

eSafetyChallenge 2010 – Fleet Manager Survey



IMK GmbH

June 2010

www.i-m-k.de

IMK

INSTITUT FÜR ANGEWANDTE MARKETING- UND KOMMUNIKATIONSFORSCHUNG GMBH

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1. Background and methodological design

Background and objectives

Together with another survey on user-choosers this study should look into the target group of fleet managers as well as decision makers who are involved in the process when it comes to purchasing new vehicles for the companies' fleet.

- The study should serve as documentation support for the project eSafetyChallenge 2010 and its main event in Millbrook, UK – 13th July 2010
- The study should look into the fleet policy and relevance of certain criteria for purchasing, installation rates of specific safety technologies in fleets and reasons for being less equipped as well as the potential influence and meaning of eSafety systems and sources of information
- The study was focused on the following six technologies:

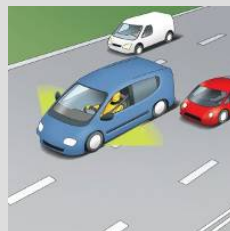
Electronic Stability Control



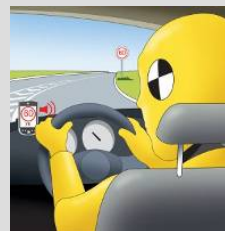
Advanced Emergency Braking



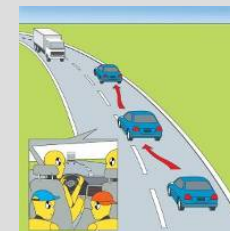
Blind Spot Monitoring



Speed Alert



Lane Support System



Adaptive Headlights



1. Background and methodological design

Study design

The study was planned and conducted as an online survey with the goal to achieve 100 fleet managers per country.

Target group

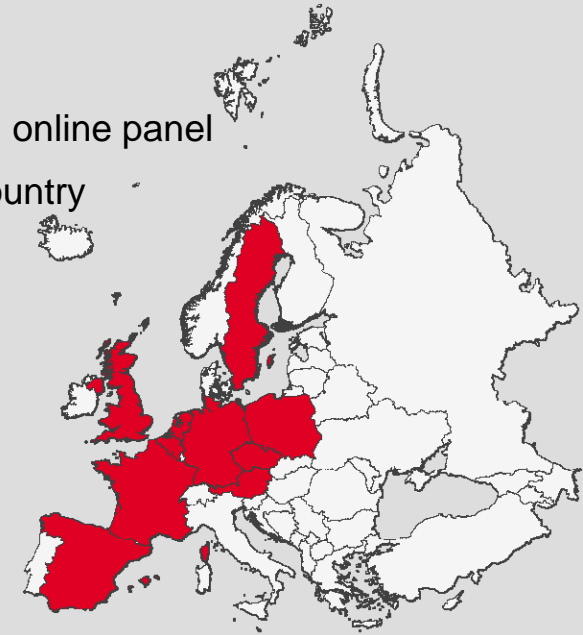
- Fleet managers and similar
- Must be involved in the decision making process for purchasing new vehicles
- Selected countries: Austria, Belgium, Czech Republic, France, Germany, Netherlands, Poland, Spain, Sweden and UK

Method

- Computer assisted web interviews (CAWI) using an online panel
- Total N=1,000 interviews, n=100 interviews each country
- Questionnaire translated into 8 languages
- Duration of questionnaire approx. t=10 minutes
- Data analyzed with statistical software SPSS

Timing

- Overall project period cw 7 to cw 23
- Conducting interviews between cw 13 and cw 22



1. Background and methodological design

Study design

To reach the target group it was planned to build up strategic alliances and co-operation with specialists from fleet manager magazines, associations, stakeholders and certain companies. Fleet managers were invited and encouraged by online articles, newsletters and personal emails.



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ROADSAFE

VNF

iFLEET.cz

Auto Firmowe

FLOTA
on-line

Autoflotte
online

L'AUTOMOBILE
& **L'Entreprise**
Le magazine des professionnels de parts

FLEETWORLD **FleetNews**

FleetEurope

acfo

FIRMENAUTO.de

Automobil Management

FLEET
& **business**

C.A.R.
Expertos en Flotas
An International Fleet Experts Company

WSP

GMI

firmenwagen

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2. Management Summary

Fleet policy and purchase of new vehicles

- Fuel consumption and engine type are the most frequently mentioned general areas under the fleet policy; Safety equipment is ranked on 5th place showing the highest value in Germany and the lowest in France
- Reliability of cars is the most important criteria when deciding which cars to include on the fleet; Safety plays an important role (3rd position) as well, especially in Austria and Sweden but rather less in UK and Poland

Potential meaning and influence of eSafety systems

- More than one third of European fleet managers rate the potential influence of safety systems on the total costs of ownership as (very) high, in Czech Republic even more than each second
- Close the half of European fleet managers (strongly) agree that eSafety systems can decrease the number of the most frequently types of accidents on their fleet, mainly in Spain

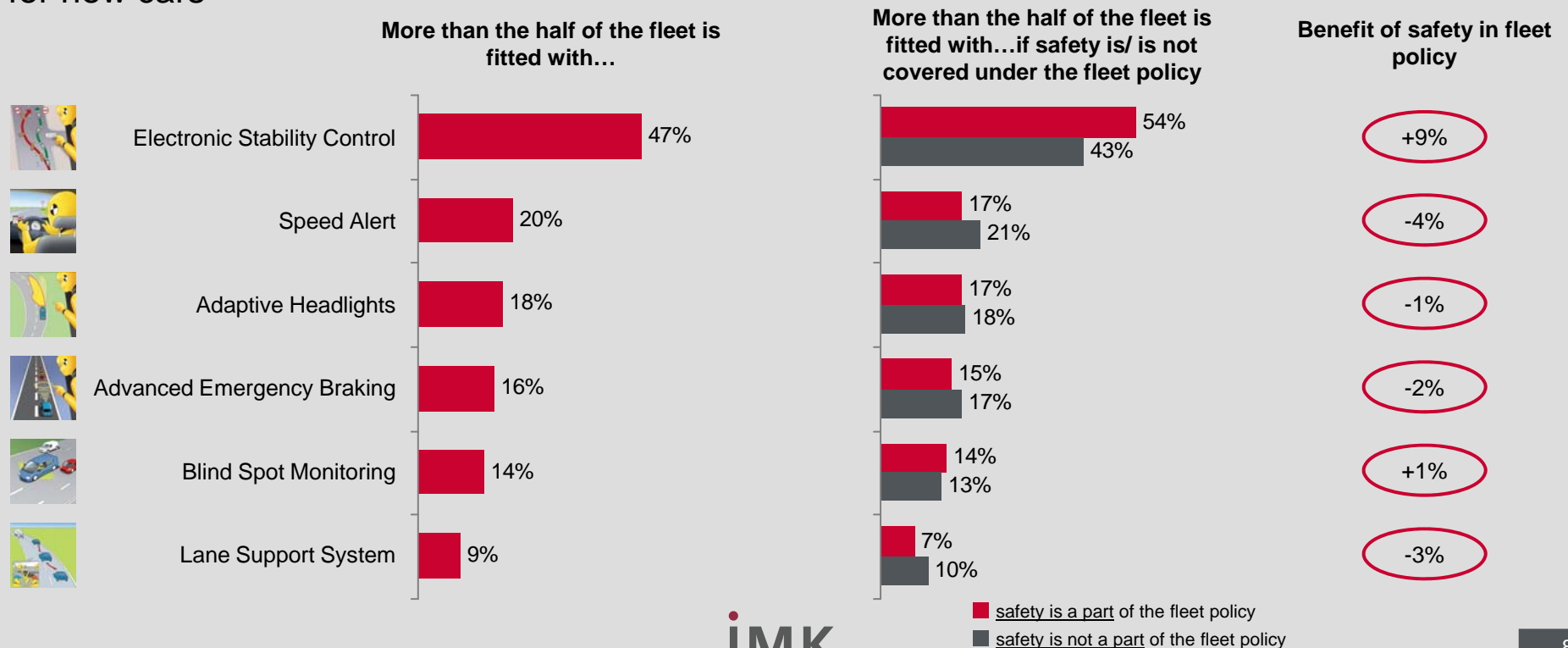
Preferences in information and communication

- More than each second fleet manager informs himself at car dealerships on-site
- Further sources of information are online networks, manufacturers, colleagues and leasing comp.

2. Management Summary

Installation rates of eSafety technologies in fleets

- Electronic Stability Control is the only eSafety technology that is frequently installed in the majority (50% and more) of all cars belonging to the companies' fleet
- If safety is a part of the companies' fleet policy only ESC shows a higher installation rate than not being part of it; it can be assumed that this refers to the fact that ESC already became mandatory for new cars















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3. Results

3.1 Statistical overview

	Total											
	1.179	118	106	147	138	134	108	105	108	108	107	
Do you manage your fleet or did you outsource the fleet management to a specialist?												
I manage the fleet in-house	79%	83%	82%	86%	73%	87%	74%	86%	73%	59%	84%	
the fleet management is outsourced to a specialist	21%	17%	18%	14%	27%	13%	26%	14%	27%	41%	16%	
How many vehicles do you have on your fleet?												
Cars												
< 20		55%	77%	47%	45%	56%	48%	72%	50%	73%	31%	55%
20 < 50		16%	13%	11%	25%	12%	16%	12%	19%	14%	17%	23%
50 < 100		9%	4%	10%	14%	7%	12%	4%	14%	4%	18%	7%
100 < 500		12%	2%	19%	14%	13%	15%	6%	10%	2%	27%	8%
500 >		8%	4%	12%	3%	12%	10%	6%	7%	7%	8%	7%
Vans												
< 20		79%	90%	75%	88%	78%	81%	81%	80%	84%	75%	63%
20 < 50		9%	7%	8%	7%	7%	5%	6%	12%	9%	13%	20%
50 < 100		4%	1%	4%	2%	4%	5%	6%	3%	1%	3%	9%
100 < 500		4%	2%	6%	2%	4%	3%	3%	2%	1%	7%	5%
500 >		4%	1%	8%	---	7%	5%	5%	3%	5%	2%	4%

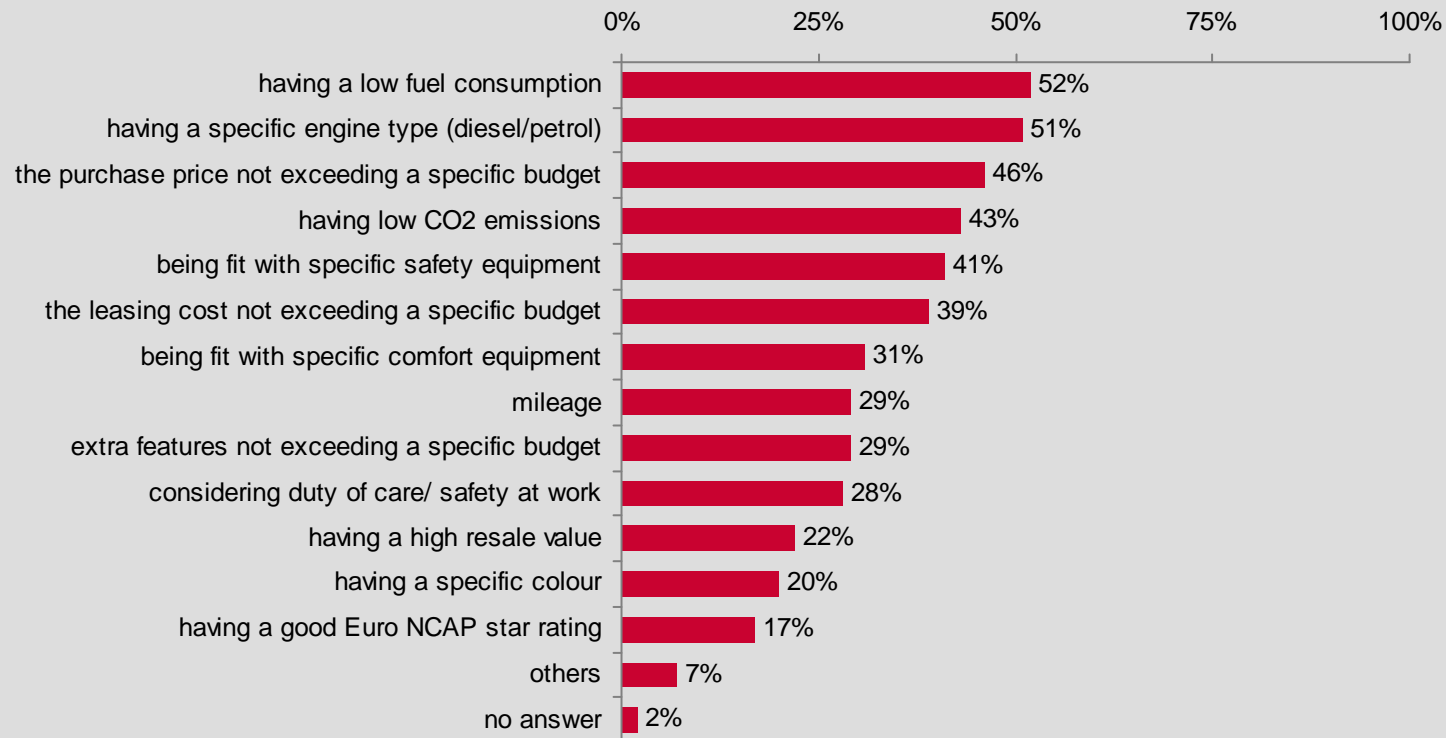
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3. Results

3.2 Fleet policy and purchase of new vehicles

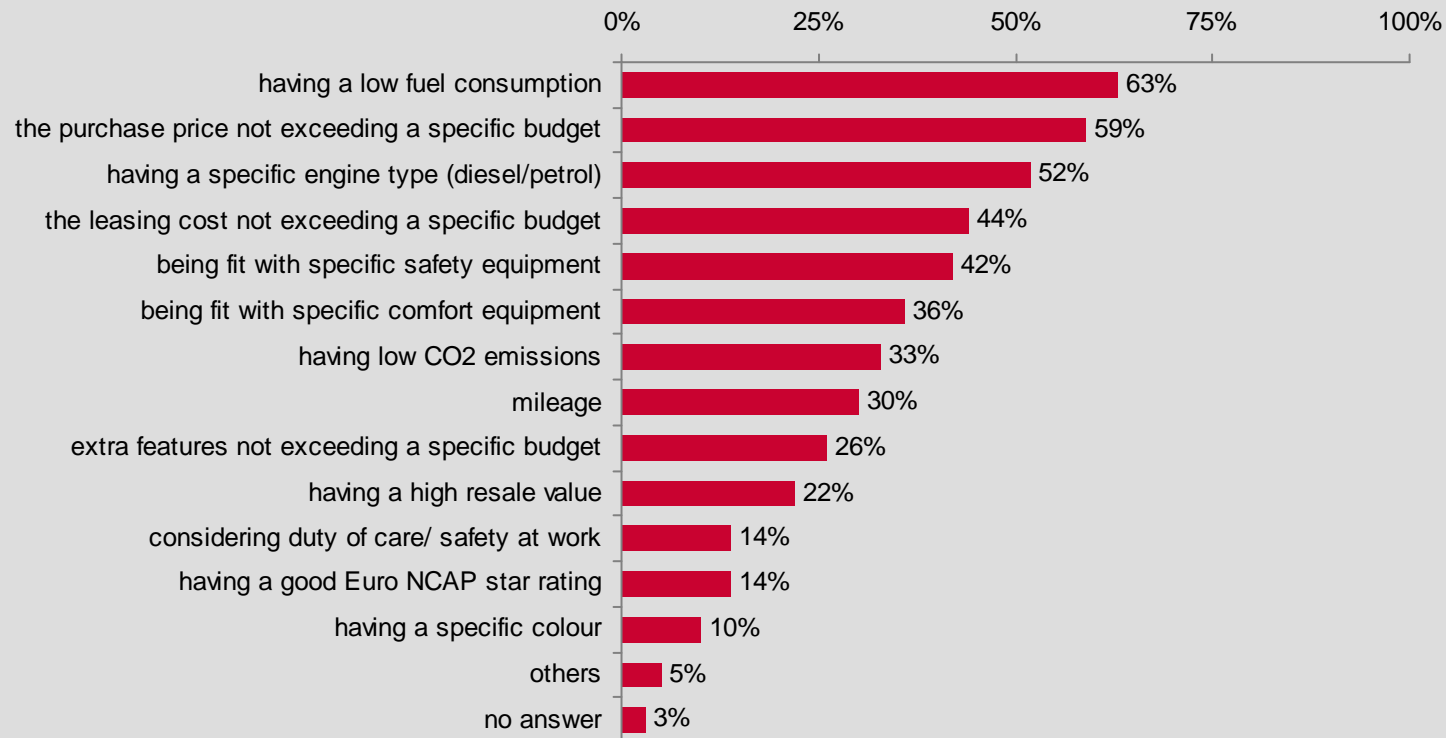
What are the general areas covered under your fleet policy in terms of vehicle choice? (multiple answers possible)



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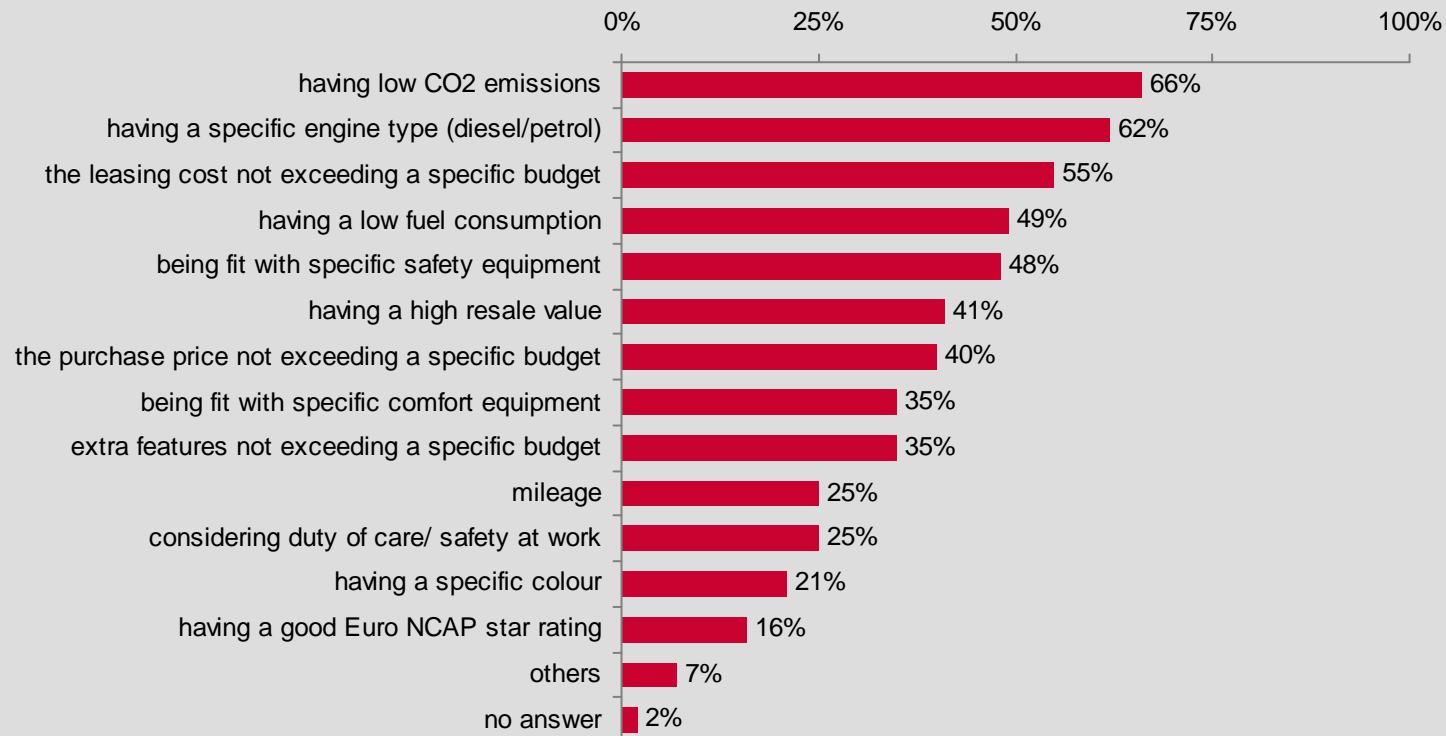
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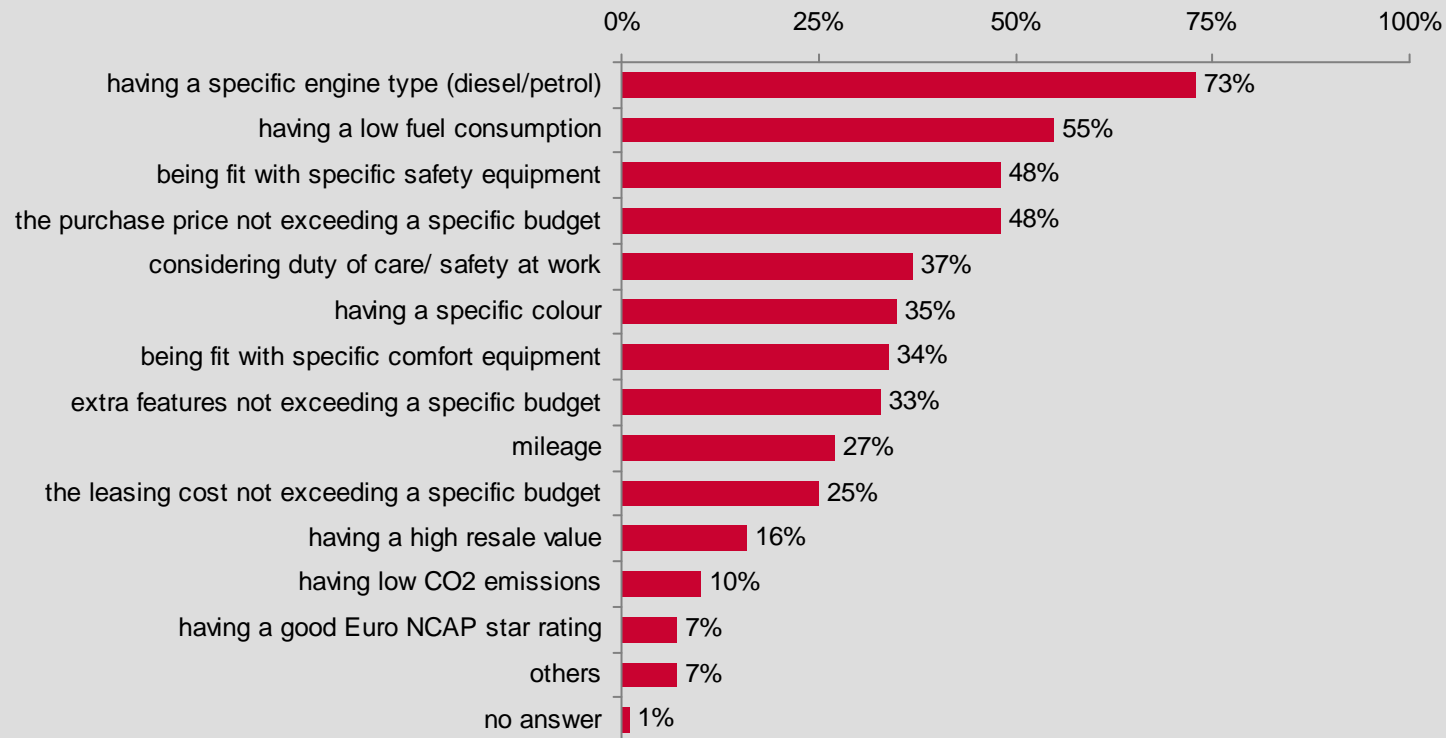
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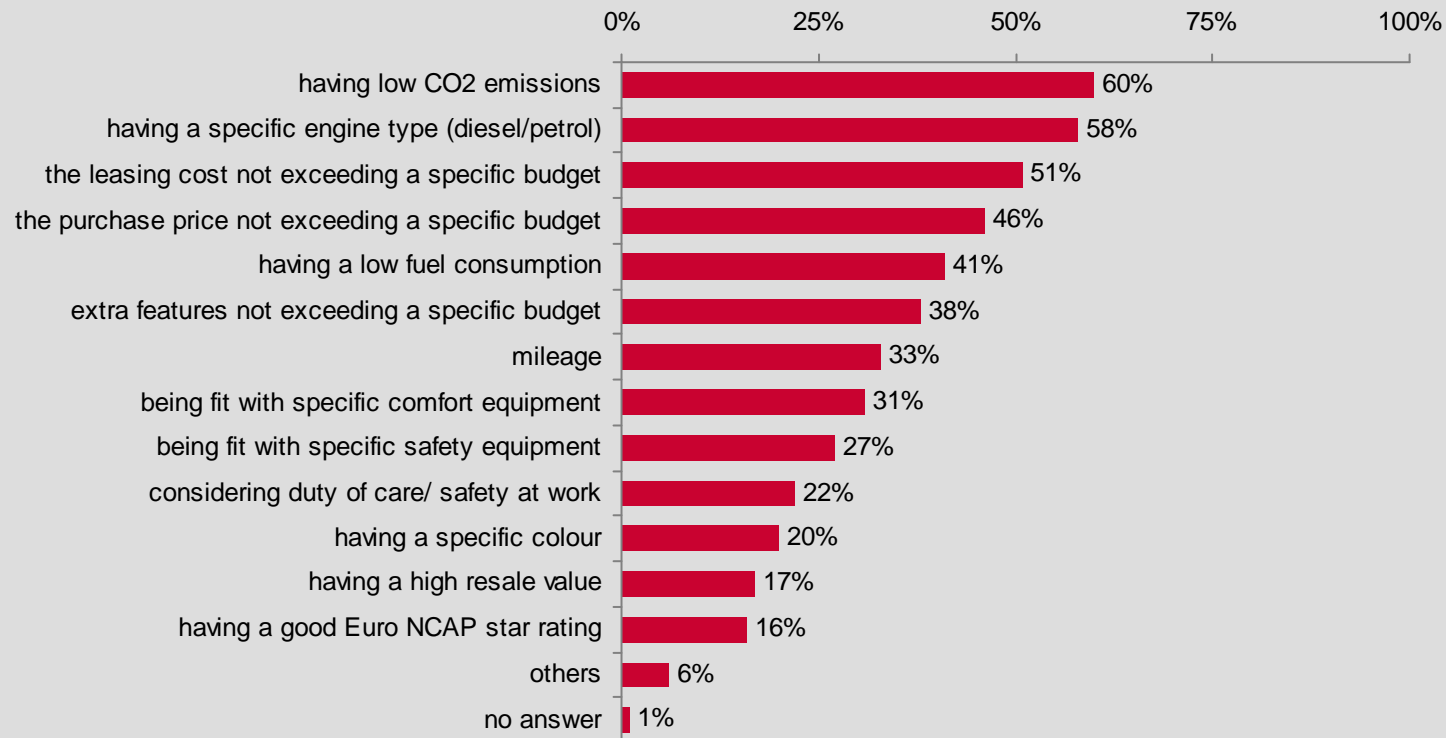
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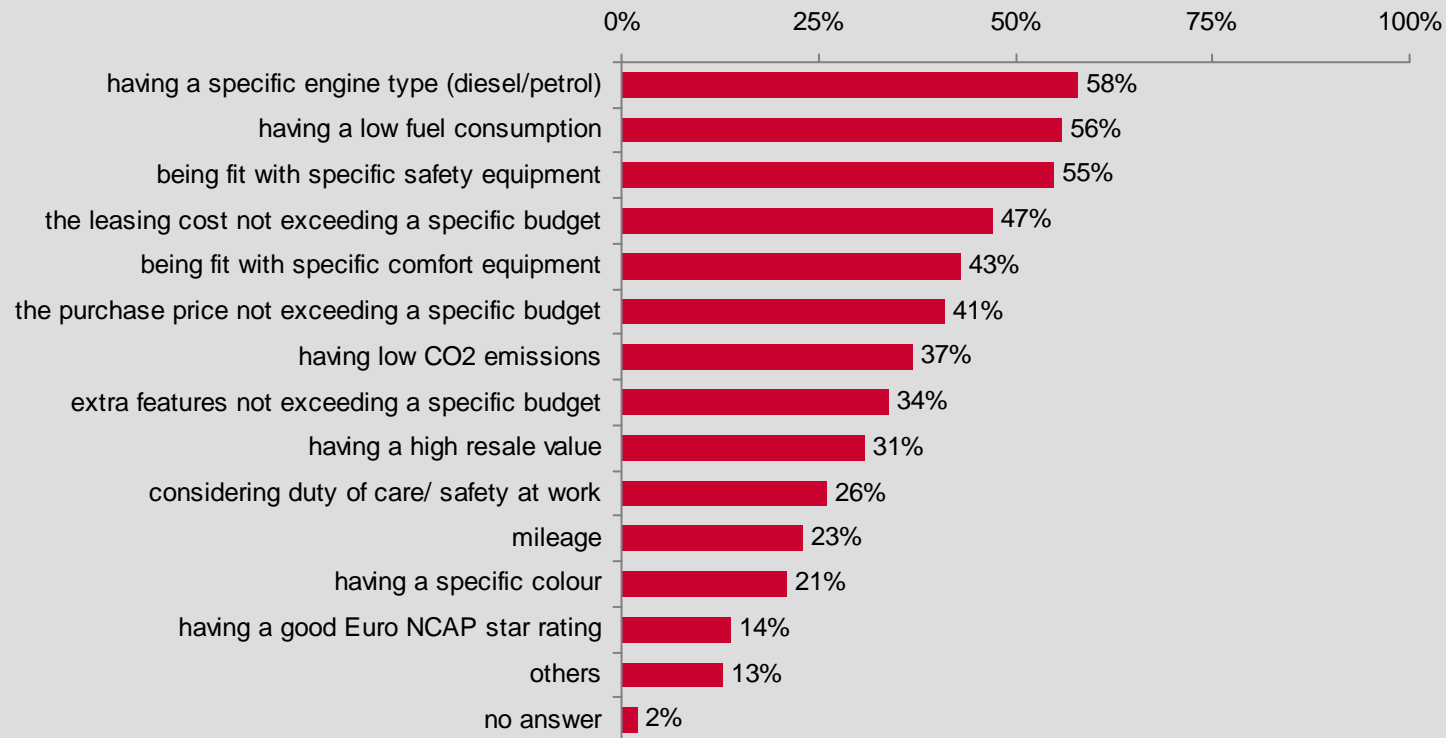
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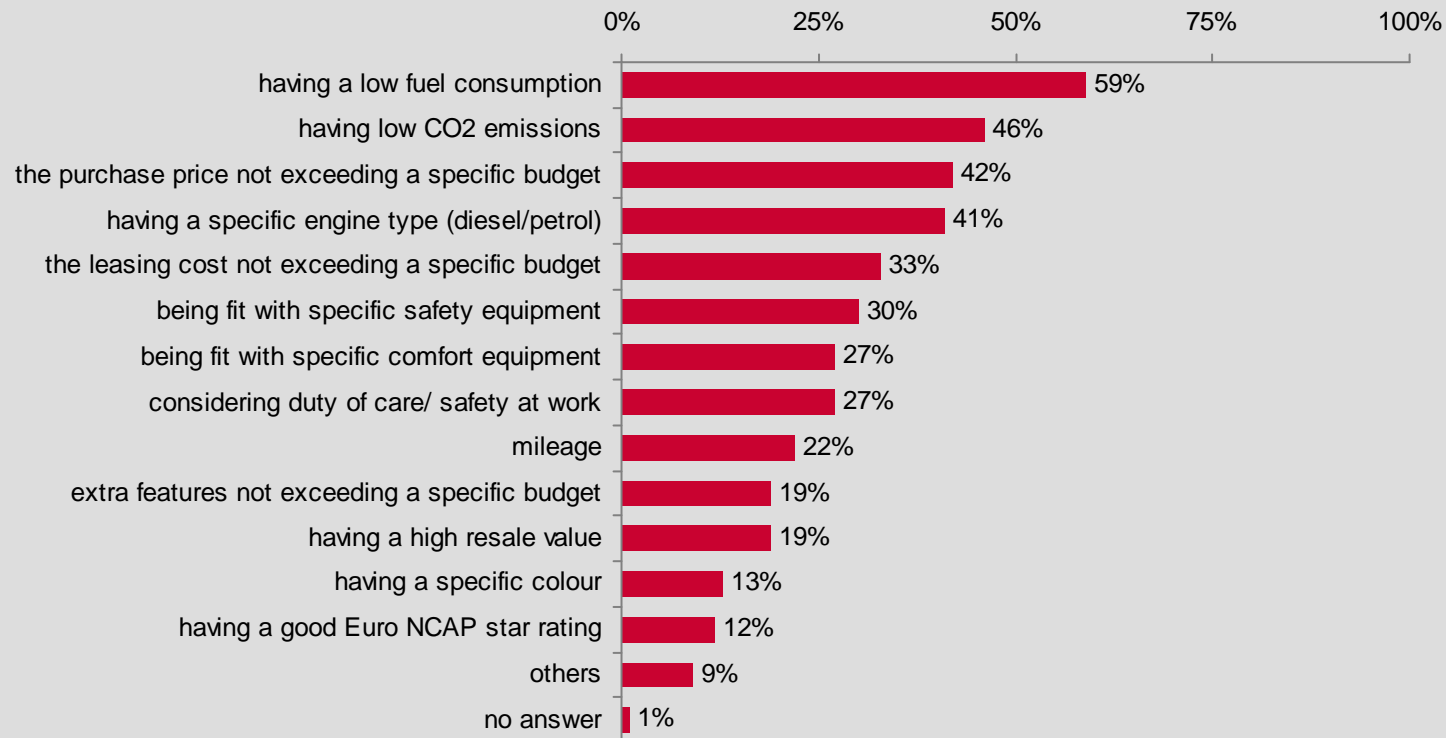
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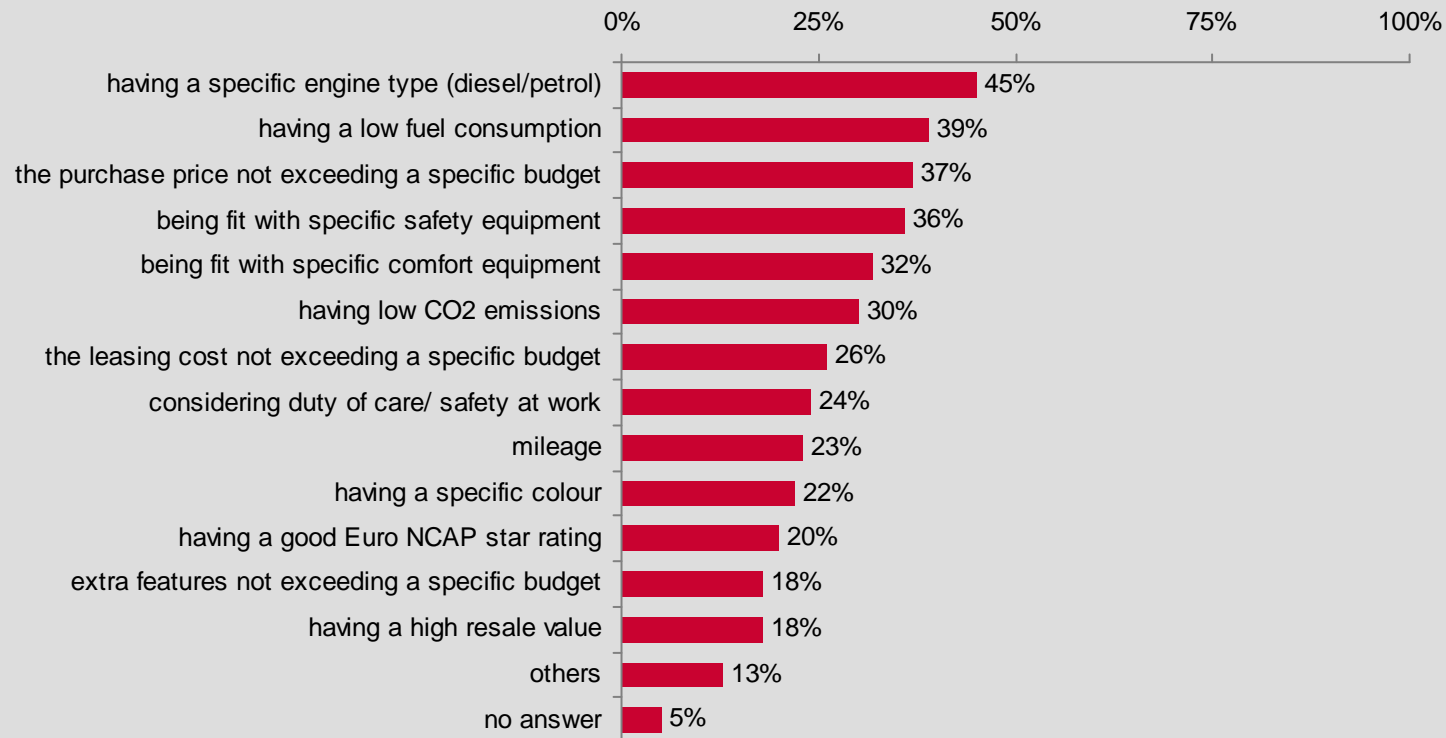
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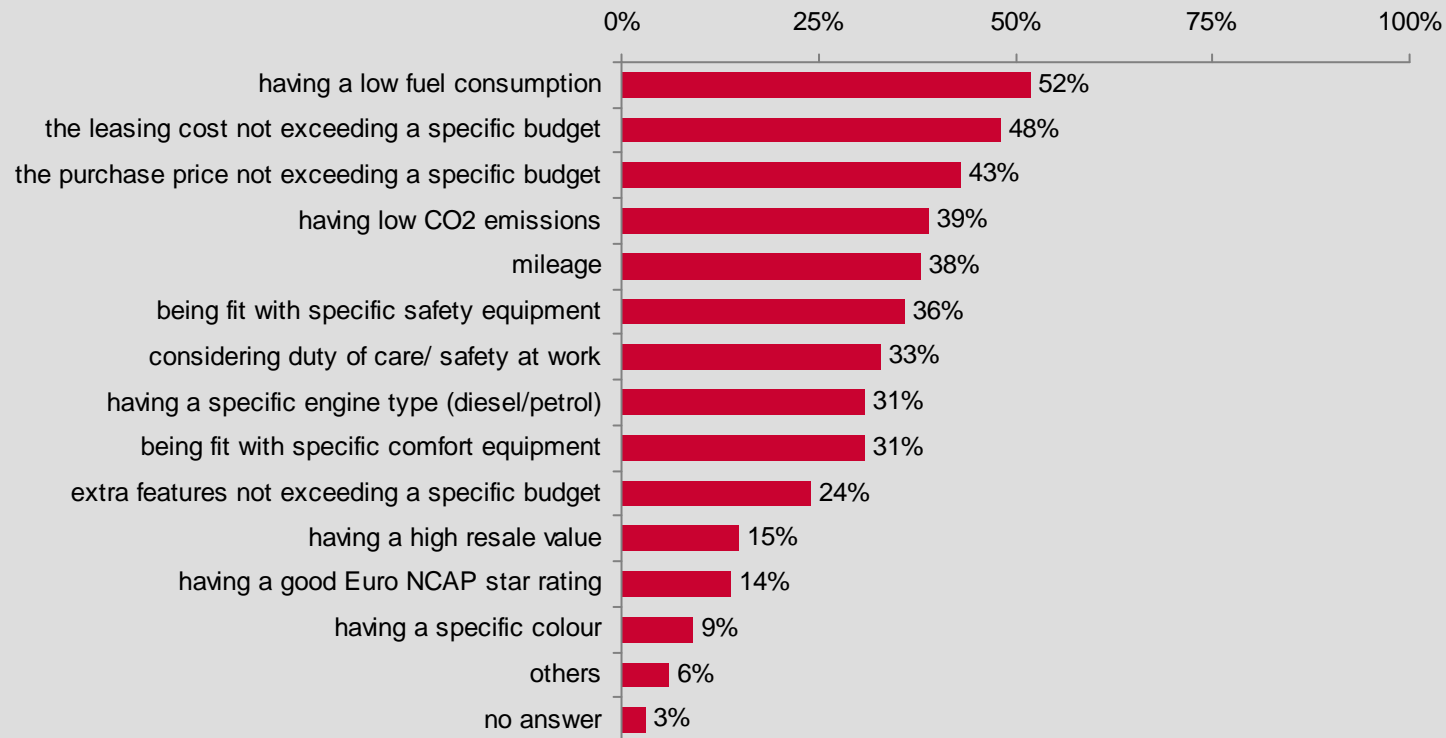


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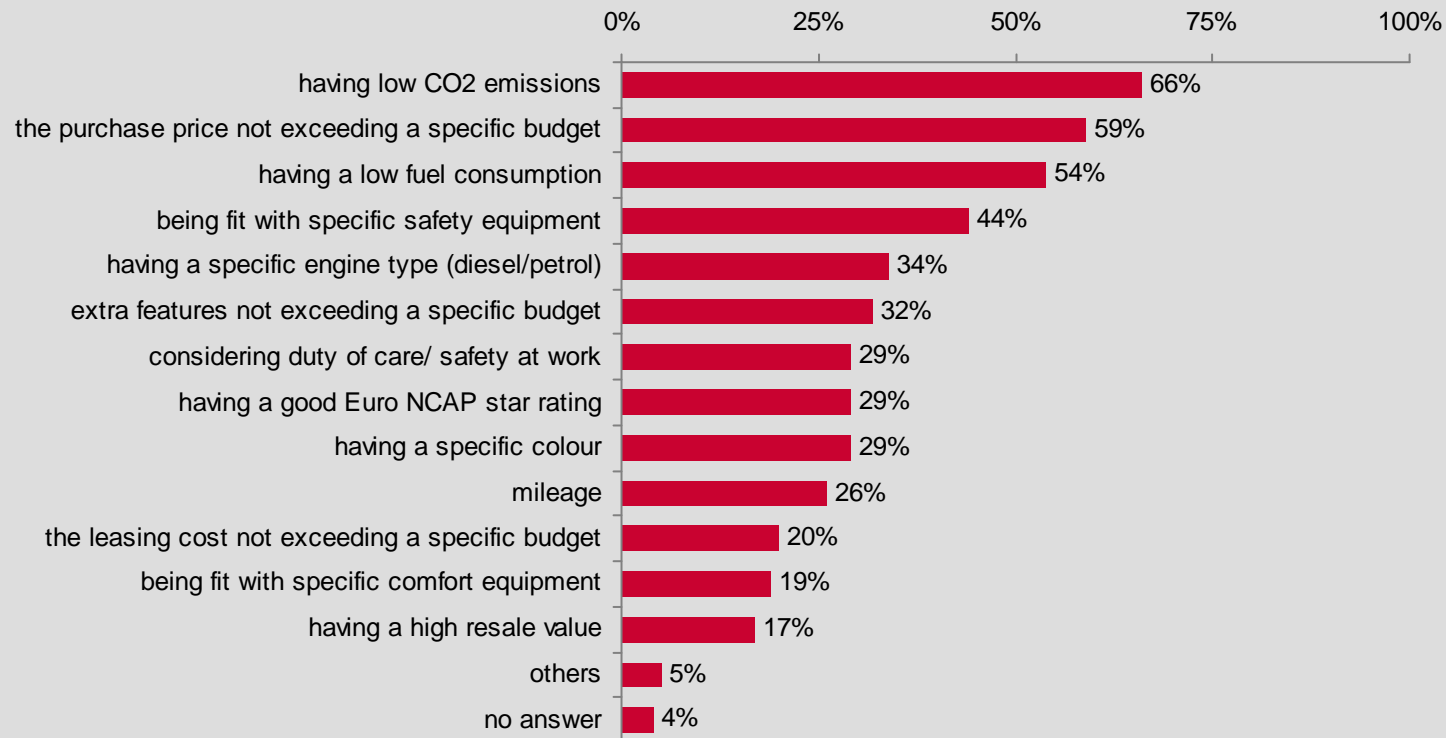


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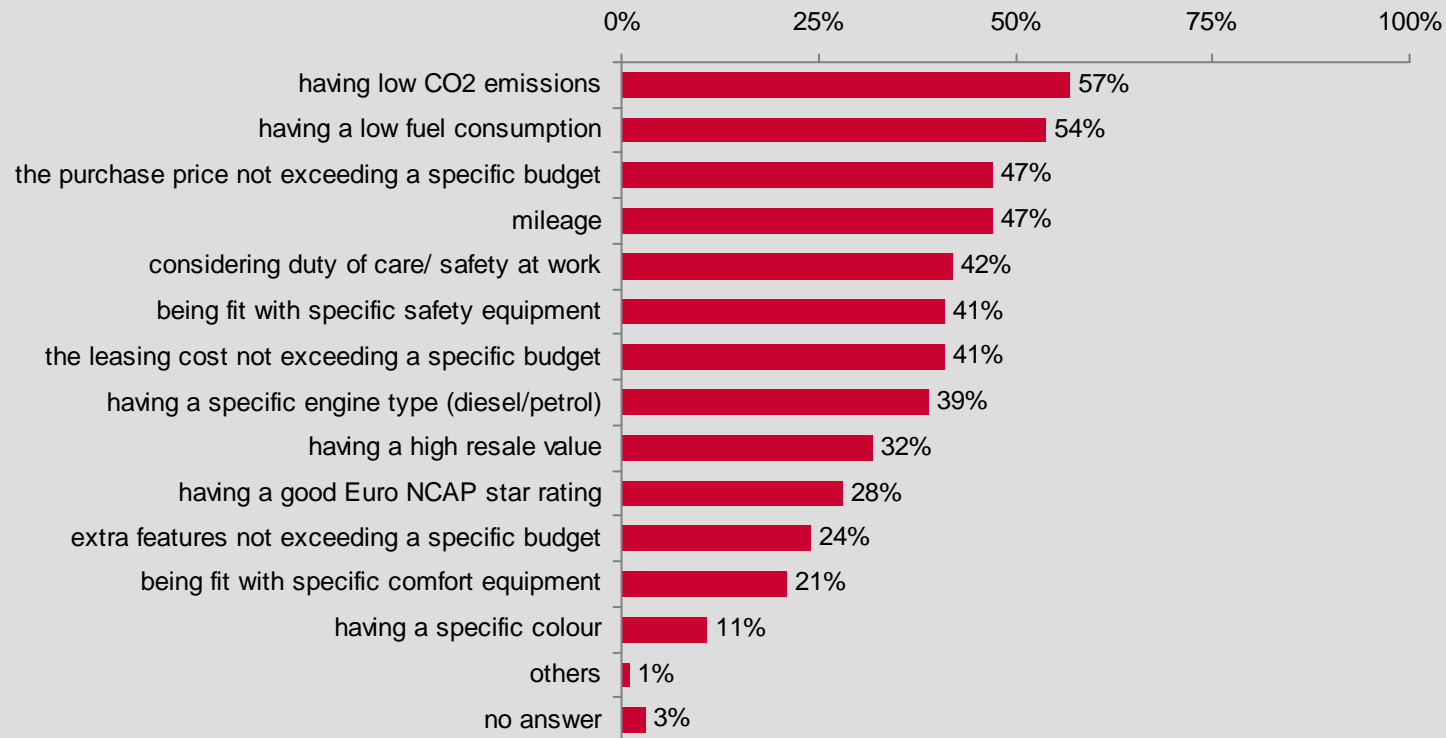


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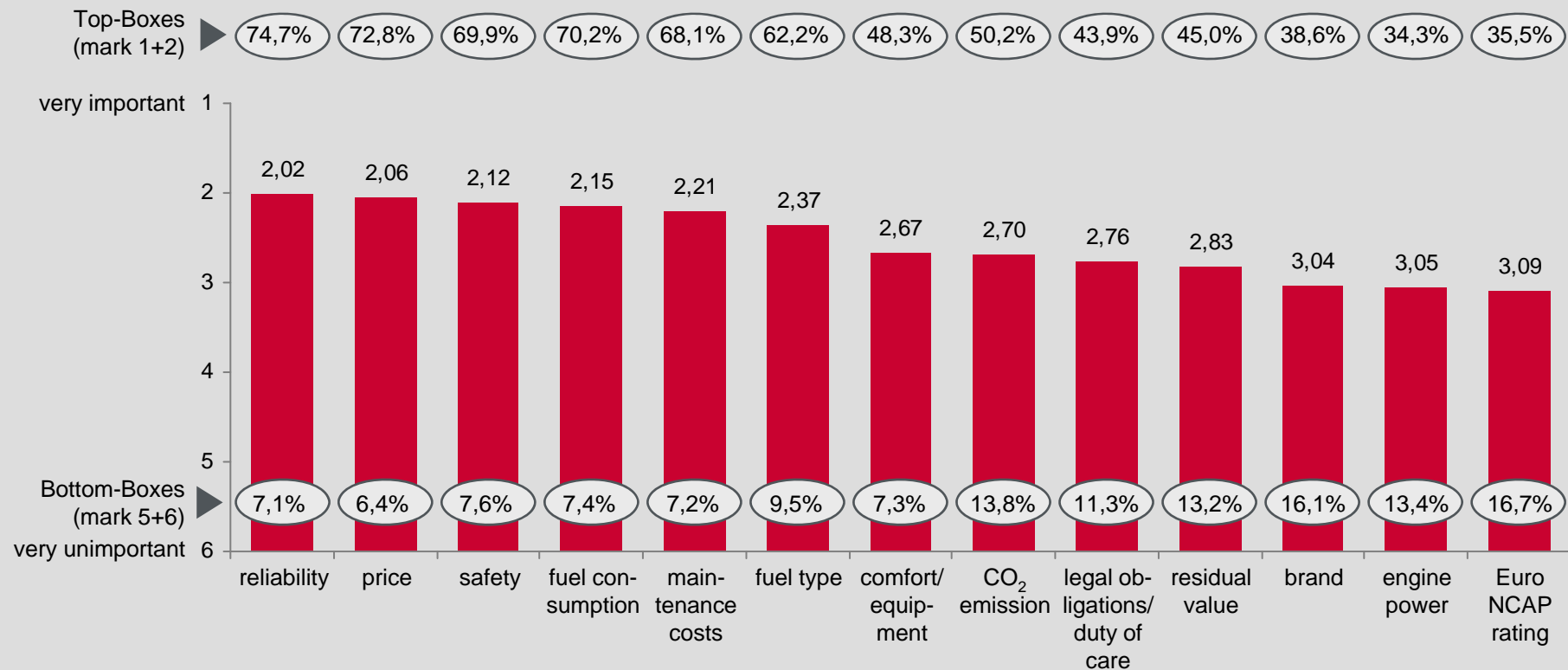


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3.2 Fleet policy and purchase of new vehicles

How do you rate the following criteria in terms of their importance when deciding which vehicles to include on your fleet?

(Please rate with marks from 1 to 6: The "1" means "very important", the "6" means "very unimportant". With the marks between you can define your vote!)

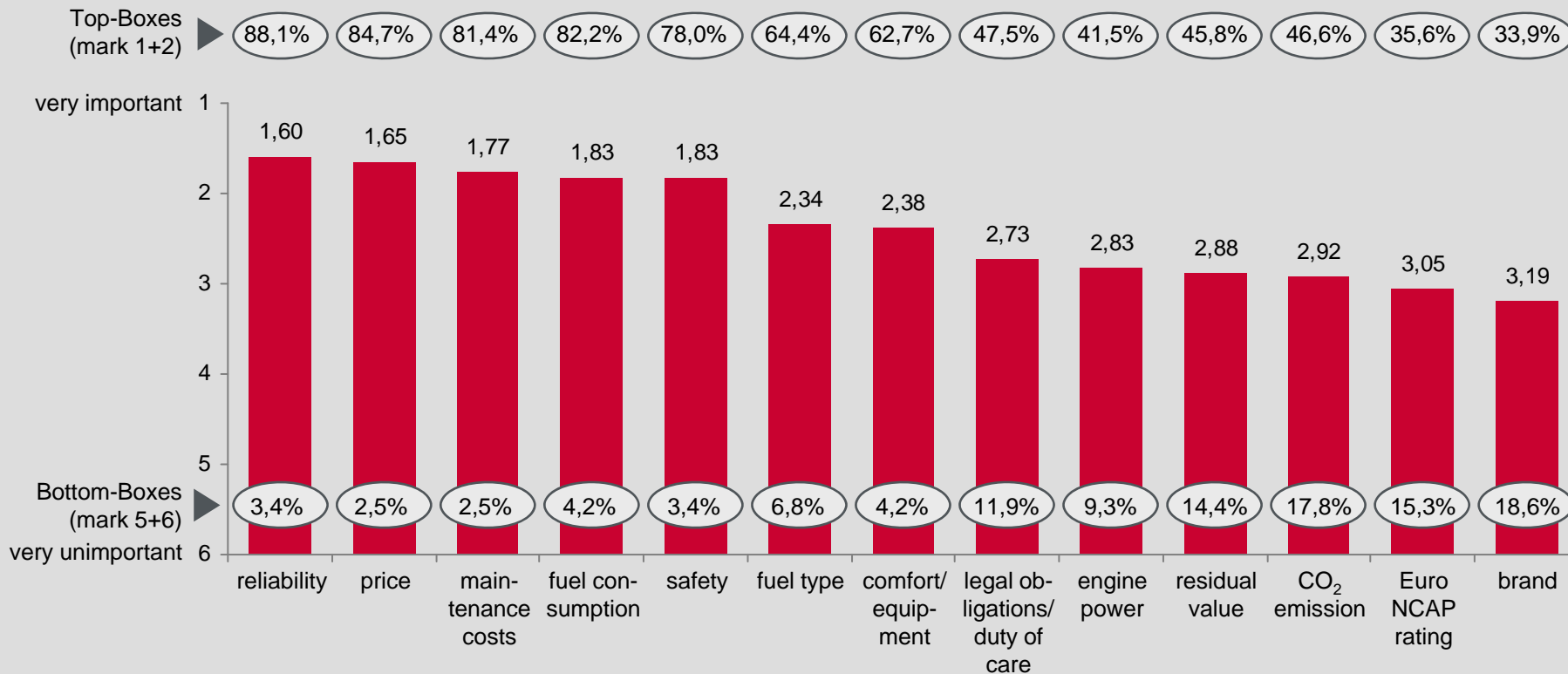


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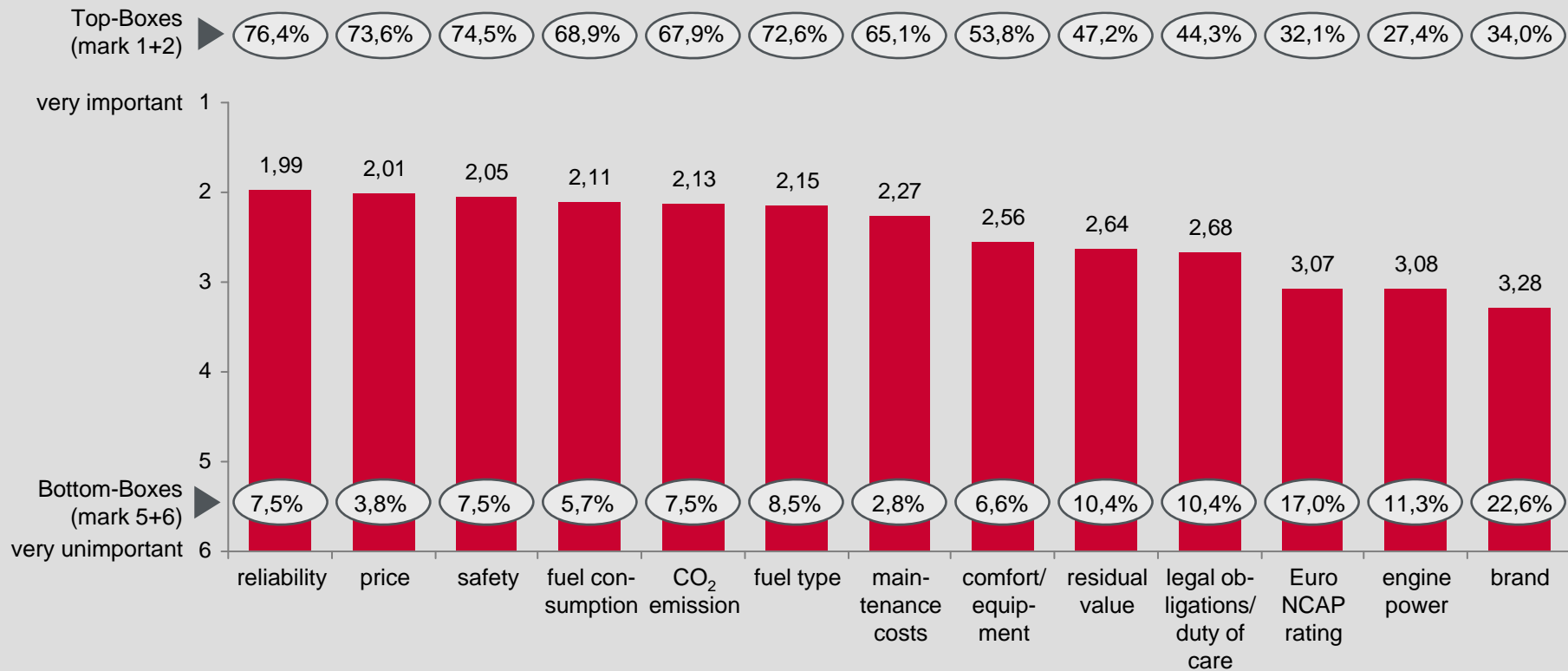
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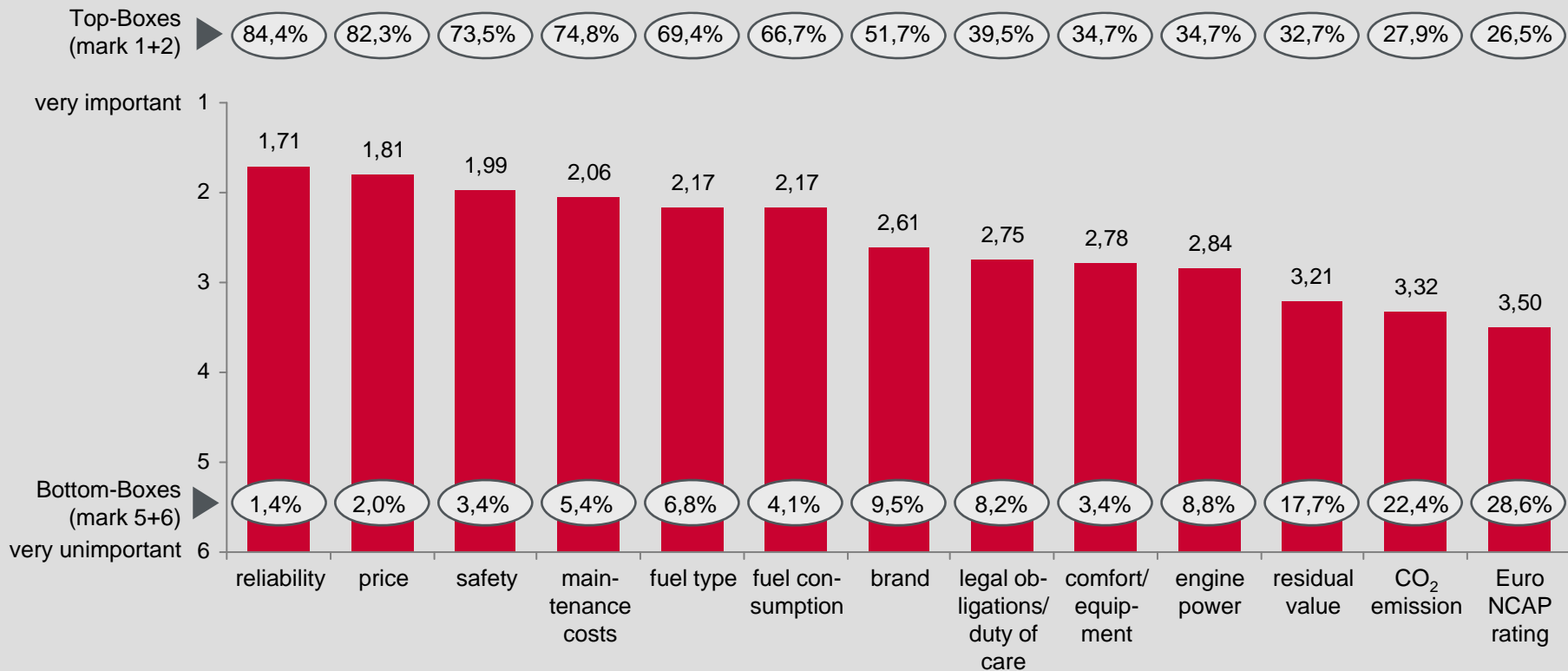


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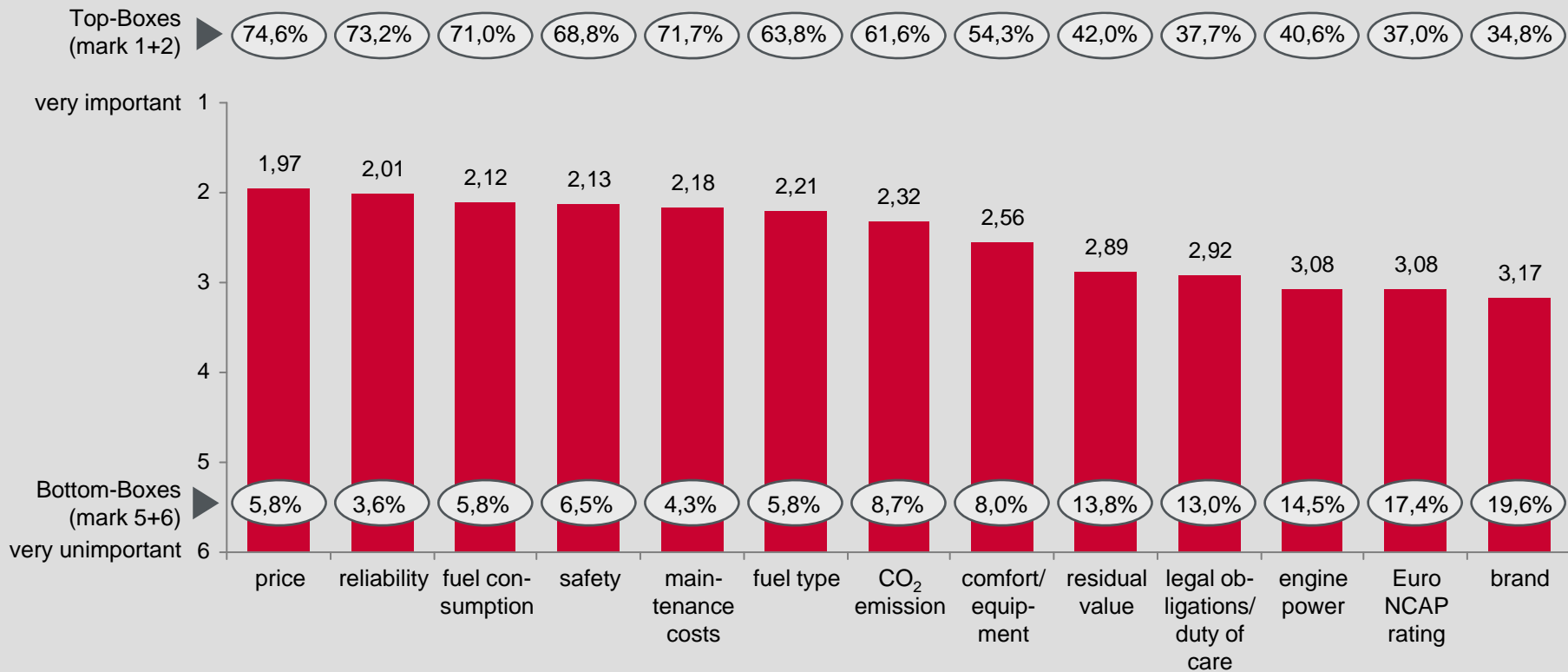
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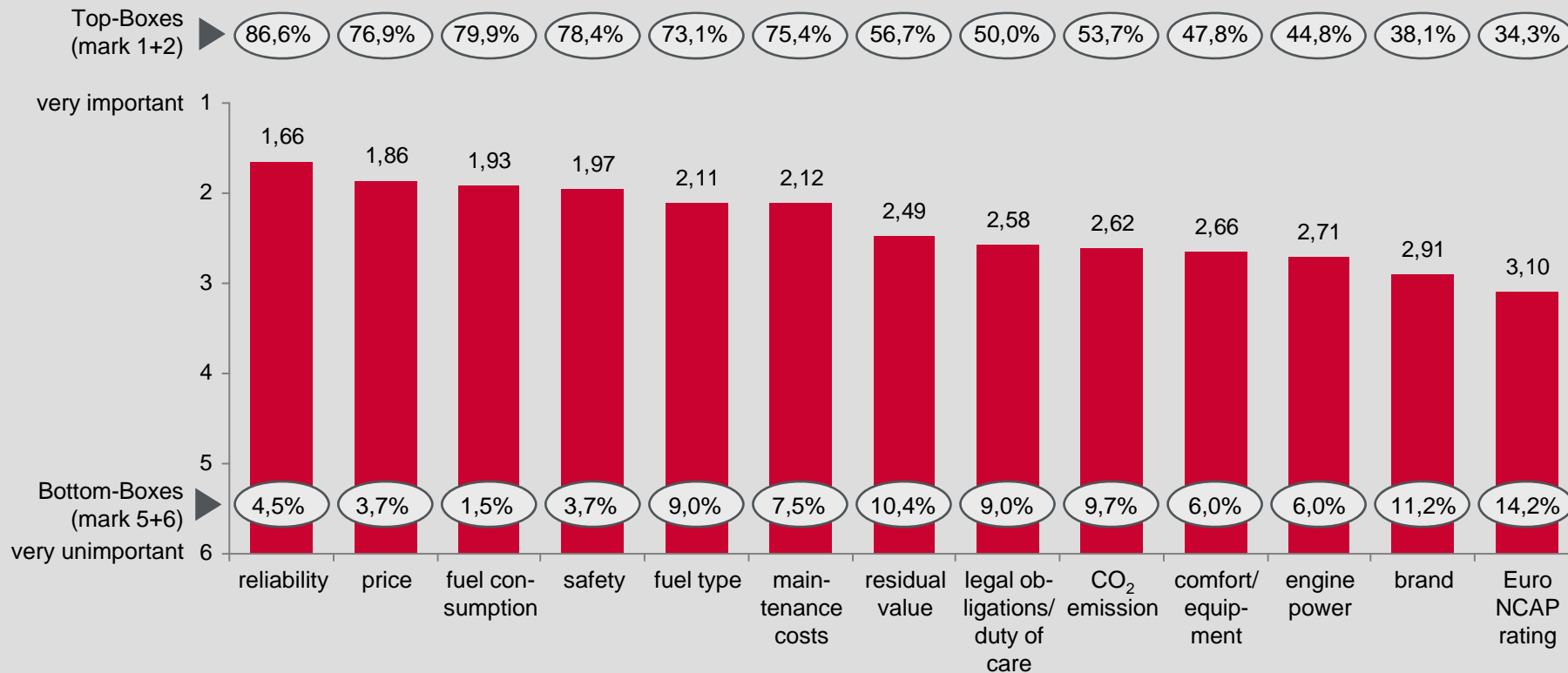


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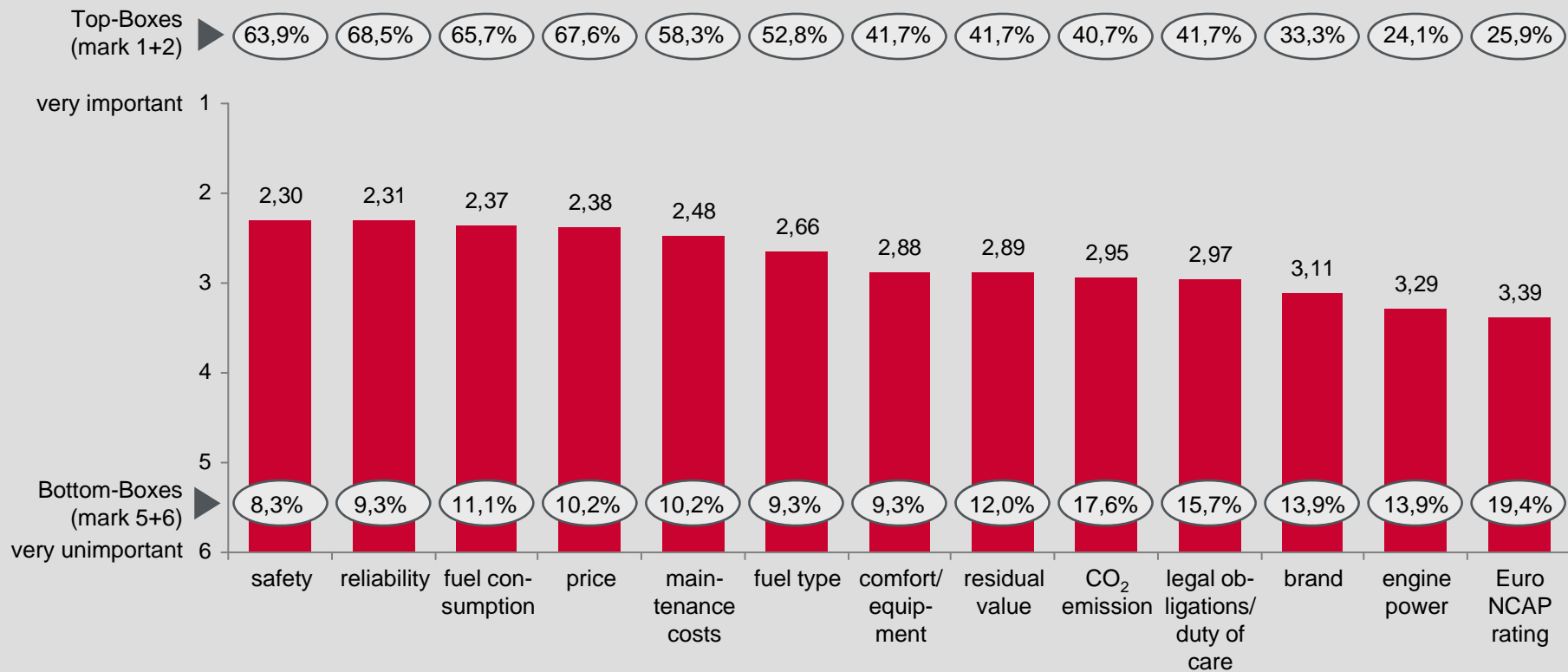
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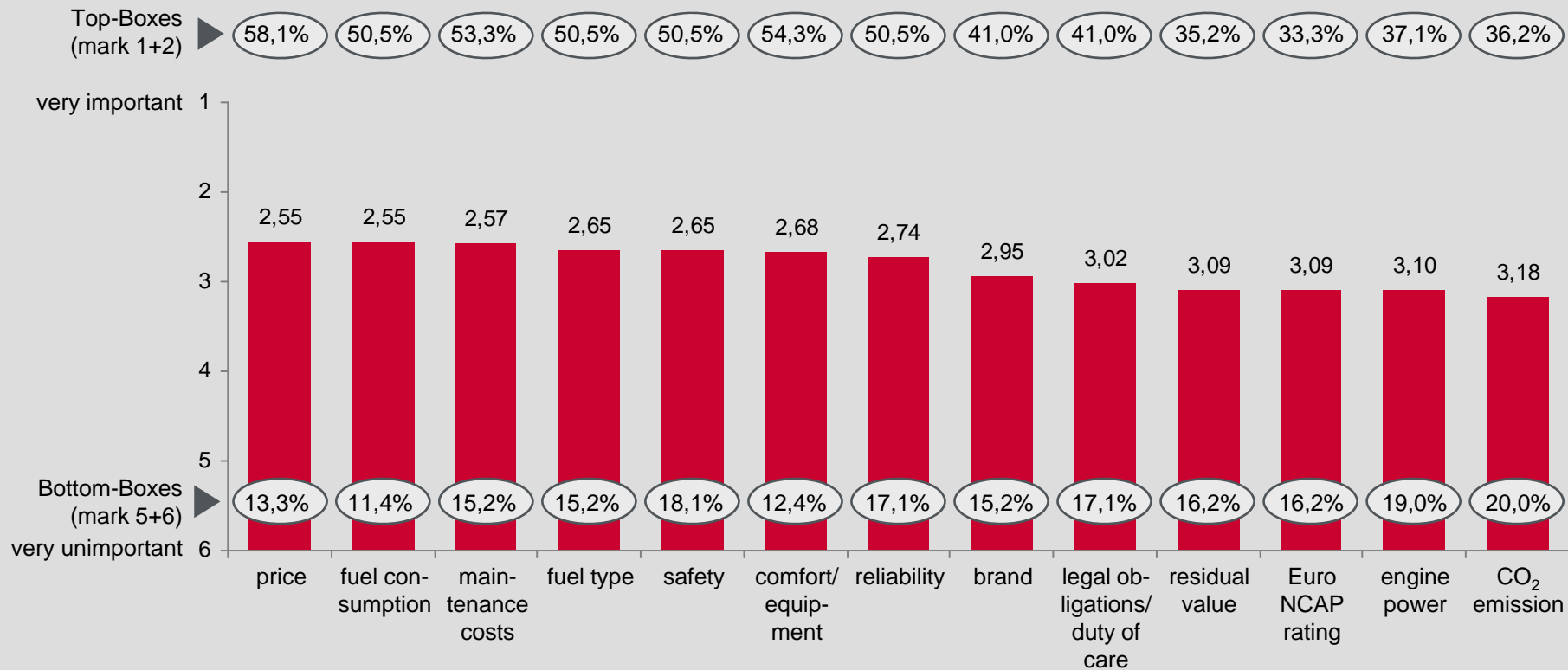


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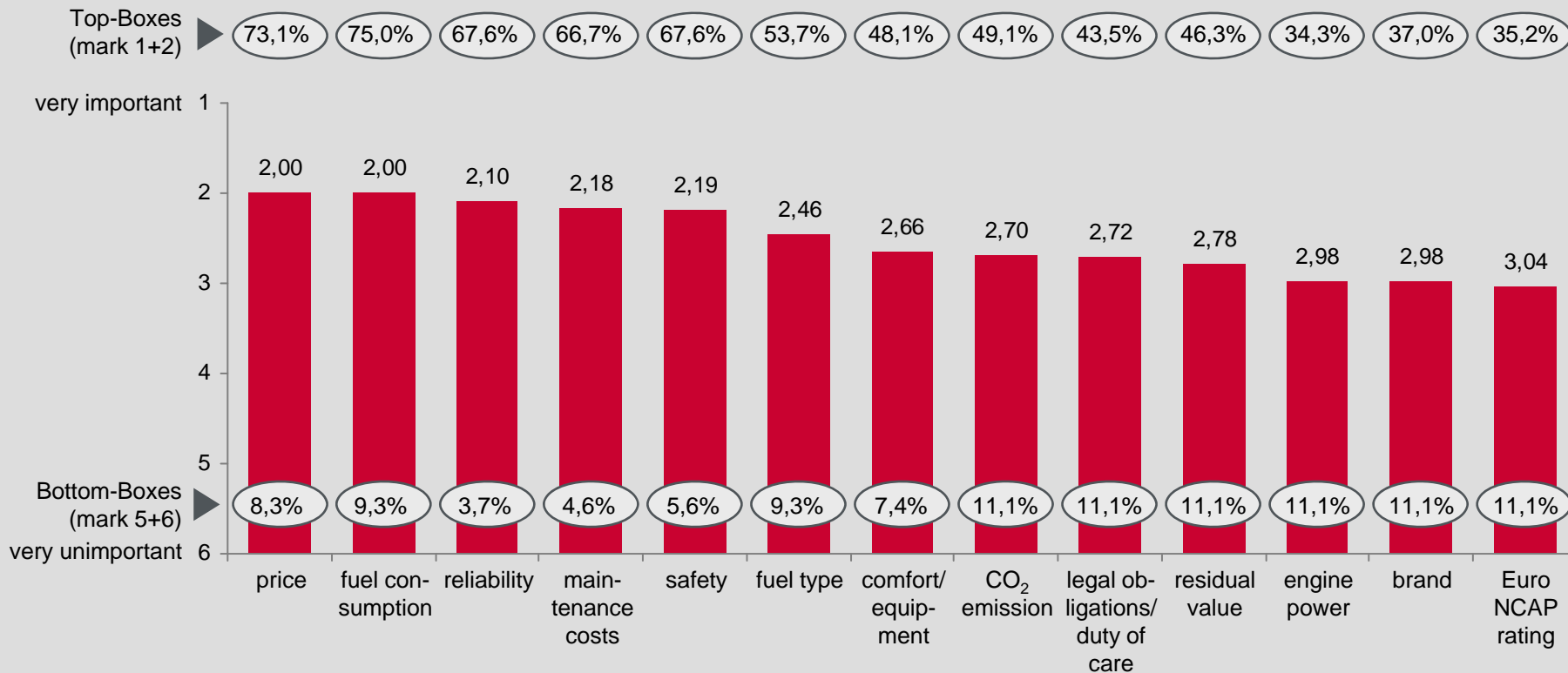


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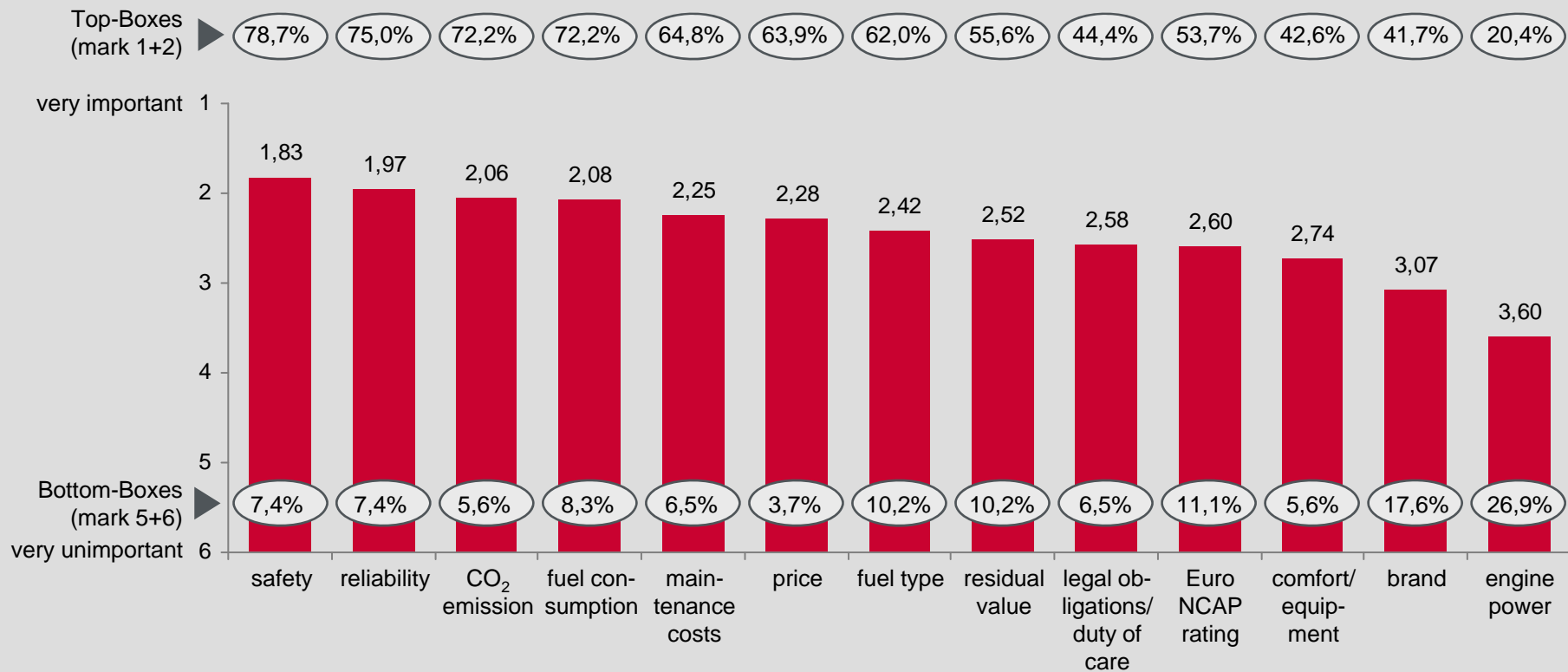
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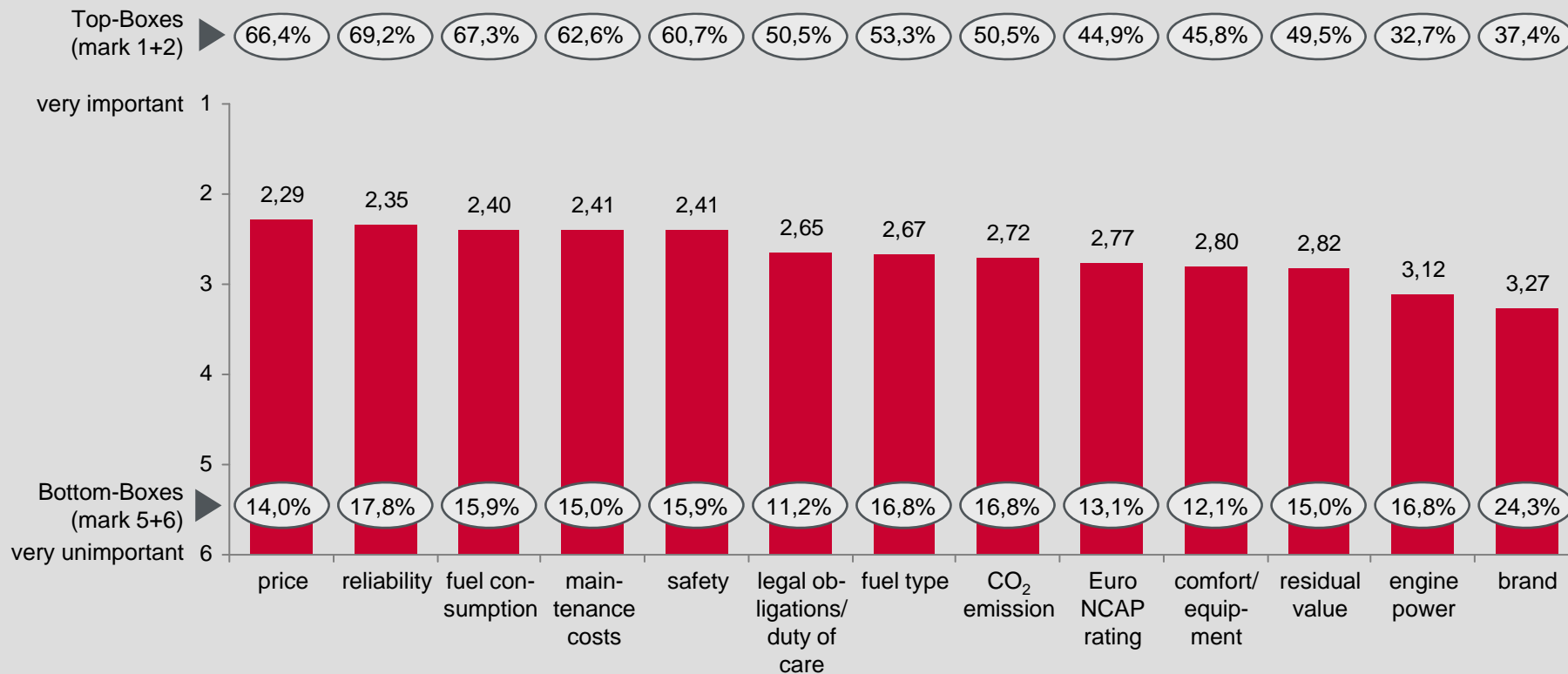
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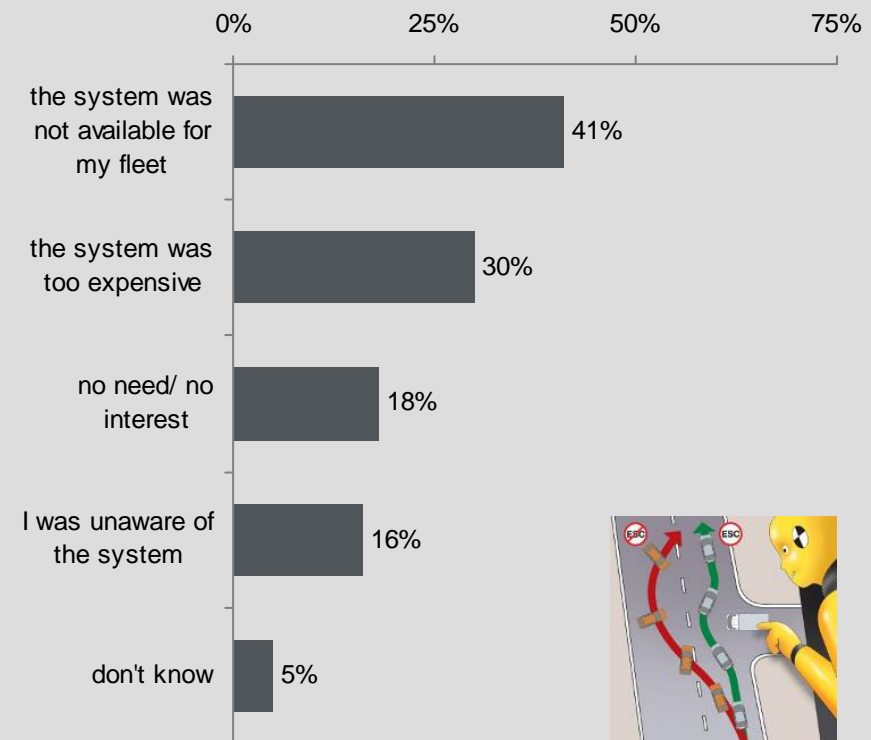
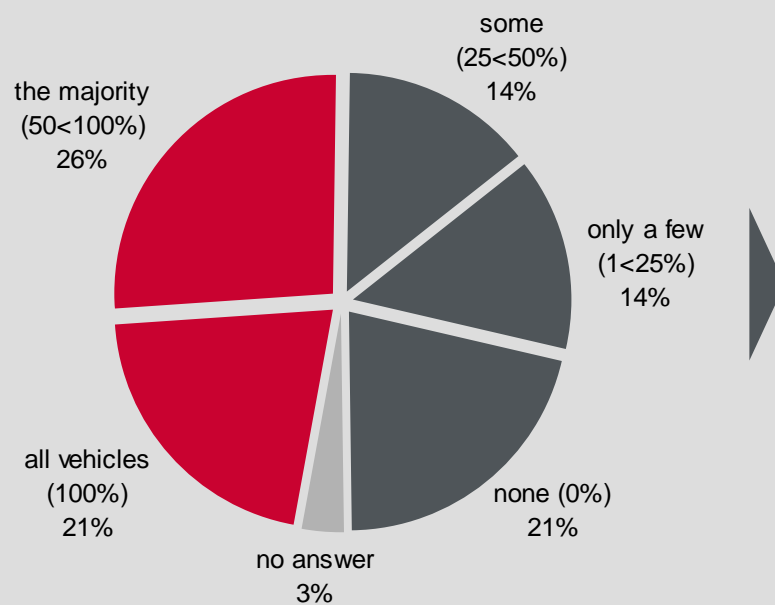
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3.3 eSafety systems in fleets

3.3.1 Electronic Stability Control

Do you have Electronic Stability Control on your fleet?

Why is your fleet less or not equipped with Electronic Stability Control? (multiple answers possible; filter: only respondents with "<50%")

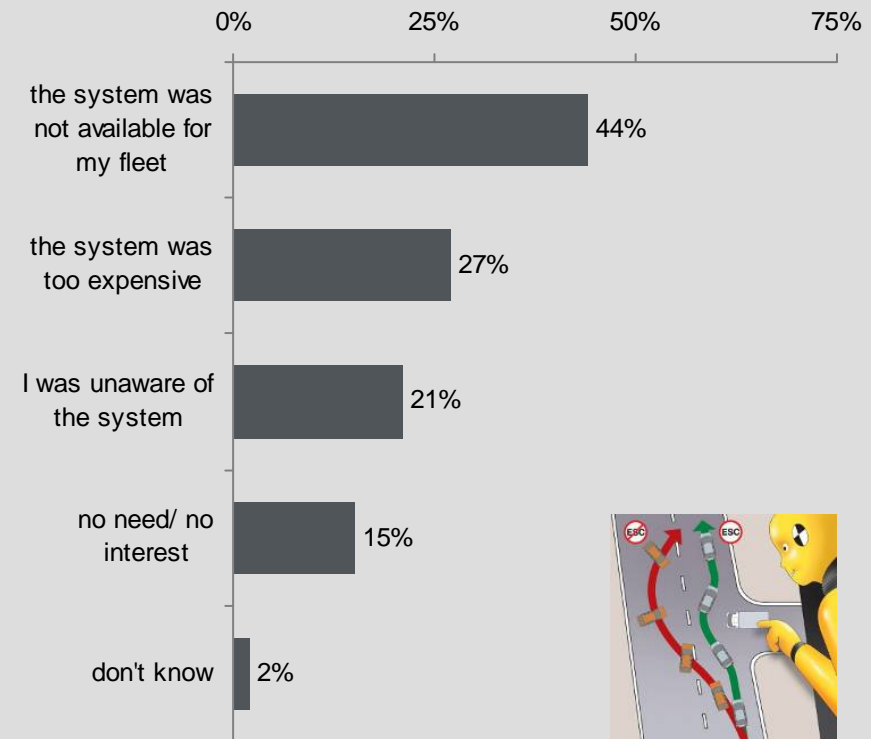
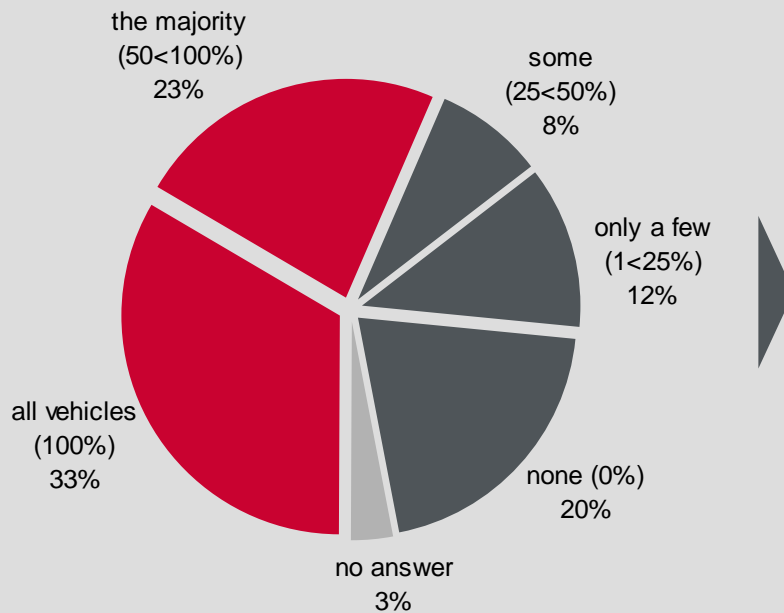


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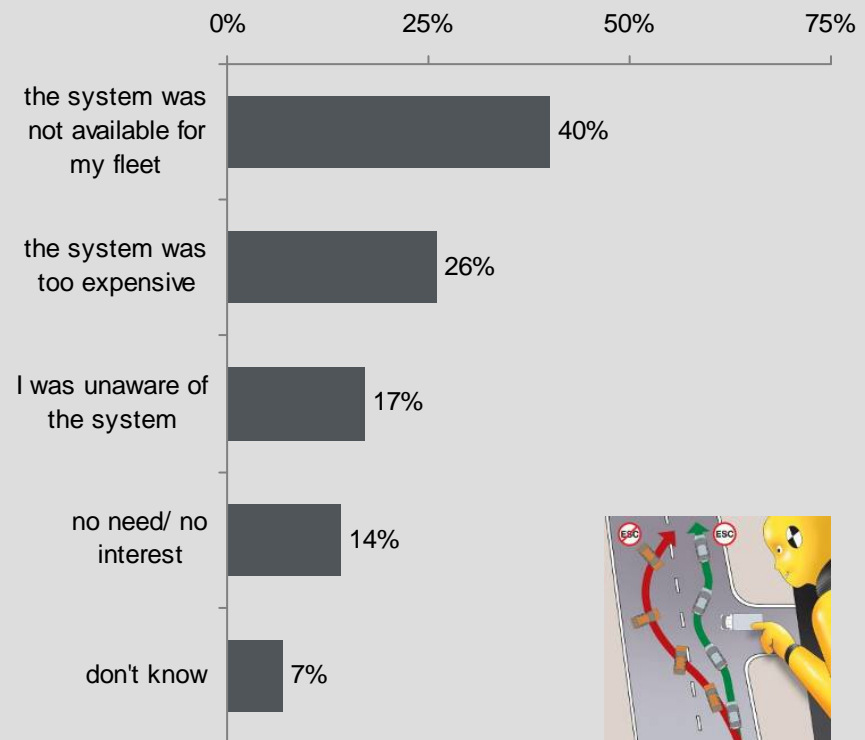
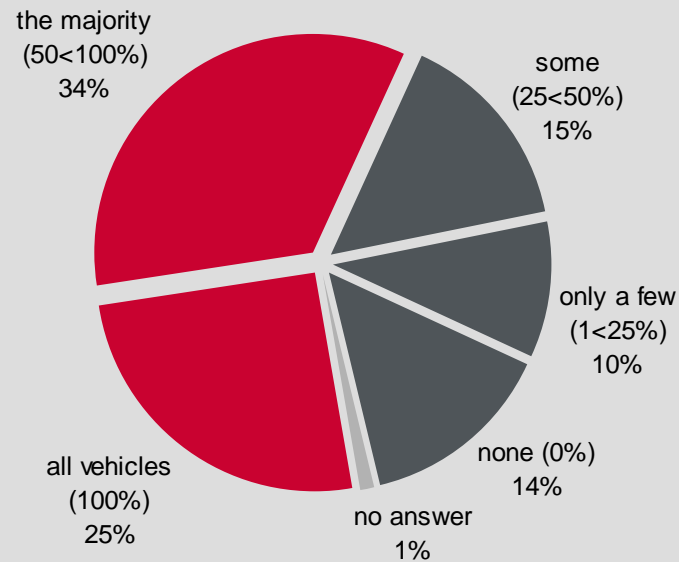
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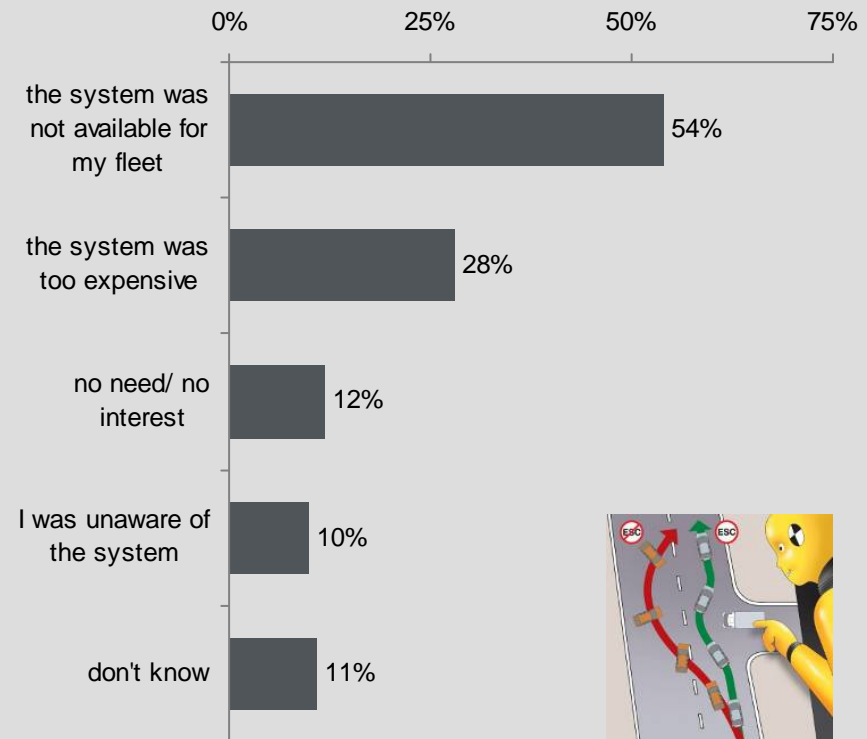
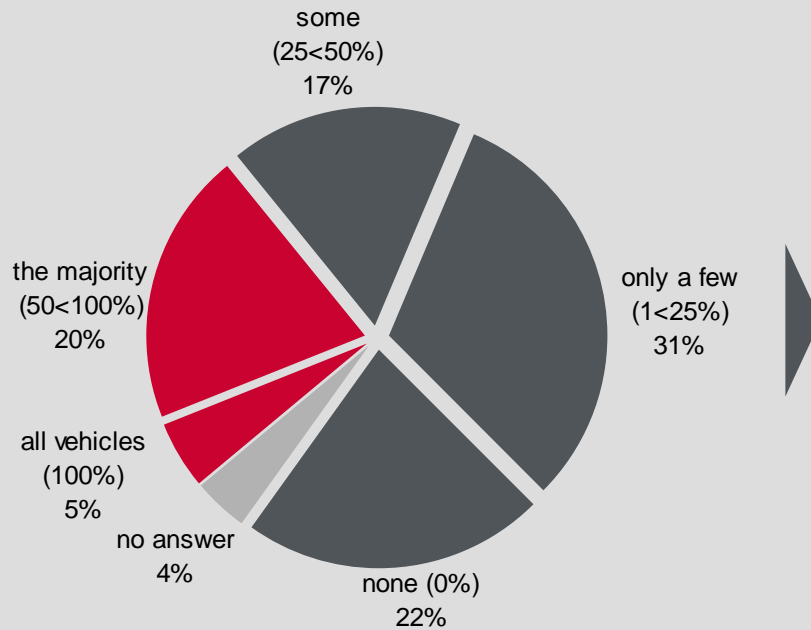


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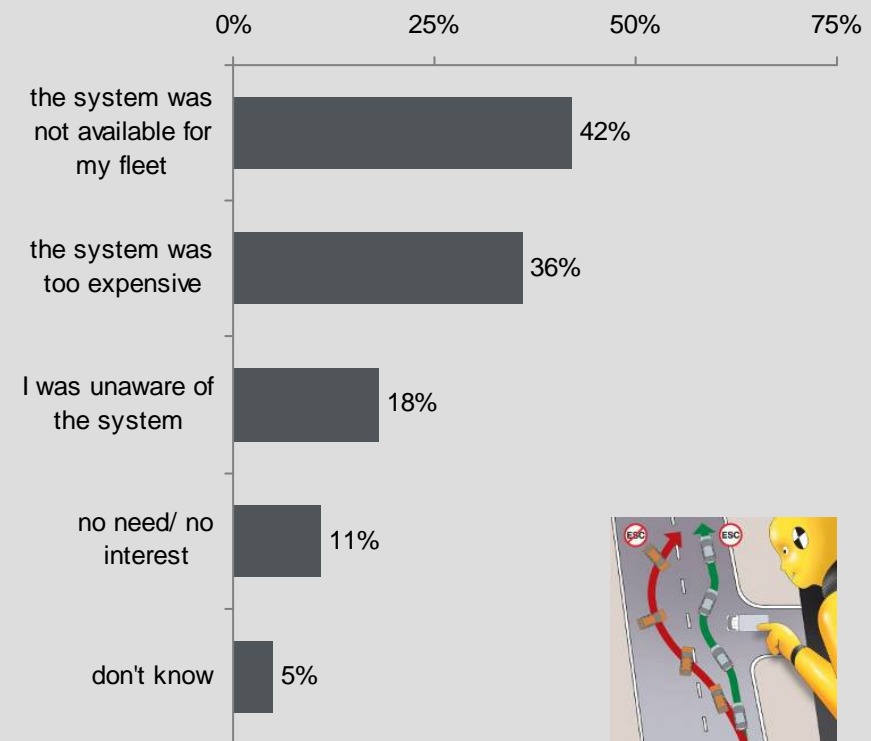
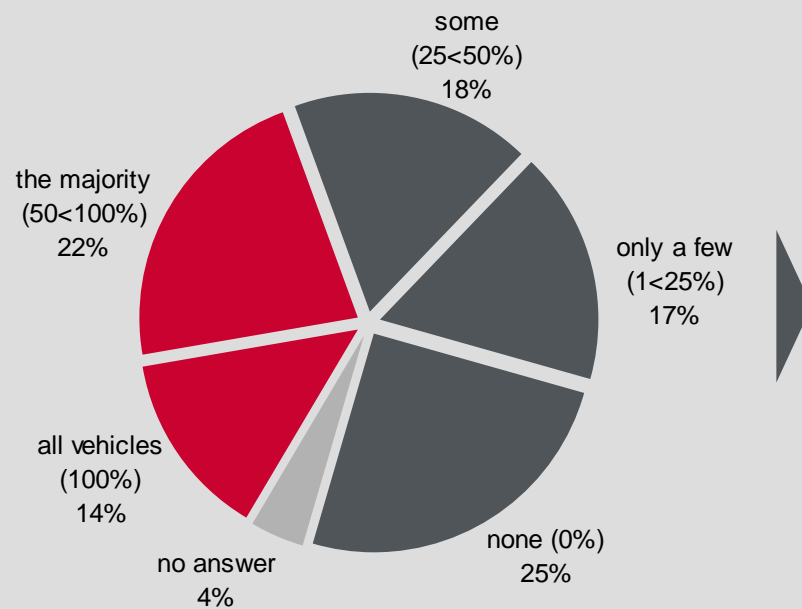


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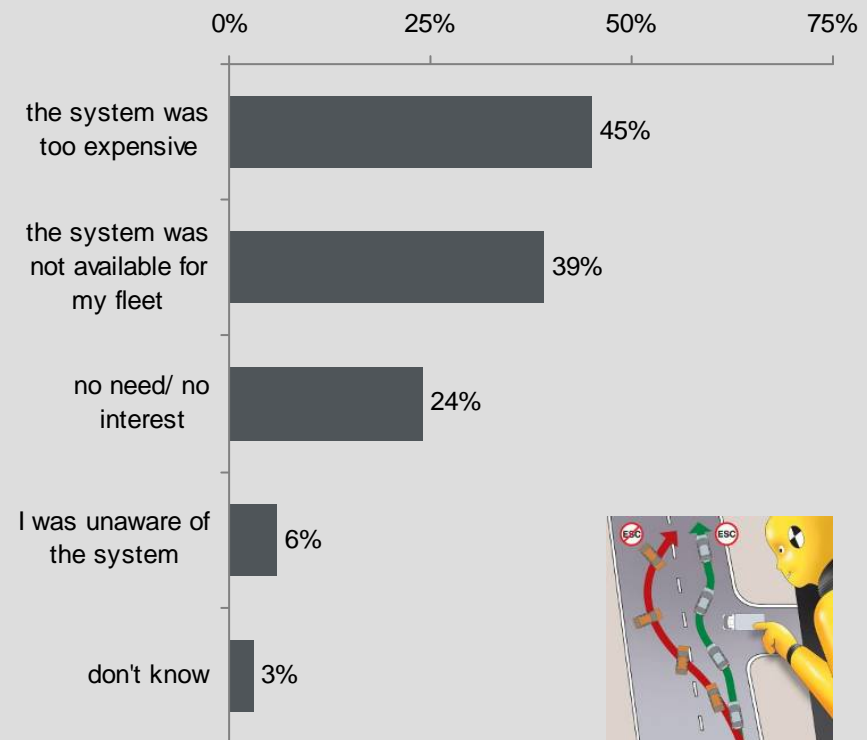
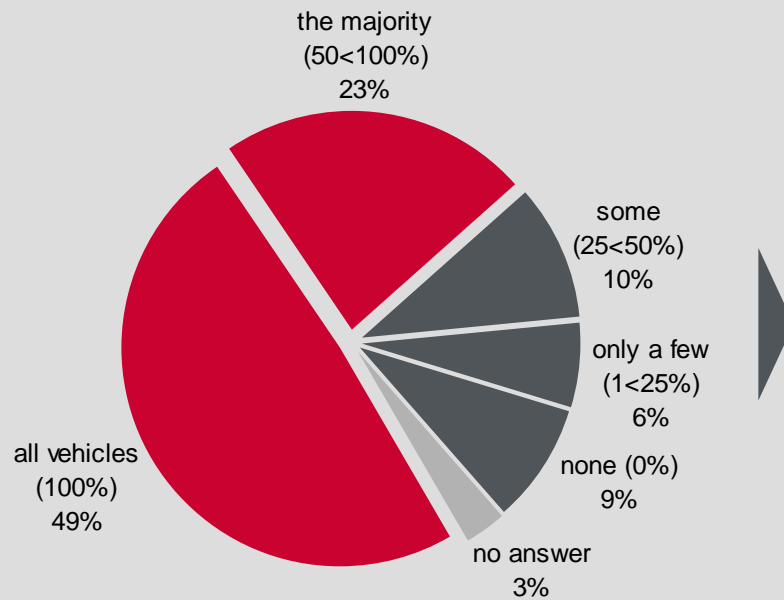
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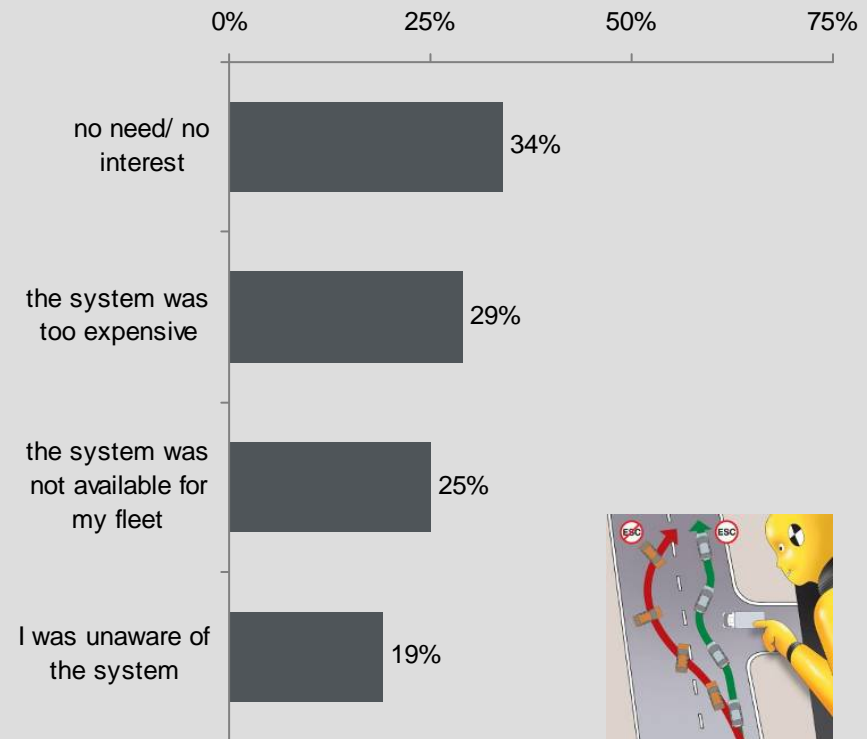
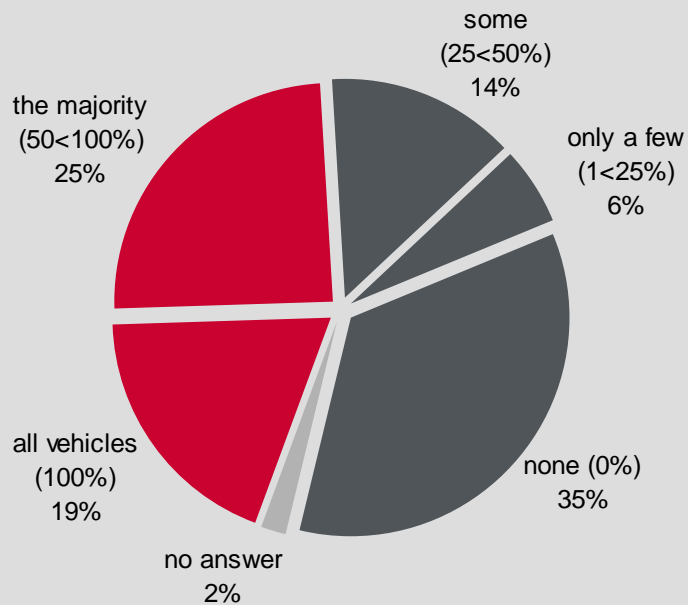


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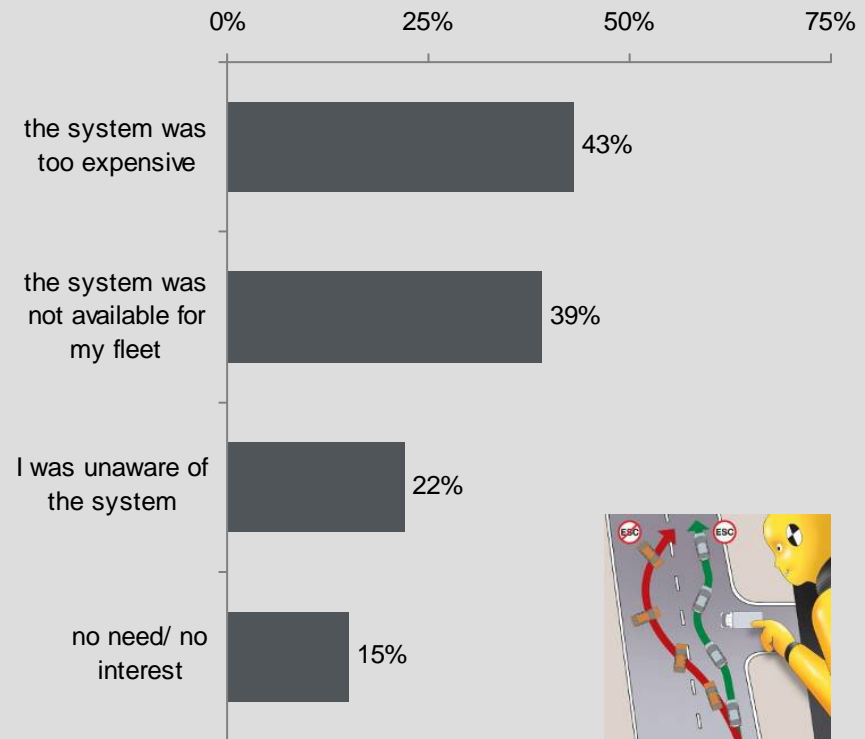
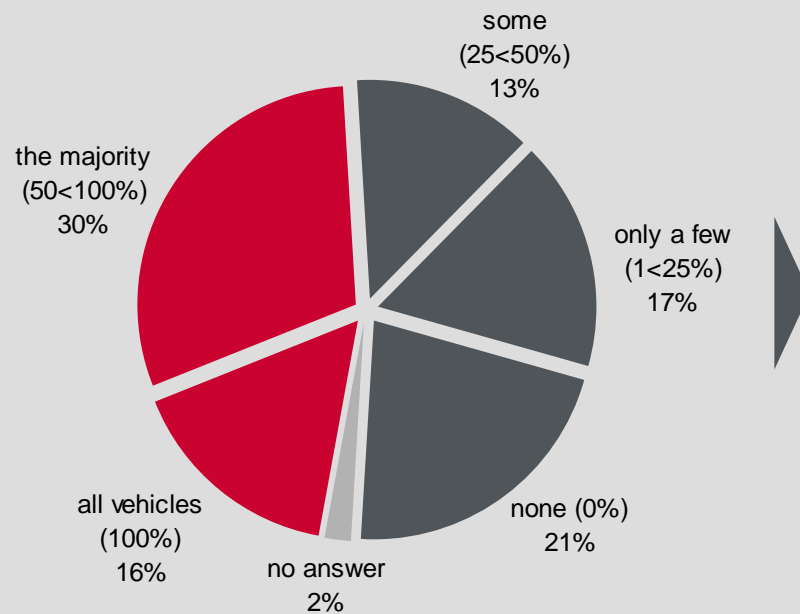


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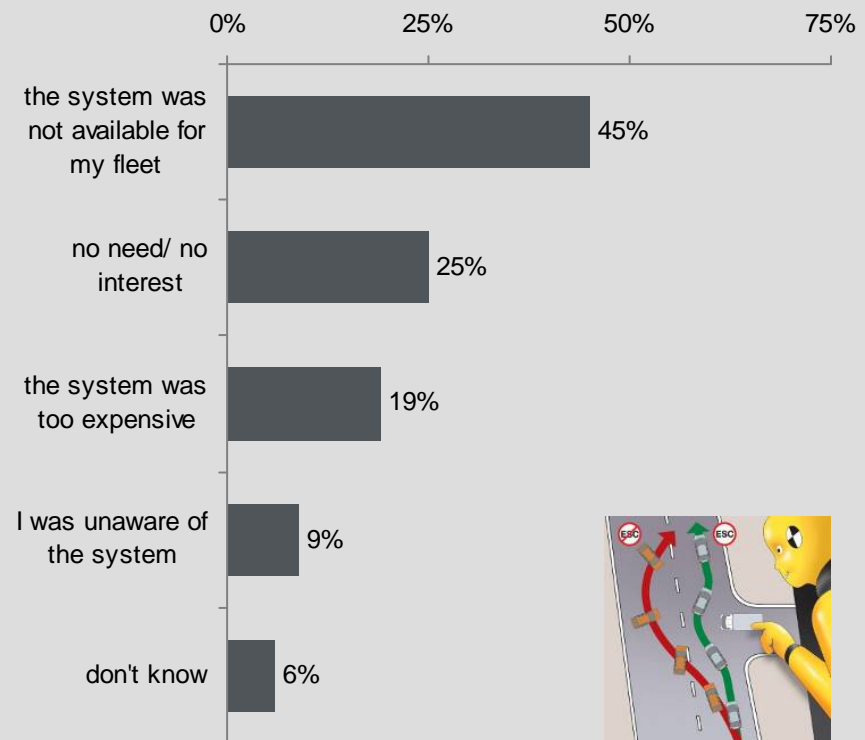
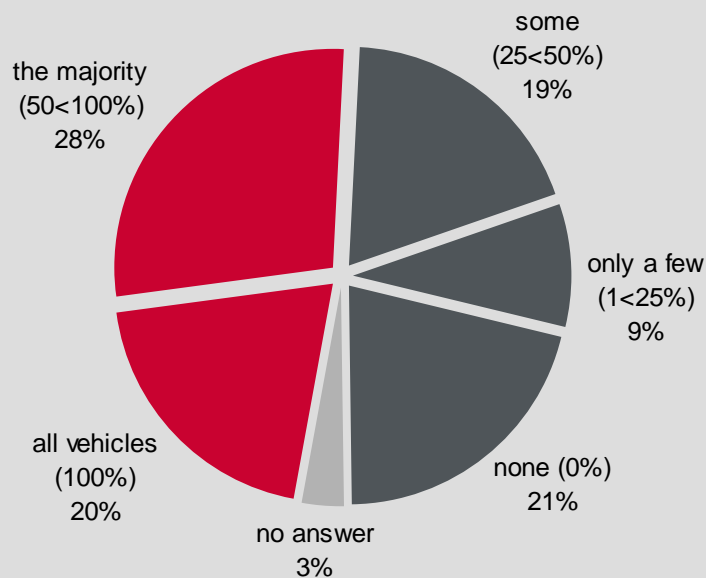
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Do you have Electronic Stability Control on your fleet?

Why is your fleet less or not equipped with Electronic Stability Control? (multiple answers possible; filter: only respondents with "<50%")



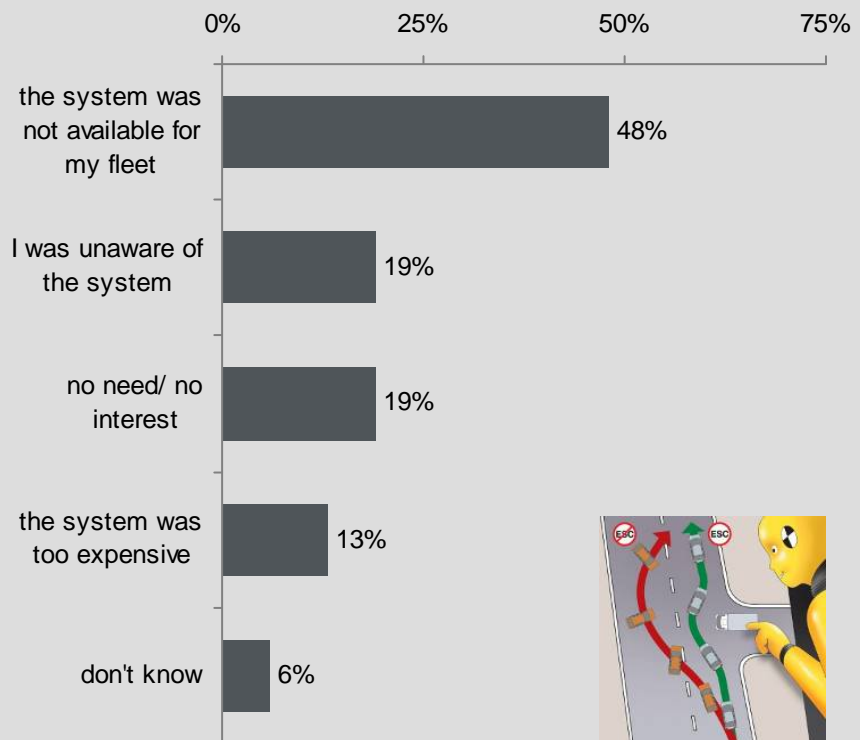
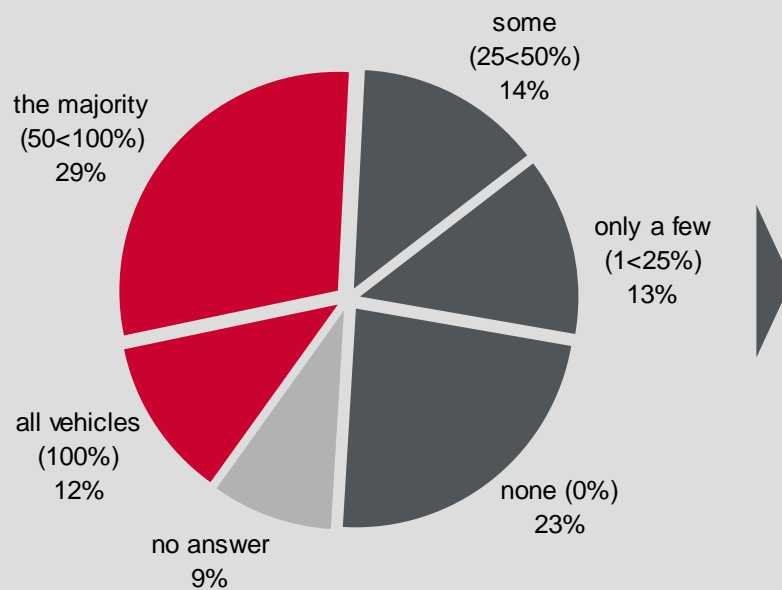
3.3 eSafety systems in fleets

3.3.1 Electronic Stability Control



Do you have Electronic Stability Control on your fleet?

Why is your fleet less or not equipped with Electronic Stability Control? (multiple answers possible; filter: only respondents with "<50%")



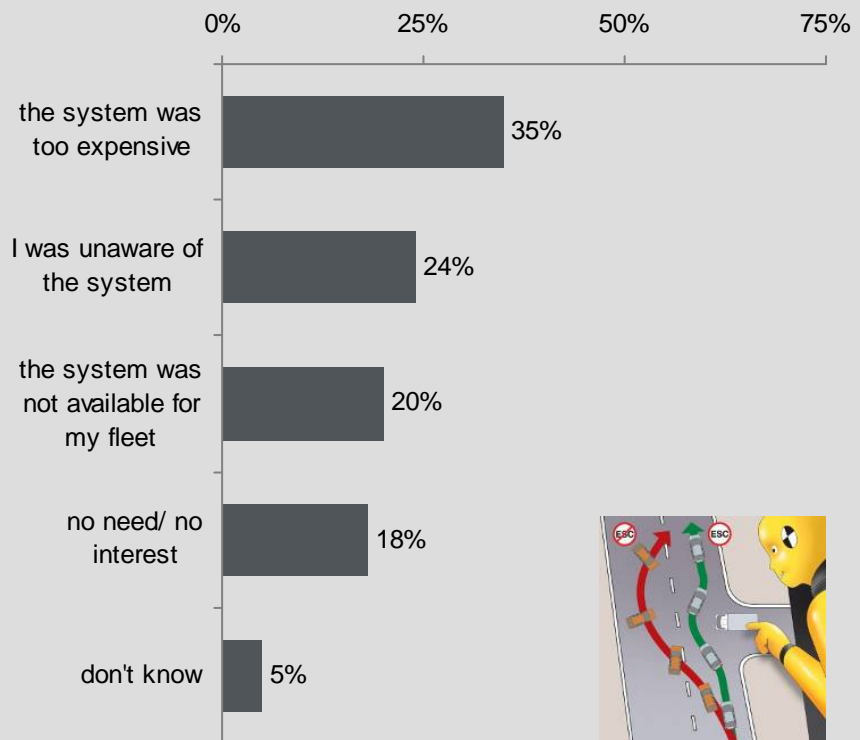
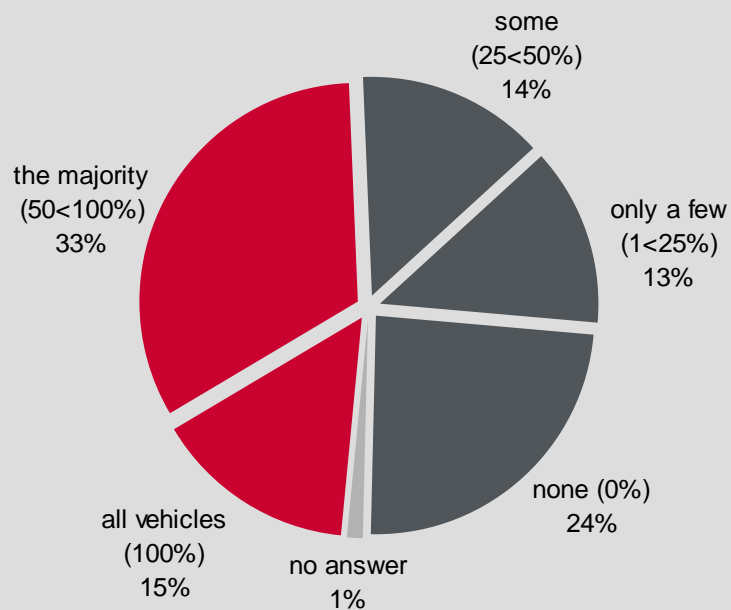
3.3 eSafety systems in fleets

3.3.1 Electronic Stability Control



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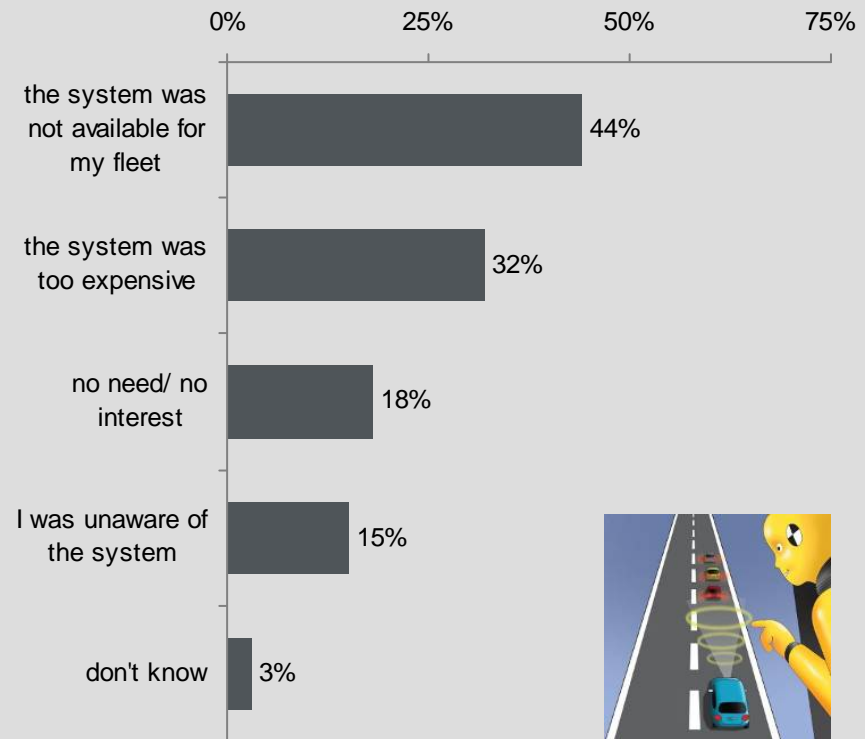
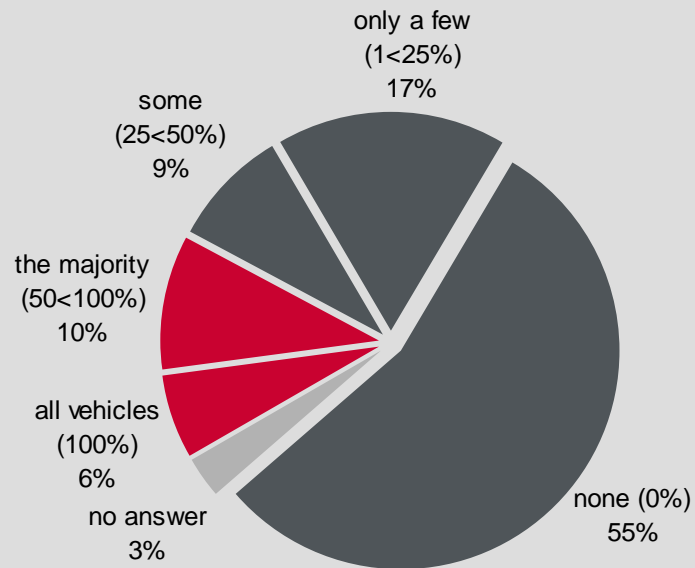
1. Background and methodological design
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 - 3.3.1 Electronic Stability Control
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 - 3.3.6 Adaptive Headlights
 - 3.4 Potential meaning and influence of eSafety systems
 - 3.5 Preferences in information and communication

3.3 eSafety systems in fleets

3.3.2 Advanced Emergency Braking

Do you have Advanced Emergency Braking on your fleet?

Why is your fleet less or not equipped with Advanced Emergency Braking? (multiple answers possible; filter: only respondents with "<50%")

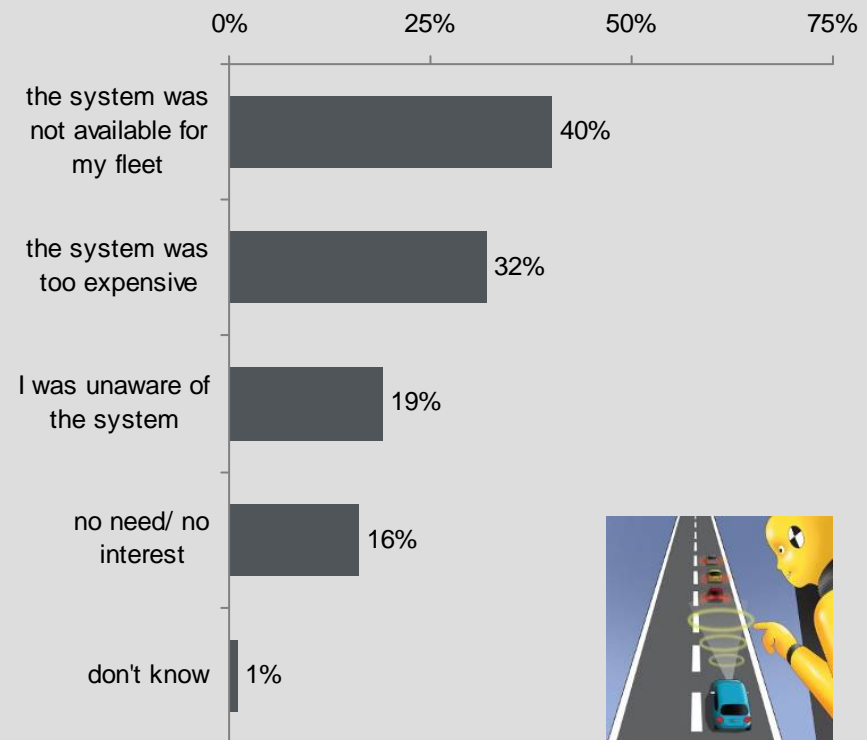
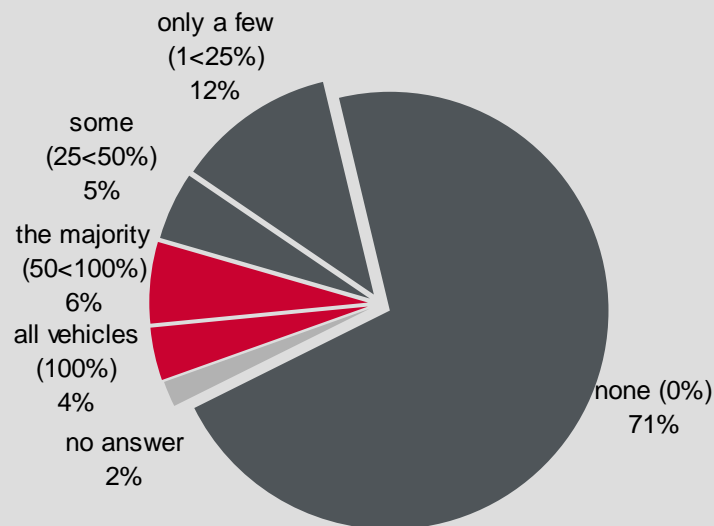


3.3 eSafety systems in fleets

3.3.2 Advanced Emergency Braking

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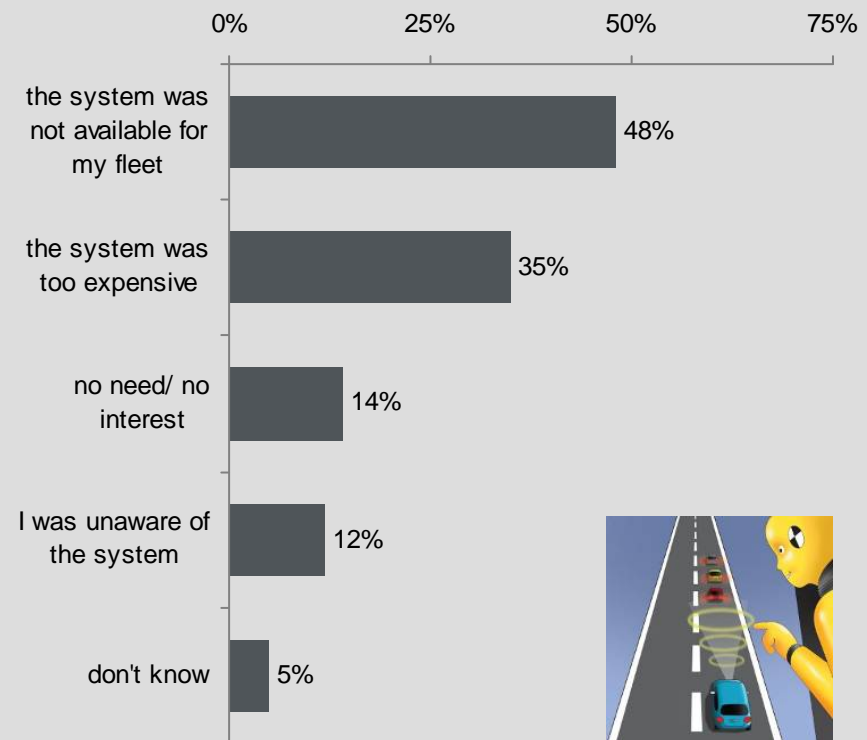
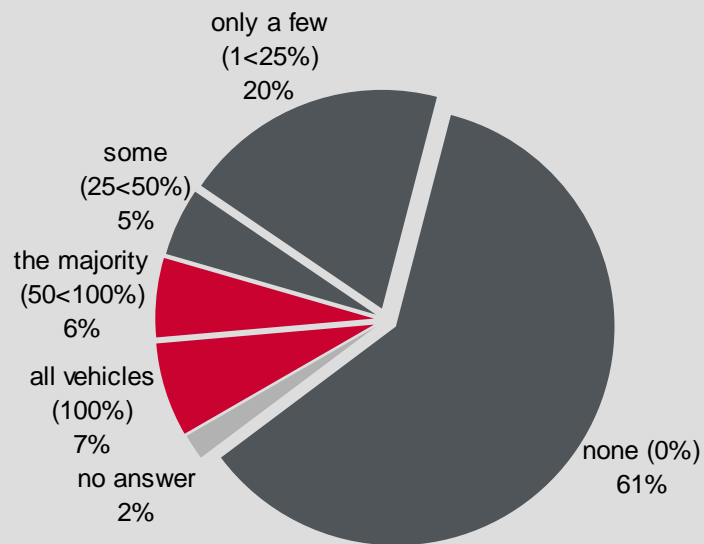
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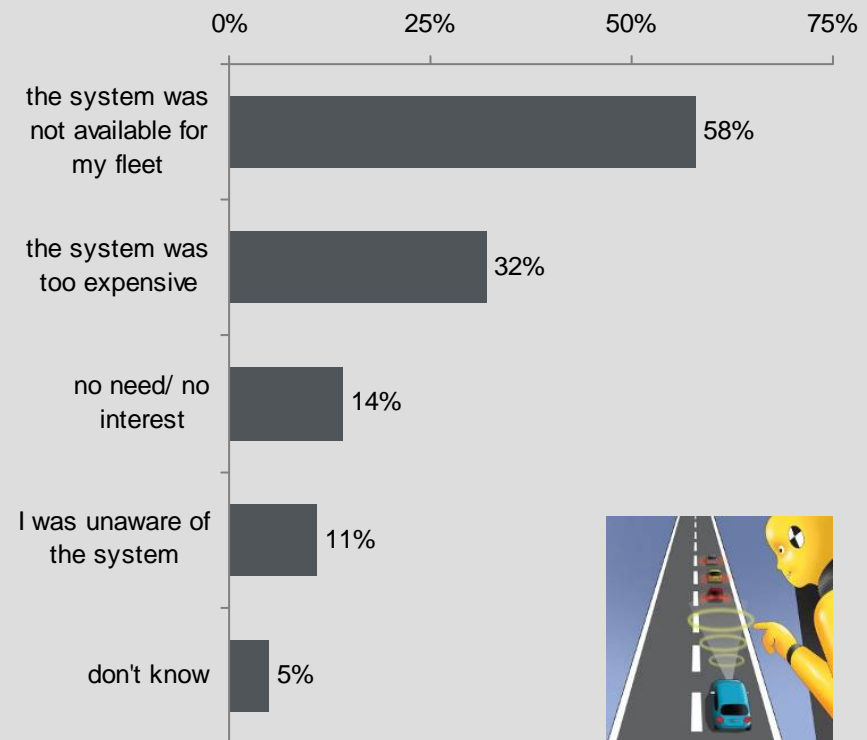
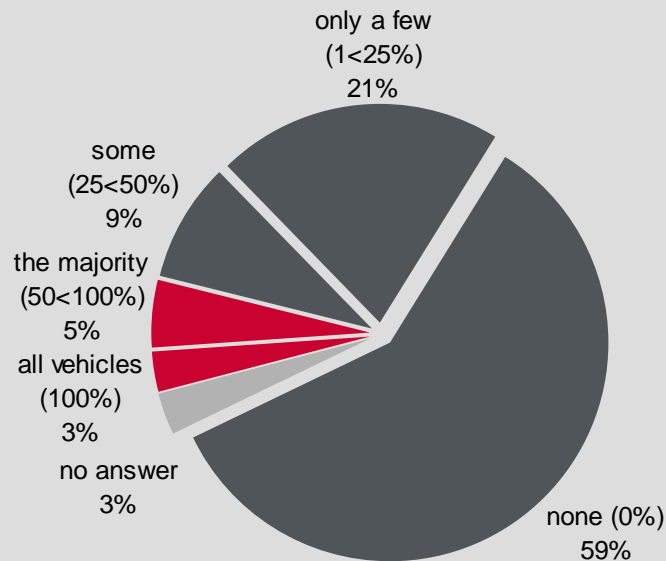


3.3 eSafety systems in fleets

3.3.2 Advanced Emergency Braking

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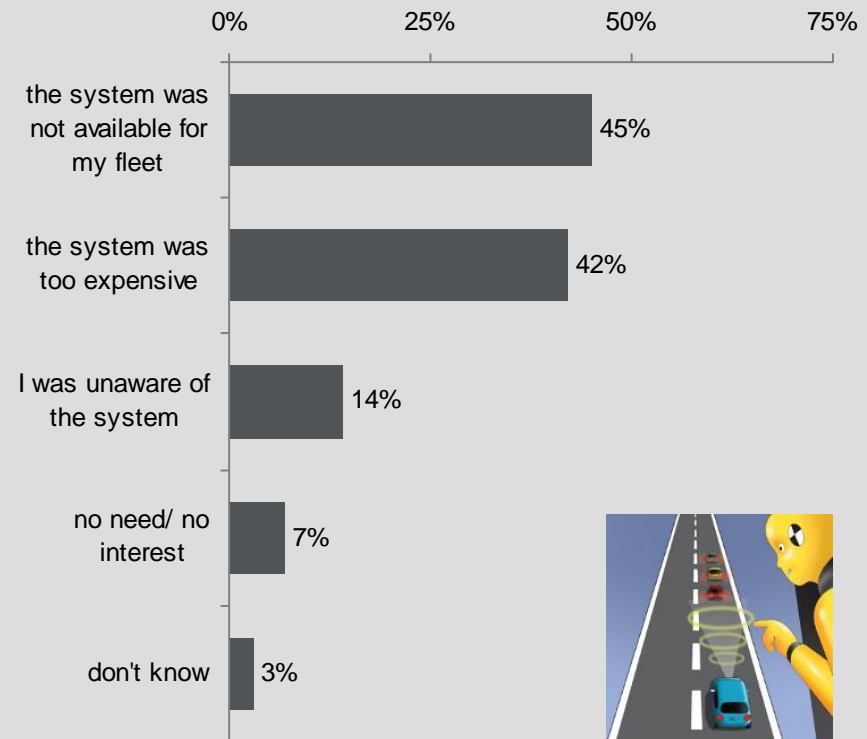
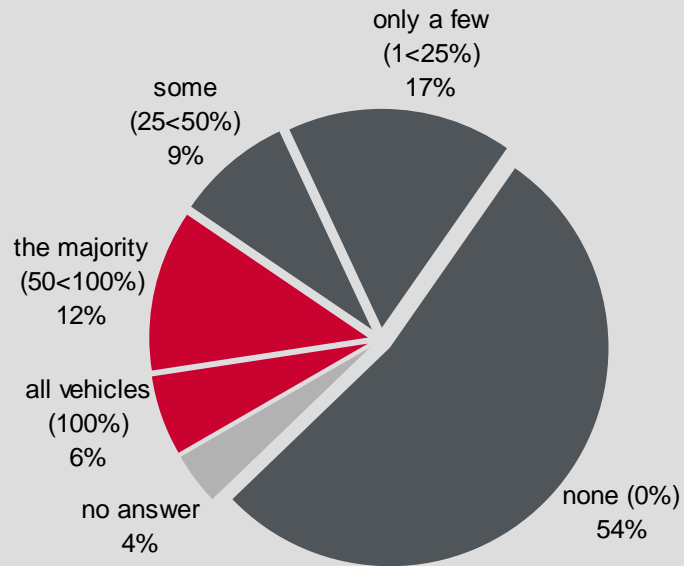


3.3 eSafety systems in fleets

3.3.2 Advanced Emergency Braking

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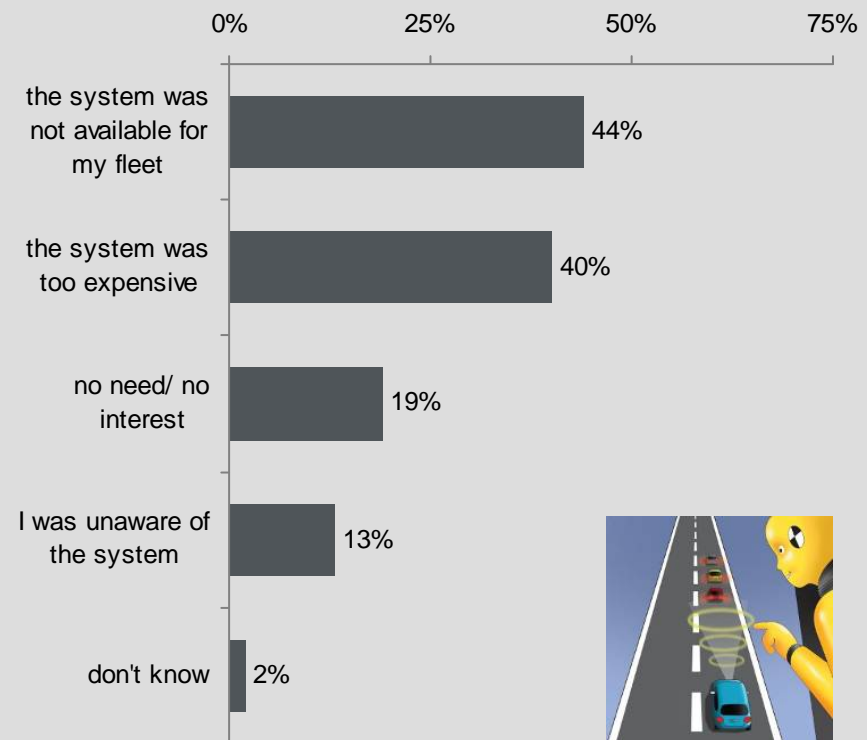
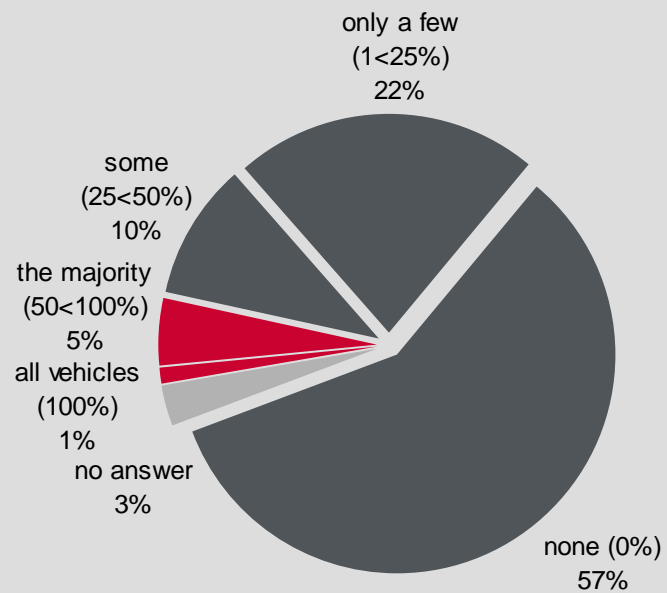
3.3 eSafety systems in fleets

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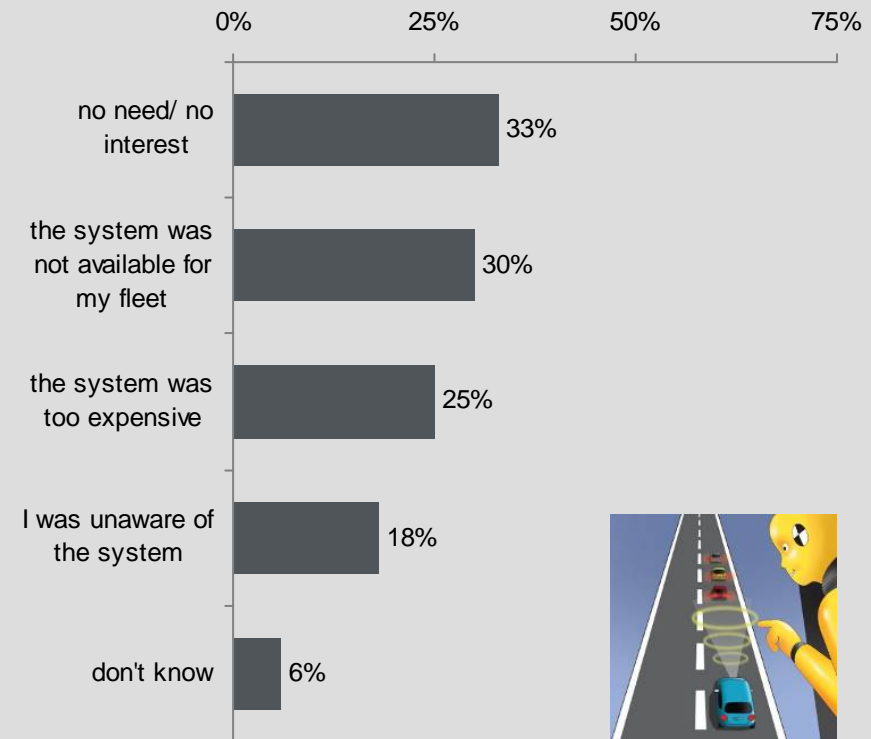
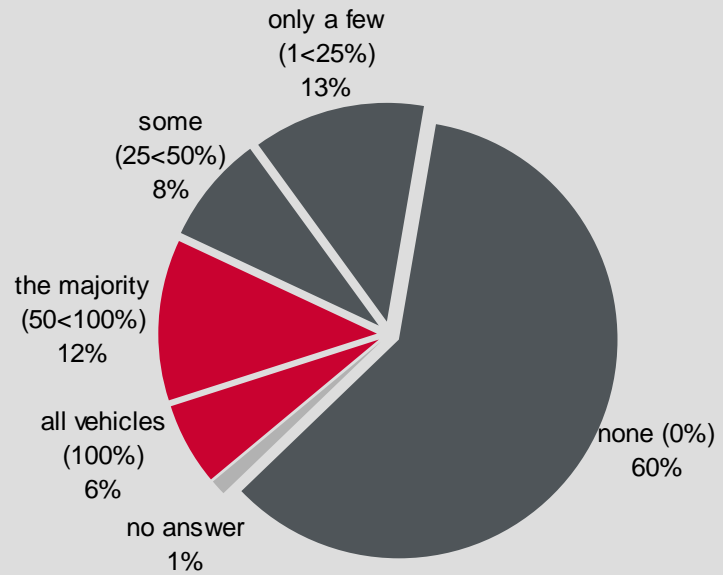


3.3 eSafety systems in fleets

3.3.2 Advanced Emergency Braking

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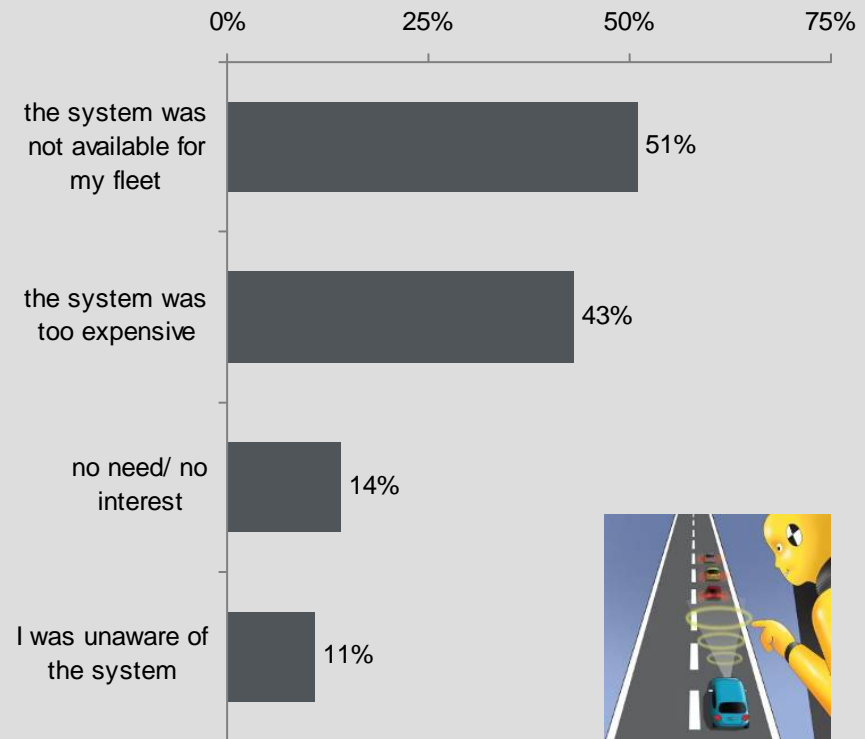
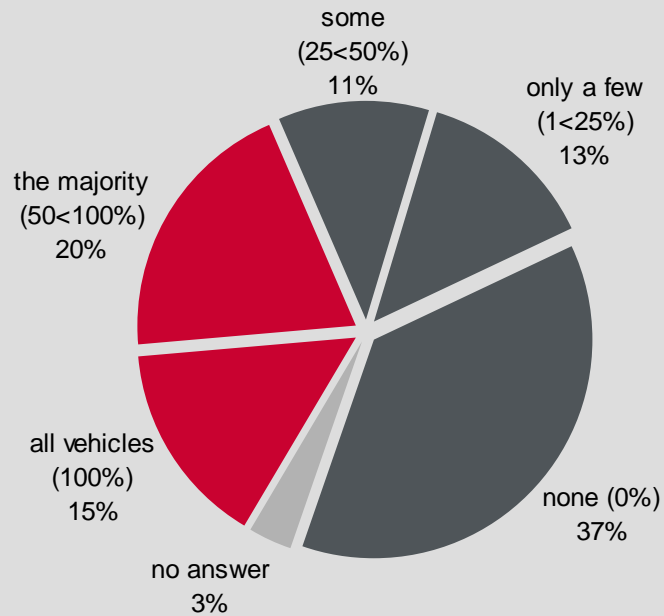


3.3 eSafety systems in fleets

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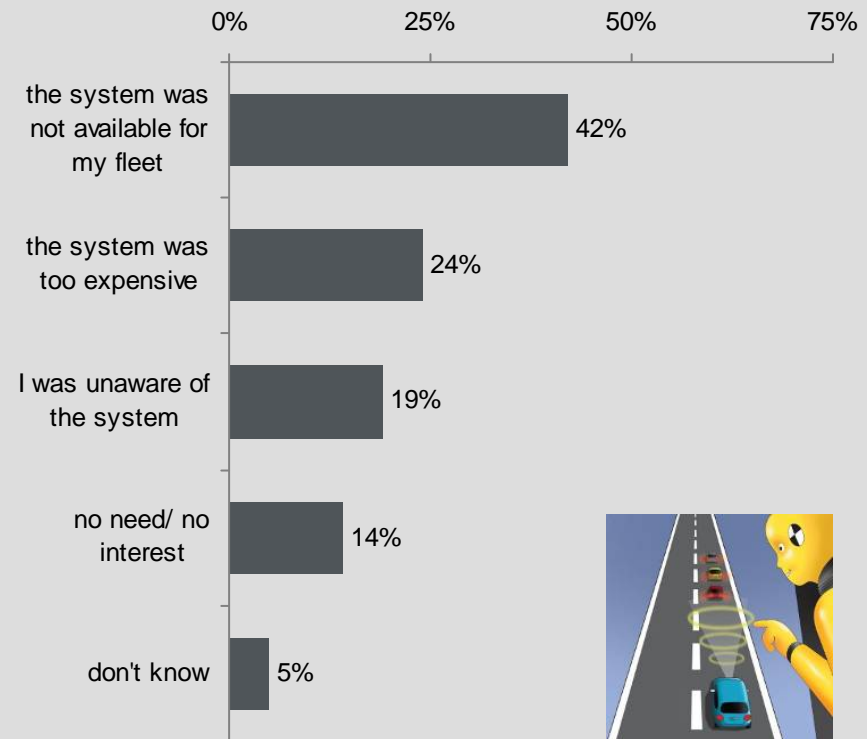
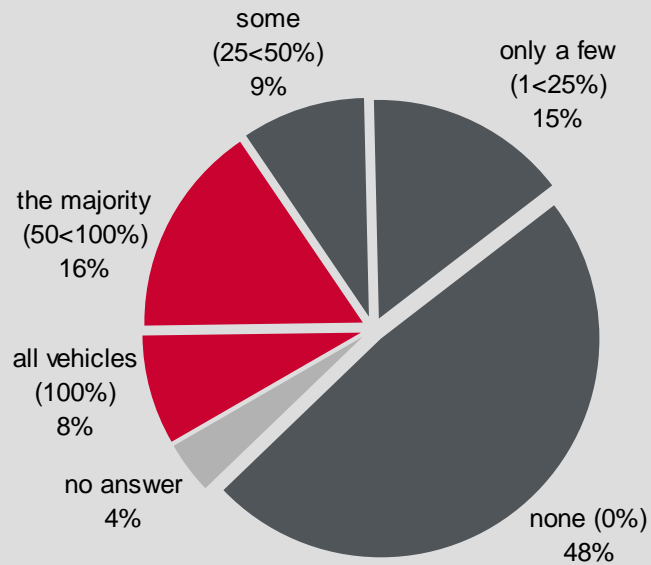
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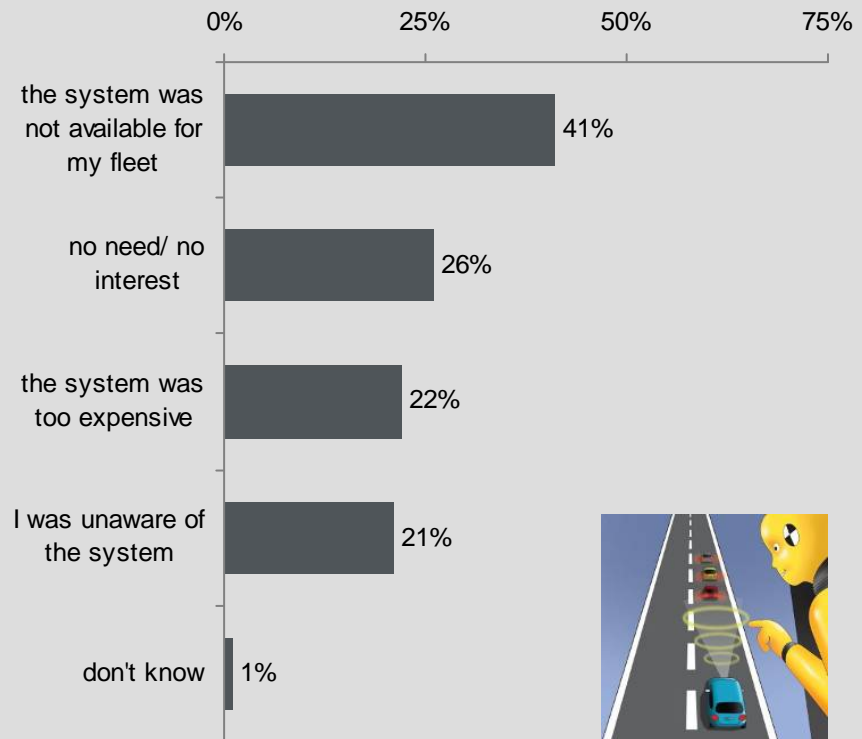
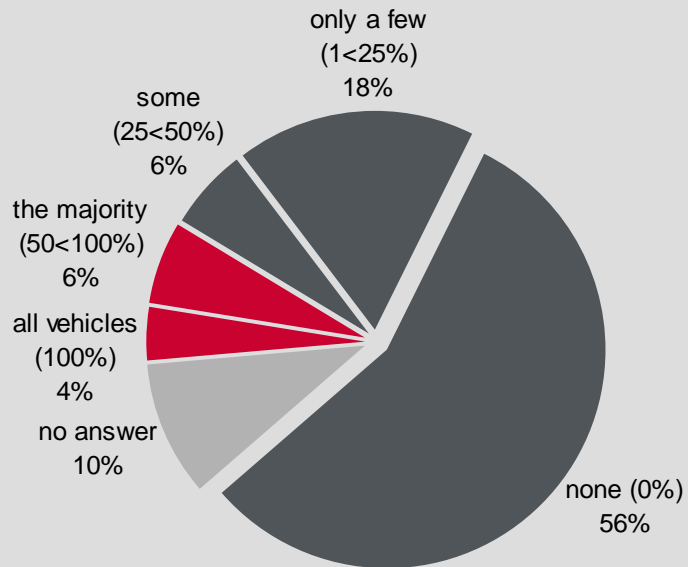
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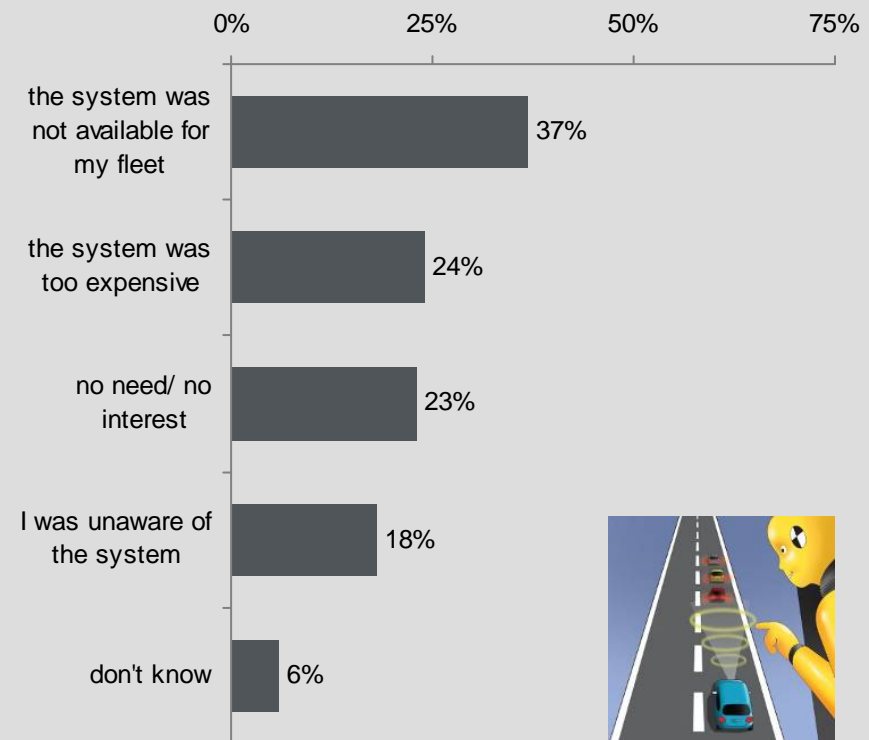
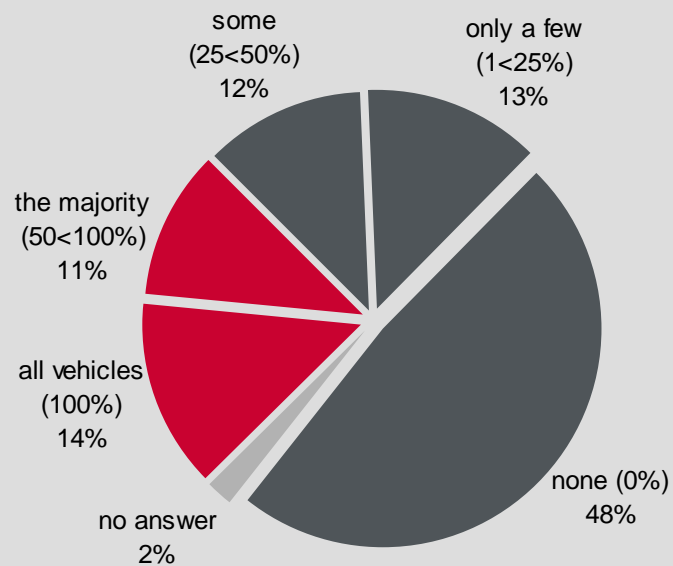
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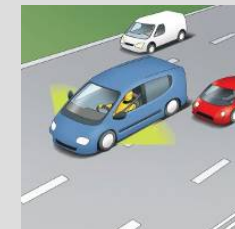
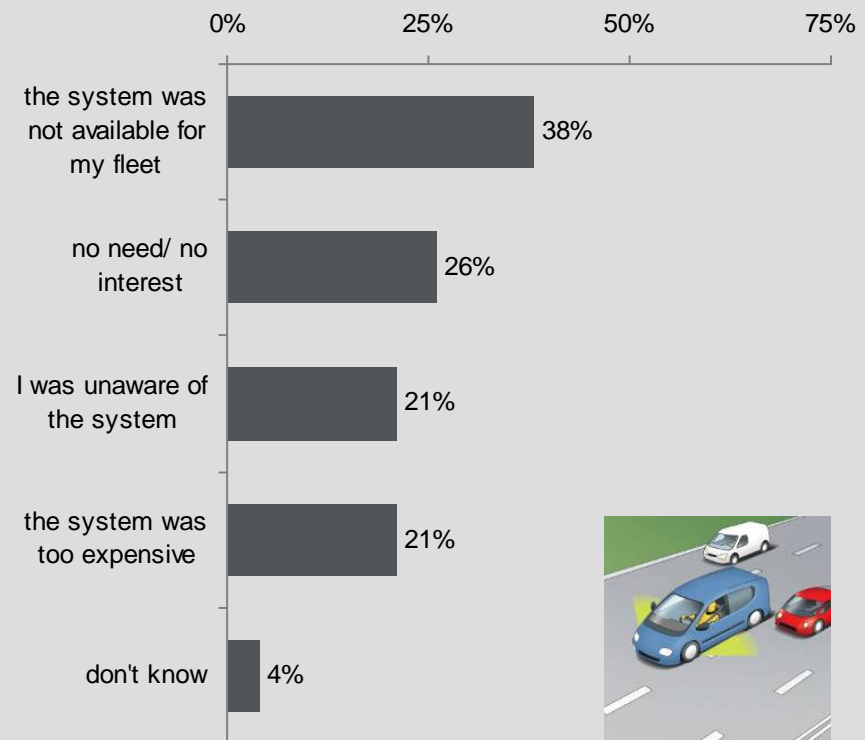
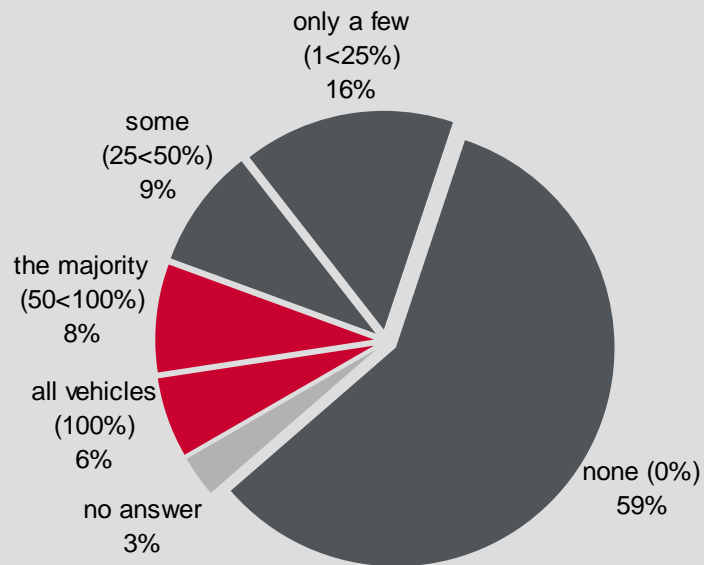
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3.3 eSafety systems in fleets

3.3.3 Blind Spot Monitoring

Do you have Blind Spot Monitoring on your fleet?

Why is your fleet less or not equipped with Blind Spot Monitoring? (multiple answers possible; filter: only respondents with "<50%")

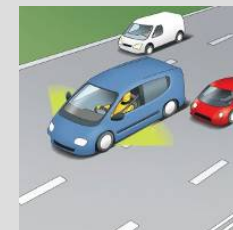
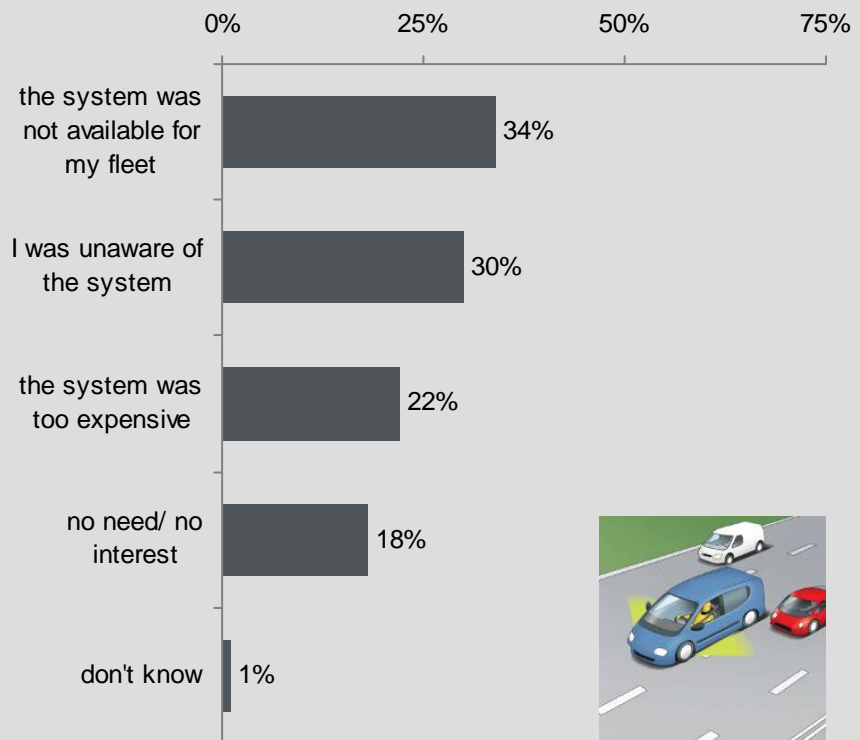
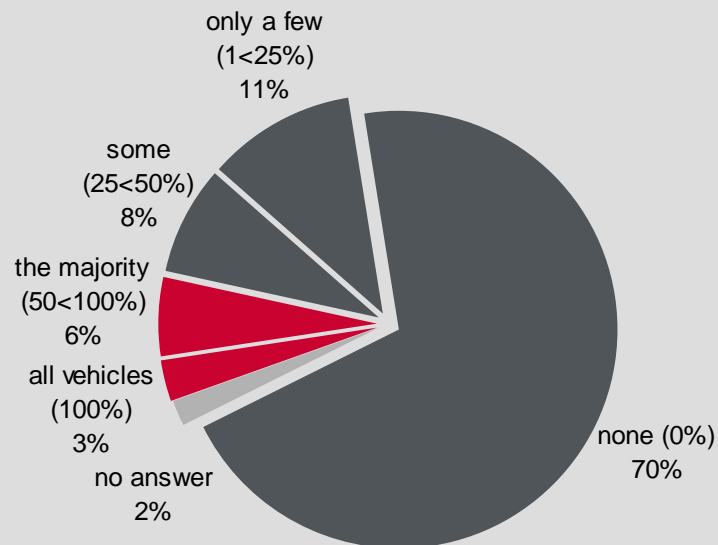


3.3 eSafety systems in fleets

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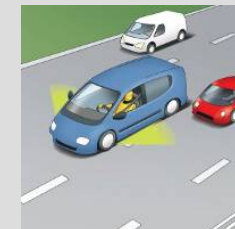
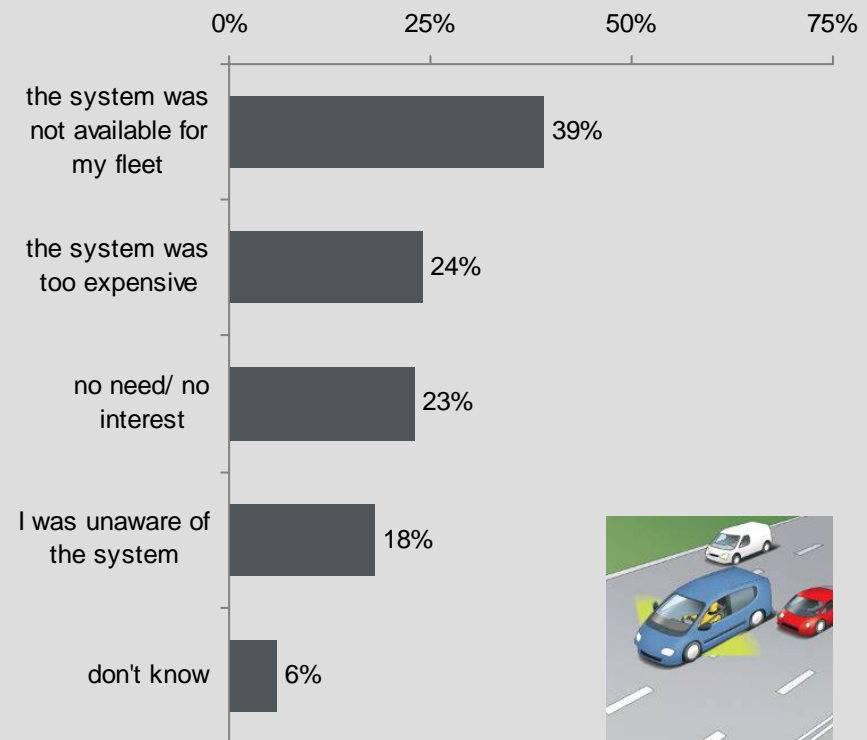
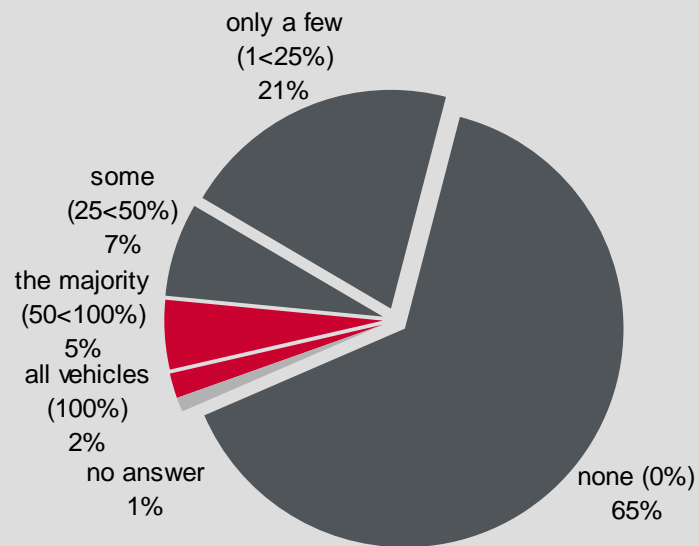


3.3 eSafety systems in fleets

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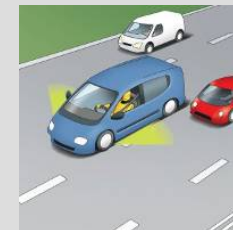
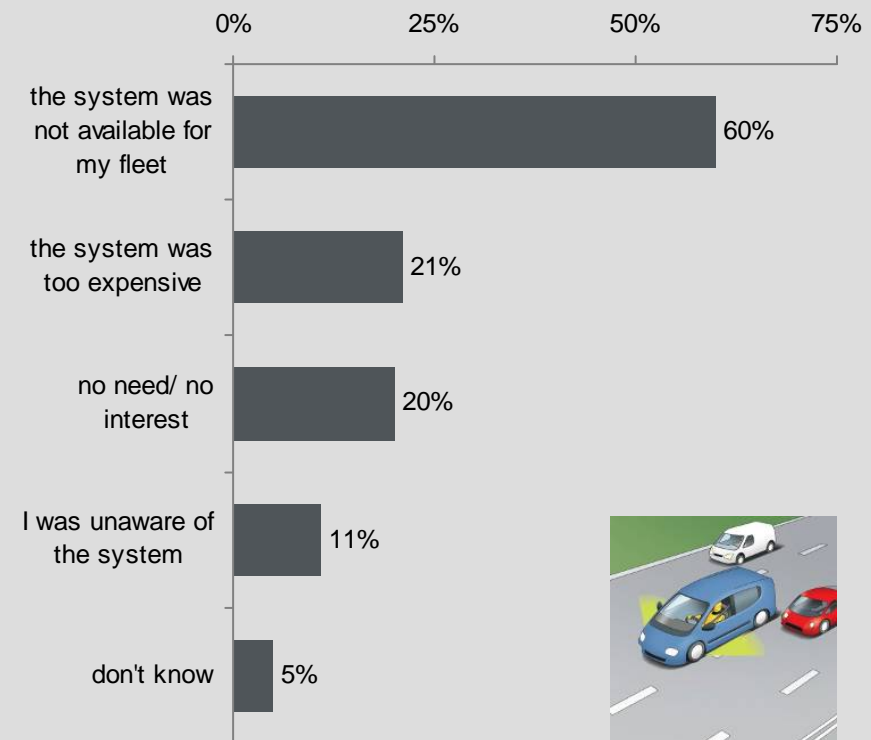
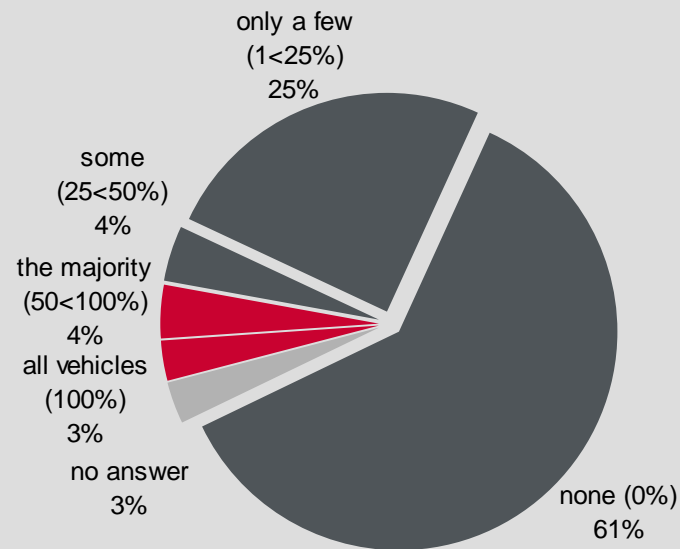


3.3 eSafety systems in fleets

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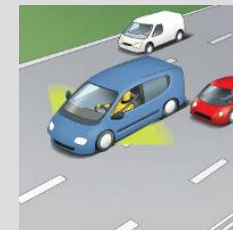
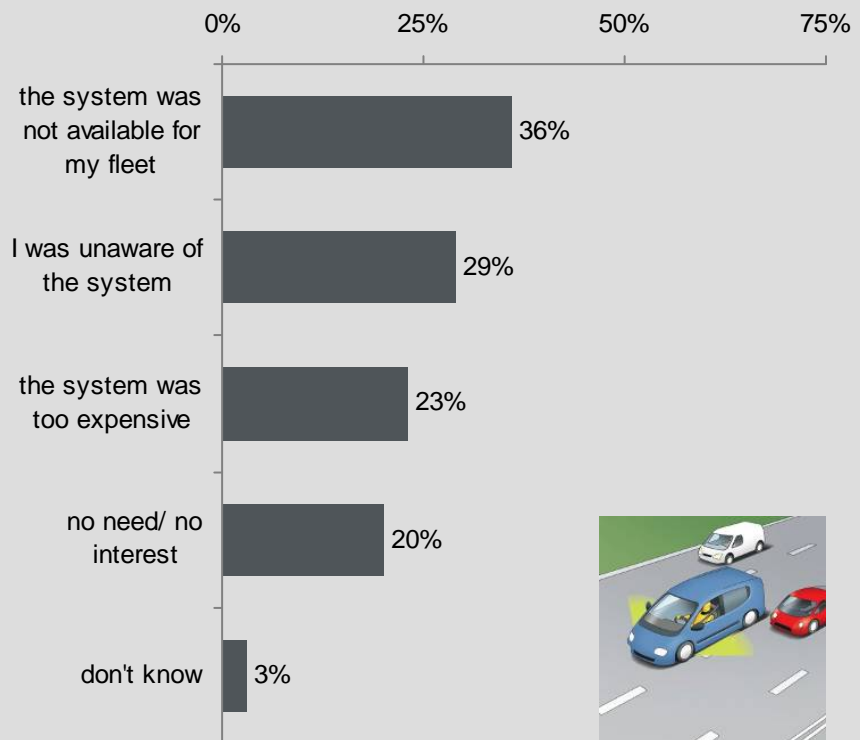
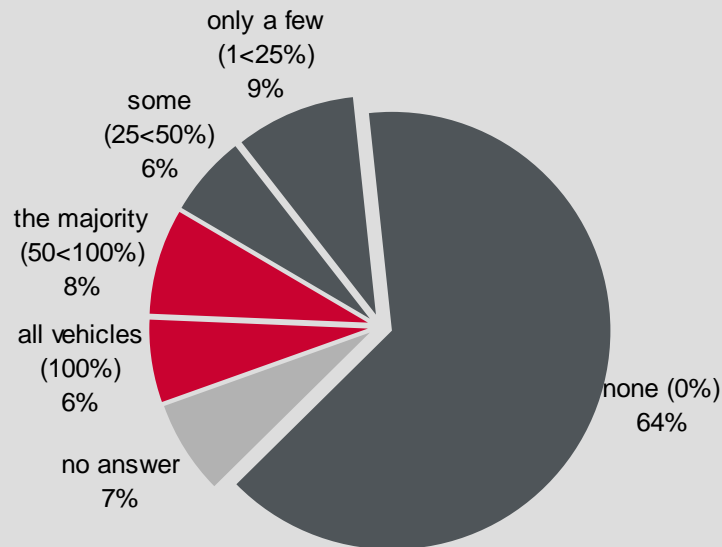


3.3 eSafety systems in fleets

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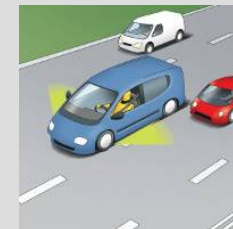
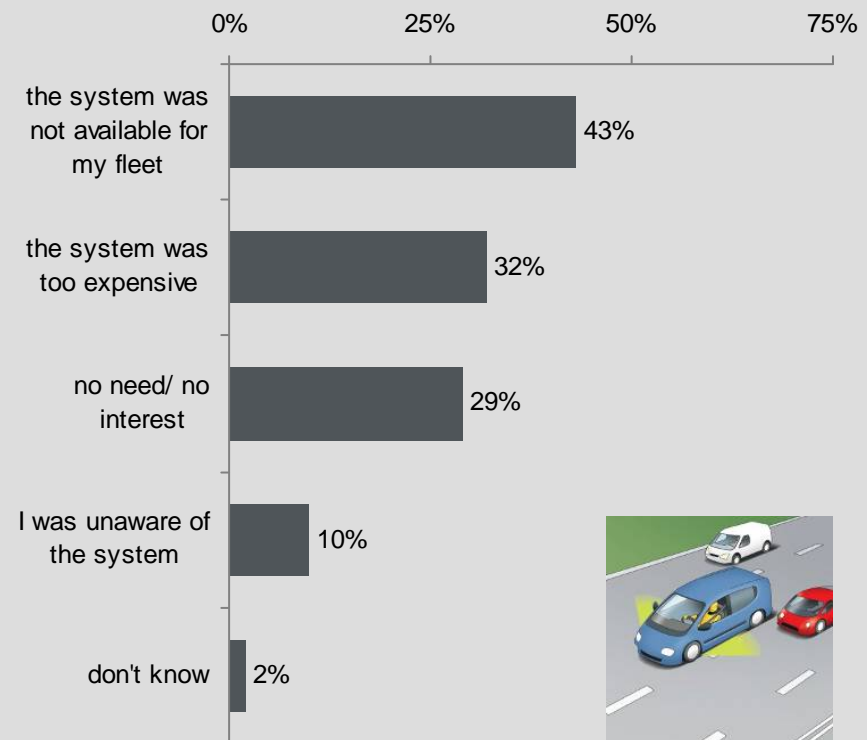
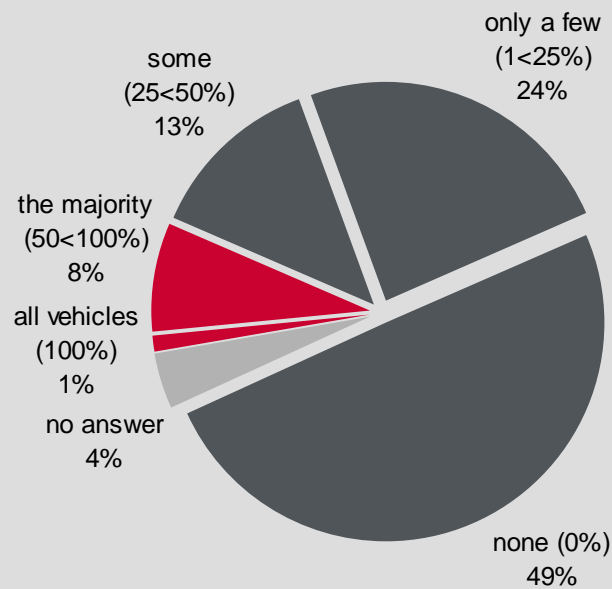
3.3 eSafety systems in fleets

3.3.3 Blind Spot Monitoring



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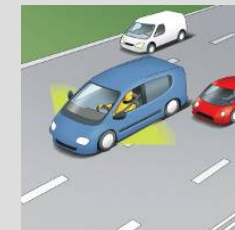
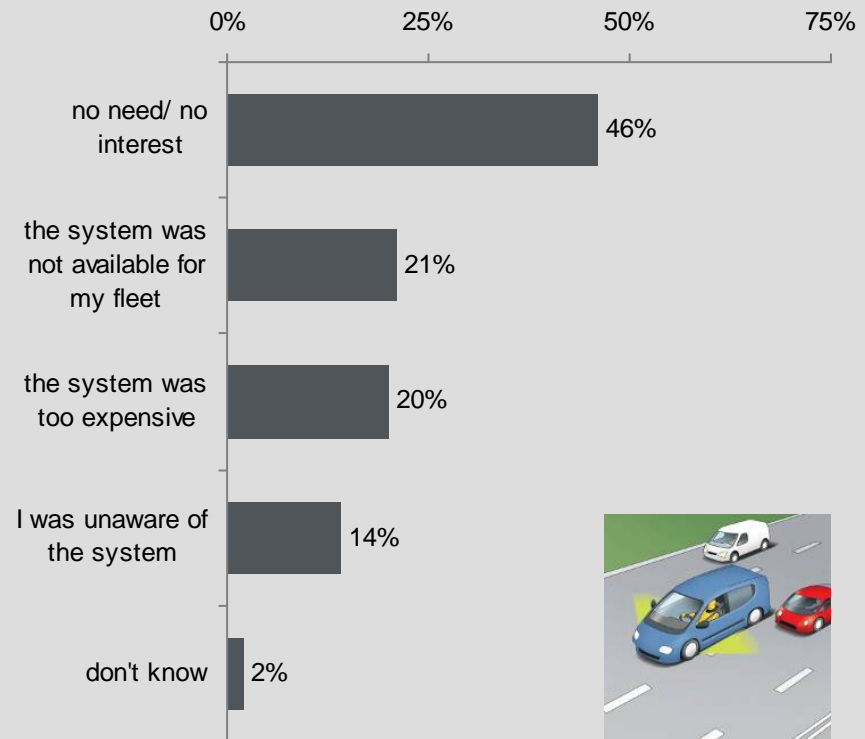
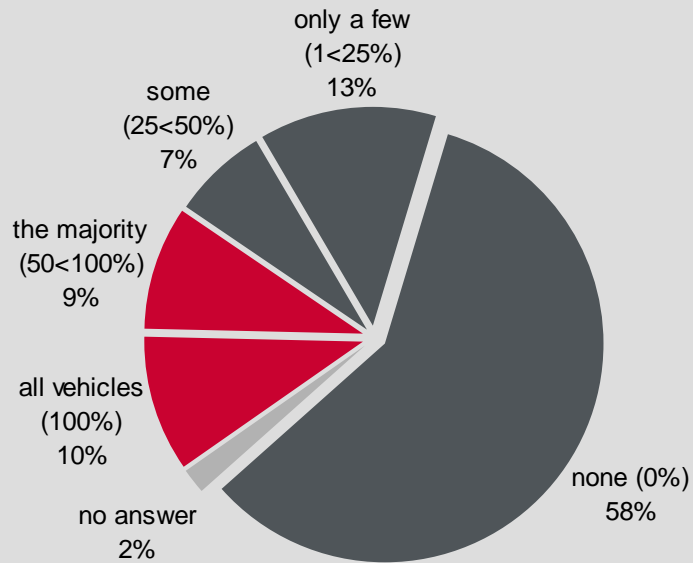


3.3 eSafety systems in fleets

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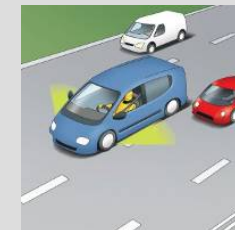
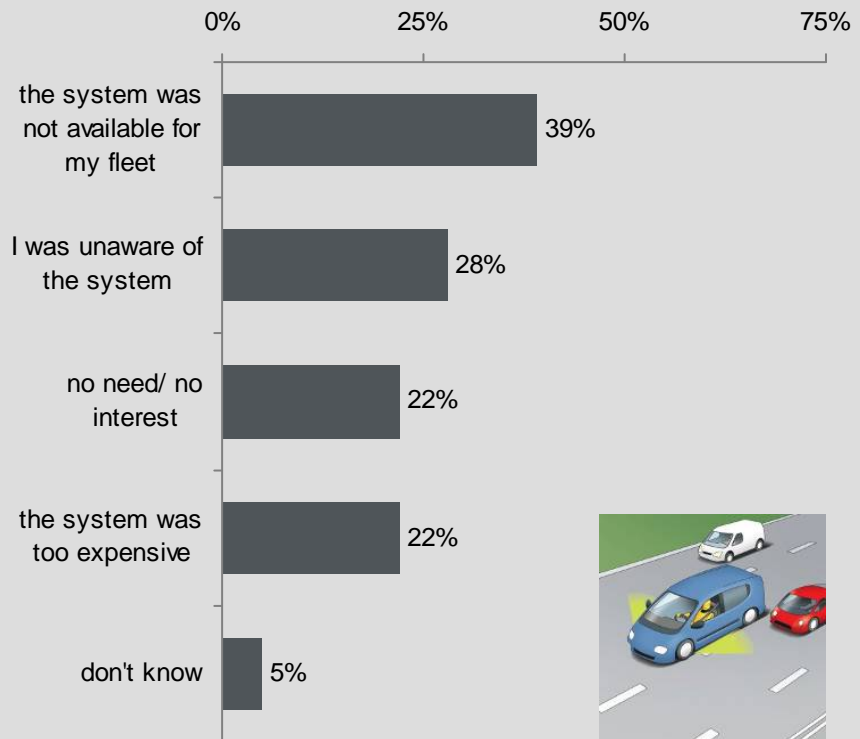
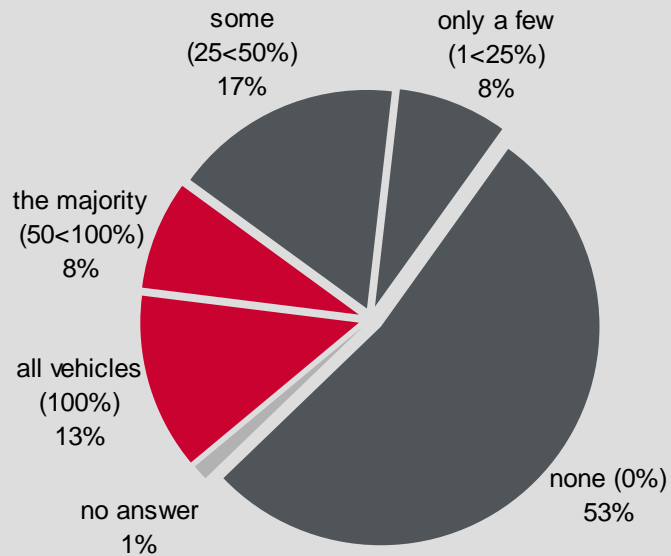


3.3 eSafety systems in fleets

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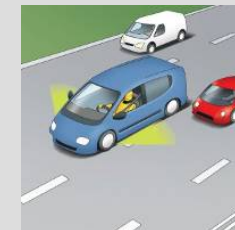
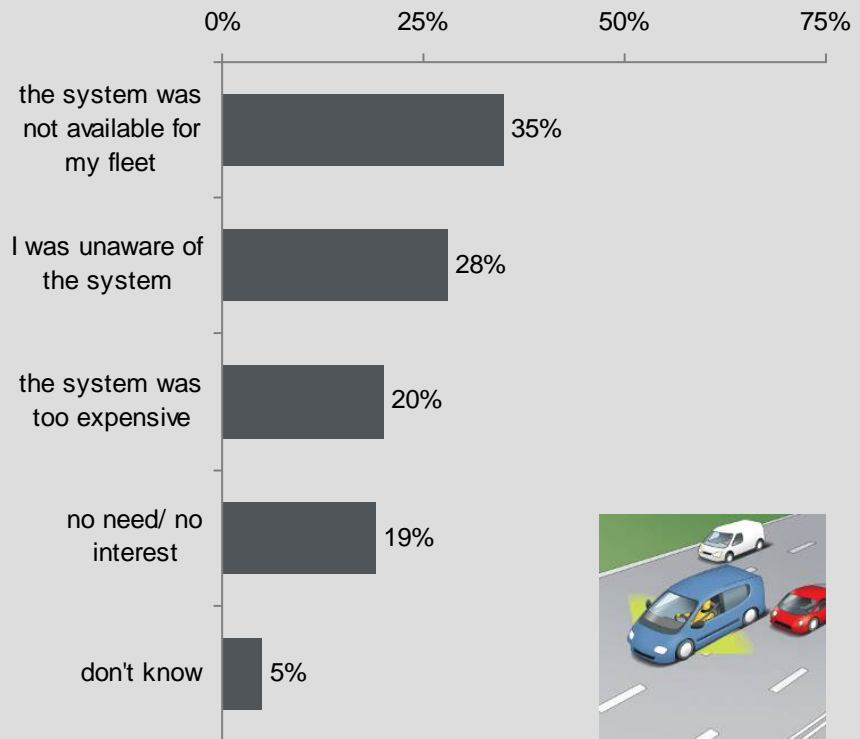
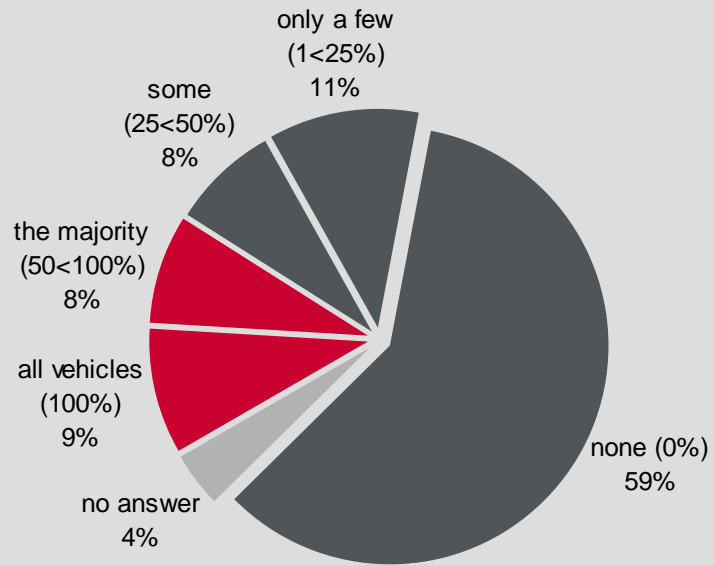
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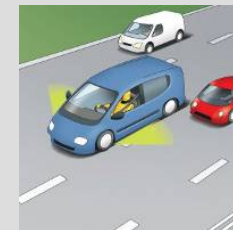
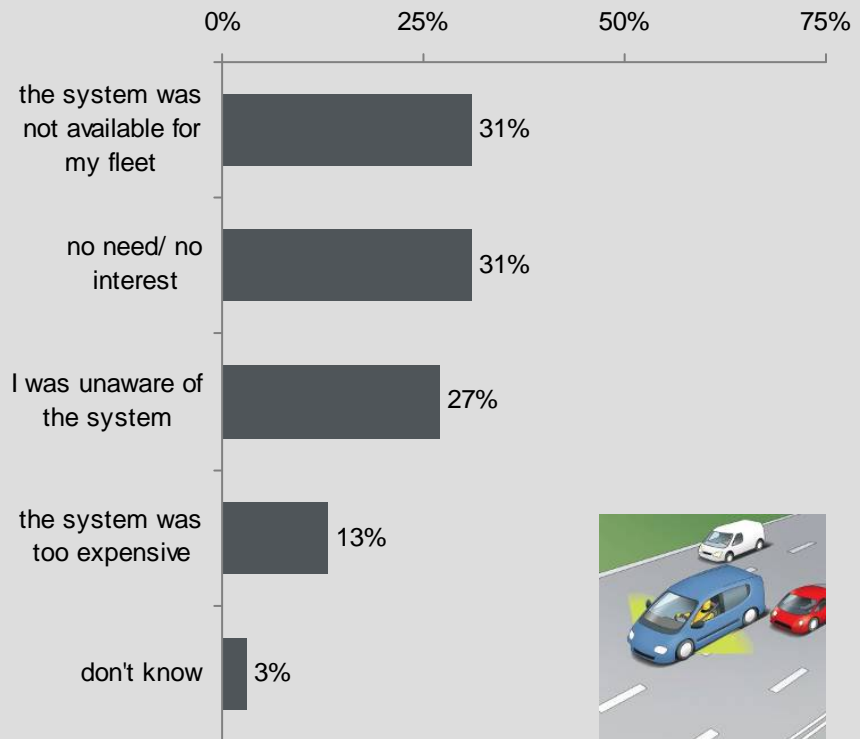
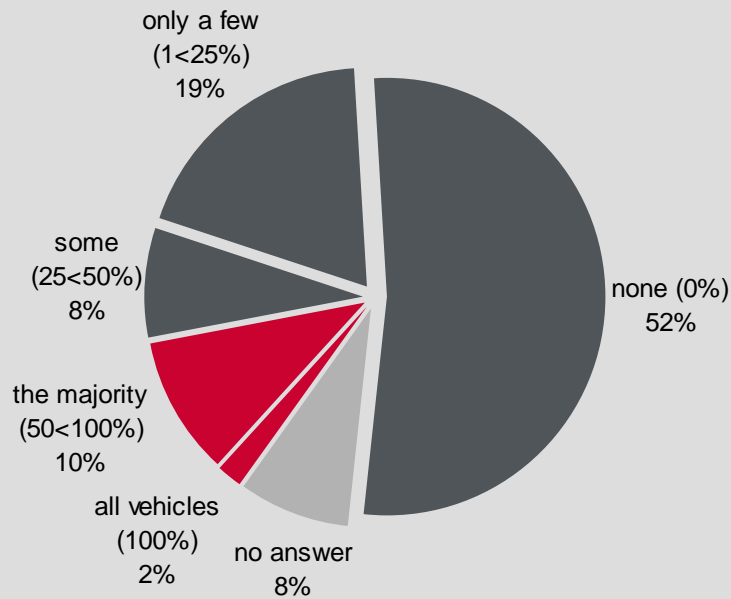
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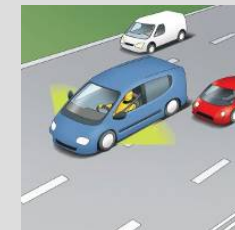
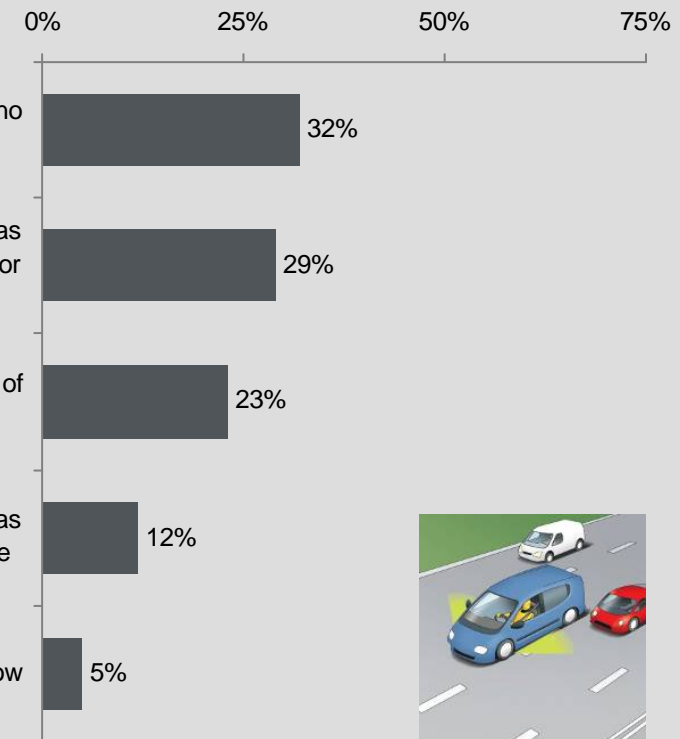
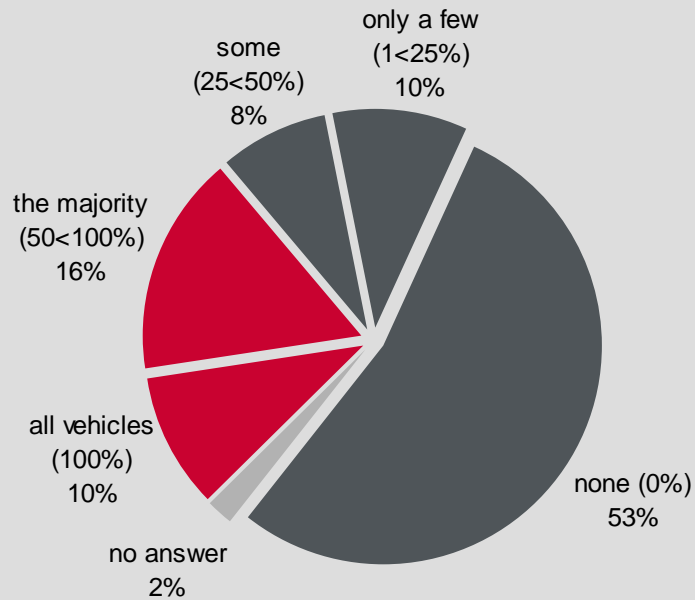
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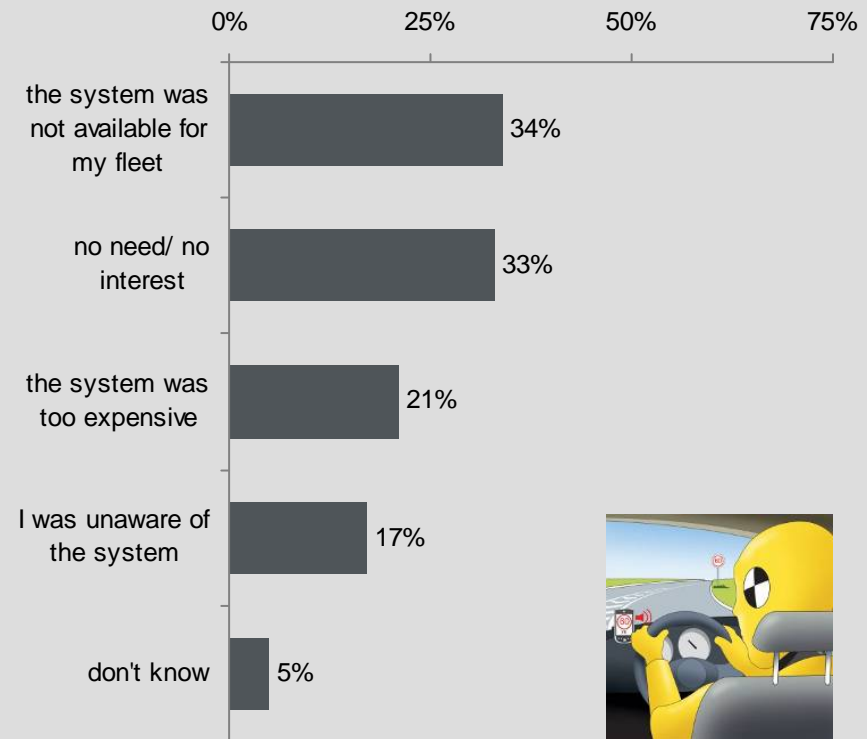
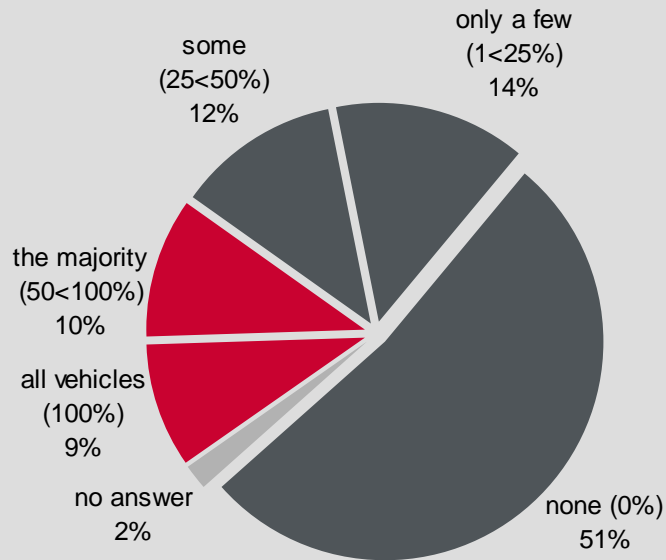
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3.3 eSafety systems in fleets

3.3.4 Speed Alert

Do you have Speed Alert on your fleet?

Why is your fleet less or not equipped with Speed Alert? (multiple answers possible; filter: only respondents with "<50%")

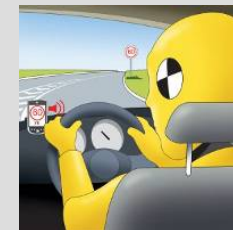
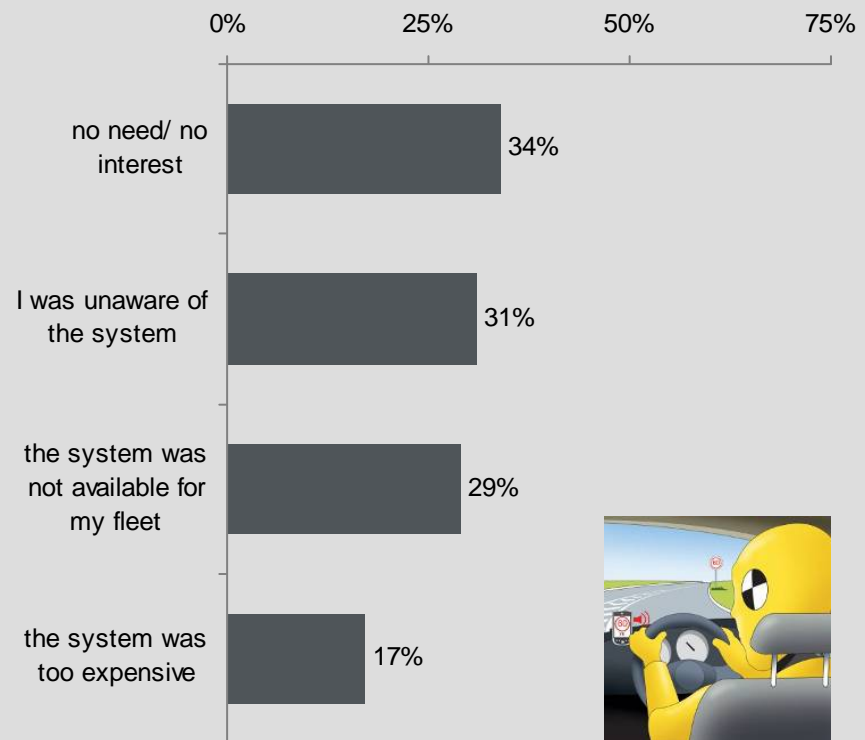
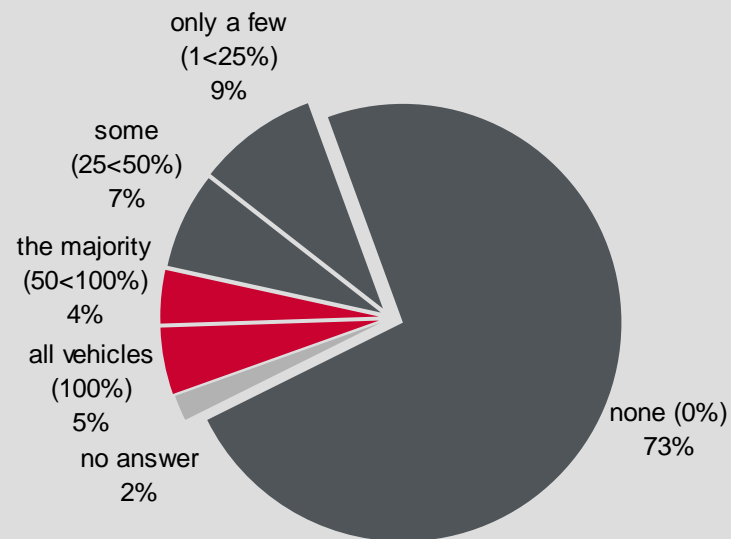


3.3 eSafety systems in fleets

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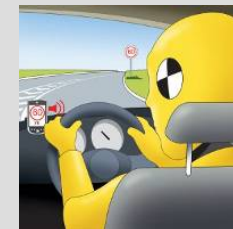
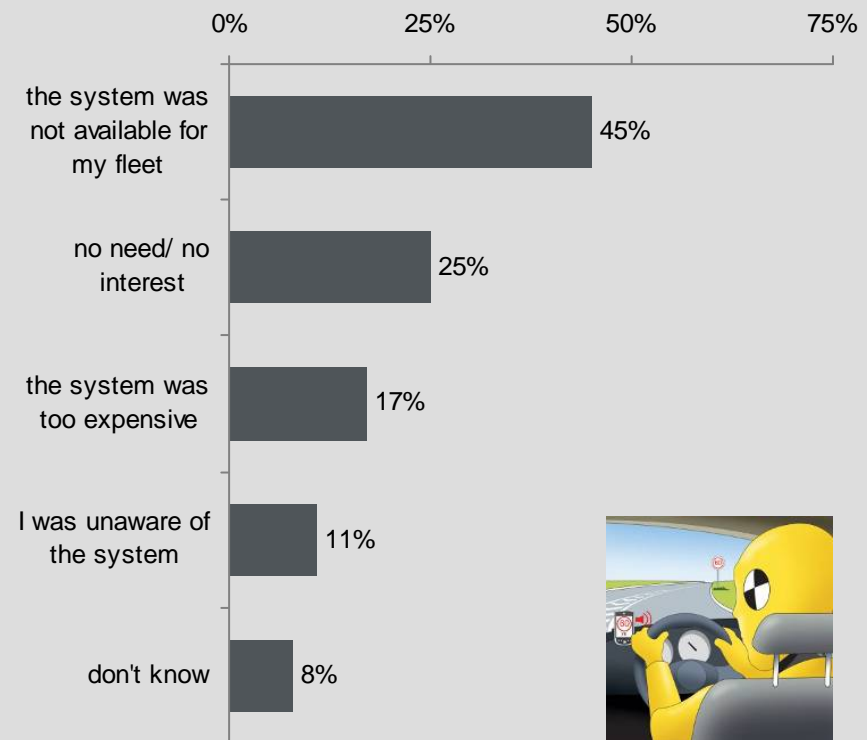
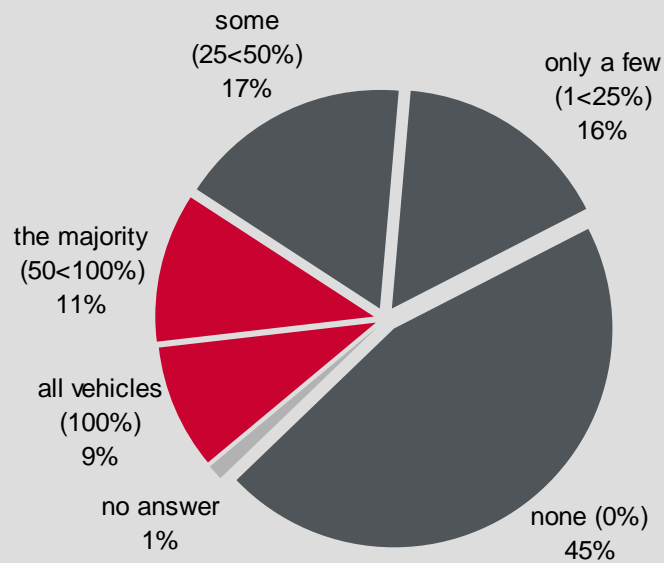


3.3 eSafety systems in fleets

3.3.4 Speed Alert

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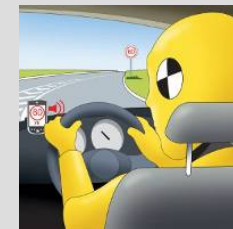
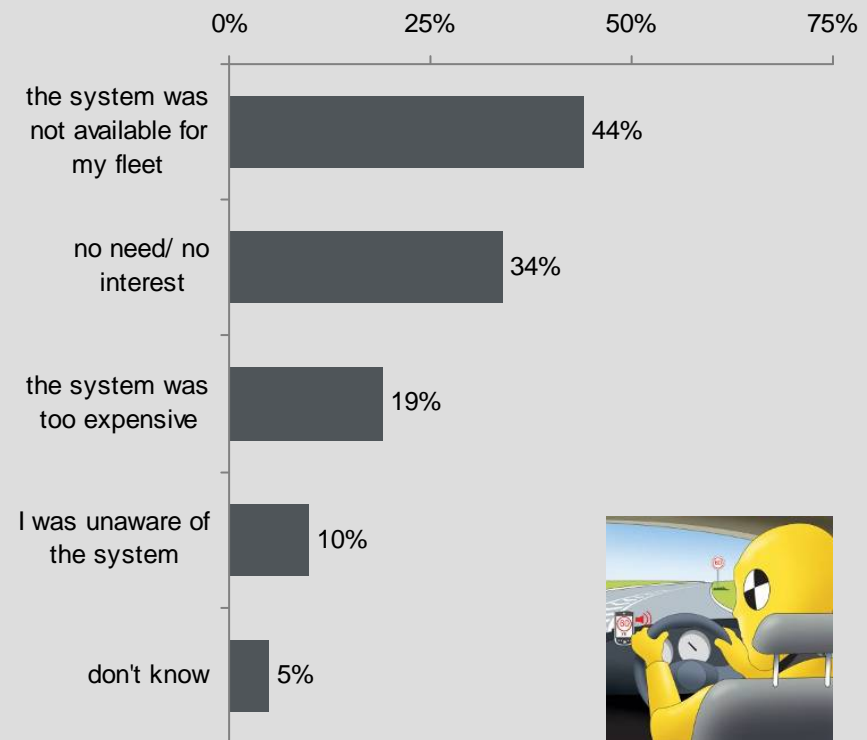
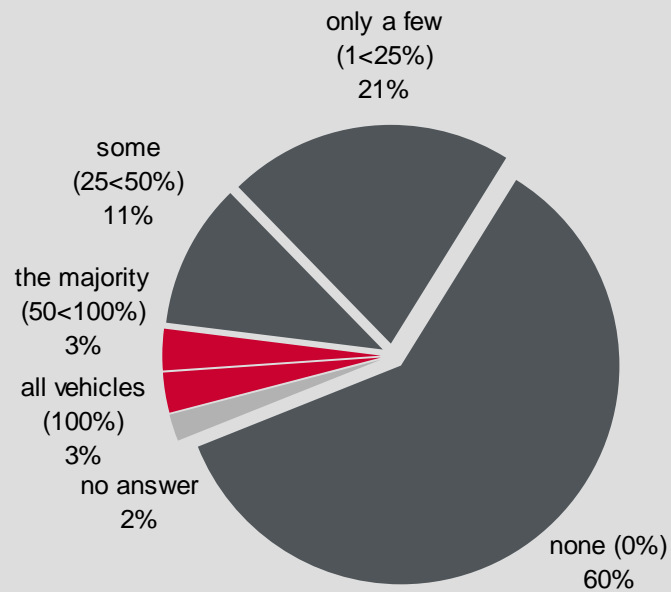


3.3 eSafety systems in fleets

3.3.4 Speed Alert

Do you have Speed Alert on your fleet?

Why is your fleet less or not equipped with Speed Alert? (multiple answers possible; filter: only respondents with "<50%")

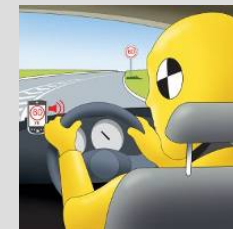
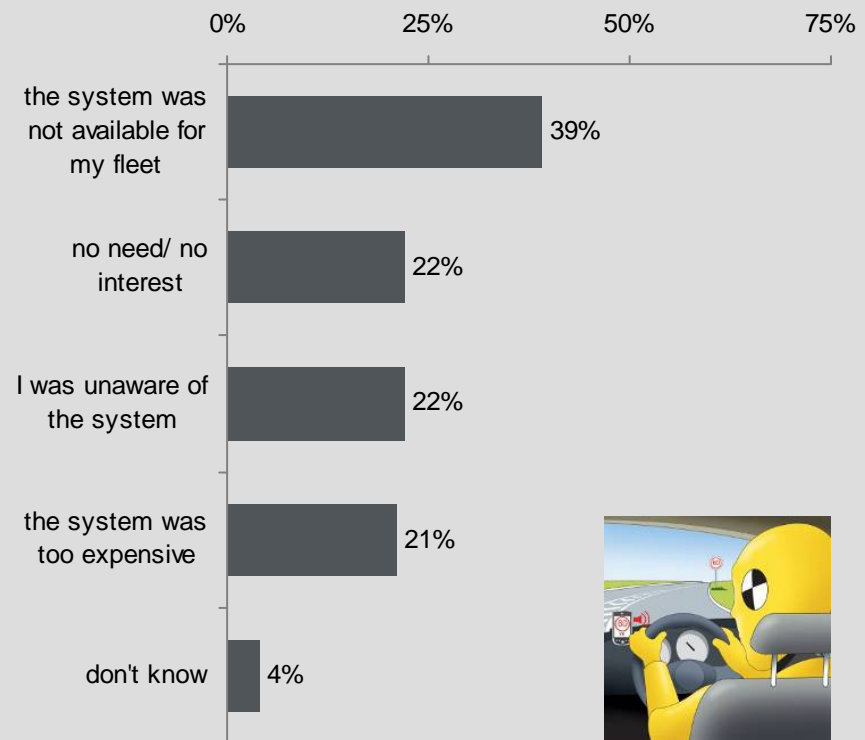
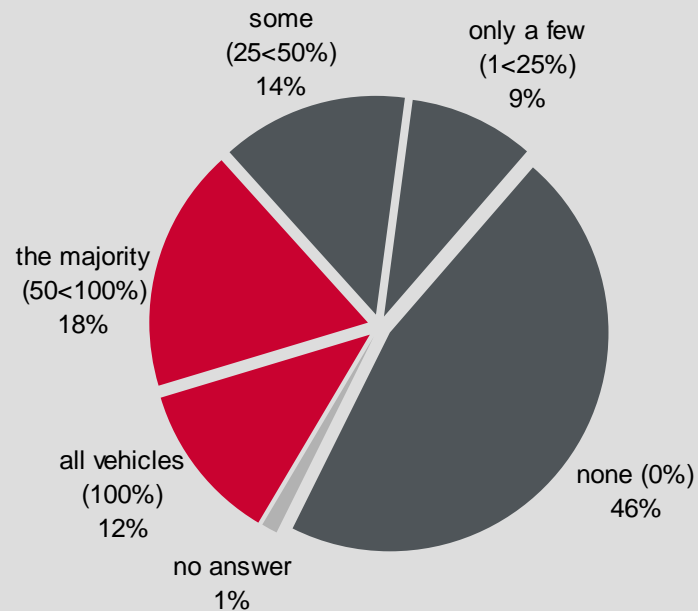


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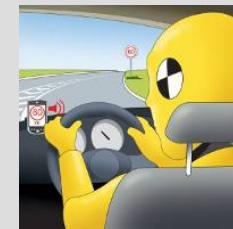
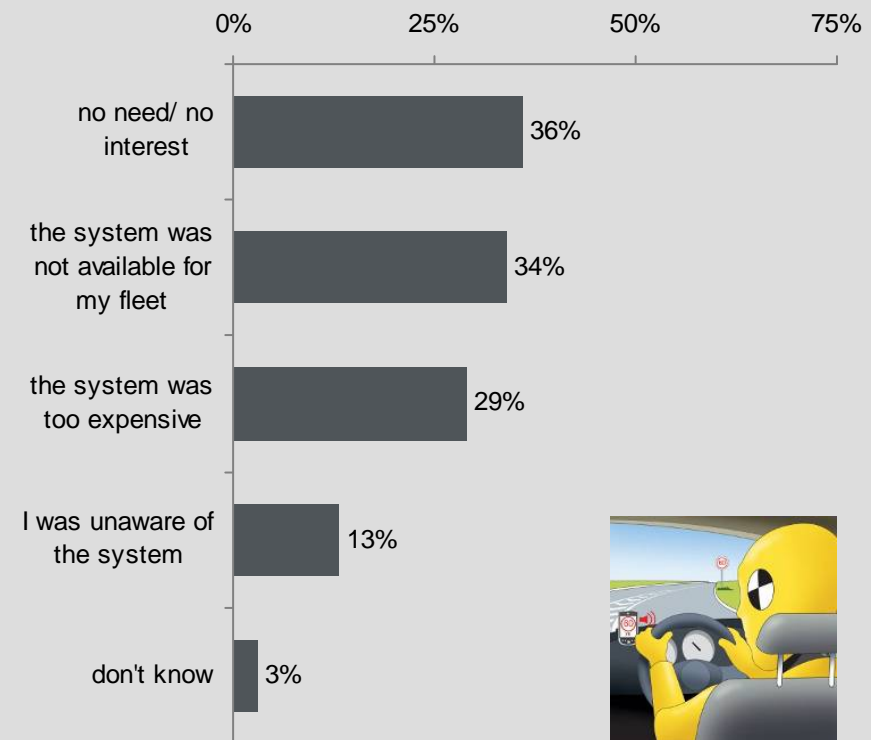
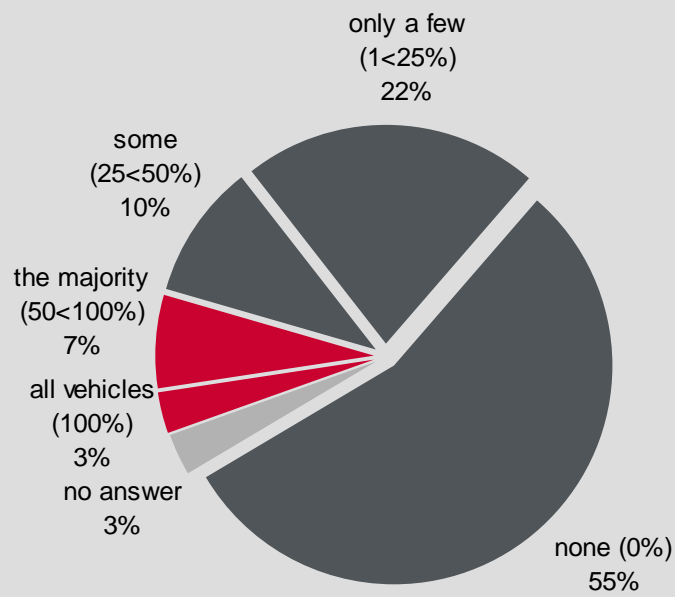


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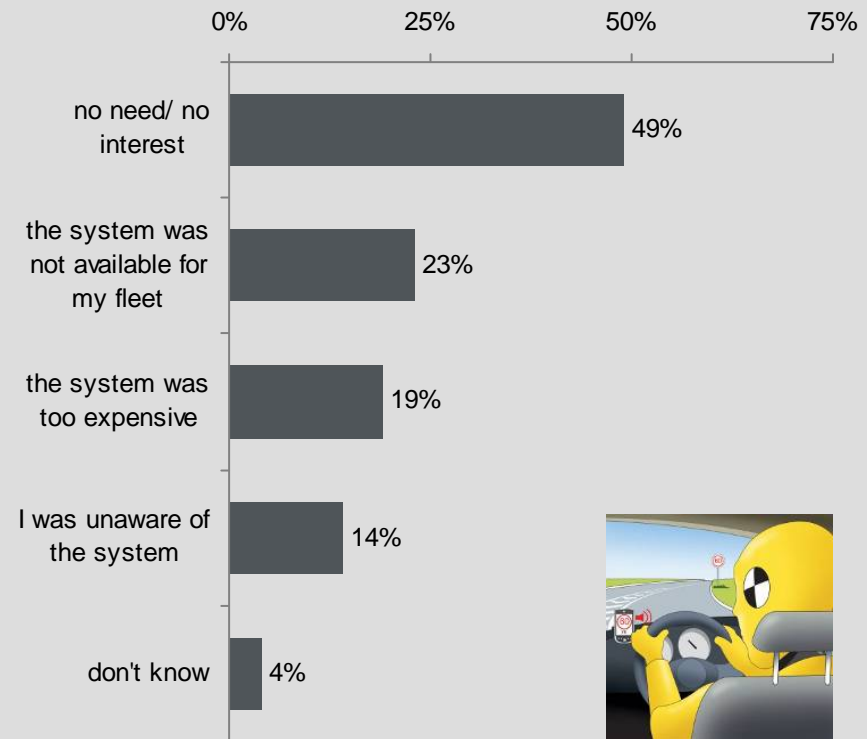
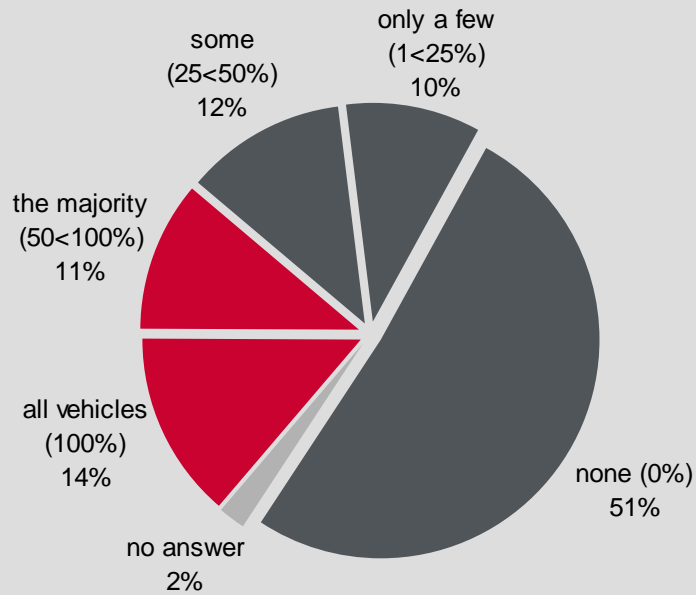


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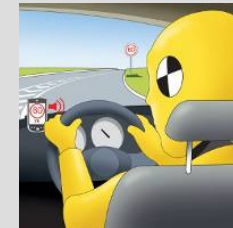
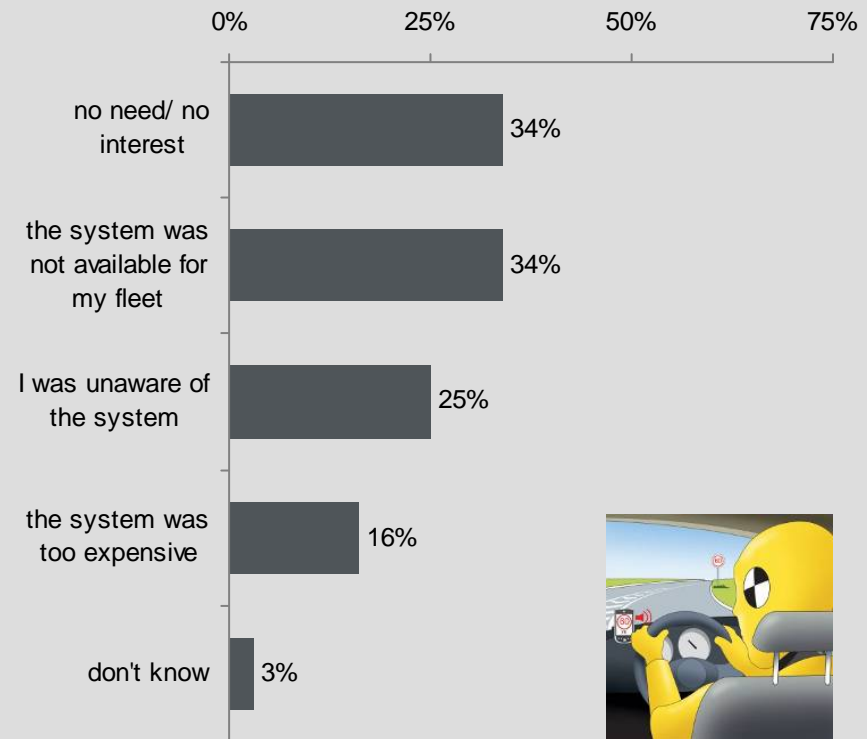
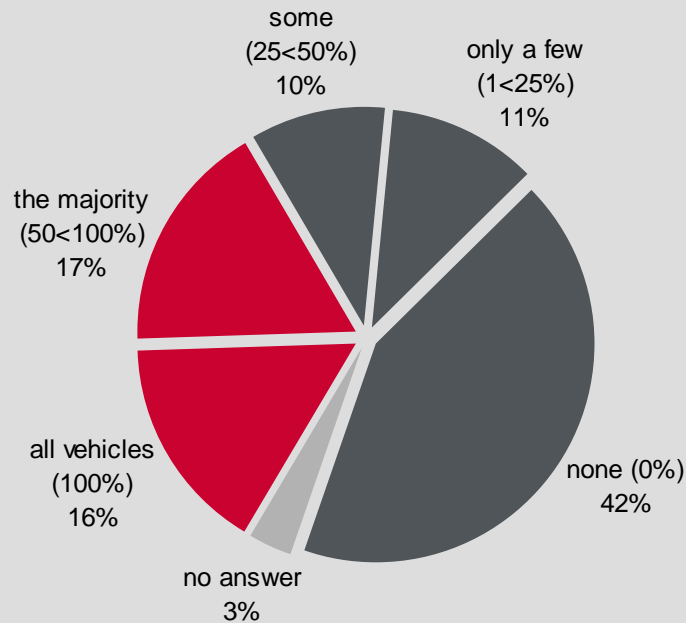


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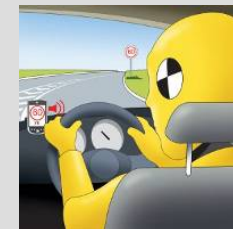
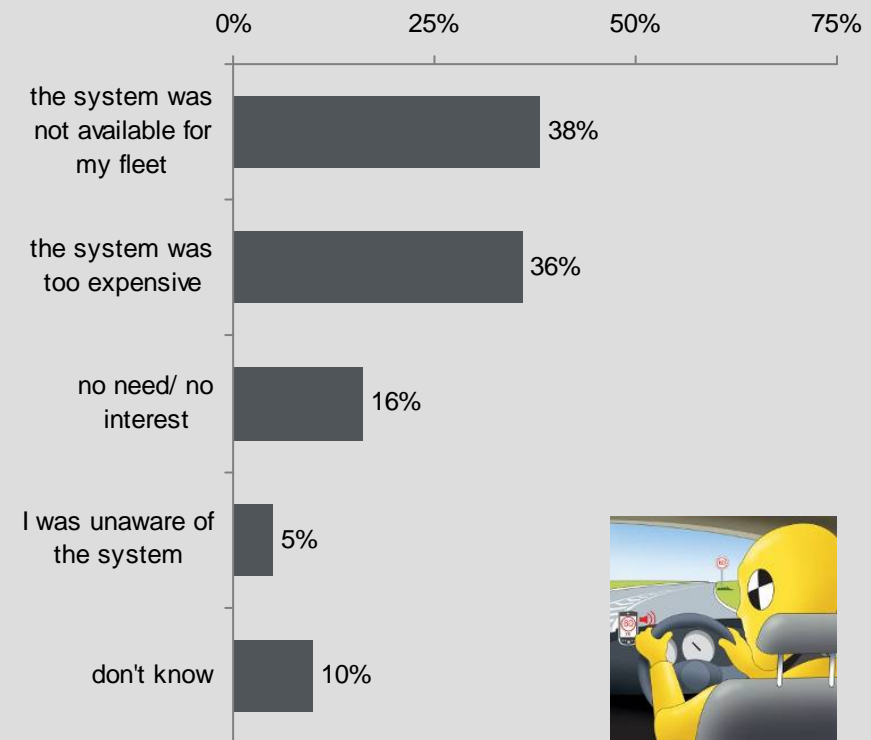
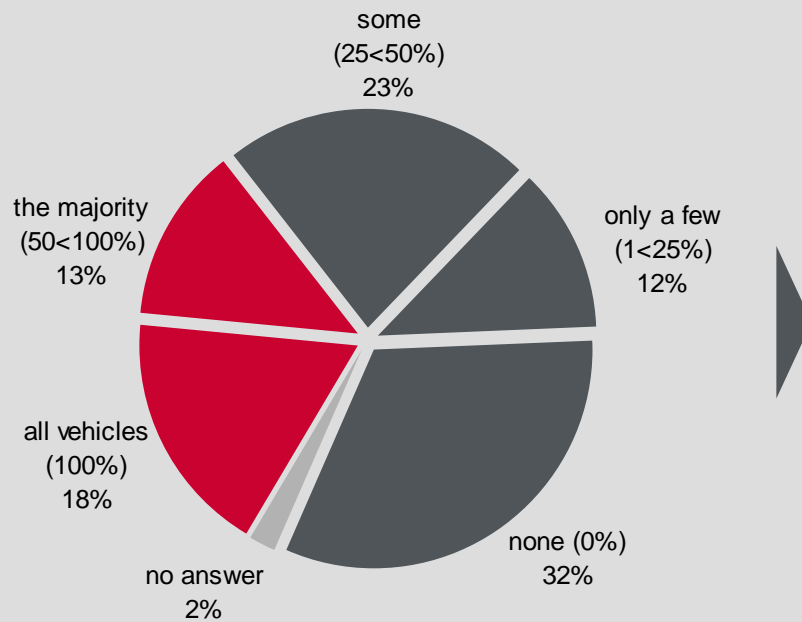
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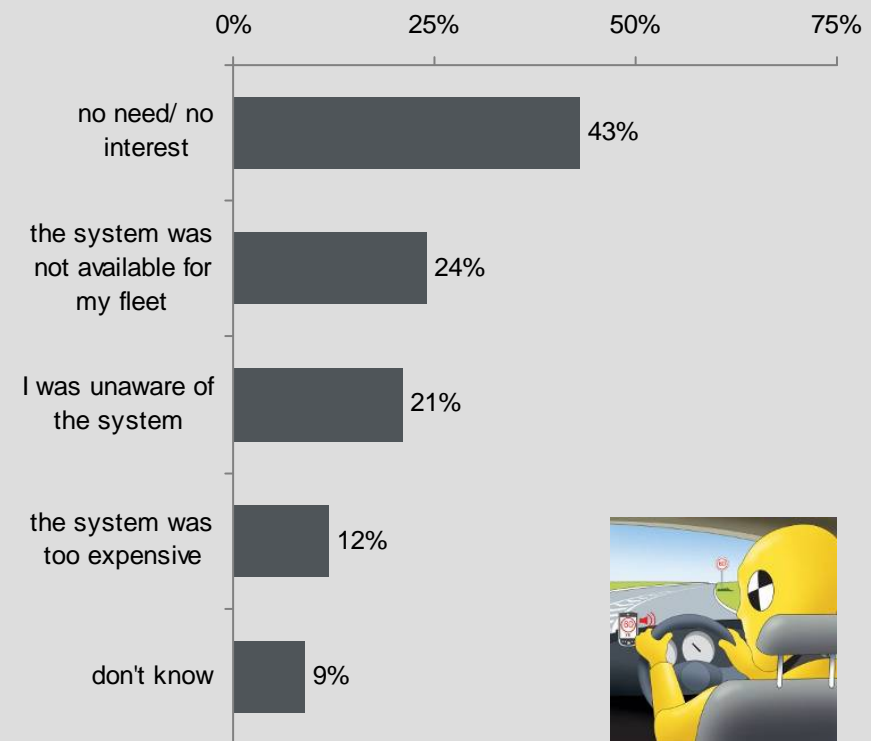
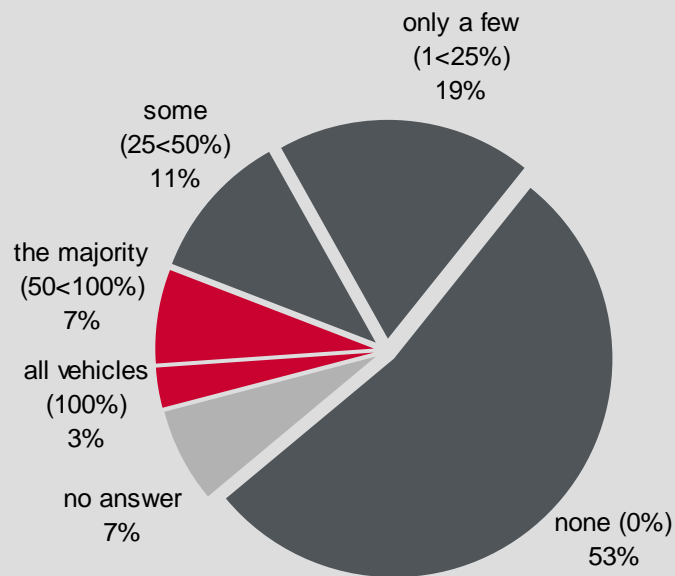
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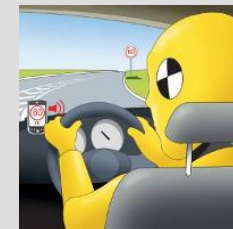
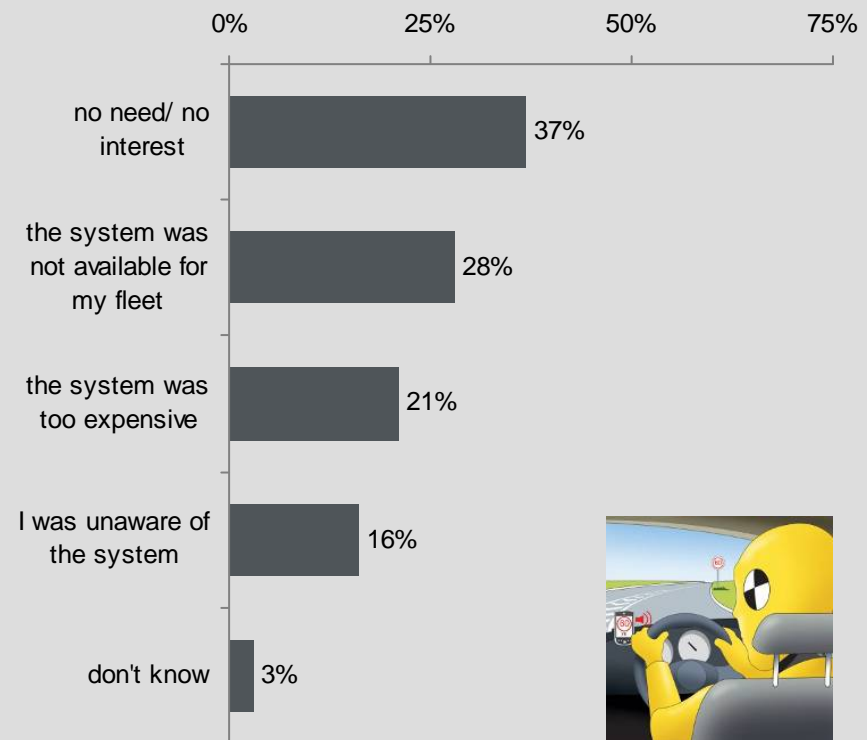
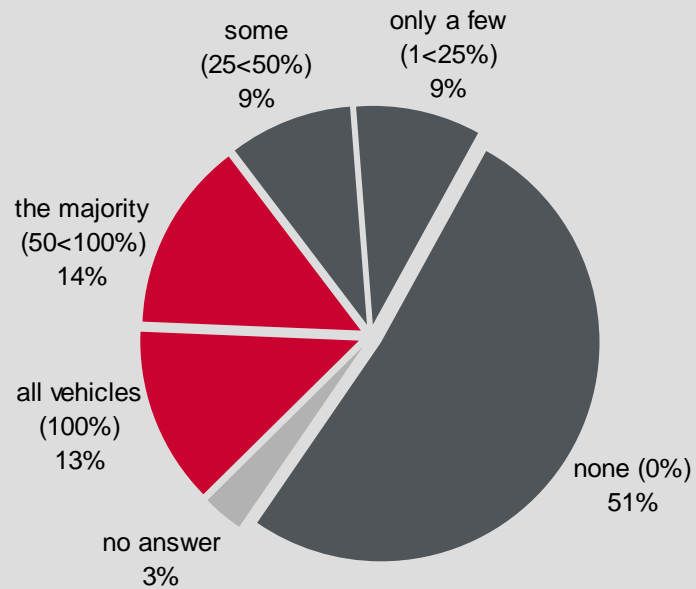
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3.3.4 Speed Alert



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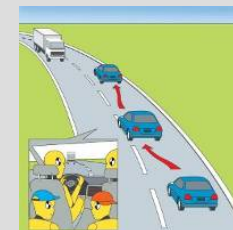
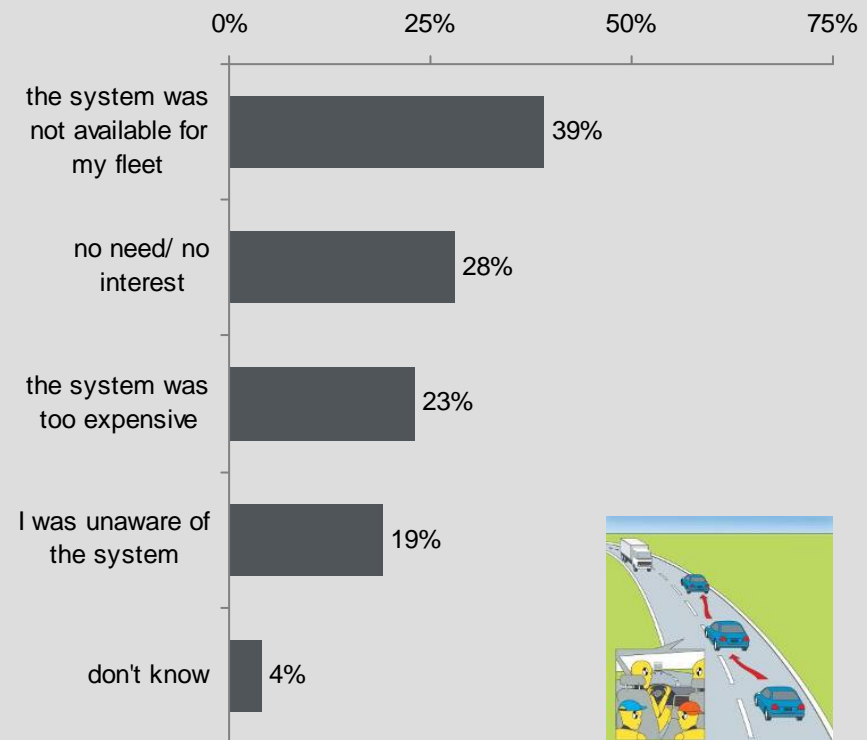
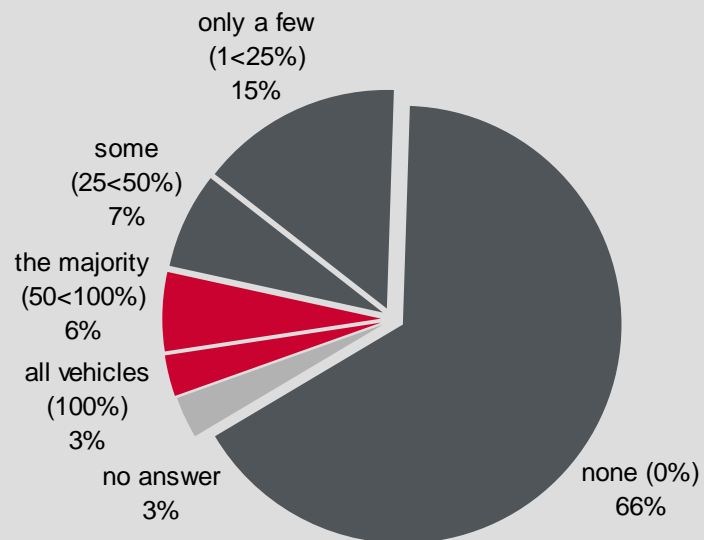
1. Background and methodological design
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3.3 eSafety systems in fleets

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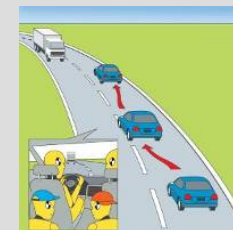
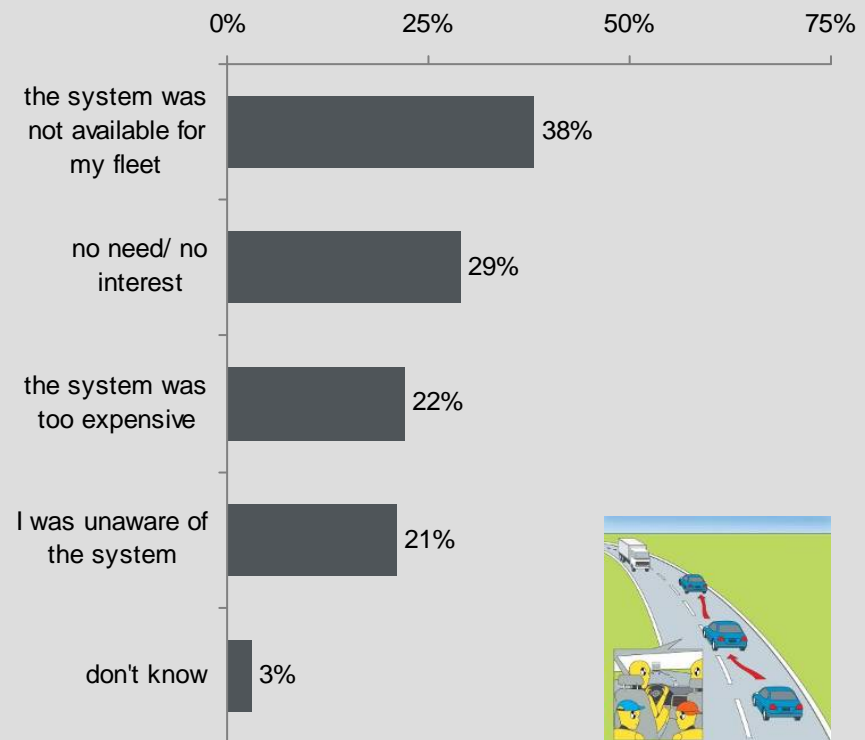
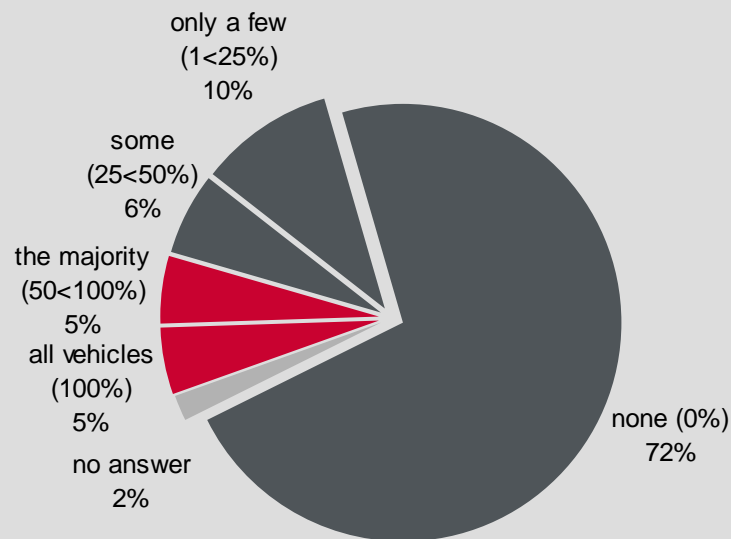


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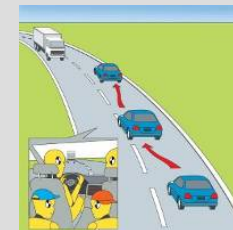
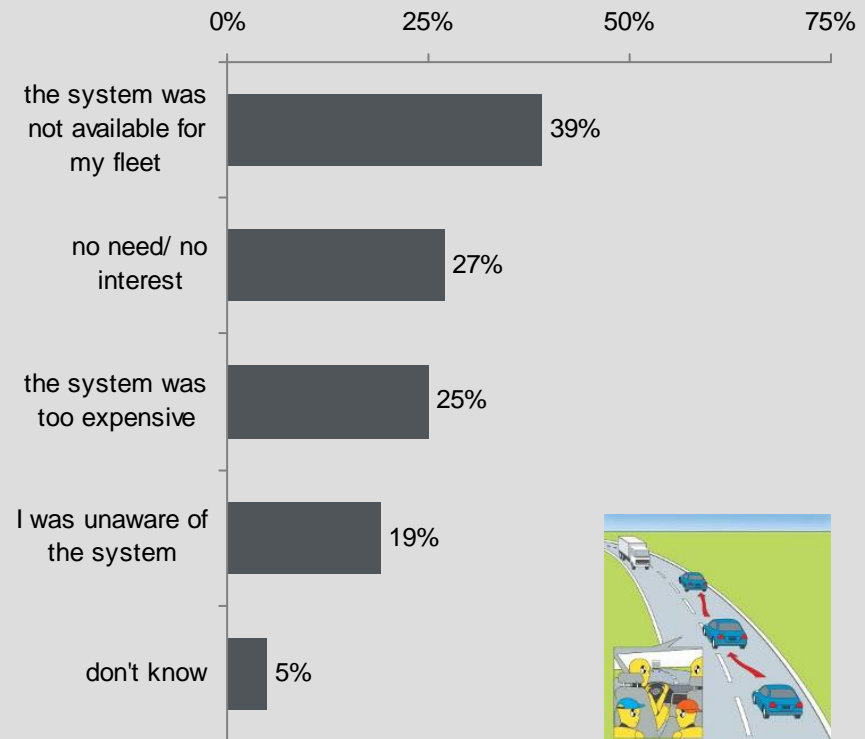
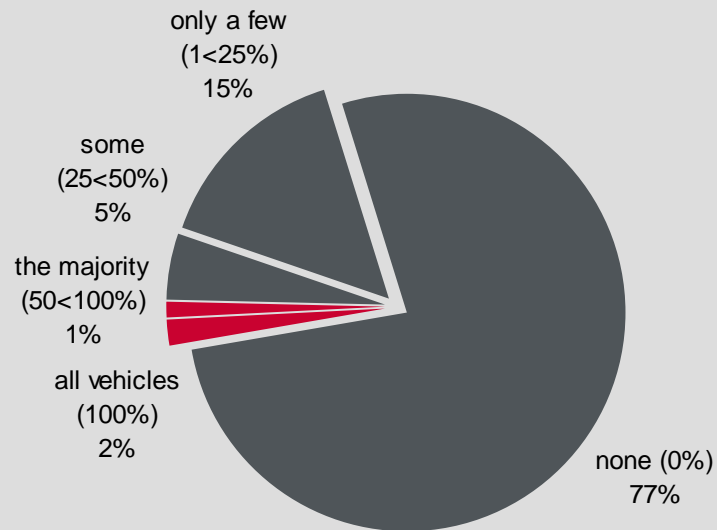


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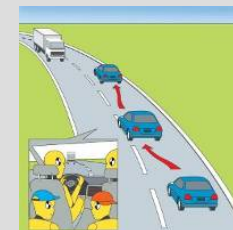
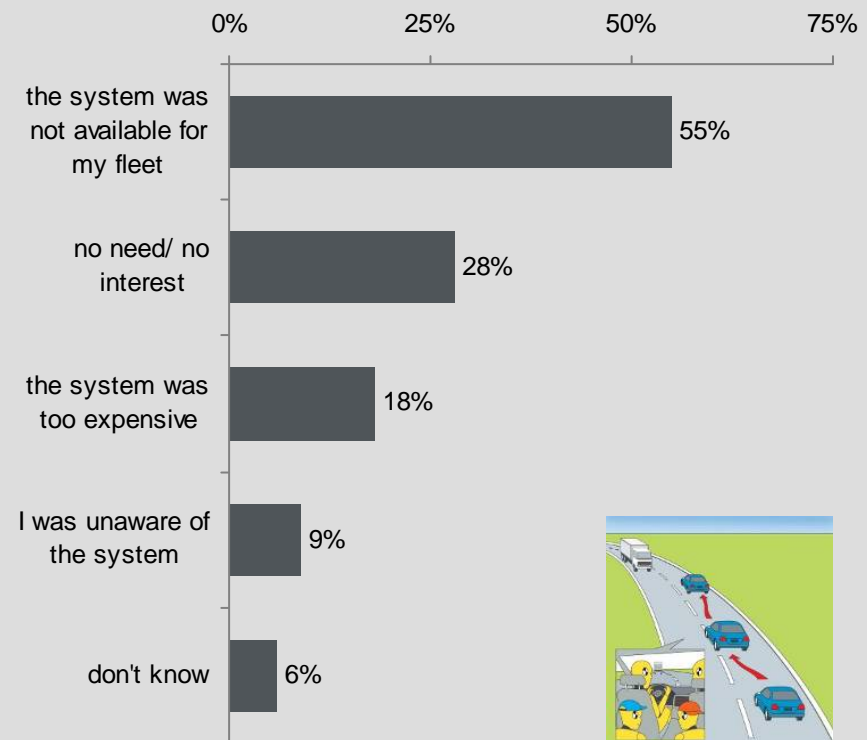
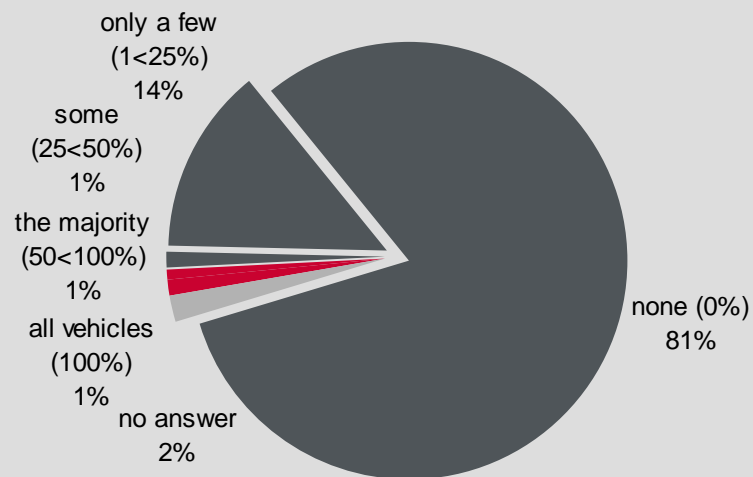


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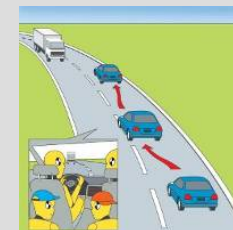
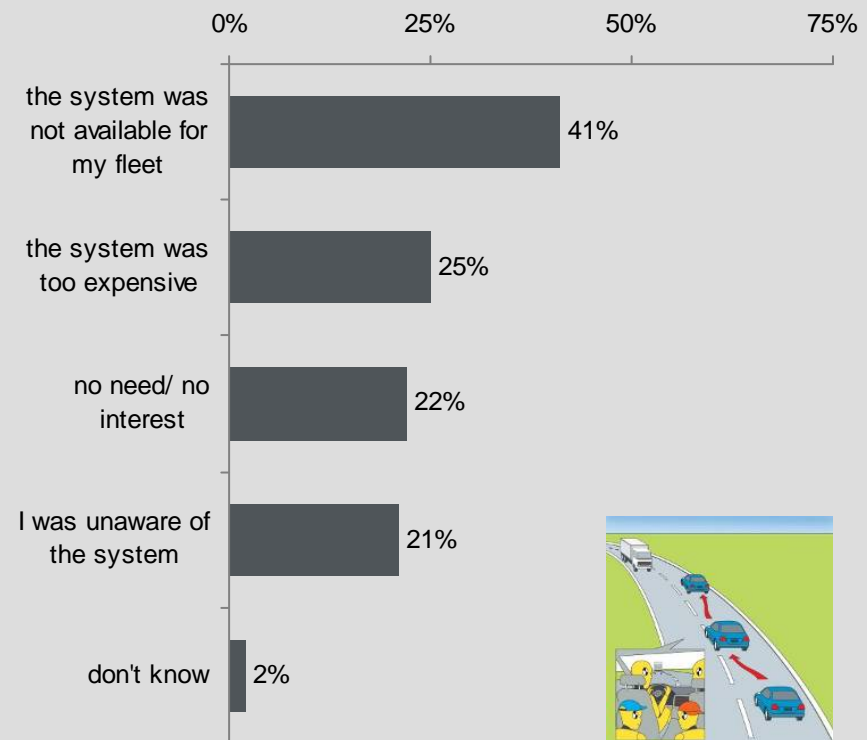
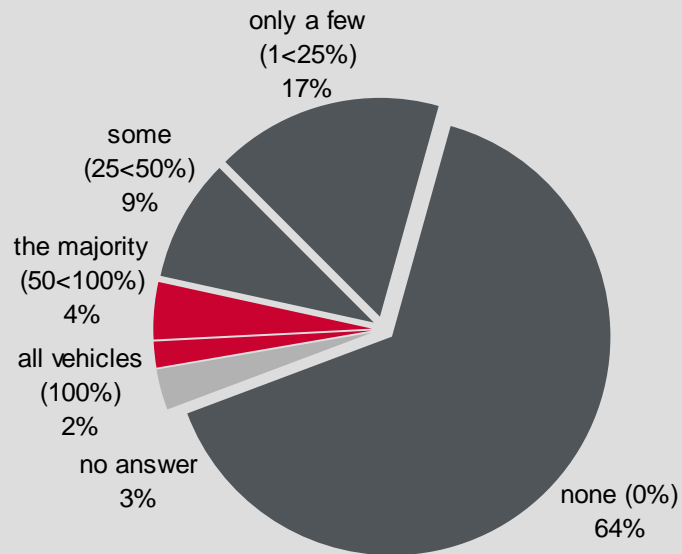


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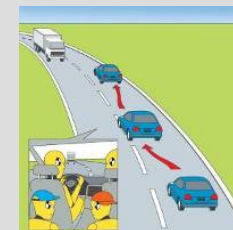
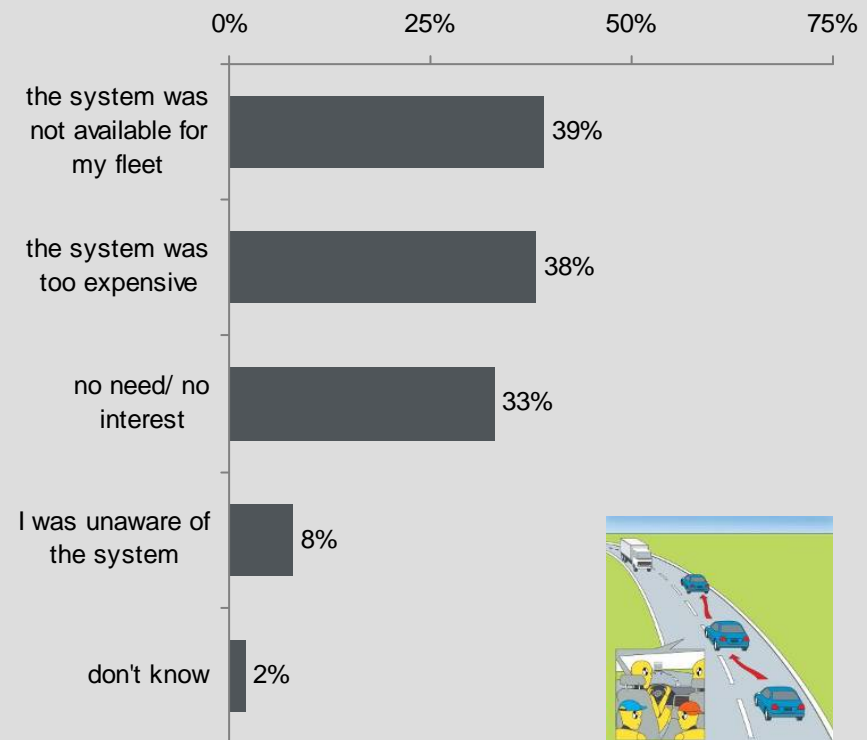
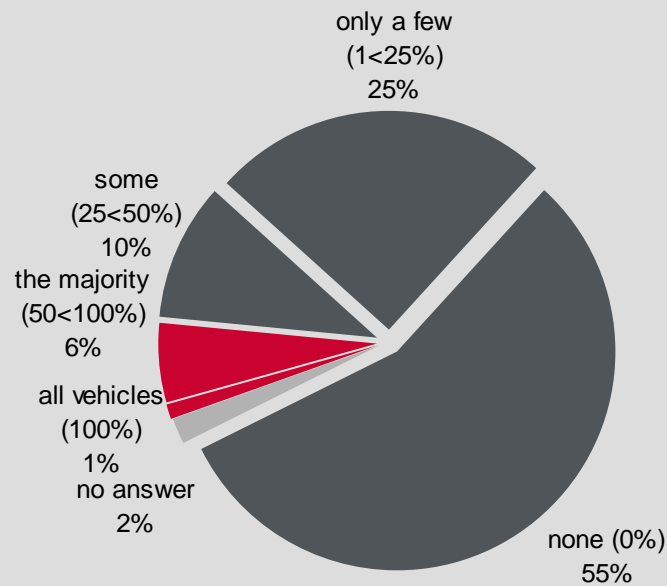
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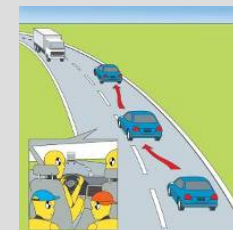
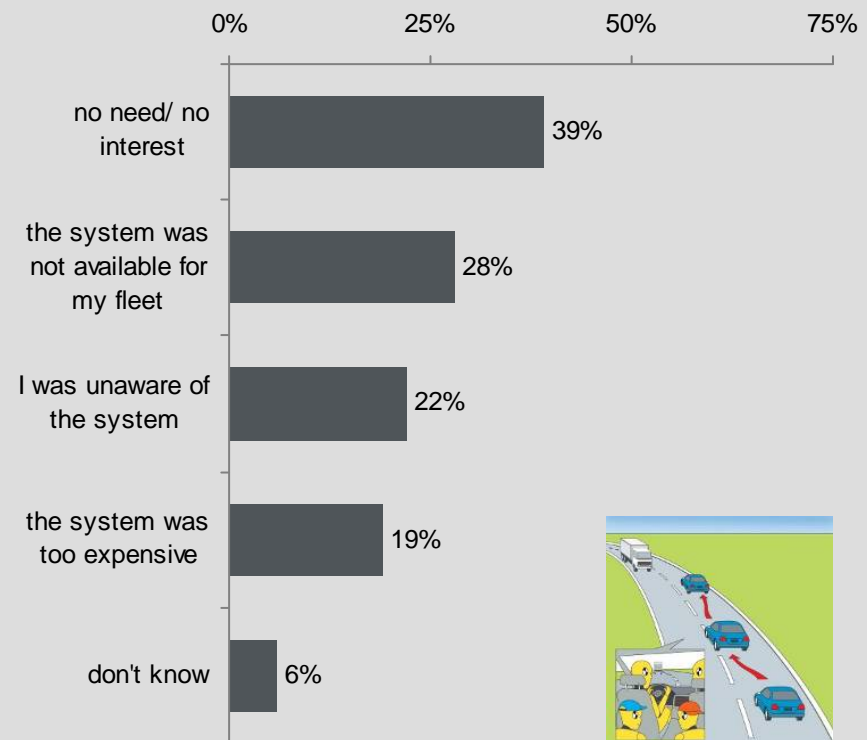
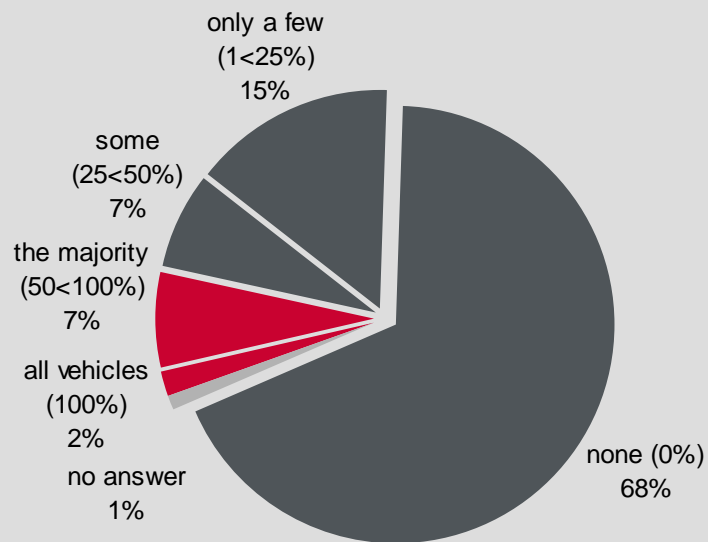


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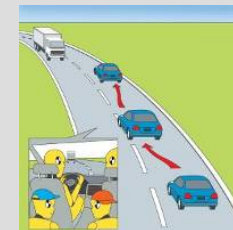
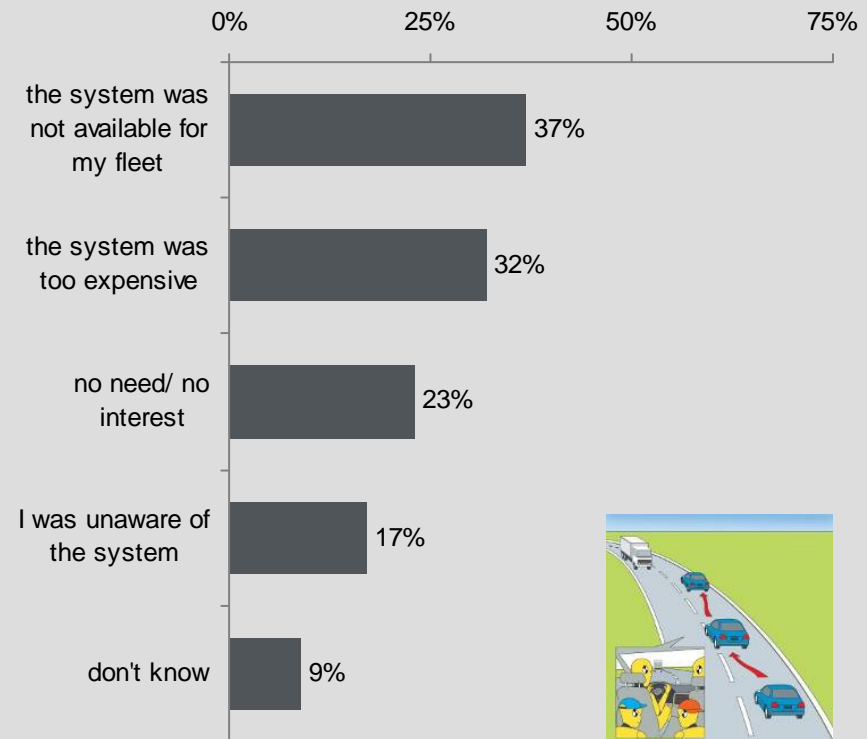
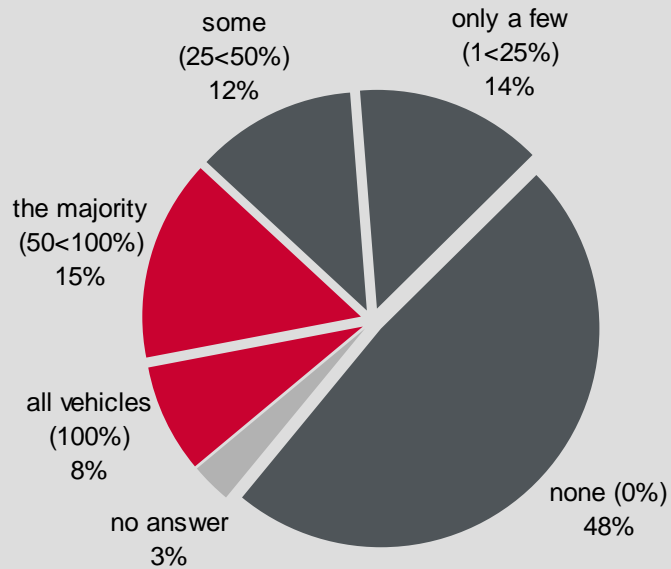


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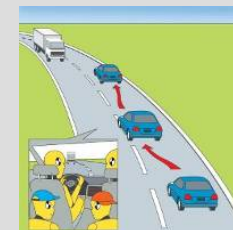
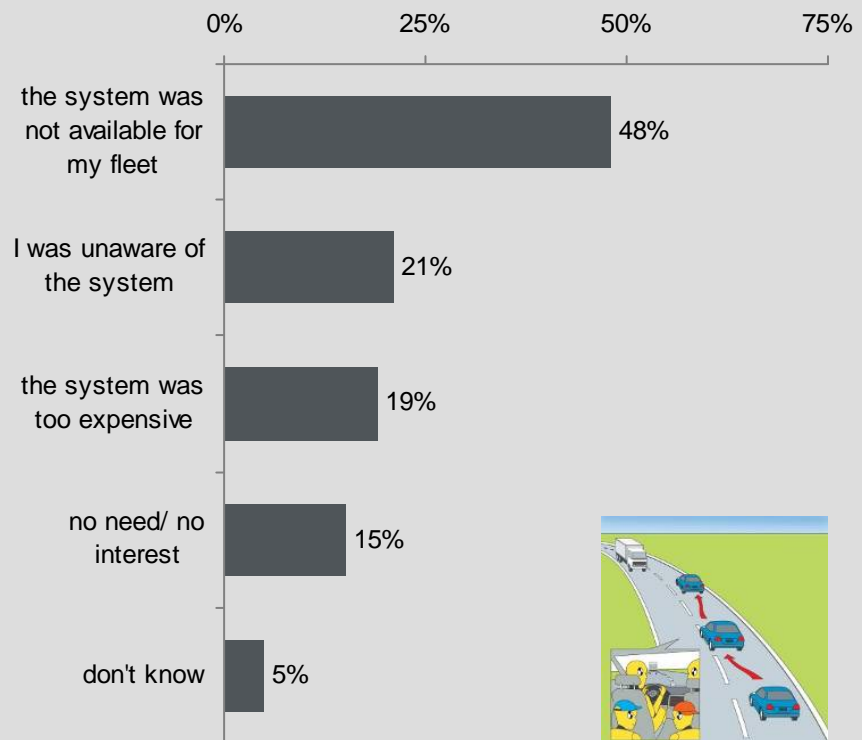
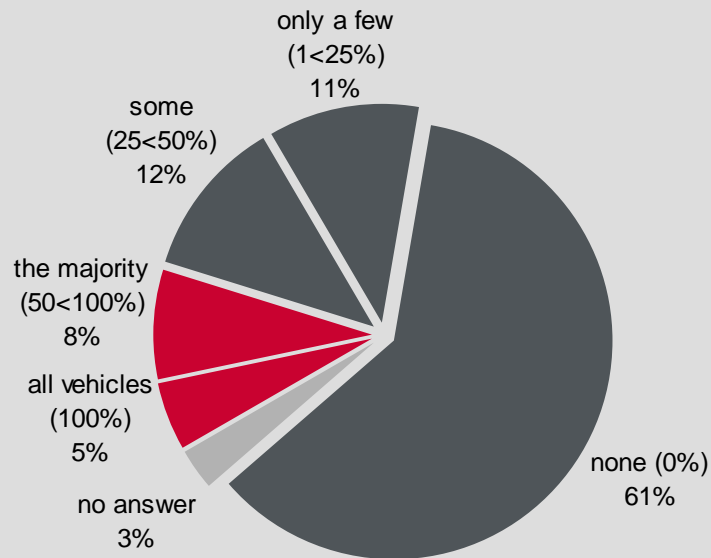
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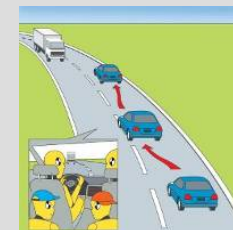
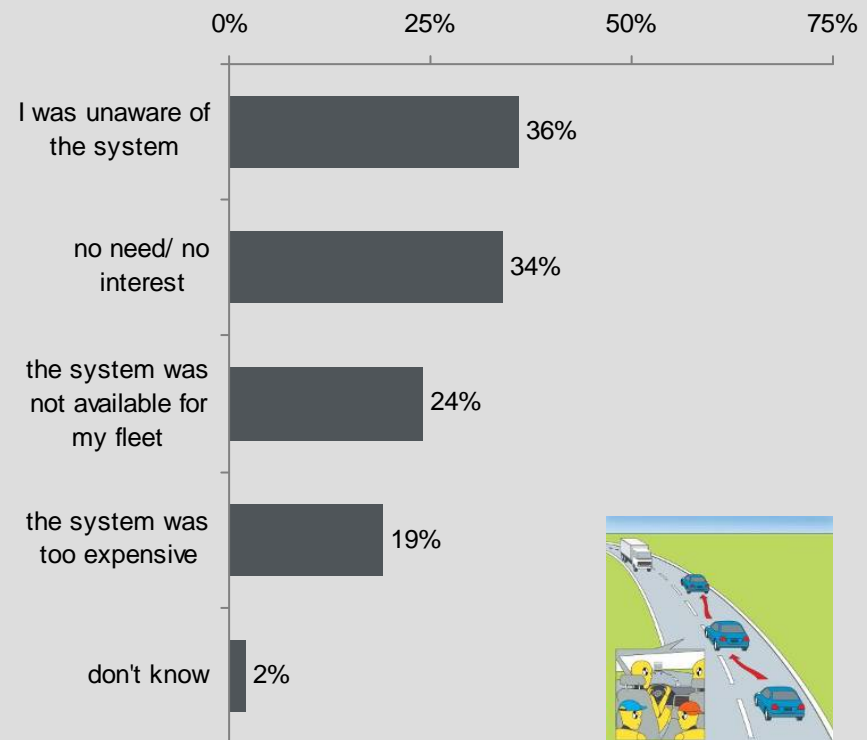
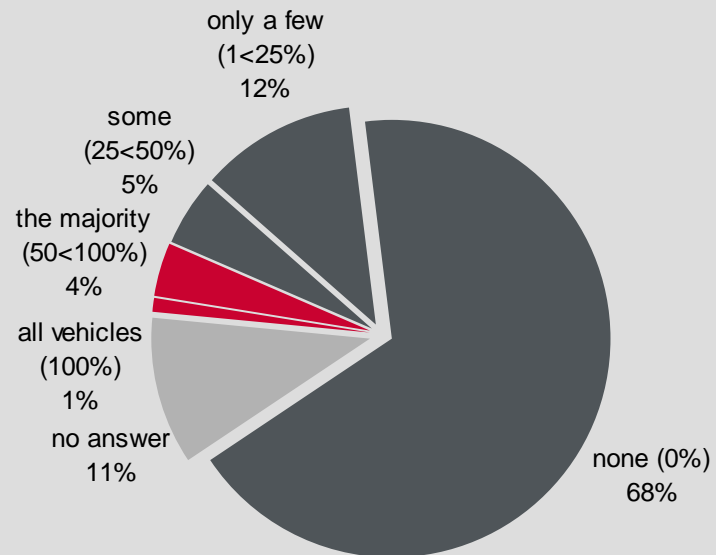
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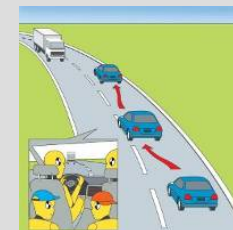
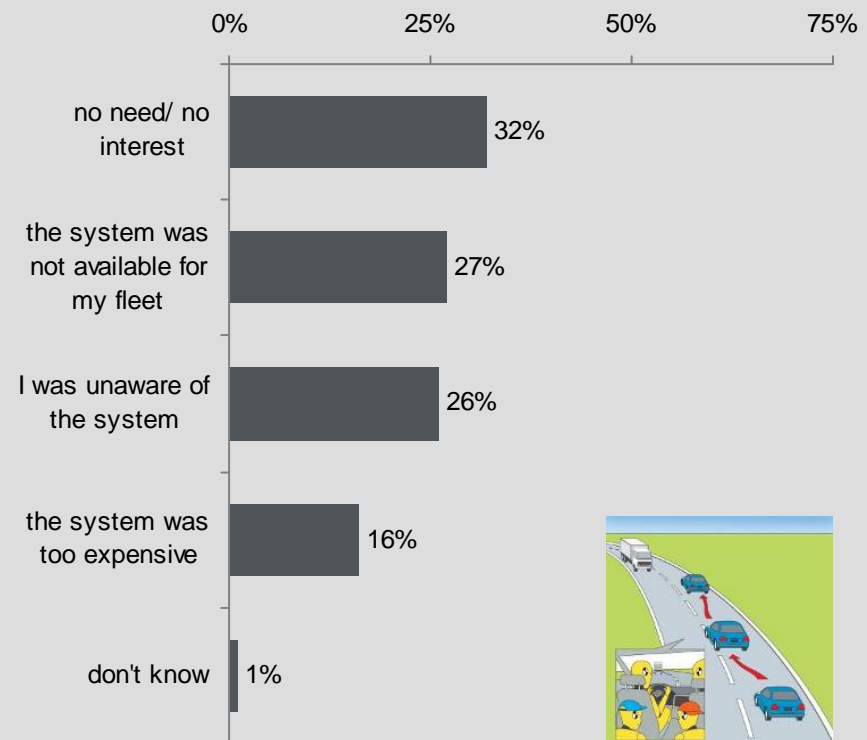
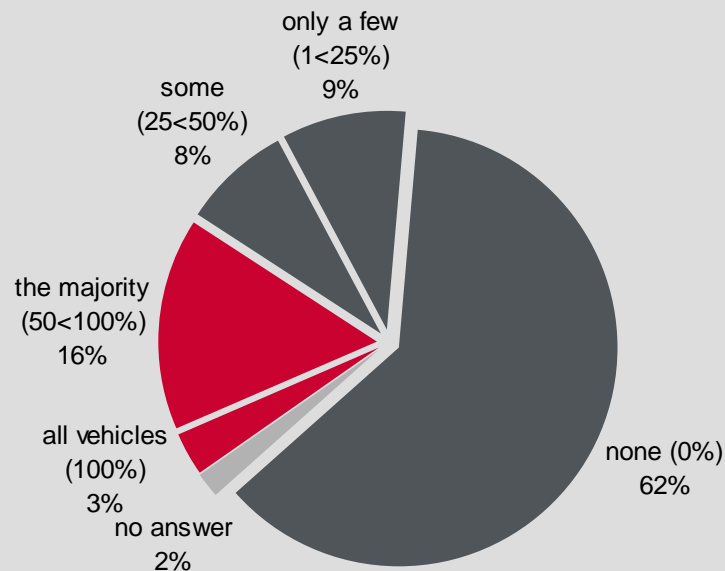
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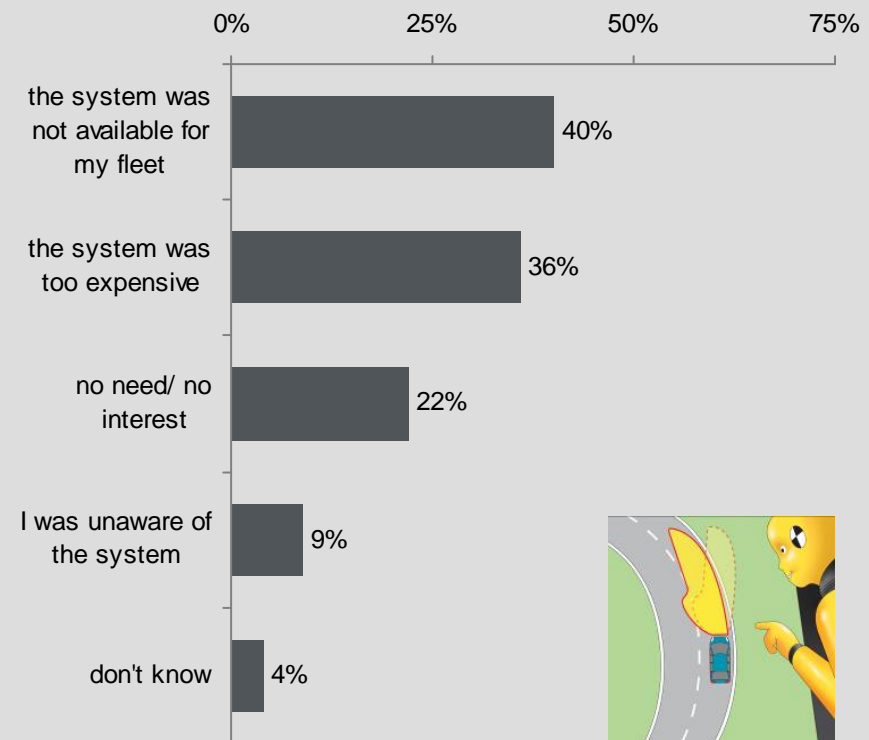
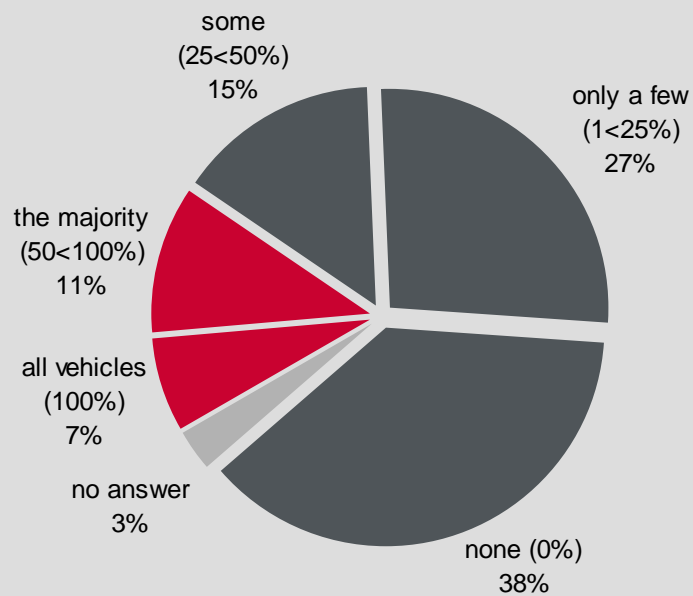
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3.3 eSafety systems in fleets

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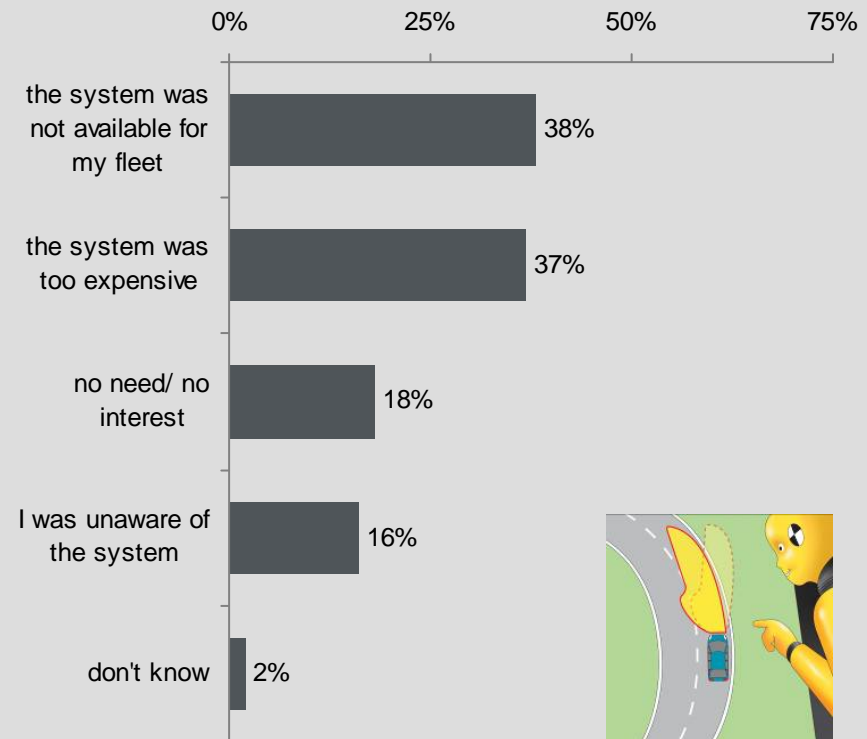
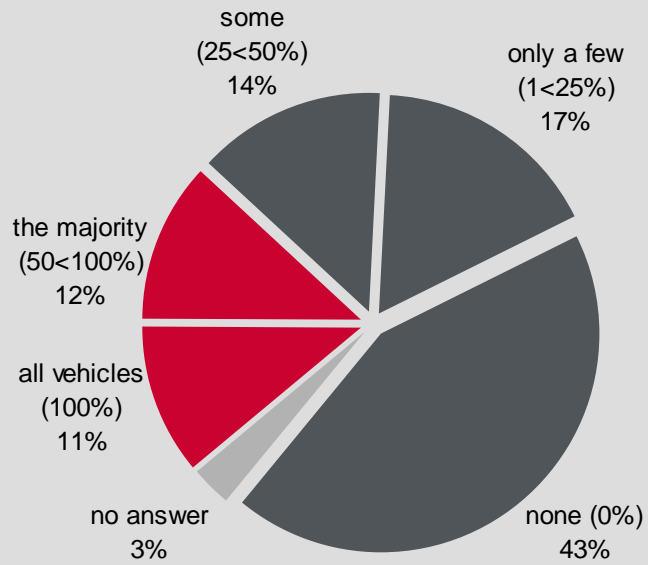


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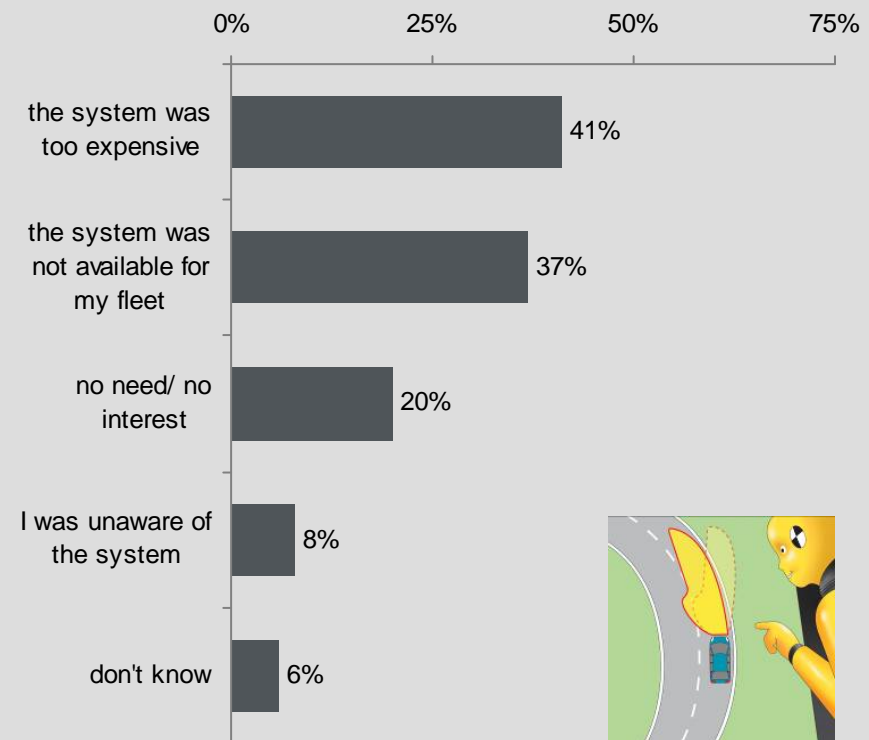
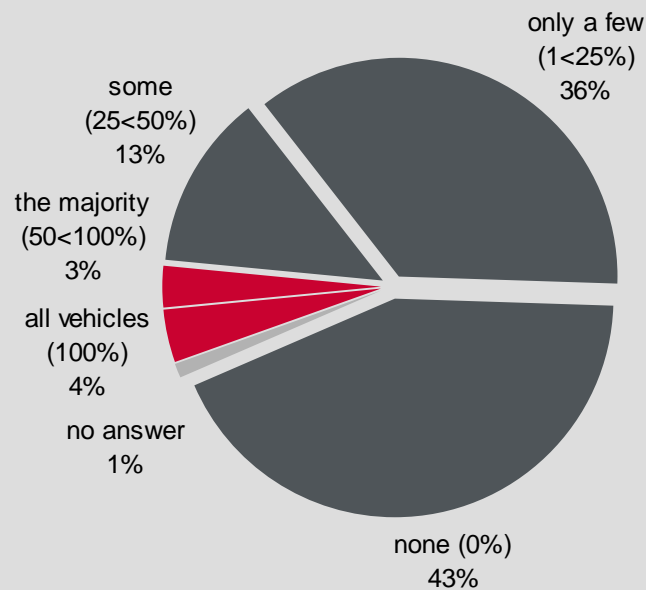
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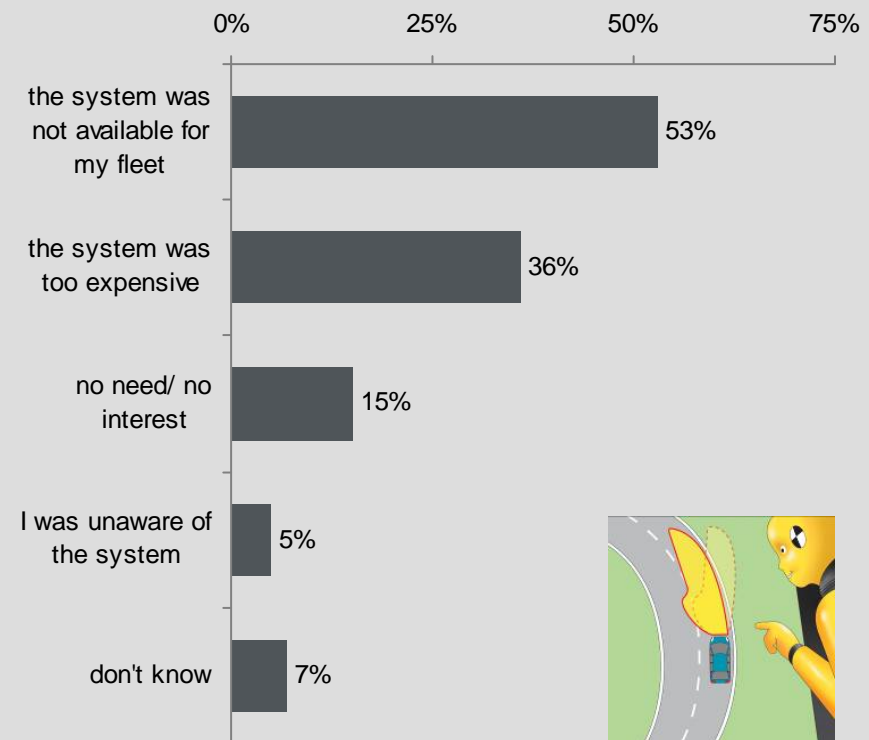
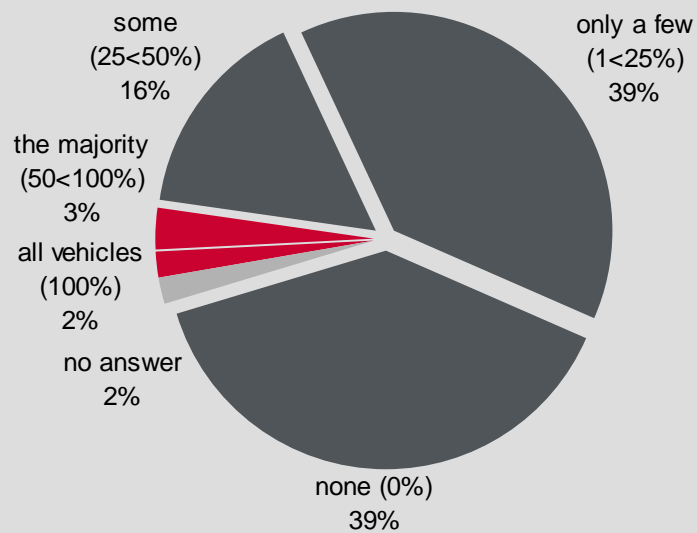


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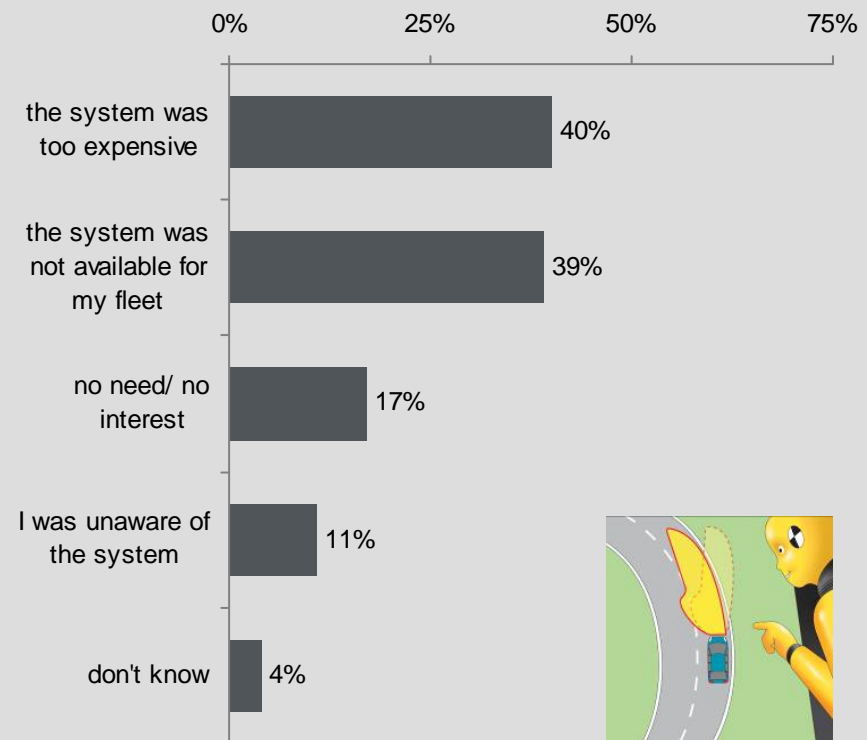
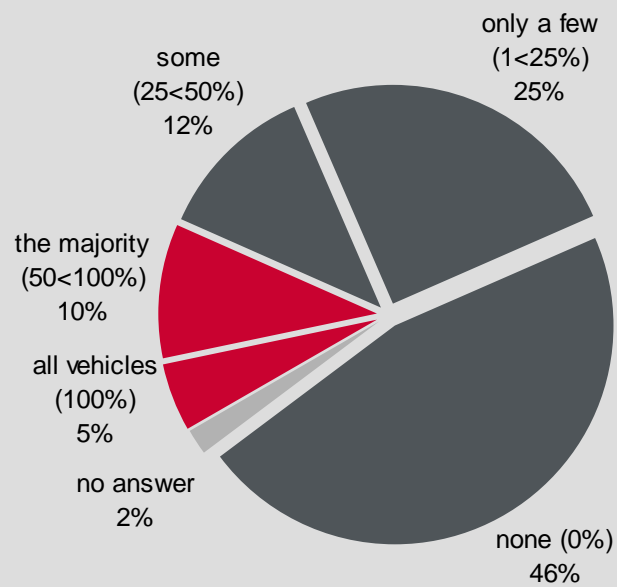


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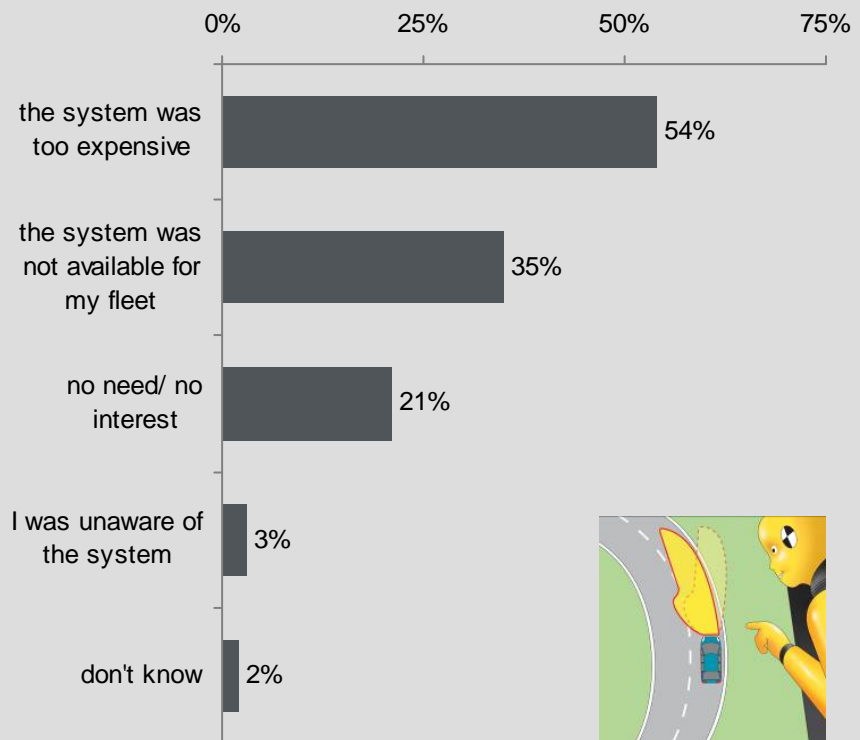
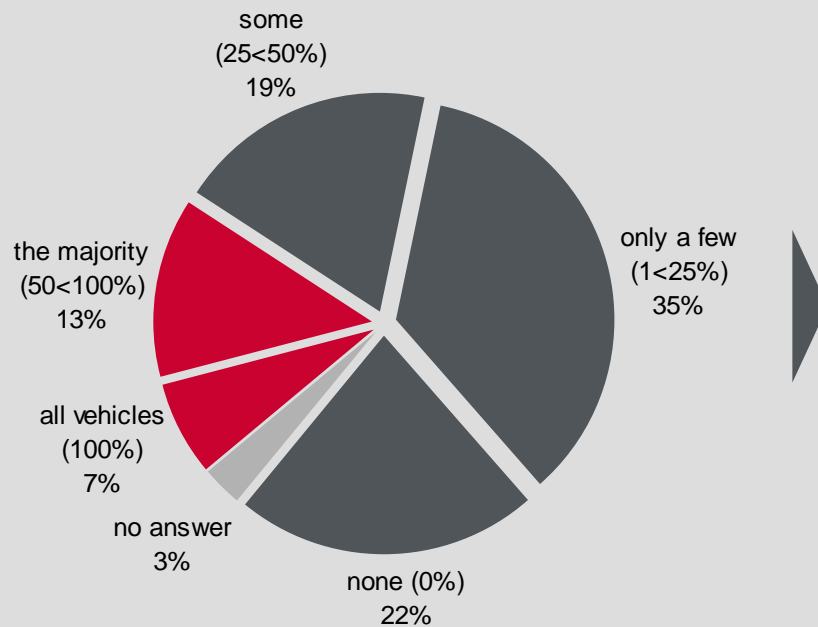
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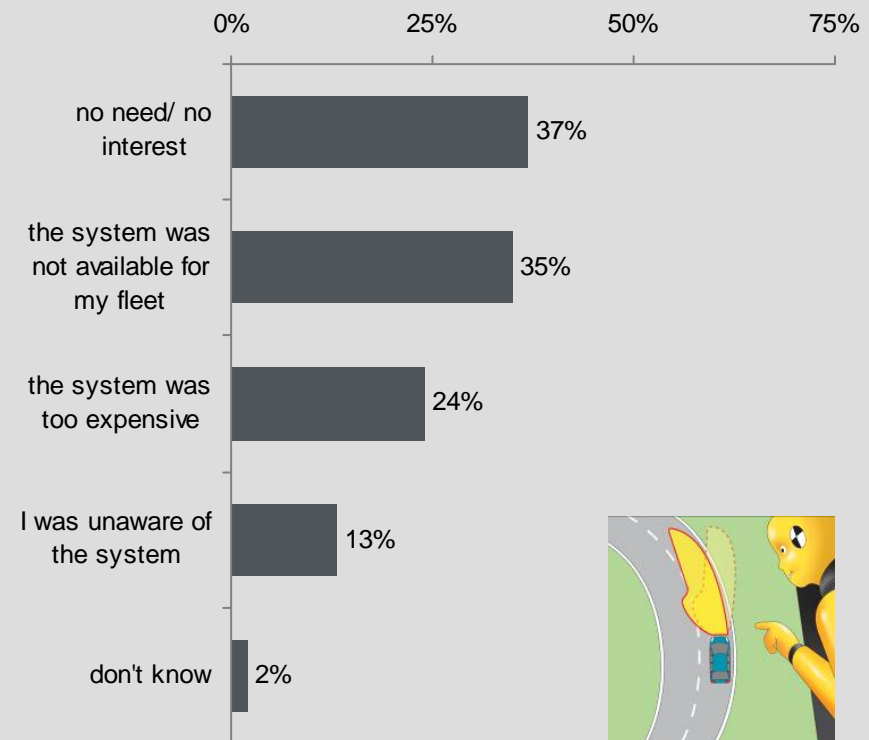
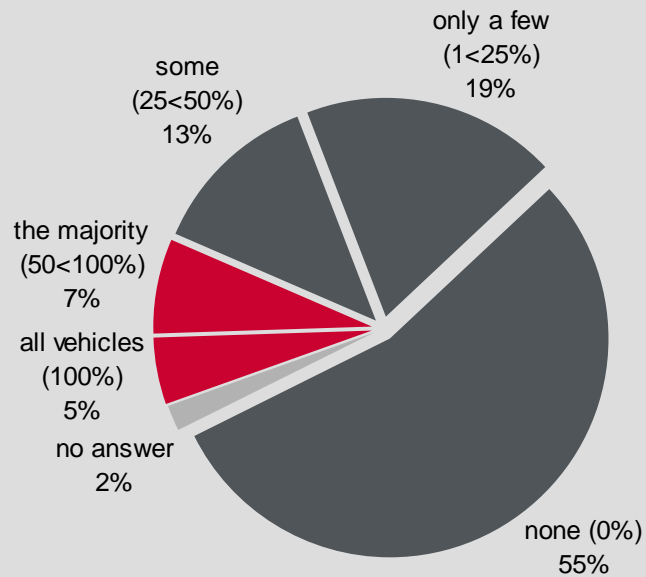


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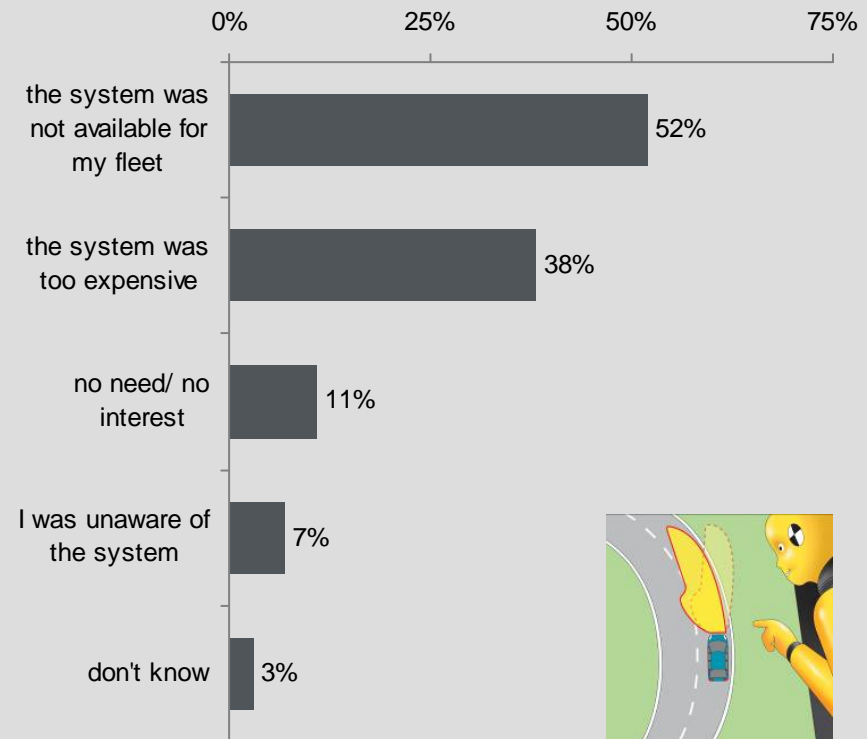
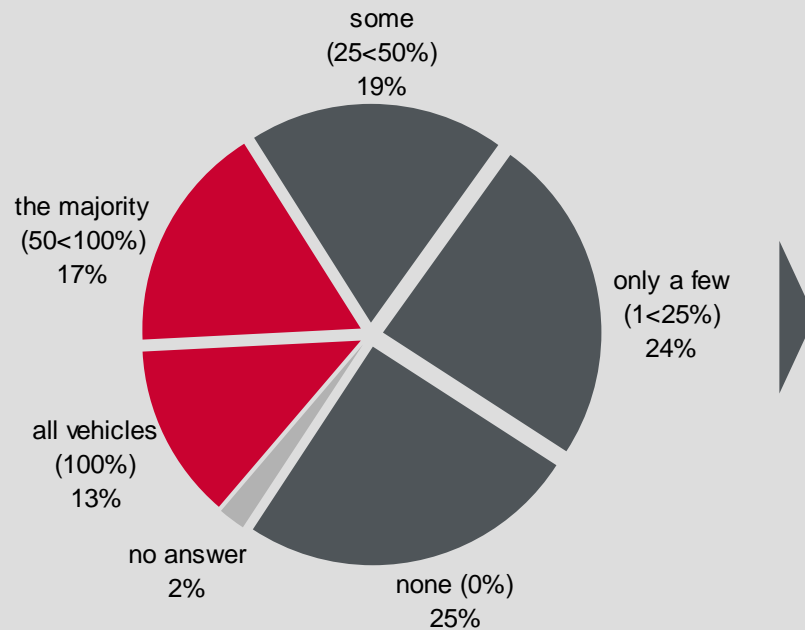


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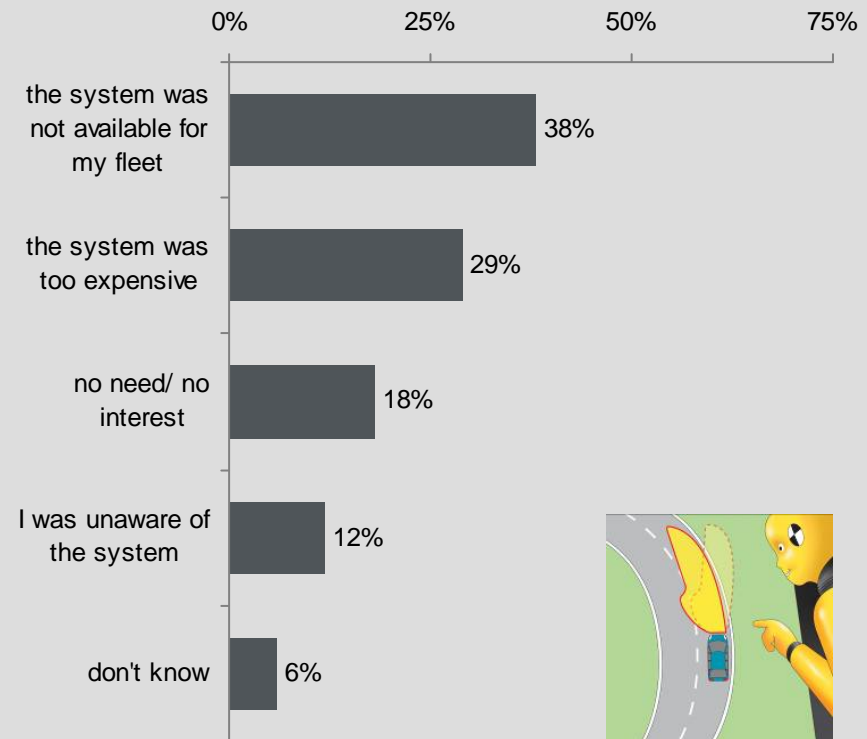
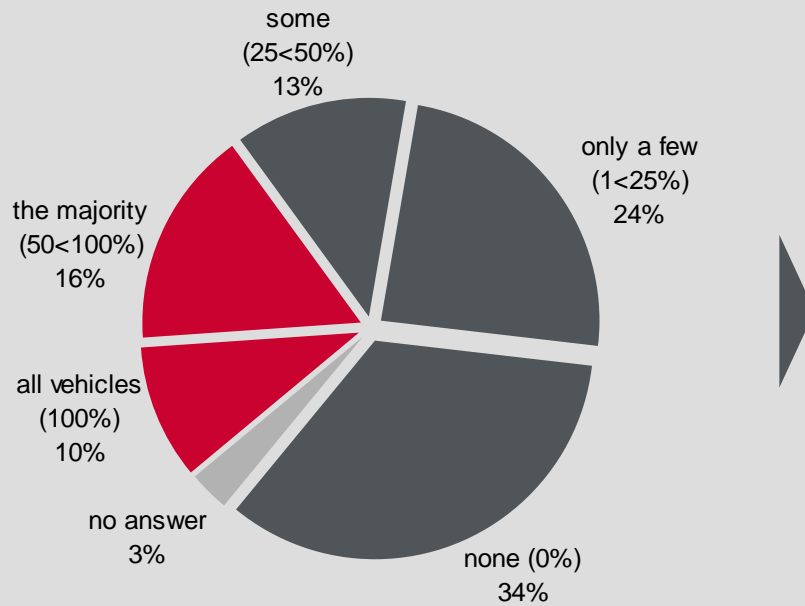
3.3 eSafety systems in fleets

3.3.6 Adaptive Headlights



Do you have Adaptive Headlights on your fleet?

Why is your fleet less or not equipped with Adaptive Headlights? (multiple answers possible; filter: only respondents with "<50%")



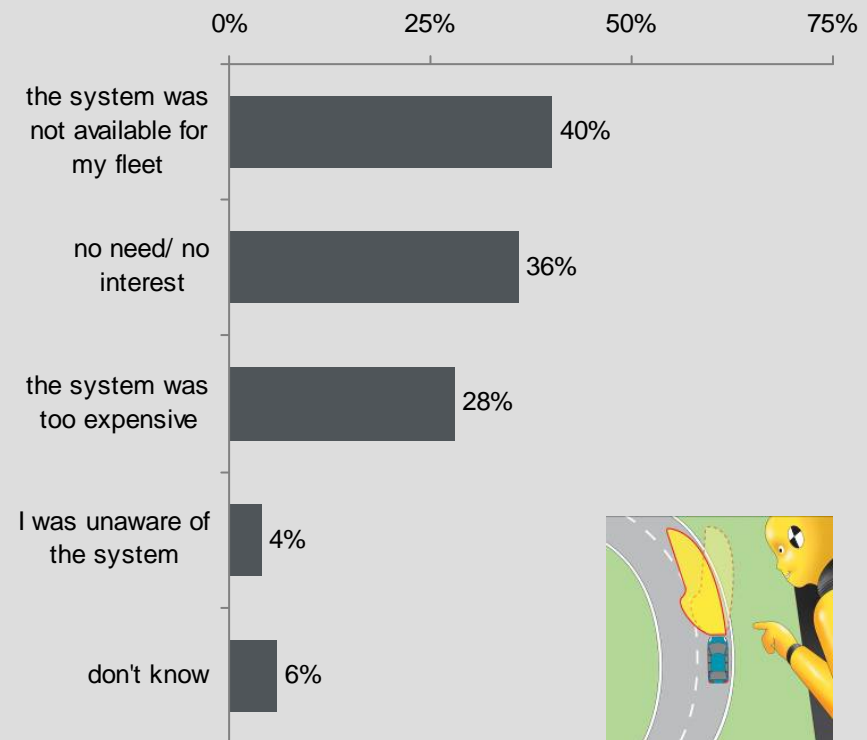
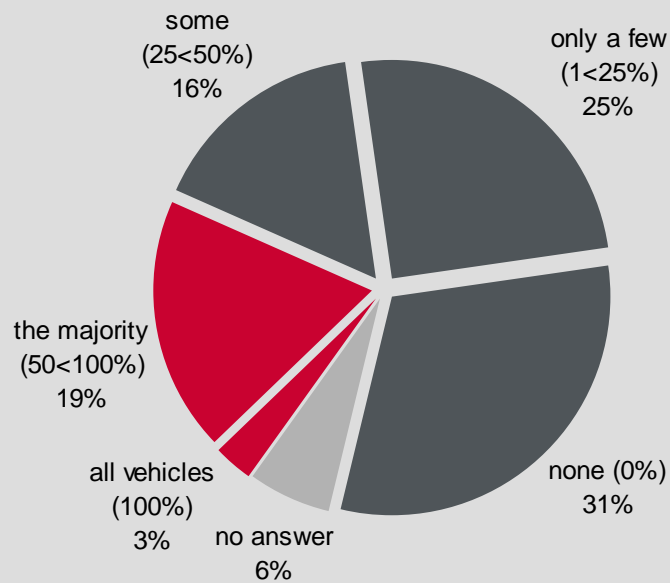
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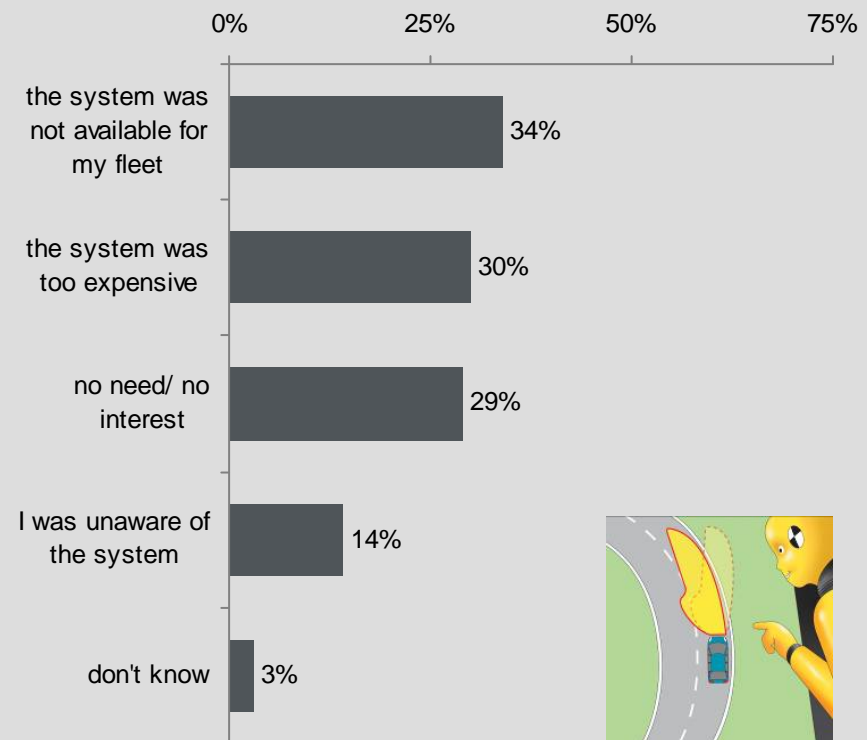
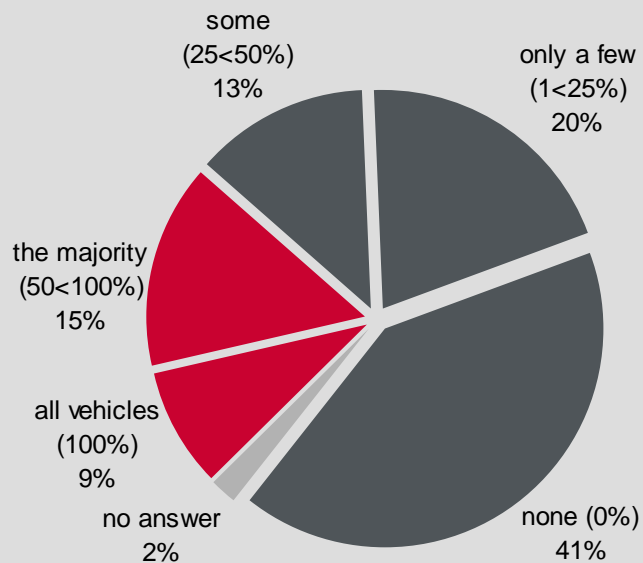
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Content

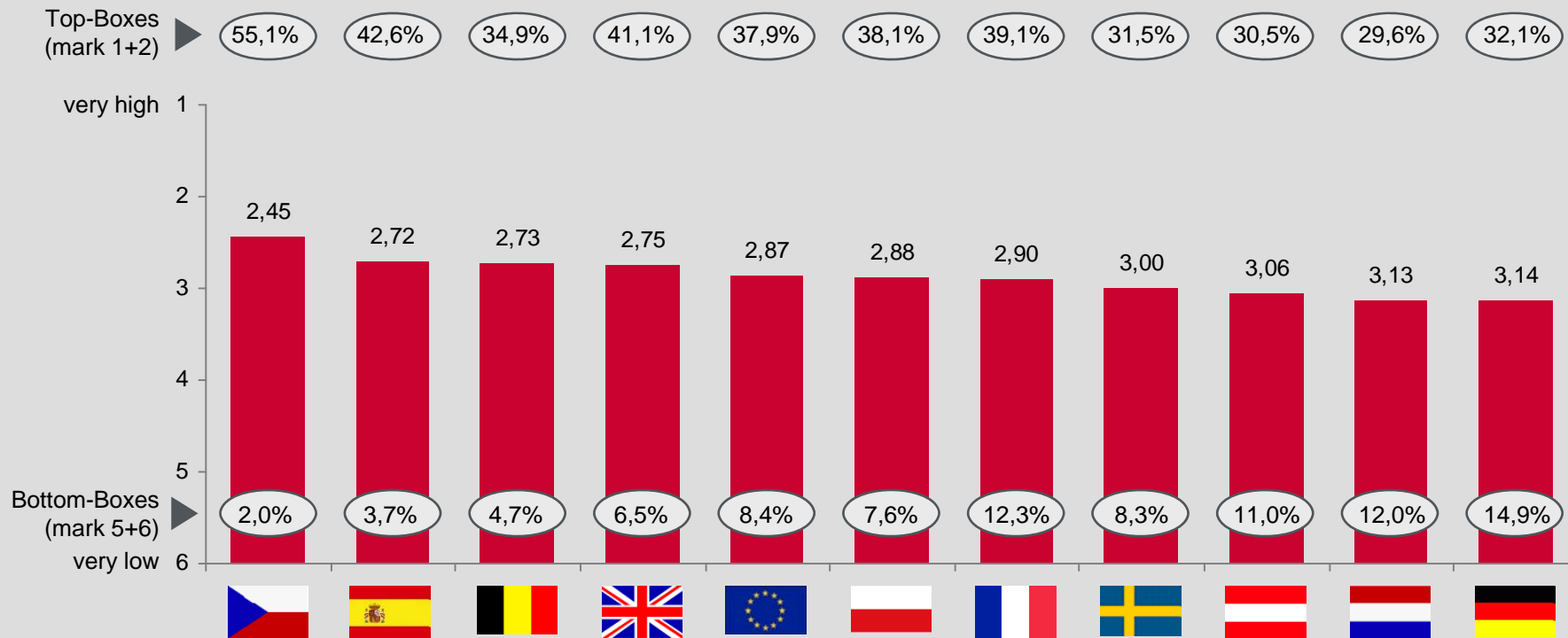
1. Background and methodological design
2. Management Summary
3. Results
 - 3.1 Statistical overview
 - 3.2 Fleet policy and purchase of new vehicles
 - 3.3 eSafety systems in fleets
 - 3.3.1 Electronic Stability Control
 - 3.3.2 Advanced Emergency Braking
 - 3.3.3 Blind Spot Monitoring
 - 3.3.4 Speed Alert
 - 3.3.5 Lane Support System
 - 3.3.6 Adaptive Headlights
 - 3.4 Potential meaning and influence of eSafety systems
 - 3.5 Preferences in information and communication

3. Results

3.4 Potential meaning and influence of eSafety systems

Please rate the potential influence of safety and assistance systems on the total costs of ownership!

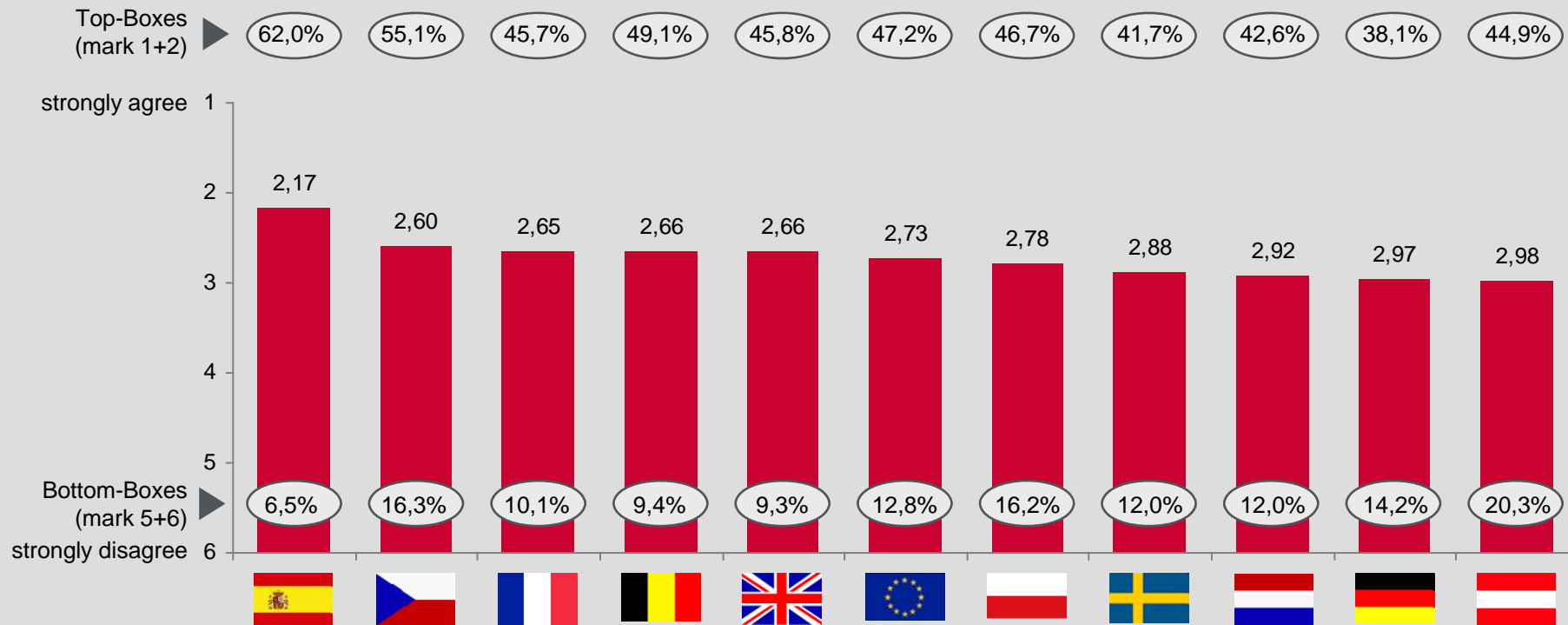
(Please rate with marks from 1 to 6: The "1" means "very high", the "6" means "very low". With the marks between you can define your vote!)



3. Results

3.4 Potential meaning and influence of eSafety systems

Do you believe that safety and assistance systems could decrease the number of the most frequently types of accidents on your fleet? (Please rate with marks from 1 to 6: The "1" means "strongly agree", the "6" means "strongly disagree". With the marks between you can define your vote!)



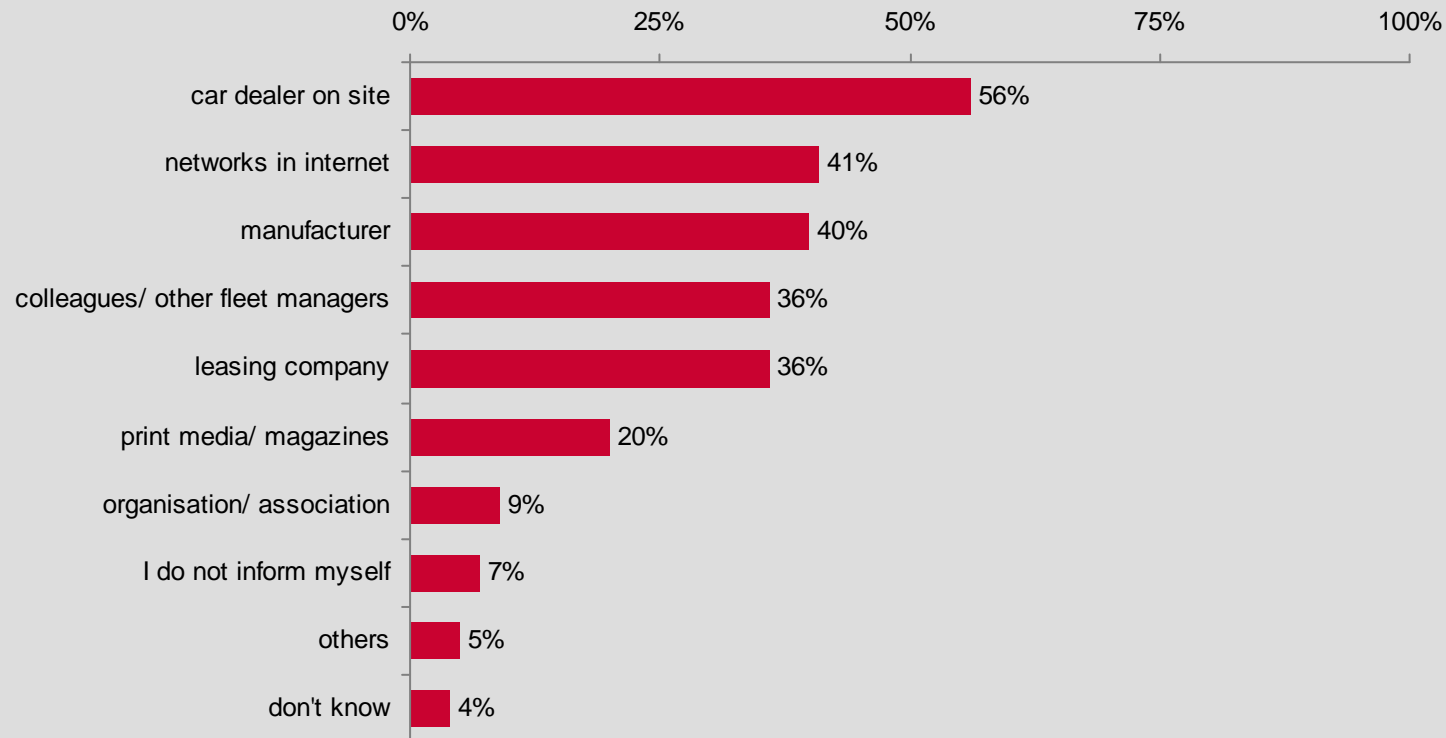
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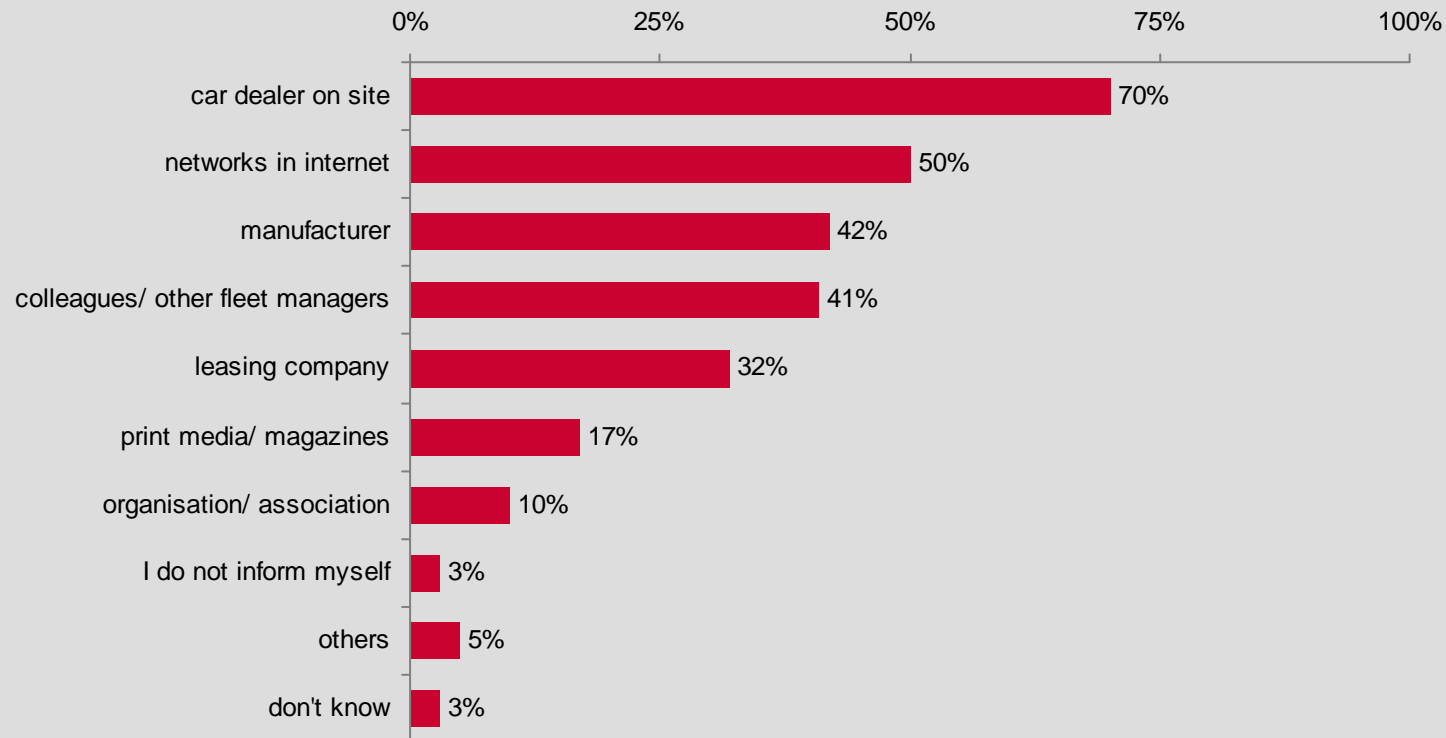
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(multiple answers possible)



3. Results

3.5 Preferences in information and communication

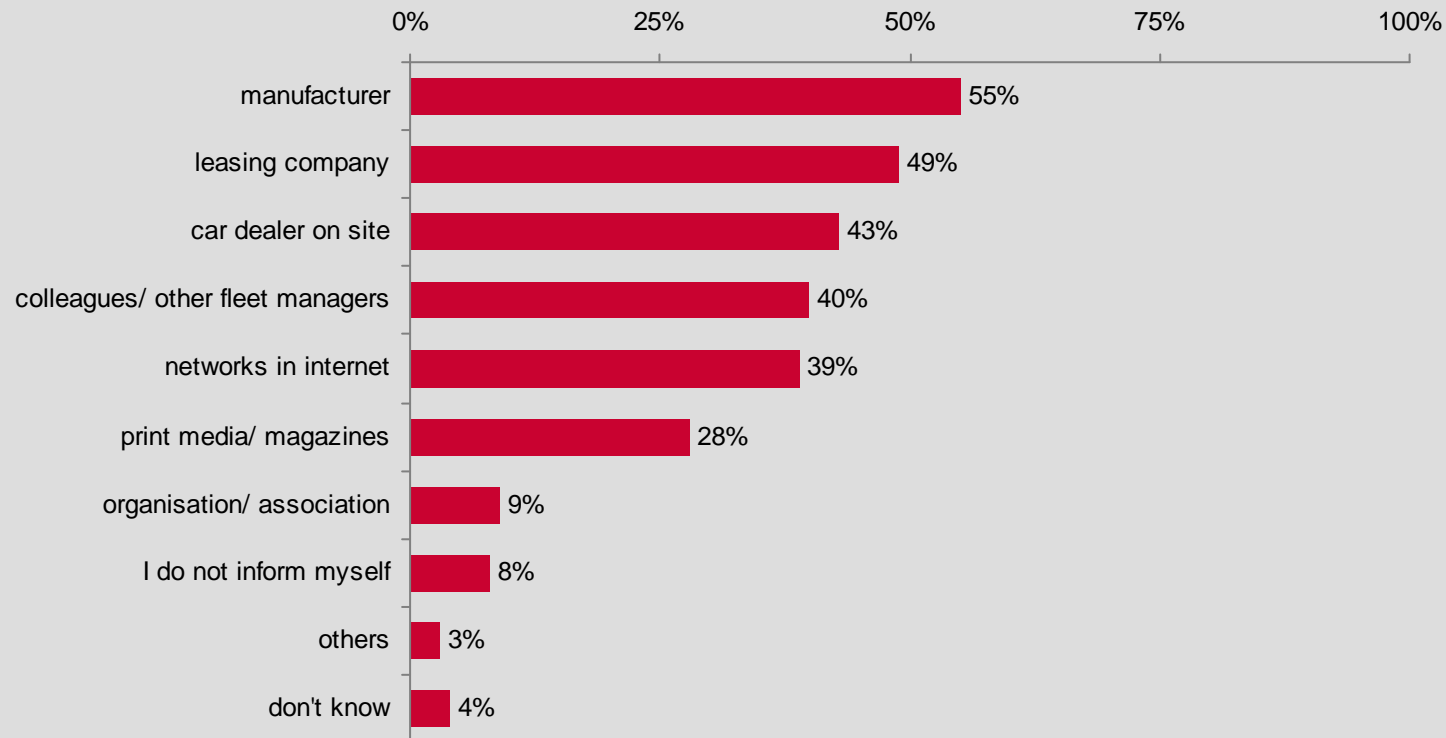
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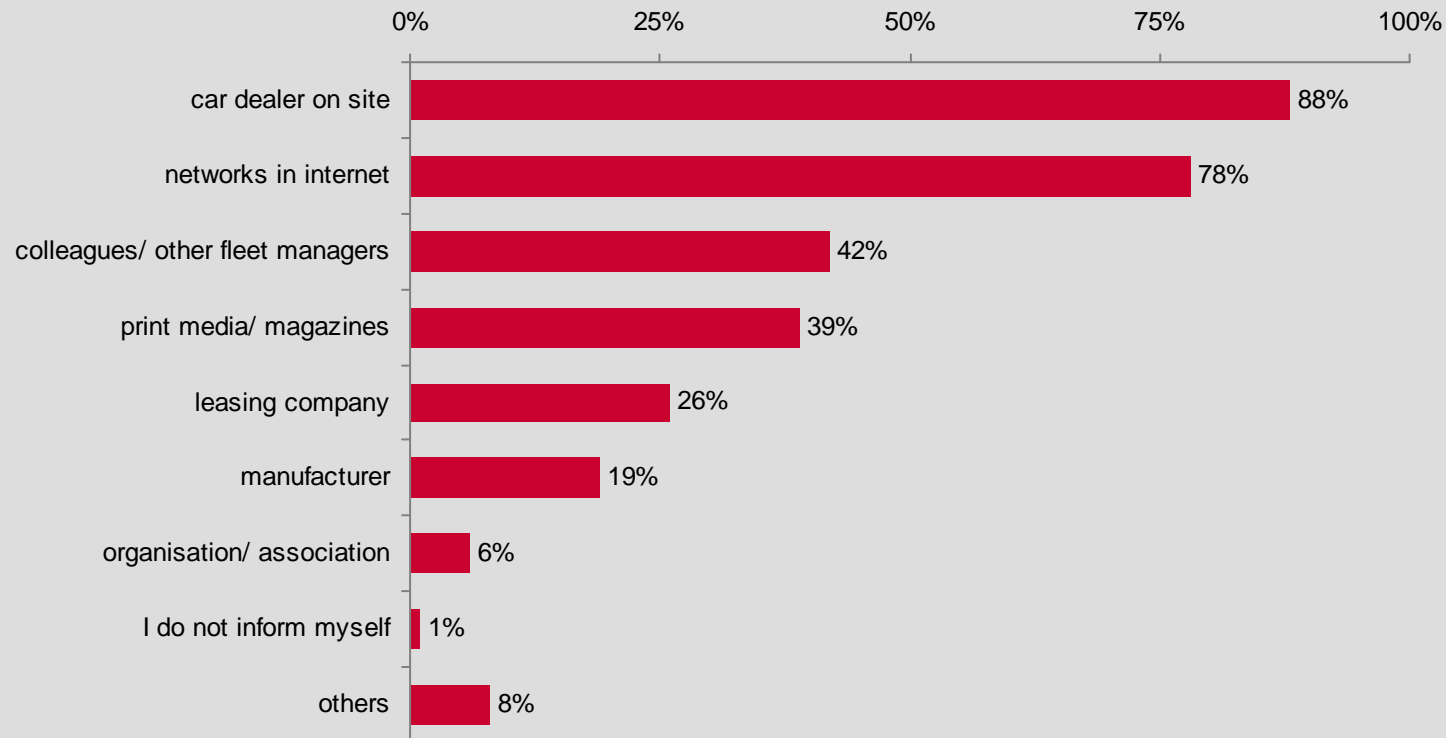
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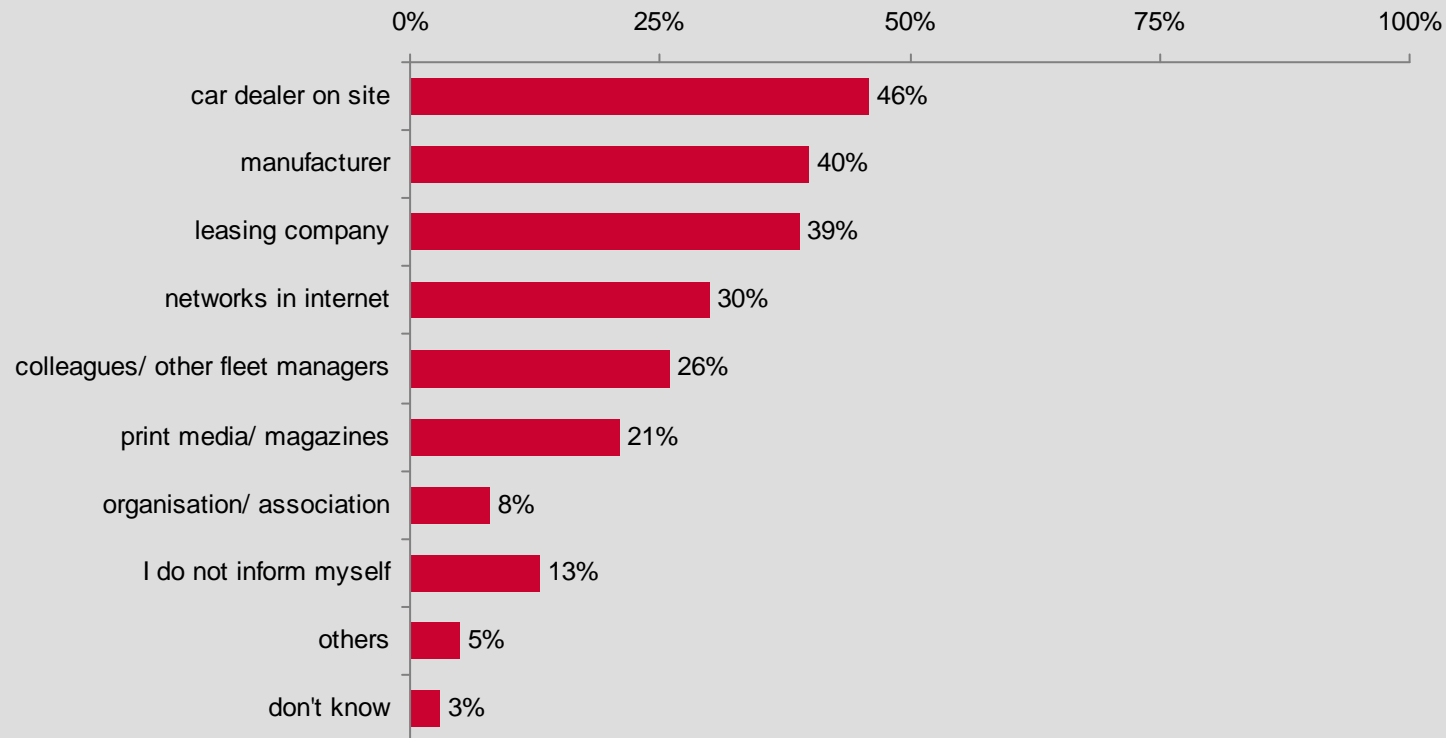
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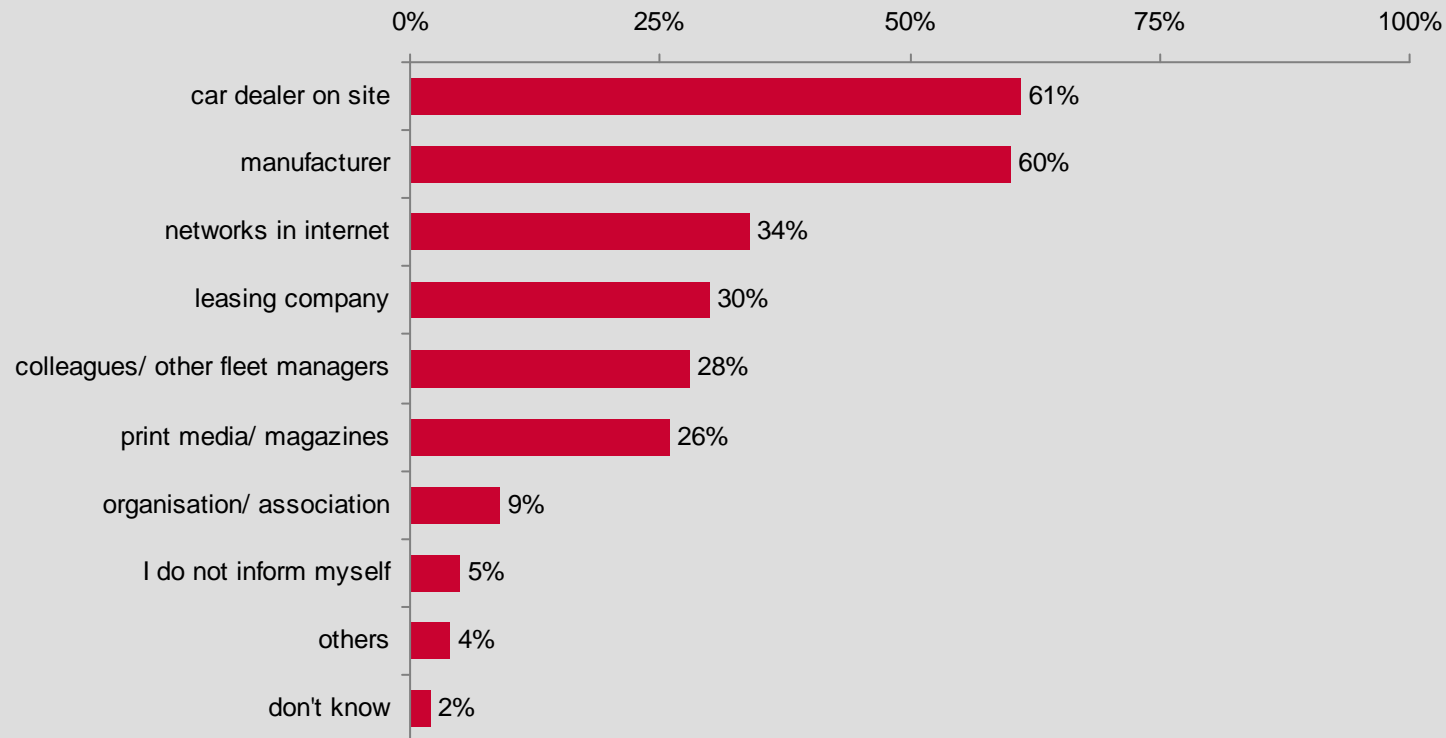
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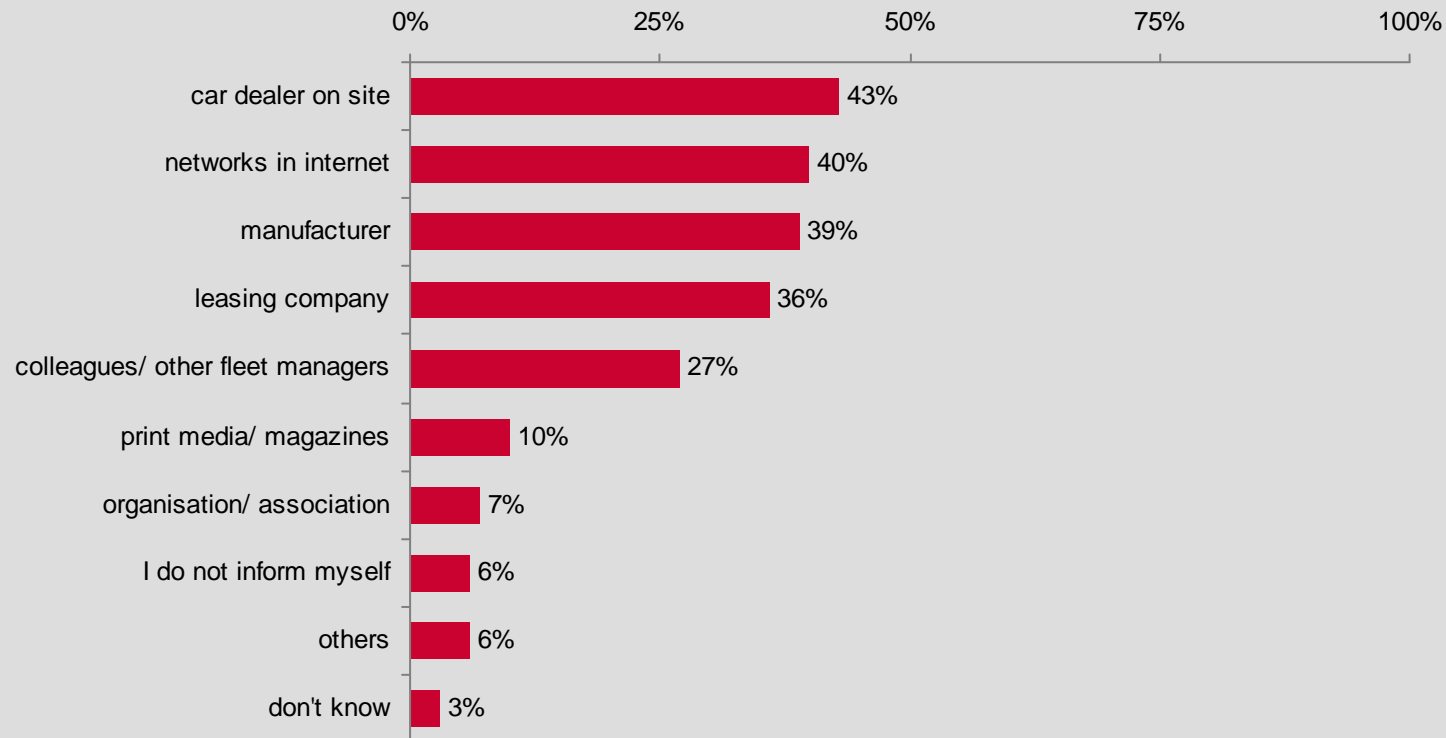
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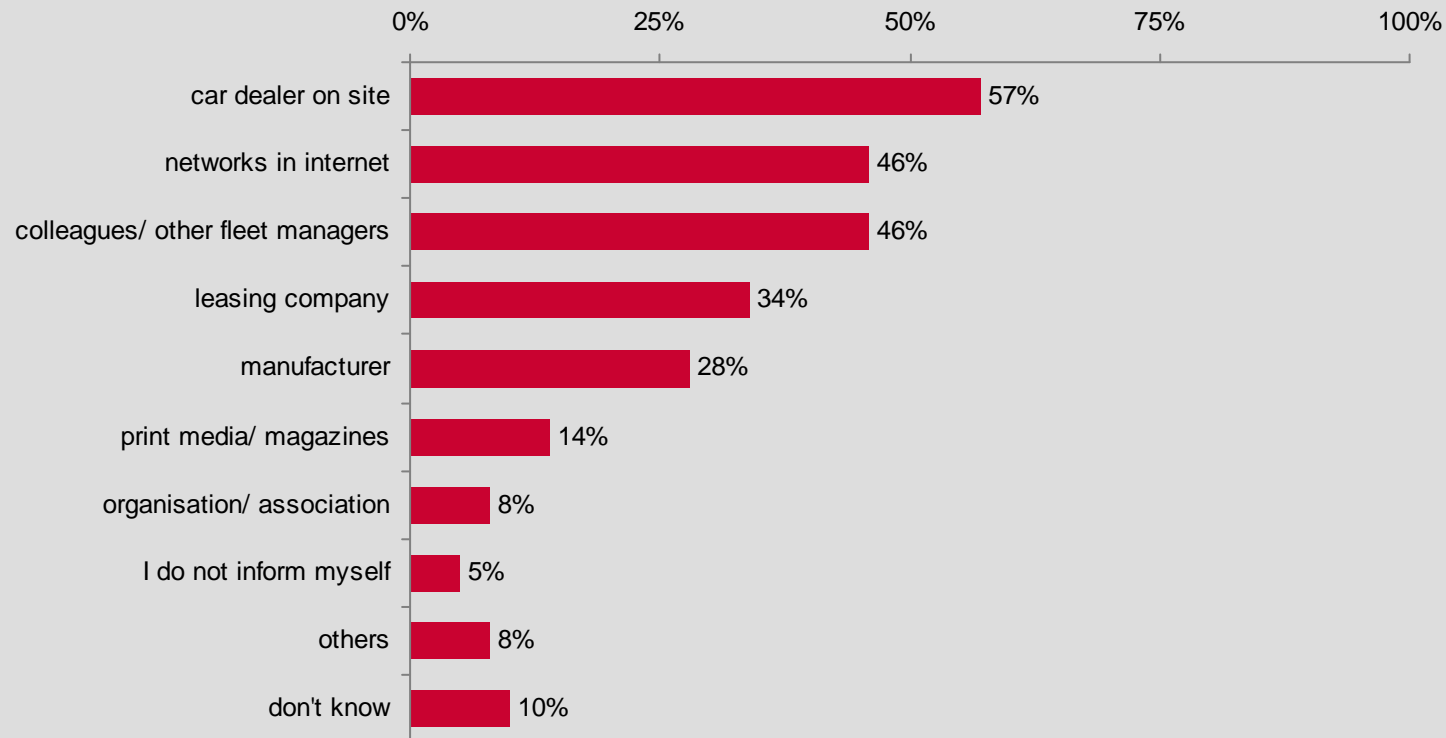
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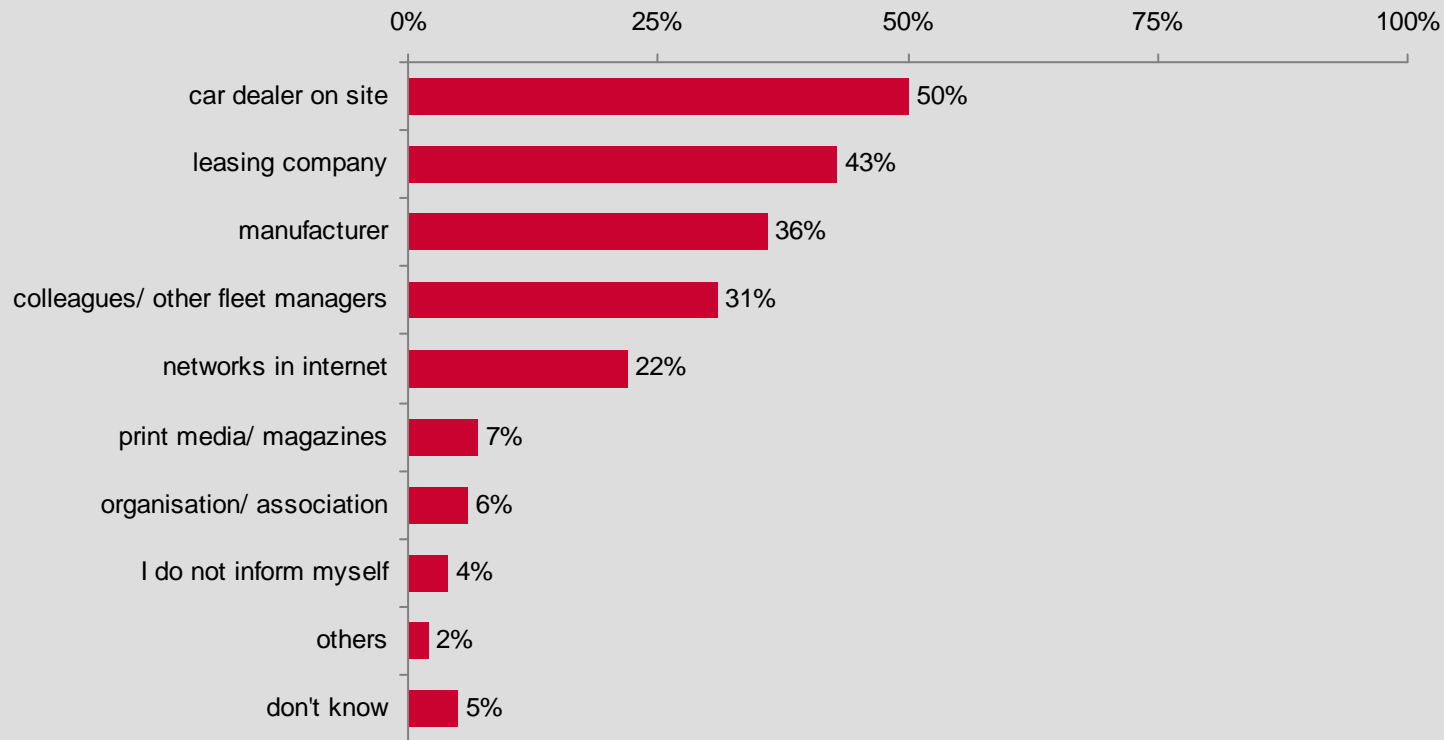
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3. Results

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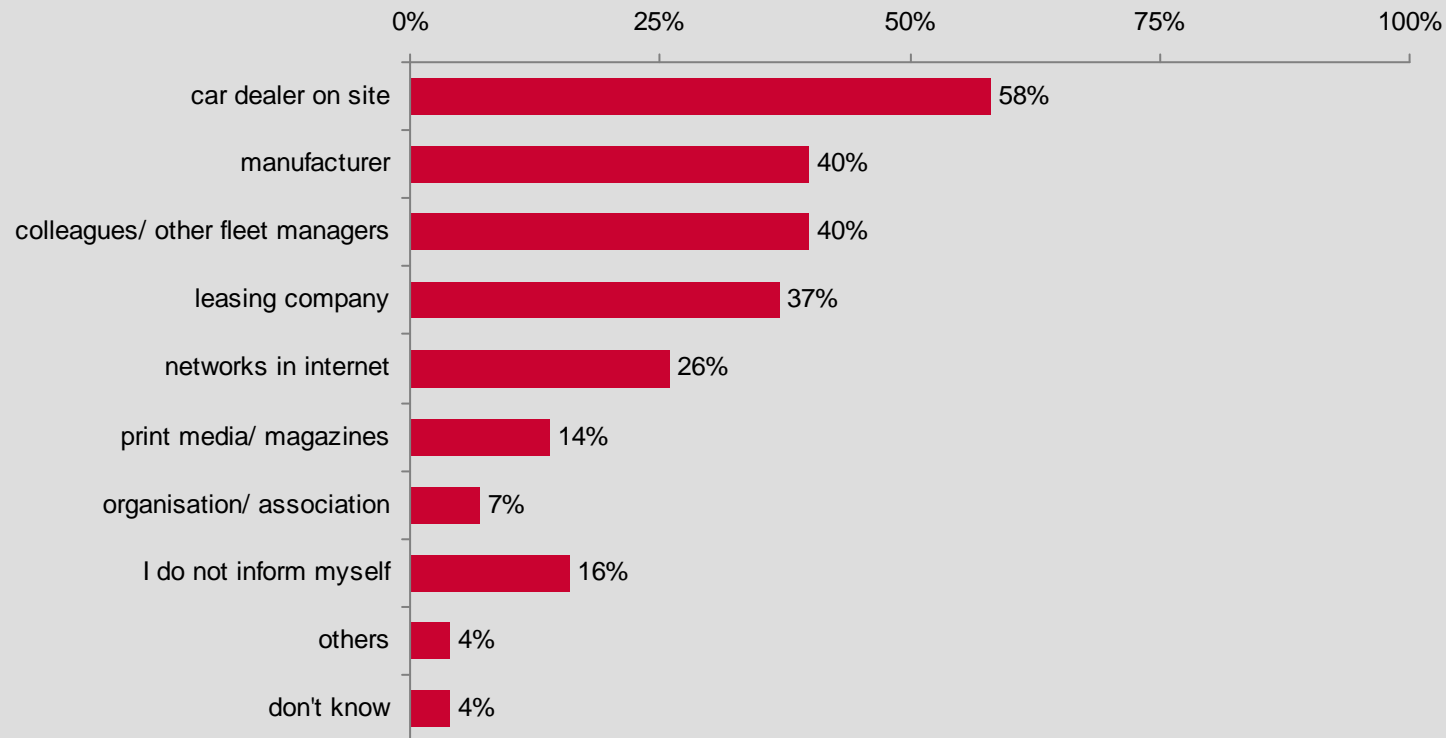


3. Results

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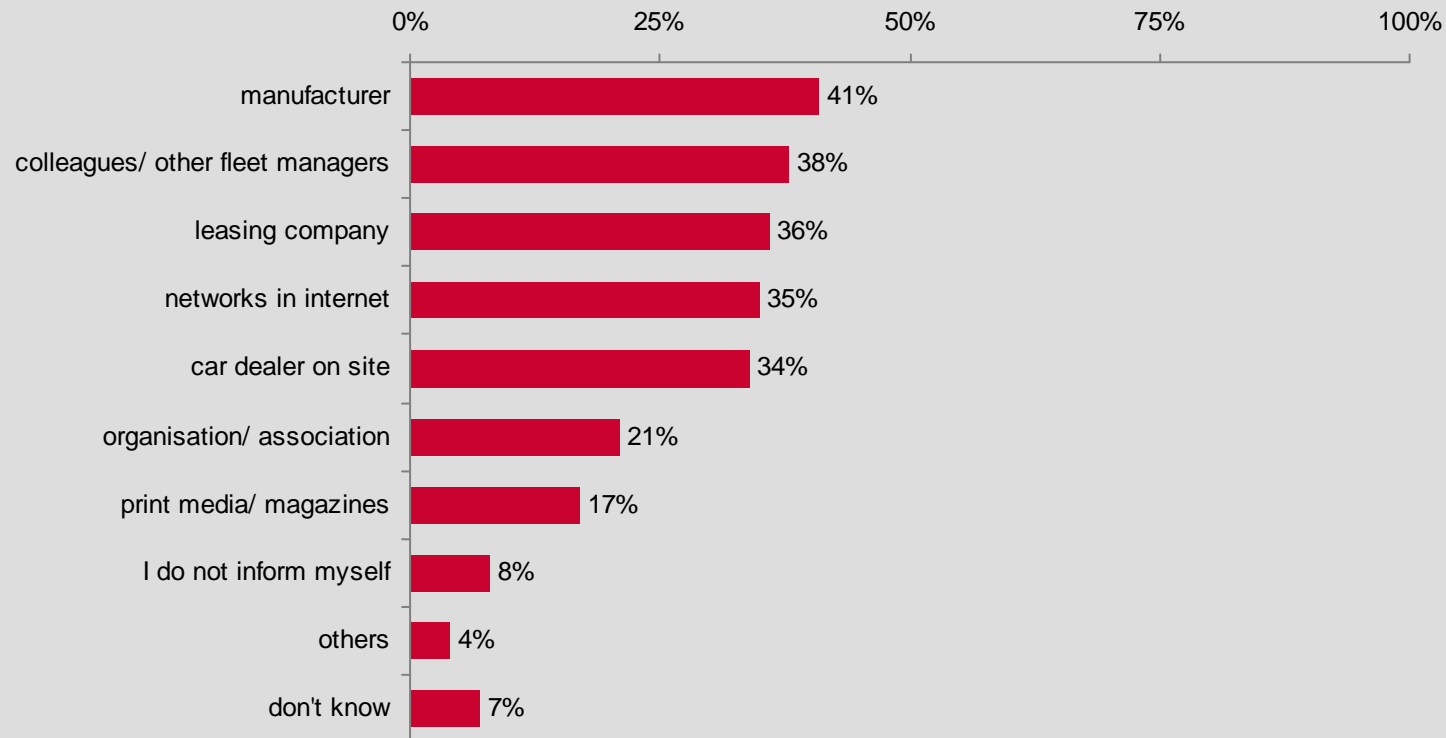


3. Results

3.5 Preferences in information and communication



Where do you inform yourself to prepare your decision for purchasing or leasing new vehicles on your fleet?
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Contact

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