

eSafetyChallenge 2010 – User-Chooser Survey



IMK GmbH

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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 fleet managers this study should look into the target group of user-choosers. User-Choosers are people driving a company car but also having the opportunity to choose specific equipment and extra features on top.

- 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 selection criteria for choosing a company car, installation rates of specific safety technologies and reasons for not having them on board as well as sources of information and responsibilities ensuring safe company cars
- The study was focused on the following six technologies:

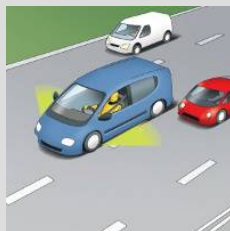
Electronic Stability Control



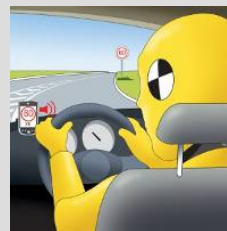
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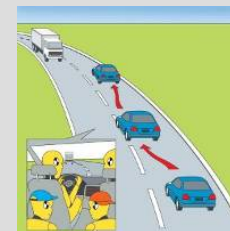
Blind Spot Monitoring



Speed Alert



Lane Support System



Adaptive Headlights



1. Background and methodological design

Study design

The study was planned and conducted as an online survey using a European wide web-panel. 2,000 subjects from 10 selected countries have been interviewed during a period of three weeks.

Target group

- Company car drivers in Europe
- Must have chosen their company car themselves
- 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=2,000 interviews, n=200 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 16
- Conducting interviews between cw 13 and cw 15

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2. Management Summary

Selection criteria

- Half of the user-choosers have restrictive criteria when choosing their company car
- Leasing rate/ price highest relevant restrictive selection criteria; safety only in each seventh case
- Safety plays a major role under the non-restrictive selection criteria; only reliability and comfort and equipment count more
- CO₂-emissions is neither restrictive nor non-restrictive a relevant selection criteria

Sources of information

- User-Choosers prefer to inform themselves in the internet (in general) and at car dealers on-site
- The companies' fleet manager is of lower importance for the user-choosers

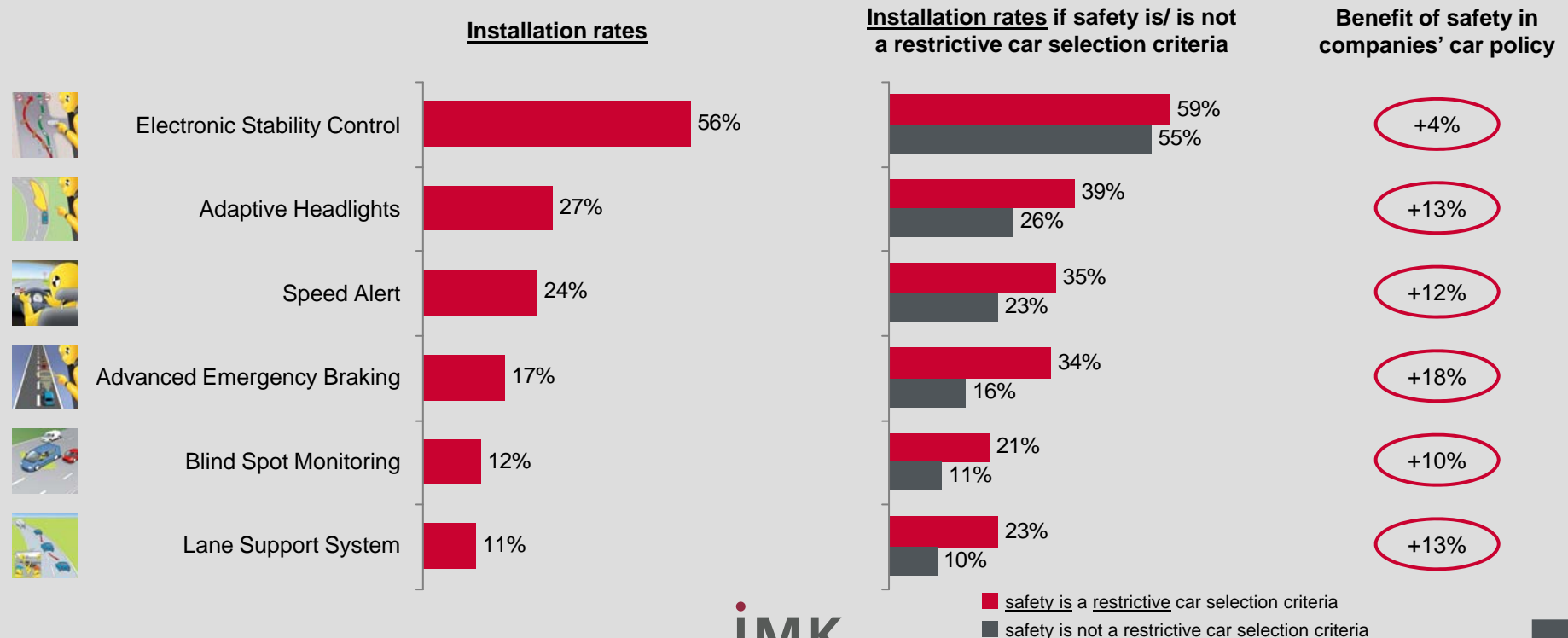
Responsibility safe car

- Almost the half of the user-choosers wants to be responsible on their own ensuring that the company car is a safe car; one-third wants the manufacturers to be responsible but the companies' fleet manager or the car dealer on-site are not seen to be responsible in this matter

2. Management Summary

Installation rates of eSafety technologies in company cars

- Electronic Stability Control is the only eSafety technology that is installed in more than the half of all company cars
- Most frequent reason for not having these systems on board is the unavailability for the driven brand and model, after comes unawareness but the price does not seem to be a reason













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3. Results

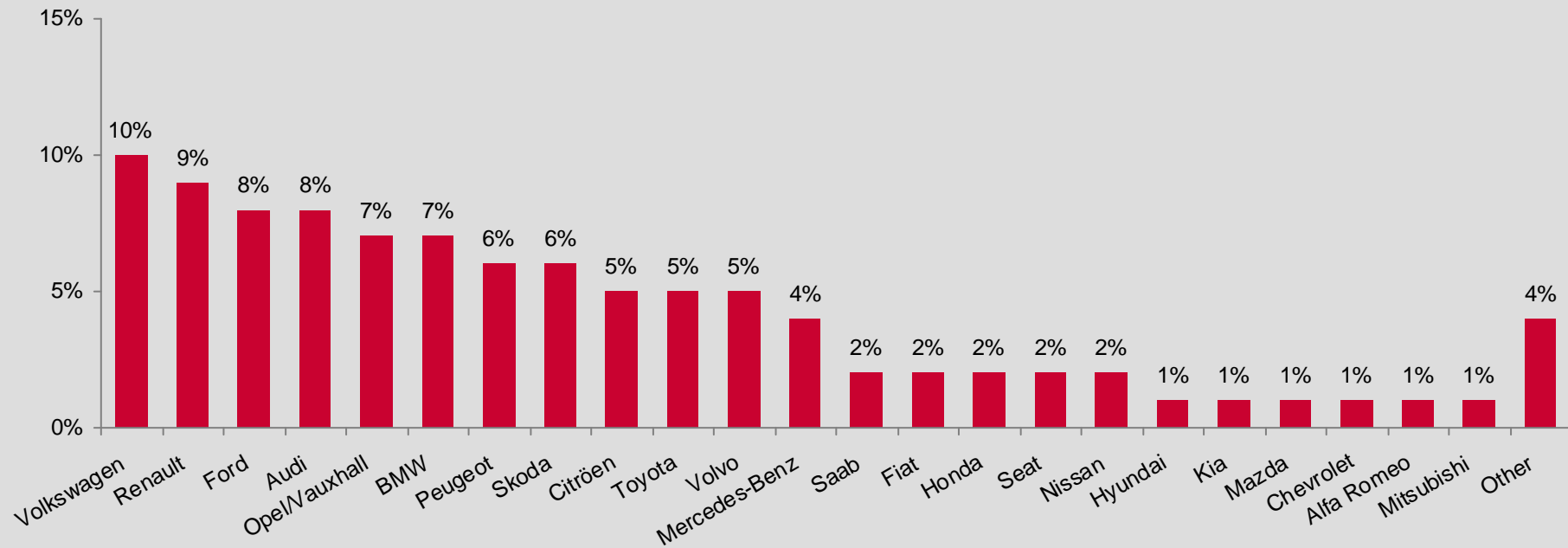
3.1 Statistical overview

	Total										
Number of interviews	2,006	200	200	201	200	203	202	200	200	200	200
Did you choose your present company car?											
I selected the car on my own	75%	64%	78%	77%	71%	79%	80%	68%	89%	67%	77%
I selected the car from a given list	25%	36%	23%	23%	30%	21%	20%	33%	12%	34%	24%
Gender											
male	74%	77%	70%	79%	94%	69%	82%	71%	60%	78%	58%
female	26%	24%	30%	21%	7%	31%	18%	29%	40%	22%	43%
Age											
average in years	41	42	44	42	39	42	40	39	38	44	37

3. Results

3.1 Statistical overview

Which brand is the company car that you drive at the moment?



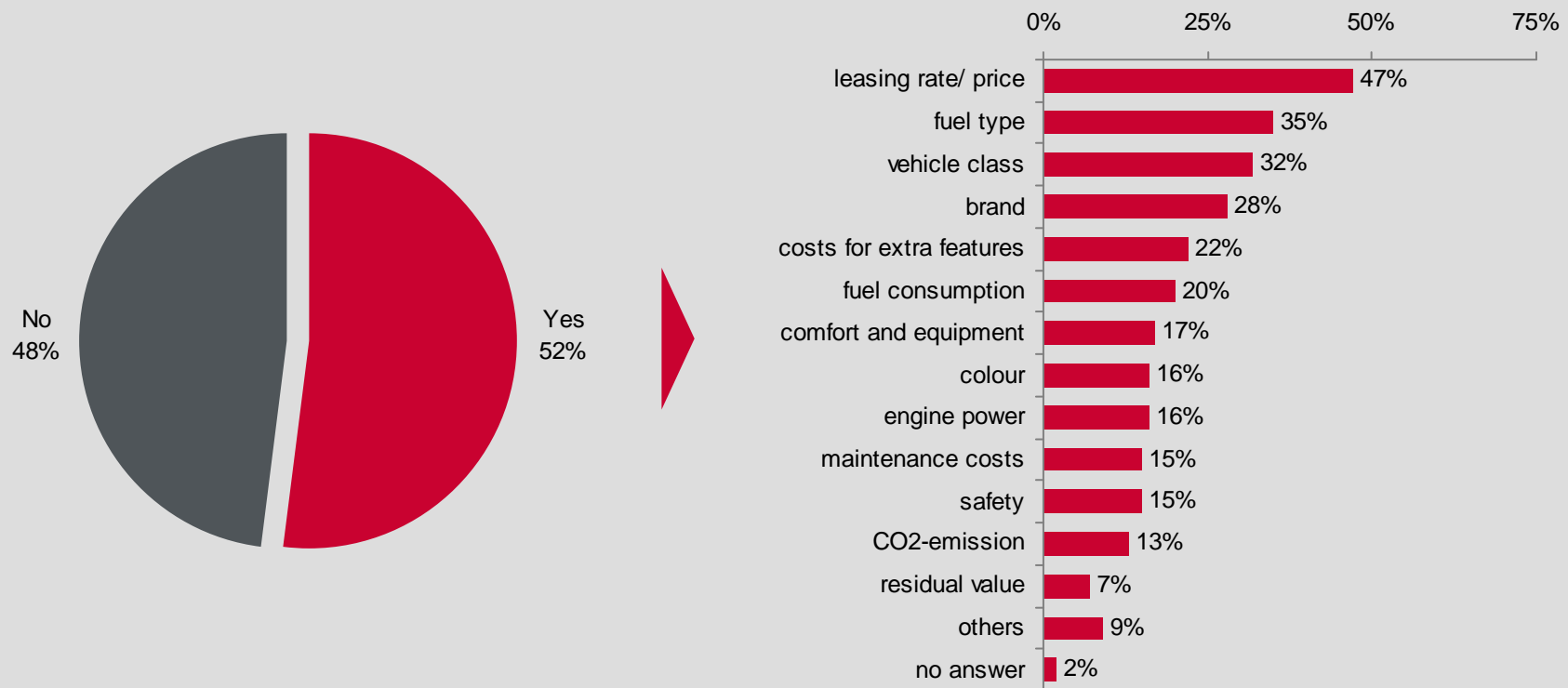
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3. Results

3.2 Selection criteria for choosing a company car

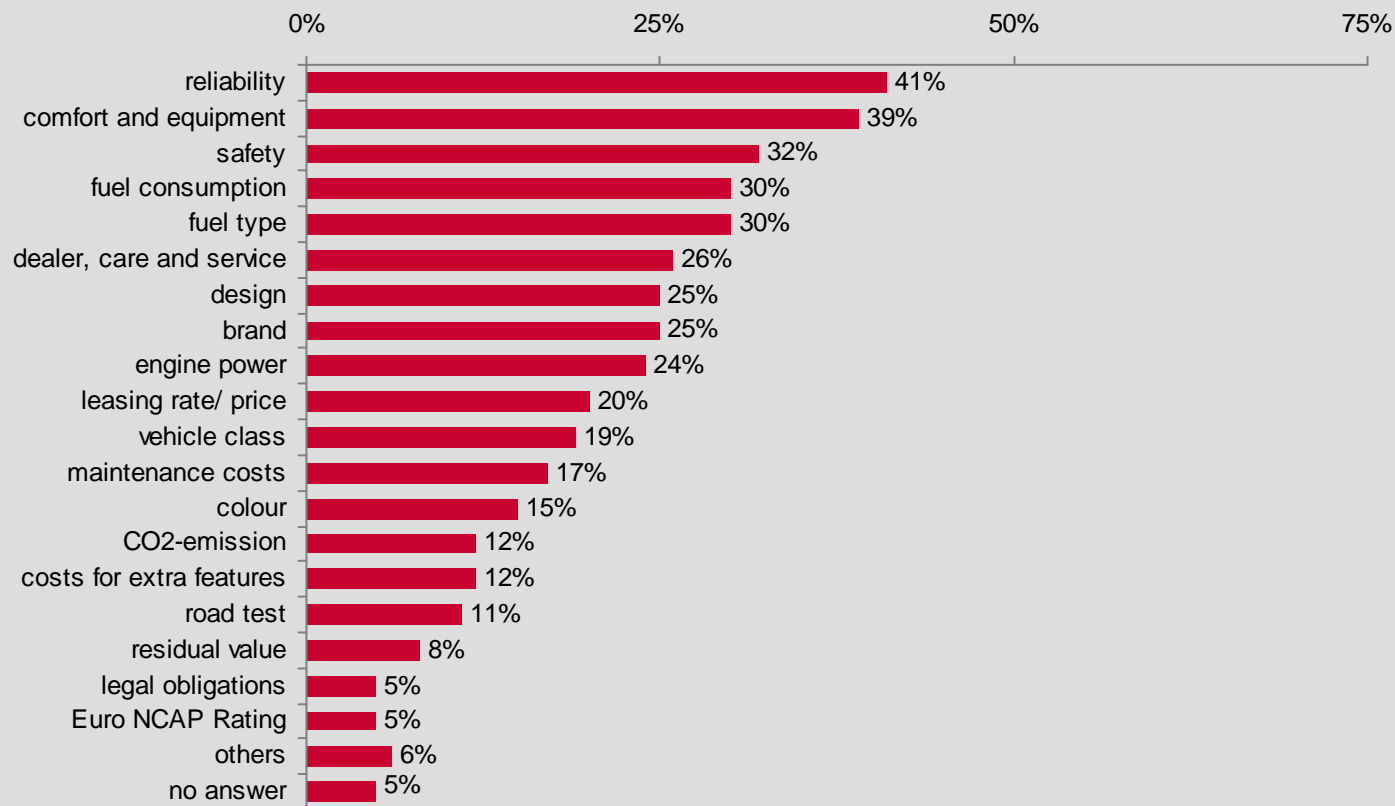
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Which restrictive criteria did you have? (multiple answers possible; filter: only respondents with "yes")



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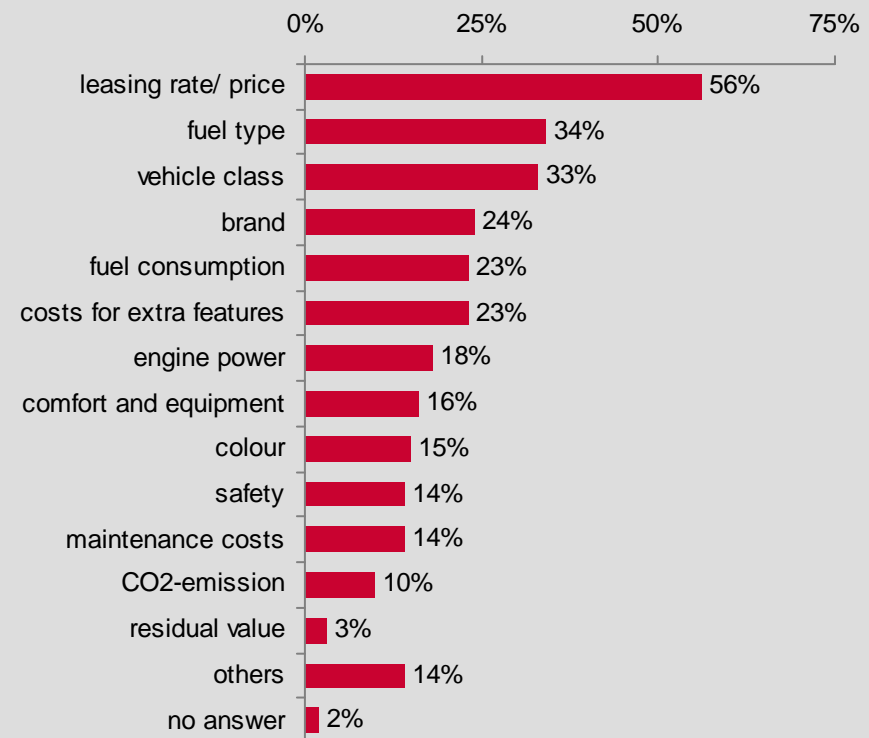
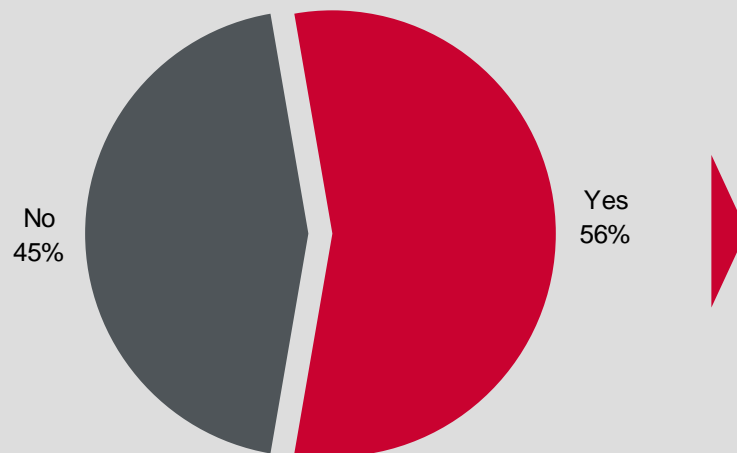
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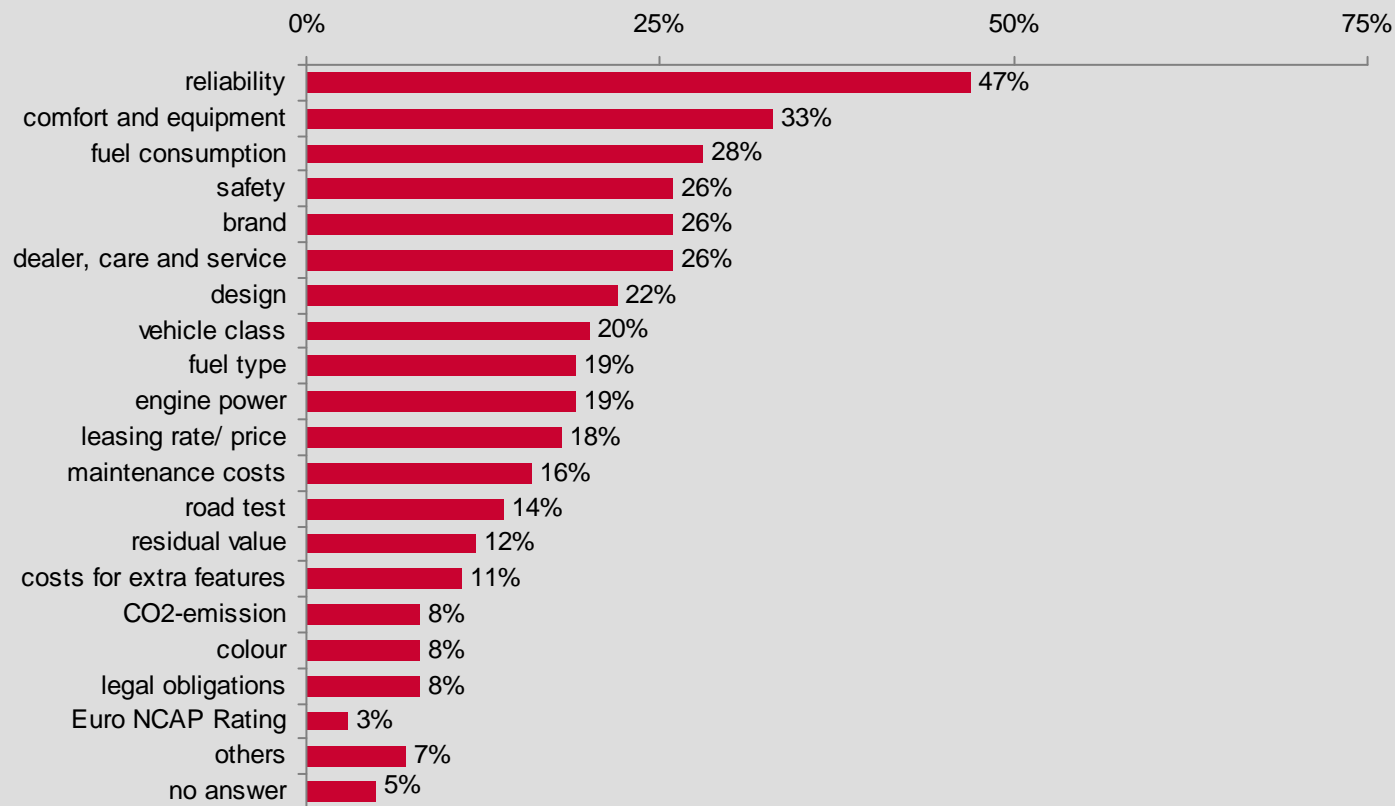
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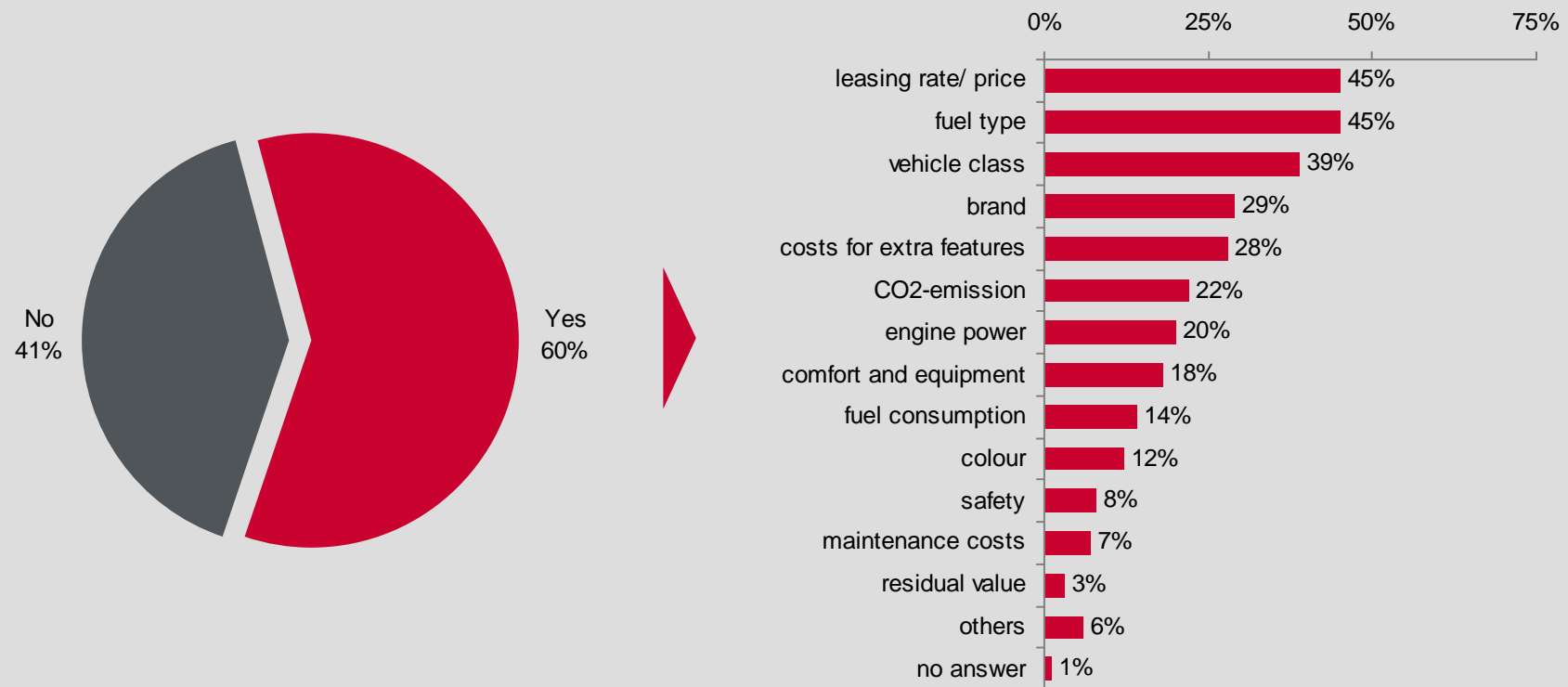
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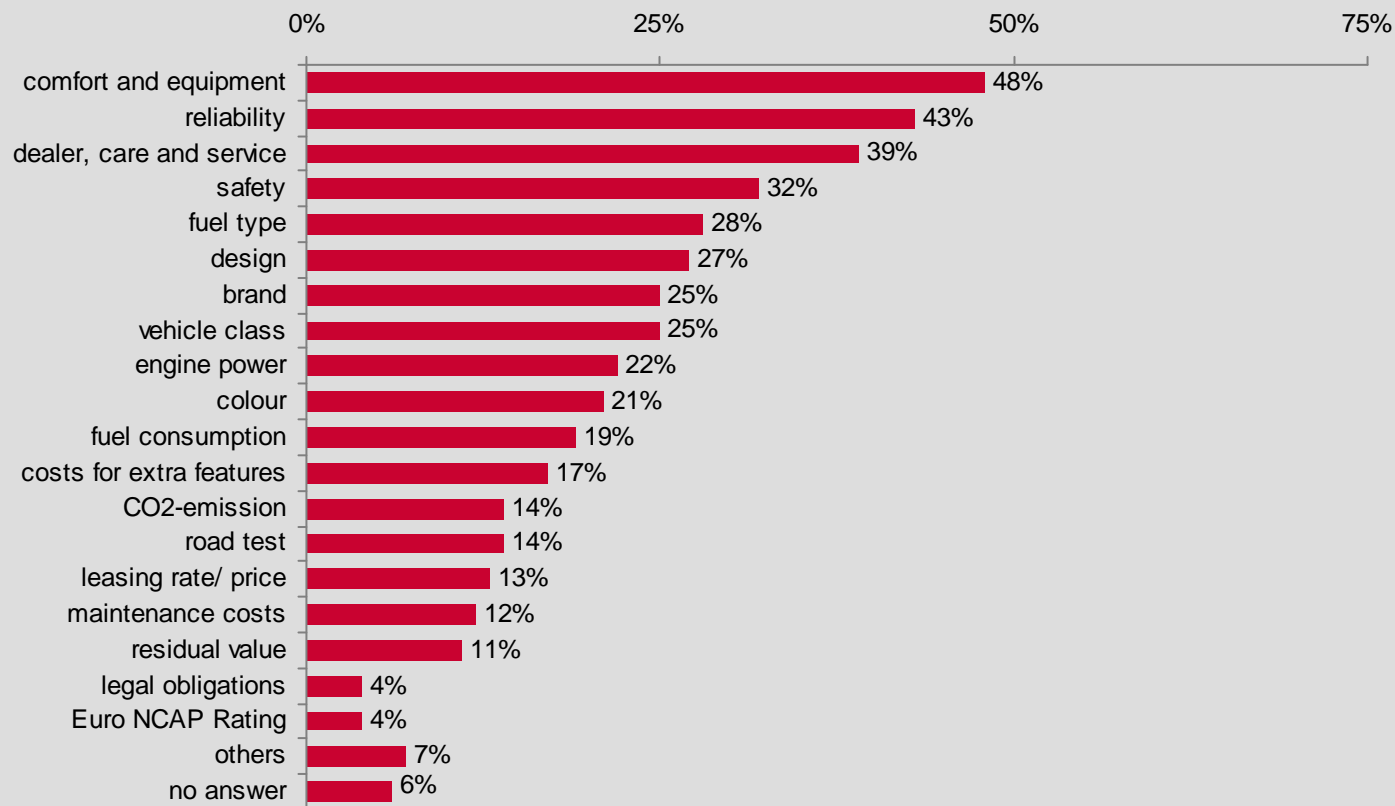
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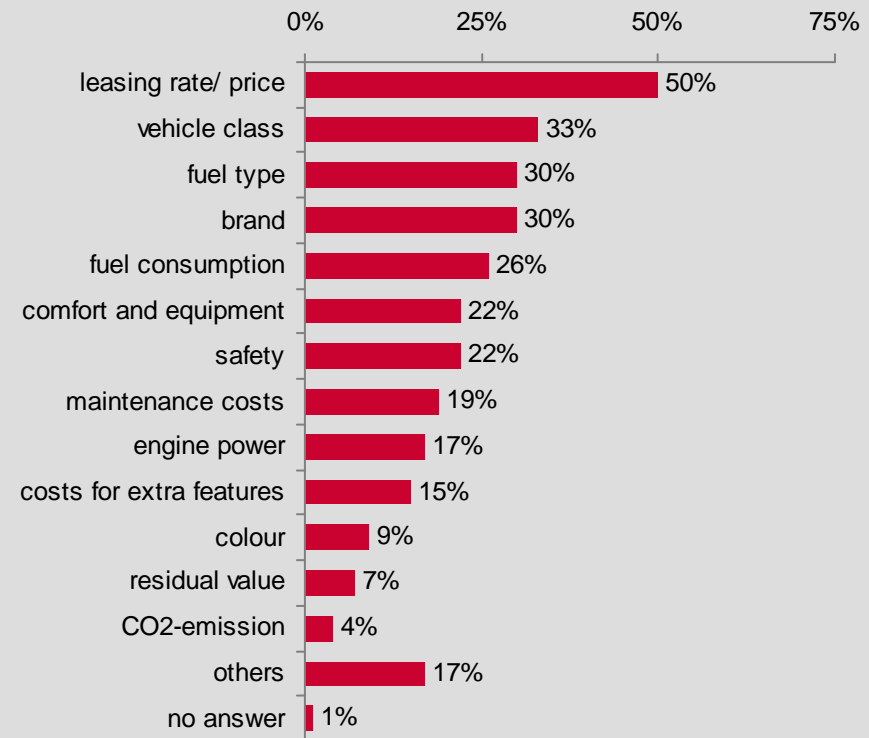
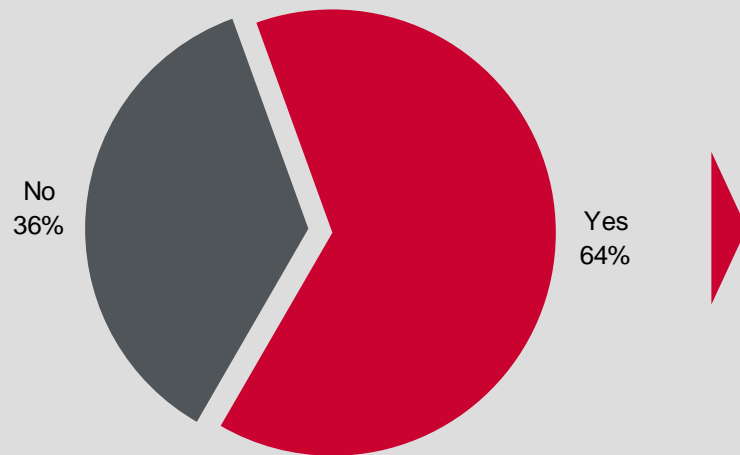
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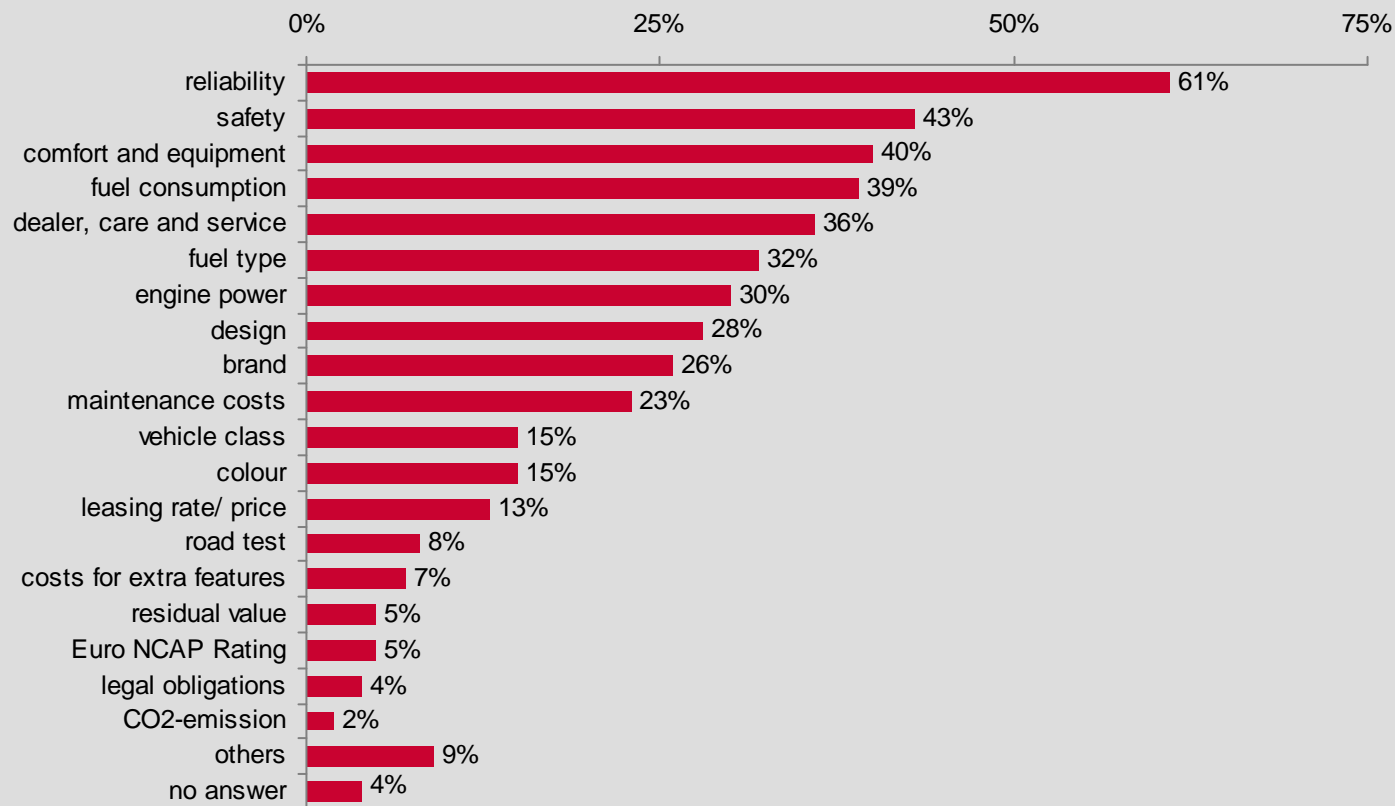
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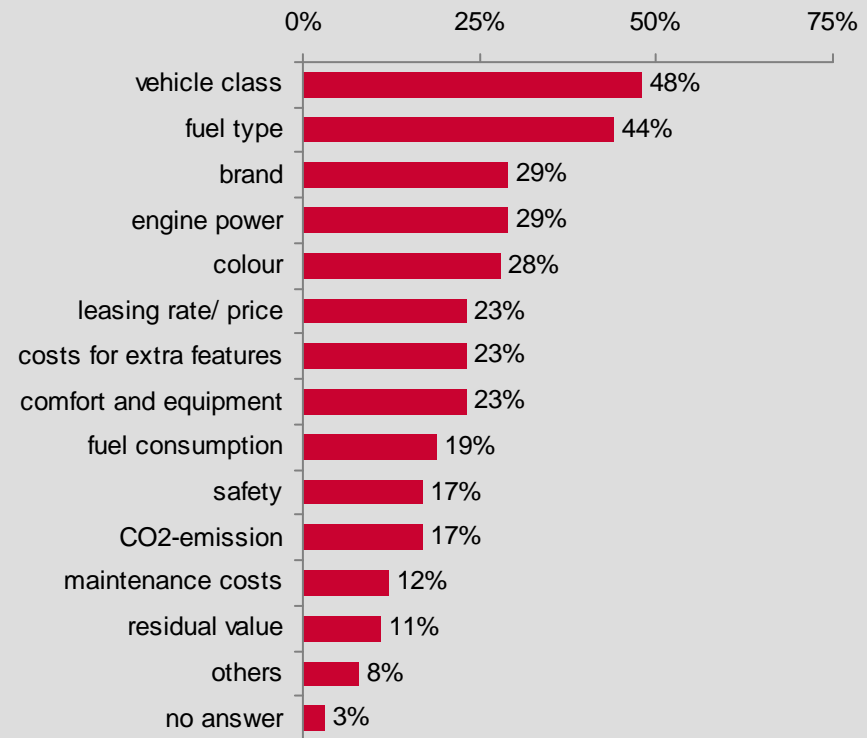
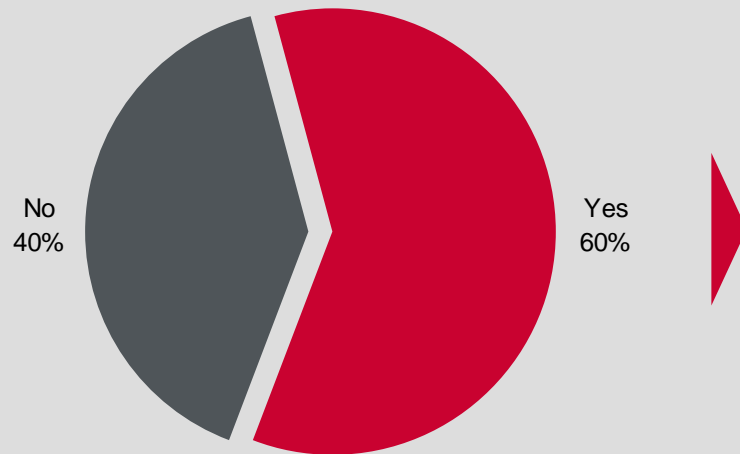
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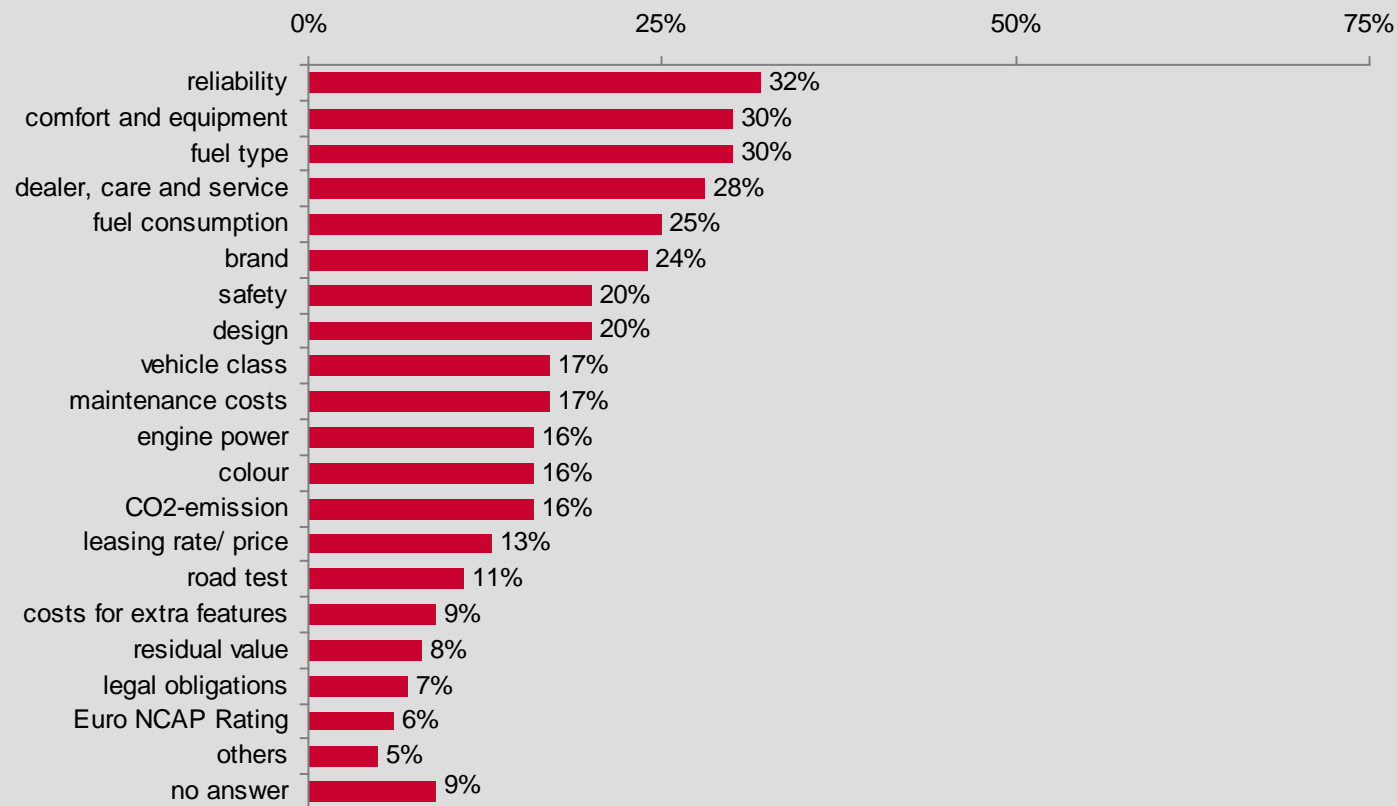
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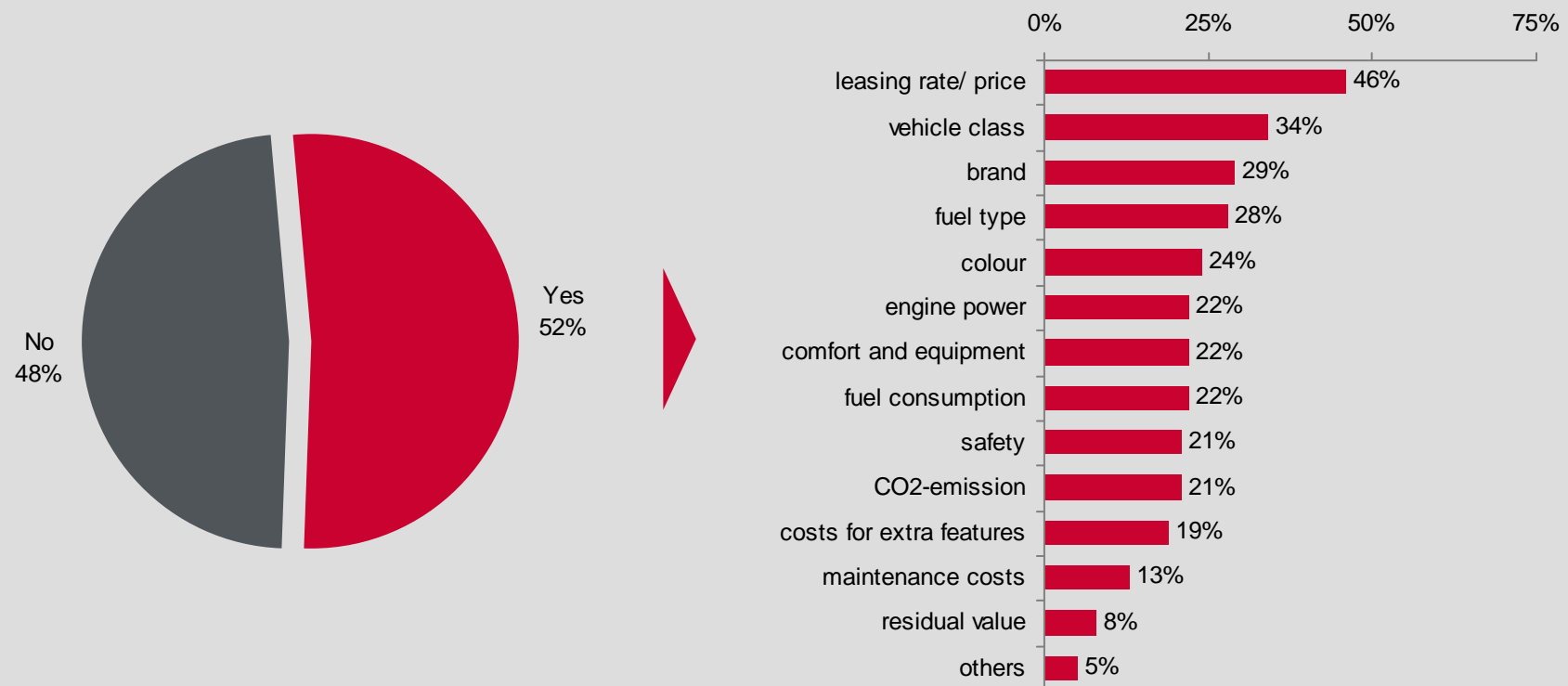
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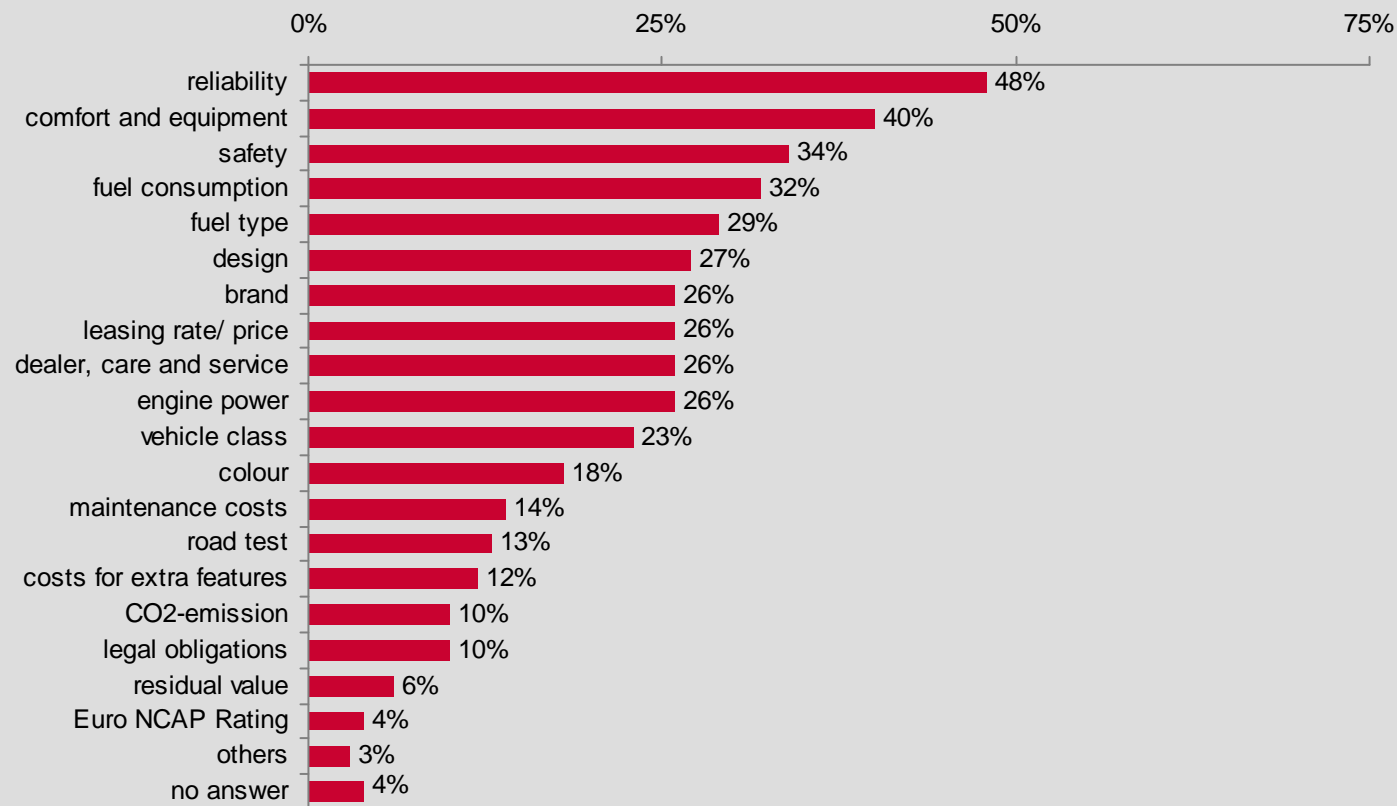
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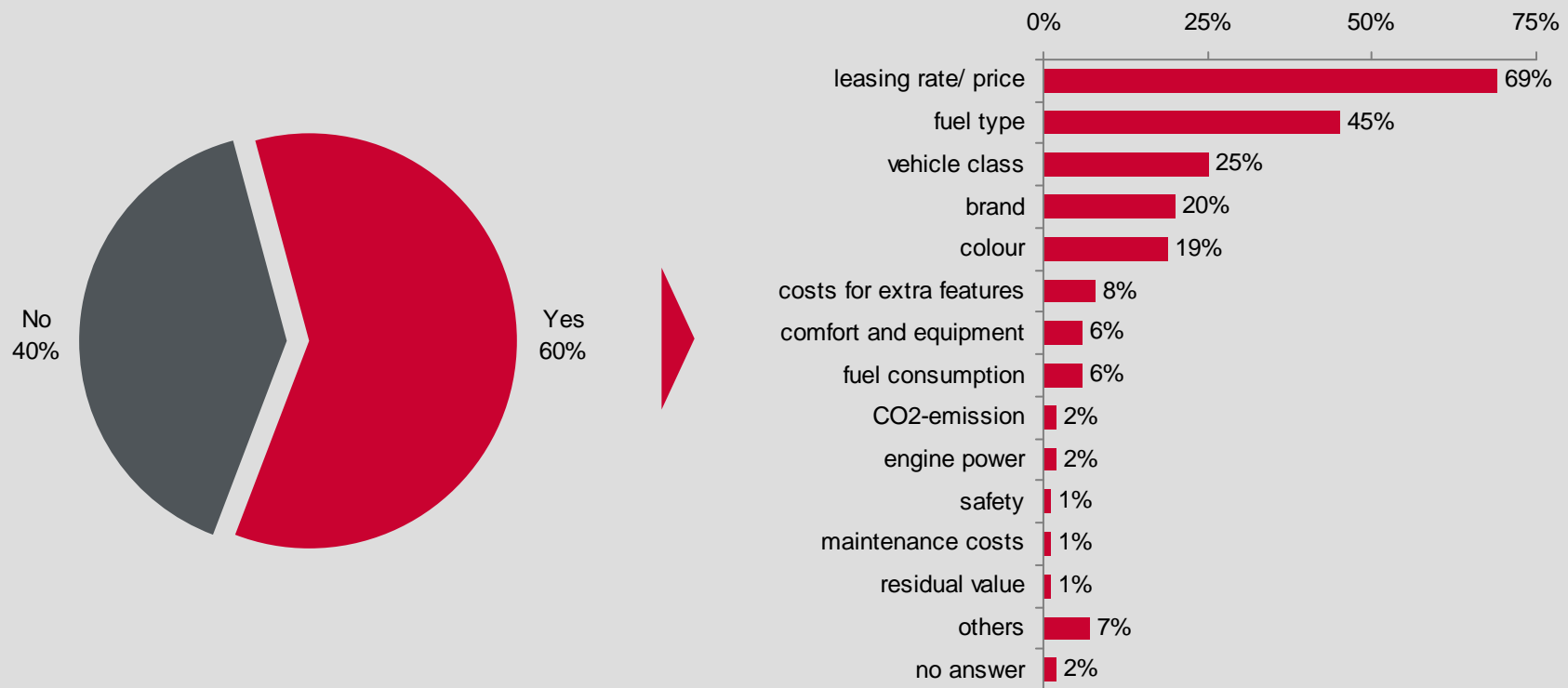
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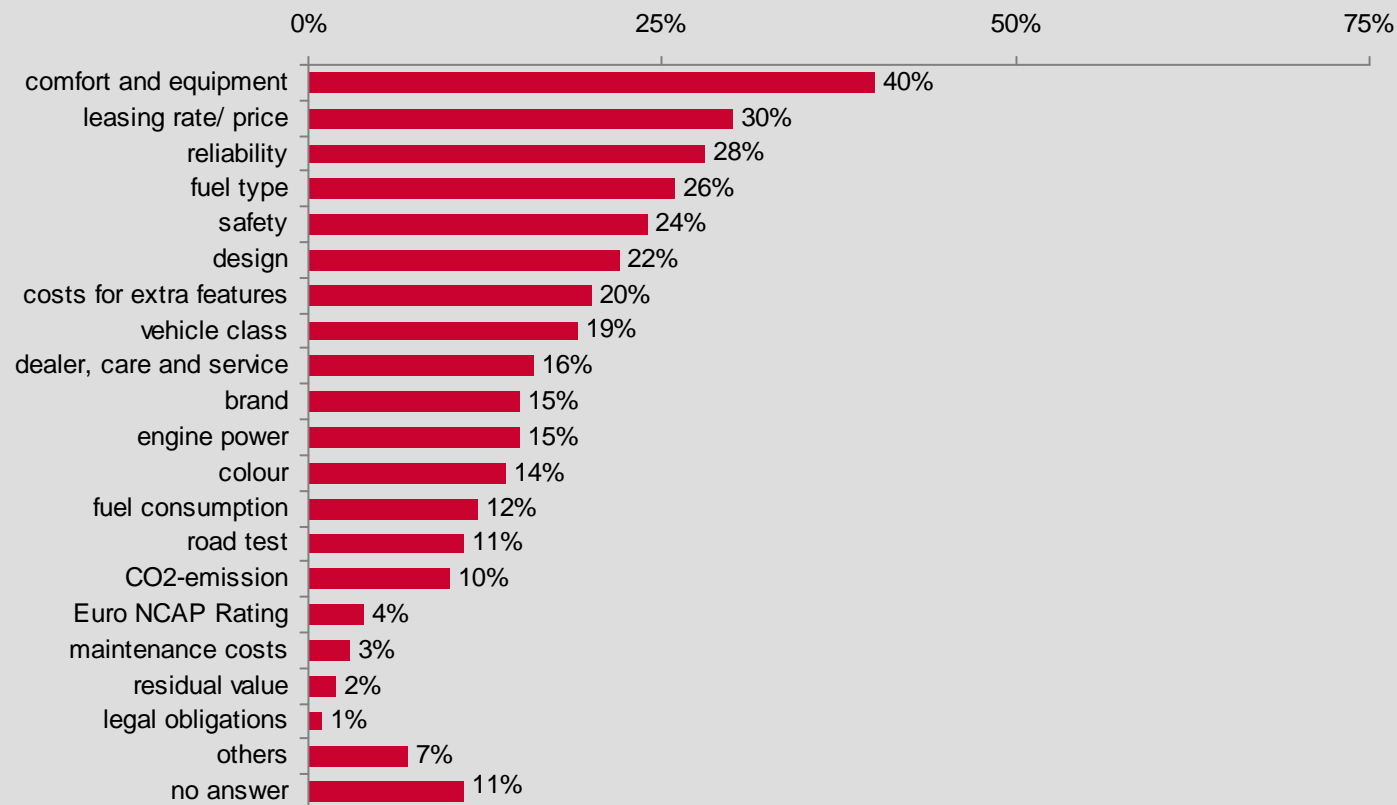
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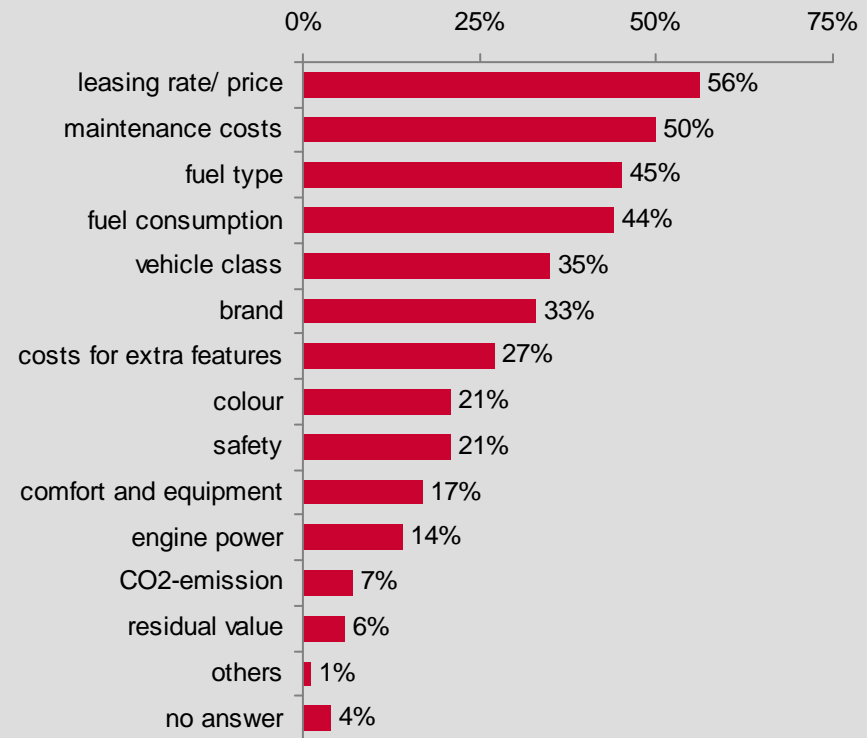
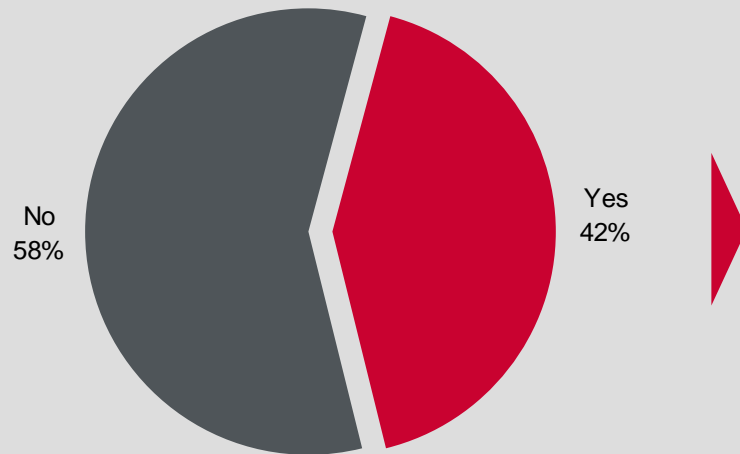
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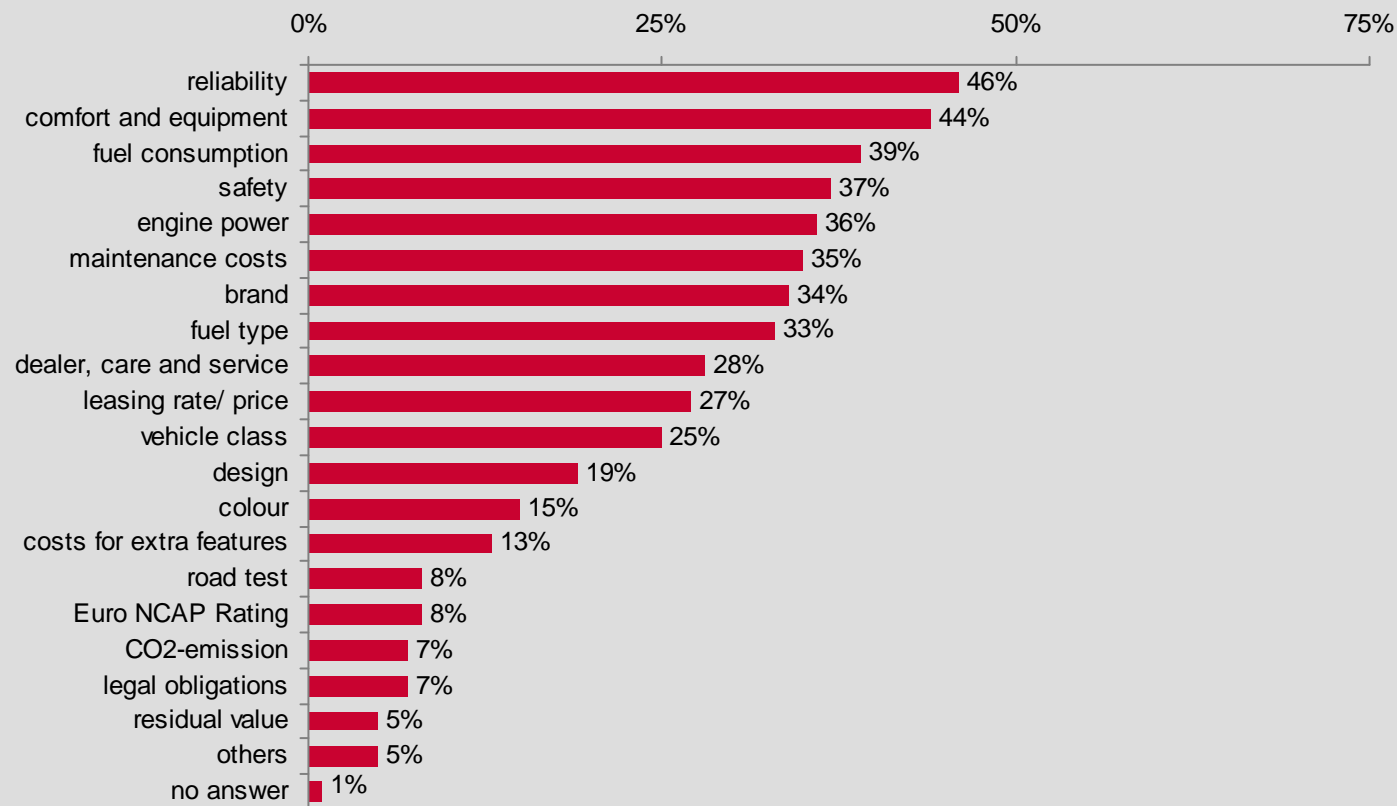
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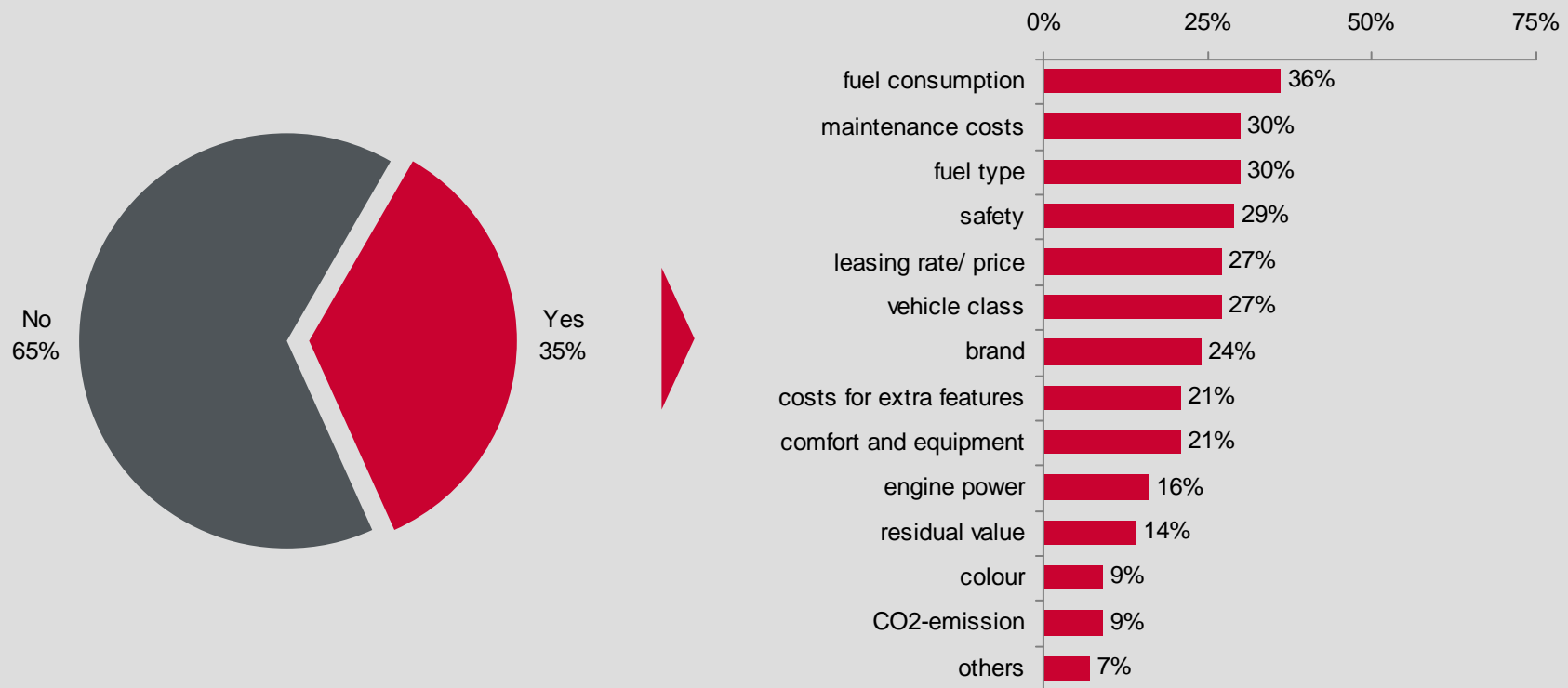
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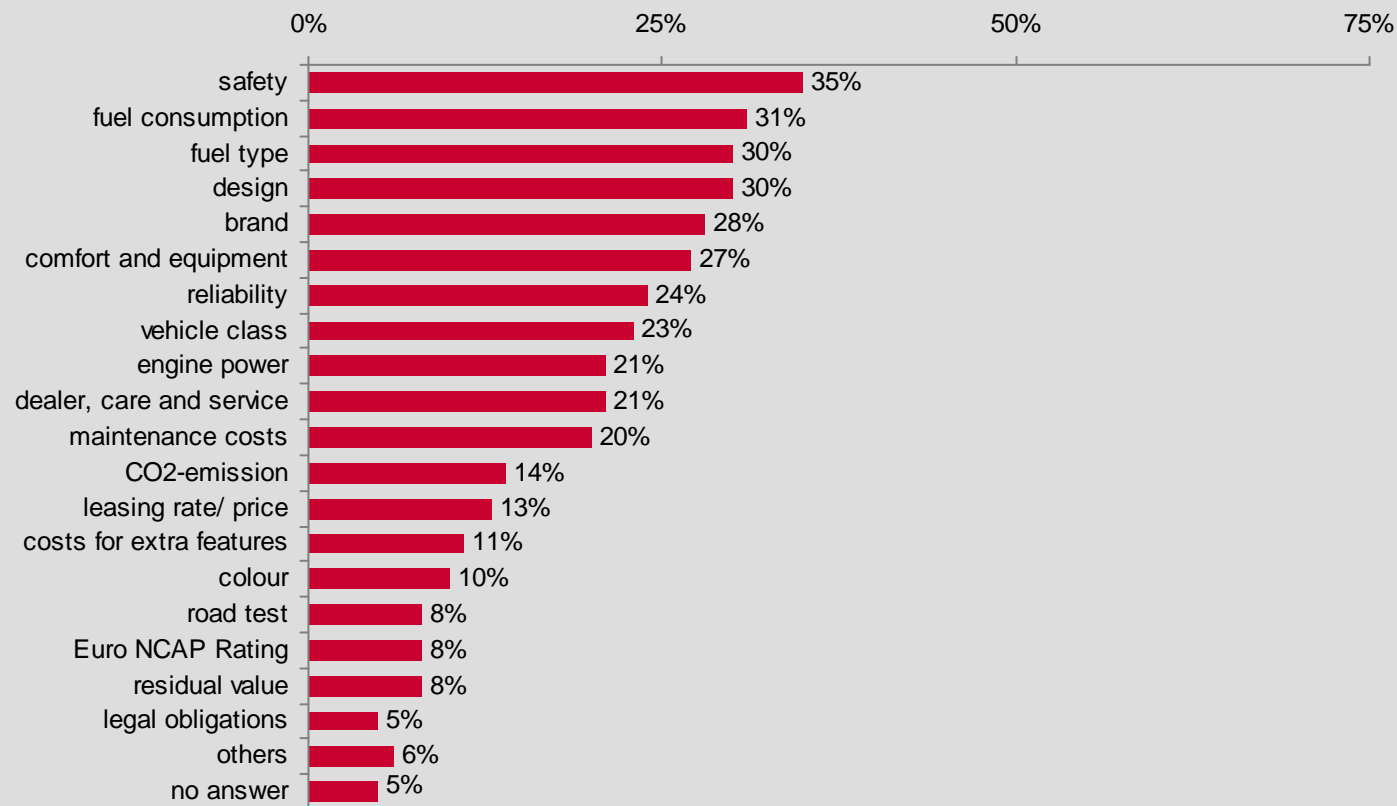


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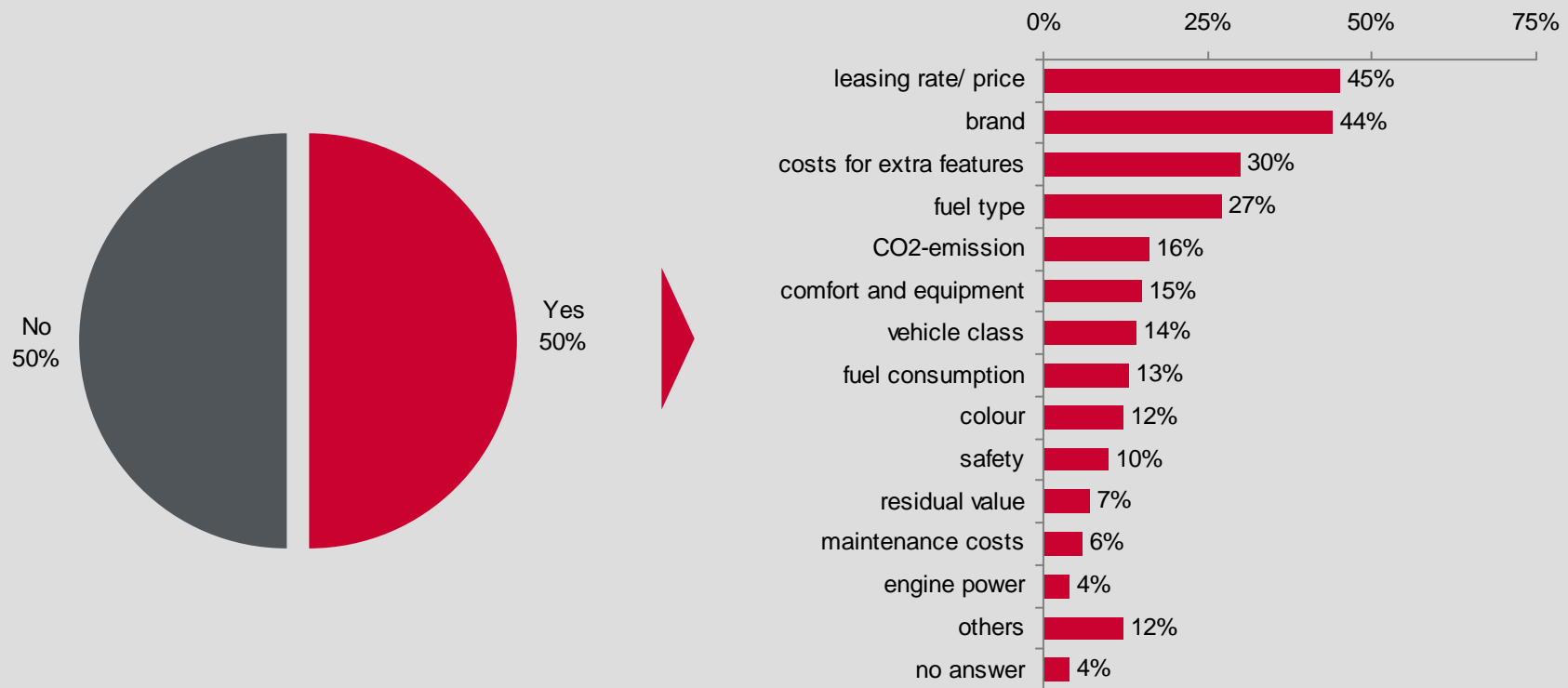


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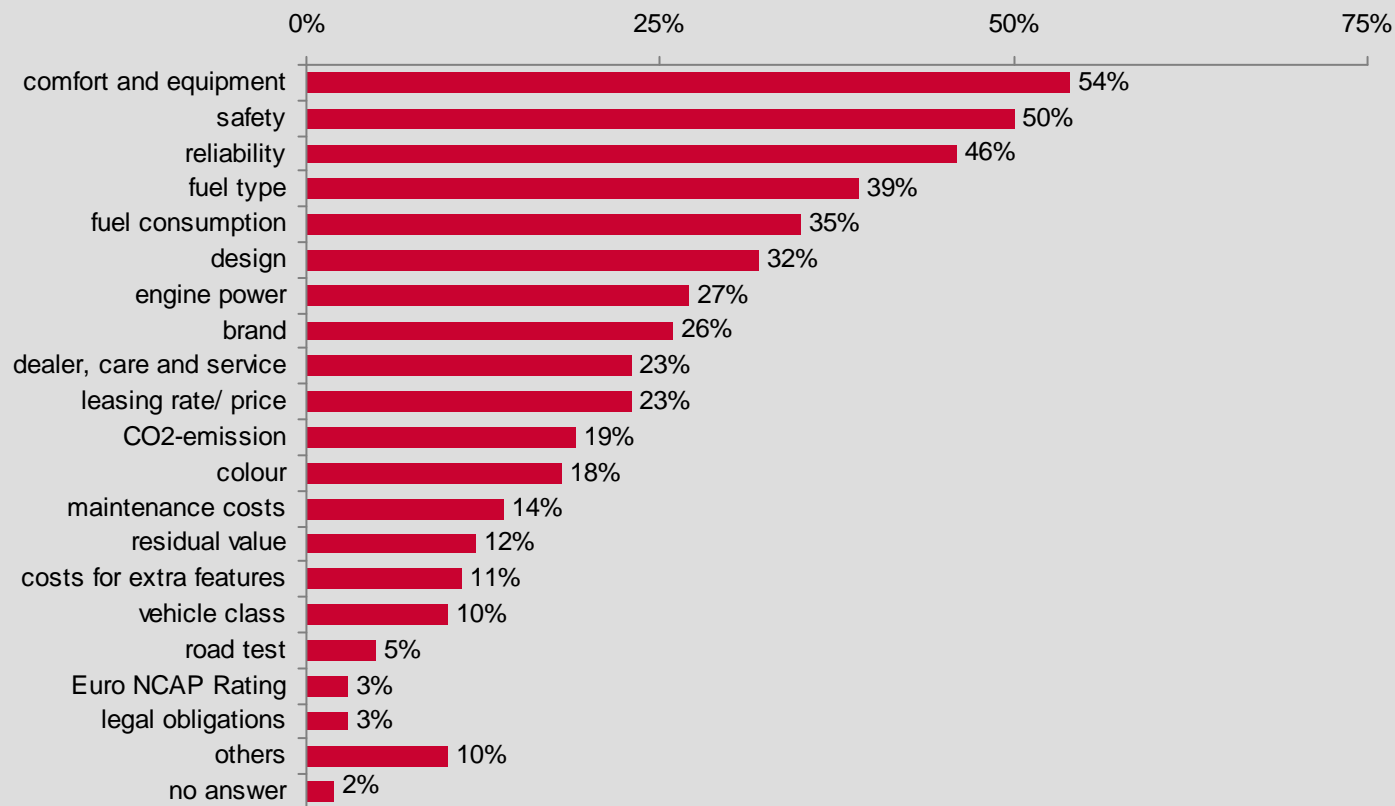


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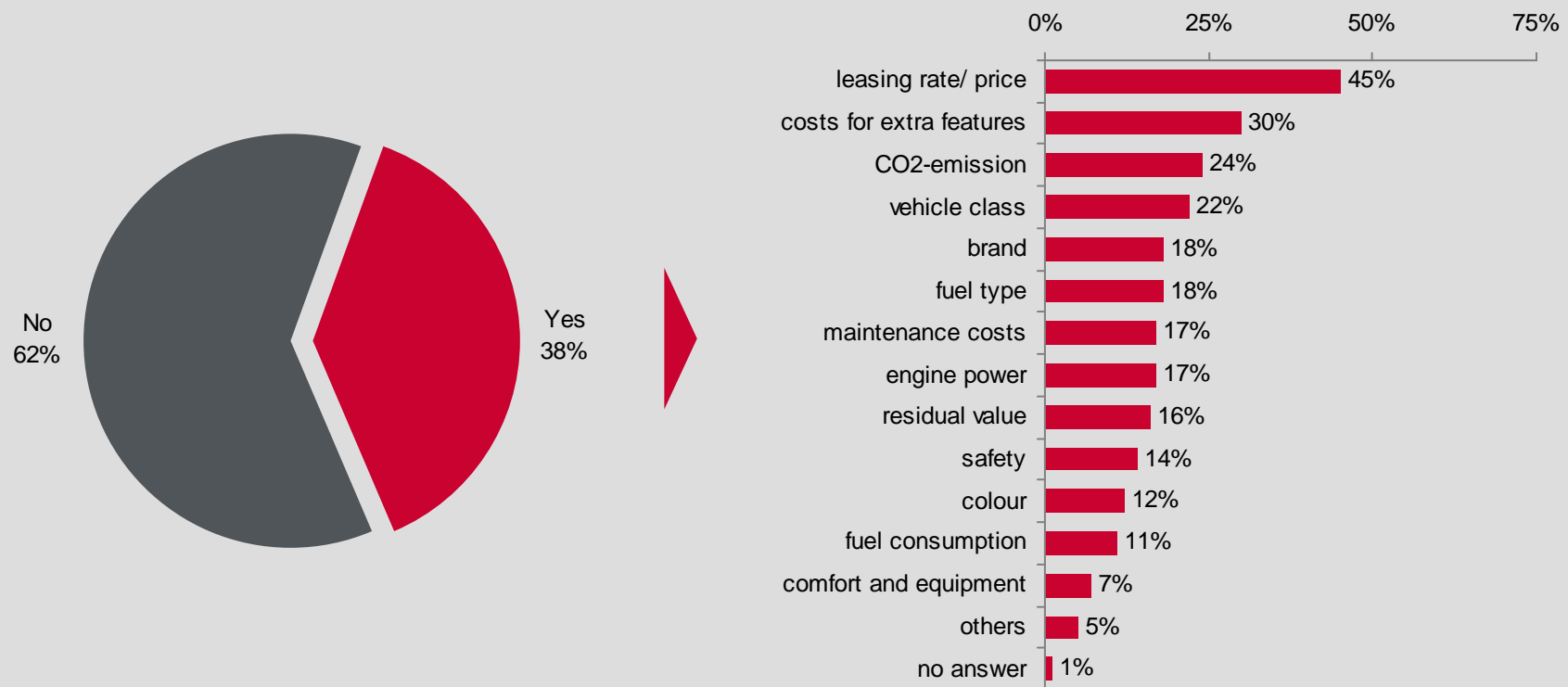


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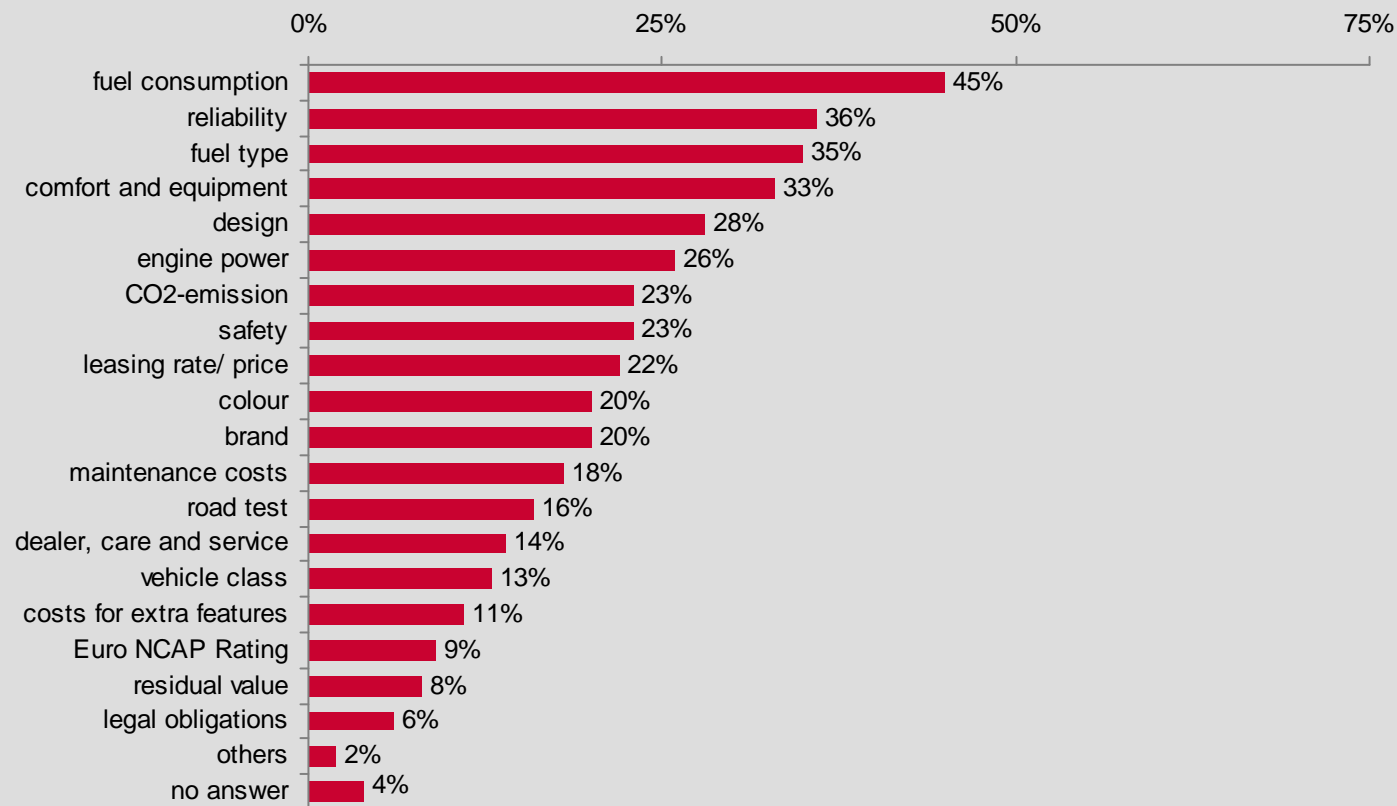


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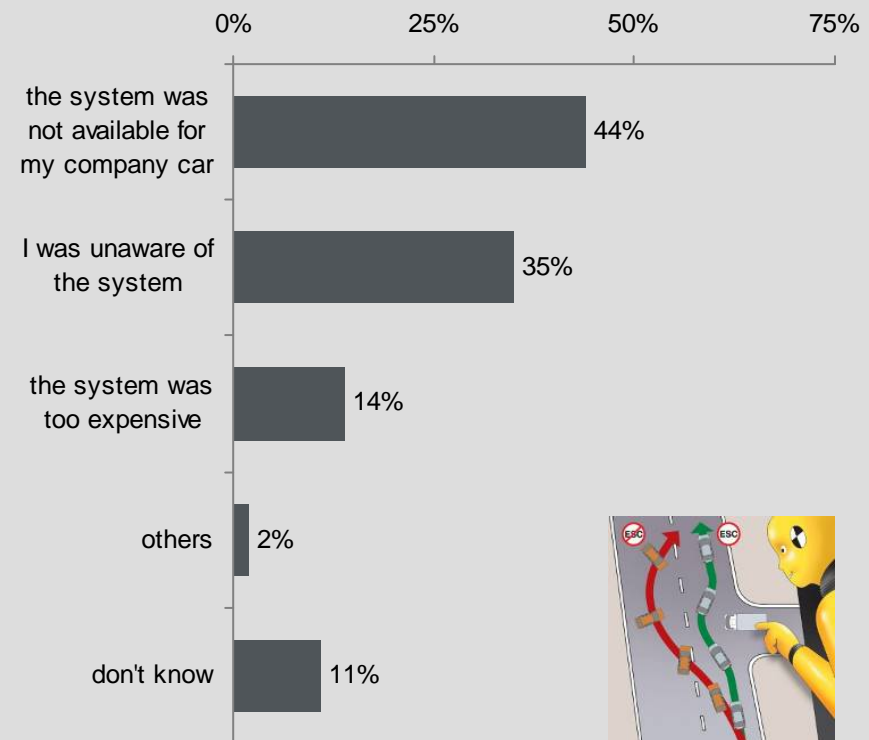
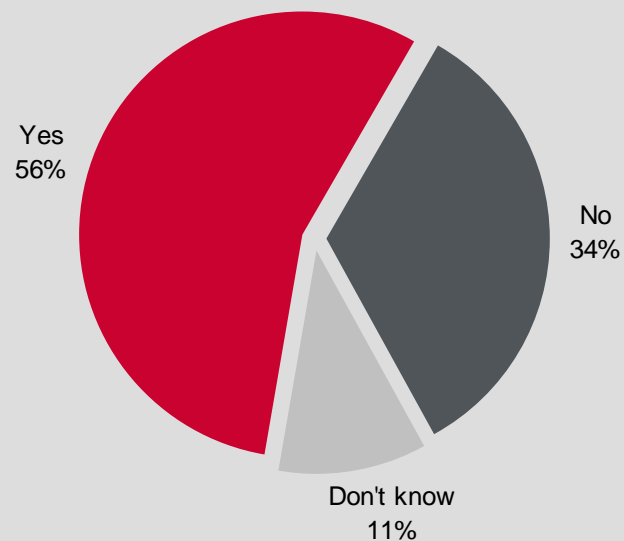
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3.3 eSafety systems in company cars

3.3.1 Electronic Stability Control

Is your present company car equipped with Electronic Stability Control?

Why is your present company car not equipped with Electronic Stability Control? (multiple answers possible; filter: only respondents with "no")

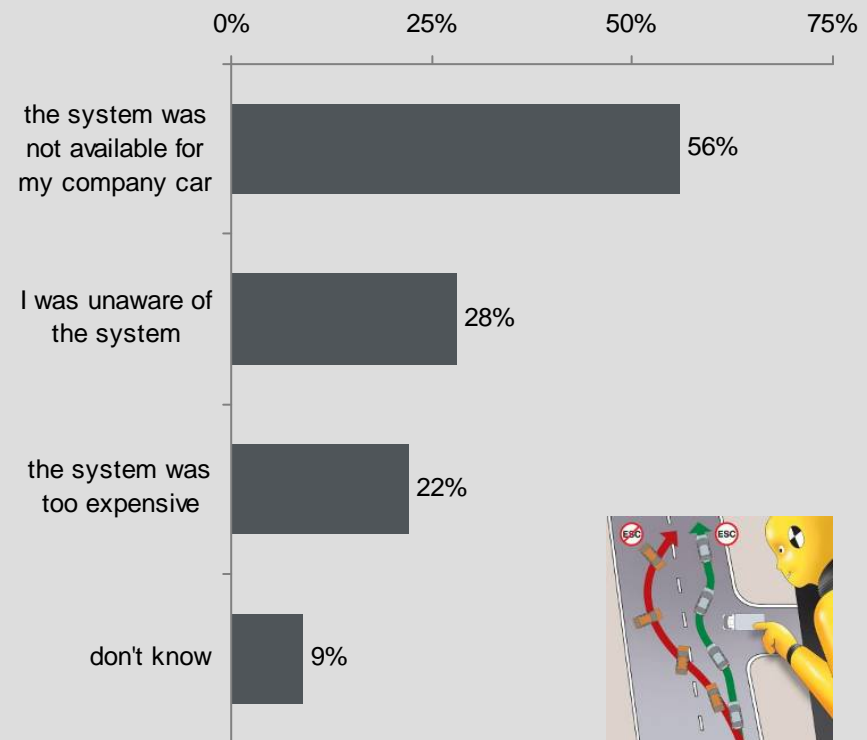
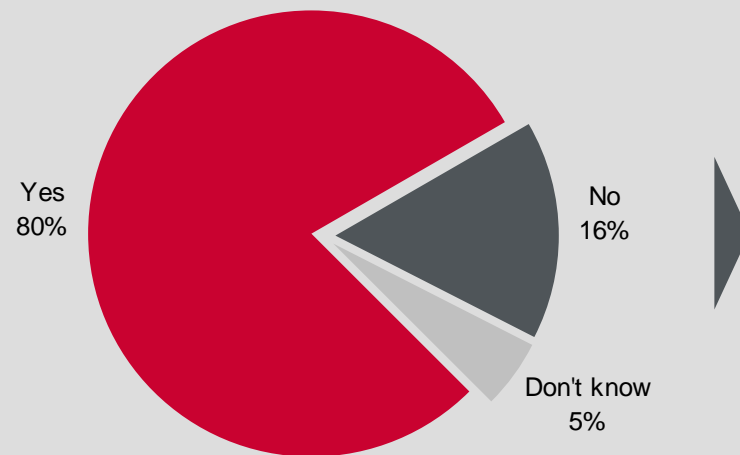


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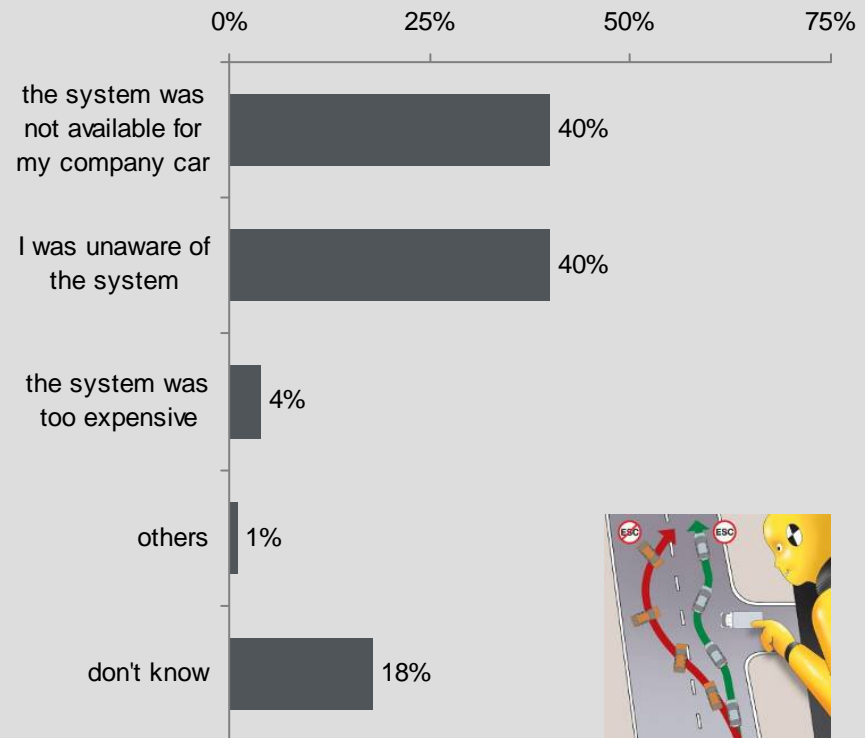
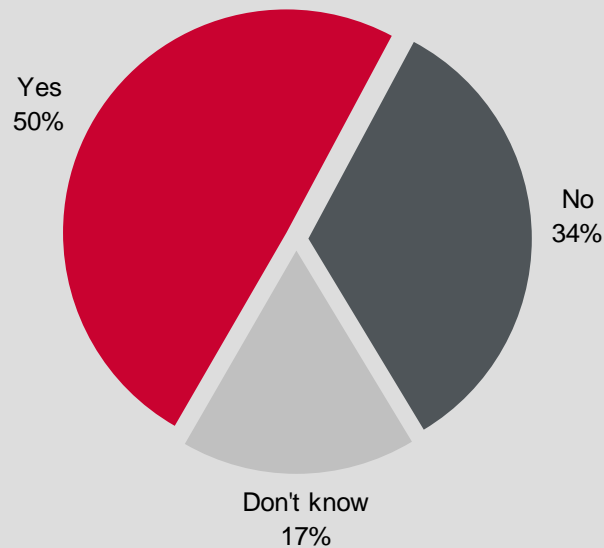
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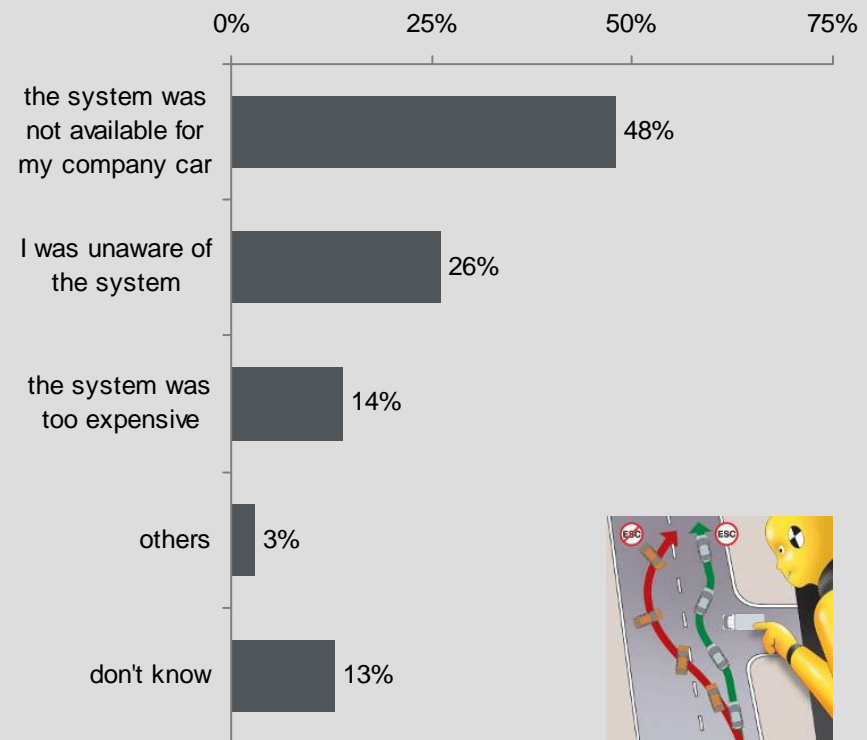
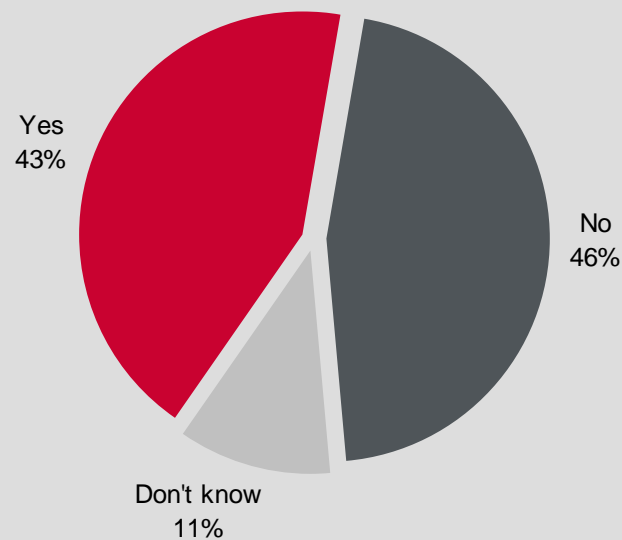


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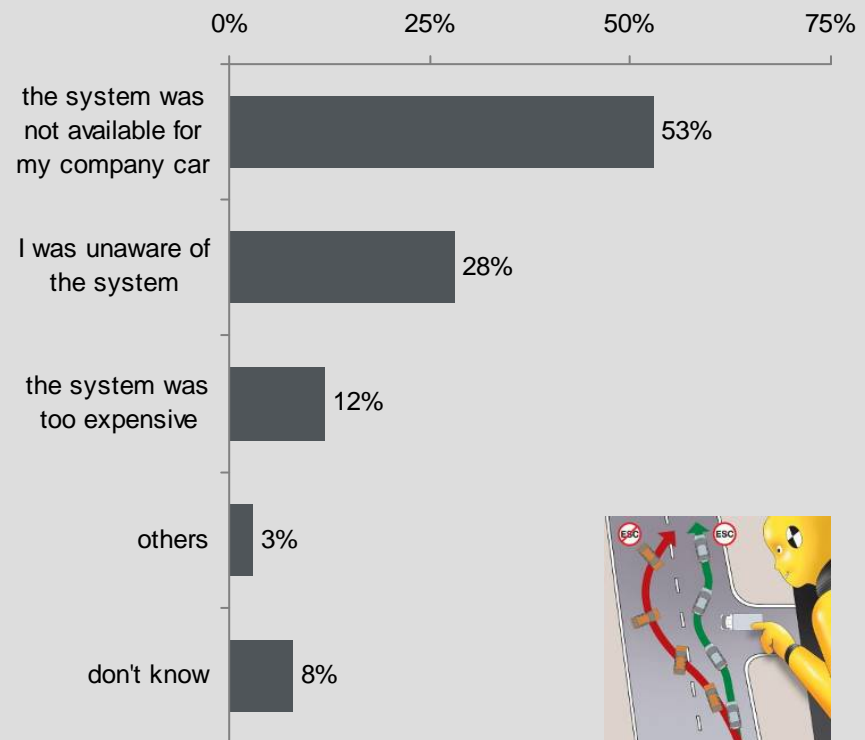
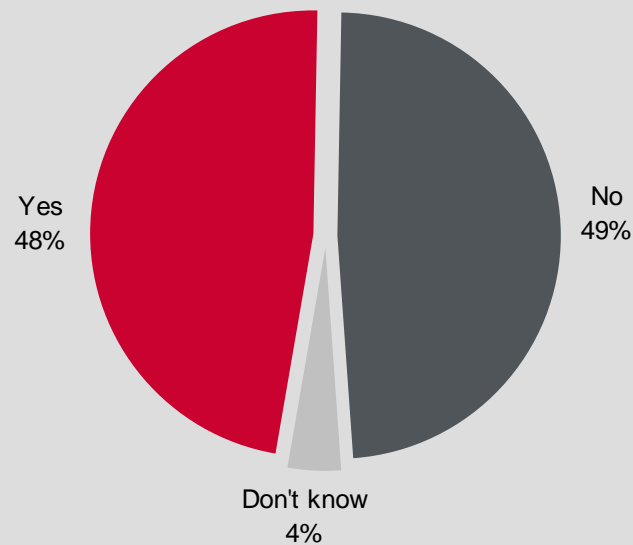


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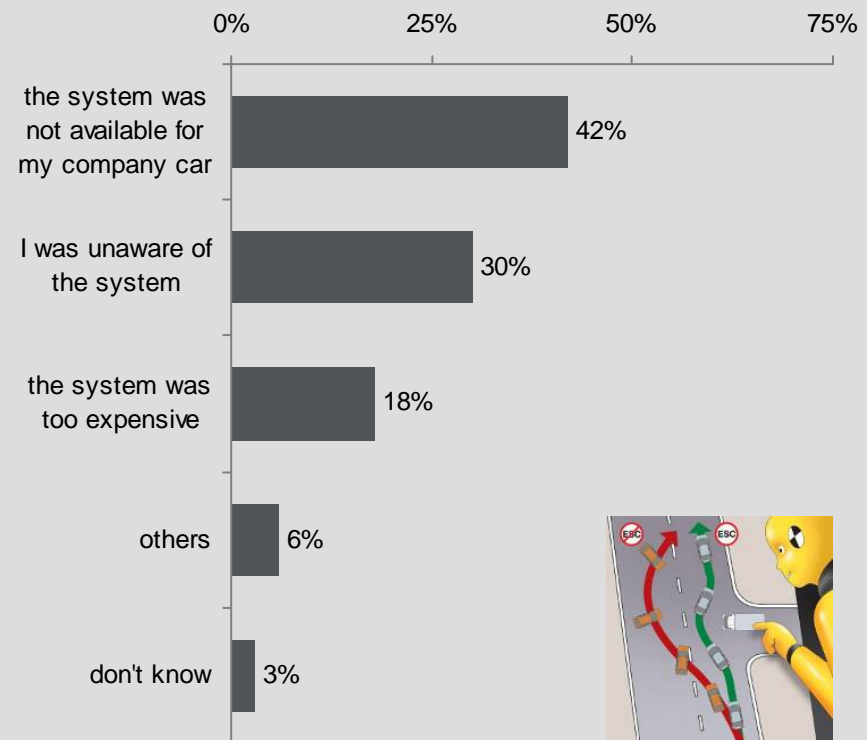
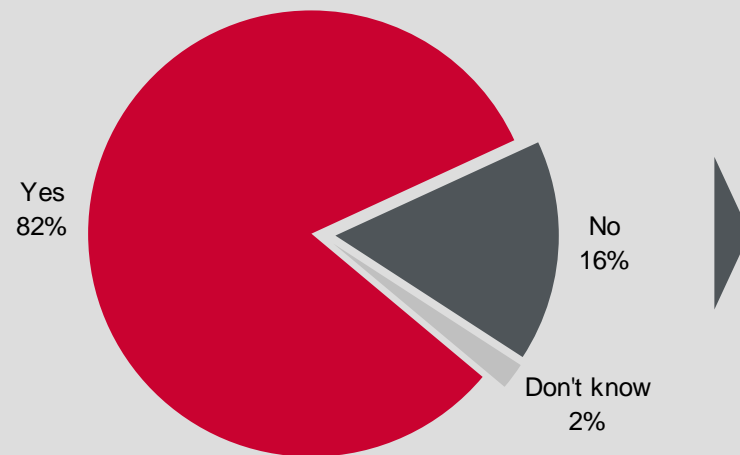
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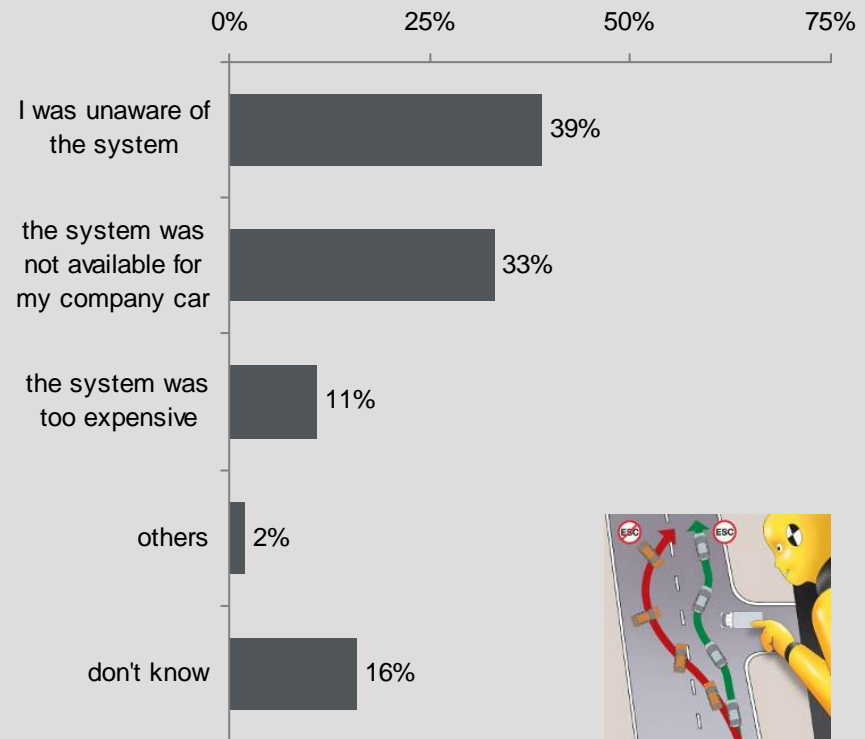
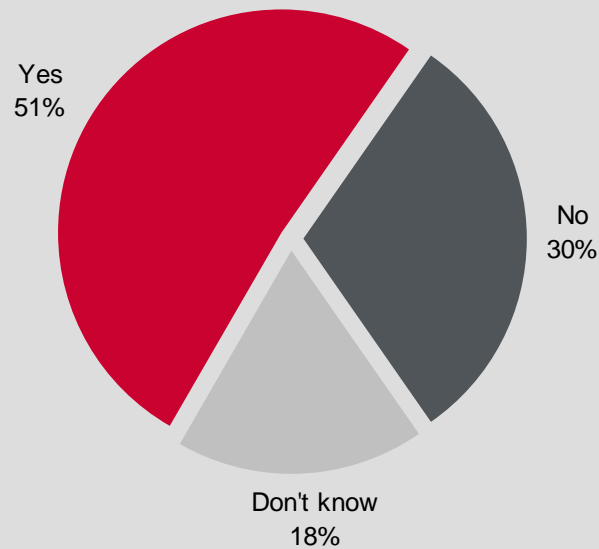


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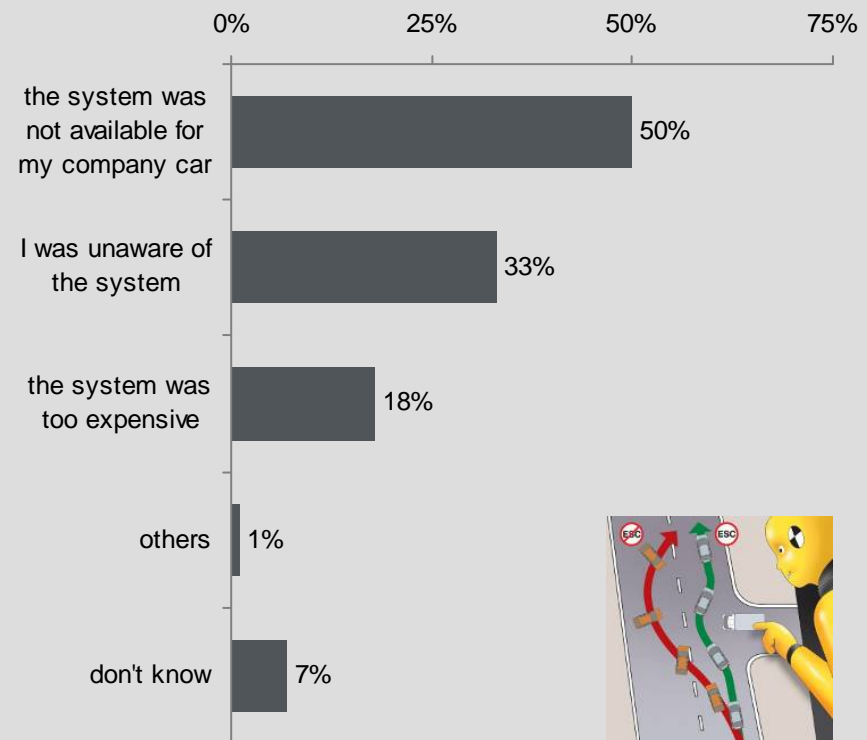
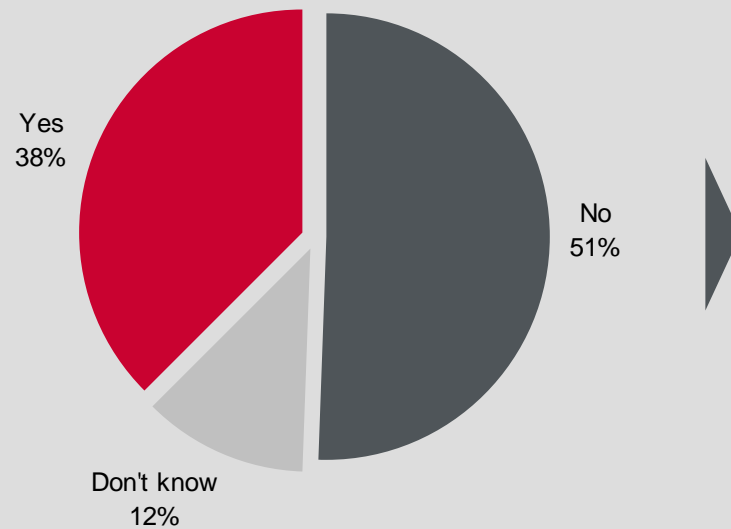


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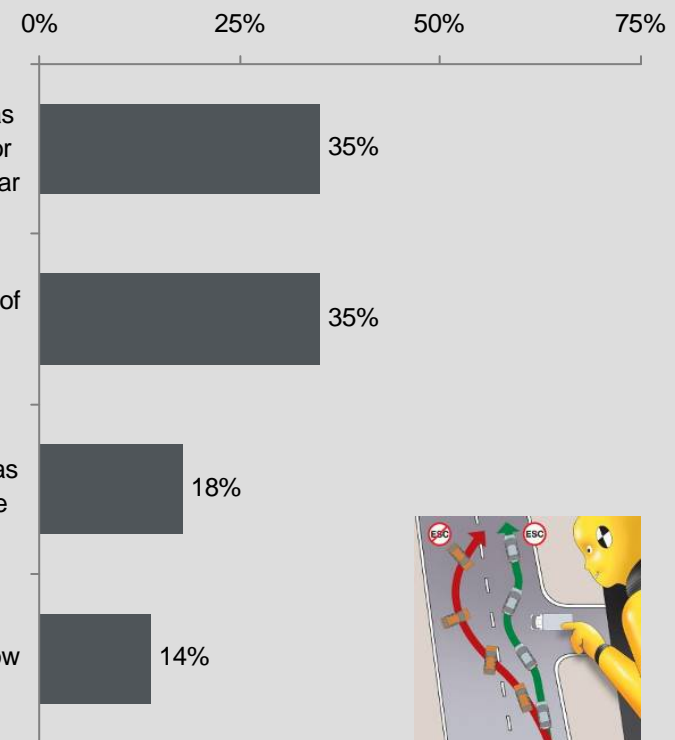
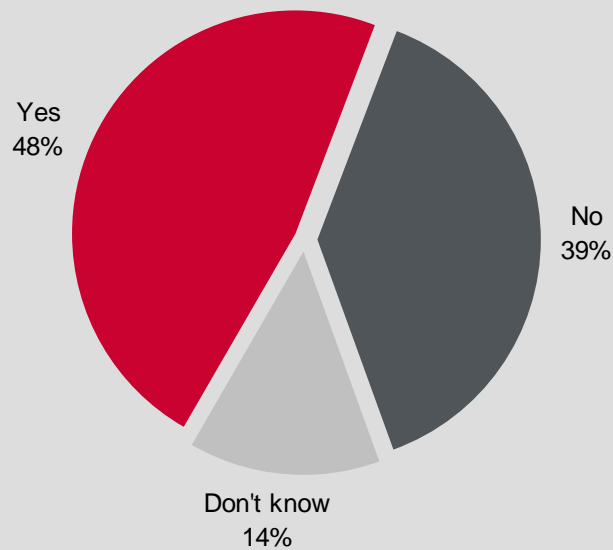
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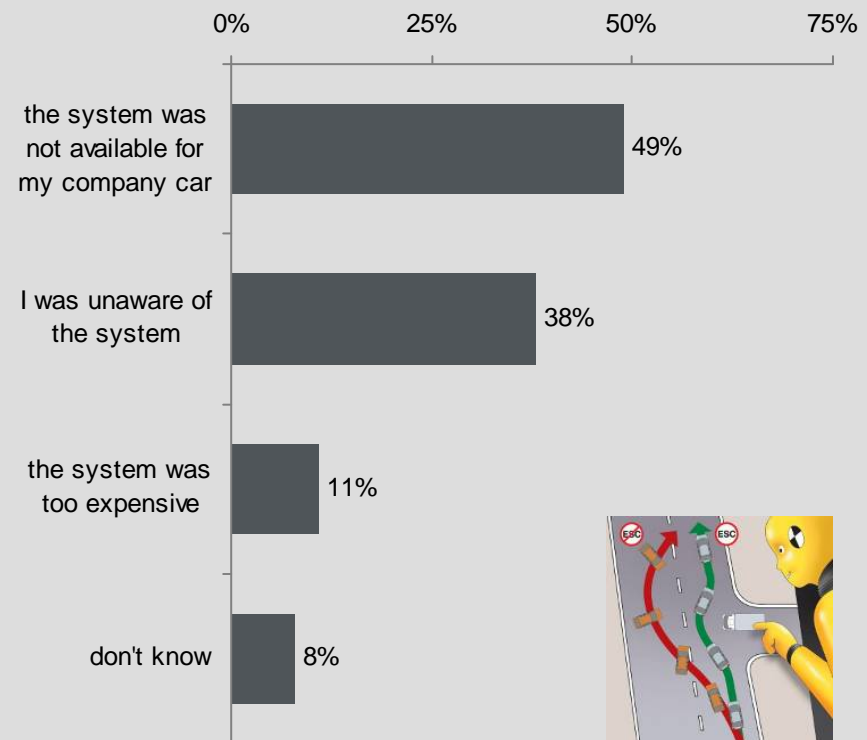
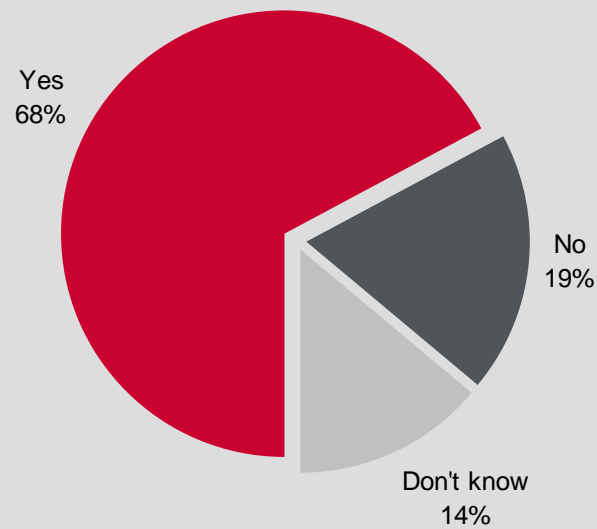
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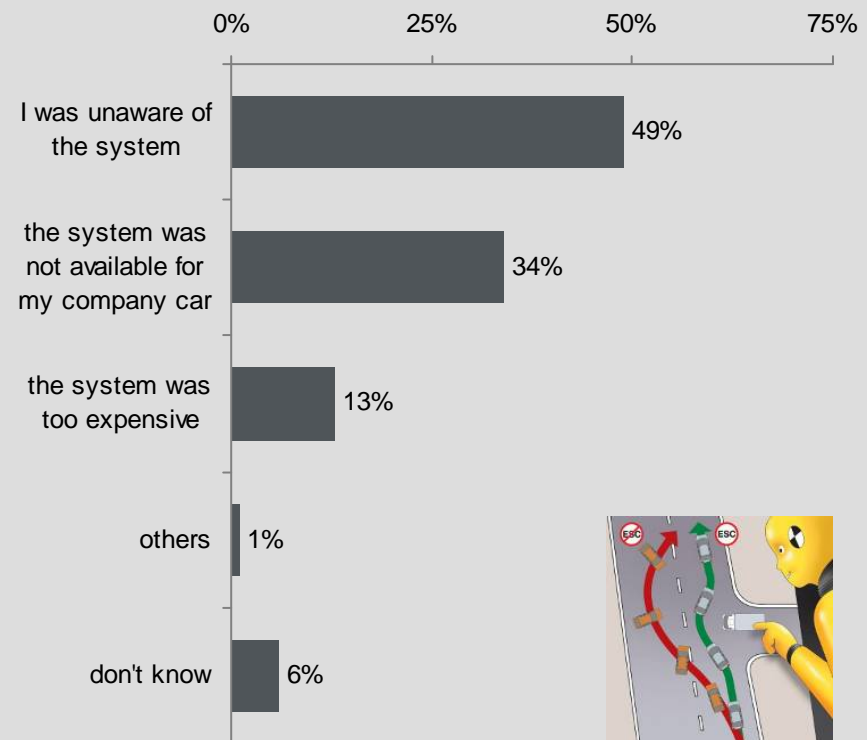
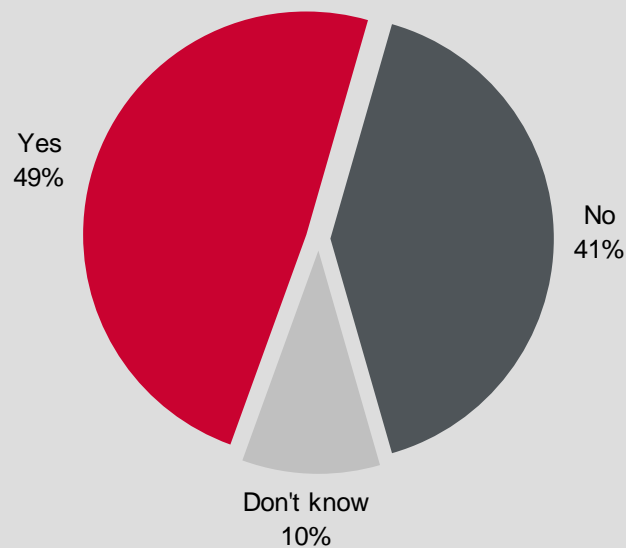
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Content

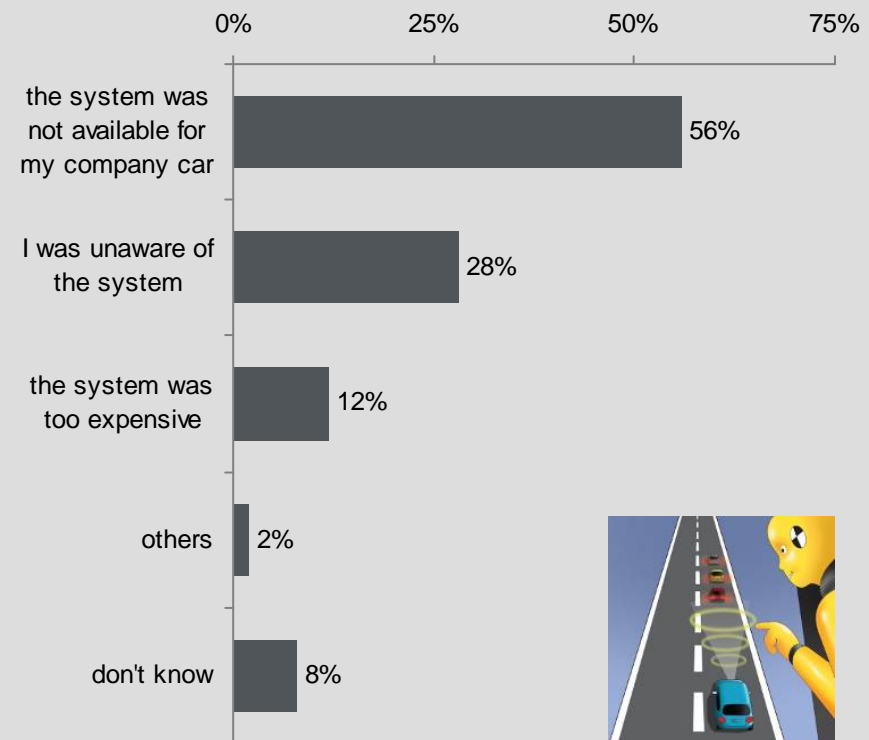
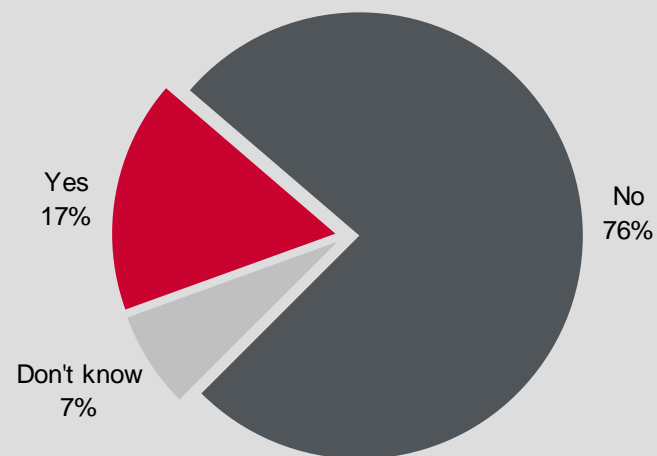
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 - 3.4 Information and responsibility

3.3 eSafety systems in company cars

3.3.2 Advanced Emergency Braking

Is your present company car equipped with Advanced Emergency Braking?

Why is your present company car not equipped with Advanced Emergency Braking? (multiple answers possible; filter: only respondents with "no")

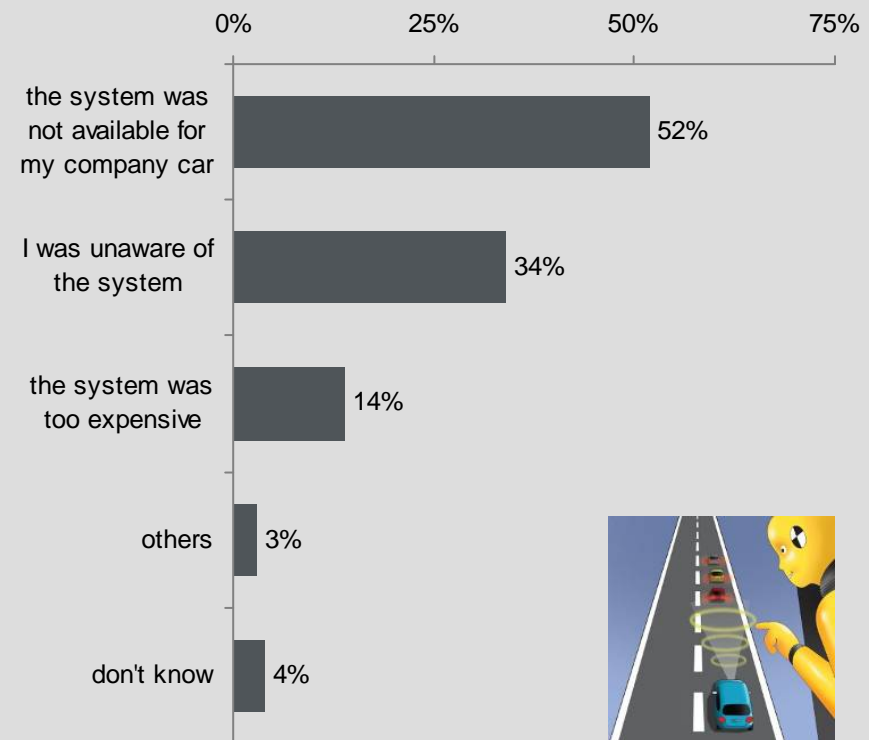
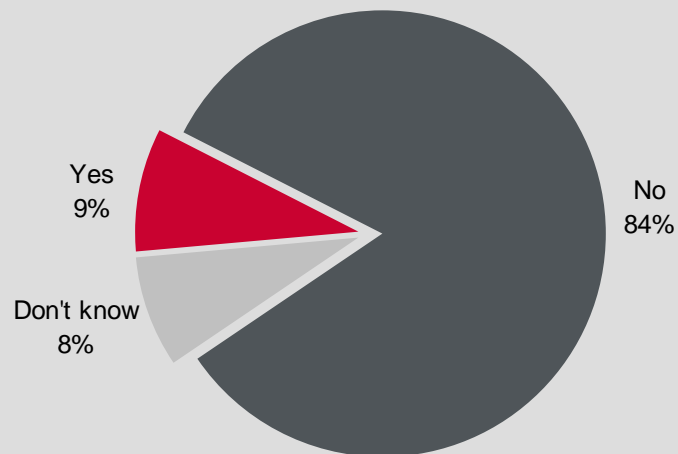


3.3 eSafety systems in company cars

3.3.2 Advanced Emergency Braking

Is your present company car equipped with Advanced Emergency Braking?

Why is your present company car not equipped with Advanced Emergency Braking? (multiple answers possible; filter: only respondents with "no")

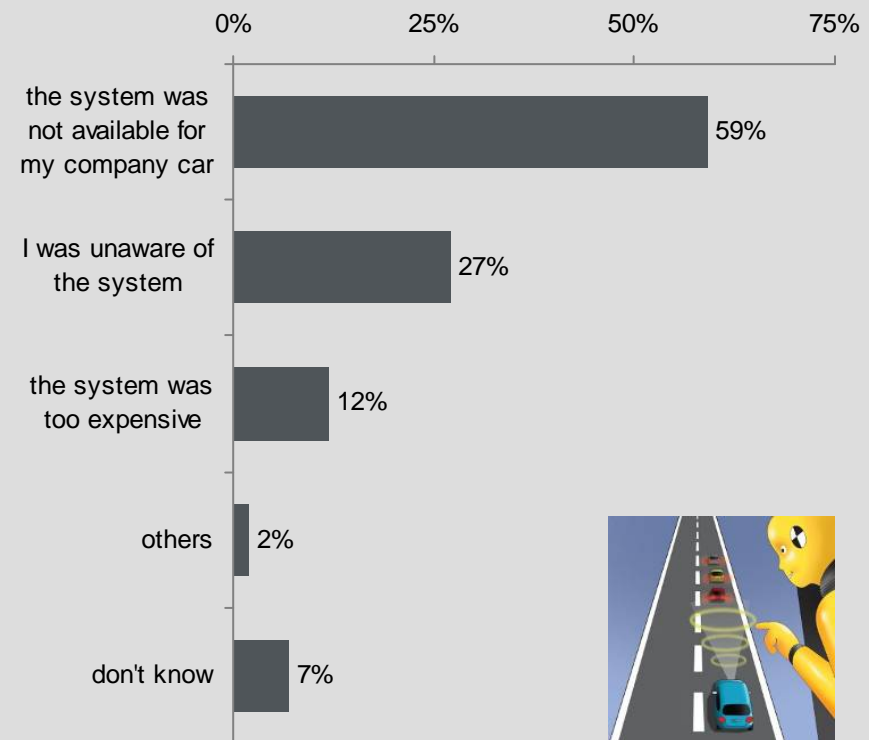
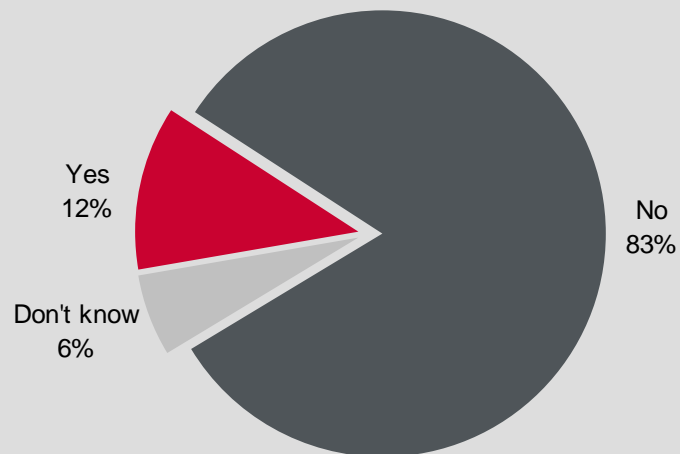


3.3 eSafety systems in company cars

3.3.2 Advanced Emergency Braking

Is your present company car equipped with Advanced Emergency Braking?

Why is your present company car not equipped with Advanced Emergency Braking? (multiple answers possible; filter: only respondents with "no")

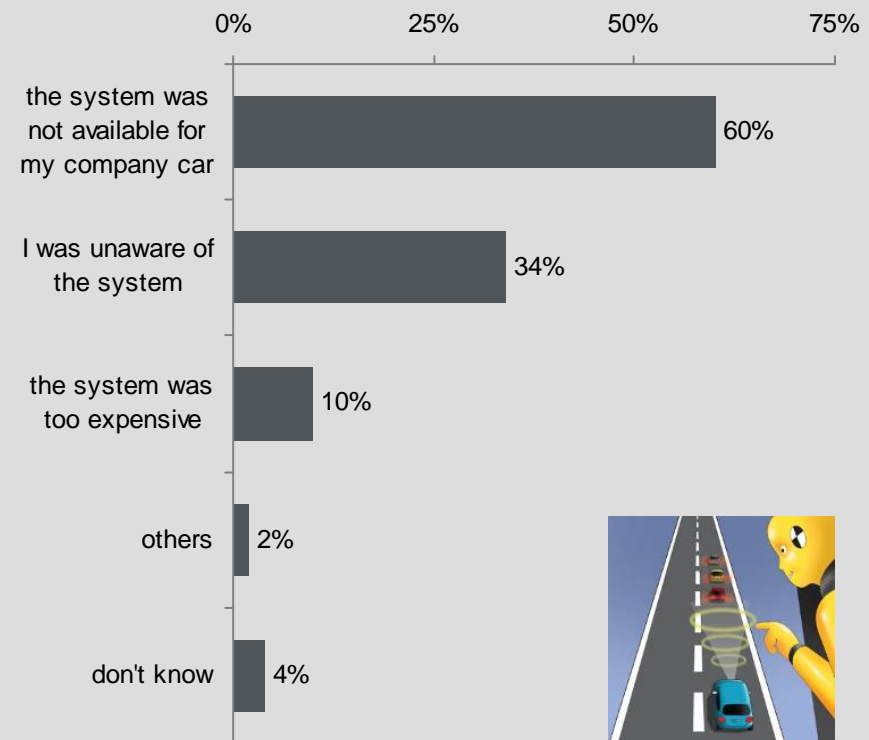
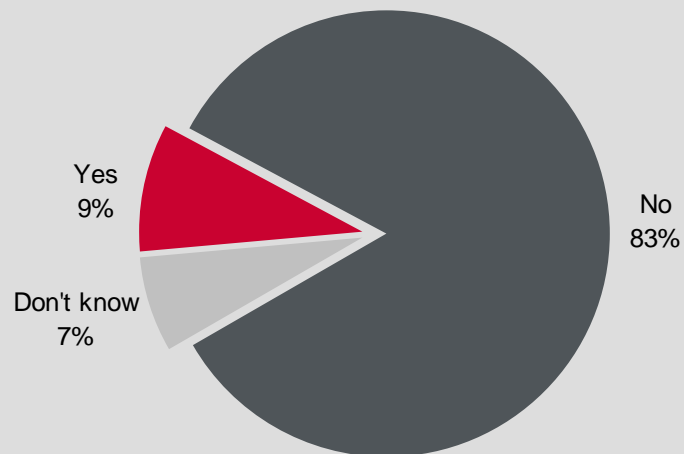


3.3 eSafety systems in company cars

3.3.2 Advanced Emergency Braking

Is your present company car equipped with Advanced Emergency Braking?

Why is your present company car not equipped with Advanced Emergency Braking? (multiple answers possible; filter: only respondents with "no")

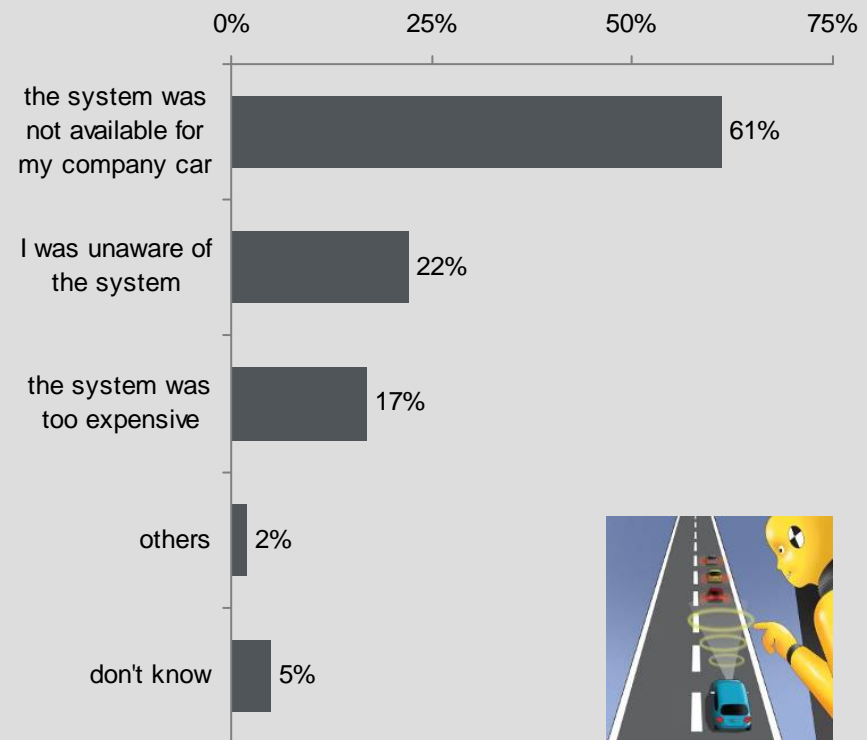
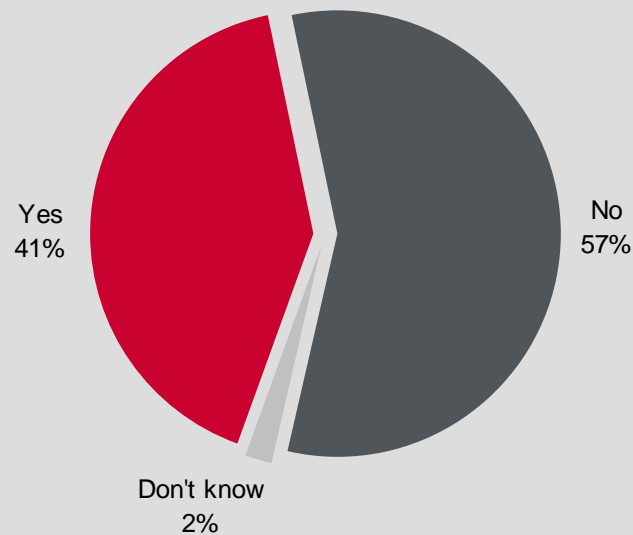


3.3 eSafety systems in company cars

3.3.2 Advanced Emergency Braking

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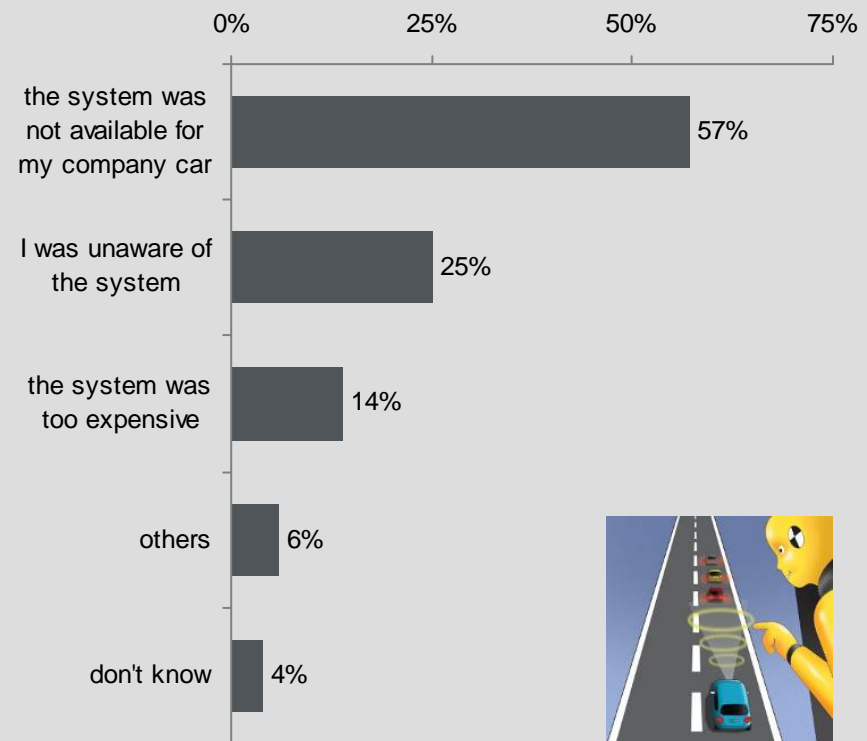
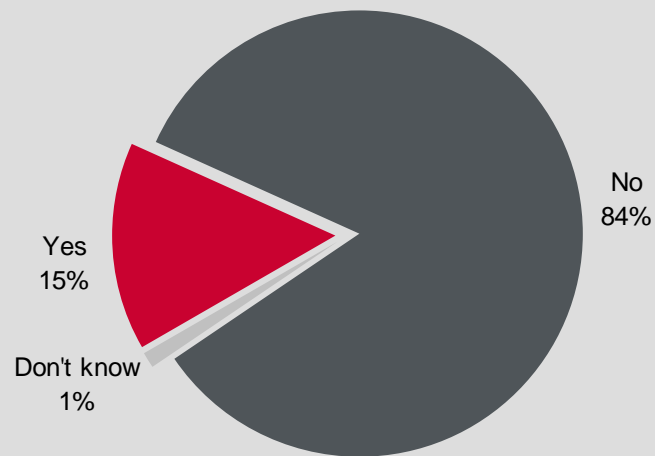
3.3 eSafety systems in company cars

3.3.2 Advanced Emergency Braking



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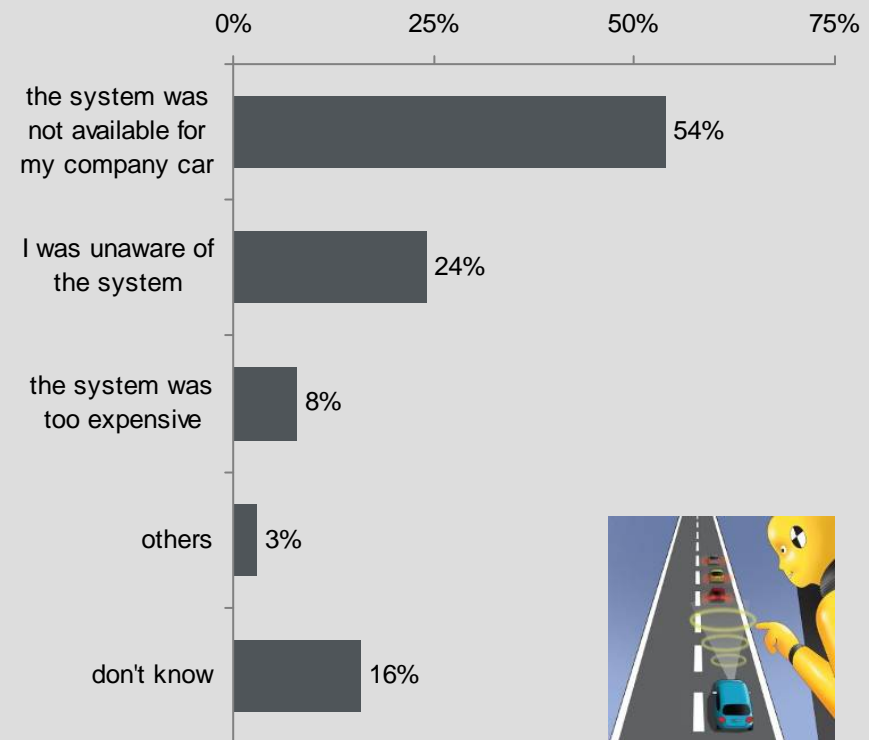
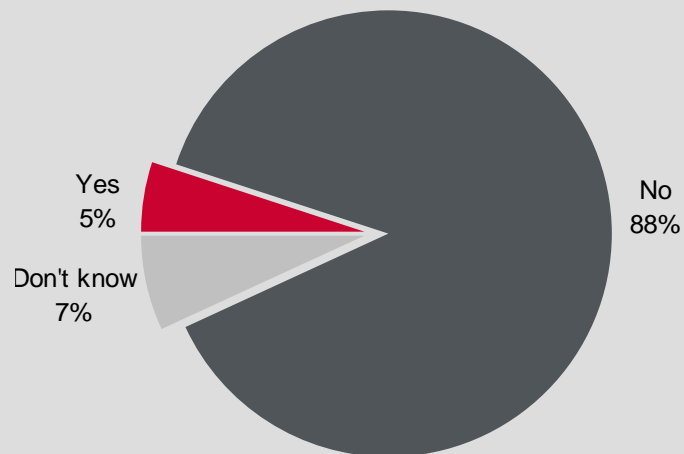


3.3 eSafety systems in company cars

3.3.2 Advanced Emergency Braking

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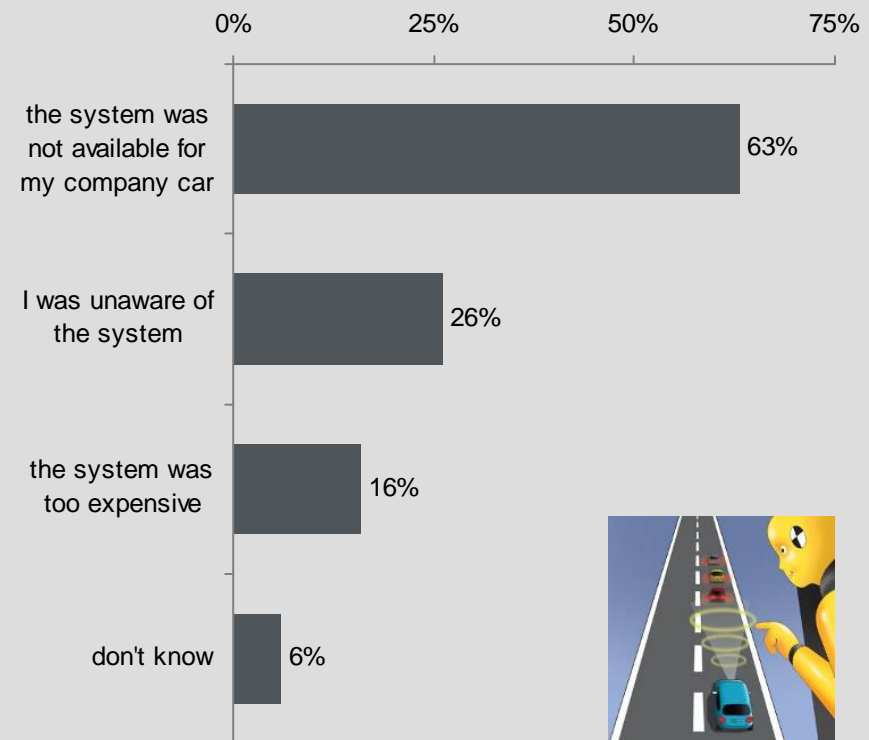
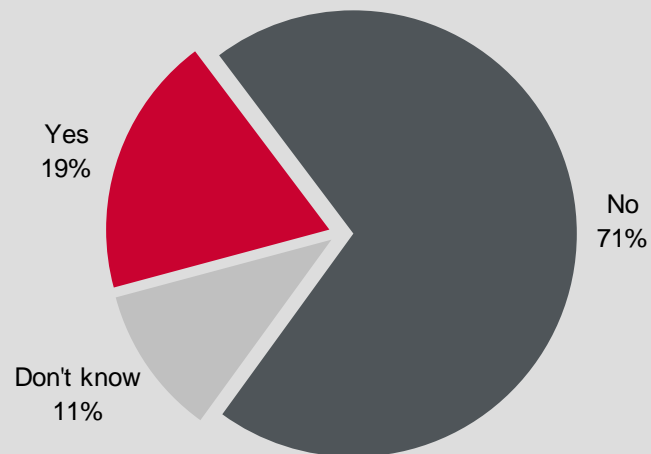


3.3 eSafety systems in company cars

3.3.2 Advanced Emergency Braking

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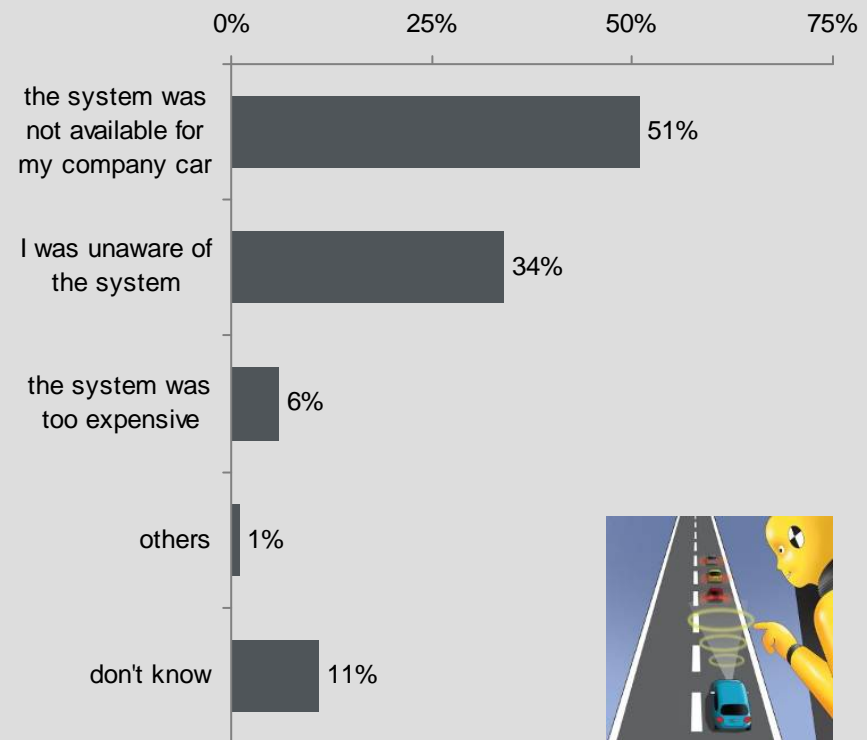
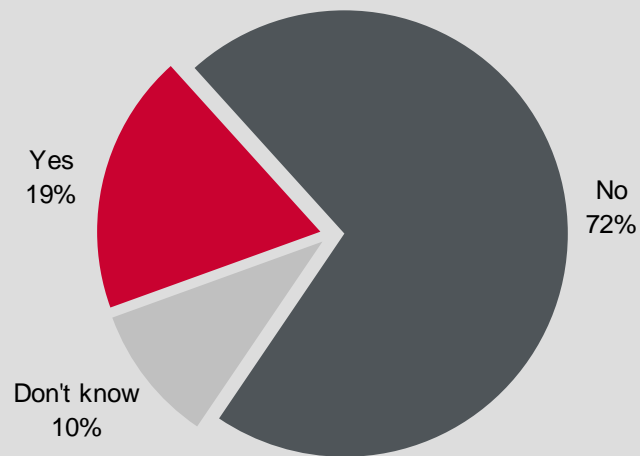
3.3 eSafety systems in company cars

3.3.2 Advanced Emergency Braking



Is your present company car equipped with Advanced Emergency Braking?

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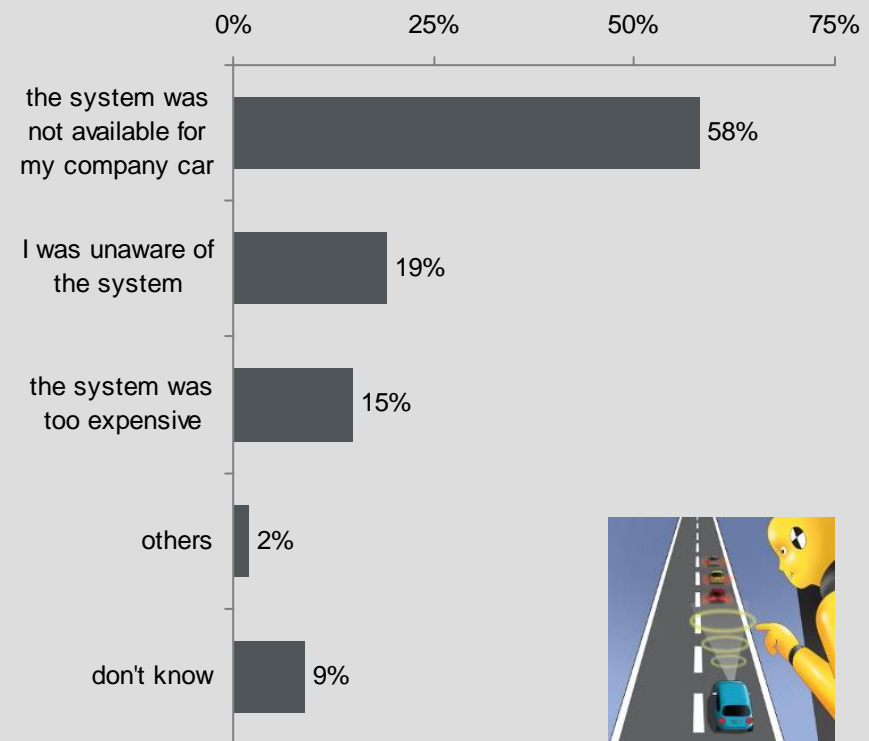
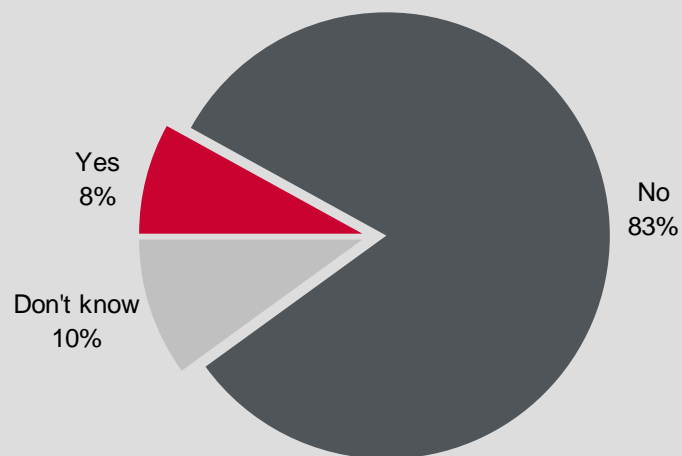
3.3 eSafety systems in company cars

3.3.2 Advanced Emergency Braking



Is your present company car equipped with Advanced Emergency Braking?

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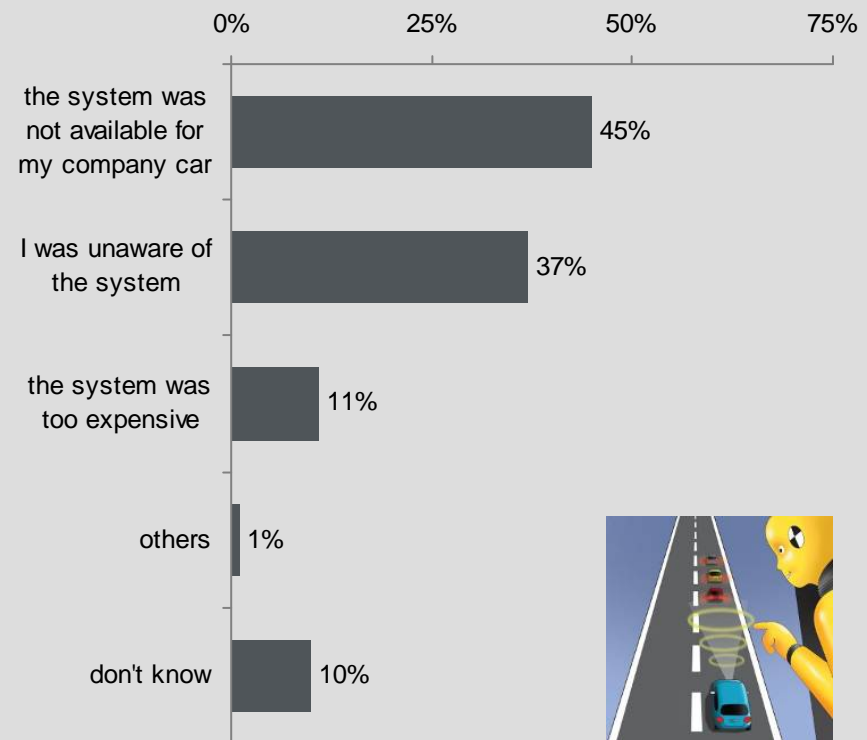
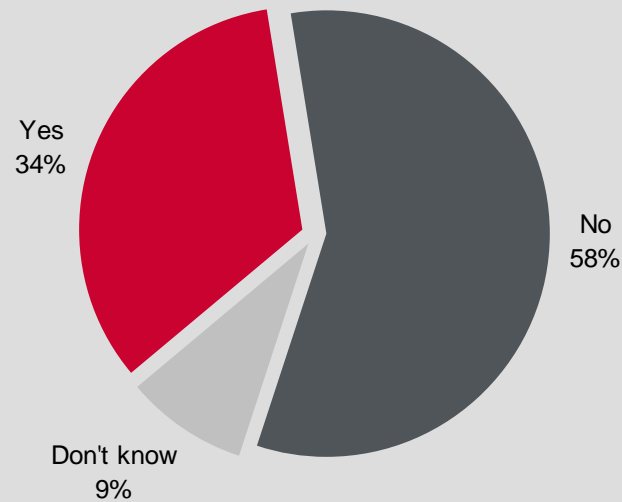
3.3 eSafety systems in company cars

3.3.2 Advanced Emergency Braking



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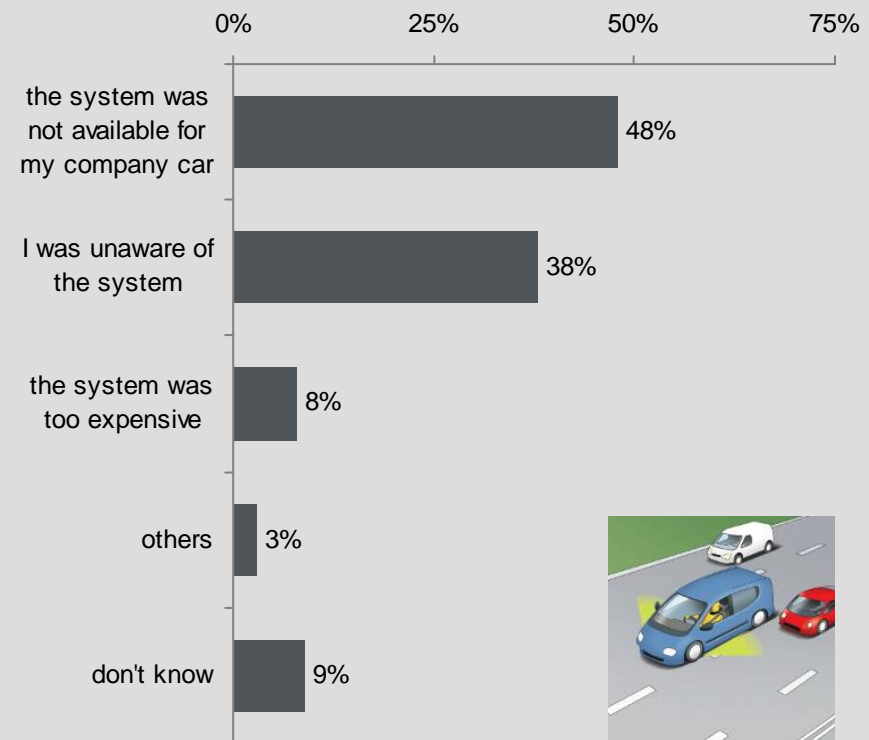
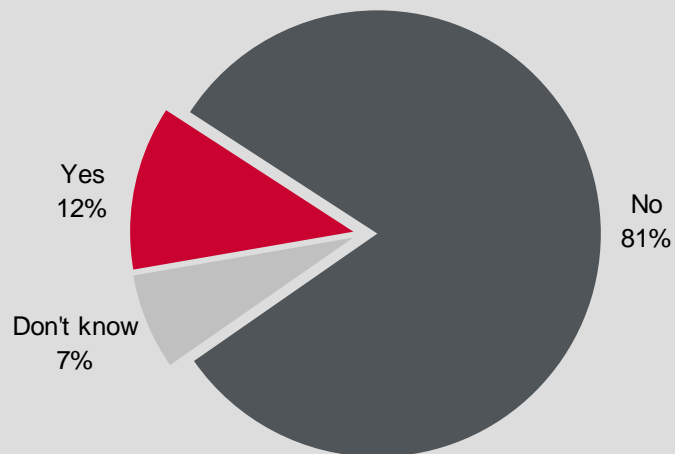
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3.3 eSafety systems in company cars

3.3.3 Blind Spot Monitoring

Is your present company car equipped with Blind Spot Monitoring?

Why is your present company car not equipped with Blind Spot Monitoring? (multiple answers possible; filter: only respondents with "no")

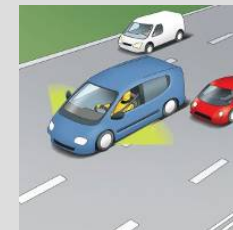
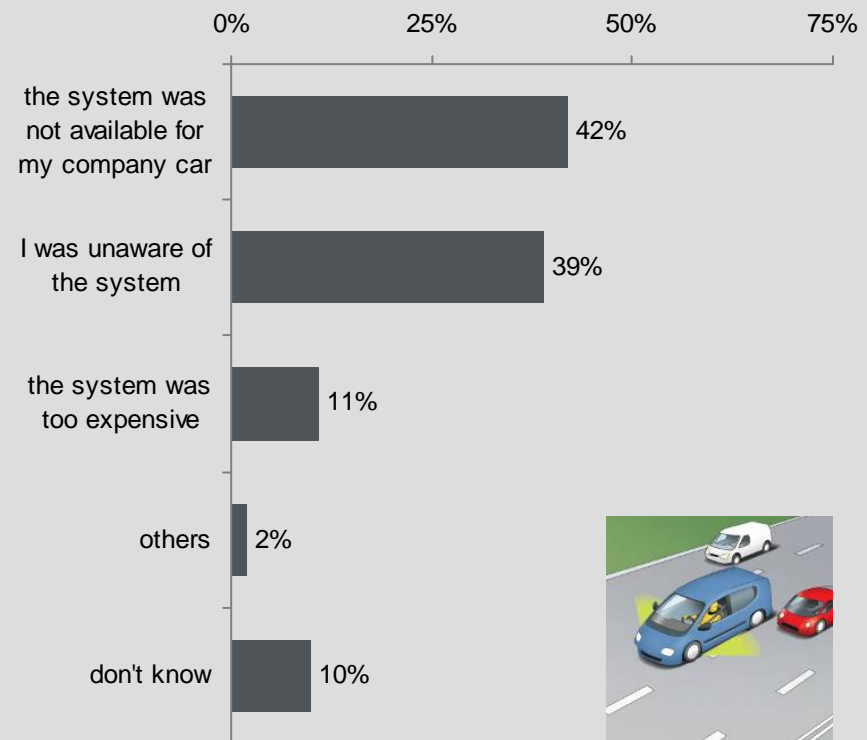
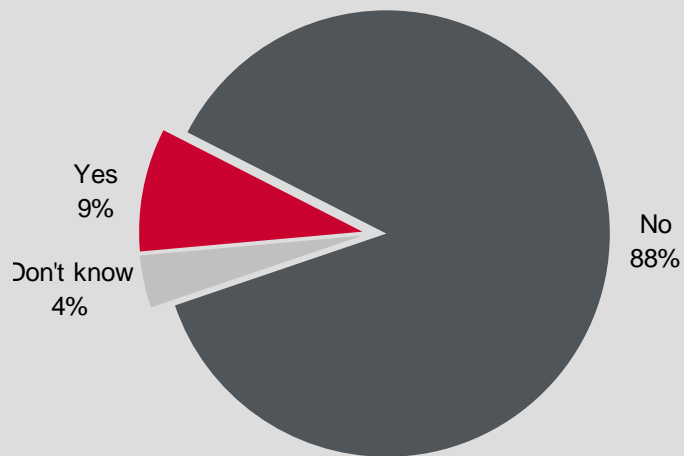


3.3 eSafety systems in company cars

3.3.3 Blind Spot Monitoring

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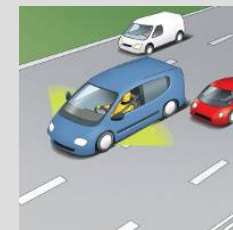
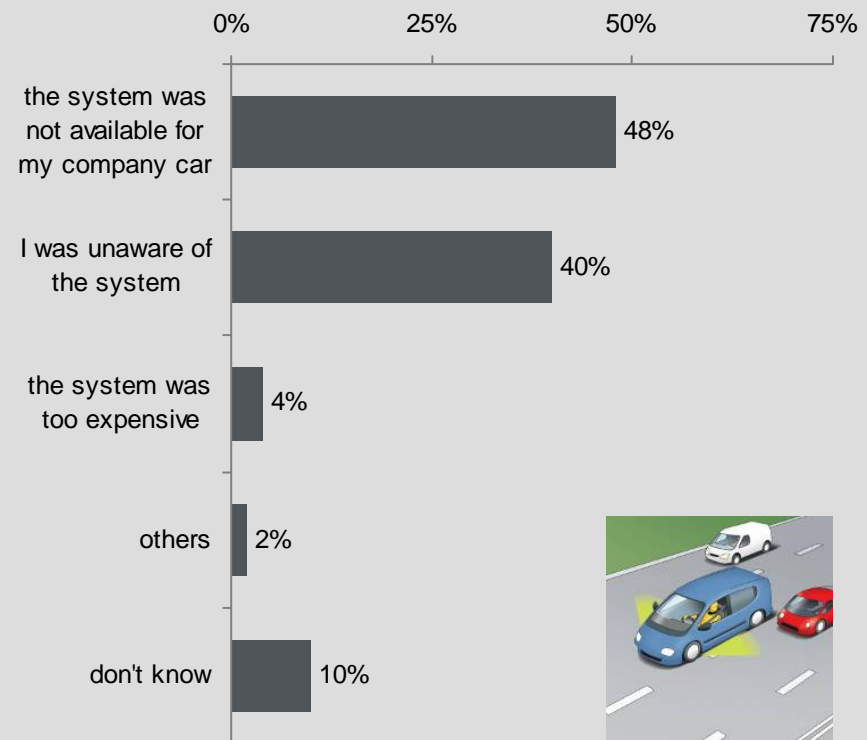
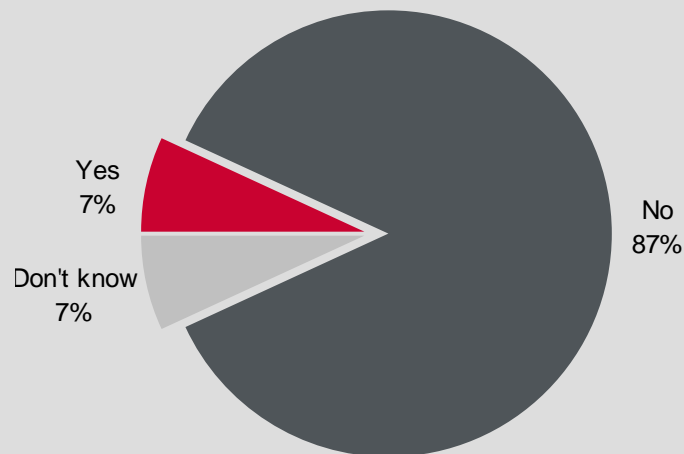
3.3 eSafety systems in company cars

3.3.3 Blind Spot Monitoring



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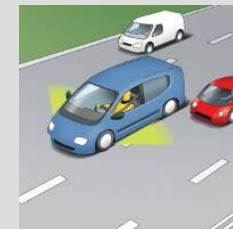
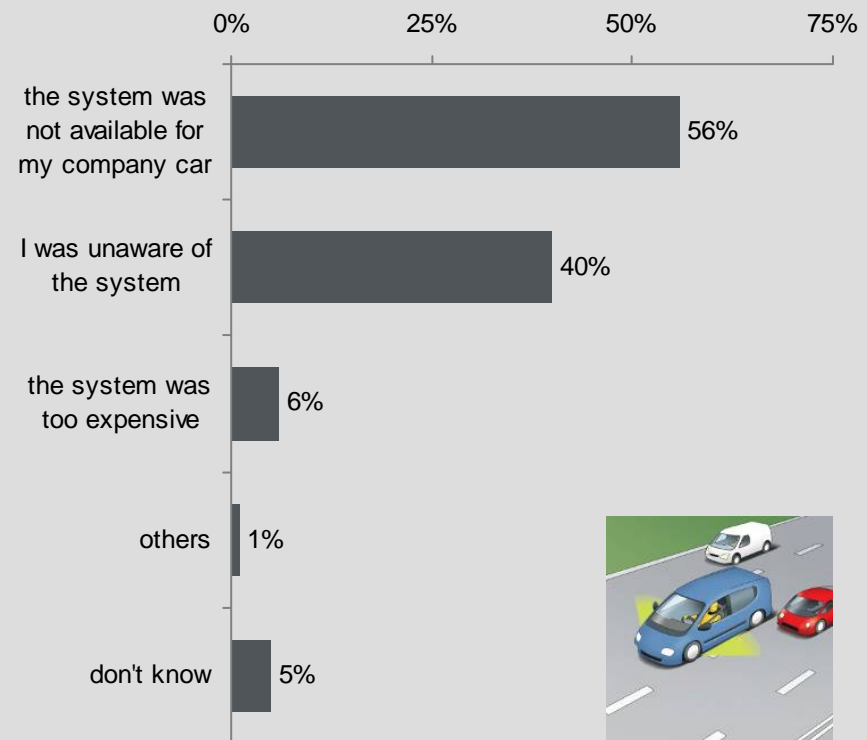
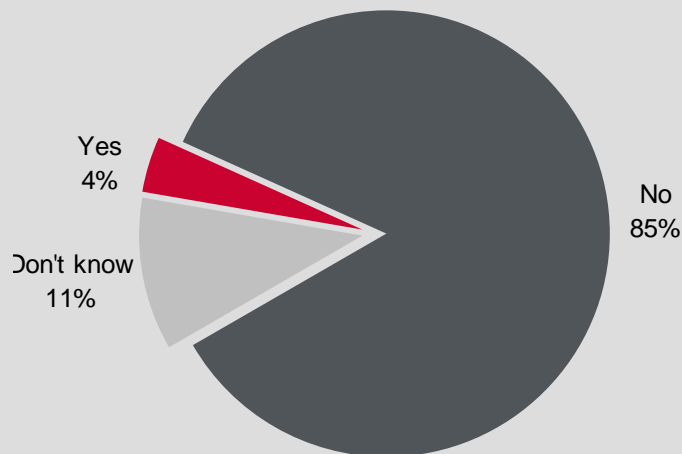


3.3 eSafety systems in company cars

3.3.3 Blind Spot Monitoring

Is your present company car equipped with Blind Spot Monitoring?

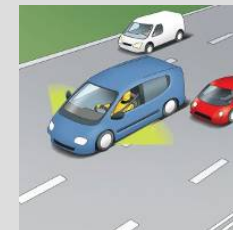
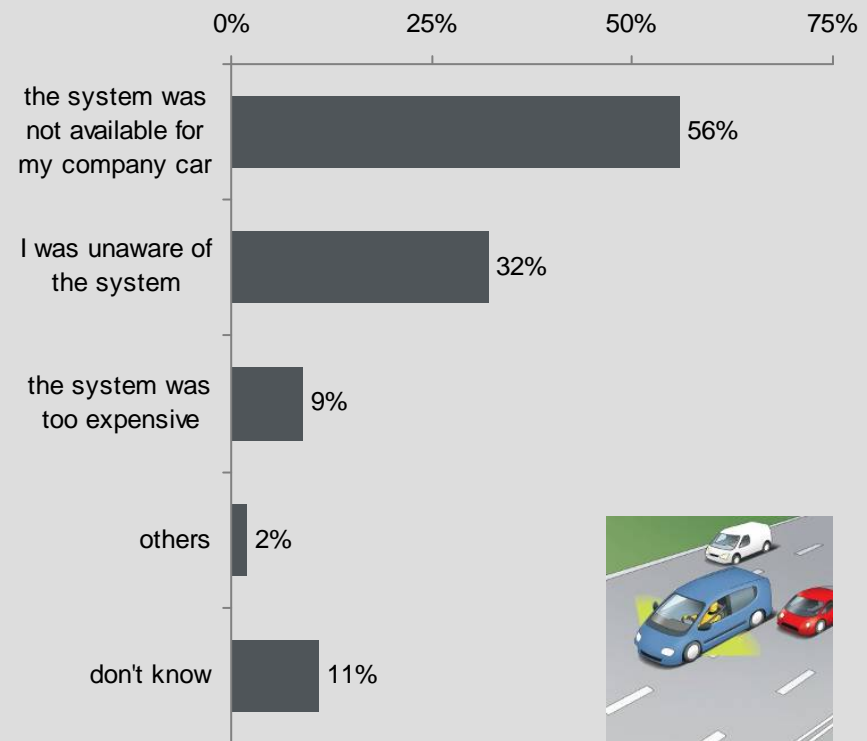
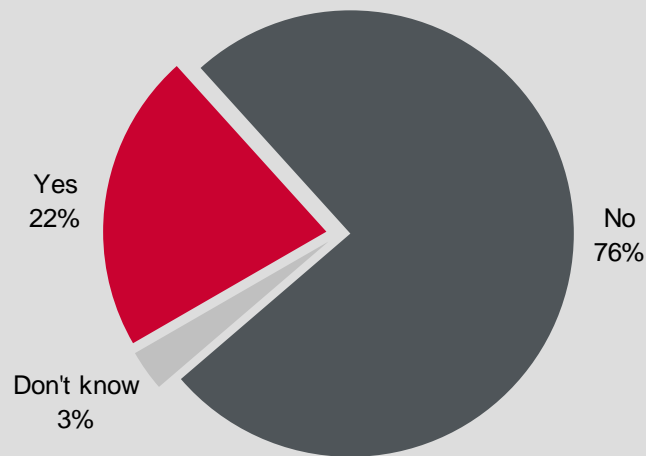
Why is your present company car not equipped with Blind Spot Monitoring? (multiple answers possible; filter: only respondents with "no")



3.3 eSafety systems in company cars

3.3.3 Blind Spot Monitoring

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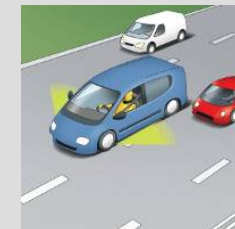
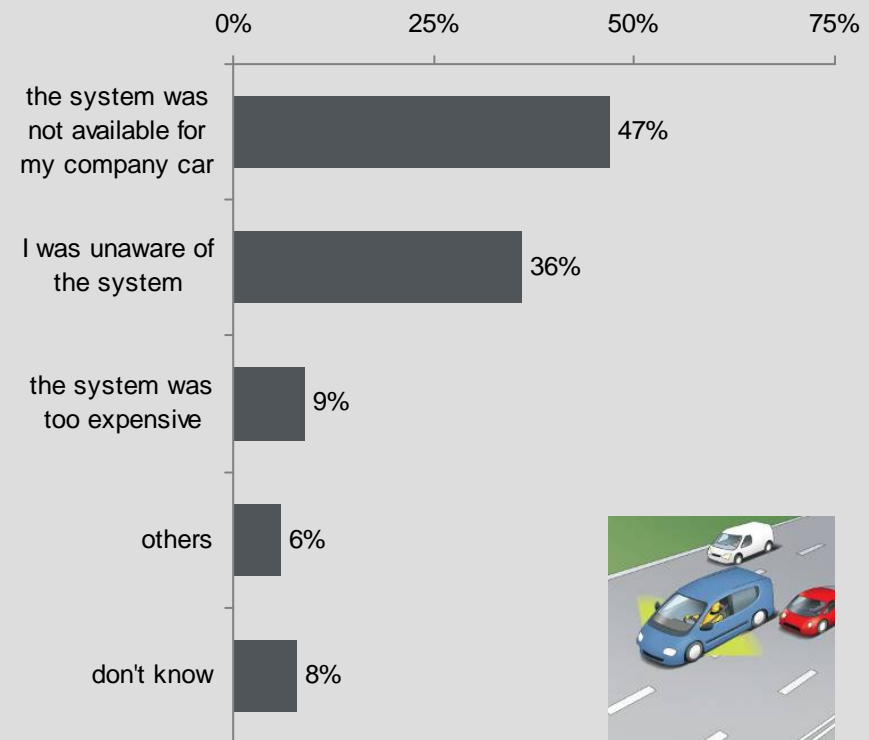
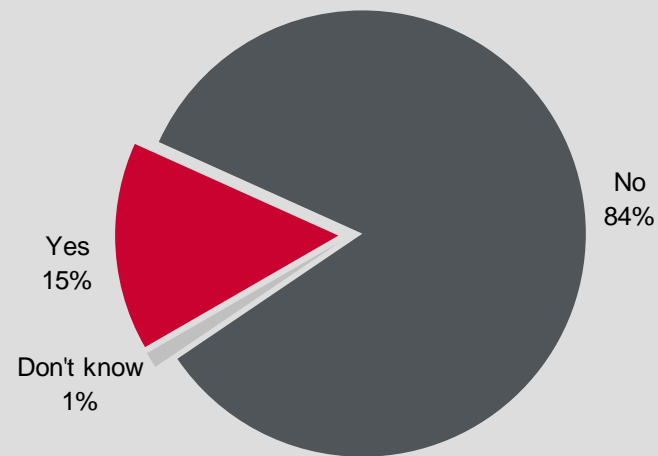
3.3 eSafety systems in company cars

3.3.3 Blind Spot Monitoring



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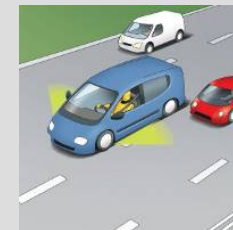
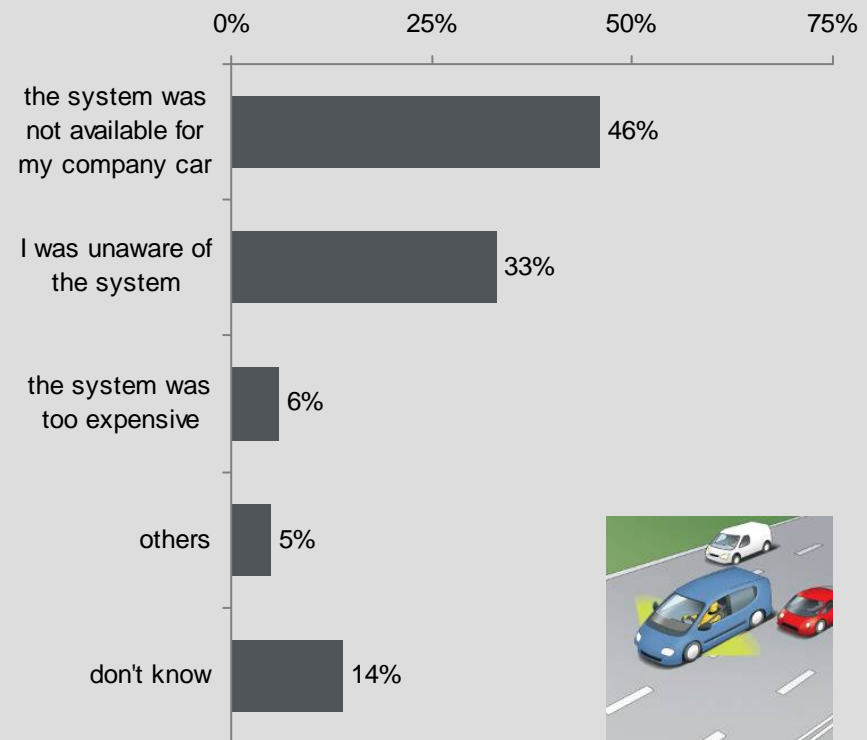
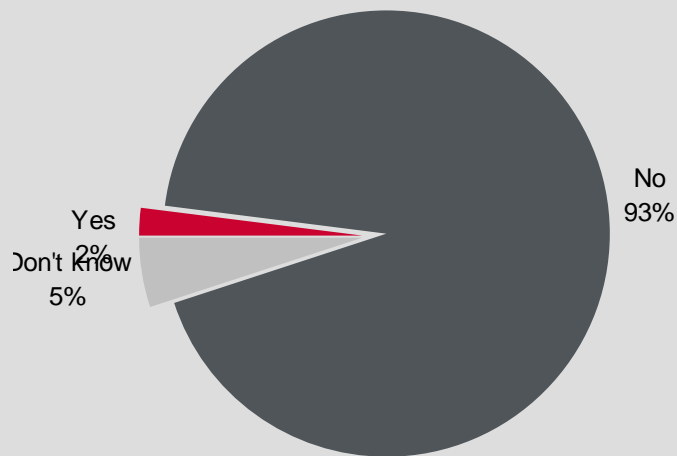


3.3 eSafety systems in company cars

3.3.3 Blind Spot Monitoring

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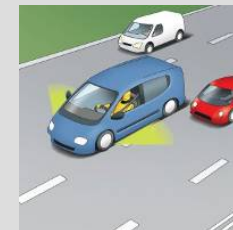
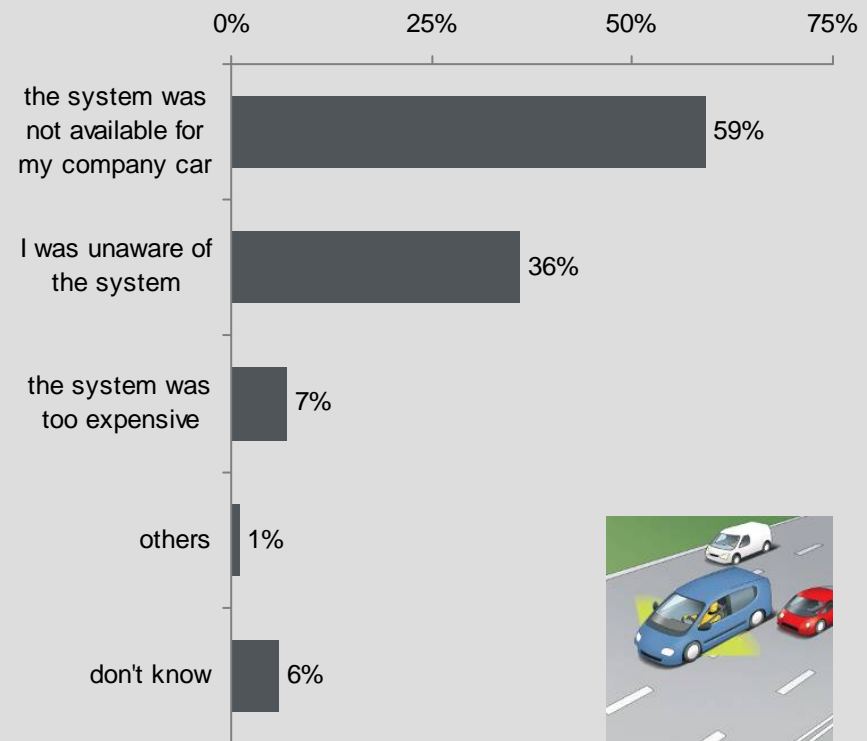
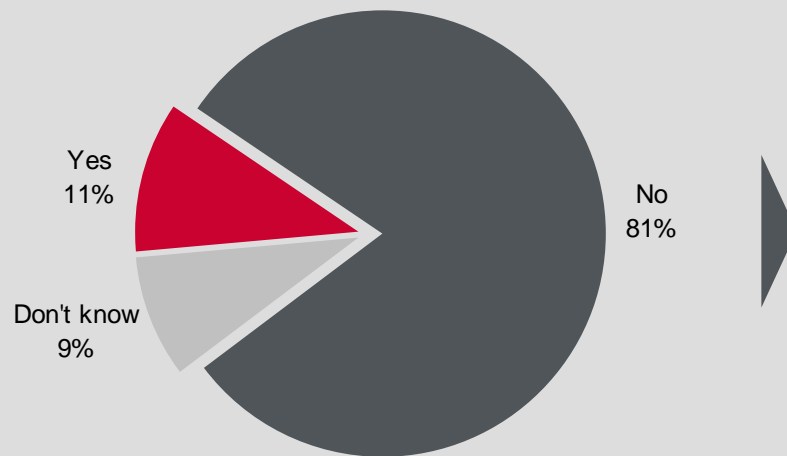


3.3 eSafety systems in company cars

3.3.3 Blind Spot Monitoring

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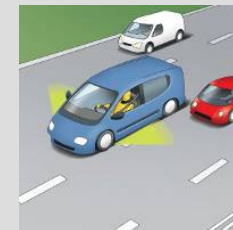
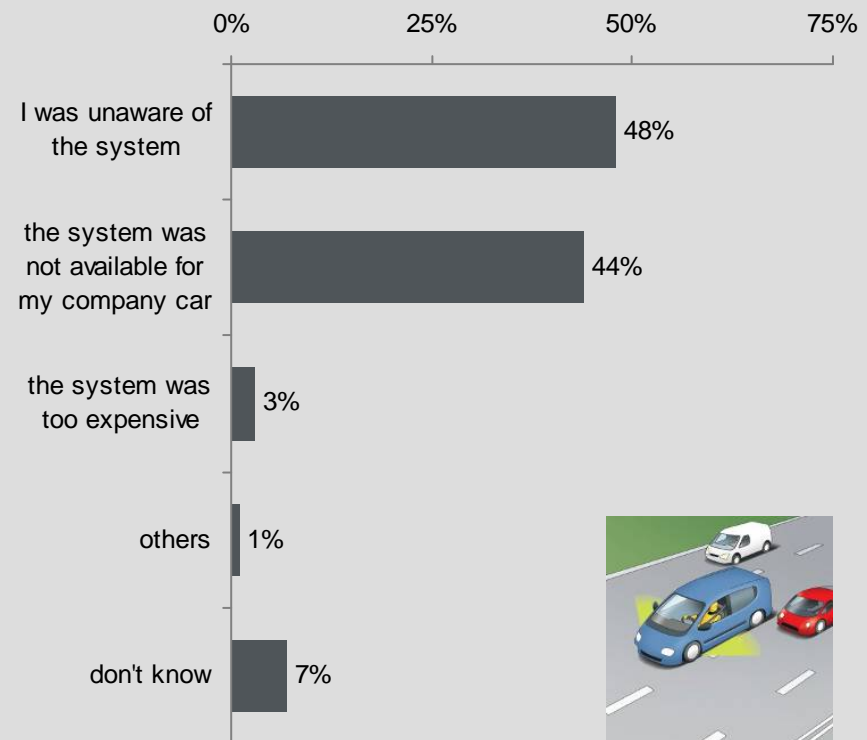
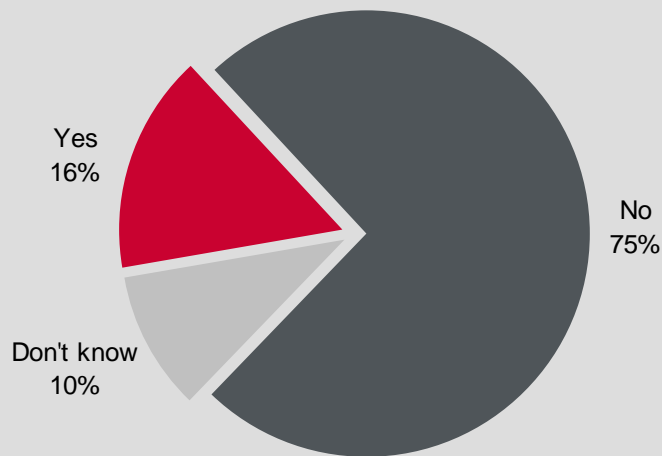
3.3 eSafety systems in company cars

3.3.3 Blind Spot Monitoring



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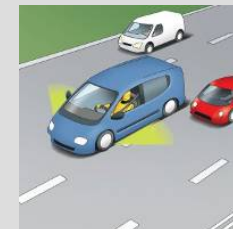
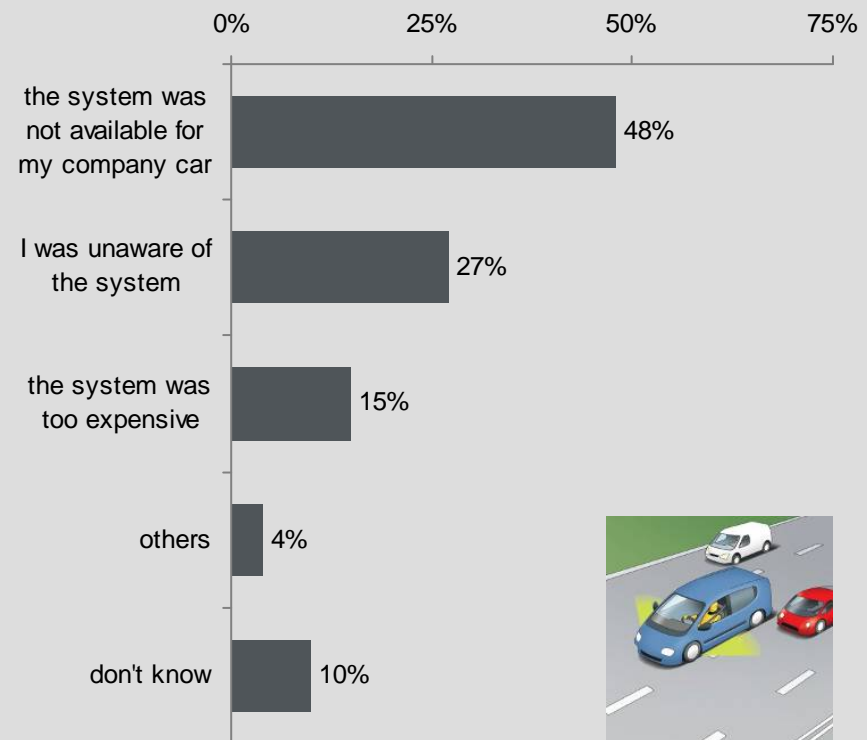
3.3 eSafety systems in company cars

3.3.3 Blind Spot Monitoring



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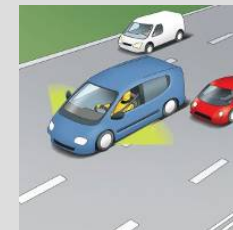
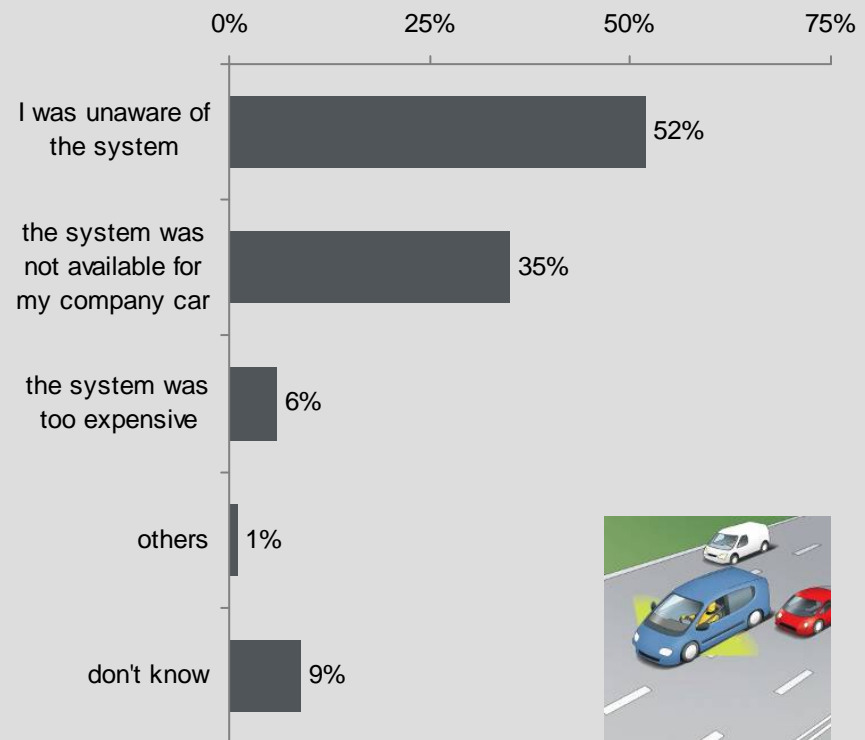
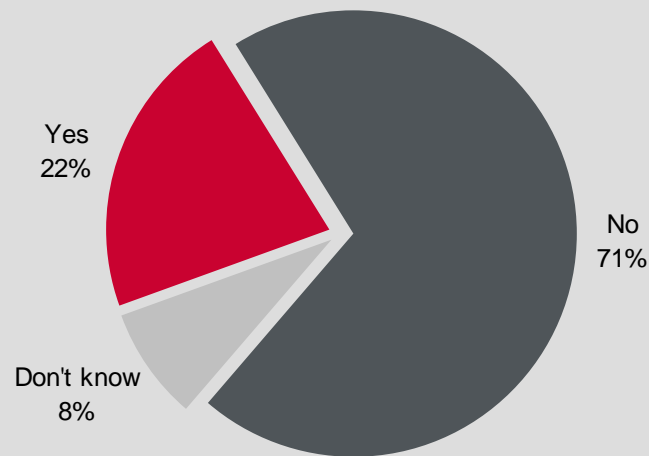
3.3 eSafety systems in company cars

3.3.3 Blind Spot Monitoring



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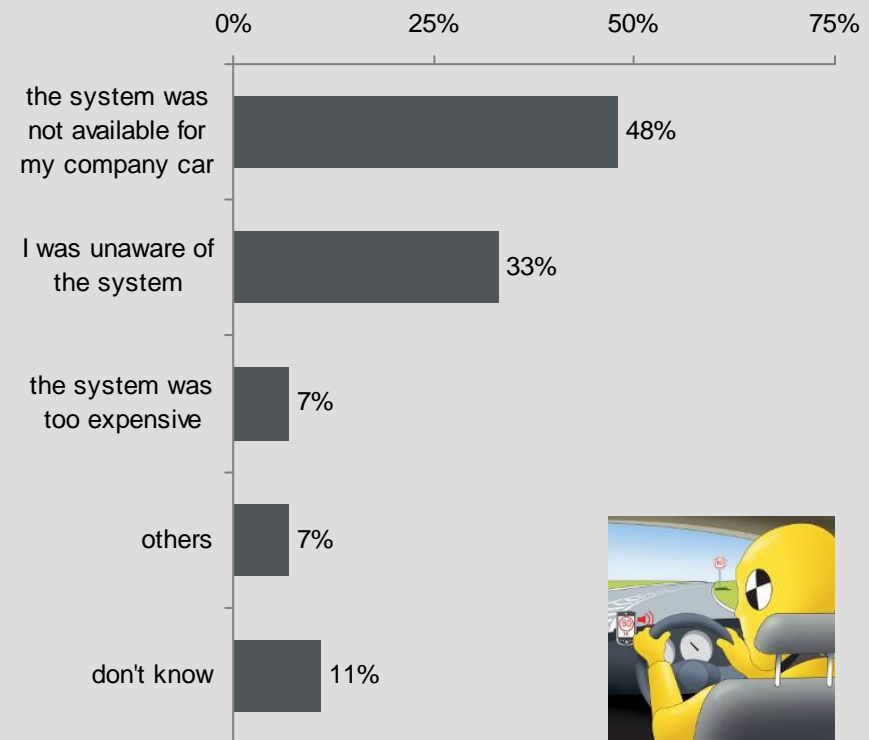
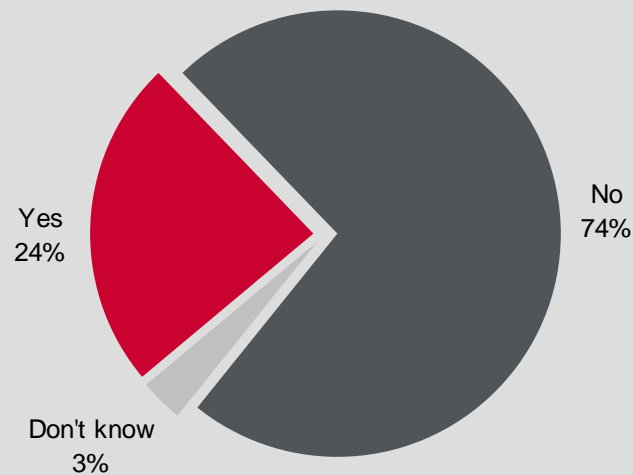
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3.3 eSafety systems in company cars

3.3.4 Speed Alert

Is your present company car equipped with Speed Alert?

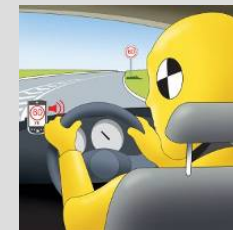
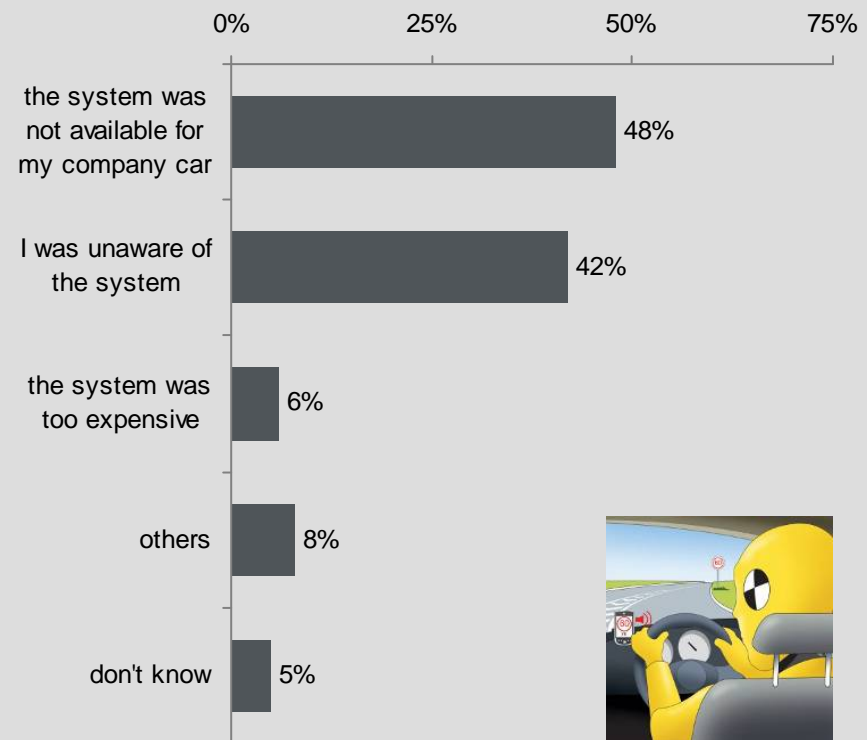
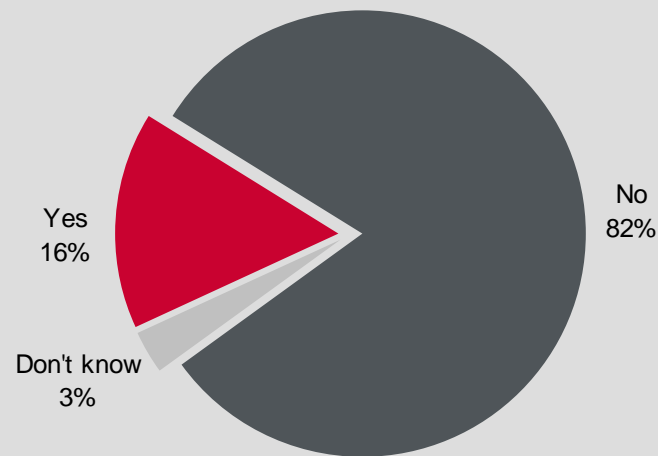
Why is your present company car not equipped with Speed Alert? (multiple answers possible; filter: only respondents with “no”)



3.3 eSafety systems in company cars

3.3.4 Speed Alert

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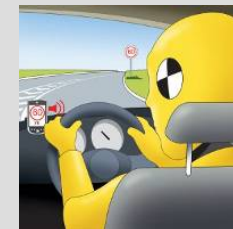
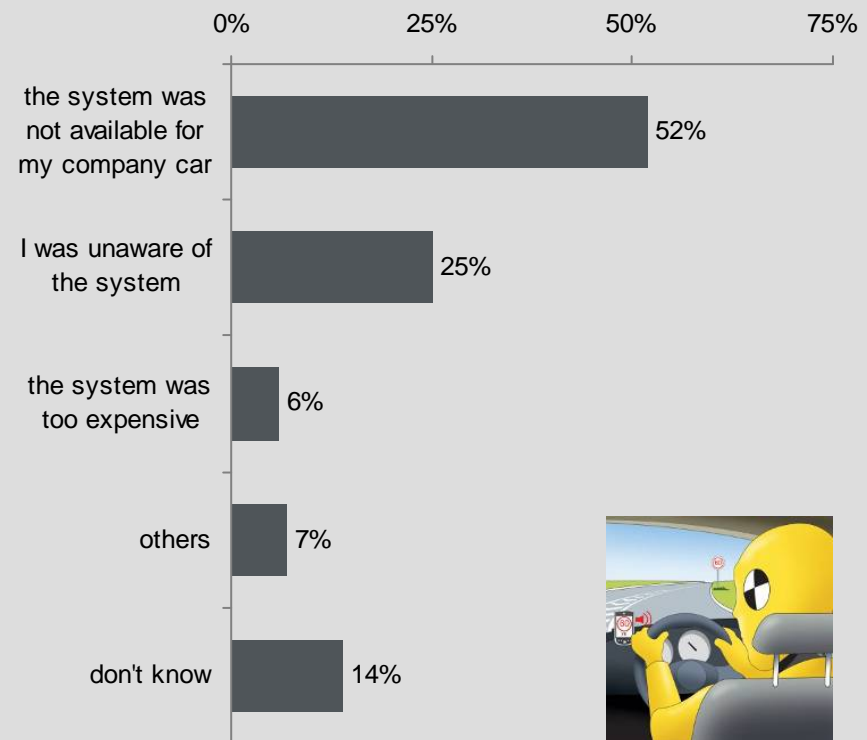
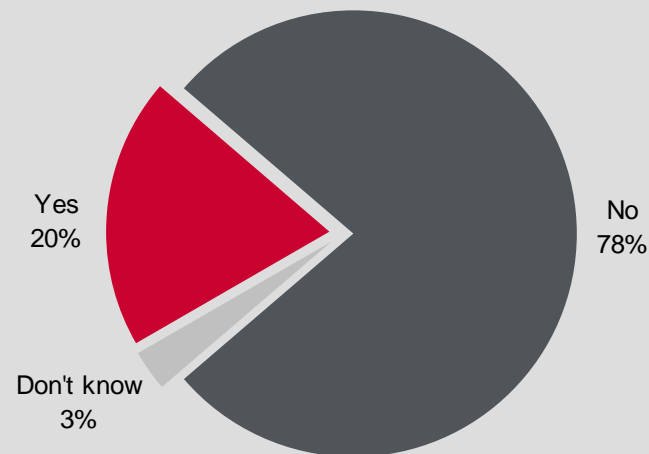
3.3 eSafety systems in company cars

3.3.4 Speed Alert



Is your present company car equipped with Speed Alert?

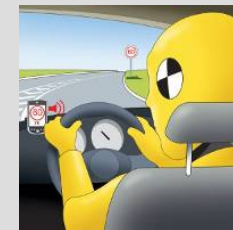
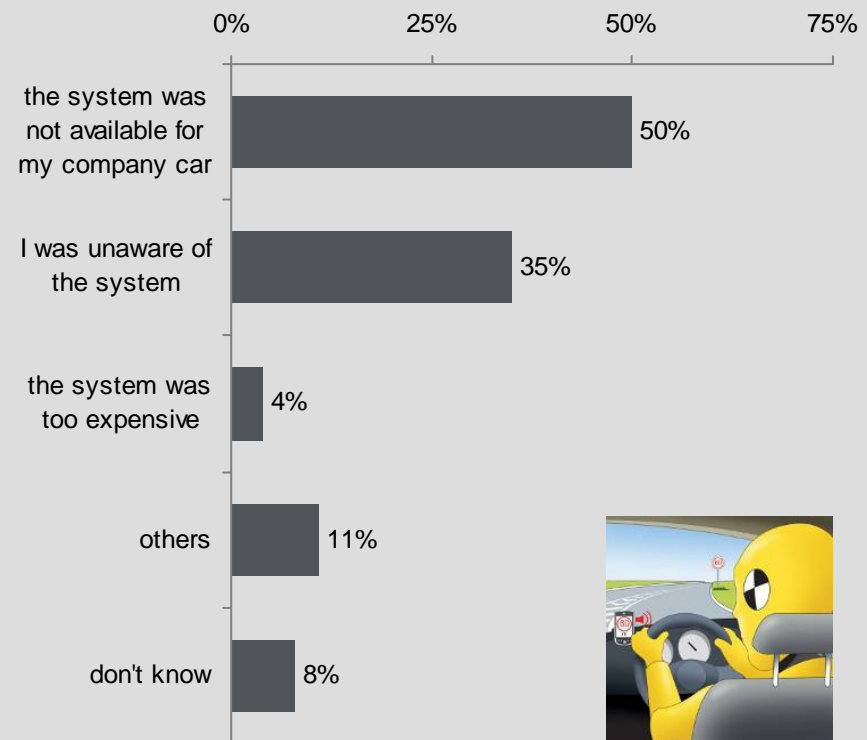
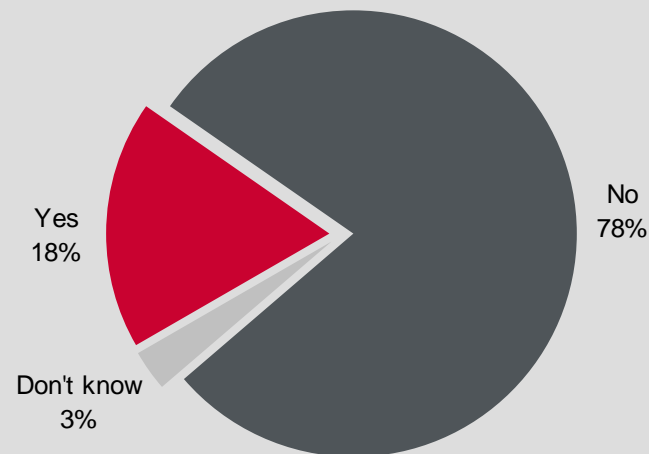
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3.3 eSafety systems in company cars

3.3.4 Speed Alert

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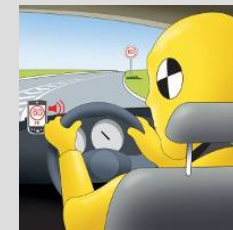
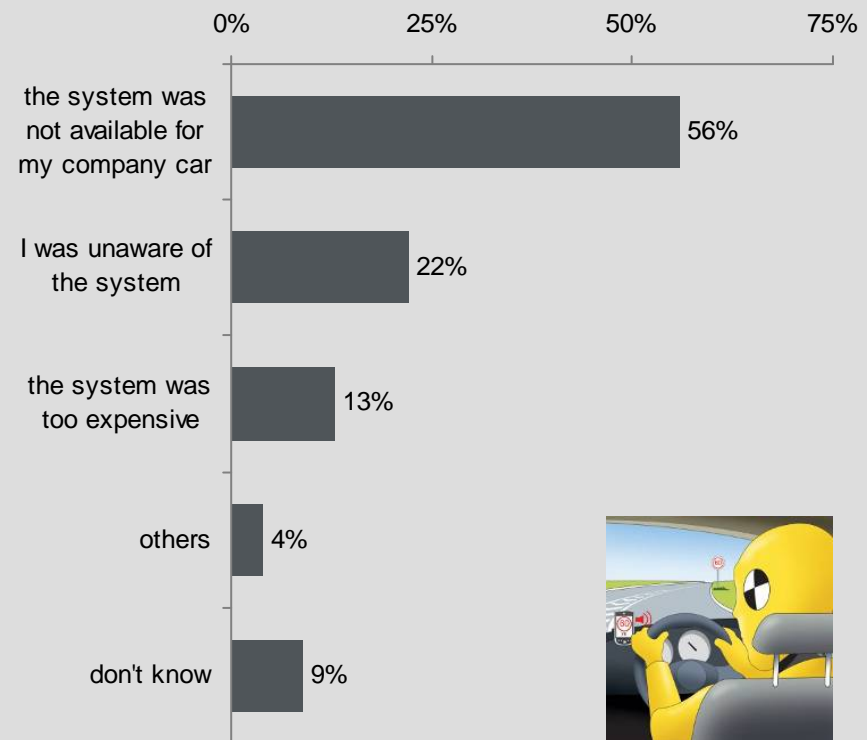
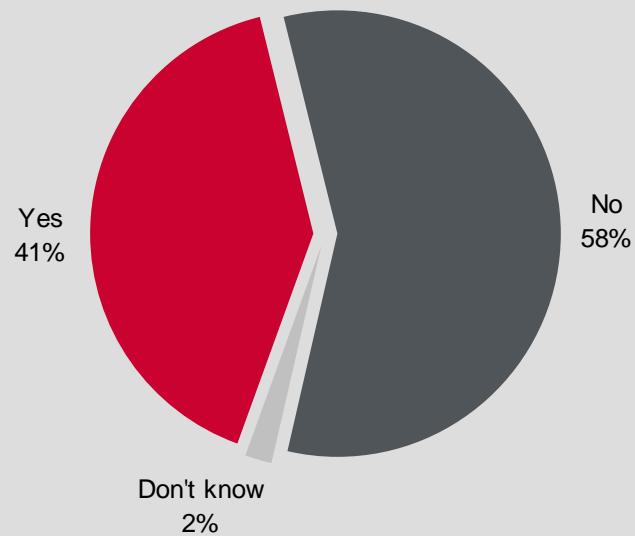


3.3 eSafety systems in company cars

3.3.4 Speed Alert

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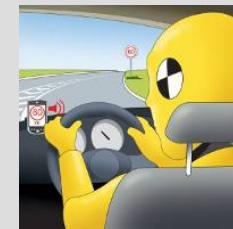
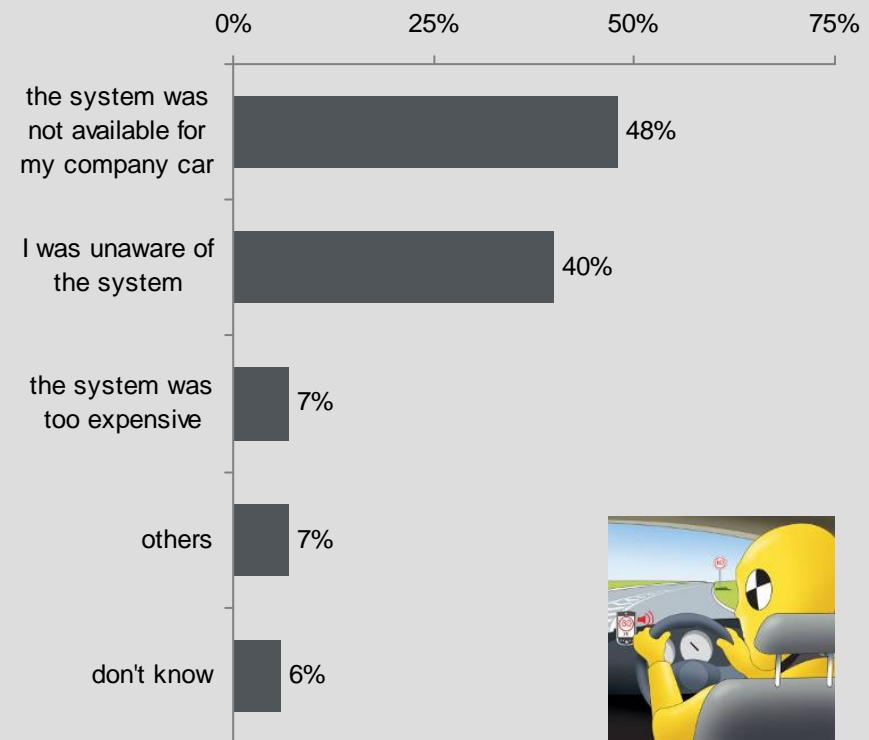
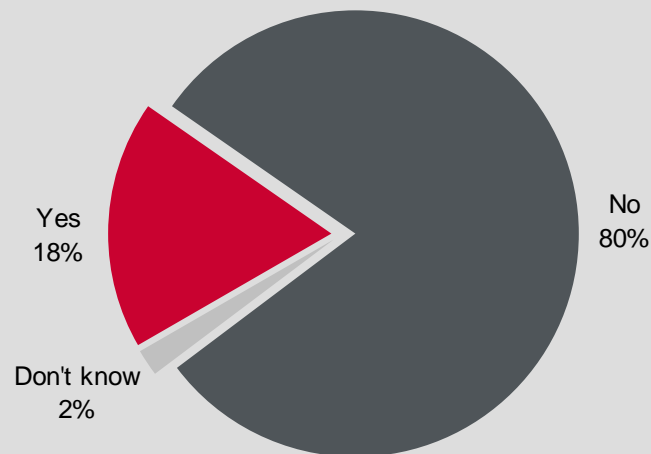


3.3 eSafety systems in company cars

3.3.4 Speed Alert



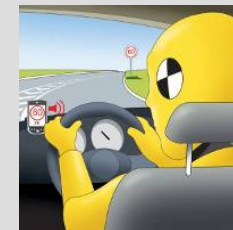
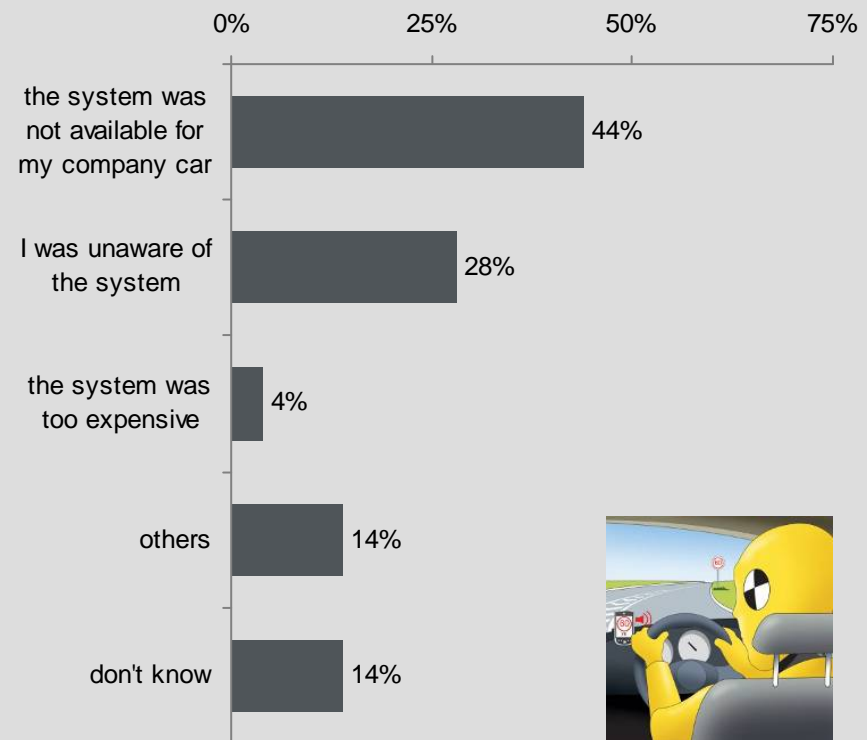
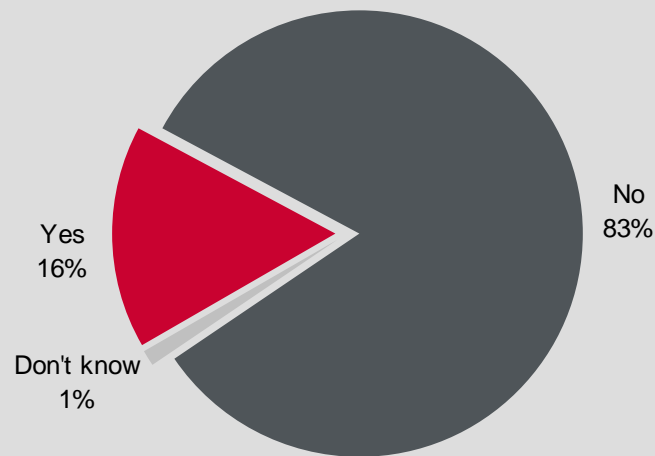
Is your present company car equipped with Speed Alert?
Why is your present company car not equipped with Speed Alert? (multiple answers possible; filter: only respondents with “no”)



3.3 eSafety systems in company cars

3.3.4 Speed Alert

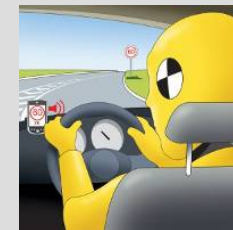
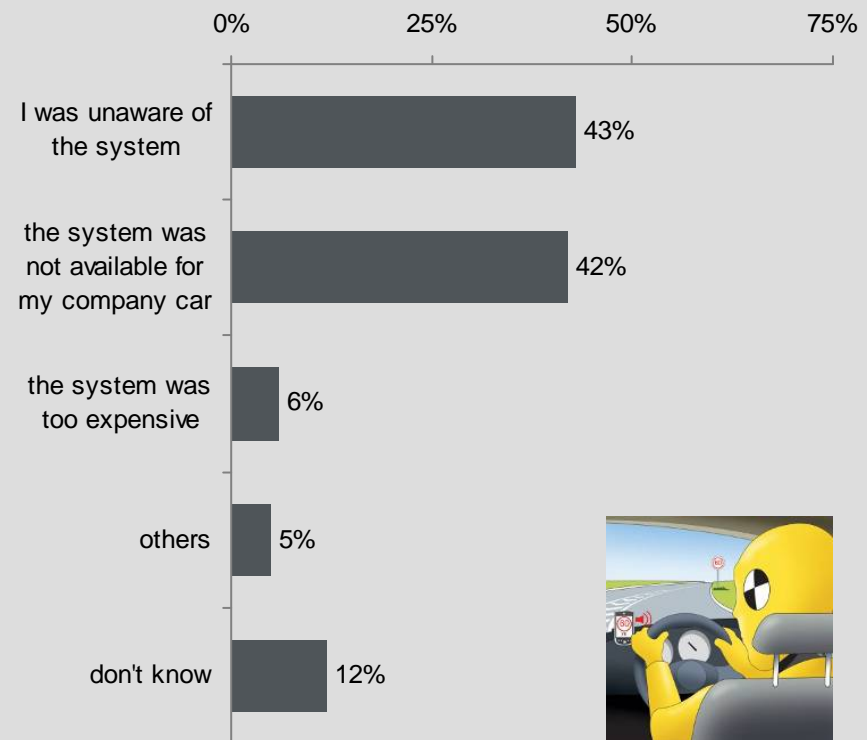
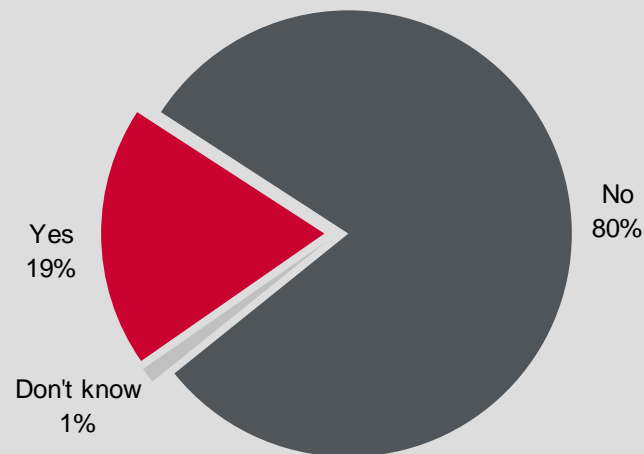
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3.3 eSafety systems in company cars

3.3.4 Speed Alert

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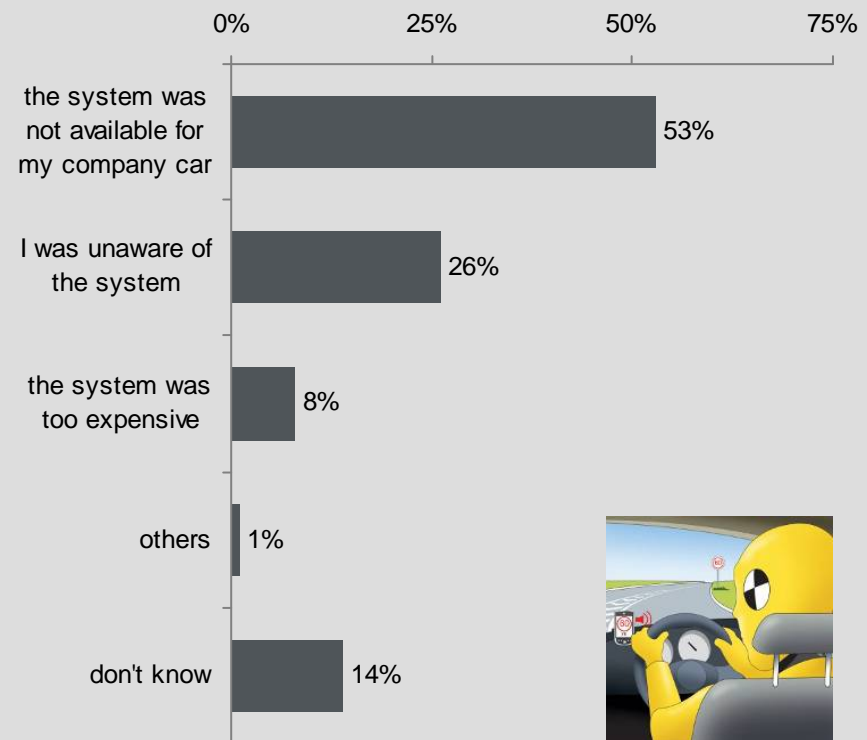
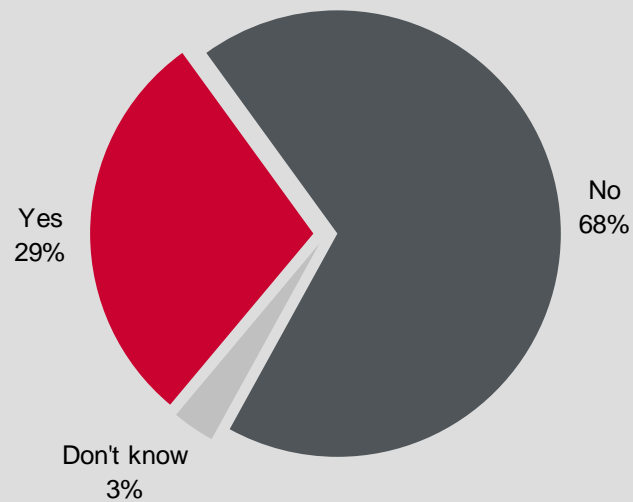
3.3 eSafety systems in company cars

3.3.4 Speed Alert



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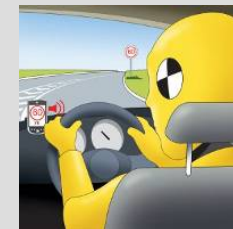
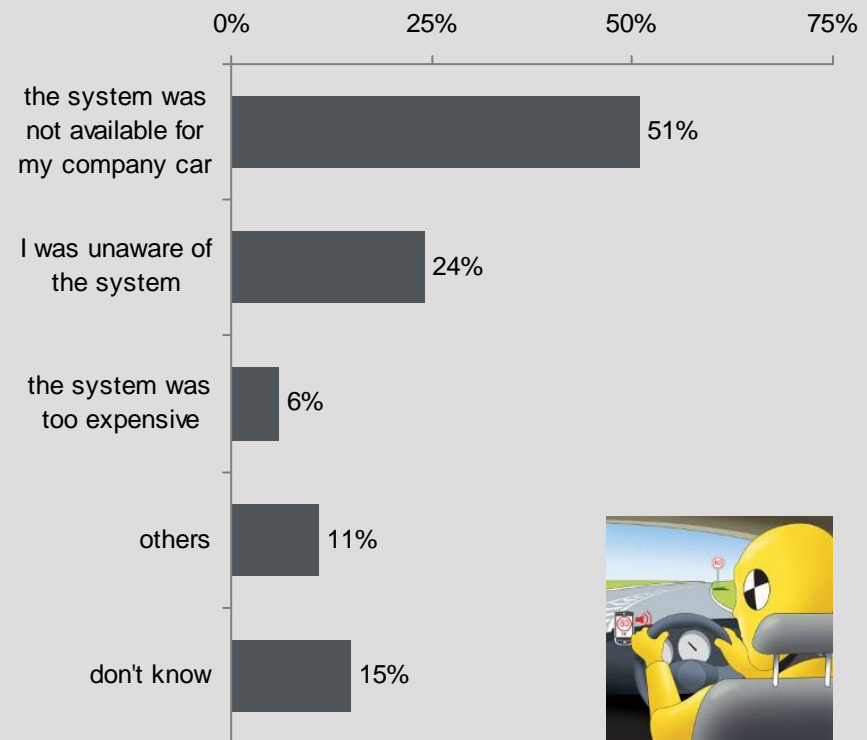
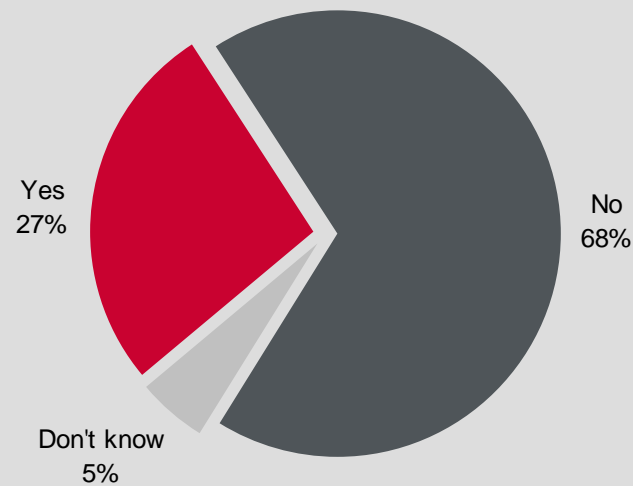
3.3 eSafety systems in company cars

3.3.4 Speed Alert



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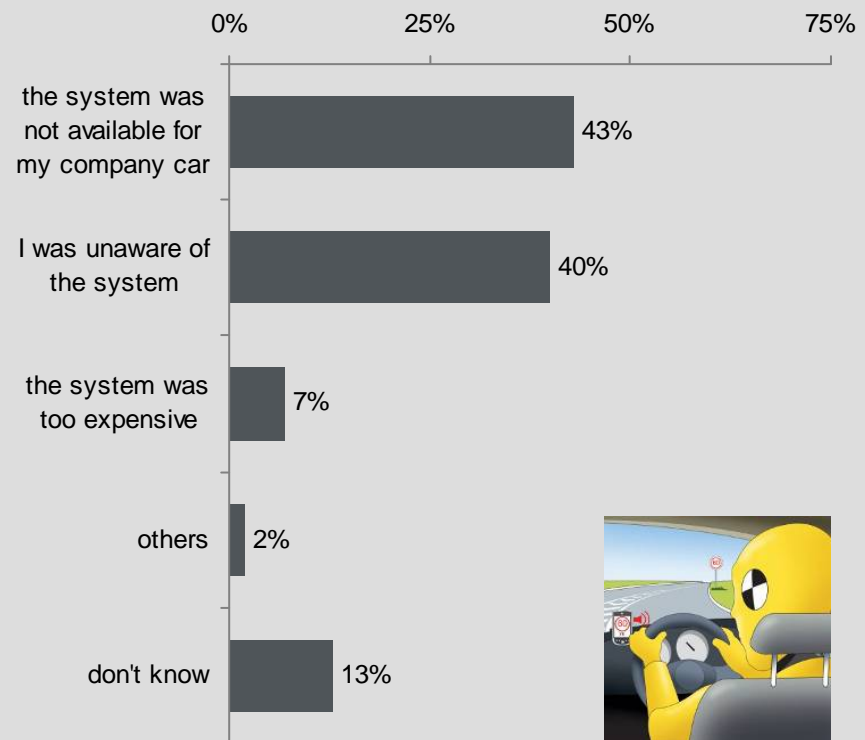
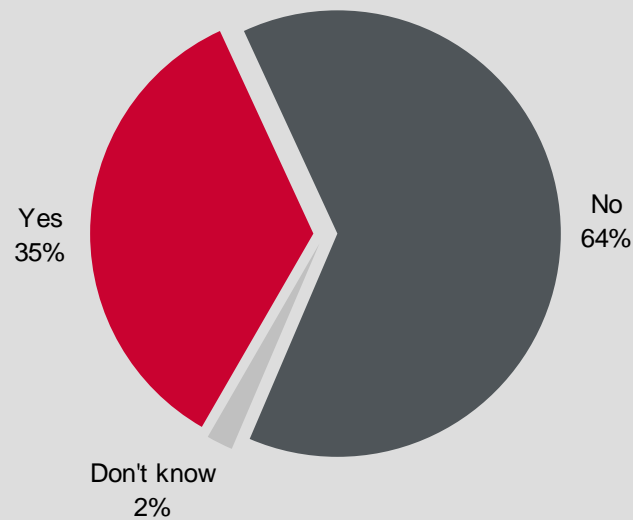
3.3 eSafety systems in company cars

3.3.4 Speed Alert



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Content

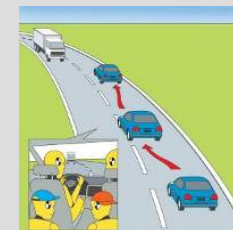
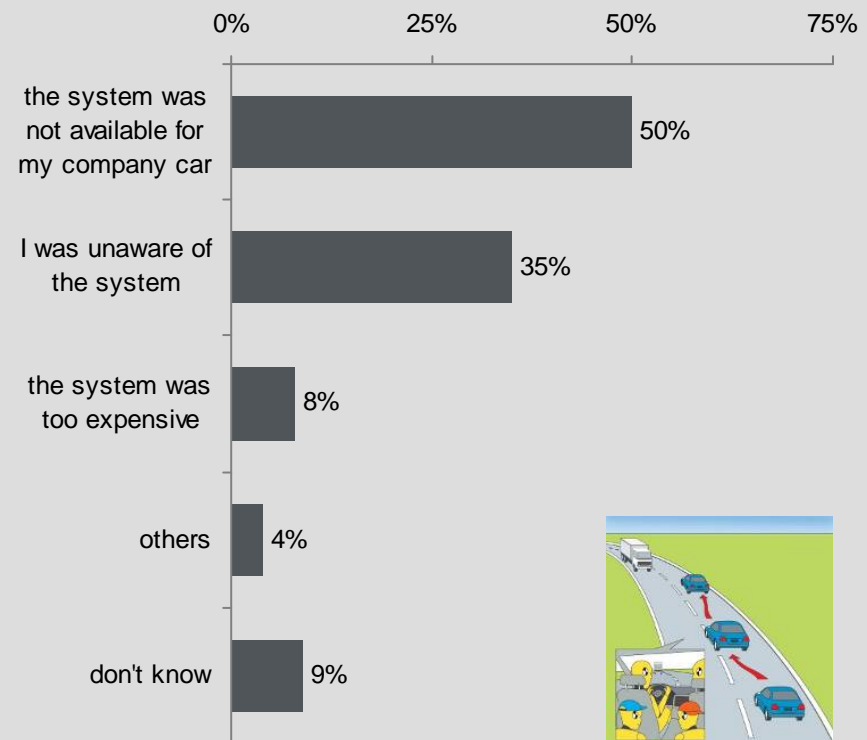
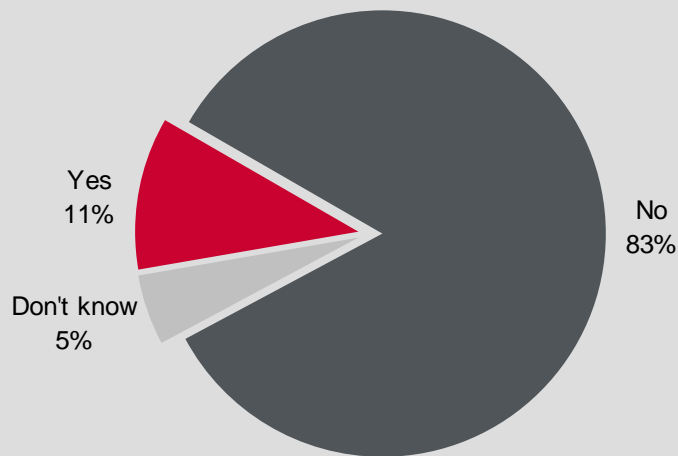
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 - 3.4 Information and responsibility

3.3 eSafety systems in company cars

3.3.5 Lane Support System

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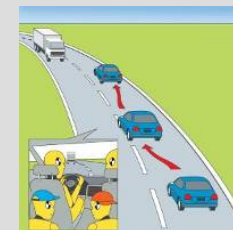
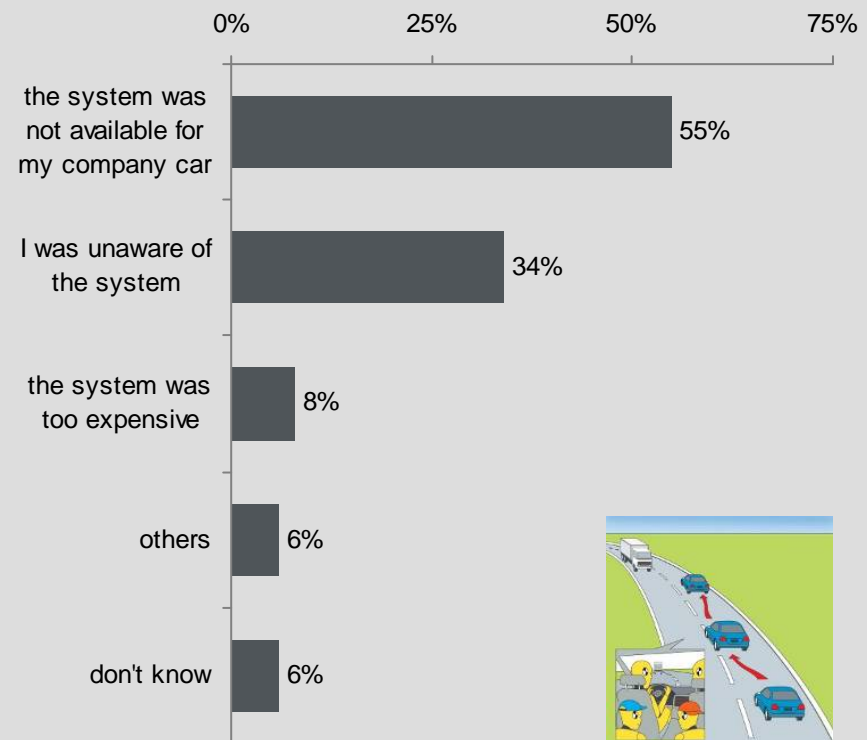
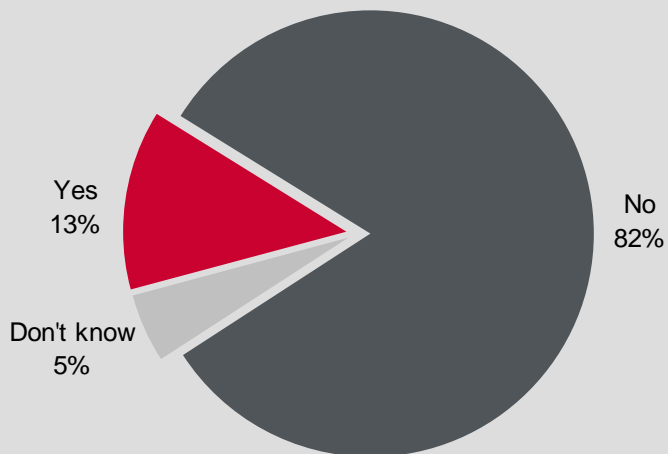


3.3 eSafety systems in company cars

3.3.5 Lane Support System

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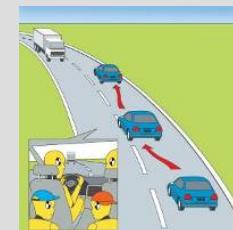
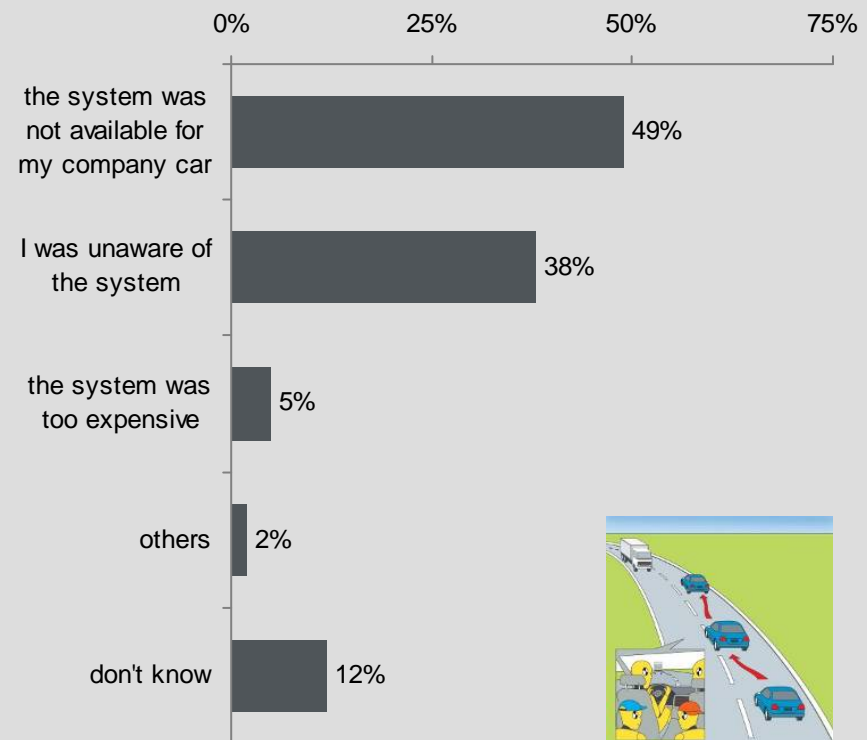
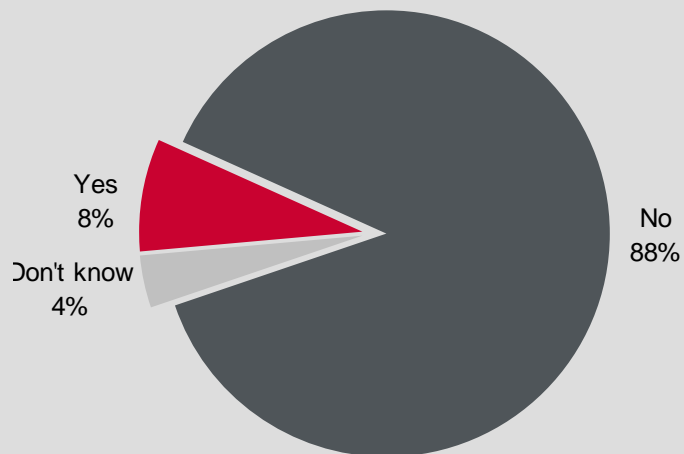
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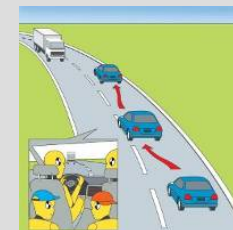
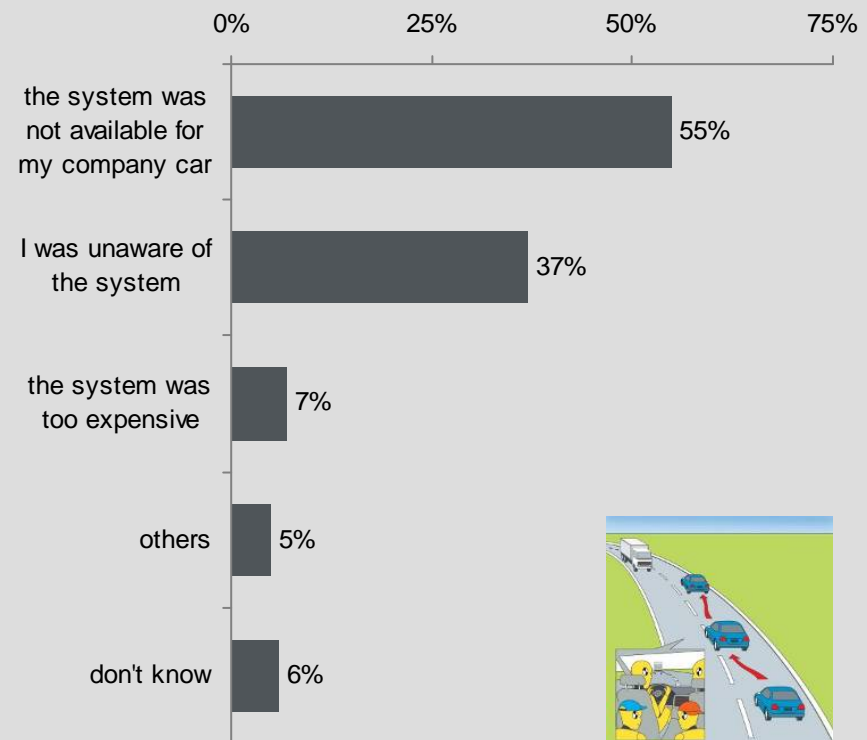
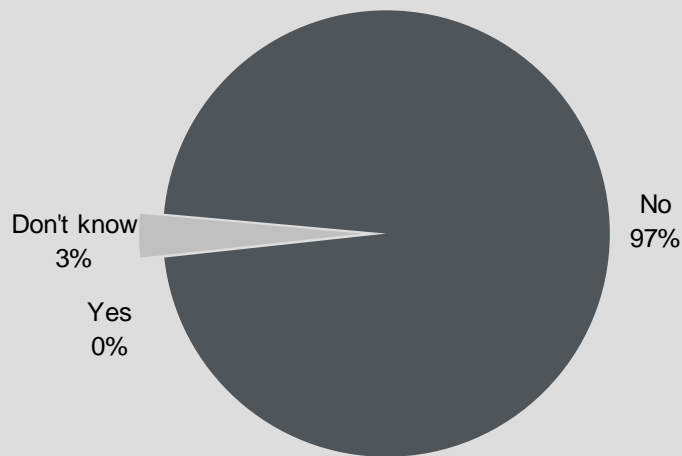


3.3 eSafety systems in company cars

3.3.5 Lane Support System

Is your present company car equipped with Lane Support System?

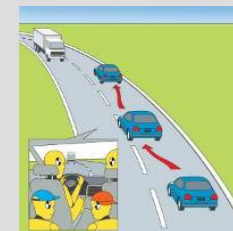
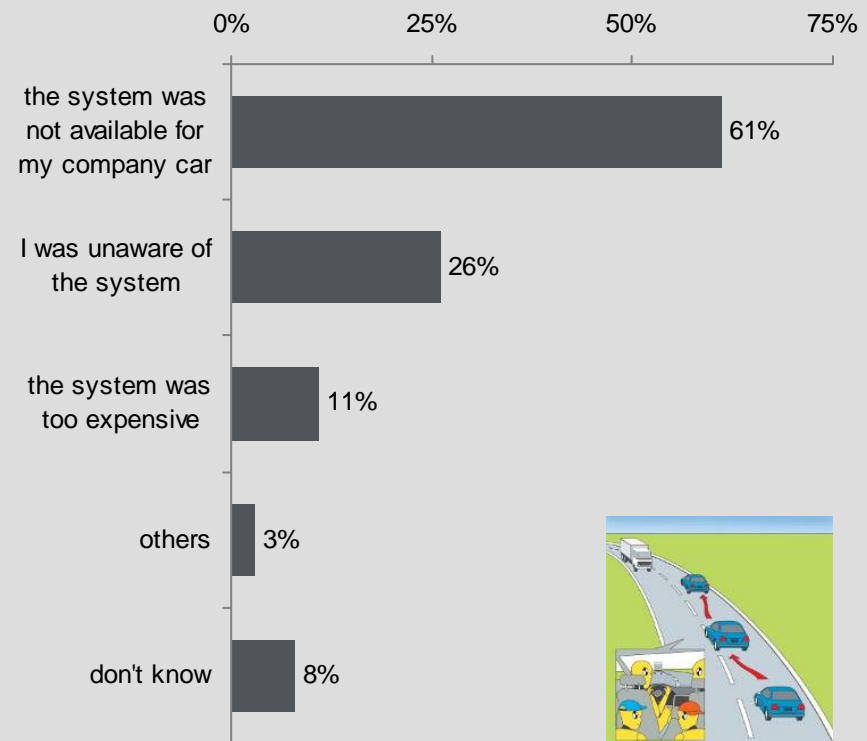
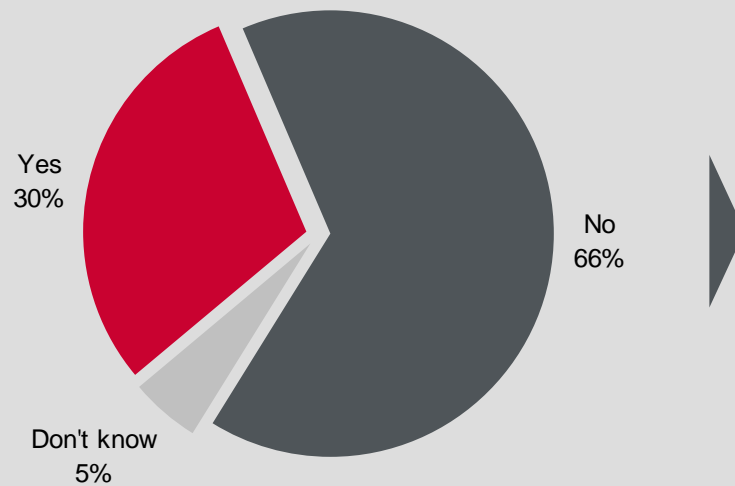
Why is your present company car not equipped with Lane Support System? (multiple answers possible; filter: only respondents with "no")



3.3 eSafety systems in company cars

3.3.5 Lane Support System

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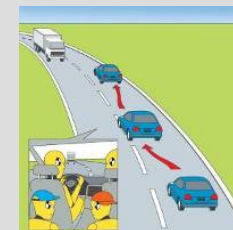
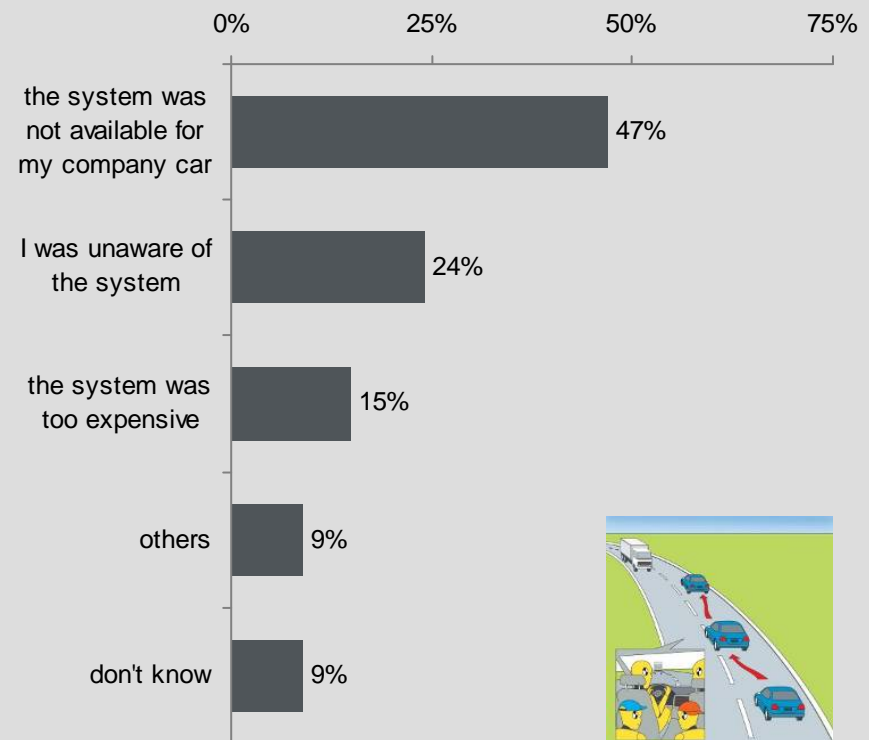
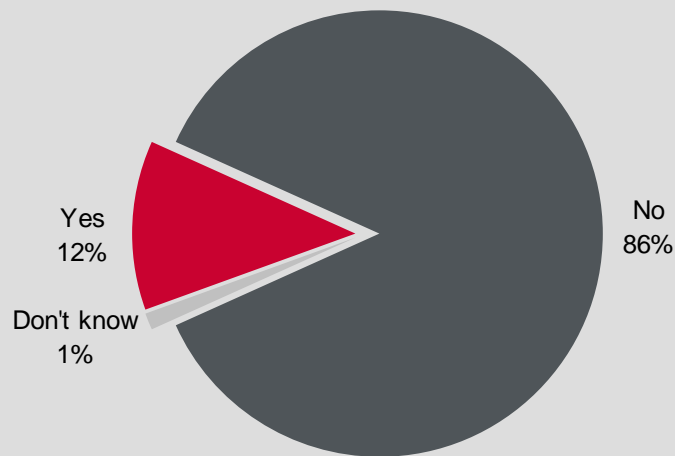
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3.3.5 Lane Support System



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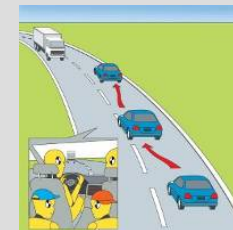
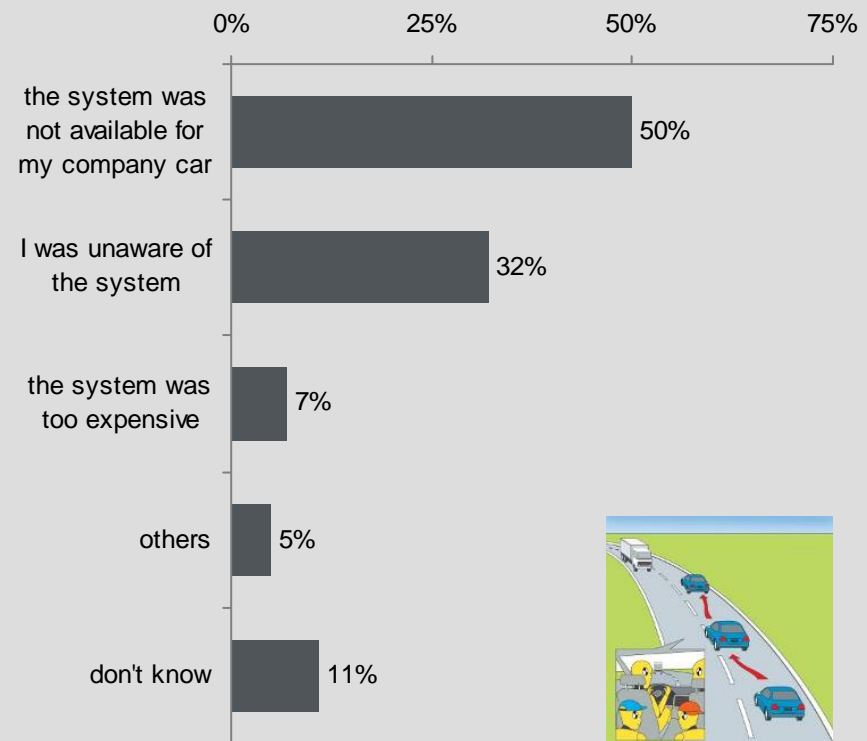
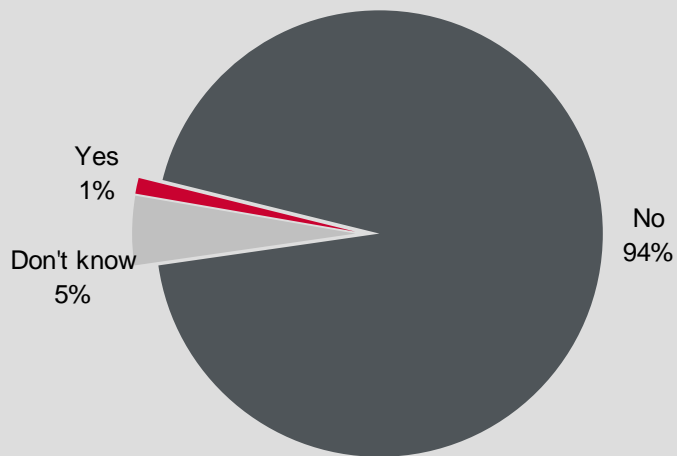


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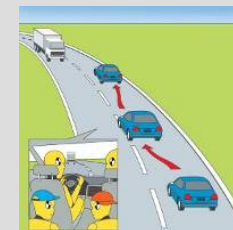
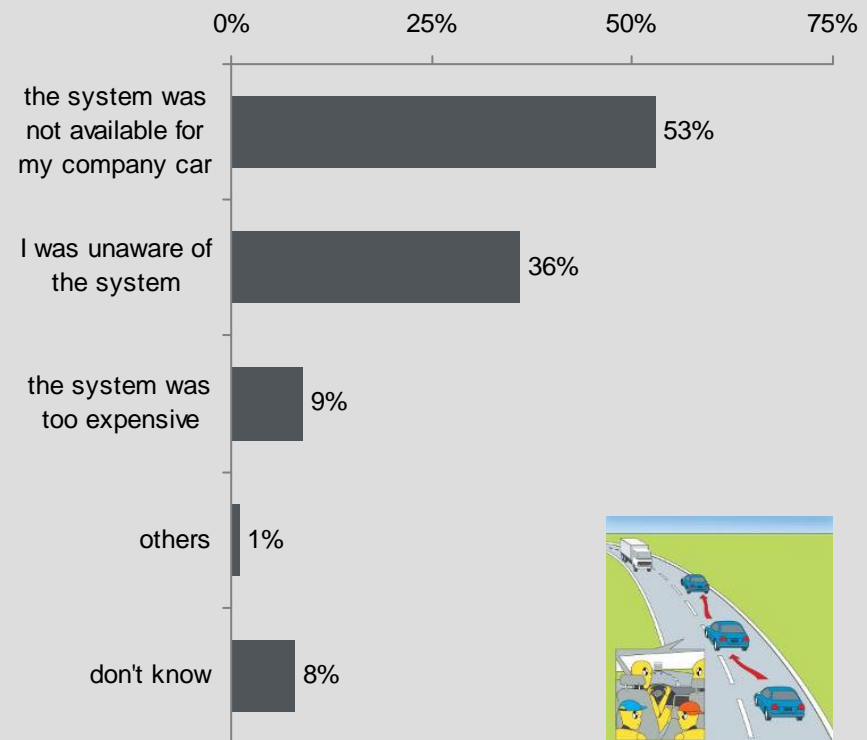
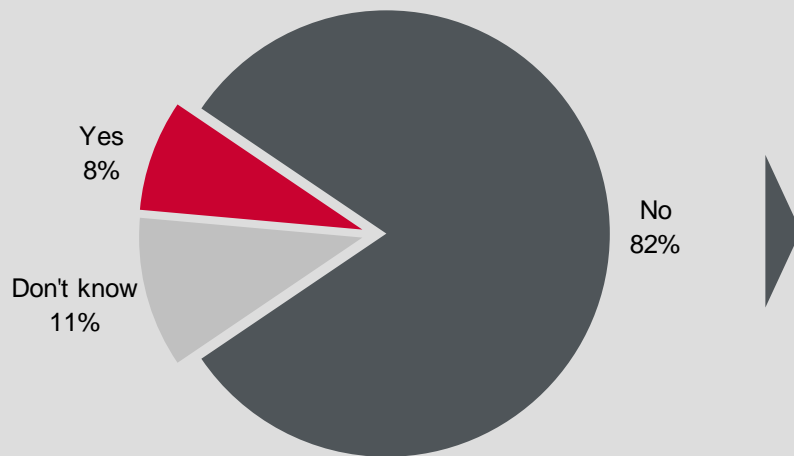


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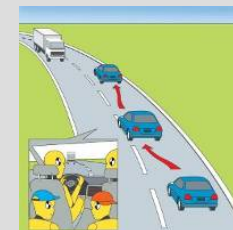
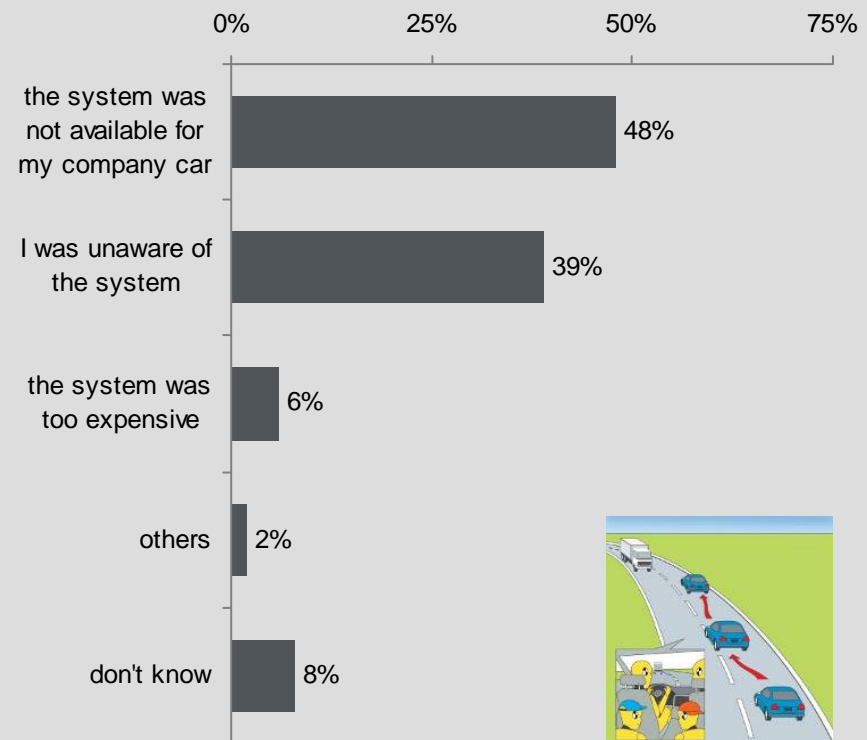
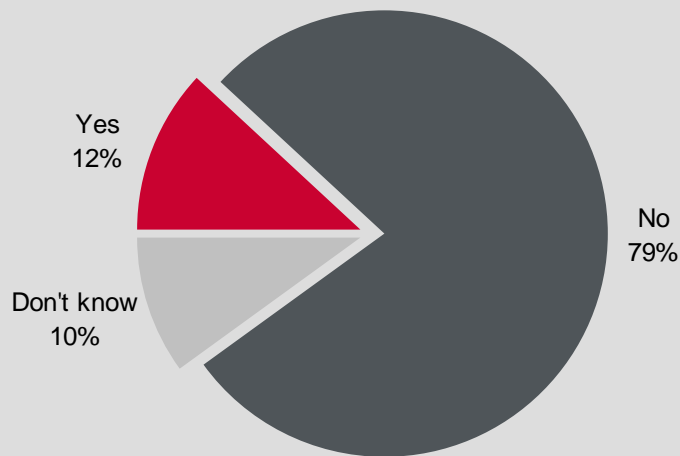
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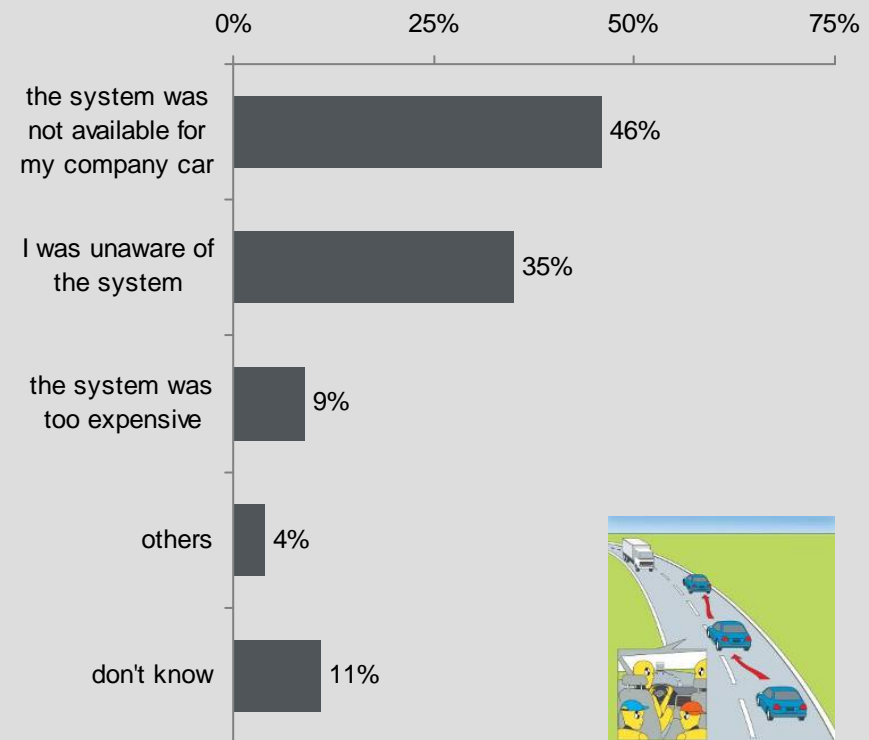
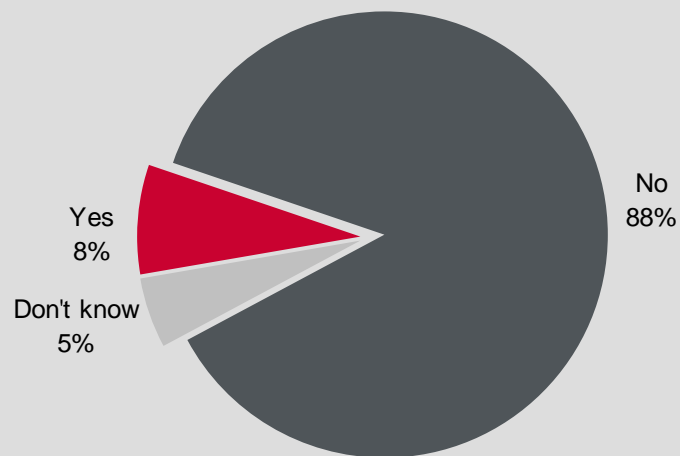
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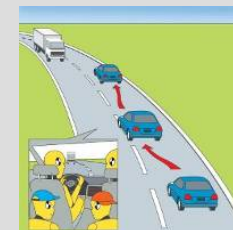
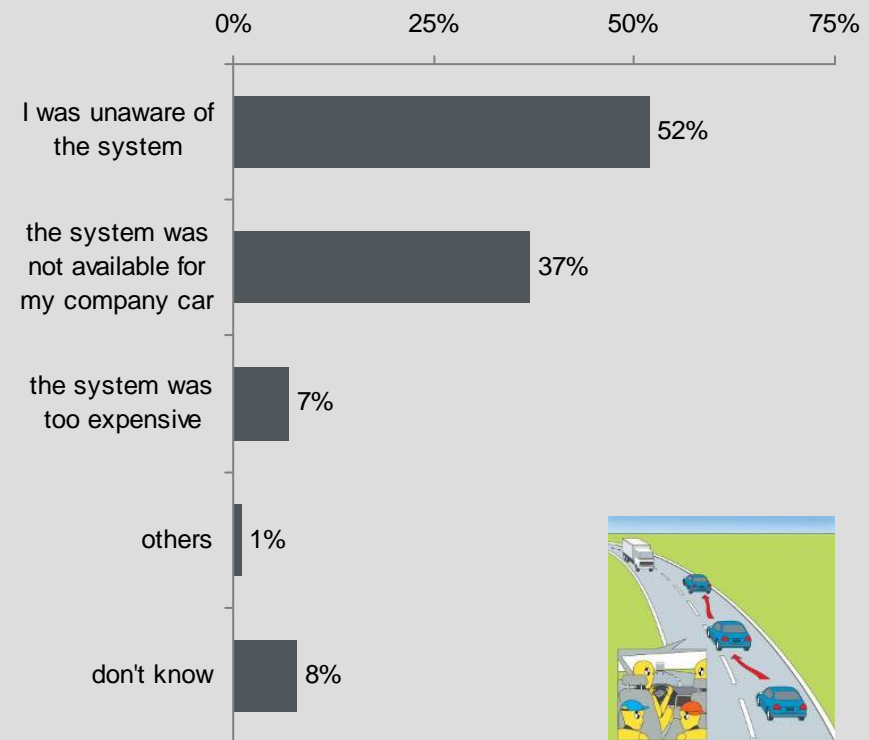
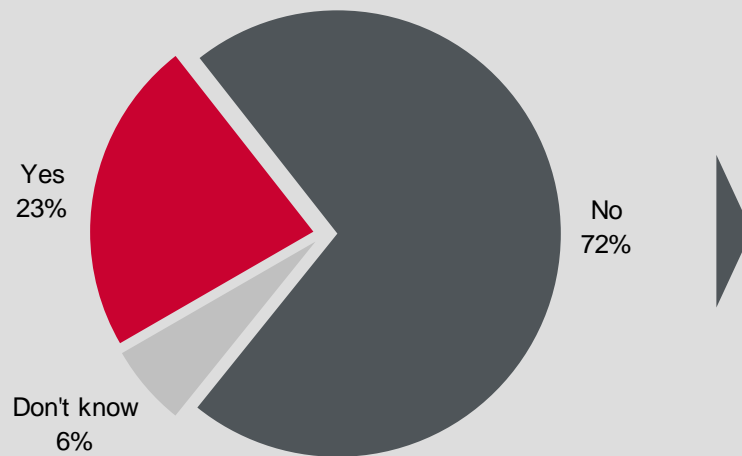
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3.3.5 Lane Support System



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Content

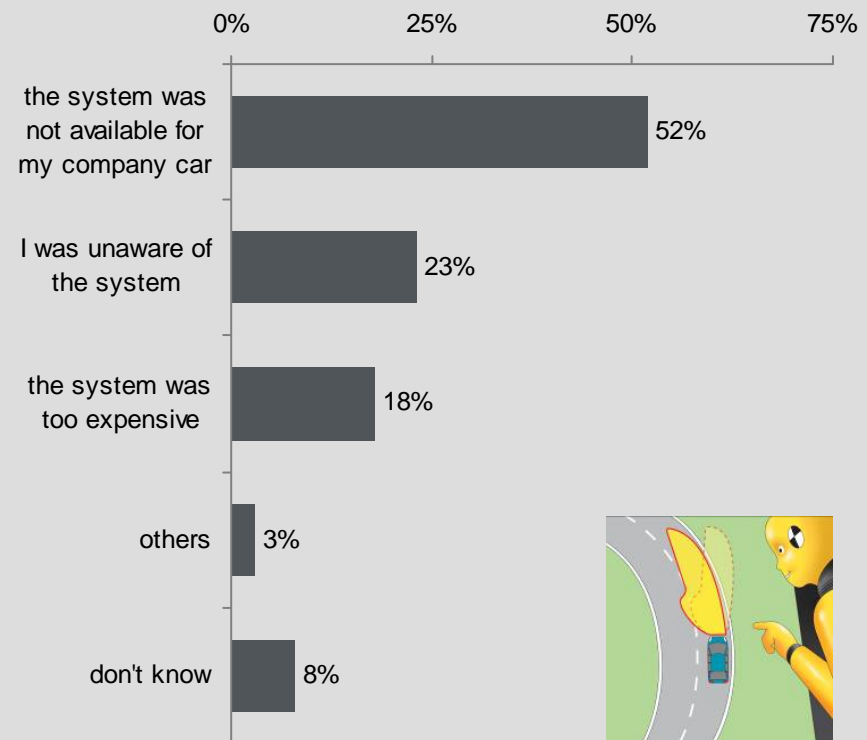
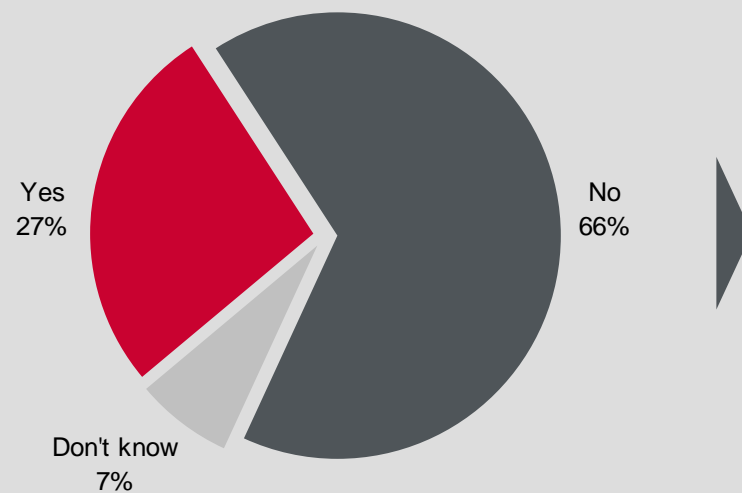
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 - 3.4 Information and responsibility

3.3 eSafety systems in company cars

3.3.6 Adaptive Headlights

Is your present company car equipped with Adaptive Headlights?

Why is your present company car not equipped with Adaptive Headlights? (multiple answers possible; filter: only respondents with “no”)

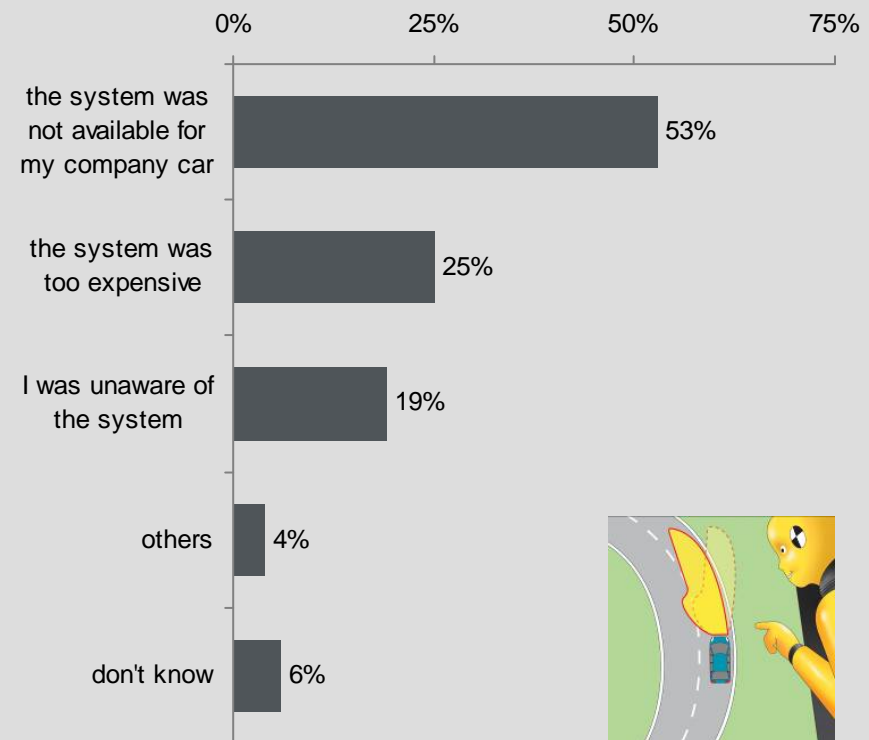
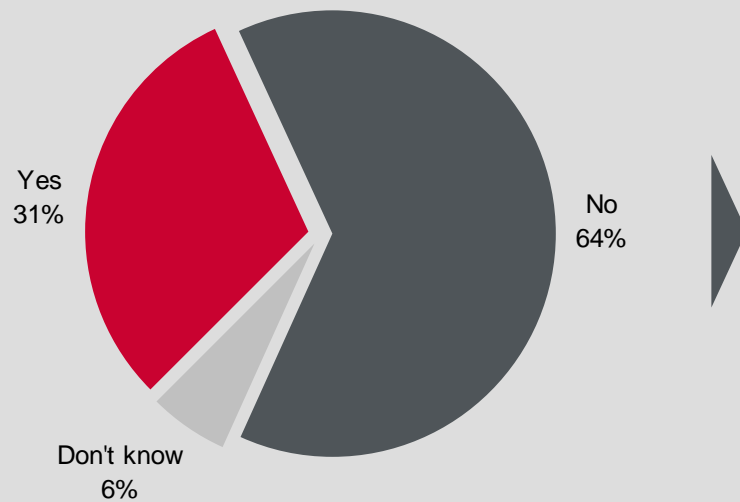


3.3 eSafety systems in company cars

3.3.6 Adaptive Headlights

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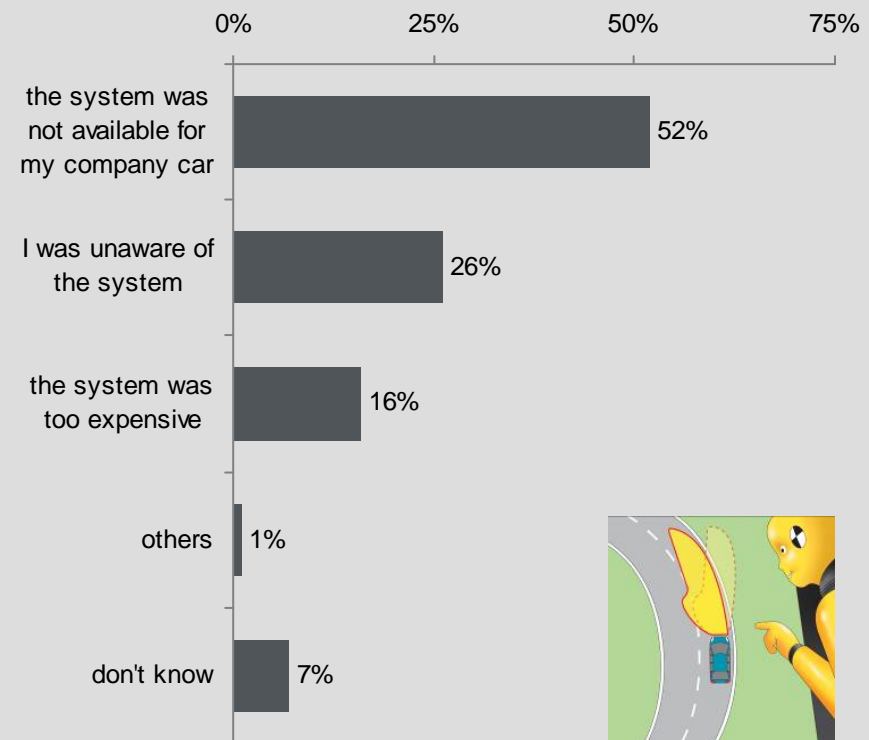
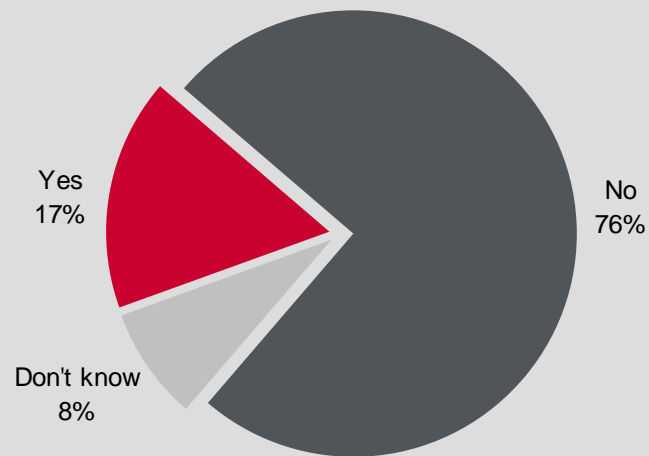
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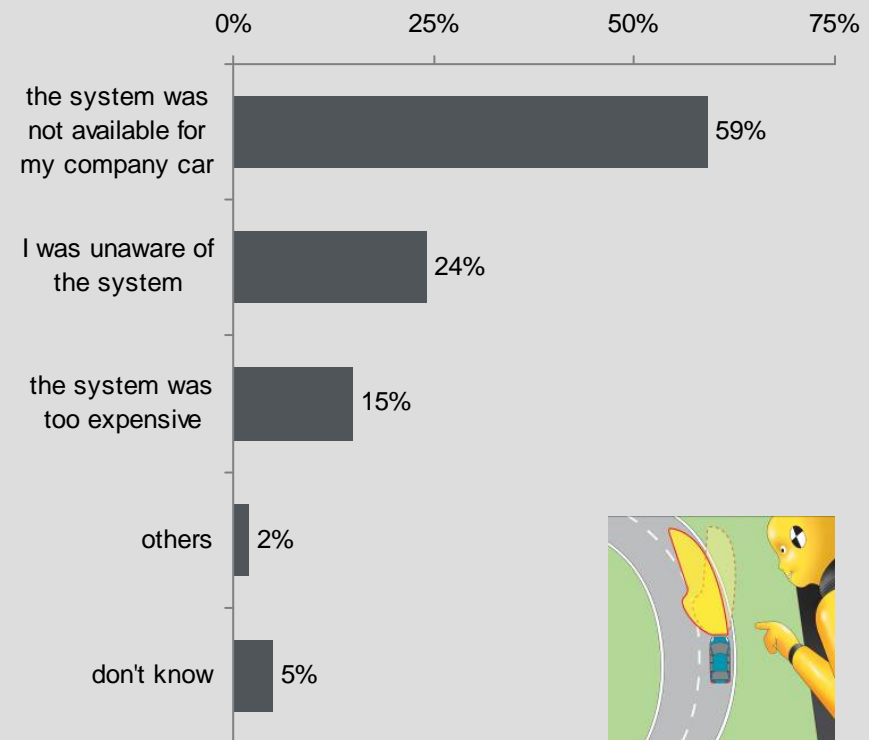
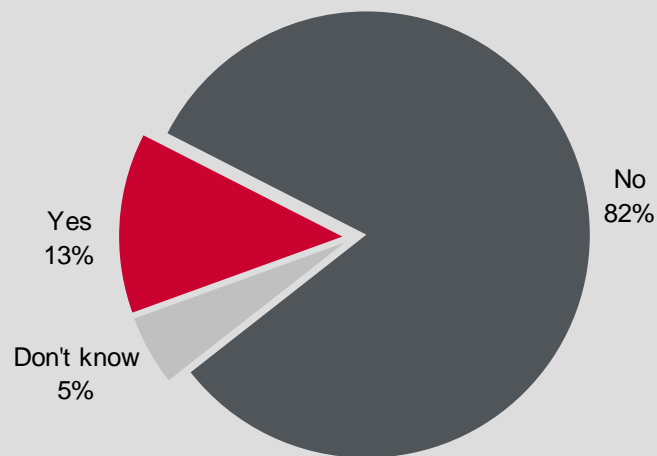


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3.3.6 Adaptive Headlights

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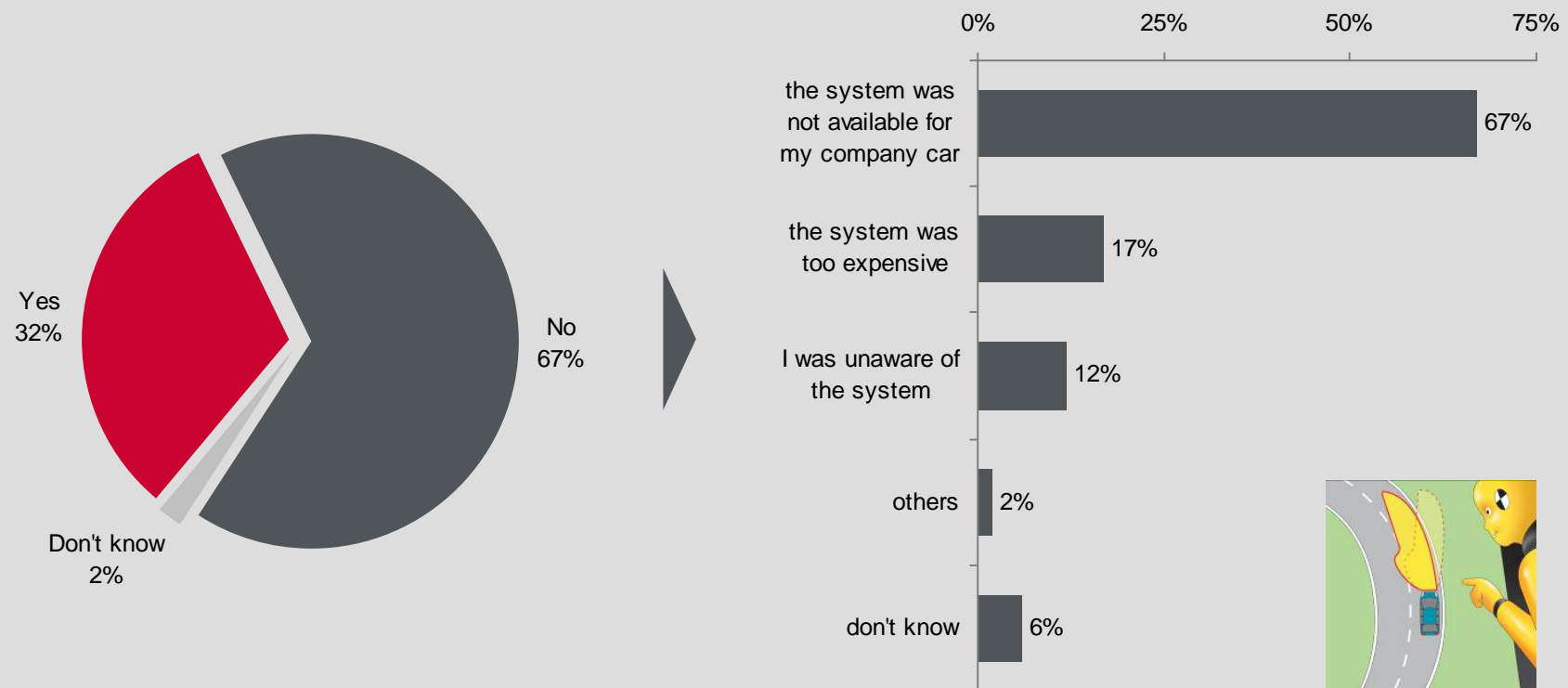


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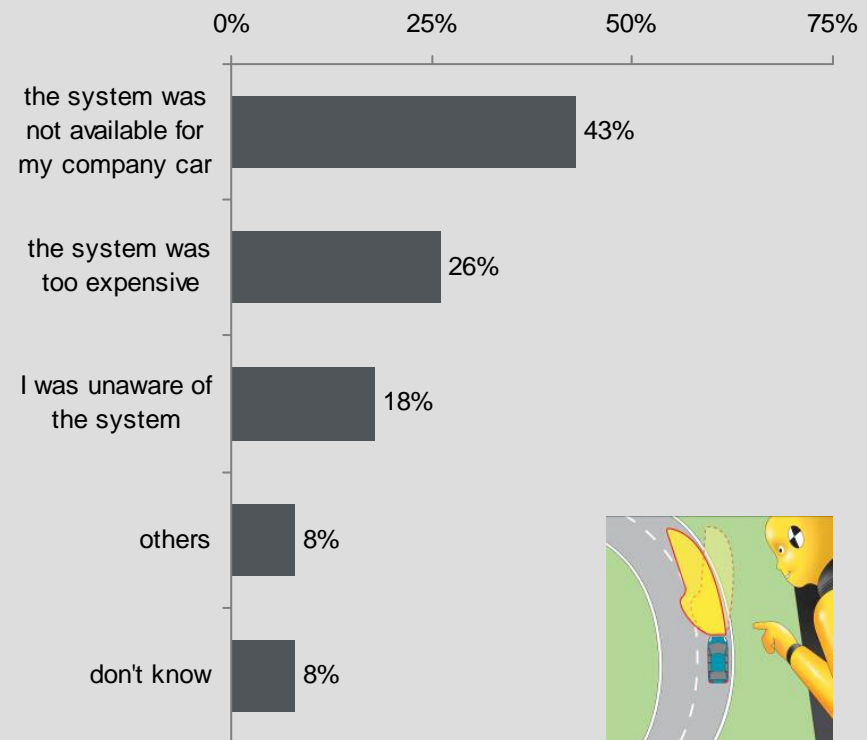
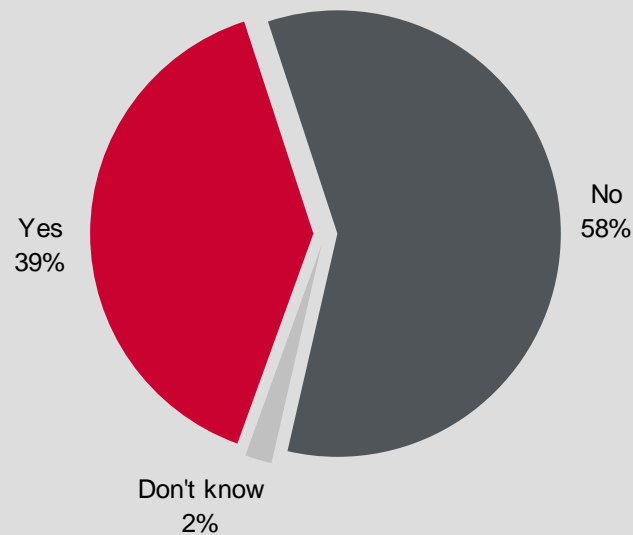
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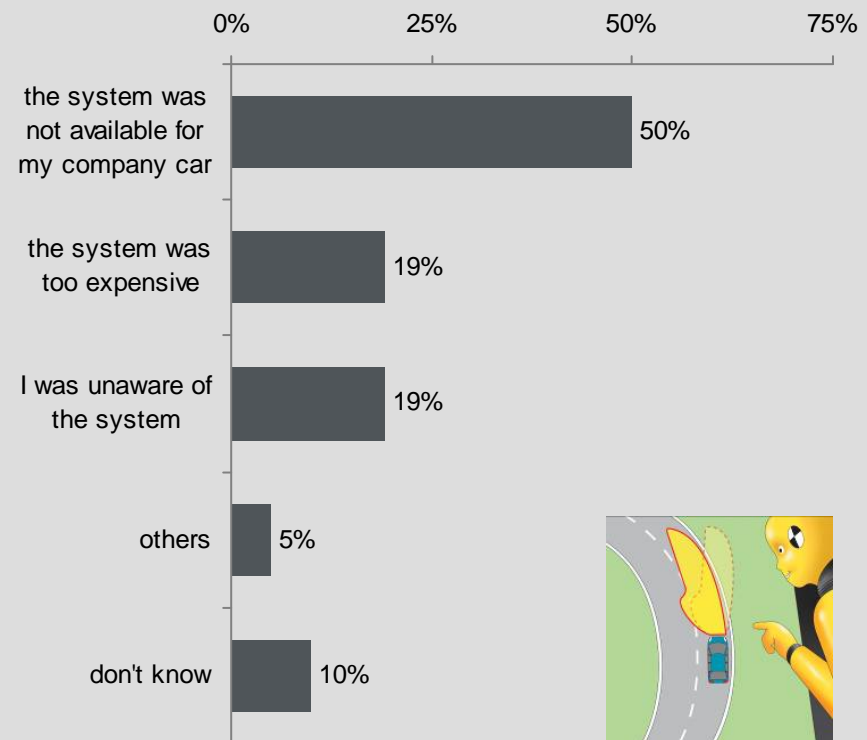
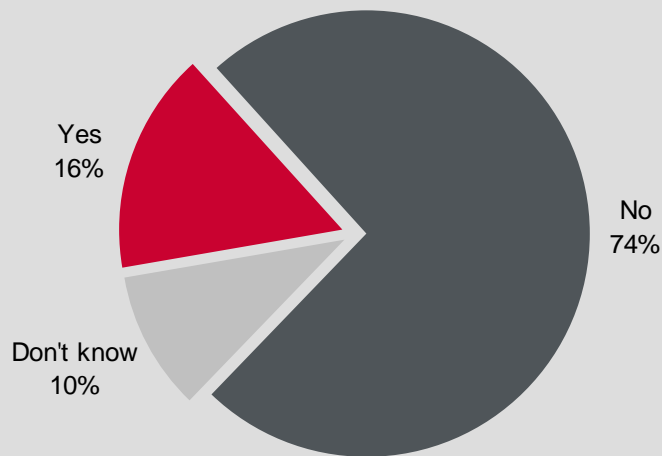


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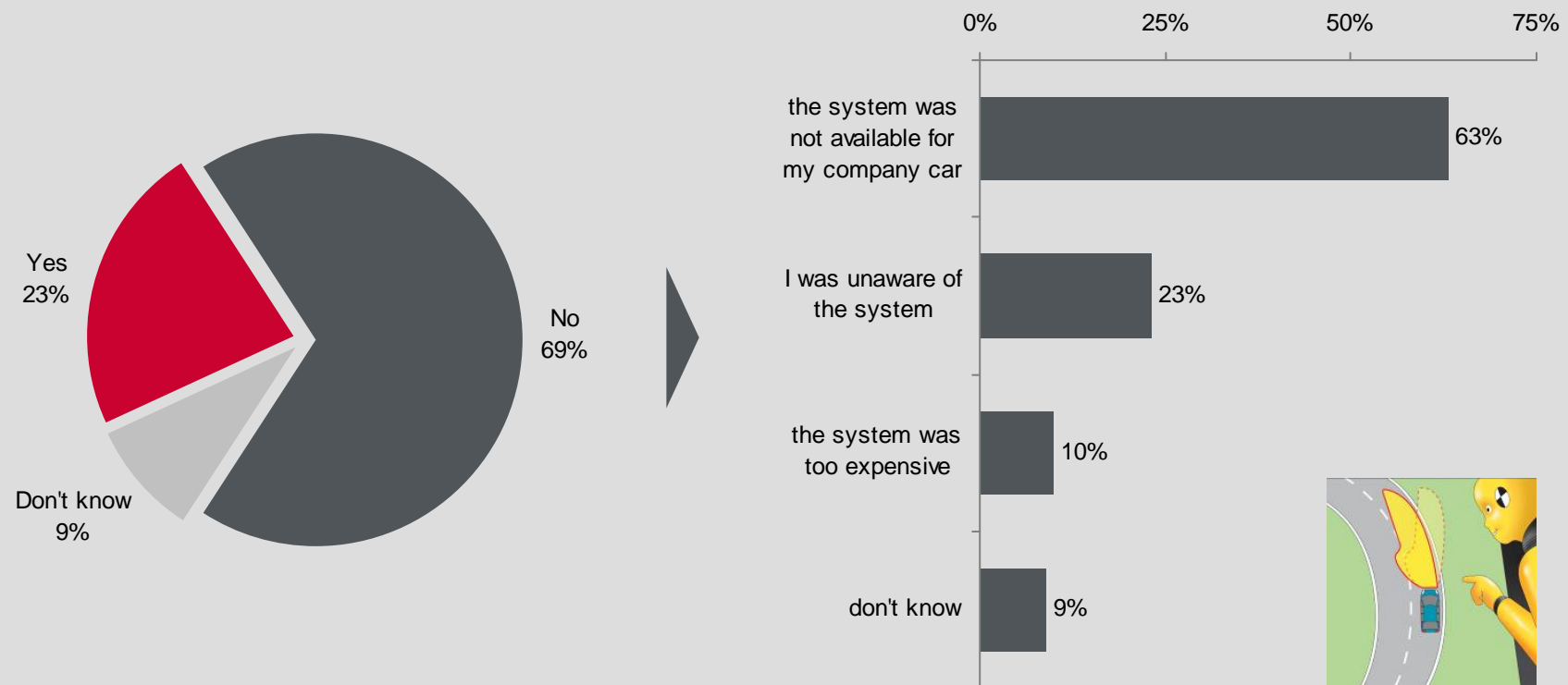


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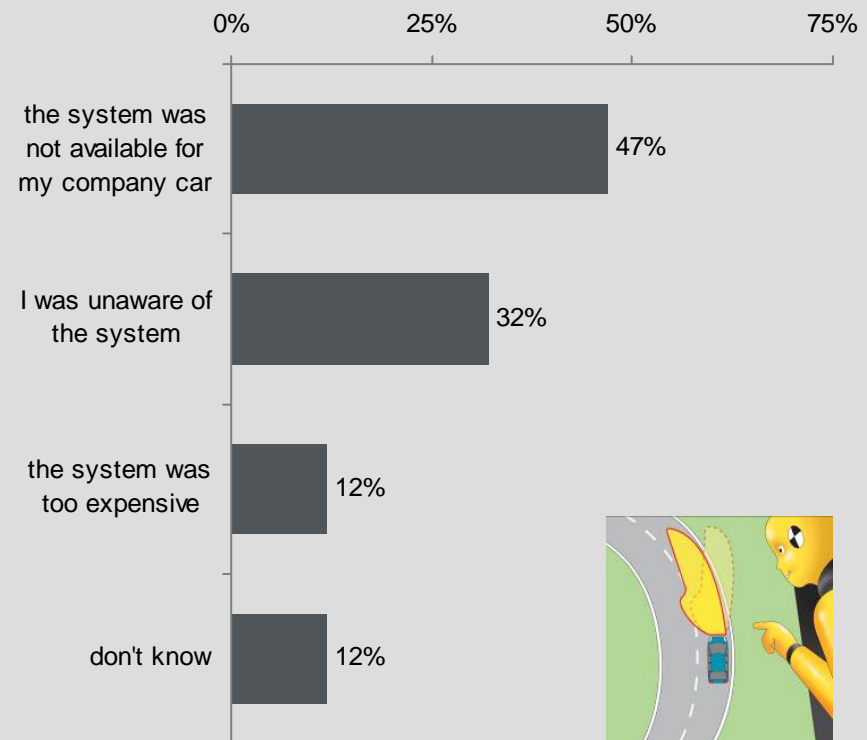
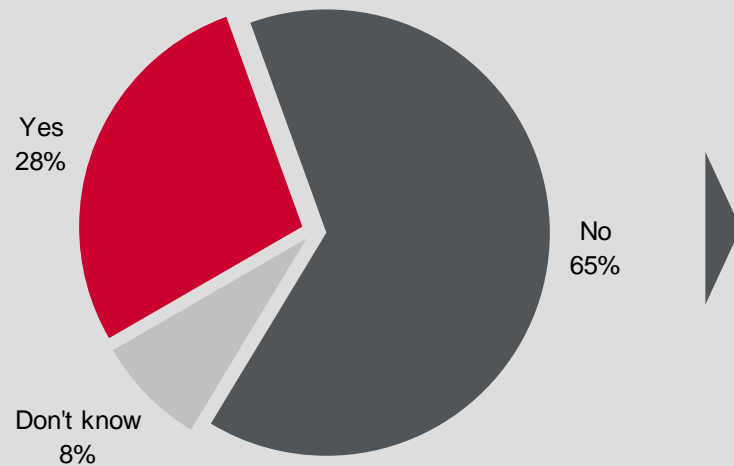
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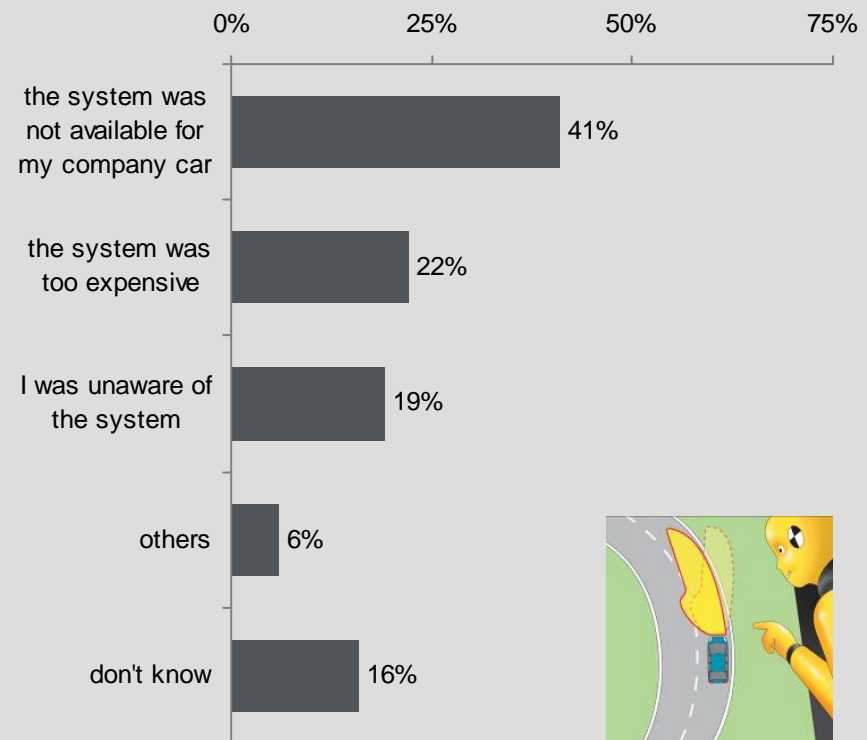
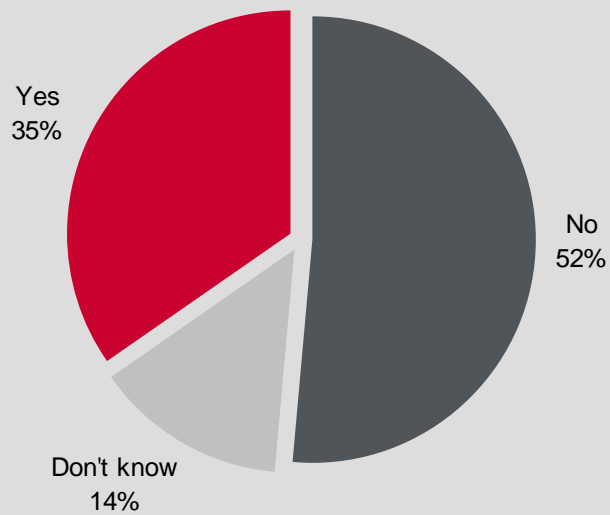
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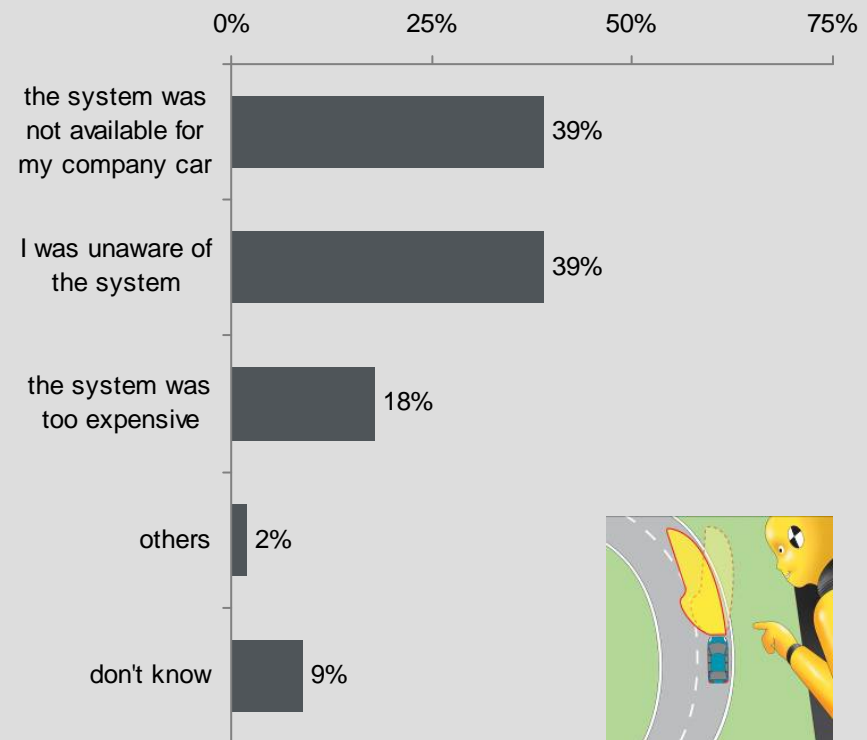
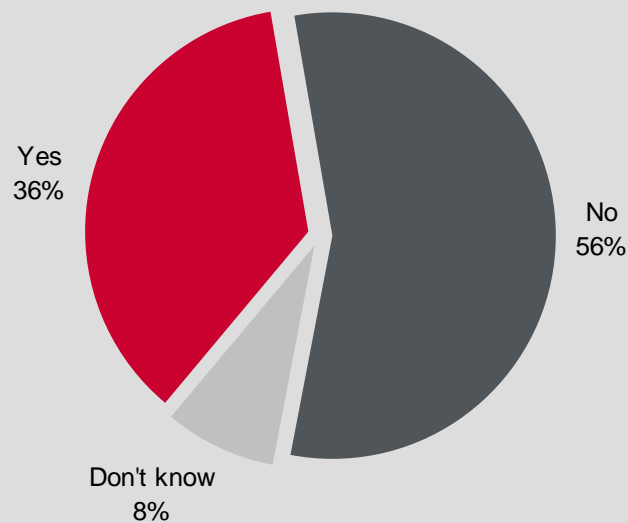
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3.3.6 Adaptive Headlights



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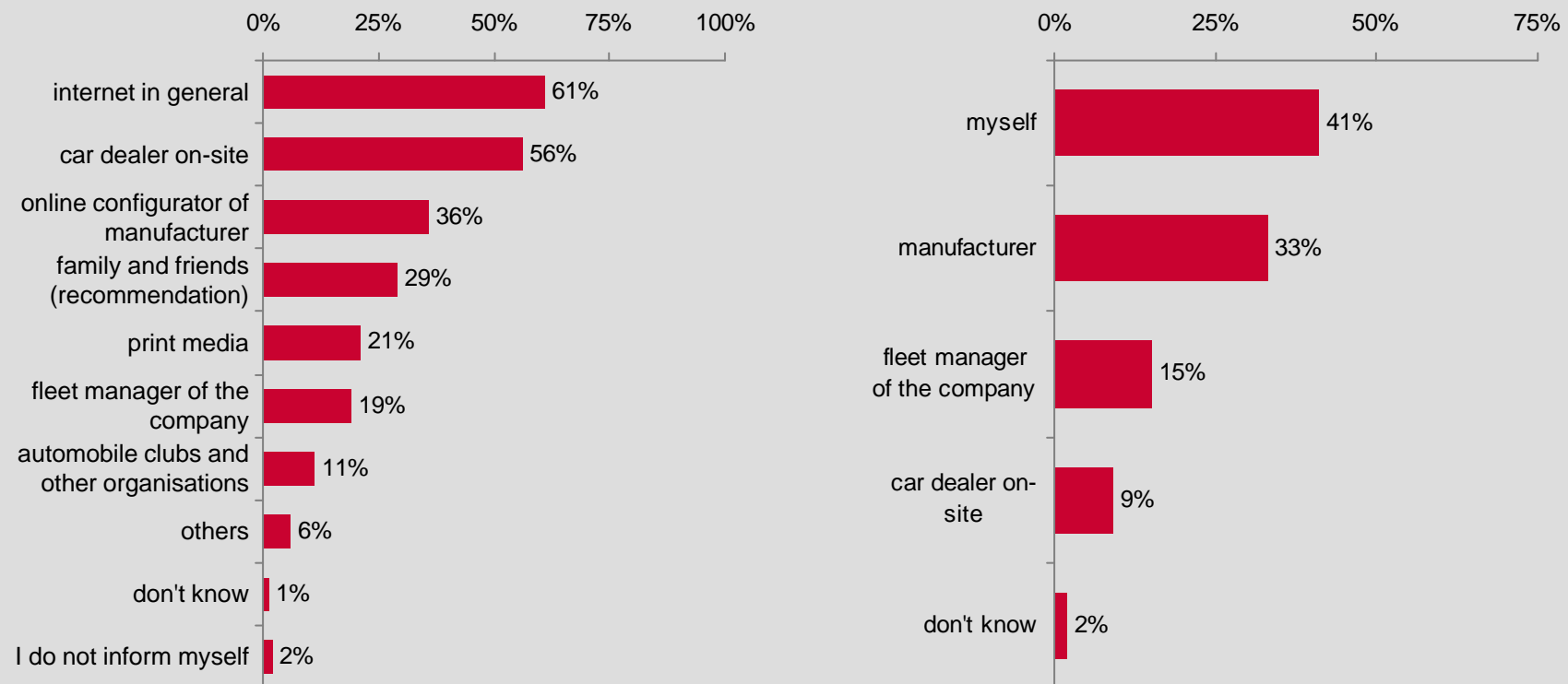
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 - 3.4 Information and responsibility

3. Results

3.4 Information and responsibility

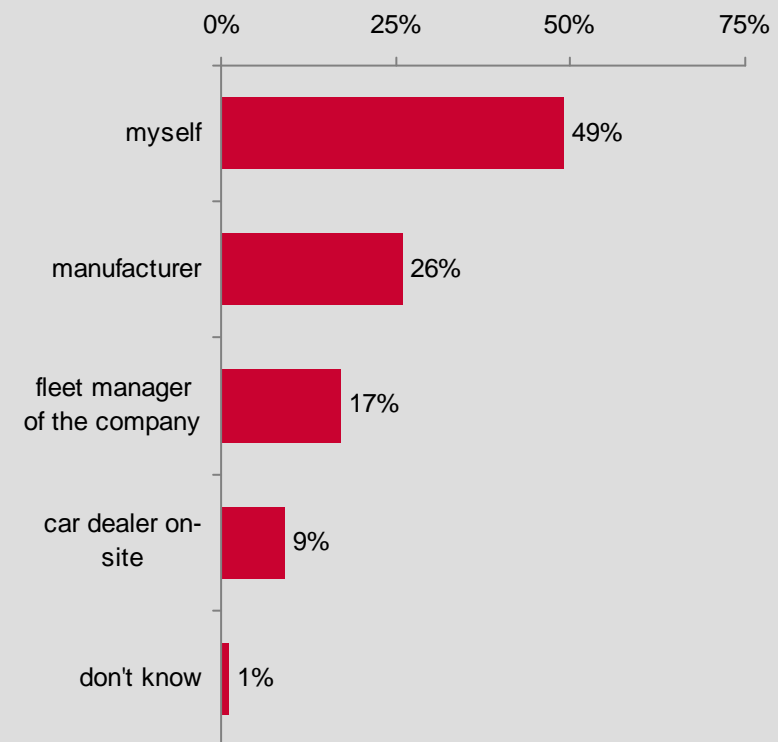
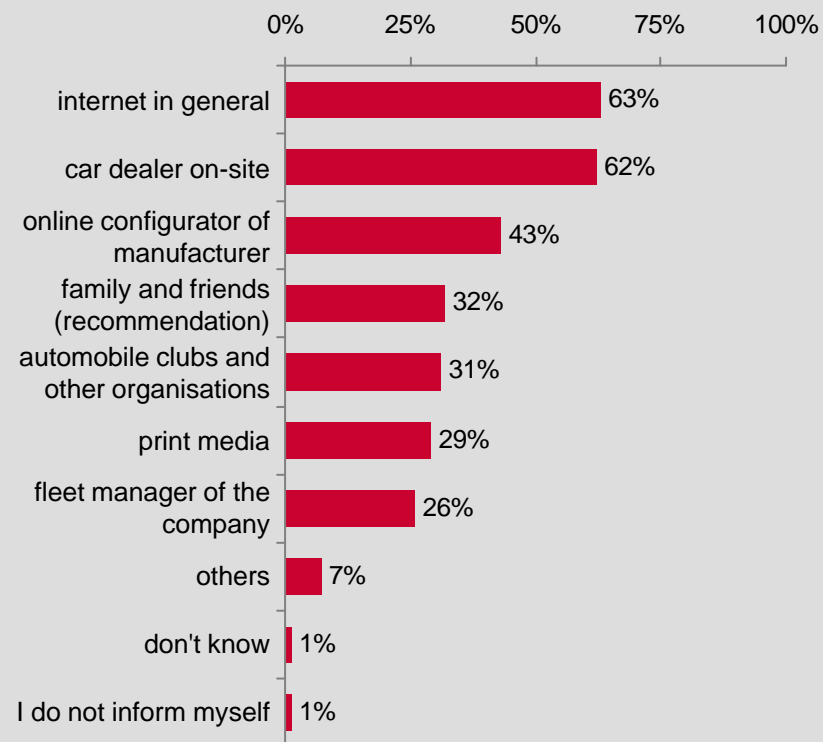
Where do you inform yourself to prepare your decision when choosing a company car? (multiple answers possible)
Who should be responsible to ensure that your company car is a safe car?



3. Results

3.4 Information and responsibility

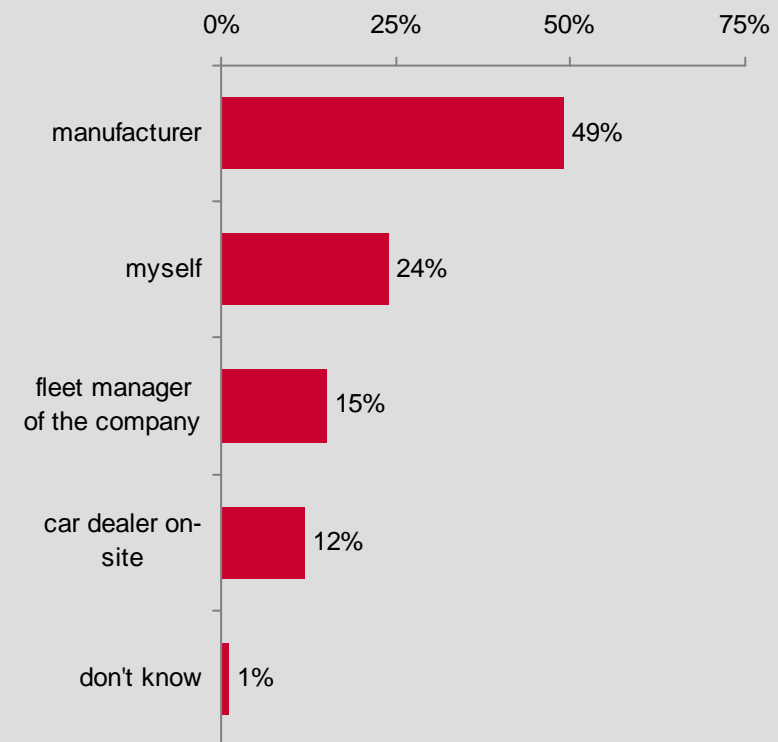
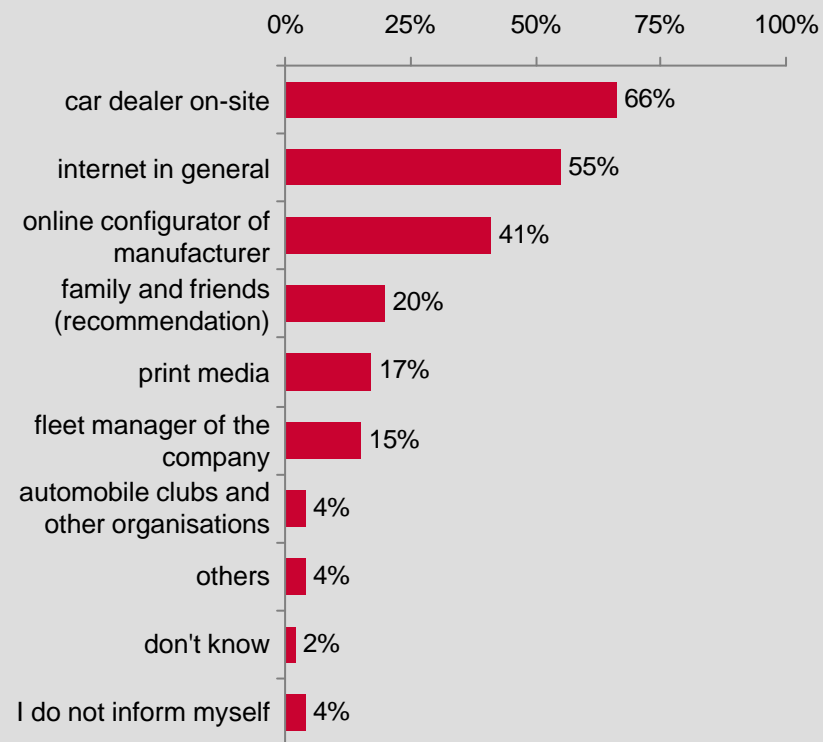
Where do you inform yourself to prepare your decision when choosing a company car? (multiple answers possible)
Who should be responsible to ensure that your company car is a safe car?



3. Results

3.4 Information and responsibility

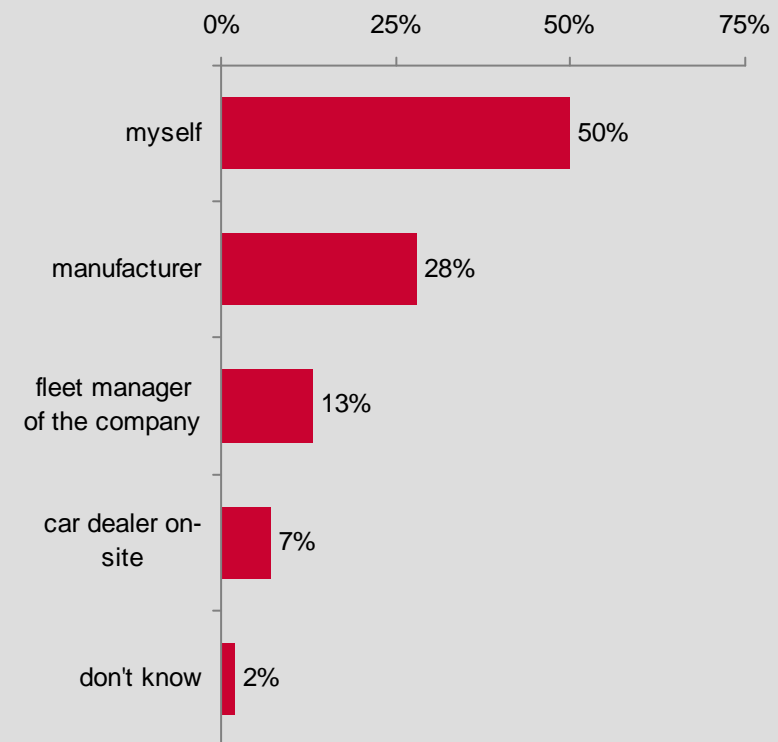
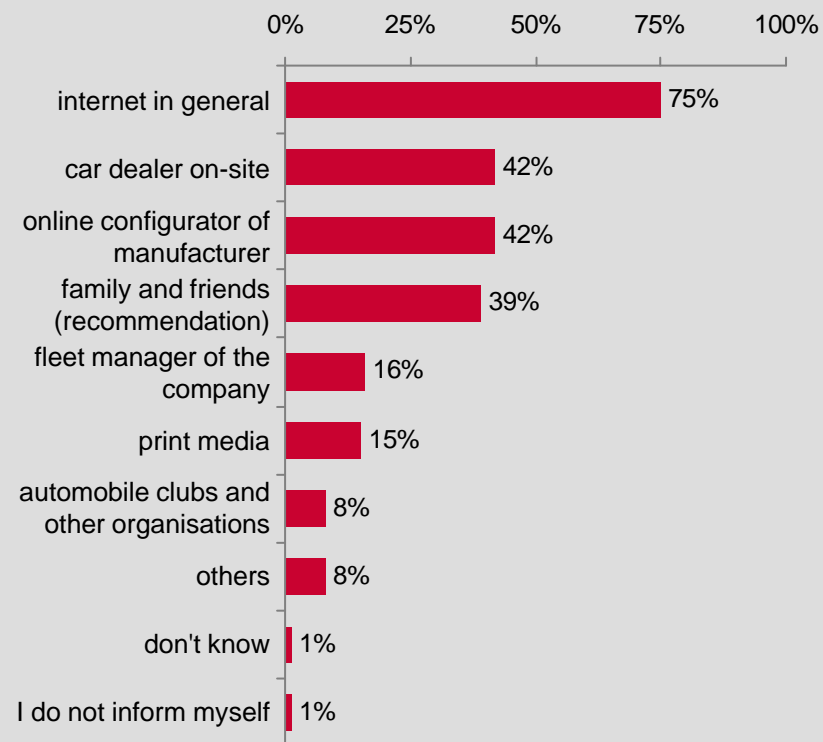
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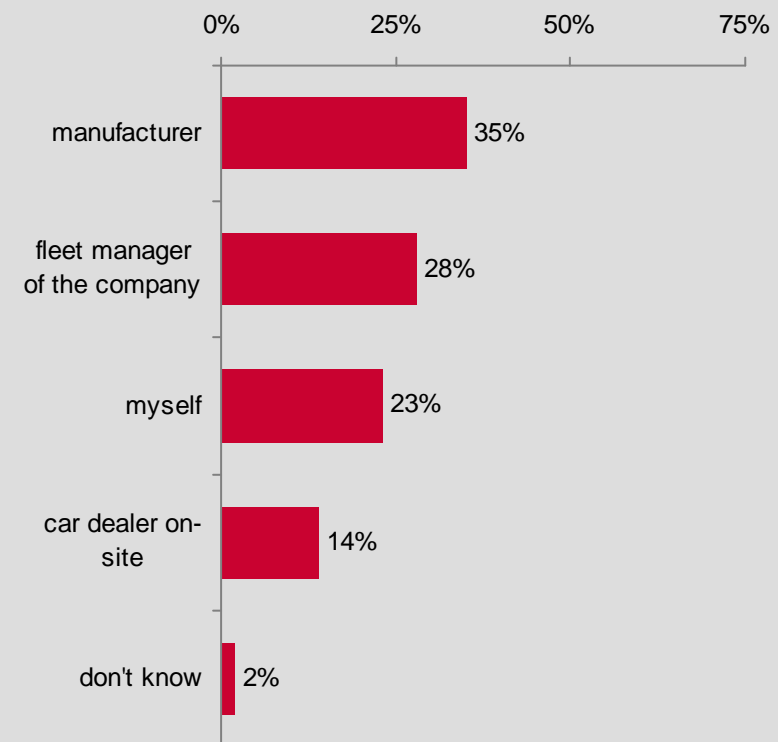
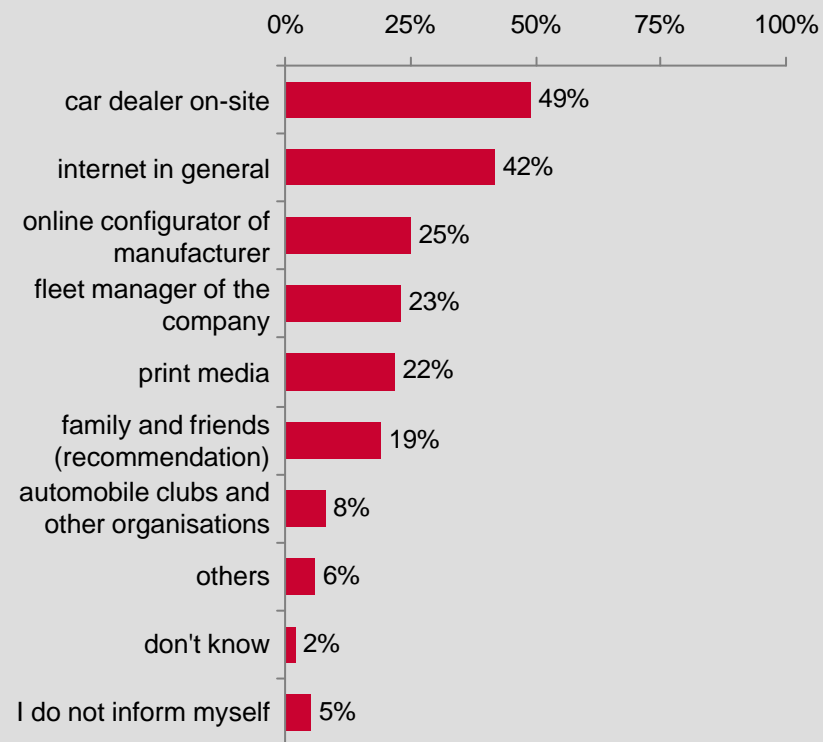
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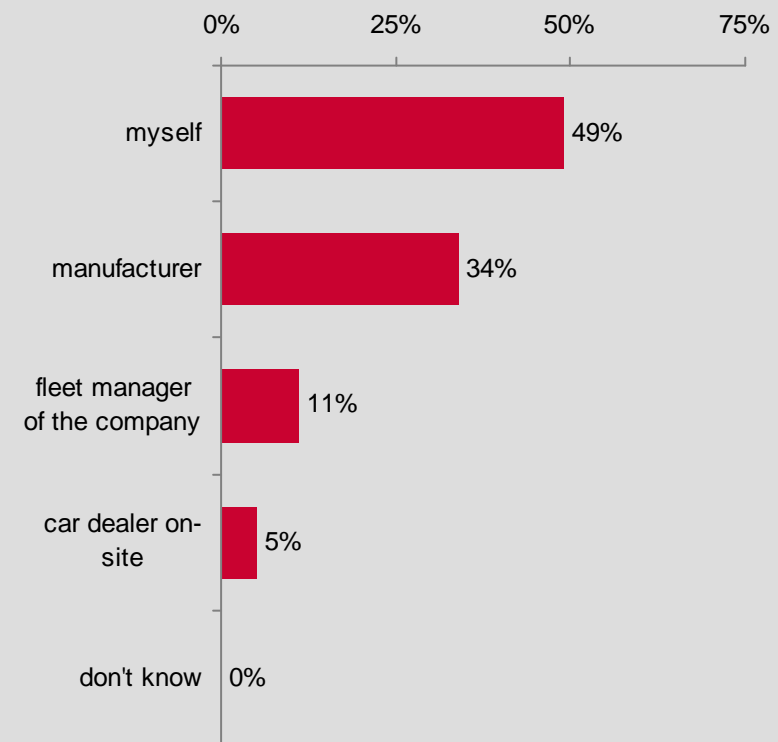
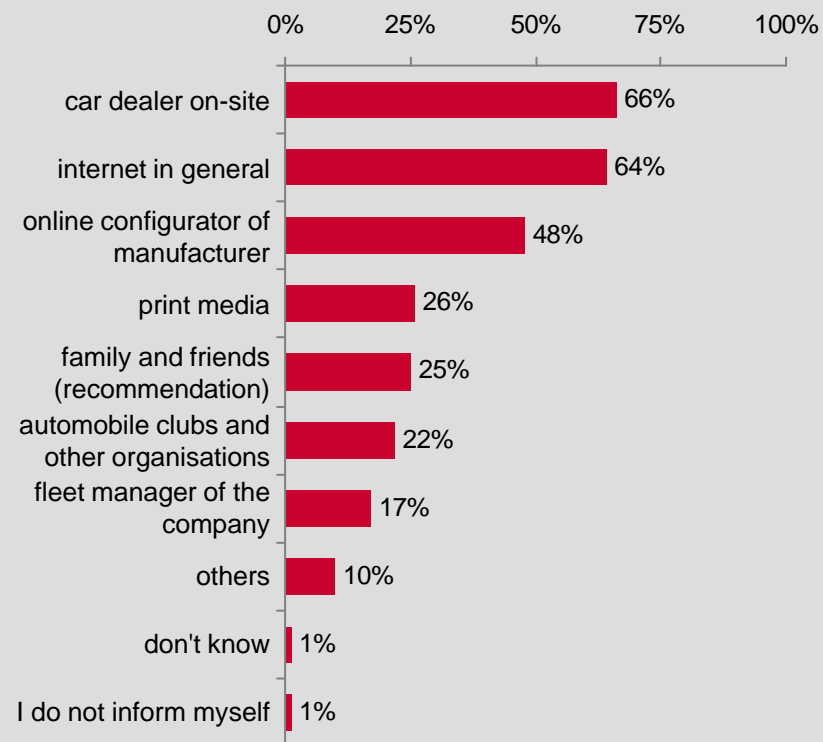
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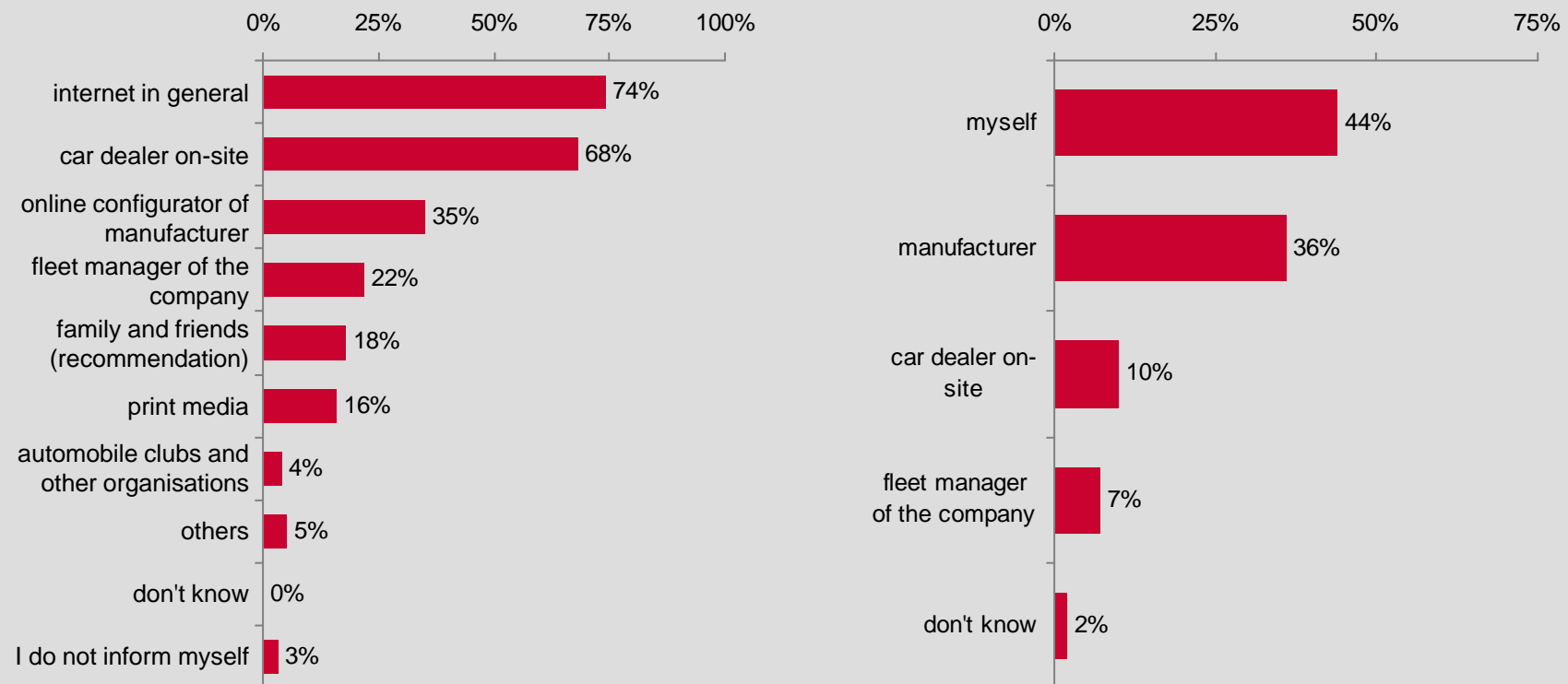
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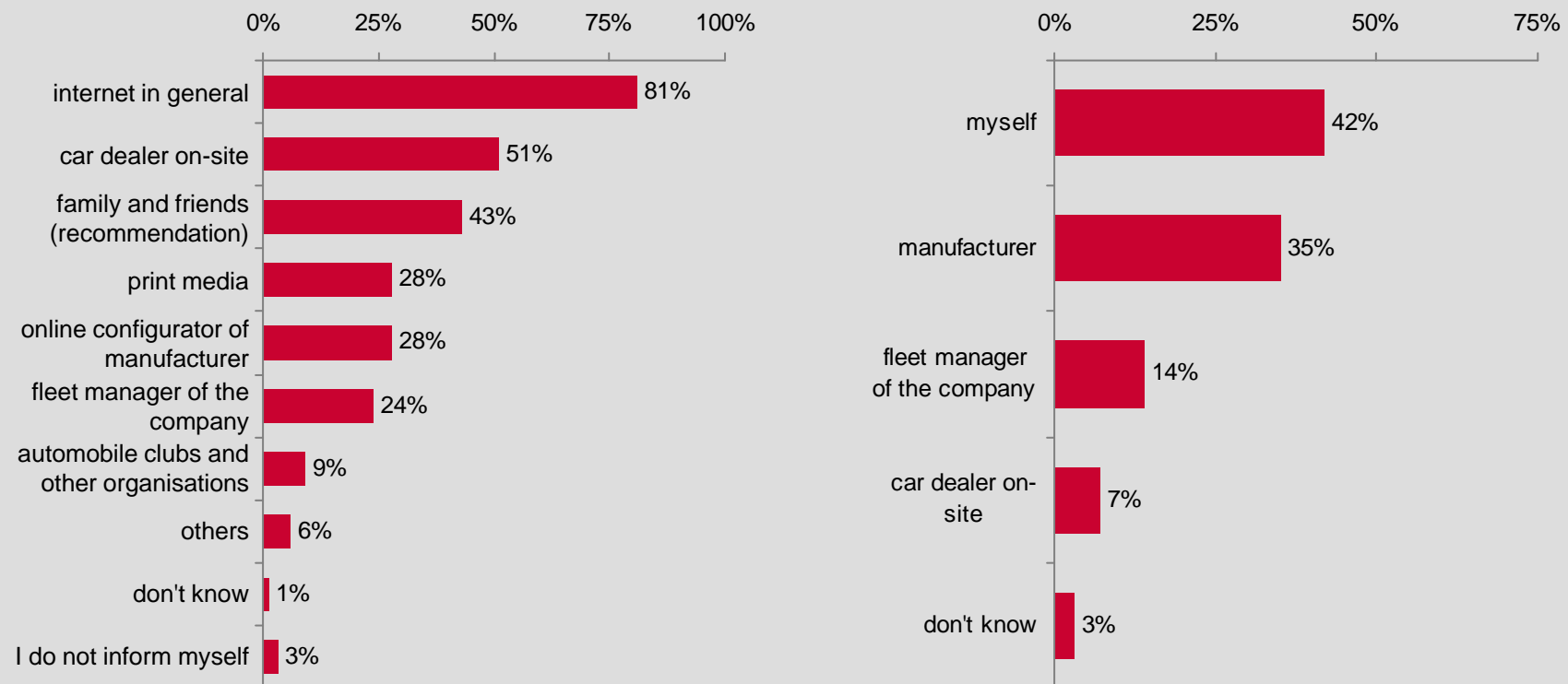
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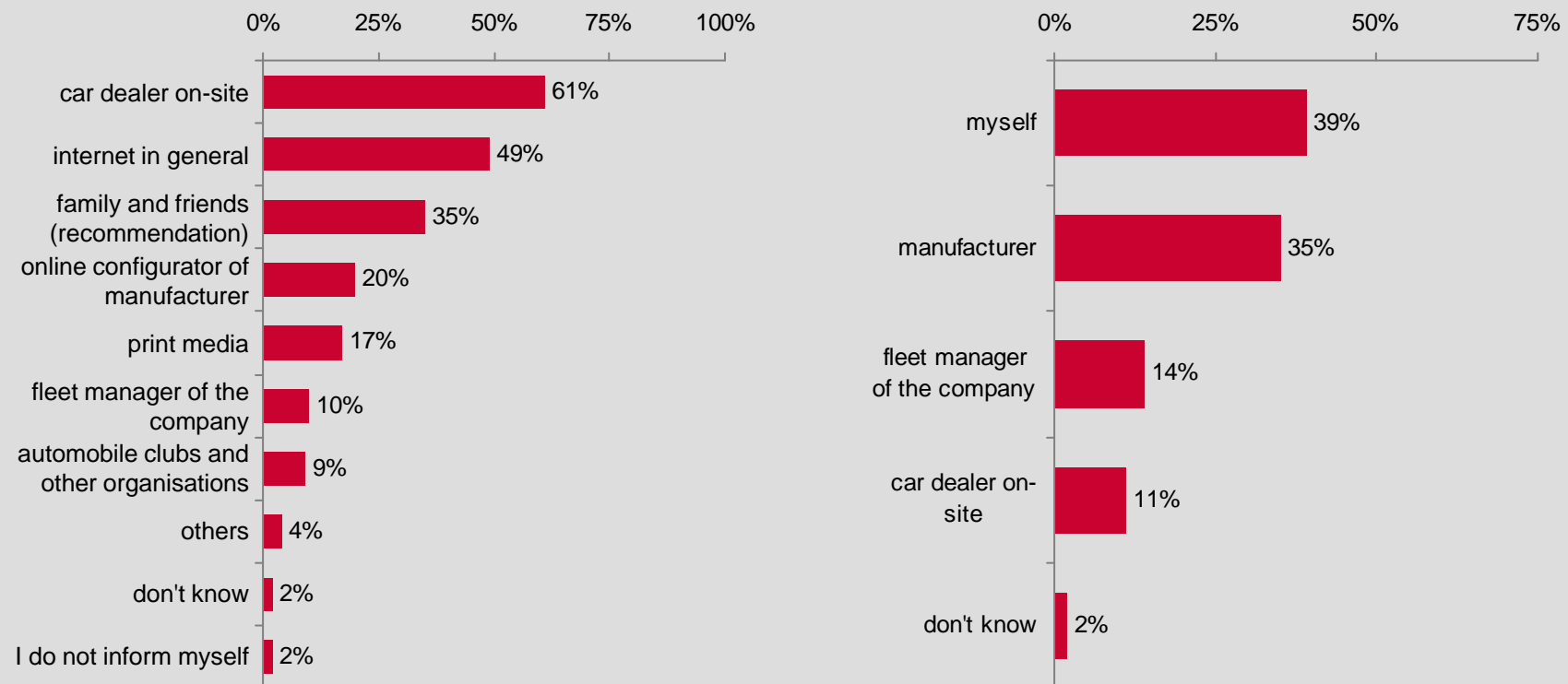


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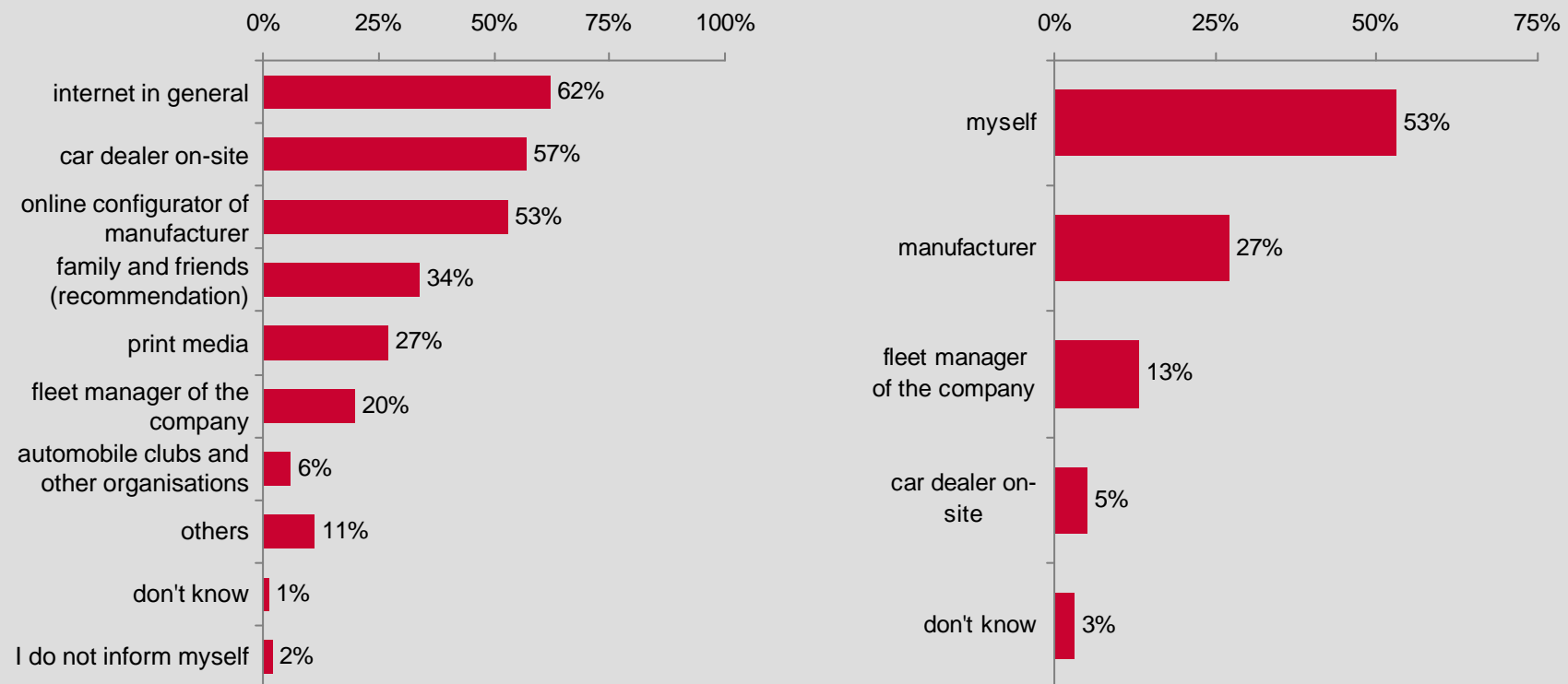


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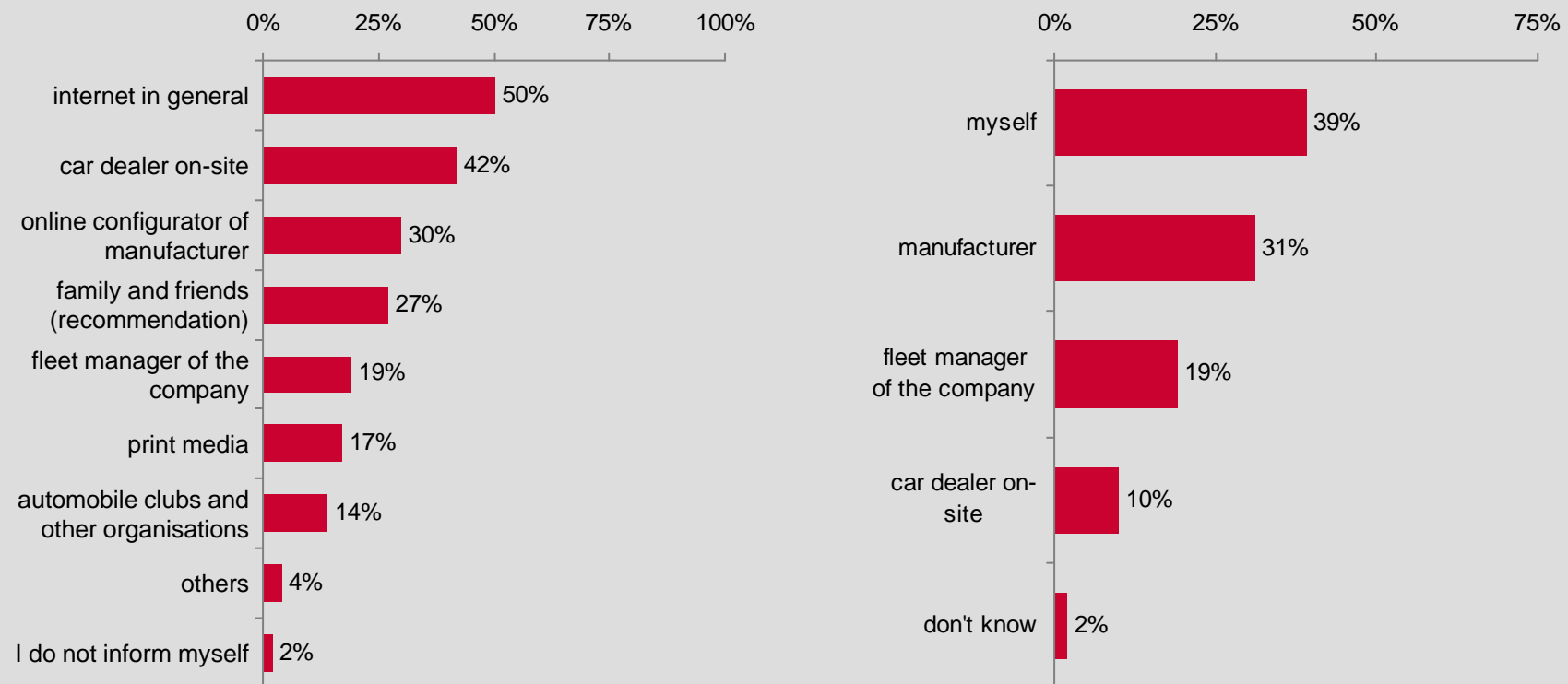


3. Results

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Contact

Your contact person

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Automotive Research