

**Fleet Conference
& Exhibition**
AND FLEET AWARDS

MAY 23-24
ROSEHILL GARDENS
BLACKROUSE SYDNEY

What's Driving Change for the Fleet Industry

DR STEVE NUTTALL

acaresearch

fifth
quadrant

FLEET INSIGHTS



4 waves of research, starting in 2018



Wave 4: Survey of 201 Australia fleet managers with 20+ vehicles (corporate fleets)



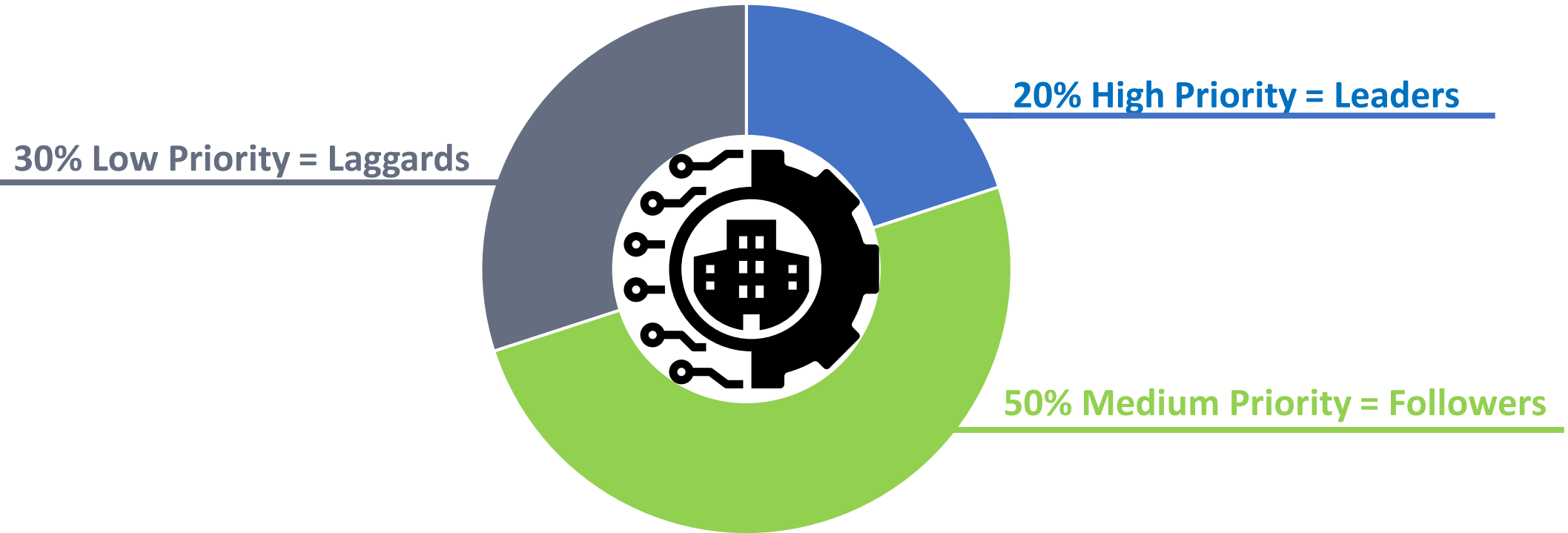
Wave 4 also surveyed 100 NZ fleet managers



Thanks to the ongoing support of AfMA





Digitising Fleet Operations

What priority is given to investing in hardware, software, connectivity solutions to digitise the management of your fleet?

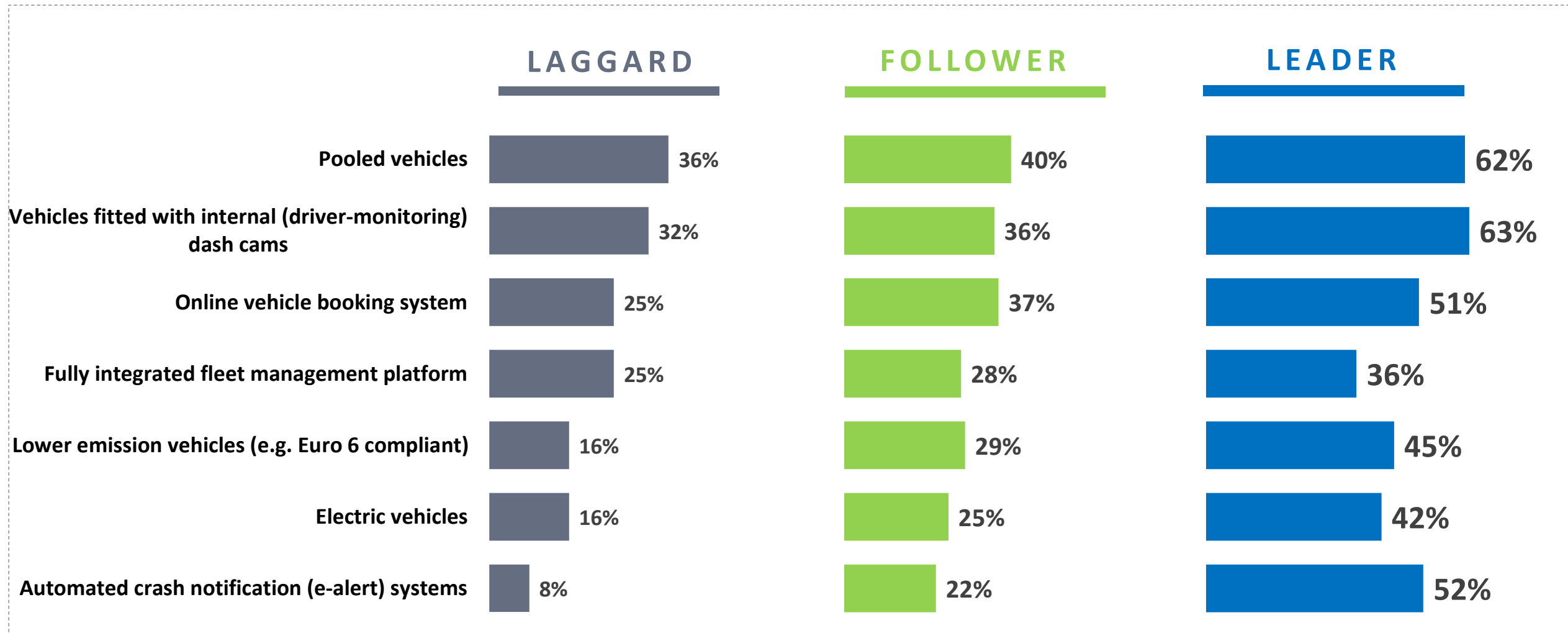


Fleet Priorities

HOW MUCH OF A PRIORITY ARE THE FOLLOWING?
% HIGH PRIORITY

	LAGGARD	FOLLOWER	LEADER
 Reducing running costs	62%	41%	78%
 Increasing business efficiency	53%	43%	71%
 Increasing vehicle safety	19%	36%	63%
 Preparing the business for impact of EVs	5%	20%	47%

Use of Vehicle and Fleet Technologies



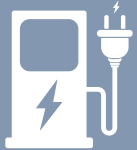



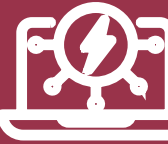
Preparing For Electrification



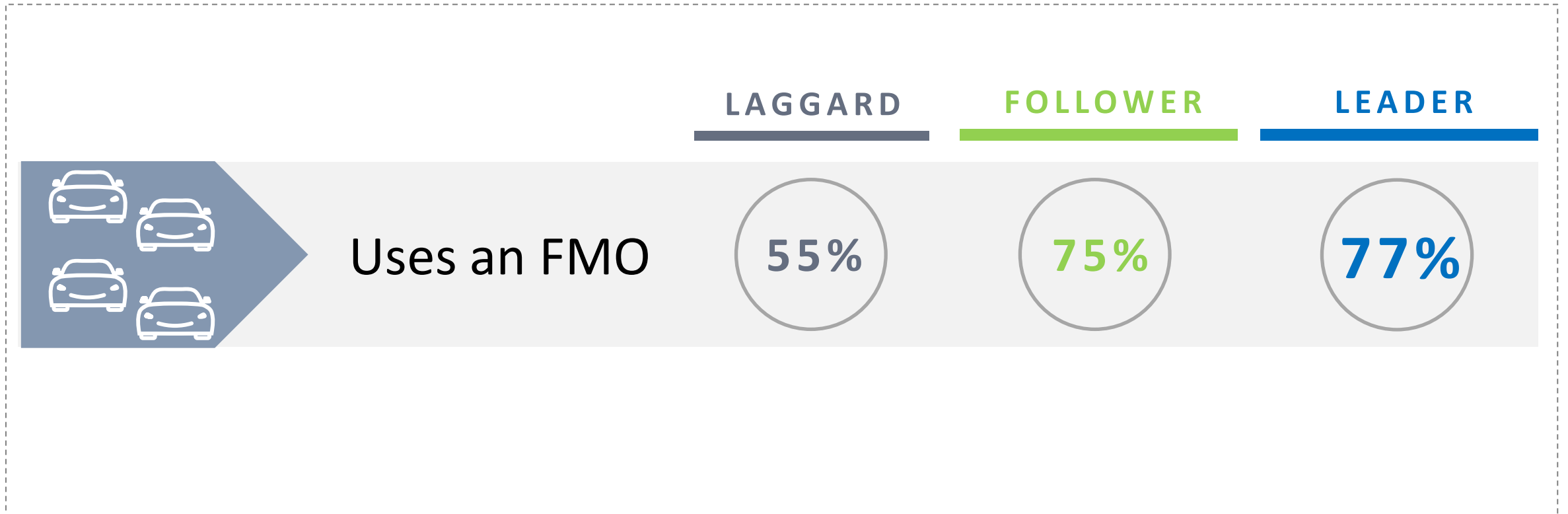
The EV Preparedness Checklist

	Conducted EV feasibility study	Identified charging infrastructure needs	Engaged utility provider to understand site grid capacity limits	Considered different charging payment solutions	Identified charging requirements for different vehicles
LEADER	46%	36%	35%	42%	32%
FOLLOWER	22%	10%	13%	16%	23%
LAGGARD	13%	15%	8%	13%	18%

EV Charging Investment (Made or Planned)

		LAGGARD	FOLLOWER	LEADER
	Electric vehicle charging stations	20%	34%	51%
	Power distribution units	6%	5%	42%
	Energy storage systems	10%	22%	29%
	Bi-directional charging inverters	1%	6%	27%
	Smart grid management systems	0%	15%	20%

Role of FMOs



Level of Preparedness For EVs

How well prepared is your business for the impact of EVs on the way you operate your fleet?

LAGGARD

FOLLOWER

LEADER



Very well prepared

4%

7%

28%



Quite well prepared

34%

55%

64%



Not well prepared

62%

38%

9%



Session Details

What's Driving Change for the Fleet Industry

Wed, 24/5

Insights
Plenary

Add session

SESSION FEEDBACK



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2023 Australasian Fleet Conference

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