

GOODYEAR

**Sustainable Reality
Survey**



2023 REPORT
UK + IRELAND

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 even 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 has 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.**

The larger the fleet, the more important sustainability becomes. 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.

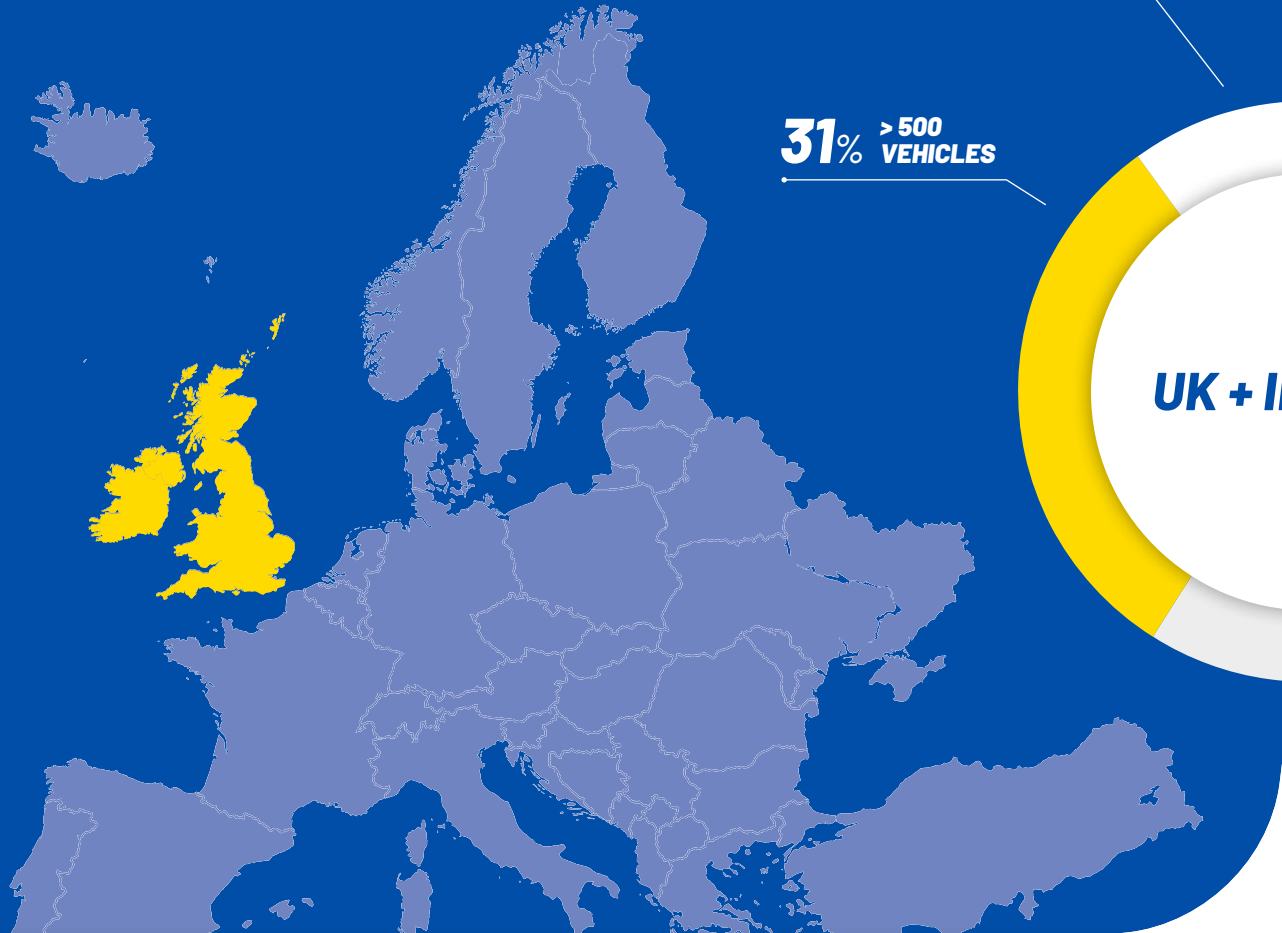
Sustainably yours
Goodyear



THE SURVEY
FULL RESULTS AT A GLANCE

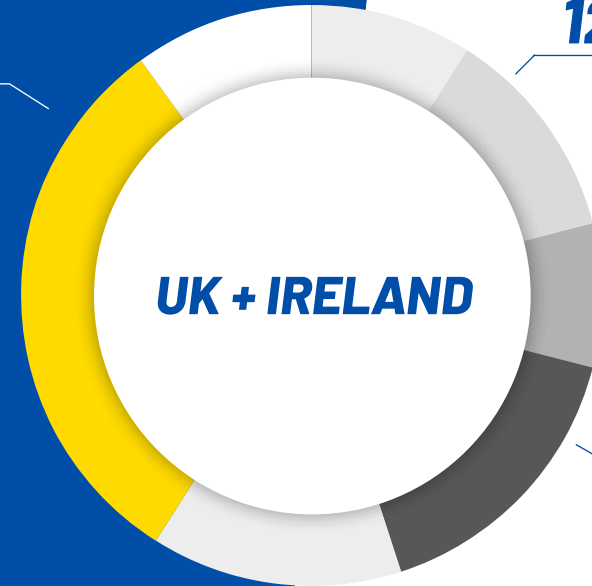
THE FOLLOWING PAGES OF THE REPORT ARE BASED ON THE SURVEY RESPONSES PROVIDED BY TRUCK FLEETS IN THE **UK + IRELAND**, WITH INSIGHTS SPECIFIC TO THESE COUNTRIES.

IN TOTAL, **74** RESPONSES WERE RECEIVED; FLEET SIZES ARE SHOWN IN THE DIAGRAM OPPOSITE.



10% I DON'T WORK IN THE TRANSPORT INDUSTRY

31% > 500 VEHICLES



9% 1-10 VEHICLES

12% 11-50 VEHICLES

8% 51-100 VEHICLES

16% 101-250 VEHICLES

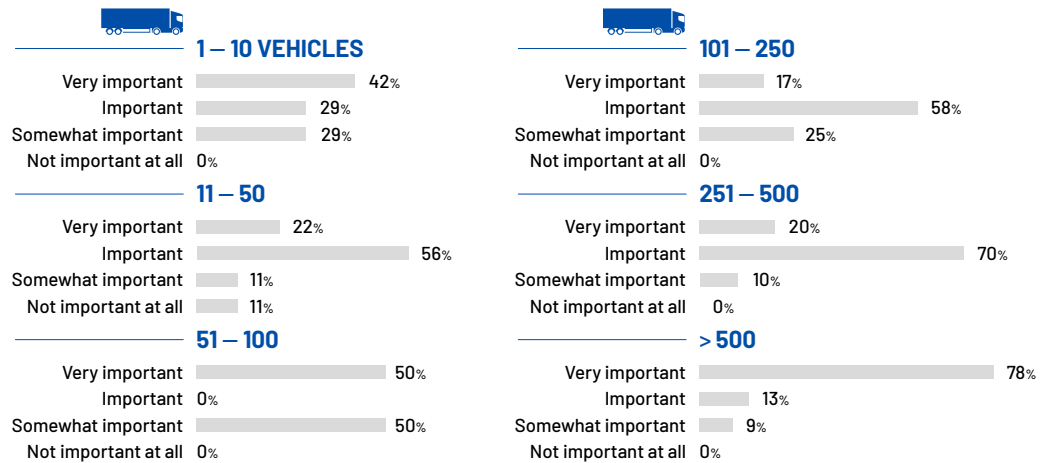
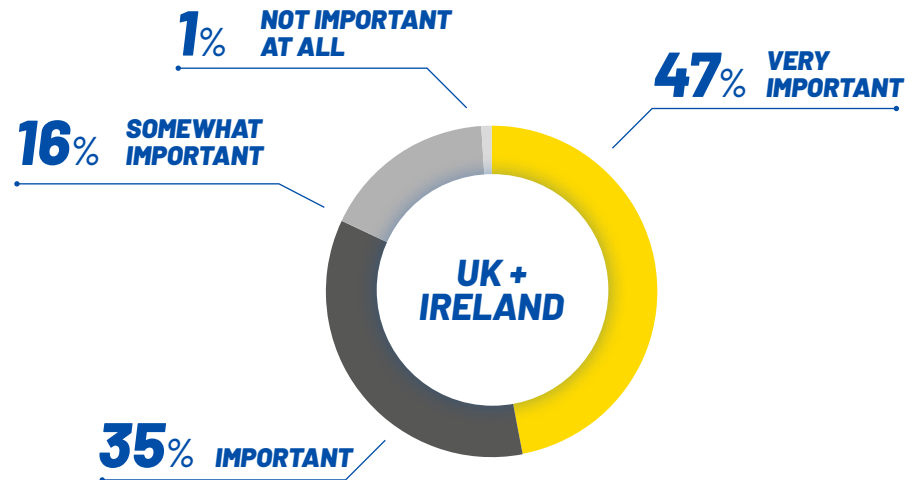
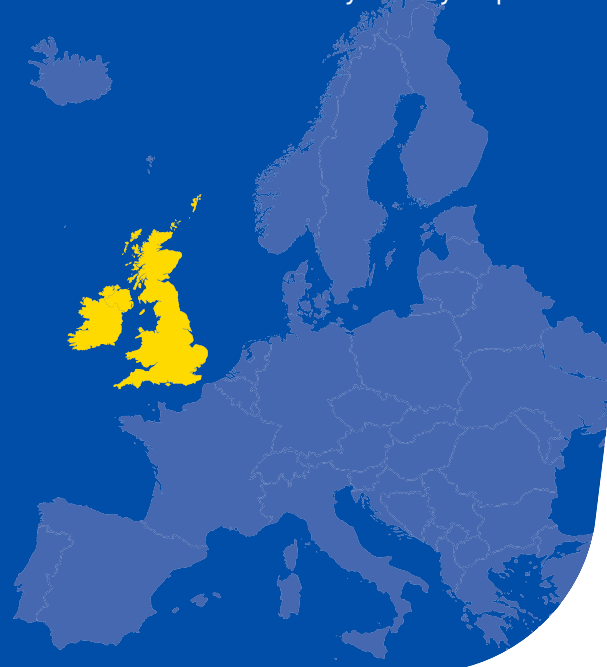
14% 251-500 VEHICLES



HOW IMPORTANT IS ENVIRONMENTAL SUSTAINABILITY FOR YOUR COMPANY?

67% (98% in 2022, 97% in 2021) recognise sustainability as important.

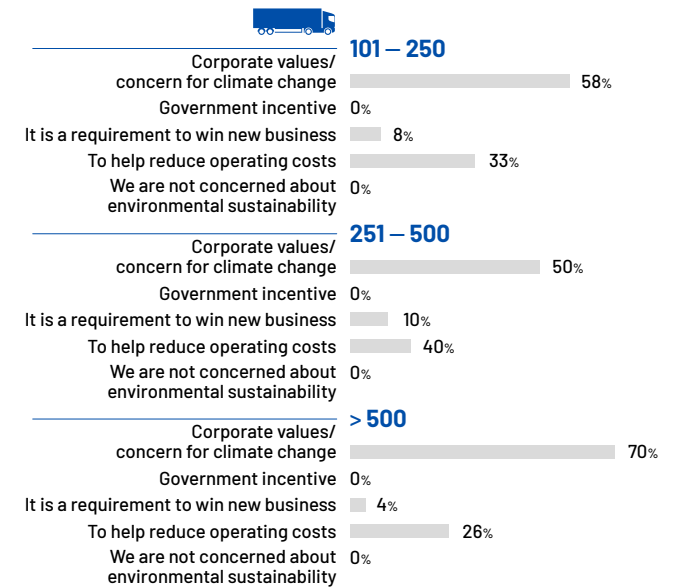
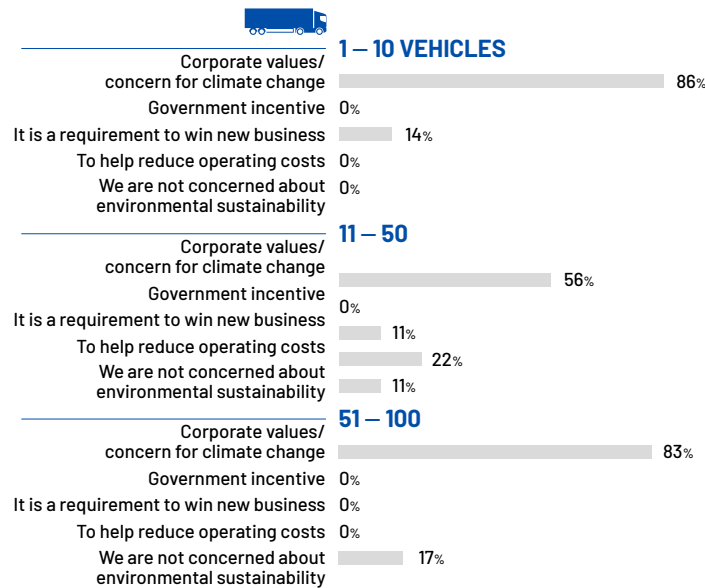
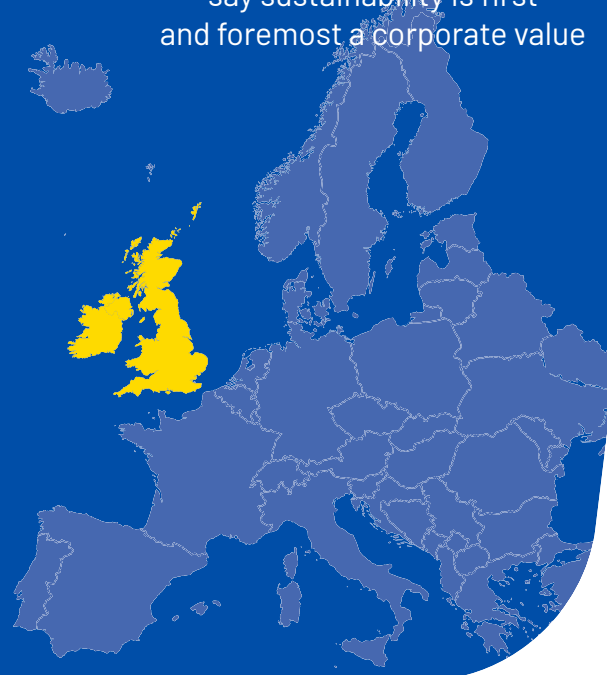
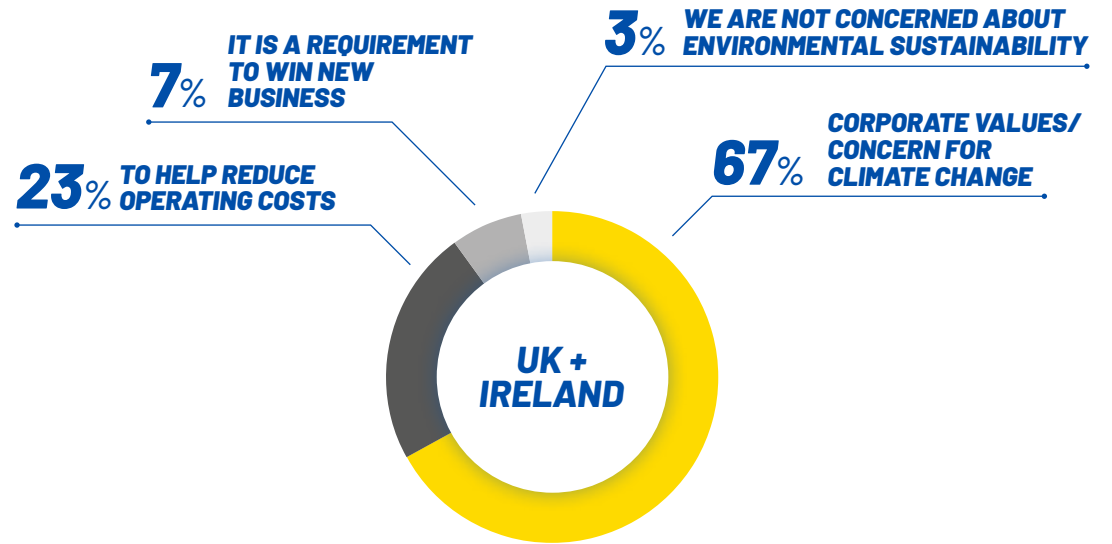
78% mega fleets think that sustainability is very important



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

67% (66% in 2022, 63% in 2021) total fleets consider sustainability a value driver for their corporate image.

Fleets of all dimensions say sustainability is first and foremost a corporate value



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

In order to hit the goal, 67% (64% in 2022, 67% in 2021) total fleets are fitting fuel efficient tyres.

The proportion of action taken is unchanged across fleets of all sizes.

Fuel-efficient tyres, followed by **Eco-driving** and **telematics solutions** still are the main drivers to improve sustainability.

RENEWAL OF THE VEHICLE PARK

43%

FUEL-EFFICIENT TYRES

67%

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

64%

TELEMATICS SOLUTIONS TO MONITOR AND REDUCE FUEL CONSUMPTION

63%

49%

RETREAD TYRES

34%

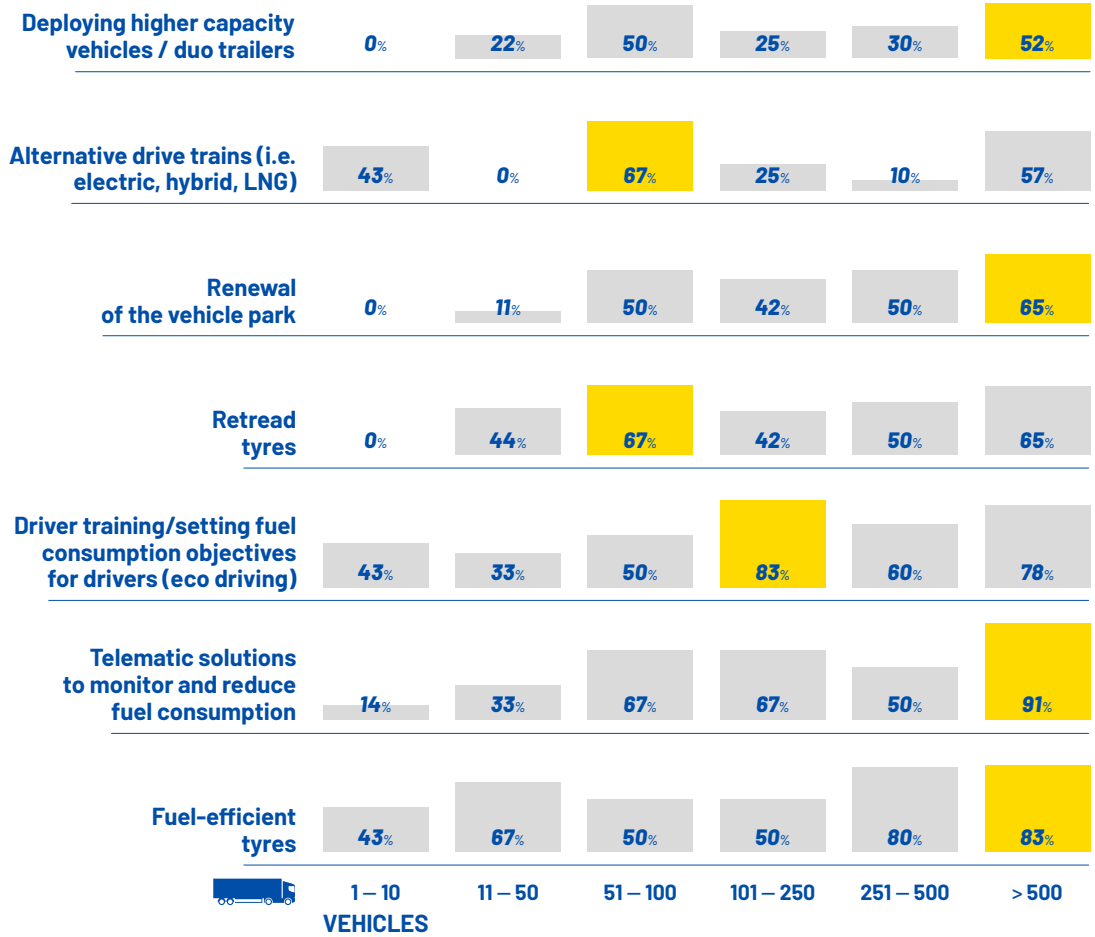
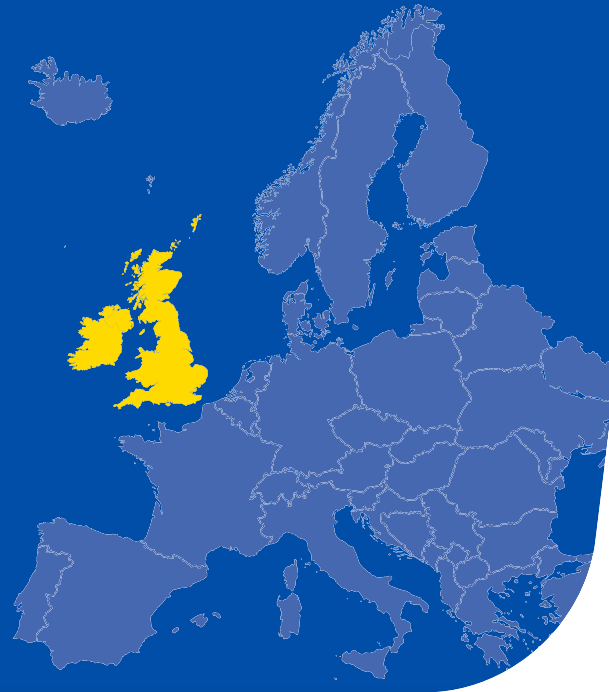
DEPLOYING HIGHER CAPACITY VEHICLES/DUO TRAILERS

36%

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)?

Sustainability objectives will be defined and formalised for 59%, 93% in 2022, 88% in 2021) total fleets within next 12 months.

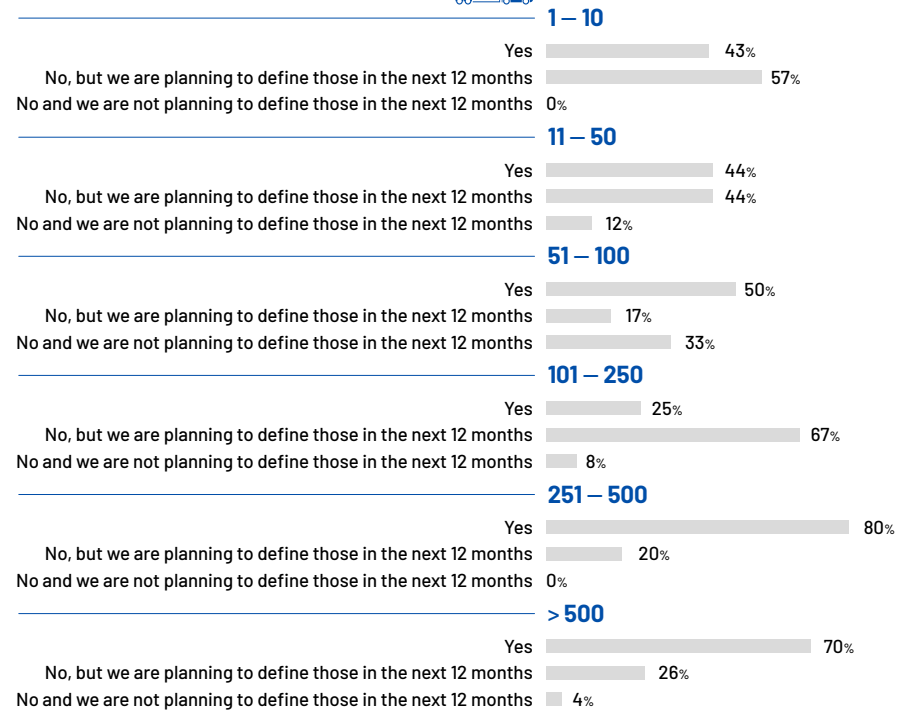
IN THE UK & IRELAND 70%

of large fleets have already formalised sustainability targets.

7% NO AND WE ARE NOT PLANNING TO DEFINE THOSE IN THE NEXT 12 MONTHS

59% YES

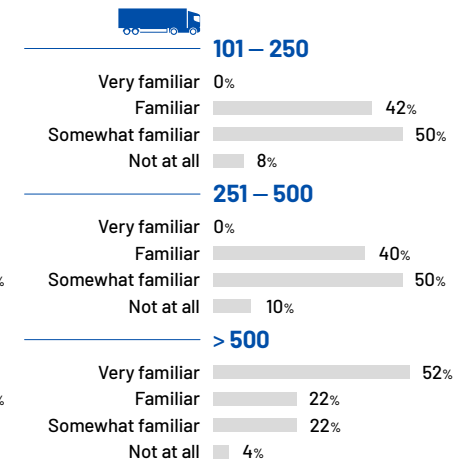
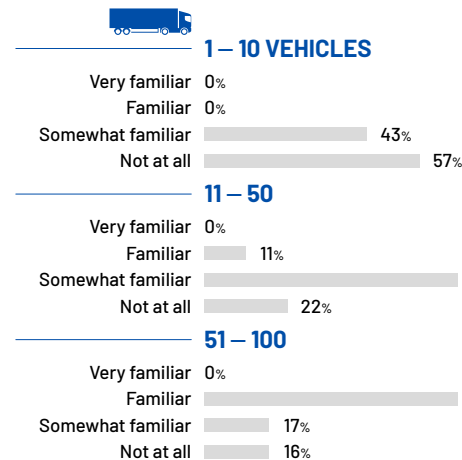
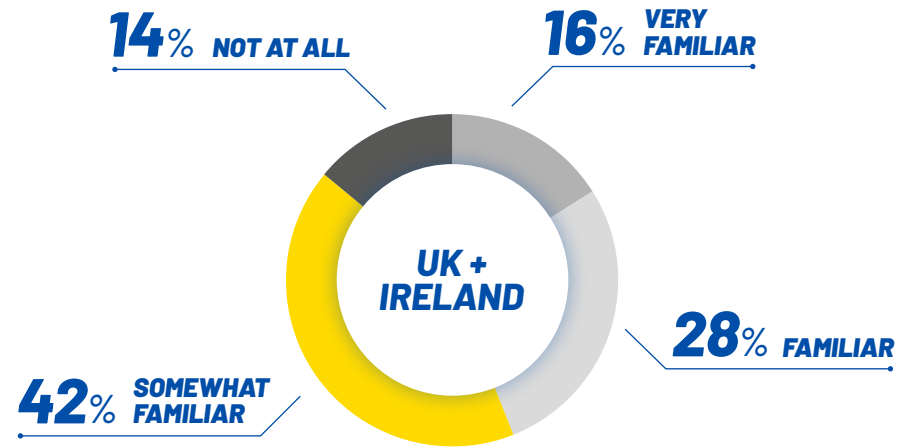
34% NO, BUT WE ARE PLANNING TO DEFINE THOSE IN THE NEXT 12 MONTHS



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

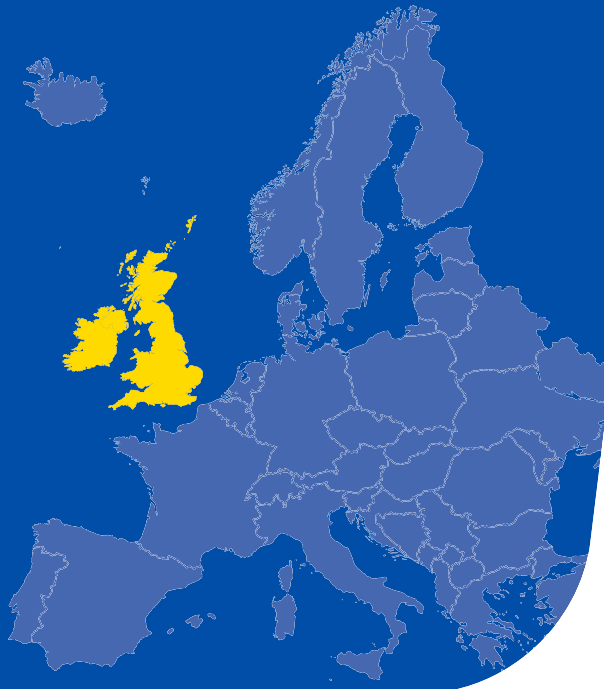
Overall 86% of all fleets consider themselves familiar with upcoming environmental legislation.

There is a clear divide between the familiarity large fleets have with upcoming environmental legislation compared to that of smaller fleets. Despite this, overall familiarity of fleets in the industry has grown since last year.



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

More cost effective (54%) and straightforward (37%, 44% in 2022, 36% in 2021) solutions would increase rate of adoption amongst fleets of all sizes.



SOME SOLUTIONS ARE TOO EXPENSIVE

54%

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

37%

WE DON'T HAVE ENOUGH PERSONNEL TO MANAGE OTHER SOLUTIONS

19%

31%

DOUBTS ON THE EFFICACY OF SOME SOLUTIONS

19%

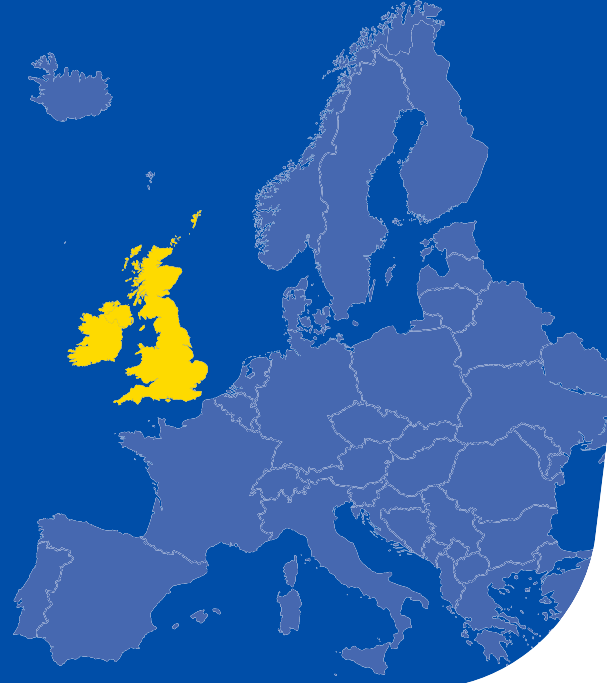
SOME SOLUTIONS INVOLVE TRADE OFF WE CANNOT ACCEPT

10%

NONE

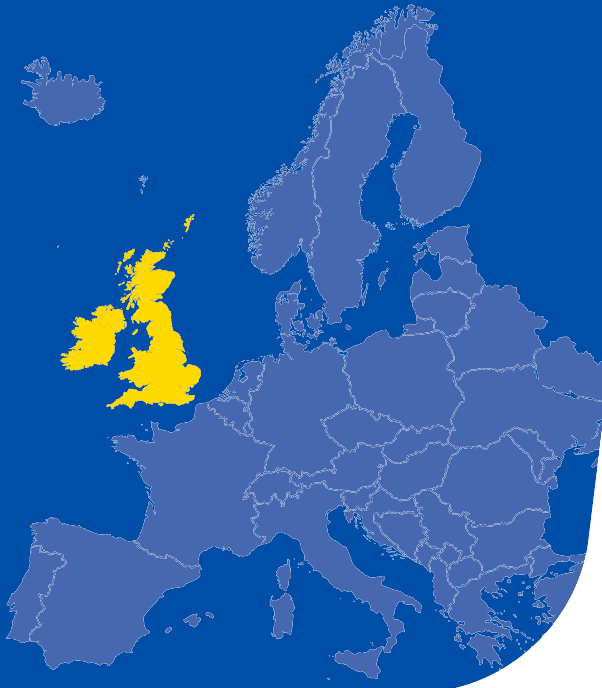


WHAT IS PREVENTING YOUR COMPANY FROM ADOPTING EVEN MORE SUSTAINABLE SOLUTIONS FOR YOUR OPERATIONS?



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

**72% (72% in 2022, 75% in
2021) total fleets consider
financial aids as key in order
to improve the sustainability
of their operations.**



**FINANCIAL
INCENTIVES**

72%

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

51%

**SOLUTIONS
THAT ARE
EASIER TO USE**

64%

58%

**INCREASED DEMAND
FROM CUSTOMERS**

34%

**IMPROVED
KNOWLEDGE OF
ENVIRONMENTAL
REGULATIONS**

31%

**INCREASED FOCUS/
DEMAND BY INVESTORS**



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

