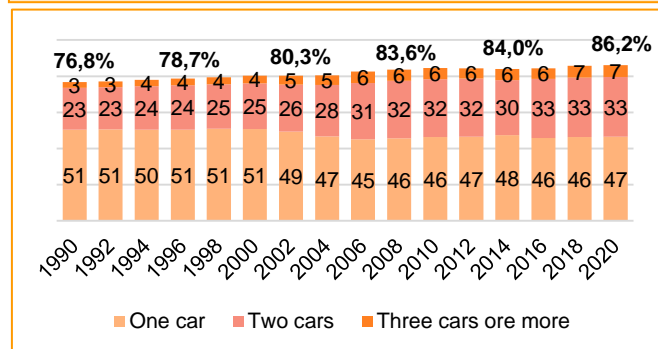


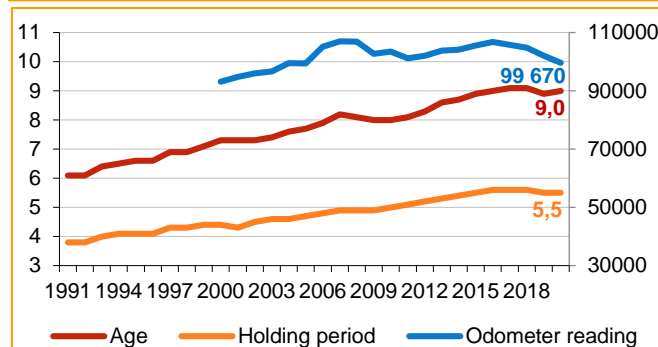
## Household car fleet

In 2020, the household motorization rate is the highest ever recorded. The Covid-19 pandemic has affected certain uses of vehicles.

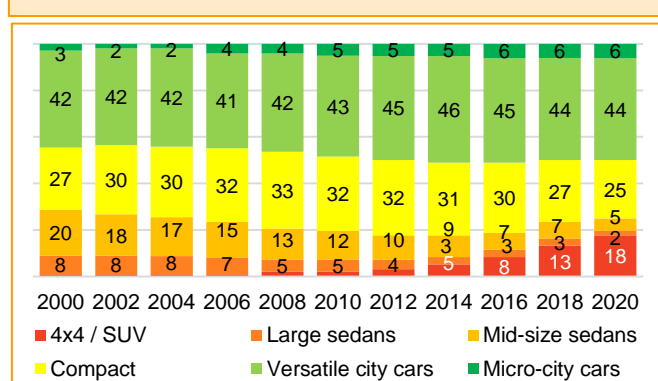
Share of households (%) owning one or more vehicles by year



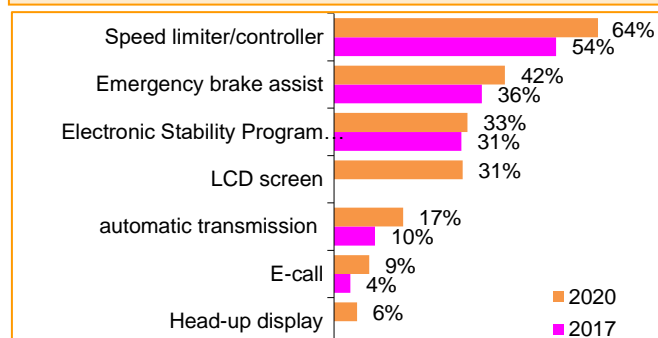
Change in age, length of ownership (years old), and average odometer reading of the household car fleet



Weight of range levels in the PV fleet (%)



Equipment rate of the fleet by system according to the year



Source: Vehicle fleet survey, Kantar, 2021.

Vehicle Fleet survey has been the benchmark annual study for more than 30 years old on the car fleet of French households. Kantar thus carried out, between February and April 2021, two questionnaires ("Your home and the car" and "You and the car") with 10,000 households representative of the French population.

### Household motorization rate

In 2020, the household motorization rate is estimated at 86.2 %, the highest ever recorded. This figure has been on the rise since 2015 and especially driven by multi-motorized households (owning at least 2 cars), up 2 points over the same period.

Car ownership peaks in households with the highest incomes. In 2020, the rate is 94 % in households with an annual income of more than €38,000 per year, compared to 59 % in households for which it is less than €7,500.

The smaller the size of the urban area, the higher the motorization rate. Multi-motorisation in particular goes from simple (31 %) to double (60 %) between rural areas and towns of more than 100,000 inhabitants.

For non-motorized households, the reasons mentioned remain essentially the lack of a driving license and the absence of real need. The rate of non-motorized households drops for the fifth consecutive year to reach 13.8 %.

### Vehicle characteristics

Since 2015, the average age of the park has stabilized around 9 years old. One out of 3 vehicle is over 10 years old, 2 out of 3 are over 5 years old. The average holding period remains stable (5.5 years old) but the average odometer reading (99,670 km) has been on a downward trend since 2016.

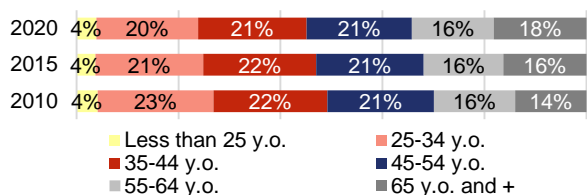
Used vehicles represent 59 % of the car fleet and 69 % of cars purchased in 2020.

Among the range levels, the share of the 4x4 SUV (Sport Utility Vehicle) segment continued to increase in 2020 (+ 2 points). Its weight in the fleet has increased from 2 % to 18 % in 10 years old. This increase has led to a significant drop in the weight of the M2 (Medium Sedans), H (Large Sedans) and now M1 (Compact).

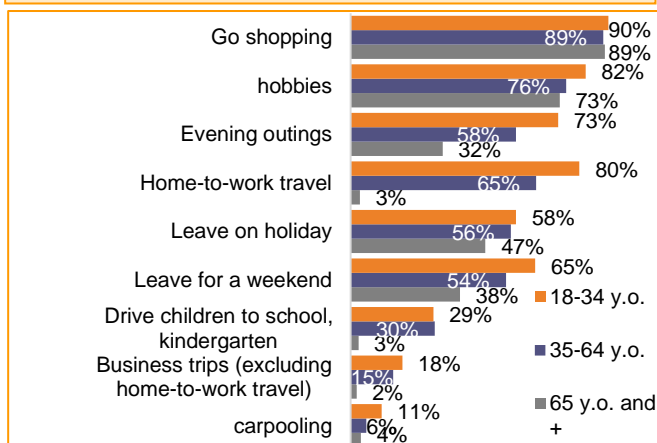
Since 2017, the share of vehicles equipped with automatic gearboxes has gained 7 points, and that of vehicles equipped with e-Call 5 points to now represent 9 % of the fleet. Among the equipment surveyed, the speed limiter/regulator has experienced the greatest increase in 4 years old (+ 10 points, 64 % of vehicles).

French brands remain quite largely in the majority in the French car fleet (62 %), despite a drop of 5 points in 10 years old. Electric or hybrid vehicles represent 4 % of the fleet.

### Breakdown of kilometres travelled by vehicles by age of main user and year

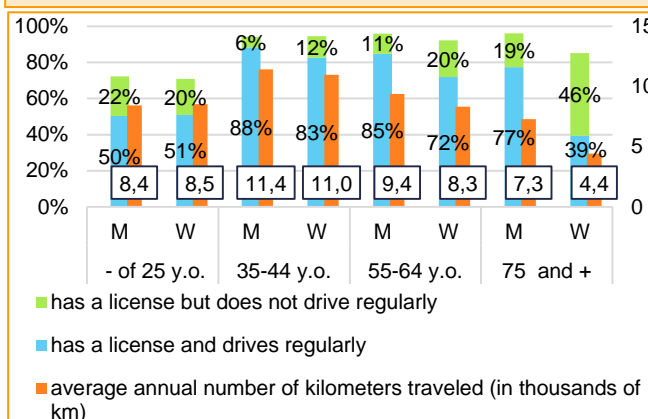


### Reasons for use in 2020 by age group (in % of respondents\*)

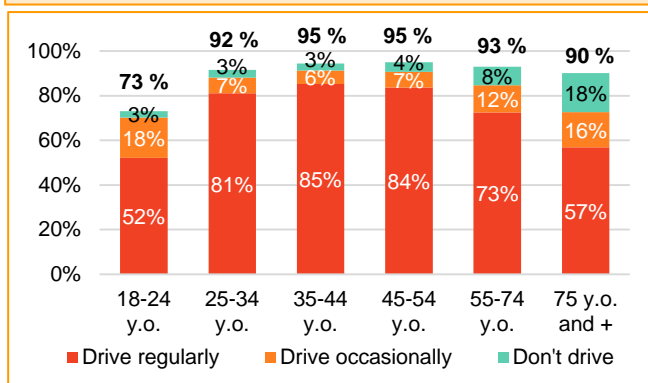


\*Question: "Is this car used for?" »

### Percentage of license holders driving regularly or not; average annual mileage travelled by vehicles - by gender (M/F) and age of the main user



### Breakdown by age group of individuals with driving licenses whom...



Source: Vehicle fleet survey, Kantar, 2021.

## Usage behaviours

The average annual mileage per vehicle drops in 2020 due to the Covid-19 pandemic. Vehicles less than 10 years old travel more than 2,000 km more per year than those more than 10 years old.

The share of vehicles being used daily remains at 35 %, compared to 42 % before the pandemic. Most households make a single daily round trip (34 %) for the home-to-work/study travel. These are trips of 34 km per trip on average, i.e. a duration of 36 minutes.

Vehicles of main users (MU) aged 25 to 54 account for 61 % of kilometres travelled, down since 2010 (-5 points). This decline is mainly attributable to the age group of 65 years and over, falling from 14 to 18 % over the same period. MU vehicles less than 25 years old represent 4 % of kilometres travelled.

The year 2020 does not show any major differences in the reasons for using vehicles compared to previous years. The main motives are still shopping (89 %) and leisure (76 %).

People aged 65 and over are less represented in most travel reasons. The main differences are logically found in commuting or driving children to school, but also in evening outings (73 % of 18-34 years old compared to 32 % of 65 years old and over).

## User profile

The share of female main users (MU) of vehicles is 44 % (knowing that women represent 52 % of the population aged 18 and over); the kilometres travelled by these vehicles represent only 42 % of the total. The proportion of MU women has increased by 2.3 points since 2010.

More than a quarter of main users are aged 65 or over, while vehicles in this category represent only 18 % of kilometres travelled.

Occasional drivers use 39 % of vehicles but nearly 3 out of 4 achieve less than a quarter of the vehicle's total mileage.

A quarter of secondary users are under 35 and 53 % are women.

Possession of a driving license is almost universal among 35-54 years old (95 %). In this age group, only 3 to 4 % do not drive. 73 % of 18-24 years old have a driving license but only 52 % drive regularly. The highest age groups have a high rate of non-driving license holders, rising to 18 % among those aged 75 and over.

Permit holders represent 10 points more in rural areas than in urban areas of more than 100,000 inhabitants (93 % against 83 %).