

FLEET AND MOBILITY BAROMETER 2026

COUNTRY REPORT 

1 FLEET CHARACTERISTICS

2 FINANCING METHODS

3 ENERGY MIX

4 CONNECTED FLEETS

5 EMPLOYEE MOBILITY

6 FUTURE CHALLENGES



RESEARCH APPROACH

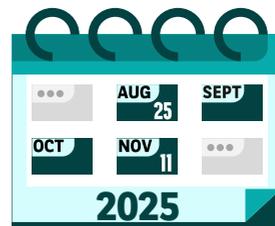


10,157

INTERVIEWS WITH
CORPORATE FLEET
DECISION MAKERS

20-MINUTE
PHONE INTERVIEWS

FIELDWORK
(ALL COUNTRIES)



READING NOTES ABOUT THE REPORT

Some graphics may not be perfectly equal to 100%. It is due to roundings.

RESEARCH OBJECTIVES

1



What short term shifts
are shaping the market?

2



What kind of vehicles will
the market expect in 3 years?

3

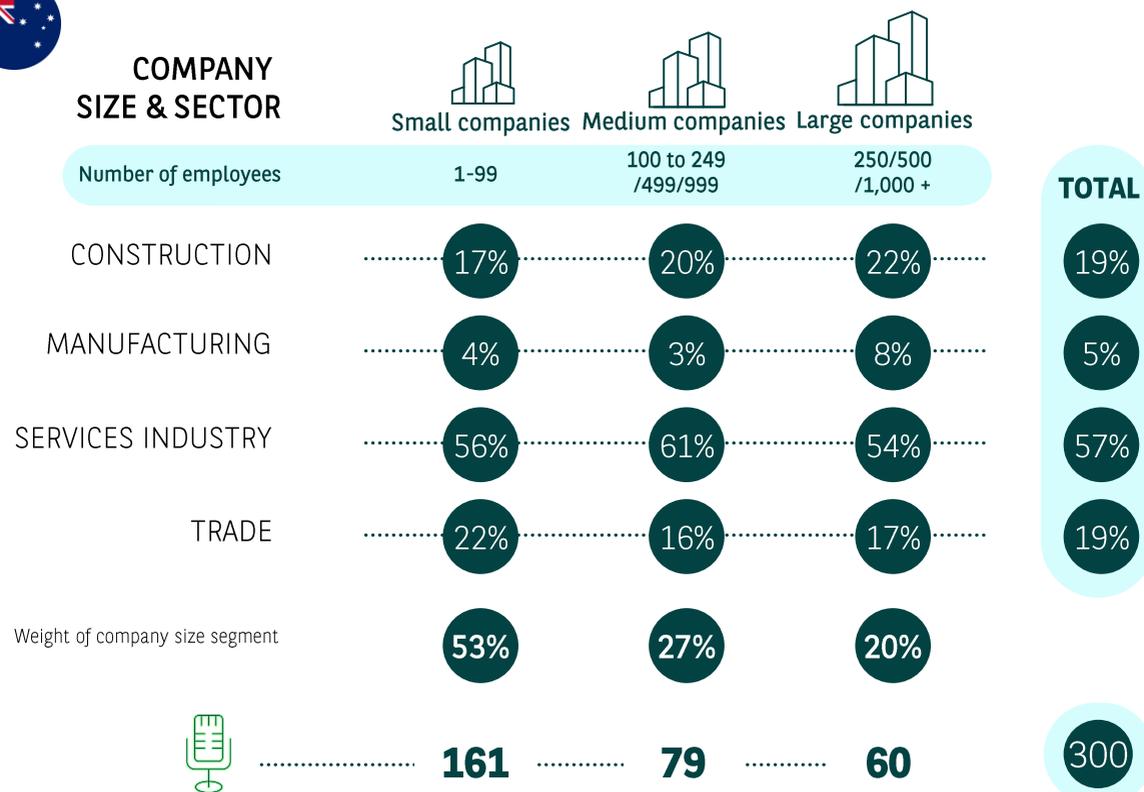


How do mobility solutions
impact corporate mobility?

QUOTAS ON COMPANY SIZE & INDUSTRY



COMPANY SIZE & SECTOR



33 COUNTRIES - 4 REGIONAL BENCHMARKS



Morocco and Turkey: compared with Europe benchmark



FLEET OUTLOOK REMAINS POSITIVE FOR MOST AUSTRALIAN COMPANIES

93% anticipate their fleet will either remain stable or grow in the next 3 years (with 24% expecting growth)

28% include second-hand vehicles in their fleets, lower than the APAC average of 48%. 55% are considering it



OPERATIONAL LEASING HOLDS GROWTH POTENTIAL

21% intend to introduce or increase their use of full-service leasing to finance their fleet

10% quote full-service leasing as the main financing method for their fleet, with a higher prevalence among large companies (20%) compared to small (7%) and medium-sized companies (10%)



A STABLE AND SIGNIFICANT FLEET ELECTRIFICATION IN AUSTRALIA

52% already use electrified passenger cars, with medium-sized companies leading at 63%, compared to small companies at 49% and large companies at 46%. 9% are considering it

61% consider the lack of charging infrastructure as the main barrier to BEV adoption for passenger cars. But **86%** have or plan to implement a charging strategy at the company premises, and 67% are supporting public charging



A DOWNWARD TREND IN TELEMATICS ADOPTION, WITH LIMITED BUT EMERGING USAGE POTENTIAL

32% have adopted telematics, which is lower than the 41% reported in 2024

Only **10%** of them use telematics data. However, the potential remains significant, with **46%** of companies considering leveraging this data.



MOBILITY POLICIES REMAIN A CORPORATE PRIORITY, DRIVEN BY TAX, HR, AND CSR NEEDS

32% provide, or are considering providing, cards for multiple mobility solutions. Meanwhile, 43% prioritize personal vehicle reimbursement, and ride-sharing by 39%

40% claim tax benefits as their main motivation for developing corporate mobility, while 39% point to CSR considerations and 39% to HR related needs



DECARBONIZATION AND INNOVATIVE FLEET MANAGEMENT SOLUTIONS TOP MANAGERS' AGENDA

15% have set targeted decarbonization goals to date, and 24% are currently evaluating them. Mitigating the increase in TCO, adapting to ICE policies and navigating low emission zones in urban areas are top priorities

47% are spontaneously eager for innovative solutions that enhance fleet performance management

01

FLEET CHARACTERISTICS

What are the key characteristics of fleets?



Most Australian companies are confident about their fleet prospects

93% of Australian companies expect their fleet size to remain stable or increase over the next three year, with 24% expecting growth, a trend consistent across company sizes and vehicle types, and aligned with the APAC average.

More than a quarter of Australian companies have adopted second-hand vehicles

In 2026, 28% of Australian companies have incorporated second-hand vehicles into their fleets, which is below the APAC average of 48%. This implementation is more pronounced for passenger car fleets (23%) compared to light commercial vehicle (LCV) fleets (9%).

Additionally, 55% of Australian companies are considering adding second-hand vehicles to their fleets.

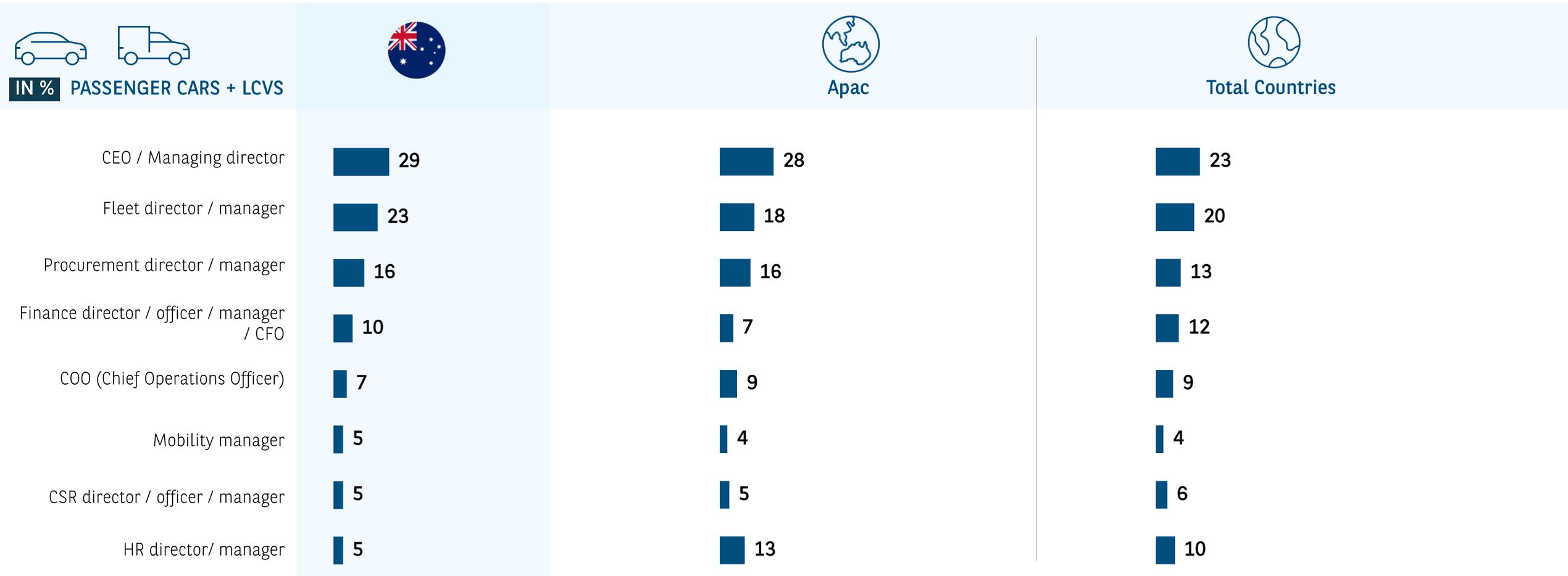
Few companies in Australia currently outsource fleet management services

In 2026, 12% of companies outsource these services, a stable figure.

RESPONDENT POSITION

HOW TO READ THE RESULTS ?

In Australia, 29% of the respondents are CEO / Managing director.



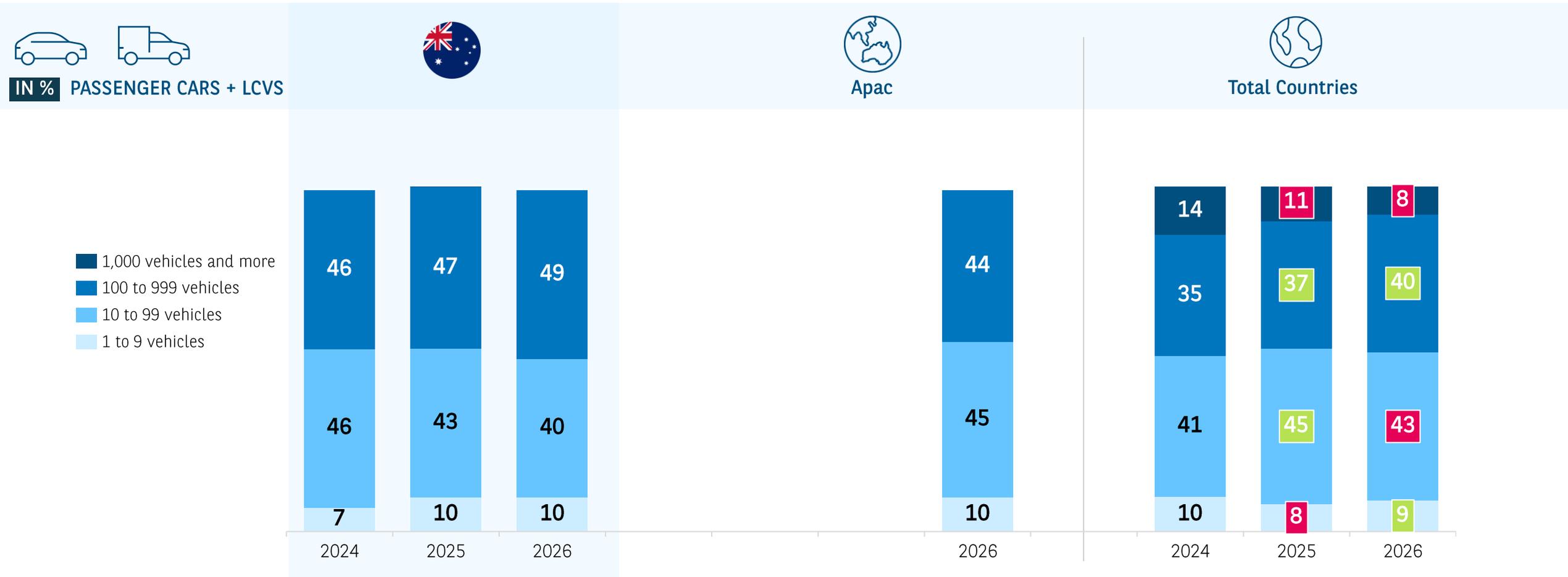
SC5TER. Could you please specify your exact position in the company?

Basis: companies with corporate vehicles = 100%

NUMBER OF VEHICLES IN FLEETS

HOW TO READ THE RESULTS ?

In Australia in 2026, vehicle fleets are composed of: 10% with 1-9 vehicles, 40% with 10-99 vehicles, 49% with 100-999 vehicles and 0% with 1,000 or more.



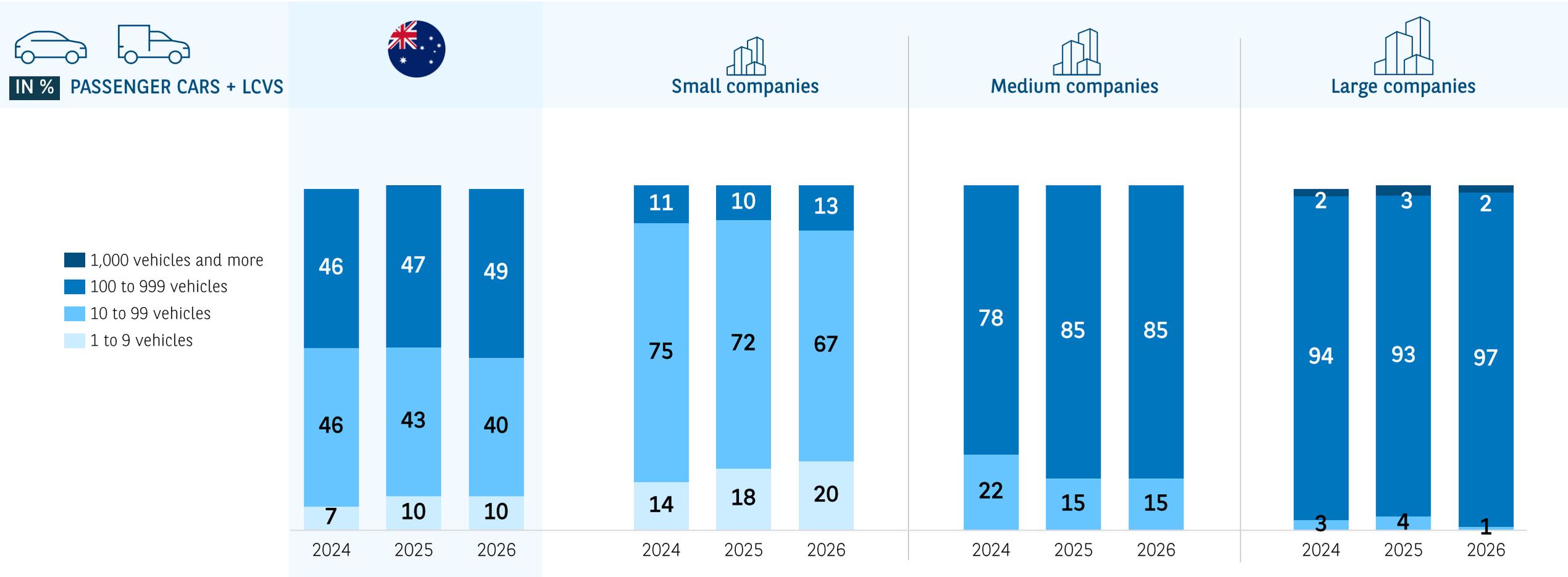
A5/ZDA5. Can you please tell us the total number of vehicles of less than 3.5 tons in your fleet?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

NUMBER OF VEHICLES IN FLEETS

HOW TO READ THE RESULTS ?

In Australia in 2026, vehicle fleets are composed of: 10% with 1-9 vehicles, 40% with 10-99 vehicles, 49% with 100-999 vehicles and 0% with 1,000 or more.



A5/ZDA5. Can you please tell us the total number of vehicles of less than 3.5 tons in your fleet?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

NUMBER OF PASSENGER CARS AND LCVS IN FLEETS

HOW TO READ THE RESULTS ?

In Australia in 2026, passenger car fleets are composed of: 35% with 1-9 vehicles, 48% with 10-99 vehicles, 17% with 100-999 vehicles and 0% with 1000 or more. And LCV fleets are composed of: 25% with 1-9 vehicles, 37% with 10-99 vehicles, 38% with 100-999 vehicles and 0% with 1,000 or more.



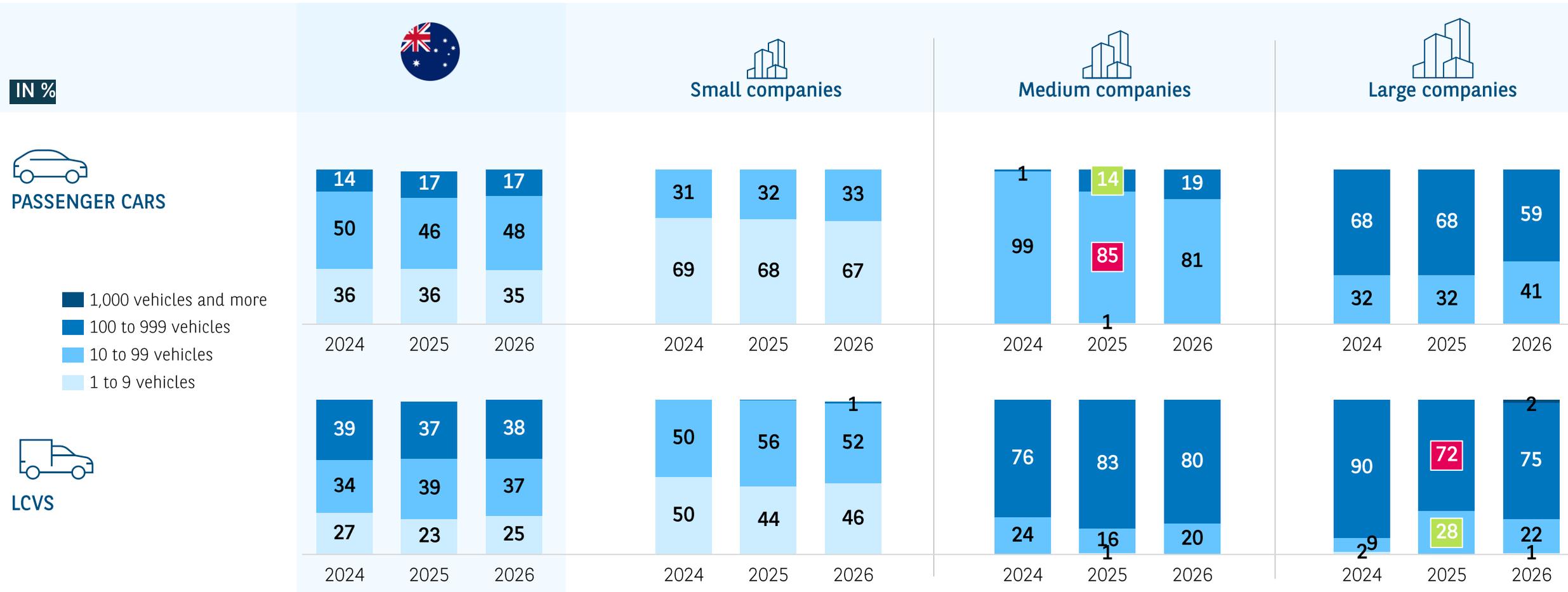
A5F. Can you please tell us the total number of cars and then the number of LCV's or vans in your fleet?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

NUMBER OF PASSENGER CARS AND LCVS IN FLEETS

HOW TO READ THE RESULTS ?

In Australia in 2026, passenger car fleets are composed of: 35% with 1-9 vehicles, 48% with 10-99 vehicles, 17% with 100-999 vehicles and 0% with 1000 or more. And LCV fleets are composed of: 25% with 1-9 vehicles, 37% with 10-99 vehicles, 38% with 100-999 vehicles and 0% with 1,000 or more.



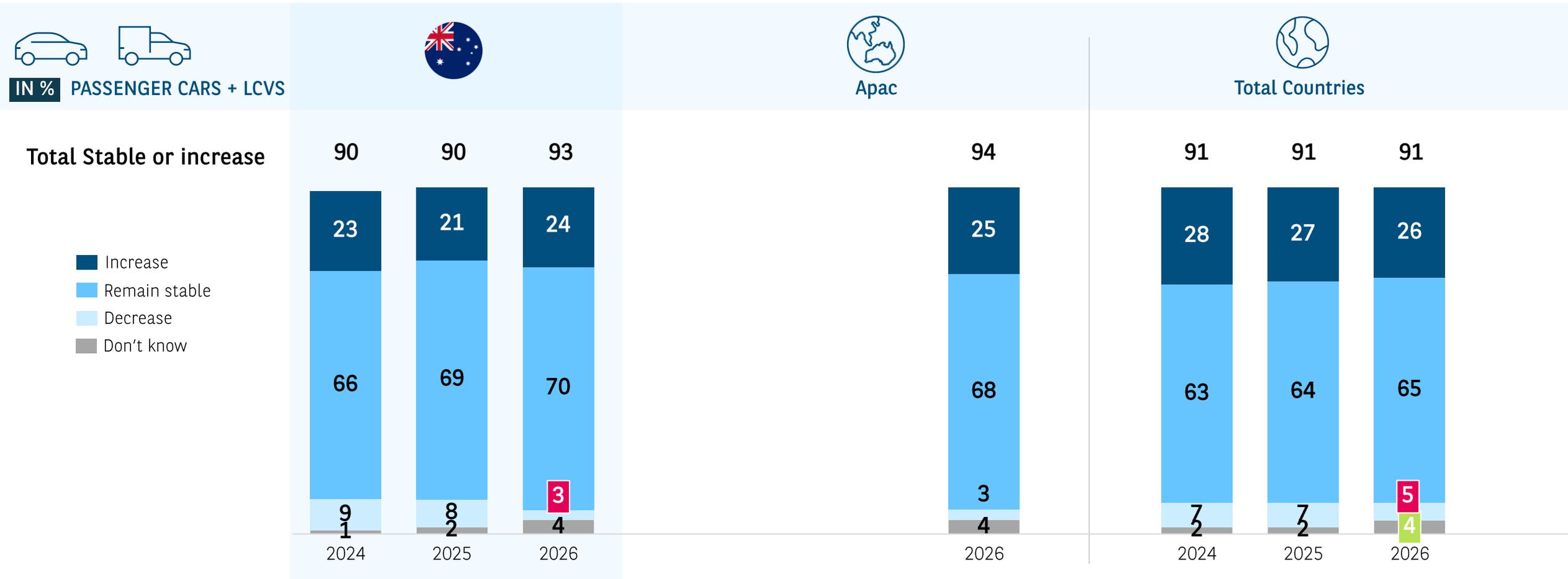
A5F. Can you please tell us the total number of cars and then the number of LCV's or vans in your fleet?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Australia in 2026, 93% of the companies expect their fleet to remain stable or to increase in the next 3 years.



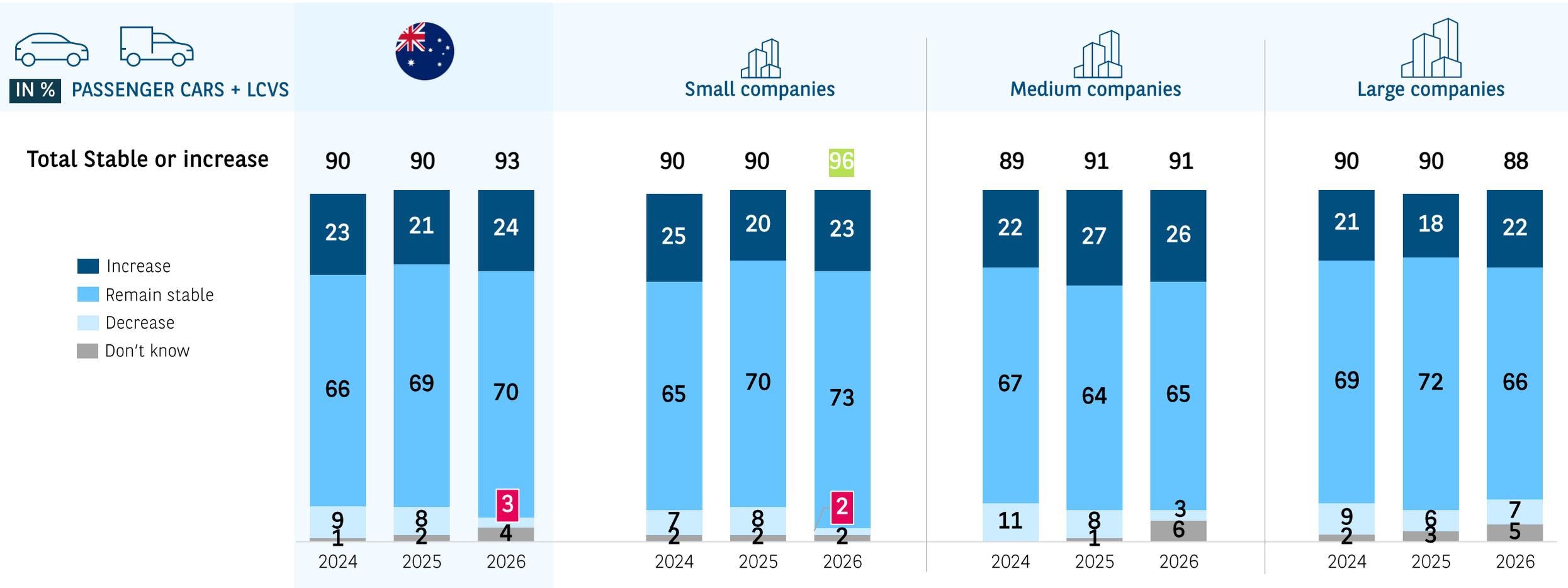
A8. In the next three years, do you think that the total number of vehicles in your company fleet will increase, decrease or remain the same?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Australia in 2026, 93% of the companies expect their fleet to remain stable or to increase in the next 3 years.



A8. In the next three years, do you think that the total number of vehicles in your company fleet will increase, decrease or remain the same?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Australia in 2026, 93% of the companies expect their fleet to remain stable or to increase in the next 3 years.

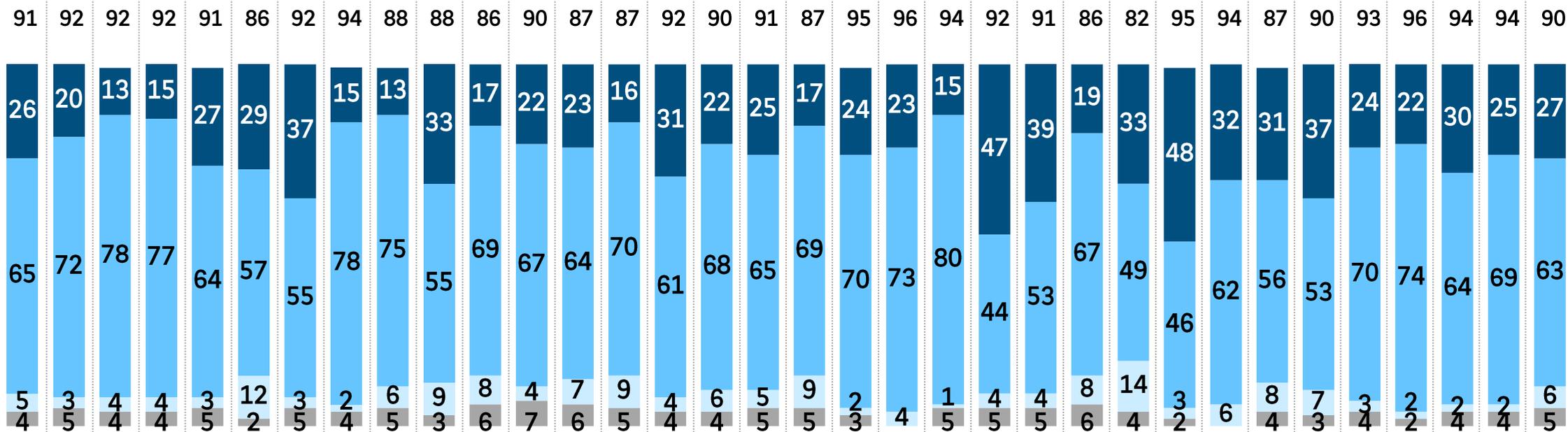


IN % PC + LCVS

- W
- AT
- CH
- DE
- ES
- FR
- GR
- IT
- PT
- UK
- BE
- LU
- NL
- CZ
- PL
- SK
- RO
- DK
- FI
- NO
- SE
- MA
- TR
- BR
- CL
- PE
- US
- CA
- MX
- AU
- NZ
- IN
- ID
- TH

Total Stable or increase

- Increase
- Remain stable
- Decrease
- Don't know



A8. In the next three years, do you think that the total number of vehicles in your company fleet will increase, decrease or remain the same?

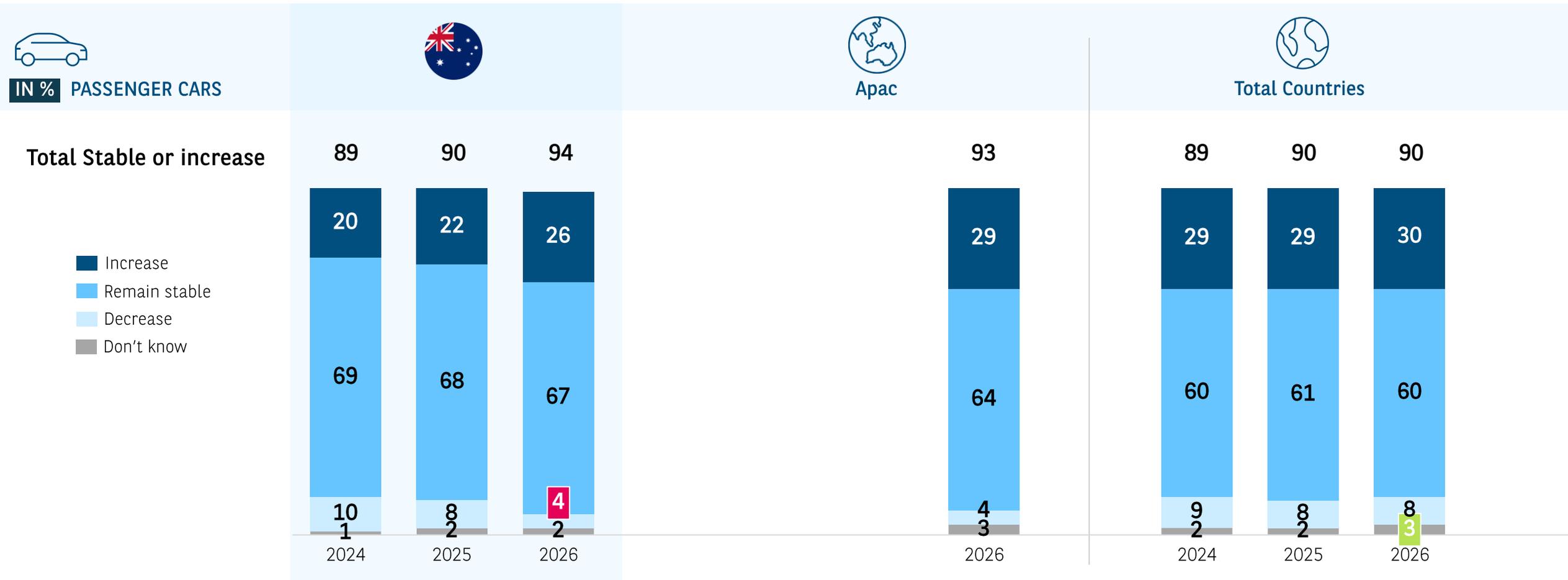
Basis: companies with corporate vehicles = 100%



PASSENGER CAR FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Australia in 2026, 94% of the companies expect their passenger car fleet to remain stable or to increase in the next 3 years.



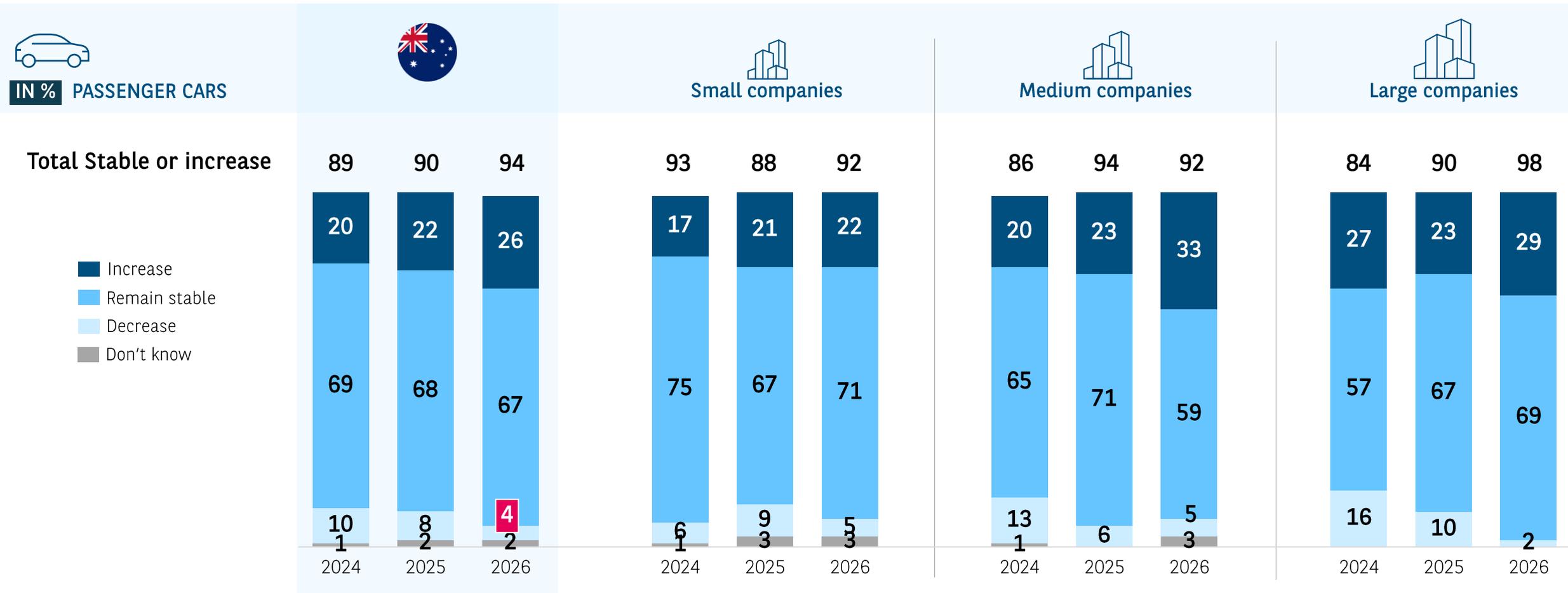
A9. In the next three years, do you think that the total number of your passenger cars will...?
 Basis: companies with passenger cars

X% Significantly higher / lower vs. previous wave

PASSENGER CAR FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Australia in 2026, 94% of the companies expect their passenger car fleet to remain stable or to increase in the next 3 years.



A9. In the next three years, do you think that the total number of your passenger cars will...?
Basis: companies with passenger cars

X% Significantly higher / lower vs. previous wave

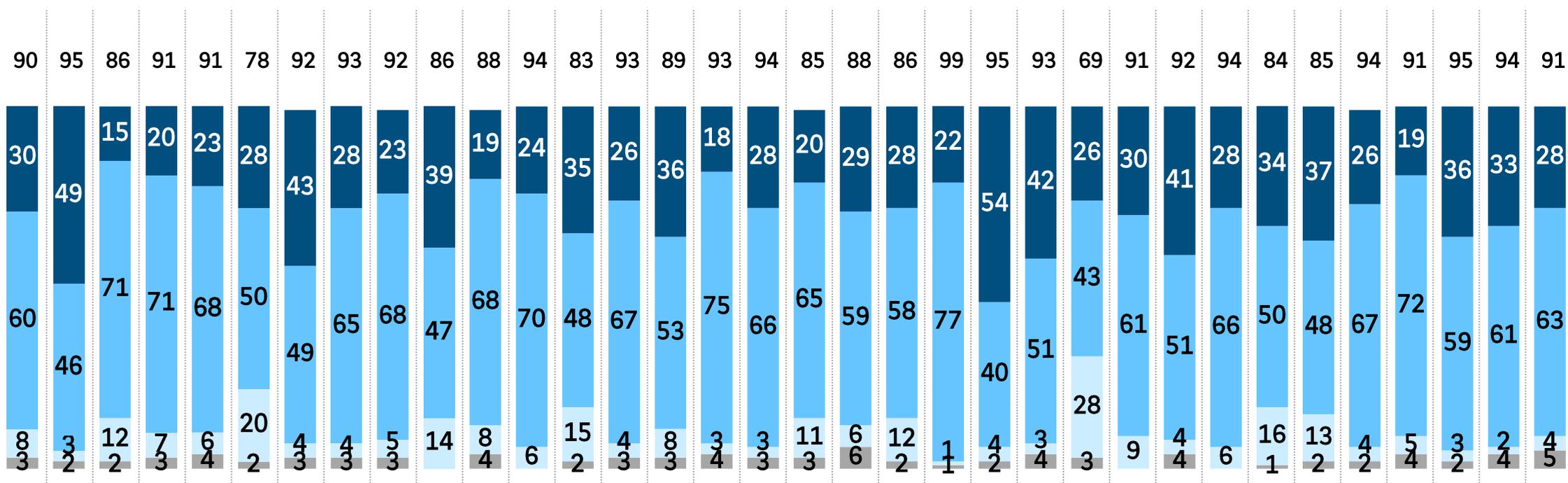
PASSENGER CAR FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Australia in 2026, 94% of the companies expect their passenger car fleet to remain stable or to increase in the next 3 years.



IN % PC



A9. In the next three years, do you think that the total number of your passenger cars will...?

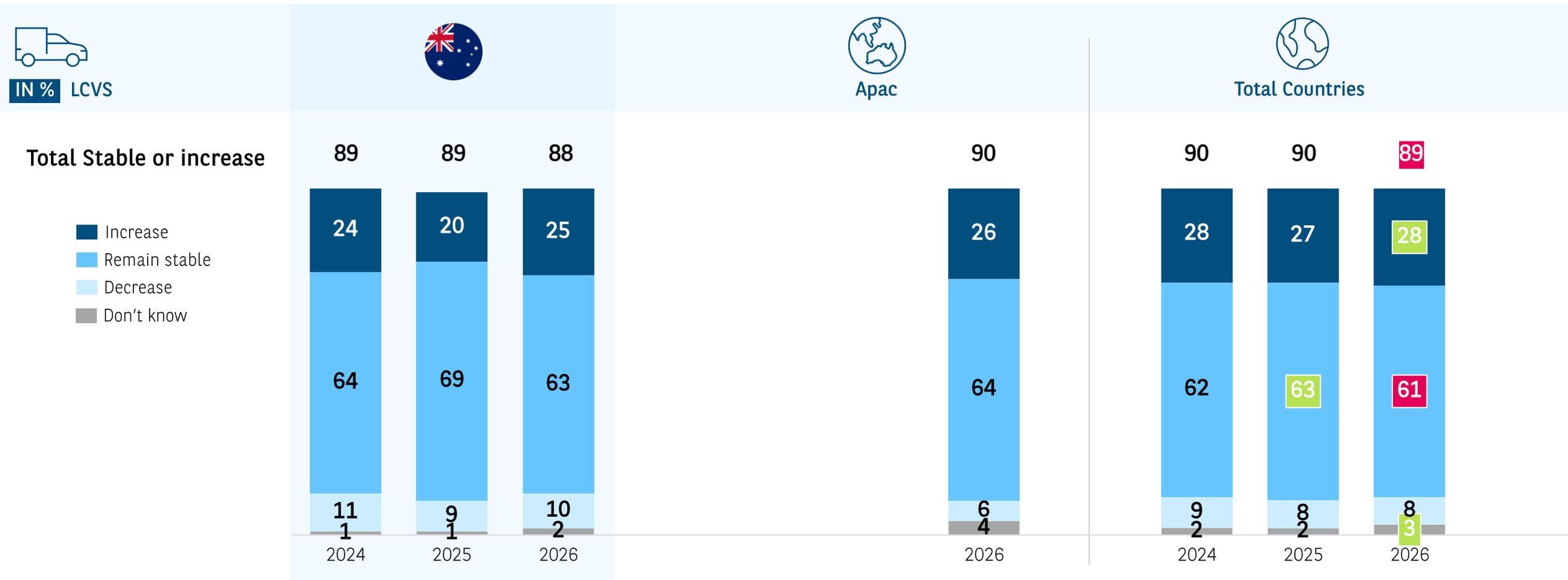
Basis: companies with passenger cars



LCV FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Australia in 2026, 88% of the companies expect their LCV fleet to remain stable or to increase in the next 3 years.



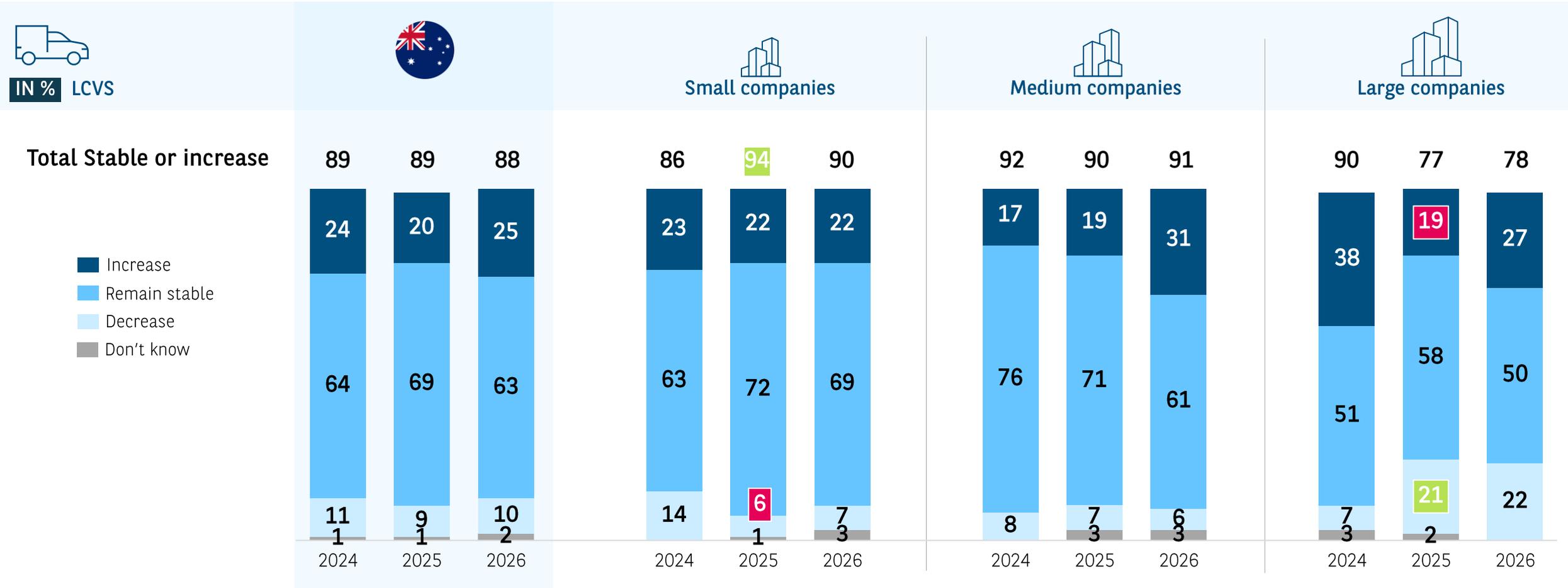
A10. In the next three years, do you think that the total number of your light commercial vehicles or vans will...?
Basis: companies with LCVs

X% Significantly higher / lower vs. previous wave

LCV FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Australia in 2026, 88% of the companies expect their LCV fleet to remain stable or to increase in the next 3 years.



A10. In the next three years, do you think that the total number of your light commercial vehicles or vans will...?
Basis: companies with LCVs

X% Significantly higher / lower vs. previous wave

LCV FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Australia in 2026, 88% of the companies expect their LCV fleet to remain stable or to increase in the next 3 years.

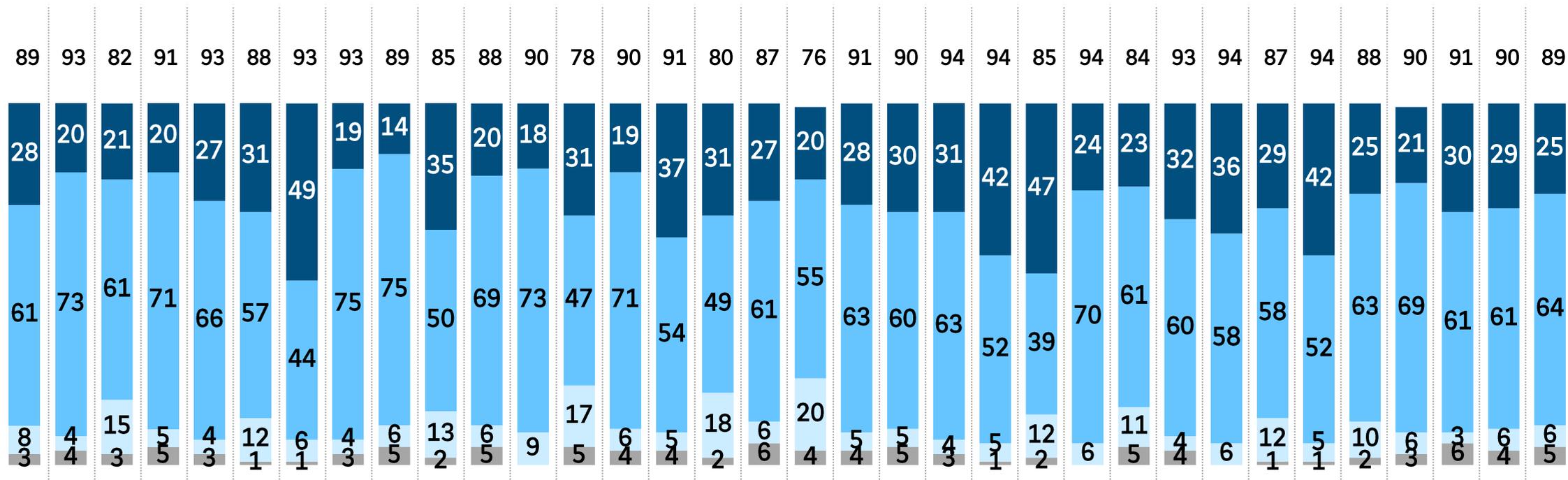


IN % LCVS



Total Stable or increase

- Increase
- Remain stable
- Decrease
- Don't know



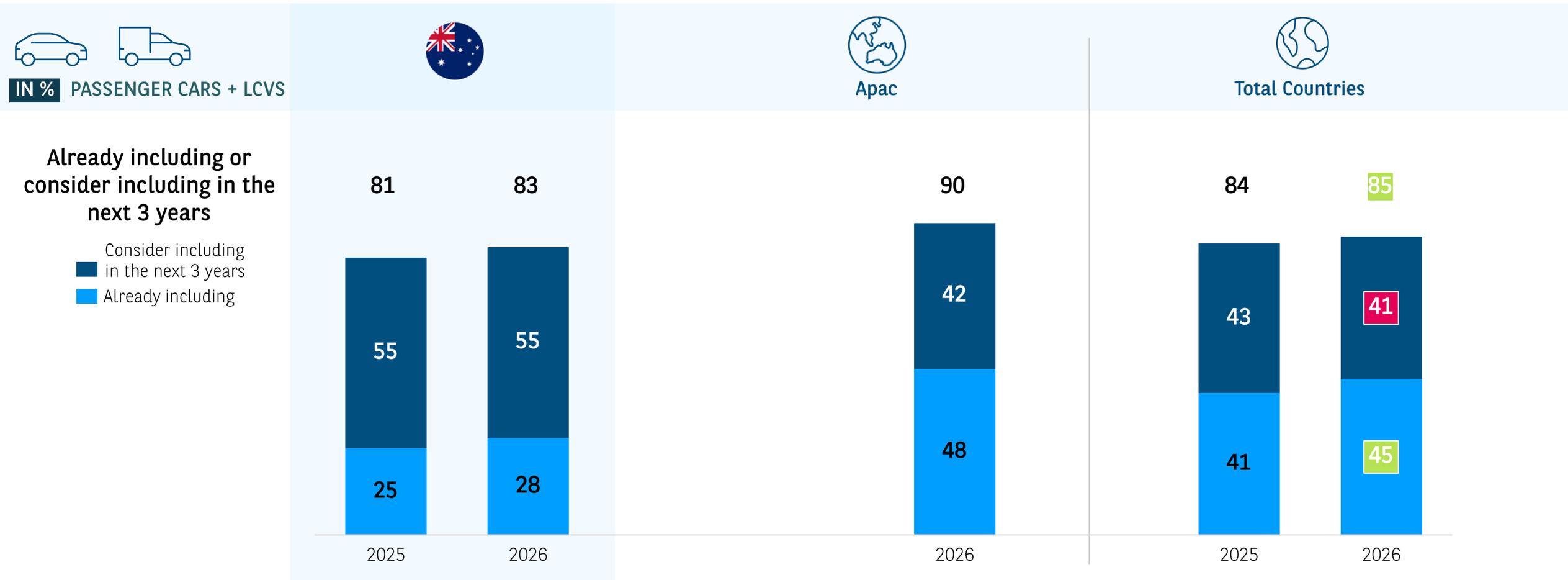
A10. In the next three years, do you think that the total number of your light commercial vehicles or vans will...?
Basis: companies with LCVs



USED / SECOND-HAND VEHICLES POSSESSION

HOW TO READ THE RESULTS ?

In Australia in 2026, 83% of the companies are already including vehicles that were not new when acquired or are considering doing so in the next 3 years.



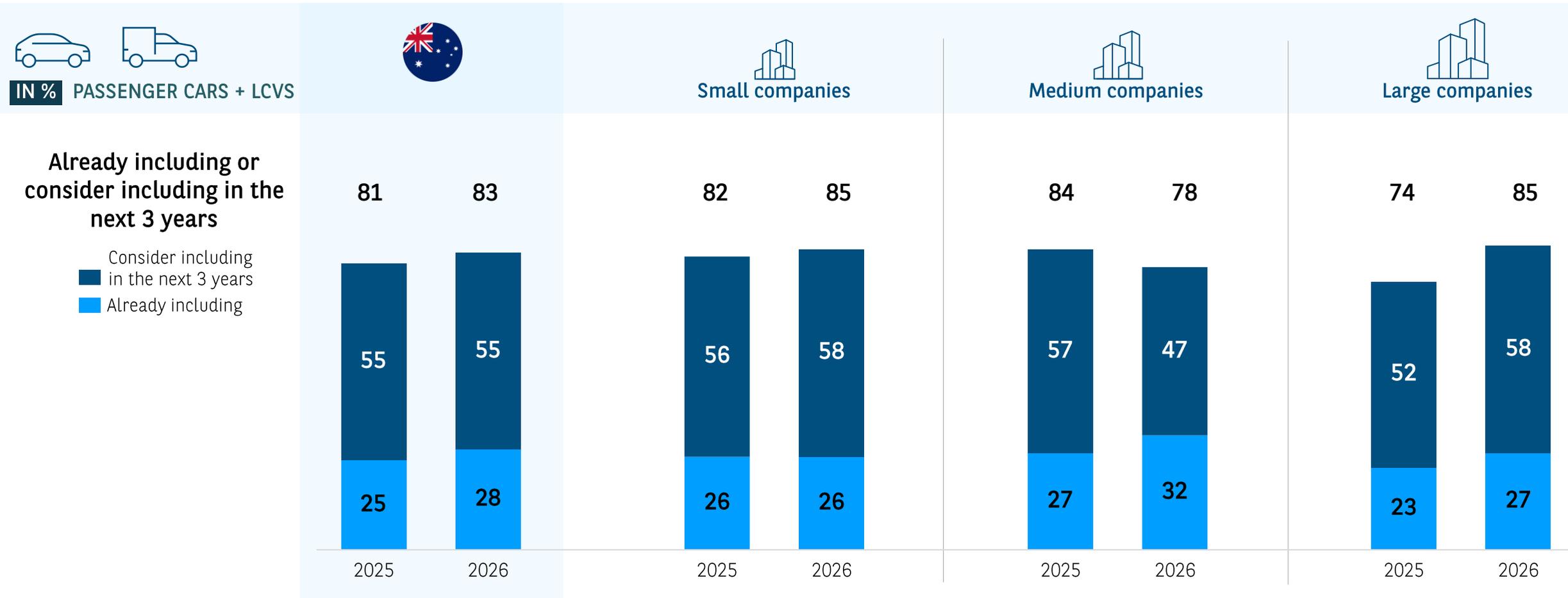
A14. Does your fleet include vehicles that were not new when you acquired them, or do you consider including some in the next 3 years?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

USED / SECOND-HAND VEHICLES POSSESSION

HOW TO READ THE RESULTS ?

In Australia in 2026, 83% of the companies are already including vehicles that were not new when acquired or are considering doing so in the next 3 years.



A14. Does your fleet include vehicles that were not new when you acquired them, or do you consider including some in the next 3 years?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

USED / SECOND-HAND VEHICLES POSSESSION

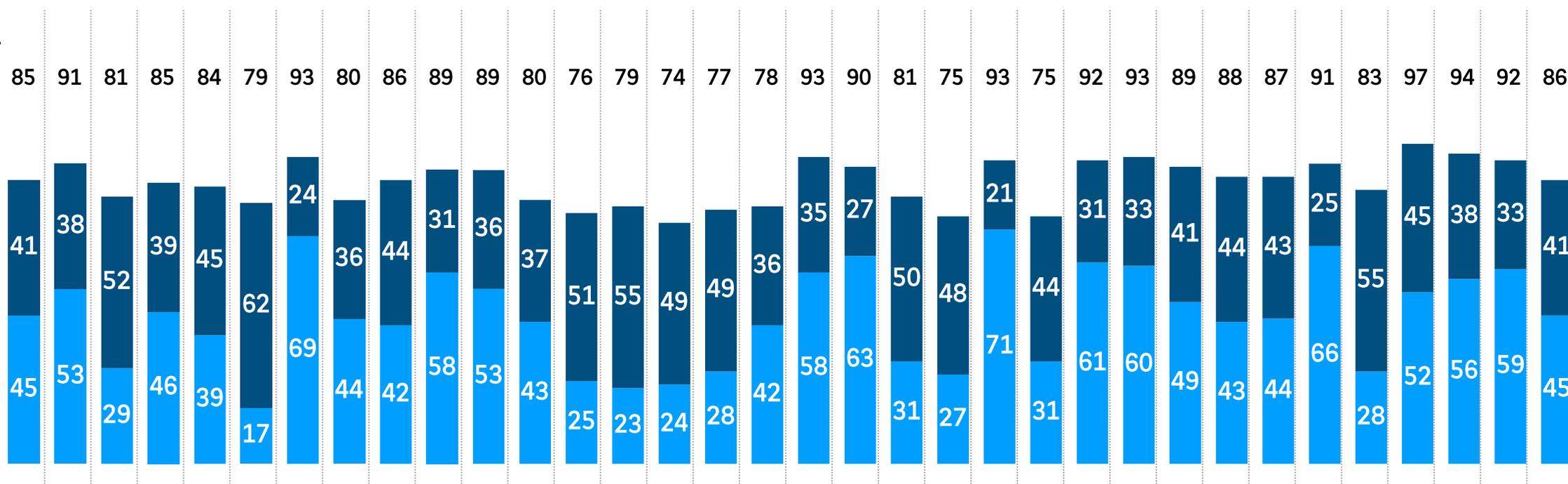
HOW TO READ THE RESULTS ?

In Australia in 2026, 83% of the companies are already including vehicles that were not new when acquired or are considering doing so in the next 3 years.



Already including or consider including in the next 3 years

Consider including in the next 3 years
 Already including



A14. Does your fleet include vehicles that were not new when you acquired them, or do you consider including some in the next 3 years?

Basis: companies with corporate vehicles = 100%



USED / SECOND-HAND VEHICLES POSSESSION

HOW TO READ THE RESULTS ?

In Australia in 2026, 70% of the companies are already including or are considering including passenger cars that were not new when acquired. 46% of the companies are already including or are considering including LCVs that were not new when acquired.



A14. Does your fleet include vehicles that were not new when you acquired them, or do you consider including some in the next 3 years?
Basis: companies with corporate vehicles = 100%

X% Significantly higher/lower vs. previous wave

USED / SECOND-HAND VEHICLES POSSESSION

HOW TO READ THE RESULTS ?

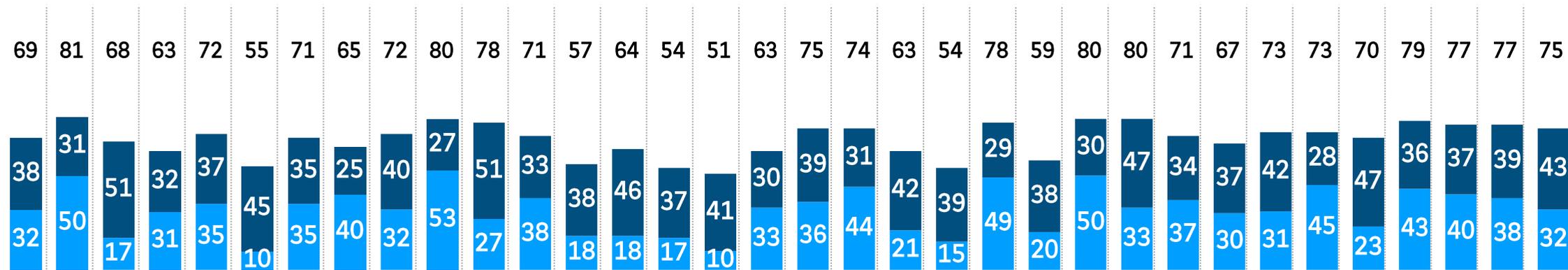
In Australia in 2026, 70% of the companies are already including or are considering including passenger cars that were not new when acquired. 46% of the companies are already including or are considering including LCVs that were not new when acquired.

IN %



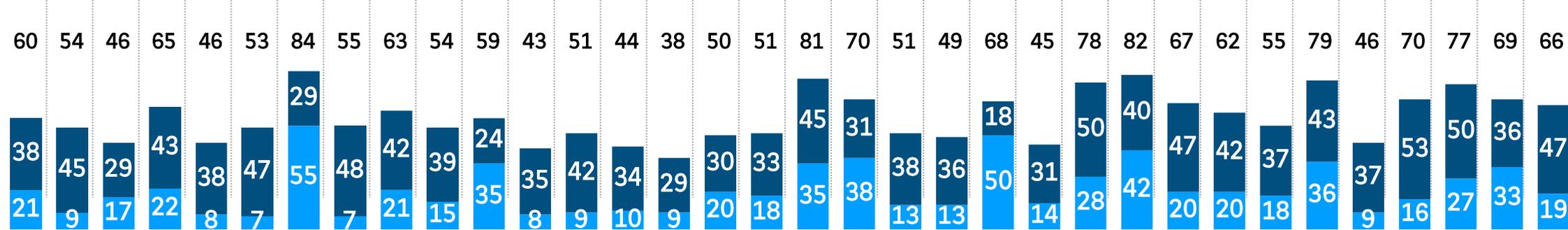
Already including or consider including in the next 3 years

PASSENGER CARS
 Consider including in the next 3 years
 Already including



Already including or consider including in the next 3 years

LCVS
 Consider including in the next 3 years
 Already including



A14. Does your fleet include vehicles that were not new when you acquired them, or do you consider including some in the next 3 years?
 Basis: companies with corporate vehicles = 100%

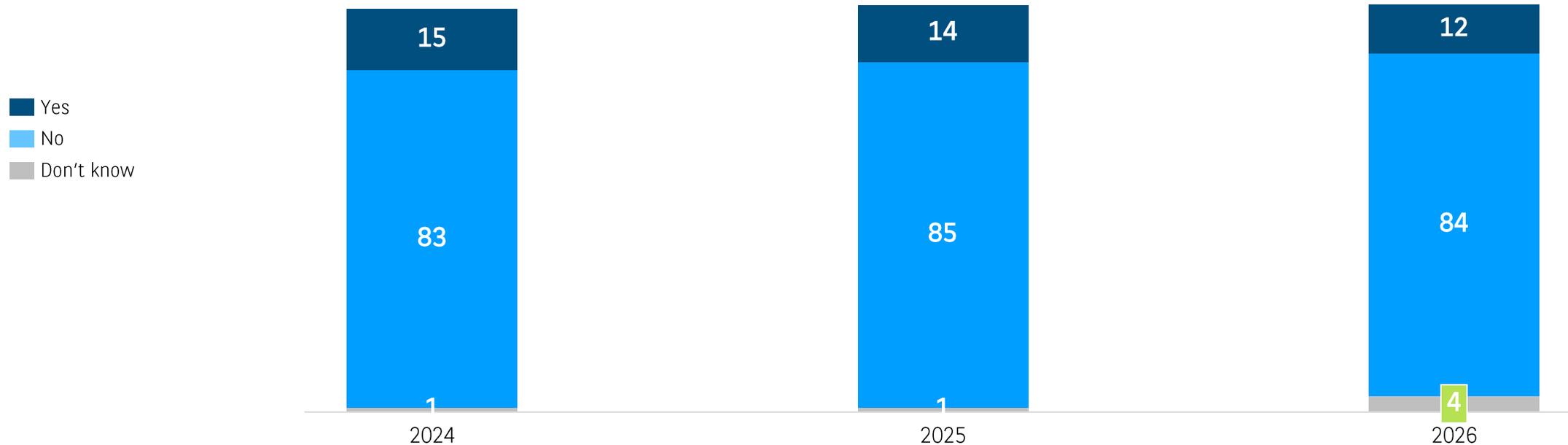
OUTSOURCING OF SERVICES IN TERMS OF FLEET MANAGEMENT

HOW TO READ THE RESULTS ?

In 2026, 12% of the companies outsource services in terms of fleet management.

Local question

IN % YES



IT18. In your company, do you currently outsource services in terms of fleet management?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave



02

FINANCING METHODS

How do companies finance their fleets?



Outright/direct purchase remains the primary fleet financing method in Australia

Outright/direct purchase is the predominant financing method, employed by 49% of Australian companies. Financial leasing is employed by 22%, while operational leasing is at 10%, below the APAC average of 27%. A similar trend across vehicle types.

Operational/full-service leasing is more prevalent among large companies (20%) compared to small (7%) and medium-sized companies (10%).

A similar use of the operational/full-service leasing for second-hand vehicles

Among Australian companies using or considering second-hand vehicles, 12% use Operational leasing as their main financing method, or plan to do so if considering second-hand vehicles, below the APAC average of 28%.

The growth potential for operational leasing remains stable and moderate

In 2026, 21% of Australian companies intend to introduce or increase their use of operational leasing for fleet financing, stable below the APAC average of 37%.

The potential for consulting expertise or additional services remains limited

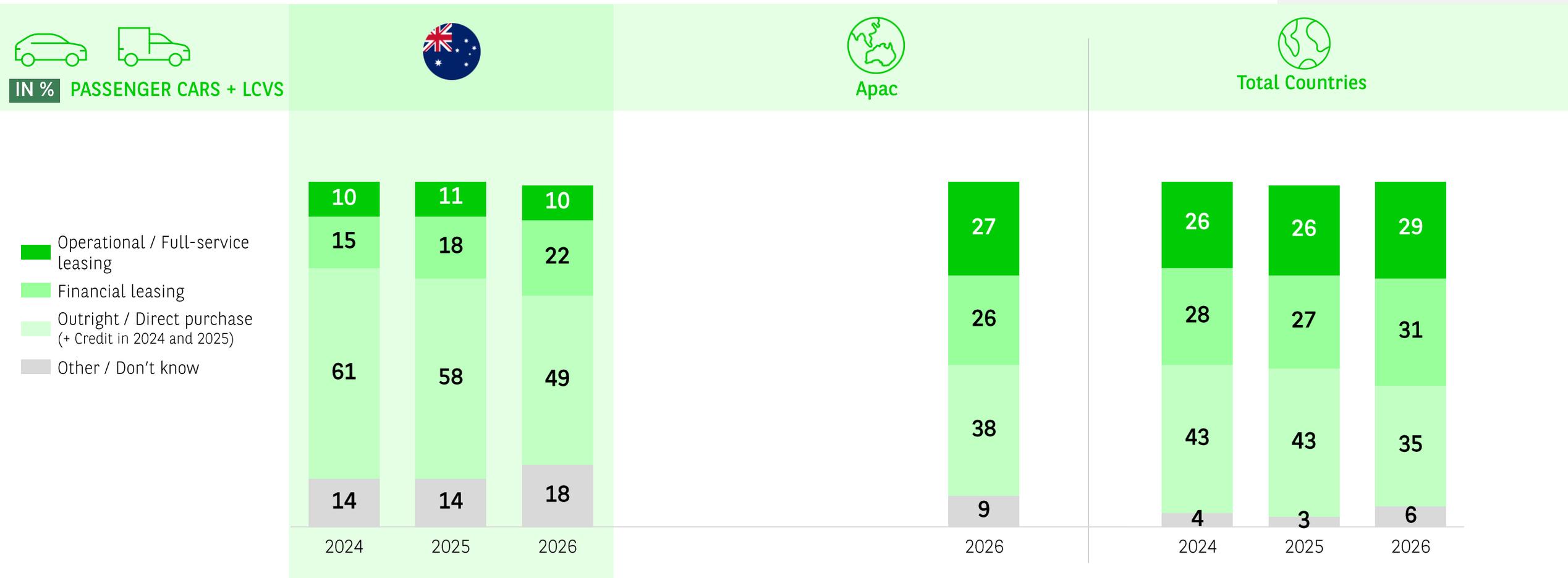
Only 9% of fleet managers surveyed show interest in consulting expertise to optimize costs and fleet management, and 18% express interest in at least one additional service or product related to fleet management. These figures remain stable

MAIN FLEET FINANCING METHOD

HOW TO READ THE RESULTS ?

In Australia in 2026, 10% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their company vehicles.

Item "Credit" deleted in 2026 – No comparison versus last waves



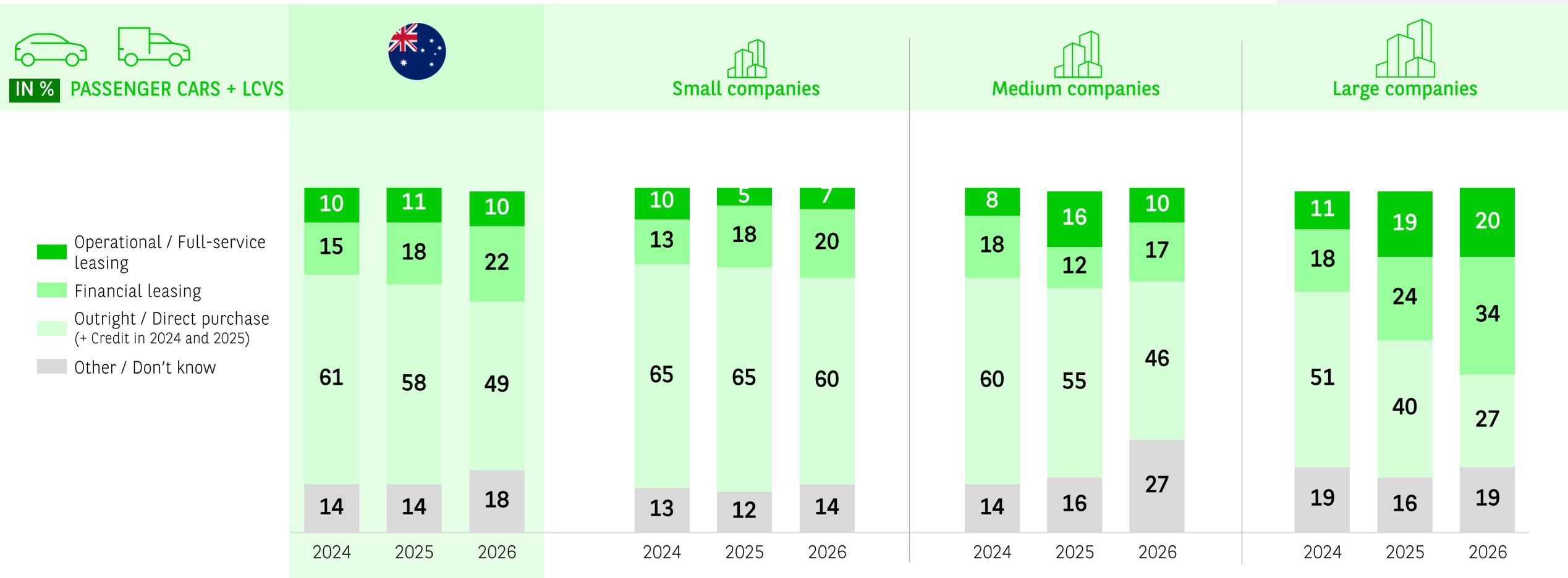
B2. What is the main method used to finance your company vehicles today?
Basis: companies with corporate vehicles = 100%

MAIN FLEET FINANCING METHOD

HOW TO READ THE RESULTS ?

In Australia in 2026, 10% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their company vehicles.

Item "Credit" deleted in 2026 - No comparison versus last waves



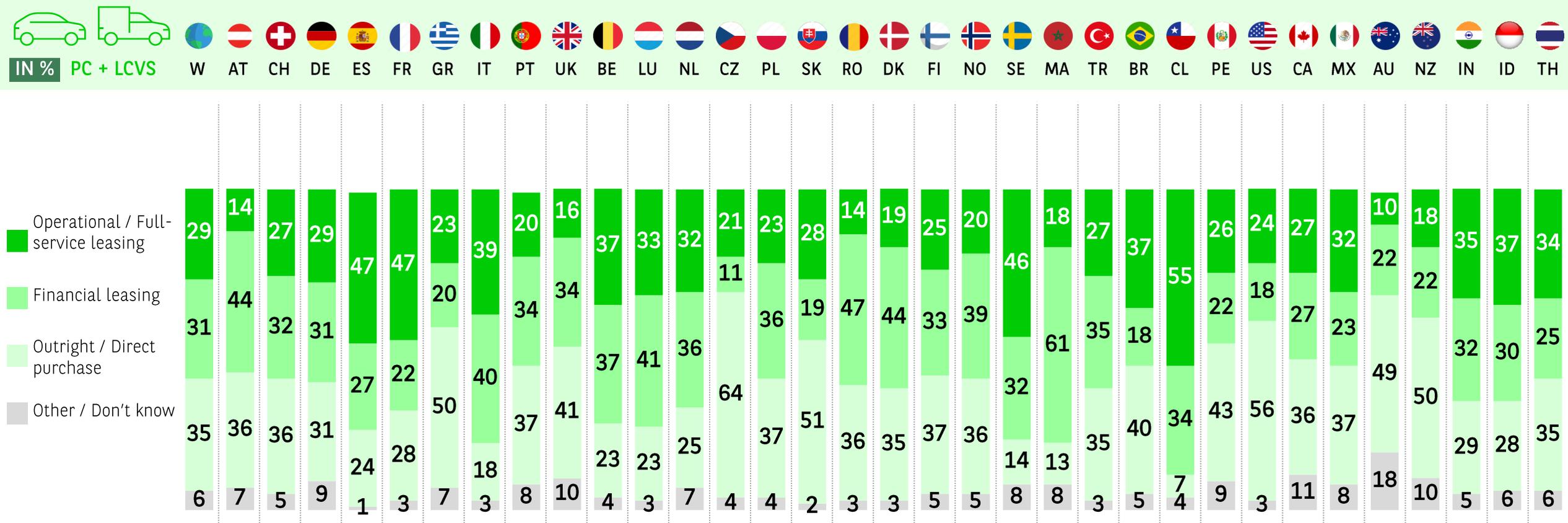
B2. What is the main method used to finance your company vehicles today?
Basis: companies with corporate vehicles = 100%

MAIN FLEET FINANCING METHOD

HOW TO READ THE RESULTS ?

In Australia in 2026, 10% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their company vehicles.

Item "Credit" deleted in 2026



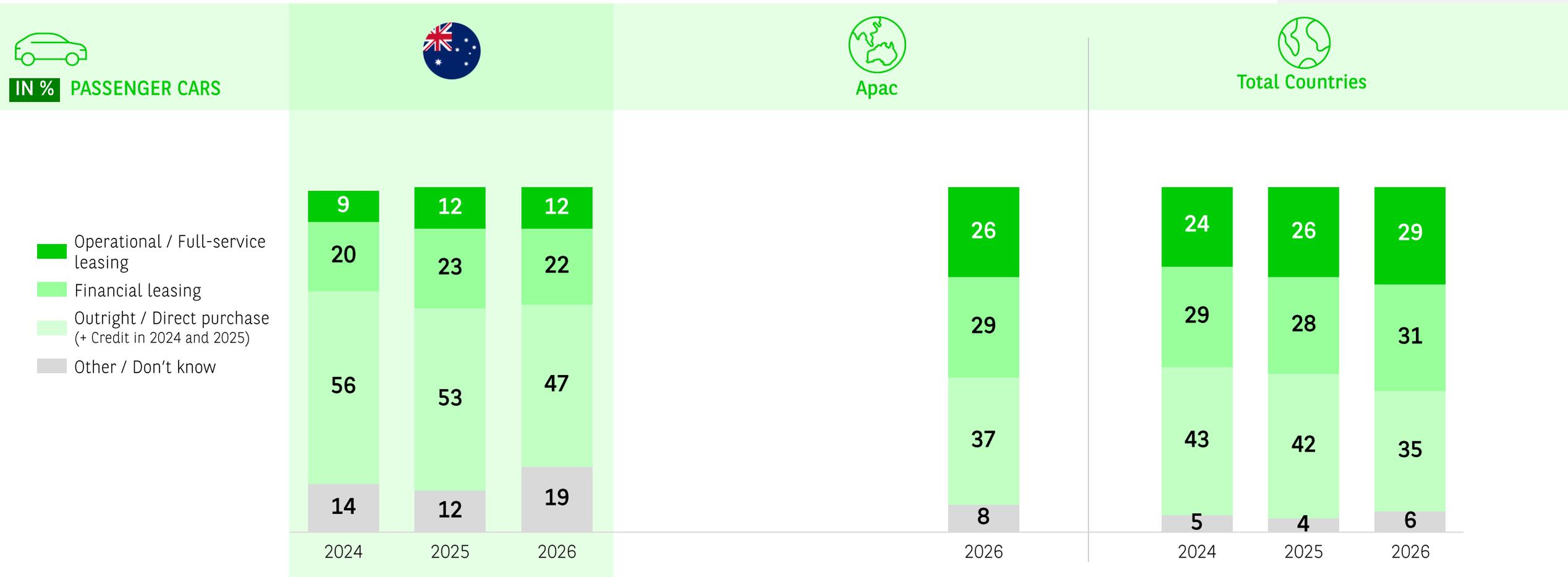
B2. What is the main method used to finance your company vehicles today?
Basis: companies with corporate vehicles = 100%

MAIN PASSENGER CARS FINANCING METHOD

HOW TO READ THE RESULTS ?

In Australia in 2026, 12% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their passenger cars.

Item "Credit" deleted in 2026 – No comparison versus last waves



B3. And what is the main method used to finance your passenger cars today?

Basis: companies with passenger cars

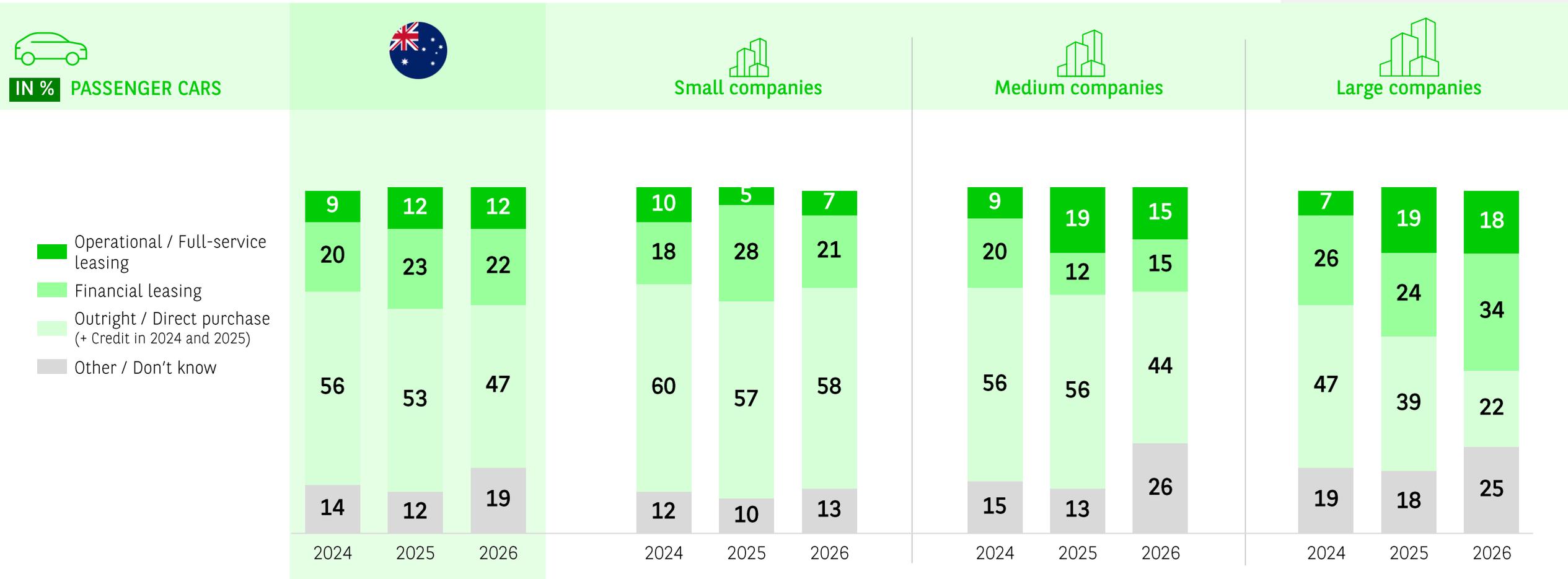


MAIN PASSENGER CARS FINANCING METHOD

HOW TO READ THE RESULTS ?

In Australia in 2026, 12% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their passenger cars.

Item "Credit" deleted in 2026 - No comparison versus last waves



B3. And what is the main method used to finance your passenger cars today?
Basis: companies with passenger cars

MAIN PASSENGER CARS FINANCING METHOD

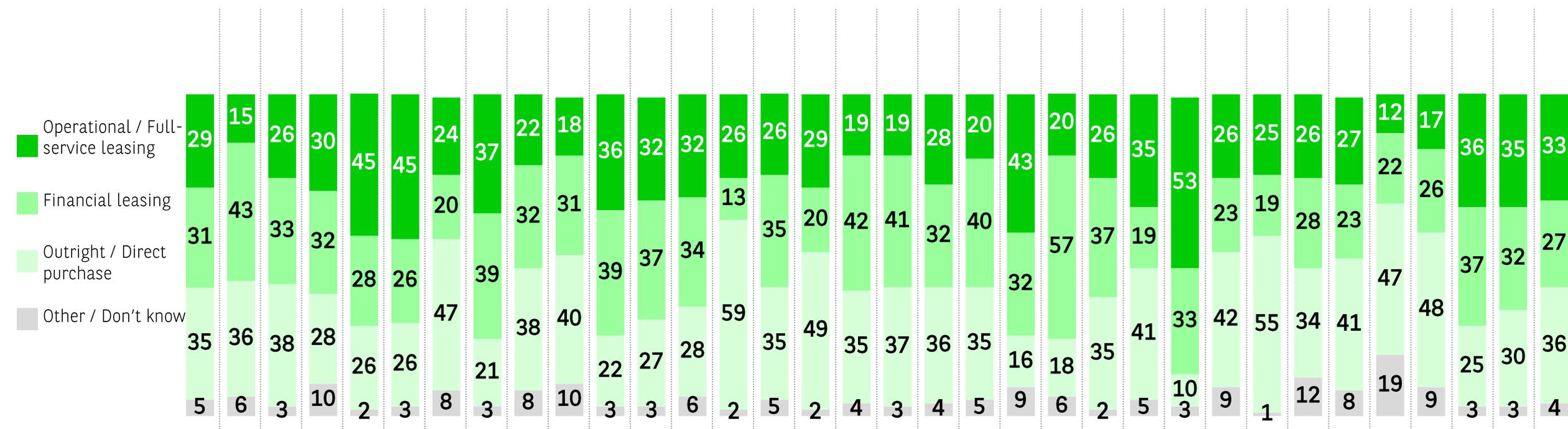
HOW TO READ THE RESULTS ?

In Australia in 2026, 12% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their passenger cars.

Item "Credit" deleted in 2026



IN % CARS



B3. And what is the main method used to finance your passenger cars today?
Basis: companies with passenger cars

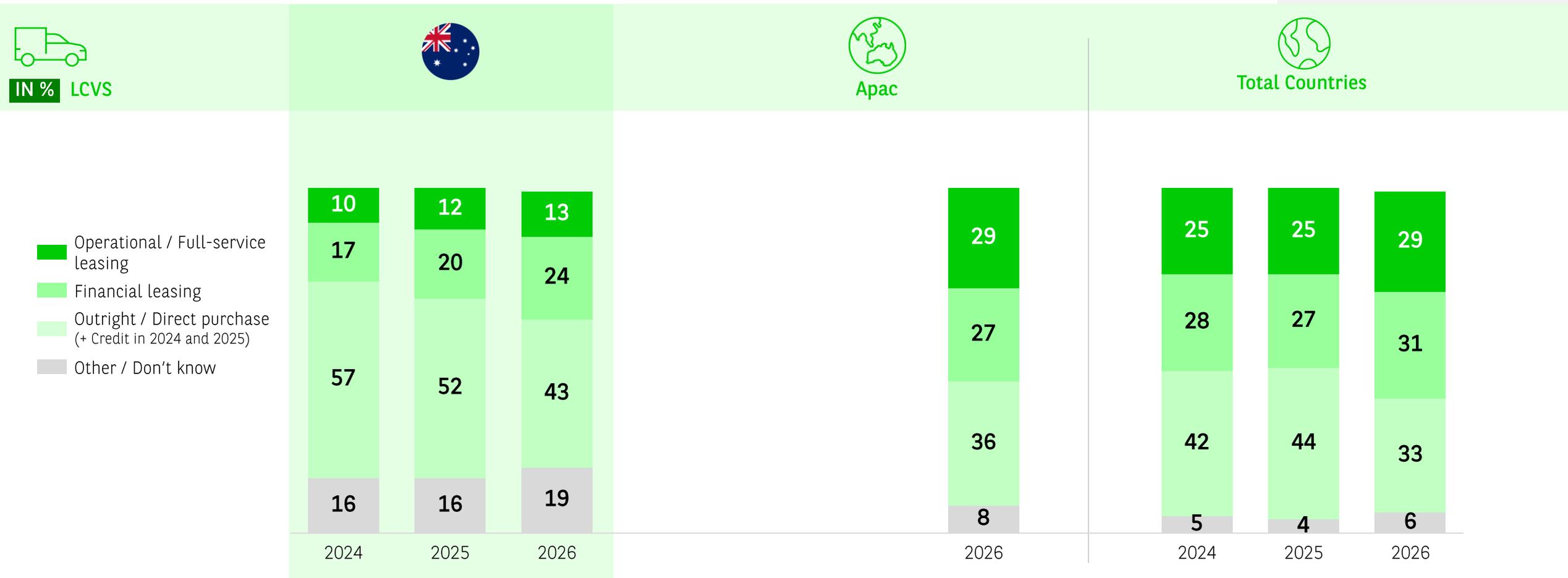


MAIN LCV FINANCING METHOD

HOW TO READ THE RESULTS ?

In Australia in 2026, 13% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their LCVs.

Item "Credit" deleted in 2026 - No comparison versus last waves



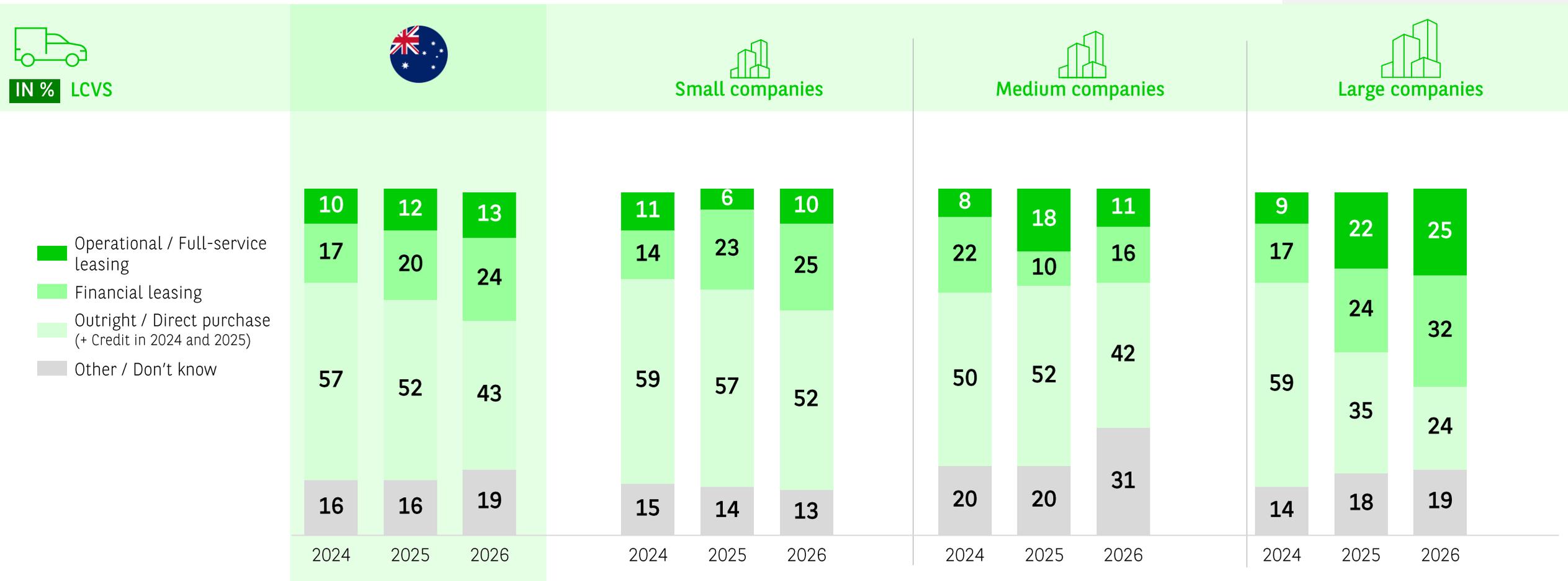
B4. And what is the main method used to finance your light commercial vehicles or vans today?
Basis: companies with LCVs

MAIN LCV FINANCING METHOD

HOW TO READ THE RESULTS ?

In Australia in 2026, 13% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their LCVs.

Item "Credit" deleted in 2026 - No comparison versus last waves



B4. And what is the main method used to finance your light commercial vehicles or vans today?
Basis: companies with LCVs

MAIN LCV FINANCING METHOD

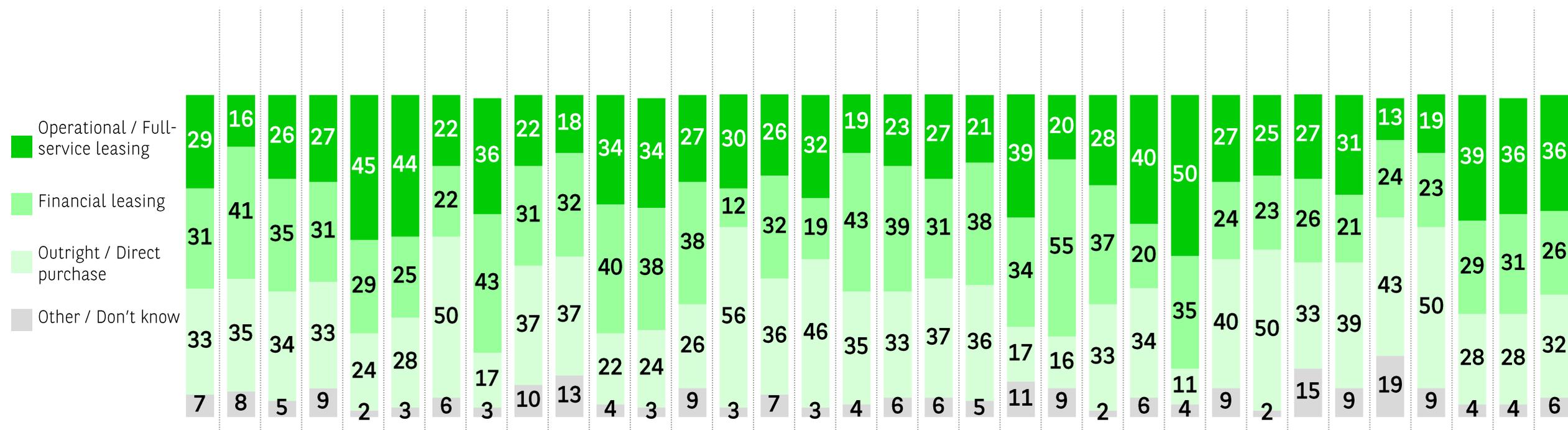
HOW TO READ THE RESULTS ?

In Australia in 2026, 13% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their LCVs.

Item "Credit" deleted in 2026



IN % LCVS



B4. And what is the main method used to finance your light commercial vehicles or vans today?
Basis: companies with LCVs

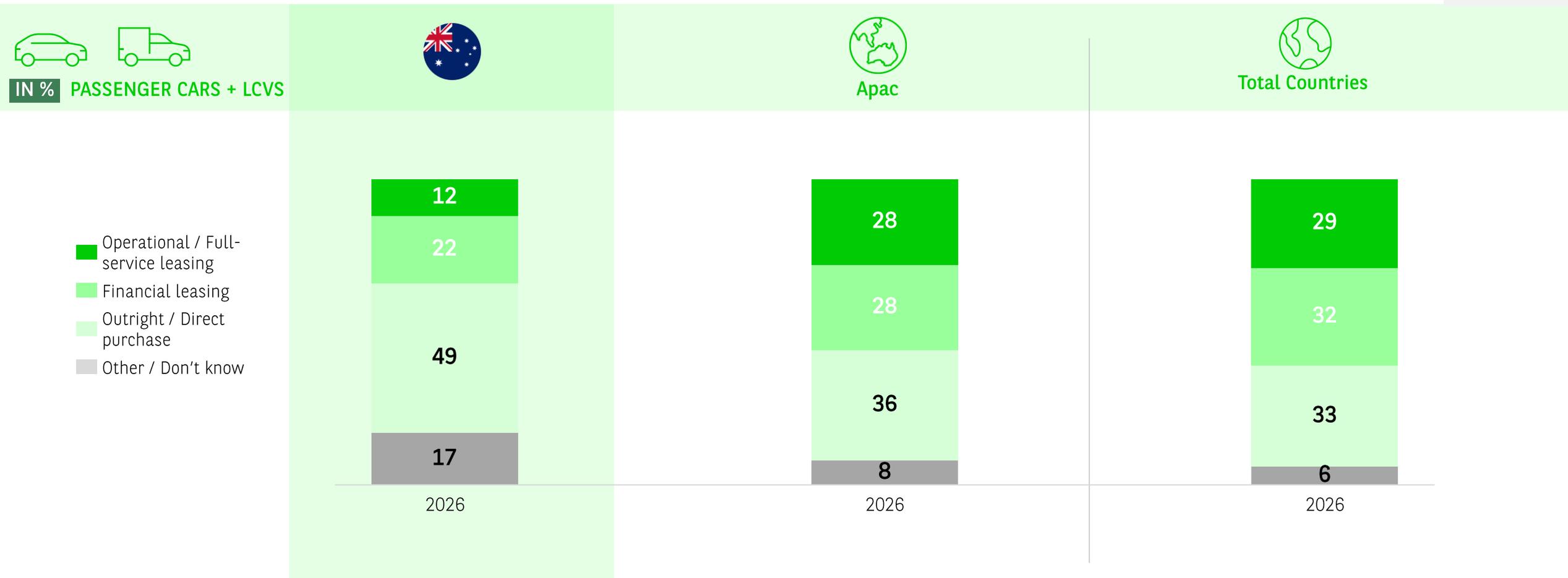


MAIN FLEET FINANCING METHOD FOR SECOND-HAND VEHICLES

HOW TO READ THE RESULTS ?

In Australia in 2026, 12% of the companies considering or having second-hand vehicles are (plan on) using Operational Leasing / Full-Service Leasing as main method to finance their company second-hand vehicles.

New question



B5. What is the (planned) main method currently used to finance the second-hand vehicles in your fleet?
Basis: companies considering or having corporate second-hand vehicles"

MAIN FLEET FINANCING METHOD FOR SECOND-HAND VEHICLES

HOW TO READ THE RESULTS ?

In Australia in 2026, 12% of the companies considering or having second-hand vehicles are (plan on) using Operational Leasing / Full-Service Leasing as main method to finance their company second-hand vehicles.

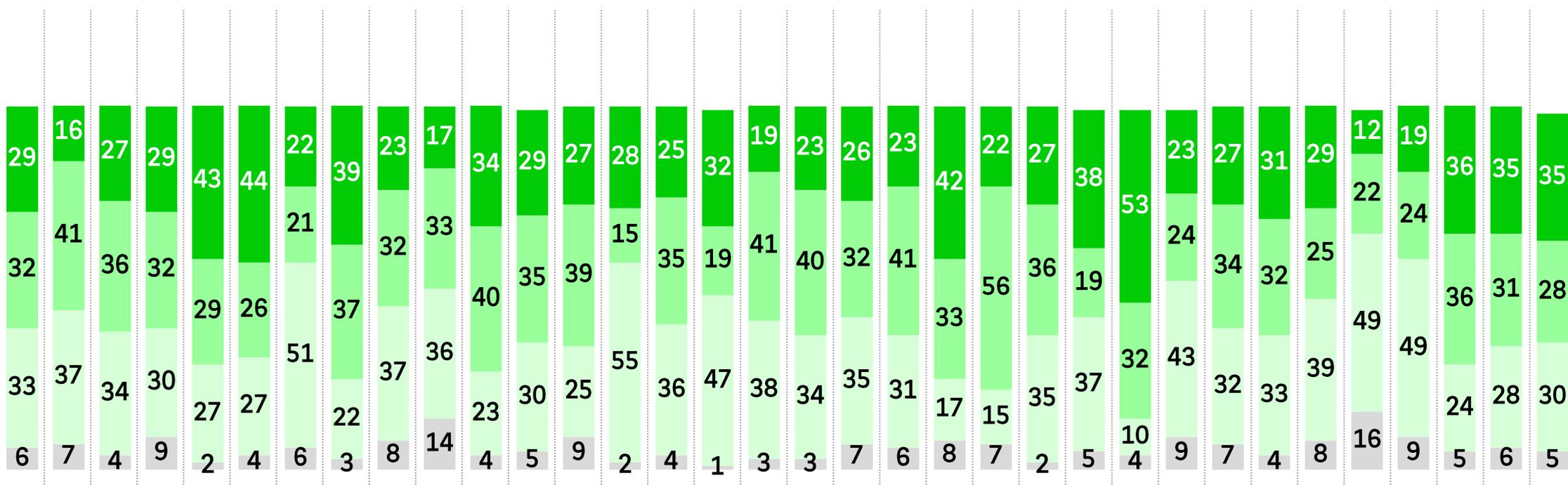
New question



IN % PC + LCVS



- Operational / Full-service leasing
- Financial leasing
- Outright / Direct purchase
- Other / Don't know



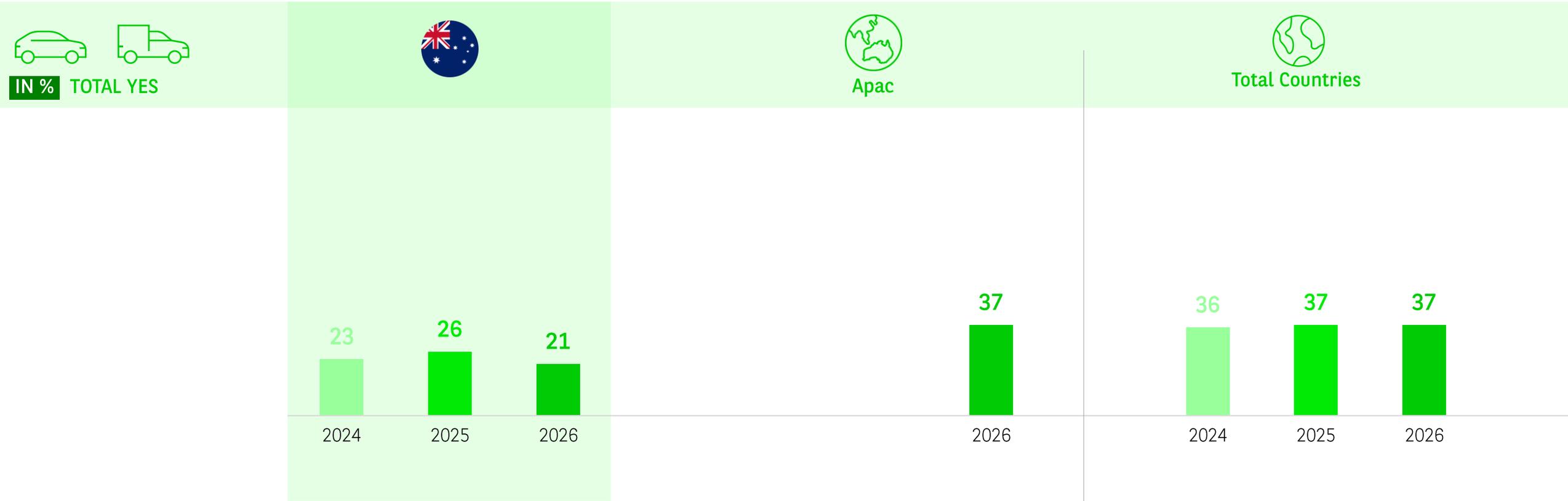
B5. What is the (planned) main method currently used to finance the second-hand vehicles in your fleet?
Basis: companies considering or having corporate second-hand vehicles"



INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATIONAL LEASING

HOW TO READ THE RESULTS ?

In Australia in 2026, 21% of the companies intend to introduce or increase the use of Operational Leasing / Full-Service Leasing to finance their corporate fleet in the next three years.



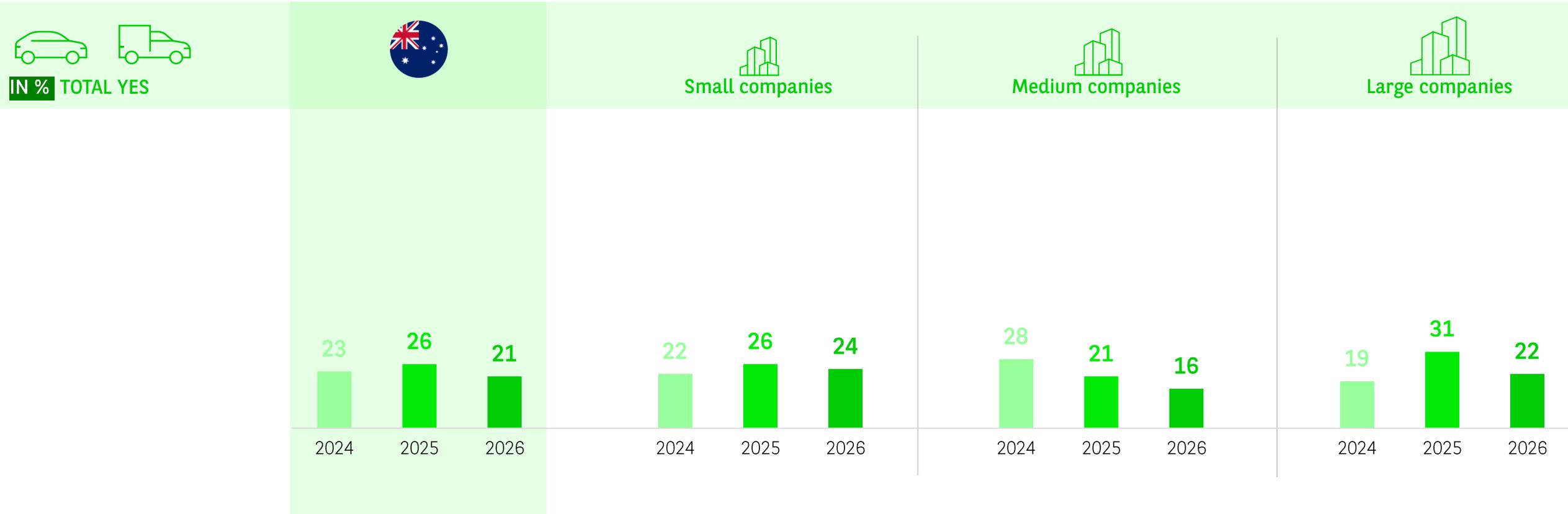
B8bis. In the next three years do you intend to either introduce or increase the use of Operational Leasing / Full-Service Leasing to finance your corporate fleet?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATIONAL LEASING

HOW TO READ THE RESULTS ?

In Australia in 2026, 21% of the companies intend to introduce or increase the use of Operational Leasing / Full-Service Leasing to finance their corporate fleet in the next three years.



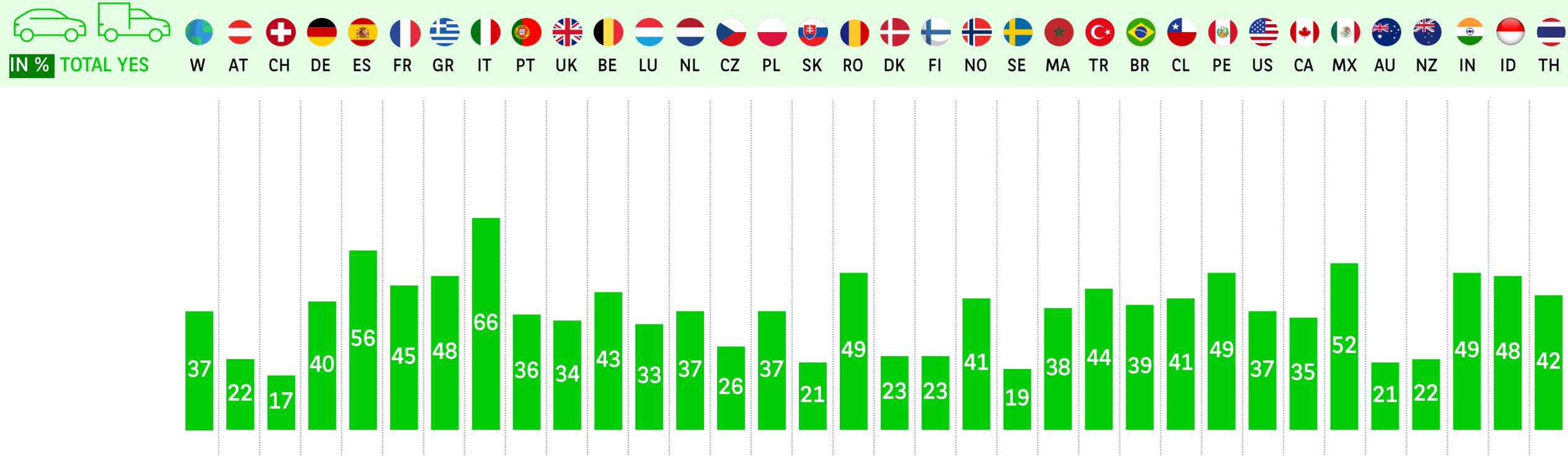
B8bis. In the next three years do you intend to either introduce or increase the use of Operational Leasing / Full-Service Leasing to finance your corporate fleet?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATIONAL LEASING

HOW TO READ THE RESULTS ?

In Australia in 2026, 21% of the companies intend to introduce or increase the use of Operational Leasing / Full-Service Leasing to finance their corporate fleet in the next three years.



B8bis. In the next three years do you intend to either introduce or increase the use of Operational leasing / Full-Service Leasing to finance your corporate fleet?

Basis: companies with corporate vehicles = 100%



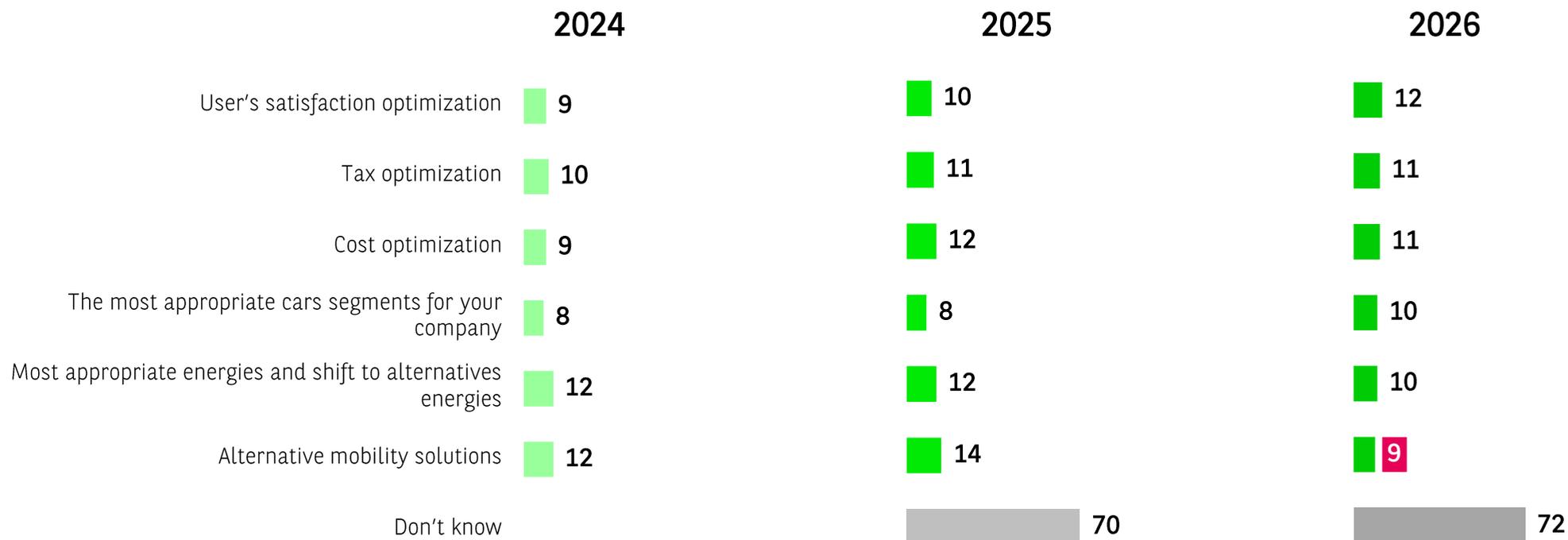
INTEREST IN ADVICE FROM EXTERNAL SUPPLIER

HOW TO READ THE RESULTS ?

In 2026, 12% of the companies would be interested in receiving advices from an external supplier on User's satisfaction optimization.

Local question

IN %



BE14. Would you be interested in receiving advices from an external supplier on the following topics?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave



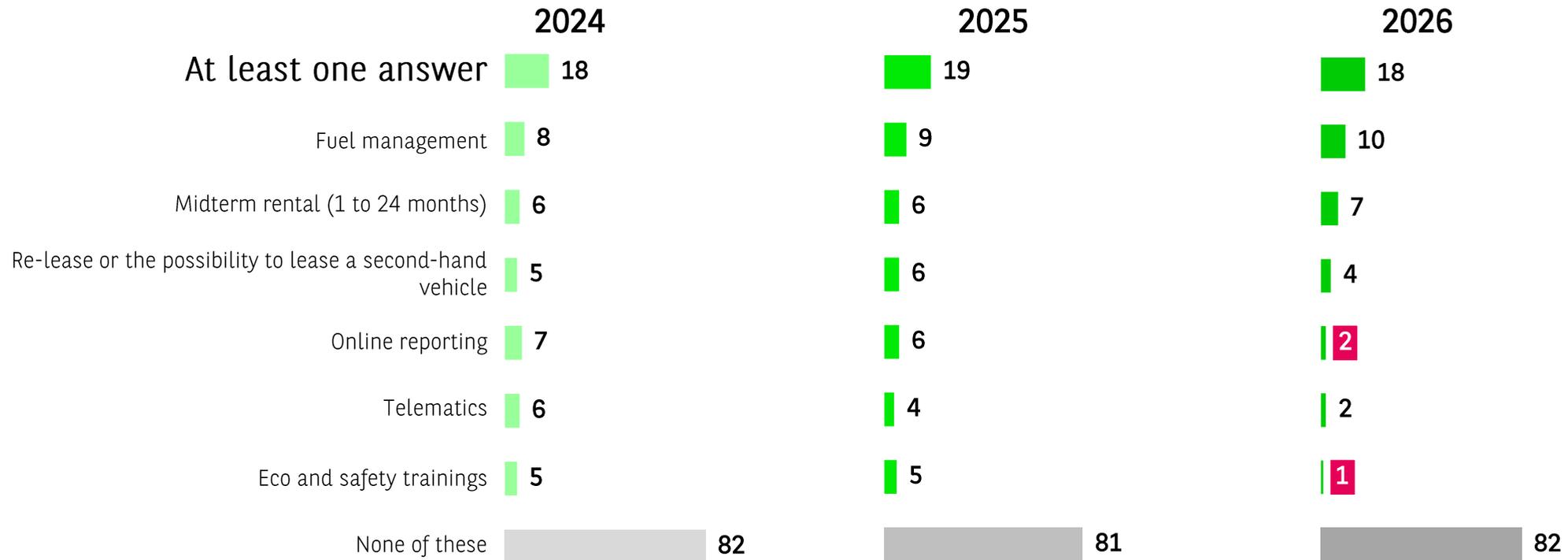
INTEREST IN ADDITIONAL SERVICES

HOW TO READ THE RESULTS ?

In 2026, 18% of the companies would be interested in at least one additional services or products concerning their fleet management. 10% of the companies would be interested in Fuel management.

Local question

IN %



TR8. Concerning your fleet management, which additional services or products would your company be interested in?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave



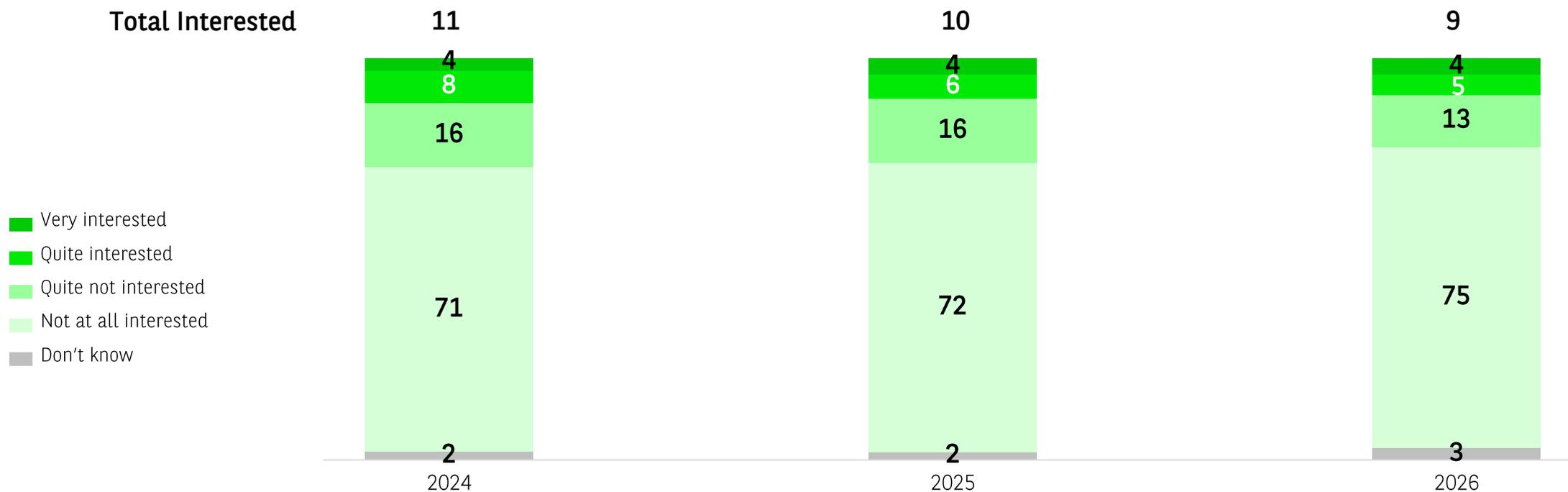
INTEREST IN CONSULTING EXPERTISE FOR COST OPTIMIZATION

HOW TO READ THE RESULTS ?

In 2026, 9% of the companies would be interested in benefiting from consulting expertise on how to optimize costs and process of fleet administration.

Local question

IN %



DE10. Would you be interested to benefit from consulting expertise on how to optimize your costs and process of your fleet administration?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

03

ENERGY MIX

What energy technologies are used?
What changes are to be expected in the near future?



A stable and significant fleet electrification in Australia

52% of Australian companies have implemented at least one type of electrified technology (HEV, PHEV, or BEV) for passenger cars. This stable level of adoption is higher than the APAC average of 31% and is primarily driven by medium-sized companies (63%), compared to small (49%) and large companies (46%). An additional 9% of Australian companies are considering the idea of implementing electrified technology for passenger cars.

Hybrid vehicles (HEVs) present the best potential for transitioning Australian passenger car fleets

In Australian companies, 36% are equipped with HEVs (up from 27% in 2024), followed by PHEVs at 15% and BEVs at 13%, maintaining stable levels compared with 2025. Although consideration for future adoption is generally low for all technologies, BEVs are the most considered at 10%.

Environmental impact remains the primary motivation for switching to electrified technologies

In 2026, the top reason for shifting to electrified technologies remains their lower environmental impact (55%), followed by reduced fuel expenses (43%).

The transition to electrified LCV fleets is a cautious process

4% of companies in Australia have adopted BEV for their LCV fleets, while 11% are considering it. This trend remains consistent across different company sizes and is aligning with the APAC average.

Lack of charging infrastructure remains the primary barrier to the broader adoption of electric vehicles

The primary constraint to broader EV adoption for passenger cars is the lack of charging points, whether on streets, at home, or in corporate settings, as cited by 61% of companies in Australia.

Companies are planning charging strategies using on-site or public charging options

Charging at the company premises is a current or future charging policy for 86% of the Australian fleets (passenger cars or LCVs), matching the APAC average. Overall, 55% have already installed charging stations or plan to within the next year.

Public charging is the second most popular option, with 67% of companies considering this approach, matching the APAC average. Among these, 63% reimburse energy costs through expense claims, 37% provide energy cards to drivers, as done in other APAC markets.

Home charging remains the least common practice, adopted by only 22% of companies. Among these companies, 81% offer or plan to offer at least one charging solution to company car drivers, such as wallboxes (47%), reinforced sockets (33%), or smart cables (26%). Additionally, 91% provide financial support for home charging, with 46% offering partial coverage, another 32% offering full coverage, and 13% providing lump-sums. Furthermore, 32% fully reimburse energy costs, while 37% offer partial reimbursement.

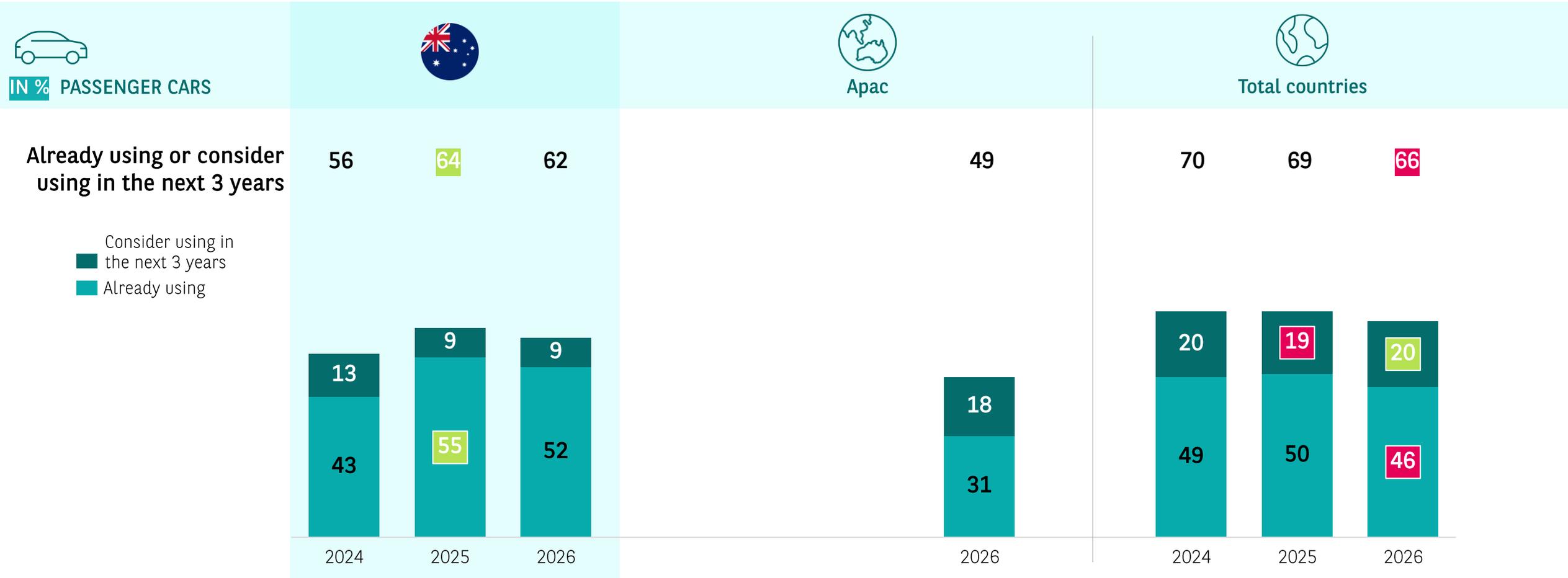
Leasing providers significantly impact energy mix decisions

Overall, 81% of Australian companies using operational or financial leasing claim that their provider influences their energy mix choices.

ELECTRIFIED VEHICLES TECHNOLOGIES USAGE AT LEAST ONE TECHNOLOGY AMONG BEV, PHEV, HEV

HOW TO READ THE RESULTS ?

In Australia in 2026, 62% of the companies with passenger cars are already using at least one electrified vehicles technology among BEV, PHEV, HEV or are considering doing so in the next 3 years.



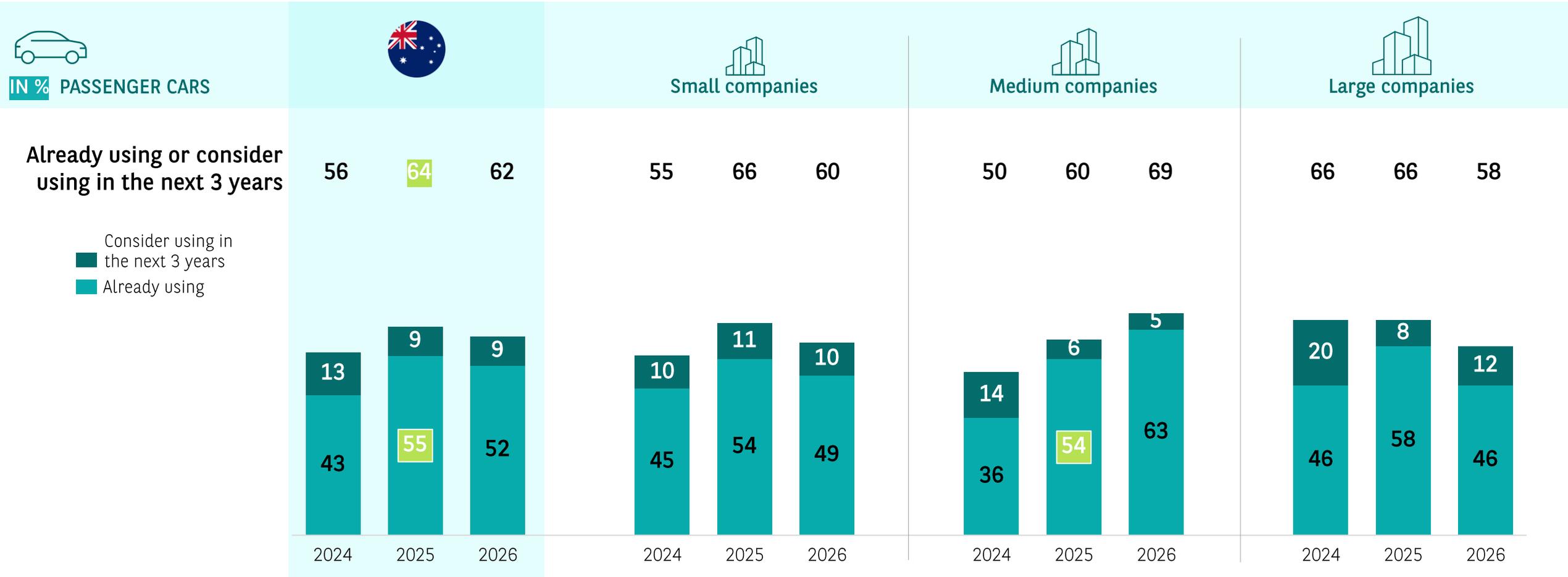
E28. Amongst the following electrified vehicles technologies, which ones do you currently use...? / E28bis. Amongst the following electrified vehicles technologies, which ones are you considering using...? Basis: companies with passenger cars

X% Significantly higher / lower vs. previous wave

ELECTRIFIED VEHICLES TECHNOLOGIES USAGE AT LEAST ONE TECHNOLOGY AMONG BEV, PHEV, HEV

HOW TO READ THE RESULTS ?

In Australia in 2026, 62% of the companies with passenger cars are already using at least one electrified vehicles technology among BEV, PHEV, HEV or are considering doing so in the next 3 years.



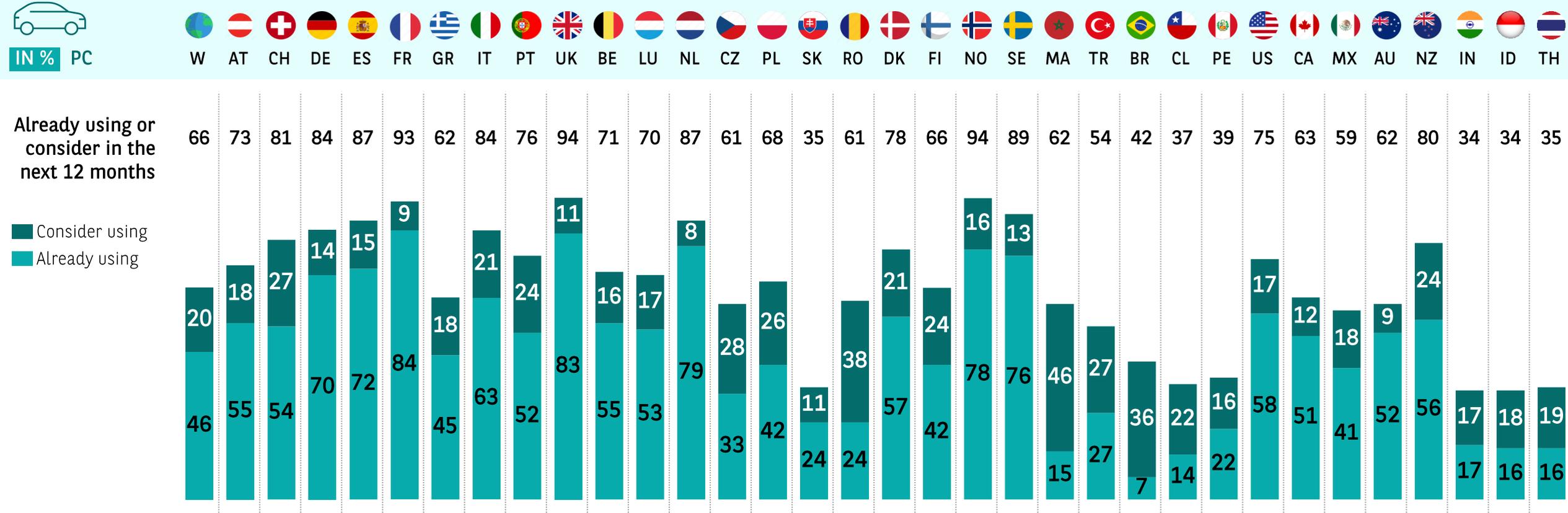
E28. Amongst the following electrified vehicles technologies, which ones do you currently use...? /
 E28bis. Amongst the following electrified vehicles technologies, which ones are you considering using...?
 Basis: companies with passenger cars

X% Significantly higher / lower vs. previous wave

ELECTRIFIED VEHICLES TECHNOLOGIES USAGE AT LEAST ONE TECHNOLOGY AMONG BEV, PHEV, HEV

HOW TO READ THE RESULTS ?

In Australia in 2026, 62% of the companies with passenger cars are already using at least one electrified vehicles technology among BEV, PHEV, HEV or are considering doing so in the next 3 years.



E28. Amongst the following electrified vehicles technologies, which ones do you currently use...? /
 E28bis. Amongst the following electrified vehicles technologies, which ones are you considering using...?
 Basis: companies with passenger cars

ELECTRIFIED VEHICLES TECHNOLOGIES USAGE

DETAIL PER TECHNOLOGY

HOW TO READ THE RESULTS ?

In Australia in 2026, 23% of the companies with passenger cars are already using BEV or are considering using it in the next three years.



E28. Amongst the following electrified vehicles technologies, which ones do you currently use...?
 E28bis. Amongst the following electrified vehicles technologies, which ones are you considering using...?
 Basis: companies with passenger cars

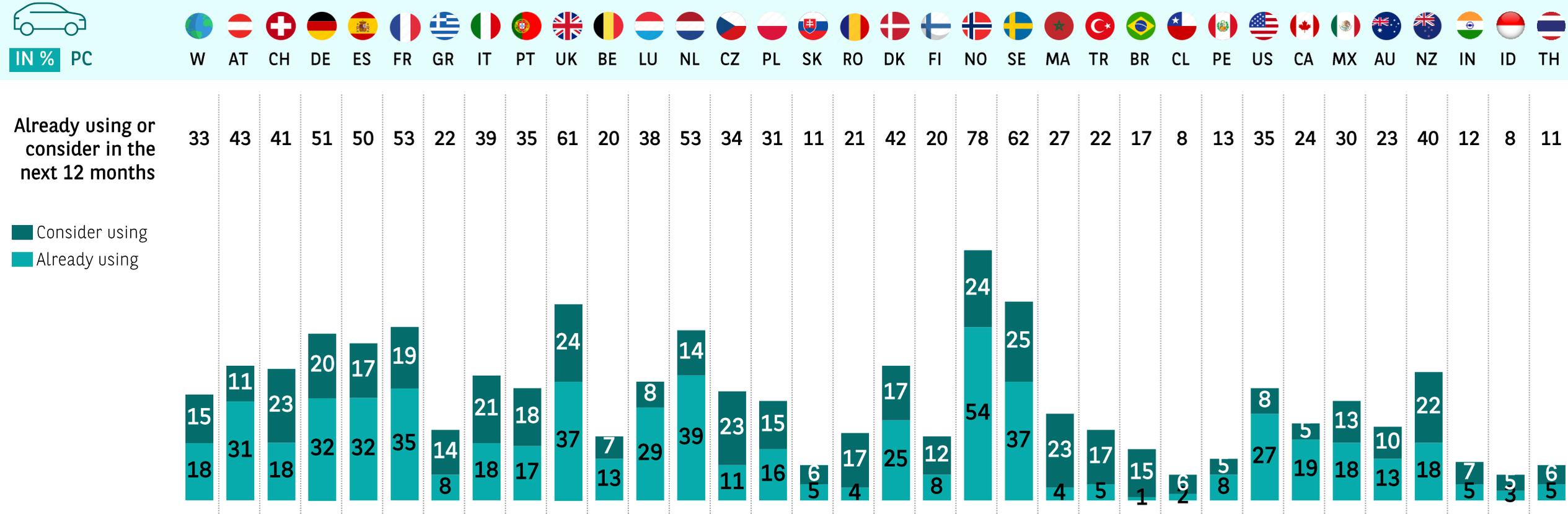
X% Significantly higher / lower vs. previous wave

ELECTRIFIED VEHICLES TECHNOLOGIES USAGE

FOCUS ON BEV

HOW TO READ THE RESULTS ?

In Australia in 2026, 23% of the companies with passenger cars are already using BEV or are considering using it in the next three years.



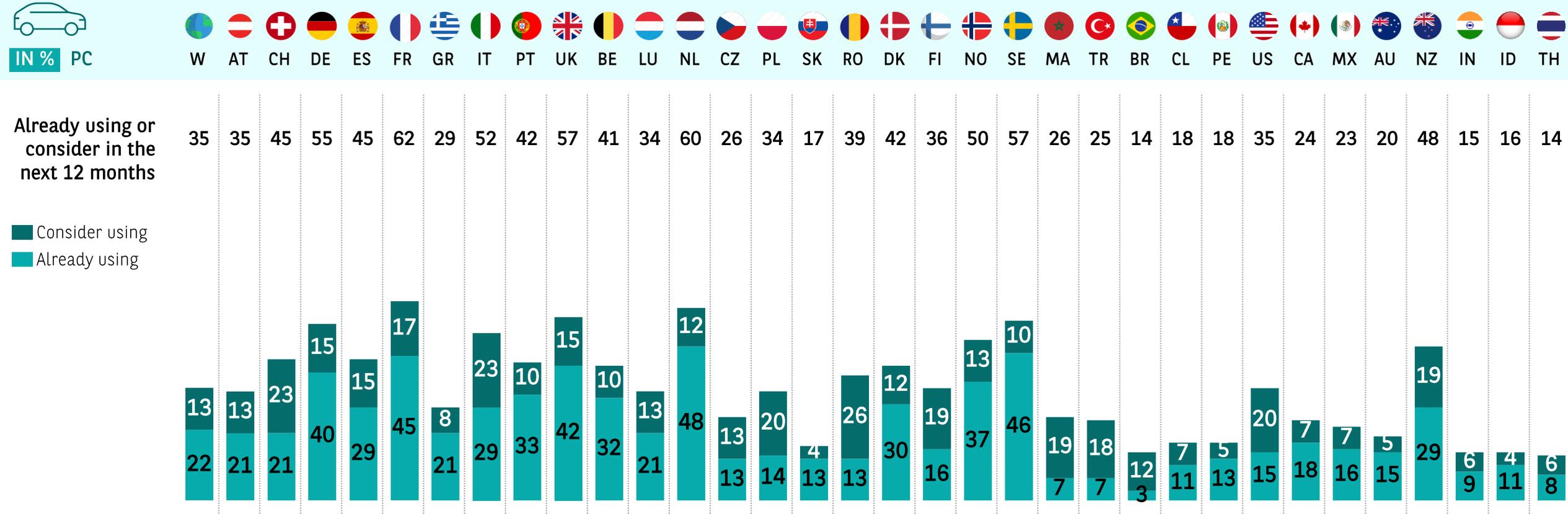
E28. Amongst the following electrified vehicles technologies, which ones do you currently use...?
 E28bis. Amongst the following electrified vehicles technologies, which ones are you considering using...?
 Basis: companies with passenger cars

ELECTRIFIED VEHICLES TECHNOLOGIES USAGE

FOCUS ON PHEV

HOW TO READ THE RESULTS ?

In Australia in 2026, 20% of the companies with passenger cars are already using PHEV or are considering using it in the next three years.



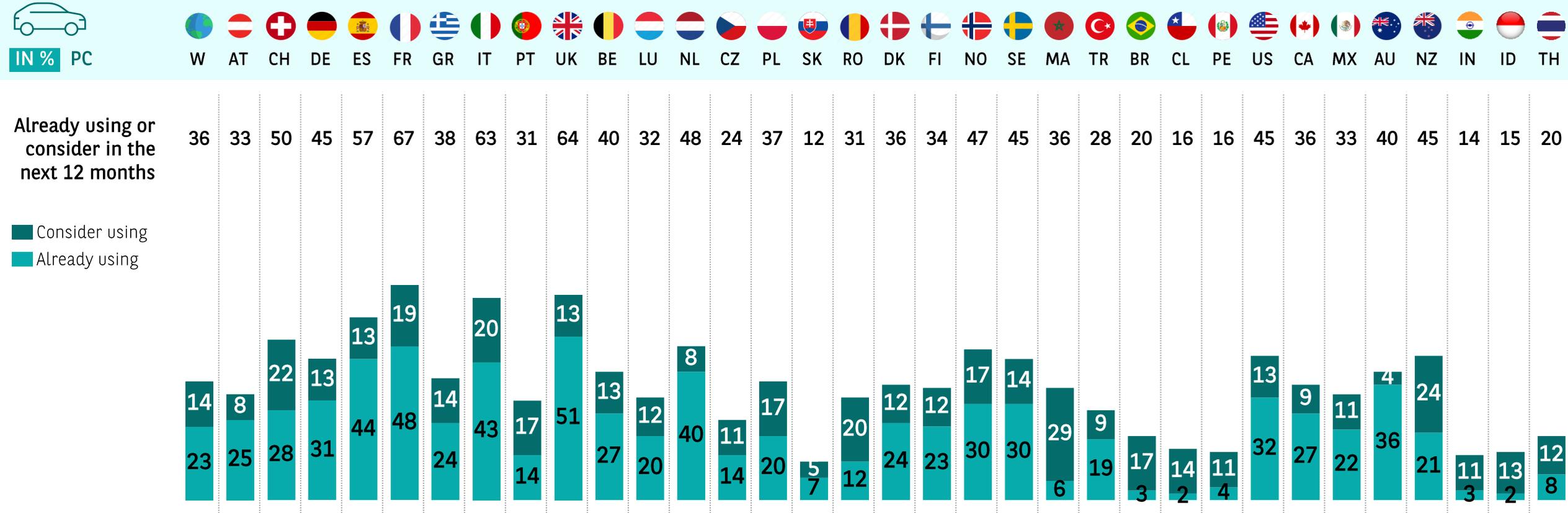
E28. Amongst the following electrified vehicles technologies, which ones do you currently use...?
 E28bis. Amongst the following electrified vehicles technologies, which ones are you considering using...?
 Basis: companies with passenger cars

ELECTRIFIED VEHICLES TECHNOLOGIES USAGE

FOCUS ON HEV

HOW TO READ THE RESULTS ?

In Australia in 2026, 40% of the companies with passenger cars are already using HEV or are considering using it in the next three years.



E28. Amongst the following electrified vehicles technologies, which ones do you currently use...?
 E28bis. Amongst the following electrified vehicles technologies, which ones are you considering using...?
 Basis: companies with passenger cars

REASONS FOR IMPLEMENTING ELECTRIFIED VEHICLES TECHNOLOGIES FOR PASSENGER CARS

HOW TO READ THE RESULTS ?

In Australia in 2026, 55% of the companies with passenger cars are already using electrified vehicles technologies or are considering it Because of their lower environmental impact.



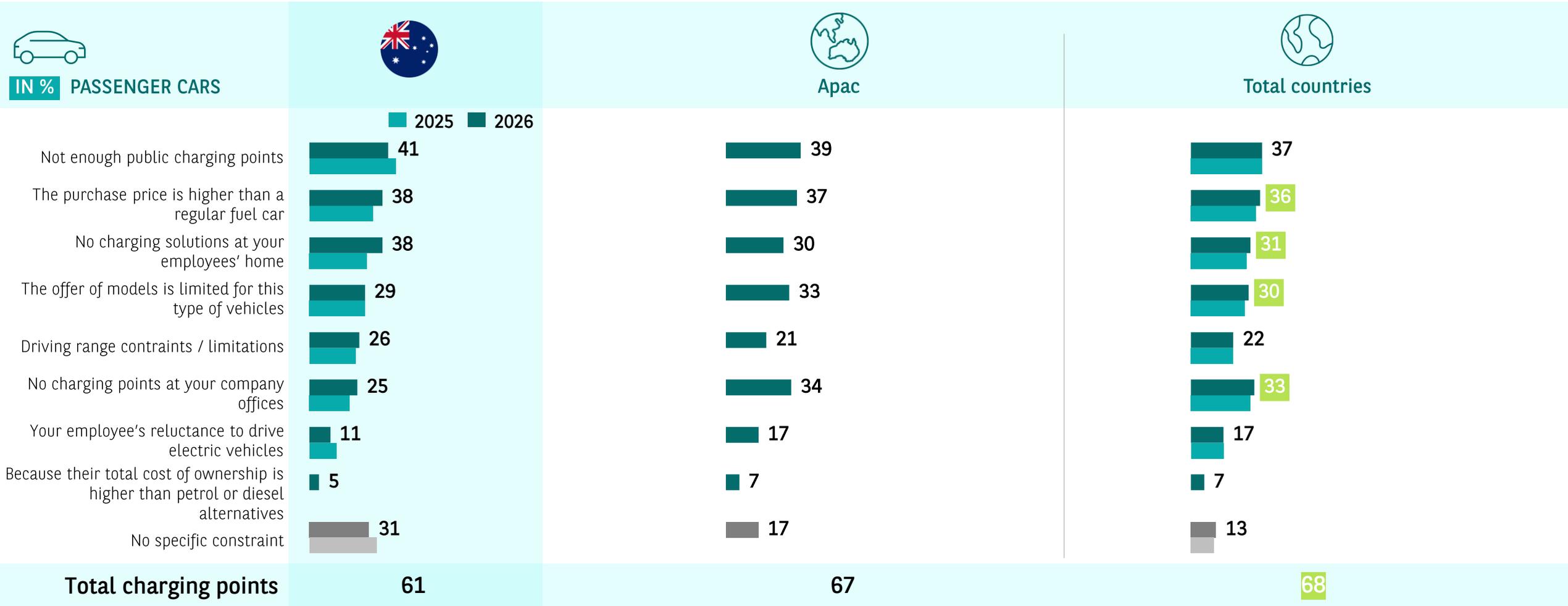
E28A. Why have you already implemented or why do you consider implementing these electrified vehicles technologies?
Basis: companies that are already using or considering using electrified vehicles technologies for passenger cars

X% Significantly higher / lower vs. previous wave

CONSTRAINTS FOR USING ELECTRIC PASSENGER CARS

HOW TO READ THE RESULTS ?

In Australia in 2026, 41% of the companies with passenger cars declare that the main constraint for using electric passenger cars is: Not enough public charging points. And 61% of the companies mention at least one reason related to charging points.



E28B_1. What are the constraints of using electric passenger cars (Battery Electric Vehicles)?
Basis: companies with PCs and aware of EV technology

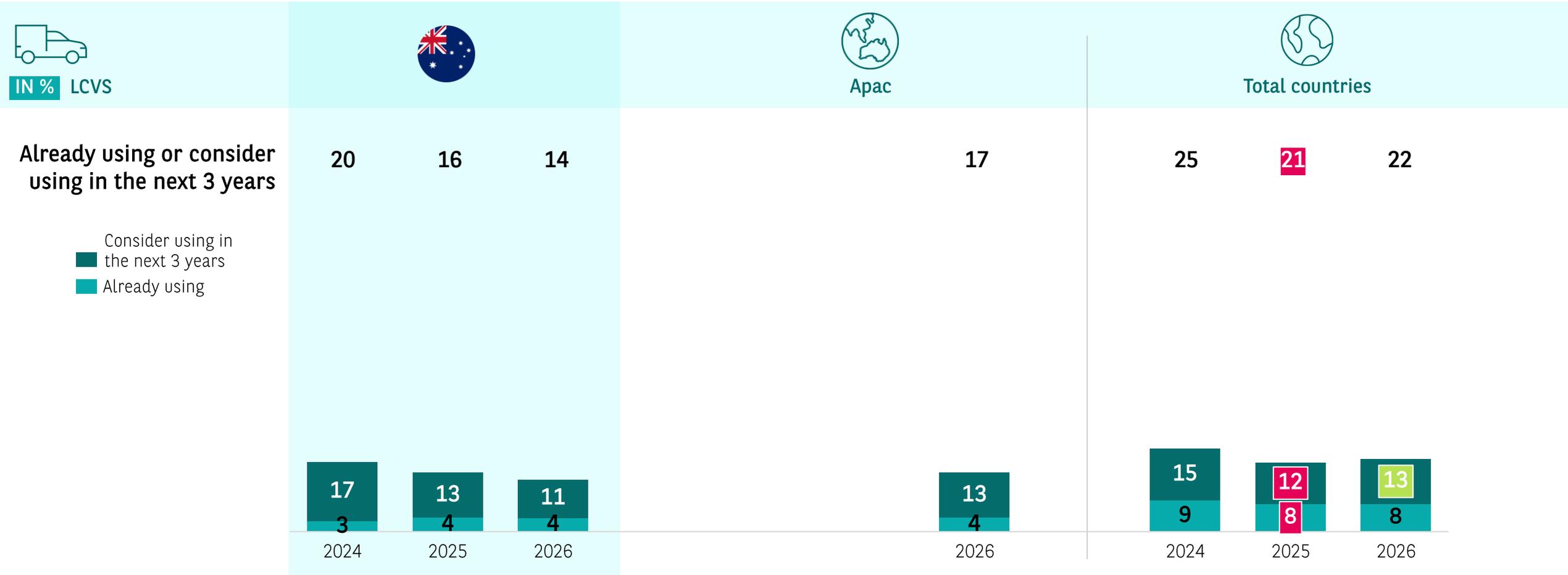
X% Significantly higher / lower vs. previous wave

ELECTRIFIED VEHICLES TECHNOLOGIES USAGE

FOCUS ON BEV

HOW TO READ THE RESULTS ?

In Australia in 2026, 14% of the companies with LCVs are already using BEV or are considering doing so in the next 3 years.



E28. Amongst the following electrified vehicles technologies, which ones do you currently use...?
 E28bis. Amongst the following electrified vehicles technologies, which ones are you considering using...?
 Basis: companies with LCVs

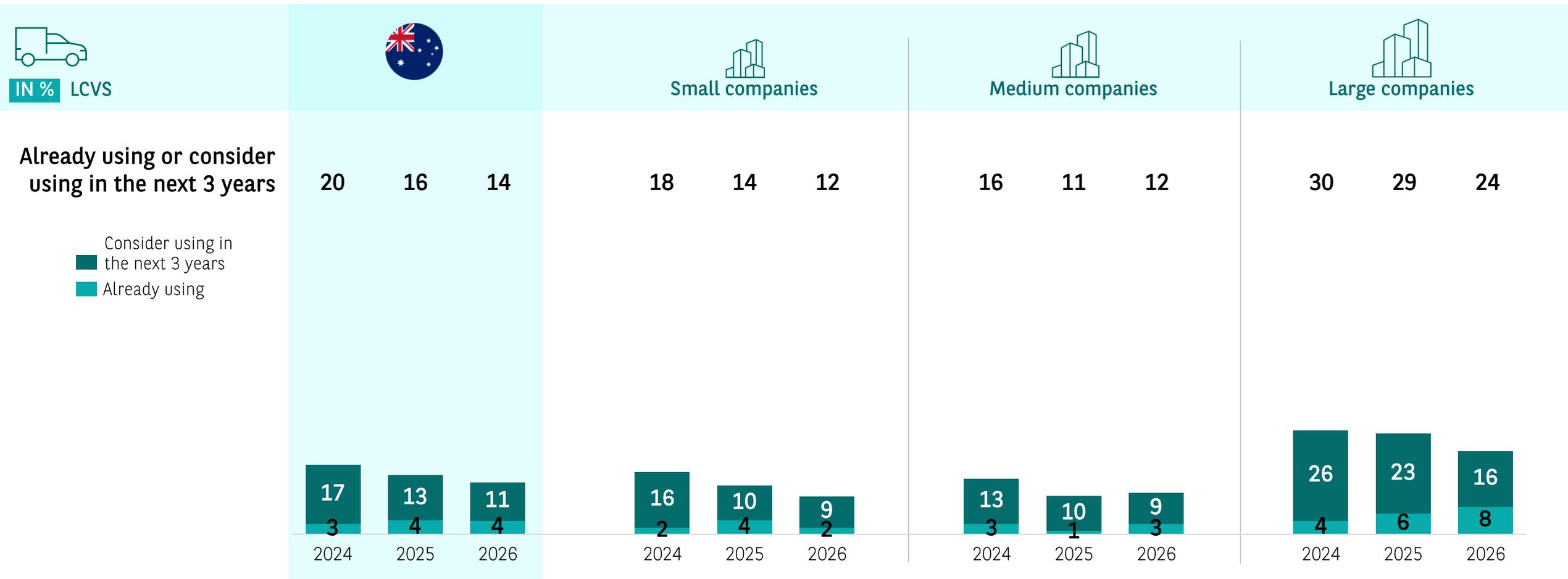
X% Significantly higher / lower vs. previous wave

ELECTRIFIED VEHICLES TECHNOLOGIES USAGE

FOCUS ON BEV

HOW TO READ THE RESULTS ?

In Australia in 2026, 14% of the companies with LCVs are already using BEV or are considering doing so in the next 3 years.



E28. Amongst the following electrified vehicles technologies, which ones do you currently use...?
 E28bis. Amongst the following electrified vehicles technologies, which ones are you considering using...?
 Basis: companies with LCVs

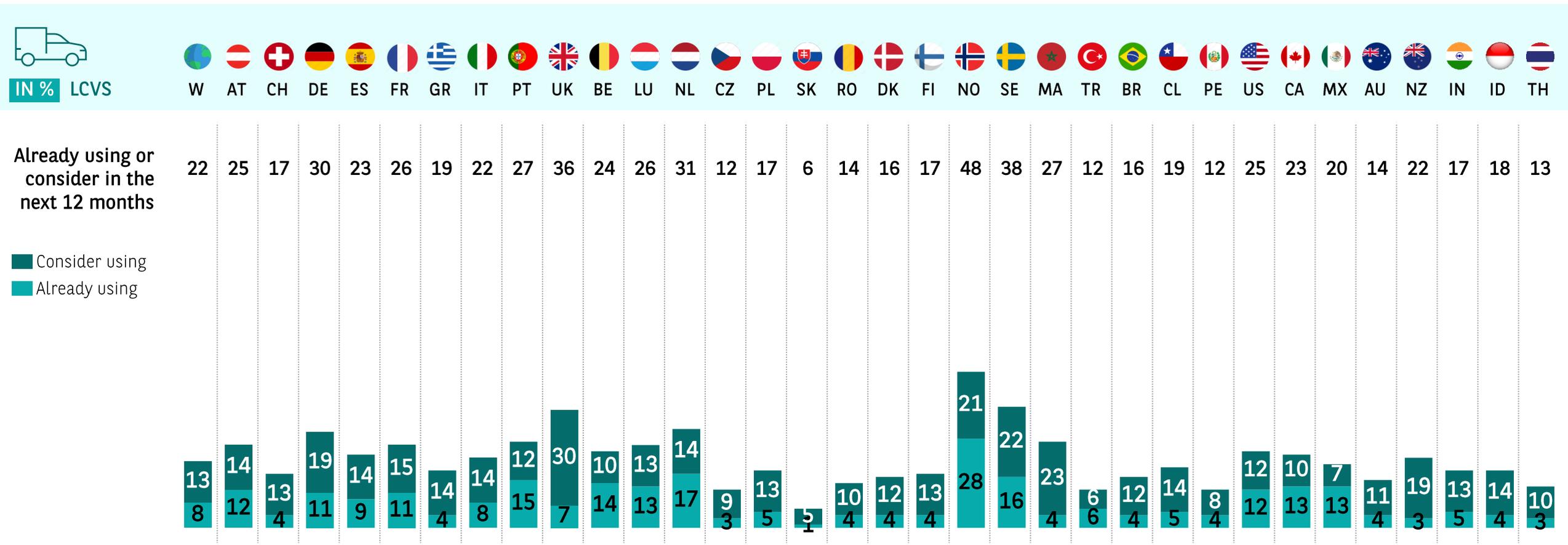
X% Significantly higher / lower vs. previous wave

ELECTRIFIED VEHICLES TECHNOLOGIES USAGE

FOCUS ON BEV

HOW TO READ THE RESULTS ?

In Australia in 2026, 14% of the companies with LCVs are already using BEV or are considering using it in the next three years.

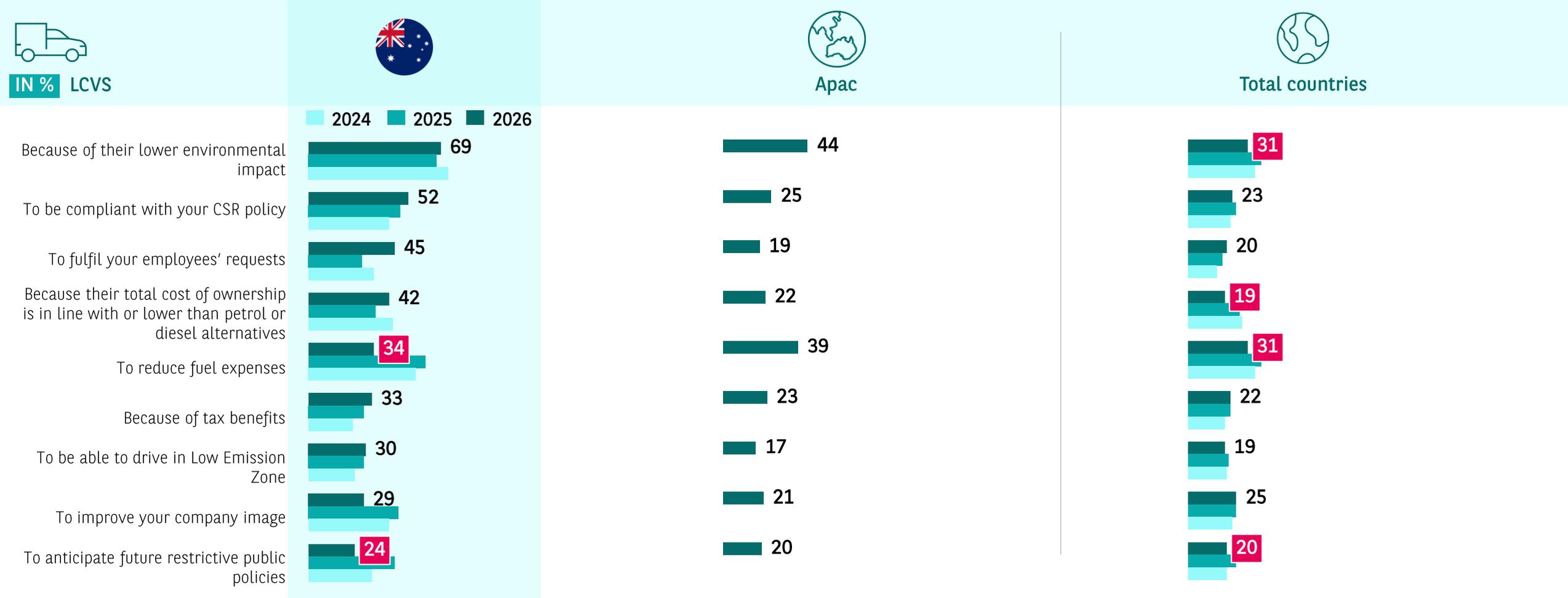


E28. Amongst the following electrified vehicles technologies, which ones do you currently use...?
 E28bis. Amongst the following electrified vehicles technologies, which ones are you considering using...?
 Basis: companies with LCVs

REASONS FOR IMPLEMENTING ELECTRIFIED VEHICLES TECHNOLOGIES FOR LCVS

HOW TO READ THE RESULTS ?

In Australia in 2026, 69% of the companies with LCVs are already using electrified vehicles technologies or are considering it. Because of their lower environmental impact.



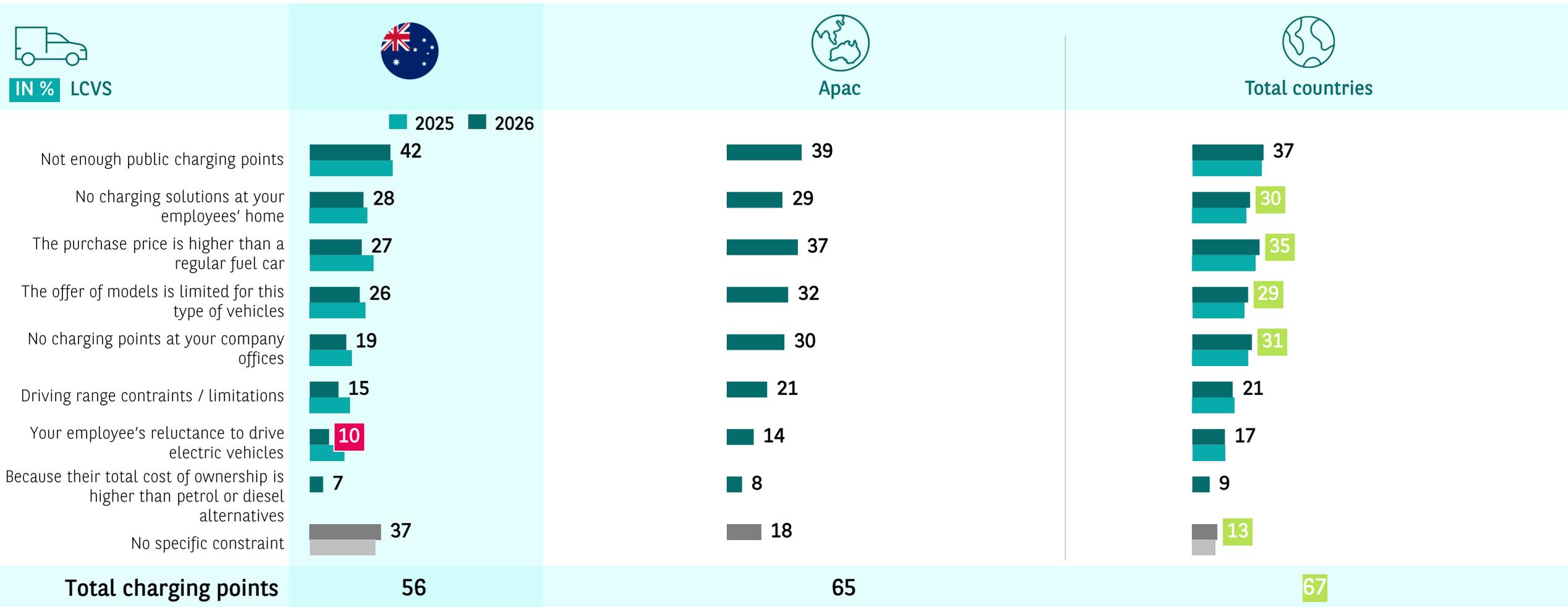
E28A. Why have you already implemented or why do you consider implementing these electrified vehicles technologies?
Basis: companies that are already using or considering using electrified vehicles technologies for LCVs

X% Significantly higher / lower vs. previous wave

CONSTRAINTS FOR USING ELECTRIC LIGHT COMMERCIAL VEHICLES

HOW TO READ THE RESULTS ?

In Australia in 2026, 42% of the companies with LCVs declare that the main constraint for using electric LCVs is: Not enough public charging points. And 56% of the companies mention at least one reason related to charging points.



E28B_2. What are the constraints of using electric light commercial vehicles (Battery Electric Vehicles)?
Basis: companies with LCVs and aware of EV technology

X% Significantly higher/lower vs. previous wave

HOW TO READ THE RESULTS ?

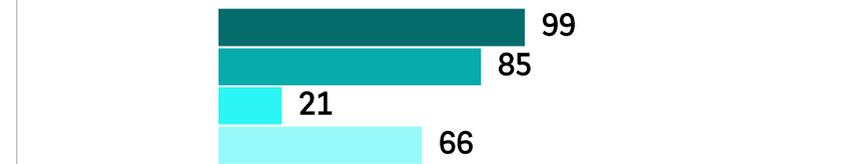
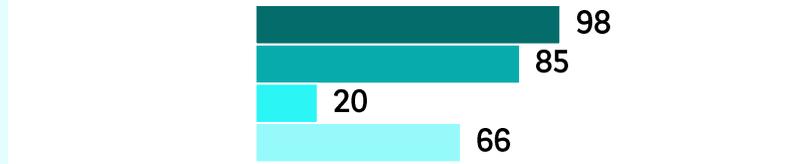
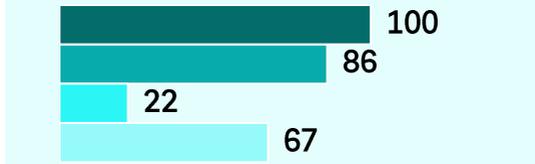
In Australia in 2026, 100% of the companies have at least one charging policy or will have in the future for all vehicles.

New question



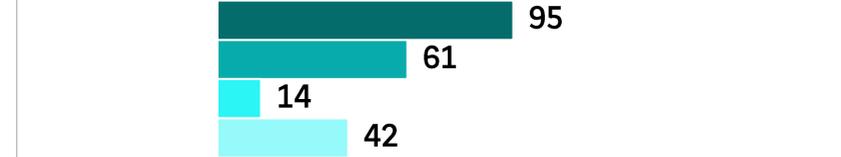
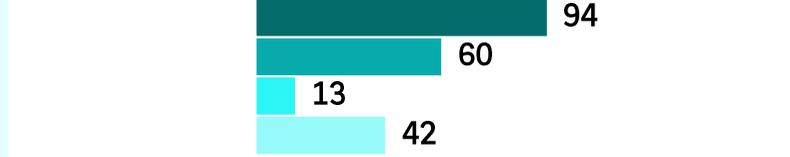
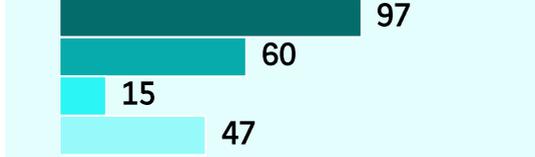
All vehicles

At least one charging policy
 At the company's premises
 At home
 Public charging



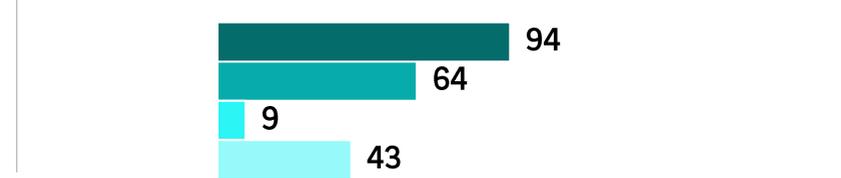
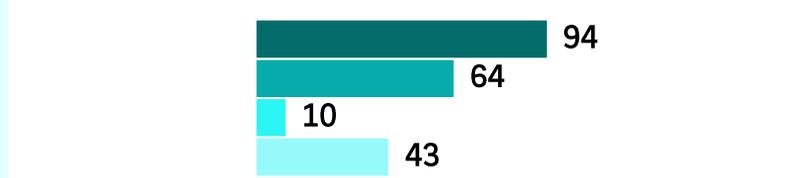
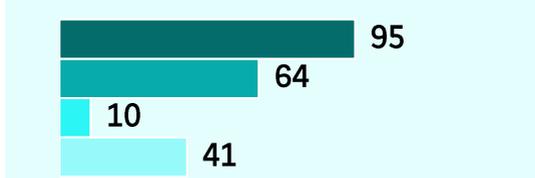
Passenger cars

At least one charging policy
 At the company's premises
 At home
 Public charging



LCV

At least one charging policy
 At the company's premises
 At home
 Public charging

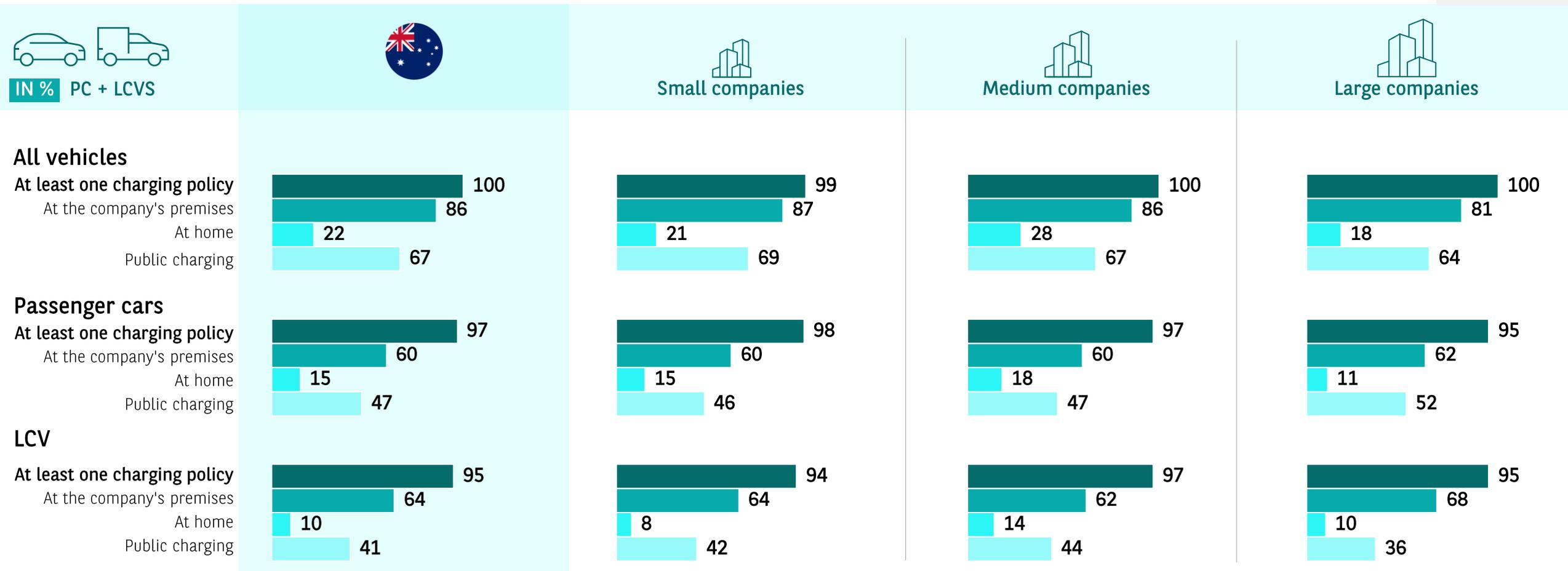


E31. What charging policy does your company currently use, or what policy will it use in the future?
 Basis: companies with corporate vehicles = 100%

HOW TO READ THE RESULTS ?

In Australia in 2026, 100% of the companies have at least one charging policy or will have in the future for all vehicles.

New question



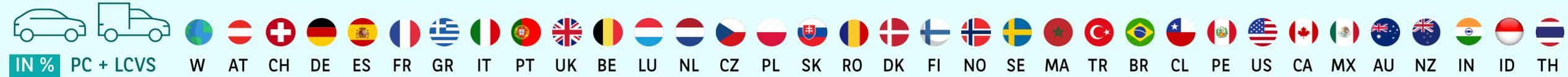
E31. What charging policy does your company currently use, or what policy will it use in the future?

Basis: companies with corporate vehicles = 100%

HOW TO READ THE RESULTS ?

In Australia in 2026, 100% of the companies have at least one charging policy or will have in the future for all vehicles.

New question



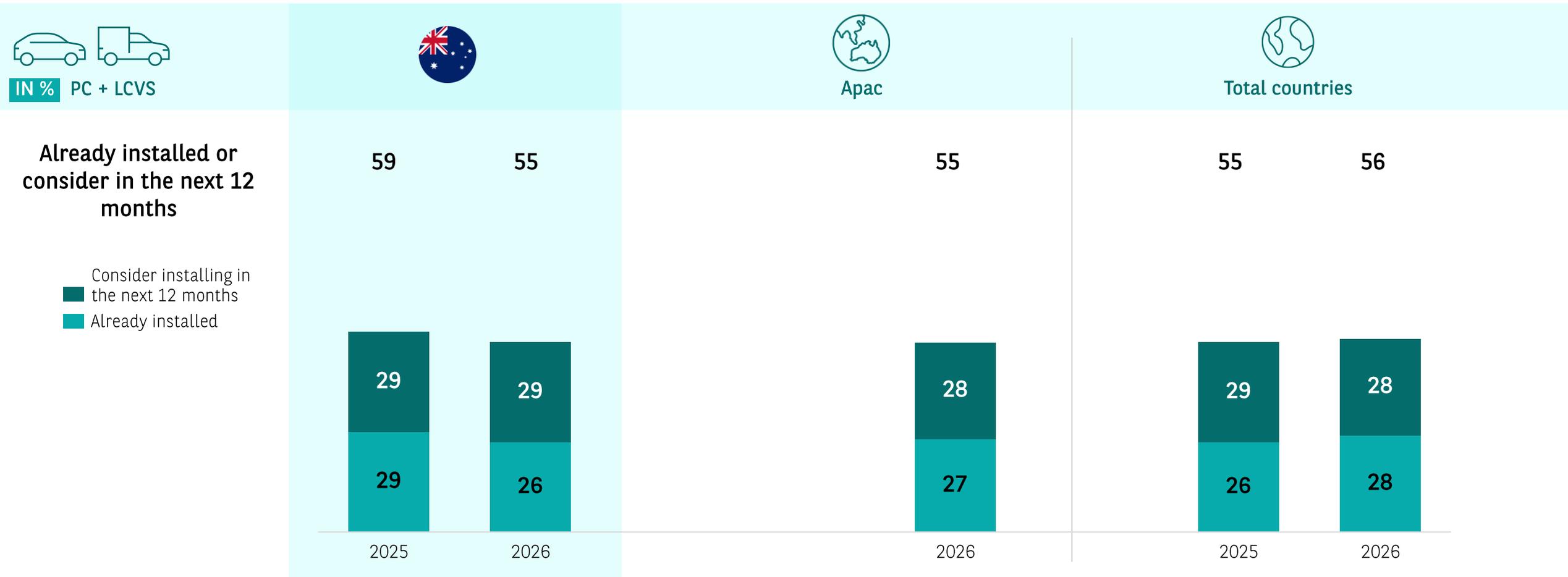
	W	AT	CH	DE	ES	FR	GR	IT	PT	UK	BE	LU	NL	CZ	PL	SK	RO	DK	FI	NO	SE	MA	TR	BR	CL	PE	US	CA	MX	AU	NZ	IN	ID	TH	
All vehicles																																			
At least one policy	99	99	98	100	99	99	93	98	99	100	100	98	99	98	99	100	96	100	99	100	99	100	99	99	99	100	100	100	99	100	100	100	98	95	
At the company's premises	85	83	82	85	83	86	79	82	85	89	87	86	85	86	89	86	81	88	88	84	84	86	83	83	84	81	88	85	84	86	86	88	85	80	
At home	21	22	20	21	18	19	23	26	23	18	18	21	25	20	19	22	23	23	18	21	18	19	21	22	17	17	23	26	18	22	18	21	21	18	
Public charging	66	67	65	73	69	63	62	64	64	69	70	65	66	60	66	67	68	63	63	68	60	64	66	65	60	69	69	62	71	67	66	69	64	65	
Passenger cars																																			
At least one policy	95	96	95	95	96	96	88	93	98	96	94	95	95	94	97	95	93	97	97	94	97	95	95	94	96	96	96	98	93	97	95	95	94	91	
At the company's premises	61	60	63	59	62	61	51	60	59	67	58	64	60	60	61	58	56	64	66	57	65	64	60	60	61	58	63	63	59	60	60	60	61	57	
At home	14	13	15	13	11	11	16	14	16	12	13	15	19	15	12	15	18	14	11	14	12	11	14	17	10	13	15	17	13	15	12	14	11	11	
Public charging	42	43	43	45	44	42	39	46	41	42	46	38	46	40	40	42	43	40	38	42	38	40	41	44	42	42	43	38	40	47	40	42	39	43	
LCV																																			
At least one policy	94	94	94	95	94	92	90	93	93	94	95	93	94	92	96	95	92	95	94	96	93	95	95	94	93	93	95	96	93	95	93	96	94	93	
At the company's premises	64	64	58	61	62	63	63	61	65	67	70	66	68	69	67	64	62	72	61	61	65	66	61	68	62	61	65	66	60	64	67	66	64	61	
At home	9	11	6	10	8	10	11	14	8	9	9	8	9	6	9	7	9	10	9	8	8	10	10	7	8	5	11	11	7	10	6	10	12	10	
Public charging	43	46	46	53	48	41	41	42	40	42	47	42	35	36	41	45	45	37	43	46	41	41	41	39	39	50	45	42	48	41	41	45	41	46	

E31. What charging policy does your company currently use, or what policy will it use in the future?
Basis: companies with corporate vehicles = 100%

INSTALLATION OF CHARGING POINTS AT COMPANY'S PREMISES

HOW TO READ THE RESULTS ?

In Australia in 2026, 55% of the companies that are using or considering charging at the company's premises have already installed charging points at the company's premises or are considering doing so in the next 12 months.



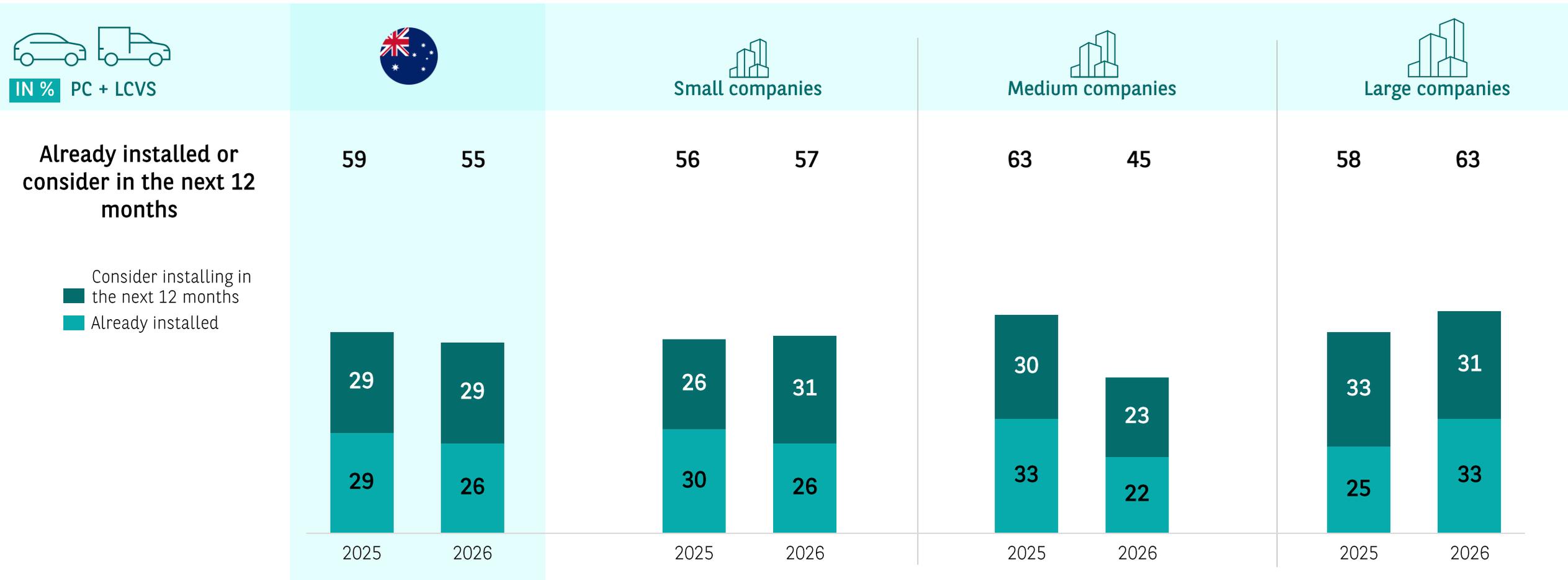
E32. Regarding charging at the company's premises, have you already installed charging points, or are you considering doing so in the next 12 months?
Basis: companies that are using or considering charging at the company's premises for passenger car or LCVs

X% Significantly higher / lower vs. previous wave

INSTALLATION OF CHARGING POINTS AT COMPANY'S PREMISES

HOW TO READ THE RESULTS ?

In Australia in 2026, 55% of the companies that are using or considering charging at the company's premises have already installed charging points at the company's premises or are considering doing so in the next 12 months.



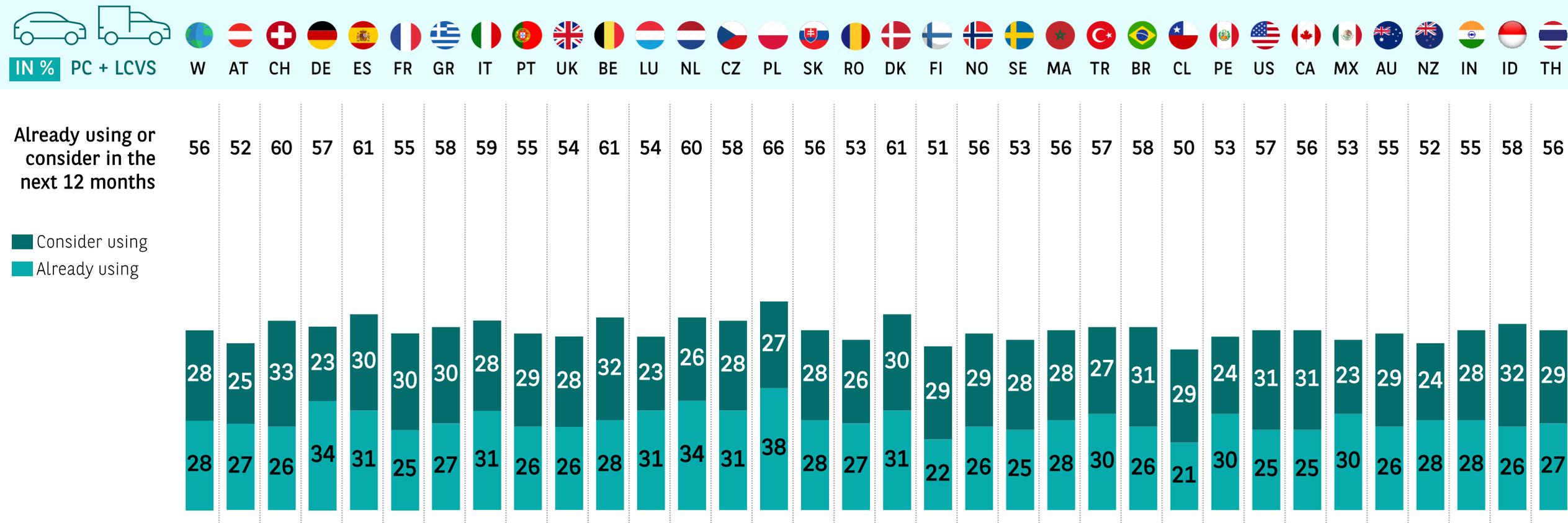
E32. Regarding charging at the company's premises, have you already installed charging points, or are you considering doing so in the next 12 months?
Basis: companies that are using or considering charging at the company's premises for passenger car or LCVs

X% Significantly higher / lower vs. previous wave

INSTALLATION OF CHARGING POINTS AT COMPANY'S PREMISES

HOW TO READ THE RESULTS ?

In Australia in 2026, 55% of the companies that are using or considering charging at the company's premises have already installed charging points at the company's premises or are considering doing so in the next 12 months.



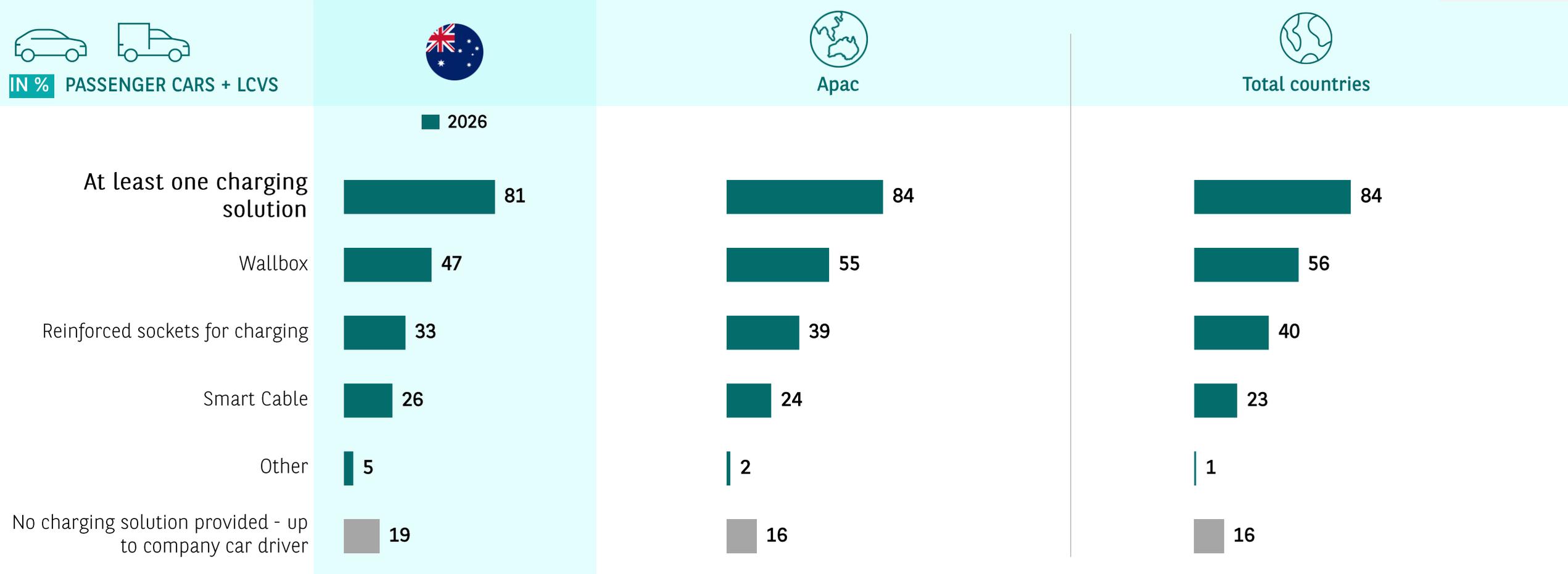
E32. Regarding charging at the company's premises, have you already installed charging points, or are you considering doing so in the next 12 months?
 Basis: companies that are using or considering charging at the company's premises for passenger car or LCVs

TYPE OF HOME CHARGING POINTS

HOW TO READ THE RESULTS ?

In Australia in 2026, 81% of the companies that are using or considering home charging offer or plan to offer at least one charging solution to company drivers.

New question



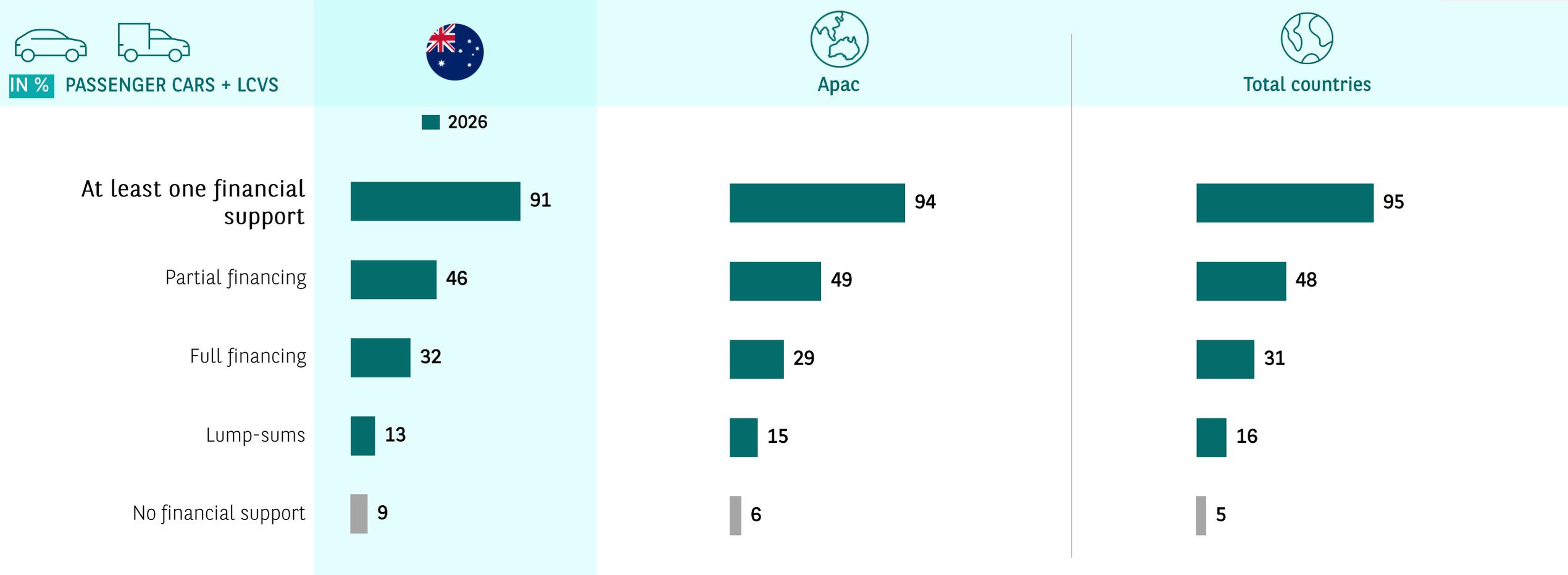
E34.NEW. Regarding home charging, what kind of home charging solutions does your company offer or plan to offer for the company car drivers?
Basis: companies that are using or considering home charging for passenger car or LCVs

TYPE OF FINANCIAL SUPPORT FOR HOME CHARGING POINTS

HOW TO READ THE RESULTS ?

In Australia in 2026, 91% of the companies that offer or plan to offer at least one charging solution to company drivers, provide at least one solution to support the provision of home charging solutions to company car drivers or plans to do so in the next 12 months.

New question



E35.NEW. How does your company financially support the provision of home charging solutions to company car drivers, or plans to do so in the next 12 months?
Basis: companies that offer or plan to offer at least one charging solution to company drivers

COST MANAGEMENT OF HOME CHARGING POINTS

HOW TO READ THE RESULTS ?

In Australia in 2026, 32% of the companies that are already financially supporting or are considering financially supporting home charging points, fully reimburse drivers for the cost of energy, or plan doing so.

New question



IN % PASSENGER CARS + LCVS

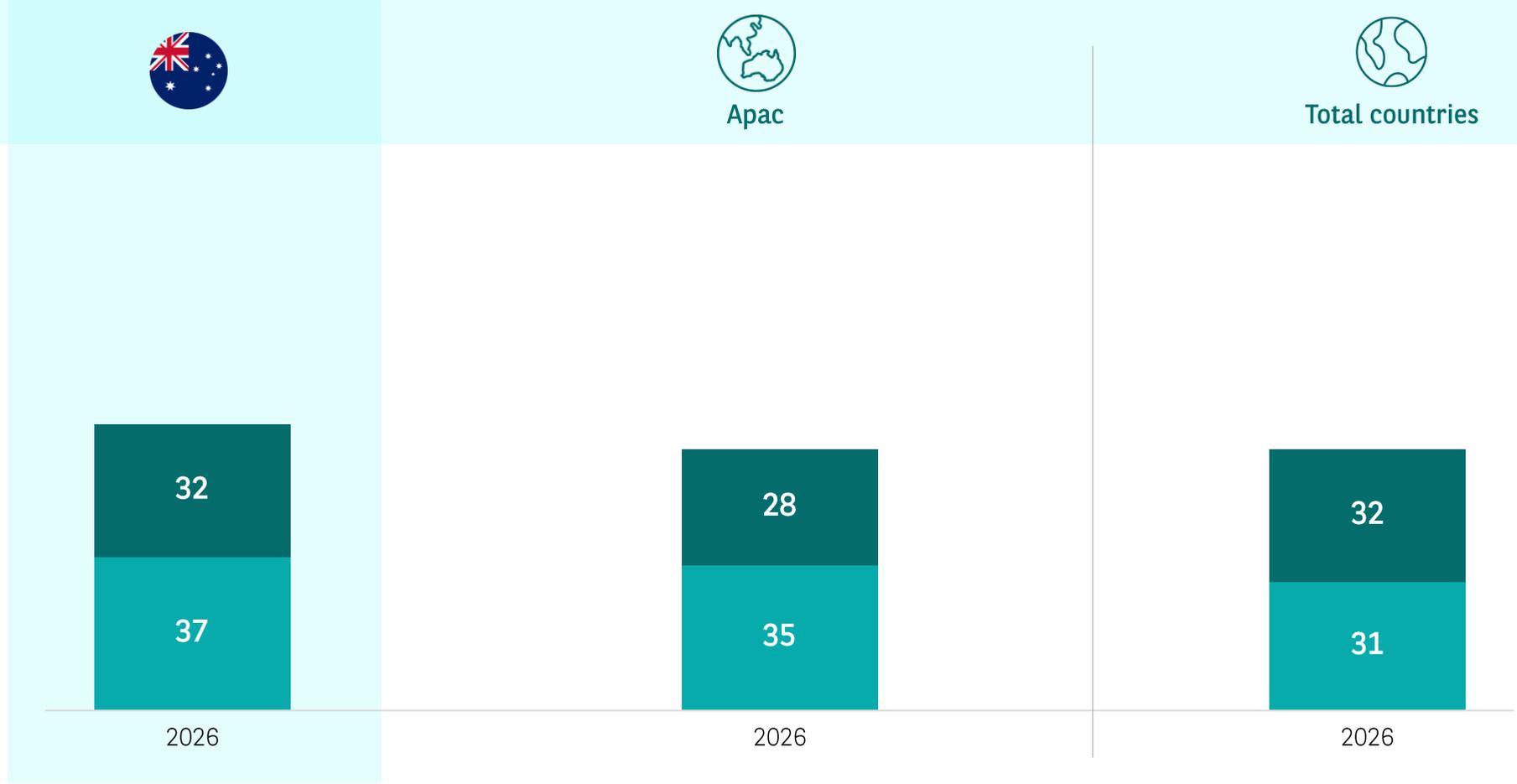


Apac



Total countries

- Drivers are fully reimbursed for the cost of energy
- Drivers are partially reimbursed for the cost of energy



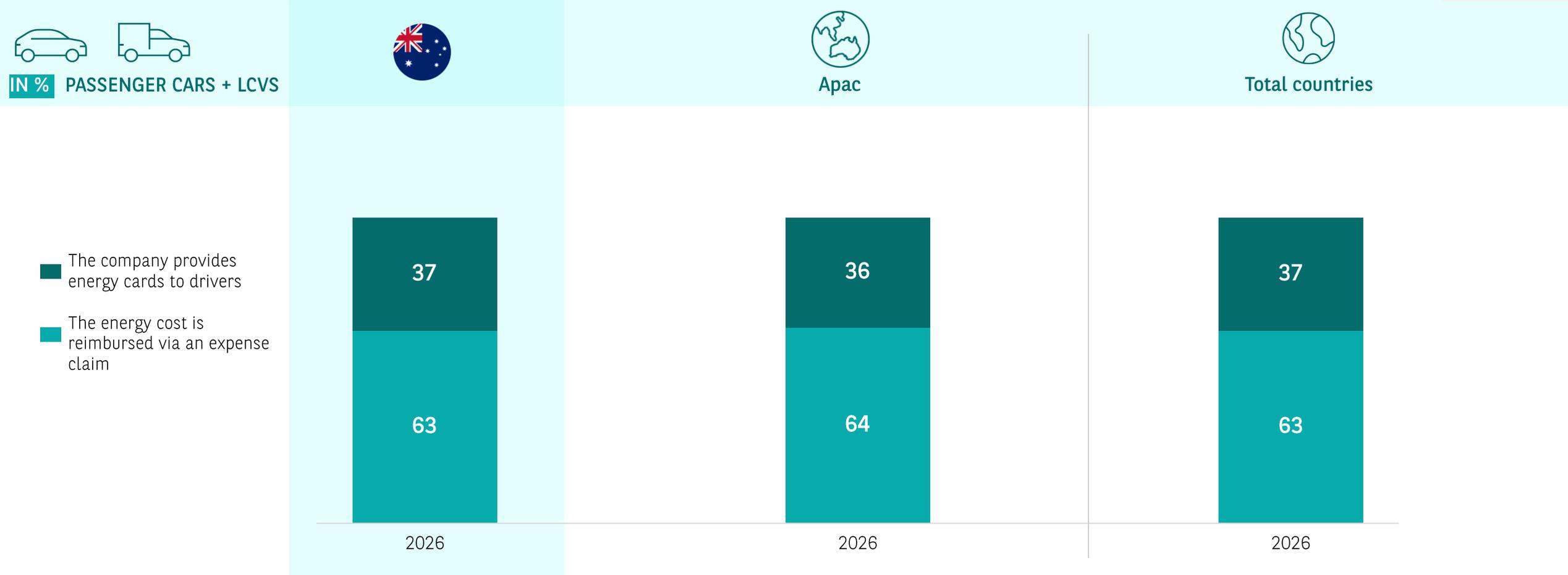
E36. How do you manage or plan to manage the energy costs of home charging for company car drivers? ?
Basis: companies that are already financially supporting or are considering financially supporting home charging points

PUBLIC CHARGING COST

HOW TO READ THE RESULTS ?

In Australia in 2026, 37% of the companies that are using or considering public charging provide energy cards to drivers.

New question



E37. Regarding public charging, how does your company manage or plan to manage the cost of recharging for professional usage of company cars?
Basis: companies using or considering public charging for passenger cars of LCVs

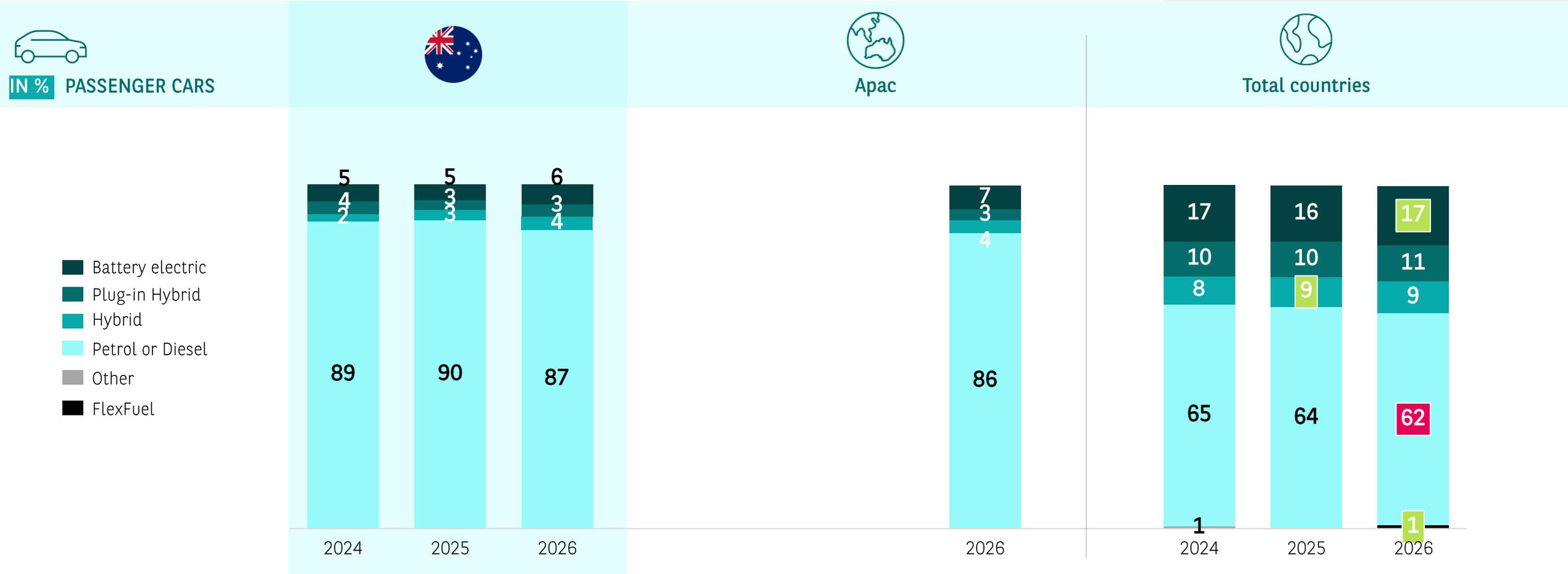
EXPECTED FLEET SHARE PER ENERGY

FOCUS ON PASSENGER CARS

HOW TO READ THE RESULTS ?

In Australia in 3 years, 6% of the passenger car fleet is expected to be BEV.

Item "FlexFuel" new and only asked in BR, CL, PE



A52. What percentage of your passenger car fleet do you expect to be: battery electric, Plug-in Hybrid, Hybrid, petrol or diesel vehicles in 3 years?
Basis: companies with passenger cars

X% Significantly higher / lower vs. previous wave

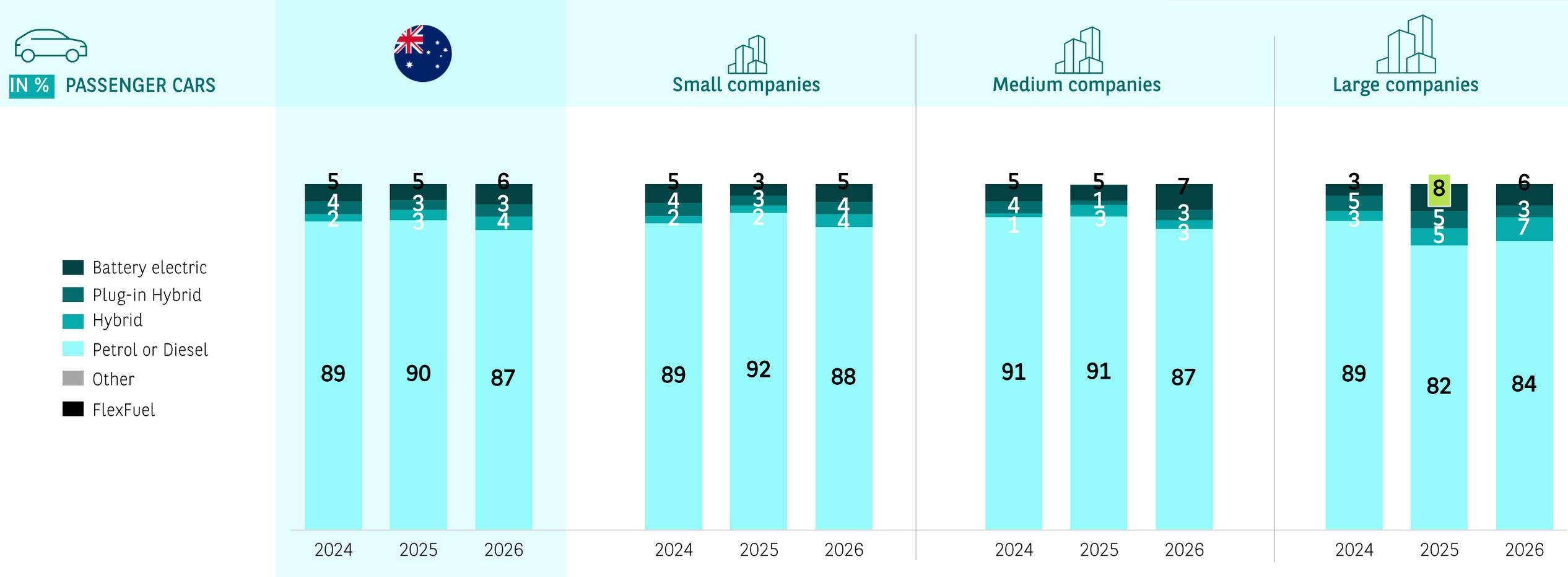
EXPECTED FLEET SHARE PER ENERGY

FOCUS ON PASSENGER CARS

HOW TO READ THE RESULTS ?

In Australia in 3 years, 6% of the passenger car fleet is expected to be BEV.

Item "FlexFuel" new and only asked in BR, CL, PE



A52. What percentage of your passenger car fleet do you expect to be: battery electric, Plug-in Hybrid, Hybrid, petrol or diesel vehicles in 3 years?
Basis: companies with passenger cars

X% Significantly higher / lower vs. previous wave

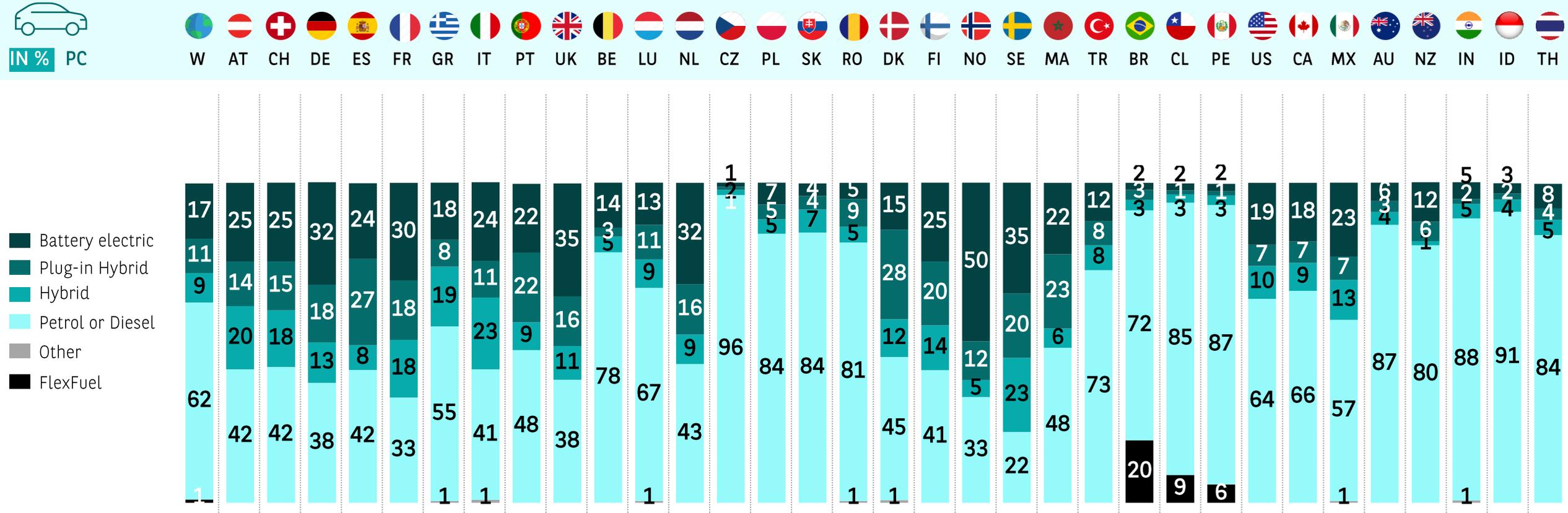
EXPECTED FLEET SHARE PER ENERGY

FOCUS ON PASSENGER CARS

HOW TO READ THE RESULTS ?

In Australia in 3 years, 6% of the passenger car fleet is expected to be BEV.

Item "FlexFuel" new and only asked in BR, CL, PE



A52. What percentage of your passenger car fleet do you expect to be: battery electric, Plug-in Hybrid, Hybrid, petrol or diesel vehicles in 3 years?
Basis: companies with passenger cars

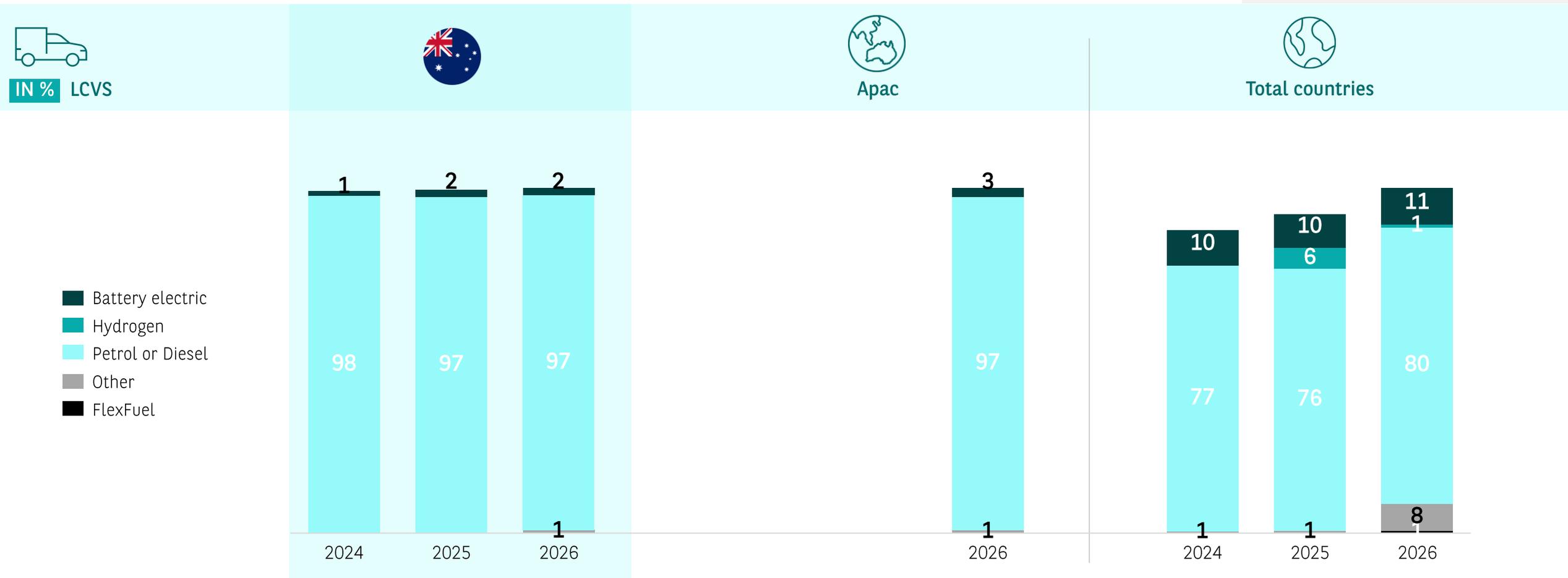
EXPECTED FLEET SHARE PER ENERGY

FOCUS ON LCVs

HOW TO READ THE RESULTS ?

In Australia in 3 years, 2% of the LCV fleet is expected to be BEV.

Item "Plug-in hybrid" deleted in 2026
 Item "Hydrogen" asked for 18 countries in 2025 / DE and NL only in 2026



A53. What percentage of your LCV fleet do you expect to be: battery electric, petrol or diesel or Hydrogen fuel cell] vehicles in 3 years?
 Basis: companies with LCVs

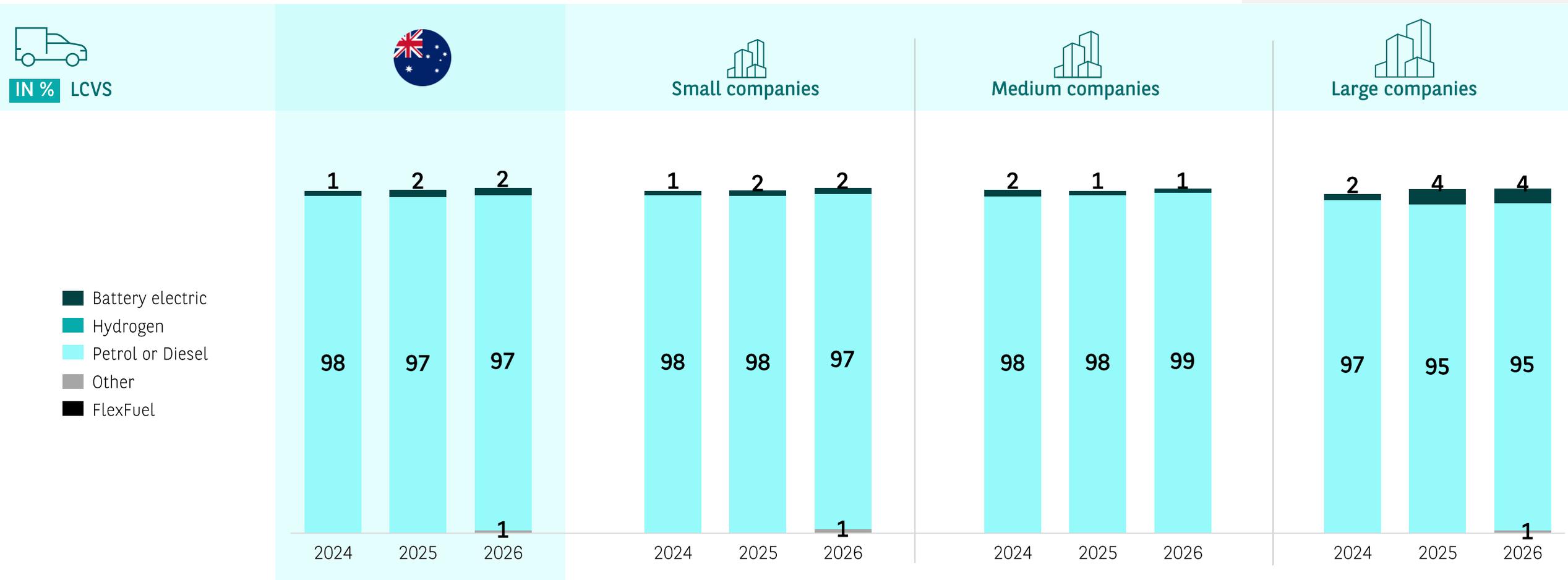
EXPECTED FLEET SHARE PER ENERGY

FOCUS ON LCVs

HOW TO READ THE RESULTS ?

In Australia in 3 years, 2% of the LCV fleet is expected to be BEV.

Item "Plug-in hybrid" deleted in 2026
 Item "Hydrogen" asked for 18 countries in 2025 / DE and NL only in 2026



A53. What percentage of your LCV fleet do you expect to be: battery electric, petrol or diesel or Hydrogen fuel cell] vehicles in 3 years?
 Basis: companies with LCVs

EXPECTED FLEET SHARE PER ENERGY

FOCUS ON LCVs

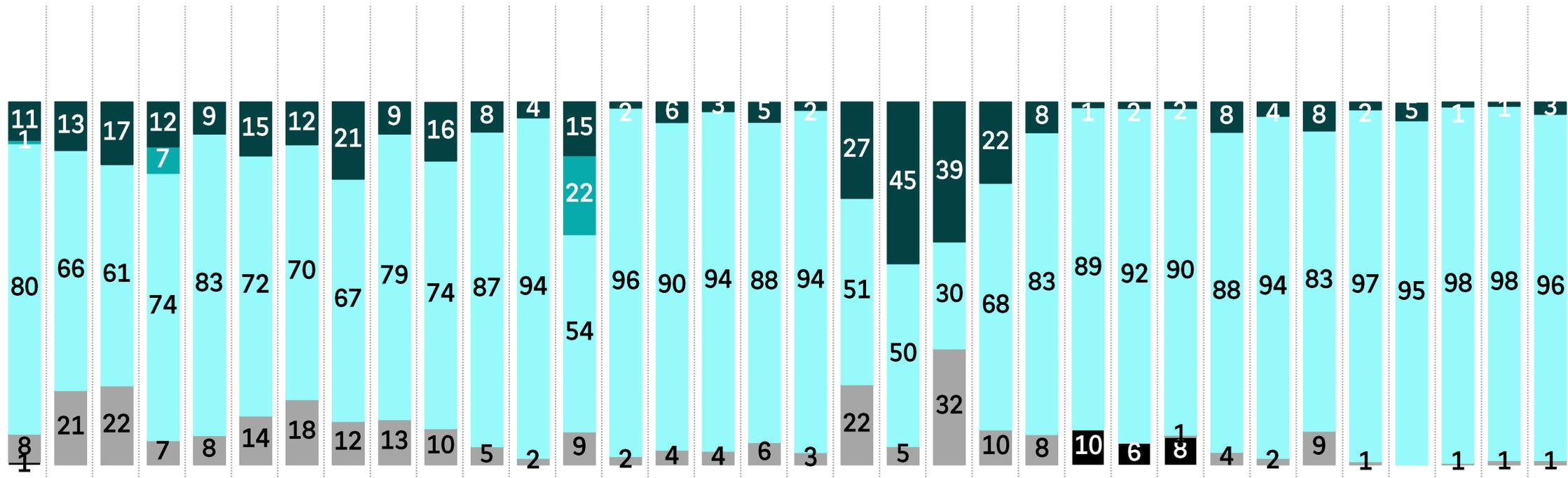
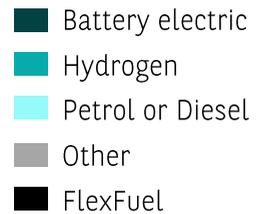
HOW TO READ THE RESULTS ?

In Australia in 3 years, 2% of the LCV fleet is expected to be BEV.

Item "Plug-in hybrid" deleted in 2026
Item "Hydrogen" asked for DE and NL only



IN % LCVs



A53. What percentage of your LCV fleet do you expect to be: battery electric, petrol or diesel or Hydrogen fuel cell] vehicles in 3 years?
Basis: companies with LCVs

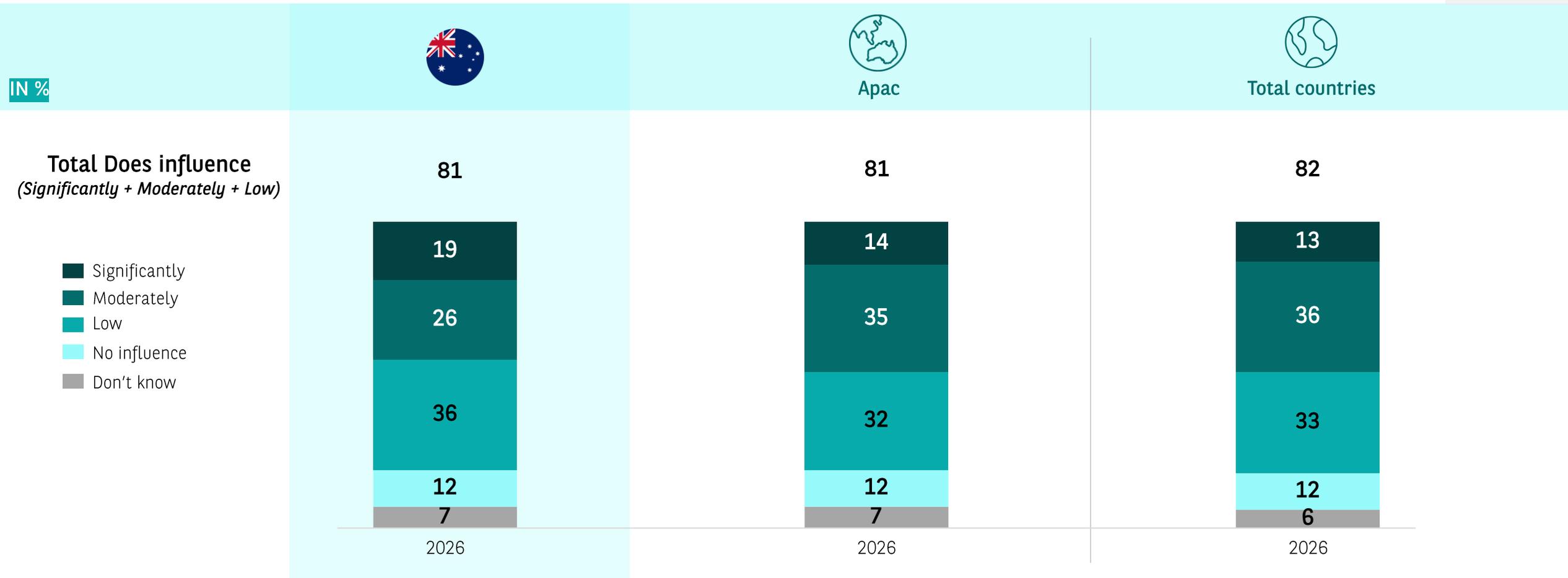


INFLUENCE OF LEASING PROVIDER ON ENERGY MIX CHOICES

HOW TO READ THE RESULTS ?

In Australia in 2026, 81% of the companies financing their vehicles with Operational leasing or Financial leasing declare that their leasing provider influence their decision to move from a thermic vehicle to an electric vehicle.

New question



E29. To what extent does the leasing provider influence your decision to move from a thermic vehicle to an electric vehicle ?
Basis: companies financing their vehicles with Operational leasing or Financial leasing



INFLUENCE OF LEASING PROVIDER ON ENERGY MIX CHOICES

HOW TO READ THE RESULTS ?

In 2026, 81% of the companies financing their vehicles with Operational leasing or Financial leasing declare that their leasing provider influence their decision to move from a thermic vehicle to an electric vehicle.

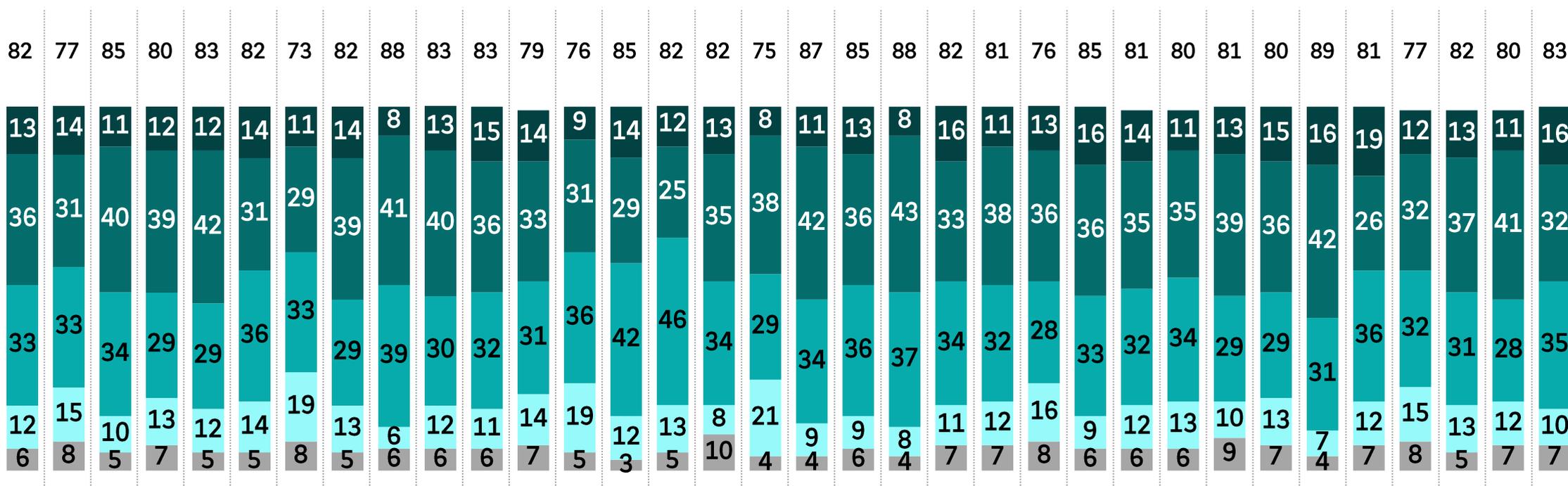
New question

IN %



Total Does influence
(Significantly + Moderately + Low)

- Significantly
- Moderately
- Low
- No influence
- Don't know



E29. To what extent does the leasing provider influence your decision to move from a thermic vehicle to an electric vehicle ?
Basis: companies financing their vehicles with Operational leasing or Financial leasing

MAIN REASONS TO START ORDERING MORE BEV

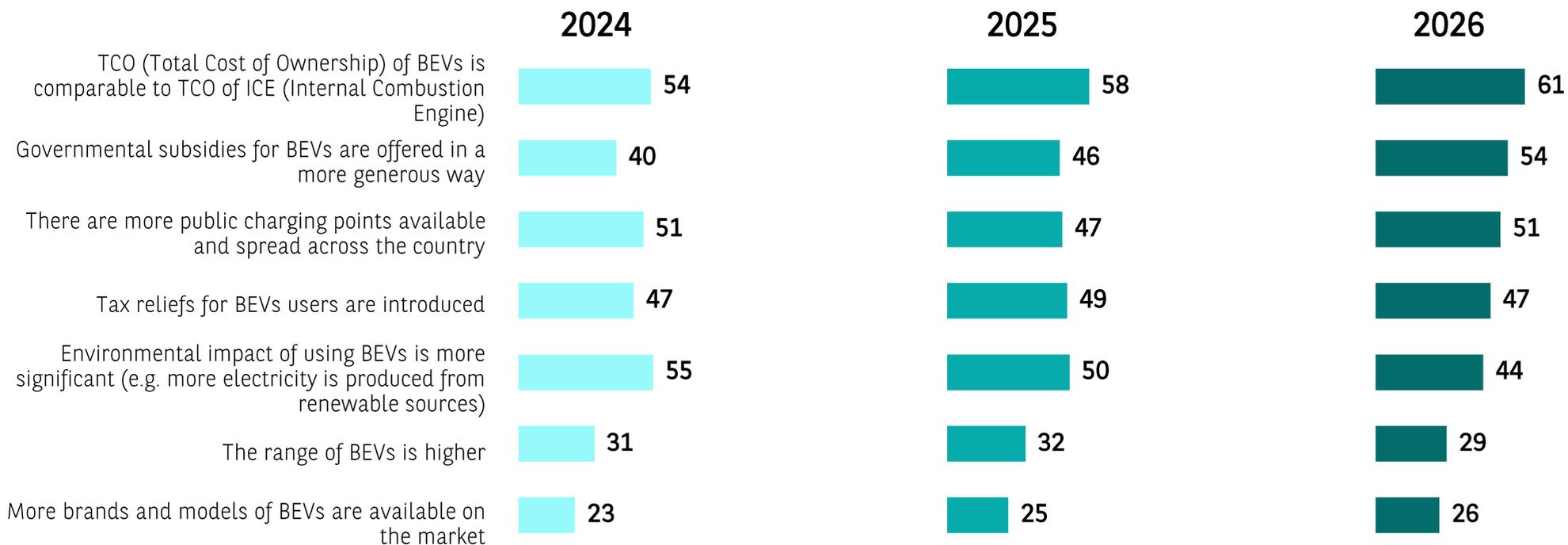
HOW TO READ THE RESULTS ?

In 2026, 61% of the companies that are already using or considering BEV for passenger cars or LCV declare that the main reason to start ordering more BEV is: TCO (Total Cost of Ownership) of BEVs is comparable to TCO of ICE (Internal Combustion Engine).

Local question



IN % PASSENGER CARS + LCVS



A6. What would be the main reasons for your company to start ordering more BEVs (battery electric vehicles)?
Basis: companies already using or considering BEV for passenger cars or LCV

X% Significantly higher / lower vs. previous wave

HOW TO READ THE RESULTS ?

In 2026, 30% of the companies that are already using or considering BEV/PHEV for passenger cars or LCV have expanded the car policy for electric vehicles in terms of brand selection.



Local question

IN % PASSENGER CARS + LCVS

Have expanded the car policy for electric vehicles in terms of brand selection



AT4. Have you expanded your car policy for electric vehicles in terms of brand selection?
Basis: companies already using or considering BEV/PHEV for passenger cars or BEV for LCV

X% Significantly higher/lower vs. previous wave

04

CONNECTED FLEETS

What are the applications in terms of connected vehicles, data management solutions, and road safety equipment?



Telematics adoption in Australia is on a decreasing trend

Currently, 32% of companies have connected vehicles for all or part of their fleet, which is lower than the 41% reported in 2024. This level of adoption is consistent across company sizes and vehicle types.

A cautious data usage with a good potential in the future

10% of the companies in Australia are using the data from telematics platforms and a significant 46% of companies are considering leveraging these data. These figures are slightly below the ones of the APAC average.

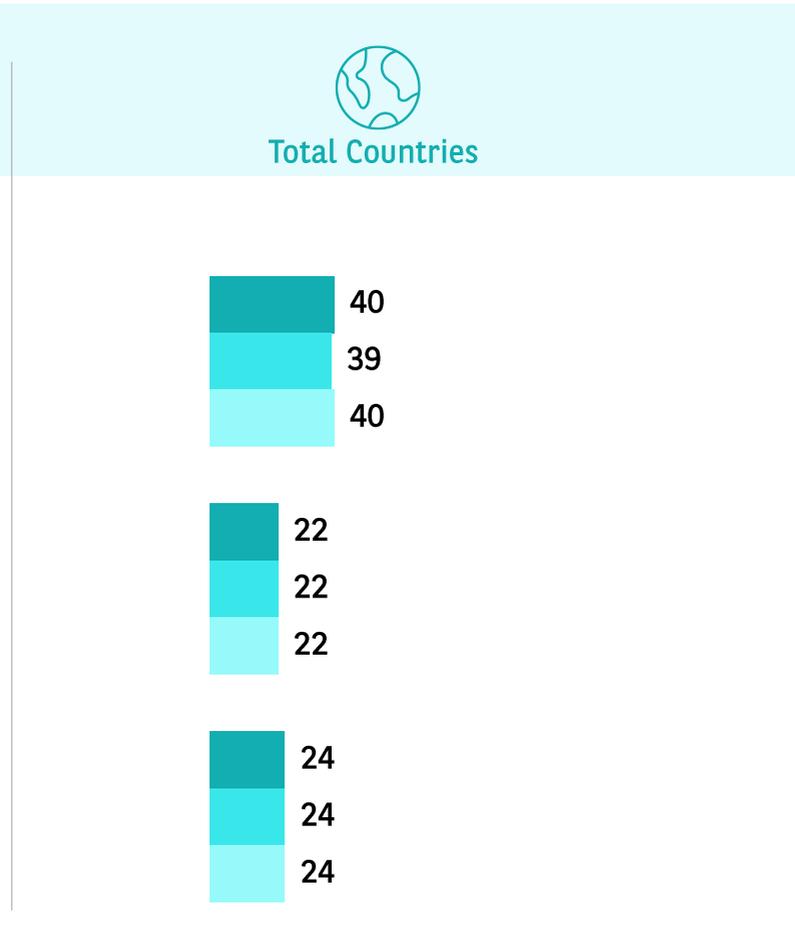
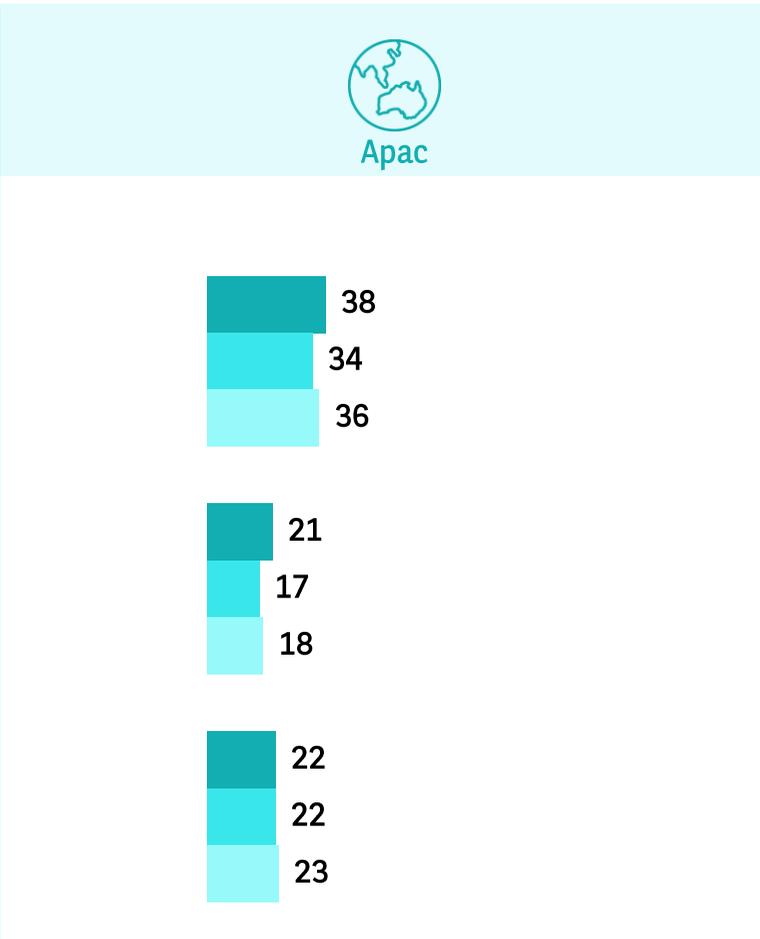
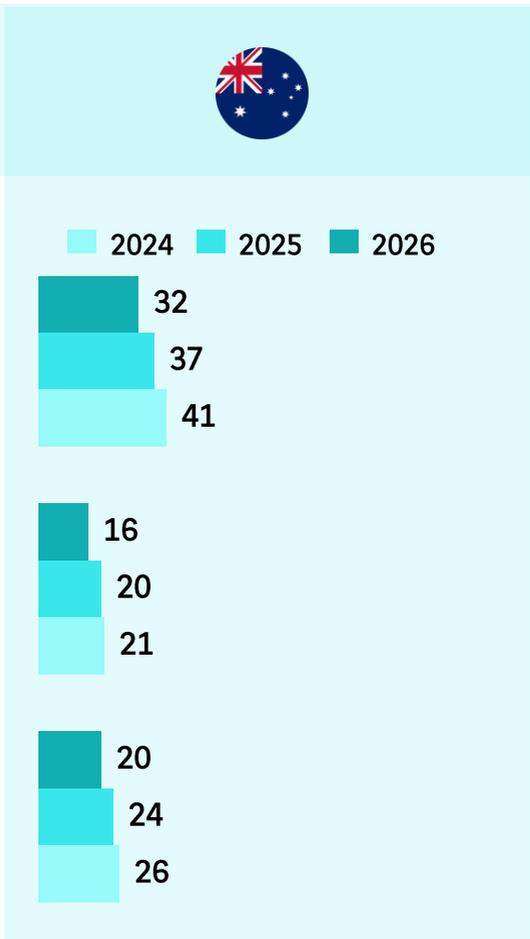
PROPORTION OF COMPANIES USING CONNECTED VEHICLES

HOW TO READ THE RESULTS ?

In Australia in 2026, 32% of the companies have connected vehicles for all or part of their fleet.

16% have connected passenger cars and 20% have connected LCVs.

IN % Total OF YES:
FOR ALL + FOR PART OF THE FLEET



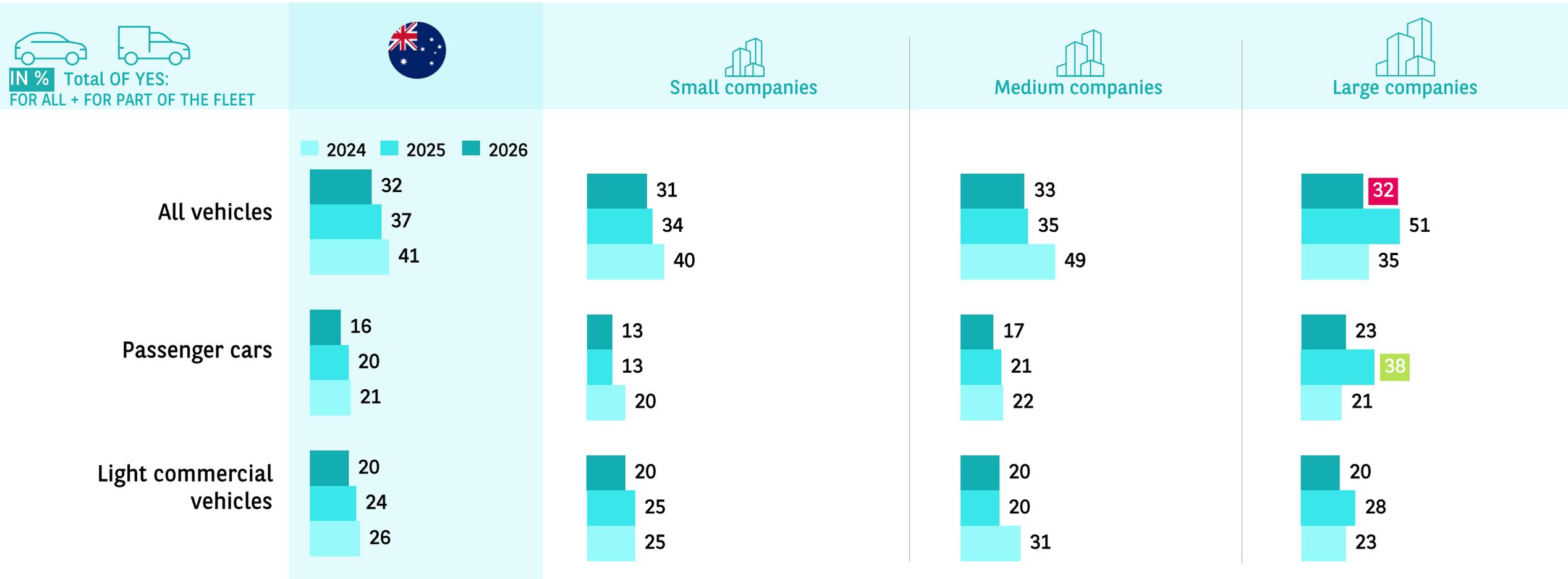
E23c. Is your fleet connected thanks to a telematic tool?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

HOW TO READ THE RESULTS ?

In Australia in 2026, 32% of the companies have connected vehicles for all or part of their fleet. 16% have connected passenger cars and 20% have connected LCVs.



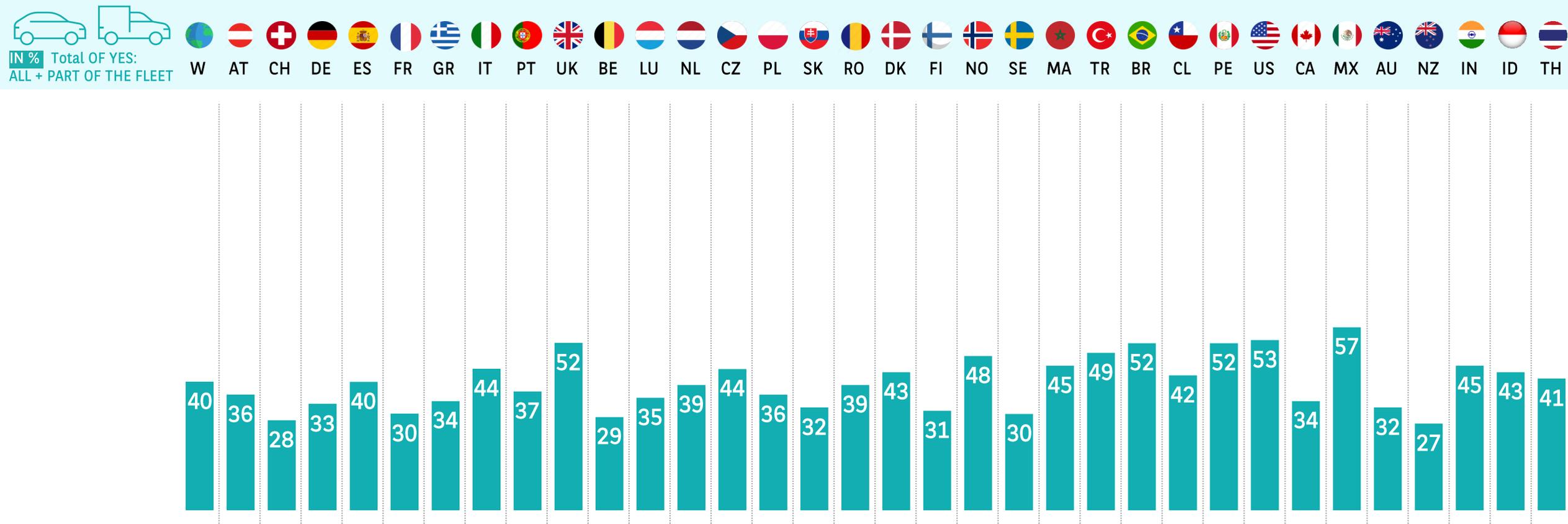
E23c. Is your fleet connected thanks to a telematic tool?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

HOW TO READ THE RESULTS ?

In Australia in 2026, 32% of the companies have connected vehicles for all or part of their fleet.

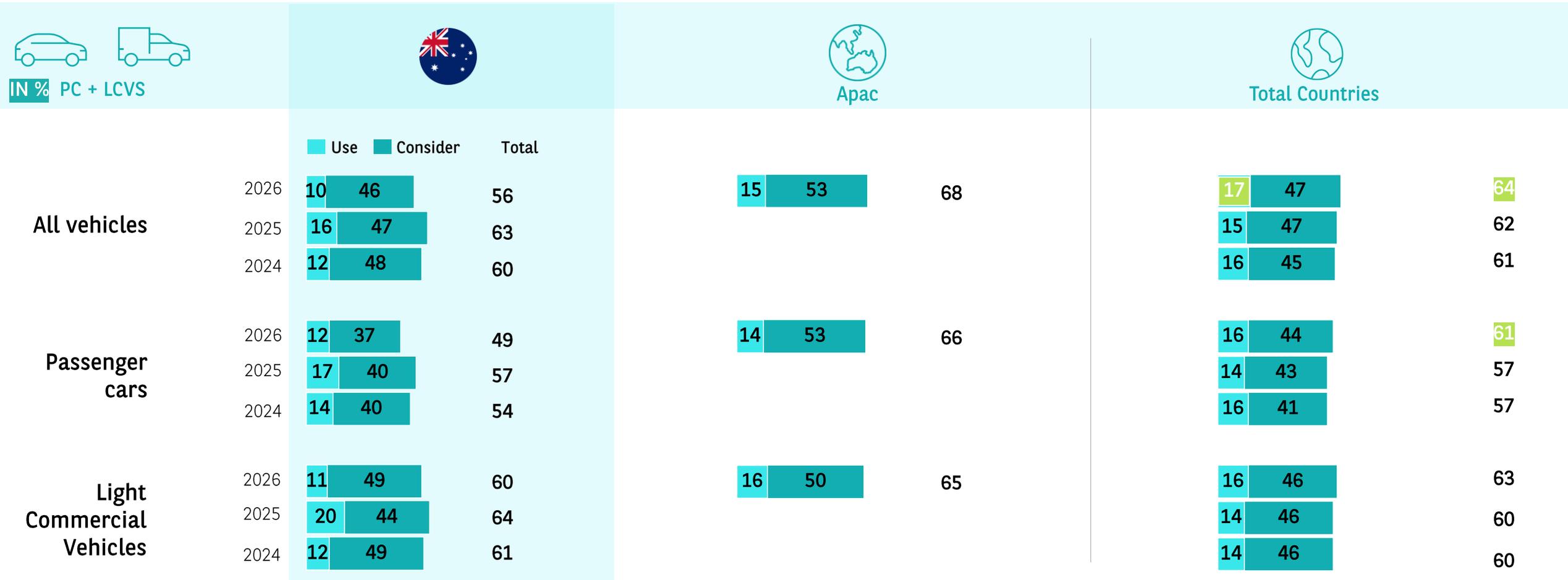


E23c. Is your fleet connected thanks to a telematic tool?
Basis: companies with corporate vehicles = 100%

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

HOW TO READ THE RESULTS ?

In Australia in 2026, 56% of the companies with connected vehicles are already using the data coming from the vehicle box thanks to a telematics platform or are considering doing so in the next 3 years.



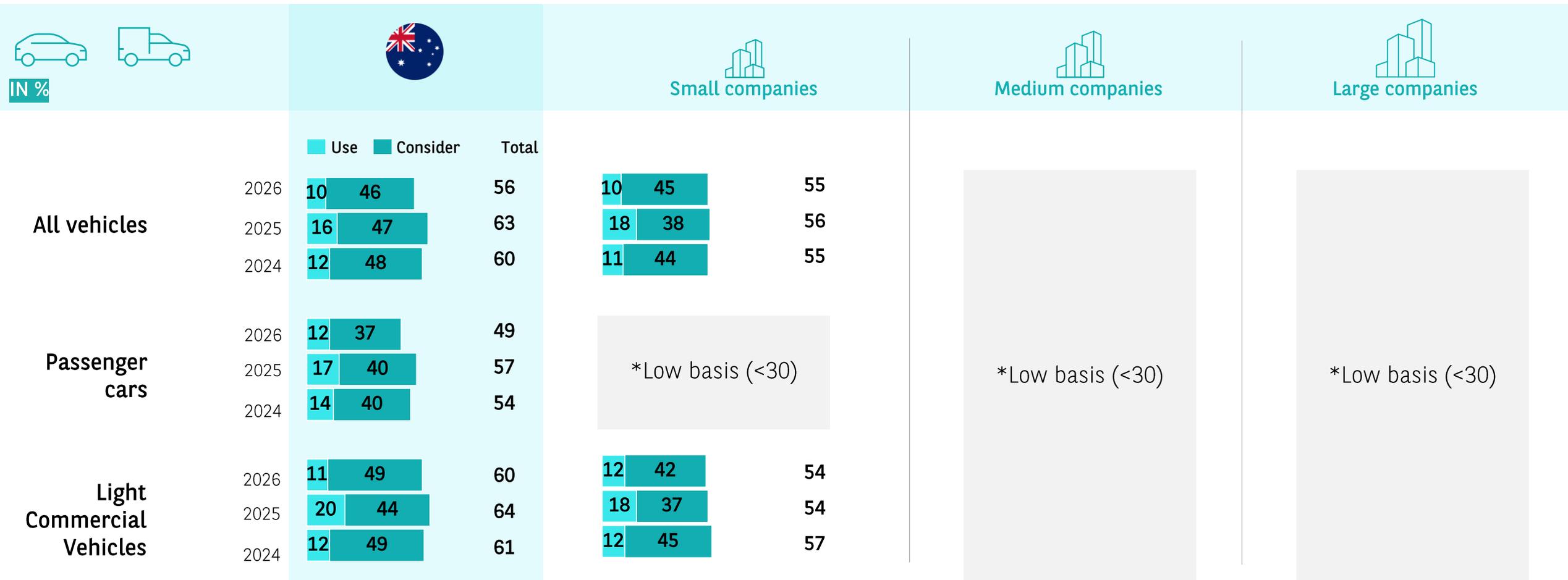
E23d. Do you use or consider using the data coming from the vehicle box thanks to a telematics platform ?
Basis: companies with connected vehicles thanks to a telematic tool

X% Significantly higher / lower vs. previous wave

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

HOW TO READ THE RESULTS ?

In Australia in 2026, 56% of the companies with connected vehicles are already using the data coming from the vehicle box thanks to a telematics platform or are considering doing so in the next 3 years.



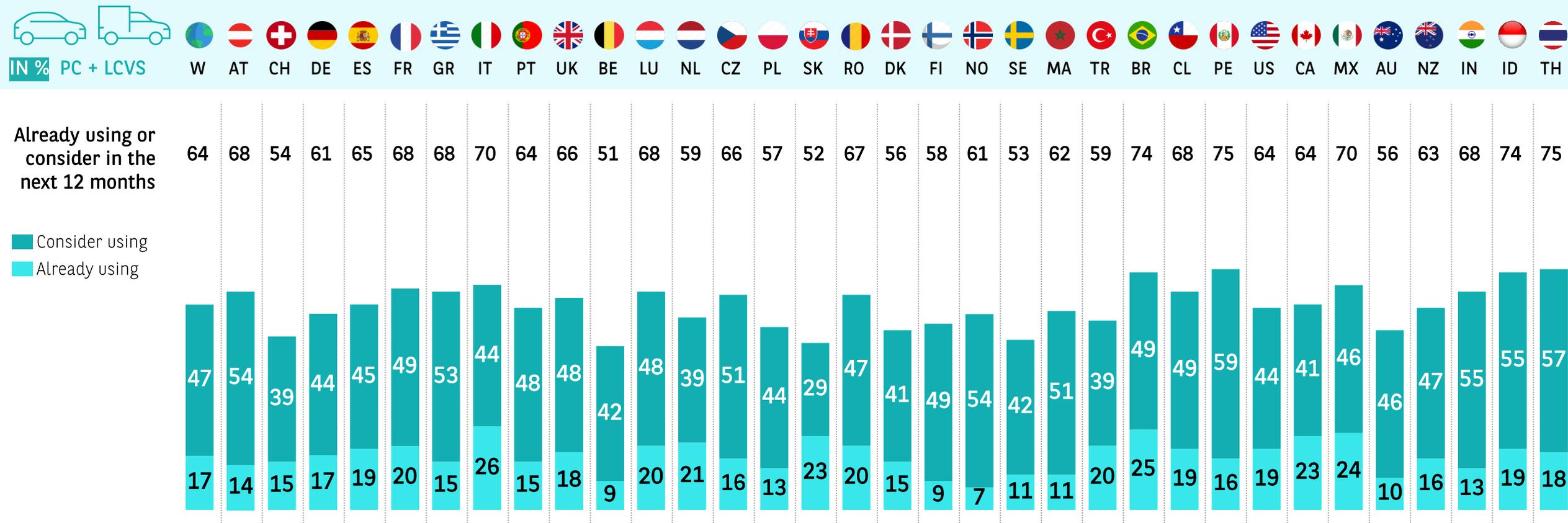
E23d. Do you use or consider using the data coming from the vehicle box thanks to a telematics platform ?
Basis: companies with connected vehicles thanks to a telematic tool

X% Significantly higher / lower vs. previous wave

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

HOW TO READ THE RESULTS ?

In Australia in 2026, 56% of the companies with connected vehicles are already using the data coming from the vehicle box thanks to a telematics platform or are considering doing so in the next 3 years.



E23d. Do you use or consider using the data coming from the vehicle box thanks to a telematics platform ?
 Basis: companies with connected vehicles thanks to a telematic tool

05

EMPLOYEE MOBILITY

What are the perspectives in terms of mobility policies and solutions?



Australia continue to show strong commitment to corporate mobility policies and solutions

94% of companies in Australia have implemented or plan to implement at least one mobility policy or solution, aligning with the APAC average and being consistent across various company sizes.

Personal vehicle expense reimbursement, ride-sharing and company-provided cards for paying mobility solutions are the main mobility policies and solutions

Personal vehicle expense reimbursement leads mobility policies with 43% of companies using or considering it.

Ride-sharing, now at 39% after a 7-point increase, is the most utilized or considered mobility solution, followed by company-provided cards for multiple mobility solutions, with 32% usage or consideration.

These reflect trends observed in the APAC average.

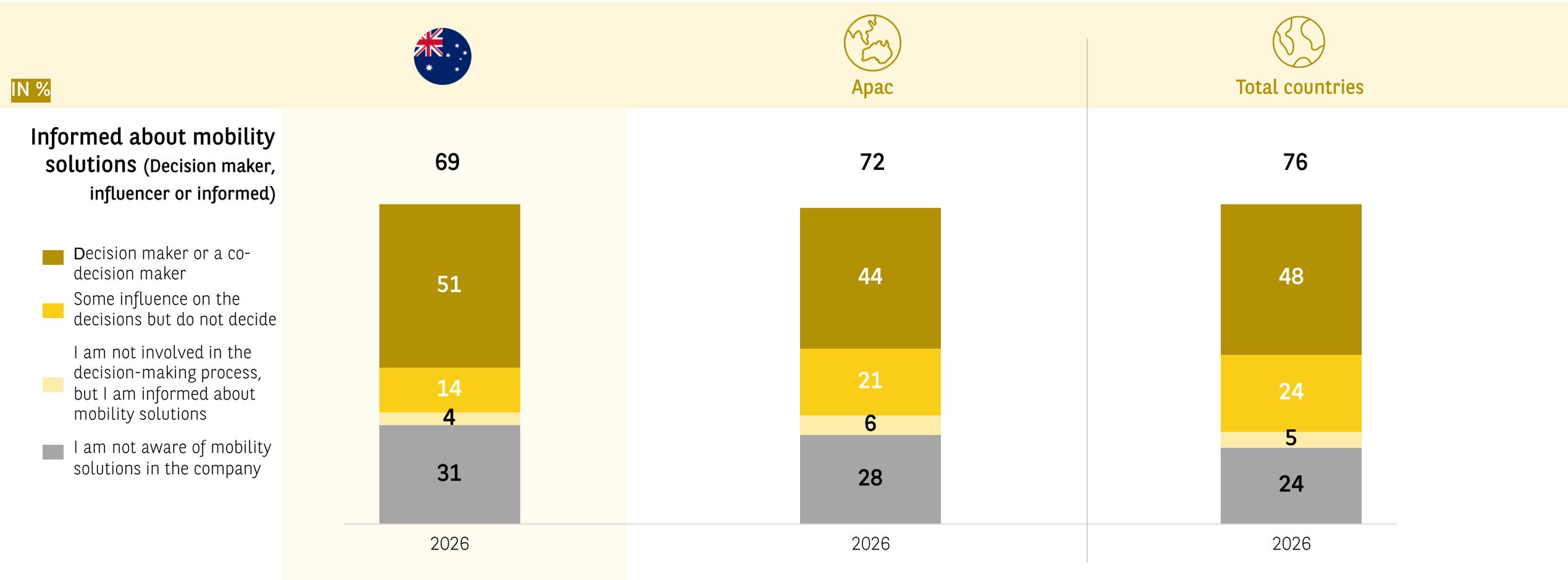
Tax benefits, HR needs and CSR policies drive corporate mobility solutions

40% of Australian companies are developing corporate mobility programs due to tax benefits, while 39% cite HR needs and another 39% point to CSR policies as motivating factors.

RESPONDENTS' INVOLVEMENT IN MOBILITY SOLUTION DECISIONS

HOW TO READ THE RESULTS ?

In Australia in 2026, 69% of the respondents are informed about mobility solutions.



A12. To what extent are you informed about mobility solutions using other modes of transportation than company cars (such as car sharing, bike sharing etc...)?

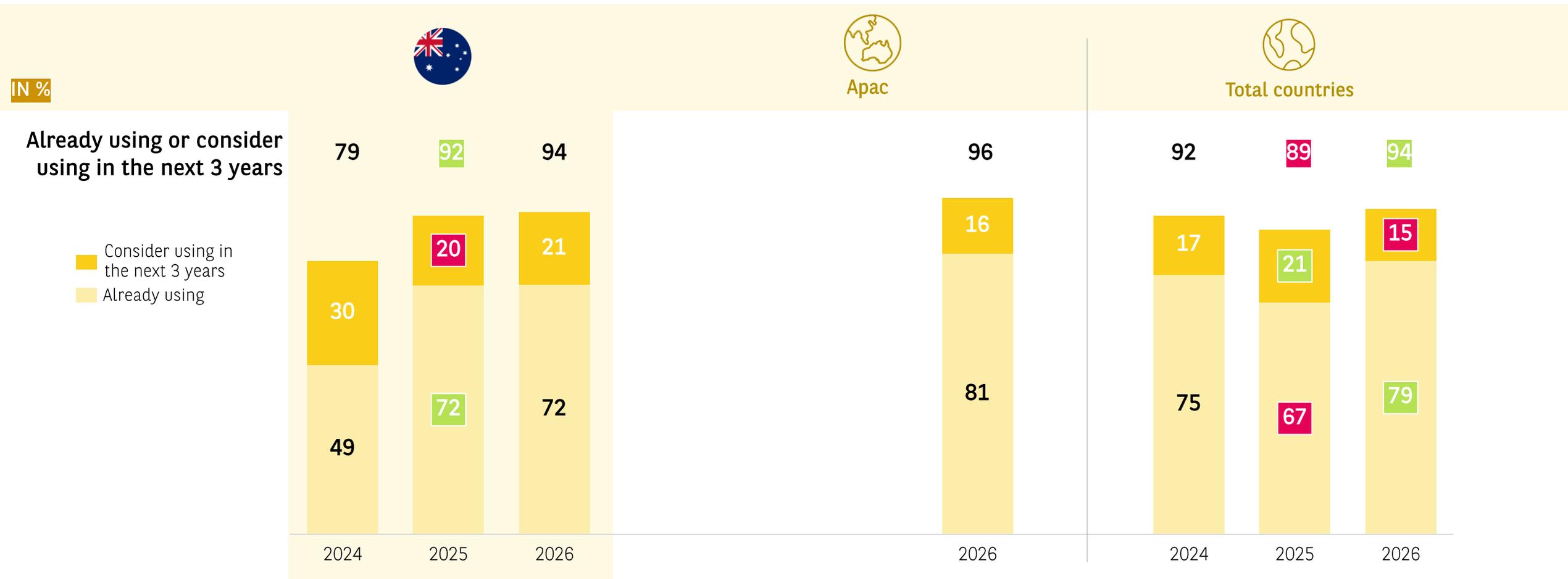
Basis: companies with corporate vehicles = 100%

MOBILITY POLICIES AND SOLUTIONS IMPLEMENTATION

AT LEAST ONE MOBILITY POLICY AND SOLUTION

HOW TO READ THE RESULTS ?

Overall in Australia in 2026, 94% of the companies are already using at least one mobility policy or solution or are considering doing so in the next 3 years.



MM13/MM15. Which of the following mobility policies / solutions have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

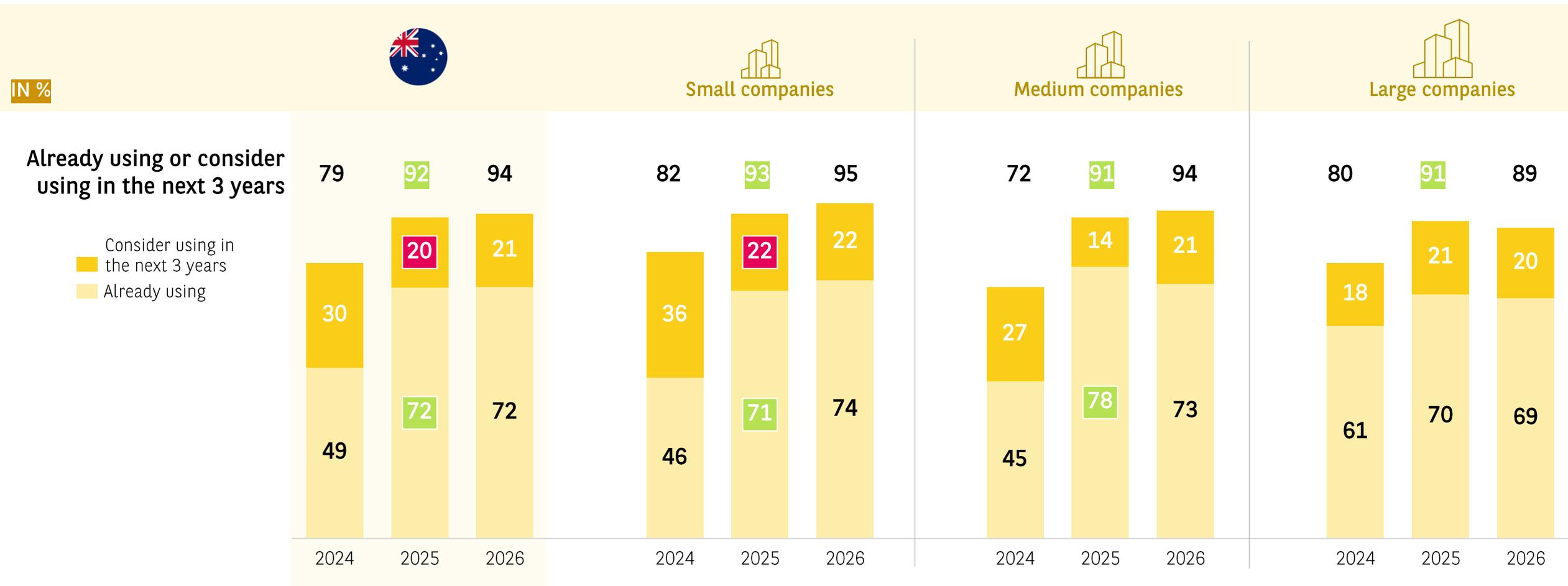
X% Significantly higher / lower vs. previous wave

MOBILITY POLICIES AND SOLUTIONS IMPLEMENTATION

AT LEAST ONE MOBILITY POLICY AND SOLUTION

HOW TO READ THE RESULTS ?

In Australia in 2026, 94% of the companies are already using at least one mobility policy or solution or are considering doing so in the next 3 years.



MM13/MM15. Which of the following mobility policies / solutions have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

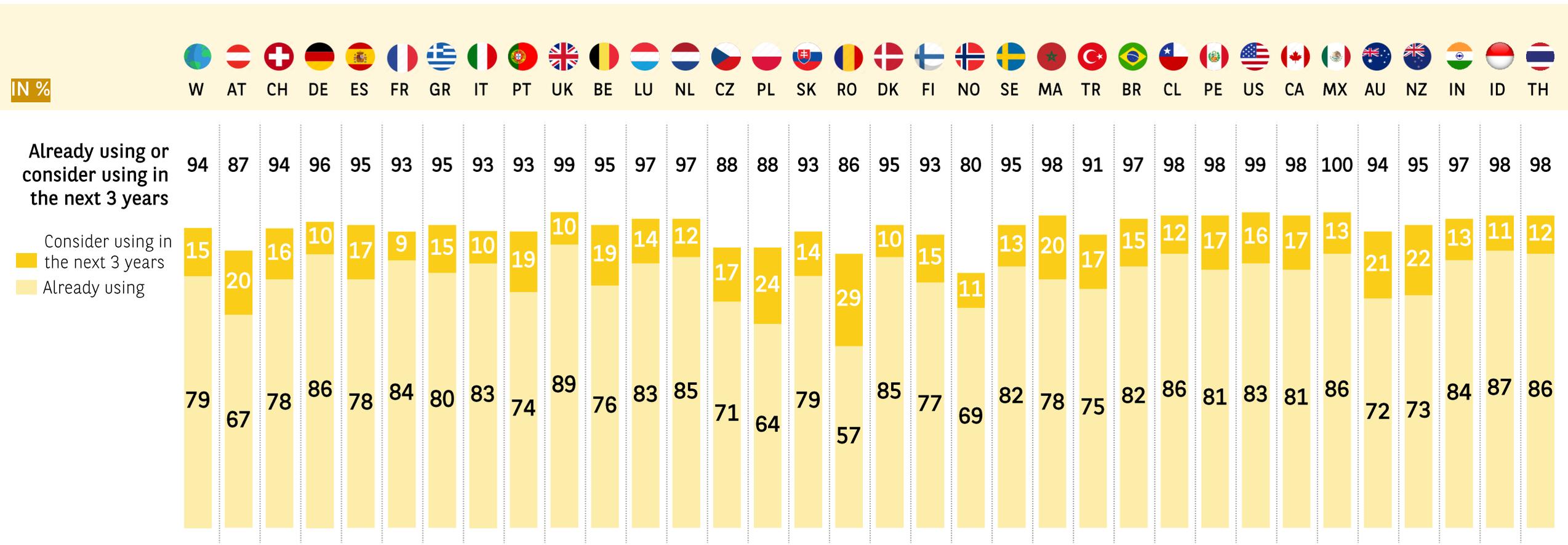
X% Significantly higher / lower vs. previous wave

MOBILITY POLICIES AND SOLUTIONS IMPLEMENTATION

AT LEAST ONE MOBILITY POLICY AND SOLUTION

HOW TO READ THE RESULTS ?

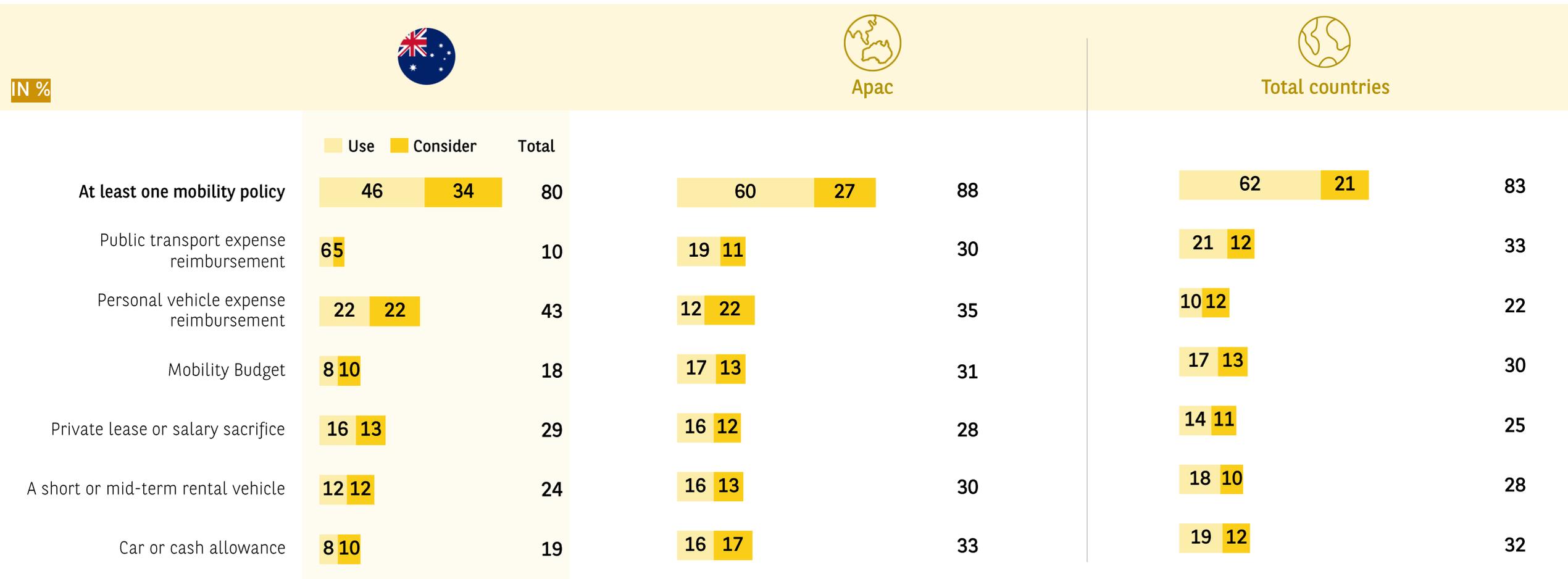
In Australia in 2026, 94% of the companies are already using at least one mobility policy or solution or are considering doing so in the next 3 years.



MM13/MM15. Which of the following mobility policies / solutions have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

HOW TO READ THE RESULTS ?

In Australia in 2026, 10% of the companies are already using Public transport expense reimbursement or are considering doing so in the next 3 years.



MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?

Basis: companies with corporate vehicles = 100%



HOW TO READ THE RESULTS ?

In Australia in 2026, 10% of the companies are already using Public transport expense reimbursement or are considering doing so in the next 3 years.



Apac

Total countries

	IN %	2024	2025	2026		2026	2024	2025	2026
Public transport expense reimbursement	Use	6	7	6	Apac	19	21	19	21
	Total (use + consider)	12	12	10		30	31	32	33
Personal vehicle expense reimbursement	Use		23	22		12		8	10
	Total (use + consider)		42	43		35		19	22
Mobility Budget	Use	8	4	8		17	15	15	17
	Total (use + consider)	18	19	18		31	28	29	30
Private lease or salary sacrifice	Use	20	22	16		16	13	6	14
	Total (use + consider)	37	33	29		28	24	15	25
A short or mid term rental vehicle	Use	8	14	12		16	17	17	18
	Total (use + consider)	18	28	24		30	27	29	28
Car or cash allowance	Use	14	15	8	16	17	17	19	
	Total (use + consider)	19	23	19	33	28	30	32	

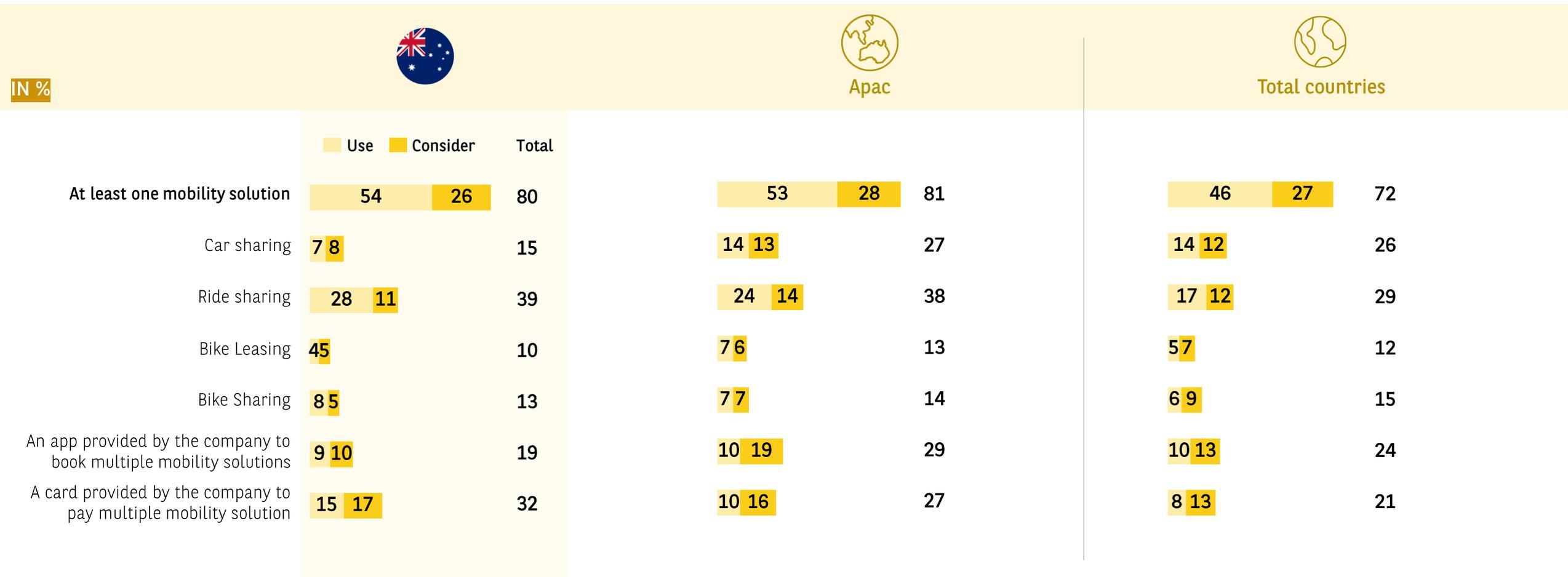
MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave



HOW TO READ THE RESULTS ?

In Australia in 2026, 15% of the companies are already using Car sharing or are considering doing so in the next 3 years.



MM15. Which of the following mobility solutions have you implemented or are you considering implementing in the next 3 years?

Basis: companies with corporate vehicles = 100%

HOW TO READ THE RESULTS ?

In Australia in 2026, 15% of the companies are already using Car sharing or are considering doing so in the next 3 years.



Apac



Total countries

		IN %	2024	2025	2026			2026	2024	2025	2026	
Car sharing	Use		7	13	7	Apac		14	12	12	14	
	Total (use + consider)		14	20	15			27	23	23	26	
Ride sharing or car pooling	Use			16	28			24	19	8	17	
	Total (use + consider)			26	39			38	29	19	29	
Bike Leasing	Use			6	4			7			4	5
	Total (use + consider)			15	10			13			12	12
Bike Sharing	Use			7	8			7			5	6
	Total (use + consider)			18	13			14			15	15
An app provided by the company to book multiple mobility solutions	Use		6	12	9			10	10	11	10	
	Total (use + consider)		17	22	19			29	21	23	24	
A card provided by the company to pay multiple mobility solution	Use			18	15		10			8	8	
	Total (use + consider)			36	32		27			22	21	

Change of definition

MM15. Which of the following mobility solutions have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

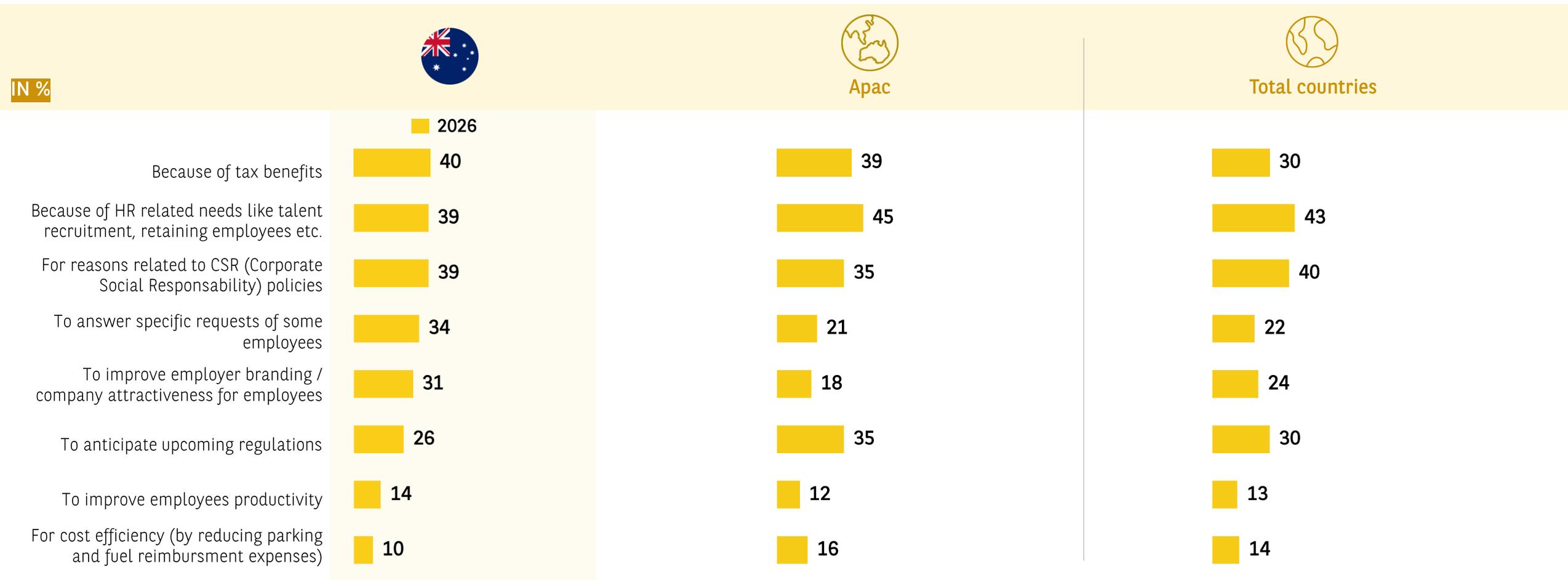
X% Significantly higher / lower vs. previous wave



REASONS FOR IMPLEMENTING MOBILITY SOLUTIONS & POLICIES

HOW TO READ THE RESULTS ?

In Australia in 2026, 40% of the companies declare that the main reason for introducing mobility solutions & policies is: Because of tax benefits.



MM16. For what reasons has your company introduced, or does your company intend to introduce, these mobility solutions and policies?
Basis: companies using or considering at least one mobility solution or policy

PUBLIC TRANSPORT EXPENSE REIMBURSEMENT

HOW TO READ THE RESULTS ?

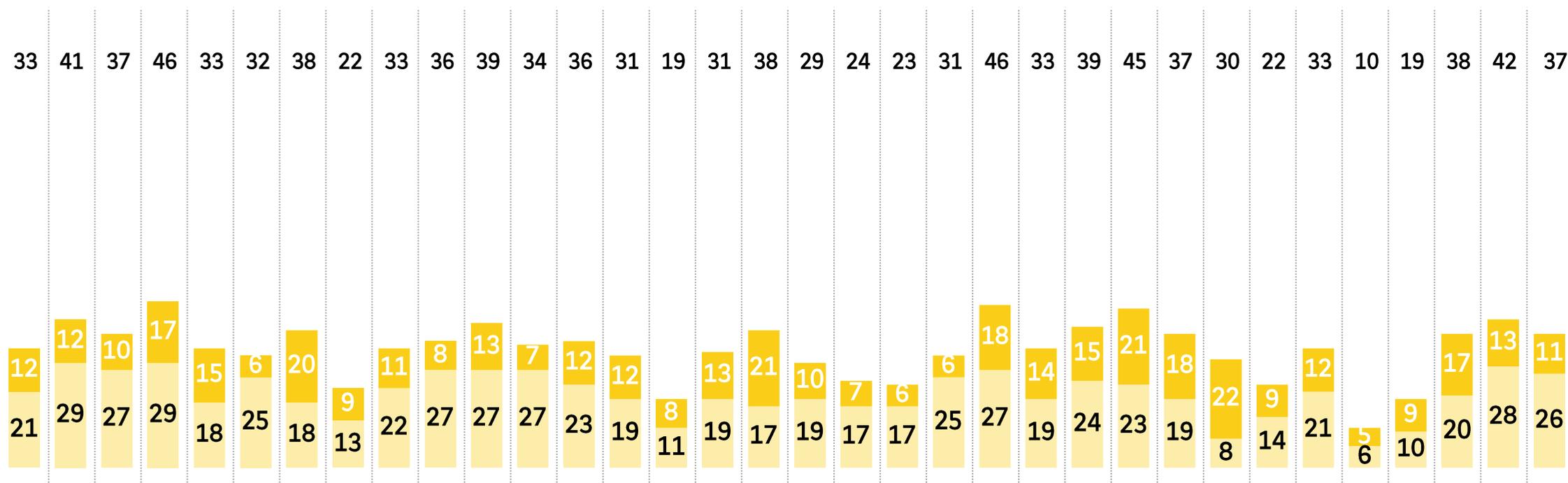
In Australia in 2026, 10% of the companies are already using Public transport expense reimbursement or are considering doing so in the next 3 years.

IN %



Already using or consider in the next 12 months

Consider using in the next 3 years
Already using



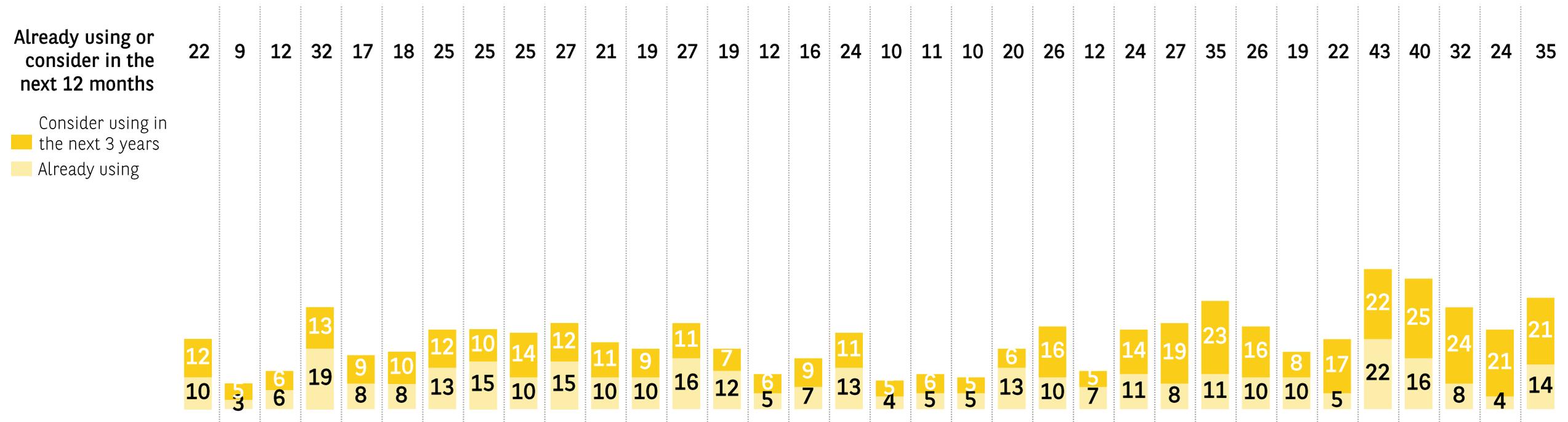
MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

PERSONAL VEHICLE EXPENSE REIMBURSEMENT

HOW TO READ THE RESULTS ?

In Australia in 2026, 43% of the companies are already using Personal vehicle expense reimbursement or are considering doing so in the next 3 years.

IN %

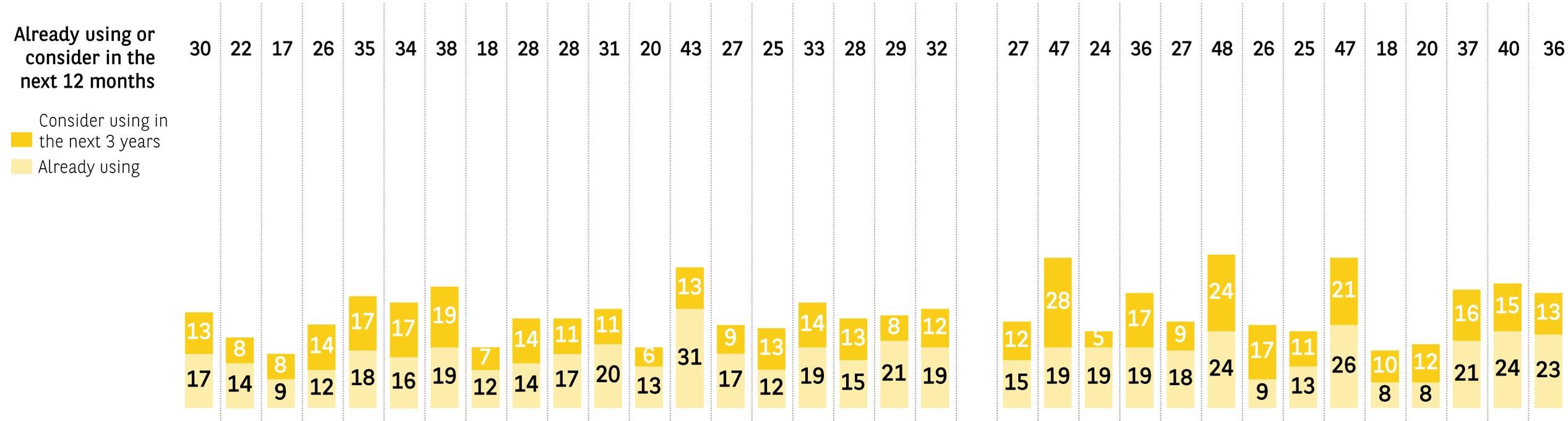


MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

HOW TO READ THE RESULTS ?

In Australia in 2026, 18% of the companies are already using Mobility Budget or are considering doing so in the next 3 years.

IN %



MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

PRIVATE LEASE OR SALARY SACRIFICE

HOW TO READ THE RESULTS ?

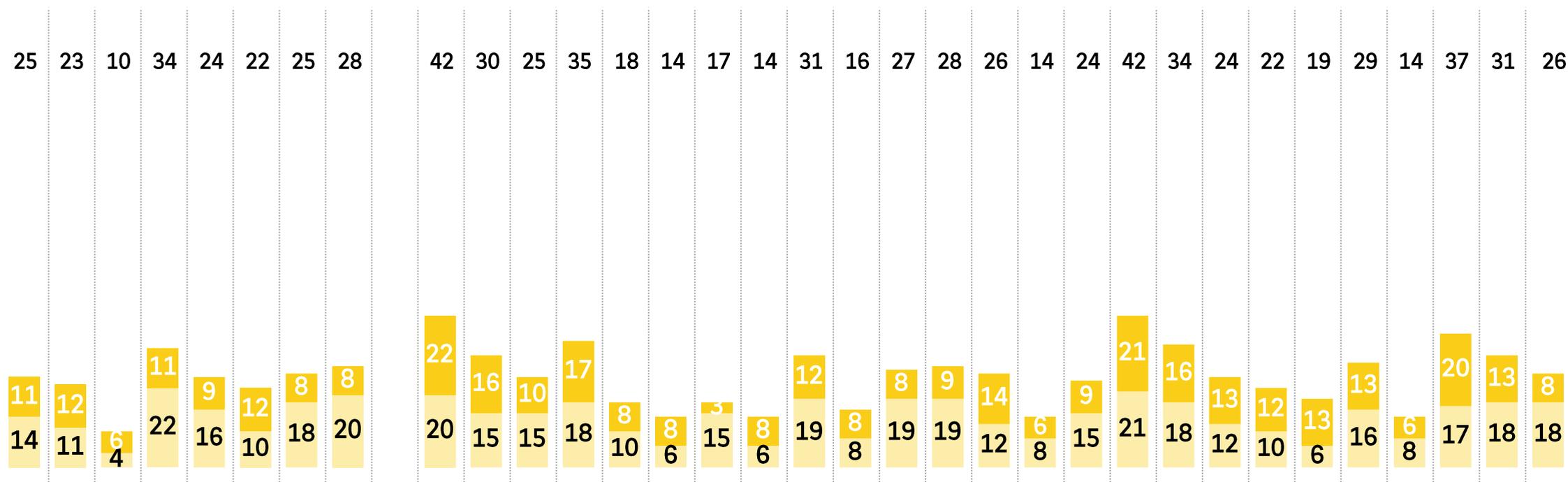
In Australia in 2026, 29% of the companies are already using Private Lease or salary sacrifice or are considering doing so in the next 3 years.

IN %



Already using or consider in the next 12 months

Consider using in the next 3 years
Already using



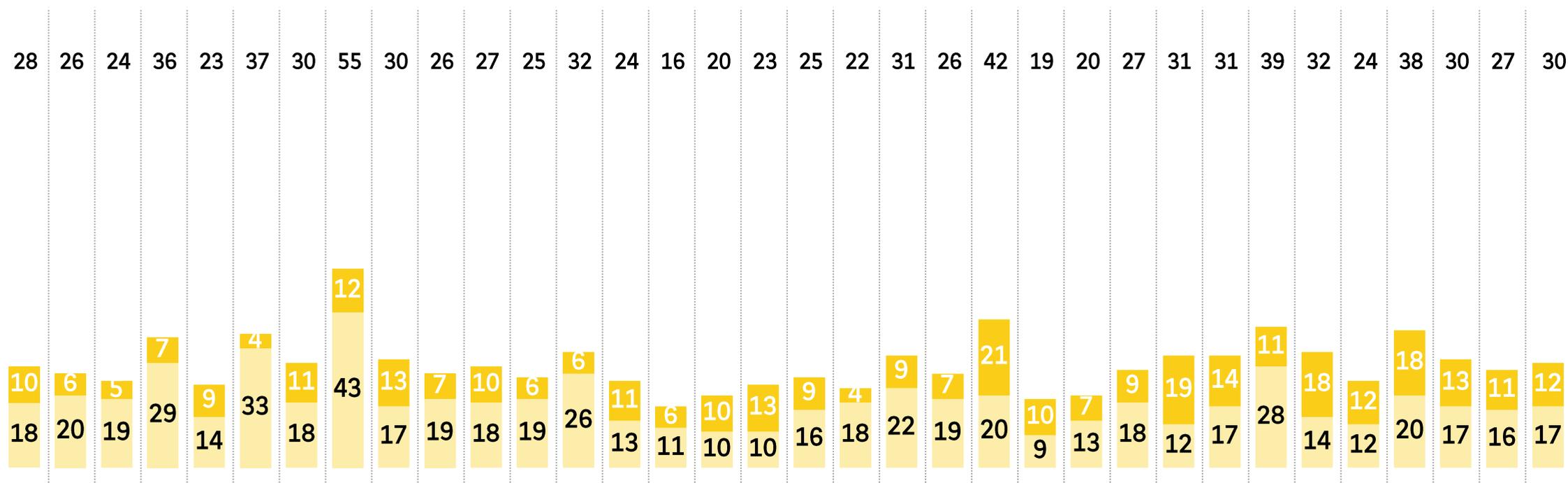
MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

SHORT OR MID TERM RENTAL VEHICLE

HOW TO READ THE RESULTS ?

In Australia in 2026, 24% of the companies are already using short or mid term rental vehicle or are considering doing so in the next 3 years.

IN %

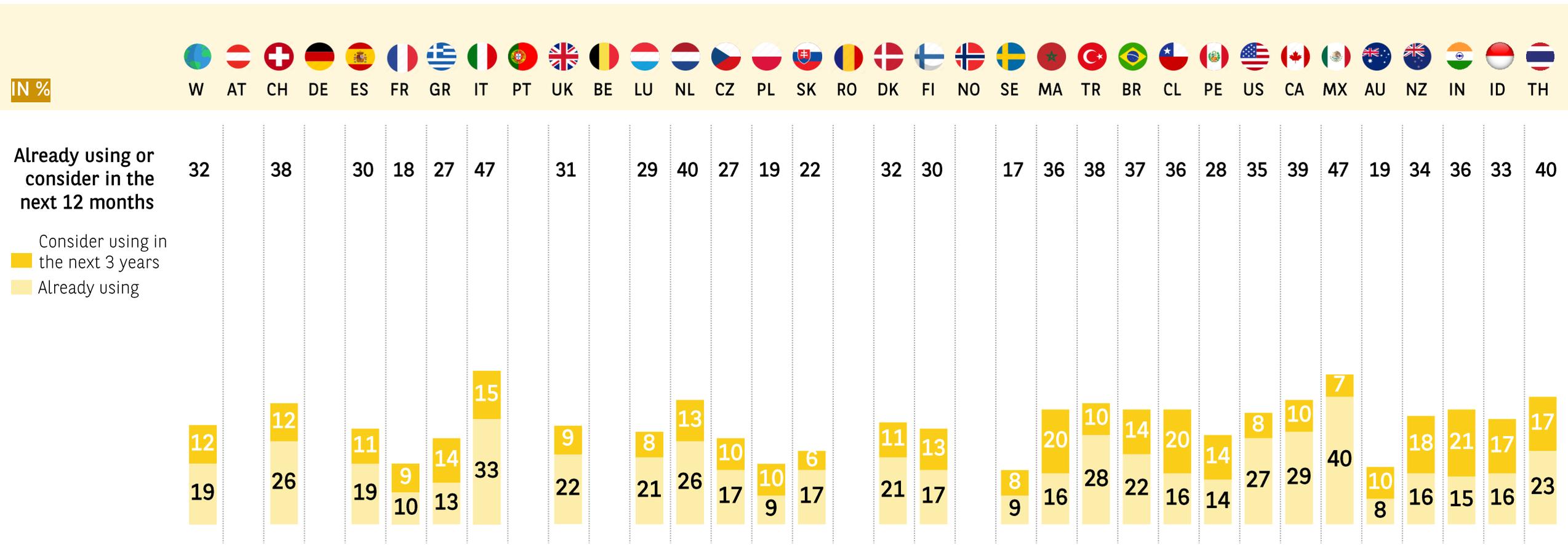


MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

CAR OR CASH ALLOWANCE

HOW TO READ THE RESULTS ?

In Australia in 2026, 19% of the companies are already using Car or cash allowance or are considering doing so in the next 3 years.



MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

CAR SHARING / POOLED VEHICLES

HOW TO READ THE RESULTS ?

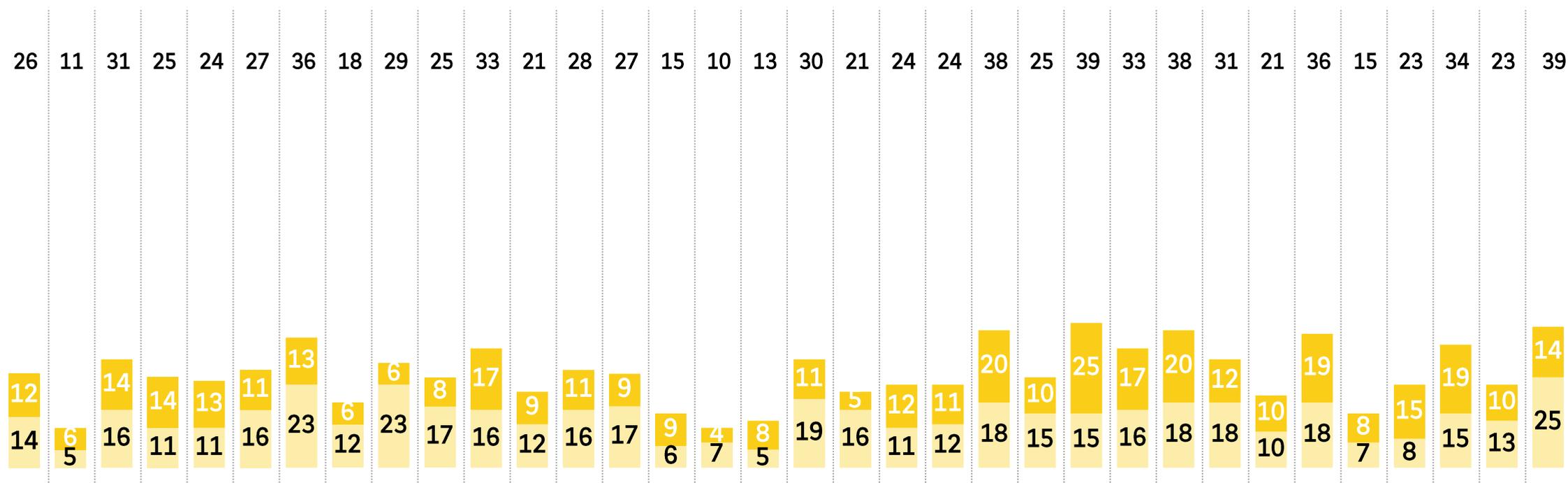
In Australia in 2026, 15% of the companies are already using Car sharing / pooled vehicles or are considering doing so in the next 3 years.

IN %



Already using or consider in the next 12 months

Consider using in the next 3 years
Already using

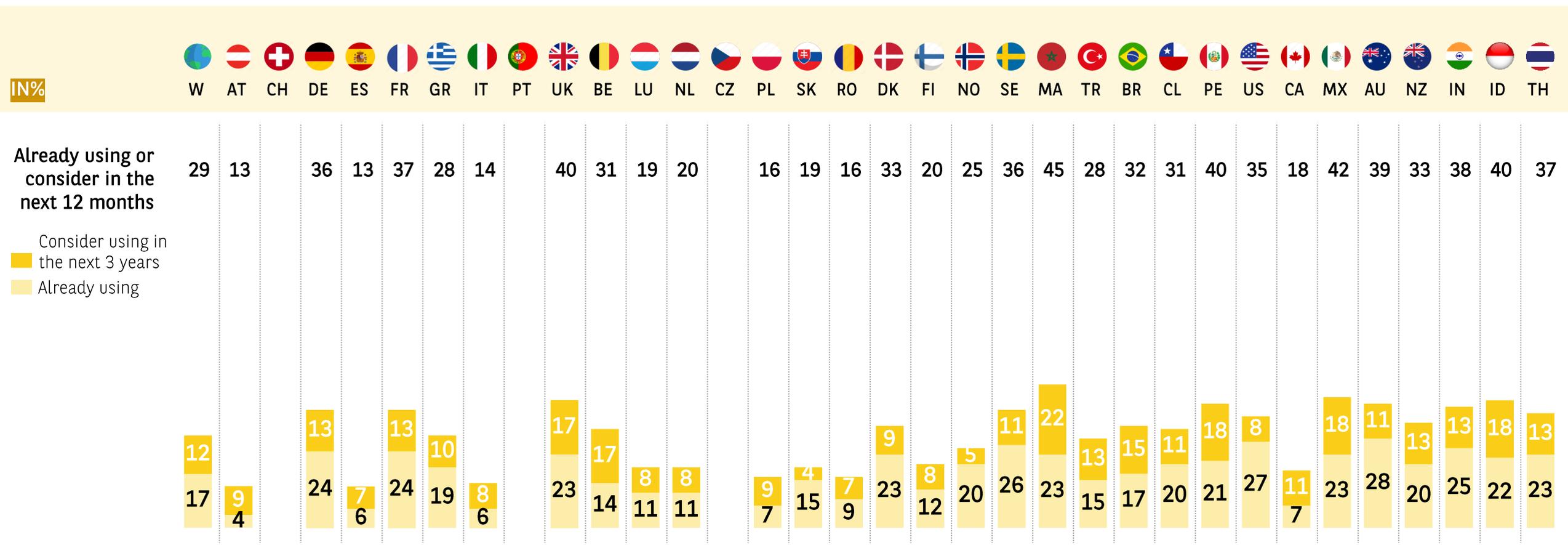


MM15. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

RIDE SHARING / CARPOOLING

HOW TO READ THE RESULTS ?

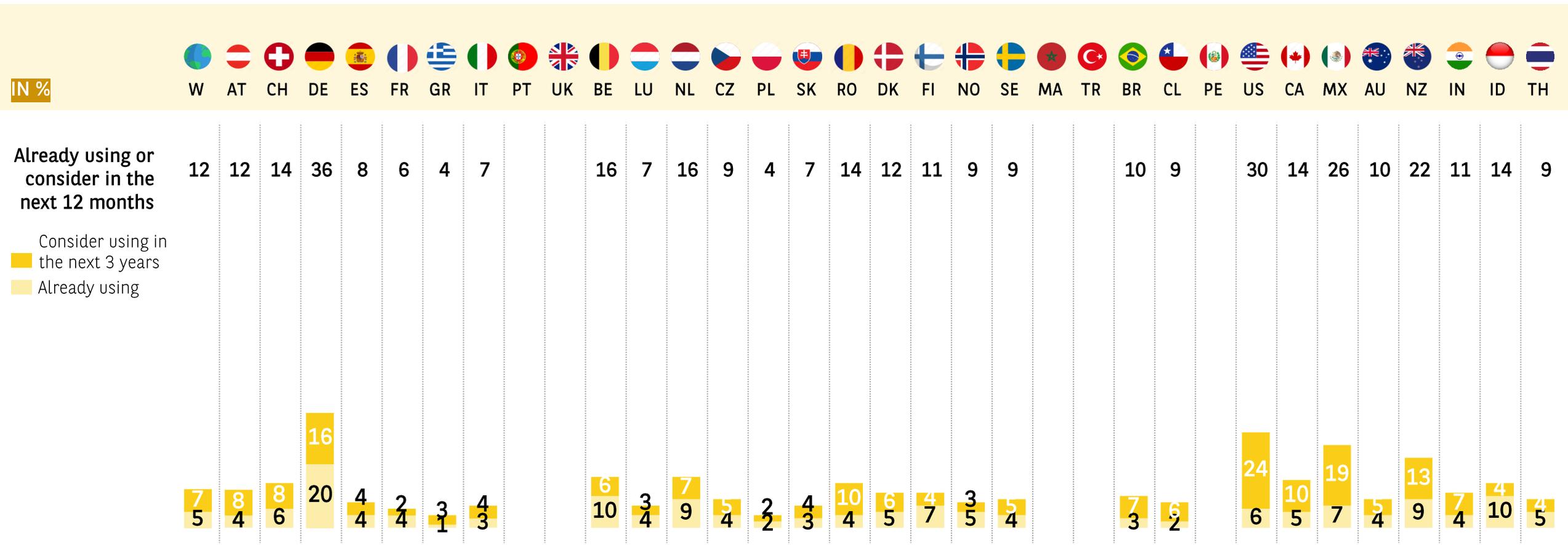
In Australia in 2026, 39% of the companies are already using Ride sharing / carpooling or are considering doing so in the next 3 years.



MM15. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

HOW TO READ THE RESULTS ?

In Australia in 2026, 10% of the companies are already using Bike leasing or are considering doing so in the next 3 years.



MM15. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

HOW TO READ THE RESULTS ?

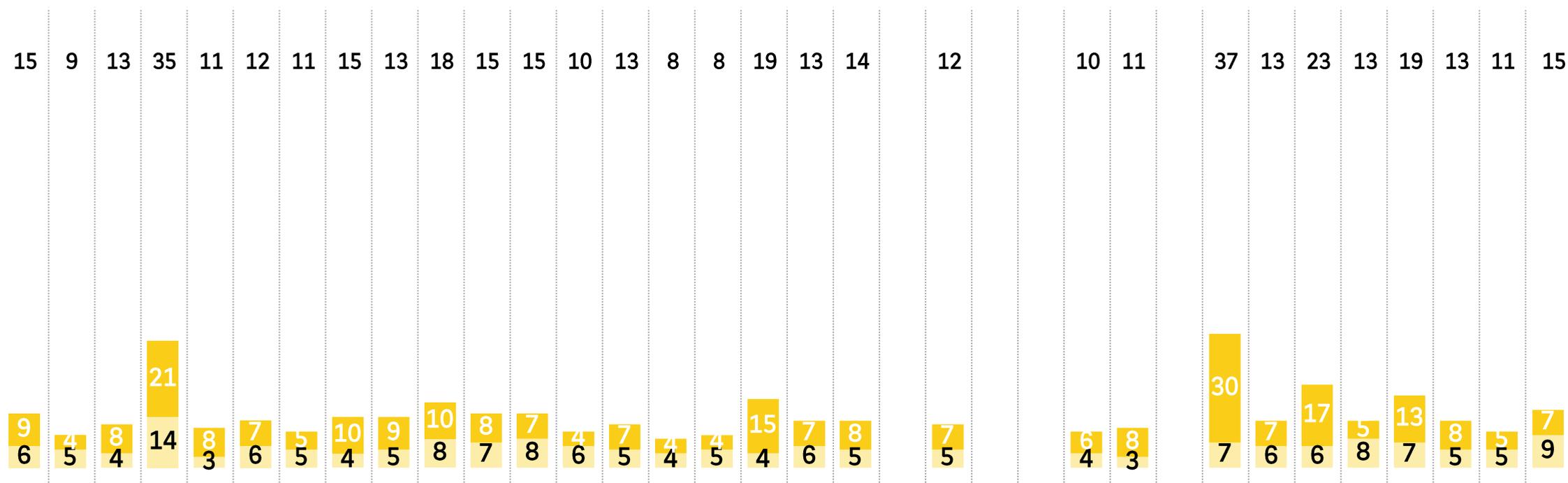
In Australia in 2026, 13% of the companies are already using Bike sharing or are considering doing so in the next 3 years.

IN %



Already using or consider in the next 12 months

Consider using in the next 3 years
Already using



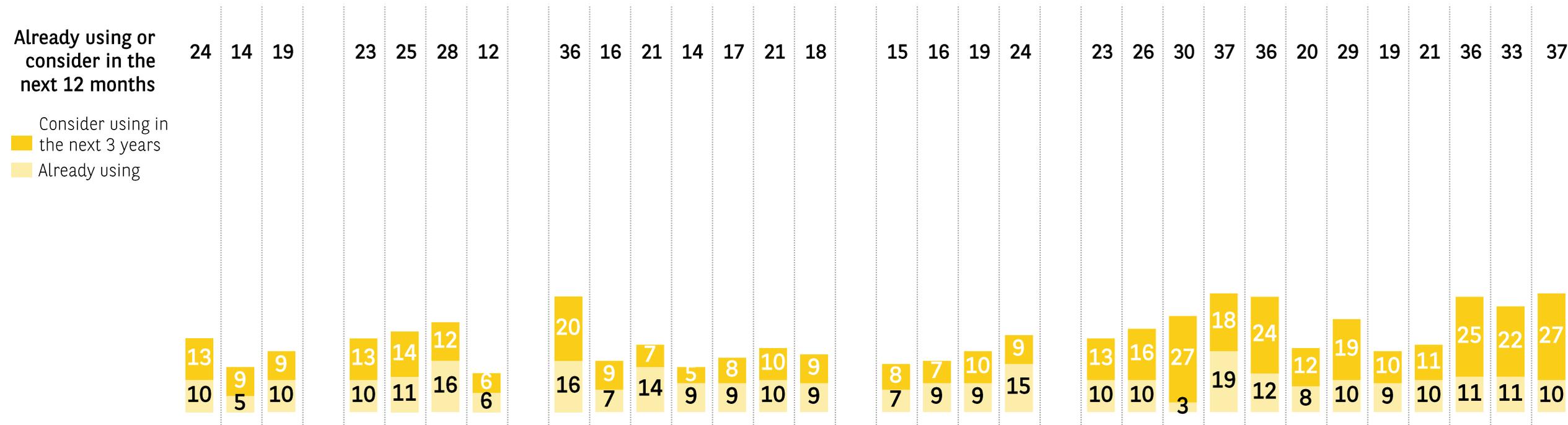
MM15. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

AN APP PROVIDED BY THE COMPANY TO BOOK MULTIPLE MOBILITY SOLUTIONS

HOW TO READ THE RESULTS ?

In Australia in 2026, 19% of the companies are already using An app provided by the company to book multiple mobility solutions or are considering doing so in the next 3 years.

IN %



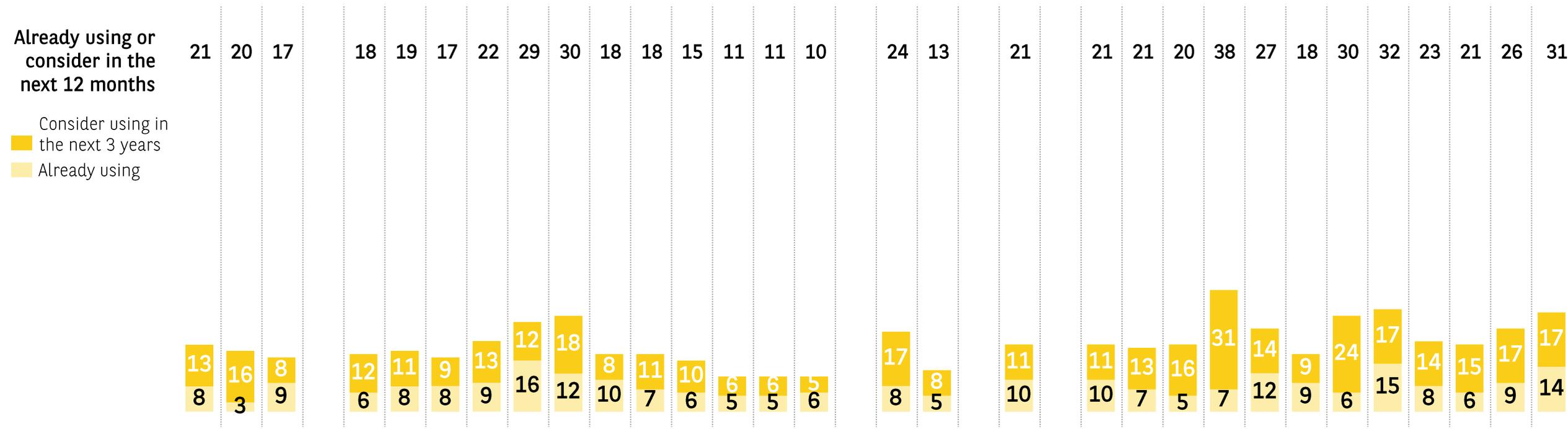
MM15. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

A CARD PROVIDED BY THE COMPANY TO PAY MULTIPLE MOBILITY SOLUTION

HOW TO READ THE RESULTS ?

In Australia in 2026, 32% of the companies are already using A card provided by the company to pay multiple mobility solution or are considering doing so in the next 3 years.

IN %



MM15. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

06

FUTURE CHALLENGES

What are the future challenges for fleet management in the coming years?



Few Australian companies have set targeted decarbonization goals

15% of companies in Australia have set targeted decarbonization goals, and 24% are currently evaluating such goals. A consistent trend with the APAC average. Medium-sized companies are less likely to have set such goals (6%).

Employee mobility is critical, with 14% of companies seeing it as a significant contributor to their decarbonization targets and 38% viewing it as a moderate contributor, aligning with the APAC average.

Mitigating the increase of TCO is the top future challenge in fleet management

53% of Australian companies, consistent with the APAC average, foresee this as their primary challenge over the next three years. Other challenges include adapting to low emission zones in urban areas (36%, which is higher than the APAC average) and adapting to restrictive public policies on internal combustion engines (ICE), with 35% of companies aligning with the APAC average.

Australian fleet managers are seeking innovative solutions to aid in managing their vehicle fleets

47% of Australian fleet managers indicate a need for assistance with fleet performance management, specifically requiring:

- Automated vehicle performance monitoring and predictive maintenance (21%)
- An all-in-one fleet management software / platform (15%)
- Cost control and financial oversight of fleet operations (13%)
- Fuel consumption monitoring and optimization (12%)

28% need help in logistics and fleet operations management, with::

- Fleet allocation, operations coordination and optimization (16%)
- Route and delivery optimization (13%)

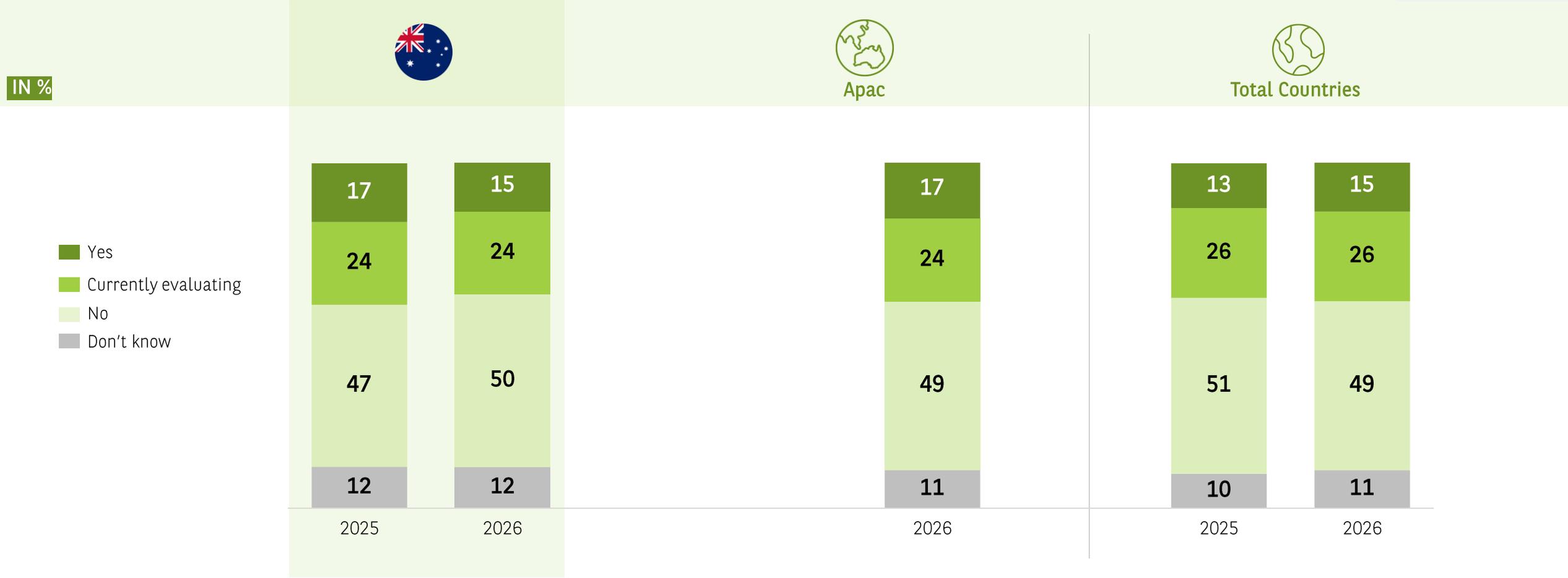
Additionally, 14% need real-time vehicle tracking and monitoring.

DECARBONIZATION GOALS

HOW TO READ THE RESULTS ?

In Australia in 2026, 15% of the companies have targeted decarbonization goals.

Change of question



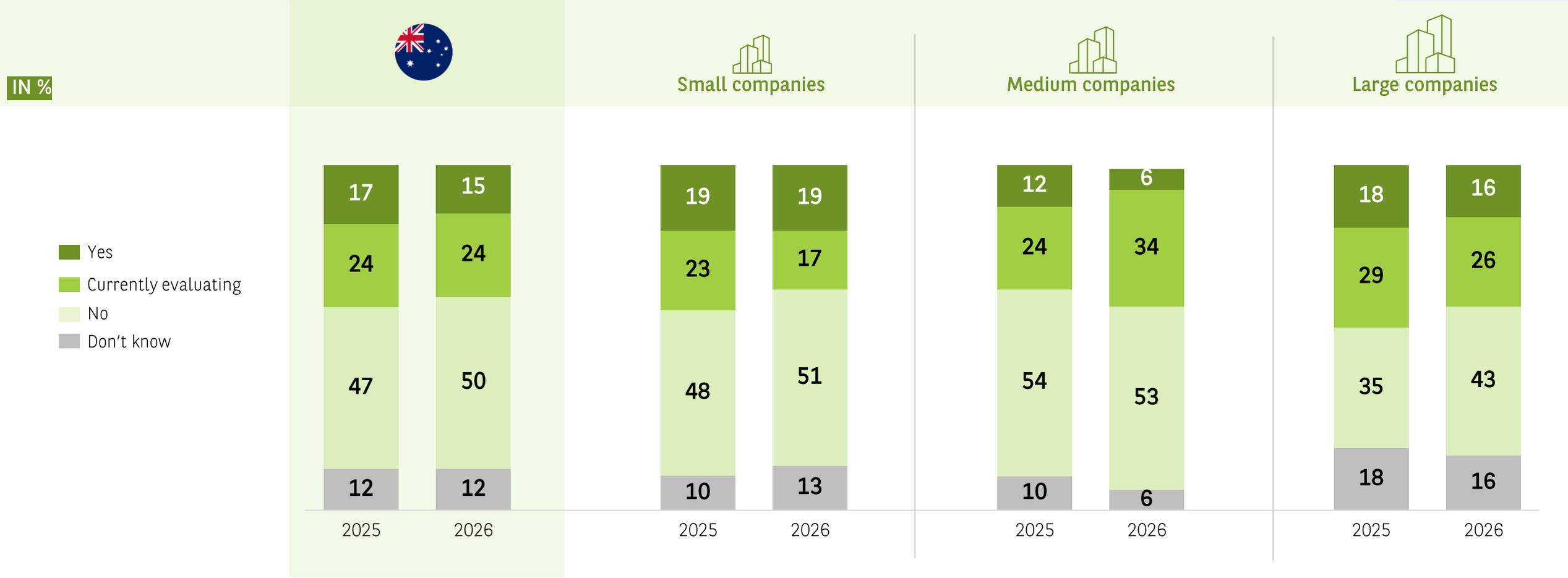
A56. Does your organization have targeted decarbonization goals? It is not limited to fleet, for instance "Net 0"
Basis: companies with corporate vehicles = 100%

DECARBONIZATION GOALS

HOW TO READ THE RESULTS ?

In Australia in 2026, 15% of the companies have targeted decarbonization goals.

Change of question



A56. Does your organization have targeted decarbonization goals? It is not limited to fleet, for instance "Net 0"
Basis: companies with corporate vehicles = 100%

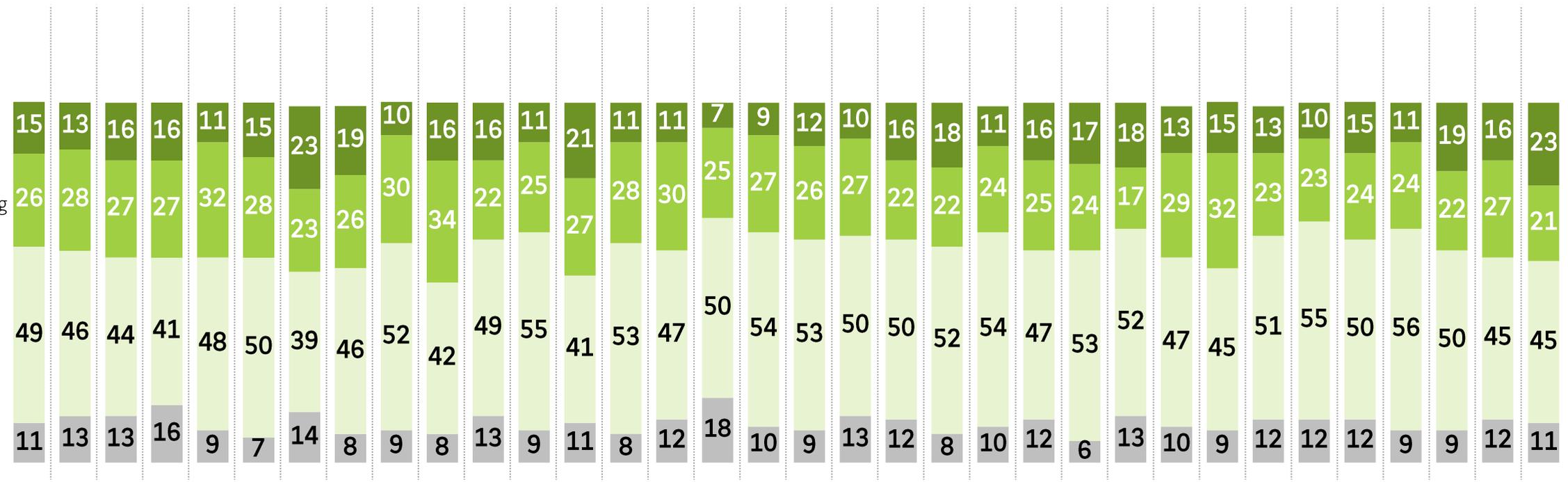
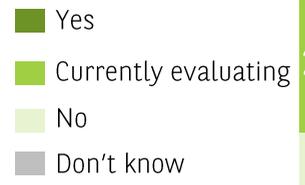
DECARBONIZATION GOALS

HOW TO READ THE RESULTS ?

In Australia in 2026, 15% of the companies have targeted decarbonization goals.

Change of question

IN %

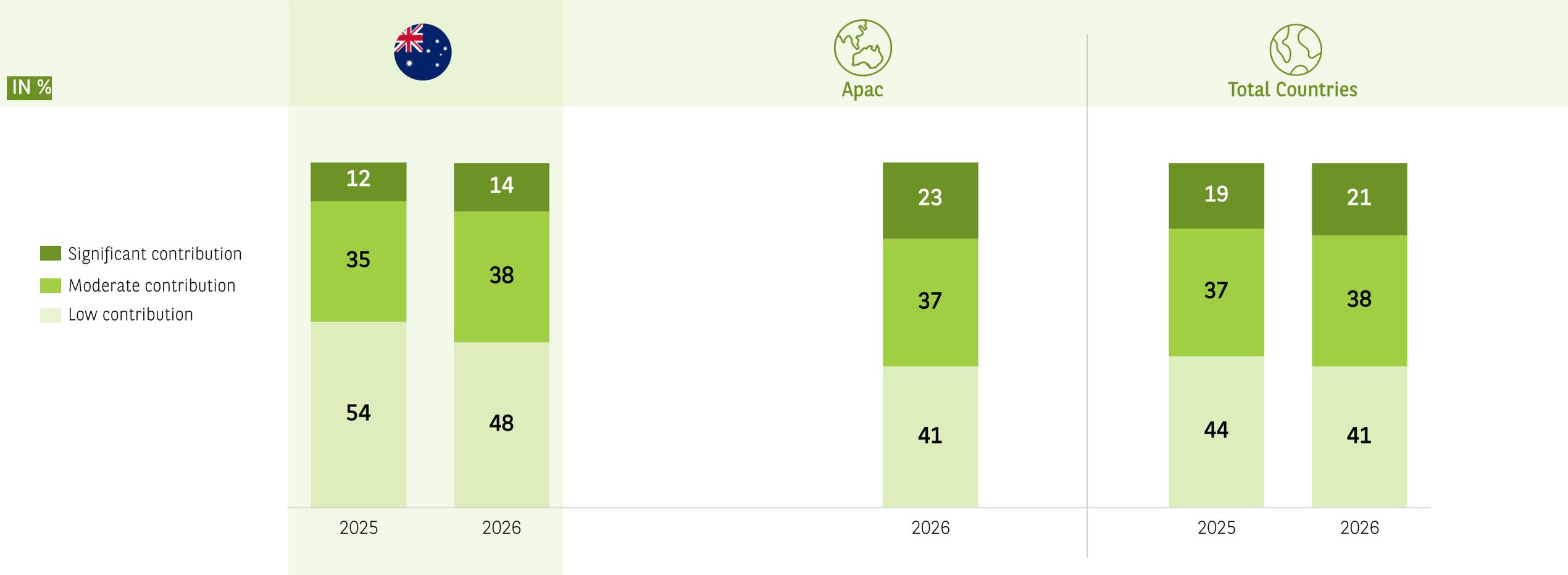


A56. Does your organization have targeted decarbonization goals? It is not limited to fleet, for instance "Net 0"
Basis: companies with corporate vehicles = 100%

IMPORTANCE OF EMPLOYEE'S MOBILITY TO DECARBONIZATION GOALS

HOW TO READ THE RESULTS ?

In Australia in 2026, 14% of the companies that have targeted decarbonization goals rate the contribution of employee's mobility in these decarbonization targets as significant contribution.



A57. How would you rate the contribution of employees' mobility in these decarbonization targets?
Basis: companies that have targeted decarbonization goals

IMPORTANCE OF EMPLOYEE'S MOBILITY TO DECARBONIZATION GOALS

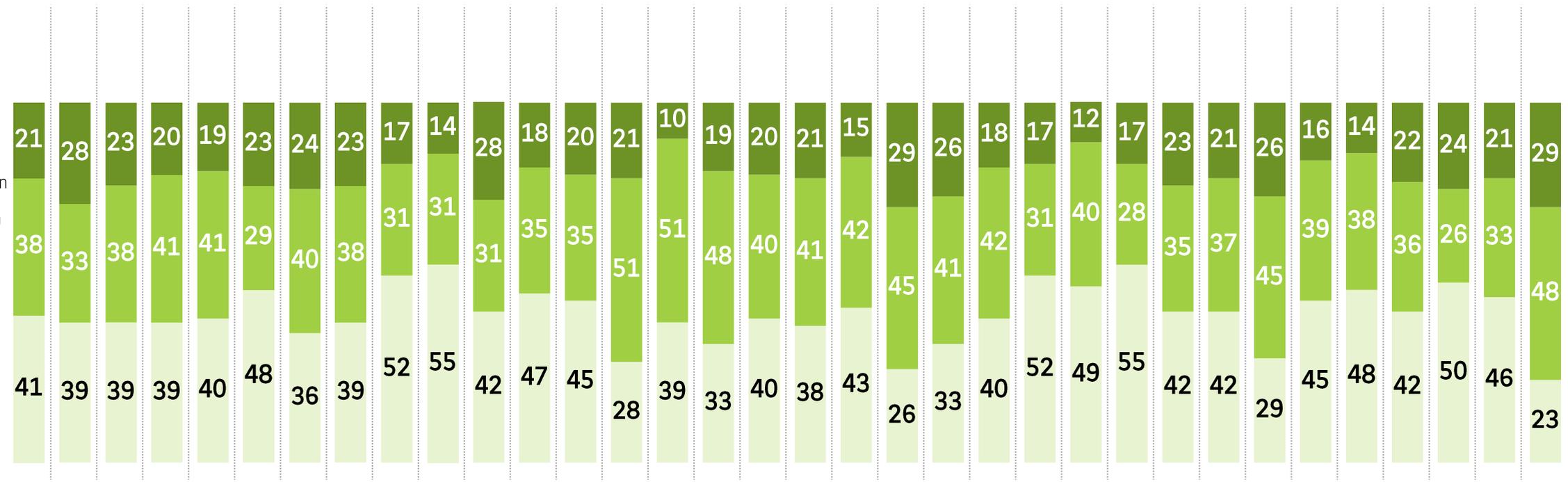
HOW TO READ THE RESULTS ?

In Australia in 2026, 14% of the companies that have targeted decarbonization goals rate the contribution of employee's mobility in these decarbonization targets as significant contribution.

IN %



■ Significant contribution
■ Moderate contribution
■ Low contribution

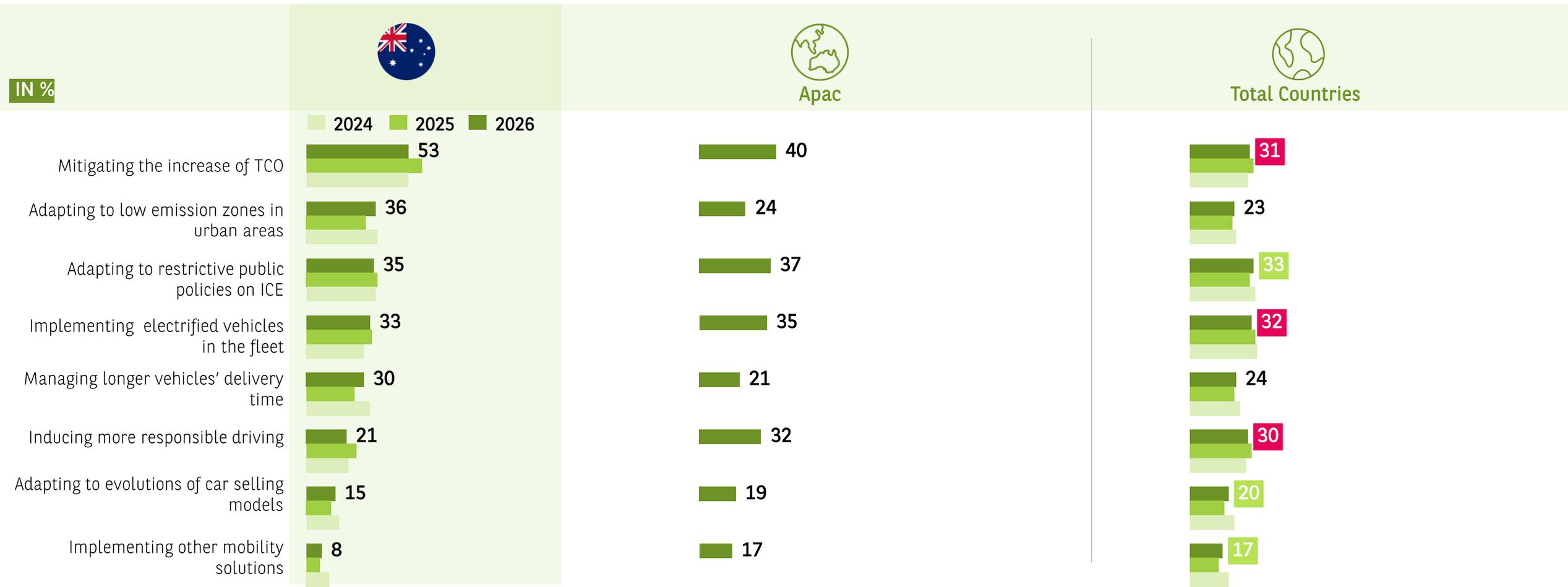


A57. How would you rate the contribution of employees' mobility in these decarbonization targets?
 Basis: companies that have targeted decarbonization goals

THREE MAIN CHALLENGES FOR FLEET MANAGEMENT IN THE N3Y

HOW TO READ THE RESULTS ?

In Australia in 2026, 53% of the companies declare that Mitigating the increase of TCO is in the top 3 challenges for fleet management in the next 3 years.



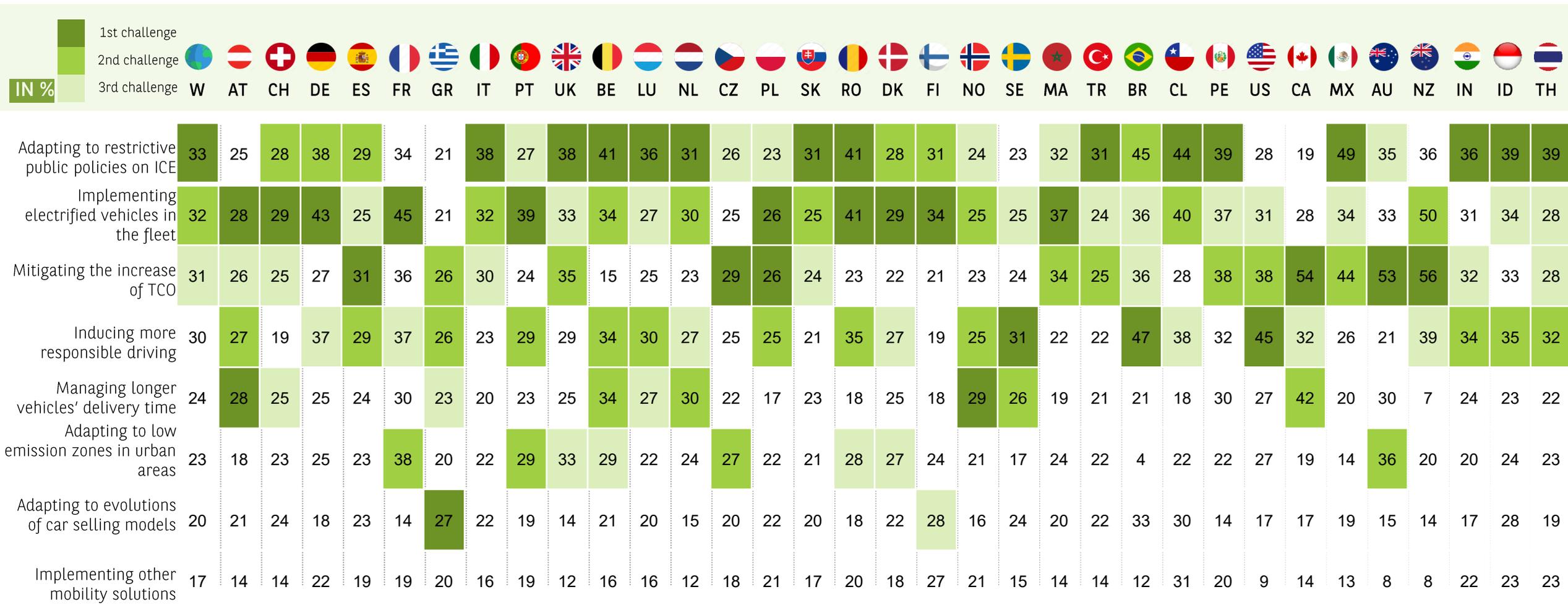
A11. According to you, what will be the three main challenges for fleet management in the next 3 years?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

THREE MAIN CHALLENGES FOR FLEET MANAGEMENT IN THE N3Y

HOW TO READ THE RESULTS ?

In Australia in 2026, 53% of the companies declare that Mitigating the increase of TCO is in the top 3 challenges for fleet management in the next 3 years.



A11. According to you, what will be the three main challenges for fleet management in the next 3 years?
Basis: companies with corporate vehicles = 100%

OPEN-ENDED QUESTION: WHAT WOULD HELP FLEET MANAGERS?

HOW TO READ THE RESULTS ?

In Australia in 2026, 21% of the respondents declare that Automated vehicle performance monitoring and predictive maintenance would help them as a fleet manager.

New question

IN %			
		Apac	Total Countries
Fleet performance management	47%	47%	44%
Automated vehicle performance monitoring and predictive maintenance	21%	21%	18%
An all-in-one fleet management software / platform	15%	15%	14%
Cost control and financial oversight of fleet operations	13%	10%	11%
Fuel consumption monitoring and optimization	12%	13%	13%
Logistics and fleet operations management	28%	30%	27%
Fleet allocation, operations coordination and optimization	16%	16%	14%
Route and delivery optimization	13%	16%	15%
Intelligent cargo and load optimization	2%	2%	2%
Driver and safety	18%	23%	21%
Vehicles real-time tracking and monitoring	14%	18%	17%
Driver management and safety standards implementation	3%	4%	3%
Fleet security and protection systems	1%	2%	2%
Administrative & Compliance	11%	9%	9%
Centralizing and digitizing fleet documentation	9%	7%	7%
Proactive compliance deadline management	2%	2%	2%
Environment & Sustainability	5%	6%	5%
Support for the adoption and management of electric vehicles	2%	2%	2%
Tools and practices for a sustainable fleet management	2%	2%	2%
Vehicle emissions monitoring	2%	2%	2%
Others	21%	18%	22%
Other	20%	17%	20%
Enhanced refrigerated vehicles	1%	2%	2%

A13. From your personal perspective, what would help you with your daily tasks as a fleet manager and enable you to manage your fleet more effectively?

Basis: companies with corporate vehicles = 100%





VERBATIM FOR TOP 3 TOPICS

Automated vehicle performance monitoring and predictive maintenance

21%



Fleet allocation, operations coordination and optimization

16%



An all-in-one fleet management software / platform

15%



"I would like to have a centralised software system to monitor vehicles, deadlines, costs, maintenance and consumption in real time"

"As fleet manager, I would like to monitor the allocation of vehicles between teams and warehouses so that I can guarantee safety and punctuality"

"Having intuitive fleet management software that can provide all the parameters needed to optimise vehicle operations"

A13. From your personal perspective, what would help you with your daily tasks as a fleet manager and enable you to manage your fleet more effectively?
Basis: companies with corporate vehicles = 100%

OPEN-ENDED QUESTION: WHAT WOULD HELP FLEET MANAGERS?

HOW TO READ THE RESULTS ?

In Australia in 2026, 21% of the respondents declare that Automated vehicle performance monitoring and predictive maintenance would help them as a fleet manager.

New question

IN %



	W	AT	CH	DE	ES	FR	GR	IT	PT	UK	BE	LU	NL	CZ	PL	SK	RO	DK	FI	NO	SE
Fleet performance management	44%	41%	47%	45%	44%	46%	39%	36%	48%	46%	41%	40%	42%	45%	38%	40%	47%	45%	41%	43%	43%
Automated vehicle performance monitoring and predictive maintenance	18%	16%	16%	17%	17%	17%	13%	14%	16%	21%	17%	14%	18%	21%	17%	18%	21%	15%	18%	18%	16%
An all-in-one fleet management software / platform	14%	12%	18%	18%	17%	18%	15%	9%	13%	14%	15%	15%	11%	12%	10%	12%	12%	16%	11%	15%	11%
Cost control and financial oversight of fleet operations	11%	9%	12%	10%	11%	14%	7%	11%	15%	13%	12%	12%	8%	9%	10%	8%	12%	15%	14%	12%	10%
Fuel consumption monitoring and optimization	13%	14%	12%	10%	13%	14%	14%	11%	20%	14%	11%	12%	14%	12%	11%	14%	14%	15%	9%	10%	13%
Logistics and fleet operations management	27%	24%	23%	23%	27%	31%	21%	29%	26%	29%	28%	26%	23%	23%	25%	29%	30%	27%	34%	24%	27%
Fleet allocation, operations coordination and optimization	14%	10%	12%	13%	13%	14%	9%	13%	14%	15%	13%	13%	12%	14%	11%	12%	16%	14%	17%	13%	14%
Route and delivery optimization	15%	15%	11%	12%	14%	19%	11%	15%	12%	13%	15%	16%	11%	13%	15%	16%	17%	14%	19%	12%	15%
Intelligent cargo and load optimization	2%	2%	2%	1%	4%	2%	2%	4%	1%	4%	3%	1%	3%	1%	2%	3%	3%	2%	3%	2%	3%
Driver and safety	21%	24%	21%	19%	18%	24%	19%	17%	21%	23%	22%	20%	17%	19%	18%	23%	26%	19%	24%	24%	20%
Vehicles real-time tracking and monitoring	17%	21%	17%	16%	14%	22%	14%	13%	18%	19%	19%	18%	13%	15%	16%	19%	21%	15%	18%	21%	16%
Driver management and safety standards implementation	3%	4%	3%	3%	3%	2%	4%	2%	2%	2%	3%	2%	3%	2%	1%	3%	3%	2%	3%	2%	4%
Fleet security and protection systems	2%	2%	3%	1%	2%	1%	4%	2%	1%	4%	0%	1%	2%	3%	2%	4%	3%	3%	4%	2%	2%
Administrative & Compliance	9%	8%	10%	13%	12%	5%	8%	14%	7%	10%	6%	7%	14%	8%	9%	9%	6%	10%	5%	7%	12%
Centralizing and digitizing fleet documentation	7%	6%	7%	11%	9%	4%	6%	8%	5%	8%	5%	5%	12%	6%	6%	7%	5%	8%	4%	6%	10%
Proactive compliance deadline management	2%	2%	2%	3%	3%	1%	2%	6%	3%	3%	1%	2%	3%	2%	3%	1%	1%	2%	1%	2%	2%
Environment & Sustainability	5%	6%	5%	5%	7%	6%	3%	6%	8%	5%	5%	6%	7%	4%	2%	5%	3%	6%	6%	5%	5%
Support for the adoption and management of electric vehicles	2%	2%	1%	2%	4%	3%	1%	4%	3%	2%	2%	3%	2%	3%	1%	3%	1%	2%	2%	1%	2%
Tools and practices for a sustainable fleet management	2%	2%	3%	2%	2%	2%	1%	1%	3%	2%	2%	3%	4%	0%	1%	2%	1%	3%	2%	2%	2%
Vehicle emissions monitoring	2%	2%	1%	2%	1%	2%	2%	1%	3%	1%	1%	2%	3%	1%	0%	1%	1%	3%	3%	2%	2%
Others	22%	24%	20%	22%	20%	22%	24%	27%	19%	23%	25%	21%	25%	23%	29%	23%	20%	23%	22%	22%	19%
Other	20%	22%	20%	21%	19%	20%	23%	26%	18%	20%	24%	20%	23%	21%	27%	22%	17%	21%	20%	20%	18%
Enhanced refrigerated vehicles	2%	2%	0%	1%	0%	2%	2%	1%	1%	2%	1%	1%	1%	2%	2%	2%	2%	2%	3%	2%	1%

A13. From your personal perspective, what would help you with your daily tasks as a fleet manager and enable you to manage your fleet more effectively?
Basis: companies with corporate vehicles = 100%



OPEN-ENDED QUESTION: WHAT WOULD HELP FLEET MANAGERS?

HOW TO READ THE RESULTS ?

In Australia in 2026, 21% of the respondents declare that Automated vehicle performance monitoring and predictive maintenance would help them as a fleet manager.

New question

IN %



	W	MA	TR	BR	CL	PE	US	CA	MX	AU	NZ	IN	ID	TH
Fleet performance management	44%	39%	45%	46%	45%	47%	45%	49%	47%	47%	47%	43%	51%	45%
Automated vehicle performance monitoring and predictive maintenance	18%	17%	21%	19%	18%	14%	20%	26%	19%	21%	19%	17%	27%	22%
An all-in-one fleet management software / platform	14%	13%	13%	13%	12%	15%	16%	13%	16%	15%	15%	16%	15%	15%
Cost control and financial oversight of fleet operations	11%	6%	12%	12%	15%	14%	10%	10%	12%	13%	11%	11%	9%	8%
Fuel consumption monitoring and optimization	13%	11%	12%	14%	14%	18%	11%	15%	12%	12%	17%	12%	15%	12%
Logistics and fleet operations management	27%	24%	24%	27%	29%	33%	30%	26%	32%	28%	34%	32%	24%	31%
Fleet allocation, operations coordination and optimization	14%	9%	13%	14%	15%	16%	13%	11%	19%	16%	20%	14%	11%	17%
Route and delivery optimization	15%	15%	13%	16%	14%	21%	17%	15%	21%	13%	15%	20%	12%	19%
Intelligent cargo and load optimization	2%	2%	1%	0%	3%	3%	3%	1%	1%	2%	3%	2%	1%	2%
Driver and safety	21%	19%	19%	17%	21%	17%	30%	17%	22%	18%	19%	27%	25%	25%
Vehicles real-time tracking and monitoring	17%	15%	15%	13%	18%	13%	25%	14%	18%	14%	15%	21%	21%	20%
Driver management and safety standards implementation	3%	2%	3%	2%	2%	3%	3%	3%	4%	3%	3%	4%	5%	5%
Fleet security and protection systems	2%	4%	3%	3%	3%	4%	2%	1%	1%	1%	2%	4%	0%	2%
Administrative & Compliance	9%	9%	7%	11%	11%	11%	8%	11%	11%	11%	7%	12%	9%	7%
Centralizing and digitizing fleet documentation	7%	8%	6%	9%	10%	7%	6%	9%	9%	9%	6%	9%	8%	4%
Proactive compliance deadline management	2%	2%	1%	3%	2%	3%	2%	2%	3%	2%	1%	3%	1%	3%
Environment & Sustainability	5%	5%	7%	8%	4%	4%	5%	7%	5%	5%	8%	5%	7%	3%
Support for the adoption and management of electric vehicles	2%	3%	3%	3%	2%	2%	3%	3%	2%	2%	3%	1%	2%	1%
Tools and practices for a sustainable fleet management	2%	1%	4%	3%	2%	2%	2%	3%	2%	2%	3%	2%	4%	1%
Vehicle emissions monitoring	2%	1%	2%	3%	1%	2%	0%	3%	2%	2%	3%	2%	2%	1%
Others	22%	25%	25%	21%	21%	19%	17%	21%	17%	21%	16%	16%	18%	22%
Other	20%	24%	21%	21%	19%	16%	14%	19%	16%	20%	15%	14%	16%	21%
Enhanced refrigerated vehicles	2%	2%	4%	0%	2%	3%	2%	1%	2%	1%	1%	3%	3%	1%

A13. From your personal perspective, what would help you with your daily tasks as a fleet manager and enable you to manage your fleet more effectively?

Basis: companies with corporate vehicles = 100%

Administrative & Compliance	Proactive compliance deadline management (insurance, inspections, licenses, regulatory requirements)	Proactive reminder systems that notify users about upcoming insurance renewals, vehicle inspection dates, license expirations, and regulatory requirement deadlines. Fleet managers seek integrated platforms that reduce manual tracking burden and prevent costly lapses in compliance coverage.
	Centralizing and digitizing fleet documentation (insurances, maintenance, invoices)	Automated systems that can store, organize, and manage vehicle-related documentation (insurance papers, maintenance records, invoices, and inspection certificates). It reduces paperwork burden through digital transformation, provides automatic reminders for important deadlines, and centralizes all fleet documentation in easily accessible platforms.
Driver and safety	Driver management and safety standards implementation	Solutions that help monitor and improve driver performance, facilitate driver scheduling and shift management, and implement safety measures to prevent accidents and ensure secure transportation. It encompasses training programs for safe driving practices, telematics systems for real-time monitoring of driver behavior, safety equipment installation (cameras, sensors), and management platforms that provide comprehensive oversight of driver activities.
	Fleet security and protection systems	Anti-theft systems (remote locking, immobilizers), cargo and equipment protection during transport, driver and vehicle monitoring through dashcams and telematics, and access control systems (badges, PIN codes). It encompasses both preventive security measures and real-time monitoring capabilities.
	Vehicles real-time tracking and monitoring	GPS tracking systems, telematics platforms, fleet monitoring software, sensor-based condition monitoring, and integrated management dashboards that provide instant oversight of vehicle utilization.
Environment & Sustainability	Support for the adoption and management of electric vehicles	Electric vehicle adoption support, including battery performance monitoring, charging infrastructure access, and specialized training for electric vehicle operation. It includes tools that help evaluate the cost-effectiveness of switching from traditional to electric vehicles. Fleet managers seek both the technology and knowledge needed to successfully implement sustainable transportation solutions while reducing operational costs and environmental impact.
	Tools and practices for a sustainable fleet management	Tools and technologies that help track carbon footprint, implement sustainable driving practices, and transition to electric fleets. It encompasses solutions such as eco-driving training programs, fleet electrification support services...
	Vehicle emissions monitoring	Measurement tools, sensors, and diagnostic systems that can track vehicle pollution levels, alert when emissions exceed acceptable limits, and support decision-making for fleet renewal.



Fleet performance management	An all-in-one fleet management software / platform	Centralized dashboards that provide real-time visibility into fleet performance, costs, maintenance, and operations through customizable reporting and analytics. An all-in-one management software that combines data from various sources (telematics, maintenance, fuel consumption, scheduling) into easy-to-understand visual displays.
	Automated vehicle performance monitoring and predictive maintenance	Automated systems / platforms that continuously monitor vehicle conditions, performance, component status, and maintenance schedules while delivering real-time alerts and notifications to prevent unexpected breakdowns and optimize fleet operations. It means transitioning from reactive maintenance approaches to predictive, data-driven strategies.
	Cost control and financial oversight of fleet operations	Digital platforms and management systems that track fleet-related expenses (fuel costs, maintenance expenses, insurance costs, overall operational spending) and provide detailed cost breakdowns, expense forecasting, budget management capabilities. It encompasses solutions ranging from fuel card management systems and maintenance cost scheduling to comprehensive financial dashboards that enable total cost of ownership calculations and cost-reduction strategies across the entire fleet.
	Fuel consumption monitoring and optimization	Automated tracking systems that provide real-time fuel data, consumption reports, and alerts to identify inefficiencies or anomalies. Fleet managers seek solutions that combine both technological solutions (sensors, automated reporting systems, dashboards) and strategic approaches (driver education, route planning).
Logistics and fleet operations management	Fleet allocation, operations coordination and optimization	Tools that streamline vehicle allocation, coordinate driver assignments, track fleet status and availability, and improve overall transport efficiency. Fleet managers seek integrated systems that can automate scheduling, provide real-time fleet visibility, optimize resource utilization, and facilitate better communication between dispatchers and drivers. It encompasses solutions ranging from vehicle tracking and maintenance management to intelligent dispatch systems and automated shift planning tools.
	Intelligent cargo and load optimization	Systems that can monitor vehicle capacity, optimize loading based on cargo volume and destination, and track load conditions in real-time including specialized monitoring for fragile or sensitive cargo. The focus is on maximizing efficiency by reducing unnecessary trips, ensuring optimal vehicle utilization throughout the transportation process, and maintaining cargo integrity through intelligent monitoring of transport conditions.
	Route and delivery optimization	Digital tools and software that can plan optimal routes, track vehicles in real-time, manage delivery schedules, and coordinate logistics operations. Fleet managers seek integrated platforms that combine route planning with performance monitoring and predictive capabilities to minimize delays and reduce costs. It encompasses solutions ranging from AI-powered route optimization software and GPS tracking systems to centralized management platforms that coordinate vehicles, equipment, and personnel for improved delivery performance.
Others	Enhanced refrigerated vehicles	Refrigerated vehicles equipped with real-time temperature monitoring systems, sensors that track climate conditions, and automated alert mechanisms to prevent cold chain interruptions.
	Others	Minor topics that have not been assigned to the code frame.

APPENDIX



Vehicles in fleets

- **PC:** Passenger Cars
- **LCVs:** Light Commercial Vehicles
- **Second-hand vehicles:** Vehicles that were not new when acquired. "Not new" means already used by others outside the company. It does not consider 0 km pre-registered cars from dealers/OEMs.

Financing methods

- **Operational Leasing / Full Service Leasing with residual value risk for the lessor:** a service which, in exchange for a monthly rental, enables the customer to have a vehicle for a defined amount of time and mileage with associated optional services. The customer chooses the vehicle along with the associated optional services such as maintenance, insurance, fuel management, breakdown and replacement vehicle, tyre replacement...
- **Financial leasing with residual value risk for the lessee:** can be defined as renting a vehicle with the possibility to buy it at the end of the contract, for a price agreed at the beginning of the contract
- **Outright purchase / Direct purchase:** Using customer's own funds (cash or bank loan)

Electrified vehicles technologies

- **BEV (Battery Electric Vehicle):** Powered only by electricity using energy stored in rechargeable batteries
- **PHEV (Plug-in Hybrid):** Combines a petrol or diesel engine with an electric motor and a battery that can be recharged by plugging into an electrical outlet
- **HEV (Hybrid):** Combines a petrol or diesel engine with an electric motor and small battery, with no possibility to recharge by plugging into an electrical outlet
- **Hydrogen Fuel cell:** Uses hydrogen fuel for motive power (not related to pilot test of a vehicle)
- **FlexFuel:** Can be powered on different fuels or blends (e.g. ethanol, LPG)

Telematics

- **Telematics** enables transmission of data to the fleet manager to monitor fuel consumption, driver behaviour, vehicle location, driver's impact on environment... from vehicles on the move. Data is transmitted by means of a car manufacturer box or by an after sales box installed in the vehicle. Telematics do not include data transmission by the means of the users' smartphones.

Mobility policies

- **Public transport expense reimbursement** (partial or total)
- **Personal vehicle expense reimbursement** (partial or total)
- **Mobility Budget**: predefined budget granted by the employer allowing employees to choose their mode of transport
- **Private lease or salary sacrifice**: private lease where an employee leases a car on his own behalf / salary sacrifice where an employee leases a car via their employer
- **A short or mid-term rental vehicle** to provide mobility for an employee
- **Car or cash allowance**

Mobility solutions

- **Car sharing or pooled/unassigned vehicles**: a pool of cars put at your disposal by your company that can be booked and used for professional or personal use.
- **Ride sharing**: arranging for travel between several parties in a private vehicle driven by its owner, free or for a fee, by means of a website or app provided by your company
- **Car pooling**: meaning in exchange for a payment
- **Bike Leasing**: solution provided by the company
- **Bike Sharing**: solution provided by the company
- **Scooter and moto leasing**: solution provided by the company
- **An app** provided by the company to book multiple mobility solutions
- **A card** provided by the company to pay multiple mobility solution

Charging policies

- **Partial financing:** A shared-cost model where the employer covers a portion (e.g. 50%) of the purchase/installation costs of charging solutions at employee's homes
- **Lump-sums:** A fixed allowance paid by the employer for purchase/installation of charging solutions at employee's homes
- **Smart Cable:** Charging cable with technologies and features beyond traditional cable, such as adjustable charging speed or charging cost / reimbursement data management
- **Reinforced sockets for charging:** Upgraded version of a regular socket, with a bigger maximum output. It's usually made for indoor and outdoor installation and comes with a locking mechanism

Future challenges

- **Car-selling models:** Contractual models that define who signs the leasing contract and who carries the financial responsibility. Three models:
 - B2B (company signs; company is fully responsible),
 - B2B2E (employee signs under employer facilitated scheme; employee is financially responsible),
 - B2C/Retail (private individual signs and bears all responsibilities).

COMPANY SIZE SEGMENT DEFINITION



AT CH DE ES FR GR IT PT UK BE LU NL CZ PL SK RO DK FI NO SE MA TR BR CL PE US CA MX AU NZ IN ID TH

 Small companies
 Medium companies
 Large companies

	AT	CH	DE	ES	FR	GR	IT	PT	UK	BE	LU	NL	CZ	PL	SK	RO	DK	FI	NO	SE	MA	TR	BR	CL	PE	US	CA	MX	AU	NZ	IN	ID	TH	
Less than 99 empl.	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	
100 - 249 empl.	●					●					●				●		●	●	●	●	●	●		●	●			●	●	●	●	●	●	
100 - 499 empl.		●		●				●		●		●	●	●		●							●					●						
100 - 999 empl.			●		●		●		●																	●								
250 empl. or more	●					●					●				●		●	●	●	●	●	●	●		●	●			●	●	●	●	●	
500 empl. or more		●		●				●		●		●	●	●		●							●					●						
1000 empl. or more			●		●		●		●																		●							

STATISTICAL FOCUS: SIGNIFICANT EVOLUTIONS

WHAT IS IT?

This barometer monitors changes between waves.

We use **significance tests** to determine whether an observed increase or decrease is likely to be a market reality or a random variation. These tests are statistical methods that determine whether the results of a survey are likely to be true or occurred by chance.



The gap between 10% and 23% is large enough
→ the increase is significant

The gap between 55% and 59% is too small
→ there is no increase

HOW DOES IT WORK?

The significance of the test depends on the **sample size**: significant evolutions appear with larger samples, whereas smaller samples require larger evolutions to be considered significant.

Also, for statistical reasons, the required evolution depends on the result of the KPI being tested.

⇒ According to the sample size and the KPI result, the required evolution to make the increase/decrease significant is :

	KPI = 5%	KPI = 50%
Sample = 300 interviews (1 country)	At least 2.5 points	At least 5.7 points
Sample = 6,000 interviews (Europe)	At least 0.6 point	At least 1.3 point
Sample = 10,000 interviews (Global)	At least 0.4 point	At least 1 point

Warning: if the KPI is a filtered question (i.e. not asked of all respondents), the sample size is smaller, and the required evolution is larger.

THANK YOU