

FLEET AND MOBILITY BAROMETER 2026 VAN FLEET WORLD

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



READING NOTES ABOUT THE REPORT

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

RESEARCH OBJECTIVES

1



What short term shifts
are shaping the market?

2



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

3

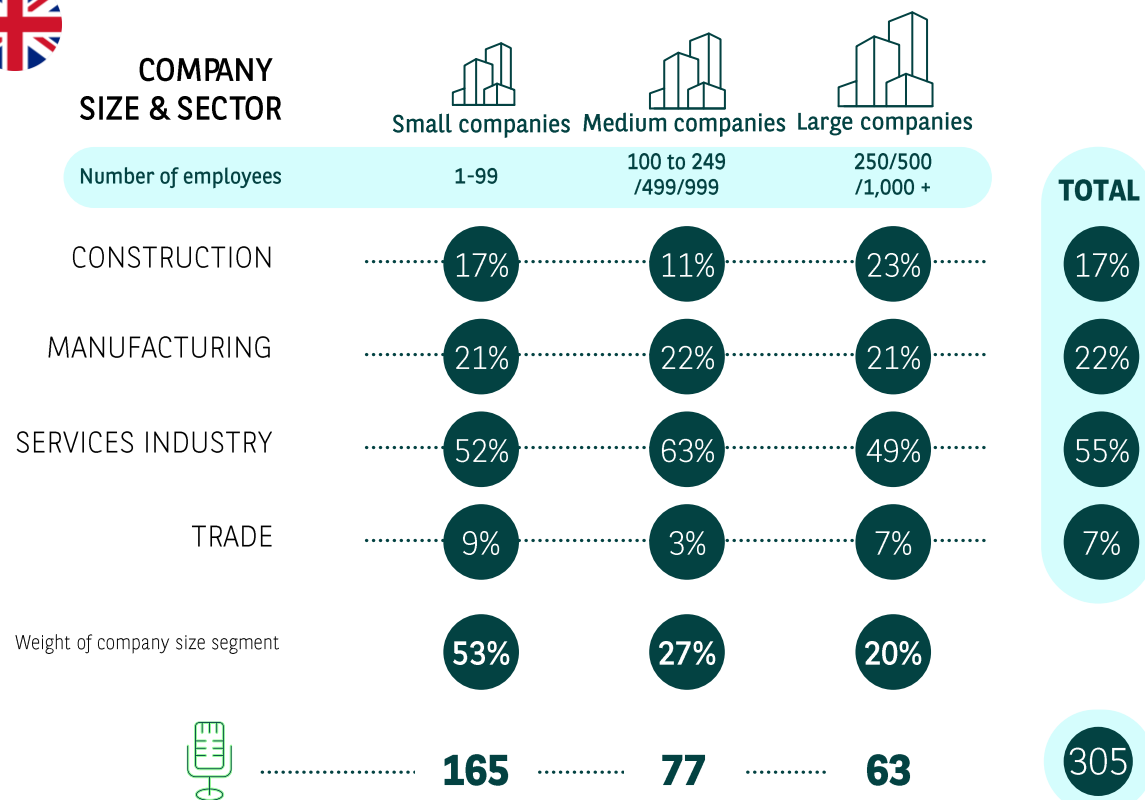


How do mobility solutions
impact corporate mobility?

QUOTAS ON COMPANY SIZE & INDUSTRY



COMPANY SIZE & SECTOR



33 COUNTRIES - 4 REGIONAL BENCHMARKS



Morocco and Turkey: compared with Europe benchmark



MOST COMPANIES IN THE UK REMAIN CONFIDENT ABOUT THEIR FLEETS' FUTURE

88% anticipate their fleet will either remain stable or grow in the next 3 years (with 33% expecting growth – more than in Europe) **58%** include second-hand vehicles in their fleets, more than in Europe



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

34% intend to introduce or increase their use of full-service leasing to finance their fleet, in line with 2025. A consideration more developed among large companies, with 45% planning to adopt this approach **16%** quote full-service leasing as the main financing method for their fleet, with a higher penetration for passenger cars in large companies (26%)



A WIDELY ELECTRIFIED FLEET IN THE UK, DESPITE SKEPTICISM ABOUT THE AMBITIOUS TRAJECTORY OF THE 2030 ICE BAN

94% already use or consider to use electrified passenger cars – ranking amongst the highest in Europe Only **48%** of fleet managers claim they would take all necessary measures to comply if regulations required an exclusive switch of passenger cars to BEVs by 2030



TELEMATICS ADOPTION IS HIGH, BUT DATA USE LAGS DESPITE CLEAR BENEFITS

52% have adopted telematics, the highest adoption rate in Europe. Medium companies are the most equipped (60%), large companies the least (40%) If only **18%** of those equipped utilize telematics data, the consideration remains significant, with 48% of companies still considering leveraging this data



MOBILITY POLICIES AND SOLUTIONS ARE WIDESPREAD, FUELED BY HR NEEDS

40% have implemented ride sharing, 36% are offering an app (30% a card) to book multiple mobility solutions **44%** claim HR needs as one of their main motivations to develop corporate mobility



INTEREST IN DECARBONIZATION AND INNOVATIVE SOLUTIONS FUELS EFFICIENT FLEET MANAGEMENT

16% have set targeted decarbonization goals to date (34% currently evaluating such goals), ICE restrictions, mitigating the increase in TCO and fleet electrification being on top of the agenda **46%** are spontaneously eager for innovative solutions that enhance fleet performance management

01

FLEET CHARACTERISTICS

What are the key characteristics of fleets?



For 2026 most companies in the UK remain confident about their fleet prospects

88% of companies expect their fleet size to remain stable or increase over the next three year, a trend that has been steady for the past two years and aligns with the European average.

Within this group, 33% anticipate growth, which is above the European average. Large companies are more cautious on this increase (27%).

The UK remains above the European average for the use of second-hand vehicles

In 2026, 58% of companies in the UK already include second-hand vehicles in their fleets (more than at European level, 41%), and 31% are considering doing so in the next 3 years.

Second-hand vehicles penetration is higher in large companies (63%) and among Passenger cars (53%) compared to LCVs (15%).

Vehicle downtime management remains a real challenge

21% of companies have experienced an increase in vehicle downtime in the last 12 to 18 months (vs. 24% in 2025 and 18% in 2024). To overcome these difficulties, fleet managers use short or mid-term rental to replace vehicles off the road (52%), introduce manufacturers with better parts supply (40%), and manage the process more closely (34%).

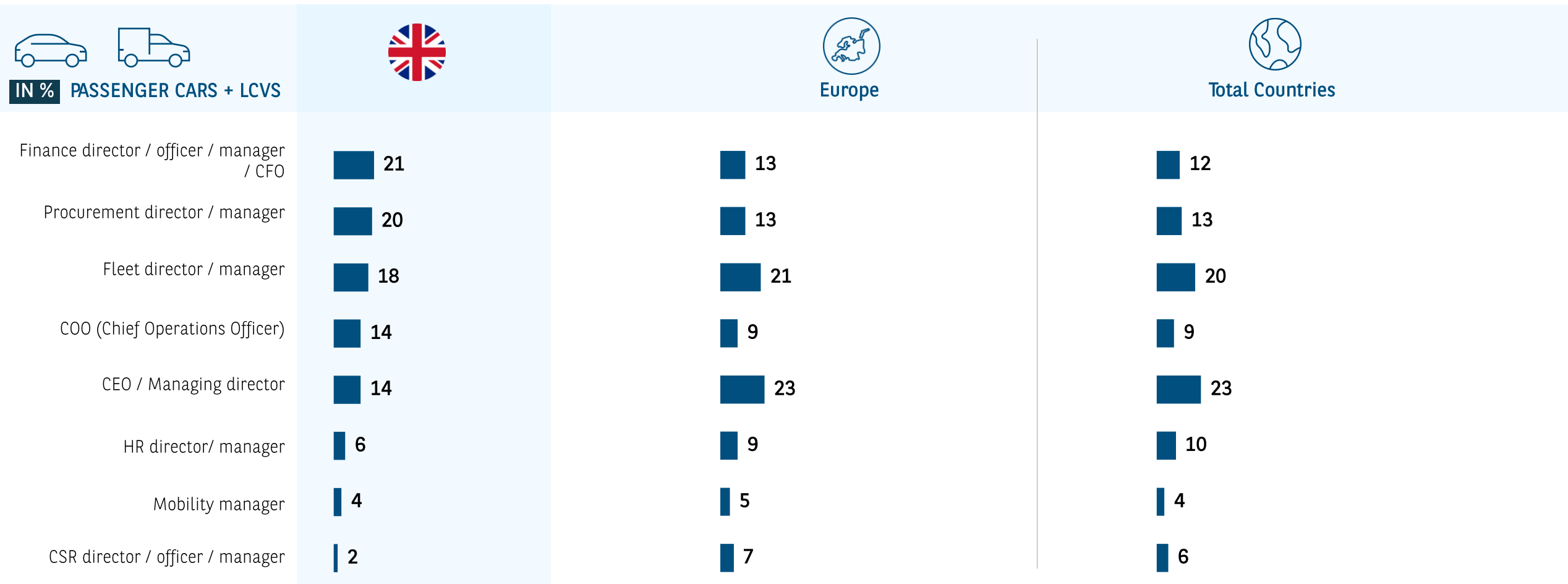
The impact of new OEMs on choice lists remains rather limited

26% of companies already include them in their choice list, and 21% are considering doing so. 23% claim they will wait until these new entrants are more established on the market.

RESPONDENT POSITION

HOW TO READ THE RESULTS ?

In United Kingdom, 21% of the respondents are Finance director / officer / manager / CFO.



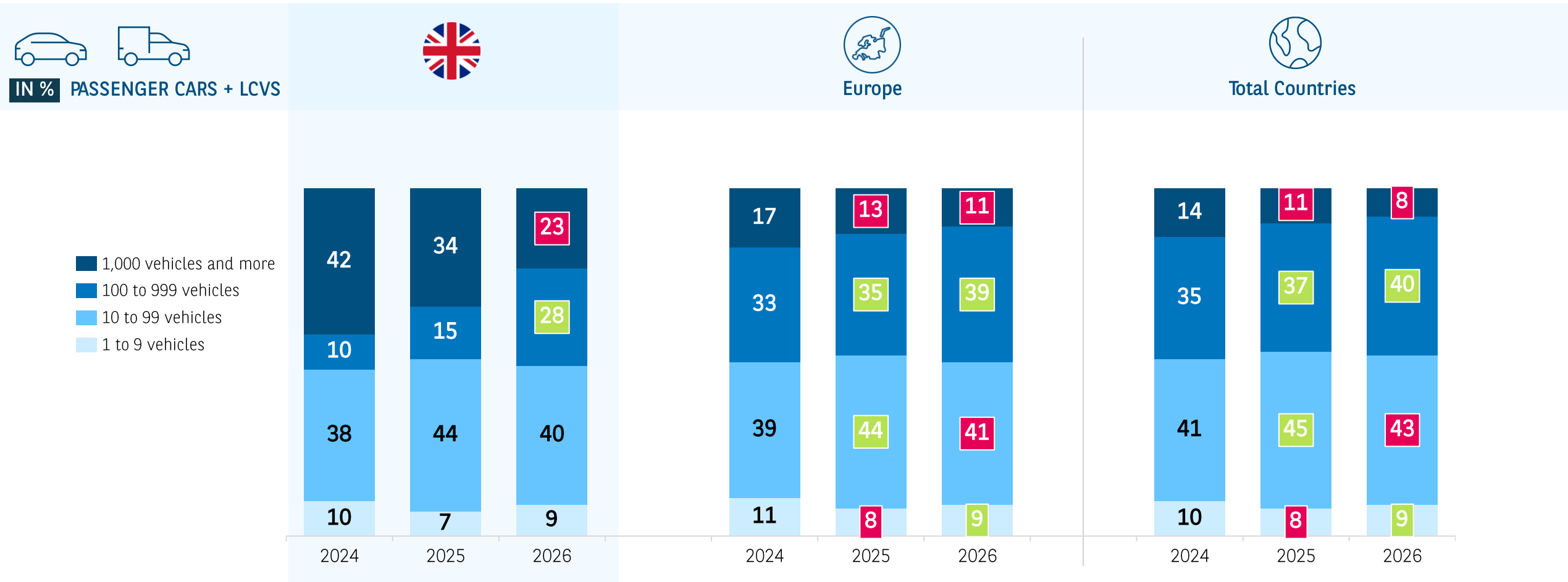
SC5TER. Could you please specify your exact position in the company?

Basis: companies with corporate vehicles = 100%

NUMBER OF VEHICLES IN FLEETS

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, vehicle fleets are composed of: 9% with 1-9 vehicles, 40% with 10-99 vehicles, 28% with 100-999 vehicles and 23% with 1,000 or more.



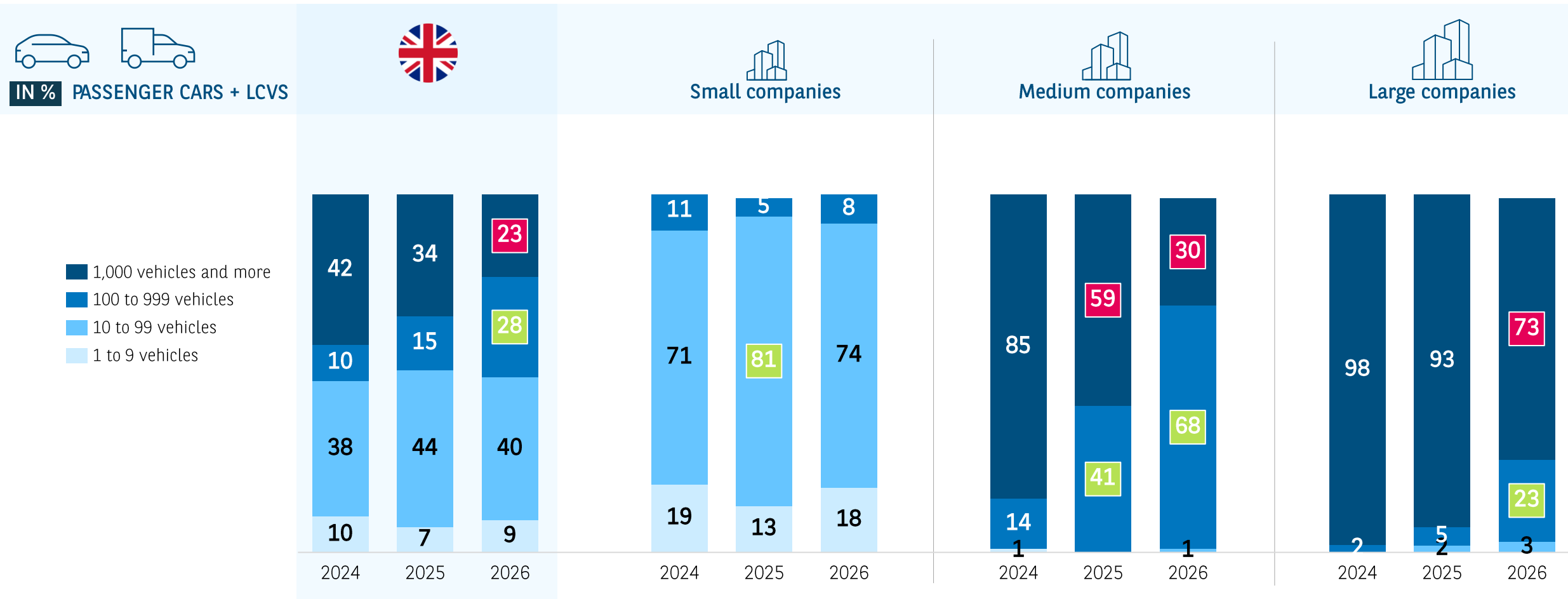
A5/ZDA5. Can you please tell us the total number of vehicles of less than 3.5 tons in your fleet?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

NUMBER OF VEHICLES IN FLEETS

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, vehicle fleets are composed of: 9% with 1-9 vehicles, 40% with 10-99 vehicles, 28% with 100-999 vehicles and 23% with 1,000 or more.



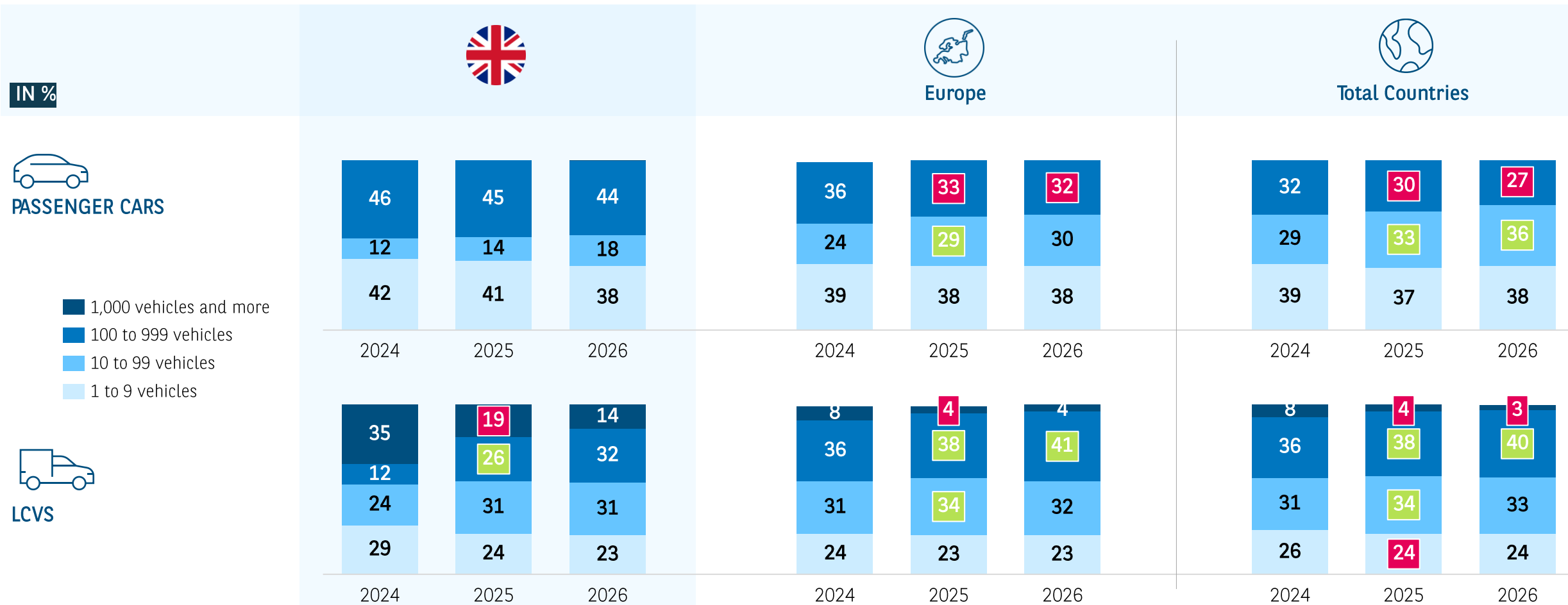
A5/ZDA5. Can you please tell us the total number of vehicles of less than 3.5 tons in your fleet?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

NUMBER OF PASSENGER CARS AND LCVS IN FLEETS

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, passenger car fleets are composed of: 38% with 1-9 vehicles, 18% with 10-99 vehicles, 44% with 100-999 vehicles and 1% with 1000 or more. And LCV fleets are composed of: 23% with 1-9 vehicles, 31% with 10-99 vehicles, 32% with 100-999 vehicles and 14% with 1,000 or more.



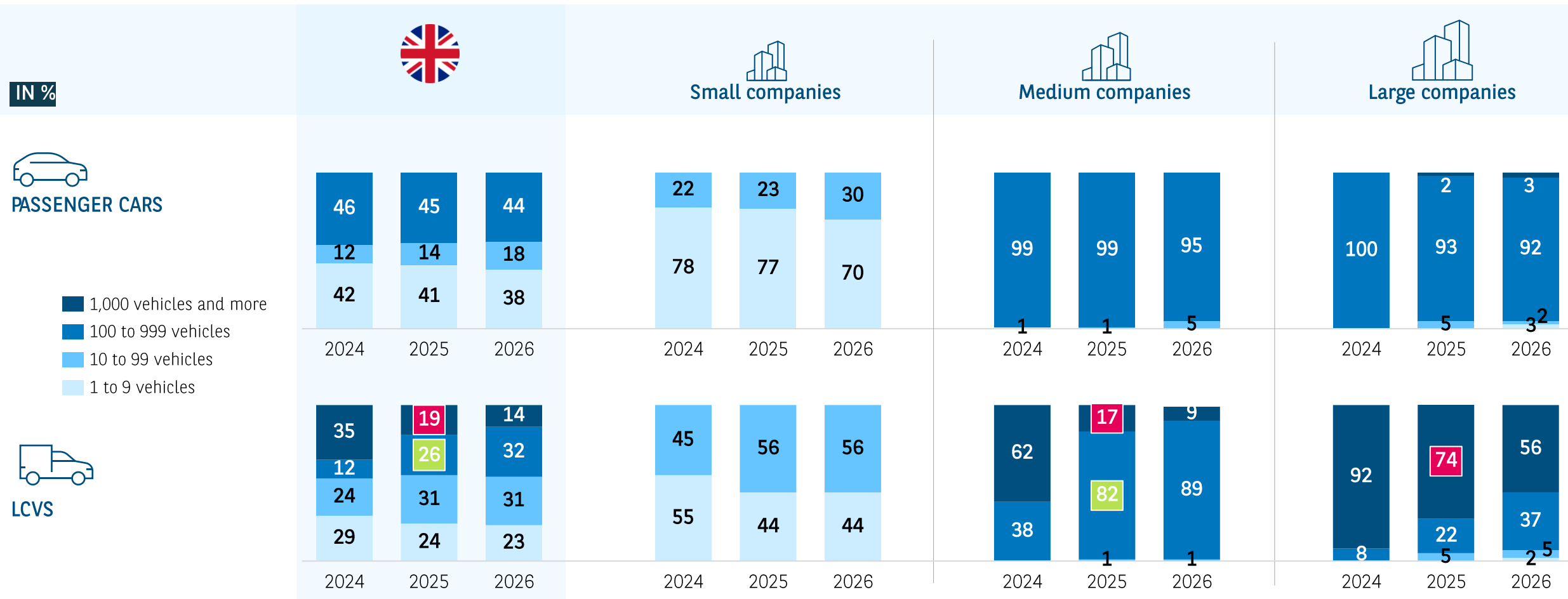
A5F. Can you please tell us the total number of cars and then the number of LCV's or vans in your fleet?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

NUMBER OF PASSENGER CARS AND LCVS IN FLEETS

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, passenger car fleets are composed of: 38% with 1-9 vehicles, 18% with 10-99 vehicles, 44% with 100-999 vehicles and 1% with 1000 or more. And LCV fleets are composed of: 23% with 1-9 vehicles, 31% with 10-99 vehicles, 32% with 100-999 vehicles and 14% with 1,000 or more.



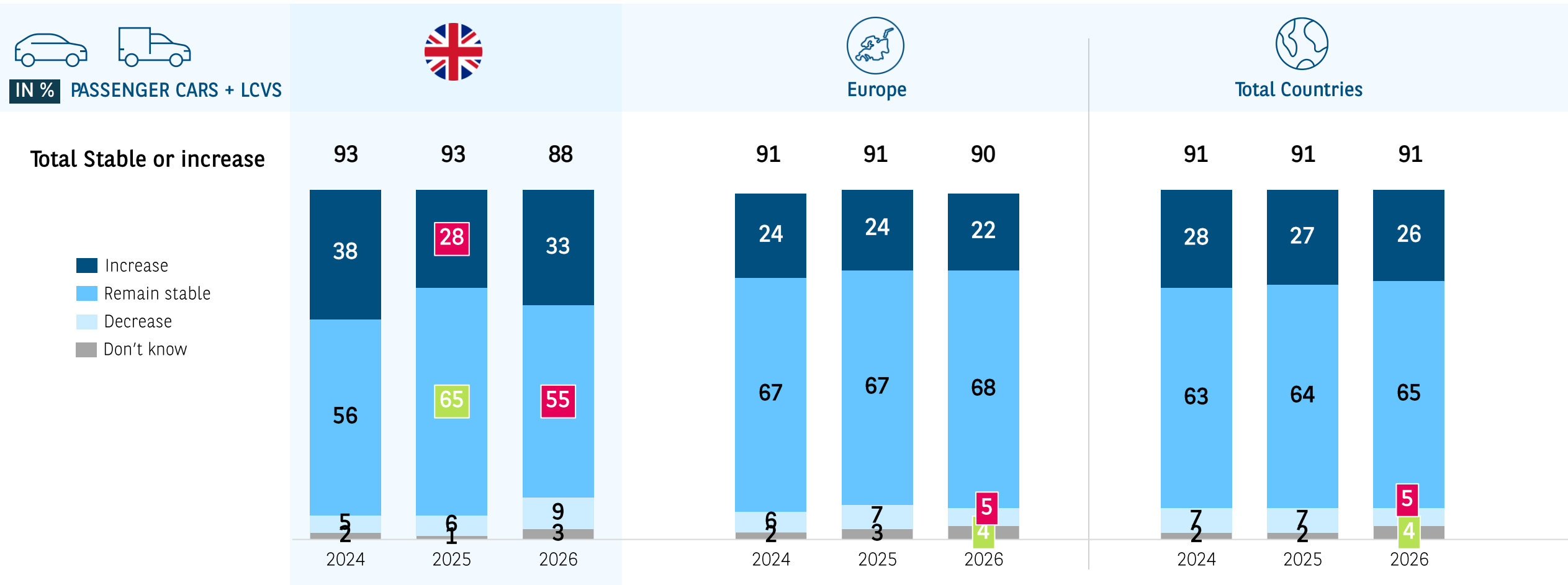
A5F. Can you please tell us the total number of cars and then the number of LCV's or vans in your fleet?
Basis: companies with corporate vehicles = 100%

X% Significantly higher/lower vs. previous wave

FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

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



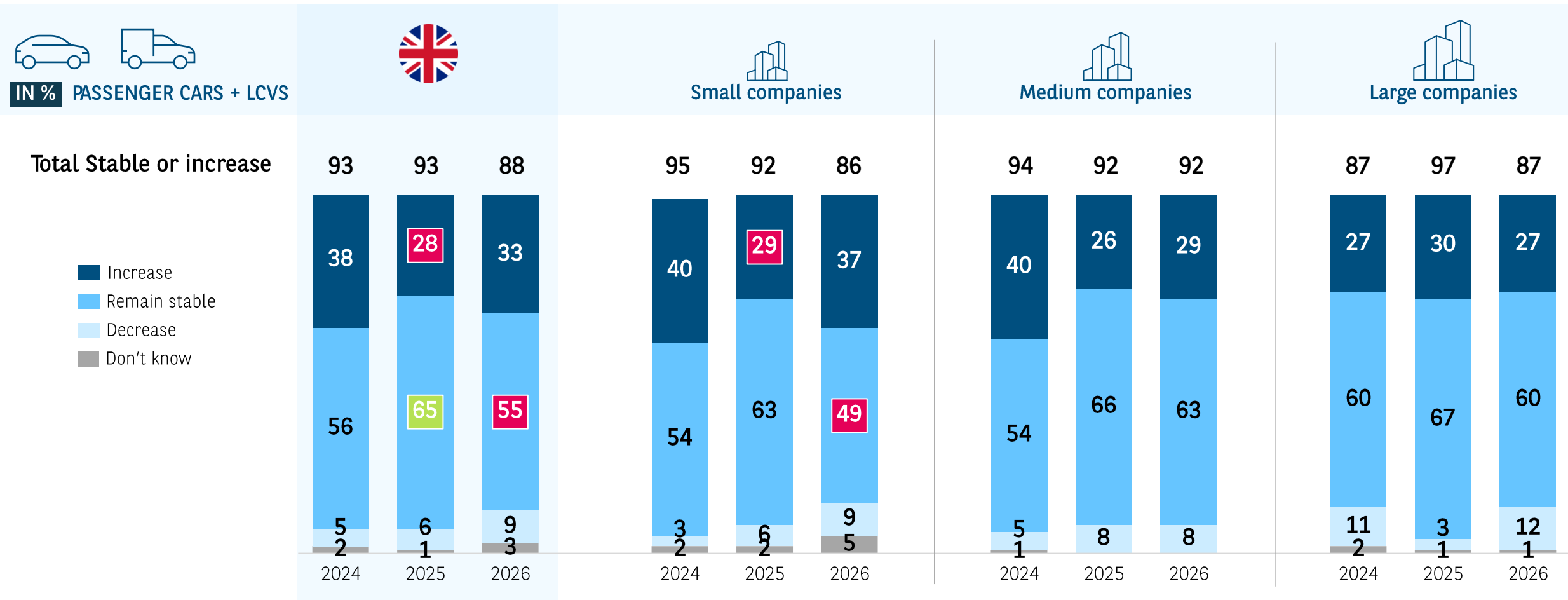
A8. In the next three years, do you think that the total number of vehicles in your company fleet will increase, decrease or remain the same?
 Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

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



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

X% Significantly higher / lower vs. previous wave

FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

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

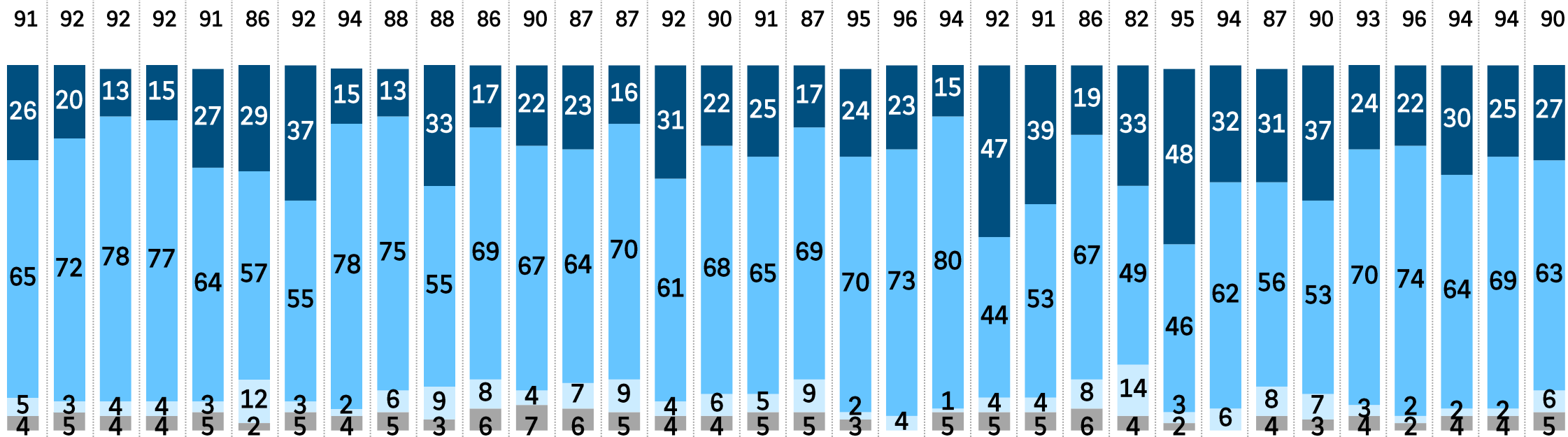


IN % PC + LCVS

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

Total Stable or increase

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



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

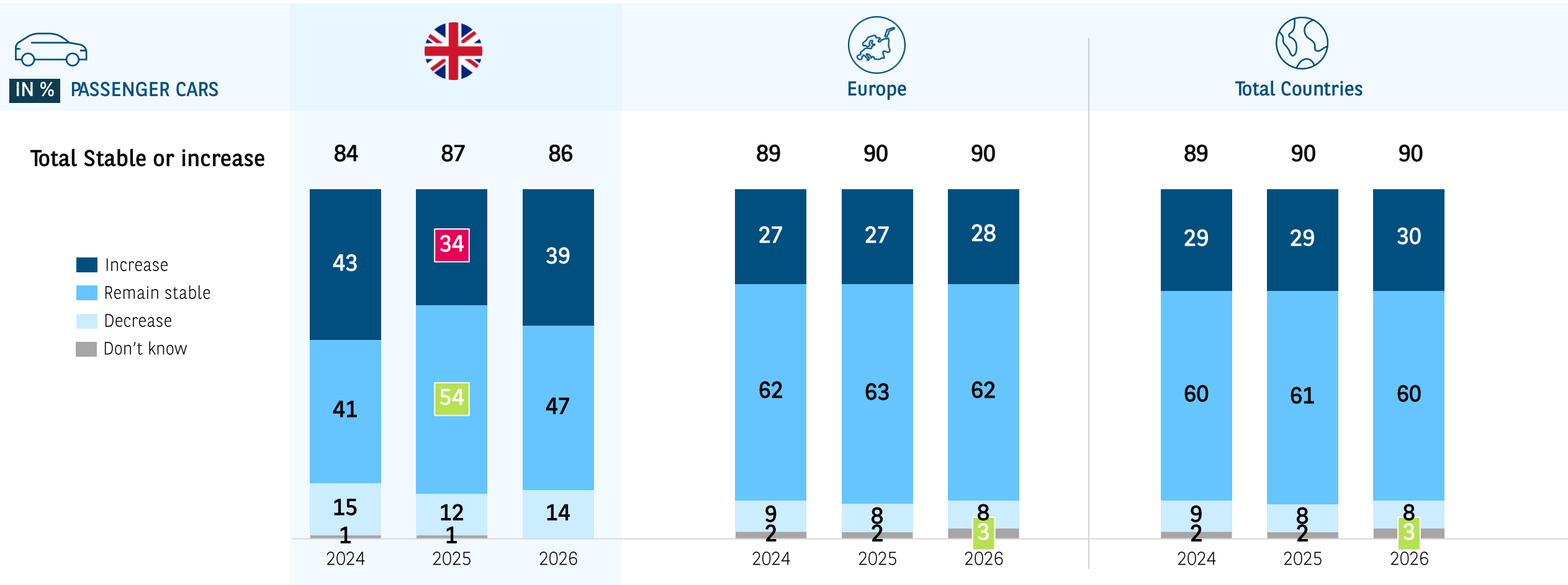
Basis: companies with corporate vehicles = 100%



PASSENGER CAR FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

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



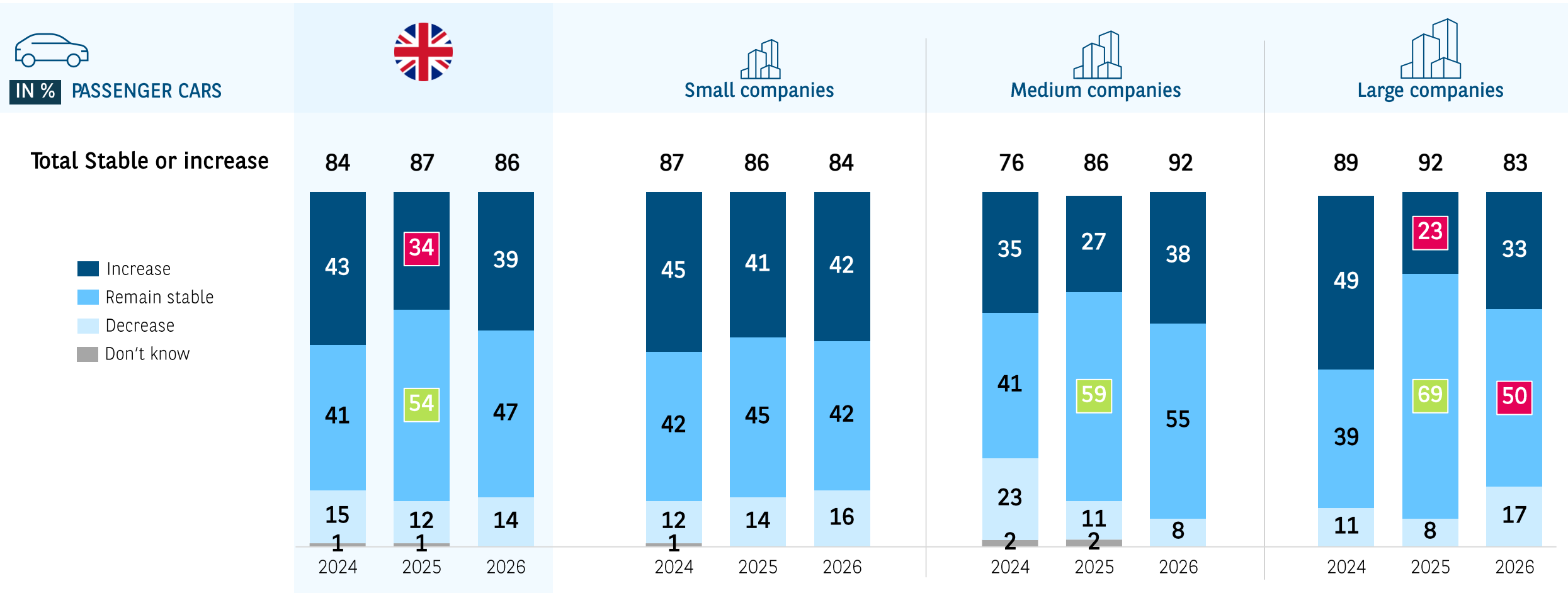
A9. In the next three years, do you think that the total number of your passenger cars will...?
 Basis: companies with passenger cars

X% Significantly higher / lower vs. previous wave

PASSENGER CAR FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In United Kingdom 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

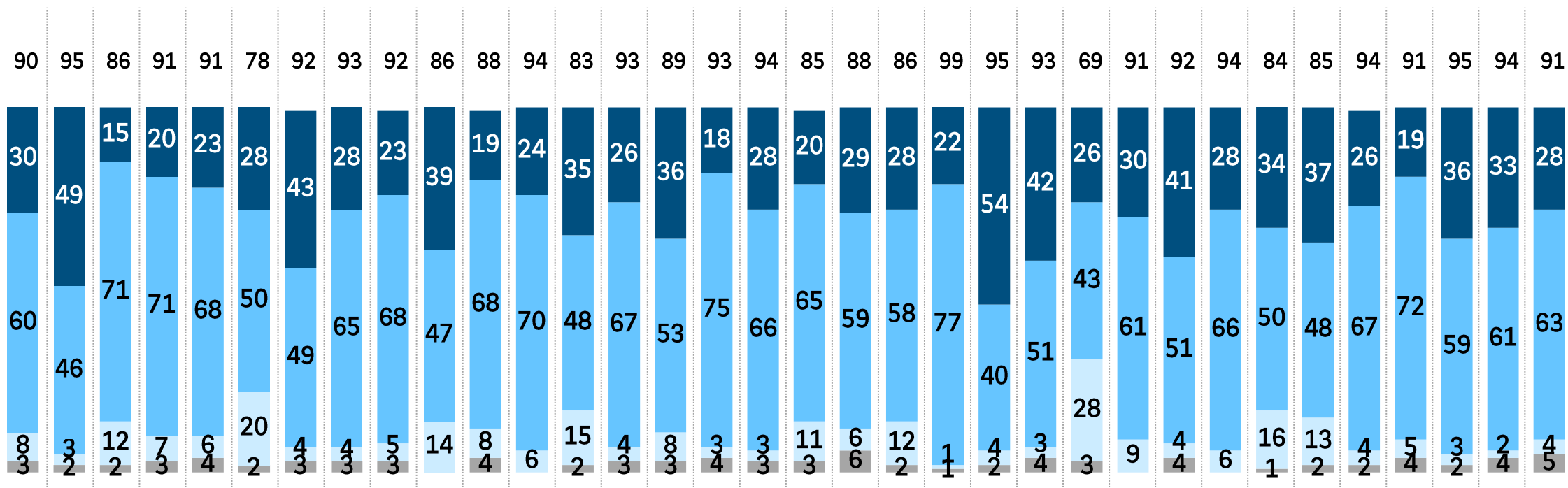
PASSENGER CAR FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

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



IN % PC

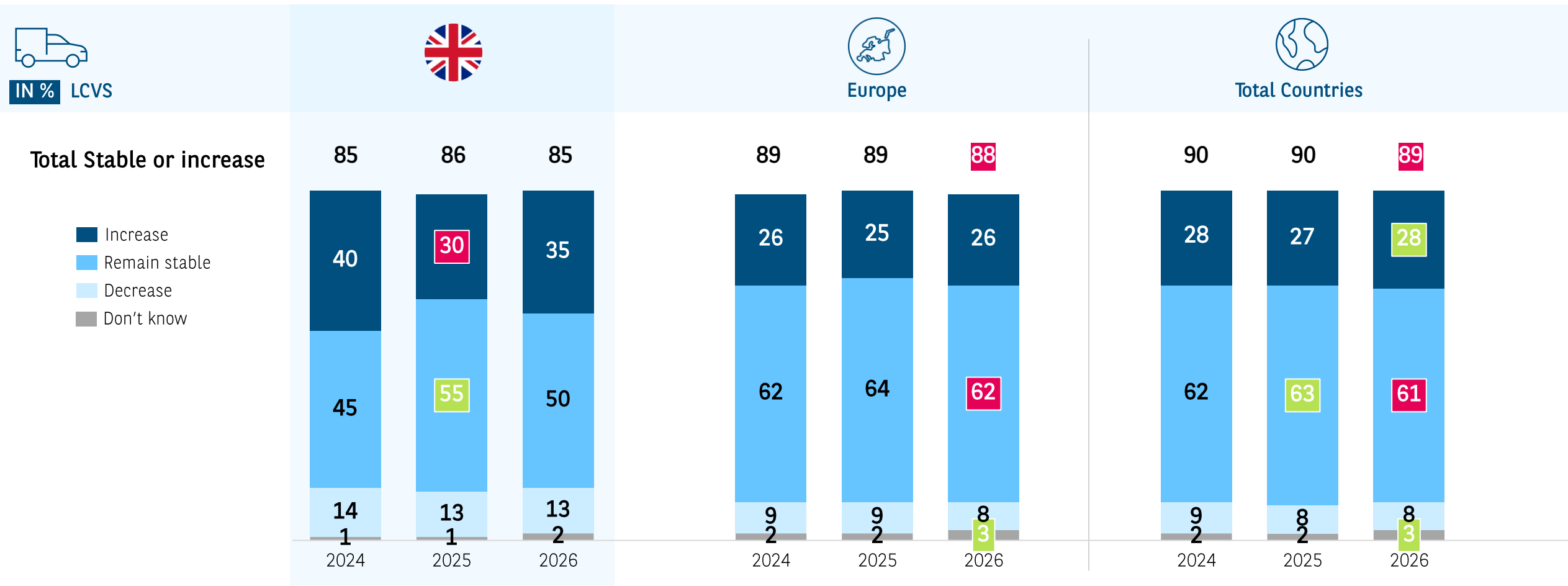


A9. In the next three years, do you think that the total number of your passenger cars will...?
Basis: companies with passenger cars

LCV FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 85% of the companies expect their LCV fleet to remain stable or to increase in the next 3 years.



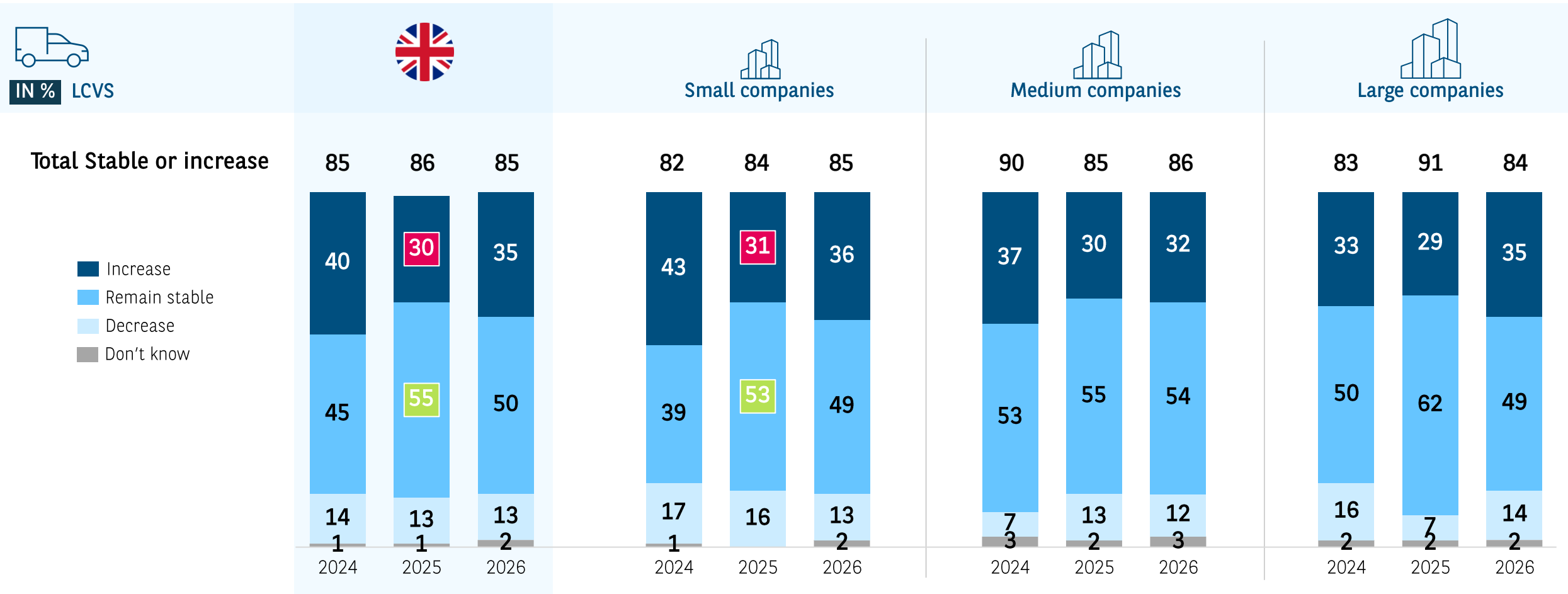
A10. In the next three years, do you think that the total number of your light commercial vehicles or vans will...?
Basis: companies with LCVs

X% Significantly higher / lower vs. previous wave

LCV FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 85% 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 United Kingdom in 2026, 85% of the companies expect their LCV fleet to remain stable or to increase in the next 3 years.

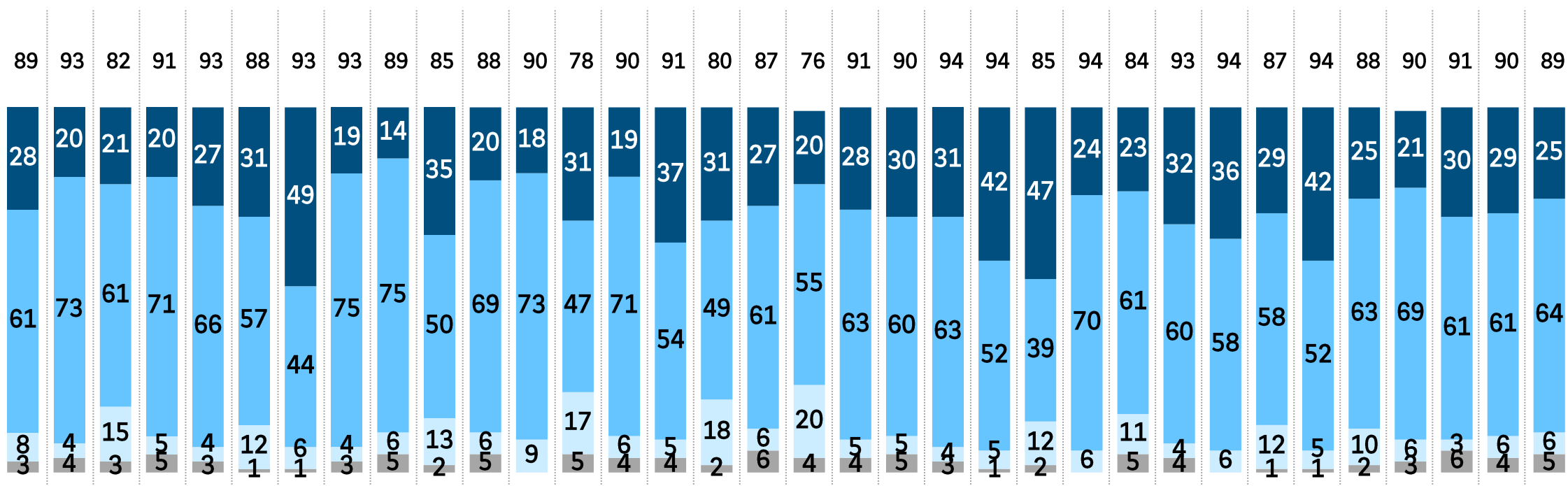


IN % LCVS



Total Stable or increase

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



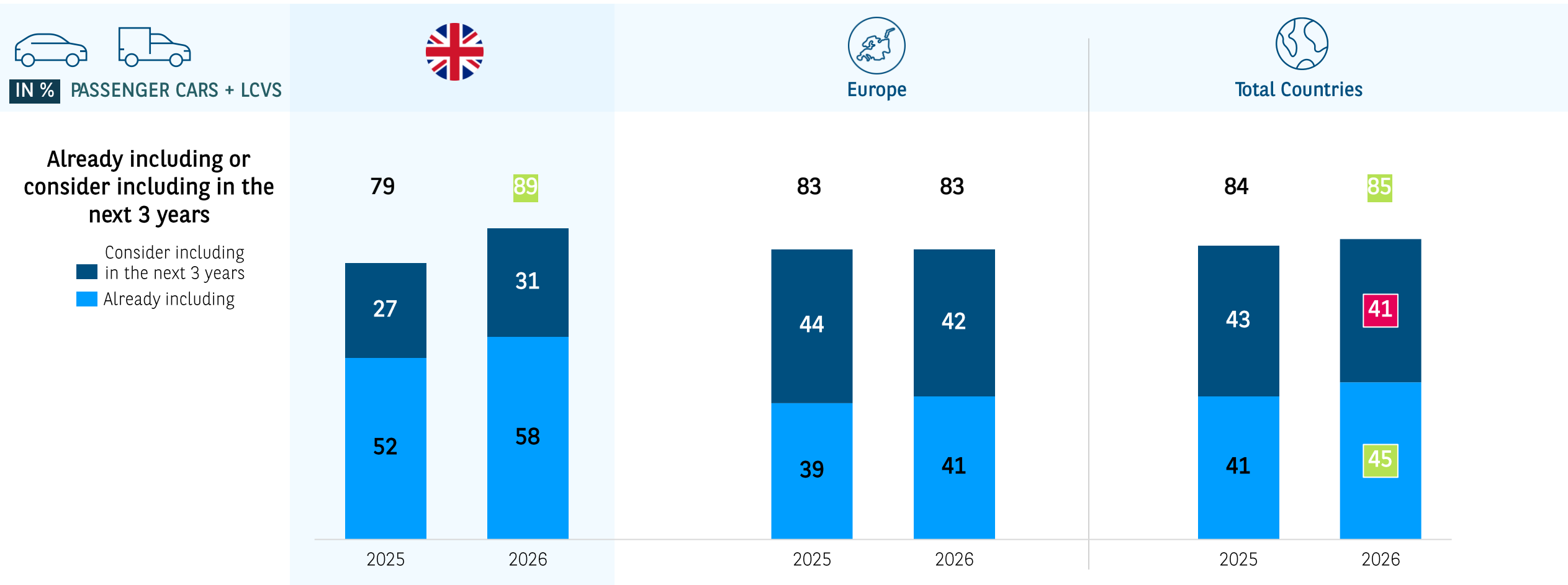
A10. In the next three years, do you think that the total number of your light commercial vehicles or vans will...?
Basis: companies with LCVs



USED / SECOND-HAND VEHICLES POSSESSION

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 89% of the companies are already including vehicles that were not new when acquired or are considering doing so in the next 3 years.



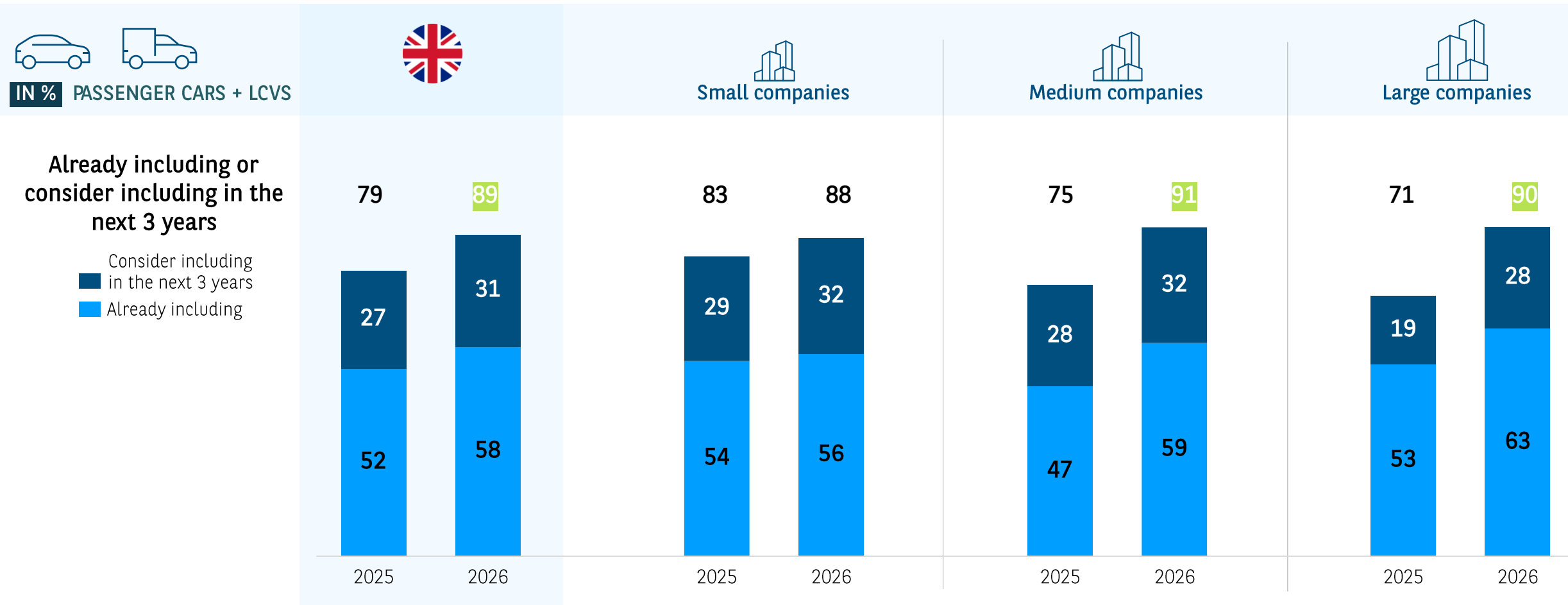
A14. Does your fleet include vehicles that were not new when you acquired them, or do you consider including some in the next 3 years?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

USED / SECOND-HAND VEHICLES POSSESSION

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 89% of the companies are already including vehicles that were not new when acquired or are considering doing so in the next 3 years.



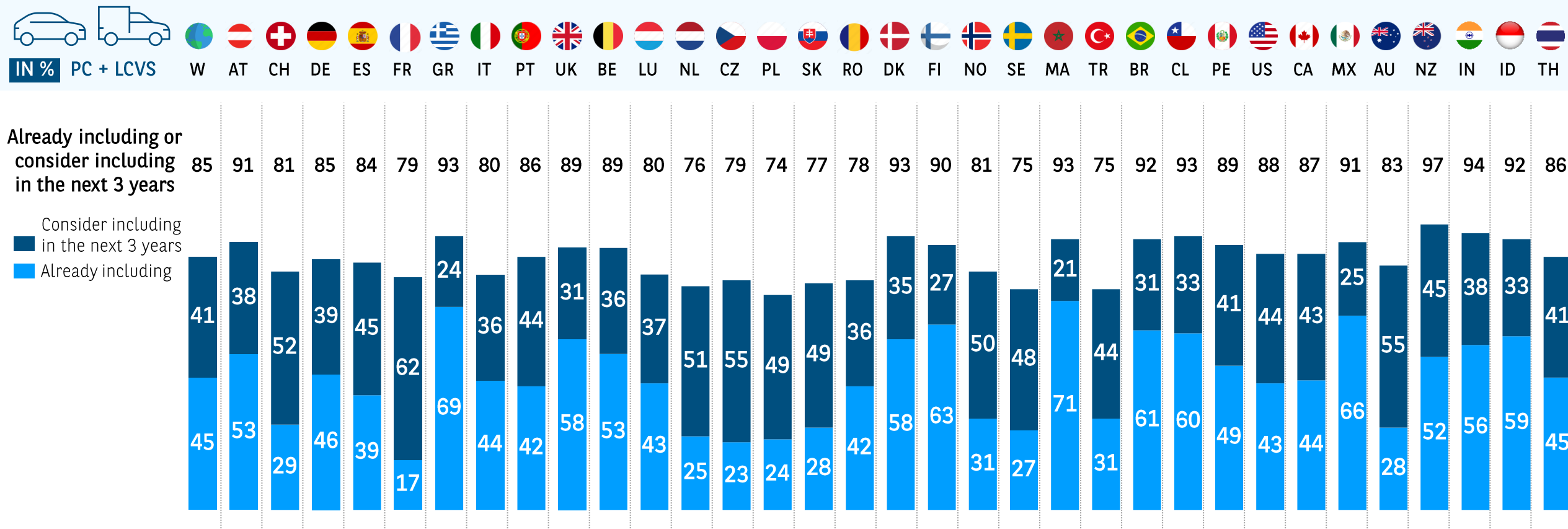
A14. Does your fleet include vehicles that were not new when you acquired them, or do you consider including some in the next 3 years?
Basis: companies with corporate vehicles = 100%

X% Significantly higher/lower vs. previous wave

USED / SECOND-HAND VEHICLES POSSESSION

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 89% of the companies are already including vehicles that were not new when acquired or are considering doing so in the next 3 years.



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

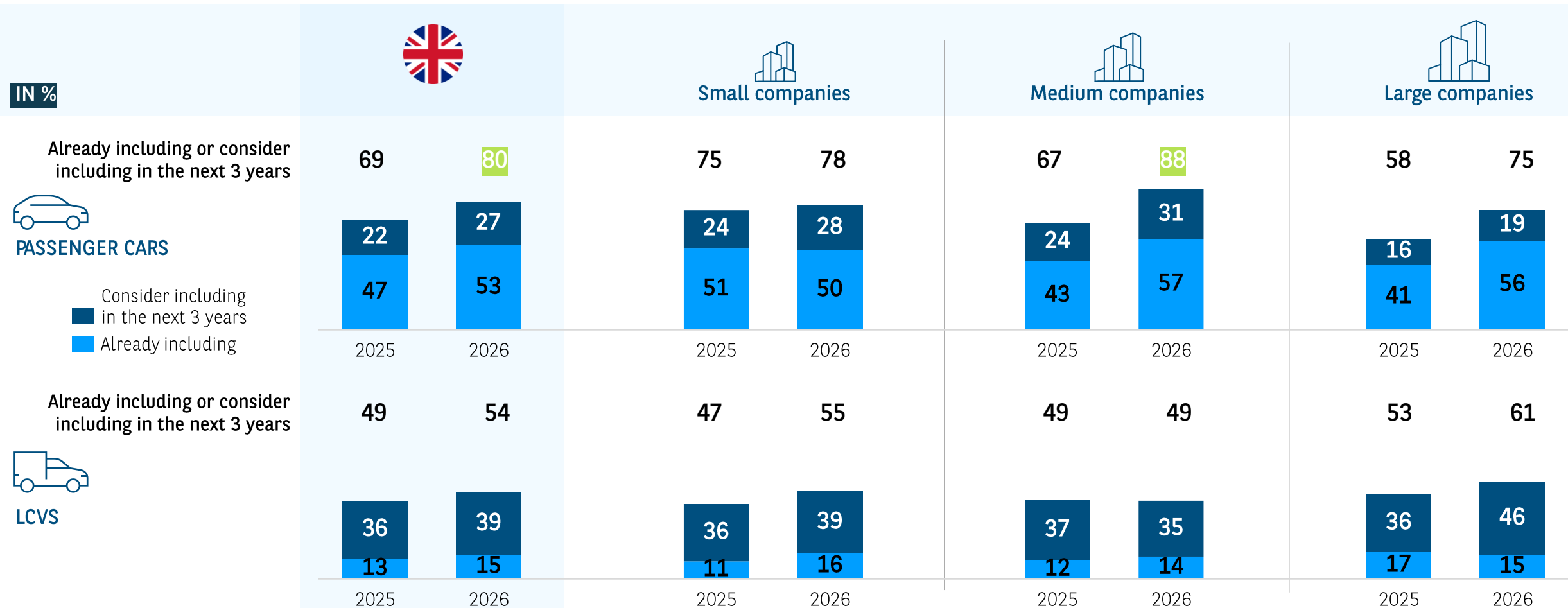
Basis: companies with corporate vehicles = 100%



USED / SECOND-HAND VEHICLES POSSESSION

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 80% of the companies are already including or are considering including passenger cars that were not new when acquired. 54% 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 United Kingdom in 2026, 80% of the companies are already including or are considering including passenger cars that were not new when acquired. 54% of the companies are already including or are considering including LCVs that were not new when acquired.

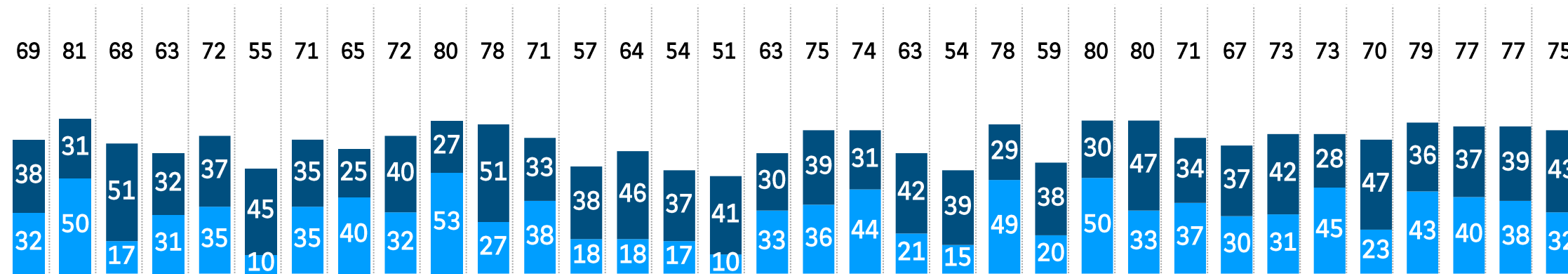
IN %



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

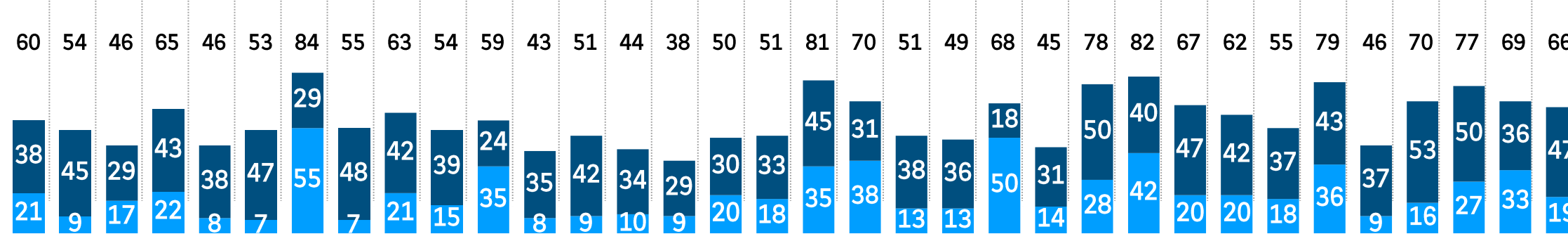
Already including or consider including in the next 3 years

PASSENGER CARS
 Consider including in the next 3 years
 Already including



Already including or consider including in the next 3 years

LCVS
 Consider including in the next 3 years
 Already including



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

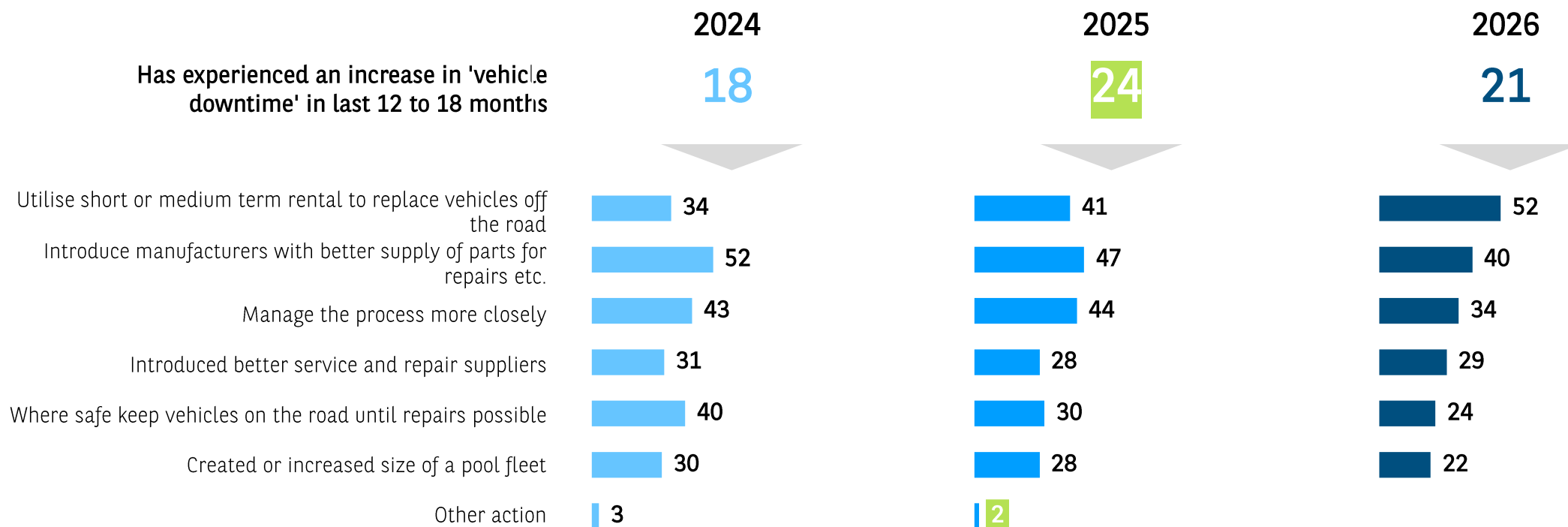
HOW TO READ THE RESULTS ?

In 2026, 21% of the companies have experienced an increase in 'vehicle downtime' in the last 12 to 18 months. Among them, 52% declare that the main action to manage this increase is: Utilise short or medium term rental to replace vehicles off the road.

Local question



IN % PASSENGER CARS + LCVS



UK80. Have you experienced an increase in 'vehicle downtime' in the last 12 to 18 months?

Basis: companies with corporate vehicles = 100%

UK82. What actions have you taken to manage this increase?

Basis: companies dealing with vehicle downtime increase

X% Significantly higher / lower vs. previous wave

IMPACT OF NEW ENTRANTS ON MANUFACTURERS CHOICE

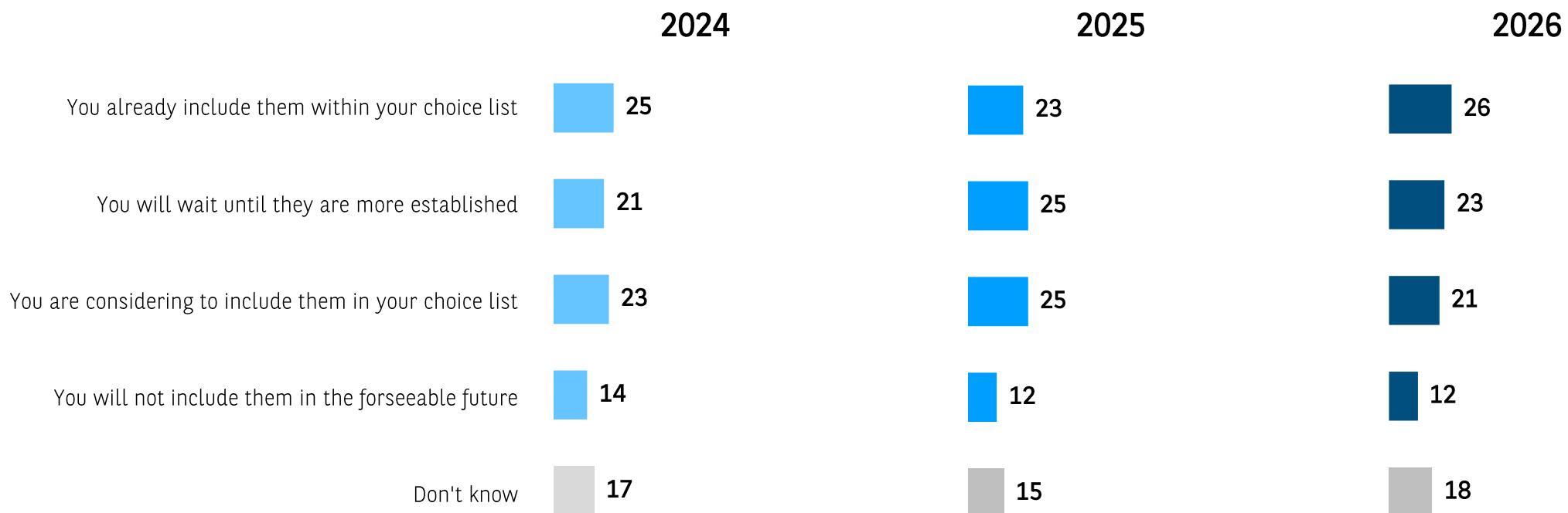
HOW TO READ THE RESULTS ?

In 2026, 26% of the companies declare that the main impact of new entrants on their choice of manufacturers within their fleet policy is: You already include them within your choice list.



IN % PASSENGER CARS + LCVS

Local question



UK79. With new entrants emerging, how will this impact on your choice of manufacturers within your fleet policy?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

02

FINANCING METHODS

How do companies finance their fleets?



Operational/Full-service leasing remains significantly below Financial leasing as the main financing method in the UK

16% of UK companies currently use Operational leasing as the main financing method for their fleets, while they were 23% in 2024 and when 28% of companies across Europe do so.

Outright/direct purchase and financial leasing are the predominant financing methods used, accounting for 41% and 34% of companies, respectively.

The penetration rate of Operational leasing is stronger in Large companies (26% vs. 13% in small and 14% in medium companies).

A similar use of the Operational/Full-service leasing for second-hand vehicles

Among companies using or considering second-hand vehicles, 17% use Operational leasing as their main financing method, or plan to do so if considering second-hand vehicles.

The growth potential for Operational leasing is strong, especially among Large companies.

34% of UK companies intend to introduce or increase their use of Operational leasing for fleet financing, in line with last year's trend (32% in 2025) and on par with the European average (36%).

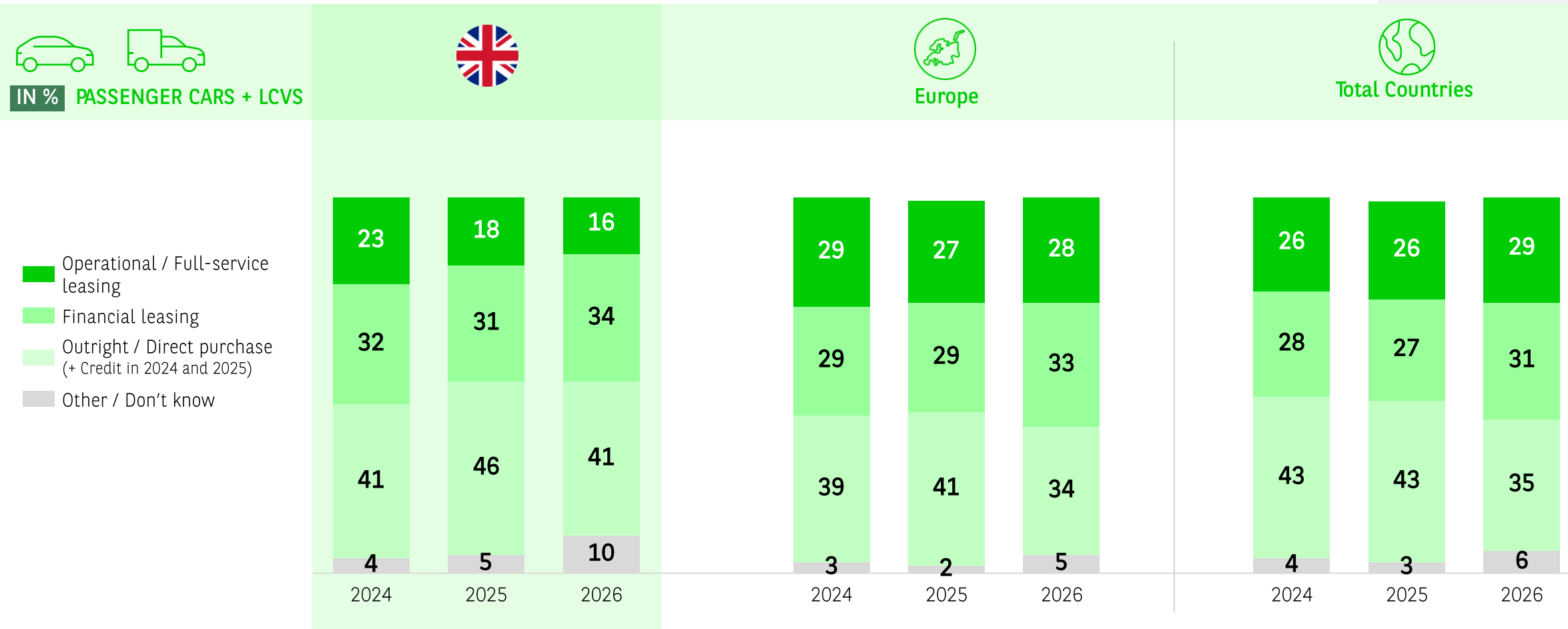
The consideration for operational leasing increases with company size: from 28% within small companies to 35% within medium companies and 45% within large companies.

MAIN FLEET FINANCING METHOD

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 16% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their company vehicles.

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



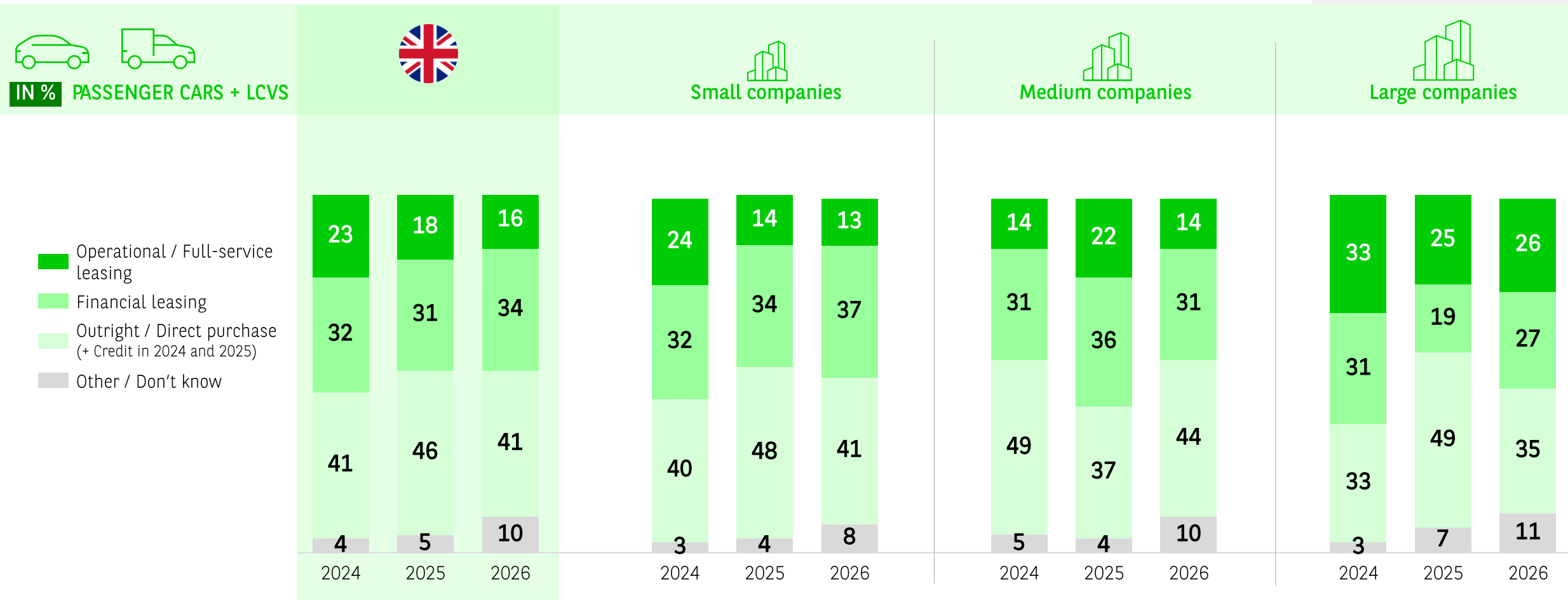
B2. What is the main method used to finance your company vehicles today?
Basis: companies with corporate vehicles = 100%

MAIN FLEET FINANCING METHOD

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 16% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their company vehicles.

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



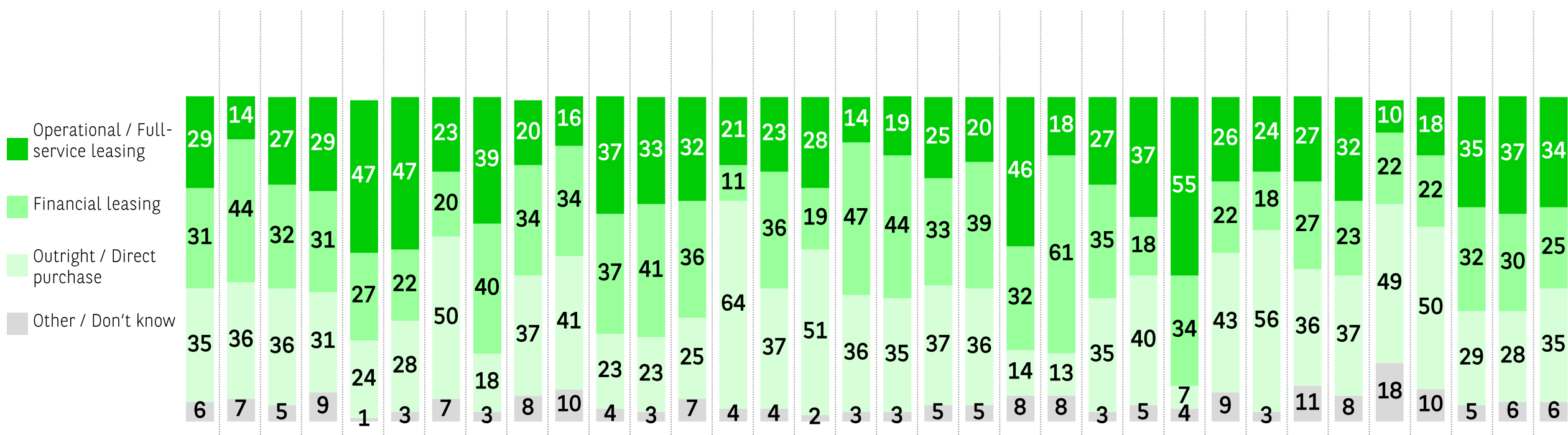
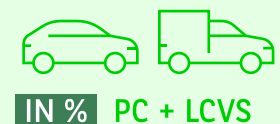
B2. What is the main method used to finance your company vehicles today?
Basis: companies with corporate vehicles = 100%

MAIN FLEET FINANCING METHOD

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 16% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their company vehicles.

Item "Credit" deleted in 2026



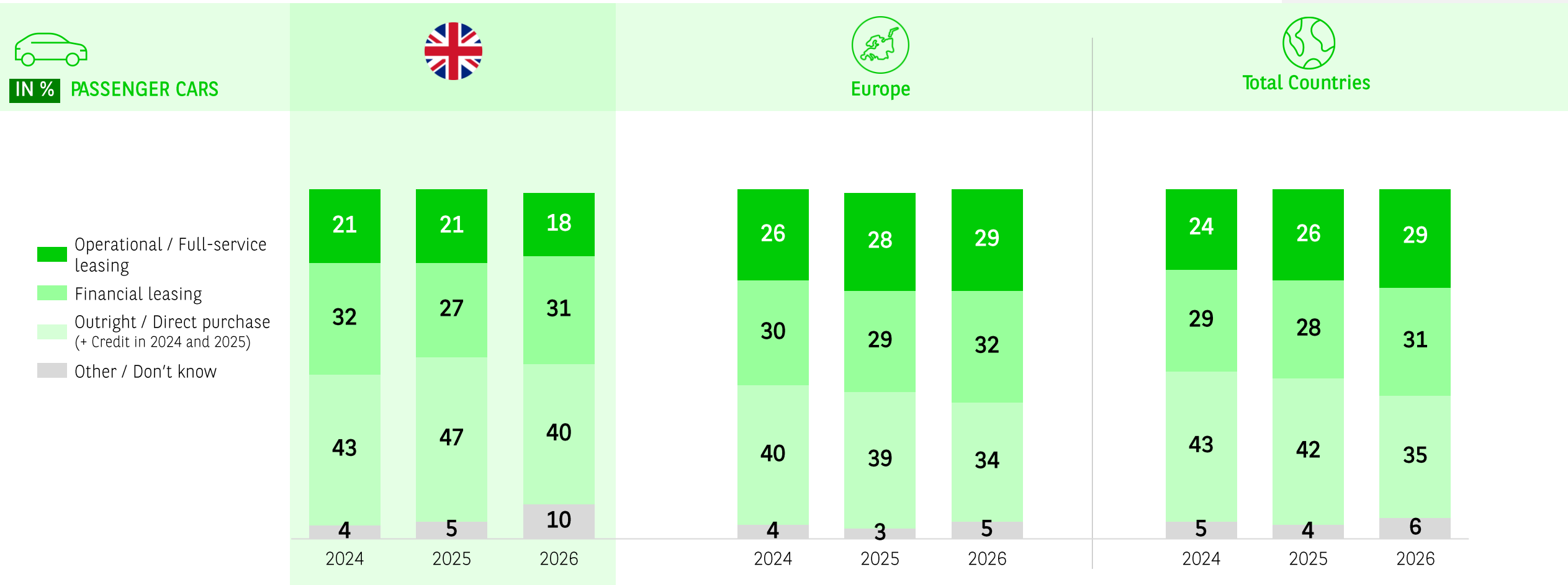
B2. What is the main method used to finance your company vehicles today?
Basis: companies with corporate vehicles = 100%

MAIN PASSENGER CARS FINANCING METHOD

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 18% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their passenger cars.

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



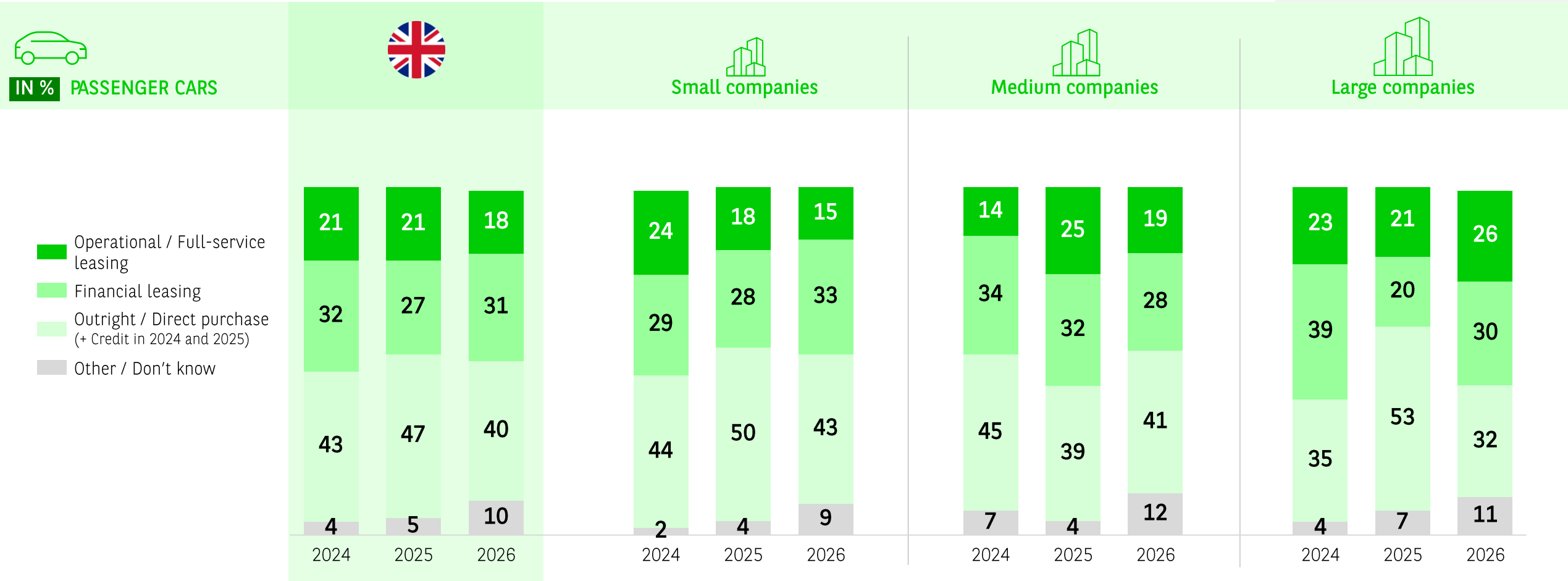
B3. And what is the main method used to finance your passenger cars today?
Basis: companies with passenger cars

MAIN PASSENGER CARS FINANCING METHOD

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 18% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their passenger cars.

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



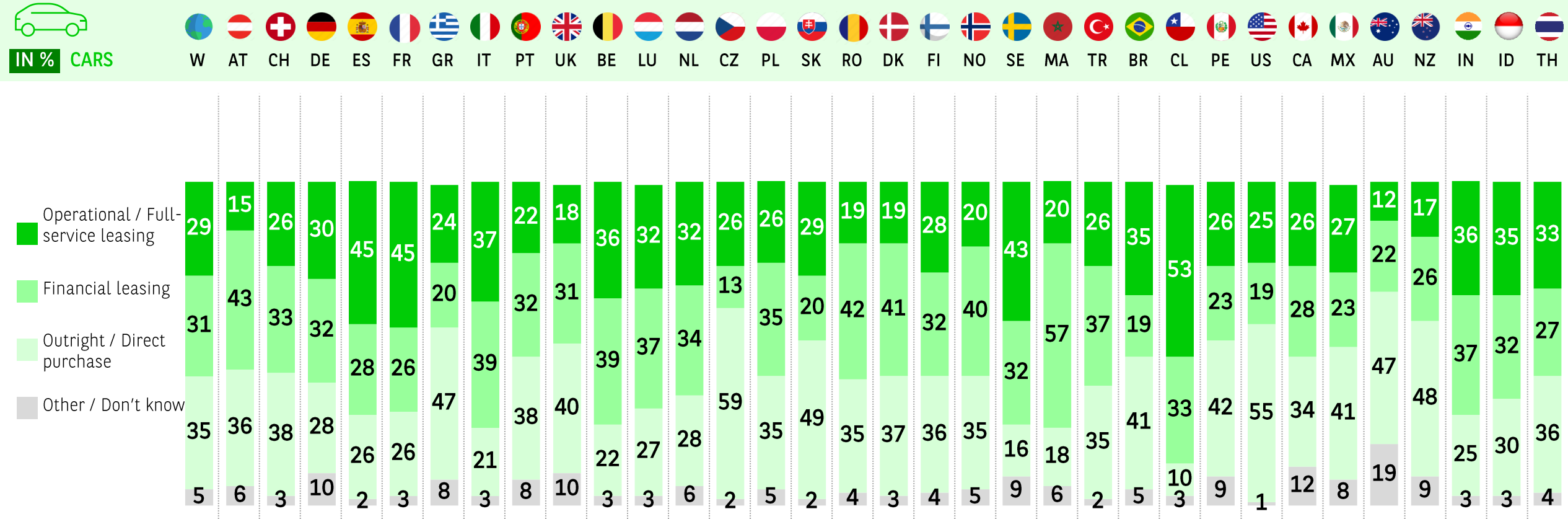
B3. And what is the main method used to finance your passenger cars today?
Basis: companies with passenger cars

MAIN PASSENGER CARS FINANCING METHOD

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 18% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their passenger cars.

Item "Credit" deleted in 2026



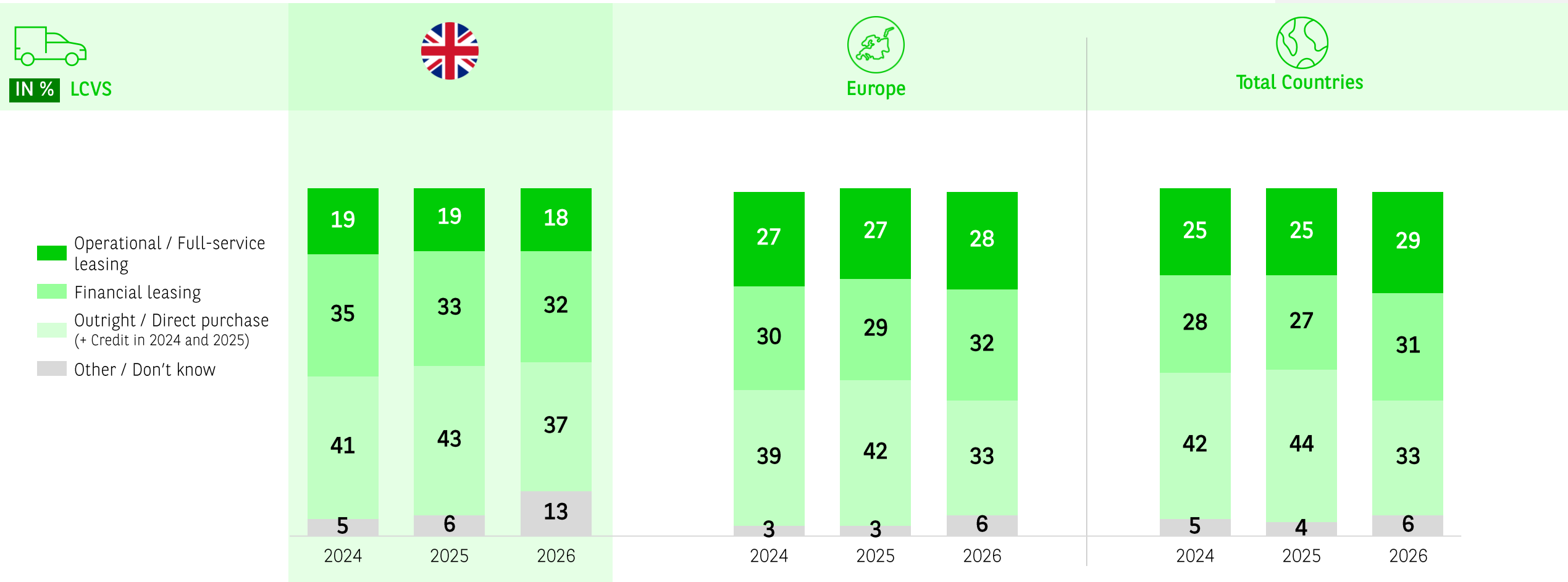
B3. And what is the main method used to finance your passenger cars today?
Basis: companies with passenger cars

MAIN LCV FINANCING METHOD

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 18% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their LCVs.

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



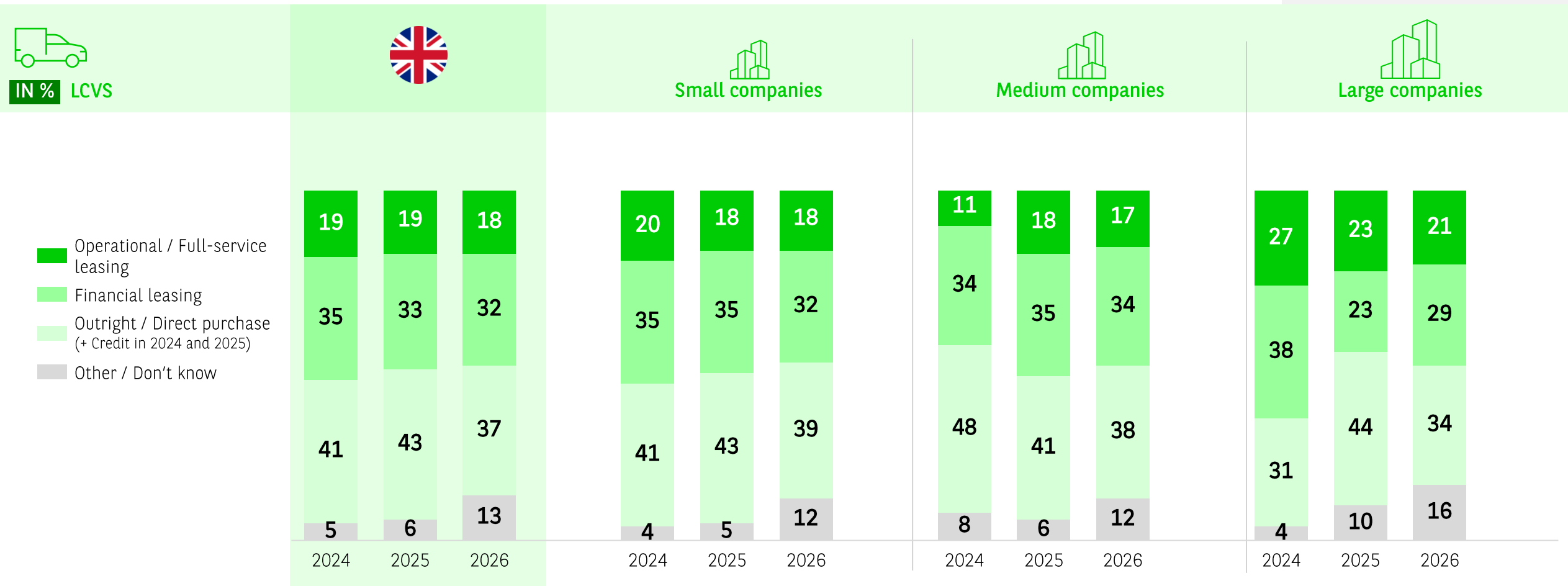
B4. And what is the main method used to finance your light commercial vehicles or vans today?
Basis: companies with LCVs

MAIN LCV FINANCING METHOD

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 18% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their LCVs.

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



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

MAIN LCV FINANCING METHOD

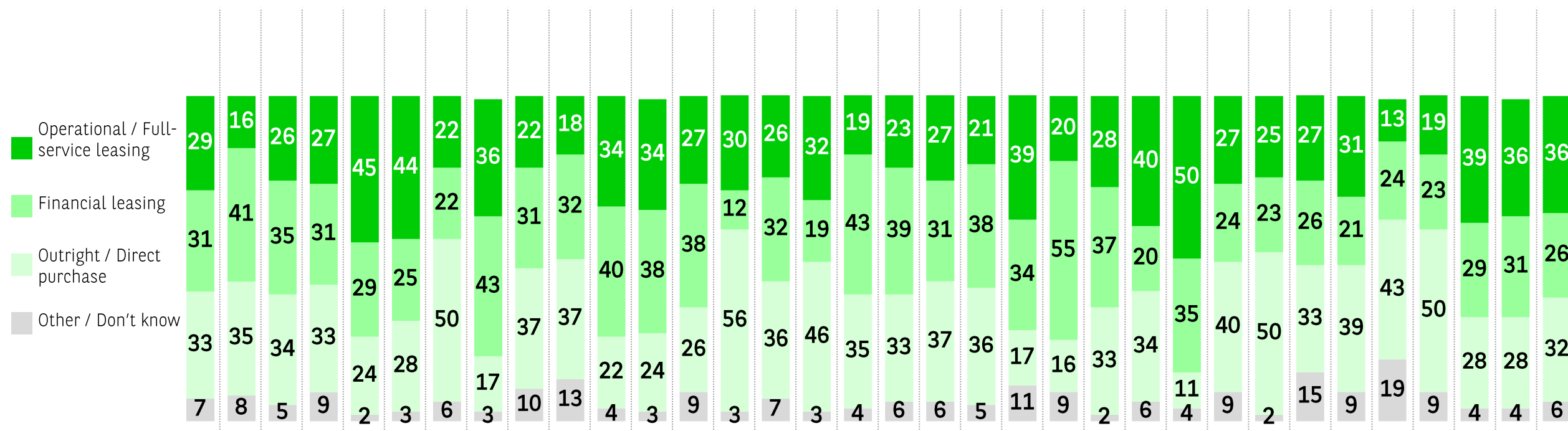
HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 18% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their LCVs.

Item "Credit" deleted in 2026



IN % LCVS



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

Basis: companies with LCVs

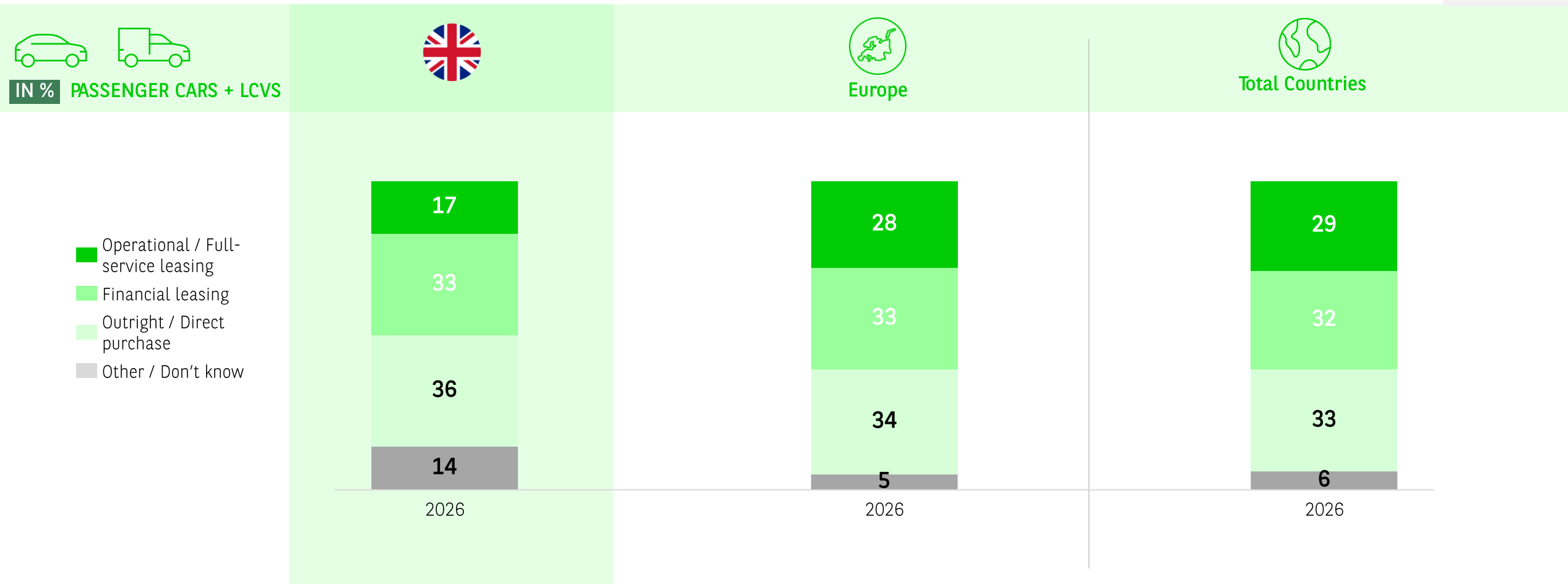


MAIN FLEET FINANCING METHOD FOR SECOND-HAND VEHICLES

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 17% of the companies considering or having second-hand vehicles are (plan on) using Operational Leasing / Full-Service Leasing as main method to finance their company second-hand vehicles.

New question



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

MAIN FLEET FINANCING METHOD FOR SECOND-HAND VEHICLES

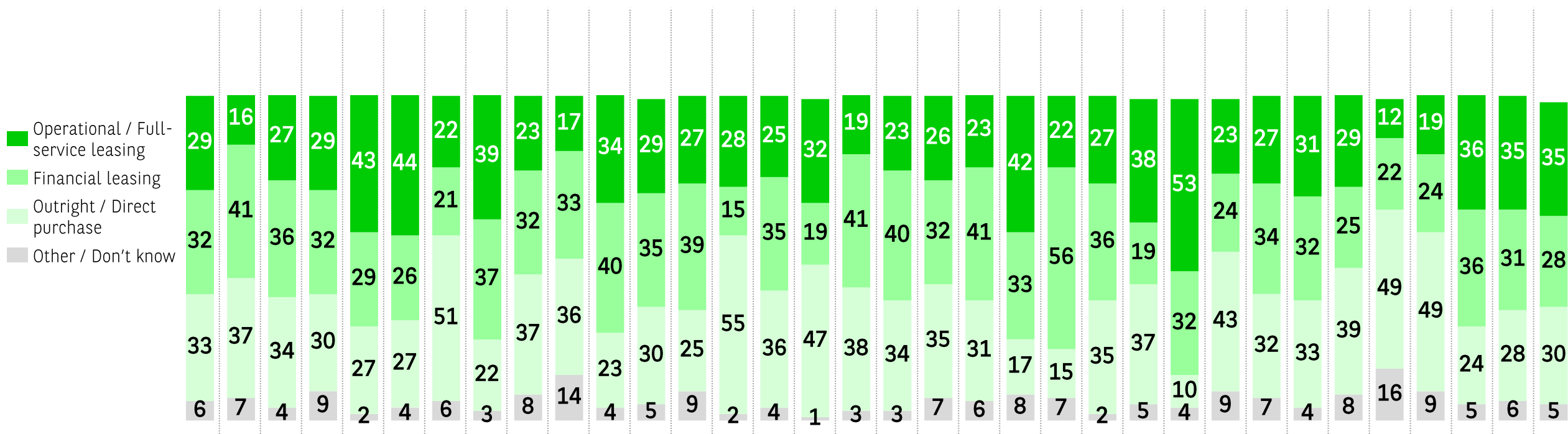
HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 17% of the companies considering or having second-hand vehicles are (plan on) using Operational Leasing / Full-Service Leasing as main method to finance their company second-hand vehicles.

New question



IN % PC + LCVS

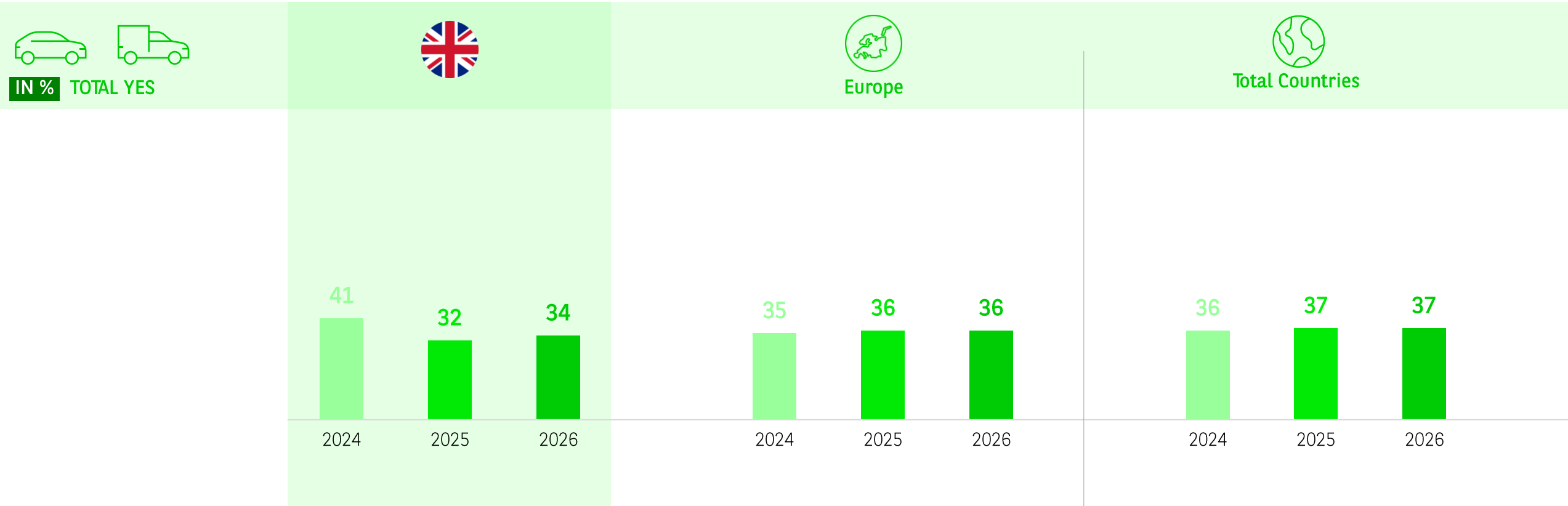


B5. What is the (planned) main method currently used to finance the second-hand vehicles in your fleet?
Basis: companies considering or having corporate second-hand vehicles"

INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATIONAL LEASING

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 34% of the companies intend to introduce or increase the use of Operational Leasing / Full-Service Leasing to finance their corporate fleet in the next three years.



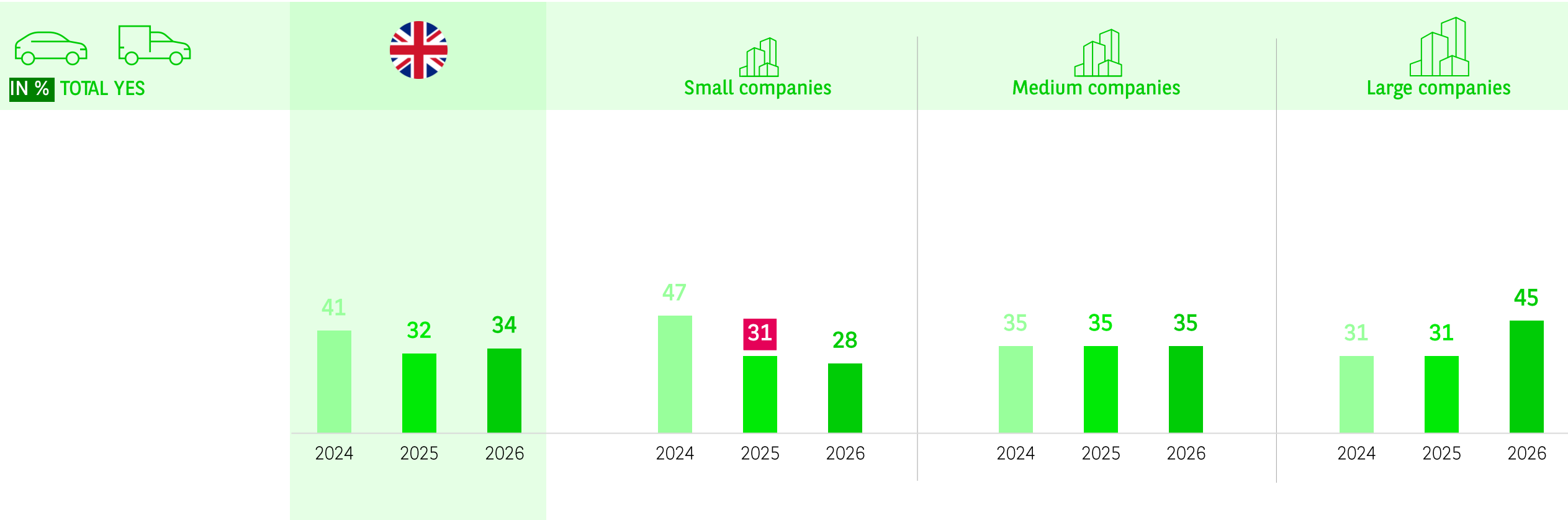
B8bis. In the next three years do you intend to either introduce or increase the use of Operational Leasing / Full-Service Leasing to finance your corporate fleet?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATIONAL LEASING

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 34% of the companies intend to introduce or increase the use of Operational Leasing / Full-Service Leasing to finance their corporate fleet in the next three years.



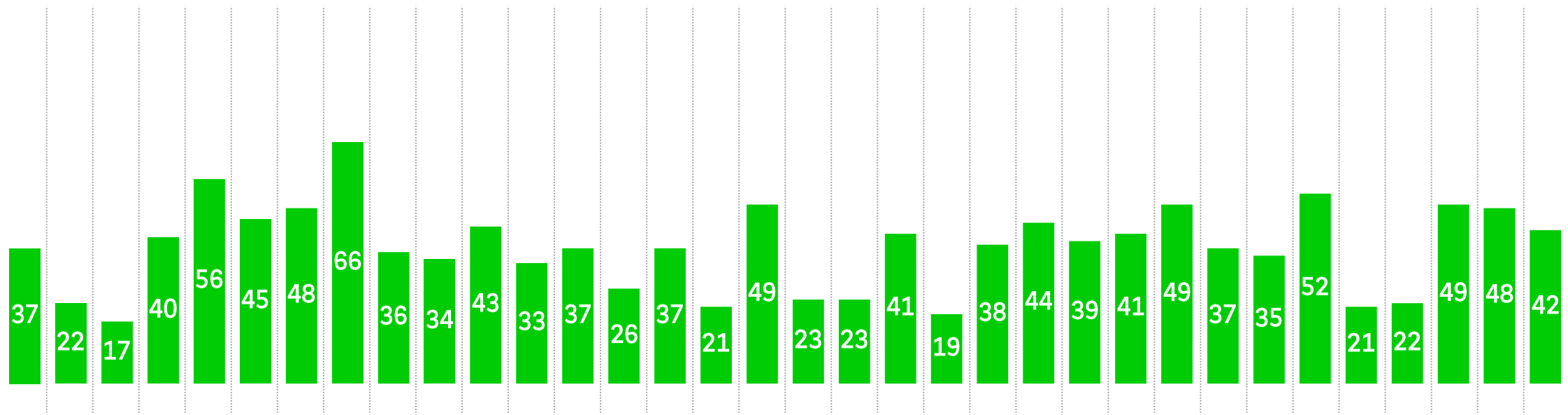
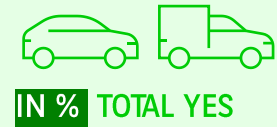
B8bis. In the next three years do you intend to either introduce or increase the use of Operational Leasing / Full-Service Leasing to finance your corporate fleet?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATIONAL LEASING

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 34% of the companies intend to introduce or increase the use of Operational Leasing / Full-Service Leasing to finance their corporate fleet in the next three years.



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



03

ENERGY MIX

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



Passenger car fleet electrification is very strong in the UK

83% of companies in the UK have implemented at least one type of electrified technology (HEV, PHEV or BEV) for passenger cars, with additional 11% considering this move. This adoption rate exceeds the European average (57%) and ranks among the highest in Europe, comparable to level seen in Nordic markets.

This pattern remains consistent across different company sizes.

HEV and PHEV are the preferred technologies for UK passenger cars fleets' transition

37% of companies in the UK are equipped with BEV, below HEV (51%) and PHEV (42%).

Employees' request is an increasingly compelling reason for companies to switch to electrified technologies

In 2026, the top two reasons for shifting to electrified technologies are their lower environmental impact (32%) and reduced fuel expenses (31%).

Reflecting a European trend, employee demands have become a significant motivator for this transition in passenger car fleets. In the UK, 30% of companies cite employee demand as a key factor, marking a 10-point increase and positioning it as the third reason, alongside the enhancement of the company's image, for adopting electrified technologies.

The transition to more BEVs for LCVs remains more complicated

7% of companies in the UK have adopted BEV for their LCV fleets, aligning with European average. Additionally, a significant 30% are considering this adoption, compared to 14% at the European level. Interest is particularly high among medium companies (39%) but less so among large ones (20%).

Lack of charging infrastructure remain the main barrier to electrification

The main constraint to broader EV adoption for passenger cars remains the lack of charging points, be it on streets, at home, or in corporate settings, claimed by 72% of companies in the UK.

Charging at company premises emerges as the primary charging policy

In 2026, charging at the company premises is currently or will be a part of the charging policy for 89% of fleets in the UK (passenger cars or LCVs), aligning with the European trend. Among these fleets, 54% have already installed charging stations or plan to within the next year.

Public charging follows as the second most popular option, with 69% of companies considering this approach, in line with the European average. Among these, 64% reimburse energy costs through expense claims, while others provide energy cards to drivers, like other European markets.

Home charging remains the least common practice, adopted by only 18% of companies, as well as in Europe. Most of them (87%) offer at least one charging solution to company car drivers, such as Wallboxes (61%), reinforced sockets (50%) or smart cables (14%). Financial support for home charging is prevalent, with 94% offering assistance: 46% partial, 25% lump-sums and 23% full coverage. When financial support is provided, 31% fully reimburse energy costs, and 33% provide partial reimbursement.

The UK doubts an ambitious 2030 ICE ban trajectory

48% of the companies in the UK 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. 49% of the companies would transfer the choice of mobility means to their employees by offering them a mobility budget instead of a company car. Only 3% of the companies would remove all mobility benefits from their compensation package, unless they are mandatory by law.

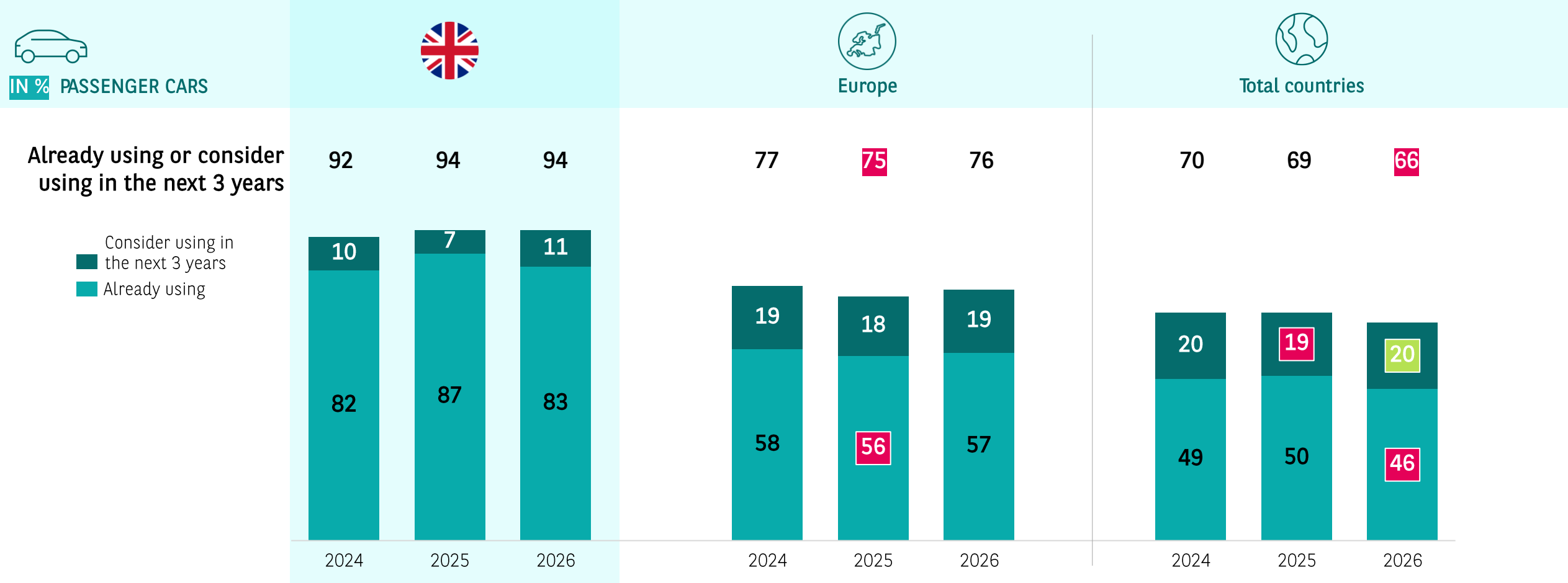
Leasing providers significantly impact energy mix decisions

Overall, 83% of companies in the UK using operational or financial leasing claim that their provider influences their energy mix choices.

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

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 94% 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.



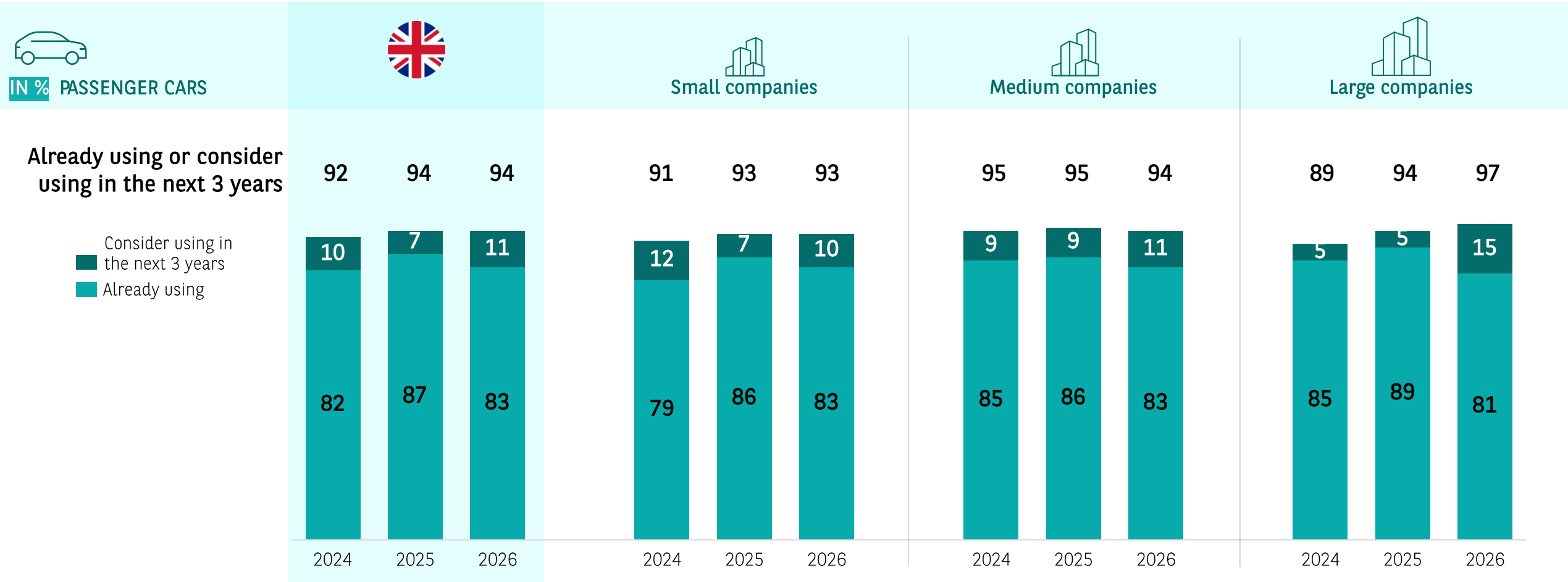
E28. Amongst the following electrified vehicles technologies, which ones do you currently use...? / E28bis. Amongst the following electrified vehicles technologies, which ones are you considering using...? Basis: companies with passenger cars

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 United Kingdom in 2026, 94% 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.



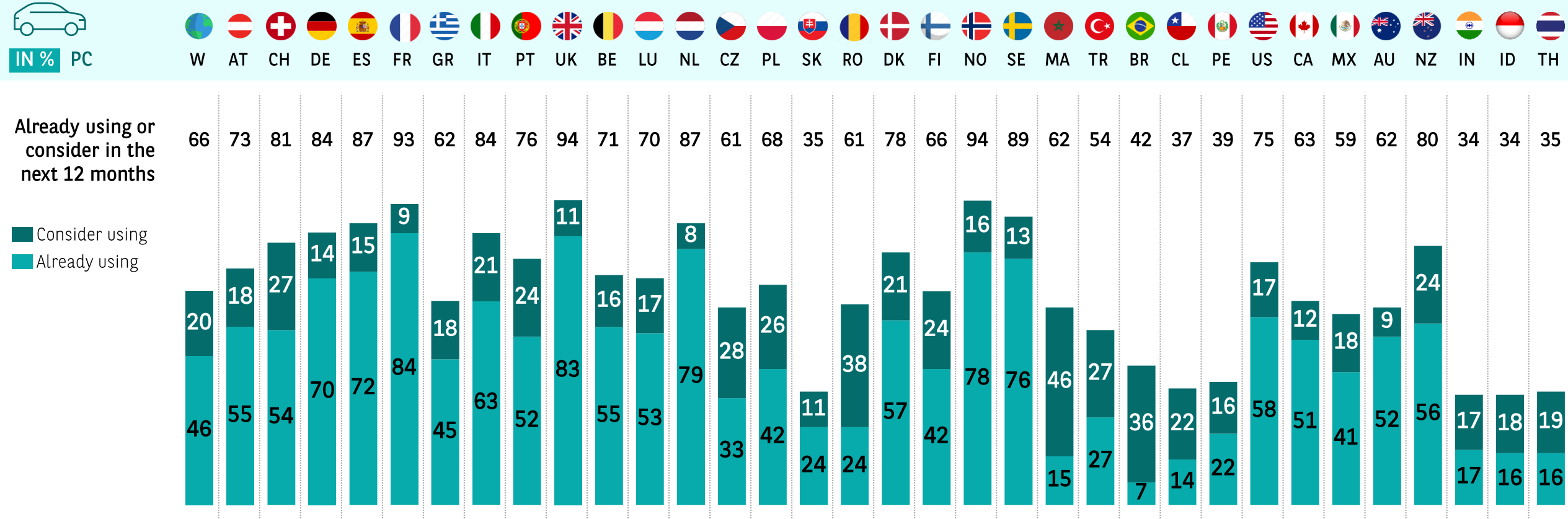
E28. Amongst the following electrified vehicles technologies, which ones do you currently use...? / E28bis. Amongst the following electrified vehicles technologies, which ones are you considering using...? Basis: companies with passenger cars

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 United Kingdom in 2026, 94% of the companies with passenger cars are already using at least one electrified vehicles technology among BEV, PHEV, HEV or are considering doing so in the next 3 years.



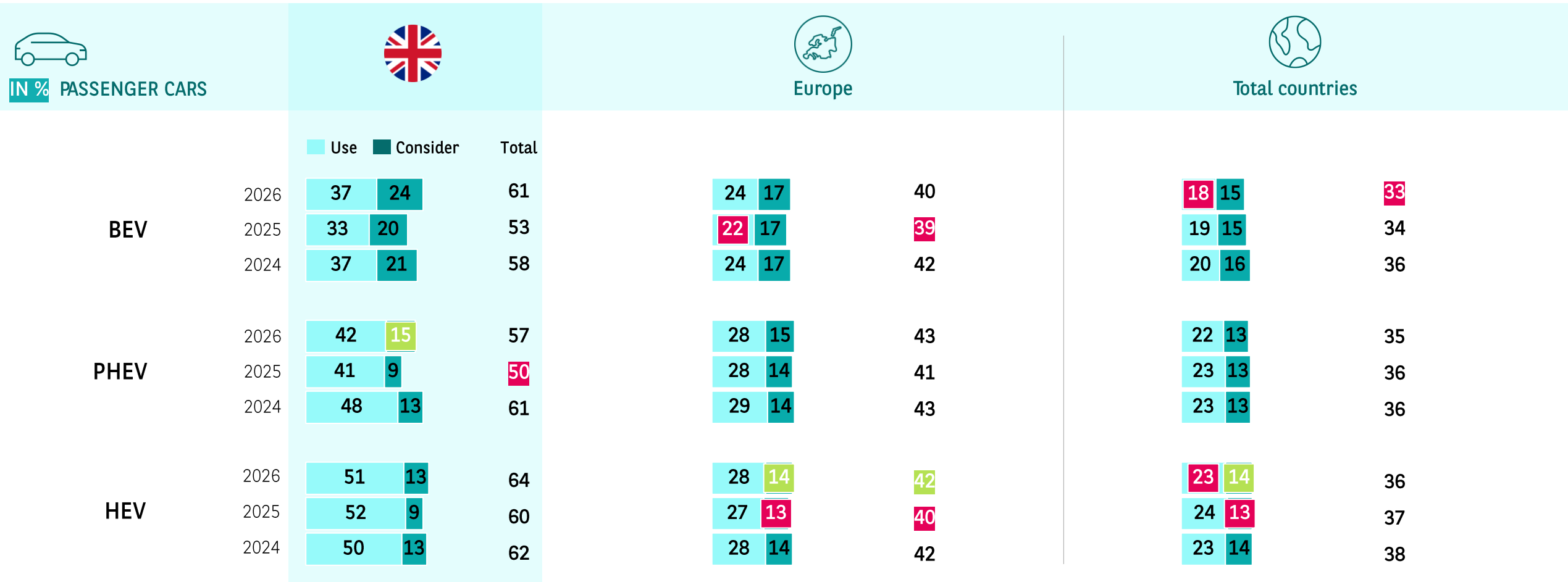
E28. Amongst the following electrified vehicles technologies, which ones do you currently use...? /
 E28bis. Amongst the following electrified vehicles technologies, which ones are you considering using...?
 Basis: companies with passenger cars

ELECTRIFIED VEHICLES TECHNOLOGIES USAGE

DETAIL PER TECHNOLOGY

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 61% of the companies with passenger cars are already using BEV or are considering using it in the next three years.



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

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

Basis: companies with passenger cars

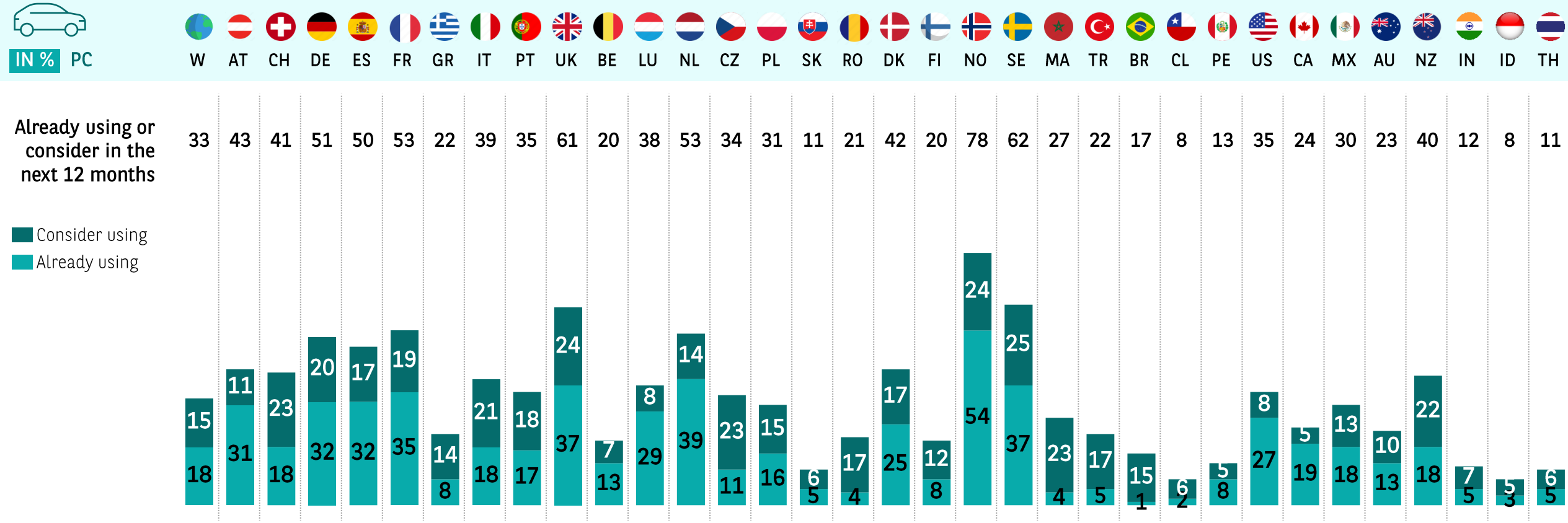
X% Significantly higher / lower vs. previous wave

ELECTRIFIED VEHICLES TECHNOLOGIES USAGE

FOCUS ON BEV

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 61% of the companies with passenger cars are already using BEV or are considering using it in the next three years.



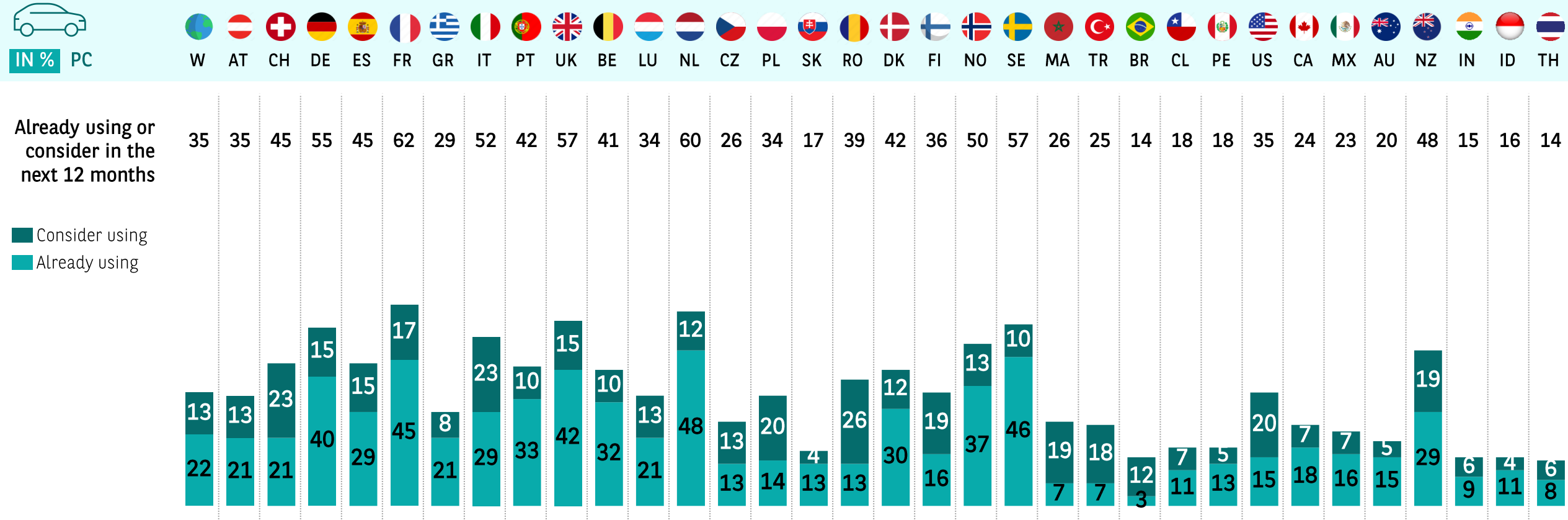
E28. Amongst the following electrified vehicles technologies, which ones do you currently use...?
 E28bis. Amongst the following electrified vehicles technologies, which ones are you considering using...?
 Basis: companies with passenger cars

ELECTRIFIED VEHICLES TECHNOLOGIES USAGE

FOCUS ON PHEV

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 57% of the companies with passenger cars are already using PHEV or are considering using it in the next three years.



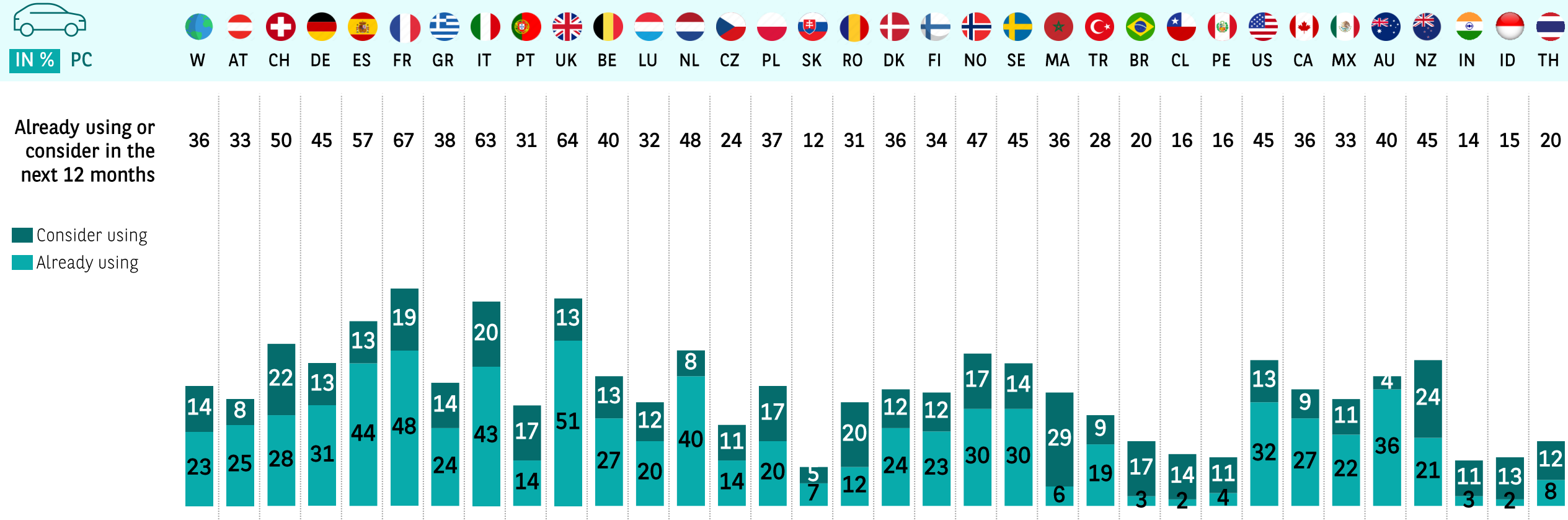
E28. Amongst the following electrified vehicles technologies, which ones do you currently use...?
 E28bis. Amongst the following electrified vehicles technologies, which ones are you considering using...?
 Basis: companies with passenger cars

ELECTRIFIED VEHICLES TECHNOLOGIES USAGE

FOCUS ON HEV

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 64% of the companies with passenger cars are already using HEV or are considering using it in the next three years.



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

REASONS FOR IMPLEMENTING ELECTRIFIED VEHICLES TECHNOLOGIES FOR PASSENGER CARS

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 32% of the companies with passenger cars are already using electrified vehicles technologies or are considering it Because of their lower environmental impact.



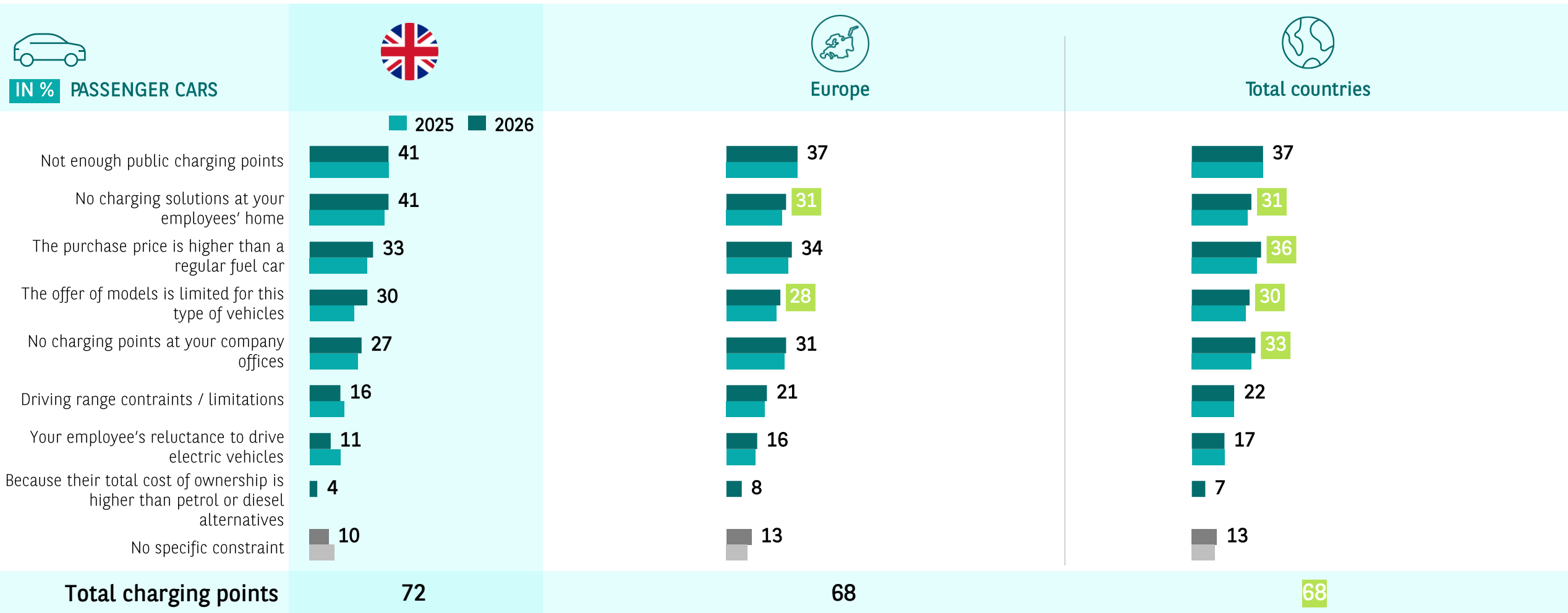
E28A. Why have you already implemented or why do you consider implementing these electrified vehicles technologies?
Basis: companies that are already using or considering using electrified vehicles technologies for passenger cars

X% Significantly higher / lower vs. previous wave

CONSTRAINTS FOR USING ELECTRIC PASSENGER CARS

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 41% of the companies with passenger cars declare that the main constraint for using electric passenger cars is: Not enough public charging points. And 72% 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

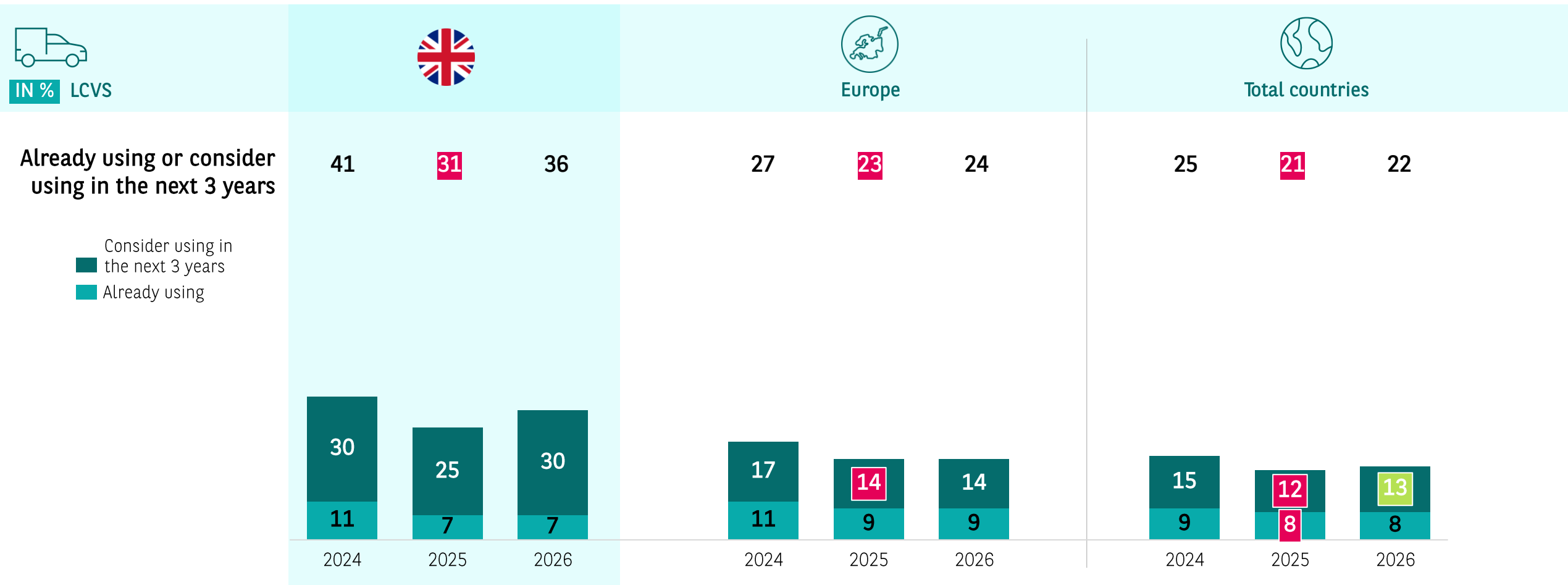
X% Significantly higher / lower vs. previous wave

ELECTRIFIED VEHICLES TECHNOLOGIES USAGE

FOCUS ON BEV

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 36% 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

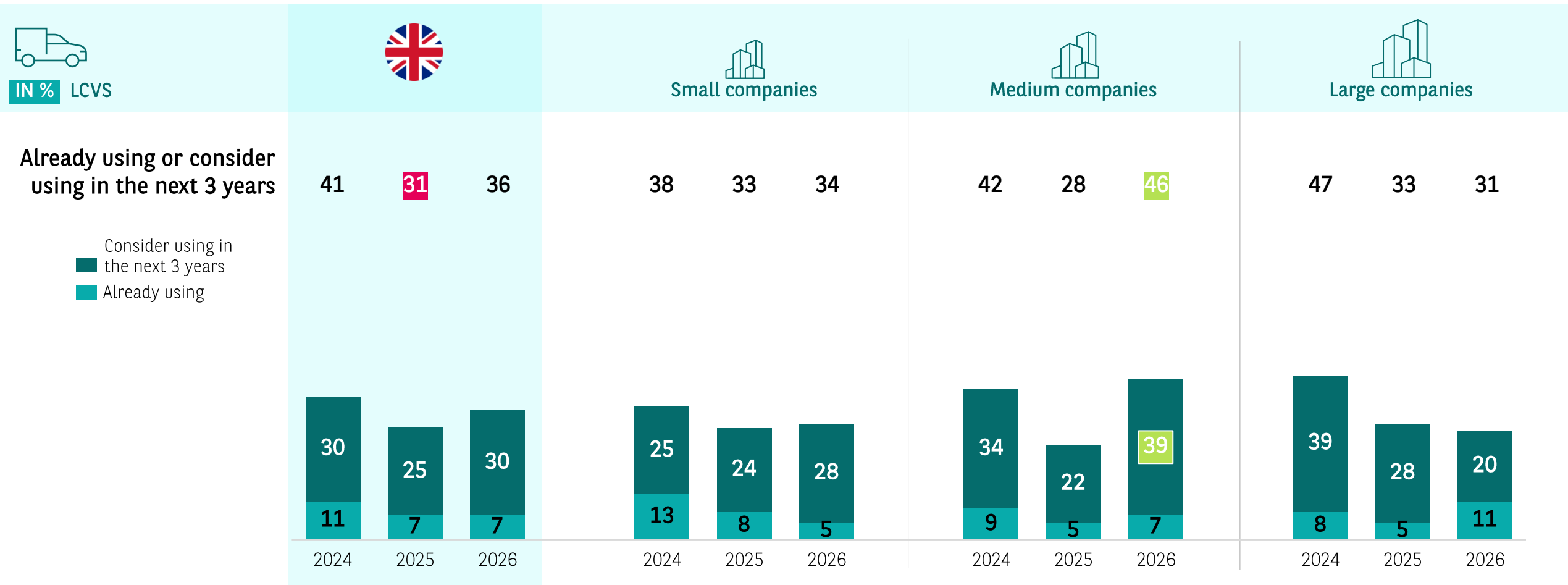
X% Significantly higher / lower vs. previous wave

ELECTRIFIED VEHICLES TECHNOLOGIES USAGE

FOCUS ON BEV

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 36% 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

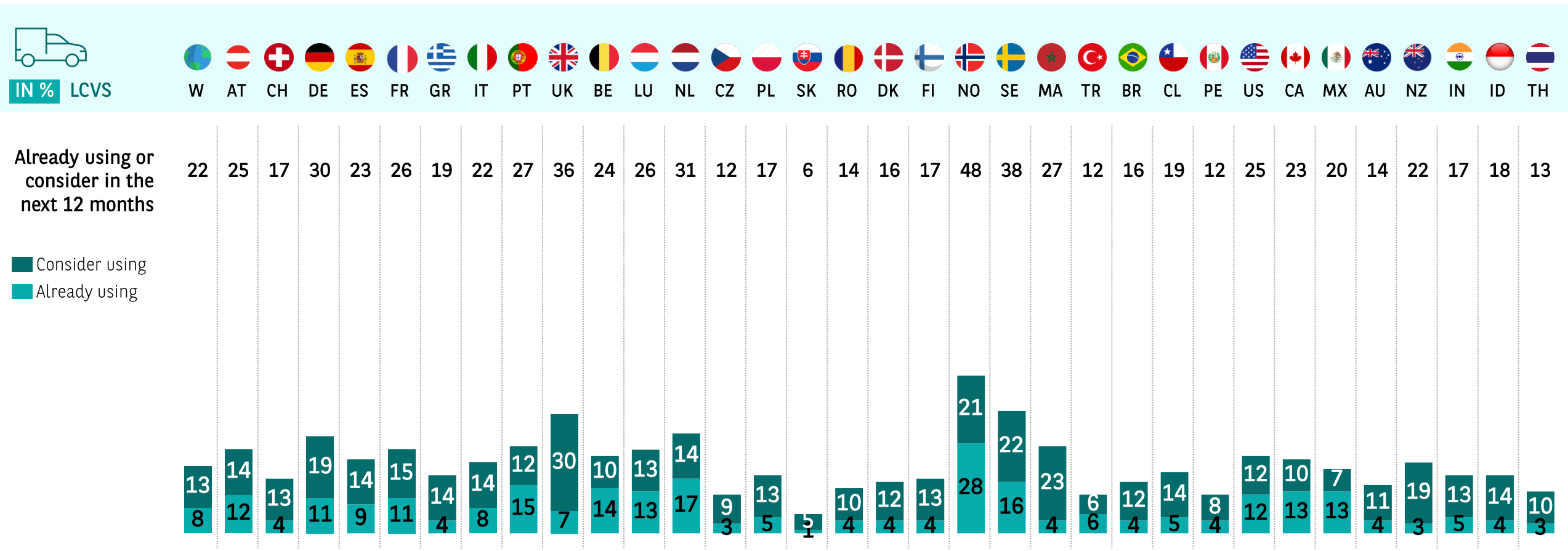
X% Significantly higher / lower vs. previous wave

ELECTRIFIED VEHICLES TECHNOLOGIES USAGE

FOCUS ON BEV

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 36% of the companies with LCVs are already using BEV or are considering using it in the next three years.



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

REASONS FOR IMPLEMENTING ELECTRIFIED VEHICLES TECHNOLOGIES FOR LCVs

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 32% of the companies with LCVs are already using electrified vehicles technologies or are considering it To be able to drive in Low Emission Zone.



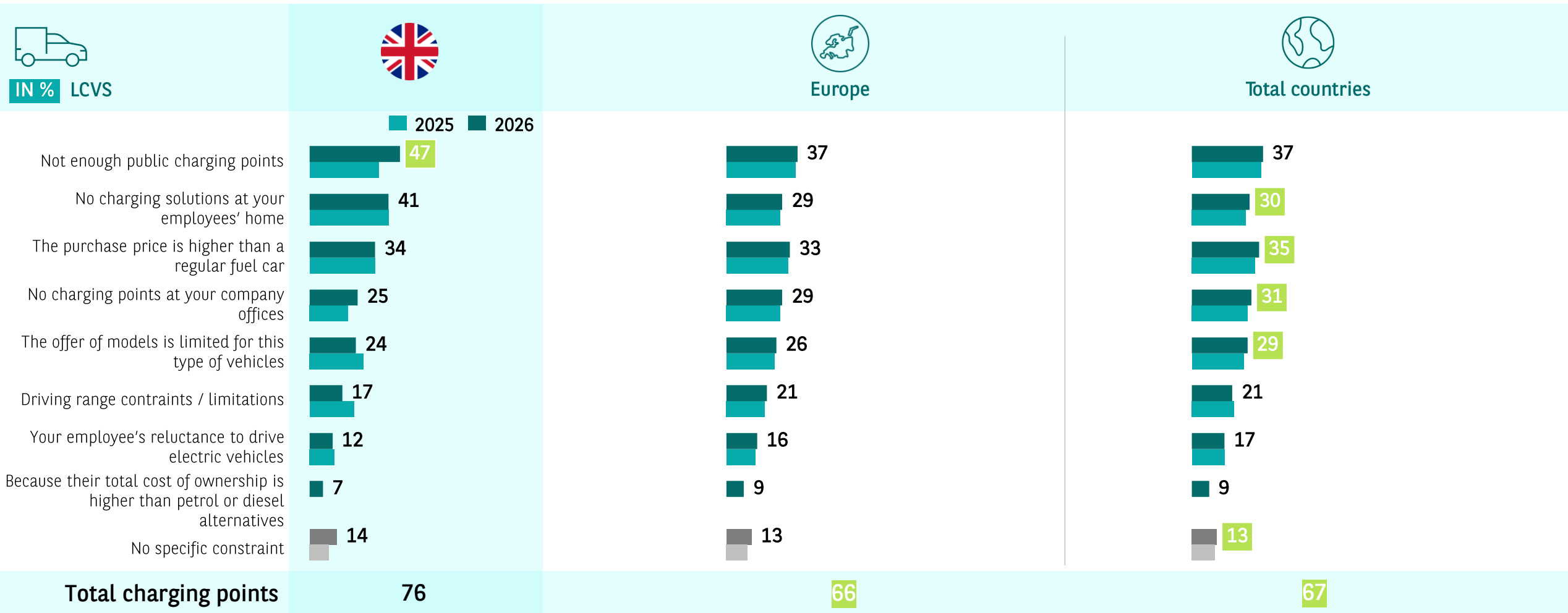
E28A. Why have you already implemented or why do you consider implementing these electrified vehicles technologies?
Basis: companies that are already using or considering using electrified vehicles technologies for LCVs

X% Significantly higher / lower vs. previous wave

CONSTRAINTS FOR USING ELECTRIC LIGHT COMMERCIAL VEHICLES

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 47% of the companies with LCVs declare that the main constraint for using electric LCVs is: Not enough public charging points. And 76% 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 United Kingdom in 2026, 100% of the companies have at least one charging policy or will have in the future for all vehicles.

New question

IN % PC + LCVS

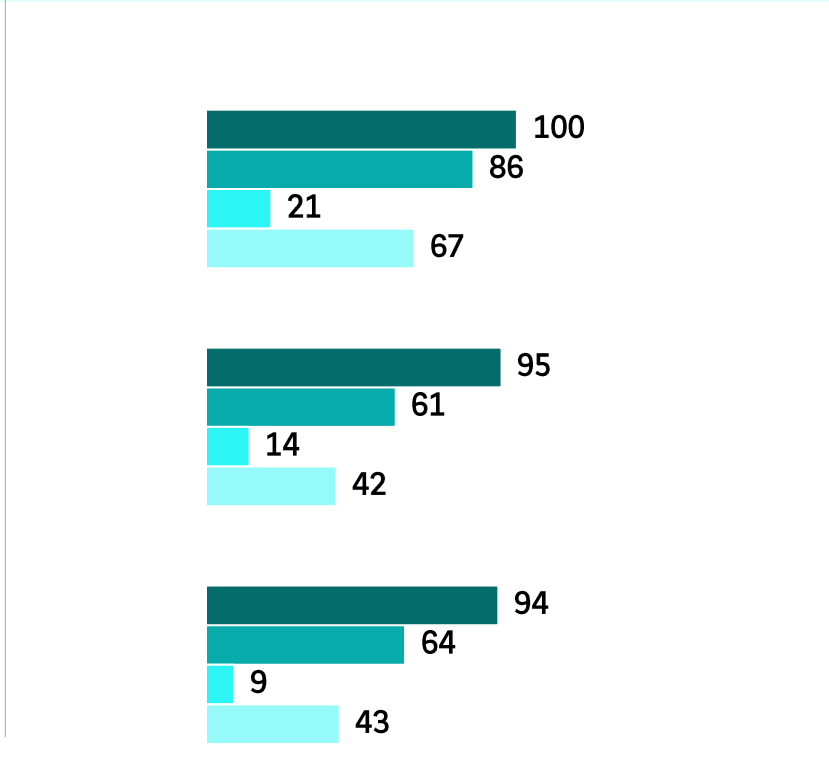
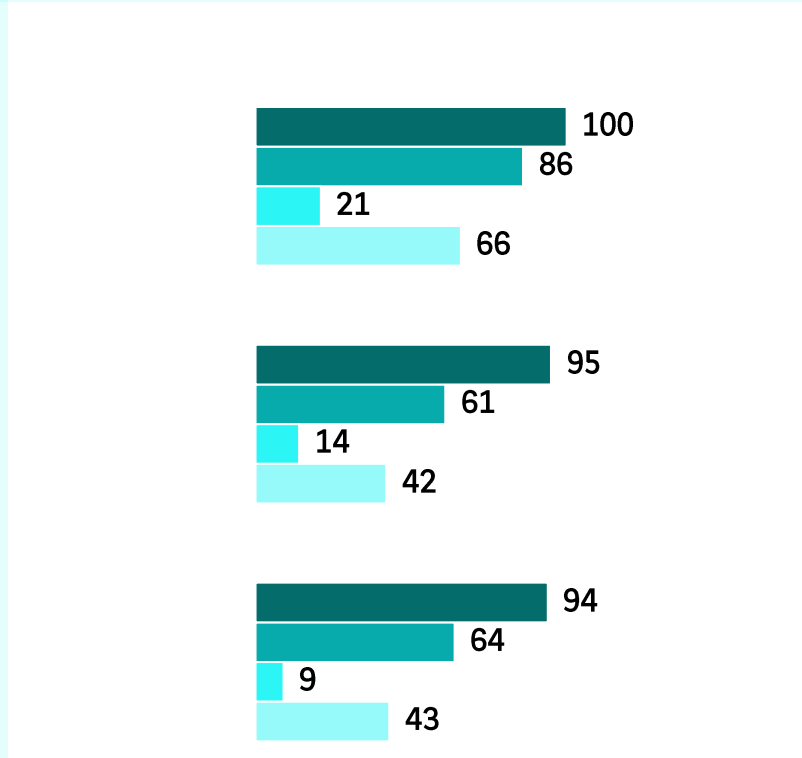
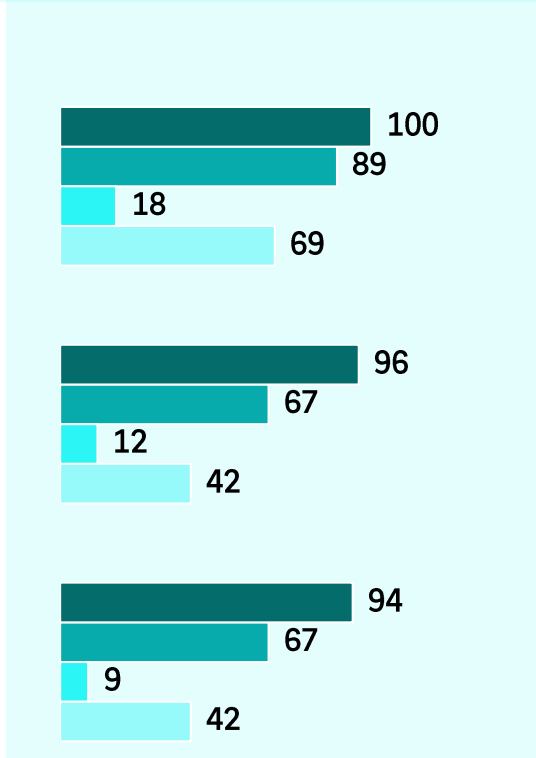
Europe

Total countries

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

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

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



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

HOW TO READ THE RESULTS ?

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

New question

IN % PC + LCVS

Small companies

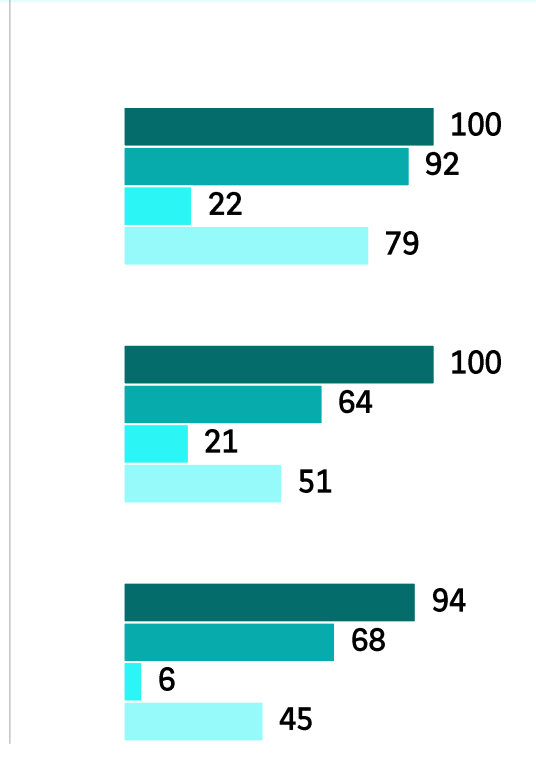
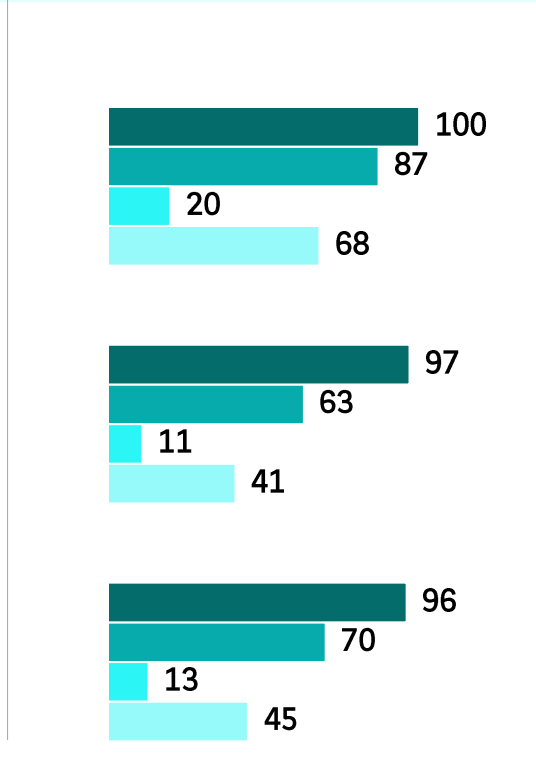
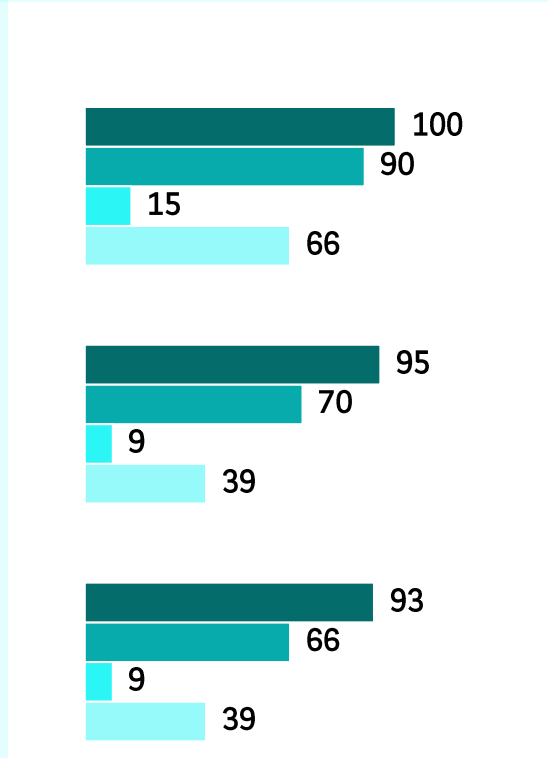
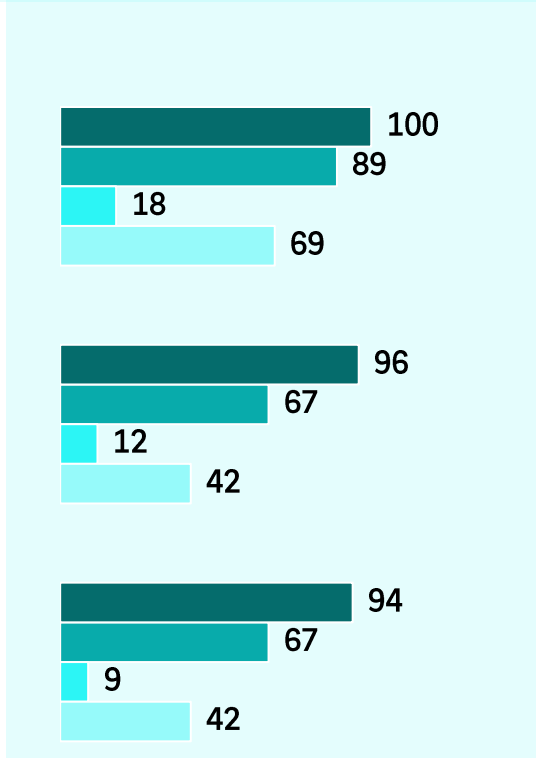
Medium companies

Large companies

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

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

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



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

HOW TO READ THE RESULTS ?

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

New question



All vehicles

	W	AT	CH	DE	ES	FR	GR	IT	PT	UK	BE	LU	NL	CZ	PL	SK	RO	DK	FI	NO	SE	MA	TR	BR	CL	PE	US	CA	MX	AU	NZ	IN	ID	TH	
At least one policy	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
At the company's premises	86	84	84	85	83	87	85	83	85	89	87	87	86	88	90	87	84	88	88	84	85	86	83	84	85	82	89	86	85	86	87	88	86	84	
At home	21	23	20	21	18	19	25	26	23	18	19	22	25	20	19	22	24	23	19	21	18	19	21	22	17	17	23	26	19	22	18	21	21	19	
Public charging	67	67	66	73	70	64	66	66	65	69	70	66	66	62	67	67	71	63	63	68	60	64	66	66	61	69	69	63	72	67	66	69	65	69	

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	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

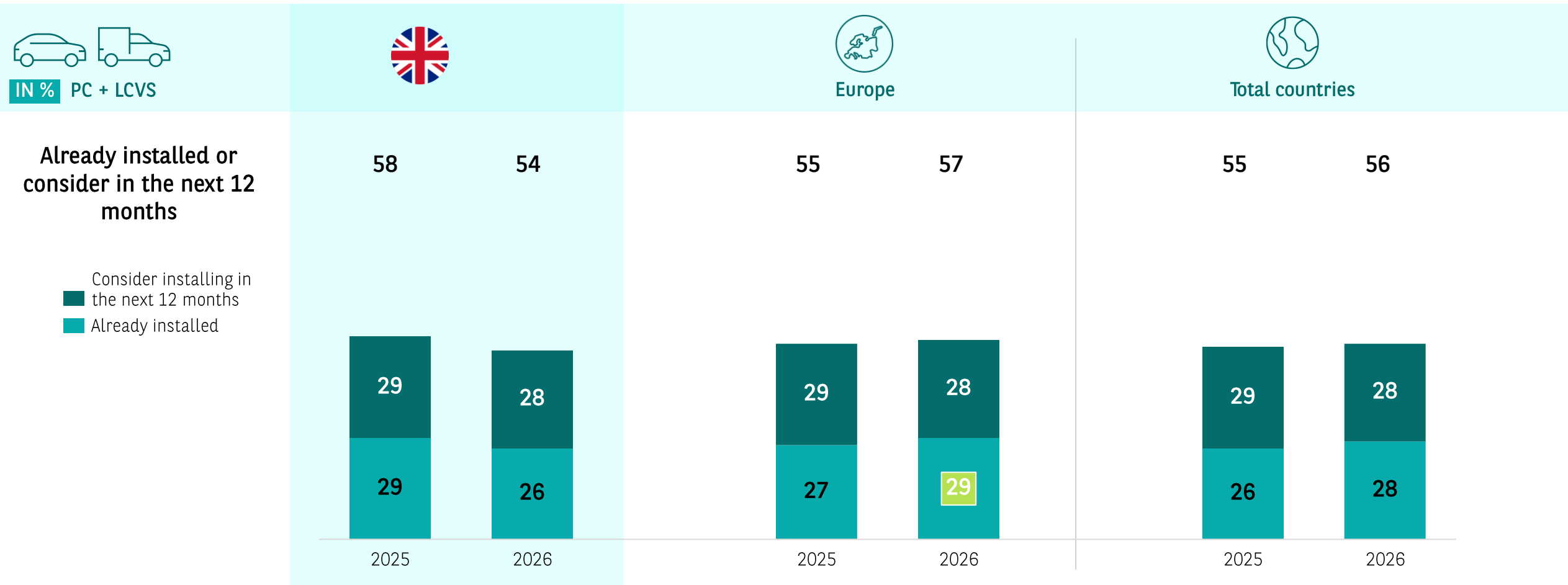
E31. What charging policy does your company currently use, or what policy will it use in the future?
Basis: companies with corporate vehicles = 100%



INSTALLATION OF CHARGING POINTS AT COMPANY'S PREMISES

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 54% 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.



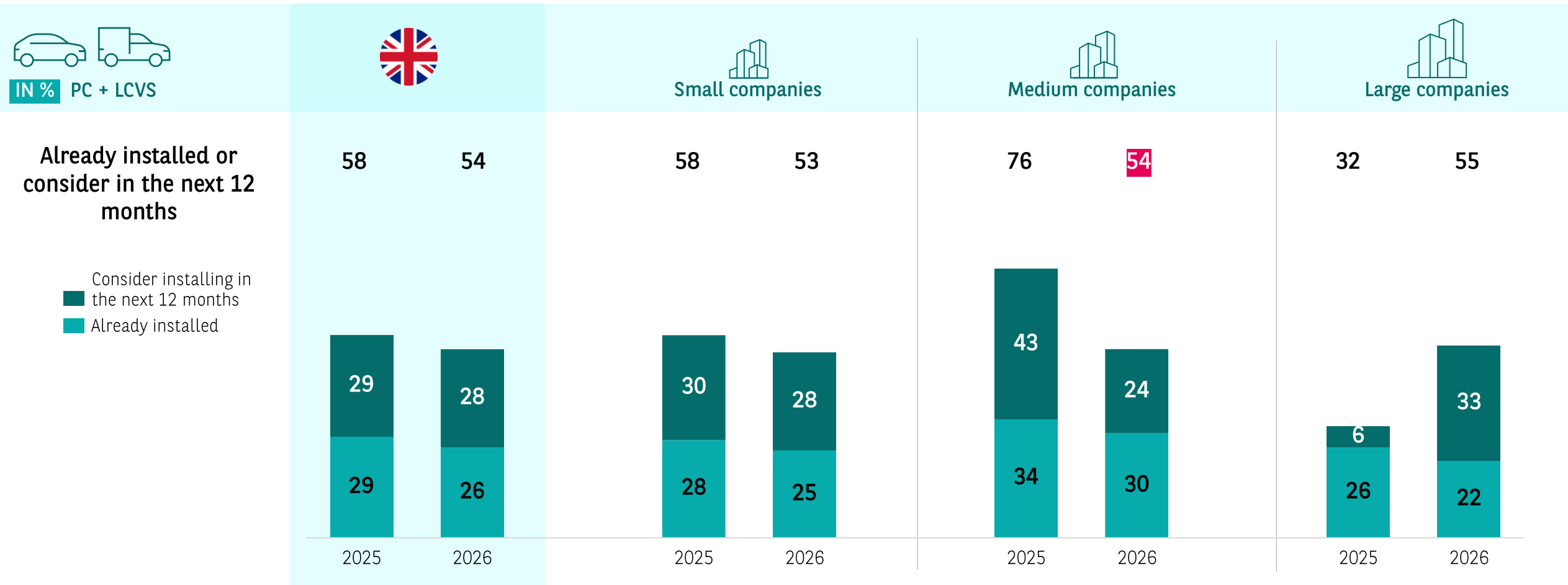
E32. Regarding charging at the company's premises, have you already installed charging points, or are you considering doing so in the next 12 months?
Basis: companies that are using or considering charging at the company's premises for passenger car or LCVs

X% Significantly higher / lower vs. previous wave

INSTALLATION OF CHARGING POINTS AT COMPANY'S PREMISES

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 54% 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 United Kingdom in 2026, 54% 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.

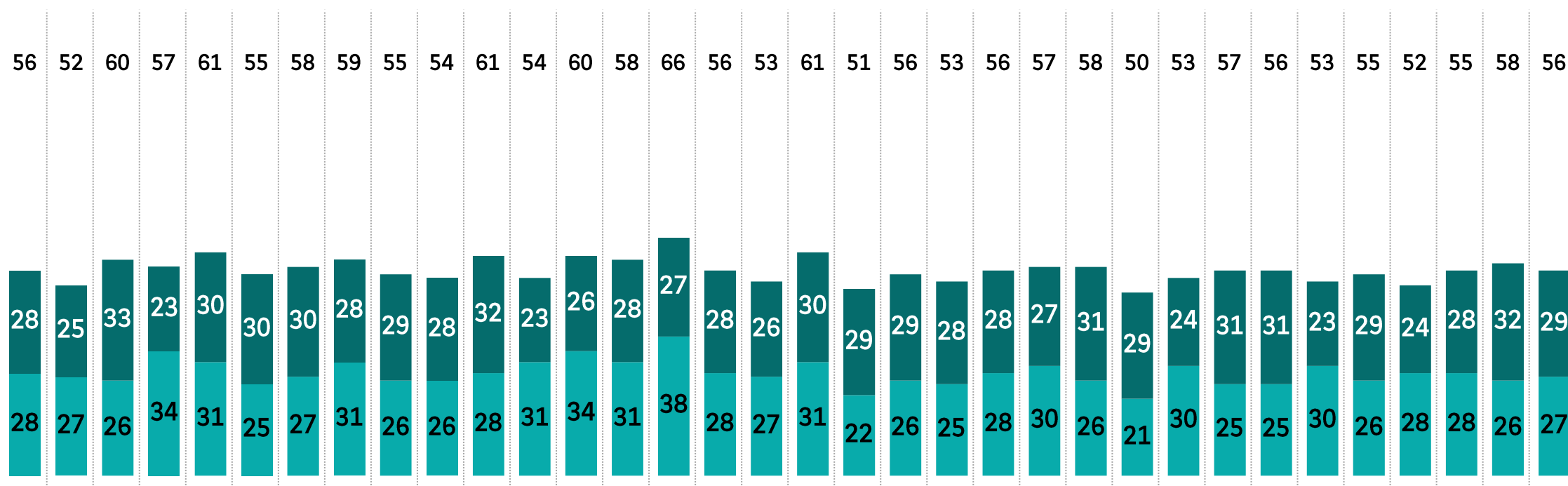


IN % PC + LCVS

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

Already using or consider in the next 12 months

Consider using
Already using



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

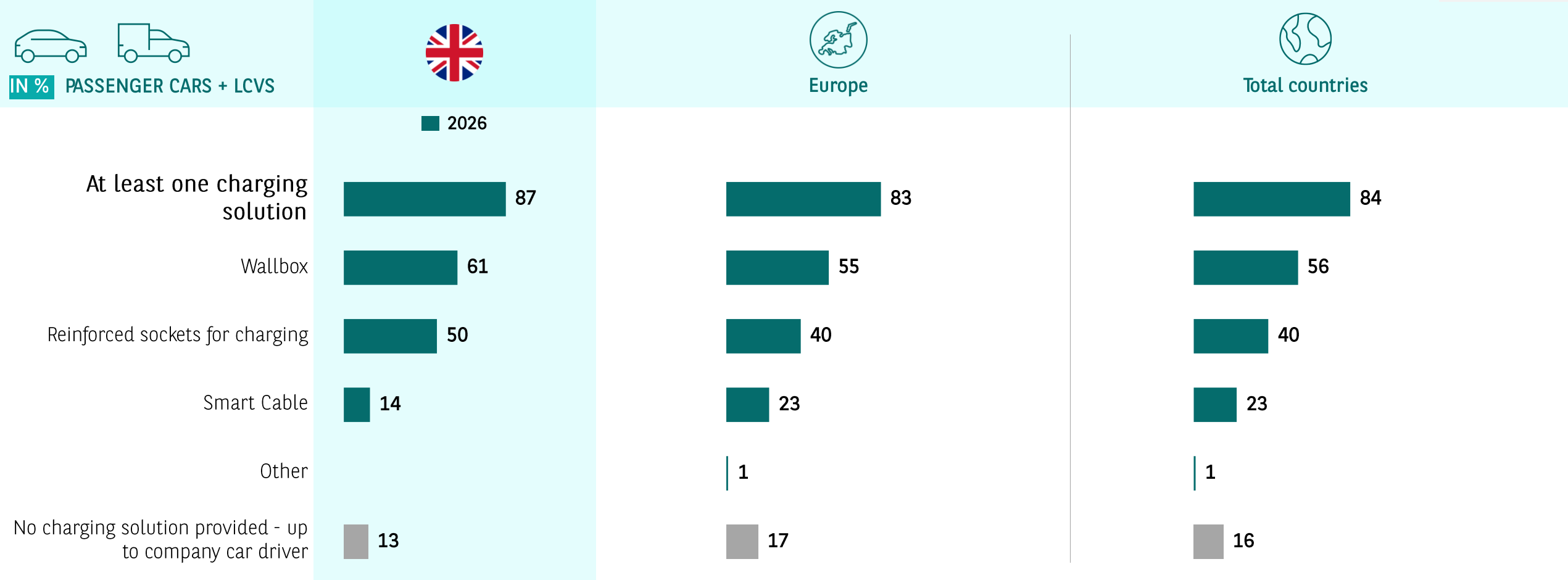


TYPE OF HOME CHARGING POINTS

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 87% 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



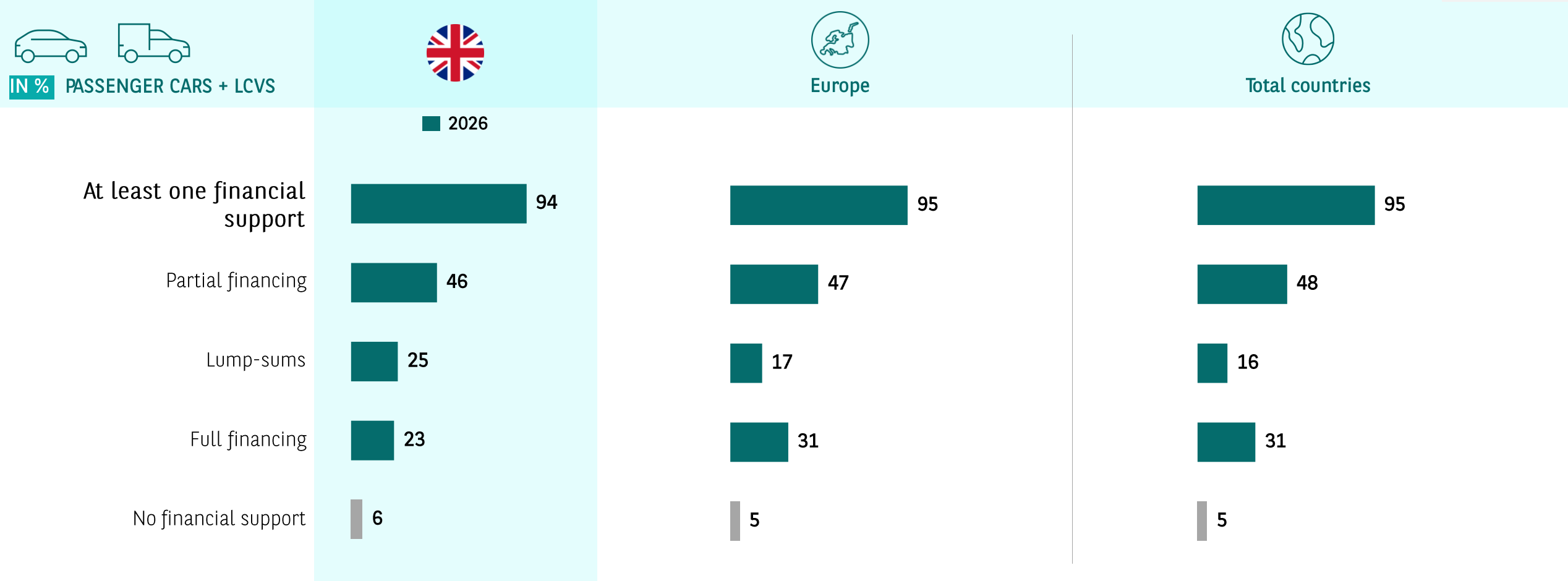
E34.NEW. Regarding home charging, what kind of home charging solutions does your company offer or plan to offer for the company car drivers?
Basis: companies that are using or considering home charging for passenger car or LCVs

TYPE OF FINANCIAL SUPPORT FOR HOME CHARGING POINTS

HOW TO READ THE RESULTS ?

In United Kingdom 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



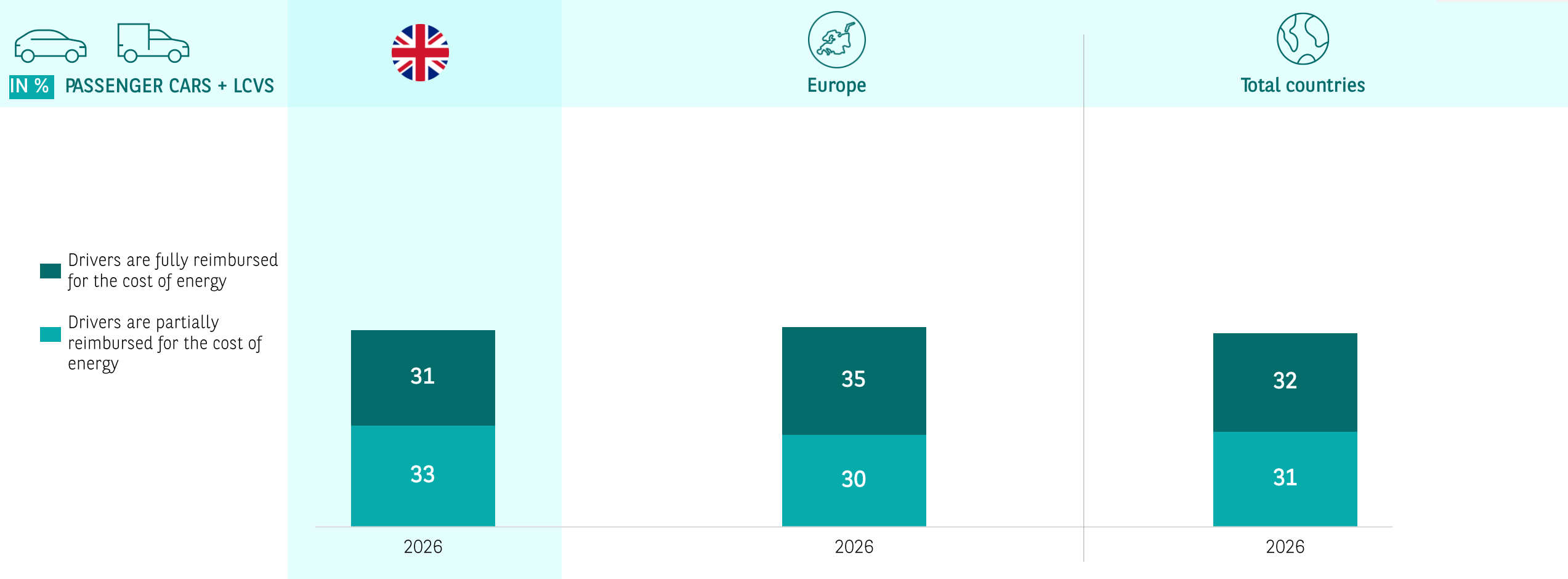
E35.NEW. How does your company financially support the provision of home charging solutions to company car drivers, or plans to do so in the next 12 months?
Basis: companies that offer or plan to offer at least one charging solution to company drivers

COST MANAGEMENT OF HOME CHARGING POINTS

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 31% of the companies that are already financially supporting or are considering financially supporting home charging points, fully reimburse drivers for the cost of energy, or plan doing so.

New question



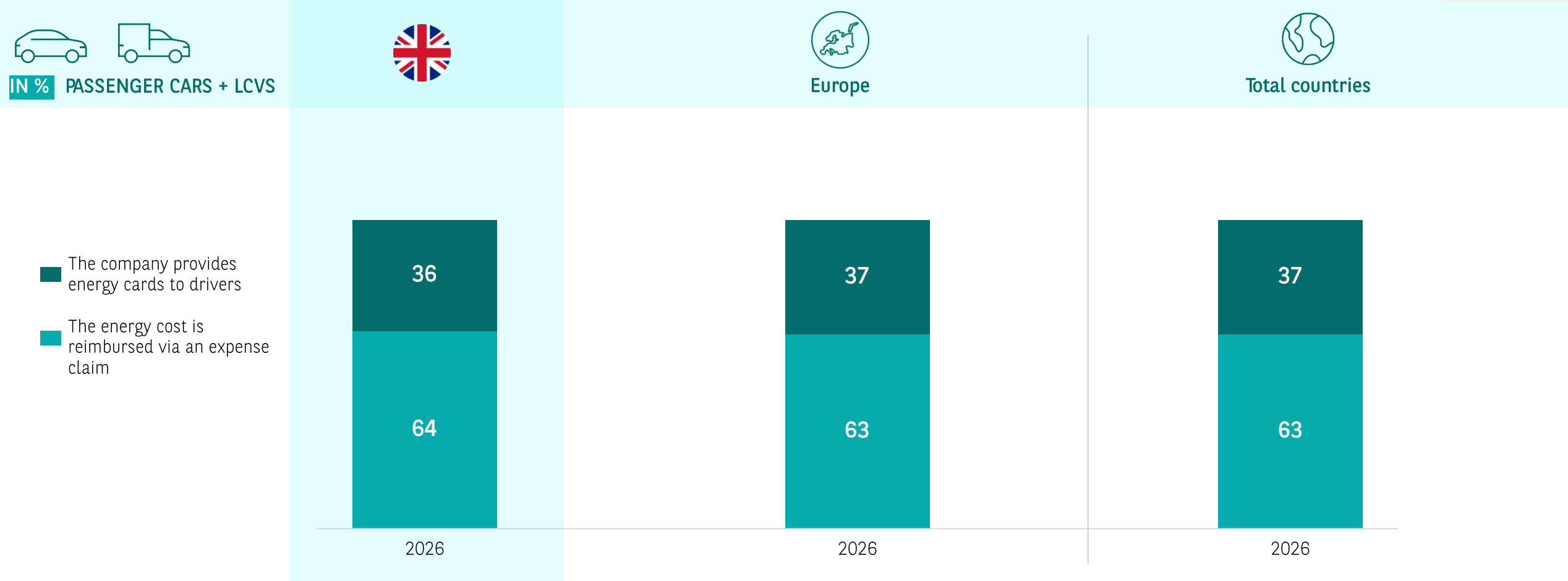
E36. How do you manage or plan to manage the energy costs of home charging for company car drivers? ?
Basis: companies that are already financially supporting or are considering financially supporting home charging points

PUBLIC CHARGING COST

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 36% 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

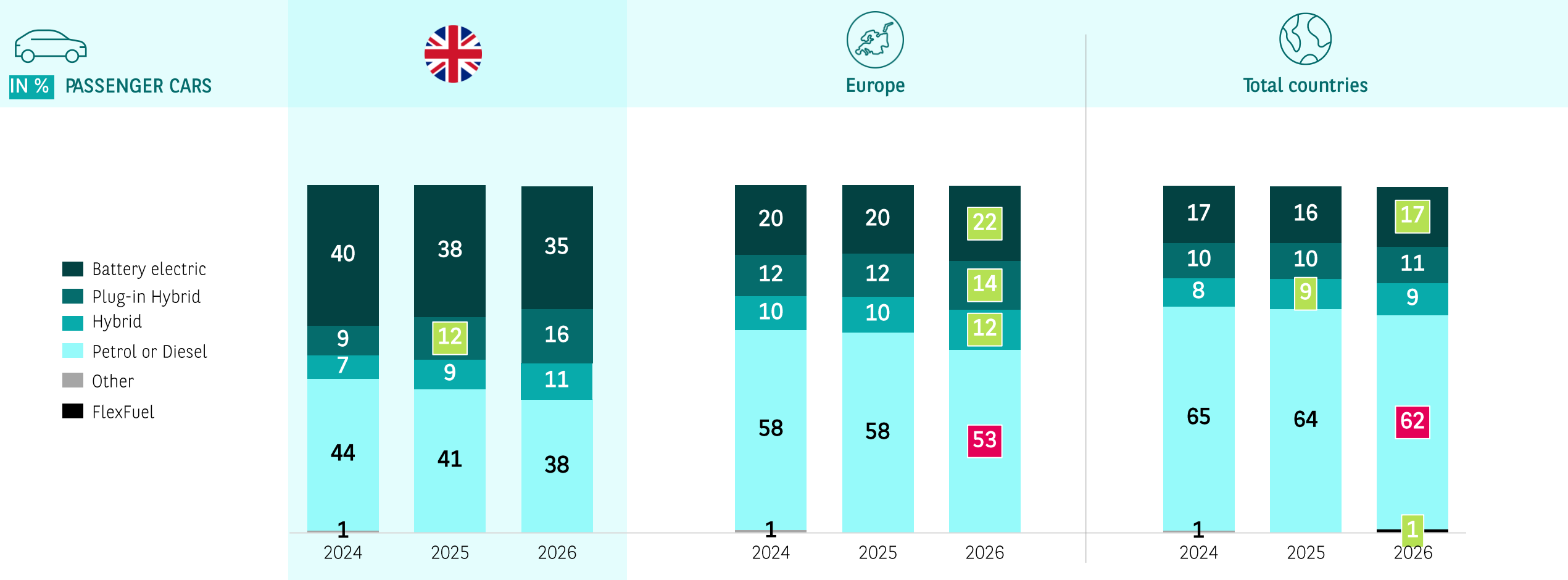
EXPECTED FLEET SHARE PER ENERGY

FOCUS ON PASSENGER CARS

HOW TO READ THE RESULTS ?

In United Kingdom in 3 years, 35% of the passenger car fleet is expected to be BEV.

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



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

X% Significantly higher/lower vs. previous wave

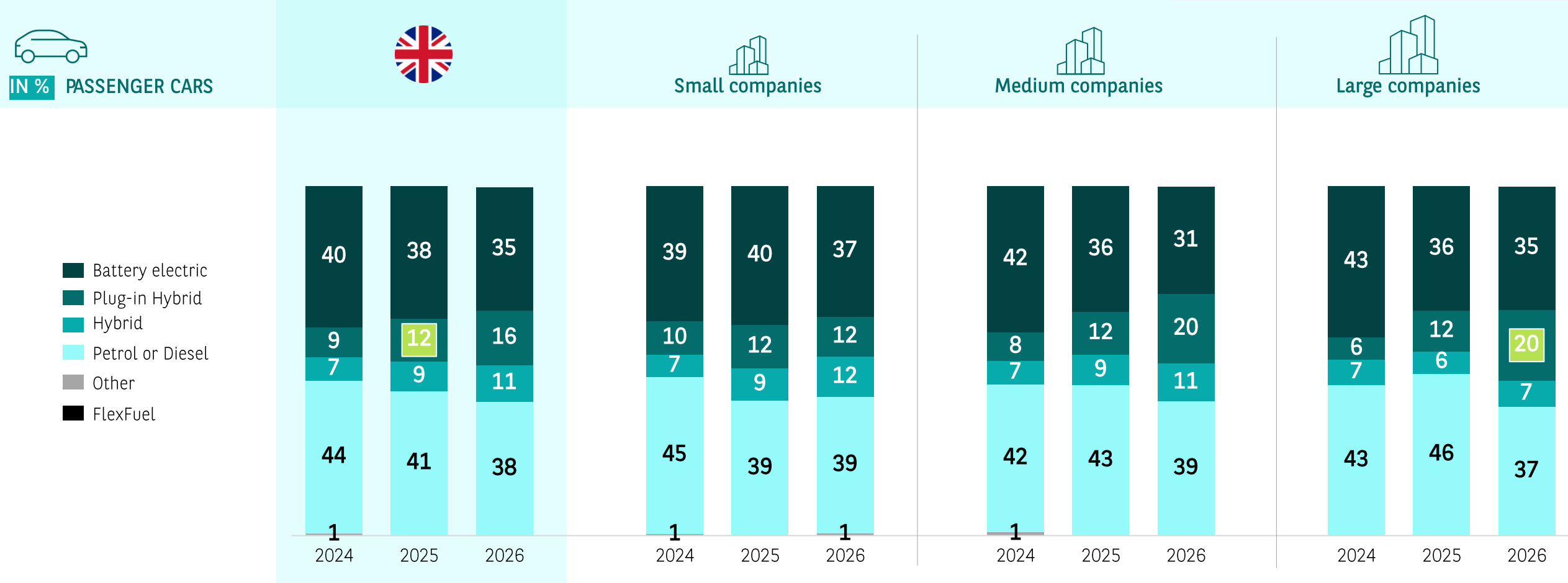
EXPECTED FLEET SHARE PER ENERGY

FOCUS ON PASSENGER CARS

HOW TO READ THE RESULTS ?

In United Kingdom in 3 years, 35% of the passenger car fleet is expected to be BEV.

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



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

X% Significantly higher / lower vs. previous wave

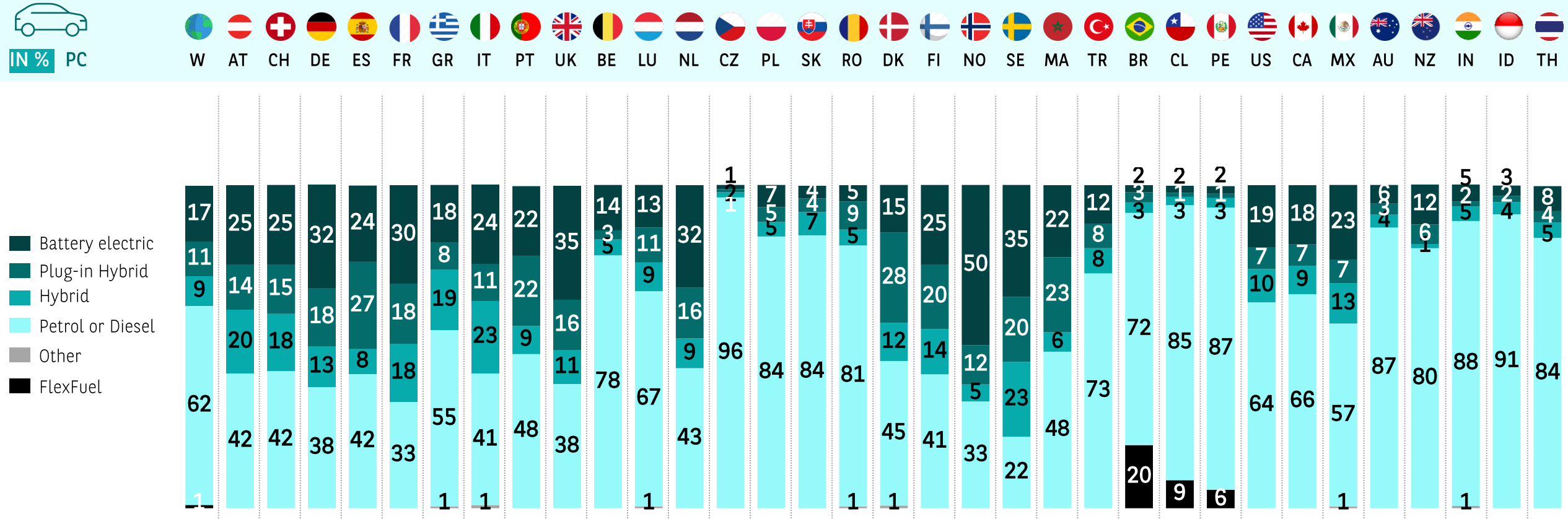
EXPECTED FLEET SHARE PER ENERGY

FOCUS ON PASSENGER CARS

HOW TO READ THE RESULTS ?

In United Kingdom in 3 years, 35% of the passenger car fleet is expected to be BEV.

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



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



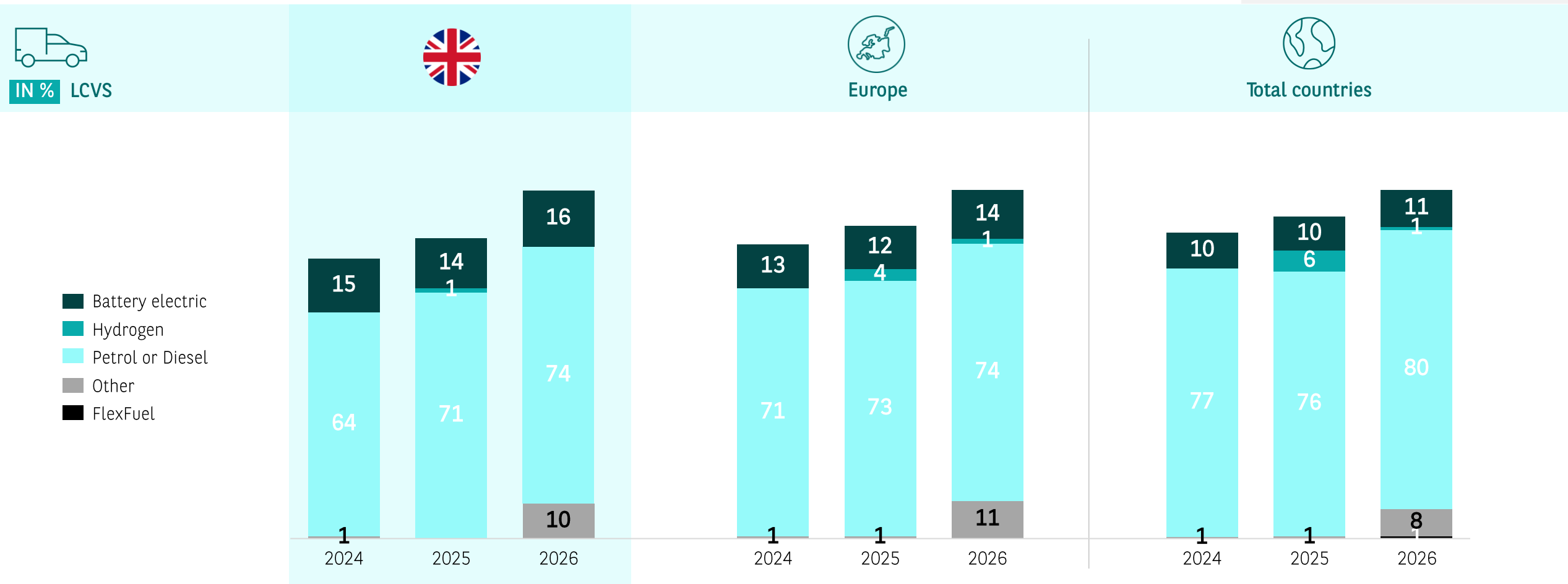
EXPECTED FLEET SHARE PER ENERGY

FOCUS ON LCVs

HOW TO READ THE RESULTS ?

In United Kingdom in 3 years, 16% of the LCV fleet is expected to be BEV.

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



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

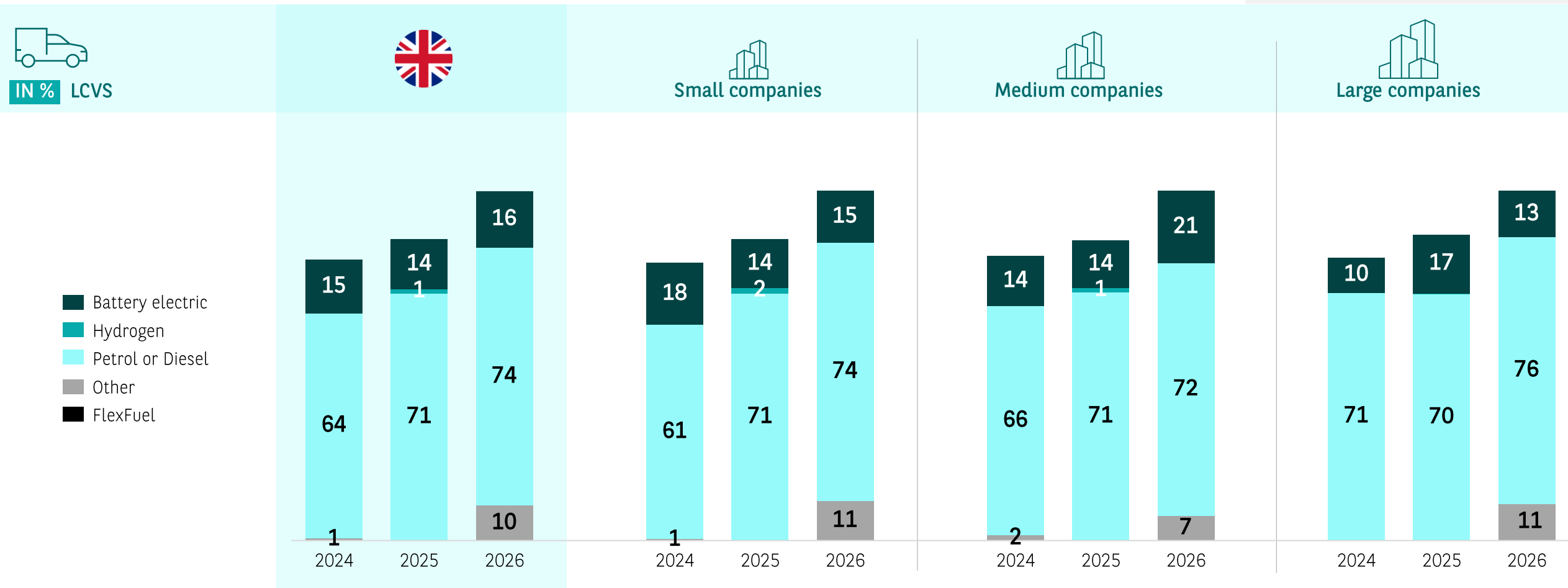
EXPECTED FLEET SHARE PER ENERGY

FOCUS ON LCVS

HOW TO READ THE RESULTS ?

In United Kingdom in 3 years, 16% of the LCV fleet is expected to be BEV.

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



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

EXPECTED FLEET SHARE PER ENERGY

FOCUS ON LCVs

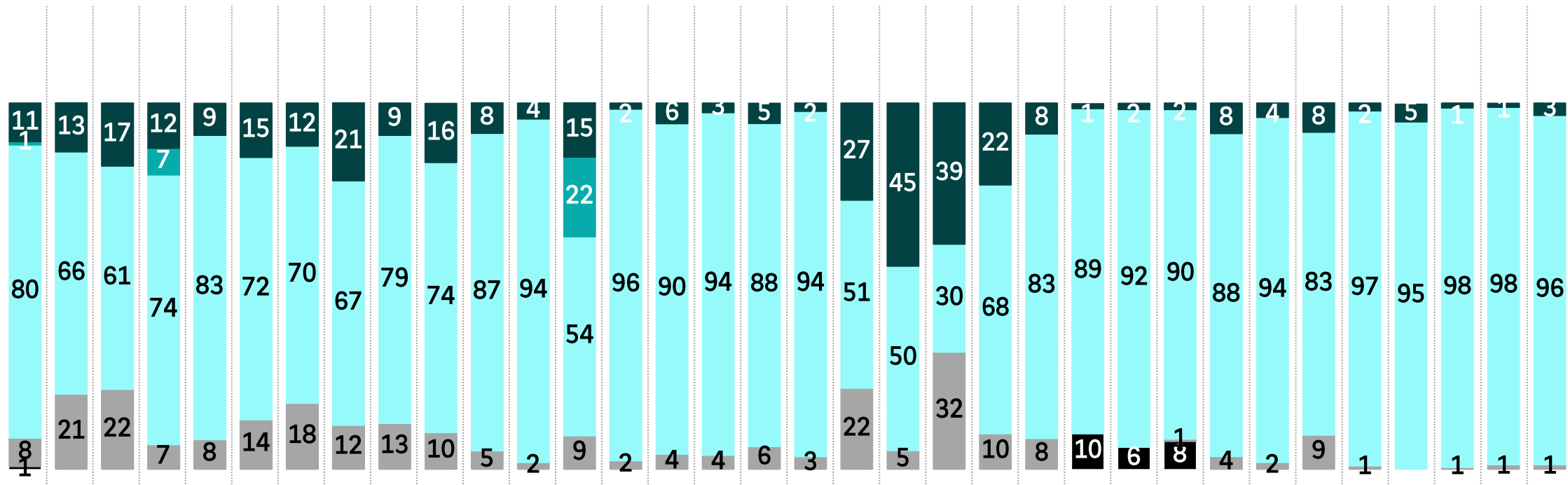
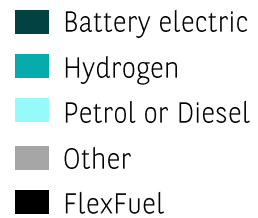
HOW TO READ THE RESULTS ?

In United Kingdom in 3 years, 16% of the LCV fleet is expected to be BEV.

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



IN % LCVs



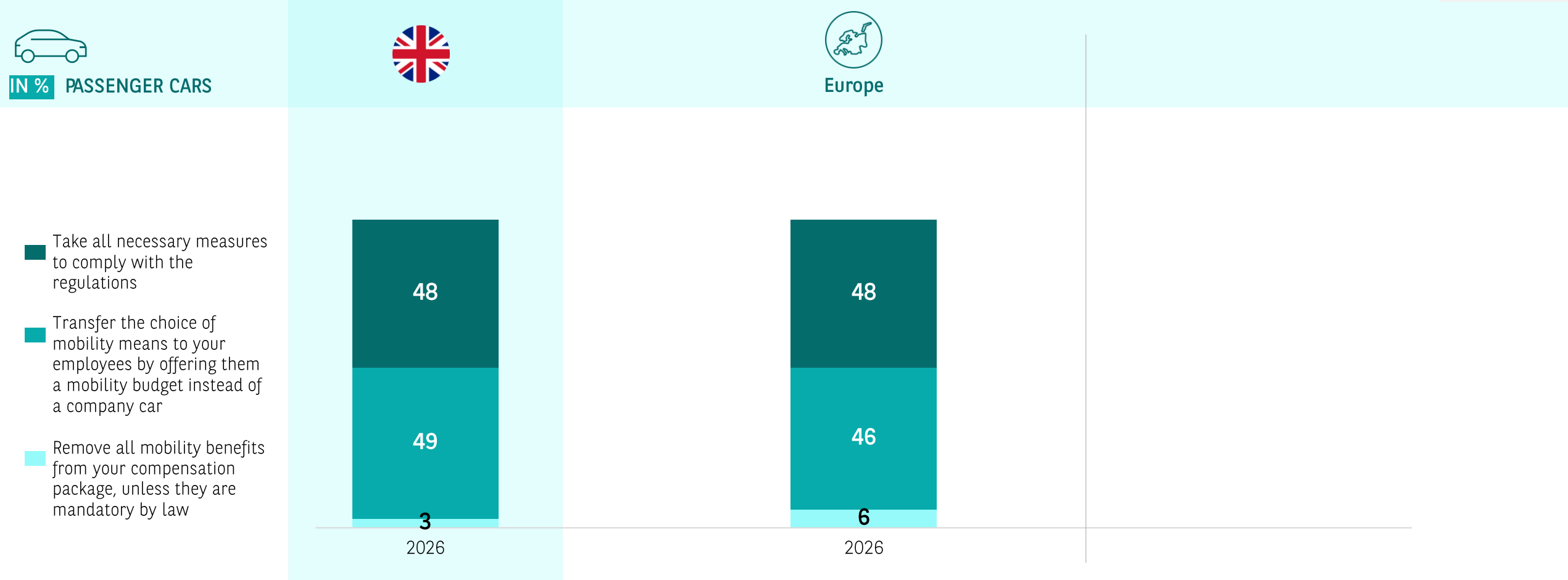
A53. What percentage of your LCV fleet do you expect to be: battery electric, petrol or diesel or Hydrogen fuel cell] vehicles in 3 years?
Basis: companies with LCVs



HOW TO READ THE RESULTS ?

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

New question

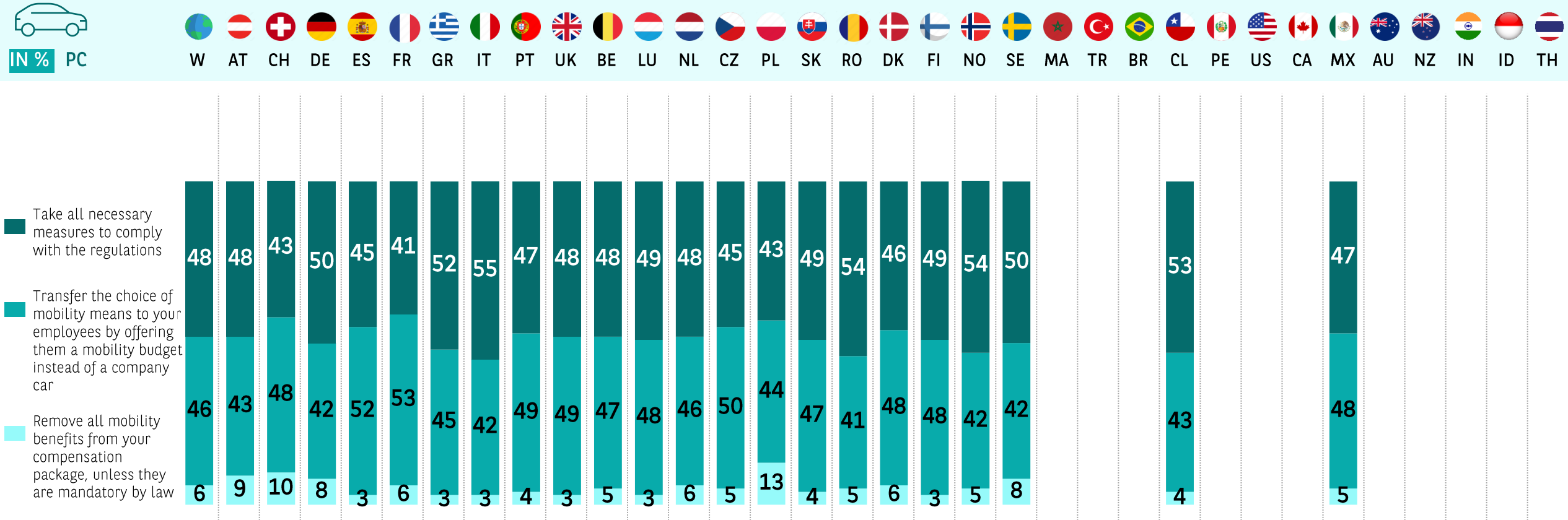


E38. What would you do if regulations required you to switch your fleet of passenger company cars exclusively to battery electric vehicles (BEVs) by 2030 at the latest?
Basis: companies with passenger cars

HOW TO READ THE RESULTS ?

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

New question



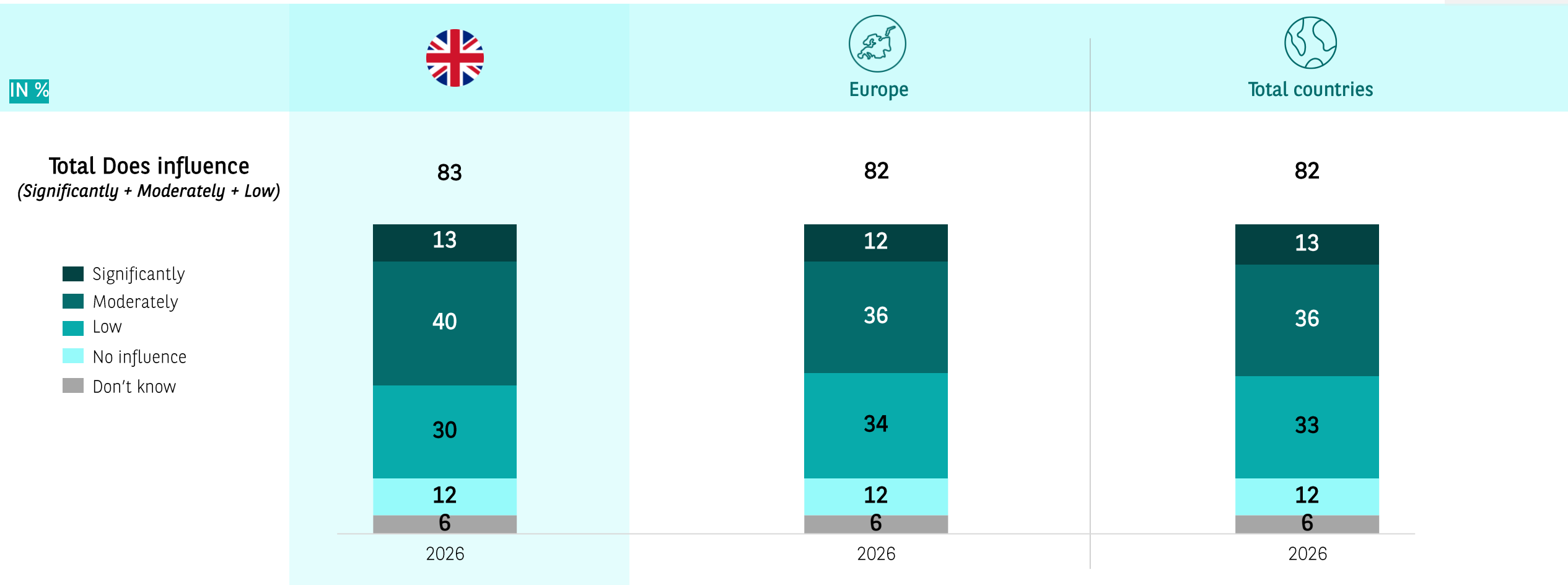
E38. What would you do if regulations required you to switch your fleet of passenger company cars exclusively to battery electric vehicles (BEVs) by 2030 at the latest?
Basis: companies with passenger cars

INFLUENCE OF LEASING PROVIDER ON ENERGY MIX CHOICES

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 83% of the companies financing their vehicles with Operational leasing or Financial leasing declare that their leasing provider influence their decision to move from a thermic vehicle to an electric vehicle.

New question



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

INFLUENCE OF LEASING PROVIDER ON ENERGY MIX CHOICES

HOW TO READ THE RESULTS ?

In 2026, 83% of the companies financing their vehicles with Operational leasing or Financial leasing declare that their leasing provider influence their decision to move from a thermic vehicle to an electric vehicle.

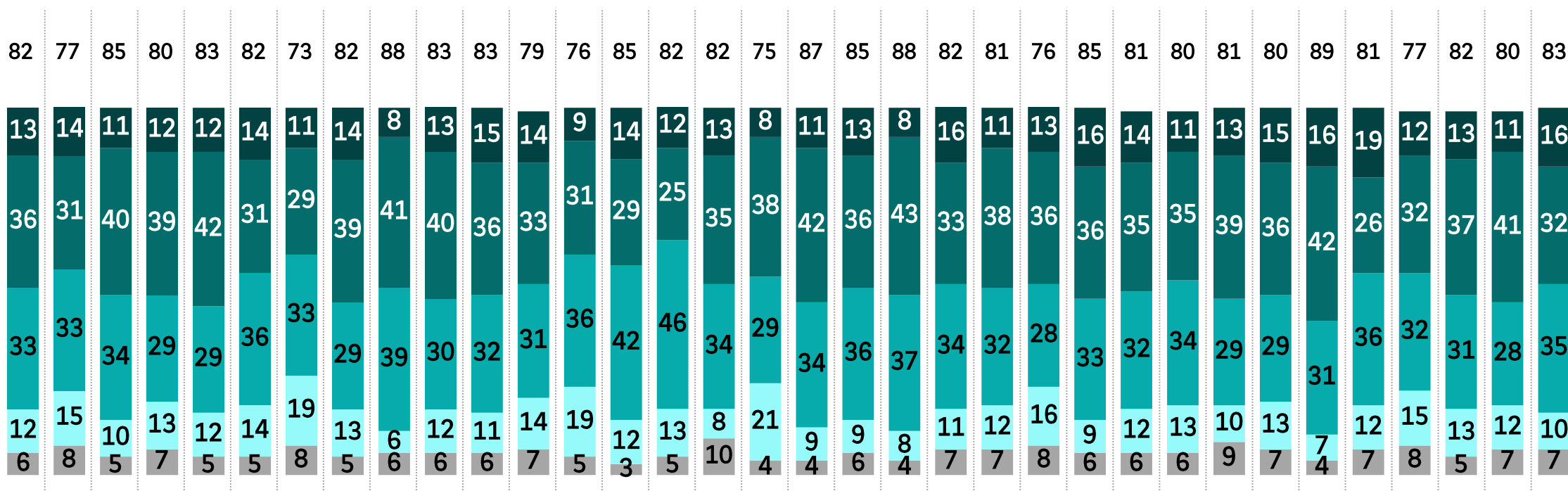
New question

IN %



Total Does influence
(Significantly + Moderately + Low)

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



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

HOW TO READ THE RESULTS ?

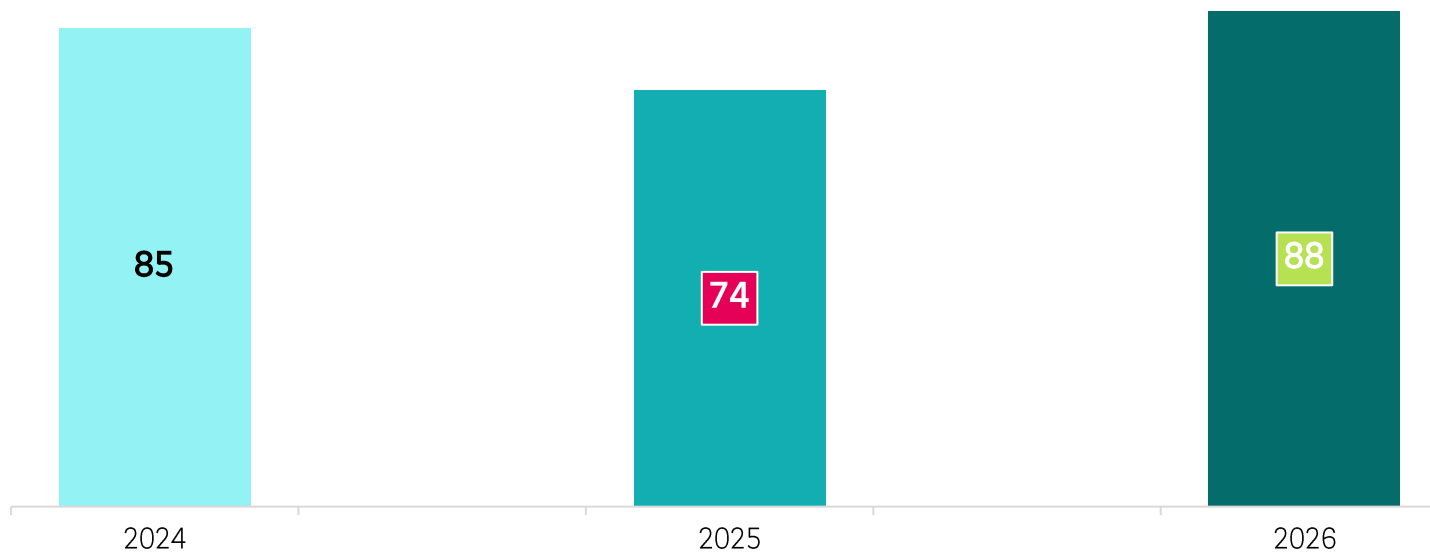
In 2026, 88% of the companies with LCVs declare it is important to receive expertise from suppliers to advise on the transition to electric LCV or other alternative energy types (e.g. Hydrogen Fuel cell).



IN % LCVS

Local question

Supplier's expertise for electric transition - Total Important



UK73. How important is it to receive expertise from your suppliers to advise on the transition to electric LCV or other alternative energy types (e.g. Hydrogen Fuel cell)?
Basis: companies with LCVs

X% Significantly higher / lower vs. previous wave



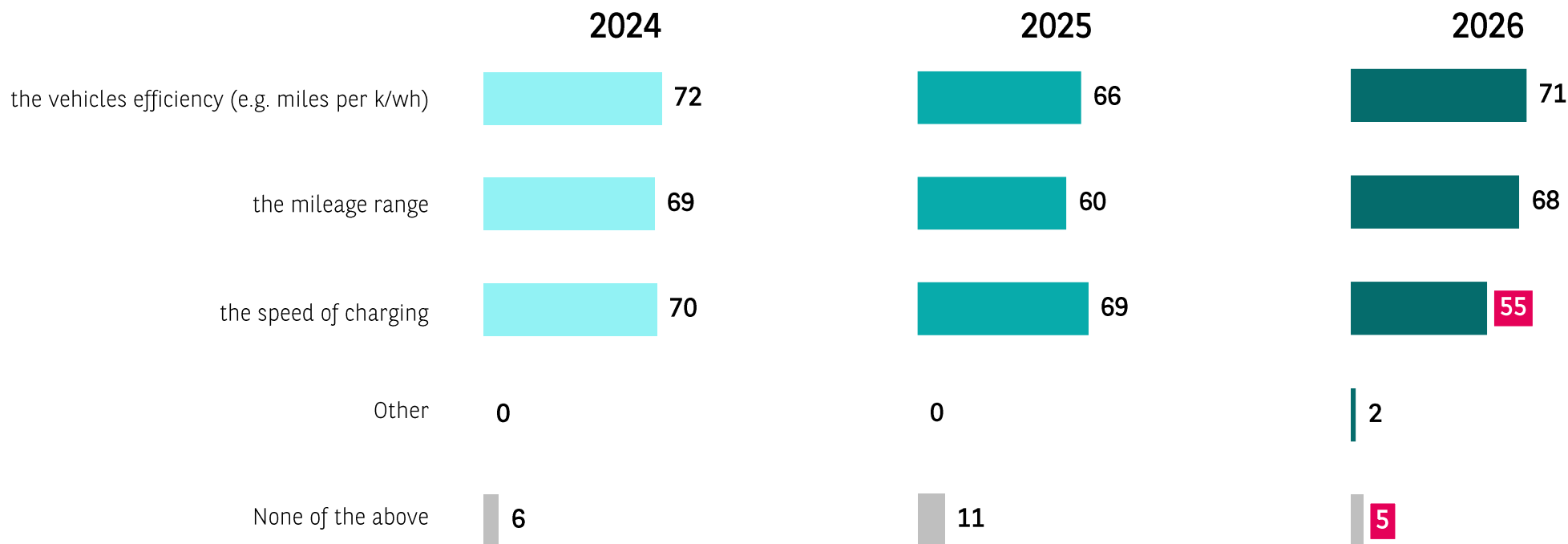
HOW TO READ THE RESULTS ?

In 2026, 71% of the companies that are already using or considering BEV for passenger cars or LCV consider the vehicles efficiency (e.g. miles per k/wh) when choosing battery electric vehicles for their fleet.



Local question

IN % PASSENGER CARS + LCVS



UK74. When choosing battery electric vehicles for your fleet, do you consider?
Basis: companies already using or considering BEV for passenger cars or LCV

X% Significantly higher/lower vs. previous wave

VANS AND DAILY MILEAGE CONSIDERED FOR TRANSITION TO BEV

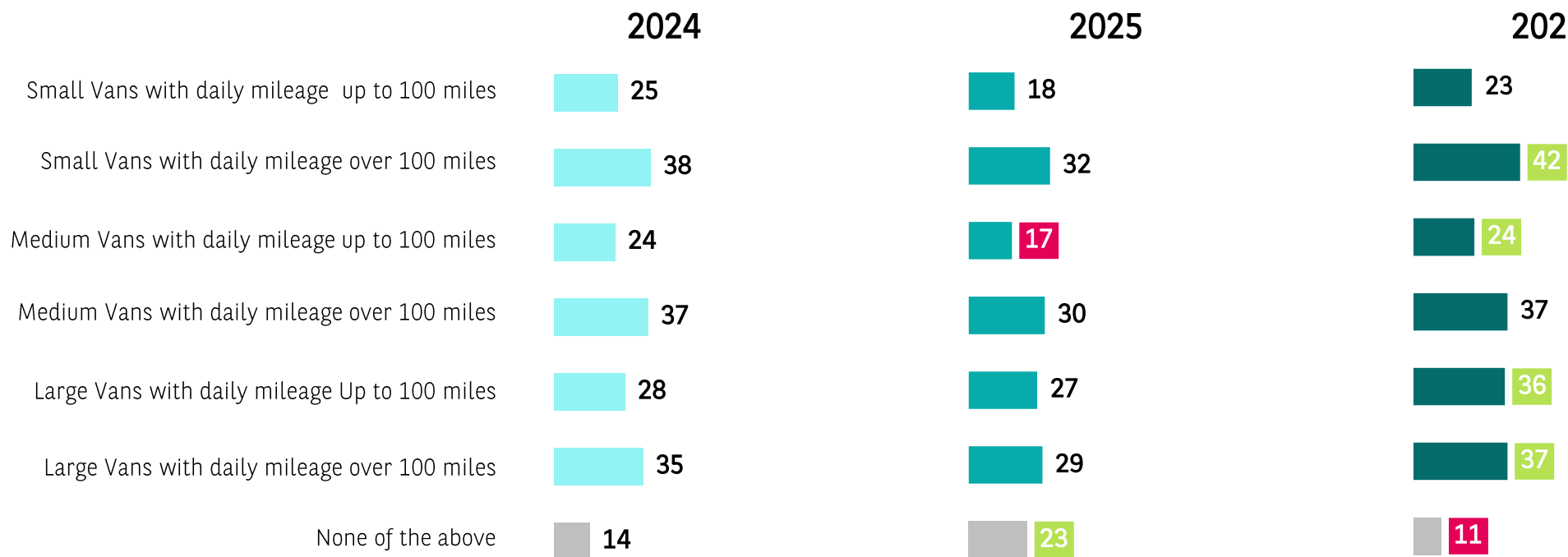
HOW TO READ THE RESULTS ?

In 2026, 23% of the companies with LCVs have or are considering having Small Vans with daily mileage up to 100 miles to transition from diesel to battery electric.



IN % LCVS

Local question



UK75. Which vans and daily mileage profiles have you or are you considering to transition from diesel to battery electric?
Basis: companies with LCVs

X% Significantly higher / lower vs. previous wave

04

CONNECTED FLEETS

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



Telematics adoption bounces back to its 2024 levels

52% of companies in the UK have connected vehicles for all or part of their fleet, the highest rate in Europe, and returning to levels seen in 2024. Medium companies are the most equipped (60%), large companies the least (40%), especially for passenger cars (25% vs 31% in the UK overall).

No acceleration in data usage, despite the potential being seen

In 2026, 18% of the companies in the UK have claimed using the data from telematics platforms, in line with the European average but stable, unlike other European markets. A significant 48% of companies are still considering leveraging this data, maintaining its potential.

The use of the data is more common for passenger car (22%) than for LCVs (13%).

Drivers' safety and vehicle's security are the main drivers for using telematics data.

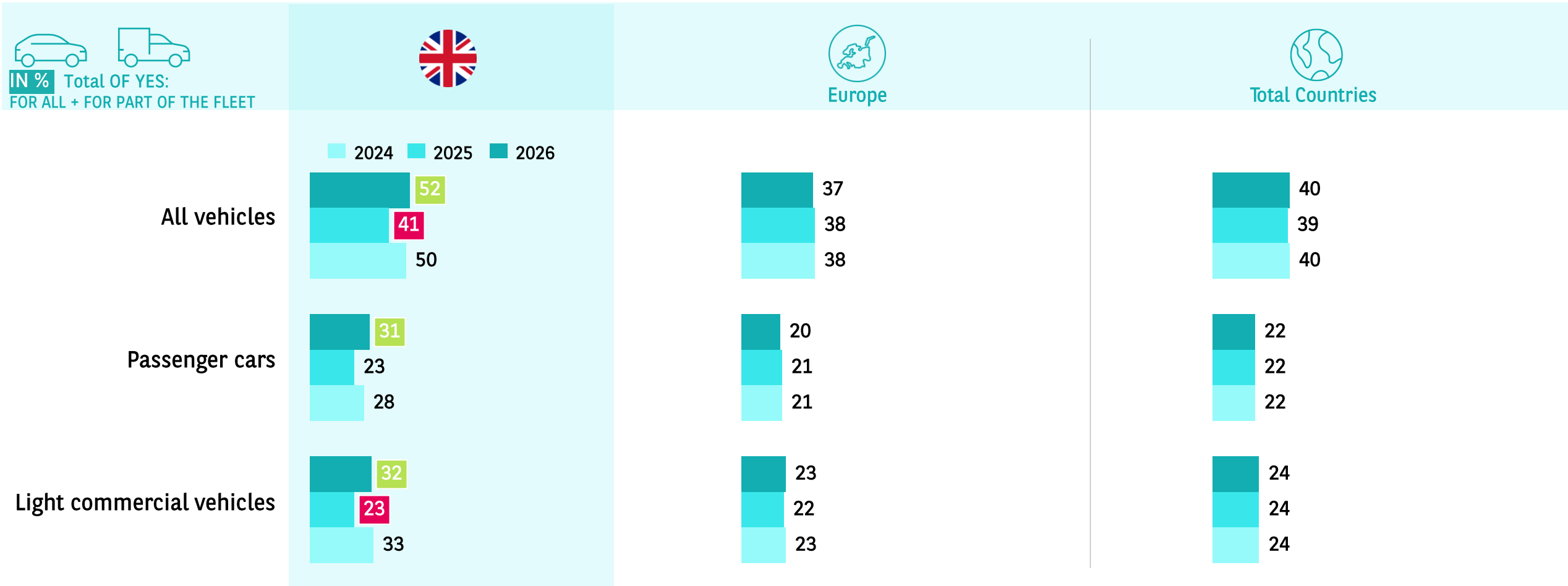
The main reasons for using telematics are to improve driver safety and to locate or enhance vehicle security. This is particularly important for LCVs, with 40% and 39% of companies citing these reasons, respectively, and for passenger cars, where 30% and 27% of companies do so, respectively.

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 52% of the companies have connected vehicles for all or part of their fleet.

31% have connected passenger cars and 32% have connected LCVs.



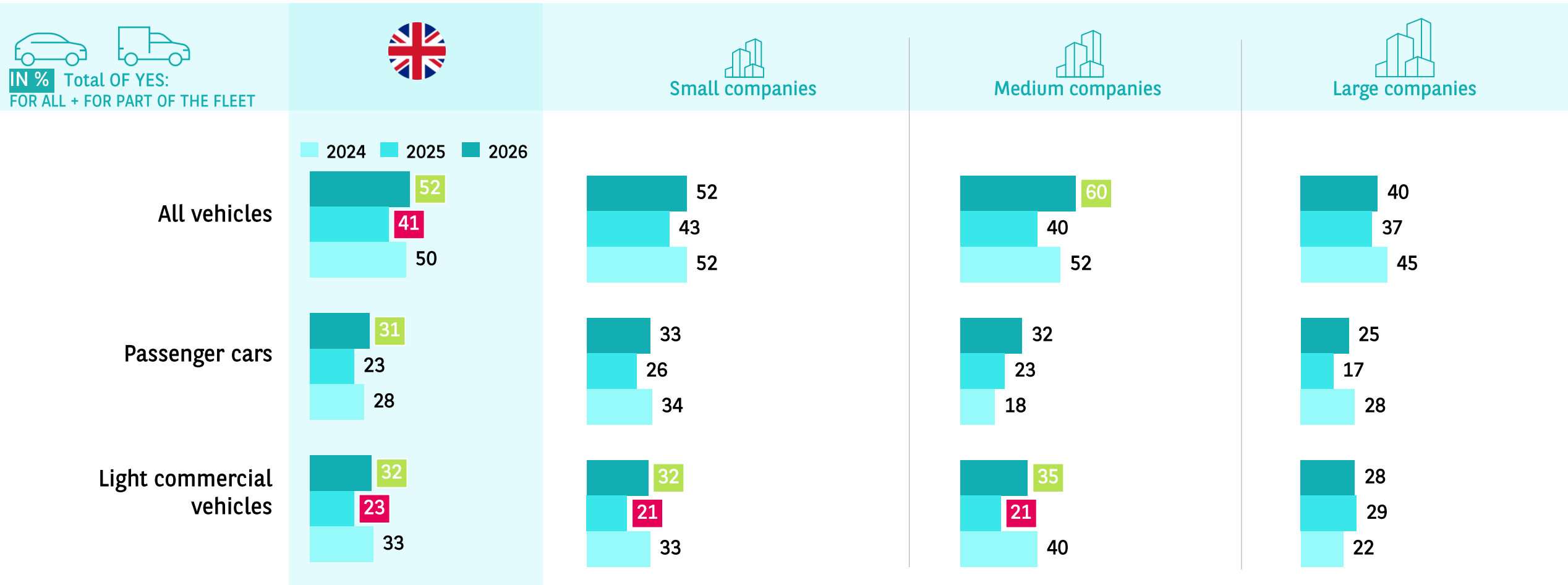
E23c. Is your fleet connected thanks to a telematic tool?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 52% of the companies have connected vehicles for all or part of their fleet. 31% have connected passenger cars and 32% have connected LCVs.



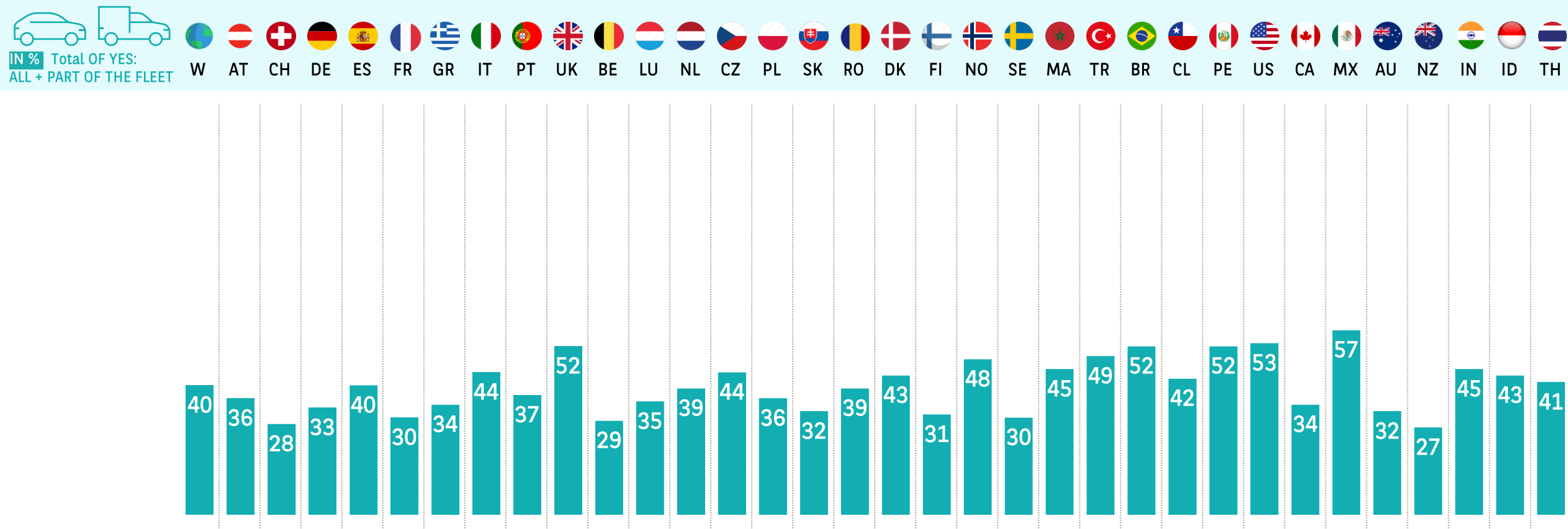
E23c. Is your fleet connected thanks to a telematic tool?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 52% of the companies have connected vehicles for all or part of their fleet.



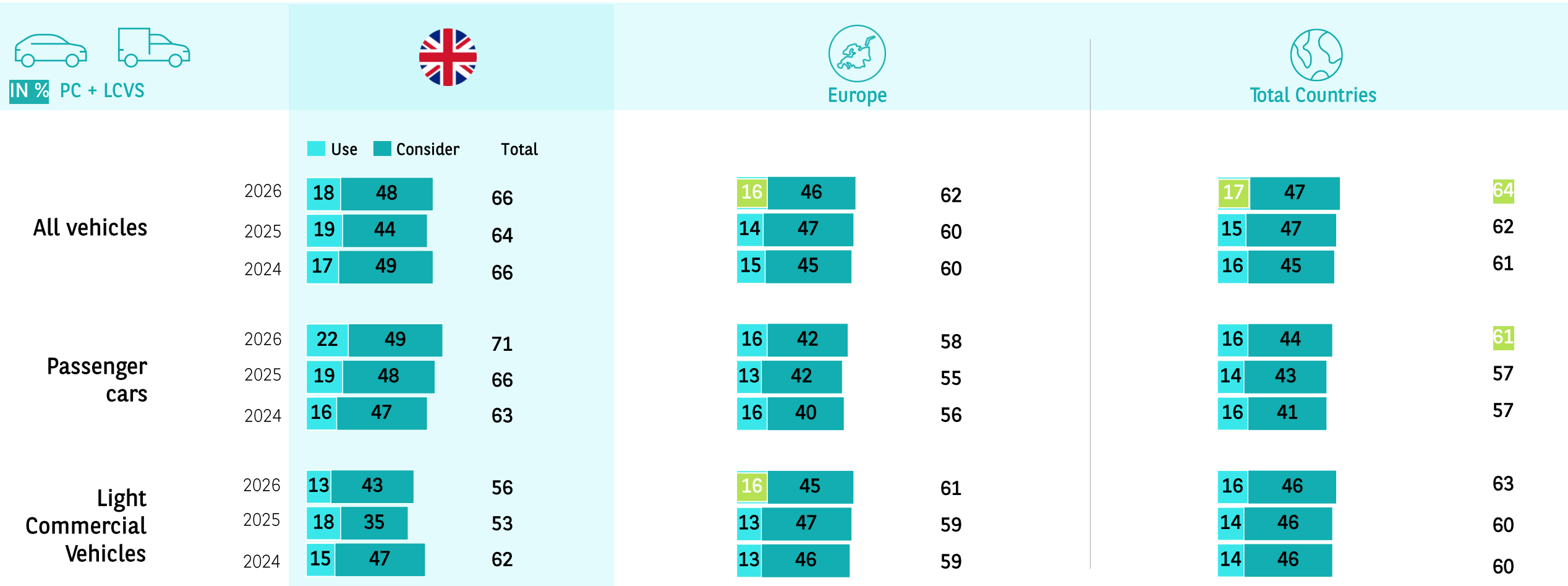
E23c. Is your fleet connected thanks to a telematic tool?
Basis: companies with corporate vehicles = 100%



PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 66% 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.



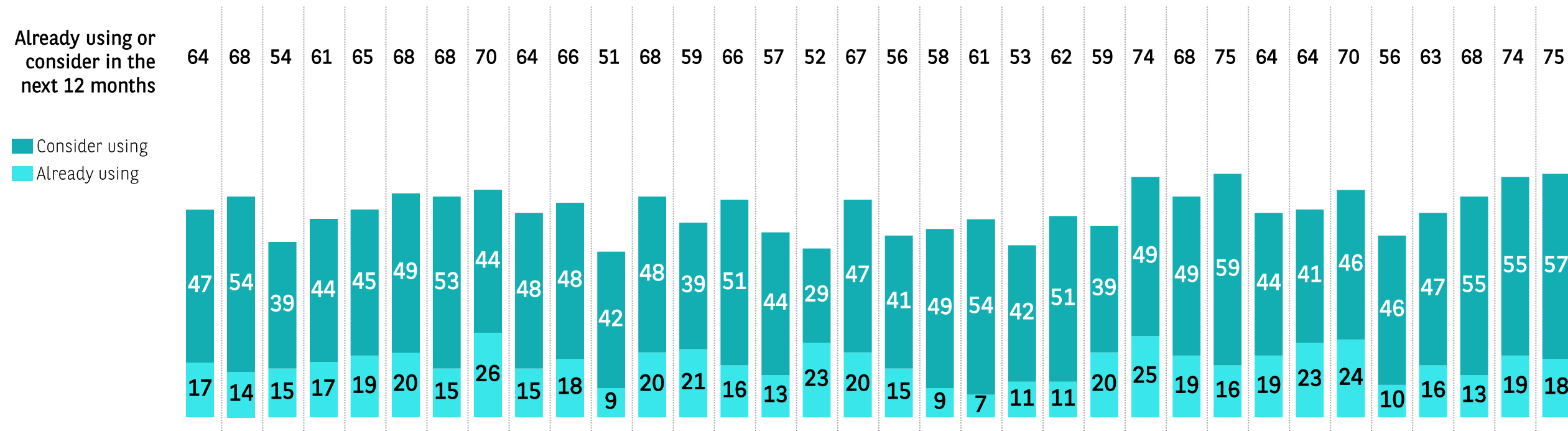
E23d. Do you use or consider using the data coming from the vehicle box thanks to a telematics platform ?
Basis: companies with connected vehicles thanks to a telematic tool

X% Significantly higher / lower vs. previous wave

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 66% 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.



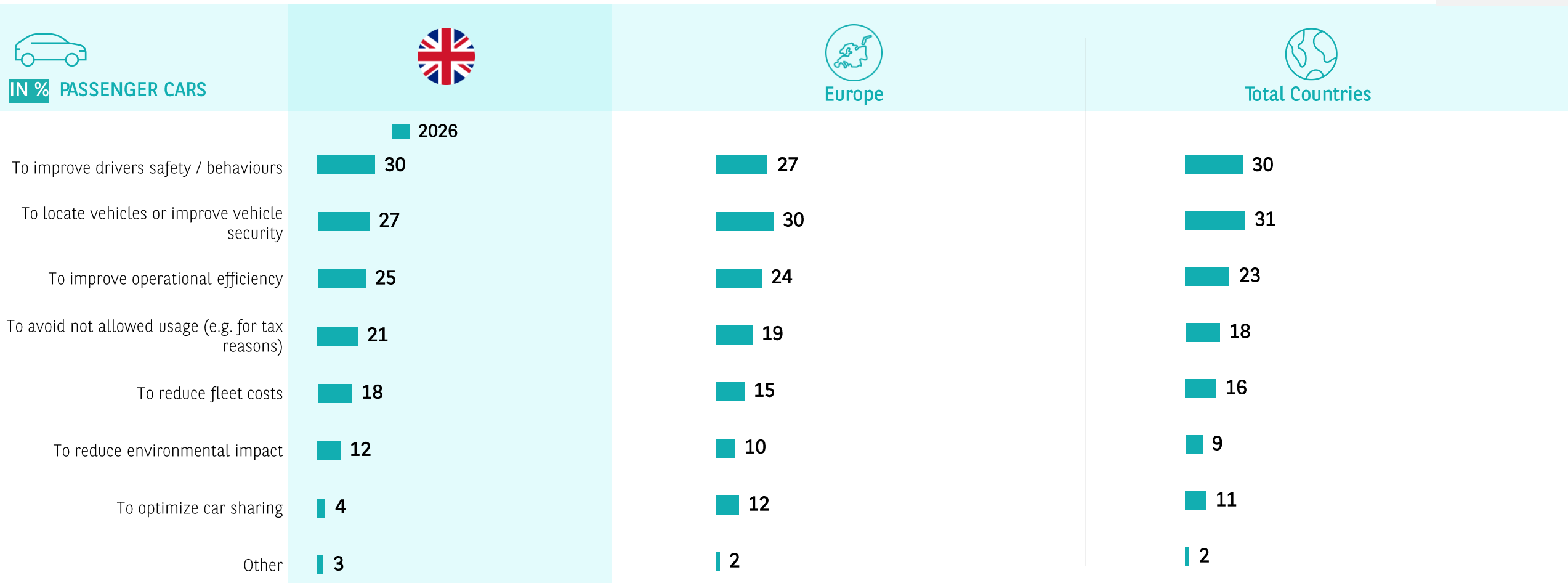
E23d. Do you use or consider using the data coming from the vehicle box thanks to a telematics platform ?
Basis: companies with connected vehicles thanks to a telematic tool

REASONS FOR USING TELEMATICS DATA FOR PASSENGER CARDS

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 30% of the companies that are already using data or considering doing so, declare that the main reason to use Telematics data for passenger cars is: To improve drivers safety / behaviours.

New question



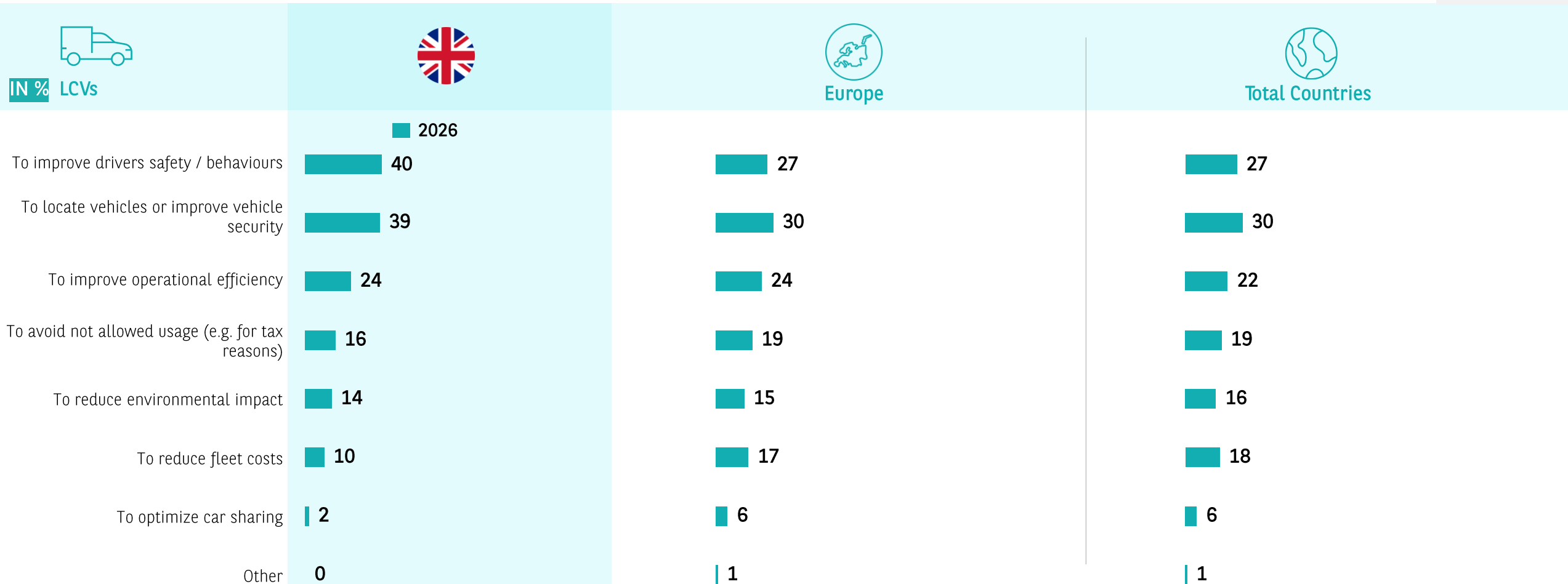
E25AB. What are or would be the two main reasons for you to use telematics data to manage your fleet?
Basis: companies already using data coming from Telematics or considering doing so for passenger cars

REASONS FOR USING TELEMATICS DATA FOR LCVs

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 40% of the companies that are already using data or considering doing so, declare that the main reason to use Telematics data for passenger cars is: To improve drivers safety / behaviours.

New question



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

05

EMPLOYEE MOBILITY

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



The implementation of corporate mobility policies and solutions is very strong in 2026

89% of companies in the UK have implemented at least one mobility policy or solutions or are planning to do so, which is above the European average and up from last year (76%) and 2024 (84%).

Ride sharing rises significantly, back to 2024 levels

Private lease or salary sacrifice are back leading mobility policy at 42% of implementation or consideration, up from last year (22%) and returning to levels seen in 2024 (45%). Public transport expense reimbursement are following at 36%, then car or cash allowance at 31%.

In terms of mobility solutions, ride sharing stands out (40%), up from 2025 and bouncing back close to levels seen in 2024 (45%). 36% of UK companies are also offering an app (30% a card) to book multiple mobility solutions or consider doing so in the next 3 years.

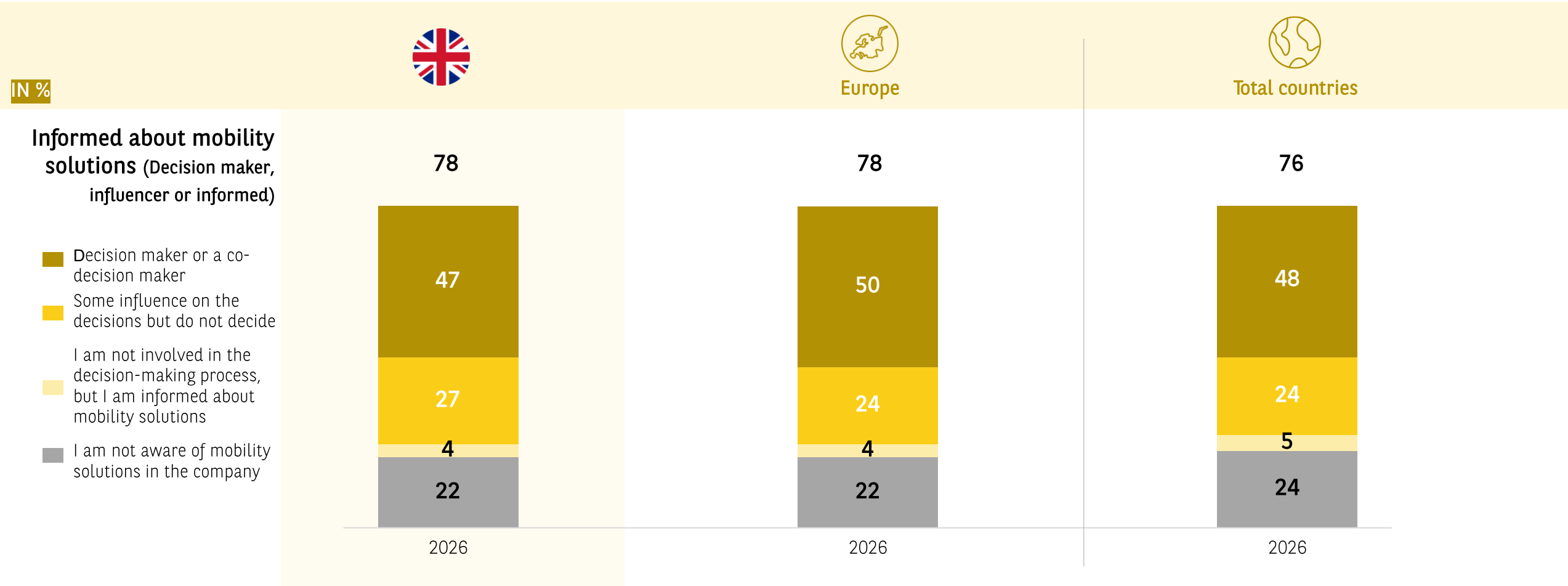
HR-related needs remain the main reason for developing corporate mobility

HR-related needs drive the introduction of mobility solutions and policies in 44% of UK companies. Additionally, 37% of companies are developing corporate mobility to capitalize on tax benefits and anticipate upcoming regulations.

RESPONDENTS' INVOLVEMENT IN MOBILITY SOLUTION DECISIONS

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 78% of the respondents are informed about mobility solutions.



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

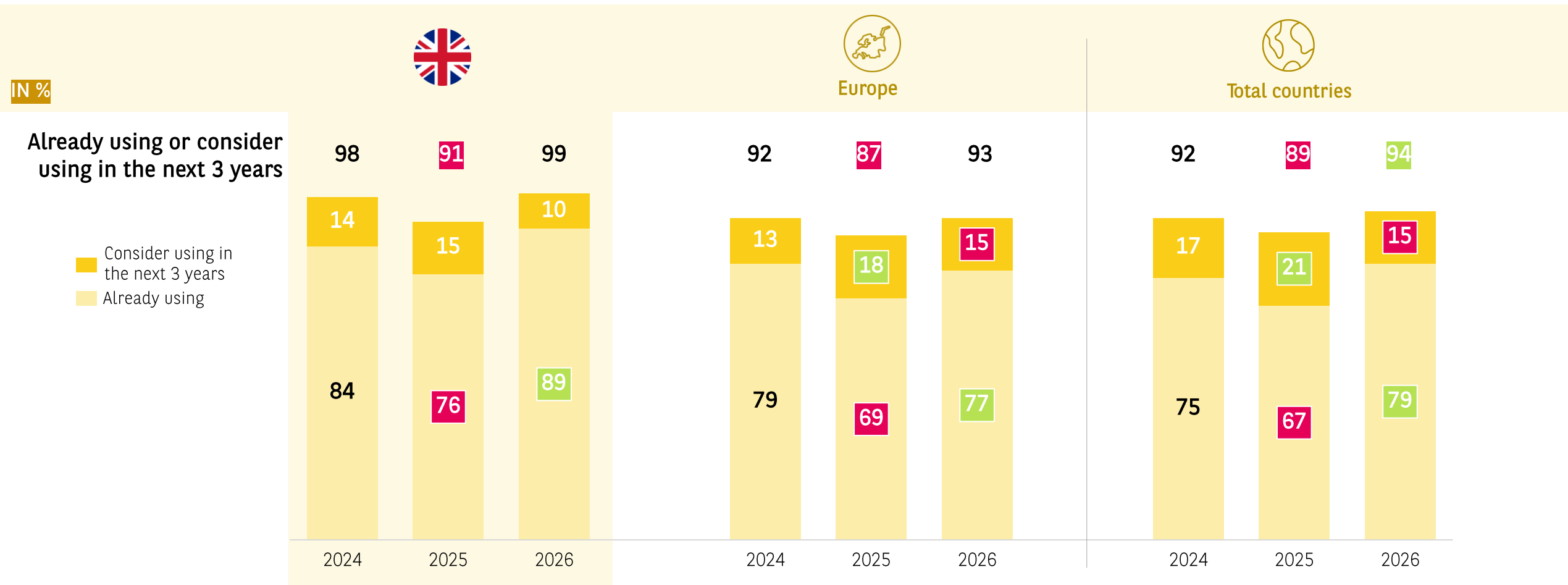
Basis: companies with corporate vehicles = 100%

MOBILITY POLICIES AND SOLUTIONS IMPLEMENTATION

AT LEAST ONE MOBILITY POLICY AND SOLUTION

HOW TO READ THE RESULTS ?

Overall in United Kingdom in 2026, 99% 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%

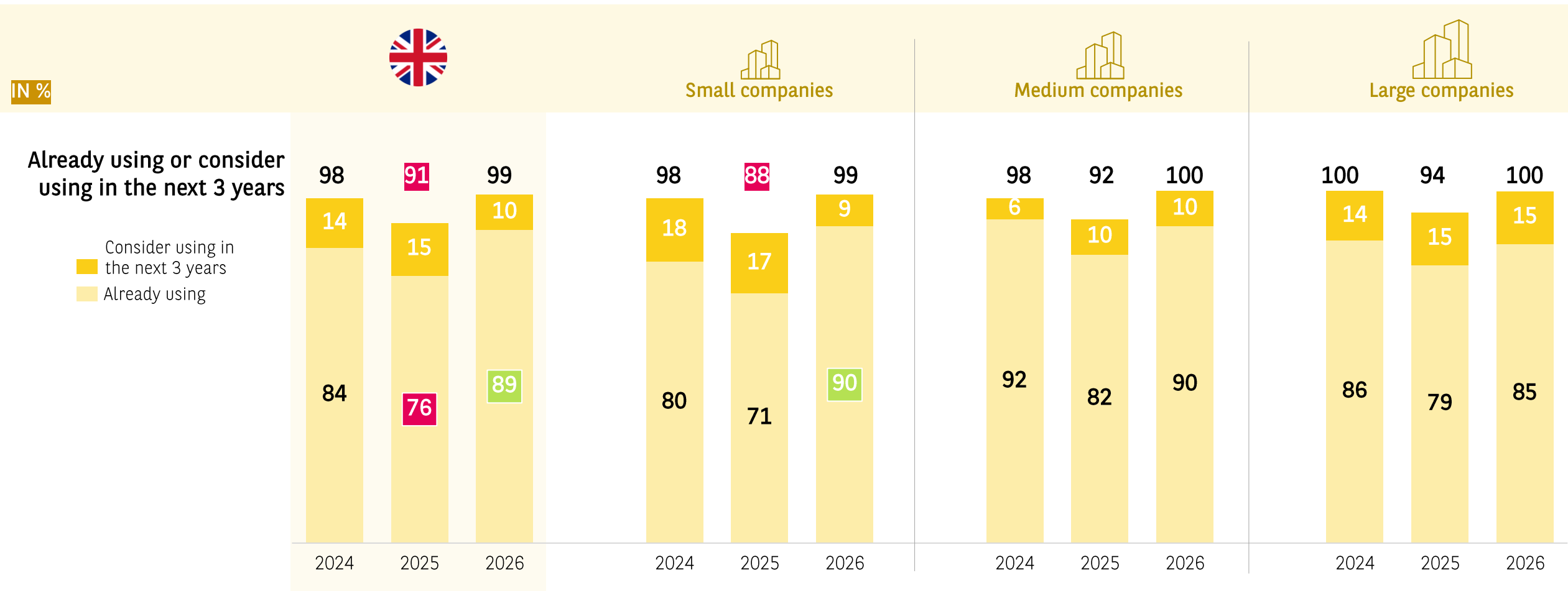
X% Significantly higher / lower vs. previous wave

MOBILITY POLICIES AND SOLUTIONS IMPLEMENTATION

AT LEAST ONE MOBILITY POLICY AND SOLUTION

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 99% 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%

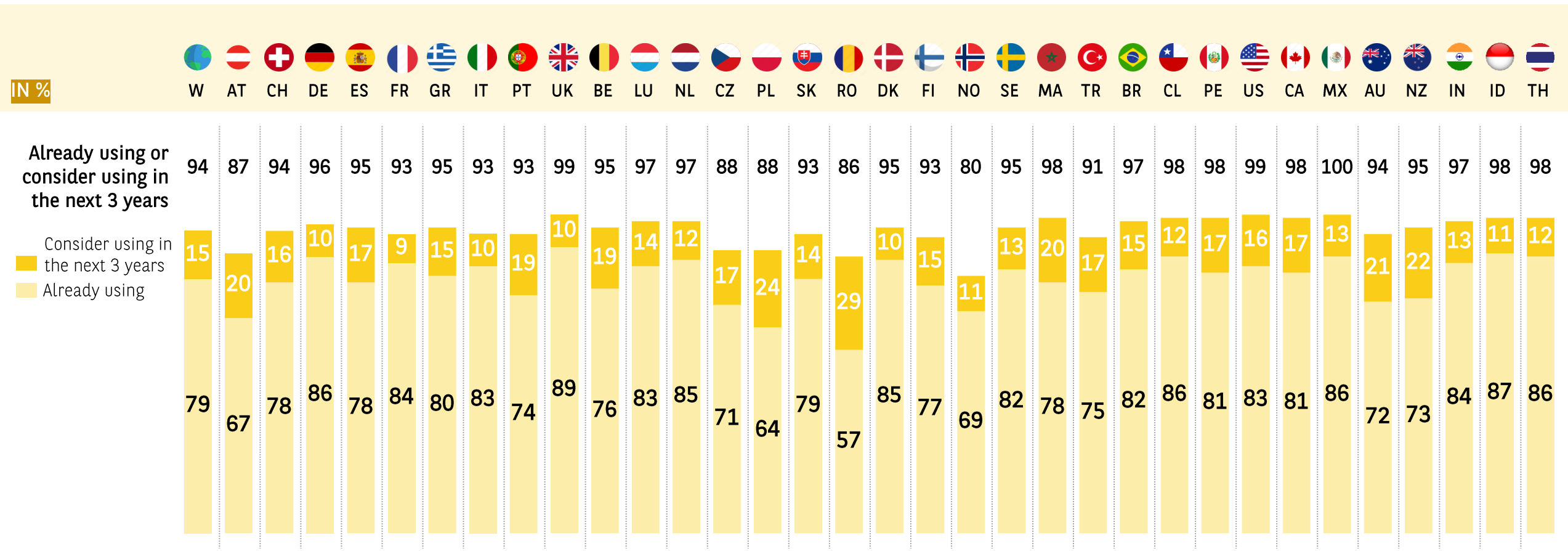
X% Significantly higher / lower vs. previous wave

MOBILITY POLICIES AND SOLUTIONS IMPLEMENTATION

AT LEAST ONE MOBILITY POLICY AND SOLUTION

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 99% of the companies are already using at least one mobility policy or solution or are considering doing so in the next 3 years.



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

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 36% 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 United Kingdom in 2026, 36% of the companies are already using Public transport expense reimbursement or are considering doing so in the next 3 years.



Europe

Total countries

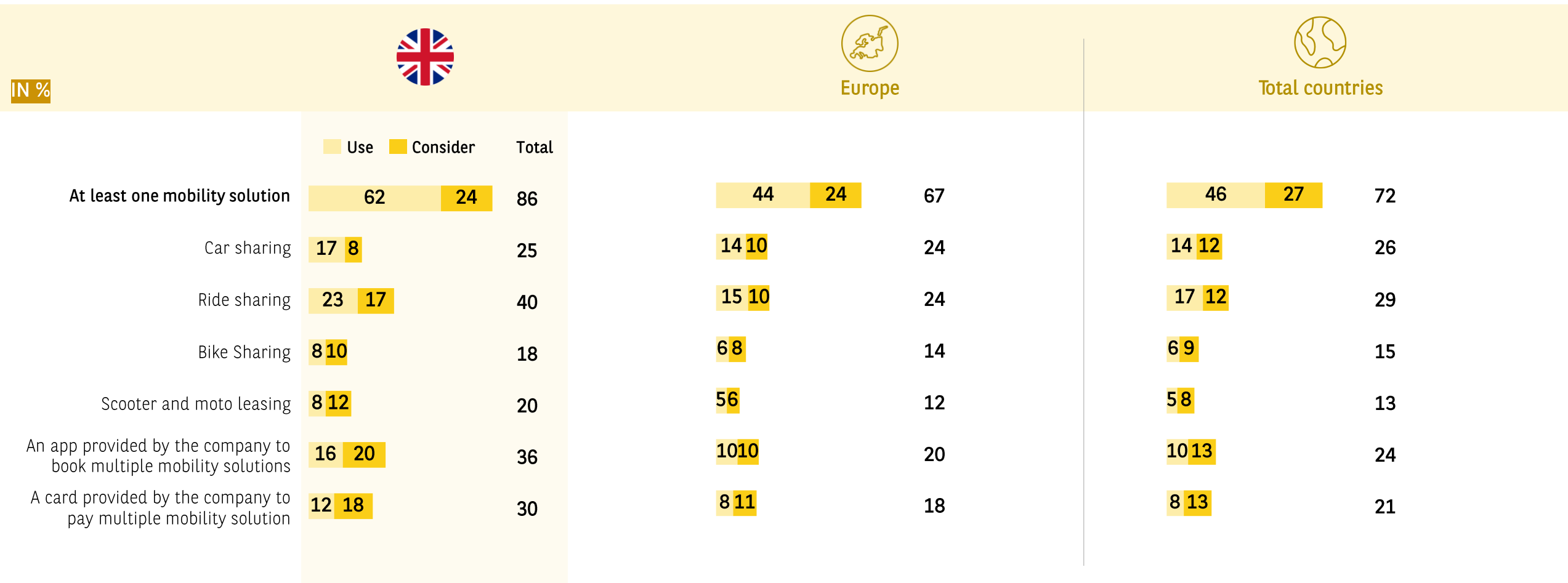
	IN %	2024	2025	2026	2024	2025	2026	2024	2025	2026
Public transport expense reimbursement	Use	26	23	27	23	21	22	21	19	21
	Total (use + consider)	37	31	36	32	33	33	31	32	33
Personal vehicle expense reimbursement	Use		12	15		8	10		8	10
	Total (use + consider)		25	27		16	19		19	22
Mobility Budget	Use	17	15	17	15	16	16	15	15	17
	Total (use + consider)	29	24	28	26	28	28	28	29	30
Private lease or salary sacrifice	Use	19	7	20	15	6	14	13	6	14
	Total (use + consider)	45	22	42	24	13	24	24	15	25
A short or mid term rental vehicle	Use	22	15	19	19	18	19	17	17	18
	Total (use + consider)	31	28	26	28	28	28	27	29	28
Car or cash allowance	Use	15	19	22	17	18	18	17	17	19
	Total (use + consider)	26	31	31	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 United Kingdom in 2026, 25% of the companies are already using Car sharing or are considering doing so in the next 3 years.



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

Basis: companies with corporate vehicles = 100%

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 25% 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	17	16	17	12	13	14	12	12	14
	Total (use + consider)	23	23	25	21	23	24	23	23	26
Ride sharing or car pooling	Use	24	9	23	18	7	15	19	8	17
	Total (use + consider)	45	27	40	28	16	24	29	19	29
Bike Sharing	Use		6	8		5	6		5	6
	Total (use + consider)		17	18		14	14		15	15
Scooter and moto leasing	Use		6	8		4	5		4	5
	Total (use + consider)		19	20		11	12		13	13
An app provided by the company to book multiple mobility solutions	Use	15	16	16	10	11	10	10	11	10
	Total (use + consider)	35	33	36	20	21	20	21	23	24
A card provided by the company to pay multiple mobility solution	Use		13	12		8	8		8	8
	Total (use + consider)		30	30		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%

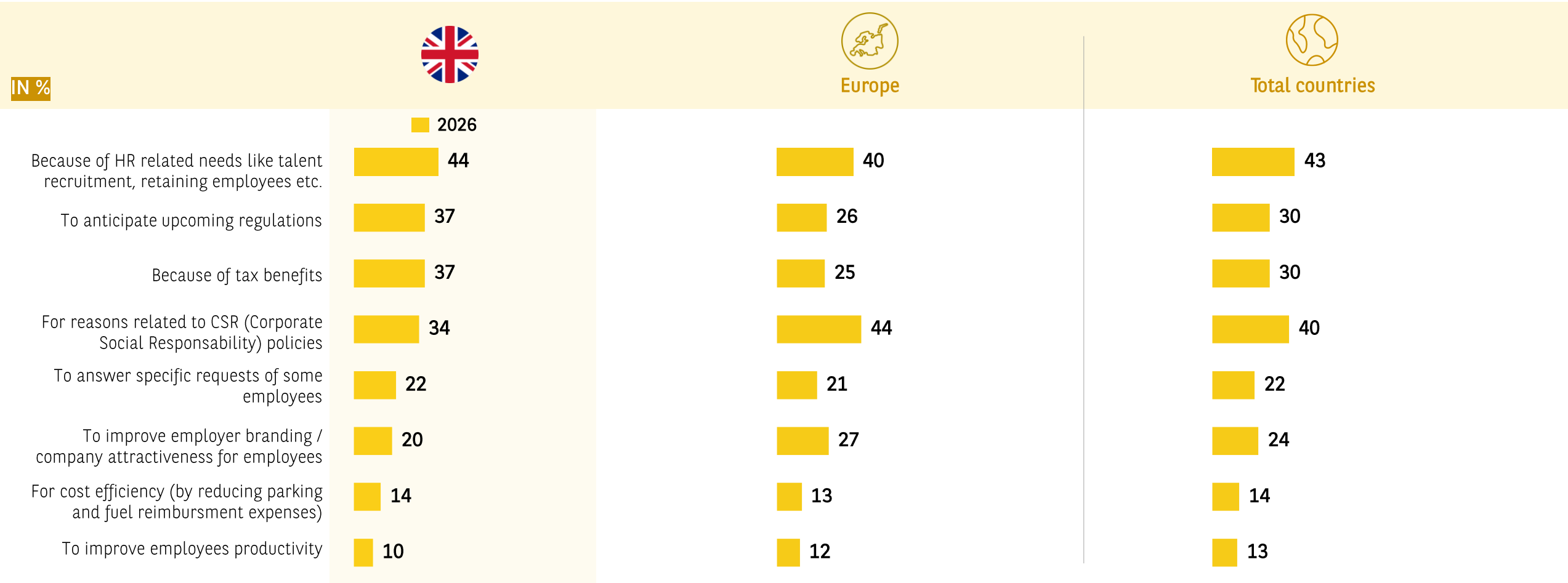
X% Significantly higher / lower vs. previous wave



REASONS FOR IMPLEMENTING MOBILITY SOLUTIONS & POLICIES

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 44% of the companies declare that the main reason for introducing mobility solutions & policies is: Because of HR related needs like talent recruitment, retaining employees etc..



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

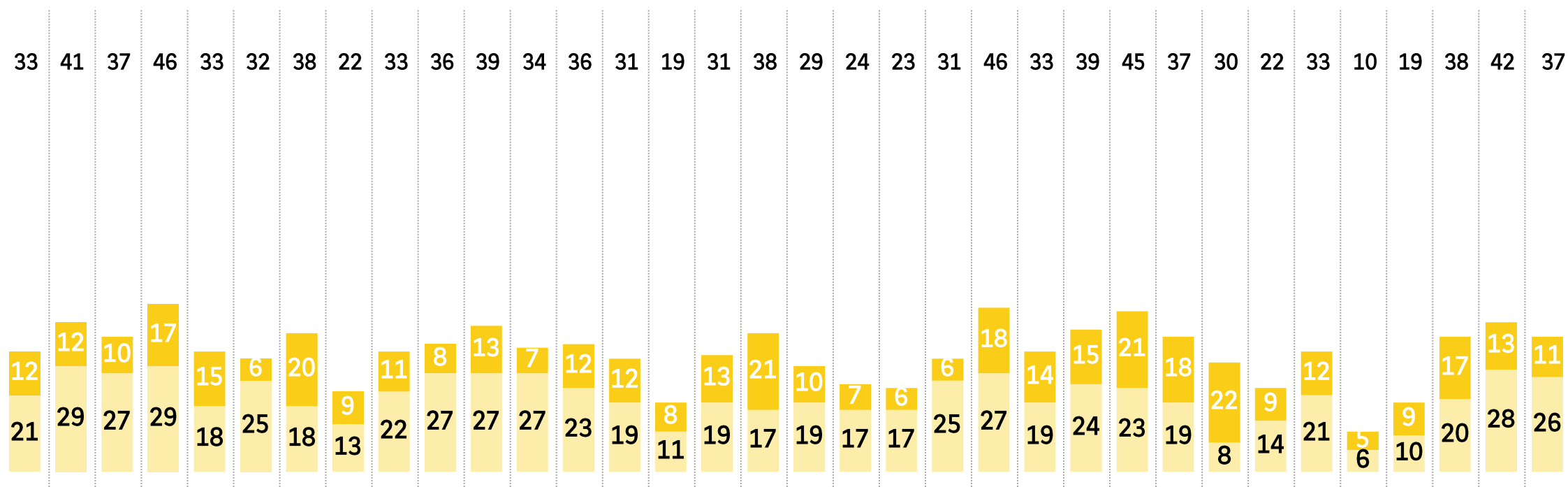


PUBLIC TRANSPORT EXPENSE REIMBURSEMENT

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 36% 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 ?

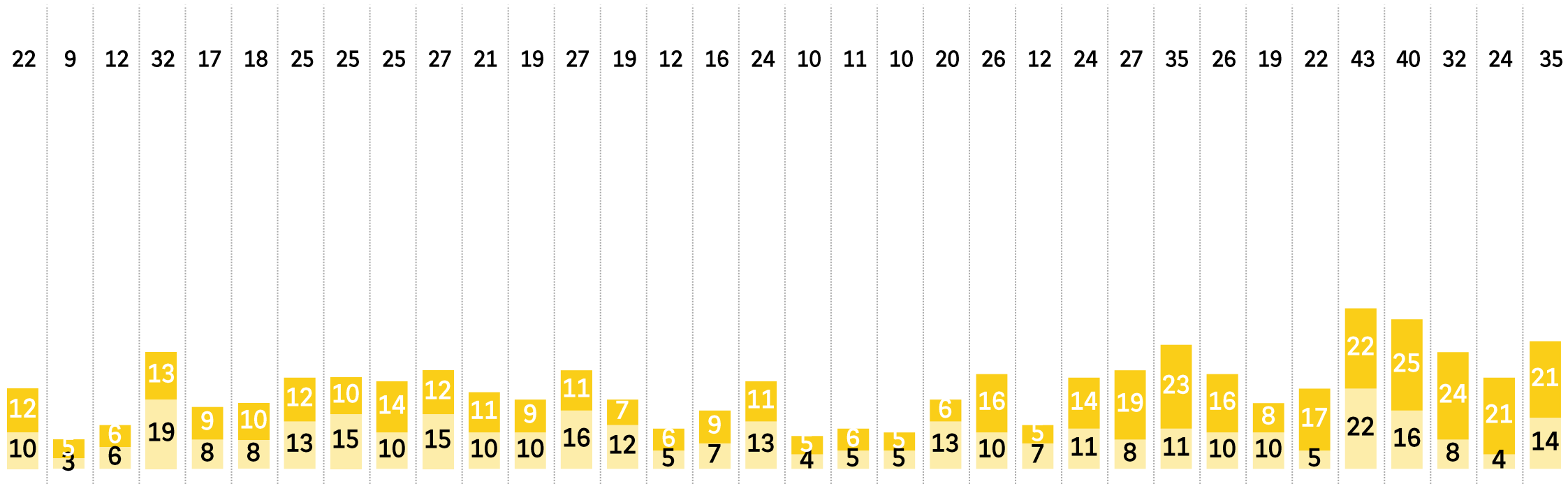
In United Kingdom in 2026, 27% of the companies are already using Personal vehicle expense reimbursement or are considering doing so in the next 3 years.

IN %



Already using or consider in the next 12 months

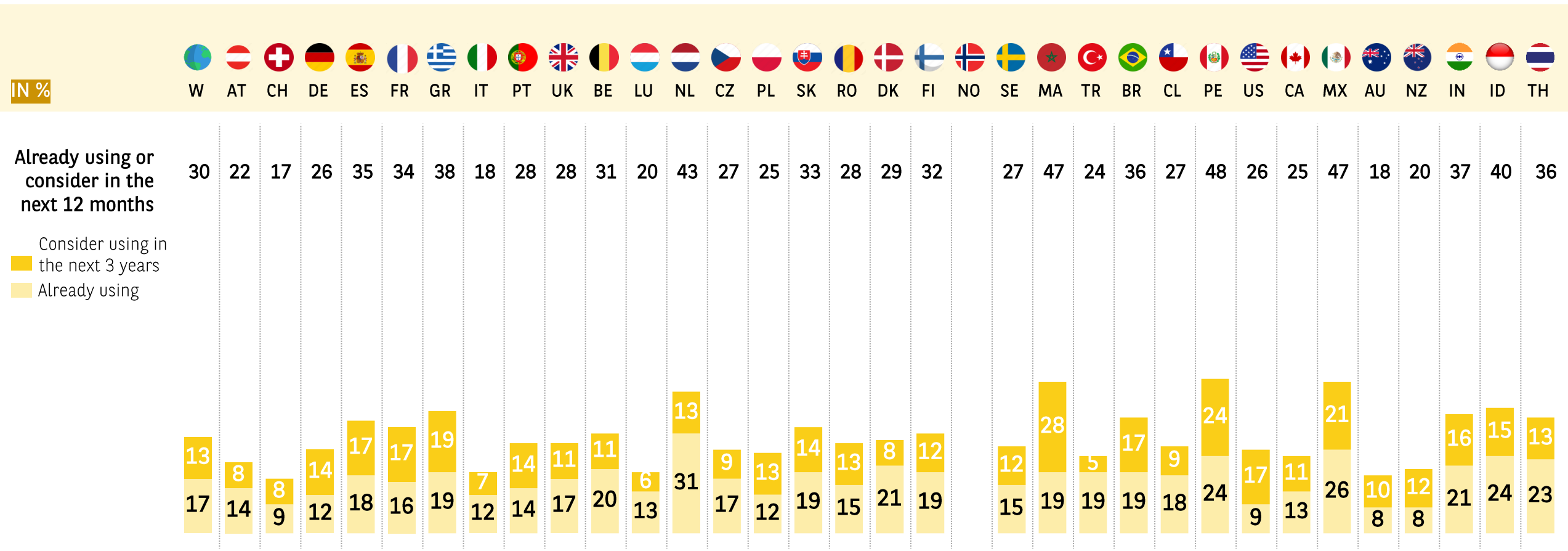
Consider using in the next 3 years
Already using



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

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 28% of the companies are already using Mobility Budget or are considering doing so in the next 3 years.

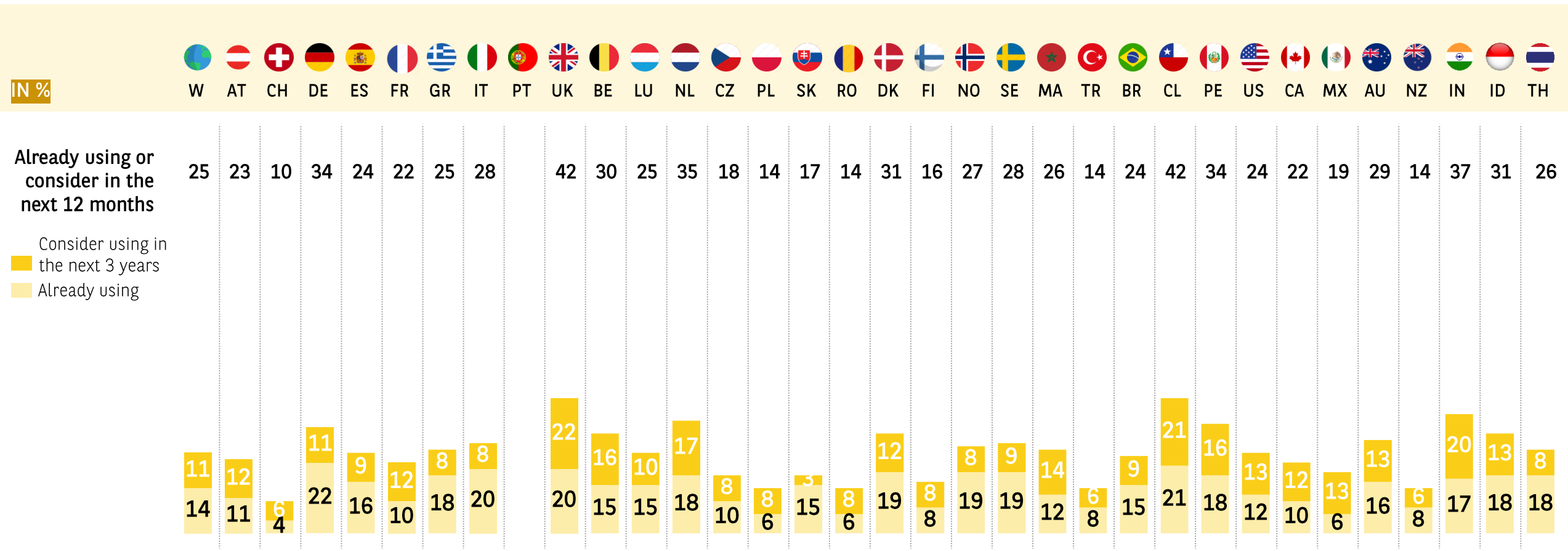


MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

PRIVATE LEASE OR SALARY SACRIFICE

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 42% of the companies are already using Private lease or salary sacrifice 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?

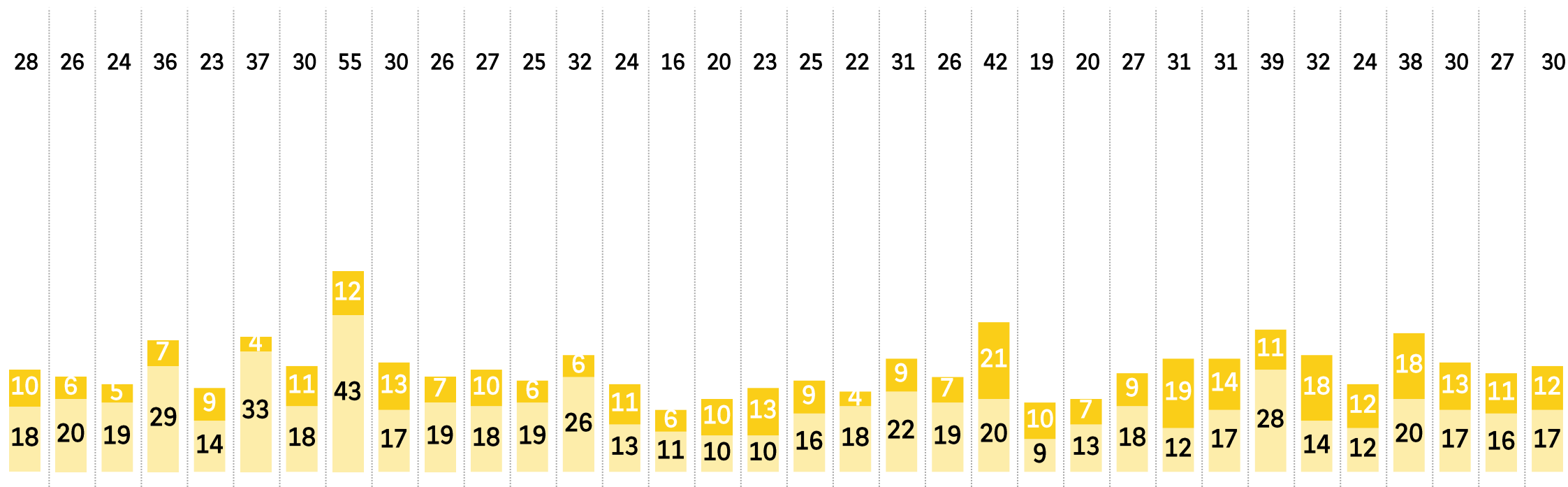
Basis: companies with corporate vehicles = 100%

SHORT OR MID TERM RENTAL VEHICLE

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 26% of the companies are already using short or mid term rental vehicle or are considering doing so in the next 3 years.

IN %



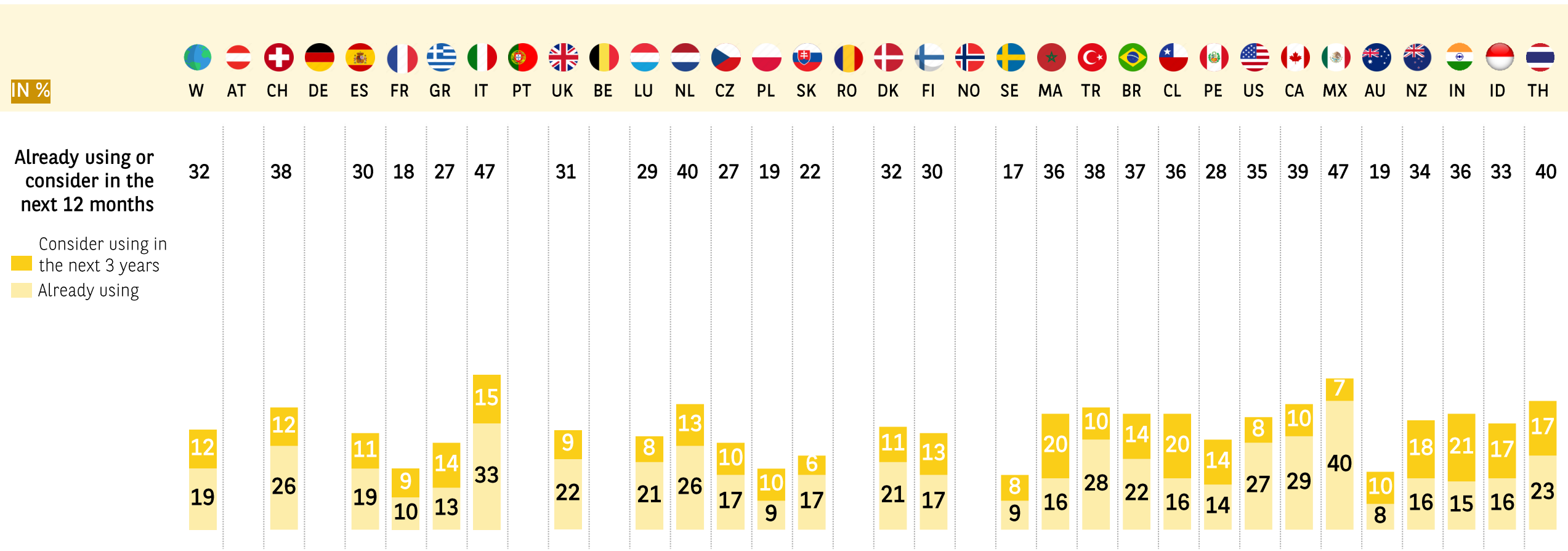
MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%



CAR OR CASH ALLOWANCE

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 31% of the companies are already using Car or cash allowance or are considering doing so in the next 3 years.



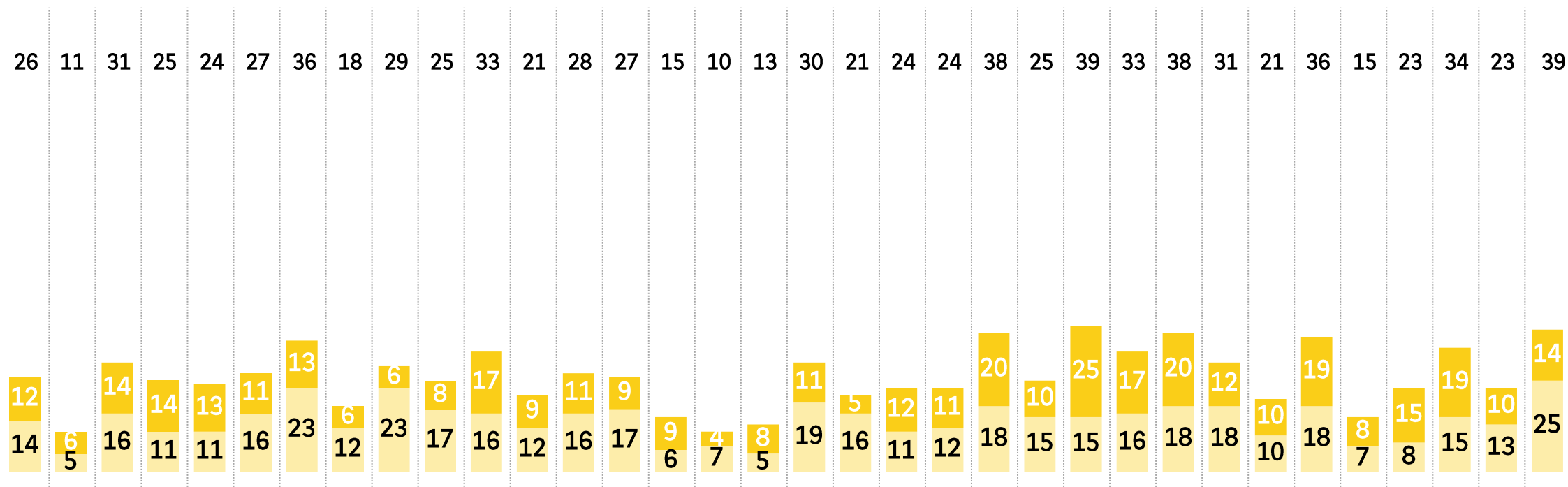
MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

CAR SHARING / POOLED VEHICLES

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 25% of the companies are already using Car sharing / pooled vehicles or are considering doing so in the next 3 years.

IN %



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

Basis: companies with corporate vehicles = 100%

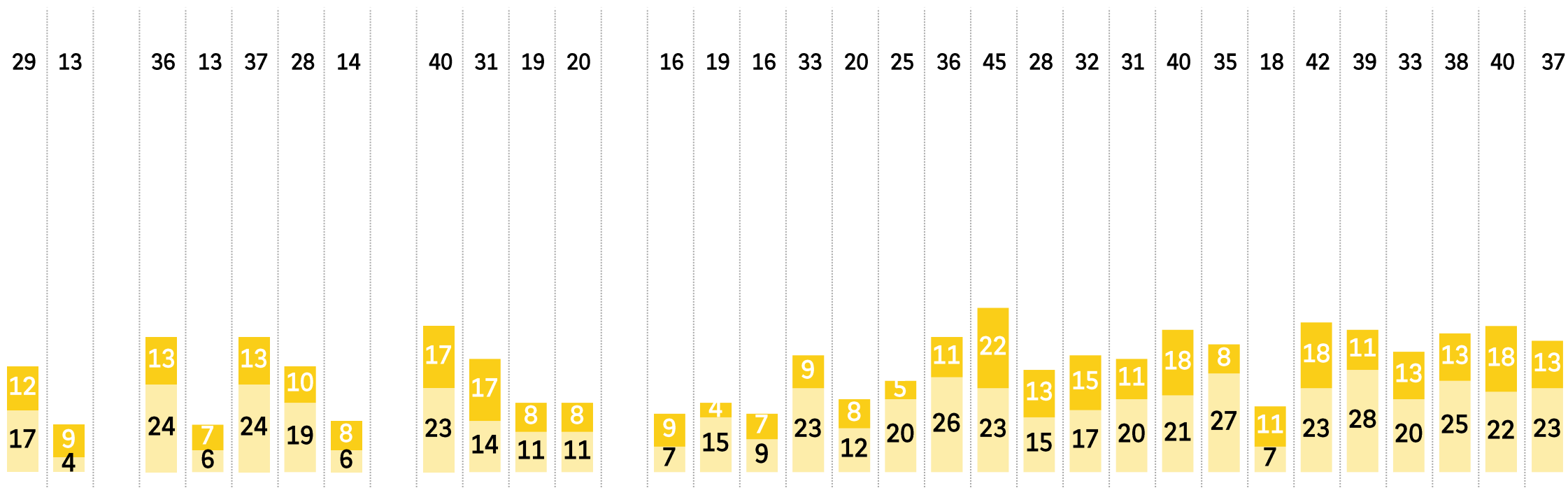


RIDE SHARING / CARPOOLING

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 40% of the companies are already using Ride sharing / carpooling or are considering doing so in the next 3 years.

IN%



MM15. Which of the following mobility 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 ?

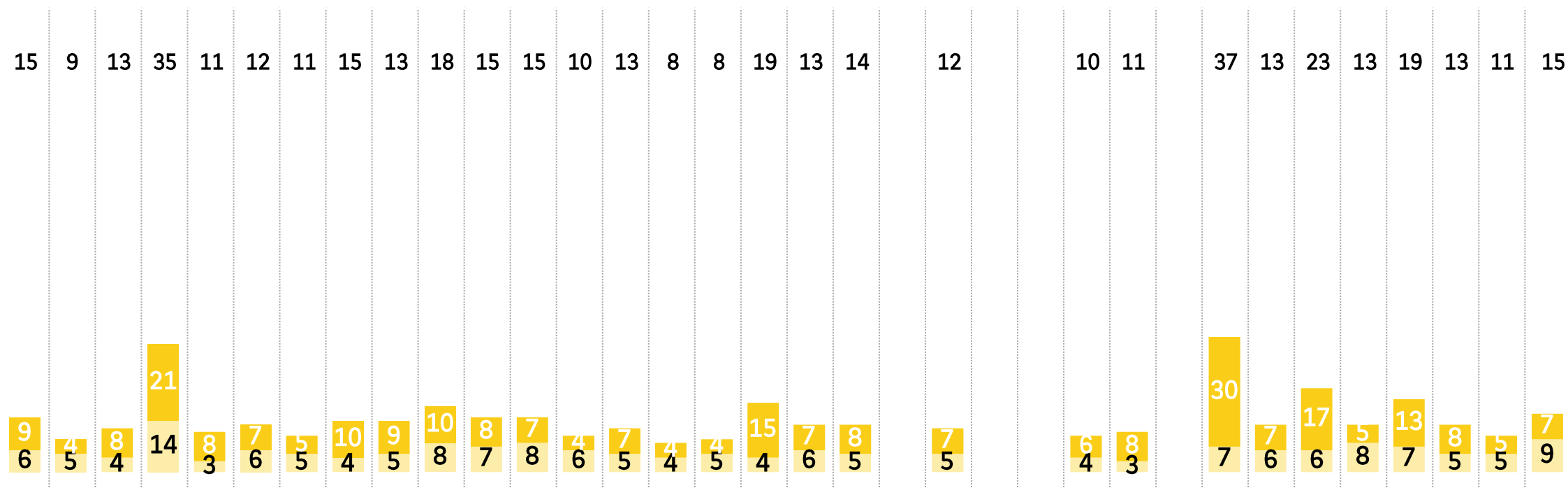
In United Kingdom in 2026, 18% of the companies are already using Bike sharing or are considering doing so in the next 3 years.

IN %



Already using or consider in the next 12 months

Consider using in the next 3 years
Already using



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

SCOOTER AND MOTO LEASING

HOW TO READ THE RESULTS ?

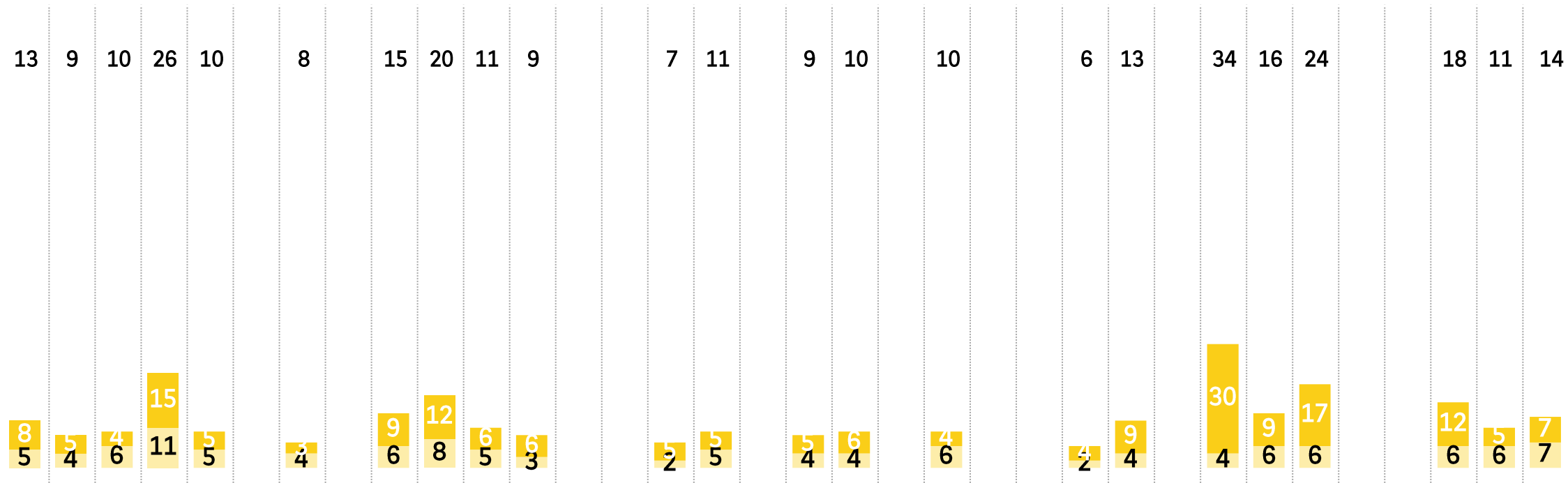
In United Kingdom in 2026, 20% of the companies are already using Scooter and moto leasing or are considering doing so in the next 3 years.

IN %



Already using or consider in the next 12 months

Consider using in the next 3 years
Already using



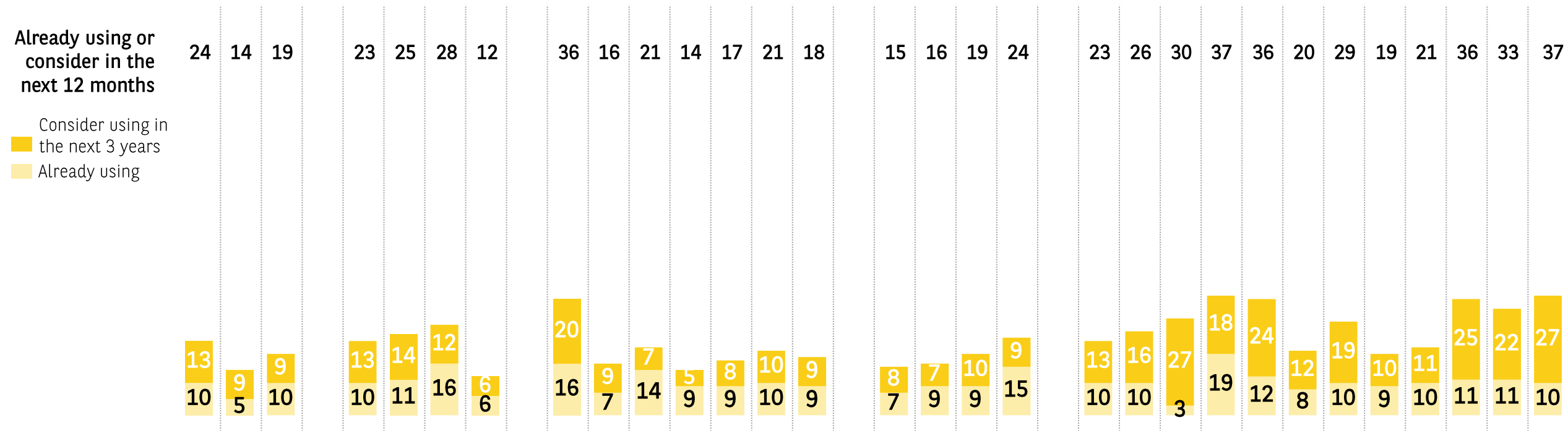
MM15. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

AN APP PROVIDED BY THE COMPANY TO BOOK MULTIPLE MOBILITY SOLUTIONS

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 36% of the companies are already using An app provided by the company to book multiple mobility solutions or are considering doing so in the next 3 years.

IN %

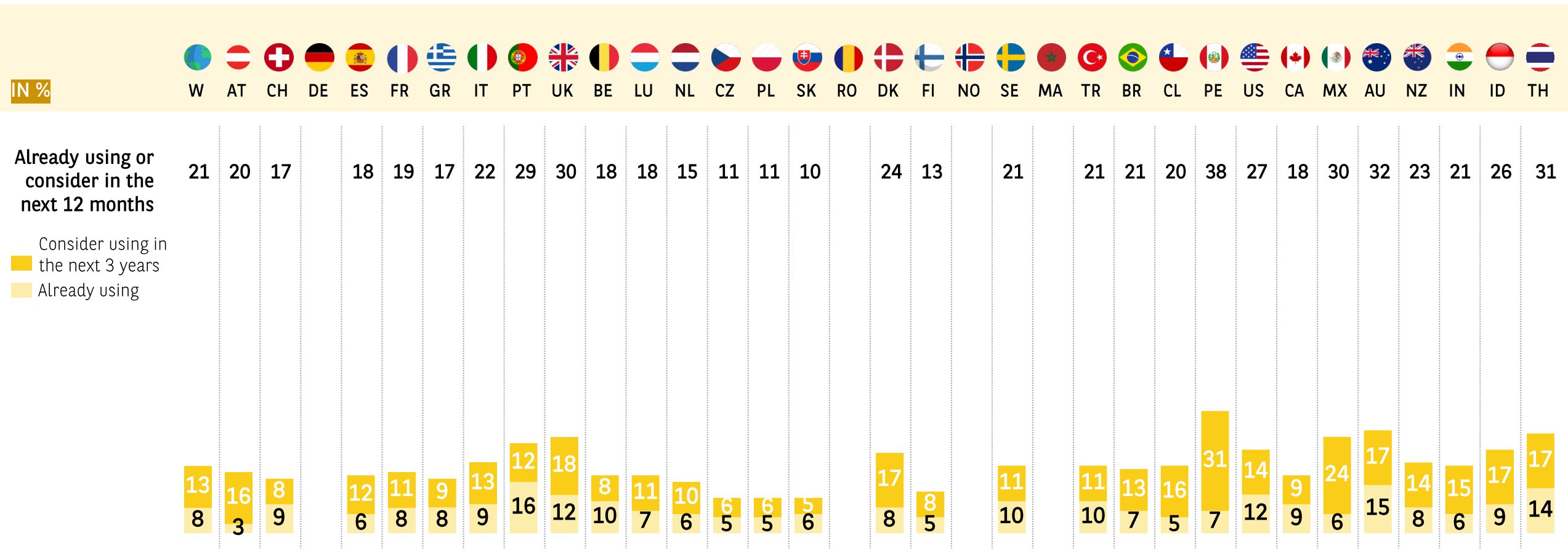


MM15. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

A CARD PROVIDED BY THE COMPANY TO PAY MULTIPLE MOBILITY SOLUTION

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 30% of the companies are already using A card provided by the company to pay multiple mobility solution or are considering doing so in the next 3 years.



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

06

FUTURE CHALLENGES

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



Establishing specific decarbonization goals remains limited

Overall, 16% of companies in the UK have set targeted decarbonization goals, showing consistent results across company sizes and aligning with the European average. Meanwhile, 34% are currently evaluating such goals, which is higher than the European level (27%). Medium-sized companies are especially considering this (47%).

Still a rather limited weight of employee mobility: only 14% of companies with decarbonization targets consider employee mobility as significant contributor to their decarbonization target, while 31% see it as a moderate contributor.

Adapting to restrictive policies on ICE is top 1 challenge in fleet management in the future

In 2026, 38% of companies in the UK consider that adapting to restrictive policies on ICE will be their main future challenge.

The following challenges are mitigating the increase in TCO (35%) and implementing electrified vehicles (33%), both decreasing from last year, and adapting to low emission zones in urban areas (33%, stable). Inducing more responsible driving is also decreasing (29% vs. 39% in 2025).

Fleet managers in the UK face significant challenges in fleet performance management

46% of fleet manager in the UK claim they would need help in terms of fleet performance management, and more specifically they would need:

- Automated vehicle performance monitoring and predictive maintenance (21%)
- Fuel consumption monitoring and optimization (14%)
- An all-in-one fleet management software / platform (14%)
- Cost control and financial oversight of fleet operations (13%)

They would also need help in logistics and fleet operations management (29%):

- Fleet allocation, operations coordination and optimization (15%)
- Route and delivery optimization (13%)

19% would also need vehicles real-time tracking and monitoring.

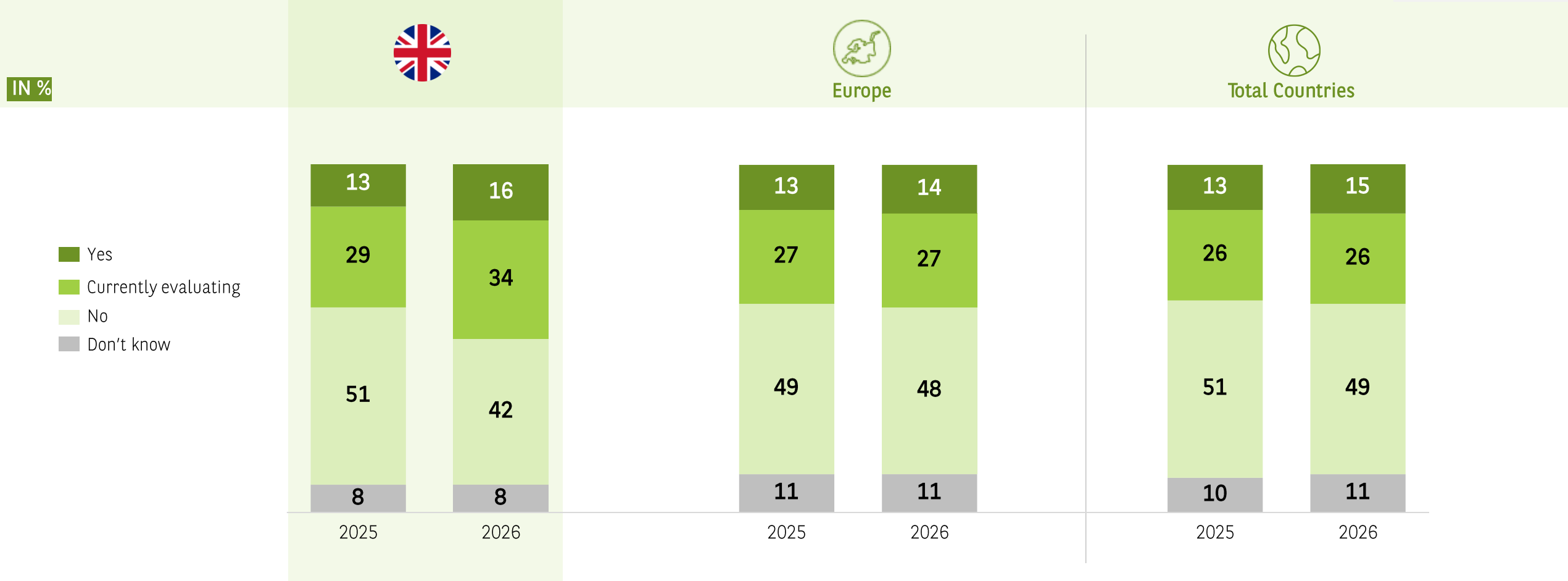


DECARBONIZATION GOALS

HOW TO READ THE RESULTS ?

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

Change of question



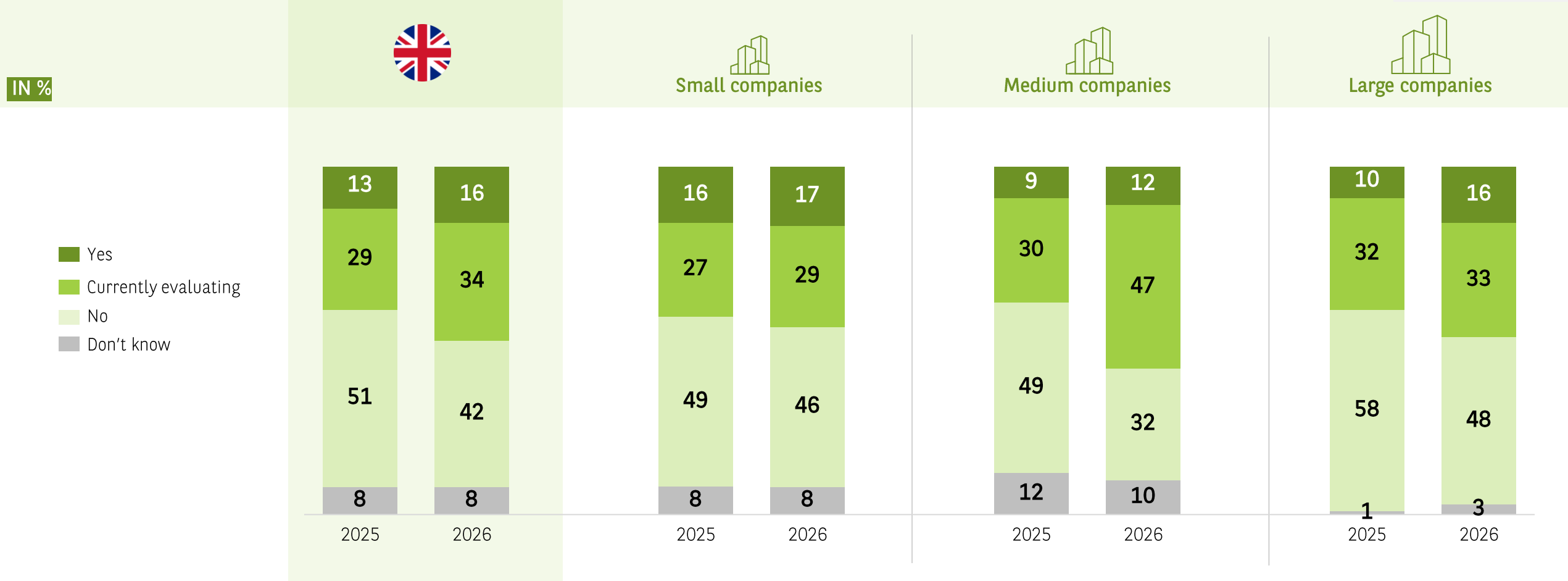
A56. Does your organization have targeted decarbonization goals? It is not limited to fleet, for instance "Net 0"
Basis: companies with corporate vehicles = 100%

DECARBONIZATION GOALS

HOW TO READ THE RESULTS ?

In United Kingdom 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%

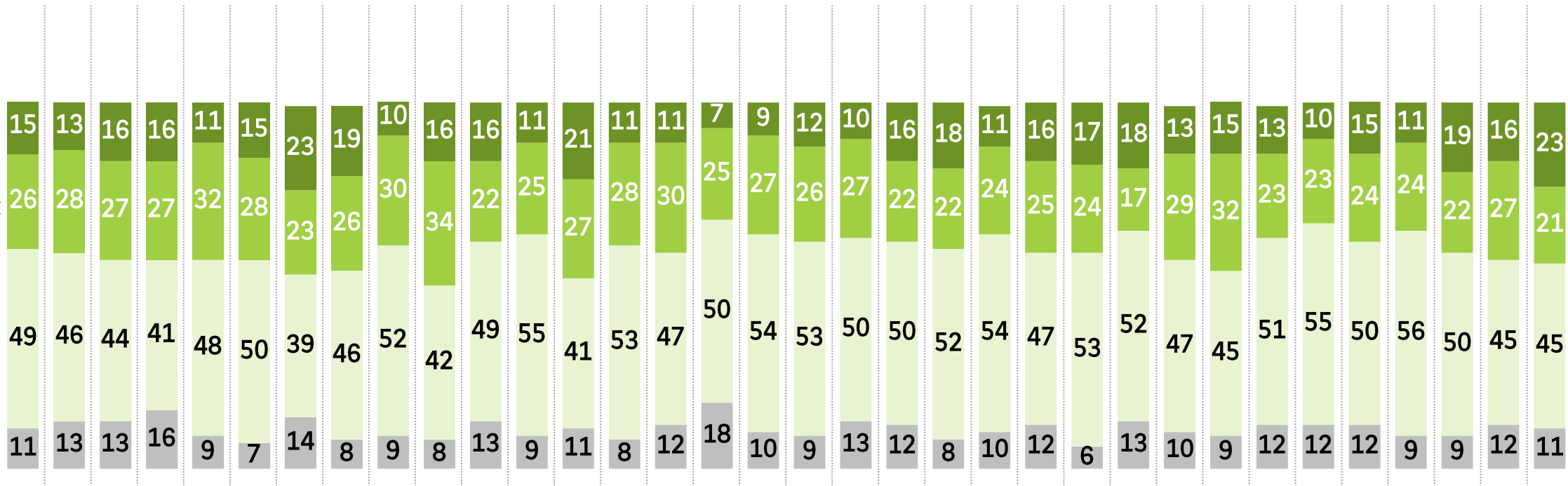
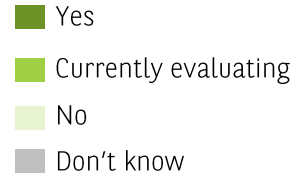
DECARBONIZATION GOALS

HOW TO READ THE RESULTS ?

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

Change of question

IN %



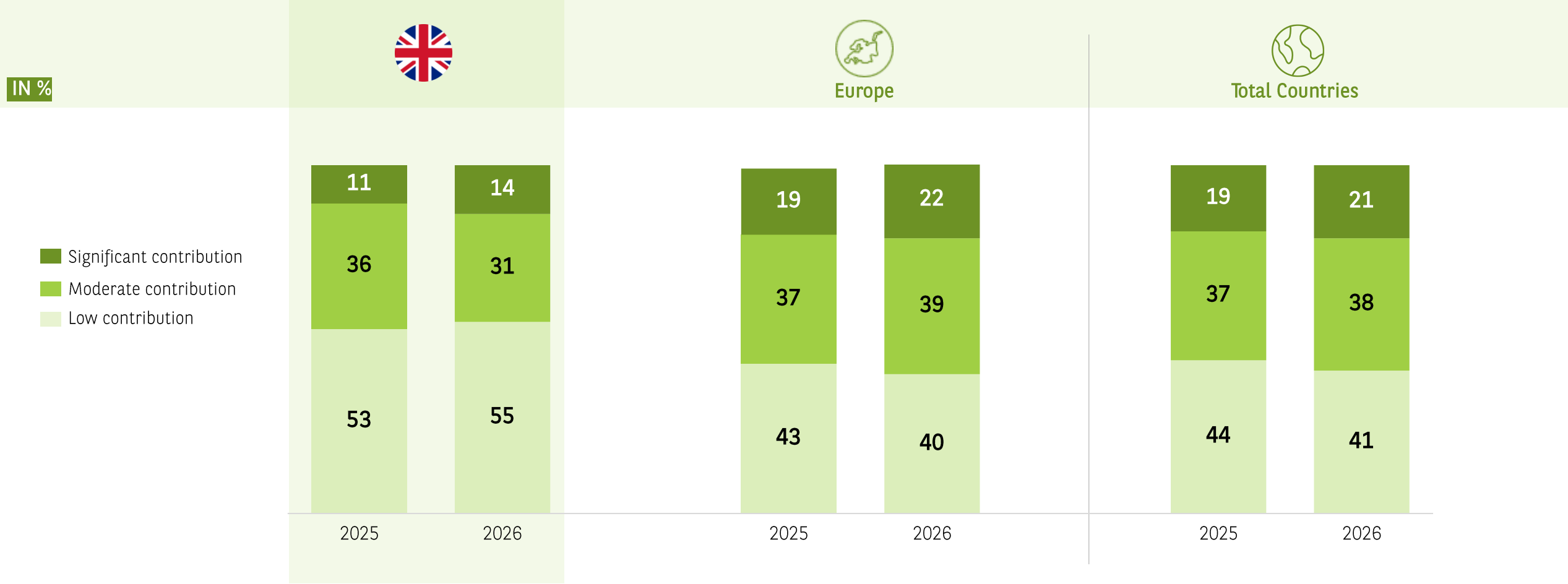
A56. Does your organization have targeted decarbonization goals? It is not limited to fleet, for instance "Net 0"
Basis: companies with corporate vehicles = 100%



IMPORTANCE OF EMPLOYEE'S MOBILITY TO DECARBONIZATION GOALS

HOW TO READ THE RESULTS ?

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



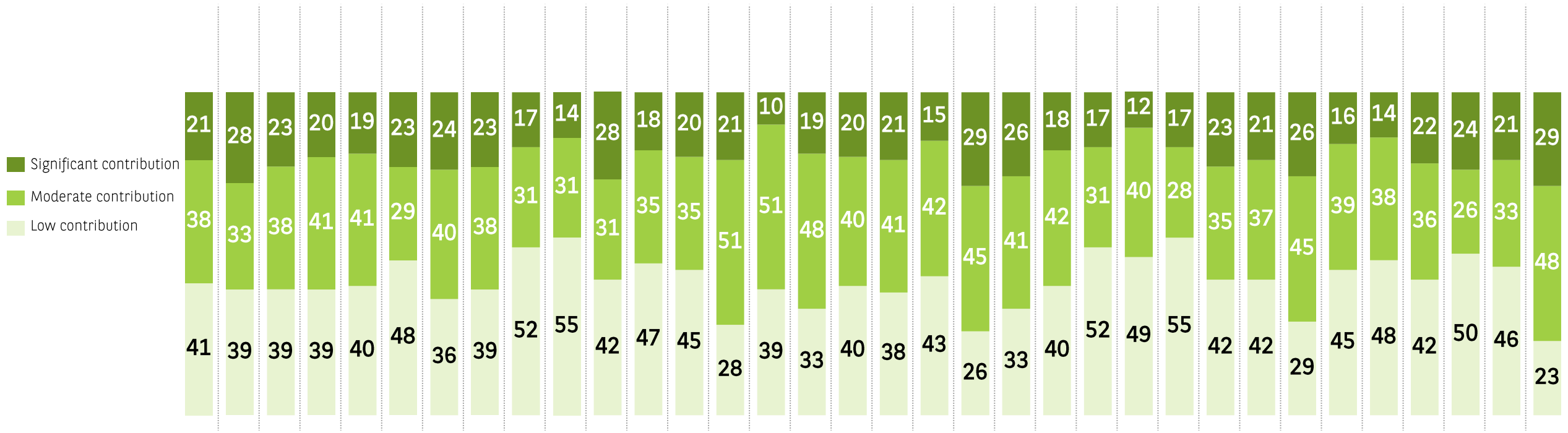
A57. How would you rate the contribution of employees' mobility in these decarbonization targets?
Basis: companies that have targeted decarbonization goals

IMPORTANCE OF EMPLOYEE'S MOBILITY TO DECARBONIZATION GOALS

HOW TO READ THE RESULTS ?

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

IN %

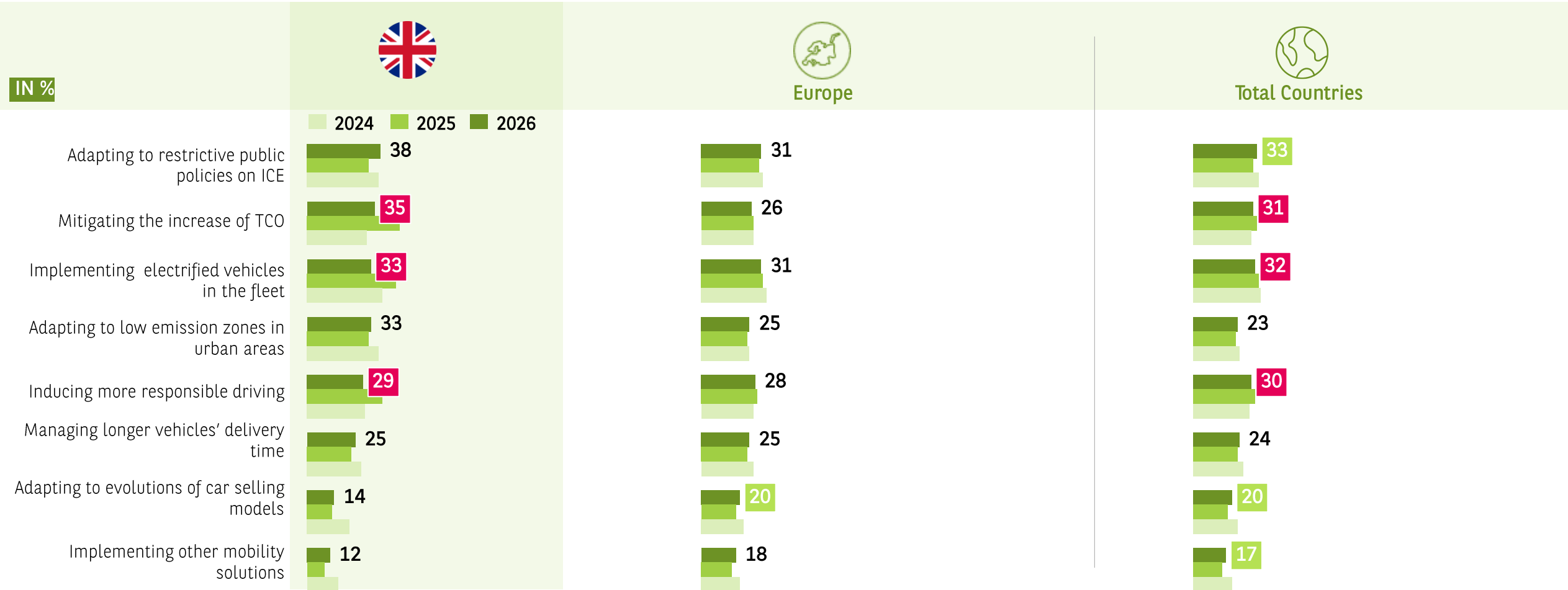


A57. How would you rate the contribution of employees' mobility in these decarbonization targets?
Basis: companies that have targeted decarbonization goals

THREE MAIN CHALLENGES FOR FLEET MANAGEMENT IN THE N3Y

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 38% of the companies declare that Adapting to restrictive public policies on ICE is in the top 3 challenges for fleet management in the next 3 years.



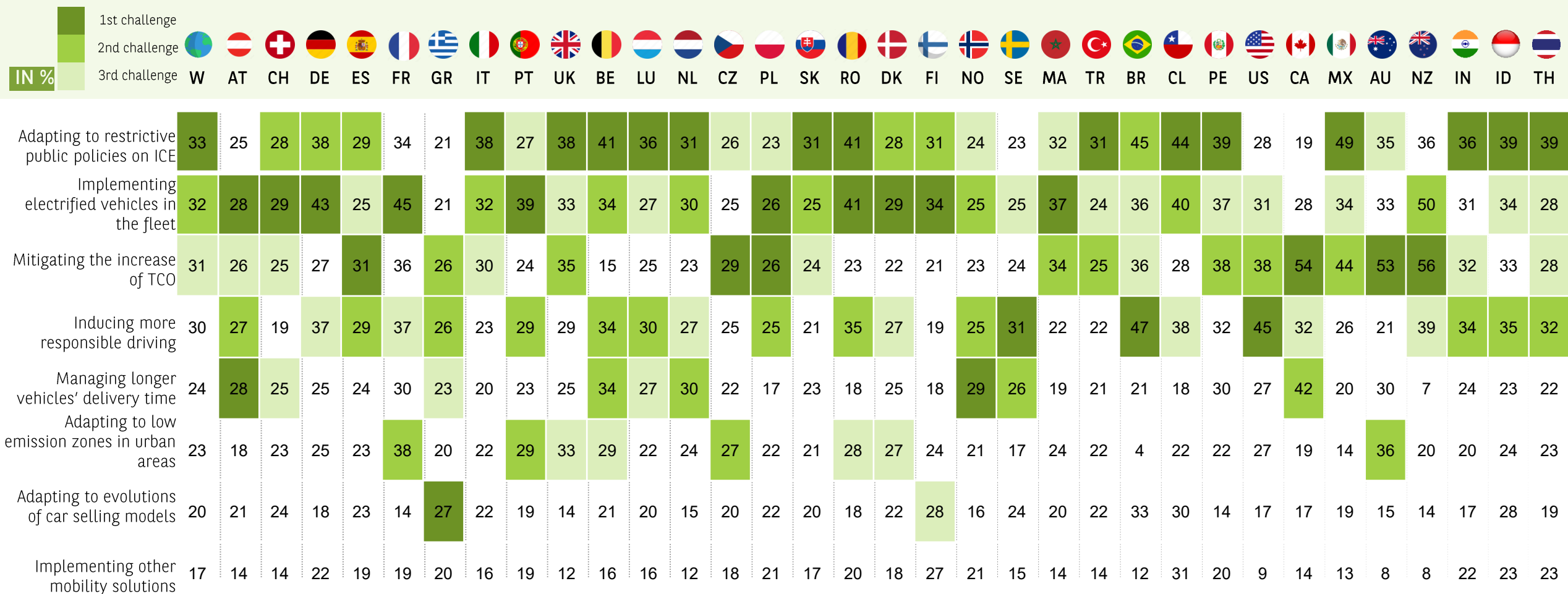
A11. According to you, what will be the three main challenges for fleet management in the next 3 years?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

THREE MAIN CHALLENGES FOR FLEET MANAGEMENT IN THE N3Y

HOW TO READ THE RESULTS ?

In United Kingdom in 2026, 38% of the companies declare that Adapting to restrictive public policies on ICE is in the top 3 challenges for fleet management in the next 3 years.



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

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






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

OPEN-ENDED QUESTION: WHAT WOULD HELP FLEET MANAGERS?

HOW TO READ THE RESULTS ?

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

New question

IN %		 Europe	 Total Countries
Fleet performance management	46%	43%	44%
Automated vehicle performance monitoring and predictive maintenance	21%	17%	18%
Fuel consumption monitoring and optimization	14%	13%	13%
An all-in-one fleet management software / platform	14%	14%	14%
Cost control and financial oversight of fleet operations	13%	11%	11%
Logistics and fleet operations management	29%	26%	27%
Fleet allocation, operations coordination and optimization	15%	13%	14%
Route and delivery optimization	13%	14%	15%
Intelligent cargo and load optimization	4%	2%	2%
Driver and safety	23%	21%	21%
Vehicles real-time tracking and monitoring	19%	17%	17%
Fleet security and protection systems	4%	2%	2%
Driver management and safety standards implementation	2%	3%	3%
Administrative & Compliance	10%	9%	9%
Centralizing and digitizing fleet documentation	8%	7%	7%
Proactive compliance deadline management	3%	2%	2%
Environment & Sustainability	5%	5%	5%
Support for the adoption and management of electric vehicles	2%	2%	2%
Tools and practices for a sustainable fleet management	2%	2%	2%
Vehicle emissions monitoring	1%	2%	2%
Others	23%	23%	22%
Other	20%	21%	20%
Enhanced refrigerated vehicles	2%	2%	2%

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



VERBATIM FOR TOP 3 TOPICS

Automated vehicle performance monitoring and predictive maintenance

21%



“Automated alerts for maintenance deadlines, to keep the fleet operational at all times and reduce the risk of breakdowns”

Vehicles real-time tracking and monitoring

19%



“An application that allows me to track vehicles and equipment in real time at different remediation sites”

Fleet allocation, operations coordination and optimization

15%



“A centralised system that plans routes, monitors vehicle availability and connects to all vehicles, visible from all employees' smartphones”

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

New question

IN %



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

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



OPEN-ENDED QUESTION: WHAT WOULD HELP FLEET MANAGERS?

HOW TO READ THE RESULTS ?

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

New question

IN %



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

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

APPENDIX



Vehicles in fleets

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

Financing methods

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

Electrified vehicles technologies

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

Telematics

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

Mobility policies

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

Mobility solutions

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



COMPANY SIZE SEGMENT DEFINITION



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

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

THANK YOU