Closing the commercial vehicle data gap

Ford PRO™

A report commissioned by Ford Pro

Introducing the research

The research was commissioned by Ford Pro and involved surveying 3,000 Commercial Van Drivers and 150 commercial vehicle fleet managers across the US, UK, Italy, France, Germany and Spain. The 3,000 Commercial Van Drivers were surveyed between 19.12.2024 and 02.01.2025.

The European research of Commercial Van Drivers was conducted by Censuswide who abides by and employs members of the Market Research Society and follows the MRS code of conduct and ESOMAR principles. Censuswide is also a member of the British Polling Council.

The US research of Commercial Van Drivers was conducted by Morning Consult. The sample of 150 commercial vehicle fleet managers was recruited by the B2B specialist NewtonX across the US, UK, Italy, France, Germany and Spain, between 30.12.2024 and 10.01.2025.

The margin of error is +/- 5 percentage points for the total audience at a 95% confidence level.

The research was analysed by Burson Data & Intelligence.

For the purposes of this report, a small business is a company that operates 1-10 vans, with medium-sized fleets being 11-50, and large fleets more than 50 vans.

Foreword

Connected vehicle data is the lifeblood of commercial vehicle efficiency. Like a fitness tracker for your fleet, it helps optimise vehicle and driver performance by providing business owners both real-time updates and cumulative data for deeper analysis and richer operational insight.

Today, accurate, real-time information direct from your fleet is invaluable for solving challenges and driving improvements to the bottom line. Think less idling; less downtime for maintenance; better route efficiency; fuel or charging savings, driver behaviour monitoring and training, and much more. Plus, the data can deliver insights about driving behaviours that reduce risk to staff and the business. Think seatbelt use; speeding; harsh braking.

But while van users and fleet managers are increasingly recognising the transformational value of this data, new research commissioned by Ford Pro reveals that a significant proportion of the commercial vehicle community are currently missing out on many of its key benefits due to concerns over data usage, understanding and trust of commercial vehicle brands and third parties. The report surveyed more than 3,000 van drivers and 150 fleet managers across Europe and the US, and what became clear is that a knowledge gap is emerging. Whilst it is understandable that there is concern among van drivers and fleet managers around data privacy - which is always the priority – the key to helping businesses overcome this is by providing the right information and education around the benefits they are potentially missing out on. Currently there is a gap which separates the savviest in our business, who have seized the opportunity presented by connected data, from those still relying exclusively on traditional management tools and not unlocking the potential of data to save time and money. As an industry, we need to close this gap – and fast.

Clearly, the security of data is a factor and in some ways a barrier to business uptake of software offerings, but, as this report explores, the story goes much deeper than that. In the pages that follow, we'll examine the root causes of this gap and the steps we need to take to close it and accelerate our collective transformation journey.

Ford Pro exists to maximise the productivity of its customers by helping to optimise the way they use their vehicles, the heartbeat of their business. A vehicle off the road is lost time and lost money for a business, which can be hugely detrimental for companies of all sizes. To combat this, we're empowering vehicle operators with the tools they need to harness the power of data for their businesses. Our Ford Pro Intelligence platform seamlessly integrates data from vehicle components, sensors, dashcams and EV chargers into fleet management software, to deliver a comprehensive overview of a fleet's operations – at a glance, around the clock.

Our mission is to make running your commercial vehicles as easy and hassle-free as possible by putting everything you need in one place. For a business to thrive, it needs to maximise the productivity and uptime of its vehicles, and this report is designed to demonstrate how data can help deliver that. I hope you find it insightful and instructive, and I look forward to working with you in 2025 and beyond.

Hans Schep
GM Ford Pro Europe

Executive Summary

The power of software and data to improve business operations and reduce inefficiencies is beyond dispute. Today, connected vehicle data is transforming both the commercial vehicle industry, and van-reliant businesses large and small, at rapid pace.

But at the same time, data privacy and security can be a contentious subject for businesses that operate vans, and van drivers themselves. As a company focused on helping businesses use connected vehicle data to do more and be more efficient, Ford Pro wanted to dig deeper.

So, we commissioned this new research to better understand how business owners and their drivers, fleet managers and operators across Europe and the US currently view their data and their perceptions about data privacy, security, and usage by brand and market. What the research found was fascinating.

The results highlight the emergence of a clear gap surrounding commercial vehicle data made up of three main components:

The value gap
While both van drivers and fleet managers globally see vehicle health as the main priority for them to keep business moving, more than a third of van drivers (46%) and a quarter of fleet managers (25%) are not tapping its potential of monitoring vehicle health data in their daily operations.

The education gap
Despite their accepted benefits, less than a third of van drivers globally, and just over half of fleet managers (57%) know ‘a lot’ about how to use telematics to save time and money. This figure drops to just one in ten for small business drivers (1-10 vehicles) globally, who are using tracking and performance monitoring half as much as larger fleet drivers.

The data privacy gap
Despite widespread connected vehicle data use, 94% of van drivers and 97% of fleet managers have data privacy and security concerns, specifically about data collection without consent (42%), sharing with third parties (40%) and data breaches (40%).

The report also explores the fundamental importance of trust by owners of small and large businesses operating vans and reveals that fleet managers and van drivers trust commercial vehicle manufacturers more with their data than they do third party fleet management services providers.

Understanding and addressing these issues will unlock the transformational opportunity of connected vehicle data. Is your business ready to take the next step?

Introduction: Building greater understanding

In 2025, connected vehicle data is powering rapid transformation right across the commercial vehicle sector.

27% growth in paid subscribers in 2024

reaching nearly

675,000

Berg Insight forecasts a big increase in active fleet management systems in Europe – from 16.3 million units in 2023 to a projected 27.6 million by 2028. This growth reflects the industry's increasing recognition of the value of connected vehicle data at a global scale as well. Ford Pro has seen a 20% growth in paid subscribers in Q1 2025, reaching nearly 675,000. Since 2023, the number of connected vehicles Ford Pro customers have on the road has increased 40% to 5.2 million.

Today's reality is that getting the most out of data and software is an exchange, as Jeremy Gould, Director, Ford Pro Intelligence, Europe, explains: "With these evolving data-driven solutions, there is a need to educate and help customers understand the value they get from data to therefore be happy to subscribe to what's on offer."

"The industry needs to better explain the true value represented by today's connected vehicle data – the opportunity is there, we just need to come together to unlock it. Our role at Ford Pro is to ensure that customers feel comfortable giving us access to their data so that they can really start to enjoy the benefits that connected vehicle data can deliver – it's a major focus for us as a business."

“Data security isn’t just a feature at Ford Pro; it’s a foundational principle.”

Security is the cornerstone
All fleet stakeholders, across businesses large and small, expect their information to be protected and in good hands. This starts with data security, and in the case of Ford Pro, robust security measures are built into software solutions to protect customers’ sensitive information from unauthorised access and misuse.

This commitment to data security is validated by ISO 27001 certification for Ford Pro software solutions. Ford Pro Telematics, Telematics Essentials, and E-Telematics are all globally recognized for information security management setting a high bar for the confidentiality, integrity, and availability of customer data.

As Gould says: “Data security isn’t just a feature at Ford Pro; it’s a foundational principle.”

Embedded technology holds the key for business
The commercial sector is moving away from aftermarket data collection hardware such as PIDs (plug-in devices) and towards OEM embedded solutions because they uniquely support vehicle health monitoring and live vehicle tracking with integrated data. Ford Pro vehicles with data gathering capabilities built in provide a greater sense of security for your data, with PIDs being easier to remove by someone wanting to steal a van or even drivers not wanting to be tracked, whilst also avoiding added cost for businesses needing to take vans off the road for hardware fitting, for example.

The embedded vehicle modems feed high quality, high fidelity vehicle data directly to the Ford Pro Intelligence platform giving fleet managers two-way control over the safety and security of their vehicles including remote vehicle lock and unlock, speed and acceleration limiters and geo-fencing. This is only possible with the embedded and integrated ecosystem provided by Ford Pro.

Beyond that, Ford Pro Intelligence also provides insightful information to support customers as they transition to electric, and helps adopters understand how to get the best out of their vehicle from charging behaviour monitoring, remote pre-conditioning and low state of charge alerts to improved overall EV performance.

Ultimately though, businesses operating vans often have varied needs for how they want to receive data, and hardware such as PIDs will allow them to collect data from their fleets where they operate more than one brand of van. Balancing and understanding the need of a business is crucial here.

Gould expands on this: “As we move towards an era of software-defined vehicles, differentiation will come more and more from software-led services. Compared to traditional telematics providers, OEMs are uniquely placed to help our customers integrate the digital world and the physical world to truly transform their operations.”

With OEMs now in pole position to drive us forward, what is holding us back?

Part One

The value gap

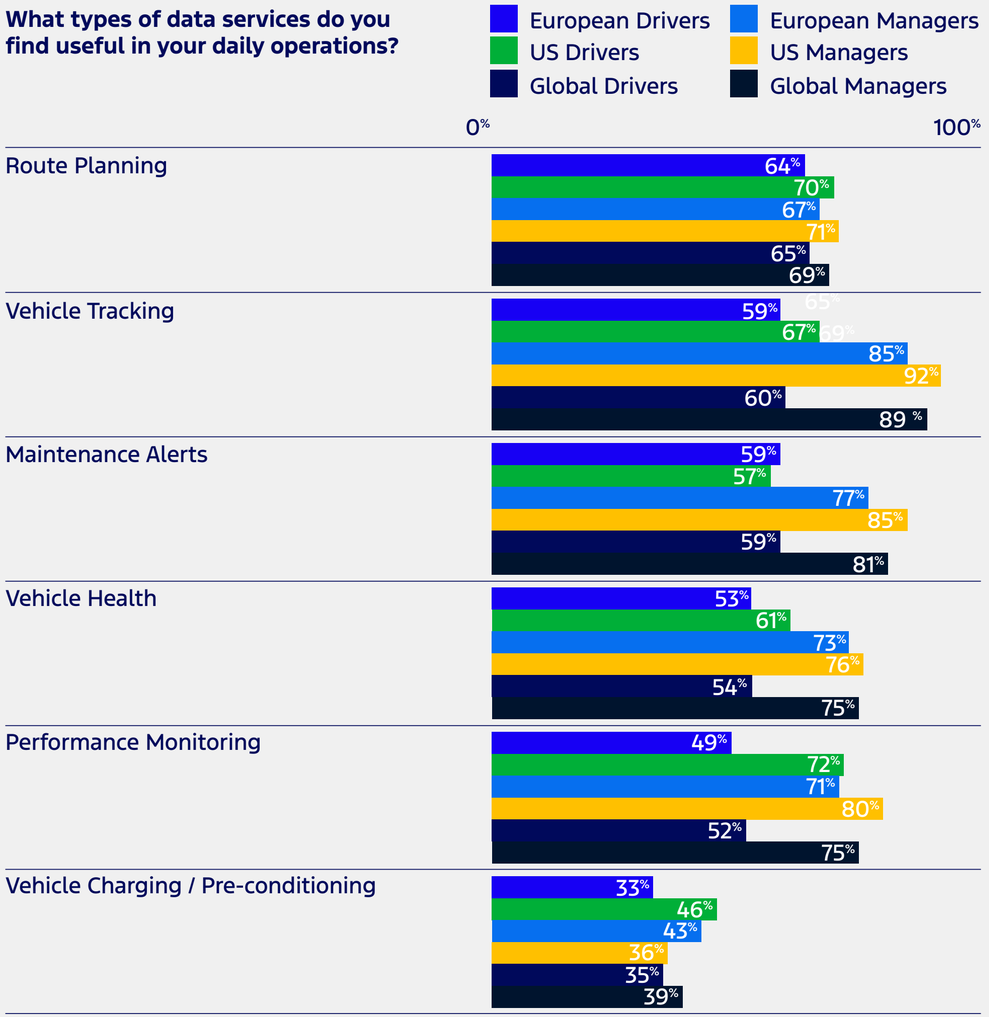
When it comes to telematics, fleet decision makers are very much on board. This has already been highlighted by the growth in subscriptions to Ford Pro telematics products globally, showing businesses are beginning to recognise the opportunity in front of them.

But there's a disconnect. Despite the fact that vehicle health is ranked as the top priority for both van drivers (53%) and managers (75%) globally – consistently outscoring route optimisation, fuel/EV efficiency and driving behaviours – 46% of all van drivers and a quarter (25%) of all managers do not monitor vehicle health data in their day-to-day operations. By contrast, when asked about the services they use most, the top responses from van drivers globally were route planning (65%), vehicle tracking (60%), and maintenance alerts (59%). Among fleet managers globally it was a similar story with vehicle tracking (89%) and maintenance alerts (81%), relating to planned and routing servicing needs, outperforming vehicle health (75%) where businesses can avoid unplanned issues and faults leading to a van being off the road unexpectedly. What has been highlighted here is that despite the fact businesses have said vehicle health is the top priority for them, they are not using vehicle data solutions to track this part of their operations, and instead prioritising other elements which are, in their opinion, less important.

This again shows there is a disconnect in the value businesses, large and small, across the globe are seeing from their data services.

In certain markets the numbers are even lower than the 54% daily driver average with France just 42% and Germany just 49%. While daily data usage is higher in the US (61%) and the UK (59%), there is still a significant shortfall.

Today's reality is that almost half of the world's commercial vehicle drivers are currently missing out on the benefits of tracking vehicle health – not to mention a quarter of global fleet managers. A single day of a van being out of action (or downtime) impacts a businesses bottom line, while Ford Pro has estimated that businesses can reduce van planned and unplanned downtime by 60% by smarter vehicle maintenance and monitoring.

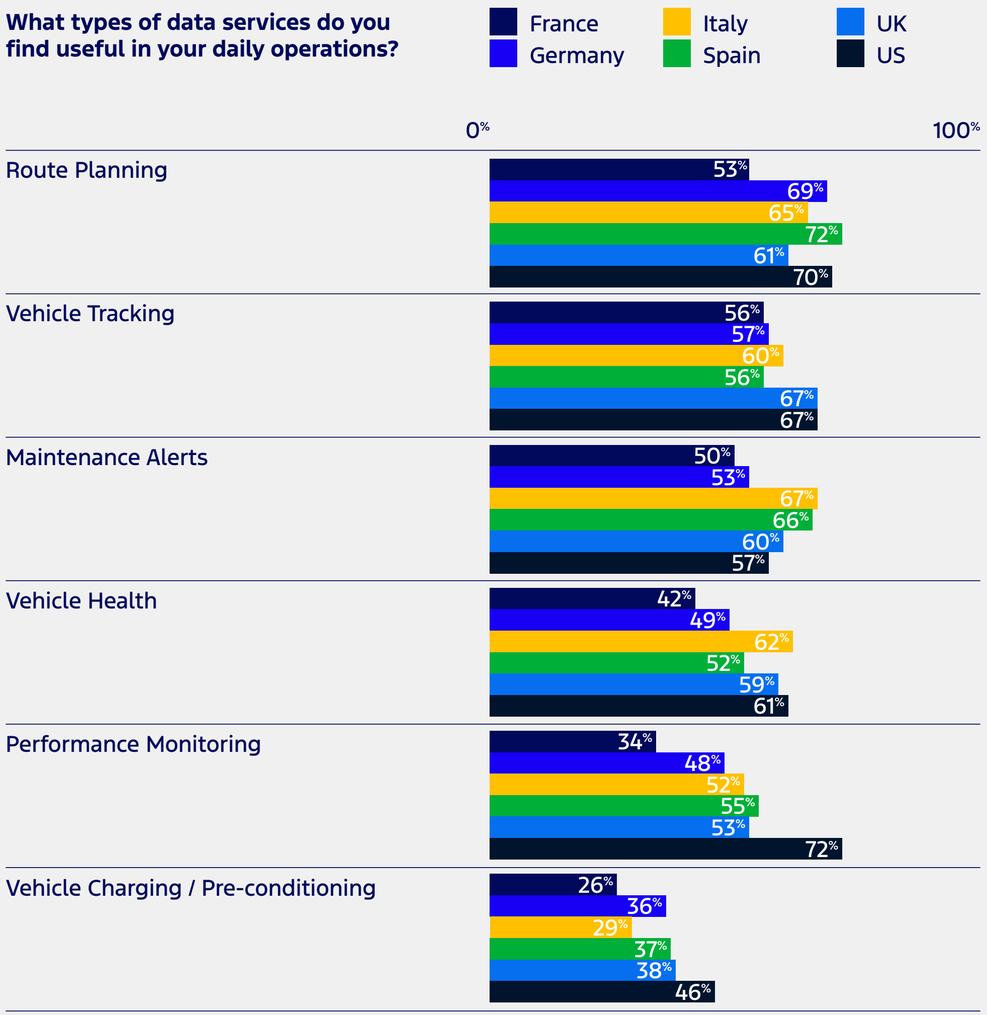


CASE STUDY

Lloyds British use their fleet of Transit Customs to provide UK industrial safety, utilising Ford Pro Mobile Service to maintain fleet productivity and ensures maximum vehicle uptime. Ford Pro's Mobile Service teams visit their engineers to repair, service, and recall their vehicles if needed at a time and location that's beneficial to their engineers – helping to save or avoid up to 60 days of van uptime across its 70-van fleet.

The gap is clear and closing it is critical, as Gould explains: "As the research demonstrates, from an awareness perspective, much of the hard work is done – we have a huge global community that understands the benefits of connected vehicle data. But a high percentage are not using it to its full potential, and that's something that as an industry we need to address.

"The truth is that, in many cases, the 'day job' is getting in the way. This is not a criticism as we fully understand that van drivers are busy and under pressure to get to the next job and reporting an issue generally leads to a short-term delay, but at the same time, ignoring the problem in front of you invariably leads to a bigger one further down the road. If the driver ends up with a bigger, more costly intervention or repair, the vehicle ends up off the road for longer than is necessary. It's a similar story for fleet managers – as small or medium-sized business owners, they're busy keeping operations running and realistically won't be able to check dashboards constantly."



Bridging the digital and physical worlds
This is where OEMs' ability to bridge the digital and physical worlds really comes into its own. In the situation outlined above, the role of the data provider is to give the customer the data to make informed decisions that will make their day-to-day easier and help prevent problems arising. The link back to the physical world of service and repair is critical here as it allows them to order parts in advance of the vehicle being taken into a dealership, thus supporting in maximising uptime and reducing downtime for work vehicles and drivers.

As Gould says: "This software to service approach means that we can be more proactive and less reactive to customer issues and, in some cases, see the issue before they do. The more providers can demonstrate the value of this in action, the more drivers and managers will be inclined to view their connected vehicle data as a daily friend, not a weekly acquaintance."

Big Gaps and Opportunities for Small Business
One stand-out finding from the research is that when it comes to telematics usage, size matters.

As suggested earlier, global telematics usage is on the rise as shown by the consistent growth in Ford Pro telematics subscriptions. However, upon closer examination a different picture emerges for small businesses and fleets. Worryingly, just 37% of small business drivers (1-10 vehicles) currently use telematics, suggesting there is still work to do there.

CASE STUDY

Dacher von Hunhold, a German construction and roofing company, would like to electrify its 13 Ford vehicles in the future, and has benefited from Ford Pro telematics since 2023 – including vehicle location tracking and health monitoring to be able to respond to different site needs.

In contrast, Ford Pro previously highlighted that 99 per cent of European businesses are small and medium enterprises (SMEs) (23 million), with commercial vehicles contributing around €1 trillion to GDP across Europe in 2023, according to its recent report with the Centre for Economic and Business Research (Cebr). Uptime and productivity benefits of connected vehicle data and software has the potential to significantly benefit business productivity and the European economy.

This context only serves to reinforce the scale of the challenge here. The 37% small business driver statistic is perhaps even more surprising when viewed against the fact that, in line with the general findings and the contributions of vans to global economies, vehicle health tops small business drivers' list of priorities. Yet if small businesses do not fully understand the full capability and saving potential telematics can offer, this represents a significant gap in education and value potential for small businesses.

There is an important job for the industry to do with small business fleets, as Gould explains:

"Awareness is a critical part of the process, but in many cases small businesses do not have a fleet manager. That's why we must provide drivers with the right data tools to manage their fleets 'on the go'. The Ford Pro Telematics Drive App is one example, but this is where we can come together better as an industry to support small and medium businesses and their fleet drivers."

Part Two

The education gap

Telematics usage across the industry is, generally speaking, at a healthy level.

But are van drivers and fleet managers getting the most out of the transformational data at their fingertips? Based on the results of the research, the short answer to that has to be ‘no’.

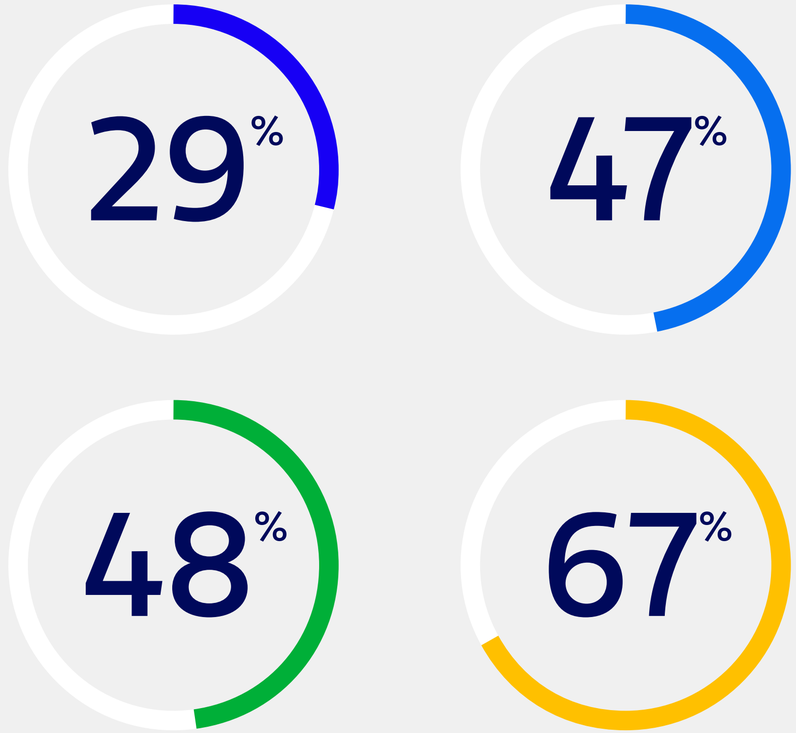
As with usage, small fleet drivers are lagging behind with just one in ten global van drivers knowing ‘a lot’. This compares to 19% of mid fleet drivers and 38% of large fleet drivers. More worryingly, over 1 in 3 (38%) small business drivers know nothing at all, compared to 18% of mid fleet drivers and 7% of large fleet drivers.

And while in Europe generally, 71% of all van drivers have a good understanding of how telematics data is collected, shared and used, this drops to less than half (42%) of small business drivers. Again, the gap is clear to see and, again, small business fleets are in danger of falling into it.

To what extent do you know how to use the data provided by the software in your vehicle to save time and money for your business?

European Drivers
European Managers
US Drivers
US Managers

I know a lot:



“Transparency around the use of data is critical... I would like to be aware of what data is visible.”

The answer is right under their eyes
Gould assesses the findings: “Firstly, the disparity between the overall van driver figure at 32% and the much bigger fleet manager figure at 57% clearly demonstrates the opportunity for the latter to upskill the former. As an industry, this is something we need to facilitate by better explaining the impact of these pioneering digital features at every level of the business.

“Traditionally, telematics has been viewed by some as a ‘Big Brother’ tool, so we need to demonstrate the value it can deliver for drivers, managers and companies at large and highlight why it is worthy of their trust. The reality is that the ability to save time in their day, run a safer fleet and achieve their sustainability goals is actually right under their eyes, they just may not realise it.

“There are so many conversations we have with our customers where they don’t know they have an embedded modem in their vehicle that unlocks all this value for them – as well as the fact that these modems have privacy features built into them. There is a market education awareness gap that we need to address because when customers realise what the technology can do there is a real Eureka moment.”

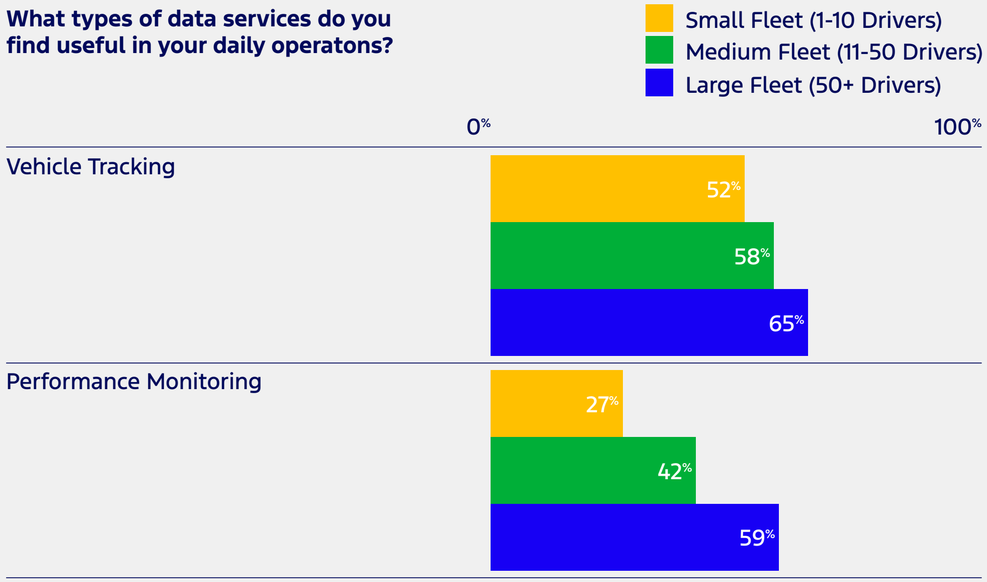
Opportunity to build on progress so far
This education gap doesn’t mean that the commercial vehicle sector isn’t embracing the benefits of connected vehicle data. Far from it.

Managing their day and vehicles are the top priorities for van drivers in Europe including route planning (64%), followed by vehicle tracking (59%) and maintenance alerts (59%). The US equivalent figures are 70%, 67% and 57%, respectively.

However, only half of European van drivers currently use telematics for preventative measures that will help them avoid planned or unplanned downtime, such as monitoring vehicle health (53%), or performance monitoring (49%) as opposed to the corresponding figures of 61% and 72% in the US.

Global fleet managers, balance the day-to-day needs with preventative measures. Vehicle tracking is a higher priority, with 89% finding it useful in daily operations, followed by maintenance alerts (81%), vehicle health (75%) and performance tracking (75%).

What types of data services do you find useful in your daily operatons?

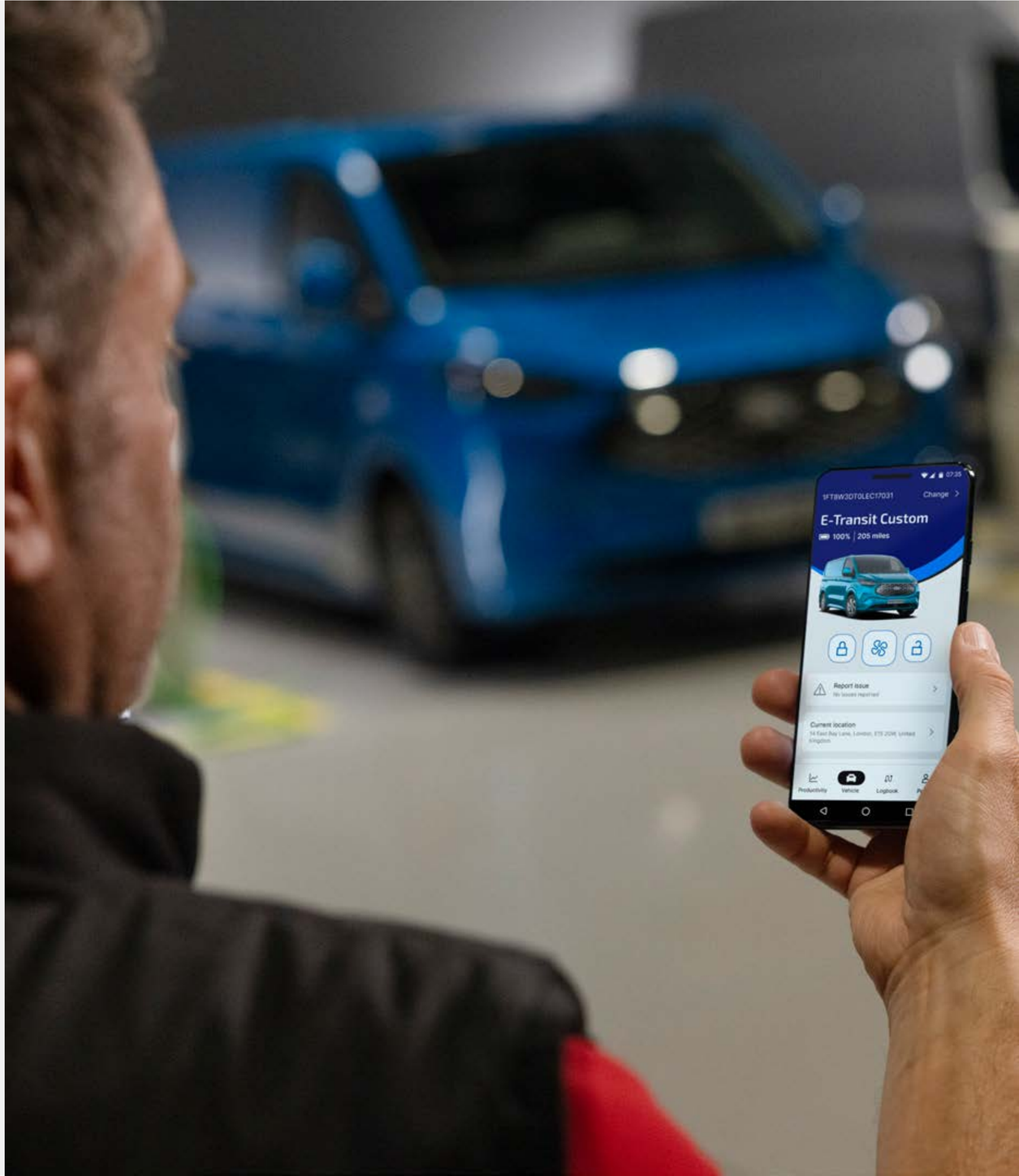


Again, small business drivers use all services less. In particular, they use vehicle tracking and performance monitoring half as much as large fleet drivers. Because they wear more hats, and have more demands on their time, connected vehicle data could help them operate more efficiently and reduce downtime.

Gould assesses the opportunity: “What these figures tell us is that the telematics door is wide open and when people walk through it, they absolutely understand the value on offer. The challenge now is for us to encourage more people to walk through it – if we can better showcase the benefits from the telematics already in use, we can start to really close the education gap highlighted by the research.”

Part Three

The data privacy gap

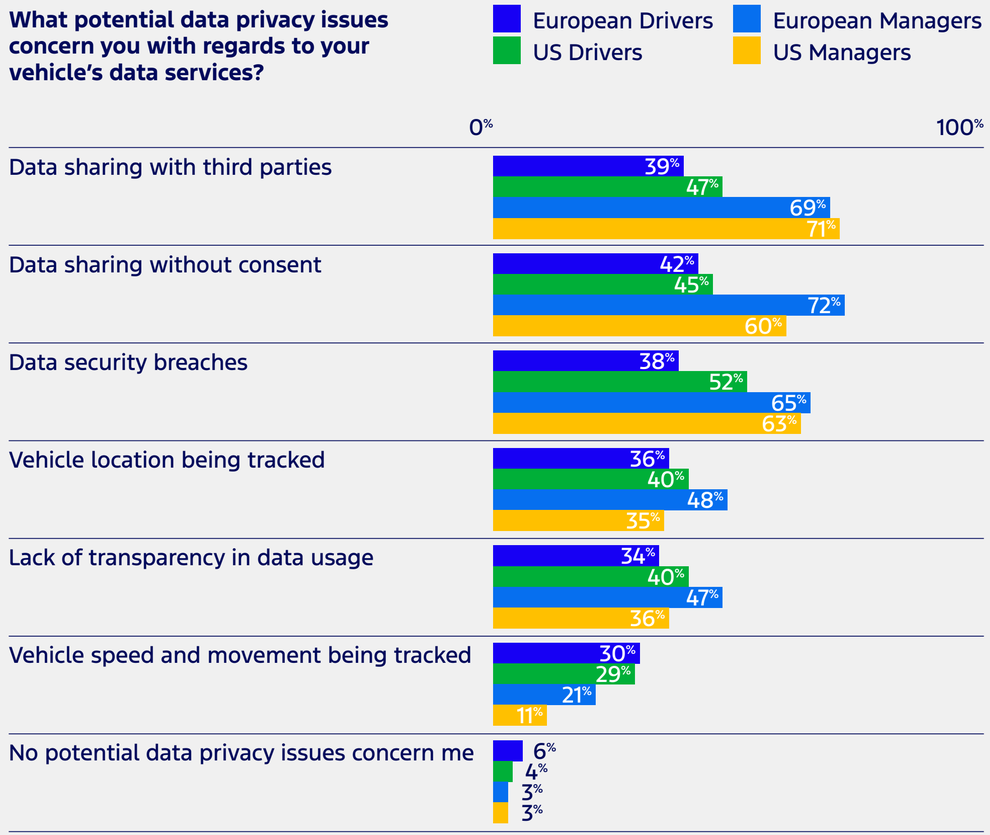


As the relentless pace of digital transformation continues to accelerate, data privacy is never far from the conversation with customers concerned about knowing how their data is managed and shared with third parties, and not fully understanding what that process looks like during the ownership experience.

So, it is little surprise that globally 94% of van drivers and 97% of fleet managers have privacy concerns surrounding connected vehicle data. Both van drivers and fleet managers have the same concerns – this being data sharing without consent (42% and 66%); sharing with third parties (40% and 70%); and data security breaches (40% and 64%).

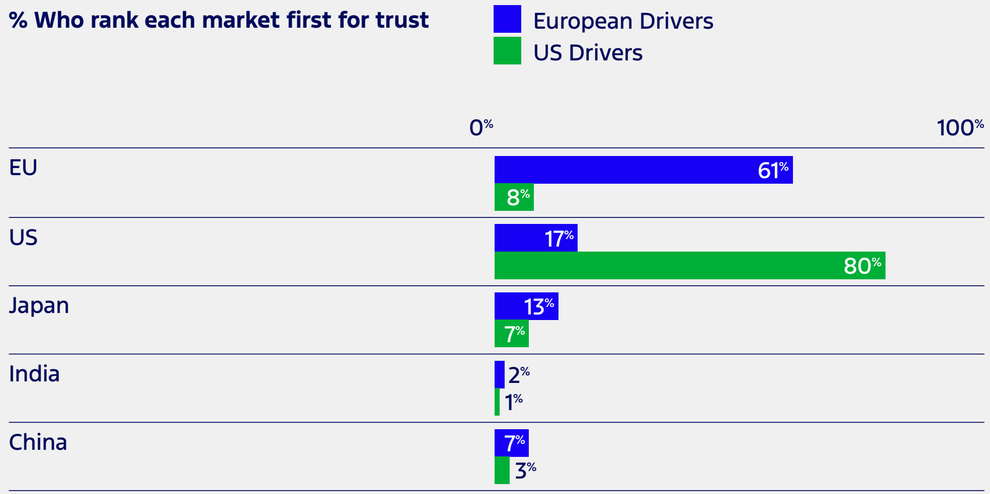
Crucially, 86% of fleet managers say that data privacy would influence their decision to continue with or switch to a different commercial vehicle brand – this figure rises to 91% for van drivers in Europe, and 88% for van drivers in the US. These numbers are broadly consistent by market and show a real challenge for OEMs: your reputation for managing and protecting data matters.

What potential data privacy issues concern you with regards to your vehicle's data services?



Interestingly, globally location tracking is less of a concern than data privacy for both van drivers and fleet managers, registering at 36% and 41% respectively compared to data sharing with third parties (40% and 70%) and data sharing without consent (42% and 66%).

“My main concern is data leakage and the potential resale of data.”



Gould points to the importance of transparency: “As the business world continues to embrace this relentless wave of transformation, it is up to companies like Ford Pro and other industry leaders to be transparent and clear about how data can help van drivers and fleet managers in their daily work and how we protect and limit its use for that purpose. The fact that 86% of fleet managers say data privacy influences their decision making the purchasing journey demonstrates that this is a major topic for them, so we need to explain it better.”

The local market effect

With data privacy concerns front of mind, it is perhaps not surprising that fleet decision makers are reassured by familiarity with companies and brands they know and trust.

The commissioned research revealed that van drivers are 22% more likely to own a commercial vehicle from a market if they are from that market. What this highlights is that the origin of a brand is also seen as important by a customer, which in a world of new entries to market from all over the globe, and with more competition than ever from new and existing brands, trust and knowledge of the brand in your market is a key deciding factor in the purchasing journey.

When it comes to data privacy, Ford is the most trusted brand versus a core automotive competitor set in the US (81%) and UK (49%) – where the company has a long commercial vehicle leadership heritage.

Among European fleet drivers, the EU is the most trusted market for data privacy (61%), followed by the US, Japan, China and India. Overall, trust in the data privacy of the van they own is highest among US van drivers and lowest in France. Globally, small business drivers generally trust all brands less with regards to data privacy.

Among fleet managers globally, vehicles produced in the EU are most highly trusted, followed by the US, with China last.

Gould adds his analysis: “When it comes to brand trust, today, customers are no longer just buying vehicles, they’re building relationships. This is far more than just a financial investment – it’s an investment in an overall solution and a partnership.”

“At Ford Pro, for example, we don’t just offer vehicles – it’s software, its services, it’s charging solutions and its finance solutions. Customers demand simplicity and like to get everything from a single provider. It’s about building partnerships and in order to do that there has to be a level of trust between the two parties. In order to deliver these services, data is becoming critical, and customers need to feel comfortable that they are sharing their data with a trusted partner.”

“This is where dealerships can play a key role having built customer relationships over many years. This connection is especially strong with small to medium fleets where there’s often been a relationship for generations and that will play an increasingly important role in where customers go for advice and source their services and solutions.”

Tracking trust

Perhaps as a result of some of these long-term relationships, fleet driver trust levels for commercial vehicles are higher than those for other data tracking devices and software.

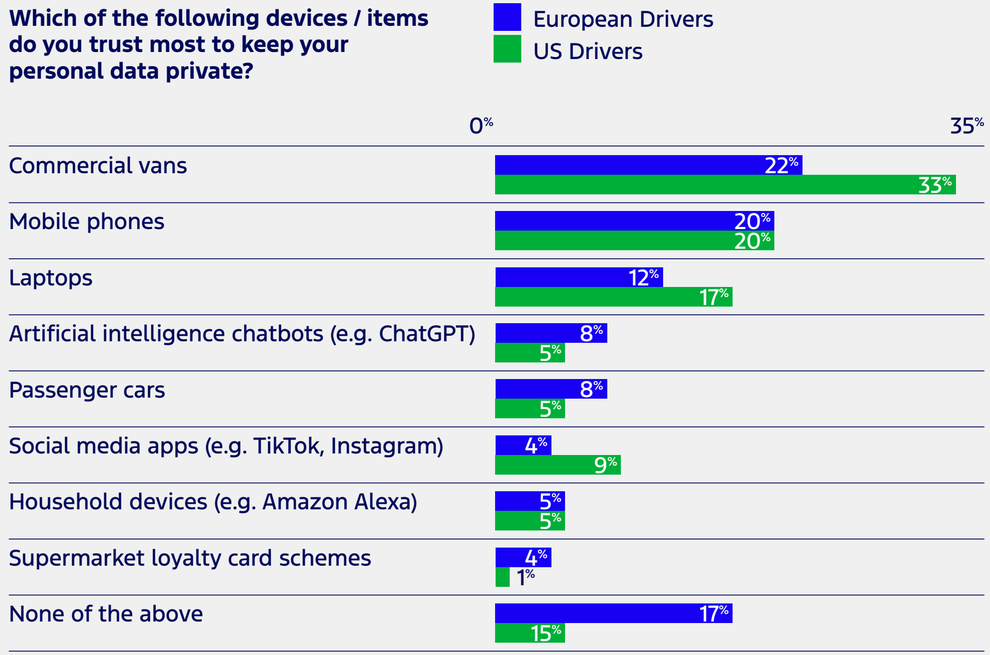
When asking van drivers how their trust for vans compares to devices used on a daily basis, such as mobile phones, laptops, AI and others, it was clear that the modest van was the most trusted by European and US van drivers. This is important because it shows that the relationship drivers build with their vehicles makes a difference for their trust not just in that vehicle to perform for them, but also to keep their data safe.

However, the picture changes among fleet managers, who perceive vans to be less trustworthy when it comes to data privacy than laptops and mobile phones which they trust most.

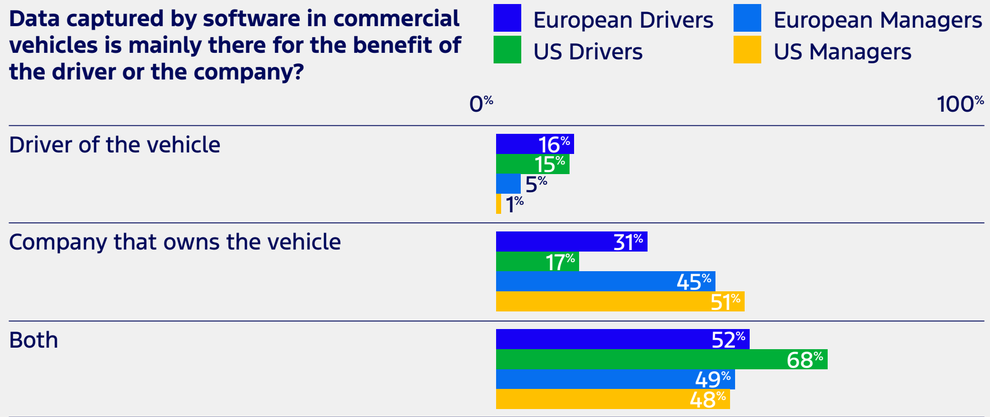
In addition, the vast majority of fleet drivers (91%) think that data privacy standards for commercial vehicles are higher or the same as for other comparable industries. This perception is slightly lower among fleet managers (78%).

There's an interesting subplot here. While we have highlighted some insight that suggests that trust issues regarding data usage still exist among those who need to be convinced of its potential, there is evidence that we as an industry are changing perceptions. This is demonstrated by 52% of van drivers in Europe and 68% in the US have acknowledged that telematics benefit both the driver and fleet company. This shows that there is an alignment that vehicle data is there to benefit them, once a driver and fleet manager have bought into its applications and fully understand the benefits these solutions bring to their business.

Which of the following devices / items do you trust most to keep your personal data private?



Data captured by software in commercial vehicles is mainly there for the benefit of the driver or the company?



Conclusion

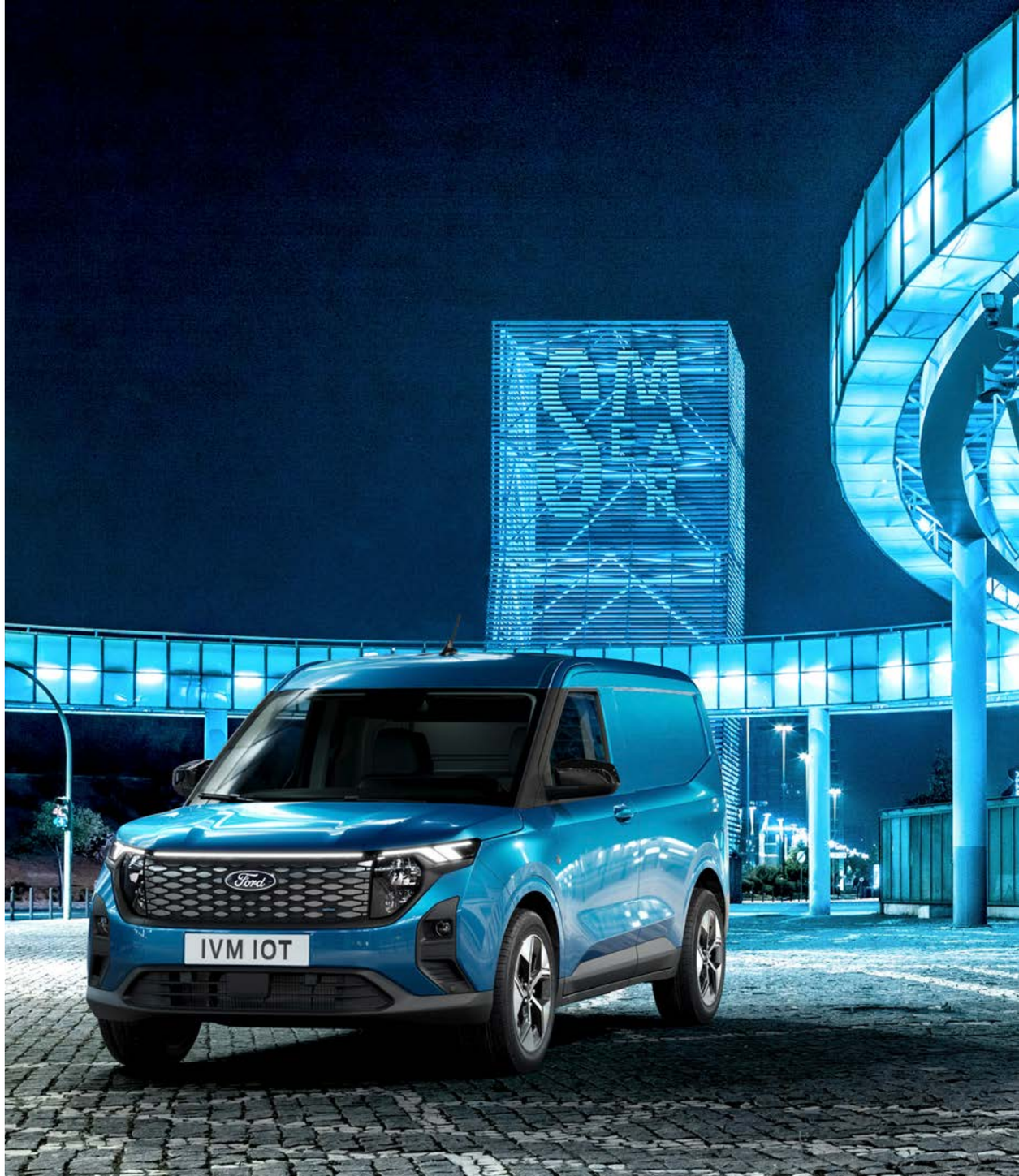
Today, we know that connected vehicle data is an invaluable tool for fleets right across the world – it is optimising vehicle and driver performance, solving challenges and driving improvements to the bottom line.

But what this new piece of research clearly illustrates is that our collective connected vehicle data journey is just getting started – the usage, education and data privacy gap highlighted in this report is currently preventing many fleet businesses from unlocking the full transformational value of their data. If we can close the gap, we can accelerate the productivity of businesses both large and small by educating them on the value of connected vehicle data in driving uptime and the cost of downtime on their operations and profitability.

For small businesses in particular, this report has highlighted a significant gap not only in education and usage of data, but also in the value-add that data can bring to businesses running fewer vans, where every penny really counts.

As an industry, OEMs are responsible for ensuring there is no 'gap' in the value data brings to business, and to businesses also understanding that value to their operations. In addition to this, we must also ensure we close the gap between big business, large fleet adoption of data, and SMEs in Europe and globally to ensure all businesses realize the operational and productivity benefits of a connected vehicle ecosystem of software and services.

As technology continues to evolve at rapid pace, connected vehicle data will have an even greater role to play, so the time to put data-driven solutions at the heart of your business is now. As Jeremy Goud says: "I see a world in which every vehicle is connected, and every fleet is using software more and more to run their business." That world is fast approaching, and 2025 is the moment to embrace it.



About Ford Motor Company

Ford Motor Company (NYSE: F) is a global company based in Dearborn, Michigan, committed to helping build a better world, where every person is free to move and pursue their dreams.

The company's Ford+ plan for growth and value creation combines existing strengths, new capabilities and always-on relationships with customers to enrich experiences for customers and deepen their loyalty.

Ford develops and delivers innovative, must-have Ford trucks, sport utility vehicles, commercial vans and cars and Lincoln luxury vehicles, along with connected services.

The company does that through three customer-centered business segments: Ford Blue, engineering iconic gas-powered and hybrid vehicles; Ford Model e, inventing breakthrough electric vehicles along with embedded software that defines exceptional digital experiences for all customers; and Ford Pro, helping commercial customers transform and expand their businesses with vehicles and services tailored to their needs.

Additionally, Ford provides financial services through Ford Motor Credit Company. Ford employs about 171,000 people worldwide. More information about the company and its products and services is available at corporate.ford.com.