

2023:

# The Road Ahead

Putting fleet managers in the  
driving seat of modernisation.



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# Foreword

**The Association of Fleet Professionals (AFP) is the collective voice of national fleet operators in the UK. Our mission is simple – to improve market conditions for everyone involved in running a corporate fleet in the UK.**

This report, by AFP Members Samsara, highlights the pressures fleet managers and their drivers face each and every day.

The clear message from this research is that there isn't one particular issue concerning fleet managers – be it safety, efficiency, reducing cost, or reducing carbon.

They are concerned by them all. Which this report shows loud and clear.

But, our fleet leaders are nothing if not pragmatic, resilient, and used to a challenge. And their willingness to embrace technology to help optimise their fleet will certainly go some way to address the issues they face.

**Association of Fleet Professionals**

“If we are to prevent the UK from seizing up, we have to address the issues facing fleet managers and drivers.”



# Executive Summary



By Philip van der Wilt,  
SVP and GM EMEA,  
Samsara

**Without fleet managers — and the army of drivers who shift manufactured and consumer goods, food, and agricultural products in the UK — the world as we know it would simply grind to a halt.**

That’s not hyperbole. We saw a glimpse of what could happen during the global supply chain disruption in the wake of the COVID-19 pandemic, the lockdowns, and the knock-on effect at national and local levels.

Goods and raw materials — everything from construction materials and garden furniture to computer chips and consumer goods — were in short supply. So too were drivers.

Eighteen months on from the height of the 2021/22 driver shortage, we interviewed 150 fleet and logistics managers and more than 1,000 commercial drivers in the UK to try to understand how this vital sector is performing in the wake of the turmoil.

The results underline what many people fear — while the pandemic may be history, many of the issues unearthed during that turbulent time remain.

Nearly all (97%) of the 1,000 commercial drivers surveyed acknowledge there’s a driver shortage. In a bid to counter this issue, the obvious response is to beef up recruitment programmes to attract more people into the industry.

But this would only be a short-term fix.

For while there is a need to recruit more drivers, there is also a need to focus on retention. Of the drivers surveyed, nearly half (45%) said they are ‘very likely’ or ‘quite likely’ to leave their current job in 2023. What’s more, two thirds (65%) are so unhappy with the current state of affairs they are prepared to consider industrial action in 2023.

On their own, these findings are an eye opener. Together, they suggest deep-seated unrest that, unless resolved, could lead to further disruption to the UK supply chain.

Speaking to fleet managers, it’s clear this is a problem on their radar. Driver shortages and issues around recruitment and retention are key concerns for 2023. But they’re not the only ones.

Scanning their long list of priorities for 2023, fleet managers have more than their share of the weight of the world on their shoulders.

They are constantly firefighting problems. Everything from keeping a lid on costs and fluctuating fuel prices to improving road safety and the spread of low emission zones. Plus, they need to upgrade their fleets as part of the transition to electric vehicles (EVs) and alternative fuel sources.

The long list of challenges facing fleet managers — of which the driver shortage is just one item — may lead some to conclude that the industry faces a near impossible task.

I disagree. Yes, the road ahead is bumpy. But progress is being made. As a sector that has typically been underserved by technology, we need to explore what role data and digital systems can play.

The findings contained in this report make it clear that there is an appetite among both fleet managers and drivers to adopt more technology.

For drivers, it makes sense. Why should they have a smartphone in their pocket that allows them to shop online, carry out financial transactions, and view on-demand video, but have to rely on pen and paper to carry out everyday tasks?

For fleet managers, many of the issues they face — route planning, improving fleet efficiency, driver safety, and transitioning to EVs — can be aided by technology.

And for business owners, technology can drive efficiencies that make them more competitive while freeing up funds to invest in their people on the frontline.

If we are to prevent the UK from seizing up, we have to address the issues facing fleet managers and drivers. It is too important to ignore.

## Research approach:

Samsara commissioned 150 online interviews with fleet or logistics managers in the UK with direct responsibility for vehicles, drivers, logistics, supply chain and/or field service operations, carried out from 15 to 24 February 2023. An additional survey of 1,000 UK commercial drivers was carried out between 14-21 February 2023. All research conducted adhered to the UK Market Research Society (MRS) code of conduct (2019).



# 2023: A Challenging Year Ahead For Fleet Managers

## Fleet managers have got a lot on their plate.

The list of priorities for fleet managers — which includes upgrading their fleet, reducing costs, investing in technology, recruiting more drivers, improving efficiency, improving road safety, digitising manual processes, and moving to electric vehicles (EVs) — is so long it's almost impossible to know where to start.

And that, perhaps, is one of the biggest problems facing fleet managers today.

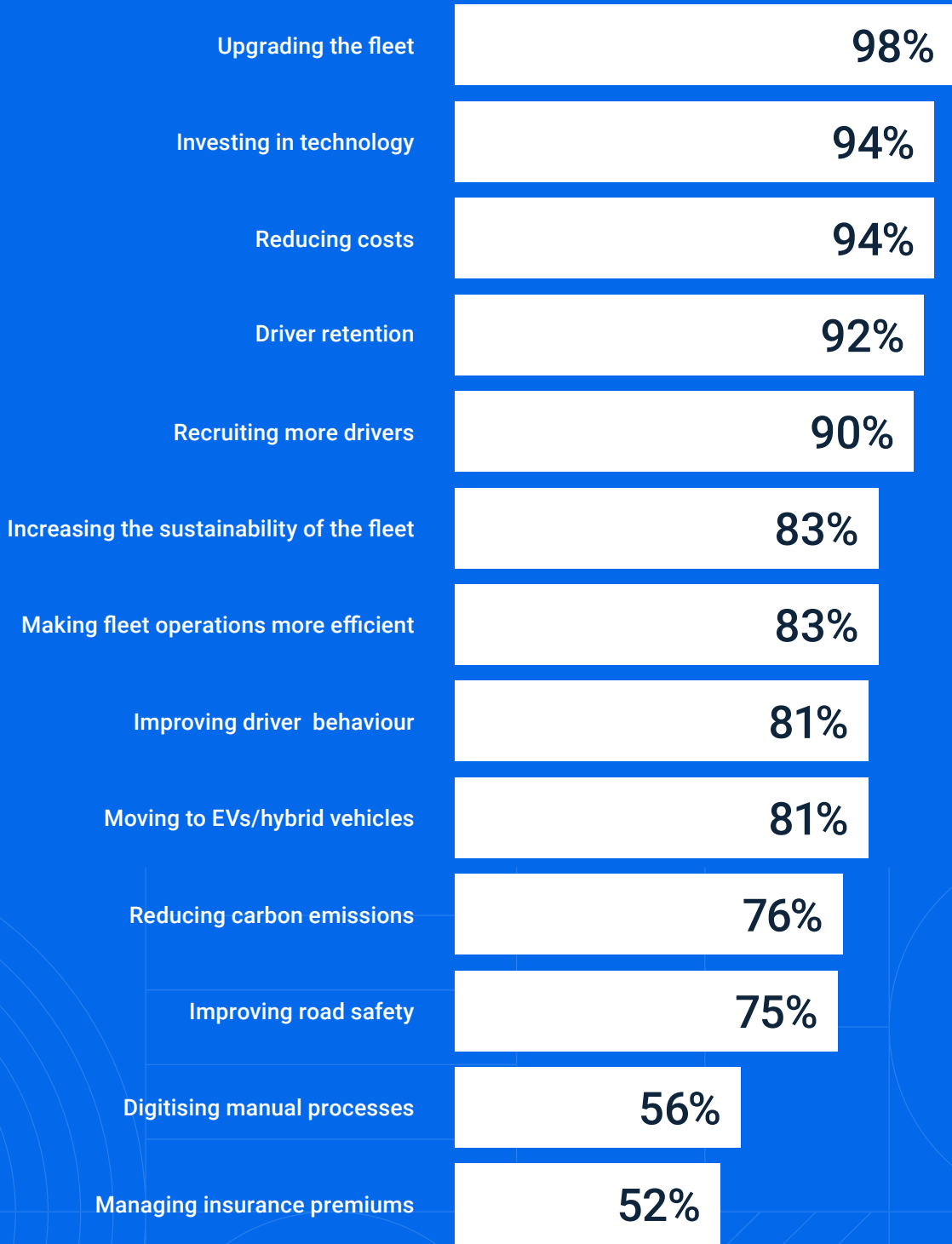
The length of the 'to-do' list — where everything is a priority — means constantly running just to stand still.

If nothing else, this huge workload goes some way to explain why so much time is focused on day-to-day operational matters rather than longer-term projects. And yet, fleet managers have to find time in their busy schedules to plan for the future — or risk falling behind.

But it's not easy. Priorities can chop and change depending on what's around the corner. A recent drop in fuel prices after a particularly costly and protracted spike, for example, means that problem can be parked (for the time being at least). But there's always another problem to take its place.

In other words, priorities shift depending on what's happening in the real world of supply chains, physical operations, and logistics.

## Fleet manager priorities for 2023:







**“There isn’t one particular issue concerning fleet managers – be it safety, efficiency, reducing cost, or reducing carbon. They are concerned by them all.”**

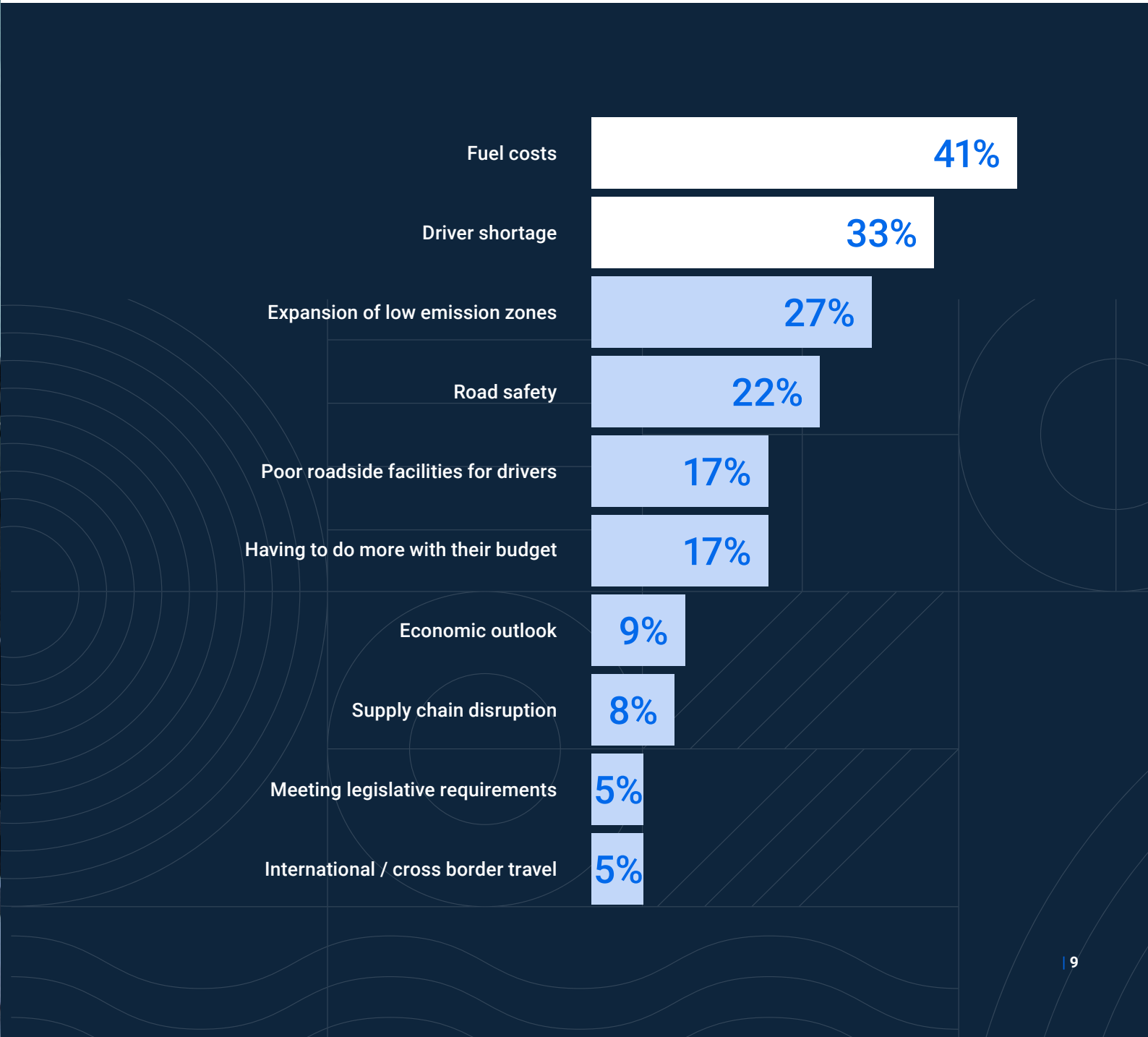
**Association of Fleet Professionals (AFP)**

# Key Concerns In 2023

It should come as little surprise that fuel costs (41%) and the ongoing driver shortage (33%) are the top two concerns of fleet managers for 2023

Yet the expansion of low-emission zones (27%) not just in London, but in a growing number of towns and cities across the UK, is also creating a headache around the day-to-day operation of fleets in terms of route planning and additional costs.

So too is road safety (22%) and the constant pressure to run their fleet without any additional budget or resource (17%).





# Driver Shortages: Why We Should All Be Worried

Part of the problem fleet managers face is that many of the issues are out of their hands

The cost of fuel, for example, is determined by global markets and tax levels set by the Exchequer. And the imposition of clean air zones is driven by local and regional government.

But when it comes to knowing about the driver shortages, fleet managers are not alone.

Drivers are also clearly aware of the pressure, with almost all (97%) agreeing there is a shortage.

The question is, why?


Half of drivers (49%) believe it's down to demanding hours, four in 10 (42%) blame the low wages, while a third (36%) cite inflexible hours.

Poor roadside facilities — so often quoted as one of the reasons why the industry fails to recruit enough drivers — were singled out by one in five (18%) of those questioned.

**97%** of drivers agree there is a driver shortage in the UK







**“Time is running out to address the UK’s driver shortage. The possibility of mass walkouts should be a wake-up call to everyone — including the very top of government.”**

**Philip van der Wilt,  
SVP and GM EMEA, Samsara**

## The Consequences Of Inaction

**While much of the focus regarding driver shortages veers towards recruitment, fleet managers would be wise not to ignore the concerns of those already in the job.**

There is a growing undercurrent of driver discontent that could result in an exodus of drivers fed up with their daily grind.

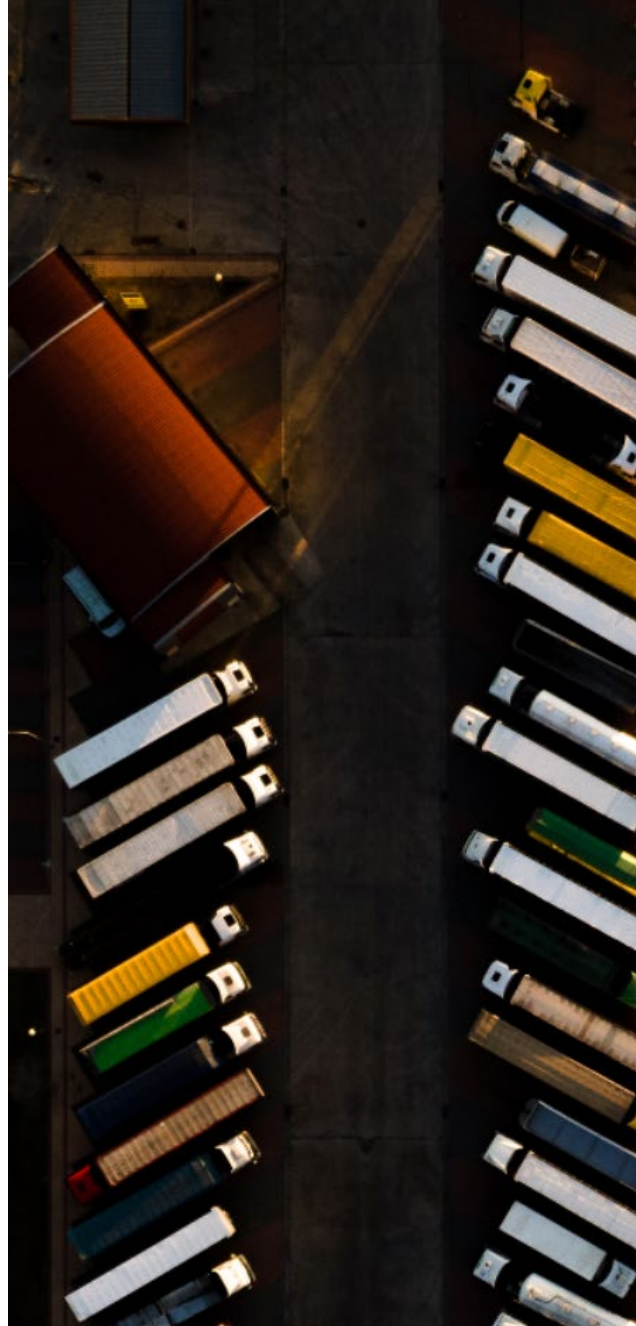
When pressed, nearly half (45%) of drivers said they were ‘very likely’ or ‘quite likely’ to leave their current job during 2023. It’s a warning sign for fleets — and a red flag for the wider UK economy.

Worse, unless driver grievances are addressed, there is a very real danger it could lead to strike action, as 65% of the UK’s drivers are prepared to consider industrial action in 2023.

If this threat went ahead, it would likely cause untold damage and disruption to supply chains, people’s lives, and the economy.

Without doubt, these findings from our research are the most worrying. Few people dispute there are driver shortages. But the extent of dissatisfaction — in terms of drivers either leaving the profession or walking out on strike — is sobering.

It may be the hurry-up that fleet managers and other leaders within fleet-based operations need in order to address driver shortages.



**65%**  
of the UK’s drivers  
would consider  
going on strike  
in 2023



# The View From The Fleet Manager's Office

What's clear is that there is a real appetite among fleet managers to tackle the driver shortage.

Making the profession more attractive and doing more to improve safety is universal.

But so too is a recognition that the issue of driver recruitment and retention is far more complex than simply paying drivers more.

Instead, it requires a range of measures including training programmes, flexible working, and the use of technology to reduce paperwork and streamline workloads.



## % of fleet managers who place importance on the following for their workforce:



Thankfully, when it comes to this particular issue facing the industry, both drivers and fleet managers are on the same page.



# The View From Behind The Wheel

Perhaps it should come as no surprise that half (49%) of drivers are calling for better wages along with increased incentives and rewards.

On that issue at least, the message is clear.

Drivers want — and expect — to be paid a fair wage for the job they do, something that has become even more acute during the recent squeeze on incomes.

They also want greater flexible working options (40%), a nod to the fact that their work often involves unsocial hours and long periods away from home.

And for those who spend the most time on the road, there is a continued call for improved roadside facilities.

When pushed, almost six in 10 drivers said investment in well-lit parking and good washroom facilities would attract new drivers. Around half also believe these investments would attract more women into the heavily male-dominated industry.



## % of drivers who say job satisfaction would increase with the following:





# Why There Are No Easy Answers

What's clear is that solving the driver shortage is no easy task. In many cases, the issues identified by both fleet managers and drivers overlap, even if they are not in complete lockstep.


Both want to see driving become a much more attractive profession. Better training, a focus on skills, a clear career path, and opportunities for personal development will be key to achieving this.

The issue of decent roadside facilities and services for drivers out on the road still needs to be fully addressed.

And at a time when increases in the cost of living are squeezing household incomes, there's little wonder that drivers want an increase in wages as part of a more attractive remuneration package.

What makes this issue such a priority for fleet managers in 2023 is that unless these issues are addressed, drivers may decide that enough is enough and opt to take industrial action to force change — or simply leave the profession altogether.

If that's not enough to put at the fleet manager's door, as the research points out, the driver shortage is just one of a big range of priorities.

A smiling man in an orange high-visibility jacket stands next to a red truck. The truck has a white checkered pattern on its side. A large blue circle is overlaid on the right side of the image, containing a quote.

“Improving the kerb appeal of driving as a profession is something we all need to take seriously. The complex causes underlying underinvestment in the industry will need imaginative responses.”

Naz Khanom, Head of People,  
Lanes Group Plc



% of drivers who believe the following technologies would have a positive impact on their job:



# The Role Of Technology In Addressing The Issues

One of the common themes that emerged from the research is the role that technology can play in creating a modern fleet for drivers and fleet managers.

Drivers have given technology a thumbs up believing it could have a positive impact on their job.

At the same time, fleet managers clearly understand the role technology has to play in making improvements right across their operation.

The recognition that technology has a significant role in a modern fleet may help to address some of the issues raised by drivers. But technology can also help to tackle the ever-changing list of priorities encountered by fleet managers.

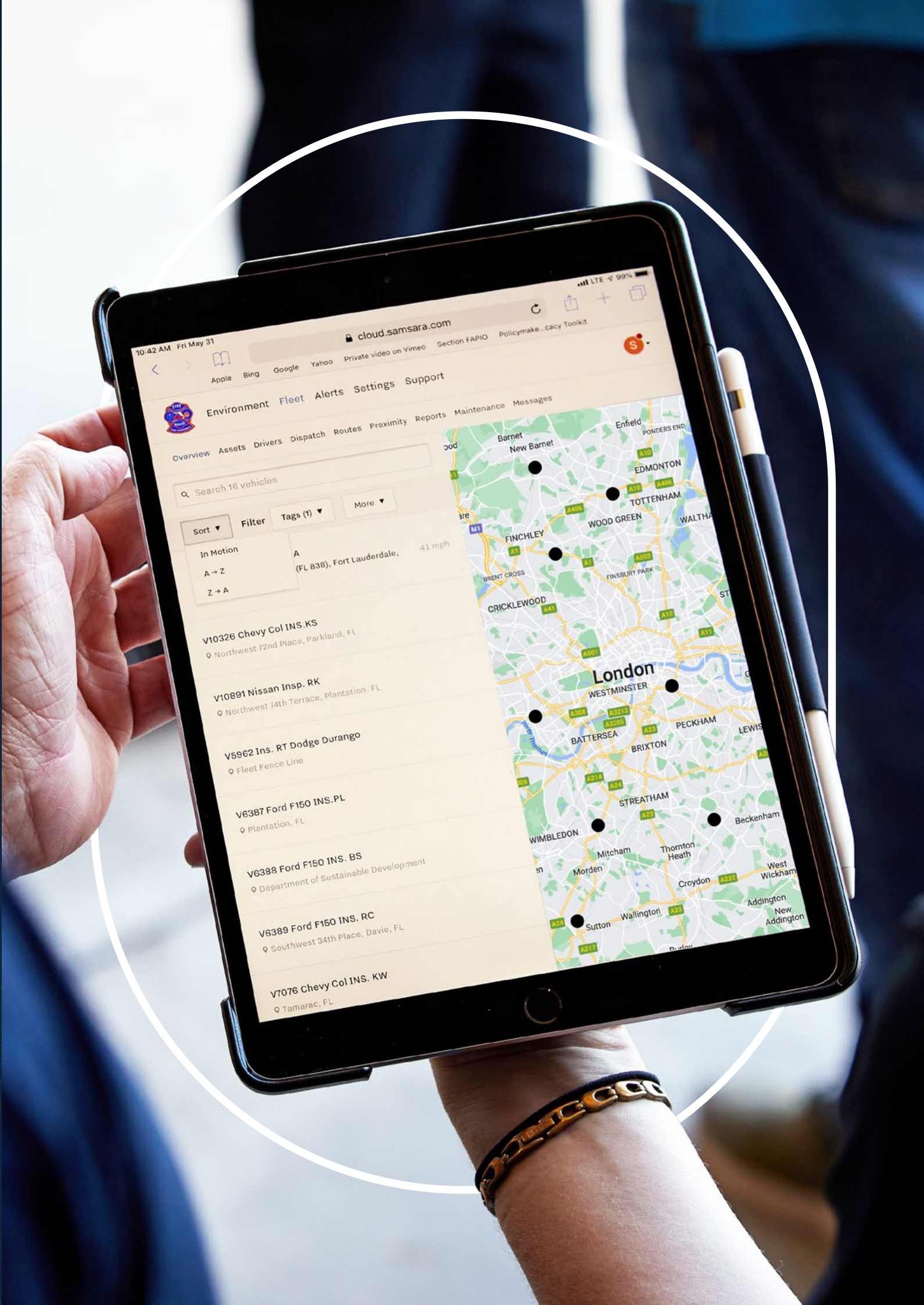
For those fleets that have already gone down this road, understanding the role of technology is the first step on their journey to digital transformation – whether they know it or not.

That’s because smart technology can help to address all the issues raised by fleet managers, including the top three concerns of fuel prices, the expansion of clean air zones, and driver recruitment and retention.





% of fleet managers who agree technology can significantly help them:





# Using Technology To Address The Top Three Concerns For 2023

Smart, connected digital technology that spans the business and operational needs of an entire fleet is pivotal to long-term success. In the past, the technology supporting fleets tended to be siloed and one-dimensional. Today, Samsara's joined-up platform uses rich data to provide unparalleled insights to address the issues facing fleet leaders.

01

## Fuel costs

Even though diesel prices have fallen from the peaks of summer 2022, they are still nowhere near the lows of 2020. Which is why many fleet managers are turning to technology to reduce overheads.

Connected telematics can identify fuel waste in areas such as unnecessary engine idling and aggressive driving. Even small changes in driver behaviour can deliver significant cost savings when multiplied across a fleet.

It's also one of the factors why the transition to electric vehicles (EVs) and other alternative fuel sources is gaining so much interest.

02

## Low emission zones

While there are environmental benefits in creating low-emission zones, it also comes at a cost to fleet operators looking to carry out their everyday operations.

The adoption of cleaner, more efficient vehicles will go some way to address this issue. For some, it's the catalyst for transitioning their fleets to EVs.

But this is not without risk, which is why fleets are turning to business-defining data insights to manage the smooth transition to EVs.

In the meantime, fleets are using technology to improve routing and maximise operational efficiency to minimise disruption.

03

## Driver shortage

The 2021/2 driver shortage that dominated the news headlines, saw the UK Government, industry bodies, employers, and other stakeholders look to increase recruitment and retention.

But despite the launch of nationwide initiatives around driver training and campaigns to improve roadside facilities, the problems still exist.

Without drivers, even the most efficient and environmentally friendly fleets are going nowhere. Creating a motivated, engaged workforce is something fleet managers still have to tackle.

Using technology to improve safety, streamline workflows, and save time is one way to help.

“For too long, commercial fleets have been underserved by the types of technology that have transformed other sectors and industries. Thanks to affordable, connected, smart tech, fleets have the opportunity to make their operations safer, more efficient, and more sustainable.”

Tony Draper, Head of SHEQ,  
MGroup Services Plant  
& Fleet Solutions Ltd



# What The Samsara Platform Can Do



## SAFETY

Protect teams with AI-enabled cameras and coaching



## TELEMATICS

Manage fleets in real-time from one dashboard



## EQUIPMENT MONITORING

Track and manage equipment, trailers, and other assets



## SITE VISIBILITY

Manage facilities and remote sites with video security



## COMPLIANCE

Simplify regulatory compliance and avoid violations



## MAINTENANCE

Maximise uptime and minimise maintenance costs



## WORKFLOWS

Automate key workflows across fleet operations



## REPORTING

Turn real-time data into actionable insights and reports



## DATA & INTEGRATIONS

Connect data across key apps and systems



## SUSTAINABILITY

Improve sustainability and cut environmental impact



## EFFICIENCY

Reduce costs and boost productivity across the business



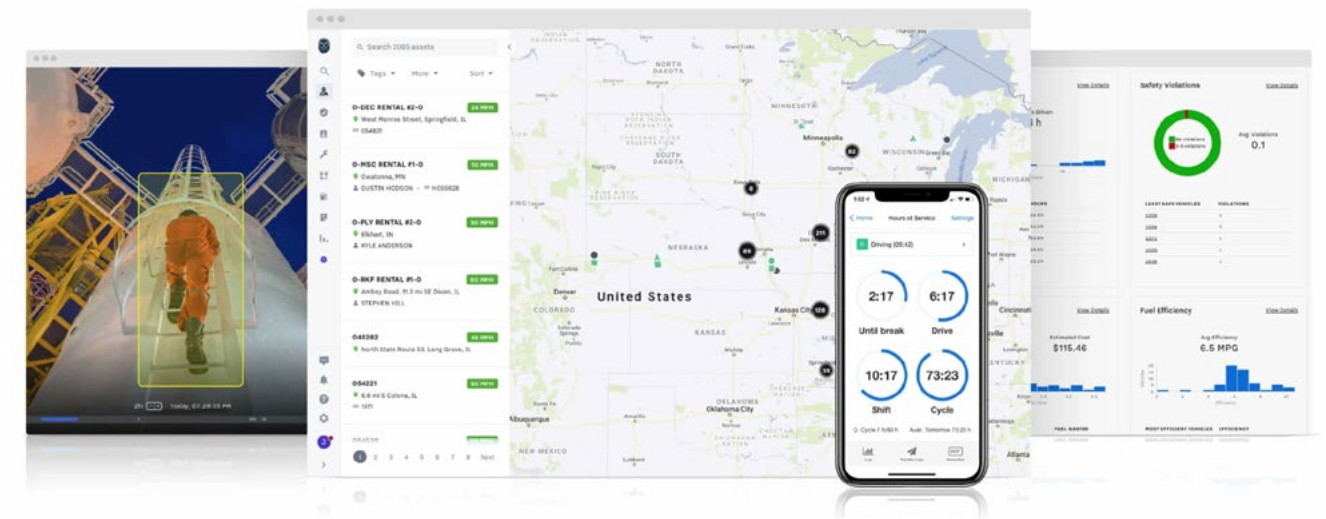
## SECURITY

Identify and act on important security risks

# About Samsara

Samsara's mission is to increase the safety, efficiency, and sustainability of the operations that power the global economy.

Through our Connected Operations Cloud, we're empowering businesses that depend on physical operations to harness IoT data to develop actionable business insights that improve their operations and the driver experience.



We're already working with hundreds of UK fleet leaders across a wide range of industries, including transportation, wholesale and retail trade, field services, logistics, utilities and energy, manufacturing, and food and beverage, to take their operations to a whole new level.

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