



# Mobilizing the Future of Fleets Report 2026 Equipment Utilization Edition



# The Utilization Gaps Fleets Cannot Afford to Ignore

Equipment utilization is rapidly emerging as one of the most important and complex drivers of operational performance, and as capital investment in equipment grows, project environments become more dynamic and margin pressures intensify, organizations are being challenged to shift their focus from simply managing assets to maximizing the productivity, availability and value those assets deliver.

The industry now stands at a pivotal moment where digital technology adoption across equipment fleets is widespread, providing unprecedented visibility into asset location, condition and performance. Yet, visibility alone is no longer the end goal, and as fleets mature in their technology adoption, the challenge has evolved from collecting data to embedding it into coordinated, predictive and optimized operations.

Our latest edition of Mobilizing the Future of Fleets reveals that while most organizations recognize the importance of utilization and trust the data available to them, many still operate fragmented ecosystems, processes and decision making. These disconnects then continue to drive inefficiencies such as avoidable downtime, excessive idling and equipment hoarding, limiting productivity and inflating cost of ownership.

This research explores the barriers preventing fleets from realizing the full value of utilization insight, and highlights how organizations that unify data, processes and operational governance will be best positioned to unlock capital efficiency and long-term competitive advantage.

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# Foreword

The findings in this report reveal something significant - that utilization is becoming one of the most powerful and under-leveraged drivers of operational and financial performance across equipment-intensive industries.

There is a distinct gap between digital adoption and digital maturity; fleets are investing in tracking, telematics and integrated equipment platforms at unprecedented levels, but many deployments remain incomplete, creating pockets of insight rather than organization-wide intelligence - a fragmentation which limits the ability to translate data into consistent decision-making and leaves organizations managing utilization reactively rather than strategically.

As highlighted throughout the report, the opportunity for improvement is substantial, and even modest improvements in utilization can unlock major productivity gains, reduce unnecessary capital expenditure and strengthen operational resilience. Yet despite widespread digital investment and strong confidence in utilization data, many organizations remain constrained by incomplete visibility, fragmented systems and operational practices that struggle to keep pace with technological capability - the challenge has evolved from collecting data to embedding it into everyday operations in an effective way.

The facts are that as equipment ecosystems become more connected with other operational platforms, utilization is evolving from a backward-looking efficiency metric into a forward-looking performance discipline, and organizations that integrate telemetry, maintenance intelligence and operational workflows are optimizing and orchestrating asset performance at scale.

This shift represents a fundamental transformation in how fleets operate, compete and grow – less equipment hoarding and short term thinking, and more towards embedding utilization intelligence into everyday decision-making, strengthening governance around data quality and create operational cultures that trust and act on real-time insight.

The next phase of fleet evolution will be shaped by those organizations – those who are willing to move beyond visibility toward optimization, those who reduce inefficiencies, increase agility and unlock entirely new levels of operational performance, and ultimately, those who close the utilization gaps that their competitors continue to ignore.



*Alain Samaha*

**Alain Samaha**

Chief Executive Officer  
Teletrac Navman



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# Only 28% of fleets have fully implemented utilization technology

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## Equipment Visibility and Technology Deployment

Digital technology adoption to support equipment utilization is now widespread, with 84% of organizations reporting the use of telematics, asset tracking or integrated equipment management systems ranging from basic telematics to fully integrated ERP and maintenance management platforms.

This reflects a clear industry shift toward data-driven asset visibility, particularly as organizations look to improve equipment productivity, reduce downtime and support more informed fleet planning decisions. However, while many fleets have in fact progressed beyond entry-level monitoring tools, with 69% reporting the use of more advanced and integrated technology platforms designed to enhance asset performance and operational coordination, deployment maturity varies significantly, with only 28% of organizations reporting that their digital utilization solutions are fully implemented across their fleets and 51% saying their systems remain only partially deployed.



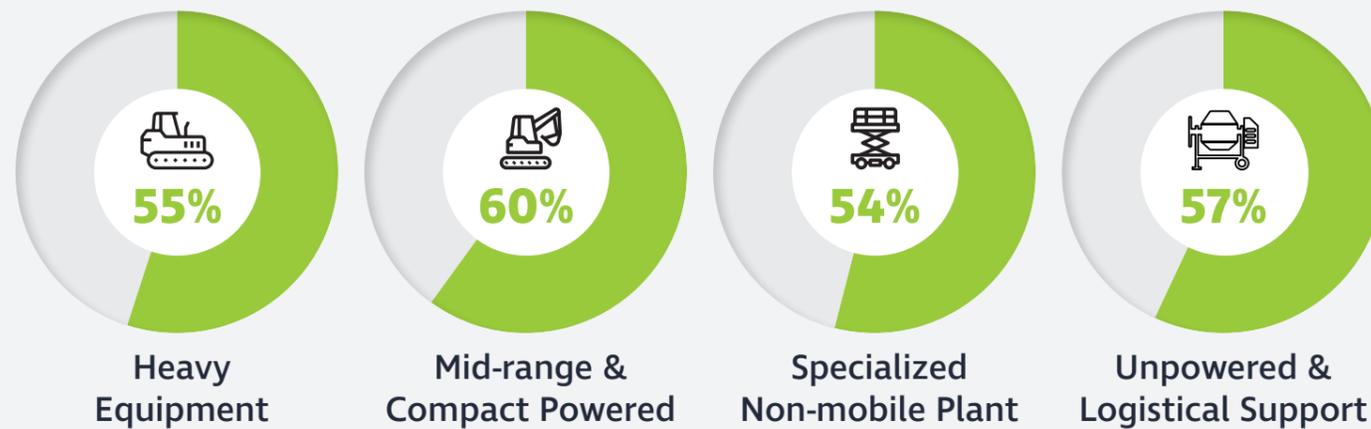
# How Deployment Falls Short of Potential

This partial implementation can result in incomplete visibility across asset classes, projects or operating environments, which is supported by the fact that only 40% to 46% of fleets are receiving live utilization data from more than half of their assets.

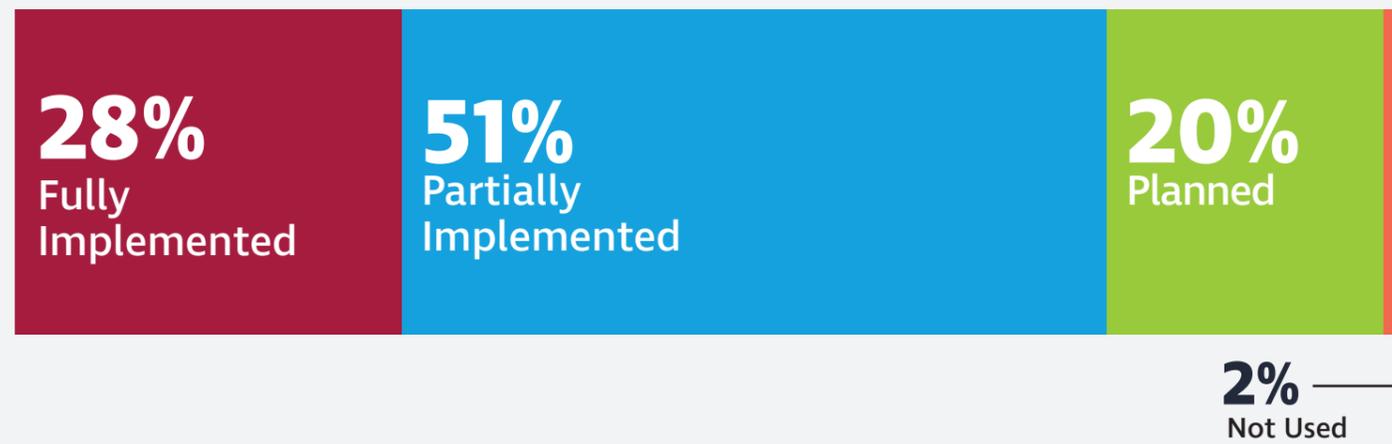
This implies that, as live performance monitoring has not yet reached full fleet scale, those organizations may struggle to generate consistent utilization insights across their operations, and together, these findings suggest that while fleets recognize the strategic value of digital utilization technology, many have yet to realize its full operational and analytical potential.

The result of such fragmented systems? An increased risk of disconnected data, limited cross-fleet performance benchmarking and reduced ability to drive sustained utilization improvements.

## % of assets providing real-time utilization data, by equipment category



## Adoption of digital equipment management systems across organizations





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# 81% of fleets trust their utilization data

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## Confidence in Utilization Data Versus Measurement Reality

Confidence in utilization data remains high across the industries, with 81% of respondents stating they trust the accuracy of their data and reporting processes. This reflects a strong organizational belief in existing measurement frameworks and highlights the growing role utilization insight plays in planning, scheduling and asset allocation decisions; however, this confidence often sits alongside ongoing challenges in how utilization is defined across different teams and systems. This suggests that while over 80% of fleets report using digital technology to monitor utilization, only 28% say their solutions are fully implemented across their equipment fleets, with more than half reporting partial deployments - a fragmented coverage which leaves many organizations only capturing utilization data across selected asset groups or operating environments, limiting the completeness and consistency of performance insights.

What's more, manual data capture also remains widespread, with 75% of fleets still relying on operator or supervisor logs either as a primary tracking method or alongside digital systems, even though they are much more prone to errors, inaccuracy and poor data quality when compared to real-time data.

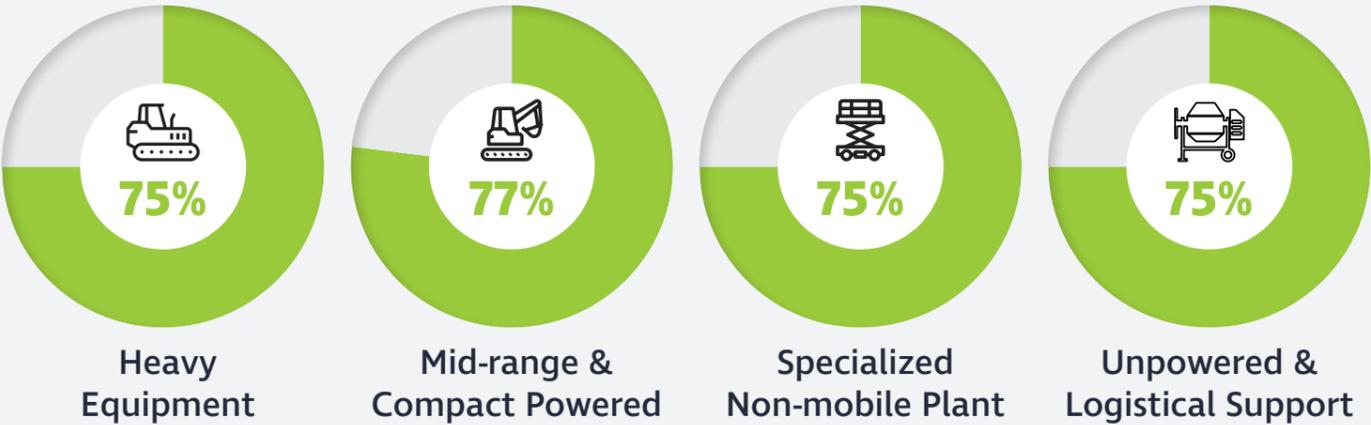


# Building Confidence Through Full Integration

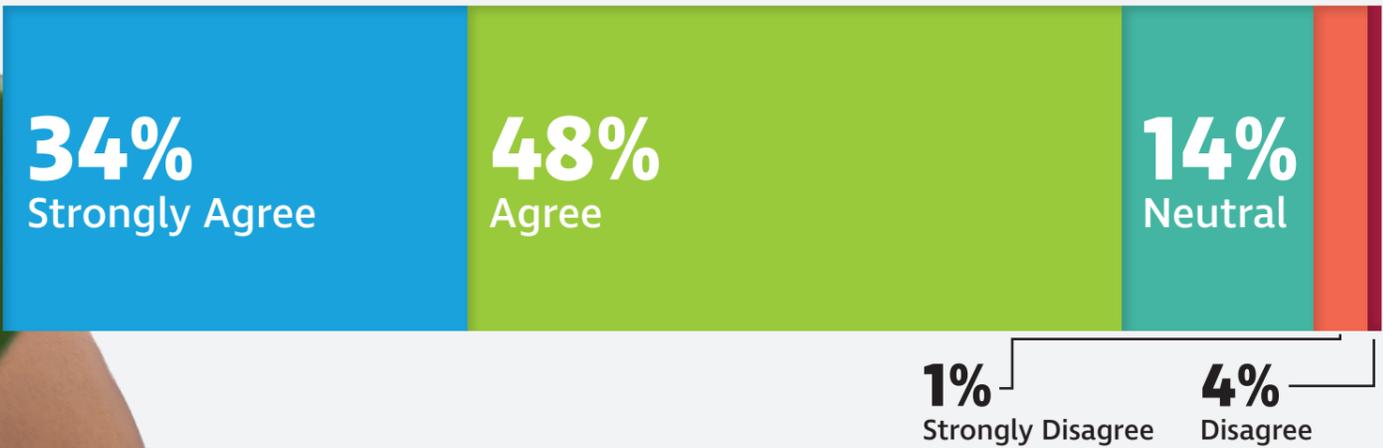
This hybrid monitoring approach can not only introduce inconsistencies in measurement accuracy, reporting timeliness and data reliability, but it can also highlight a potential maturity gap in utilization management whereby perceived data accuracy may exceed actual coverage and standardization across assets.

In recognizing this, 87% of organizations agree that improved location intelligence would enhance their equipment utilization, which reinforces the industry's acknowledgment that expanding real-time visibility and integrating utilization data across operational systems will be critical to achieving more proactive, data-driven fleet optimization.

**% relying on manual processes to track utilization** (full or partial reliance)



**% confident in the accuracy of utilization data**





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# 87% of fleets recognize the importance of location intelligence

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## Barriers to Utilization Optimization

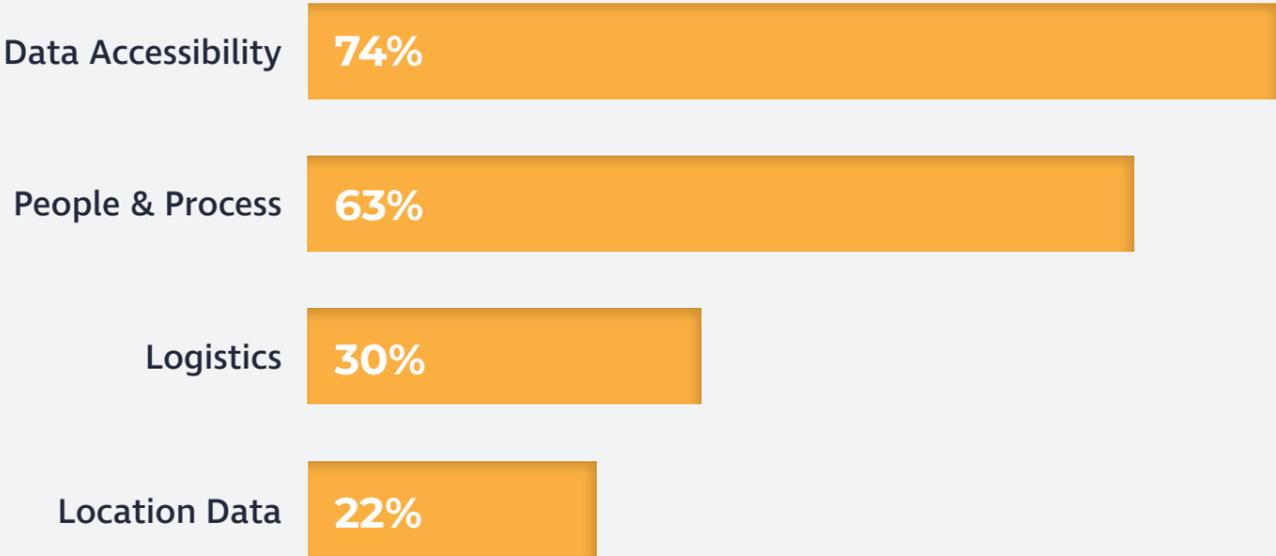
Despite 87% of organizations in agreement that improved location intelligence would enhance utilization, many fleets continue to operate partial systems or disconnected platforms. This limits actionable insights and reinforces data fragmentation, not to mention the added challenge of connecting different data sources, with incomplete integration across telematics, CMMS and dispatch systems, leaving utilization information siloed across asset categories and operational environments.



# Priorities Challenge System Confidence

Survey responses indicate a mismatch between confidence in existing systems and improvement priorities, as when asked about top initiatives over the next 12 months, 21% of organizations cited a focus on improving planning and scheduling, 17% as reducing downtime and idling and 14% as optimizing fleet size and mix – all of which highlight an underinvestment in technology as a lever for long-term gains, and an over pivoted approach towards operational improvement priorities rather than technology adoption.

## What are the main barriers currently preventing your organization from optimizing equipment utilization?



## What is your organization's top priority for improving equipment utilization over the next 12 months?



# 47% of equipment is underutilized

## Underutilized Assets and Capital Efficiency Risks

While a narrow majority of equipment is reported as being used more than half the time, a substantial share of assets across multiple categories remains underutilized, highlighting a significant opportunity to improve utilization across a range of equipment types, which could have the potential to significantly impact bottom line performance.

As organizations continue to invest heavily in equipment to support operational capacity and project delivery, maximizing asset productivity is naturally critical to controlling total cost of ownership and improving return on capital investment, although survey data shows that across both powered and non-powered asset classes, up to 47% of equipment is reported as sitting idle or unused for more than half of its operational lifecycle.

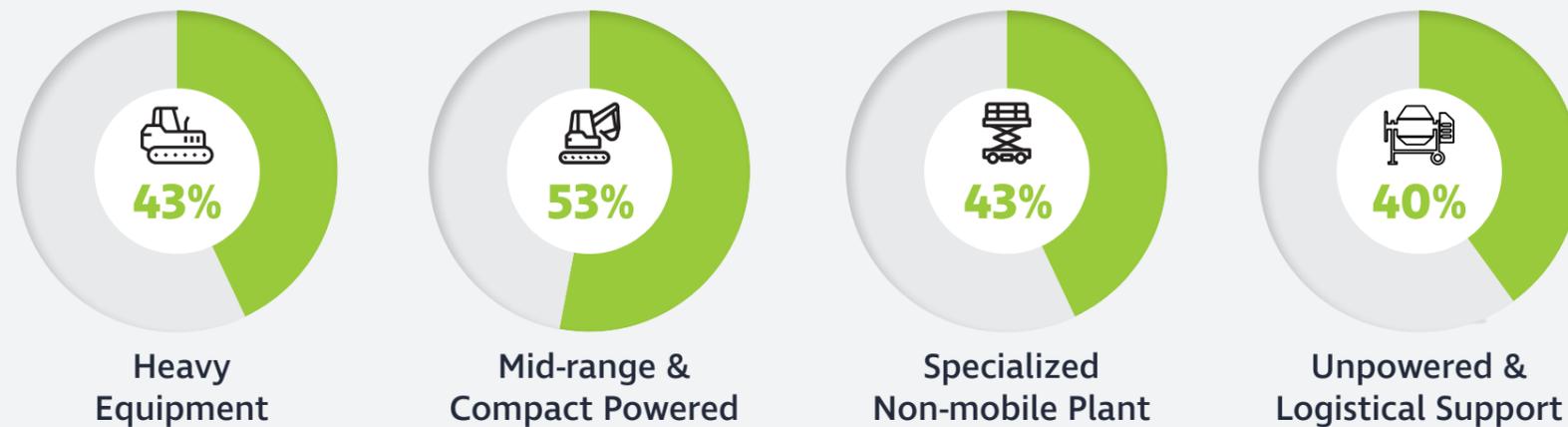


# The Cost of 'Idle' Equipment

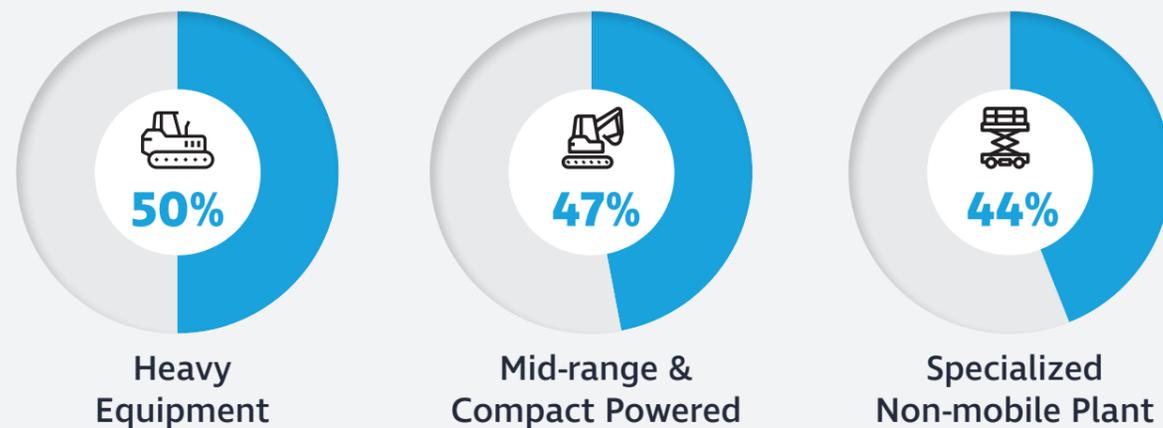
These findings suggest that a considerable portion of fleet investment is not consistently generating productive output, potentially driving unnecessary capital expenditure, increased maintenance overhead and avoidable rental charges. It also often reflects broader challenges in fleet planning, asset allocation, and cross-project visibility, particularly in complex or multi-site operating environments where equipment demand can fluctuate rapidly.

This level of underutilization reinforces the importance of rightsizing fleets using real-time utilization data rather than relying solely on procurement forecasts, historical demand patterns, or project-based assumptions, and as a result, those organizations that align fleet composition more closely with real-time usage trends are better positioned to reduce excess capacity, improve asset redeployment and drive more efficient long-term equipment investment strategies.

## % of equipment is underutilized (Standing unused for >50% of the time)



## % of assets idling unnecessarily for over 25% of the total engine on time





# More than 25% of engine-on time is idling

## Non-productive Idling and Avoidable Productivity Loss

Non-productive idling continues to represent one of the most measurable and addressable drivers of utilization loss, with approximately half of respondents reporting that unnecessary idling accounts for more than 25% of total engine-on time across powered equipment categories.

Encouragingly, organizations with higher levels of real-time utilization data, demonstrate lower engine idle times. Operators with live data from over 75% of their assets are up to 2.6x more likely to achieve lower engine idle times, when compared to fleets with live data from <25% of their assets.

This suggests that accurate, real-time performance monitoring plays a critical role in identifying inefficient usage patterns, reinforcing operator accountability and enabling more proactive asset management and scheduling decisions.

# Is Utilization Monitoring the Gold Star?

The findings also position idling reduction as a high-impact, relatively low-complexity opportunity for improving equipment productivity and ROI, particularly as reducing unnecessary engine run time can significantly lower fuel consumption, minimize avoidable wear and maintenance costs and improve overall equipment availability.

What's more, reducing idle time can also extend overall asset lifespan, support more accurate maintenance planning and contribute to broader sustainability objectives by lowering emissions and overall fuel usage across fleet operations, to name but a few operational benefits.

**Fleets with live data are more likely to achieve lower engine idling by**  
**2.6x**



**Non-productive idling significantly contributes to underutilization.**

Agree  
**78%**



Disagree  
**17%**



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# 27% of fleets frequently rent or buy additional equipment due to downtime

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## Maintenance Driven Downtime and Reactive Capacity Spending

Maintenance is an operational challenge and a frequent contributor to project delays across all equipment categories, often driven by aging assets, servicing schedules and limited visibility into real-time equipment condition.

These challenges often make it difficult for organizations to accurately forecast equipment availability and can therefore increase the risk of unplanned downtime or operational disruption, and perhaps unsurprisingly, the data shows that heavy equipment fleets are most significantly affected, with 32% of respondents reporting that maintenance requirements frequently disrupt project timelines, likely due to the higher complexity and more critical dependency associated with these asset types.

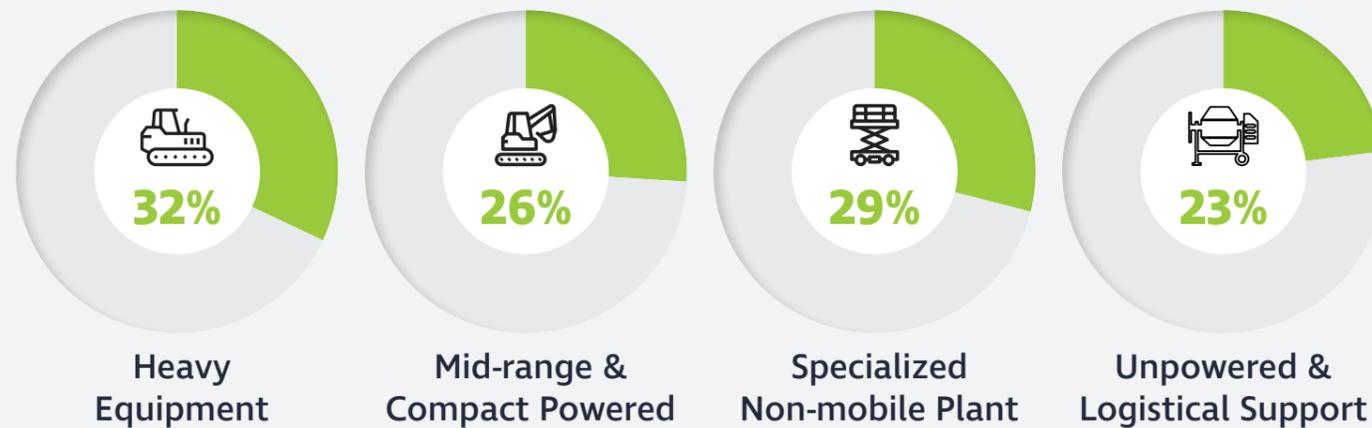
# Predicting Equipment Demand

Though any impact of downtime can extend well beyond scheduling disruption, as when critical equipment becomes unavailable, organizations are often forced to source short-term replacements to maintain productivity and meet project deadlines. As a result, 27% of organizations report that they frequently rent or purchase additional equipment to compensate for unavailable assets, highlighting the extent to which maintenance-related downtime can drive reactive capacity decisions.

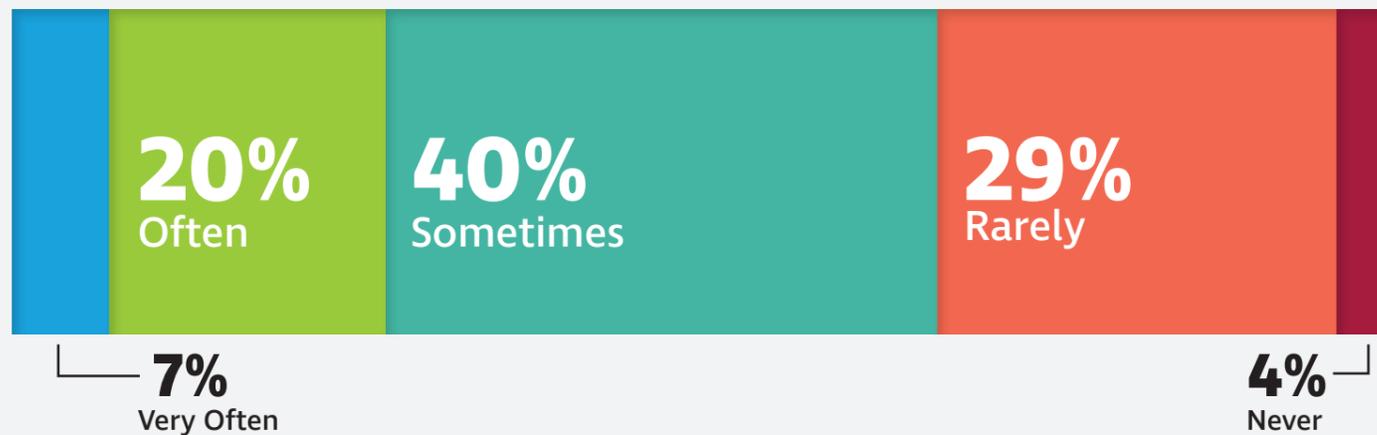
This reactive approach can significantly increase operating costs while also contributing to longer-term fleet inefficiencies, including unnecessary asset duplication, excess capacity and reduced visibility into true utilization performance – all of which reinforces the importance of transitioning toward preventive and predictive maintenance strategies supported by integrated utilization monitoring and work order management systems.

## How often do maintenance requirements cause delays to projects or operations?

(% where disruption is frequent)



## Additional assets rented or purchased due to unplanned downtime



# 67% of fleets experience equipment hoarding

## Equipment Hoarding and the Visibility Gap

Equipment hoarding is widespread across fleet operations, with 67% of organizations reporting that assets are held onsite but unused at least sometimes - a behavior which is most commonly driven by operational uncertainty and maintenance related delays, rather than deliberate over allocation.

In many cases, project managers choose to retain their equipment as a safeguard against potential schedule changes, unplanned breakdowns or difficulties in securing replacement assets at short notice, particularly in high pressure or time sensitive project environments. Though in terms of primary causes for such hoarding, waiting for maintenance is cited by 56% of respondents and project scheduling uncertainty by 52%, which suggests that hoarding is often an unplanned consequence of maintenance scheduling or a lack of predictability, therefore an expense that can be reduced with effective processes and predictive maintenance technologies.

# Unlocking Dormant Fleet Value

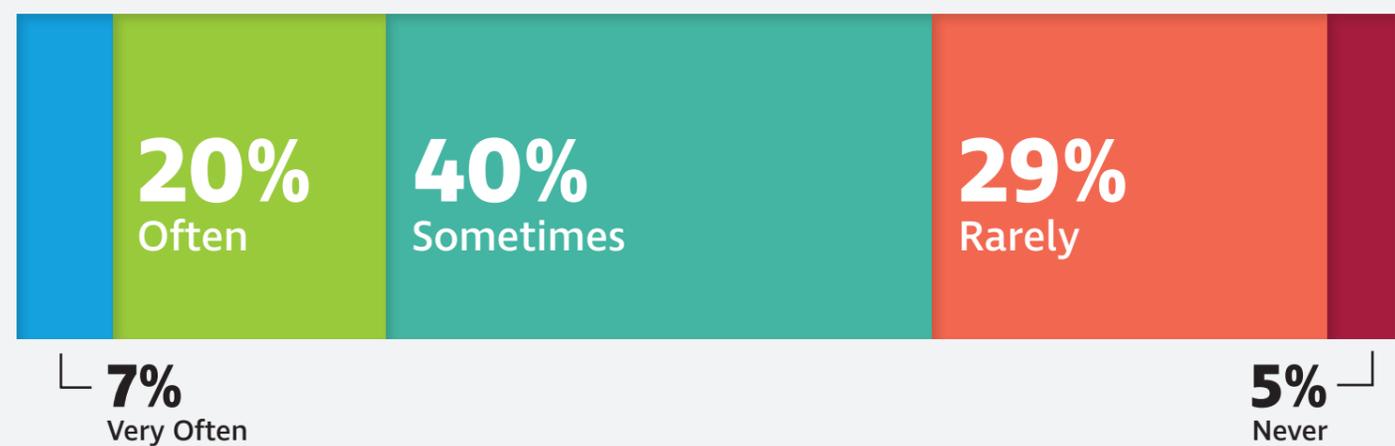
While equipment hoarding may provide short term operational reassurance, it also increases idle capital costs, reduces asset availability across wider fleet operations and often results in unnecessary rental or procurement activity when other parts of the business experience equipment shortages.

Over time, this can distort fleet utilization data, inflate cost of ownership and limit organizations' ability to make confident fleet sizing decisions, which is exactly why addressing hoarding requires improvements beyond simple asset tracking, but more a combination of real-time visibility, predictive maintenance planning, standardized utilization metrics and stronger cross project coordination.

## What are the main reasons for equipment hoarding?



## Equipment is held on site without being actively used



# The Expert View: Why Data is Reshaping Construction Performance

## ***What does “good” look like when organizations move from basic equipment visibility to meaningful utilization optimization?***

Good utilization starts when organizations move beyond simply knowing where equipment is, to clearly understanding how it’s actually being used - and whether that use makes economic sense. At that point, utilization becomes a decision making tool, not just a reporting metric. Organizations can see which assets are working productively, which are sitting idle, and which are burning fuel without delivering real value. When that visibility is trusted, teams can confidently decide whether to redeploy equipment, offload underused assets, or invest in more of the machines that are genuinely in demand. Ultimately, “good” looks like utilization data directly shaping fleet size, project planning, maintenance schedules, and capital decisions.

## ***What risks do organizations face when they rely on a mix of digital and manual utilization tracking?***

The biggest risk is confidence, or lack of it, in the data. Manual logs are prone to error, interpretation, and inconsistency, especially under time pressure. When manual records don’t align with digital data, teams often fall back on what feels familiar rather than what’s verifiable. That creates blind spots, slows decision making, and undermines trust in the technology itself. It also introduces inefficiencies, because staff spend valuable time reconciling conflicting information instead of acting on it. Without a single, reliable source of truth, utilization data loses its ability to drive real operational change.

*James French*

**James French**

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## ***How should organizations think about improving data consistency over time?***

Improving data consistency starts with clarity around what information actually matters and who needs it. Organizations should define the utilization metrics they want to track, configure reports accordingly, and validate the integrity of that data early on. Once confidence in the data is established, consistency comes from habit - automated reports delivered regularly, reviewed by the right people, and used to inform everyday decisions. Over time, as teams see the data repeatedly reflect real-world conditions, reliance on manual tracking naturally fades and digital data becomes the default.

## ***What are the most common causes of fragmented equipment data, and what practical steps can be taken to improve data accessibility?***

Fragmentation typically occurs when multiple systems operate independently and information isn’t shared widely across the organization. In many cases, knowledge also sits with just one or two individuals, creating gaps when roles change. Practical steps include ensuring all relevant stakeholders are trained, clearly defining who needs access to which reports, and centralizing utilization data so it’s visible across teams. Even simple measures, like displaying utilization dashboards in shared spaces, can reinforce transparency and accountability. The goal is to make data easy to access, understand, and act on, not locked away in isolated systems or spreadsheets.

*Hunter Garris*

**Hunter Garris**

Director,  
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- United States





# Mobilizing

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## THE FUTURE OF FLEETS

### Methodology

This report is based on a quantitative online survey of 600 respondents from companies operating commercial vehicle fleets in the United States, the United Kingdom, Australia and New Zealand. The survey was managed and executed by Arlington Research, a specialist market-research agency, with responses collected via an online questionnaire in October 2025.

All percentage estimates are reported at the 95% confidence level. For the full sample, the maximum sampling margin of error is  $\pm 4.0$  percentage points.