

Charged, But in the Dark.

Fleets are electrifying faster than they can see. A survey of 284 fleet and operations leaders reveals the data gap quietly stalling the EV transition — missed routes, spreadsheet chargebacks, and purchase decisions made on instinct instead of intelligence.

Based on a survey of 284 fleet and operations leaders at organizations running or piloting EVs in fleets of 50+ vehicles, conducted April 2026 by an independent third-party research firm.

29%

of fleets running EVs can see state of charge across their entire electric fleet in one system.

44%

had at least one EV miss or abort a route in the past six months due to an unexpected charge shortfall.

57%

have delayed or scaled back planned EV orders, citing gaps in utilization and cost data.

EXECUTIVE SUMMARY

The EV Transition Has a Visibility Problem, Not a Willpower Problem

Fleet electrification is no longer a question of if. Among the 284 fleet and operations leaders we surveyed — all running or piloting electric vehicles — EVs already make up 18% of the average fleet, and respondents expect that share to reach 37% by 2028.

But adoption has sprinted ahead of operations. Only **29% of fleets can see state of charge across their whole electric fleet in one system**. The rest are managing million-dollar electrification programs through OEM apps, charging-network portals, and driver text messages — a patchwork that behaves nothing like the unified telematics view they built for their gas vehicles over two decades.

The consequences are no longer hypothetical. **44% of fleets had an EV miss or abort a route in the past six months** because a vehicle didn't have the charge everyone assumed it did. Fleets experiencing charge surprises average 4.1 unplanned vehicle swaps per month — each one a scramble that erodes the internal case for the next tranche of EVs.

The financial picture is blurrier still. **61% of fleets track EV charging costs in spreadsheets**, 53% have no formal process for reimbursing home charging, and only 22% can split charging spend across depot, home, and public locations. The result is predictable: 68% of leaders say they lack the utilization and total-cost data to confidently plan their next EV purchase — and **57% have delayed or scaled back EV orders because of it**.

Yet the study also found a way through. The 29% of fleets with unified, vehicle-native EV data report 23% lower cost per mile on their EVs, dramatically higher purchase confidence, and an electrification pace 2.6× faster than their peers. The fleets that can see are the fleets that scale.

18% → 37%

average EV share of fleet
today vs. expected by 2028

4.1

unplanned vehicle swaps per
month among fleets hit by
charge surprises

61%

track EV charging costs in
spreadsheets

2.6×

faster electrification pace
among data-ready fleets

FINDING 01

Adoption Is Doubling. Visibility Isn't Moving.

Electrification targets are being met with real purchase orders: EVs now represent **18% of the average surveyed fleet**, and leaders expect **37% by 2028** — a doubling in under three years. What isn't doubling is the ability to operate them. Just **29% of fleets have fleet-wide state-of-charge visibility in a single system**; 47% check individual OEM or charging apps vehicle-by-vehicle, and 24% rely primarily on drivers to report charge levels.

The Adoption–Visibility Gap

N=284 FLEET & OPERATIONS LEADERS · APRIL 2026

EV share of fleet — today



EV share of fleet — expected 2028



Have fleet-wide state-of-charge visibility in one system



Remaining fleets: 47% check per-OEM/charging apps · 24% rely on driver reports

WHY THIS MATTERS

Fleets spent twenty years building a single pane of glass for combustion vehicles — then bought EVs that don't show up in it. Every point of EV share added without unified visibility widens the operational blind spot. At 18% EV share the gap is an annoyance; at 37% it becomes the fleet's dominant operating risk.

"I can tell you the fuel level of every gas truck from my desk. For the EVs, I text the drivers. That's the whole system."

FLEET OPERATIONS MANAGER · REGIONAL UTILITY · 640 VEHICLES

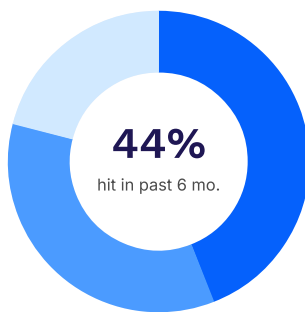
FINDING 02

Charge Surprises Are Now an Operational Event, Not an Anecdote

Ask a fleet leader about range anxiety and they'll tell you it belongs to drivers. The data says otherwise: it has moved up the org chart. **44% of surveyed fleets had at least one EV miss or abort a route in the past six months** because the vehicle's actual charge didn't match what the plan assumed. Among those fleets, the disruption is routine — an average of **4.1 unplanned vehicle swaps per month**, each requiring a spare vehicle, a re-dispatch, or a missed commitment.

Fleets Reporting a Charge-Related Missed or Aborted Route, Past 6 Months

N=284 · SHARES SUM TO 100%



■ At least one missed/aborted route — **44%**

■ Near-misses only (caught before dispatch) — **35%**

■ No charge-related disruption — **21%**

Affected fleets average 4.1 unplanned vehicle swaps per month.

WHY THIS MATTERS

Every unplanned swap does double damage: it burns operational slack today, and it hardens skepticism about the next EV purchase tomorrow. Notably, the problem is rarely the battery — it's the information. In 79% of reported incidents, the vehicle had been charged less than planned, unplugged early, or was reporting charge data no one was watching.

"The van had 31 miles of range at 6 a.m. The route was 58. Nobody knew until the driver called from the side of Route 9."

DIRECTOR OF OPERATIONS · LAST-MILE DELIVERY FLEET · 210 VEHICLES

⚙️ FINDING 03

The Most Advanced Vehicles in the Fleet, Managed by the Least Advanced Tool in the Office

EVs are rolling software platforms that report state of charge, charging sessions, and energy consumption in real time. And yet the dominant financial system for fleet electrification in 2026 is Microsoft Excel. **61% of fleets track EV charging costs in spreadsheets**, assembled monthly from charging-network invoices, utility bills, and driver expense reports.

How Fleets Manage EV Charging Economics Today

N=284 · MULTI-SELECT

Track charging costs primarily in spreadsheets



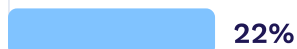
Have no formal home-charging reimbursement process



Reconcile charging invoices manually every month



Can split charging spend by depot / home / public



WHY THIS MATTERS

The spreadsheet isn't just slow — it's blind to the question that decides EV economics: *where* the electrons came from. Depot charging can cost a third of public fast charging, but only 22% of fleets can separate the two. Without location-level cost data, "our EVs are expensive" and "our charging behavior is expensive" are indistinguishable — and the EV takes the blame.

FINDING 04

The Data Gap Has Started Cancelling Purchase Orders

The clearest signal in this study is also the most expensive one. **68% of fleet leaders say they lack the utilization and total-cost-of-ownership data to confidently plan their next EV purchase** — they cannot say which routes suit EVs, which duty cycles drain batteries fastest, or what their EVs truly cost per mile. And uncertainty behaves the way it always does in a budget cycle: **57% have delayed or scaled back planned EV orders**, citing data gaps rather than vehicle performance as the reason.

Confidence and Consequences in EV Purchase Planning

N=284

Lack the utilization / TCO data to confidently plan the next EV purchase



Have delayed or scaled back planned EV orders due to data gaps



Confident in the data behind their next EV purchase



WHY THIS MATTERS

Electrification programs don't usually die in a dramatic board vote — they die in deferral. "Let's revisit next quarter" is the sound of a data gap compounding. The irony is sharp: the vehicles being deferred generate more decision-grade data than anything else in the fleet. The information exists. It just isn't reaching the people signing the purchase orders.

"Leadership asked me for cost per mile on the electric units versus the diesels. I gave them a range so wide it was useless, and they tabled the next order. I don't blame them."

VP OF FLEET · FIELD SERVICES COMPANY · 1,100 VEHICLES

FINDING 05

The Data-Ready Minority Is Pulling Away

The 29% of fleets with unified, vehicle-native EV visibility — state of charge, charging sessions, and energy costs in one operational system — aren't just avoiding problems. They're compounding advantages. They report **23% lower cost per mile on their EVs**, purchase confidence of **81% versus 12%** among their app-juggling peers, and an electrification pace **2.6x faster** over the past 18 months.

Data-Ready Fleets (Unified EV Visibility) vs. the Rest

DATA-READY SUBGROUP N=82 · REMAINING FLEETS N=202

■ Data-ready fleets ■ Fleets without unified EV visibility

Confident in data behind next EV purchase



EV cost per mile vs. fleet average



Electrification pace, past 18 months



WHY THIS MATTERS

Visibility isn't a nice-to-have layered on top of electrification — it's the rate limiter. The confident 32% of the market is almost entirely explained by this group: fleets that can see their EVs buy more EVs. The gap between the two cohorts is widening every quarter, and it will be hardest on fleets that wait until 30–40% EV share to fix their data foundation.

 WHAT THIS MEANS

Move from Findings to Fleet Decisions

Five moves, drawn directly from what separates the data-ready 29% from everyone else.

1

Make State of Charge a Dispatch Input, Not a Driver Anecdote

Charge surprises hit 44% of fleets because SOC lives in apps nobody checks at 5 a.m. Pipe vehicle-native charge data into the same view dispatchers use for routing — the fix belongs in the workflow, not in another portal.

2

Retire the Charging Spreadsheet Before Your EV Count Doubles

Spreadsheet cost tracking survives at 18% EV share. It will not survive 37%. Automate the capture of charging sessions and energy costs now, while the volume is still forgiving.

3

Split Every Charging Dollar by Location — Depot, Home, Public

Only 22% of fleets can do this today, yet it's the single number that separates "EVs are expensive" from "our charging behavior is expensive." Location-level cost data turns a perception problem into a solvable operations problem.

4

Build the Cost-per-Mile Answer Before Leadership Asks the Question

57% of fleets have already delayed EV orders over data gaps. A defensible EV-vs-ICE cost-per-mile comparison, by duty cycle, is the document that keeps electrification budgets alive through review season.

5

Fix the Data Foundation at Today's EV Share, Not Tomorrow's

Every advantage the data-ready cohort holds — 23% lower cost per mile, 2.6× scaling pace — began with unifying vehicle-native data early. The cost of that fix grows with every EV added to a fleet that can't see it.

 METHODOLOGY

About This Study

This report is based on a quantitative survey of 284 fleet and operations leaders, fielded in April 2026 by an independent third-party research firm. All findings reflect self-reported data; percentages are rounded to the nearest whole number.

SAMPLE

284 respondents: fleet managers (44%), directors of fleet or operations (36%), VPs of operations/fleet (20%).

QUALIFICATION

All respondents hold decision authority over fleet operations at organizations running 50+ vehicles, and currently operate or pilot electric vehicles. Median fleet size: 380 vehicles; median EV count: 52.

GEOGRAPHY

United States (86%) and Canada (14%), spanning delivery & logistics, utilities, field services, government, and corporate fleets.

COLLECTION

Online survey fielded April 2026 by an independent third-party research firm. Screening enforced title, fleet size, and active EV operation.

 KEY METRICS ANALYZED

- EV share of fleet, current and projected (2028)
- Charge-related route disruptions and vehicle swaps
- Ability to attribute charging spend by location type
- Purchase-planning confidence and order deferrals
- State-of-charge visibility and monitoring methods
- Charging cost tracking, reconciliation, and reimbursement
- EV cost-per-mile measurement capability
- Electrification pace over the trailing 18 months

A NOTE ON SEGMENTS

"Data-ready" fleets (n=82, 29% of the sample) are defined as those reporting unified, fleet-wide visibility into state of charge, charging sessions, and energy costs within a single operational system, sourced from vehicle-native (embedded OEM) data rather than aftermarket hardware or per-network apps.

⚙ THE ROAD AHEAD

The Next Three Years of Fleet Electrification Will Be Won by the Fleets That **Can See.**

EV share is headed from 18% to 37%, and every operational gap in this report scales with it. The fleets pulling ahead didn't buy better vehicles — they built better visibility, using the data their vehicles were already broadcasting.

That data doesn't require another device, another install, or another portal. It's embedded in the vehicles themselves — across every major OEM — waiting to be unified. Insights, straight from the source.

See Your EVs the Way You See the Rest of Your Fleet

Motorq normalizes embedded telematics from 25+ automotive brands — state of charge, charging sessions, energy costs, and vehicle health — into one API, one Fleet Portal, and prioritized actions from Motorq Fuse. No hardware. Go live in hours.

[Book a Demo at motorq.com](#)

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