

Preparing Today for the Fleet of the Future

Steve Nuttall
Director | ACA Research

Sponsored by



AGENDA



The Australian Fleet Market



The Australian Telematics Market



Segmenting The Telematics Market



Fleet Priorities



Technology Use & Maturity



Questions?



742 Australian fleet managers



Completed by one in ten of Australia's large fleets (250+ vehicles)

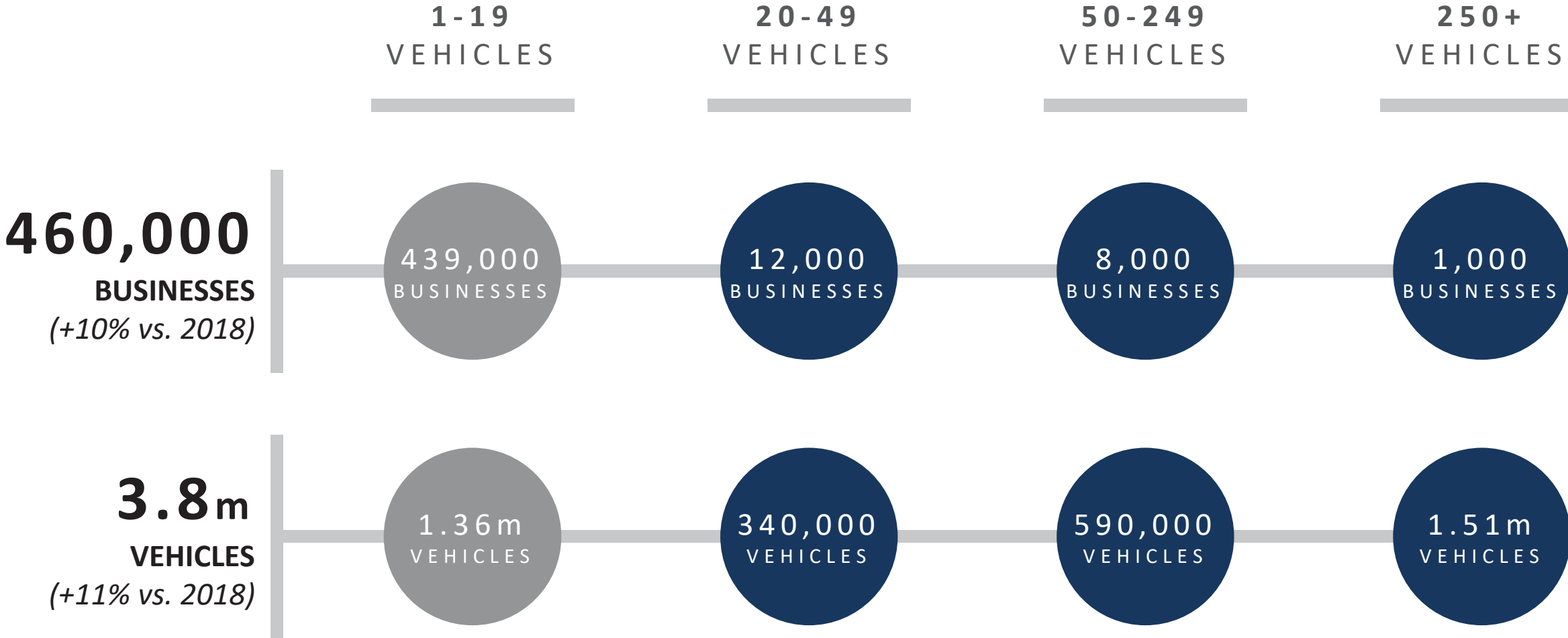


Thanks to AfMA (and its members) for their support



Expanded to US fleet market, report to be released soon by AFLA

THE AUSTRALIAN FLEET MARKET



THE AUSTRALIAN TELEMATICS MARKET

20-49
VEHICLES

50-249
VEHICLES

250+
VEHICLES

4,700
BUSINESSES USING
TELEMATICS DEVICES

1,900
BUSINESSES

2,300
BUSINESSES

500
BUSINESSES

567,000
TELEMATICS DEVICES

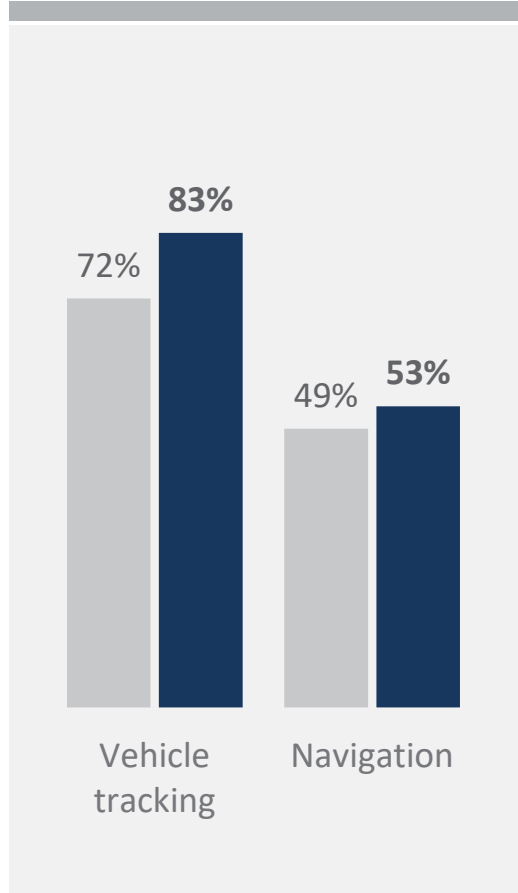
31,000
TELEMATICS
DEVICES

91,000
TELEMATICS
DEVICES

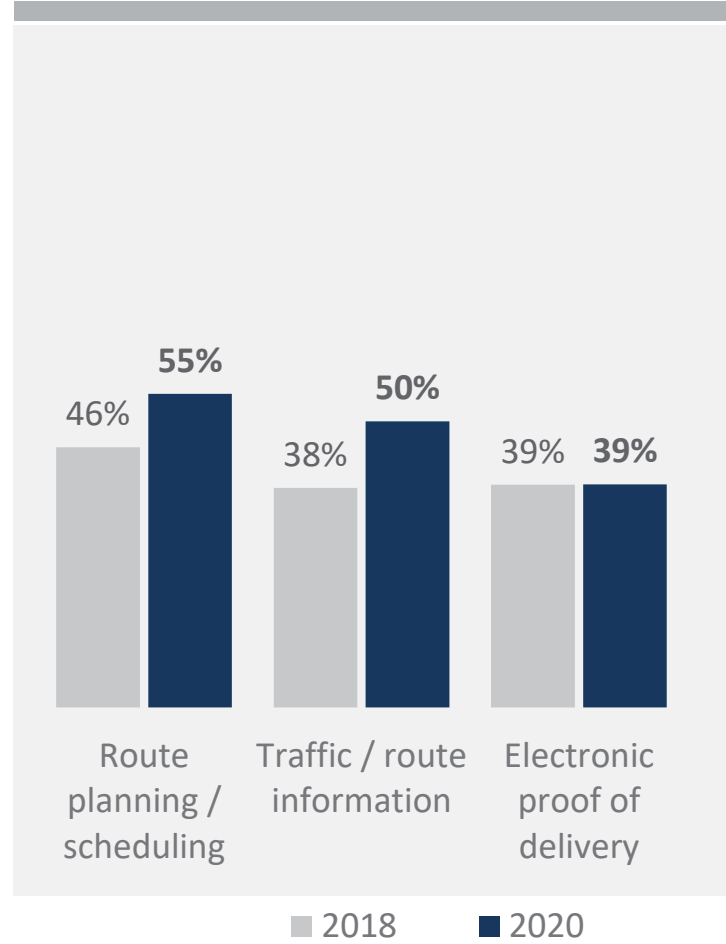
446,000
TELEMATICS
DEVICES

TELEMATICS FEATURES USED

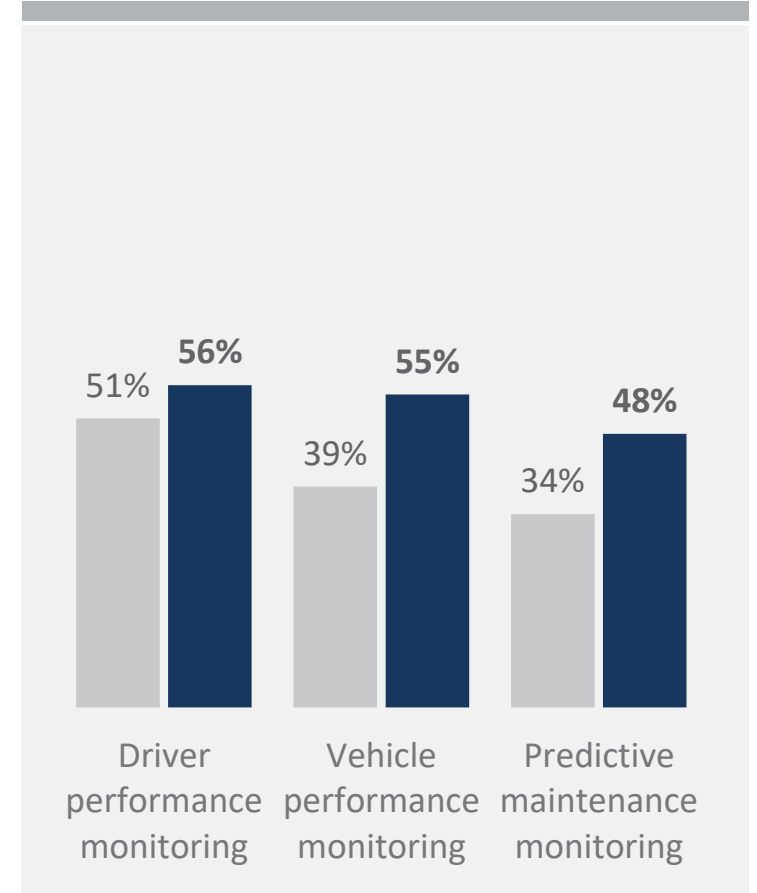
VEHICLE TRACKING



DELIVERY MANAGEMENT



ADVANCED ANALYTICS



SEGMENTATION OF TELEMATICS USERS



PLANNER

3 FEATURES

More basic features such as vehicle tracking



TRANSPORTER

6 FEATURES

Focussed on on-route performance optimisation



ANALYST

9 FEATURES

Advanced features and data analytics to monitor performance



TELEMATICS SEGMENTATION BY FLEET SIZE

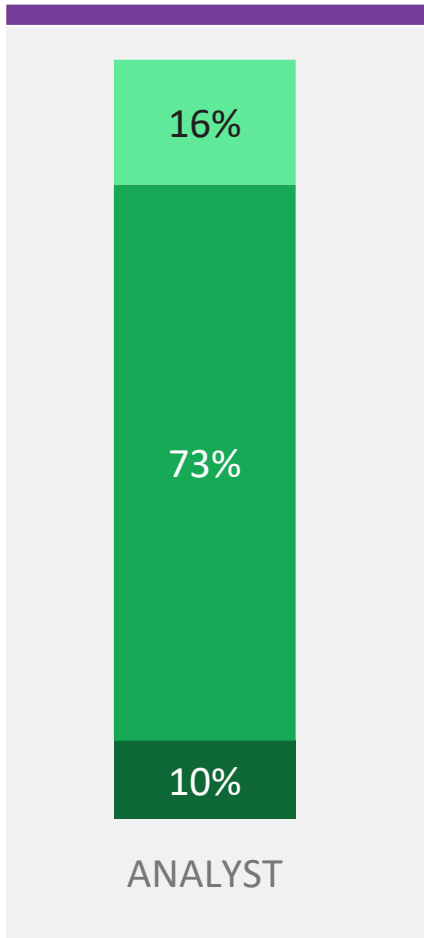
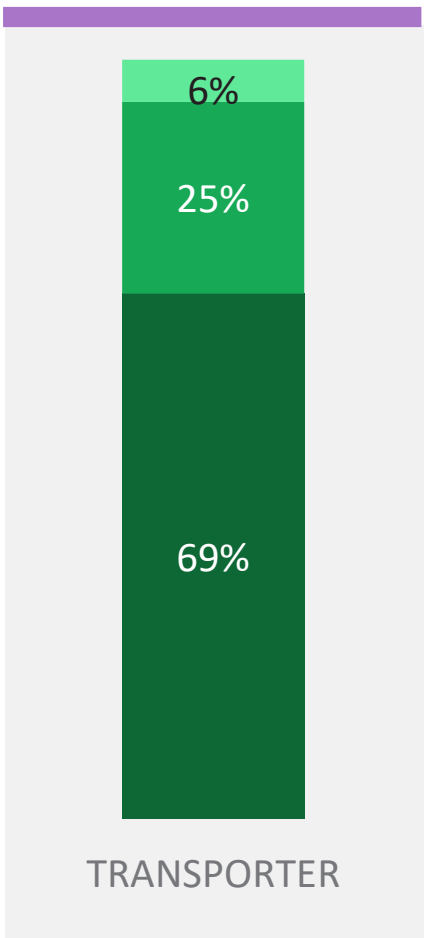
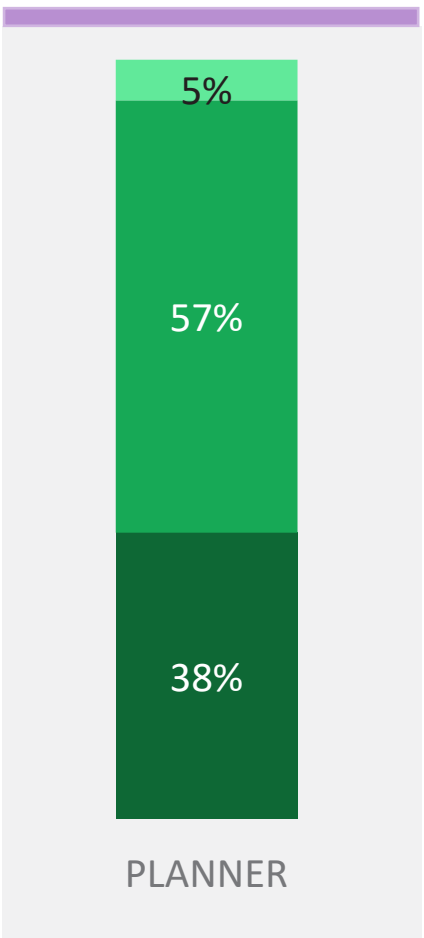
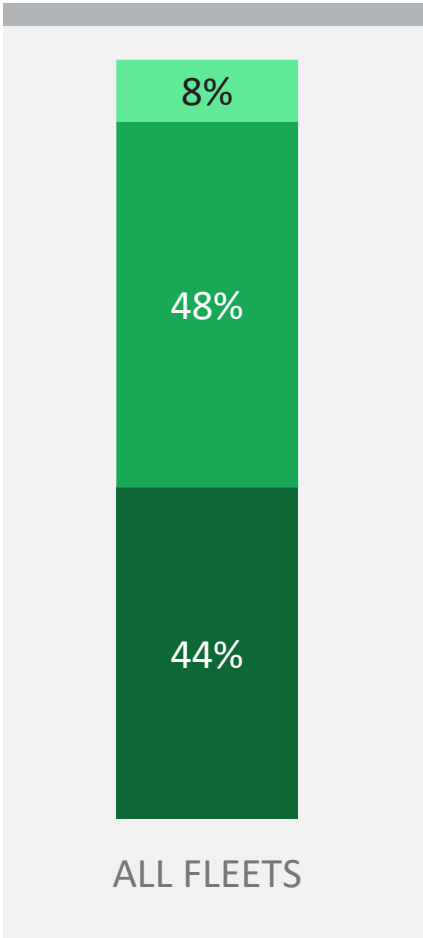
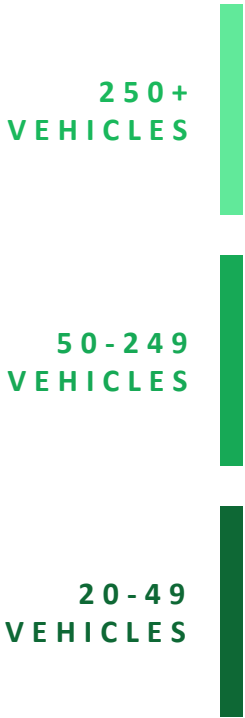


TOTAL

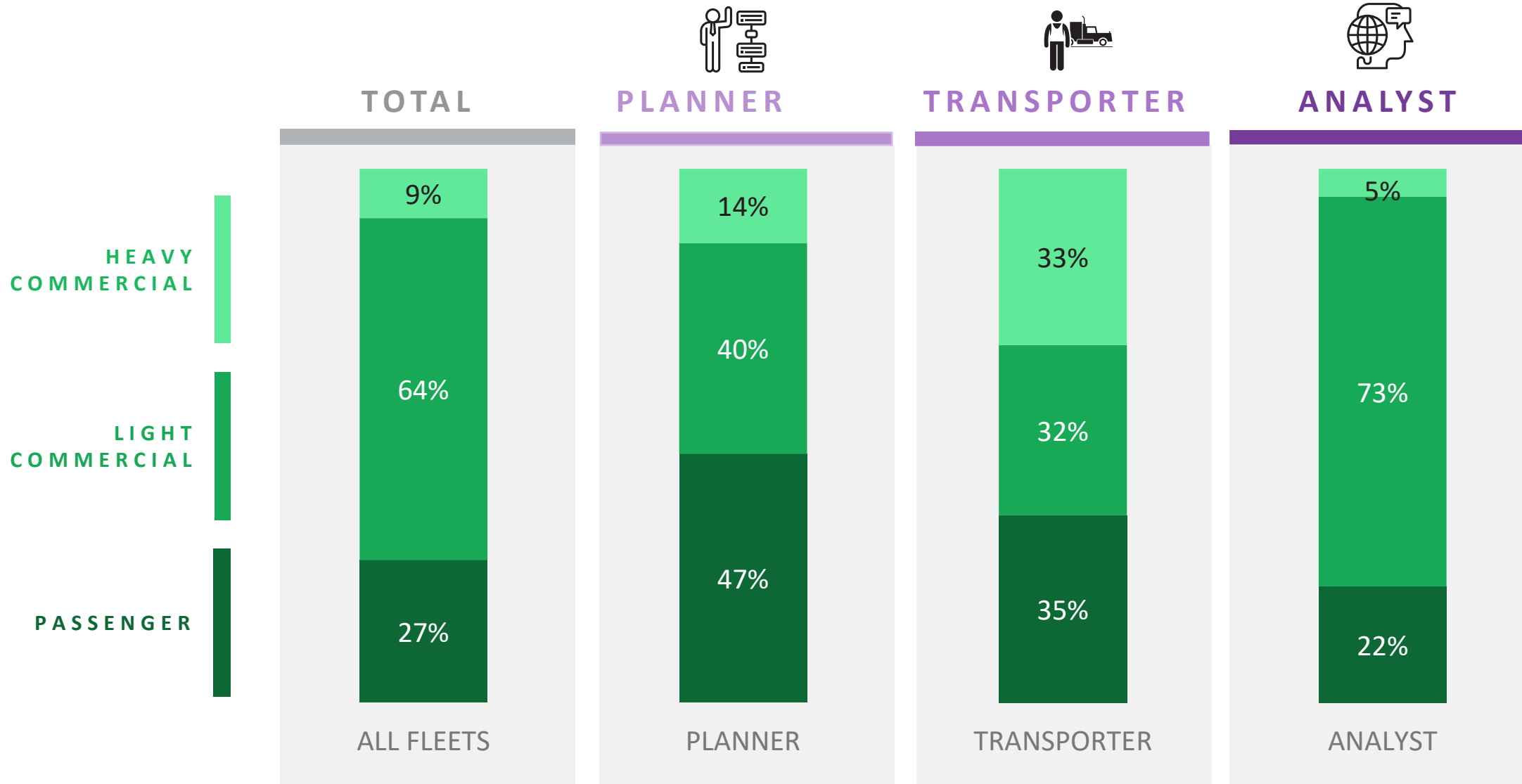
PLANNER

TRANSPORTER

ANALYST



TELEMATICS SEGMENTATION BY FLEET COMPOSITION



TOP FLEET MANAGEMENT PRIORITIES



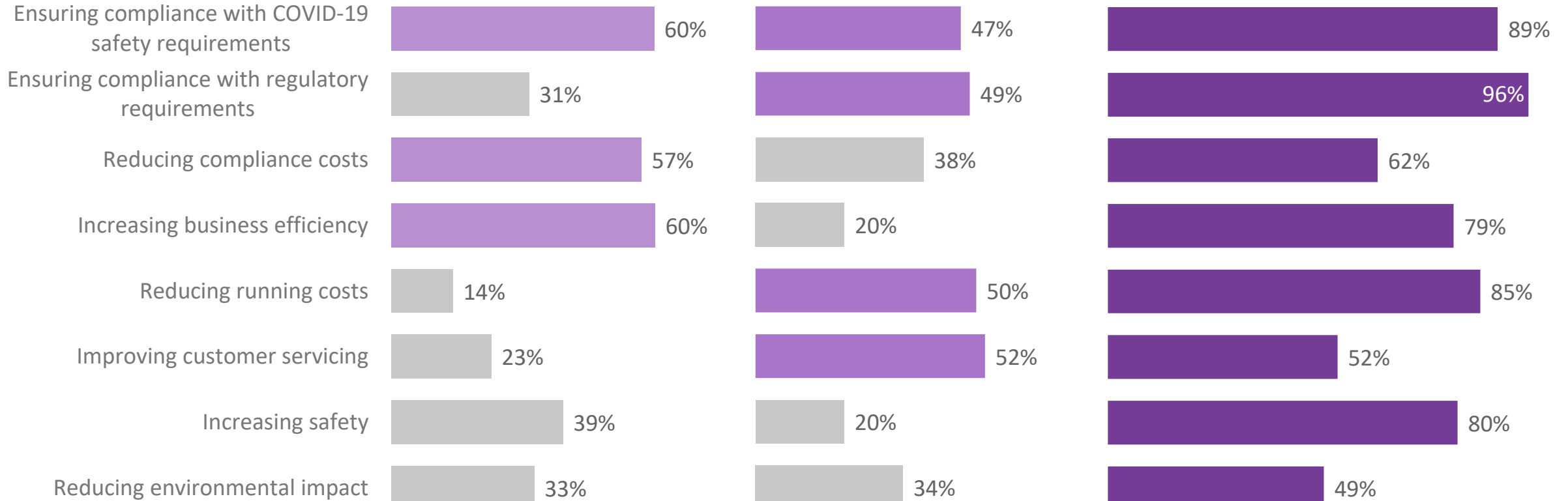
PLANNER



TRANSPORTER



ANALYST



FLEET TECHNOLOGIES USED



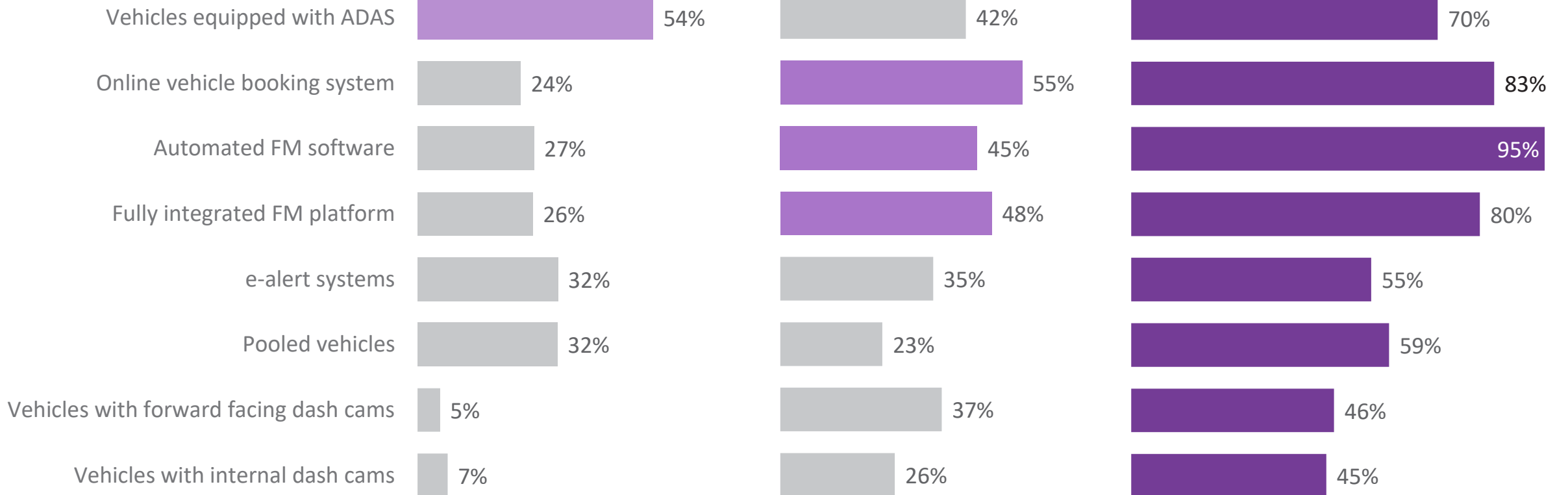
PLANNER



TRANSPORTER



ANALYST



SATISFACTION WITH TELEMATICS PROVIDER



PLANNER

-16

Extremely satisfied
(9-10)

18%

Satisfied
(7-8)

48%

Dissatisfied
(0-6)

34%



TRANSPORTER

-3

13%

71%

16%



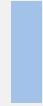
ANALYST

+40

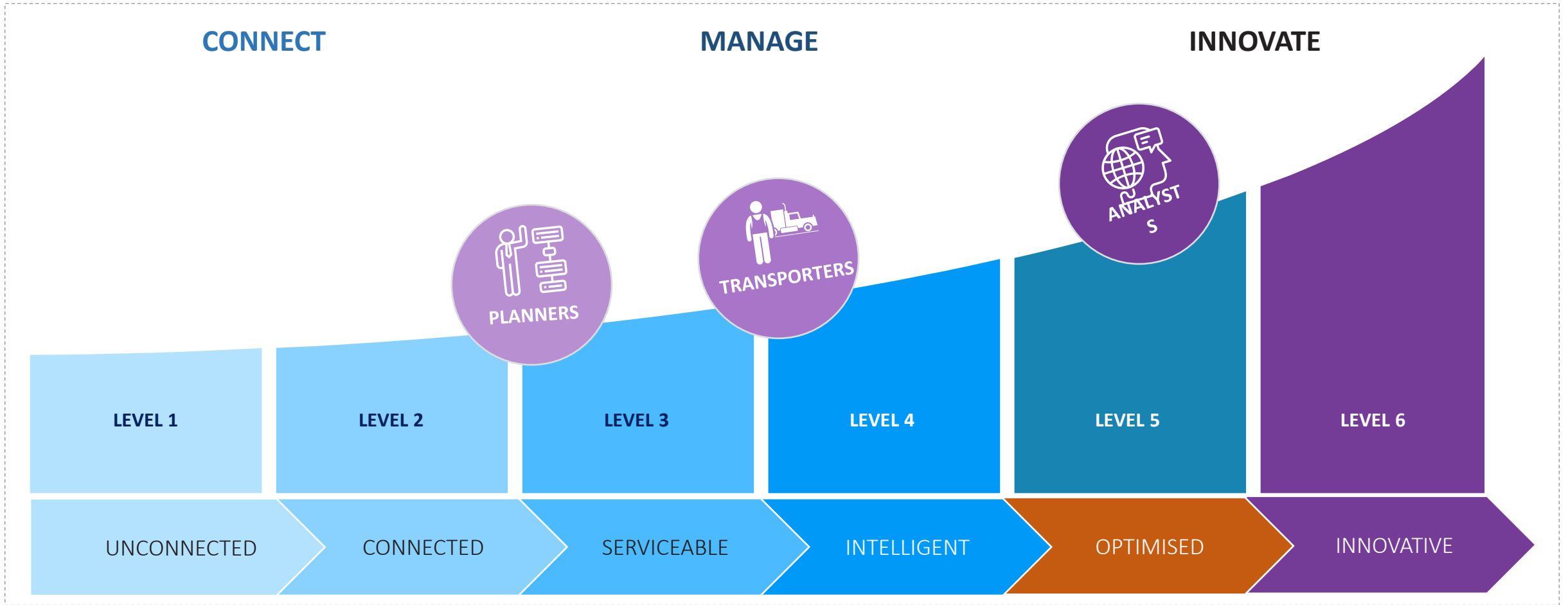
47%

45%

7%



TELEMATICS MARKET MATURITY



Automotive Insights

LATEST AUTOMOTIVE RESEARCH



Australian Corporate Fleet Insights: Second Edition (2020)

\$7,500.00 AUD



Australian Small Fleet Insights: Second Edition (2020)

\$7,500.00 AUD



Australian Corporate Fleet Telematics Insights: Second Edition (2020)

\$2,500.00 AUD



Australian Employee Mobility Insights: Second Edition (2020)

\$500.00 AUD



Prepare for the future,
don't recreate the past!

Steve Nuttall

Director, ACA Research

snuttall@acaresearch.com.au

Preparing Today for the Fleet of the Future

Steve Nuttall
Director | ACA Research

Sponsored by

