

GOODYEAR

**Sustainable Reality
Survey**



2023 REPORT
EUROPE

INTRODUCTION

WHERE SUSTAINABILITY MEETS REALITY

The race towards carbon neutrality in Europe continues. With the advent of more sustainable transport technologies, the industry is working hard to become ever more environmentally conscious. But lofty goals can only carry you so far and fleets often face significant challenges in the effort to become greener. To track exactly how the industry is tackling these challenges, Goodyear launched its Sustainable Reality Survey in 2021. Now, in 2023, we're in our third year and clear trends are starting to emerge.

Thanks to these continuous surveys, we can track how - indeed, if - the industry's opinion and approach have shifted through the years. **Overwhelmingly, we see a positive evolution. It seems that the trends we observed in 2022 are carrying over to 2023, in addition to some exciting new developments for middle-sized and large fleets.**

For instance, in 2022 the number of fleets that see sustainable measures as a means to lower their operation costs rose from 32% to 41%. In 2023, that number has held (more or less) steady at 39%, a testament to the growing understanding of sustainability measures as the economic choice!

Another trend that has held steady is the importance of fleet size.

The larger the fleet, the more important sustainability. Mega fleets (>500 vehicles) continue leading the charge in defining and implementing sustainability goals, with 75% of these fleets having put sustainability measures in place and 23% planning on doing so in the next years.

However, other fleets are joining the mega fleets in sustainability measures. Large fleets especially those operating between

251-500, have grown more ambitious. Last year, 50% of these fleets had defined sustainability goals. This year, we've seen a sharp increase to 66%. Other large fleets have seen similar but less pronounced increases. Sustainability is a **growing concern across the industry and fleets of all sizes are rising to the challenge.**

This is only a fraction of the insights this report contains. In 2023, **1672 fleets across Europe** participated. This increase also means even more trees planted by TreeNation, a non-profit that plants **a tree for every survey response received.**

In total, across the three years of the Sustainable Reality Survey, **4088 trees have been planted.**

This report summarises the survey's key findings, gives access to the detailed numbers behind each question asked, and examines how these have evolved from last year. As we all work together to encourage and promote sustainable operations, we hope these are insights you will find both revealing and encouraging.

Sustainably yours
Goodyear



KEY INSIGHTS
A SUMMARY OF THE FINDINGS

KEY INSIGHTS

A SUMMARY OF THE FINDINGS



1

How important is sustainability?

As always, the first variable the survey establishes is how important transport companies deem sustainability. As with previous years, there is a lot of good news here. Almost 3 out of 4 fleets (68%) rate sustainability as 'important' or 'very important'. 1 in 3 fleets call it a central corporate value, but interestingly, many fleets continue to highlight that they look at sustainability measures as a way to reduce operating costs. It continues to be an undeniable fact that environmental measures need to fit in with the everyday commercial pressures of running a business.



39%

SEE SUSTAINABILITY
AS A MEANS TO REDUCE
OPERATING COSTS



2 **How are fleets monitoring their efforts?**

In order for fleets to maximise the return on their sustainability investment, it's important that they have a goal that you can measure their progress against. That's why the first step in many fleet's sustainability journey is to define clear and measurable goals.

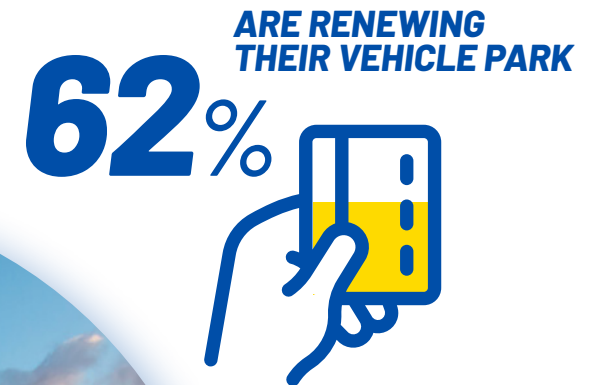
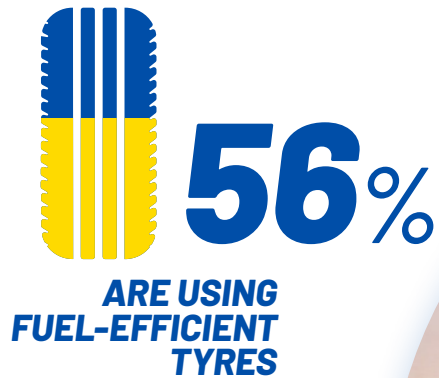
33% of our respondents said that they have defined sustainability goals, and a further 47% said they would do so within a year. Unsurprisingly, larger fleets were more likely to have formalised targets, with 75% reporting they already had them in place. 44% of all fleets said they considered themselves either 'familiar' or 'very familiar' with upcoming environmental legislation; once more, larger fleets reported higher levels of expertise in this area.



3

What actions are fleets taking?

Fleets reported a wide range of measures, including the use of retread tyres, alternative powertrains (e.g. electric), deploying higher-capacity vehicles, telematics solutions and driver training to improve fuel efficiency and therefore reduce emissions. But the main actions taken were the renewal of the vehicle park itself (62%) and the use of fuel-efficient tyres (56%).

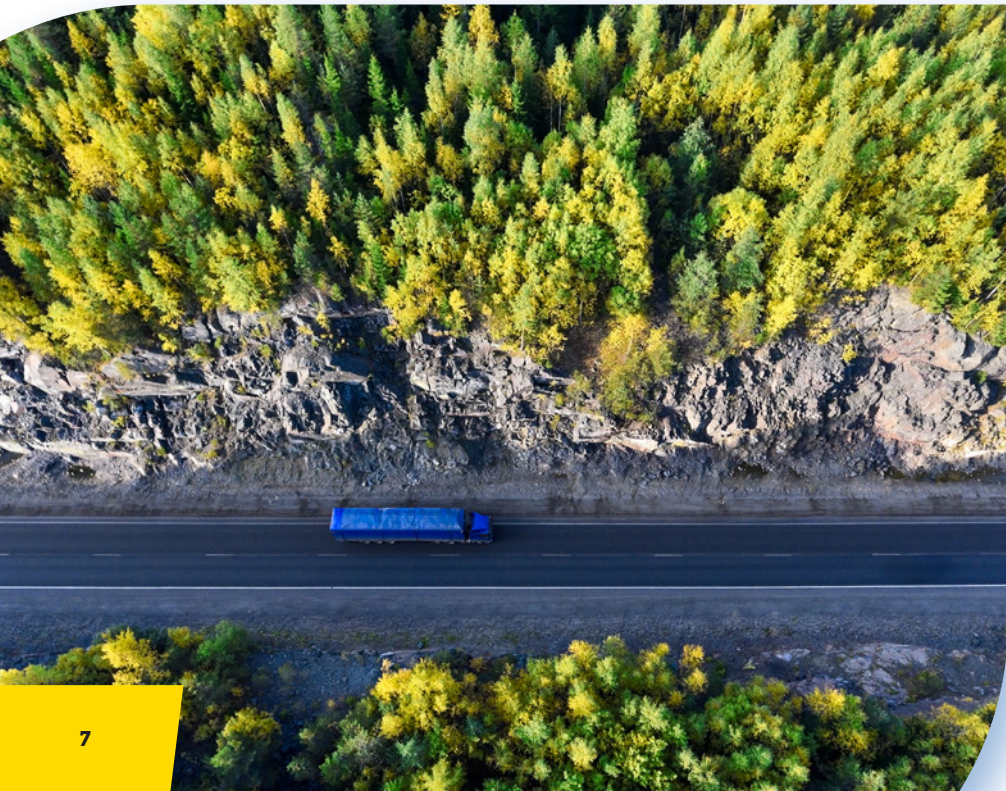


4

Obstacles and incentives...

Fleets also commented on the reasons for and against implementing such measures. Just under 75% of all fleets mentioned that financial incentives such as tax breaks were more powerful drivers for sustainability than other factors, such as customer or investor demand, although these remained significant.

Finally, we saw a sharp increase in the number of respondents who said that the biggest obstacle to adoption was the price of the solutions. 67%, an increase of nearly 10% compared to the previous year, said that solutions were too expensive to be integrated into their everyday activities.



**JUST
UNDER 75%**



**OF ALL FLEETS SEE FINANCIAL
INCENTIVES AS A KEY FACTOR IN
DRIVING INCREASED SUSTAINABILITY.**



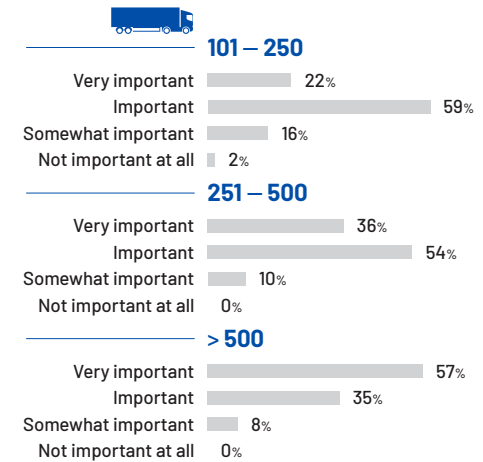
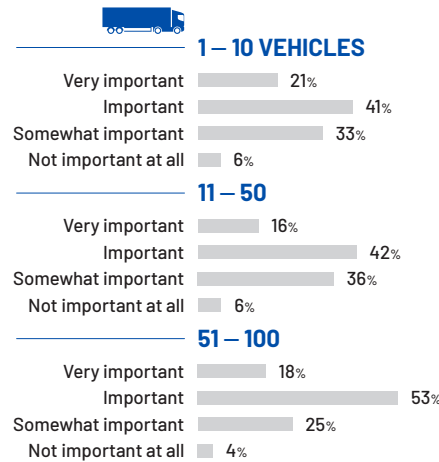
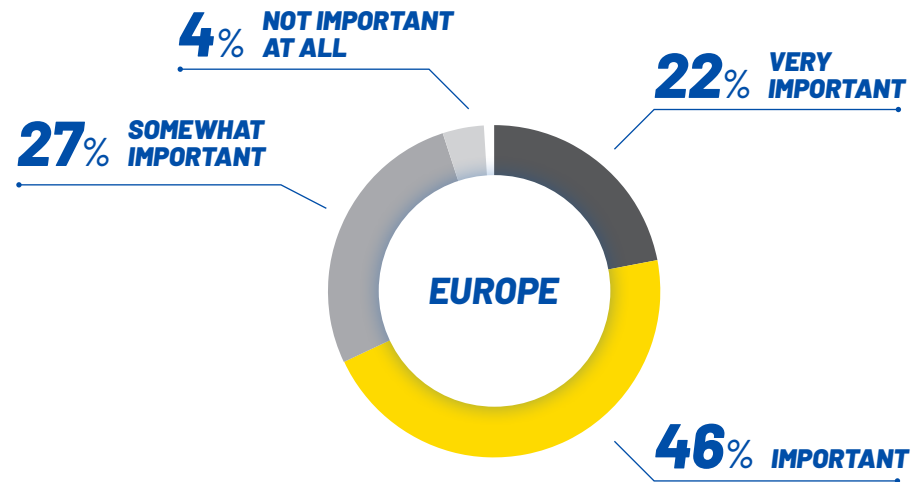


THE SURVEY
FULL RESULTS AT A GLANCE

HOW IMPORTANT IS ENVIRONMENTAL SUSTAINABILITY FOR YOUR COMPANY?

Almost 3 out of 4 fleets recognize sustainability as important or very important.

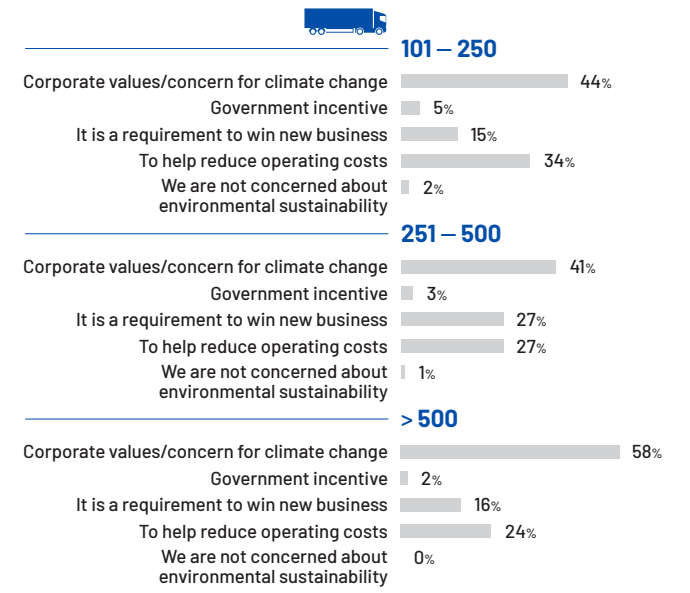
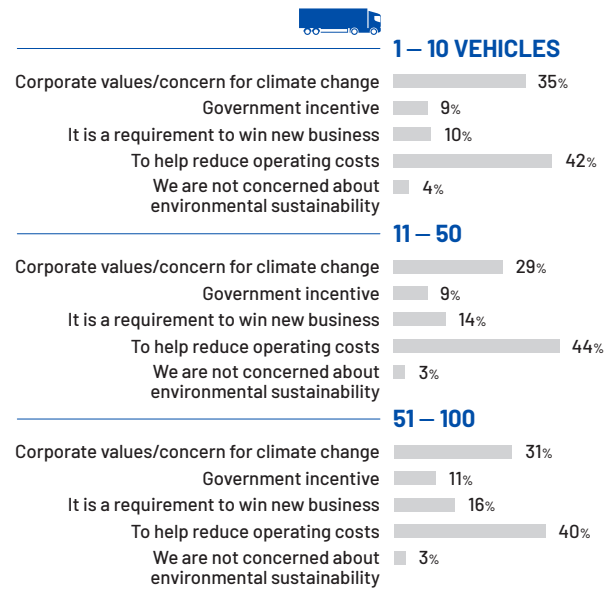
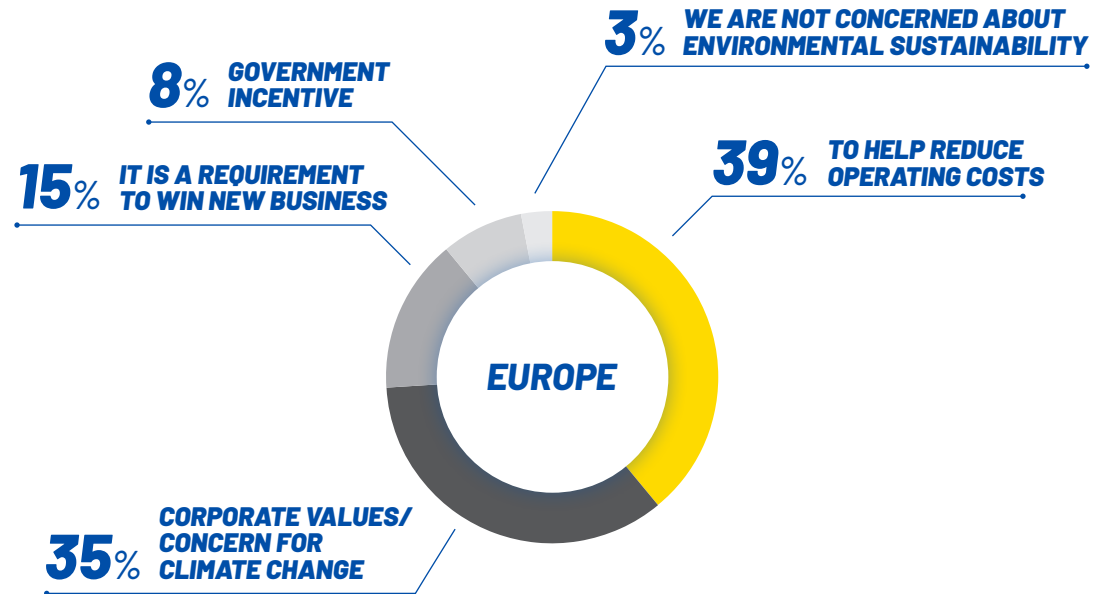
The **bigger** the fleet, the **greater the importance** of sustainability



WHY DOES YOUR COMPANY CARE ABOUT THE ENVIRONMENTAL SUSTAINABILITY OF YOUR OPERATIONS?

39% of fleets see sustainability as a means to reduce operating costs.

Fleets of all sizes value sustainability to the same degree



WHICH SOLUTIONS IS YOUR COMPANY ALREADY USING TO IMPROVE THE ENVIRONMENTAL SUSTAINABILITY OF YOUR FLEET OPERATIONS?

In order to hit the goal, 62% (58% in 2022) total fleets are renewing their park as 56% (54% in 2022) are fitting fuel efficiency tires.

The proportion of action taken is unchanged across fleets of all dimensions, excluding mega fleets.

They saw a sharp drop in eco-driving, and have shifted to telematic solutions and fuel-efficient tyres.

RENEWAL OF THE VEHICLE PARK

62%

FUEL-EFFICIENT TYRES

56%

DRIVER TRAINING/SETTING FUEL CONSUMPTION OBJECTIVES FOR DRIVERS (ECO DRIVING)

44%

TELEMATICS SOLUTIONS TO MONITOR AND REDUCE FUEL CONSUMPTION

47%

42%

RETREAD TYRES

15%

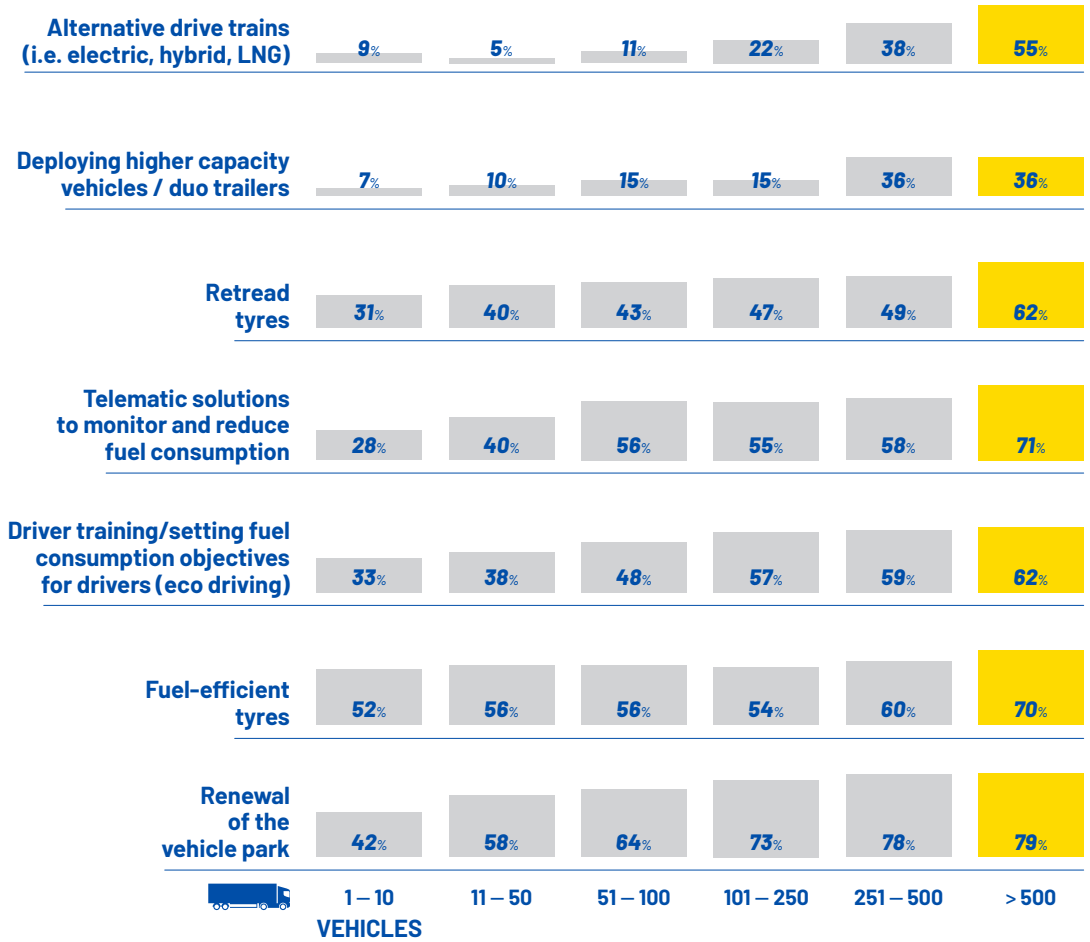
DEPLOYING HIGHER CAPACITY VEHICLES/DUO TRAILERS

14%

ALTERNATIVE POWERTRAINS (I.E. ELECTRIC, HYBRID, LNG)



WHICH SOLUTIONS IS YOUR COMPANY ALREADY USING TO IMPROVE THE ENVIRONMENTAL SUSTAINABILITY OF YOUR FLEET OPERATIONS?

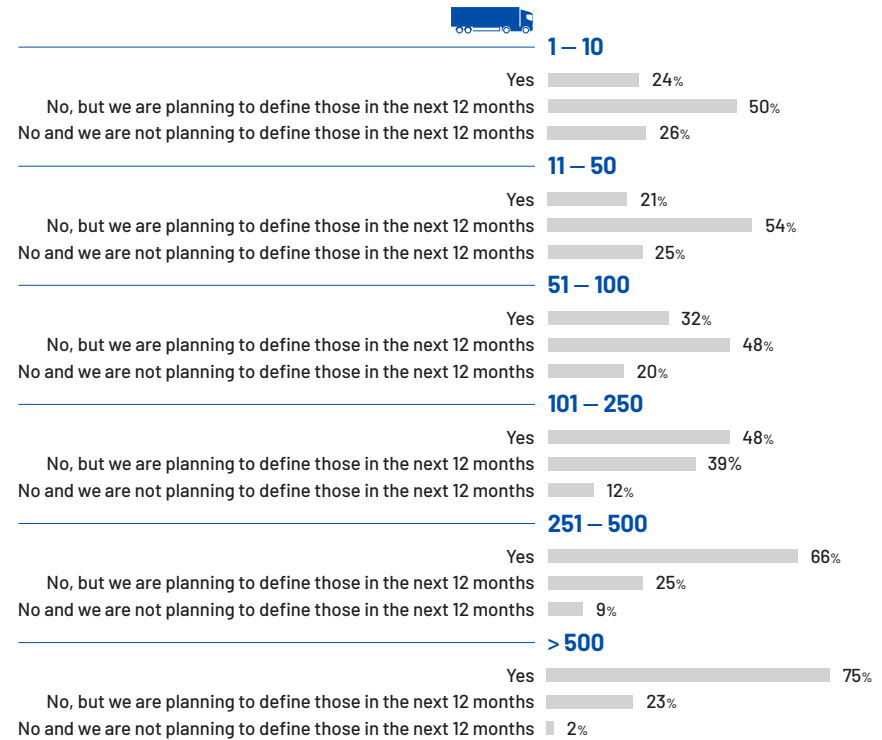
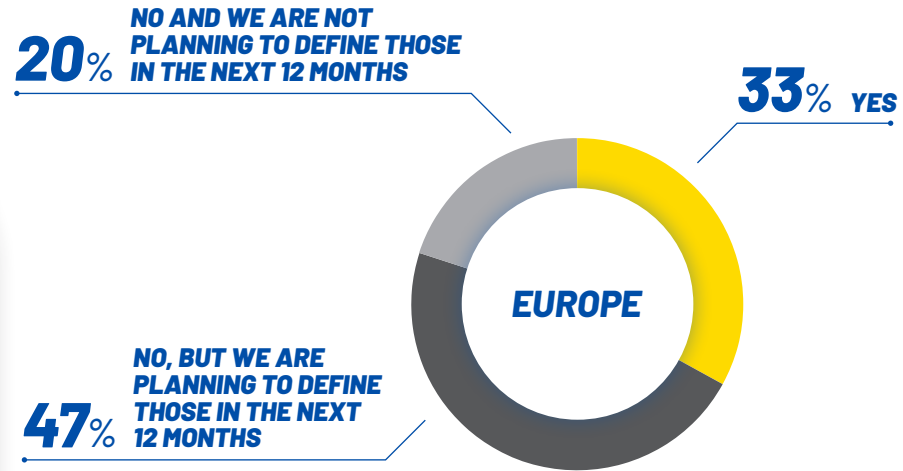


HAS YOUR COMPANY DEFINED AND FORMALISED SUSTAINABILITY OBJECTIVES AND MEASUREMENTS (E.G. CO₂ REDUCTION, WASTE MATERIAL REDUCTION)?

Defining sustainability goals remains a complex challenge, and the large increase indicated by last year's data has not occurred.

IN EUROPE 75%

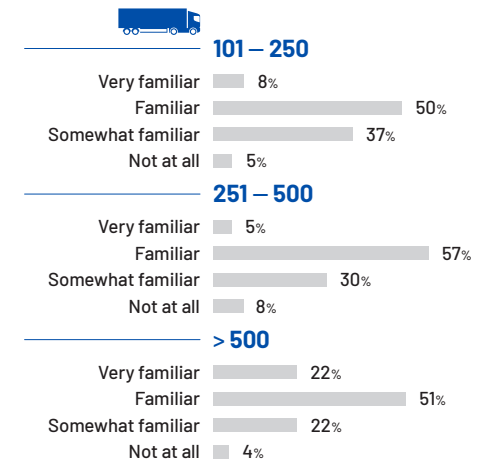
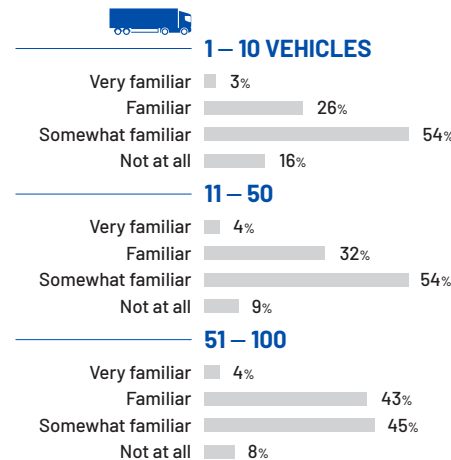
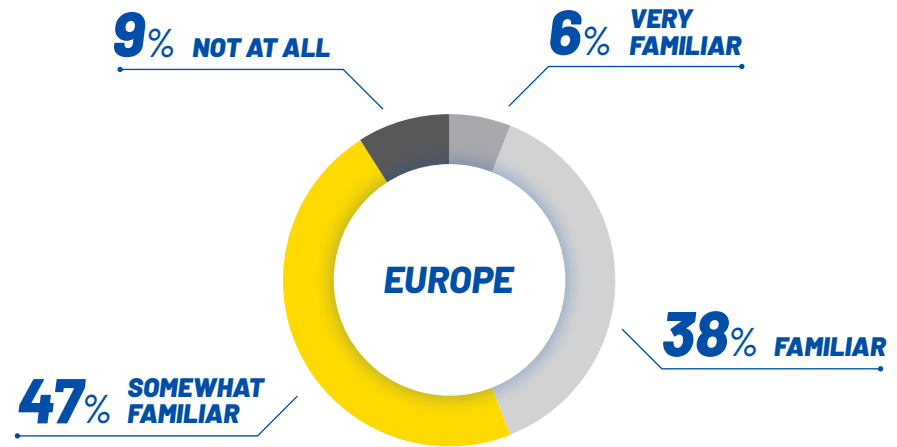
of large fleets have already formalised sustainability targets.



ARE YOU FAMILIAR WITH ALL THE LATEST AND UPCOMING ENVIRONMENTAL LEGISLATION APPLICABLE TO THE TRANSPORTATION INDUSTRY (ENVIRONMENTAL INCENTIVES AND TAXATION SCHEMES, RESTRICTIVE ENVIRONMENTAL REGULATIONS)?

44% of all fleets consider themselves familiar with upcoming environmental legislation.

In the last year, medium fleets have significantly increased their knowledge. They now lead the industry in terms of familiarity with upcoming legislation.



WHAT IS PREVENTING YOUR COMPANY FROM ADOPTING EVEN MORE SUSTAINABLE SOLUTIONS FOR YOUR OPERATIONS?

More cost-effective solutions would increase the rate of adoption amongst fleets of all dimensions.

Cost is increasingly becoming the biggest obstacle, with 67% of fleets citing it as a big concern in 2023, compared to 59% in 2022.

SOME SOLUTIONS ARE TOO EXPENSIVE

67%

SOME SOLUTIONS ARE TOO COMPLICATED TO BE INTEGRATED IN OUR EVERYDAY ACTIVITY

46%

WE DON'T HAVE ENOUGH PERSONNEL TO MANAGE OTHER SOLUTIONS

28%

26%

DOUBTS ON THE EFFICACY OF SOME SOLUTIONS

26%

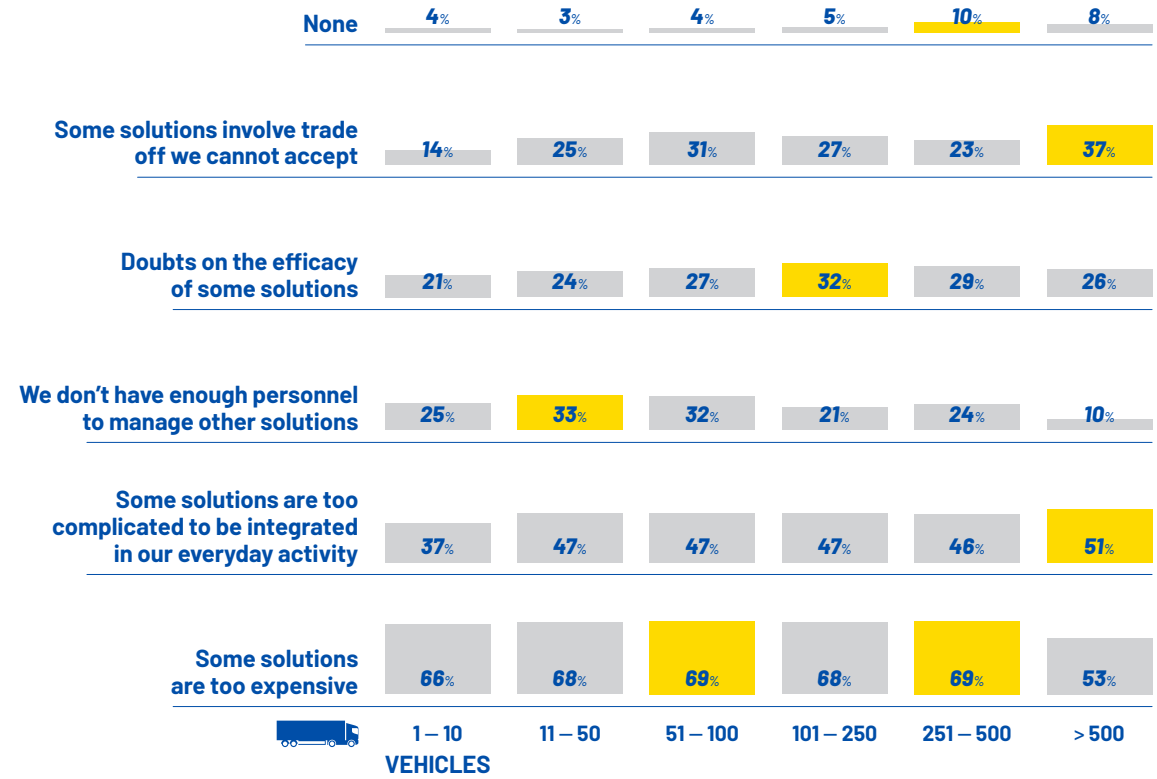
SOME SOLUTIONS INVOLVE TRADE OFF WE CANNOT ACCEPT

4%

NONE



WHAT IS PREVENTING YOUR COMPANY FROM ADOPTING EVEN MORE SUSTAINABLE SOLUTIONS FOR YOUR OPERATIONS?



**WHICH OF THE FOLLOWING FACTORS
COULD ENCOURAGE YOU TO IMPROVE THE
SUSTAINABILITY OF YOUR OPERATIONS?**

**Financial incentives remains
the key factor in driving
increased sustainability.**

**73% OF ALL
FLEETS**

(vs 74% in 2021) see financial
incentives as the key factor.

**FINANCIAL
INCENTIVES**

73%

**AVAILABILITY OF
SOLUTIONS THAT CAN
IMPROVE SUSTAINABILITY
AND PROFITABILITY AT THE
SAME TIME**

46%

**SOLUTIONS
THAT ARE
EASIER TO USE**

47%

35%

**INCREASED DEMAND
FROM CUSTOMERS**

20%

**IMPROVED
KNOWLEDGE OF
ENVIRONMENTAL
REGULATIONS**

14%

**INCREASED FOCUS/
DEMAND BY INVESTORS**



**WHICH OF THE FOLLOWING FACTORS
COULD ENCOURAGE YOU TO IMPROVE THE
SUSTAINABILITY OF YOUR OPERATIONS?**

