

FLEET AND MOBILITY BAROMETER 2026

COUNTRY REPORT 

1 FLEET CHARACTERISTICS

2 FINANCING METHODS

3 ENERGY MIX

4 CONNECTED FLEETS

5 EMPLOYEE MOBILITY

6 FUTURE CHALLENGES

RESEARCH APPROACH

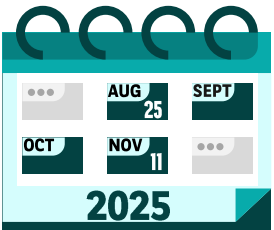


10,157

INTERVIEWS WITH
CORPORATE FLEET
DECISION MAKERS

20-MINUTE
PHONE INTERVIEWS

FIELDWORK
(ALL COUNTRIES)



READING NOTES ABOUT THE REPORT

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

RESEARCH OBJECTIVES

1



What short term shifts
are shaping the market?

2



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

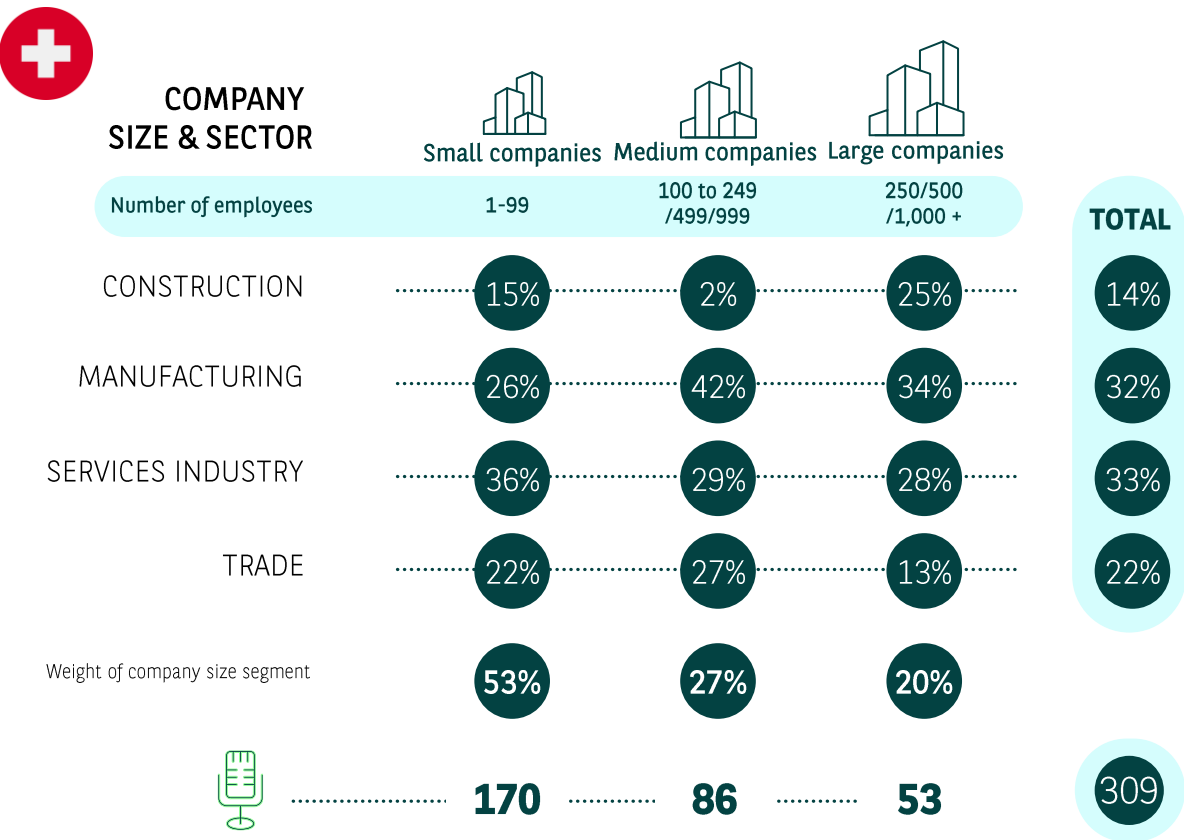
3



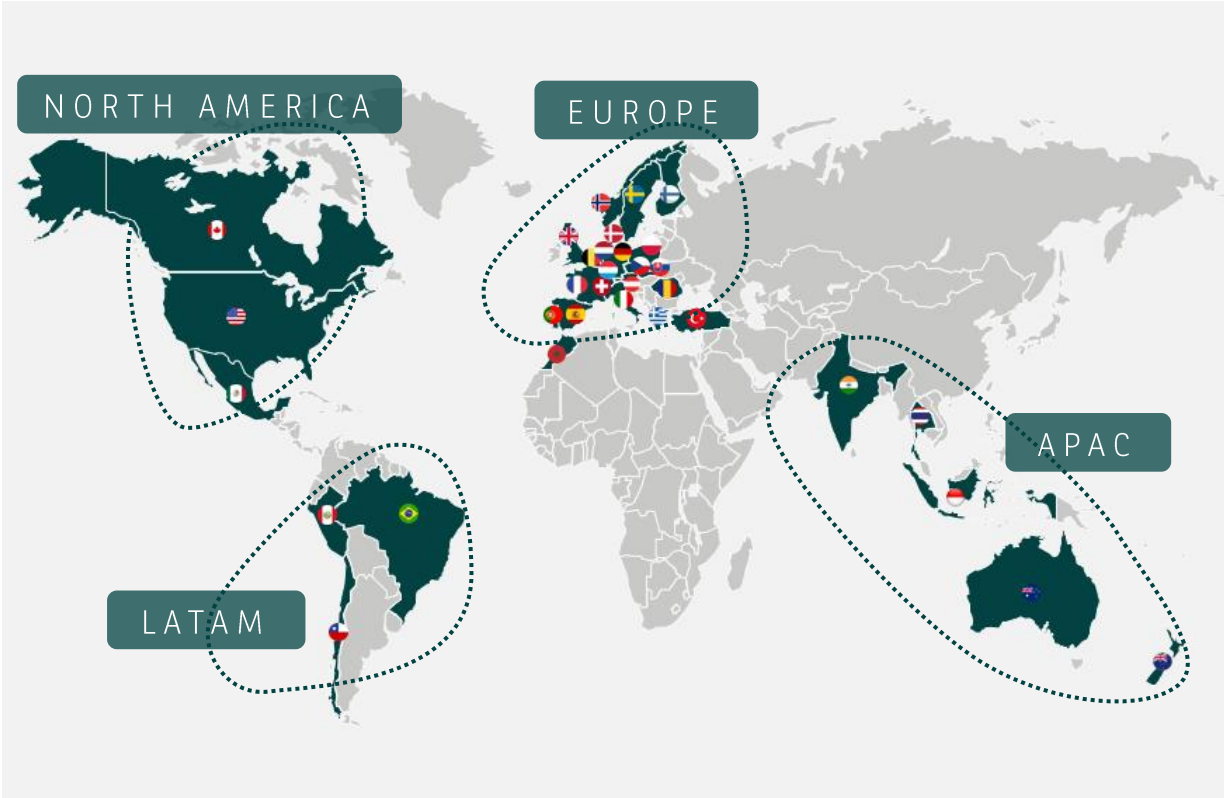
How do mobility solutions
impact corporate mobility?



QUOTAS ON COMPANY SIZE & INDUSTRY



33 COUNTRIES -4 REGIONAL BENCHMARKS



Morocco and Turkey: compared with Europe benchmark



MOST SWISS COMPANIES REMAIN CONFIDENT ABOUT THEIR FLEET PROSPECTS

92% anticipate their fleet will either remain stable or grow in the next 3 years (with 13% expecting growth) **29%** include second-hand vehicles in their fleets, lower than the European average of 41%. **52%** are considering it



POTENTIAL GROWTH AHEAD FOR OPERATIONAL/FULL-SERVICE LEASING

17% intend to introduce or increase their use of operational/full-service leasing to finance their fleet – still below the European average **27%** quote operational/full-service leasing as the main financing method for their fleet. A stable figure



FLEET ELECTRIFICATION REMAINS STABLE

54% already use electrified passenger cars, aligning with the European average and stable vs. 2025, while **27%** are considering it (higher than the European average) **43%** of fleet managers claim they would take all necessary measures to comply if regulations required an exclusive switch of passenger cars to BEVs by 2030, while **48%** would offer a mobility budget instead of a company car



STABLE TELEMATICS UPTAKE, WITH SOME PROMISING OPPORTUNITIES FOR EXPANDED USE

28% have adopted telematics, one of the lowest rate among the European countries analyzed. Large companies are the least equipped (15%) Only **15%** of them use telematics data. However, the potential remains significant, with **39%** of companies considering leveraging this data.



SWISS COMPANIES CONTINUE TO SUPPORT MOBILITY POLICIES AND SOLUTIONS, GUIDED BY CSR PRIORITIES AND HR NEEDS

37% have implemented public transport reimbursement. **38%** are implementing or considering car or cash allowance, compared to the European average of 29%. **44%** cite CSR considerations as their main motivation for developing corporate mobility, while **41%** point to HR related needs



DECARBONIZATION AND INNOVATION LEAD FLEET MANAGEMENT PRIORITIES

16% have set targeted decarbonization goals to date (**27%** currently evaluating such goals), electrification, adapting to ICE policies and managing longer vehicle delivery times being on top of the agenda **47%** are spontaneously eager for innovative solutions that enhance fleet performance management

01

FLEET CHARACTERISTICS

What are the key characteristics of fleets?



Swiss companies remain confident about the future of their fleets for 2026

92% of Swiss companies expect their fleet size to remain stable or grow over the next three years, with 13% anticipating growth.

Notably, the share of companies anticipating growth is now below the European average of 22%, following an 8-point decrease since 2024, when it was 21%.

The share of companies expecting their fleet size to remain stable is higher than the European average (78% vs. 68%).

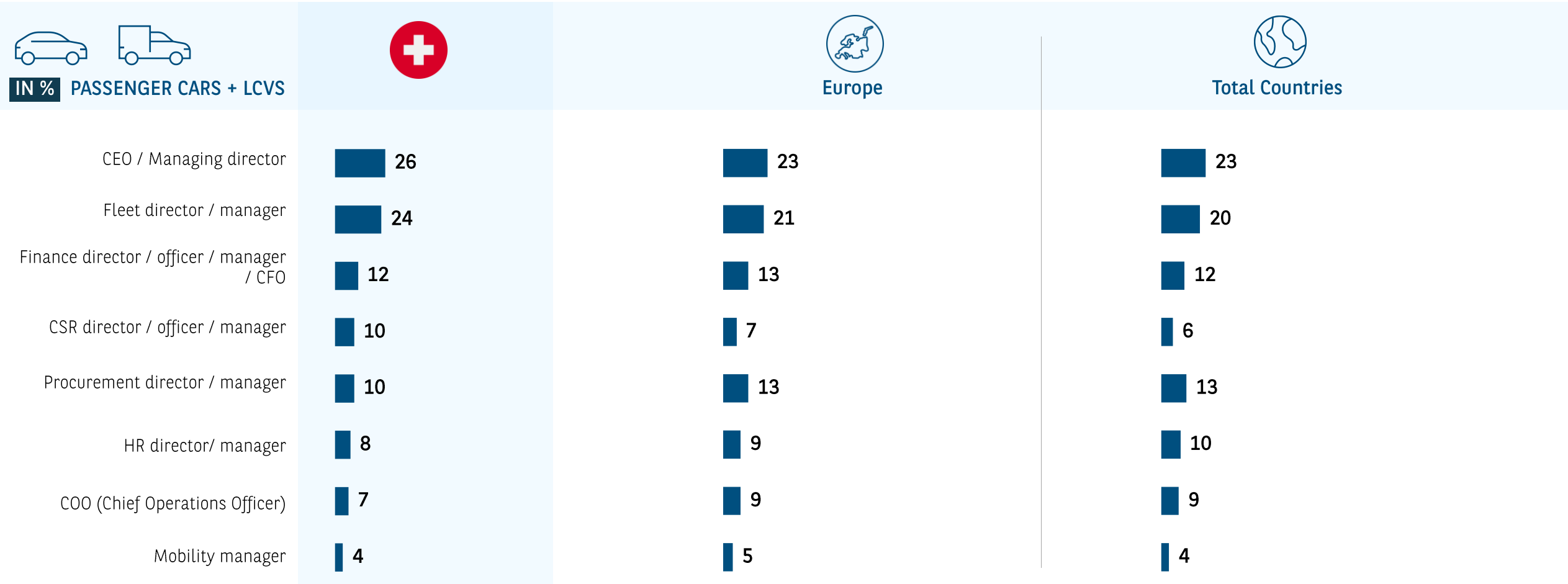
The share of Swiss companies using or considering second-hand vehicles remains significant

In 2026, 29% of companies in Switzerland already include second-hand vehicles in their fleets, stable below the European level of 41%. Additionally, 52% are considering incorporating second-hand vehicles within the next three years.

The use of second-hand vehicles is greater in large companies (41%) than in small companies (31%) and medium-sized ones (16%).

HOW TO READ THE RESULTS ?

In Switzerland, 26% of the respondents are CEO / Managing director.



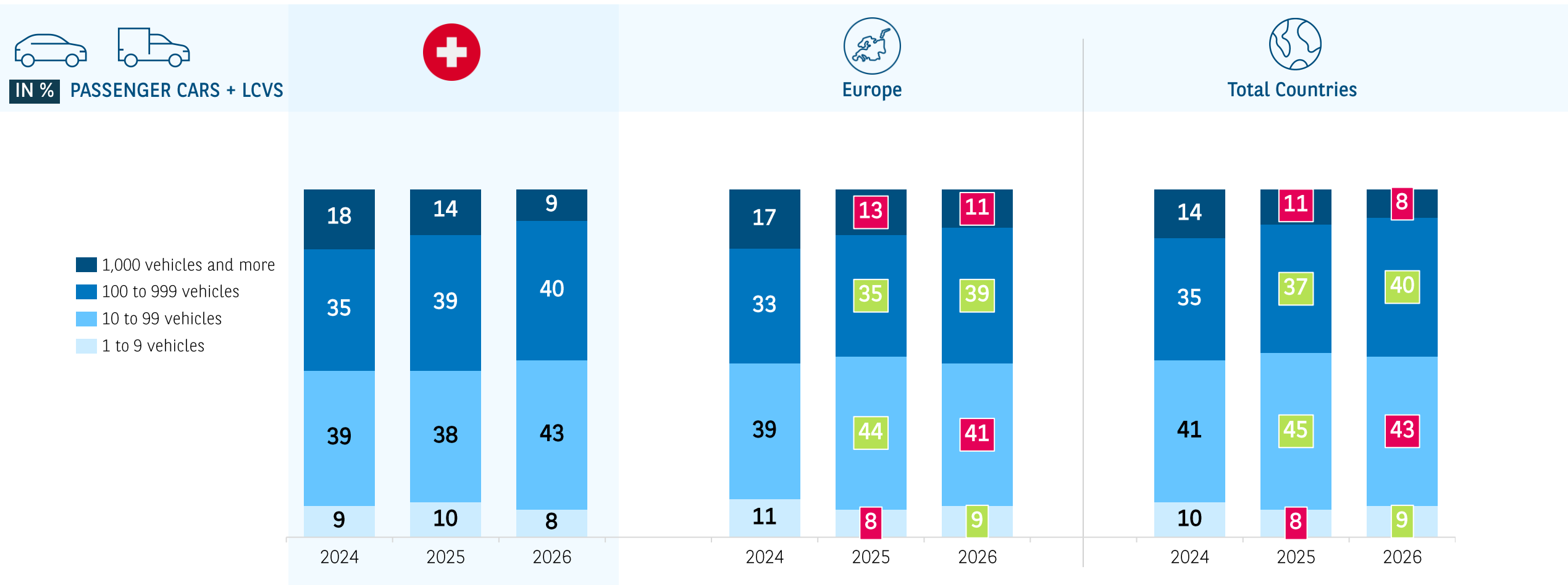
SC5TER. Could you please specify your exact position in the company?

Basis: companies with corporate vehicles = 100%

NUMBER OF VEHICLES IN FLEETS

HOW TO READ THE RESULTS ?

In Switzerland in 2026, vehicle fleets are composed of: 8% with 1-9 vehicles, 43% with 10-99 vehicles, 40% with 100-999 vehicles and 9% with 1,000 or more.



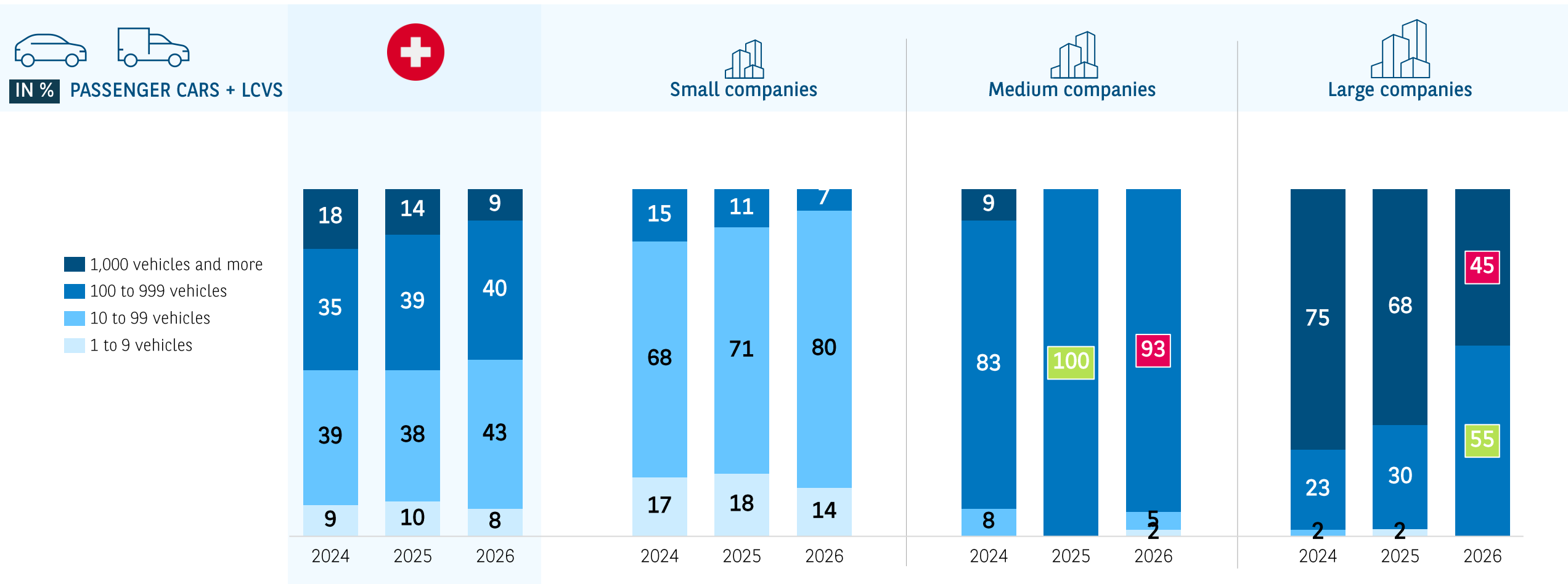
A5/ZDA5. Can you please tell us the total number of vehicles of less than 3.5 tons in your fleet?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

NUMBER OF VEHICLES IN FLEETS

HOW TO READ THE RESULTS ?

In Switzerland in 2026, vehicle fleets are composed of: 8% with 1-9 vehicles, 43% with 10-99 vehicles, 40% with 100-999 vehicles and 9% 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 Switzerland in 2026, passenger car fleets are composed of: 41% with 1-9 vehicles, 23% with 10-99 vehicles, 35% with 100-999 vehicles and 0% with 1000 or more. And LCV fleets are composed of: 22% with 1-9 vehicles, 33% with 10-99 vehicles, 43% with 100-999 vehicles and 3% with 1,000 or more.



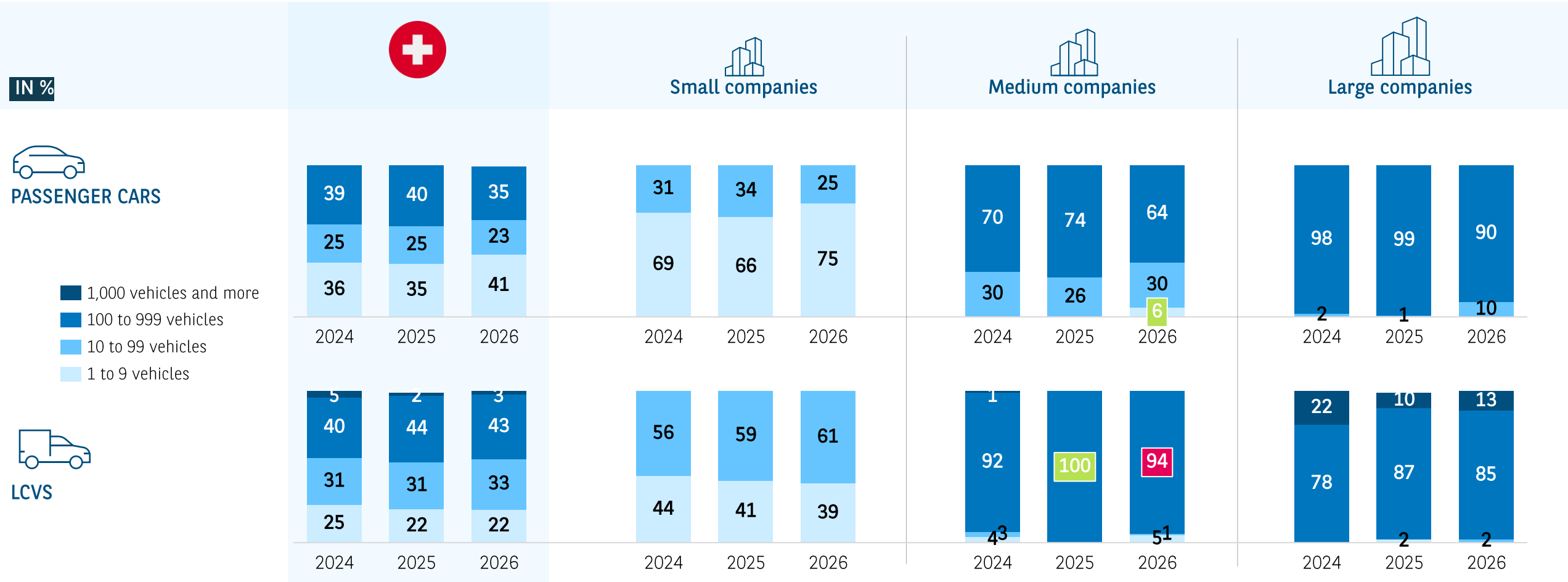
A5F. Can you please tell us the total number of cars and then the number of LCV's or vans in your fleet?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

NUMBER OF PASSENGER CARS AND LCVs IN FLEETS

HOW TO READ THE RESULTS ?

In Switzerland in 2026, passenger car fleets are composed of: 41% with 1-9 vehicles, 23% with 10-99 vehicles, 35% with 100-999 vehicles and 0% with 1000 or more. And LCV fleets are composed of: 22% with 1-9 vehicles, 33% with 10-99 vehicles, 43% with 100-999 vehicles and 3% with 1,000 or more.

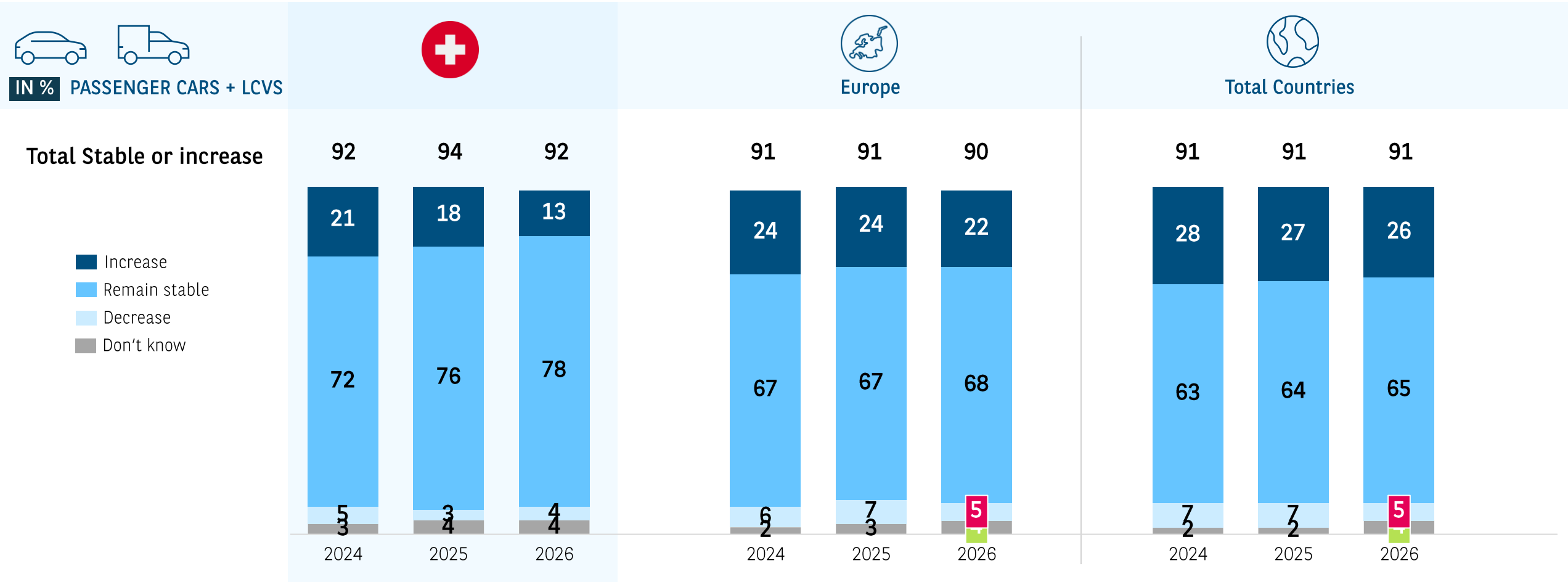


A5F. Can you please tell us the total number of cars and then the number of LCV's or vans in your fleet?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 92% of the companies expect their fleet to remain stable or to increase in the next 3 years.

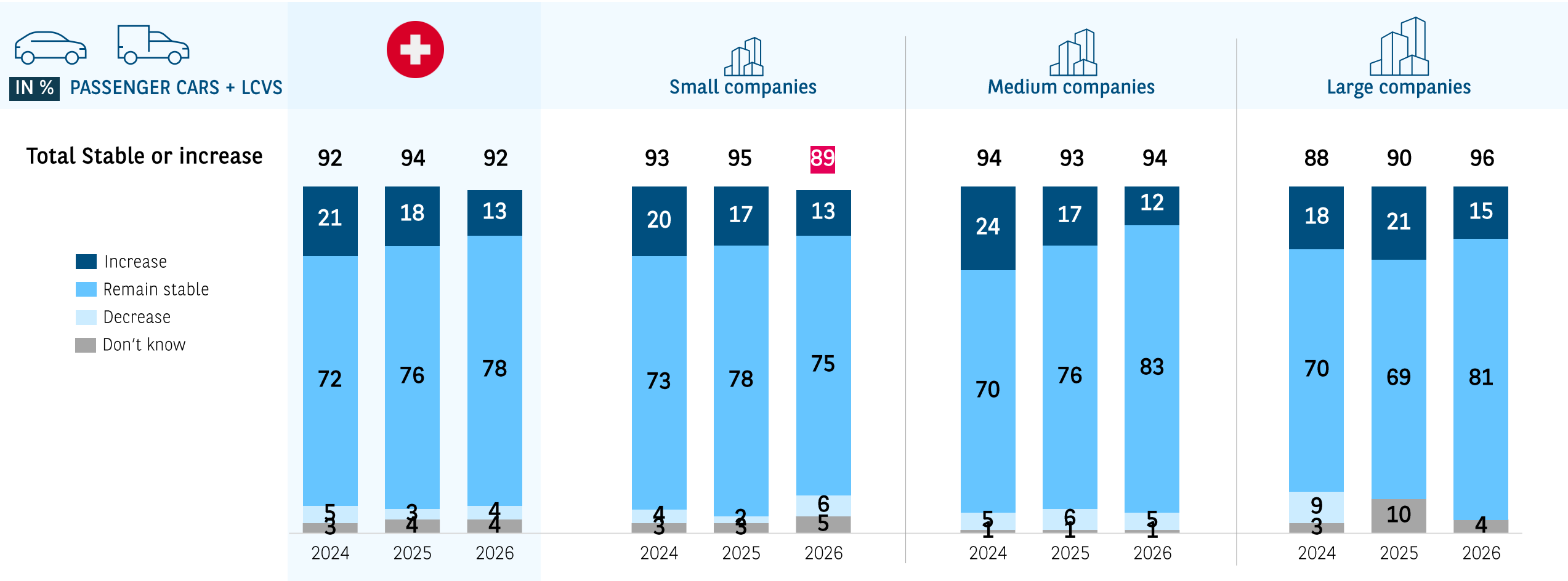


A8. In the next three years, do you think that the total number of vehicles in your company fleet will increase, decrease or remain the same?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 92% of the companies expect their fleet to remain stable or to increase in the next 3 years.

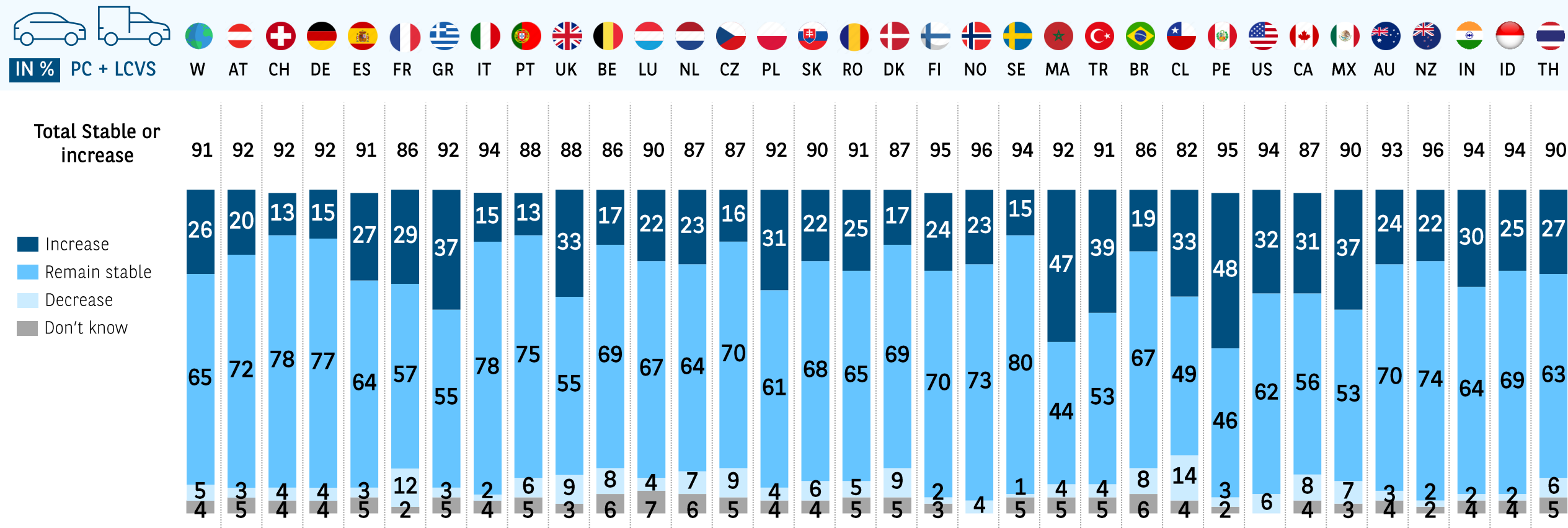


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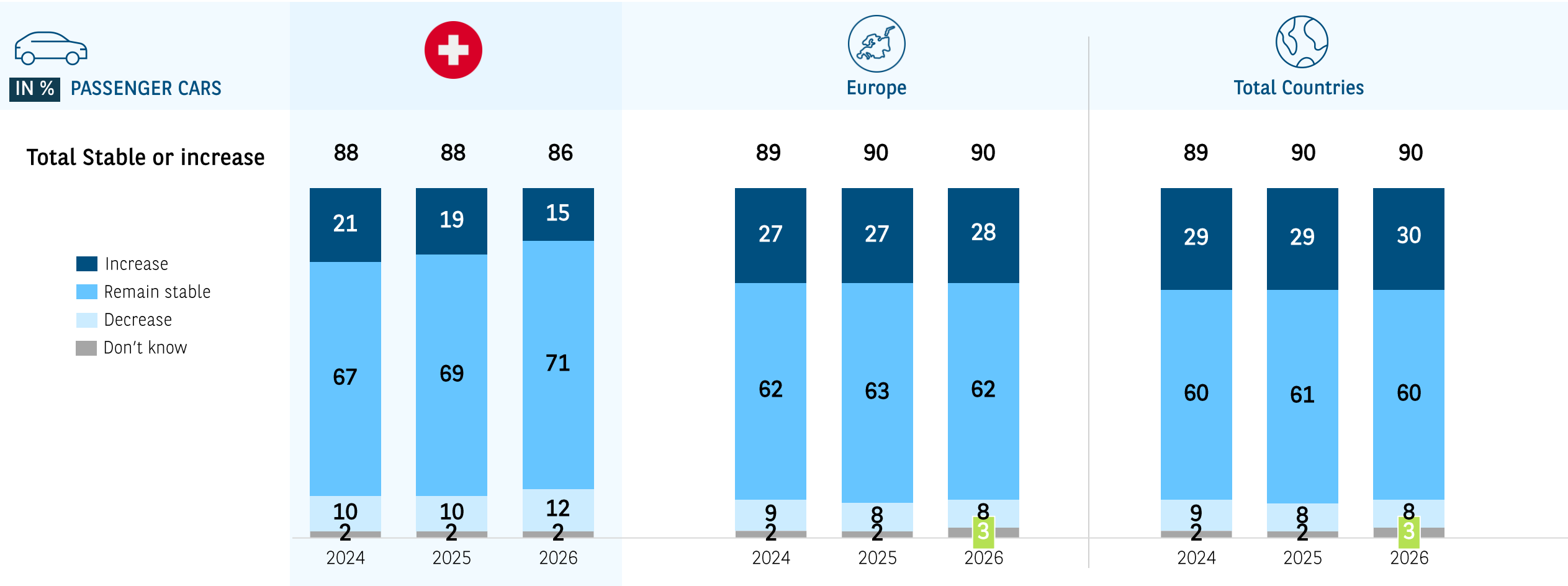


A8. In the next three years, do you think that the total number of vehicles in your company fleet will increase, decrease or remain the same?
Basis: companies with corporate vehicles = 100%

PASSENGER CAR FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 86% of the companies expect their passenger car fleet to remain stable or to increase in the next 3 years.



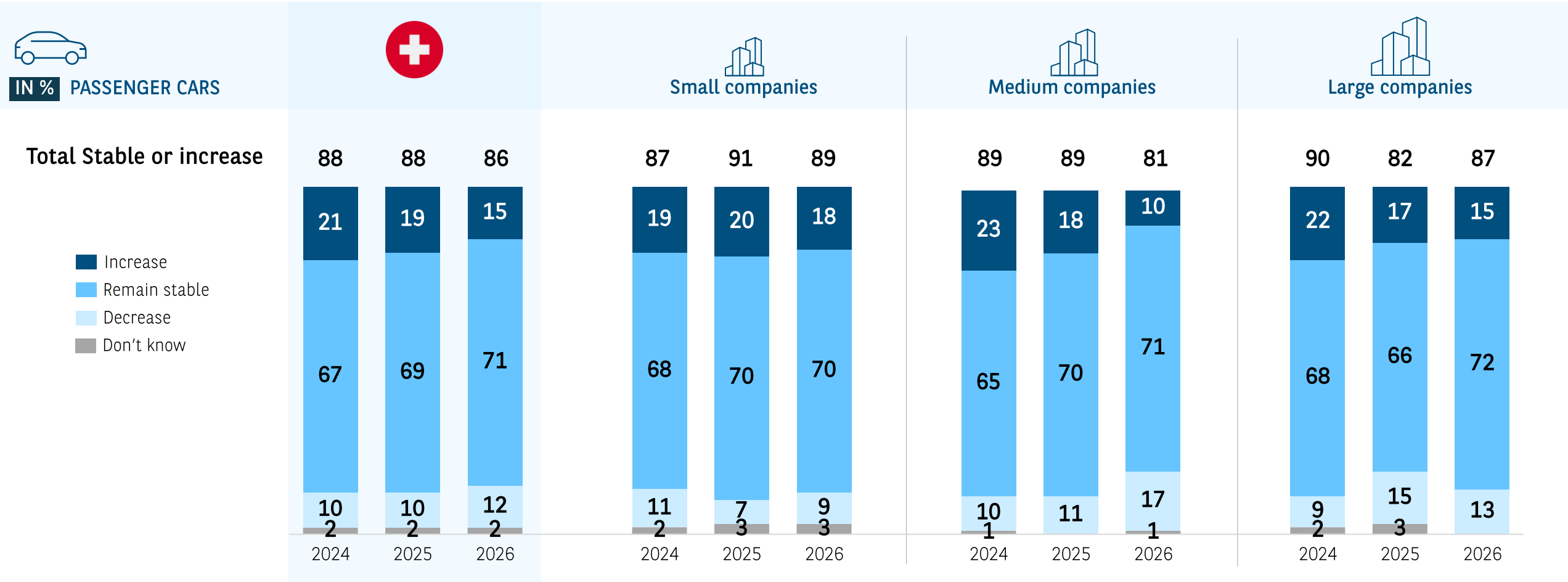
A9. In the next three years, do you think that the total number of your passenger cars will...?
Basis: companies with passenger cars

X% Significantly higher / lower vs. previous wave

PASSENGER CAR FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 86% 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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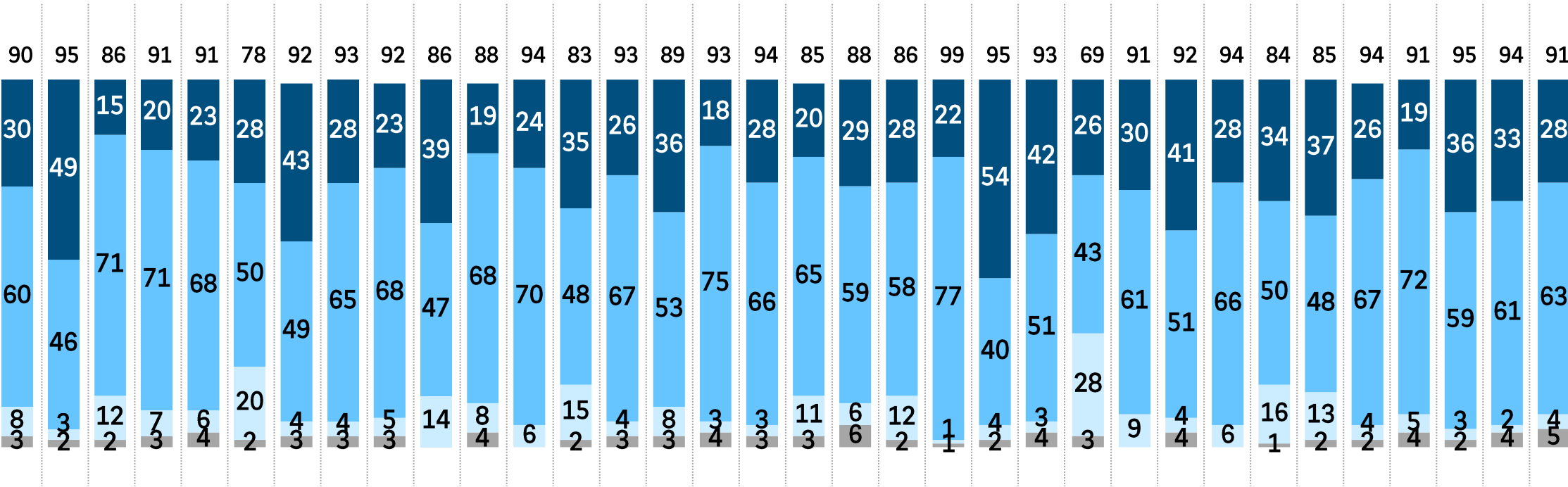


IN % PC



Total Stable or increase

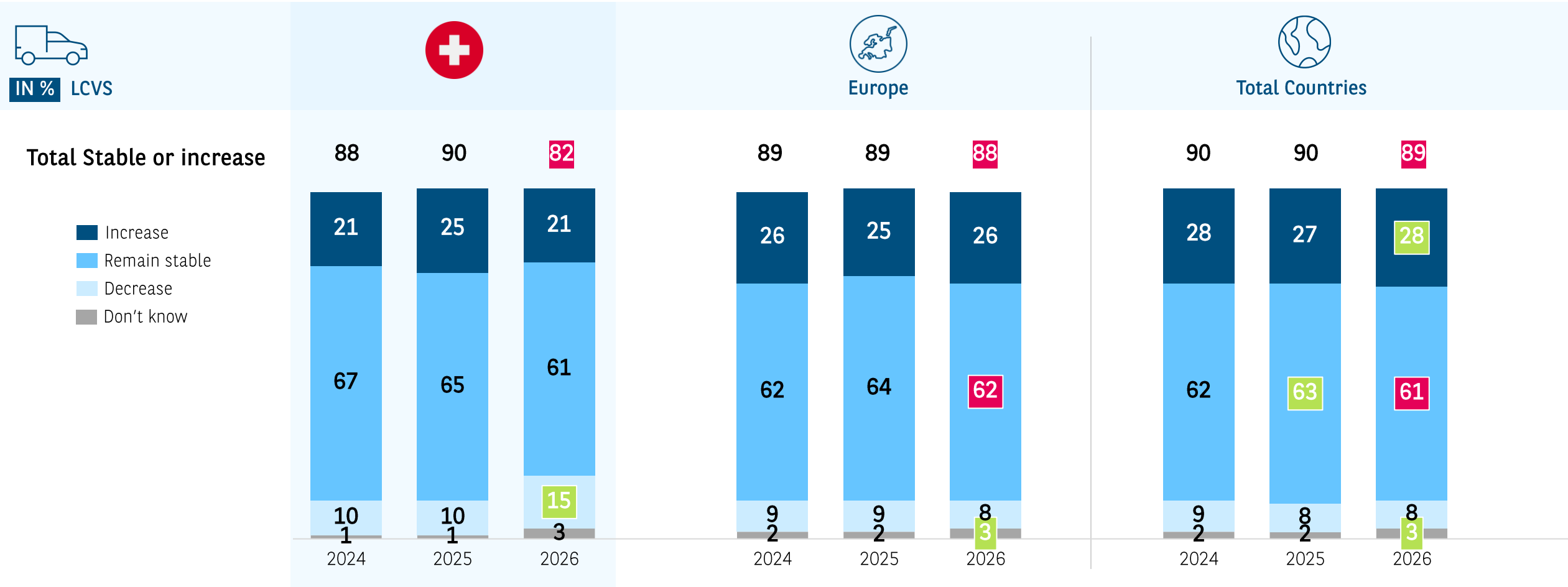
- Increase
- Remain stable
- Decrease
- Don't know



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

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 82% of the companies expect their LCV fleet to remain stable or to increase in the next 3 years.

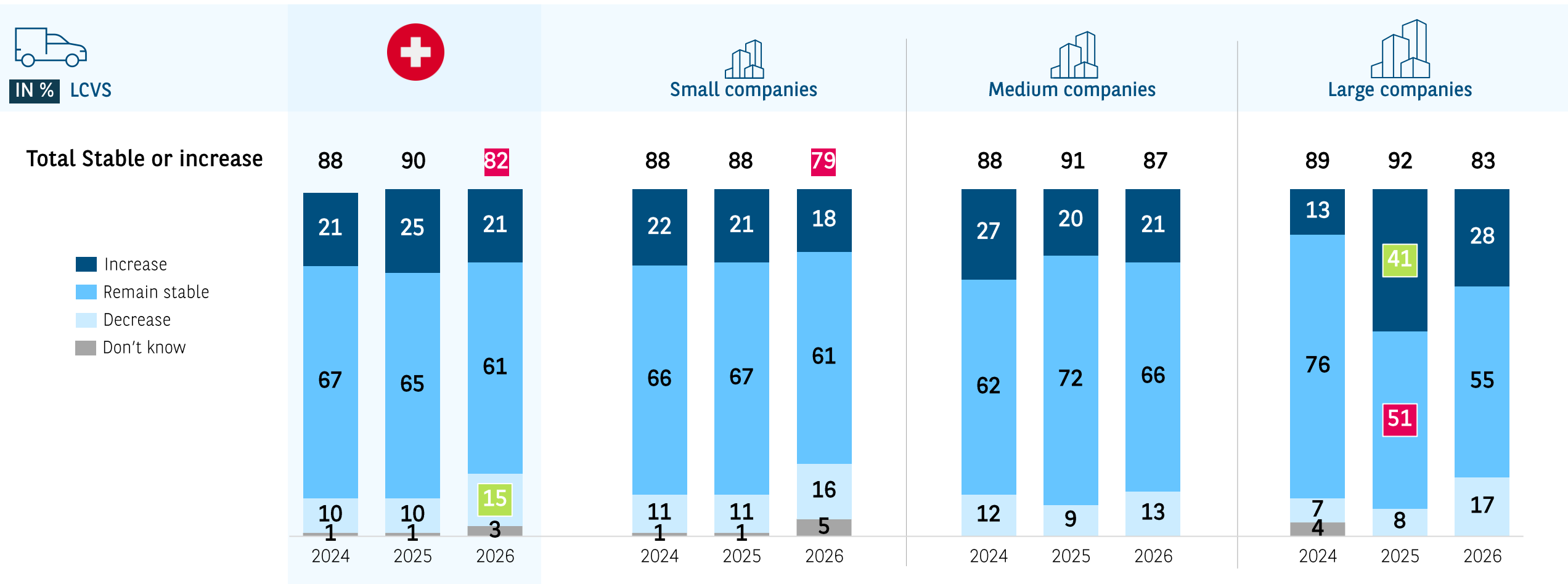


A10. In the next three years, do you think that the total number of your light commercial vehicles or vans will...?
Basis: companies with LCVs

X% Significantly higher / lower vs. previous wave

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 82% of the companies expect their LCV fleet to remain stable or to increase in the next 3 years.



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

X% Significantly higher / lower vs. previous wave

LCV FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 82% of the companies expect their LCV fleet to remain stable or to increase in the next 3 years.

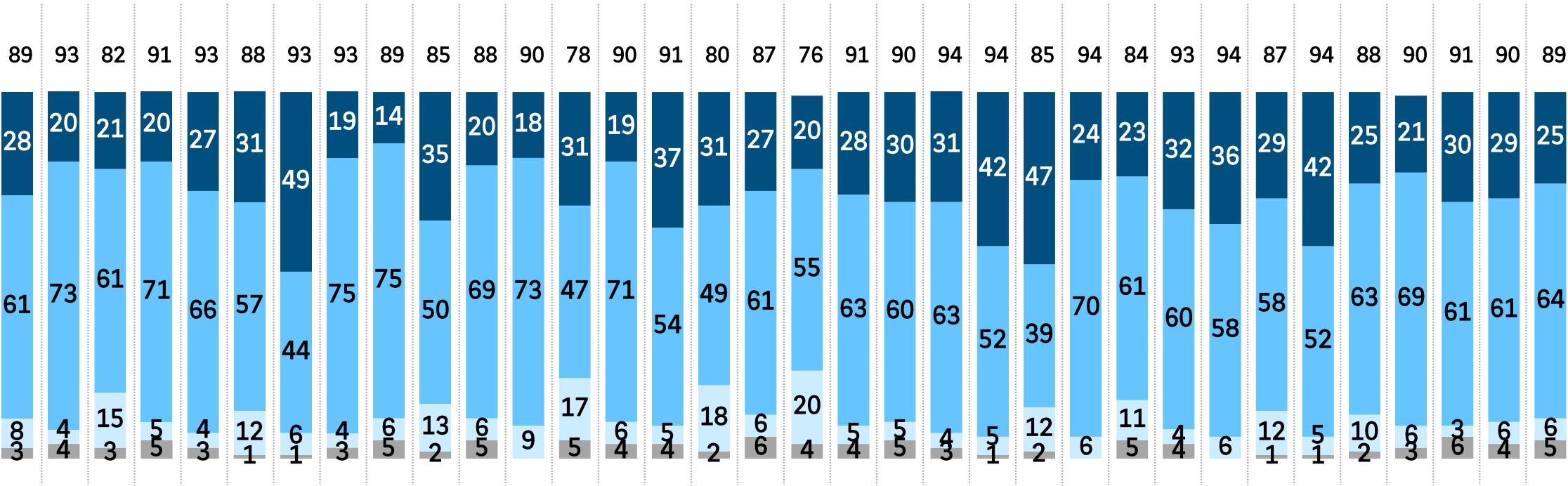


IN % LCVS



Total Stable or increase

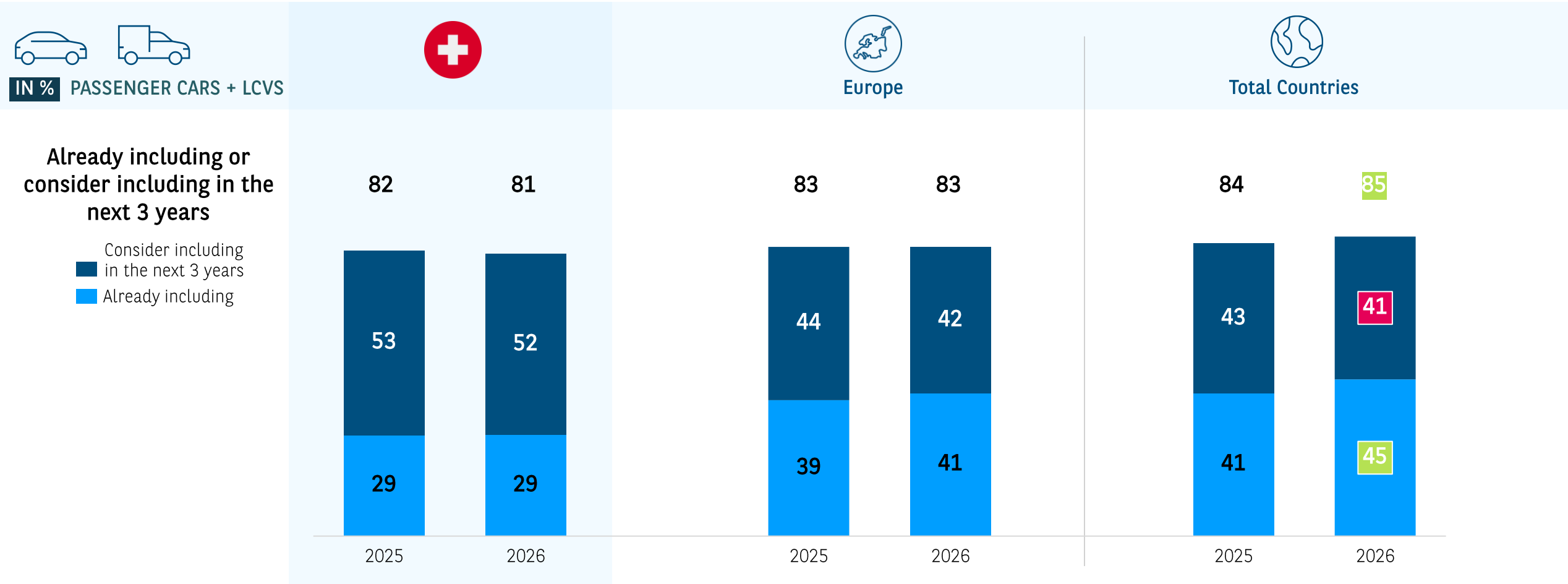
- Increase
- Remain stable
- Decrease
- Don't know



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

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 81% of the companies are already including vehicles that were not new when acquired or are considering doing so in the next 3 years.



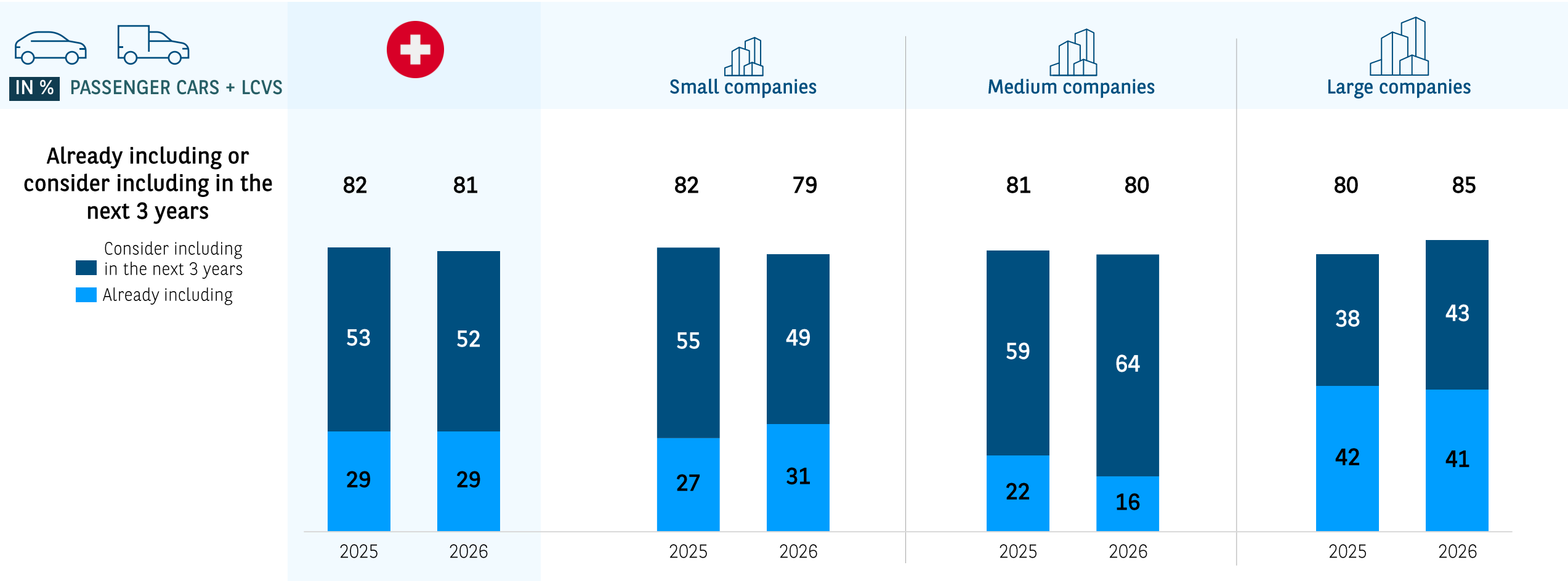
A14. Does your fleet include vehicles that were not new when you acquired them, or do you consider including some in the next 3 years?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

USED / SECOND-HAND VEHICLES POSSESSION

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 81% of the companies are already including vehicles that were not new when acquired or are considering doing so in the next 3 years.



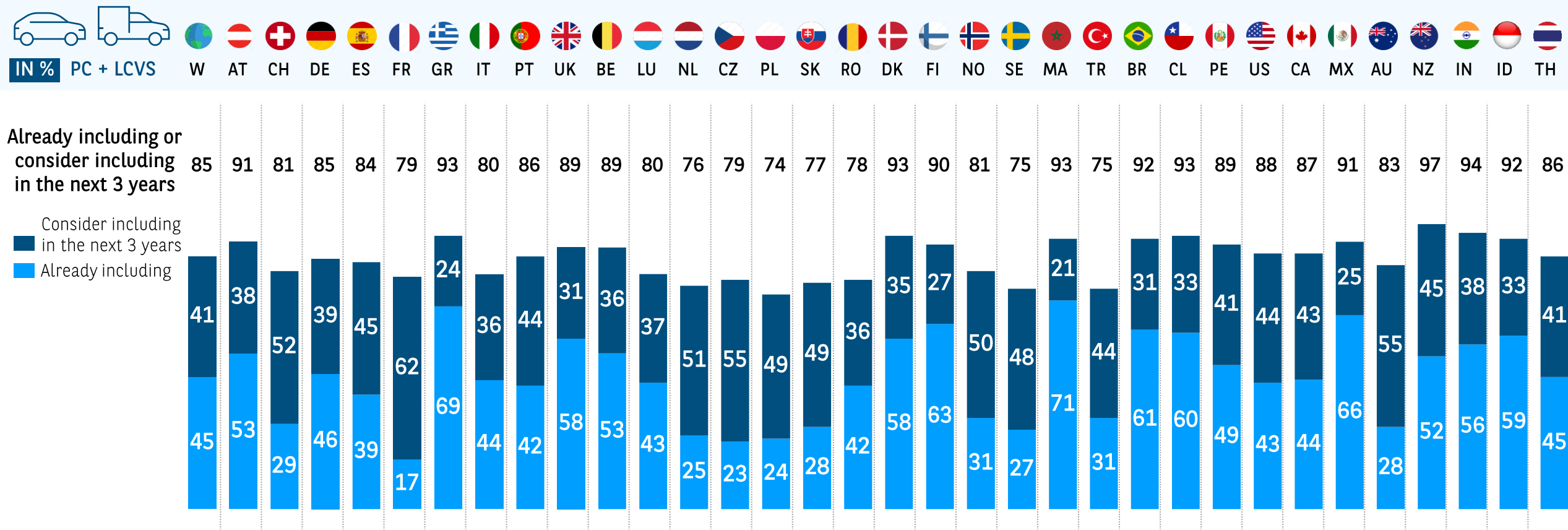
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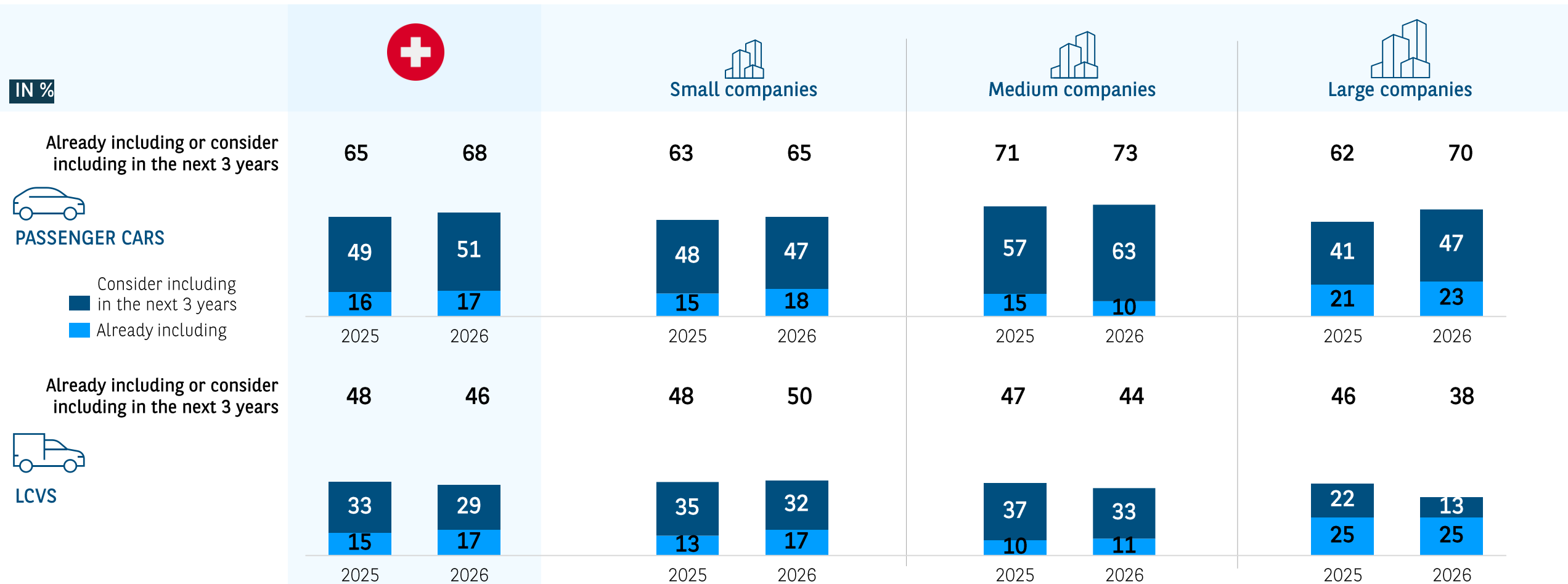


A14. Does your fleet include vehicles that were not new when you acquired them, or do you consider including some in the next 3 years?
Basis: companies with corporate vehicles = 100%

USED / SECOND-HAND VEHICLES POSSESSION

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 68% of the companies are already including or are considering including passenger cars that were not new when acquired. 46% of the companies are already including or are considering including LCVs that were not new when acquired.



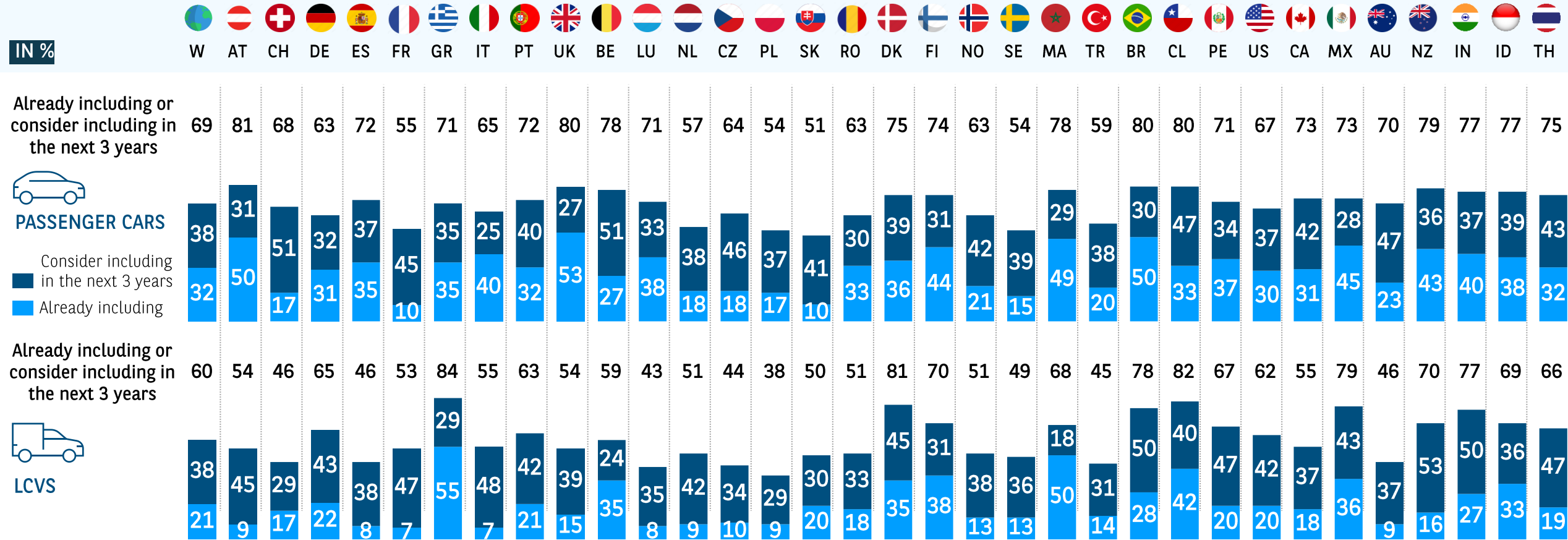
A14. Does your fleet include vehicles that were not new when you acquired them, or do you consider including some in the next 3 years?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

USED / SECOND-HAND VEHICLES POSSESSION

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 68% of the companies are already including or are considering including passenger cars that were not new when acquired. 46% of the companies are already including or are considering including LCVs that were not new when acquired.



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

Basis: companies with corporate vehicles = 100%

AVERAGE ANNUAL MILEAGE PER VEHICLE

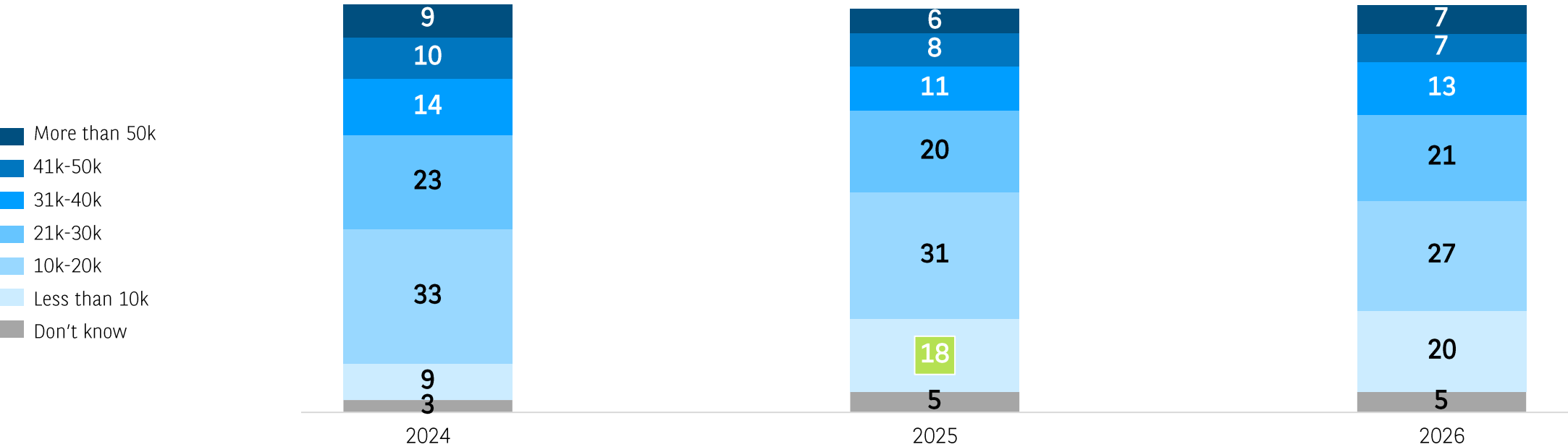
HOW TO READ THE RESULTS ?

In 2026, 20% of the vehicles have an average annual mileage of less than 10,000 km.



Local question

IN % PASSENGER CARS + LCVS



DE32A. What is the average annual mileage per vehicle in your fleet?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

02

FINANCING METHODS

How do companies finance their fleets?



More than a quarter of Swiss companies continue to use operational/full-service leasing as their primary financing method

Currently, 27% of Swiss companies use operational/full-service leasing as the primary financing method for their fleets, a stable figure that is consistent across company sizes and aligns with the European average of 28%.

Outright/direct purchase is the predominant financing method, employed by 36% of companies, followed by financial leasing, used by 32%.

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

Among Swiss companies using or considering second-hand vehicles, 27% use operational/full-service leasing as their main financing method, or plan to do so if considering second-hand vehicles, consistent with the European average of 28%.

The growth potential for operational/full-service leasing remains moderate

In 2026, 17% of Swiss companies intend to introduce or increase their use of operational/full-service leasing for fleet financing, stable below the European average of 36%.



HOW TO READ THE RESULTS ?

In Switzerland in 2026, 27% of the companies are using operational / full-service leasing as main method to finance their company vehicles.

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

 **IN % PASSENGER CARS + LCVS**

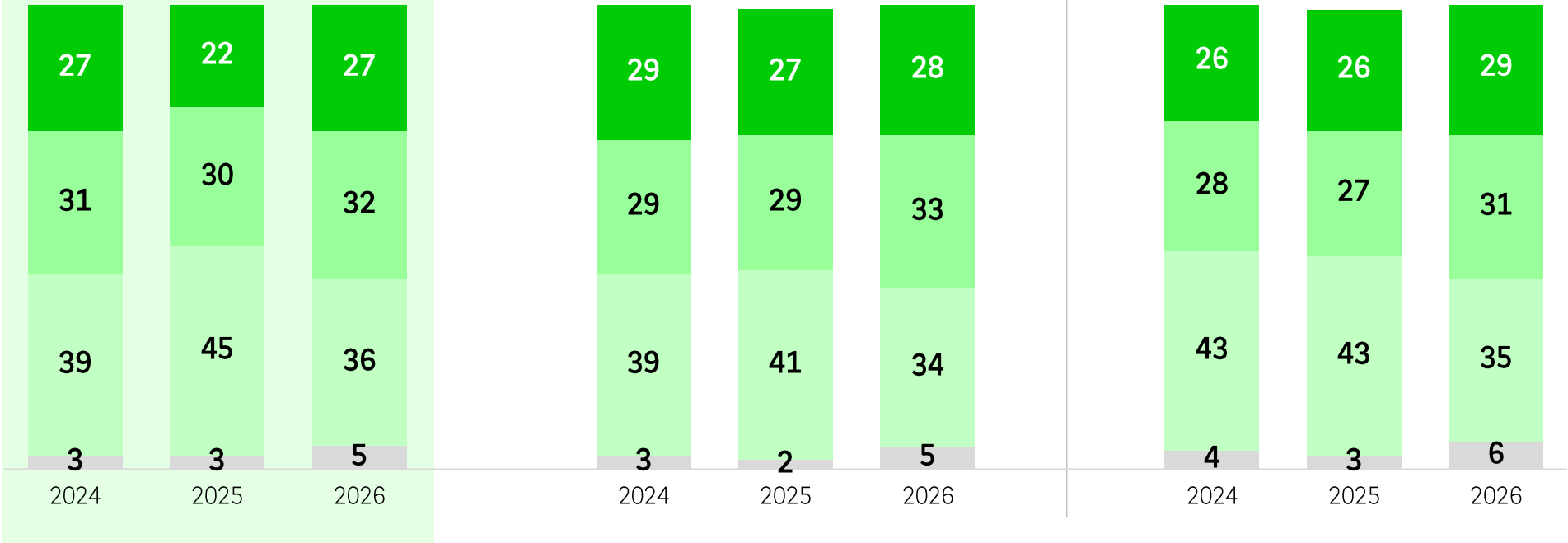


Europe



Total Countries

- Operational / full-service leasing
- Financial leasing
- Outright / direct purchase (+ Credit in 2024 and 2025)
- Other / don't know

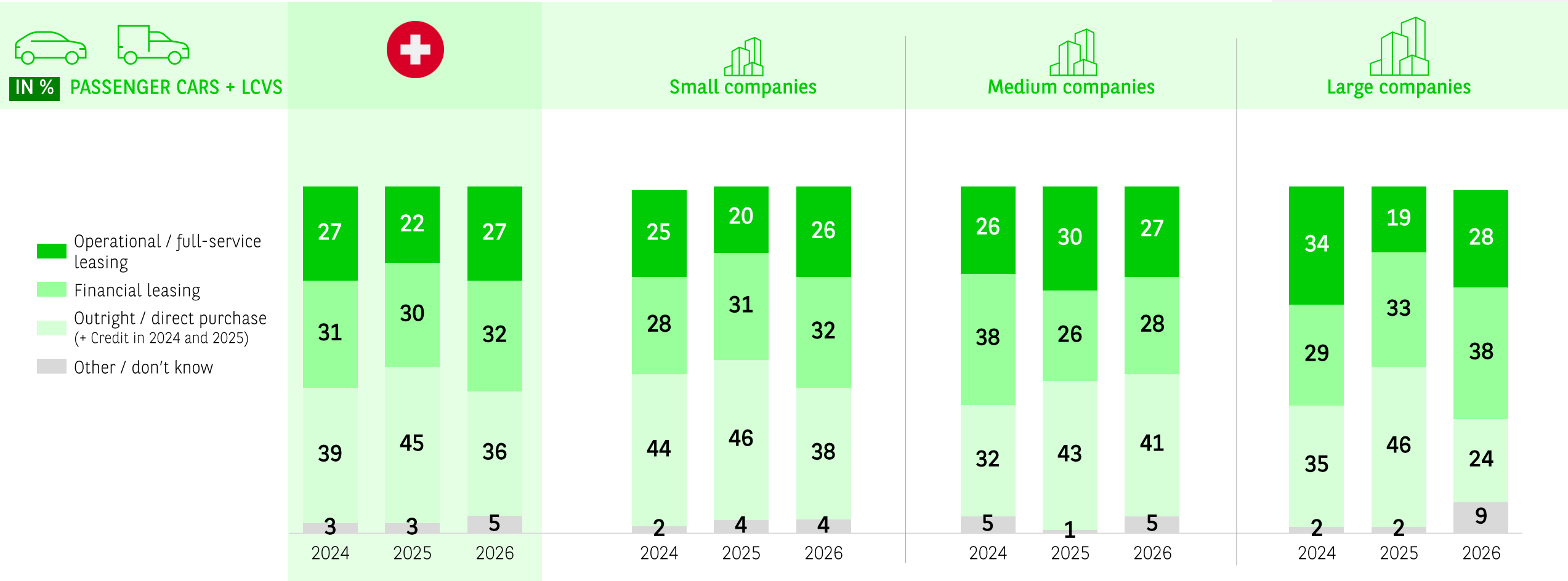


B2. What is the main method used to finance your company vehicles today?
Basis: companies with corporate vehicles = 100%

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 27% of the companies are using operational / full-service leasing as main method to finance their company vehicles.

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



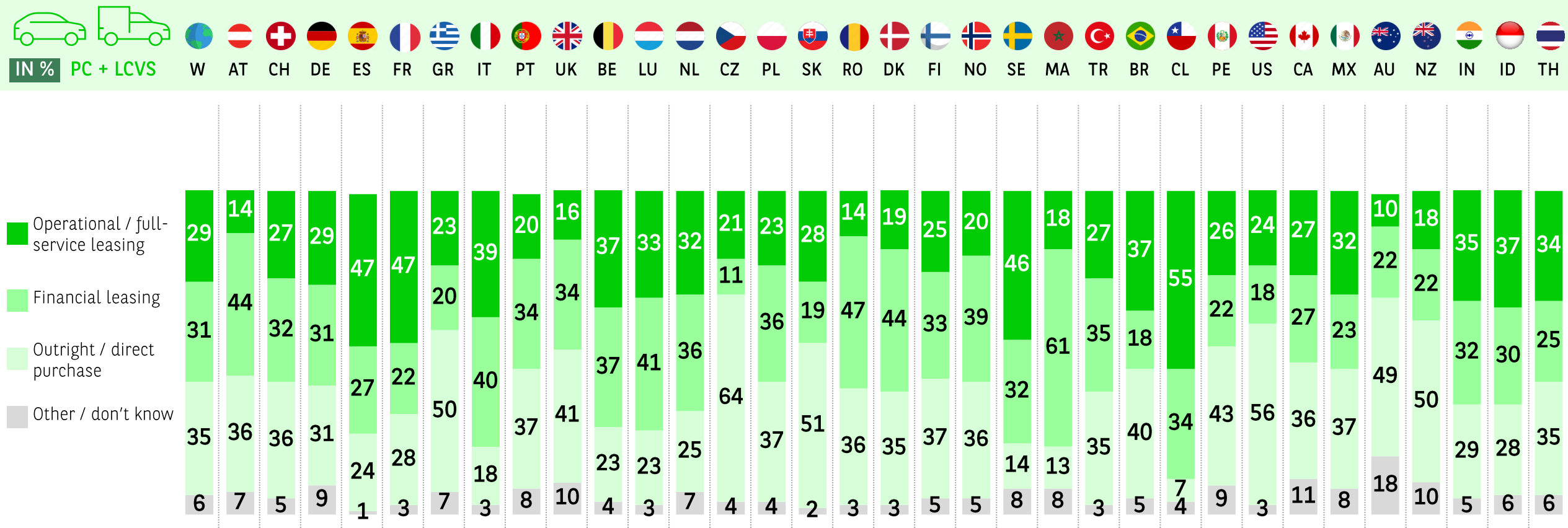
B2. What is the main method used to finance your company vehicles today?
Basis: companies with corporate vehicles = 100%

MAIN FLEET FINANCING METHOD

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 27% of the companies are using operational / full-service leasing as main method to finance their company vehicles.

Item "Credit" deleted in 2026



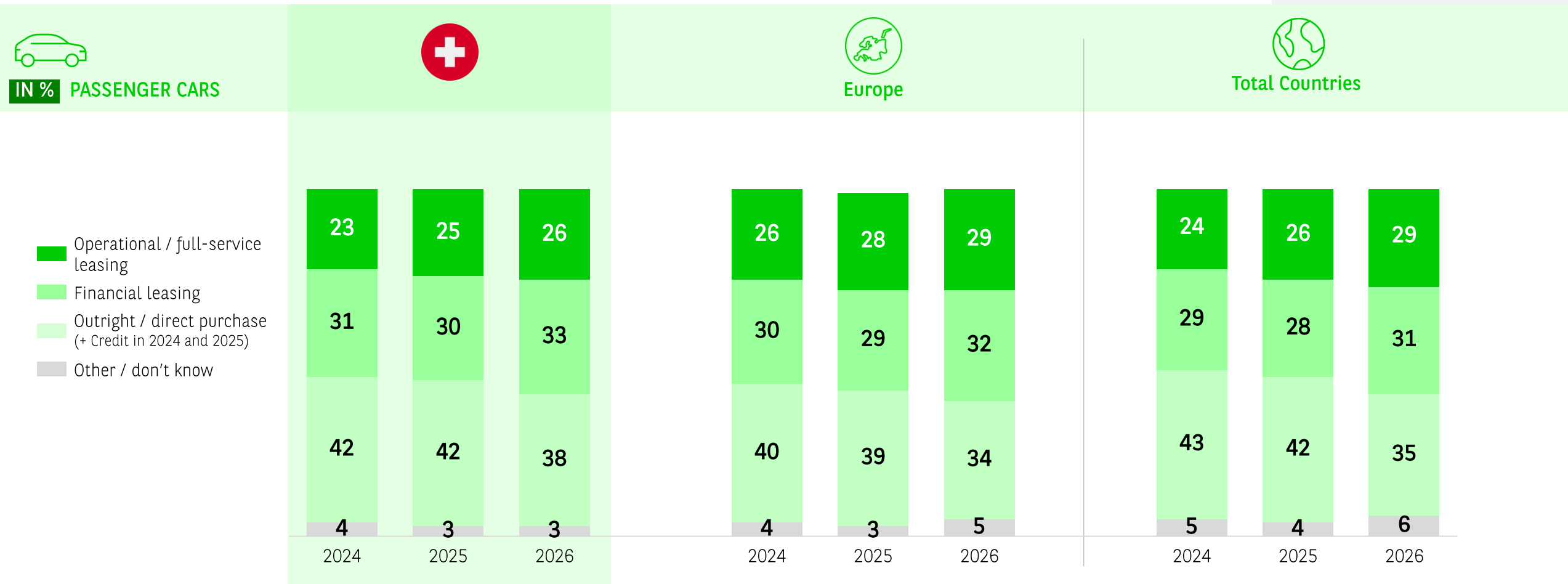
B2. What is the main method used to finance your company vehicles today?
Basis: companies with corporate vehicles = 100%

MAIN PASSENGER CARS FINANCING METHOD

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 26% of the companies are using operational / full-service leasing as main method to finance their passenger cars.

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



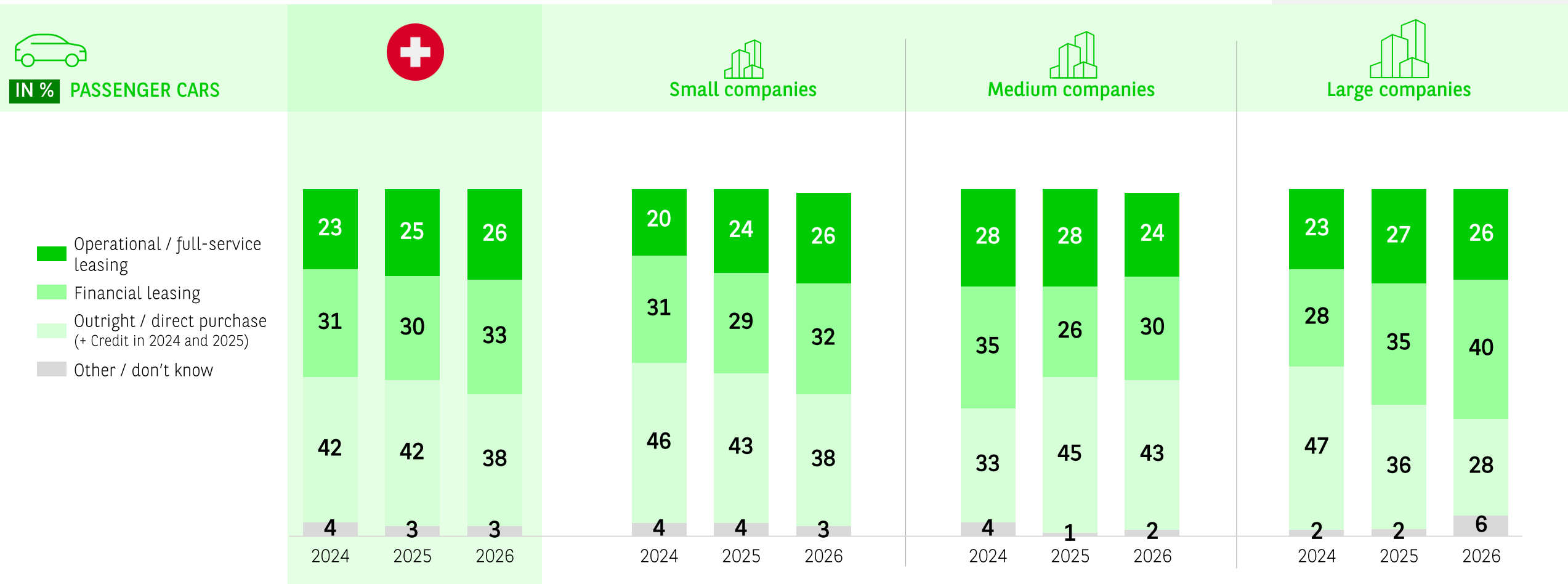
B3. And what is the main method used to finance your passenger cars today?
Basis: companies with passenger cars

MAIN PASSENGER CARS FINANCING METHOD

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 26% of the companies are using operational / full-service leasing as main method to finance their passenger cars.

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



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

MAIN PASSENGER CARS FINANCING METHOD

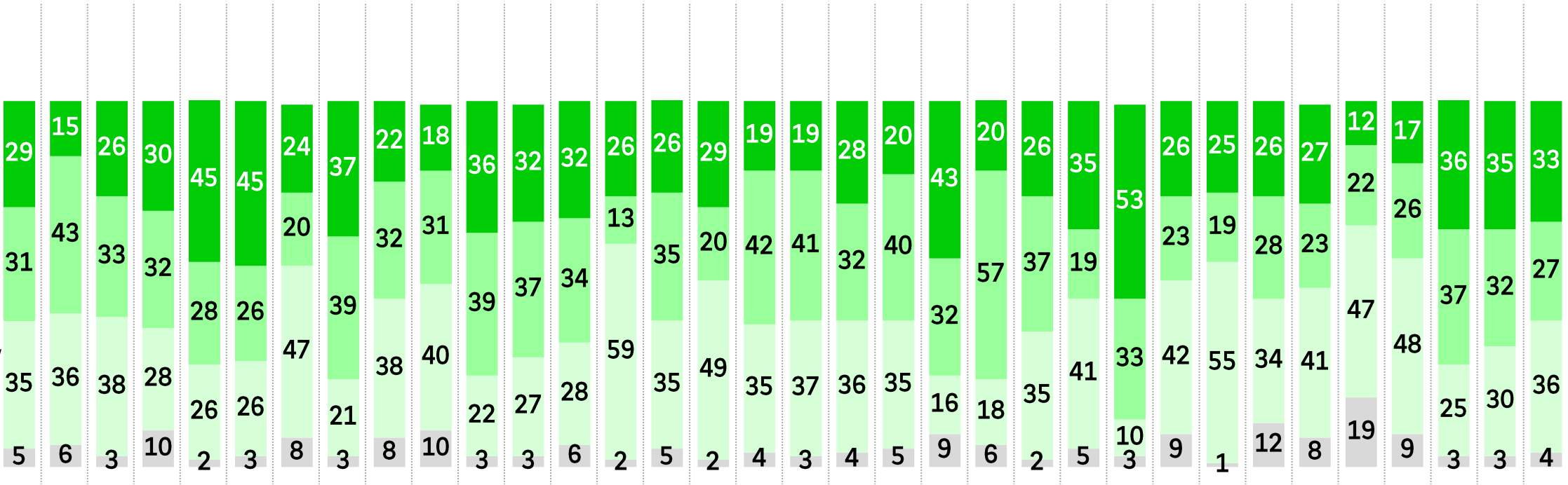
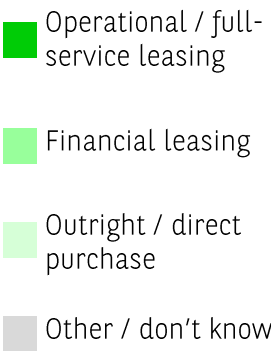
HOW TO READ THE RESULTS ?

In Switzerland in 2026, 26% of the companies are using operational / full-service leasing as main method to finance their passenger cars.

Item "Credit" deleted in 2026



IN % CARS

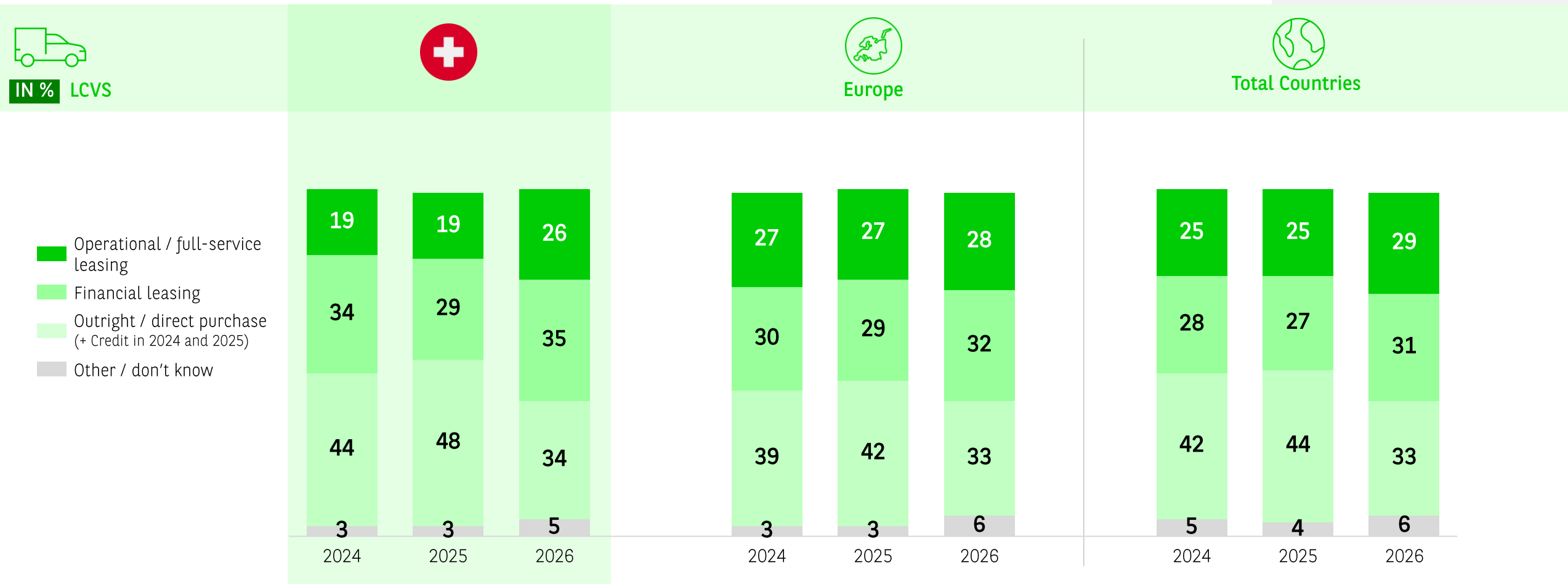


B3. And what is the main method used to finance your passenger cars today?
Basis: companies with passenger cars

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 26% of the companies are using operational / full-service leasing as main method to finance their LCVs.

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

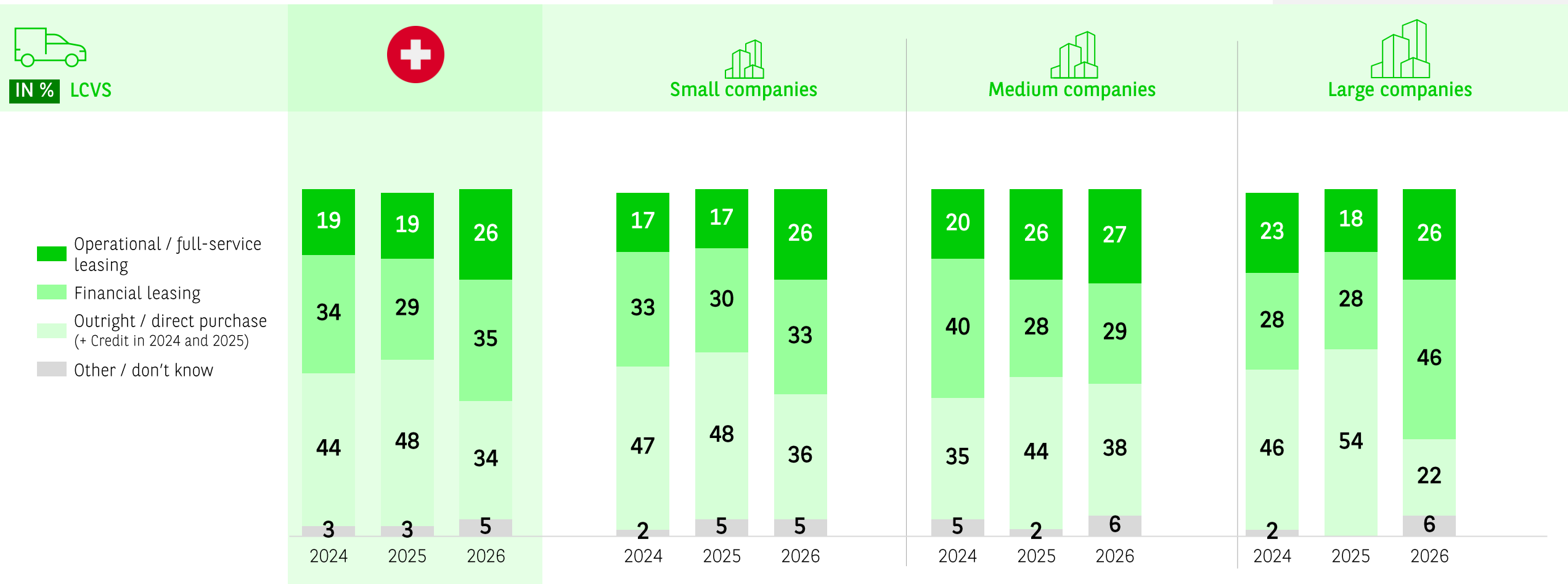


B4. And what is the main method used to finance your light commercial vehicles or vans today?
Basis: companies with LCVs

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 26% of the companies are using operational / full-service leasing as main method to finance their LCVs.

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



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

MAIN LCV FINANCING METHOD

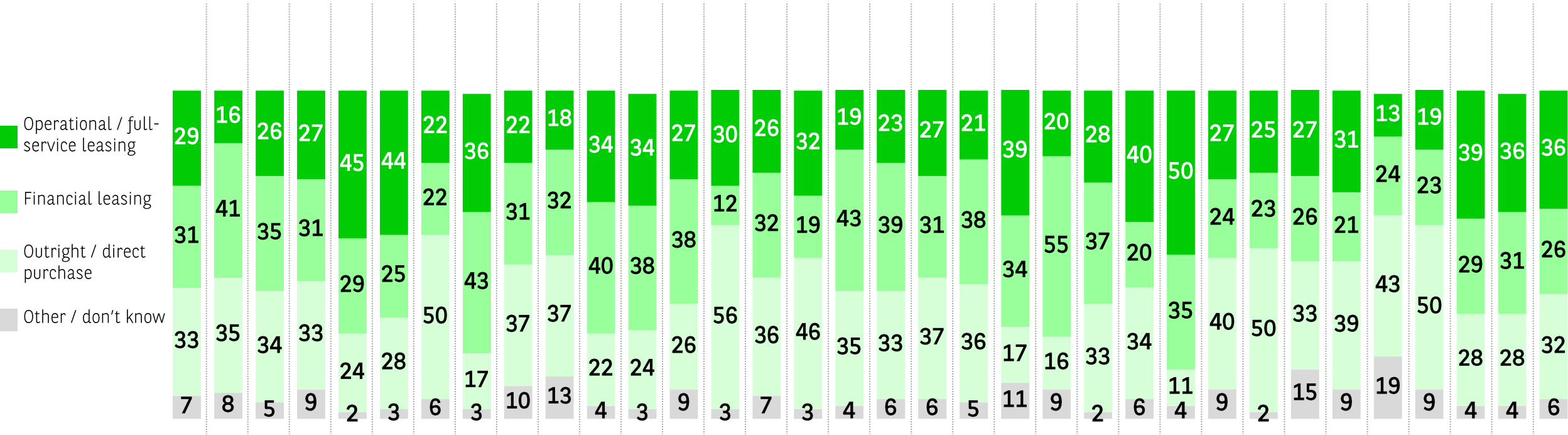
HOW TO READ THE RESULTS ?

In Switzerland in 2026, 26% of the companies are using operational / full-service leasing as main method to finance their LCVs.

Item "Credit" deleted in 2026



IN % LCVS



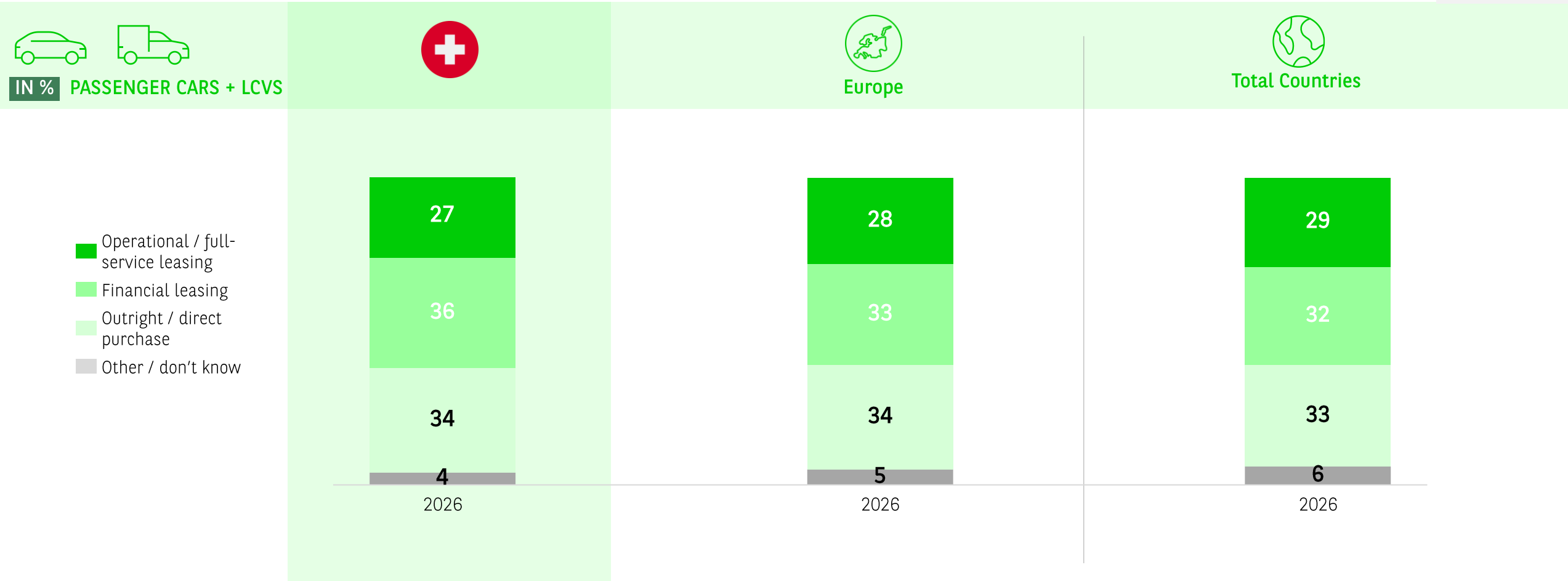
B4. And what is the main method used to finance your light commercial vehicles or vans today?
Basis: companies with LCVs

MAIN FLEET FINANCING METHOD FOR SECOND-HAND VEHICLES

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 27% of the companies considering or having second-hand vehicles are (plan on) using operational / full-service leasing as main method to finance their company second-hand vehicles.

New question



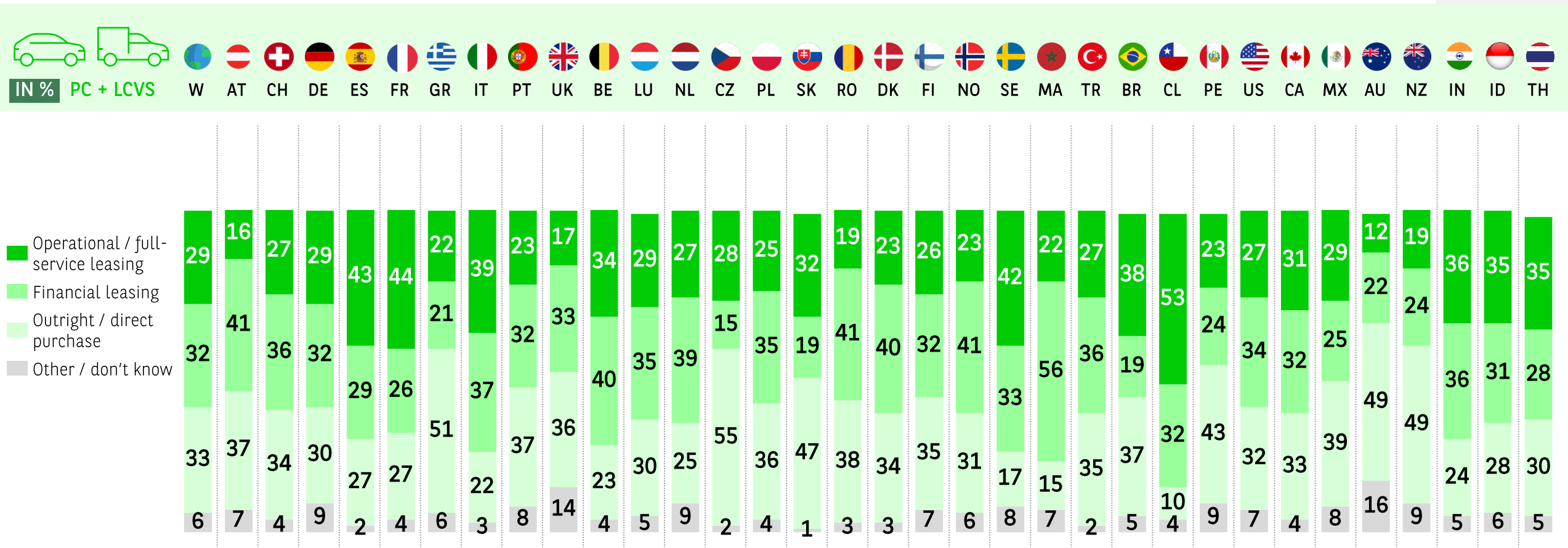
B5. What is the (planned) main method currently used to finance the second-hand vehicles in your fleet?
Basis: companies considering or having corporate second-hand vehicles

MAIN FLEET FINANCING METHOD FOR SECOND-HAND VEHICLES

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 27% of the companies considering or having second-hand vehicles are (plan on) using operational / full-service leasing as main method to finance their company second-hand vehicles.

New question

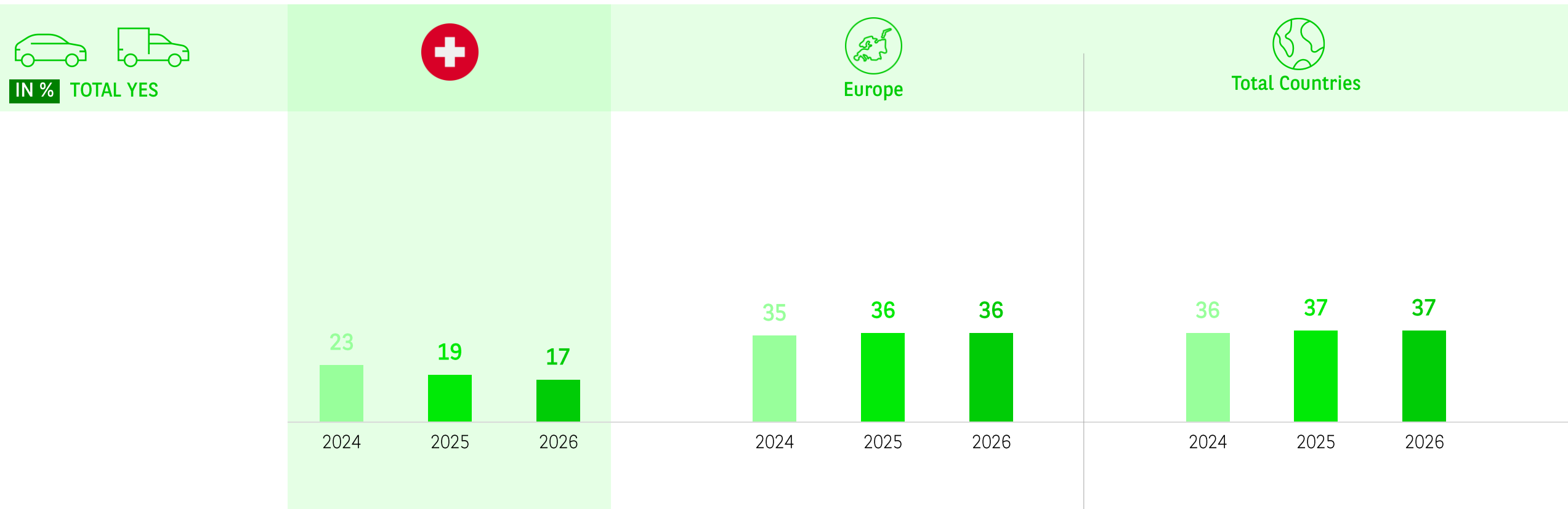


B5. What is the (planned) main method currently used to finance the second-hand vehicles in your fleet?
Basis: companies considering or having corporate second-hand vehicles

INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATIONAL / FULL-SERVICE LEASING

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 17% of the companies intend to introduce or increase the use of operational / full-service leasing to finance their corporate fleet in the next three years.



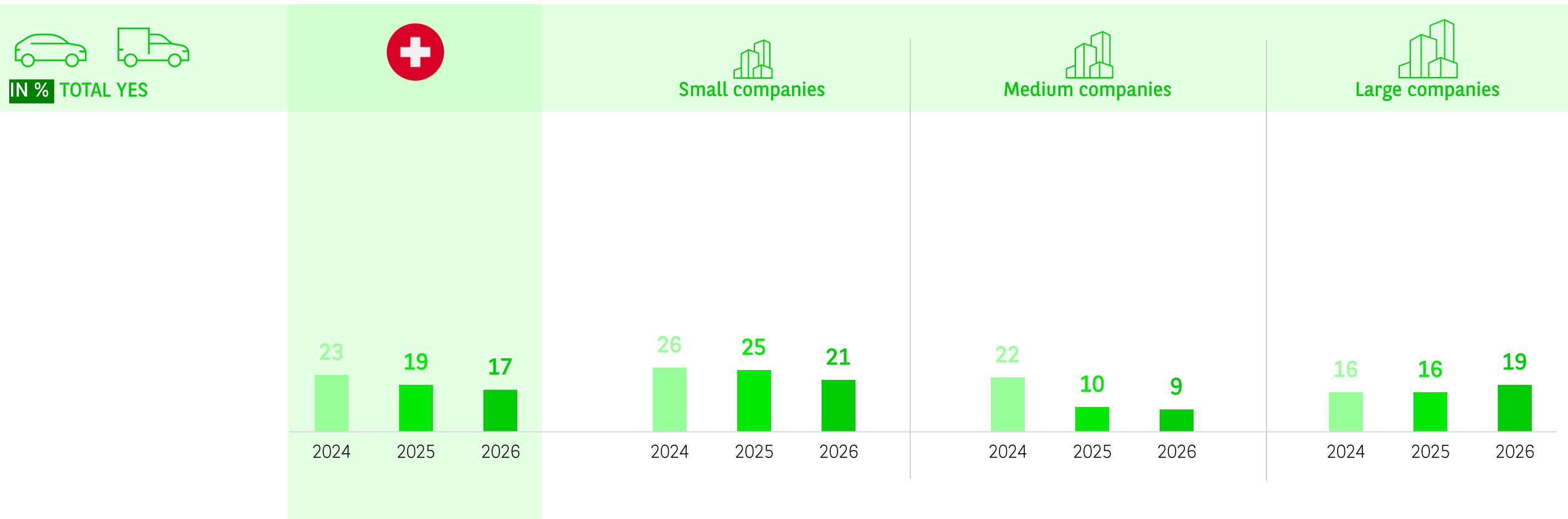
B8bis. In the next three years do you intend to either introduce or increase the use of operational / full-service leasing to finance your corporate fleet?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATIONAL / FULL-SERVICE LEASING

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 17% of the companies intend to introduce or increase the use of operational / full-Service Leasing to finance their corporate fleet in the next three years.



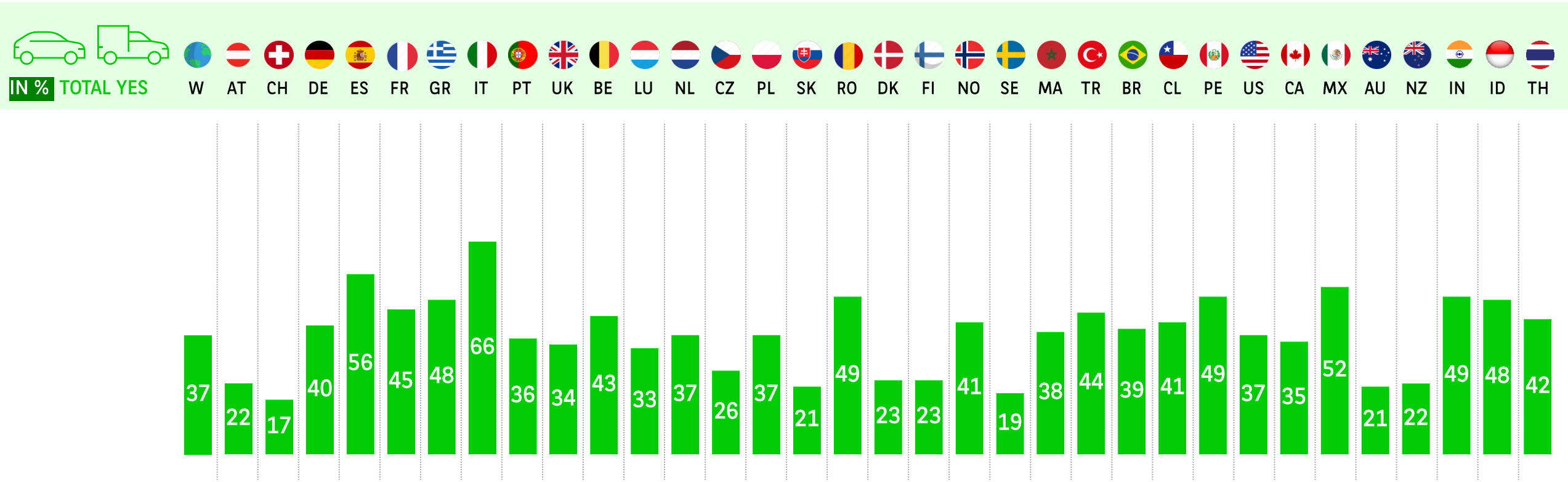
B8bis. In the next three years do you intend to either introduce or increase the use of operational / full-service leasing to finance your corporate fleet?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATIONAL / FULL-SERVICE LEASING

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 17% of the companies intend to introduce or increase the use of operational / 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 / full-service leasing to finance your corporate fleet?
Basis: companies with corporate vehicles = 100%

03

ENERGY MIX

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



Passenger car fleet electrification remains generally stable in Switzerland

54% of Swiss companies have implemented at least one type of electrified technology (HEV, PHEV, or BEV) for passenger cars, a trend that is stable and aligns with the European average of 57%. An additional 27% are considering adopting these technologies.

Implementation is primarily driven by large companies (64% compared to 51% for small and 50% for medium-sized companies), while consideration is more prevalent among medium-sized companies (37% compared to 26% for small and 19% for large companies).

Notably, small companies are less likely to use or consider implementing electrified technology for passenger cars in 2026 than in 2025 (77% vs. 89%).

Hybrids remain the preferred technology for the passenger cars fleets' transition in Switzerland

In 2026, 28% of Swiss companies are equipped with HEVs, 21% with PHEVs and 18% with BEVs, maintaining stable levels compared to 2025. All technologies are closely considered (23% for PHEVs and BEVs, 22% for HEVs).

Swiss companies continue to embrace electrification for its lower environmental impact

In 2026, 47% of Swiss companies are transitioning to electrified technologies for this reason.

Other significant motivations for adopting electrification include lower fuel expenses (38%), CSR compliance (37%), and image benefits (36%).

The electrification for LCVs remains confidential

4% of companies in Switzerland have adopted BEVs for their LCV fleets, slightly below the European average of 9%. 13% are considering this adoption. These figures are stable compared to 2025.

Infrastructure gaps remain the key obstacle to electrification

The main barrier to broader EV adoption for passenger cars remains the lack of charging points, whether on streets, at home, or in corporate settings, as reported by 73% of Swiss companies, slightly higher than the European average of 68%.

On-site charging at company premises is increasingly prioritized

In 2026, charging at the company premises is currently or will be a part of the charging policy for 82% of fleets in Switzerland (passenger cars or LCVs), aligning with the European trend of 86%. Among these fleets, 60% have already installed charging stations or plan to within the next year, now aligning with the European average of 57% after a 15-point increase since 2025.

Public charging follows as the second most popular option, with 65% of companies considering this approach, matching the European average. Among these, 62% reimburse energy costs through expense claims, while 38% provide energy cards to drivers, like other European markets.

Home charging remains the least common practice, adopted by only 20% of companies, like the rate in Europe (21%). Among these companies, 85% offer or plan to offer at least one charging solution to company car drivers, such as wallboxes (58%), reinforced sockets (40%), or smart cables (14%). Additionally, 94% provide financial support for home charging, with 44% offering partial coverage, another 40% offering full coverage, and 10% providing lump-sums.

Furthermore, 39% fully reimburse energy costs, while 29% offer partial reimbursement.

A divided strategy regarding the 2030 regulations for BEVs

43% of the companies in Switzerland would take all necessary measures to comply with the regulations required to switch fleet of passenger company cars exclusively to BEVs by 2030 at the latest. 48% of the companies would transfer the choice of mobility means to their employees by offering them a mobility budget instead of a company car. And 10% of the companies would remove all mobility benefits from their compensation package, unless they are mandatory by law.

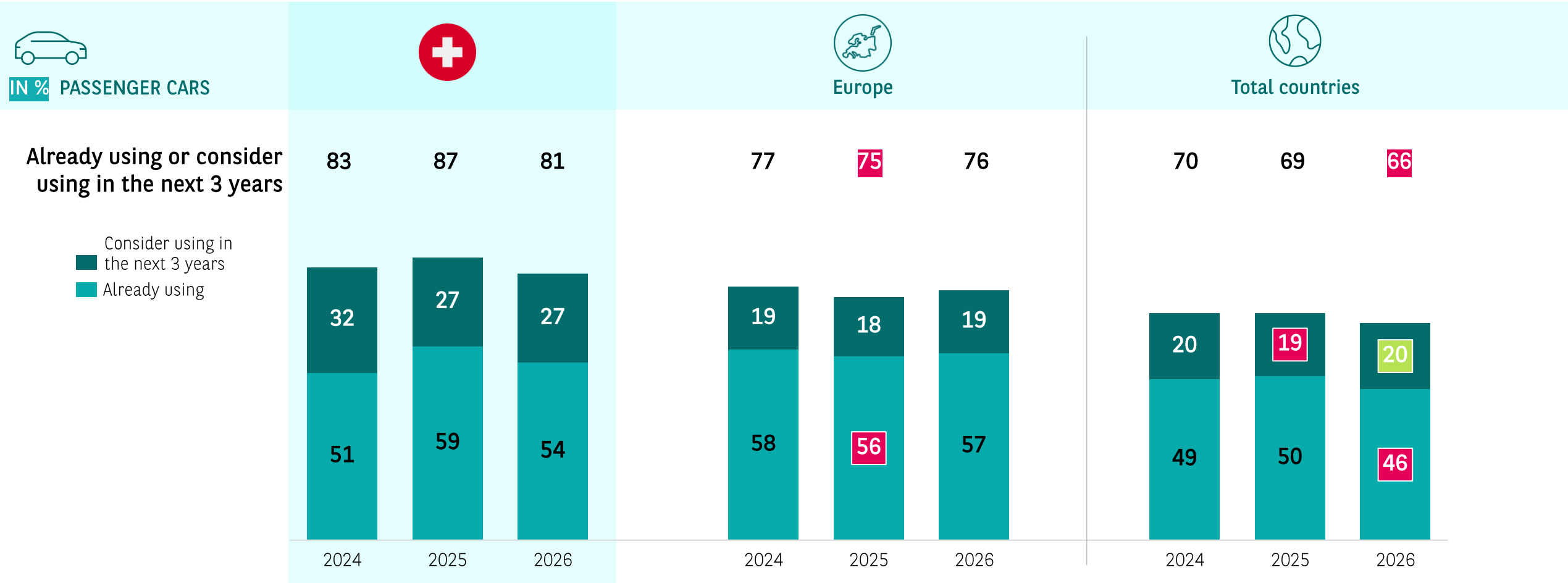
Leasing providers significantly influence energy mix decisions

Overall, 85% of Swiss companies using full-service or financial leasing claim that their provider influences their energy mix choices.

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

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 81% of the companies with passenger cars are already using at least one electrified vehicles technology among BEV, PHEV, HEV or are considering doing so in the next 3 years.



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

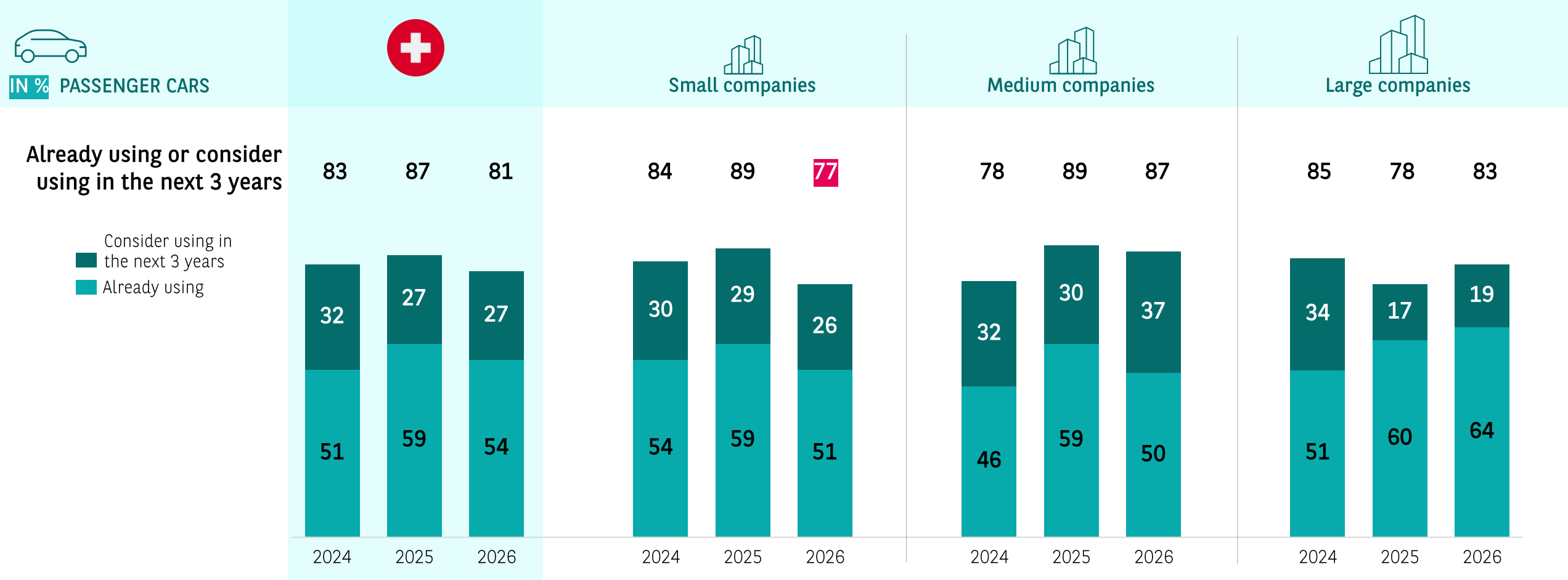
X% Significantly higher / lower vs. previous wave

ELECTRIFIED VEHICLES TECHNOLOGIES USAGE

AT LEAST ONE TECHNOLOGY AMONG BEV, PHEV, HEV

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 81% of the companies with passenger cars are already using at least one electrified vehicles technology among BEV, PHEV, HEV or are considering doing so in the next 3 years.



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ELECTRIFIED VEHICLES TECHNOLOGIES USAGE

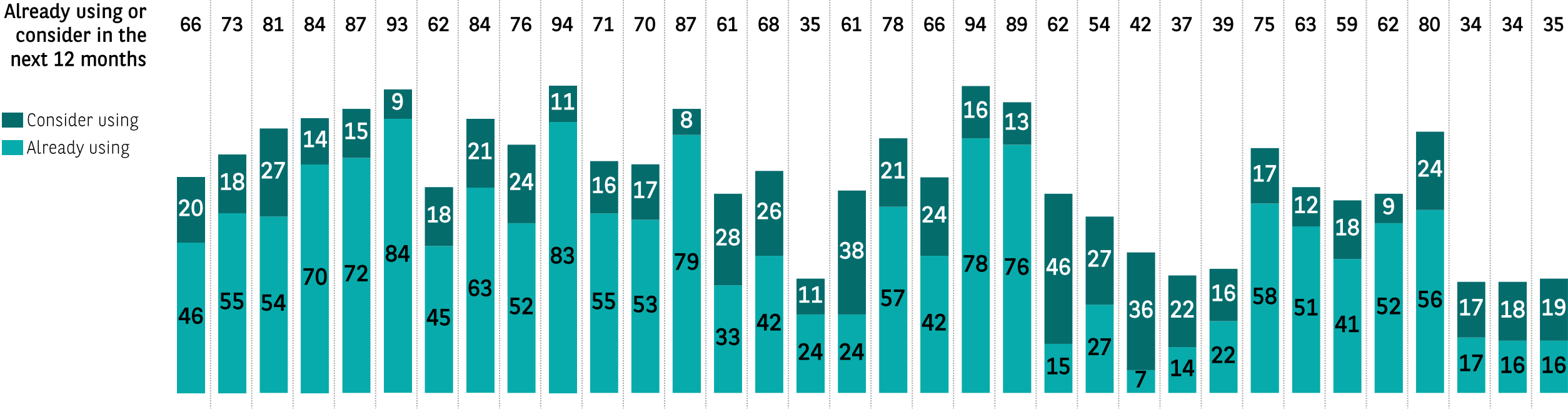
AT LEAST ONE TECHNOLOGY AMONG BEV, PHEV, HEV

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 81% of the companies with passenger cars are already using at least one electrified vehicles technology among BEV, PHEV, HEV or are considering doing so in the next 3 years.



IN % PC



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

ELECTRIFIED VEHICLES TECHNOLOGIES USAGE

DETAIL PER TECHNOLOGY

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 41% of the companies with passenger cars are already using BEV or are considering using it in the next three years.

 IN % PASSENGER CARS				
			Europe	Total countries
		Use Consider Total		
BEV	2026	18 23 41	24 17 40	18 15 33
	2025	20 25 45	22 17 39	19 15 34
	2024	21 28 49	24 17 42	20 16 36
PHEV	2026	21 23 45	28 15 43	22 13 35
	2025	19 26 46	28 14 41	23 13 36
	2024	22 20 42	29 14 43	23 13 36
HEV	2026	28 22 50	28 14 42	23 14 36
	2025	33 19 52	27 13 40	24 13 37
	2024	25 22 47	28 14 42	23 14 38

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

X% Significantly higher / lower vs. previous wave

ELECTRIFIED VEHICLES TECHNOLOGIES USAGE

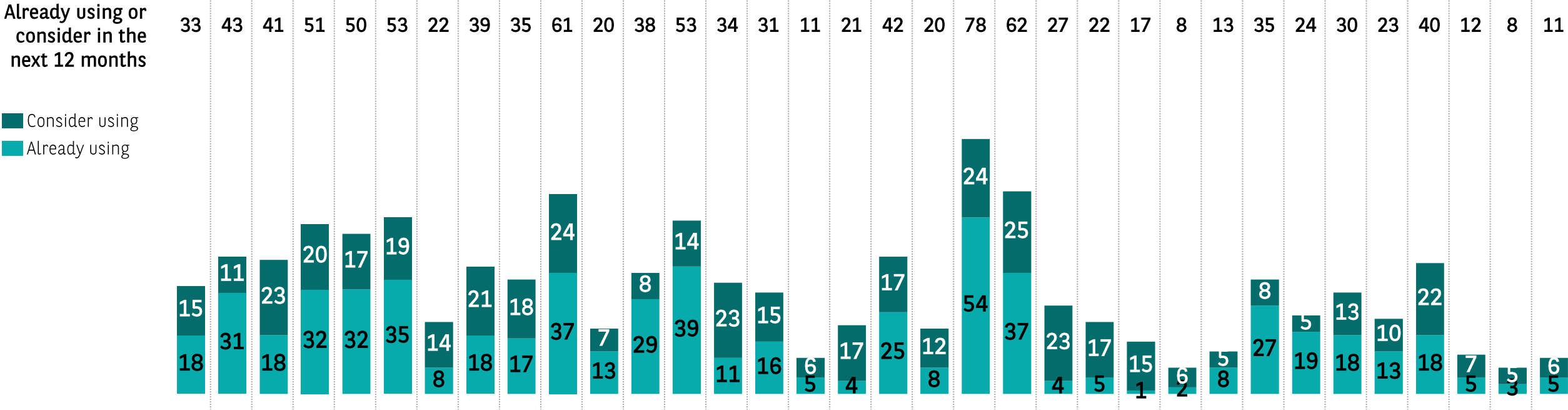
FOCUS ON BEV

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 41% of the companies with passenger cars are already using BEV or are considering using it in the next three years.



IN % PC



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

ELECTRIFIED VEHICLES TECHNOLOGIES USAGE

FOCUS ON PHEV

HOW TO READ THE RESULTS ?

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

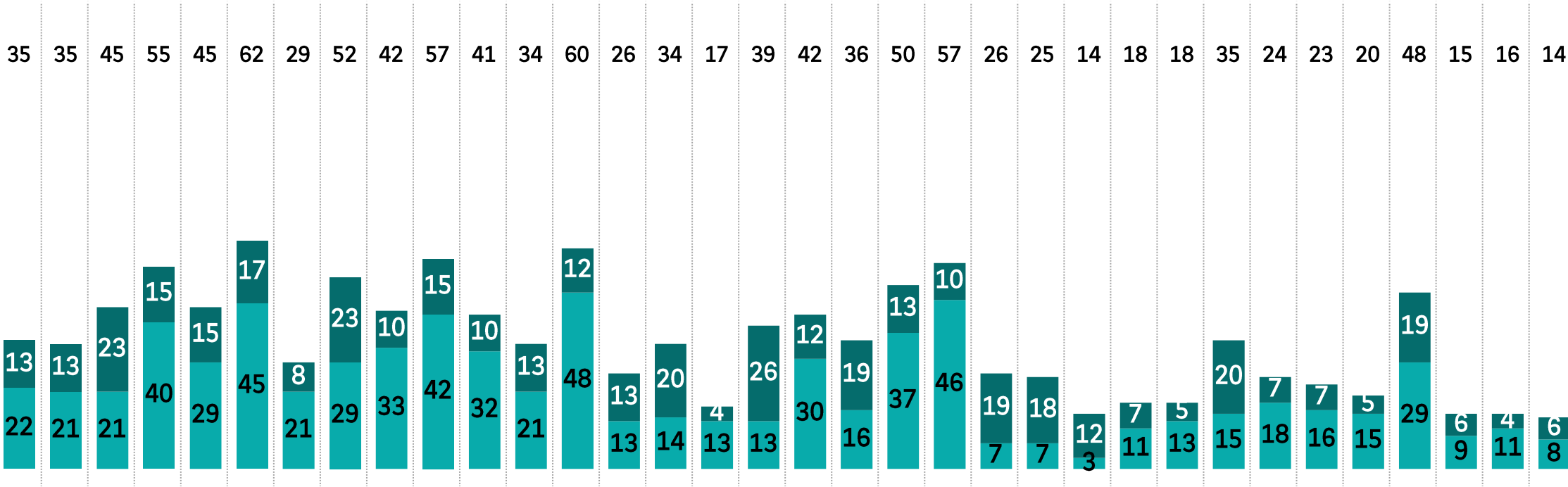


IN % PC



Already using or
consider in the
next 12 months

Consider using
Already using



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

ELECTRIFIED VEHICLES TECHNOLOGIES USAGE

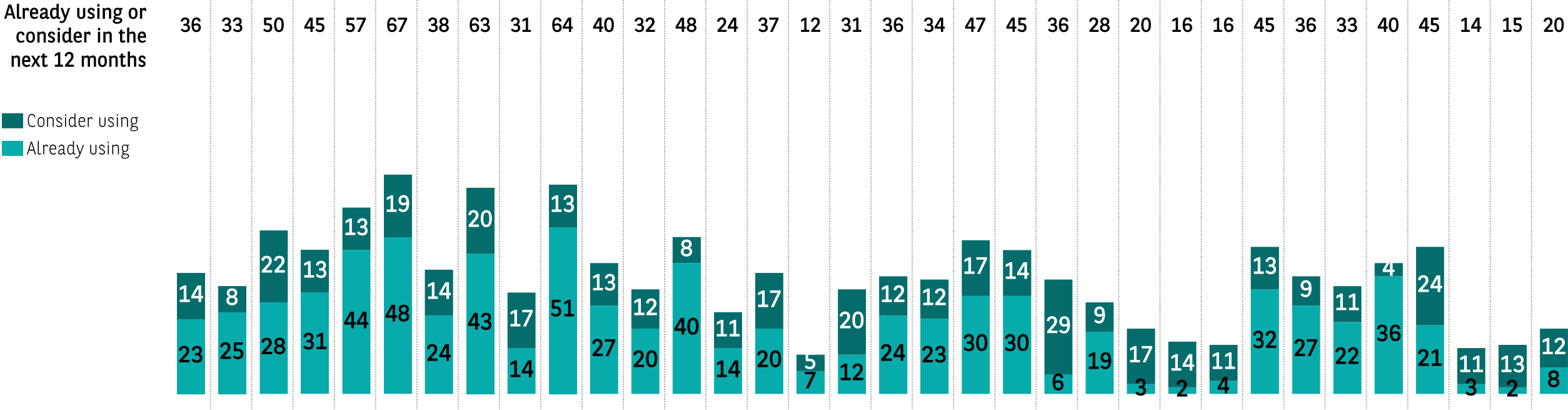
FOCUS ON HEV

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 50% of the companies with passenger cars are already using HEV or are considering using it in the next three years.



IN % PC



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

REASONS FOR IMPLEMENTING ELECTRIFIED VEHICLES TECHNOLOGIES FOR PASSENGER CARS

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 47% of the companies with passenger cars are already using electrified vehicles technologies or are considering it Because of their lower environmental impact.



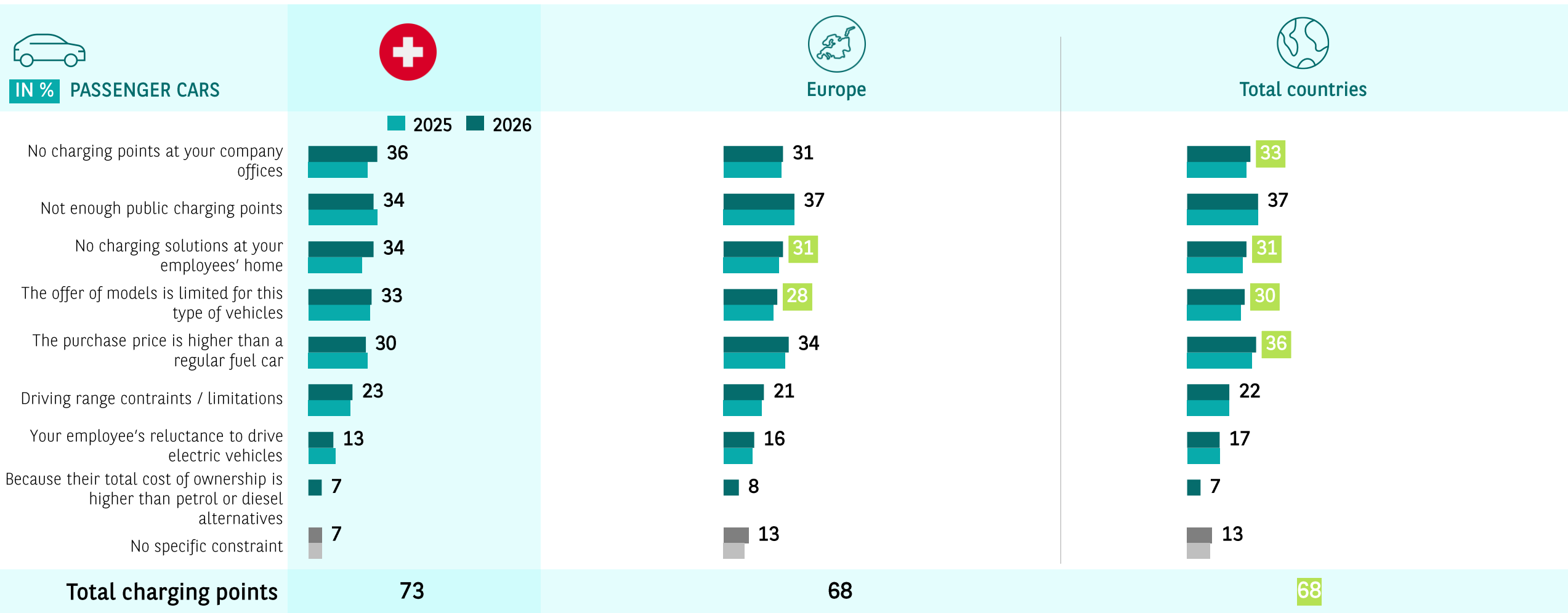
E28A. Why have you already implemented or why do you consider implementing these electrified vehicles technologies?
Basis: companies that are already using or considering using electrified vehicles technologies for passenger cars

X% Significantly higher / lower vs. previous wave

CONSTRAINTS FOR USING ELECTRIC PASSENGER CARS

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 36% of the companies with passenger cars declare that the main constraint for using electric passenger cars is: No charging points at your company offices. And 73% of the companies mention at least one reason related to charging points.



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

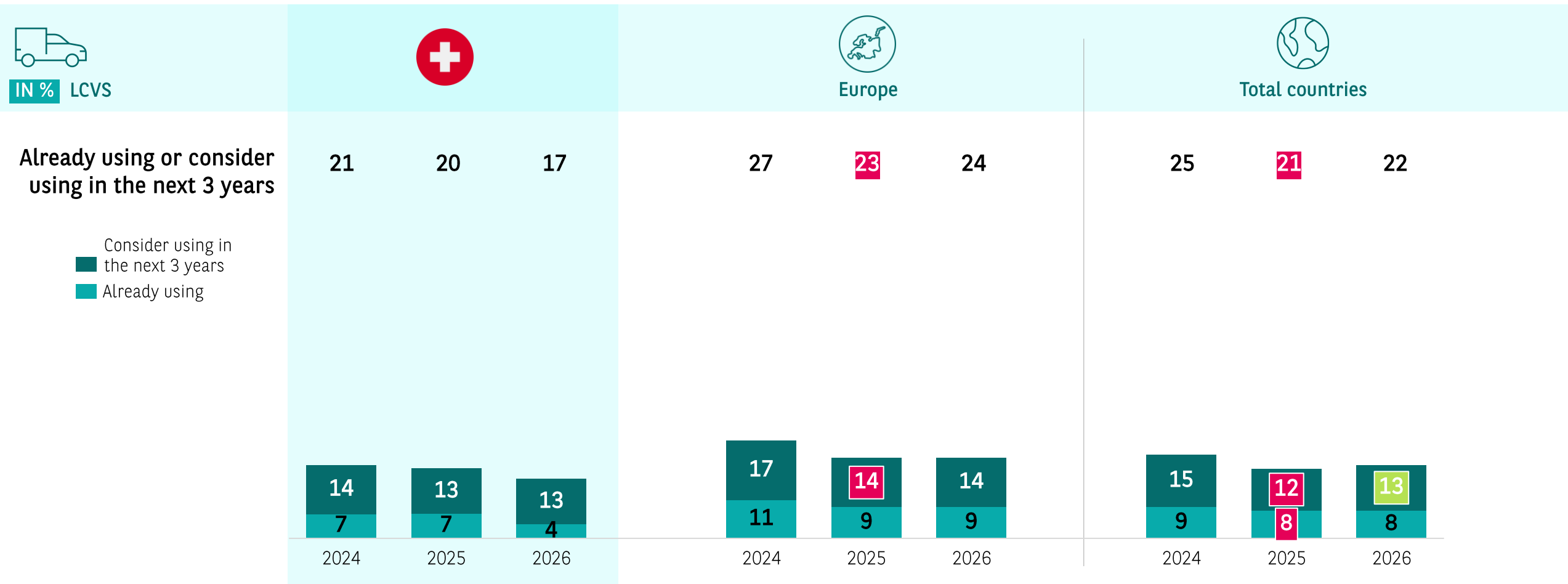
X% Significantly higher / lower vs. previous wave

ELECTRIFIED VEHICLES TECHNOLOGIES USAGE

FOCUS ON BEV

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 17% of the companies with LCVs are already using BEV or are considering doing so in the next 3 years.



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

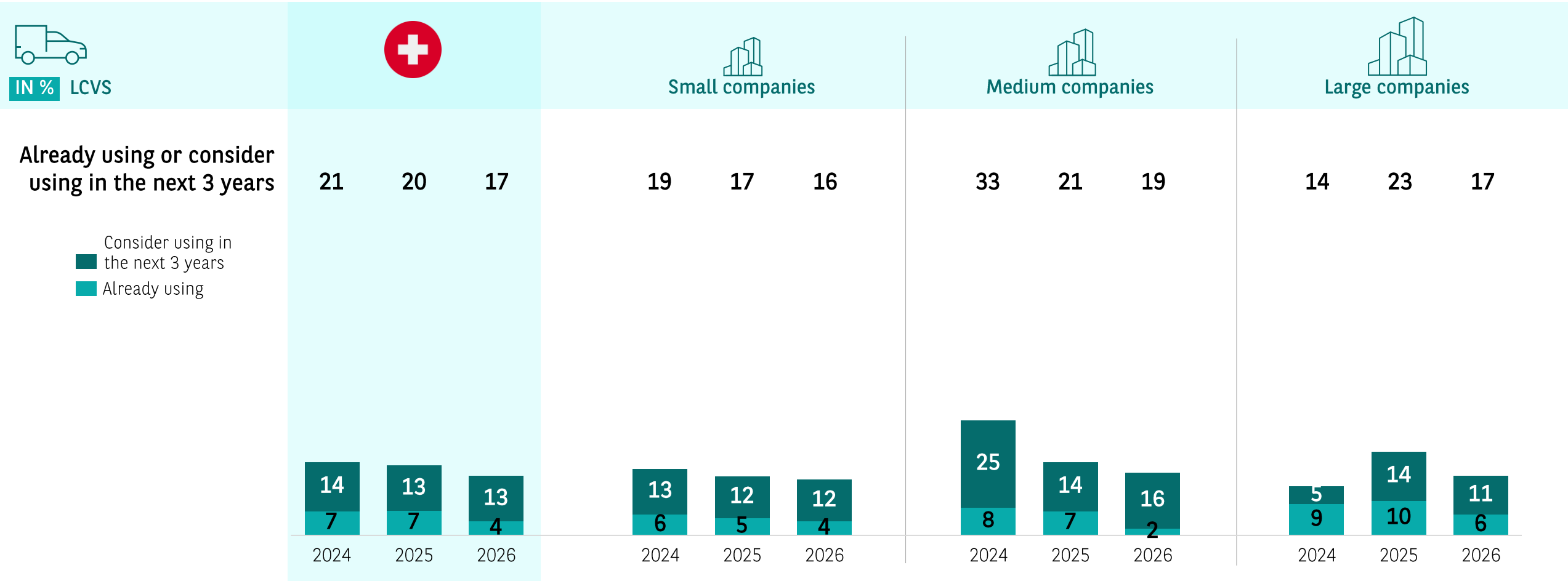
X% Significantly higher / lower vs. previous wave

ELECTRIFIED VEHICLES TECHNOLOGIES USAGE

FOCUS ON BEV

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 17% of the companies with LCVs are already using BEV or are considering doing so in the next 3 years.



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

X% Significantly higher / lower vs. previous wave

ELECTRIFIED VEHICLES TECHNOLOGIES USAGE

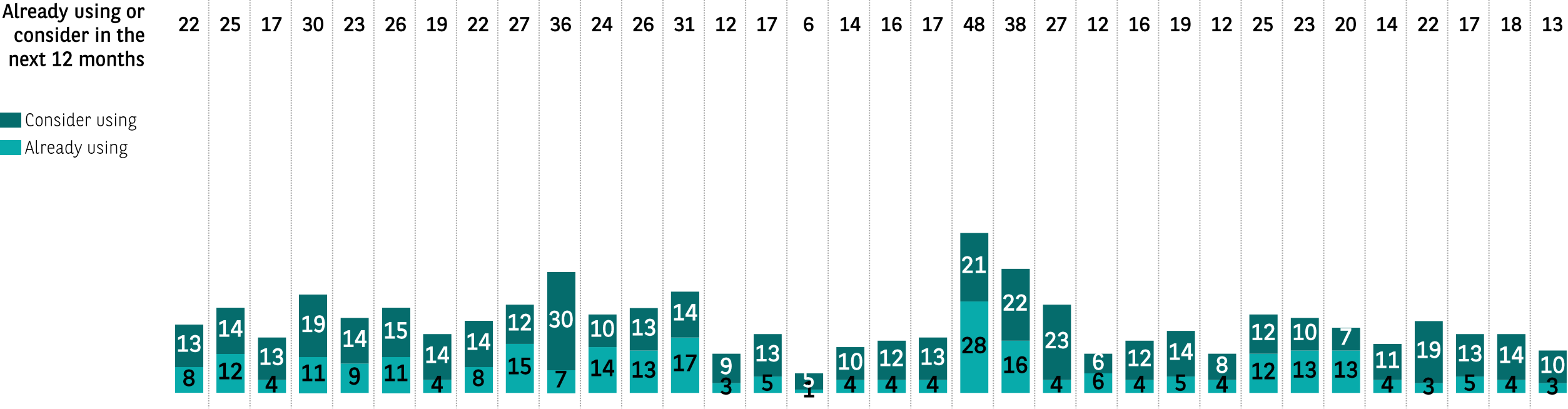
FOCUS ON BEV

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 17% of the companies with LCVs are already using BEV or are considering using it in the next three years.



IN % LCVS



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

REASONS FOR IMPLEMENTING ELECTRIFIED VEHICLES TECHNOLOGIES FOR LCVs

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 40% of the companies with LCVs are already using electrified vehicles technologies or are considering it To reduce fuel expenses.



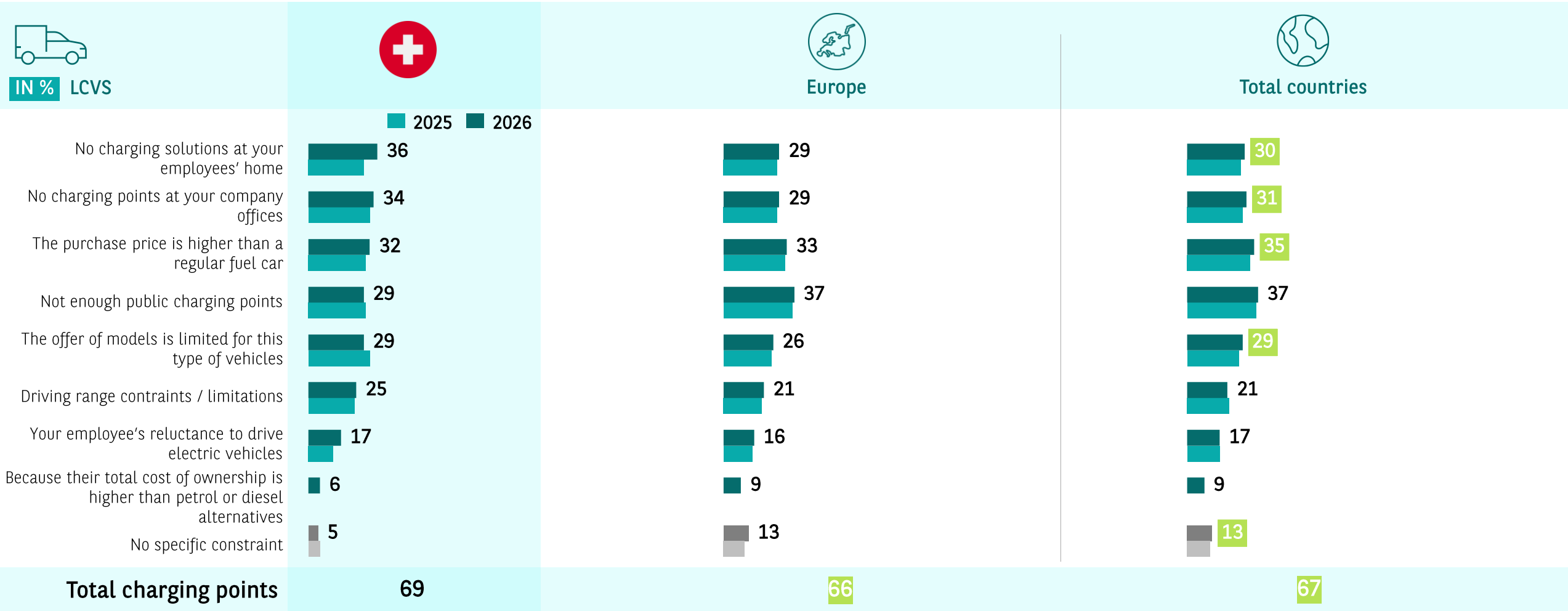
E28A. Why have you already implemented or why do you consider implementing these electrified vehicles technologies?
Basis: companies that are already using or considering using electrified vehicles technologies for LCVs

X% Significantly higher / lower vs. previous wave

CONSTRAINTS FOR USING ELECTRIC LIGHT COMMERCIAL VEHICLES

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 36% of the companies with LCVs declare that the main constraint for using electric LCVs is: No charging solutions at your employees' home. And 69% of the companies mention at least one reason related to charging points.



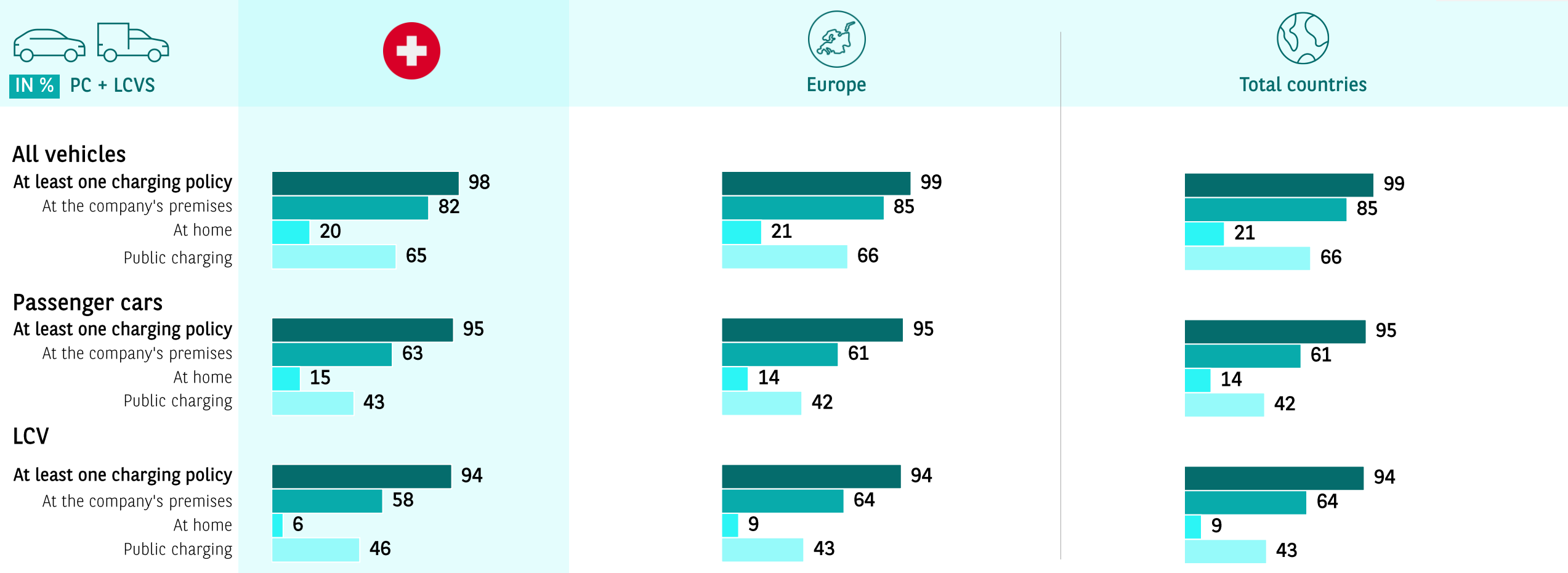
E28B_2. What are the constraints of using electric light commercial vehicles (Battery Electric Vehicles)?
Basis: companies with LCVs and aware of EV technology

X% Significantly higher / lower vs. previous wave

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 98% of the companies have at least one charging policy or will have in the future for all vehicles.

New question

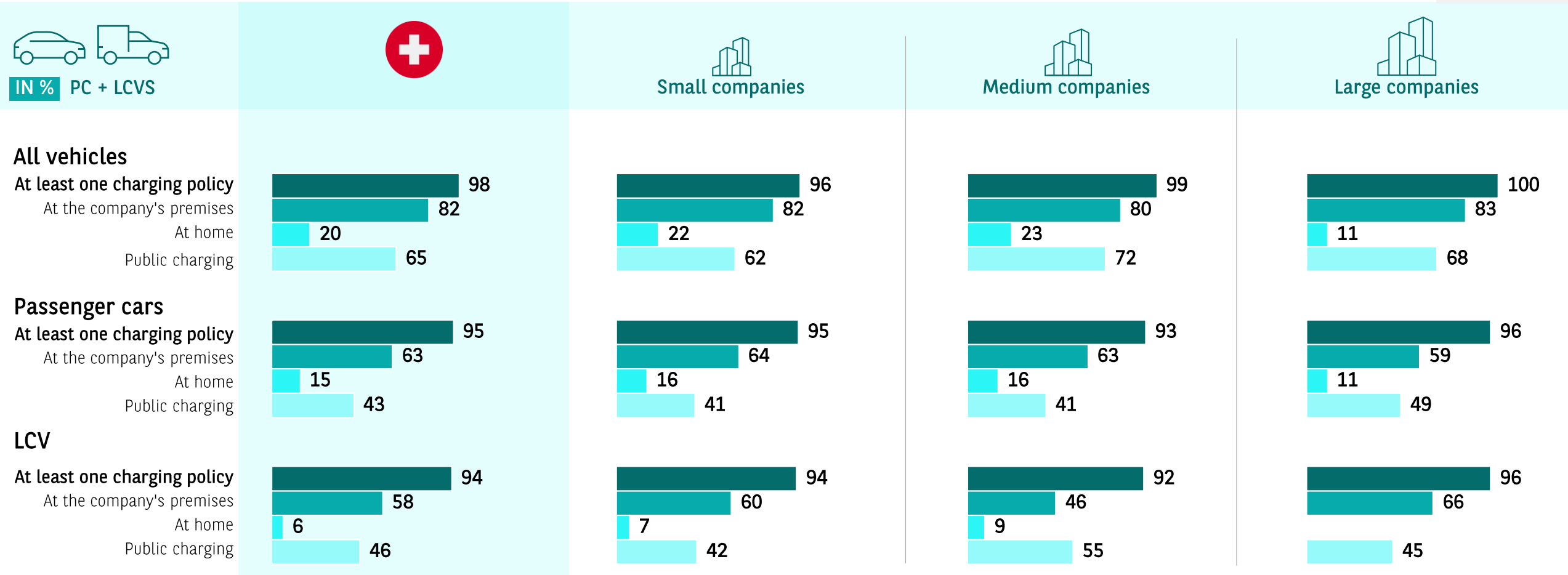


E31. What charging policy does your company currently use, or what policy will it use in the future?
Basis: companies with corporate vehicles = 100%

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 98% of the companies have at least one charging policy or will have in the future for all vehicles.

New question



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

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 98% of the companies have at least one charging policy or will have in the future for all vehicles.

New question





IN %

PC + LCVS

W

AT

CH

DE

ES

FR

GR

IT

PT

UK

BE

LU

NL

CZ

PL

SK

RO

DK

FI

NO

SE

MA

TR

BR

CL

PE

US

CA

MX

AU

NZ

IN

ID

TH

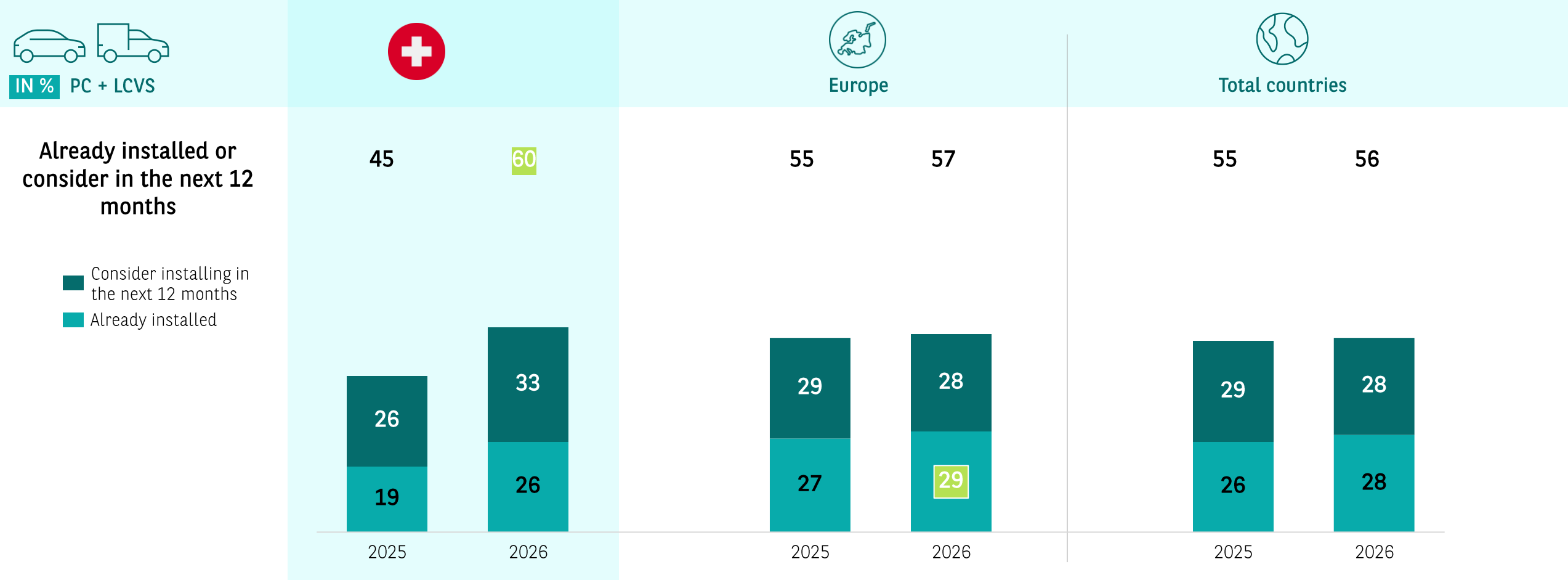
All vehicles																																		
At least one policy	99	99	98	100	99	99	93	98	99	100	100	98	99	98	99	100	96	100	99	100	99	100	99	99	99	100	100	100	99	100	100	100	98	95
At the company's premises	85	83	82	85	83	86	79	82	85	89	87	86	85	86	89	86	81	88	88	84	84	86	83	83	84	81	88	85	84	86	86	88	85	80
At home	21	22	20	21	18	19	23	26	23	18	18	21	25	20	19	22	23	23	18	21	18	19	21	22	17	17	23	26	18	22	18	21	21	18
Public charging	66	67	65	73	69	63	62	64	64	69	70	65	66	60	66	67	68	63	63	68	60	64	66	65	60	69	69	62	71	67	66	69	64	65
Passenger cars																																		
At least one policy	95	96	95	95	96	96	88	93	98	96	94	95	95	94	97	95	93	97	97	94	97	95	95	94	96	96	96	98	93	97	95	95	94	91
At the company's premises	61	60	63	59	62	61	51	60	59	67	58	64	60	60	61	58	56	64	66	57	65	64	60	60	61	58	63	63	59	60	60	60	61	57
At home	14	13	15	13	11	11	16	14	16	12	13	15	19	15	12	15	18	14	11	14	12	11	14	17	10	13	15	17	13	15	12	14	11	11
Public charging	42	43	43	45	44	42	39	46	41	42	46	38	46	40	40	42	43	40	38	42	38	40	41	44	42	42	43	38	40	47	40	42	39	43
LCV																																		
At least one policy	94	94	94	95	94	92	90	93	93	94	95	93	94	92	96	95	92	95	94	96	93	95	95	94	93	93	95	96	93	95	93	96	94	93
At the company's premises	64	64	58	61	62	63	63	61	65	67	70	66	68	69	67	64	62	72	61	61	65	66	61	68	62	61	65	66	60	64	67	66	64	61
At home	9	11	6	10	8	10	11	14	8	9	9	8	9	6	9	7	9	10	9	8	8	10	10	7	8	5	11	11	7	10	6	10	12	10
Public charging	43	46	46	53	48	41	41	42	40	42	47	42	35	36	41	45	45	37	43	46	41	41	41	39	39	50	45	42	48	41	41	45	41	46

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

INSTALLATION OF CHARGING POINTS AT COMPANY'S PREMISES

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 60% of the companies that are using or considering charging at the company's premises have already installed charging points at the company's premises or are considering doing so in the next 12 months.



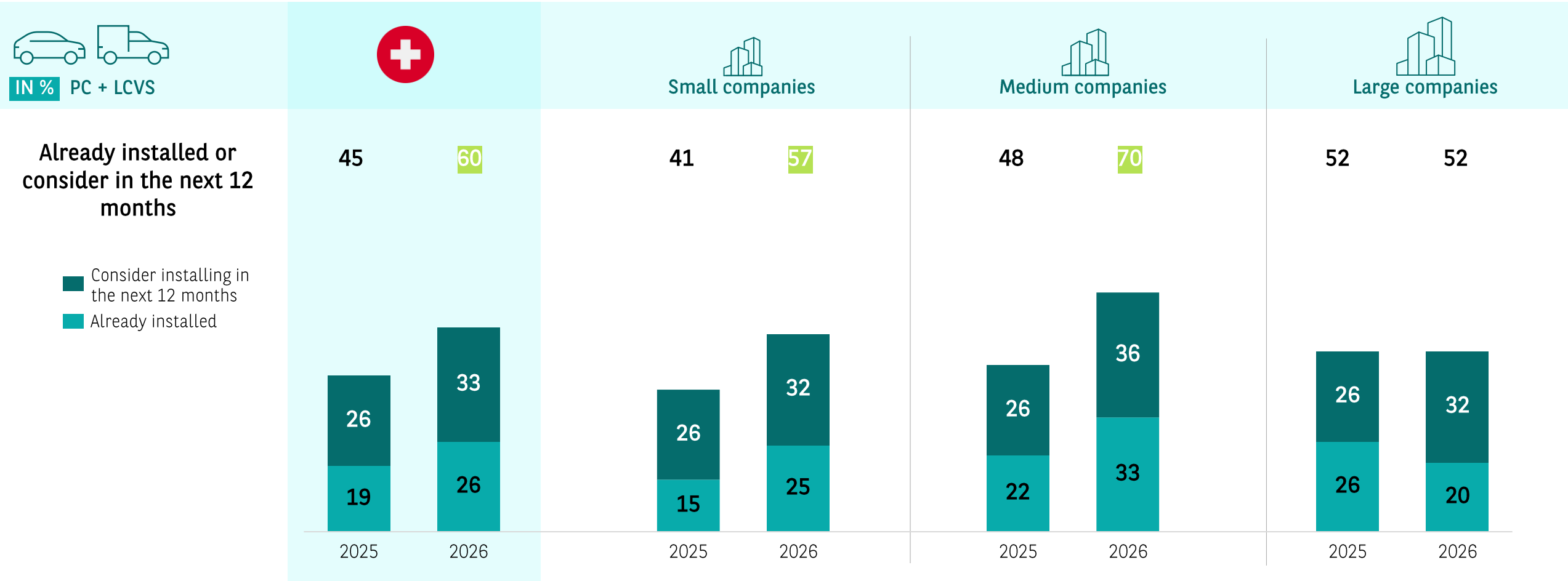
E32. Regarding charging at the company's premises, have you already installed charging points, or are you considering doing so in the next 12 months?
Basis: companies that are using or considering charging at the company's premises for passenger car or LCVs

X% Significantly higher / lower vs. previous wave

INSTALLATION OF CHARGING POINTS AT COMPANY'S PREMISES

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 60% of the companies that are using or considering charging at the company's premises have already installed charging points at the company's premises or are considering doing so in the next 12 months.



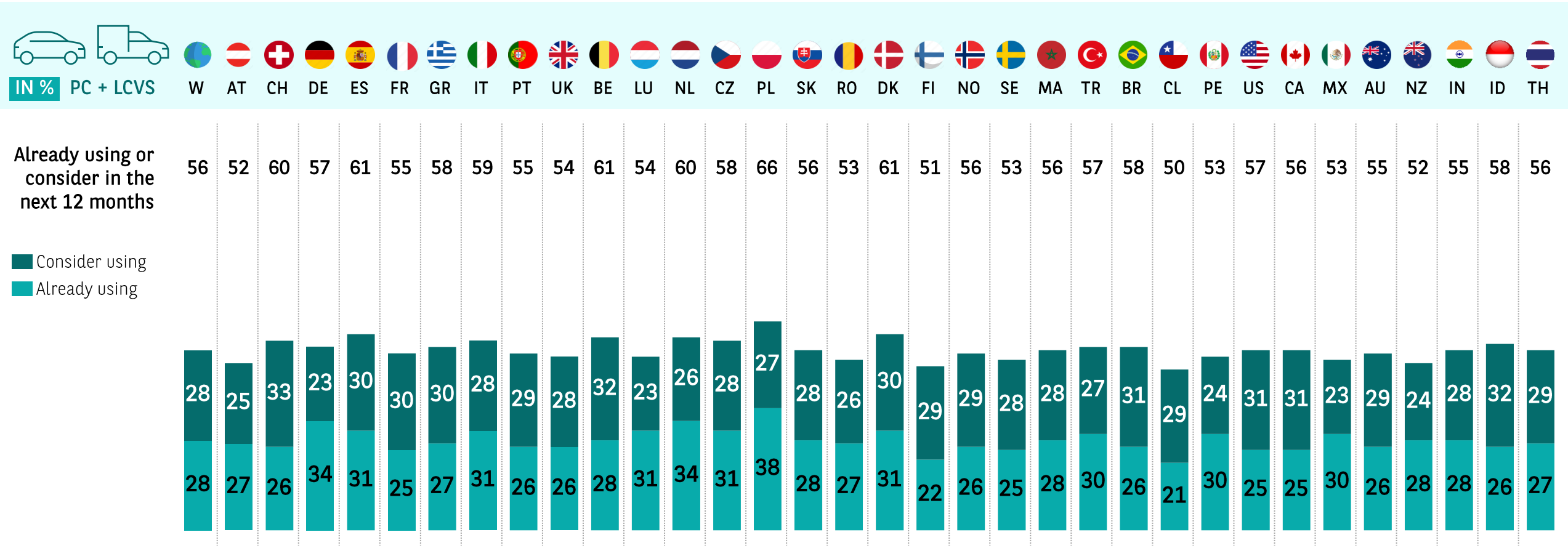
E32. Regarding charging at the company's premises, have you already installed charging points, or are you considering doing so in the next 12 months?
Basis: companies that are using or considering charging at the company's premises for passenger car or LCVs

X% Significantly higher / lower vs. previous wave

INSTALLATION OF CHARGING POINTS AT COMPANY'S PREMISES

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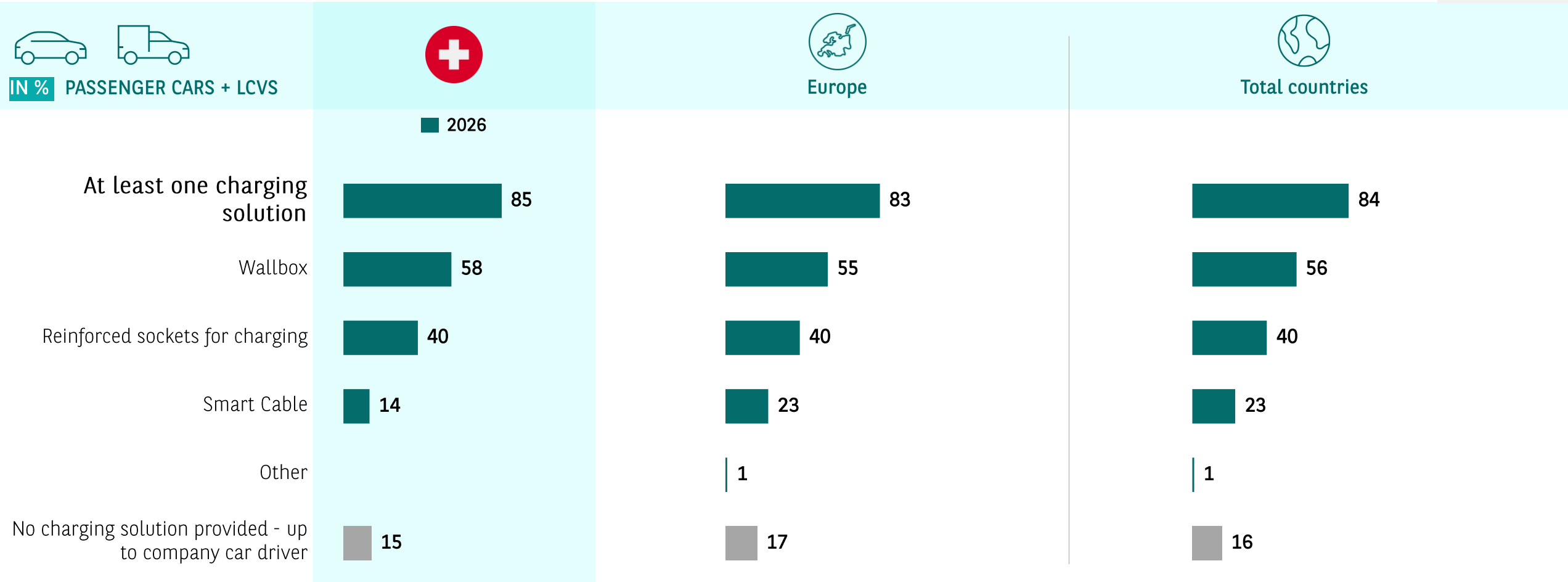
E32. Regarding charging at the company's premises, have you already installed charging points, or are you considering doing so in the next 12 months?
Basis: companies that are using or considering charging at the company's premises for passenger car or LCVs

TYPE OF HOME CHARGING POINTS

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 85% of the companies that are using or considering home charging offer or plan to offer at least one charging solution to company drivers.

New question



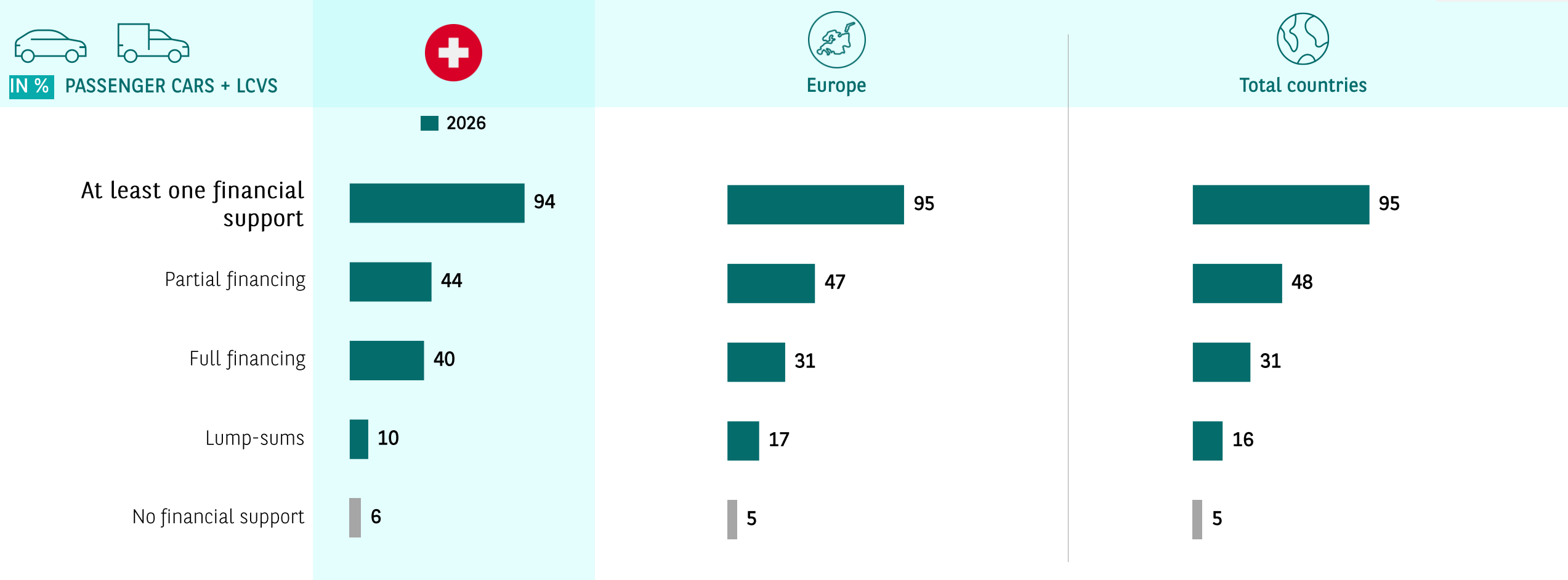
E34.NEW. Regarding home charging, what kind of home charging solutions does your company offer or plan to offer for the company car drivers?
Basis: companies that are using or considering home charging for passenger car or LCVs

TYPE OF FINANCIAL SUPPORT FOR HOME CHARGING POINTS

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 94% of the companies that offer or plan to offer at least one charging solution to company drivers, provide at least one solution to support the provision of home charging solutions to company car drivers or plans to do so in the next 12 months.

New question

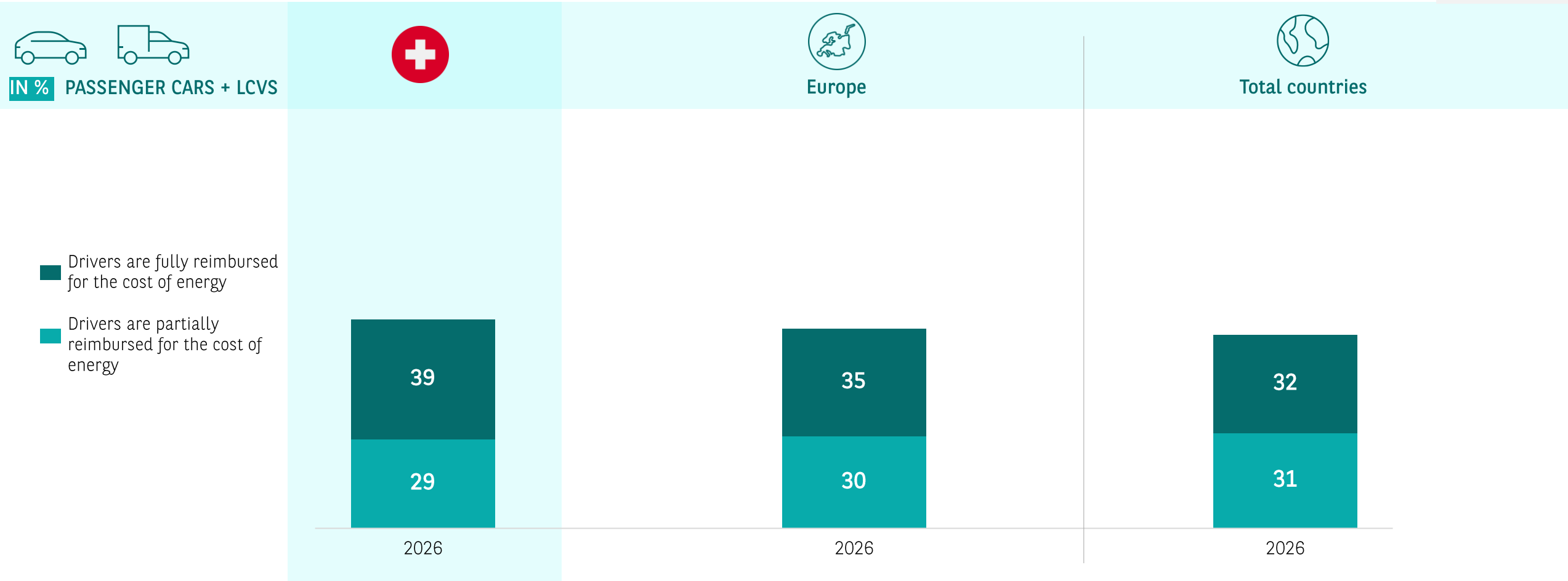


E35.NEW. How does your company financially support the provision of home charging solutions to company car drivers, or plans to do so in the next 12 months?
Basis: companies that offer or plan to offer at least one charging solution to company drivers

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 39% of the companies that are already financially supporting or are considering financially supporting home charging points, fully reimburse drivers for the cost of energy, or plan doing so.

New question

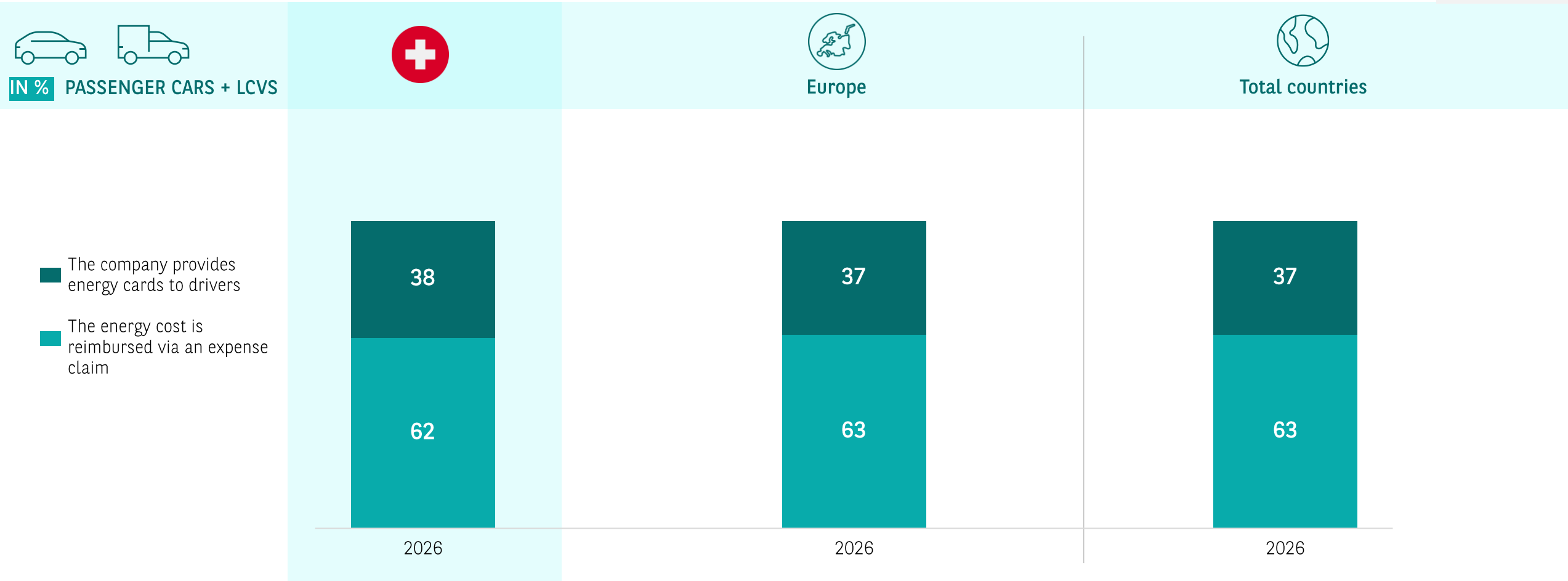


E36. How do you manage or plan to manage the energy costs of home charging for company car drivers?
Basis: companies that are already financially supporting or are considering financially supporting home charging points

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 38% of the companies that are using or considering public charging provide energy cards to drivers.

New question



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

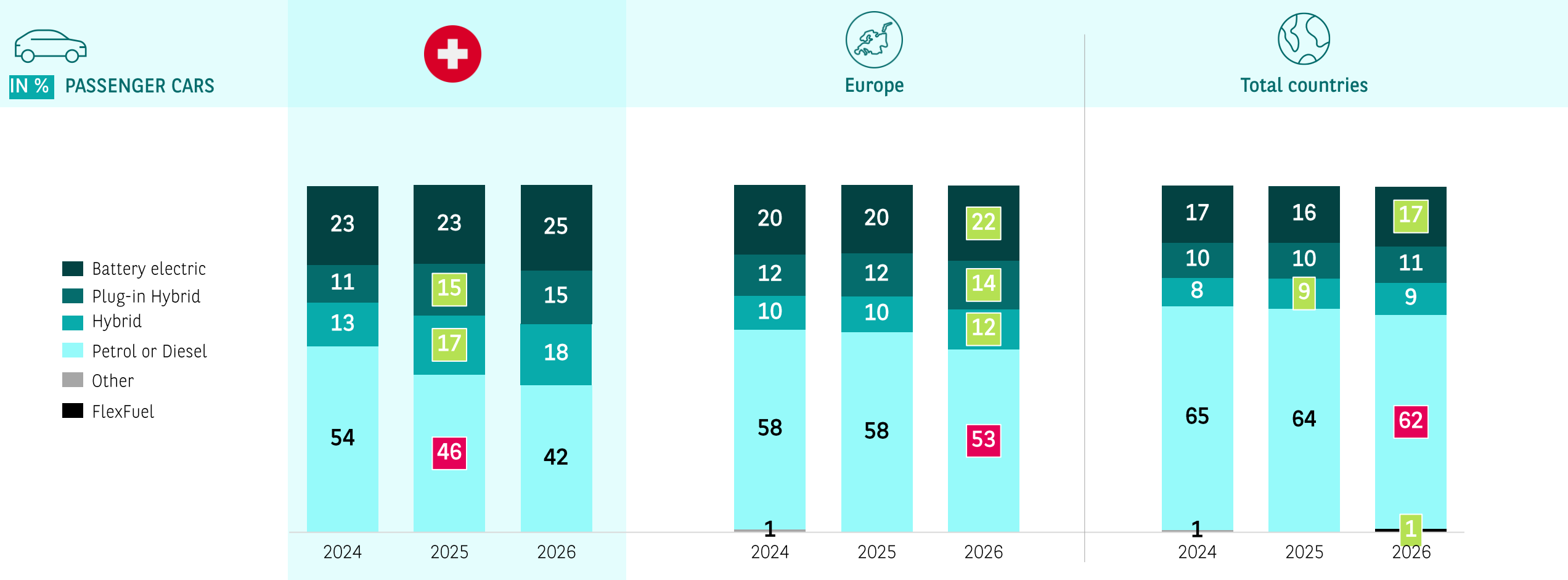
EXPECTED FLEET SHARE PER ENERGY

FOCUS ON PASSENGER CARS

HOW TO READ THE RESULTS ?

In Switzerland in 3 years, 25% of the passenger car fleet is expected to be BEV.

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



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

X% Significantly higher / lower vs. previous wave

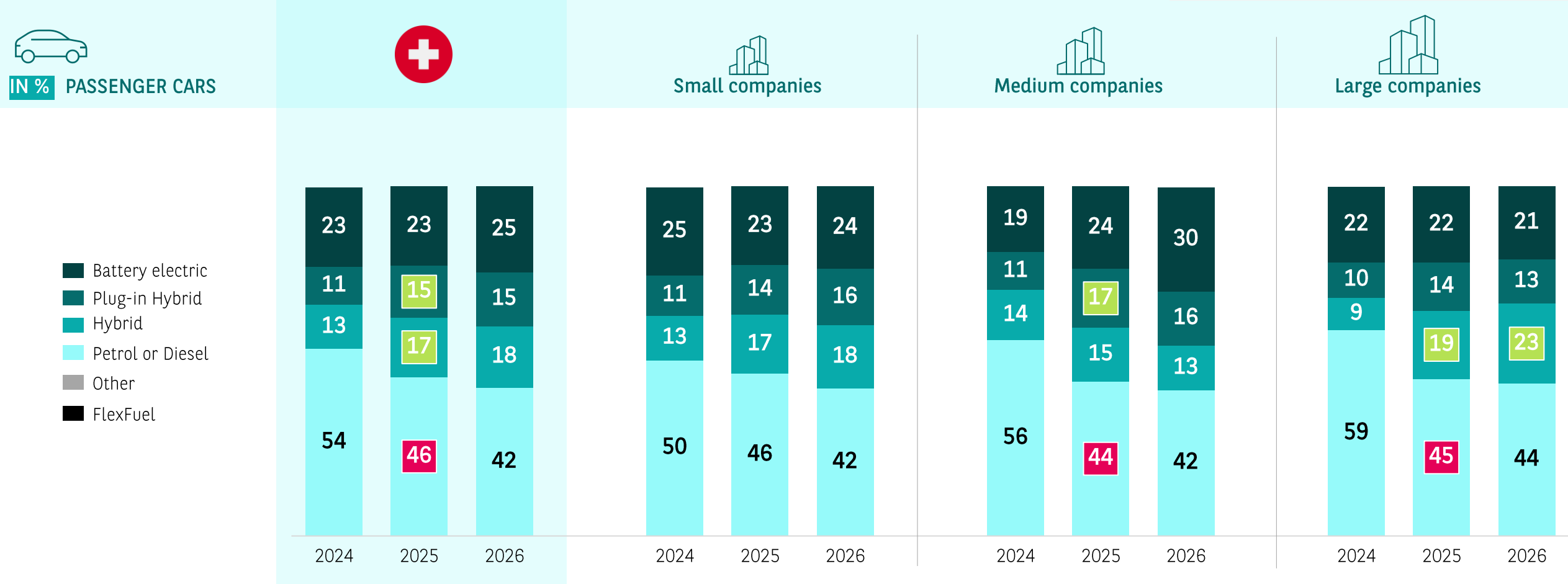
EXPECTED FLEET SHARE PER ENERGY

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EXPECTED FLEET SHARE PER ENERGY

FOCUS ON PASSENGER CARS

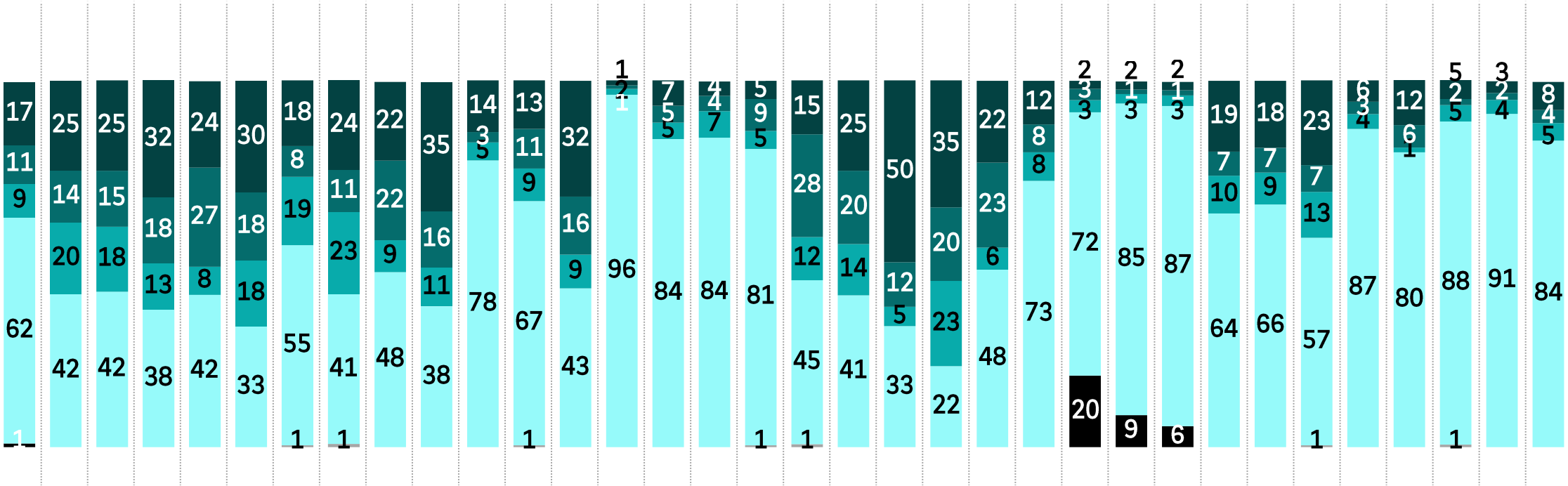
HOW TO READ THE RESULTS ?

In Switzerland in 3 years, 25% of the passenger car fleet is expected to be BEV.

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



IN % PC



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

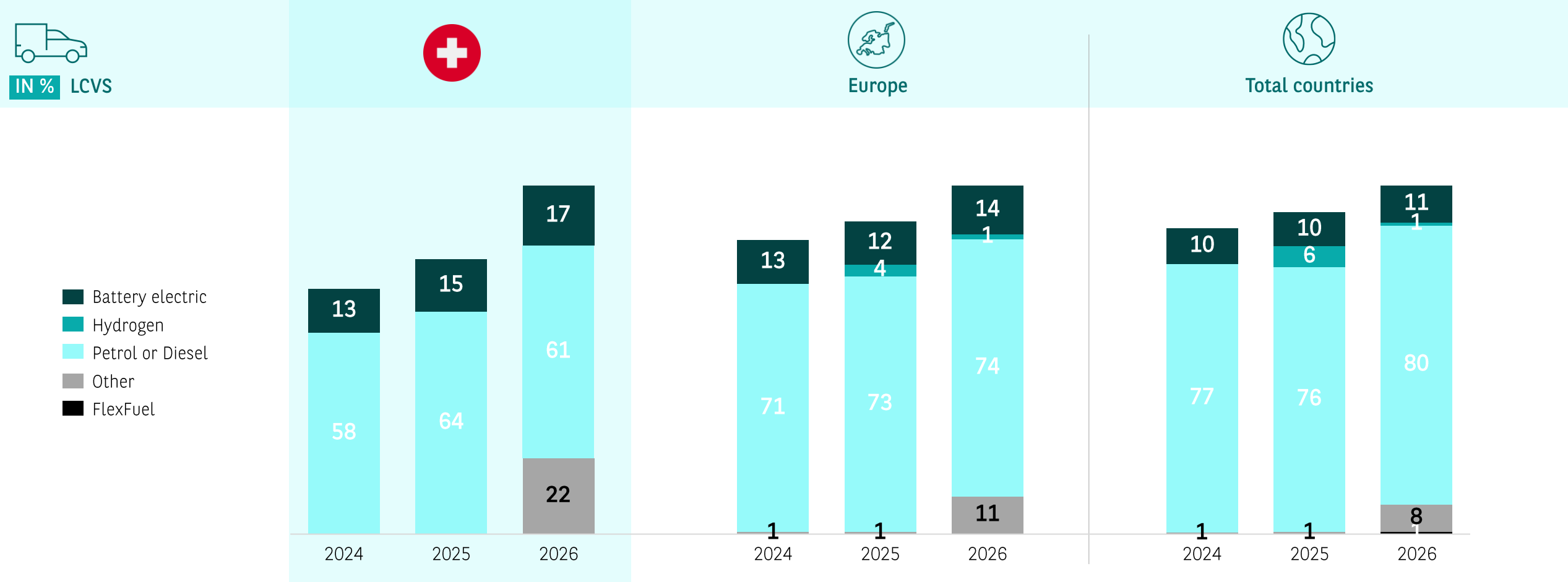
EXPECTED FLEET SHARE PER ENERGY

FOCUS ON LCVs

HOW TO READ THE RESULTS ?

In Switzerland in 3 years, 17% of the LCV fleet is expected to be BEV.

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



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

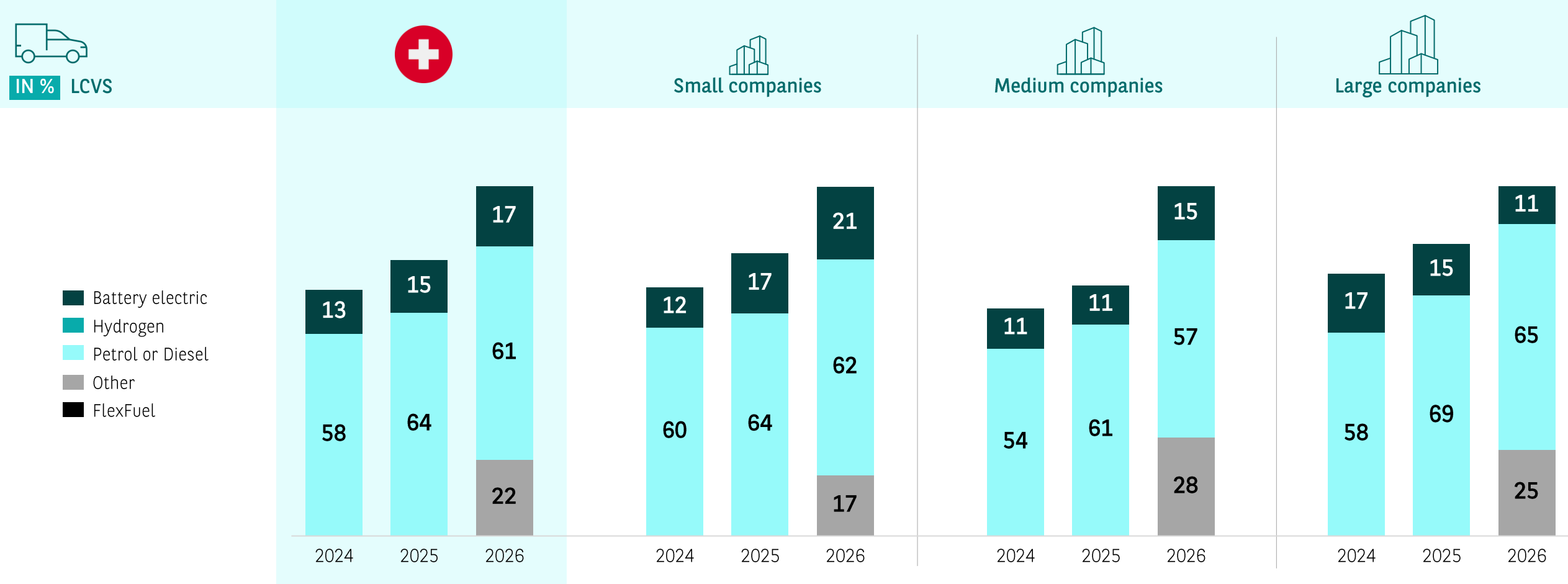
EXPECTED FLEET SHARE PER ENERGY

FOCUS ON LCVs

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Basis: companies with LCVs

EXPECTED FLEET SHARE PER ENERGY

FOCUS ON LCVs

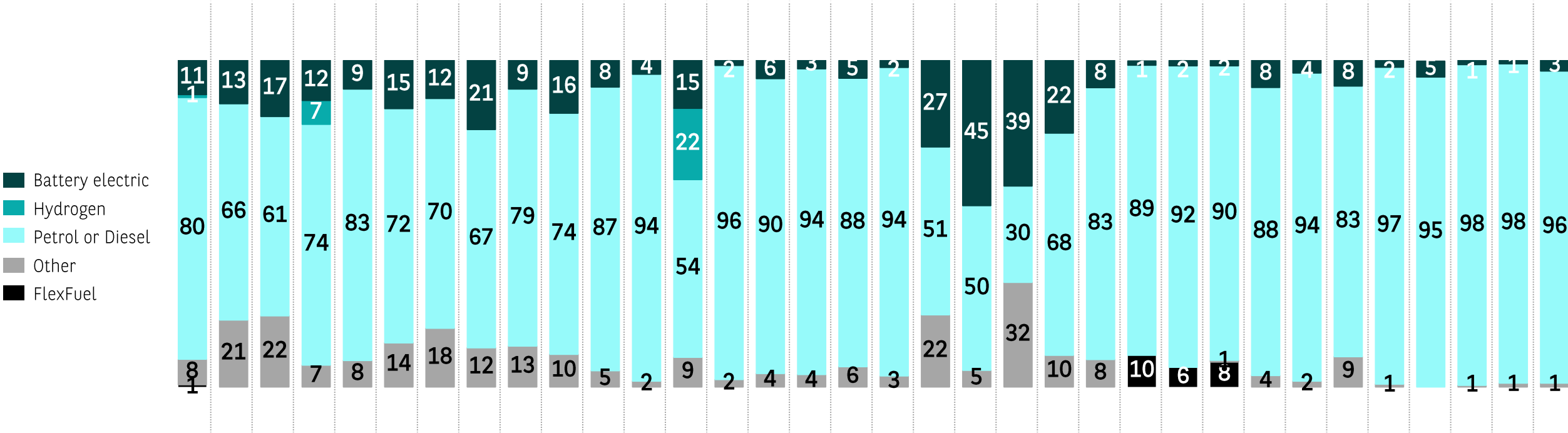
HOW TO READ THE RESULTS ?

In Switzerland in 3 years, 17% of the LCV fleet is expected to be BEV.

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IN % LCVs

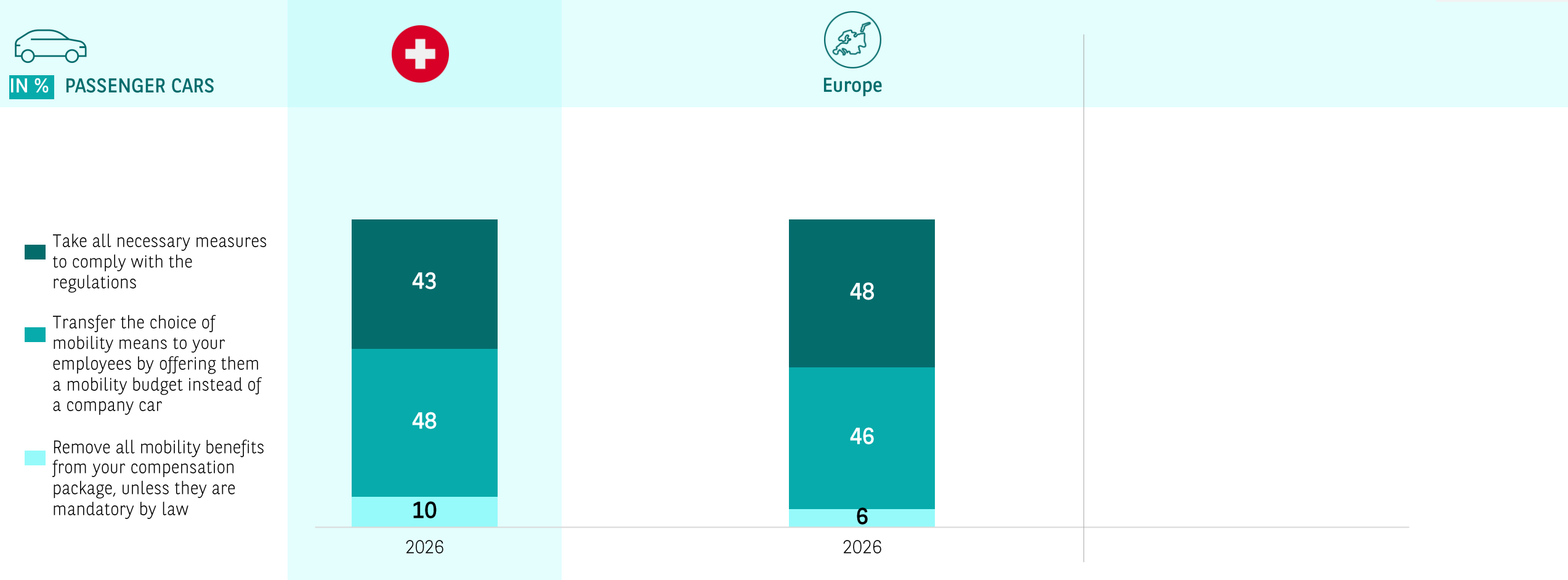


A53. What percentage of your LCV fleet do you expect to be: battery electric, petrol or diesel or Hydrogen fuel cell vehicles in 3 years?
Basis: companies with LCVs

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 43% of the companies with passenger cars would take all necessary measures to comply with the regulations, if regulations required them to switch their fleet of passenger company cars exclusively to battery electric vehicles (BEVs) by 2030 at the latest.

New question

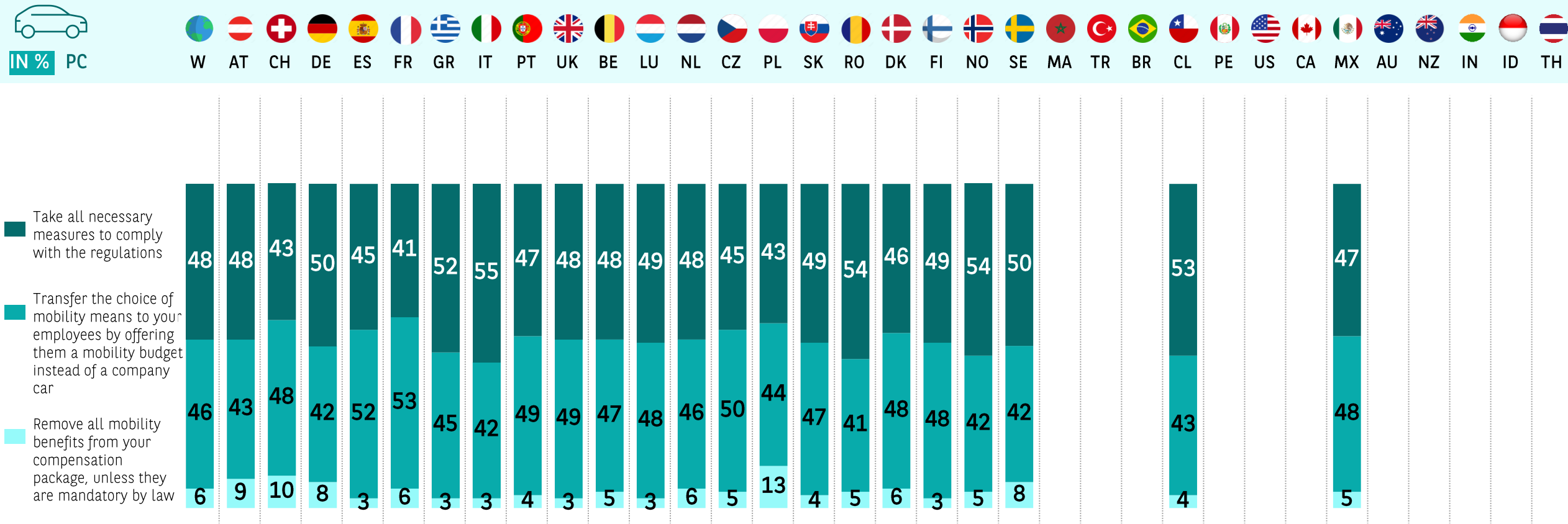


E38. What would you do if regulations required you to switch your fleet of passenger company cars exclusively to battery electric vehicles (BEVs) by 2030 at the latest?
Basis: companies with passenger cars

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 43% of the companies with passenger cars would take all necessary measures to comply with the regulations, if regulations required them to switch their fleet of passenger company cars exclusively to battery electric vehicles (BEVs) by 2030 at the latest.

New question



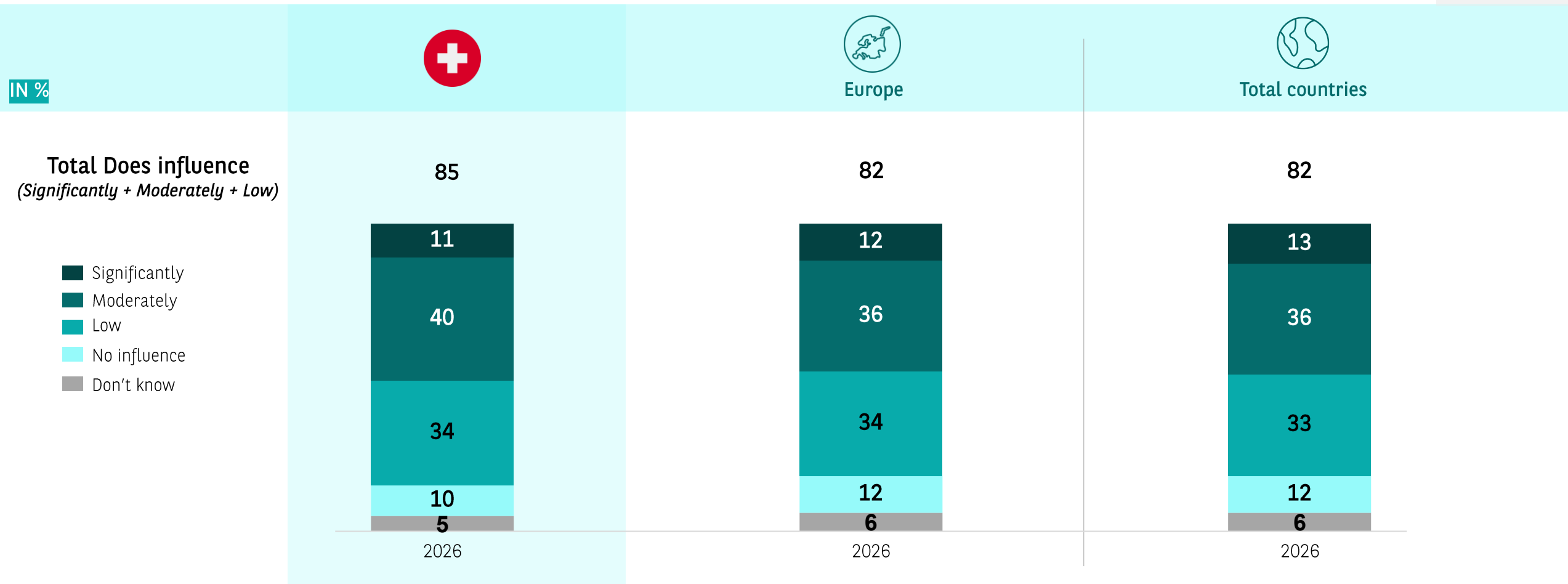
E38. What would you do if regulations required you to switch your fleet of passenger company cars exclusively to battery electric vehicles (BEVs) by 2030 at the latest?
Basis: companies with passenger cars

INFLUENCE OF LEASING PROVIDER ON ENERGY MIX CHOICES

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 85% of the companies financing their vehicles with full-service leasing or Financial leasing declare that their leasing provider influence their decision to move from a thermic vehicle to an electric vehicle.

New question



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

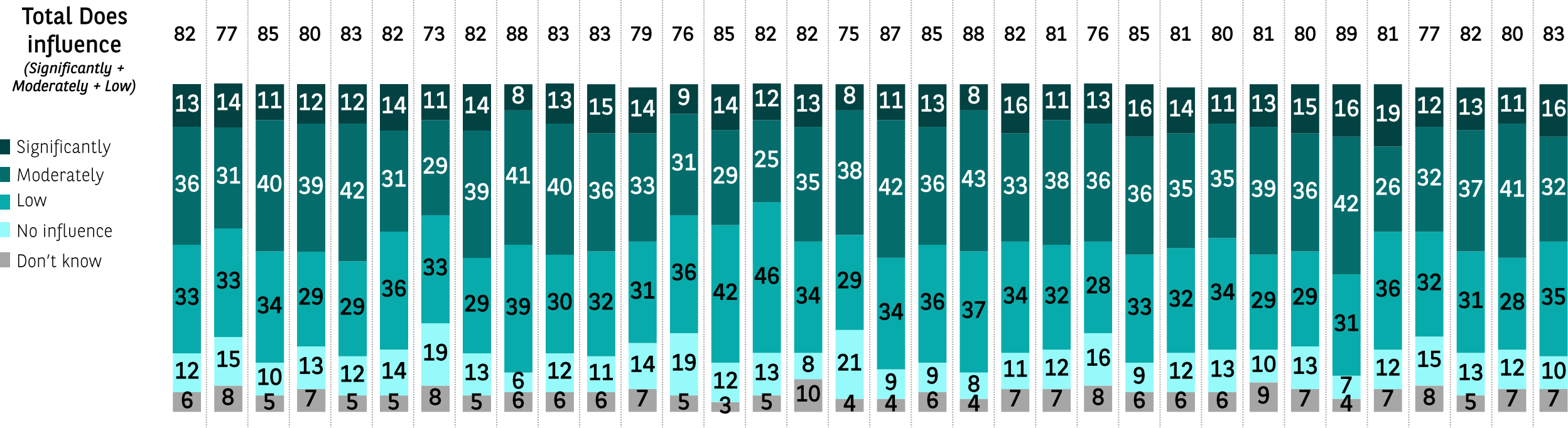
INFLUENCE OF LEASING PROVIDER ON ENERGY MIX CHOICES

HOW TO READ THE RESULTS ?

In 2026, 85% of the companies financing their vehicles with full-service leasing or Financial leasing declare that their leasing provider influence their decision to move from a thermic vehicle to an electric vehicle.

New question

IN %



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

04

CONNECTED FLEETS

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



Stable telematics adoption remains below the European standards

In 2026, 28% of companies in Switzerland have connected vehicles for all or part of their fleet, a steady rate since 2025 and among the lowest in Europe. Telematics usage is comparable between passenger cars (15%) and LCVs (16%).

Notably, small companies (35%) utilize telematics more than medium-sized companies (24%) and large companies (15%).

A limited data usage with some potential

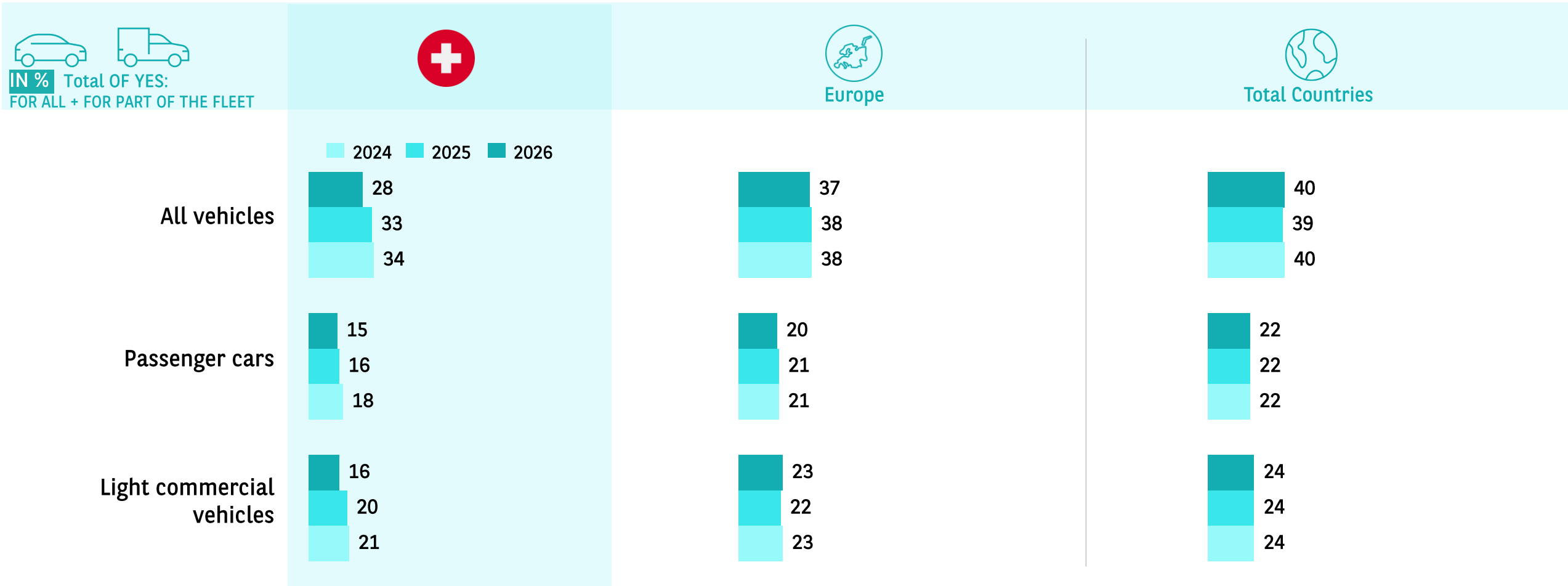
In 2026, 15% of Swiss companies reported using data from telematics platforms, remaining steady over the past two years and aligning with the European average of 16%. Additionally, 39% of companies are still considering leveraging this data, indicating its potential remains.

Data usage is similar between passenger cars (13%) and LCVs (14%).

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 28% of the companies have connected vehicles for all or part of their fleet.
15% have connected passenger cars and 16% have connected LCVs.



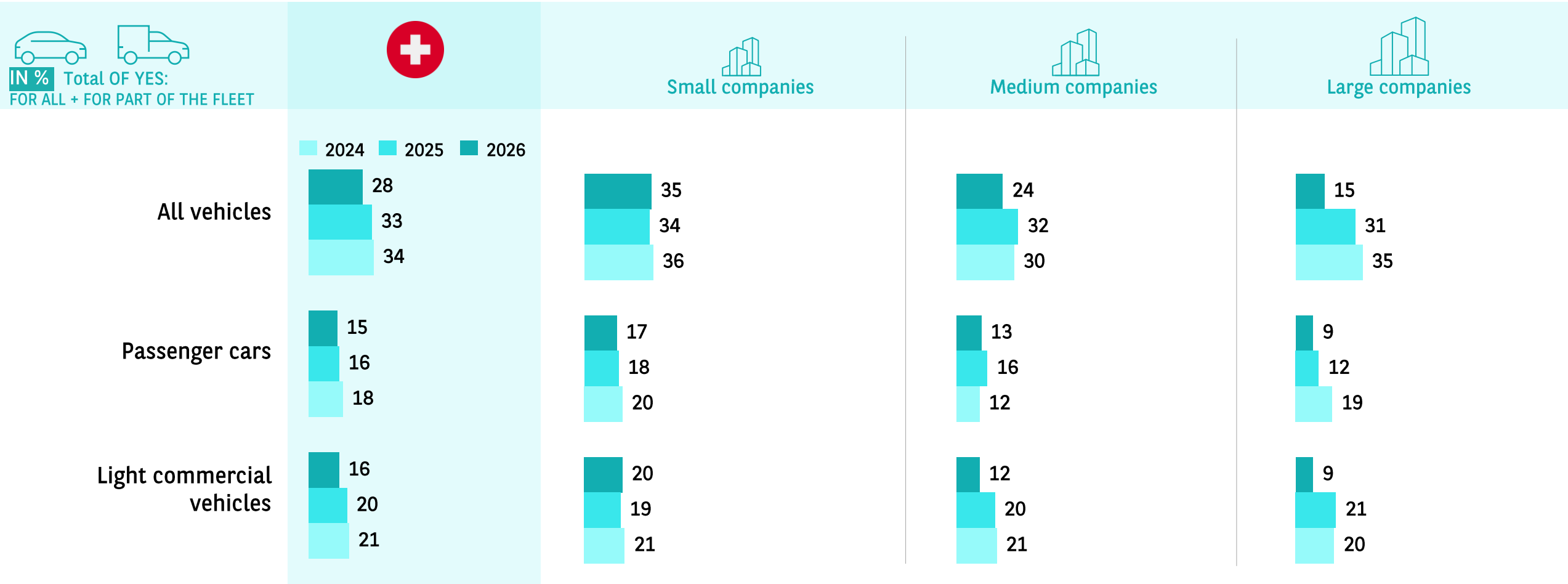
E23c. Is your fleet connected thanks to a telematic tool?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 28% of the companies have connected vehicles for all or part of their fleet.
15% have connected passenger cars and 16% have connected LCVs.



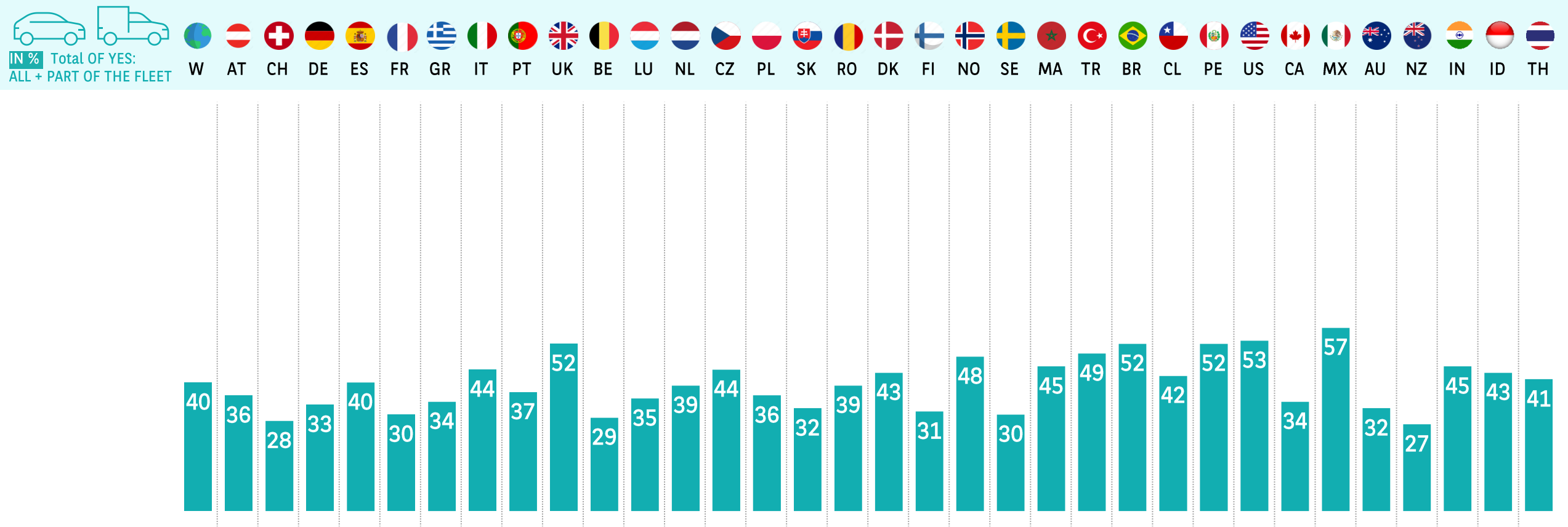
E23c. Is your fleet connected thanks to a telematic tool?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 28% of the companies have connected vehicles for all or part of their fleet.

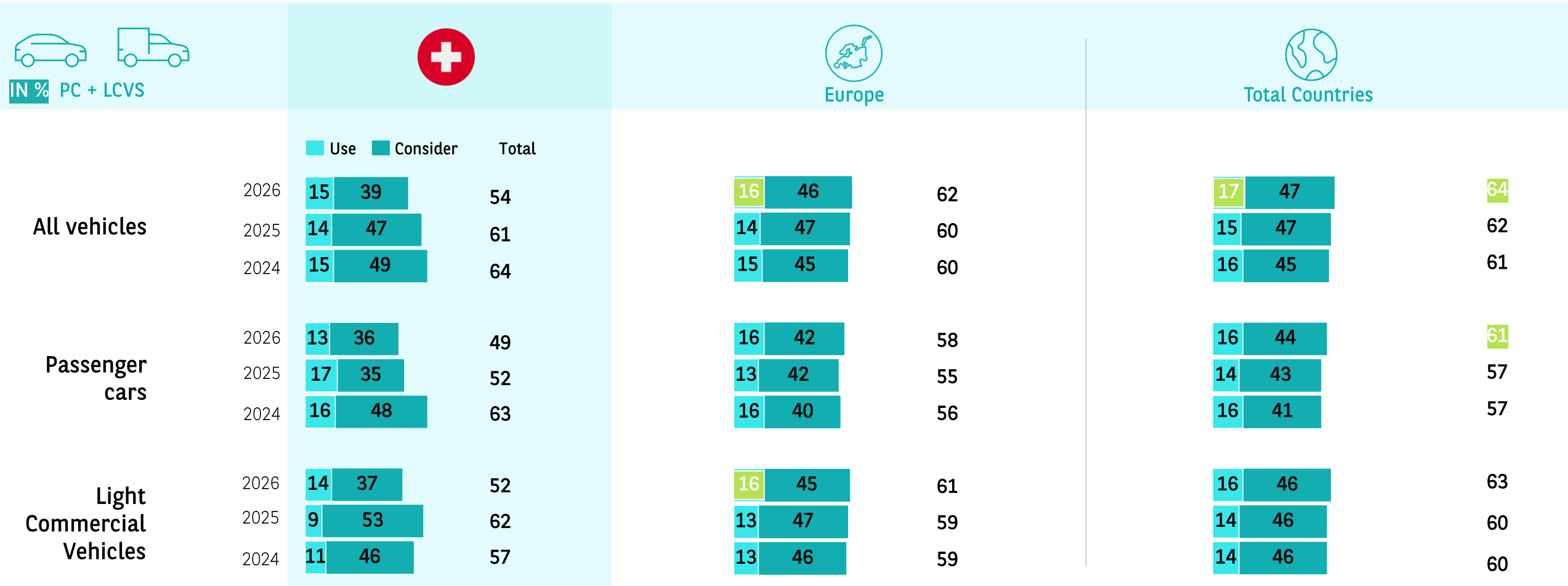


E23c. Is your fleet connected thanks to a telematic tool?
Basis: companies with corporate vehicles = 100%

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 54% of the companies with connected vehicles are already using the data coming from the vehicle box thanks to a telematics platform or are considering doing so in the next 3 years.



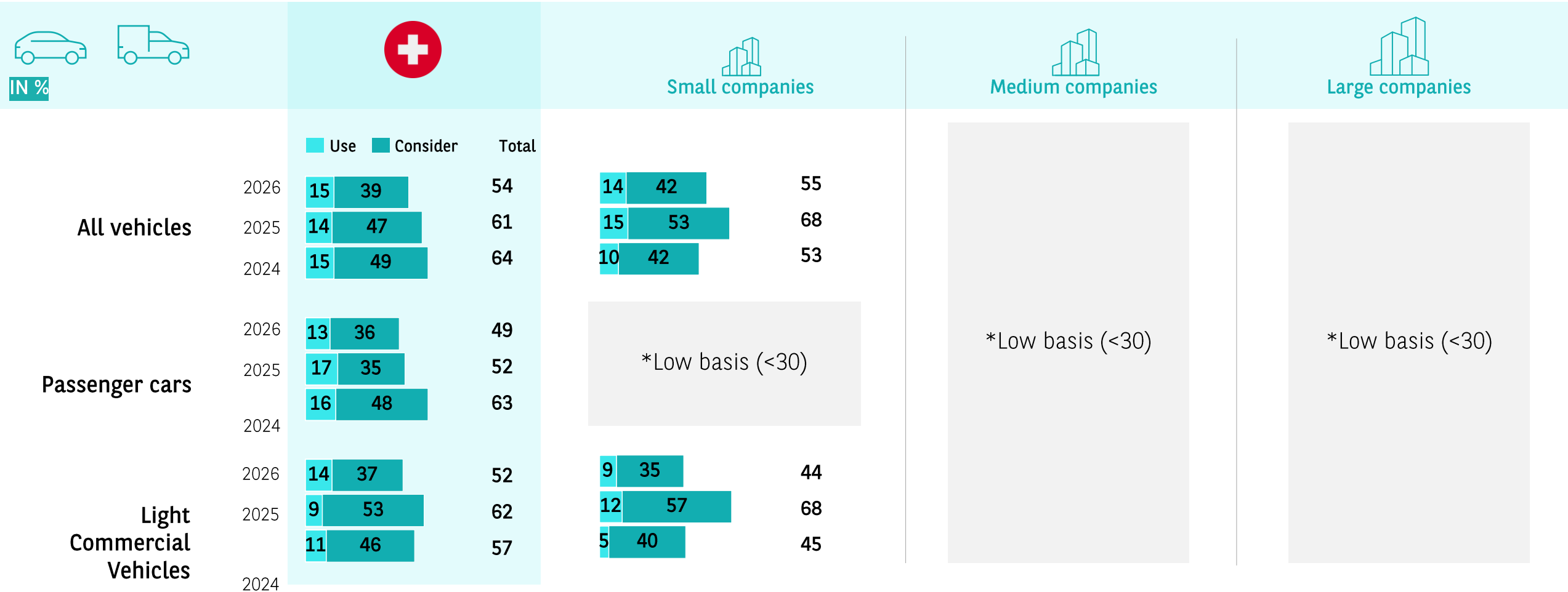
E23d. Do you use or consider using the data coming from the vehicle box thanks to a telematics platform ?
Basis: companies with connected vehicles thanks to a telematic tool

X% Significantly higher / lower vs. previous wave

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 54% of the companies with connected vehicles are already using the data coming from the vehicle box thanks to a telematics platform or are considering doing so in the next 3 years.



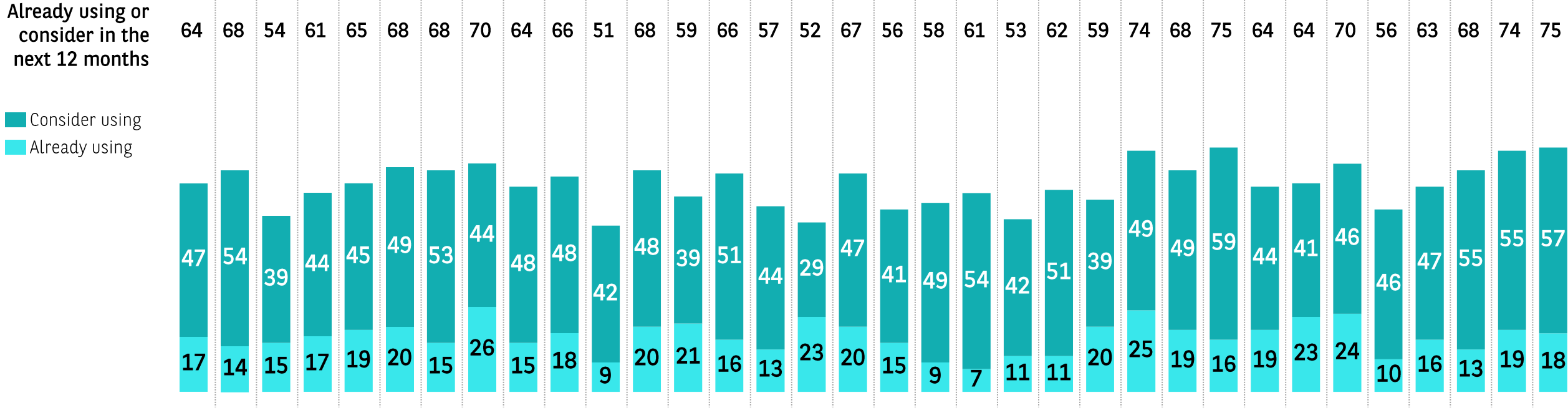
E23d. Do you use or consider using the data coming from the vehicle box thanks to a telematics platform ?
Basis: companies with connected vehicles thanks to a telematic tool

X% Significantly higher / lower vs. previous wave

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 54% 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?



Swiss companies remain committed to implementing corporate mobility policies and solutions

In Switzerland, 94% of companies have implemented or are planning to implement at least one mobility policy or solution, with 78% having already done so. These figures are stable, consistent across company sizes and align with the European average.

Car or cash allowance, public transport reimbursement, and car sharing remain the most common mobility policies and solutions

Car or cash allowance continues to be the leading mobility policy, with 38% of Swiss companies implementing or considering it, compared to 29% at the European average. This is followed by public transport expense reimbursement at 37%, slightly higher than the European average of 33%. These figures are stable.

Car sharing remains the leading mobility solution, with 31% implementation or consideration, compared to the European average of 24%.

Swiss companies explore mobility budgets for flexibility and cost reduction

17% of Swiss companies are implementing or considering mobility budgets, motivated by support for employees' desire for more mobility options and flexibility (67%) and the reduction in mobility costs (54%).

CSR policies and HR-needs continue to drive corporate mobility solutions

In 2026, 44% of Swiss companies are implementing mobility solutions and policies due to CSR considerations, and 41% for HR related needs.

RESPONDENTS' INVOLVEMENT IN MOBILITY SOLUTION DECISIONS

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 84% of the respondents are informed about mobility solutions.

IN %



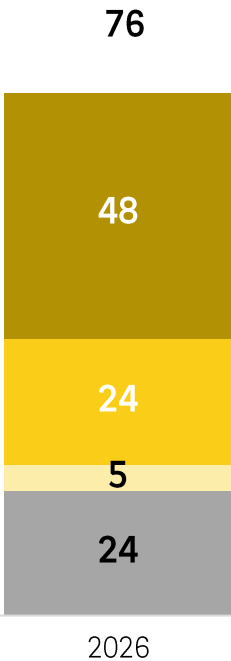
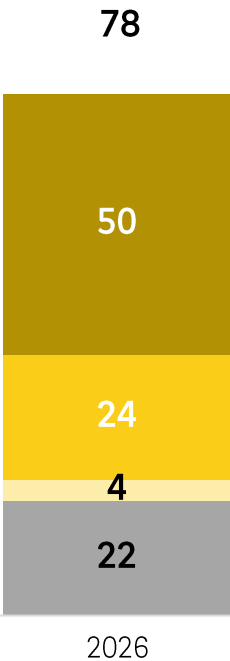
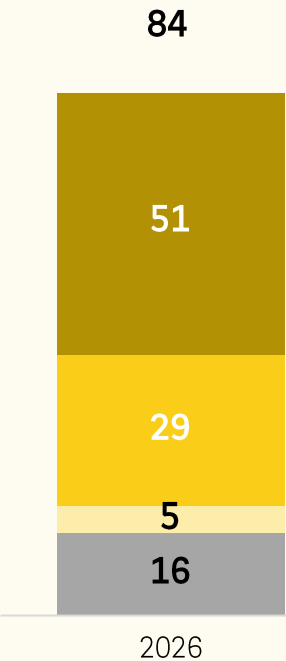
Europe



Total countries

Informed about mobility solutions (Decision maker, influencer or informed)

- Decision maker or a co-decision maker
- Some influence on the decisions but do not decide
- I am not involved in the decision-making process, but I am informed about mobility solutions
- I am not aware of mobility solutions in the company



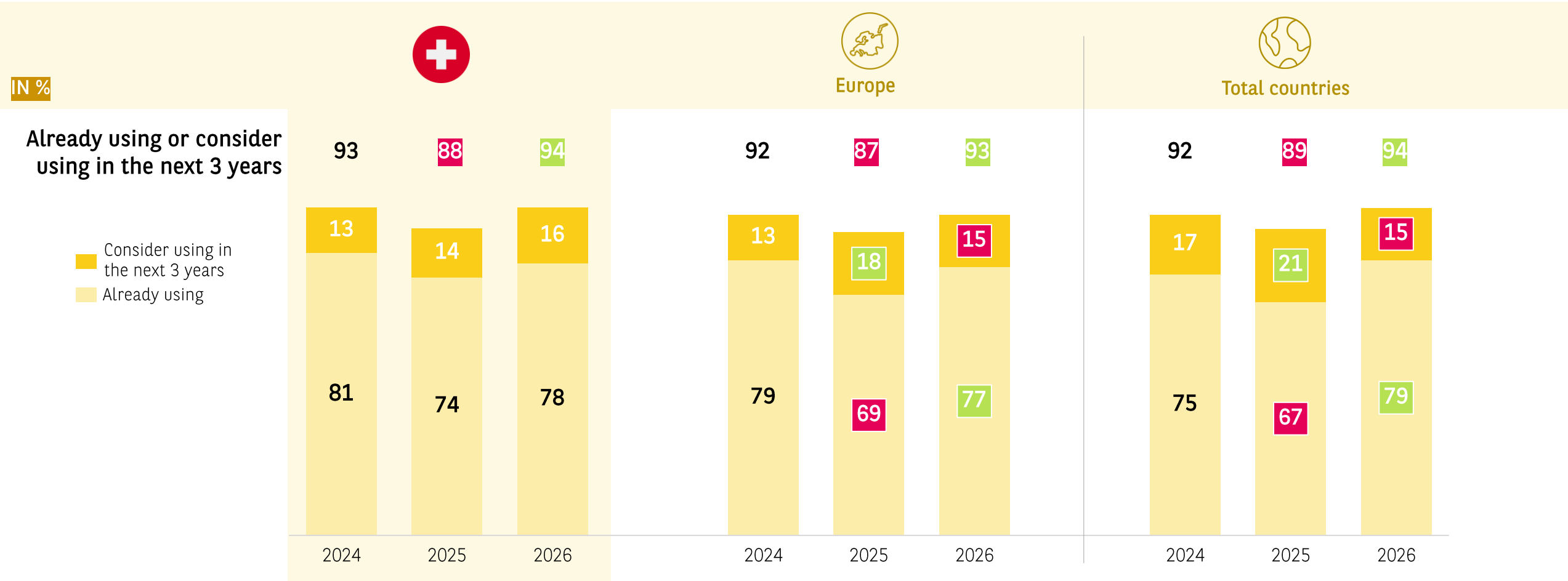
A12. To what extent are you informed about mobility solutions using other modes of transportation than company cars (such as car sharing , bike sharing etc....)?
Basis: companies with corporate vehicles = 100%

MOBILITY POLICIES AND SOLUTIONS IMPLEMENTATION

AT LEAST ONE MOBILITY POLICY AND SOLUTION

HOW TO READ THE RESULTS ?

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



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

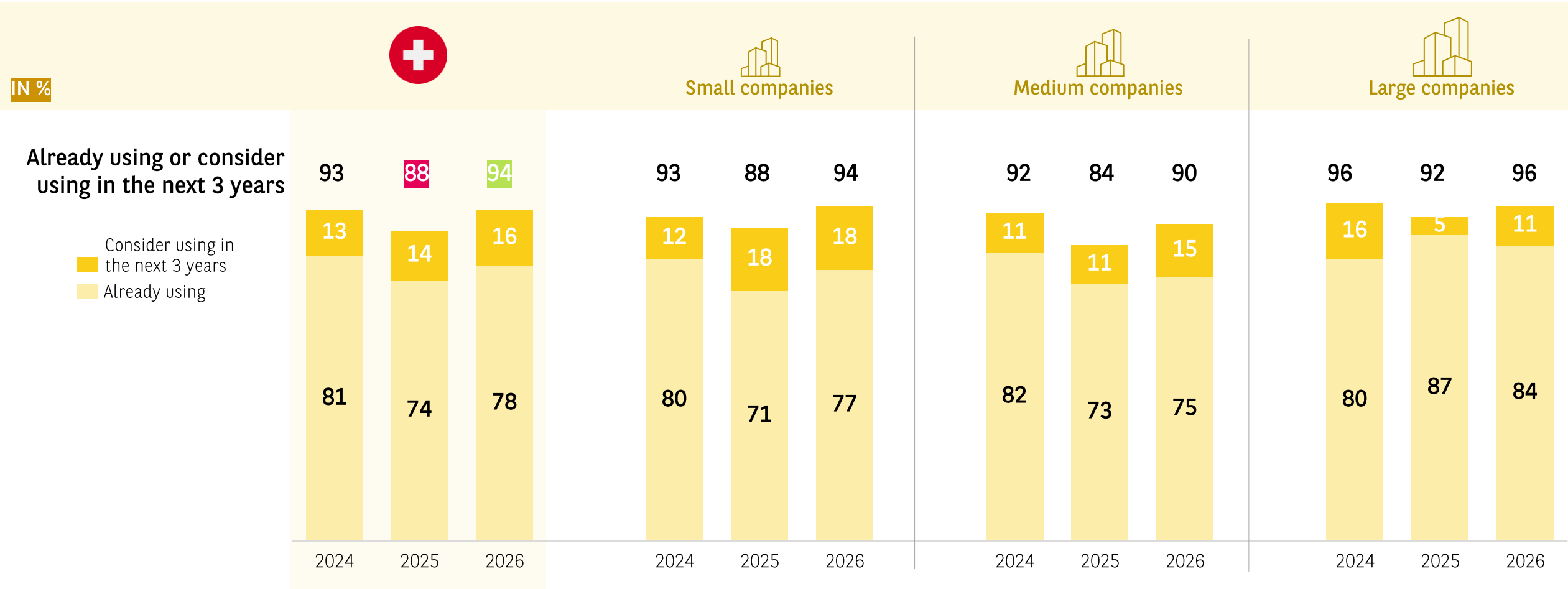
X% Significantly higher / lower vs. previous wave

MOBILITY POLICIES AND SOLUTIONS IMPLEMENTATION

AT LEAST ONE MOBILITY POLICY AND SOLUTION

HOW TO READ THE RESULTS ?

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



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

X% Significantly higher / lower vs. previous wave

MOBILITY POLICIES AND SOLUTIONS IMPLEMENTATION

AT LEAST ONE MOBILITY POLICY AND SOLUTION

HOW TO READ THE RESULTS ?

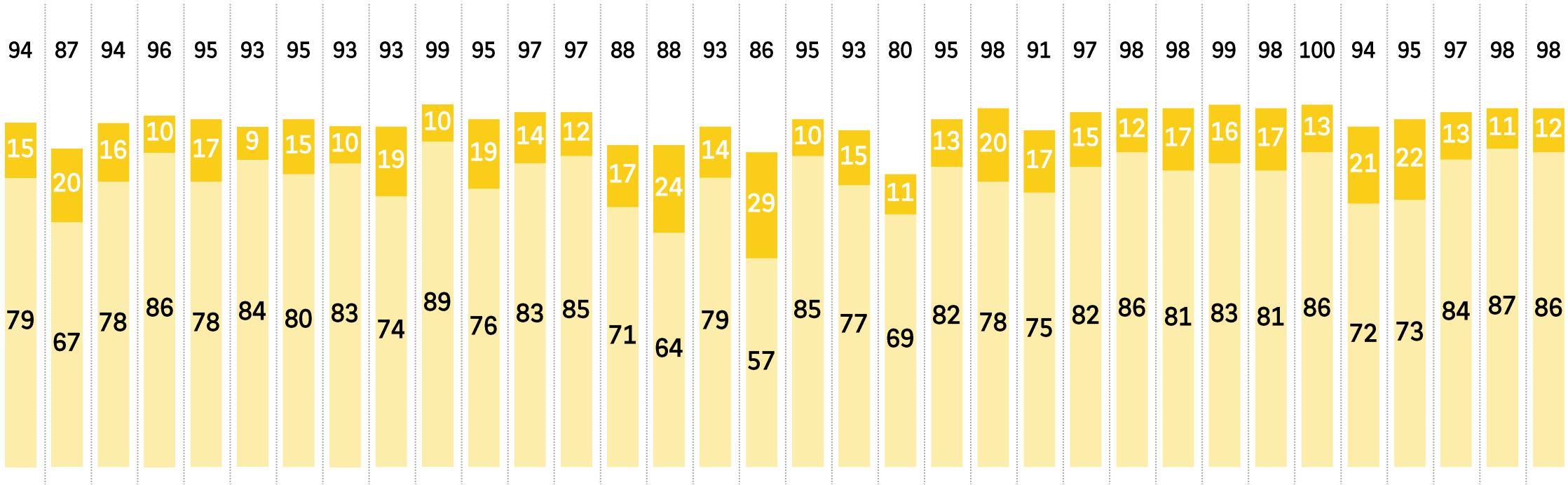
In Switzerland in 2026, 94% of the companies are already using at least one mobility policy or solution or are considering doing so in the next 3 years.

IN %



Already using or consider using in the next 3 years

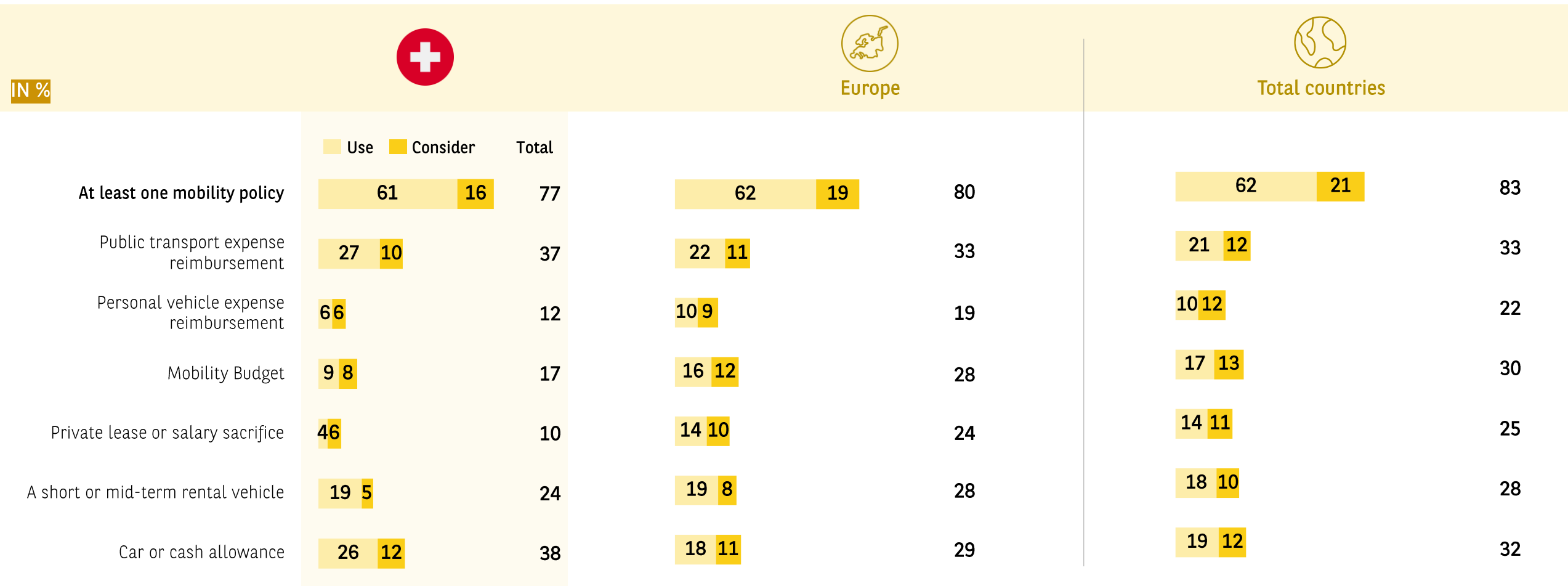
Consider using in the next 3 years
Already using



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

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 37% of the companies are already using Public transport expense reimbursement or are considering doing so in the next 3 years.



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

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 37% of the companies are already using Public transport expense reimbursement or are considering doing so in the next 3 years.



Europe



Total countries

	IN %	2024	2025	2026	2024	2025	2026	2024	2025	2026
Public transport expense reimbursement	Use	23	20	27	23	21	22	21	19	21
	Total (use + consider)	32	33	37	32	33	33	31	32	33
Personal vehicle expense reimbursement	Use		4	6		8	10		8	10
	Total (use + consider)		7	12		16	19		19	22
Mobility Budget	Use	11	12	9	15	16	16	15	15	17
	Total (use + consider)	18	18	17	26	28	28	28	29	30
Private lease or salary sacrifice	Use	8	3	4	15	6	14	13	6	14
	Total (use + consider)	14	6	10	24	13	24	24	15	25
A short or mid term rental vehicle	Use	17	20	19	19	18	19	17	17	18
	Total (use + consider)	22	25	24	28	28	28	27	29	28
Car or cash allowance	Use	22	25	26	17	18	18	17	17	19
	Total (use + consider)	32	37	38	27	30	29	28	30	32

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

X% Significantly higher / lower vs. previous wave



HOW TO READ THE RESULTS ?

In Switzerland in 2026, 31% of the companies are already using Car sharing 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 solution	43	22	65	44	24	67	46	27	72
Car sharing	16	14	31	14	10	24	14	12	26
Bike Leasing	6	8	14	5	6	11	5	7	12
Bike Sharing	4	8	13	6	8	14	6	9	15
Scooter and moto leasing	6	4	10	5	6	12	5	8	13
An app provided by the company to book multiple mobility solutions	10	9	19	10	10	20	10	13	24
A card provided by the company to pay multiple mobility solution	9	8	17	8	11	18	8	13	21

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

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 31% of the companies are already using Car sharing or are considering doing so in the next 3 years.

					 Europe			 Total countries		
	IN %	2024	2025	2026	2024	2025	2026	2024	2025	2026
Car sharing	Use	21	20	16	12	13	14	12	12	14
	Total (use + consider)	32	28	31	21	23	24	23	23	26
Bike Leasing	Use		8	6		4	5		4	5
	Total (use + consider)		13	14		11	11		12	12
Bike Sharing	Use		6	4		5	6		5	6
	Total (use + consider)		12	13		14	14		15	15
Scooter and moto leasing	Use		8	6		4	5		4	5
	Total (use + consider)		11	10		11	12		13	13
An app provided by the company to book multiple mobility solutions	Use	11	9	10	10	11	10	10	11	10
	Total (use + consider)	15	18	19	20	21	20	21	23	24
A card provided by the company to pay multiple mobility solution	Use		11	9		8	8		8	8
	Total (use + consider)		16	17		20	18		22	21

Change of definition

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

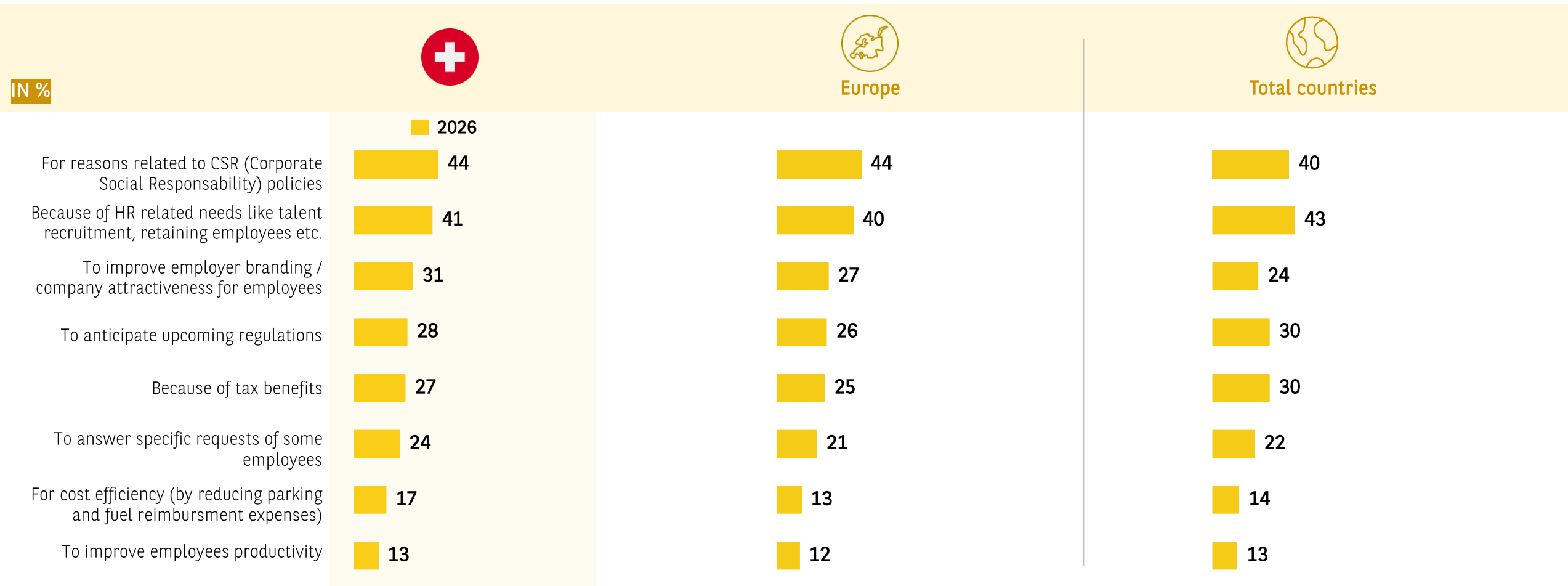
X% Significantly higher / lower vs. previous wave



REASONS FOR IMPLEMENTING MOBILITY SOLUTIONS & POLICIES

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 44% of the companies declare that the main reason for introducing mobility solutions & policies is: For reasons related to CSR (Corporate Social Responsibility) policies.

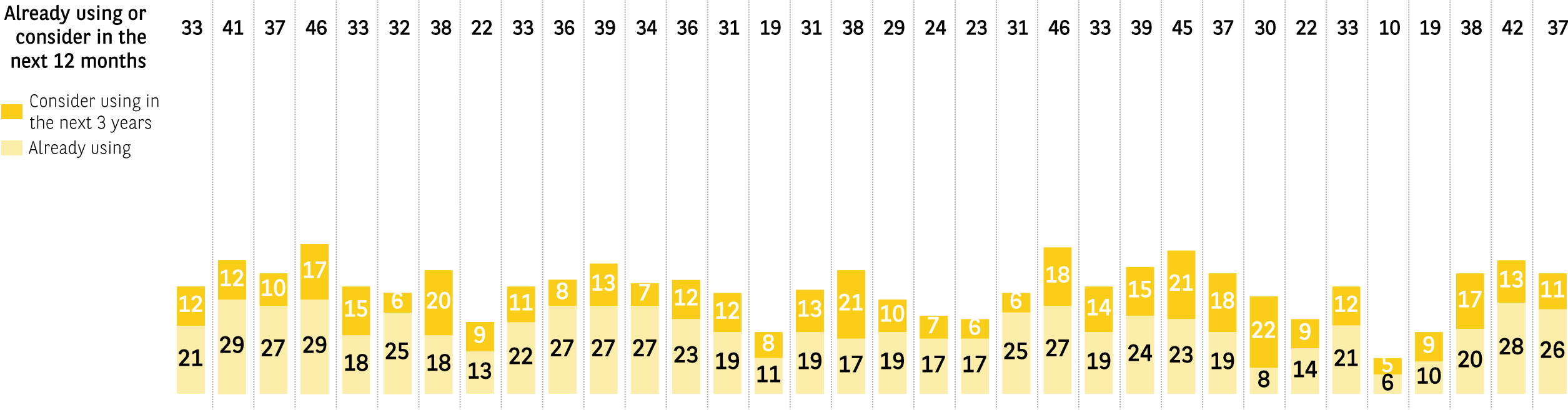


MM16. For what reasons has your company introduced, or does your company intend to introduce, these mobility solutions and policies?
Basis: companies using or considering at least one mobility solution or policy

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 37% of the companies are already using Public transport expense reimbursement or are considering doing so in the next 3 years.

IN %



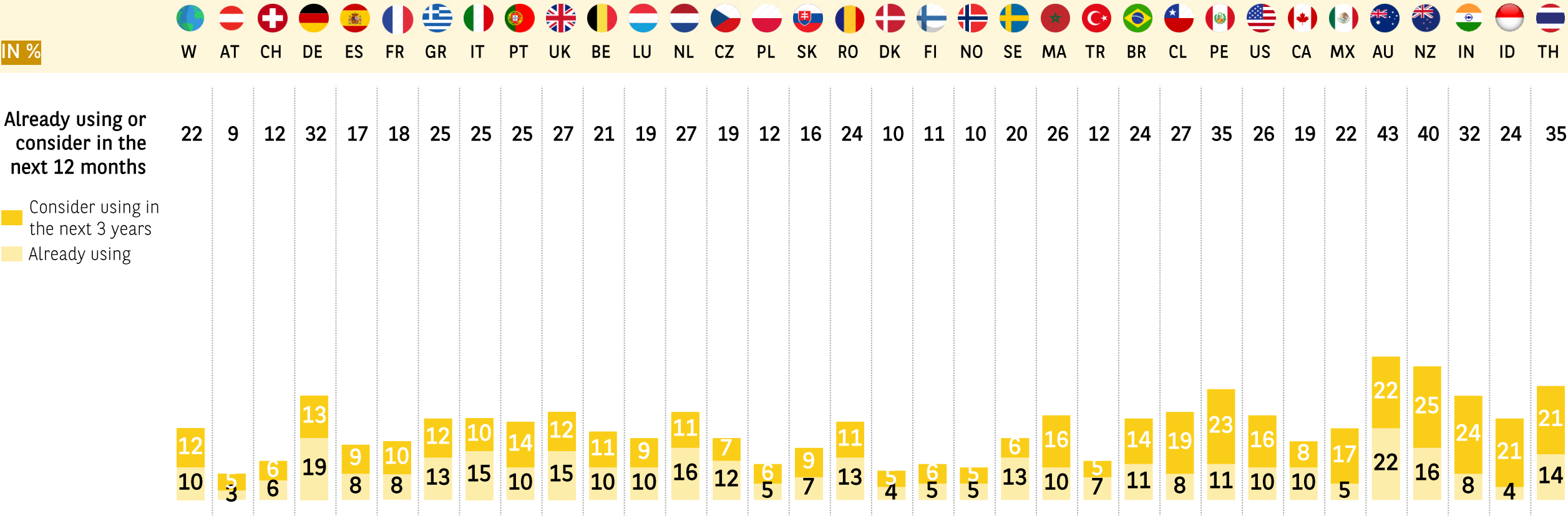
MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

PERSONAL VEHICLE EXPENSE REIMBURSEMENT

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 12% of the companies are already using Personal vehicle expense reimbursement or are considering doing so in the next 3 years.

IN %

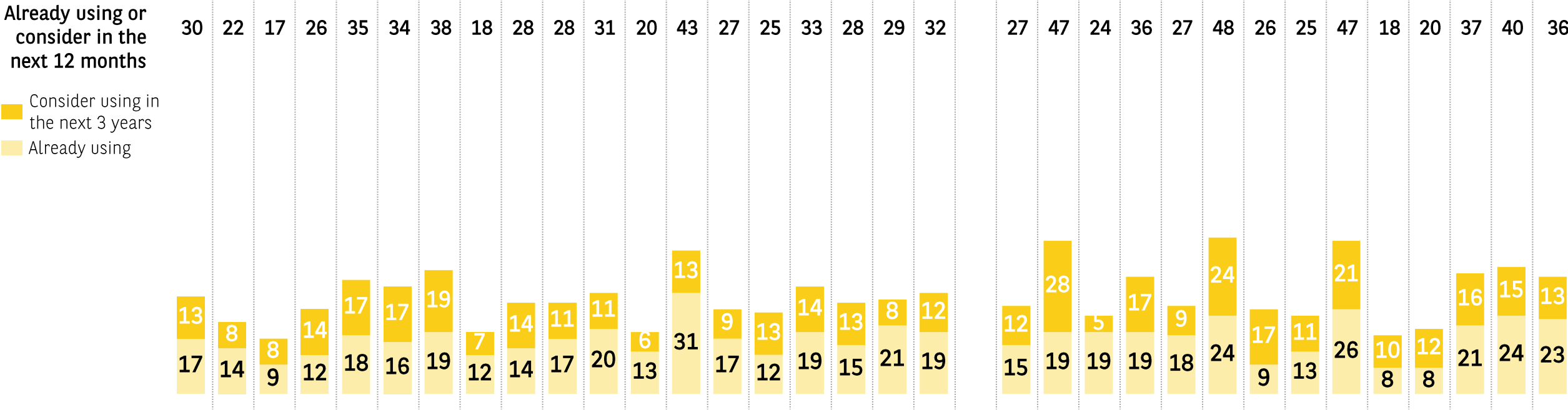


MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 17% of the companies are already using Mobility Budget or are considering doing so in the next 3 years.

IN %



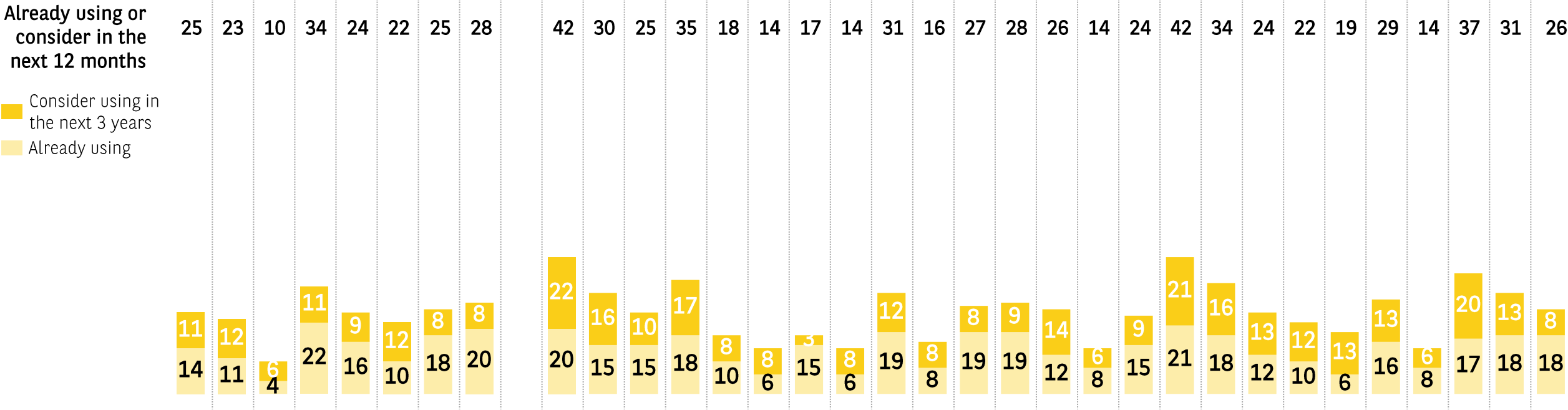
MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

PRIVATE LEASE OR SALARY SACRIFICE

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 10% of the companies are already using Private lease or salary sacrifice or are considering doing so in the next 3 years.

IN %

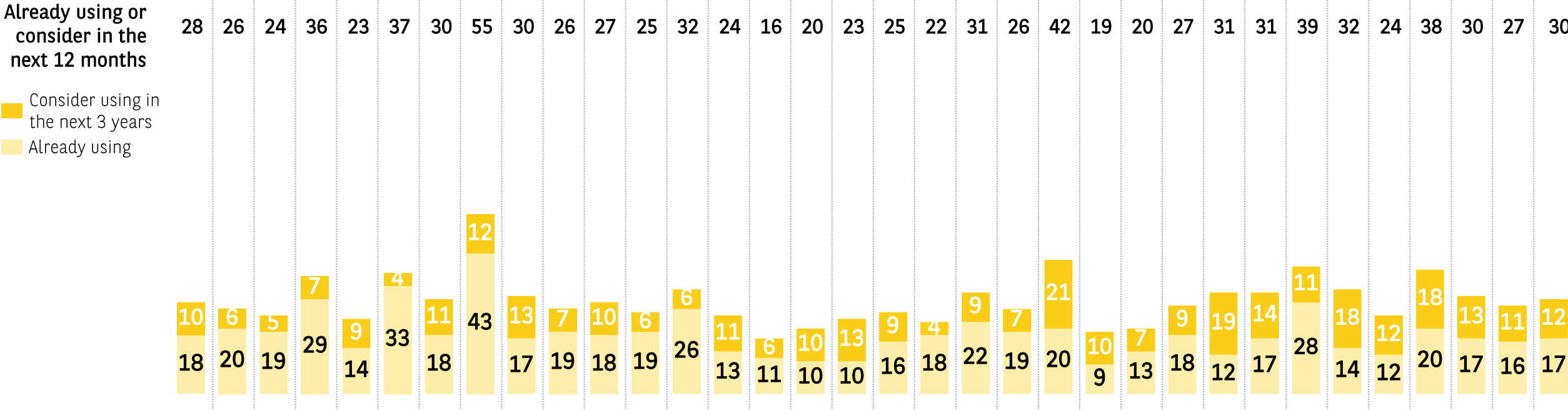


MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

HOW TO READ THE RESULTS ?

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

IN %

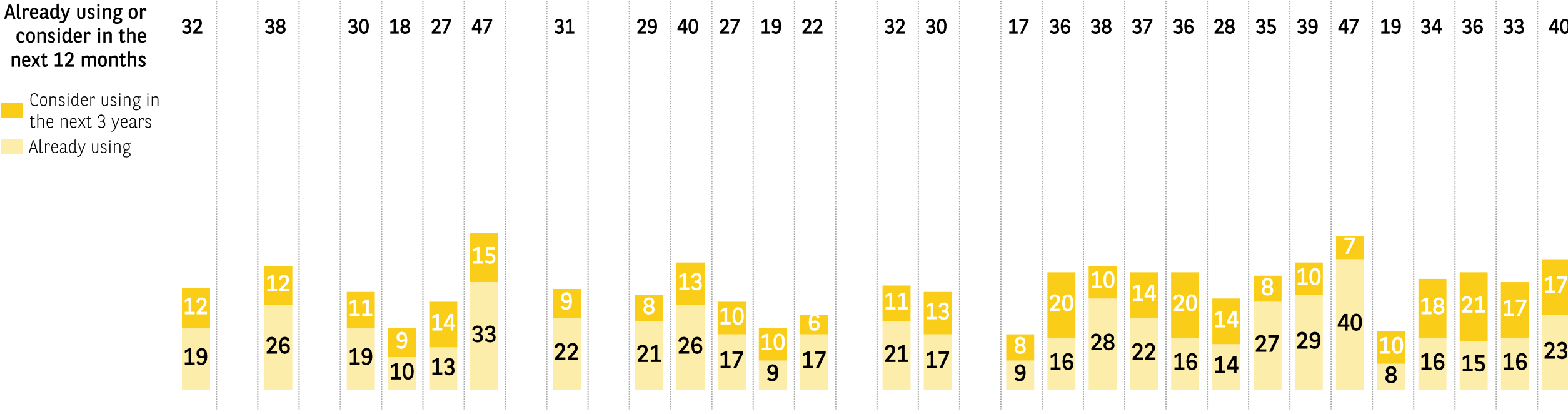


MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 38% of the companies are already using Car or cash allowance or are considering doing so in the next 3 years.

IN %

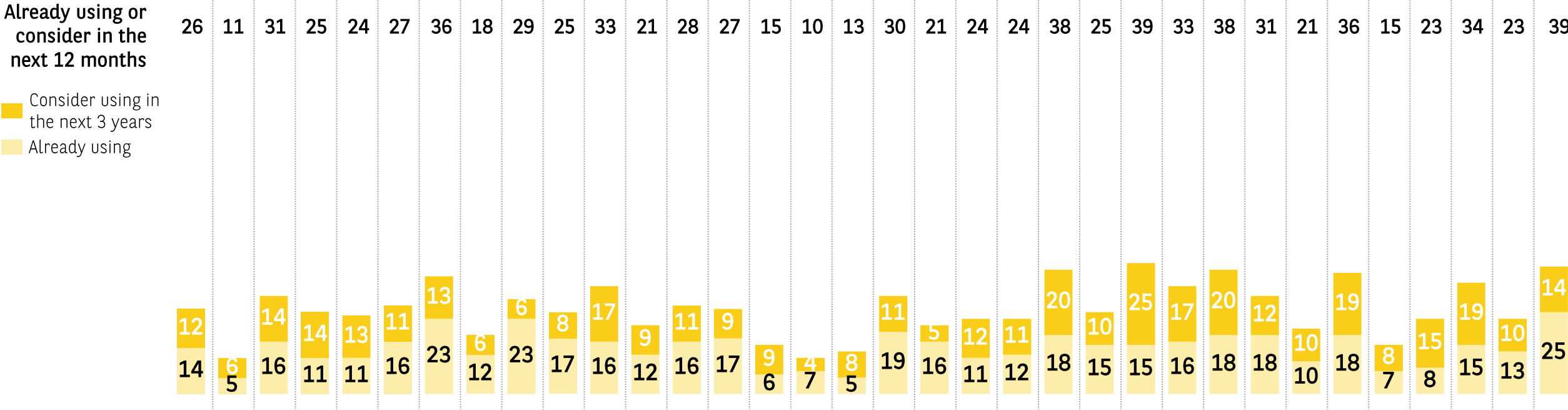


MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 31% of the companies are already using Car sharing / pooled vehicles or are considering doing so in the next 3 years.

IN %



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

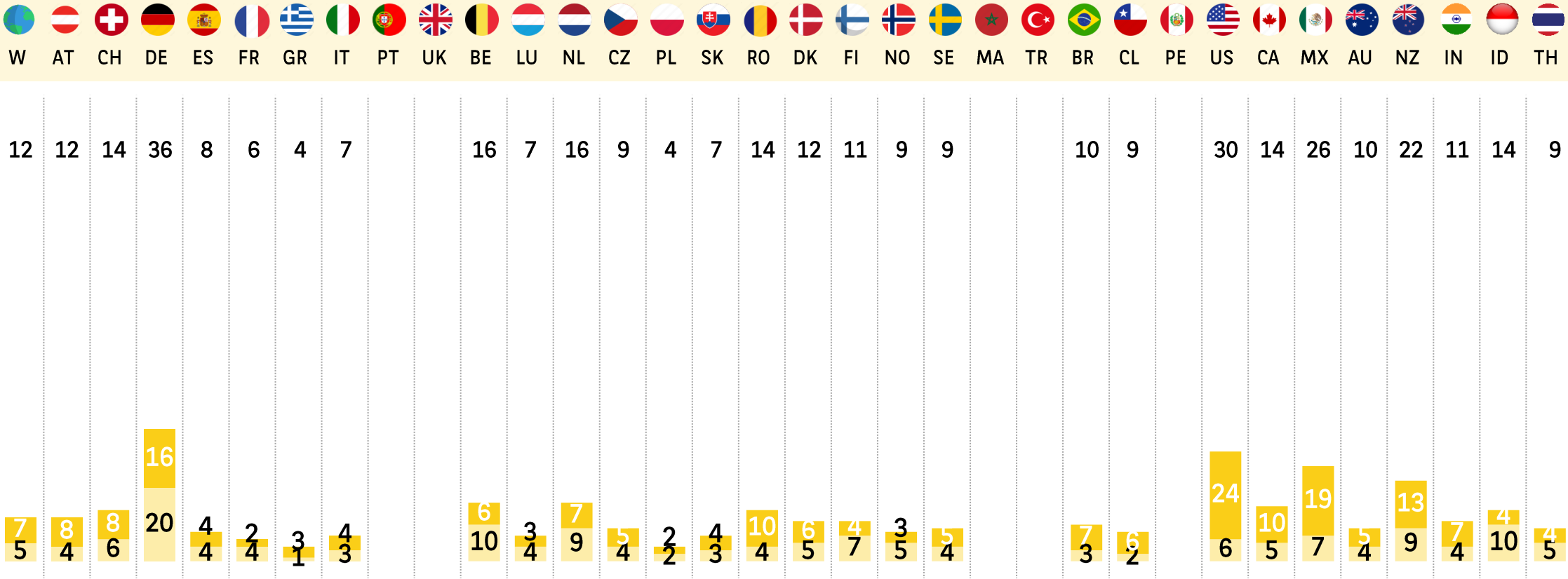
HOW TO READ THE RESULTS ?

In Switzerland in 2026, 14% of the companies are already using Bike leasing or are considering doing so in the next 3 years.

IN %

Already using or consider in the next 12 months

Consider using in the next 3 years
Already using

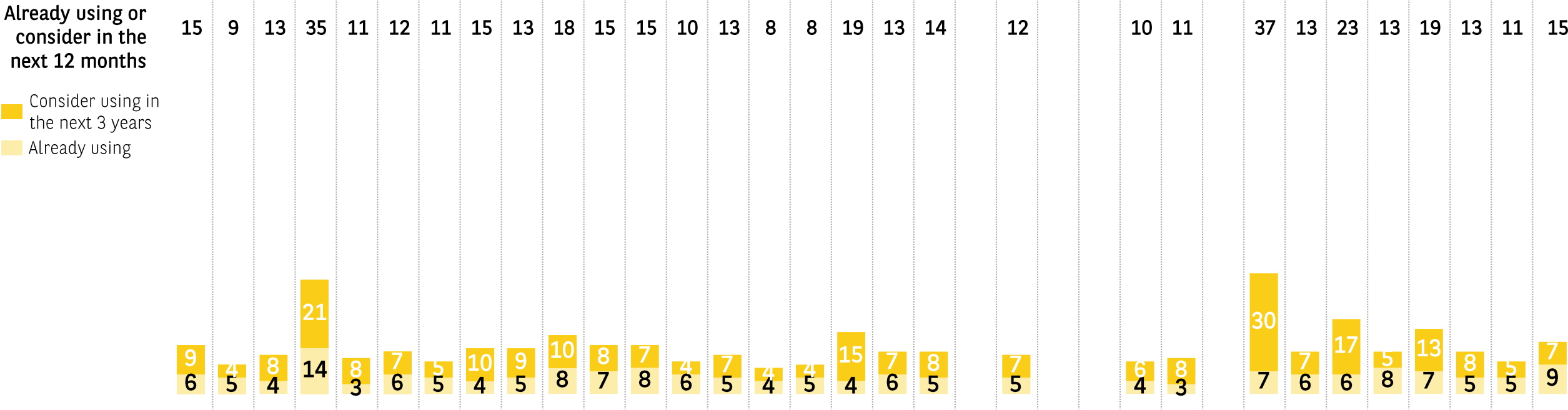


MM15. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 13% 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 policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

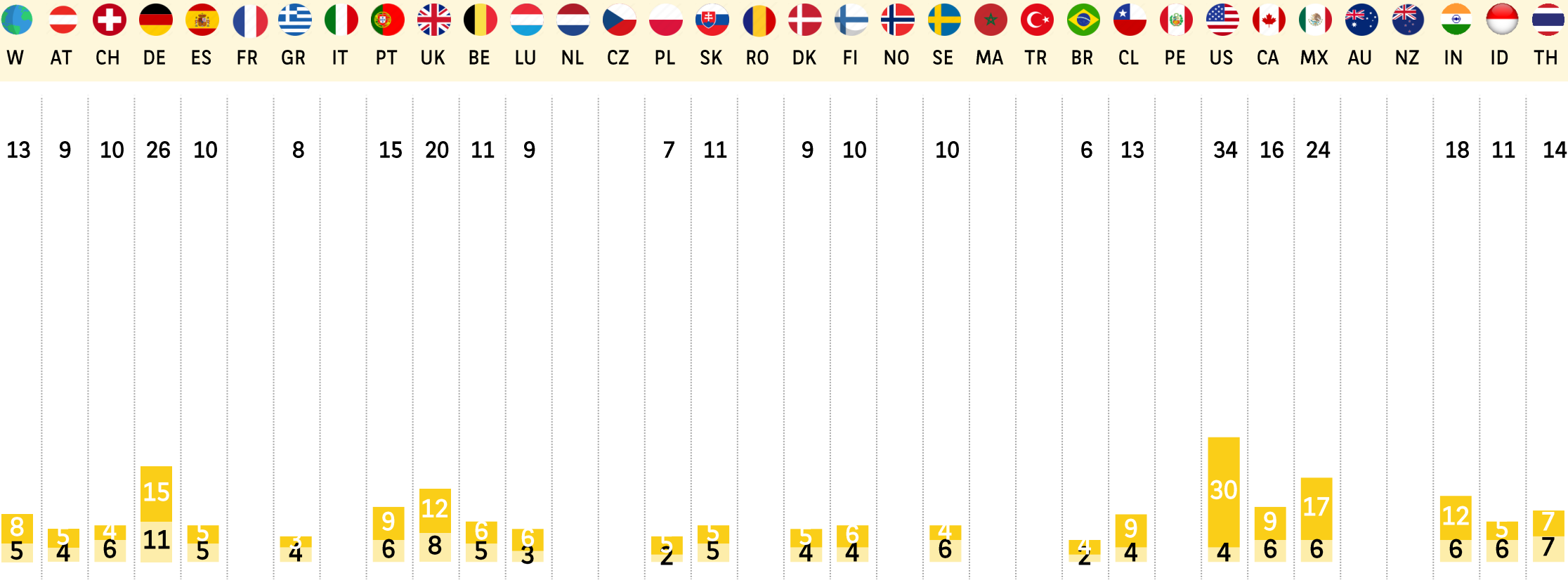
HOW TO READ THE RESULTS ?

In Switzerland in 2026, 10% of the companies are already using Scooter and moto leasing or are considering doing so in the next 3 years.

IN %

Already using or consider in the next 12 months

Consider using in the next 3 years
Already using



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

AN APP PROVIDED BY THE COMPANY TO BOOK MULTIPLE MOBILITY SOLUTIONS

HOW TO READ THE RESULTS ?

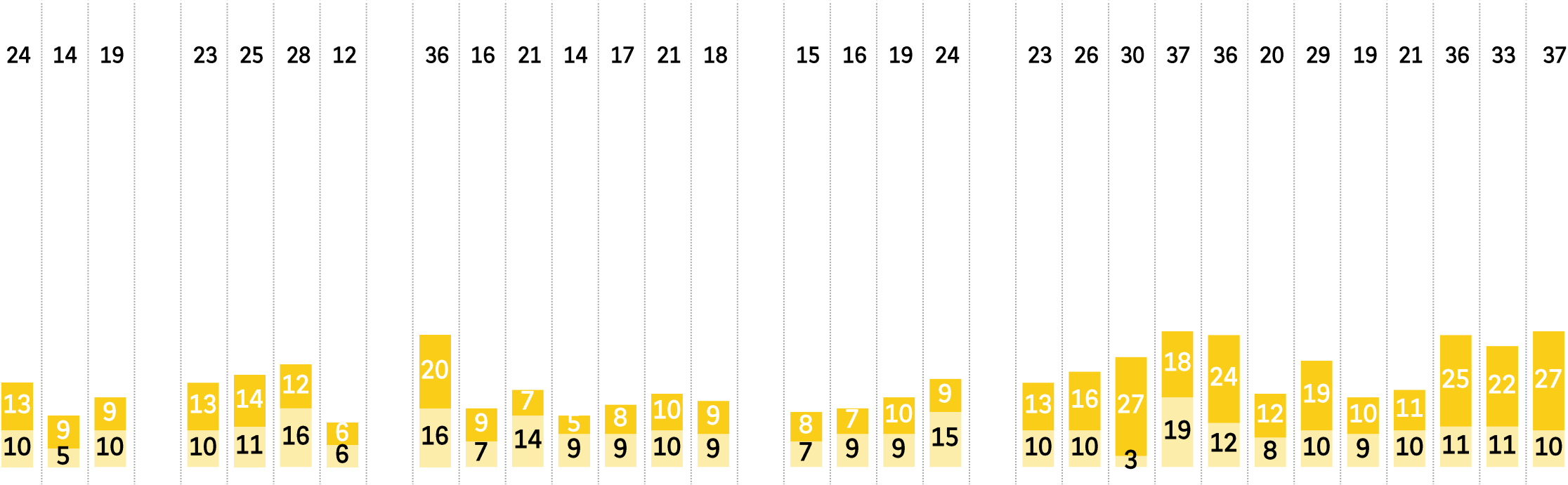
In Switzerland in 2026, 19% of the companies are already using An app provided by the company to book multiple mobility solutions or are considering doing so in the next 3 years.

IN %



Already using or consider in the next 12 months

Consider using in the next 3 years
Already using



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

A CARD PROVIDED BY THE COMPANY TO PAY MULTIPLE MOBILITY SOLUTION

HOW TO READ THE RESULTS ?

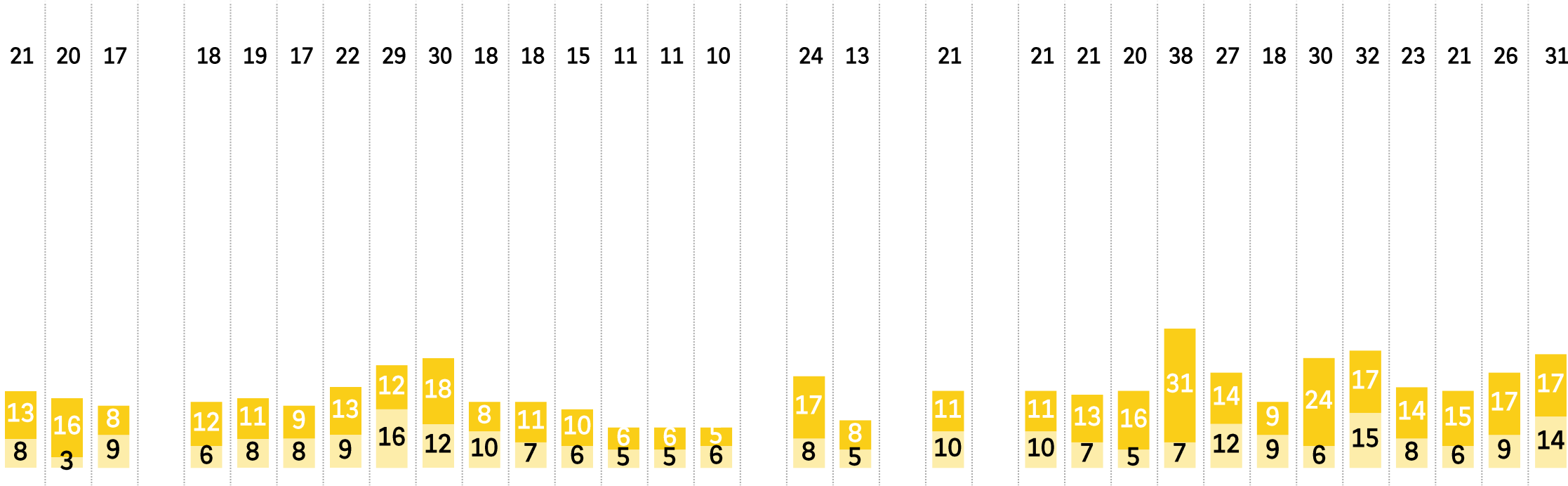
In Switzerland in 2026, 17% of the companies are already using A card provided by the company to pay multiple mobility solution or are considering doing so in the next 3 years.

IN %



Already using or consider in the next 12 months

Consider using in the next 3 years
Already using



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

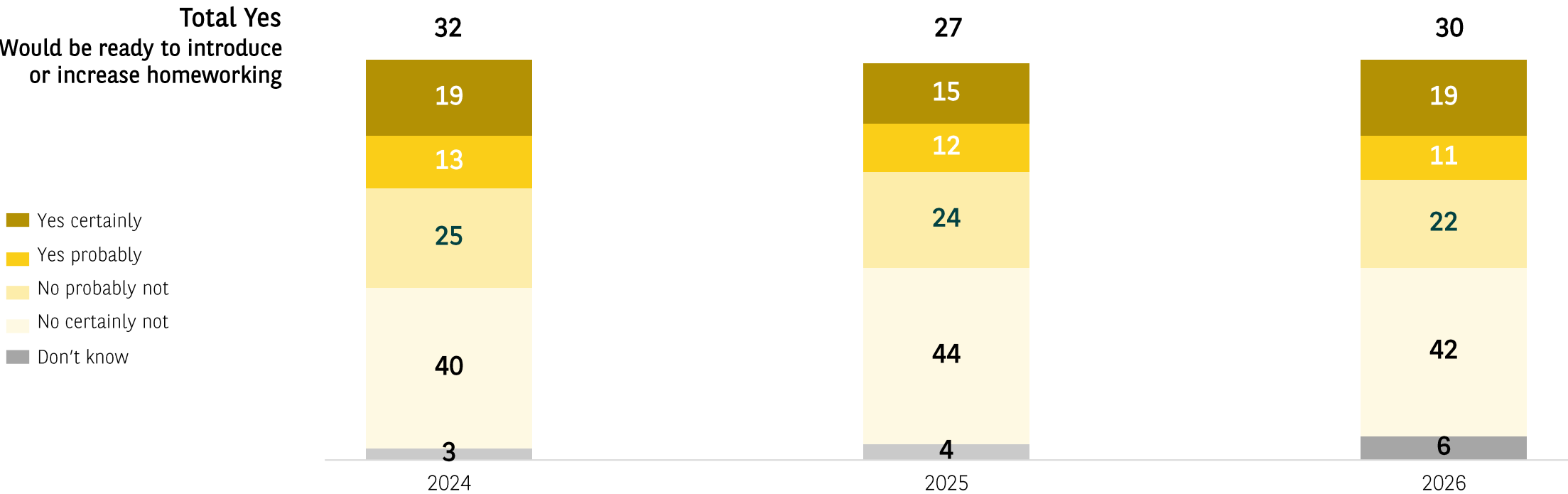
READY TO INTRODUCE OR INCREASE HOMEWORKING

HOW TO READ THE RESULTS ?

In 2026, 30% of the companies would be ready to introduce or increase homeworking for their employees.

Local question

IN %



BE2. Would you be ready to introduce or increase homeworking for your employees ?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave



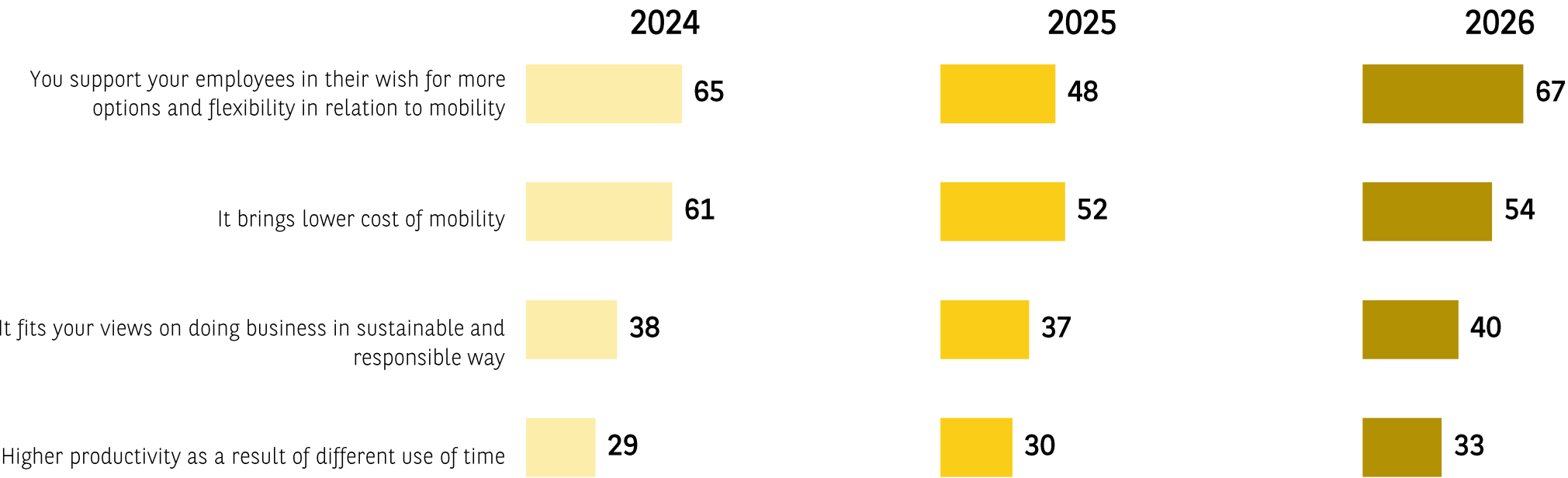
REASONS TO OFFER MOBILITY BUDGET

HOW TO READ THE RESULTS ?

In 2026, 67% of the companies already offer or are considering offering a Mobility Budget to their employees because: You support your employees in their wish for more options and flexibility in relation to mobility.

Local question

IN %



NL30B. Why do you offer or plan to offer a mobility budget?
Basis: companies already offering or considering offering a Mobility Budget

X% Significantly higher / lower vs. previous wave



06

FUTURE CHALLENGES

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



Few Swiss companies have set decarbonization goals

In Switzerland, 16% of companies have set targeted decarbonization goals, while 27% are currently evaluating them, in line with the European average. Large companies show the lowest implementation rate (9%) and the lowest level of consideration (21%).

Additionally, 23% of Swiss companies consider employee mobility's contribution to their decarbonization targets as significant, and 38% view it as a moderate contributor, aligning with the European level.

Swiss fleet managers are facing several challenges

The top challenges include implementing alternative energy technologies (29%), adapting to restrictive ICE policies (25%), mitigating the increase of TCO (25%) and managing longer vehicle delivery times (25%). These figures are stable compared with 2025.

Swiss managers are in demand of innovative solutions for future fleet enhancements

47% of Swiss fleet managers claim they would need help in terms of fleet performance management, and more specifically they would need:

- An all-in-one fleet management software / platform (18%)
- Automated vehicle performance monitoring and predictive maintenance (16%)
- Cost control and financial oversight of fleet operations (12%)
- Fuel consumption monitoring and optimization (12%)

They would also need help in logistics and fleet operations management (23%):

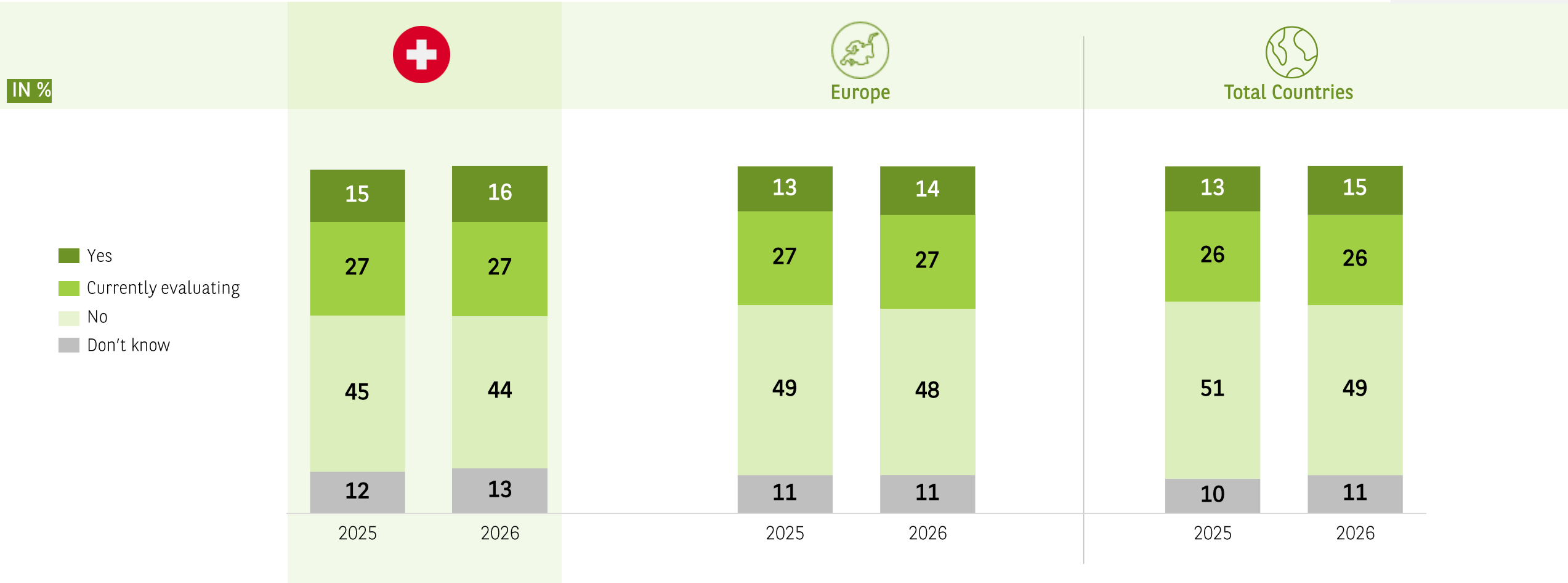
- Fleet allocation, operations coordination and optimization (12%)
- Route and delivery optimization (11%)

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

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 16% of the companies have targeted decarbonization goals.

Change of question



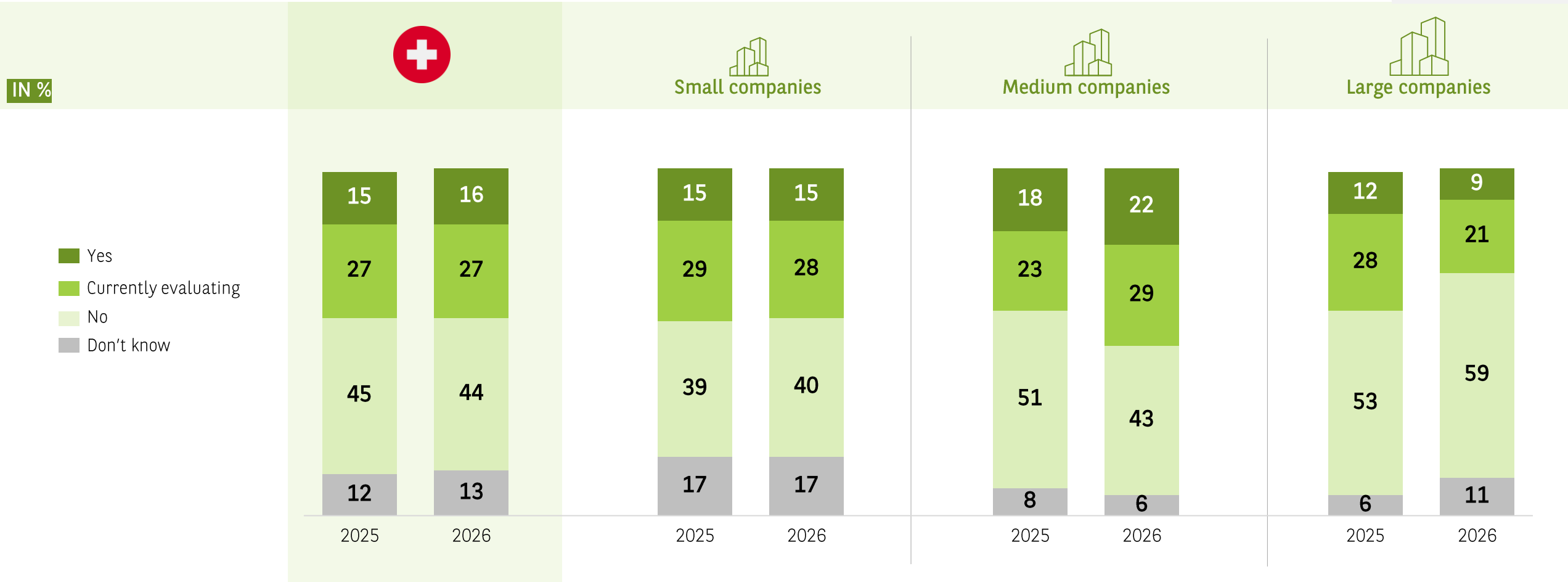
A56. Does your organization have targeted decarbonization goals? It is not limited to fleet, for instance "Net 0"
Basis: companies with corporate vehicles = 100%



HOW TO READ THE RESULTS ?

In Switzerland in 2026, 16% of the companies have targeted decarbonization goals.

Change of question



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

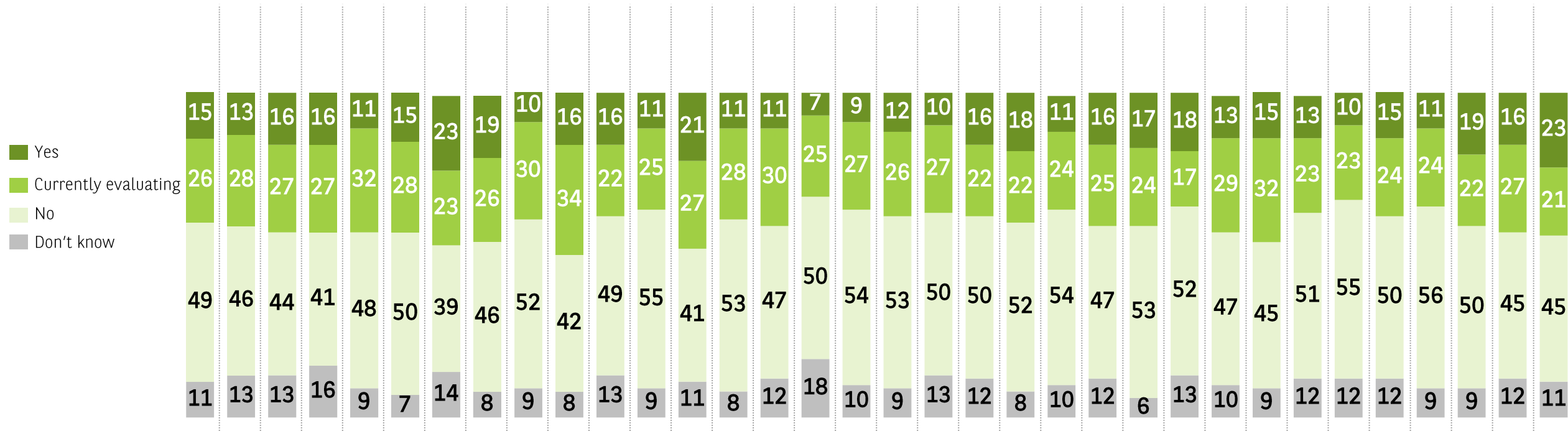
DECARBONIZATION GOALS

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 16% of the companies have targeted decarbonization goals.

Change of question

IN %

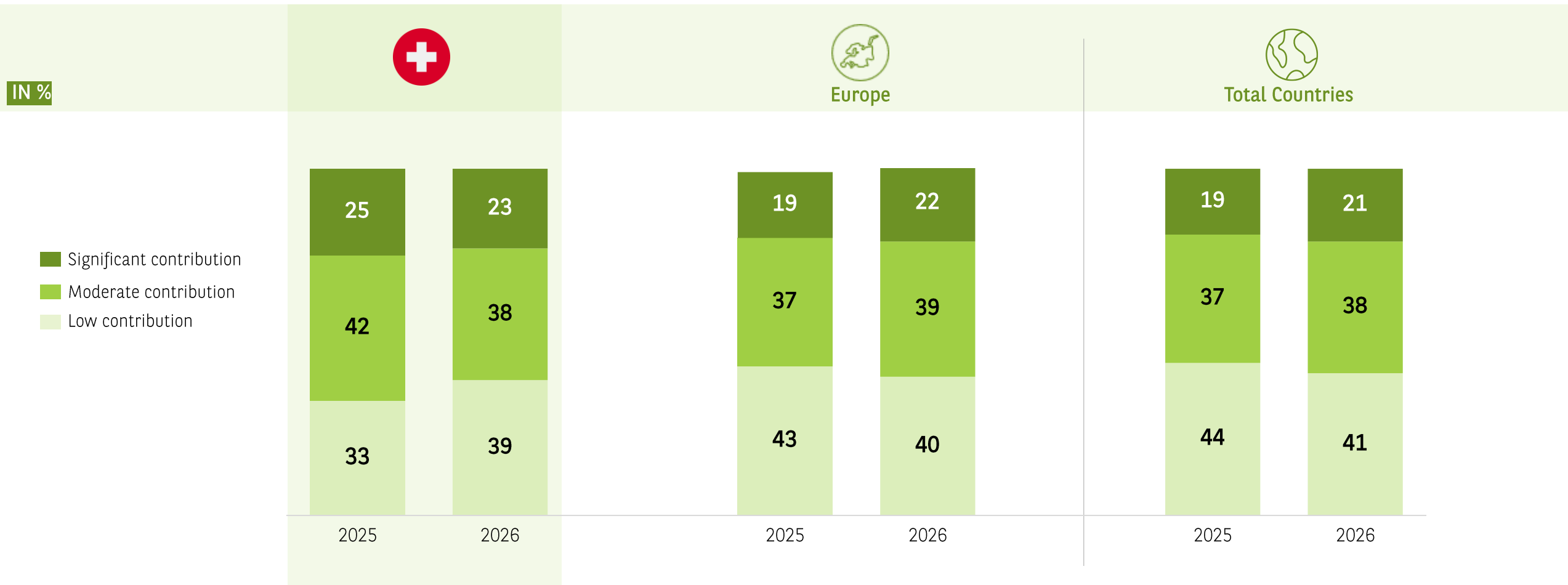


A56. Does your organization have targeted decarbonization goals? It is not limited to fleet, for instance "Net 0"
Basis: companies with corporate vehicles = 100%

IMPORTANCE OF EMPLOYEE'S MOBILITY TO DECARBONIZATION GOALS

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 23% of the companies that have targeted decarbonization goals rate the contribution of employee's mobility in these decarbonization targets as significant contribution.



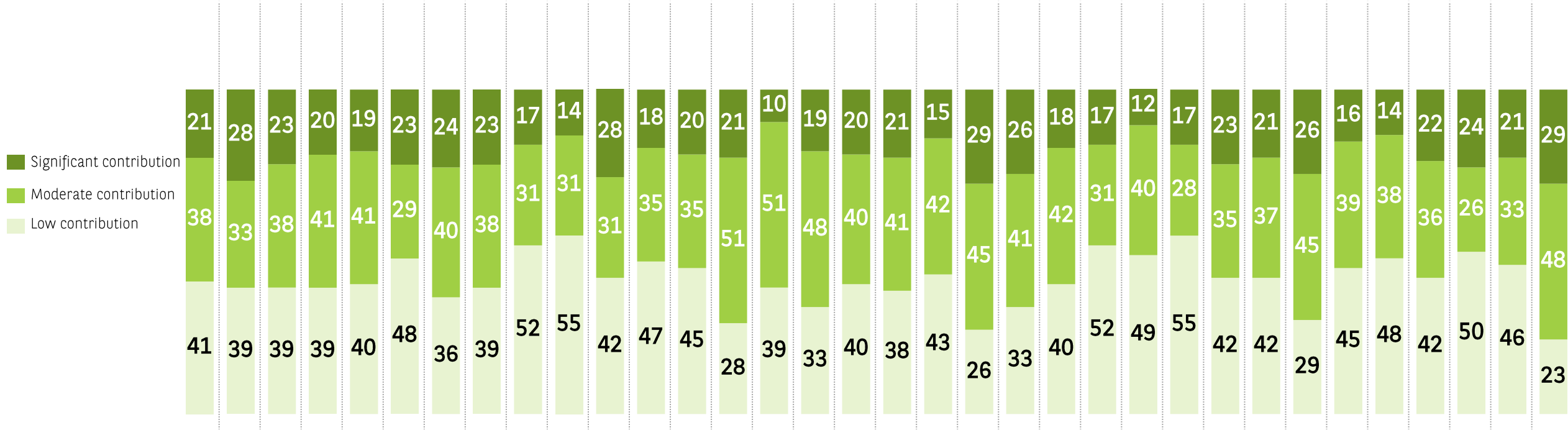
A57. How would you rate the contribution of employees' mobility in these decarbonization targets?
Basis: companies that have targeted decarbonization goals

IMPORTANCE OF EMPLOYEE'S MOBILITY TO DECARBONIZATION GOALS

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 23% of the companies that have targeted decarbonization goals rate the contribution of employee's mobility in these decarbonization targets as significant contribution.

IN %

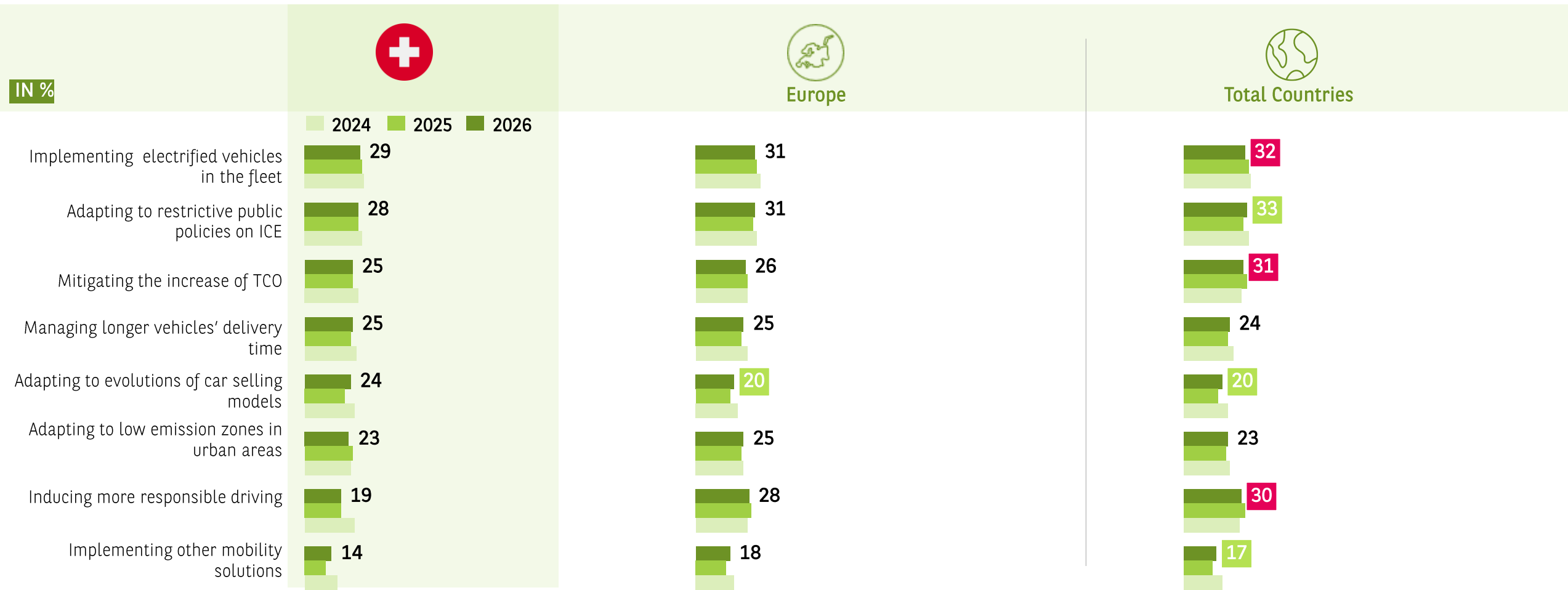


A57. How would you rate the contribution of employees' mobility in these decarbonization targets?
Basis: companies that have targeted decarbonization goals

THREE MAIN CHALLENGES FOR FLEET MANAGEMENT IN THE N3Y

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 29% of the companies declare that Implementing electrified vehicles in the fleet is in the top 3 challenges for fleet management in the next 3 years.



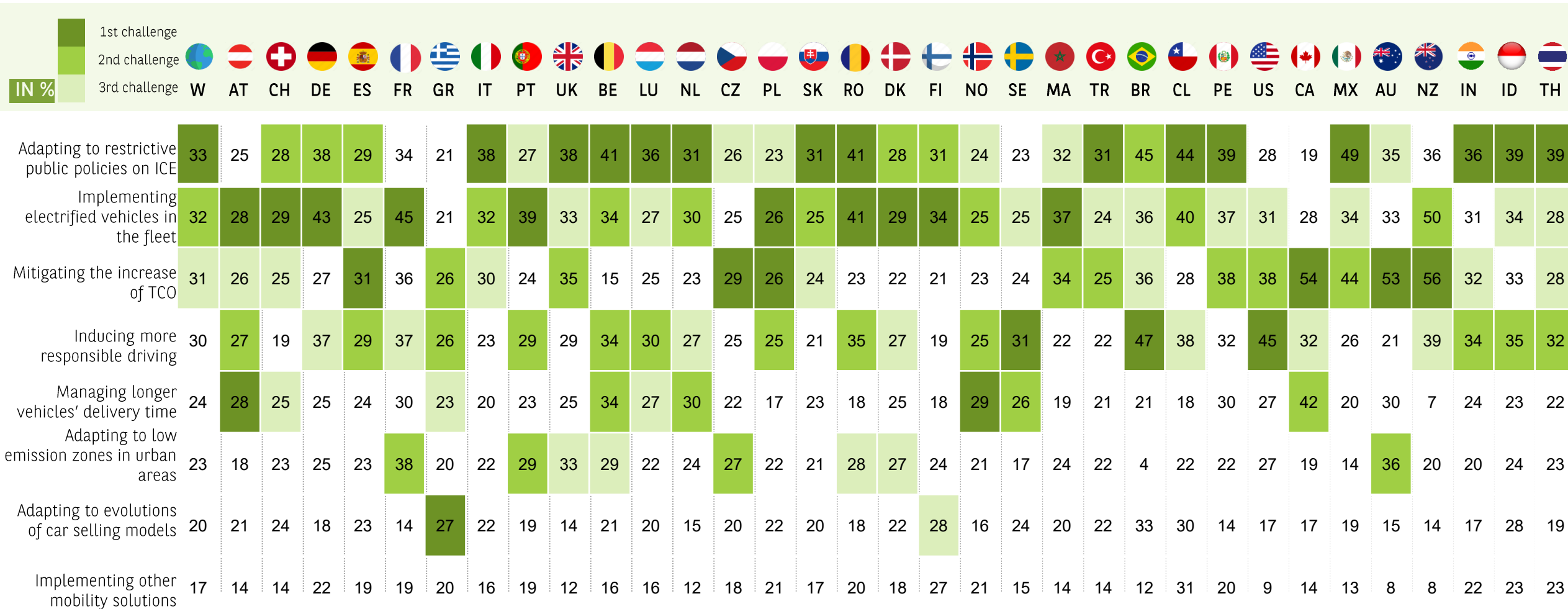
A11. According to you, what will be the three main challenges for fleet management in the next 3 years?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

THREE MAIN CHALLENGES FOR FLEET MANAGEMENT IN THE N3Y

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 29% of the companies declare that Implementing electrified vehicles in the fleet is in the top 3 challenges for fleet management in the next 3 years.



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

OPEN-ENDED QUESTION: WHAT WOULD HELP FLEET MANAGERS?

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 18% of the respondents declare that An all-in-one fleet management software / platform would help them as a fleet manager.

New question

IN %			
		Europe	Total Countries
Fleet performance management	47%	43%	44%
An all-in-one fleet management software / platform	18%	14%	14%
Automated vehicle performance monitoring and predictive maintenance	16%	17%	18%
Cost control and financial oversight of fleet operations	12%	11%	11%
Fuel consumption monitoring and optimization	12%	13%	13%
Logistics and fleet operations management	23%	26%	27%
Fleet allocation, operations coordination and optimization	12%	13%	14%
Route and delivery optimization	11%	14%	15%
Intelligent cargo and load optimization	2%	2%	2%
Driver and safety	21%	21%	21%
Vehicles real-time tracking and monitoring	17%	17%	17%
Driver management and safety standards implementation	3%	3%	3%
Fleet security and protection systems	3%	2%	2%
Administrative & Compliance	10%	9%	9%
Centralizing and digitizing fleet documentation	7%	7%	7%
Proactive compliance deadline management	2%	2%	2%
Environment & Sustainability	5%	5%	5%
Tools and practices for a sustainable fleet management	3%	2%	2%
Support for the adoption and management of electric vehicles	1%	2%	2%
Vehicle emissions monitoring	1%	2%	2%
Others	20%	23%	22%
Other	20%	21%	20%
Enhanced refrigerated vehicles	0%	2%	2%

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

Basis: companies with corporate vehicles = 100%



OPEN-ENDED QUESTION: WHAT WOULD HELP FLEET MANAGERS?



VERBATIM FOR TOP 3 TOPICS

An all-in-one fleet management
software / platform

18%



Vehicles real-time tracking and
monitoring

17%



Automated vehicle performance
monitoring and predictive
maintenance

16%



*"A single integrated platform for
monitoring the fleet that saves me
from using multiple different
applications"*

*"Accurate real-time tracking of fleet
vehicles would allow us to plan work
shifts more efficiently"*

*"Automatic notifications for
inspections, maintenance and
insurance appointments"*

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



OPEN-ENDED QUESTION: WHAT WOULD HELP FLEET MANAGERS?

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 18% of the respondents declare that An all-in-one fleet management software / platform would help them as a fleet manager.

New question

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

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

OPEN-ENDED QUESTION: WHAT WOULD HELP FLEET MANAGERS?

HOW TO READ THE RESULTS ?

In Switzerland in 2026, 18% of the respondents declare that An all-in-one fleet management software / platform would help them as a fleet manager.

New question

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

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

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

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

APPENDIX



Vehicles in fleets

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

Financing methods

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

Electrified vehicles technologies

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

Telematics

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

Mobility policies

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

Mobility solutions

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

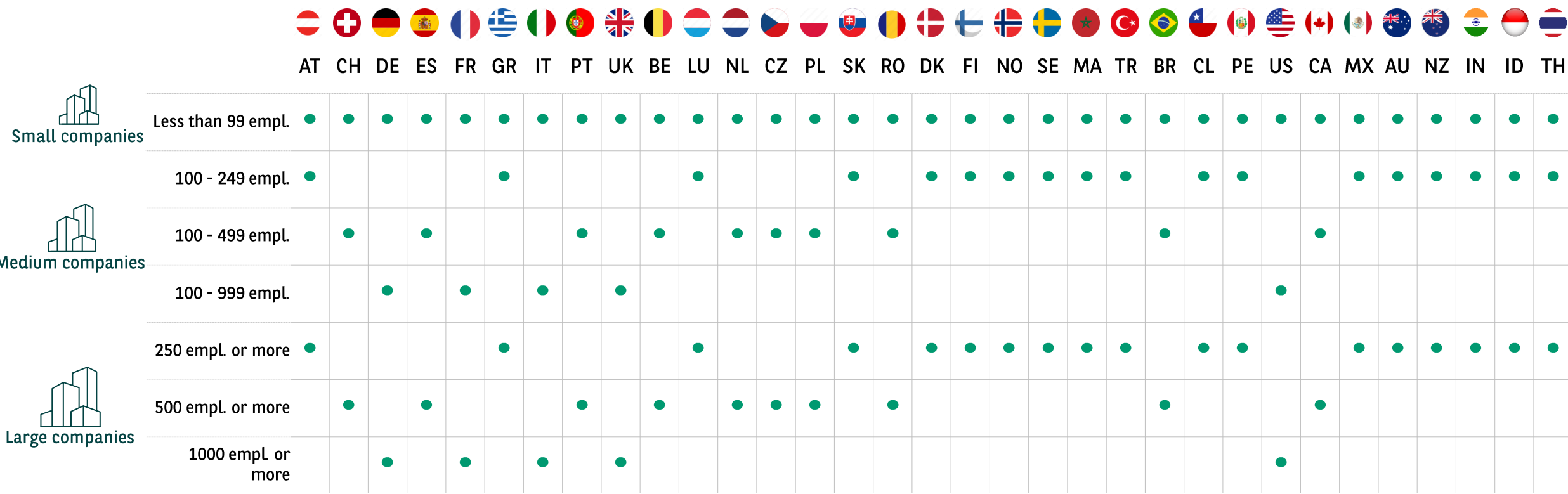
Charging policies

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

Future challenges

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

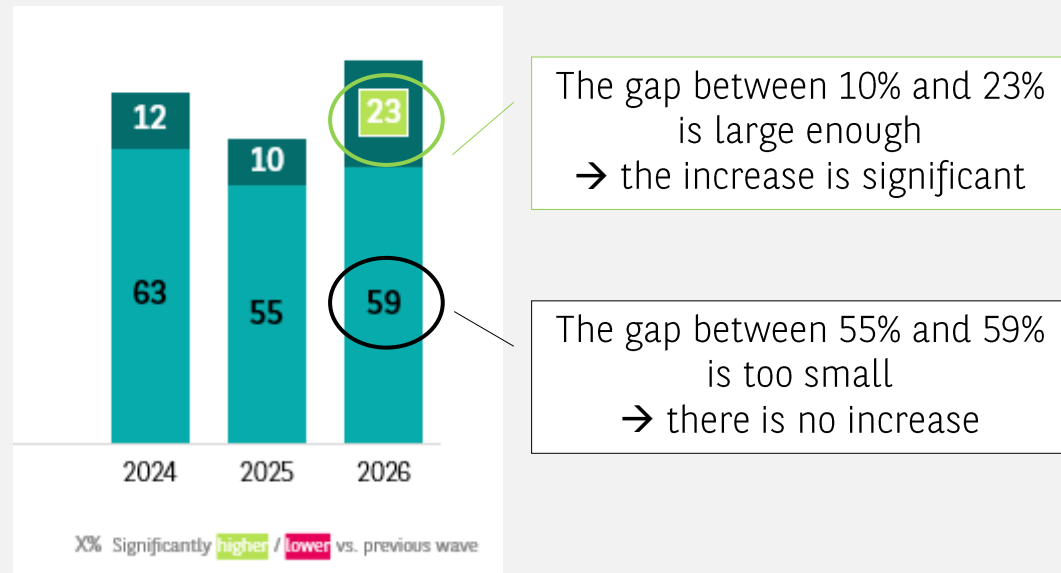
COMPANY SIZE SEGMENT DEFINITION



WHAT IS IT?

This barometer monitors changes between waves.

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



HOW DOES IT WORK?

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

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

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

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

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

THANK YOU