

FLEET AND MOBILITY BAROMETER 2025

COUNTRY REPORT



1 FLEET CHARACTERISTICS

2 FINANCING METHODS

3 ENERGY MIX

4 CONNECTED FLEETS

5 EMPLOYEE MOBILITY

6 FUTURE CHALLENGES

RESEARCH APPROACH

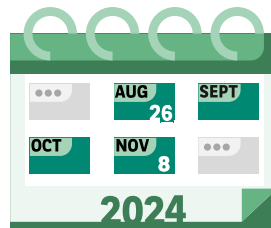


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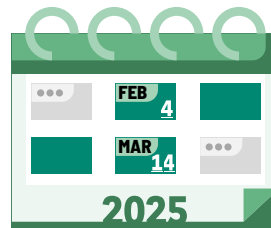
INTERVIEWS WITH
CORPORATE FLEET
DECISION MAKERS

**20-MINUTE
PHONE INTERVIEWS**

FIELDWORK



**Complementary
FIELDWORK**



READING NOTES ABOUT THE REPORT

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

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?

SAMPLE STRUCTURE AND SCOPE

QUOTAS ON COMPANY SIZE & INDUSTRY



COMPANY SIZE & SECTOR



Number of employees

1-99

100 to 249
/499/999

250/500
/1,000 +

TOTAL

CONSTRUCTION

16%

17%

29%

19%

MANUFACTURING

5%

2%

6%

5%

SERVICE INDUSTRY

60%

61%

44%

57%

TRADE

18%

20%

22%

19%

All countries

Weight of company size segment

53%

27%

20%



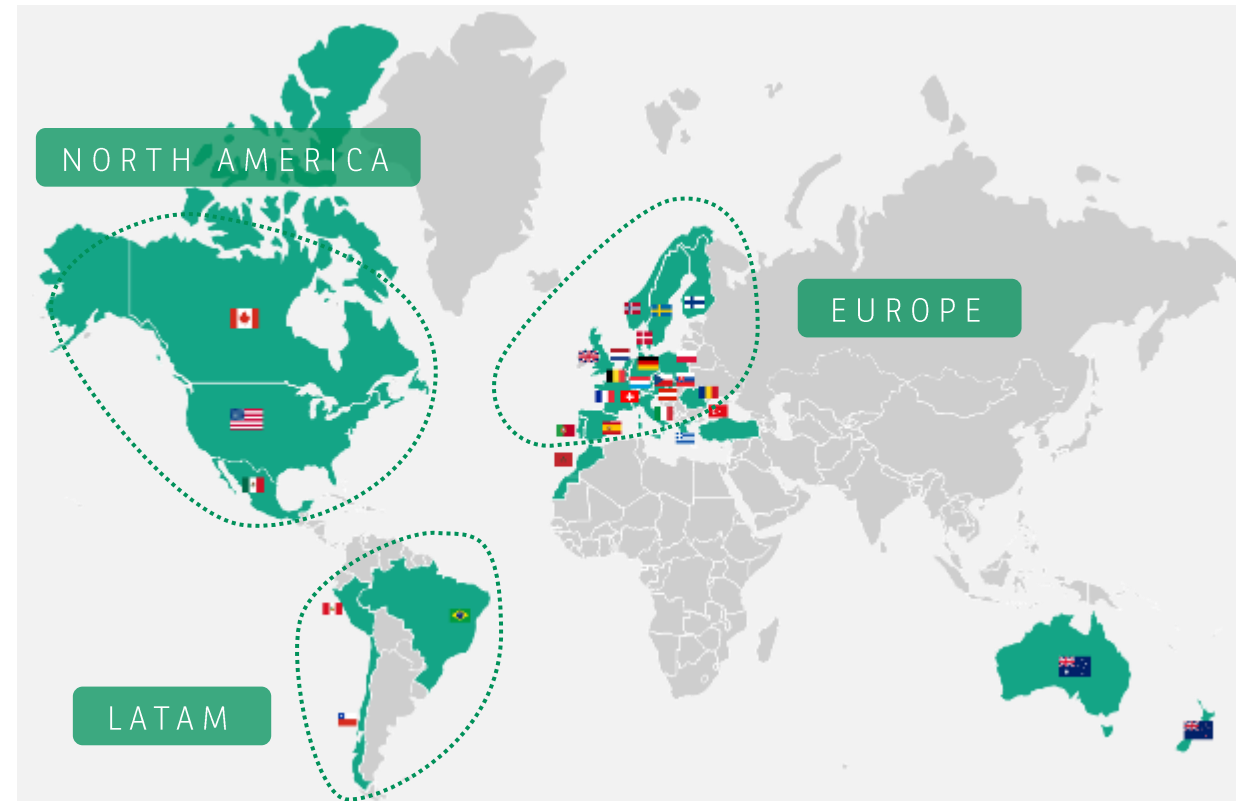
167

81

62

310

30 COUNTRIES - 3 REGIONAL BENCHMARKS



Morocco, Turkey, Australia and New Zealand: compared with Europe benchmark

KEY COUNTRY INSIGHTS



DESPITE PERSISTENT GLOBAL UNCERTAINTIES, AUSTRALIAN COMPANIES REMAIN STRONGLY CONFIDENT ABOUT THE FUTURE OF THEIR FLEETS

90% anticipate their fleet will either remain stable or grow in the next 3 years (with 21% expecting growth, driven by business development)

81% include or consider including second-hand vehicles, mainly used as pool cars or tool cars



OPERATIONAL LEASING IS NOT THE CURRENT PREFERRED FINANCING METHOD BUT SHOWS GROWTH POTENTIAL

26% are considering either introducing operational leasing or further increasing it in the next 3 years

11% report operational leasing is their current primary financing method



FLEET ELECTRIFICATION IS GAINING GROUND, DESPITE A RELATIVE WAIT-AND-SEE APPROACH

64% have already implemented electrified technologies or are considering to do so for their passenger car fleets (with 55% already using electrified vehicles, increasing vs 2024)

57% consider the lack of charging infrastructure as the main barrier to BEV adoption for passenger cars. But **86%** have or plan to implement a charging strategy



A CONFIRMED CONNECTIVITY SAY-DO GAP: A HIGH LEVEL OF EQUIPMENT BUT STILL A LIMITED USE OF TELEMATICS DATA

37% have adopted telematics tools (for passenger cars, LCVs or both)

63% equipped use or consider using telematics data, with only 16% already using it to date



A SIGNIFICANT COMMITMENT TO EMPLOYEE MOBILITY, DRIVEN BY HR NEEDS

42% have already implemented personal vehicle expense reimbursement or are considering to do so, confirming its position as one of the most attractive mobility options for companies

56% to **53%** quote HR related needs among their key motivations to implement mobility solutions and policies, followed by tax benefits (45% to 47%)



GRADUAL RECOGNITION OF THE NEED TO INTEGRATE A DECARBONIZATION PATH, UNDER INCREASING ECONOMIC CONSTRAINTS

17% have set targeted decarbonization goals to date (with 24% currently evaluating such goals)

60% quote mitigating the increase of TCO among their main challenges for the next 3 years, far ahead of other challenges



01

FLEET CHARACTERISTICS

What are the key characteristics of fleets?

For 2025, Australian companies surveyed remain strongly confident about the future of their fleets

90% of companies surveyed anticipate that their fleets will either remain stable or grow over the next three years, with **21%** expecting growth., aligned with the European average. This trend has been steady for two years.

This steady trend is consistent across different company sizes and vehicle types (passenger cars and light commercial vehicles).

Fleet growth is primarily driven by business development

72% of Australian companies surveyed expecting fleet growth cite business development as the primary reason, consistent with the European trend (73%).

In Australia, this is followed by HR related needs (**45%**) and the plan to offer vehicles to employees previously ineligible for company cars (**44%**)

Conversely, plans to propose shared vehicles and tax decreases appear less of a driver in Australia (**30%** and **11%** respectively)..

The share of companies stating they have or consider having second-hand vehicles in their fleet is significant

25% of Australian companies surveyed already include second-hand vehicles, and an additional **55%** are considering doing so in the next 3 years.

Second-hand vehicles are less present in Australian fleets than the average in European ones (39%).

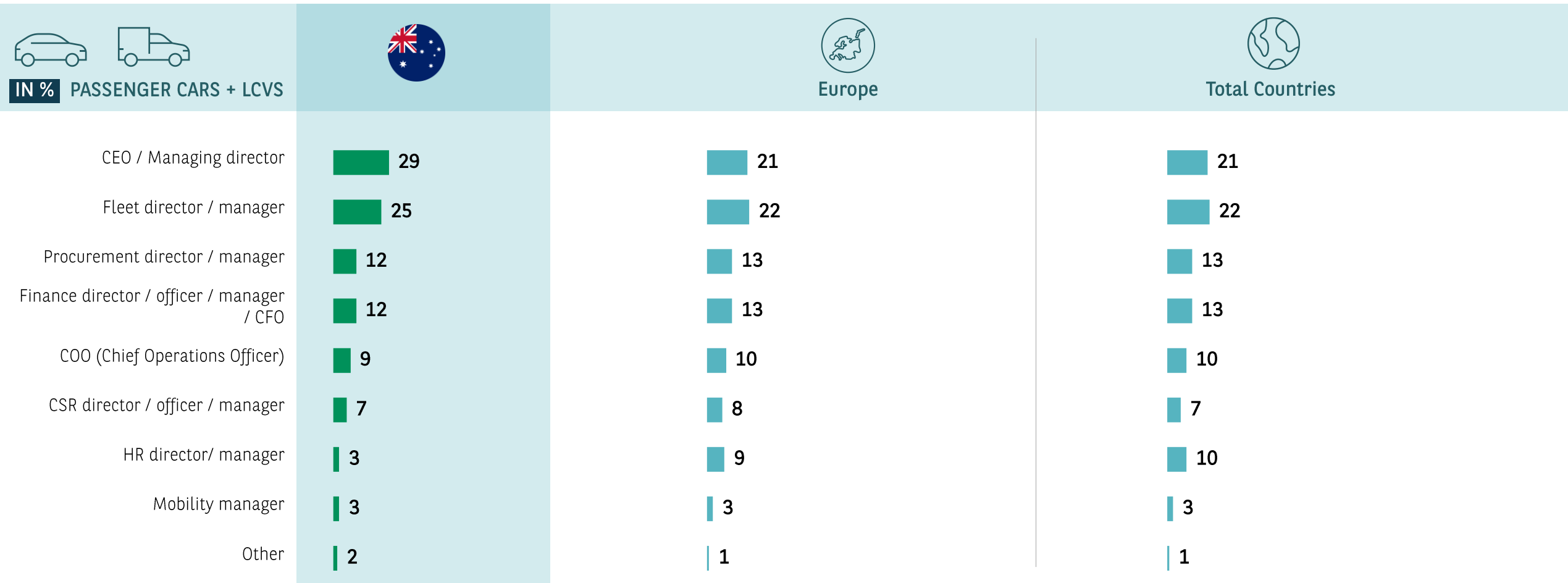
Use or consideration of second-hand vehicles is more common for passenger car (**66%**) than for light commercial vehicle (**48%**).

In terms of usage, second-hand passenger cars are mainly used as pool cars (70%) and tool cars (70%).

RESPONDENT POSITION

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed, 29% of the respondents are CEO / Managing director.



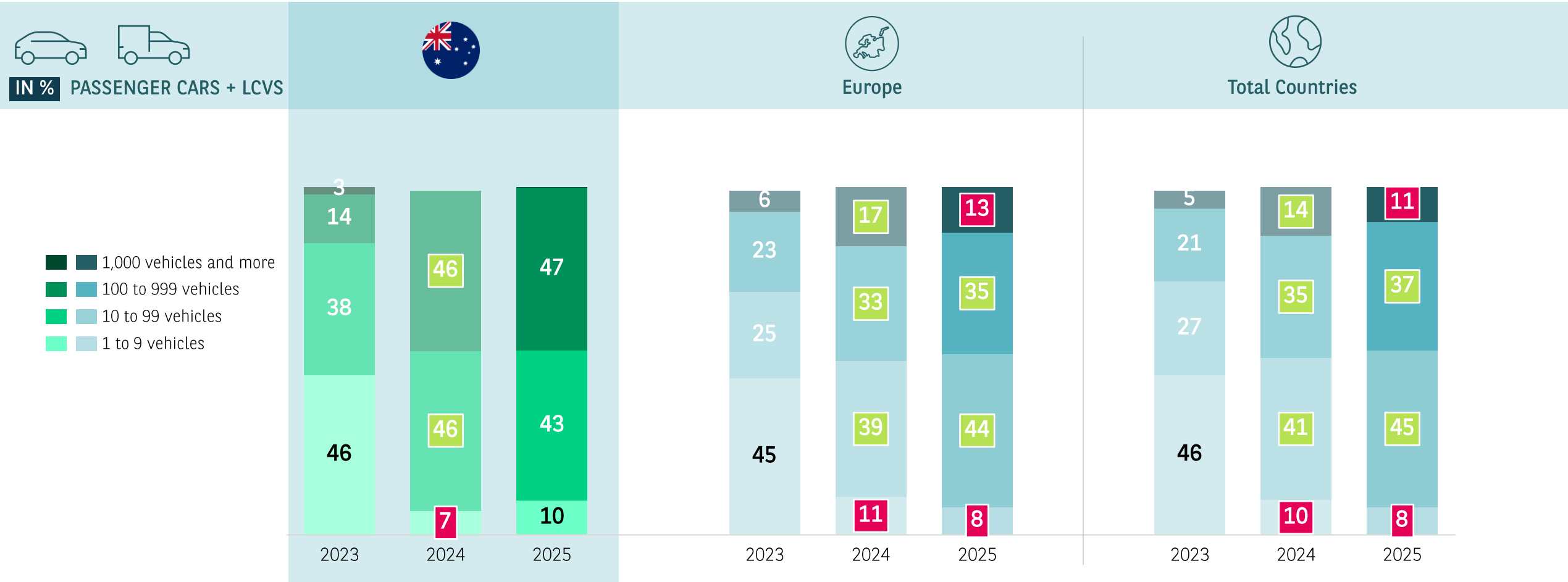
SC5TER. Could you please specify your exact position in the company?

Basis: companies with corporate vehicles = 100%

NUMBER OF VEHICLES IN FLEETS

HOW TO READ THE RESULTS ?

In 2025, the vehicle fleets reported by the Australian fleet managers surveyed consist of : 10% with 1-9 vehicles, 43% with 10-99 vehicles, 47% with 100-999 vehicles and 1% with 1,000 or more.



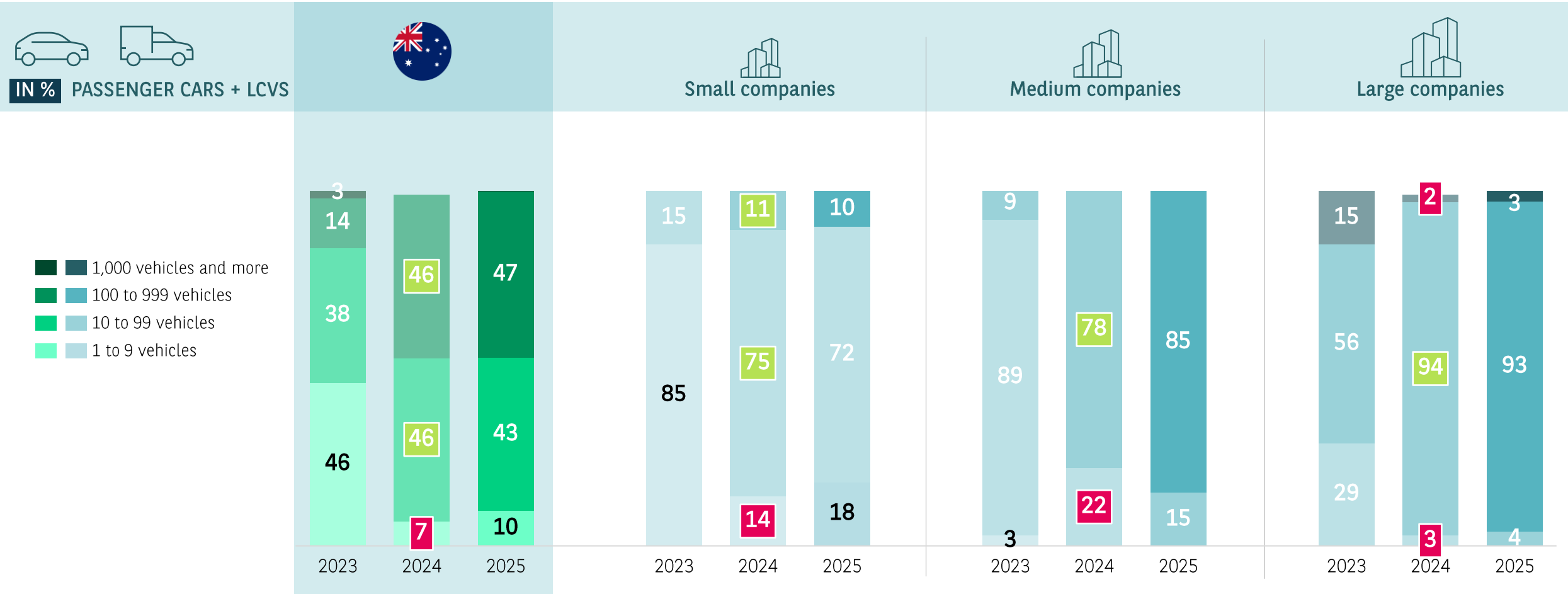
A5/ZDA5. Can you please tell us the total number of vehicles of less than 3.5 tons in your fleet?
Basis: companies with corporate vehicles = 100%

X% Significantly higher/lower vs. previous wave

NUMBER OF VEHICLES IN FLEETS

HOW TO READ THE RESULTS ?

In 2025, the vehicle fleets reported by the Australian fleet managers surveyed consist of : 10% with 1-9 vehicles, 43% with 10-99 vehicles, 47% with 100-999 vehicles and 1% 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 2025, the passenger cars fleets reported by the Australian fleet managers surveyed consist of : 36% with 1-9 vehicles, 46% with 10-99 vehicles, 17% with 100-999 vehicles and 0% with 1000 or more. And LCV fleets are composed of: 23% with 1-9 vehicles, 39% with 10-99 vehicles, 37% with 100-999 vehicles and 0% with 1,000 or more.



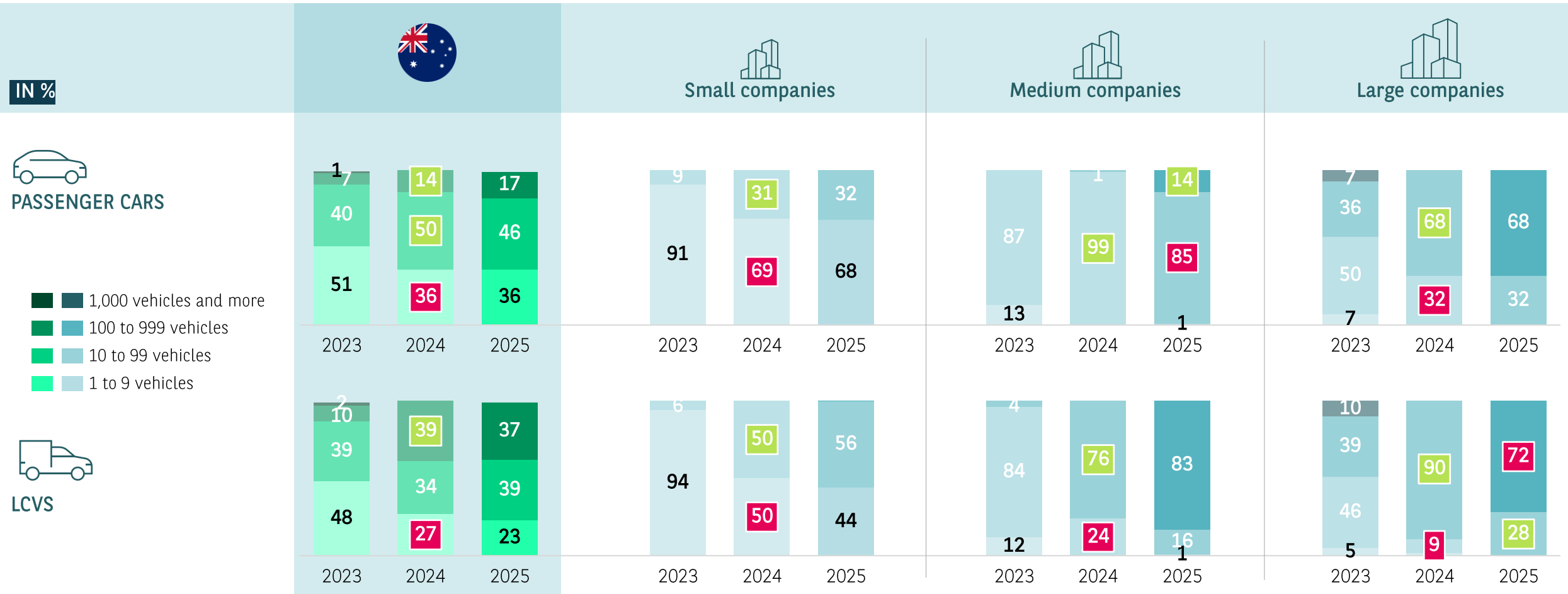
A5F. Can you please tell us the total number of cars and then the number of LCV's or vans in your fleet?
Basis: companies with corporate vehicles = 100%

X% Significantly higher/lower vs. previous wave

NUMBER OF PASSENGER CARS AND LCVS IN FLEETS

HOW TO READ THE RESULTS ?

In 2025, the passenger cars fleets reported by the Australian fleet managers surveyed consist of : 36% with 1-9 vehicles, 46% with 10-99 vehicles, 17% with 100-999 vehicles and 0% with 1000 or more. And LCV fleets are composed of: 23% with 1-9 vehicles, 39% with 10-99 vehicles, 37% with 100-999 vehicles and 0% with 1,000 or more.



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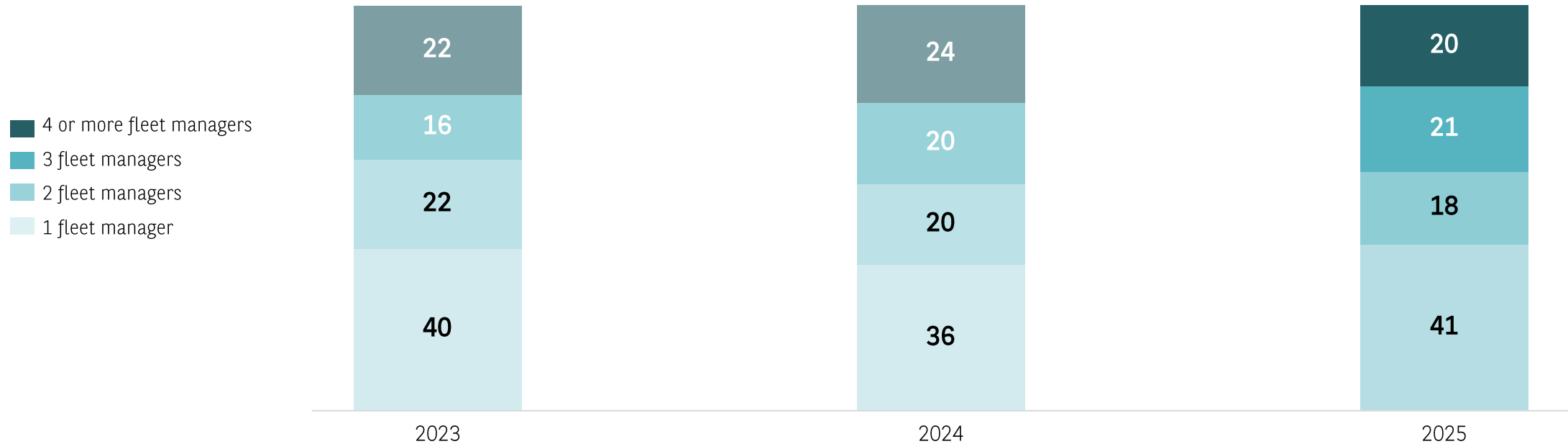
NUMBER OF FLEET MANAGERS

HOW TO READ THE RESULTS ?

In 2025, 41% of the Australian companies surveyed have 1 fleet manager.

Local question

IN %



IT16. How many people are managing fleet vehicles in your company? We don't speak here about equivalence Full Time Employees but about number of employees?
Basis: companies with corporate vehicles = 100%

X% Significantly higher/lower vs. previous wave

OUTSOURCING OF SERVICES IN TERMS OF FLEET MANAGEMENT

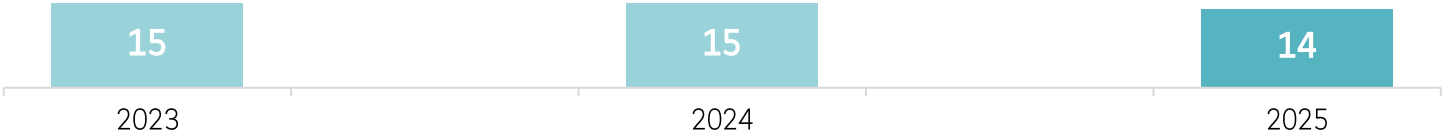
HOW TO READ THE RESULTS ?

In 2025, 14% of the Australian companies surveyed outsource services in terms of fleet management.

Local question

IN % YES

Outsource services
in terms of fleet
management



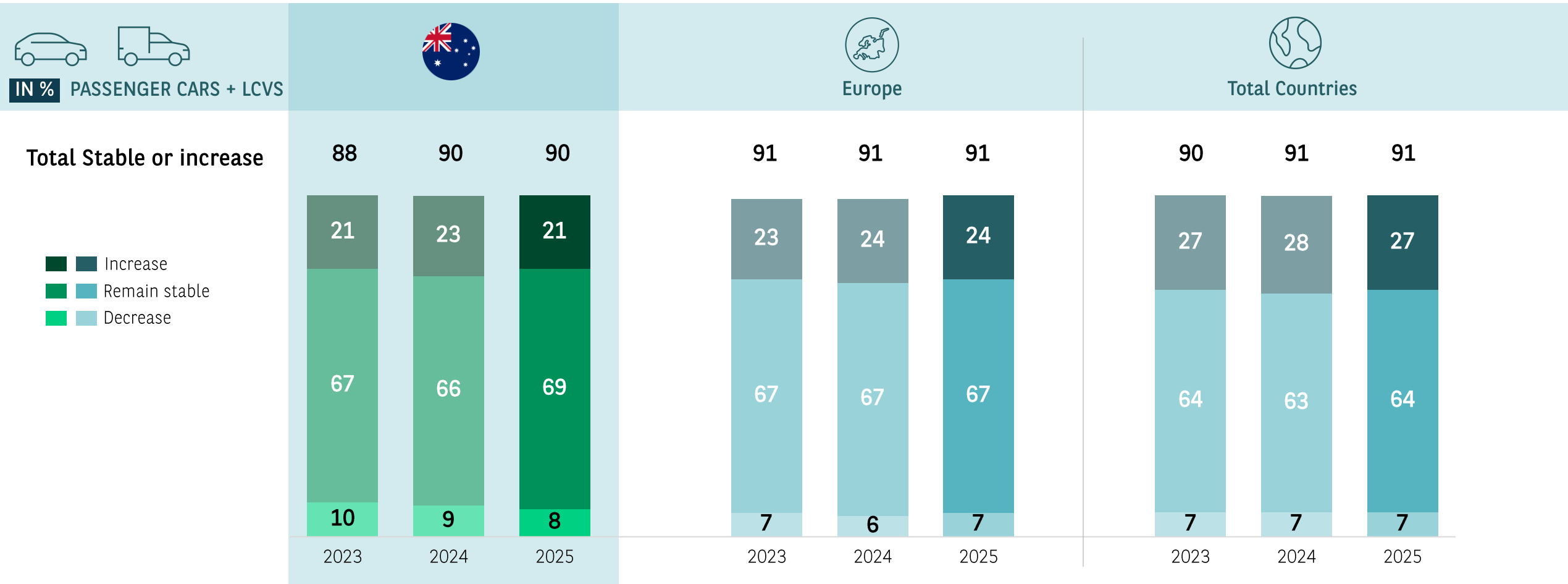
IT18. In your company, do you currently outsource services in terms of fleet management?
Basis: companies with corporate vehicles = 100%

X% Significantly higher/lower vs. previous wave

FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 90% of the companies expect their fleet to remain stable or to increase in the next 3 years.



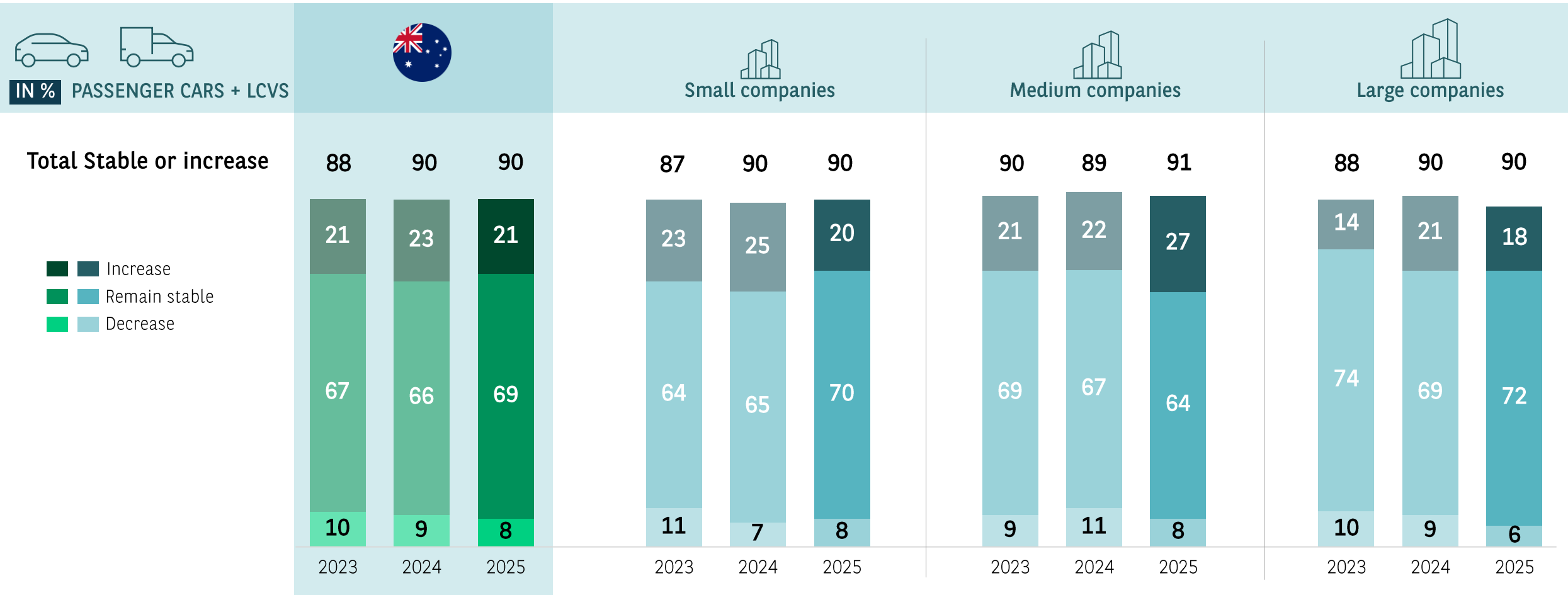
A8. In the next three years, do you think that the total number of vehicles in your company fleet will increase, decrease or remain the same?
 Basis: companies with corporate vehicles = 100%

X% Significantly higher/lower vs. previous wave

FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 90% of the companies expect their fleet to remain stable or to increase in the next 3 years.



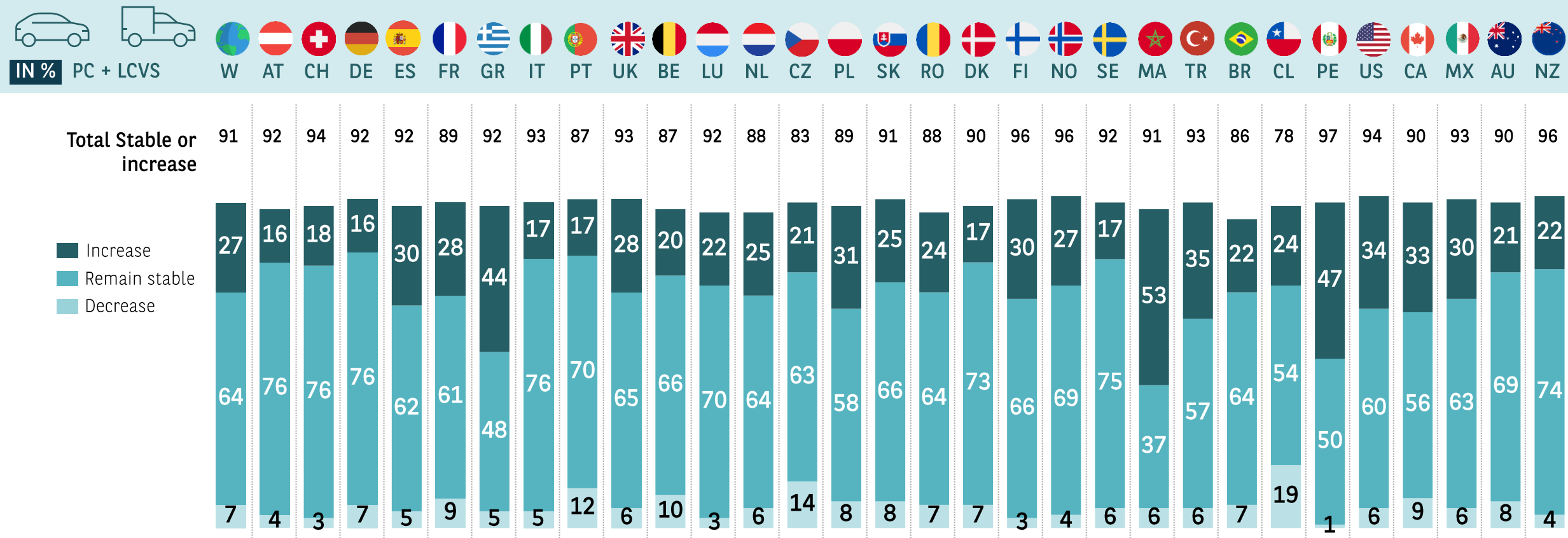
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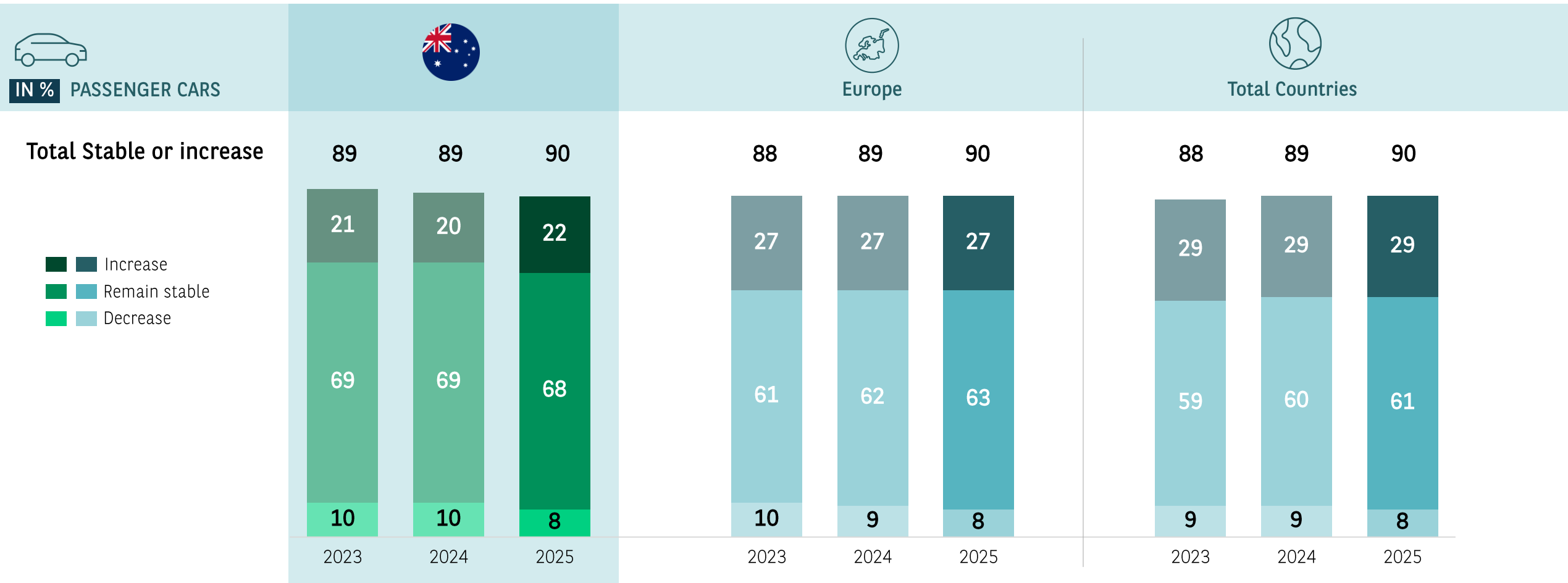
A8. In the next three years, do you think that the total number of vehicles in your company fleet will increase, decrease or remain the same?

Basis: companies with corporate vehicles = 100%

PASSENGER CAR FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 90% of the companies expect their passenger car fleet to remain stable or to increase in the next 3 years.



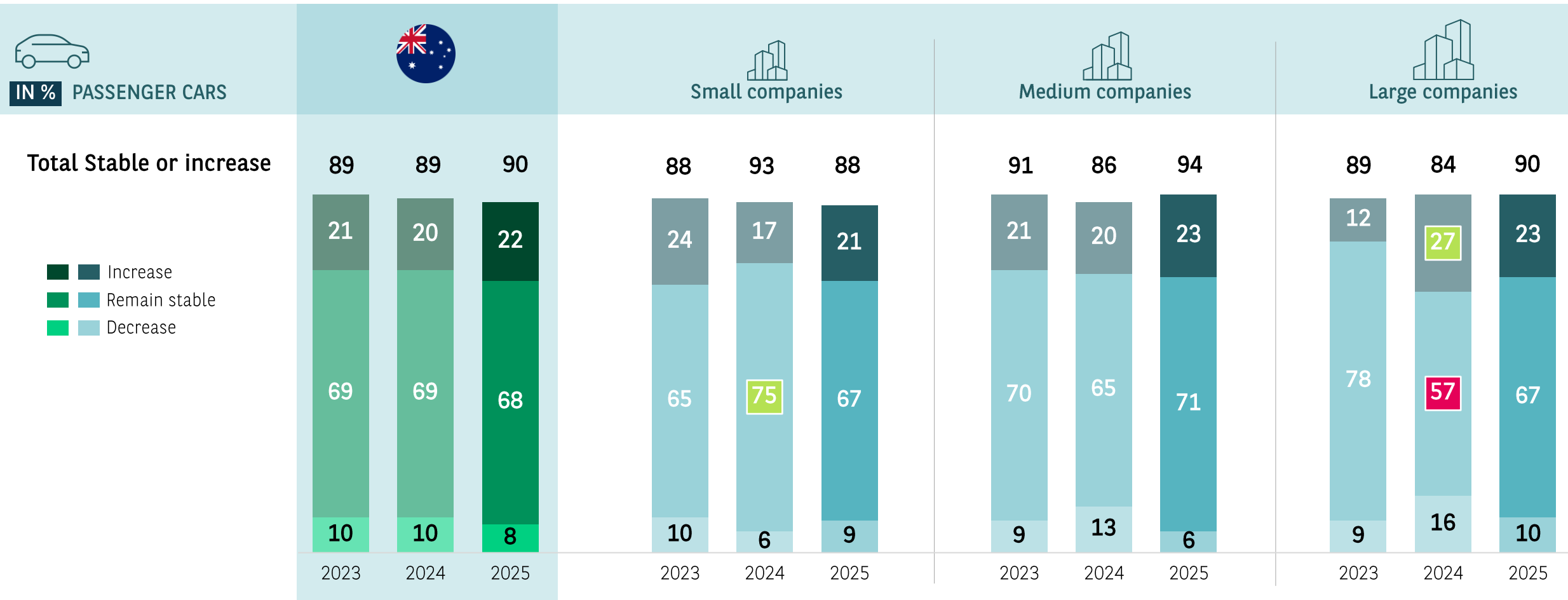
A9. In the next three years, do you think that the total number of your passenger cars will...?
Basis: companies with passenger cars

X% Significantly higher/lower vs. previous wave

PASSENGER CAR FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 90% of the companies expect their passenger car fleet to remain stable or to increase in the next 3 years.



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

X% Significantly higher / lower vs. previous wave

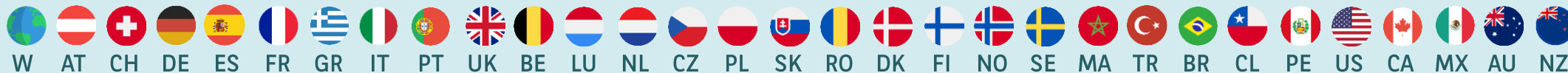
PASSENGER CAR FLEET GROWTH POTENTIAL

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Among the Australian companies surveyed in 2025, 90% of the companies expect their passenger car fleet to remain stable or to increase in the next 3 years.

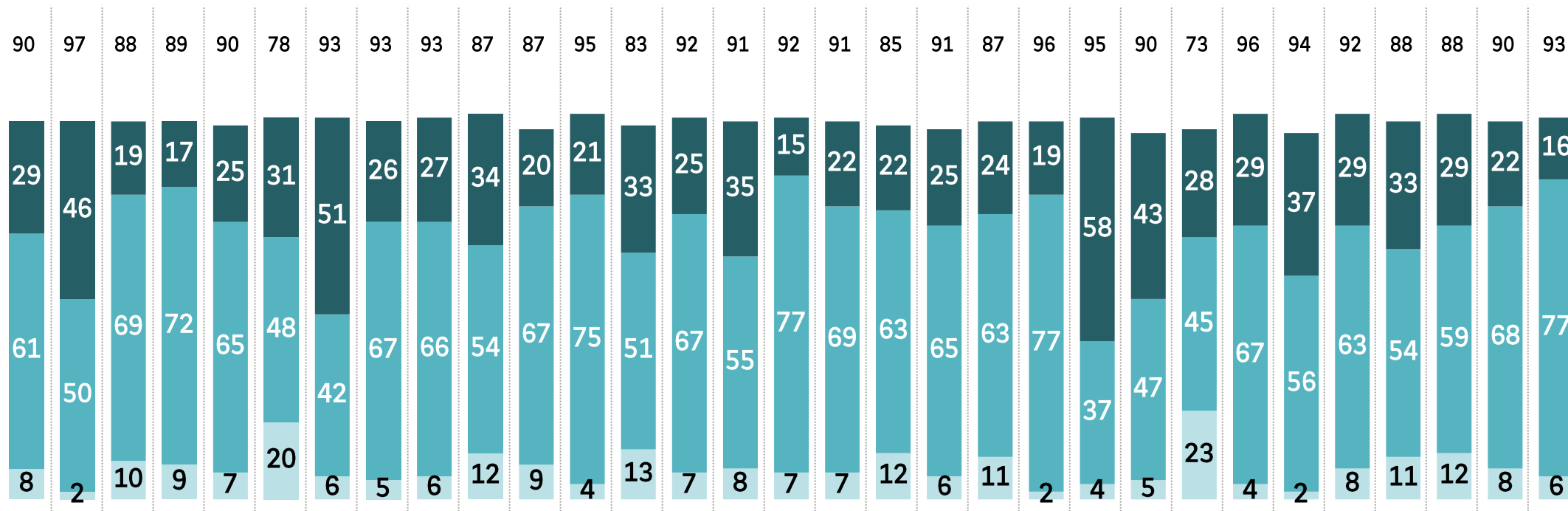


IN % CARS



Total Stable or increase

■ Increase
■ Remain stable
■ Decrease



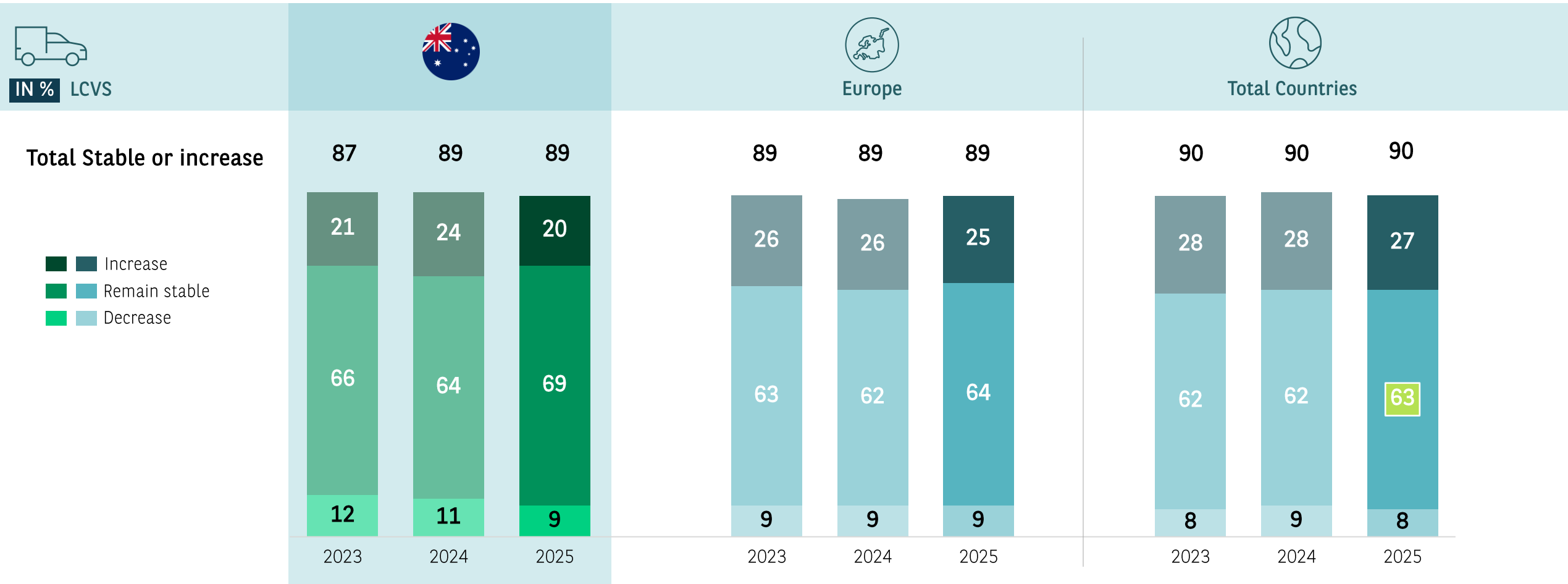
A9. In the next three years, do you think that the total number of your passenger cars will...?

Basis: companies with passenger cars

LCV FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 89% of the companies expect their LCV fleet to remain stable or to increase in the next 3 years.



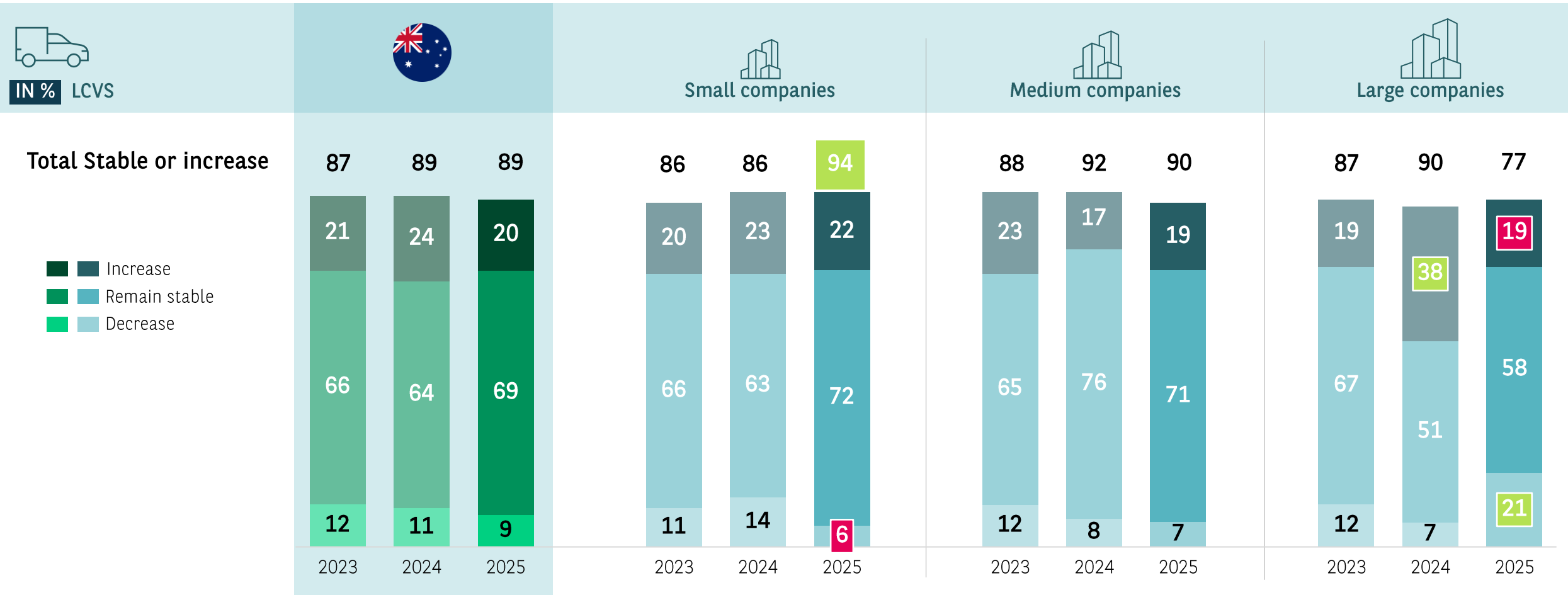
A10. In the next three years, do you think that the total number of your light commercial vehicles or vans will...?
Basis: companies with LCVs

X% Significantly higher/lower vs. previous wave

LCV FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 89% of the companies expect their LCV fleet to remain stable or to increase in the next 3 years.



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

X% Significantly higher / lower vs. previous wave

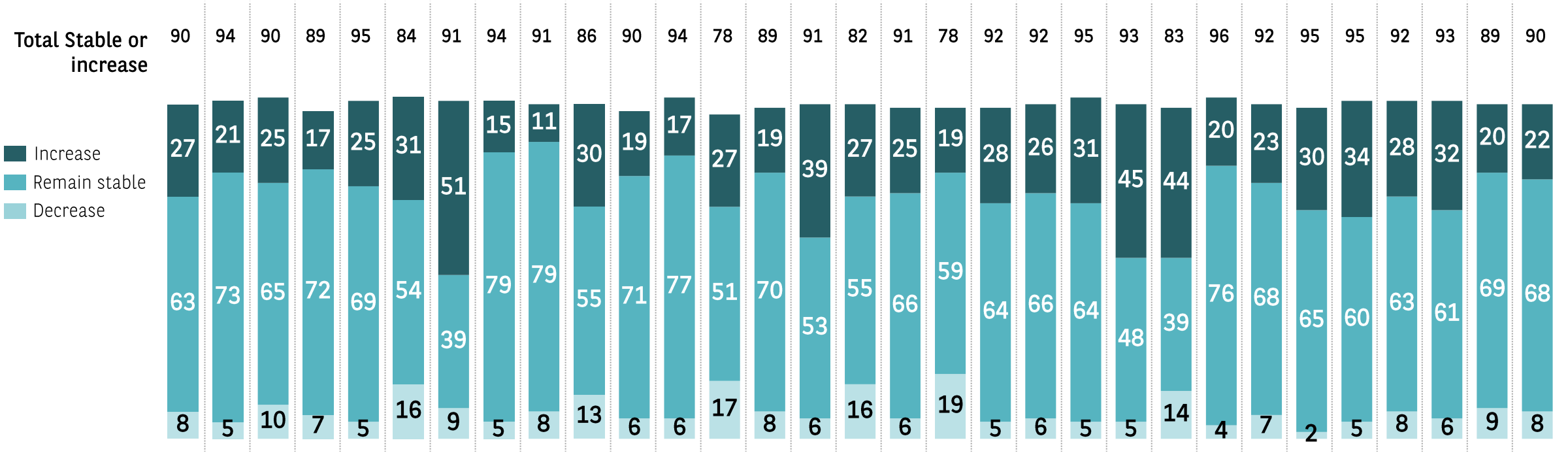
LCV FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 89% of the companies expect their LCV fleet to remain stable or to increase in the next 3 years.



IN % LCVS



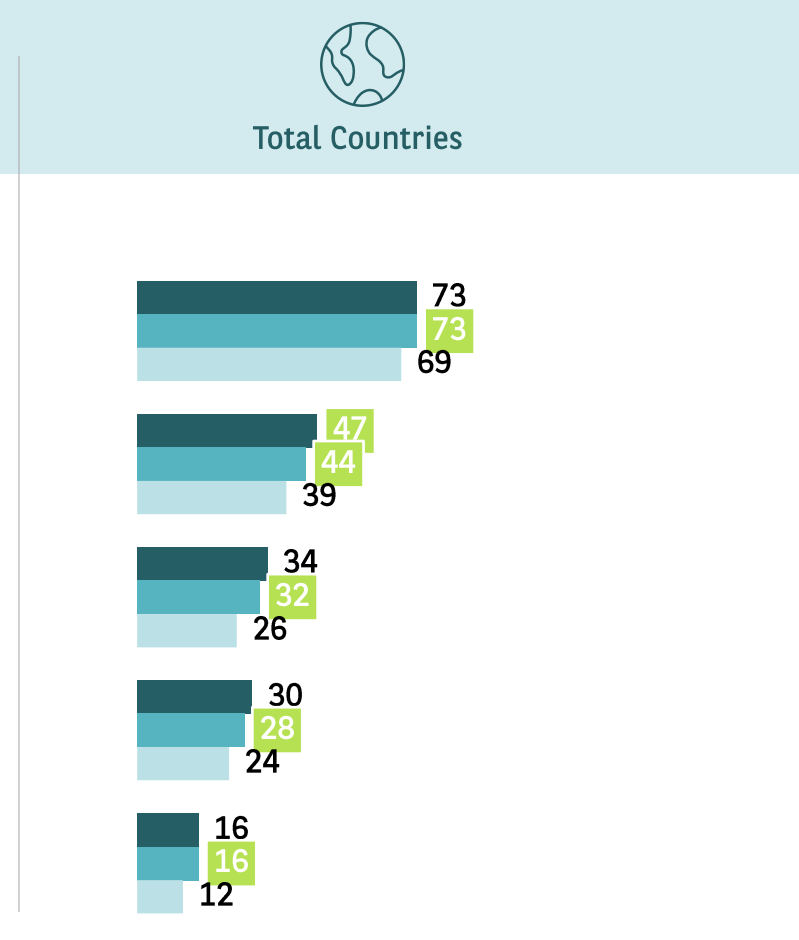
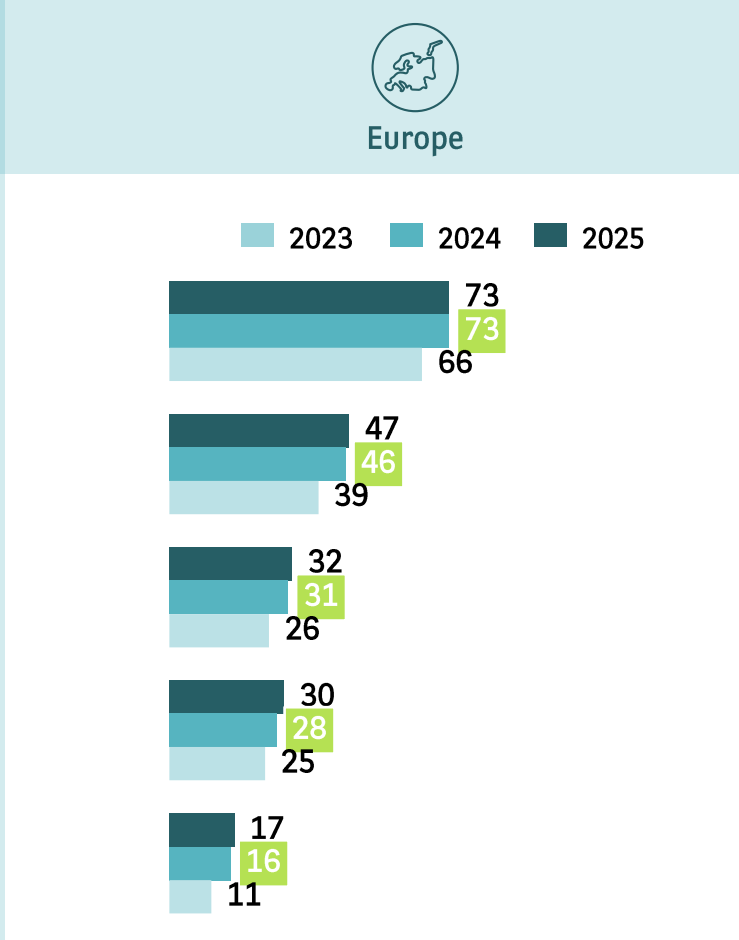
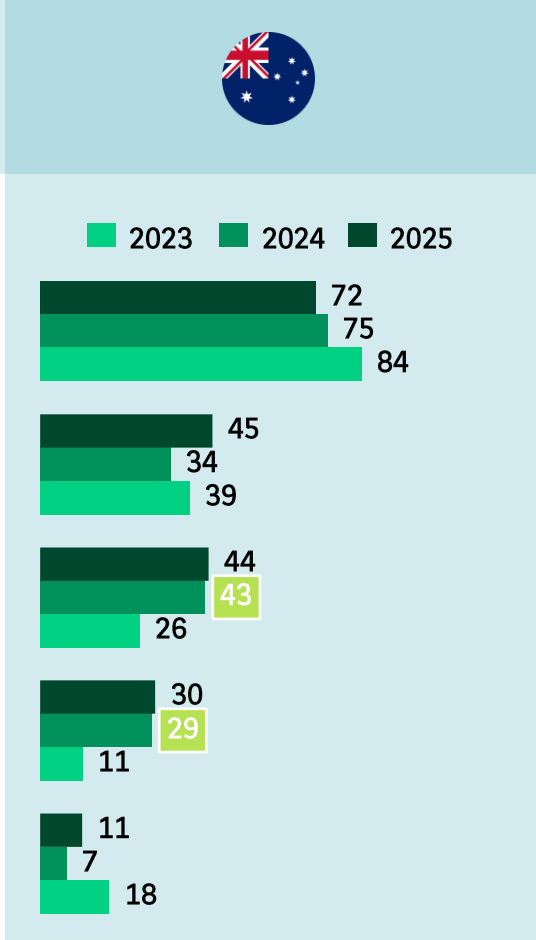
A10. In the next three years, do you think that the total number of your light commercial vehicles or vans will...?
Basis: companies with LCVs

REASONS FOR FUTURE FLEET INCREASE

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 72% of the companies expecting an increase of their fleet explain it by: Because your company is growing or developing a new activity that requires company vehicles.

IN % PASSENGER CARS + LCVS

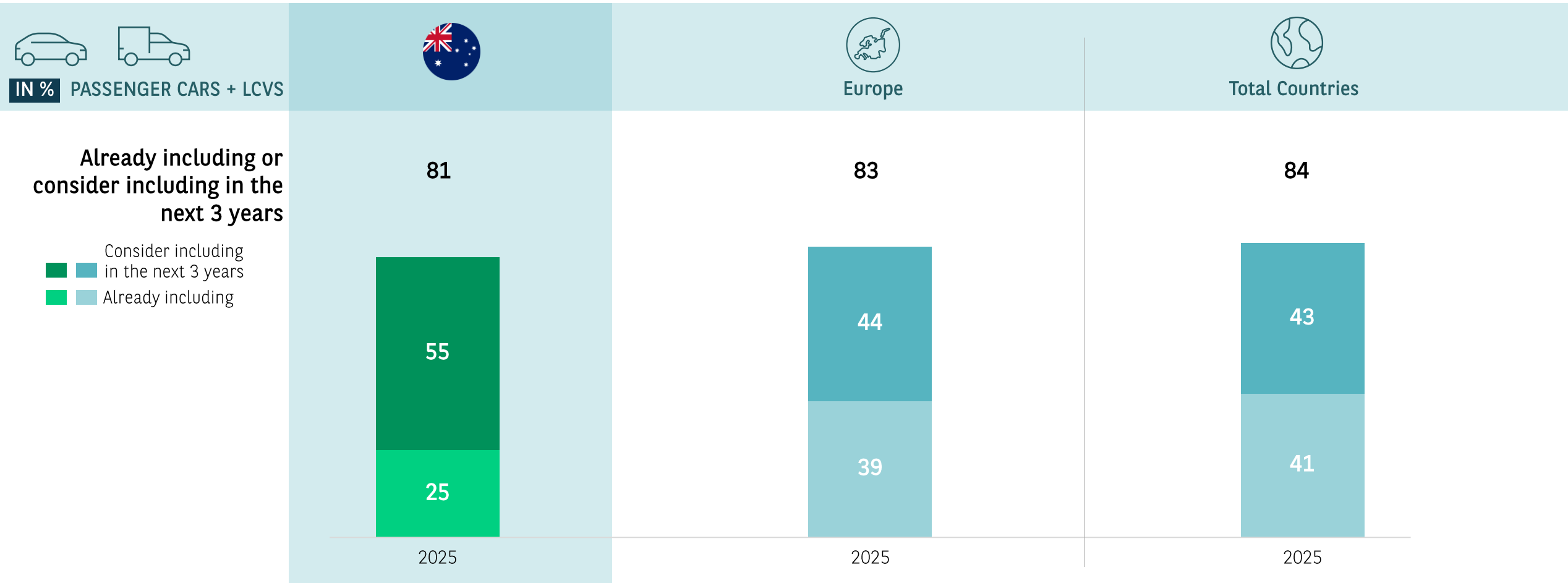


A8A. Why do you think the total number of vehicles in your company fleet will increase?
Basis: companies expecting an increase of the fleet

X% Significantly higher / lower vs. previous wave

HOW TO READ THE RESULTS ?

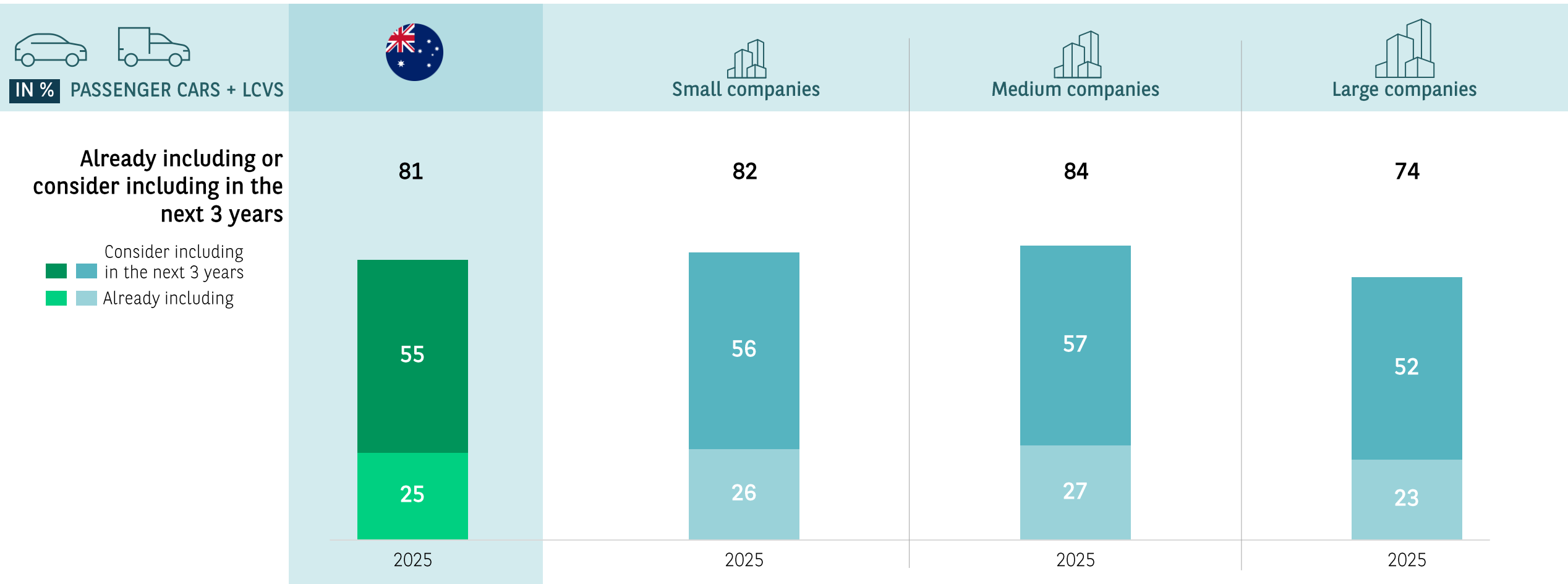
Among the Australian companies surveyed in 2025, 81% of the companies are already including vehicles that were not new when acquired or are considering doing so in the next 3 years.



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%

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 81% 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?

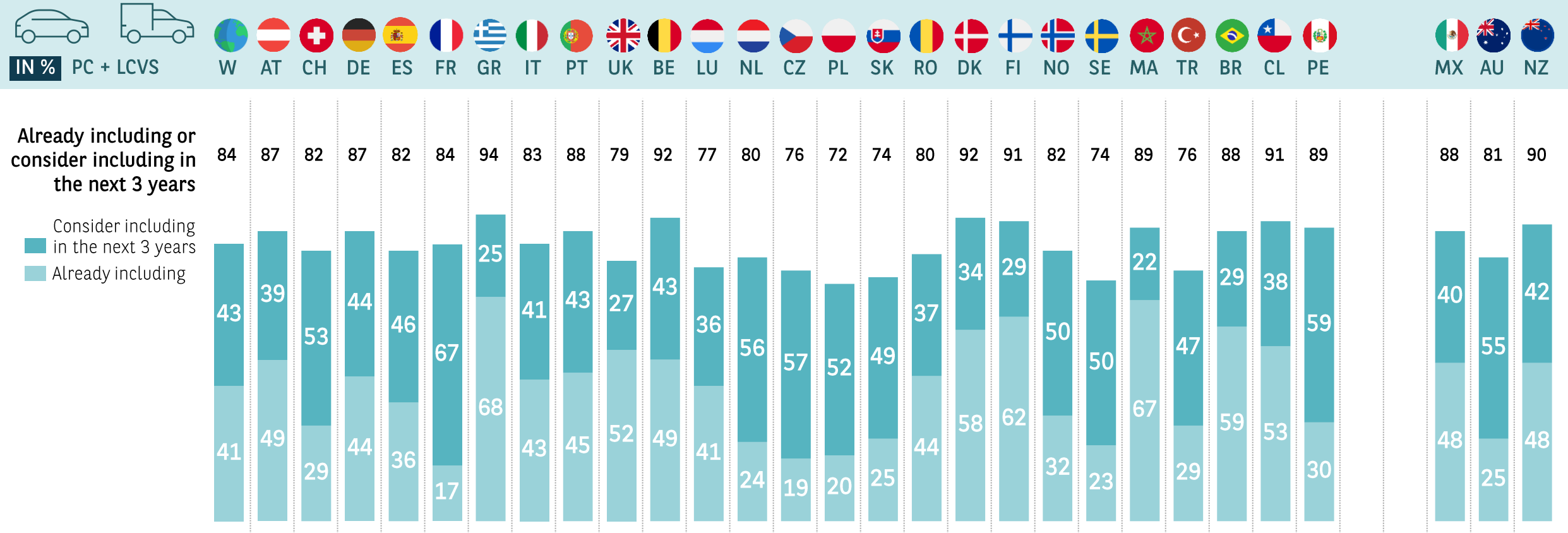
Basis: companies with corporate vehicles = 100%

USED / SECOND-HAND VEHICLES POSSESSION

New question

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 81% of the companies are already including vehicles that were not new when acquired or are considering doing so in the next 3 years.

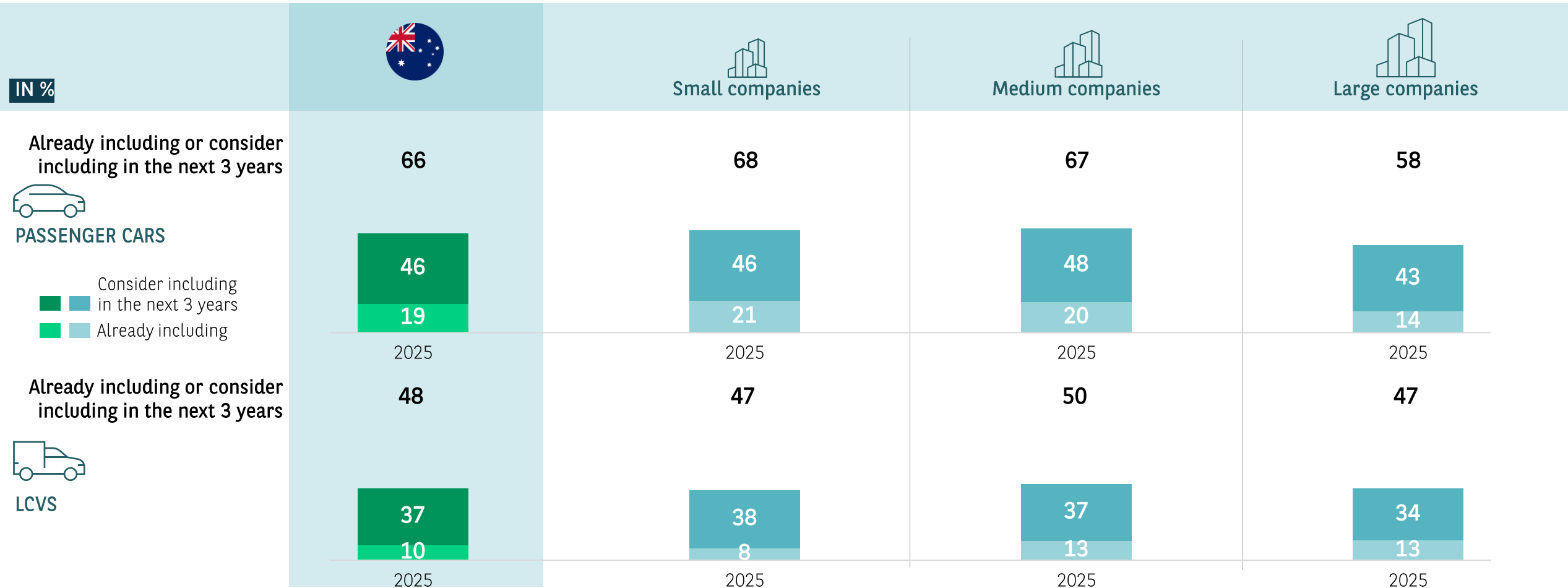


A14. Does your fleet include vehicles that were not new when you acquired them, or do you consider including some in the next 3 years?

Basis: companies with corporate vehicles = 100%

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 66% of the companies are already including or are considering including passenger cars that were not new when acquired. 48% of the companies are already including or are considering including LCVs that were not new when acquired.



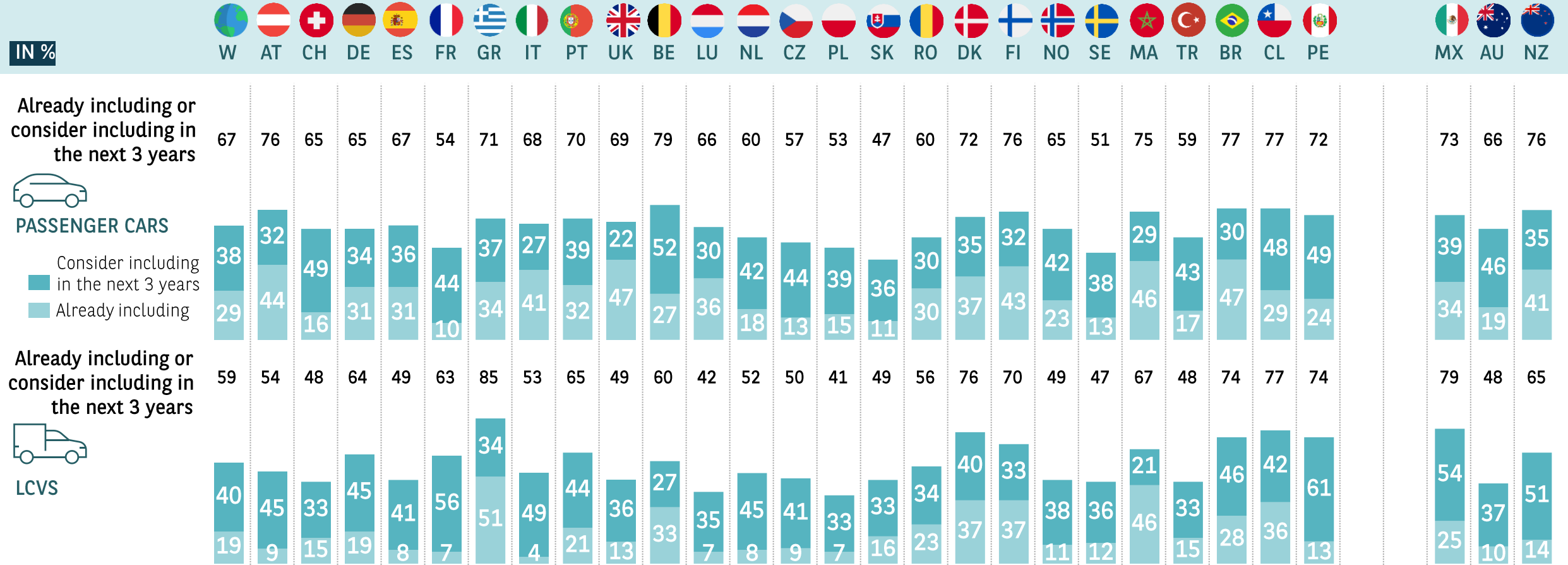
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USED / SECOND-HAND VEHICLES POSSESSION

New question

HOW TO READ THE RESULTS ?

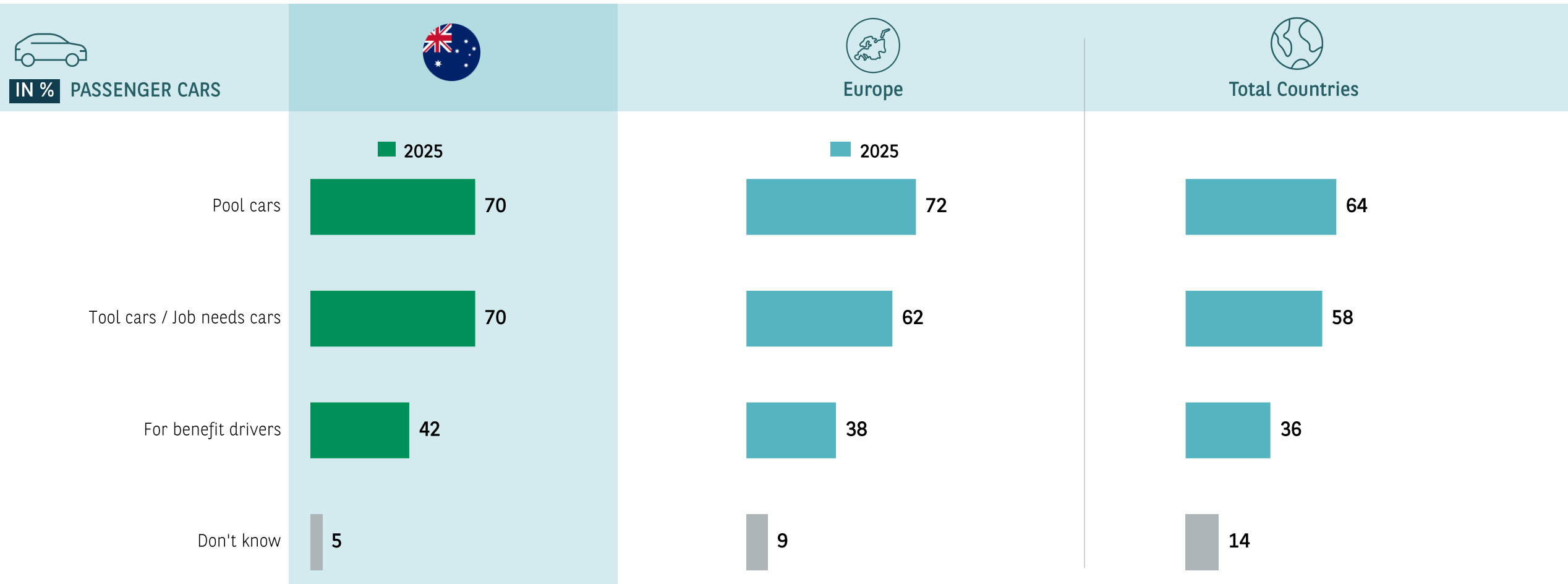
Among the Australian companies surveyed in 2025, 66% of the companies are already including or are considering including passenger cars that were not new when acquired. 48% of the companies are already including or are considering including LCVs that were not new when acquired.



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%

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 70% of the companies that are already including used passenger cars are using them as Pool cars.



A15. Considering the passenger cars that were, or will be, not new when acquired: for which type(s) of use?
Basis: Basis: companies with used passenger cars

02

FINANCING METHODS

How do companies finance their fleets?



Outright purchase remains the main financing method used by almost half Australian companies surveyed

49% of Australian companies surveyed use outright purchase as main financing method for their fleets, above the European average (31%). Financial leasing is less developed and concerns 18% of Australian companies surveyed, followed by 11% using operational leasing. Both stand below the European average (29% and 27% respectively).

Operational leasing shows a higher penetration among Medium and Large companies.

The potential for growth in Operational leasing / Full-service leasing remains stable vs 2024

26% of Australian companies surveyed are considering either introducing full-service leasing or expanding it within their fleet financing strategies, below the European average (36%).

Australian fleet managers show a limited interest in consulting expertise or additional services

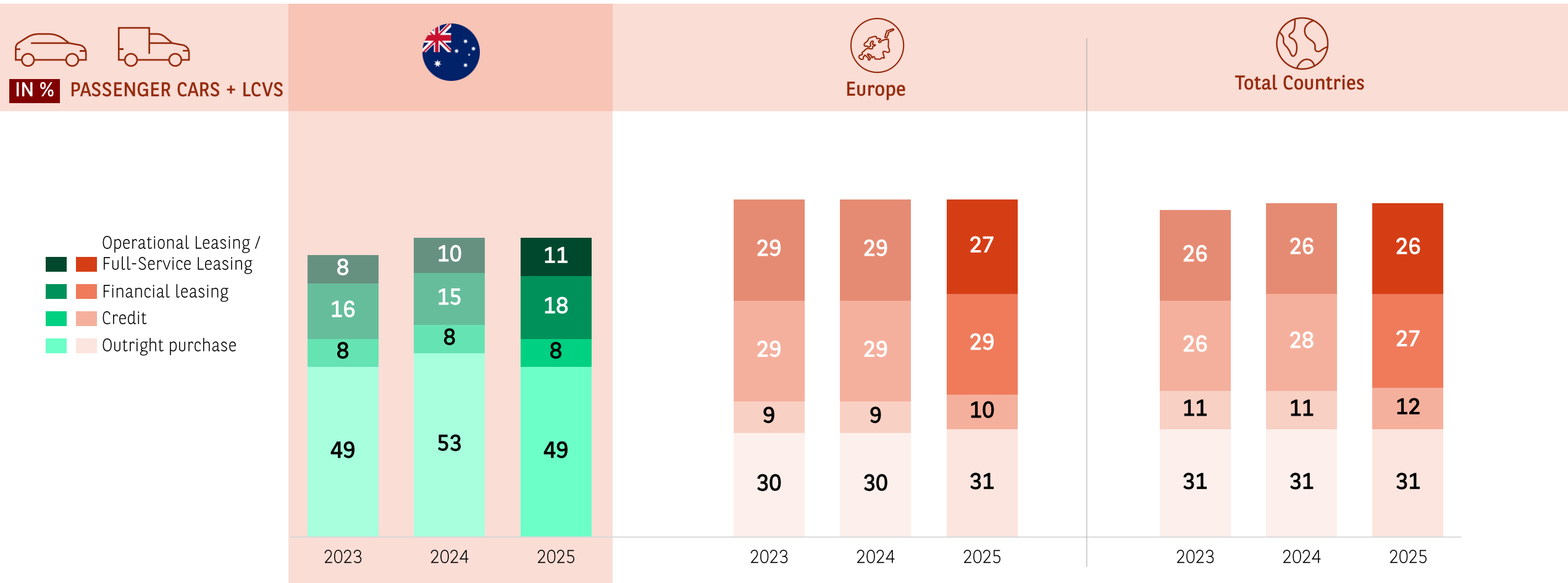
10% of fleet managers surveyed show some interest in consulting expertise to optimize their costs and fleet management.

19% would be interested in at least one additional service or product concerning their fleet management.

MAIN FLEET FINANCING METHOD

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 11% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their company vehicles.



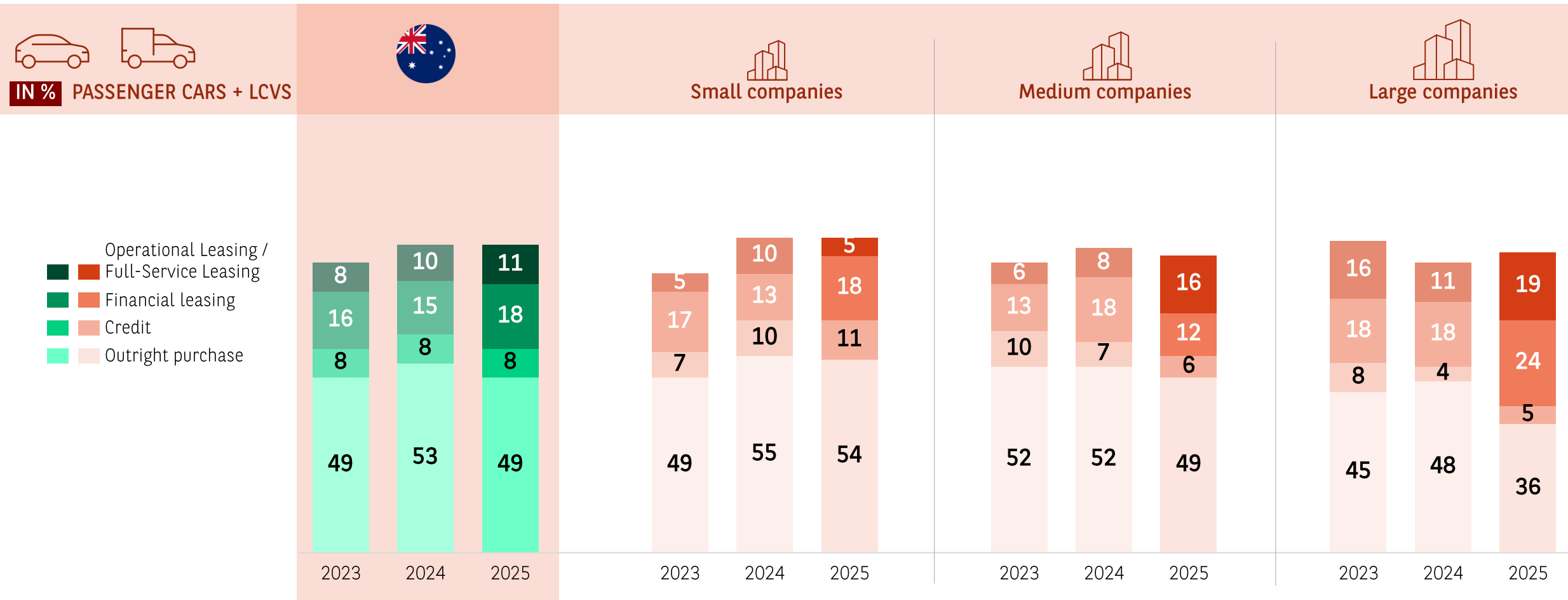
B2. What is the main method used to finance your company vehicles today?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

MAIN FLEET FINANCING METHOD

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 11% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their company vehicles.



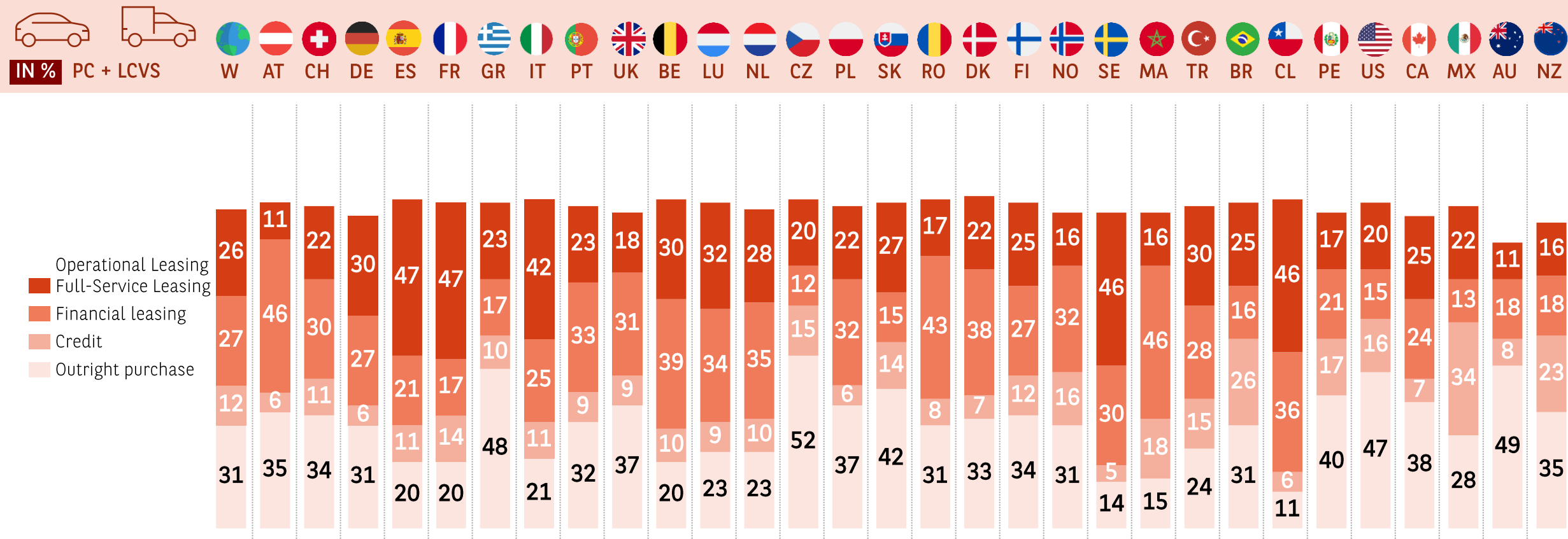
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MAIN FLEET FINANCING METHOD

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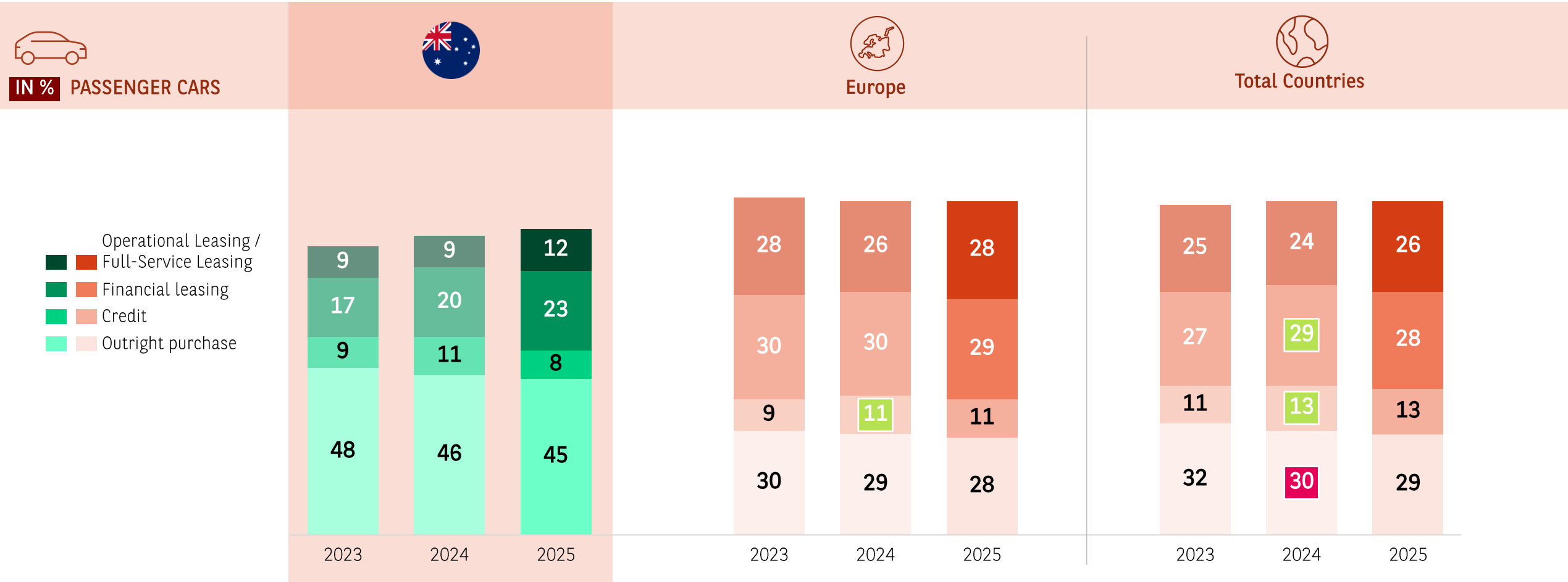


B2. What is the main method used to finance your company vehicles today?
Basis: companies with corporate vehicles = 100%

MAIN PASSENGER CARS FINANCING METHOD

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 12% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their passenger cars.



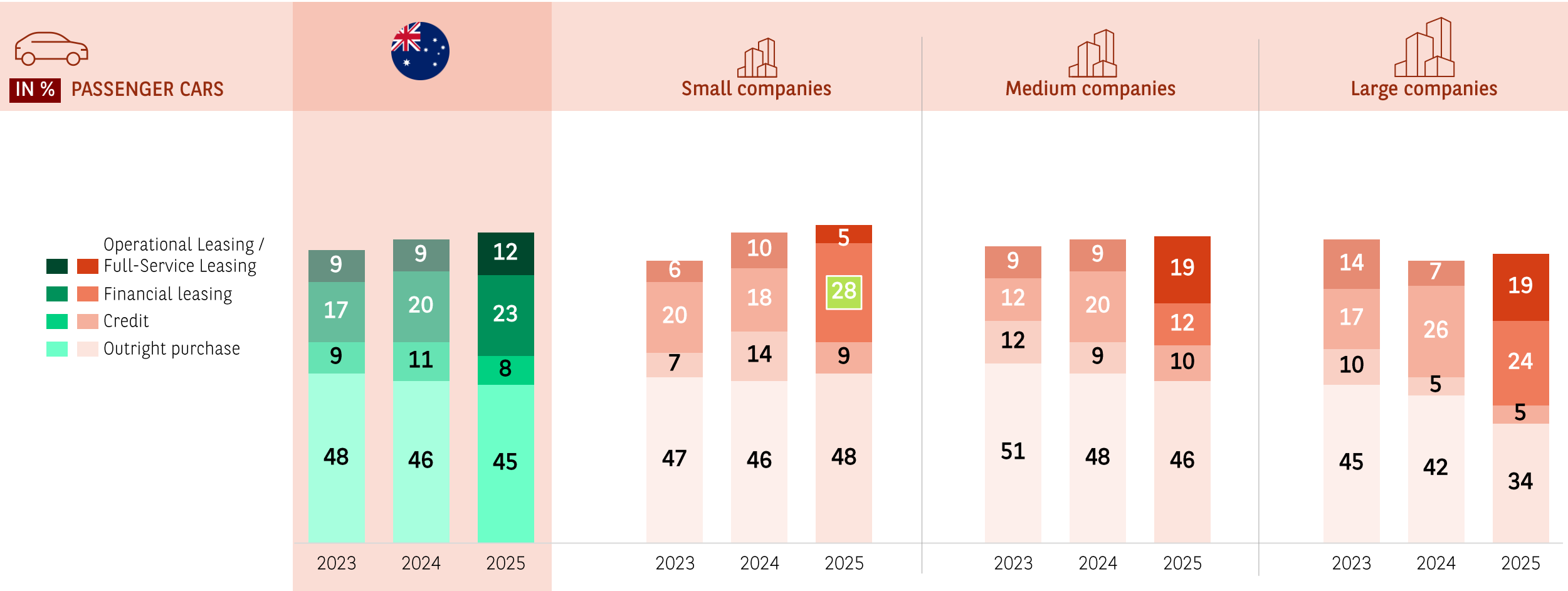
B3. And what is the main method used to finance your passenger cars today?
Basis: companies with passenger cars

X% Significantly higher / lower vs. previous wave

MAIN PASSENGER CARS FINANCING METHOD

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 12% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their passenger cars.



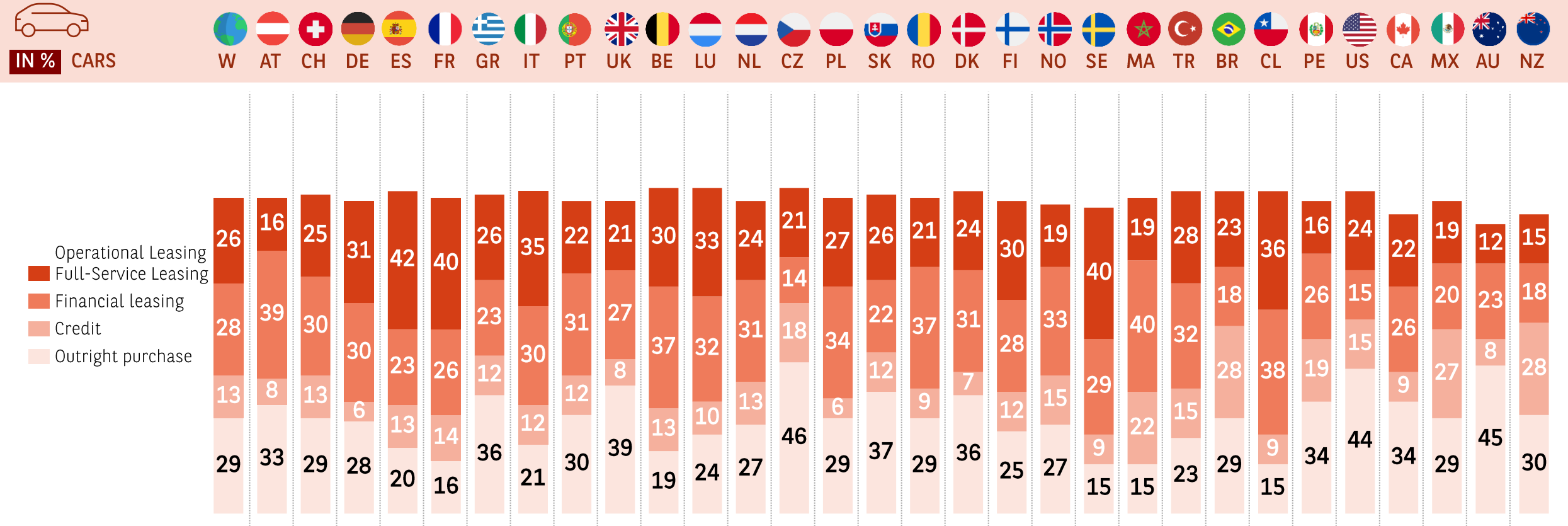
B3. And what is the main method used to finance your passenger cars today?
Basis: companies with passenger cars

X% Significantly higher / lower vs. previous wave

MAIN PASSENGER CARS FINANCING METHOD

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 12% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their passenger cars.

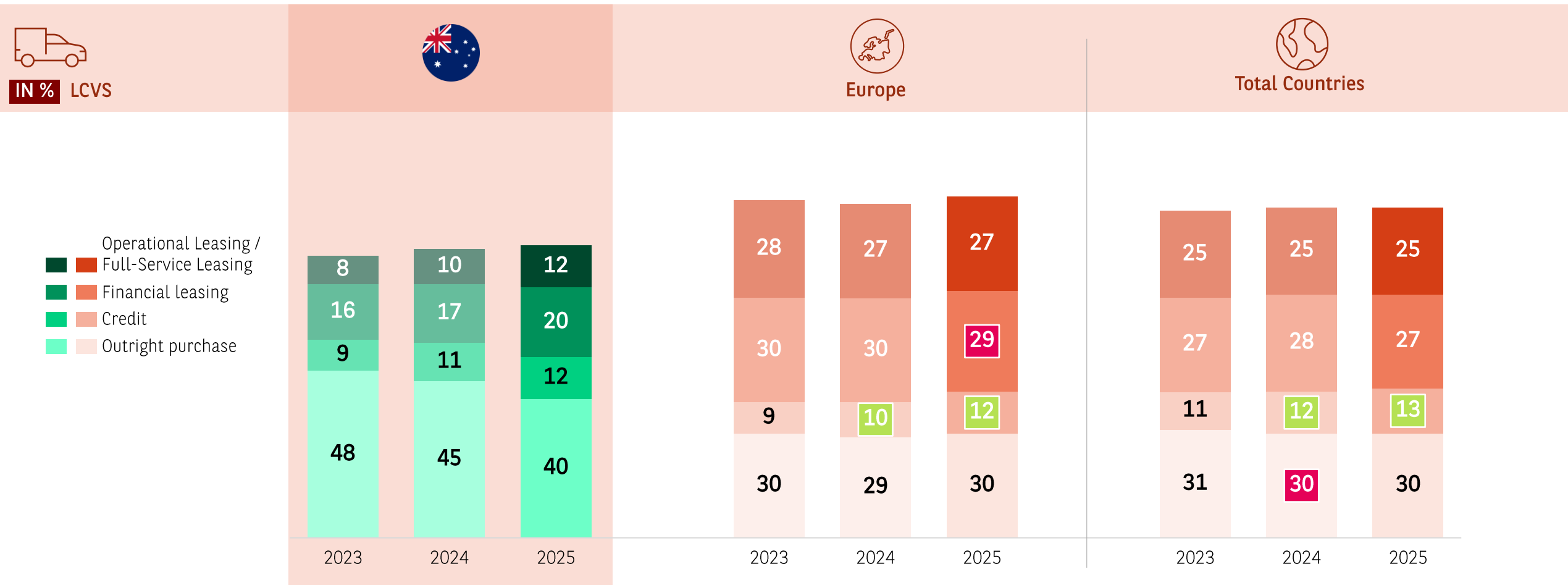


B3. And what is the main method used to finance your passenger cars today?
Basis: companies with passenger cars

MAIN LCV FINANCING METHOD

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 12% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their LCVs.



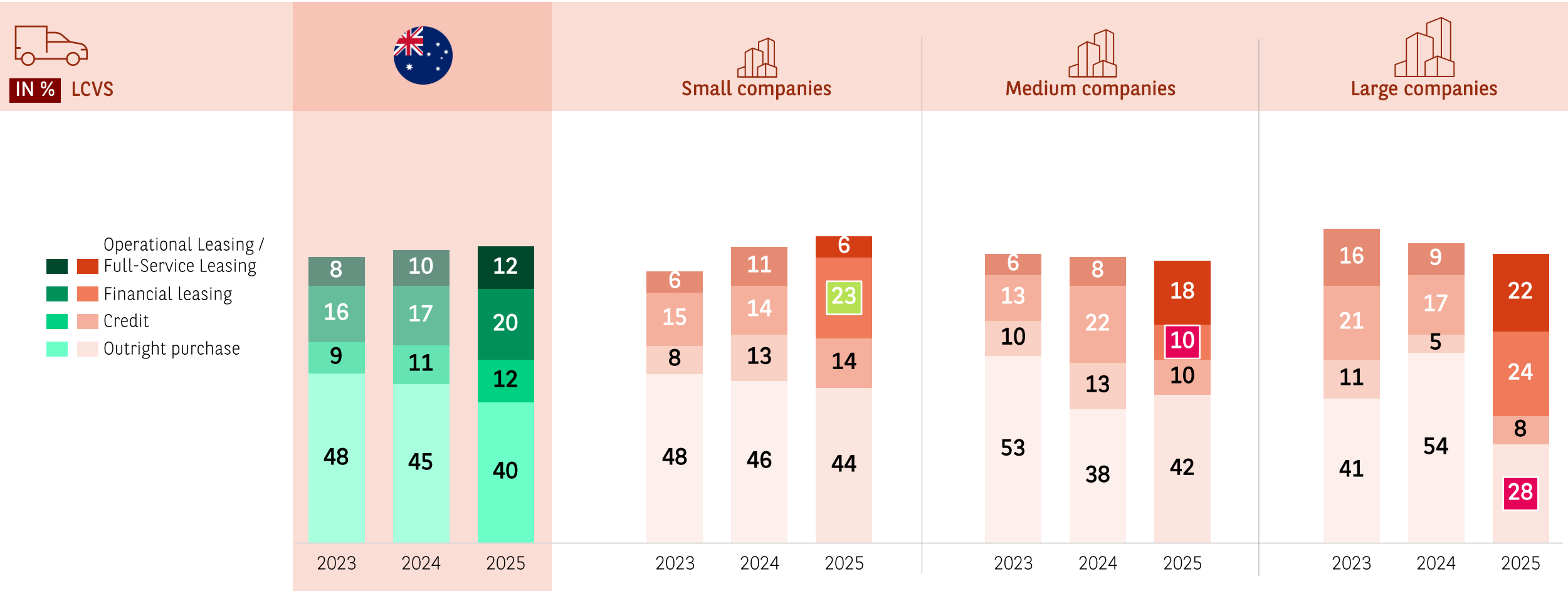
B4. And what is the main method used to finance your light commercial vehicles or vans today?
Basis: companies with LCVs

X% Significantly higher / lower vs. previous wave

MAIN LCV FINANCING METHOD

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 12% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their LCVs.



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

X% Significantly higher / lower vs. previous wave

MAIN LCV FINANCING METHOD

HOW TO READ THE RESULTS ?

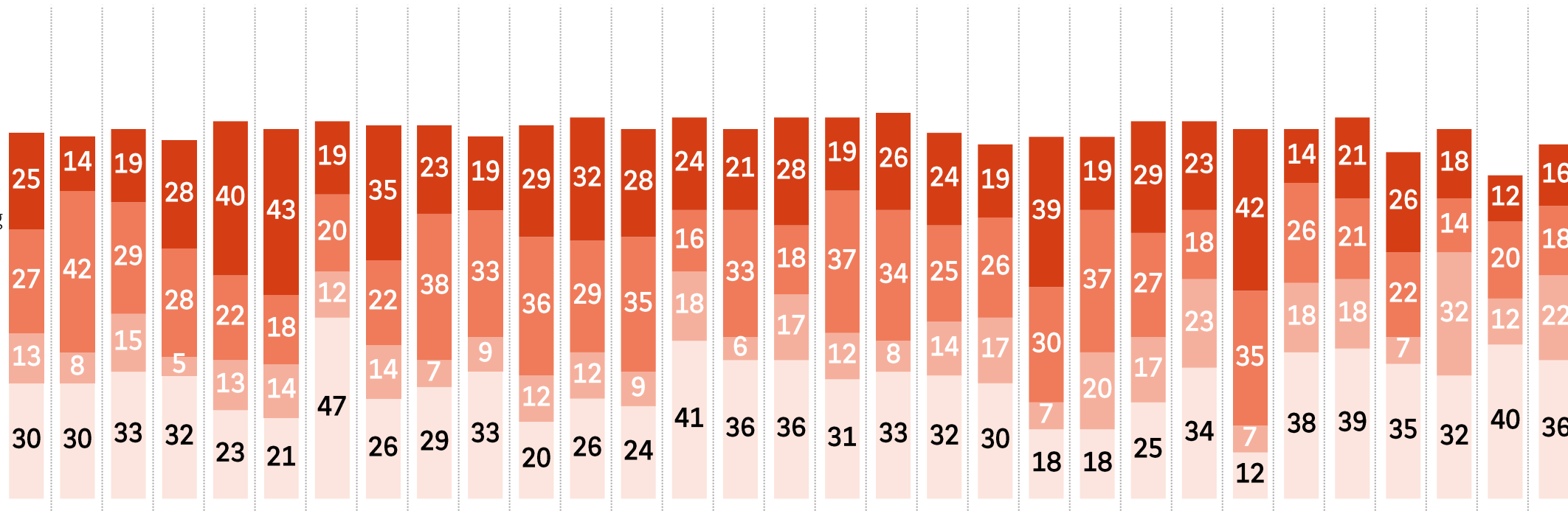
Among the Australian companies surveyed in 2025, 12% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their LCVs.



IN % LCVS



Operational Leasing / Full-Service Leasing
 Financial leasing
 Credit
 Outright purchase

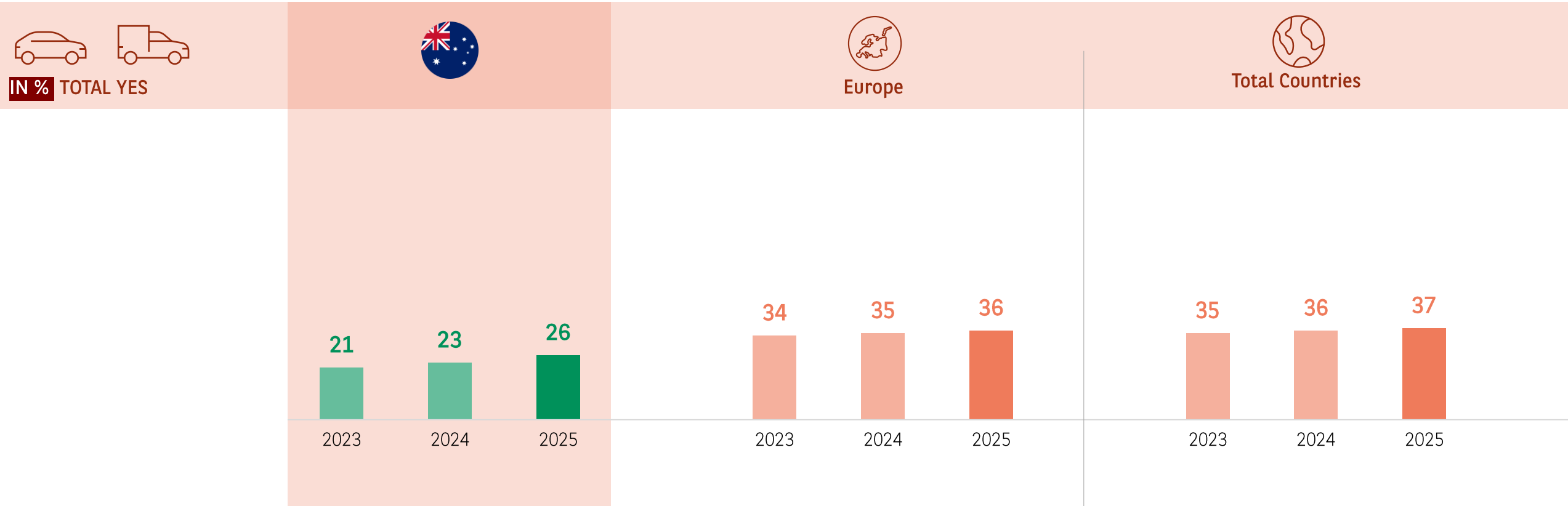


B4. And what is the main method used to finance your light commercial vehicles or vans today?
 Basis: companies with LCVs

INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATIONAL LEASING

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 26% 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.



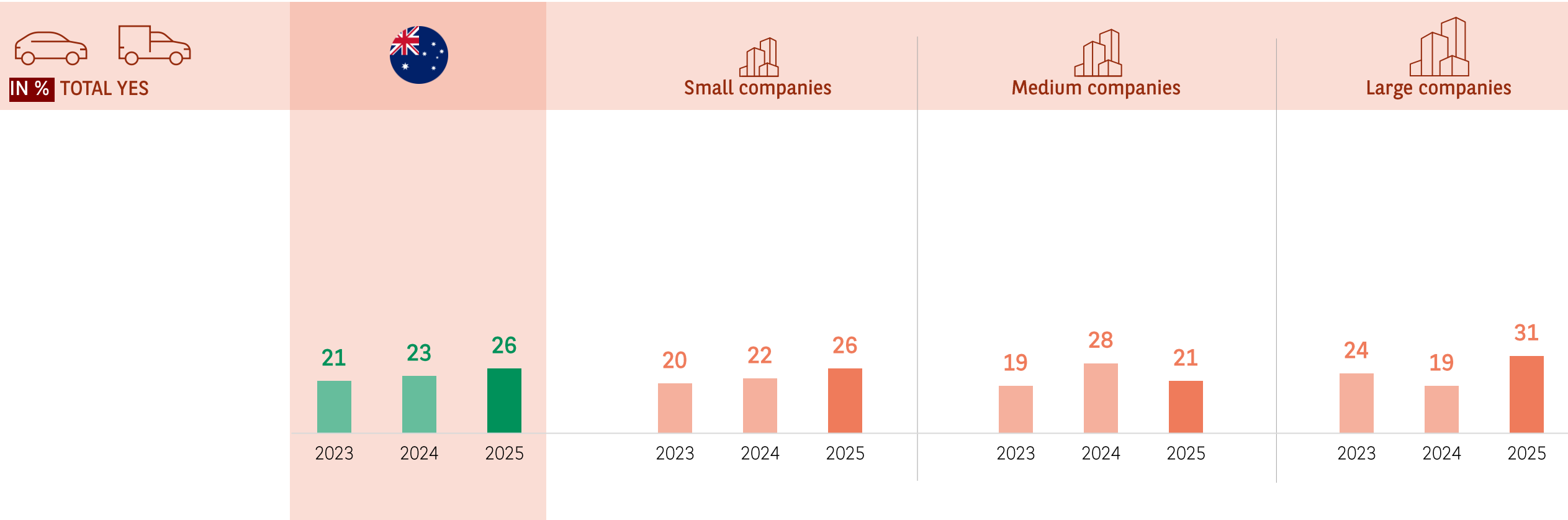
B8bis. In the next three years do you intend to either introduce or increase the use of Operational Leasing / Full-Service Leasing to finance your corporate fleet?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATIONAL LEASING

HOW TO READ THE RESULTS ?

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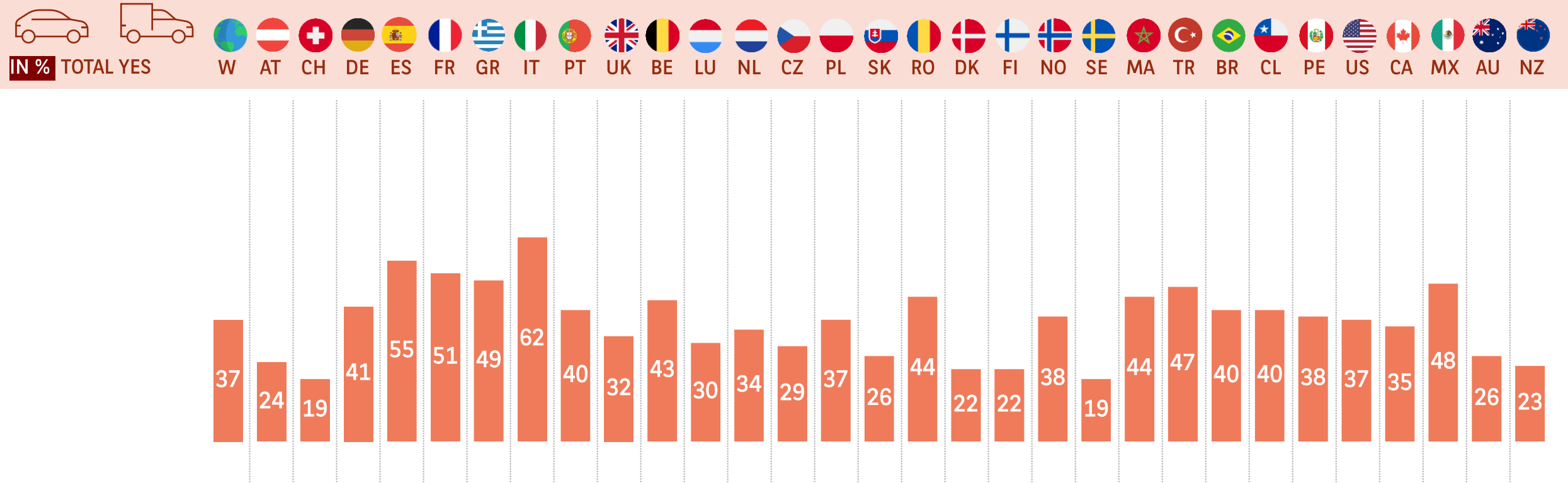
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X% Significantly higher / lower vs. previous wave

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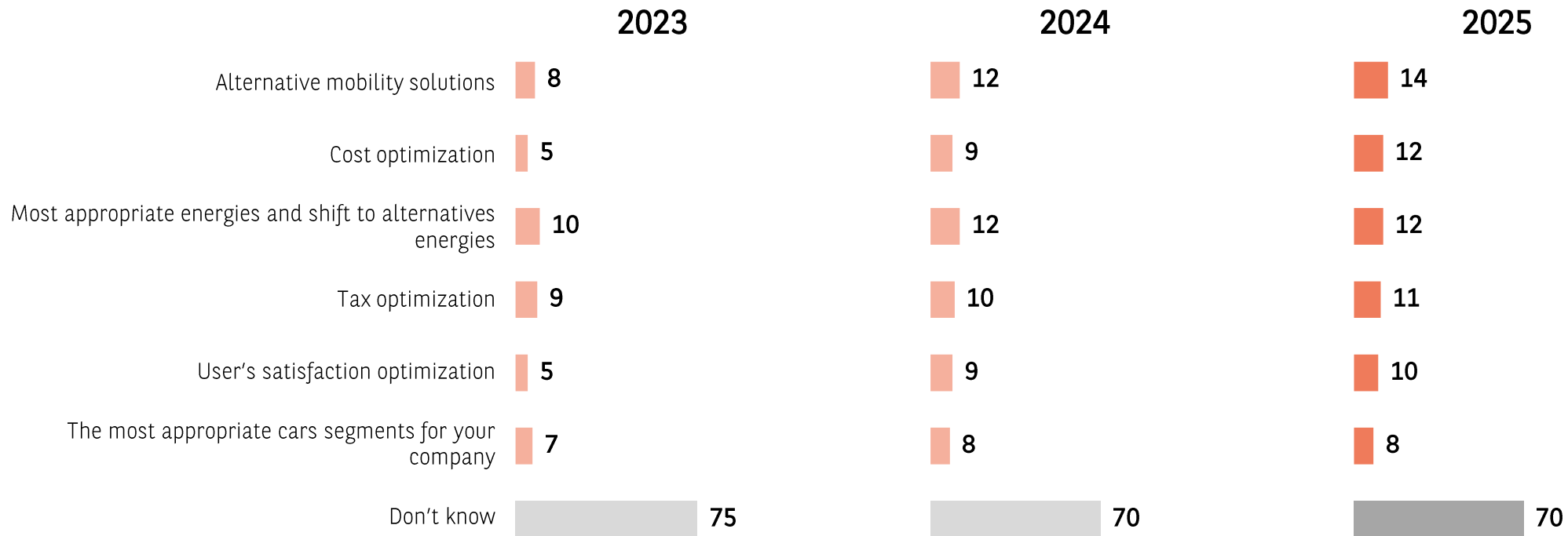
INTEREST IN ADVICE FROM EXTERNAL SUPPLIER

HOW TO READ THE RESULTS ?

In 2025, 14% of the Australian companies surveyed would be interested in receiving advice from an external supplier on Alternative mobility solutions.

Local question

IN %



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

X% Significantly higher / lower vs. previous wave

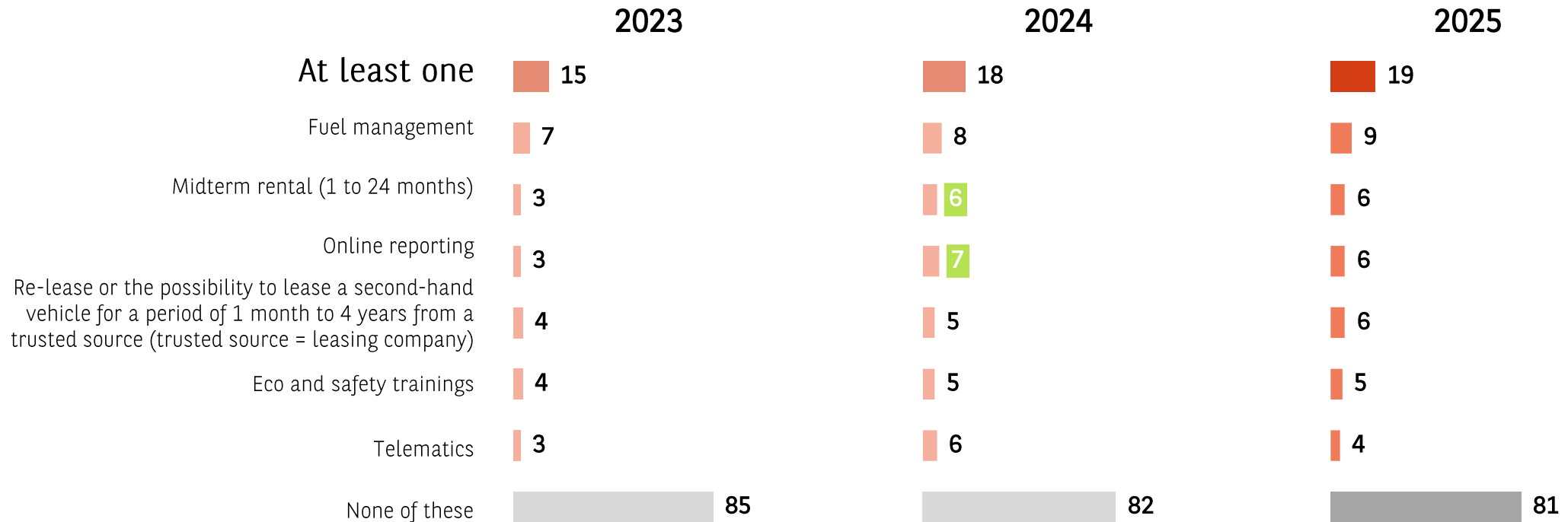
INTEREST IN ADDITIONAL SERVICES

HOW TO READ THE RESULTS ?

In 2025, 19% of the Australian companies surveyed would be interested in at least one additional service or product concerning their fleet management. 9% of the companies would be interested in Fuel management.

Local question

IN %



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

X% Significantly higher / lower vs. previous wave

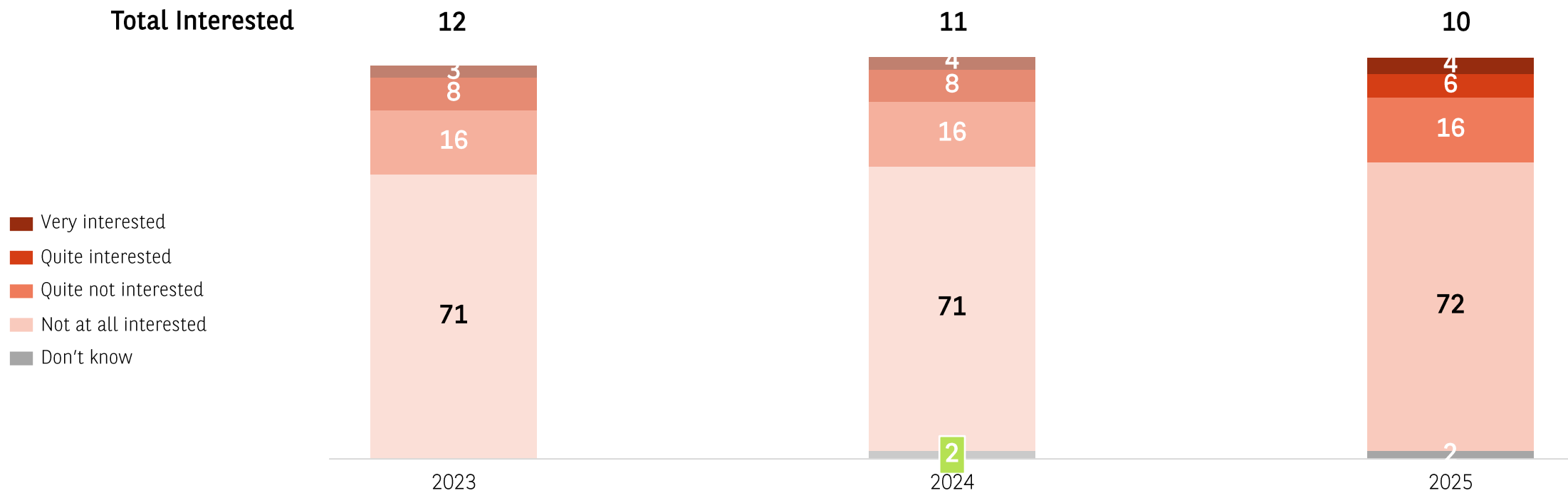
INTEREST IN CONSULTING EXPERTISE FOR COST OPTIMIZATION

HOW TO READ THE RESULTS ?

In 2025, 10% of the Australian companies surveyed 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 growing electrification of Australian passenger car fleets

In 2025, **55%** of Australian companies surveyed have implemented at least one electrified technology (HEV, PHEV or 100% BEV) for passenger cars. This trend is in progress (43% in 2024) and is aligned with the European average (56%).

Usage is consistent across company sizes.

Hybrid vehicles (HEVs) show the best potential for Australian passenger cars fleets' transition

34% of Australian companies surveyed are using HEVs in their fleets, above the European average (27%), but growth potential is quite low (4%). Then, comes PHEV (18% penetration to date, constantly growing since 2023) and BEV (13%), behind European averages (28% and 22% respectively).

Lower environmental impact and fuel expenses reductions are the 2 main reasons for adopting alternative energy technologies within passenger car fleets

53% of Australian companies surveyed report a decrease of their environmental impact and **46%** fuel expenses reduction as their main drivers for their transition to electrified passenger cars. The trend is above other European markets (respectively 36% and 32%).

Improving company image (38%), compliance with CSR (37%) and lower TCOs (36%) are the following reasons.

The shift for electrified LCVs fleets remains complicated

Adoption and consideration of battery electric vehicles (BEVs) within LCV fleets has remained quite stable over the past two years (**16%** in 2025), while there is a downward trend in consideration for the European market.

Hydrogen Fuel Cell adoption and consideration remain low in Australia as well as in Europe.

Overall, the main obstacle to wider adoption of electric vehicle fleets is insufficient charging infrastructure

57% to **58%** of Australian companies surveyed mention charging points limitations as a constraint for using electric LCVs and passenger cars.

To address this issue, Australian companies develop or consider developing charging strategies by choosing from a variety of solutions

86% have or plan to implement a charging policy. Regarding size distribution, large companies tend to be more interested than small ones (98% vs 80%).

Public charging is part of the strategy for **51%** of companies, of which 47% support energy costs (24% via expense claim and 23% via energy cards), while 53% do not reimburse them.

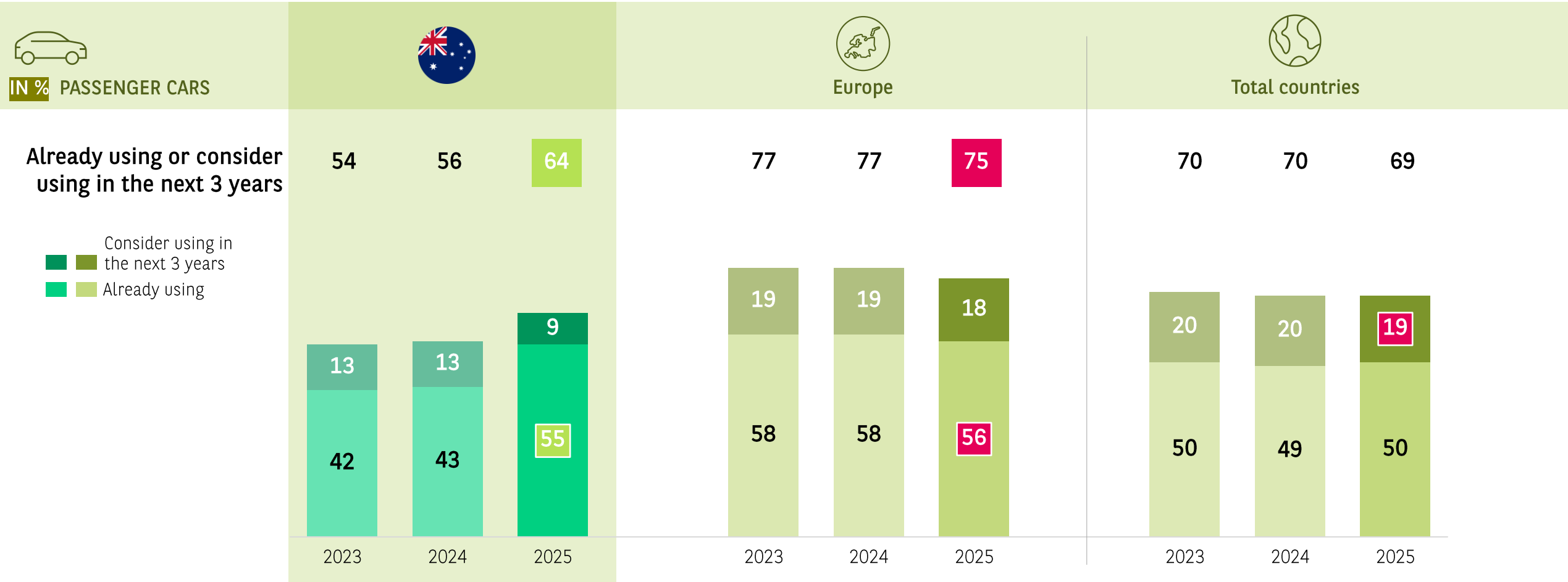
Company premises charging is a current or future strategy for **49%** of companies, with among them 59% installing or considering charging points, and 39% having implemented or planning to implement support for charging costs on their premises.

Home charging is a strategy for **48%** of companies, of which 61% support or plan to support home charger installation, with 100% covering at least part of the box and installation costs.

ALTERNATIVE ENERGY TECHNOLOGIES USAGE AT LEAST ONE TECHNOLOGY AMONG BEV, PHEV, HEV

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 64% of the companies with passenger cars are already using at least one alternative energy technology among BEV, PHEV, HEV or are considering doing so in the next 3 years.



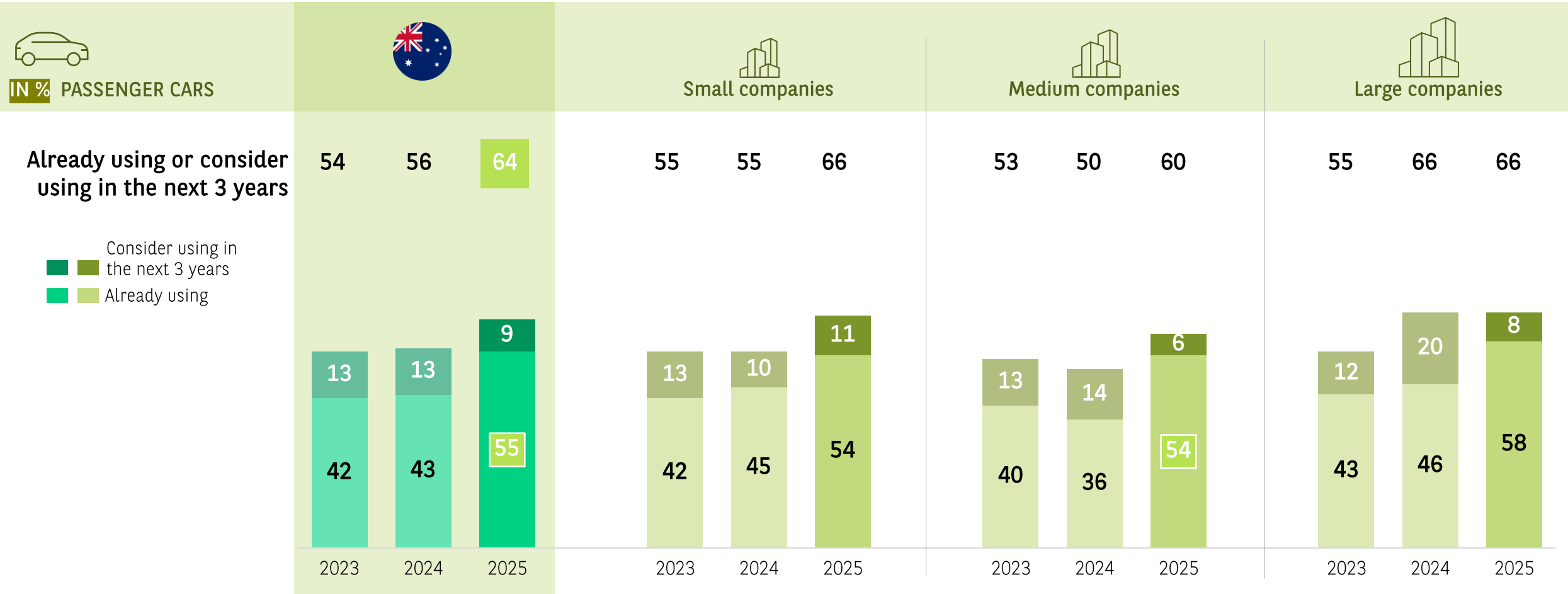
E28. Amongst the following alternative energy technologies, which ones do you currently use...? / E28bis. Amongst the following alternative energy technologies, which ones are you considering using...? Basis: companies with passenger cars

X% Significantly higher / lower vs. previous wave

ALTERNATIVE ENERGY TECHNOLOGIES USAGE AT LEAST ONE TECHNOLOGY AMONG BEV, PHEV, HEV

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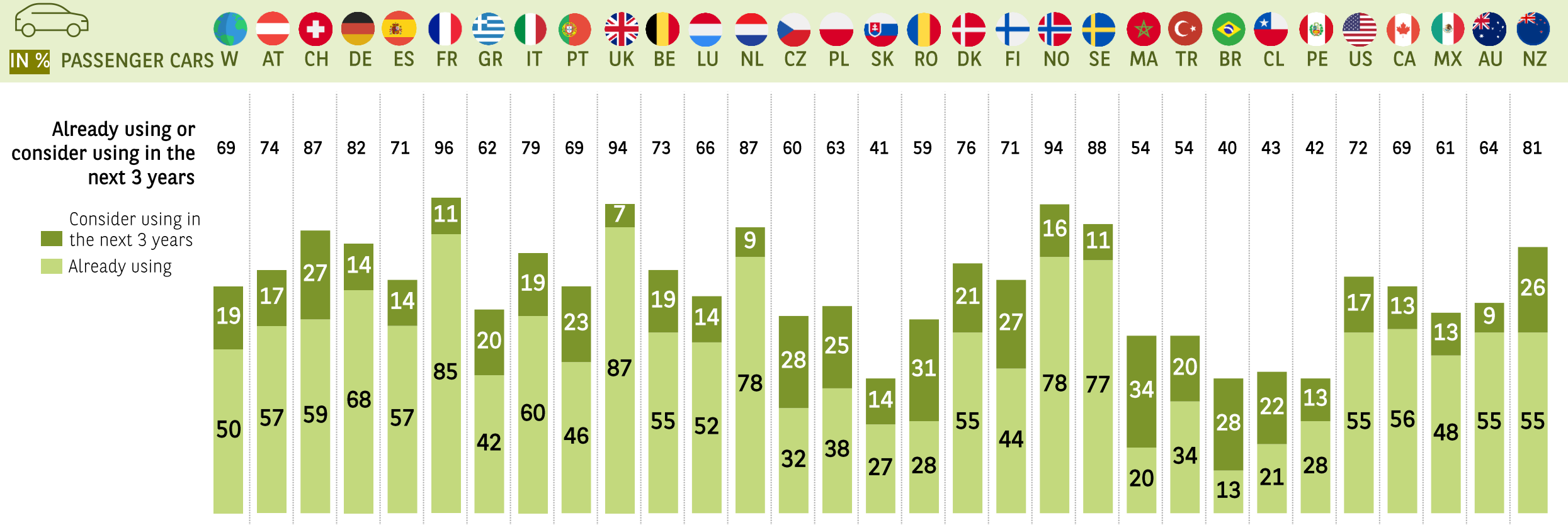
E28. Amongst the following alternative energy technologies, which ones do you currently use...? / E28bis. Amongst the following alternative energy technologies, which ones are you considering using...? Basis: companies with passenger cars

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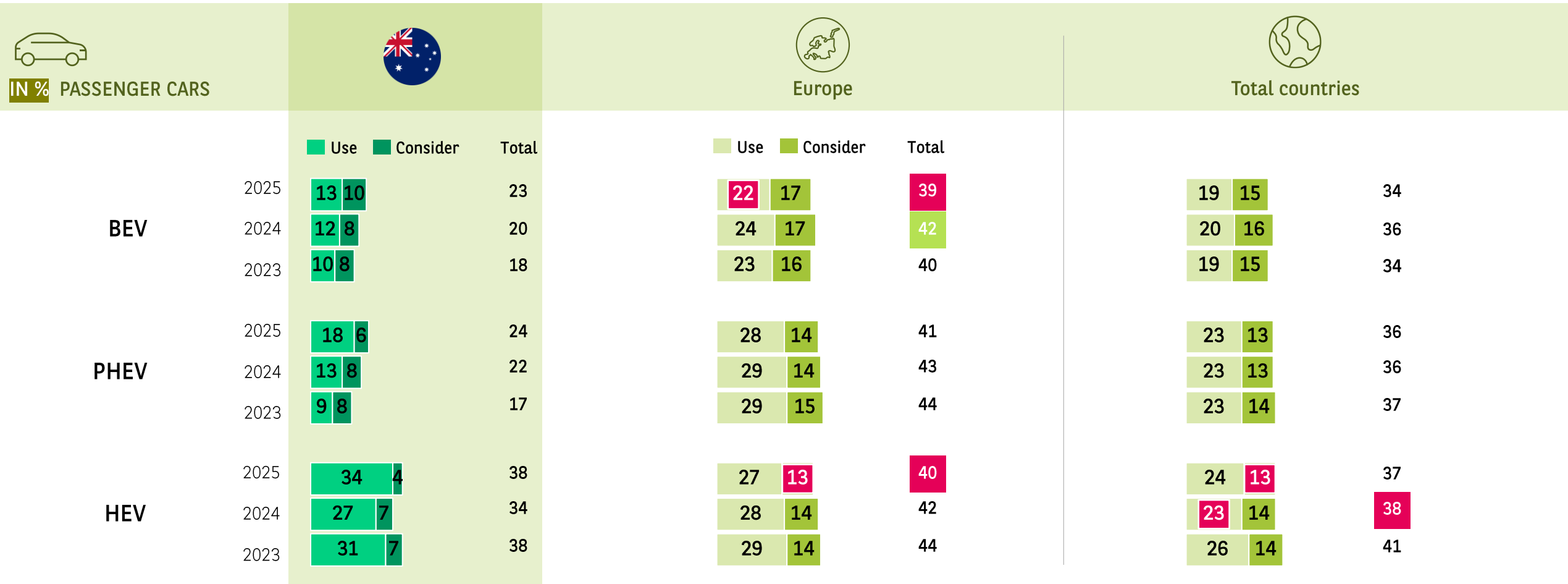
E28. Amongst the following alternative energy technologies, which ones do you currently use...? /
E28bis. Amongst the following alternative energy technologies, which ones are you considering using...?
Basis: companies with passenger cars

ALTERNATIVE ENERGY TECHNOLOGIES USAGE

DETAIL PER TECHNOLOGY

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 23% of the companies with passenger cars are already using BEV or are considering using it in the next three years.



E28. Amongst the following alternative energy technologies, which ones do you currently use...?

E28bis. Amongst the following alternative energy technologies, which ones are you considering using...?

Basis: companies with passenger cars

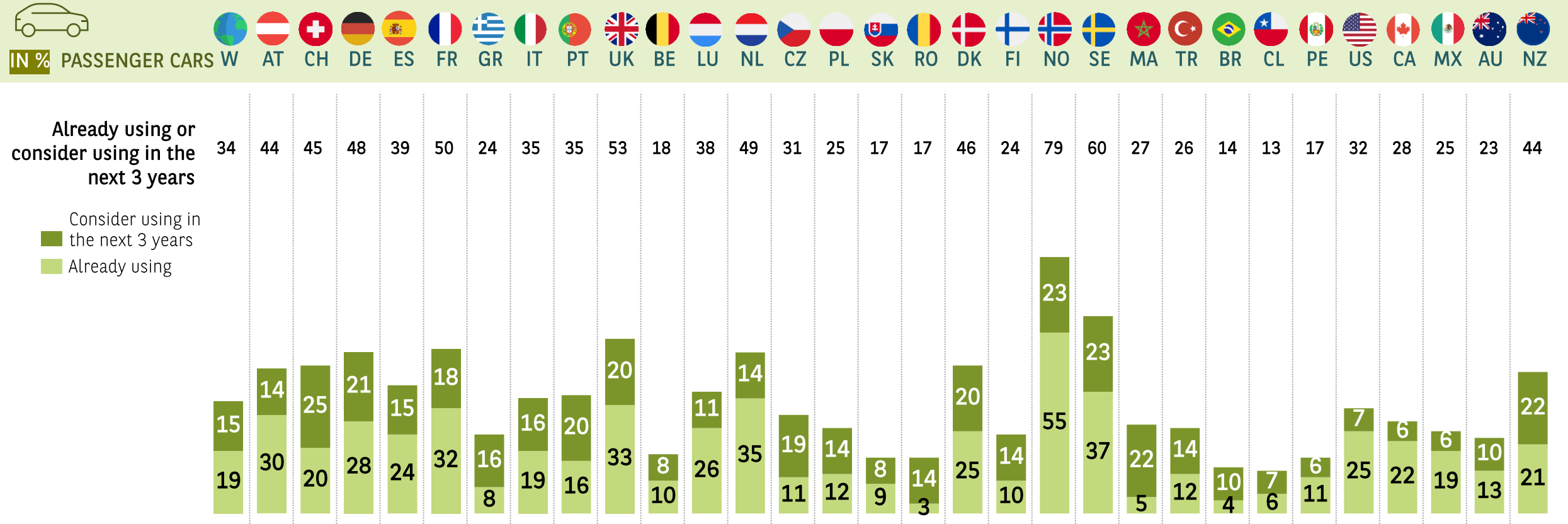
X% Significantly higher / lower vs. previous wave

ALTERNATIVE ENERGY TECHNOLOGIES USAGE

FOCUS ON BEV

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 23% of the companies with passenger cars are already using BEV or are considering using it in the next three years.



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E28bis. Amongst the following alternative energy technologies, which ones are you considering using...?

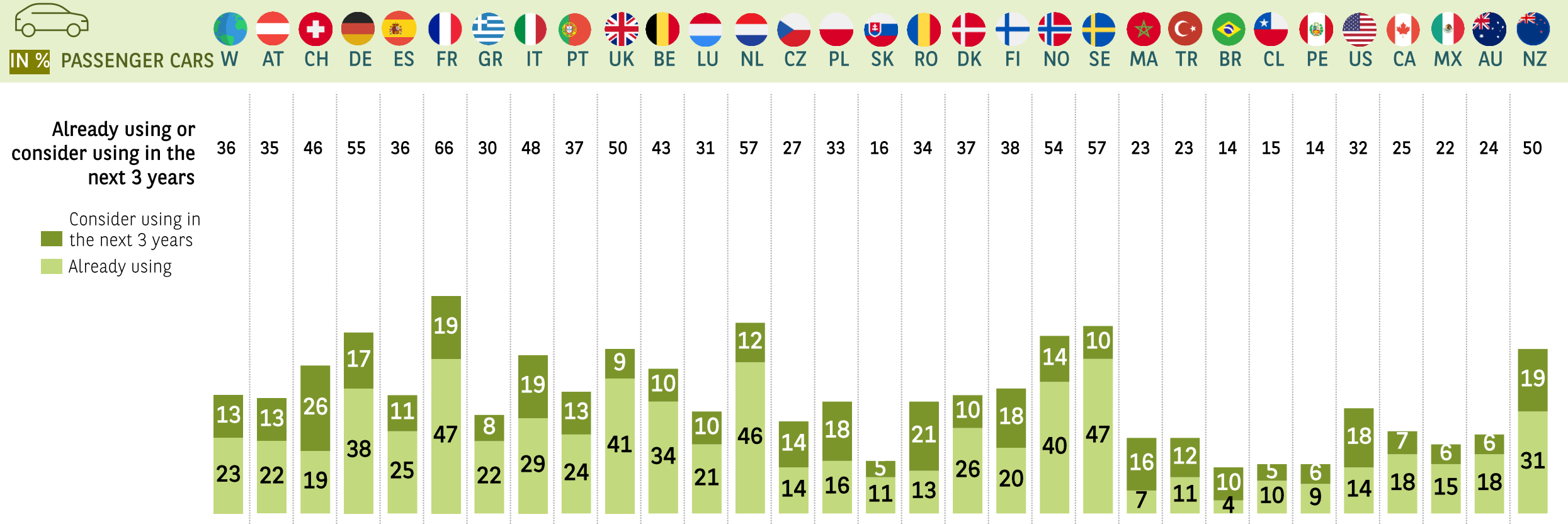
Basis: companies with passenger cars

ALTERNATIVE ENERGY TECHNOLOGIES USAGE

FOCUS ON PHEV

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 24% of the companies with passenger cars are already using PHEV or are considering using it in the next three years.



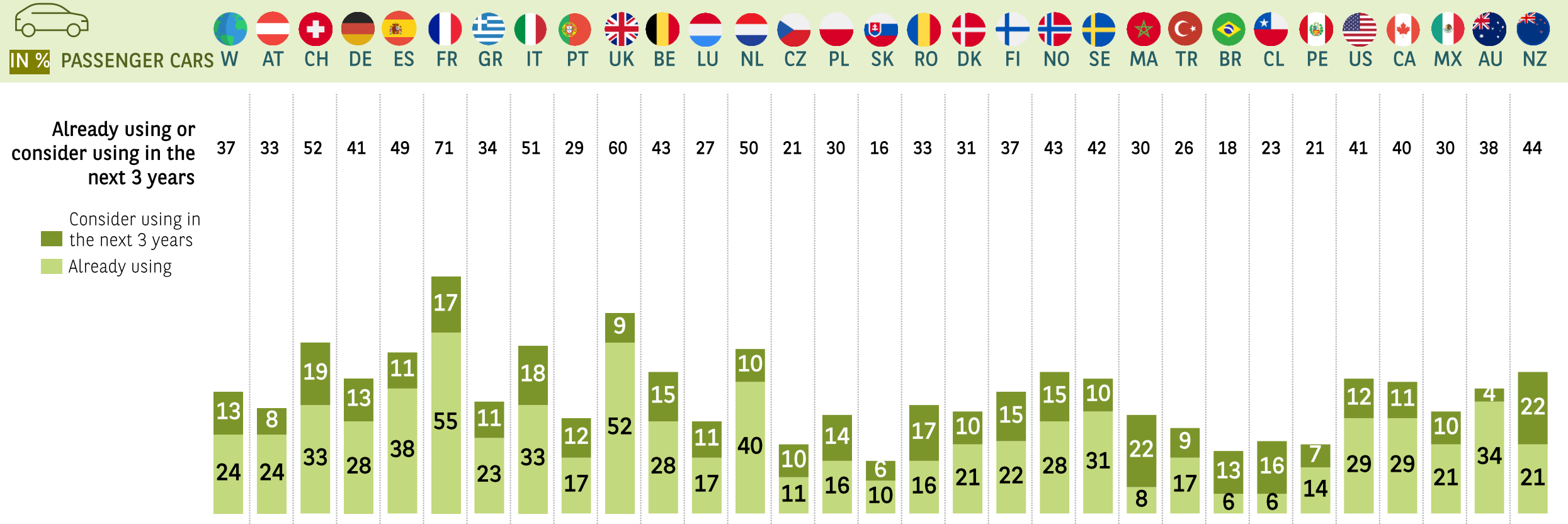
E28. Amongst the following alternative energy technologies, which ones do you currently use...?
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 Basis: companies with passenger cars

ALTERNATIVE ENERGY TECHNOLOGIES USAGE

FOCUS ON HEV

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 38% of the companies with passenger cars are already using HEV or are considering using it in the next three years.

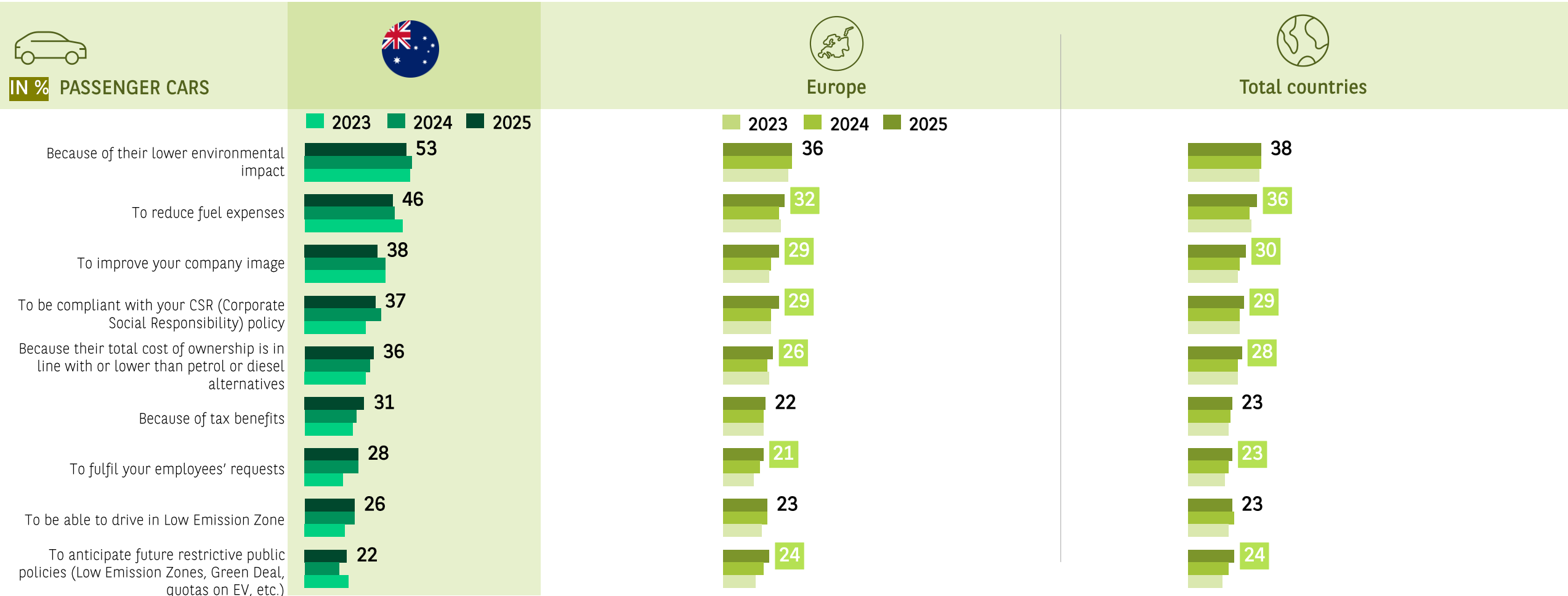


E28. Amongst the following alternative energy technologies, which ones do you currently use...?
 E28bis. Amongst the following alternative energy technologies, which ones are you considering using...?
 Basis: companies with passenger cars

REASONS FOR IMPLEMENTING ALTERNATIVE ENERGY TECHNOLOGIES FOR PASSENGER CARS

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 53% of the companies with passenger cars are already using alternative energy technologies or are considering it Because of their lower environmental impact.



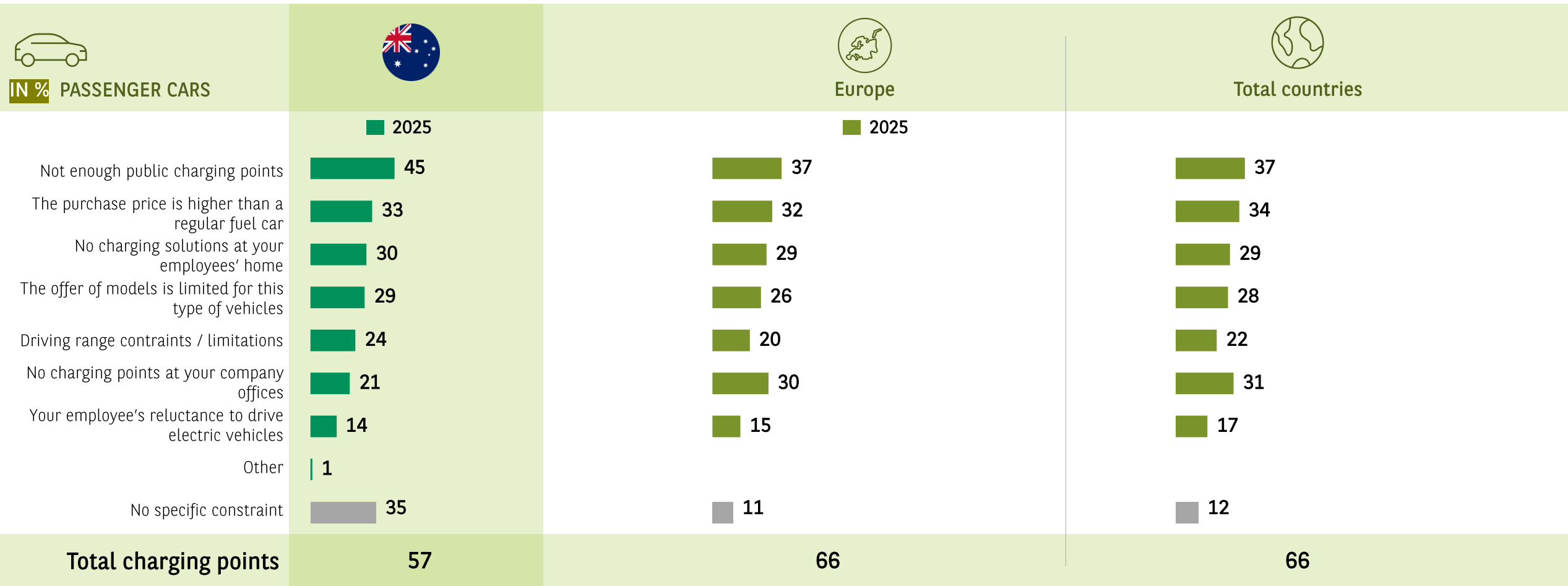
E28A. Why have you already implemented or why do you consider implementing these energy technologies?
Basis: companies that are already using or considering using alternative energy technologies for passenger cars

X% Significantly higher / lower vs. previous wave

CONSTRAINTS FOR USING ELECTRIC PASSENGER CARS

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 45% of the companies with passenger cars declare that the main constraint for using electric passenger cars is: Not enough public charging points. And 57% of the companies mention at least one reason related to charging points.

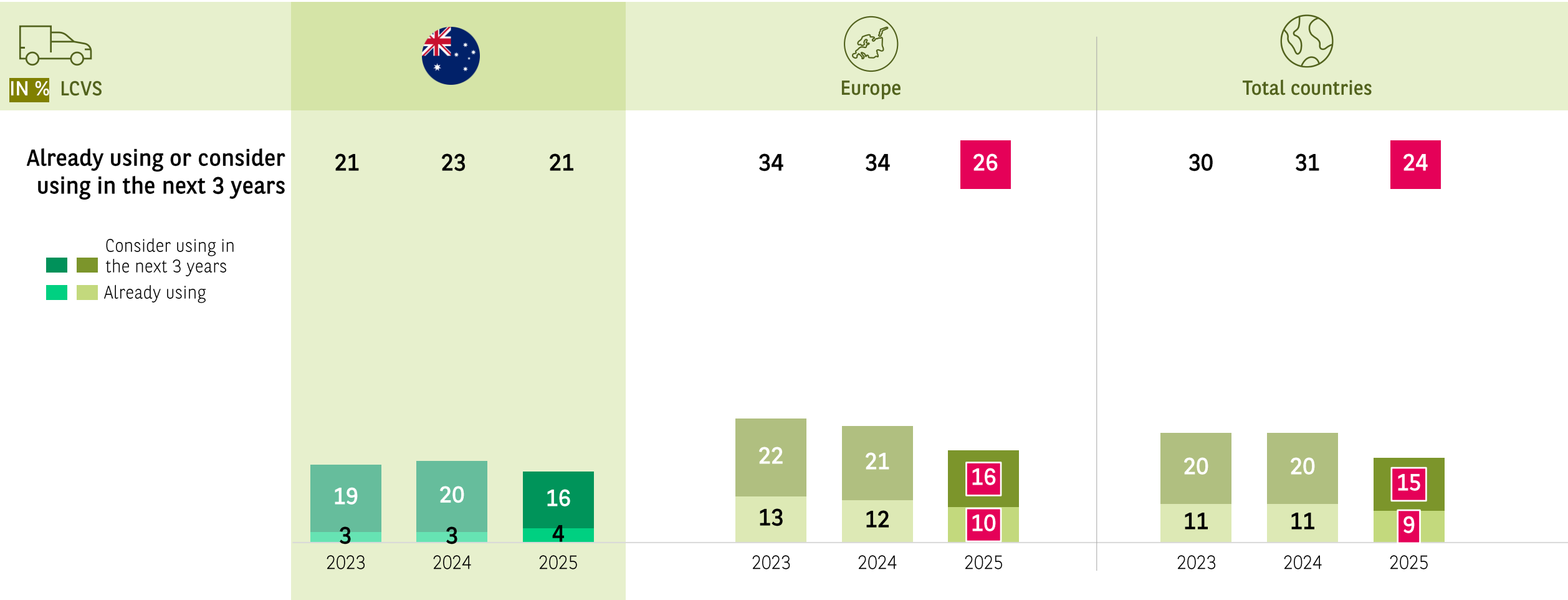


E28B_1. What are the constraints of using electric passenger cars (Battery Electric Vehicles)?
Basis: companies with passenger cars and aware of EV technology

ALTERNATIVE ENERGY TECHNOLOGIES USAGE AT LEAST ONE TECHNOLOGY AMONG BEV, HYDROGEN FUEL CELL

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 21% of the companies with LCVs are already using at least one alternative energy technology among BEV and Hydrogen fuel cell or are considering doing so in the next 3 years.



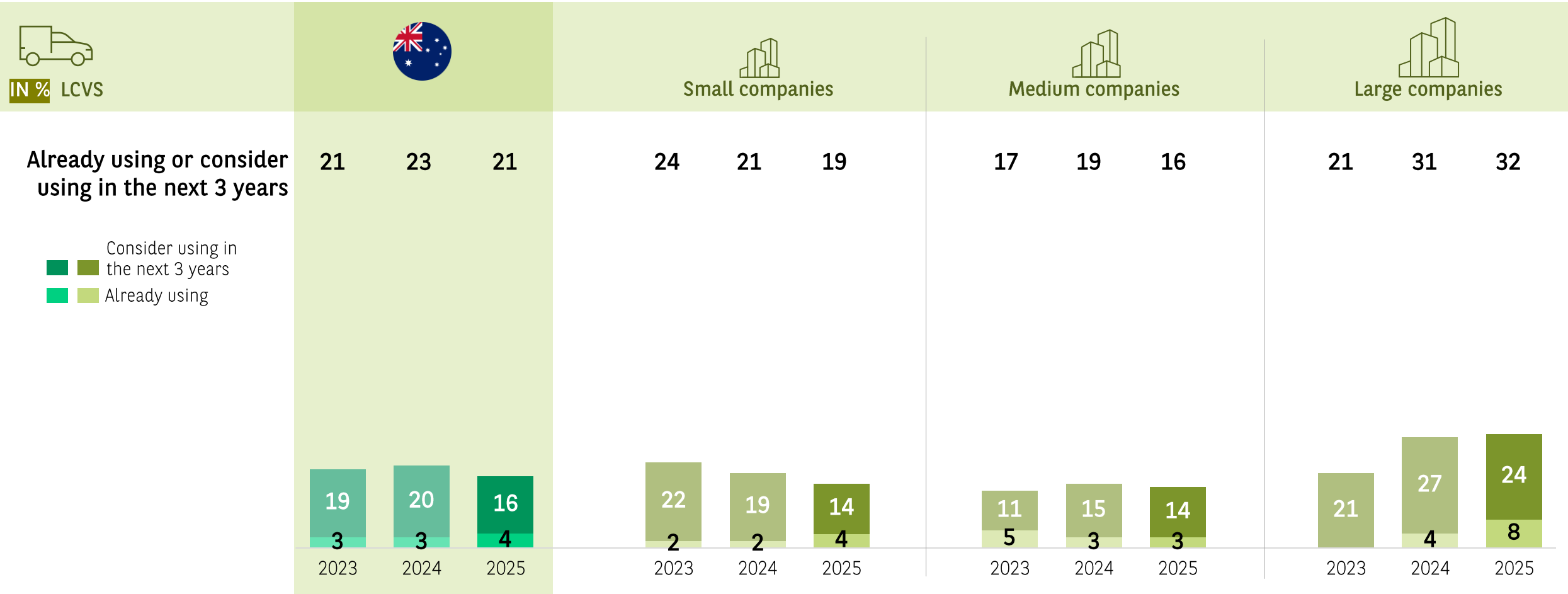
E28. Amongst the following alternative energy technologies, which ones do you currently use...?
E28bis. Amongst the following alternative energy technologies, which ones are you considering using...?
Basis: companies with LCVs

X% Significantly higher / lower vs. previous wave

ALTERNATIVE ENERGY TECHNOLOGIES USAGE AT LEAST ONE TECHNOLOGY AMONG BEV, HYDROGEN FUEL CELL

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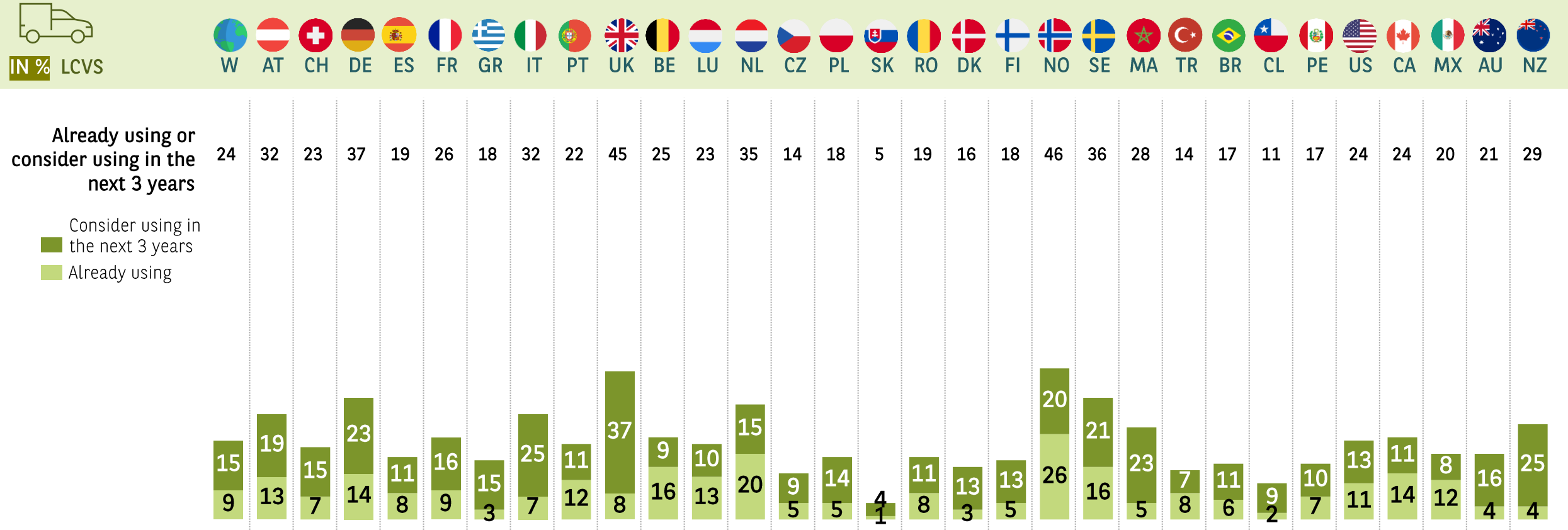
E28. Amongst the following alternative energy technologies, which ones do you currently use...?
E28bis. Amongst the following alternative energy technologies, which ones are you considering using...?
Basis: companies with LCVs

X% Significantly higher / lower vs. previous wave

ALTERNATIVE ENERGY TECHNOLOGIES USAGE AT LEAST ONE TECHNOLOGY AMONG BEV, HYDROGEN FUEL CELL

HOW TO READ THE RESULTS ?

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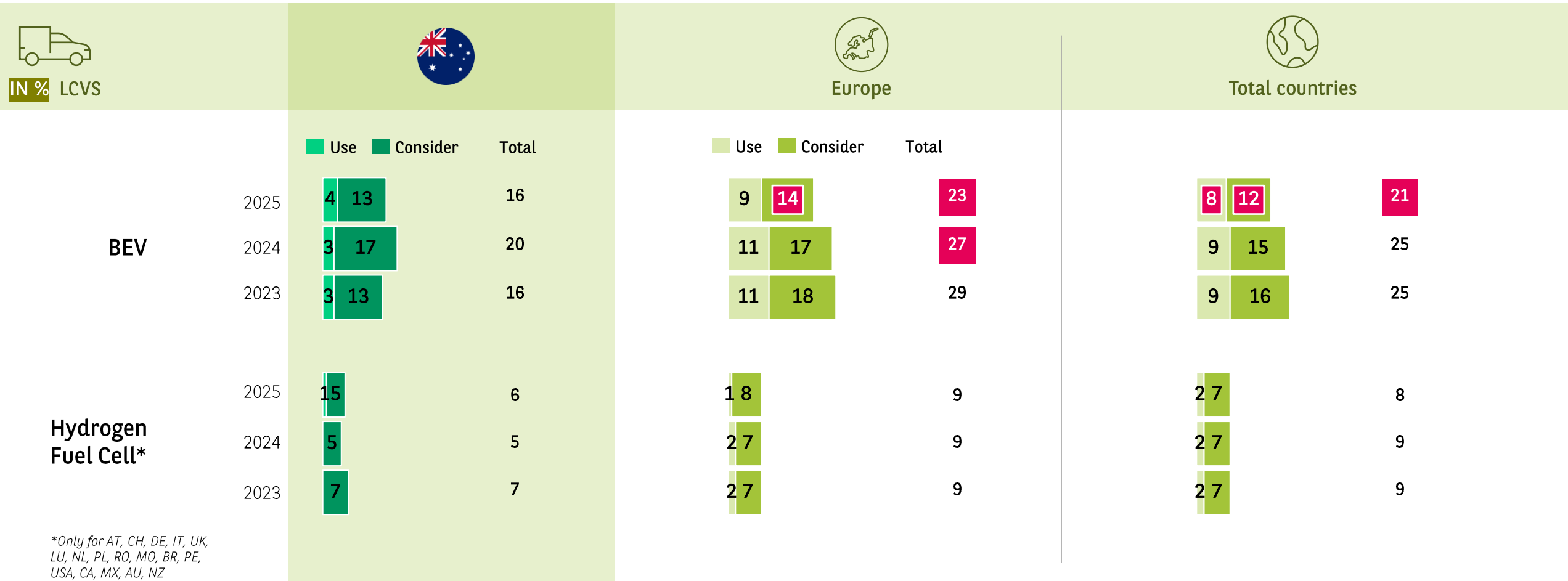
E28. Amongst the following alternative energy technologies, which ones do you currently use...?
E28bis. Amongst the following alternative energy technologies, which ones are you considering using...?
Basis: companies with LCVs

ALTERNATIVE ENERGY TECHNOLOGIES USAGE

DETAIL PER TECHNOLOGY

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 16% of the companies with LCVs are already using or consider using BEV in the next three years.



*Only for AT, CH, DE, IT, UK, LU, NL, PL, RO, MO, BR, PE, USA, CA, MX, AU, NZ

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

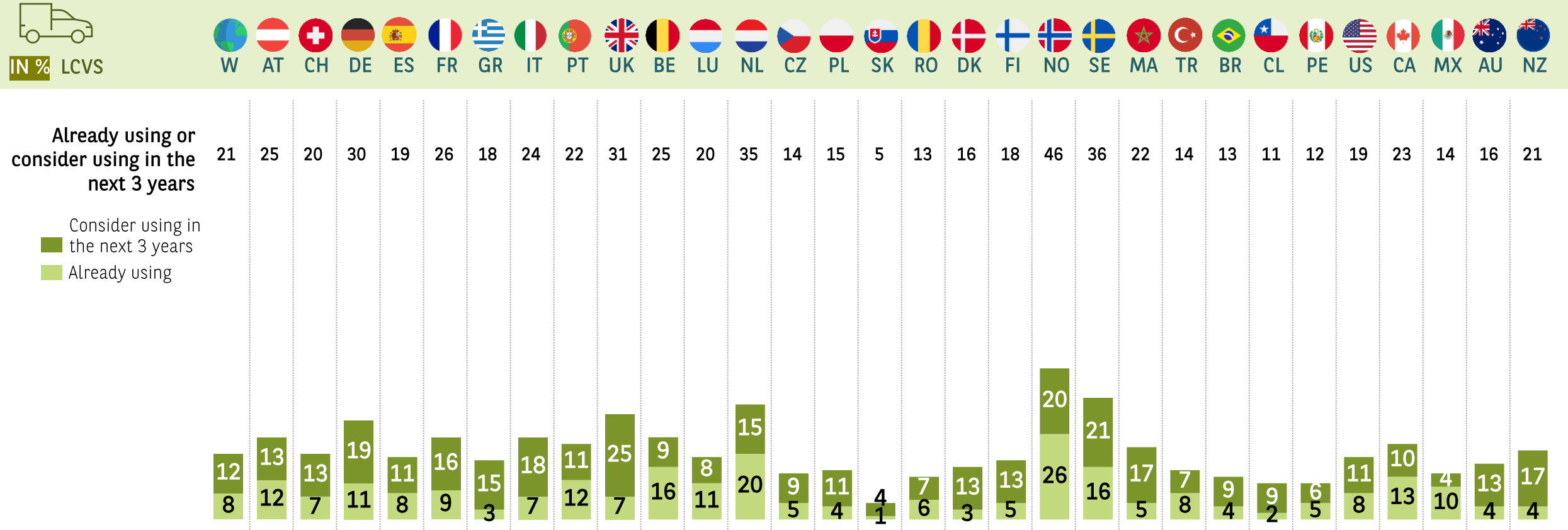
X% Significantly higher / lower vs. previous wave

ALTERNATIVE ENERGY TECHNOLOGIES USAGE

FOCUS ON BEV

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 16% of the companies with LCVs are already using BEV or are considering using it in the next three years.



E28. Amongst the following alternative energy technologies, which ones do you currently use...?

E28bis. Amongst the following alternative energy technologies, which ones are you considering using...?

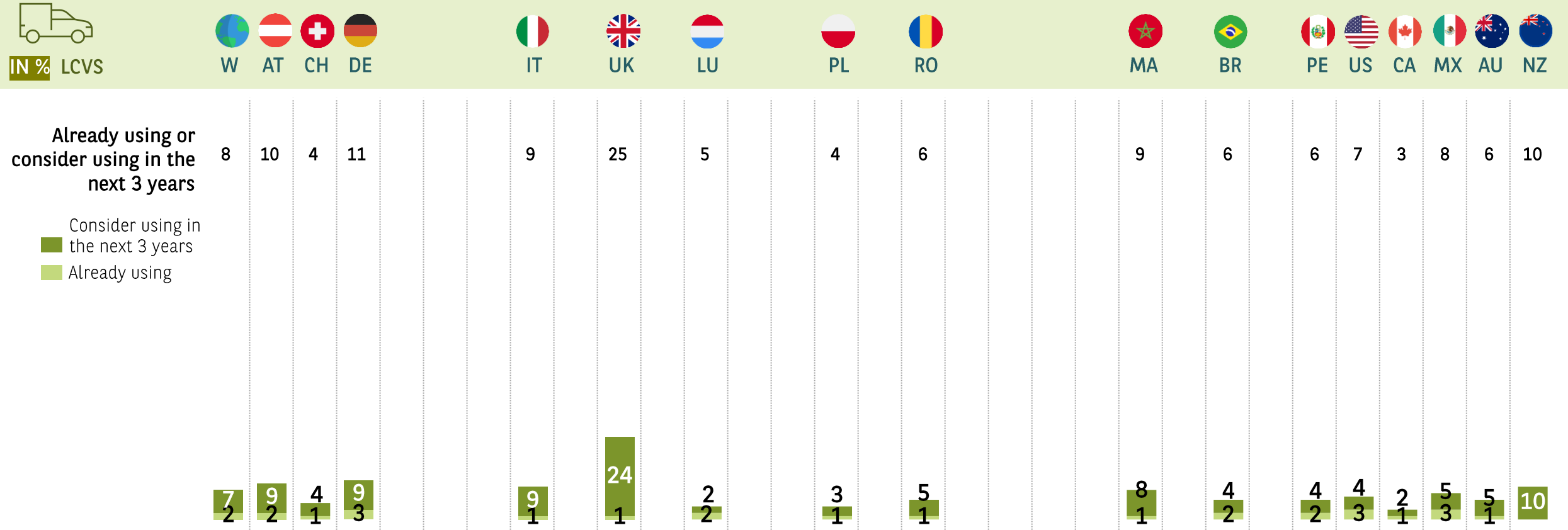
Basis: companies with LCVs

ALTERNATIVE ENERGY TECHNOLOGIES USAGE

FOCUS ON HYDROGEN FUEL CELL

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 6% of the companies with LCVs are already using Hydrogen fuel cell or are considering using it in the next three years.



E28. Amongst the following alternative energy technologies, which ones do you currently use...?

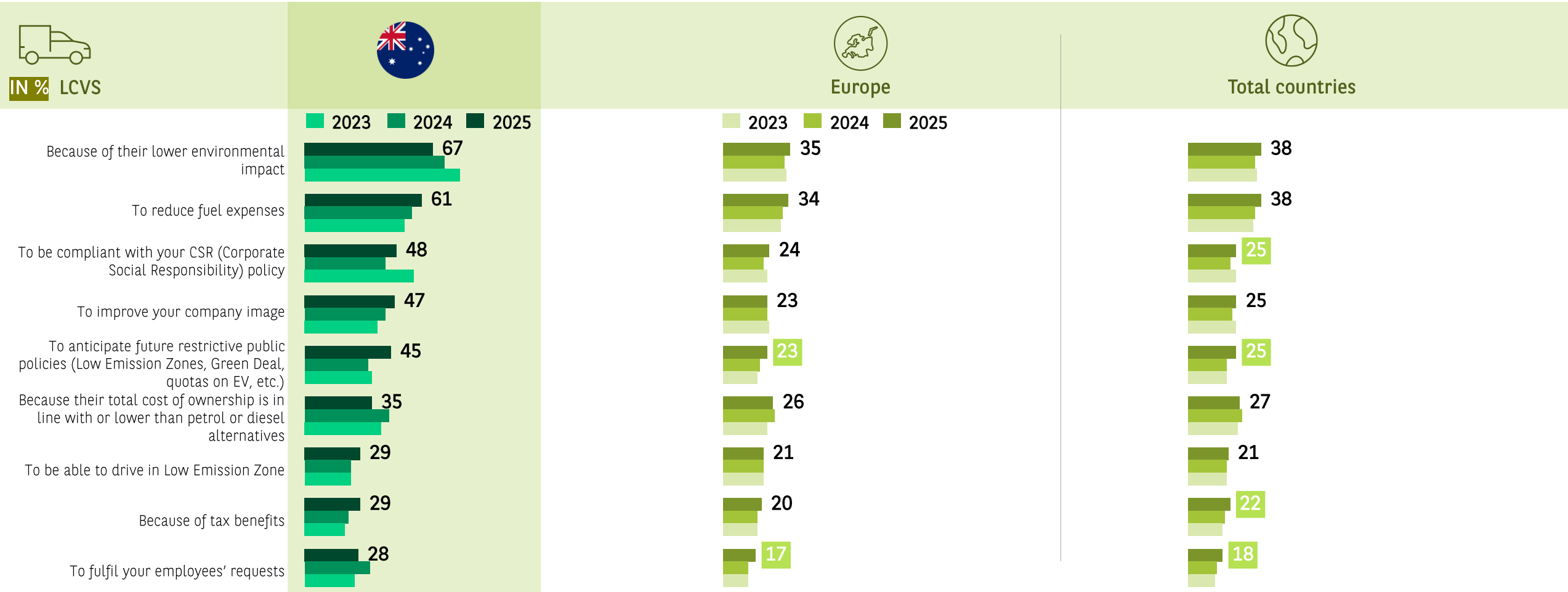
E28bis. Amongst the following alternative energy technologies, which ones are you considering using...?

Basis: companies with LCVs

REASONS FOR IMPLEMENTING ALTERNATIVE ENERGY TECHNOLOGIES FOR LCVs

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 67% of the companies with LCVs are already using alternative energy technologies or are considering it Because of their lower environmental impact.



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

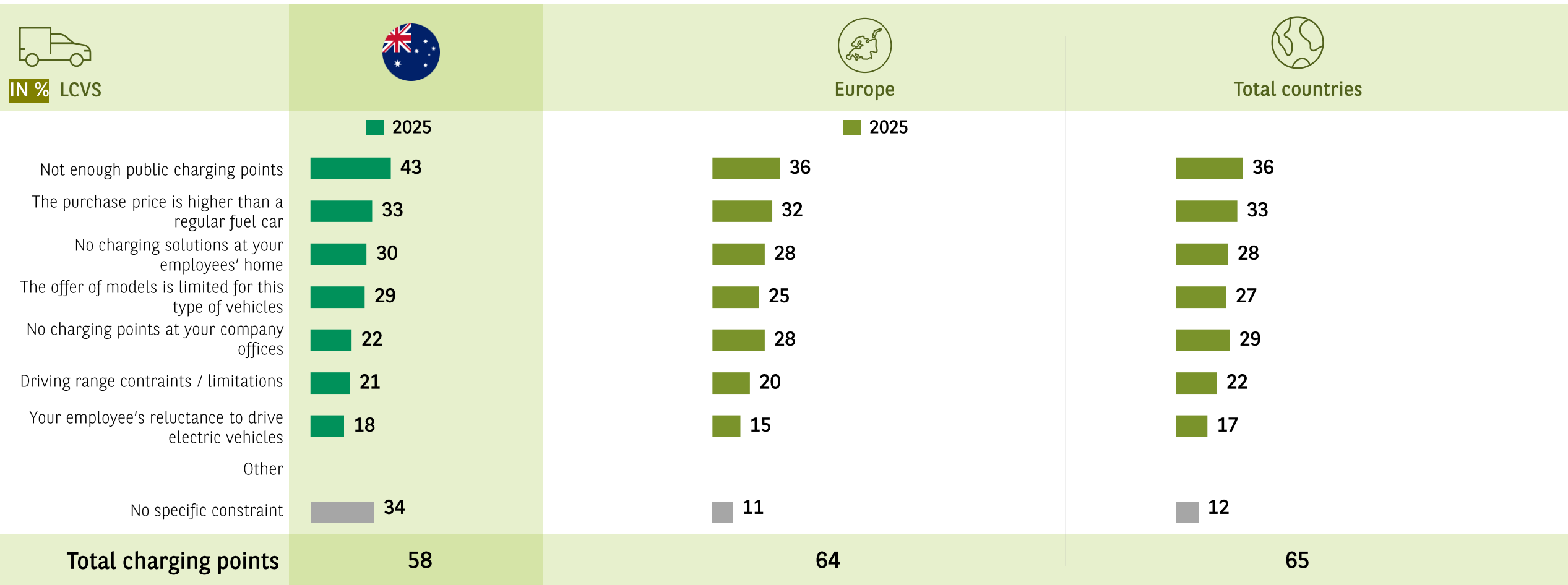
X% Significantly higher / lower vs. previous wave

CONSTRAINTS FOR USING ELECTRIC LIGHT COMMERCIAL VEHICLES

New question

HOW TO READ THE RESULTS ?


Among the Australian companies surveyed in 2025, 43% of the companies with LCVs declare that the main constraint for using electric LCVs is: Not enough public charging points. And 58% of the companies mention at least one reason related to charging points.



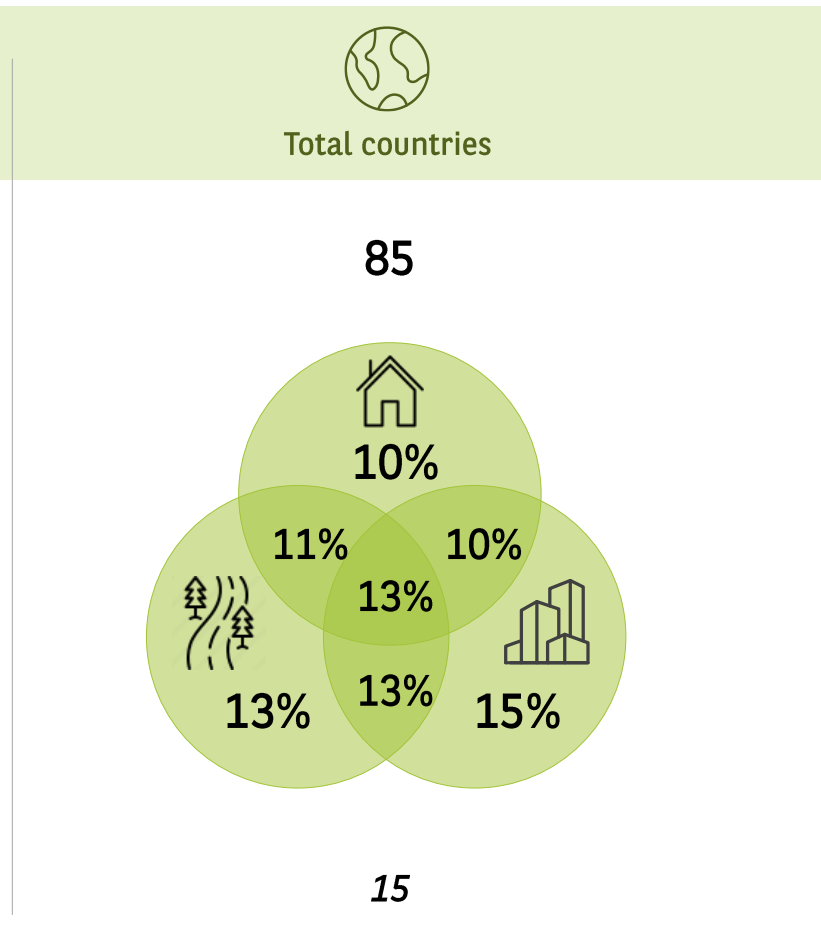
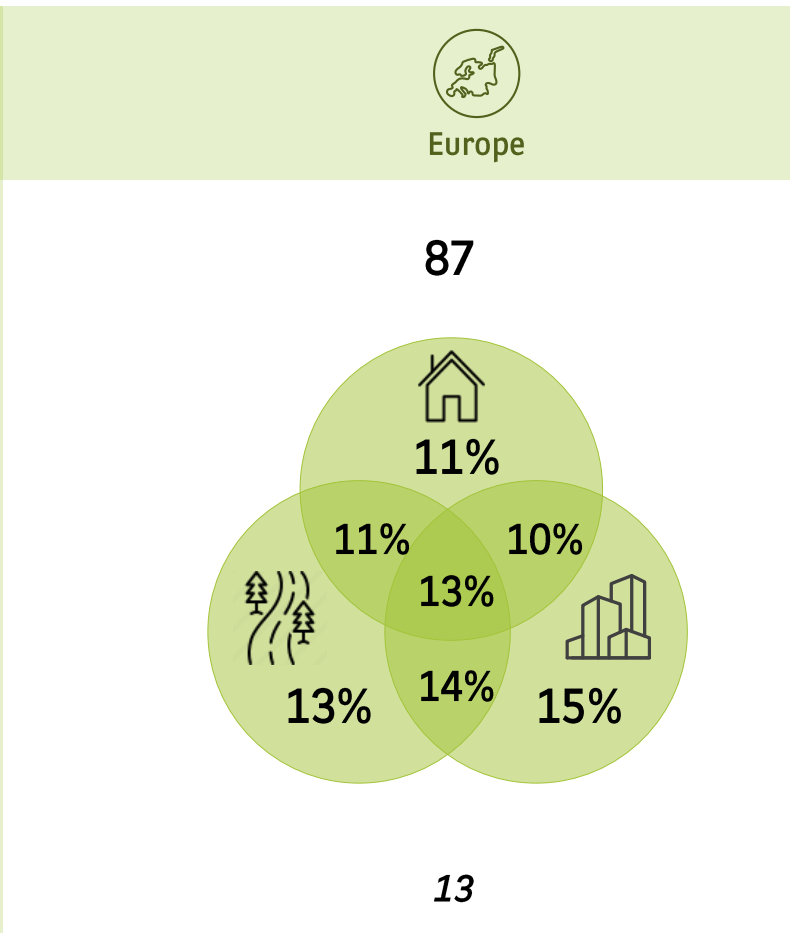
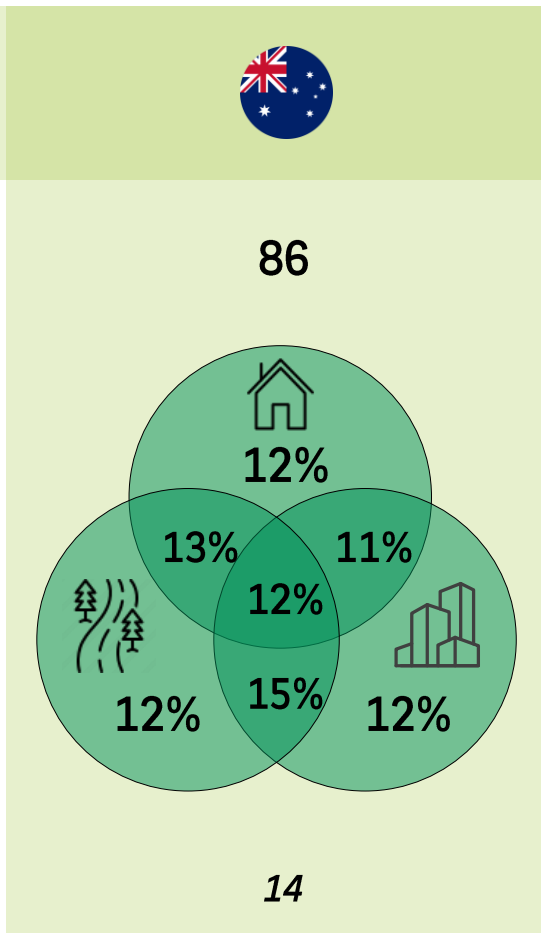
E28B_2. What are the constraints of using electric light commercial vehicles (Battery Electric Vehicles)?
Basis: companies with LCVs and aware of EV technology

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 86% of the companies have at least one charging strategy or will have one in the future.



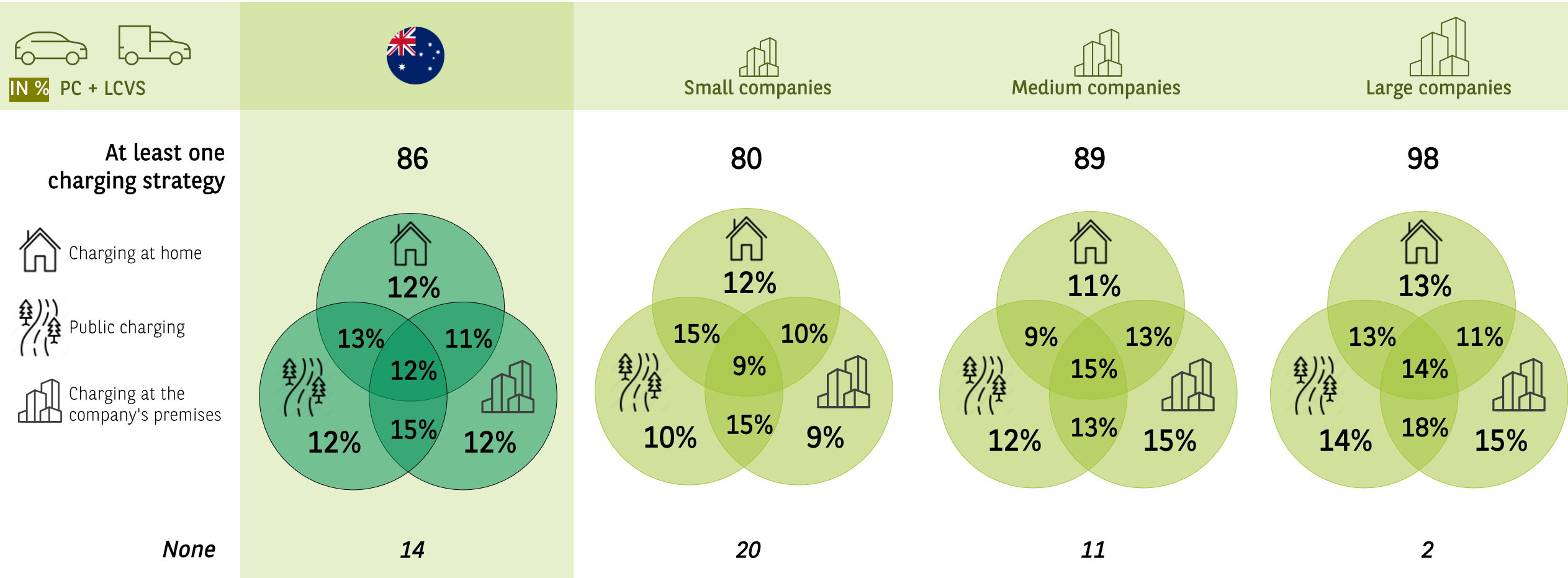
IN % PC + LCVS



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 ?

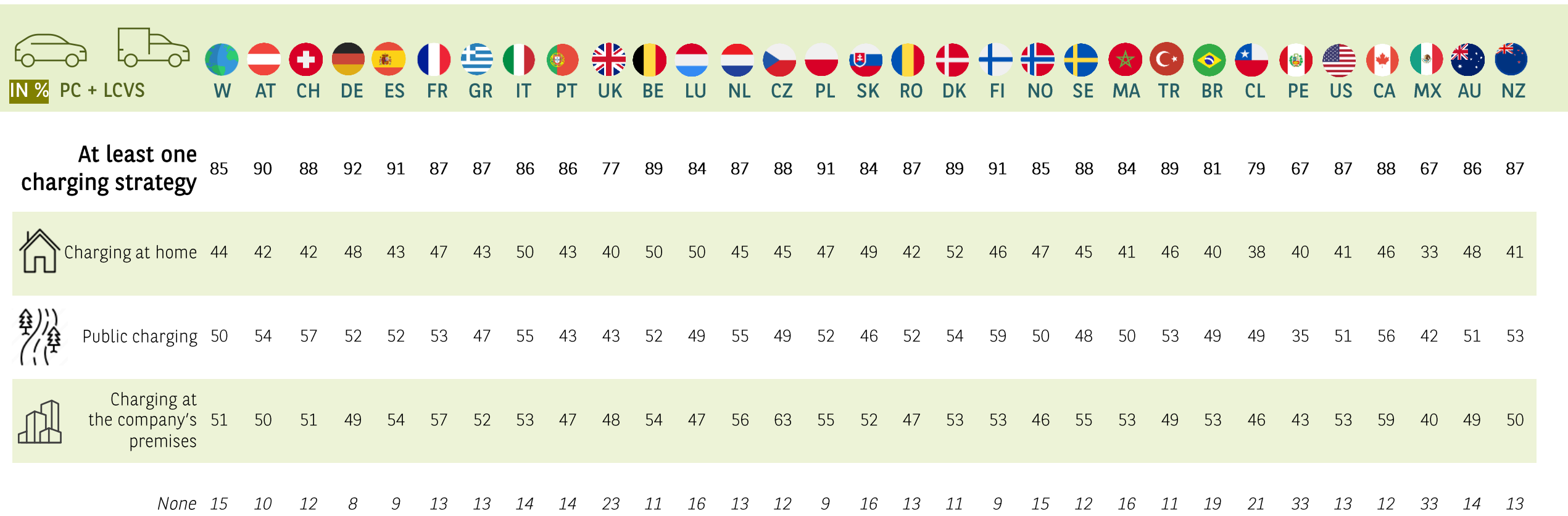
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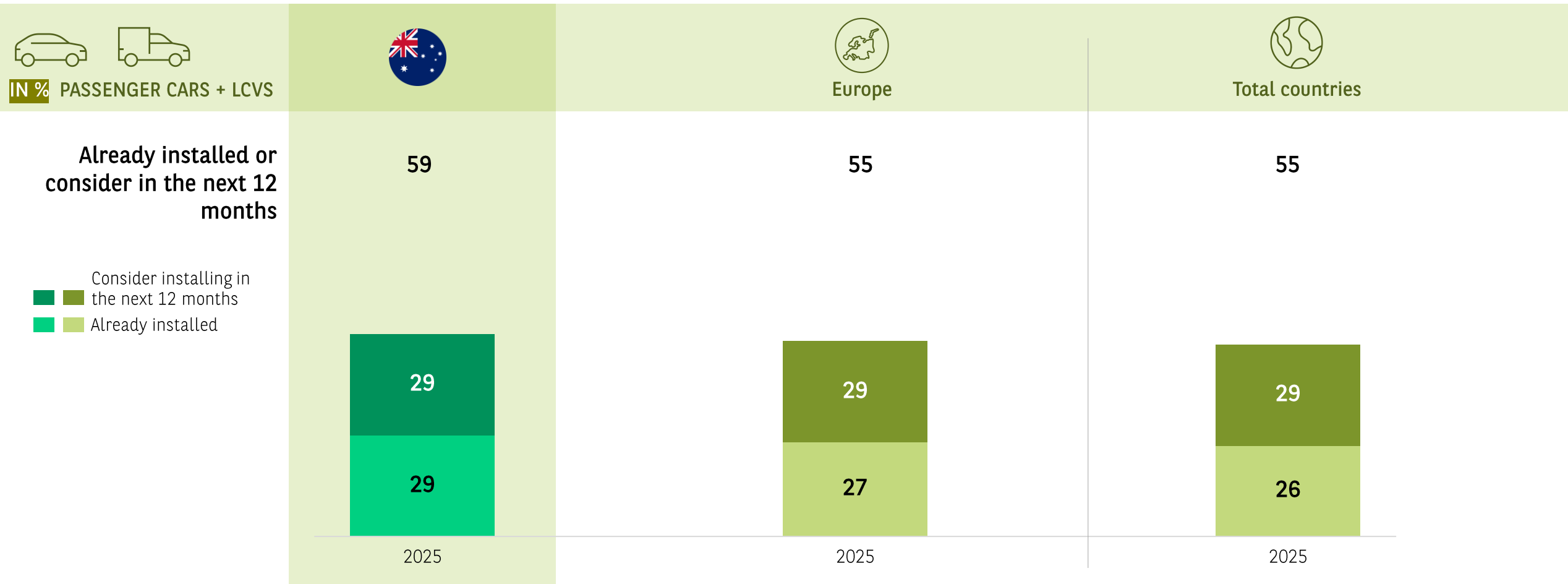


E31. What charging policy does your company currently use, or what policy will it use in the future?
Basis: companies with corporate vehicles = 100%

INSTALLATION OF CHARGING POINTS AT COMPANY'S PREMISES

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 59% 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

INSTALLATION OF CHARGING POINTS AT COMPANY'S PREMISES

New question

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 59% 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.



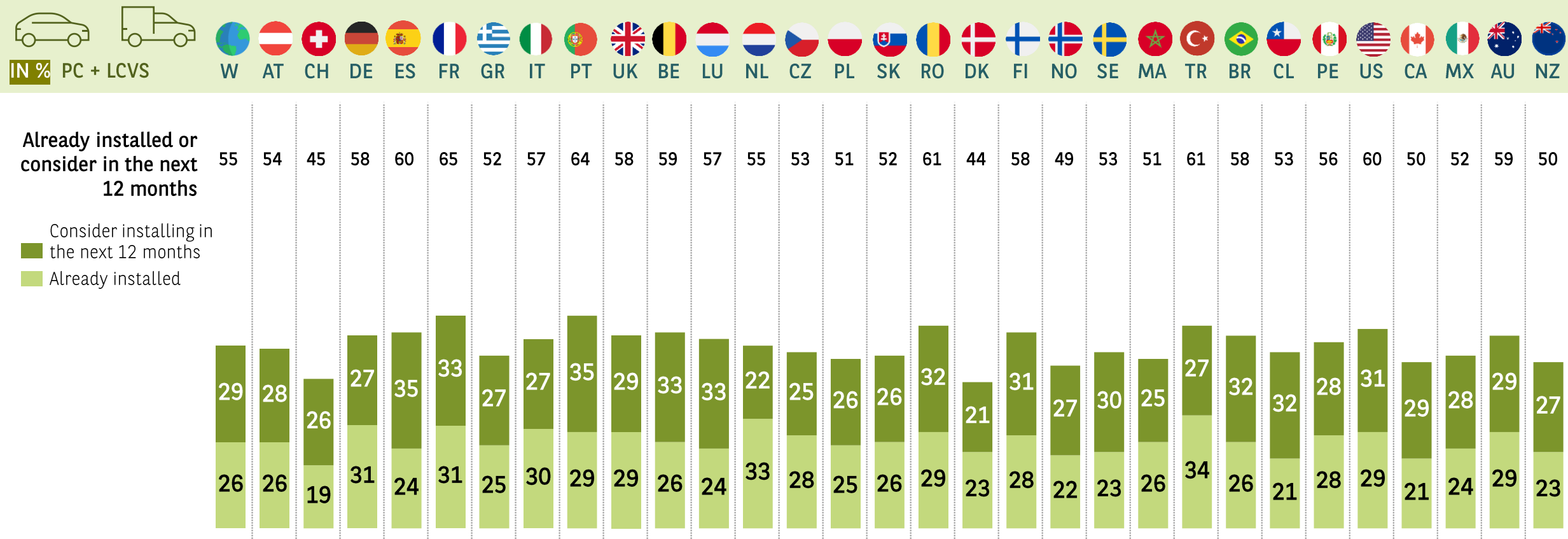
E32. Regarding charging at the company's premises, have you already installed charging points, or are you considering doing so in the next 12 months?
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INSTALLATION OF CHARGING POINTS AT COMPANY'S PREMISES

New question

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 59% 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.

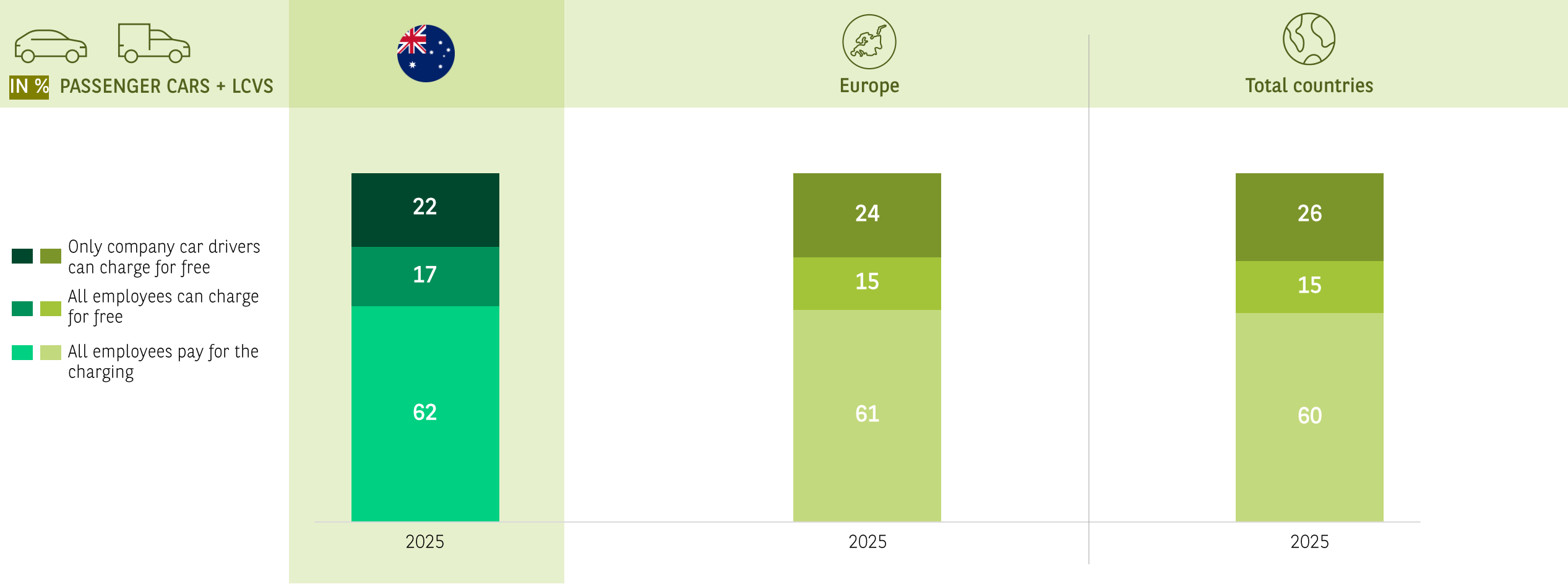


E32. Regarding charging at the company's premises, have you already installed charging points, or are you considering doing so in the next 12 months?
Basis: companies that are using or considering charging at the company's premises

COST MANAGEMENT OF CHARGING AT COMPANY'S PREMISES

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 22% of the companies that have already installed or are considering installing charging points on their premises manage or plan to manage the cost of charging with free charge for company car drivers.

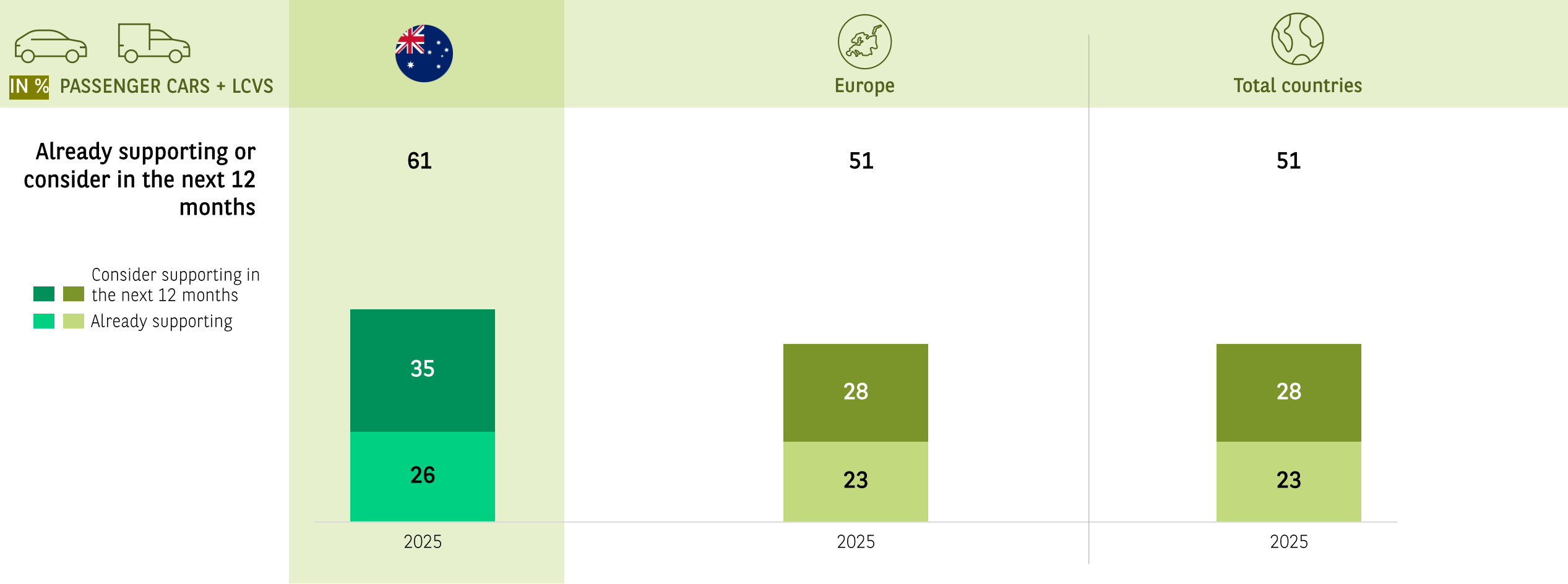


E33. How do you manage or plan to manage the cost of charging at company's premises?
Basis: companies that have already installed or are considering installing charging points on their premises

SUPPORT OF CHARGING POINTS INSTALLATION AT HOME

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 61% of the companies that are using or considering home charging are already supporting company car drivers for the installation of home charging points or are considering doing so in the next 12 months.

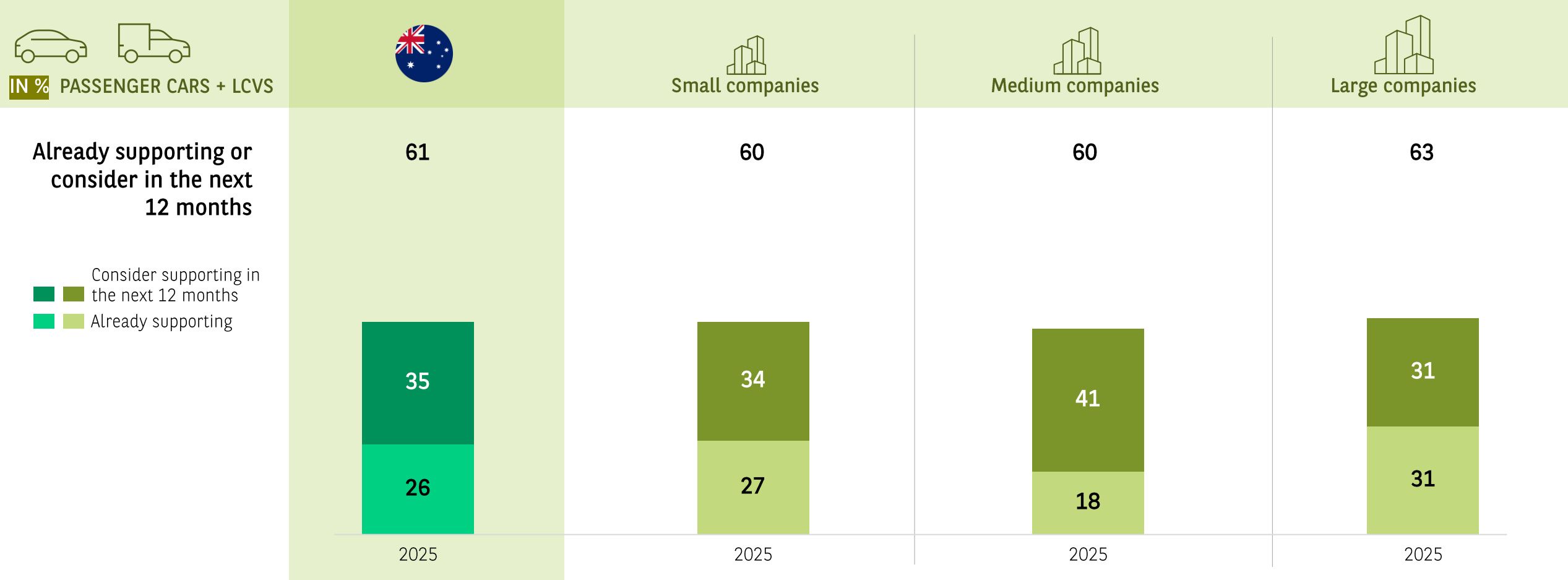


E34. Regarding home charging, does your company support its company car drivers for the installation of home charging points, or is it planned doing so in the next 12 months?
Basis: companies using or considering home charging

SUPPORT OF CHARGING POINTS INSTALLATION AT HOME

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 61% of the companies that are using or considering home charging are already supporting company car drivers for the installation of home charging points or are considering doing so in the next 12 months.



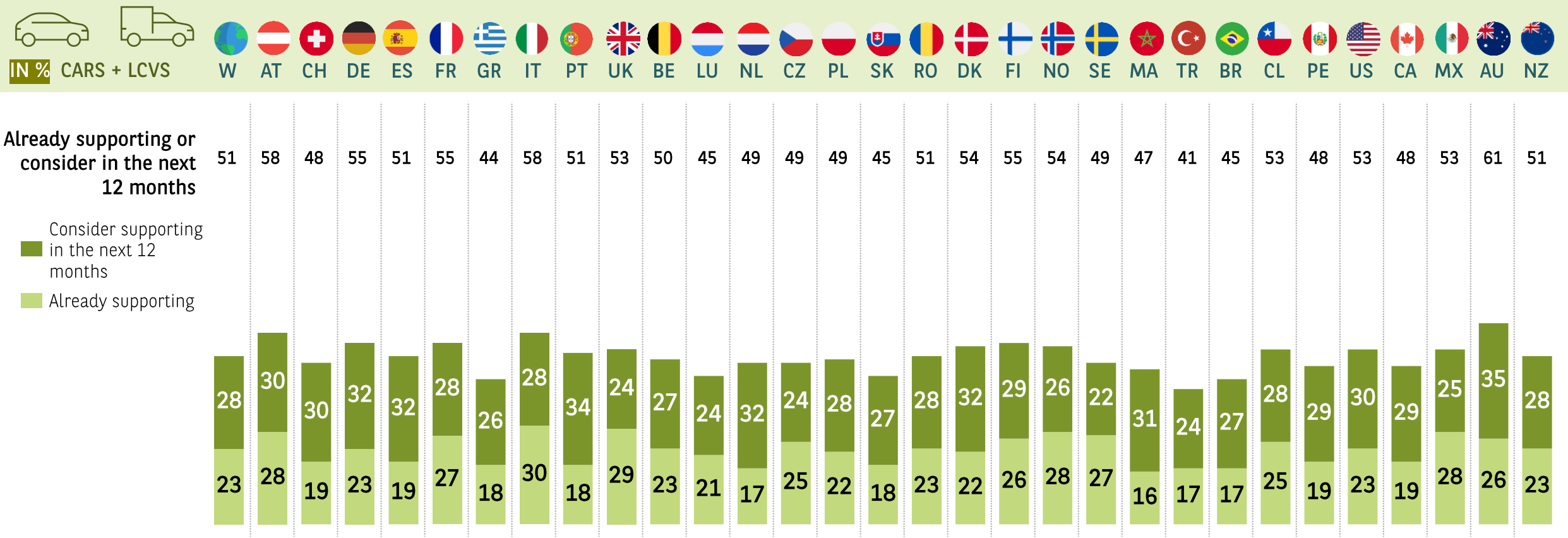
E34. Regarding home charging, does your company support its company car drivers for the installation of home charging points, or is it planned doing so in the next 12 months?
Basis: companies with charging at home

SUPPORT OF CHARGING POINTS INSTALLATION AT HOME

New question

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 61% of the companies that are using or considering home charging are already supporting company car drivers for the installation of home charging points or are considering doing so in the next 12 months.

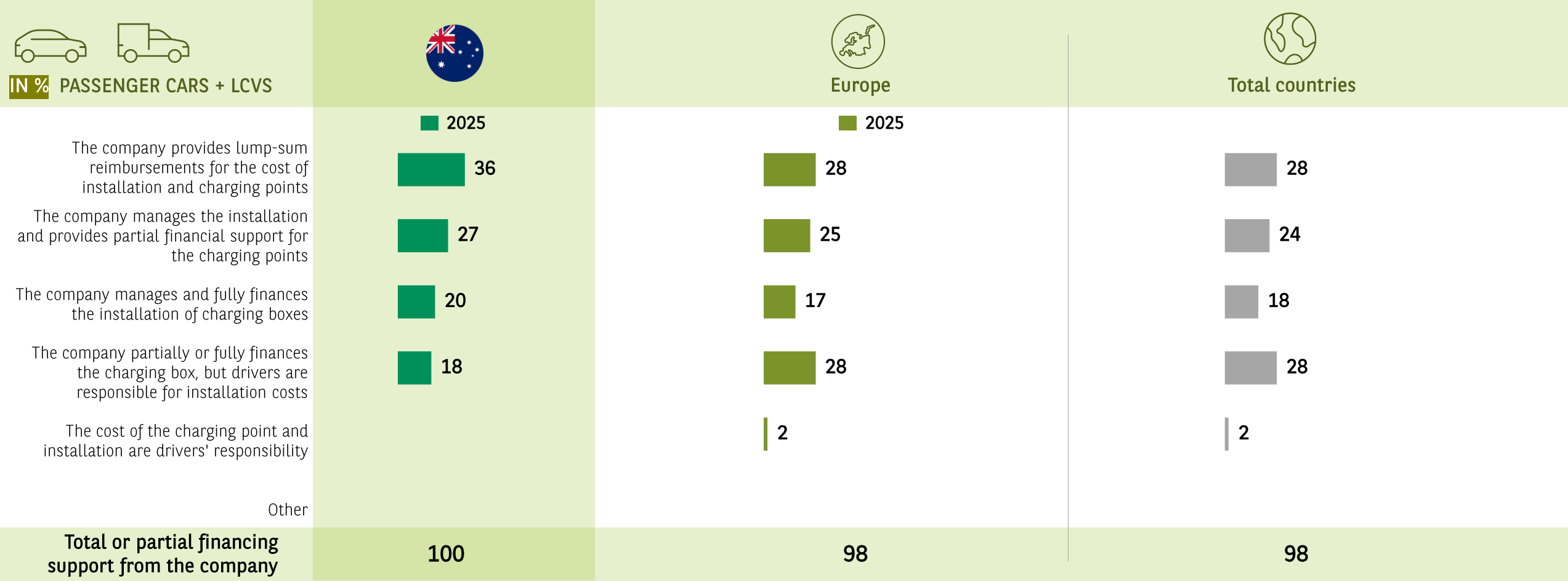


E34. Regarding home charging, does your company support its company car drivers for the installation of home charging points, or is it planned doing so in the next 12 months?
Basis: companies with charging at home

SUPPORT OF CHARGING POINTS INSTALLATION AT HOME

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 36% of the companies that are already supporting or are considering supporting charging points installation at home have the following policy : "The company provides lump-sum reimbursements for the cost of installation and charging points"

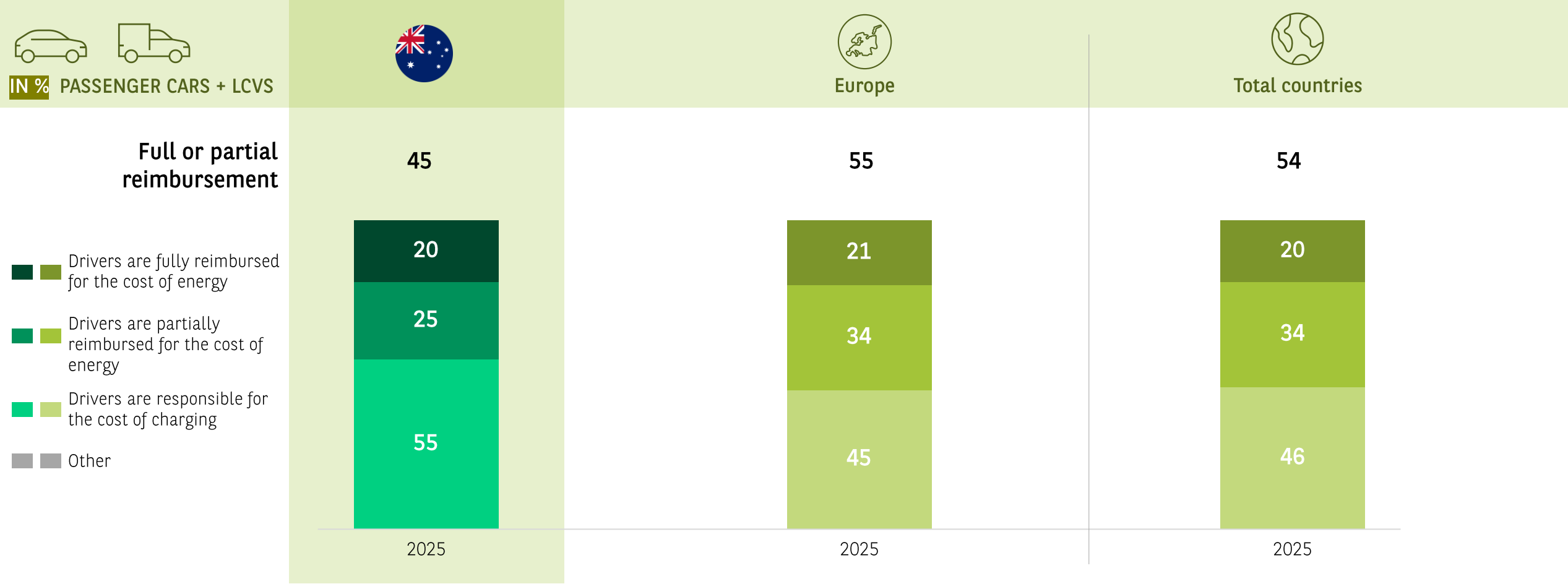


E35. Regarding home charging, how does your company currently support, or plan to support, its company car drivers with the installation of home charging points?
 Basis: companies that are already supporting or are considering supporting charging points installation at home

SUPPORT OF ENERGY COST OF HOME CHARGING POINTS

HOW TO READ THE RESULTS ?

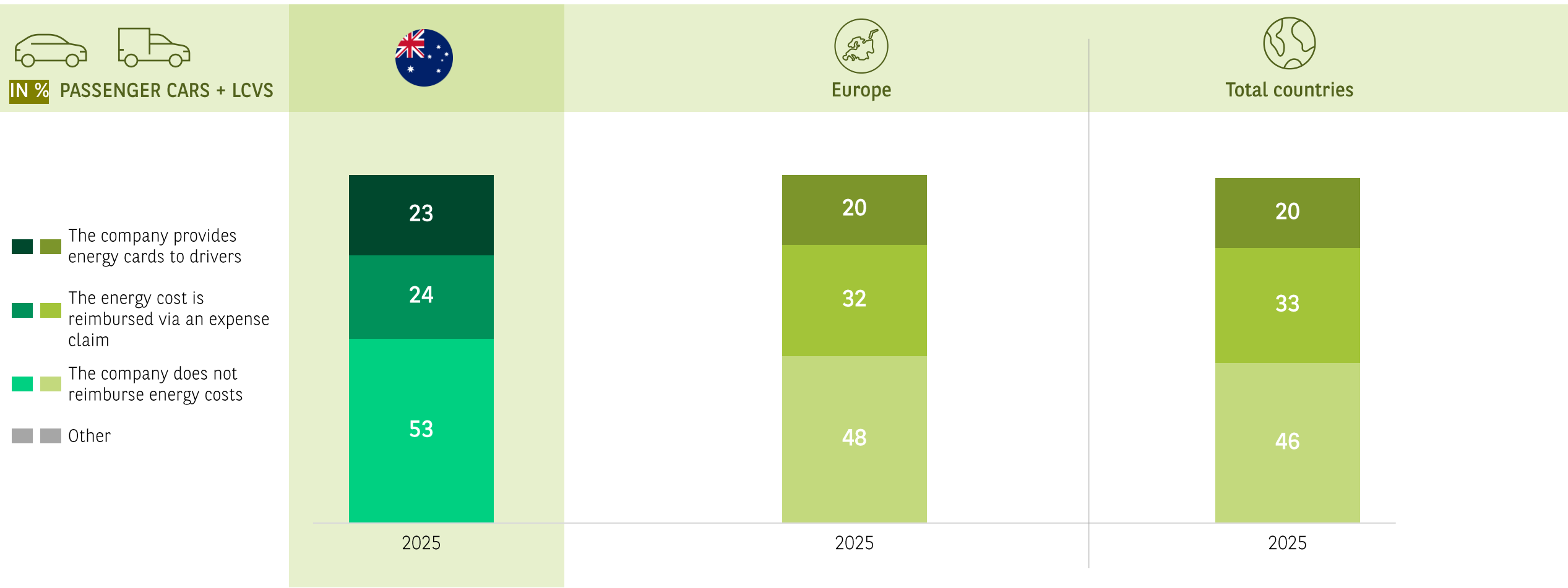
Among the Australian companies surveyed in 2025, 20% of the companies that are already supporting or are considering supporting charging points installation at home fully reimburse drivers for the cost of energy, or plan doing so.



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

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 23% of the companies that are using or considering public charging provide energy cards to drivers.



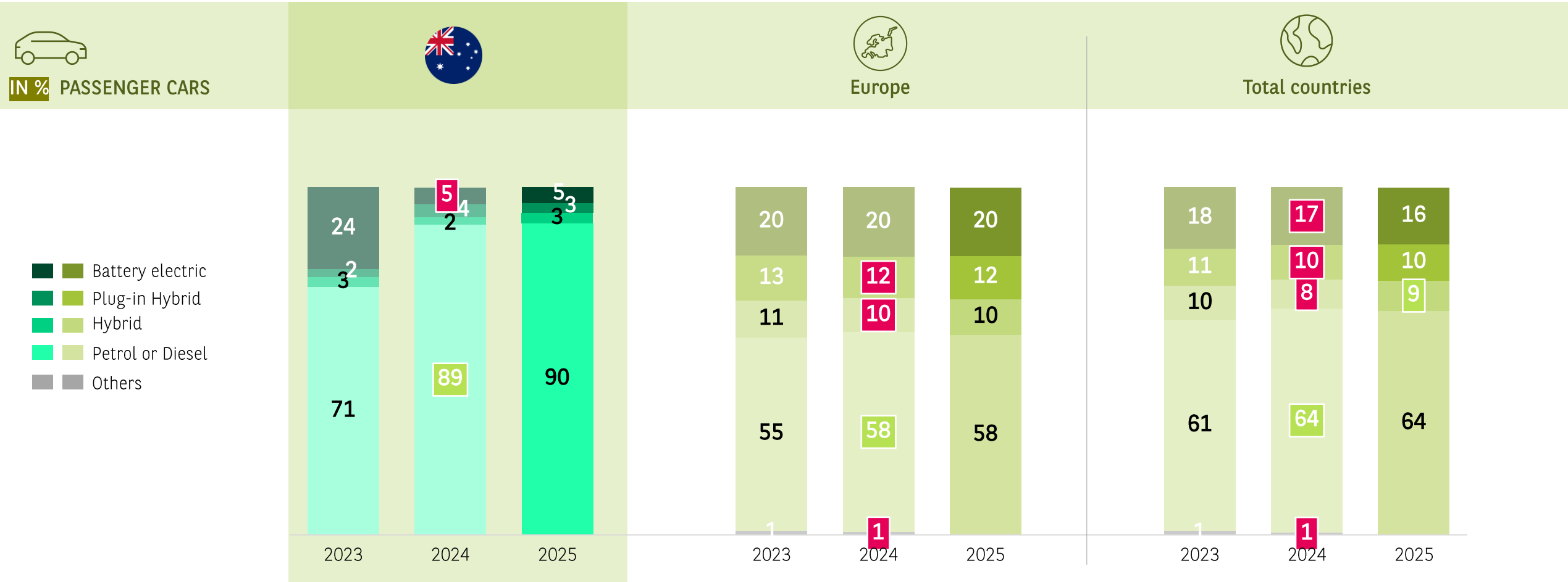
E37. Regarding public charging, how does your company manage or plan to manage the energy costs incurred by company car drivers?
Basis: companies using or considering public charging

EXPECTED FLEET SHARE PER ENERGY

FOCUS ON PASSENGER CARS

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed, in 3 years, 5% of the passenger car fleet is expected to be BEV.



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

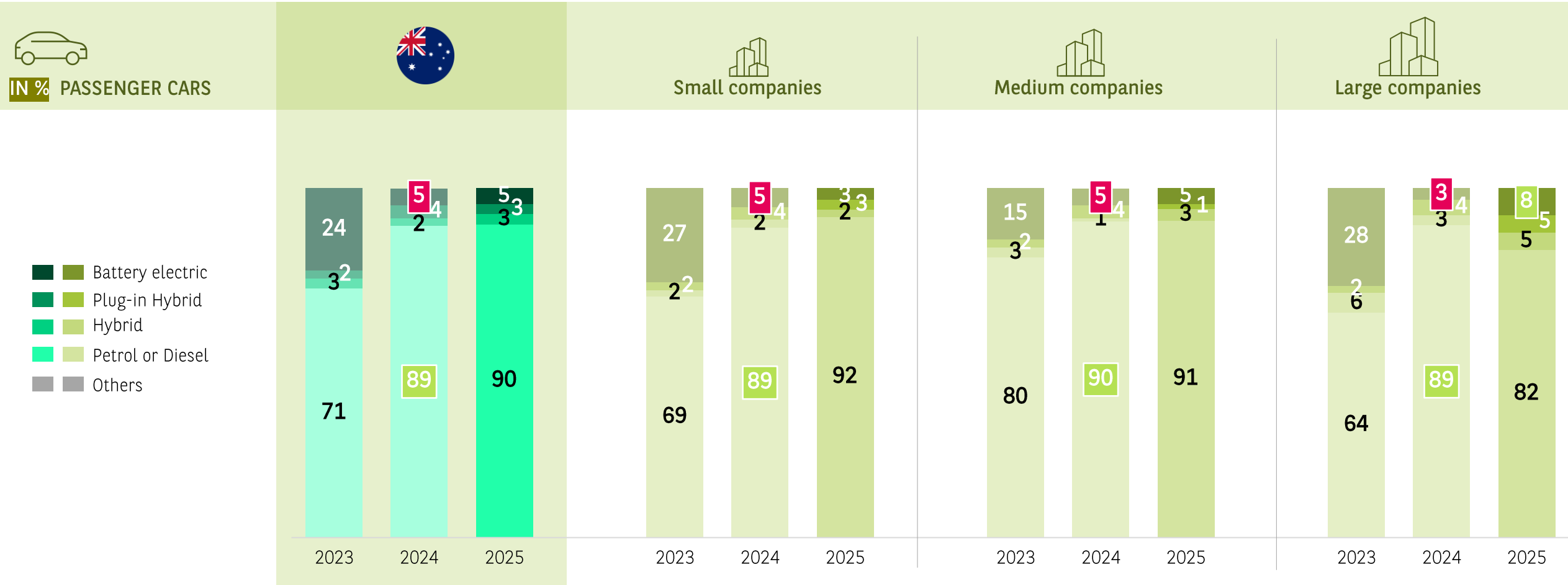
X% Significantly higher / lower vs. previous wave

EXPECTED FLEET SHARE PER ENERGY

FOCUS ON PASSENGER CARS

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed, in 3 years, 5% of the passenger car fleet is expected to be BEV.



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

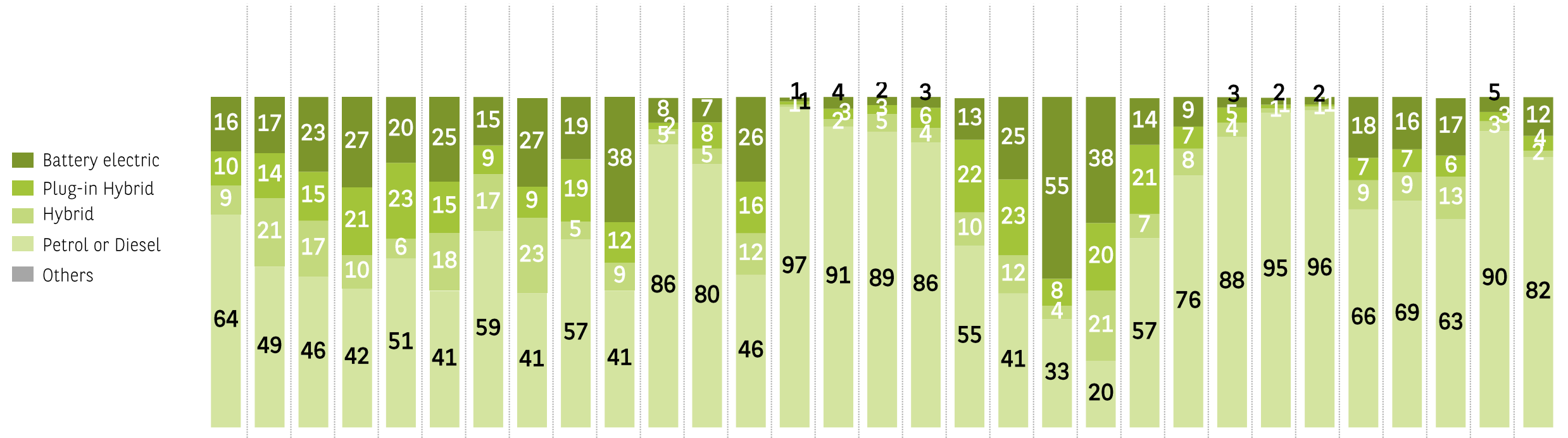
FOCUS ON PASSENGER CARS

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed, in 3 years, 5% of the passenger car fleet is expected to be BEV.



IN % CARS



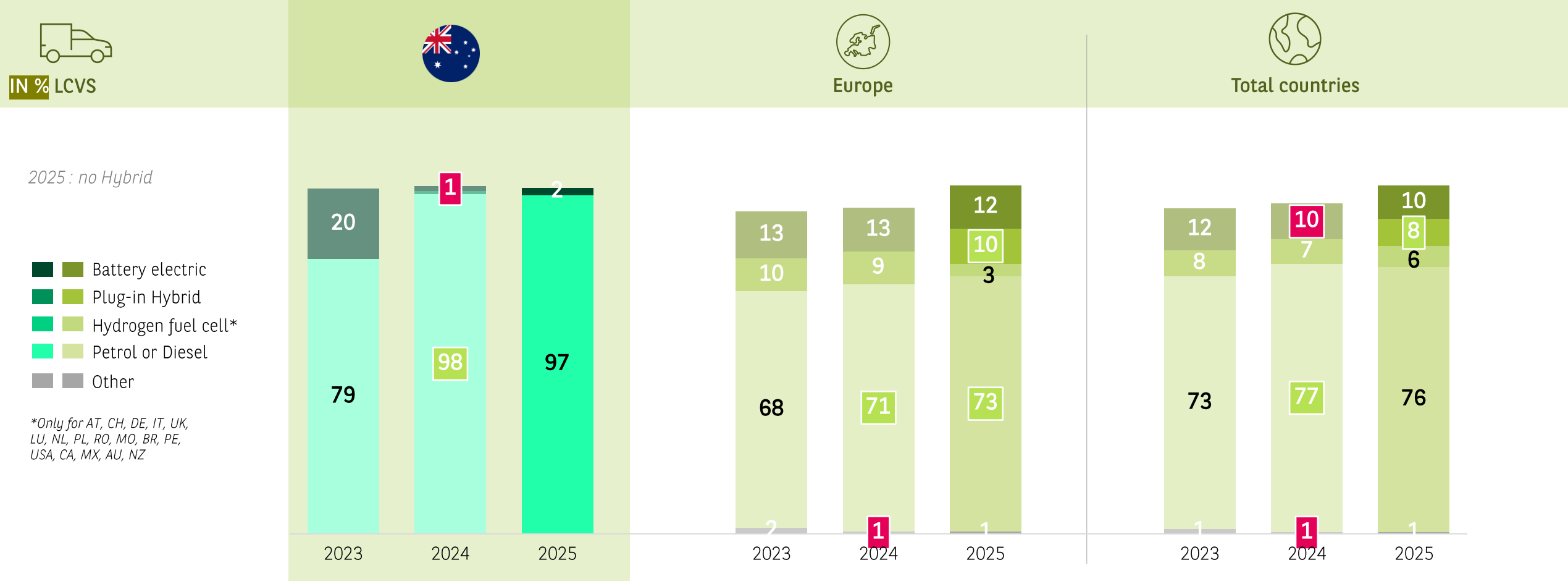
A52. What percentage of your passenger car fleet do you expect to be: battery electric, Plug-in Hybrid, Hybrid, petrol or diesel vehicles in 3 years?
Basis: companies with passenger cars

EXPECTED FLEET SHARE PER ENERGY

FOCUS ON LCVs

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed, in 3 years, 2% of the LCV fleet is expected to be BEV.



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

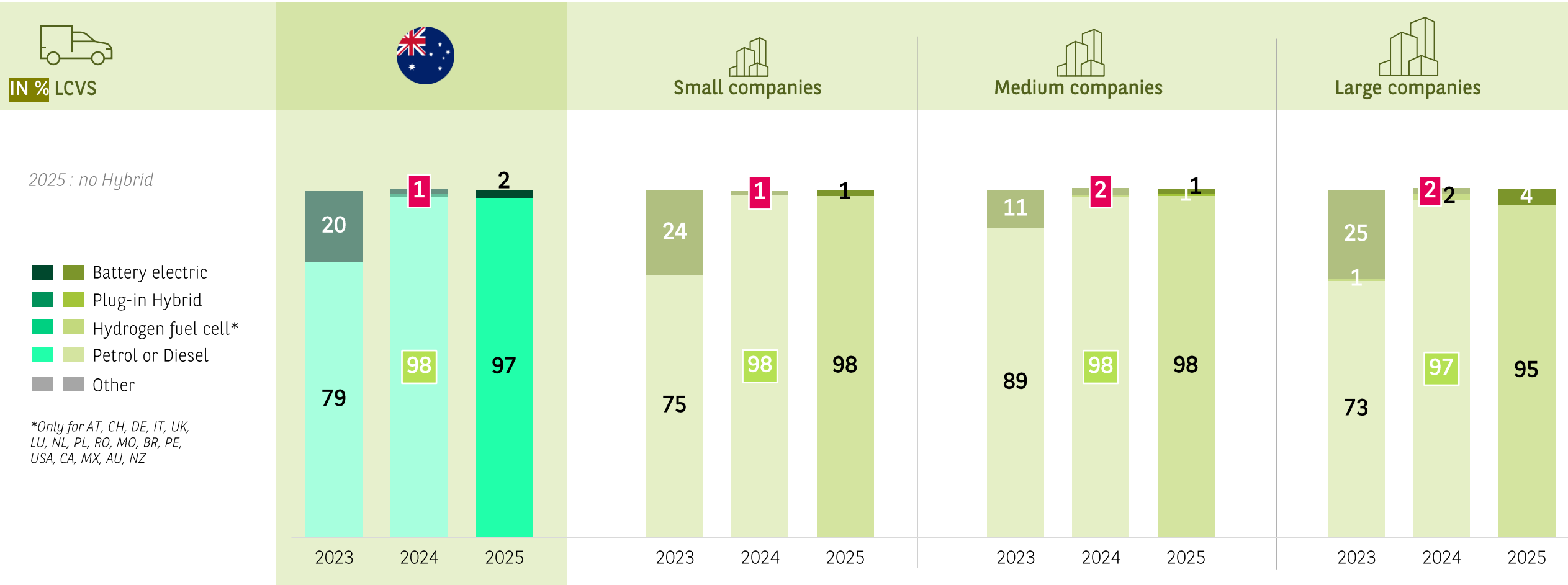
X% Significantly higher / lower vs. previous wave

EXPECTED FLEET SHARE PER ENERGY

FOCUS ON LCVs

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed, in 3 years, 2% of the LCV fleet is expected to be BEV.



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

X% Significantly higher / lower vs. previous wave

EXPECTED FLEET SHARE PER ENERGY

FOCUS ON LCVS

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed, in 3 years, 2% of the LCV fleet is expected to be BEV.

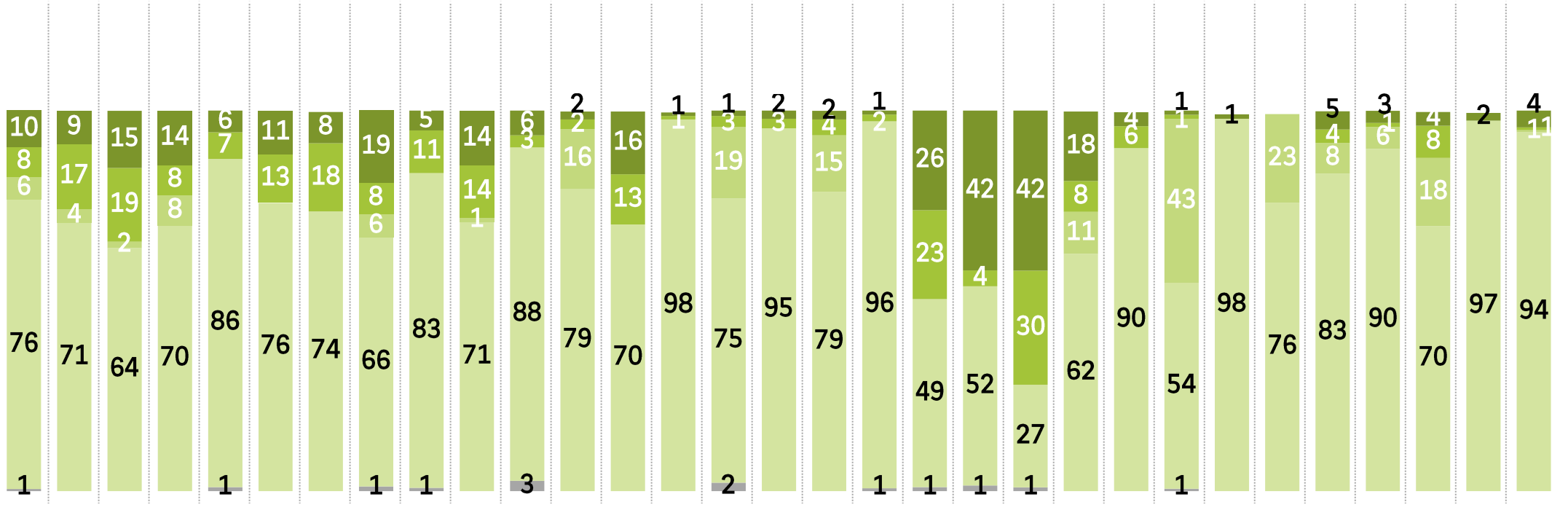


IN % LCVS



2025: no Hybrid

- Battery electric
- Plug-in Hybrid
- Hydrogen fuel cell*
- Petrol or Diesel
- Other



*Only for AT, CH, DE, IT, UK, LU, NL, PL, RO, MO, BR, PE, USA, CA, MX, AU, NZ

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

MAIN REASONS TO START ORDERING MORE BEV

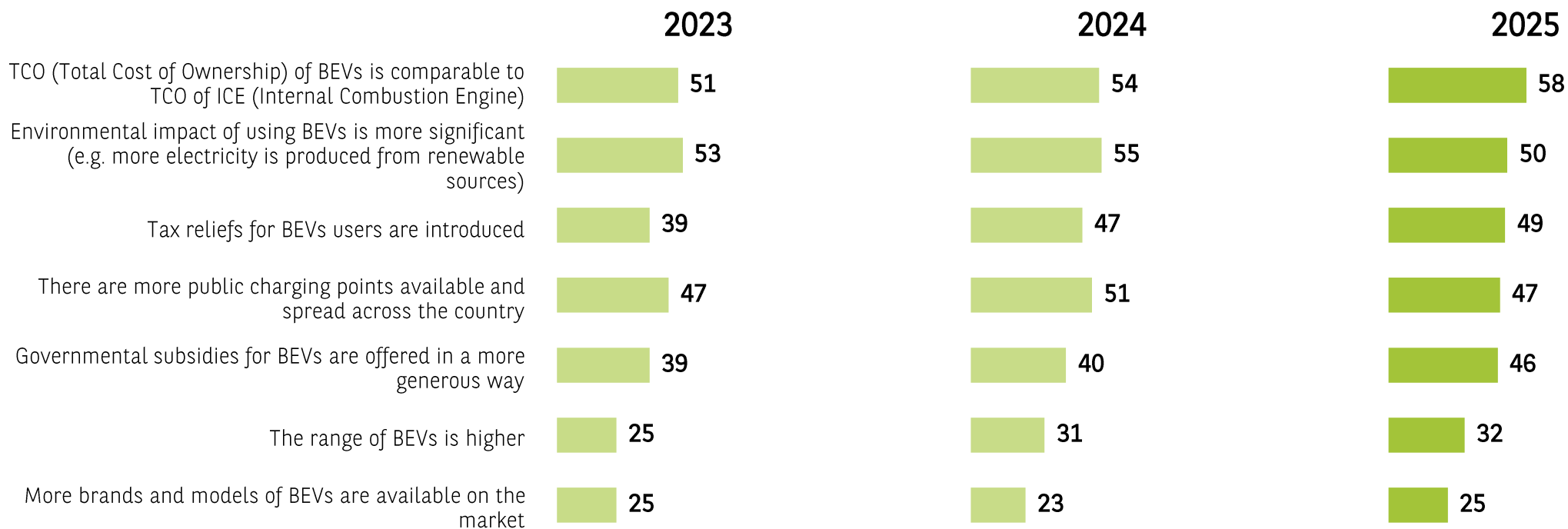
HOW TO READ THE RESULTS ?

In 2025, 58% of the Australian companies surveyed that are already using or considering BEV for passenger cars or LCV declare that the main reason to start ordering more BEV is: TCO (Total Cost of Ownership) of BEVs is comparable to TCO of ICE (Internal Combustion Engine).



Local question

IN % PASSENGER CARS + LCVS



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

X% Significantly higher/lower vs. previous wave

CAR POLICY FOR ELECTRIC VEHICLES IN TERMS OF BRAND SELECTION

HOW TO READ THE RESULTS ?

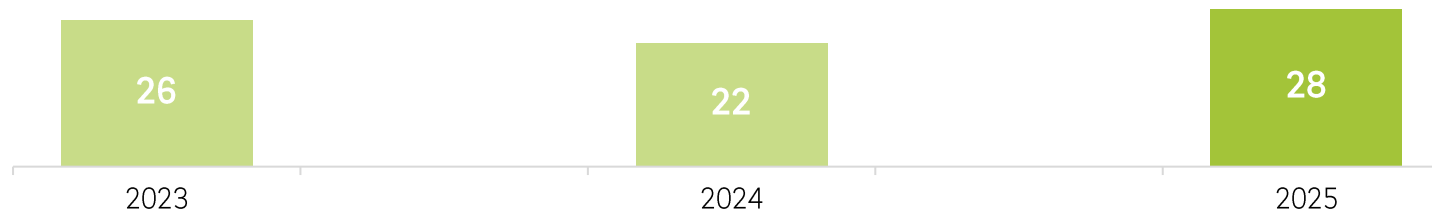
In 2025, 28% of the Australian companies surveyed that are already using or considering BEV/PHEV for passenger cars or LCV have expanded the car policy for electric vehicles in terms of brand selection.



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 remains stable in Australian fleets in 2025, aligned with European trend

37% of Australian companies surveyed have adopted connected vehicles, vs 38% for the European average. 20% have connected passenger cars and 24% have connected LCVs. Both figures are stable compared to the previous year. Large companies tend to have more connected vehicles (51%), especially for passenger cars (38%).

The use of data coming from telematics remains marginal but the consideration high

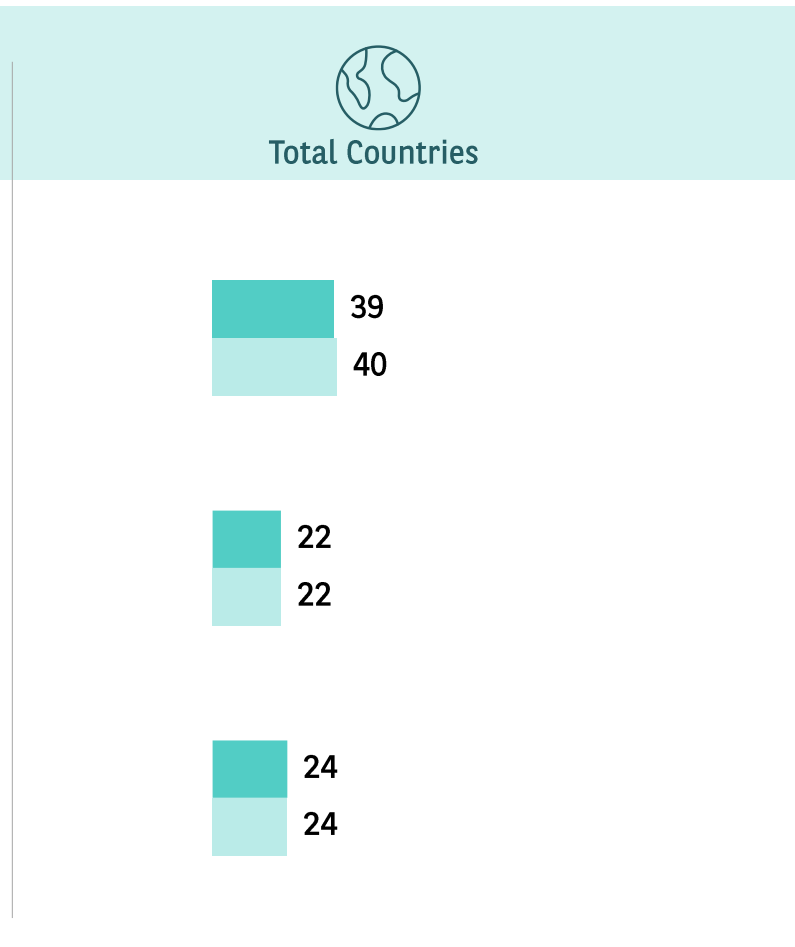
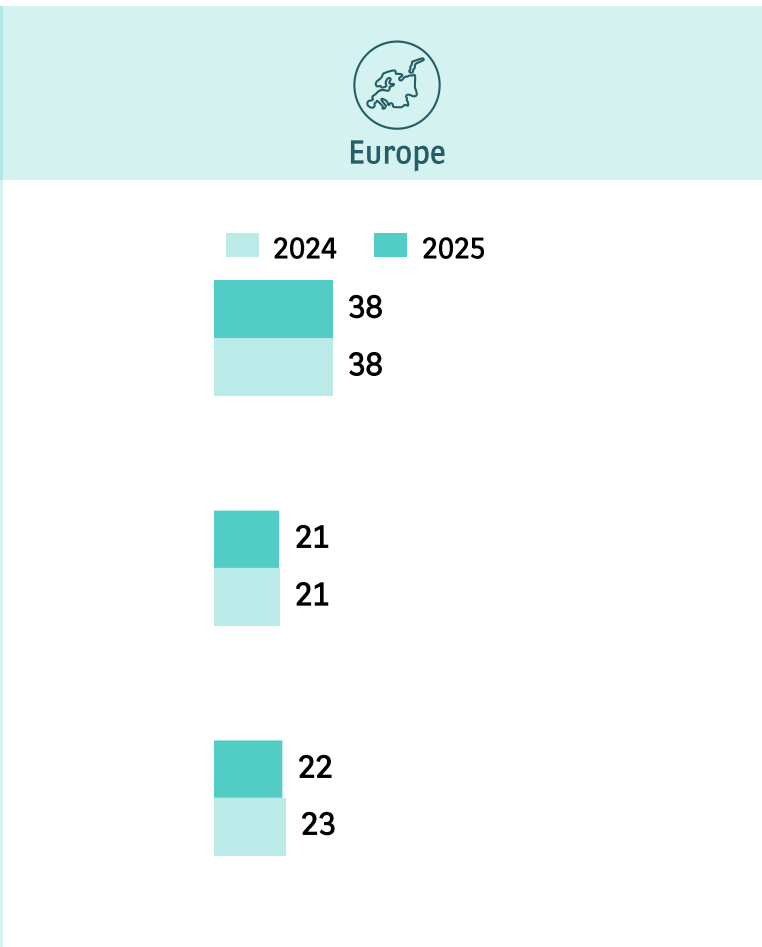
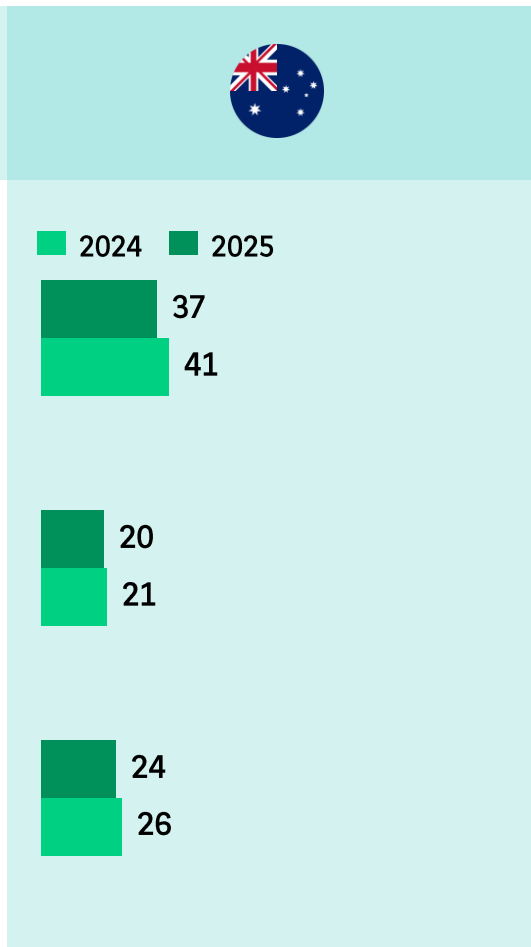
Telematics data usage remains low at **16%**. But interest in leveraging this data is high, with **47%** of companies considering its use.

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 37% of the companies have connected vehicles for all or part of their fleet. 20% have connected passenger cars and 24% have connected LCVs.

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



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

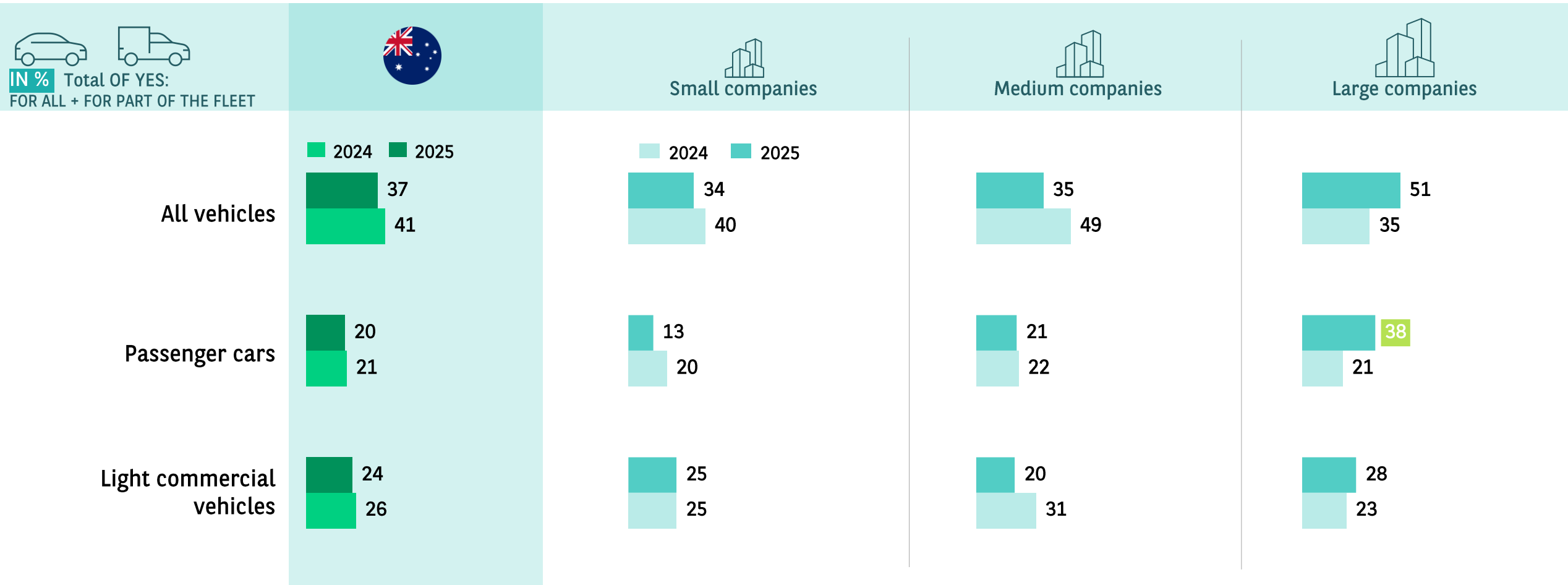
X% Significantly higher / lower vs. previous wave

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 37% of the companies have connected vehicles for all or part of their fleet.

20% have connected passenger cars and 24% have connected LCVs.



E23c. Is your fleet connected thanks to a telematic tool?

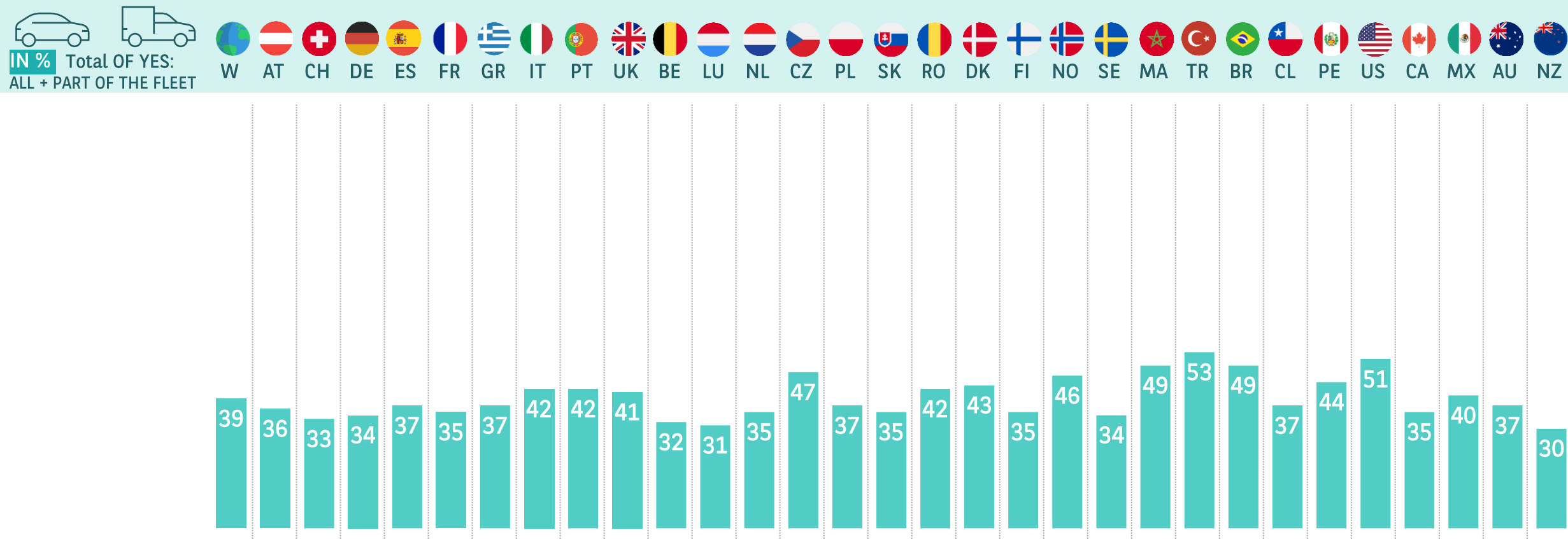
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 37% of the companies have connected vehicles for all or part of their fleet.

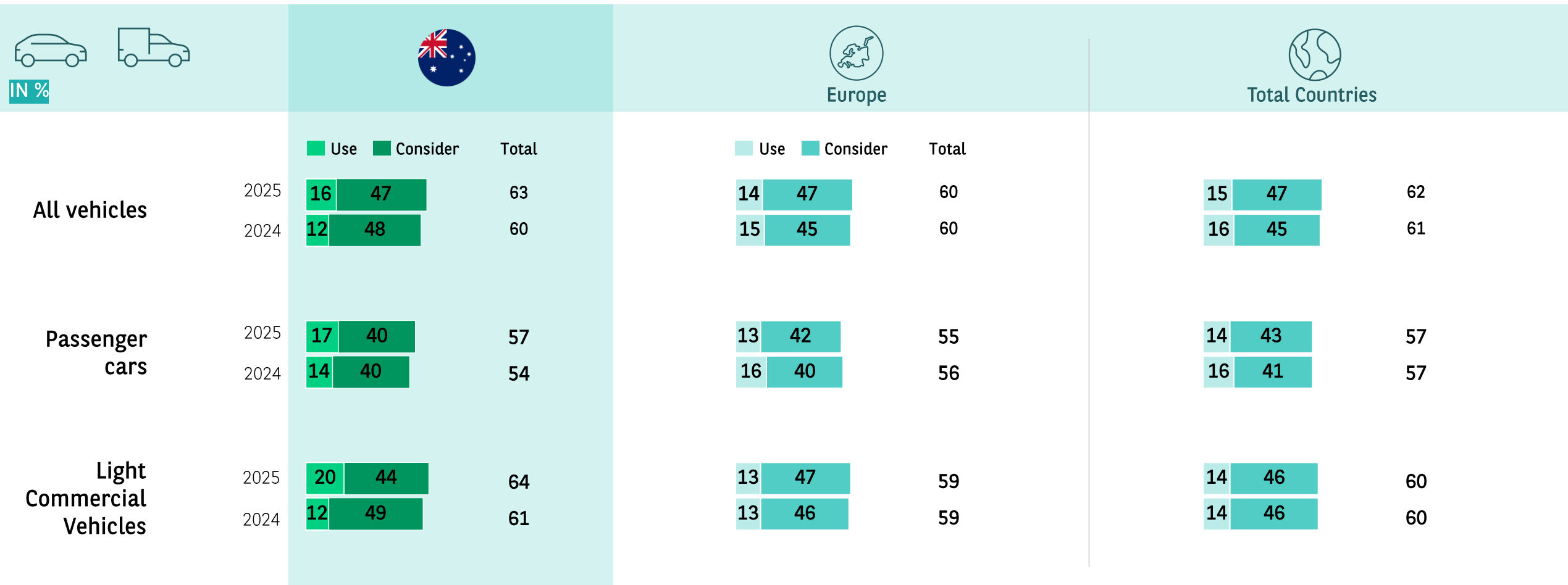


E23c. Is your fleet connected thanks to a telematic tool?
Basis: companies with corporate vehicles = 100%

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 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.



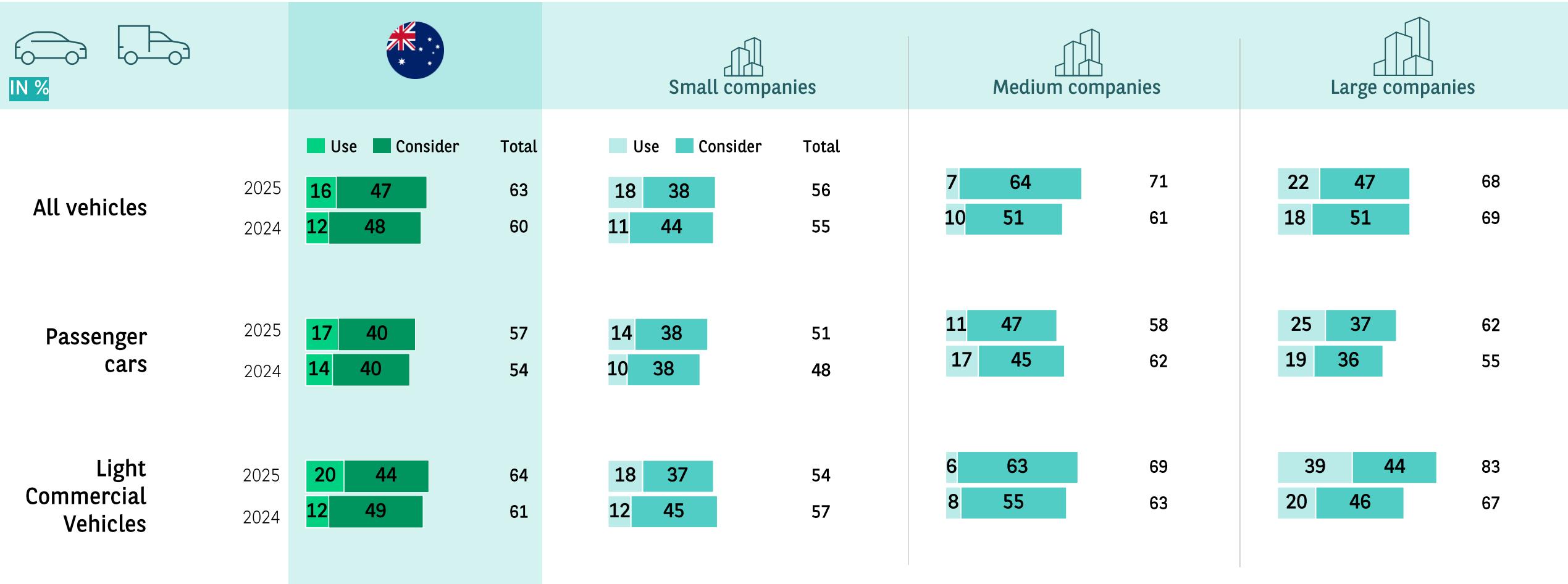
E23d. Do you use or consider using the data coming from the vehicle box thanks to a telematics platform ?
Basis: companies with connected vehicles thanks to a telematic tool

X% Significantly higher / lower vs. previous wave

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 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.



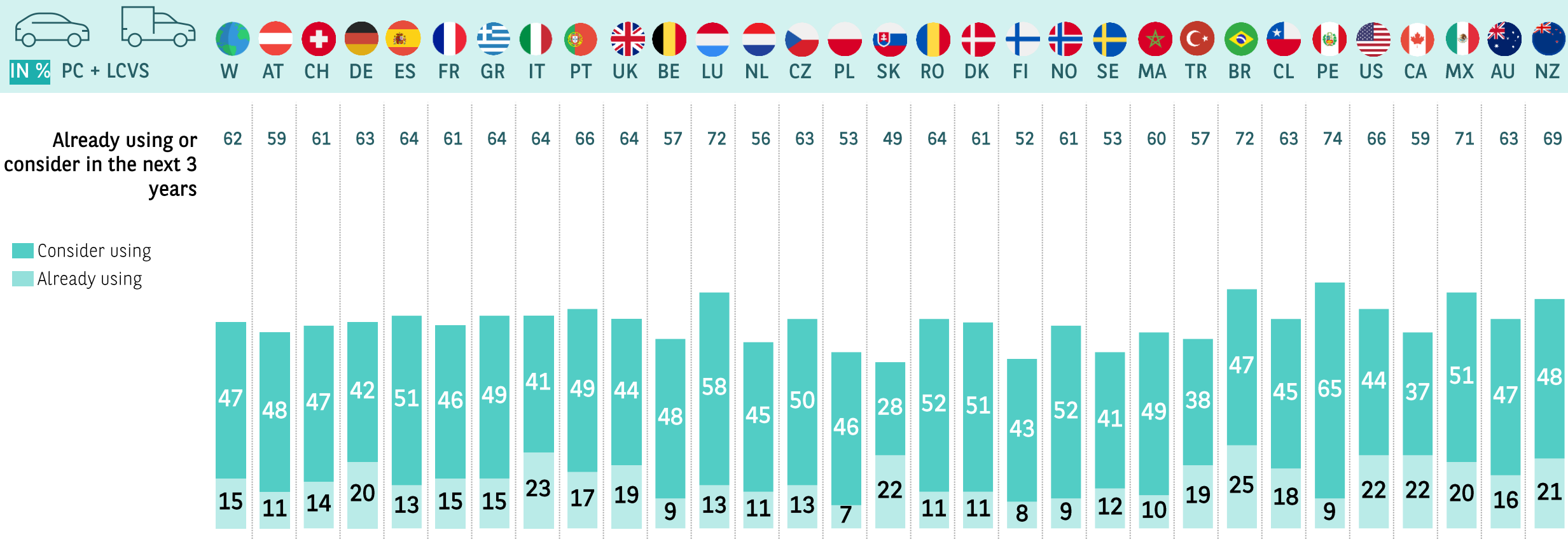
E23d. Do you use or consider using the data coming from the vehicle box thanks to a telematics platform ?
Basis: companies with connected vehicles thanks to a telematic tool

X% Significantly higher / lower vs. previous wave

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 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

05

EMPLOYEE MOBILITY

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



A strong commitment to employee mobility by Australian companies for 2025

77% of them have implemented at least one mobility policy or are considering doing so, and **76%** have implemented at least one mobility solution or are considering doing so. Australian companies surveyed are aligned with the European benchmark for policies (77% vs 77%) and above regarding solutions (76% vs 58%).

Three mobility policies/solutions stand out: personal vehicle expense reimbursement, a card to pay mobility solutions and private lease or salary sacrifice

These 3 mobility policies/solutions stand out in 2025 in terms of usage or consideration: personal vehicle expense reimbursement (**42%** of use or consideration vs 16% in average in the European benchmark), A card provided by the company to pay multiple mobility solution (**36%** vs 20% in Europe) and Private lease or salary sacrifice (**33%** vs 13% in Europe).

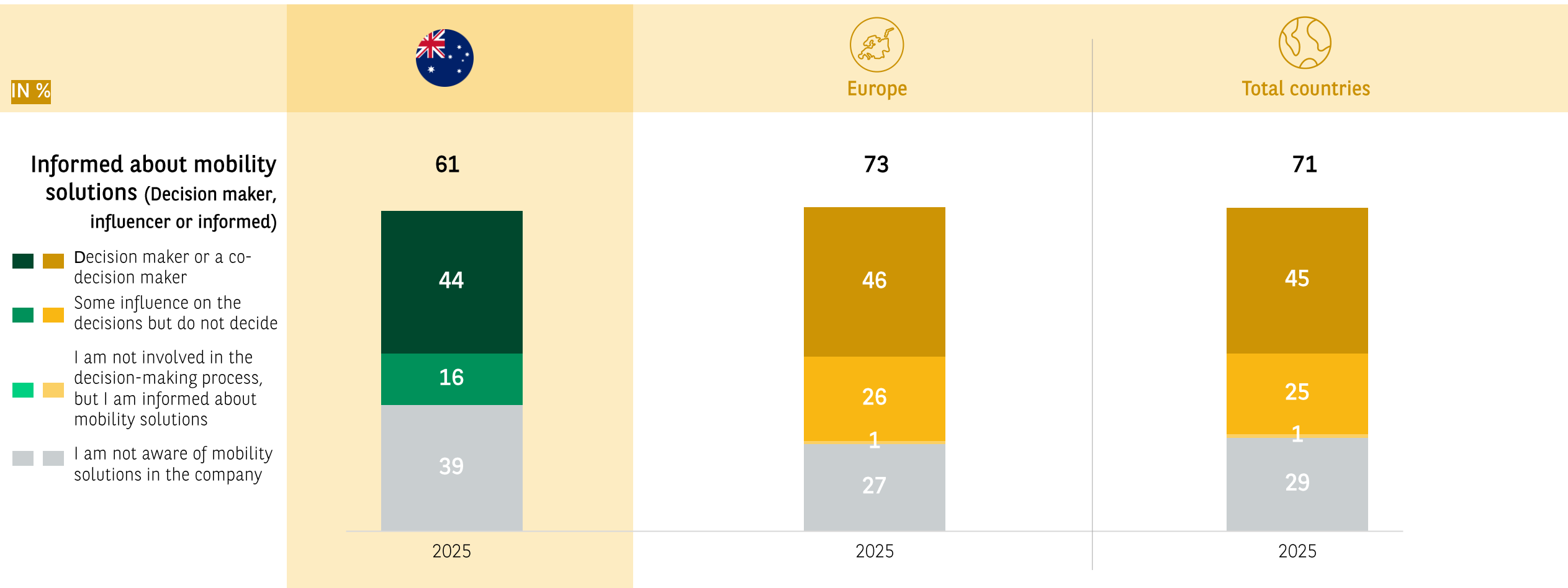
Mobility policies and solutions are motivated by HR needs, tax benefits and CSR policies

HR related needs (**56%** of the companies with policies and **53%** with solutions), tax benefits (**47%** of the companies with policies and **45%** with solutions), and compliance to CSR policies (**46%** of the companies with policies and **43%** with solutions) are primary drivers for implementing mobility options to employees.

RESPONDENTS' INVOLVEMENT IN MOBILITY SOLUTION DECISIONS

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 61% 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 IMPLEMENTATION

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 12% of the companies are already using Public transport expense reimbursement or are considering doing so in the next 3 years.

IN %				 Europe			 Total countries		
	Use	Consider	Total	Use	Consider	Total	Use	Consider	Total
At least one mobility policy	50	28	77	58	19	77	56	23	79
Public transport expense reimbursement	75		12	21	11	33	19	13	32
Personal vehicle expense reimbursement	23	20	42	8	8	16	8	11	19
Mobility Budget	4	15	19	16	12	28	15	13	29
Private lease or salary sacrifice	22	10	33	6	7	13	6	9	15
A short or mid-term rental vehicle	14	15	28	18	10	28	17	12	29
Car or cash allowance	15	8	23	18	12	30	17	13	30




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%

MOBILITY POLICIES IMPLEMENTATION

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 12% of the companies are already using Public transport expense reimbursement or are considering doing so in the next 3 years.

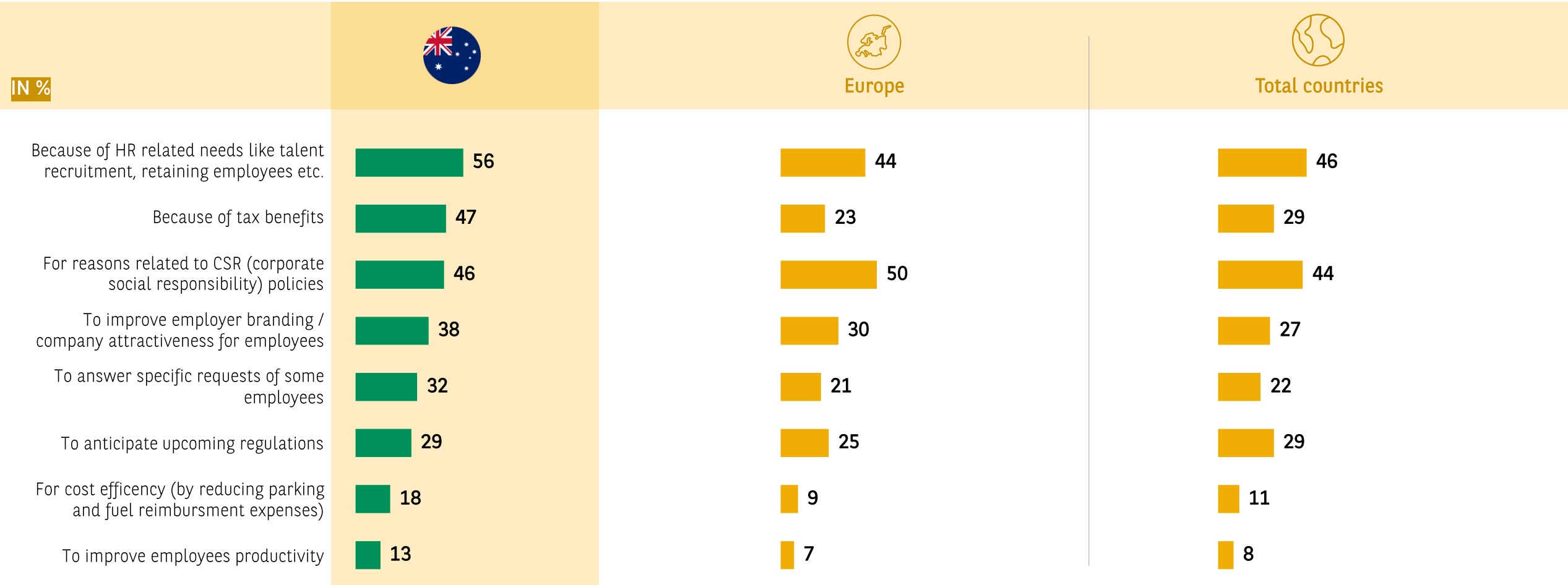
											
			2023	2024	2025	2023	2024	2025	2023	2024	2025
			IN %								
New item	Public transport expense reimbursement	Use			7			21			19
		Total			12			33			32
New item	Personal vehicle expense reimbursement	Use			23			8			8
		Total			42			16			19
	Mobility Budget	Use	7	8	4	15	15	16	16	15	15
		Total	16	18	19	26	26	28	28	28	29
	Private lease or salary sacrifice	Use	10	20	22	14	15	6	13	13	6
		Total	21	37	33	24	24	13	24	24	15
	A short or mid term rental vehicle	Use	8	8	14	19	19	18	18	17	17
		Total	19	18	28	28	28	28	28	27	29
	Car or cash allowance	Use	9	14	15	16	17	18	17	17	17
		Total	19	19	23	26	27	30	28	28	30

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 ?

Among the Australian companies surveyed in 2025, 56% of the companies declare that the main reason for introducing mobility policies is: Because of HR related needs like talent recruitment, retaining employees etc..

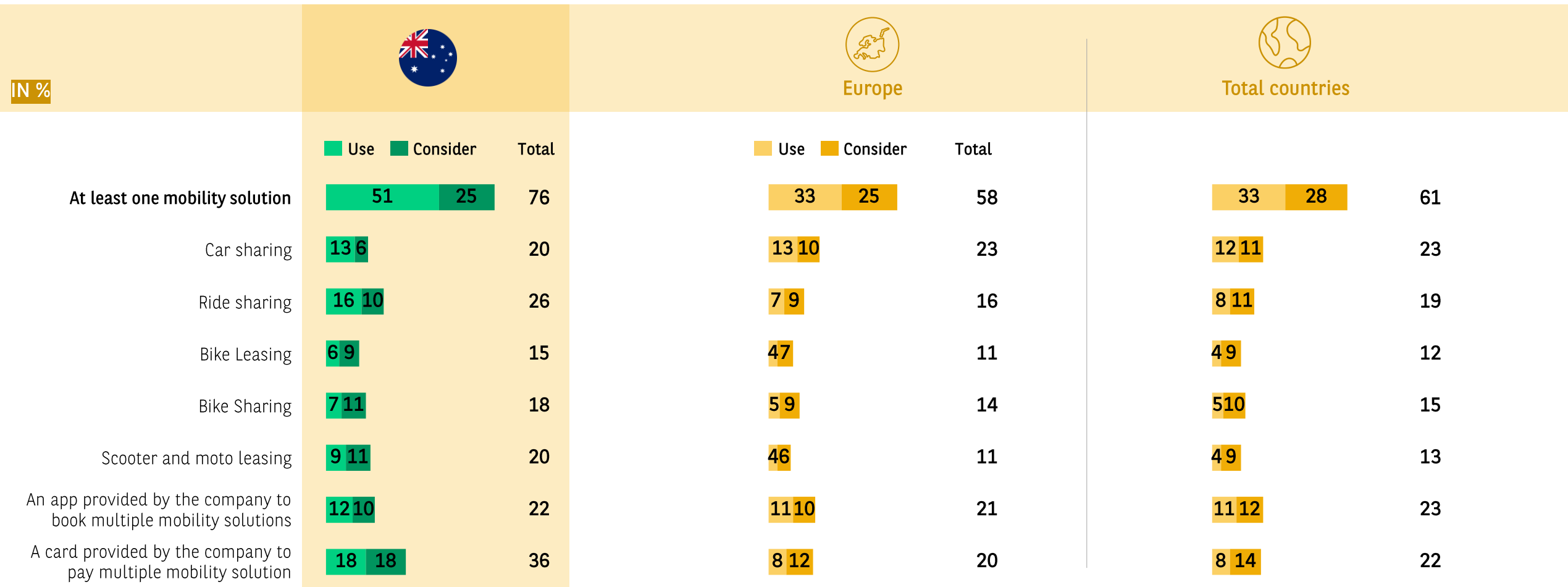


MM14. For what reasons has your company introduced, or does your company intend to introduce, these mobility policies?
Basis: companies using or considering at least one mobility policy

MOBILITY SOLUTIONS IMPLEMENTATION

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 20% 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%

MOBILITY SOLUTIONS IMPLEMENTATION

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 20% of the companies are already using Car sharing or are considering doing so in the next 3 years.

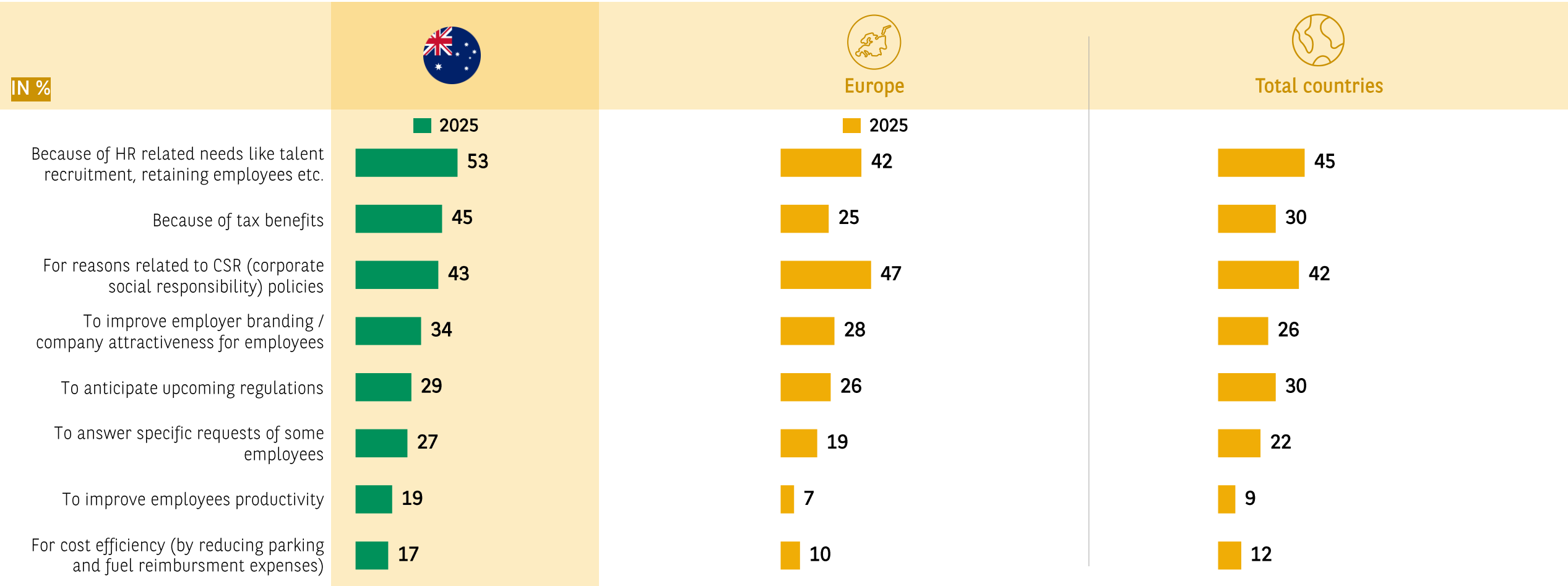
											
			2023	2024	2025	2023	2024	2025	2023	2024	2025
			IN %								
Change of definition	Car sharing	Use			13			13			12
		Total			20			23			23
Change of definition	Ride sharing or car pooling	Use			16			7			8
		Total			26			16			19
New item	Bike Leasing	Use			6			4			4
		Total			15			11			12
New item	Bike Sharing	Use			7			5			5
		Total			18			14			15
New item	Scooter and moto leasing	Use			9			4			4
		Total			20			11			13
	An app provided by the company to book multiple mobility solutions	Use	5	6	12	10	10	11	11	10	11
		Total	14	17	22	20	20	21	22	21	23
New item	A card provided by the company to pay multiple mobility solution	Use			18			8			8
		Total			36			20			22

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

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 53% of the companies declare that the main reason for introducing mobility solutions is: Because of HR related needs like talent recruitment, retaining employees etc..



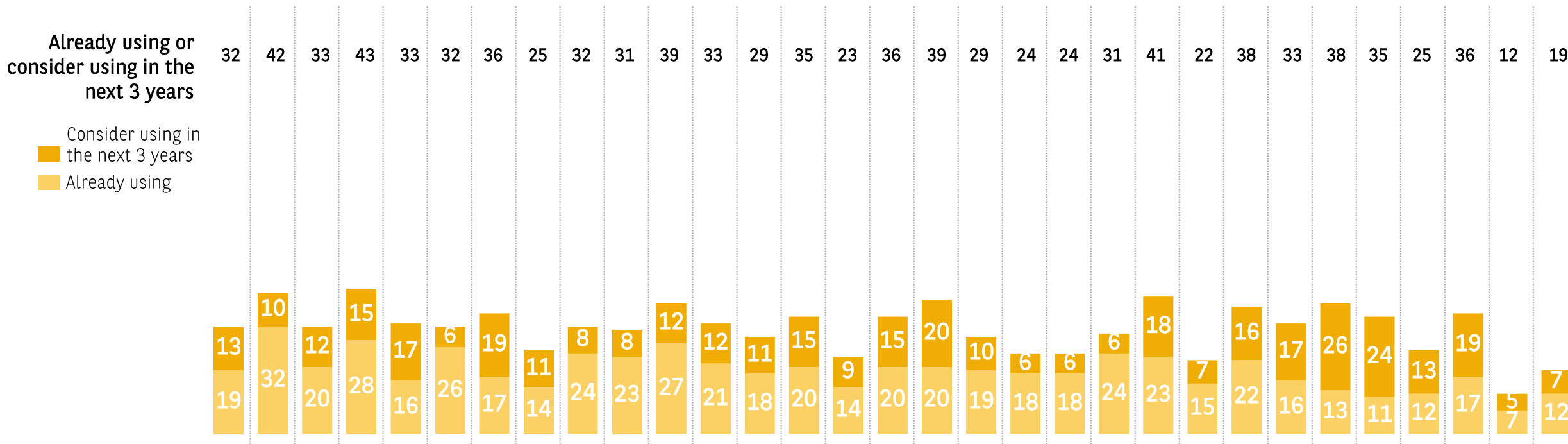
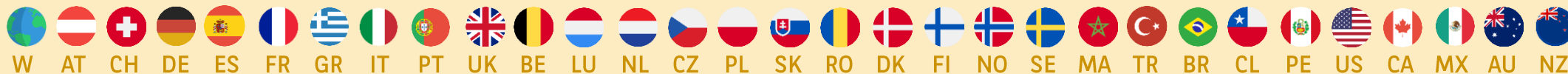
MM16. For what reasons has your company introduced, or does your company intend to introduce, these mobility solutions?
Basis: companies using or considering at least one mobility solution

PUBLIC TRANSPORT EXPENSE REIMBURSEMENT

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 12% 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?

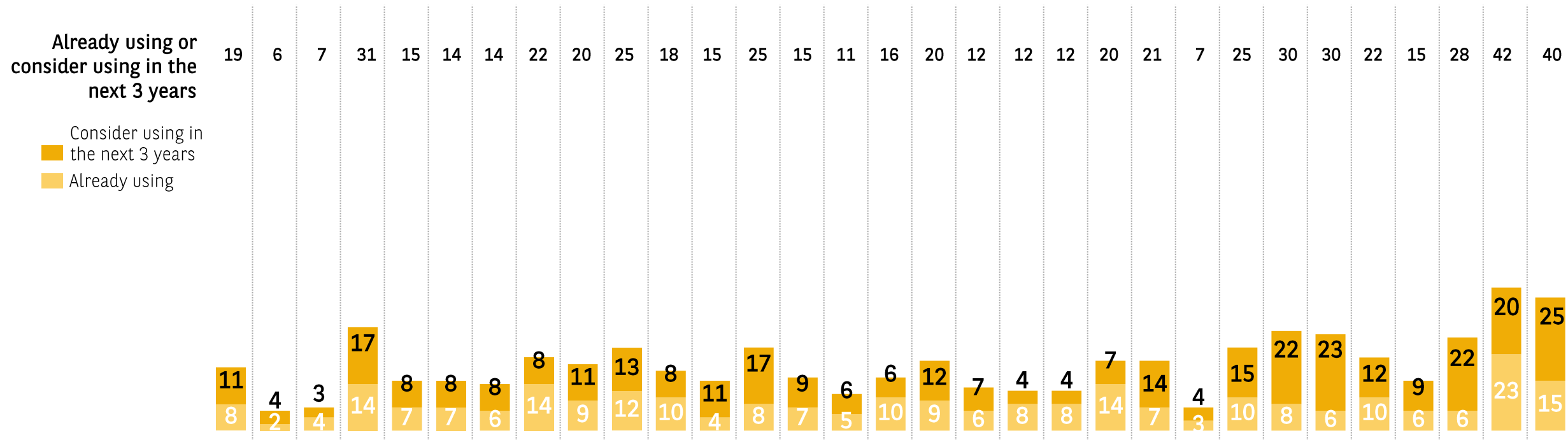
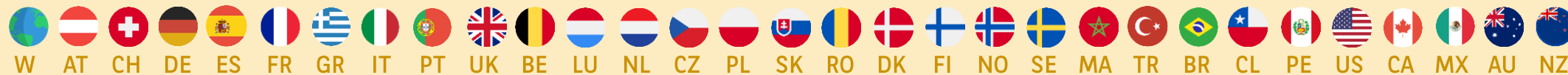
Basis: companies with corporate vehicles = 100%

PERSONAL VEHICLE EXPENSE REIMBURSEMENT

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 42% 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?

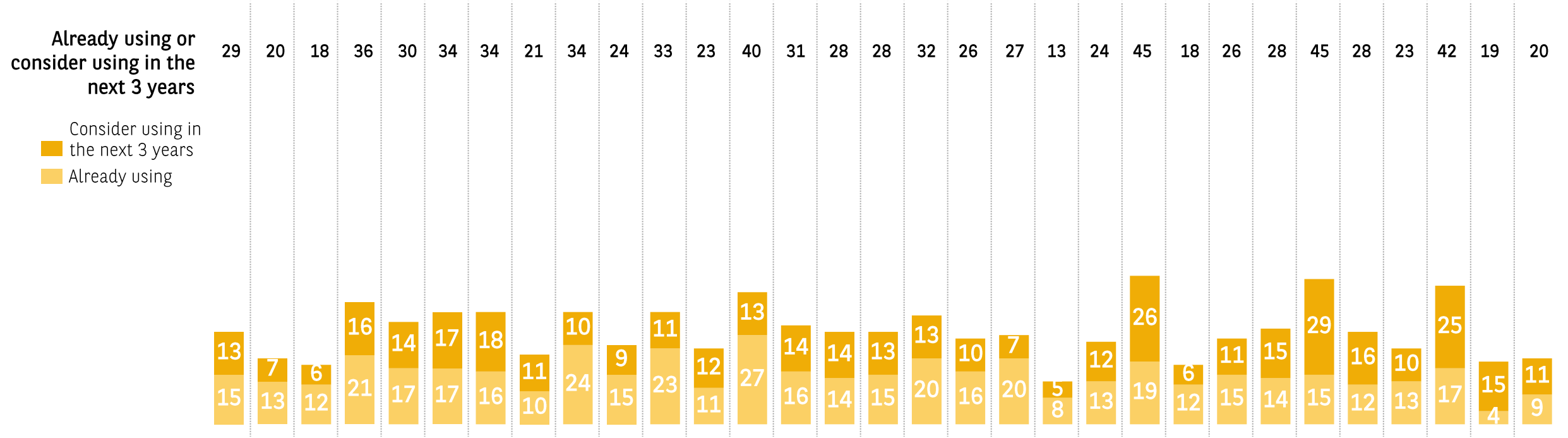
Basis: companies with corporate vehicles = 100%

MOBILITY BUDGET

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 19% of the companies are already using Mobility Budget or are considering doing so in the next 3 years.

IN %



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

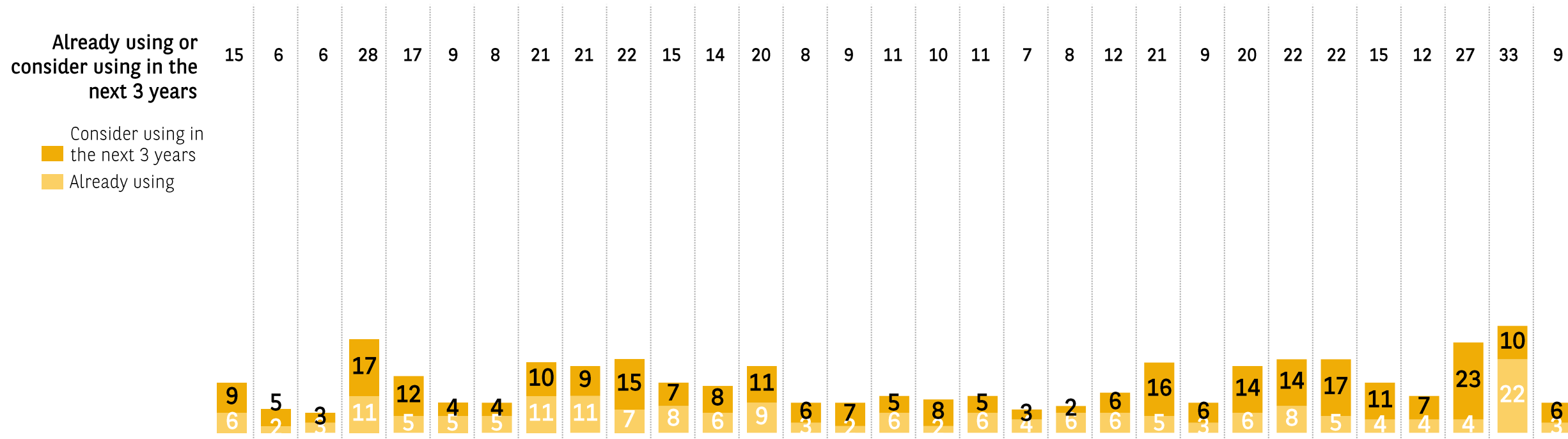
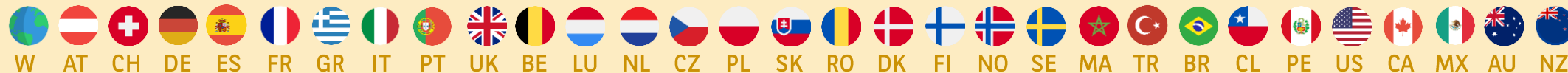
Basis: companies with corporate vehicles = 100%

PRIVATE LEASE OR SALARY SACRIFICE

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 33% of the companies are already using Private lease or salary sacrifice 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?

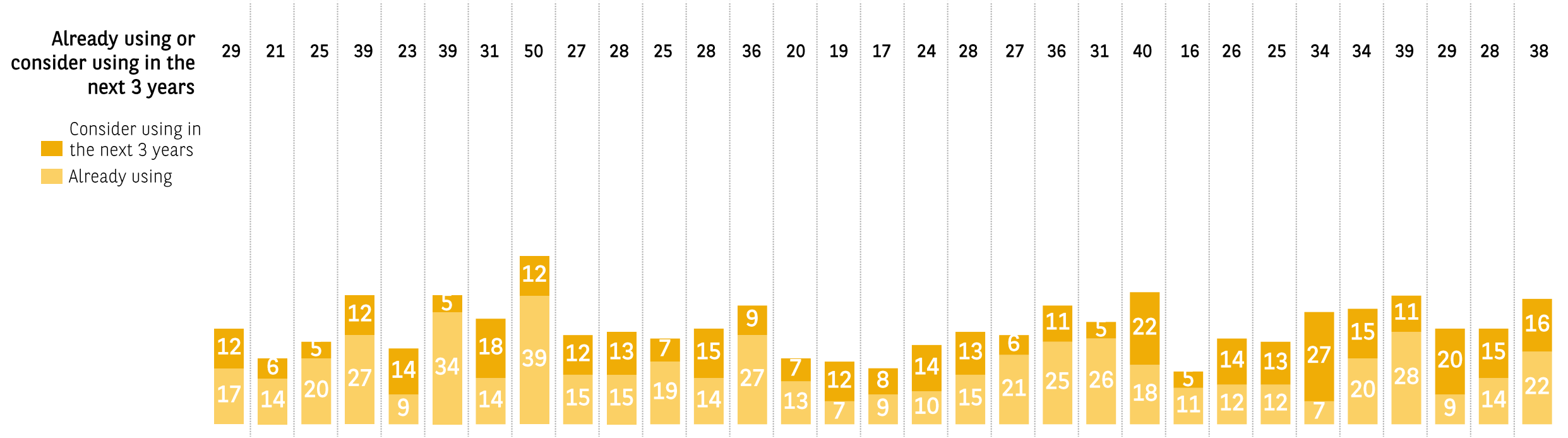
Basis: companies with corporate vehicles = 100%

SHORT OR MID TERM RENTAL VEHICLE

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 28% of the companies are already using short or mid term rental vehicle or are considering doing so in the next 3 years.

IN %



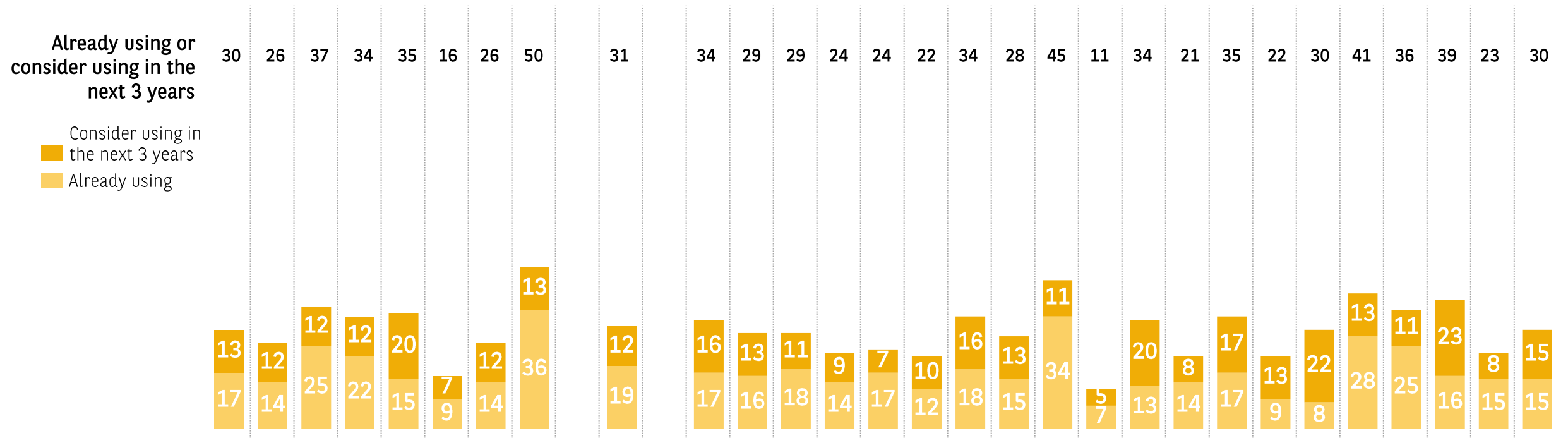
MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

CAR OR CASH ALLOWANCE

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 23% of the companies are already using Car or cash allowance or are considering doing so in the next 3 years.

IN %



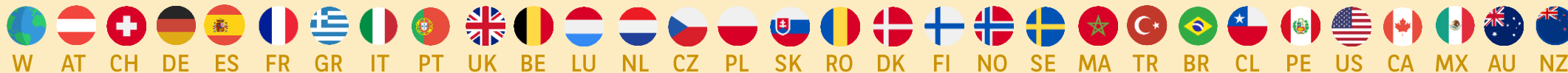
MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

CAR SHARING / POOLED VEHICLES

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 20% of the companies are already using Car sharing / pooled vehicles or are considering doing so in the next 3 years.

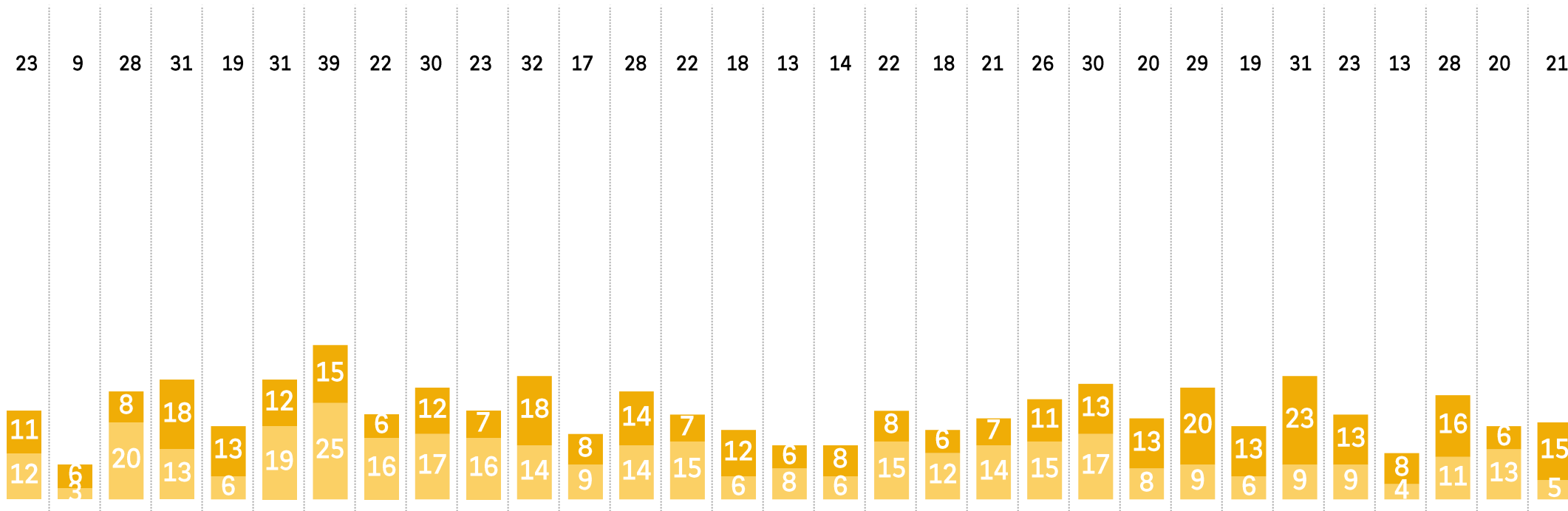
IN %



Already using or consider using in the next 3 years

Consider using in the next 3 years

Already using



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

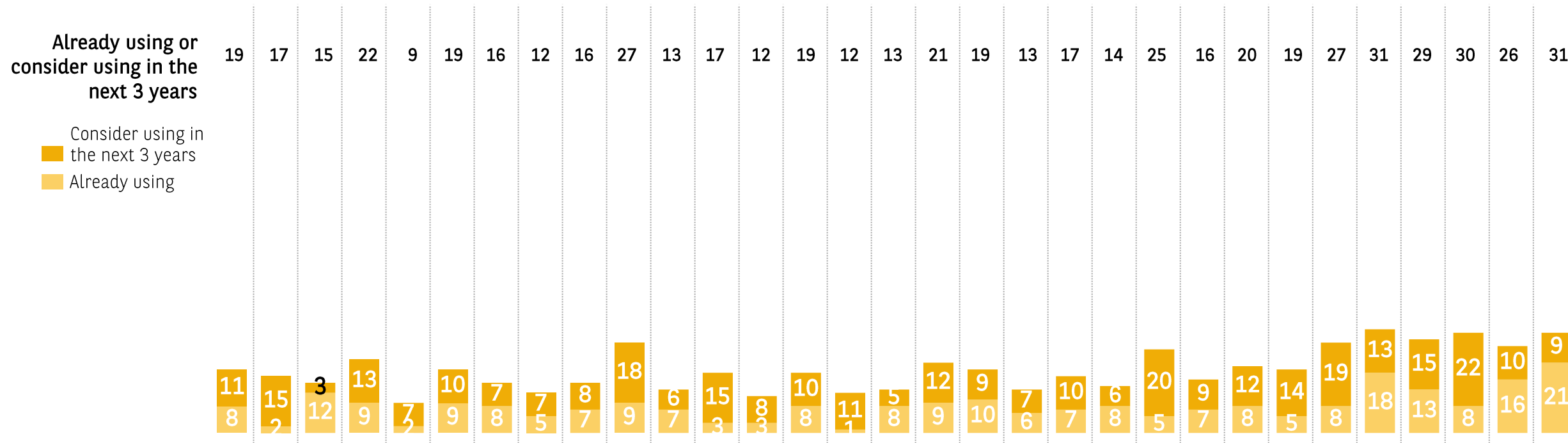
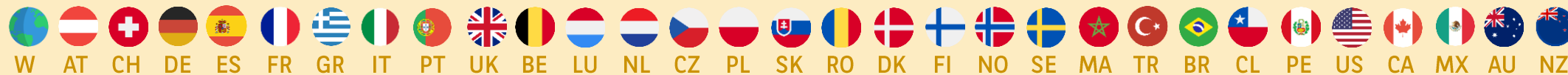
Basis: companies with corporate vehicles = 100%

RIDE SHARING / CARPOOLING

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 26% of the companies are already using Ride sharing / carpooling or are considering doing so in the next 3 years.

IN %



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

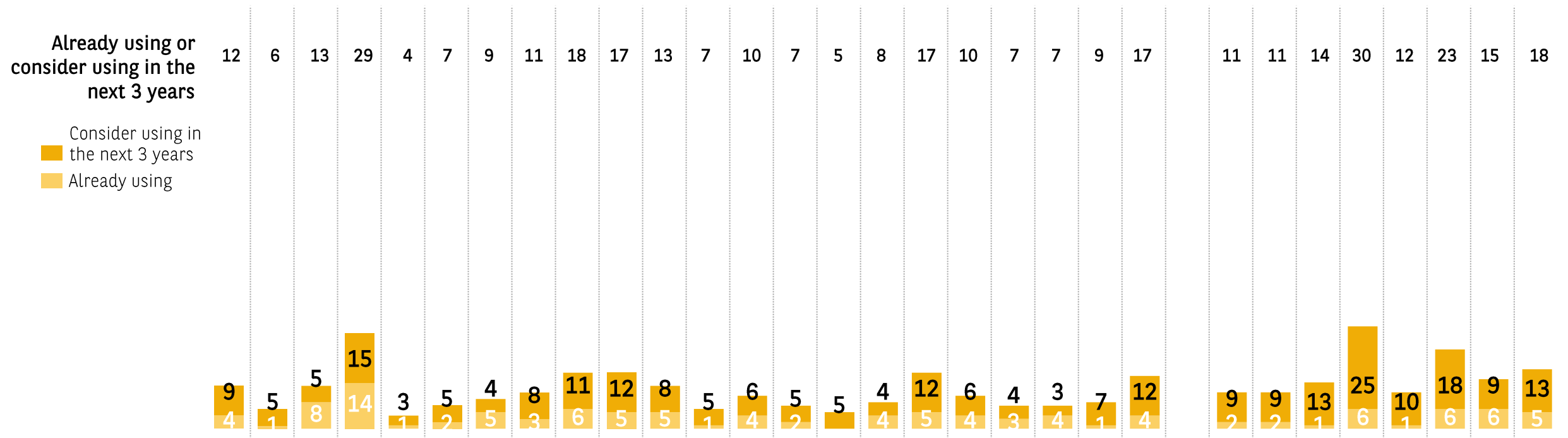
Basis: companies with corporate vehicles = 100%

BIKE LEASING

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 15% of the companies are already using Bike leasing or are considering doing so in the next 3 years.

IN %



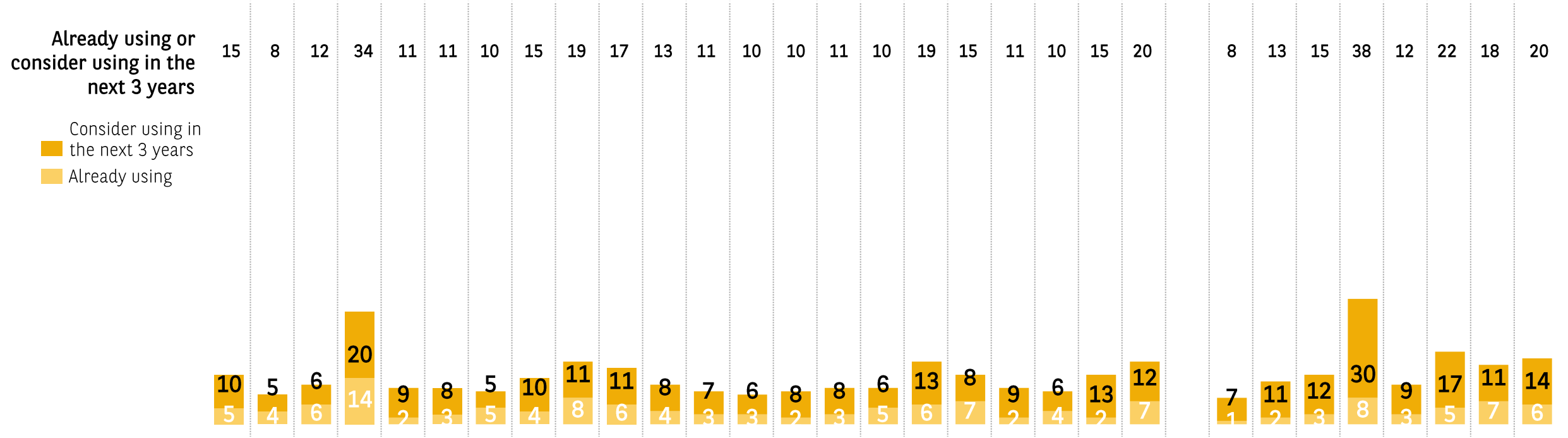
MM15. Which of the following mobility solutions have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

BIKE SHARING

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 18% of the companies are already using Bike sharing or are considering doing so in the next 3 years.

IN %



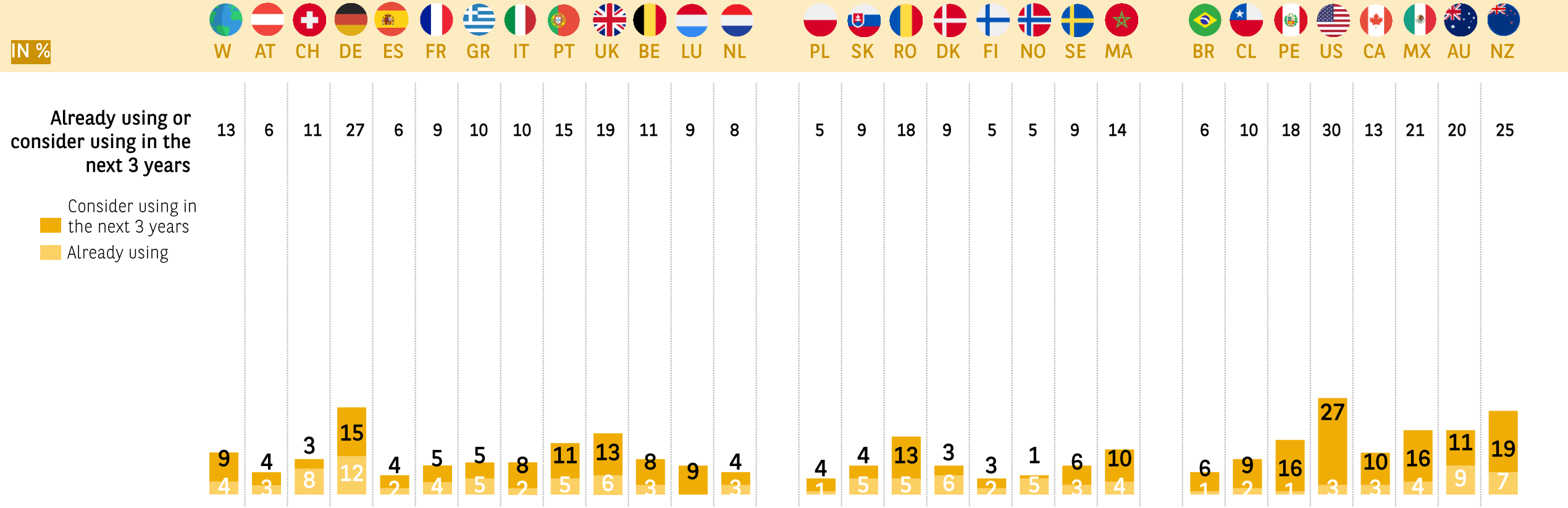
MM15. Which of the following mobility solutions have you implemented or are you considering implementing in the next 3 years?

Basis: companies with corporate vehicles = 100%

SCOOTER AND MOTO LEASING

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 20% of the companies are already using Scooter and moto leasing or are considering doing so in the next 3 years.



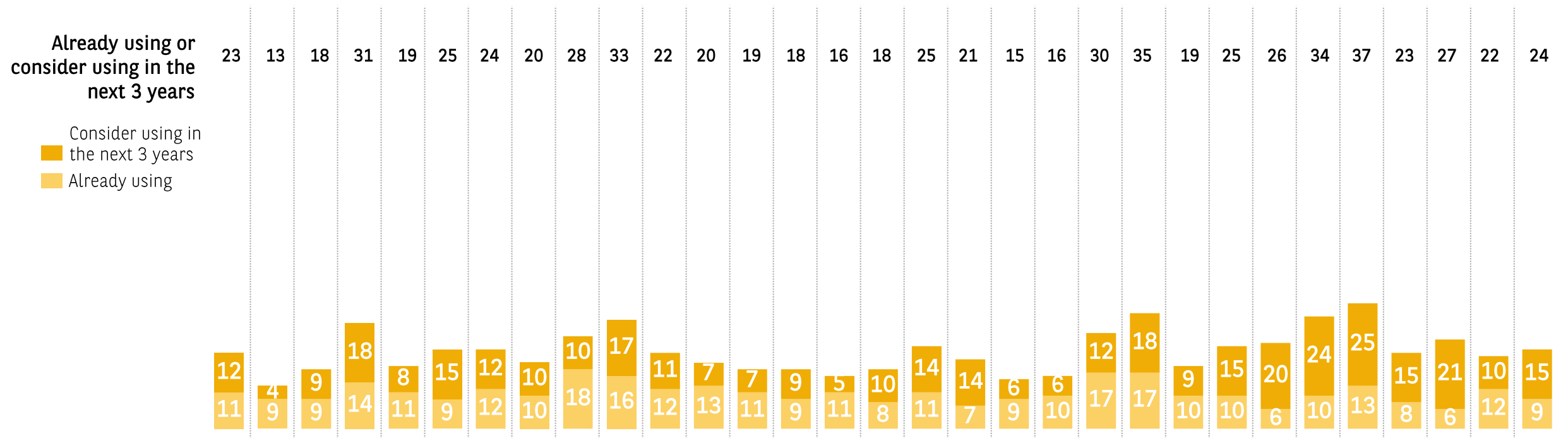
MM15. Which of the following mobility solutions have you implemented or are you considering implementing in the next 3 years?
 Basis: companies with corporate vehicles = 100%

AN APP PROVIDED BY THE COMPANY TO BOOK MULTIPLE MOBILITY SOLUTIONS

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 22% 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 %



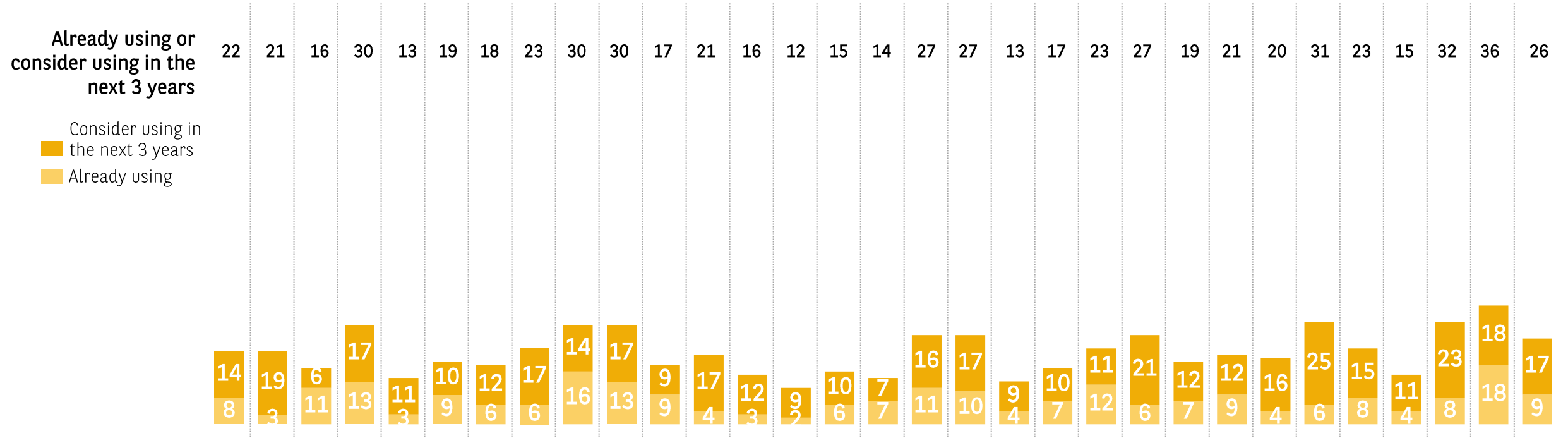
MM15. Which of the following mobility solutions have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

A CARD PROVIDED BY THE COMPANY TO PAY MULTIPLE MOBILITY SOLUTION

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 36% of the companies are already using A card provided by the company to pay multiple mobility solution or are considering doing so in the next 3 years.

IN %



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

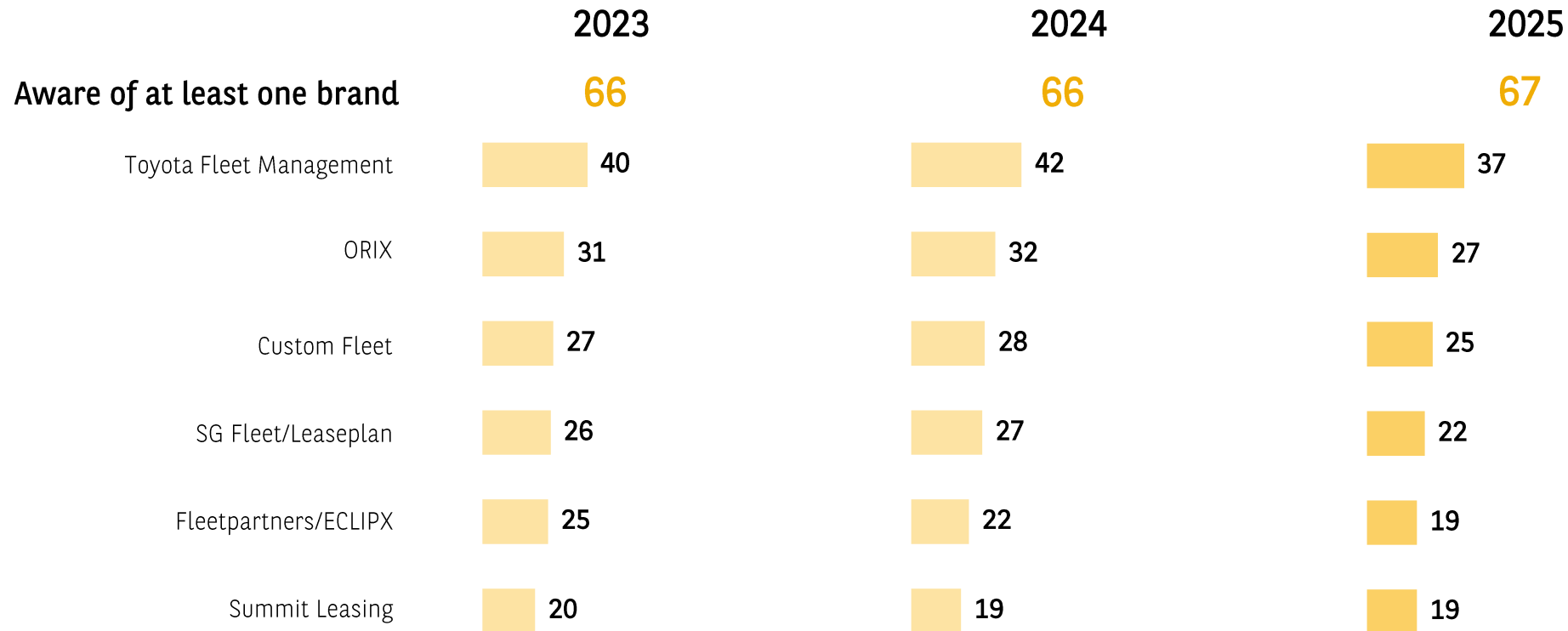
AWARENESS OF LEASING COMPANIES

HOW TO READ THE RESULTS ?

In 2025, 67% of the Australian companies surveyed are aware of a least one brand. Toyota Fleet Management is top 1 brand: known by 37% of the companies.

Local question

IN %



AT1. Which of the following leasing companies do you know, if only by name?
Basis: companies with corporate vehicles = 100%

X% Significantly higher/lower vs. previous wave

6

FUTURE CHALLENGES

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



Only a minority of Australian companies surveyed have set targeted decarbonization goals to date

17% of Australian companies surveyed have targeted decarbonization goals, but an additional **24%** are currently evaluating such goals, showing a growing awareness of corporate decarbonization – with rather consistent results across company sizes and with the European average.

A moderate weight of employee mobility: of those with decarbonization targets, **12%** consider employee mobility is a significant factor and 35% a moderate factor.

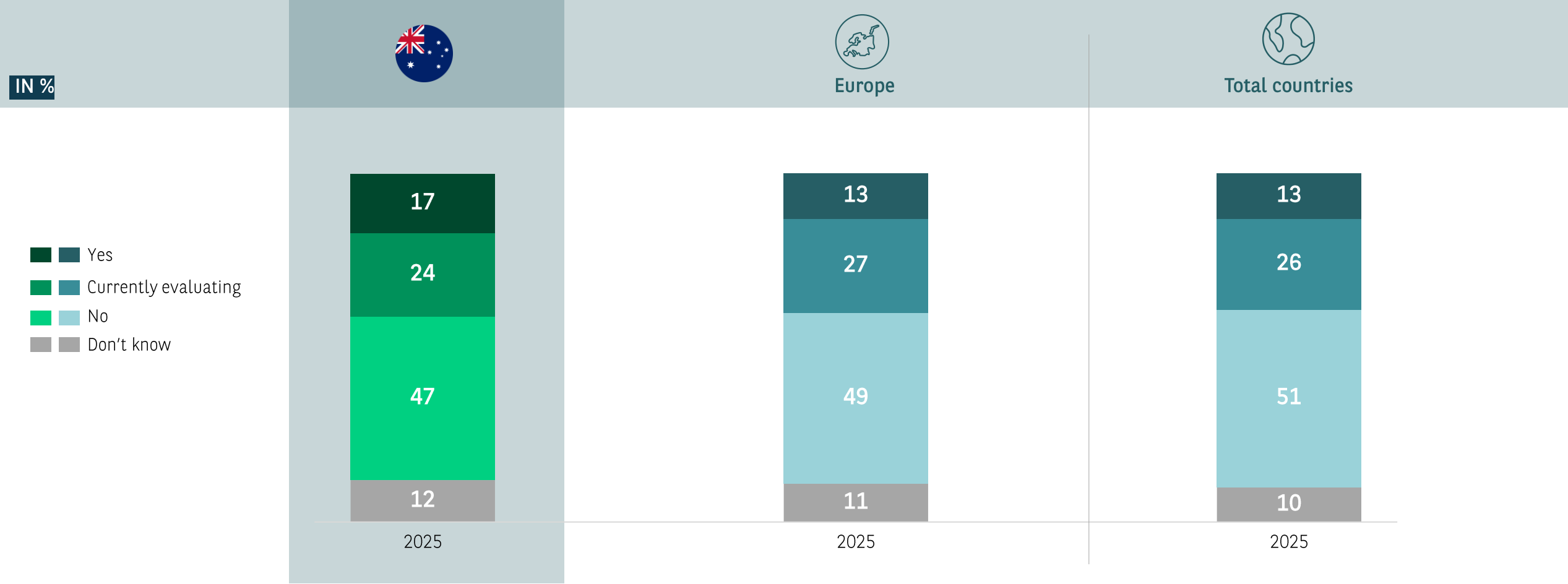
For Australian fleet managers, future fleet challenges focus on mitigating TCO increase and adaptation to restrictive public policies on ICE vehicles

Mitigating TCO increase (**60%**) and adaptation to restrictive public policies on ICE (**37%**) are the top 2 challenges for fleet managers. Managing longer vehicles' delivery time and adjusting to new ways of working dropped compared to 2024 (25% and 16%).

DECARBONIZATION GOALS

HOW TO READ THE RESULTS ?

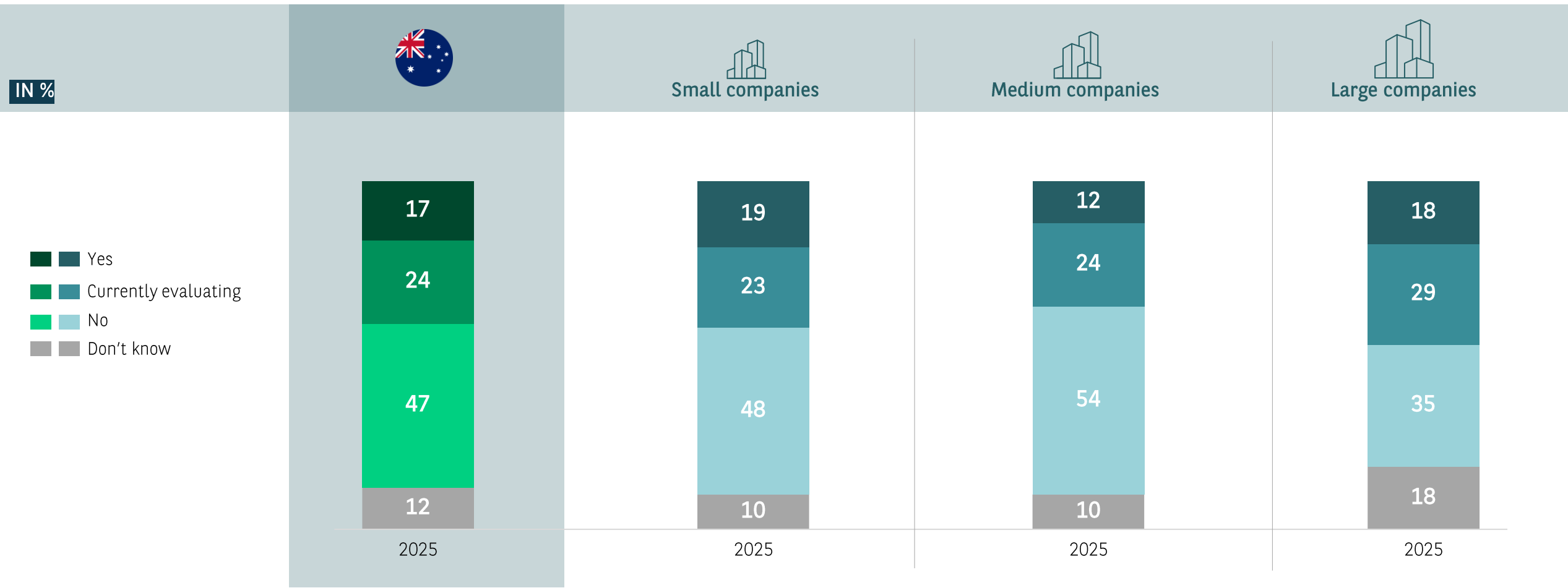
Among the Australian companies surveyed in 2025, 17% of the companies have targeted decarbonization goals.



A56. Does your organization have targeted decarbonization goals?
Basis: companies with corporate vehicles = 100%

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 17% of the companies have targeted decarbonization goals.



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

A56. Does your organization have targeted decarbonization goals?
Basis: companies with corporate vehicles = 100%

DECARBONIZATION GOALS

New question

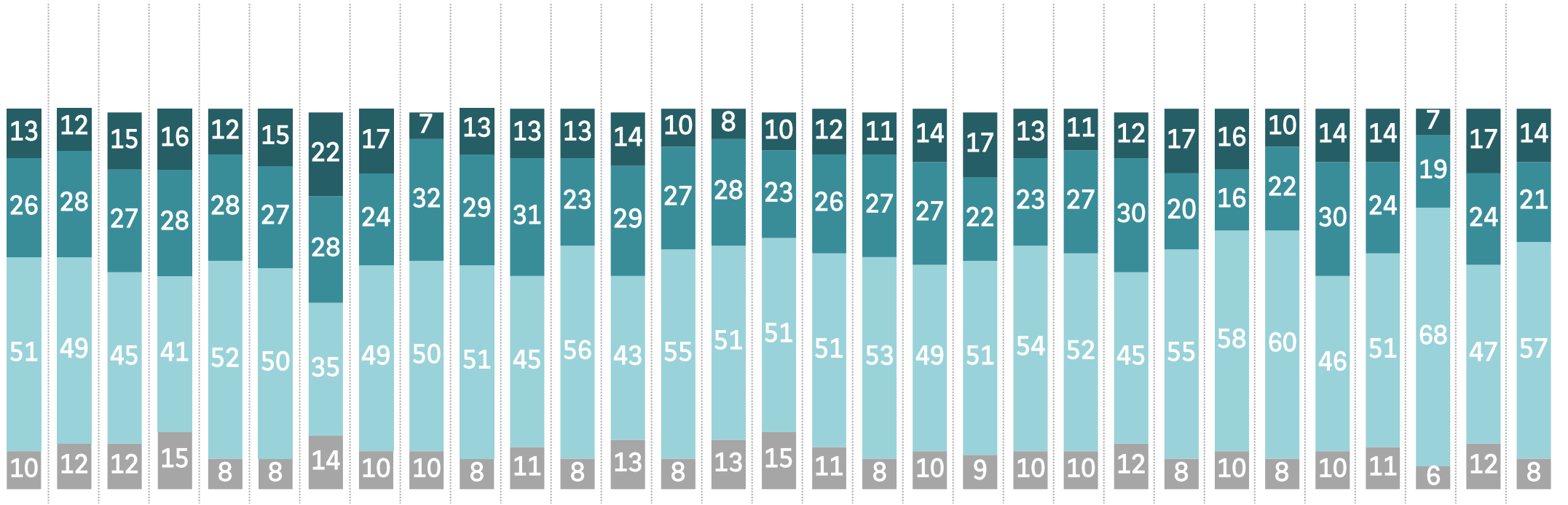
HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 17% of the companies have targeted decarbonization goals.

IN %



Yes
 Currently evaluating
 No
 Don't know

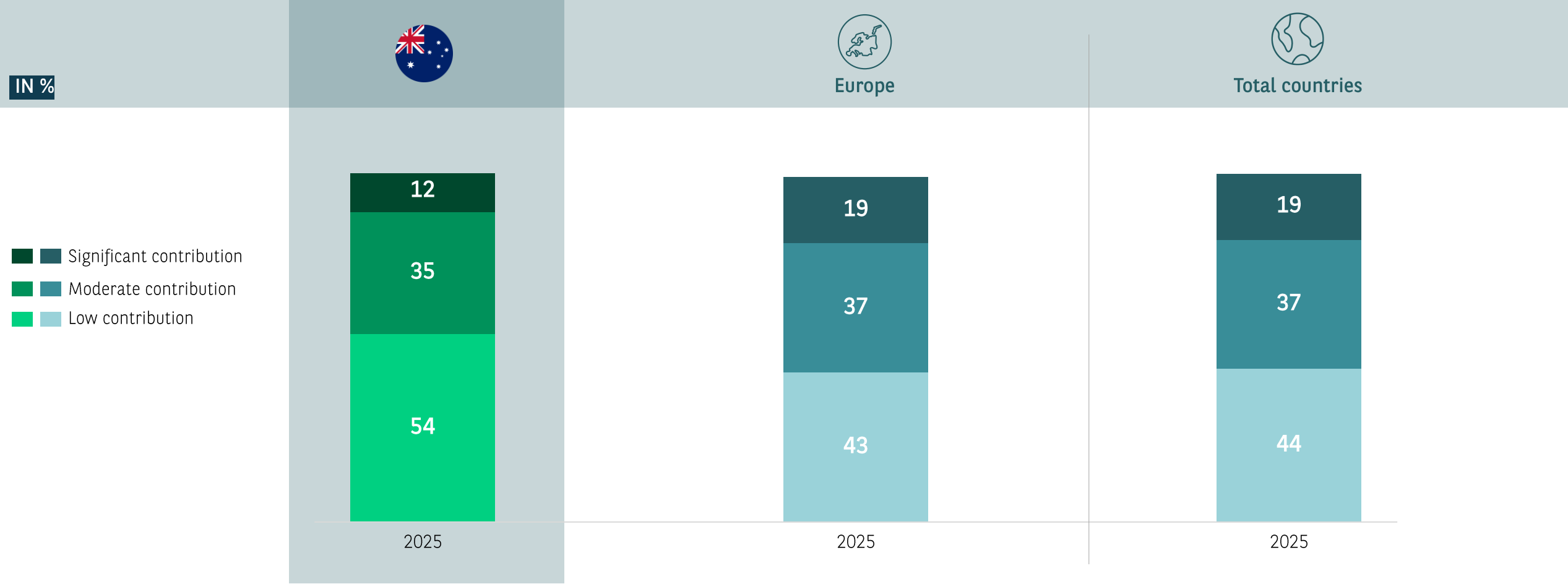


A56. Does your organization have targeted decarbonization goals?
 Basis: companies with corporate vehicles = 100%

IMPORTANCE OF EMPLOYEE'S MOBILITY TO DECARBONIZATION GOALS

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 12% 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

New question

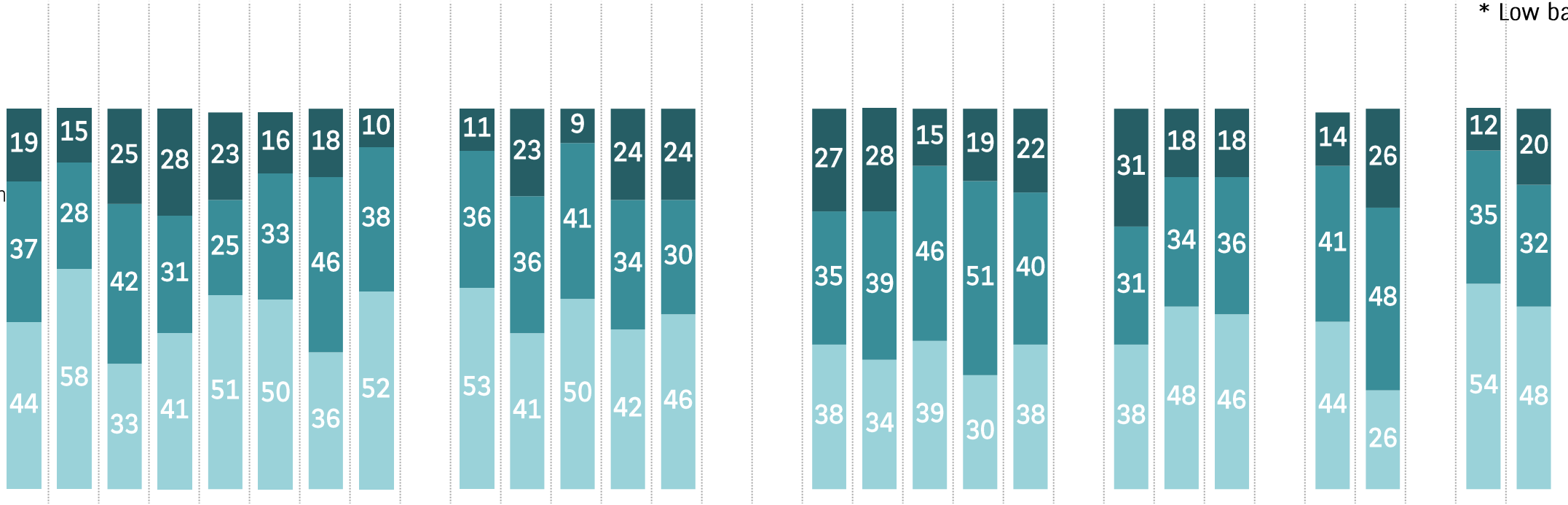
HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 12% 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



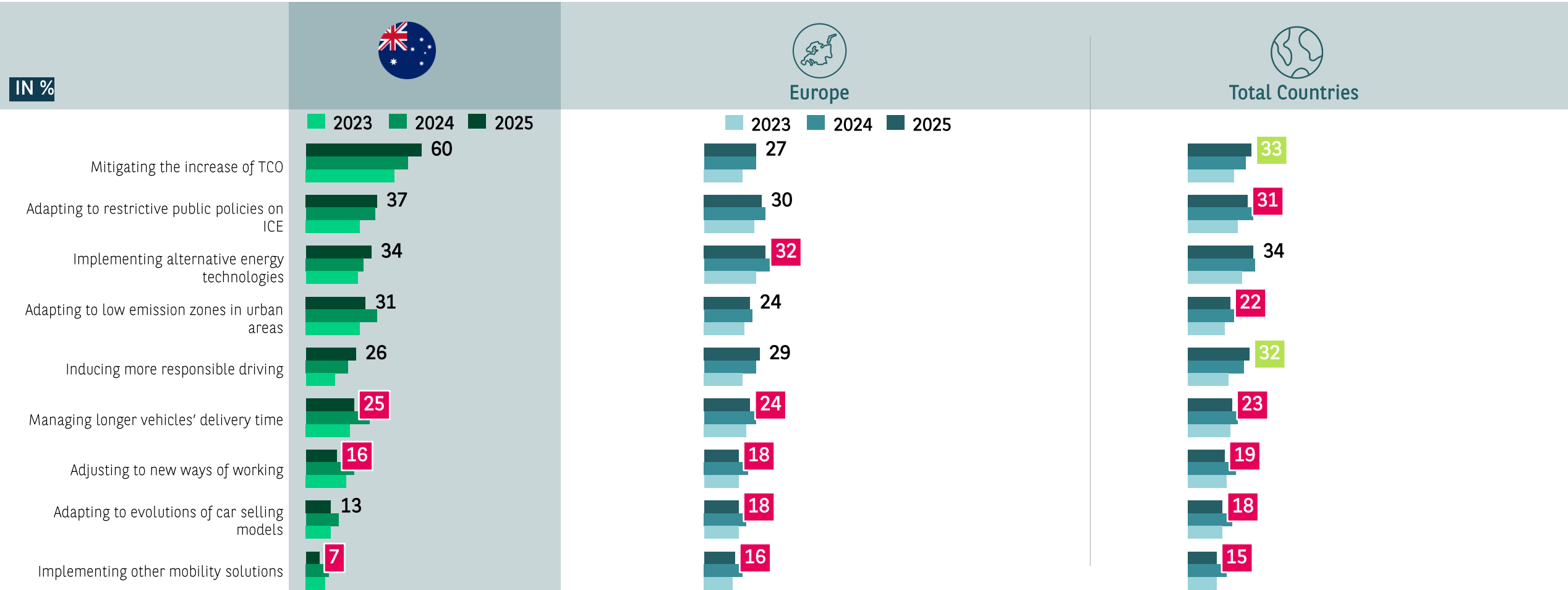
* Low basis

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 ?

Among the Australian companies surveyed in 2025, 60% of the companies declare that Mitigating the increase of TCO is top 1 challenge 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%

% Significantly higher/lower vs. previous wave

THREE MAIN CHALLENGES FOR FLEET MANAGEMENT IN THE N3Y

HOW TO READ THE RESULTS ?

Among the Australian companies surveyed in 2025, 60% of the companies declare that Mitigating the increase of TCO is top 1 challenge for fleet management in the next 3 years.

1st challenge
2nd challenge
3rd challenge



IN %

	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
Mitigating the increase of TCO	33	28	25	27	26	34	25	32	28	48	16	28	23	22	23	28	31	23	22	29	20	34	22	43	35	51	39	52	56	60	59
Adapting to restrictive public policies on ICE	31	28	28	35	24	42	24	31	37	32	43	32	30	25	22	29	40	29	30	22	28	31	30	41	41	31	31	25	34	37	31
Implementing alternative energy technologies	34	32	30	38	26	47	29	25	37	46	39	27	26	29	26	26	38	29	37	28	22	29	29	44	43	47	33	31	51	34	53
Adapting to low emission zones in urban areas	22	19	25	20	20	36	23	19	25	32	30	20	21	26	22	22	28	24	21	22	23	19	21	1	21	16	27	16	11	31	20
Inducing more responsible driving	32	23	19	42	32	41	25	27	28	39	36	33	24	24	25	22	27	30	21	25	27	26	23	52	44	54	44	35	42	26	40
Managing longer vehicles' delivery time	23	28	24	24	24	36	23	21	20	23	35	27	24	22	18	23	19	25	22	27	23	15	25	17	17	18	27	39	13	25	7
Adjusting to new ways of working	19	14	14	29	16	12	19	19	11	10	31	20	19	25	18	20	17	22	16	16	14	24	21	40	27	16	12	18	18	16	13
Adapting to evolutions of car selling models	18	20	21	19	19	11	23	20	12	13	20	18	21	17	19	17	15	17	26	15	21	18	19	31	26	10	13	16	16	13	17
Implementing other mobility solutions	15	13	11	23	16	19	19	15	16	9	19	16	11	17	18	13	15	23	22	19	15	18	12	8	30	14	7	12	10	7	5

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%

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

Alternative Energy 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)

Telematics

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

Mobility policies




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

Mobility solutions

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

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
 Small companies	Less than 99 empl.	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
	100 - 249 empl.	●				●					●				●		●	●	●	●	●	●		●	●			●	●	●
 Medium companies	100 - 499 empl.	●		●				●		●		●	●	●		●							●					●		
	100 - 999 empl.		●		●		●		●																		●			
	250 empl. or more	●				●					●				●		●	●	●	●	●	●	●		●	●		●	●	●
 Large companies	500 empl. or more		●		●			●		●		●	●	●		●							●					●		
	1000 empl. or more			●		●		●		●																	●			

THANK YOU

