ISUZU TRUCKS

The Future of Trucking

The Way Forward

2024

Acknowledgments.

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Isuzu Australia Limited Future of Trucking Report – Version 1.1 2024 Edition

Isuzu Australia Limited. 66 Foundation Road Truganina Victoria 3029

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1. Introduction

Welcome to the second edition of The Future of Trucking Report – The Way Forward!

Since Isuzu Australia Limited (IAL) published the inaugural Future of Trucking Report (FoT) in 2020, the road transport operating landscape has continued to undergo significant change, both here in Australia and globally.

The pandemic prompted Australian businesses to shift their strategic thinking and approach to doing business. Aside from the seismic health and societal disruptions it inflicted for several years, the pandemic nonetheless drove the Australian road transport industry to seek innovative solutions to unprecedented challenges.

It is through this lens that IAL presents the second instalment of this study – delving into the Australian truck industry to better understand the trends, industry sentiment, evolving technology systems as well as procurement and maintenance requirements.

As Australian truck market leaders for over three decades, IAL is committed to supporting businesses in their paths to a more sustainable and successful future.

The Future of Trucking Report highlights key findings from more than 1,300 road transport survey respondents, with the results offering a unique insight into the state of the industry.

The Aim

The main goal of this ongoing research project is to arm and assist strategic thinking and decision making within our industry. Key insights from the research have been separated into the following sections of the report:

- Business Sentiment
- Procurement
- Safety & Technology
- Electric Vehicles
- Truck Maintenance

Following on from the last report in 2020, the findings suggest a number of emerging and entrenched trends within the truck industry – indeed identifying and monitoring these trends was another important goal of this year's report and those into the future.

In addition, throughout the report, further commentary from Isuzu's Industry Experts provide further insights and perspective to key trends dominating the industry landscape.

2. Key Insights

Business Sentiment

- The Australian truck industry is expected to continue changing over the next 3 years, responding to new technology, regulations and operator requirements.
- Tighter profit margins and the cost of fuel are the top business and truck fleet challenges facing Australian transport operators.
- Increases to the national freight task remains strong, however growth expectations are a little bearish from previous findings.

Procurement

- Across the Australian truck parc, the average tenure of new truck ownership remains at 6 years.
- Businesses have increased their purchase preference for OEM pre–built trucks as an alternative to custom built trucks.
- The evaluation of new truck total cost of ownership continues to be the primary driver of purchase over initial upfront pricing – this approach has increased since the previous findings.

Safety & Technology

- Increasing safety was the number one reason for adopting new truck technology. In the next 1 – 5 years, Lane Keep Assist, Blind Spot Monitoring and Electronic Stability Control are key safety technologies business are looking to adopt.
- Active (autonomous) safety features available in new model trucks are more widely adopted by larger fleets and Government operators.
- Ongoing focus and adoption of telematics systems across businesses to help increase operational efficiency.

Electric Vehicles

- Australian operators have indicated a strong appetite for the adoption of zero–emission vehicles for their fleets, however the timescale for this introduction remains mixed.
- Perceptions continue to improve about the current suitability of electric trucks and supporting charging infrastructure.
- Electric vehicles were noted as a key part of Australia's transport future in the next 10 –15 years.

Truck Maintenance

- Industry awareness and action on Chain of Responsibility compliance remains unchanged from the previous report – 3 out of 10 operators continue to be unaware of CoR or haven't started policies to comply.
- Businesses indicated a preference for completing major truck repairs at OEM Dealership workshops – citing workmanship, timeliness or service, and availability of parts as key factors.
- Businesses also noted OEM parts and componentry in truck servicing was the preference, with CoR compliance and vehicle uptime key considerations in this preference.

Conclusion

By expanding the scope of this report, whilst retaining some indicators that allow for trends to emerge, we have the beginnings of the story of our industry – pre and post pandemic.

With such change upon us at a critical juncture in the history of our industry, this second instalment of The Future of Trucking Report is both timely and valuable for all stakeholders.

In such a dynamic and essential industry, there will always be a multitude of challenges and the findings of this report paint the picture of a sector that's willing to tough out the harder times and continue to work towards innovative solutions to new problems.

Further, we can see an appetite for a more sustainable future for the next generation and a willingness to push for it in the way the industry does business.

Evidently, the Australian road transport sector is also a strong one, with the findings highlighting an innate resilience in the face of unprecedented adversity and disruption.

Be it regulatory, societal or technological, another key theme emerging from this and previous reports, is the notion that change within our sector is as constant as it is ongoing.

Indeed, changes to powertrain technology and the push towards decarbonisation are arguably affecting the greatest single change to our industry in its history.

To that end, the imminent proliferation of battery electric and related reduced emission truck technology is poised to disrupt traditional modes of operation.

In tandem and keeping pace with this rate of change are the substantial leaps forward in the safety space too, with a future road transport scene looking like a far brighter and more attractive place for both drivers and other road users alike.

From a buyer behaviour perspective, the data continues to add weight to the notion of a society seeking faster, more responsive and in some cases, a form of instant gratification when it comes to applying solutions to problems.

A procurement trend of Ready–to–Work, turnkey trucks continues to enjoy an upward trajectory, with more and more businesses seeking to fit these highly interchangeable model types into their operations, especially with more variants becoming available and at competitive sticker prices.

Finally, and via a 'bigger picture' lens, the data presented shows significant positivity about the overall position of the road transport sector and its future trajectory.

There's no mistaking the critical importance of the Australian road transport industry to the workings of this great land we call home.

3. Isuzu Australia Limited

Isuzu Australia Limited (IAL) is the wholly owned subsidiary of Isuzu Motors Limited (Japan).

With its headquarters based in Melbourne, IAL is responsible for the supply and aftersales care of Isuzu trucks and power solutions product throughout Australia.

Isuzu Trucks has one of the largest and most widely recognised commercial vehicle brands in Australia with a network of over 70 highly professional dealer and authorised service provider locations spread across the country.

At the conclusion of 2023, the Isuzu Trucks brand celebrated 35 consecutive years as the Australian truck market leader.

4. About The Future of Trucking Report

The Future of Trucking Report is the largest and most comprehensive report of its kind in the Australian truck industry.

The report examines and identifies key insights influencing businesses in the coming years.

The report presents survey data collected from over 1,300 Australian stakeholders across the trucking and road transport sector.

Respondents hailed from a broad mix of industries and fleet sizes, including construction, manufacturing, retail trade, wholesale trade, mining as well as the utilities sector.

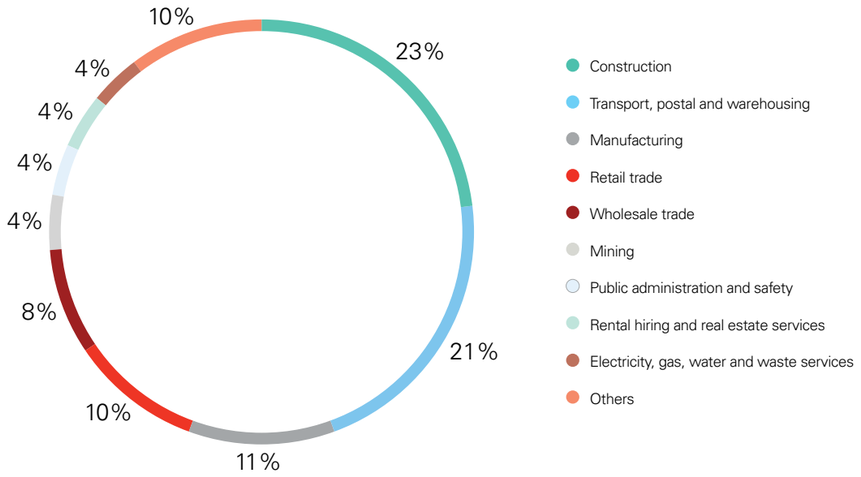
Geographically, respondents were located across the country with every state and territory having representation in the collated data.

Survey work informing this report was conducted in mid–2023, with subsequent, follow–up data analysis work conducted towards the conclusion of 2023.

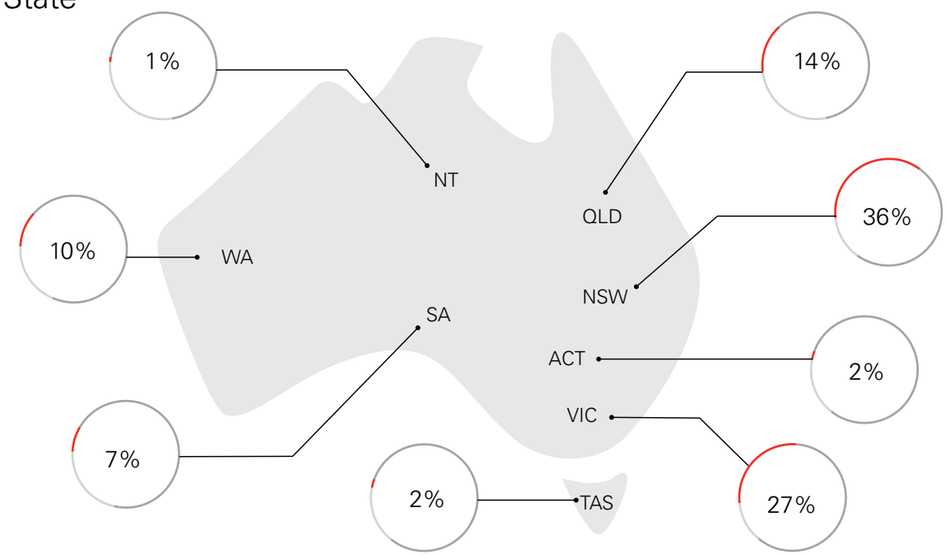
Total Survey Respondents

1,300

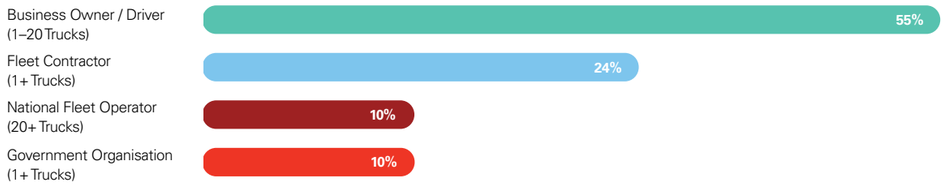
Industry



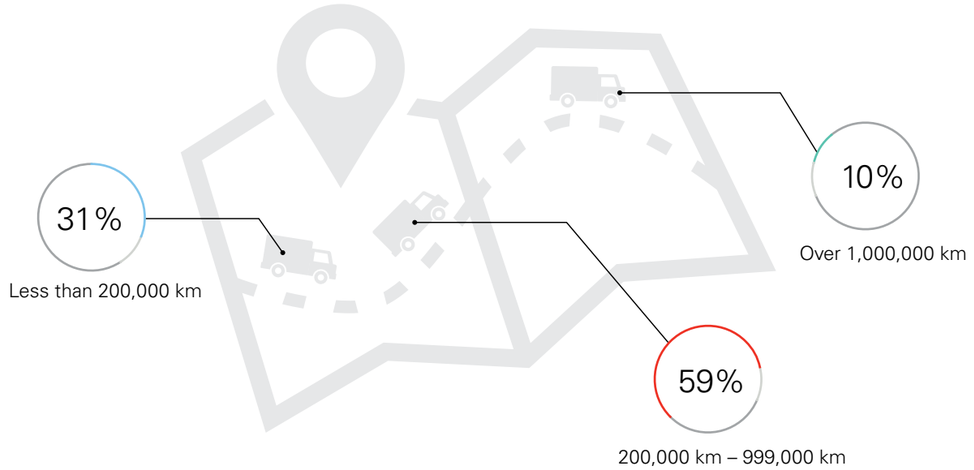
State



Business / Respondent Type



Total Distance Travelled Per Year



Truck GVM

Business Sentiment

1. Business Sentiment Overview
2. Key Takeaways
3. Industry Expert Insight
4. Insight Charts

1. Business Sentiment Overview

Despite facing a range of challenges over the last four years, the Australian road transport and related industries have performed extremely well as a collective.

A noteworthy metric which leads this section of the report, is industry change perceptions over time and levels of confidence in the sector's abilities to respond.

Industry Change

In a distinct change from the 2020, 50 per cent of all businesses surveyed believe that their industry will change and evolve rapidly over the coming three years.

This level of uncertainty represents a significant increase from the previous report, where only a third of businesses felt that the pace of industry change was of foremost concern.

When broken down into industry type, this sentiment is most strongly felt by those in construction (55 per cent), transport, postal and warehousing (57 per cent) and the mining sector (66 per cent).

At the other end of the scale, the rapid industry change sentiment was felt least by those in public administration at 22 per cent.

Approach to Industry Change

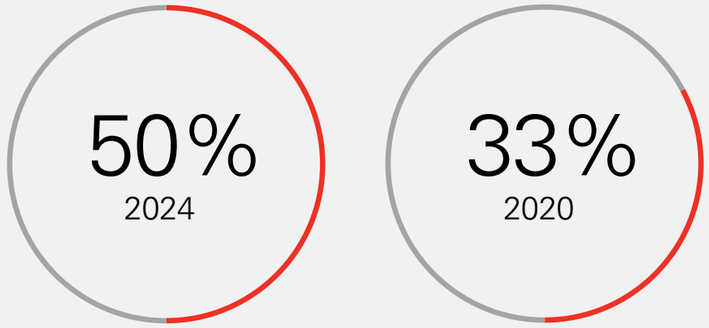
Worryingly, only 37 per cent of all businesses and the industries they operate in – have a clear and comprehensive plan for the future. However, this figure is an increase from how businesses felt at the beginning of 2020, with only 30 per cent at the time feeling fully ready with a clear and comprehensive plan.

37%

of businesses have a **clear and comprehensive plan for the future**, an increase from how businesses felt at the beginning of 2020

Industry Change – Next 3 Years

Level of rapid industry change as indicated by Future of Trucking respondents from 2024 vs 2020



Key Business Challenges

Research found that increasingly tighter profit margins, access to quality employees and rising competition levels were the key challenges businesses must grapple with.

These key business challenges remain very consistent from 2020.

Key Fleet Challenges

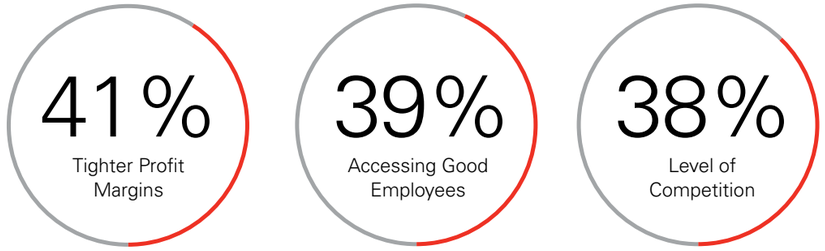
Drilling further into some of the pressing issues facing Australian truck fleet operators, the report isolates some of the more crucial truck fleet challenges and to what extent this has changed over time.

The findings paint a very similar picture to the last time the report ran, indicating some persistent challenges that are longstanding within the industry.

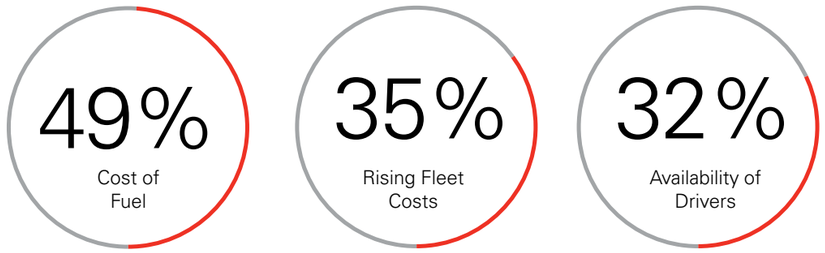
All business sizes and all industries (except for the utilities and waste sectors), nominated the cost of fuel as the most pressing fleet issue they face. Rising fleet costs and availability of drivers ranked second and third respectively.

Signalling an appetite for change perhaps, respondents also agreed on the most common strategy for overcoming this issue – that being the purchase of more fuel–efficient trucks. This was also the case in the 2020 report.

Key Business Challenges



Key Fleet Challenges



Freight Task

As Australia's population continues to increase, our national freight task also continues to grow. The latest findings indicate that business expectations are a little less bullish from previous results, however strong anticipated growth remains.

Overall, 44 per cent of businesses expect their volume of freight to increase over the coming 24 months, 24 per cent indicated it would remain the same and 33 per cent anticipated a decrease in overall demand for freight movement.

The exception to that rule however are national fleet operators, who facilitate a larger portion of freight management across Australia. 55 per cent expected an increase in the volume of freight back in 2020, that figure has now climbed to 63 per cent.

Furthermore, 29 per cent of this cohort indicated that the freight task would increase by more than 10 per cent, and a further 8 per cent anticipated increases of 25 to 50 per cent.

Business expectations of freight task in the next 24 months

	35% Decrease	21% Stay the Same	44% Increase
Owner Driver	32%	24%	44%
Fleet Contractor	41%	20%	39%
National Fleet	15%	21%	63%
Government	27%	35%	38%

2. Key Takeaways

- Industry expected to evolve rapidly in the coming three years.
- Tighter profit margins and cost of fuel are key business and truck fleet challenges.
- Strong increases in freight task expectations for national fleet operators.

3. Industry Expert Insight

Ben Lasry

Chief of Sales & Aftersales, Isuzu Australia Limited

Ben Lasry has spent his entire career of over 25 years in the automotive industry building strong relationships and a broad skill base.

Ben has developed an impressive resume having worked in a range of key roles for GM Holden, plus stints with the Walkinshaw Automotive Group and at PrixCar Services.

Joining Isuzu Australia Limited in 2020, Ben has executive responsibility for the overall performance and operation of the Sales, Aftersales and Network Development teams supporting the Isuzu Network of Dealers and Authorised outlets and customers.

If the current state of Australia's road transport industry and related sectors could be distilled down into one descriptor, I'd have to opt for the word 'change.'

Perhaps like never before, the road transport sector is evolving apace and across several different fronts. This is evidenced in some of the sentiment unearthed in this latest Future of Trucking Report from Isuzu Trucks.

Whether you perceive change to be a negative or a positive is of course subjective, however there's no denying it's upon us.

When it comes to applying some analysis to this subject, timing is everything and in very broad terms, the Australian economy has evolved, more or less, as it was expected to in a post pandemic world. GDP growth has slowed, labour market conditions have eased a little and headline inflation has fallen from its peak.

Drilling into our industry sector more specifically, the theme of change rears its head once again. Be it regulatory such as the federal government's recent increase in the overall width limit for new trucks with specified safety features, changing buyer behaviours or the rapid pace of development on the technology front – reaction to the fast–paced evolution of the road transport industry in this report is indeed noteworthy.

One constant we can bank on in the transport sector is the persistent challenges faced by businesses large and small. The rise in the price of fuel – and the global forces dictating it – are of course a key one and of significant concern to the majority in the sector.

As our report highlights, freight costs and diminishing margins are another set of factors that are understandably high on the list of concerns for operators across the country, and for good reason.

So how then are these challenges being met?

The data reveals a changing buyer behaviour trend that is providing the solution to a number of these challenges – that being the purchase of more efficient, safer new trucks and even more of this group are looking at a turnkey, ready-to-work solution to really optimise business efficiency.

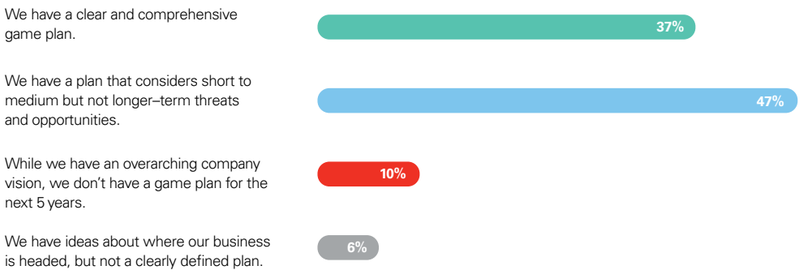
This is an understandable course of action for many businesses shouldering the weight of the Australian freight task, which continues growing. A sizeable 63 per cent of those hailing from national freight fleets around the country expect the freight task to continue its upward trajectory of demand.

What we've found in this report however, is that many in our sector are well prepared and have a gameplan in place for the period ahead of us.

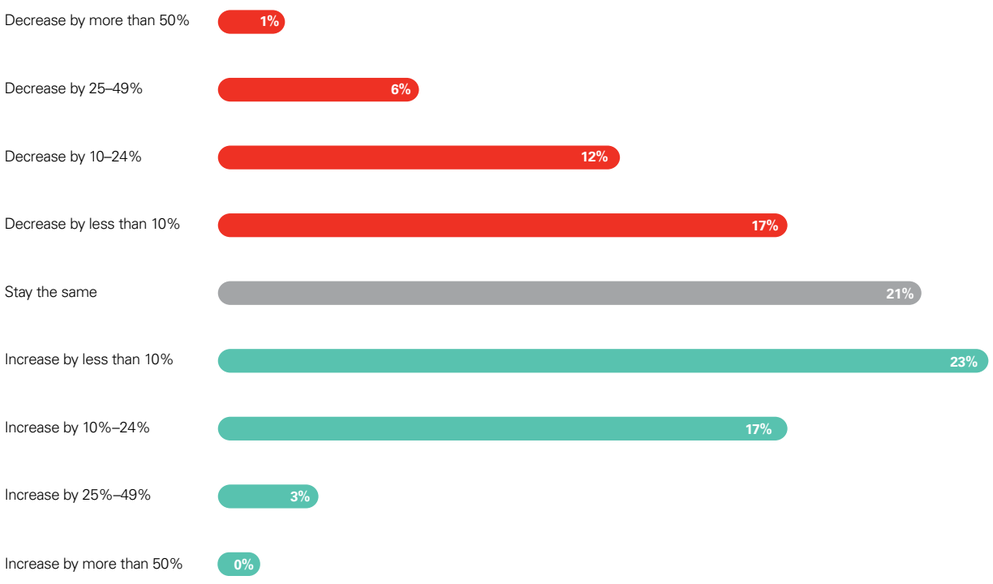
As the saying goes, 'change is the only constant' in life and in business, so whatever the challenges may be, (and there's a few to grapple with here), we can and we should be extremely confident in the state of the Australian road transport sector.

4. Insight Charts

Approach to Industry Change



Change % in Freight Task Volume



Top 10 Business Challenges by Industry

First Second Third

	Overall	Construction	Electricity, Gas, Water & Waste Services	Manufacturing	Mining	Public Admin & Safety	Rental Hiring & Real Estate	Retail Trade	Transport, Postal & Warehousing	Wholesale Trade	Other
Tight profit margins	41%	38%	43%	43%	30%	37%	36%	50%	43%	35%	40%
Accessing good employees	39%	42%	48%	33%	40%	39%	39%	40%	35%	34%	46%
Level of competition	38%	40%	38%	42%	28%	28%	39%	41%	38%	36%	35%
Managing business cashflow	33%	34%	38%	36%	30%	28%	25%	33%	34%	36%	29%
Government regulation	32%	32%	40%	31%	30%	41%	27%	21%	31%	28%	43%
Declining consumer spending	29%	26%	18%	34%	22%	20%	39%	36%	28%	38%	26%
Accessing capital for growth	28%	27%	28%	32%	36%	22%	23%	25%	32%	25%	28%
Falling demand for our products / services	27%	24%	25%	34%	22%	22%	20%	28%	30%	33%	17%
Declining business confidence	21%	23%	33%	23%	18%	20%	14%	23%	22%	18%	18%
Housing market decline	19%	25%	18%	19%	8%	28%	18%	23%	18%	15%	6%

Top 10 Fleet Challenges by Industry

First Second Third

	All%	Construction	Electricity, Gas, Water & Waste Services	Manufacturing	Mining	Public Admin & Safety	Rental Hiring & Real Estate	Retail Trade	Transport, Postal & Warehousing	Wholesale Trade	Other
Cost of fuel	49%	46%	45%	45%	42%	52%	52%	53%	44%	58%	62%
Rising fleet costs	35%	29%	40%	33%	30%	30%	48%	41%	33%	39%	42%
Availability of drivers	32%	30%	38%	24%	22%	26%	30%	33%	39%	30%	38%
Ensuring a safe working environment	28%	28%	50%	32%	26%	24%	23%	20%	30%	24%	31%
Ensuring driver & other road user safety	27%	27%	40%	24%	28%	19%	18%	25%	30%	26%	32%
Fleet renewal / Ageing fleet	26%	25%	35%	24%	28%	22%	27%	25%	29%	25%	27%
Keeping track of truck maintenance schedules	25%	24%	23%	33%	18%	28%	27%	26%	24%	26%	23%
Availability of skilled non–driving staff	25%	25%	33%	25%	32%	22%	25%	29%	22%	21%	26%
Managing driver fatigue	24%	25%	30%	26%	26%	17%	11%	26%	26%	29%	14%
Controlling the total truck ownership costs	24%	29%	28%	23%	24%	11%	16%	25%	24%	21%	26%

Procurement

1. Procurement Overview
2. Key Takeaways
3. Industry Expert Insight
4. Insight Charts

1. Procurement Overview

As has been the case for some time, the decision making of operators when it comes to procurement continues to change and evolve alongside market and regulatory pressures.

Intrinsically linked to the labour pool and retention of quality employees, Australian businesses are continuing to purchase capital equipment that efficiently suits the application at hand, and secondly, provides ease of use and accessibility for employees.

For some sections of the industry, another key purchasing motivator is the environment and the continuing push towards realising a zero-emission motoring future.

Considerations around the age of vehicles, build and payment preferences are also significant factors in procurement decision–making as the data reflects.

Age of Fleet

In terms of tenure of equipment, the data shows us that operators hold onto their trucks for an overall average of around six years before replacement.

For larger fleets the average figure was slightly higher, while compared to the previous report, the average replacement age of heavy–duty and prime mover trucks has reduced by around one year for both classes, to 7.2 years.

As industry sales volumes indicate, there's certainly additional trucks at work on Australian roads in recent years, although their tenure in the truck parc remains mostly unchanged from 2020.

6.2

years is the **average age of a new truck replacement**. For larger fleets the average figure was slightly higher at 7.2 years

Pre–built v Custom Built Truck Preference

As was the case with preceding FoT findings, continued consumer demand for improved efficiencies in freight (regardless of the end use), means the shift towards pre–built, fuel–efficient trucks continues.

71 per cent of respondents indicated that purchasing a pre-built ready-to-work truck was the preference, an increase from 65 per cent in 2020.

However, due to new truck availability, just under half of all those surveyed expected to purchase pre-built trucks in the next two years, compared to custom built or used trucks.

The intention to purchase pre-built trucks was true for all industry sectors except for those in the transport, postal and warehousing subgroup, where demand for both new pre-built and customised trucks is equal.

New customised trucks are a particular interest for the national fleet operator group running 20 or more trucks, with half preferring customised builds and 36 per cent looking to purchase pre–built trucks. This was a similar break–up to that found in the 2020 report.

Procurement Preference

In the past two years, over half of businesses have purchased trucks using lease arrangements, and cite the financial benefits including lower up–front costs, better negotiating position and freeing up of capital for other business uses as key drivers for this behaviour.

Overall, the top reason for vehicle replacement is sparked at the point when trucks become too expensive to maintain, with 38 per cent citing this expense as the single biggest driver.

This maintenance related trigger grows to 41 per cent in the fleet contractor sub–group, who are more acutely affected due to the volume of vehicles in constant uptime.

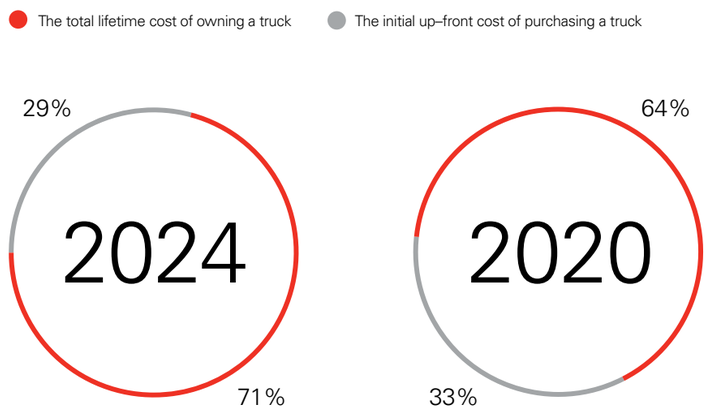
Cost Assessment Preference

Since 2020 we see fleets placing an even greater emphasis on the total cost of ownership (TCO) within their vehicle planning and purchasing decisions.

The importance placed on this key consideration has increased by 7 per cent to a total of 71 per cent of fleets surveyed citing TCO as more important that the sticker price of a vehicle.

The TCO approach is widely regarded as providing a more complete purchasing, maintenance, and operational cost view of a vehicle purchase, helping to establish business efficiencies, especially in larger fleet operations.

Cost Assessment Preference



2. Key Takeaways

- Average tenure of new truck ownership remains at 6 years.
- Preference for pre–built vehicles has increased.
- Total cost of ownership awareness and preference continues to grow.

3. Industry Expert Insight

Craig White

Head of Sales, Isuzu Australia Limited

Backed by a successful career in passenger and commercial automotive sales, including key roles at Michelin Australia and Mitsubishi Motors Australia, Craig first joined Isuzu Australia Limited as Zones Sales Manager for South and Western Australia in 2017, before taking on the role of National Dealer Sales Manager in 2020.

Ascending to Head of Sales in 2023, Craig utilises his strong bonds with the Isuzu Dealer Network and his broad industry experience to develop and manage the sales functions and strategy for both Isuzu Trucks and Isuzu Power Solutions brands.

A few things come to the fore when analysing the changing nature of Australian truck buyer behaviour and the forces that influence it.

As we pick up developing trends throughout this ongoing research project, we can uncover the type of demand in the market and what are current 'best practice' approaches to satisfy it.

Despite the climate of immense change across our sector, we note however that some things remain unmoved.

Interestingly, the tenure of our truck parc, (across all segments), remains fairly static, with trucks working for an overall average of around six years before replacement options are considered.

For majority of fleets, and indeed many smaller operators, the ongoing maintenance, fuel and repair costs, (total cost of ownership), are huge factors in their procurement decision-making.

Afterall, trucks are a working tool of trade – a means to an end.

For some time now we've seen the meteoric rise in popularity of turnkey, pre-bodied, ready-to-work trucks as a legitimate solution for a growing number of operators in varied applications across our industries.

Again, this is a trend we can see developing, with the curve continuing to track upwards. It's easy to see why.

There's a compelling argument for the smart application of turnkey products into established business models. The the essential point is ensuring that operations adapt to take advantage of their inherent advantages and efficiencies.

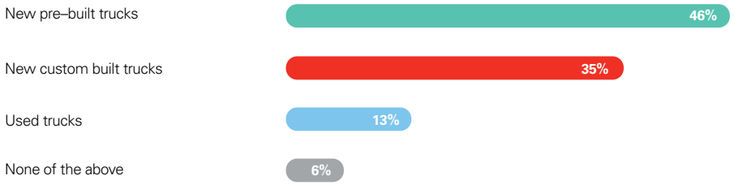
The single biggest driver of buyer behaviour in the Australian truck parc is maintenance cost. Whilst unsurprising in many respects, this result does nonetheless pose the subsequent question of exactly which direction buyer behaviour will take – especially as we move headlong into an era of new powertrain technology.

One thing is for certain, our most recent data paints the picture of an extremely smart, business savvy Australian truck buyer who is looking for a transport partner, not just a retailer of goods.

The challenge remains then for customers to balance the most cost effective and efficient solution, backed by the right ongoing support.

4. Insight Charts

Truck Purchase in the Next 2 Years



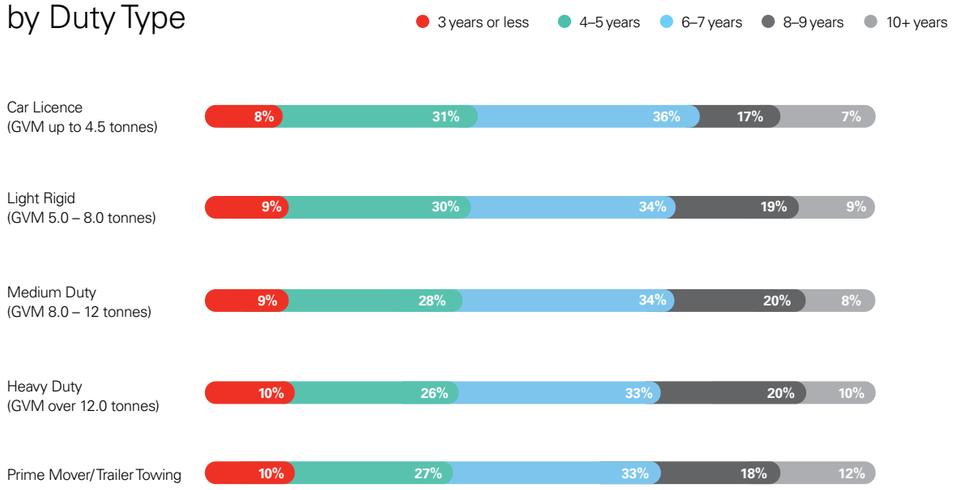
Truck Purchase in the Next 2 Years by Business Type

	Business Owner/Driver	Fleet Contractor	Government Organisation	National Fleet Operator
New pre–built trucks	47%	47%	45%	36%
New custom built trucks	33%	36%	35%	50%
Used trucks	12%	12%	14%	10%

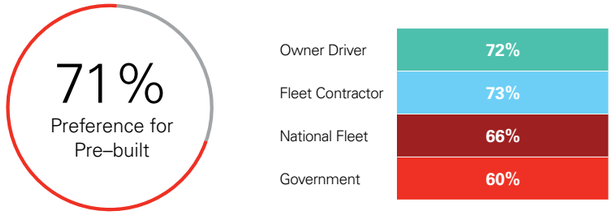
Truck Purchase in the Next 2 Years by Industry

	Construction	Transport, Postal & Warehousing	Manufacturing	Retail Trade	Wholesale Trade	Rental Hiring & Real Estate	Electricity, Gas, Water & Waste Services	Other
New pre–built trucks	51%	43%	46%	44%	48%	48%	43%	41%
New custom built trucks	29%	43%	37%	29%	33%	38%	35%	37%
Used trucks	12%	9%	12%	24%	17%	13%	18%	11%

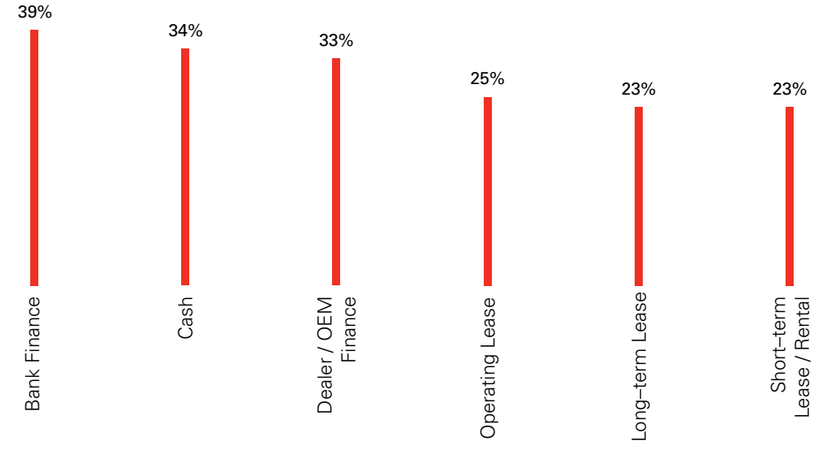
Age of New Truck Fleet by Duty Type



Pre–Built v Custom Built Truck Preference



Purchase Type for New Trucks – Past 2 Years



Safety & Technology

1. Safety & Technology Overview
2. Key Takeaways
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1. Safety & Technology Overview

The Future of Trucking findings indicate that all fleets are continuing to adopt technology that leads to a safer environment for both drivers and other road users alike.

Safety features continue to be a headline purchase consideration for many business types. This is fuelled by further regulatory compliance obligations such as Chain of Responsibility (CoR).

As was the case in the previous report, these new safety and technology features are more widely prioritised by businesses with larger fleets, which given the scale this cohort operates in, understandably has a higher uptake across all major safety technology indicators mentioned.

Truck safety and the emerging technology that assists in delivering it continue to be intertwined, as the findings show an increased number of those surveyed believe technology to be extremely helpful in increasing safety, since the last report was published.

Active Safety Feature Adoption

Active safety features, which are classified as pre–collision safety systems continue to be in high demand, with some being 'non–negotiable' for larger transport fleets with multiple trucks.

Features such as Adaptive Cruise Control (44 per cent), Autonomous Emergency Braking (43 per cent), Blind Spot Monitoring (41 per cent) and Electronic Stability Control (41 per cent) are respectively the most essential active features currently serving truck operators in Australia.

Alongside these key systems, the larger fleet subgroup also nominated Lane Departure Warning (51 per cent) as a feature they presently employ.

A combination of sensor based, driver aid technologies, including Lane Keep Assist, Blind Spot Monitoring and Electronic Stability Control (ESC) equally toped the list (52 per cent) for new safety technology that businesses were considering in the coming 1–5 years.

ESC in particularly will be a major focus for operators as the feature has been progressively mandated under the Australian Design Rules. Implementation began with new model light goods vehicles from July 2019 and from February 2025 it will be mandated for all current and new model medium and heavy goods vehicles as well.

Top 3 Active Safety Features Currently Used

44%	43%	41%
1. Adaptive Cruise Control	2. Autonomous Emergency Braking	3. Blind Spot Monitoring Electronic Stability Control

Top 3 Active Safety Features Being Considered in the Next 1 – 5 Years

52%		
1. Lane Keep Assist	2. Blind Spot Monitoring	3. Electronic Stability Control

Fleet Technology Adoption

The top–three other technologies currently used by fleets are forward and rear facing cameras (51 per cent), driver communication and messaging systems (45 per cent) as well as Telematics systems (40 per cent). These three features continue to be applied across all business types.

Data–backed technology including telematics (55 per cent) and fleet management systems (54 per cent) topped the list of tech systems Australian businesses are considering strongly over the coming 5 years.

Again, these tech priorities have remained consistently in demand since the last FoT report in 2020. The government businesses subgroup shows heighted interest in Telematics for truck performance and predictive maintenance (59 per cent).

Overall interest in technologies features points to businesses wanting to have more visibility over their fleet and efficient, proactive management at all times.

With the average age of Australia's truck parc hovering at around the 13–year mark, the ongoing challenge for transport and transport–reliant businesses will be the requirement to update and maintain the veracity of truck safety and new technology features.

With more advanced, safer capital equipment comes greater efficiencies in numerous areas, including reduced emissions, improved fuel economy and superior overall business efficiencies.

Top 3 Technology Systems Currently Used

- 51% — 1. Forward / Rear Facing Cameras
- 45% — 2. Driver Communication Systems
- 40% — 3. Telematics Vehicle Tracking

Top 3 Technology Features Businesses Considering in Next 1 – 5 Years

- 55% — 1. Telematics Vehicle Performance & Predictive Maintenance
- 54% — 2. Fleet Management Systems
- 53% — 3. Automated Crash Notifications

Telematics Features & Benefits

Insights into vehicle productivity, efficiency and equipment operating parameters are critical to effective and profitable business operations.

Data shows that many fleet businesses have a form of telematics technology installed (40 per cent), with vehicle tracking and truck–specific navigation being the most popular features.

This technology is continuing to be harnessed to varying levels, but the data also indicates an appetite to adopt more proactive telematics features to improve safety and vehicle uptime – noted benefits include improved driver safety (57 per cent), monitoring driver behavior (54 per cent) and increasing efficiency (53 per cent).

Interestingly, the perceived benefits of telematics were found to be application and industry specific – with retail operators looking for efficiency dividends, while more focussed transport operations are seeking fuel efficiency gains.

The scope of connected transport is of course huge and the exchange of data between vehicles and road infrastructure, otherwise known as the 'connected city,' is the longer game at play for majority of the industry.

Top 3 Telematics Benefits

57%	54%	53%
1. Improved Driver Safety	2. Monitoring Driver Behaviour	3. Increasing Efficiency

2. Key Takeaways

- Lane Keep Assist, Blind Spot Monitoring and Electronic Stability Control are key safety technologies business are looking to adopt in the next 1 – 5 years.

- Active safety features are more widely adopted by larger fleets and Government operators.

- Ongoing focus and adoption of telematics systems to help improve fleet safety and vehicle uptime.

3. Industry Expert Insight

Matt Sakhaie

Head of Product, Isuzu Australia Limited

Matt joined Isuzu Australia Limited in 2010 with over 25 years of experience across the Automotive, Power & Energy solutions, and engineering service sectors within Australia and internationally.

Responsible for Isuzu Power Solutions (IPS) Department, Matt stepped up to the role of Head of Product in 2023.

Since then, Matt has championed a combination of systematic and innovative approaches to transform Isuzu Product Department to make the solutions portfolio future proof. He is a member of Engineers Australia and of the Canadian Council of Professional Engineers.

Alongside the rapid pace of change more broadly evident across the automotive space, the world of road transport safety has also undergone a significant ramp–up in recent times.

Thinking back just ten or so years ago, many vehicles were lucky to have traction and cruise control at best, and only the very top specifications in luxury passenger vehicles had anything much beyond that.

What we've seen of late, especially in the truck world, is the proliferation of knowledge and tech sharing at the OE level, making cutting–edge safety technology a more viable proposition for many brands competing in global and domestic markets alike.

While an increasingly diverse range of truck safety technologies have become more readily available (sometimes driven by regulatory change), our research confirms that it's the larger operators – with a keen penchant for compliance – who are more willingly taking–up and applying these safety systems in a meaningful way.

This is of course wonderful news. For so many reasons, the broader industry craves leadership in this area and the safety and compliance example set by these larger fleets is as welcome as it is necessary.

When we look at exactly what systems are being applied by fleets it's a mixture of technology that both assists in improving driver/ road user safety, but also bolsters business efficiencies.

Undeniable though are the links between compliance adherence and the winning of lucrative contracts, especially at the top end of fleet and logistics operations in Australia.

It's any wonder then that the adoption of safety technology is a balancing act between compliance obligations and ensuring people are kept safe (CoR for example), whilst also leaning into systems that help bolster revenue generation and keep people in a job.

This report indicates that alongside a reasonably strong level of adoption of data–driven safety tech and software such as telematics or like-minded 'connected' systems (40 per cent), there also remains a continued strong interest in systems that help support fleet business operations and bolster safety outcomes.

As a modern society we also still have some significant connected milestones to achieve – matching the power and creativity of data–driven software to the static highway infrastructure that ultimately empowers it in a more significant, genuinely 'connected' way.

When it comes to the future of truck safety, this notion of a truly connected vehicle is nonetheless the next horizon in the Australian road transport space.

When you consider how quickly we've arrived at heightened sensor and camera–based systems, one can only imagine the state of the truck safety space over the coming 5–10 years.

4. Insight Charts

Active Safety Features Currently Used by Industry Type

First Second Third

	All%	Construction	Electricity, Gas, Water & Waste Services	Manufacturing	Mining	Public Admin & Safety	Rental Hiring & Real Estate	Retail Trade	Transport, Postal & Warehousing	Wholesale Trade	Other
Adaptive Cruise Control	44%	45%	40%	46%	34%	33%	43%	44%	47%	50%	34%
Autonomous Emergency Braking	43%	41%	35%	46%	30%	35%	48%	45%	52%	38%	39%
Electronic Stability Control	41%	40%	38%	44%	32%	30%	41%	37%	45%	45%	47%
Blind Spot Monitoring	41%	39%	38%	41%	36%	30%	41%	47%	51%	39%	28%
Driver Monitor System	40%	39%	38%	47%	34%	26%	41%	44%	50%	34%	24%
Lane Departure Warning	40%	36%	30%	44%	30%	31%	52%	40%	48%	41%	35%
Lane Keep Assist	38%	39%	35%	38%	36%	22%	41%	44%	44%	31%	32%

Active Safety Features Being Considered in the Next 1 – 5 Years by Industry Type

First Second Third

	All%	Construction	Electricity, Gas, Water & Waste Services	Manufacturing	Mining	Public Admin & Safety	Rental Hiring & Real Estate	Retail Trade	Transport, Postal & Warehousing	Wholesale Trade	Other
Adaptive Cruise Control	49%	50%	55%	57%	48%	52%	52%	50%	48%	42%	48%
Autonomous Emergency Braking	49%	51%	58%	48%	60%	48%	50%	47%	43%	56%	40%
Electronic Stability Control	52%	52%	55%	50%	60%	60%	52%	56%	49%	51%	41%
Blind Spot Monitoring	52%	55%	53%	53%	50%	57%	53%	49%	46%	56%	57%
Driver Monitor System	51%	50%	55%	46%	58%	63%	50%	51%	45%	61%	52%
Lane Departure Warning	50%	54%	61%	48%	58%	55%	43%	52%	47%	52%	41%
Lane Keep Assist	52%	51%	53%	53%	52%	67%	45%	45%	51%	62%	46%

Technology Systems Used by Industry Type

First Second Third

	All%	Construction	Electricity, Gas, Water & Waste Services	Manufacturing	Mining	Public Admin & Safety	Rental Hiring & Real Estate	Retail Trade	Transport, Postal & Warehousing	Wholesale Trade	Other
Forward & Rear Facing Cameras	51%	53%	33%	56%	44%	43%	48%	48%	54%	59%	48%
Driver Communication Systems	45%	41%	43%	41%	38%	31%	43%	53%	54%	47%	34%
Telematics Vehicle Tracking	40%	38%	43%	39%	36%	28%	52%	35%	46%	42%	33%
Telematics Vehicle Performance & Predictive Maintenance	34%	33%	38%	35%	32%	24%	30%	36%	40%	29%	24%
Driver Performance Monitoring	38%	35%	40%	35%	44%	28%	27%	44%	47%	35%	32%
Digital Mirrors	38%	42%	18%	43%	26%	33%	11%	40%	41%	43%	32%
Fleet Management Systems	36%	37%	40%	20%	36%	24%	39%	37%	38%	43%	27%
Automated Crash Notifications	33%	28%	23%	28%	33%	26%	34%	36%	42%	32%	28%

Technology Systems Being Considered in the Next 1 – 5 Years by Industry Type

First Second Third

	All%	Construction	Electricity, Gas, Water & Waste Services	Manufacturing	Mining	Public Admin & Safety	Rental Hiring & Real Estate	Retail Trade	Transport, Postal & Warehousing	Wholesale Trade	Other
Forward & Rear Facing Cameras	45%	45%	63%	42%	52%	52%	55%	50%	44%	40%	41%
Driver Communication Systems	47%	49%	51%	52%	50%	59%	42%	44%	41%	51%	44%
Telematics Vehicle Tracking	50%	51%	45%	56%	52%	61%	41%	61%	47%	47%	41%
Telematics Vehicle Performance & Predictive Maintenance	55%	52%	50%	58%	54%	59%	57%	56%	51%	58%	54%
Driver Performance Monitoring	52%	52%	48%	61%	48%	54%	56%	51%	47%	60%	43%
Digital Mirrors	51%	48%	65%	48%	56%	52%	65%	55%	51%	48%	44%
Fleet Management Systems	54%	49%	45%	54%	62%	57%	46%	58%	57%	49%	48%
Automated Crash Notifications	53%	59%	66%	54%	56%	55%	45%	56%	57%	56%	43%

Electric Vehicles

1. Electric Vehicles Overview
2. Key Takeaways
3. Industry Expert Insight
4. Insight Charts

1. Electric Vehicles Overview

Whilst arguably slow out of the blocks, Australia has nonetheless begun its steady transition away from combustible energy sources and is making initial strides towards a carbon neutral future across a range of industries.

Reading into this broader transition, this report seeks to canvas operator appetite for zero tailpipe emissions (zero emissions) future as well as perceptions, positive or otherwise, around the use of commercial electric vehicles (EV) in the Australian market.

The latest findings provide solid insight into the thought process of business operators when it comes to this emerging technology within the Australian market.

The final form that this technology takes continues to evolve, however, as the findings indicate, the product deployed must be directly relevant to the operating needs, infrastructure, and regulations for customers in their given markets.

Zero Emission Strategies

Encouragingly, here in Australia 91 per cent of businesses surveyed in the The Future of Trucking Report are considering adopting some form of zero–emission strategy for their vehicle fleet.

Of those considering, 10 per cent were actively considering now, 40 per cent indicated this would commence within 2 years and a further 41 per cent noted this would be within 10 years.

Adoption of Zero Emissions Strategy for Vehicle Fleet

Whilst only a small percentage of businesses across all industry sectors are considering implementing a zero–emission strategy right now, the medium– and longer–term outlook points to a collective desire to support a move towards a net zero future.

The absence to date of any clear Australian legislative / regulatory incentives or broad national charging infrastructure investment, could explain the collective lack of urgency in this space. The overall sentiment towards reducing emissions, however, remains extremely positive.

Electric Vehicle Adoption

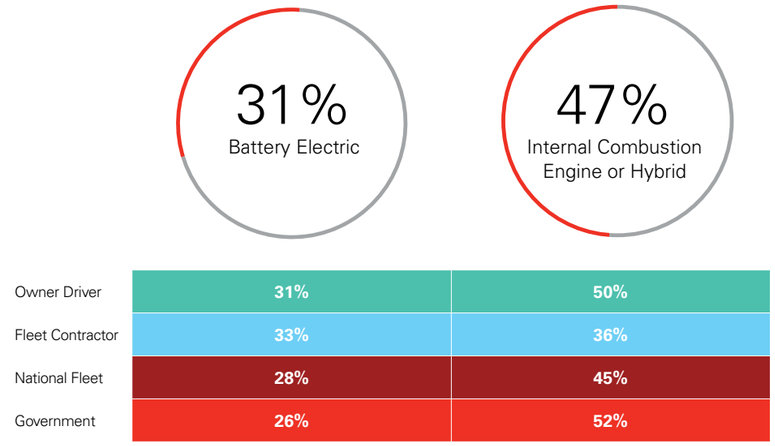
The arrival of commercial electric vehicles to Australian has commenced. With the cost of fuel being the number one challenge for business fleets, businesses are expressing a keen appetite for new electric technology to help create operational savings across their fleet.

31 per cent of all businesses indicated that electric trucks would be a primary solution for their vehicle fleet in the next 10–15 years.

In terms of industries looking towards an electric vehicle future, the transport, postal and warehousing sector had the highest rate of implied future adoption at 41 per cent.

The public administration and safety sector had the lowest adoption at 15 per cent.

Primary Fleet Solution in 10 – 15 Years



Perceptions of Electric Trucks

A key driver of the adoption of electric vehicles are current perceptions relating to the operation of electric trucks here in Australia.

Opinion continues to be mixed, with approximately half of businesses somewhat / strongly agreeing that electric trucks are suitable for Australian conditions (55 per cent), are reliable (55 per cent) and have a strong residual value (51 per cent).

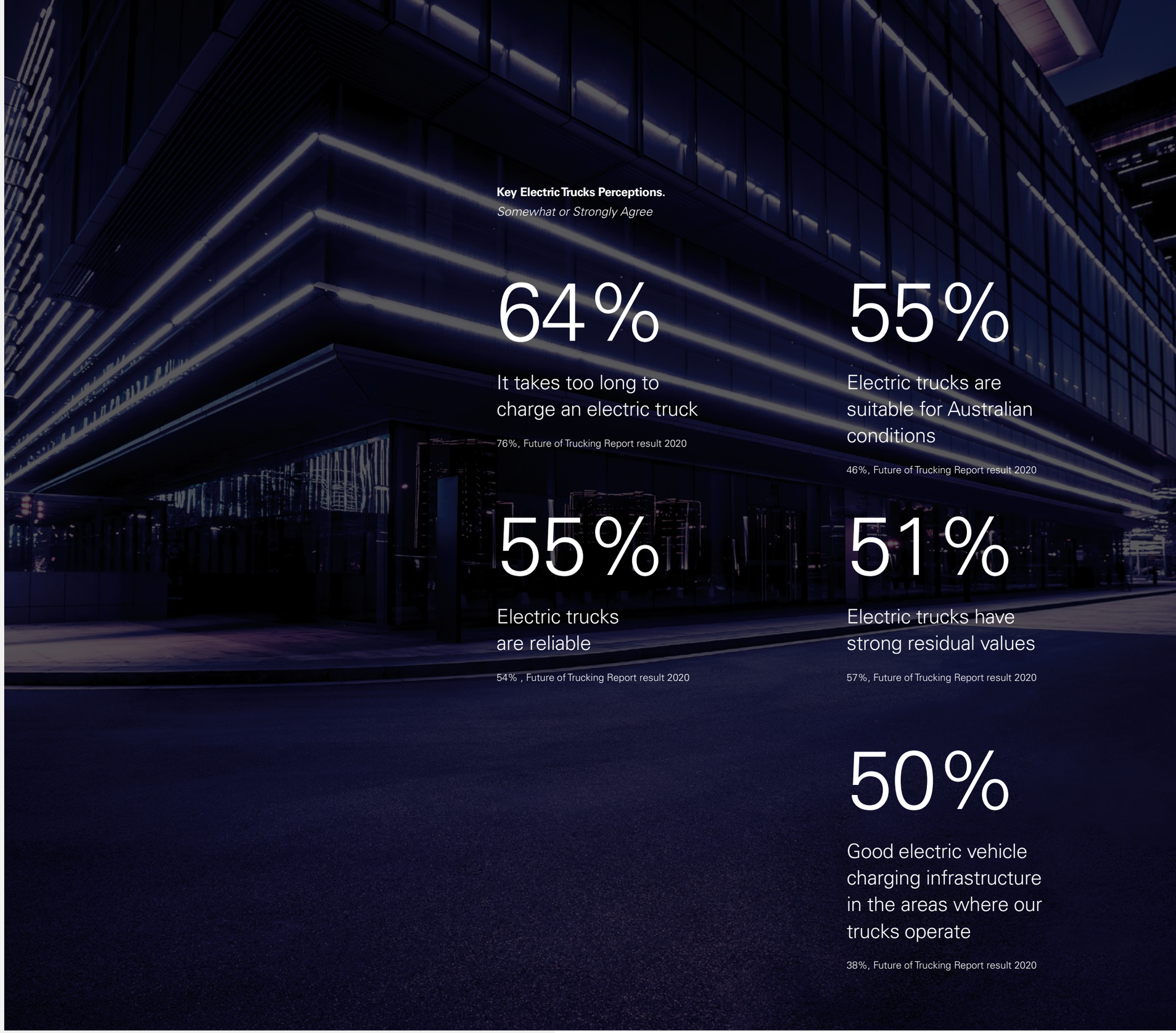
Additionally, there are still perceived concerns about electric truck charging. 64 per cent of respondents somewhat / strongly agreed that charging an electric truck takes too long, whilst only 50 per cent somewhat / strongly agreed that there was good electric vehicle charging infrastructure where trucks operate.

When we look at this concern by sector, we find pessimism around electric truck performance is more prevalent from the Transport, Postal and Warehousing industry, those in Manufacturing as well as the Utilities and Waste services sector – perhaps not surprisingly, these are sectors that in numerous instances have been early adopters of electric trucks and have experienced the early adopter challenges of implementing this new technology.

Despite these mixed opinions, there is growing positive sentiment towards some elements. Perceptions of charging time, suitability for Australian conditions and charging infrastructure have all improved since the last Future of Trucking Report.

Responses also suggest that there remains a knowledge gap when it comes to the viable commercial use of electric trucks. Across all key perceptions, approximately 25 to 30 per cent of those surveyed responded 'neutral' to key questions.

It's clear that both OEMs and the industry at large must continue to provide reliable and accurate information about this emerging technology and how it can and should answer the needs of Australian businesses.



2. Key Takeaways

- Strong appetite for a zero – emission future amongst all participants.
- Electric vehicles to form a key part of Australia's transport future in the next 10 – 15 years
- Perceptions have improved about the current suitability of electric trucks and supporting charging infrastructure.

3. Industry Expert Insight

Grant Cooper

Chief of Strategy, Isuzu Australia Limited

Grant has a background in strategy consulting, working with a range of organisations to solve complex problems and deliver growth through customer–led innovation.

Having started his career in design and more recently completing an MBA at the globally recognised Melbourne Business School, Grant brings a critical eye to the future of the road transport industry and is now Chief of Isuzu Strategy – including product strategy and customer engagement.

This follows four years of different strategic roles within Isuzu, including Head of Innovation and Connected Technology roles.

As this report highlights, the momentum in the electrification of passenger and commercial transport continues to build in Australia, as evidenced by the growth in both total sales and the increasing number of product offerings, so it's timely to review what the picture looks like for road transport vehicles in Australia.

What we already know is that transport (of all kinds) makes up 19 per cent of Australia's emissions – according to government figures – that's a fair chunk.

Light commercial vehicles and passenger cars combined produce the lion's share, contributing 60 per cent of our transport emissions and over 10 per cent of the country's total emissions tally according to government stats.

What we also know is that Australia is taking a somewhat 'slow and steady' approach, while the window to achieve what many of us would desire – a carbon neutral transport fleet – is progressively closing.

We are however on the cusp of genuine retail availability from proven volume players with the backing, footprint, and support to deliver fit–for–purpose electric solutions to a greater slice of Australian transport operators.

Another key driver in the push for an electric fleet are shifting corporate objectives. A factor in many of these strategies are strong commitments to reduce or altogether eliminate carbon emissions within a businesses' operations, starting of course with transport fleet preferences and arrangements.

Collectively, we're on the right path and as the findings in this report suggest, progress is being made, but like any revolution, there are some challenges we all face.

A key hurdle for many years has been the lack of an established, cohesive approach and mandated standards when it comes to rolling–out EV technology and infrastructure – from all levels of government. This has only very recently been addressed in the passenger car space, but there's still work to be done when it comes to commercial vehicles.

We must remind ourselves of the importance of adopting a long–term outlook when assessing new technologies though.

By staying informed, patient, and forever critical, we can better navigate the transition to electrification and make wiser decisions for our future. Afterall, the sum game for many of us is to see EV as widely accepted and applied as possible, so its feasibility and value can be fully recognised.

4. Insight Charts

Adoption of Zero Emission Strategy for Fleet Vehicles by Industry

	All%	Construction	Electricity, Gas, Water & Waste Services	Manufacturing	Mining	Public Admin & Safety	Rental Hiring & Real Estate	Retail Trade	Transport, Postal & Warehousing	Wholesale Trade	Other
Yes, now	10%	8%	8%	12%	12%	6%	7%	10%	12%	7%	7%
Yes, within 2 Years	40%	40%	31%	35%	38%	41%	36%	44%	50%	40%	22%
Yes, within 5 Years	30%	33%	36%	34%	34%	35%	32%	32%	24%	34%	22%
Yes, within 10 Years	11%	9%	21%	8%	8%	11%	16%	9%	9%	12%	26%
No, not considering	9%	10%	5%	11%	8%	7%	9%	5%	5%	7%	22%

Primary Fleet Vehicle in 10 – 15 Years by Industry

First Second Third

	All%	Construction	Electricity, Gas, Water & Waste	Manufacturing	Mining	Public Admin & Safety	Rental Hiring & Real Estate	Retail Trade	Transport, Postal & Warehousing	Wholesale Trade	Other
Battery Electric Vehicle (BEV)	31%	33%	31%	29%	18%	15%	30%	33%	41%	26%	20%
Internal Combustion Engine or Hybrid	47%	40%	36%	41%	64%	50%	36%	41%	46%	54%	52%

Electric Trucks Perceptions by Industry

First Second Third

	All%	Construction	Electricity, Gas, Water & Waste Services	Manufacturing	Mining	Public Admin & Safety	Rental Hiring & Real Estate	Retail Trade	Transport, Postal & Warehousing	Wholesale Trade	Other
It takes too long to charge an electric truck	64%	62%	59%	69%	58%	52%	70%	60%	65%	66%	66%
Electric trucks are suitable for Australian conditions	55%	55%	54%	52%	38%	49%	52%	61%	65%	57%	45%
Electric trucks are reliable	55%	54%	49%	55%	42%	43%	59%	56%	63%	64%	48%
Electric trucks have strong residual values	51%	51%	52%	49%	38%	44%	41%	50%	65%	54%	38%
Good electric vehicle charging infrastructure in the areas where our trucks operate	50%	51%	46%	50%	44%	44%	43%	49%	61%	52%	31%

Truck Maintenance

1. Truck Maintenance Overview
2. Key Takeaways
3. Industry Expert Insight
4. Insight Charts

1. Truck Maintenance Overview

Neglecting thorough, efficient, and timely vehicle maintenance can significantly disrupt the smooth operation of Australia's road transport sector.

The distances, climate, road conditions and unrelenting freight task are often underestimated factors considered by business operators.

A deepened understanding of the broader maintenance, service, parts and compliance space contributes to improved efficiency, reduced downtime, increased productivity and on the compliance front, bolsters safety for industry stakeholders and road users alike.

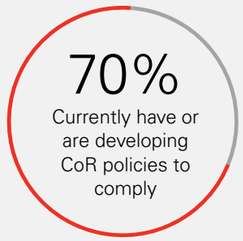
To this end, our collective appreciation of these obligations and how to manage those responsibilities continues to be a key focal point for the industry.

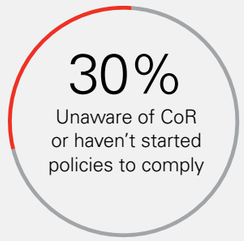
Chain of Responsibility

A key compliance item for the industry is Chain of Responsibility legislation, with the level of awareness remaining unchanged from the last Future of Trucking report in 2020.

Chain of Responsibility (CoR) is the part of the Heavy Vehicle National Law (HVNL) which determines that every party involved in the supply chain is responsible to ensure that specified safety standards are met.

Compliance with Chain of Responsibility





Owner Driver	67%	33%
Fleet Contractor	72%	28%
National Fleet	81%	19%
Government	73%	27%

Similar in scope to obligations Australian businesses have under work health and safety laws, CoR ensures operators identify the risks involved in transport activities, assess those risks, eliminate them, or if they can't be completely eliminated, minimise them as much as possible.

Encouragingly, 70 per cent of businesses already have policies in place or are currently developing policies to ensure their operation complies with the HVNL.

Business type data reveals that National Fleet Operators (81 per cent) and businesses operating in the Transport, Postal and Warehousing sector (75 per cent) have the highest rates of compliance. Given the larger volume of trucks that these businesses manage across the country, these results continue to be encouraging.

However, given the significant negative impact resulting from a CoR incident, it is a troubling thought for the industry and other road users that 3 out of 10 operators either haven't developed policies, are not aware of CoR or believe it doesn't apply to them.

The Business Owner/ Driver group, constituting 55 per cent of respondents, had some of the lowest levels of awareness when it came to CoR as a concept and in terms of developing in–house policies or plans to address compliance in a structured way.

Service Locations

Compliance with regulations necessitates a geographically diverse service and repair network, making it a key business consideration, particularly for larger fleets
(as shown in this report). Operators across various applications prioritise a proven service network when making purchasing decisions.

Findings relating to the location of truck service and maintenance preferences for truck operators reveal a split between in–house servicing and the outsourcing of this work to OEM branded truck dealers or independent workshops.

Further analysis of this split reveals that the majority of major repair work however is still being undertaken within OEM truck dealerships (42 per cent) as opposed to independent workshops (34 percent) or on–site arrangements (24 per cent).

Major Truck Repair Location Preference

Data reveals the top 3 driving forces behind these decisions are quality of workmanship (57 per cent), timeliness or service (55 per cent), and availability of parts (54 per cent).

Adding to this, the preferences of National Fleet Operators are further influenced by not only the quality of workmanship (65 per cent), but equally by the quality of customer service and support (65 per cent), and workshops having the latest technical information and diagnostic tools (65 per cent).

Scheduled Servicing & Travel Times

As with any high–value capital equipment, it must be maintained to ensure its safe operation for all parties involved and to ensure efficient operation of the task it's performing.

Businesses that have considered scheduled servicing options as part of a new truck purchase indicate a preference towards a tailored servicing agreement package (41 per cent), be that upfront or across scheduled instalments.

With quality of workmanship noted as a key factor for all business operators, accessibility to preferred servicing providers becomes another key challenge.

74 per cent of all respondents expect their trucks will be able to be serviced within a week of enquiring, while 55 per cent of those surveyed would only travel up to 1 hour to access a servicing location. National Fleet Operators noted a further dependence on travel distance, with 62 percent indicating they would only travel up to 1 hour.

Truck Parts

This report highlights a growing awareness among Australian businesses of the benefits associated with using genuine OEM components. These benefits include enhanced safety, compliance with regulations, and improved overall efficiency.

Perceptions of OEM genuine parts and componentry are very consistent, with all industry sectors holding strong positive views. A key consideration was chain of responsibility compliance, with 65 per cent of respondents agreeing that OEM parts and accessories helped ensure compliance obligations were met.

Vehicle uptime was also another key consideration, with 64 per cent of respondents agreeing on this business operation benefit.

Service Booking Preference

74%

Service booking within 1 Week of enquiry date

55%

Up to 1 hour travel to service location

Inclusion of Schedule Servicing During Truck Purchase

41%

Tailored Dealer Service Agreement packages (paid upfront or in monthly instalments)

21%

Dealer scheduled servicing cost included in purchase price of truck

25%

Dealer capped price scheduled servicing (fixed cost at time of service)

13%

Prefer to just review servicing options when scheduled service is due

2. Key Takeaways

- Awareness and action on Chain of Responsibility compliance remains unchanged from previous report.

- Preference for major repairs to be completed at OEM Dealership workshops.

- Strong preference for OEM parts and componentry.

3. Industry Expert Insight

Brett Stewart

Head of Aftersales, Isuzu Australia Limited

With his background as a diesel mechanic and a career spanning over 26 years in the transport industry including roles such as truck fleet maintenance manager, Brett moved across to OEM firstly as a Technical Support Consultant and now currently holds the position as Head of Aftersales with Isuzu Australia.

Brett's hands–on, in–depth technical and business knowledge brings an informed and valued aftersales industry perspective as we continue to support customers in today's challenging economic environment.

Having worked on, in and around trucks for a long period of time, I'm still perpetually surprised at how tough the Australian operating environment can be on the capital equipment we employ to 'get the job done.'

The vast distances, unforgiving climate, road conditions and the ever–growing freight task, make this country a unique but at times utterly unforgiving place to make a good buck in the road transport business.

Put simply, and from a maintenance perspective, we need to be on our game down here in Australia.

From our comprehension of and adherence to compliance obligations, to realising the efficiencies of regular scheduled maintenance – and even where to get that work done – all contribute to increased productivity and ultimately, more cash in the back pocket.

A non–negotiable in this mix is our Chain of Responsibility obligations (CoR).

Part of the Heavy Vehicle National Law (HVNL), CoR is about identifying risks involved in both on– and off–road activities, evaluating those risks and, where possible, removing them.

Our research confirms that Australian operators are doing a decent job of this, with 70 per cent of truck dependent businesses having effective CoR strategies in place. This is a good base no doubt, but as always, there's room for improvement.

Dissecting the data further, we can see that some smaller operations are still yet to truly grapple with compliance in a meaningful way, with the 'owner–driver' sub–group having the lowest levels of awareness of and planning for their CoR responsibilities.

For a multitude of reasons, we must collectively get to grips with compliance as an industry – if we are to continue to grow and prosper. One apt example is the attraction and retention of talent within our ranks. A compliant, safer, and more appealing work environment equates to the retention of better–quality candidates – it's a simple formula.

Building on the compliance factor further are findings relating to servicing and repair preferences in this report.

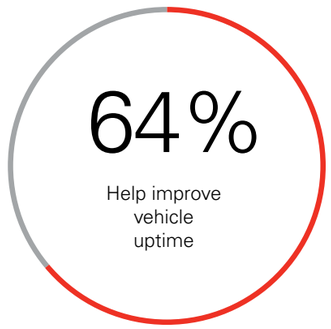
Encouragingly, the vast majority of major repair work being done within the Australian truck parc is being undertaken by OEM truck dealerships as opposed to third party workshops or on–site. This is an important point – for reasons of technical, product–specific know–how and knowledge – all equating to lasting repair solutions and reduced downtime.

As has always been the case in the world of aftersales and service support, there's a range of factors at play and all against the backdrop of an extremely demanding operating environment.

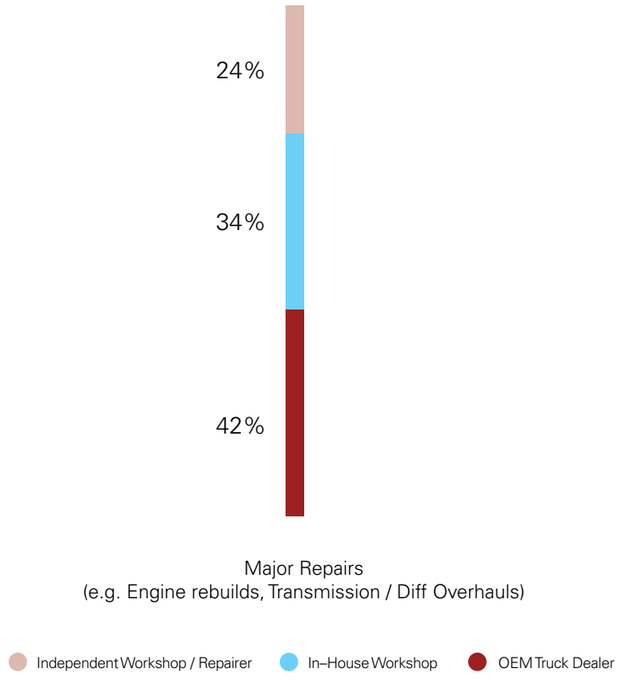
Given Australia's dependency on road transport within just about every industry imaginable, it'll be our ability to harness the best thinking, strategy and indeed the best people – that will enable us to continue to 'get the job done.'

4. Insight Charts

OEM Parts & Accessories



Major Truck Repair Location Preference



Compliance with Chain of Responsibility by Industry

First Second Third

	All %	Construction	Electricity, Gas, Water & Waste Services	Manufacturing	Mining	Public Admin & Safety	Rental Hiring & Real Estate	Retail Trade	Transport, Postal & Warehousing	Wholesale Trade	Other
Currently developing policies around how to comply with CoR	39%	43%	36%	47%	29%	40%	35%	43%	35%	49%	26%
Already have developed policies ensuring compliance with CoR	31%	27%	21%	24%	35%	23%	25%	29%	40%	23%	43%
Haven't started developing policies around how to comply with CoR	17%	16%	26%	21%	31%	23%	20%	15%	13%	14%	15%
CoR doesn't apply to our business	7%	7%	13%	5%	–	4%	5%	4%	5%	11%	13%
Not aware of CoR	6%	7%	5%	3%	6%	11%	15%	10%	6%	4%	4%

Major Truck Repair Location Preference by Industry

First Second Third

	All %	Construction	Electrical, Gas, Water & Waste	Manufacturing	Mining	Public Admin & Safety	Rental Hiring & Real Estate	Retail Trade	Transport, Postal & Warehousing	Wholesale Trade	Other
OEM Truck Dealer	42%	40%	40%	43%	54%	38%	38%	40%	43%	47%	57%
In–House Workshop	34%	32%	48%	33%	30%	42%	50%	27%	42%	25%	23%
Independent Repairer	24%	28%	13%	24%	16%	21%	13%	33%	15%	28%	20%

Utilisation of OEM Parts & Accessories by Industry

First Second Third

	All %	Construction	Electrical, Gas, Water & Waste	Manufacturing	Mining	Public Admin & Safety	Rental Hiring & Real Estate	Retail Trade	Transport, Postal & Warehousing	Wholesale Trade	Other
Help ensure Chain of Responsibility compliance	65%	68%	74%	68%	45%	72%	66%	65%	69%	73%	50%
Help improve vehicle uptime	64%	64%	66%	72%	49%	59%	72%	63%	65%	71%	62%

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