

AUSTRALIAN CORPORATE FLEET INSIGHTS REPORT June 2022



COMPLIMENTARY AfMA MEMBER OVERVIEW





BEN SELWYN
Director
ACA Research

We're very excited to be in a position to share the results of this program of work with the marketplace. As the 3rd edition of our Fleet Insights program, it builds on the 2018 and 2020 research, providing **topical and timely insights into the current fleet landscape**. This research could not be completed without the partnership and support of AfMA, and we would also like to thank all other stakeholders who have provided input at different stages in the process.

2022 is a **critical point for fleet operators**, as many of them shift beyond the challenges that we saw characterised in our 2020 report. While domestic and global issues are still having a significant impact on their operations, they now need to consider these in the context of **higher levels of asset utilisation and future demand**. This sits in stark contrast to the situation we saw two years ago, where assets were sitting idle, and the priority was creating a COVID-safe operating environment.

The ACA Research Corporate Fleet Insights Report maps the **current market landscape**, providing insight into the **needs, attitudes, and behaviours of fleet operators, now and into the future**. We believe that this report should be critical reading for all providers servicing Australian Corporate Fleets, helping them **tailor their offering to the unique needs and expectations of the market**.

Please get in touch if you have questions, or would like to discuss the research in more detail.



MACE HARTLEY
Executive Director
Australasian Fleet
Management Association

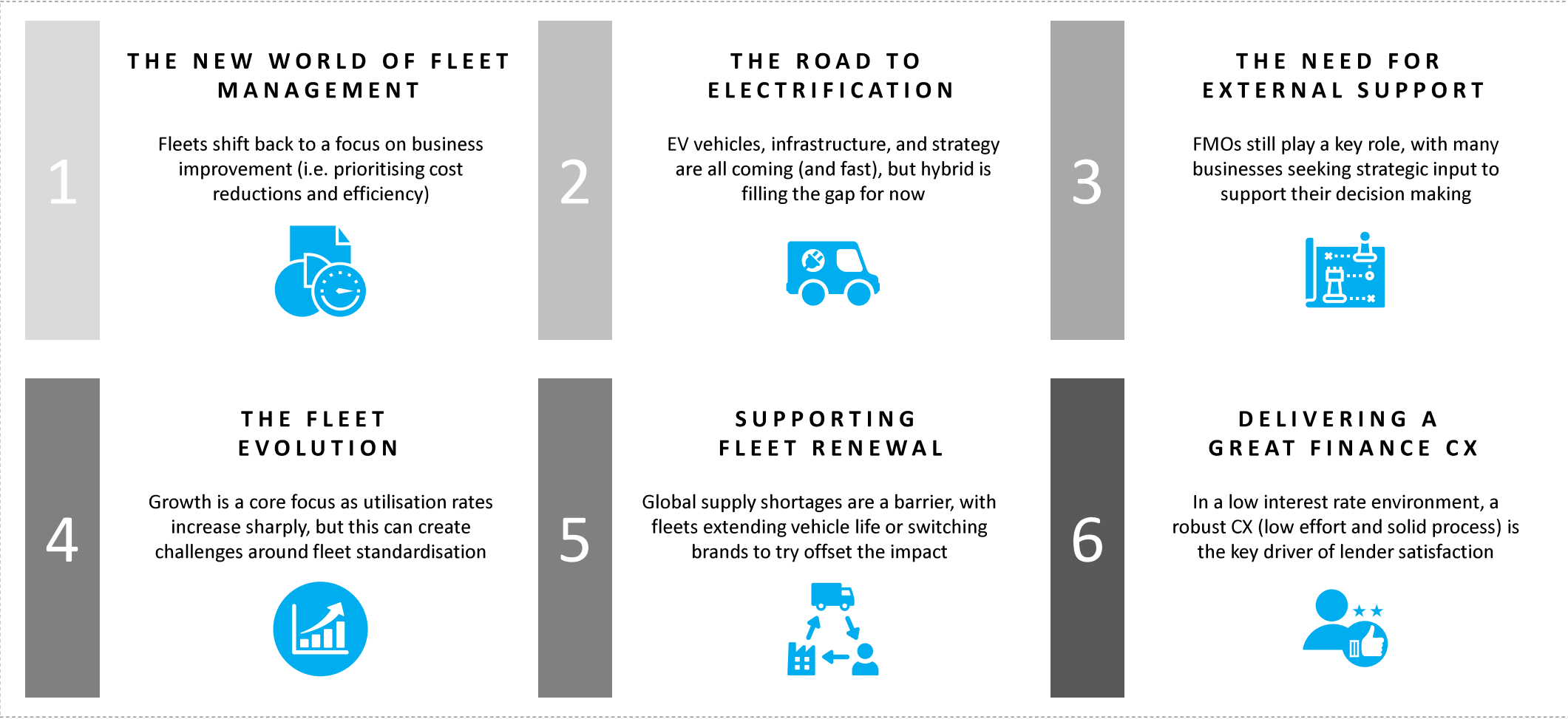
I'd like to thank those people and their organisations who took the time to complete the 2022 fleet survey. **AfMA exists to promote fleet management** as a professional vocation, **linking people and knowledge, creating meaningful outcomes**. Robust information is a key input to this process and it's only through active participation that we can track the latest industry trends and understand the current fleet landscape.

In this research, ACA Research draw out valuable insights into the key trends that have impacted the fleet industry as it has moved through (and hopefully beyond) the worst of the COVID-19 pandemic. The report again separates the findings between small, medium and large Corporate Fleets, as scale does affect decisions and the way a fleet is managed.

This 2022 program of research is an evolution from the 2018 and 2020 programs, providing deeper insights into the needs of fleet operators, and helping suppliers of products and/or services to improve their offerings, therefore providing better outcomes for fleets and their organisations.

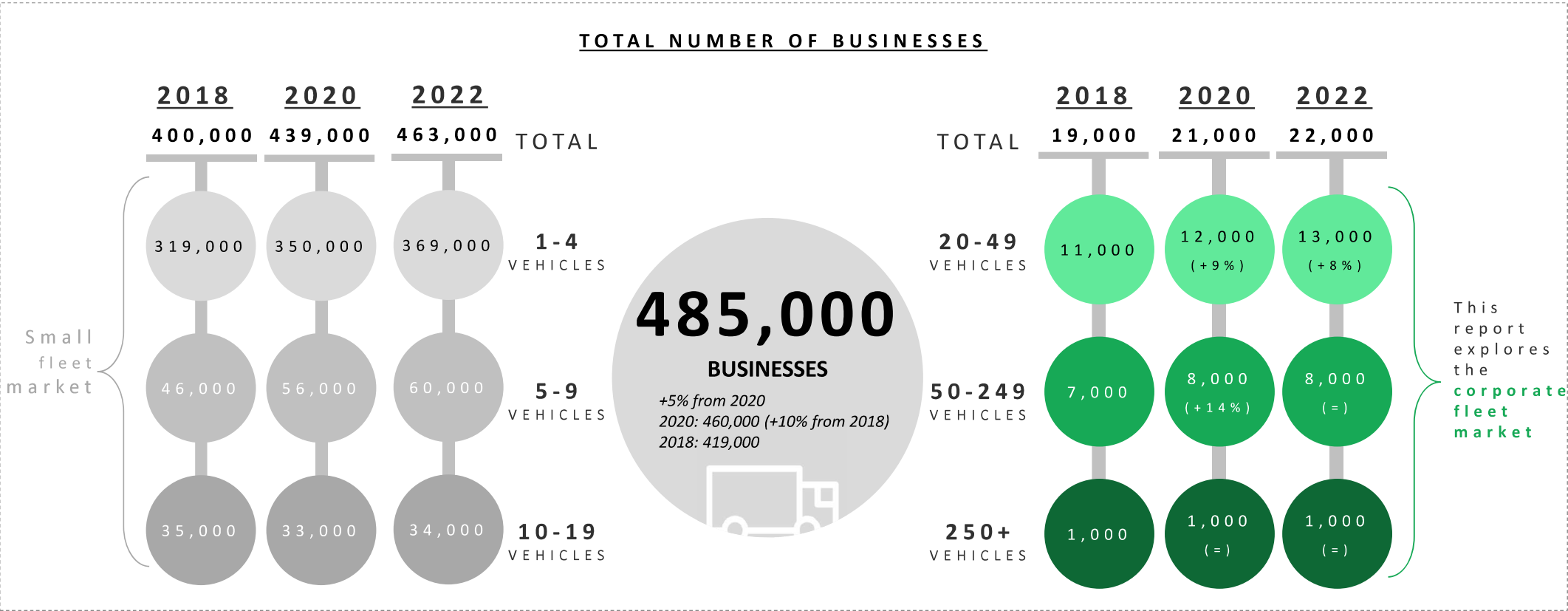
ACA Research have prepared a report that provides unmatched insights into the management of corporate fleets, their business as usual, needs and requirements, but if you have questions or want further information, give them a call.

KEY TAKEAWAYS



NUMBER OF BUSINESSES

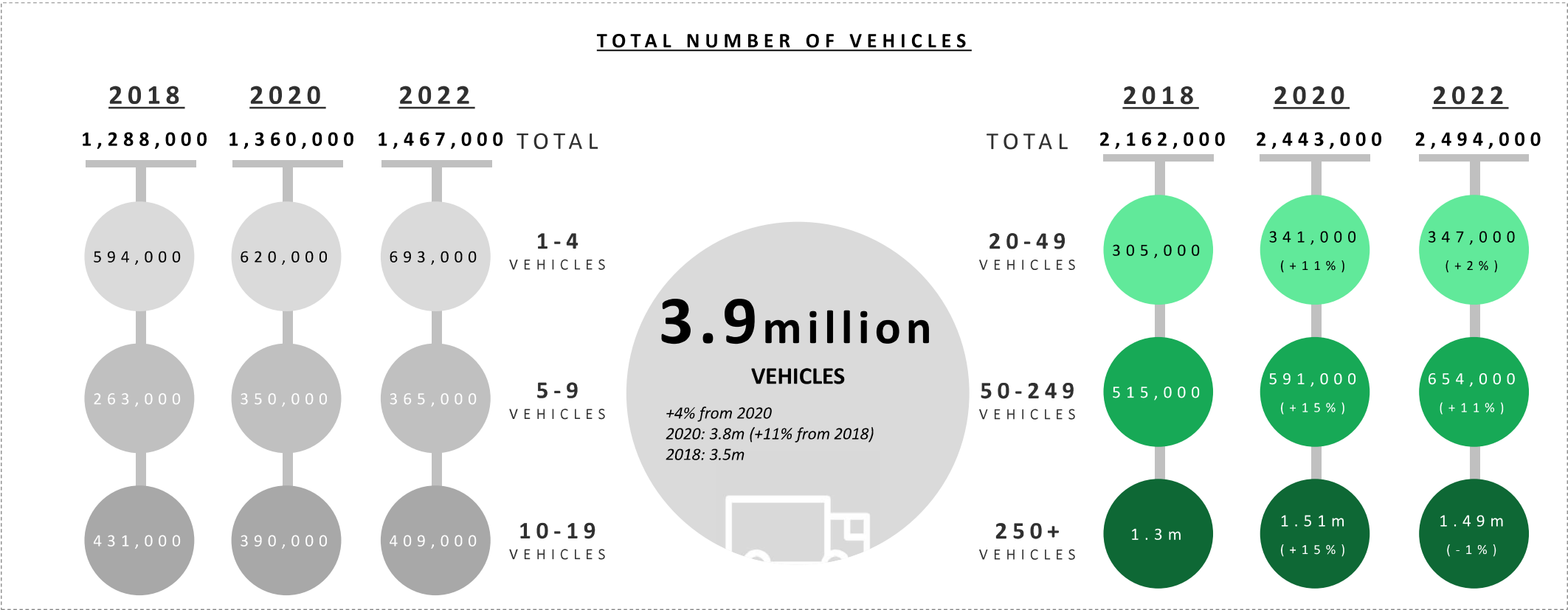
The number of companies operating business fleets continues to increase despite COVID-19; the bulk of the increase does however sit within the smaller fleets, with Corporate Fleet businesses continuing to account for approximately 1 in 20 fleet operators



All respondents (n=613), 1-4 vehicles (n=134), 5-9 vehicles (n=107), 10-19 vehicles (n=72), 20-49 vehicles (n=97), 50-249 vehicles (n=127), 250+ vehicles (n=76)
S7 - How many vehicles does your company currently own or lease? Only include vehicles that are used fully or partially for business purposes? Please exclude employee owned vehicles (including novated leases).

NUMBER OF VEHICLES

The Australian business fleet is now approaching four million vehicles, with the number of vehicles operated by Corporate Fleets increase by ~50,000; this segment operates 6 out of 10 fleet vehicles on Australian roads, with large fleets making up more than half of the total Corporate Fleet parc



Base: All respondents (n=613), 1-4 vehicles (n=134), 5-9 vehicles (n=107), 10-19 vehicles (n=72), 20-49 vehicles (n=97), 50-249 vehicles (n=127), 250+ vehicles (n=76)
S7 - How many vehicles does your company currently own or lease? Only include vehicles that are used fully or partially for business purposes? Please exclude employee owned vehicles (including novated leases).

RESEARCH METHODOLOGY

A robust sample that has been weighted to be representative of Australian Corporate Fleets by fleet size, location, and industry



MAIN RESEARCH
SAMPLE

N=300
CORPORATE
FLEET OPERATORS



KEY
SEGMENTS

Fleet operators
with:

20-49 vehicles

50-249 vehicles

250+ vehicles

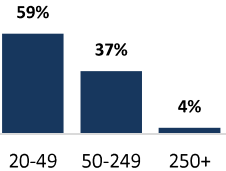


SURVEY
METHOD &
TIMINGS

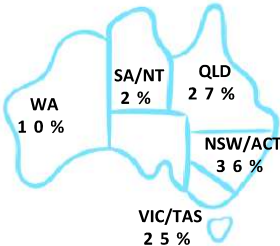
- 8th March – 20th May 2022
- Online survey with sample primarily sourced from an online panel. Sample was then supplemented with additional participants sourced from the AfMA database.

CORPORATE FLEET
WEIGHTED SAMPLE PROFILE

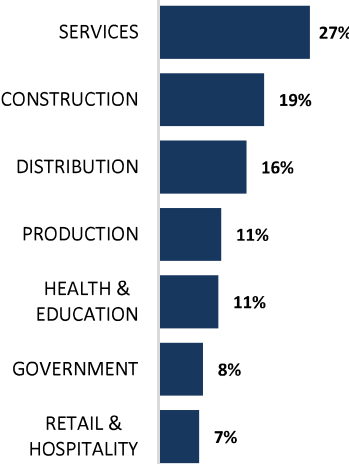
PARTICIPANTS
BY FLEET SIZE

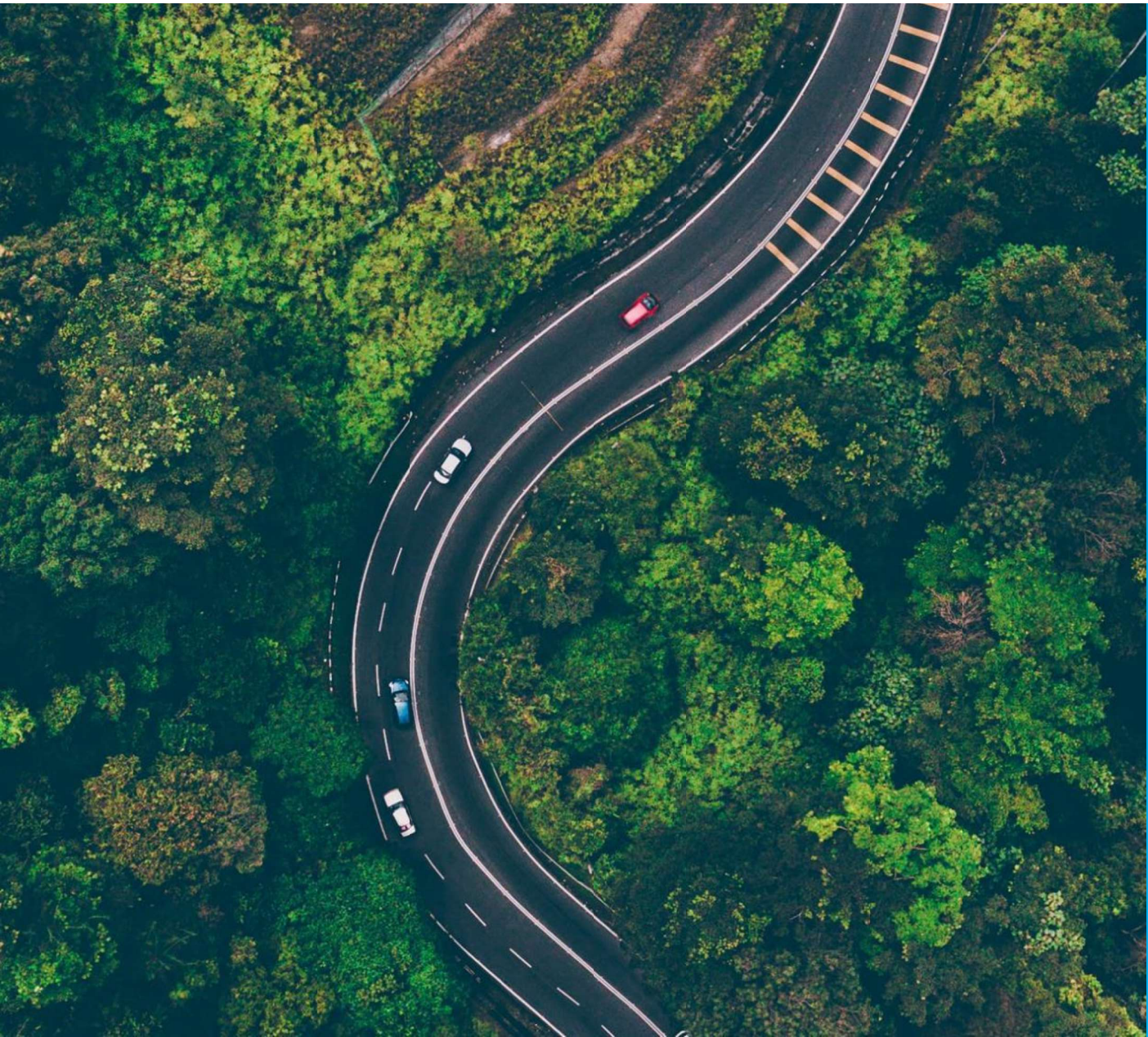


PARTICIPANTS
BY STATE



PARTICIPANTS
BY INDUSTRY





THANK YOU

For more information, please contact:

BEN SELWYN

Director | ACA Research
bselwyn@acaresearch.com.au
www.acaresearch.com.au

MACE HARTLEY

Executive Director | Australasian Fleet Management
Association
mace.hartley@afma.org.au
<https://afma.org.au>