Barriers to Alternative Fuels Fleet Manager Survey Summary

Q1 – What Type of Fleet do you Manage?

* Most respondents (63%) manage private/corporate fleets
* Municipal fleets (25%)
* State fleets (12%)

Q2 – Which State is your fleet headquartered in?

* Most in New England (88%) which includes Massachusetts, Connecticut, Maine, Rhode Island, and New Hampshire
* 69% of respondents are headquartered in Massachusetts
* 6% are headquartered in Maryland
* 19% have more than one corporate office

Q3 – Does your Organization Have a Sustainability Program/Initiative in Place?

* 56% of respondents have a sustainability initiative in place
* 31% do not
* 13% are in the process of building one

Q4 – As the Fleet Manager, are you Required to Adhere to Specific Sustainability criteria?

* 44% of respondents are required to adhere to sustainability criteria
* 56% of respondents are not required
* Requirements include:
  + “Measure Co2 emissions and MPG”
  + “Vehicles must average 22MPG”
  + “75% of all replacement vehicles should be driven by some type of alternative fuel”
  + “State mandate for certain # of hybrids in the state fleet by 2018”

Q5 – What Type of Alternative Fuel Vehicles/Fuels does your Fleet Use? Note: fleets may be using more than one alternative fuel

* 63% use hybrids
* 56% use flex fuels
* 38% use battery electric
* 25% use natural gas
* 19% use plug-in electric
* 13% use propane
* 6% aren’t using an alternative fuel
* No one is using fuel cell

Q6 – For each AFV:

* Do you plan to continue using the alternative fuel vehicle? What is the biggest benefit? What is the biggest drawback?
  + HEV
    - Most of those that use HEVs will continue to use
    - Biggest benefit is fuel mileage/fuel savings
    - Biggest drawback is costs/price of vehicle
  + Flex Fuels
    - Most who use flex fuels will continue to use
    - Biggest benefit is availability
    - No major drawbacks (one respondent noted “infrastructure”)
  + PEV
    - Those who use PEVs are split in terms of their continual use
    - Biggest benefits are mileage/range and burns a cleaner/cheaper fuel
    - Biggest drawback is charging infrastructure
  + BEV
    - Those who use BEVs are split in terms of their continual use
    - Biggest benefits are image, lower fuel cost
    - Biggest draw backs are range and charging availability
  + CNG
    - Those who use CNG are split in terms of their continual use
    - Biggest benefit is fuel price
    - Biggest drawbacks were not enough CNG filling sites and conforming to repair shop upfit regulations
  + Propane
    - Most who use propane will continue to use propane
    - Biggest benefit is its low infrastructure cost
    - Biggest drawback is the high cost for vehicle conversion
  + Fuel Cell
    - Of those who use Fuel Cell, none will continue to use it
    - No benefits noted
    - Biggest drawback is the limited availability

Q7 – Is there an AFV you do not currently use in your fleet but are considering using in the future? Why haven’t you implemented the use of this Fuel?

* 25% want to add some kind of electric vehicle (includes hybrids); concerned with lack of infrastructure and high prices
* 25% want to add flex fuel; concerned with high up charges, don’t have in house CNG repair facility, or no infrastructure available
* 13% want to add fuel cell; waiting for better infrastructure/increased availability
* 38% are not considering adding a different AFV to their fleet

Q8 – What are you attempting to change regarding the use of AFVs in your organization but are getting resistance from other stakeholders, drivers, or management?

* Resistance includes
  + Costs associated with up fit and maintenance
  + Range of vehicles
  + Not enough charging/refueling stations
* 50% of respondents are facing no resistance

Q9 – Would you consider using a Fuel Cell Vehicle if funding for the unit was available?

* Most respondents (56%) said yes
* 25% respondents said no
* 13% of respondents said maybe, so long as range capabilities increased

Q10 – Do you improve existing vehicle efficiency by educating drivers on best driving habits to conserve fuel?

* 75% of respondents said yes
* 25% said no
* Idle reduction training is huge; anti-idling devices when vehicles are replaced; communication through articles, newsletters, quarterly meetings, Emails, trainings, etc.

Q11 – Does your fleet conserve fuel by car-pooling, telecommuting, reduced work week, etc?

* Majority of respondents (69%) answered no
* 31% of respondents answered yes

Q12 – Do you use GPS technology with your fleet?

* 50% of respondents said some of their fleet uses GPS technology
* 44% said none of their fleet uses GPS technology
* 6% said all of their fleet uses GPS technology

Q13 – Has your fleet established a no-idling policy?

* Respondents were split 50/50 in regards to having an idling policy
* When asked why or why not, two respondents said they faced difficulty enforcing anti-idling policies in their fleet

Q14 – What are the barriers to using Alternative Fuel Vehicles in your fleet in the future?

* Infrastructure cost and range anxiety related to EVs were the majority (81%)
* Fuel Availability followed at 63%
* A quarter of respondents said management support (25%)
* Fuel Cost was the least voted for, at 19%

Q15 – If your fleet uses alternative fuel vehicles, do you receive any recognition from your corporate office, local community, or any other entity?

* Majority of respondents said no (69%)
* 31% said yes
* One respondent noted this comes from the Mayor’s Office/Environment Dept.

Q16 – Additional Comments

* “Underlying barrier is cost of the vehicle”
* “Fuel savings did not out-way additional cap cost”
* “Would like to see more funding going forward to help up fit repair shops to support new vehicles”