

# FLEET AND MOBILITY BAROMETER 2026

COUNTRY REPORT 

## **1** FLEET CHARACTERISTICS

---

## **2** FINANCING METHODS

---

## **3** ENERGY MIX

---

## **4** CONNECTED FLEETS

---

## **5** EMPLOYEE MOBILITY

---

## **6** FUTURE CHALLENGES

---



## RESEARCH APPROACH

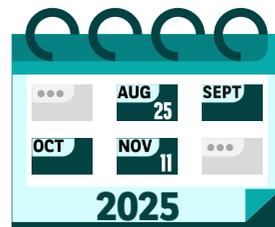


# 10,157

INTERVIEWS WITH  
CORPORATE FLEET  
DECISION MAKERS

20-MINUTE  
PHONE INTERVIEWS

FIELDWORK  
(ALL COUNTRIES)



READING NOTES ABOUT THE REPORT

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

## RESEARCH OBJECTIVES

1



What short term shifts  
are shaping the market?

---

2



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

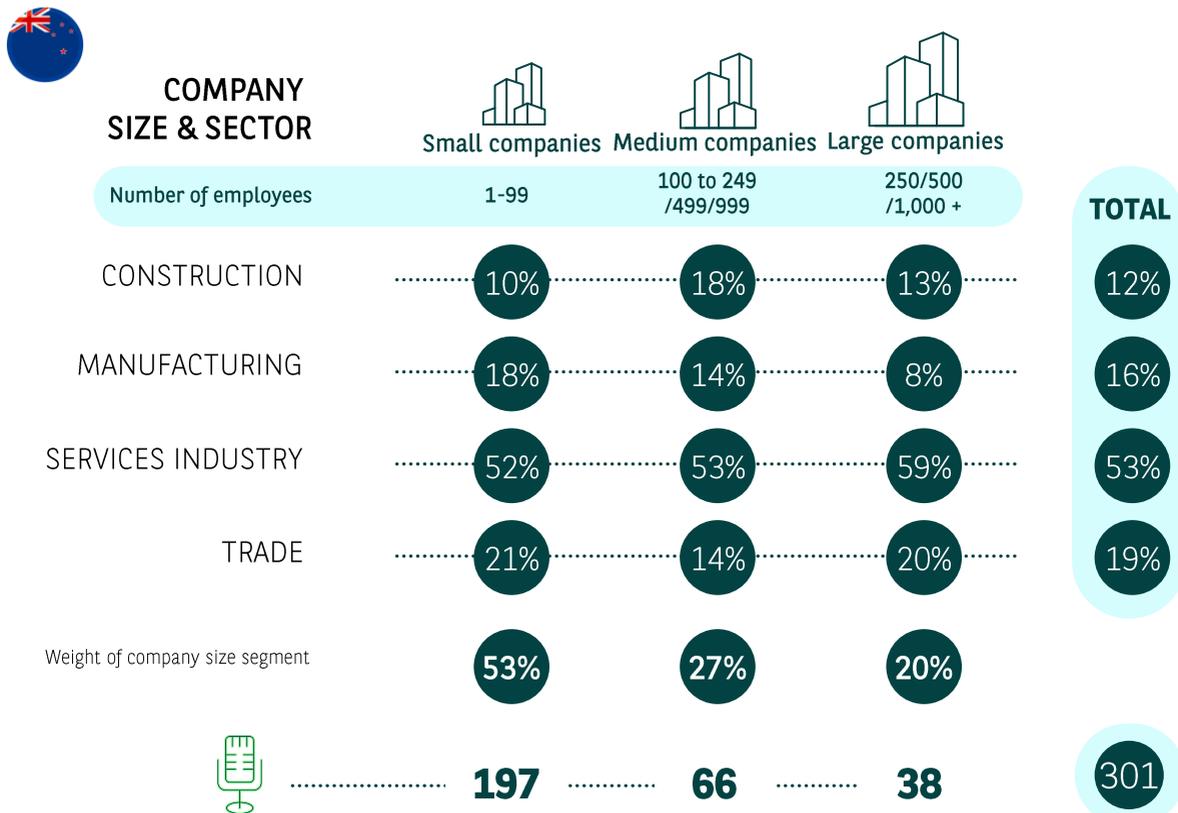
---

3



How do mobility solutions  
impact corporate mobility?

## QUOTAS ON COMPANY SIZE & INDUSTRY



## 33 COUNTRIES - 4 REGIONAL BENCHMARKS



Morocco and Turkey: compared with Europe benchmark



## MOST NEW ZEALAND COMPANIES MAINTAIN A POSITIVE FLEET OUTLOOK

**96%** anticipate their fleet will either remain stable or grow in the next 3 years (with 27% expecting growth)

**52%** include second-hand vehicles in their fleets and 45% are considering it. Overall, the share of companies including or considering second-hand vehicles has increased since 2025, rising to 97% from 90%.



## OPERATIONAL LEASING HOLDS GROWTH POTENTIAL

**22%** intend to introduce or increase their use of full-service leasing to finance their fleet

**18%** quote full-service leasing as the main financing method for their fleet, lower than the APAC average of 27%



## STABLE AND SIGNIFICANT FLEET ELECTRIFICATION IN NEW ZEALAND

**56%** already use electrified passenger cars, with medium-sized companies leading at 64%, compared to small companies at 53% and large companies at 55%. An additional 24% are considering it

**49%** consider the lack of charging infrastructure as the main barrier to BEV adoption for passenger cars. But 87% have or plan to implement a charging strategy at the company premises, and 66% are supporting public charging



## STABLE TELEMATICS ADOPTION WITH PROMISING POTENTIAL

**27%** have adopted telematics, which is stable and lower than APAC average of 38%

Only **16%** of them use telematics data. However, the potential remains significant, with **47%** of companies considering leveraging this data.



## MOBILITY POLICIES REMAIN A CORPORATE PRIORITY, DRIVEN BY HR CONSIDERATIONS

**40%** prioritize personal vehicle reimbursement, 38% are using or considering short- or mid-term vehicle rentals and 34% prioritize car or cash allowance

**34%** of companies are developing corporate mobility programs to meet specific employee requests. Another 33% cite HR needs as motivating factors



## DECARBONIZATION AND INNOVATION LEAD FLEET MANAGEMENT PRIORITIES

**11%** have set targeted decarbonization goals to date, and 24% are currently evaluating them. Mitigating the increase in TCO and fleet electrification are top priorities

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

# 01

## FLEET CHARACTERISTICS

What are the key characteristics of fleets?



## Most companies in New Zealand are confident about their fleet prospects

96% of companies in New Zealand expect their fleet size to remain stable or increase over the next three year, with 22% expecting growth, a trend consistent across company sizes and vehicle types, and aligned with the APAC average.

## Second-hand vehicle adoption and consideration are increasing in New Zealand

In 2026, 52% of companies in New Zealand have incorporated second-hand vehicles into their fleets, aligning with the APAC average of 48%. This implementation is more significant for passenger car fleets (43%) compared to light commercial vehicle (LCV) fleets (16%).

Additionally, 45% are considering adding second-hand vehicles to their fleets.

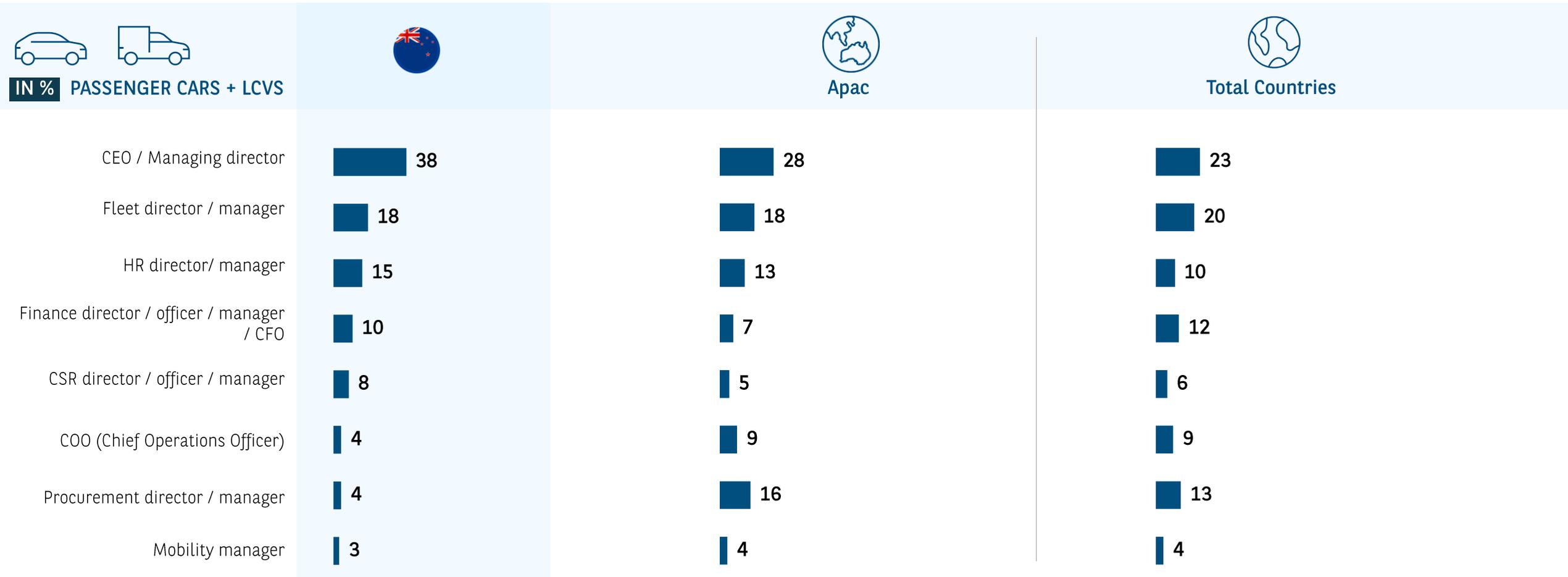
Overall, the share of companies including or considering second-hand vehicles has increased since 2025, rising to 97% from 90%.

## Nearly one in four New Zealand companies outsources fleet management

In 2026, 23% of companies outsource these services, a stable figure.

## HOW TO READ THE RESULTS ?

In New Zealand, 38% of the respondents are CEO / Managing director.



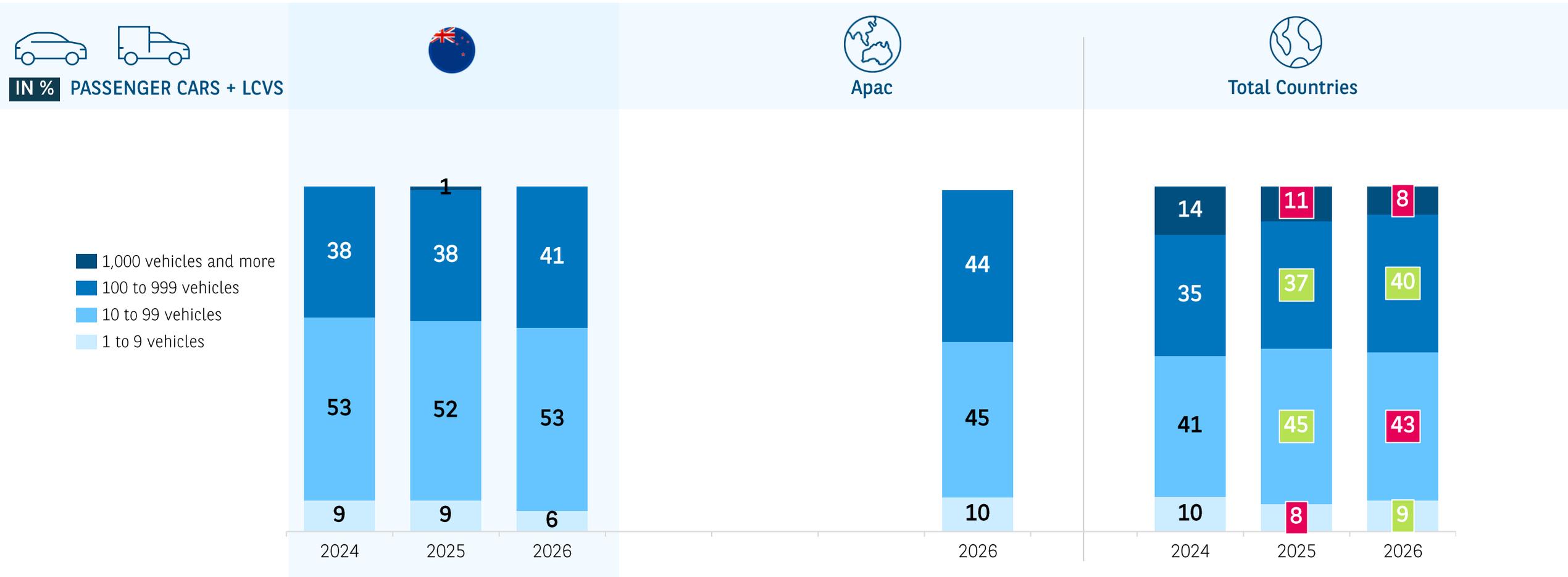
SC5TER. Could you please specify your exact position in the company?

Basis: companies with corporate vehicles = 100%

# NUMBER OF VEHICLES IN FLEETS

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, vehicle fleets are composed of: 6% with 1-9 vehicles, 53% with 10-99 vehicles, 41% with 100-999 vehicles and 0% with 1,000 or more.



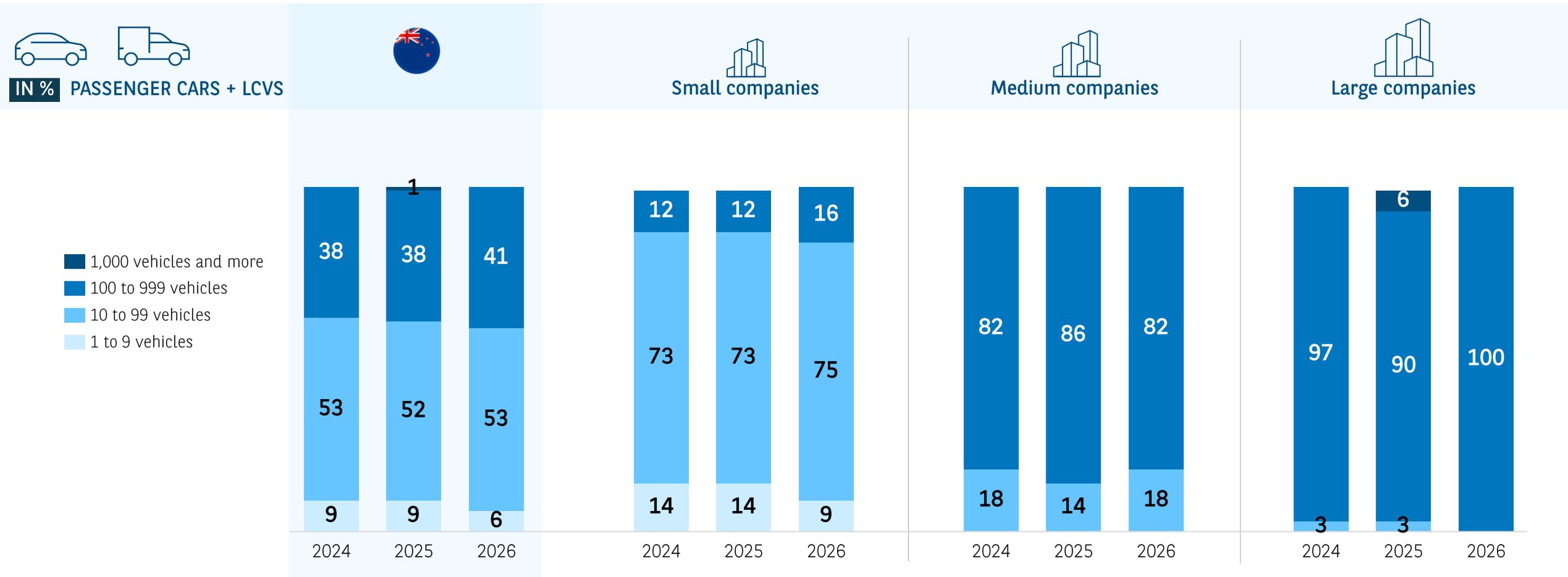
A5/ZDA5. Can you please tell us the total number of vehicles of less than 3.5 tons in your fleet?  
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

# NUMBER OF VEHICLES IN FLEETS

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, vehicle fleets are composed of: 6% with 1-9 vehicles, 53% with 10-99 vehicles, 41% with 100-999 vehicles and 0% with 1,000 or more.



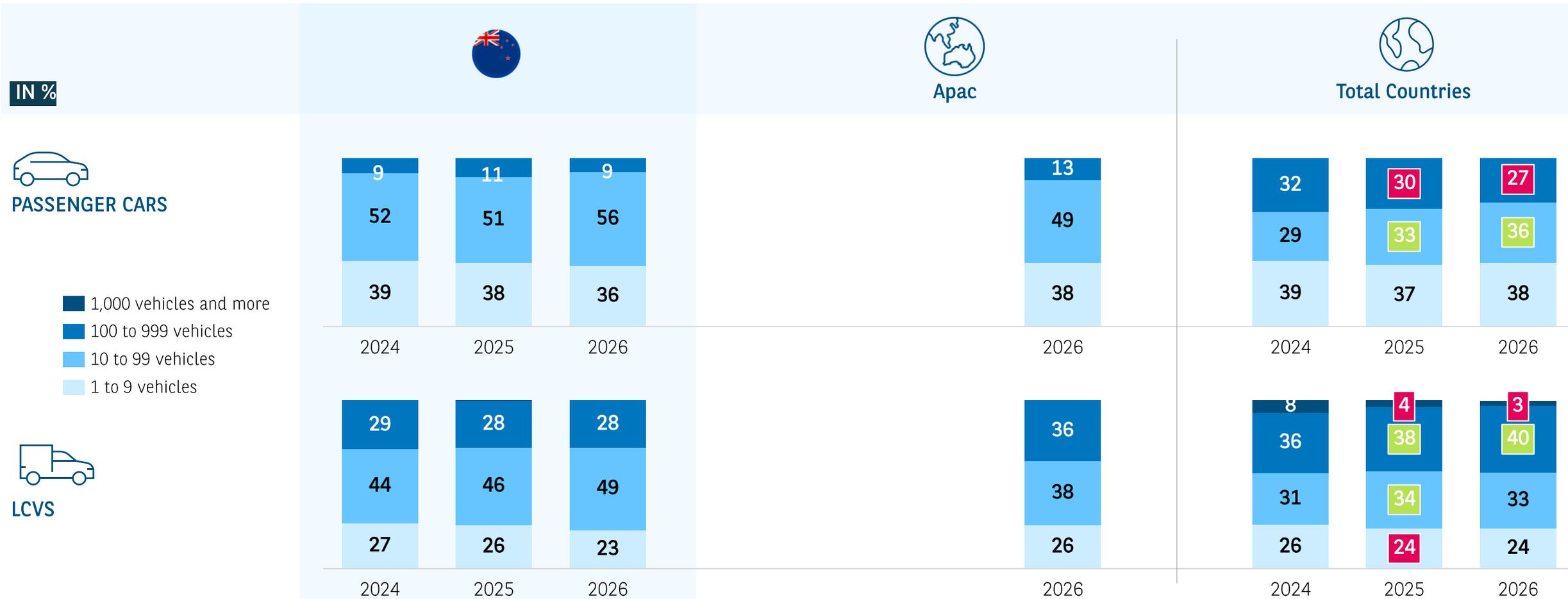
A5/ZDA5. Can you please tell us the total number of vehicles of less than 3.5 tons in your fleet?  
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

# NUMBER OF PASSENGER CARS AND LCVS IN FLEETS

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, passenger car fleets are composed of: 36% with 1-9 vehicles, 56% with 10-99 vehicles, 9% with 100-999 vehicles and 0% with 1000 or more. And LCV fleets are composed of: 23% with 1-9 vehicles, 49% with 10-99 vehicles, 28% with 100-999 vehicles and 0% with 1,000 or more.



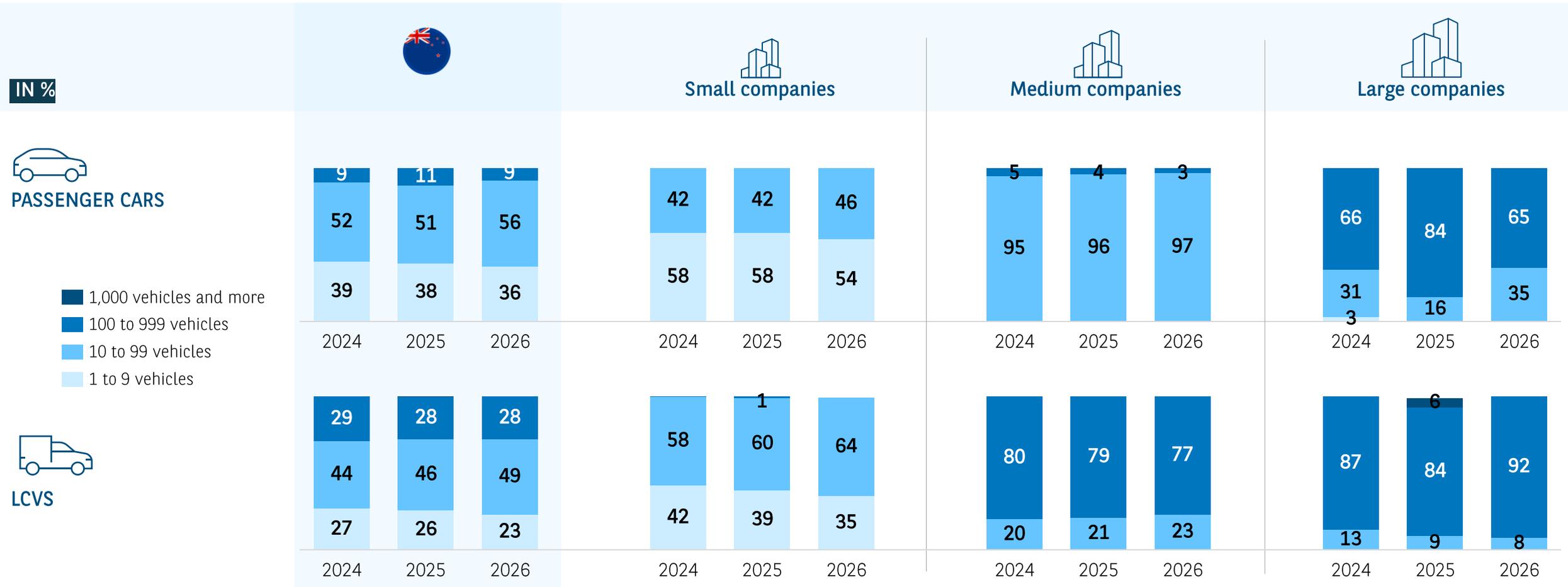
A5F. Can you please tell us the total number of cars and then the number of LCV's or vans in your fleet?  
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

# NUMBER OF PASSENGER CARS AND LCVS IN FLEETS

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, passenger car fleets are composed of: 36% with 1-9 vehicles, 56% with 10-99 vehicles, 9% with 100-999 vehicles and 0% with 1000 or more. And LCV fleets are composed of: 23% with 1-9 vehicles, 49% with 10-99 vehicles, 28% with 100-999 vehicles and 0% with 1,000 or more.



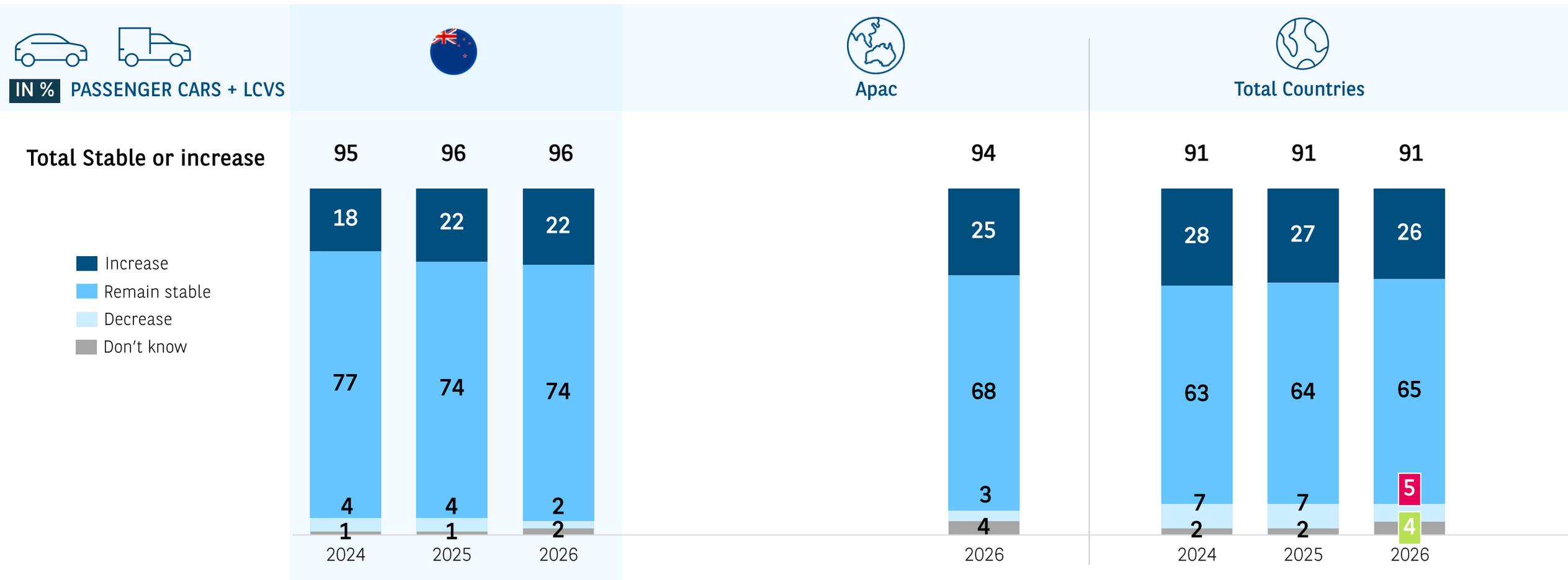
A5F. Can you please tell us the total number of cars and then the number of LCV's or vans in your fleet?  
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

# FLEET GROWTH POTENTIAL

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 96% of the companies expect their fleet to remain stable or to increase in the next 3 years.



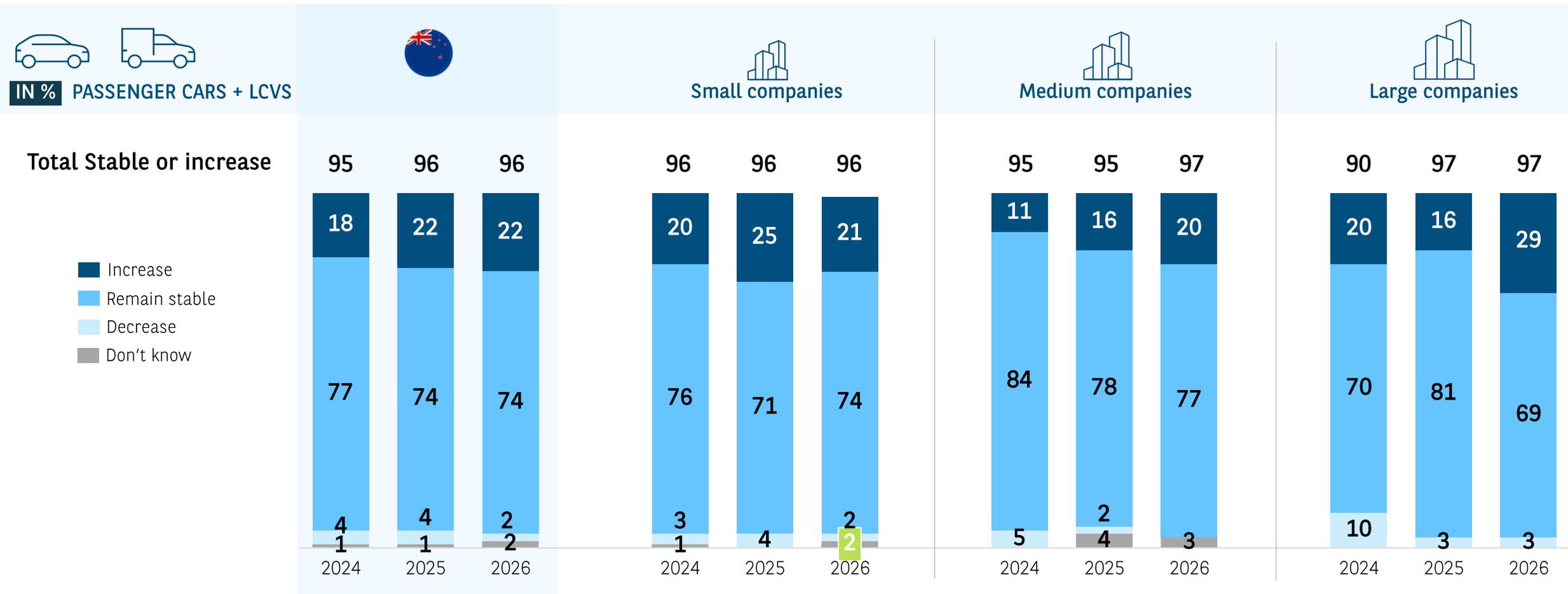
A8. In the next three years, do you think that the total number of vehicles in your company fleet will increase, decrease or remain the same?  
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

# FLEET GROWTH POTENTIAL

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 96% of the companies expect their fleet to remain stable or to increase in the next 3 years.



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

X% Significantly higher / lower vs. previous wave

# FLEET GROWTH POTENTIAL

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 96% of the companies expect their fleet to remain stable or to increase in the next 3 years.

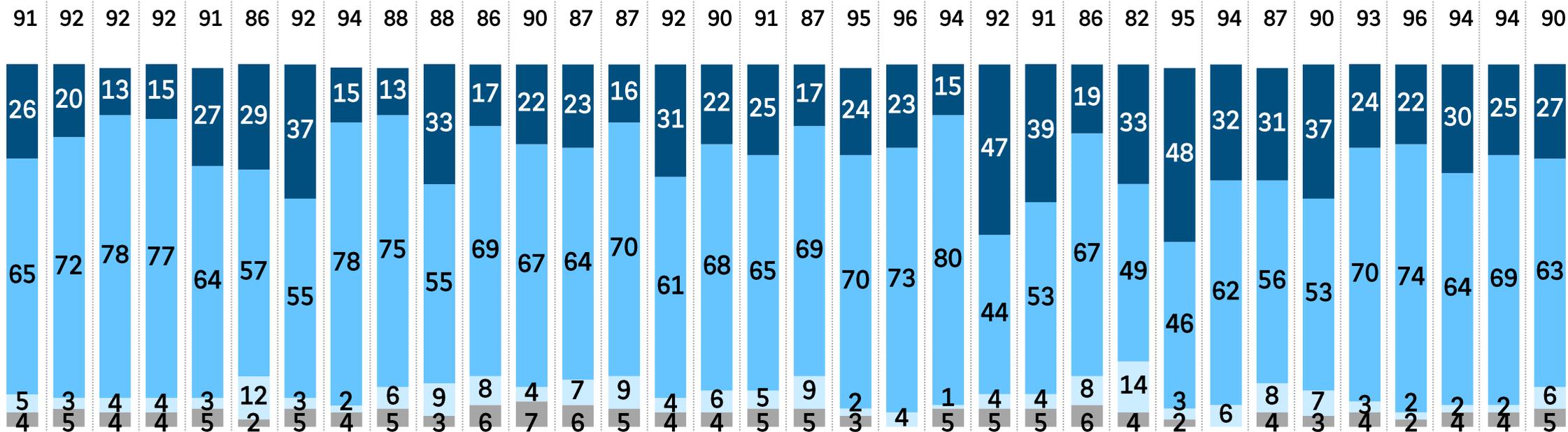


IN % PC + LCVS

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

Total Stable or increase

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



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

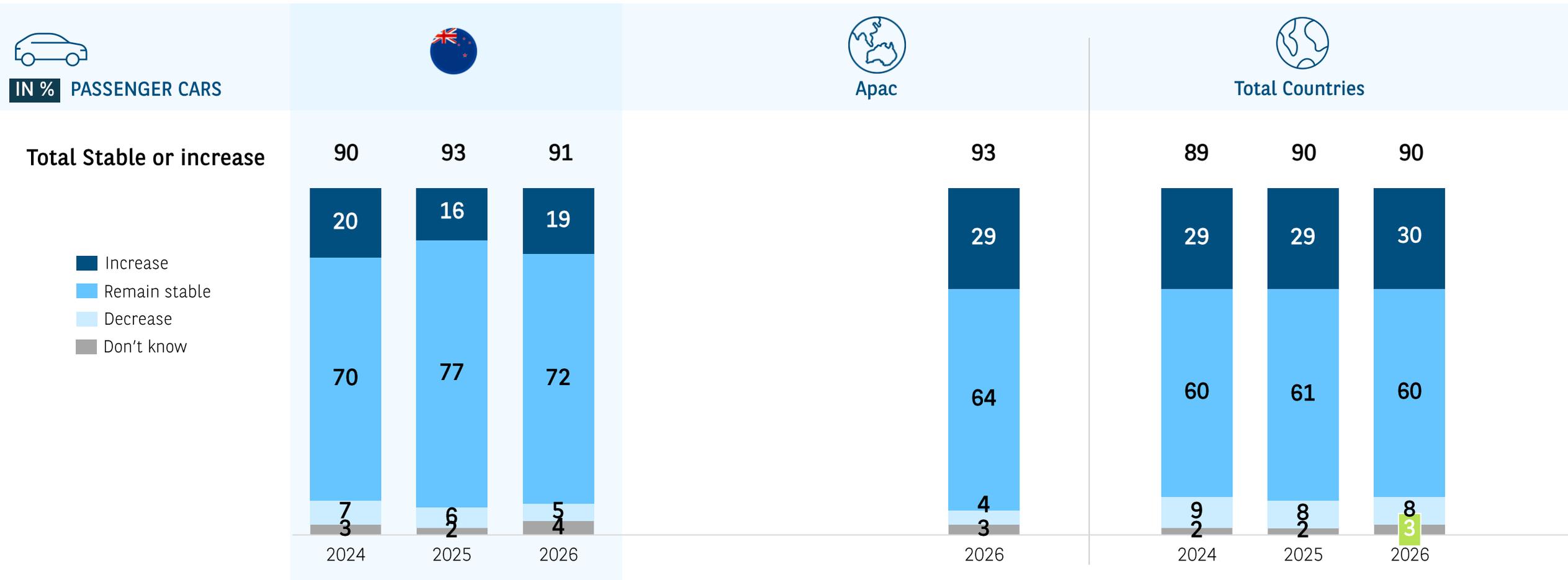
Basis: companies with corporate vehicles = 100%



# PASSENGER CAR FLEET GROWTH POTENTIAL

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 91% of the companies expect their passenger car fleet to remain stable or to increase in the next 3 years.



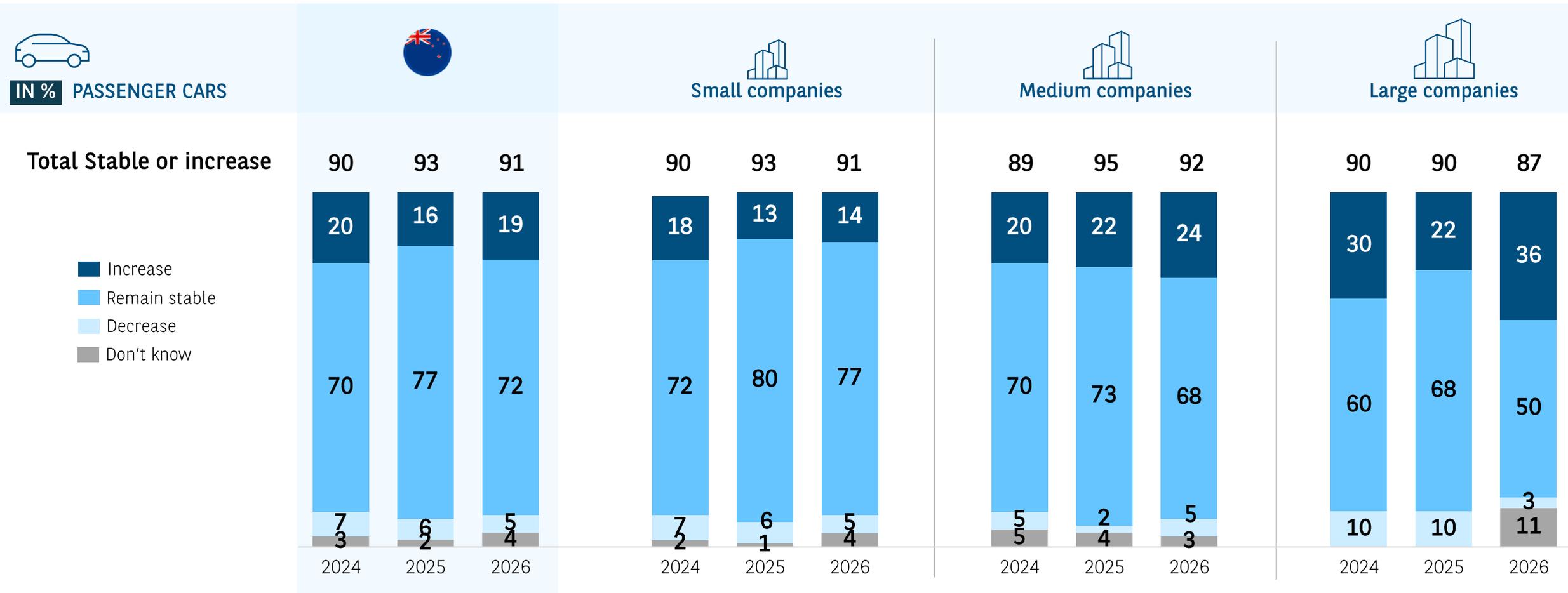
A9. In the next three years, do you think that the total number of your passenger cars will...?  
Basis: companies with passenger cars

X% Significantly higher / lower vs. previous wave

# PASSENGER CAR FLEET GROWTH POTENTIAL

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 91% of the companies expect their passenger car fleet to remain stable or to increase in the next 3 years.



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

X% Significantly higher / lower vs. previous wave

# PASSENGER CAR FLEET GROWTH POTENTIAL

## HOW TO READ THE RESULTS ?

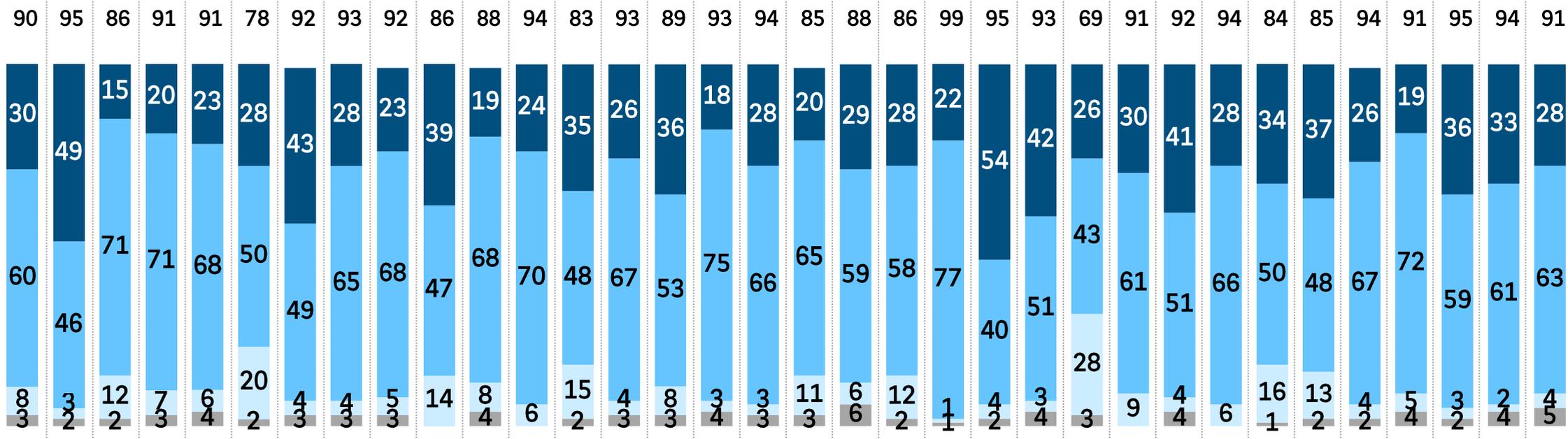
In New Zealand in 2026, 91% of the companies expect their passenger car fleet to remain stable or to increase in the next 3 years.



IN % PC



Total Stable or increase



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

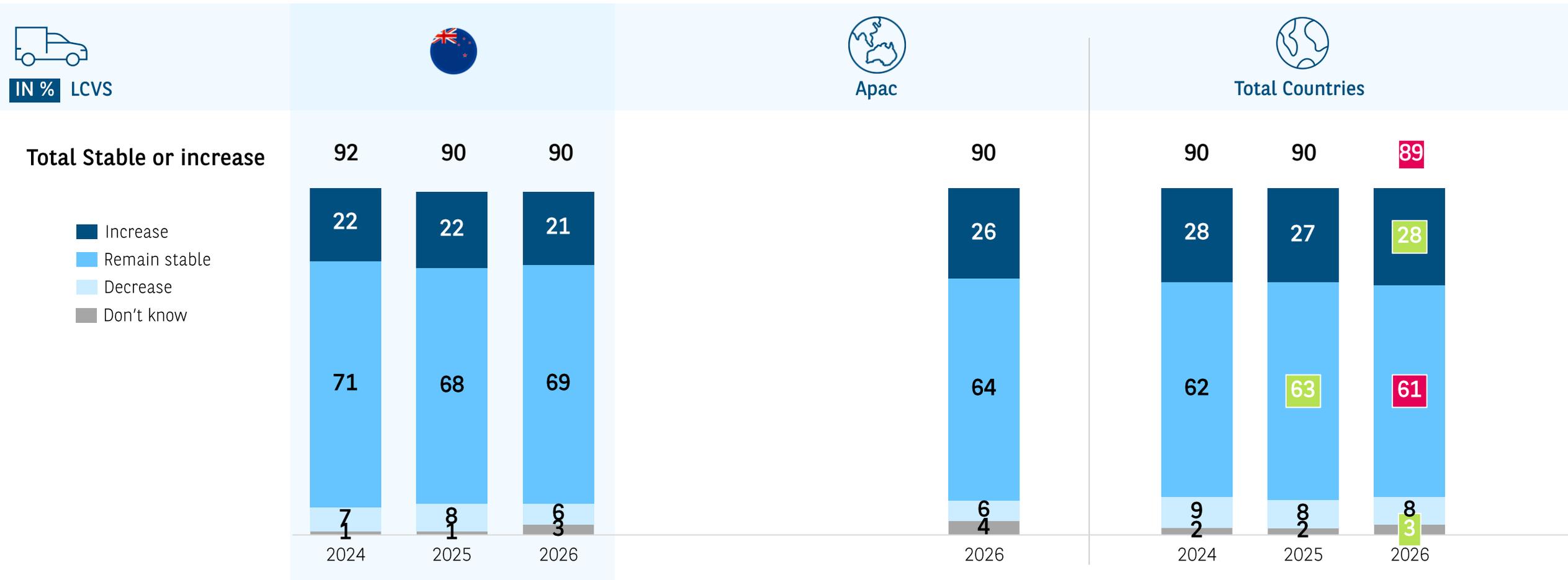
Basis: companies with passenger cars



# LCV FLEET GROWTH POTENTIAL

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 90% of the companies expect their LCV fleet to remain stable or to increase in the next 3 years.



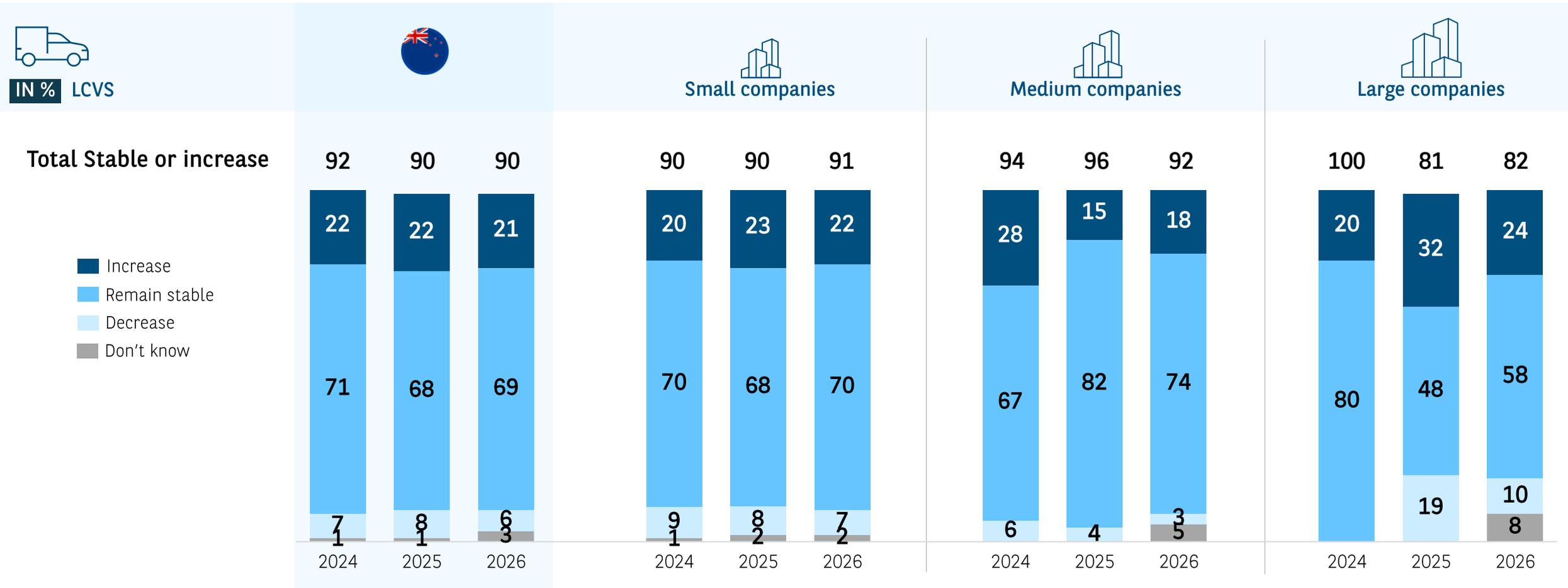
A10. In the next three years, do you think that the total number of your light commercial vehicles or vans will...?  
Basis: companies with LCVs

X% Significantly higher / lower vs. previous wave

# LCV FLEET GROWTH POTENTIAL

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 90% of the companies expect their LCV fleet to remain stable or to increase in the next 3 years.



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

X% Significantly higher/lower vs. previous wave

# LCV FLEET GROWTH POTENTIAL

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 90% of the companies expect their LCV fleet to remain stable or to increase in the next 3 years.

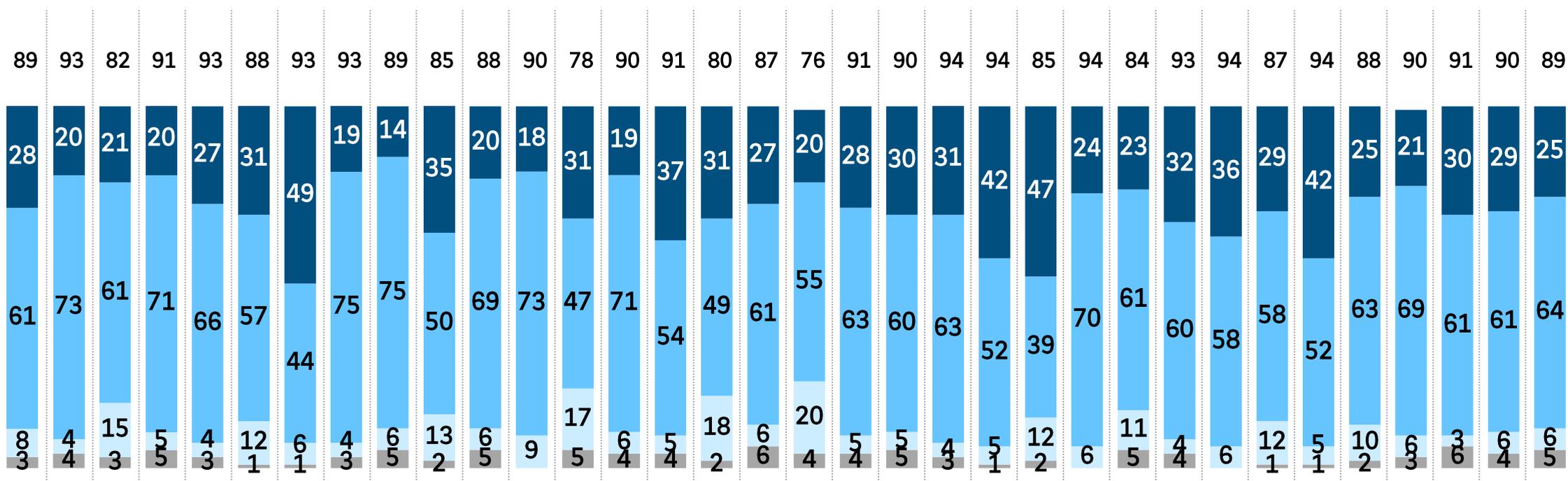


IN % LCVS



Total Stable or increase

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



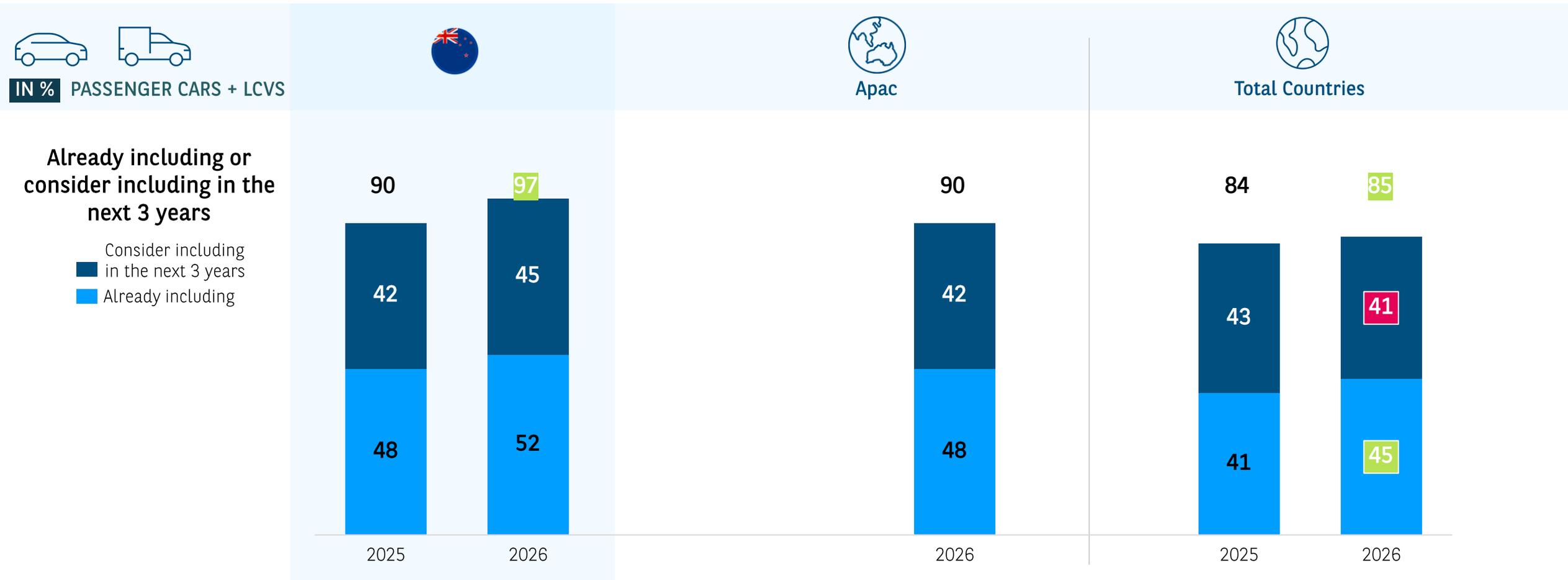
A10. In the next three years, do you think that the total number of your light commercial vehicles or vans will...?  
Basis: companies with LCVs



# USED / SECOND-HAND VEHICLES POSSESSION

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 97% of the companies are already including vehicles that were not new when acquired or are considering doing so in the next 3 years.



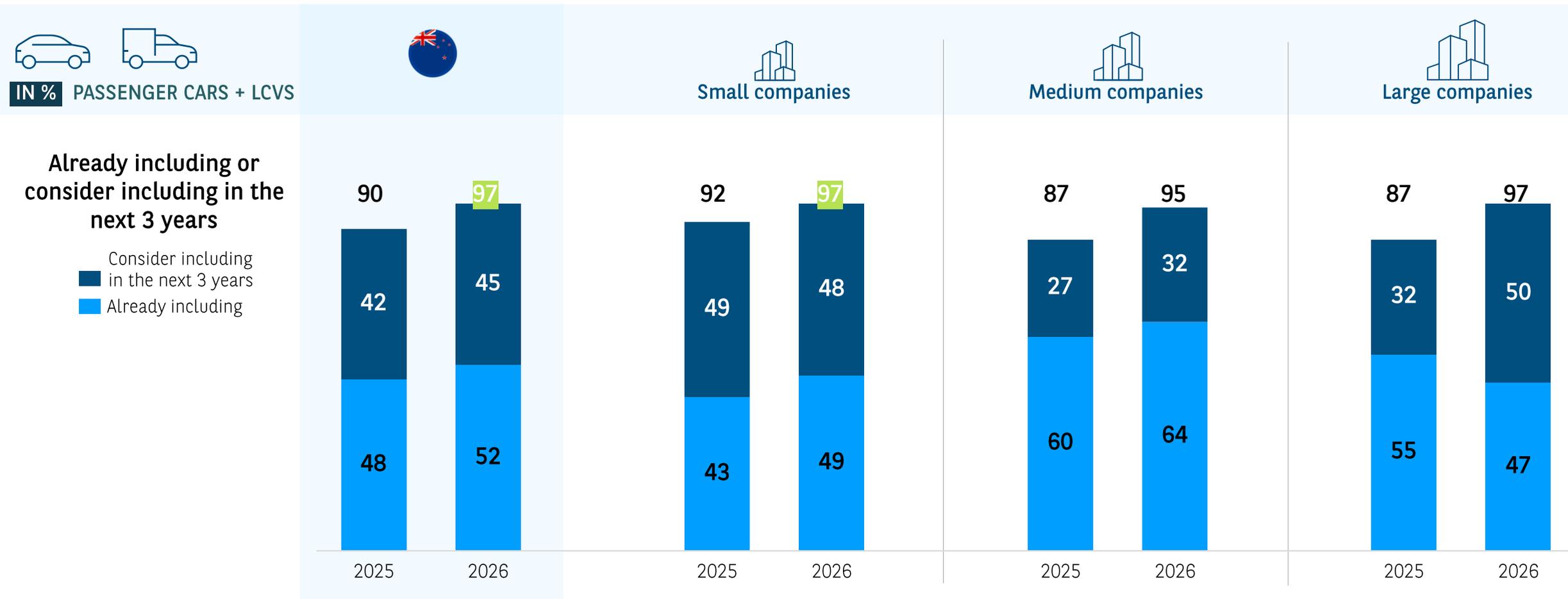
A14. Does your fleet include vehicles that were not new when you acquired them, or do you consider including some in the next 3 years?  
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

# USED / SECOND-HAND VEHICLES POSSESSION

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 97% of the companies are already including vehicles that were not new when acquired or are considering doing so in the next 3 years.



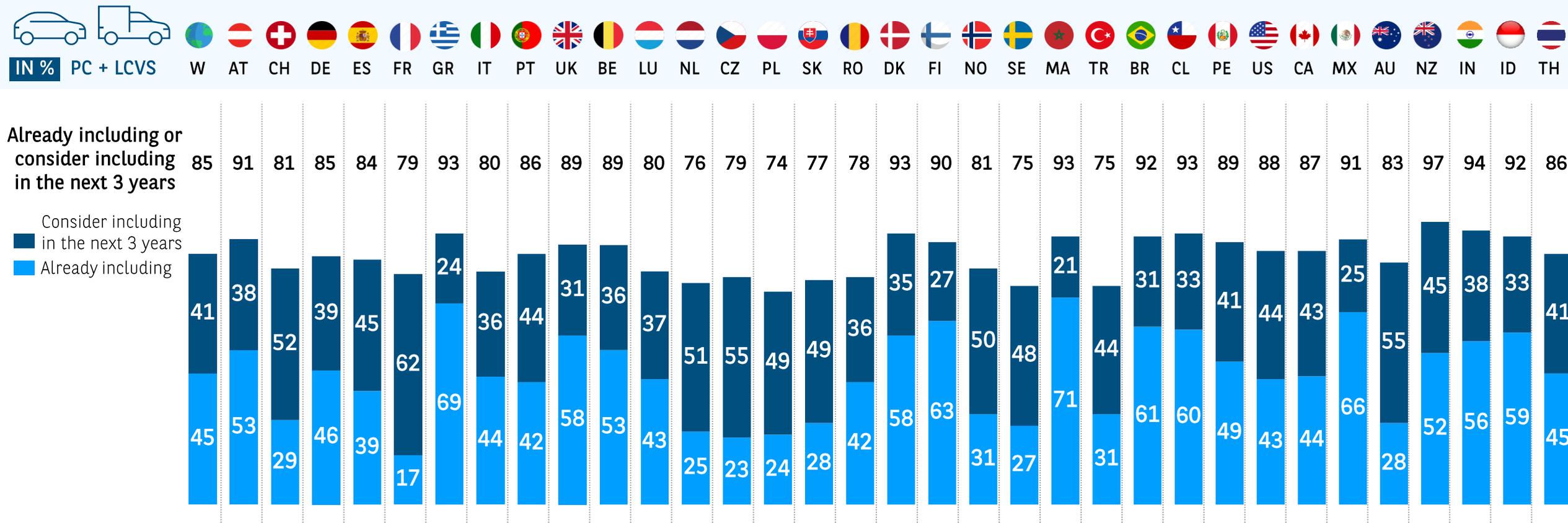
A14. Does your fleet include vehicles that were not new when you acquired them, or do you consider including some in the next 3 years?  
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

# USED / SECOND-HAND VEHICLES POSSESSION

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 97% 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%



# USED / SECOND-HAND VEHICLES POSSESSION

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 79% of the companies are already including or are considering including passenger cars that were not new when acquired. 70% of the companies are already including or are considering including LCVs that were not new when acquired.



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

X% Significantly higher / lower vs. previous wave

# USED / SECOND-HAND VEHICLES POSSESSION

## HOW TO READ THE RESULTS ?

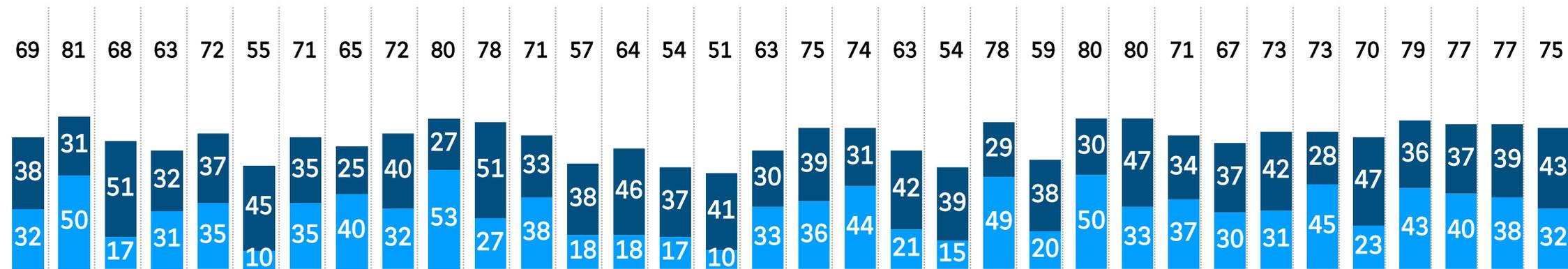
In New Zealand in 2026, 79% of the companies are already including or are considering including passenger cars that were not new when acquired. 70% of the companies are already including or are considering including LCVs that were not new when acquired.

IN %



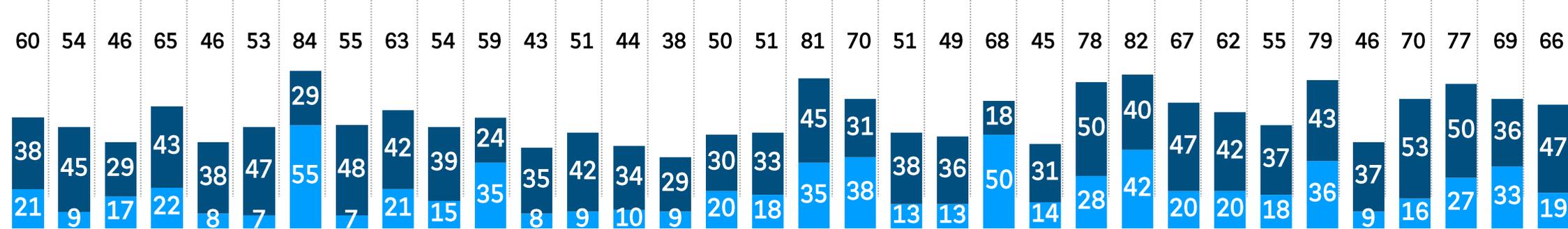
Already including or consider including in the next 3 years

PASSENGER CARS  
 Consider including in the next 3 years  
 Already including



Already including or consider including in the next 3 years

LCVS  
 Consider including in the next 3 years  
 Already including



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

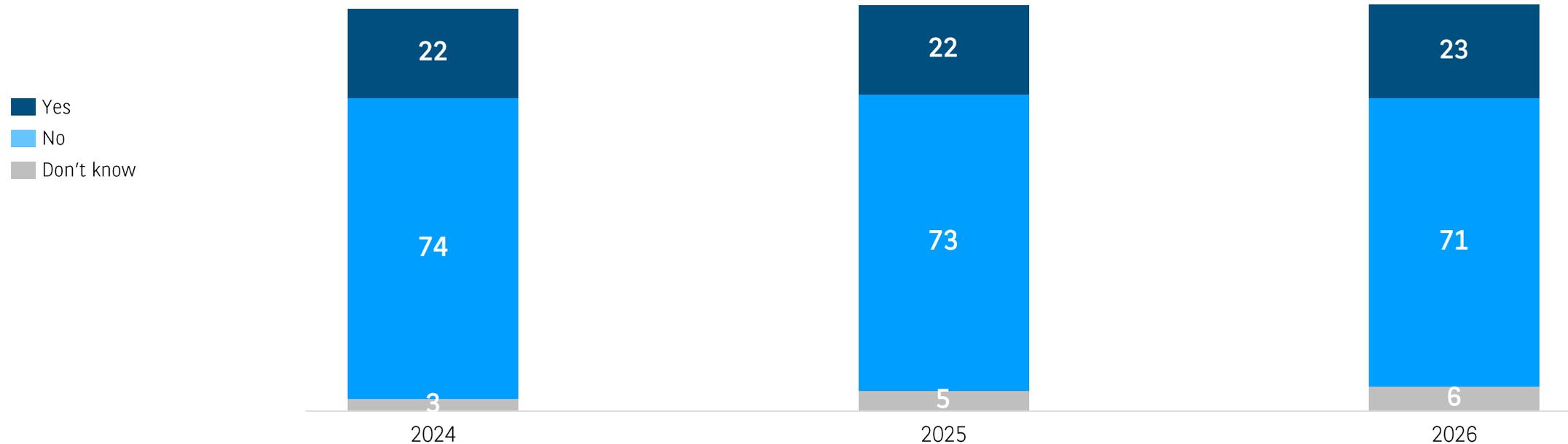
# OUTSOURCING OF SERVICES IN TERMS OF FLEET MANAGEMENT

## HOW TO READ THE RESULTS ?

In 2026, 23% of the companies outsource services in terms of fleet management.

Local question

IN %



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

X% Significantly higher / lower vs. previous wave



# 02

## FINANCING METHODS

How do companies finance their fleets?



## Outright/direct purchase remains the primary fleet financing method in New Zealand

Outright/direct purchase is the predominant financing method, employed by 50% of companies in New Zealand. Financial leasing is employed by 22%, while operational leasing stands at 18%, which is below the APAC average of 27%. A similar trend across vehicle types and company sizes, with stable figures.

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

Among companies using or considering second-hand vehicles, 19% use Operational leasing as their main financing method, or plan to do so if considering second-hand vehicles, below the APAC average of 28%.

## The growth potential for operational leasing remains stable

In 2026, 22% of companies in New Zealand intend to introduce or increase their use of operational leasing for fleet financing, stable below the APAC average of 37%.

## Demand for consulting expertise and additional services is decreasing

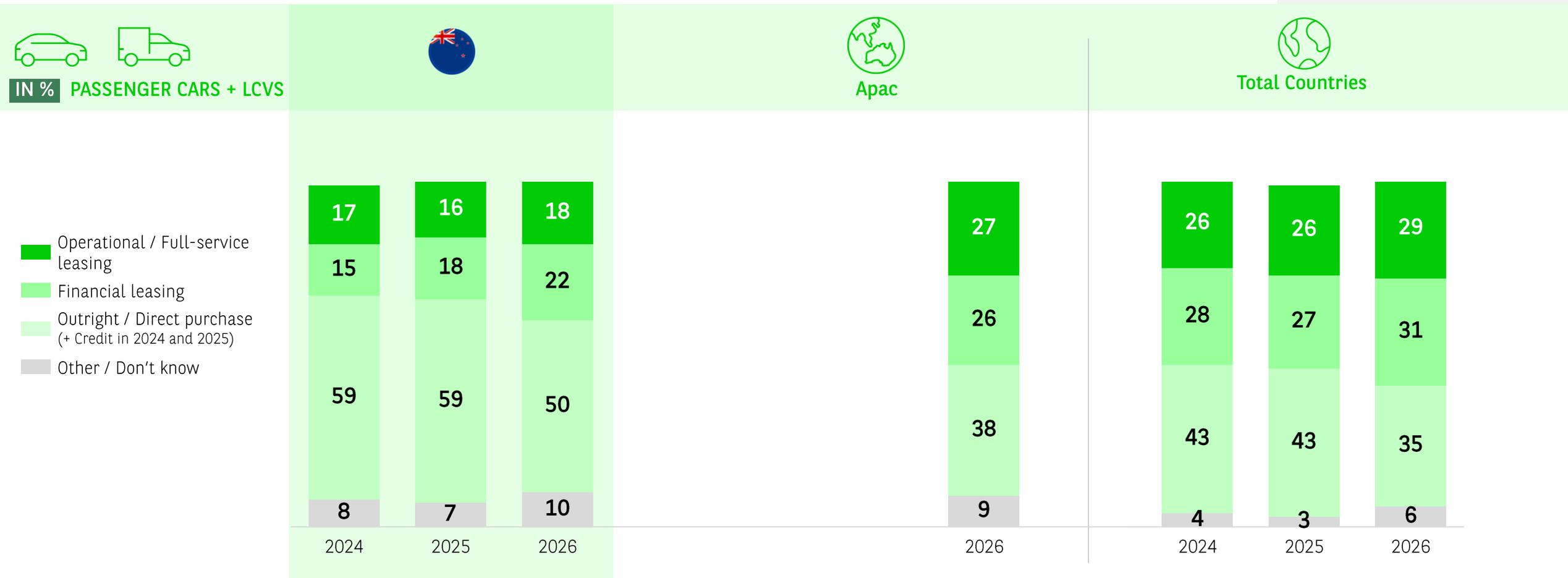
Only 7% of fleet managers surveyed show interest in consulting expertise to optimize costs and fleet management, and 30% express interest in at least one additional service or product related to fleet management, a decreasing interest compared with 2025 (39%).

# MAIN FLEET FINANCING METHOD

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 18% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their company vehicles.

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



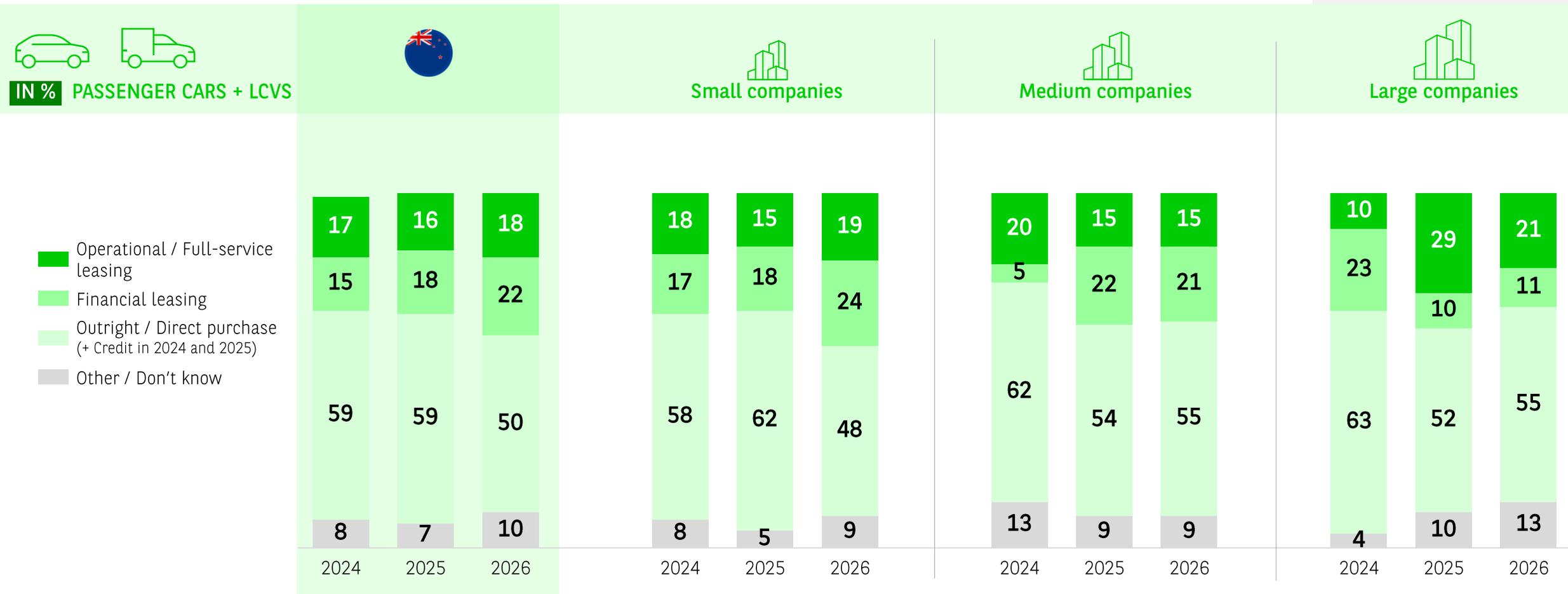
B2. What is the main method used to finance your company vehicles today?  
Basis: companies with corporate vehicles = 100%

# MAIN FLEET FINANCING METHOD

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 18% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their company vehicles.

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



B2. What is the main method used to finance your company vehicles today?

Basis: companies with corporate vehicles = 100%

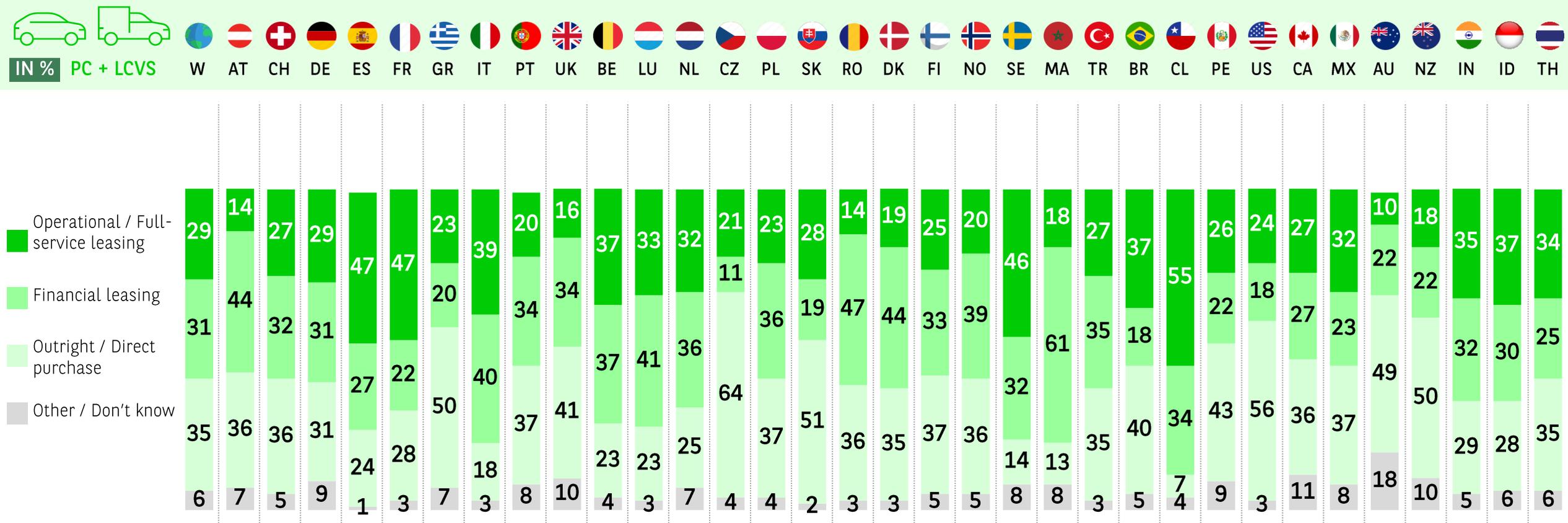


# MAIN FLEET FINANCING METHOD

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 18% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their company vehicles.

Item "Credit" deleted in 2026



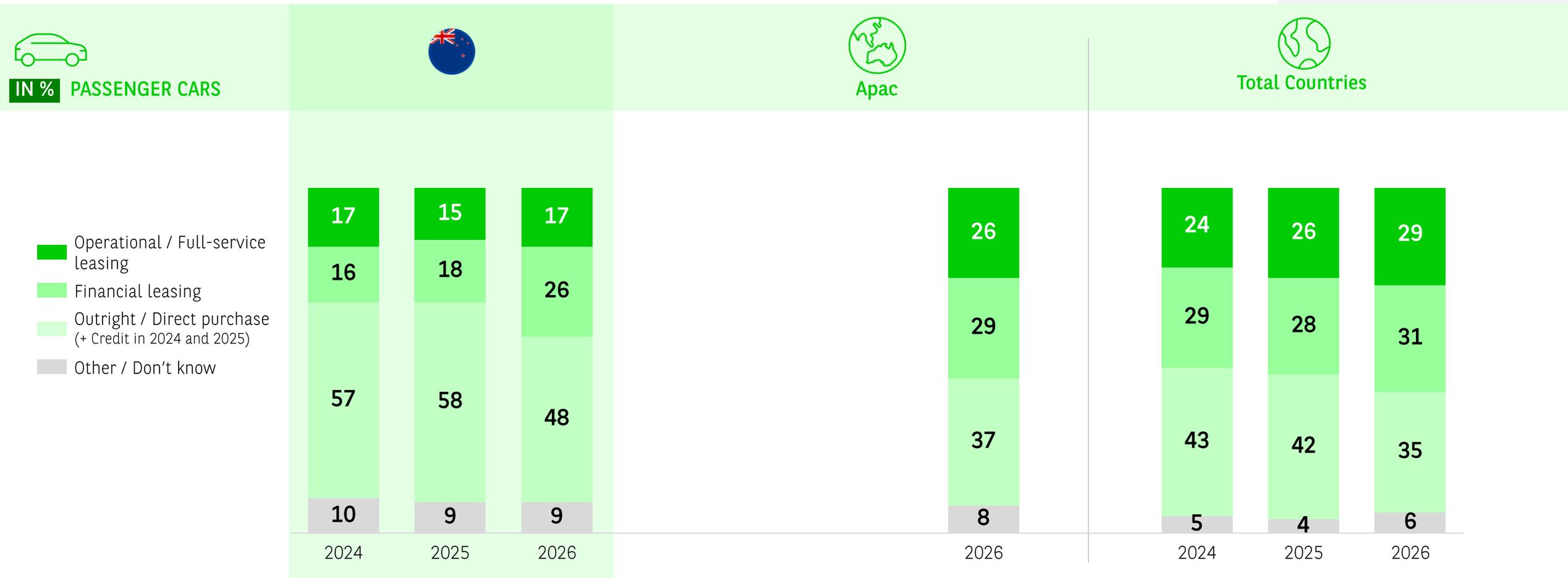
B2. What is the main method used to finance your company vehicles today?  
Basis: companies with corporate vehicles = 100%

# MAIN PASSENGER CARS FINANCING METHOD

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 17% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their passenger cars.

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



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

Basis: companies with passenger cars

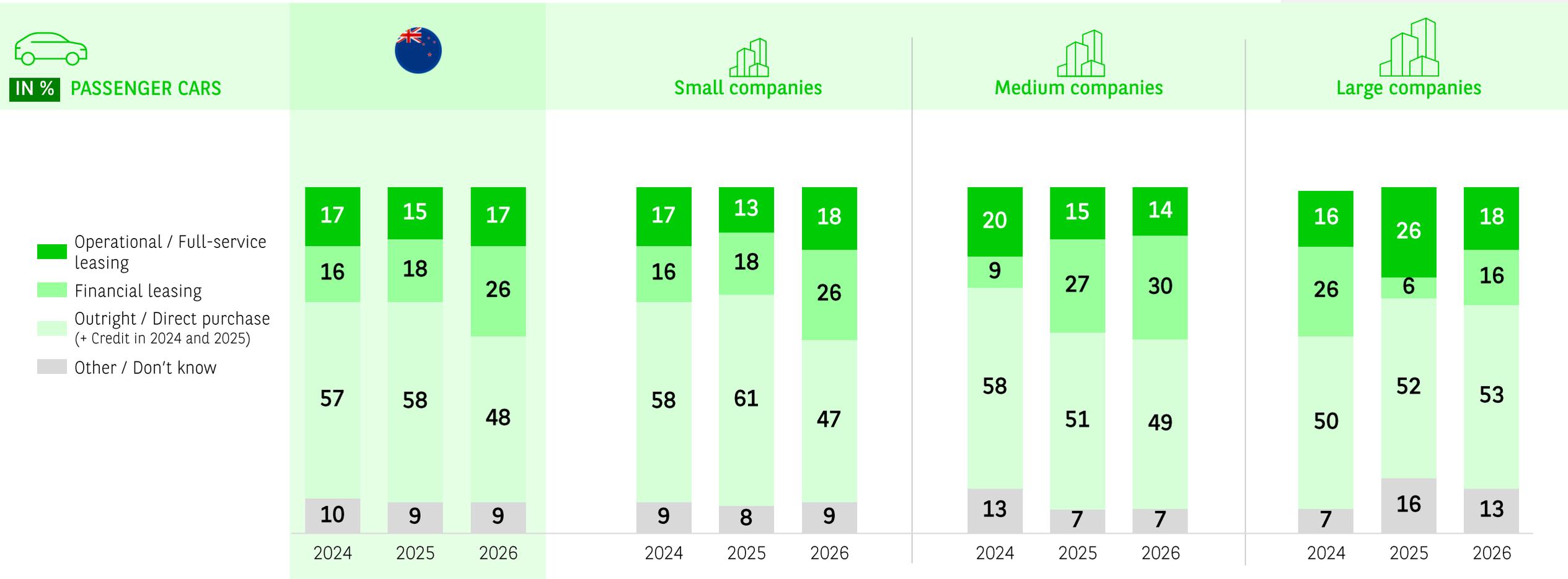


# MAIN PASSENGER CARS FINANCING METHOD

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 17% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their passenger cars.

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



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

# MAIN PASSENGER CARS FINANCING METHOD

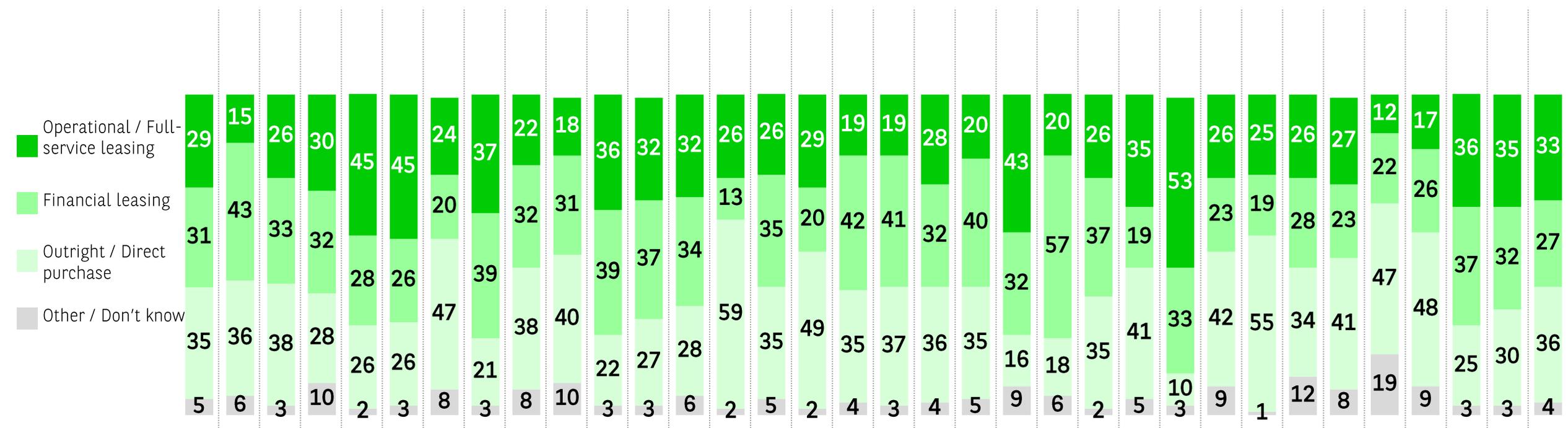
## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 17% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their passenger cars.

Item "Credit" deleted in 2026



IN % CARS



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

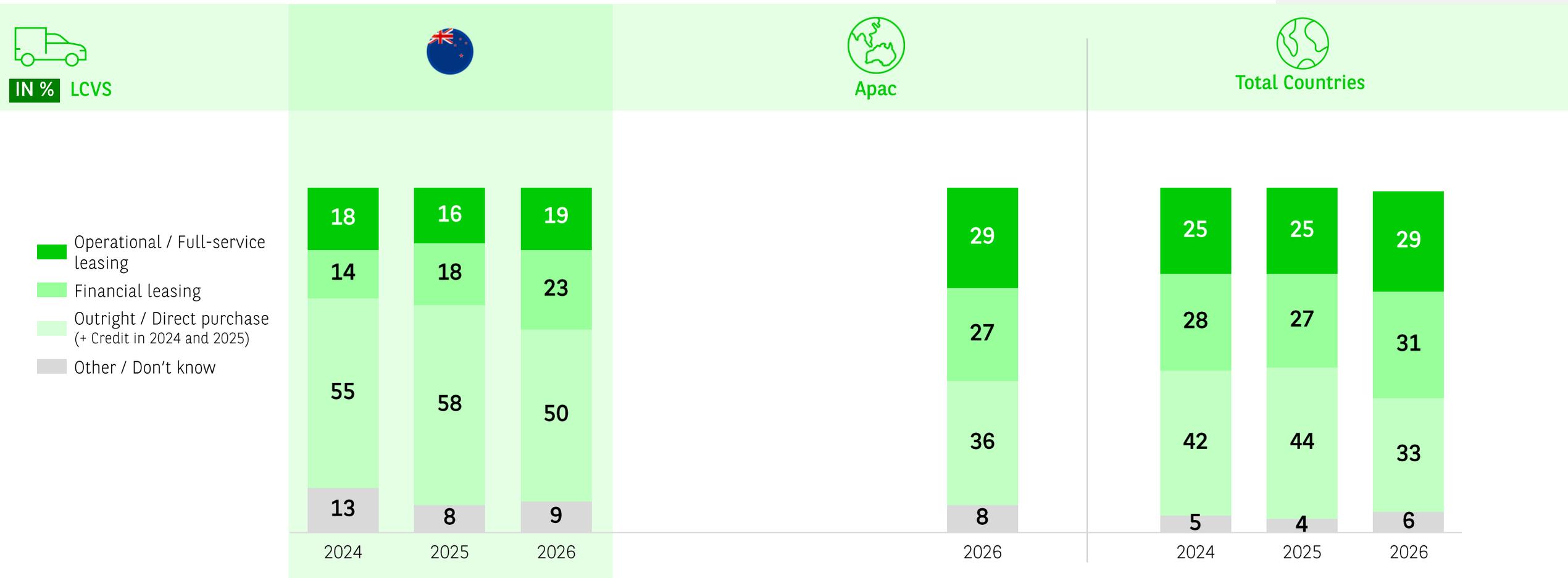


# MAIN LCV FINANCING METHOD

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 19% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their LCVs.

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



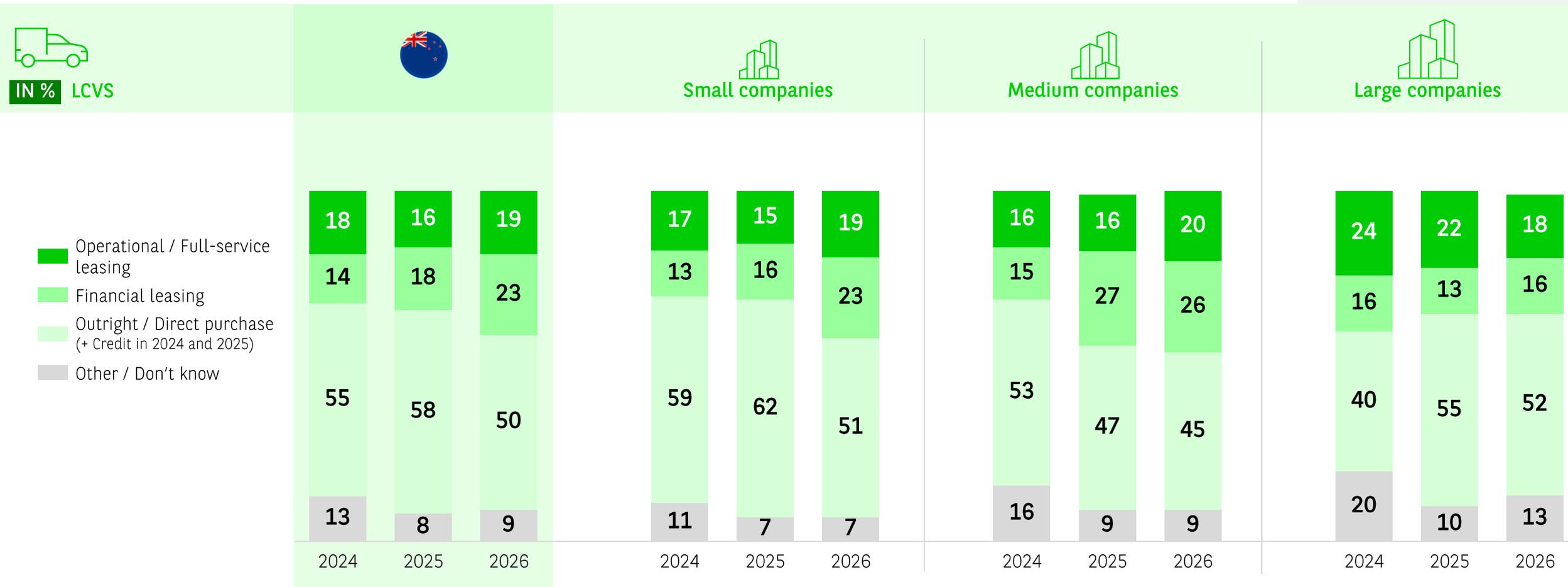
B4. And what is the main method used to finance your light commercial vehicles or vans today?  
Basis: companies with LCVs

# MAIN LCV FINANCING METHOD

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 19% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their LCVs.

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



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

# MAIN LCV FINANCING METHOD

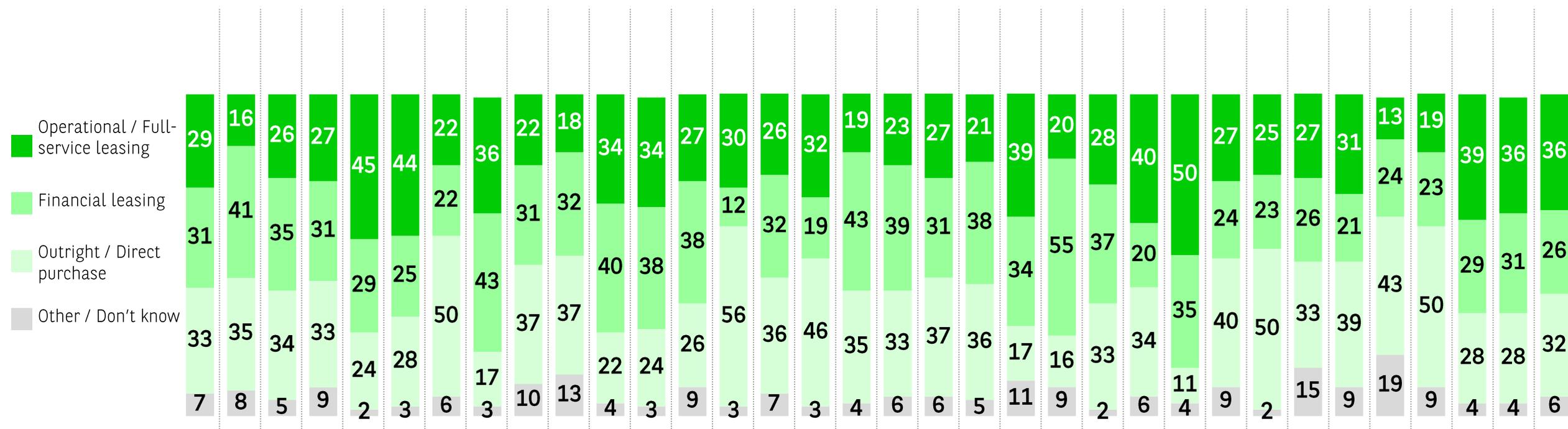
## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 19% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their LCVs.

Item "Credit" deleted in 2026



IN % LCVS



B4. And what is the main method used to finance your light commercial vehicles or vans today?

Basis: companies with LCVs

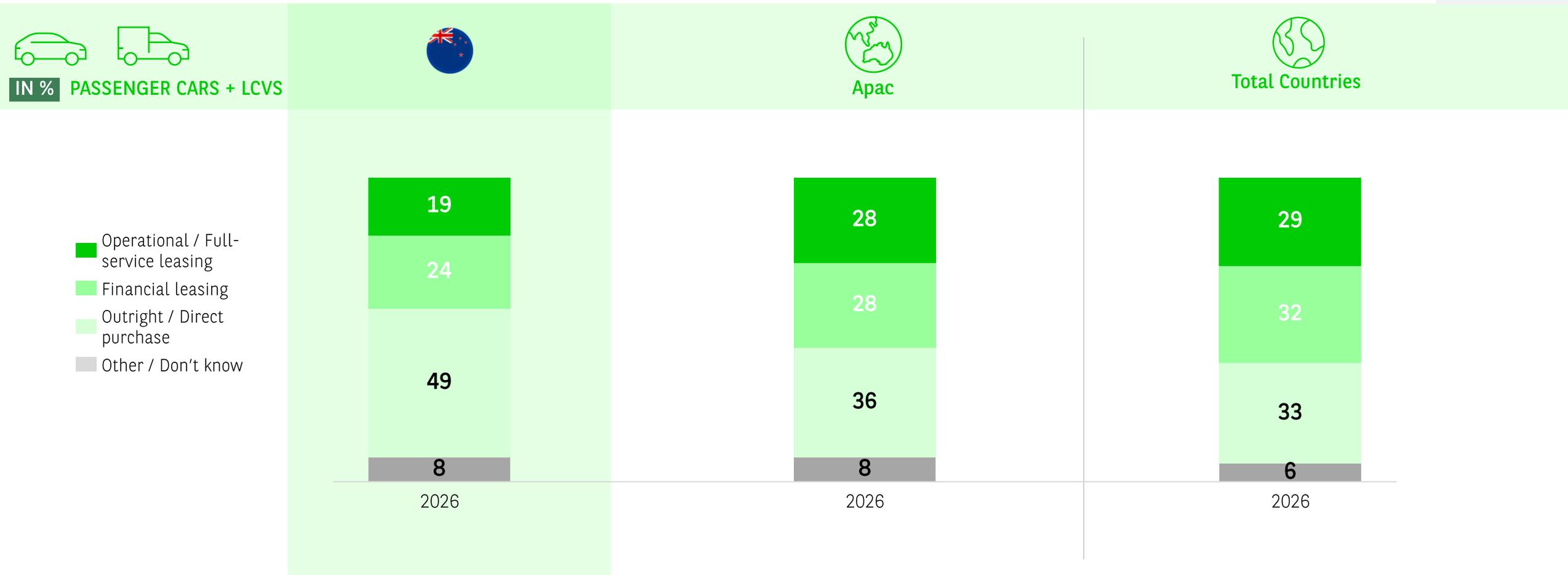


# MAIN FLEET FINANCING METHOD FOR SECOND-HAND VEHICLES

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 19% of the companies considering or having second-hand vehicles are (plan on) using Operational Leasing / Full-Service Leasing as main method to finance their company second-hand vehicles.

New question



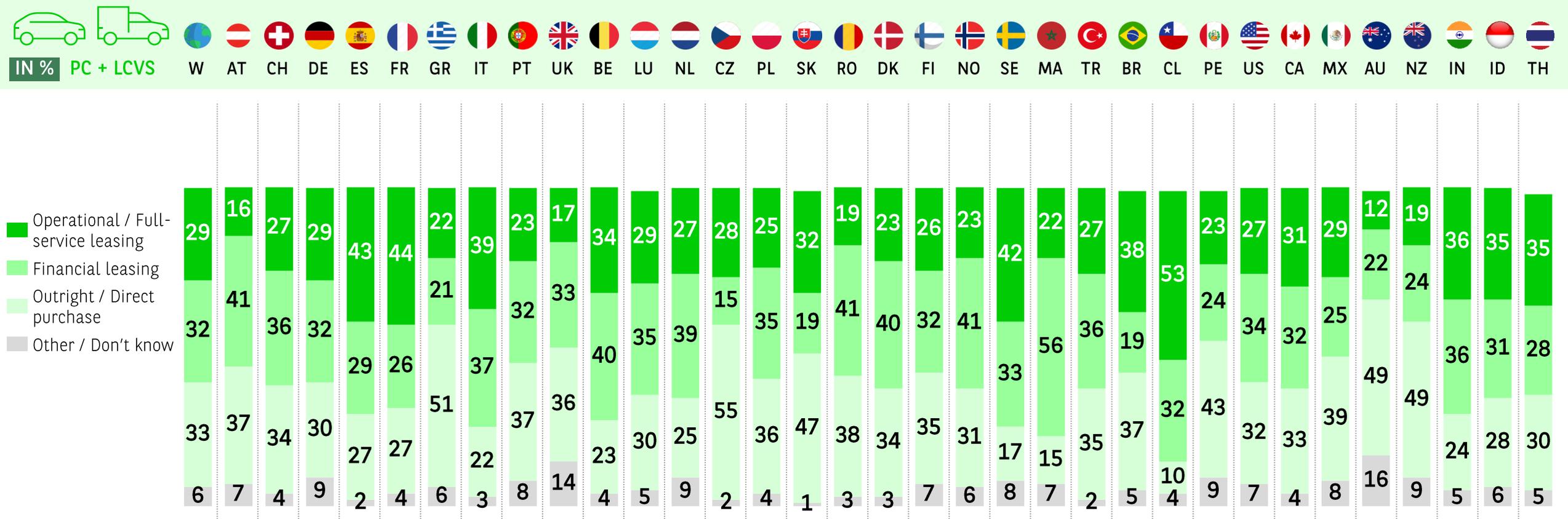
B5. What is the (planned) main method currently used to finance the second-hand vehicles in your fleet?  
Basis: companies considering or having corporate second-hand vehicles"

# MAIN FLEET FINANCING METHOD FOR SECOND-HAND VEHICLES

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 19% of the companies considering or having second-hand vehicles are (plan on) using Operational Leasing / Full-Service Leasing as main method to finance their company second-hand vehicles.

New question

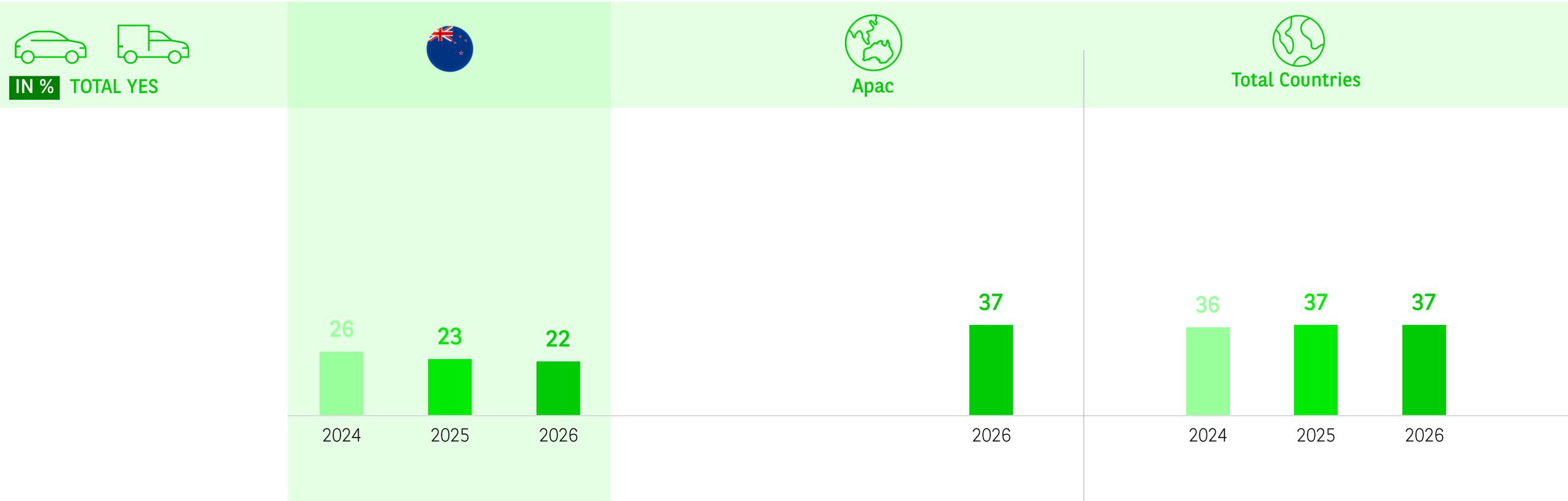


B5. What is the (planned) main method currently used to finance the second-hand vehicles in your fleet?  
Basis: companies considering or having corporate second-hand vehicles"

# INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATIONAL LEASING

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 22% of the companies intend to introduce or increase the use of Operational Leasing / Full-Service Leasing to finance their corporate fleet in the next three years.



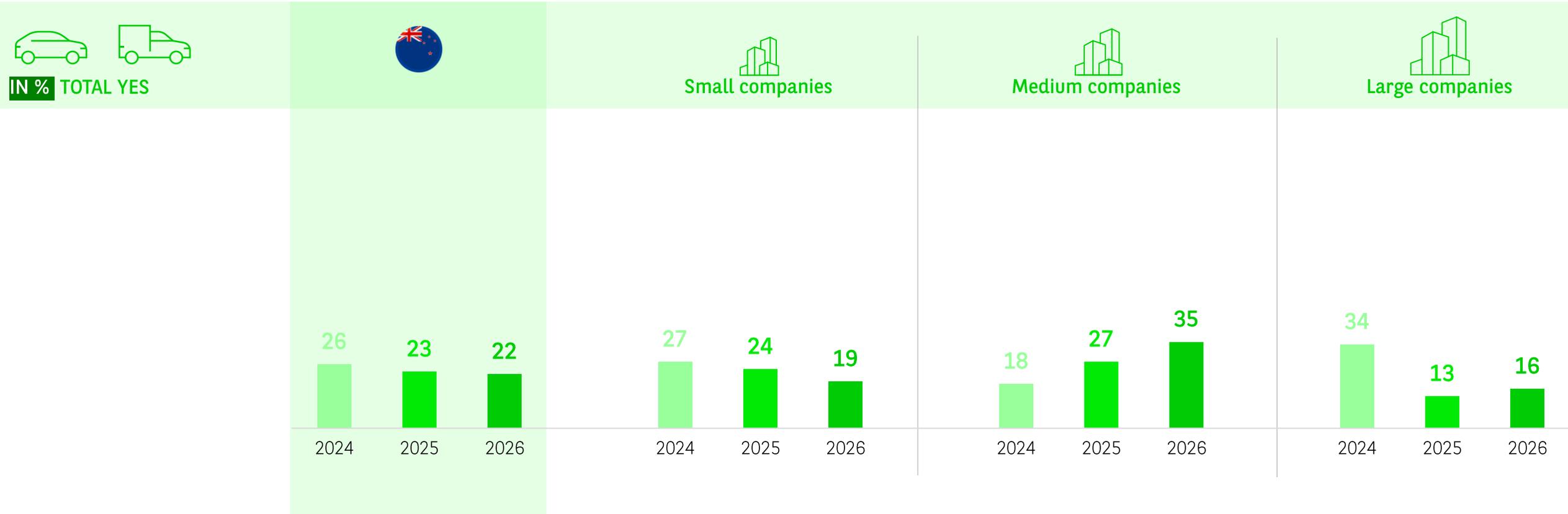
B8bis. In the next three years do you intend to either introduce or increase the use of Operational Leasing / Full-Service Leasing to finance your corporate fleet?  
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

# INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATIONAL LEASING

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 22% of the companies intend to introduce or increase the use of Operational Leasing / Full-Service Leasing to finance their corporate fleet in the next three years.



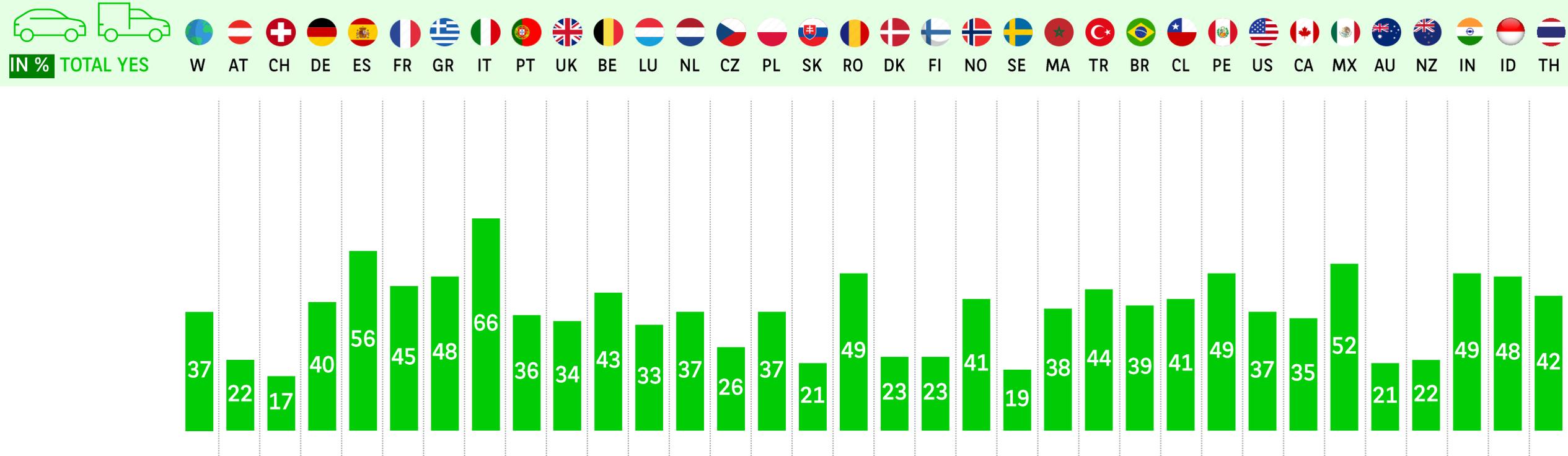
B8bis. In the next three years do you intend to either introduce or increase the use of Operational Leasing / Full-Service Leasing to finance your corporate fleet?  
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

# INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATIONAL LEASING

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 22% of the companies intend to introduce or increase the use of Operational Leasing / Full-Service Leasing to finance their corporate fleet in the next three years.



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

Basis: companies with corporate vehicles = 100%



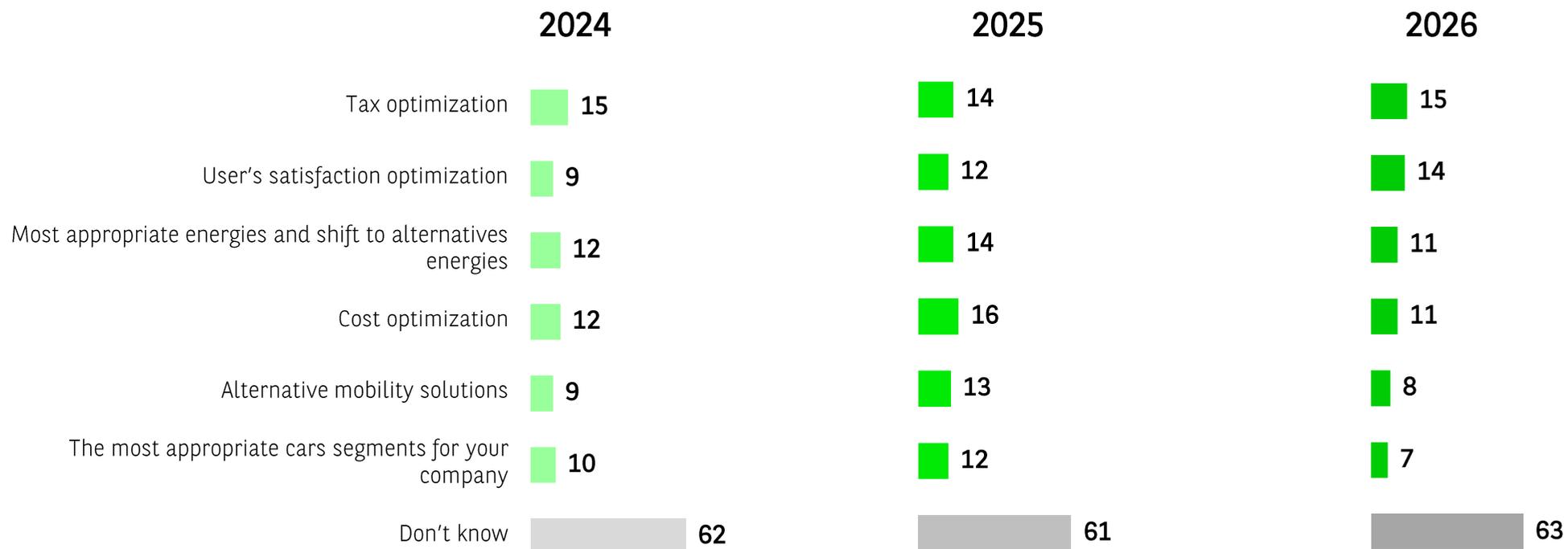
# INTEREST IN ADVICE FROM EXTERNAL SUPPLIER

## HOW TO READ THE RESULTS ?

In 2026, 15% of the companies would be interested in receiving advices from an external supplier on Tax optimization.

Local question

IN %



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

X% Significantly higher / lower vs. previous wave

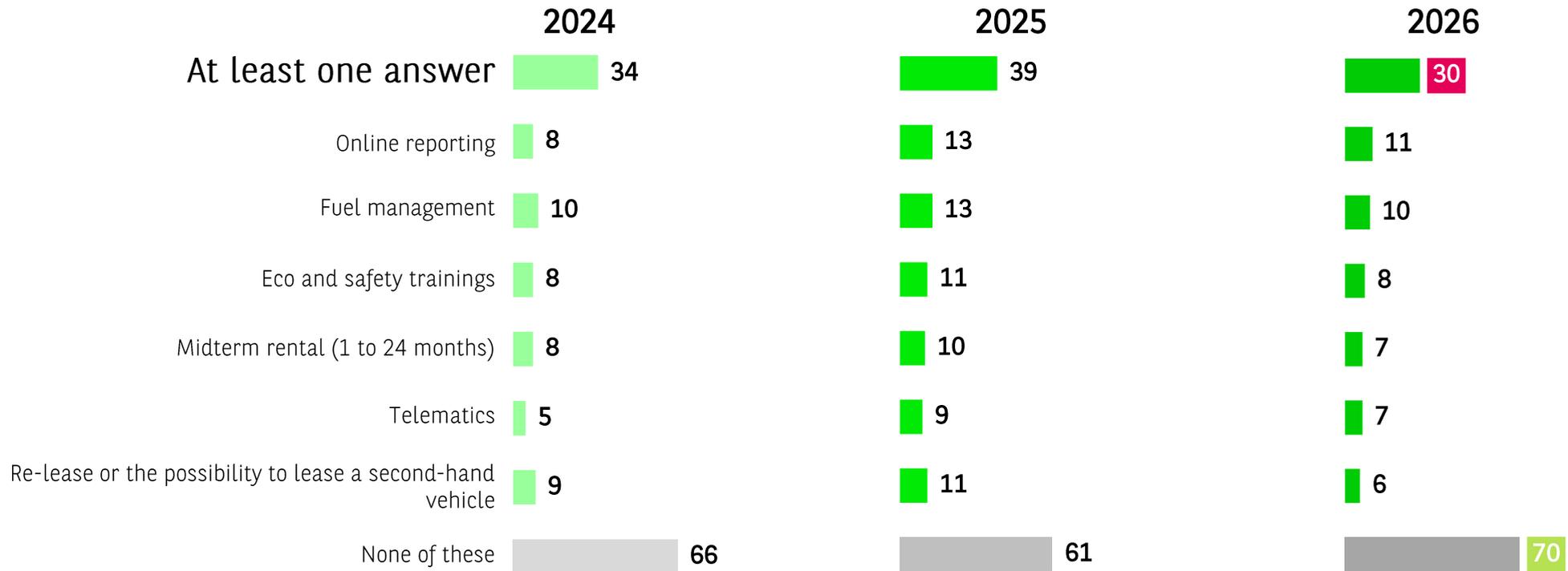


## HOW TO READ THE RESULTS ?

In 2026, 30% of the companies would be interested in at least one additional services or products concerning their fleet management. 11% of the companies would be interested in Online reporting.

Local question

IN %



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

X% Significantly higher / lower vs. previous wave



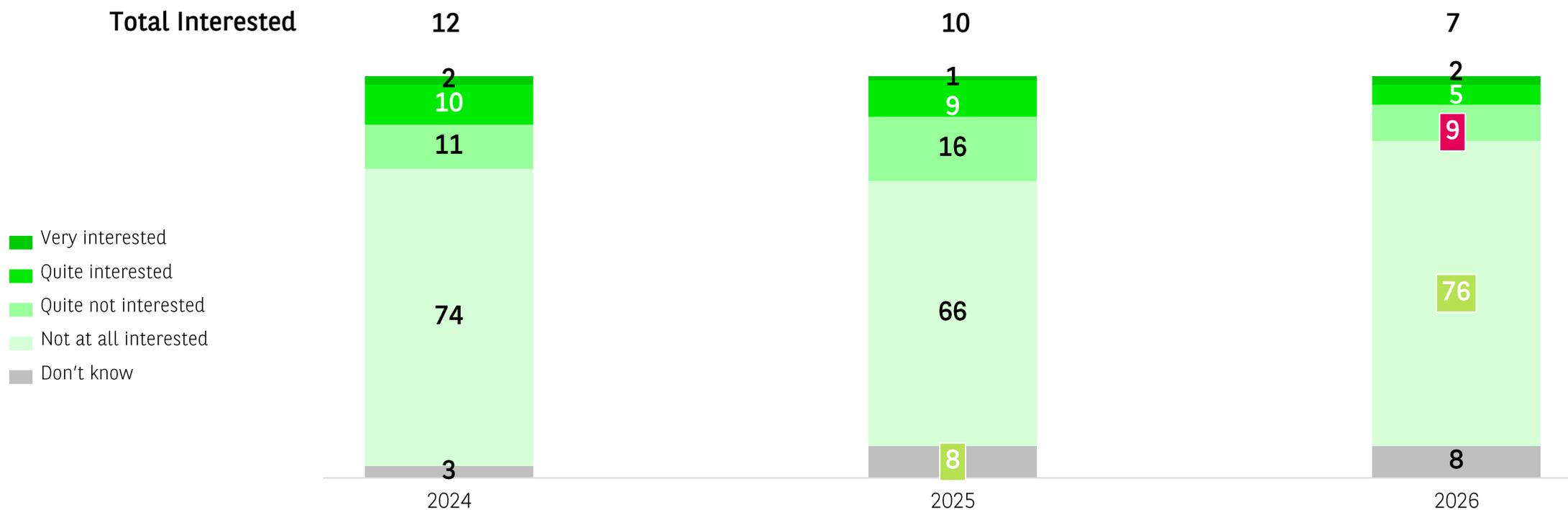
# INTEREST IN CONSULTING EXPERTISE FOR COST OPTIMIZATION

## HOW TO READ THE RESULTS ?

In 2026, 7% of the companies would be interested in benefiting from consulting expertise on how to optimize costs and process of fleet administration.

Local question

IN %



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

X% Significantly higher / lower vs. previous wave



# 03

## ENERGY MIX

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



## A stable and significant fleet electrification in New Zealand

56% of New Zealand companies have implemented at least one type of electrified technology (HEV, PHEV, or BEV) for passenger cars. This stable level of adoption is higher than the APAC average of 31% and is primarily driven by medium-sized companies (64%), compared to small (53%) and large companies (55%).

An additional 24% of companies are considering the idea of implementing electrified technology for passenger cars.

## Hybrids present the most promising pathway for transitioning New Zealand passenger fleets

In New Zealand companies, 29% are equipped with PHEVs, followed by 21% with HEVs and 18% with BEVs, maintaining stable levels compared with 2025. HEVs are the most considered for future adoption at 24%, followed by BEVs at 22% and PHEVs at 19%.

## Environmental impact remains the primary motivation for switching to electrified technologies

The top reason for shifting to electrified technologies in 2026 remains their lower environmental impact (55%). Other motivations include reduced fuel expenses (38%) and a total cost of ownership (TCO) that is comparable to or lower than petrol or diesel alternatives (36%).

## The transition to electrified LCV fleets remains a cautious process

3% of companies in New Zealand have adopted BEV for their LCV fleets, while 19% are considering it. This trend remains consistent across different company sizes and is aligning with the APAC average.

## A lack of charging infrastructure continues to limit wider EV fleet adoption

The primary constraint to broader EV adoption for passenger cars is the lack of charging points, whether on streets, at home, or in corporate settings, as cited by 49% of companies in New Zealand.

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

Charging at the company premises is a current or future charging policy for 86% of the New Zealand fleets (passenger cars or LCVs), matching the APAC average. Overall, 52% have already installed charging stations or plan to within the next year, driven by medium-sized companies (62%).

Public charging is the second most popular option, with 66% of companies considering this approach, matching the APAC average. Among these, 63% reimburse energy costs through expense claims, 37% provide energy cards to drivers, as done in other APAC markets.

Home charging remains the least common practice, adopted by only 18% of companies. Among these companies, 79% offer or plan to offer at least one charging solution to company car drivers, such as wallboxes (48%), reinforced sockets (40%), or smart cables (26%). Additionally, 90% provide financial support for home charging, with 51% offering partial coverage, another 21% providing lump-sums, and 19% offering full coverage. Furthermore, 32% fully reimburse energy costs, while 35% offer partial reimbursement.

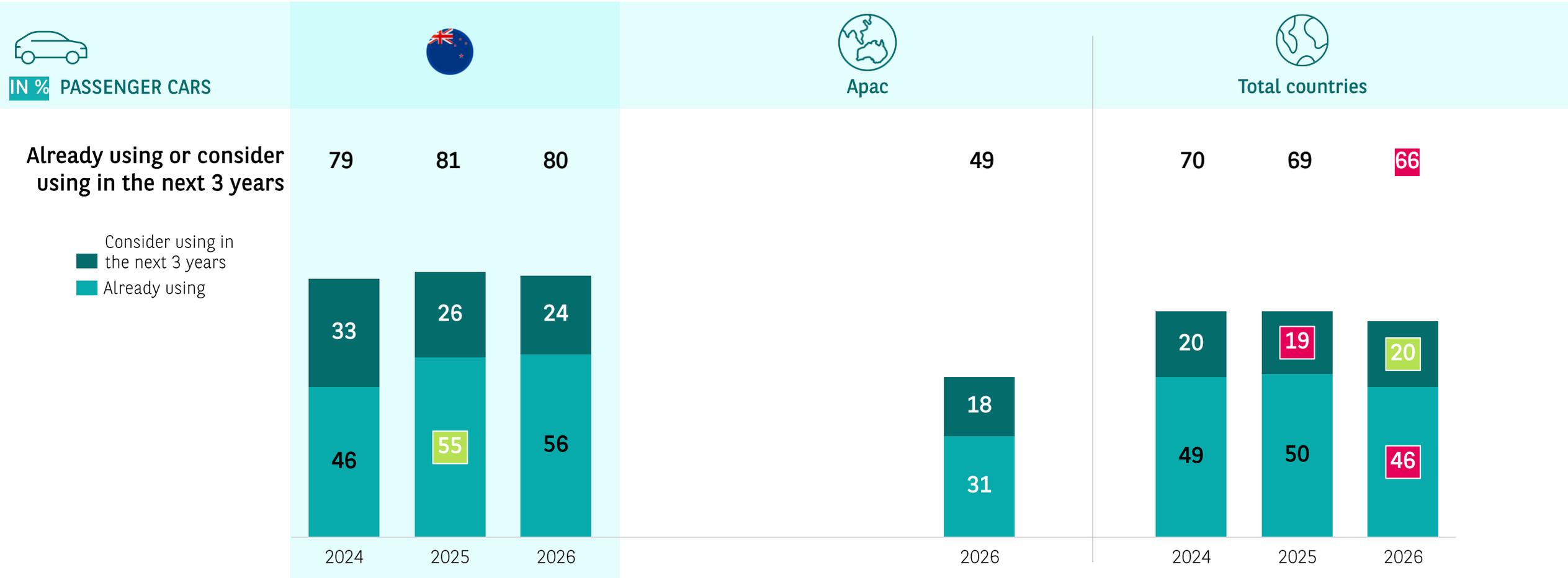
## Leasing providers play a significant role in energy-mix decisions

Overall, 77% of New Zealand companies using operational or financial leasing claim that their provider influences their energy mix choices.

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

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 80% of the companies with passenger cars are already using at least one electrified vehicles technology among BEV, PHEV, HEV or are considering doing so in the next 3 years.



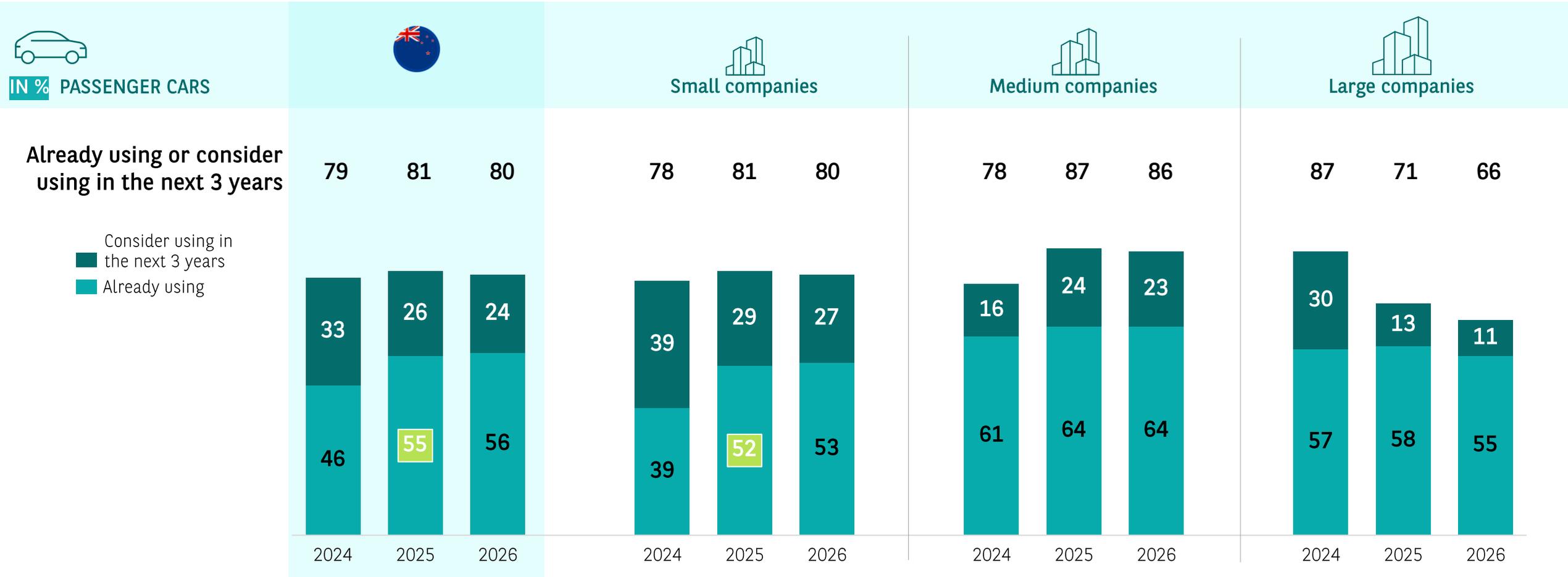
E28. Amongst the following electrified vehicles technologies, which ones do you currently use...? / E28bis. Amongst the following electrified vehicles technologies, which ones are you considering using...? Basis: companies with passenger cars

X% Significantly higher / lower vs. previous wave

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

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 80% of the companies with passenger cars are already using at least one electrified vehicles technology among BEV, PHEV, HEV or are considering doing so in the next 3 years.



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

X% Significantly higher / lower vs. previous wave

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

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 80% 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.

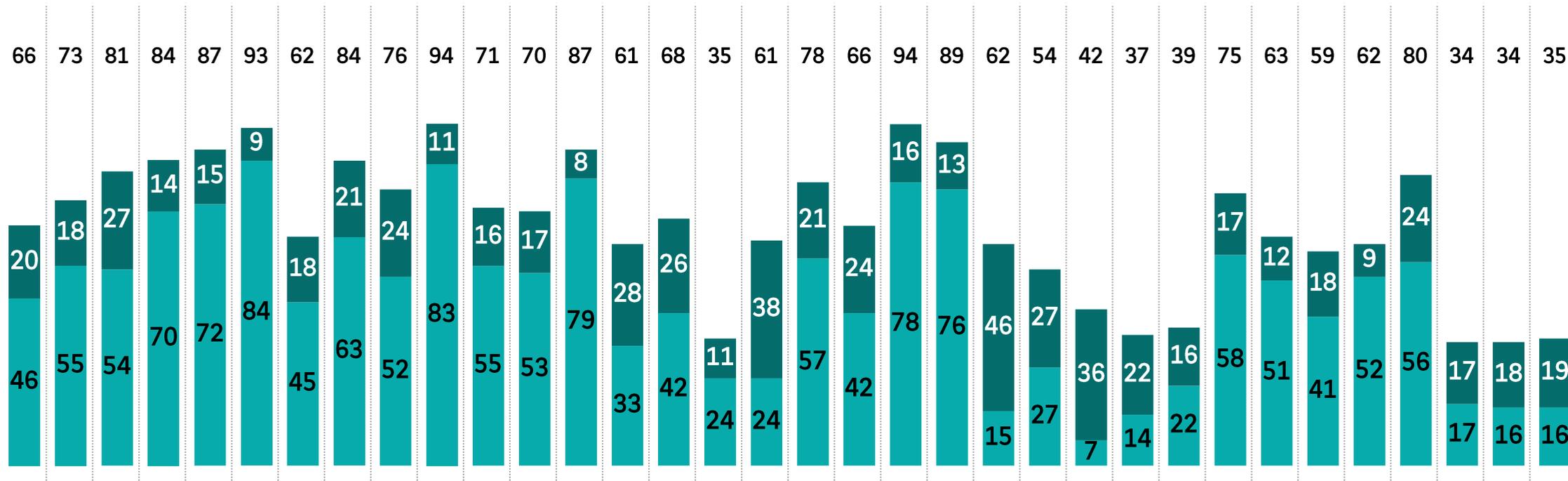


IN % PC



Already using or  
consider in the  
next 12 months

Consider using  
Already using



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

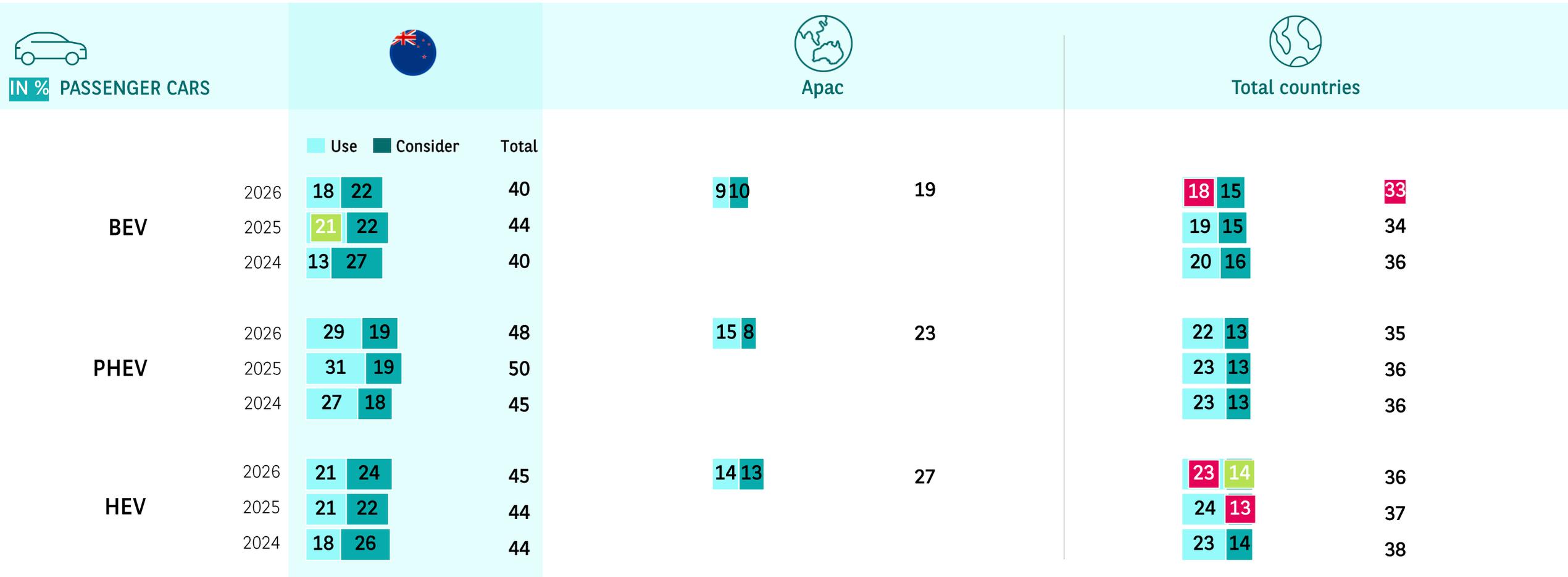


# ELECTRIFIED VEHICLES TECHNOLOGIES USAGE

## DETAIL PER TECHNOLOGY

### HOW TO READ THE RESULTS ?

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



E28. Amongst the following electrified vehicles technologies, which ones do you currently use...?

E28bis. Amongst the following electrified vehicles technologies, which ones are you considering using...?

Basis: companies with passenger cars

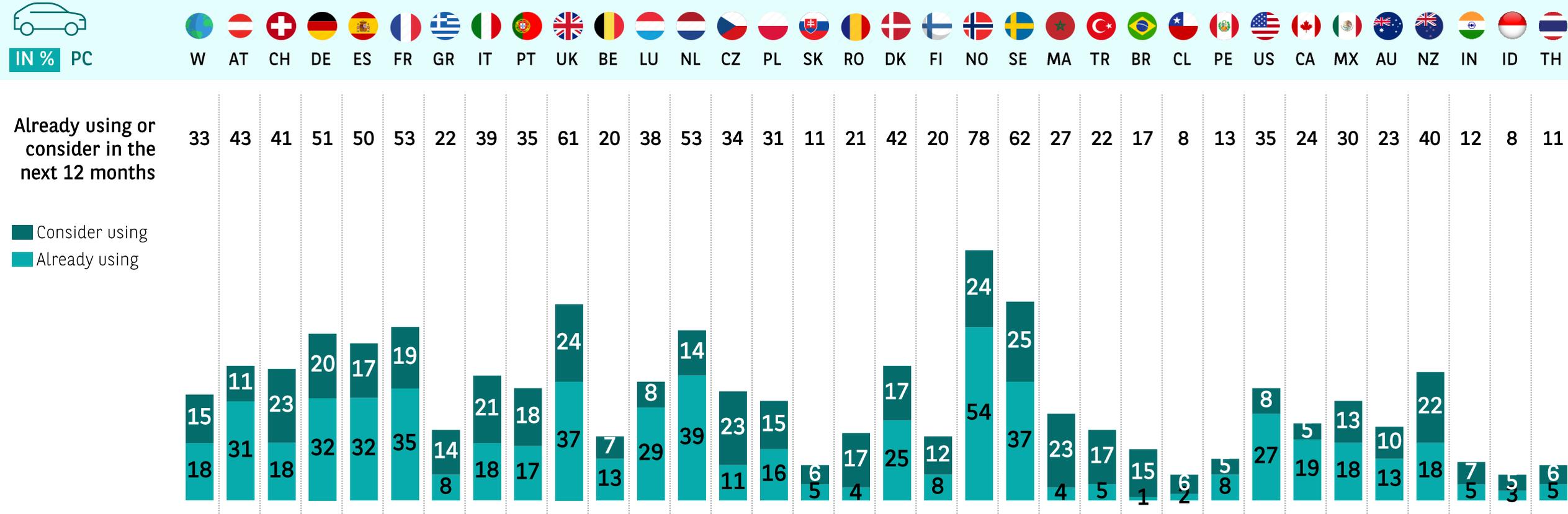
X% Significantly higher / lower vs. previous wave

# ELECTRIFIED VEHICLES TECHNOLOGIES USAGE

## FOCUS ON BEV

### HOW TO READ THE RESULTS ?

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



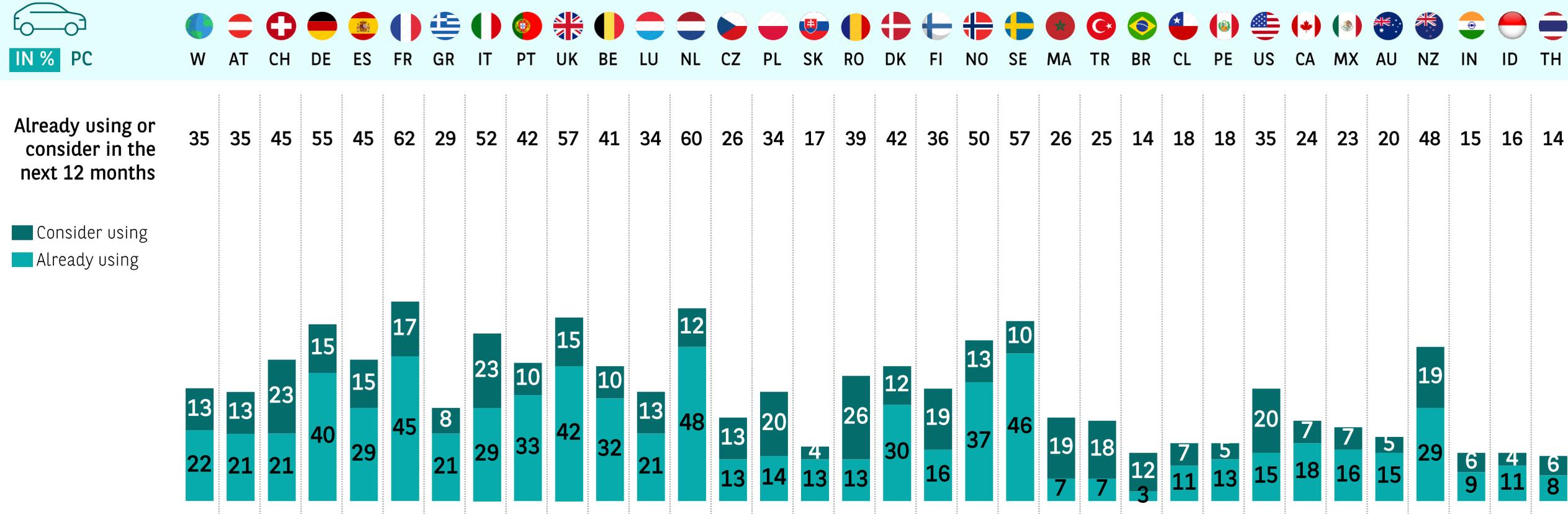
E28. Amongst the following electrified vehicles technologies, which ones do you currently use...?  
 E28bis. Amongst the following electrified vehicles technologies, which ones are you considering using...?  
 Basis: companies with passenger cars

# ELECTRIFIED VEHICLES TECHNOLOGIES USAGE

## FOCUS ON PHEV

### HOW TO READ THE RESULTS ?

In New Zealand in 2026, 48% of the companies with passenger cars are already using PHEV or are considering using it in the next three years.



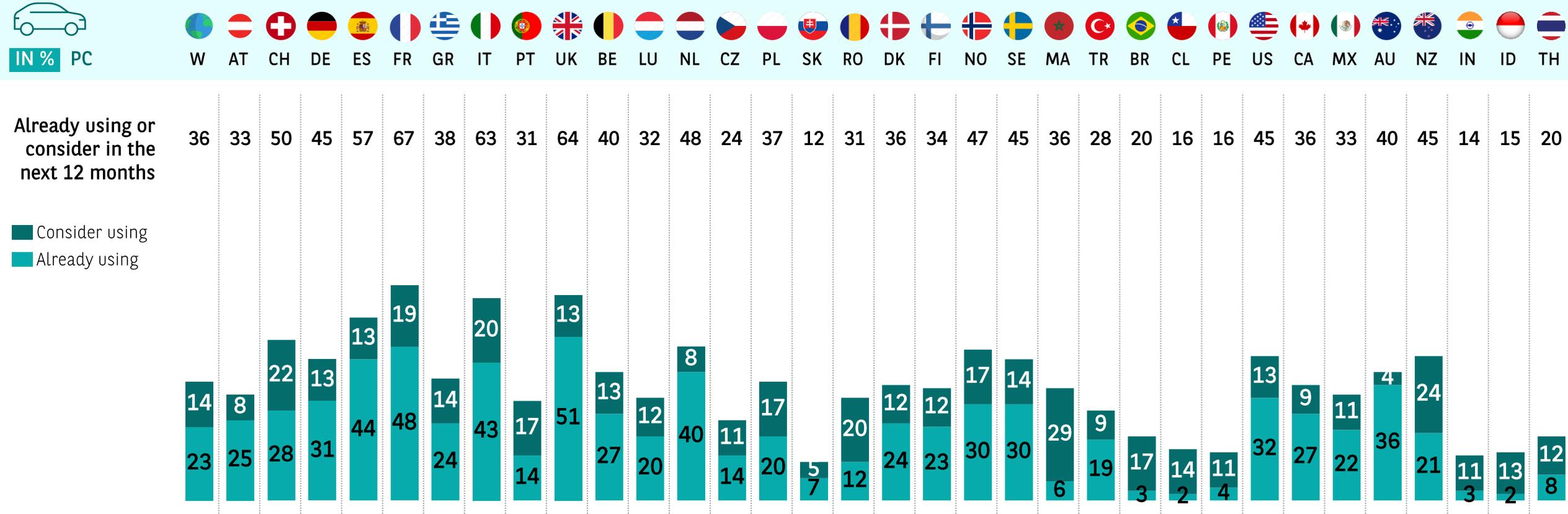
E28. Amongst the following electrified vehicles technologies, which ones do you currently use...?  
 E28bis. Amongst the following electrified vehicles technologies, which ones are you considering using...?  
 Basis: companies with passenger cars

# ELECTRIFIED VEHICLES TECHNOLOGIES USAGE

## FOCUS ON HEV

### HOW TO READ THE RESULTS ?

In New Zealand in 2026, 45% of the companies with passenger cars are already using HEV or are considering using it in the next three years.

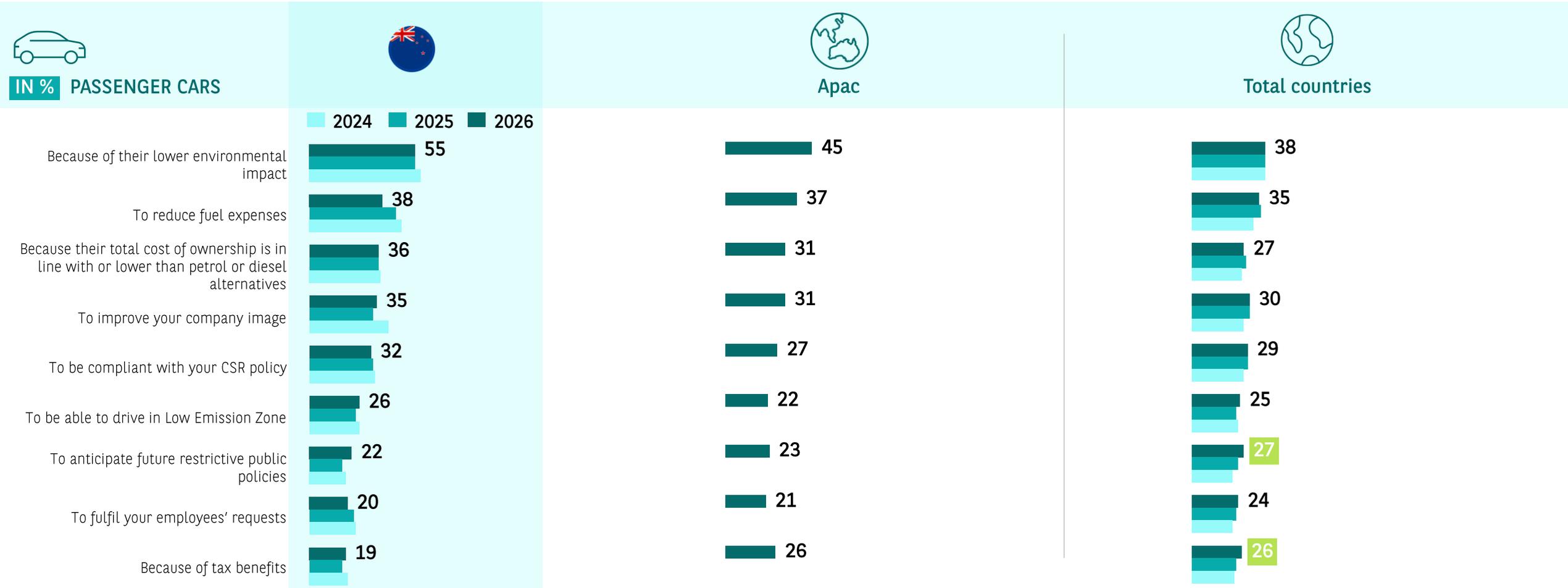


E28. Amongst the following electrified vehicles technologies, which ones do you currently use...?  
 E28bis. Amongst the following electrified vehicles technologies, which ones are you considering using...?  
 Basis: companies with passenger cars

# REASONS FOR IMPLEMENTING ELECTRIFIED VEHICLES TECHNOLOGIES FOR PASSENGER CARS

## HOW TO READ THE RESULTS ?

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



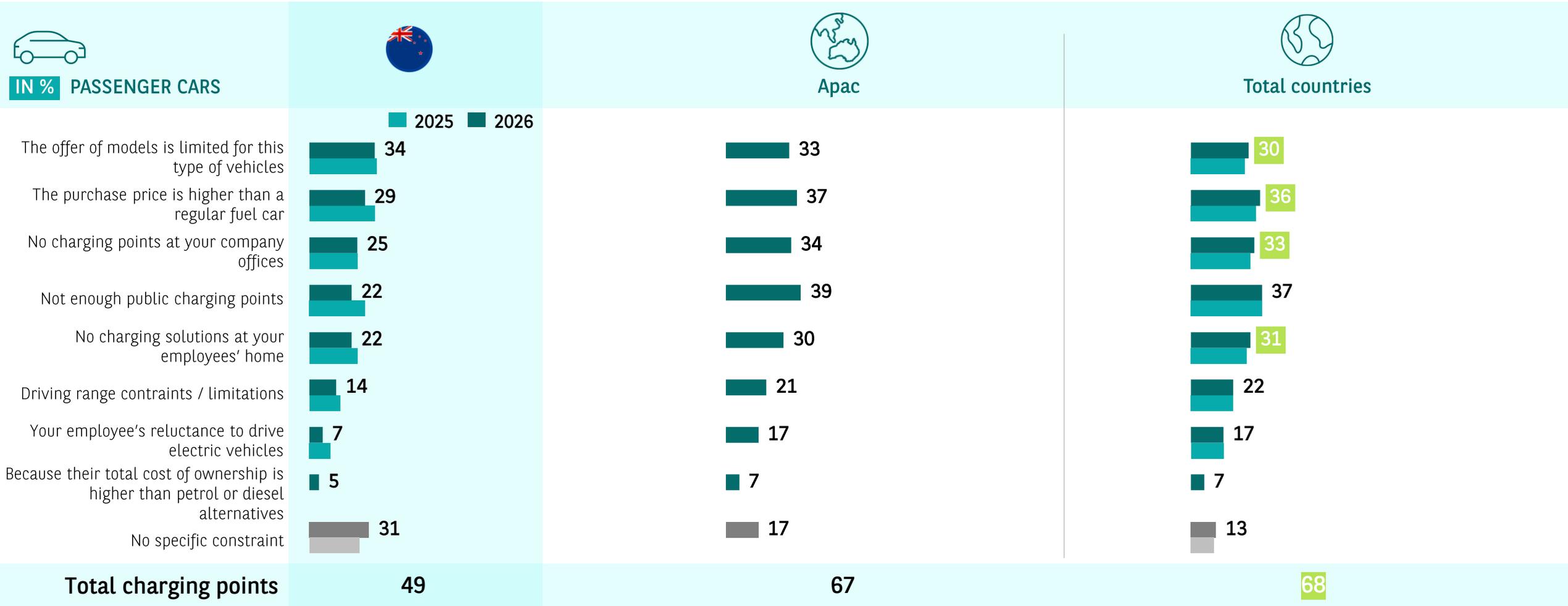
E28A. Why have you already implemented or why do you consider implementing these electrified vehicles technologies?  
Basis: companies that are already using or considering using electrified vehicles technologies for passenger cars

X% Significantly higher / lower vs. previous wave

# CONSTRAINTS FOR USING ELECTRIC PASSENGER CARS

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 34% of the companies with passenger cars declare that the main constraint for using electric passenger cars is: The offer of models is limited for this type of vehicles. And 49% of the companies mention at least one reason related to charging points.



E28B\_1. What are the constraints of using electric passenger cars (Battery Electric Vehicles)?  
Basis: companies with PCs and aware of EV technology

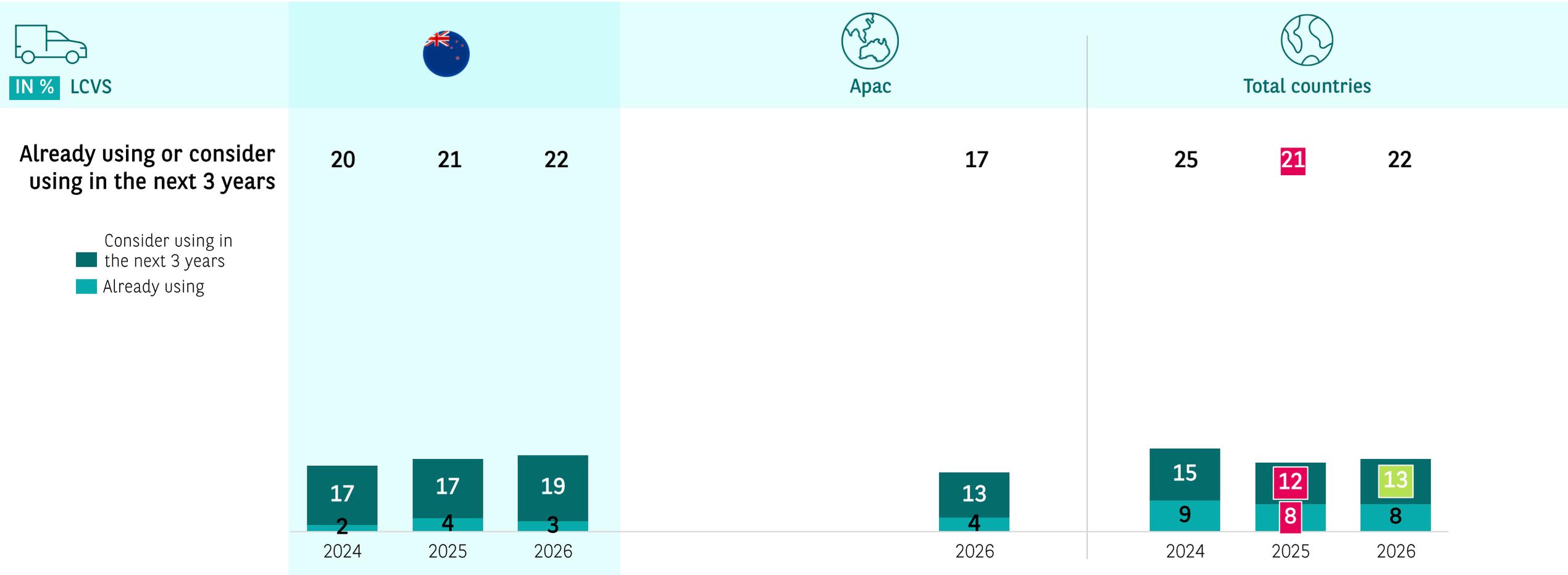
X% Significantly higher / lower vs. previous wave

# ELECTRIFIED VEHICLES TECHNOLOGIES USAGE

## FOCUS ON BEV

### HOW TO READ THE RESULTS ?

In New Zealand 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

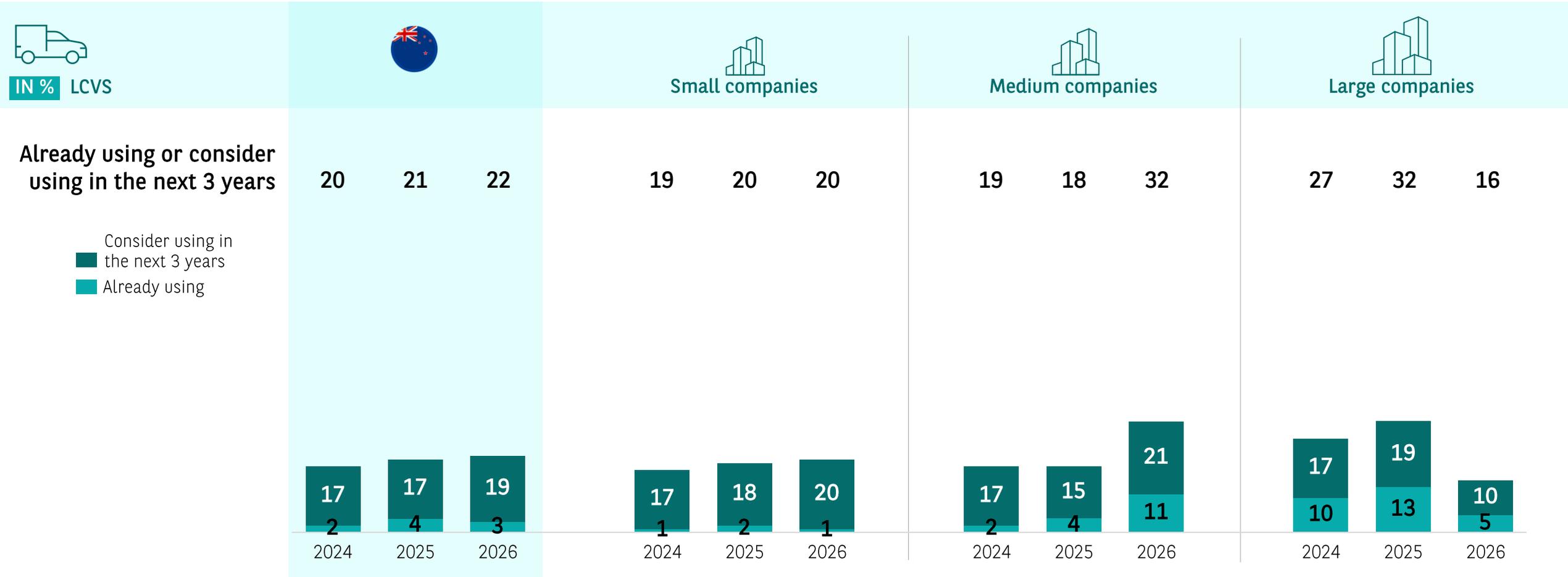
X% Significantly higher / lower vs. previous wave

# ELECTRIFIED VEHICLES TECHNOLOGIES USAGE

## FOCUS ON BEV

### HOW TO READ THE RESULTS ?

In New Zealand 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

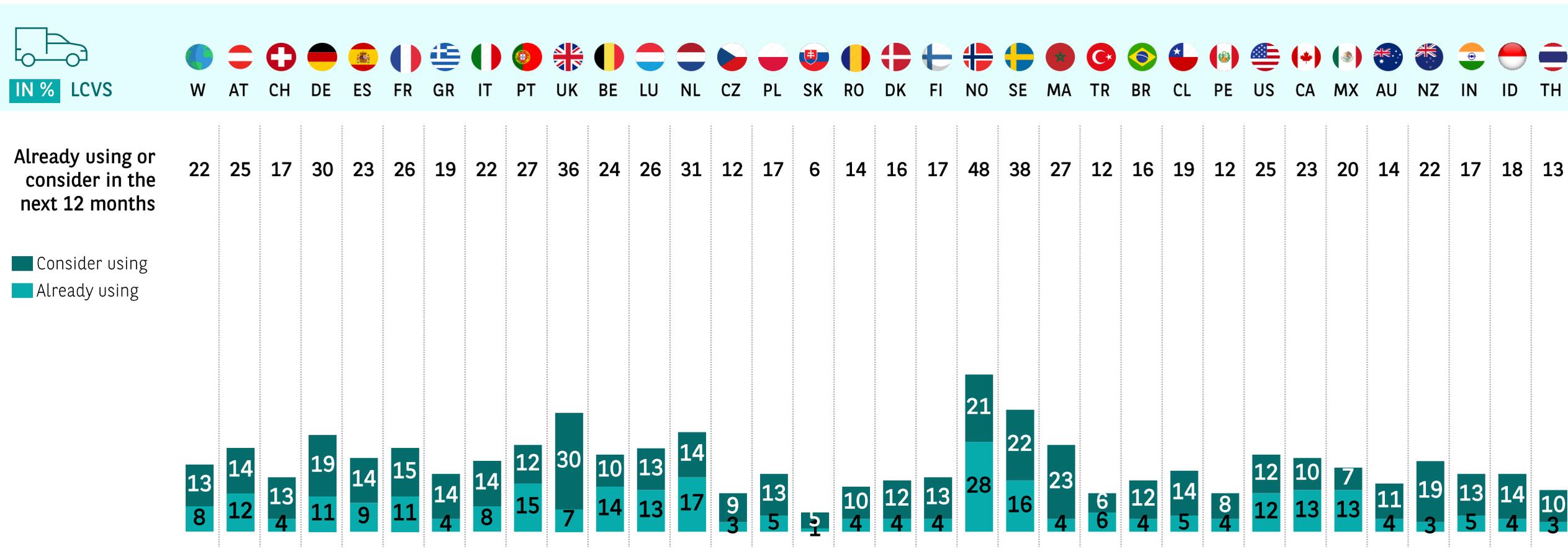
X% Significantly higher / lower vs. previous wave

# ELECTRIFIED VEHICLES TECHNOLOGIES USAGE

## FOCUS ON BEV

### HOW TO READ THE RESULTS ?

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

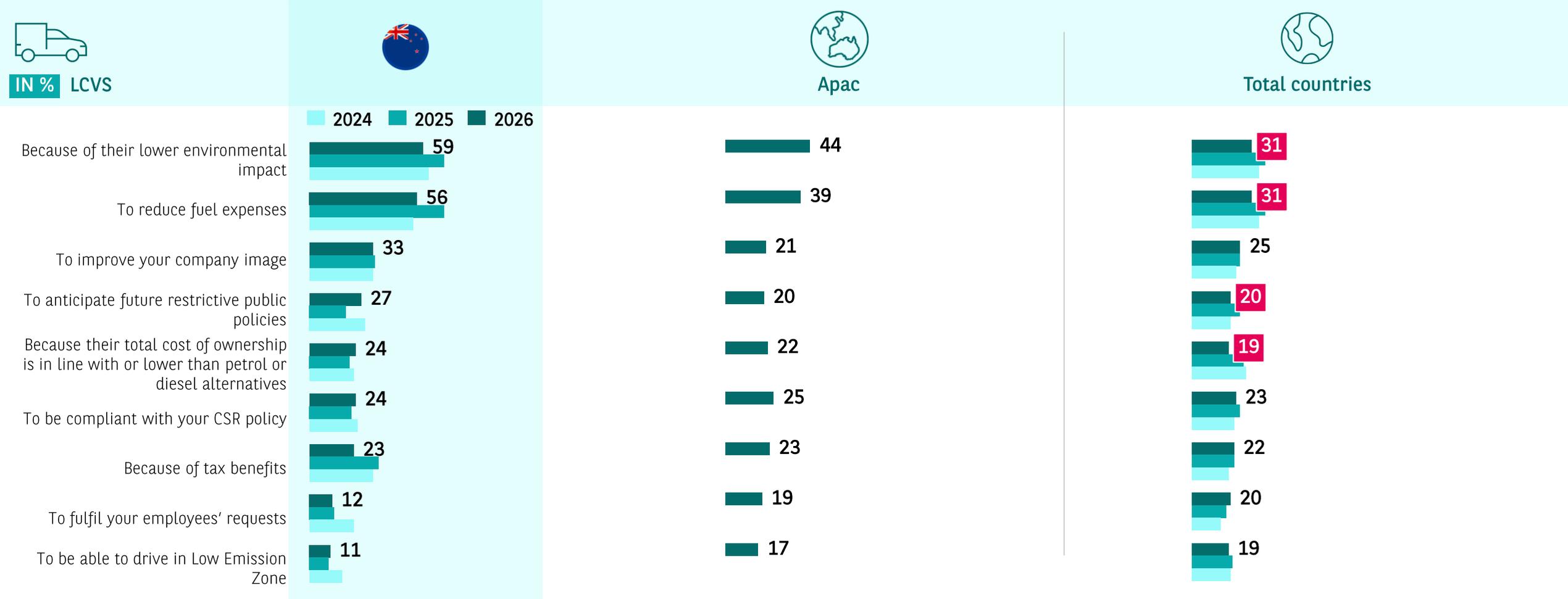


E28. Amongst the following electrified vehicles technologies, which ones do you currently use...?  
 E28bis. Amongst the following electrified vehicles technologies, which ones are you considering using...?  
 Basis: companies with LCVs

# REASONS FOR IMPLEMENTING ELECTRIFIED VEHICLES TECHNOLOGIES FOR LCVS

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 59% of the companies with LCVs are already using electrified vehicles technologies or are considering it Because of their lower environmental impact.



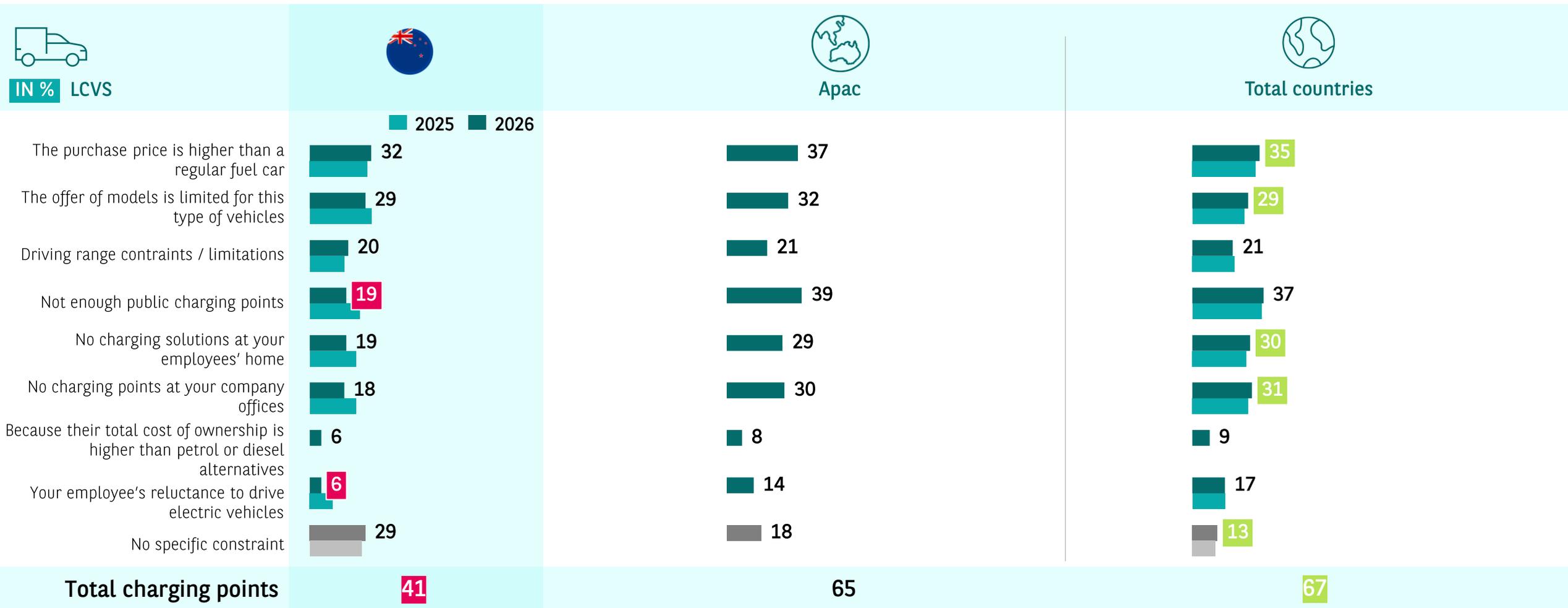
E28A. Why have you already implemented or why do you consider implementing these electrified vehicles technologies?  
Basis: companies that are already using or considering using electrified vehicles technologies for LCVs

X% Significantly higher / lower vs. previous wave

# CONSTRAINTS FOR USING ELECTRIC LIGHT COMMERCIAL VEHICLES

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 32% of the companies with LCVs declare that the main constraint for using electric LCVs is: The purchase price is higher than a regular fuel car. And 41% of the companies mention at least one reason related to charging points.



E28B\_2. What are the constraints of using electric light commercial vehicles (Battery Electric Vehicles)?  
Basis: companies with LCVs and aware of EV technology

X% Significantly higher/lower vs. previous wave

## HOW TO READ THE RESULTS ?

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

New question

**IN %** PC + LCVS

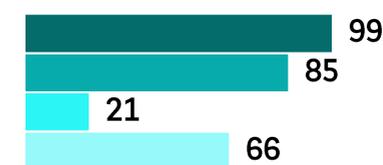
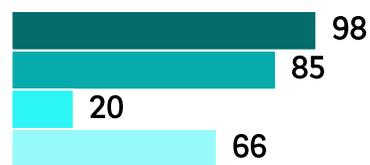
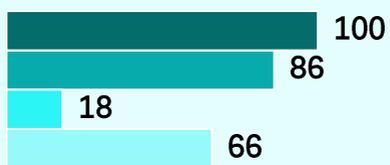
Apac

Total countries

### All vehicles

#### At least one charging policy

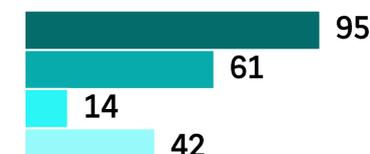
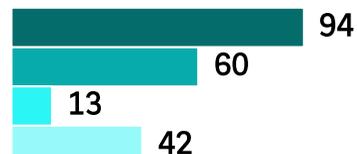
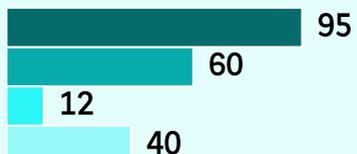
- At the company's premises
- At home
- Public charging



### Passenger cars

#### At least one charging policy

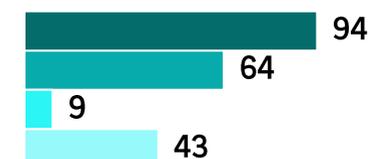
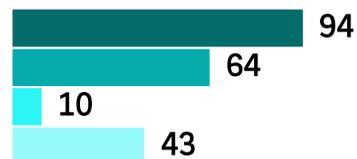
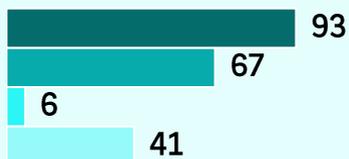
- At the company's premises
- At home
- Public charging



### LCV

#### At least one charging policy

- At the company's premises
- At home
- Public charging



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

Basis: companies with corporate vehicles = 100%

## HOW TO READ THE RESULTS ?

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

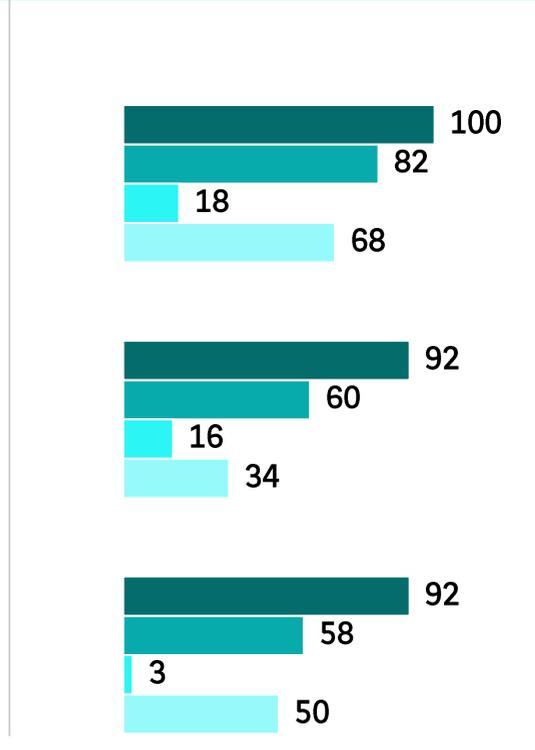
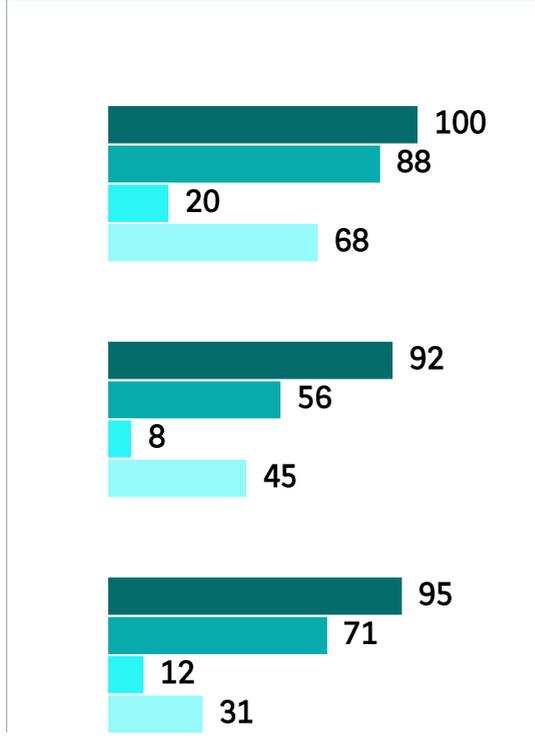
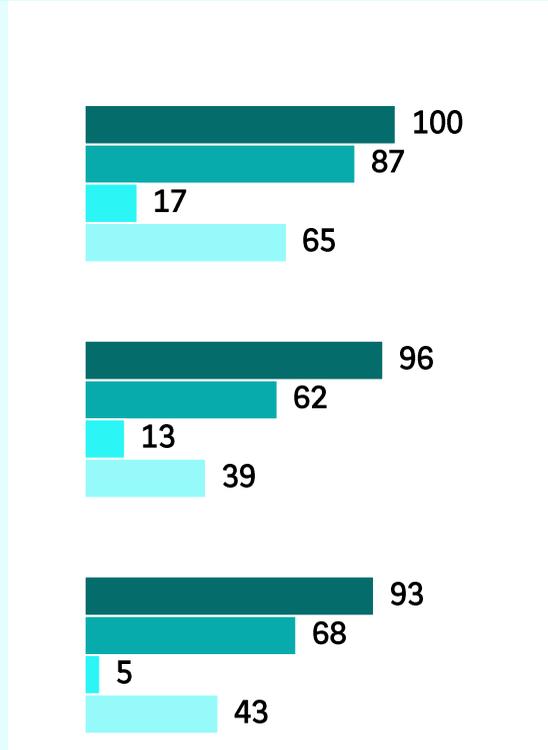
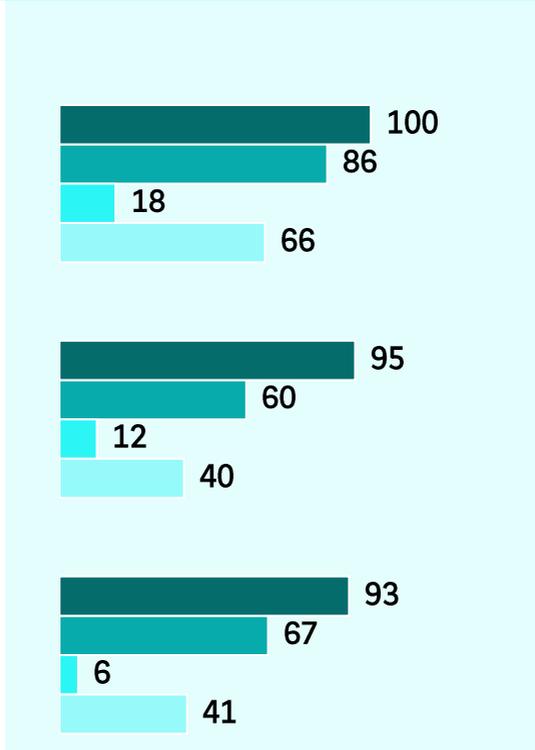
New question



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

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

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



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

## HOW TO READ THE RESULTS ?

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

New question



### All vehicles

	W	AT	CH	DE	ES	FR	GR	IT	PT	UK	BE	LU	NL	CZ	PL	SK	RO	DK	FI	NO	SE	MA	TR	BR	CL	PE	US	CA	MX	AU	NZ	IN	ID	TH
<b>At least one policy</b>	99	99	98	100	99	99	93	98	99	100	100	98	99	98	99	100	96	100	99	100	99	100	99	99	99	100	100	100	99	100	100	100	98	95
At the company's premises	85	83	82	85	83	86	79	82	85	89	87	86	85	86	89	86	81	88	88	84	84	86	83	83	84	81	88	85	84	86	86	88	85	80
At home	21	22	20	21	18	19	23	26	23	18	18	21	25	20	19	22	23	23	18	21	18	19	21	22	17	17	23	26	18	22	18	21	21	18
Public charging	66	67	65	73	69	63	62	64	64	69	70	65	66	60	66	67	68	63	63	68	60	64	66	65	60	69	69	62	71	67	66	69	64	65

### Passenger cars

<b>At least one policy</b>	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

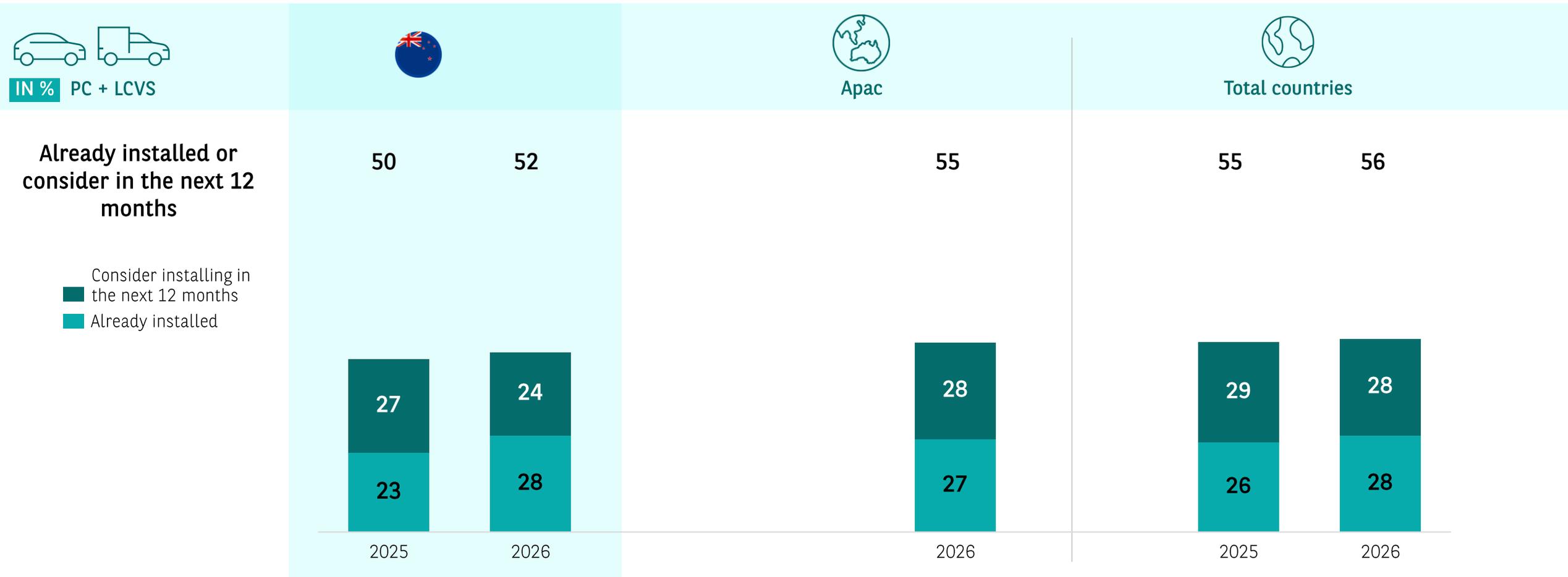
<b>At least one policy</b>	94	94	94	95	94	92	90	93	93	94	95	93	94	92	96	95	92	95	94	96	93	95	95	94	93	93	95	96	93	95	93	96	94	93
At the company's premises	64	64	58	61	62	63	63	61	65	67	70	66	68	69	67	64	62	72	61	61	65	66	61	68	62	61	65	66	60	64	67	66	64	61
At home	9	11	6	10	8	10	11	14	8	9	9	8	9	6	9	7	9	10	9	8	8	10	10	7	8	5	11	11	7	10	6	10	12	10
Public charging	43	46	46	53	48	41	41	42	40	42	47	42	35	36	41	45	45	37	43	46	41	41	41	39	39	50	45	42	48	41	41	45	41	46

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

# INSTALLATION OF CHARGING POINTS AT COMPANY'S PREMISES

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 52% of the companies that are using or considering charging at the company's premises have already installed charging points at the company's premises or are considering doing so in the next 12 months.



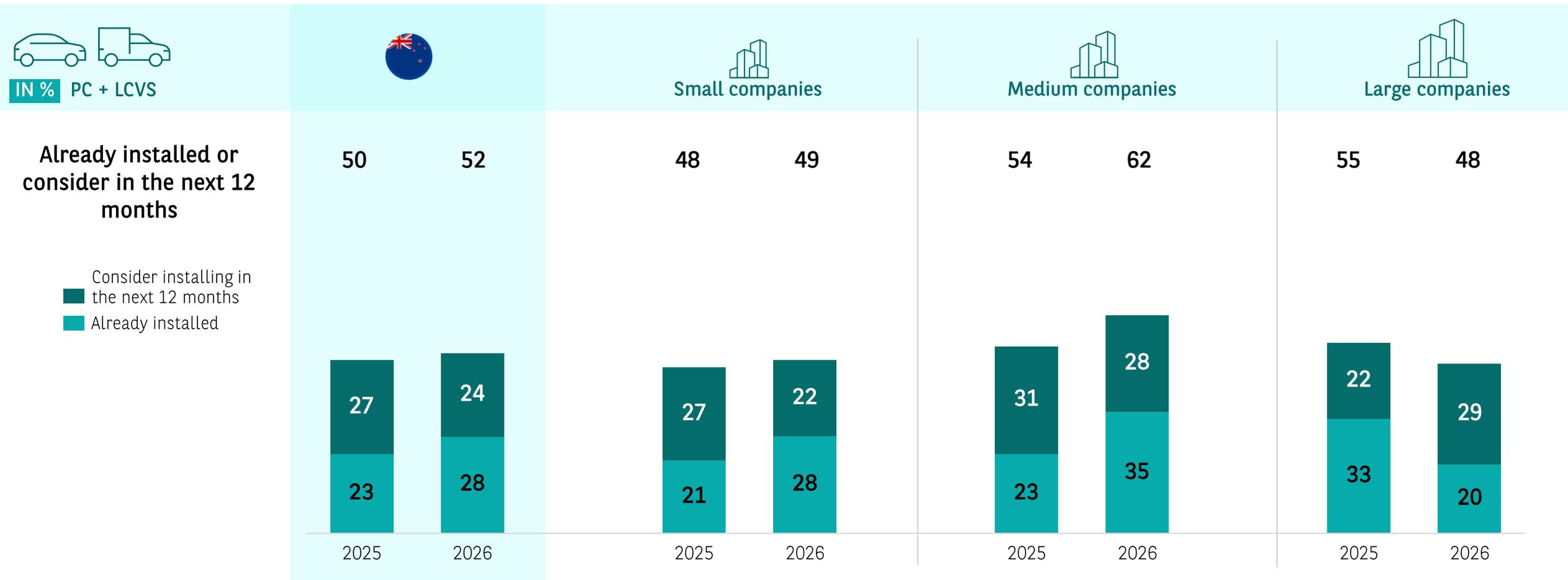
E32. Regarding charging at the company's premises, have you already installed charging points, or are you considering doing so in the next 12 months?  
Basis: companies that are using or considering charging at the company's premises for passenger car or LCVs

X% Significantly higher / lower vs. previous wave

# INSTALLATION OF CHARGING POINTS AT COMPANY'S PREMISES

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 52% of the companies that are using or considering charging at the company's premises have already installed charging points at the company's premises or are considering doing so in the next 12 months.



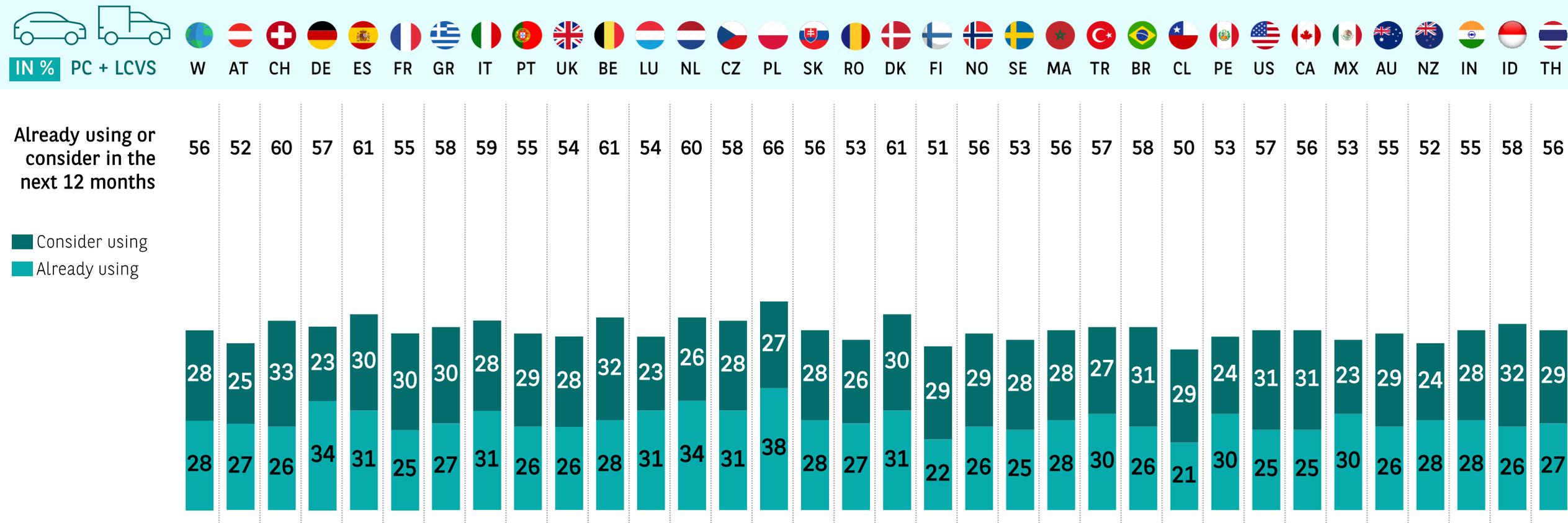
E32. Regarding charging at the company's premises, have you already installed charging points, or are you considering doing so in the next 12 months?  
Basis: companies that are using or considering charging at the company's premises for passenger car or LCVs

X% Significantly higher / lower vs. previous wave

# INSTALLATION OF CHARGING POINTS AT COMPANY'S PREMISES

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 52% of the companies that are using or considering charging at the company's premises have already installed charging points at the company's premises or are considering doing so in the next 12 months.



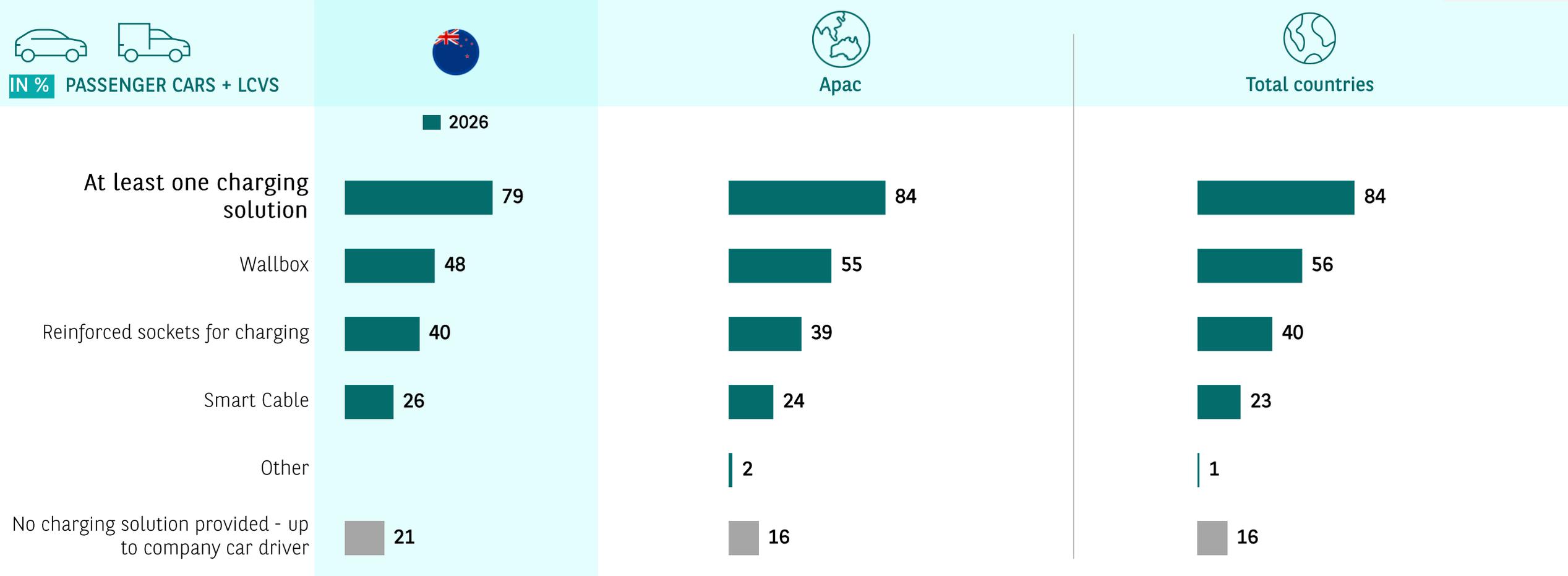
E32. Regarding charging at the company's premises, have you already installed charging points, or are you considering doing so in the next 12 months?  
 Basis: companies that are using or considering charging at the company's premises for passenger car or LCVs

# TYPE OF HOME CHARGING POINTS

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 79% of the companies that are using or considering home charging offer or plan to offer at least one charging solution to company drivers.

New question



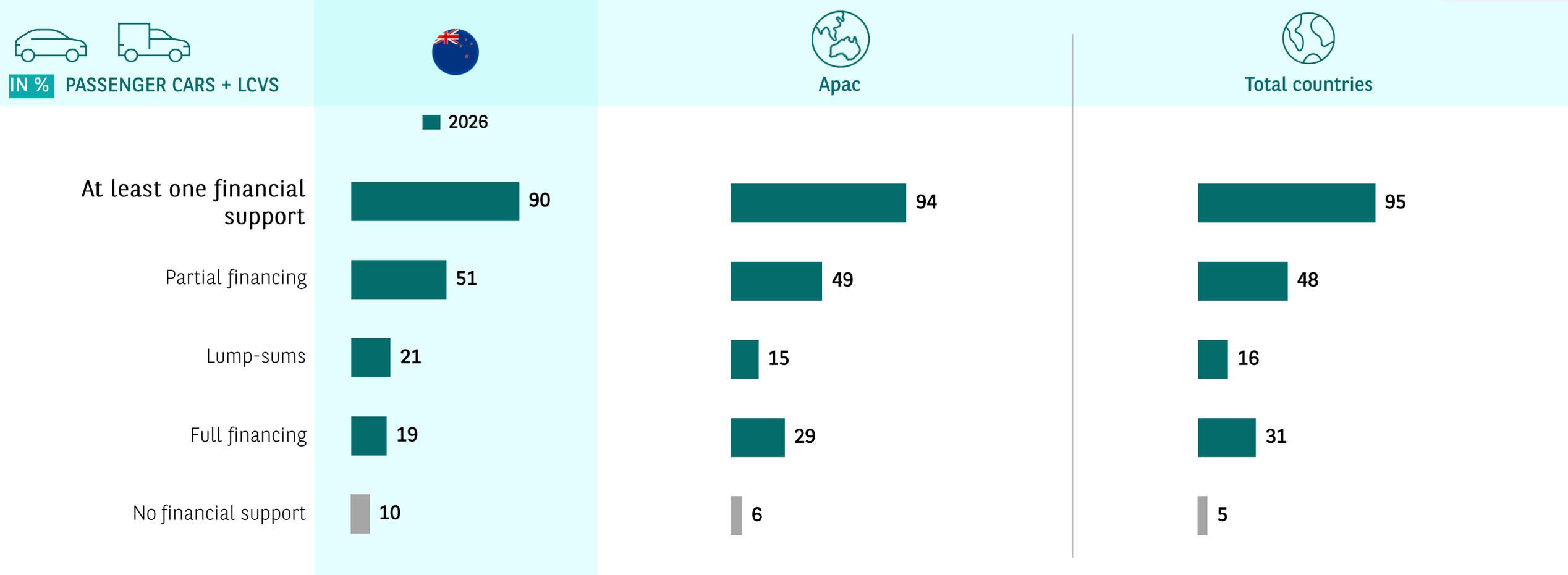
E34.NEW. Regarding home charging, what kind of home charging solutions does your company offer or plan to offer for the company car drivers?  
Basis: companies that are using or considering home charging for passenger car or LCVs

# TYPE OF FINANCIAL SUPPORT FOR HOME CHARGING POINTS

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 90% of the companies that offer or plan to offer at least one charging solution to company drivers, provide at least one solution to support the provision of home charging solutions to company car drivers or plans to do so in the next 12 months.

New question



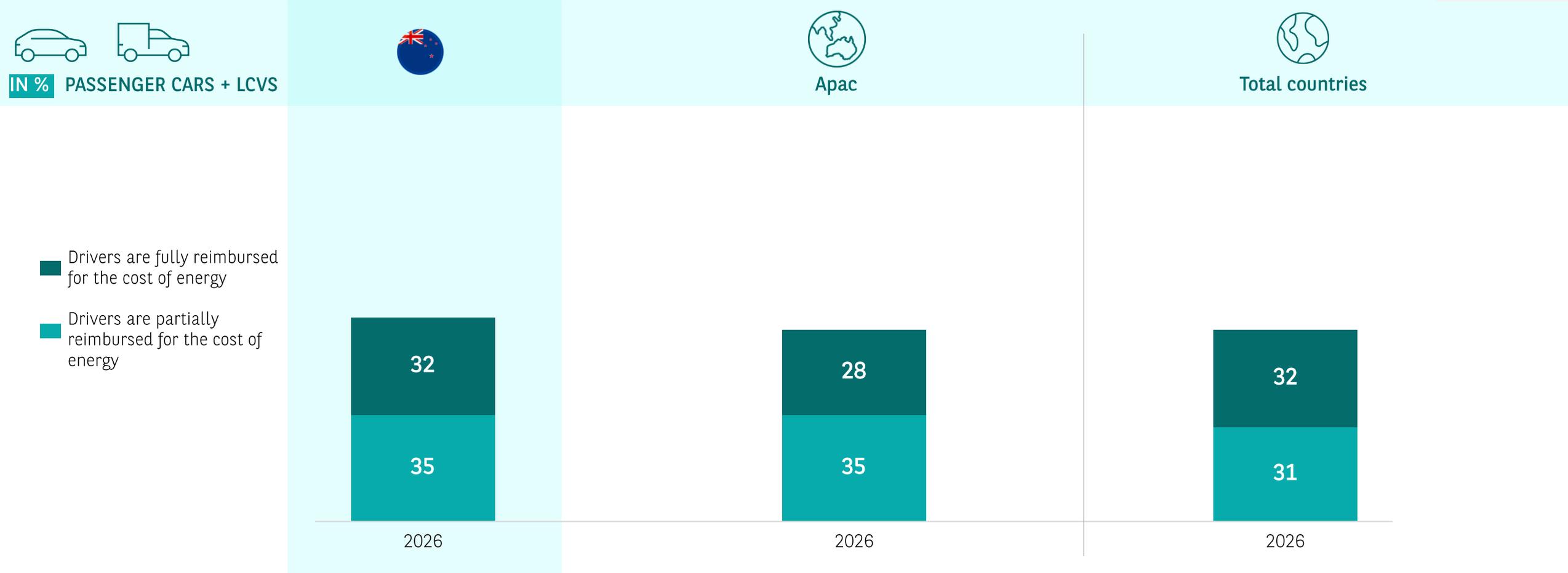
E35.NEW. How does your company financially support the provision of home charging solutions to company car drivers, or plans to do so in the next 12 months?  
Basis: companies that offer or plan to offer at least one charging solution to company drivers

# COST MANAGEMENT OF HOME CHARGING POINTS

## HOW TO READ THE RESULTS ?

In New Zealand 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



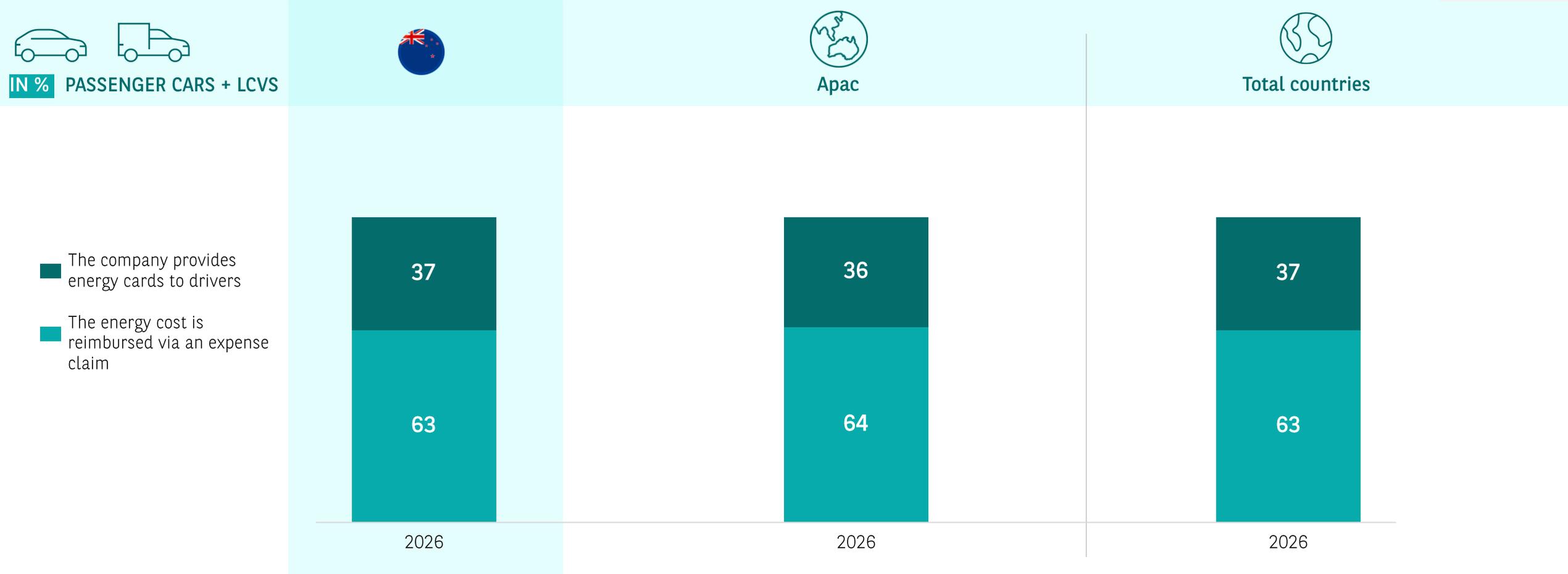
E36. How do you manage or plan to manage the energy costs of home charging for company car drivers?  
Basis: companies that are already financially supporting or are considering financially supporting home charging points

# PUBLIC CHARGING COST

## HOW TO READ THE RESULTS ?

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

New question



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

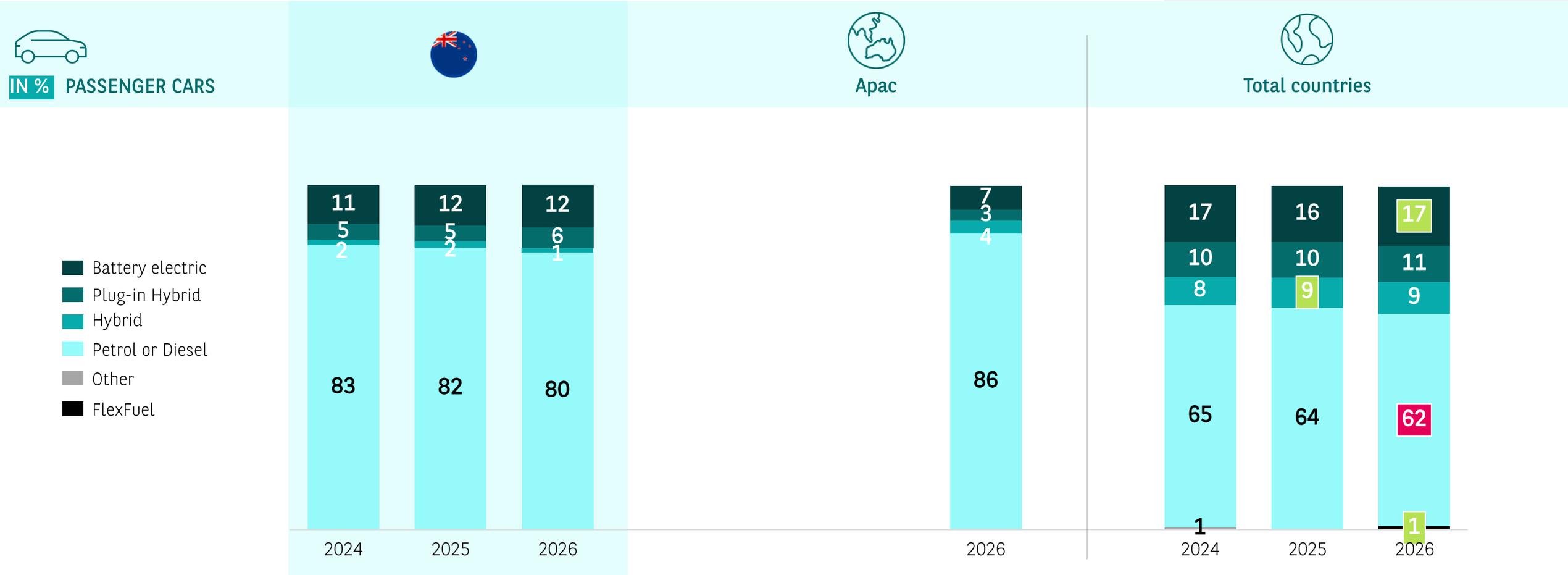
# EXPECTED FLEET SHARE PER ENERGY

## FOCUS ON PASSENGER CARS

### HOW TO READ THE RESULTS ?

In New Zealand in 3 years, 12% of the passenger car fleet is expected to be BEV.

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



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

X% Significantly higher / lower vs. previous wave

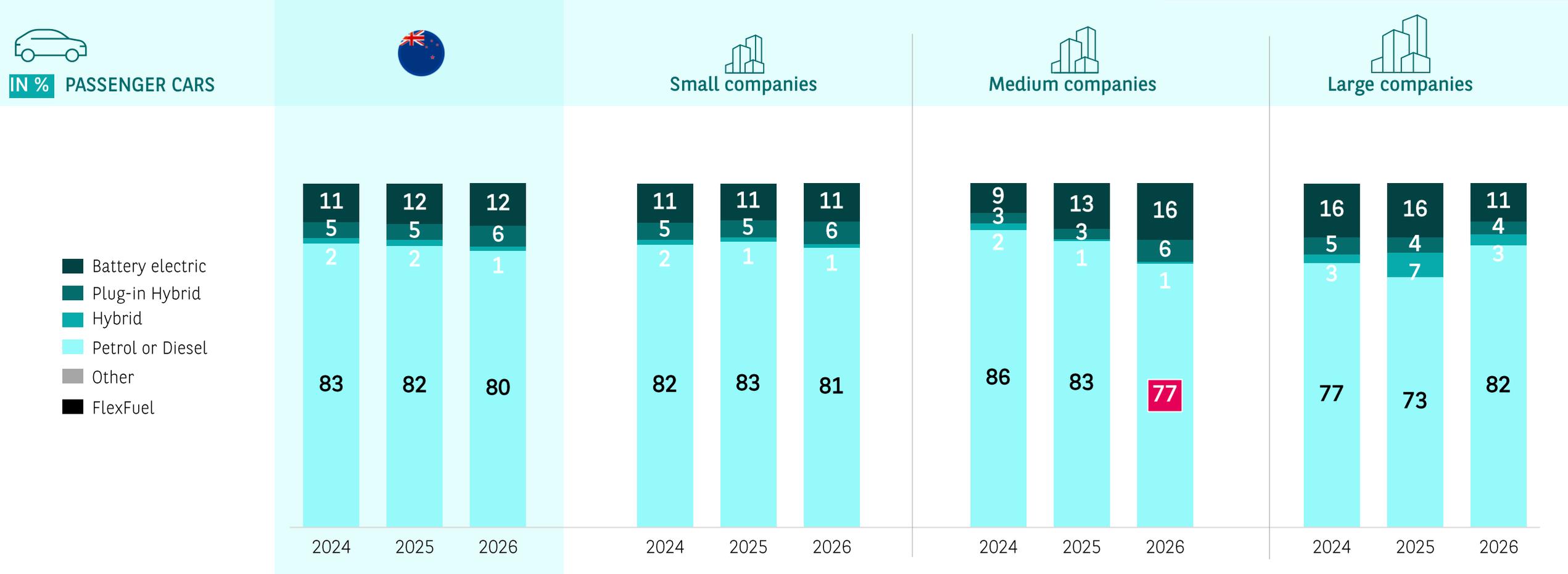
# EXPECTED FLEET SHARE PER ENERGY

## FOCUS ON PASSENGER CARS

### HOW TO READ THE RESULTS ?

In New Zealand in 3 years, 12% of the passenger car fleet is expected to be BEV.

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



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

X% Significantly higher / lower vs. previous wave

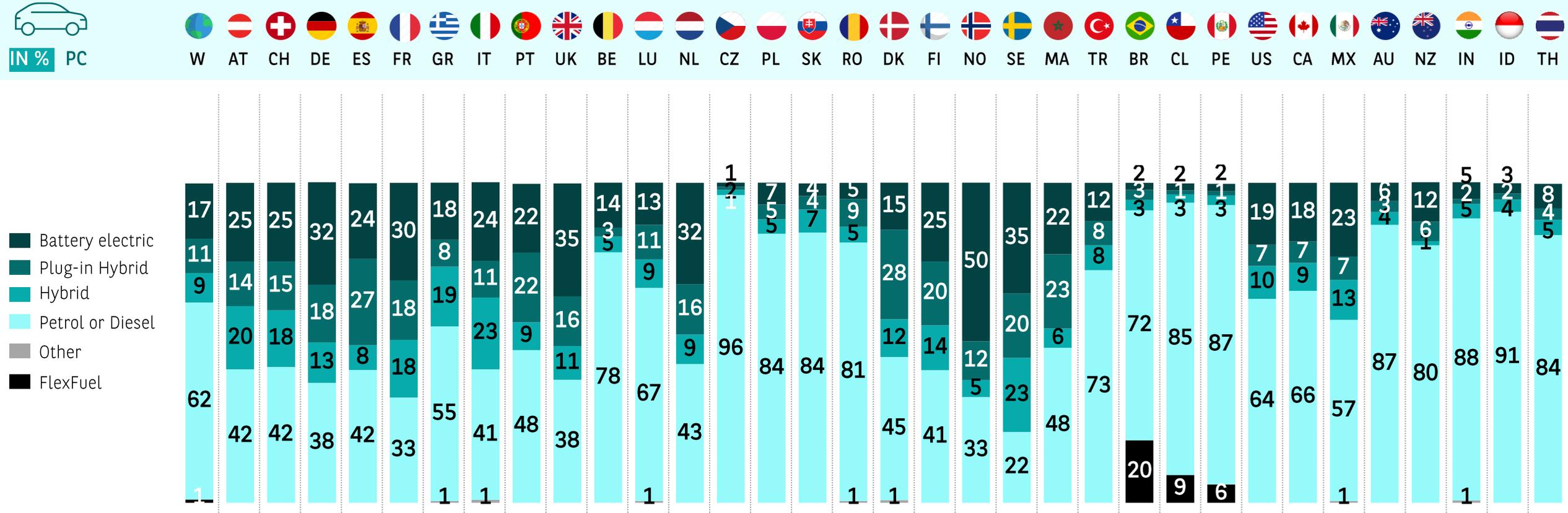
# EXPECTED FLEET SHARE PER ENERGY

## FOCUS ON PASSENGER CARS

### HOW TO READ THE RESULTS ?

In New Zealand in 3 years, 12% of the passenger car fleet is expected to be BEV.

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



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

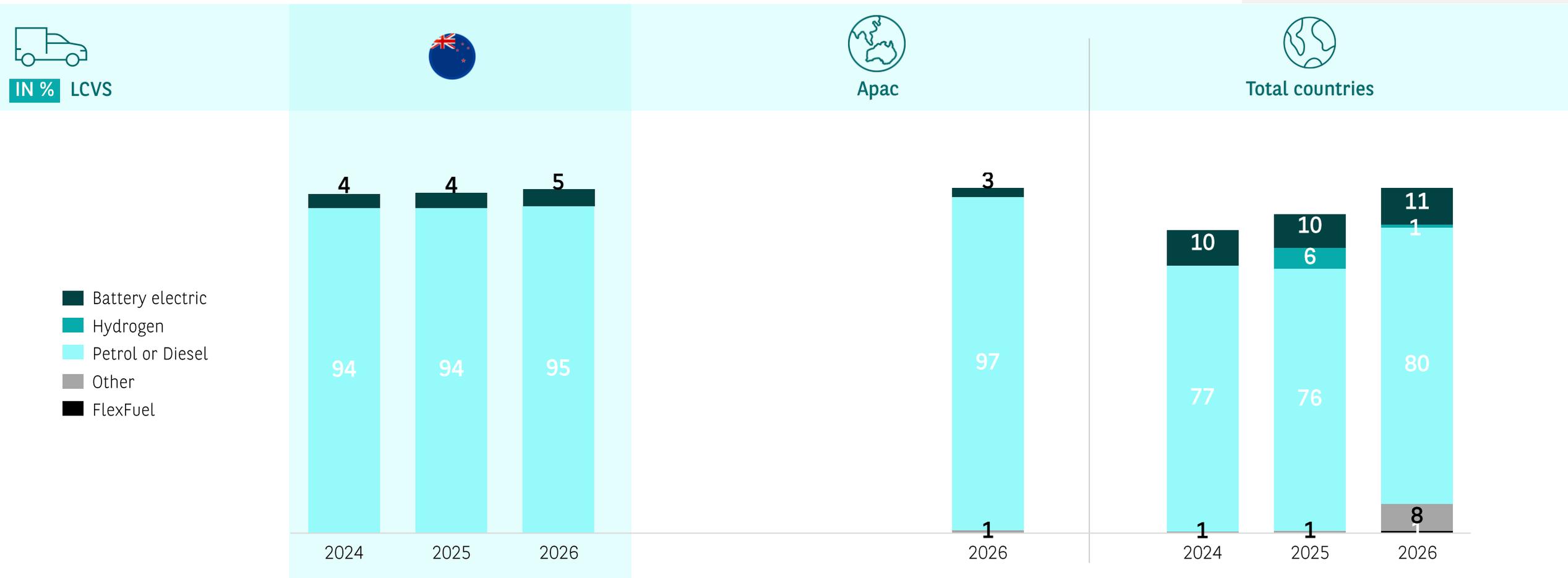
# EXPECTED FLEET SHARE PER ENERGY

## FOCUS ON LCVs

### HOW TO READ THE RESULTS ?

In New Zealand in 3 years, 5% of the LCV fleet is expected to be BEV.

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



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

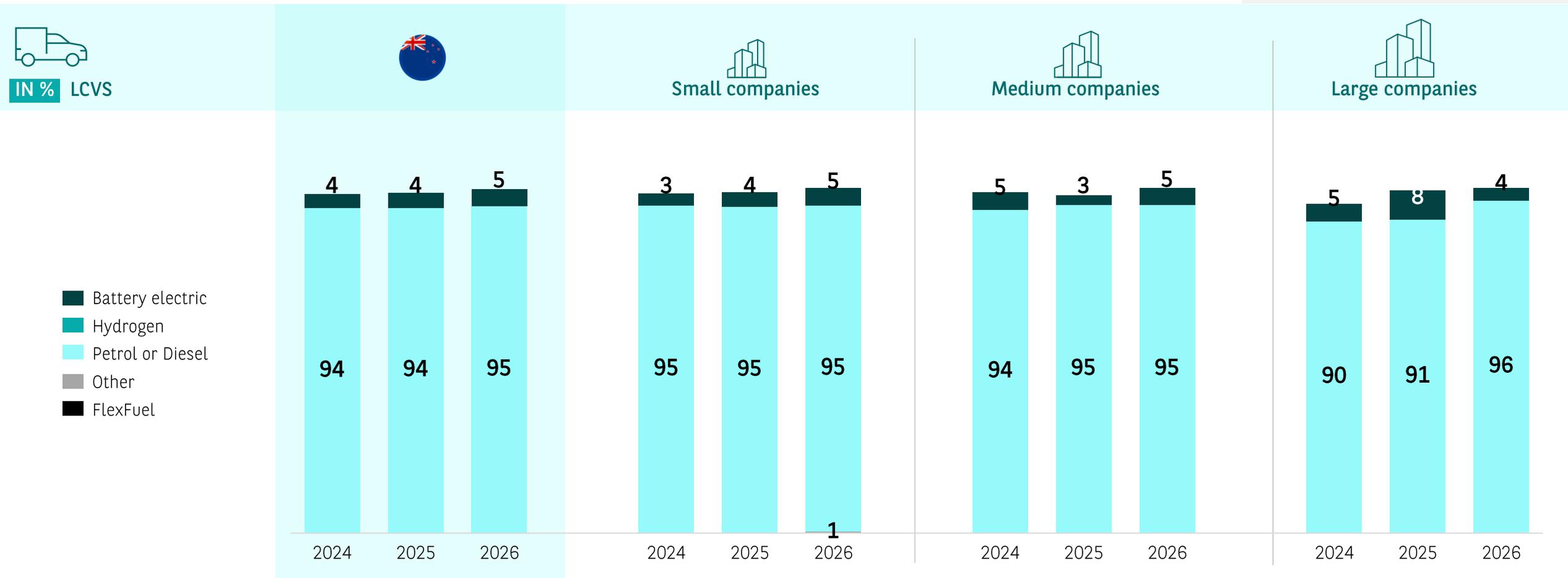
# EXPECTED FLEET SHARE PER ENERGY

## FOCUS ON LCVs

### HOW TO READ THE RESULTS ?

In New Zealand in 3 years, 5% of the LCV fleet is expected to be BEV.

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



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

# EXPECTED FLEET SHARE PER ENERGY

## FOCUS ON LCVs

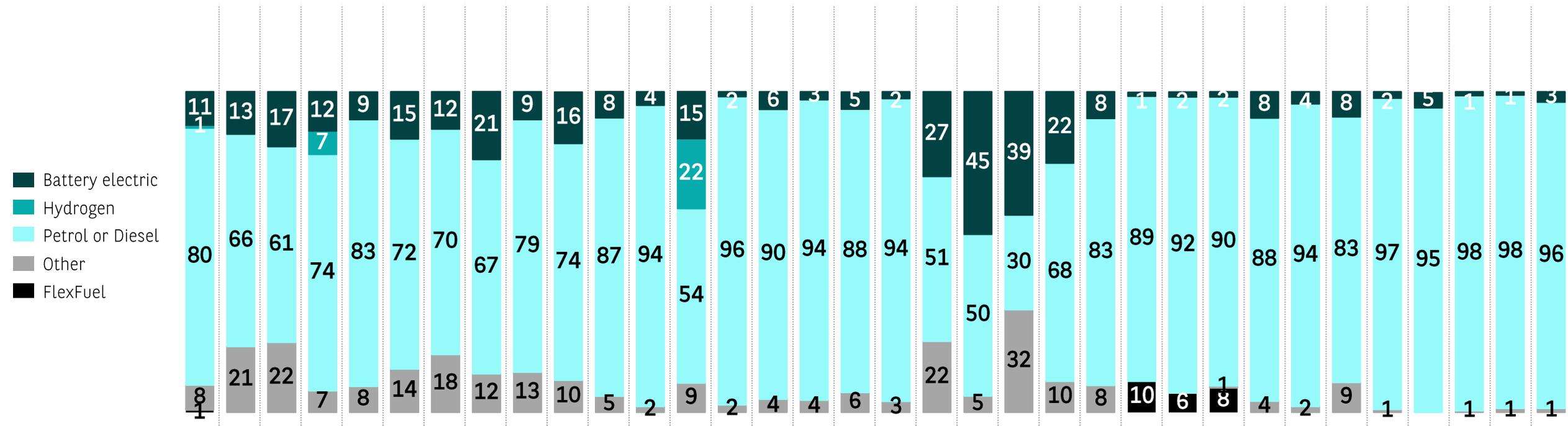
### HOW TO READ THE RESULTS ?

In New Zealand in 3 years, 5% of the LCV fleet is expected to be BEV.

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



IN % LCVs



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

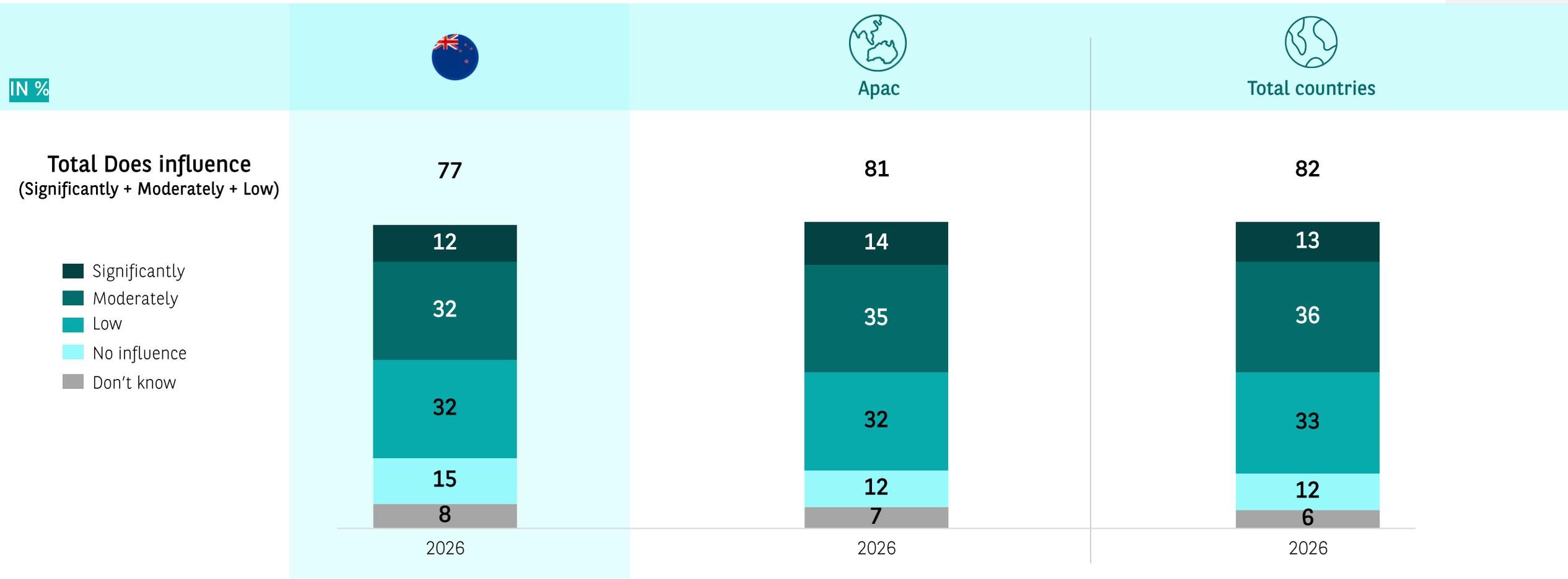


# INFLUENCE OF LEASING PROVIDER ON ENERGY MIX CHOICES

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 77% 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, 77% of the companies financing their vehicles with Operational leasing or Financial leasing declare that their leasing provider influence their decision to move from a thermic vehicle to an electric vehicle.

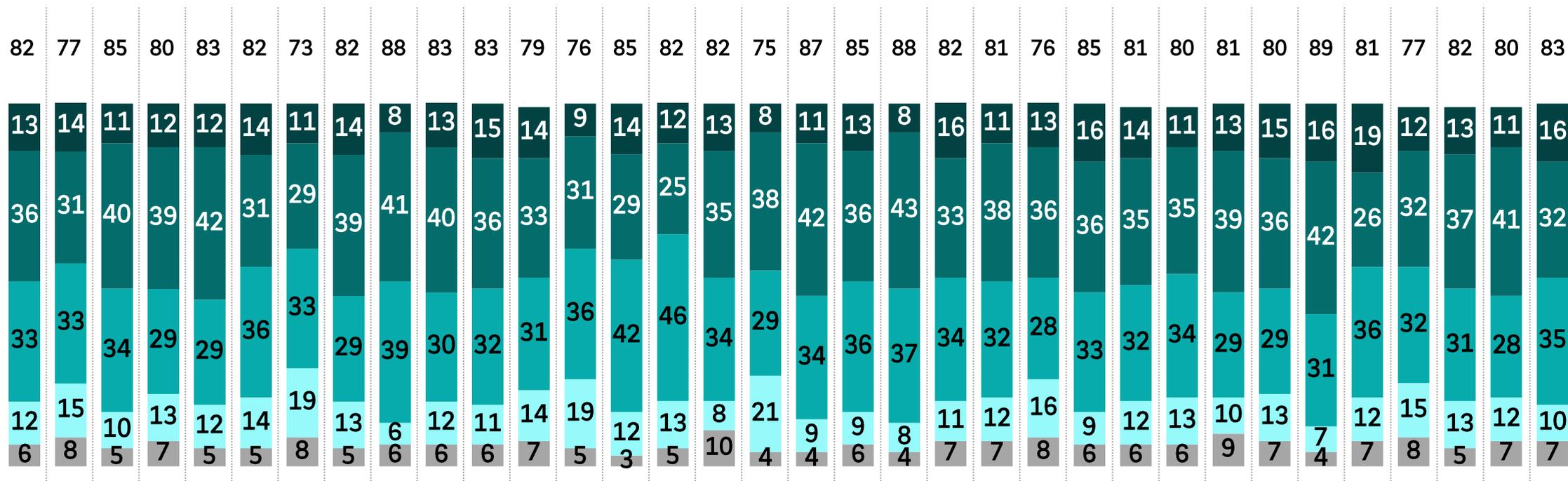
New question

IN %



**Total Does influence**  
(Significantly + Moderately + Low)

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



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

# MAIN REASONS TO START ORDERING MORE BEV

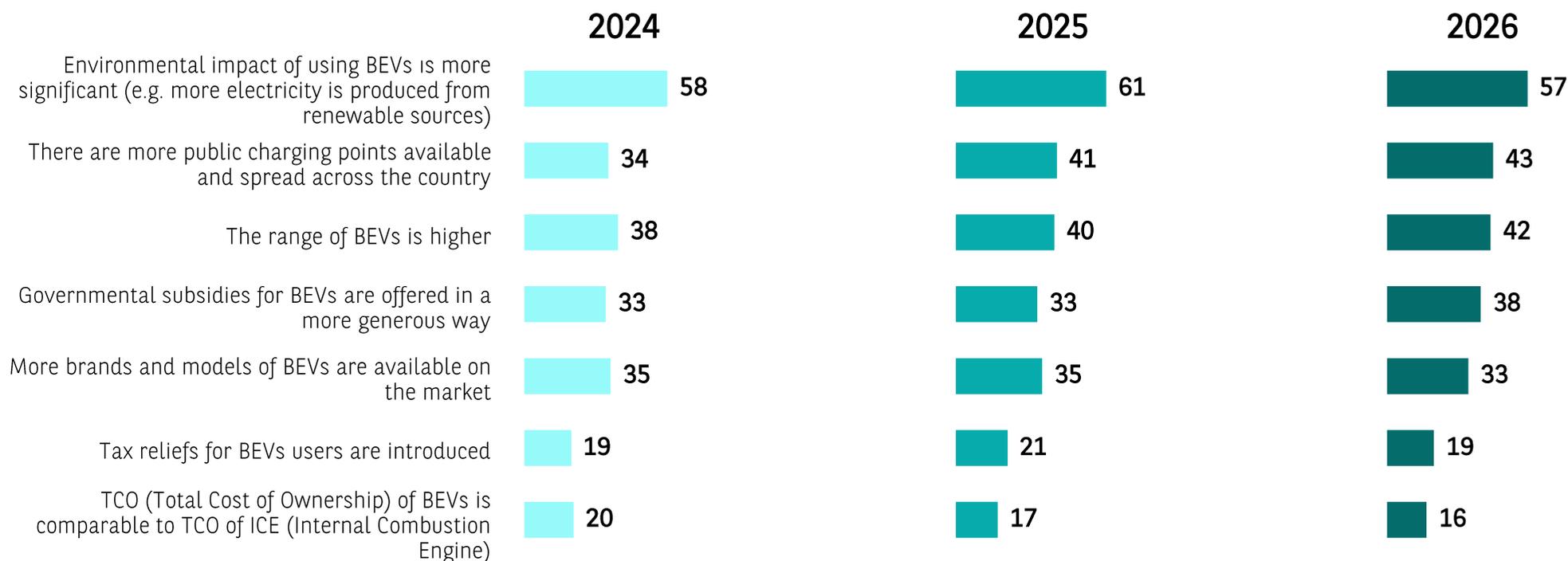
## HOW TO READ THE RESULTS ?

In 2026, 57% of the companies that are already using or considering BEV for passenger cars or LCV declare that the main reason to start ordering more BEV is: Environmental impact of using BEVs is more significant (e.g. more electricity is produced from renewable sources).



Local question

IN % PASSENGER CARS + LCVS



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

X% Significantly higher / lower vs. previous wave

## HOW TO READ THE RESULTS ?

In 2026, 32% of the companies that are already using or considering BEV/PHEV for passenger cars or LCV have expanded the car policy for electric vehicles in terms of brand selection.



Local question

IN % PASSENGER CARS + LCVS

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



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

X% Significantly higher / lower vs. previous wave

# 04

## CONNECTED FLEETS

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



## Telematics adoption in New Zealand is stable

27% of companies have connected vehicles for all or part of their fleet, which is lower than the APAC average of 38%. This level of adoption is consistent across company sizes and vehicle types.

## Currently cautious data usage, yet promising long-term potential

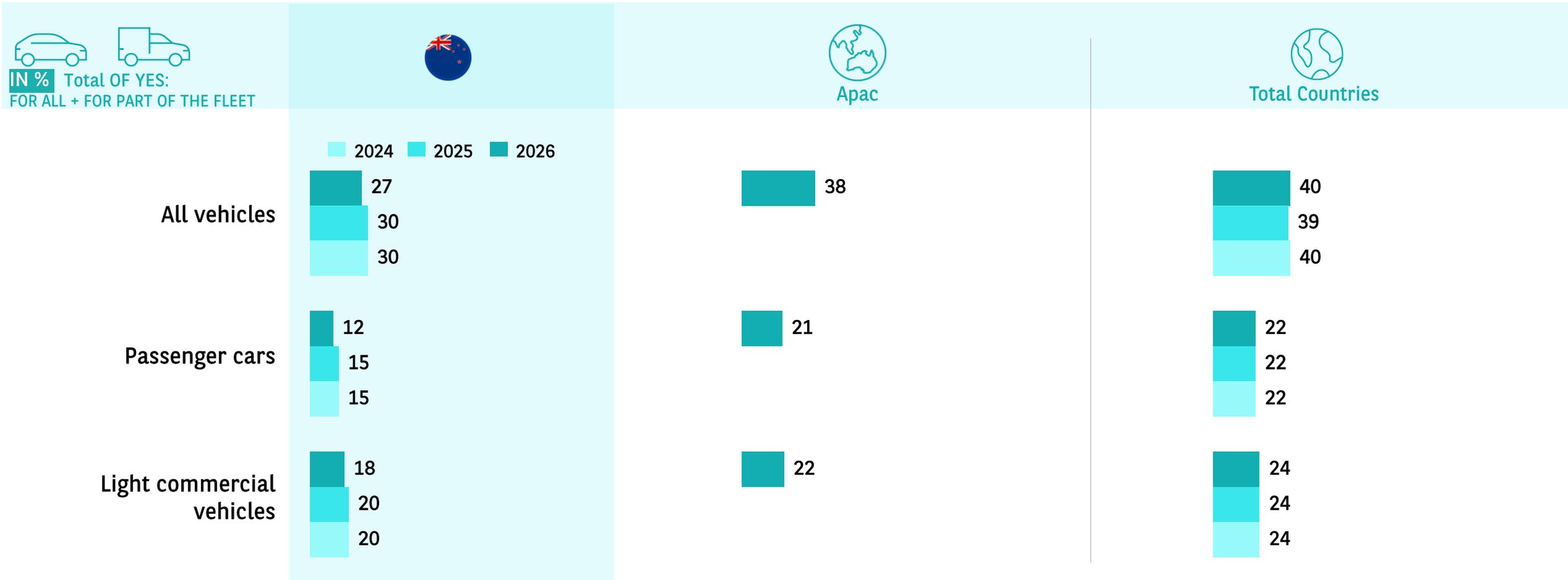
16% of the companies in New Zealand are using the data from telematics platforms and a significant 47% of companies are considering leveraging these data, compared to 53% of companies of the APAC average.

# PROPORTION OF COMPANIES USING CONNECTED VEHICLES

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 27% of the companies have connected vehicles for all or part of their fleet.

12% have connected passenger cars and 18% have connected LCVs.



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

X% Significantly higher / lower vs. previous wave

# PROPORTION OF COMPANIES USING CONNECTED VEHICLES

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 27% of the companies have connected vehicles for all or part of their fleet. 12% have connected passenger cars and 18% have connected LCVs.



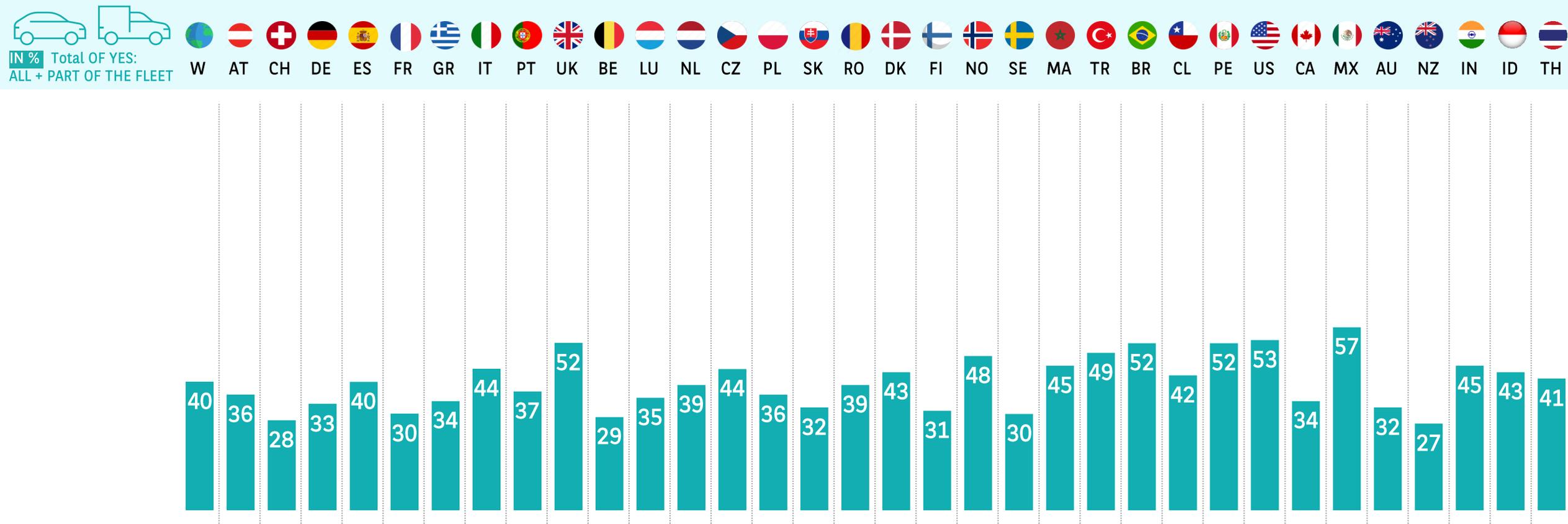
E23c. Is your fleet connected thanks to a telematic tool?  
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

# PROPORTION OF COMPANIES USING CONNECTED VEHICLES

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 27% of the companies have connected vehicles for all or part of their fleet.

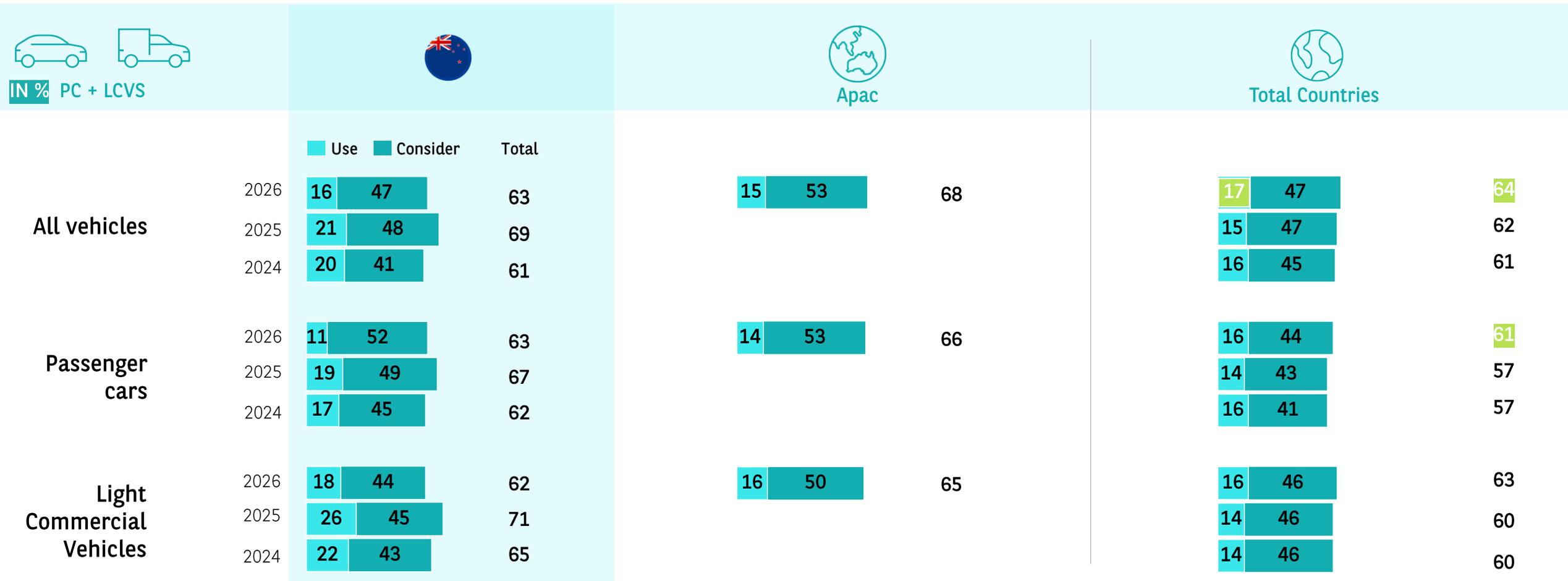


E23c. Is your fleet connected thanks to a telematic tool?  
Basis: companies with corporate vehicles = 100%

# PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 63% of the companies with connected vehicles are already using the data coming from the vehicle box thanks to a telematics platform or are considering doing so in the next 3 years.



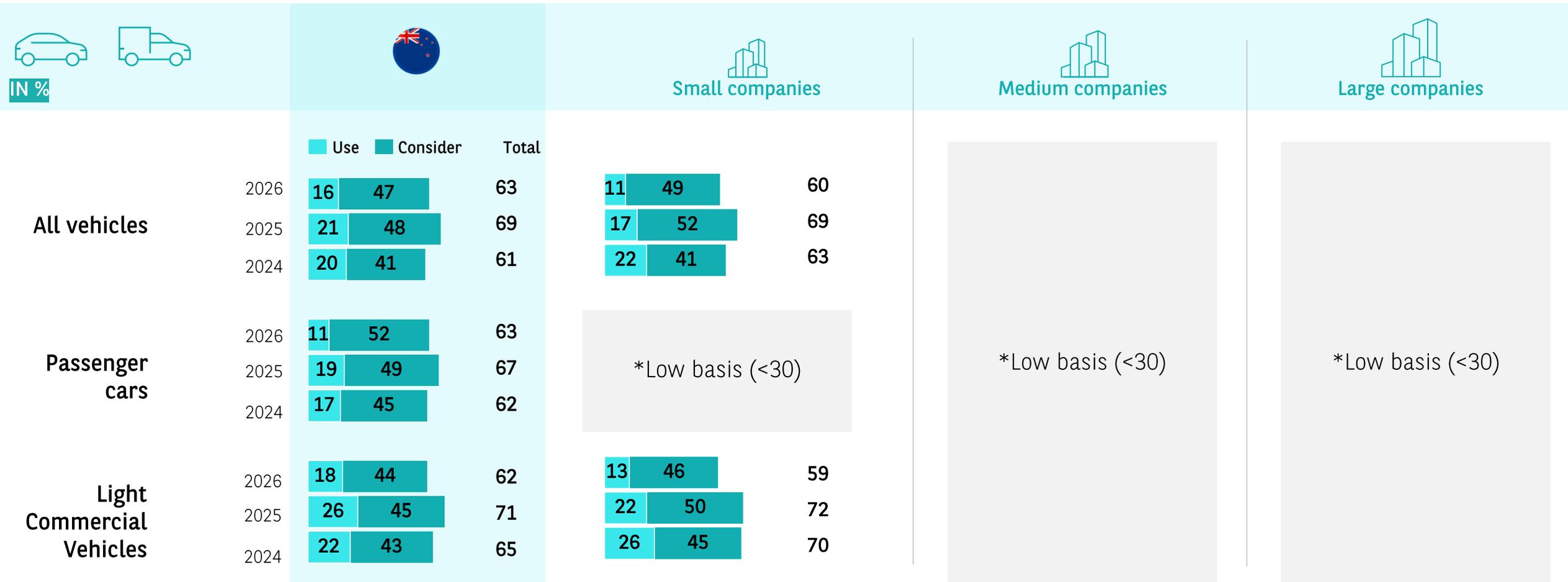
E23d. Do you use or consider using the data coming from the vehicle box thanks to a telematics platform ?  
Basis: companies with connected vehicles thanks to a telematic tool

X% Significantly higher / lower vs. previous wave

# PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 63% of the companies with connected vehicles are already using the data coming from the vehicle box thanks to a telematics platform or are considering doing so in the next 3 years.



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

X% Significantly higher / lower vs. previous wave

# PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

## HOW TO READ THE RESULTS ?

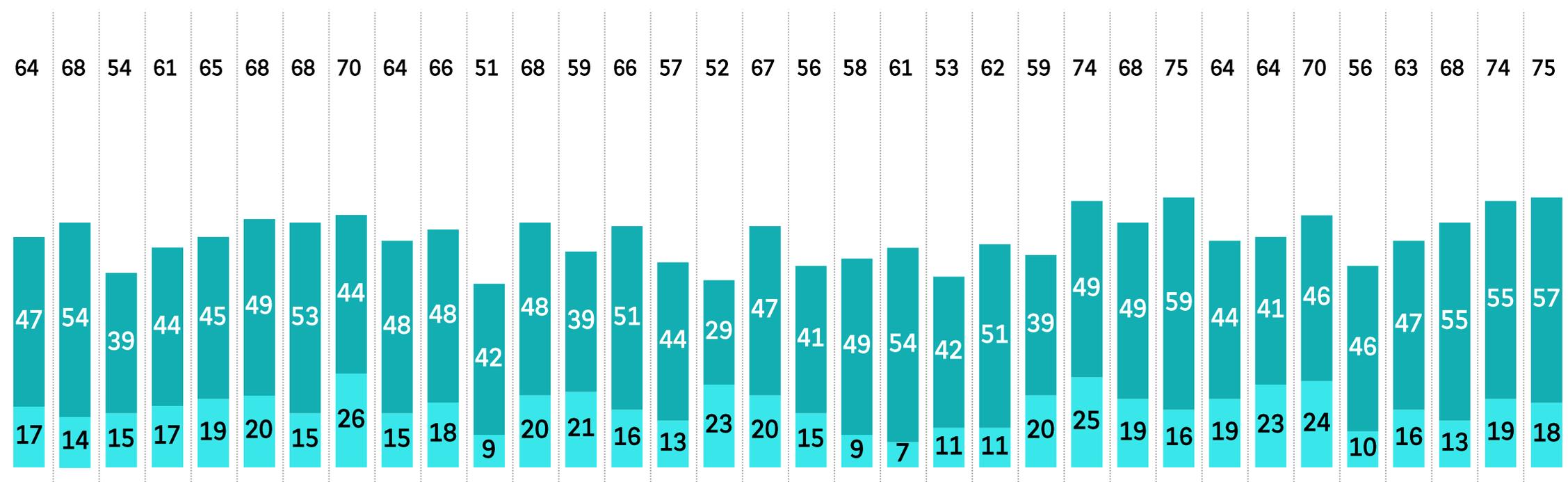
In New Zealand in 2026, 63% of the companies with connected vehicles are already using the data coming from the vehicle box thanks to a telematics platform or are considering doing so in the next 3 years.



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

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

# 05

## EMPLOYEE MOBILITY

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



## New Zealand shows sustained commitment to advancing corporate mobility

95% of companies in New Zealand have implemented or plan to implement at least one mobility policy or solution, aligning with the APAC average and being consistent across various company sizes.

## Personal vehicle reimbursements, short- or mid-term rentals, and car or cash allowances make up the core mobility solutions

Personal vehicle expense reimbursement leads mobility policies with 40% of companies using or considering it. Short- or mid-term vehicle rentals (38%) and car or cash allowances (34%) are other top mobility policies implemented or considered.

Ride-sharing is the most utilized or considered mobility solution, with 33% usage or consideration.

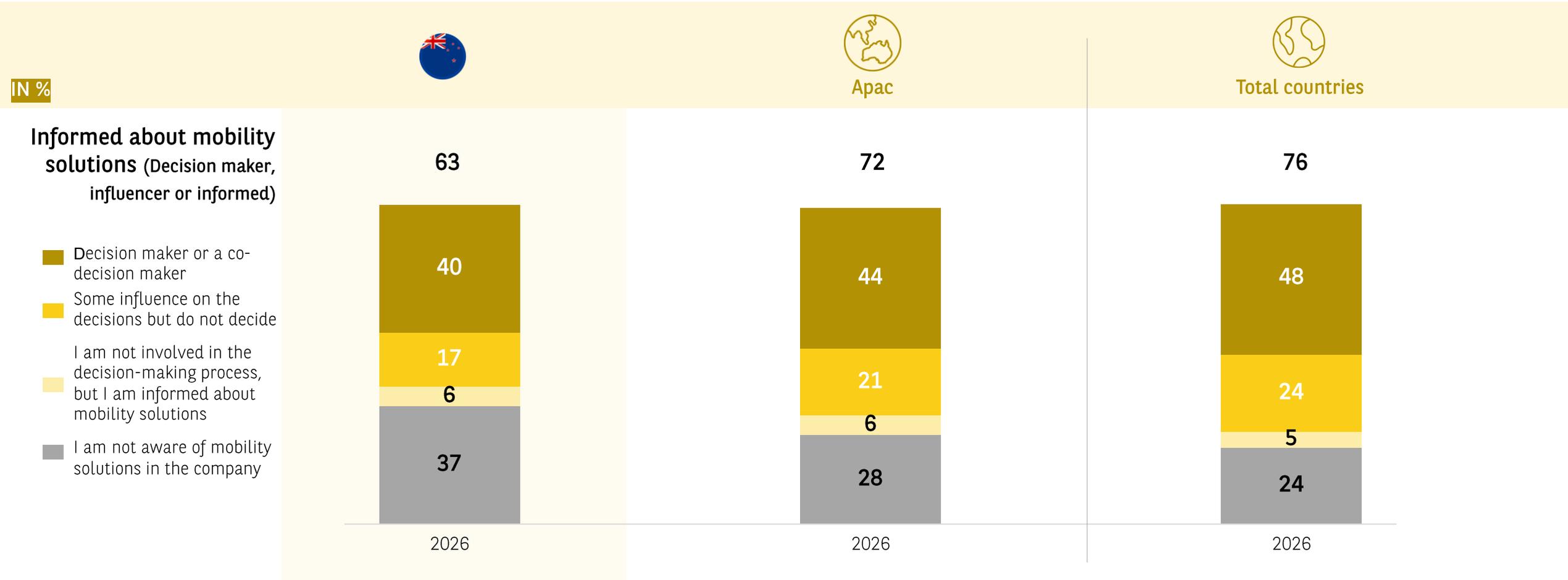
## HR priorities are steering the development of corporate mobility solutions

34% of New Zealand companies are developing corporate mobility programs to meet specific employee requests, while another 33% cite HR needs as motivating factors.

# RESPONDENTS' INVOLVEMENT IN MOBILITY SOLUTION DECISIONS

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 63% 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...)?

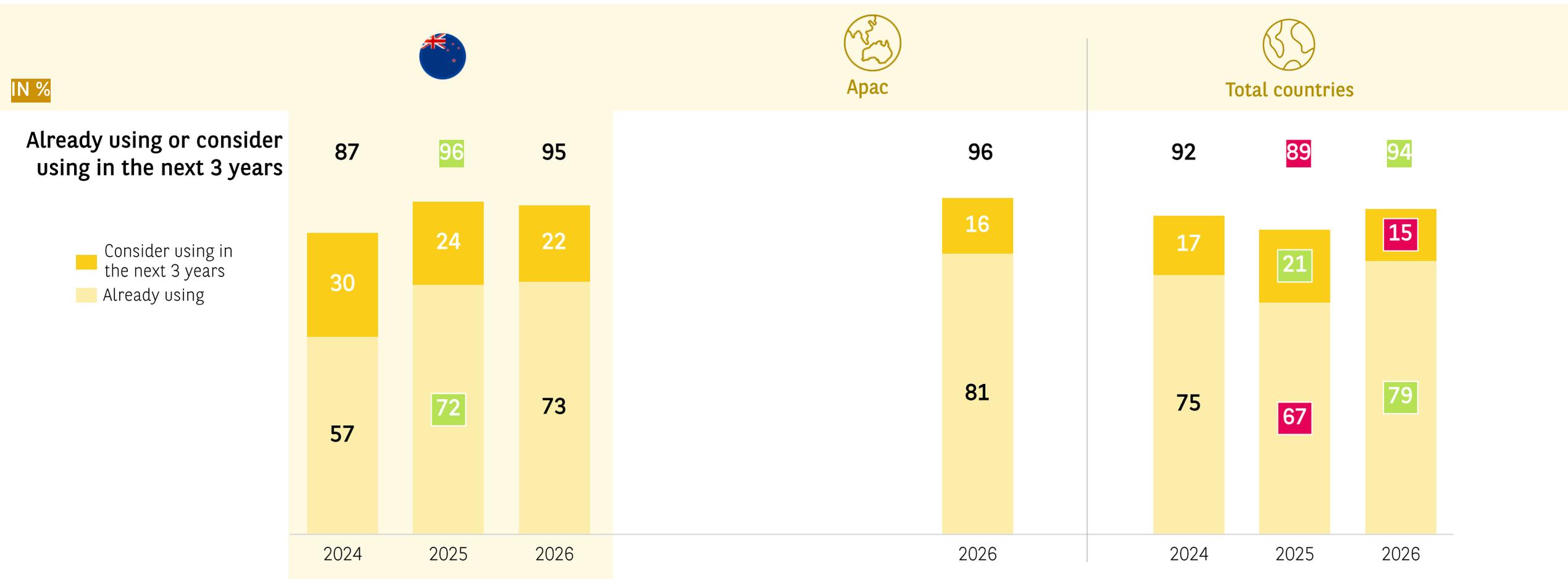
Basis: companies with corporate vehicles = 100%

# MOBILITY POLICIES AND SOLUTIONS IMPLEMENTATION

## AT LEAST ONE MOBILITY POLICY AND SOLUTION

### HOW TO READ THE RESULTS ?

Overall in New Zealand in 2026, 95% of the companies are already using at least one mobility policy or solution or are considering doing so in the next 3 years.



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

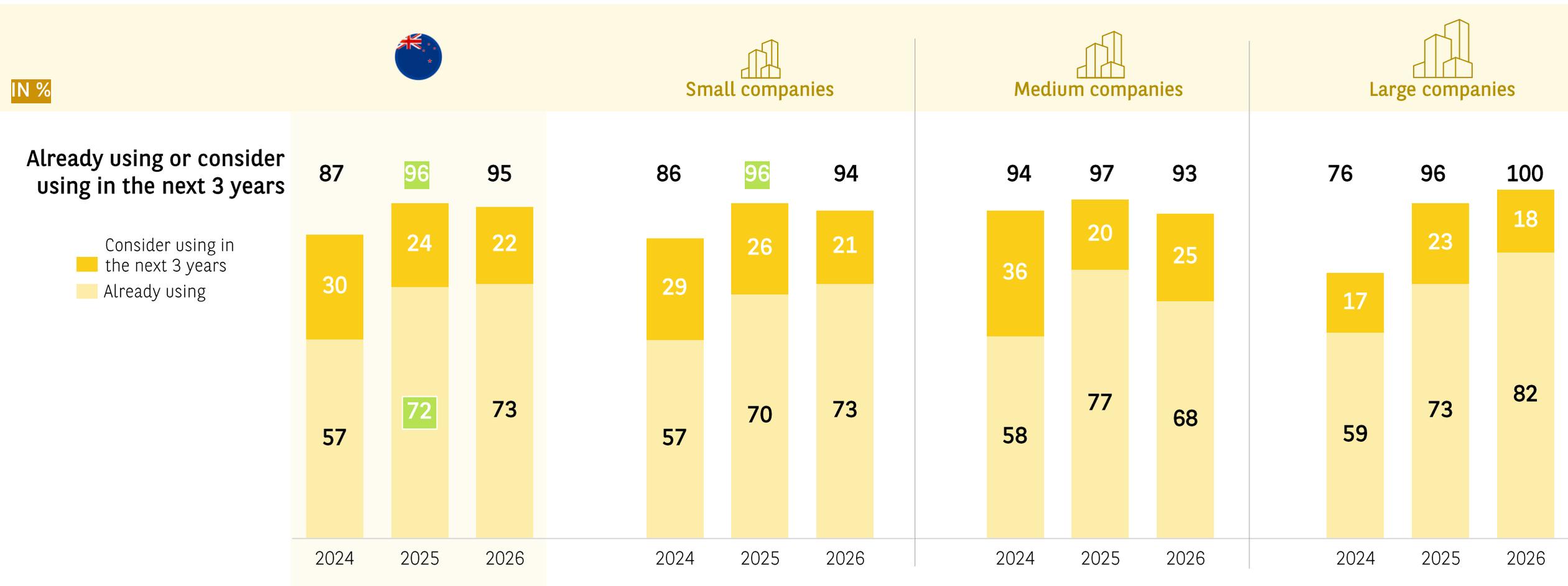
X% Significantly higher / lower vs. previous wave

# MOBILITY POLICIES AND SOLUTIONS IMPLEMENTATION

## AT LEAST ONE MOBILITY POLICY AND SOLUTION

### HOW TO READ THE RESULTS ?

In New Zealand in 2026, 95% of the companies are already using at least one mobility policy or solution or are considering doing so in the next 3 years.



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

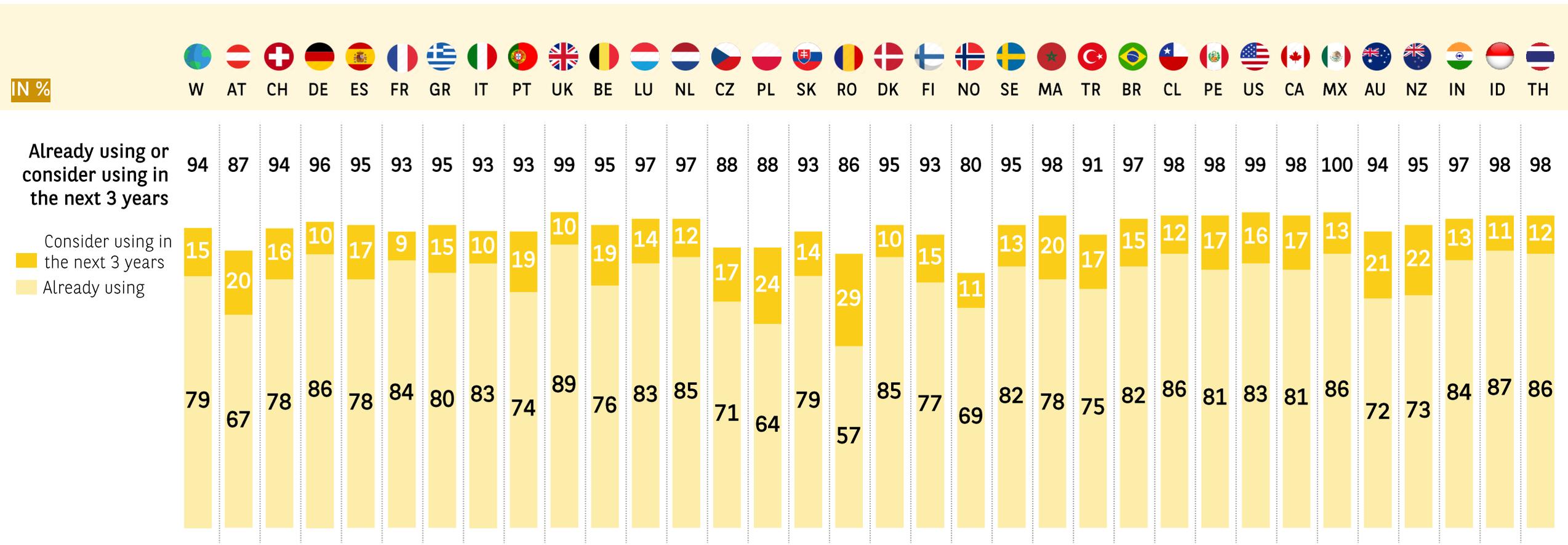
X% Significantly higher / lower vs. previous wave

# MOBILITY POLICIES AND SOLUTIONS IMPLEMENTATION

## AT LEAST ONE MOBILITY POLICY AND SOLUTION

### HOW TO READ THE RESULTS ?

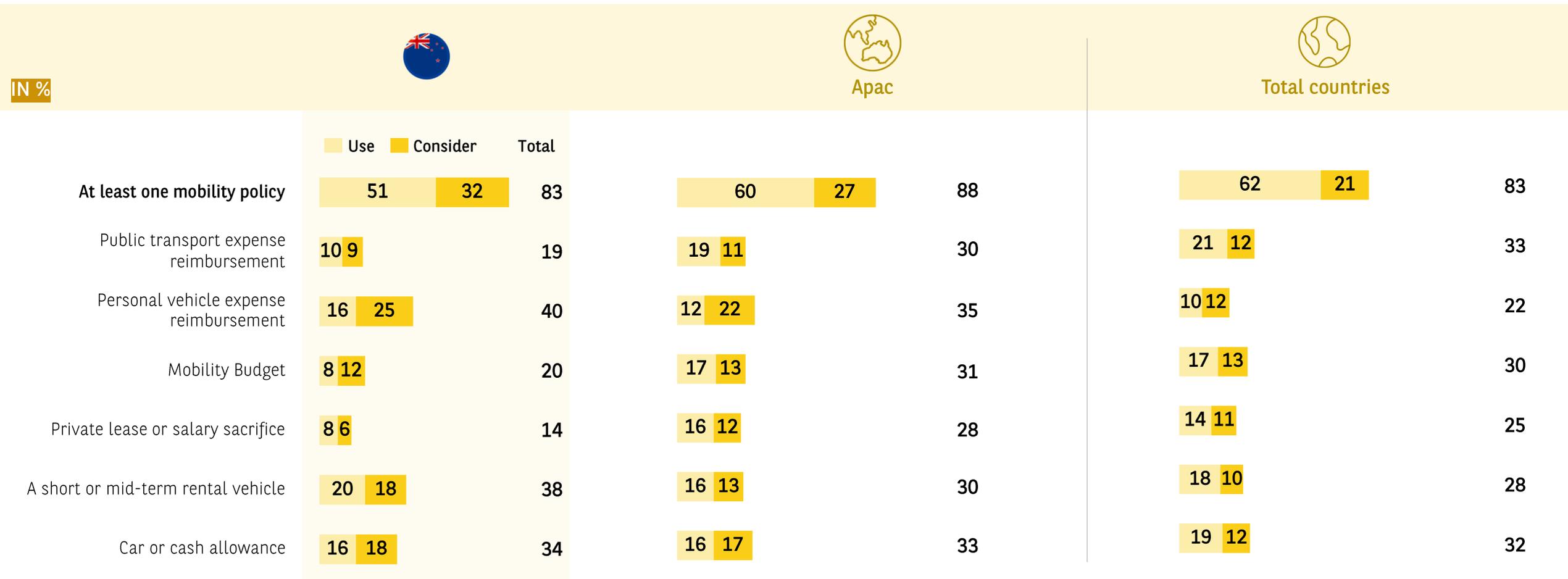
In New Zealand in 2026, 95% of the companies are already using at least one mobility policy or solution or are considering doing so in the next 3 years.



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

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 19% of the companies are already using Public transport expense reimbursement or are considering doing so in the next 3 years.



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

Basis: companies with corporate vehicles = 100%



## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 19% of the companies are already using Public transport expense reimbursement or are considering doing so in the next 3 years.



Apac

Total countries

	IN %	2024	2025	2026		2026	2024	2025	2026
Public transport expense reimbursement	Use	6	12	10	Apac	19	21	19	21
	<b>Total (use + consider)</b>	<b>14</b>	<b>19</b>	<b>19</b>		<b>30</b>	<b>31</b>	<b>32</b>	<b>33</b>
Personal vehicle expense reimbursement	Use		15	16		12		8	10
	<b>Total (use + consider)</b>		<b>40</b>	<b>40</b>		<b>35</b>		<b>19</b>	<b>22</b>
Mobility Budget	Use	10	9	8		17	15	15	17
	<b>Total (use + consider)</b>	<b>24</b>	<b>20</b>	<b>20</b>		<b>31</b>	<b>28</b>	<b>29</b>	<b>30</b>
Private lease or salary sacrifice	Use	4	3	8		16	13	6	14
	<b>Total (use + consider)</b>	<b>10</b>	<b>9</b>	<b>14</b>		<b>28</b>	<b>24</b>	<b>15</b>	<b>25</b>
A short or mid term rental vehicle	Use	20	22	20		16	17	17	18
	<b>Total (use + consider)</b>	<b>33</b>	<b>38</b>	<b>38</b>		<b>30</b>	<b>27</b>	<b>29</b>	<b>28</b>
Car or cash allowance	Use	18	15	16	16	17	17	19	
	<b>Total (use + consider)</b>	<b>36</b>	<b>30</b>	<b>34</b>	<b>33</b>	<b>28</b>	<b>30</b>	<b>32</b>	

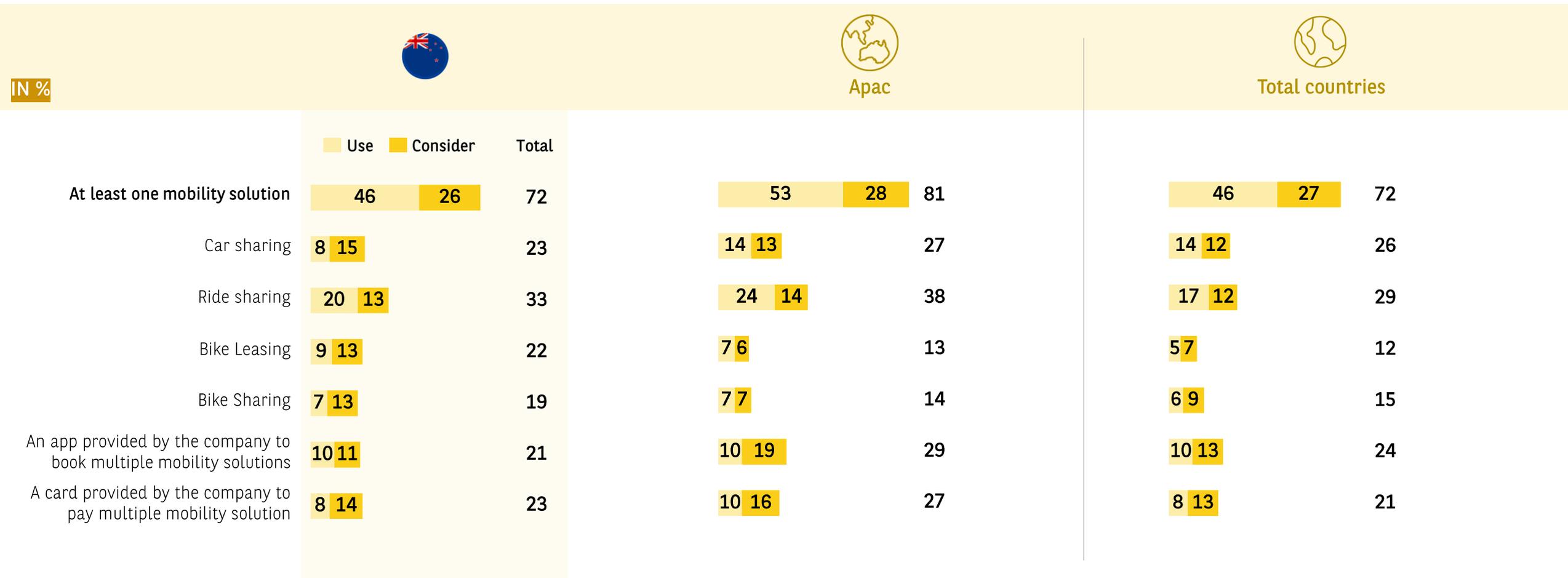
MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?  
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave



## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 23% of the companies are already using Car sharing or are considering doing so in the next 3 years.



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

Basis: companies with corporate vehicles = 100%

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 23% of the companies are already using Car sharing or are considering doing so in the next 3 years.



Apac



Total countries

	IN %	2024	2025	2026	2024	2025	2026	2024	2025	2026
Car sharing	Use	11	5	8	Apac	Apac	14	12	12	14
	<b>Total (use + consider)</b>	<b>24</b>	<b>21</b>	<b>23</b>			<b>27</b>	<b>23</b>	<b>23</b>	<b>26</b>
Ride sharing or car pooling	Use		21	20			24	19	8	17
	<b>Total (use + consider)</b>		<b>31</b>	<b>33</b>			<b>38</b>	<b>29</b>	<b>19</b>	<b>29</b>
Bike Leasing	Use		5	9			7		4	5
	<b>Total (use + consider)</b>		<b>18</b>	<b>22</b>			<b>13</b>		<b>12</b>	<b>12</b>
Bike Sharing	Use		6	7			7		5	6
	<b>Total (use + consider)</b>		<b>20</b>	<b>19</b>			<b>14</b>		<b>15</b>	<b>15</b>
An app provided by the company to book multiple mobility solutions	Use	8	9	10			10	10	11	10
	<b>Total (use + consider)</b>	<b>24</b>	<b>24</b>	<b>21</b>			<b>29</b>	<b>21</b>	<b>23</b>	<b>24</b>
A card provided by the company to pay multiple mobility solution	Use		9	8	10		8	8		
	<b>Total (use + consider)</b>		<b>26</b>	<b>23</b>	<b>27</b>		<b>22</b>	<b>21</b>		

Change of definition

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

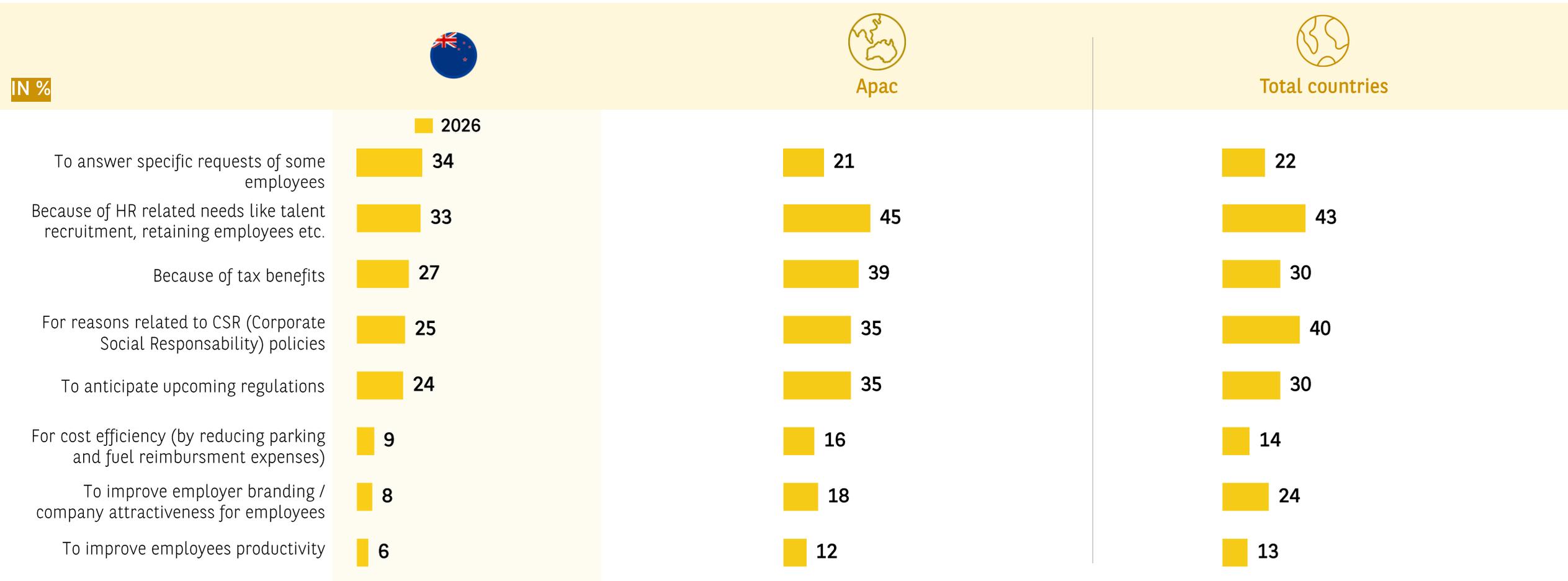
X% Significantly higher / lower vs. previous wave



# REASONS FOR IMPLEMENTING MOBILITY SOLUTIONS & POLICIES

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 34% of the companies declare that the main reason for introducing mobility solutions & policies is: To answer specific requests of some employees.



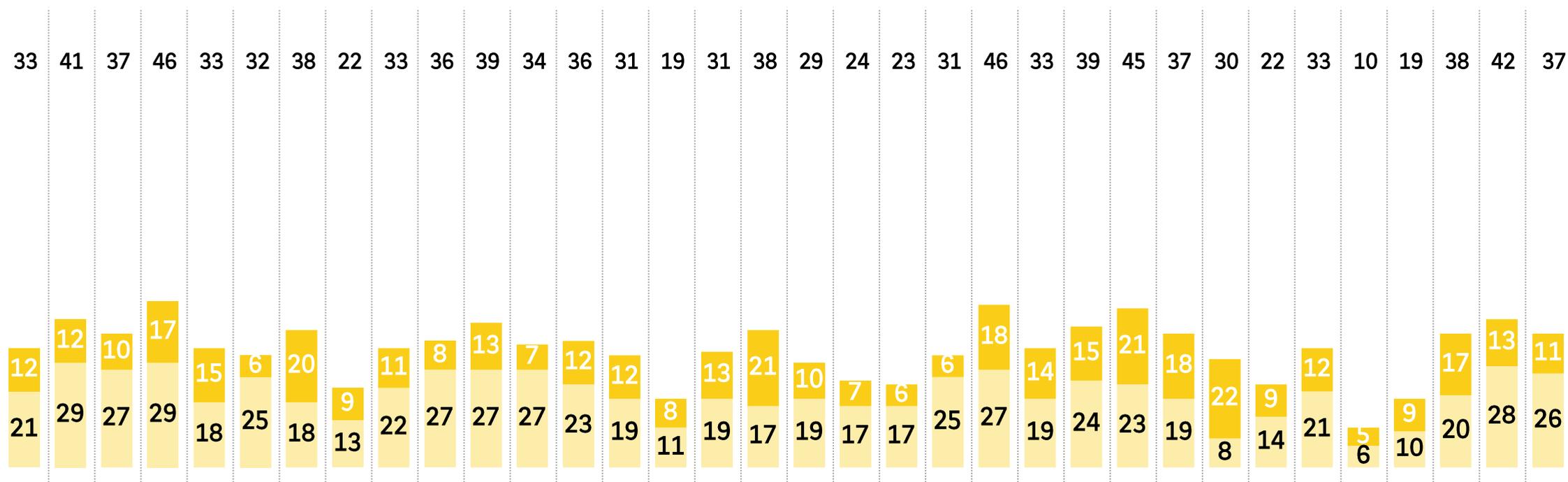
MM16. For what reasons has your company introduced, or does your company intend to introduce, these mobility solutions and policies?  
Basis: companies using or considering at least one mobility solution or policy

# PUBLIC TRANSPORT EXPENSE REIMBURSEMENT

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 19% of the companies are already using Public transport expense reimbursement or are considering doing so in the next 3 years.

IN %



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

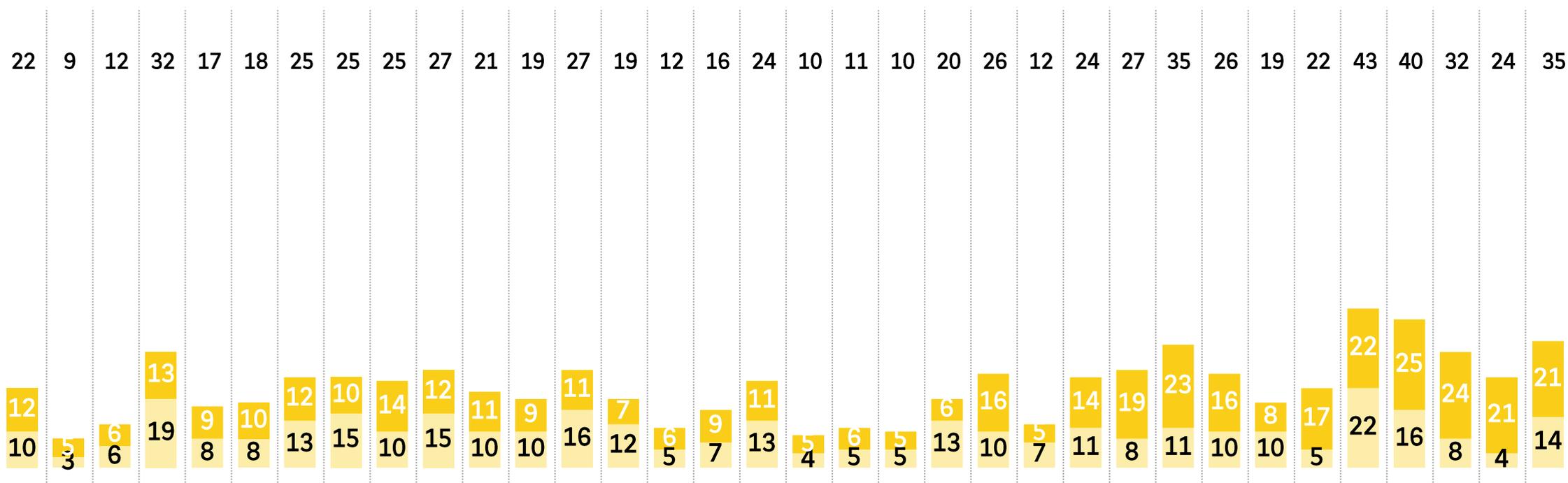
Basis: companies with corporate vehicles = 100%

# PERSONAL VEHICLE EXPENSE REIMBURSEMENT

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 40% of the companies are already using Personal vehicle expense reimbursement or are considering doing so in the next 3 years.

IN %

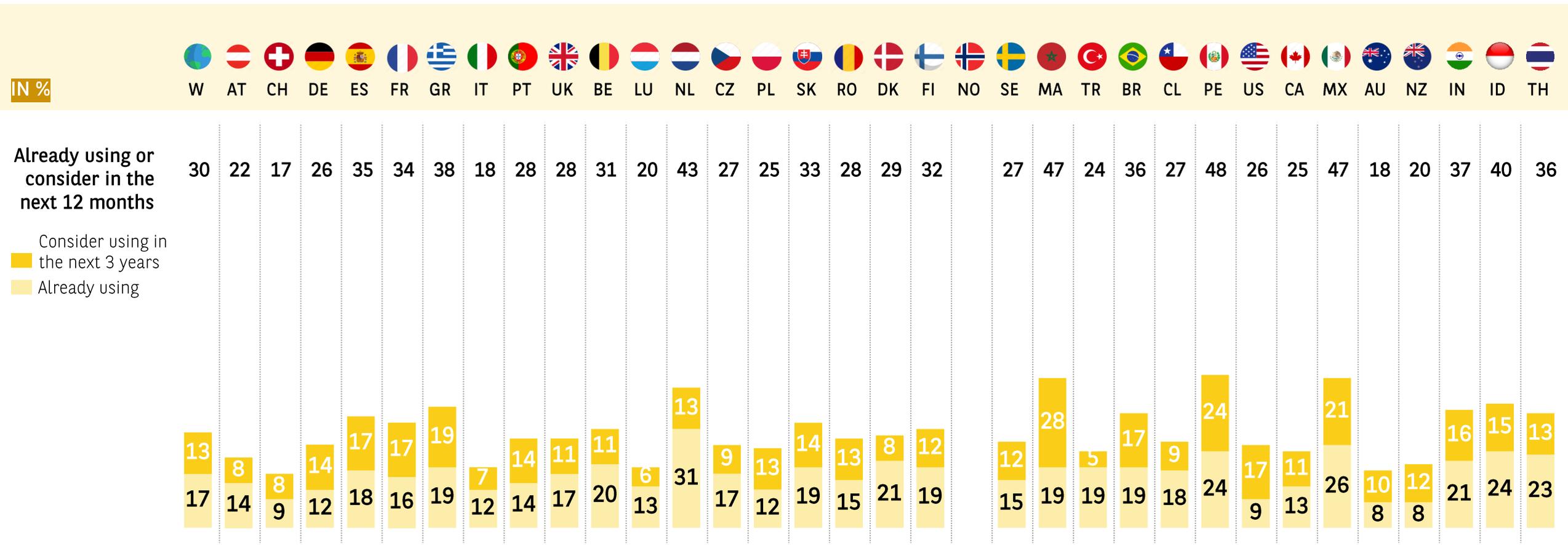


MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?

Basis: companies with corporate vehicles = 100%

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 20% of the companies are already using Mobility Budget or are considering doing so in the next 3 years.



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

# PRIVATE LEASE OR SALARY SACRIFICE

## HOW TO READ THE RESULTS ?

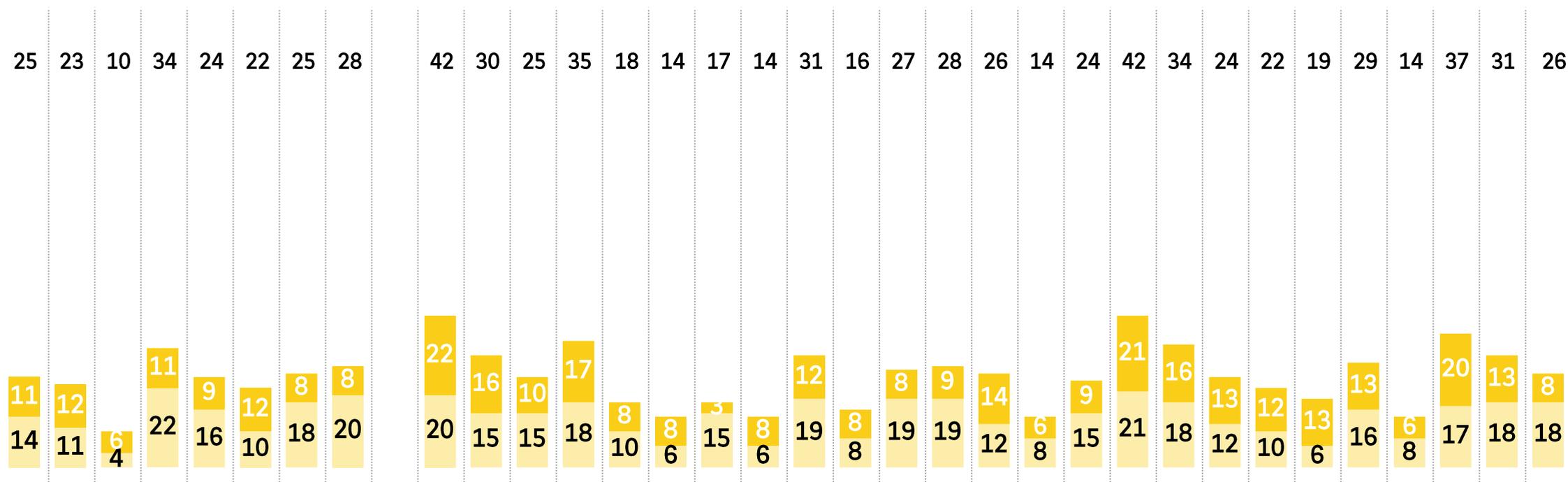
In New Zealand in 2026, 14% of the companies are already using Private lease or salary sacrifice or are considering doing so in the next 3 years.

IN %



Already using or consider in the next 12 months

Consider using in the next 3 years  
Already using



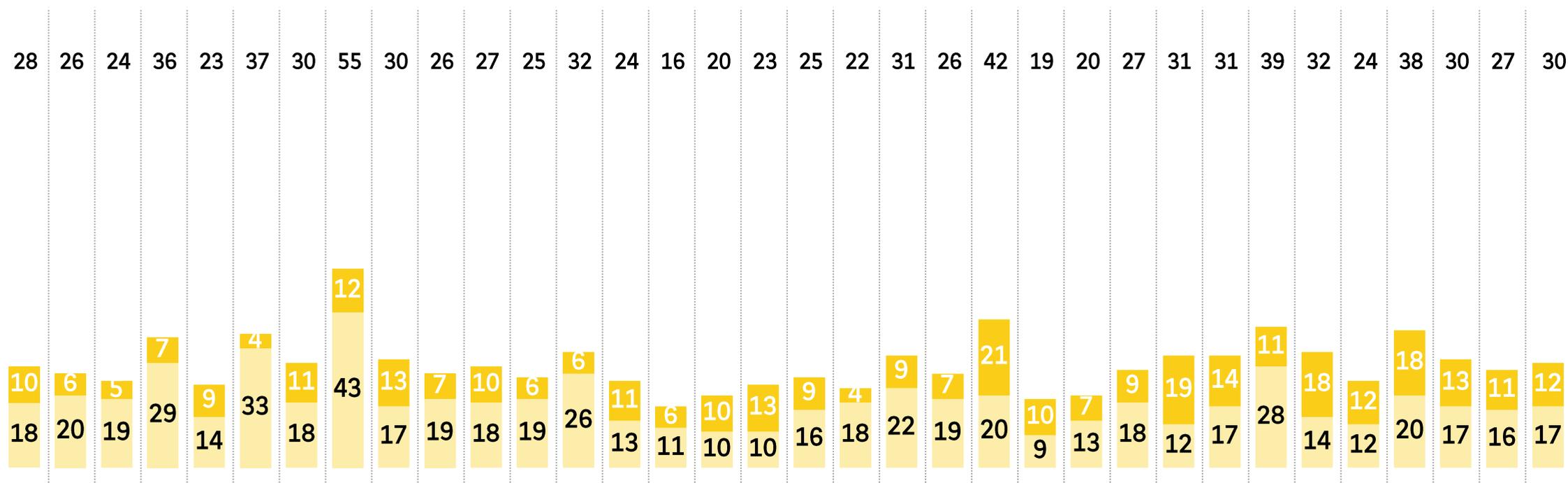
MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?  
Basis: companies with corporate vehicles = 100%

# SHORT OR MID TERM RENTAL VEHICLE

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 38% of the companies are already using short or mid term rental vehicle or are considering doing so in the next 3 years.

IN %



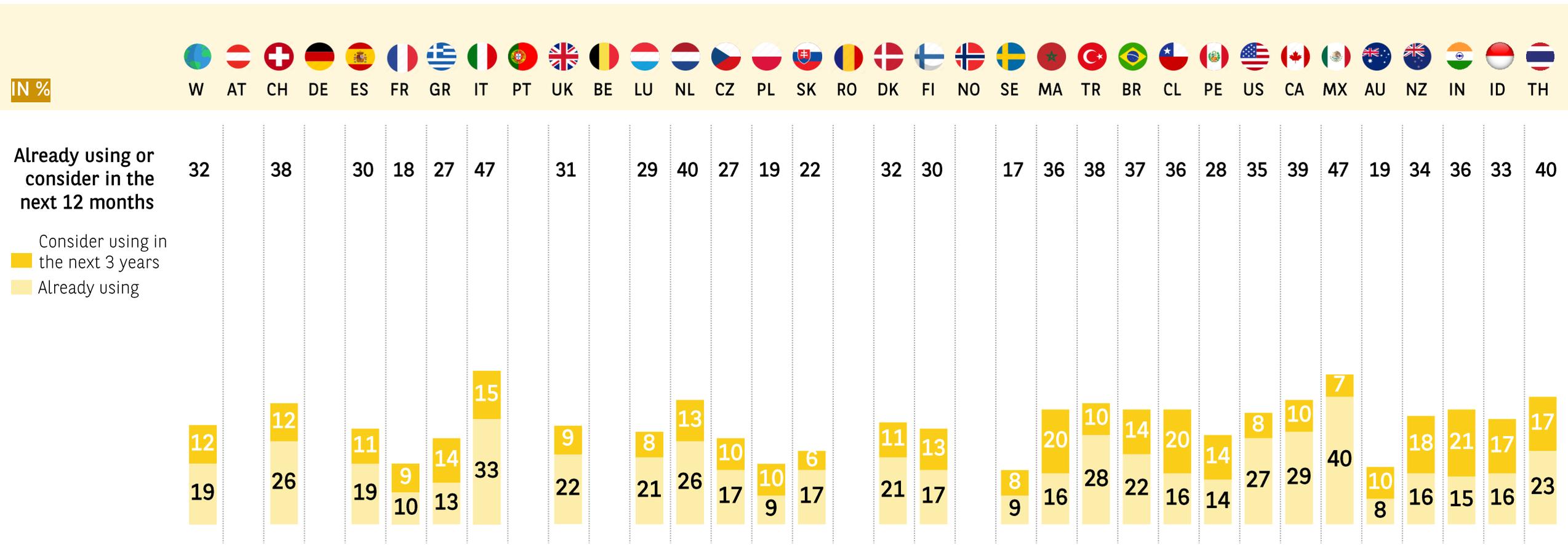
MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?

Basis: companies with corporate vehicles = 100%

# CAR OR CASH ALLOWANCE

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 34% of the companies are already using Car or cash allowance or are considering doing so in the next 3 years.



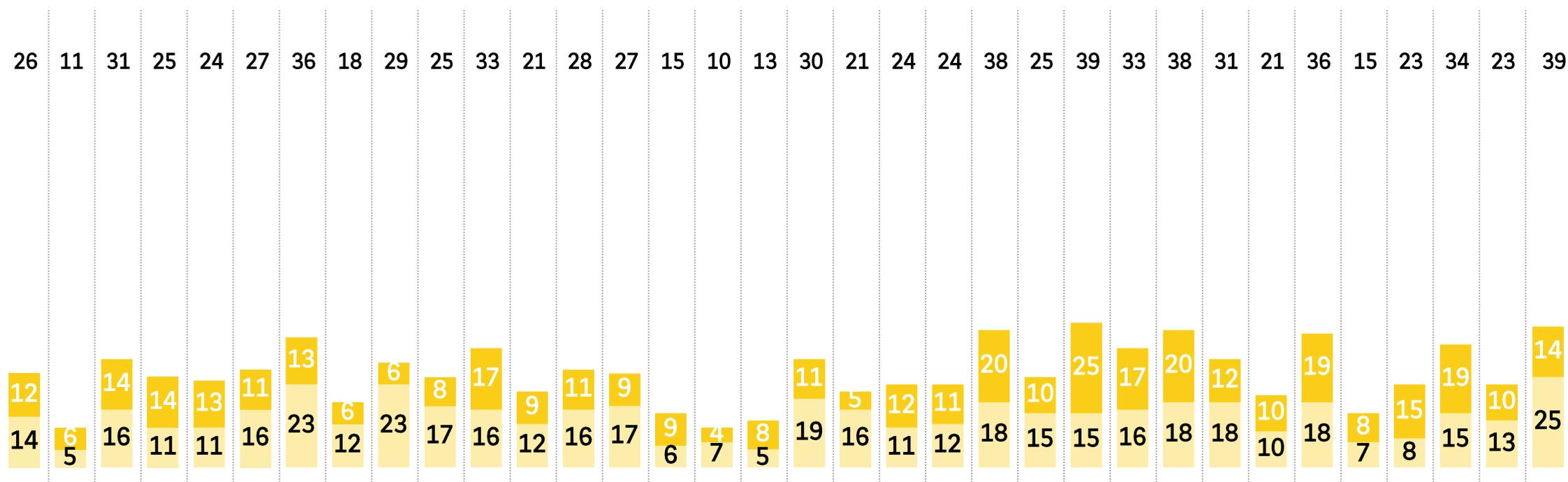
MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?  
Basis: companies with corporate vehicles = 100%

# CAR SHARING / POOLED VEHICLES

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 23% of the companies are already using Car sharing / pooled vehicles or are considering doing so in the next 3 years.

IN %



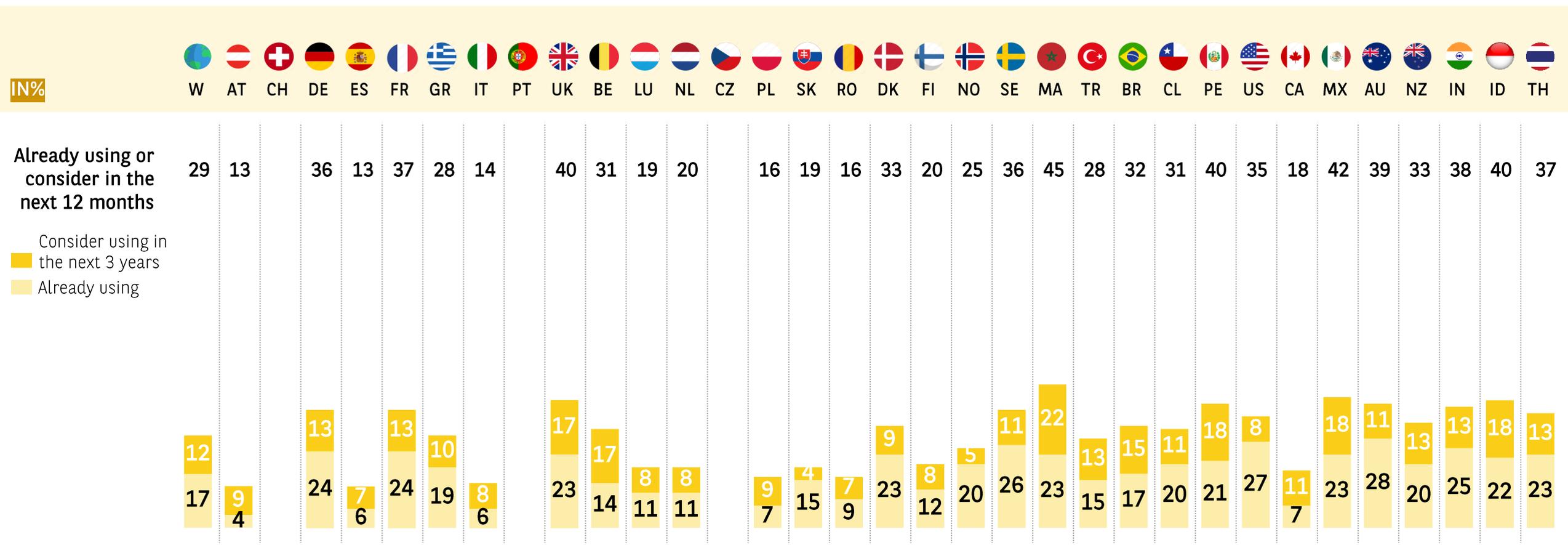
MM15. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?

Basis: companies with corporate vehicles = 100%

# RIDE SHARING / CARPOOLING

## HOW TO READ THE RESULTS ?

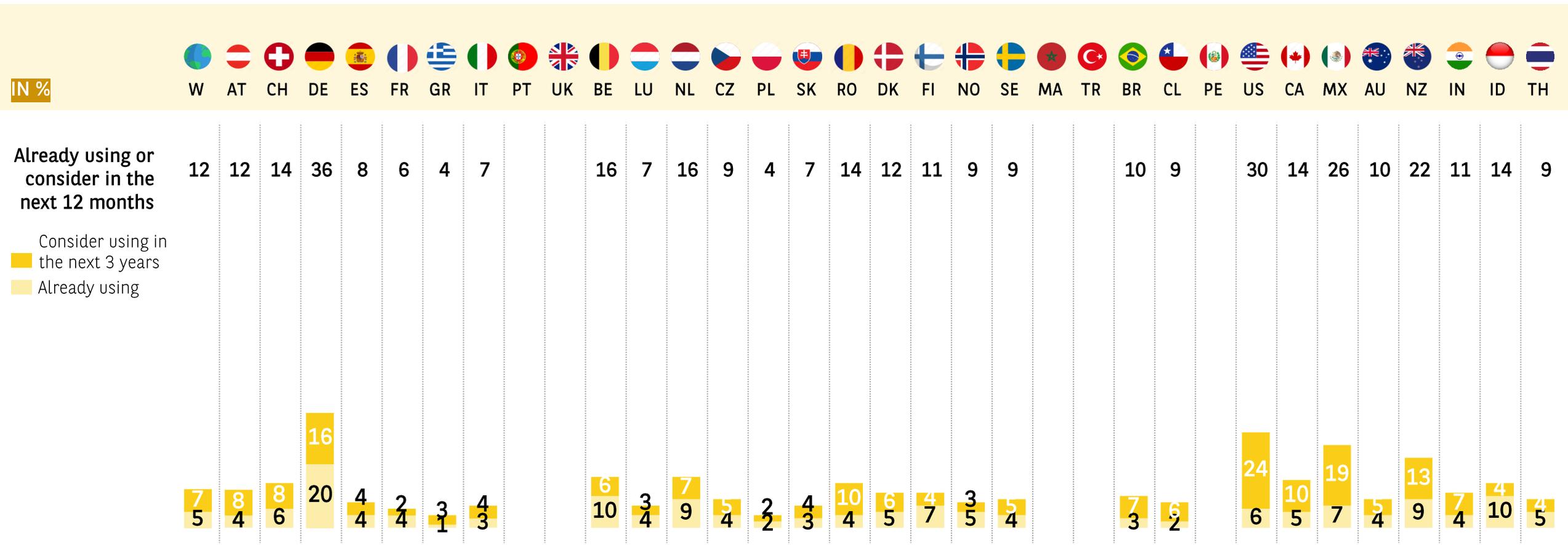
In New Zealand in 2026, 33% of the companies are already using Ride sharing / carpooling or are considering doing so in the next 3 years.



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

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 22% of the companies are already using Bike leasing or are considering doing so in the next 3 years.



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

## HOW TO READ THE RESULTS ?

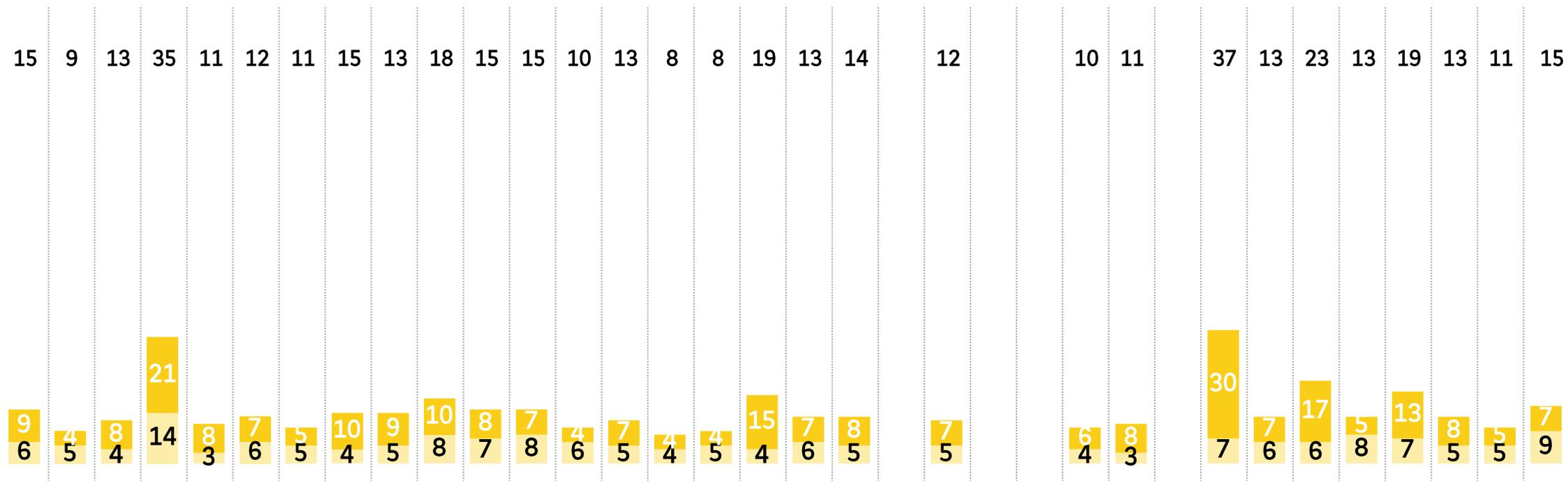
In New Zealand in 2026, 19% of the companies are already using Bike sharing or are considering doing so in the next 3 years.

IN %



Already using or consider in the next 12 months

Consider using in the next 3 years  
Already using



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

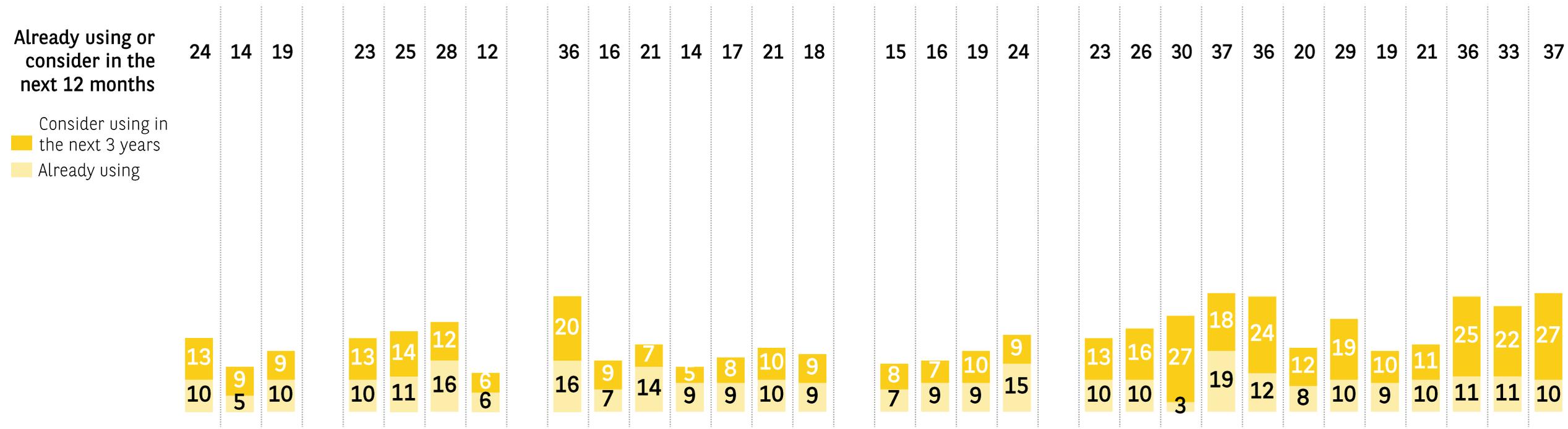


# AN APP PROVIDED BY THE COMPANY TO BOOK MULTIPLE MOBILITY SOLUTIONS

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 21% of the companies are already using An app provided by the company to book multiple mobility solutions or are considering doing so in the next 3 years.

IN %



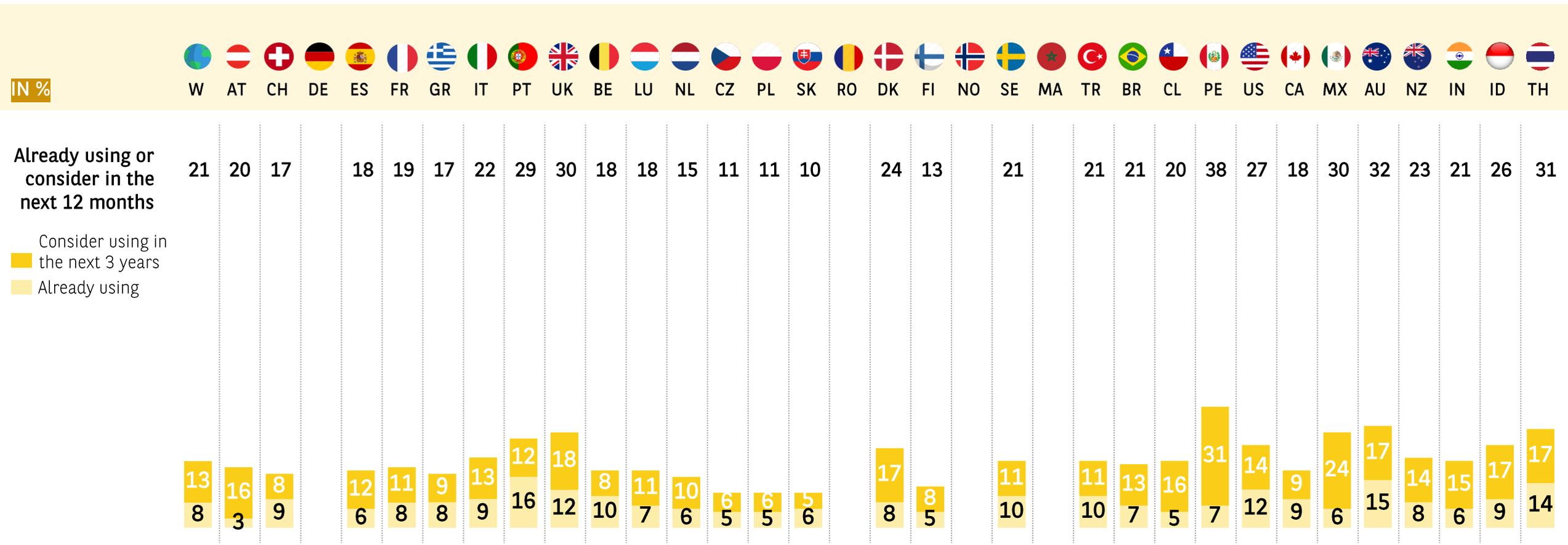
MM15. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?  
Basis: companies with corporate vehicles = 100%



# A CARD PROVIDED BY THE COMPANY TO PAY MULTIPLE MOBILITY SOLUTION

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 23% of the companies are already using A card provided by the company to pay multiple mobility solution or are considering doing so in the next 3 years.



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

# 06

## FUTURE CHALLENGES

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



## Only a small share of New Zealand companies have set specific decarbonization targets

11% of companies in New Zealand have set targeted decarbonization goals, and 24% are currently evaluating such goals, mainly driven by small companies (24%). Large companies are less likely to have set such goals (5%) or to be considering them (15%), while medium-sized companies are less likely to consider them (13%).

Employee mobility is critical, with 22% of companies seeing it as a significant contributor to their decarbonization targets and 36% viewing it as a moderate contributor, consistent with the APAC average.

## Rising TCO and fleet electrification are the top future challenges in fleet management

56% of New Zealand companies identify mitigating the increase in total cost of ownership (TCO) as their primary challenge over the next three years, while 50% cite implementing electrified vehicles in their fleets as a significant concern.

## Fleet managers in New Zealand are looking for innovative tools to improve fleet management

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

- Automated vehicle performance monitoring and predictive maintenance (19%)
- Fuel consumption monitoring and optimization (17%)
- An all-in-one fleet management software / platform (15%)
- Cost control and financial oversight of fleet operations (11%)

Additionally, 34% need help in logistics and fleet operations management, including:

- Fleet allocation, operations coordination and optimization (20%)
- Fleet allocation, operations coordination and optimization (20%)
- Route and delivery optimization (15%)

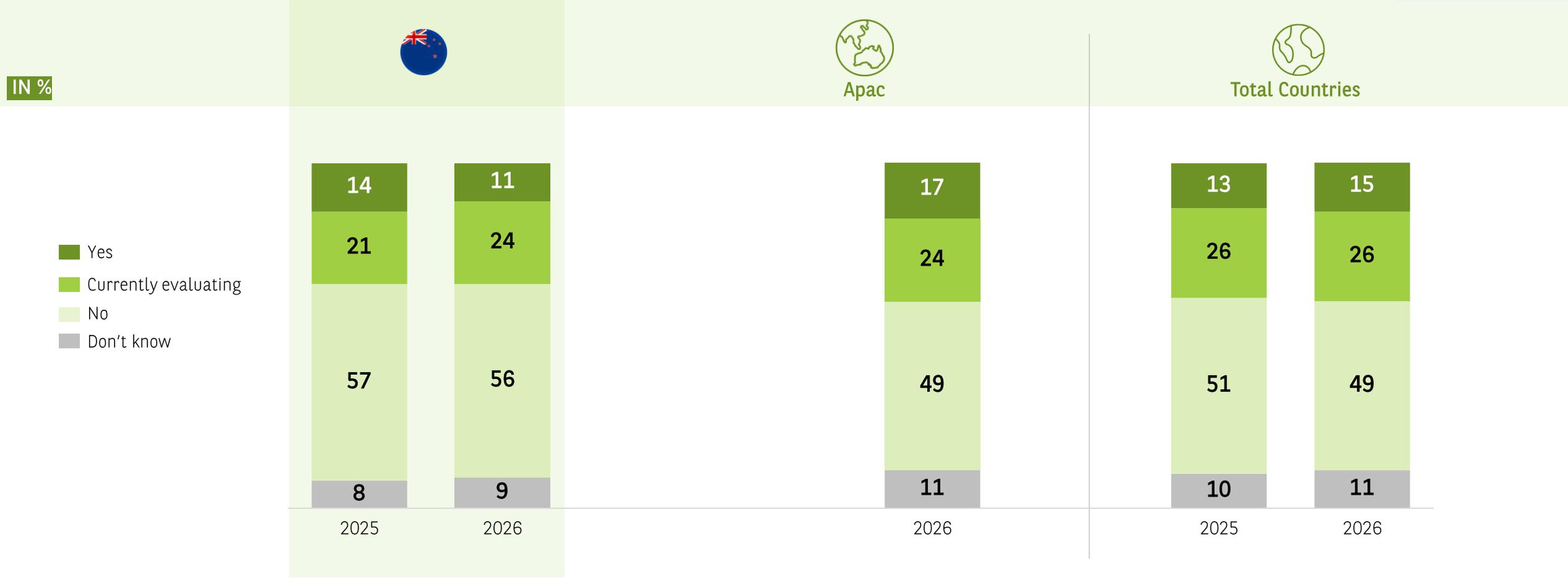
Furthermore, 15% require real-time vehicle tracking and monitoring.

# DECARBONIZATION GOALS

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 11% of the companies have targeted decarbonization goals.

Change of question



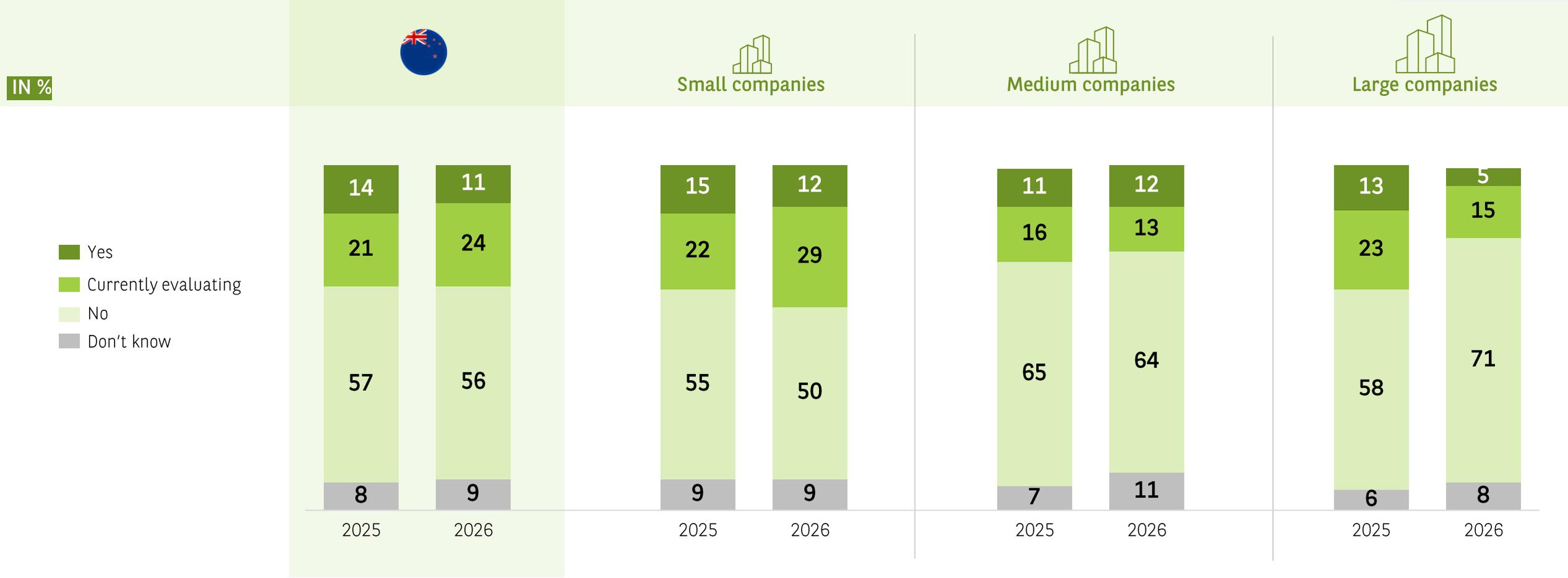
A56. Does your organization have targeted decarbonization goals? It is not limited to fleet, for instance "Net 0"  
Basis: companies with corporate vehicles = 100%

# DECARBONIZATION GOALS

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 11% of the companies have targeted decarbonization goals.

Change of question



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

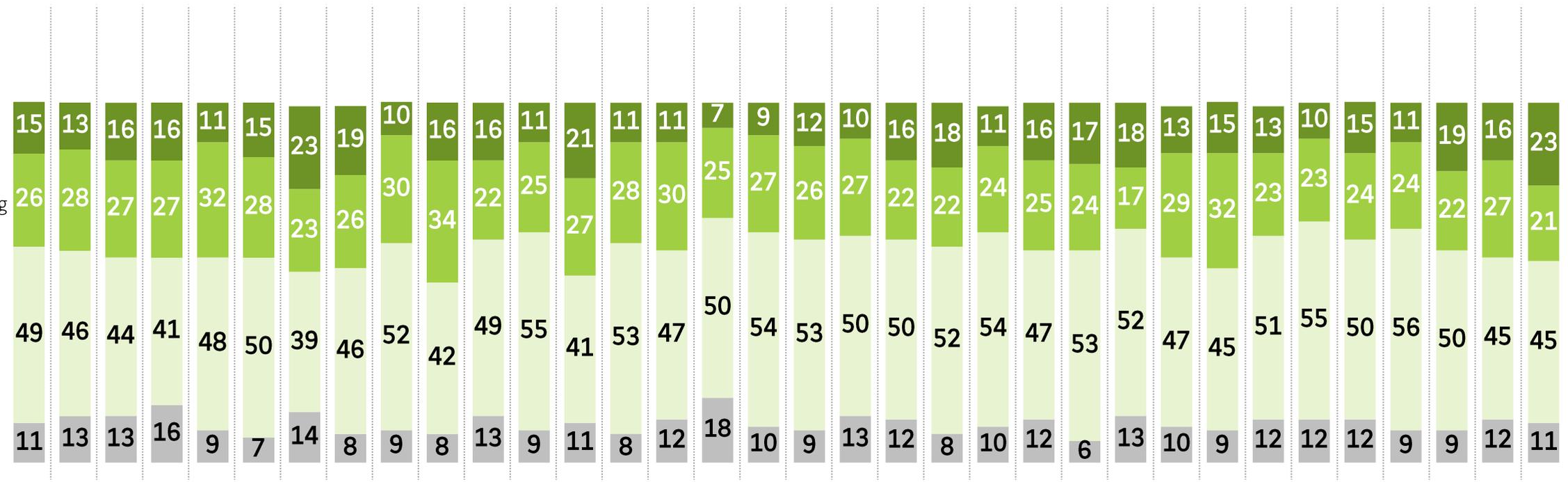
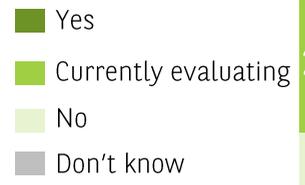
# DECARBONIZATION GOALS

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 11% of the companies have targeted decarbonization goals.

Change of question

IN %



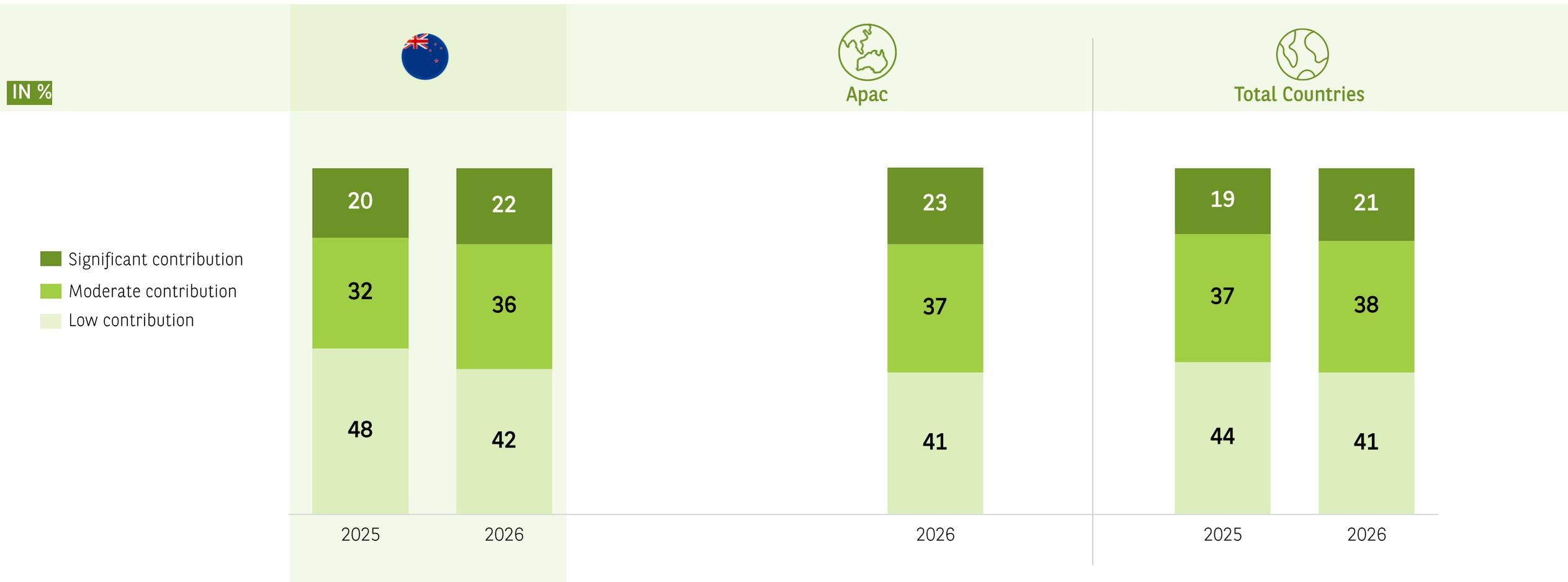
A56. Does your organization have targeted decarbonization goals? It is not limited to fleet, for instance "Net 0"  
Basis: companies with corporate vehicles = 100%



# IMPORTANCE OF EMPLOYEE'S MOBILITY TO DECARBONIZATION GOALS

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 22% of the companies that have targeted decarbonization goals rate the contribution of employee's mobility in these decarbonization targets as significant contribution.



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

# IMPORTANCE OF EMPLOYEE'S MOBILITY TO DECARBONIZATION GOALS

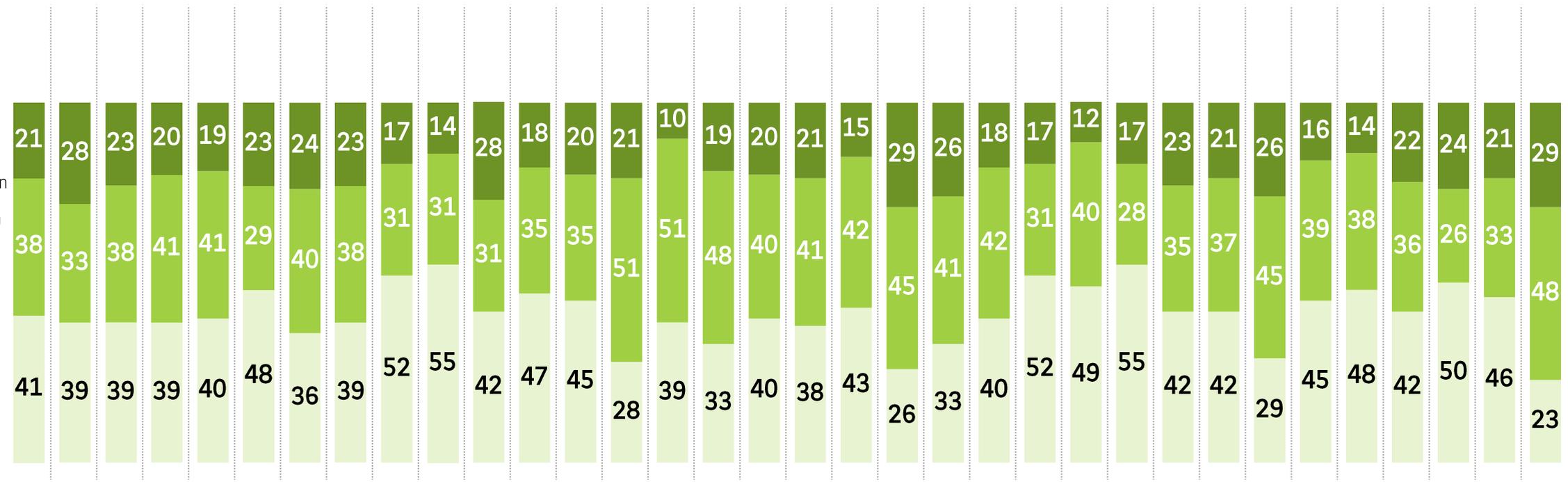
## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 22% of the companies that have targeted decarbonization goals rate the contribution of employee's mobility in these decarbonization targets as significant contribution.

IN %



Significant contribution  
 Moderate contribution  
 Low contribution



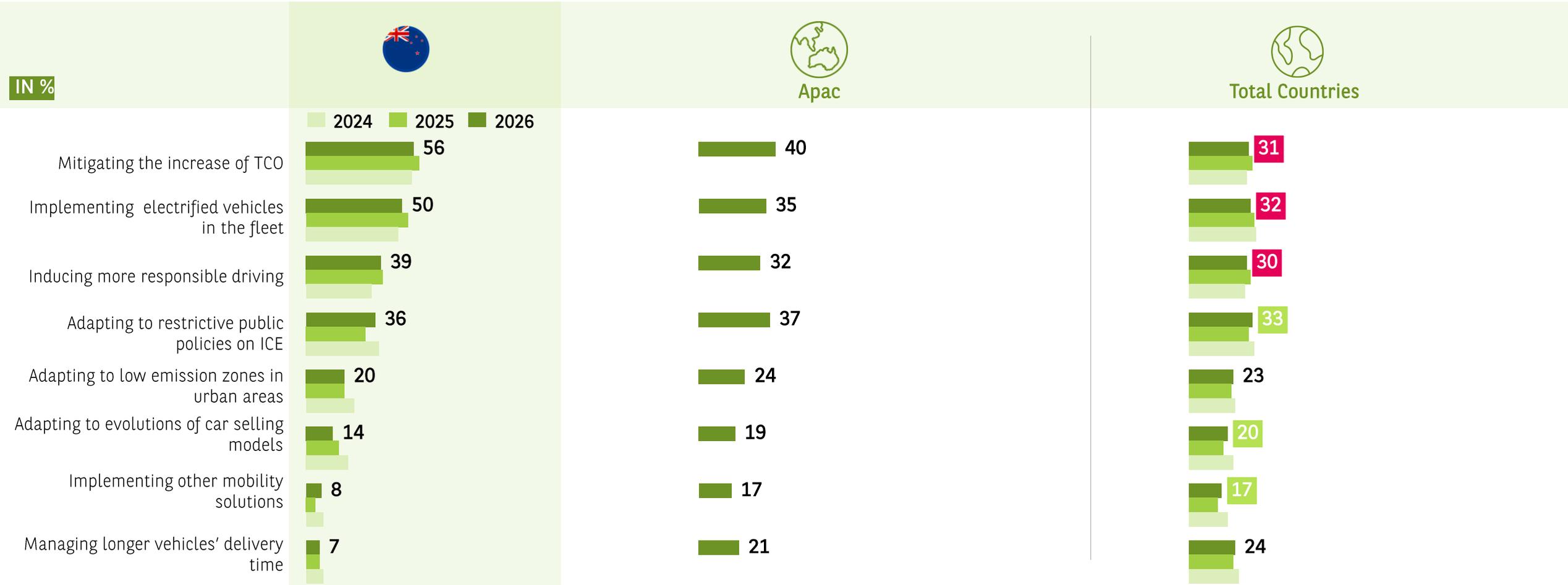
A57. How would you rate the contribution of employees' mobility in these decarbonization targets?  
 Basis: companies that have targeted decarbonization goals



# THREE MAIN CHALLENGES FOR FLEET MANAGEMENT IN THE N3Y

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 56% of the companies declare that Mitigating the increase of TCO is in the top 3 challenges for fleet management in the next 3 years.



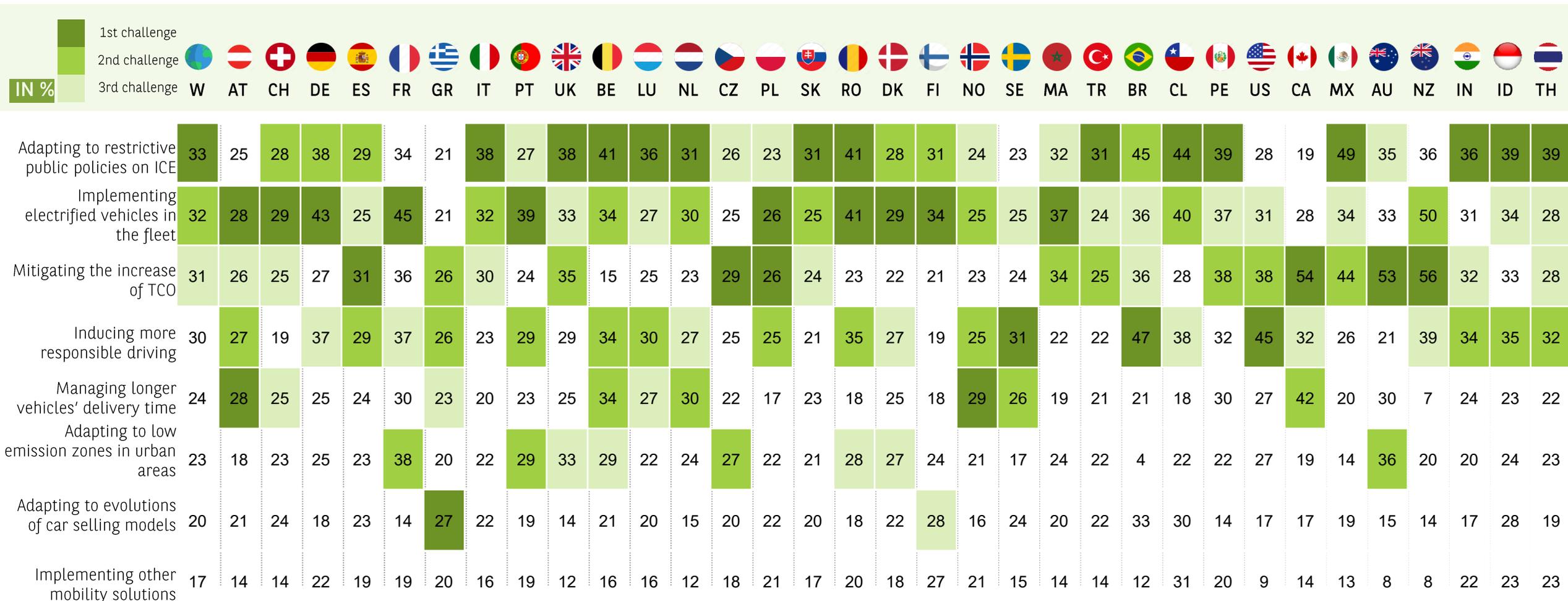
A11. According to you, what will be the three main challenges for fleet management in the next 3 years?  
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

# THREE MAIN CHALLENGES FOR FLEET MANAGEMENT IN THE N3Y

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 56% of the companies declare that Mitigating the increase of TCO is in the top 3 challenges for fleet management in the next 3 years.



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

# OPEN-ENDED QUESTION: WHAT WOULD HELP FLEET MANAGERS?

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 19% of the respondents declare that Automated vehicle performance monitoring and predictive maintenance would help them as a fleet manager.

New question

IN %			
		Apac	Total Countries
<b>Fleet performance management</b>	<b>47%</b>	<b>47%</b>	<b>44%</b>
Automated vehicle performance monitoring and predictive maintenance	19%	21%	18%
Fuel consumption monitoring and optimization	17%	13%	13%
An all-in-one fleet management software / platform	15%	15%	14%
Cost control and financial oversight of fleet operations	11%	10%	11%
<b>Logistics and fleet operations management</b>	<b>34%</b>	<b>30%</b>	<b>27%</b>
Fleet allocation, operations coordination and optimization	20%	16%	14%
Route and delivery optimization	15%	16%	15%
Intelligent cargo and load optimization	3%	2%	2%
<b>Driver and safety</b>	<b>19%</b>	<b>23%</b>	<b>21%</b>
Vehicles real-time tracking and monitoring	15%	18%	17%
Driver management and safety standards implementation	3%	4%	3%
Fleet security and protection systems	2%	2%	2%
<b>Environment &amp; Sustainability</b>	<b>8%</b>	<b>6%</b>	<b>5%</b>
Support for the adoption and management of electric vehicles	3%	2%	2%
Tools and practices for a sustainable fleet management	3%	2%	2%
Vehicle emissions monitoring	3%	2%	2%
<b>Administrative &amp; Compliance</b>	<b>7%</b>	<b>9%</b>	<b>9%</b>
Centralizing and digitizing fleet documentation	6%	7%	7%
Proactive compliance deadline management	1%	2%	2%
<b>Others</b>	<b>16%</b>	<b>18%</b>	<b>22%</b>
Other	15%	17%	20%
Enhanced refrigerated vehicles	1%	2%	2%

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

Basis: companies with corporate vehicles = 100%





## VERBATIM FOR TOP 3 TOPICS

Fleet allocation, operations coordination and optimization

20%

Automated vehicle performance monitoring and predictive maintenance

19%

Fuel consumption monitoring and optimization

17%



*"Sometimes I spend hours coordinating shifts for using the vehicles. A solution that allows me to assign them quickly would take a huge weight off my shoulders"*

*"A new software system that sends me automatic alerts for servicing and preventive maintenance"*

*"New software features that allow me to have clear reports on fuel consumption and vehicle status"*

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

# OPEN-ENDED QUESTION: WHAT WOULD HELP FLEET MANAGERS?

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 19% 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
<b>Fleet performance management</b>	<b>44%</b>	<b>41%</b>	<b>47%</b>	<b>45%</b>	<b>44%</b>	<b>46%</b>	<b>39%</b>	<b>36%</b>	<b>48%</b>	<b>46%</b>	<b>41%</b>	<b>40%</b>	<b>42%</b>	<b>45%</b>	<b>38%</b>	<b>40%</b>	<b>47%</b>	<b>45%</b>	<b>41%</b>	<b>43%</b>	<b>43%</b>
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%
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%
An all-in-one fleet management software / platform	14%	12%	18%	18%	17%	18%	15%	9%	13%	14%	15%	15%	11%	12%	10%	12%	12%	16%	11%	15%	11%
Cost control and financial oversight of fleet operations	11%	9%	12%	10%	11%	14%	7%	11%	15%	13%	12%	12%	8%	9%	10%	8%	12%	15%	14%	12%	10%
<b>Logistics and fleet operations management</b>	<b>27%</b>	<b>24%</b>	<b>23%</b>	<b>23%</b>	<b>27%</b>	<b>31%</b>	<b>21%</b>	<b>29%</b>	<b>26%</b>	<b>29%</b>	<b>28%</b>	<b>26%</b>	<b>23%</b>	<b>23%</b>	<b>25%</b>	<b>29%</b>	<b>30%</b>	<b>27%</b>	<b>34%</b>	<b>24%</b>	<b>27%</b>
Fleet allocation, operations coordination and optimization	14%	10%	12%	13%	13%	14%	9%	13%	14%	15%	13%	13%	12%	14%	11%	12%	16%	14%	17%	13%	14%
Route and delivery optimization	15%	15%	11%	12%	14%	19%	11%	15%	12%	13%	15%	16%	11%	13%	15%	16%	17%	14%	19%	12%	15%
Intelligent cargo and load optimization	2%	2%	2%	1%	4%	2%	2%	4%	1%	4%	3%	1%	3%	1%	2%	3%	3%	2%	3%	2%	3%
<b>Driver and safety</b>	<b>21%</b>	<b>24%</b>	<b>21%</b>	<b>19%</b>	<b>18%</b>	<b>24%</b>	<b>19%</b>	<b>17%</b>	<b>21%</b>	<b>23%</b>	<b>22%</b>	<b>20%</b>	<b>17%</b>	<b>19%</b>	<b>18%</b>	<b>23%</b>	<b>26%</b>	<b>19%</b>	<b>24%</b>	<b>24%</b>	<b>20%</b>
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%
<b>Environment &amp; Sustainability</b>	<b>5%</b>	<b>6%</b>	<b>5%</b>	<b>5%</b>	<b>7%</b>	<b>6%</b>	<b>3%</b>	<b>6%</b>	<b>8%</b>	<b>5%</b>	<b>5%</b>	<b>6%</b>	<b>7%</b>	<b>4%</b>	<b>2%</b>	<b>5%</b>	<b>3%</b>	<b>6%</b>	<b>6%</b>	<b>5%</b>	<b>5%</b>
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%
<b>Administrative &amp; Compliance</b>	<b>9%</b>	<b>8%</b>	<b>10%</b>	<b>13%</b>	<b>12%</b>	<b>5%</b>	<b>8%</b>	<b>14%</b>	<b>7%</b>	<b>10%</b>	<b>6%</b>	<b>7%</b>	<b>14%</b>	<b>8%</b>	<b>9%</b>	<b>9%</b>	<b>6%</b>	<b>10%</b>	<b>5%</b>	<b>7%</b>	<b>12%</b>
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%
<b>Others</b>	<b>22%</b>	<b>24%</b>	<b>20%</b>	<b>22%</b>	<b>20%</b>	<b>22%</b>	<b>24%</b>	<b>27%</b>	<b>19%</b>	<b>23%</b>	<b>25%</b>	<b>21%</b>	<b>25%</b>	<b>23%</b>	<b>29%</b>	<b>23%</b>	<b>20%</b>	<b>23%</b>	<b>22%</b>	<b>22%</b>	<b>19%</b>
Other	20%	22%	20%	21%	19%	20%	23%	26%	18%	20%	24%	20%	23%	21%	27%	22%	17%	21%	20%	20%	18%
Enhanced refrigerated vehicles	2%	2%	0%	1%	0%	2%	2%	1%	1%	2%	1%	1%	1%	2%	2%	2%	2%	2%	3%	2%	1%

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

# OPEN-ENDED QUESTION: WHAT WOULD HELP FLEET MANAGERS?

## HOW TO READ THE RESULTS ?

In New Zealand in 2026, 19% 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
<b>Fleet performance management</b>	<b>44%</b>	<b>39%</b>	<b>45%</b>	<b>46%</b>	<b>45%</b>	<b>47%</b>	<b>45%</b>	<b>49%</b>	<b>47%</b>	<b>47%</b>	<b>47%</b>	<b>43%</b>	<b>51%</b>	<b>45%</b>
Automated vehicle performance monitoring and predictive maintenance	18%	17%	21%	19%	18%	14%	20%	26%	19%	21%	19%	17%	27%	22%
Fuel consumption monitoring and optimization	13%	11%	12%	14%	14%	18%	11%	15%	12%	12%	17%	12%	15%	12%
An all-in-one fleet management software / platform	14%	13%	13%	13%	12%	15%	16%	13%	16%	15%	15%	16%	15%	15%
Cost control and financial oversight of fleet operations	11%	6%	12%	12%	15%	14%	10%	10%	12%	13%	11%	11%	9%	8%
<b>Logistics and fleet operations management</b>	<b>27%</b>	<b>24%</b>	<b>24%</b>	<b>27%</b>	<b>29%</b>	<b>33%</b>	<b>30%</b>	<b>26%</b>	<b>32%</b>	<b>28%</b>	<b>34%</b>	<b>32%</b>	<b>24%</b>	<b>31%</b>
Fleet allocation, operations coordination and optimization	14%	9%	13%	14%	15%	16%	13%	11%	19%	16%	20%	14%	11%	17%
Route and delivery optimization	15%	15%	13%	16%	14%	21%	17%	15%	21%	13%	15%	20%	12%	19%
Intelligent cargo and load optimization	2%	2%	1%	0%	3%	3%	3%	1%	1%	2%	3%	2%	1%	2%
<b>Driver and safety</b>	<b>21%</b>	<b>19%</b>	<b>19%</b>	<b>17%</b>	<b>21%</b>	<b>17%</b>	<b>30%</b>	<b>17%</b>	<b>22%</b>	<b>18%</b>	<b>19%</b>	<b>27%</b>	<b>25%</b>	<b>25%</b>
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%
<b>Environment &amp; Sustainability</b>	<b>5%</b>	<b>5%</b>	<b>7%</b>	<b>8%</b>	<b>4%</b>	<b>4%</b>	<b>5%</b>	<b>7%</b>	<b>5%</b>	<b>5%</b>	<b>8%</b>	<b>5%</b>	<b>7%</b>	<b>3%</b>
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%
<b>Administrative &amp; Compliance</b>	<b>9%</b>	<b>9%</b>	<b>7%</b>	<b>11%</b>	<b>11%</b>	<b>11%</b>	<b>8%</b>	<b>11%</b>	<b>11%</b>	<b>11%</b>	<b>7%</b>	<b>12%</b>	<b>9%</b>	<b>7%</b>
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%
<b>Others</b>	<b>22%</b>	<b>25%</b>	<b>25%</b>	<b>21%</b>	<b>21%</b>	<b>19%</b>	<b>17%</b>	<b>21%</b>	<b>17%</b>	<b>21%</b>	<b>16%</b>	<b>16%</b>	<b>18%</b>	<b>22%</b>
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%

<b>Administrative &amp; Compliance</b>	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.
<b>Driver and safety</b>	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.
<b>Environment &amp; Sustainability</b>	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.



<b>Fleet performance management</b>	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).
<b>Logistics and fleet operations management</b>	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.
<b>Others</b>	Enhanced refrigerated vehicles	Refrigerated vehicles equipped with real-time temperature monitoring systems, sensors that track climate conditions, and automated alert mechanisms to prevent cold chain interruptions.
	Others	Minor topics that have not been assigned to the code frame.

# APPENDIX



## Vehicles in fleets

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

## Financing methods

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

## Electrified vehicles technologies

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

## Telematics

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

## Mobility policies

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

## Mobility solutions

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

## Charging policies

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

## Future challenges

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

# COMPANY SIZE SEGMENT DEFINITION



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

Small companies  
Medium companies  
Large companies

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

# STATISTICAL FOCUS: SIGNIFICANT EVOLUTIONS

## WHAT IS IT?

This barometer monitors changes between waves.

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



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

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

## HOW DOES IT WORK?

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

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

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

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

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

# THANK YOU