2022 Fleet Technology Trends Report Europe

verizon connect

Fleet technology is one of the best allies for businesses to drive results and build resilience

Technology has become essential for businesses to obtain results and growth beyond the global and local scenario.

COVID-19 was a big challenge last year. The digitalisation of businesses has become critical in order for them to remain competitive in a hyper connected world during the next era of smart industry known as Industry 4.0.

Despite all the challenges and the uncertainty in the market, 2021 showed growth in fleet technology across Europe and the UK, helping businesses to achieve and stay competitive.

Beyond the standard benefits, fleet tracking helped businesses address the year's unique challenges, such as social distancing, using your garage at home, coordinating scheduling and dispatch from remote locations and pivoting to remain efficient in the face of schedule upheaval.

The Fleet Technology Trends Survey conducted for Verizon Connect by ABI Research, reported that the number of fleets using GPS tracking technology was 68% in 2021, highlighting that it is a consolidated and growing solution for businesses in Europe and the UK.

The survey also showed that GPS fleet tracking technology is key to helping deliver results and build resilience for all the principal industries included in the report.

Here are some of the key takeaways:

- **74%** of survey respondents who have a GPS tracking solution stated that it is "very" or "extremely" beneficial.
- **86%** of these respondents stated they reached a positive ROI within a year or less, with **44%** within 6 months or less.
- Customer service will make the difference in the short term that can help to improve customer retention and satisfaction. **56%** of survey respondents reported improved customer service since they implemented a fleet tracking solution.
- Beyond productivity, fleets are realising material cost savings from fleet technologies: **52%** of those implementing GPS fleet tracking have lowered their fuel costs, another **43%** have reduced accidents and **27%** have lowered labour costs.
- For smart technologies, like in-cab video the benefits go far beyond expectations and **57%** of video solution adopters have reduced accident costs and **47%** have lowered insurance costs.
- **75%** of respondents did not have a BEV (battery-electric vehicle) in their fleet Only ~**13%** of respondents with BEV had **11%** or more of their fleet consisting of BEVs. ~**42%** had **< 5%**

Although Europe is preparing for more widespread adoption, it still appears to be at an early stage as of 2021.

This report, based on surveys completed by more than 1,350 European fleet managers, executives and other mobile-business professionals, highlights the value fleet businesses are achieving by investing in fleet tracking technology.

The number of fleets using GPS tracking technology stands at 68% in 2021. This shows that it is a consolidated and growing solution for businesses across Europe

Fleet technology currently utilised

68%

GPS tracking.

41%

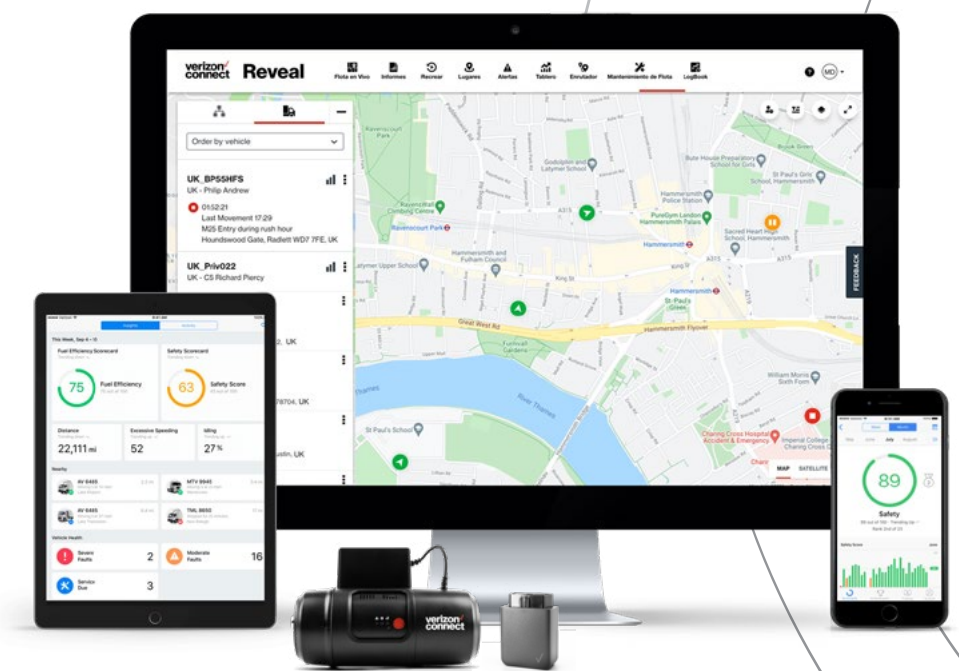
Field Service Management (scheduling, dispatch, communication).

38%

In-cab video (including front facing and driver facing cameras).

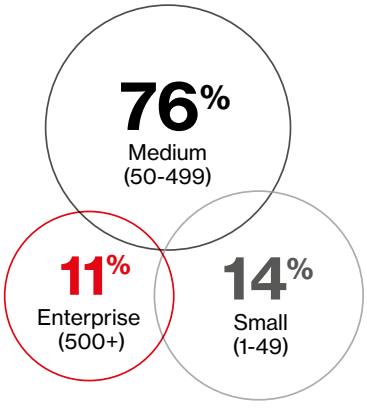
36%

Asset/Trailer/ Equipment tracking.



Top 5 segments that use this technology in their daily business

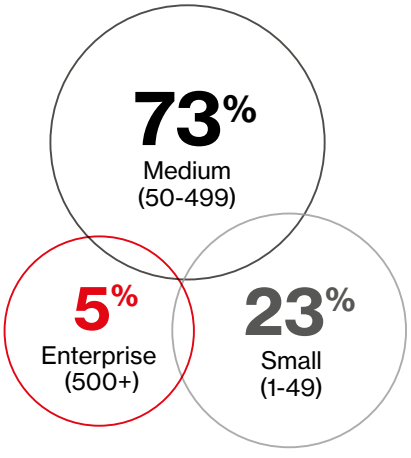
Construction



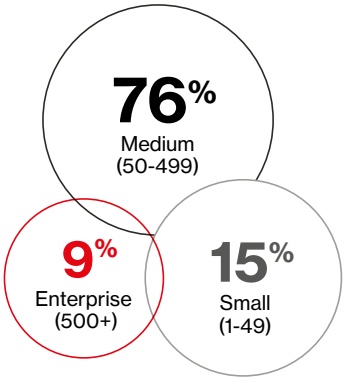
GPS tracking	79%
In-cab video	40%
Asset/Trailer/Equipment tracking	32%
Field Service Management	37%

General freight

GPS tracking	50%
In-cab video	43%
Asset/Trailer/Equipment tracking	45%
Field Service Management	43%



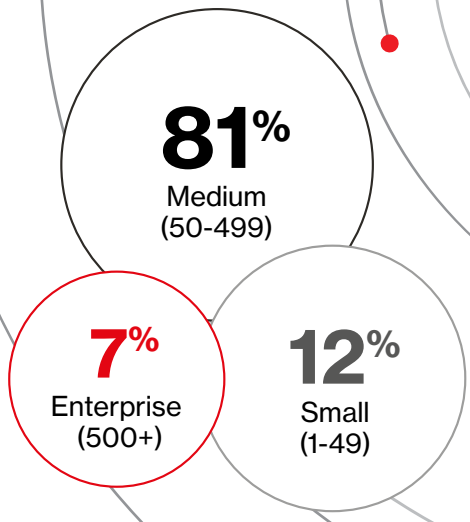
Government



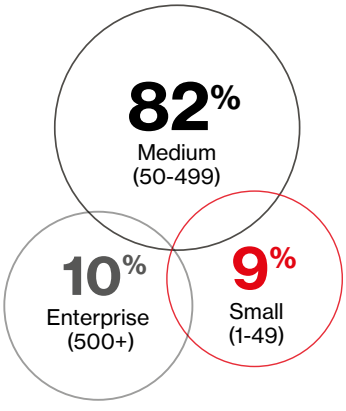
GPS tracking	68%
In-cab video	28%
Asset/Trailer/Equipment tracking	31%
Field Service Management	34%

Services

GPS tracking	**69%**
In-cab video	**39%**
Asset/Trailer/Equipment tracking	**37%**
Field Service Management	**43%**



Transportation



GPS tracking	**77%**
In-cab video	**40%**
Asset/Trailer/Equipment tracking	**42%**
Field Service Management	**49%**

74% of survey respondents who have a GPS tracking solution stated that it is "very" or "extremely" beneficial.

When customer results exceed their expectations

Fleet Technology Trends Survey key takeaways

74%

of fleets using GPS fleet tracking software found it “very” or “extremely” beneficial.

86%

reported a positive ROI within a year or less, with 44% within 6 months or less.

39%

rated increasing costs as a top challenge to daily fleet operations.

57%

of video solution adopters have reduced accident costs.

61%

of companies utilising asset tracking have seen improvement in utilisation.

Customer service emerged as the most important differentiator among businesses

Field Service Management emerged as one of the most important technologies to provide a better customer experience

GPS fleet tracking respondents reported

56%

improved customer service.

45%

have improved productivity.

52%

of those implementing GPS fleet tracking have lowered their fuel consumption.

43%

have reduced accidents.

COVID-19 changed our lives, along with the market so businesses took action to protect their teams

Many businesses reported a negative impact from the pandemic. After experiencing the pandemic's effects and the consequent economic impact, many companies made the decision to take action and prepare their fleets for future eventualities.

59%

set up processes to check for safety and security of employees and vehicles.

47%

invest in a system that helps track vehicle data.

42%

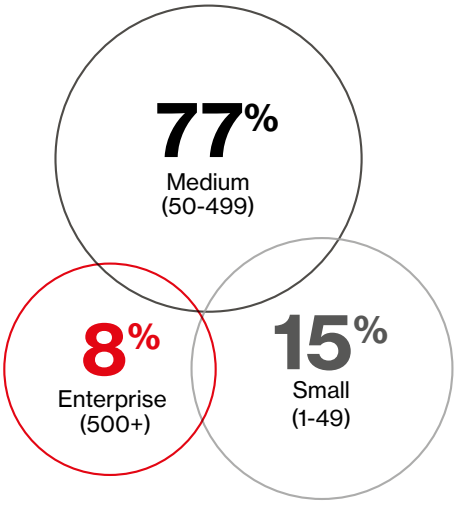
focus on plugging cost leakages.

38%

monitor employee and vehicle hours closely.

Who responded to the study?

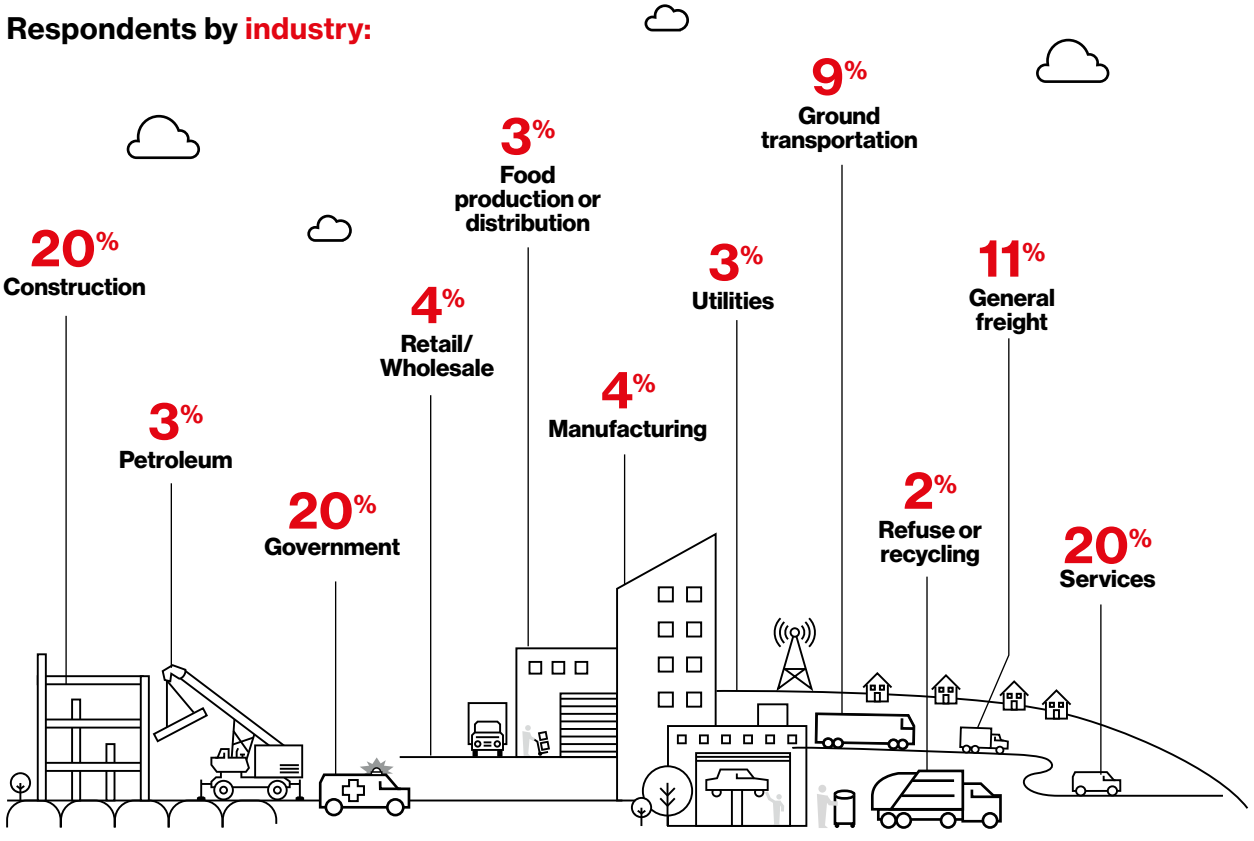
Respondents by fleet size:



Respondents by job function:

Fleet manager	32%
Finance	30%
Risk/safety	21%
Management	10%
Executive	7%

Respondents by industry:



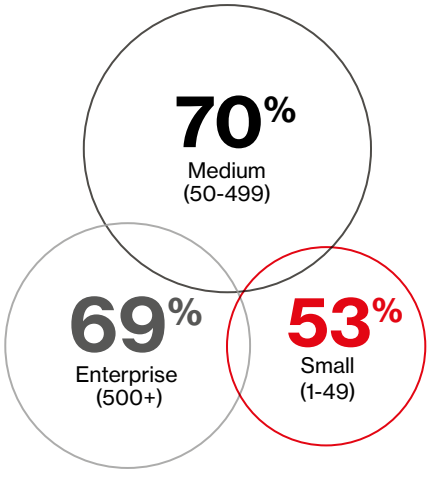
Who uses fleet management systems in Europe?

Overall, 68% of all respondents currently utilise GPS fleet tracking software in 2021 in Europe.

The average fleet size for all respondents in this survey was 138. These fleets comprise of various type of vehicles.

Trailers	**9 vehicles**
Light-duty trucks	**21 vehicles**
Heavy-duty trucks	**24 vehicles**
Cars	**53 vehicles**
Medium-duty trucks	**22 vehicles**
Off-road equipment	**9 vehicles**

Use of GPS fleet tracking by business size:



Use of GPS fleet tracking by industry:

Ground Transportation

GPS tracking:	**77%**
In-cab video:	**40%**
Asset/Trailer/ Equipment tracking:	**42%**
Field Service Management:	**49%**

Services

GPS tracking:	**69%**
In-cab video:	**39%**
Asset/Trailer/ Equipment tracking:	**37%**
Field Service Management:	**43%**

Government

GPS tracking:	**68%**
In-cab video:	**28%**
Asset/Trailer/ Equipment tracking:	**31%**
Field Service Management:	**34%**

Construction

GPS tracking:	**79%**
In-cab video:	**40%**
Asset/Trailer/ Equipment tracking:	**32%**
Field Service Management:	**37%**

General freight

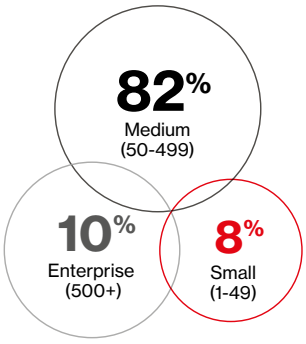
GPS tracking:	**50%**
In-cab video:	**43%**
Asset/Trailer/ Equipment tracking:	**45%**
Field Service Management:	**43%**

Looking at the use of the GPS fleet tracking by industry, it is not surprising that **construction and ground transportation** lead the way in utilisation. However, the retail industry, manufacturing and distribution are growing and showing that the implementation of this technology is consolidating in Europe.

Who uses fleet management systems country per country?

Ireland

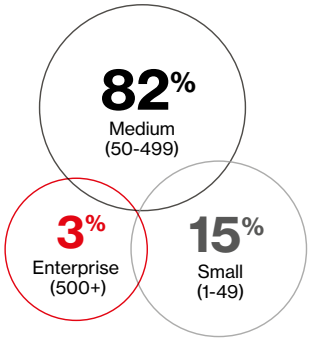
The average fleet size for all Irish respondents in this survey was 130 vehicles.



These fleets are composed of various vehicle types	
Trailers	6
Light-duty trucks	19
Heavy-duty trucks	18
Cars	59
Medium-duty trucks	20
Off-road equipment	7

Portugal

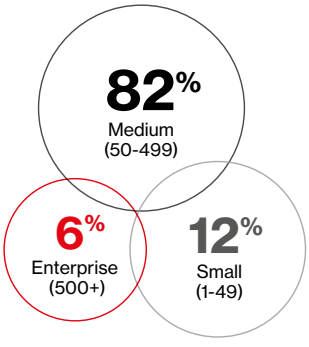
The average fleet size for all Portuguese respondents in this survey was 91 vehicles.



These fleets are composed of various vehicle types	
Trailers	3
Light-duty trucks	10
Heavy-duty trucks	5
Cars	64
Medium-duty trucks	6
Off-road equipment	3

Spain

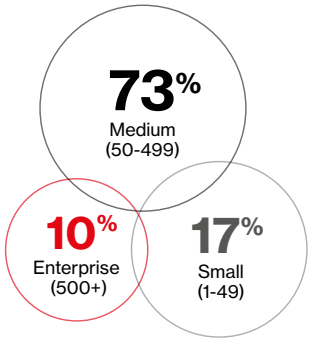
The average fleet size for all Spanish respondents in this survey was 100 vehicles.



These fleets are composed of various vehicle types	
Trailers	9
Light-duty trucks	16
Heavy-duty trucks	15
Cars	39
Medium-duty trucks	16
Off-road equipment	6

United Kingdom

The average fleet size for all British respondents in this survey was 127 vehicles.

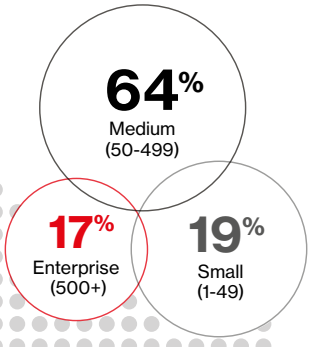


These fleets are composed of various vehicle types

Trailers	13
Light-duty trucks	18
Heavy-duty trucks	12
Cars	56
Medium-duty trucks	17
Off-road equipment	9

France

The average fleet size for all French respondents in this survey was 243 vehicles.



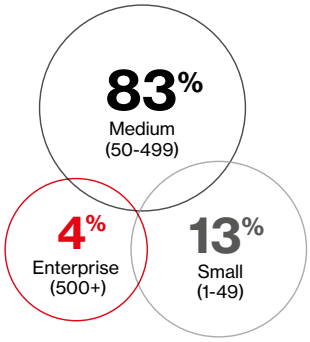
These fleets are composed of various vehicle types

Trailers	12
Light-duty trucks	31
Heavy-duty trucks	36
Cars	105
Medium-duty trucks	42
Off-road equipment	15

Who uses fleet management systems country per country?

Belgium

The average fleet size for all Belgian respondents in this survey was 100 vehicles.

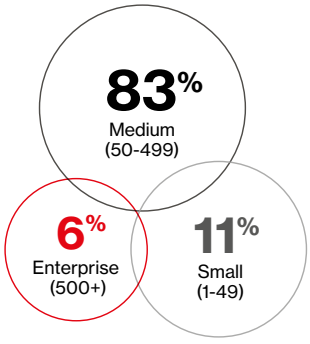


These fleets are composed of various vehicle types

Trailers	6
Light-duty trucks	18
Heavy-duty trucks	22
Cars	34
Medium-duty trucks	13
Off-road equipment	7

The Netherlands

The average fleet size for all Dutch respondents in this survey was 162 vehicles.

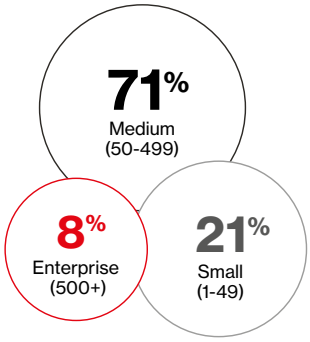


These fleets are composed of various vehicle types

Trailers	10
Light-duty trucks	26
Heavy-duty trucks	52
Cars	28
Medium-duty trucks	38
Off-road equipment	9

Italy

The average fleet size for all Italian respondents in this survey was 172 vehicles.

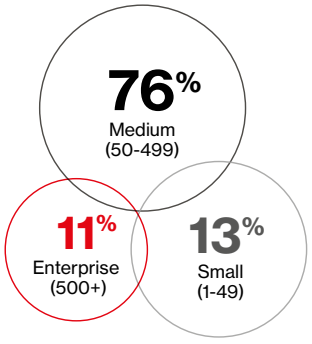


These fleets are composed of various vehicle types

Trailers	6
Light-duty trucks	29
Heavy-duty trucks	24
Cars	77
Medium-duty trucks	27
Off-road equipment	10

Germany

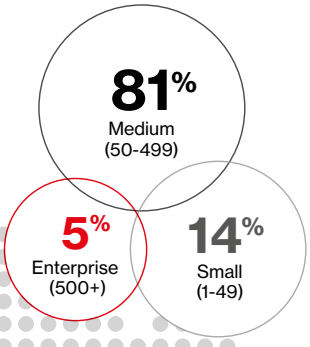
The average fleet size for all German respondents in this survey was 137 vehicles.



These fleets are composed of various vehicle types	
Trailers	13
Light-duty trucks	21
Heavy-duty trucks	21
Cars	49
Medium-duty trucks	20
Off-road equipment	13

Poland

The average fleet size for all Polish respondents in this survey was 111 vehicles.



These fleets are composed of various vehicle types	
Trailers	10
Light-duty trucks	23
Heavy-duty trucks	24
Cars	24
Medium-duty trucks	21
Off-road equipment	10

Does fleet tracking technology impact ROI?

Increased improvements in key areas for business, such as customer service, regulatory compliance, routing and productivity.

Decreases in fuel consumption, accidents, vehicle maintenance or labour costs can help businesses to be more competitive in the market.

The majority of respondents from all the top 5 sectors achieved a positive ROI in less than a year after implementing GPS fleet tracking.

Positive improvements after implementing GPS fleet tracking 2021:

Improved customer service	56%
Tachograph compliance	43%
Improved routing	45%
Improved productivity	45%
Decrease in fuel consumption	52%
Decrease in accidents	43%
Improved vehicle maintenance	36%
Decrease in labour costs	27%

Timeframe to achieve positive ROI:	One year or less	More than one year
Services	78%	20%
Ground Transportation	97%	3%
Construction	93%	6%
Government	74%	17%
General Freight	94%	6%

How technology fuels a competitive edge

A majority of respondents across industries said GPS fleet tracking has had an impact on their fleet operations- **78% consider fleet tracking "extremely" or "very" beneficial.**

Within the Services industry, **54%** of those currently using a GPS fleet tracking solution realised reduced fuel consumption. This is essential as many businesses are finding it crucial to lower costs in every business day. Rising customer expectations help differentiate business and help engage customers.

Other goals realised that can help companies get a leg up on the competition include vehicle maintenance, improved regulatory compliance, improved routing, improved productivity (including number of jobs and vehicle utilisation) and decreased labour costs.

Services industry

Goals achieved since implementing GPS tracking

54%
decrease in fuel consumption

31%
improved productivity (for example, number of jobs, vehicle utilisation)

41%
decrease in accidents

42%
tachograph/regulatory compliance

53%
improved customer service

56%
improved vehicle maintenance

38%
decrease in labour costs

48%
improved routing

The majority of respondents for all the industries were also able to achieve critical business goals

Construction industry

Goals achieved since implementing GPS tracking

49%
decrease in fuel consumption

51%
improved productivity (for example, number of jobs, vehicle utilisation)

37%
decrease in accidents

35%
ELD/regulatory compliance

18%
decrease in labour costs

36%
improved routing

61%
said they achieved improved customer service and 51% improved productivity in terms of number of jobs and vehicle utilisation.

61%
improved customer service

37%
improved vehicle maintenance

The general freight industry, the majority of respondents improved their customer experience

General freight

Goals achieved since implementing GPS tracking

36%
decrease in fuel consumption

52%
improved productivity (for example, number of jobs, vehicle utilisation)

44%
decrease in accidents

57%
ELD/regulatory compliance

62%
improved customer service

36%
improved vehicle maintenance

25%
decrease in labour costs

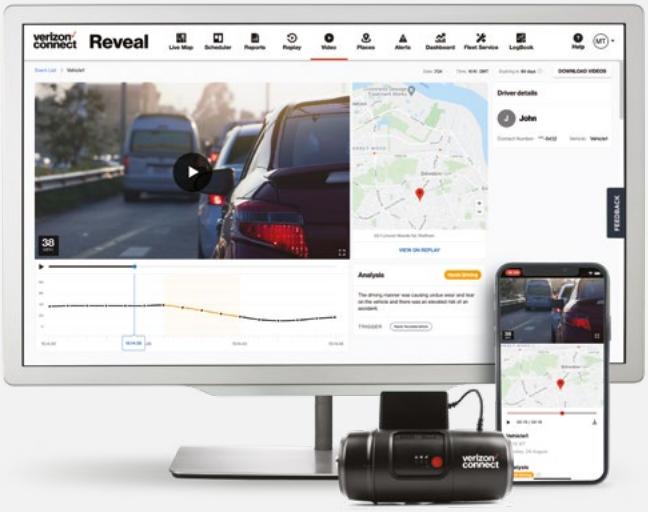
51%
improved routing

Video telematics: smart solutions to help protect your drivers and deliver tangible results

AI-backed video telematics with driver-facing and road-facing cameras is reshaping safety and efficiency for fleets. Fleet businesses are able to see how smart video can serve as an unbiased witness, an incomparable driver training tool and a gold mine of data.

Of those using in-cab video solution:

- **71%** improved driver safety.
- In the ground transportation industry, **83%** of respondents considered in-cab video “very” or “extremely” beneficial.
- In the services industry, **70%** saw a reduction in false claims.



Goals achieved from implementing smart video

Improved driver safety

67%

Reduced false claims

54%

Reduced accident costs

57%

Reduced insurance costs

47%

79% consider in-cab video “**extremely**” or “**very beneficial**” in all of the industries.

For those in the **services industry** using in-cab video, **78%** improved driver safety.

70% improved protection from false claims.

56% reduced accidents costs.

50% also saw reduced insurance costs.

Furthermore, In the services industry, more than **76%** considered “extremely” or “very beneficial” in **all the industries.**

Asset tracking technology empowers safety, equipment utilisation and team productivity

A majority of businesses across industries said asset tracking has had a beneficial effect on their business operations. **73%** consider asset tracking "extremely beneficial" or "very beneficial".

Within the construction industry, **67%** of those currently using an asset tracking solution realised improved equipment and trailer utilisation.

Also, **52%** improved equipment and trailer security.

Other goals that can help give companies a competitive edge include improved productivity and efficiency across the company teams, like drivers, workers and office staff - which is key.

Goals achieved since implementing asset tracking

Improved equipment/ trailer utilisation

61%

Improved equipment/ trailer security

51%

Reduced insurance costs

49%

Improved efficiency/ productivity drivers/workers

54%

Improved efficiency productivity for office staff/ management

46%

73% consider asset tracking "extremely" or "very beneficial" in all of the industries

Construction industry

Goals achieved since implementing Asset tracking

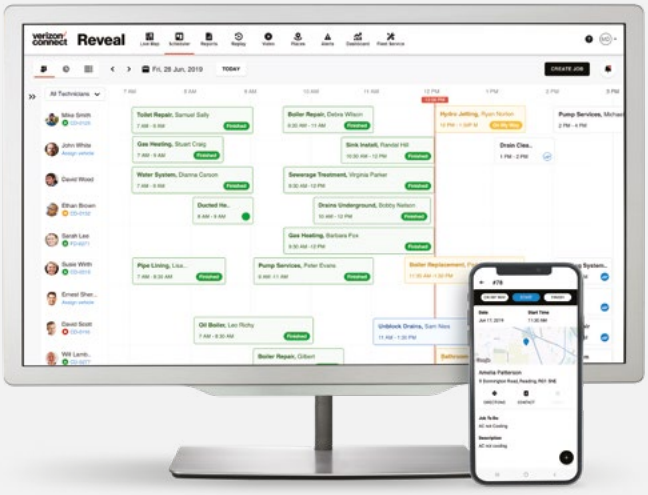
Improved equipment/trailer utilisation	67%
Improved equipment/trailer security	45%
Reduced insurance costs	40%
Improved efficiency/productivity drivers workers	52%
Improved efficiency productivity for office staff/management	39%

Field service management solution helps build a better customer experience

A large majority of respondents across all industries said that field service management has had a beneficial effect on their business operations. **80%** consider field service management "**extremely beneficial**" or "**very beneficial**".

Within the services industry **52%** of those currently using field service solutions realised improved scheduling. Also, **56%** improved office efficiency.

Other goals that can help give companies a competitive edge include improved communication with customers and technicians. And, 38% have achieved better visibility into the near-real time location of their technicians.



Services industry

Goals achieved since implementing Field service solution

Improved scheduling

66%

Improved office efficiency

63%

More jobs per technician

50%

Improved communication with technicians

59%

Improved communication with customers

69%

Improved visibility into near real-time location of technicians

53%

Undeniable cost savings

According to our survey, 70% of businesses said that increased costs was one of the biggest business challenges (extremely or very impactful) followed by fuel (69%), meeting customers' expectations (63%) and labour costs (63%). Users of fleet tracking technology have shown remarkable benefits in these and other KPIs.

Across all industries GPS tracking users decreased fuel costs by an average of **8%**. Users also saw an average decrease of **15%** in accident costs and a decrease in overall labour costs of **12%**.




	All industries	Trans-portation	Government	Construction	Services
Fuel cost reduction	8%	7%	8%	7%	8%
Accident cost reduction	15%	14%	14%	15%	15%
Labour cost reduction	12%	13%	12%	13%	12%

In the services industry, 54% of respondents decreased their fuel consumption. Also, 56% improved their vehicle maintenance which is a potential benefit of GPS fleet tracking technology to help keep vehicles well maintained and in optimal condition. 53% saw improved customer service and 48% saw improved routing as potential benefits. 41% saw a decrease in accidents and 38% saw a reduction in labour cost.

A picture of GPS fleet tech implementation in Europe

Which of the following fleet technologies do you currently utilise?

Spain

GPS tracking	71%
In cab video (including front facing and driver facing cameras)	32%
Asset/Trailer/Equipment tracking	34%
Field Service Management (scheduling, dispatch, communication)	36%

United Kingdom

GPS tracking	73%
In cab video (including front facing and driver facing cameras)	58%
Asset/Trailer/Equipment tracking	44%
Field Service Management (scheduling, dispatch, communication)	55%

Ireland

GPS tracking	60%
In cab video (including front facing and driver facing cameras)	38%
Asset/Trailer/Equipment tracking	30%
Field Service Management (scheduling, dispatch, communication)	30%

France

GPS tracking	60%
In cab video (including front facing and driver facing cameras)	26%
Asset/Trailer/Equipment tracking	25%
Field Service Management (scheduling, dispatch, communication)	37%

Germany

GPS tracking	68%
In cab video (including front facing and driver facing cameras)	37%
Asset/Trailer/Equipment tracking	41%
Field Service Management (scheduling, dispatch, communication)	39%

Italy

GPS tracking	74%
In cab video (including front facing and driver facing cameras)	36%
Asset/Trailer/Equipment tracking	39%
Field Service Management (scheduling, dispatch, communication)	45%

The Netherlands

GPS tracking	73%
In cab video (including front facing and driver facing cameras)	49%
Asset/Trailer/Equipment tracking	46%
Field Service Management (scheduling, dispatch, communication)	59%

Belgium

GPS tracking	57%
In cab video (including front facing and driver facing cameras)	42%
Asset/Trailer/Equipment tracking	32%
Field Service Management (scheduling, dispatch, communication)	39%

Portugal

GPS tracking	73%
In cab video (including front facing and driver facing cameras)	25%
Asset/Trailer/Equipment tracking	25%
Field Service Management (scheduling, dispatch, communication)	29%

Poland

GPS tracking	64%
In cab video (including front facing and driver facing cameras)	42%
Asset/Trailer/Equipment tracking	46%
Field Service Management (scheduling, dispatch, communication)	42%

Map of goals achieved since implementing GPS fleet tracking in Europe

What goals have you achieved since implementing your GPS fleet tracking solution?

Spain

Decrease in fuel consumption	55%
Improved productivity (e.g. number of jobs, vehicle utilisation)	50%
Decrease in accidents	46%
Tachograph/regulatory compliance	48%
Improved customer service	57%
Improved vehicle maintenance	36%
Decrease in labour costs	26%
Improved routing	51%

United Kingdom

Decrease in fuel consumption	56%
Improved productivity (e.g. number of jobs, vehicle utilisation)	45%
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Tachograph/regulatory compliance	36%
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Improved routing	63%

France

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Decrease in accidents	51%
Tachograph/regulatory compliance	37%
Improved customer service	41%
Improved vehicle maintenance	46%
Decrease in labour costs	19%
Improved routing	48%

Germany

Decrease in fuel consumption	58%
Improved productivity (e.g. number of jobs, vehicle utilisation)	35%
Decrease in accidents	48%
Tachograph/regulatory compliance	47%
Improved customer service	56%
Improved vehicle maintenance	51%
Decrease in labour costs	27%
Improved routing	45%

Italy

Decrease in fuel consumption	48%
Improved productivity (e.g. number of jobs, vehicle utilisation)	46%
Decrease in accidents	40%
Tachograph/regulatory compliance	50%
Improved customer service	51%
Improved vehicle maintenance	50%
Decrease in labour costs	35%
Improved routing	40%

The Netherlands

Decrease in fuel consumption	50%
Improved productivity (e.g. number of jobs, vehicle utilisation)	45%
Decrease in accidents	36%
Tachograph/regulatory compliance	41%
Improved customer service	57%
Improved vehicle maintenance	47%
Decrease in labour costs	27%
Improved routing	48%

Belgium

Decrease in fuel consumption	51%
Improved productivity (e.g. number of jobs, vehicle utilisation)	42%
Decrease in accidents	40%
Tachograph/regulatory compliance	34%
Improved customer service	59%
Improved vehicle maintenance	55%
Decrease in labour costs	30%
Improved routing	34%

Portugal

Decrease in fuel consumption	60%
Improved productivity (e.g. number of jobs, vehicle utilisation)	46%
Decrease in accidents	41%
Tachograph/regulatory compliance	39%
Improved customer service	67%
Improved vehicle maintenance	45%
Decrease in labour costs	29%
Improved routing	46%

Poland

Decrease in fuel consumption	45%
Improved productivity (e.g. number of jobs, vehicle utilisation)	54%
Decrease in accidents	47%
Tachograph/regulatory compliance	54%
Improved customer service	65%
Improved vehicle maintenance	48%
Decrease in labour costs	18%
Improved routing	43%

Map of timeframe on ROI in Europe

How long did it take to realise a return on investment (ROI) on your GPS fleet tracking solution?

Spain

Less than 3 months	11%
Between 3 and 6 months	31%
Between 7 and 12 months	42%

Ireland

Less than 3 months	20%
Between 3 and 6 months	17%
Between 7 and 12 months	57%

Belgium

Less than 3 months	18%
Between 3 and 6 months	26%
Between 7 and 12 months	41%

Germany

Less than 3 months	8%
Between 3 and 6 months	26%
Between 7 and 12 months	52%

Italy

Less than 3 months	17%
Between 3 and 6 months	24%
Between 7 and 12 months	43%

United Kingdom

Less than 3 months	5%
Between 3 and 6 months	38%
Between 7 and 12 months	33%

France

Less than 3 months	13%
Between 3 and 6 months	40%
Between 7 and 12 months	40%

Portugal

Less than 3 months	17%
Between 3 and 6 months	25%
Between 7 and 12 months	43%

The Netherlands

Less than 3 months	6%
Between 3 and 6 months	38%
Between 7 and 12 months	37%

Poland

Less than 3 months	22%
Between 3 and 6 months	32%
Between 7 and 12 months	39%

The bottom line

Building a resilient business is more important now than ever before. Use these data points to make long-term purposeful decisions that will help your fleet withstand the complex business environment or any other emergency in the future.

Fleet tracking technology goes beyond just dots on a map. It gives fleet managers much-needed visibility into driver behaviours, fuel costs and vehicle wear and tear. With dashboards and customisable reports, you can check the pulse of your business at any point in time.

Methodology of the survey

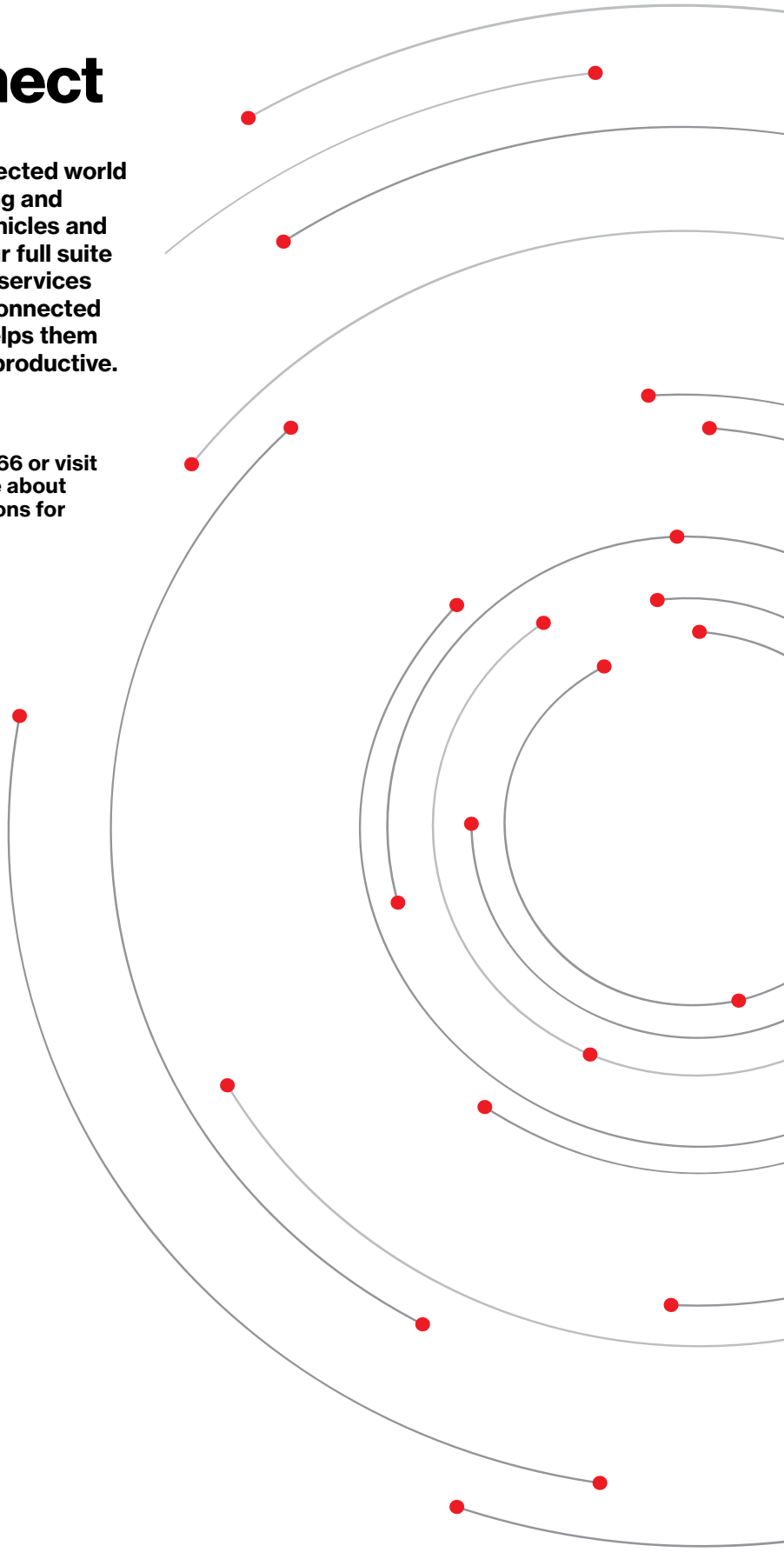
Conducted by ABI Research for Verizon Connect, this study aims to dive deeper into the understanding and adoption of GPS fleet tracking systems and other related technologies.

This report, based on surveys completed by more than 1,350 European fleet managers, executives and other mobile-business professionals highlights the value fleet businesses are achieving by investing in fleet tracking technology.

About Verizon Connect

Verizon Connect is guiding a connected world on the go by automating, enhancing and revolutionising the way people, vehicles and things move through the world. Our full suite of industry-defining solutions and services puts innovation, automation and connected data to work for customers and helps them be safer, more efficient and more productive.

Connect your fleet. Call 0800 975 4566 or visit verizonconnect.com/uk to learn more about our powerful, easy-to-use fleet solutions for businesses of all sizes.



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