GEOTAB

GEOTAB REPORT 2026

Connected fleets in Europe

INDUSTRY

GENERAL FREIGHT

FLEET COSTS

FUEL CONSUMPTION

GPS TRACKING

PRODUCTIVITY

TACHOGRAPH/REGULATORY COMPLIANCE

CUSTOMER SERVICE

Contents

About this report

In this first edition of the Geotab Report 2026: Connected Fleets in Europe we dive into how Europe's leading fleets are using fleet management solutions to improve road safety, increase operational efficiency, enhance performance, and lower fleet costs.

This report delivers data-driven insights on fleet management benefits, real-world video telematics results, and asset tracking best practices, based on findings from 1,817 fleet managers and mobility experts across Europe's key industries, highlighting measurable outcomes from real fleet operations. The data presented in this report covers the period from January 1, 2025 to December 31, 2025, and is based on survey responses from fleet and operations decision-makers across organizations of varying sizes and industries in Europe.
A survey conducted by ABI Research for Geotab.

To learn more, visit geotab.com/ie/

Message from the Senior Vice President EMEA

Geotab is committed to ensuring fleet intelligence is accessible to operators of every size fleet. Our insights support lean teams and tight margins, with a keen focus on ROI. The data insights in this report reflects the strong foundation European SMBs have already built. Now is the time to advance these efforts with the advancements in AI, video technology, and an exceptional ecosystem of Geotab partners. This way we ensure the future success of every fleet travelling Europe's roadways.

Edward Kulperger
Senior Vice President EMEA, Geotab

A vision for 2026

I am pleased to share the 2026 report on connected fleets in Europe. The sector continues to face a relentless set of challenges: from operational efficiency and rising fuel and energy costs to safety and escalating insurance premiums. For small and mid-sized fleets, which make up the backbone of European commercial transport, these pressures represent a constant test of operational resiliency.

A 10% increase in fuel costs or a week of vehicle downtime creates a significant impact on a lean operation. For an SMB running 10 vehicles, the direct performance of each asset and driver is the difference between a vulnerable business and a resilient one. This is why every data point matters. When data is used to anticipate risks and optimize performance, it builds a critical buffer against market volatility, ensuring each vehicle contributes its maximum value directly to an organization's profitability.

Across small and medium fleets, GPS tracking has delivered on its core promise: compliance achieved, costs reduced, and productivity gains, with the majority reaching a positive ROI within twelve months. For fleets that were managing via spreadsheets only a few years ago, this is a meaningful shift.

When asked what SMB operators are focused on, our research noted two critical areas: meeting customer expectations and managing driver fatigue and safety. These are the daily pressures that determine whether a business retains contracts and keeps drivers on the road.

Often the tools best suited to addressing these concerns are underused by SMB fleets. For instance video telematics which tackles driver fatigue, reduces incident costs, and protects from false claims is deployed by less than half of small fleets, compared to nearly two-thirds of enterprise operations. Regardless of fleet size however, there is consistent feedback that when these data insights are used measurable improvements in driver safety are reported and higher rates of false claims are successfully challenged.

Geotab is committed to ensuring fleet intelligence is accessible to operators of every size fleet. Our insights support lean teams and tight margins, with a keen focus on ROI. The data insights in this report reflects the strong foundation European SMBs have already built. Now is the time to advance these efforts with the advancements in AI, video technology, and an exceptional ecosystem of Geotab partners. This way we ensure the future success of every fleet travelling Europe's roadways. A survey conducted by ABI Research for Geotab.

Edward Kulperger
Senior Vice President EMEA, Geotab

About Geotab

Our mission is to make the world safer, more efficient, and sustainable

Geotab is a global leader in connected vehicle and asset management solutions, with headquarters in Oakville, Ontario and Atlanta, Georgia. Our mission is to make the world safer, more efficient, and sustainable. We leverage advanced data analytics and AI to transform fleet performance and operations, reducing cost and driving efficiency. Backed by top data scientists and engineers, we serve approximately 100,000 global customers, processing 100 billion data points daily from more than 5.8 million vehicle subscriptions. Geotab is trusted by Fortune 500 organisations, mid-sized fleets, and the largest public sector fleets in the world, including the US Federal government. Committed to data security and privacy, we hold FIPS 140-3 and FedRAMP authorisations. Our open platform, ecosystem of outstanding partners, and Geotab Marketplace deliver hundreds of fleet-ready third-party solutions. In 2025, we celebrated 25 years of innovation.

6M
vehicle subscriptions worldwide

>100B
data points processed daily

100K+
customers globally

700
partners

530
Geotab Marketplace solutions

3,400+
employees in 21 countries

26+ years driving transformation

Operating worldwide **160 COUNTRIES**

Learn more at www.geotab.com/ie/ and follow us on LinkedIn or visit Geotab News and Views.

2025 Year in review

RANKED #1 COMMERCIAL TELEMATICS VENDOR WORLDWIDE
for four consecutive years by **ABI Research**

FAST COMPANY BEST WORKPLACES FOR INNOVATORS 2025

Frost & Sullivan
2025 NORTH AMERICAN COMMERCIAL VEHICLE FLEET MANAGEMENT COMPANY OF THE YEAR

$200M USD (172M €)
invested annually in research and development

RANKED #1 COMMERCIAL VIDEO TELEMATICS PROVIDER

Completed a
MATERIALITY ASSESSMENT

Offices opened in Metro
DETROIT AND DUBAI

670+
worldwide granted patents

ACQUIRED VERIZON CONNECT'S INTERNATIONAL COMMERCIAL OPERATIONS,
welcoming over 400 employees in Europe and Australia

RAISED $240,000 USD (207,391.20 €)
for charitable and community-based organisations worldwide

ACADEMIC RESEARCH PARTNERSHIPS
with Georgia Institute of Technology, University of Toronto, University of Waterloo and McMaster University

Awards and recognition

Fast Company Best Workplaces for Innovators 2025

Report on Business Canada's Top Growing Companies, sixth consecutive win

Google Cloud Partner of the Year Award, Sustainability

Frost & Sullivan 2025 North American Commercial Vehicle Fleet Management Company of the Year

Artificial Intelligence Excellence Award

2025 Canada's Best Managed Companies, Platinum Club

Innovator CEO of the Year (Neil Cawse)

Prince Michael International Road Safety Award, Technologies for the Safe System

BusinessCar Awards, Best Innovation Award for Geotab Ace

2025 Great British Fleet Award, Innovation in Risk Management

ABI Research Overall leader, Top Innovator and Top Implementer badges

The fleet ecosystem

ADOPTION RATES: FLEET MANAGEMENT TECHNOLOGY

SMALL FLEETS:	70%
MID-SIZED FLEETS:	71%
ENTERPRISE FLEETS:	74%

Photo: Øresund Bridge between Malmo in Schweden and Kopenhagen, DK

The 2026 European fleet mandate: navigating the new "speed limit" economy

As we launch the Geotab Report 2026, the European commercial landscape finds itself at a critical scenario. In this sense, OECD "was cutting its eurozone growth outlook and forecasting higher inflation for 2026 after the Middle East war caused energy prices to skyrocket" stated. [1].

The latest report maintains a steady **"2.9% global growth forecast**, but warns of mounting pressure in the eurozone, where inflation expectations have jumped **0.7 points to 2.6%"** [2]

This adjustment reflects a fragile balance as the economy moves through 2026, navigating a mix of persistent price pressures and shifting trade dynamics.

Growth is currently caught in a tug-of-war between strong technological investment and significant geopolitical risks. While momentum from 2025 and high-tech production provide a "tailwind," these gains are being offset by **rising energy costs** and volatility in the Middle East. These factors threaten to dampen consumer demand and increase operational costs for businesses worldwide. [3]

For fleet-dependent organisations in Europe, this "speed limit" is felt most acutely at the fuel pump. According to the **European Commission's Weekly Oil Bulletin**, average diesel prices across the EU-27 have surged to **€1.84 per litre**, with high-cost markets like the Netherlands and Denmark exceeding **€2.20 per litre** as of March 2026. [4]

In an era where inflation was once thought to be under control, these soaring energy prices—driven largely by geopolitical volatility in the Middle East—have forced a strategic pivot. **The European Central Bank (ECB)** recently revised its 2026 inflation forecast "upward to **2.6%**" [5], noting that energy-driven cost pressures are transforming fleet management from a tactical back-office function into a mandate for corporate survival.

↑2.9% GLOBAL GROWTH FORECAST

€1.84
per litre for diesel

KEY TAKEAWAYS

The SMB vs. Enterprise impact: a European perspective

The burden of rising operational costs is felt differently across the European business spectrum, yet the strategic solution remains unified. For **small to medium businesses (SMBs)**, where margins are thin and capital reserves are limited, the 0.7-point jump in Eurozone inflation is a direct threat to viability. [6]

In this climate, GPS tracking and route optimisation have shifted from "nice-to-haves" to essential survival tools, ensuring that every litre of **€1.85 diesel** [7] is converted into billable revenue by neutralising unbillable latency.

For **Enterprise fleets**, the challenge lies in managing "inflationary creep" across massive, cross-border asset networks. At this scale, even a 1% reduction in idling or a minor improvement in fuel tax recovery translates into millions of Euros reclaimed.

For these large-scale operators, 2026 is defined by maintaining service integrity while insulating budgets from the extreme volatility of global energy markets and unpredictable geopolitical shifts.

The connected fleet as an inflation hedge

In a high-pressure economy, **Connected Fleet technology** serves as a vital relief valve by transforming raw data into a "near real-time pulse" for the business. Top-performing sectors across Europe are utilising precision telematics to:

1. **Curb fuel waste:** Monitoring idling and driver behaviour to offset rising fuel costs.

2. **Optimise labour:** Maximising workforce productivity without over-extending capacity in a "speed limit".

3. **Drive rapid ROI:** With over half of European service fleets achieving positive ROI in under 12 months, data-driven intelligence is the most effective way to cool down an "overheated" budget.


Photo: Lermooser Tunnel, Fern Pass, Tyrol, Austria

The connected fleets pulse

2026

ACTIVE SMART FLEET MANAGEMENT SOLUTIONS:

GPS TRACKING	72%
IN-CAB VIDEO (INCLUDING FRONT FACING AND DRIVER FACING CAMERAS)	53%
FIELD SERVICE MANAGEMENT (SCHEDULING, DISPATCH, COMMUNICATION)	42%
ASSET/TRAILER/EQUIPMENT TRACKING	40%

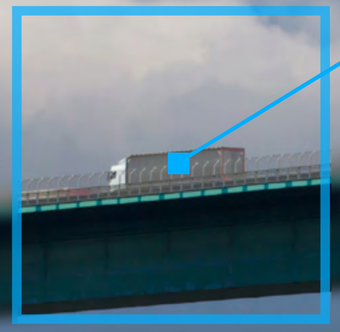


Photo: Europa Bridge, Innsbruck, Tyrol, Austria

The connected fleets in Europe: 2026's strategic mobility trends

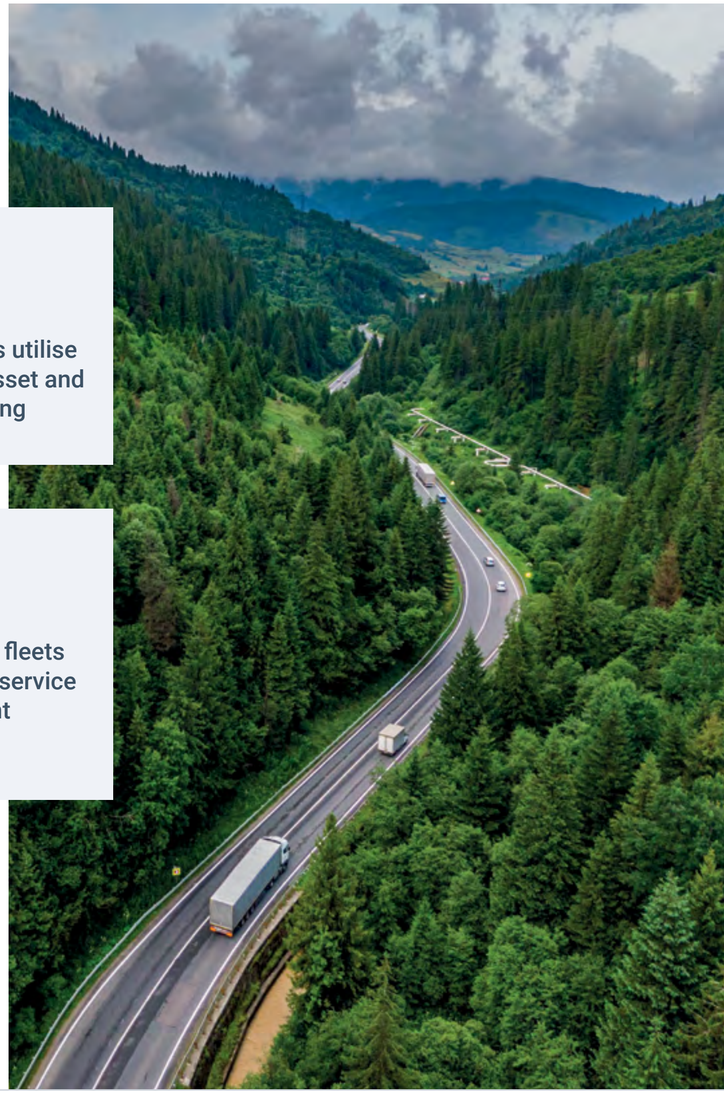
In the current European landscape, the modern fleet has transcended its traditional role to become a high-velocity, data-driven ecosystem. As we navigate 2026, GPS tracking stands as the industry's undisputed backbone, with **72%** of European fleets leveraging near real-time location intelligence to anchor their logistics. This digital oversight is no longer confined to the vehicle alone; it now encompasses the entire supply chain, as 40% of managers utilise advanced asset and trailer tracking to secure high-value equipment across international corridors.

Operational efficiency is being redefined at a granular level through the integration of human and machine data. Currently, **42%** of European fleets deploy field service management solutions to bridge the gap between back-office dispatch and the front line, ensuring seamless communication in an increasingly complex regulatory environment.

Safety has similarly undergone a digital revolution; **53%** of operators have now integrated In-cab video, utilising dual-facing cameras to protect their drivers and mitigate risk. Together, these technologies signal a definitive shift from traditional hauling to a sophisticated, tech-first approach to global mobility.

Active smart fleet management solutions by business size:

	Small (1 – 29 vehicles)	Medium (30 – 149 vehicles)	Enterprise (150 + vehicles)
GPS tracking	70%	71%	74%
Asset/trailer/equipment tracking	35%	35%	49%
In-cab video (including front facing and driver facing cameras)	47%	47%	61%
Field service management (Scheduling, dispatch, communication)	42%	42%	55%



40%

of managers utilise advanced asset and trailer tracking

42%

of European fleets deploy field service management solutions

Top 5 industries in Europe

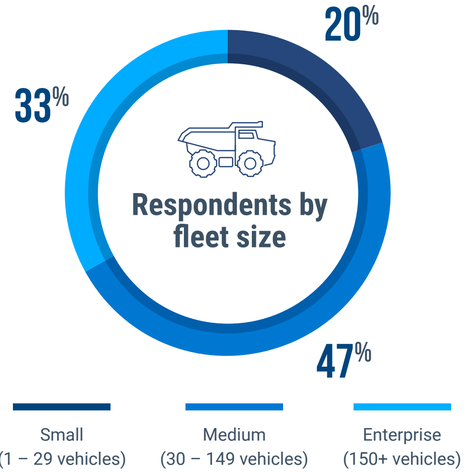
Construction

Precision in the field

In the current European construction climate, fleet intelligence has evolved from a basic security measure into the central nervous system of high-efficiency operations. As the sector faces increasing pressure to balance rapid project delivery with stringent environmental standards, firms are utilising near real-time data to eliminate the financial drain of underutilised assets.

By establishing a digital "sector pulse" on equipment location and engine diagnostics, European construction leaders are effectively neutralising the unbillable latency that previously eroded profit margins on thin-margin projects.

This granular visibility allows project managers to achieve true operational synchronisation, aligning heavy machinery arrivals with crew schedules to ensure that expensive assets aren't idling away capital while waiting for site readiness. In an industry where specialised equipment is the lifeblood of production, the ability to monitor high-utilisation metrics ensures that every gear turn contributes directly to the bottom line.



Fleet management technology currently utilised by the Construction industry:

GPS tracking	71%
In-cab video (including front facing and driver facing cameras)	47%
Asset/trailer/equipment tracking	35%
Field service management (Scheduling, dispatch, communication)	42%

Construction	Small (1 – 29 vehicles)	Medium (30 – 149 vehicles)	Enterprise (150 + vehicles)
GPS tracking	61%	70%	78%
Asset/trailer/equipment tracking	24%	36%	42%
In-cab video (including front facing and driver facing cameras)	30%	50%	54%
Field service management (Scheduling, dispatch, communication)	18%	42%	58%

KEY TAKEAWAYS

- **84%** of businesses in the construction industry who use a GPS tracking solution stated that it is "very" or extremely" beneficial to manage their fleets, and 66% explained that they have reduced their fleet costs.
- **54%** of survey respondents achieved a positive ROI in under 12 months.

In the construction industry, **35%** of businesses reduced idling by **5% to 20%**, while **41%** achieved a more significant reduction of **20% to 40%**.

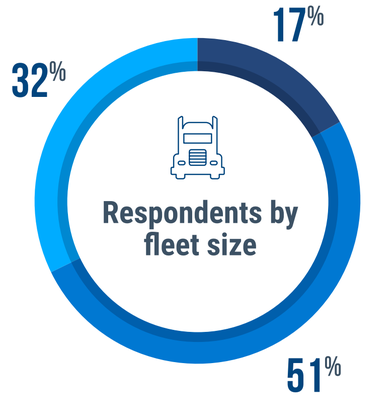
Top 5 industries in Europe

General freight

The new standard for reliability

In the current European logistics landscape, advanced telematics have transcended simple navigation to become the strategic intelligence layer required to navigate the volatility of modern cross-border corridors. By shifting from reactive troubleshooting to a model of operational excellence, European freight managers are utilising high-fidelity data on driver behaviour and fuel consumption to anchor their operations.

This proactive approach effectively minimises the risks of cargo spoilage and delivery delays, fortifying the vital trust between carriers and shippers. In an era where "just-in-time" is the baseline expectation across the EU, leveraging near real-time data allows general freight companies to transform technical oversight into a significant competitive advantage ensuring fleets remain agile, compliant, and consistently profitable amidst rising costs.



Small (1 – 29 vehicles) | Medium (30 – 149 vehicles) | Enterprise (150+ vehicles)

Fleet management technology currently utilised by the General freight industry:

GPS tracking	72%
In-cab video (including front facing and driver facing cameras)	58%
Asset/trailer/equipment tracking	43%
Field service management (Scheduling, dispatch, communication)	41%

General freight	Small (1 – 29 vehicles)	Medium (30 – 149 vehicles)	Enterprise (150 + vehicles)
GPS tracking	73%	69%	76%
Asset/trailer/equipment tracking	18%	47%	50%
In-cab video (including front facing and driver facing cameras)	31%	63%	64%
Field service management (Scheduling, dispatch, communication)	18%	38%	57%

KEY TAKEAWAYS

- **82%** of businesses in the general freight industry who use a GPS tracking solution stated that it is "very" or extremely" beneficial to manage their fleets, and 62% explained that they have reduced their fleet costs.
- **61%** of survey respondents achieved a positive ROI in under 12 months.

In the general freight sector, **28%** of businesses achieved an idling reduction of **5% to 20%**, while a significant **43%** managed to reduce idling by **20% to 40%**.

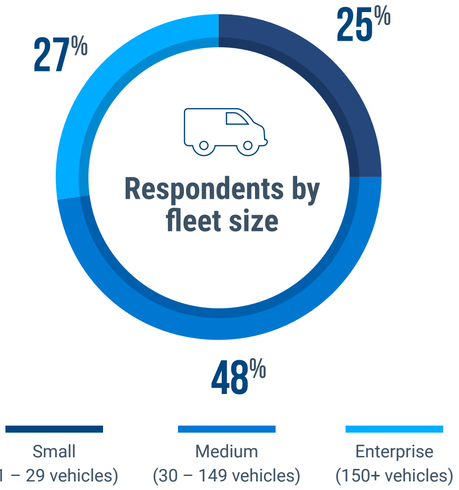
Top 5 industries in Europe

Services

Driving productivity

In the highly competitive European service landscape, the primary benefit of integrated telematics lies in its ability to transform passive location data into a high-octane engine for improved productivity. By establishing a near real-time "connected fleets pulse" across dense urban centres and sprawling regional routes, European service providers are moving beyond the guesswork of traditional scheduling. This digital transition effectively neutralises the "unbillable latency" that once plagued mobile workforces.

This visibility allows for sophisticated route optimisation, ensuring that technicians are dispatched via the most direct, congestion-aware paths. By reclaiming the billable hours previously lost to back-tracking or avoidable traffic delays, European businesses are maximising their human capital. For a local trade or field service firm, this often represents the critical difference between completing an extra service call per day or leaving significant revenue on the table due to inefficient transit.



Fleet management technology currently utilised by the Services industry:

GPS tracking	83%
In-cab video (including front facing and driver facing cameras)	48%
Asset/trailer/equipment tracking	43%
Field service management (Scheduling, dispatch, communication)	44%

Services	Small (1 – 29 vehicles)	Medium (30 – 149 vehicles)	Enterprise (150 + vehicles)
GPS tracking	81%	81%	88%
Asset/trailer/equipment tracking	24%	45%	58%
In-cab video (including front facing and driver facing cameras)	24%	54%	59%
Field service management (Scheduling, dispatch, communication)	24%	46%	58%

KEY TAKEAWAYS

- **81%** of businesses in the services industry who use a GPS tracking solution stated that it is "very" or extremely" beneficial to manage their fleets, and **65%** explained that they have reduced their fleet costs.
- In the services industry, **34%** of businesses reduced idling by **5%** to **20%**, while a significant **43%** achieved a reduction of **20%** to **40%**.
- **58%** of survey respondents achieved a positive ROI in under 12 months.

Within the services sector, **42%** of businesses reduced fuel consumption by **5–20%**, while **30%** achieved a more substantial reduction of **20–40%**.

Top 5 industries in Europe

Passenger transportation

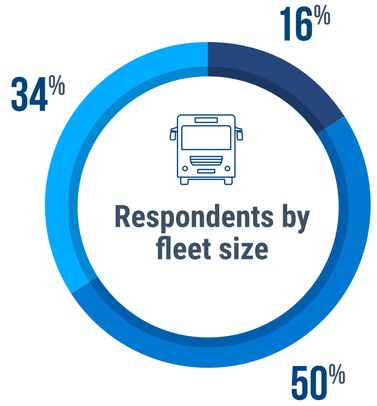
Safety excellence

In the modern landscape of high-end livery, ride-hailing, and taxi services, GPS telematics have evolved into the primary engine for elite service delivery and **safety excellence**. For Limo and Black Car operators, establishing a near real-time "connected fleet pulse" allows for the sophisticated synchronisation of arrivals with flight schedules and corporate windows, ensuring a "no-wait" experience.

This granular visibility, supported by **in-cab video (51%)**, creates a vital "visual shield" that protects both drivers and passengers while providing high-definition accountability that mirrors the premium expectations of a top-tier brand.

Beyond logistics, these technologies are driving a proactive shift in customer service and risk mitigation. By integrating **field service management (51%)** with instant driver coaching, European operators are effectively neutralising the "unbillable latency" of urban congestion while ensuring a smooth, professional ride.

The ability to provide hyper-accurate ETAs and manage driver fatigue proactively ensures that the service remains frictionless and secure. Ultimately, by turning raw telematics into a strategy of **service excellence**, passenger transport leaders are securing a definitive competitive edge and superior customer satisfaction scores.



Small (1 – 29 vehicles) | Medium (30 – 149 vehicles) | Enterprise (150+ vehicles)

Fleet management technology currently utilised by the passenger transportation sector:

GPS tracking	77%
In-cab video (including front facing and driver facing cameras)	51%
Field service management (Scheduling, dispatch, communication)	51%
Asset/trailer/equipment tracking	39%

Passenger transportation	Small (1 – 29 vehicles)	Medium (30 – 149 vehicles)	Enterprise (150 + vehicles)
GPS tracking	71%	79%	76%
Asset/trailer/equipment tracking	29%	34%	52%
In-cab video (including front facing and driver facing cameras)	29%	48%	65%
Field service management (Scheduling, dispatch, communication)	19%	51%	65%

KEY TAKEAWAYS

- **78%** of businesses in the passenger transportation industry who use a GPS tracking solution stated that it is "very" or extremely" beneficial to manage their fleets, and **65%** highlighted that they have reduced their fleet costs.
- In the passenger transportation industry, **31%** of businesses reduced idling by **5–20%,** while a significant **40%** achieved a reduction of **20–40%**
- **61%** of survey respondents achieved a positive ROI in under 12 months.
- Within the passenger transportation sector, **55% of businesses** reduced fuel consumption by **5–20%,** while a further **20%** achieved a more significant reduction of **20–40%.**

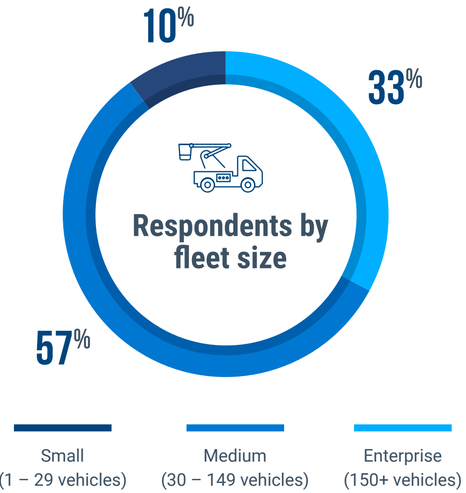
Top 5 industries in Europe

Government

Civic efficiency

For the Government, the integration of GPS fleet management represents a transformative shift toward a more transparent and fiscally responsible public sector. By establishing a near real-time "connected fleet pulse" across massive inter-state and local government fleets, agencies can move beyond traditional logistical silos to a model of unified operational awareness.

This visibility allows for sophisticated route optimisation that ensures essential services from emergency response to road maintenance are delivered via the most direct and fuel-efficient paths. In an era where taxpayers demand maximum value, the ability to improve productivity through data-driven dispatching ensures that public assets are moving with purpose, reducing the carbon footprint of the national fleet while maintaining the highest service-level standards for the community.



Fleet management technology currently utilised by the Government:

GPS tracking	79%
Asset/trailer/equipment tracking	38%
In-cab video (including front facing and driver facing cameras)	57%
Field service management (Scheduling, dispatch, communication)	41%

Government Sector	Small (1 – 29 vehicles)	Medium (30 – 149 vehicles)	Enterprise (150 + vehicles)
GPS tracking	78%	80%	71%
Asset/trailer/equipment tracking	24%	44%	50%
In-cab video (including front facing and driver facing cameras)	39%	63%	86%
Field service management (Scheduling, dispatch, communication)	13%	57%	43%

KEY TAKEAWAYS

- **78%** of businesses in the government who use a GPS tracking solution stated that it is "very" or extremely" beneficial to manage their fleets, and **76%** explained that they have reduced their fleet costs.
- **30%** of businesses in the government sector reduced idling by **5–20%**, while a significant **49%** achieved a reduction of **20–40%**.
- **46%** of survey respondents achieved a positive ROI in under 12 months.
- **27%** of organisations in the sector also reduced fuel consumption by **5–20%**, while a significant **47%** achieved a reduction of **20–40%**.

Key Insights: the 2026 European connected fleet pulse

GPS Fleet Tracking: the operational backbone

- **Mission criticality: 78% of government and passenger transportation** providers categorised GPS tracking as "very" or "extremely" beneficial for managing complex public infrastructure.
- **Fiscal accountability: 68% of government agencies** reported a definitive reduction in total fleet costs, while **46%** realised a positive ROI in under 12 months, ensuring high-velocity taxpayer value.
- **The productivity surge: 71% of construction firms** and **69% of general freight** carriers achieved a significant boost in productivity through optimised vehicle utilisation and load completion.
- **Service precision: 57% of passenger transportation** fleets utilised the "connected fleet pulse" to improve customer service standards, neutralising the impact of urban congestion.

Video Telematics: the visual shield

- **The fatigue defense: 42% of general freight and services** enterprises utilised video to reduce driver fatigue by up to **60%**, moving from reactive investigation to proactive risk coaching.
- **Liability protection: 73% of general freight** carriers successfully reduced false insurance claims through high-definition evidence, shielding the bottom line from inaccurate liability.
- **Safety sovereignty: 73% of all European industries** reported a measurable improvement in overall driver safety, **29% of businesses in the services industry decreased** insurance costs.
- **Rapid capital recovery: 62% of government and 55% of services businesses** achieved a positive ROI in under a year, driven by lower incident costs and exoneration from false claims.

Asset & Equipment tracking: capital optimisation

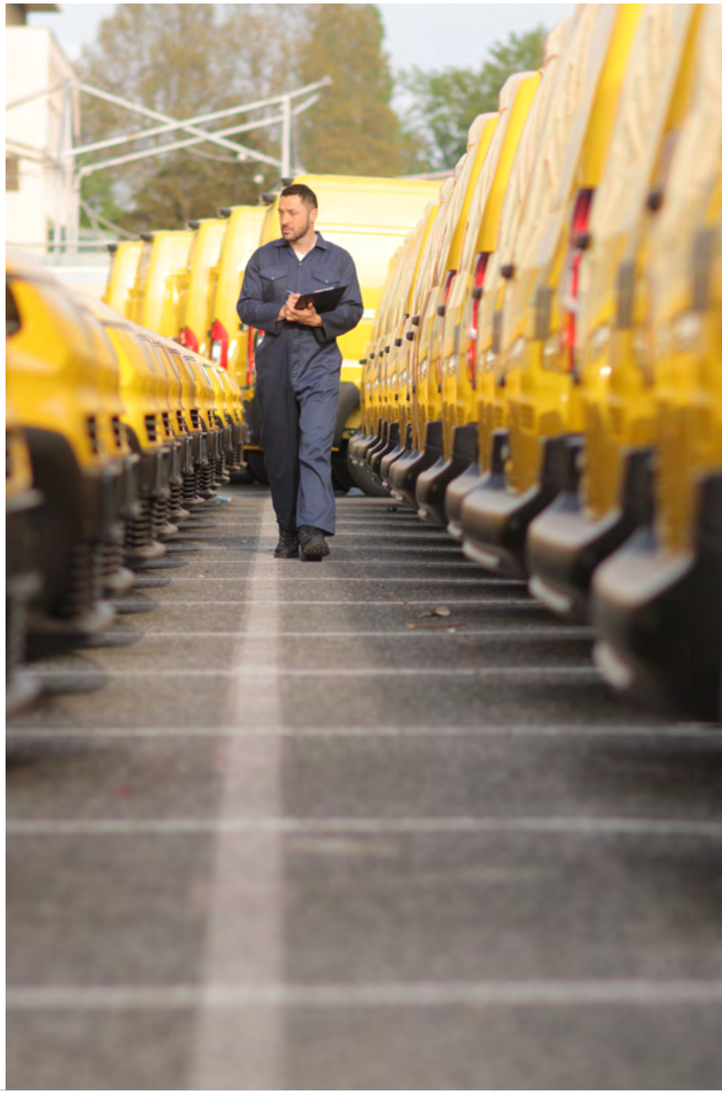
- **Operational value: 79% of European construction** businesses stated that asset tracking is "very" or "extremely" beneficial for high-value machinery management.
- **Asset yield: 66% of construction businesses** improved their asset and trailer utilisation, effectively turning dormant site machinery into active revenue.
- **Site integrity: 42% of construction companies** reported improved site safety, directly linked to better equipment oversight and reduced "unauthorised" use.
- **Theft suppression: 37% of businesses** across all industries successfully reduced theft incidents and improved insurance claims for lost assets, securing their bottom line against site disruptions.

AI-powered route optimisation: the efficiency engine

- **Last-mile velocity: 69% of enterprise fleets** achieved a significant reduction in last-mile delivery times, while 75% improved their on-time delivery rates.
- **Service excellence: 64% of small and enterprise operators** reported a direct improvement in customer experience scores through hyper-accurate ETAs.
- **Environmental leadership: 64% of large-scale operators** utilised AI routing to meet their 2026 CO_2 reduction goals through mileage optimisation.
- **Margin protection: 55% of mid-sized businesses** successfully reduced their fuel costs by neutralising unbillable latency in transit.

EV & hybrid management: the future pulse

- **Operational command: 75% of EV operators** improved their fleet visibility, effectively integrating electric assets into daily high-density dispatch.
- **Energy architecture: 43% of organisations** successfully achieved better battery status visibility, while 63% improved their daily operations management through integrated EV data.
- **Cost efficiency: 56% of businesses** reduced their operational costs by combining GPS tracking with electric vehicle technology.
- **Carbon neutrality: 34% of fleets** achieved a direct reduction in CO_2 emissions, accelerating their path toward the EU's 2030 net-zero targets.



Key Insights: the 2026 connected fleets pulse

European fleets conquer complexity in 2026

In the 2026 European landscape, GPS fleet tracking has transitioned from a monitoring tool to a fundamental growth engine. The data reveals a clear trend: as fleets scale, the "connected fleet pulse" of telematics becomes the primary defense against operational friction. Across all business sizes, organisations are using near real-time insights to transform raw data into a strategy of fiscal accountability and workforce safety.

Small businesses fleet spotlight:

(1– 29 Vehicles):

The agility multiplier

For the agile small business, GPS tracking is the ultimate "multiplier," allowing lean teams to punch well above their weight. In Europe, **72%** of small businesses categorise this technology as "very" or "extremely" beneficial.

- **The compliance shield:** topping the list of achievements is regulatory compliance **(65%)**, proving that digital tools are essential for small firms to navigate the EU's complex legal landscape.
- **Productivity & fiscal Impact: 63%** of small operators achieved higher vehicle utilisation, while **57%** successfully reduced total fleet costs.
- **Rapid capital recovery:** the transition is high-velocity, with **55%** achieving a positive ROI in under **12** months.
- **Asset security:** a high **56%** recovery rate for stolen vehicles provides a vital safety net for small-scale capital investments.
- **Safety bonus: 39%** of small businesses successfully improved driver safety habits, while **26%** saw a direct increase in seat belt usage.

Mid-sized fleet spotlight:

(30 – 149 Vehicles):

Precision scaling

As businesses scale, the "connected pulse" becomes the primary defense against scaling friction. **77%** of mid-sized firms in Europe validate the strategic necessity of these solutions to maintain control over expanding operations.

- **Operational momentum:** the top goals achieved were improved productivity **(67%)** and regulatory compliance **(66%)**, ensuring that growth does not compromise efficiency.
- **Fuel & customer excellence: 57%** saw a definitive decrease in fuel consumption, while **52%** significantly elevated their customer service standards through better transparency.
- **The bottom line: 63%** of managers successfully reduced fleet costs, and **52%** realised a full return on investment within the first year.
- **Safety bonus:** mid-market leaders are doubling down on safety, with **40%** improving driver habits and **33%** increasing seat belt compliance across the fleet.

Enterprise fleet spotlight:

(150+ Vehicles):

Strategic sovereignty

At the enterprise level, advanced fleet management is a high-stakes exercise in risk mitigation and margin protection. **78%** of enterprise leaders rely on this data for sovereign control over their sprawling, multi-national operations.

- **Peak productivity:** large-scale fleets reported the highest gains in the study, with **69%** improving overall productivity and vehicle yield.
- **Strategic cost suppression:** enterprises achieved the most significant "win" in the market, with **69%** successfully reducing total fleet costs—a critical result given the massive overhead of large fleets.
- **Efficiency leaders: 61%** achieved a reduction in fuel consumption and **61%** improved customer service, proving that massive scale can coexist with hyper-responsiveness.
- **High-velocity ROI:** even with massive infrastructure, **56%** of these large-scale operations achieved a positive ROI in under **12** months.
- **Safety bonus: 41%** of enterprise fleets improved driver safety habits, with **31%** increasing seat belt usage across their massive driver cohorts.

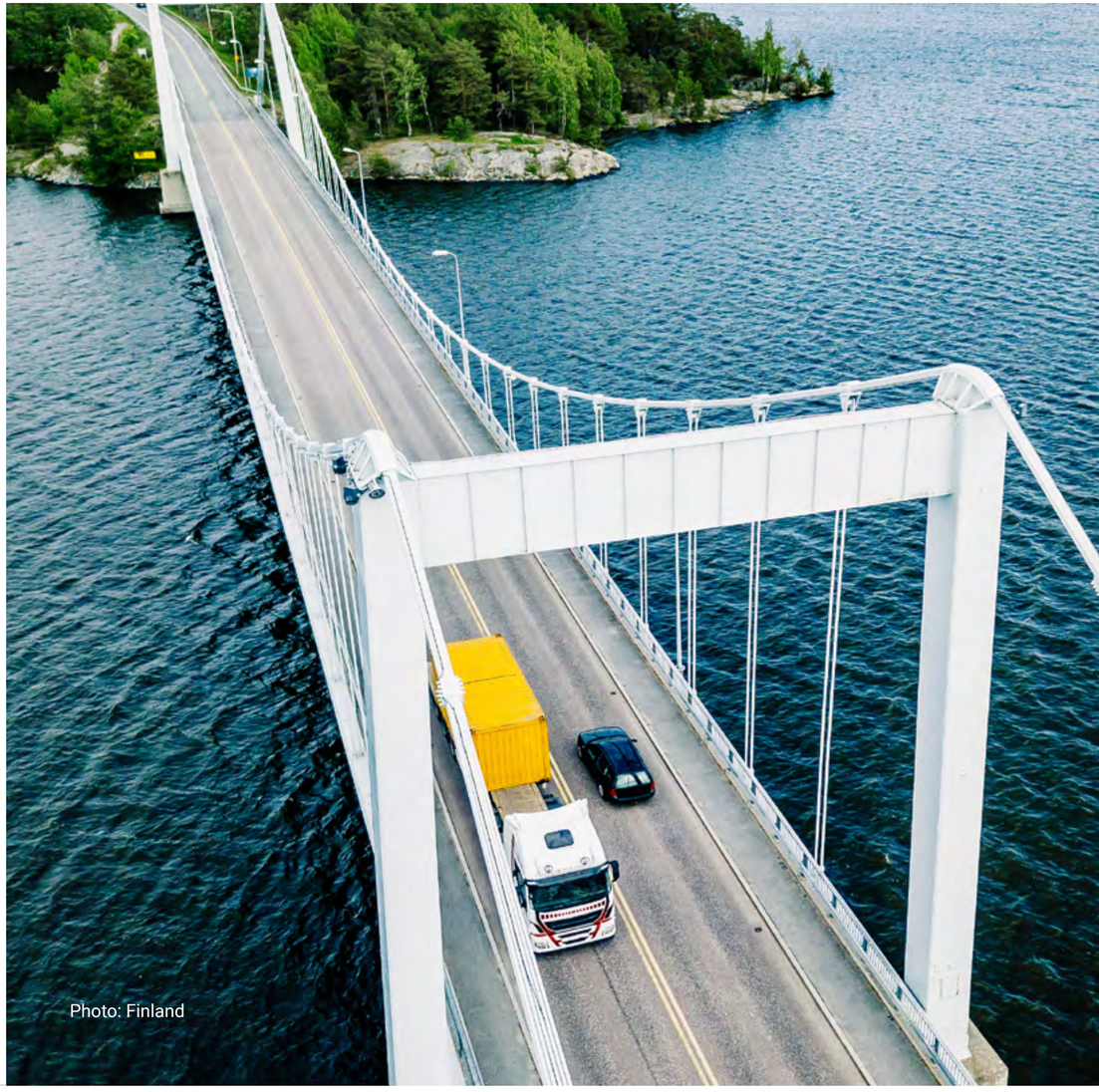


Photo: Finland

Key Insights: the 2026 connected fleets pulse

AI-powered route optimisation & last mile

The last-mile velocity shift

In the high-density urban corridors of Europe, AI-driven routing has moved from a luxury to a logistical necessity.

- **Compression of delivery windows: 69% of enterprise fleets** in Europe reported a direct reduction in last-mile delivery times. This shift allows large-scale operators to maximise vehicle turnover within increasingly strict city-centre access windows.
- **Precision reliability:** the impact on punctuality is profound across the board; **75% of large enterprises and 74% of small businesses** have successfully improved on-time delivery rates, effectively neutralising the unpredictability of European traffic congestion.
- **Service excellence:** for **64% of small and enterprise operators**, AI is the primary engine for superior customer experience, providing the hyper-accurate ETAs and transparency that modern consumers demand.

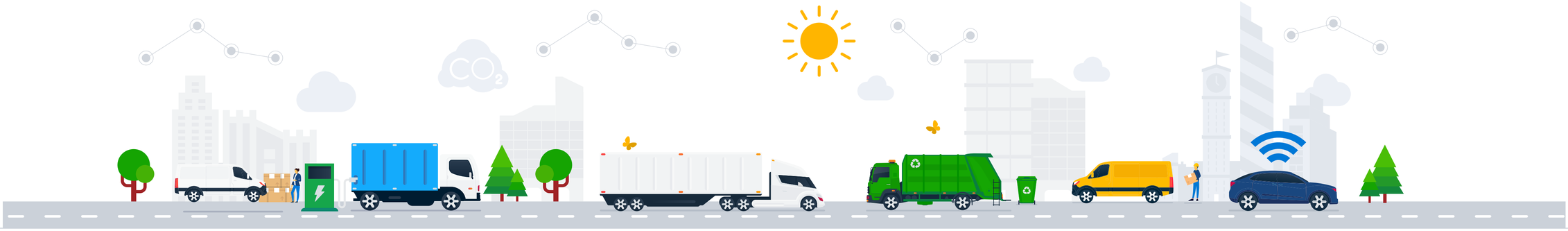
The fiscal & environmental impact of AI

Efficiency in 2026 is measured by both the balance sheet and the carbon footprint.

- **Fuel resilience:** mid-sized European firms are leading the way in cost suppression, with achieving significant fuel savings. Across all fleet sizes, over half of the market is using AI to ensure every kilometre driven is the most cost-effective path possible.
- **The green corridor:** in a regulatory environment focused on decarbonisation, **64% of small and enterprise fleet**s utilised AI routing to measurably reduce their CO_2 emissions, turning routing logic into a core pillar of their ESG strategy.
- **Scaling without headcount:** for small businesses, the **64% success rate** in reducing delivery times means more "calls per day" and higher job density without the need to increase fixed vehicle or driver overheads.

The future of delivery intelligence

- **The "wait and see" strategy:** while adoption is high, a strategic segment of the market, **23% of small businesses and 25% of medium fleets**, are currently awaiting further AI refinements before fully transitioning away from static scheduling.
- **Anticipating the leap:** across all categories, an average of **18% of enterprises** expect imminent improvements in delivery time and punctuality, suggesting a secondary wave of AI integration is expected as machine learning models become even more localised to European city layouts.



Protect team's safety and service integrity to enhance competitive advantage in the European market

In a fluctuating economy, the integrity of your operation is your strongest defense against uncertainty. For the growing enterprise, protecting your workforce and fulfilling client commitments is no longer just a daily task, it is a strategic mandate.

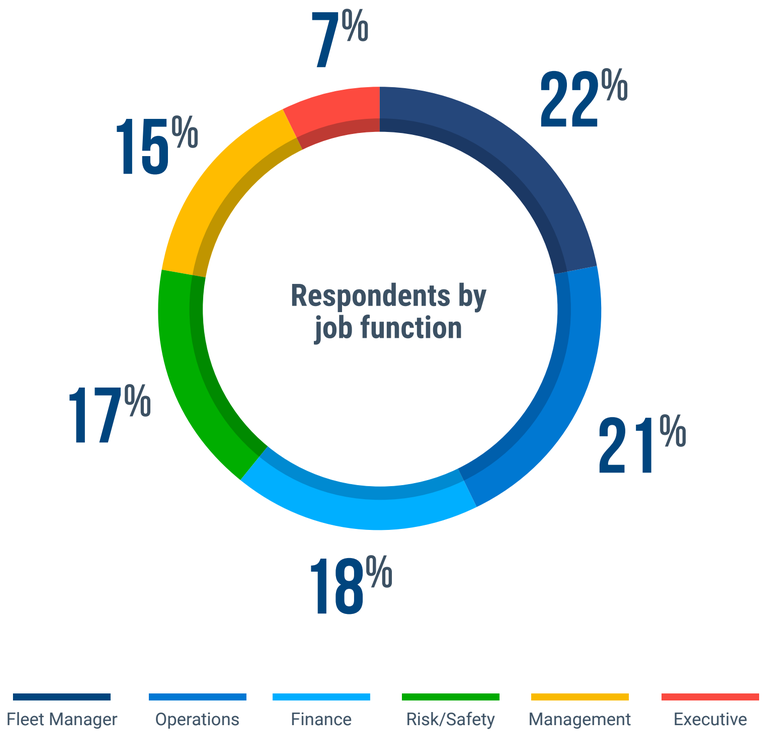
Maintaining high safety standards and service integrity ensures that even when the market is volatile, your reputation remains a constant. By replacing informal oversight with rigorous, data-backed safety and compliance protocols, you insulate your business from the compounding costs of incidents and litigation. This level of professional stability is what separates established market leaders from those struggling to keep pace.

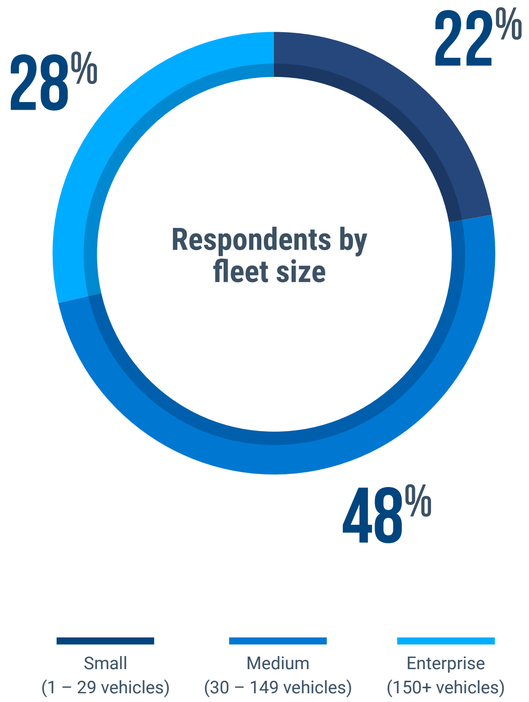
KEY TAKEAWAYS

Businesses take the lead:

- **67%** set up safety measures for employees and vehicles
- **65%** re-negotiate or extend fleet leases
- **62%** enhance route or operational efficiency improvements
- **58%** focus on compliance and regulatory preparedness
- **56%** working on maintenance management improvements
- **50%** boost fuel-saving initiatives
- **40%** monitor workforce and vehicle utilisation
- **40%** adopt or expands of fleet management technology
- **28%** maintain current initiatives

Who responded to the survey?





Respondents by industry

- 18% Construction
- 16% General freight
- 15% Passenger transportation
- 14% Services
- 8% Government
- 6% Manufacturing
- 6% Retail/wholesale
- 5% Transport of petroleum
- 4% Food production or distribution
- 3% Utilities
- 3% Metro delivery & last mile delivery
- 2% Refuse or recycling

Performance metrics & ROI

2026

TANGIBLE RESULTS

76% OF EUROPEAN BUSINESSES WHO USE A GPS TRACKING SOLUTION STATED THAT IT IS "VERY" OR EXTREMELY" BENEFICIAL TO MANAGE THEIR FLEETS

64% EXPLAINED THAT THEY HAVE REDUCED THEIR FLEET COSTS

54% OF BUSINESSES ACHIEVED A POSITIVE ROI UNDER 12 MONTHS

67% OF BUSINESSES IMPROVED PRODUCTIVITY

The speed of ROI in Europe's connected fleets

In the 2026 European industrial landscape, the transition to advanced fleet management has shifted from a long-term infrastructure play to a high-velocity engine for capital recovery.

As businesses grapple with volatile energy costs and tightening margins, the ability to realise a positive return on investment (ROI) within a single fiscal cycle has become the benchmark for operational success. The latest data reveals a profound trend across the continent: for a clear majority of sectors, digital coordination is no longer a "slow-burn" investment but a rapid intervention that self-funds within twelve months of implementation.

Leading this surge of fiscal efficiency are the general freight and passenger transportation sectors, where a remarkable **61%** of organisations achieved a positive ROI in under a year.

This rapid turnaround is mirrored in the services **(58%)** and construction **(55%)** industries, suggesting that where operational density and fuel consumption are highest, the "connected fleet pulse" of telematics delivers its most immediate impact. By neutralising unbillable latency and optimising asset utilisation, European leaders are proving that the path to profitability is increasingly paved with near real-time data.

Timeframe to achieve a positive ROI after implementing an advanced fleet management solution in Europe

Timeframe to achieve positive ROI 2026	Under 12 months	1 year to < 3 years	3 years to 5 years	Have not realised positive ROI yet	Don't know/ Not sure
Construction	55%	36%	7%	2%	–
General freight	61%	25%	11%	3%	–
Passenger transportation	61%	27%	7%	4%	2%
Services	58%	32%	7%	3%	–
Government	46%	41%	8%	5%	–
Manufacturing	41%	33%	21%	5%	–
Retail/wholesale	45%	26%	25%	4%	–
Transport of petroleum	41%	32%	18%	9%	–
Food production or distribution	45%	31%	18%	6%	–
Utilities	48%	31%	21%	–	–
Metro delivery & last mile delivery	52%	41%	7%	–	–
Refuse or recycling	24%	47%	24%	5%	–

The benefits of GPS fleet tracking and vehicle telematics solutions that drives tangible results for your business

In the 2026 European industrial landscape, GPS fleet tracking has emerged as the definitive catalyst for operational transformation, bridging the gap between local SMBs and global enterprises. Leading this surge is a **57% increase in overall productivity** through higher vehicle utilisation, supported by a **54% strengthening of regulatory compliance**.

These figures highlight a critical shift where digital oversight is no longer just a monitoring tool, but a core driver of market responsiveness and fiscal accountability, with **47% of organisations** achieving superior customer service outcomes as a direct result of real-time transparency.

The data further reveals a powerful impact on the bottom line, with **44% of businesses** recording a measurable decrease in fuel consumption and a **43% improvement in routing efficiency**. By turning raw telematics into a strategy of preventative health, European leaders are protecting high-value assets and ensuring workforce safety in an increasingly volatile market.

Now, we dive into small, medium and enterprise businesses:

↑57%

increase in overall productivity through higher vehicle utilisation

↓44%

of businesses recording a measurable decrease in fuel consumption

Top goals achieved by small businesses (1– 29 vehicles) after implementing GPS fleet tracking

Strategic objective	Percentage of businesses that achieved this goal
Regulatory compliance	65%
Improved productivity (for example, number of jobs, vehicle utilisation)	63%
Increase recovery rate of stolen vehicles	56%
Decrease in fuel consumption	55%
Improved sustainability (businesses committed to sustainable goals, such as reducing their environmental footprints, CO_2 emissions)	51%
Improved routing	49%
Improved customer service	48%
Improved efficiency (efficiency understood as you can achieve your results by putting the resources you have in the best way possible)	43%
Improve driver safety habits	39%
Decreased unauthorised use of vehicles	39%
Improved managing daily operations (Improved the day-to-day operations)	35%
Decrease in instances like speeding and harsh driving to reduce incidents	29%
Increase seat belt usage	26%
CO_2 reduction	26%
Decreased idling	22%
Improved vehicle maintenance	19%
Decrease in labour costs	16%

SMALL-SIZED FLEET SPOTLIGHT:

72% of European businesses who use a GPS tracking solution stated that it is "very" or extremely" beneficial to manage their fleets,

57% have reduced their fleet costs.

55% of small businesses achieved a positive ROI in under 12 months.

63% of businesses improved productivity

For the agile small business, GPS tracking is the ultimate "multiplier," allowing lean teams to punch well above their weight. In Europe, **72%** of small businesses categorise this technology as "very" or "extremely" beneficial.

- **Top goal achieved:** regulatory compliance (65%) and improved productivity (63%).
- **Fiscal impact:** 57% reduced their overall fleet costs, with 55% achieving a positive ROI in under 12 months.
- **Asset security:** a high 56% recovery rate for stolen vehicles provides a vital safety net for small-scale capital investments.

Safety bonus:

↑26%

of survey respondents increased seat belt usage

↑39%

of small businesses improved driver safety habits

Top goals achieved by medium businesses (30 – 149 vehicles) after implementing GPS fleet tracking

Strategic objective	Percentage of businesses that achieved this goal
Improved productivity (for example, number of jobs, vehicle utilisation)	67%
Regulatory compliance	66%
Increase recovery rate of stolen vehicles	61%
Decrease in fuel consumption	57%
Improved customer service	52%
Improved routing	46%
Improved sustainability (businesses committed to sustainable goals, such as reducing their environmental footprints, CO_2 emissions)	46%
Improved efficiency (efficiency understood as you can achieve your results by putting the resources you have in the best way possible)	42%
Improve driver safety habits	40%
Decreased unauthorised use of vehicles	34%
Decrease in instances like speeding and harsh driving to reduce incidents	33%
Increase seat belt usage	33%
Decreased idling	23%
Improved managing daily operations (Improved the day-to-day operations)	26%
Improved vehicle maintenance	26%
CO_2 reduction	23%
Decrease in labour costs	17%

MID-SIZED FLEET FACTS SPOTLIGHT:

77% of European businesses who use a GPS tracking solution stated that it is "very" or extremely" beneficial to manage their fleets

63% have reduced their fleet costs.

52% of mid-sized businesses achieved a positive ROI under 12 months

67% of businesses improved productivity

As businesses scale, the "connected fleet pulse" becomes the primary defense against scaling friction. 77% of mid-sized firms validate the strategic necessity of these solutions.

- **Top goal achieved:** improved productivity (67%) and regulatory compliance (66%).
- **Operational wins:** 57% saw a decrease in fuel consumption, while 52% significantly improved their customer service standards.
- **Capital recovery:** 63% of managers successfully reduced fleet costs, and 52% realised a full ROI within the first year.

Safety bonus:

↑40%

of small businesses improved driver safety habits

↑33%

of respondents reported increased seat belt compliance

Top goals achieved by medium businesses (150+ vehicles) after implementing advanced fleet management

Strategic objective	Percentage of businesses that achieved this goal
Improved productivity (for example, number of jobs, vehicle utilisation)	69%
Decrease in fuel consumption	61%
Improved customer service	61%
Increase recovery rate of stolen vehicles	61%
Regulatory compliance	55%
Improved sustainability (businesses committed to sustainable goals, such as reducing their environmental footprints, CO_2 emissions)	50%
Improved efficiency (efficiency understood as you can achieve your results by putting the resources you have in the best way possible)	49%
Improved routing	47%
Improve driver safety habits	41%
Decreased unauthorised use of vehicles	39%
Decrease in instances like speeding and harsh driving to reduce incidents	36%
Increase seat belt usage	31%
Decreased idling	22%
Improved managing daily operations (Improved the day-to-day operations)	23%
CO_2 reduction	30%
Improved vehicle maintenance	24%
Decrease in labour costs	20%
Decrease in instances like speeding and harsh driving to reduce incidents	20%

ENTERPRISE FLEET SPOTLIGHT:

78% of businesses who use a GPS tracking solution stated that it is "very" or extremely" beneficial to manage their fleets

69% have reduced their fleet costs

56% of enterprise businesses achieved a positive ROI under 12 months

69% of businesses improved productivity

At the enterprise level, advanced fleet management is a high-stakes exercise in risk mitigation and margin protection. 78% of enterprise leaders rely on this data for sovereign control over their sprawling operations.

- **Top goal achieved:** improved productivity (69%), marking the highest gain across all fleet sizes.
- **Efficiency leaders:** 61% achieved a reduction in fuel consumption and 61% improved customer service, proving that scale does not have to come at the cost of responsiveness.
- **Strategic advantage:** 69% of enterprises successfully reduced fleet costs—the most significant cost-suppression rate in the market.
- **Capital recovery:** 56% of these large-scale operations achieved a positive ROI in under 12 months.

Safety bonus:

↑31%

increasing seat belt usage across their massive driver cohorts

↑41%

of businesses improved driver safety habits

Construction industry

Construction businesses driving productivity and compliance

In the demanding European construction landscape of 2026, GPS telematics have become the definitive engine for operational growth, with **71%** of firms reporting a significant boost in productivity through optimised vehicle utilisation and job completion rates. The impact is corroborated by the professionals on the ground: **84%** of construction businesses categorise these solutions as "very" or "extremely" beneficial for navigating the complexities of modern site management.

By establishing a near real-time "connected fleet pulse" across active projects, managers are effectively neutralising the "ghost hours" of idle machinery, resulting in a **68%** reduction in fuel consumption and a **47%** improvement in overall efficiency.

This digital oversight also serves as a critical shield for the bottom line; **58%** of businesses now leverage these insights to master complex regulatory compliance, ensuring that large-scale infrastructure projects remain both legally sound and fiscally disciplined.

The financial transition is remarkably high-velocity for the sector, with **54%** of European construction firms achieving a positive ROI in under twelve months. By driving down fleet costs by **66%** and increasing the stolen vehicle recovery rate to **66%**, telematics has moved from a simple tracking tool to a comprehensive strategy for asset protection and capital recovery.

2026 construction sector: strategic goals achieved

European construction leaders are using the "Connected fleet pulse" to balance high-output delivery with stringent safety and environmental standards:

Strategic objective	Percentage of businesses that achieved this goal
Improved productivity (for example, number of jobs, vehicle utilization)	**71%**
Decrease in fuel consumption	**68%**
Increase recovery rate of stolen vehicles	**66%**
Regulatory compliance	**58%**
Improved customer service	**56%**
Improved routing	**51%**
Improved sustainability (businesses committed to sustainable goals, such as reducing their environmental footprints, CO_2 emissions)	**49%**
Improved efficiency (efficiency understood as you can achieve your results by putting the resources you have in the best way possible)	**47%**
Improved driver safety habits	**43%**
Increased seat belt usage	**32%**
Decrease in instances like speeding and harsh driving to reduce incidents	**31%**
Decreased unauthorised use of vehicles	**31%**
Decreased idling	**28%**
CO_2 reduction	**27%**
Improved managing daily operations (Improved the day-to-day operations)	**25%**
Improved vehicle maintenance	**20%**
Decrease in labour costs	**19%**

The construction sector: powering performance through telematics

For construction firms, the transition to data-driven fleet management has moved from an operational choice to a competitive necessity. Among organisations utilising GPS tracking solutions, the impact is both immediate and measurable:

- **Strategic value: 84%** of construction leaders consider the technology "very" or "extremely" beneficial to their overall fleet management.
- **Operational efficiency: 71%** reported a direct boost in productivity, while **68%** successfully lowered fuel consumption.
- **Cost control: 66%** achieved significant reductions in total fleet costs, with **54%** realising a positive ROI in under **12** months.
- **Regulatory peace of mind: 58%** improved their compliance standing, streamlining documentation and safety standards.

KEY TAKEAWAYS:

Safety & operational mastery: the construction bonus

Beyond the heavy machinery, European construction managers are utilising the "pulse" to protect their human capital and streamline day-to-day site logistics:

- **Safety habit reform: 43%** of respondents successfully improved driver safety habits through data-led coaching.
- **Risk mitigation: 31%** of businesses achieved a measurable decrease in speeding and harsh driving, critical for navigating tight site access and urban zones.
- **Seat belt compliance: 32%** of survey respondents increased seat belt usage across their vehicle and equipment operators.
- **Asset integrity: 31%** of businesses decreased in unauthorised vehicle use ensures that high-value machinery stays on-task and on-site.
- **Fiscal optimisation: 19%** of firms saw a direct decrease in labour costs, while **25%** significantly improved their day-to-day operational management.

General freight industry in Europe

General freight businesses improved productivity, compliance and decreased fuel consumption

In the highly competitive European freight landscape of 2026, GPS telematics have become the primary engine for improving productivity, with **69% of organisations** reporting significant gains in vehicle utilisation and load completion.

By establishing a near real-time "sector pulse" across international and metropolitan corridors, carriers are effectively neutralising unbillable latency. This digital command has resulted in a **59% reduction in fuel consumption** and a **45% improvement in routing efficiency**, transforming thin-margin hauling into a high-performance logistics model.

This granular oversight allows for a more sophisticated deployment of resources, where **49% of businesses** have successfully elevated their customer service standards. By synchronising arrivals with live warehouse demand and cross-border requirements, European freight leaders are transforming their fleets into highly responsive units that consistently outperform traditional, static scheduling.

Furthermore, with **65% of businesses achieving regulatory compliance**, telematics has moved from an elective tool to a fundamental requirement for maintaining the "license to operate" in a complex legislative environment.

The fiscal impact of this transition is remarkably rapid, with **61% of the general freight industry** achieving a positive ROI in **under twelve months**. This efficiency is bolstered by a **64% increase in the recovery rate of stolen vehicles**, ensuring that high-value assets and cargo remain protected. By leveraging data to drive **improved sustainability (50%)** and **reduced fleet costs (62%)**, European freight enterprises are securing a definitive competitive edge in a volatile global market.

2026 general freight: strategic goals achieved

The latest data highlights how European carriers are using the "Connected fleet pulse" to balance volume with operational precision:

Strategic objective	Percentage of businesses that achieved this goal
Improved productivity (for example, number of jobs, vehicle utilization)	**69%**
Regulatory compliance	**65%**
Increased recovery rate of stolen vehicles	**64%**
Decrease in fuel consumption	**59%**
Improved sustainability (businesses committed to sustainable goals, such as reducing their environmental footprints, CO_2 emissions)	**50%**
Improved customer service	**49%**
Improved efficiency (efficiency understood as you can achieve your results by putting the resources you have in the best way possible)	**49%**
Improved routing	**45%**
Improve driver safety habits	**42%**
Decreased unauthorised use of vehicles	**41%**
Decrease in instances like speeding and harsh driving to reduce incidents	**30%**
Improved managing daily operations (Improved the day-to-day operations)	**25%**
Increased seat belt usage	**24%**
Improved vehicle maintenance	**24%**
CO_2 reduction	**21%**
Decreased idling	**19%**
Decrease in labour costs	**13%**

General freight: maximising every mile

The integration of connected technology has transformed general freight operations from reactive to proactive, delivering measurable gains across the board:

- **High-impact utility: 82%** of freight operators categorise their tracking solution as "very" or "extremely" beneficial to their day-to-day management.
- **Cost & resource control: 62%** have successfully reduced total fleet costs, while 59% have specifically cut fuel consumption through better route and behaviour monitoring.
- **Operational velocity: 69%** of businesses reported a marked improvement in overall productivity, with **25%** noting a direct uplift in the fluidity of their daily operations.
- **Rapid financial recovery:** The speed of implementation is matched by the speed of return, with **61%** of freight fleets achieving a positive ROI in under **12** months.

KEY TAKEAWAYS:

Safety & operational mastery: the freight bonus

In an industry where long-haul fatigue and road safety are paramount, European freight managers are utilising telematics to protect their human capital:

- **Safety habit reform: 42%** of respondents successfully improved driver safety habits through data-led coaching and real-time feedback.
- **Risk mitigation: 30%** of businesses achieved a measurable decrease in speeding and harsh driving, directly reducing the cost of incidents.
- **Unauthorised use: 41%** decrease in the unauthorised use of vehicles ensures that assets remain dedicated to profitable, planned routes.
- **Seat belt compliance: 24%** of survey respondents increased seat belt usage across their driver cohorts.
- **Daily management: 25%** of firms used the technology to streamline day-to-day operations, while **24%** saw a direct improvement in vehicle maintenance schedules.

Services industry in Europe

Services businesses decrease fuel consumption, improve compliance and customer service

In the competitive European service landscape, GPS telematics have emerged as a definitive catalyst for growth, with **81% of businesses** categorising these solutions as "very" or "extremely" beneficial. This technical oversight has allowed **68% of organisations** to significantly improve productivity by maximising vehicle utilisation and job volume.

By shifting from reactive scheduling to a data-driven "connected fleet pulse," service providers are successfully transforming their mobile workforce into a high-performance asset.

The financial impact of this digital transition is both profound and immediate. Service enterprises are effectively neutralising unbillable latency, resulting in a **65% reduction in overall fleet costs** and a remarkable **60% decrease in fuel consumption**. This level of fiscal control is proving to be a high-yield investment, with **58% of businesses** achieving a positive ROI in **under twelve months**. In an era where margins are tight, European service leaders are using telematics to reclaim capital and reinvest it back into scaling their field operations.

Beyond the balance sheet, the "services pulse" is redefining the customer experience. With a **53% improvement in customer service** and a **62% success rate in regulatory compliance**, businesses are not just doing more work—they are doing it more reliably. By leveraging **improved routing (46%)** and **increased stolen vehicle recovery (61%)**, the services sector is proving that digital coordination is the primary engine for both operational security and market-leading service delivery.

2026 services sector: strategic goals achieved

The data highlights a sector-wide commitment to balancing high-output productivity with environmental and safety standards:

Strategic objective	Percentage of businesses that achieved this goal
Decrease in fuel consumption	**60%**
Regulatory compliance	**62%**
Improved customer service	**53%**
Increased recovery rate of stolen vehicles	**61%**
Decreased idling	**20%**
Improved managing daily operations (improved the day-to-day operations)	**29%**
Improved efficiency (efficiency understood as you can achieve your results by putting the resources you have in the best way possible)	**42%**
Improved driver safety habits	**39%**
Improved productivity (for example, number of jobs, vehicle utilisation)	**68%**
Decrease in instances like speeding and harsh driving to reduce incidents	**36%**
Improved vehicle maintenance	**23%**
Decrease in labour costs	**16%**
Improved routing	**46%**
CO_2 reduction	**27%**
Improved sustainability (businesses committed to sustainable goals, such as reducing their environmental footprints, CO_2 emissions)	**48%**
Increased seat belt usage	**40%**
Decreased unauthorised use of vehicles	**34%**

Services sector: precision in motion

By leveraging connected data, service fleets are transforming their daily workflows into high-performance operations, yielding the following results:

- **Strategic advantage: 81%** of service-based businesses report that their tracking solution is "very" or "extremely" beneficial to their overall fleet management.
- **Operational agility: 68%** have seen a marked increase in productivity, while 29% specifically highlighted a significant improvement in the flow of their daily operations.
- **Cost & resource efficiency:** the ability to monitor routes and behaviour has led **65%** of fleets to reduce total costs and 60% to successfully lower fuel consumption.
- **Proven financial impact:** the transition to data-driven management pays for itself quickly, with **58%** of service organisations achieving a positive ROI in less than **12** months.

KEY TAKEAWAYS:

Safety & operational mastery: the services bonus

In an industry where long-haul fatigue and road safety are paramount, European The service sector is successfully integrating safety protocols into the daily workflow, ensuring that high-velocity growth doesn't come at the cost of driver well-being:

- **Safety habit reform: 39%** of businesses reported a measurable improvement in driver safety habits and a **36%** reduction in speeding or harsh driving incidents.
- **Seat belt compliance: 40%** of survey respondents achieved an increase in seat belt usage across their mobile teams.
- **Asset protection: 34%** of businesses decreased in unauthorised vehicle use ensures that resources are dedicated solely to customer-facing billable tasks.
- **Daily management: 29%** of firms used the technology to streamline day-to-day operations, while **20%** saw a direct reduction in unproductive engine idling.

Photo: London, UK

Passenger transportation industry in Europe

Passenger transportation businesses improved productivity, compliance and reduced fuel consumption

In Europe's high-demand transit and premium livery sectors, GPS telematics have established a new gold standard for operational sovereignty, with **78% of businesses** categorising these solutions as "very" or "extremely" beneficial.

The impact on the bottom line is absolute: **64% of survey respondents** reported a measurable reduction in total fleet costs following implementation. By adopting this high-fidelity oversight, European operators are transforming traditional transit into a model of precision and passenger-first reliability.

By establishing a "connected fleet pulse" across dense metropolitan and regional networks, providers are effectively neutralising unbillable latency. This digital co-ordination has led to a remarkable **58% decrease in fuel consumption** and a **25% reduction in labour costs**.

Such granular oversight ensures that specialised drivers and high-value vehicles from executive black cars to city-wide taxi networks are deployed with maximum precision, allowing **65% of firms** to significantly improve productivity and vehicle utilisation.

This transition toward data-driven command is financially high-velocity, with **61% of the passenger transportation industry** achieving a positive ROI in **under twelve months**. This rapid capital recovery ensures that transit assets are managed with peak efficiency, allowing **57% of businesse**s to significantly improve customer service and arrival accuracy. With a **59% success rate in regulatory compliance**, European passenger transport leaders are setting a new benchmark for safe, sustainable, and consistently profitable mobility.

2026 passenger transportation: strategic goals achieved

European transit leaders are utilising the "connected fleet pulse" to balance performance with passenger expectations:

Strategic objective	Percentage of businesses that achieved this goal
Improved productivity (for example, number of jobs, vehicle utilisation)	**65%**
Regulatory compliance	**59%**
Decrease in fuel consumption	**58%**
Improved customer service	**57%**
Increased recovery rate of stolen vehicles	**57%**
Improved routing	**49%**
Improved efficiency (efficiency understood as you can achieve your results by putting the resources you have in the best way possible)	**47%**
Improved sustainability (businesses committed to sustainable goals, such as reducing their environmental footprints, CO_2 emissions)	**44%**
Improved driver safety habits	**39%**
Decrease in instances like speeding and harsh driving to reduce incidents	**39%**
Decreased unauthorised use of vehicles	**36%**
CO_2 reduction	**34%**
Increased seat belt usage	**31%**
Improved vehicle maintenance	**26%**
Decrease in labour costs	**25%**
Improved managing daily operations (Improved the day-to-day operations)	**20%**
Decrease idling	**18%**

In the passenger transportation industry—where safety, punctuality, and passenger experience are the primary benchmarks—telematics provides the critical visibility required to maintain high standards. For organisations leveraging GPS tracking, the data illustrates a clear shift toward smarter, more profitable transit:

Passenger transportation: elevating the transit experience

By integrating connected technology into their fleets, passenger transport operators are successfully balancing rising overheads with the need for superior service delivery:

- **Core operational benefit: 78%** of transportation businesses find their tracking solution "very" or "extremely" beneficial for managing the complexities of passenger transit.
- **Service excellence:** a significant **57%** of operators reported a direct improvement in customer service, ensuring more reliable and professional passenger experiences.
- **Cost & environmental efficiency: 64%** of fleets have successfully reduced overall costs, while 58% have lowered their fuel consumption through optimised routing and idle reduction.
- **Enhanced performance:** the technology has driven a **65%** increase in productivity across the sector, allowing fleets to do more with their existing assets.
- **Rapid financial gains: 61%** of passenger transportation organisations achieved a positive ROI in under a year, proving that the investment in safety and visibility pays for itself quickly.

KEY TAKEAWAYS:

Safety & operational mastery: the transit bonus

In an industry where long-haul fatigue and road safety are paramount, European Beyond the balance sheet, the passenger transportation sector is leveraging telematics to protect its most valuable cargo: the passenger.

- **Risk mitigation: 39%** of operators achieved a significant decrease in speeding and harsh driving, directly reducing incident rates on European roads.
- **Driver coaching: 39%** of respondents successfully improved driver safety habits through real-time feedback and data-led training.
- **Asset integrity: 36%** of businesses decreased unauthorised vehicle use ensuring that vehicles are used strictly for authorised passenger routes.
- **Passenger protection: 31%** of firms reported an increase in seat belt usage, reinforcing a culture of safety across the transit network.

Photo: London, UK

Government sectorn Europe

The government sector improved productivity, citizenship satisfaction and sustainability

In the essential European government sector, GPS telematics have become a critical instrument for modern governance, with **78% of agencies** categorising these solutions as "very" or "extremely" beneficial. The impact on public fund management is definitive: a substantial **68% of respondents** reported a measurable reduction in fleet costs following implementation.

By adopting this high-velocity data oversight, municipalities and state-level departments are transforming traditional logistics into a model of fiscal transparency.Also, by establishing a near real-time "connected fleet pulse" across diverse public works and administrative fleets, departments are successfully neutralising operational latency. This transition has allowed **54% of agencies** to significantly improve productivity, ensuring that public services, from waste management to infrastructure repair, are delivered with maximum efficiency.

Furthermore, the shift toward digital coordination has enabled **58% of organisations** to meet the rigorous **regulatory compliance** standards mandated across the EU.

This transition toward data-driven oversight is financially self-sustaining, with **46% of the government sector** achieving a positive ROI in **under twelve months**. This rapid capital recovery ensures that public assets are managed with the highest level of fiduciary responsibility, allowing for the reinvestment of savings into community-facing initiatives.

With a **16% reduction in fuel consumption** and a **19% improvement in daily operations**, European government fleets are setting a new global benchmark for sustainable and accountable public sector management.

2026 government sector: strategic goals achieved

The European public sector is leveraging telematics to balance safety, sustainability, and service quality:

Strategic objective	Percentage of businesses that achieved this goal
Regulatory compliance	**58%**
Improved productivity (for example, number of jobs, vehicle utilisation)	**54%**
Improved customer service	**44%**
Improved sustainability (businesses committed to sustainable goals, such as reducing their environmental footprints, CO_2 emissions)	**42%**
Improved efficiency (efficiency understood as you can achieve your results by putting the resources you have in the best way possible)	**40%**
Increased seat belt usage.	**40%**
Decrease in labour costs	**21%**
Improved routing	**40%**
Improved vehicle maintenance	**37%**
Improved fuel tax credits claim	**37%**
CO_2 reduction	**37%**
Decreased idling	**30%**
Improved driver safety habits	**30%**
Decreased unauthorised use of vehicles	**28%**
Decrease in instances like speeding and harsh driving to reduce incidents	**26%**
Improved managing daily operations (improved the day-to-day operations)	**19%**
Decrease in fuel consumption	**16%**

Government & public sector: driving fiscal accountability

By implementing connected fleet solutions, government agencies are transforming raw data into public-sector efficiency, achieving the following benchmarks:

- **Strategic utility: 78%** of government fleet managers categorise their tracking solution as "very" or "extremely" beneficial for navigating the unique complexities of public service.
- **Fiscal impact:** a significant **68%** of government organisations successfully reduced their overall fleet costs, demonstrating the power of data in protecting public budgets.
- **Operational steadying:** beyond cost savings, **54%** reported an increase in productivity, while 19% saw a direct improvement in the flow of daily operations and service delivery.
- **Sustainability & consumption: 16%** of agencies have already leveraged the technology to reduce fuel consumption, supporting broader environmental and carbon-reduction mandates.
- **Proven investment:** despite the often complex procurement cycles of the public sector, **46%** of government fleets achieved a positive ROI in under 12 months.

KEY TAKEAWAYS:

Safety & social responsibility: the public sector bonus

In an industry where long-haul fatigue and road safety are paramount, Beyond the balance sheet, European government agencies are using the "connected fleet pulse" to drive a culture of safety and driver accountability:

- **Seat belt compliance: 40%** of agencies reported a measurable increase in seat belt usage across their fleets.
- **Safer driver habits: 30%** of respondents successfully improved overall driver safety habits through data-led coaching.
- **Risk mitigation: 26%** of agencies saw a decrease in high-risk instances such as speeding and harsh driving, directly protecting public assets and citizen safety.
- **Authorised use: 28%** of agencies decreased in the unauthorised use of vehicles ensures that public equipment is utilised strictly for its intended community purpose.

Photo: Germany

Safety visual intelligence

SAFETY VISUAL INTELLIGENCE

GOALS ACHIEVED SINCE IMPLEMENTING IN-CAB VIDEO SOLUTION ACROSS ALL INDUSTRIES:

IMPROVED DRIVER SAFETY	73%
REDUCED FALSE CLAIMS	68%
REDUCED SAFETY INCIDENT COSTS	63%
REDUCED INSURANCE COSTS	45%

Protecting European drivers, businesses and bottom lines

In the 2026 European industrial landscape, video telematics have transitioned from a passive recording tool to an essential "visual shield" for fleet operations. Currently, **79% of businesses across all industries** categorise in-cab video as "very" or "extremely" beneficial to their management strategy.

This technology provides an unprecedented level of protection for both drivers and the balance sheet; cross-industry implementation has led to a **73% improvement in driver safety** and a **68% reduction in false claims.**

The impact is particularly profound in high-risk sectors like **general freight**, where **80%** of operators reported **improved safety** outcomes, and the **services** sector, where nearly half of all firms successfully drove down insurance premiums.

By providing a clear, objective record of the road, video telematics effectively neutralises the financial and reputational risks associated with road incidents, allowing European fleet leaders to exonerate drivers from inaccurate liability with high-definition certainty.

79%

of businesses across all industries stated that in-cab video "very" or "extremely" beneficial to manage their fleet.

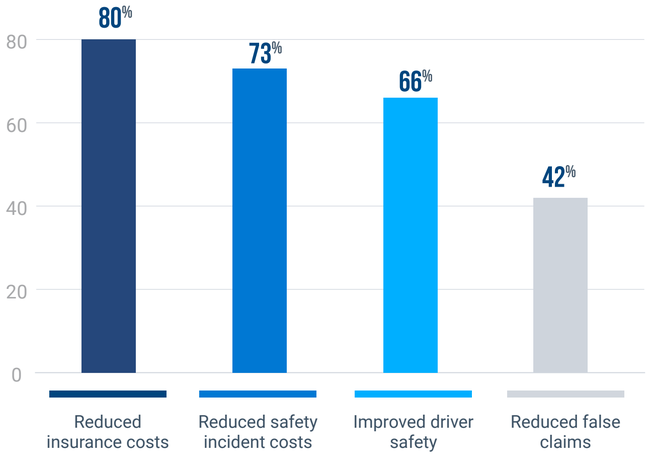
↑47%

of respondents across all industries who have a video solution achieved a positive ROI in one year or less.

2026 European video telematics performance matrix

The adoption of dash cam solutions is delivering a double-win: safer roads and faster capital recovery.

General freight



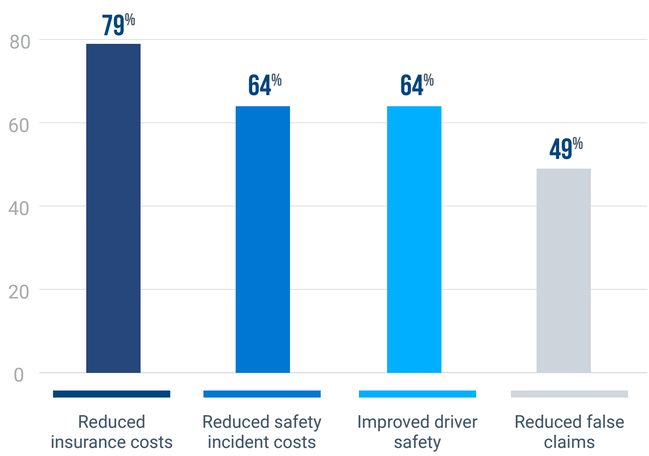
79%

of general freight businesses stated that in-cab video is "very" or "extremely" beneficial to manage their fleets.

40%

of respondents in the industry who have a video solution achieved a positive ROI under 12 months.

Services



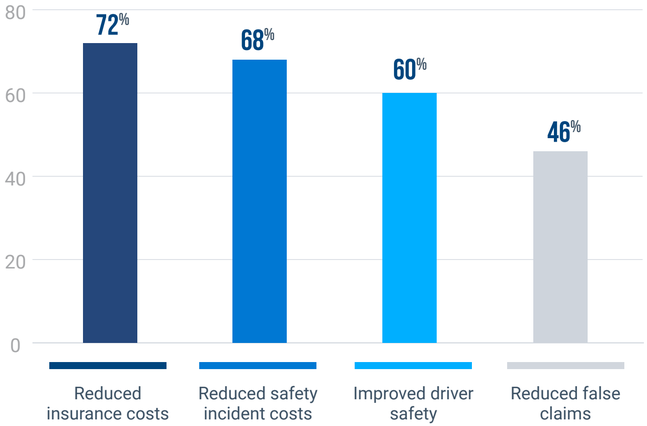
79%

of services businesses stated that in-cab video "very" or "extremely" beneficial to manage their fleets.

55%

of respondents in the industry who have a video solution achieved a positive ROI under 12 months.

Passenger transportation



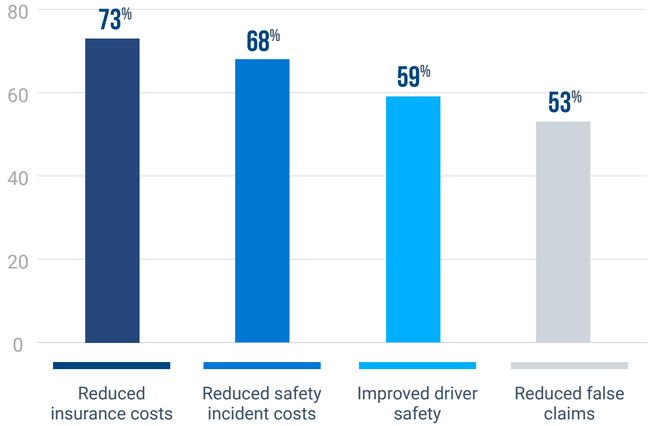
81%

of passenger transportation businesses stated that in-cab video "very" or "extremely" beneficial to manage their fleets.

46%

of respondents in the industry who have a video solution achieved a positive ROI under 12 months.

Government



85%

of government businesses stated that in-cab video "very" or "extremely" beneficial to manage their fleets.

62%

of respondents in the industry who have a video solution achieved a positive ROI under 12 months.

Video telematics helps improve key areas of businesses to keep them safe and competitive

Goal Achieved	General freight	Services	Passanger Transportation	Government
Improved driver safety	80%	79%	72%	73%
Reduced false claims	73%	64%	68%	68%
Reduced safety incident costs	66%	64%	60%	59%
Reduced insurance costs	42%	49%	46%	53%

Sector spotlight: strategic gains

- **General freight (the safety leader):** this sector sees the highest lift in driver protection, with **80%** of firms reporting safer cohorts. Freight managers are also the most successful at neutralising legal risks, with 73% using video to strike down false claims.
- **Government (the efficiency king):** public sector fleets lead the way in fiscal speed, with **62%** of organisations achieving a positive ROI in under **12** months. They also secure the best insurance outcomes, with **53%** reducing premiums.
- **Services (the agile market):** in the service industry, the move toward video is a rapid-response strategy; **55%** of respondents realised a full return on their investment within the first year.
- **Passenger transportation (the reputation guard):** with **81%** of transit managers backing the tech, video has become the industry standard for protecting passengers and the brand's public integrity.

SAFETY SPOTLIGHT:

Safety spotlight: the visual shield of European video telematics

In the highly competitive European landscape of 2026, video telematics have moved beyond simple recording to become a critical instrument for **preventative health** and **incident mitigation**. Across every key sector, the data reveals a profound impact on high-risk behaviours, particularly in **fatigue management.**

In the general freight and Services industries, a staggering **42% of firms** successfully reduced driver fatigue by up to 60%, while the passenger transportation and government sectors saw majority gains in similar high-impact ranges.

By establishing this "visual pulse" within the cabin, European leadership can transition from reactive accident investigation to **proactive risk coaching**. This digital oversight effectively neutralises the physiological risks, such as fatigue and distraction, that lead to catastrophic failures on the road and on-site.

The 2026 data proves that visual evidence is no longer just about liability; it is about the active protection of a company's most valuable asset: its drivers.

How video telematics improves European road safety

The implementation of in-cab video across Europe is driving significant reductions in high-risk driving behaviors. Below are the percentage of businesses achieving specific safety improvements:

Incident & speeding suppression

Video intelligence acts as a digital governor, encouraging safer speeds and significantly lowering crash rates across the continent.

Goal Risk Reduction	General freight	Services	Passenger Transportation	Government
Incidents/Crashes Reduced (>21%)	79%	85%	85%	88%
Speeding Decreased (>21%)	71%	68%	67%	68%

Fatigue & distraction mitigation

The primary defense against human error. In general freight, over 50% of operators reduced driver distraction by 40% or more.

Goal Risk Reduction	General freight	Services	Passenger Transportation	Government
Fatigue Reduced (41–60%)	42%	42%	37%	30%
Distraction Reduced (>40%)	52%	40%	49%	44%

Compliance: seat belts & tailgating

Ensuring fundamental safety protocols are met is a top priority for European managers in 2026.

Goal Risk Reduction	General freight	Services	Passenger Transportation	Government
Seat Belt Usage Increased (>41%)	49%	49%	55%	47%
Tailgating Reduced (>21%)	88%	90%	90%	80%

Strategic industry highlights

- **Services industry mastery:** this sector leads the way in tailgating reduction, with a massive **90%** of firms achieving a reduction of at least **21%**, and **50%** achieving a **21– 40%** reduction specifically.
- **Governmental compliance:** the public sector shows the strongest results in fundamental safety, with **43%** of organisations increasing seat belt usage by **41– 60%**.
- **Passenger transportation excellence:** safety is the hallmark of the transit sector, where **85%** of operators have successfully reduced incidents or crashes by more than **21%** through video-led coaching.
- **Freight resilience:** In the high-volume freight sector, **52%** of businesses have utilised video to cut driver distraction by over **40%**, proving that even on long-haul routes, vigilance can be maintained.

How video telematics helps reduce driver fatigue?

Driver fatigue	General freight	Services	Passenger transportation	Government
Less than 5%	4%	9%	10%	16%
From 5% – 20%	21%	17%	17%	19%
From 21% to 40%	23%	21%	30%	27%
From 41% to 60%	42%	42%	37%	30%
Over 60%	10%	11%	7%	9%

How video telematics helps reduce incidents or crashes?

Incidents or crashes	General freight	Services	Passenger transportation	Government
Less than 5%	4%	–	4%	1%
From 5% – 20%	18%	15%	10%	11%
From 21% to 40%	43%	44%	39%	41%
From 41% to 60%	25%	33%	37%	40%
Over 60%	11%	8%	9%	7%

How video telematics helps reduce driver distraction?

Driver distraction	General freight	Services	Passenger transportation	Government
Less than 5%	5%	11%	3%	4%
From 5% – 20%	13%	10%	15%	14%
From 21% to 40%	30%	39%	33%	40%
From 41% to 60%	26%	26%	28%	20%
Over 60%	26%	14%	21%	24%

How video telematics helps decrease speeding?

Speeding	General freight	Services	Passenger transportation	Government
Less than 5%	9%	14%	17%	15%
From 5% – 20%	21%	18%	17%	17%
From 21% to 40%	31%	29%	31%	27%
From 41% to 60%	29%	26%	27%	21%
Over 60%	11%	13%	9%	20%

How video telematics helps increase seat belt usage?

Seat belt usage	General freight	Services	Passenger transportation	Government
Less than 5%	7%	6%	12%	3%
From 5% – 20%	15%	17%	16%	10%
From 21% to 40%	30%	29%	18%	41%
From 41% to 60%	41%	38%	40%	43%
Over 60%	8%	11%	15%	4%

How video telematics helps reduce tailgating?

Tailgating	General freight	Services	Passenger transportation	Government
Less than 5%	7%	3%	4%	7%
From 5% – 20%	5%	12%	7%	12%
From 21% to 40%	46%	50%	45%	43%
From 41% to 60%	28%	23%	29%	16%
Over 60%	14%	17%	16%	21%

Asset tracking management

Photo: Piazza Cordusio , Milano, Italy

ASSET TRACKING TECHNOLOGY

GOALS ACHIEVED SINCE IMPLEMENTING AN ASSET TRACKING SOLUTION ACROSS ALL INDUSTRIES:

IMPROVED ASSET/TRAILER SECURITY	68%
IMPROVED ASSET/TRAILER UTILISATION	65%
IMPROVED EFFICIENCY/PRODUCTIVITY	60%
IMPROVED ASSET VISIBILITY	55%
IMPROVED SAFETY	47%
IMPROVED TRAILER/ASSET MAINTENANCE	43%
REDUCED THEFT	37%
REDUCED INSURANCE COSTS AND BETTER INSURANCE CLAIMS FOR LOST/STOLEN ASSETS	33%

Asset tracking: enhancing equipment utilisation and boosting security

In the demanding European construction landscape, asset tracking has evolved into a critical shield for both project timelines and high-value machinery. The latest data reveals that **79% of European construction firms** now validate the strategic importance of this technology, categorising it as "very" or "extremely" beneficial to their daily operations.

Security and safety are the primary beneficiaries of this digital oversight. Currently, **68% of companies** report improved asset and trailer security, while **42%** have successfully enhanced their overall safety outcomes.

This technical command is vital for mitigating the high cost of site disruptions, resulting in a **37% reduction in theft** and a **63% improvement in both efficiency and productivity**. By maintaining a constant "sector pulse" on every piece of equipment, construction leaders are not only securing their fleet against loss but also establishing a sophisticated framework for preventative health and maintenance. This ensures the lifecycle of every asset is maximised, directly protecting long-term shareholder value.

Strategic & fiscal impact

- **Strategic maturity:** with **79%** of construction managers relying on this data, asset tracking is now a "license to operate" for large-scale European infrastructure projects.
- **Insurance resilience:** the construction sector is outperforming the general market in insurance gains, with **37%** of firms reducing premiums and improving claims for lost or stolen assets.
- **Rapid capital recovery:** the fiscal argument for tracking is clear; **36%** of European construction respondents achieved a positive ROI in under **12** months, outpacing the cross-industry average of **30%**.
- **Productivity gains:** by pushing asset utilisation to **66%**, firms are effectively neutralising the "unbillable latency" of idle machinery, ensuring that every asset on-site is contributing to the bottom line.

73%

of businesses across all industries stated that asset tracking "very" or "extremely" beneficial to manage their fleets.

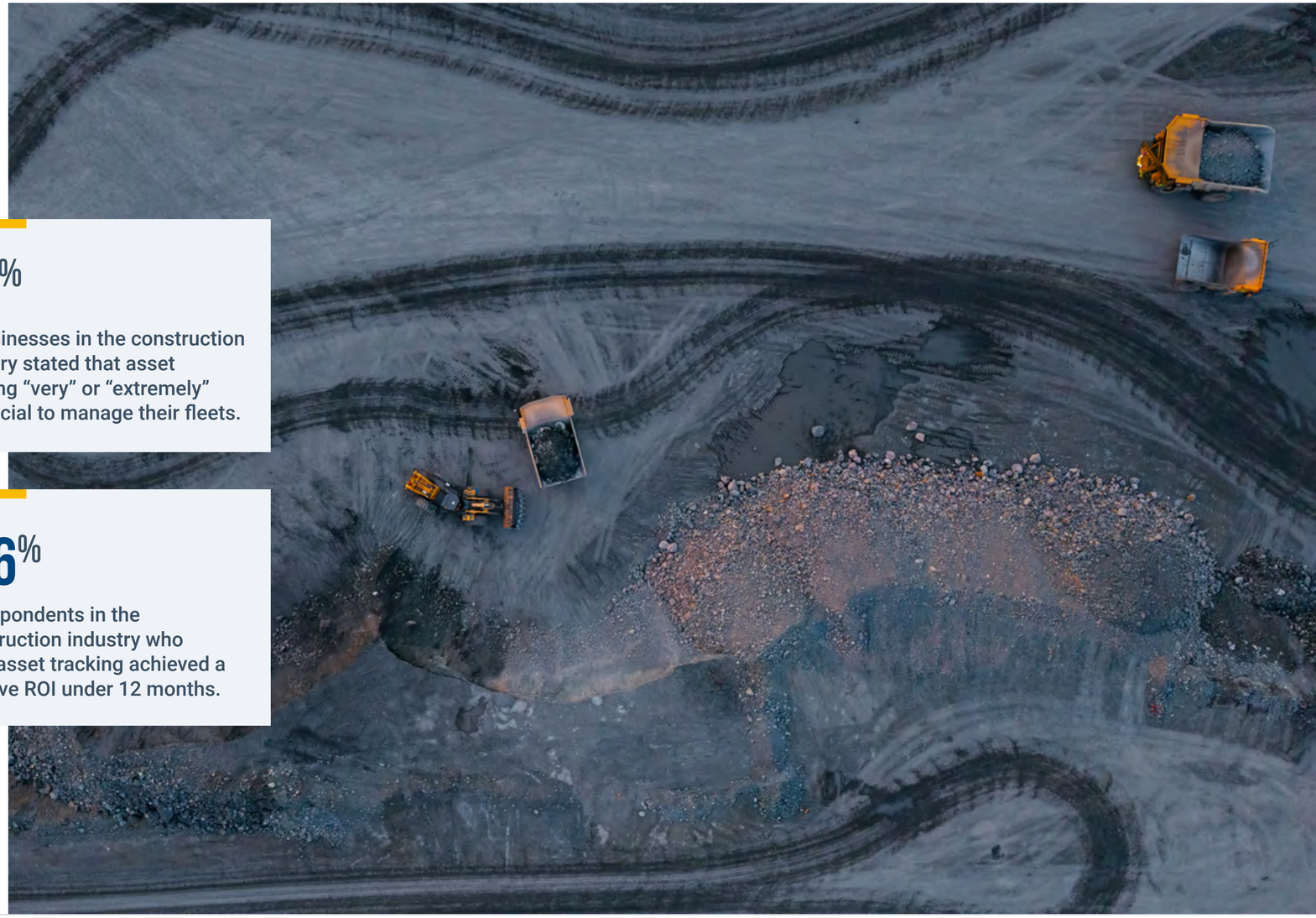
↑30%

of respondents across all industries who have asset tracking achieved a positive ROI under 12 months.

Construction

Goals achieved since implementing asset tracking:

Improved asset/trailer security	**68%**
Improved asset/trailer utilisation	**66%**
Improved efficiency/productivity	**63%**
Improved asset visibility	**51%**
Improved safety	**42%**
Reduced theft	**37%**
Reduced insurance costs and better insurance claims for lost/stolen assets	**37%**
Improved trailer/asset maintenance	**36%**



79%

of businesses in the construction industry stated that asset tracking "very" or "extremely" beneficial to manage their fleets.

↑36%

of respondents in the construction industry who have asset tracking achieved a positive ROI under 12 months.

The future of mobility (EVs)

THE FUTURE OF MOBILITY (EVS)

GOALS ACHIEVED AFTER COMBINING THE USE OF GPS FLEET TRACKING SOLUTION AND ELECTRIC VEHICLES:

IMPROVE FLEET VISIBILITY	75%
IMPROVE EFFICIENCY	67%
IMPROVE MANAGING DAILY OPERATIONS	63%
REDUCE OPERATIONAL COSTS	56%
IMPROVE MAINTENANCE COSTS	44%
IMPROVE BATTERY STATUS VISIBILITY	43%
IMPROVE SUSTAINABILITY	36%
REDUCE CO_2 EMISSIONS	34%
IDENTIFY VEHICLE ELECTRIFICATION SUITABILITY	22%

The strategic shift toward electric vehicles for European fleets

The global shift toward electric vehicles (EVs) has moved beyond a conceptual trend to become the foundational pillar of modern, low-emission logistics across Europe. As organisations increasingly align their operations with stringent environmental benchmarks and urban access regulations, the integration of EV technology represents a critical move toward long-term sustainability and operational decarbonisation.

This transition is not merely about replacing internal combustion engines; it is a sophisticated evolution of the "sector pulse." In 2026, new energy architectures and smart charging infrastructures have gained significant ground as the primary drivers of fleet strategy.

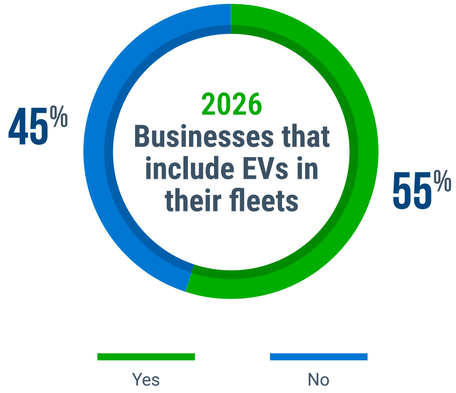
By adopting these emerging technologies, forward-thinking European enterprises are effectively neutralising their carbon exposure while securing a first-mover advantage. This proactive oversight ensures that the fleet remains both fiscally resilient and environmentally accountable, transforming the traditional transport model into a high-efficiency, sustainable asset.

State of the market: EV & hybrid adoption in Europe

The 2026 data confirms that the majority of European fleets have already crossed the electric threshold, with a significant wave of expansion planned for the next 36 months.

Does your fleet include EVs, or hybrids?

Current adoption: 55% of European businesses now include EVs or hybrids in their fleets.



Fleet electrification in Europe

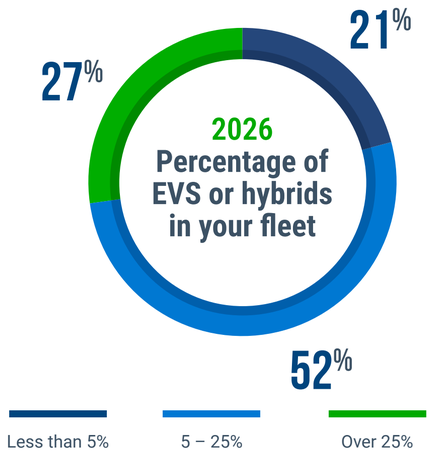
Businesses that plan to boost the electrification of their fleets.

The upcoming surge: commitment is accelerating. While only 8% have no current plans, a massive **79% of European fleets** plan to boost their electrification within the next **1 to 5 years**.

↑8%	↑14%	↑40%	↑39%
No current plans	Under 12 months	1 year to <3 years	3 years to 5 years

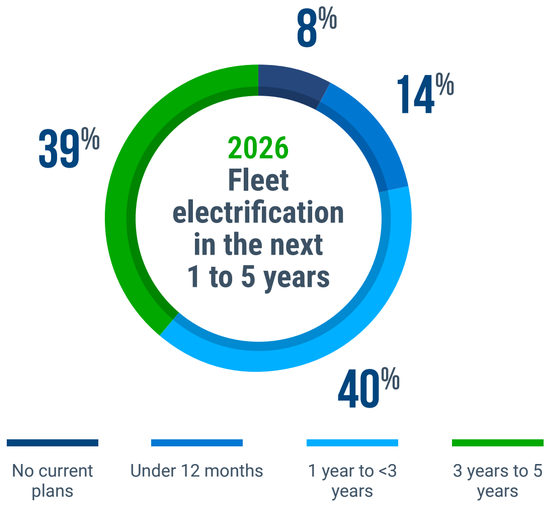
What percentage of your fleet include EV or hybrids?

Fleet density: for those who have made the switch, the transition is deep: **52% of fleets** have converted between **5% and 25%** of their total volume, while a leading 27% of operators have already surpassed the **25% electrification mark.**



Fleet electrification in Europe

Businesses that plan to boost the electrification of their fleets.
The upcoming surge: commitment is accelerating. While only **8%** have no current plans, a massive **79% of European fleets** plan to boost their electrification within the next **1 to 5 years.**



KEY TAKEAWAYS

Goals achieved after combining the use of GPS fleet tracking solution and electric vehicles:

- **75%** Improve fleet visibility
- **67%** Improve efficiency
- **63%** Improve managing daily operations
- **56%** Reduce operational costs
- **44%** Improve maintenance costs
- **43%** Improve battery status visibility
- **36%** Improve sustainability
- **34%** Reduce CO_2 emissions
- **22%** Identify vehicle electrification suitability

Strategic cost management

COST SAVINGS AFTER COMBINING THE USE OF GPS FLEET TRACKING SOLUTION AND FLEET MANAGEMENT:

FUEL COST REDUCTION	58%
ACCIDENT COST REDUCTION	33%
LABOUR COST REDUCTION	18%
VEHICLE MAINTENANCE COST REDUCTION	24%
DECREASE IN INSURANCE COSTS	22%

European fleets adopt cost-saving strategies to drive strategic profitability

In the fluctuating European economy, businesses have moved beyond viewing fleet technology as an overhead. Instead, it has become the primary engine for operational gains. The latest data reveals that across all sectors, European enterprises are leveraging deep-data insights to insulate their margins from rising external costs and localised inflationary pressures.

The fuel efficiency benchmark

Fuel reduction remains the most immediate "win" for the European market. The **construction sector (68%)** is the standout leader in this category, followed closely by **general freight (59%)** and **services (58%)**. By tapping into high-fidelity tracking, these sectors are neutralising the sting of volatile energy prices through precision AI-routing and aggressive idle-time monitoring.

The labour & maintenance synergy

Efficiency is being refined at the workforce level, with the **services sector (25%)** realising the most significant reduction in labour costs. Across all industries, there is a clear shift toward a proactive "preventative health" model; **vehicle maintenance costs have dropped by an average of 24%**, with general freight and services leading the charge. This suggests that high-performing European firms are successfully moving away from reactive "break-fix" models to keep assets road-ready for longer durations.

Insuring the future through risk mitigation

While the **government sector (10%)** shows a more conservative trend in insurance savings, the **services (29%)** and **construction (20%)** industries are seeing a performance uplift. By providing underwriters with verifiable safety data and "visual pulse" evidence from in-cab video solutions, these fleets are successfully driving down premiums and reducing the long-term cost of risk.

2026 Europe	All Industries	Construction	General freight	Government	Services
Fuel Cost Reduction	58%	68%	59%	55%	58%
Accident Cost Reduction	33%	31%	30%	29%	39%
Labour Cost Reduction	18%	19%	13%	16%	25%
Vehicle Maintenance Cost Reduction	24%	20%	24%	21%	26%
% Decrease in Insurance Costs	22%	20%	18%	10%	29%

KEY TAKEAWAYS

Strategic takeaway

The services industry appears to be the most efficient "all-rounder" in the European market, securing the highest savings in accidents, maintenance, insurance, and labour. Meanwhile, construction continues to find its greatest competitive edge through massive fuel-spend suppression. This data proves that in 2026, profitability is no longer just about revenue — it's about the precision of cost avoidance.

Overcoming operational friction

FUEL CONSUMPTION IS ONE OF THE MOST IMPORTANT COSTS FOR A FLEET:

10%	FOR SMALL FLEETS
27%	FOR MID-SIZED FLEETS
34%	FOR ENTERPRISE

Deciphering the operational budget to drive tangible results

Currently, fleet costs have moved from the "overhead" category to a critical, volatile pillar of the enterprise balance sheet. For organisations ranging from agile SMBs to sprawling corporate entities, the budget is no longer a static document but a high-fidelity "sector pulse" that must be managed with precision.

The data confirms that **fuel** and **driver salaries** remain the twin titans of expenditure, frequently consuming a combined **50% to 60% of the total operational budget** for a substantial portion of the market.

By establishing deep visibility into these costs, European businesses are transitioning from simple expense tracking toward a sophisticated model of **resource optimisation**. This strategic focus allows leaders to effectively neutralise unbillable latency and reclaim capital that was previously lost to inefficient idling or suboptimal routing. Turning what is traditionally a "sunk cost" into a measurable driver of bottom-line profitability is now the hallmark of a resilient, tech-first fleet operation in Europe.

The anatomy of the European fleet budget

Based on the latest data across small, medium, and enterprise sectors, here is how operational capital is distributed:

The dominant overhead: salaries & fuel

These two categories represent the most significant variable pressures on European margins.

Fuel: a staggering **34%** of enterprise fleets and **27%** of mid-sized firms allocate a massive **20%** of their total budget to the pump. For **10%** of small businesses, this figure spikes even higher to **30%** of their total spend.

Driver salaries: this is the single largest line item for most; **62%** of enterprise fleets report that salaries account for at least **25%** of their budget, with a notable portion of mid-sized firms **(13%)** seeing this cost climb to **35%**.

Asset lifecycle: depreciation & maintenance

The "hidden" costs of keeping wheels on the road require constant oversight to prevent capital erosion.

Depreciation: for **31%** of enterprise fleets, vehicle acquisition costs represent **15%** of their budget, while **34%** of small businesses allocate **20%**, highlighting the heavy weight of initial investment for smaller operators.

Maintenance & repairs: European fleets are successfully containing "break-fix" costs. Roughly **50%** of all fleets keep tyre maintenance at **5%** of their budget, while engine maintenance largely sits between **5%** and **10%**.

The sompliance & safety shield: insurance & tax

Insurance: roughly **50%** of the market—regardless of fleet size—has managed to keep insurance premiums at **5%** of the operational budget, likely bolstered by the **58%** adoption of in-cab Video for risk mitigation.

Tax: for over **54%** of fleets, tax remains a controlled variable at **5%** of the budget, though **34%** of enterprises see this rise to **10%** due to the complexity of cross-border European regulations.

What percentage of your fleet's operational budget do the following costs represent?

Fuel	Small: (1 – 29 vehicles)	Medium: (30 – 149 vehicles)	Large/Enterprise: (150+ vehicles)
5%	5%	5%	3%
10%	10%	10%	10%
15%	22%	20%	24%
20%	27%	32%	34%
25%	17%	21%	16%
30%	10%	6%	8%

Tyre replacement and maintenance	Small: (1 – 29 vehicles)	Medium: (30 – 149 vehicles)	Large/Enterprise: (150+ vehicles)
5%	54%	50%	54%
10%	35%	38%	38%
15%	7%	9%	6%

Engine maintenance	Small: (1 – 29 vehicles)	Medium: (30 – 149 vehicles)	Large/Enterprise: (150+ vehicles)
5%	40%	35%	30%
10%	25%	31%	32%
15%	21%	18%	19%
20%	8%	10%	11%
25%	2%	3%	4%

Repairs	Small: (1 – 29 vehicles)	Medium: (30 – 149 vehicles)	Large/Enterprise: (150+ vehicles)
5%	41%	43%	41%
10%	39%	37%	37%
15%	13%	15%	15%
20%	2%	2%	2%

Depreciation (cost of vehicle acquisition)	Small: (1 – 29 vehicles)	Medium: (30 – 149 vehicles)	Large/Enterprise: (150+ vehicles)
5%	7%	6%	6%
10%	18%	17%	20%
15%	23%	23%	31%
20%	34%	35%	30%
25%	16%	12%	10%
30%	–	3%	3%

Financing	Small: (1 – 29 vehicles)	Medium: (30 – 149 vehicles)	Large/Enterprise: (150+ vehicles)
5%	44%	48%	48%
10%	29%	27%	31%
15%	9%	12%	11%
20%	10%	7%	6%

Vehicle rental costs	Small: (1 – 29 vehicles)	Medium: (30 – 149 vehicles)	Large/Enterprise: (150+ vehicles)
5%	44%	44%	47%
10%	31%	28%	33%
15%	5%	5%	4%

Driver salaries	Small: (1 – 29 vehicles)	Medium: (30 – 149 vehicles)	Large/Enterprise: (150+ vehicles)
5%	4%	5%	4%
10%	8%	7%	6%
15%	12%	10%	11%
20%	16%	16%	16%
25%	26%	26%	25%
30%	20%	17%	18%
35%	11%	13%	14%
40%	1%	5%	4%

Insurance	Small: (1 – 29 vehicles)	Medium: (30 – 149 vehicles)	Large/Enterprise: (150+ vehicles)
5%	47%	49%	52%
10%	37%	36%	34%
15%	9%	12%	10%
20%	5%	3%	3%

Allowances	Small: (1 – 29 vehicles)	Medium: (30 – 149 vehicles)	Large/Enterprise: (150+ vehicles)
5%	48%	50%	47%
10%	35%	34%	32%
15%	12%	9%	14%

Tax	Small: (1 – 29 vehicles)	Medium: (30 – 149 vehicles)	Large/Enterprise: (150+ vehicles)
5%	56%	59%	54%
10%	32%	28%	34%
15%	6%	7%	6%
20%	4%	4%	4%

Fleet manager's challenges

TOP 5 CHALLENGES THAT FLEET MANAGERS FACE EVERYDAY:

1. DRIVER FATIGUE & SAFETY 68%
2. MEETING CUSTOMER DEMANDS 67%
3. FUEL COSTS 63%
4. COMPETITIVE PRESSURE 58%
5. COMPLIANCE & REGULATION 57%

The top 10 challenges that fleet managers face everyday

Small businesses

Small fleet resilience: navigating the 2026 high-stakes balancing act

Running a small fleet in 2026 has become a high-stakes balancing act where operational friction meets economic pressure. The modern European manager is no longer just supervising vehicles; they are navigating a complex "volatility trap."

The most acute pressure point for local operators is meeting customer demands and expectations **(66%)**, proving that in a hyper-connected market, "just showing up" is no longer enough to maintain a competitive edge. This is compounded by a persistent safety crisis, with driver fatigue and safety **(64%)** ranking as a top-tier daily disruption that threatens both human capital and business reputation.

The financial "sting" of 2026 is felt most at the pump and in the ledger. Fuel costs **(61%)** and Insurance premiums **(58%)** continue to squeeze margins, while competitive pressure **(56%)** forces small businesses to do more with less. Beyond the visible costs, a "red tape jungle" of compliance **(53%)** and increased regulatory requirements **(51%)** creates a significant administrative bottleneck.

When combined with a chronic shortage of quality drivers and technicians **(50%)**, these overlapping challenges can quickly stall growth. By identifying these specific hurdles, the 2026 pulse provides a roadmap for SMBs to trade daily chaos for a streamlined, professional, and resilient edge.

The strategic shift: from uncertainty to command

- **Customer-first resilience:** with **66%** of managers citing customer expectations as their primary burden, the shift toward near real-time ETA transparency is now a survival requirement.
- **The safety shield:** as **64%** grapple with fatigue, the move toward in-cab video and proactive coaching is the only way to insulate the business from difficult liability.
- **Margin protection:** in a world of **61%** fuel pressure, AI route optimisation isn't just a tech upgrade—it's a direct intervention in the company's profitability.

KEY TAKEAWAYS

SMALL BUSINESSES

THE TOP 10 CHALLENGES THAT FLEET MANAGERS FACE EVERYDAY

DAILY CHALLENGES	
DRIVER FATIGUE AND SAFETY	64%
MEETING CUSTOMERS DEMANDS AND EXPECTATION	66%
FUEL	61%
INSURANCE COSTS	58%
COMPETITIVE PRESSURE	56%
INCREASED COMPLEXITY OF SERVICE OFFERING	51%
COMPLIANCE	53%
INCREASED REGULATORY REQUIREMENTS	51%
INEFFICIENCIES IN SCHEDULING/ DISPATCHING	28%
NOT ENOUGH QUALITY DRIVERS AND TECHNICIANS	50%

Mid-sized businesses

Mid-market momentum: overcoming scaling friction in 2026

Managing a mid-sized fleet in Europe in 2026 is no longer a simple exercise in daily survival; it is a complex mission of managing the "growing pains" of an expanding enterprise. The most critical pressure point for these European managers is **driver fatigue and safety (68%)**, followed immediately by the escalating weight of **meeting customer demands and expectations (67%)**.

In the mid-market, as fleets scale, the demand for transparency and speed grows exponentially. Businesses are finding themselves caught in a pincer movement: battling **competitive pressure (55%)** from agile local players while simultaneously trying to match the service integrity of massive corporate giants.

The financial "sting" at this scale is intensified by the volume of miles driven. **Fuel costs (63%)** represent the most significant drain on quarterly margins, while the "red tape Jungle" of **regulatory requirements (55%)** and **insurance costs (55%)** creates a persistent strategic bottleneck.

Furthermore, as the complexity of service offerings increases, the lack of **quality drivers and technicians (49%)** threatens to stall the momentum of otherwise healthy firms. By identifying these specific pain points, the 2026 Pulse provides a roadmap for mid-sized enterprises to trade "scaling friction" for a sharper, more profitable edge.

Strategic solutions for the mid-market

- **The safety mandate:** with **68%** of managers citing fatigue as their primary risk, the implementation of proactive safety technology is no longer an option—it is the only way to insulate the brand from liability.
- **Fuel resilience:** at a **63%** impact rate, fuel is the largest variable cost. AI-driven routing is the most effective tool to reclaim these lost margins and support European sustainability goals.
- **Scaling with precision:** to combat the **42%** impact of scheduling inefficiencies, transitioning to dynamic dispatching allows mid-sized firms to behave with the agility of a small business and the power of an enterprise.

KEY TAKEAWAYS

MID-SIZED BUSINESSES

THE TOP 10 CHALLENGES THAT FLEET MANAGERS FACE EVERYDAY

DAILY CHALLENGES	
DRIVER FATIGUE AND SAFETY	68%
MEETING CUSTOMERS DEMANDS AND EXPECTATION	67%
FUEL	63%
COMPETITIVE PRESSURE	55%
INCREASE COMPLEXITY OF SERVICE OFFERINGS	55%
REGULATORY REQUIREMENTS	55%
INSURANCE COSTS	55%
COMPLIANCE	53%
NOT ENOUGH QUALITY DRIVERS/TECHNICIANS	49%
INEFFICIENCIES SCHEDULING AND DISPATCHING	42%

Enterprise

Enterprise sovereignty: strategic risk management in the 2026 European market

Leading a European enterprise fleet in 2026 is a sophisticated exercise in strategic risk management. At this scale, the most critical pressure point for corporate leaders has shifted toward **driver fatigue and safety (73%)**, a clear indication that protecting human capital and brand reputation is the ultimate priority.

This is followed closely by the dual mandate of **compliance (69%)** and meeting **customer demands and expectations (68%)**. In the enterprise space, "good enough" is no longer a viable strategy; these organizations are battling to maintain operational integrity while navigating an environment where **competitive pressure (64%)** from global disruptors threatens established market share.

The financial "sting" at the enterprise level is magnified by the sheer volume of assets in play. **Fuel costs (64%)** and increased **regulatory requirements (64%)** create a persistent drag on scalability, while the "red tape jungle" of **insurance costs (56%)** acts as a sophisticated barrier to efficiency. Furthermore, the chronic shortage of **quality drivers and technicians (54%)** and rising **labour costs (51%)** mean that even the most robust growth strategies can be compromised by a lack of specialised talent.

By identifying these enterprise-level pain points, the 2026 connected fleet pulse provides a roadmap for leaders to trade "operational friction" for a more agile, data-driven competitive advantage.

Strategic mandates for the enterprise

- **The safety sovereignty:** with **73%** of leaders identifying fatigue as their primary risk, enterprise-grade safety ecosystems (combining video telematics and AI-driven behaviour analysis) are now the standard for protecting the balance sheet.
- **Regulatory resilience:** as **69%** grapple with compliance and **64%** face new regulatory hurdles, automated reporting is the only way to maintain the "license to operate" without massive administrative overhead.
- **Fuel & ESG (environmental, social, & governance) leadership:** with fuel at a **64%** impact rate, enterprise fleets are leveraging AI to not only protect margins but to meet the aggressive CO_2 reduction targets required by European law.

KEY TAKEAWAYS

ENTERPRISE

THE TOP 10 CHALLENGES THAT ENTERPRISE FLEET MANAGERS FACE EVERYDAY

DAILY CHALLENGES	
DRIVER FATIGUE AND SAFETY	73%
COMPLIANCE	69%
MEETING CUSTOMERS DEMAND AND EXPECTATIONS	68%
FUEL	64%
COMPETITIVE PRESSURE	64%
INCREASED REGULATORY REQUIREMENTS	64%
INCREASE COMPLEXITY OF SERVICE OFFERINGS	57%
INSURANCE COSTS	56%
NOT ENOUGH QUALITY DRIVERS/TECHNICIANS	54%
LABOUR COSTS	51%

AI-powered route optimisation

AI-POWERED ROUTE OPTIMISATION GETS TANGIBLE RESULTS:

- 67% OF FLEETS IMPROVED THEIR LAST-MILE OPERATIONS
- 74% OF FLEETS IMPROVED ON-TIME DELIVERY RATES
- 53% OF FLEETS REDUCED THEIR FUEL COSTS
- 48% OF FLEETS REDUCED THEIR CO_2 EMISSIONS

Photo: Lisbon, Portugal

AI spotlight: how AI-powered route optimisation improves your last-mile operations?

The last-mile revolution: AI-driven orchestration in Europe

In the 2026 European logistics landscape, AI-powered route optimisation has redefined the "connected fleet pulse" by transitioning from static, historical scheduling to dynamic, near real-time orchestration. By leveraging machine learning to analyse live traffic congestion, weather-related delays, and precise delivery windows, AI effectively neutralises the unbillable latency that traditional routing often overlooks.

For European enterprises navigating high-density urban zones and strict emissions regulations, this means a total collapse of the "last-mile bottleneck."

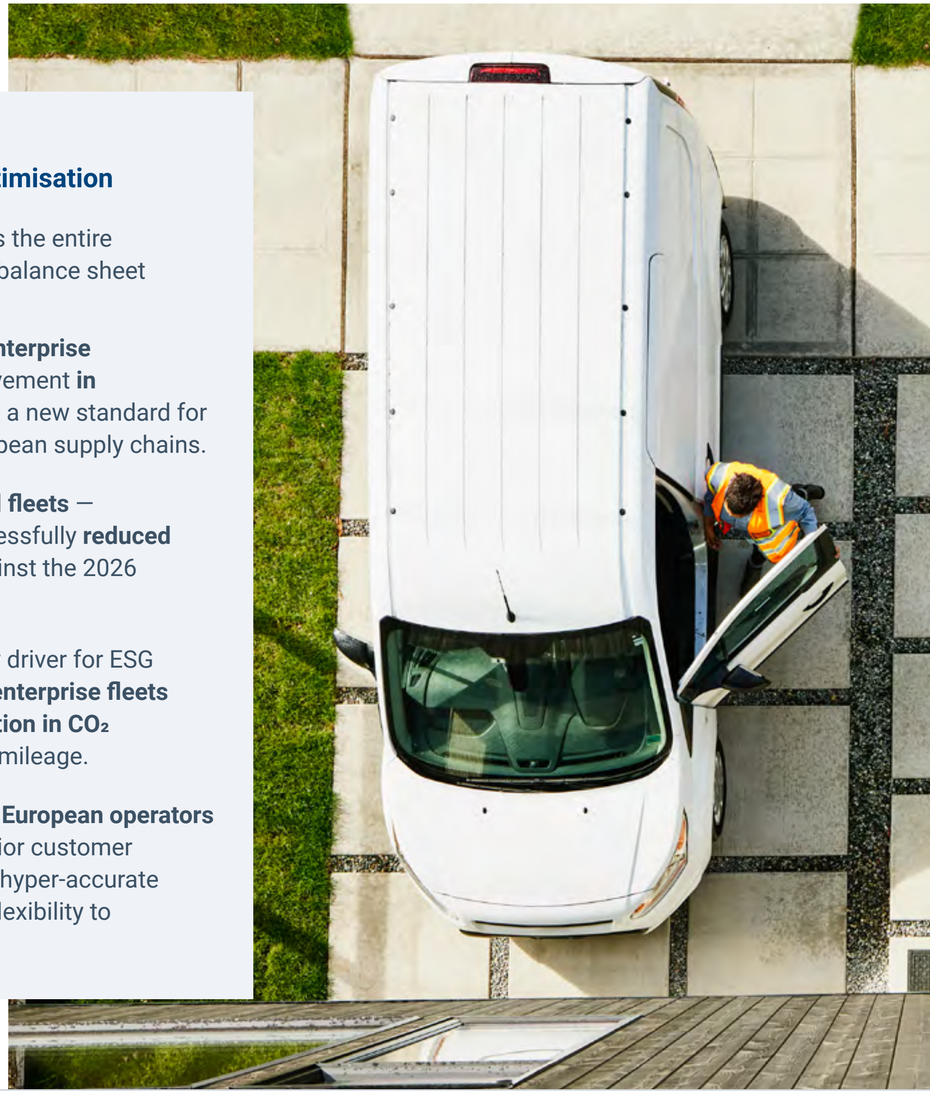
Beyond simple transit mechanics, AI is the primary engine for service excellence and sustainability. By ensuring every driver follows the most intelligent path, businesses are maximising the yield of their human and vehicle capital while extending asset lifecycles through reduced "stop-start" wear. This technical command transforms the last mile from a cost-heavy necessity into a streamlined, high-performance asset that drives both brand loyalty and bottom-line profitability.

KEY TAKEAWAYS

The strategic gains of AI optimisation

The impact of AI extends across the entire operational spectrum, from the balance sheet to the environment:

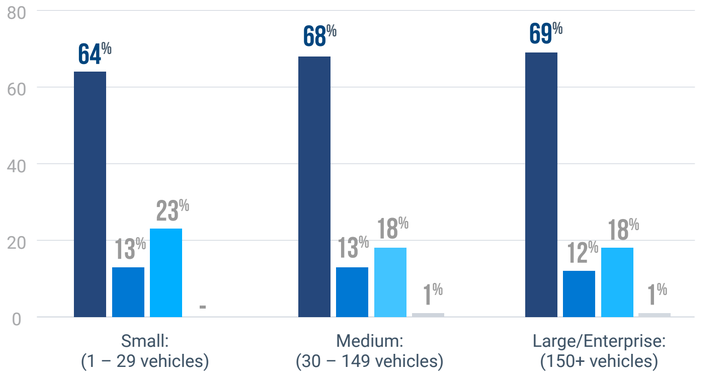
- **Precision reliability: 75% of enterprise fleets** reported a direct improvement **in on-time delivery rates**, setting a new standard for reliability in "just-in-time" European supply chains.
- **Fiscal cooling:** Over **50% of all fleets** — regardless of size—have successfully **reduced fuel costs**, a vital defense against the 2026 energy price spikes.
- **The green corridor:** AI is a key driver for ESG goals, with **64% of small and enterprise fleets** reporting a measurable **reduction in CO_2 emissions** through optimised mileage.
- **Customer experience: 64% of European operators** have used AI to achieve superior customer experience scores, leveraging hyper-accurate ETAs and "on-the-fly" service flexibility to maintain a competitive edge.



Let's dive into how **AI-powered route optimisation improves last-mile operations:**

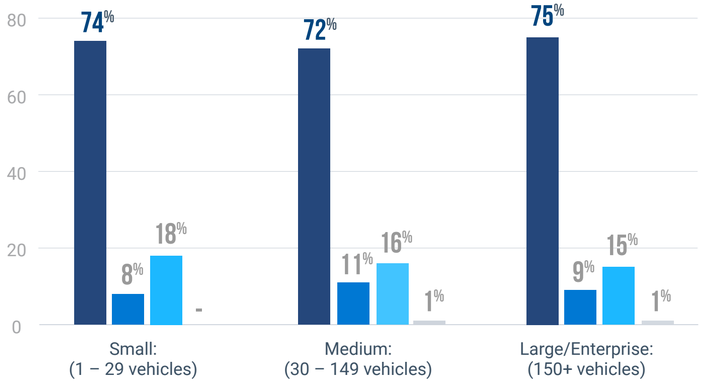
Reduce last-mile delivery time

Does AI-powered route optimisation reduce last-mile delivery time?



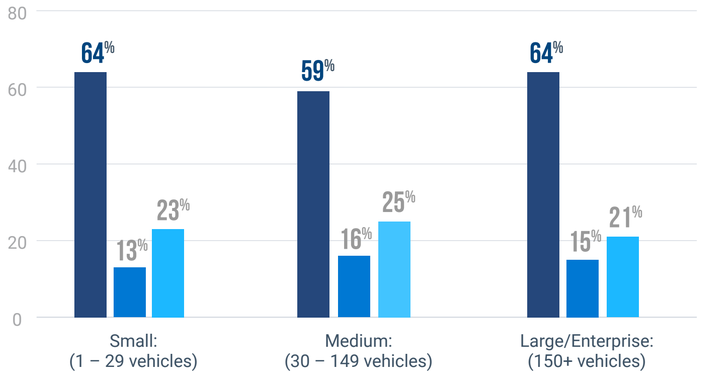
Improve on-time delivery rates

Does AI-powered route optimisation improve on-time delivery rates?



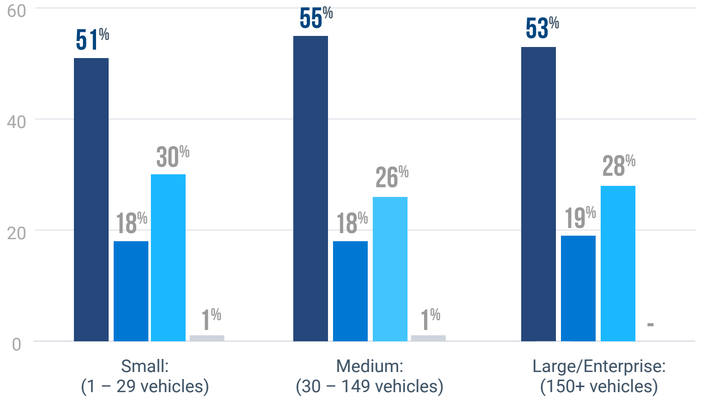
Reduce CO_2 emissions

Does AI-powered route optimisation reduce CO_2 emissions?



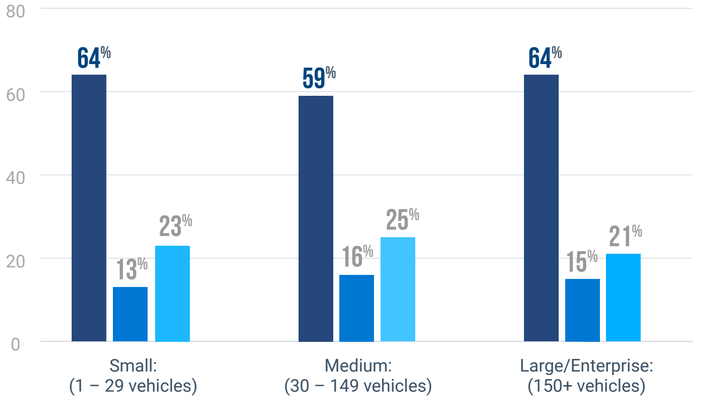
Reduce fuel costs

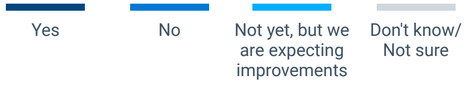
Does AI-powered route optimisation reduce fuel costs?



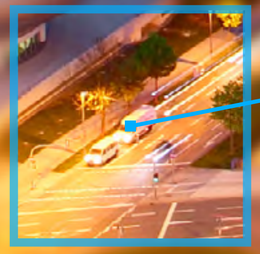
Improved customer experience

Does AI-powered route optimisation improve your customer experience?





Fleet intelligence in action



GOALS ACHIEVED BY USING ADVANCED FLEET MANAGEMENT SOLUTIONS:

67%	OF FLEETS IMPROVED PRODUCTIVITY
62%	IMPROVED COMPLIANCE
58%	DECREASED FUEL CONSUMPTION
54%	IMPROVED CUSTOMER SERVICE

Photo: Munich, Germany

Conclusion

In the current European economic climate, staying competitive is no longer about the size of a fleet, but the intelligence behind its movement. To maintain market share while the economy runs at its sustainable "speed limit," businesses must transition from reactive management to a state of constant, data-driven orchestration.

True market leaders are those who treat operational transparency as a shield against inflation, using deep visibility into every asset to neutralise the silent drain of inefficient routing and idling. By refining the "connected fleet pulse" of their daily operations, these organisations are transforming traditionally rigid overheads into agile, high-performance advantages that allow them to exceed customer expectations even as energy and labour costs continue to climb.

Ultimately, competitiveness in 2026 is defined by the ability to turn technical oversight into a strategy of preventative health for the entire enterprise. As the gap between traditional hauling and tech-first logistics widens, the most resilient firms are leveraging integrated intelligence to protect their margins and their people. This shift ensures that every minute on the road and every gear turn contributes directly to the bottom line, allowing forward-thinking businesses to scale with precision while their competitors remain stalled by the complexities of a volatile and high-cost environment.

Methodology of the 2026 Geotab Report

Conducted by ABI Research for Geotab, this comprehensive study was designed to provide a high-fidelity analysis of the adoption and strategic impact of GPS fleet tracking systems and integrated mobile technologies.

This 2026 report is based on quantitative surveys completed by a total of 1,817 fleet managers, executives, and mobile-business professionals. The findings highlight the definitive operational value and fiscal resilience that European enterprises are achieving through targeted investment in connected fleet intelligence.

The data presented in this report covers the period from January 1, 2025 to December 31, 2025, and is based on survey responses from fleet and operations decision-makers across organisations of varying sizes and industries in Europe.

Geotab

A world leader in connected vehicle and asset solutions

Geotab is a global leader in connected vehicle and asset management solutions, with headquarters in Oakville, Ontario and Atlanta, Georgia. Our mission is to make the world safer, more efficient, and sustainable. We leverage advanced data analytics and AI to transform fleet performance and operations, reducing cost and driving efficiency.

Backed by top data scientists and engineers, we serve approximately 100,000 global customers, processing 100 billion data points daily from more than 5 million vehicle subscriptions. Geotab is trusted by Fortune 500 organizations, mid-sized fleets, and the largest public sector fleets in the world, including the US Federal government. Committed to data security and privacy, we hold FIPS 140-3 and FedRAMP authorizations.

Our open platform, ecosystem of outstanding partners, and Geotab Marketplace deliver hundreds of fleet-ready third-party solutions. This year, we're celebrating 25 years of innovation.

Learn more at geotab.com and follow us on LinkedIn or visit Geotab News and Views.

Sources:

(1) www.euronews.com/business/2026/03/26/oecd-cuts-eurozone-growth-forecast-as-energy-prices-surge

(2-3) www.oecd.org/content/dam/oecd/en/publications/reports/2026/03/oecd-economic-outlook-interim-report-march-2026_254a8d56/d4623013-en.pdf

(4) European Commission Weekly Oil Bulletin

(5) ECB Staff Macroeconomic Projections, March 2026

(6) www.oecd.org/content/dam/oecd/en/publications/reports/2026/03/oecd-economic-outlook-interim-report-march-2026_254a8d56/d4623013-en.pdf

(7) https://ec.europa.eu/newsroom/ener/newsletter-archives/view/service/238

Photo: HQ, Oakville, Canada

GEOTAB®

geotab.com