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**FOUR KEY
PILLARS OF
TRANSPORT
SUCCESS IN 2018**
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TRANSPORT 2018: CHALLENGES AND OPPORTUNITIES IN A FAST-CHANGING ENVIRONMENT

The transport sector is one of the most vital elements of the European economy. Employing 10 million people directly and accounting for 5% of Gross Domestic Product across the EU, this irreplaceable step in the supply chain supports a thriving industry.¹

As the European Commission puts it, 'the quality of transport services has a major impact on the people's quality of life.'²

While all of this suggests it's a sector with a healthy future, there are major challenges to contend with such as tachograph data management, monitoring driver behaviour and dealing with fluctuating fuel costs.

Drawing upon the results of our Transport 2018 survey, which sought the opinion and insight of 1,200 leading transport decision-makers from across the European Union, this report breaks down four key elements you need to take care of to move ahead of the competition.



ONE: PROVING COMPLIANCE

MEET THE DEMANDS
OF DIGITAL TACHOGRAPH
REGULATION WITHOUT
DISRUPTING YOUR
BUSINESS

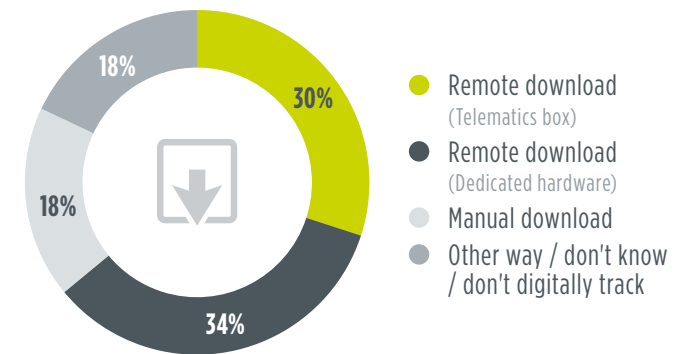
While it's essential for European transport companies to stay compliant with tachograph regulation, it's equally important that meeting these demands does not get in the way of your core business.

The traditional method of manually downloading tachograph data via USB or dongle before carrying the information back to an office is a continuous source of frustration for many transport companies. Vehicles regularly have to diverge from their routes or take long breaks during potential work hours to ensure legislation is being satisfied, while extra man-power is needed to manage and analyse the data. Plus, there's the extra fuel cost and mileage that are incurred throughout this process.

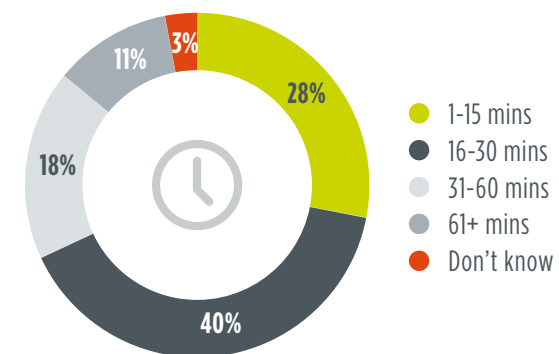
And yet 18% of transport companies across Europe still rely on manual downloads. As we can see, manual downloading is a costly activity in terms of man-hours.

Around 40% of respondents dedicate up to 30 minutes a month per vehicle to this activity while another 18% spend as much as an hour on the task. When one applies this to a fleet of 50 or 100 vehicles, the negative impact on productivity becomes clear.

HOW DO YOU MAINLY DOWNLOAD YOUR TACHOGRAPH DATA?



HOW MUCH TIME PER MONTH, ON AVERAGE, IS SPENT MANUALLY DOWNLOADING TACHOGRAPH DATA FOR EACH VEHICLE?



Even for businesses downloading remotely, keeping up with tachograph regulation can prove costly, stressful and disruptive.

Amongst European transport companies in the last 12 months:

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

And 50% believe it's difficult to get the data they need on driver availability for planning purposes

**YET 18% OF TRANSPORT
COMPANIES ACROSS EUROPE
STILL RELY ON MANUAL
DOWNLOADS, A COSTLY
ACTIVITY**

HOW A FLEET MANAGEMENT SOLUTION HELPS TACKLE TACHOGRAPH REGULATION



**REDUCES THE IMPACT OF
INFRINGEMENTS AND FINES**
by documenting all required
information



**MINIMISES ADMINISTRATIVE
HASSLE**
with remote downloading



MAKES INSPECTIONS EASY
by keeping all your records in
one archive

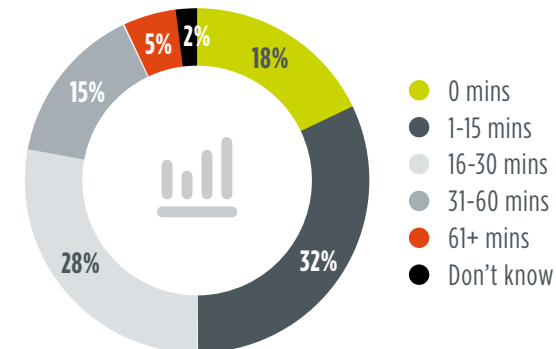
TWO: BOOSTING PRODUCTIVITY

STOP ADMINISTRATIVE
DISRUPTION GETTING IN THE
WAY OF YOUR CORE BUSINESS

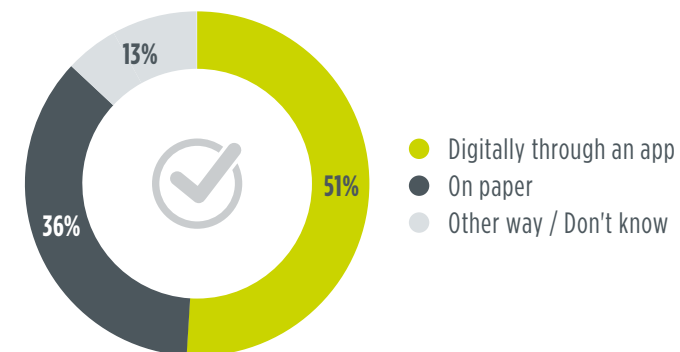
According to a recent TomTom Telematics study, the number one motivating factor for businesses investing in new, disruptive technology is to increase productivity.³ In particular, technology can help to simplify and automate management and administration tasks and free up a business' workforce to concentrate on their own core work.

Take, for example, the analysis of tachograph data. This is a crucial task for any transport operator that wishes to maintain a high level of efficiency but it is also a time consuming one. 32% of all European transport companies dedicate 16-30 minutes per vehicle on analysing tachograph data, while another 28% spend 31-60 minutes on it per month.

HOW MUCH TIME PER MONTH ON AVERAGE IS SPENT ON ANALYZING TACHOGRAPH DATA PER VEHICLE?



HOW DO YOU TYPICALLY MONITOR VEHICLE CHECKS?



It's clear, too, that transport companies are increasingly looking to digitization as a means of countering the distracting nature of some crucial checks and administration. For example, 51% of European transport companies now monitor vehicle checks and maintenance using an application, with the traditional paper method now favoured by only 36%.

While these are just two examples, across your fleet management operation, you'll find countless tasks that could be simplified by investing in new technology. As Rob O'Byrne, founder of the Logistics Bureau, puts it, 'If you're still using a paper-based method for route planning or managing with rudimentary software, you're leaving money on the table.'⁴

IF YOU'RE STILL USING A
PAPER-BASED METHOD
FOR ROUTE PLANNING
OR MANAGING WITH
RUDIMENTARY SOFTWARE,
YOU'RE LEAVING MONEY ON
THE TABLE

HOW A FLEET MANAGEMENT SOLUTION HELPS BOOST PRODUCTIVITY



REDUCES ADMINISTRATION

so your workforce stays
longer on the road



SPEEDS UP DECISION MAKING

with all remaining driver
times visible at-a-glance



SIMPLIFIES YOUR OPERATION

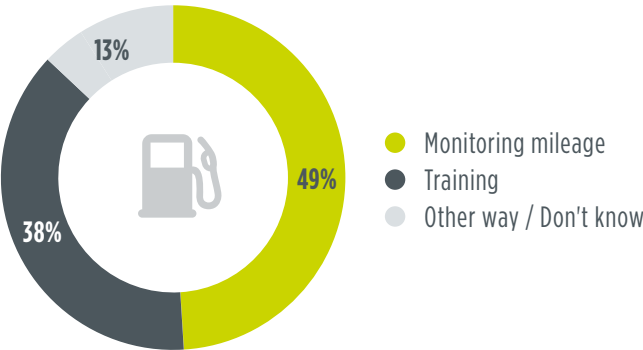
with a user-friendly, cloud-
based platform



THREE: REDUCING FUEL COST

MANAGING ONE
OF YOUR HIGHEST
OPERATING COSTS

HOW DO YOU TACKLE FUEL WASTAGE WITH REGARDS TO DRIVING BEHAVIOR?

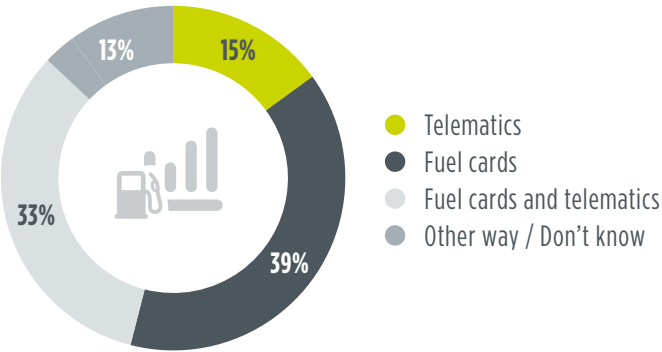


Given that the transport sector relies on oil for 94% of its fuel, it's not surprising to see that oil costs are a constant source of frustration in the industry. In PriceWaterhouseCoopers research, 75% of transport CEOs cited price swings in the cost of oil as one of their biggest operational concerns.⁵

Then there is the green issue. With the European Union seeking to reduce harmful emissions by around 66% by 2050, there's continuous pressure upon the sector to control its carbon footprint. So, how are transport companies tackling this issue?

While fuel cards are still relied upon by most transport companies, a fairly sizeable number combine fuel cards with telematics to maintain fuel efficiency.

HOW DO YOU TYPICALLY MONITOR LOST FUEL AND FUEL EFFICIENCY?



A FAIRLY SIZEABLE NUMBER OF TRANSPORT COMPANIES COMBINE FUEL CARDS WITH TELEMATICS TO MAINTAIN FUEL EFFICIENCY

HOW A FLEET MANAGEMENT SOLUTION HELPS YOU MANAGE YOUR FUEL USAGE

LOWERS FUEL WASTAGE
by monitoring driver behaviour and offering coaching

GETS YOU TO YOUR CUSTOMER QUICKER
with reliable truck navigation routes

INCREASES THE NUMBER OF JOBS
with more effective routing and planning

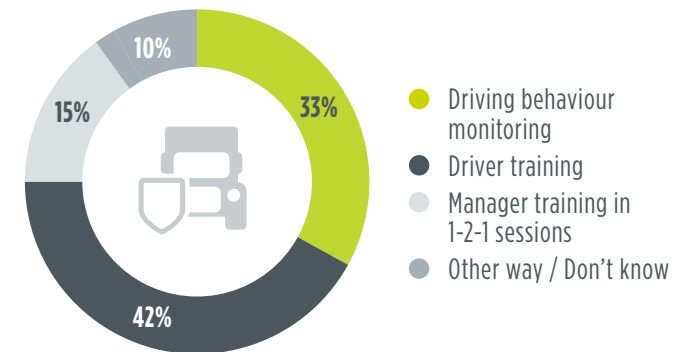
FOUR: STAYING SECURE

KEEPING SAFE ON
AND OFF THE ROAD

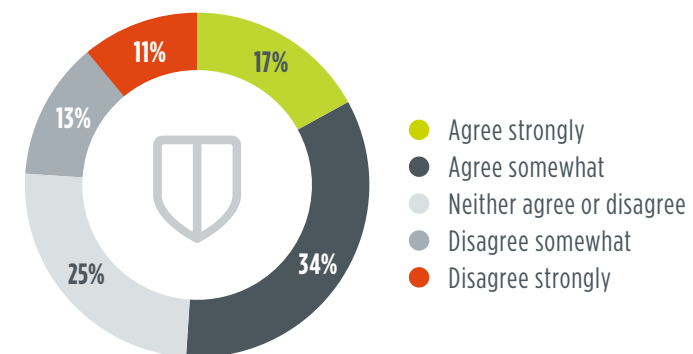
Whether it's the way you manage data or the way your drivers work on the road, all parts of a transport operation demand airtight security. Minimising risk exposure is vital though, again, it shouldn't have to come at the expense of productivity. Our research showed Europe's transport decision makers concerned about all aspects of security and taking steps to stay both protected and compliant.

Encouraging road safety begins with the driver. The most popular methods for ensuring drivers maintain a safe standard of behaviour behind the wheel are monitoring behaviour and training. Both of these activities are made much simpler by technology. A fleet management solution offers a closer and more accurate view of how drivers are performing and gives drivers themselves more encouragement to improve. It's unsurprising to see these methods favoured above the comparatively time-consuming choice of the 1-2-1 management session.

HOW DO YOU ENSURE YOUR DRIVERS ARE DRIVING SAFELY?



I'M CONCERNED ABOUT HOW GDPR REGULATION MIGHT AFFECT THE HANDLING OF TACHOGRAPH DATA



Like every other sector in European business, transport is concerned with GDPR (General Data Protection Regulation), the recently implemented EU legislation on data protection and privacy for individuals within the European Union and European Economic Area. In our survey, 34% of respondents agreed somewhat that they are concerned with how GDPR might affect the handling of tachograph data, while 17% agreed strongly. Also notable is the fact that a quarter of transport decision makers neither agree nor disagree with the statement. This could suggest that, even at this point, many are still unsure of how, precisely, GDPR will impact them.

Either way, as data legislation becomes stricter, it's crucial to be sure whoever you're trusting to handle and manage your data is fully compliant with the law and storing your information to the highest security standards.

IT'S CRUCIAL TO BE SURE WHOEVER YOU'RE TRUSTING TO HANDLE AND MANAGE YOUR DATA IS FULLY COMPLIANT WITH THE LAW AND STORING YOUR INFORMATION TO THE HIGHEST SECURITY STANDARDS

HOW A FLEET MANAGEMENT SOLUTION IMPROVES SECURITY



REDUCES THE CHANCE OF ACCIDENTS

using HCV specific and pre-set routes



MOTIVATES DRIVER IMPROVEMENTS

through coaching modules and driver communication



HELPS YOU STAY COMPLIANT

with all regulation such as GDPR

ABOUT THE TRANSPORT 2018 SURVEY

This research was conducted among 1200 fleet decision makers across Europe. This included 200 respondents in each of the following countries: UK, France, Germany, Italy, Spain and Poland. The research was conducted via an online and mobile survey in collaboration with OnePoll.

Want a full rundown of the results?
Contact **david.martin@tomtom.com**

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