



# CURRENT AND FUTURE MOBILITY TRENDS



# FLEET RESEARCH BACKGROUND

3<sup>rd</sup> ED. OF THE ACA FLEET  
INSIGHTS RESEARCH



BASED ON A SURVEY OF  
615 FLEET MANAGERS



WHO OPERATE ALMOST  
250K VEHICLES



SURVEY ALSO LOOKED AT THEIR USAGE OF OTHER FORMS OF EMPLOYEE MOBILITY

PERSONAL  
VEHICLES



PUBLIC  
VEHICLES



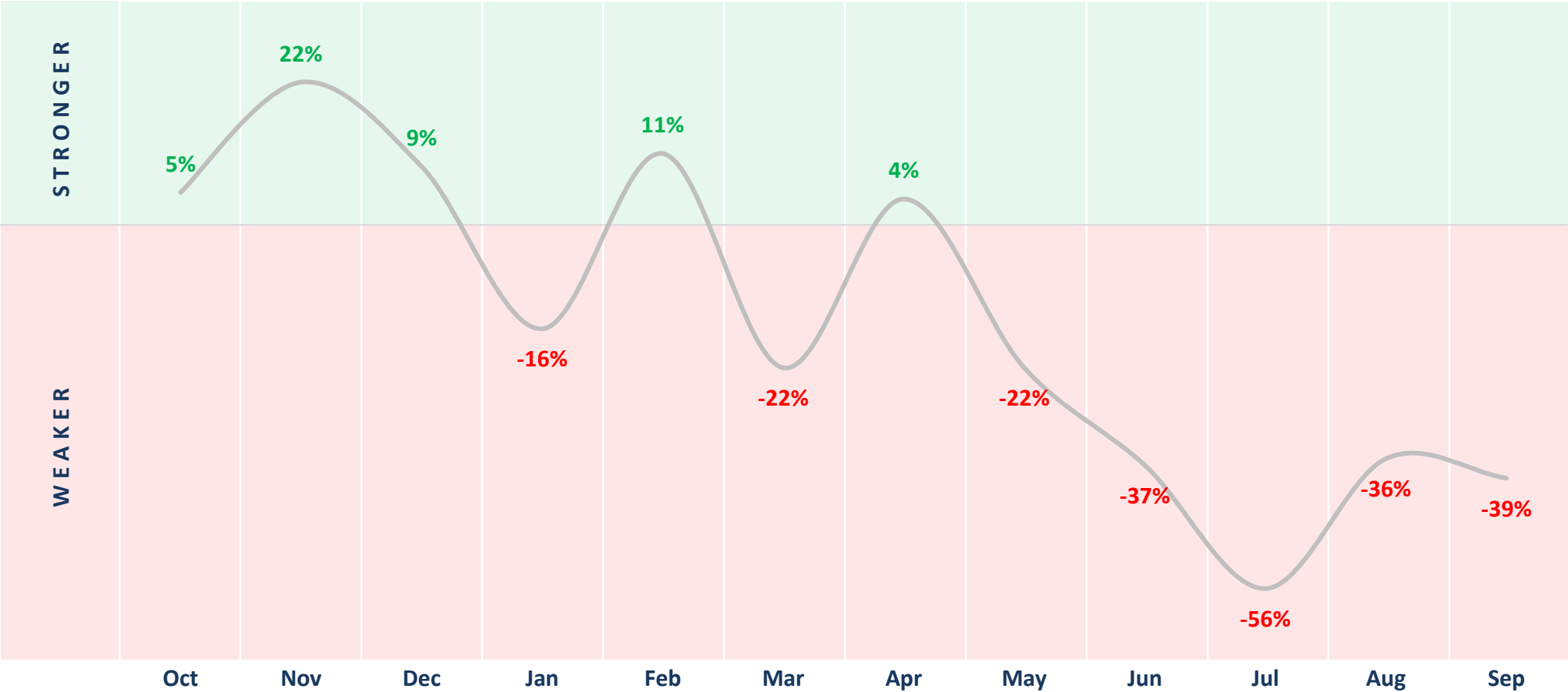
SHARED  
VEHICLES



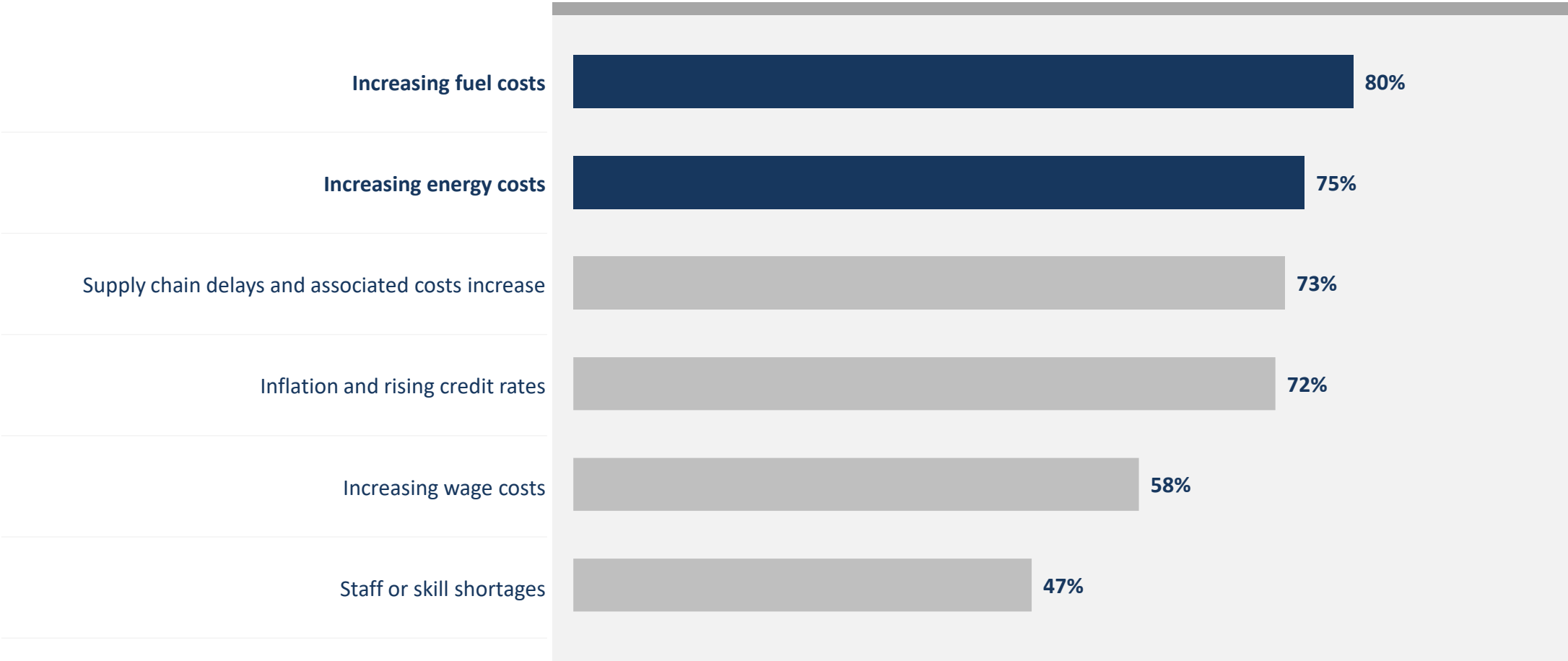
EMERGING  
SOLUTIONS



EXPECTATIONS REGARDING AUSTRALIAN ECONOMIC CONDITIONS (NEXT 3 MONTHS)

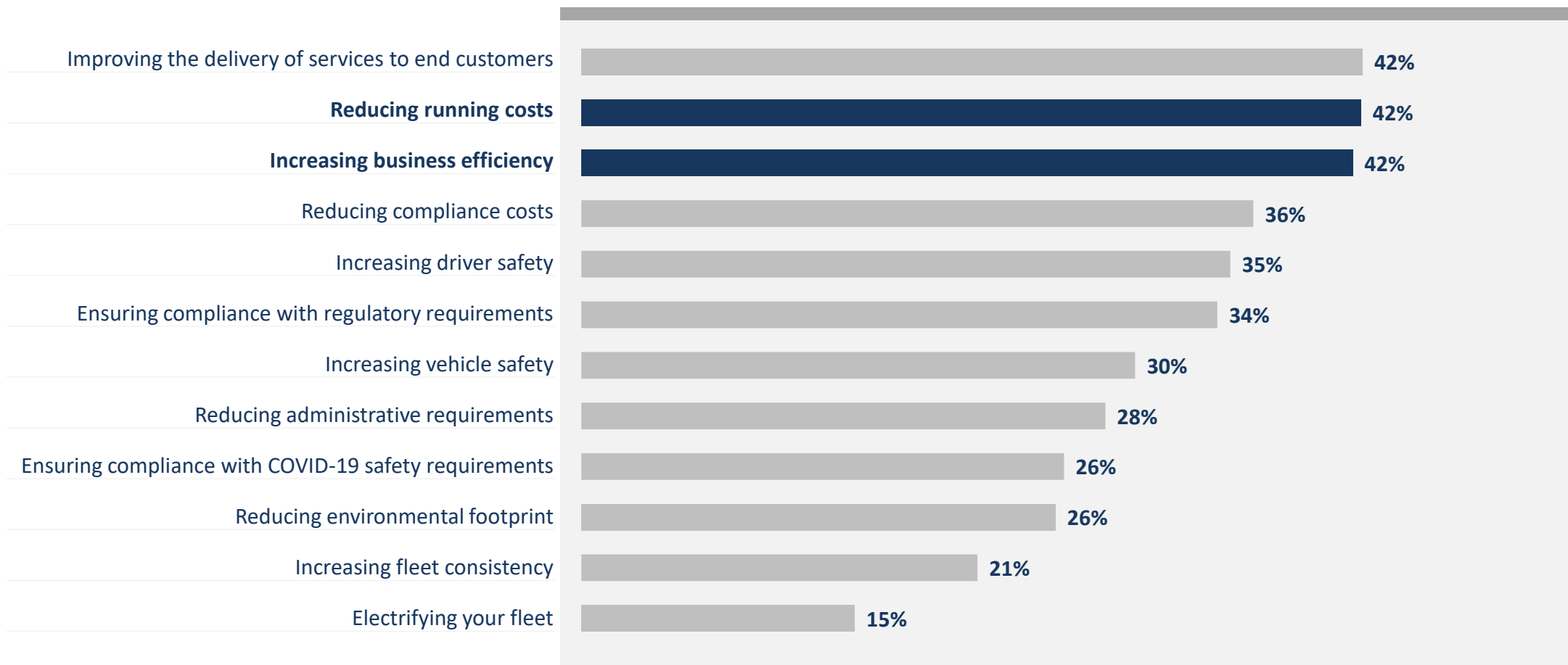


HOW CONCERNED ARE YOU ABOUT THE IMPACT OF THE FOLLOWING ISSUES ON YOUR BUSINESS?



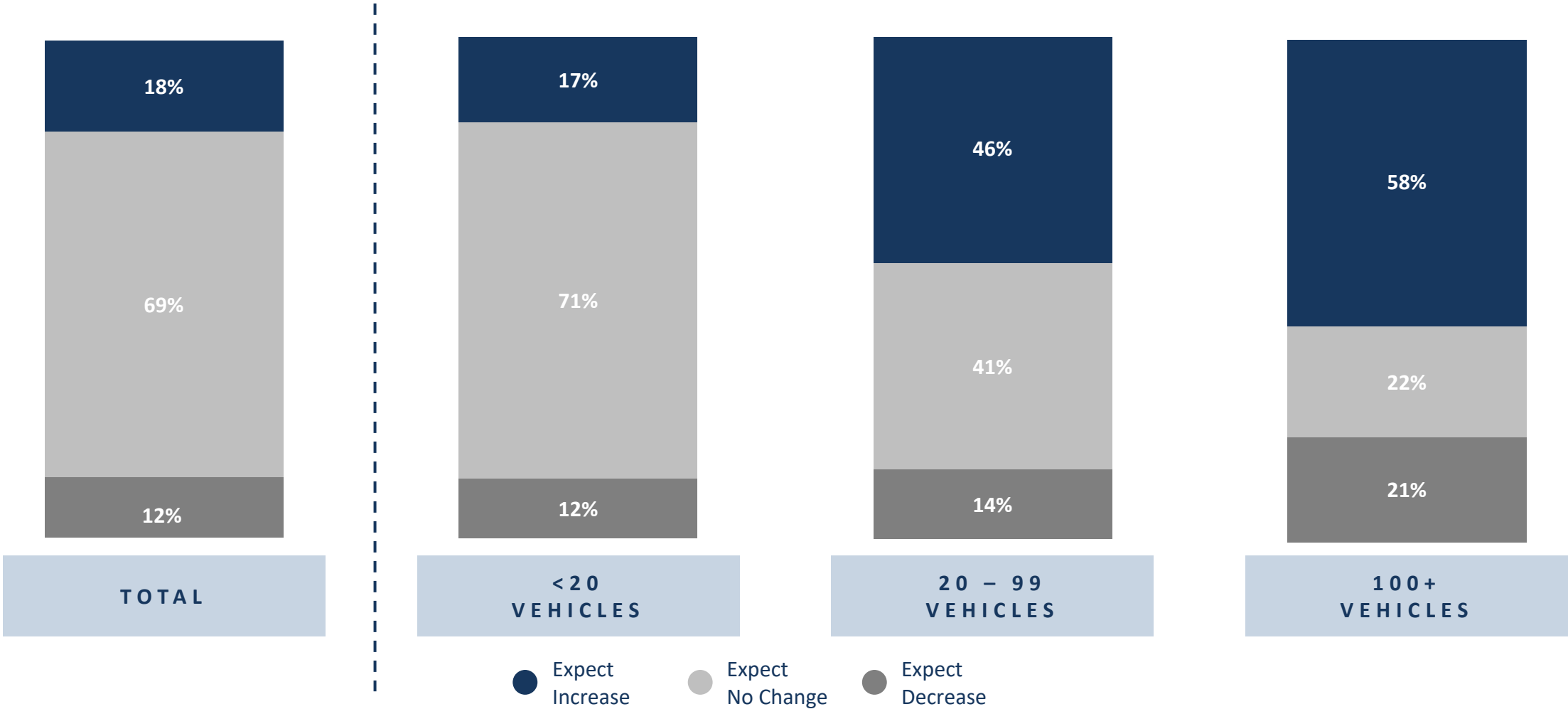
# FLEET MANAGEMENT PRIORITIES

HOW MUCH OF A PRIORITY ARE THE FOLLOWING WHEN IT COMES TO MANAGING YOUR FLEET?  
% HIGH PRIORITY



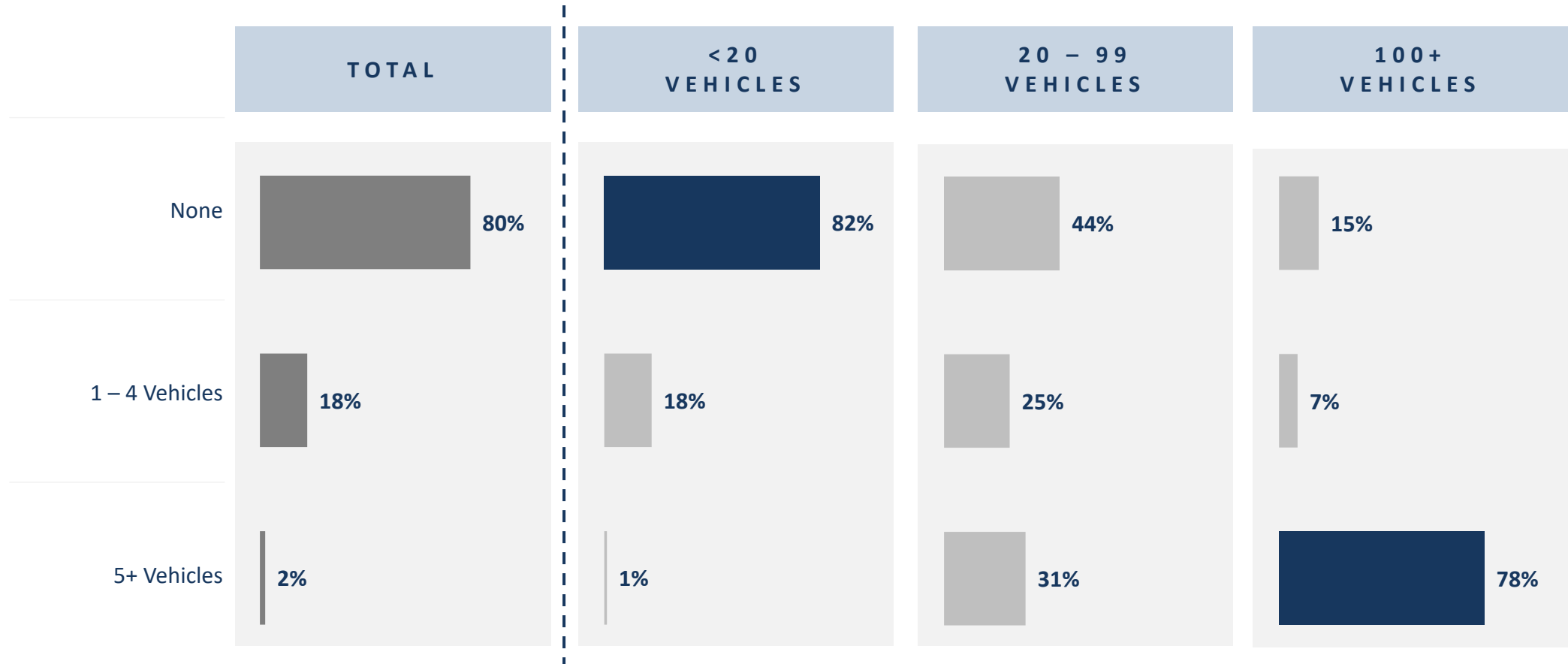
# CHANGING FLEET SIZE

## PLANNED CHANGE IN FLEET SIZE OVER NEXT 12 MONTHS



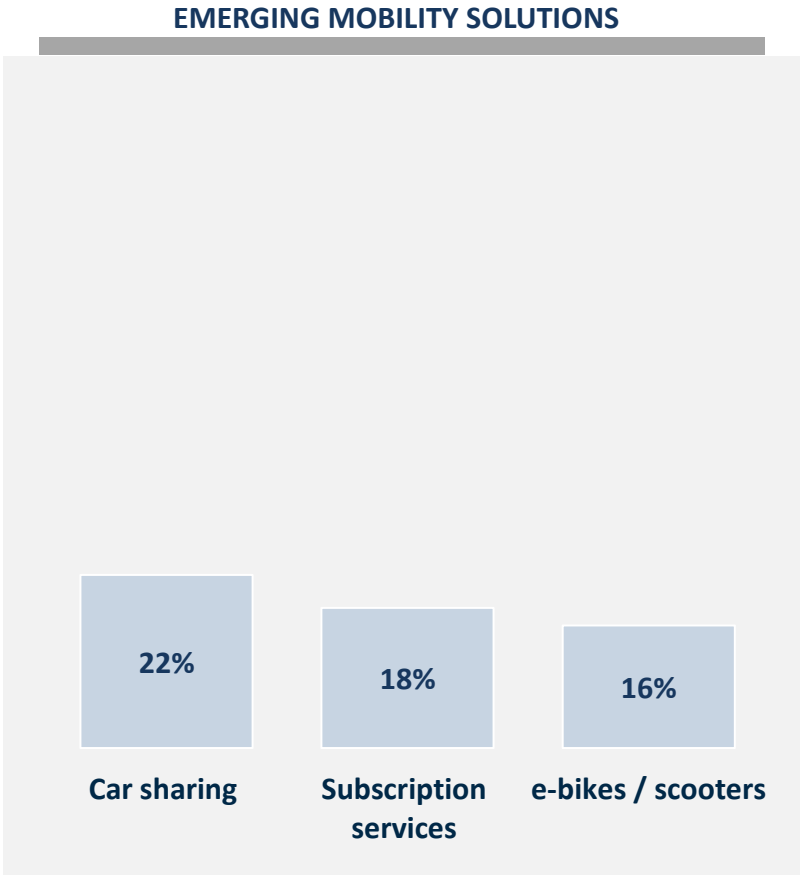
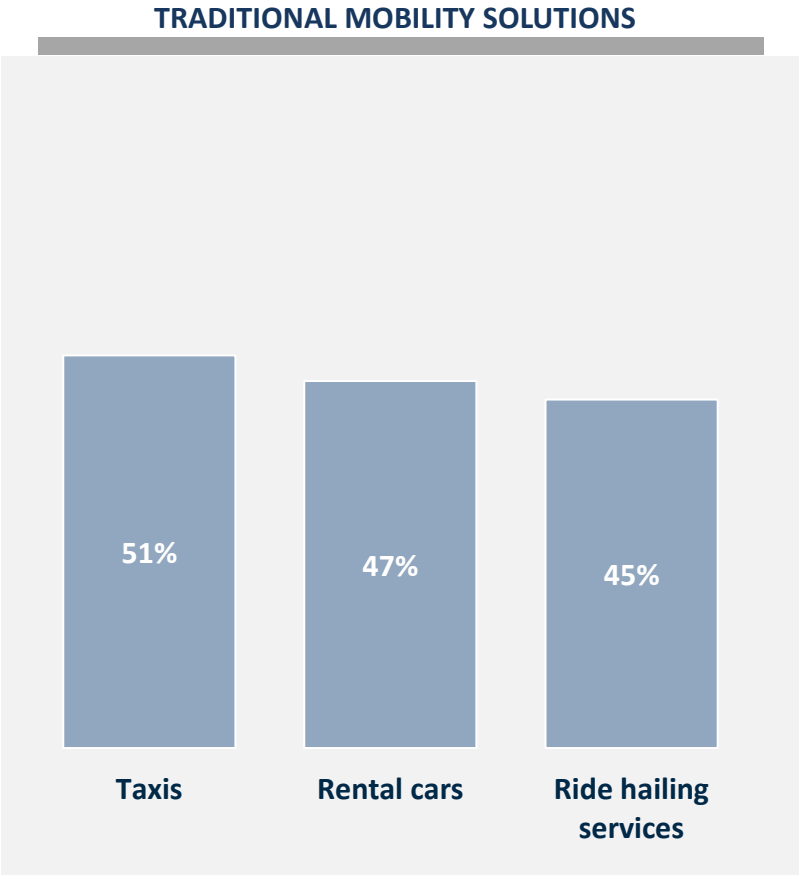
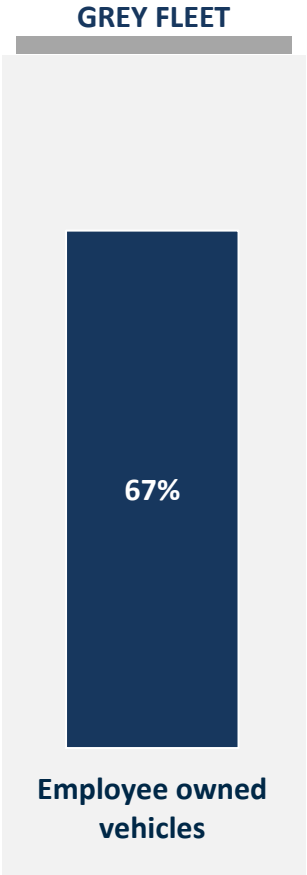
# IMPACT OF GLOBAL NEW VEHICLE SHORTAGES

## NUMBER OF OUTSTANDING VEHICLE ORDERS



# USAGE OF DIFFERENT FORMS OF MOBILITY

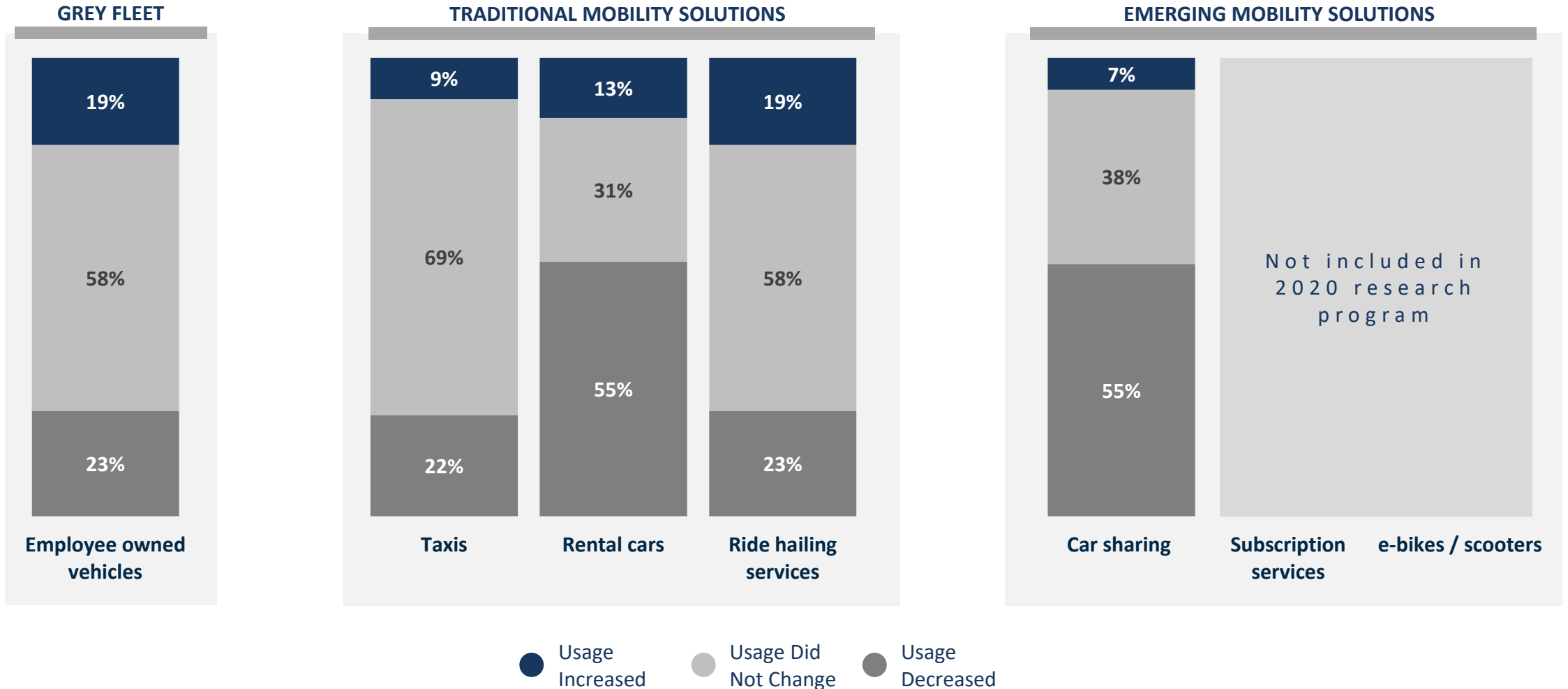
## CURRENT USAGE





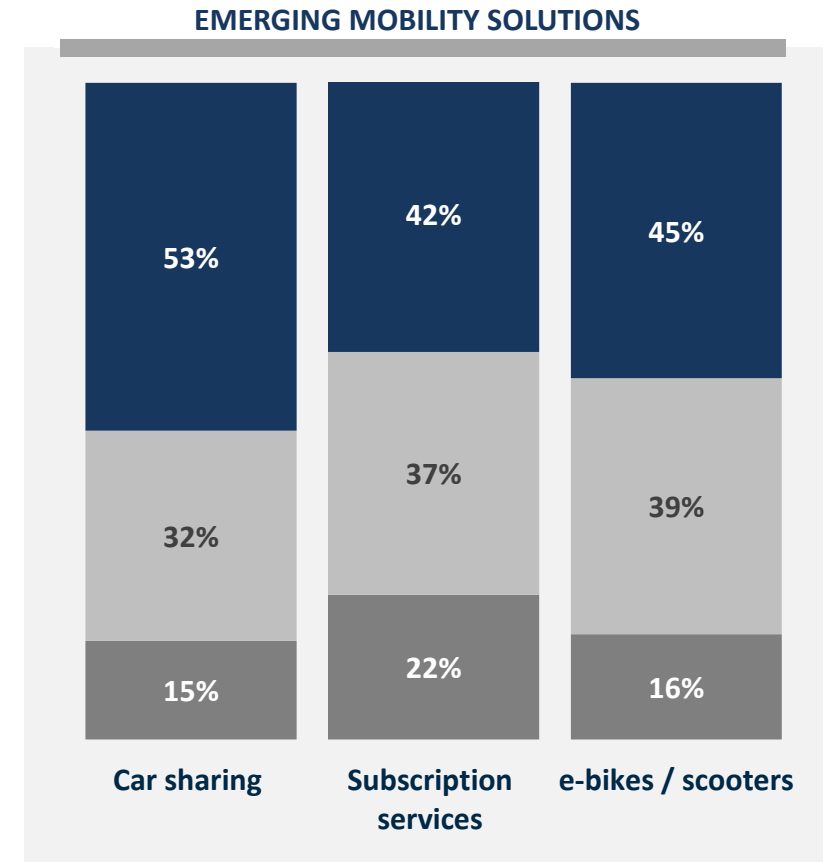
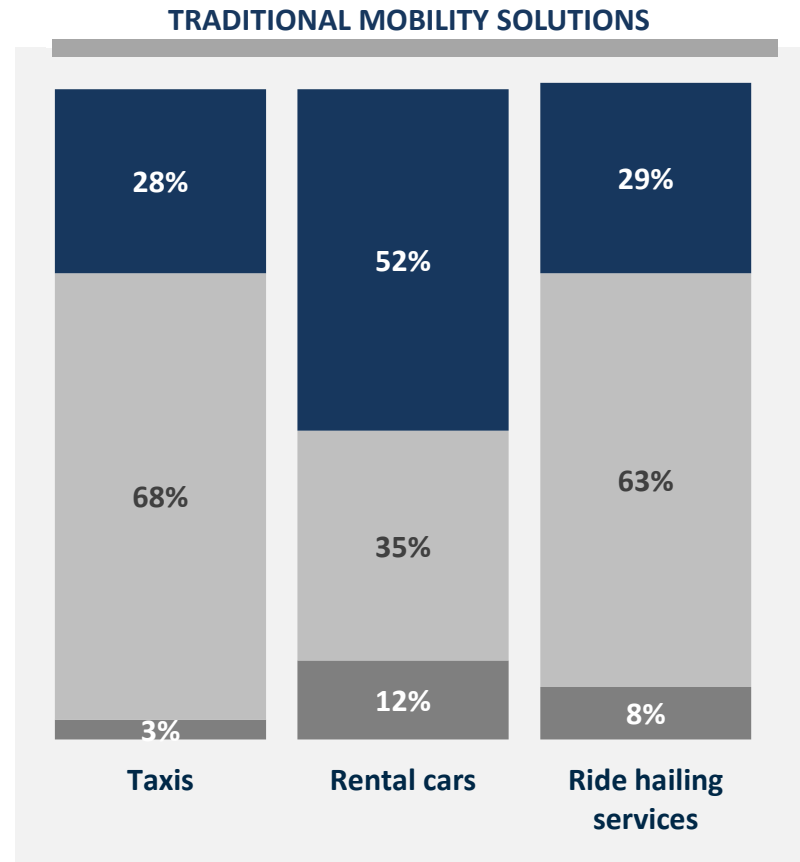
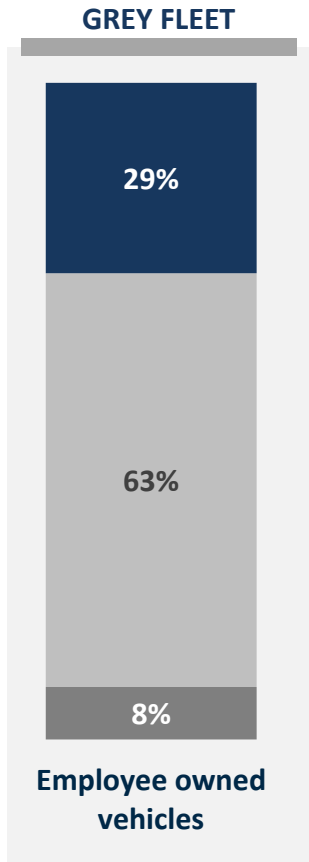
# HISTORIC USAGE TRENDS

## IMPACT OF COVID (CHANGE DURING 2020)



# FUTURE USAGE TRENDS

## PREDICTED CHANGE (2023)



Expect Increase
  Expect No Change
  Expect Decrease

## KEY QUESTIONS



Despite all the changes I've discussed, grey fleet remains a significant issue.

What are we doing to manage usage of personal vehicles to **ensure vehicle and driver safety**?



While we are facing cost pressures, we also need to continue working towards a future where we can serve up the optimal mobility solution for a specific trip.

Given this, how well do we understand our organisation's **current and future mobility needs**?



As we progress along our journey, how can we integrate these solutions into our fleets to **optimise asset usage, and reduce reliance on the traditional lease / own / operate model**?



As fleet managers, who do we think should be responsible for **managing the integration and ongoing usage of emerging mobility solutions** in our organisations?



**THANK YOU!**