



RENAULT NISSAN MITSUBISHI

COMMUNIQUÉ DE PRESSE

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The Renault-Nissan-Mitsubishi LCV Business survey

Included below are key results from the Renault-Nissan-Mitsubishi LCV Business survey, specific to 500 small businesses owners or decision makers surveyed in France:

Small business leaders in France are divided on the future of autonomous technologies in their operations:

- 21% of respondents from France believe fleets will be fully autonomous within the next 10 years, while 20% can see this happening within the next 20 years
- Meanwhile, 19% of French respondents do not ever see this happening compared to just 1% of Chinese small business leaders
- However, it seems more likely to French small business leaders that fleets could become fully electric within the next ten years (33%)
- The government was voted as the leading entity (41%) considered responsible for creating greater access to autonomous vehicles for small businesses in France, followed by car manufacturers (34%). In other surveyed markets (46% globally), automakers (car manufacturers) are considered primarily responsible

Rising e-commerce is not threatening small businesses in the same way that changing regulations are:

- Keeping up with regulations was voted the biggest challenge logistically for small businesses in France (24%), followed by changing customer expectations for delivery times (13%) and urban traffic and congestion (12%)
- The growth of e-commerce and the rising demand for overall deliveries was only voted by 11% of French respondents as their greatest challenge logistically. This demonstrates a stark difference from the level of concern in China (37%), but is similar to levels seen in Japan (7%) and the UK (9%)
- Supporting this, 54% of French respondents are confident their businesses are well set up to tackle the demands of e-commerce, similar to the UK and US (59%), but high in comparison to China (15%)
- Smarter technology was voted by 21% of French small business leaders as the leading requirement to better prepare for e-commerce demands and improve delivery efficiencies, followed by the need for more vehicles (12%)

French small business leaders are motivated by business efficiency and cost-savings, but also have a sustainable mindset that may not be translating to their choice of technologies:

- When adopting new technologies within their fleets, 29% of French respondents say that business efficiency is their main motivation
- Meanwhile, over a quarter (26%) are driven to use new technologies for cost-saving purposes
- 16% of French respondents adopt new technologies to become more sustainable, compared to 31% in China
- Despite this, more broadly, 41% of French small business leaders feel environmental sustainability is fairly important for their company's logistics, far higher than in the US and Japan (25% each), while 26% believe it to be very important

In France, the ability to embrace technology could be the key to future success, but there is skepticism over the use of advanced technologies such as drones:

- Over a fifth (22%) of French respondents believe that improved connectivity, followed by autonomous technologies (15%) will be most key to future business success, from a logistics perspective
- Only 2% of French respondents believe that drone deliveries will be crucial for the future, compared to 19% in China

The term “business leaders” refers to the sample of 500 small business owners, or decision makers in small businesses, surveyed in France.

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