

The Technologies That Are Shaping The Fleet Of The Future

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Introducing The Fleet Management Technology Maturity Curve

Fleets were asked about usage and future plans to introduce twelve automotive technologies.

The least mature fleets do not use these technologies and have no plans to whereas the more mature fleets are using most of these technologies.



The Fleet Technology Maturity Curve

Low Maturity (23%)
Connect

Medium Maturity (55%)
Manage

High Maturity (22%)
Innovate

LEVEL 1
Unconnected

LEVEL 2
Connected

LEVEL 3
Serviceable

LEVEL 4
Intelligent

LEVEL 5
Optimised

LEVEL 6+
Innovative

Top fleet management priorities

Rank	All Fleets	% rating top priority
# 1	Reducing costs	27%
# 2	Increasing safety	18%
# 3	Improving customer servicing	16%
# 4	Ensuring compliance with regulatory requirements	15%
# 5	Reducing compliance costs	13%
# 6	Increasing business efficiency	11%

Top priorities for technologically immature fleets

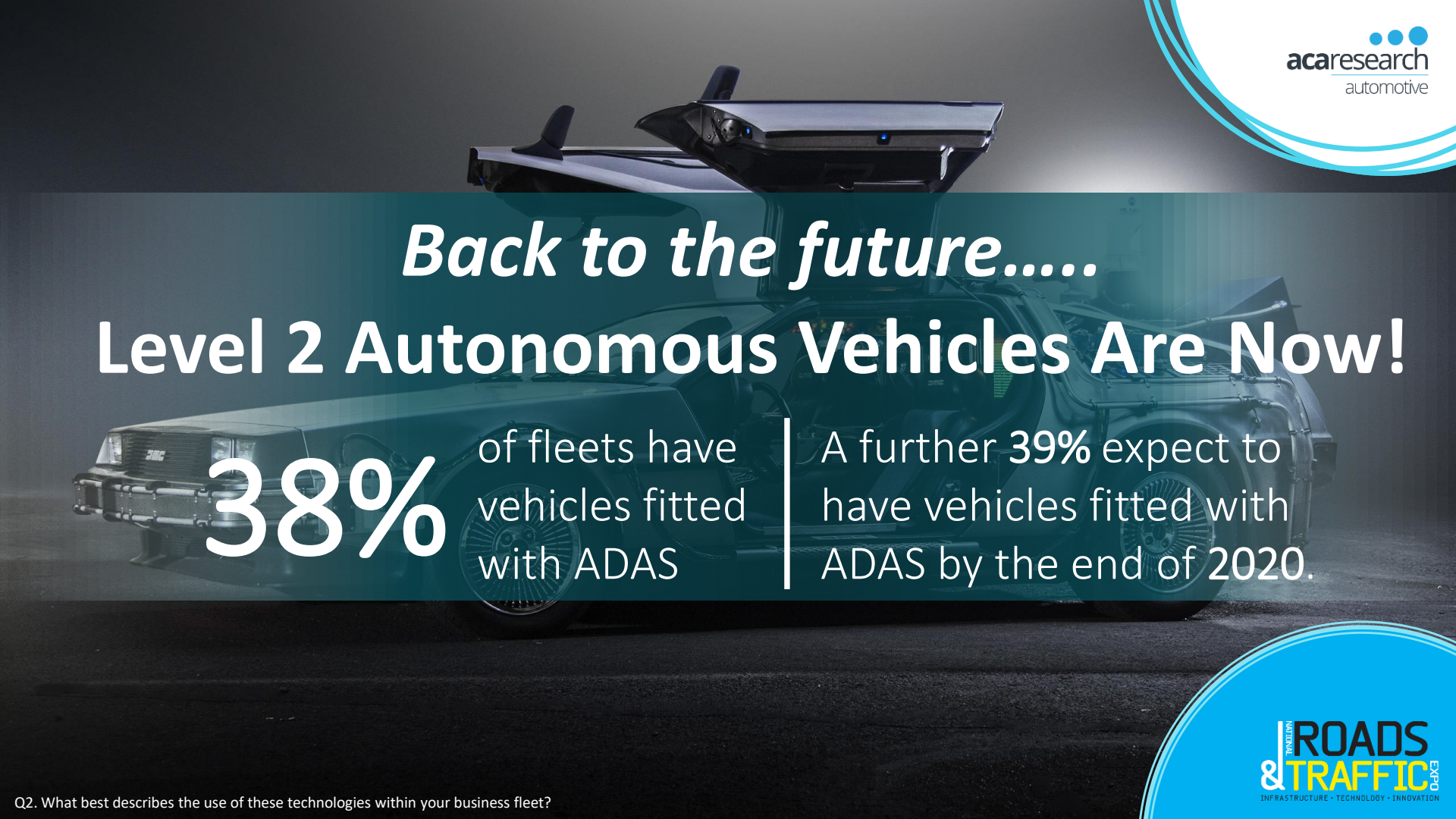
Rank	Low tech maturity	% rating top priority
# 1	Reducing costs	41%
# 2	Increasing safety	22%
# 3	Improving customer servicing	16%
# 4	Reducing compliance costs	11%
# 5	Ensuring compliance with regulatory requirements	5%
# 5	Increasing business efficiency	5%



Top priorities for technologically mature fleets

Rank	High tech maturity	% rating top priority
# 1	Reducing costs	20%
# 1	Reducing compliance costs	20%
# 3	Increasing business efficiency	17%
# 4	Improving customer servicing	14%
# 4	Increasing safety	14%
# 4	Ensuring compliance with regulatory requirements	14%





Back to the future.....

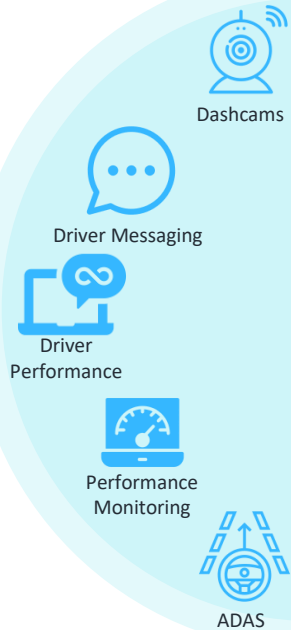
Level 2 Autonomous Vehicles Are Now!

38%

of fleets have
vehicles fitted
with ADAS

A further 39% expect to
have vehicles fitted with
ADAS by the end of 2020.

Top technologies currently used in corporate fleets

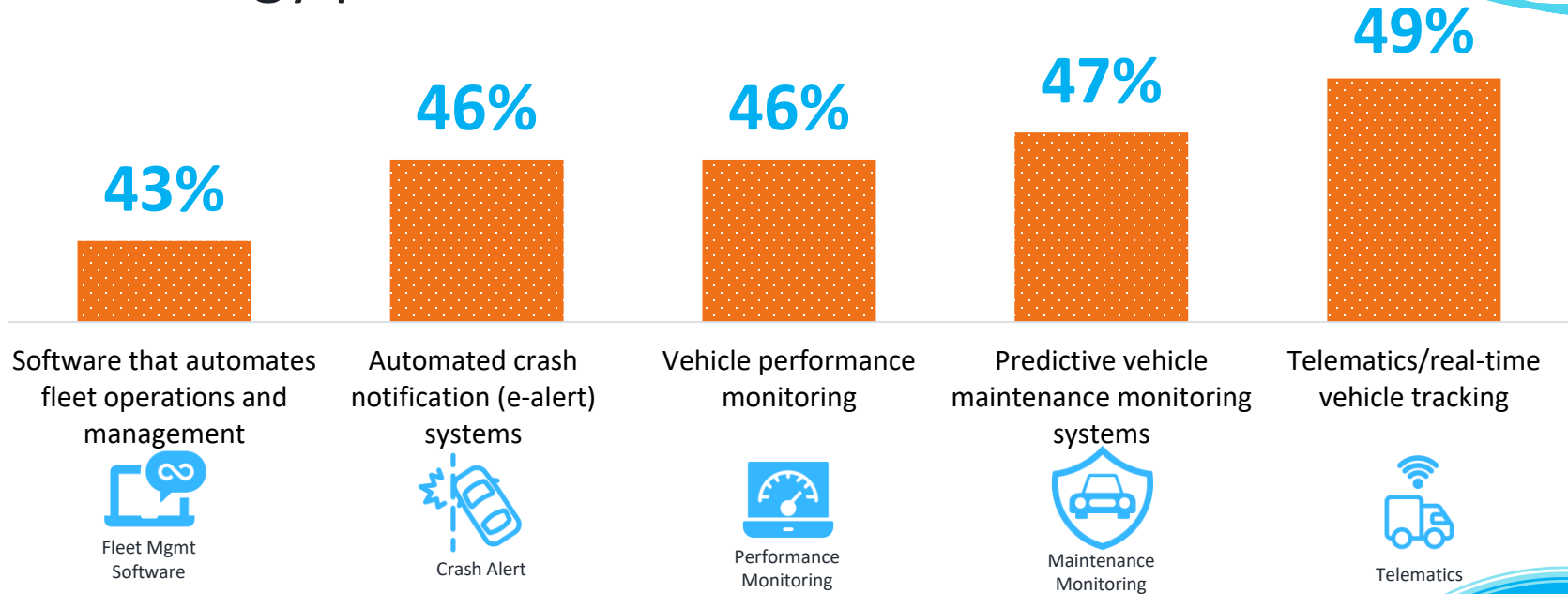


Tech	% Usage
Vehicles fitted with dash cams	53%
Driver communication/messaging systems	43%
Vehicle performance monitoring systems	41%
Software that automates fleet operations and management	41%
Vehicles equipped with ADAS	38%

Business fleets believe the key technologies shaping the future of fleet management to 2025 are:

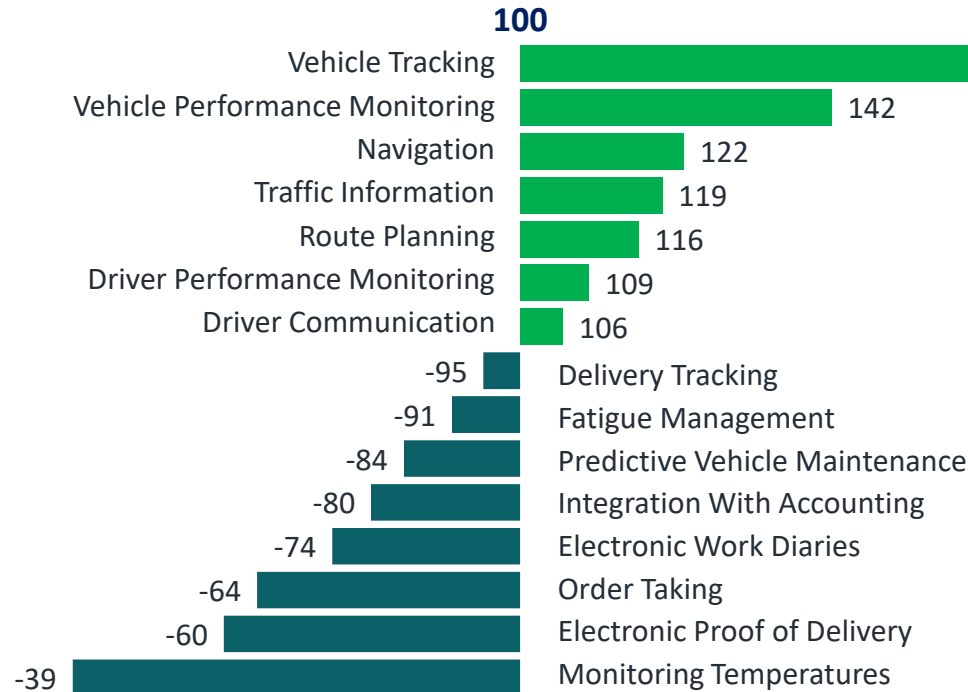
1) Connectivity 2) Automation and 3) Electrification

In the shorter term, telematics is the key technology planned for 2020



Looking at future demand, vehicle tracking and performance monitoring stand out as a priority for those planning to implement telematics

Importance of telematics features to business among those INTERESTED IN IMPLEMENTING TELEMATICS: Max Diff analysis



- A score greater than 100 represents a feature that is important to the business
- The further above 100 the score, the more important it is

Top fleet management priorities for users of telematics systems

Rank	Telematics users tech maturity	% rating top priority
# 1	Improving customer servicing	21%
# 1	Reducing costs	19%
# 3	Increasing safety	17%
# 4	Ensuring compliance with regulatory requirements	16%
# 5	Reducing compliance costs	14%
# 5	Increasing business efficiency	14%

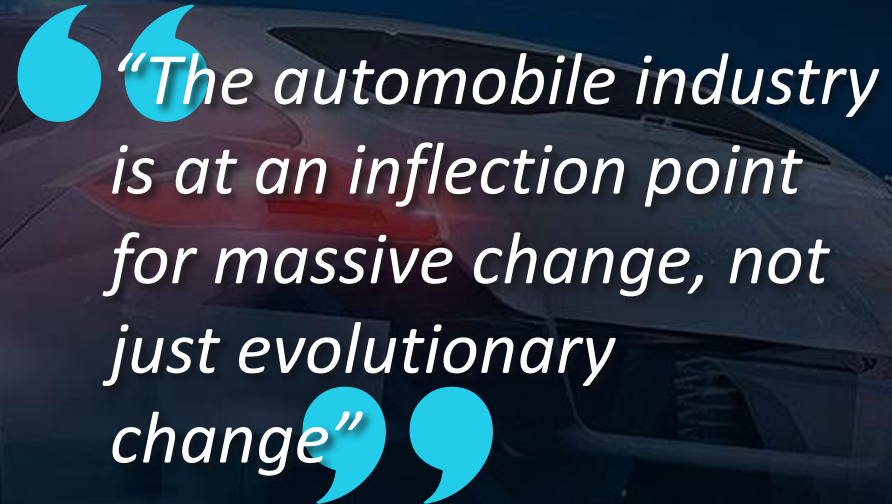


The more technologically mature fleets are better prepared for the future

Level of preparedness for the impact of new technologies on fleet operations	Low Tech Maturity	Medium Tech Maturity	High Tech Maturity	NET
Very well prepared	20%	25%	 51%	30%
Quite well prepared	46%	61%	40%	53%
Not well prepared	 34%	14%	9%	17%

Key Implications

1. Connectivity and autonomous features that improve driver safety are the key technologies that fleets are investing in
2. Technology enables the fleet of the future to be connected, safe, productive and resource efficient
3. In the longer term, business fleets will be part of a mobility and logistics ecosystem that is seamless, customised, on-demand and safe



“The automobile industry is at an inflection point for massive change, not just evolutionary change”

- Tim Cook, CEO Apple



Thank You!

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