

FLEET AND MOBILITY BAROMETER 2026

GLOBAL 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



READING NOTES ABOUT THE REPORT

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

RESEARCH OBJECTIVES



What short term shifts
are shaping the market?

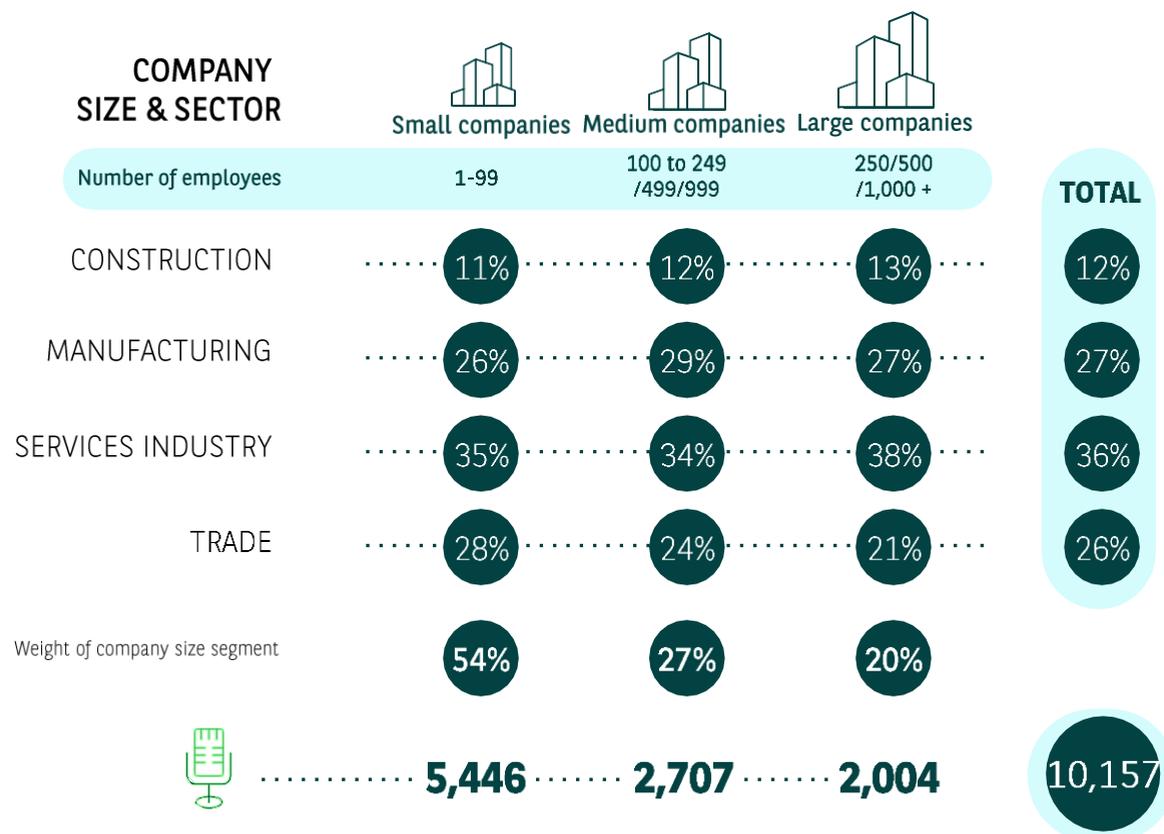


What kind of vehicles will
the market expect in 3 years?



How do mobility solutions
impact corporate mobility?

QUOTAS ON COMPANY SIZE & INDUSTRY



33 COUNTRIES - 4 REGIONAL BENCHMARKS



Morocco and Turkey: compared with Europe benchmark



MOST COMPANIES REMAIN CONFIDENT ABOUT THEIR FLEETS' FUTURE GLOBALLY, WHILE SECOND-HAND VEHICLES KEEP INCREASING

91% anticipate their fleet will either remain stable or grow in the next 3 years (with 27% expecting growth globally, but more cautious anticipations in Europe)

45% include second-hand vehicles in their fleets, with a significant increase compared to 2025 (especially in LATAM), but with persistent differences across countries



A STABLE AND SIGNIFICANT GROWTH POTENTIAL FOR FULL-SERVICE LEASING GLOBALLY, WITH PERSISTING DISCREPANCIES

37% intend to introduce or increase their use of full-service leasing to finance their fleet, in line with 2025, with stronger potential in LATAM and Asia

Among companies using or considering second-hand vehicles, **29%** use or plan to use operational leasing as their main financing method



FLEET ELECTRIFICATION BUILDS ON RECENT MOMENTUM WHILE REGIONAL DISPARITIES REMAIN SIGNIFICANT

66% already use electrified passenger cars or consider to do so – with strong discrepancies between Europe and North America (leading and stable), and APAC and LATAM

48% of fleet managers claim they would take all necessary measures to comply if regulations required an exclusive switch of passenger cars to BEVs by 2030, while **46%** would offer a mobility budget instead of a company car



DESPITE WIDESPREAD TELEMATICS ADOPTION, DATA USAGE LAGS BUT SHOWS PROMISING GROWTH

40% have adopted telematics, stable overall, led by North America and LATAM, both increasing this year

Only **17%** of them use telematics data. This share is slightly increasing, driven by security and operational efficiency concerns.



GLOBALLY, MOBILITY POLICIES AND SOLUTIONS ARE EVOLVING, FUELED BY HR NEEDS, CSR INITIATIVES IN EUROPE, AND REGULATORY FRAMEWORKS WORLDWIDE

94% of companies have implemented at least one mobility policy or solution or are planning to do so (a 5-point increase).

26% are already using Car sharing or are considering doing so in the next 3 years



AWARENESS OF DECARBONIZATION IS GROWING, SPARKING KEEN INTEREST IN FLEET OPTIMIZATION SUPPORT

41% are evaluating or have set targeted decarbonization goals to date, ICE restrictions and fleet electrification being on top of the agenda, closely followed by TCO

44% are looking for innovative solutions that enhance fleet performance management (including TCO)

01

FLEET CHARACTERISTICS

What are the key characteristics of fleets?



Most companies remain confident about their fleet prospects for 2026

Overall, 91% of companies foresee their fleet size remaining stable or expanding over the next three years, with a notable 27% anticipating growth. This optimism mirrors last year's sentiment and is across businesses of all sizes.

- European companies show a more cautious outlook, with 22% expecting fleet growth, maintaining last year's projections for 2025.
- LATAM and North America are the most optimistic regions, with 33% projecting a fleet increase, sustaining their positive trend.
- The APAC markets are in between, with 25% expecting fleet expansion.

Projections for fleet growth paint a diverse picture across the European and LATAM markets

In Europe, a promising 37% of Greek companies and 33% of British companies anticipate fleet expansion. In contrast, only 13% of Swiss and Portuguese companies share this optimism.

The same disparity can be seen in LATAM, with 48% of companies in Peru compared to just 19% in Brazil.

The adoption of second-hand vehicles is on the rise

Overall, 45% of companies already include second-hand vehicles in their fleet, a 4-point increase compared to last year, quite consistent across company sizes. This increase is mainly driven by LATAM, with 57% of companies participating (a 10-point increase).

Adoption rates differ significantly by region:

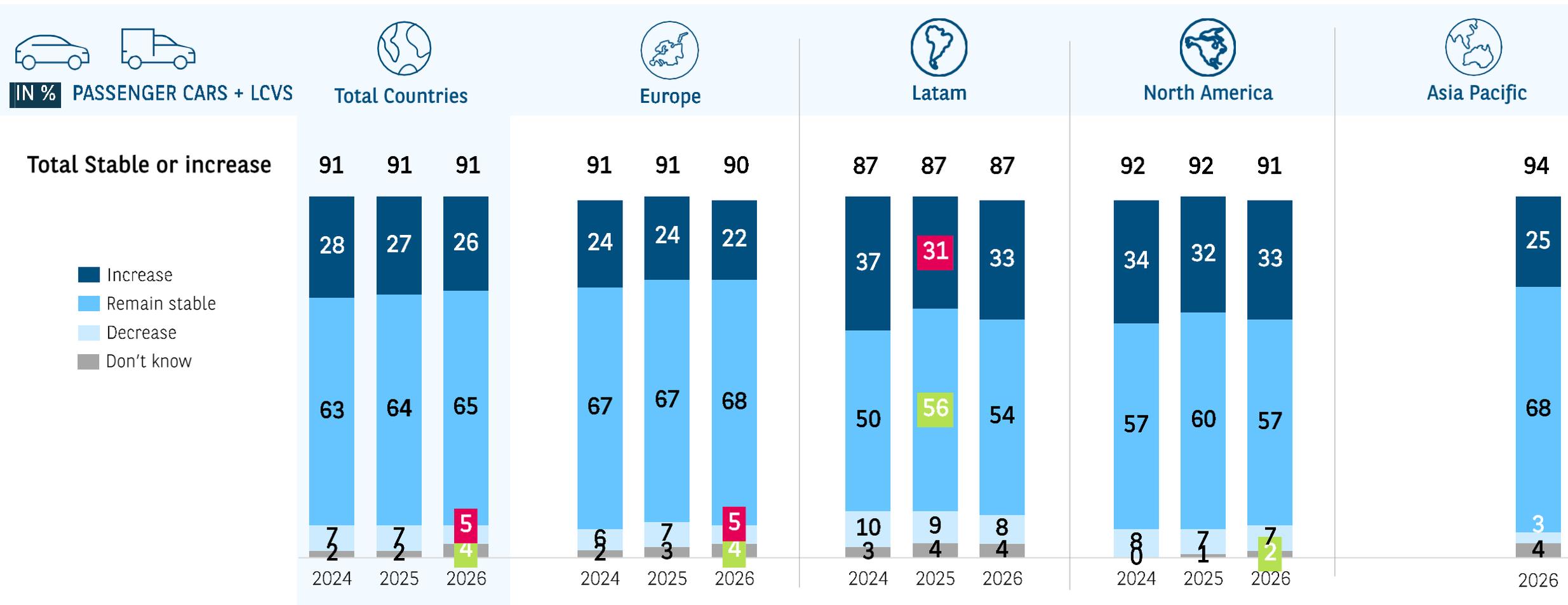
- Morocco (71%) and Greece (69%) are at the forefront, followed by Mexico (66%) and Finland (63%).
- In contrast, France lags with only 17% adoption.

In terms of vehicle types, both passenger cars and light commercial vehicles (LCVs) have seen increased second-hand integration, rising by 3 and 2 points, respectively.

FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

Overall in 2026, 91% of the companies expect their fleet to remain stable or to increase in the next 3 years.

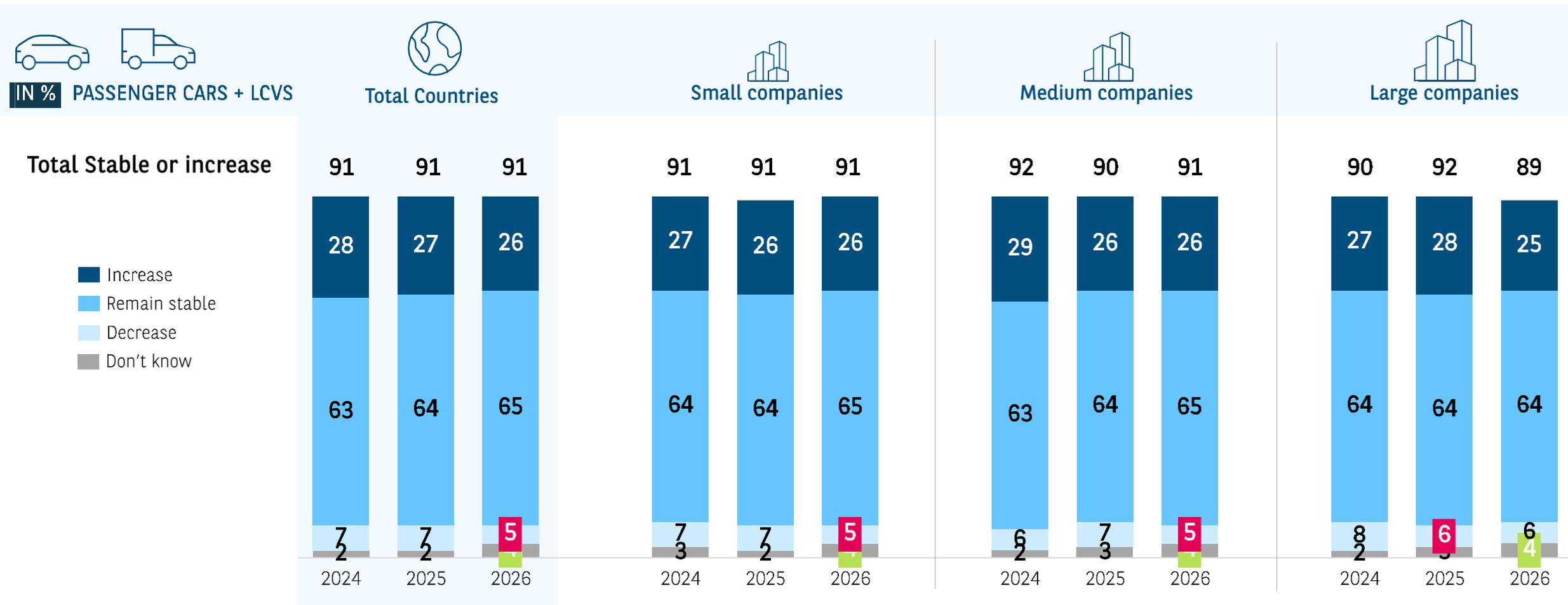


A8. In the next three years, do you think that the total number of vehicles in your company fleet will increase, decrease or remain the same?
 Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

HOW TO READ THE RESULTS ?

Overall in 2026, 91% 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%

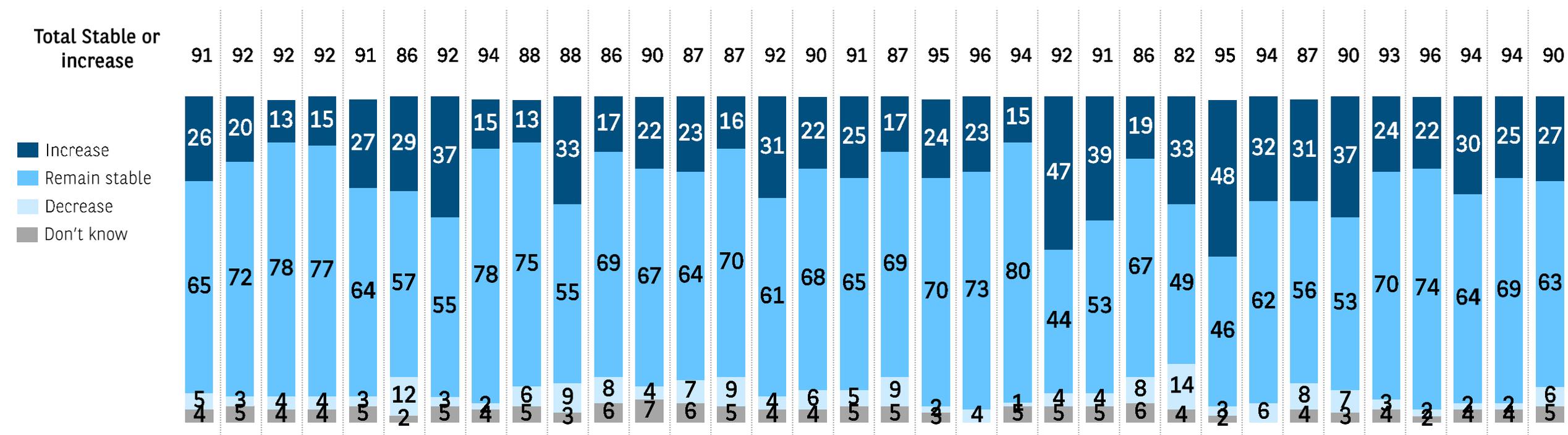
X% Significantly higher / lower vs. previous wave

HOW TO READ THE RESULTS ?

Overall in 2026, 91% of the companies expect their fleet to remain stable or to increase in the next 3 years.



IN % PC + LCVS



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?

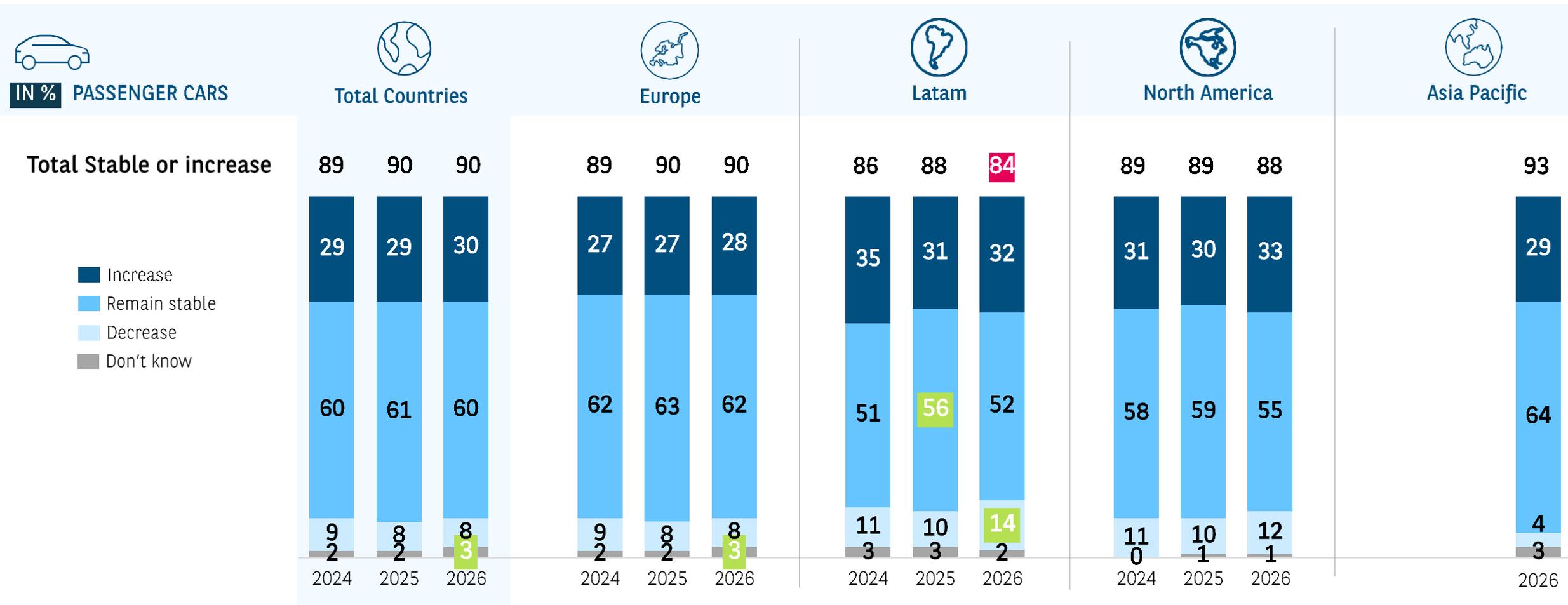
Basis: companies with corporate vehicles = 100%



PASSENGER CAR FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

Overall in 2026, 90% of the companies expect their passenger car fleet to remain stable or to increase in the next 3 years.



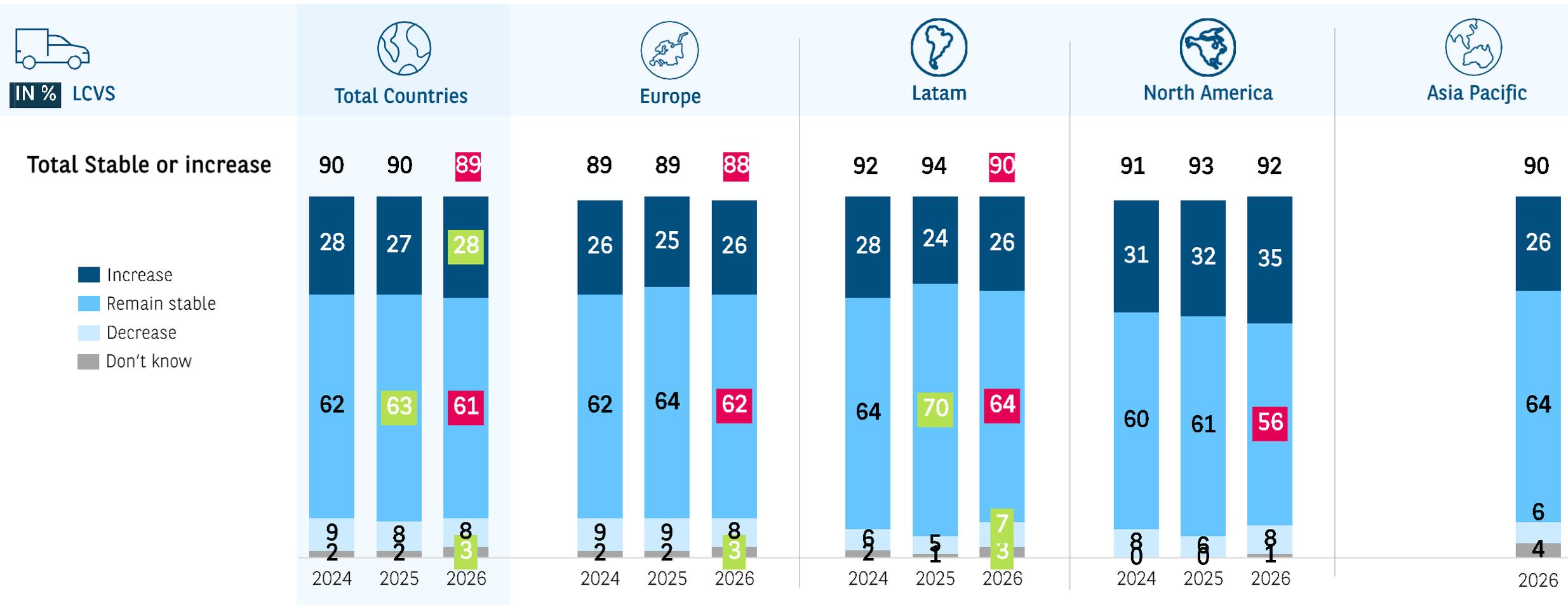
A9. In the next three years, do you think that the total number of your passenger cars will...?
 Basis: companies with passenger cars

X% Significantly higher / lower vs. previous wave

LCV FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

Overall in 2026, 89% 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

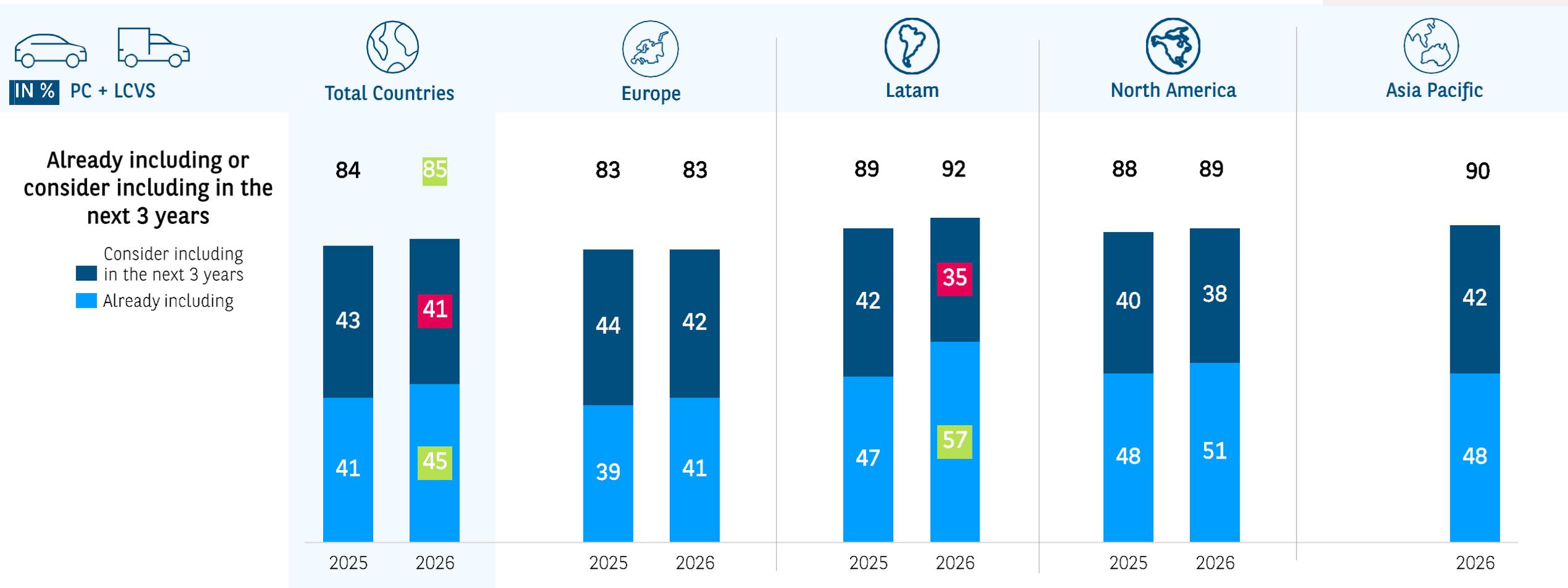
X% Significantly higher / lower vs. previous wave

USED / SECOND-HAND VEHICLES POSSESSION

HOW TO READ THE RESULTS ?

Overall in 2026, 85% of the companies are already including vehicles that were not new when acquired or are considering doing so in the next 3 years.

New question for US and CA



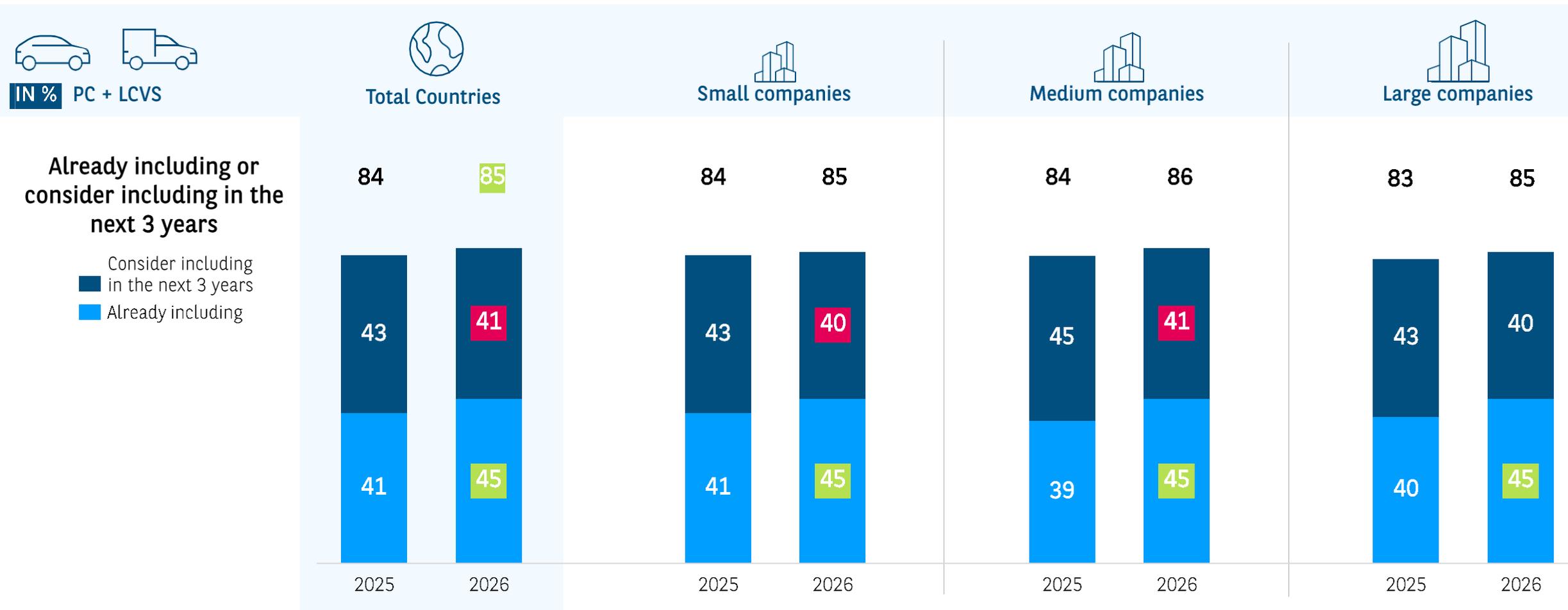
A14. Does your fleet include vehicles that were not new when you acquired them, or do you consider including some in the next 3 years?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

USED / SECOND-HAND VEHICLES POSSESSION

HOW TO READ THE RESULTS ?

Overall in 2026, 85% 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 ?

Overall in 2026, 85% of the companies are already including vehicles that were not new when acquired or are considering doing so in the next 3 years.

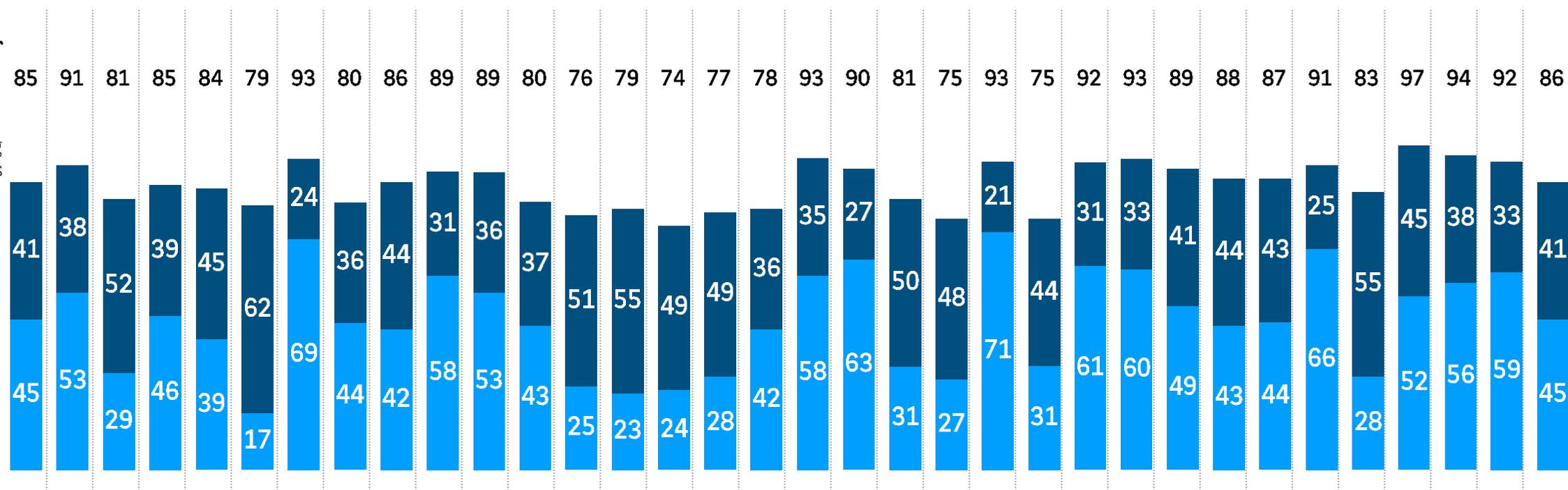


IN % PC + LCVS



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%

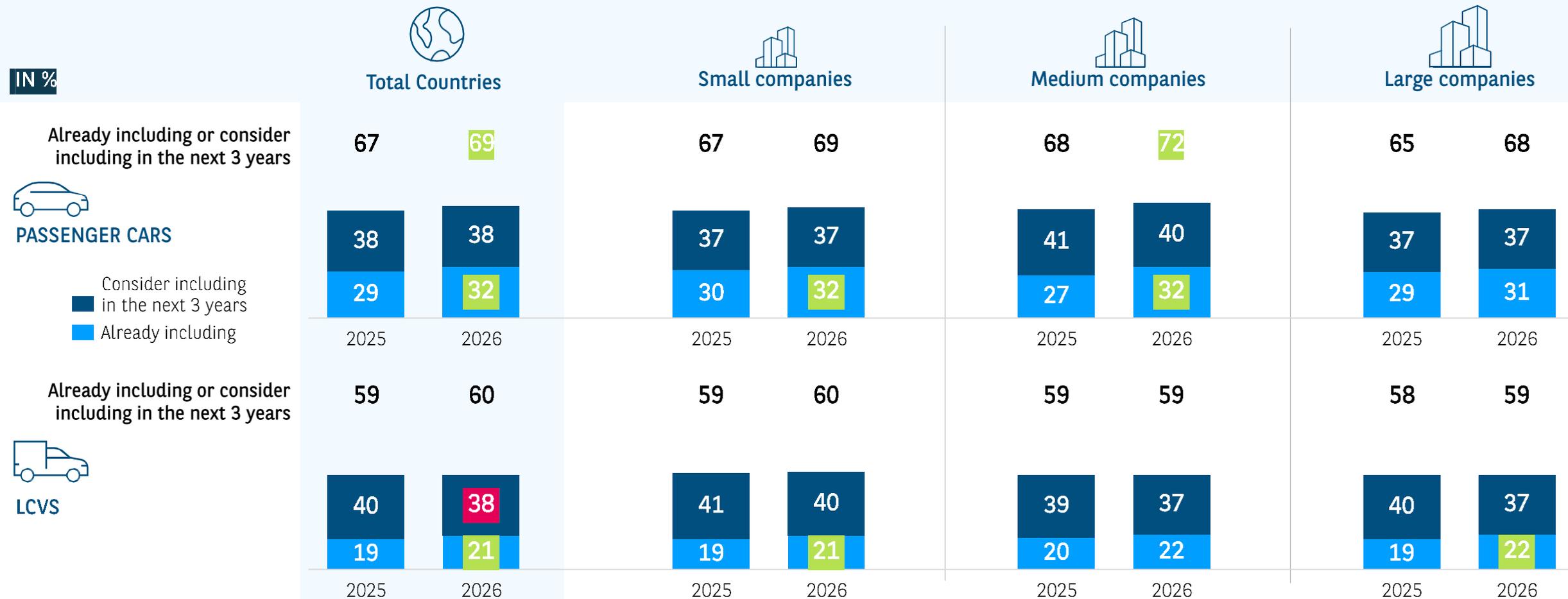


USED / SECOND-HAND VEHICLES POSSESSION

HOW TO READ THE RESULTS ?

Overall in 2026, 69% of the companies are already including or are considering including passenger cars that were not new when acquired.

60% 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 ?

Overall in 2026, 69% of the companies are already including or are considering including passenger cars that were not new when acquired.

60% of the companies are already including or are considering including LCVs that were not new when acquired.



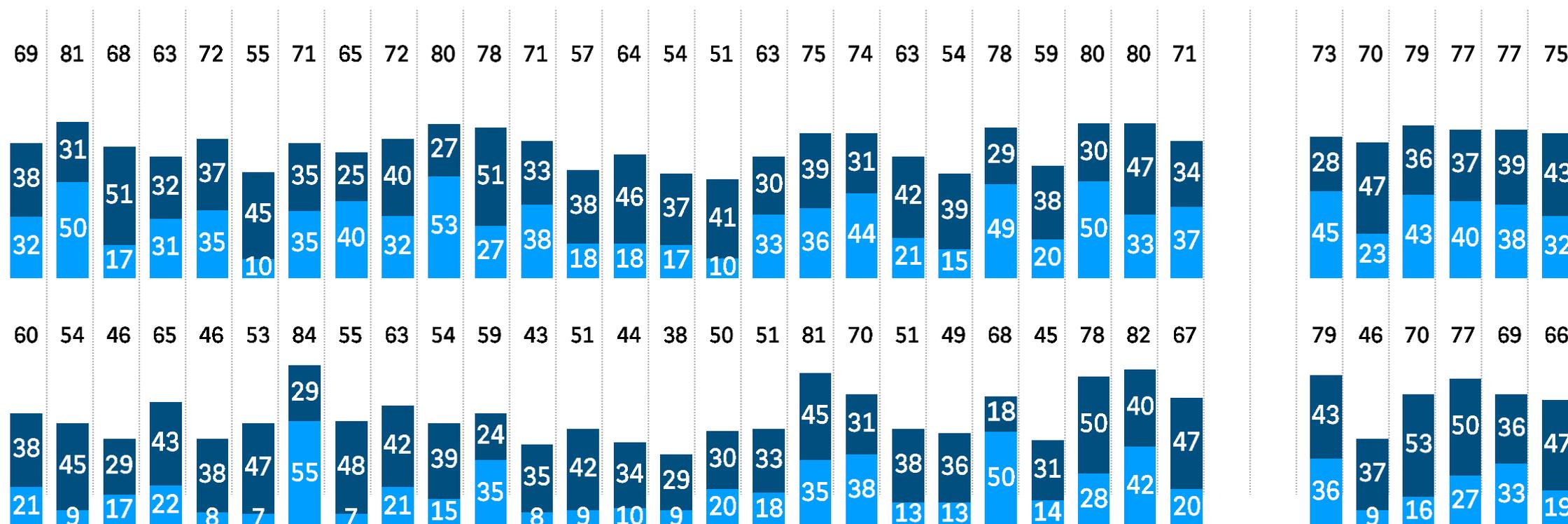
IN %

Already including or consider including in the next 3 years



PASSENGER CARS

Consider including in the next 3 years
Already including



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%

02

FINANCING METHODS

How do companies finance their fleets?



In 2026, Operational leasing is used as main financing method by 29% of companies

29% of companies use Operational leasing as main financing method for their vehicles, below Outright purchase (35%) and Financial leasing (31%). The penetration of Operational leasing is consistent across company sizes, types of vehicles and across Europe, North America and APAC regions.

- In contrast, LATAM showcases a higher adoption, with 39% of companies using Operational leasing, particularly prominent in Chile at 55%.
- Across Europe and APAC, there are disparities: from 14% in Austria and Romania to 47% in France and Spain, and from 10% in Australia and 18% in New Zealand to around 35% in India, Indonesia, and Thailand.

Operational leasing shows similar potential for financing second-hand vehicles

Among companies using or considering second-hand vehicles, 29% use Operational leasing as their main financing method, or plan to do so. This mirrors the same regional differences as for new vehicles.

The outlook for growth in full-service leasing remains steady when compared to 2025, although notable market differences persist

Overall, 37% of companies plan to introduce or expand their use of operational leasing for fleet financing, aligning with last year's trends and maintaining stability across various company sizes.

However, notable regional variations exist:

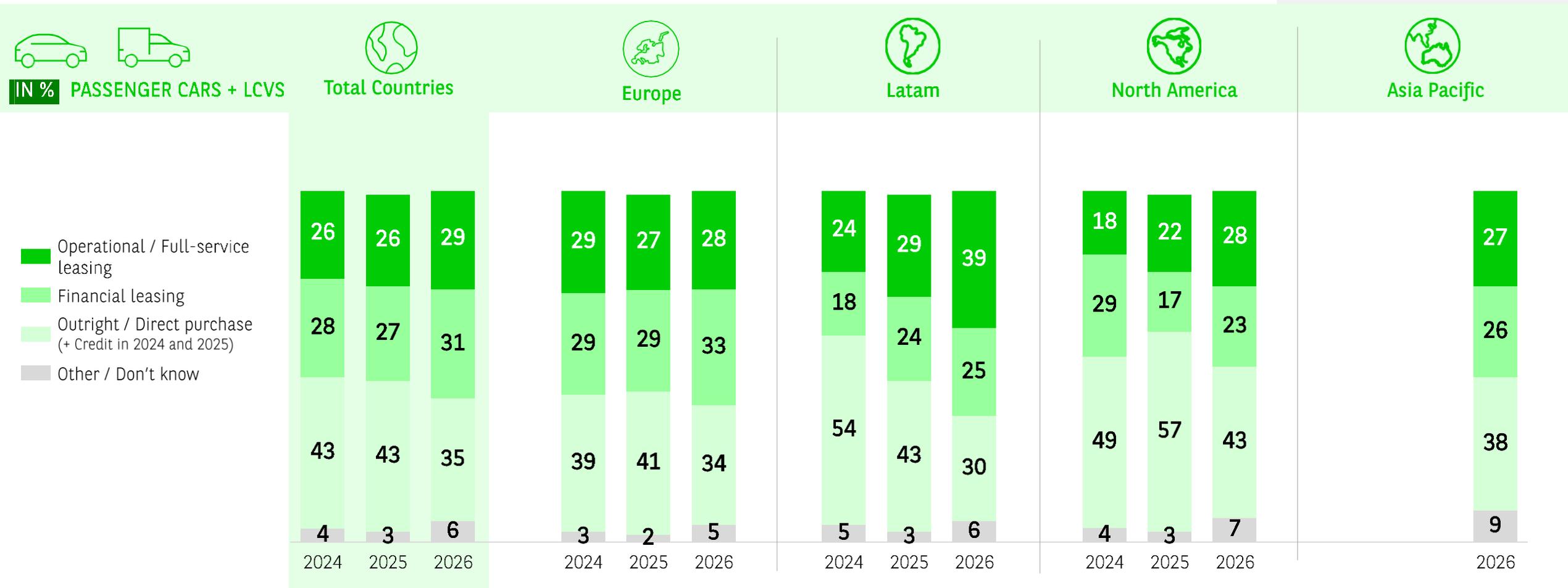
- In LATAM, interest peaks at 43%, notably in Peru where it reaches 49%.
- North America follows closely at 41%, with Mexico showing a remarkable 52% interest rate.
- APAC presents a mixed landscape at 37%, with countries like Australia (21%) and New Zealand (22%) falling behind leaders such as India (49%), Indonesia (48%), and Thailand (42%).
- Europe reflects a similar pattern at 36%, with Italy (66%) leading substantially over Switzerland (17%) and Sweden (19%).

MAIN FLEET FINANCING METHOD

HOW TO READ THE RESULTS ?

Overall in 2026, 35% of the companies are using Outright / Direct purchase as main method to finance their company vehicles.

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



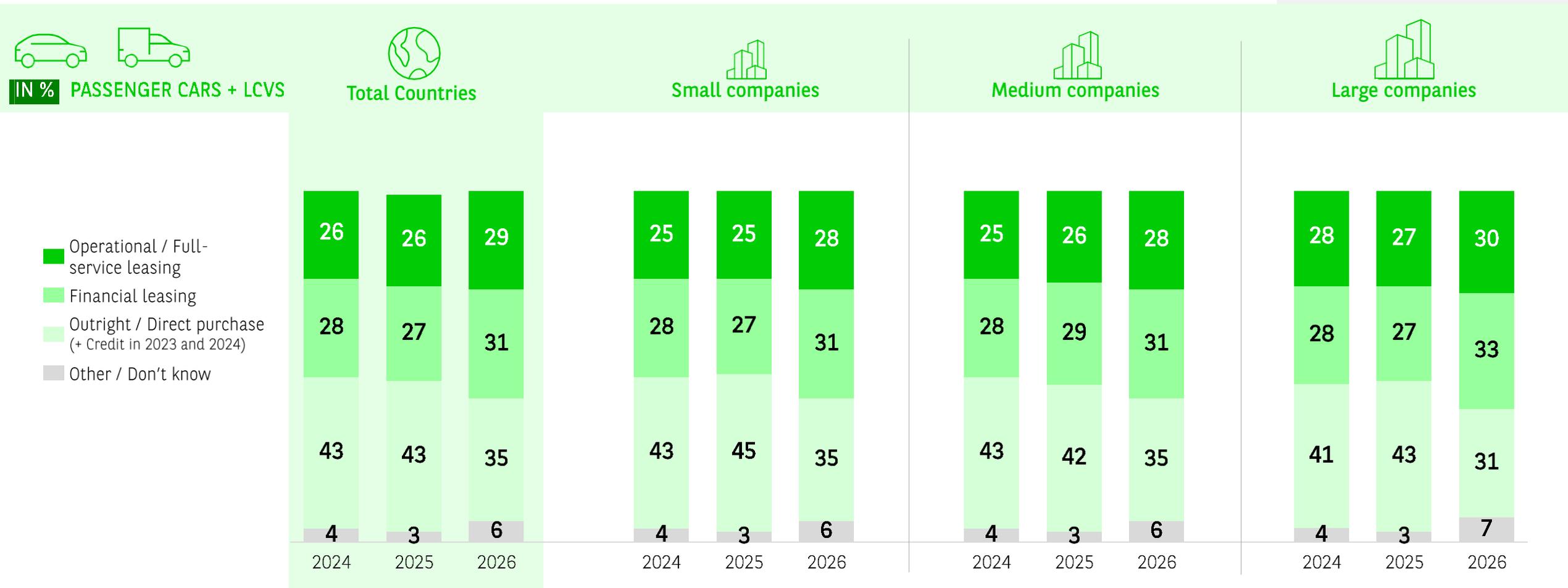
B2. What is the main method used to finance your company vehicles today?
Basis: companies with corporate vehicles = 100%

MAIN FLEET FINANCING METHOD

HOW TO READ THE RESULTS ?

Overall in 2026, 35% of the companies are using Outright / Direct purchase 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%

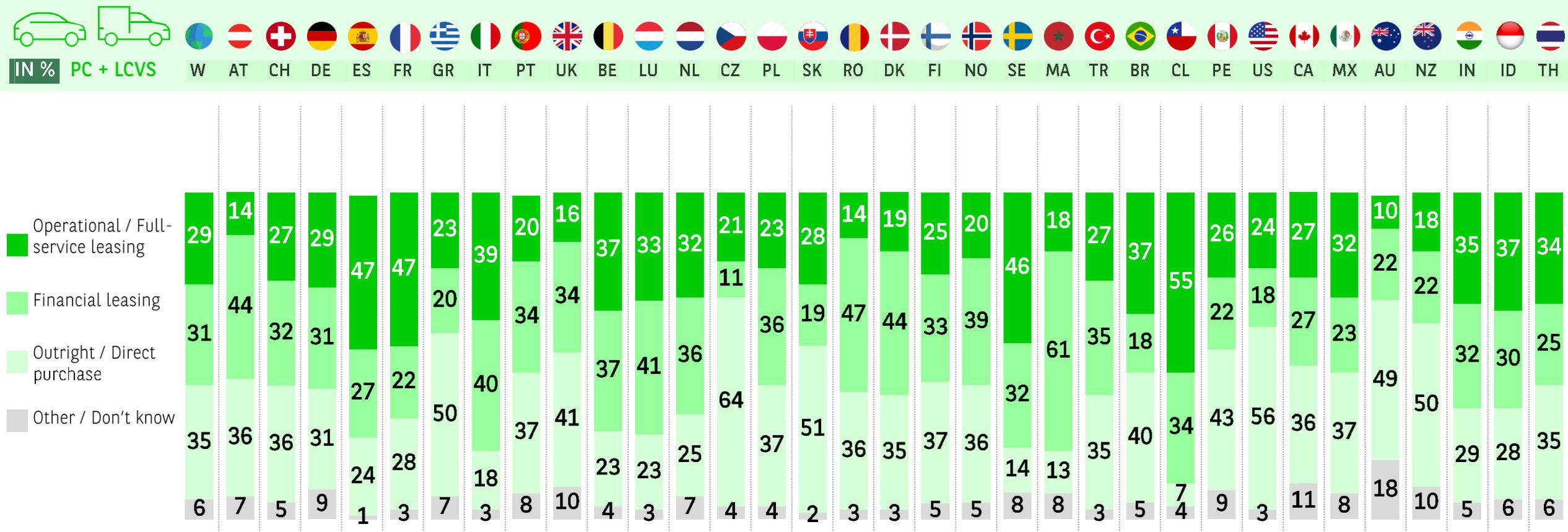
X% Significantly higher / lower vs. previous wave

MAIN FLEET FINANCING METHOD

HOW TO READ THE RESULTS ?

Overall in 2026, 35% of the companies are Outright / Direct purchase as main method to finance their company vehicles.

Item "Credit" deleted in 2026



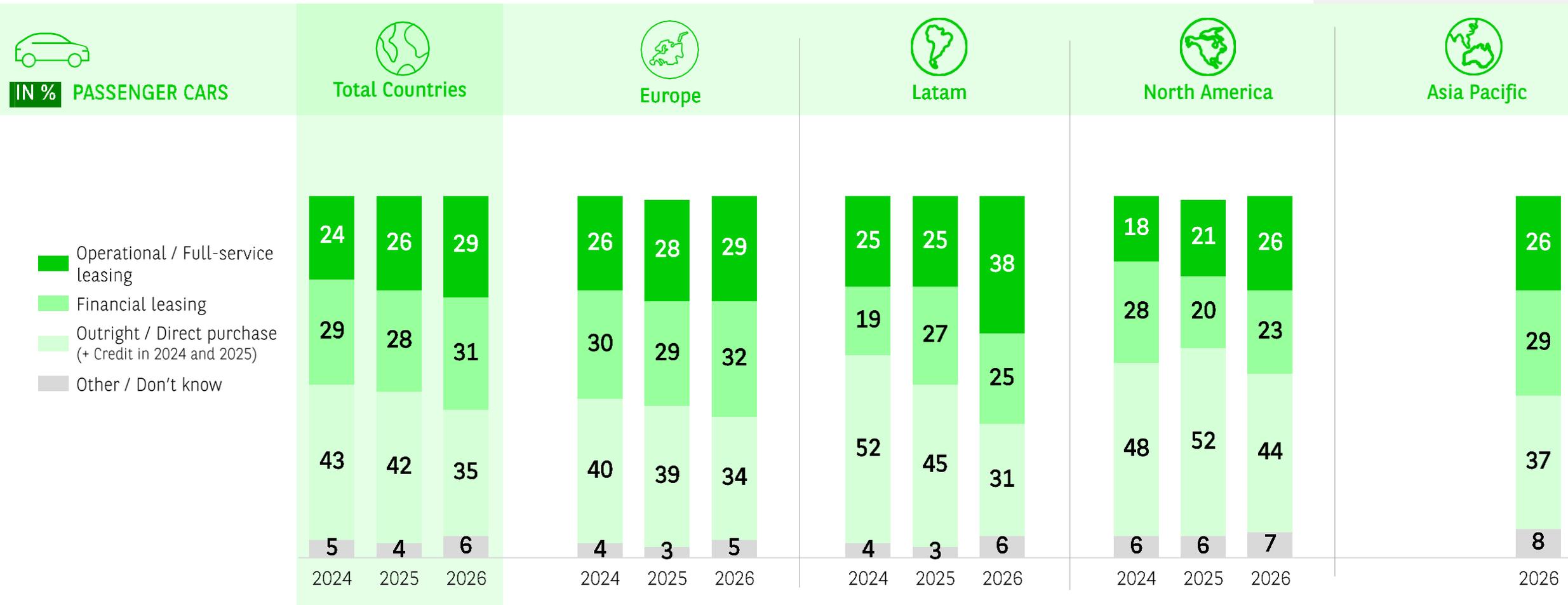
B2. What is the main method used to finance your company vehicles today?
Basis: companies with corporate vehicles = 100%

MAIN PASSENGER CARS FINANCING METHOD

HOW TO READ THE RESULTS ?

Overall in 2026, 35% of the companies are using Outright / Direct purchase as main method to finance their passenger cars.

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



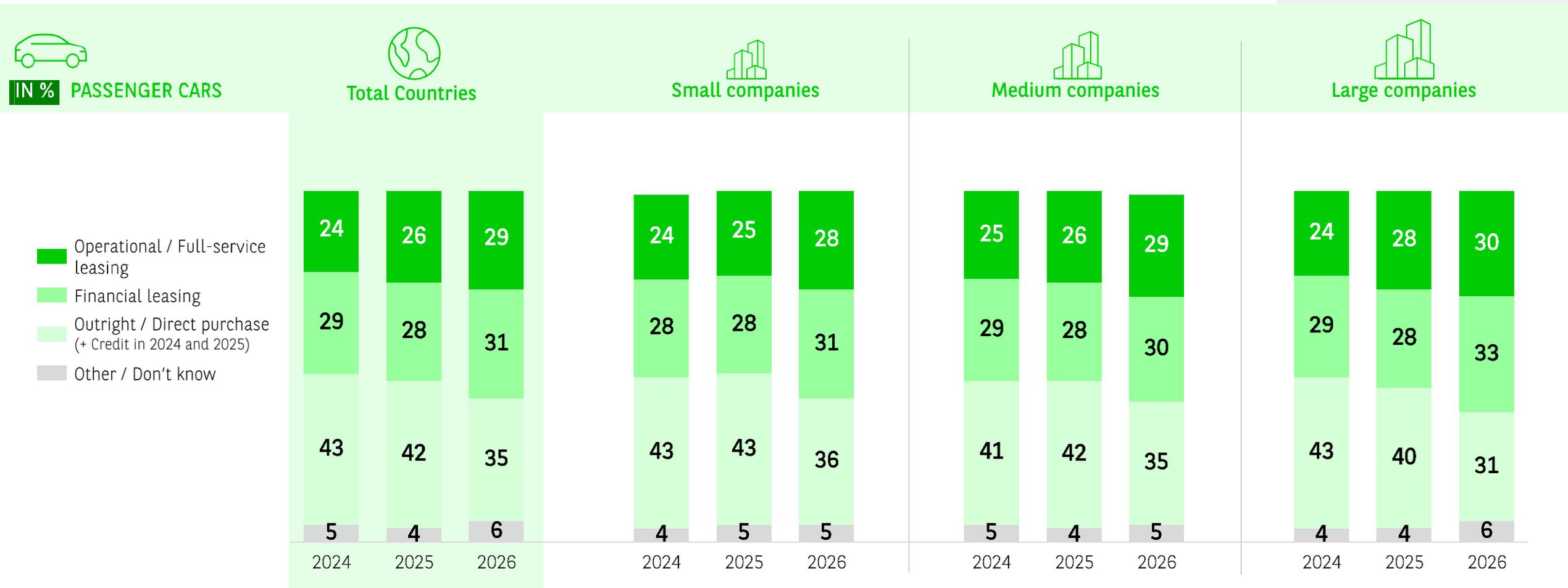
B3. And what is the main method used to finance your passenger cars today?
Basis: companies with passenger cars

MAIN PASSENGER CARS FINANCING METHOD

HOW TO READ THE RESULTS ?

Overall in 2026, 35% of the companies are using Outright / Direct purchase 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

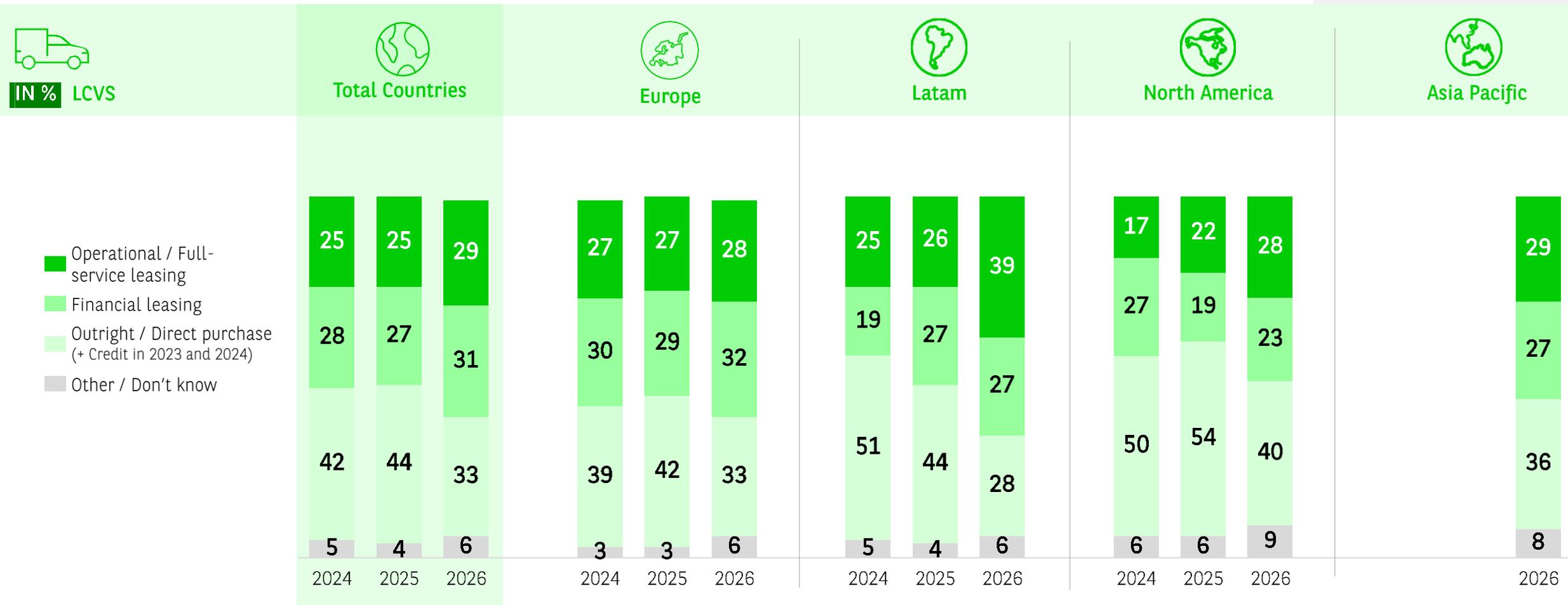
X% Significantly higher / lower vs. previous wave

MAIN LCV FINANCING METHOD

HOW TO READ THE RESULTS ?

Overall in 2026, 33% of the companies are using Outright / Direct purchase as main method to finance their LCVs.

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



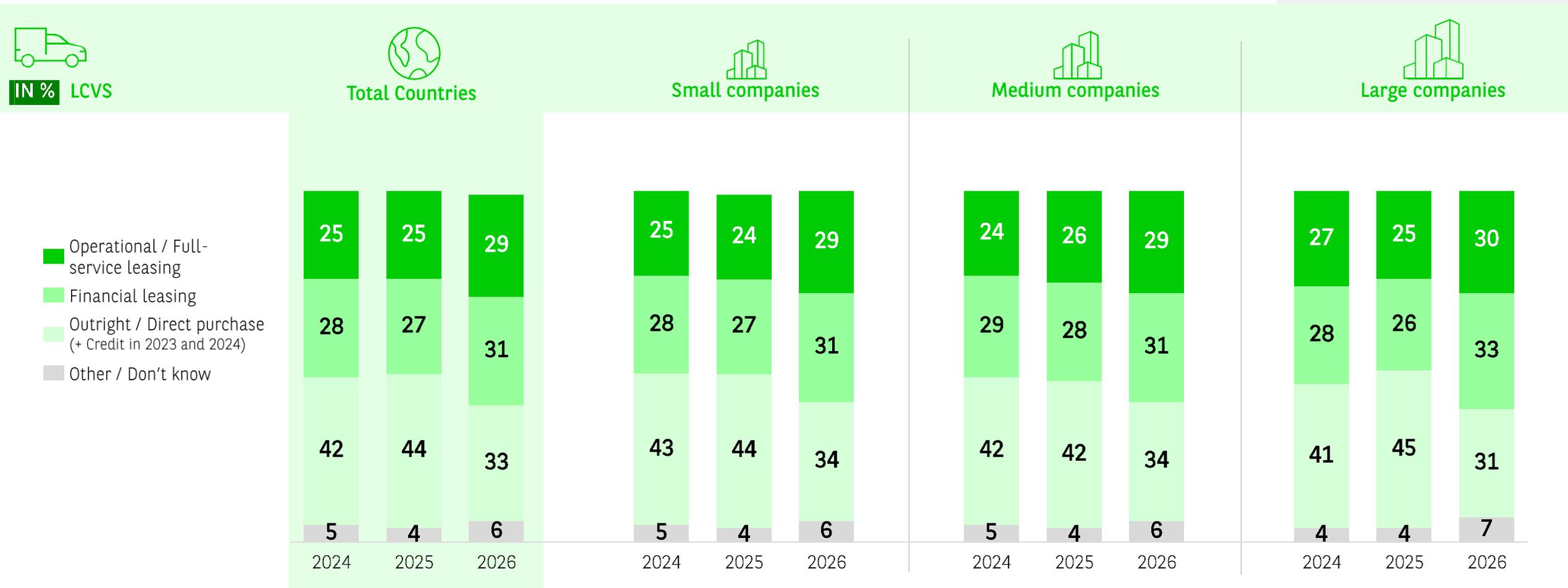
B4. And what is the main method used to finance your light commercial vehicles or vans today?
Basis: companies with LCVs

MAIN LCV FINANCING METHOD

HOW TO READ THE RESULTS ?

Overall in 2026, 33% of the companies are using Outright / Direct purchase 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

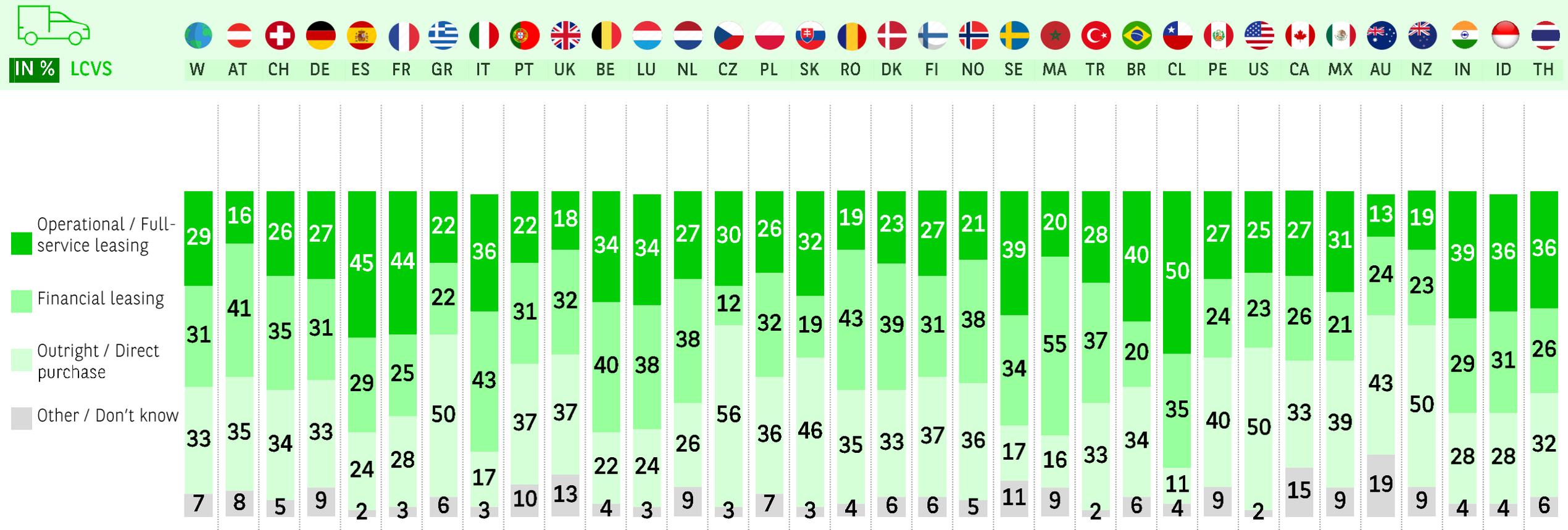
X% Significantly higher / lower vs. previous wave

MAIN LCV FINANCING METHOD

HOW TO READ THE RESULTS ?

Overall in 2026, 29% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their LCVs.

Item "Credit" deleted in 2026



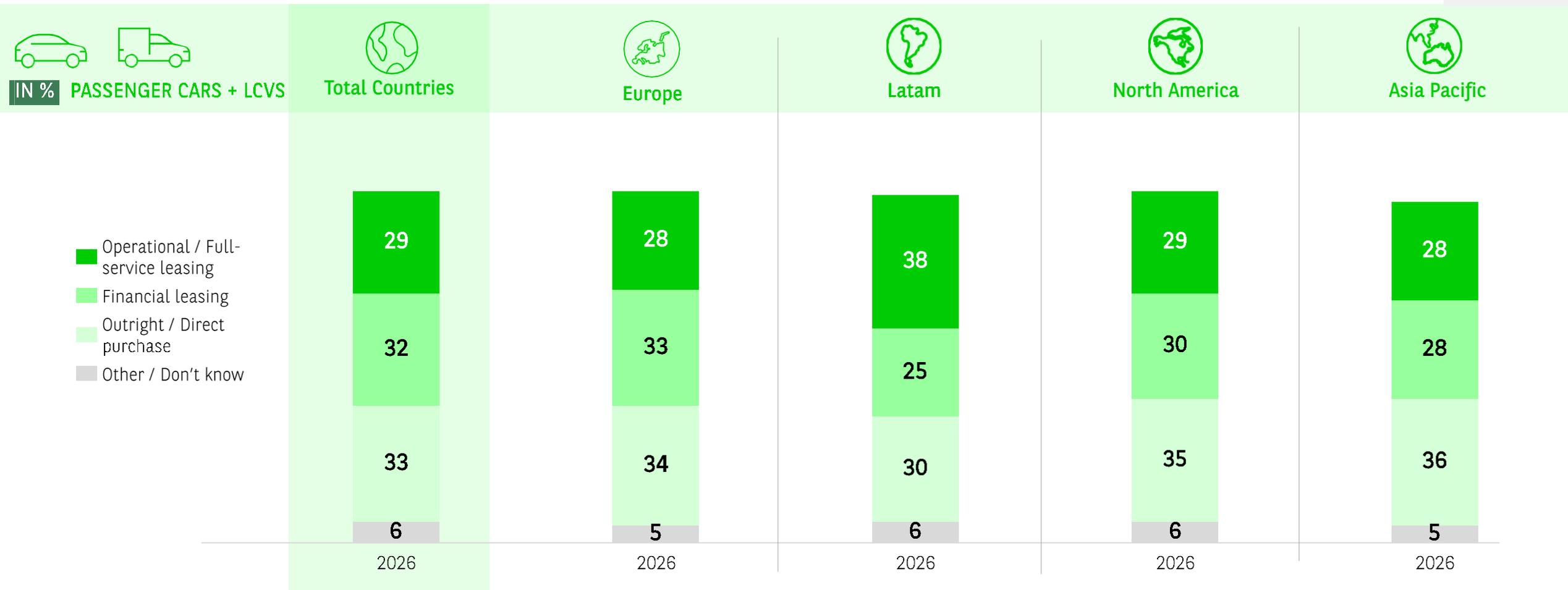
B4. And what is the main method used to finance your light commercial vehicles or vans today?
Basis: companies with LCVs

MAIN FLEET FINANCING METHOD FOR SECOND-HAND VEHICLES

HOW TO READ THE RESULTS ?

Overall in 2026, 33% of the companies with second-hand vehicles are (planning) using Outright / Direct purchase 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?

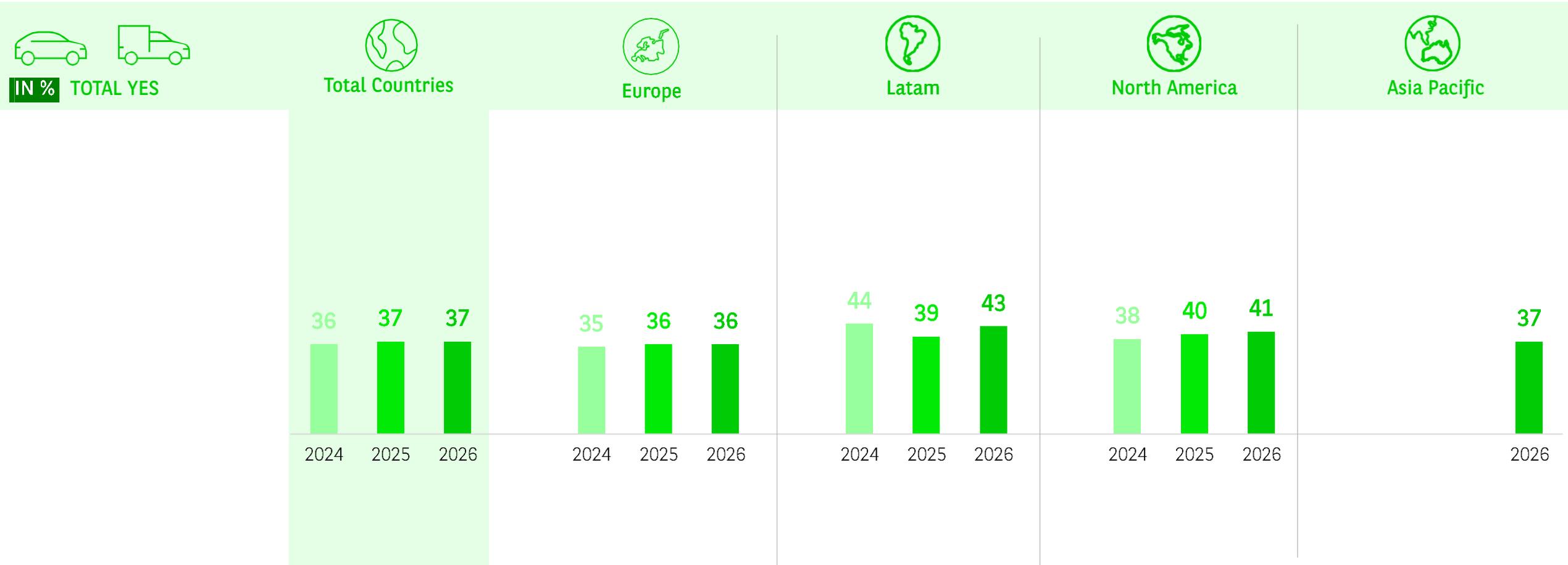
Basis: companies with corporate second-hand vehicles



INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATIONAL LEASING

HOW TO READ THE RESULTS ?

Overall in 2026, 37% 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.



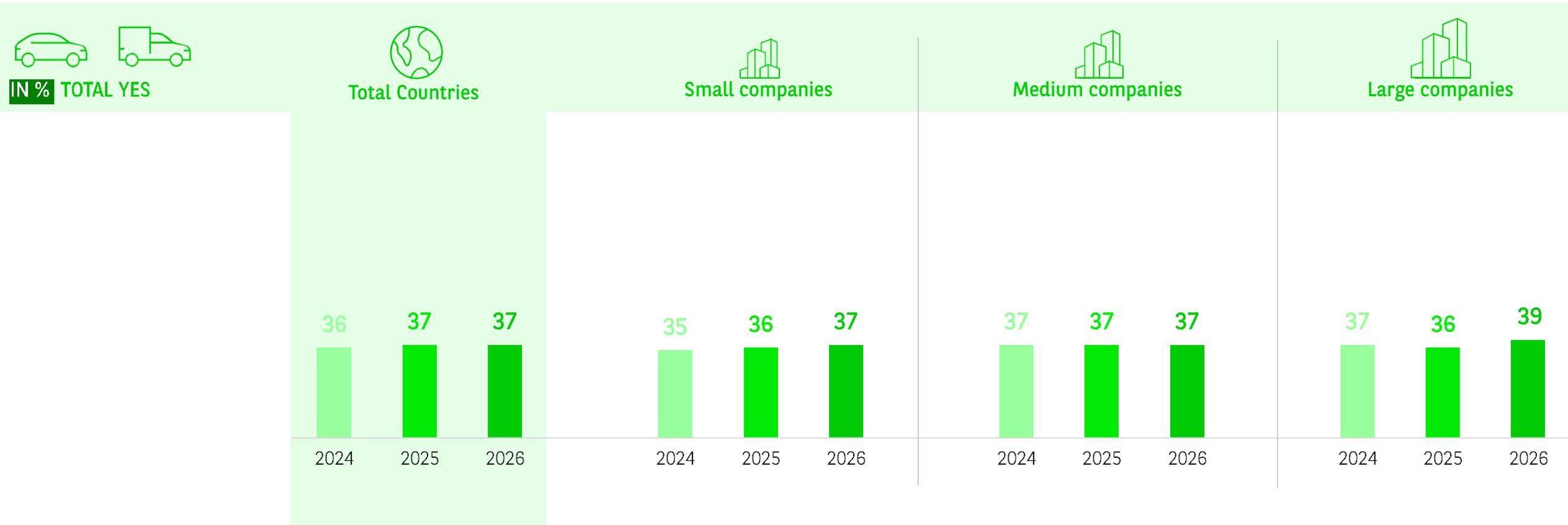
B8bis. In the next three years do you intend to either introduce or increase the use of Operational Leasing / Full-Service Leasing to finance your corporate fleet?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATIONAL LEASING

HOW TO READ THE RESULTS ?

Overall in 2026, 37% 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.



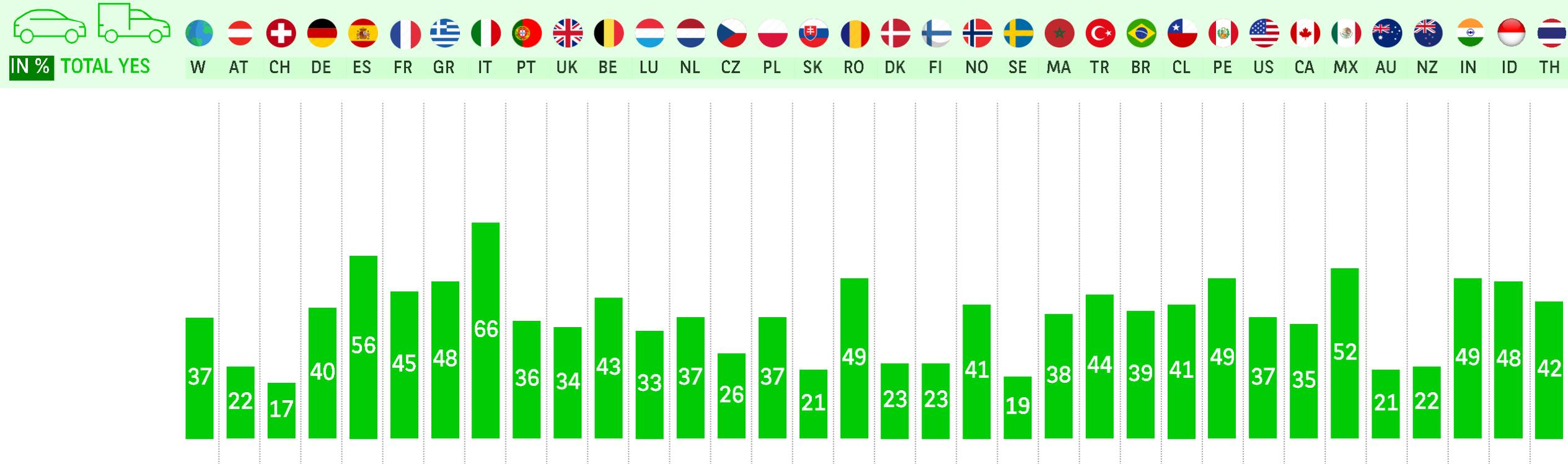
B8bis. In the next three years do you intend to either introduce or increase the use of Operational Leasing / Full-Service Leasing to finance your corporate fleet?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATIONAL LEASING

HOW TO READ THE RESULTS ?

Overall in 2026, 37% 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%

03

ENERGY MIX

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



Fleet electrification in 2026: building on the momentum of the past two years

Overall, 46% of companies have implemented at least one type of electrified technology (hybrid (HEV), plug-in hybrid (PHEV) or battery electric (BEV)) for passenger cars, while an additional 20% are considering the idea. These adoption and consideration rates remain steady across different company sizes.

Regional disparities in fleet electrification remain significant

Adoption remains heterogeneous across markets:

- Europe leads the way overall, with 57% of companies already using electrified technologies — a stable trend from last year. Notably, France, the UK, the Netherlands, Norway, and Sweden exhibit high adoption rates between 76% and 84%. In contrast, Eastern European nations like Slovakia, Romania, and the Czech Republic lag behind, showing adoption rates of 24% to 33%.
- North America follows with a 50% adoption rate, led by the US at 58%.
- In APAC, there's a stark contrast between the more advanced markets of New Zealand (56%) and Australia (52%) and the less mature markets of India (17%), Indonesia (16%), and Thailand (16%).
- LATAM markets are the least mature (14%).

The anticipation of restrictive policies, access to low emission zones and tax incentives are increasingly compelling factors in the adoption of electrified technologies in Europe

Across all regions, environmental benefits and fuel cost savings are the two leading reasons claimed by 38% and 35% of respondents, respectively, for the shift to electrified vehicles..

- In Europe, awareness of forthcoming regulatory changes and tax incentives, as well as the ability to access low-emission zones, are becoming increasingly important motivators for passenger car fleets. This aligns with the current European regulatory framework.
- In LATAM, North America and APAC, achieving a total cost of ownership (TCO) comparable to that of internal combustion engine (ICE) vehicles is also a key driver, as claimed by 31% to 35% of companies.

The high purchase price and limited model range are increasingly significant barriers to electrification

Overall, the main constraint to broader EV adoption remains the lack of charging points, be it on streets, at home, or in corporate settings, claimed by 68% for passenger cars and 67% for light commercial vehicles (LCVs). It is rather consistent across regions.

The following have also become more of a concern:

- The higher purchase price (36% for passenger cars and 35% for LCV, a 2-point increase for both).
- The limited range of models (30% for passenger cars and 29% for LCV, a 2-point increase for both).

On the other hand, issues like driving range limitations and reluctance to transition to EVs appear to be less of a concern in Latam and North America.

Charging at company premises emerges as the primary policy

In 2026, charging at the company premises is current or future charging policy for 85% of the companies. Among them, 56% have already installed charging stations or plan to within the next year.

Public charging follows as the second most popular option, with 66% of companies considering this approach. Among these, 63% reimburse energy costs through expense claims, while others provide energy cards to drivers.

Home charging remains the least common practice, adopted by only 21% of companies. Most of them (84%) offer at least one charging solution to company car drivers, such as Wallboxes (56%) and reinforced sockets (40%). Financial support for home charging is prevalent, with 95% offering assistance: 48% partial and 31% full coverage. Additionally, 16% provide lump-sum payments. When financial support is provided, 32% fully reimburse energy costs, and 31% provide partial reimbursement.

A divided strategy regarding the 2030 regulations for BEVs

If regulations required to switch fleet of passenger company cars exclusively to BEVs by 2030 at the latest, 48% of the European companies would take all necessary measures to comply with, while 46% of the companies would transfer the choice of mobility means to your employees by offering them a mobility budget instead of a company car. Only 6% of the companies would remove all mobility benefits from your compensation package, unless they are mandatory by law.

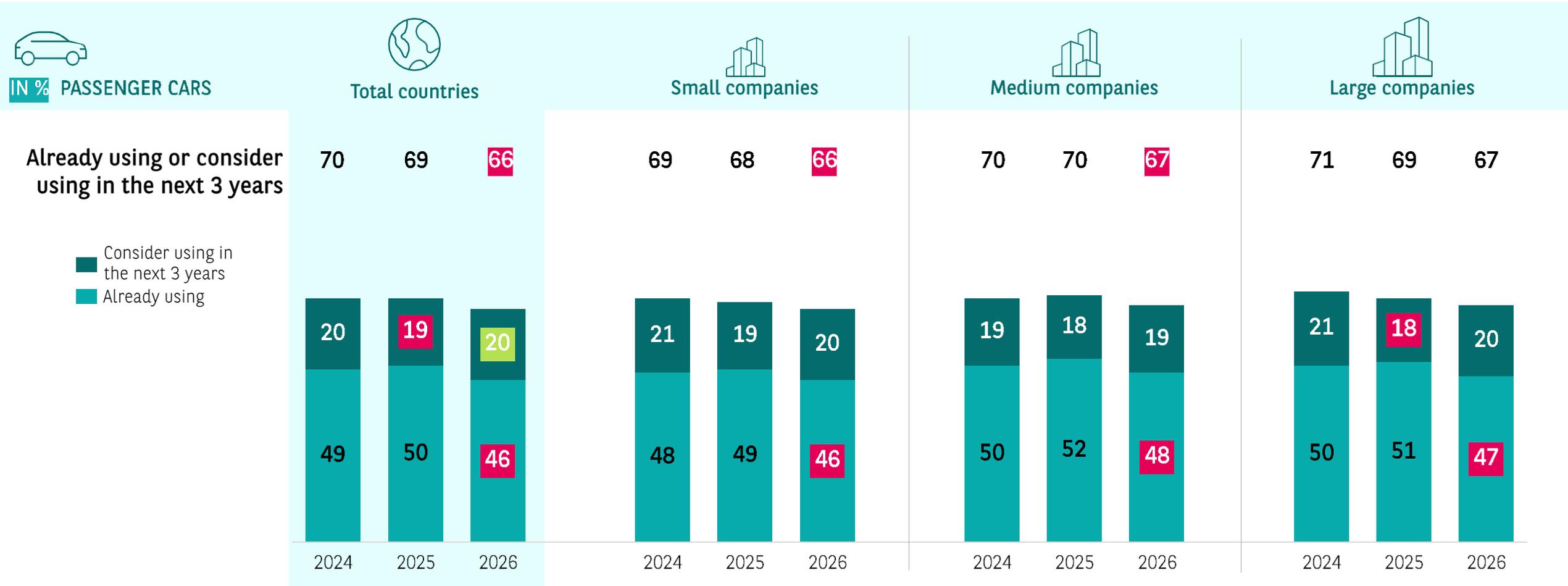
Leasing providers significantly impact energy mix decisions

Overall, 82% of 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 ?

Overall in 2026, 66% 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

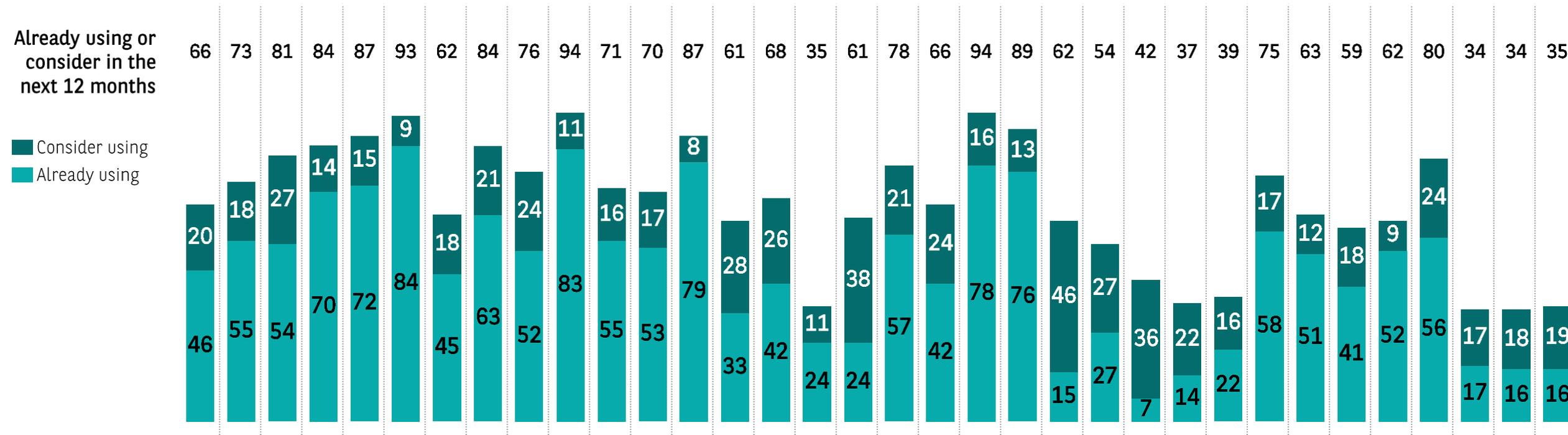
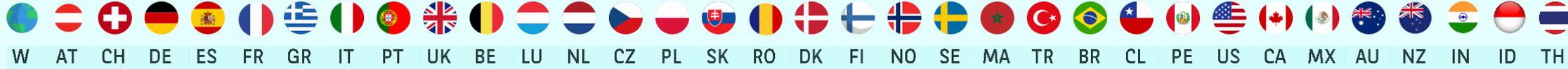
ELECTRIFIED VEHICLES TECHNOLOGIES USAGE AT LEAST ONE TECHNOLOGY AMONG BEV, PHEV, HEV

HOW TO READ THE RESULTS ?

Overall in 2026, 66% 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.



IN % PC



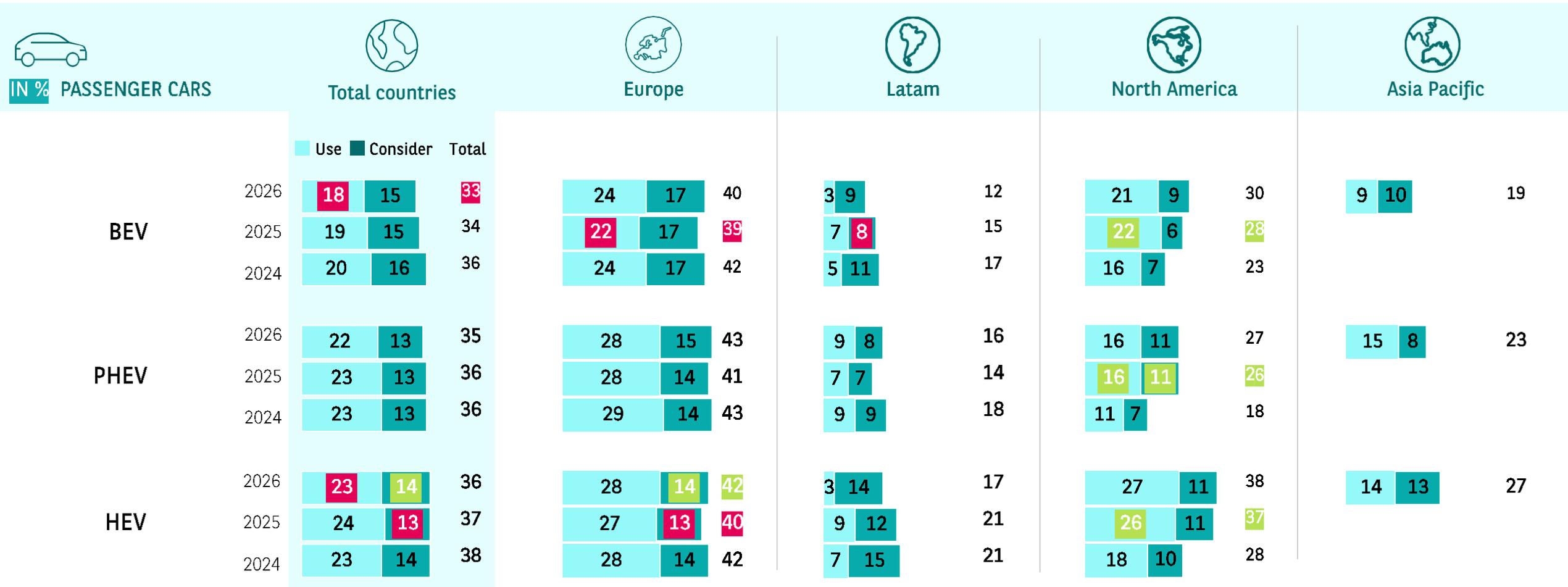
E28. Amongst the following electrified vehicles technologies, which ones do you currently use...? /
E28bis. Amongst the following electrified vehicles technologies, which ones are you considering using...?
Basis: companies with passenger cars

ELECTRIFIED VEHICLES TECHNOLOGIES USAGE

DETAIL PER TECHNOLOGY

HOW TO READ THE RESULTS ?

Overall in 2026, 33% 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

REASONS FOR IMPLEMENTING ELECTRIFIED VEHICLES TECHNOLOGIES FOR PASSENGER CARS

HOW TO READ THE RESULTS ?

Overall in 2026, 38% of the companies with passenger cars are already using electrified vehicles technologies or are considering it Because of their lower environmental impact.



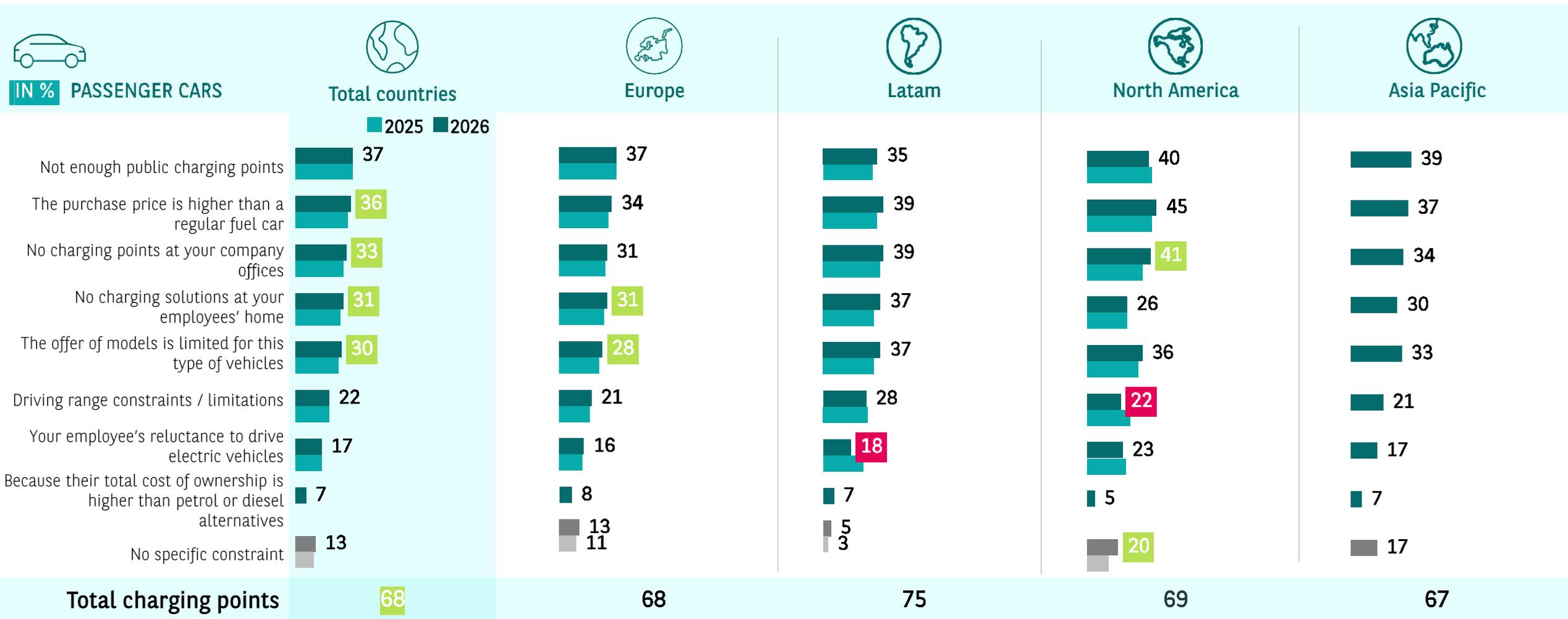
E28A. Why have you already implemented or why do you consider implementing these electrified vehicles technologies?
Basis: companies that are already using or considering using electrified vehicles technologies for passenger cars

X% Significantly higher / lower vs. previous wave

CONSTRAINTS FOR USING ELECTRIC PASSENGER CARS

HOW TO READ THE RESULTS ?

Overall in 2026, 37% of the companies with passenger cars declare that the main constraint for using electric passenger cars is: Not enough public charging points. And 68% of the companies mention at least one reason related to charging points.



E28B_2. What are the constraints of using electric passenger cars (Battery Electric Vehicles)?
Basis: companies with PCs and aware of EV technology

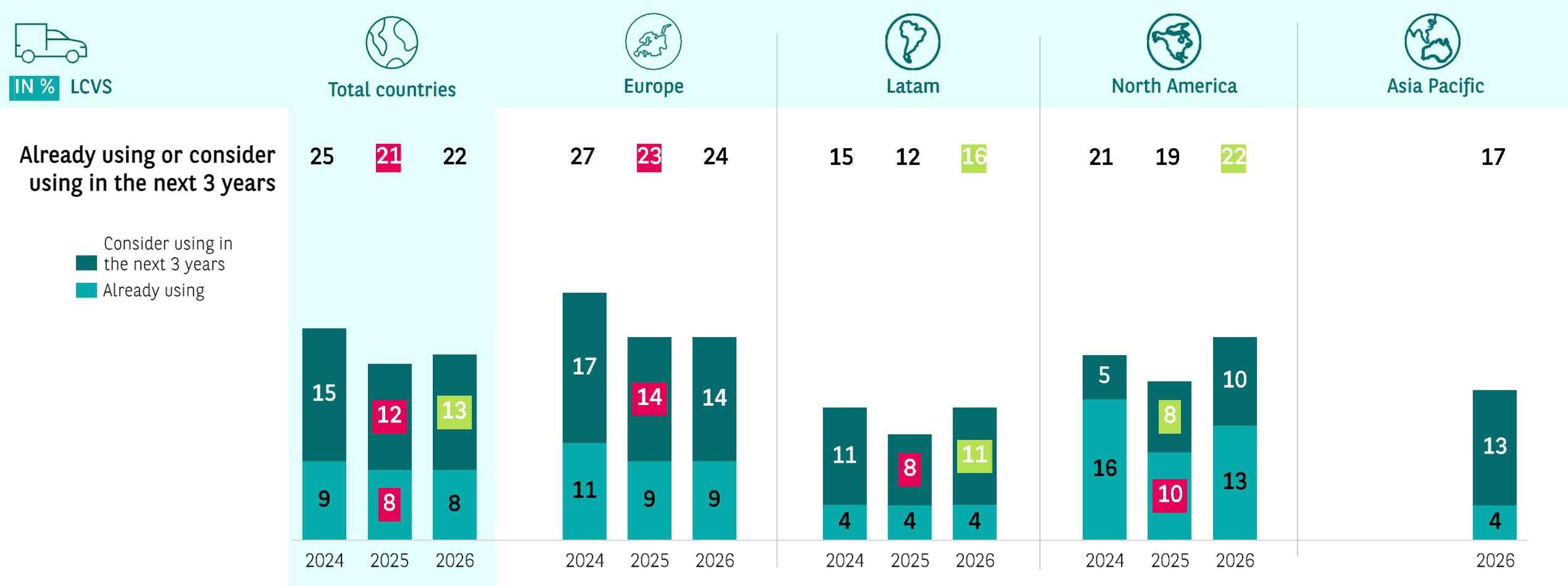
X% Significantly higher / lower vs. previous wave

ELECTRIFIED VEHICLES TECHNOLOGIES USAGE

FOCUS ON BEV

HOW TO READ THE RESULTS ?

Overall in 2026, 22% 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

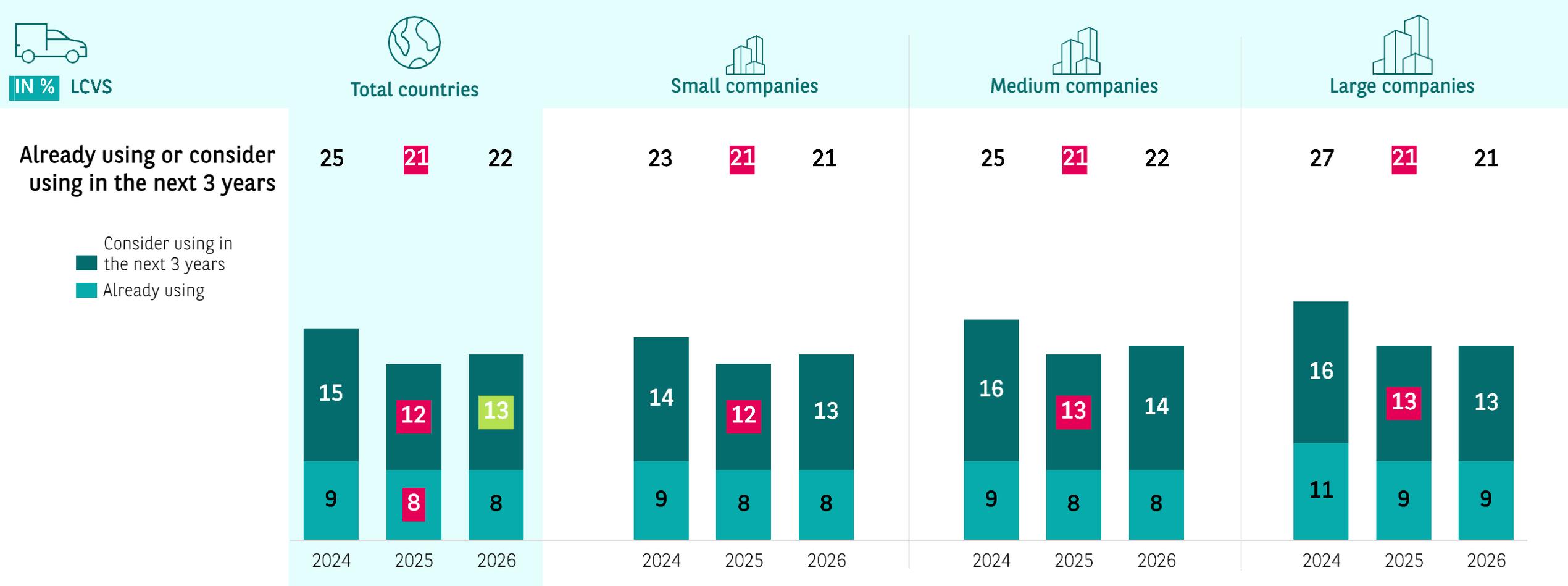
X% Significantly higher / lower vs. previous wave

ELECTRIFIED VEHICLES TECHNOLOGIES USAGE

FOCUS ON BEV

HOW TO READ THE RESULTS ?

Overall in 2026, 22% 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

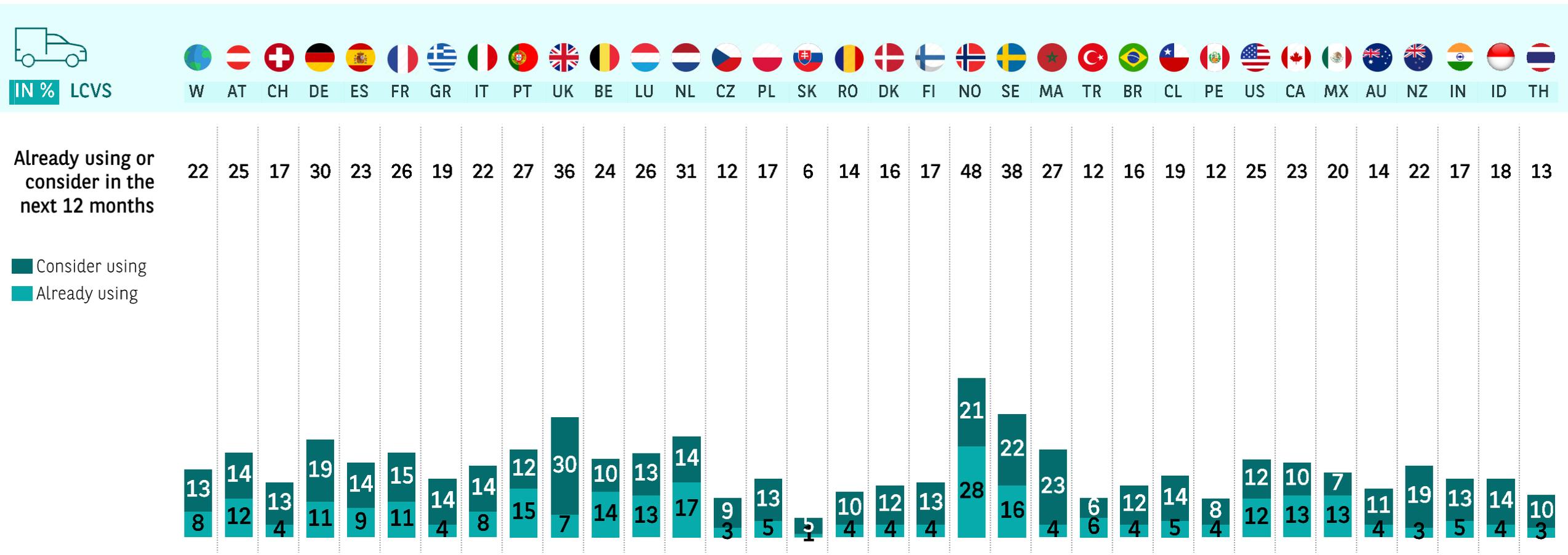
X% Significantly higher / lower vs. previous wave

ELECTRIFIED VEHICLES TECHNOLOGIES USAGE

FOCUS ON BEV

HOW TO READ THE RESULTS ?

Overall in 2026, 22% of the companies with LCVs are already using BEV or are considering using it in the next three years.

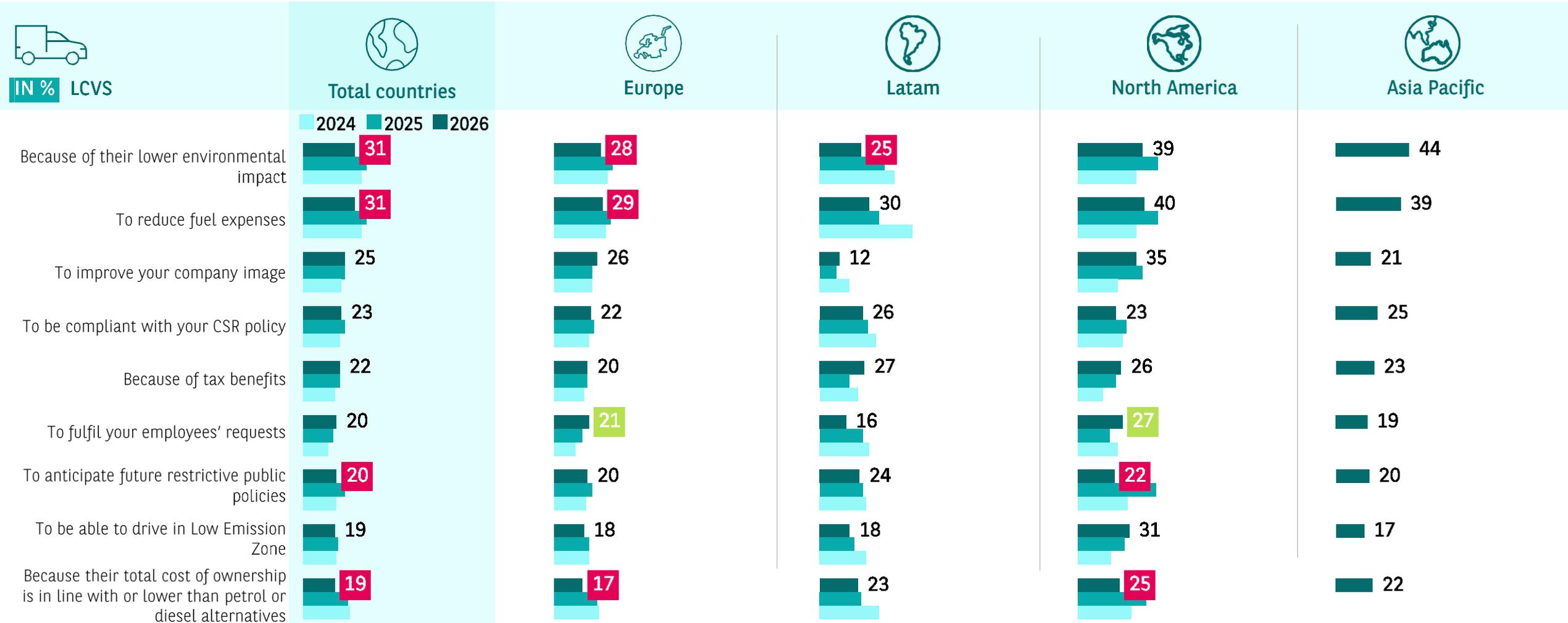


E28. Amongst the following electrified vehicles technologies, which ones do you currently use...?
 E28bis. Amongst the following electrified vehicles technologies, which ones are you considering using...?
 Basis: companies with LCVs

REASONS FOR IMPLEMENTING ELECTRIFIED VEHICLES TECHNOLOGIES FOR LCVS

HOW TO READ THE RESULTS ?

Overall in 2026, 31% of the companies with LCVs are already using electrified vehicles technologies or are considering it Because of their lower environmental impact and To reduce fuel expenses.



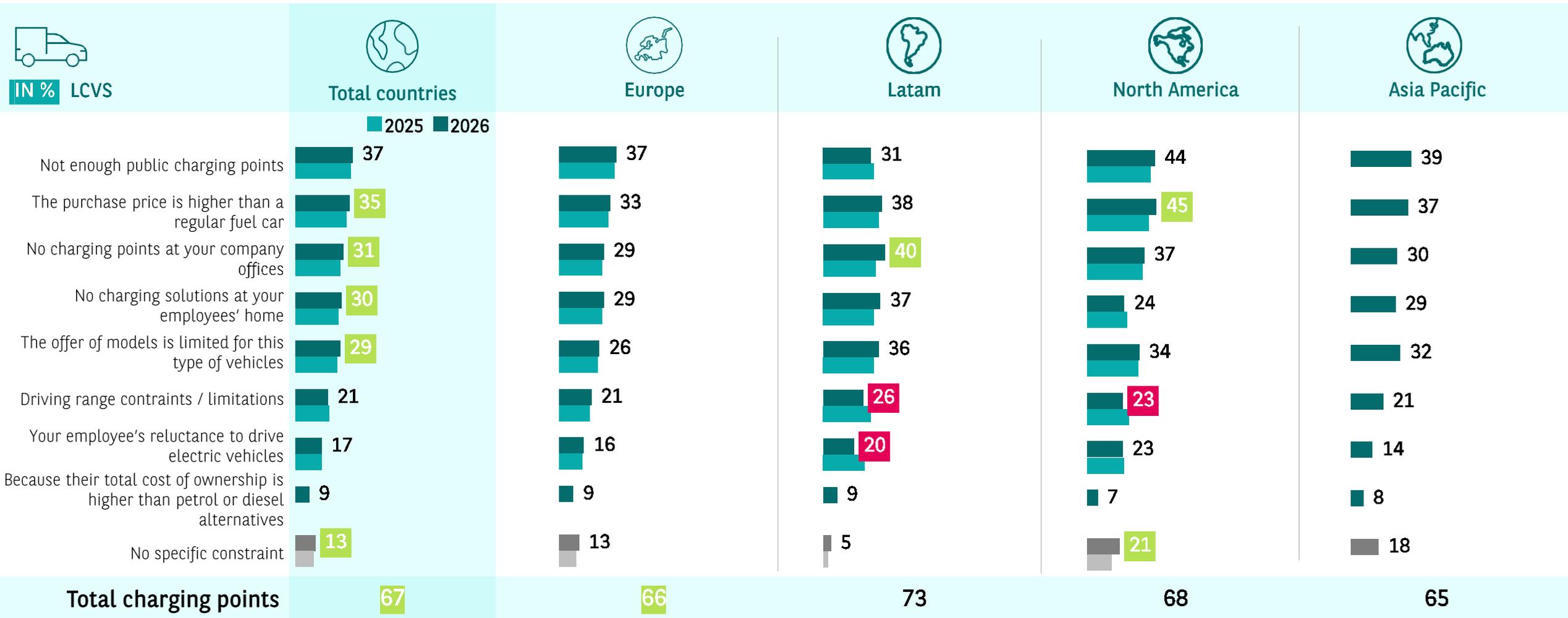
E28A. Why have you already implemented or why do you consider implementing these electrified vehicles technologies?
Basis: companies that are already using or considering using electrified vehicles technologies for LCVs

X% Significantly higher / lower vs. previous wave

CONSTRAINTS FOR USING ELECTRIC LIGHT COMMERCIAL VEHICLES

HOW TO READ THE RESULTS ?

Overall in 2026, 37% of the companies with LCVs declare that the main constraint for using electric LCVs is: Not enough public charging points. And 67% of the companies mention at least one reason related to charging points.



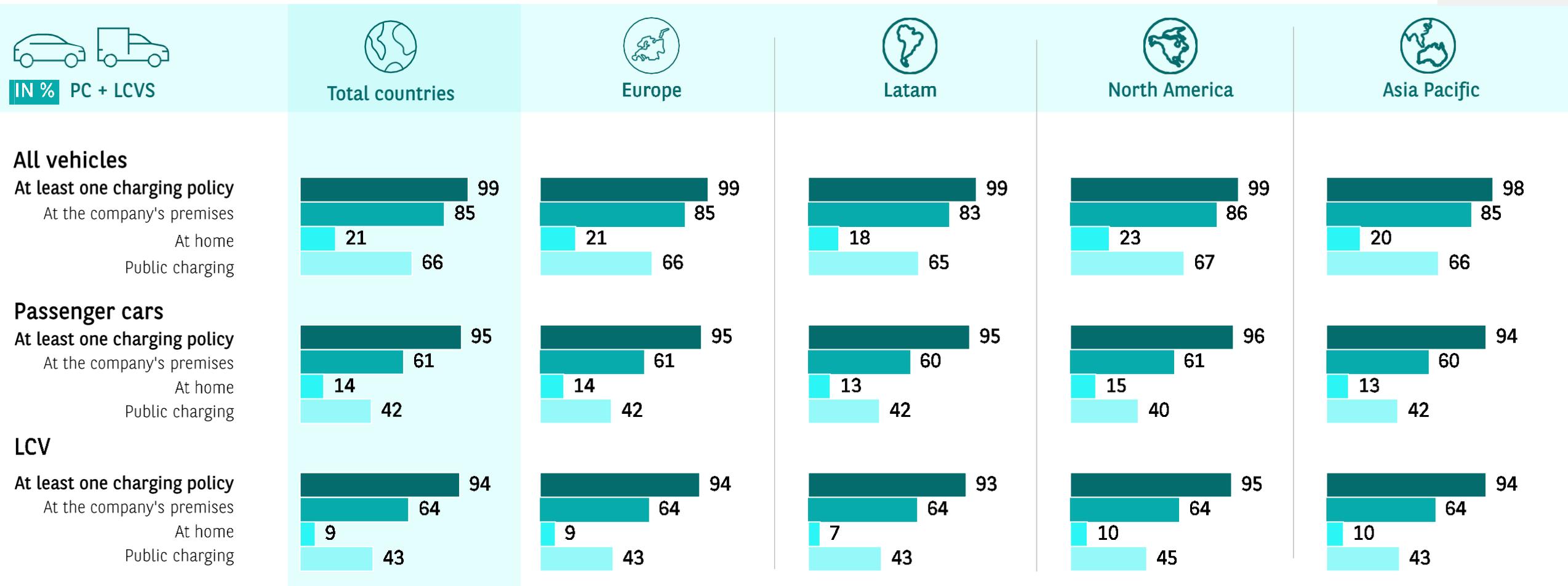
E28B_2. What are the constraints of using electric light commercial vehicles (Battery Electric Vehicles)?
Basis: companies with LCVs and aware of EV technology

X% Significantly higher / lower vs. previous wave

HOW TO READ THE RESULTS ?

Overall, 99% of the companies have or will have at least one charging policy in the future for all vehicles.

New question



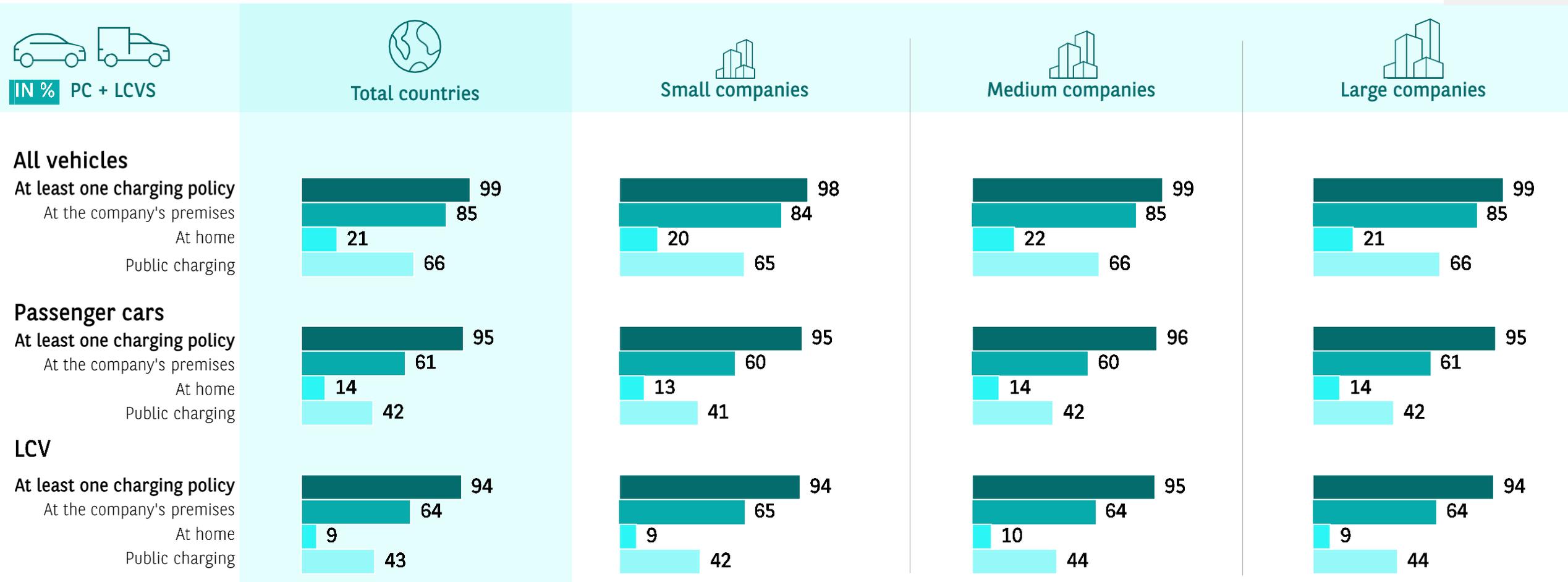
E31. What charging policy does your company currently use, or what policy will it use in the future?

Basis: companies with corporate vehicles = 100%

HOW TO READ THE RESULTS ?

Overall, 99% of the companies have or will have at least one charging policy in the future for all vehicles.

New question



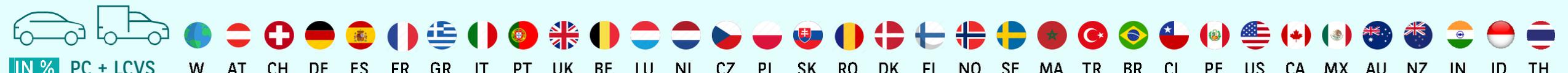
E31. What charging policy does your company currently use, or what policy will it use in the future?

Basis: companies with corporate vehicles = 100%

HOW TO READ THE RESULTS ?

Overall, 99% of the companies have or will have at least one charging policy in the future for all vehicles.

New question



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	99	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

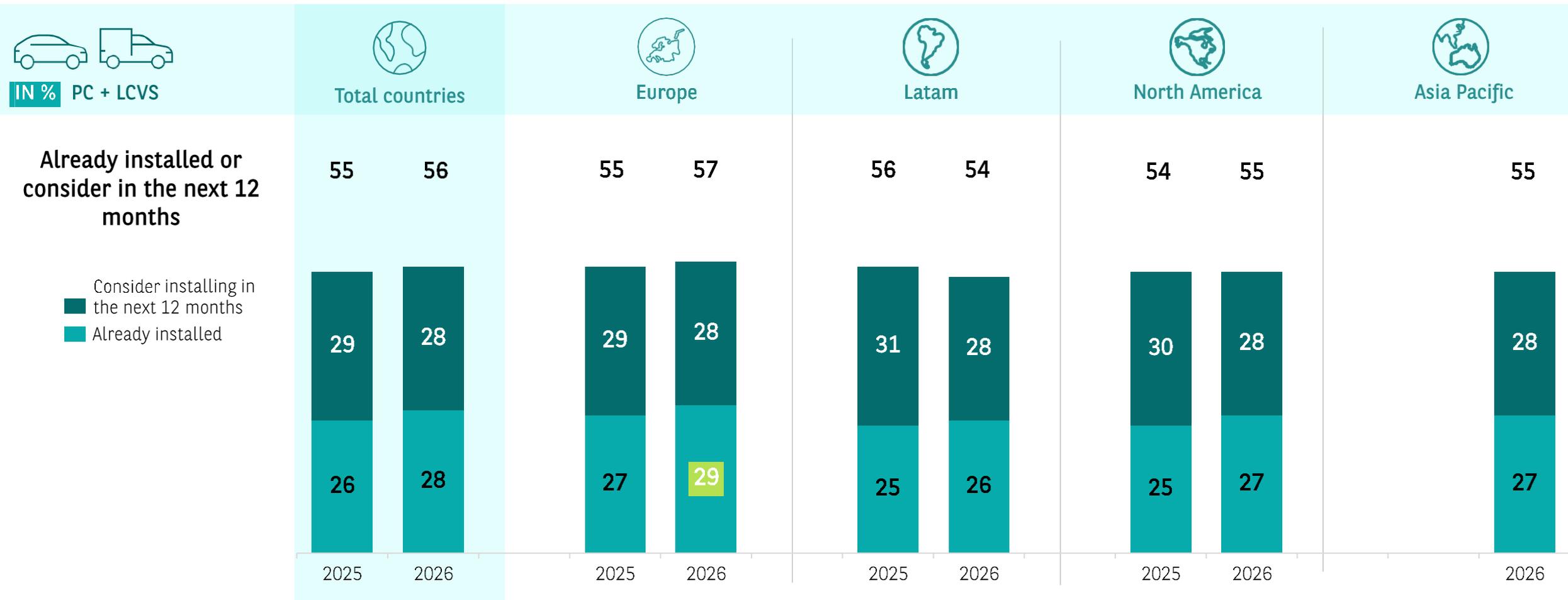
E31. What charging policy does your company currently use, or what policy will it use in the future?

Basis: companies with corporate vehicles = 100%

INSTALLATION OF CHARGING POINTS AT COMPANY'S PREMISES

HOW TO READ THE RESULTS ?

Overall in 2026, 56% 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.



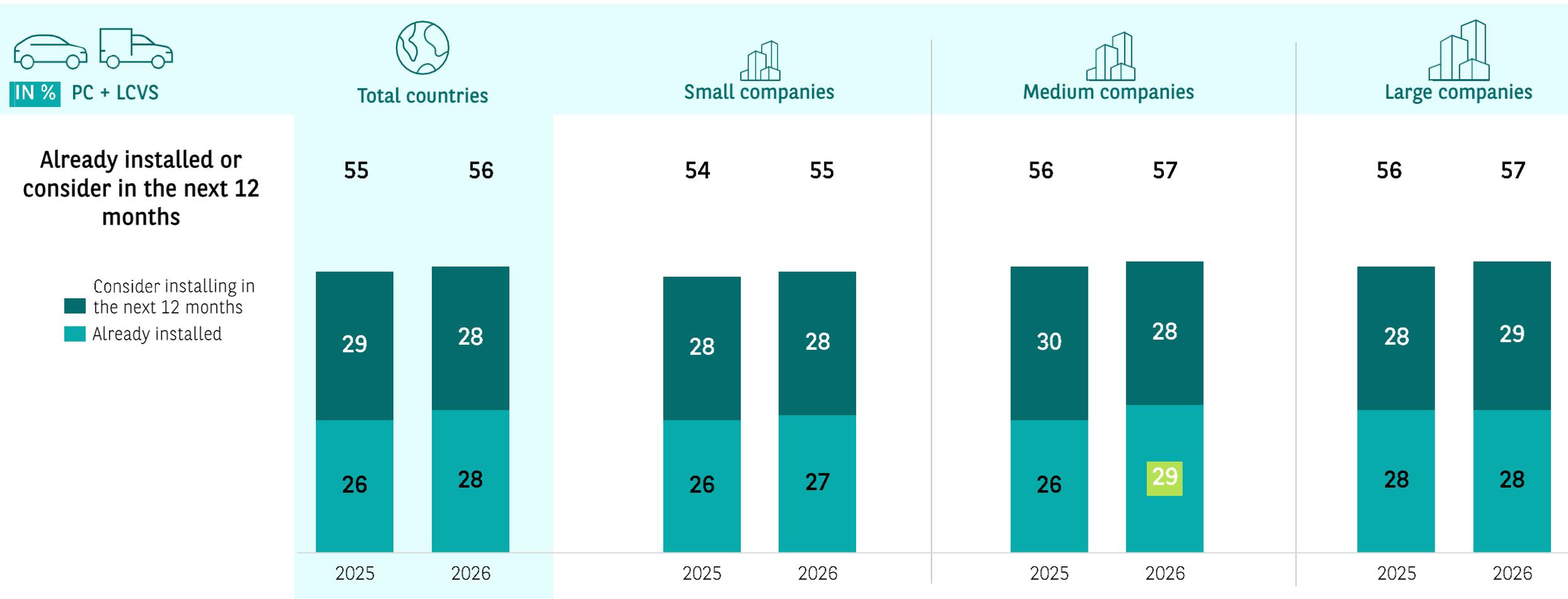
E32. Regarding charging at the company's premises, have you already installed charging points, or are you considering doing so in the next 12 months?
Basis: companies that are using or considering charging at the company's premises for passenger car or LCVs

X% Significantly higher/lower vs. previous wave

INSTALLATION OF CHARGING POINTS AT COMPANY'S PREMISES

HOW TO READ THE RESULTS ?

Overall in 2026, 56% 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.



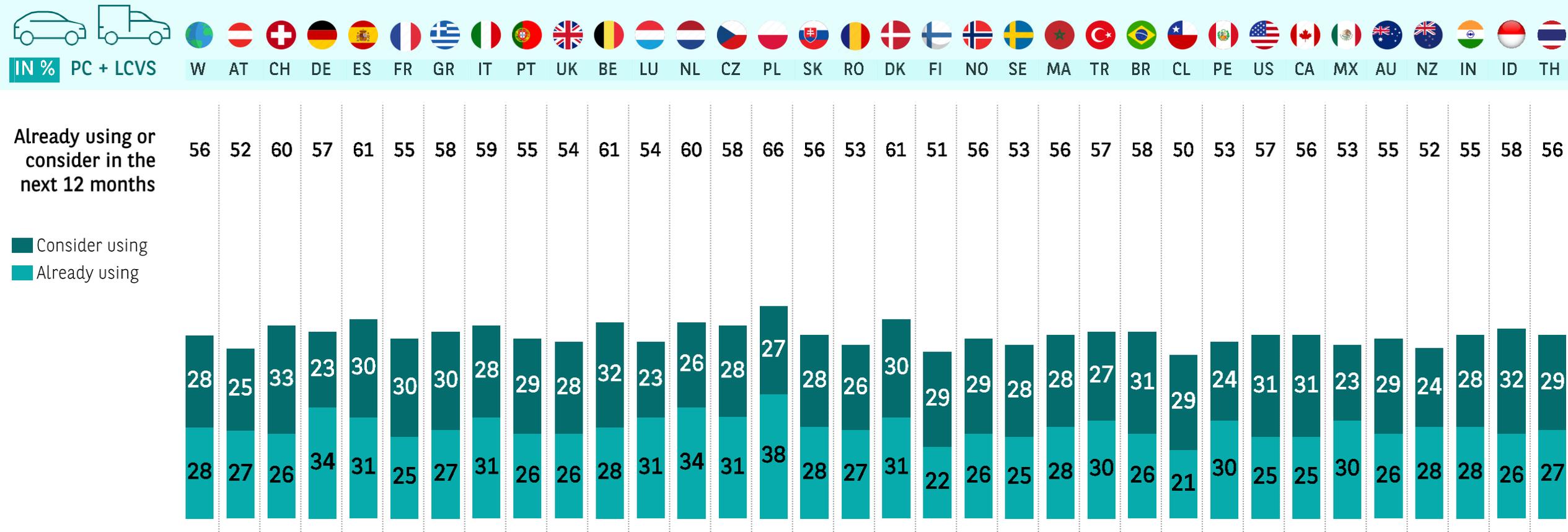
E32. Regarding charging at the company's premises, have you already installed charging points, or are you considering doing so in the next 12 months?
Basis: companies that are using or considering charging at the company's premises for passenger car or LCVs

X% Significantly higher / lower vs. previous wave

INSTALLATION OF CHARGING POINTS AT COMPANY'S PREMISES

HOW TO READ THE RESULTS ?

Overall in 2026, 56% 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?

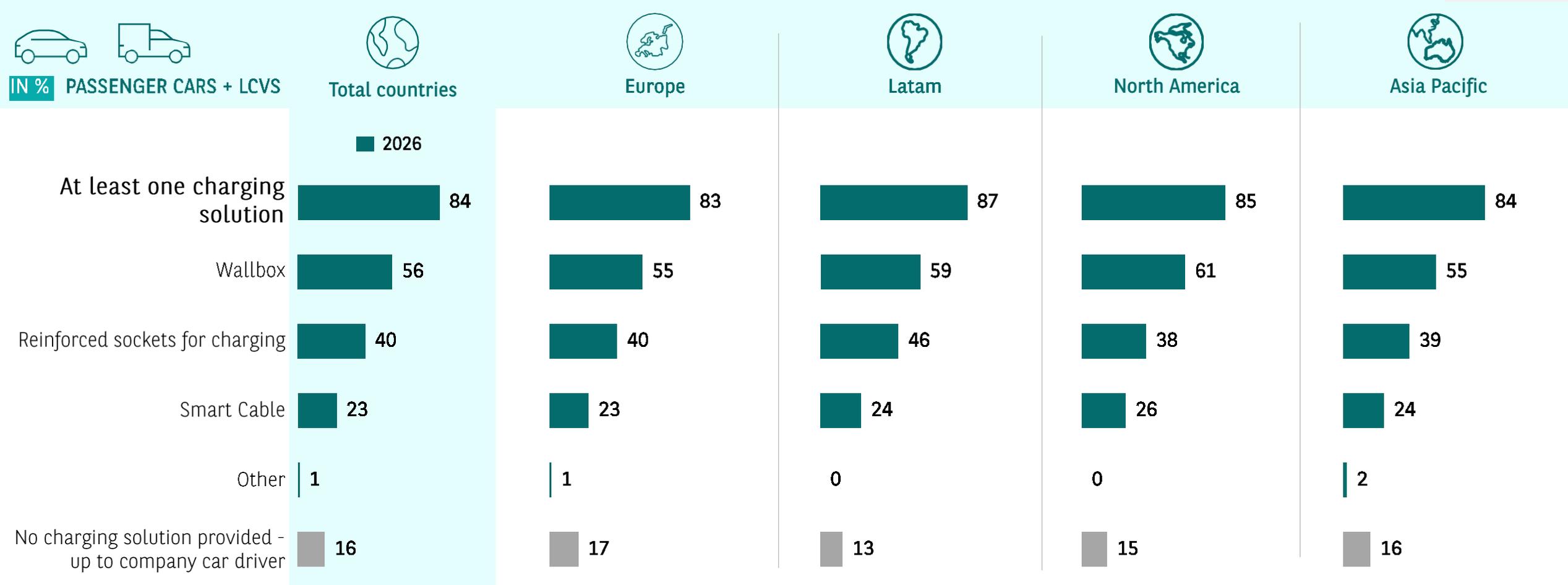
Basis: companies that are using or considering charging at the company's premises for passenger car or LCVs

TYPE OF HOME CHARGING POINTS

HOW TO READ THE RESULTS ?

Overall in 2026, 84% 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



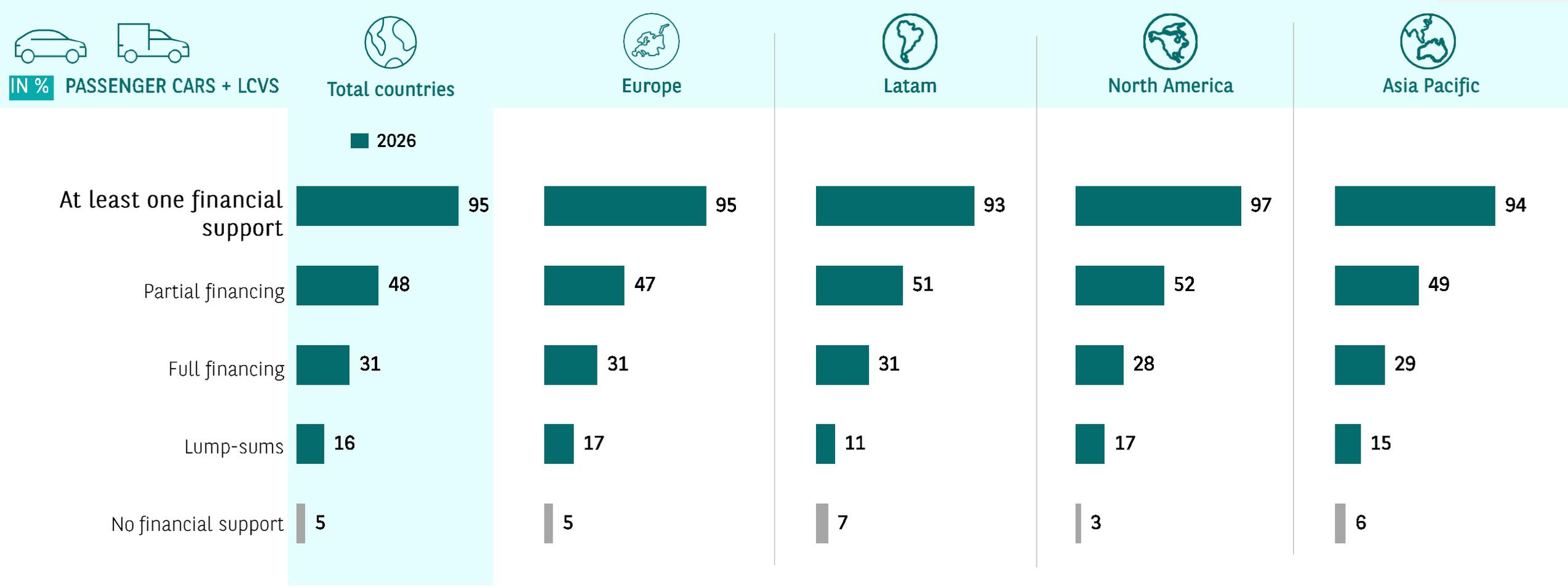
E34.NEW. Regarding home charging, what kind of home charging solutions does your company offer or plan to offer for the company car drivers?
Basis: companies that are using or considering home charging for passenger car or LCVs

TYPE OF FINANCIAL SUPPORT FOR HOME CHARGING POINTS

HOW TO READ THE RESULTS ?

Overall in 2026, 95% 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 plan to do so in the next 12 months.

New question



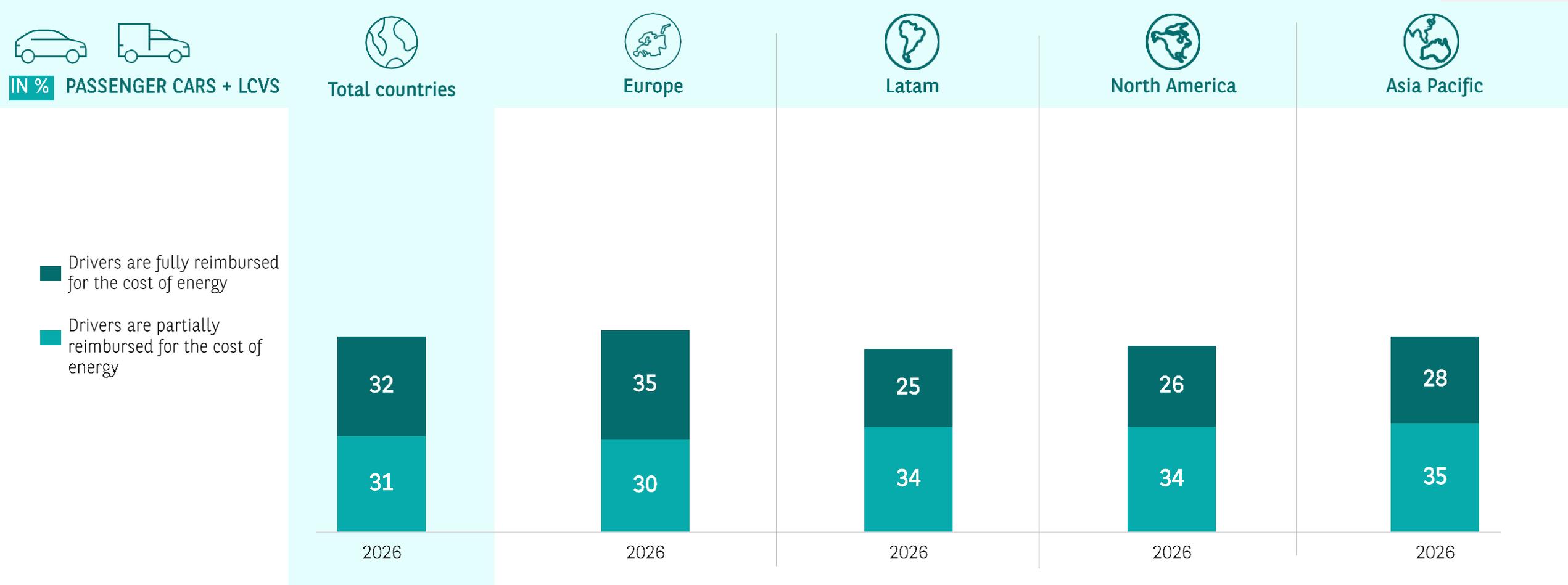
E35.NEW. How does your company financially support the provision of home charging solutions to company car drivers, or plans to do so in the next 12 months?
Basis: companies that offer or plan to offer at least one charging solution to company drivers

COST MANAGEMENT OF HOME CHARGING POINTS

HOW TO READ THE RESULTS ?

Overall 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



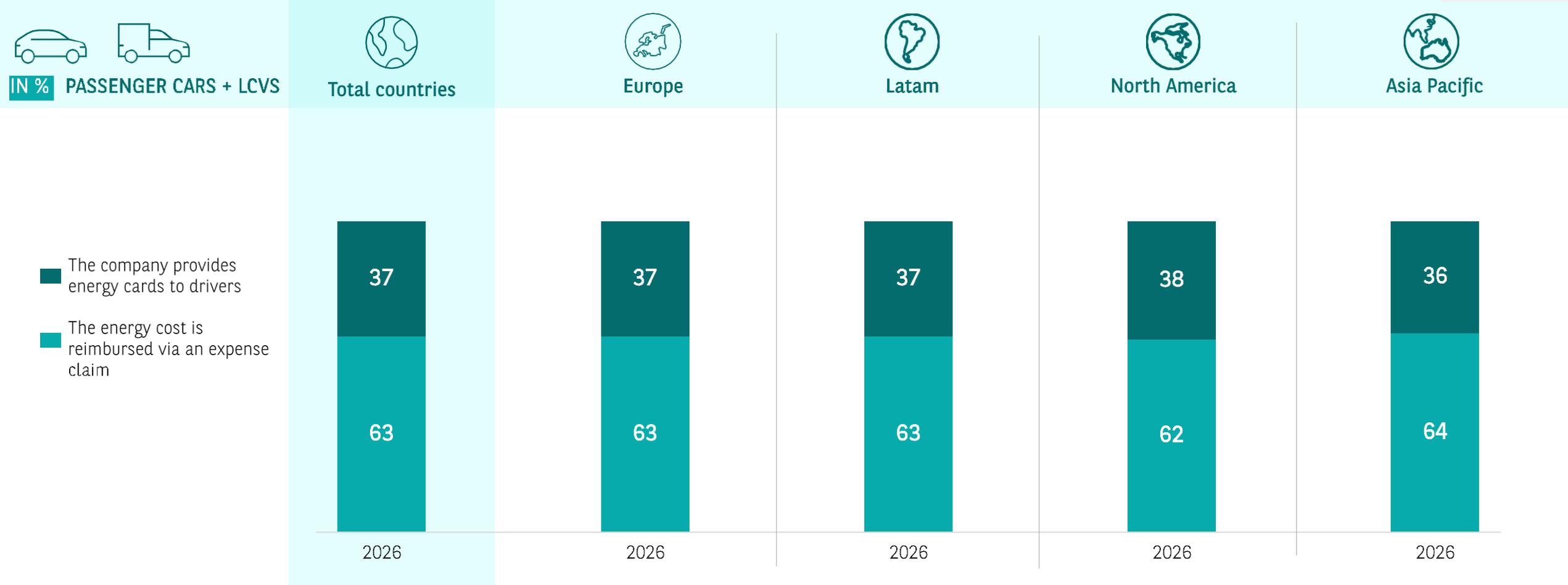
E36. How do you manage or plan to manage the energy costs of home charging for company car drivers??
 Basis: companies that are already financially supporting or are considering financially supporting home charging points

PUBLIC CHARGING COST

HOW TO READ THE RESULTS ?

Overall 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

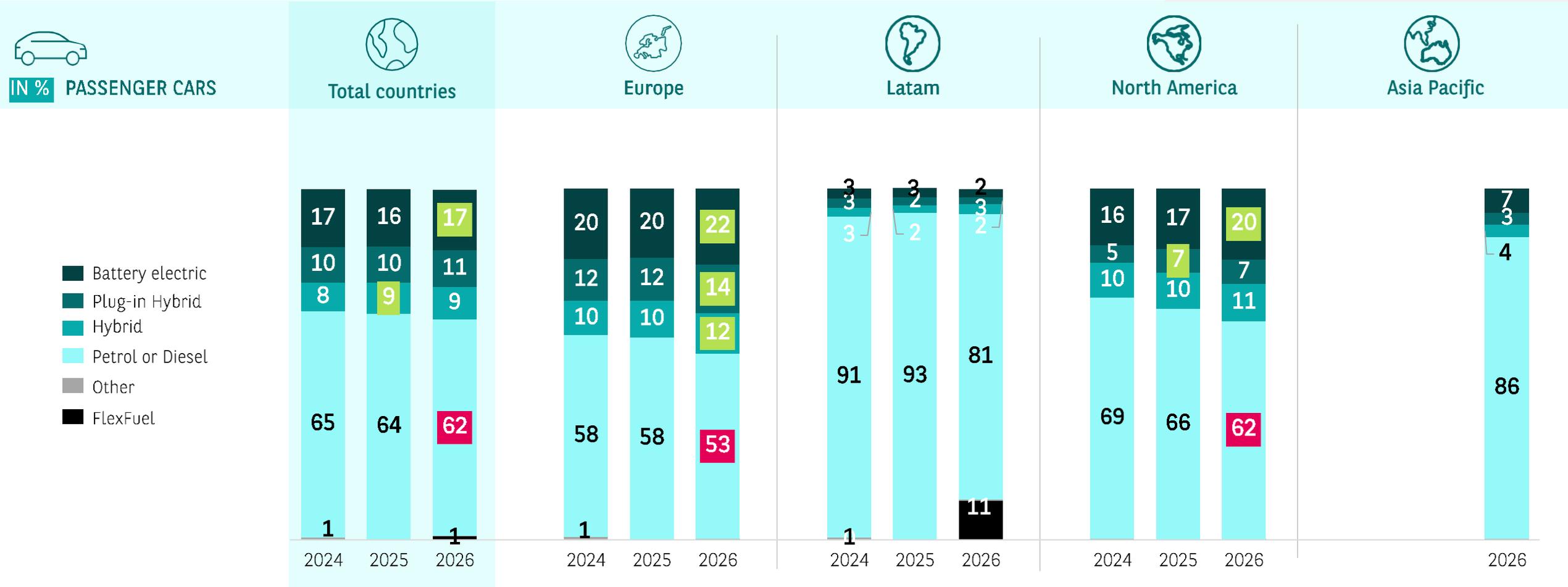
EXPECTED FLEET SHARE PER ENERGY

FOCUS ON PASSENGER CARS

HOW TO READ THE RESULTS ?

Overall in 3 years, 17% 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

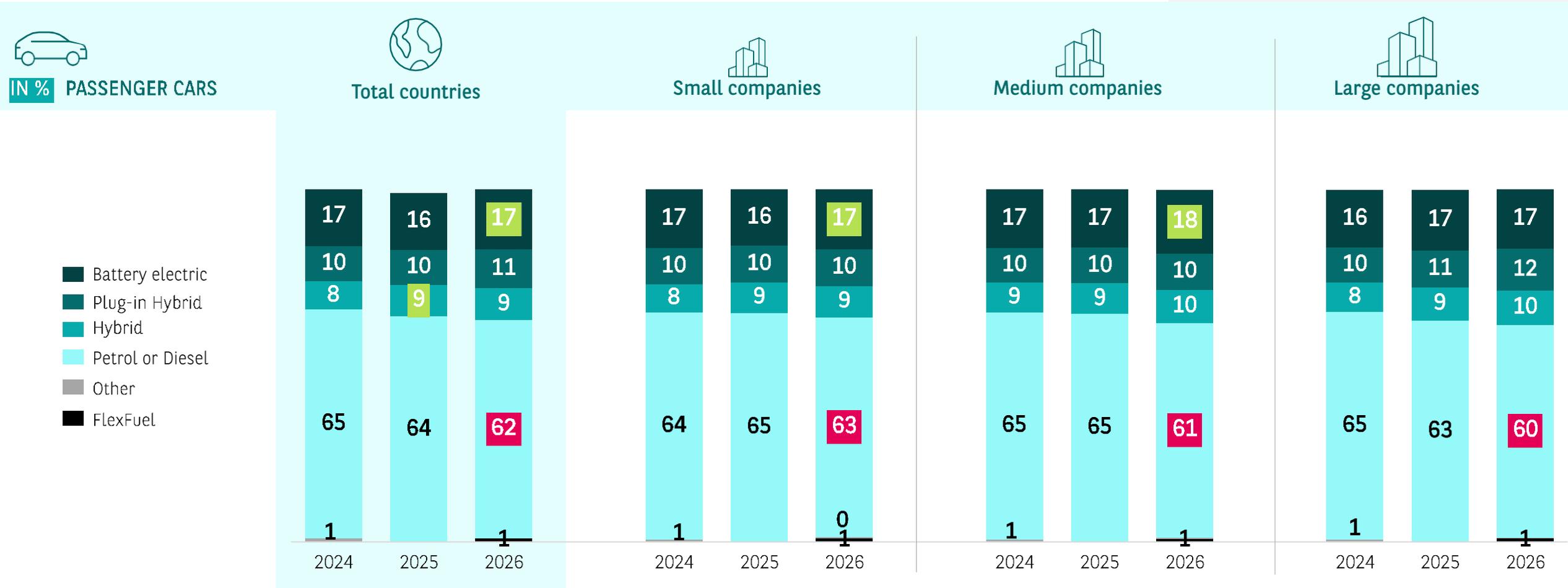
EXPECTED FLEET SHARE PER ENERGY

FOCUS ON PASSENGER CARS

HOW TO READ THE RESULTS ?

Overall in 3 years, 17% 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

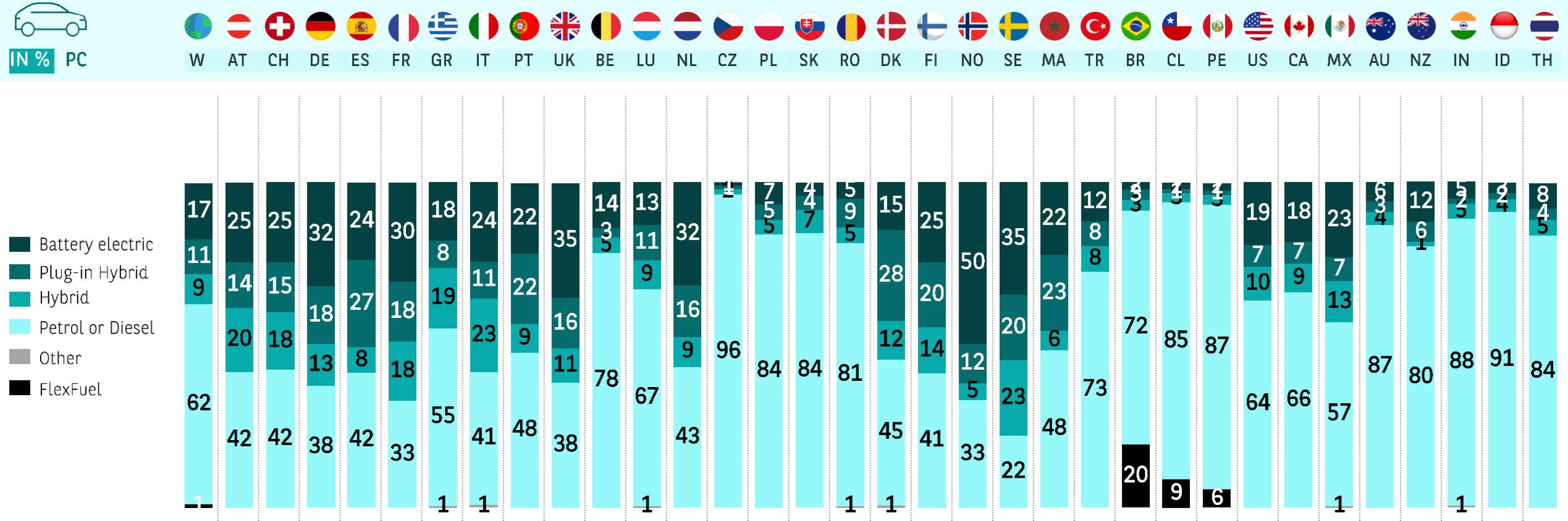
EXPECTED FLEET SHARE PER ENERGY

FOCUS ON PASSENGER CARS

HOW TO READ THE RESULTS ?

Overall in 3 years, 17% of the passenger car fleet is expected to be BEV.

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



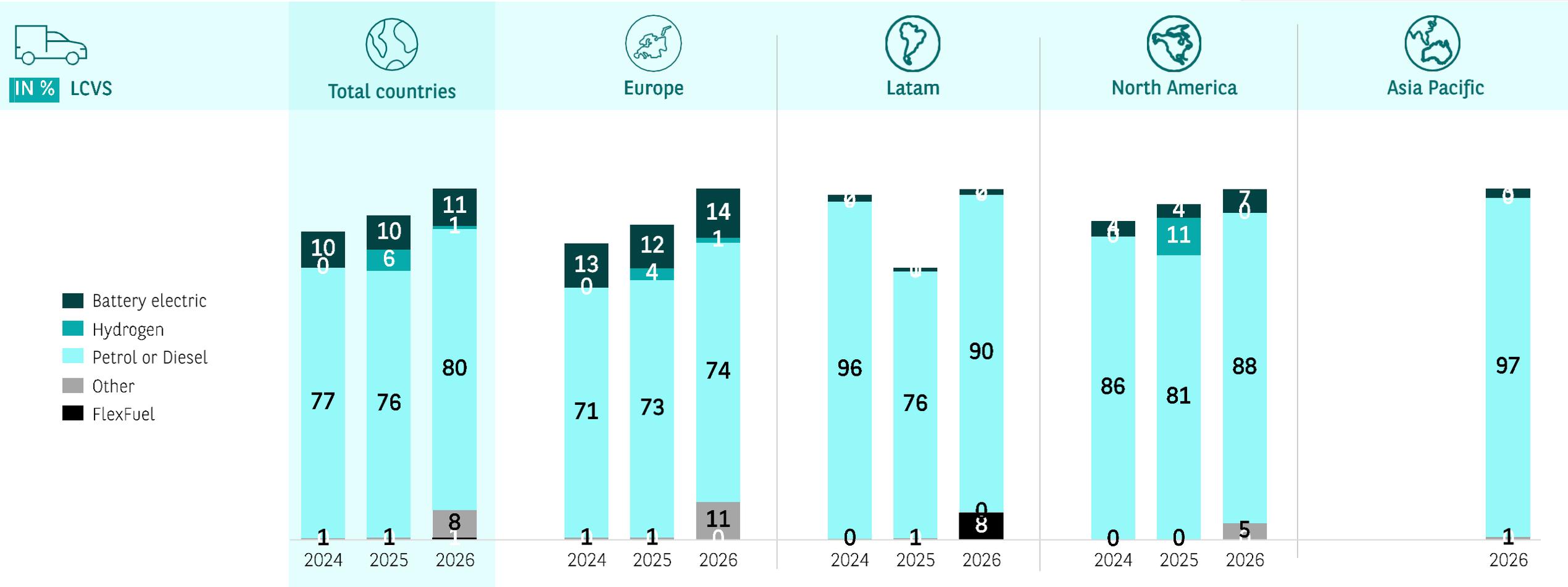
A52. What percentage of your passenger car fleet do you expect to be: battery electric, Plug-in Hybrid, Hybrid, petrol or diesel vehicles in 3 years?
Basis: companies with passenger cars

EXPECTED FLEET SHARE PER ENERGY FOCUS ON LCVS

HOW TO READ THE RESULTS ?

Overall in 3 years, 11% 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

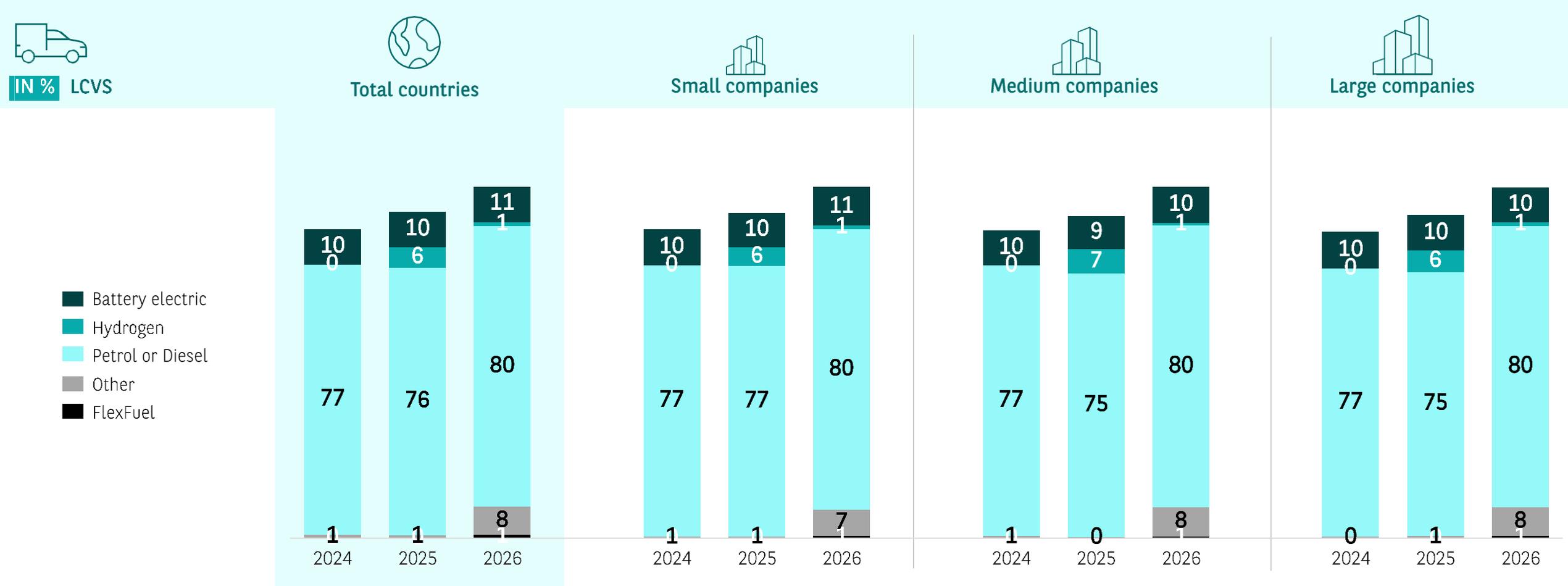
EXPECTED FLEET SHARE PER ENERGY

FOCUS ON LCVs

HOW TO READ THE RESULTS ?

Overall in 3 years, 11% 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

X% Significantly higher / lower vs. previous wave

EXPECTED FLEET SHARE PER ENERGY

FOCUS ON LCVs

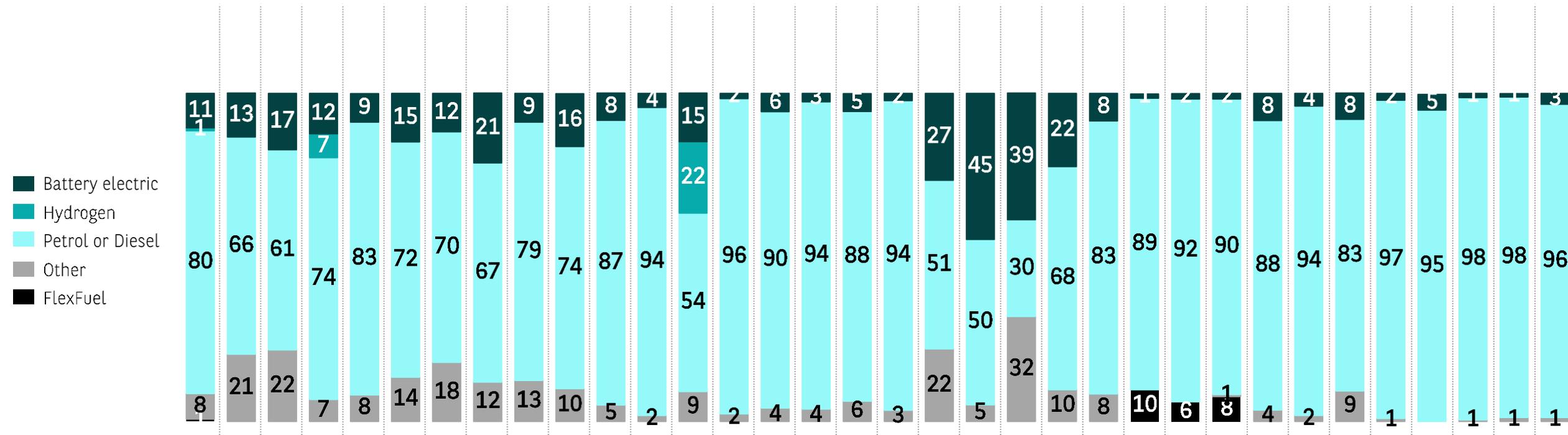
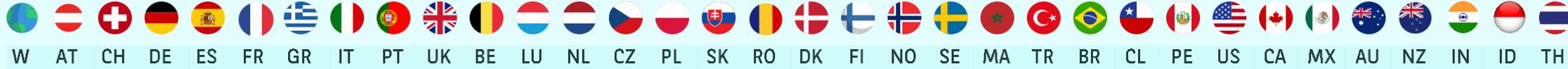
HOW TO READ THE RESULTS ?

Overall in 3 years, 11% 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

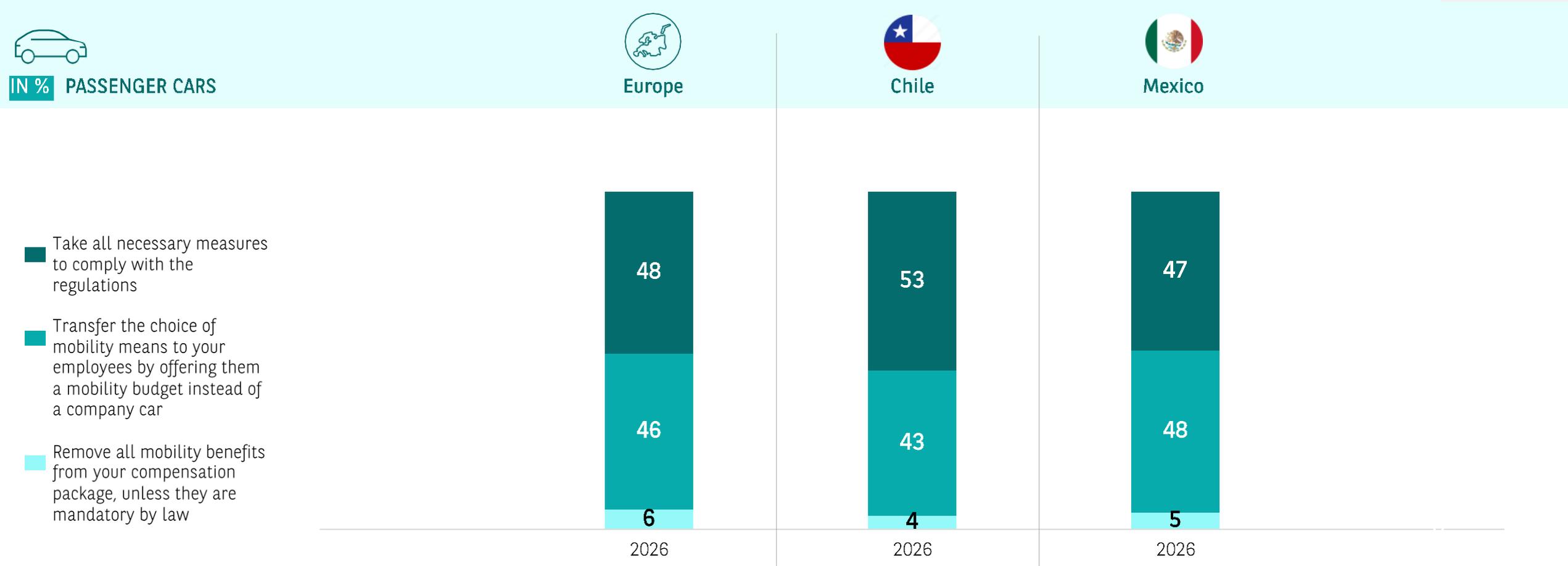


A53. What percentage of your LCV fleet do you expect to be: battery electric, petrol or diesel or Hydrogen fuel cell] vehicles in 3 years?
Basis: companies with LCVs

HOW TO READ THE RESULTS ?

In Europe in 2026, 48% of the companies with passenger cars would take all necessary measures to comply with the regulations, if regulations required them to switch their fleet of passenger company cars exclusively to battery electric vehicles (BEVs) by 2030 at the latest.

New question

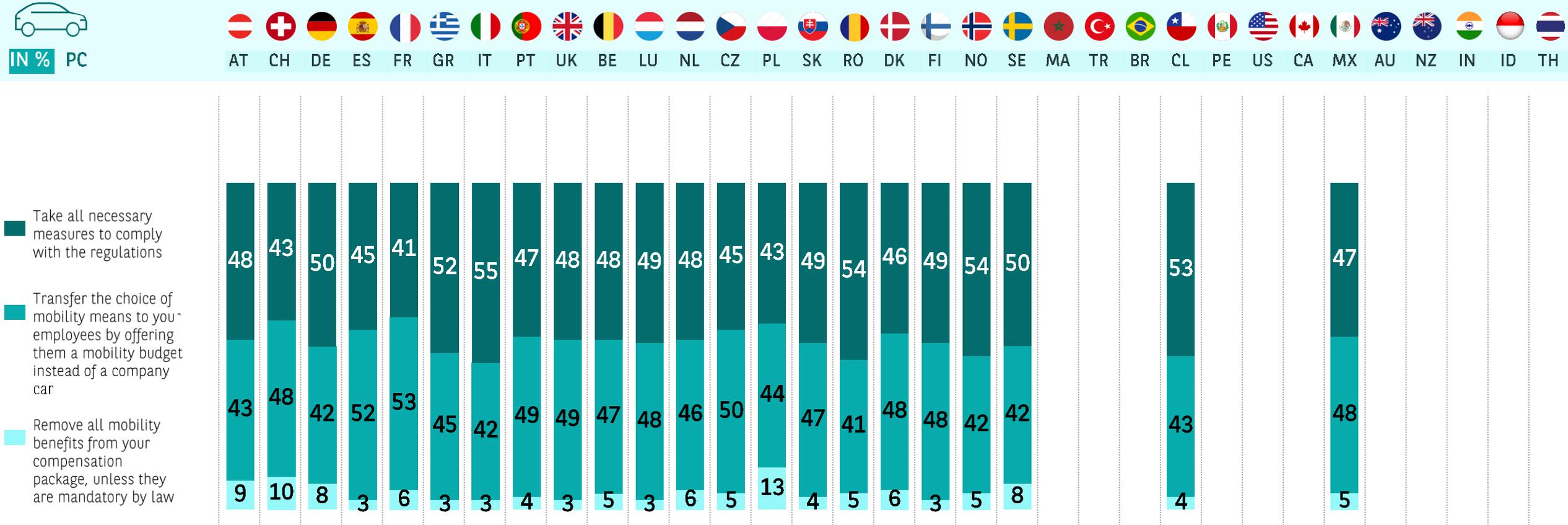


E38. What would you do if regulations required you to switch your fleet of passenger company cars exclusively to battery electric vehicles (BEVs) by 2030 at the latest?
Basis: companies with passenger cars

HOW TO READ THE RESULTS ?

Overall in 2026, 48% of the companies with passenger cars would take all necessary measures to comply with the regulations, if regulations required them to switch their fleet of passenger company cars exclusively to battery electric vehicles (BEVs) by 2030 at the latest.

New question



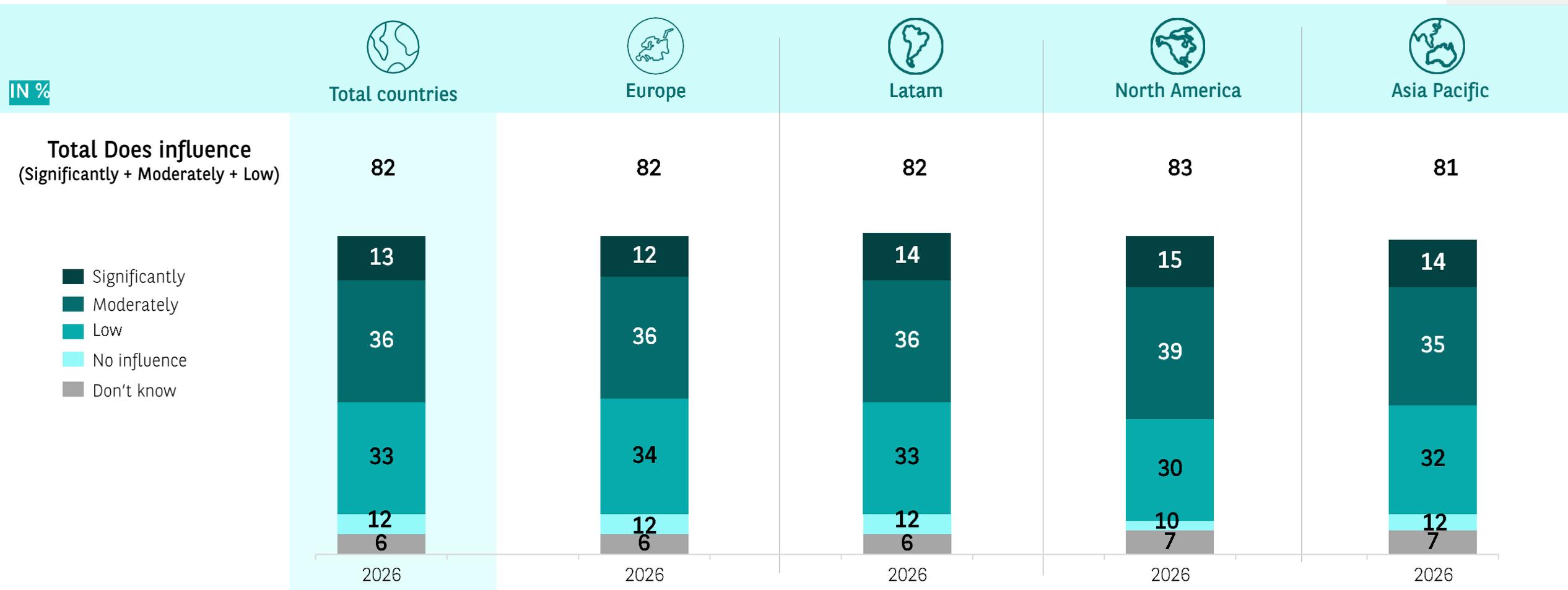
E38. What would you do if regulations required you to switch your fleet of passenger company cars exclusively to battery electric vehicles (BEVs) by 2030 at the latest?
Basis: companies with passenger cars

INFLUENCE OF LEASING PROVIDER ON ENERGY MIX CHOICES

HOW TO READ THE RESULTS ?

In 2026, 82% 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

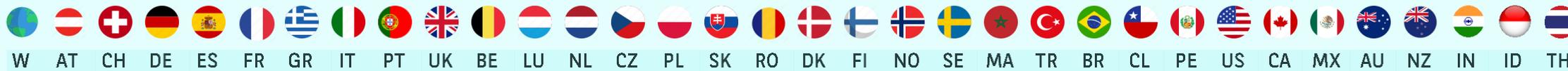
INFLUENCE OF LEASING PROVIDER ON ENERGY MIX CHOICES

HOW TO READ THE RESULTS ?

In 2026, 82% 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.

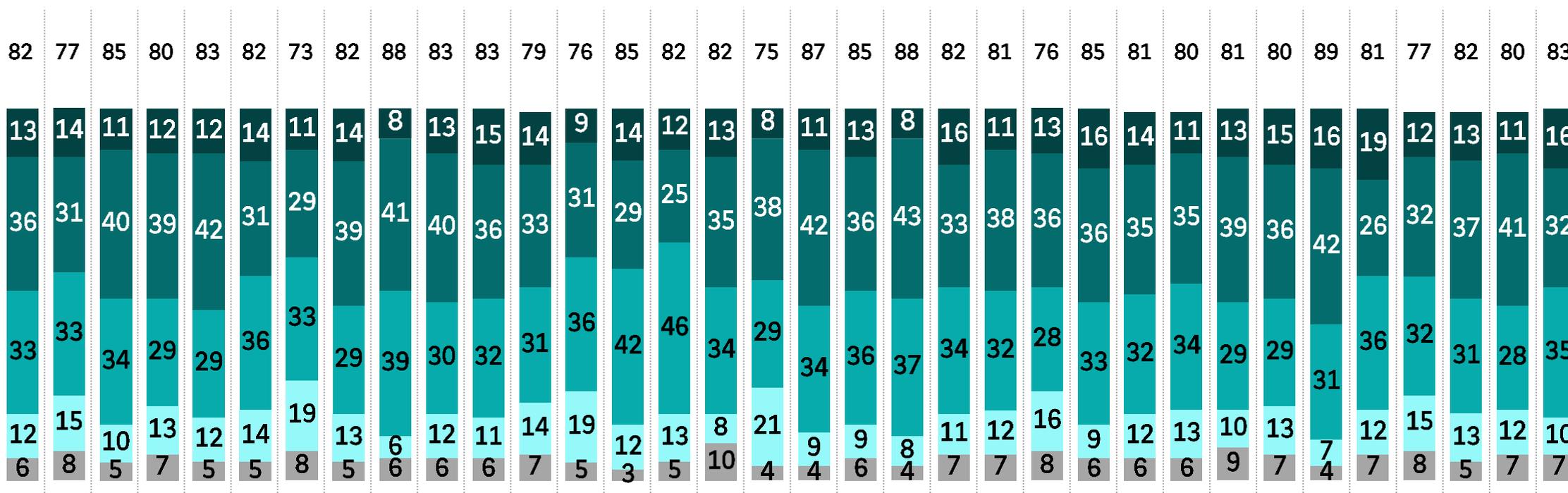
[New question](#)

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

04

CONNECTED FLEETS

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



Overall, telematics are well implemented in fleets, with progress in LATAM and North America

40% of companies have connected vehicles for all or part of their fleet, from 37% in Europe and 38% in APAC to 48% in North America and 49% in LATAM (a 6-point increase for both).

This increase in equipment in LATAM is driven by a 3-point increase in connected LCVs.

The potential for telematics data is promising, with rising usage and high consideration

Although still in its early stages, the use of data from telematics platforms has grown in 2026, with 17% of companies now utilizing the data—a 2-point increase. Meanwhile, a significant 47% of companies are still considering leveraging this data, maintaining its potential.

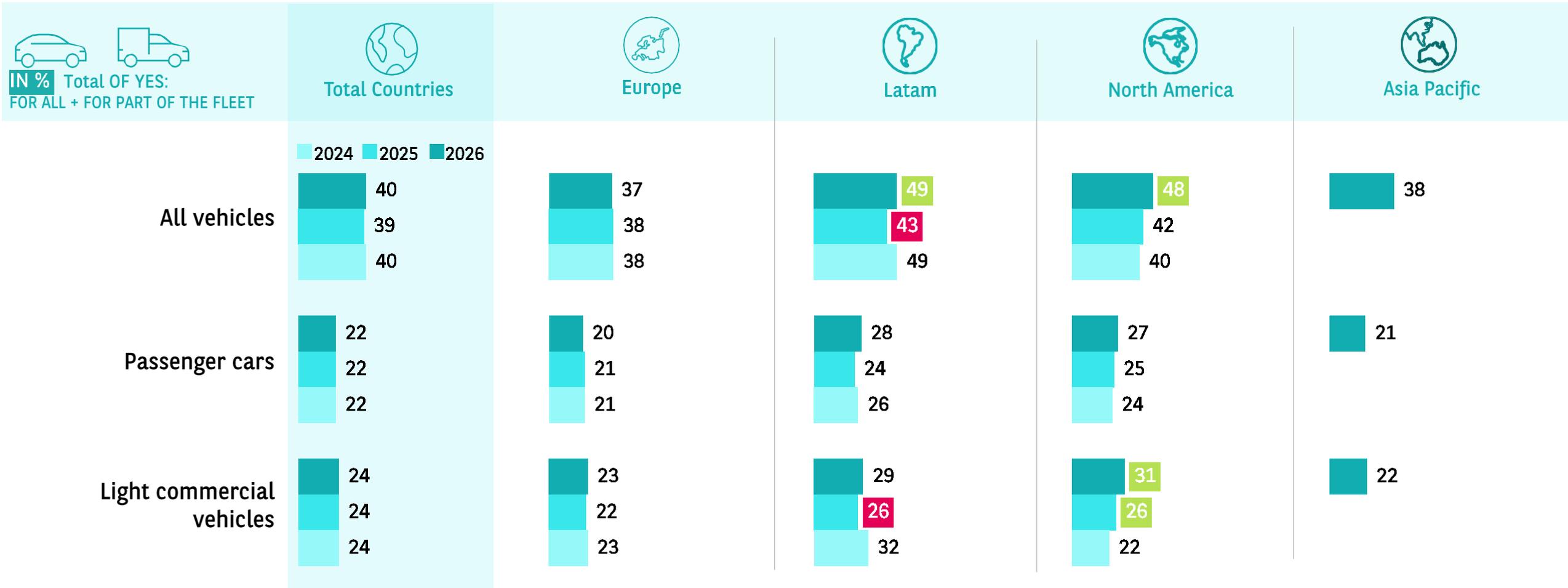
Indeed, telematics data offers benefits for enhancing vehicle and driver safety

The top two reasons for companies using telematics data or considering doing so are locating vehicles (claimed by 31% for passenger cars and 30% for LCV) and improving drivers' safety (claimed by 30% for passenger cars and 27% for LCV), followed by improving operational efficiency (claimed by 23% for passenger cars and 22% for LCV).

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

HOW TO READ THE RESULTS ?

Overall in 2026, 40% of the companies have connected vehicles for all or part of their fleet. 22% have connected passenger cars and 24% 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 ?

Overall in 2026, 40% of the companies have connected vehicles for all or part of their fleet. 22% have connected passenger cars and 24% have connected LCVs.

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

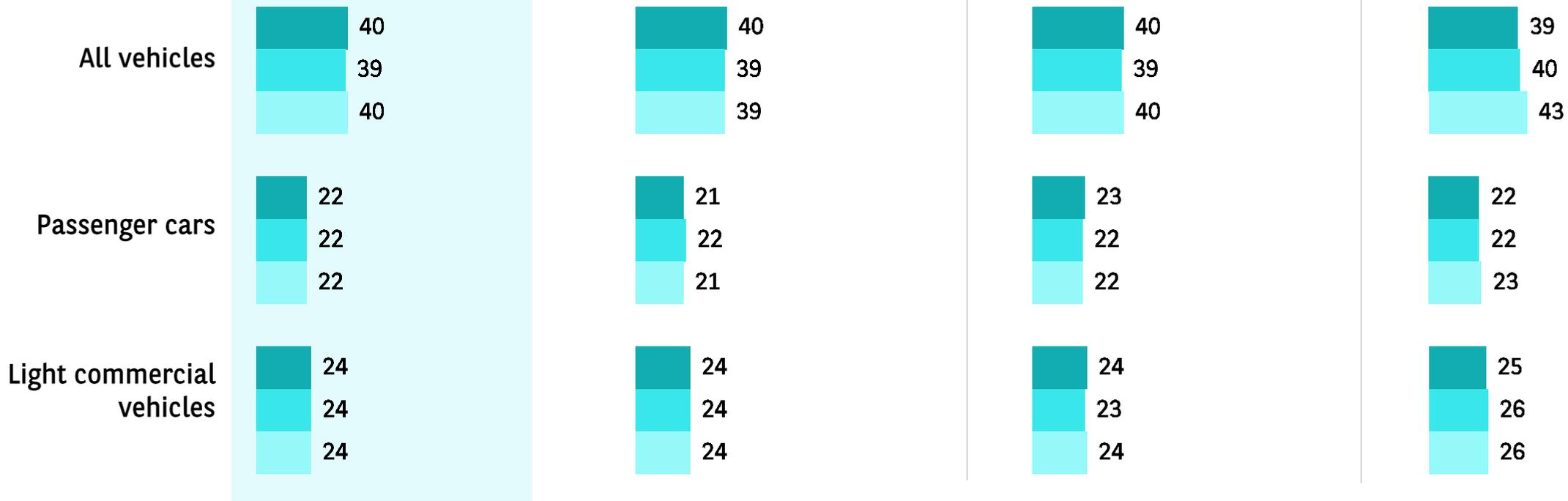
Total Countries

Small companies

Medium companies

Large companies

2024 2025 2026



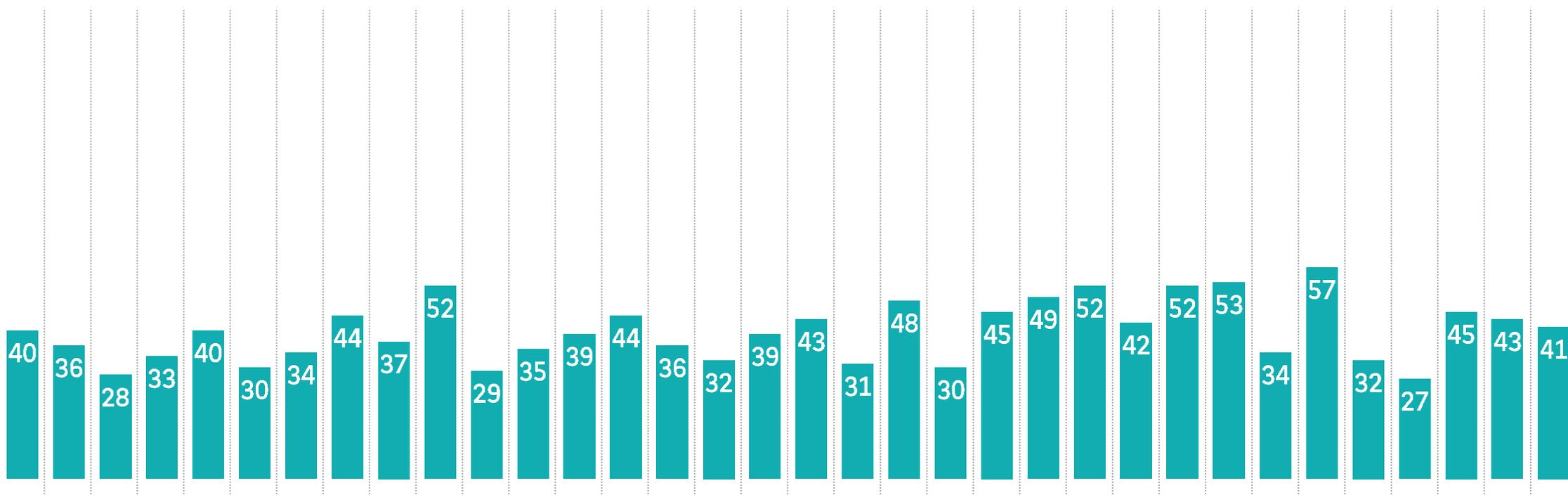
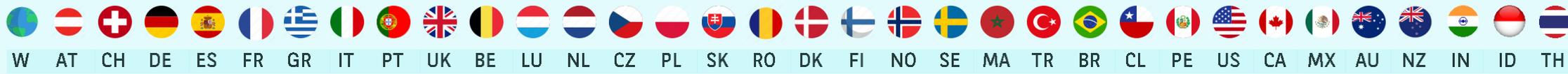
E23c. Is your fleet connected thanks to a telematic tool?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

HOW TO READ THE RESULTS ?

Overall in 2026, 40% of the companies have connected vehicles for all or part of their fleet.



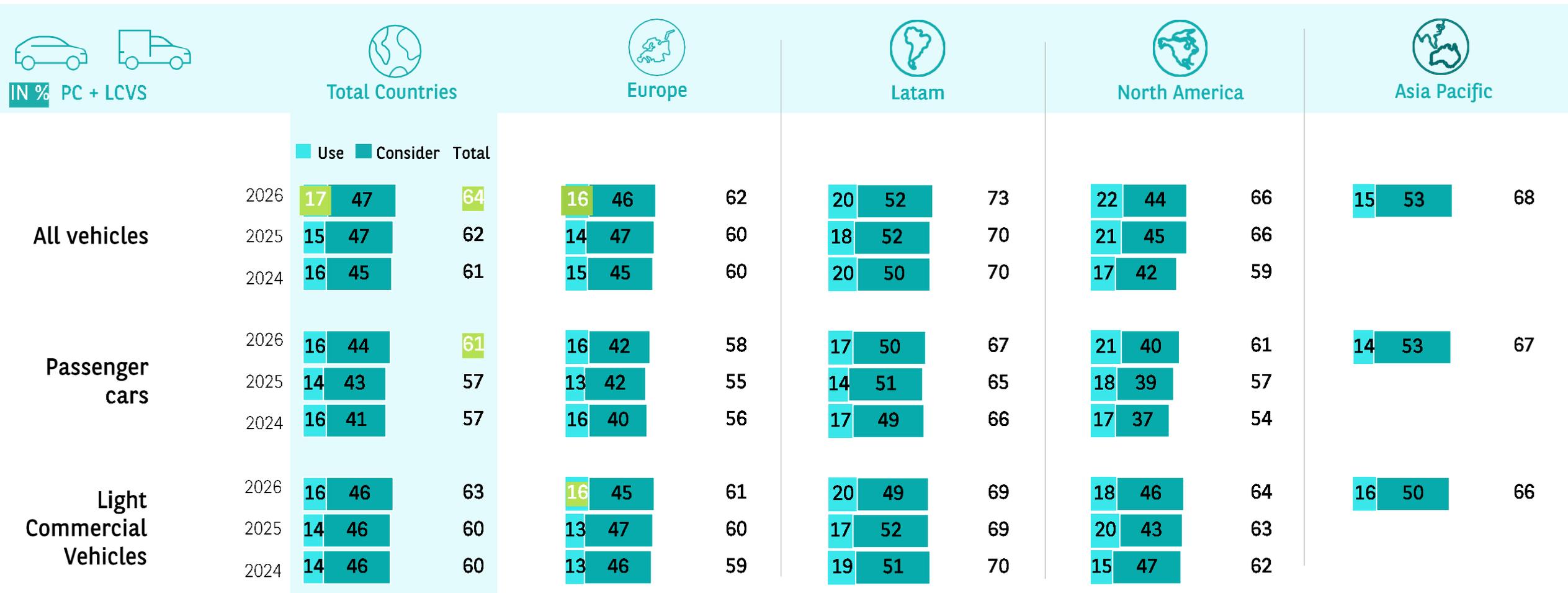
E23c. Is your fleet connected thanks to a telematic tool?
Basis: companies with corporate vehicles = 100%



PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

HOW TO READ THE RESULTS ?

Overall in 2026, 64% 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 ?

Overall in 2026, 64% 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.

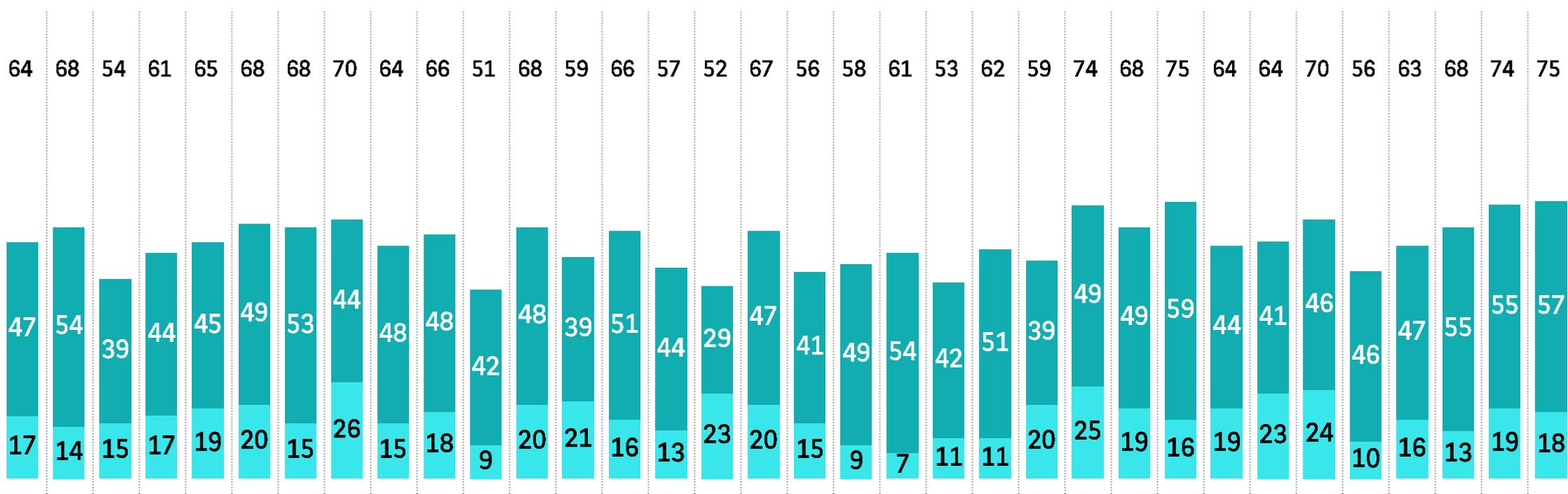


IN % PC + LCVS



Already using or consider in the next 12 months

Consider using
Already using



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

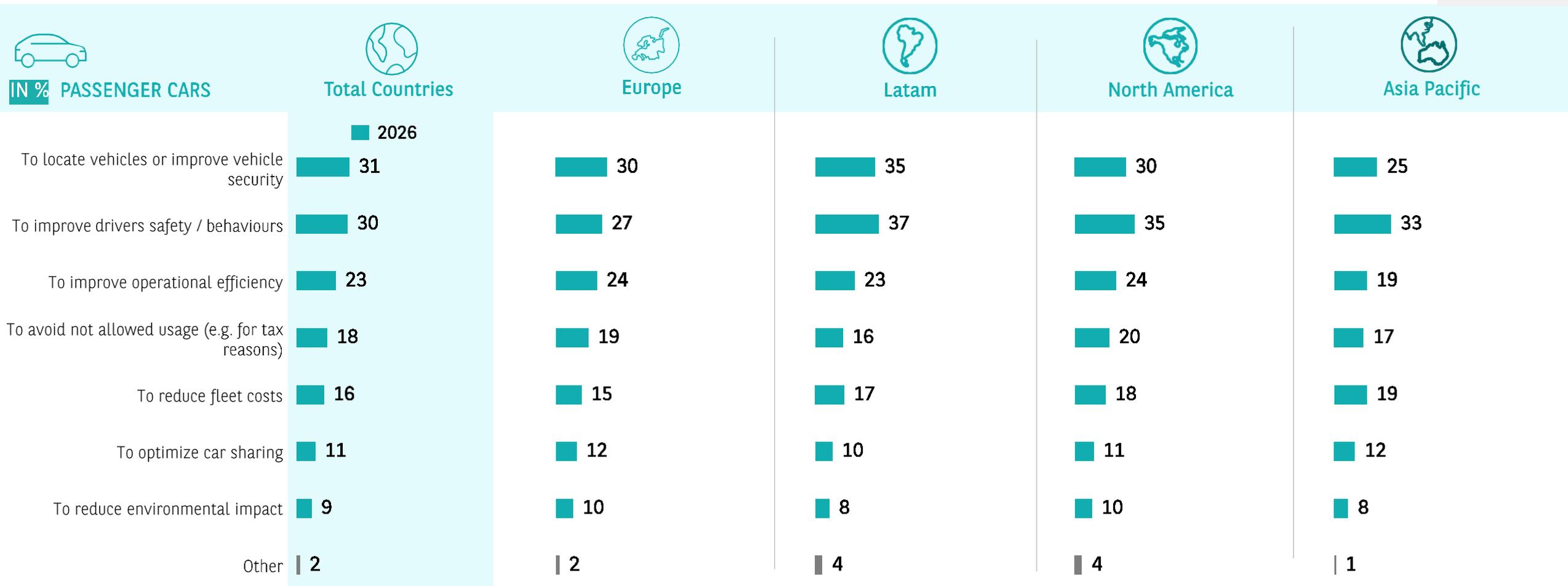


REASONS FOR USING TELEMATICS DATA FOR PASSENGER CARS

HOW TO READ THE RESULTS ?

Overall in 2026, 31% of the companies that are already using data or considering doing so, declare that the main reason to use Telematics data for passenger cars is: To locate vehicles or improve vehicle security.

New question



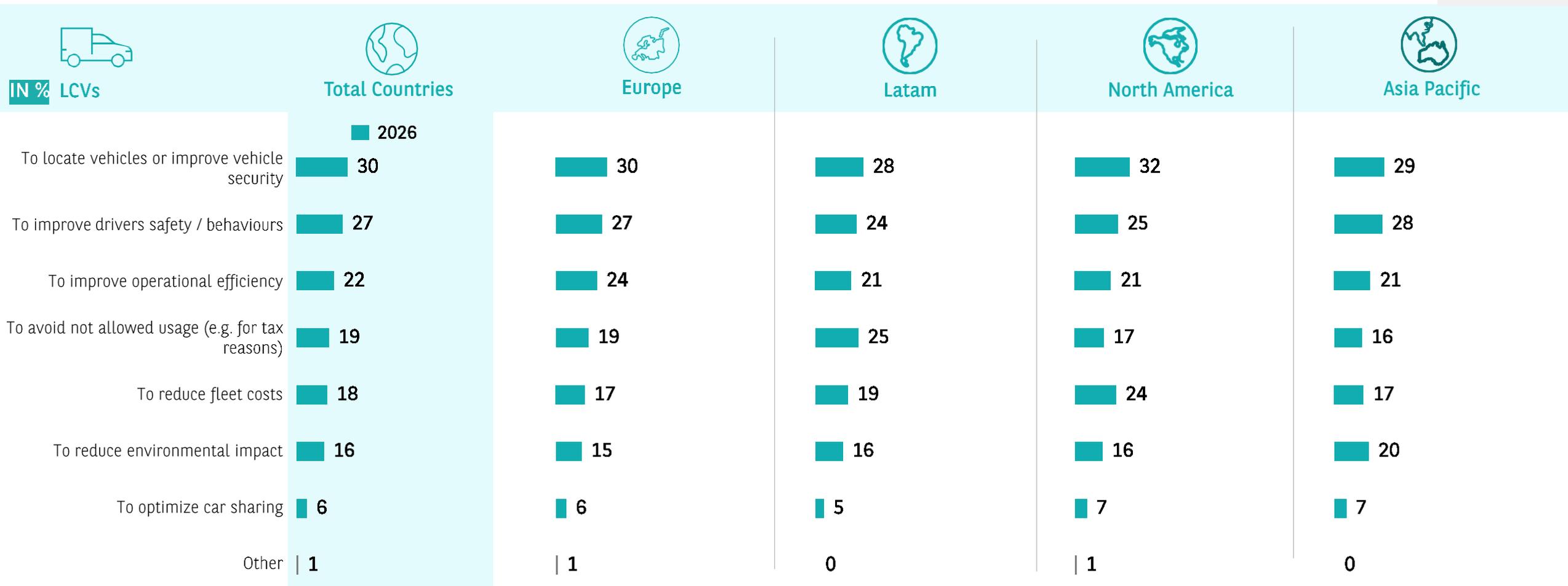
E25AB. What are or would be the two main reasons for you to use telematics data to manage your fleet?
Basis: companies already using data coming from Telematics or considering doing so for passenger cars

REASONS FOR USING TELEMATICS DATA FOR LCVs

HOW TO READ THE RESULTS ?

Overall in 2026, 30% of the companies that are already using data or considering doing so, declare that the main reason to use Telematics data for LCVs is : To locate vehicles or improve vehicle security.

New question



E25AB. What are or would be the two main reasons for you to use telematics data to manage your fleet?
Basis: companies already using data coming from Telematics or considering doing so for LCVs

05

EMPLOYEE MOBILITY

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



The implementation of corporate mobility policies and solutions has developed in 2026

94% of companies have implemented at least one mobility policy or solutions or are planning to do so (a 5-point increase).

This progress can be seen across company sizes and across regions:

- 93% in Europe (a 5-point increase).
- 98% in LATAM (a 3-point increase).
- 98% in North America (a 4-point increase).

And APAC region is slightly below but still: 91%.

After a drop in 2025, private lease/salary sacrifice rebounds, while ride sharing/carpooling rises significantly

After decreasing last year, the level of private lease/salary sacrifice has returned to its level from two years ago: already implemented or considered by 25% of companies. This rebound can be seen both in Europe (24%, a 11-point increase) and in LATAM (33%, a 12-point increase), while it keeps on growing in North America (22%, a 4-point increase) and seems well widespread in APAC (28%).

Mobility budget and Personal vehicle expense reimbursement are also more widespread in 2026: 30% (a 1-point increase) and 22% (a 4-point increase) respectively.

In terms of mobility solutions, ride sharing/carpooling stands out with a significant rise in Europe (24%, an 8-point increase) and in LATAM (35%, a 13-point increase), while it remains stable in North America (31%) and seems particularly well widespread in APAC (38%).

Car sharing is also rising in LATAM (37%, a 10-point increase) and in North America (29%, an 8-point increase).

Overall, HR-related needs remain the main reason for implementing mobility policies and solutions

43% of companies claim that HR related-needs are their main motivation for providing mobility policies and solutions.

In Europe, CSR policies are also a key driver for 44% of the companies.

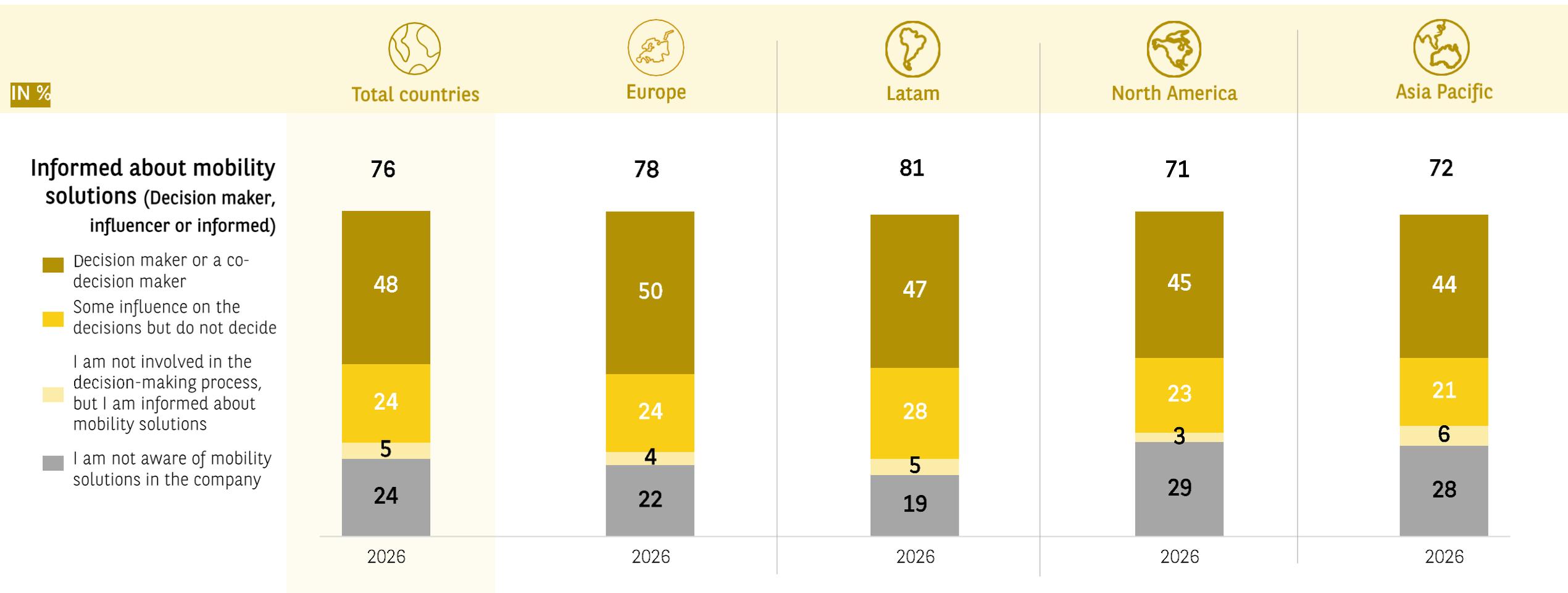
In LATAM, North America and APAC, anticipating upcoming regulations (39%, 40%, 35%) and tax benefits (41%, 34%, 39%) are also significant drivers.



RESPONDENTS' INVOLVEMENT IN MOBILITY SOLUTION DECISIONS

HOW TO READ THE RESULTS ?

Overall in 2026, 76% 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%

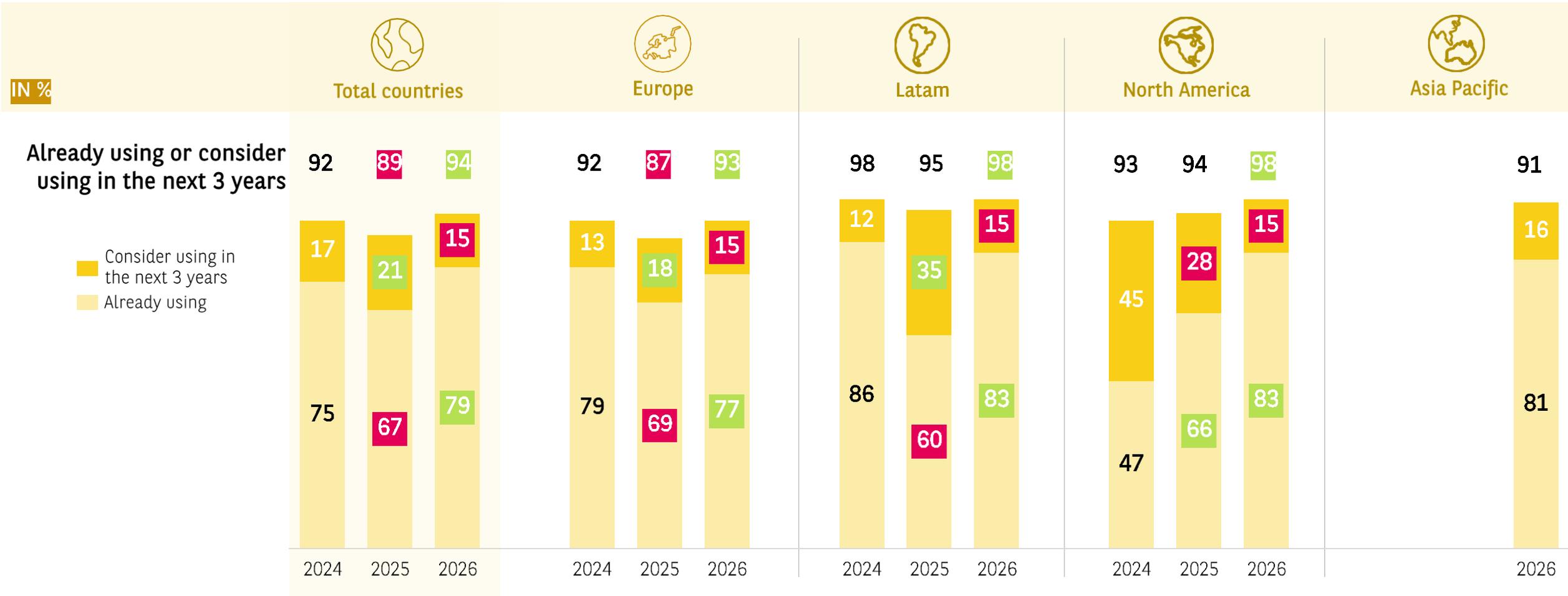


MOBILITY POLICIES AND SOLUTIONS IMPLEMENTATION

AT LEAST ONE MOBILITY POLICY AND SOLUTION

HOW TO READ THE RESULTS ?

Overall in 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%

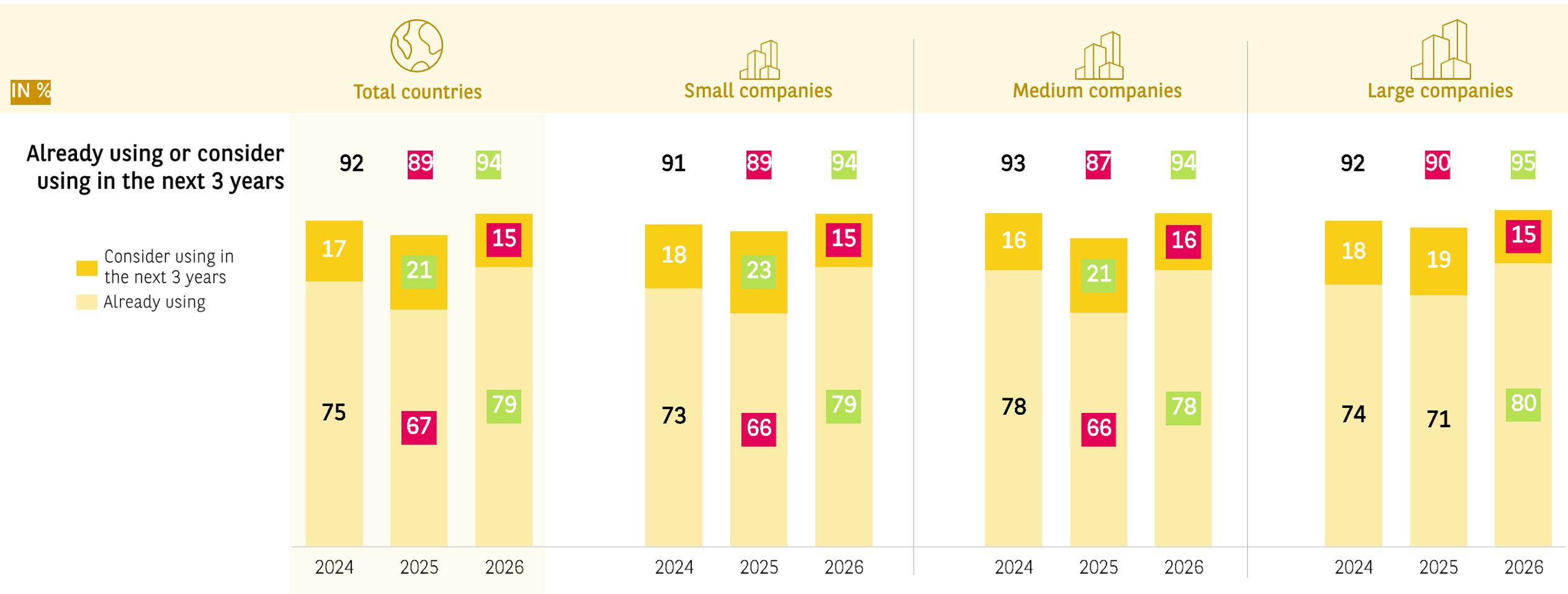
X% Significantly higher / lower vs. previous wave

MOBILITY POLICIES AND SOLUTIONS IMPLEMENTATION

AT LEAST ONE MOBILITY POLICY AND SOLUTION

HOW TO READ THE RESULTS ?

Overall 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

HOW TO READ THE RESULTS ?

Overall in 2026, 33% of the companies are already using Public transport expense reimbursement or are considering doing so in the next 3 years.

IN %	Total countries			Europe			Latam			North America			Asia Pacific		
	Use	Consider	Total	Use	Consider	Total	Use	Consider	Total	Use	Consider	Total	Use	Consider	Total
At least one mobility policy	62	21	83	62	19	63	65	24	89	66	38	89	60	27	88
Public transport expense reimbursement	21	12	33	22	11	33	22	18	40	14	14	28	19	11	30
Personal vehicle expense reimbursement	10	12	22	10	9	19	10	19	29	9	13	22	12	22	35
Mobility Budget	17	13	30	16	12	28	20	17	37	16	16	32	17	13	31
Private lease or salary sacrifice	14	11	25	14	10	24	18	15	33	9	13	22	16	12	28
A short or mid-term rental vehicle	18	10	28	19	8	28	14	12	26	20	14	34	16	13	30
Car or cash allowance	19	12	32	18	11	29	17	16	33	32	9	40	16	17	33

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 ?

Overall in 2026, 33% of the companies are already using Public transport expense reimbursement or are considering doing so in the next 3 years.

		Total countries	Europe	Latam	North America	Asia Pacific								
	IN %	2024	2025	2026	2024	2025	2026	2024	2025	2026	2024	2025	2026	2026
Public transport expense reimbursement	Use	21	19	21	23	21	22	25	17	22	11	13	14	19
	Total (use + consider)	31	32	33	32	33	33	41	36	40	21	31	28	30
Personal vehicle expense reimbursement	Use	-	8	10	-	8	10	-	8	10	-	7	9	12
	Total (use + consider)	-	19	22	-	16	19	-	28	29	-	21	22	35
Mobility Budget	Use	15	15	17	15	16	16	19	15	20	12	14	16	17
	Total (use + consider)	28	29	30	26	28	28	33	33	37	28	31	32	31
Private lease or salary sacrifice	Use	13	6	14	15	6	14	15	6	18	5	4	9	16
	Total (use + consider)	24	15	25	24	13	24	28	21	33	19	17	22	28
A short or mid term rental vehicle	Use	17	17	18	19	18	19	15	10	14	9	20	20	16
	Total (use + consider)	27	29	28	28	28	28	27	28	26	20	34	34	30
Car or cash allowance	Use	17	17	19	17	18	18	21	12	17	16	23	32	16
	Total (use + consider)	28	30	32	27	30	29	35	29	33	27	39	40	33

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 ?

Overall in 2026, 26% of the companies are already using Car sharing or are considering doing so in the next 3 years.

IN %	Total countries			Europe			Latam			North America			Asia Pacific		
	Use	Consider	Total	Use	Consider	Total	Use	Consider	Total	Use	Consider	Total	Use	Consider	Total
At least one mobility solution	46	27	72	44	24	67	47	37	83	52	32	84	53	28	81
Car sharing	14	12	26	14	10	24	16	21	37	15	13	29	14	13	27
Ride sharing	17	12	29	15	10	24	19	15	35	18	12	31	24	14	38
Bike Leasing	5	7	12	5	6	11	3	7	10	6	17	23	7	6	13
Bike Sharing	6	9	15	6	8	14	4	7	10	6	18	24	7	7	14
Scooter and moto leasing	5	8	13	5	6	12	3	6	10	6	18	24	6	8	14
An app provided by the company to book multiple mobility solutions	10	13	24	10	10	20	11	20	31	10	18	28	10	19	29
A card provided by the company to pay multiple mobility solution	8	13	21	8	11	18	6	20	26	9	15	24	10	16	27

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 ?

Overall in 2026, 26% of the companies are already using Car sharing or are considering doing so in the next 3 years.

		Total countries	Europe	Latam	North America	Asia Pacific								
	IN %	2024	2025	2026	2024	2025	2026	2024	2025	2026	2024	2025	2026	2026
Car sharing	Use	12	12	14	12	13	14	14	8	16	10	8	15	14
	Total (use + consider)	23	23	26	21	23	24	35	27	37	23	21	29	27
Ride sharing or car pooling	Use	19	8	17	18	7	15	22	7	19	22	13	18	24
	Total (use + consider)	29	19	29	28	16	24	34	22	35	37	30	31	38
Bike Leasing	Use	-	4	5	-	4	5	-	2	3	-	4	6	7
	Total (use + consider)	-	12	12	-	11	11	-	12	10	-	21	23	13
Bike Sharing	Use	-	5	6	-	5	6	-	2	4	-	5	6	7
	Total (use + consider)	-	15	15	-	14	14	-	12	10	-	23	24	14
Scooter and moto leasing	Use	-	4	5	-	4	5	-	1	5	-	3	6	6
	Total (use + consider)	-	13	13	-	11	12	-	12	10	-	21	24	14
An app provided by the company to book multiple mobility solutions	Use	10	11	10	10	11	10	11	9	11	7	9	10	10
	Total (use + consider)	21	23	24	20	21	20	29	28	31	20	29	28	29
A card provided by the company to pay multiple mobility solution	Use	-	8	8	-	8	8	-	7	6	-	7	9	10
	Total (use + consider)	-	22	21	-	20	18	-	24	26	-	23	24	27

Change of definition

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

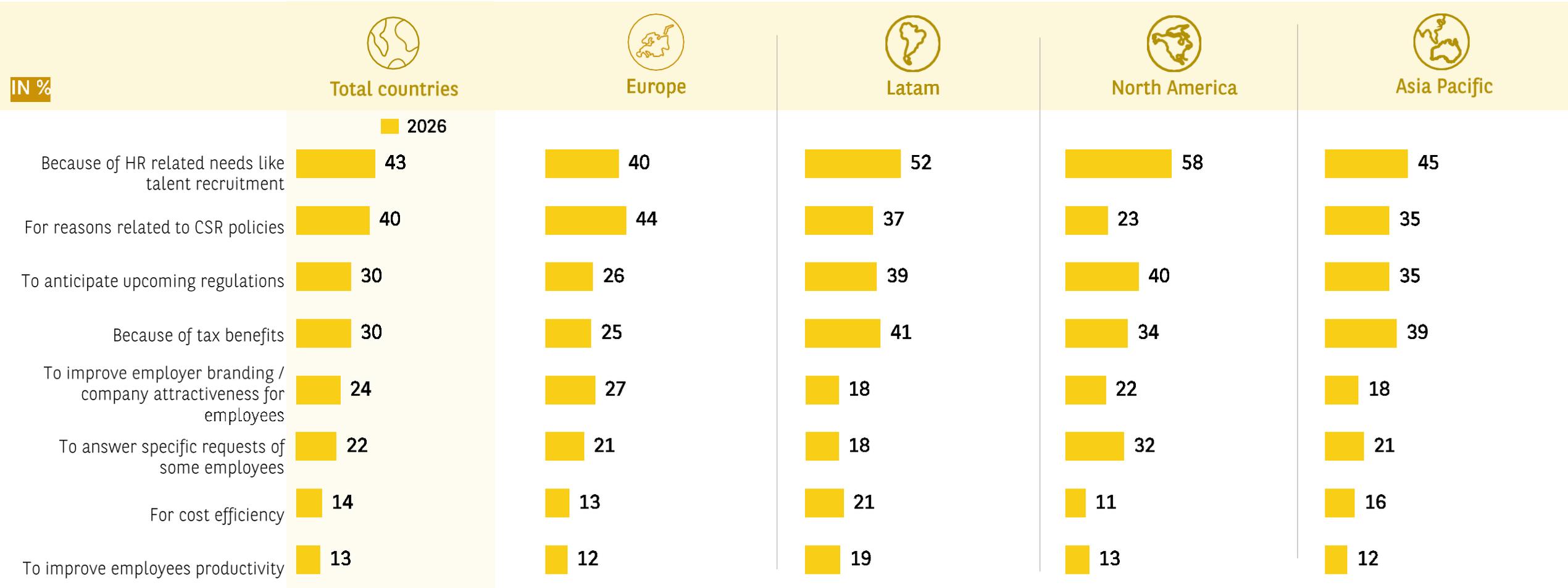
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

REASONS FOR IMPLEMENTING MOBILITY SOLUTIONS & POLICIES

HOW TO READ THE RESULTS ?

Overall in 2026, 43% of the companies declare that the main reason for introducing mobility solutions & policies is: Because of HR related needs like talent recruitment.



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

06

FUTURE CHALLENGES

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



While awareness of corporate decarbonization is growing, establishing specific targets remains limited

Overall, 15% of the companies have targeted decarbonization goals, and 26% are currently evaluating such goals, showing still some awareness of corporate decarbonization – with rather consistent results across regions or company sizes.

Employee mobility plays a noteworthy role in these efforts, with 21% of companies with decarbonization goals recognizing its significant impact, particularly in large corporations where this figure rises to 24%.

Mitigating the TCO and adapting to restrictive policies on ICE represent two major challenges in fleet management in the future

In Europe and LATAM, 31% and 43% of companies expect adapting to restrictive public policies on ICE to be their main future challenge.

In North America and in APAC, 45% and 40% of companies are focused on mitigating the increase of the TCO.

The following challenges are fleet electrification and the promotion of more responsible driving, although they seem to be less of a challenge in Latam and North America.

Fleet managers face significant challenges in fleet performance management

44% of fleet manager claim they would need help in terms of fleet performance management, and more specifically they would need:

- Automated vehicle performance monitoring and predictive maintenance (18%)
- An all-in-one fleet management software / platform (14%)
- Fuel consumption monitoring and optimization (13%)
- Cost control and financial oversight of fleet operations (11%)

They would also need help in logistics and fleet operations management (27%):

- Route and delivery optimization (15%)
- Fleet allocation, operations coordination and optimization (14%)

17% would also need vehicles real-time tracking and monitoring.

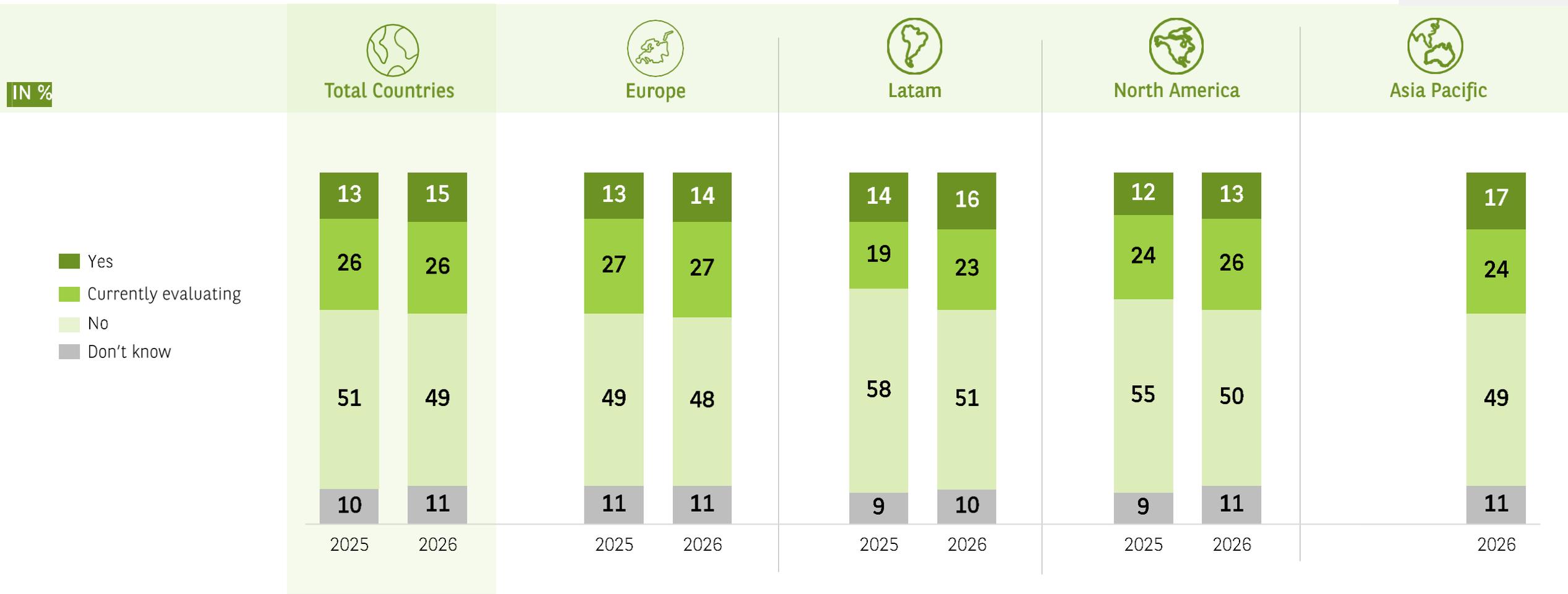


DECARBONIZATION GOALS

HOW TO READ THE RESULTS ?

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

Change of question

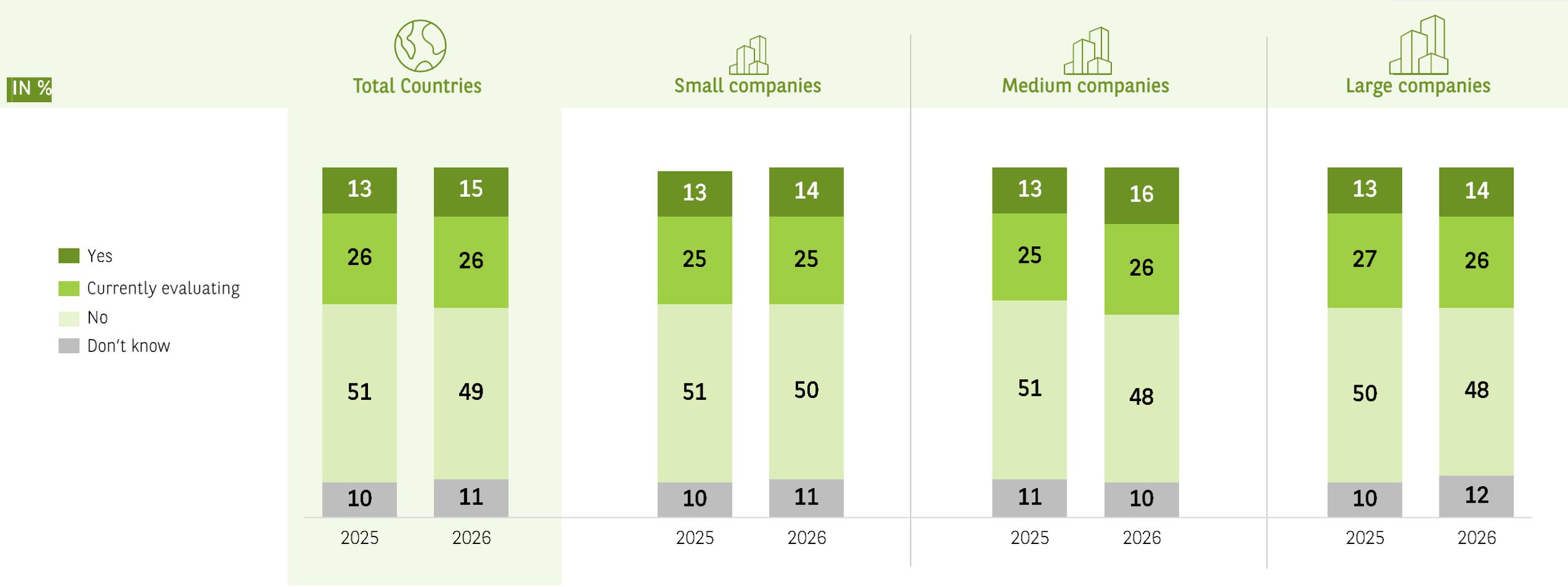


A56. Does your organization have targeted decarbonization goals? It is not limited to fleet, for instance "Net 0"
Basis: companies with corporate vehicles = 100%

HOW TO READ THE RESULTS ?

Overall 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%

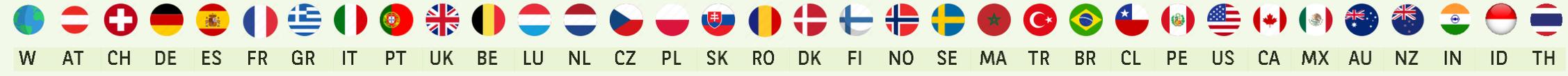
DECARBONIZATION GOALS

HOW TO READ THE RESULTS ?

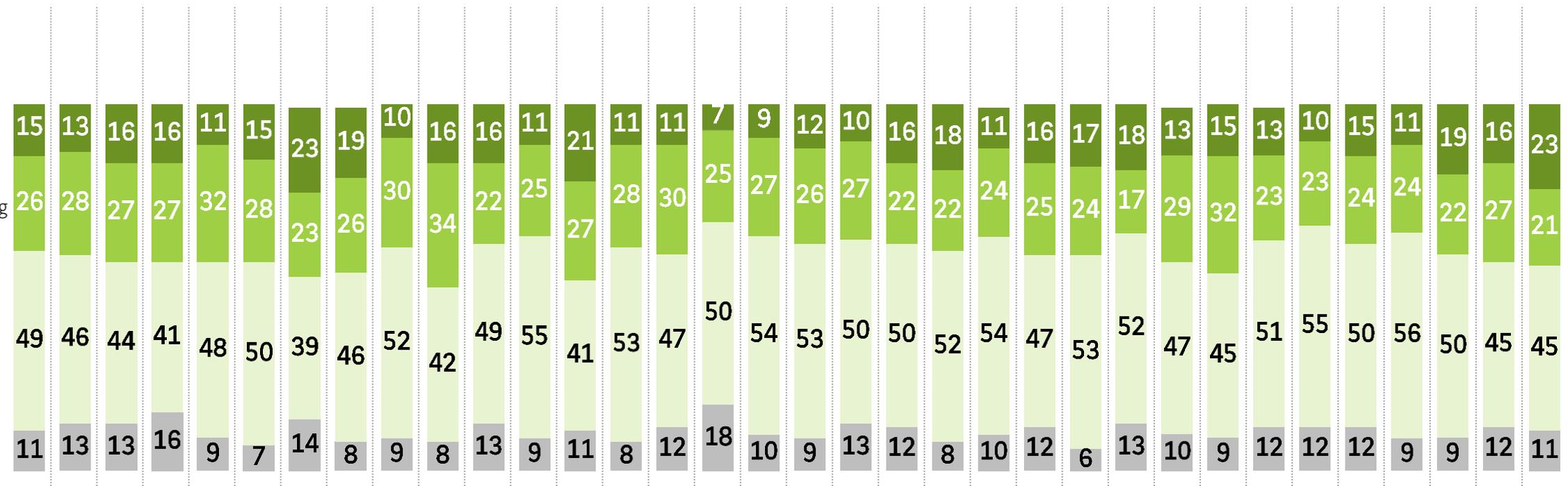
Overall in 2026, 15% of the companies have targeted decarbonization goals.

Change of question

IN %



■ Yes
■ Currently evaluating
■ No
■ Don't know

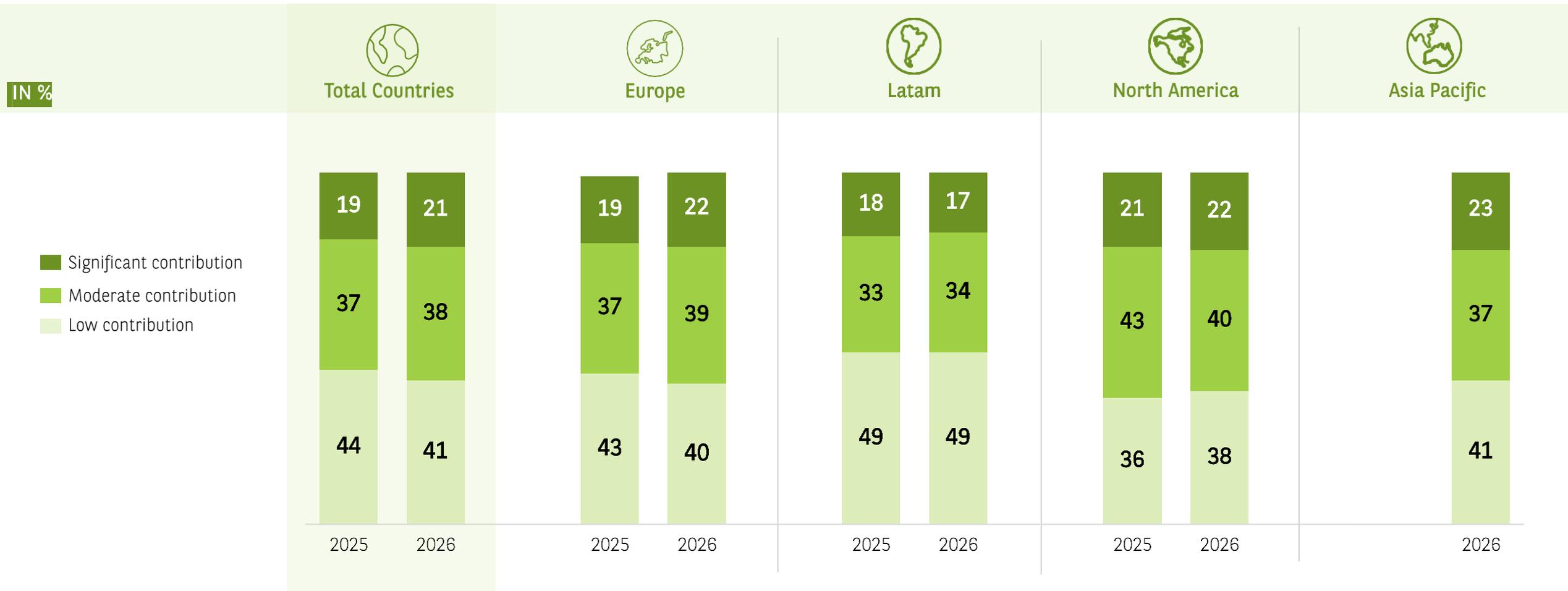


A56. Does your organization have targeted decarbonization goals? It is not limited to fleet, for instance "Net 0"
 Basis: companies with corporate vehicles = 100%

IMPORTANCE OF EMPLOYEE'S MOBILITY TO DECARBONIZATION GOALS

HOW TO READ THE RESULTS ?

Overall in 2026, 21% of the companies that have targeted decarbonization goals rate the contribution of employee's mobility in these decarbonization targets as significant contribution.



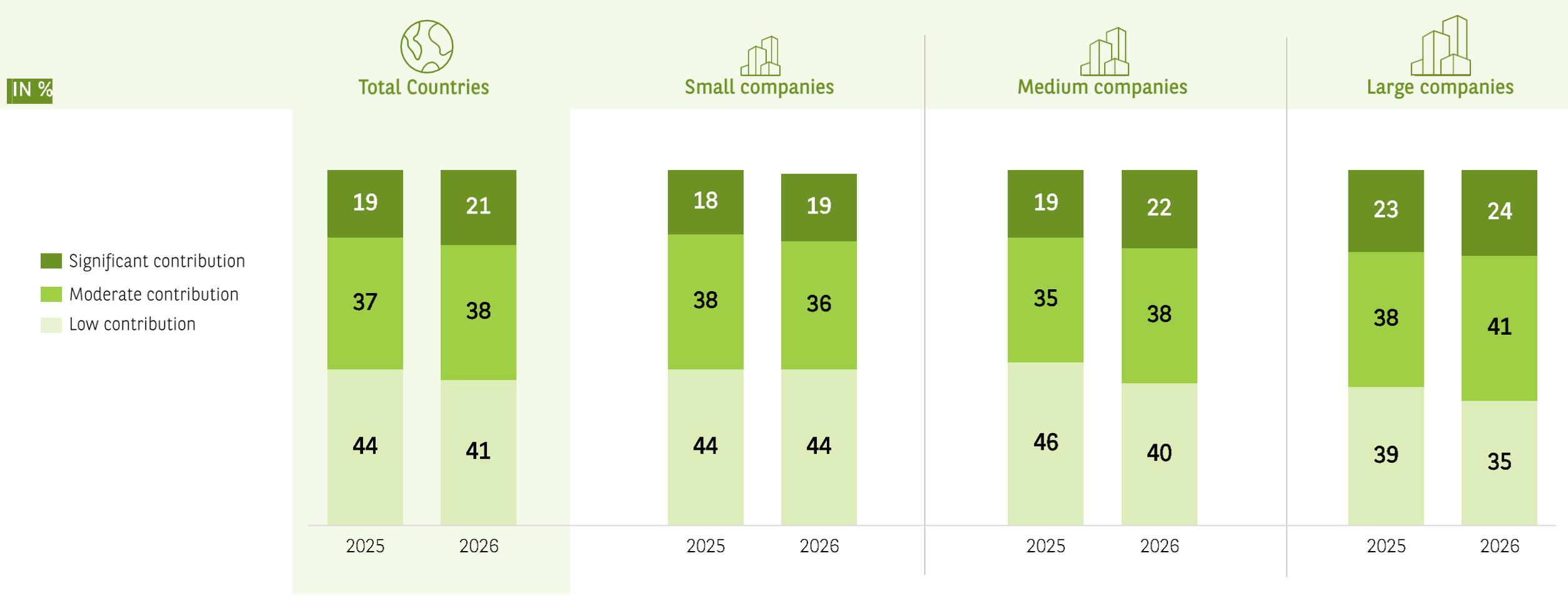
A57. How would you rate the contribution of employees mobility in these decarbonization targets?

Basis: companies that have targeted decarbonization goals

IMPORTANCE OF EMPLOYEE'S MOBILITY TO DECARBONIZATION GOALS

HOW TO READ THE RESULTS ?

Overall in 2026, 21% of the companies that have targeted decarbonization goals rate the contribution of employee's mobility in these decarbonization targets as significant contribution.

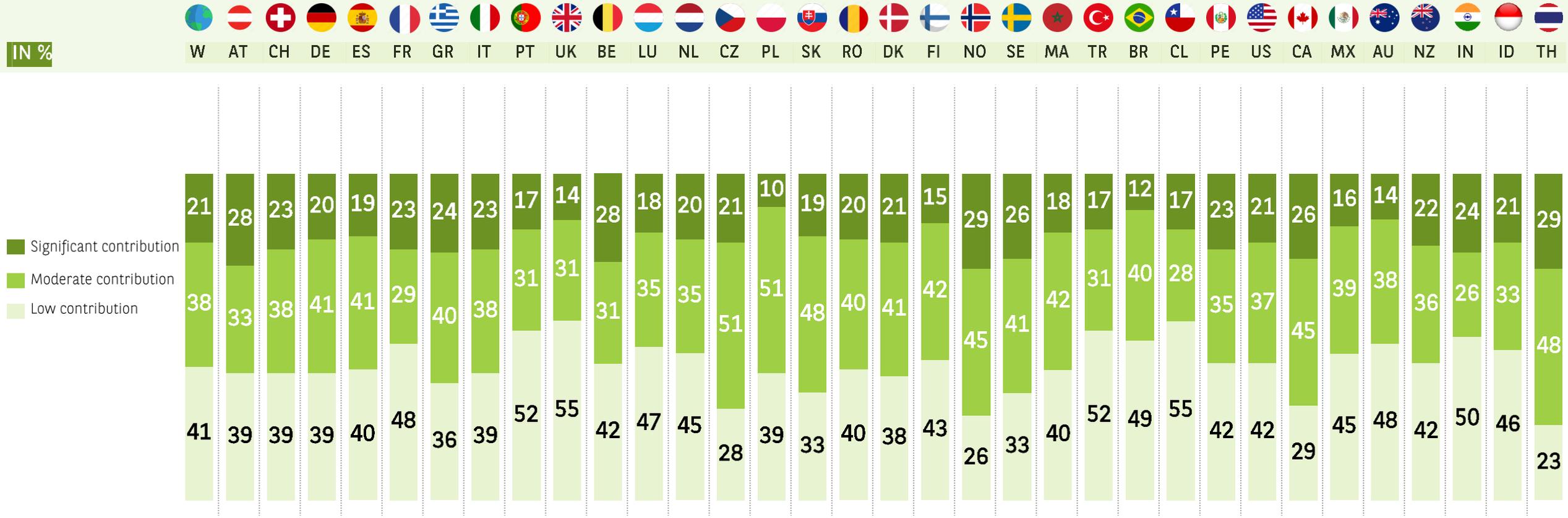


A57. How would you rate the contribution of employees mobility in these decarbonization targets?
 Basis: companies that have targeted decarbonization goals

IMPORTANCE OF EMPLOYEE'S MOBILITY TO DECARBONIZATION GOALS

HOW TO READ THE RESULTS ?

Overall in 2026, 21% of the companies that have targeted decarbonization goals rate the contribution of employee's mobility in these decarbonization targets as significant contribution.

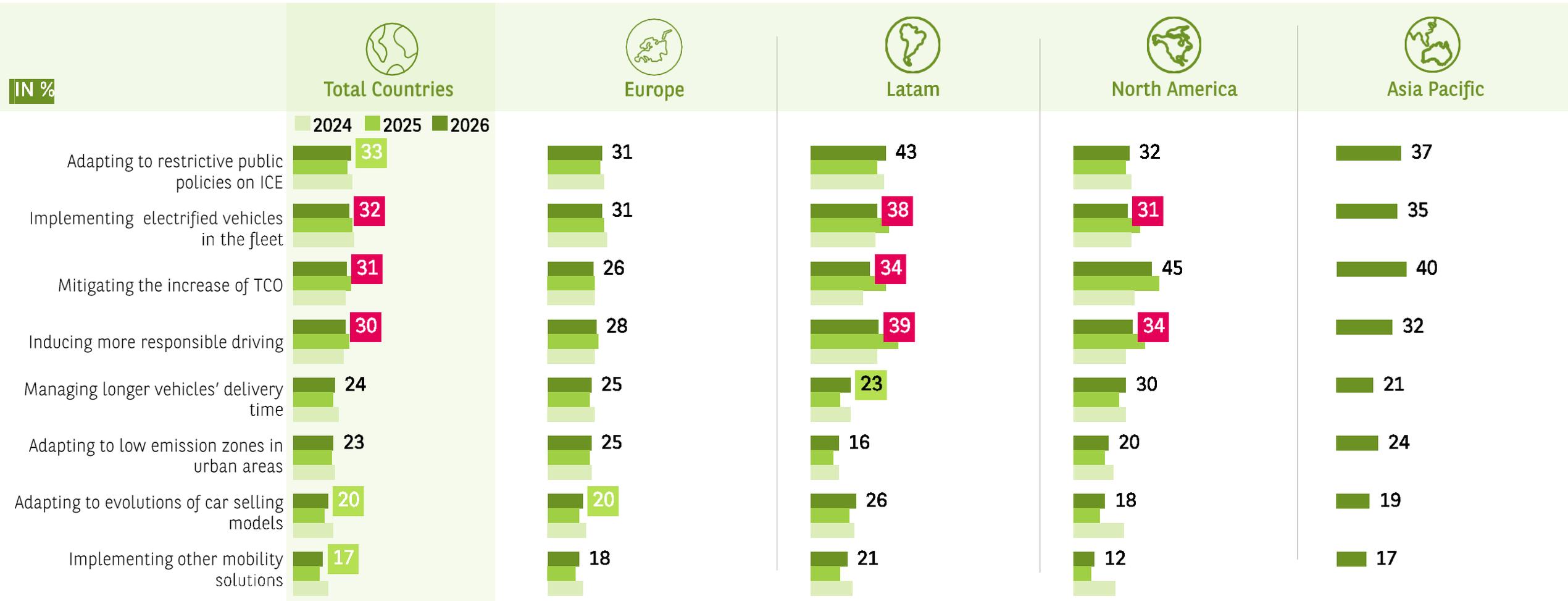


A57. How would you rate the contribution of employees' mobility in these decarbonization targets?
Basis: companies that have targeted decarbonization goals

THREE MAIN CHALLENGES FOR FLEET MANAGEMENT IN THE N3Y

HOW TO READ THE RESULTS ?

Overall in 2026, 33% of the companies declare that Adapting to restrictive public policies on ICE 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

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.

OPEN-ENDED QUESTION: WHAT WOULD HELP FLEET MANAGERS?

HOW TO READ THE RESULTS ?

Overall in 2026, 18% of the respondents declare that Automated vehicle performance monitoring and predictive maintenance would help them as a fleet manager.

New question

IN %	Total Countries	Europe	Latam	North America	Asia Pacific
Fleet performance management	44%	43%	46%	47%	47%
Automated vehicle performance monitoring and predictive maintenance	18%	17%	17%	21%	21%
An all-in-one fleet management software / platform	14%	14%	13%	15%	15%
Fuel consumption monitoring and optimization	13%	13%	15%	13%	13%
Cost control and financial oversight of fleet operations	11%	11%	14%	11%	10%
Logistics and fleet operations management	27%	26%	30%	29%	30%
Route and delivery optimization	15%	14%	17%	18%	16%
Fleet allocation, operations coordination and optimization	14%	13%	15%	15%	16%
Intelligent cargo and load optimization	2%	2%	2%	2%	2%
Driver and safety	21%	21%	18%	23%	23%
Vehicles real-time tracking and monitoring	17%	17%	15%	19%	18%
Driver management and safety standards implementation	3%	3%	2%	3%	4%
Fleet security and protection systems	2%	2%	3%	2%	2%
Administrative & Compliance	9%	9%	11%	10%	9%
Centralizing and digitizing fleet documentation	7%	7%	9%	8%	7%
Proactive compliance deadline management	2%	2%	3%	2%	2%
Environment & Sustainability	5%	5%	6%	6%	6%
Support for the adoption and management of electric vehicles	2%	2%	2%	3%	2%
Tools and practices for a sustainable fleet management	2%	2%	3%	2%	2%
Vehicle emissions monitoring	2%	2%	2%	2%	2%
Others	22%	23%	20%	18%	18%
Other	20%	21%	19%	16%	17%
Enhanced refrigerated vehicles	2%	2%	2%	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%



Total Countries

VERBATIM FOR TOP 3 TOPICS

Automated vehicle performance monitoring and predictive maintenance

18%



"Integrating advanced monitoring systems for predictive vehicle maintenance, which can detect anomalies early and reduce the risk of failures." (Romania)

"A system that monitors the condition of vehicles and sends notifications about maintenance deadlines to avoid sudden failures." (Finland)

Vehicles real-time tracking and monitoring

17%



"A system is needed to track vehicles and monitor materials transported along the way." (Czech Republic)

"What would really help is having a real-time tracking system for your shipments so that we can be sure of on-time delivery." (Thailand)

"An application that tracks vehicles and technicians in real time." (Chile)

Route and delivery optimization

15%



"Using digital tools to plan routes and deliveries, avoiding overlaps and delays during the day." (Australia)

"I could use AI-powered software to optimize routes and minimize travel time." (Italy)

"Having a system that tracks vehicles while they are on the road would help me to better coordinate orders and deliveries." (New Zealand)

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 ?

Overall in 2026, 18% 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%
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%
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%
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%
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%
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%
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 ?

Overall in 2026, 18% 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%
Fuel consumption monitoring and optimization	13%	11%	12%	14%	14%	18%	11%	15%	12%	12%	17%	12%	15%	12%
Cost control and financial oversight of fleet operations	11%	6%	12%	12%	15%	14%	10%	10%	12%	13%	11%	11%	9%	8%
Logistics and fleet operations management	27%	24%	24%	27%	29%	33%	30%	26%	32%	28%	34%	32%	24%	31%
Route and delivery optimization	15%	15%	13%	16%	14%	21%	17%	15%	21%	13%	15%	20%	12%	19%
Fleet allocation, operations coordination and optimization	14%	9%	13%	14%	15%	16%	13%	11%	19%	16%	20%	14%	11%	17%
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%

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 mean 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



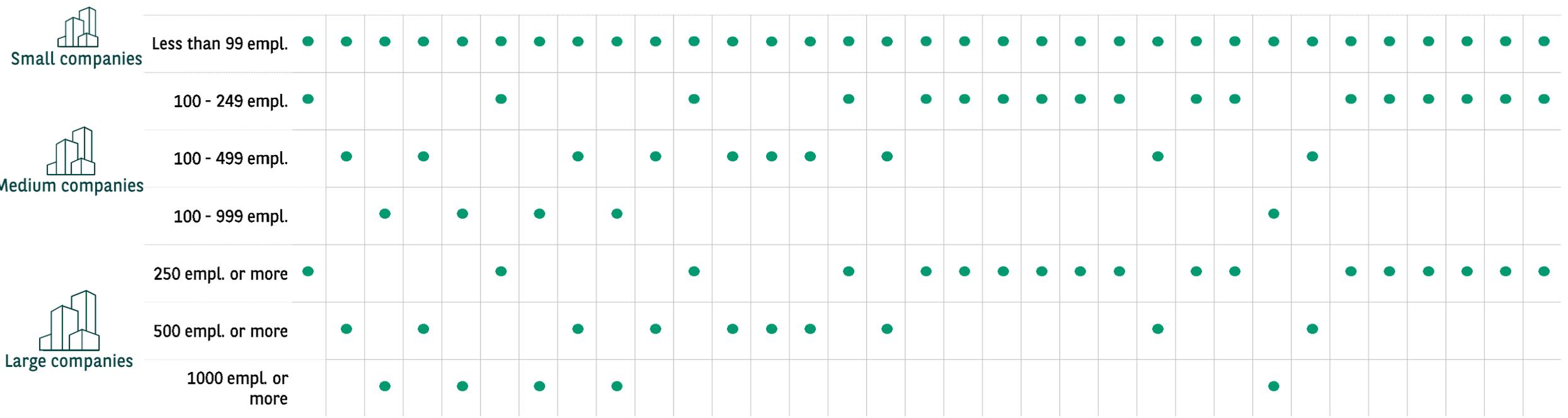
Charging policies

- **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



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