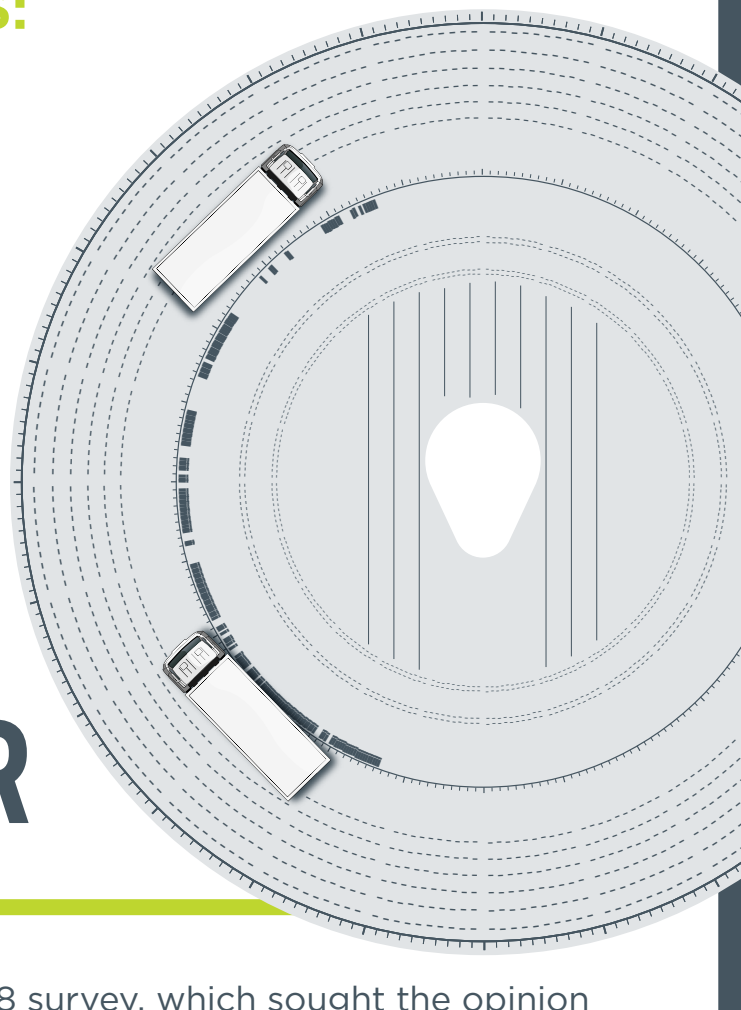




SMART BUSINESS INSIGHTS:

TACHOGRAPH DATA, BETTER DRIVING & NEW LEGISLATION IN THE EUROPEAN TRANSPORT SECTOR



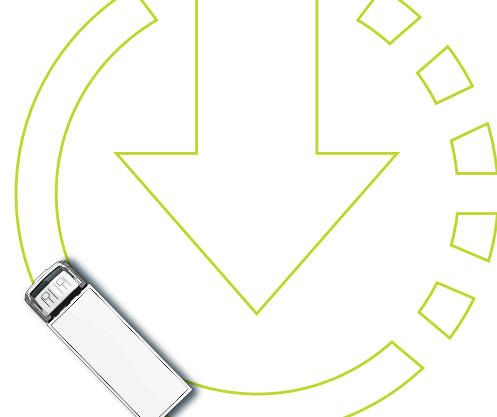
Drawing upon the results of our Transport 2018 survey, which sought the opinion of 1,200 leading transport decision-makers from across Europe, this infographic paints a clear picture of how the top operators in your industry are thinking about its most pressing concerns and planning to face down its foremost challenges.

TACHOGRAPH COMPLIANCE

How are the biggest transport players thinking about all elements related to drivers' hours regulation compliance?

1 How do you download digital tracking/tachograph data?

- Remote download (dedicated hardware): **34%**
- Remote download (telematics box): **30%**
- Manual download (USB stick): **18%**
- Don't have digital tracking data: **13%**
- Don't know: **3%**
- Other way: **2%**



While most prefer the simplicity of automated processes, the manual method remains popular in some regions:



Poland
Telematics box: **22%**
Dedicated hardware: **25%**
Manual downloads: **22%**



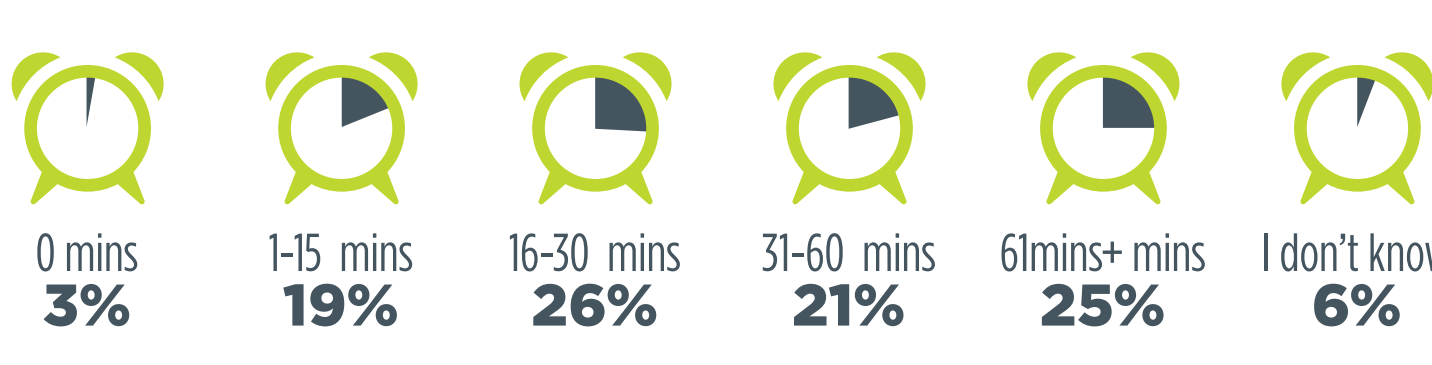
Spain
Telematics box: **19%**
Dedicated hardware: **32%**
Manual downloads: **24%**

Amongst the companies that manually download:

2 How much time per month, on average, is spent manually downloading tachograph data for each vehicle?



3 How much time per month, on average, is spent on analysing tachograph data?

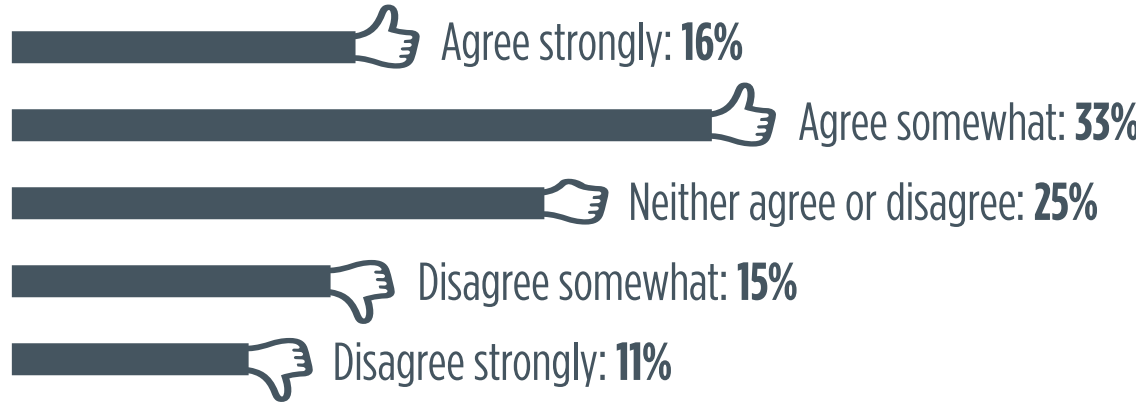


Amongst European transport companies in the last 12 months:

- 52%** have had their offices inspected for driver's hours compliance
- 43%** have been subject to roadside inspections 1-5 times
- 41%** have cancelled 1-10 jobs due to not having visibility of remaining drivers' hours for the day



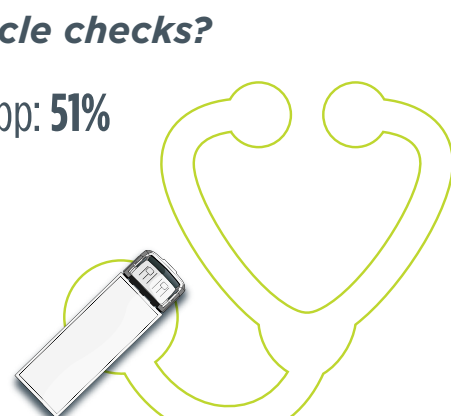
4 "The risk of prosecution is a growing concern for me"



STAYING SAFE AND REDUCING COSTS

5 How do you typically monitor vehicle checks?

- Digitally through an app: **51%**
- On paper: **36%**
- Don't know: **8%**
- Other way: **5%**

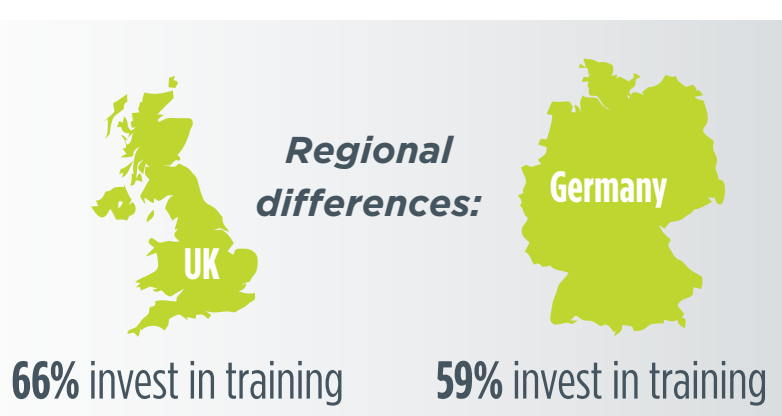


6 How do you ensure your drivers are driving safely?

- Driver training: **42%**
- Driving behaviour monitoring: **33%**
- Manager training in 1-2-1 sessions: **15%**
- Don't know: **8%**
- Other way: **5%**

7 How do you ensure your drivers take appropriate roads for their vehicles?

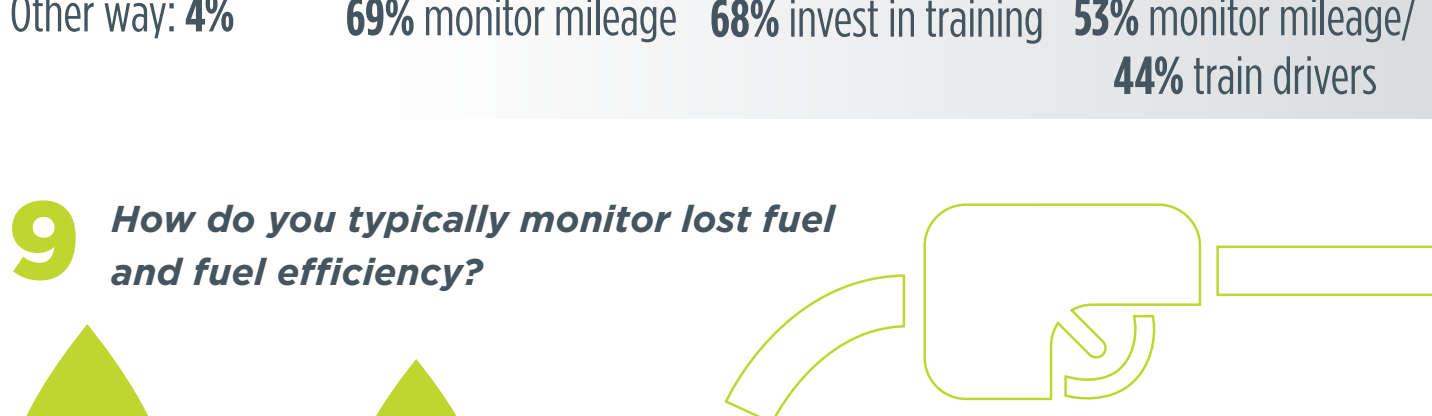
- Satnav with truck attributes: **42%**
- Training: **40%**
- I don't know: **10%**
- Other way: **5%**



8 How do you tackle fuel wastage with regards to driving behaviour?



9 How do you typically monitor lost fuel and fuel efficiency?



NEW LEGISLATION

Under the EU's new proposal, truck drivers can perform cabotage operations and still be paid according to their home country's rules for up to three days. After that, drivers will fall under local rules of the country where they deliver goods.

10 Are you in favour of this legislation?



SOLVING THE DRIVER SHORTAGE

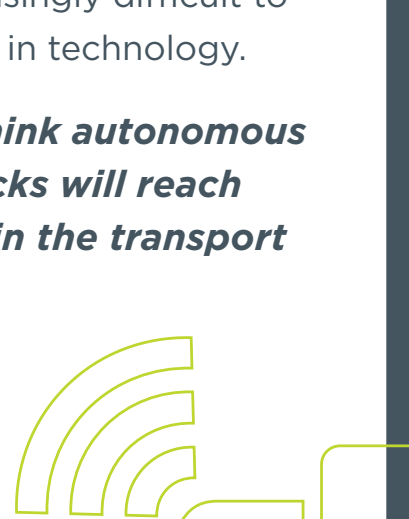
Worldwide, transport and logistics companies are finding it increasingly difficult to find qualified, reliable drivers. Some suggest the answer might be in technology.

11 "I believe autonomous self-driving trucks will solve the issue of driver shortages in the transport industry"

- Agree strongly: **15%**
- Agree somewhat: **33%**
- Neither agree or disagree: **24%**
- Disagree somewhat: **13%**
- Disagree strongly: **12%**
- Don't know: **3%**

12 When do you think autonomous self-driving trucks will reach mass adoption in the transport industry?

- 0-5 years: **7%**
- 6-10 years: **31%**
- 11-20 years: **34%**
- 21+ years: **9%**
- Never: **10%**
- Don't know: **9%**



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