

MERCER TALENT ALL ACCESS®

2019

CAR BENEFIT POLICIES & ALTERNATE TRANSPORTATION

SAMPLE

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4 **MERCER'S GLOBAL PUBLICATIONS**

5 **INTRODUCTION**

7 Report Structure

33 **ABOUT THIS REPORT**

33 Methodology

37 **ABOUT MERCER**

23 **AMERICAS**

24 Argentina

41 Bolivia

43 Brazil

60 Canada

77 Chile

92 Colombia

109 Costa Rica

111 Dominican Republic

113 Ecuador

128 El Salvador

130 Guatemala

132 Honduras

134 Mexico

151 Nicaragua

153 Panama

155 Peru

170 Puerto Rico

172 United States

189 Uruguay

191 Venezuela

193 **ASIA PACIFIC**

194 Australia

211 Bangladesh

213 China-Beijing

230 China-Shanghai

247 Hong Kong

262 India

279 Indonesia

296 Japan

298 Malaysia

315 New Zealand

328 Pakistan

330 Philippines

347 Singapore

364 South Korea

381 Sri Lanka

383 Taiwan

395 Thailand

412 Vietnam

427	CENTRAL AND EASTERN EUROPE
428	Azerbaijan
430	Belarus
432	Bulgaria
447	Croatia
449	Czech Republic
464	Estonia
466	Georgia
468	Hungary
483	Kazakhstan
498	Latvia
500	Lithuania
502	Macedonia
504	Moldova
506	Poland
523	Romania
540	Russia
557	Serbia
559	Slovakia

611	MIDDLE EAST AND AFRICA
612	Algeria
614	Egypt
629	Ivory Coast
631	Lebanon
633	Morocco
646	Qatar
648	Saudi Arabia
660	Tunisia
662	United Arab Emirates

679	WESTERN EUROPE
680	Austria
695	Belgium
712	Denmark
727	Finland
742	France
759	Germany
776	Greece
791	Ireland
806	Italy
821	Netherlands
838	Norway
853	Portugal
870	Spain
887	Sweden
902	Switzerland
917	United Kingdom

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HEALTH & BENEFITS



Car Benefit Policies & Alternate Transportation



Car Benefit Policies — Global Industry Findings



Global Parental Leave



Global Parental Leave Industry Scorecard



LGBT Benefits Around the World*



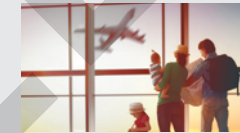
Severance Pay Policies Around the World



Severance Pay Policies Industry Scorecard



Vacation and Other Leave Policies Around the World



Vacation and Other Leave Industry Scorecard



Worldwide Benefit & Employment Guidelines

WORKFORCE & CAREERS



Global Compensation Planning



Global Compensation Planning 20 Year Look Back*



Global Pay Summary



Incentives Around the World



New Graduate Starting Salaries



Salary Movement Snapshot**



Short-term Incentives Around the World



Short-term Incentive Trends — A 10 Year Review*



The Design of Work



Workforce Turnover Around the World

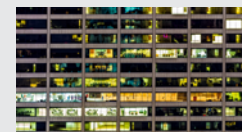
HANDBOOKS & GUIDES



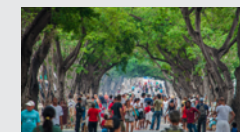
Compensation Handbook*



Global Mobility Handbook*



HR Atlas*



HR Guide to Doing Business*



HR Management Terms*

* Exclusive to Talent All Access® subscribers

** Not included in Talent All Access®

INTRODUCTION

Few employee benefits are as familiar or widely-recognized as car benefits. A long-running tradition for high-ranking executives, car benefits have been a staple of generous employee benefit programs and a token of success within a firm for decades. However, as companies have curtailed some of their more superfluous expenses and shareholder oversight increases, car benefit policies have become more pragmatic. Today, car benefit policies remain common around the world, but companies continue to rethink the structure of these programs to ensure that both the employee and employer are best served.

THE BENEFITS OF A COMPANY CAR

Different companies can have different reasons for adopting a car benefit program. For some, providing employees with a car is simply the cost of doing business; those employees that must travel long distances in a sales-based role may need a car to fulfill their job function. Other employers, whose staff has frequent contact with their clients outside of the office, may wish to control their company's public image by furnishing those employees with a vehicle that reflects the company values, whether that be a luxury vehicle or a more understated option. Finally, many companies may see a car benefit policy — either in the form of a company-provided vehicle or a car allowance — as a key to their employment brand and a major perquisite meant to attract top talent. Indeed, car benefit policies can provide value to a company in a number of ways.

NOT WHAT THEY USED TO BE

That said, instituting a car benefit program is no longer as simple as it once was, and gone are the days of offering a single luxury vehicle to high-ranking executives for unlimited personal and professional use. Today, companies must determine the scope and coverage of a car benefit policy, from the types of employees that are eligible, to the types of related expenses that will be covered by the company. Is it better to directly provide a car for your employees' use, or should you provide a car allowance for them to allocate at their own discretion? Companies must bear in mind that solutions may vary based on an employee's career level or geographical location, and, therefore, may need to implement a tiered policy. To further complicate matters, the introduction of tax policies meant to curb emissions means that some companies should consider the merits of a green car benefit policy or alternative transportation. When HR and business managers also must account for the pros and cons of a company-leased versus company-owned fleet, vehicle replacement thresholds, and specific makes and models to offer employees, a relatively simple decision to offer car benefits can lead to a fairly complicated HR problem.

INTRODUCTION

THINK IT OVER

Before instituting a car benefit policy, there are a number of factors for every employer to consider. Here are a few:

- ▶ How should my company car benefit program promote greener, environmentally-friendly travel solutions?
- ▶ Should we provide vehicles, allowances, or both?
- ▶ Which levels of employees should be eligible for a car benefit?
- ▶ If we opt for providing vehicles, should my company purchase or lease the cars offered to employees under a car benefit program?
- ▶ For what purposes should we allow our employees to use their company-provided car?
- ▶ Which, if any, miscellaneous expenses associated with owning and operating a vehicle should my car benefit program cover?

REPORT STRUCTURE

The 2019 **Car Benefit Policies & Alternate Transportation** publication provides human resources (HR) and business managers with up-to-date information on car benefit policies. Presenting a consistent set of global data, this publication contains detailed information on a variety of company car benefit programs, allowing readers to gain insight into a host of markets around the world. Going beyond prevalence and eligibility information, this report is a one-stop-shop for any HR or business manager looking to devise, alter, or otherwise assess their company's employee car benefit policy. This publication includes data from 85 markets and benefit details for five career levels commonly found in most organizations.

The report includes the following sections:

SUMMARY OF KEY FINDINGS

This section serves as an executive summary for those looking for Mercer's insights and observations. This section is optimal for anyone looking for regional variations in policies, global car benefit trends, and other notable takeaways from the data collected in Mercer's global survey.

REGIONAL RESULTS

Each regional section provides critical data to those looking to learn more about specific countries or markets. The regional sections are presented in geographical groupings, each of which contains market-specific information.

CAR BENEFIT ELIGIBILITY AND COST

- ▶ Eligibility by employee level
- ▶ Typical vehicle make and model
- ▶ Vehicle purchase price, monthly lease amount, monthly allowance

CAR BENEFIT POLICIES

- ▶ Eligibility criteria
- ▶ Green policies
- ▶ Alternate transportation benefits
- ▶ Company-owned vehicle policies
- ▶ Company-leased vehicle policies
- ▶ Car allowance policies

ABOUT THIS REPORT

This section delineates the methods of data gathering and cleaning used for the report and lists key definitions. It is composed of the following subsections:

- ▶ **Methodology** includes data sources used to compile this report, currency conversion rates, and other details on calculations and assumptions.
- ▶ **Glossary** provides definitions for many of the terms used throughout this report, as well as other HR-related terms.

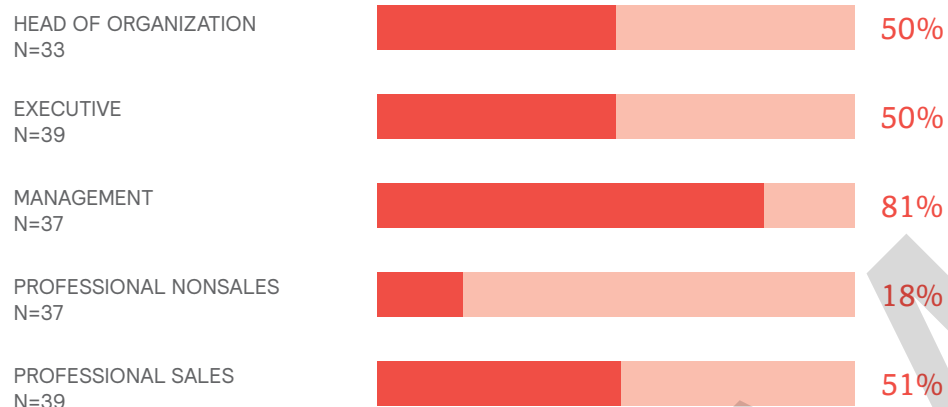


REGION

MARKET

56% of companies offer a car benefit

CAR BENEFIT ELIGIBILITY BY EMPLOYEE LEVEL



TYPICAL MAKE AND MODEL PROVIDED

CAREER LEVELS	MAKE AND MODEL
HEAD OF ORGANIZATION	Mercedes E-Class, BMW 5 Series
EXECUTIVE	BMW X3, BMW 5 Series
MANAGEMENT	Skoda Octavia, Volkswagen Jetta, BMW 3 Series
PROFESSIONAL NONSALES	Toyota Corolla, Nissan Sunny, Renault Logan
PROFESSIONAL SALES	Kia Cerato

VEHICLE PURCHASE PRICE

	LOCAL CURRENCY	USD	
HEAD OF ORGANIZATION	100,000	100,000	N= 20
EXECUTIVE	80,000	80,000	N= 20
MANAGEMENT	80,000	80,000	N= 20
PROFESSIONAL NONSALES	50,000	50,000	N= 20
PROFESSIONAL SALES	50,000	50,000	N= 20

MONTHLY LEASE AMOUNT

	LOCAL CURRENCY	USD	
HEAD OF ORGANIZATION	100,000	100,000	N= 20
EXECUTIVE	80,000	80,000	N= 20
MANAGEMENT	80,000	80,000	N= 20
PROFESSIONAL NONSALES	50,000	50,000	N= 20
PROFESSIONAL SALES	50,000	50,000	N= 20

MONTHLY ALLOWANCE

	LOCAL CURRENCY	USD	
HEAD OF ORGANIZATION	100,000	100,000	N= 20
EXECUTIVE	80,000	80,000	N= 20
MANAGEMENT	80,000	80,000	N= 20
PROFESSIONAL NONSALES	50,000	50,000	N= 20
PROFESSIONAL SALES	50,000	50,000	N= 20

Source: Mercer's 2018 Total Remuneration Survey

MARKET

ELIGIBILITY OVERVIEW

TRANSPORTATION BENEFITS OFFERED BY RESPONDENTS



N=100

56% of companies offer a car benefit

CAR BENEFIT ELIGIBILITY BY EMPLOYEE LEVEL



N=39

TRANSPORTATION BENEFIT ELIGIBILITY BY EMPLOYEE LEVEL

	HEAD OF ORGANIZATION	EXECUTIVE	MANAGEMENT	PROFESSIONAL NONSALES	PROFESSIONAL SALES
VEHICLE	35%	35%	35%	35%	35%
COMPANY-OWNED	42%	42%	42%	42%	42%
COMPANY-LEASED	51%	51%	51%	51%	51%
CAR ALLOWANCE	5%	5%	5%	5%	5%
ALTERNATE BENEFIT	15%	15%	15%	15%	15%
PERSONAL CAR AND DRIVER	23%	23%	23%	23%	23%
PARKING SUBSIDIES	67%	67%	67%	67%	67%
PUBLIC TRANSPORTATION SUBSIDIES	90%	90%	90%	90%	90%
WALKING/CYCLING ALLOWANCE	37%	37%	37%	37%	37%

COUNTRY

CAR BENEFIT OVERVIEW

TYPICAL MAKE AND MODEL PROVIDED

CAREER LEVELS	MAKE AND MODEL
HEAD OF ORGANIZATION	Mercedes E-Class, BMW 5 Series
EXECUTIVE	BMW X3, BMW 5 Series
MANAGEMENT	Skoda Octavia, Volkswagen Jetta, BMW 3 Series
PROFESSIONAL NONSALES	Toyota Corolla, Nissan Sunny, Renault Logan
PROFESSIONAL SALES	Kia Cerato

VEHICLE PURCHASE PRICE

	HEAD OF ORGANIZATION	EXECUTIVE	MANAGEMENT	PROFESSIONAL NONSALES	PROFESSIONAL SALES
LOCAL CURRENCY	100,000	80,000	70,000	50,000	50,000
USD	100,000	80,000	70,000	50,000	50,000
N=	20	20	20	20	20

MONTHLY LEASE AMOUNT

	HEAD OF ORGANIZATION	EXECUTIVE	MANAGEMENT	PROFESSIONAL NONSALES	PROFESSIONAL SALES
LOCAL CURRENCY	100,000	80,000	70,000	50,000	50,000
USD	100,000	80,000	70,000	50,000	50,000
N=	20	20	20	20	20

MONTHLY CAR ALLOWANCE

	HEAD OF ORGANIZATION	EXECUTIVE	MANAGEMENT	PROFESSIONAL NONSALES	PROFESSIONAL SALES
LOCAL CURRENCY	100,000	80,000	70,000	50,000	50,000
USD	100,000	80,000	70,000	50,000	50,000
N=	20	20	20	20	20

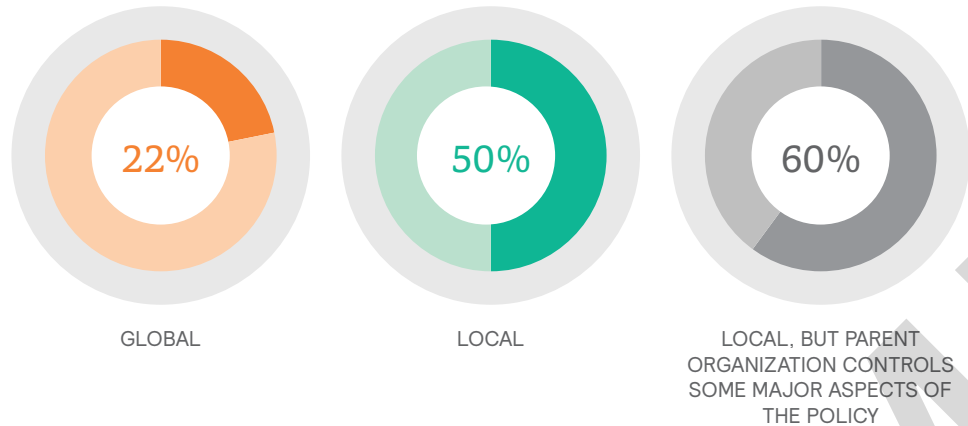
Source: Mercer's 2018 Total Remuneration Survey

COUNTRY



CAR BENEFIT POLICIES

TYPE OF CAR BENEFIT POLICY



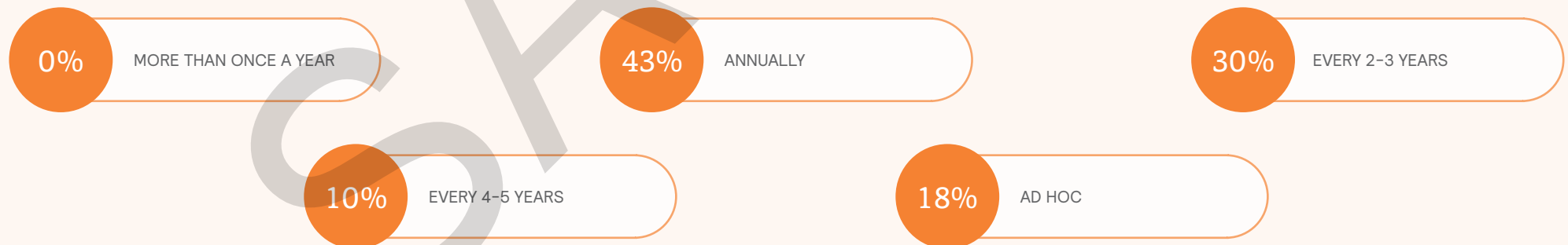
N=40

DEPARTMENT RESPONSIBLE FOR CAR BENEFIT POLICY DESIGN



N=40

FREQUENCY OF CAR BENEFIT POLICY REVIEW

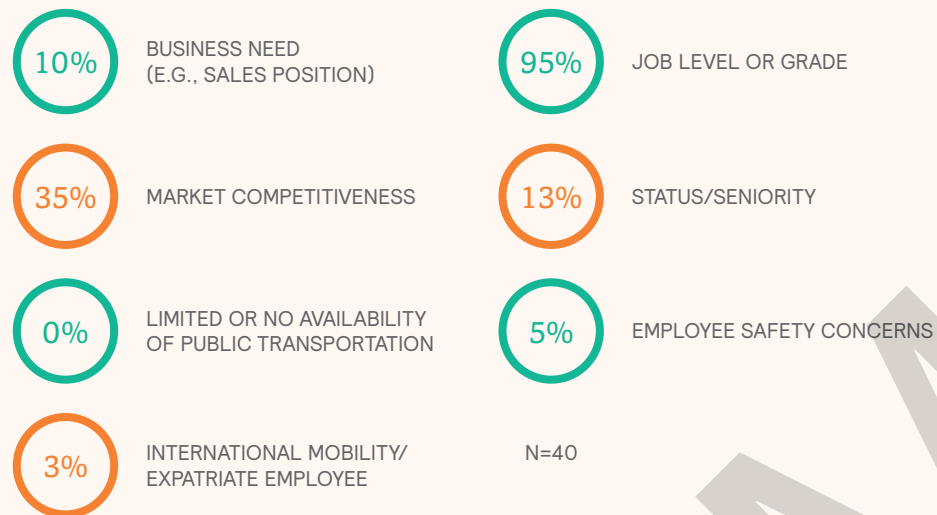


N=40

COUNTRY

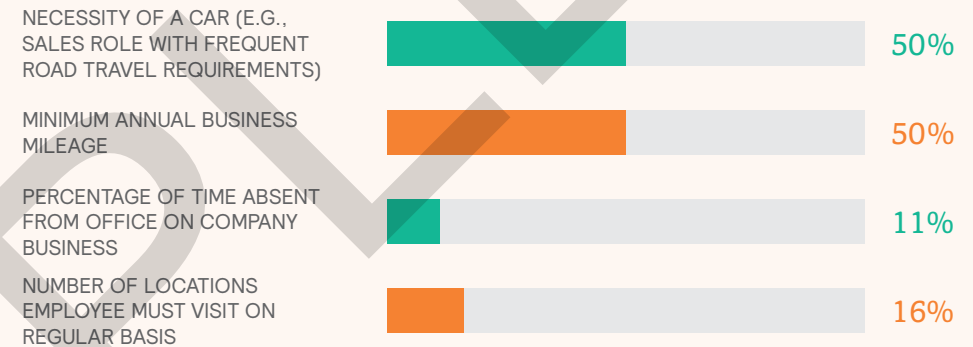
BENEFIT ELIGIBILITY CRITERIA

CRITERIA USED FOR DETERMINING EMPLOYEE ELIGIBILITY



Note: More than one response was permitted; percentages may sum more than 100%.

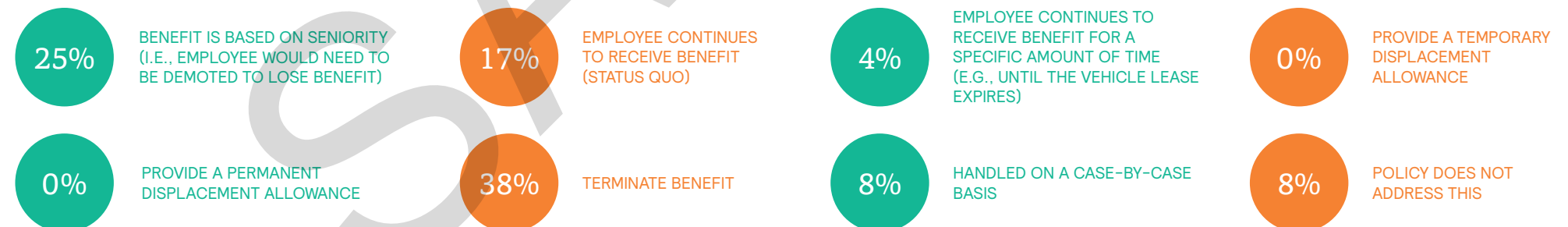
FACTORS CONSIDERED IN DETERMINING BUSINESS NEED FOR CAR BENEFIT



N=19

Note: More than one response was permitted; percentages may sum more than 100%.

POLICY FOR EMPLOYEES THAT TRANSITION FROM A CAR BENEFIT-ELIGIBLE POSITION TO NONELIGIBLE POSITION

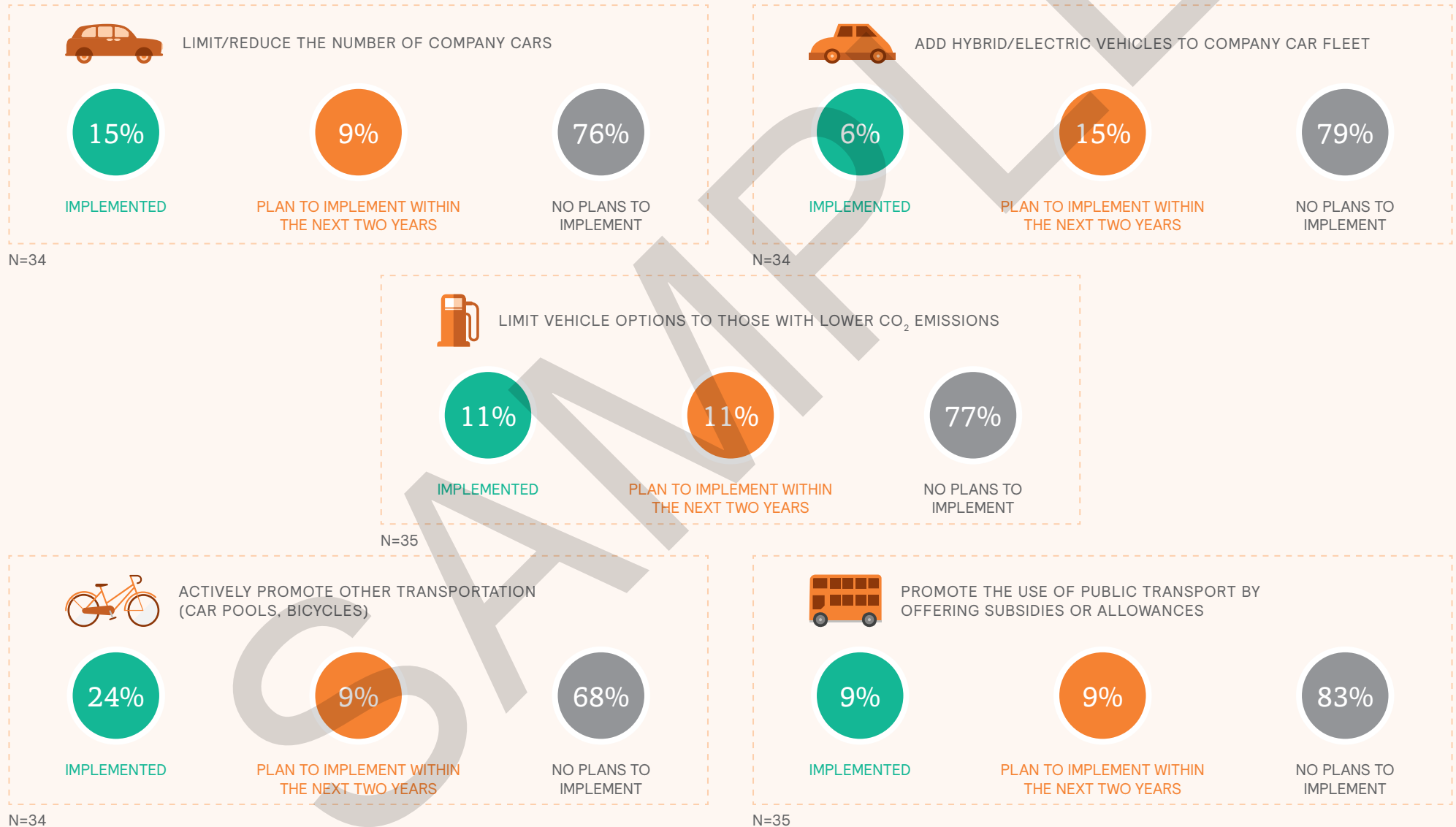


N=24

COUNTRY

GREEN POLICIES

STEPS TAKEN TOWARD A GREENER CAR BENEFIT PROGRAM

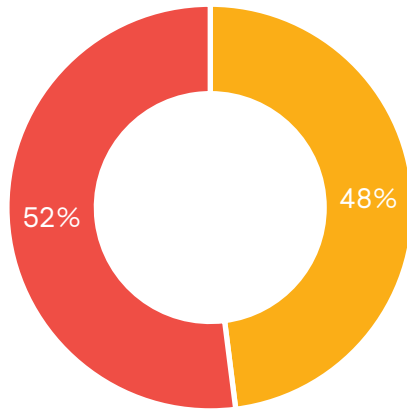


COUNTRY



COMPANY-OWNED VEHICLE POLICIES

COMPANY OWNS VEHICLES FOR CAR BENEFIT PROGRAM



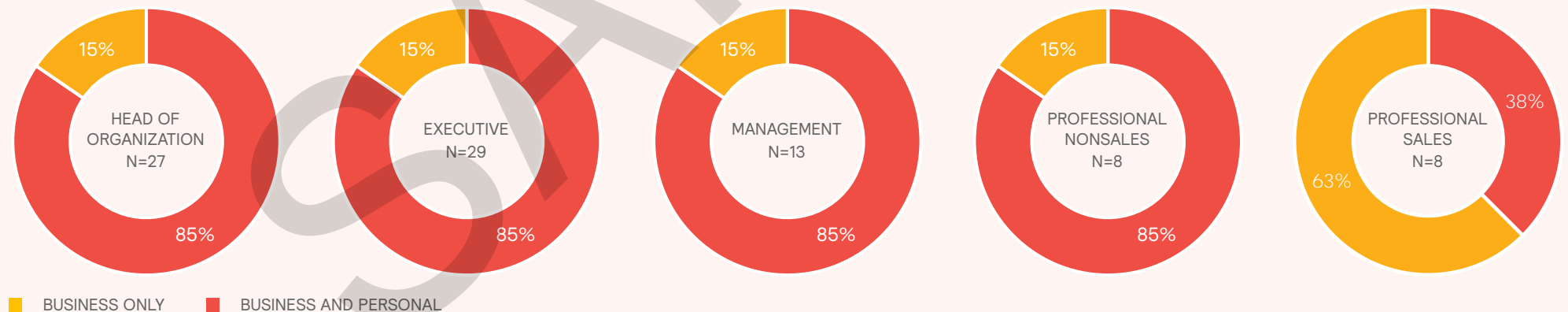
■ YES ■ NO
N=37

ELIGIBILITY BY EMPLOYEE LEVEL



N=37

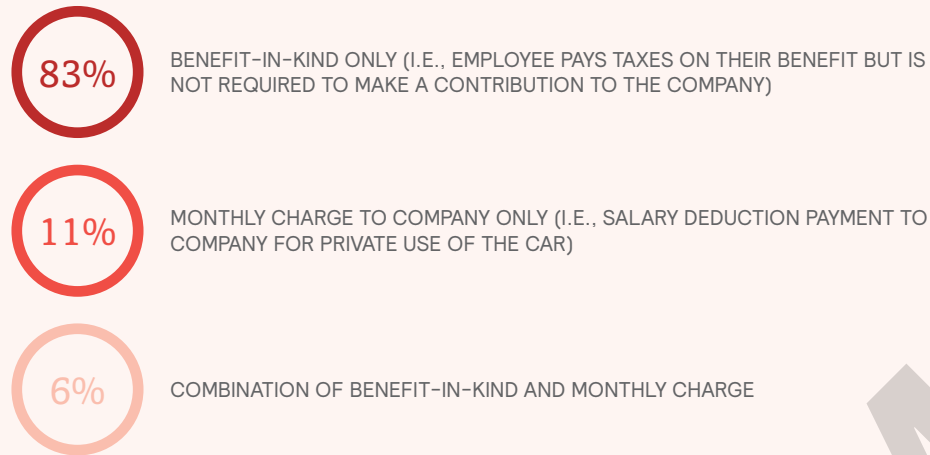
INTENDED USE OF COMPANY-OWNED VEHICLE



■ BUSINESS ONLY ■ BUSINESS AND PERSONAL

COUNTRY

METHOD OF CHARGING EMPLOYEES FOR PRIVATE USE OF VEHICLE



N=18

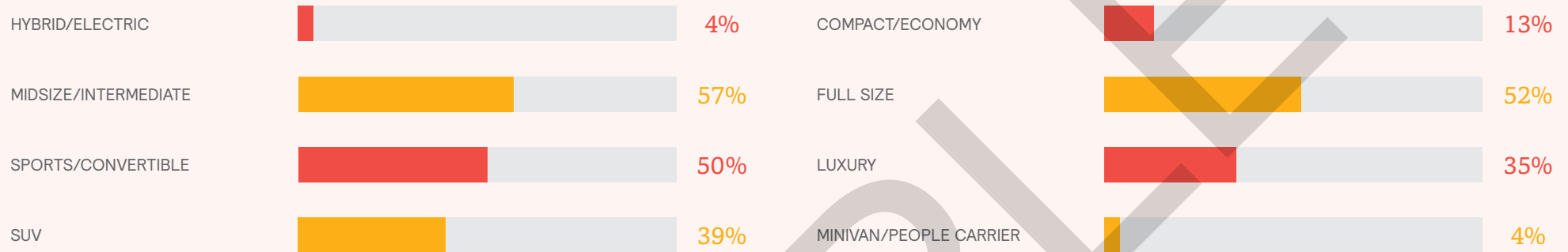
EMPLOYEES ABILITY TO CHOOSE THEIR VEHICLE



N=50

COUNTRY

TYPES OF VEHICLES IN COMPANY-OWNED FLEET



N=23

Note: More than one response was permitted; percentages may sum more than 100%.

VEHICLE CATEGORY PROVIDED TO EACH EMPLOYEE LEVEL

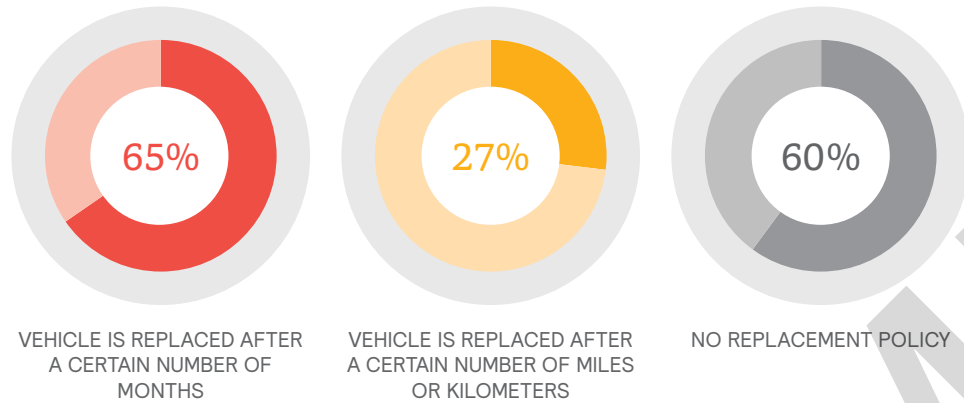
VEHICLE CATEGORY	HEAD OF ORGANIZATION	EXECUTIVE	MANAGEMENT	PROFESSIONAL NONSALES	PROFESSIONAL SALES
HYBRID/ELECTRIC	0%	0%	0%	0%	0%
COMPACT/ECONOMY	6%	5%	20%	5%	20%
MIDSIZE/INTERMEDIATE	22%	42%	60%	42%	60%
FULL SIZE	50%	47%	40%	47%	40%
SPORTS/CONVERTIBLE	0%	0%	0%	0%	0%
LUXURY	39%	21%	10%	21%	10%
SUV	28%	37%	20%	37%	20%
MINIVAN/PEOPLE CARRIER	6%	5%	0%	5%	0%
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Note: More than one response was permitted; percentages may sum more than 100%.

COUNTRY

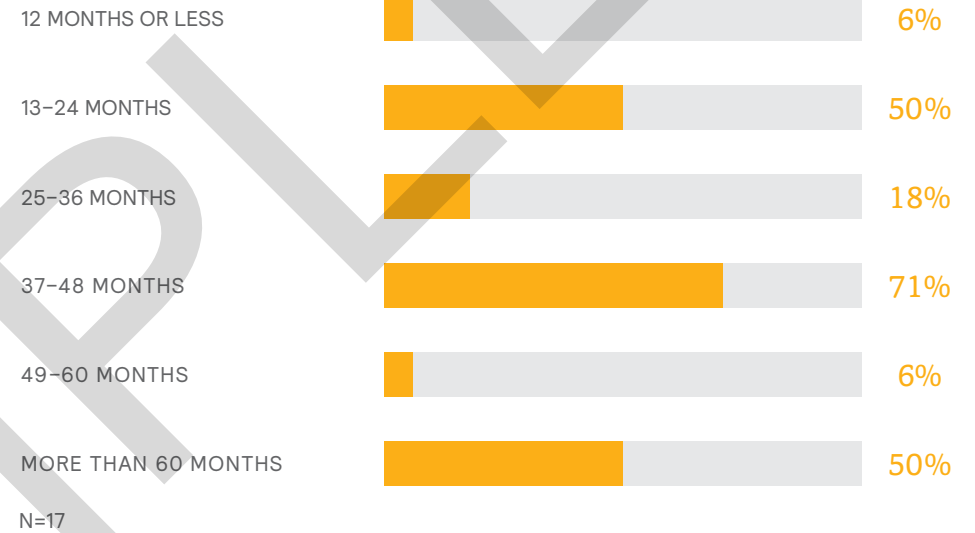
VEHICLE REPLACEMENT POLICIES

POLICY FOR REPLACING A COMPANY-OWNED VEHICLE



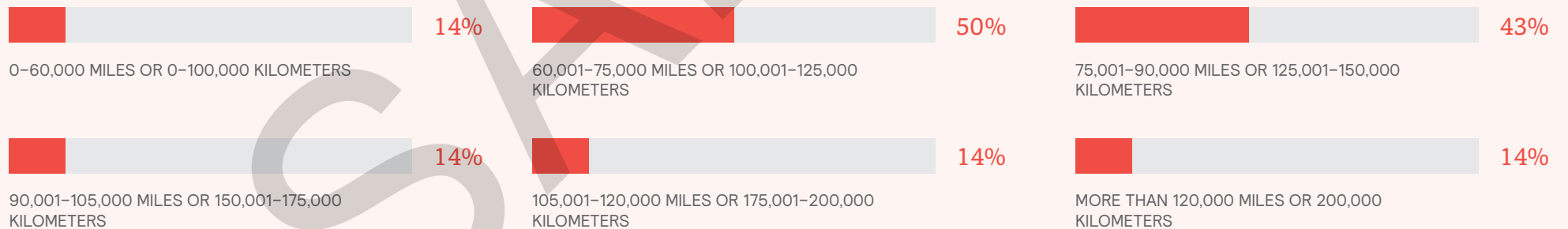
N=26

FREQUENCY OF VEHICLE REPLACEMENT



N=17

MILEAGE/KILOMETER THRESHOLD FOR VEHICLE REPLACEMENT

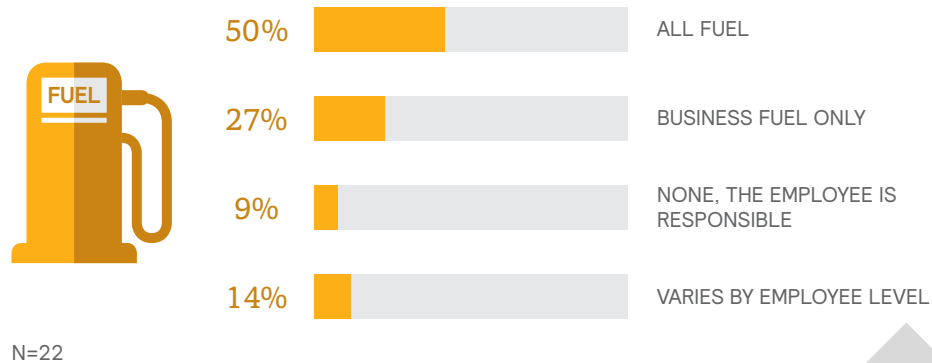


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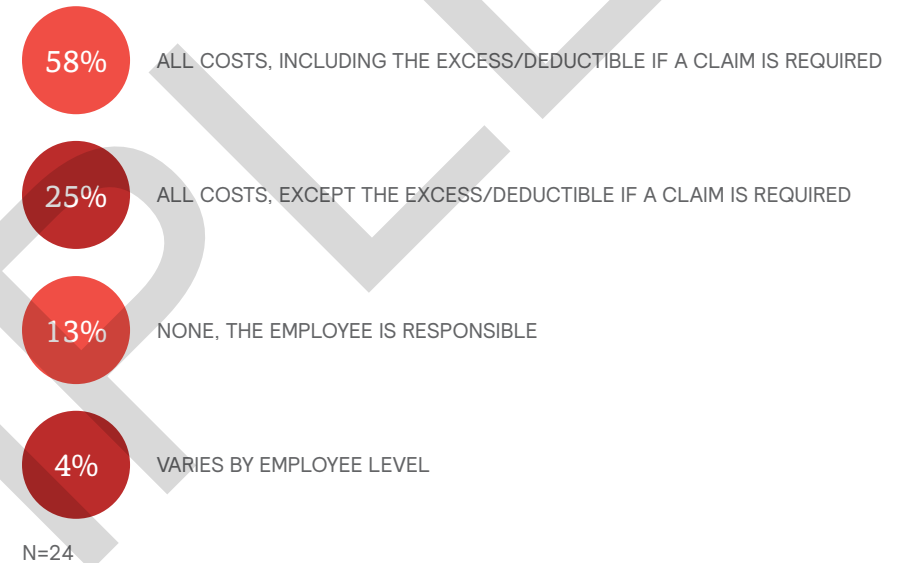
COUNTRY

POLICY FOR COVERING VEHICLE RELATED EXPENSES

COMPANY COVERAGE OF FUEL COSTS



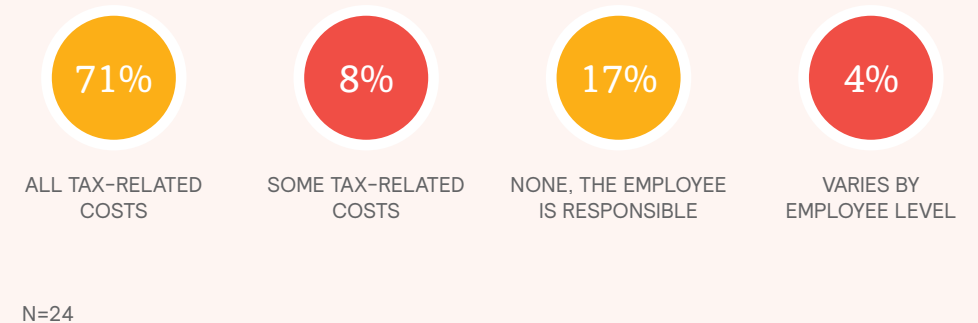
COMPANY COVERAGE OF INSURANCE COSTS



COMPANY COVERAGE OF MAINTENANCE COSTS



COMPANY COVERAGE OF TAX-RELATED COSTS (E.G., ROAD TAX)

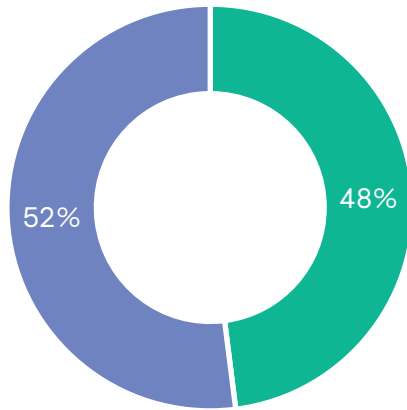


COUNTRY



COMPANY-LEASED VEHICLE POLICIES

COMPANY LEASES VEHICLES FOR CAR BENEFIT PROGRAM



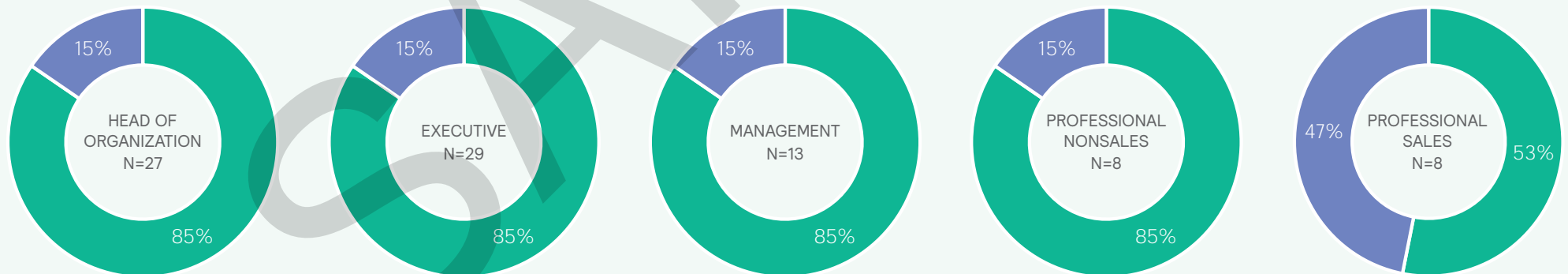
■ YES ■ NO
N=28

ELIGIBILITY BY EMPLOYEE LEVEL



N=37

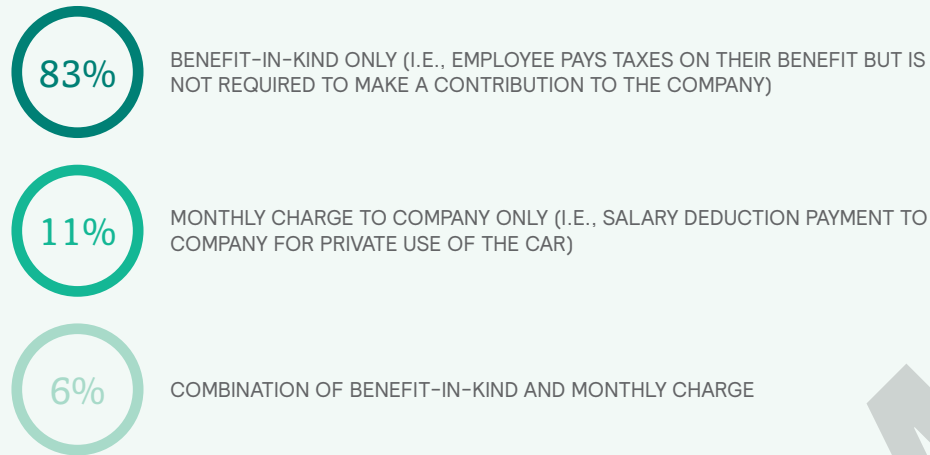
INTENDED USE OF COMPANY-LEASED VEHICLE



■ BUSINESS ONLY ■ BUSINESS AND PERSONAL

COUNTRY

METHOD OF CHARGING EMPLOYEES FOR PRIVATE USE OF LEASED VEHICLE



N=18

EMPLOYEES ABILITY TO CHOOSE THEIR VEHICLE



N=50

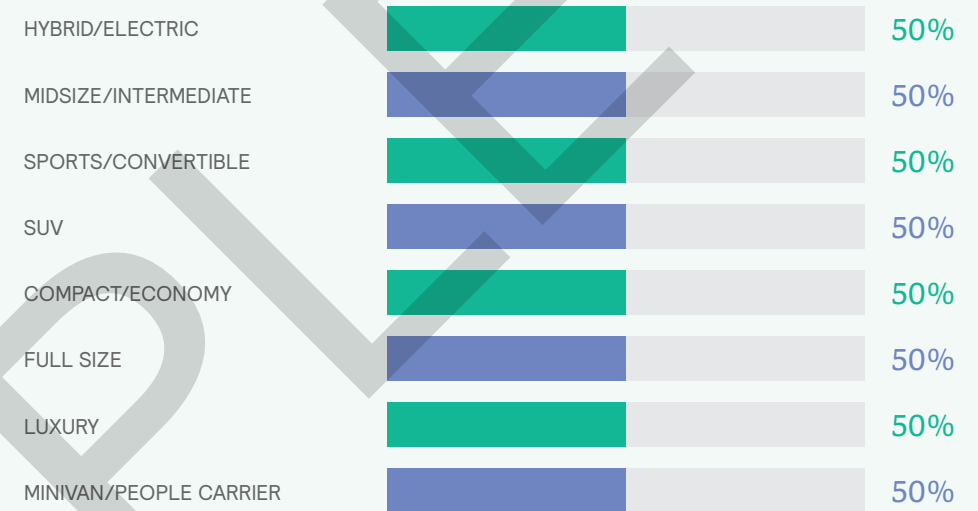
COUNTRY

TYPICAL LENGTH OF VEHICLE LEASE



N=40

TYPES OF VEHICLES IN COMPANY-LEASED FLEET



N=23

Note: More than one response was permitted; percentages may sum more than 100%.

VEHICLE CATEGORY PROVIDED TO EACH EMPLOYEE LEVEL

VEHICLE CATEGORY	HEAD OF ORGANIZATION	EXECUTIVE	MANAGEMENT	PROFESSIONAL NONSALES	PROFESSIONAL SALES
HYBRID/ELECTRIC	0%	0%	0%	0%	0%
COMPACT/ECONOMY	6%	5%	20%	5%	20%
MIDSIZE/INTERMEDIATE	22%	42%	60%	42%	60%
FULL SIZE	50%	47%	40%	47%	40%
SPORTS/CONVERTIBLE	0%	0%	0%	0%	0%
LUXURY	39%	21%	10%	21%	10%
SUV	28%	37%	20%	37%	20%
MINIVAN/PEOPLE CARRIER	6%	5%	0%	5%	0%

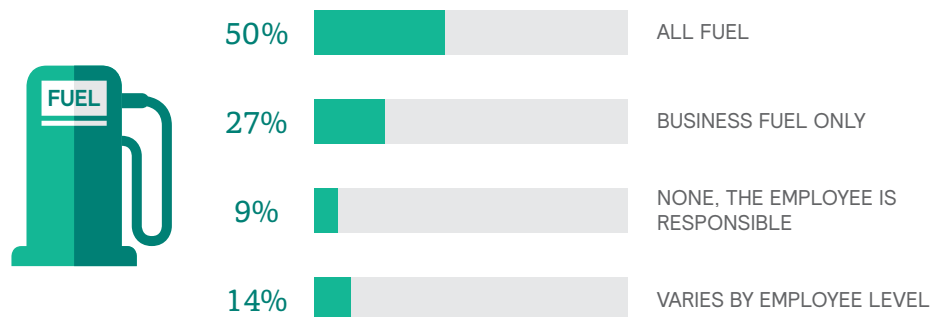
N= 18 19 10 19 10

Note: More than one response was permitted; percentages may sum more than 100%.

COUNTRY

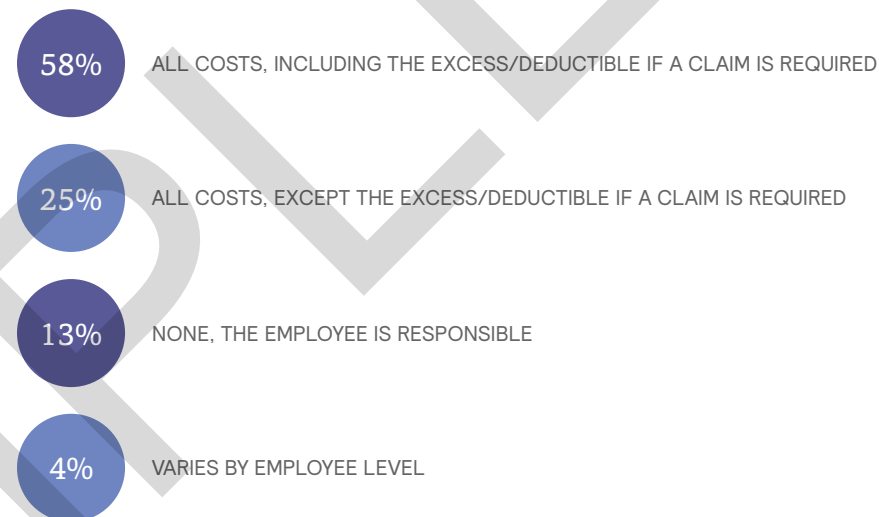
POLICY FOR COVERING VEHICLE RELATED EXPENSES

COMPANY COVERAGE OF FUEL COSTS



N=22

COMPANY COVERAGE OF INSURANCE COSTS



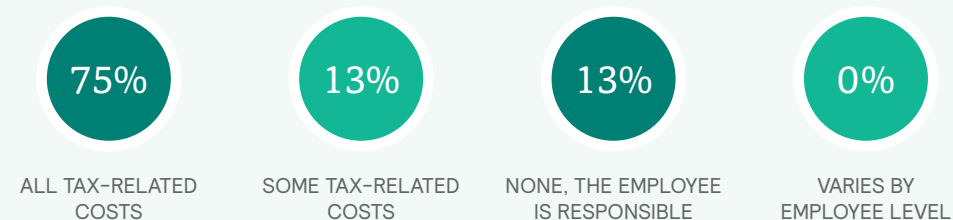
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COMPANY COVERAGE OF MAINTENANCE COSTS



N=9

COMPANY COVERAGE OF TAX-RELATED COSTS (E.G., ROAD TAX)



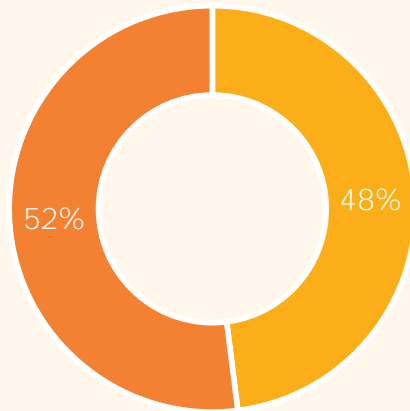
N=8

COUNTRY



CAR ALLOWANCES

COMPANY HAS CAR ALLOWANCE PROGRAM



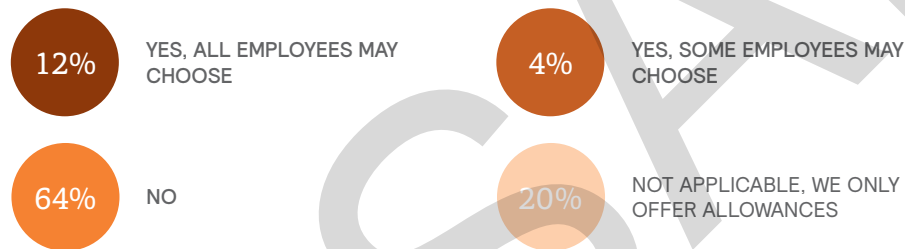
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N=28

ELIGIBILITY BY EMPLOYEE LEVEL



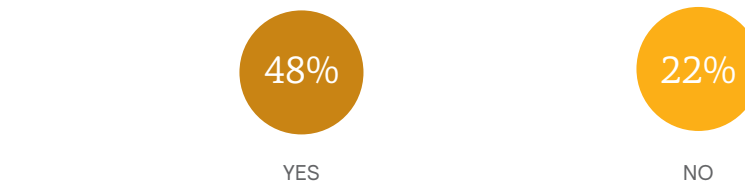
N=37

EMPLOYEE MAY CHOOSE AN ALLOWANCE INSTEAD OF A VEHICLE



N=37

EMPLOYEE MUST USE CAR ALLOWANCE TOWARD COST OF A VEHICLE

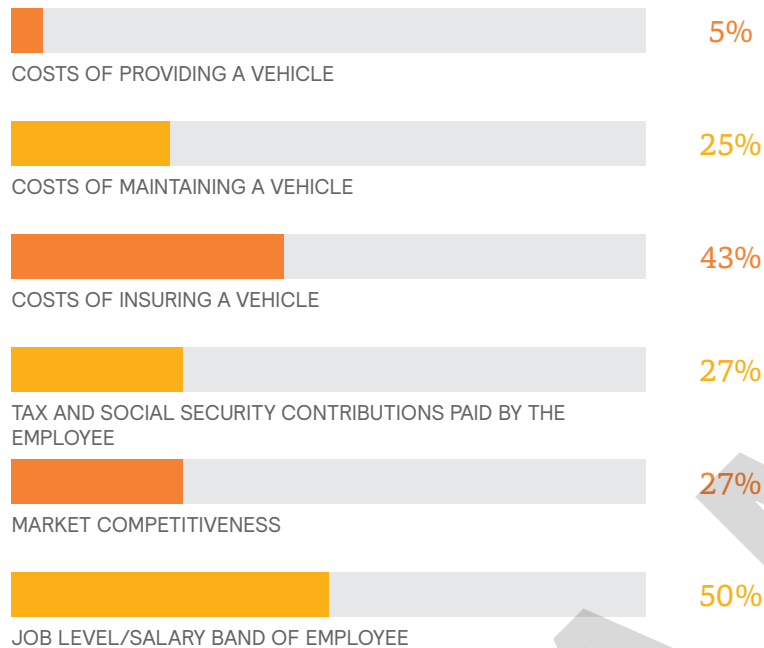


N=5

COUNTRY

ALLOWANCE AMOUNTS

FACTORS CONSIDERED WHEN DETERMINING CAR ALLOWANCE AMOUNT

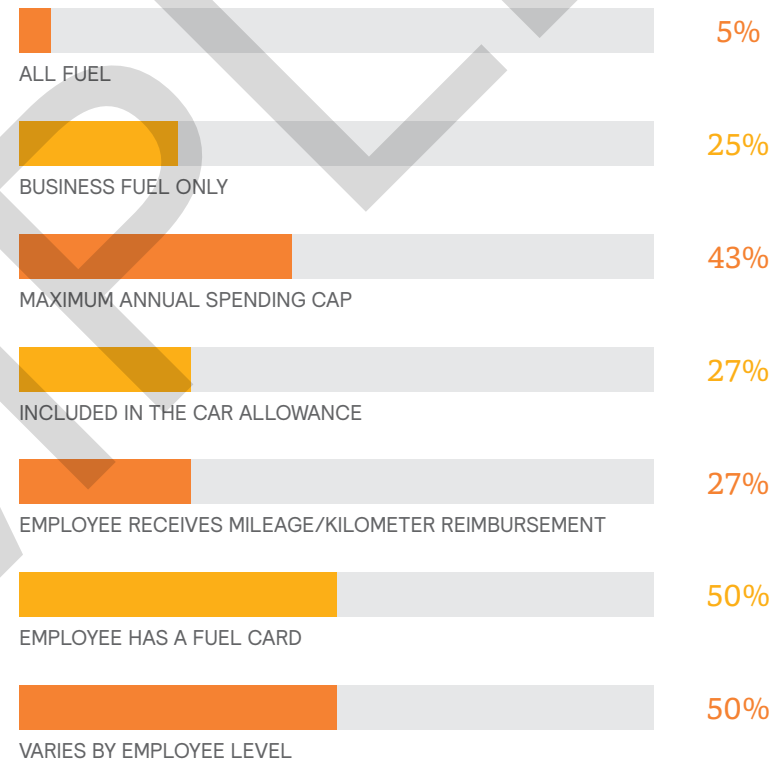


N=23

Note: More than one response was permitted; percentages may sum more than 100%.

POLICY COVERAGE OF VEHICLE RELATED EXPENSES

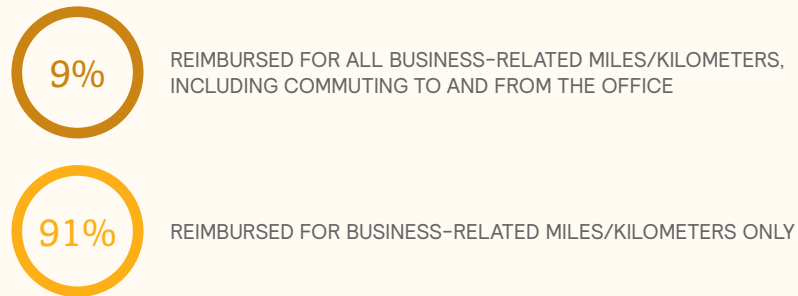
COMPANY COVERAGE OF FUEL COSTS FOR EMPLOYEES WITH A CAR ALLOWANCE



N=44

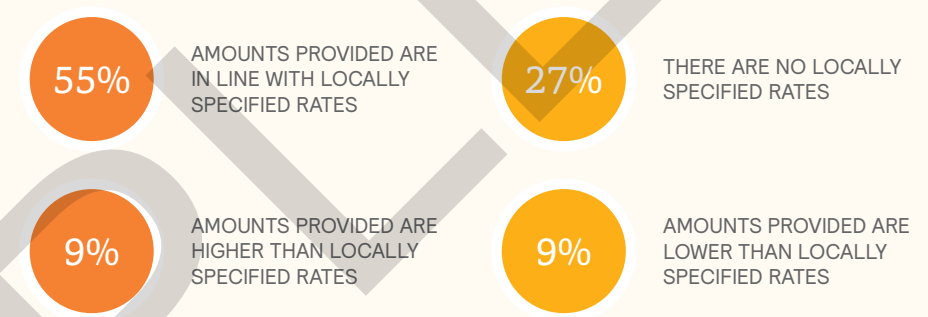
COUNTRY

REIMBURSEMENT FOR MILEAGE/KILOMETER FOR EMPLOYEES WITH A CAR ALLOWANCE



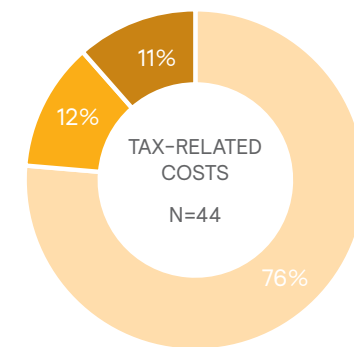
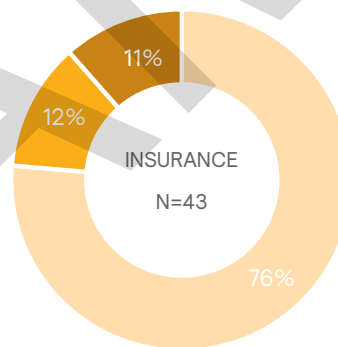
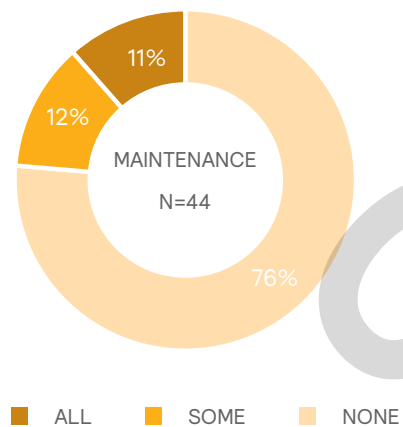
N=18

MILEAGE/KILOMETER REIMBURSEMENT VERSUS LOCAL STATUTORY REQUIREMENTS FOR EMPLOYEES WITH A CAR ALLOWANCE



N=11

REIMBURSEMENT OF OTHER VEHICLE EXPENSES FOR EMPLOYEES WITH A CAR ALLOWANCE



ALL SOME NONE

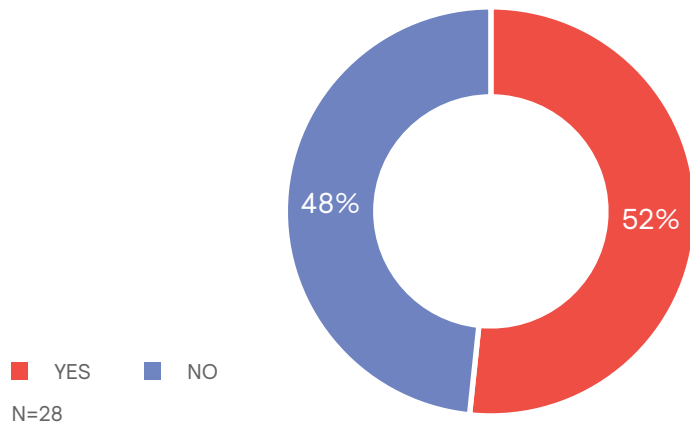
COUNTRY



ALTERNATE TRANSPORTATION BENEFITS

PERSONAL CAR AND DRIVER

REGULAR ACCESS TO PERSONAL CAR AND DRIVER



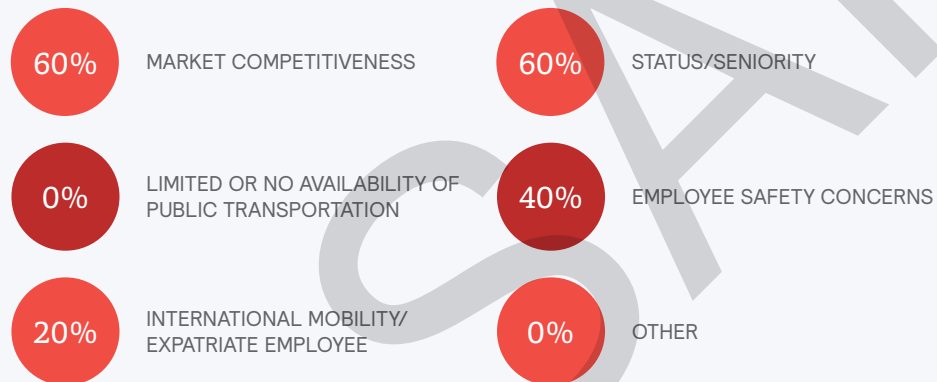
EMPLOYEES ELIGIBLE TO USE PERSONAL CAR AND DRIVER



N=81

Note: More than one response was permitted; percentages may sum more than 100%.

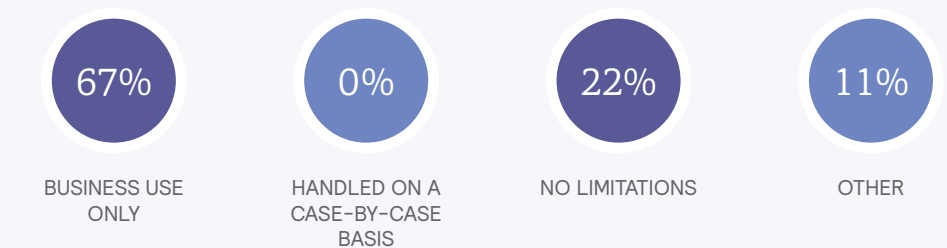
REASONS FOR PROVIDING A PERSONAL CAR AND DRIVER



N=5

Note: More than one response was permitted; percentages may sum more than 100%.

LIMITATIONS OF EMPLOYEE'S USE OF PERSONAL CAR AND DRIVER

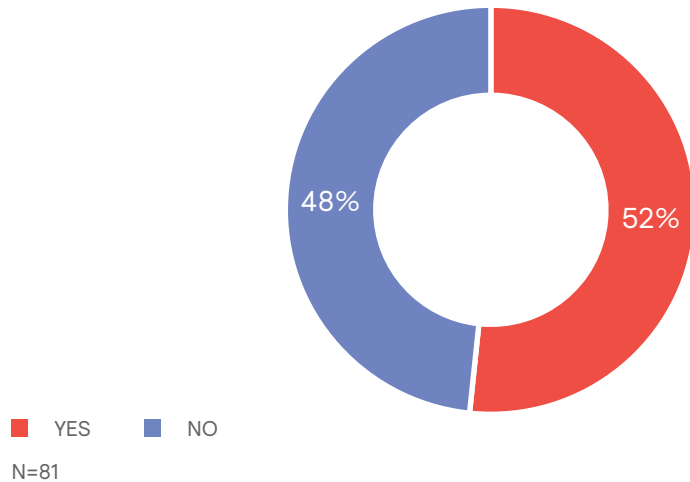


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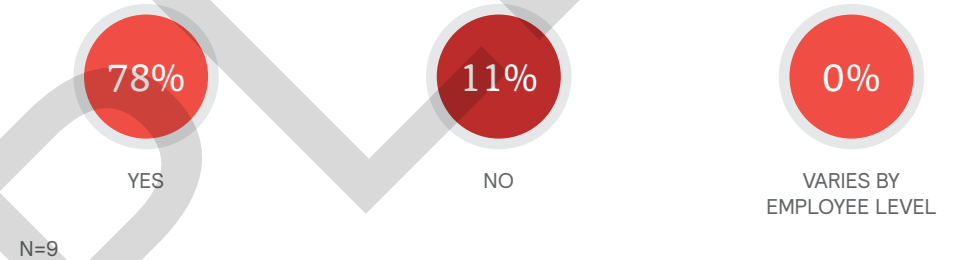
COUNTRY

PREARRANGED EMPLOYEE TRANSPORTATION

REGULAR PREARRANGED EMPLOYEE TRANSPORTATION TO AND FROM THE OFFICE



TRANSPORTATION IS PROVIDED AS A SHARED SERVICE AMONG EMPLOYEES (ONE TAXI TRANSPORTS SEVERAL EMPLOYEES)



REASONS FOR PROVIDING PREARRANGED EMPLOYEE TRANSPORTATION



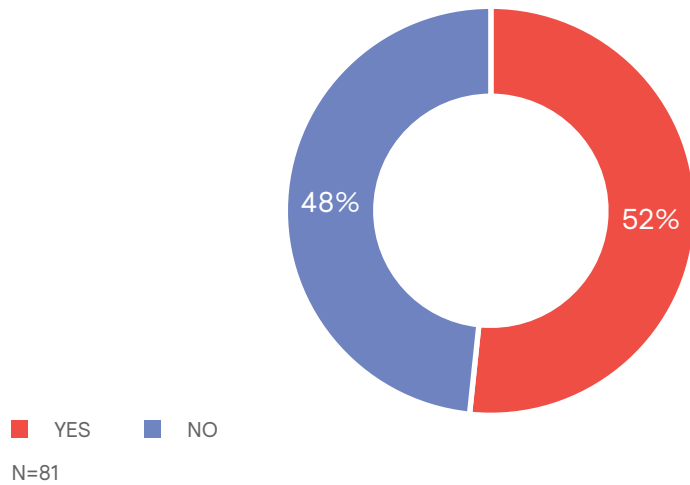
N=81

Note: More than one response was permitted; percentages may sum more than 100%.

COUNTRY

PARKING SUBSIDIES

PROVISION OF SUBSIDIZED OR FREE PARKING



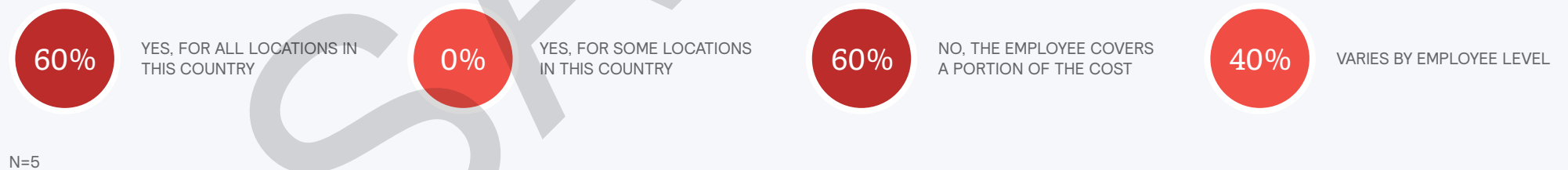
EMPLOYEES ELIGIBLE TO USE SUBSIDIZED OR FREE PARKING



N=81

Note: More than one response was permitted; percentages may sum more than 100%.

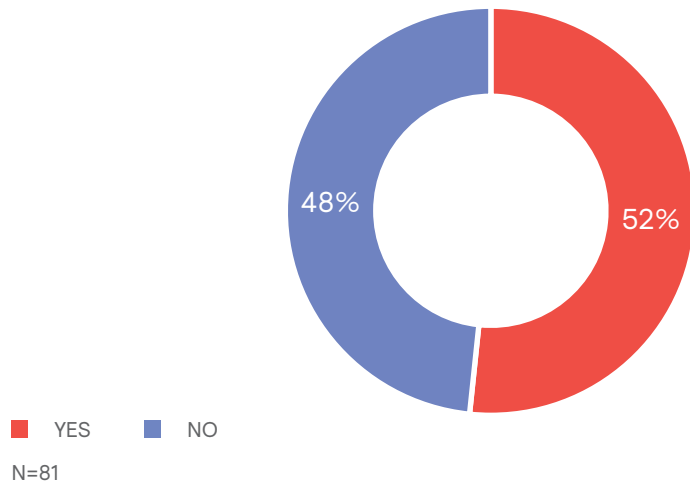
COST OF PARKING FULLY COVERED BY COMPANY



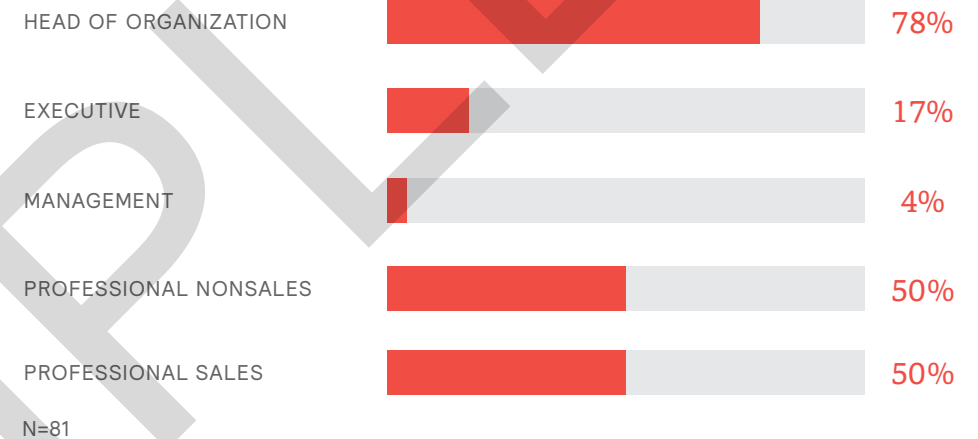
COUNTRY

PUBLIC TRANSPORTATION SUBSIDIES

COST OF PUBLIC TRANSPORTATION IS SUBSIDIZED

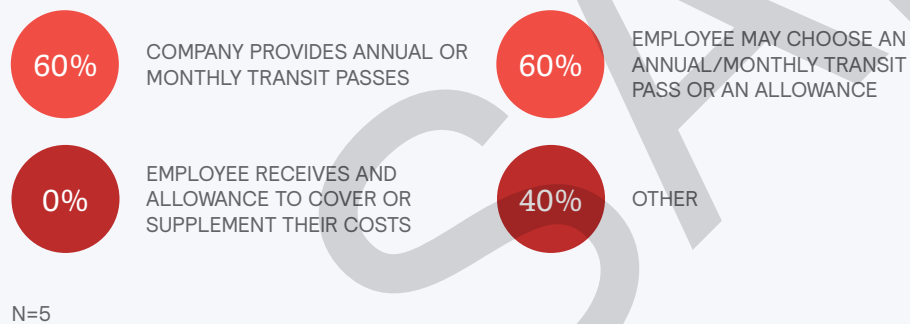


EMPLOYEES ELIGIBLE FOR PUBLIC TRANSPORTATION SUBSIDY OR BENEFIT

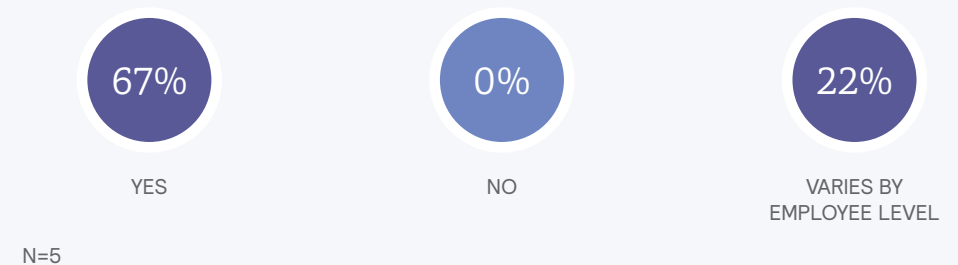


Note: More than one response was permitted; percentages may sum more than 100%.

DELIVERY FORMAT OF THIS BENEFIT



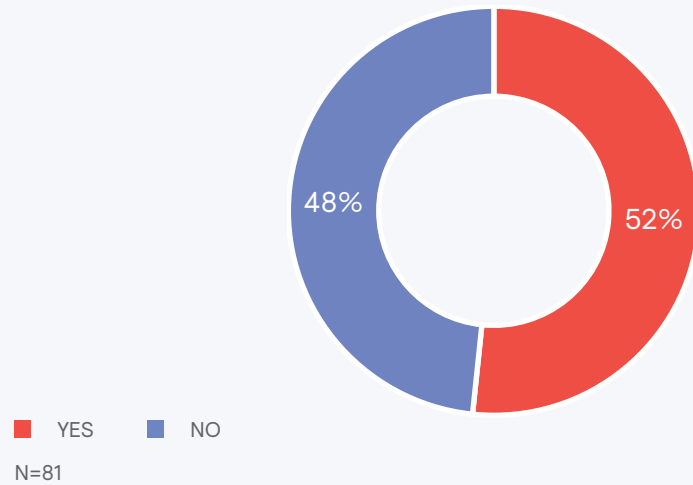
BENEFIT COVERS 100% OF PUBLIC TRANSPORTATION COST



COUNTRY

WALKING OR CYCLING ALLOWANCE

WALKING OR CYCLING ALLOWANCE PROVIDED



EMPLOYEES PROVIDED WITH A WALKING OR CYCLING ALLOWANCE



N=81

Note: More than one response was permitted; percentages may sum more than 100%.



ABOUT THIS REPORT

ABOUT THIS REPORT

This section provides information on the methods of collecting, collating, and analyzing data for this publication. Below are notes on exceptions and exclusions in the data and a list of data sources, relevant equations, and currency conversion rates. Readers will also find a glossary of key terms.

METHODOLOGY

STATISTICS

The following statistics are presented in this report:

- ▶ **P50 or 50th Percentile:** The data point that is higher than 50% of all other data in the sample when ranked from low to high. Also known as the median.
- ▶ **Mean or Average:** The sum of all data reported divided by the number of data observations in the sample.
- ▶ **Prevalence:** The percentage of companies that provided a response to a question with a defined number of options to choose from. For example, a single response question or a check box (select all that apply) style question.
 - ▶ In **single response** questions, the sum of all responses may not equal 100% due to rounding.
 - ▶ In **check box** response questions, the sum of all responses will be greater than 100%.
- ▶ **N or Sample Size:** The number of companies that reported data for the statistic.
- ▶ **Endash or “–”:** The sample is too small to provide the statistic.

DATA MASKING

To ensure the confidentiality of all companies that provide data to Mercer's surveys, statistics have been “masked” by displaying an endash or “–” when minimum sample sizes are not met.

- ▶ A minimum of three data points are required to report the average and prevalence percentages.
- ▶ A minimum of four data points are required to report the 50th percentile or median.

DATA SOURCES

Two primary data sources were used in the creation of this publication: Mercer's 2018 Total Remuneration Survey (TRS) and 2018/2019 Car Benefit Policies (CBP) survey. These sources have been used to create two sections of content for each market. All 85 markets include details on car benefit eligibility and costs and 53 of these markets also contain details on car benefit policies.

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