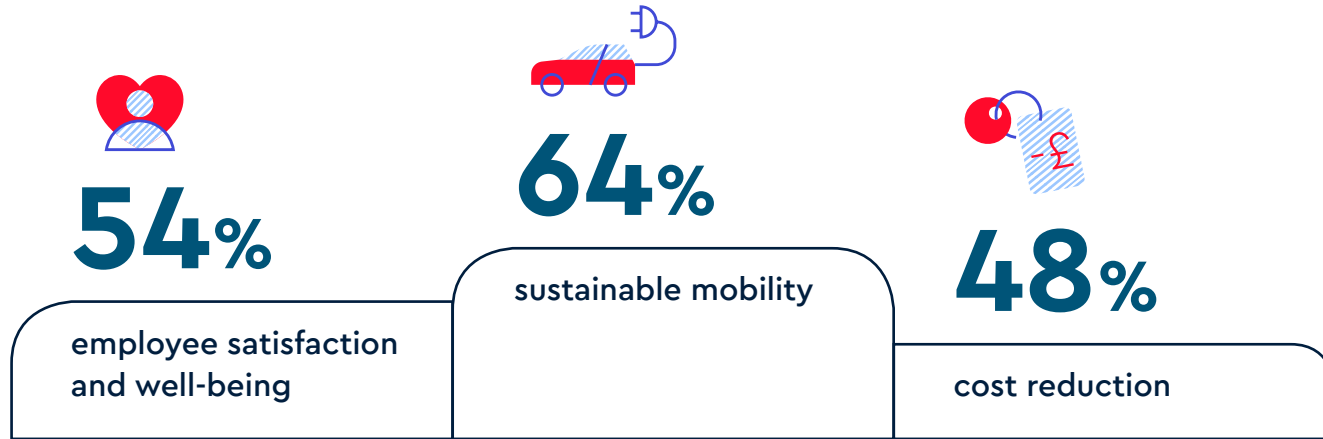


6%

would like to use
scooters/
e-scooters

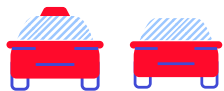
A solution for employees

For companies, the top 3 factors in support of a mobility budget are



A solution to address sustainability and flexibility goals, using micromobility

Among those who like the idea of a mobility budget



36%

would like their employer to include taxi/cab/ride-hailing in the mobility budget



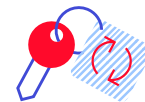
37%

would like their employer to include e-bikes



21%

would like their employer to include scooters/e-scooters



37%

would like their employer to include car-sharing

The appeal and adoption of a mobility budget within companies

65% of companies



find the idea of a mobility budget appealing and would like their company to make this offer available.

For

77% of employers



a mobility budget could totally replace their current corporate mobility offering.

Roadblocks to a mobility budget

The top 3 concerns regarding a **mobility budget** are

47%



cost

34%



taxation

33%



insurance

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1

More than ever, mobility affects employees' well-being, and it's important to have a strong strategy to meet their mobility expectations

2

Green mobility is a priority for both employees and companies, and new travel policies should reflect this

3

Micromobility is a real need and should be better addressed in travel policies

4

More flexible mobility options should be considered as potential alternatives to company cars

5

A mobility budget is a solution that can answer employees' and companies' new needs

To meet all these challenges,
contact our team of mobility experts today!

FREE NOW for Business is the multi-mobility solution for companies and their employees, in 10 countries and 100 cities in Europe.

Today, FREE NOW for Business has 30,000 client companies all across Europe.

Join us!

FREENOW ✓
FOR BUSINESS

