

Executive

Summary

DATAFORCE ■ ■ ■
Wir zählen Autos.

Dataforce Analysis: Telematics 2018

Telematics 2018: study design

I. FleetBase®:

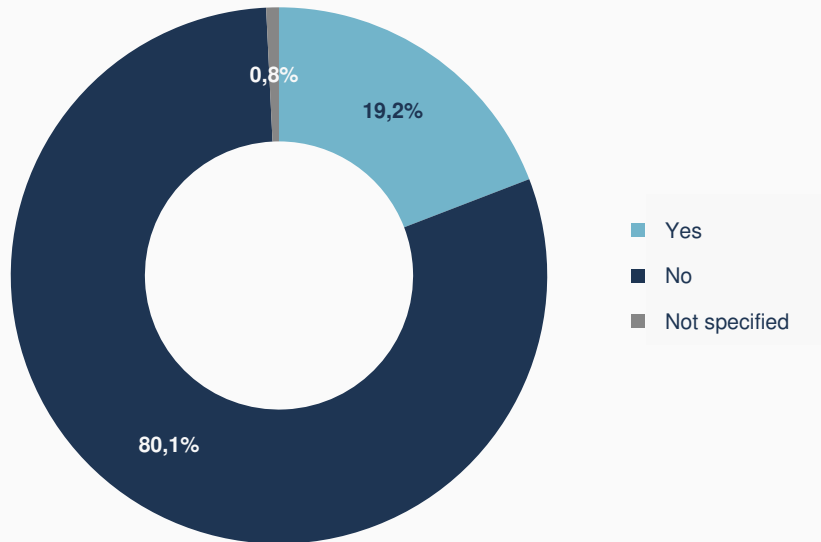
- **Methodology:** CATI, annual survey, very high number of cases
- **All fleet profiles from 2017 with at least 5 vehicles in the fleet, interviewed fleet managers: 23.857**
- **Fleet sizes: 5-9 vehicles: 10.813, 10-49 vehicles: 11.434, 50-99 vehicles: 1.067, 100+ vehicles: 543**

II. FleetInsight®:

- **Methodology:** CATI, ad hoc surveys, number of cases as needed
- **Telematics exclusive, survey period: 20/04/-18/05/2018, interviewed fleet managers: 636**
- **Driver's licence, survey period : 07/05/-23/05/2018, interviewed fleet managers: 234**
- **Pool vehicles, survey period : 11/04/-04/05/2018, interviewed fleet managers: 1.257**

Telematics usage: total

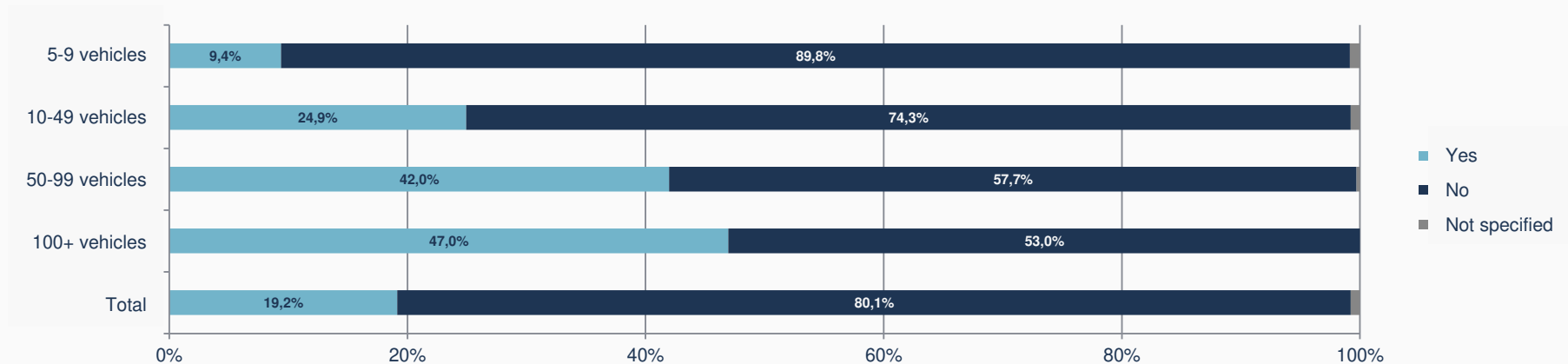
FleetBase®: Are telematics solutions used in your company?



- Although widely available, still less than 20% of the German Fleets do use 1 or more telematic solutions.

Telematics usage: by fleet sizes

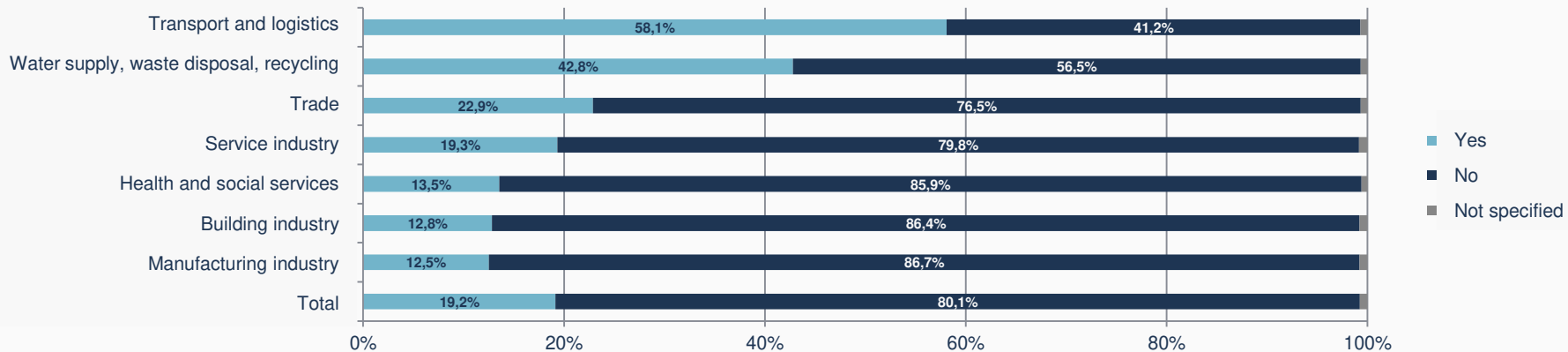
FleetBase®: Are telematics solutions used in your company?



- To no surprise, the largest penetration of telematics solution can be found in large fleets.
- As the total amount of large fleets is relative modest vs. small fleets, we see the average being dragged down.

Telematics usage: by branches

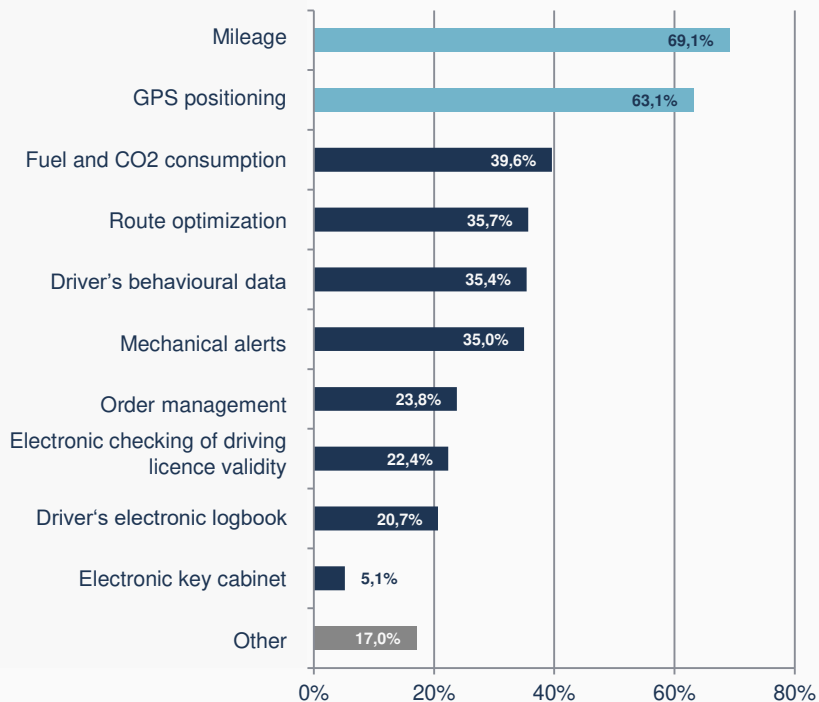
FleetBase®: Are telematics solutions used in your company?



- **Transport & logistics, which is the sector where the application of telematics makes the most sense, has also the highest penetration. The fleet size of companies are also large in this sector**

Used Telematics systems: total

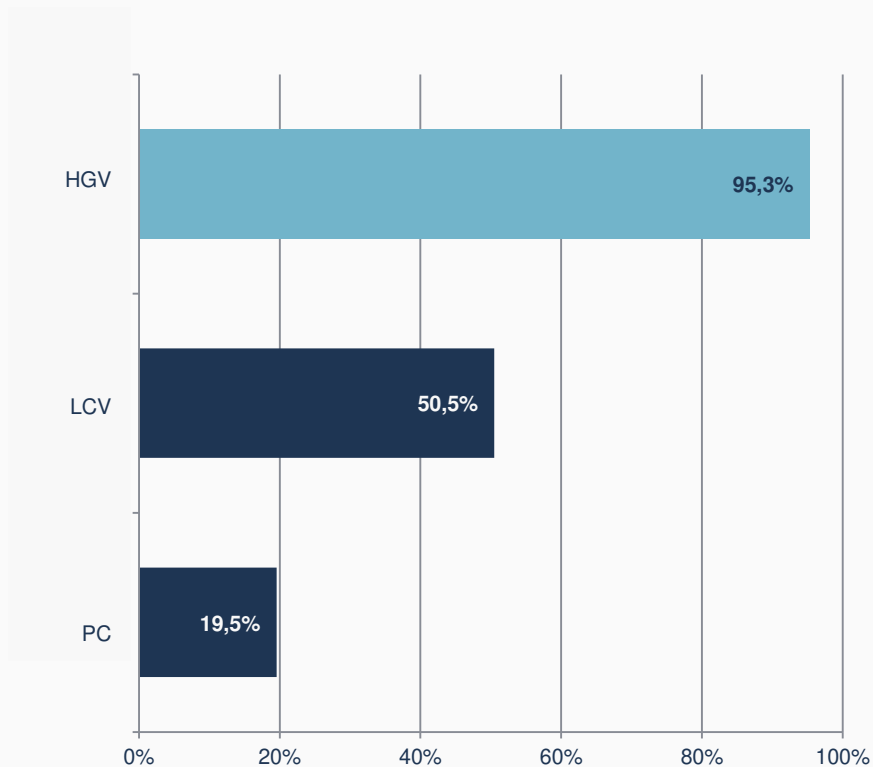
FleetBase®: Which telematics systems are used?



- Mileage and GPS positioning are by far the most used telematics systems.
- In about one third of the companies solutions for fuel and CO2 consumption, route optimization, mechanical alerts and driver's behavioural data are in use.
- Every fifth company relies on order management systems, electronic driving licence controls and driver's logbooks.

Types of vehicles Telematics systems: total

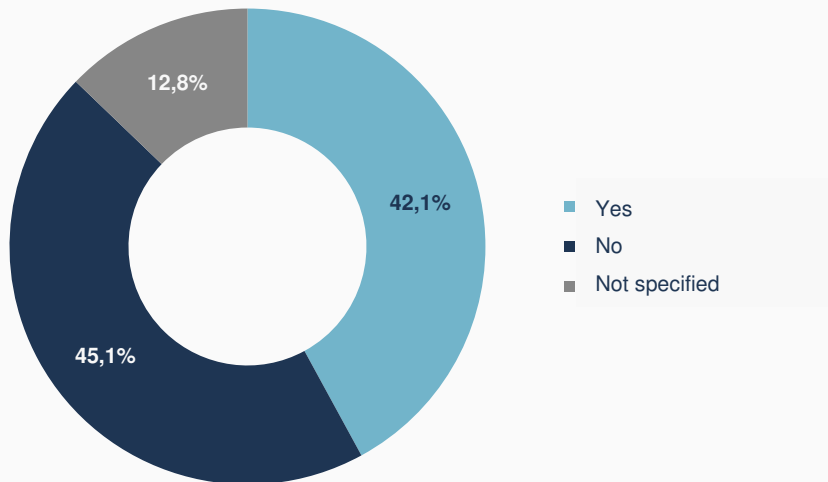
FleetInsight®: For which types of vehicles do you use telematics systems?



- **Almost all respondents state that telematics systems are used for trucks respectively heavy goods vehicles (HGV) in the fleet.**
- **Every second respondent names light commercial vehicles (LCV) and one in five respondents passenger cars (PC) as a vehicle type for a telematics application.**

Telematics & insurance rates: total

FleetInsight®: Could you imagine introducing telematics systems in combination with special insurance rates if this would reduce your contributions?



- If a reduction in costs is indicated by special insurance rates, just under half could envisage the introduction of telematics systems; however, this would not be demand-oriented, but purely cost-driven.

Telematics 2018: contents of the full study

- (1) Summary & conclusion: management summary**
- (2) Study design: methodology, samples & number of cases**
- (3) Analysis part I: FleetBase®: profile evaluation**
- (4) Analysis part II: FleetInsight®: ad hoc surveys**
 - (a) Telematics exclusive**
 - (b) Driver's licence**
 - (c) Pool vehicles**

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