



Sustainable Reality Survey



2022 REPORT
DENMARK + SWEDEN

INTRODUCTION

WHERE SUSTAINABILITY MEETS REALITY

With Europe aiming to become completely carbon-neutral by 2050, the industry is working hard at moving towards conducting business in a more environmentally-conscious way. But there is no denying that marrying sustainability and reality can be challenging. To understand what the industry is **actually** doing, we launched our Sustainable Reality Survey in 2021.

Now, a year later, the second iteration of that survey was meant to track the evolution in behaviours. How have perceptions shifted? And more importantly, did **behaviours** change? With the results of the 2022 survey processed and analysed, that's exactly the question we are now able to answer.

For example, looking at the general results across Europe, there is a very clear evolution in how people perceive sustainability.

While sustainability remains important as a corporate value, more and more fleets are seeing sustainable measures as an opportunity to reduce operation costs, going from 32% in 2021 to 41% of fleets in 2022.

Another key insight is the importance of fleet size when it comes to the implementation of sustainability measures. 24% of smaller fleets (<50 trucks) have sustainability measures in place, indicating that for these fleets, sustainability is a more recent point of interest. However, for larger fleets (> 500 trucks), sustainability has been on the agenda for quite

a bit longer: 74% of these fleets already have well-established and defined sustainability measures in place.

In other words: the larger the fleet, the more attention is paid to sustainability, but we also see that smaller fleets are becoming more involved.

These are only a handful of insights gleaned from the 2022 sustainable reality survey. In 2022, a total of 1431 companies from 33 countries took part in the survey, giving us fascinating insight into this high-profile issue. Goodyear has also been working in partnership with non-profit organisation TreeNation, which has planted a tree for each survey response received.

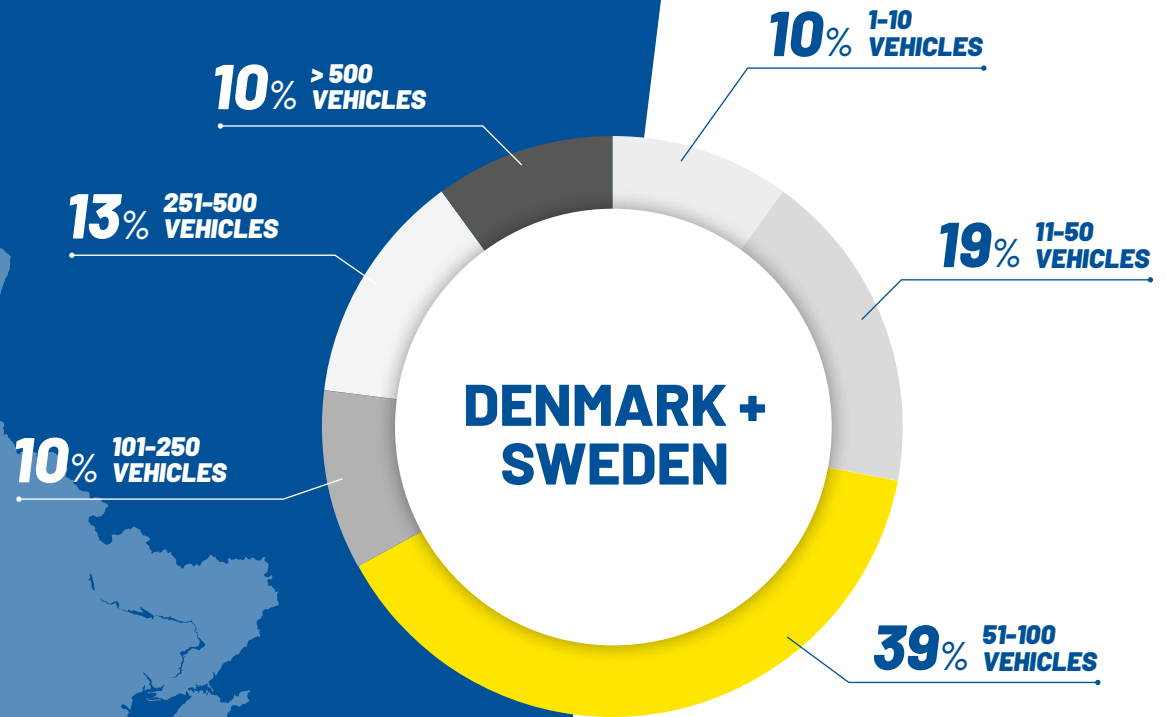
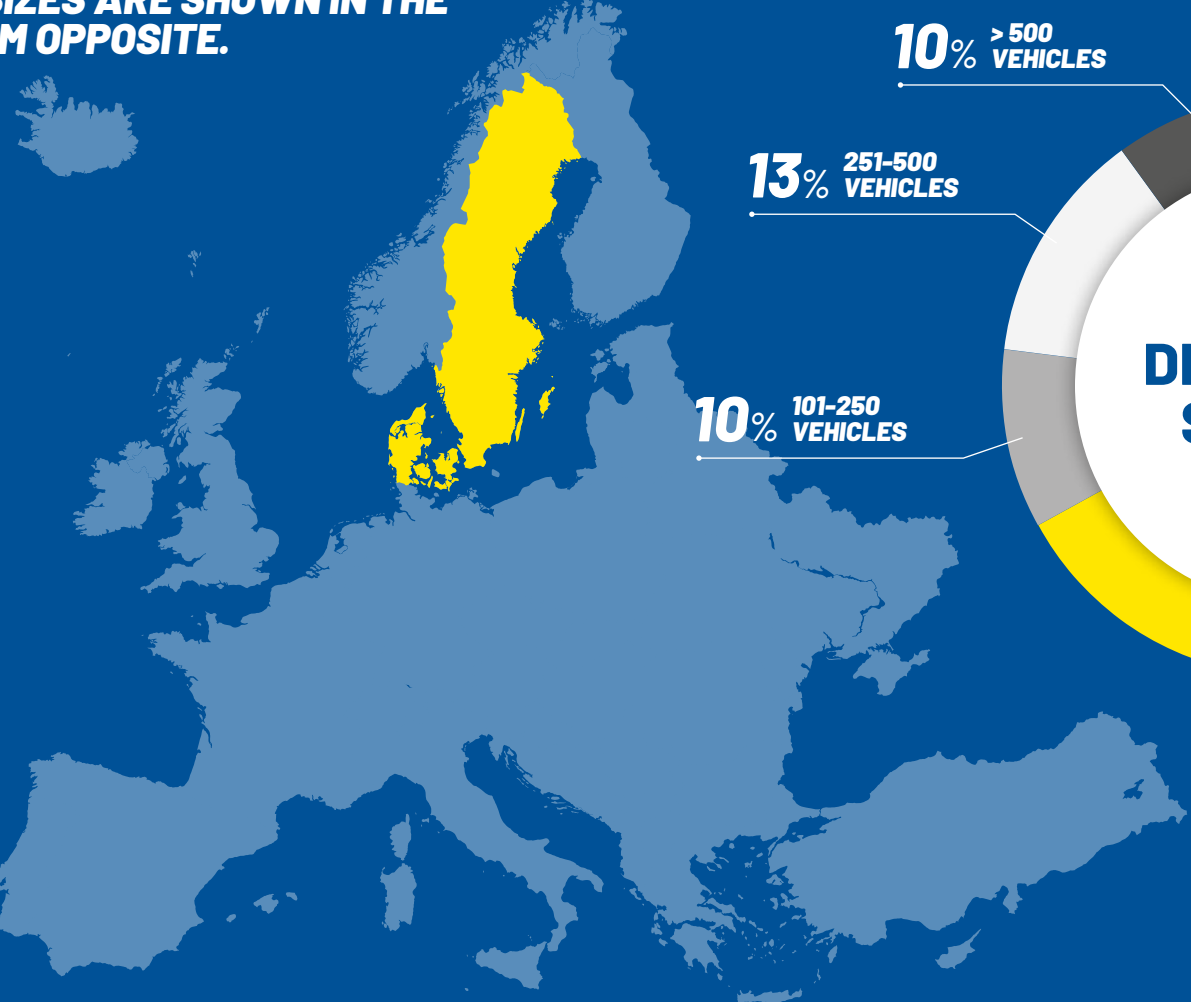
This report summarises the survey's key findings, gives access to the detailed numbers behind each question asked, and examines how these have evolved from last year. As we all work together to encourage and promote sustainable operations, we hope these are insights you will find both revealing and encouraging.

Sustainably yours
Goodyear



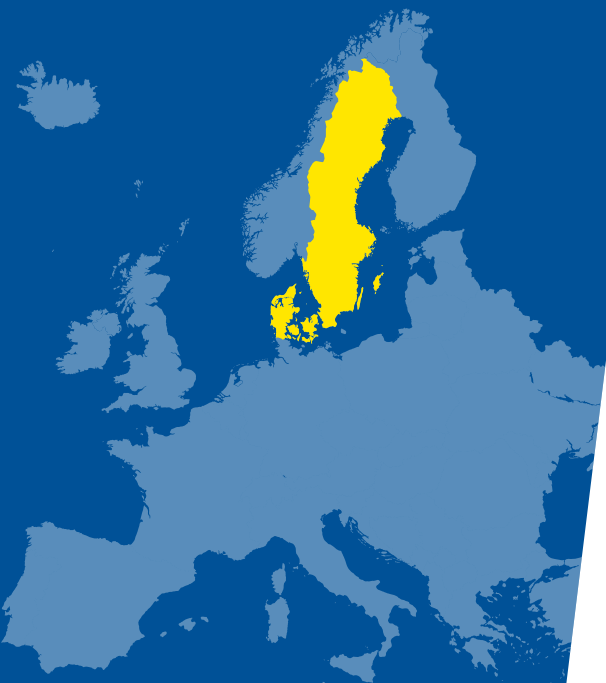
THE FOLLOWING PAGES OF THE REPORT ARE BASED ON SURVEY RESPONSES PROVIDED BY TRUCK FLEETS IN **DENMARK AND SWEDEN**, WITH INSIGHTS SPECIFIC TO THESE COUNTRIES.

IN TOTAL, **31** RESPONSES WERE RECEIVED; FLEET SIZES ARE SHOWN IN THE DIAGRAM OPPOSITE.



HOW IMPORTANT IS ENVIRONMENTAL SUSTAINABILITY FOR YOUR COMPANY?

74% of fleets recognize sustainability as highly important or important.



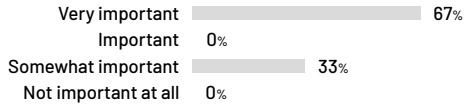
26% SOMEWHAT IMPORTANT

32% VERY IMPORTANT

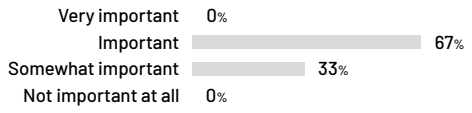
42% IMPORTANT



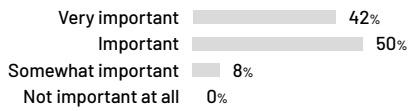
1 – 10 VEHICLES



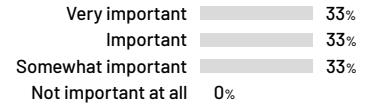
11 – 50



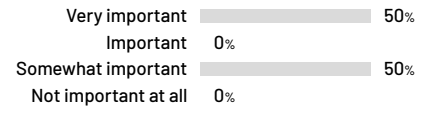
51 – 100



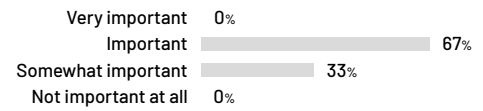
101 – 250



251 – 500



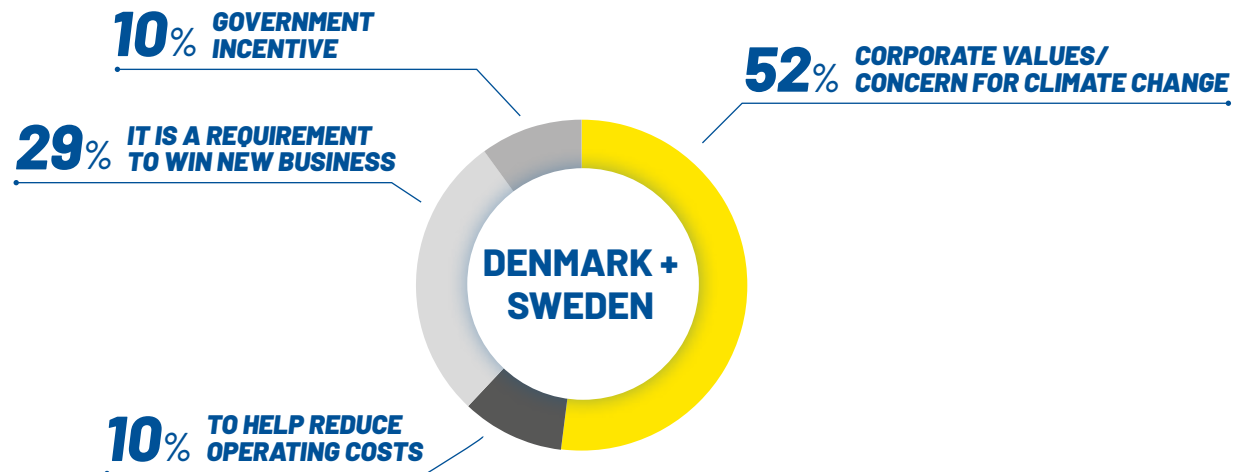
> 500



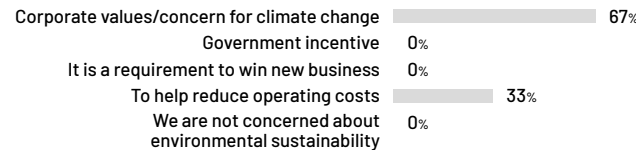
WHY DOES YOUR COMPANY CARE ABOUT THE ENVIRONMENTAL SUSTAINABILITY OF YOUR OPERATIONS?

52% of fleets consider sustainability a value driver for their corporate image.

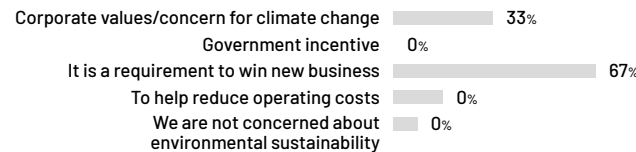
Sustainability is first and foremost a value driver, regardless the size of the fleet.



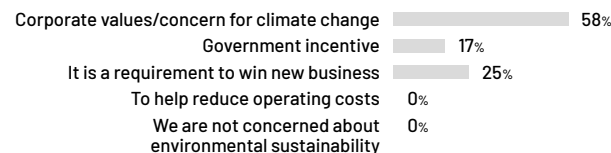
1 – 10 VEHICLES



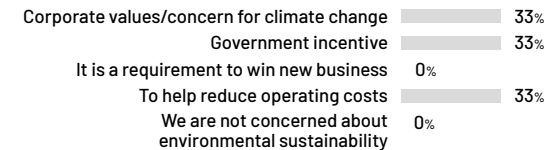
11 – 50



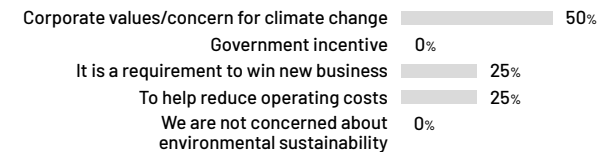
51 – 100



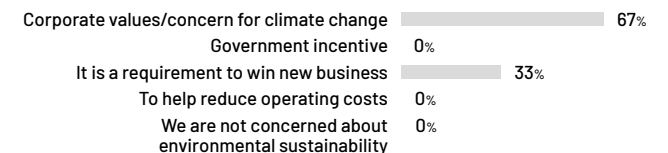
101 – 250



251 – 500



> 500



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

In order to hit their target 71% of fleets are fitting fuel efficient tyres and 65% are renewing their vehicles. The adoption of telematic solutions and training of drivers is also important.

RENEWAL OF THE VEHICLE PARK

65%

FUEL-EFFICIENT TYRES

71%

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

58%

TELEMATIC SOLUTIONS TO MONITOR AND REDUCE FUEL CONSUMPTION

52%

32%

DEPLOYING HIGHER CAPACITY VEHICLES/ DUO TRAILERS

26%

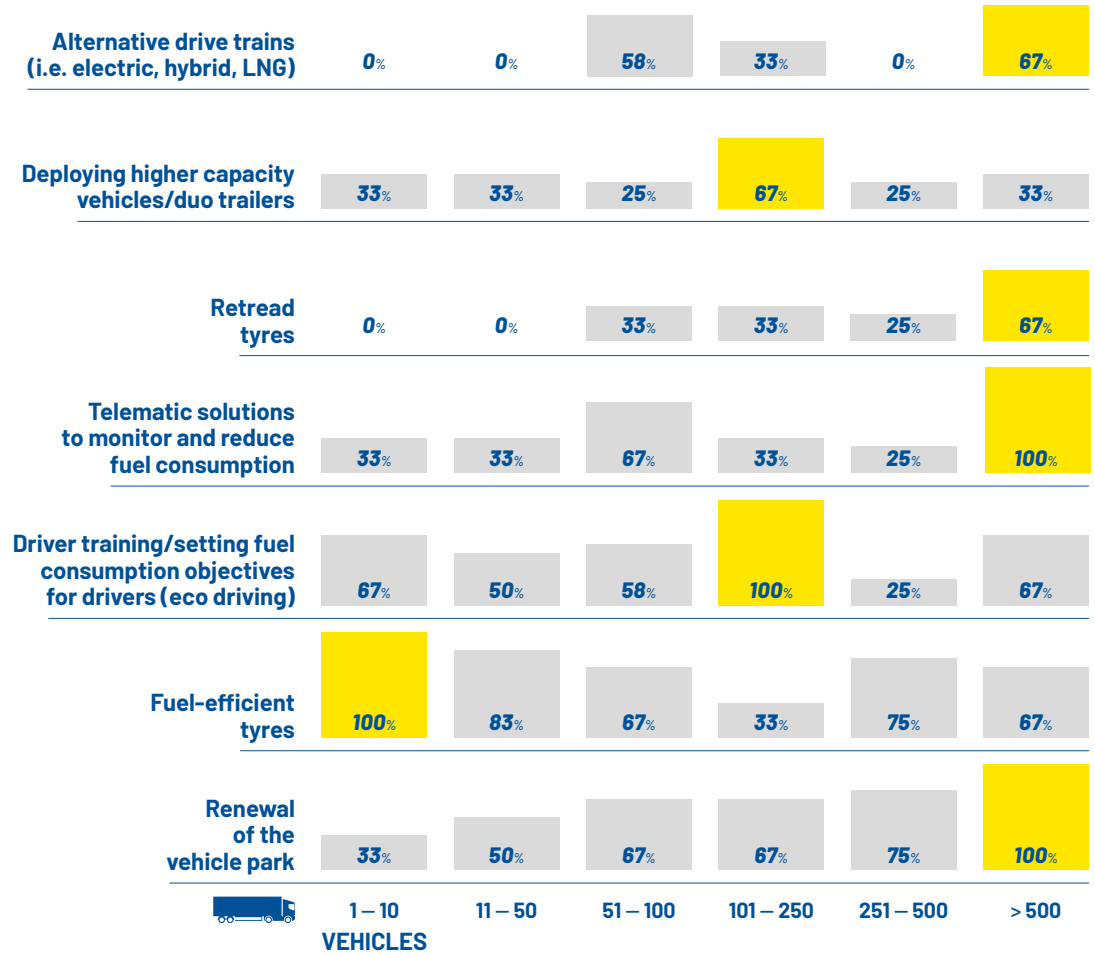
RETREAD TYRES

32%

ALTERNATIVE DRIVE TRAINS (I.E. ELECTRIC, HYBRID, LNG)



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

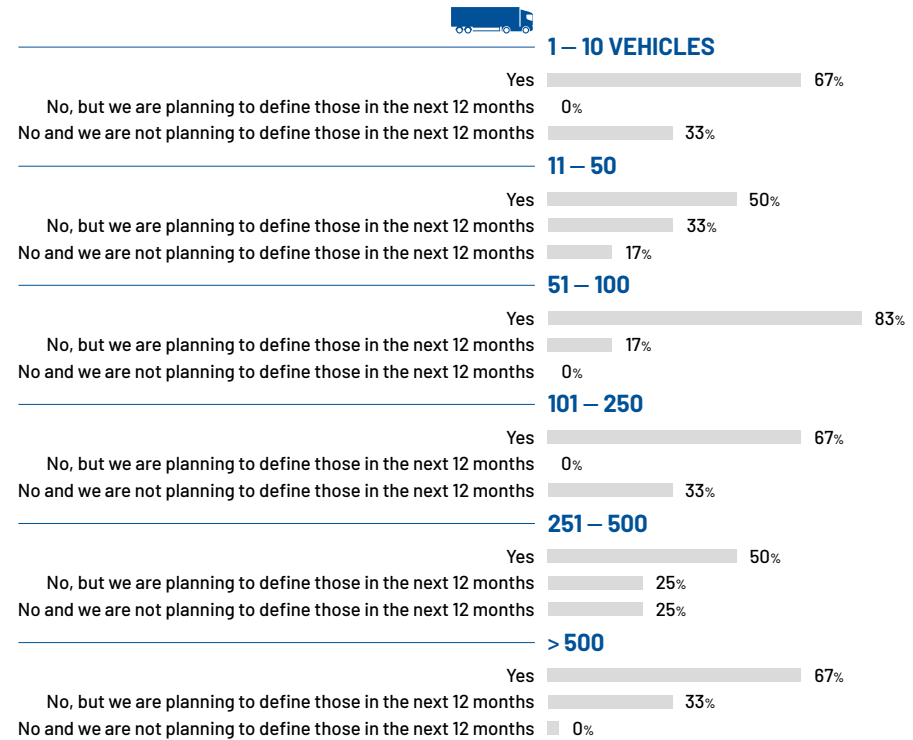
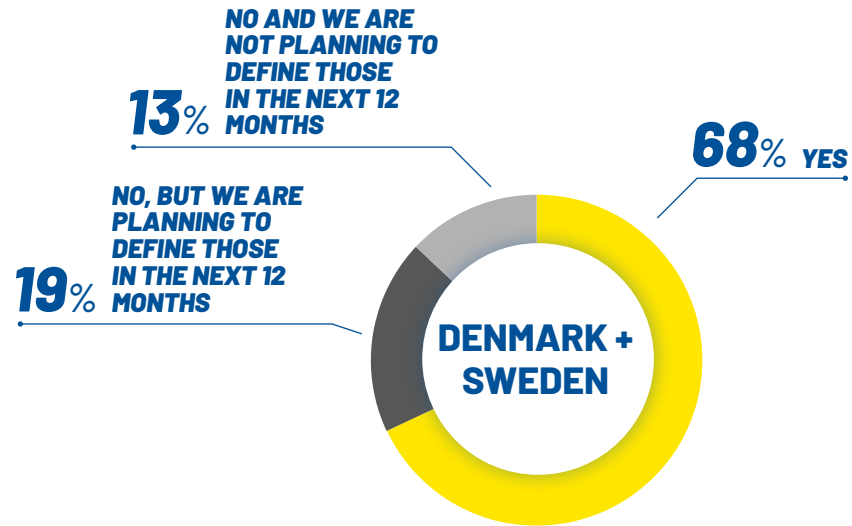


HAS YOUR COMPANY DEFINED AND FORMALISED SUSTAINABILITY OBJECTIVES AND MEASUREMENTS (EG CO₂ REDUCTION, WASTE MATERIAL REDUCTION)?

68% of fleets have defined sustainability goals. Sustainability objectives will be defined and formalized for 87% of fleets within the next 12 months.

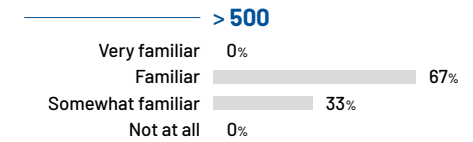
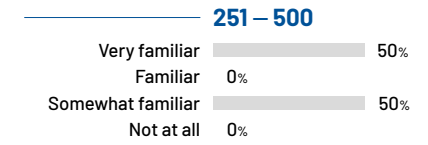
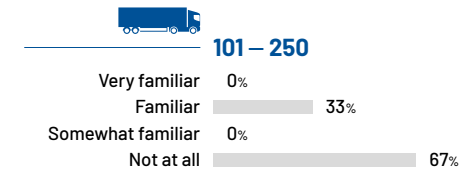
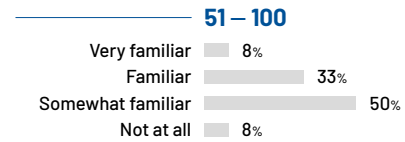
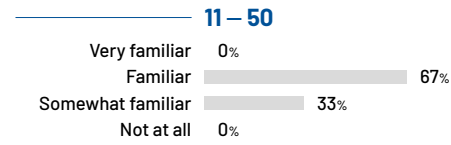
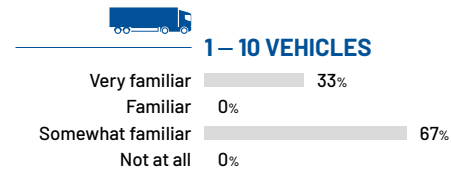
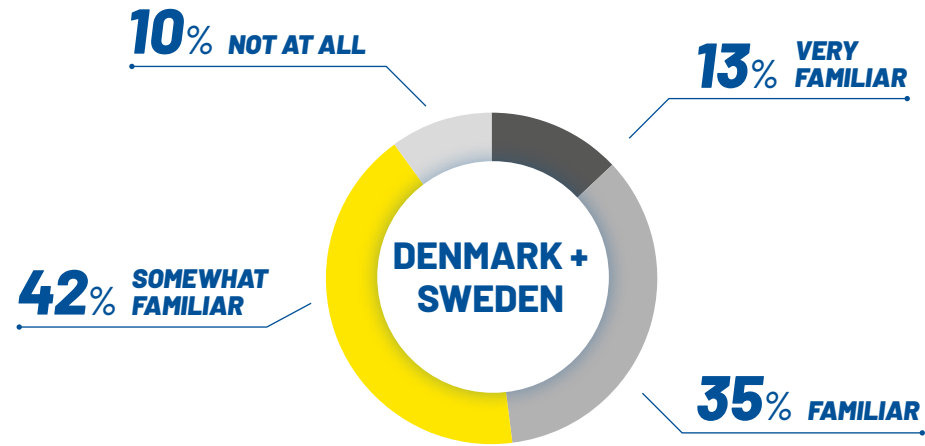
>50%

of large fleets have defined and formalised sustainability goals



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

~90% of fleets are informed about upcoming environmental legislation.



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

More cost effective and straightforward solutions would increase rate of adoption amongst fleets of all sizes.

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

42%

SOME SOLUTIONS ARE TOO EXPENSIVE

61%

WE DON'T HAVE ENOUGH PERSONNEL TO MANAGE OTHER SOLUTIONS

16%

23%

DOUBTS ON THE EFFICACY OF SOME SOLUTIONS

16%

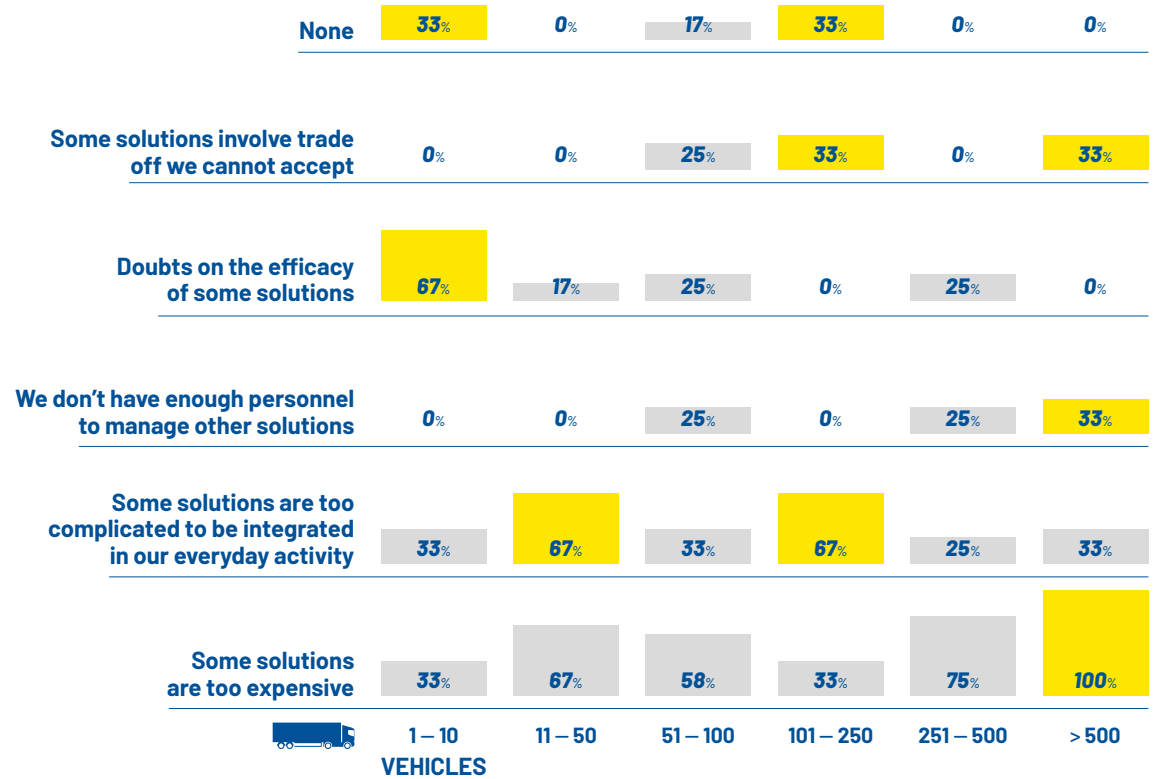
SOME SOLUTIONS INVOLVE TRADE OFF WE CANNOT ACCEPT

13%

NONE



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



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

61% of fleets consider increased demand from customers for sustainable operations as a driver, and 55% of fleets consider financial incentives as key in order to improve the sustainability of their operations.

**FINANCIAL
INCENTIVES**

55%

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

48%

**IMPROVED
KNOWLEDGE OF
ENVIRONMENTAL
REGULATIONS**

23%

61%

**INCREASED DEMAND
FROM CUSTOMERS**

32%

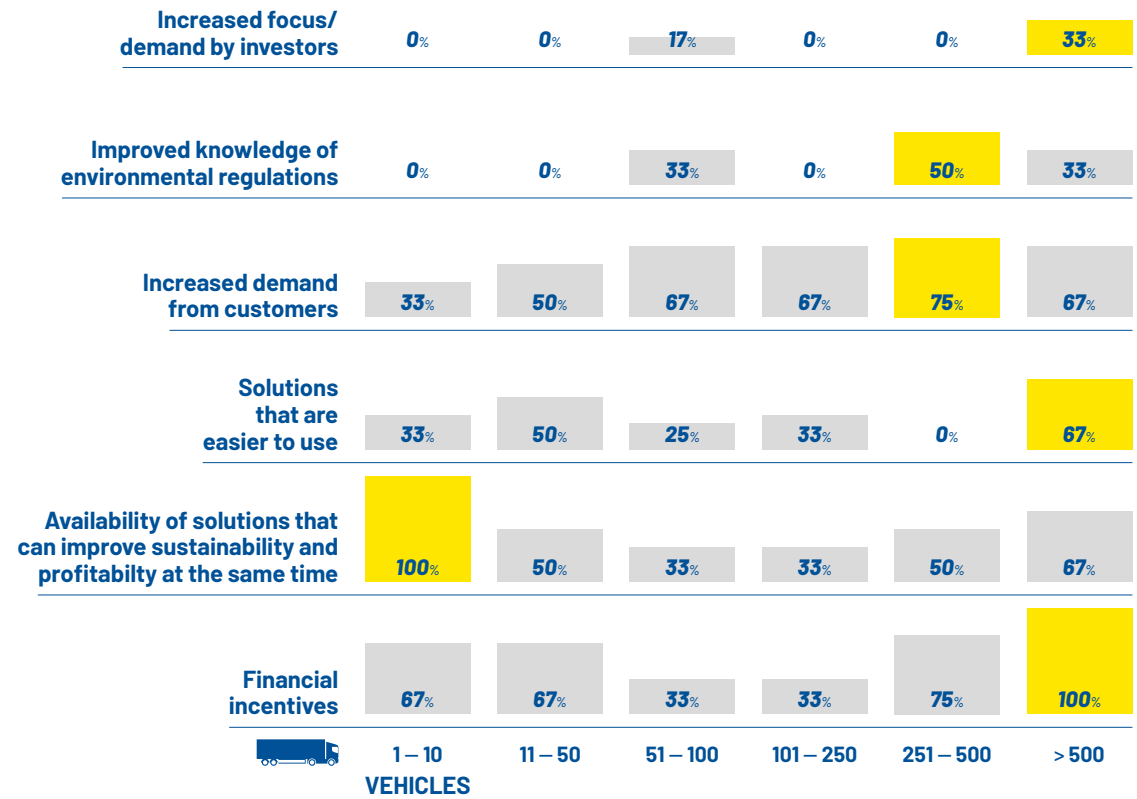
**SOLUTIONS
THAT ARE
EASIER TO USE**

10%

**INCREASED FOCUS/
DEMAND BY
INVESTORS**



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



An aerial photograph of a two-lane road winding through a dense forest. The road is dark asphalt with white dashed lines. The trees are lush green, with some yellowing on the left side, suggesting autumn. The Goodyear logo is centered over the road.

GOODYEAR®