



Re-thinking business **mobility**

Sustainable mobility in
the UK fleet sector

Research report

Better with every move.

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SOCIETE GENERALE GROUP

Re-thinking business mobility



Sustainability has become a topic no fleet decision-maker can afford to ignore. Transportation is the UK's largest source of CO₂ emissions [1] and, with a target of 2050 to become a net-zero carbon economy, there's an urgent need to re-think how people and goods move. Businesses will be at the forefront of that change.

At Ayvens, we believe sustainability is about more than just curbing emissions – it's an opportunity for businesses to improve their operational efficiency, cut costs and enhance their image with employees and customers. That's why we're providing a portfolio including electrified vehicles, digital products and mobility-as-a-service (MaaS) solutions to support decision-makers as they work towards those goals.

To mark the first Fleet News Sustainable Mobility week, we've surveyed 252 decision-makers at the UK's largest fleets (operating more than 250 vehicles) to find out how they are engaging with their sustainability journey, and what it's meant for their organisation.

The results underscore how important this topic has become. Most (84%) respondents said they believe the UK's 2050 net-zero goal is realistic, while 97% said their business is facing increased external pressure to improve their environmental performance. However, the majority (91%) added that efforts to curb their environmental impact had benefitted their organisation – both as an employer and a business.

We've addressed the key questions raised in this report looking at responses in detail, and identifying some of the potential challenges and opportunities for fleets as they work towards a more sustainable operation.

Tim Laver
UK Managing Director, Ayvens



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[1] <https://assets.publishing.service.gov.uk/media/6604460f91a320001a82b0fd/uk-greenhouse-gas-emissions-provisional-figures-statistical-release-2023.pdf>





1

A note on methodology

An online survey was conducted by Atomik Research among 252 respondents from across the UK, all of whom were fleet decision makers within their company and with 250 vehicles or more. The research fieldwork took place on 1st October – 7th October 2024.

Atomik Research is an independent creative market research agency that employs MRS-certified researchers and abides to MRS code.



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How is **policy** impacting fleet decision-making?

Businesses are a critical part of the UK's net-zero goals. Publicly listed businesses, large companies or limited liability partnerships are legally required to disclose energy use and greenhouse gas emissions within their directors' report, while others can opt to do so voluntarily.^[2]

Naturally, transport was a focus within our survey results. Most (93%) survey respondents said they have fleet-specific sustainability targets, and 88% of that group are reporting their progress to external stakeholders and the public.

Most (92%) respondents said they were on track to meet their environmental targets, and the results show a heightened awareness of ensuring that the process is robust:

- **96%** had sought stakeholder feedback, while 89% had done so more than once
- **88%** said their company could do more to promote its progress.
- **37%** had been accused of 'greenwashing', with heightened attention from activists and regulators (33%), internal stakeholders (31%) and customers (28%) were frequently raised as challenges for those who report publicly.

Those plans are also influenced by customer relationships. Although reporting Scope 3 emissions is optional, a third of responses (32%) said their fleet decarbonisation strategy was heavily influenced by customer demands for a more sustainable supply chain.

35% More than a third of fleets are concerned about accusations of 'greenwashing' when reporting their environmental progress.

"The aim is to be net zero by 2030 for the whole of Stannah. We were already on the electrification journey for our car fleets before the net zero goal announcements were made in 2020, and we've held firm on those targets regardless of what the UK government is doing.

"There are other changes we would have hoped for. For instance, smaller targets for infrastructure improvements, assisting councils in improving streetside charging, and providing help and guidance then it would have been a really strong plan. In reality, it seems like putting the cart before the horse. There also needs to be differentiation between different types of vehicles – 100% EV for cars is very much doable, but for vans probably not.

"What is this government going to do to make it all possible? That's where we need the help. We don't necessarily need the help with the phase-out dates, we just need the help to get there. That's what I'd like to see."

Denise Hawkins, Fleet Manager at Stannah

^[2] https://assets.publishing.service.gov.uk/media/5de6acc4e5274a65dc12a33a/Env-reporting-guidance_inc_SECR_31March.pdf



3

What are the challenges around greenwashing?

Fear of external scrutiny is a big hurdle for fleet decision makers. Almost half (40%) said it had caused increased stress and tension, while 43% are avoiding specific markets and 40% had softened their environmental targets. Facing increased pressure, 36% had delayed publishing environmental reports, while 31% have stopped reporting publicly.

Better information is vital for alleviating that bottleneck. A third (30%) of survey respondents said there wasn't enough knowledge of sustainability reporting within their company, while a lack of clarity about measuring the required data (30%) or which figures to report (25%) were also creating challenges for fleets.

Asked which measures would improve their confidence in that process:

- **46%** of respondents want to see a standardised reporting framework, with...
- **45%** seeking clearer guidance about the metrics involved.
- **52%** wanted better access to education from regulators and experts, while...
- **47%** are hoping for training programmes and...
- **46%** said sharing best practice with suppliers or partners could help.

Most importantly, businesses are demanding long-term stability. Although 70% of respondents agreed that the government engages well with fleets, a worrying 87% had slowed their fleet decarbonisation process because of shifting policies – such as changes to the 2030 non-hybrid phase-out date. Meanwhile, 43% said they would be more likely to accelerate their transition to net zero if those deadlines were more consistent.

31%

Almost one in three fleets are no longer reporting publicly due to fear of external scrutiny.

“Government regulations are heavily influencing fleets’ decarbonisation plans. At 38% of respondents, it ranked higher than cost (34%), climate change (34%) and customer demand – however, only 31% said they felt completely in control of that journey.”

“Expert guidance can help make that process more manageable. Our consultancy team has worked with countless fleets, providing strategic recommendations to help them meet ever-tougher targets and report those changes with confidence.”

Tim Laver, UK Managing Director, Ayvens



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How can decision-makers secure stakeholder buy in?

Transportation was responsible for 26% of the UK's greenhouse gas emissions in 2021, with 91% of that coming from road vehicles [3]. Despite some recent changes to the deadlines, sales of combustion engine cars and vans (including hybrids) will end in 2035, and manufacturers are already facing mandatory sales targets for zero-emission (at the tailpipe) vehicles. These increase each year, with large penalties for non-compliance [4].

As businesses set sustainability targets and benefit from generous tax incentives for low-CO₂ vehicles, fleet EV adoption is ahead of the wider market. More than 70% of new business contract hire (BCH) deliveries and almost all salary sacrifice cars were EVs in Q2 2024, according to the latest BVRLA data [5].

However, a smooth transition relies on buy-in from stakeholders and drivers:

- **35%** of decision-makers resistance from management and drivers had been one of the biggest challenges when deploying EVs.
- **56%** of fleets who had deployed EVs as part of their sustainability strategy said they had seen better employee retention and engagement as a result of net zero policies – that compares to 48% of the total sample.
- **48%** of EV fleets had introduced complementary initiatives such as route planning, driver training and vehicle maintenance to reduce energy and fuel use.

Most respondents recognised the importance of engaging with drivers. Almost all (92%) of the survey sample agreed that sustainability-focused driver training could deliver a more efficient fleet.

35% More than a third of fleets had faced driver or stakeholder resistance when deploying EVs.

Improving the driver experience

“When they're building charge points - and we've had this debate for the last two years - the spaces are too small for commercial vehicles. Our vans take up two spaces [and] if you go into a service station, the spaces are just fit for a car. If you stick a couple of vans in there, it's taken up the whole bank.

“New charging infrastructure needs to be more commercial vehicle orientated, and it's mega expensive on the road. Drivers can charge wherever they want, and the biggest frustration is having to have so many apps on their phone. We give our drivers a commercial fuel card, but that still doesn't do every charge point. All fuel card providers should just club together.

“We have a lot of engineers who take their larger vans home. They love the vehicle, but finding somewhere to charge in the morning, before they leave, is their biggest moan right now.”

Aaron Powell, Fleet and Logistics Director, SpeedyHire

[3] <https://www.gov.uk/government/statistics/transport-and-environment-statistics-2023/transport-and-environment-statistics-2023>

[4] <https://www.gov.uk/government/news/government-sets-out-path-to-zero-emission-vehicles-by-2035>

[5] <https://www.bvrla.co.uk/asset/BED67A76%2D42ED%2D40D7%2DA8C9493A22896D45/>



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How will AI help businesses optimise their fleets?

Artificial intelligence (AI) can support a more efficient operation by unlocking more value from a fleet's data. This enables much larger volumes of information to be aggregated and analysed, quickly spotting trends and highlighting opportunities to improve while minimising or avoiding operational disruption.

Almost all (98%) respondents believe AI will be an important tool for reducing CO₂ emissions, while 31% are already using it to help meet their sustainability targets. Asked what they saw as the biggest challenges for AI as a fleet management tool:

- **40%** of respondents believe AI is too difficult to use, while 23% reported concerns about job losses
- **32%** had faced resistance from customers and external stakeholders, rising to 46% among those who are already using AI
- **30%** said their business was concerned about data privacy and security issues, and this share was also larger (40%) among those who already use it.

There was a marked difference between different organisational structures. Sole fleet-decision-makers were much more likely to rate AI as "very important" (74%) than those who share that responsibility with other stakeholders (37%).

23%

Almost a quarter of fleet decision-makers said concerns about job losses were delaying the use of AI.

"Electric vehicles are a win-win for businesses; reducing costs and CO₂ emissions while demonstrating a commitment to sustainability that resonates with employees, customers and the environment where they operate. That human element is critical.

"By working closely with fleets, we've helped decision-makers demonstrate real-world financial and environmental benefits to other stakeholders while answering any drivers' concerns about going electric. We're also providing a range of flexible funding options, from short-term rental to salary sacrifice, supported by our unique in-house insurance proposition to make it easier to switch."

Tim Laver, UK Managing Director, Ayvens





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What operational changes will businesses need to make?

Curbing climate change and air pollution demands urgent reforms in the way businesses operate, and this is reflected in the survey responses. Almost all (98%) survey respondents expect a change of operating model over the next five years to meet the government's environmental regulations, while half (48%) expect this will be significantly different.

However, most also recognise that there are opportunities ahead – 91% of respondents said their business had benefited from aligning itself with the government's sustainability targets. Over half (54%) had improved their operational efficiency, while 43% said they were now able to access new customers and markets.

The results show several key trends driving fleets sustainability initiatives:

- **Utilisation:** 40% of respondents are sharing vehicles and optimising their load management to help downsize the fleet, while 34% are planning to do so. Fleets that already focus on utilisation rates were more likely to report a reduction operating costs (51%) than the overall average (40%) as a benefit of their sustainability strategy.
- **Electrification:** Fleets are enjoying wider business benefits as a result of deploying EVs. Almost two-thirds (63%) who said electrification was part of their sustainability strategy reported improvements to their reputation and brand image, while 49% had cut costs. That compares to 54% and 40% of the total sample.
- **Data:** 34% of the survey sample are using fleet management software or telematics – and uptake was, predictably, higher among those who have light-commercial vehicles (38%) or heavy-goods vehicles (45%).

Data is an important foundation for developing a robust decarbonisation strategy. Fleets who are using telematics and other management solutions were much more likely to say they felt “completely in control” of their company's sustainability journey (48%) than the overall average (31%).

Delivering value through data

“Sustainability is at the core of Biffa's business, and many of our customers choose us because of our commitment to it. That said, we're still seeing a gap between expectations and reality, particularly when it comes to cost. We have to be creative and find ways to meet these expectations, without pushing prices too high.”

“Telematics plays a key role in how we manage our fleet. It helps us track vehicle efficiency, route optimisation, and driver behaviour. Our vehicles don't operate like standard haulage trucks—they make frequent stops, which is tough on fuel consumption. Telematics allows us to monitor this and adjust accordingly. It's about using that technology to refine how we operate.”

“In some areas of our business, we've implemented managed services that analyse telematics data and provide feedback to drivers. We've found that this approach delivers real results, particularly when it comes to fuel savings and safety. Safer driving often translates to lower carbon emissions, so the two go hand in hand.”

Darren Judd, Head of Fleet Development, Biffa



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How are incentives affecting the business case for EVs?

Advancing battery technology and economies of scale are eroding the traditional cost barrier of adopting electric vehicles. According to the latest BloombergNEF analysis, the cost of a battery pack – which has been the most expensive part of an EV – had fallen by 82% between 2013 and 2023 [6], while new cell chemistry is expected to deliver further reductions in the coming years.

Although incentives have wound down in recent years, fleets can still access a package of financial support to help deploy EVs.

- **Capital Allowances:** Businesses can write down 100% of the lease cost for cars emitting 50g/km CO₂ or less, or 100% of the purchase cost for zero-emission (electric or fuel cell) models against their pre-tax profits [7, 8].
- **Purchase Incentives:** The Plug-in Van Grant provides funding of up to £5,000 (or 35% of the list price) towards a new light commercial vehicle, which helps bring pricing closer to a diesel equivalent [9].
- **Company Car Tax:** Ultra-low rates for vehicles emitting 50g/km CO₂ or less, including a 2% rate for electric vehicles until April 2025, offer significant Benefit-in-Kind incentives for drivers and reduced Class 1A National Insurance Contributions for employers. Those incentives also apply to low-CO₂ vehicles on salary sacrifice schemes, which can be made available to all employees.
- **Vehicle Excise Duty:** Although annual renewals will be equalised across all fuel types from April 2025, low-CO₂ vehicles will continue to benefit from significantly lower VED rates at the point of registration [10]

It's notable that only 29% of survey respondents said the higher cost of EVs was affecting adoption. That compares to 39% who are struggling with limited vehicle options to meet their needs, and 34% who said they need more guidance.

98% share of businesses expecting operational change over the next five years.

“Data has never been more accessible, or more valuable, for fleets. Telematics and fleet management software can help identify drivers who need additional training, highlight under-utilised assets and ensure routes are optimised – all of which can support a more sustainable and cost-efficient operation.”

“Ayvens’ TCO+ solution takes this a step further. This can demonstrate a robust business case for different vehicles – including opportunities for electrification – based on fleets’ real-world data, operational needs and factors including downtime and repair costs.”

Tim Laver, UK Managing Director, Ayvens

[6] <https://about.bnef.com/blog/lithium-ion-battery-pack-prices-hit-record-low-of-139-kwh/>
 [7] <https://www.gov.uk/capital-allowances/business-cars>
 [8] <https://www.gov.uk/hmrc-internal-manuals/business-income-manual/bim47725>
 [9] <https://www.find-government-grants.service.gov.uk/grants/plug-in-van-and-truck-grant-1>
 [10] <https://www.gov.uk/government/publications/autumn-budget-2024-overview-of-tax-legislation-and-rates-ootlar/annex-a-rates-and-allowances>



Where are fleets plugging in?

The UK already has one of Europe's most advanced public charging networks, comprising more than 71,000 units at 36,000 locations at the end of October 2024, according to Zap-Map [11]. It's an important foundation for growing the EV market, and the government has set a target of 300,000 chargers by 2030 to keep up with demand [12].

However, fleets' experiences were mixed. Although most (86%) rated the local availability of charging stations and alternative fuels as "good" or "excellent", 36% said this infrastructure had been a big challenge when deploying EVs.

Among those who cited charging and refuelling as a bottleneck:

- **41%** had experienced increased costs as a result of their decarbonisation strategy, compared to an overall average of 37%.
- **41%** reported inefficient use of resources, whereas this was only 32% across all respondents.
- **36%** said their operations had been delayed, compared to 32% of the total sample.

There are also signs that charging infrastructure is better suited to specific vehicle types. Respondents with LCVs and HGVs were much more likely to report challenges with charging – at 40% and 45% respectively – when deploying EVs than the overall average (36%).

40% Four in ten van fleets said a lack of charging infrastructure was affecting their EV strategy.

"Excluding productivity and assuming you can home charge, then whole life cost is probably comparable, if not cheaper than, diesel. If you put productivity into the equation, then unfortunately EVs do become more expensive because you have to have some time for charging."

"About 30-35% of our patrols have driveways. We've gone for the volunteers where we can install a home charger and we're holding their hands through that process - making sure they're part of the journey, as are stakeholders for workforce representation, unions etc."

"The challenge comes when there's no driveways left, which is why we look at alternative ways of charging vans. That either hits productivity during work time, because drivers have to charge before a shift or end of shift, or we've got to find an alternative to a wallbox."

Tim Laver, UK Managing Director, Ayvens

[11] <https://www.zap-map.com/ev-stats/how-many-charging-points>

[12] <https://www.gov.uk/government/news/government-sets-out-path-to-zero-emission-vehicles-by-2035>



How can fleets build a robust charging ecosystem?

Developing an effective charging strategy including home, workplace and public networks is an important step towards a more sustainable fleet, maximising operational efficiency while also managing costs.

A comprehensive charging ecosystem could provide:

- **Cost control:** Home and workplace charging can significantly reduce the cost of charging an EV. For example, a Volkswagen ID3* would cost 20p per mile at the fastest DC public chargers [13] compared to 6p if it's charged at the latest Ofgem-capped rates [14] or 2p charged overnight on a low-rate Octopus tariff [15].
- **Cleaner energy:** Workplace chargers can be integrated with energy management solutions, reducing the need for expensive and time-consuming grid connection upgrades by controlling demand. This could also help reduce Scope 2 emissions – 46% of EV fleet operators had invested in renewable energy tariffs or generation.
- **Convenience:** A connected ecosystem can enable fleet managers to automate reimbursement across home, workplace and public chargers and schedule depot-based charging sessions to suit operational needs.

46%

Almost half of fleets with EVs are investing in or generating energy from renewable sources.

There are several government initiatives targeting a more comprehensive charging network:

- **Public charging:** From November 2024, all DC rapid charging points (with an output of at least 50kW) and new units with an output of 8kW must offer contactless payments and clear pricing, while networks must guarantee 99% uptime and a 24/7 staffed helpline [16].
- **Workplace charging:** Businesses can claim up to £350 (or 75%) per socket towards the equipment and installation costs for up to 40 charging outlets [17]. There is also a Benefit-in-Kind exemption for employees using those chargers, even if they're topping up for private journeys [18].
- **Home charging:** Drivers in flats and rented accommodation or homeowners without off-street parking can also claim £350 (capped at 75%) towards installing a domestic charging point [19, 20]. Employer-funded home installations are also Benefit-in-Kind exempt [21].

“A connected charging ecosystem can overcome some of the biggest hurdles fleets face deploying EVs, and it’s important to get that strategy right. Working with fleets, Ayvens has developed a portfolio of products including wallboxes and charge cards to offer more visibility, while our turnkey solution is tailored to meet customers’ unique operational needs”

Tim Laver, UK Managing Director, Ayvens

* Pro Match at 4.1miles/kWh

[13] <https://www.zap-map.com/ev-stats/charging-price-index>

[14] <https://www.ofgem.gov.uk/news/changes-energy-price-cap-between-1-october-31-december-2024>

[15] <https://octopus.energy/compare-ev-tariffs/>

[16] <https://www.gov.uk/government/publications/the-public-charge-point-regulations-2023-guidance/public-charge-point-regulations-2023-guidance>

[17] <https://www.find-government-grants.service.gov.uk/grants/workplace-charging-scheme-2>

[18] <https://www.gov.uk/hmrc-internal-manuals/employment-income-manual/eim01035>

[19] <https://www.gov.uk/electric-vehicle-chargepoint-grant-household>

[20] <https://www.find-government-grants.service.gov.uk/grants/electric-vehicle-chargepoint-grant-for-households-with-on-street-parking-1>

[21] <https://www.gov.uk/hmrc-internal-manuals/employment-income-manual/eim23900>



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How can businesses harness connected and shared mobility?

Sustainable mobility is broader than electric vehicles. For example, a driver travelling from London to Glasgow in an EV would emit two thirds less CO₂ than they would in a petrol or diesel car, according to the latest Department for Transport data. However, using a coach or train for the same journey would both result in an even lower carbon footprint [22].

Fleets are already looking beyond traditional car and van journeys:

- **27%** are reducing their reliance on road vehicles and downsizing the fleet to meet their environmental commitments, while 21% plan to do so
- **29%** have introduced cycle to work schemes or are encouraging the use of public transport, while 33% said this is part of their future strategy
- **31%** said they are actively exploring micromobility solutions, such as drones, e-bikes, autonomous vehicles and transport hubs – a further 24% said this is on the horizon.

There are regional variations within that data. Businesses headquartered in London were twice as likely to be using public transport (41%) and more than 50% more likely to be exploring micromobility solutions than those based elsewhere.

31%

Less than a third of fleets are actively exploring micromobility solutions.

“We started by thinking ‘what’s the cheapest van to run?’ – well, it’s not to have a van at all. We trialled using public transport, saying to [employees] we’ll put all your jobs in central London within a 200-metre radius of a tube station on the Central Line. Come in, pick up the equipment you need from HQ – we got a big tool case on wheels – and engineers went off, and did their day’s work. It was fine.

“The next trial is where we’re going to try doing a whole week’s worth of work and see how somebody finds it. Our main reason for doing that is cost – instead of running a van for £50 for the day in total operating costs, it’s the cost of a £10 travel card for getting around in central London. It also beats the traffic.

“As a secondary benefit, it’s also accessing a different labour pool – people who might not drive, or want to drive, or who work part time. Essentially, they’re walking into work with their phone, wallet and ID badge and not having the whole infrastructure of a van or company car and all their tools and equipment around them.”

James Welton, Fleet Manager

[22] <https://www.gov.uk/government/statistics/transport-and-environment-statistics-2023/transport-and-environment-statistics-2023>



Is multi-modal mobility fit for purpose?

Mobility-as-a-Service (MaaS) – platforms that enable users purchase end-to-end transport across different modes – is still in its infancy in the UK. However, there are several initiatives focused on driving adoption:

- The government's **MaaS Code of Practice**, published in 2023, sets out guidelines for suppliers to combine services in a single source. This includes prioritising mass transit, active travel and zero-emission vehicles, and measures to ensure different options are transparent, accessible and inclusive [23].
- The ZEV Mandate includes **shared mobility credits** encouraging manufacturers to sell electric vehicles into car clubs – they are counted 1.5 times towards mandatory targets [24]. Car club membership increased 38%, to 767,899, between 2020 and 2023 according to the Department for Transport [25].
- There are 22 **e-scooter sharing schemes** across England [26], assessing how these could alleviate pressure on public transport, provide an alternative to cars for local journeys and reduce CO₂ and pollutant emissions. However, it's still illegal for businesses to operate their own e-scooter fleets and use them on public roads or walkways [27].

Ayvens customers are already demanding a seamless digital journey, and alternative mobility is a logical next step in that development.

Our efficient, end-to-end mobility platform will deliver self-service tools, streamlined processes for businesses and enhanced capability across our portfolio of solutions. This will enable us to launch new solutions at scale, and adapt quickly to an evolving mobility landscape.

38% Reported rise in car club membership, 2020-2023 (source: DfT)

“The mobility ecosystem is increasingly diverse, and there’s a clear appetite among corporate fleets to explore alternative modes of transport as part of reducing their environmental footprint. However, those solutions often aren’t mature enough yet.”

“Ayvens’ international footprint enables us to share best practice with markets, and help customers who want to get ahead of those trends. Our expert consultancy team can help customers analyse their needs and develop a cost-efficient mobility system to match, while delivering reduced CO₂ emissions.”

Tim Laver, UK Managing Director, Ayvens

[23] <https://www.gov.uk/government/publications/mobility-as-a-service-maas-code-of-practice/mobility-as-a-service-code-of-practice>

[24] <https://assets.publishing.service.gov.uk/media/6554be55544aea000dfb2d59/zev-mandate-consultation-final-cost-benefit-analysis.pdf>

[25] <https://www.gov.uk/government/publications/car-clubs-local-authority-toolkit/car-clubs-local-authority-toolkit#types-of-car-club>

[26] <https://www.gov.uk/government/publications/e-scooter-trials-guidance-for-local-areas-and-rental-operators/e-scooter-trials-guidance-for-local-areas-and-rental-operators>

[27] <https://www.gov.uk/government/publications/powered-transporters/information-sheet-guidance-on-powered-transporters>





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