GLOBAL FLEET SURVEY 2023

BENCHMARK YOUR GLOBAL FLEET STRATEGY

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Holman

Polestar
Global Fleet Survey 2023: steering into the future

The fleet industry stands at a pivotal juncture, shaped by technological evolution, environmental imperatives, and market dynamics. The Global Fleet Survey 2023 offers insights into this vibrant landscape, capturing the sentiments and strategies of fleet managers across the globe. Spanning various industries and regions, the survey paints a comprehensive picture of the challenges, opportunities, and innovations defining the sector's present and future trajectory.

Comprising over 80 detailed questions, the survey delves deep into critical areas: from company and respondent profiles to global strategies, financial frameworks, partnerships with car manufacturers, and the pressing narrative of sustainability.

A significant trend evident in the findings is the industry's steadfast move towards eco-friendly mobility, reflecting the global urgency to mitigate climate change. The survey also underscores Europe's influential role, both as a significant operational hub and a trendsetter.

In essence, the 2023 Global Fleet Survey serves as a compass for stakeholders, demonstrating the industry's current realities and indicating its future direction. As we unpack the insights and overarching themes of this research, we invite you to discover the evolving terrains of the global fleet sector.

Enjoy the reading of our comprehensive Global Fleet Survey.
Europe’s pioneering fleet evolution: leading the charge into a greener future

An in-depth analysis of Europe’s footprint in the 2023 Global Fleet Landscape, highlighting its vanguard position in technological advancements, diversification, and robust sustainability initiatives.

The Global Fleet Survey 2023 casts Europe in a commanding role within the dynamic global fleet industry. Dominating sectors like Pharma & Health Services with a 29.8% share, European companies are expansive, averaging around 35,675 employees. This scale is palpable in the fleet sector, as nations like Germany spearhead the passenger car segment, with the UK leading in light commercial vehicles. Europe’s push towards diversification is evident, with fleet managers increasingly collaborating with varied car brands.

Deep insights come from European respondents, predominantly from hubs like the Netherlands and Germany. Remarkably, 57% are rooted in the Procurement department, underscoring the deep integration of procurement with fleet management. The vast global responsibilities held by the majority further highlight Europe’s central role in global fleet orchestration.

Financially, Europe showcases a strong inclination towards full-service leasing, at 90.2%. Alongside this, there’s consistent unbundling of services such as fuel and insurance. Telematics, although brimming with potential, has room to grow. The evolving relationship with finance providers, hinting at a consolidation trend, marks Europe’s advancing maturity in fleet financing.

But Europe’s most salient narrative revolves around sustainability. The decline of Internal Combustion Engine vehicles contrasts starkly with the anticipated rise of Battery Electric Vehicles, with a remarkable 89.2% predicting growth. Europe’s aggressive CO₂ targets for the next decade mirror its determination for a cleaner future. This commitment extends to mobility, as 48.6% embrace micromobility and 62.2% allocate mobility budgets, majorly driven by sustainability imperatives.

In essence, Europe, as the frontrunner in fleet innovation, is both crafting and reacting to global changes, primarily leaning into sustainability and diversified mobility. As the global tapestry evolves, Europe’s current trajectory promises to mold the future blueprint of global fleet management.
North America’s fleet odyssey: steering towards a sustainable horizon

Delving into the 2023 Global Fleet Survey, North America emerges with unique trends, setting the compass for a diversified and eco-conscious fleet future.

The Global Fleet Survey 2023 has illuminated the unique characteristics of North America’s fleet industry. Within the IT & Technology sector, North American companies are notably prevalent, constituting 17% of the total. With an average employee count of 27,890.97, these firms prominently operate out of the USA, which alone hosts 28% of corporate headquarters. However, North America’s average fleet size, at 1,952.42 cars in 2023, showcases a slight decrease, emphasizing the need for efficient fleet management. This region’s emphasis on light commercial vehicles, with a tally of 90,960 units, further underscores its dependence on fleet transportation for diverse sectors.

A dive into respondent fleet profiles from North America reveals that a minority is based in the USA. The dominant department these participants hail from is Procurement, standing at a substantial 57%. A remarkable 78% of these respondents have responsibilities that span North America, suggesting the region’s substantial role in global fleet operations.

Shifting to fleet management, North American businesses in 2023 have exhibited increased unbundling trends, especially in services like insurance, fuel, and maintenance. The regional focus on sustainability becomes evident in vehicle choices. While ICE vehicles are projected to decrease by a significant 61.5%, there’s a balanced growth expectation for BEVs, with half anticipating an increase. The strong inclination towards sustainable vehicles is further cemented with North American firms targeting aggressive CO₂ caps, with a shift towards 1-60 g/km by 2030.

The mobility landscape in North America presents a mixed picture. Though micromobility and mobility budgets have gained traction, with 15.4% and 34.6% adoption respectively, there remains an unmet need in areas like carpooling and bike sharing. The primary driver for these mobility solutions remains sustainability, scoring an impressive 4.55 out of 5. However, challenges persist, particularly in terms of time restrictions and finding appropriate mobility solution providers.

In conclusion, North America’s 2023 fleet landscape underscores an evolving narrative. Sustainability has emerged as the region’s guiding star, shaping not just vehicle preferences but also mobility solutions. While challenges persist, the region’s proactive approach, marked by strategic shifts in fleet management and mobility, paves the way for a greener, more efficient future.
Navigating Latin America’s fleet evolution: a shift to green horizons

The 2023 Global Fleet Survey illuminates Latin America’s transformative journey towards sustainability and innovative mobility in the fleet industry.

In the vast landscape painted by the Global Fleet Survey 2023, Latin America emerges with unique and evolving fleet dynamics. The region’s companies, with an average employee count of around 8,215, maintain about 1,138 fleet cars, suggesting a car-to-staff ratio of roughly 0.21. Even with a Euro-centric approach to data collection, the survey indicates Latin America’s importance, especially with Brazil housing 5% of total passenger cars globally. Despite this, the fleet size in the region leans towards stabilization, with 71.4% expecting no change come 2023.

While Latin America witnesses dynamic fleet management strategies, a crucial emphasis is placed on sustainability. The region showcases a trend away from ICE vehicles, with 59.3% of fleets remaining static and 29.6% anticipating a decrease. However, the adoption of greener vehicles such as BEVs and HEV/MHEVs is on the rise. There is a promising shift in CO₂ caps, with 35.7% of fleets expected to target the strict 1-60 g/km emission range by 2030. The average CO₂ emission, intriguingly, stands at 139.73 g/km in 2023, reinforcing the need for continuous sustainable efforts.

In the realm of finance and leasing, Latin America exhibits a unique footprint. A 77.4% of respondents lean towards full-service leasing, suggesting a robust trust in financial partners. Argentina emerges as a hotspot in fleet management with 9.5% of managers looking to switch leasing partners in 2023. It’s evident that while some regional preferences hold strong, there’s also a willingness to explore and adapt, reflecting the dynamism of the Latin American market.

Mobility, an integral part of the future transport ecosystem, reveals Latin America’s focus on diversification and sustainability. Micromobility finds its place with 15.4% of managers incorporating it, and an impressive 38.5% have introduced mobility budgets. The adoption of such solutions is driven primarily by sustainability, as indicated by its top score of 4.55. However, the region faces challenges, chiefly time constraints and the lack of solution providers, emphasizing the need for more transparent information and streamlined processes.

As the globe hurtles towards an integrated and sustainable transport future, Latin America, with its unique fleet patterns and sustainability focus, promises to be an influential player in this transformation.
The Global Fleet Survey 2023 unveils the dynamic shift in the APAC fleet industry, highlighting a transition towards green practices and efficient mobility.

The Asia Pacific’s fleet landscape is undergoing a rapid transformation, as vividly portrayed in the Global Fleet Survey 2023. With the survey’s European bias, the data from the APAC region still surfaces with rich insights that capture the evolving dynamics of the fleet industry here.

From the organizational standpoint, companies in the APAC region, notably the IT & Technology sector, have been scaling up. The average company boasts around 17,223 employees, a testament to the region’s economic significance. As for fleet specifics, Japan emerges as a standout player in the APAC market, holding 4% representation in the passenger car segment. The car-to-staff ratio points towards a surge in efficiency, suggesting a probable adoption of alternate mobility solutions.

However, the story takes a compelling turn when sustainability is put into the spotlight. The region exhibits a robust move away from conventional ICE vehicles, with a forecasted 46.4% decrease by 2023. In contrast, the increasing numbers for BEV and HEV hint at a future that’s electric and eco-conscious. Furthermore, the lowering CO₂ caps, with 50% of companies aiming for a cap of 1-60 g/km by 2030, are indicative of a conscientious shift towards greener practices.

Yet, the journey towards a sustainable future isn’t without its challenges. On the mobility front, while 33.3% of respondents have already set a mobility budget, solutions like micromobility and carsharing are still gaining traction, with adoption at 18.5% and 3.7%, respectively. As urbanization in the APAC region advances, the importance of mobility solutions rises, primarily driven by sustainability goals. But, obstacles such as time restrictions and a lack of actionable information remain.

Finally, Asia is preparing for adjusted growth projections. This will impact the speed of growth, initially, and will reflect on investments and cost of funding. Ultimately, companies with fleets in the APAC region are predicted to become increasingly aware of risk factors, which will translate into a preference for OPEX rather than CAPEX, or, in other words a preference for leasing rather than purchase.

In conclusion, the APAC fleet landscape, with its nuances and trends, showcases a region in transition – moving from traditional practices, embracing sustainability, and looking forward to a future driven by efficient mobility solutions. As these transformations gain momentum, the APAC region stands poised to lead the fleet industry into a sustainable, efficient future.
The Ever-evolving Landscape of Fleet Management in Africa Middle East

The 2023 Global Fleet Survey reveals Africa Middle East as a region with its unique market dynamics, overshadowed by the dominant European scene, yet presenting a story worth telling. The average number of employees per company stands at 3,704, a testament to its distinct market size. Interestingly, the region witnessed a decline in fleet cars from 455 in 2021 to 328 in 2023, emphasizing a shift towards efficiency. Another highlight is Mozambique’s inclusion in top countries for Light Commercial Vehicles, pointing to dynamic vehicle preferences.

Diving into the profiles of fleet respondents, though Europe led with countries like the Netherlands and Germany, the Africa Middle East region still held significant ground with 63% regional responsibility. A testament to its strategic importance in the global fleet mosaic. When it comes to finance and leasing, full-service leasing stands out as the preferred option, with 57.6% favoring this approach. Interestingly, the region displayed a trend towards diversification in their financial partnerships, as evidenced by their increasing collaboration with finance providers.

Sustainability remains the centerpiece of the Africa Middle East fleet strategy. Traditional ICE vehicles are seeing a decline, with 29.6% of respondents predicting a decrease. However, the electrification trend is vibrant, with a promising 25.9% anticipating a rise in BEVs. The HEV and MHEV segments are also witnessing positive growth, emphasizing a broader shift towards eco-friendly alternatives. CO2 caps are also indicative of the region’s sustainable aspirations. By 2030, a majority are targeting the 1-60 g/km bracket, highlighting an aggressive push towards a greener future.

Lastly, on the mobility front, the region is gradually recognizing the importance of alternative mobility solutions. Micromobility and Mobility Budgets lead the way, with 14.8% and 33.3% adoption rates respectively. While challenges like time restrictions and lack of practical information persist, the primary driver towards these solutions remains sustainability, scoring a notable 4.55. This move reinforces the region’s commitment to not just adapt to global fleet trends but to actively contribute to shaping a sustainable future. In conclusion, the Africa Middle East region, with its unique challenges and market dynamics, remains a vital player in the global fleet narrative, particularly with its growing emphasis on sustainability.
Executive Summary

Company Profile
- Europe emerges as a powerhouse, leading in terms of employee counts, fleet cars, and other vehicle categories.
- The Pharma & Health, FMCG and IT & Technology sectors are the dominant industries.
- The USA is a significant player, particularly in fleet cars and light commercial vehicles, aligning with its vast employee base.
- A noteworthy decline in the car-to-staff ratio across regions indicates evolving dynamics, possibly hinting at operational efficiencies, reduced dependence on company cars, or emerging mobility alternatives.

Respondent Profile
- Survey participation is highest from the Netherlands and Germany.
- The Procurement department is the primary workplace for participants, followed by the Fleet department.
- Global responsibilities dominate, reflecting the increasing interconnectivity and universal strategies in fleet management.

Global Strategy
- The move to manage fleets from a global perspective is gathering momentum, particularly among larger enterprises, likely seeking operational uniformity and economies of scale.
- Sustainability continues to be a globally managed discipline, reflecting the worldwide commitment to eco-friendly practices.
- Regional or local management strategies for fleet operations underscore region-specific challenges and preferences.

Fleet Management
- Speed in vehicle delivery is paramount, indicating that fleet managers prioritize minimizing operational downtimes.
- There’s a tilt towards outsourcing certain functionalities, with larger fleets more inclined to adopt a hybrid management approach.
- Traditional tools like Excel maintain their popularity, suggesting that familiarity and versatility still play a significant role in decision-making.

Finance and Leasing
- Full service leasing shines as the preferred fleet finance approach, especially in regions like Europe.
- Open-end leasing finds traction in North America, but with inherent challenges.
- The growing emphasis on closed-end leasing transparency hints at the evolving needs and expectations of fleet managers.

Car Manufacturers
- Europe’s diverse brand engagement suggests a vibrant and competitive market.
- Brands focusing on electrification, such as Tesla and Kia, are capturing market share, challenging established giants.
- The selection criteria for car brands are increasingly holistic, balancing financial considerations with sustainability and safety imperatives.
**Sustainability**

- The fleet sector’s trajectory towards electrification is rapid and pronounced, promising a significant presence of Battery Electric Vehicles by 2025.
- The phasing out of Internal Combustion Engines, especially in Europe, marks a revolutionary change.
- The clamor for an extensive charging infrastructure reflects the logistical needs accompanying the shift towards electric vehicles.

**Mobility**

- The interest for Mobility and Mobility Budgets remains robust, especially in Europe, where the concept finds substantial favor.
- Traditional suppliers like leasing companies maintain their relevance, but there’s a discernible shift in expectations from ride-related services.
- Time constraints, the lack of providers, and the urgent need for actionable information emerge as significant hurdles. However, the driving force behind the industry’s move towards advanced mobility solutions remains sustainability, regulatory compliance, and employee benefits.

**Overall Summary**

The 2023 Global Fleet survey paints a picture of an industry in flux, navigating the challenges and opportunities of a rapidly changing landscape.

Europe’s dominant role, the global shift towards sustainability, and the evolving dynamics of finance and leasing are evident.

Traditional practices are being re-evaluated in the face of innovative solutions, and the entire sector seems poised on the cusp of a transformative era, steered by technological advancements, environmental considerations, and strategic global approaches.
A data driven future for transportation

The way we move goods and people has never been under closer scrutiny. Transportation now accounts for 25% of global carbon emissions, according to the United Nations Fact Sheet on Climate Change. We also continue to produce more and more vehicles each year which leads to increased congestion and pollution on the roads every day.

Improving and enhancing how vehicles move means understanding how they use our existing road network. For that we need data. Lots of it. At Geotab, we process more than 55 billion data points every single day as we monitor fleet movements around the world.

Analysing and understanding that data is a huge part of what we do. There is no point in generating data if we can’t interpret and measure it.

Well managed data intelligence empowers companies to navigate their futures more strategically. Trusted data is in increasingly high demand from fleet management teams. We need smart but simple tools to help us understand what our vehicles need at a micro level or at scale.

This year at Geotab, we introduced Project G, the first time we have adapted a Generative AI tool to understand plain English-language processes. It interprets and provides the speed of insights to make sense of data and provide the answers for effective decision-making. What used to require a dashboard to interpret data now just takes a matter of seconds.

Fleet managers only need to ask simple questions of their data: ‘Which vehicle breaks down the most?’ or ‘Which vehicles in my fleet can transition to electric?’ Comparative information is generated from vehicles across a customers’ fleet.

Edward Kulperger
Senior Vice President, Europe
Geotab
These simple AI commands will provide better visibility for customers to enhance their fleet operations. Improved access to data and integration using AI tools will also amplify value across the fleet.

Trusted data is a differentiating factor for success and also helps build the knowledge needed to transfer to an electric vehicle (EV) fleet. Getting data quality right allows companies to build for tomorrow.

The increased demand for Environmental, Social and Governance (ESG) reporting standards across Europe means they must also know their fleet’s carbon emissions. That will only increase the demand for EVs as we move towards a carbon-neutral future.

With stricter climate mandates, transparent and accountable reporting will be critical to demonstrate progress. The confidence of decision-makers will build through data-driven insights that empower fleets to measure, act upon, and scale efforts to reduce emissions.

Intelligent data is also vital for decision makers in order to make the right planning choices for the next generation charging infrastructure. Placing the right EV chargers at the right location is essential to allocate resources efficiently. As battery innovations increase, so do the charging solutions - with 5-minute charge, battery swapping and off-street charging all coming together.

Ultimately, we also look to a future where fleet efficiency and reduced emissions can be driven into most fleets. But without data, we’ll never turn the key to a new sustainable motoring future.

Learn more here: [www.geotab.com](http://www.geotab.com)
An essential guide for fleet success

How do you buy, drive, service and sell your fleet? In Fleet by the Numbers 2023, Holman gives you the answers, based on decades of fleet management experience and boiled down to the essentials. With an extra chapter on EVs.

“Holman Fleet by the Numbers is a collection of our industry perspectives and advice regarding the most pertinent trends and obstacles affecting all areas of the fleet industry. This guide walks you through ways to enhance the fleet experience at each stage of the vehicle lifecycle of buy, drive, service, and sell.”

The guide is especially useful for North American fleets, but much of the advice – and the numbers – are pretty universal.

For instance, this interesting factoid: Ukraine supplies 70-80% of the world’s neon, and Russia produces 35-40% of the world’s palladium. Both materials are essential for the production of semiconductors. The disruption caused by the Ukraine War thus explains the ongoing supply crisis.

Among the stats in the chapter on driving, these two stand out: vehicles without integrated safety tech have 13% higher claims, and a 15% higher rate of severe injury or death.

With the average vehicle age up two months over last year and inflation pushing up the price of parts, service and maintenance becomes critical. In this chapter, Holman reveals that 25% of one customer’s maintenance spend was down to idling.
In the chapter on EVs (and other alt-fuel vehicles), the guide points to a paradox in EV maintenance: the average cost for EV maintenance is half that of conventional vehicles (2025 projection), but accident repair can be more costly, due to more tech and more expensive materials used.

Holman’s Fleet by the Numbers 2023 is a succinct but useful checklist for anyone managing a vehicle fleet. By limiting itself to the essentials, it focuses on the things that are often easiest overlooked.

“Right now, we’re in a time of significant changes in the automotive industry. Emphasis is heightened on supply chains, technology, regulations, innovations, and more. This is where Holman’s consulting services thrive. Our teams are listening, watching, and developing best practices for fleet operators to sustain momentum regardless of these challenges.”

Download the e-book here:
www.holman.com/resources/ebook
The Polestar evolution continues

Polestar is driving the future of electric mobility, advancing at an exceptional pace, introducing a new model every year until (at least) 2025. However, the core is still the same: Pure progressive performance, designed with minimalism and close attention to detail.

In early 2024, the SUV for the electric age, the Polestar 3, will hit the roads, followed by the SUV coupé, the Polestar 4, to make its European debut. At the same time, the brand’s first production EV, the Polestar 2, continues to update year after year. And it’s not a race to keep up with the high pace and new models, but rather to pave the way and enable the evolution. The electric performance fastback embodies what Polestar, as a brand, is all about, and the latest update is the most significant to date.

The updated Polestar 2
The updates have already received approving responses and reviews across European markets, where increased range and power make it an even more thrilling car to drive. The shift from front to rear-wheel drive in Single motor versions enhances the dynamics and overall experience, something that the Long range Dual motor also takes advantage of. Placing the primary driving source on the rear wheels conveys more efficiency and higher torque. The maximum power is 350kW (476 hp) and torque up to 740 Nm. New battery upgrades have improved range and charging times, with up to 82 kWh capacity and 655 km (WLTP) on a single charge.
Always connected
As the first car in the world with an infotainment system powered by Android, Polestar 2 gives access to Google Assistant, Google Maps and Google Play Store, runs native apps that effortlessly integrate with the infotainment system and adds new dimensions to how everyday life and drives should be. Navigate, stream music or ask Google about the way, the latest news, or the weather at the destination. Regular remote over-the-air (OTA) updates bring new features and functionality to the Polestar 2 system, ensuring the latest software and features are available.

From breathing to seeing
The new Polestar 2 front includes the SmartZone. It replaces the former grid, aligns with Polestar 3, and marks the movement from the grill in traditional vehicles. In other words, the transition from breathing to seeing in the electric age. Here, Polestar integrates sensor technology, including the 360° camera and the radar sensor, enabling better safety and driving attributes.

Better business with an electric fleet
Transitioning to an electric fleet is a big step towards an efficient and environmentally responsible future. With Polestar, reducing costs and climate impact is done without compromises. The updated Polestar 2 offers a seamless blend of sustainability and luxury and is currently available for test drives and fleet orders with short delivery times.

Learn more [here](#) and start the conversation at [globalfleet@polestar.com](mailto:globalfleet@polestar.com)
Profile companies

General Insights
European companies have the most substantial presence in terms of employees, fleet cars, light commercial vehicles, and heavy-duty trucks. Companies are largely from the Pharma & Health and IT & Technology sectors.

The USA is a significant player in fleet cars and light commercial vehicles, aligning with the fact that it has the second-highest employee count. The car-to-staff ratio has been declining across all regions, indicating possible efficiency improvements, reduced dependency on company cars, or other underlying trends not visible from the provided data.

1. Sectors They Are Active In
   - The majority of companies are in the Pharma & Health Services sector (29.8%), followed by IT & Technology (17%), and Other (17%).
   - Engineering & Manufacturing and Services both are at 10.6%.
   - Consumer Goods and Automotive sectors have lower representation.

2. Employee Count by Region
   - Companies from Europe have the highest employee count with over 4.6 million, followed by North America and Asia Pacific.

3. Latin America and Africa Middle East regions have significantly fewer employees. Headquarters Location
   - The USA has the highest number of companies headquartered, followed by Switzerland and the UK.

4. Fleet Cars Count
   - Europe dominates with over 596,000 fleet cars, North America, and Asia Pacific following behind.
   - The total number of fleet cars among all companies is over 1 million.

5. Car-to-Staff Ratio
   - For the participating fleet managers, Latin America has the highest car-to-staff ratio, followed by Europe.
   - There’s a decline in the car-to-staff ratio in all regions from 2021 to 2023, with Africa Middle East showing the most significant drop.

6. Light Commercial Vehicles Count
   - There’s a significant number of light commercial vehicles in Europe and North America, with Europe leading.
   - The total count of light commercial vehicles has undergone changes, as indicated in the data.

7. Top Countries for Passenger Cars
   - Germany, the USA, and France are the top 3 countries with the highest number of passenger cars.
   - The spread is wide, with many countries having a representation but in smaller counts.

8. Top Countries for Light Commercial Vehicles
   - The UK and USA tie for the highest count, with France and Germany following.
   - Similar to passenger cars, there’s a diverse representation of countries.
Which sector is your company active in?

- Pharma & Health Services: 30%
- IT & Technology: 17%
- Engineering & Manufacturing: 11%
- Services: 11%
- Consumer Goods: 9%
- Automotive: 6%
- Other: 17%

Other sectors: Agrochemical, Consultancy, Distribution & Logistics, Food & beverages, Oil and Gas, Postal Company
How many employees does your company have?
Where are your company’s headquarters located?
What is the total number of fleet cars in your company?

**TOTAL**

1,024,140

**AVERAGE**

7,263
What is the total number of fleet cars in your company?

**TOTAL**

- Europe: 596,088
- North America: 181,575
- Latin America: 105,852
- Asia Pacific: 111,093
- Africa Middle East: 29,532
- Total: 1,024,140

**AVERAGE**

- Europe: 4,519
- North America: 1,952
- Latin America: 1,138
- Asia Pacific: 1,058
- Africa Middle East: 320
- Total: 7,263
What is the total number of Light Commercial Vehicles (up to 3,5 t) in your company’s fleet, per region?
What is the penetration of company cars in your company (car-to-staff ratio) in the specific regions?
What is the total number of Light Commercial Vehicles (up to 3.5 t) in your company’s fleet, per region?
What are the top 3 countries with the highest number of fleet cars?
What are the top 3 countries with the highest number of Light Commercial Vehicles (Up to 3.5t)?
Profile respondents

1. Participants’ Location
- Netherlands is the most represented country, with 21.3% of participants.
- Germany is the second most common location, with 12.8%.
- France, Switzerland, Poland, and Portugal each have around 6-8% representation.

2. Department of Work
- Most participants work in the Procurement department, representing 57.4%.
- The Fleet department is the next most common, with 23.4% of participants.
- HR and Finance have modest representation with around 4-6%.
- Other, Facilities, Health & Safety, and Mobility each represent the least, with 2.1%.

3. Scope of Responsibility
- A majority of the participants (57.4%) have a Global scope of responsibility.
- 38.3% have a Regional scope.
- Only a small fraction, 4.3%, have a National scope.

General Insights
The Global Fleet survey results, based on the provided data, reveal that:
- Most participants are from the Netherlands and Germany.
- A significant majority of participants work in the Procurement department, followed by those in the Fleet department.
- In terms of responsibility, most participants operate at a global level.
In which country are you located?

- Netherlands: 21%
- Germany: 13%
- France: 9%
- Switzerland: 9%
- Portugal: 6%
- Poland: 6%
- UK: 4%
- India: 4%
- Spain: 4%
- Malaysia: 4%
- Belgium: 4%
- Italy: 2%
- Albania: 2%
- Ireland: 2%
- Argentina: 2%
- USA: 2%
- Serbia: 2%
- Finland: 2%

What department do you work for?

- Procurement: 57%
- Fleet: 23%
- HR: 6%
- Finance: 4%
- Mobility: 2%
- Health & Safety: 2%
- Facilities: 2%
- Other: 2%
What is the scope of your responsibility?

Regional: 38%
National: 4%
Global: 58%

Which regions are you responsible for?

- Europe: 100%
- North America: 78%
- Latin America: 67%
- Asia Pacific: 81%
- Africa Middle East: 63%
1. Global Fleet Management Perspective
A significant portion of fleet managers, approximately 59.6%, have transitioned to a global perspective when managing their fleets. This trend isn’t isolated either – about 27.7% are considering a shift towards this model. Interestingly, a closer look at the data reveals that those who manage with a global perspective tend to oversee larger operations, both in terms of the number of employees and vehicles. This suggests that a global approach might be favored by larger enterprises, which are possibly looking for uniformity and economies of scale.

2. Size of Global Fleet Team
A company’s size, especially its employee count, appears to be a good predictor of the size of its Global Fleet Team. Large-scale companies, those boasting over 100,000 employees, typically maintain robust fleet teams with an average of around 9.27 Full-Time Equivalents (FTEs). However, the variability in team sizes, especially in mid-sized companies, reflects that there isn’t a one-size-fits-all approach. Different companies, even of similar sizes, might have divergent strategies and needs.

3. Reasons for Global Fleet Management in 2023
As global concerns about environmental sustainability intensify, it’s no surprise that sustainability tops the list of reasons for a global fleet management approach. Coupled with this is the emphasis on process harmonization and best practice sharing. Both reflect the need for standardized, efficient practices across geographies, especially in larger fleets where complexity can be a major challenge.

4. Internal Obstacles Over the Years
The journey from 2019 to 2023 has not been smooth sailing for fleet managers. They’ve reported an escalating complexity in processes, creating challenges in managing fleets on a global scale. Additionally, issues such as a lack of transparent data and the concern over budgets have persisted. On a positive note, concerns about a lack of expertise have seen a decline, suggesting that availability of information and more insight might be effectively addressing this gap.

5. External Challenges Over Time
Looking externally, the period from 2019 to 2023 highlighted some clear challenges for the fleet industry. Notably, the lack of consistent global leasing offers stood out as a significant pain point. Additionally, as the industry evolves and becomes more complex, fleet managers are feeling the strain of an information gap. Both these challenges have grown more pronounced over the years, signalling a pressing need for solutions.

6. Fleet Management Priorities for 2023
The year 2023 seems to be setting a clear direction for fleet management. Sustainability, particularly the shift towards greener fuel options like electric and alternative fuels, is the North Star. This aligns with global trends and pressures, emphasizing the fleet industry’s role in mitigating environmental impacts. Additionally, automation and technological integration are gaining traction, reflecting the broader technological advancements and the drive for efficiency.
Do you manage your fleet with a global perspective?
How many people (FTE’s) are part of the Global Fleet Team?

![Bar chart showing the number of people (FTE’s) in the Global Fleet Team across different company employee number ranges.](image-url)
Which department(s) is leading the global team?

- Procurement: 72%
- Fleet: 26%
- HR: 21%
- Mobility: 11%
- Finance: 9%
- Sustainability: 4%
- Others: 9%
How are vehicle fleet management disciplines steered?
How are the following aspects managed?
What are the main reasons to manage a fleet globally in 2023?
What are the main INTERNAL obstacles/challenges to manage a fleet globally in 2023?
What are the main INTERNAL obstacles/challenges to manage a fleet globally?
Would you deviate from a centralised (global or regional) approach

36%

No, I would not because:

Process Efficiency and Standardization
Centralized management promotes uniformity in procedures and allows for easier compliance and reporting. Standardization also makes monitoring costs simpler and more effective.

Scale and Complexity
Managing operations on a global scale is already complex and resources are not available to manage specific country setups. Decentralizing would further complicate this, making it more difficult to achieve a cohesive strategy.

Strategic Alignment
A centralized approach is more in line with broader company objectives and strategy, including aspects beyond just cost-saving, such as environmental accountability and stakeholder trust.

64%

Yes, I would if:

Cost Efficiency and Long-Term Savings:
Many responses highlighted that local approaches could generate significant cost savings. These cost savings were often mentioned as long-term, sustainable, and in line with extra financial criteria. This aligns with better control over costs and increased transparency.

Local Expertise and Flexibility:
A frequently mentioned advantage was that local management often has better knowledge of the local market conditions, enabling more aligned and substantial savings compared to a global approach. The flexibility that comes from local expertise also allows for more tailored strategies that can better meet regional or country-specific needs.

Alignment with Governance and Sustainability Goals:
Several responses noted that local approaches are not only compliant with global procurement rules, such as ESG and CSR plans, but also do not compromise on service quality or safety. Additionally, these local strategies do not hinder sustainability goals and are in line with the global ESG mission of the company.
What are the main EXTERNAL obstacles/challenges to manage a fleet globally in 2023?
What are the main EXTERNAL obstacles/challenges to manage a fleet globally?

[Bar chart showing the levels of concern for different obstacles over years 2019 to 2023]
What are the most important fleet management aspects you need to solve in 2023?
What are the most important fleet management aspects you need to solve in 2023?

**Criteria Ratings**

**Fuel Management Paramount**
Irrespective of fleet size, there’s a significant emphasis on managing carbon output through Electric and alternative fuels. This is in line with global sustainability trends and the push for greener solutions.

**Automation Gains Traction**
As technology evolves, the importance of automating business processes, potentially including third-party software and telematics, is gaining traction.

**Differing Views on Acquisition**
The more significant variability in views on Acquisition suggests that this aspect may be influenced by other factors, such as company-specific goals, regional market conditions, or previous acquisition strategies.

**Size Not a Prime Concern**
For both fleet sizes, deciding the number and type of vehicles needed for business growth is not as critical as the other aspects. This might suggest that many fleets have already reached an optimal size or other factors like sustainability and automation are overshadowing size concerns.

In conclusion, as fleet management moves into 2023, the focus is on adopting sustainable fuel options, integrating automation into processes, and ensuring driver safety. While acquisition strategies and fleet sizes remain important, they’re somewhat secondary to the core concerns of sustainability, automation, and safety.
What are the most important fleet management aspects you need to solve? The transition from 2019 to 2023
What are the most important fleet management aspects you need to solve?
The transition from 2019 to 2023

**Insight**

**Sustainability is Paramount**
Fuel Type has seen the most consistent rise in importance over the years. This implies that managing carbon output and transitioning to more sustainable fuel options, such as electric or alternative fuels, has become a central focus. This is likely influenced by global sustainability trends, regulatory pressures, and the increasing availability and viability of electric and alternative fuel vehicles.

**Decline in Emphasis on Fleet Size**
Over the years, there’s been a declining trend in the importance given to fleet size. This suggests that while it was a notable concern in 2019, other factors, such as sustainability and automation, have overshadowed size concerns by 2023.

**Rising and Falling Acquisition Concerns**
Acquisition saw an increase in importance from 2019 to 2022, suggesting a growing concern about how to effectively acquire and manage fleet vehicles. However, the slight dip in 2023 might indicate some resolution or changing priorities in this area.

**Stable Concern for Driver Safety**
EHS has remained relatively stable throughout the years. This consistency underscores the continuous importance of driver safety in fleet management.

**Automation’s Varied Importance**
Automation had a rising trend initially but has seen some fluctuations. As technology evolves, automating business processes is important, but the exact priority might vary based on other emerging industry challenges or available solutions.

In conclusion, from 2019 to 2023, fleet managers’ priorities have shifted towards sustainability, emphasizing the need for managing carbon output through greener fuel options. While concerns like fleet size and acquisition methods have seen fluctuations in importance, the safety of drivers has remained a consistent priority. Automation’s changing importance underscores a dynamic fleet industry adapting to evolving technological capabilities and challenges.
1. **Prompt Vehicle Delivery**
Efficiency in vehicle delivery is of paramount importance in the current fleet management landscape. A 98% of fleet managers are in favor of a vehicle delivery window of under 6 months, emphasizing the significance of speed in maintaining fleet operations.

Notably, this preference for rapid delivery extends to vendor selection. Companies that can guarantee swift deliveries, thereby minimizing downtime, are poised to have a distinct competitive advantage in the marketplace.

2. **Outsourcing Trends**
The approach to fleet management in 2023 seems to be undergoing a discernible shift, with an increasing emphasis on leveraging the expertise of external entities. Rather than opting for a complete in-house strategy, there’s a pronounced tilt towards a hybrid model, where certain functions are outsourced, while core functions are retained internally.

This trend is especially pronounced for larger fleets, possibly due to the intrinsic complexities and challenges of managing extensive vehicle pools. Yet, a consistent section of the industry, ranging between 27-31% of managers, is choosing to navigate the full outsourcing route.

3. **Fleet Management Tools**
Over the period from 2019 to 2023, the tools and services utilized in fleet management have shown considerable dynamism. Despite the burgeoning external solutions, traditional tools such as Excel and Access have held their ground.

Their versatility, combined with familiarity, possibly explains their sustained popularity. Simultaneously, the declining use of company-specific tools suggests a recognition that more standardized, possibly external, solutions may offer enhanced efficiencies or cost advantages.

4. **Independent Fleet Consultants:**
The years following 2019 saw a dip in the inclination towards employing independent fleet consultants.

This shift may suggest that fleet managers who were initially curious have either experimented with consultants and formed an opinion or the broader industry perception of consultants has evolved. It highlights an industry in flux, where established norms are being revisited and strategies recalibrated.
5. Unbundling Services by Region:
The way fleet services are unbundled shows fascinating regional variations, painting a picture of how global market conditions, regional preferences, and unique logistical challenges mold fleet management strategies.

For instance, while North America gives primacy to comprehensive global or regional reporting, Europe’s stable unbundling patterns hint at a mature, settled market.

6. Savings Targets and Sources:
There’s a clear downtrend in the savings targets set by fleet managers from 2020 to 2023. This trend could be a result of already implemented cost-controlling measures or altered economic realities. Interestingly, when it comes to the sources of these anticipated savings, engagements with OEMs and Leasing Vendors stand out.

It underscores the idea that there’s still considerable room for financial optimizations in these engagements.

7. Telematics in Fleet Management:
Despite the vast array of benefits, telematics promises—from safety enhancements to operational efficiencies—the global adoption rate in fleet management remains lukewarm.

This suggests potential barriers, possibly related to costs, complexities, or the perceived return on investment. Yet, for those who adopt, the emphasis is unmistakably on leveraging telematics data for safety improvements, underscoring the industry-wide commitment to minimizing risks.

In a nutshell
As we move through 2023, the global fleet management sector is characterized by its emphasis on swift vehicle deliveries, an evolving stance on outsourcing, adaptability in tool selection, region-specific unbundling patterns, and a nuanced approach to technology adoption. The focus on safety, efficiency, and cost optimization remains undiminished, reflecting the core tenets of modern fleet management.
What do you consider an acceptable vehicle delivery time?

- Under 6 months is acceptable: 98%
- 6-12 months is acceptable: 40%
- Over 12 months is acceptable: 0%

I choose the OEM that can deliver cars the fastest: 10.6%
What do you consider an acceptable vehicle delivery time?

**Insight**

**Prompt Delivery is Crucial**
Almost all fleet managers (98%) expect or prefer their vehicles to be delivered in under 6 months. This suggests that efficiency and speed are paramount in the fleet management industry.

**Flexibility Exists but Has Limits**
While a sizable portion (34%) of fleet managers are willing to wait 6-12 months for vehicle delivery, there’s an absolute consensus against waiting for over a year. This boundary indicates that while there’s some flexibility in delivery expectations, fleet operations likely cannot sustain prolonged delivery times.

**Delivery Speed Influences Vendor Choice**
For 11% of the managers, delivery speed is a critical determinant in choosing a vendor or OEM. This implies that OEMs and vendors that can guarantee quicker deliveries might have a competitive advantage in securing contracts with these fleet managers.

In conclusion, timely vehicle delivery is a significant concern in fleet management as of 2023. While there’s some tolerance for moderate delays, excessive delivery times are universally unpopular. This emphasis on promptness highlights the operational needs and efficiencies sought in fleet management.
Do you outsource or are you planning to outsource your fleet management activities in 2023?

![Pie chart and bar charts showing the percentage of organizations planning to outsource fleet management activities.](image-url)
What tools or support do you use to manage your fleet? The transition from 2019 to 2023

- I fully rely on the leasing provider: 61% (2020), 41% (2021), 50% (2022), 55% (2023)
- I use my own tools (XL, Access, ...): 48% (2020), 54% (2021), 61% (2022), 57% (2023)
- My company has developed a tool to manage the cars: 28% (2020), 17% (2021), 17% (2022), 16% (2023)
- I use an external vendor: 25% (2020), 30% (2021), 45% (2022), 57% (2023)
- I use Fleet Software: 14% (2020), 29% (2021), 22% (2022), 16% (2023)
What tools or support do you use to manage your fleet?  
The transition from 2019 to 2023

**Insight**

**Growing External Reliance**
The increased reliance on external vendors in 2023 highlights a shift towards more specialized and perhaps sophisticated solutions in fleet management.

**Steadfast Own Tools**
Despite the availability of various tools and services, a significant number of fleet managers continue to rely on their own tools like Excel and Access. This reflects the adaptability and versatility of these tools.

**Declining Proprietary Tools**
The consistent decline in using company-developed tools might indicate a shift in corporate priorities or an acknowledgment that available external solutions are more efficient or cost-effective.

**Leasing Providers as Key Partners**
The resurgence in reliance on leasing providers in 2023 after a dip in 2021 suggests that they remain integral to the fleet management ecosystem, possibly offering more comprehensive solutions or better integrations.

**Fleet Software’s Varied Appeal**
While specialized fleet software might appeal to some managers, its declining use suggests that it might not be the one-size-fits-all solution for the diverse needs of the fleet management community.

In conclusion, between 2020 and 2023, fleet managers have exhibited a dynamic approach to tool and service selection, continuously adapting to the evolving needs and complexities of fleet management. While they remain open to external expertise and solutions, traditional tools like Excel and Access continue to be mainstays in the industry.
Did you unbundle services from your leasing contract?
The comparison among 2021 - 2023
What are your savings targets, if any, in 2023 (% on total spend)?

**Requirement**

- **Yes**: 57%, 65%, 68%, 54%, 53%
- **No**: 43%, 35%, 32%, 46%, 47%

**How much (%)**

- Europe: 4.3%
- North America: 3.5%
- Latin America: 4.3%
- Asia Pacific: 3.9%
- Africa Middle East: 3.9%
What are your savings targets, if any, in 2023 (% on total spend)?
The comparison from 2020 to 2023

How much (%)

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</table>
What is your preferred telematics solution? Comparison between 2022 and 2023

- Vehicle manufacturer integrated solution: 20% in 2022, 32% in 2023
- Leasing company/fleet management offered solution: 31% in 2022, 16% in 2023
- Third-party solution: 49% in 2022, 51% in 2023
If you use telematics, what would you find the most useful use of the data that it provided?
If you use telematics, what would you find the most useful use of the data that it provided?

**Insight**

**Safety First**
The overwhelming preference for using telematics data to improve driver behaviour and safety reinforces the notion that for fleet managers, safety remains paramount. This highlights the value of telematics systems in not just monitoring, but also actively enhancing fleet safety.

**Cost-saving Opportunities**
The emphasis on reducing fuel consumption signifies that fleet managers are always looking for ways to cut costs, and with fuel being one of the most significant operational costs, it’s an area ripe for optimization through telematics.

**Operational Efficiencies Matter**
A significant portion of fleet managers value the operational efficiencies that telematics can bring about. As fleets grow and become more complex, streamlining operations through data-driven insights can be invaluable.

**Specialized Systems**
The relatively lower emphasis on maintenance scheduling and logistics coordination might suggest that these areas are handled by other specialized tools or that the current telematics solutions don’t provide as much value in these specific areas.

In summary, while telematics serves multiple purposes, it’s clear that safety, cost savings, and operational efficiencies are at the forefront of fleet managers’ minds when considering the value derived from telematics data.
Are you considering a keyless solution as part of your fleet management?

**Early Adoption Phase**
The data suggests that the fleet management industry is in the early adoption phase concerning keyless solutions. While a few are already seeing its potential benefits or actively considering it, the majority are either skeptical or not considering it at all.

**Technology Maturity Concerns**
The skepticism about the readiness of keyless technology suggests that vendors need to address potential concerns around the robustness, security, and reliability of these solutions to gain more traction in the fleet management market.

**Education and Demonstration**
To shift the balance of opinion, there might be a need for more educational initiatives, demonstrations, and case studies that highlight the benefits and address the concerns of keyless solutions in fleet management.

In summary, while there’s an evident curiosity and early adoption of keyless solutions in fleet management, there’s also significant reluctance. Vendors and proponents of the technology may need to invest in education, outreach, and addressing concerns to accelerate its adoption in the fleet management sector.
Do you use cameras as part of your integrated telematics solution?

**Early Adoption Stage**
Similar to the keyless solution from the previous question, the industry seems to be in the early adoption phase concerning integrated camera-based telematics. Few have fully integrated systems, and most are still in the evaluation or disinterest phases.

**Potential Barriers**
The large number of respondents with no plans for camera implementation indicates potential barriers. These could include concerns about driver privacy, cost implications, data management complexities, or perceived lack of added value from such systems.

**Need for Demonstrable Benefits**
Vendors and proponents of camera-based telematics solutions might need to better showcase the tangible benefits of such systems – especially in terms of safety improvements, cost savings from incident reductions, and potential insurance benefits.

In summary, while there’s a slight movement towards the adoption of camera-based telematics systems in fleet management, there’s still a prevailing reluctance. Convincing demonstrations of the benefits and successful case studies might be needed to tip the balance in favor of wider adoption.
1. Preference for Full Service Leasing
Overall, the appeal of “Full service leasing” is evident with it emerging as the most favored fleet finance solution, especially in regions like Europe, Latin America, and Asia Pacific. This consistent adoption indicates that there’s a significant global lean towards a simplified and reduced-risk approach in fleet finance.

Despite this overarching trend, unique regional preferences, such as North America’s inclination towards “Finance leasing” and the Middle East and Africa’s preference for outright purchasing, emphasize that while overarching global trends play a part, specific regional factors still deeply influence decision-making.

2. Open-End Leasing
Open-end leasing finds more acceptance in North America, excluding the US, suggesting that this region finds a particular compatibility with this finance method, perhaps influenced by specific local market dynamics or regulatory guidelines.

However, despite this rising interest, there are inherent challenges, most notably the absence of clear benchmarks for return on investment and managing residual value risks, that act as barriers to its broader adoption.

3. Closed-End Leasing Challenges
While closed-end leasing comes with its own set of challenges, its widespread utilization highlights that its advantages often overshadow its limitations for most fleet managers. Predominant concerns encompass unpredictability in costs, and there’s a clarion call from fleet managers for more transparent pricing structures.

Moreover, the desire to participate in remarketing profits underscores the growing demand for more transparent, flexible, and equitable leasing solutions.

4. Dynamics of Leasing Partnerships
A significant portion of fleet managers showcases satisfaction with their current leasing relationships, emphasizing a general contentment with existing partnerships.

Yet, the shifting dynamics in countries such as the Netherlands and Ireland, where there’s an increasing trend toward changing partners, might be indicative of evolving market conditions, the emergence of competitive local players, or changing organizational needs.
5. Emphasis on Local Leasing Companies
By 2023, there’s a discernible shift towards forging partnerships with local leasing entities, evident across different fleet sizes.

This trend suggests that fleet managers, especially those overseeing larger fleets, are increasingly identifying and leveraging the advantages of local collaborations, possibly driven by the allure of customized solutions, alignment with local regulations, and an intricate understanding of regional markets.

6. Global Leasing Alliances Meet Needs Effectively
Across various fleet sizes, there’s a clear upward trajectory in satisfaction levels when engaging with global leasing alliances. These alliances seem to resonate more with managers overseeing larger fleets, suggesting that such collaborations are better poised to cater to the complexities inherent in expansive operations.

This consistent uptick in satisfaction levels over the years hints at the proactive approach of global leasing alliances in refining their services to better cater to the multifaceted requirements of international fleets.

7. Shifting Priorities in Leasing Initiatives
In the realm of leasing initiatives, there’s a palpable shift toward sustainable and adaptable mobility solutions. Electric Vehicle (EV) Leasing is particularly prominent, with an increasing number of fleet managers either already adopting it or considering its implementation.

This inclination mirrors the global emphasis on environmental sustainability. Additionally, the burgeoning interest in diversifying mobility options points to an evolving recognition of the benefits of providing a more flexible and varied set of transportation solutions to cater to the dynamic needs of employees and organizations.

In essence
The landscape of fleet management is a tapestry of global trends, regional nuances, and the interplay of traditional and innovative practices, all evolving in response to changing environmental, organizational, and employee needs.
What is your preferred vehicle fleet finance solution?

- **Cash (allowance, expense, salary sacrifice)**
- **Outright purchasing**
- **Finance leasing, open book leasing (RV risk with the end-customer)**
- **Full service leasing (RV risk with the financial partner)**
What is your preferred vehicle fleet finance solution?

**Insight**

**Global Dominance of Full Service Leasing**
Across all regions, “Full service leasing” is the most preferred fleet finance solution. It’s particularly dominant in Europe, Latin America, and Asia Pacific. The allure is likely the reduced risk for the fleet manager as the RV risk is with the financial partner.

**North America’s Unique Approach**
North America stands out as a region where “Open Book Leasing” is the preferred method, indicating a comfort level with managing the RV risk within the company.

**Outright Purchasing in Africa Middle East**
The African and Middle Eastern market showcases a higher preference for “Outright purchasing” compared to other regions. This could indicate either a lack of suitable leasing partners, more available capital, or a different approach to asset management.

**Emerging Preference for Cash in Asia Pacific**
There’s a notable 15% of fleet managers in the Asia Pacific region who prefer using cash solutions, which might suggest evolving corporate policies or strategies in managing fleet expenses.

In summary, while “Full service leasing” dominates globally, regional variances underscore different risk appetites, financial strategies, and available options in the fleet management landscape.
With how many finance providers do you work (e.g. full service leasing)? The comparison among 2021 - 2023
With how many finance providers do you work (e.g. full service leasing)?
The comparison among 2021 - 2023

**Insight**

**Diverse Relationships in Europe and APAC**
Both European and Asia Pacific regions show high variability in the number of providers fleet managers work with. This might be due to a broader range of available service providers, varied fleet requirements, or country-specific preferences and conditions.

**Concentration in North America**
The fleet managers in North America seem to maintain relationships with fewer providers on average, indicating a preference for or dominance of certain key providers in the region.

**Trend Towards Consolidation**
Except in North America, other regions seem to show a decrease or fluctuation in the number of finance providers over the years. This could suggest a consolidation trend, where fleet managers might be streamlining operations or opting for providers who offer comprehensive solutions.

**Significant Variability**
High standard deviations, especially in Europe, Asia Pacific, and Africa Middle East, suggest that while averages provide a broad overview, individual fleet managers’ choices can vary widely, potentially due to the size of the fleet, nature of operations, or specific regional challenges.

In conclusion, while regions like North America show signs of concentration in terms of finance providers, others like Europe and Asia Pacific demonstrate diversity in relationships. Trends suggest possible consolidation in the industry, but the variability among respondents highlights the importance of tailored fleet management solutions based on individual company needs.
Does your strategy allow you to work with local leasing companies?

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<th>&gt;5000 Vehicles Fleet</th>
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<td>68%</td>
<td>63%</td>
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<tr>
<td>2022</td>
<td>71%</td>
<td>53%</td>
<td>61%</td>
</tr>
<tr>
<td>2023</td>
<td>71%</td>
<td>80%</td>
<td>76%</td>
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</table>
How satisfied are you about working with global leasing alliances*?

*An alliance is a collaboration of different leasing companies to respond to international fleet customer needs.
How satisfied are you about working with global leasing alliances?

**Insight**

**Growing Satisfaction**
Regardless of fleet size, there’s a clear increase in satisfaction when working with global leasing alliances from 2021 to 2023. This suggests that these alliances might have enhanced their offerings, services, or overall approach to meet international fleet customer needs better over these years.

**Higher Satisfaction with Larger Fleets**
Managers with larger fleets (>5,000 vehicles) consistently show slightly higher satisfaction levels compared to those with smaller fleets. This could be because global alliances are possibly more attuned to the needs and complexities of larger fleets, providing more comprehensive solutions.

**Positive Outlook for Global Leasing Alliances**
The upward trend and high satisfaction levels in 2023 indicate that global leasing alliances are effectively addressing the needs of their international clientele. This bodes well for the future of such collaborations, suggesting that they bring tangible benefits to fleet managers.

In summary, the data paints a promising picture for global leasing alliances. As they continue to meet and perhaps exceed the expectations of fleet managers, their role and influence in the international fleet management ecosystem are likely to grow. The consistent improvement in satisfaction scores is testament to their evolving capabilities and the value they bring to the table.
In which countries do you want to change your leasing partner?
In which countries have you not yet found a leasing partner?
What are the main criteria to select your leasing partner?
Benefit vehicles only: What has been the impact of working from home on your fleet size and mobility strategy?

**Resilience and Stability**
The fact that the majority have experienced no impact suggests a level of resilience and stability in many fleet management strategies. It might also indicate that while work from home has become prominent, the need for benefit vehicles remains unchanged for many.

**Rising Alternative Solutions**
The rise in alternative mobility solutions and the reduction in benefit cars due to these alternatives signal a trend where companies are moving towards more sustainable and flexible commuting options. This not only can serve as a perk for employees but also aligns with global trends towards sustainable urban mobility.

**Reevaluation of Benefits**
The decrease in benefit cars due to eligibility reviews indicates that companies are rethinking the necessity and criteria for providing cars as benefits. With increased remote work, some roles might not require frequent commuting or travel, leading to this re-evaluation.

In summary, while working from home has presented a challenge and an opportunity to re-evaluate mobility strategies, businesses have shown a mixed bag of responses. Some have retained their traditional structures, some have pivoted towards more sustainable options, and others have downsized or upsized based on their unique circumstances. It emphasizes the need for businesses to be agile, adaptable, and innovative in the face of changing work environments and norms.
Tool of Trade vehicles only: What has been the impact of working from home on your fleet size, mobility strategy or operations?

Operational Consistency
The fact that the vast majority of businesses have experienced no impact suggests a level of stability in how “Tool of Trade” vehicles are used. These vehicles are typically essential for specific job roles, such as technicians, sales representatives, or delivery drivers. The nature of these jobs might mean that remote work has less impact on their vehicular needs.

Limited Shift to Alternatives
The very low shift towards alternative mobility solutions indicates the specialized nature of “Tool of Trade” vehicles. The tasks they cater to might not be easily replaceable by shared or alternative mobility solutions.

Reassessment of Needs
A segment of companies is reassessing the necessity and criteria for providing these types of vehicles, evident in the reduction due to eligibility reviews. This could reflect changes in company operations or work patterns.

In conclusion, while “Tool of Trade” vehicles largely remained unaffected by the work-from-home trend, the data reflects a mixed set of responses. Companies are maintaining operational consistency, but there’s also a clear need for flexibility and reassessment in line with evolving business operations and needs.
What solution(s) have you implemented to overcome the consequences of the natural resource and supply chain crisis?
Car manufacturers

1. Diverse Brand Engagement
Within the global landscape of fleet management, Europe has emerged as a hub of diversity in terms of brand engagement. Fleet managers in this region tend to work with a wider range of car brands than their counterparts in other parts of the world, particularly when compared to regions like the Asia Pacific and Latin America.

A noteworthy trend is the increasing diversification in brand engagement that has been observed from 2021 to 2023. This shift could potentially be attributed to a variety of factors. It may indicate that fleet managers are casting a wider net in their search for solutions, seeking greater flexibility in operations, or perhaps adapting to changing market dynamics.

2. Electrification Trend in Fleets
As the automotive world undergoes a paradigm shift towards sustainability, brands that have established a strong footing in electrification, such as Tesla, Kia, and Polestar, are making significant inroads into the fleet industry.

Their growth trajectory is indicative of the broader movement towards electric vehicles and sustainable options. This transition is not without its challenges for established players.

Traditional powerhouse brands like BMW and Mercedes, while still anticipating growth, are now navigating waters muddied by the emergence of electric-centric competitors. Meanwhile, the declining trajectory of brands like Fiat and Alfa Romeo signals potential challenges and underscores the need for adaptability in this rapidly evolving landscape.

3. Criteria for Car Brand Selection
The criteria by which fleet managers select car brands provide valuable insights into the current state and future direction of fleet management. In today’s complex landscape, fleet managers prioritize a blend of factors when making their choices.

Cost, as expected, remains a crucial determinant. However, it’s heartening to note that cost considerations are not overshadowing the increasing importance of sustainability. The pronounced interest in electric vehicles (EVs) and alternative powertrains, coupled with emission strategies, underscores a transformative shift towards green mobility.

This not only aligns with the broader global movement towards environmental responsibility but also showcases the forward-thinking approach of modern fleet managers. Furthermore, safety remains a non-negotiable priority, reflecting the universal importance placed on the welfare of employees and assets.
4. Shift in Brand Preferences by Country
Delving deeper into regional dynamics, Europe emerges as a focal point of change. Several European countries, including powerhouses like Germany, Spain, and Italy, are witnessing notable contemplations in altering preferred car manufacturers.

Such shifts in allegiance could be driven by various regional factors – be it economic dynamics, political changes, logistical challenges, or even innovations introduced by certain manufacturers. In contrast to this European flux, a significant majority of fleet managers globally seem to favor stability. In 2023, 61% of them expressed no intention to alter their manufacturer preferences, suggesting a combination of brand loyalty and satisfaction with their current partnerships.

5. Fleet Size Evolution
When we examine the anticipated evolution of fleet sizes, different regional narratives emerge. Europe is at the forefront of growth, with fleet managers here being particularly bullish about expansion.

This optimism for the European market might be fueled by various factors ranging from economic conditions to strategic changes in fleet management. Contrastingly, regions like North America, Latin America, and the Asia Pacific are characterized more by stability than growth.

A significant number of fleet managers in these regions anticipate their fleet sizes to remain consistent, possibly indicating a mature and steady market, or perhaps a cautious approach given the broader economic and technological uncertainties.

To encapsulate
The dynamics of global fleet management are in flux, influenced by a confluence of technological advancements, sustainability considerations, regional preferences, and economic factors.

Europe, with its diverse brand engagement and anticipated fleet growth, is especially poised as a region of interest.
With how many car brands do you work?
With how many car brands do you work?  
Comparison 2021 to 2023
What car brand do you see growing and shrinking in your fleet?
In which countries do you want to change your preferred manufacturers?
In which countries do you want to change your preferred manufacturers?

**Insight**

**Stability**

A significant number of respondents (61% in 2023) stated "Not Applicable", indicating they don’t intend to change their preferred manufacturers in any country. This percentage is relatively consistent over the years, with 67% in 2022 and 59% in 2021. This suggests stability in manufacturer preferences for the majority of fleet managers.

**European Focus**

Most of the countries where changes in preferred manufacturers are considered lie within Europe. Germany, Spain, Italy, the UK, Belgium, Norway, and Poland stand out as notable countries where such changes are considered.

**Year-on-Year Changes**

- **Germany**: There is a significant increase in interest to change preferred manufacturers in 2023 (13%) compared to 2022 (3%).
- **Spain**: The interest in changing manufacturers has risen in 2023 (13%) compared to 2021 (2%).
- **Denmark**: There’s a drop in interest, going from 6% in both 2022 and 2021 to 3% in 2023.
- **Czech Republic**: There’s a notable absence of interest in 2023 compared to a 6% interest in changing manufacturers in 2022.

**Broadening Horizons**

Some countries have newly emerged in the 2023 list, such as Israel, which had 0% in 2022 and now stands at 3%. This suggests fleet managers are expanding or re-evaluating their operations in various regions.

In conclusion, for fleet managers, while a significant majority are not looking to change their preferred manufacturers, there’s notable activity in Europe. The reasons for these changes could range from economic, political, or logistical challenges in specific regions to innovations or offers introduced by particular manufacturers. Some countries, especially outside of Europe, witness little to no change, indicating stability in manufacturer preferences or potentially reflecting the lesser presence or influence of the survey’s respondents in these regions.
How will your fleet size evolve by the end of 2023?
How will your fleet size evolve? The transition from 2019 to 2023

**Insight**

**Europe**
Fleet managers anticipate the most significant growth in fleet size by 2023, with a 41% increase from 2022 to 2023. This reflects a trend towards expansion and may indicate an optimistic outlook for the European market or the adoption of new fleet management strategies.

**North America**
Stability seems to be the watchword here, with 57% of fleet managers in 2022 and 67% in 2023 expecting their fleet sizes to remain unchanged. While there’s a moderate anticipated growth, it’s clear that a majority foresee a steady market.

**Latin America**
A strong inclination towards fleet stability is observed, with 69% in 2022 and 71% in 2023 expecting no changes. However, there’s a noticeable decrease in the percentage of managers who anticipate fleet expansion, dropping from 20% in 2022 to 14% in 2023.

**Asia Pacific**
The trend here is similar to North America. A majority of fleet managers expect stability, with 72% in 2022 and 62% in 2023. There’s also a subtle increase in those predicting fleet growth, suggesting a cautiously optimistic approach in the region.

**Africa Middle East**
This region leans heavily towards keeping fleet sizes stable, with an overwhelming 79% in 2022 and 81% in 2023. The expected growth and reduction rates are quite low, indicating a very steady and possibly mature market.

Overall, the data suggests a global trend towards stability in fleet sizes by 2023, with Europe leading in terms of growth expectations. This could be influenced by various factors, including economic conditions, technological advancements, and environmental considerations affecting fleet management decisions.
Sustainability

1. Shift Towards Electrification
The transition towards electrification in fleet management is witnessing an evolutionary phase. Data suggests that by 2025, Battery Electric Vehicles (BEVs) will account for almost a third of the fleets, marking a significant leap from 9% in 2023.

This pace of adoption stems from advancements in battery technology, the expansive growth of charging infrastructure, and a rising tide of environmental awareness among businesses and the general populace.

2. Decreasing ICE Vehicles
Internal Combustion Engines (ICE) have powered vehicle fleets for decades. Yet, a seismic shift is underway. Europe, with its thrust on sustainable mobility and stringent emission norms, is at the forefront of this change.

By the end of 2023, many fleet managers in Europe are anticipating a marked reduction in the prevalence of ICE vehicles. This trend is also making ripples in regions like North America, albeit with slightly more moderated enthusiasm.

3. Charging Infrastructure Concerns
With the industry’s tilt towards electric vehicles, the conversation around charging infrastructure is gathering steam. By 2023, there’s an apparent clamor for a comprehensive Pan-European Roaming network for charging.

This underscores the importance of ubiquitous and easily accessible charging stations, especially for electric vehicles that ply the length and breadth of Europe.

4. CO₂ Emission Focus
The repercussions of vehicular emissions on the environment are under the scanner like never before. Fleet managers, staying in tandem with global sustainability goals, are gravitating towards imposing stringent CO₂ caps on their fleets.

By the dawn of 2030, aspirations in regions like Europe and North America are to have a lion’s share of vehicles that emit a minimal 1-60 g/km of CO₂. This not only reflects an alignment with environmental benchmarks but also showcases the industry’s ambition in pioneering sustainable mobility.

5. Data Accuracy for GHG Reporting
Accounting for Green House Gas (GHG) emissions is fast becoming a cornerstone in fleet management. The period between 2022 and 2023 has seen a concerted endeavor by fleet managers to gather impeccable data, especially in metrics like mileage and fuel consumption.

This meticulous approach is instrumental for drafting genuine GHG emission reports, mirroring the managers’ commitment to ecological responsibility and the sanctity of their reports.
6. Rising Fuel Costs Drive Changes
The global macroeconomic canvas, punctuated by escalating fuel and energy prices, is influencing fleet strategies. A significant chunk of fleet managers are hastening their transition to EVs, seeing them not just as an eco-friendly alternative but also as a strategic buffer against spiraling fuel expenses.

Electric vehicles, characterized by their relatively lower operational costs and the emerging charging infrastructure, are increasingly being recognized as a potent solution for the long haul.

7. Sustainable Manufacturing in OEM Selection
When fleet managers pick their Original Equipment Manufacturers (OEM), sustainability is taking center stage. While the engine’s nature remains a crucial criterion, other parameters, such as the sustainability ethos during manufacturing, life cycle assessment, and ethical sourcing, are gaining traction in the selection process.

This indicates a panoramic view of sustainability, one that doesn’t only evaluate a vehicle’s on-road impact but also scrutinizes its manufacturing pedigree.

8. Office Charging Strategy & Ratio
Most fleets, regardless of their size, have predominantly emphasized an “Office Charging” strategy. Specifically, 67% of smaller fleets (≤5,000) and 55% of larger fleets (>5,000) have already adopted this approach.

Furthermore, when examining the targeted charger-to-car ratio, smaller fleets aim for approximately 0.23 chargers per electric vehicle, while larger fleets set a more aggressive target of 0.32 chargers for each electric car.

9. Charging Solution Providers
For office charging solutions, a majority of fleet managers prefer Energy providers, capturing 56.25% of the preference share. However, when it comes to home charging, leasing companies emerge as the top choice, serving 56.25% of fleet managers. On-the-road charging further underscores the prominence of Energy providers with a commanding 62.5% share. Across all charging scenarios, charging specialists maintain a steady presence.

To encapsulate
The realm of fleet management is undergoing a profound transformation, led by electrification, sustainability, and avant-garde innovations.

As fleet stewards grapple with the challenges posed by escalating fuel costs, infrastructural demands, and ambitious ecological targets, they’re charting a course towards a greener, more efficient future in transportation.
How will the number of PHEVs evolve in 2023?

- Europe: 21% decrease, 52% increase, 27% keep same level
- North America: 13% decrease, 36% increase, 51% keep same level
- Latin America: 11% decrease, 19% increase, 70% keep same level
- Asia Pacific: 9% decrease, 22% increase, 69% keep same level
- Africa Middle East: 9% decrease, 24% increase, 67% keep same level
How will the number of BEVs evolve in 2023?
How will the number of HEVs/MHEVs evolve in 2023?
How will the number of alternative fuel vehicles (CNG, Biofuel, etc.) evolve in 2023?
Does your company have a CO\textsubscript{2} cap in place? What is the cap today, by 2025 and by 2030?

<table>
<thead>
<tr>
<th>Region</th>
<th>2023</th>
<th>2025</th>
<th>2030</th>
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<tr>
<td>Europe</td>
<td>13%</td>
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<tr>
<td>Africa Middle East</td>
<td>13%</td>
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</tbody>
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- > 250 g/km
- 201 - 250 g/km
- 181 - 200 g/km
- 161 - 180 g/km
- 141 - 160 g/km
- 121 - 140 g/km
- 101 - 120 g/km
- 81 - 100 g/km
- 61 - 80 g/km
- 1 - 60 g/km
Does your company have a CO₂ cap in place? What is the cap today, by 2025 and by 2030?

**Insight**

Europe
The gravitation towards lower CO2 emissions is evident. By 2030, 45% of managers target a cap of 1-60 g/km, up from a mere 4% in 2023. While the 121-140 g/km cap is prevalent in 2023 at 33%, this preference disappears by 2030.

North America
A remarkable shift is predicted with 50% of managers aspiring for a 1-60 g/km cap by 2030, from none in 2023. Higher emission bands, like 161-180 g/km which hold 29% in 2023, evaporate by 2030.

Latin America
The trend is toward more stringent caps, with 36% aiming for 1-60 g/km and 81-100 g/km each by 2030. Higher caps like 161-180 g/km and 181-200 g/km, which make up 25% and 13% in 2023 respectively, shrink significantly by 2030.

Asia Pacific
By 2030, half of the managers target the lowest emission cap (1-60 g/km), a drastic rise from 2023. Notably, categories like 121-140 g/km and 161-180 g/km, which are prominent in 2023, see a considerable reduction by 2030.

Africa Middle East
There’s a balanced shift toward both lower and middle-range CO₂ caps. By 2030, 38% lean towards 1-60 g/km, and 31% eye the 81-100 g/km range. Interestingly, caps like 121-140 g/km, dominant in 2023, fade by 2030.

In summary, a global trend is evident where fleet managers progressively aspire towards vehicles with lower CO₂ emissions. The desire for stringent caps, especially 1-60 g/km, sees considerable growth by 2030 across all regions, indicating a global move towards sustainable fleet management.
What is your average CO₂ emission (g/km) per car per region?

- Europe: 118 g/km
- North America: 167 g/km
- Latin America: 140 g/km
- Asia Pacific: 137 g/km
- Africa Middle East: 146 g/km
What will be the share of full electric vehicles in your total fleet by 2025 and by 2030
Which segment of the supply chain should provide you with charging infrastructure?

**Leasing Companies Lead**

With 45% of fleet managers expecting support from leasing companies in 2023, it’s evident that these entities are seen as the primary source for EV charging solutions. Leasing companies’ familiarity with fleet management may offer a seamless integration of charging infrastructure services.

**Specialized EV Charging Providers**

A significant 32% of respondents are looking towards specialized EV charging providers, showcasing the growing importance and reliance on entities dedicated to electric vehicle charging solutions.

**Diverse Expectations**

While there are minor mentions of other providers such as energy companies, mobility providers, and car manufacturers, what stands out is the preference for a combined approach. The mention of “multiple from above” and combinations like “car manufacturer and EV charging provider” indicate that fleet managers are seeking holistic solutions, perhaps integrating the strengths of different providers for a comprehensive charging infrastructure.

In summary, while leasing companies dominate expectations, there’s a notable lean towards specialized EV charging providers and a combined approach, hinting at a multi-faceted strategy for EV infrastructure in the future.
Who is your charging solution provider today?
What will be your biggest challenge in adopting Electric Vehicles in your fleet in the next 12-18 months?

- Charging cards: 5.9
- Charging infrastructure at the office: 5.0
- Operational challenges, e.g., mileage collection, driver reimbursement: 5.0
- EV availability: 4.6
- Charging infrastructure at home: 4.1
- TCO: 4.0
- Fit for purpose selection: 3.9
- Perception, such as range anxiety, within the driver community: 3.5
Do you calculate and report the amount of CO$_2$ from the electricity consumption of PHEV and BEV? Comparison between 2022 and 2023
The following data are required to produce an accurate GHG (Greenhouse Gas) accounting report. How accurate is your available data?
In comparison with other elements such as cost or range, how would you rank, in your next OEM tender process, the importance of sustainable manufacturing?

**Higher Fleet Size, Greater Emphasis**
Fleet managers with more than 5,000 vehicles place slightly more emphasis on sustainable manufacturing with an average importance ranking of 3.8. This suggests that larger fleet operators might be more attuned to the global push for sustainability, possibly due to larger public scrutiny or organizational sustainability goals.

**Smaller Fleets, Comparable Concern**
For fleet sizes of 5,000 vehicles or less, sustainable manufacturing has an average importance ranking of 3.38. This indicates that even smaller fleets recognize the significance of sustainable practices, though slightly less than their larger counterparts.

**General Trend**
On the whole, with an average ranking of 3.64 across all sizes, sustainable manufacturing is an important consideration in the OEM tender process for fleet managers. This highlights a broader industry trend prioritizing environmentally friendly practices beyond just the vehicles themselves.

In essence, sustainable manufacturing is a growing concern for fleet managers across different fleet sizes, reflecting a broader shift towards more eco-friendly business practices in the automotive sector.
What is your targeted percentage of office chargers vs electric cars?

**Smaller Fleets - Moderate Approach**
For fleets sized ≤5,000, the targeted ratio is approximately 0.23 chargers per electric car. This means for every 100 electric cars, there’s a goal to have about 23 office chargers.

**Larger Fleets - More Proactive**
Fleets sized >5,000 exhibit a higher target, with roughly 0.32 chargers for each electric car, translating to 32 chargers for every 100 electric vehicles.

**Overall Trend**
On average, across all fleet sizes, the goal is to have about 0.28 office chargers for every electric vehicle, or 28 chargers for a fleet of 100 electric cars.

In summary, larger fleets are aiming for a slightly higher charger-to-car ratio, indicating a more aggressive strategy to ensure ample charging infrastructure. However, across all fleet sizes, there’s a notable emphasis on scaling office charging solutions in tandem with the introduction of electric vehicles.
Mobility

1. Mobility Solutions Adoption
The Global Fleet survey underscores the appeal of the Mobility Budget, particularly strong in Europe with a 62% adoption. The region’s policies and corporate culture could be driving this.

Outside Europe, its appeal averages at 35%. While Micromobility flourishes in Europe at 49%, regions outside show a modest 15% adoption. Carpooling and Bike Sharing see some favor in Europe but remain less popular in North America and Latin America.

2. Expectations from Mobility Solution Suppliers
Leasing companies have consistently been the primary choice for corporate mobility solutions, showcasing their reliability.

They’ve maintained an average rating of 3.4 from 2019 to 2023. Conversely, Ride Hailing and Ride Sharing Companies experienced a drop in expectations, indicating a shift in the industry’s dynamics. Fuel and Energy Providers too have seen a subtle decline from 2019 to 2023, hinting at the rise of sustainable transportation alternatives.

3. Drivers and Barriers for Mobility Solutions
Sustainability remains a critical driver in the adoption of mobility solutions, seeing its importance rise from 4.339 in 2020 to 4.553 in 2023. Alternatives to traditional cars and employee benefits continue to be significant motivators.

However, “Time Restriction” emerges as a growing challenge, increasing from 1.661 in 2020 to 1.973 in 2023. As the industry evolves, adapting to these drivers and challenges will be paramount.

In essence
The global mobility landscape is in flux, influenced by regional preferences, sustainability considerations, and the changing roles of traditional providers in the face of emerging solutions.
Which mobility solutions do you have in place today, in at least one country?

- **Micromobility**: scooters, 1-seaters, bicycles, e-bikes...
- **Carpooling**: 30% in Europe, 15% in North America
- **Carsharing**: 11% in Europe, 8% in North America
- **Bike sharing**: 15% in Europe, 8% in North America
- **Mobility Budget**: 62% in Europe, 35% in North America, 38% in Latin America, 33% in Asia Pacific, 33% in Africa Middle East
Which segment of your supply chain should be offering corporate mobility solutions?
What are the main reasons for introducing mobility solutions?

![Bar chart showing the importance of different reasons for introducing mobility solutions. The reasons include Sustainability (4.6), Alternative solution of cars (4.3), Employee additional benefit (4.1), Country / City's car restriction (3.7), Reduction of cost (3.3), Reduction of car number (3.1), Management team's requirement (2.8).]
Are you planning to start with alternative mobility solutions to replace company cars?

### Strong Interest with Some Commitment
A noteworthy 13.15% of fleet managers have made a firm commitment to implementing alternative mobility solutions by 2024. This reflects a definitive shift and indicates that a portion of the industry is proactively preparing for change.

### Majority Considering the Shift
The majority of respondents, 60.52%, have expressed interest in transitioning to alternative mobility solutions, even though they haven’t set a firm deadline. This highlights a prevailing sentiment in the industry acknowledging the benefits of these solutions, even if concrete plans are not yet in place.

### Holdouts Remain
Despite the evident trend towards alternative mobility, 26.31% of fleet managers have no current plans to make the shift. This could be attributed to various reasons, such as operational constraints, financial considerations, or a preference for traditional models.

In summary, the momentum is clearly leaning towards the adoption of alternative mobility solutions over company cars. While not everyone is on board yet, a significant majority of fleet managers are considering or have already committed to this transformation.
Conclusion

Few industries are as dynamic and rapidly evolving as the fleet sector, which is undergoing yet another substantial transformation. This transformation is primarily driven by the intersecting forces of digitization and sustainability, which have become essential in global fleet management. Additionally, the twin trends of globalization and centralization are reshaping how fleet managers view and structure their operations, targets and supply chains.

As we look ahead, we anticipate that these pivotal trends will continue to consolidate over the next years.

About the authors

Global Fleet is the leading business-to-business media platform for global and regional corporate fleet leaders. The print and digital publications provide essential information, market analyses, and best practices that help international fleet decision makers and executives make strategic and tactical management decisions.

In addition, the Global Fleet events and conferences gather cross-functional stakeholders in fleet management to learn, to network and to get inspired.

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References

The information in this E-Book was gathered via an online questionnaire.
If you are interested in learning more about the results, the full version is accessible here.

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