

2025

THE FUTURE OF FLEET & MOBILITY: KEY TRENDS SHAPING 2025 AND BEYOND

Insights from the Arval Mobility Observatory Global Fleet and Mobility Barometer 2025



THE FUTURE OF FLEET & MOBILITY:

Key Trends shaping 2025 and beyond.

The Arval Mobility Observatory Global Fleet and Mobility Barometer

2025



8061

interviews

28

countries

3 main areas of transformation:



ENVIRONMENTAL SUSTAINABILITY



COST EFFICIENCY



EMPLOYEE SATISFACTION



ENVIRONMENTAL SUSTAINABILITY

85%

of companies have or plan to have a charging policy.

69%

of companies with passenger cars are using or considering using alternative energy technologies.



COST EFFICIENCY

37%

of companies intend to introduce or increase the use of full-service leasing in next three years.

41%

of companies are already including second-hand vehicles in their fleets.



EMPLOYEE SATISFACTION

45%

of companies mention HR needs such as talent acquisition and employee retention as the main lever for developing employee mobility policies and solutions.

15%

of fleet managers with connected cars use the data from telematics today, and an additional 47% declare the intention to do so in the coming three years.

THE FUTURE OF FLEET & MOBILITY:

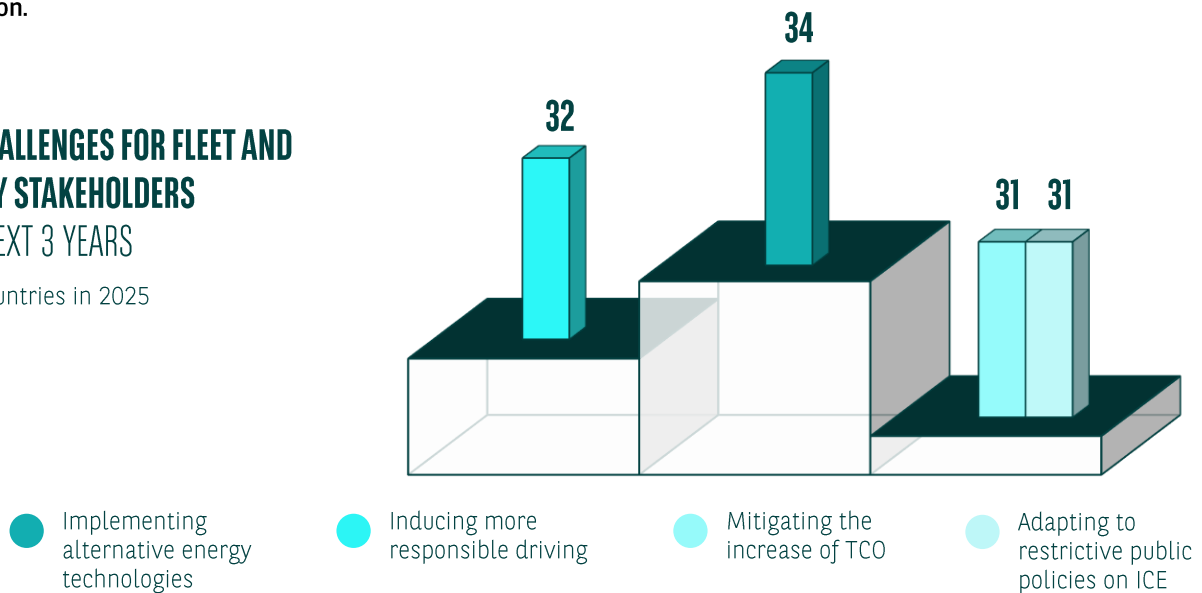
Key Trends shaping 2025 and beyond.

INSIGHTS FROM THE ARVAL MOBILITY OBSERVATORY GLOBAL FLEET AND MOBILITY BAROMETER 2025

As we look ahead to the next three years, fleet managers are poised to navigate a landscape marked by significant challenges and opportunities. The Arval Mobility Observatory's Fleet and Mobility Barometer 2025 ("The Barometer") highlights three main areas of fleet and mobility transformation, based on the main challenges and drivers expressed by the 8 061 company fleet and mobility stakeholders in 28 countries; the **three main areas being: environmental sustainability, cost efficiency and employees satisfaction.**

TOP 3 CHALLENGES FOR FLEET AND MOBILITY STAKEHOLDERS IN THE NEXT 3 YEARS

For all countries in 2025
In %



● Implementing alternative energy technologies

● Inducing more responsible driving

● Mitigating the increase of TCO

● Adapting to restrictive public policies on ICE

01/ ENVIRONMENTAL SUSTAINABILITY IS TIGHTLY LINKED TO FLEET ELECTRIFICATION

and companies are investing in the development of charging strategies, with 85% of the companies interviewed having a charging policy or planning to have one in the future.

One of the foremost challenges for fleet managers is the implementation of alternative energy technologies, with 34% of fleet managers mentioning it as being one of the top three obstacles to overcome in the coming three years. The report also indicates that 31% of companies view adapting to the restrictive public policies on Internal Combustion Engines (ICE) as a significant challenge. To comply with these regulations, companies are increasingly turning to alternative energy technologies and setting decarbonization goals.

The transition to electrified fleets is driven by a combination of environmental concerns, regulatory pressures and the need to reduce fuel expenses as well as aiming to improve the company image.

However, the speed of electrification is not the same when we look at passenger cars versus Light Commercial Vehicles (LCVs). According to the report, **69% of companies with passenger cars are already using or considering using at least one alternative energy technology in the next three years**, such as Battery Electric Vehicles (BEVs), Plug-in Hybrid Electric Vehicles (PHEVs), or Hybrid Electric Vehicles (HEVs). However, the adoption rates vary significantly by region, with Europe leading the way (75%) and Latin America (42%) lagging behind.

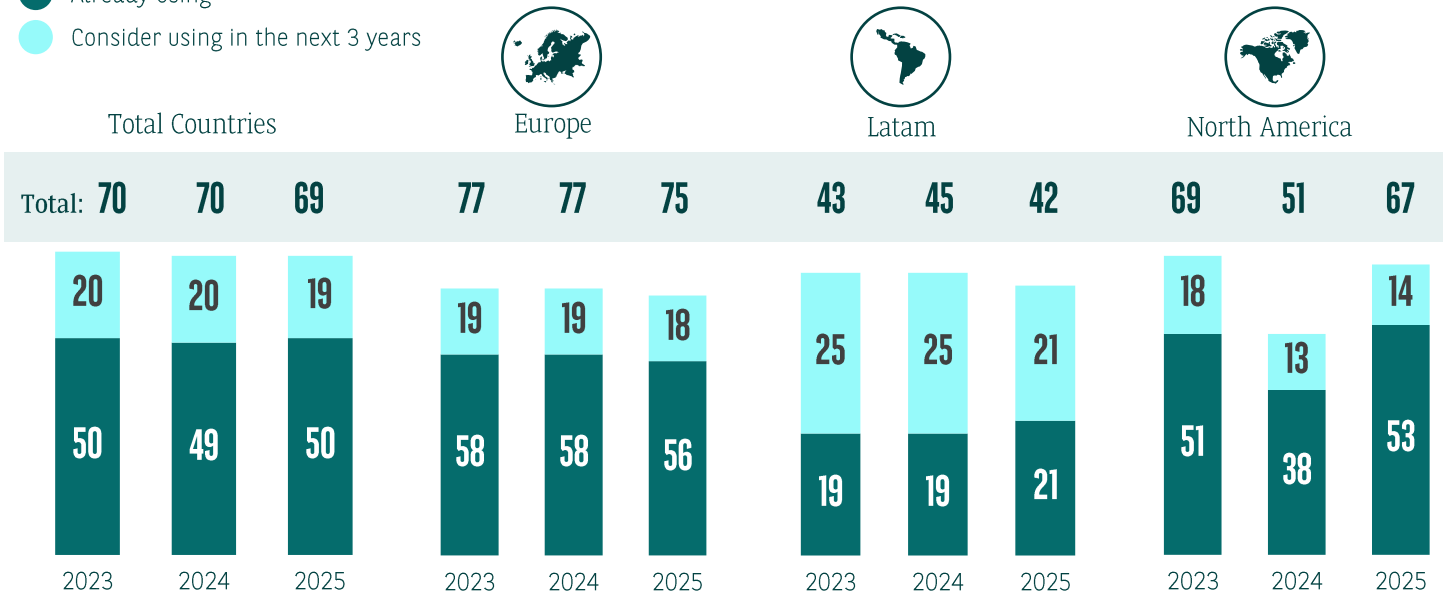
ALTERNATIVE ENERGY TECHNOLOGIES USAGE

AT LEAST ONE TECHNOLOGY AMONG BEV, PHEV, HEV

For passenger cars
In %

- Already using
- Consider using in the next 3 years

How to read the results?
69% of the companies with passenger cars, overall, in 2025 are already using at least one alternative energy technology among BEV, PHEV, HEV or are considering doing so in the next 3 years.



When it comes to LCV fleets **9% of companies are already using and 12% considering to use an electric LCV (eLCV) in the next three years**. In the context of operational challenges with eLCVs implementation, the fleet managers seem less optimistic than before about the electrification of their commercial fleets, which is reflected by the decrease in consideration of implementing eLCVs in the next three years from 15% (2024) to 12% (2025).

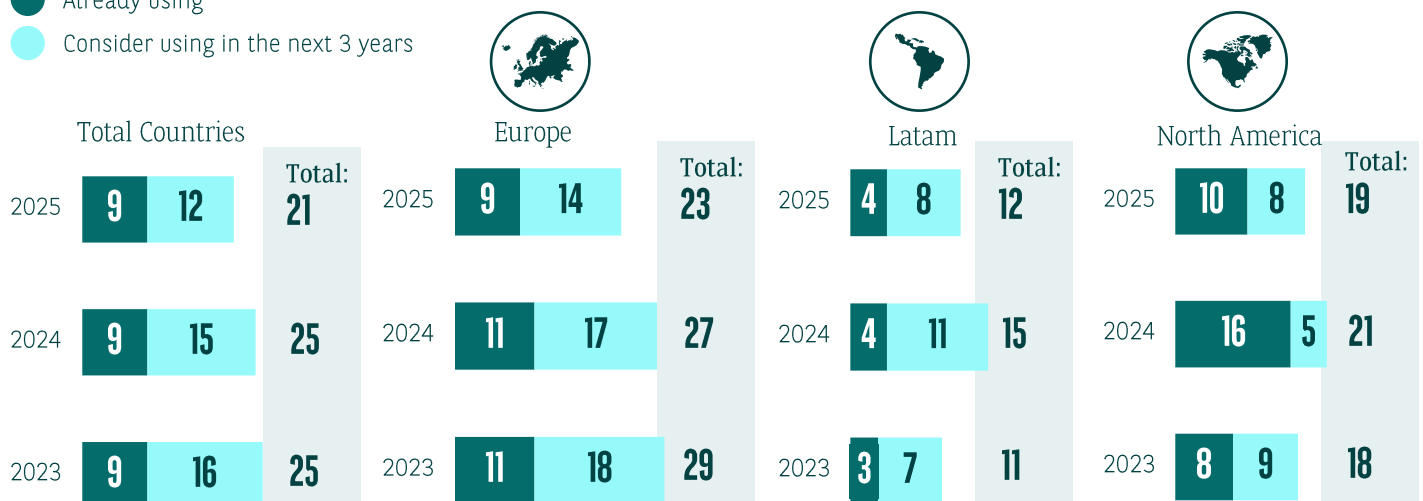
ALTERNATIVE ENERGY TECHNOLOGIES USAGE

DETAIL PER TECHNOLOGY

BEV use for companies with LCVs
In %

- Already using
- Consider using in the next 3 years

How to read the results?
21% of the companies with LCVs, overall, in 2025 are already using or consider using BEV in the next 3 years.

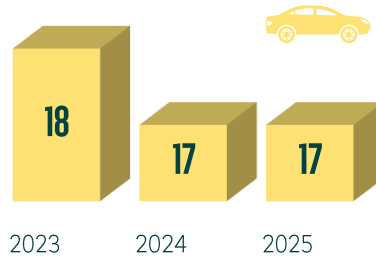


Looking at the next three years, **fleet and mobility stakeholders have declared that they expect 17% of their fleets to be BEVs (with 20% in Europe) and 10% composed of eLCVs (12% in Europe)**. These figures have remained stable or are slightly decreasing in some regions since 2023 and highlight that while electrification momentum goes on, the fleet and mobility stakeholders are cautiously optimistic about the medium term view.

EXPECTED FLEET SHARE PER ENERGY FOCUS ON PASSENGER CARS FLEET

For passengers cars, for all countries
In %

 Battery electric



How to read the results?

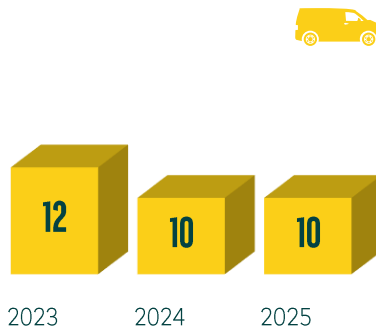
17%

of the passenger cars fleet, overall, in 3 years is expected to be BEV.

EXPECTED FLEET SHARE PER ENERGY FOCUS ON LCV FLEET

For LCV fleet, for all countries
In %

 Battery electric



How to read the results?




10%

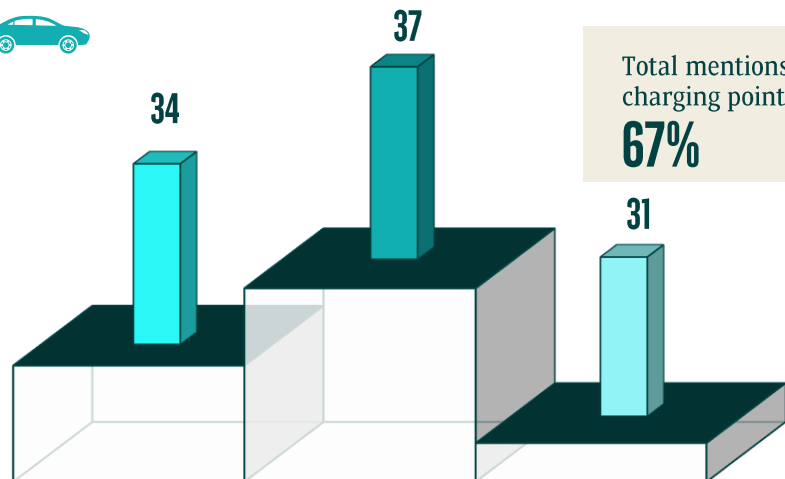
of the LCV fleet, overall, in 3 years is expected to be BEV.

The report highlights that the main obstacles to the wider adoption of electric vehicles are insufficient charging infrastructure and the higher purchase price compared to regular fuel cars. For both passenger cars and LCVs, **charging infrastructure remains the constraint the most mentioned**, whether at home, at company's premises or public charging (with **67% total mentions for passenger cars and 66% mentions infrastructure**).

CONSTRAINTS FOR USING ELECTRIC PASSENGER CARS

For passengers cars in 2025
In %

-  Not enough public charging points
-  The purchase price is higher than a regular fuel car
-  No charging points at your company offices

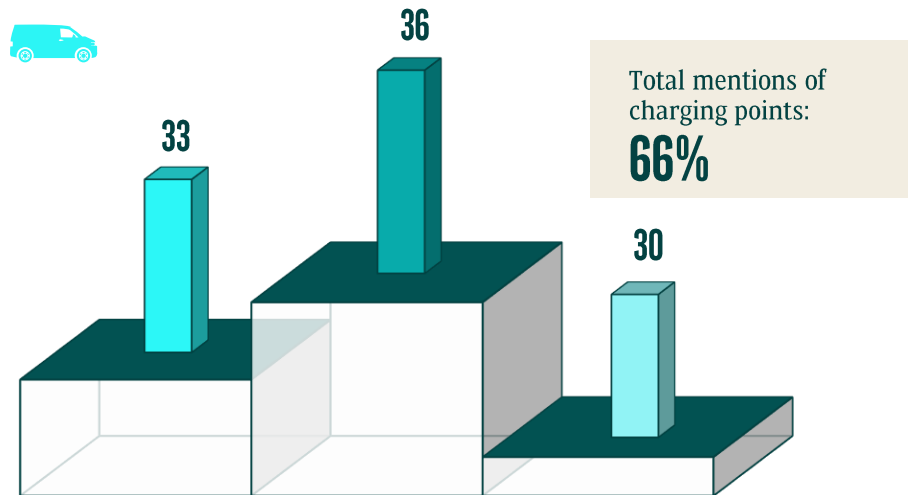


Total mentions of charging points:
67%

CONSTRAINTS FOR USING ELECTRIC LCV

For LCVs in 2025
In %

- Not enough public charging points
- The purchase price is higher than a regular fuel car
- No charging points at your company offices

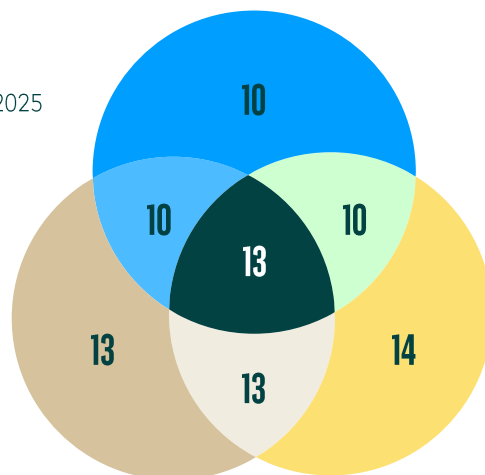


To address these issues, **companies are developing charging strategies**, including installing charging points at company premises and supporting home charging for employees. A new set of questions regarding charging policies implemented by companies reveal that **85% of the companies interviewed have a charging policy or plan to have one in the future**, whether it covers charging at employee's home or at the company's premises or using public networks. Looking more into detail and 12-month perspective, **55% of companies have already installed or plan to install charging points at their companies' premises and 50% support or plan to support their company car drivers for the installation of their home charging points** (with 98% of them totally or partially financially supporting this). **Visualization based on the following 3 graphs:**

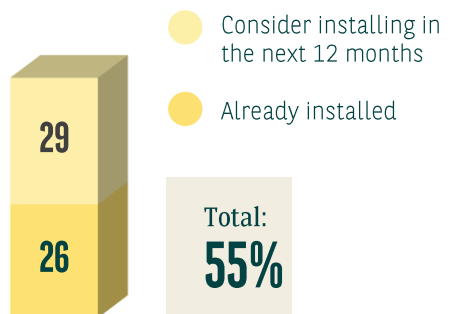
CHARGING STRATEGIES

For Passenger Cars & LCVs in 2025
In %, for all countries

- Charging at home
- Public charging
- Charging at the company's premises



Installation of charging points at company's premises (in %)

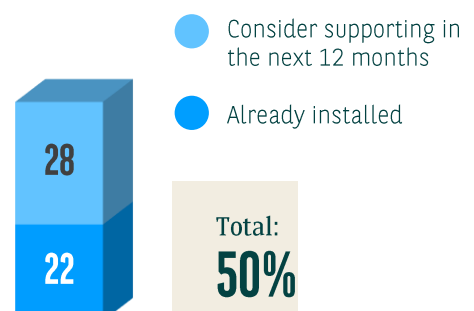


At least one charging strategy:
85%

None:
15%

The report additionally shows that **13% of companies have set targeted decarbonization goals**, with an additional 26% currently evaluating such goals. This growing awareness of corporate decarbonization underscores the importance of aligning fleet management practices with broader environmental objectives. **More than half of the companies with decarbonization goals (56%) consider that their employees mobility has a moderate to significant contribution to achieving these targets.**

Support of charging points installation at home (in %)



02/ COST EFFICIENCY REMAINS A TOP PRIORITY,

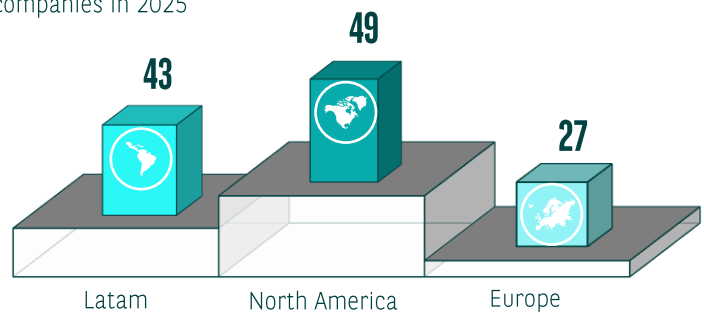
with 41% of companies already including second-hand vehicles in their fleets.

Another major challenge is mitigating the rising Total Cost of Ownership (TCO). After several years of inflation, managing costs has become a critical concern for fleet managers. The report indicates that **31% of companies view mitigating rising TCO as a major challenge.**

This concern is particularly pronounced in Latin America (43%) and North America (49%), where economic conditions have led to increased operational costs, while it remains important in Europe (27%) but to a much lesser degree compared to the other regions.

MITIGATING THE INCREASE OF TCO REGION COMPARISON

For companies in 2025
In %



To combat rising TCO, companies are exploring various financing methods. **Full-service leasing remains a popular option, with 27% of companies using it as their main financing method.** Furthermore, adoption of this financing method has a positive outlook, with 37% of companies intending to introduce or increase the use of this financing method in the next three years.

Another interesting finding of this year's Barometer is that **41% of companies are already including second-hand vehicles in their fleets** (vehicles that were not new when acquired by the company), with an additional 43% declaring the intention to do so in the next three years. These figures are very much consistent between the regions, although North America reports a higher use rate today (48%).

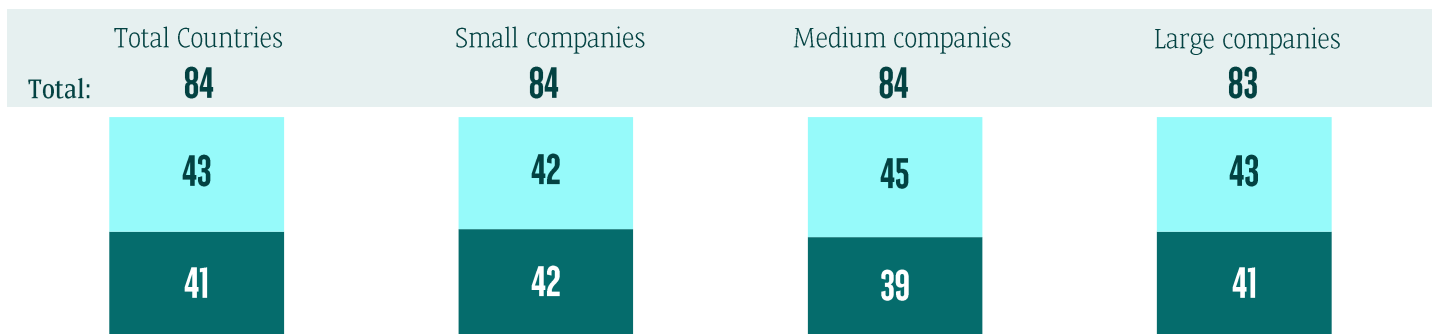
USED / SECOND-HAND VEHICLES POSSESSION

For companies in 2025
Passenger cars + LCVs in %

- Already including
- Consider including in the next 3 years

How to read the results?

84% of the companies, overall in 2025 are already including vehicles that were not new when acquired or are considering doing so in the next 3 years.



Despite the cost challenge, the report reveals that most companies remain optimistic about the future of their fleets. Overall, 91% of companies anticipate that their fleets will either remain stable or increase over the next three years, with 27% expecting growth. This optimism is driven primarily by business development and HR-related needs. The growth potential is particularly strong in North America and Europe, where companies are more likely to invest in fleet expansion.

03/ COMPANIES ARE REPOSITIONING THE EMPLOYEES IN THE CENTRE OF MOBILITY AND FLEET TRANSFORMATION,

45% of companies mentioning HR needs such as talent acquisition and employee retention as being the main reasons for developing employee mobility policies and solutions.

This year's Barometer showcases the employee's growing influence in the decision-making process of corporate mobility stakeholders.

32% of companies highlight promoting responsible driving as a main challenge, so there is a clear need to focus on driver behavior and safety. The use of telematics and connected vehicle technologies plays a significant role in addressing this challenge. The Barometer reveals that **40% of companies have adopted telematics tools**. Interestingly though, there seems to be a "say-do gap" when it comes to the use of data from telematics, with only **15% of fleet managers with connected cars using the data today, but an additional 47% declaring the intention to do so in the next three years**.

How to read the results?

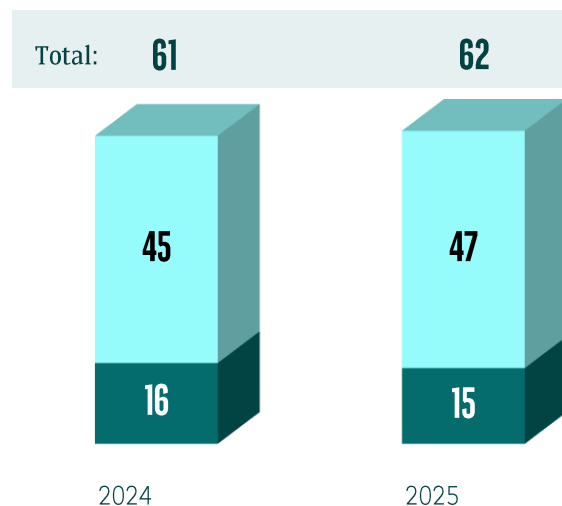
62%

of the companies with connected vehicles, overall in 2025, 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.

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

For all countries
In %

- Use
- Consider

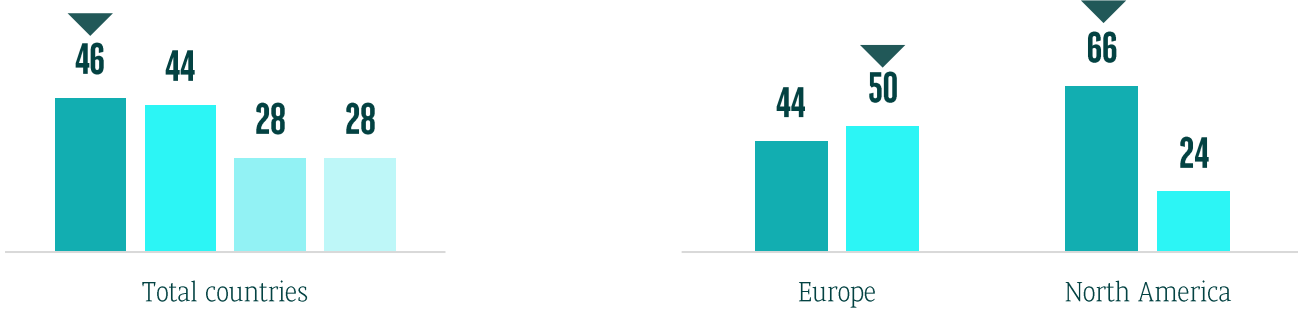


Telematics data is primarily used for vehicle security and geolocation (36%), improving driver behavior and safety (32%) and to improve operational efficiency (27%). By leveraging this data, companies can implement targeted strategies to promote safer driving practices, reduce accidents, and enhance overall fleet performance. This focus on responsible driving not only improves safety but also contributes to cost savings and environmental sustainability.

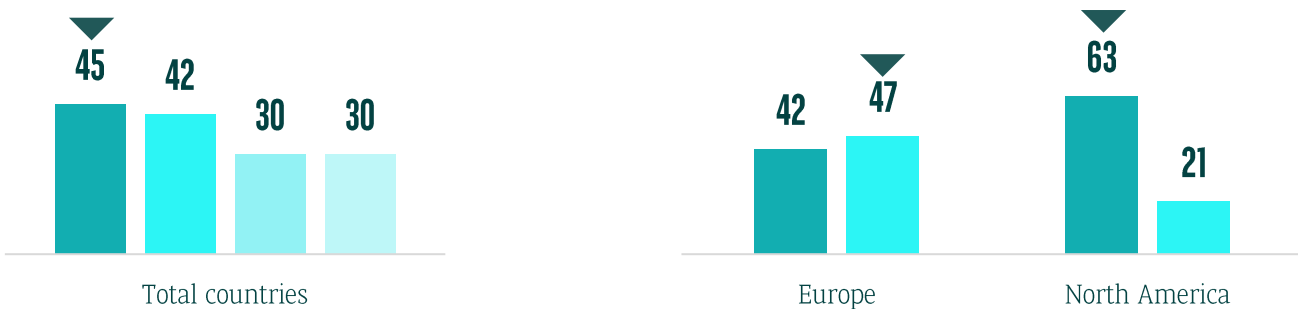
In addition to the challenges mentioned above, **embracing mobility solutions is becoming increasingly important for fleet and mobility stakeholders**, driven by HR-related needs, such as talent acquisition and employee retention (with at least 45% of respondents mentioning it). The mobility¹ policies and solutions² are seen also as a driver for environmental sustainability, especially in Europe where companies tend to prioritize CSR policies – considered as a lever for mobility policies implementation by 50% of companies in Europe and for mobility solutions by 47%.

TOP 3 REASONS FOR IMPLEMENTING MOBILITY POLICIES

For global + regional bench in 2025
In %



TOP 3 REASONS FOR IMPLEMENTING MOBILITY SOLUTIONS



- Because of HR related needs like talent recruitment
- For reasons related to CSR policies
- To anticipate upcoming regulations
- Because of tax benefits

How to read the results?

46% of the companies, overall in 2025 declare that the main reason for **introducing mobility policies** is: **Because of the HR related needs like talent recruitment.**

45% of the companies, overall in 2025, declare that the main reason for **introducing mobility solutions** is: **Because of the HR related needs like talent recruitment.**

Regarding the adoption rate, **mobility policies are being used or considered in the next three years by 79% of companies globally**, while **mobility solutions are being used or considered in the next three years by 60% of companies globally**, showing that solutions which require change management and investment from fleet and mobility stakeholders take longer to be implemented.

¹ The List of Mobility Policies tested in the Barometer 2025 was the following: Public transport expense reimbursement, Personal vehicle expense reimbursement, Mobility Budget, Private lease or salary sacrifice, A short or mid term rental vehicle, Car or cash allowance.

² The List of Mobility Solutions tested in the Barometer 2025 was the following: Car sharing, Ride Sharing, Bike Leasing, Bike Sharing, Scooter or Moto Leasing, An app provided by the company to book multiple mobility solutions, A card provided by the company to pay multiple mobility solution.

Within the range of mobility solutions we see that **car sharing** stands out as a popular option in both in usage and consideration (23%), and there is a clear interest in the development of bike **leasing** (while only 4% of companies declare using it today, 8% consider to do so in the next three years). When it comes to mobility policies, the most used ones are **public transport expense reimbursement** (20%), **car or cash allowance** (17%), and **short/mid-term rental vehicles** (17%).

MOBILITY SOLUTIONS & POLICIES IMPLEMENTATION PODIUM

For all countries in 2025, in %

Mobility policies

- Public transport expense reimbursement
- Car or cash allowance
- Mobility budget
- A short or mid-term rental vehicle

Mobility solutions

- Car sharing
- An app provided by the company to book multiple mobility solutions
- A card provided by the company to pay multiple mobility solutions
- Ride sharing

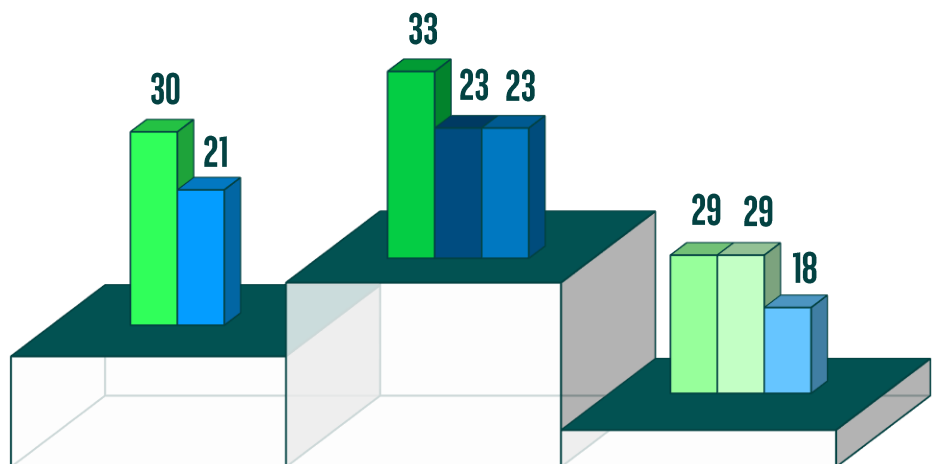
How to read the results?

33%

of the companies, overall in 2025, are already using Public transport expense reimbursement or are considering doing so in the next 3 years.

23%

of the companies, overall in 2025, are already using Car sharing or are considering doing so in the next 3 years.



At least one mobility policy:

79%

At least one mobility solution:

60%

Implementing mobility solutions not only addresses employee needs but also contributes to overall mobility efficiency and sustainability. By offering a variety of mobility options, companies can reduce their reliance on traditional company cars and promote more sustainable transportation practices.

CONCLUSION

The Arval Mobility Observatory's Fleet and Mobility Barometer 2025 underscores the critical need for a balanced approach to fleet and mobility management, addressing environmental, economic, and employee-related challenges. While the transition to electrified fleets faces obstacles such as charging infrastructure and purchase prices, these challenges also present opportunities for innovation and growth. Companies are developing charging strategies and exploring cost-efficient financing methods, such as full-service leasing and incorporating second-hand vehicles into their fleets. Additionally, the focus on employee mobility policies and solutions not only addresses HR needs but also contributes to overall fleet efficiency and sustainability. By leveraging telematics and connected vehicle technologies, companies can promote safer driving practices, reduce accidents, and enhance operational efficiency. Ultimately, the Barometer 2025 emphasizes that by transforming these challenges into catalysts for change, companies can successfully navigate the future of fleet and mobility management.



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You can **download** the full Global Fleet And Mobility Barometer Report 2025 here:

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METHODOLOGY

2024/2025

For this independent survey, 8 061 companies decisions maker interviews were carried out between August 26th 2024 and November 06th 2024 for 28 countries by an independent research company, Ipsos. Participants were recruited and interviewed by telephone. Its scope covers 28 countries: Austria, Germany, Belgium, Spain, France, Greece, Italy, Luxemburg, the Netherlands, Poland, Portugal, UK, Czech Republic, Slovakia, Romania, Switzerland, Finland, Denmark, Norway, Sweden, Mexico, Canada, North America, Turkey, Morocco, Chile, Peru and Brazil. The companies in scope operated at least one vehicle.

The distribution of the interviewees was as follows:

53%

were companies with 1 to 99 employees

27%

were companies with 100 to 249/499/999* employees

20%

were companies with 250/500/1000+* employees or more

*dependent on market

