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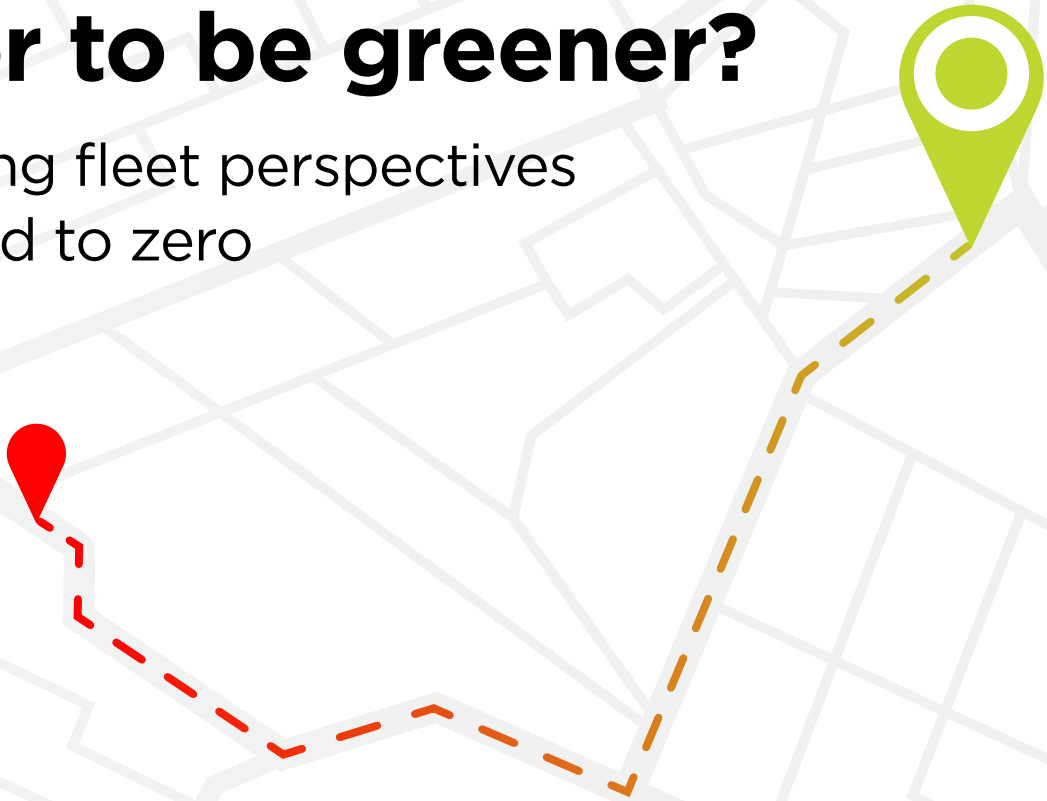
Keener to be greener?

Researching fleet perspectives on the road to zero



Andrea Manenti,
Vice President North Region,
Bridgestone EMIA

Green intentions?

Saving our planet – the greatest environmental challenge of our time – calls for transformational change.

More than 130 countries have pledged to reach net zero emissions by the middle of this century, with the UK enshrining its commitment in law. But the scale and scope of transitioning to a carbon neutral society is huge, meaning we all have to do things differently across all areas of our economy.

The decarbonisation of transport, the UK's biggest contributor to greenhouse gas emissions, remains front and centre of our pathway to net zero and all stakeholders in the transport ecosystem have a role to play.

Public policy and regulation are integral to the solution, but so too are science, technology, end-user consumers and businesses, industry and innovation.

Change is underway, but we are just at the start of our journey and the choices we make today will determine our future.

What will make the biggest difference? How can change be accelerated? Does the government 'greenprint' marry with the ambitions and expectations of transport decision-makers? What are the priorities for fleets and can businesses decarbonise while remaining competitive? How is technology best deployed?

This study takes the pulse of fleet operators at the metaphorical coalface and gives them a voice on some of these key sustainability issues.

By improving our understanding of the industry's attitudes, ambitions, motivations and concerns, we are better able to collaborate to achieve our existential goal of tackling climate change.

About the research

The research was conducted among 300 UK fleet decision-makers (150 responsible for van fleets; 150 responsible for HGV fleets) in March 2022 through online and mobile polling by research consultancy OnePoll.

The percentage figures detailed in this report represent those survey respondents who gave a definitive answer (e.g. yes/no or agree/disagree).

Key takeaways

A LITTLE MORE ACTION PLEASE

Businesses are confident the UK can meet its net zero target – but more must be done by the government.

58%

believe the UK will be net zero by 2050.

31%

of HGV-only fleet operators are optimistic the 2040 end-of-sale date for new diesel trucks can be met.

62%

say government must increase green transport spend.

60%

say more business support is needed.

ARE YOU READY FOR THIS?

Decarbonisation is the number one priority for commercial fleets, cited by 45% of businesses – and **more than half (53%) have a robust strategy to become carbon neutral.**

Over the next 12 months, **43% of HGV operators plan to invest in alternative fuel vehicles and 36% of van fleets in EVs.** Furthermore, **39% of both HGV and van fleets will invest in energy efficient tyres.**

On average, however, decision-makers believe **it will be more than eight years before their fleets are fully carbon neutral** – 7.5 years for HGV operators and 8.7 years for van fleets.

More than half of HGV operators (59%) think high energy prices will dampen demand for EVs, while **more than two-thirds (68%) are also concerned about the cost impact of Clean Air Zones.**

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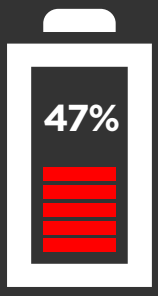
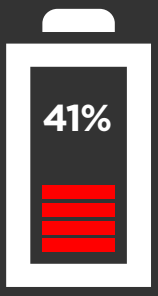
ANOTHER HURDLE APPROACHING...



The lack of specialist EVs for different businesses is the number one barrier to EV adoption, according to 47% of fleets.



Closely followed by a lack of rapid charging infrastructure (41%).

Transport decarbonisation also risks being held back by competing business interests, according to more than half of fleets (56%), while **60% cite the need for a cultural shift within their company for it to be embraced by all business stakeholders.**

HANDS ON THE WHEEL?

Almost two-fifths (39%) of LCV fleets and **29% of HGV fleets** say their current tech is insufficient to help manage their carbon footprint.

One in five (20%) do not measure their carbon footprint.

More than a third (34%) would not be confident calculating an EV fleet's TCO.

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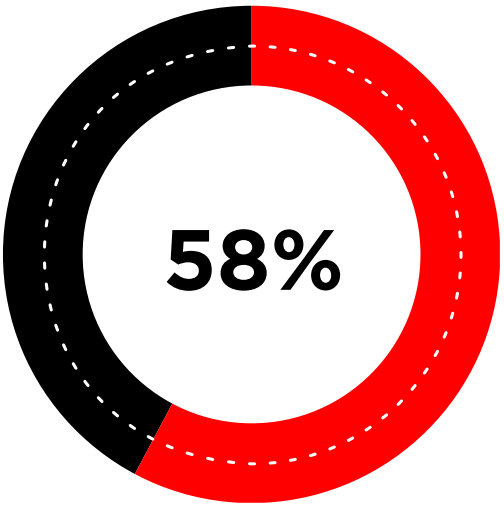
Q1

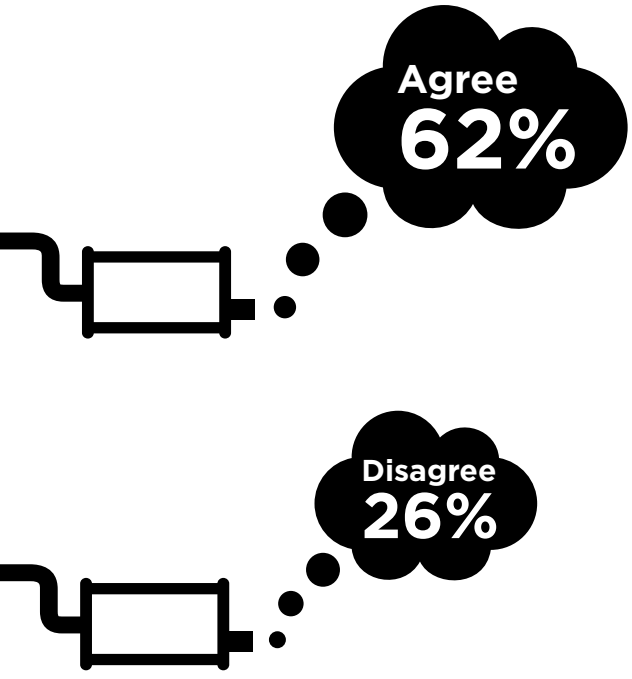
I am confident the UK will meet its net zero target, for all sectors of the economy, by 2050 (agree/disagree)

The UK has enshrined in law a commitment to reduce greenhouse gas emissions to net zero by 2050. As part of its pledge, the government is set to ban new petrol and diesel vans from 2030 and fossil fuel HGVs by 2040.

More than half of fleet businesses (58%) feel confident its net zero target will be met.



Q2



The government must increase investment in transport decarbonisation and green transport initiatives in order to meet its transport sustainability targets (agree/disagree)

The government has set out its plans to decarbonise UK transport and has invested in an array of initiatives. But is it doing enough?

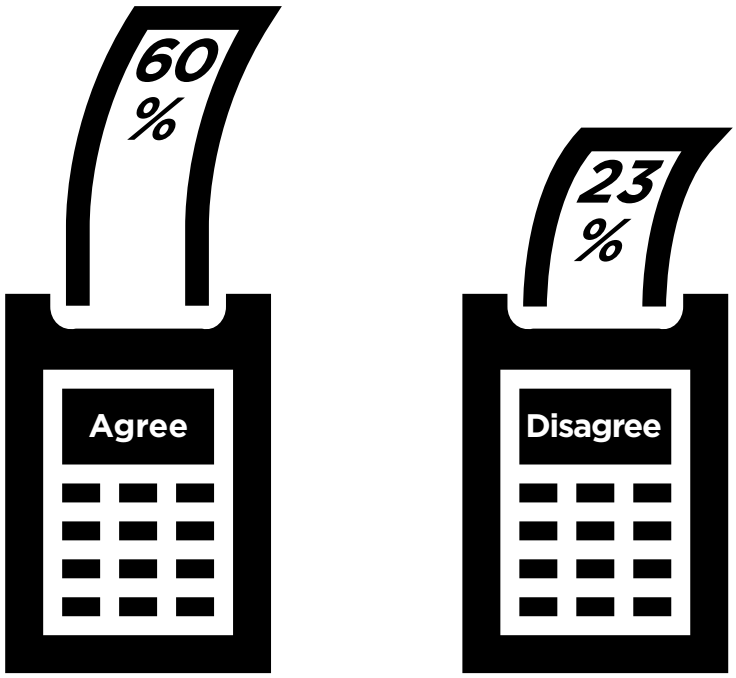
Almost two-thirds of fleets believe more investments must be made if its sustainability targets are to be met.

Q3

The government should make greater financial support and guidance available to commercial fleet businesses to create a net zero transport sector (agree/disagree)

Decarbonising a vehicle fleet and making the transition to electric vehicles can represent a significant change management undertaking.

Almost two-thirds of fleet decision-makers (60%) think the government should make greater financial support and guidance available to businesses to support the drive to net zero.



Q4

What is your personal motivation, if any, behind greening your fleet?

Alongside the clear business impetus to decarbonise, fleet decision-makers also harbour strong personal motivations, with 61% wanting to protect their health, that of their family and the next generation.

The same number said they wanted to support their career progression while more than half (57%) said they wanted to help save the planet.

61%

To protect my own and my family's health, and the health of the next generation.

61%

To support my career progression by staying ahead of the curve.

57%

To contribute to saving the planet.

Q5

The reputational benefit of a having a sustainable fleet would lead to an increase in business for our company

(agree/disagree)

More than half (57%) of respondents believe running a green fleet would lead to an increase in business, with more hauliers (61%) recognising this benefit than their LCV fleet counterparts (52%).

HGVs

Agree 61%

Disagree 20%

LCVs

Agree 52%

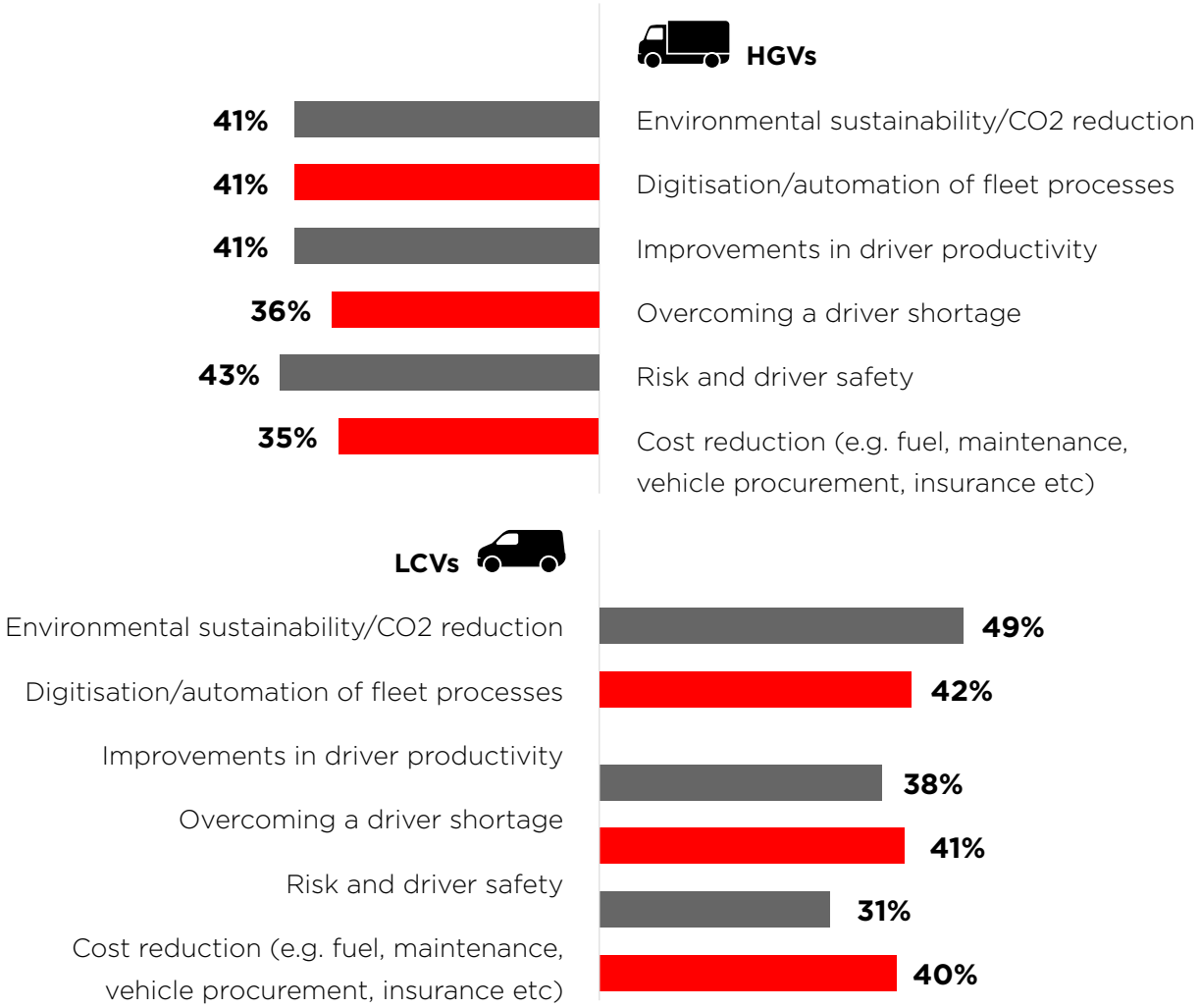
Disagree 29%

Q6

Which of the following are your company's fleet management priorities over the next 12 months?

While environmental sustainability is the top priority for all commercial fleets (cited by 45% of businesses), it was knocked off the number one spot among HGV operators by risk and driver safety considerations. This may come as little surprise given the strict regulatory compliance obligations facing hauliers.

Perhaps more surprising is the larger number of van fleets (41%), compared to HGV fleets (36%), citing the challenge of overcoming a driver shortage. The HGV driver shortage crisis, however, has eased while the ecommerce market, and associated delivery demands, continues its upward trajectory.



Q7

Which of the following are you planning to invest in over the next 12 months?

Over the next 12 months, 43% of HGV operators plan to invest in alternative fuel vehicles and 36% of van fleets in EVs. Furthermore, 39% of both HGV and van fleets will invest in energy-efficient tyres.

While battery-powered cars and vans are now commonplace on UK roads, the same cannot be said for electric trucks, with battery and range requirements making HGVs more difficult to electrify. It may come as a surprise, therefore, that more than a third (35%) of HGV fleets say that they are planning to invest in EVs over the next year, despite the electrification challenge.

Alongside their commitment to alternative fuel vehicles, it is perhaps less surprising that driver training topped the list of planned investment for HGV fleets, given the 2021 driver shortage. For LCV fleets, telematics came top, with four in ten (41%) preparing to install the technology.

HGVs

43% Driver training

43% Alternative fuel vehicles e.g. biofuel

39% Energy-efficient tyres

37% Improved fleet maintenance initiatives

35% Telematics

35% EVs

LCVs

38% Driver training

31% Alternative fuel vehicles e.g. biofuel

39% Energy-efficient tyres

35% Improved fleet maintenance initiatives

41% Telematics

36% EVs

Q8

My company has a robust strategy for having a carbon neutral fleet (agree/disagree)

Less than half of van fleets said they currently have a 'robust' net zero carbon emission strategy. This contrasts sharply with almost two-thirds (62%) of HGV fleets.

Opportunities for fleet electrification may currently be greater in the LCV sector but with typical HGV lifecycles of around 12 years, supply chain pressures and policies such as the roll out of Clean Air Zones (CAZs) having a notable impact on HGV operators, the need for long-term, cost-effective planning for hauliers is clear.

HGV fleet:

Agree: 62%

Disagree: 27%

Van fleet:

Agree: 45%

Disagree: 41%

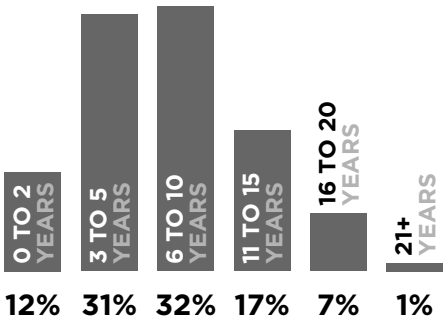
Q9

When do you anticipate your entire fleet being fully carbon neutral, through switching to EVs or alternative carbon neutral fuels?

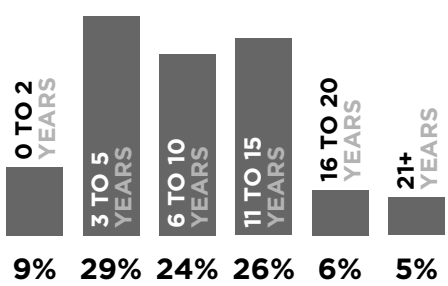
The carbon neutral commitment among HGV operators, who operate in a strict regulatory compliance environment, is further reinforced by the revelation that almost half (43%) expect to be carbon neutral within five years compared to 39% of van fleets.

On average, fleet decision-makers believe it will be more than eight years (8.1) before their fleets will be fully carbon neutral.

HGVs



LCVs



Q10

What do you believe will become the dominant technology for low/zero carbon HGVs?

There are a number of greener alternative fuels available for HGVs, but no-one is yet sure which will become most used post-2040. There is no notable frontrunner amongst HGV fleet managers either, with a relatively equal split between the leading alternatives.

HGVs

27%
E-diesel (carbon neutral synthetic diesel)

27%
Hydrogen fuel cells

23%
Battery-electric

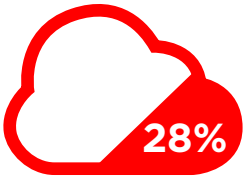
23%
Biofuels

Q11

How concerned are you about the impact of Clean Air Zones on fleet running costs?

Clean Air Zones (CAZs) can have a real impact on HGVs, so the fact that more truck operators are worried about the cost implications is understandable, especially as more launches are planned in the months ahead.

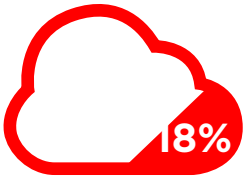
HGVs



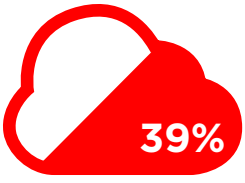
Very concerned

Somewhat concerned

LCVs



Very concerned



Somewhat concerned

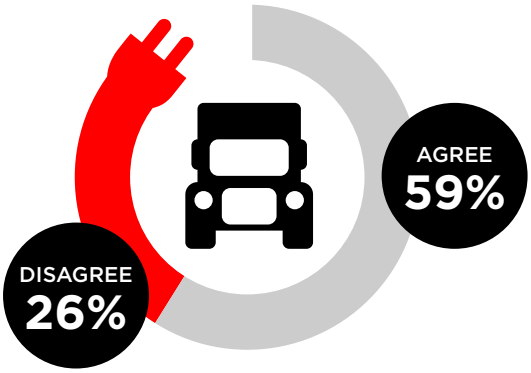
Q12

High energy prices will dampen demand among businesses for electric vehicles (agree/disagree)

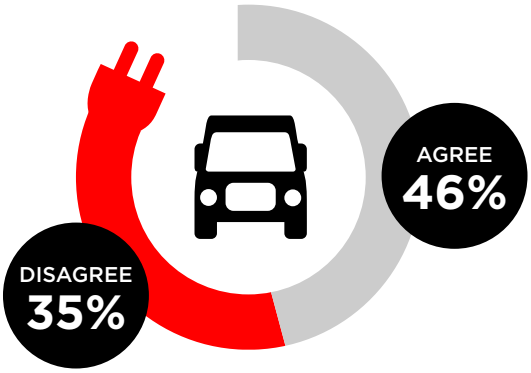
Energy prices across the UK are soaring and for businesses with EVs, this means an impact on the bottom line.

More HGV fleet operators (59%) than van operators (46%) believe the increase in energy costs will dampen demand for EVs, perhaps due to the higher energy demands of electric trucks.

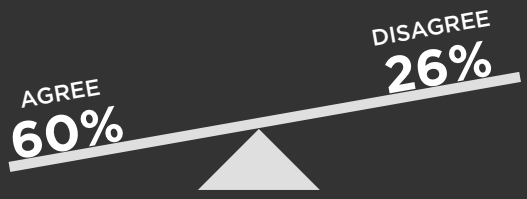
HGVs



LCVs



Q13



A cultural shift is needed within the business for all company stakeholders – from senior management to drivers – to embrace fleet decarbonisation (agree/disagree)

Having a net zero policy may not always be enough to effectively transition to EVs or low carbon vehicles. A sympathetic business culture can help ensure all company stakeholders are on board.

Almost two-thirds (60%) of fleets believe a cultural shift is needed within their organisations.

Q14

Transport decarbonisation is being held back by competing interests within the business, e.g. short term financial goals, strategic or investment priorities

(agree/disagree)

Decarbonisation is not just a fleet manager responsibility. Different company departments – from fleet, finance and HR to operations, sales and marketing – can have competing business priorities.

Indeed, more than half of fleet decision-makers (56%) believe this is acting as an impediment to the decarbonisation agenda.

Q15

Does your company measure its fleet's carbon footprint?

Measuring a fleet's carbon footprint is not only a way to reduce vehicle emissions, but also a chance for businesses to make significant cost savings.

However, one in five fleets admit to not making this calculation.

Yes	No	HGVs - no	LCVs - no
73%	**20%**	**20%**	**19%**

Automated reporting	Mathematical estimate	Other
52%	**45%**	**3%**

Q16

If you measure your fleet's carbon footprint, how is this done?

Almost half (45%) of those surveyed do not use technology to calculate their fleet's carbon footprint, instead choosing to manually work out an estimated figure. Unlike automated reporting, this does not give fleets an accurate number to work with or highlight the areas where changes should be made to reduce emissions.

Q17

How confident are you/would you be in calculating the TCO (total cost of ownership) of an electric vehicle fleet?

Calculating TCO enables fleet businesses to drive efficiencies, as well as manage and reduce costs. While many fleet managers will be well-versed in making the calculation for ICE vehicles, what about for EVs?

Almost a third (32%) of fleet managers are very confident they could undertake the task, while one in ten aren't confident at all. Interestingly, confidence is higher amongst HGV fleet operators, with 35% very confident compared to 28% of LCV fleet operators.

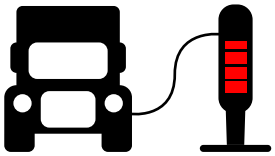
Very confident
32%

Somewhat confident
34%

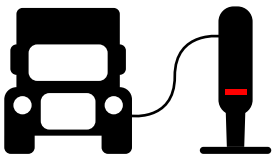
Not very confident
24%

Not at all confident
10%

HGVs

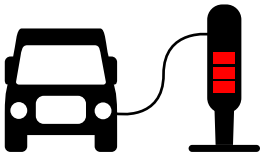


Very confident
35%

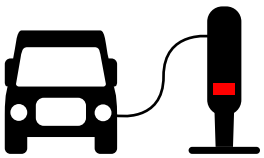


Not at all confident
7%

LCVs



Very confident
28%



Not at all confident
12%

Q18

The technology we use is sufficient in helping manage the environmental impact of our fleet

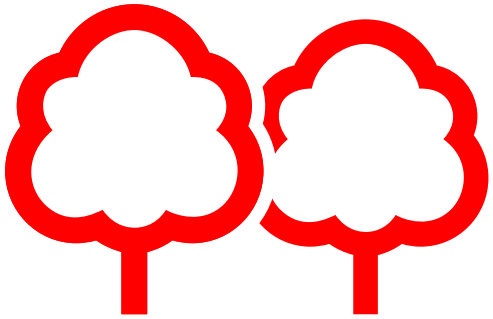
(agree/disagree)

According to the research, a large number of fleets do not have effective technology systems in place to help manage their carbon footprint, with almost two-fifths (39%) of LCV fleets and 29% of HGV fleets believing their current tech falls short.

HGVs

Agree	Disagree
54%	**29%**

LCVs



Agree	Disagree
41%	**39%**

Q19

Which of the following do you believe are the biggest barriers to commercial fleet electrification?

ICE vehicle bans are just around the corner but, according to our survey, fleet managers believe there is still a long way to go before all fleets will readily make the EV switch.

The lack of specialist EVs for different business uses was cited as the number one barrier to EV adoption (chosen by 47% of respondents), followed by the lack of rapid charging infrastructure (41%) and resistance from drivers (40%).

Availability of specialist EV vehicles for your business use (e.g. 4x4, vehicles housing power generators, refrigeration units, heavy payload or towing requirements)

47%

A lack of rapid-charging infrastructure

41%

Driver resistance

40%

A lack of productivity (time lost to vehicle charging, charging-related activities and EV maintenance)

38%

A lack of internal EV expertise

37%

Cost

35%

Q20

The 2040 end-of-sale date for new diesel trucks does not give the industry enough time to develop viable alternatives for all business uses e.g. long-haul journeys with heavy loads (agree/disagree)

All new road vehicles in the UK are set to be zero emission, with HGVs the last in line to be given a phase-out date. But what do HGV fleet managers think of the 2040 deadline?

More than half (54%) think the date will come too soon for manufacturers to develop specialist electric trucks, yet almost a third (31%) are optimistic the target can be met.

HGVs

Agree

54%

Disagree

31%

The data route to realising transport's electric dreams

Telematics solutions have an increasingly important role to play in helping shape fleet EV strategies. Businesses need critical data insights to help them make the right decisions at the right times – both for EV procurement and for their ongoing management.

At the heart of WEBFLEET's EV solution is the **Fleet Electrification Planning Report**, which can help signpost a fleet's true EV potential by enabling fleet decision-makers to identify the internal combustion engine (ICE) vehicles that could be replaced with EV alternatives.

Valuable insights into the charging process and vehicle charge levels are provided by a **Charger Connection Report**. This helps ensure charging occurs when tariffs are most favourable and just before vehicles are needed for operation.

The **Energy Consumption Report** provides an analysis of energy usage in kWH, per vehicle, per day. This enables fleets to compare vehicles' energy performance and identify cases of inefficient operation.

Where operational circumstances allow, it can also help ensure charge levels are maintained between the optimal 20% and 80% to minimise costly battery degradation.

Supporting the ongoing operation of EVs, workflow planning can be optimised with real-time battery levels and remaining driving ranges available for every fleet vehicle. EV health data enables pre-emptive maintenance, while on the road, the location of charging points can be pinpointed via drivers' PRO sat nav devices, with charging infrastructures detailed across more than 50 countries.

For more information about how WEBFLEET can help your business decarbonise, call **0208 822 3605** or visit **www.webfleet.com**

Reinventing the wheel to drive down CO_2

Tyres are being engineered with ever greater precision in a bid to minimise rolling resistance and maximise range, the key components to fuel and CO2 reduction.

The Nano Pro-Tech™ compound, for instance, used in Bridgestone's Ecopia and Duravis tyres, has been proven to reduce energy loss and therefore maximise range. Design details such as a low deformation pattern and slim beads and buttresses also improve tyre efficiency.

Ecopia H002

The Ecopia H002 achieves best in class fuel efficiency through an EU label A-A-A grade combination in steer, drive and trailer. An average long haul fleet would be able to make more than a €200,000 saving per year on fuel costs and reduce their CO2 emissions by 546 tonnes per year.

Duravis All Season

The Duravis All Season is aimed at the commercial van segment and is ideal for professionals who want to maximise their business efficiency and stay in control with the same tyres throughout the year. Achieving a best-in-class EU label A-grade in wet grip, the product allows fleets to keep going even in adverse weather conditions.

Duravis R002

The Duravis R002 offers up to 45% better wear life than its predecessor, while cost per kilometre is reduced by 15%.

Bridgestone is also fully committed to re-using and recycling, as well as reducing emissions. Its premium Bandag retreads support the transition to a circular economy by re-using existing tyres. A safe, reliable alternative to a new tyre, retreads deliver similar performance levels but require 70% less oil, 32kg less rubber and 14kg less steel. They also produce up to 80% less carbon emissions.

A 20% drop in tyre pressure translates to a 3% increase in fuel consumption. With the WEBFLEET TPMS (Tyre Pressure Monitoring System), both drivers and fleet managers receive real time pressure alerts, which allows them to take timely action - saving fuel (and costly downtime).

For more information on the Bridgestone range of eco tyres,
call **+44 (0)1926 488500** or visit **www.bridgestone.co.uk/truck-and-bus**

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Contact us:

Webfleet Solutions: +44 (0)208 822 3605 | webfleet.com

Bridgestone: +44 (0)1926 488500 | bridgestone.co.uk