



Eyes on the road...

Market research:
an exploration
of business
driver behaviour

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Market research:

The road ahead: an exploration of business driver behaviour

The financial, legislative and human impact of driving behaviour among mobile workers can be considerable. Consequently, improvement of driver performance now represents a significant business challenge.

There is an increased recognition of this fact, thanks to the efforts of energy and road safety charities, government organisations and solutions providers in raising awareness. But the extent to which companies and drivers have acted on this remains unclear.

This study explores and assesses the behaviours and current attitudes of European light commercial vehicle drivers.

The research reveals that many mobile workers are not driving in the most fuel efficient manner and are prepared to compromise road safety. All the while there is considerable scope for businesses to reverse this potentially very costly conduct.

Only 21 per cent of companies currently provide training to help employees drive more safely and efficiently, while only 23 per cent use technology to monitor driving performance.

The final analysis considers why there is a need to strategically address a fundamental element of fleet operational efficiency and safety, which is currently being overlooked.

Research methodology

The research was conducted by TomTom among business drivers from operational fleets in five countries across Europe.

Operational fleets were defined as vehicles used for the delivery of goods or services (predominantly LCVs).

The research was conducted among 722 operational fleet employees in total: 150 in the United Kingdom, 150 in Germany, 122 in the Netherlands; 150 in France and 150 in Spain.

In order to qualify for the research, respondents had to be a company employee driving a vehicle for business purposes at least three days a week. The research was conducted at selected petrol and service stations in each country among a cross section of industries.



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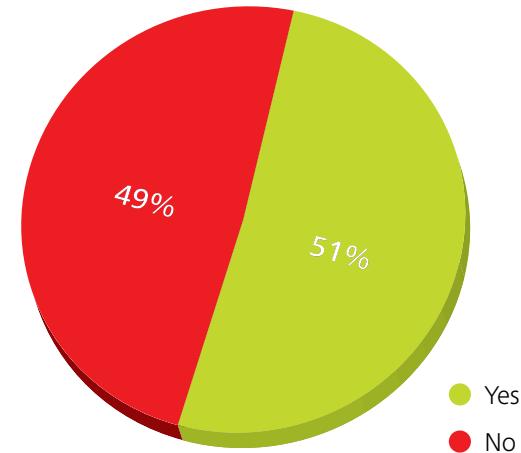
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Do you drive more carefully and fuel efficiently when driving your personal rather than your business vehicle?

Combined results

More than half (51%) of all drivers admit to driving more carefully and fuel efficiently when using their personal vehicle as opposed to their company vehicle. Perhaps unsurprising due to the presence of several factors affecting driver attitudes to their personal vehicles.

Primary among those are fuel costs, with high prices at the pump meaning drivers are more likely to drive fuel efficiently in order to save themselves money. Cutting maintenance costs will also be a key consideration, while the absence of work pressures also results in a more cautious mindset.

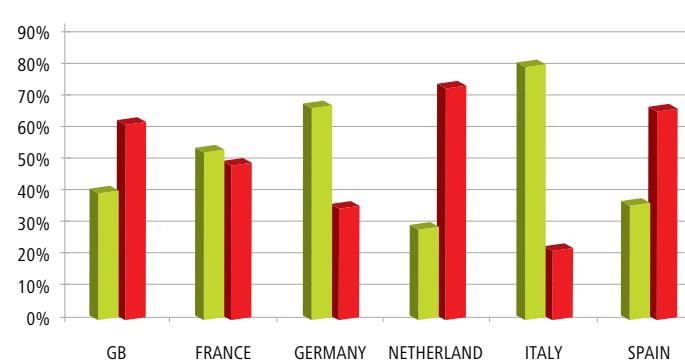


Country-specific results

There are some intriguing disparities between the different European nations. The Dutch appear to drive the most conscientiously at work, with only 28 per cent of respondents claiming to drive more carefully and fuel efficient in their personal vehicles.

A minority of Spanish (35 per cent) and British (39 per cent) also take more care while driving for work purposes.

Yet the reverse is true for the remaining three nations, particularly Italy, where 79 per cent of drivers admit adopting a safer, more efficient driving style in their personal vehicle.



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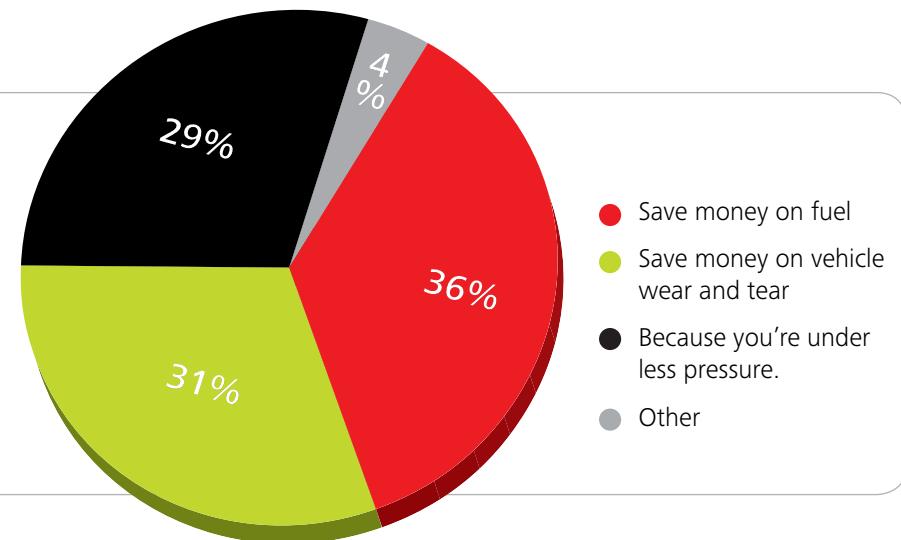
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Q2

What is the main reason you drive more carefully and fuel efficiently in your personal vehicle?

UK-specific results

The primary reason given by UK drivers for driving more carefully and fuel efficiently in their personal vehicles is, perhaps unsurprisingly, a desire to save money on fuel. More than a third of respondents (36 per cent) cite this as their primary motivating factor, while 31 per cent say they want to save money on vehicle wear and tear. A further 29 per cent claim the absence of working time pressures allows them to drive more carefully and fuel efficiently in their personal vehicles.



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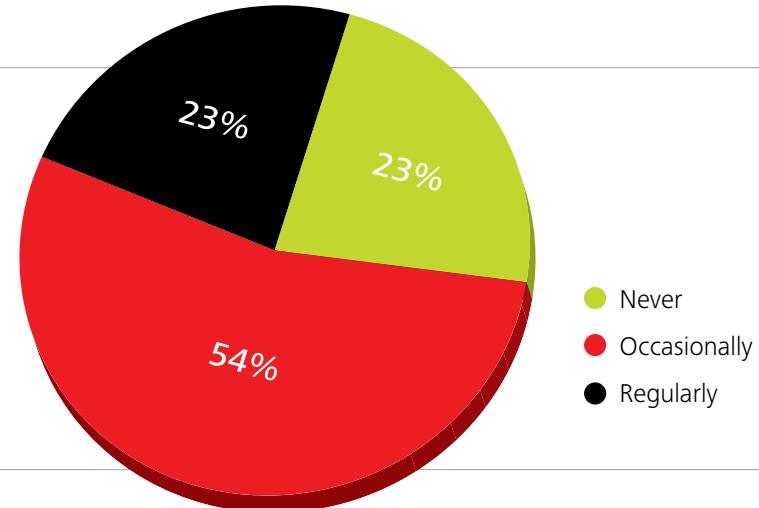
Q3

How frequently do you break the speed limit when driving for work purposes?

Combined results

A large majority of drivers admit to speeding while driving for work purposes. More than three-quarters (77 per cent) break the speed limit, with 23 per cent doing so regularly.

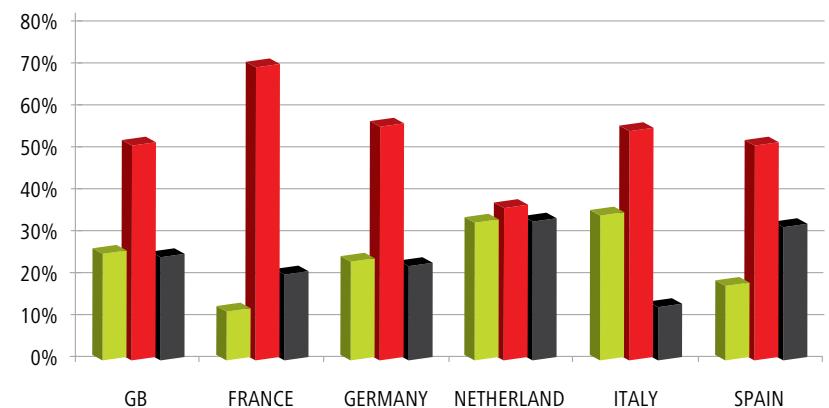
Less than a quarter say they have never broken the speed limit.



Country-specific results

Drivers across Europe admit to speeding but Italians claim to be the most cautious, with 34 per cent saying they never speed, closely followed by the Dutch (32 per cent).

Interestingly, however, the Netherlands are also responsible for the most frequent infringements, as 33 per cent admit speeding regularly. France has the highest proportion of drivers who admit to speeding - only 11 per cent never do it.



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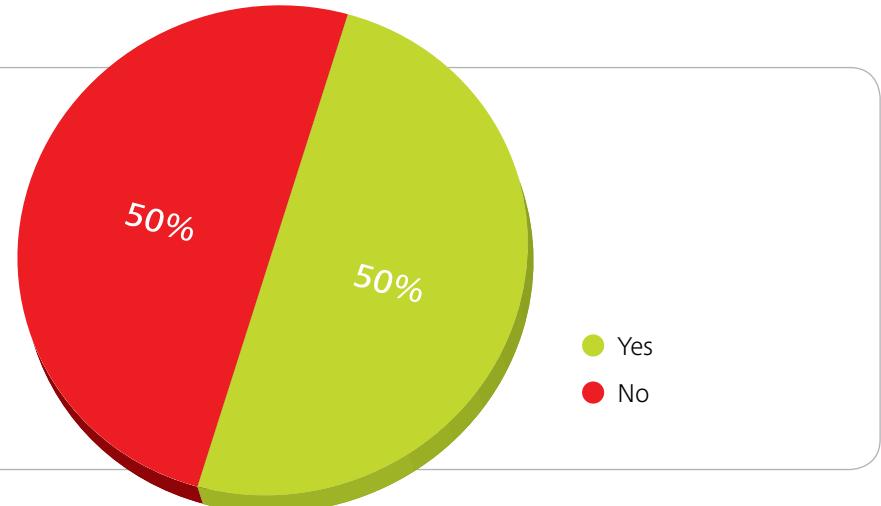
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Q4

Do time pressures make you more likely to speed and take risks on the road while driving for work purposes?

Combined results

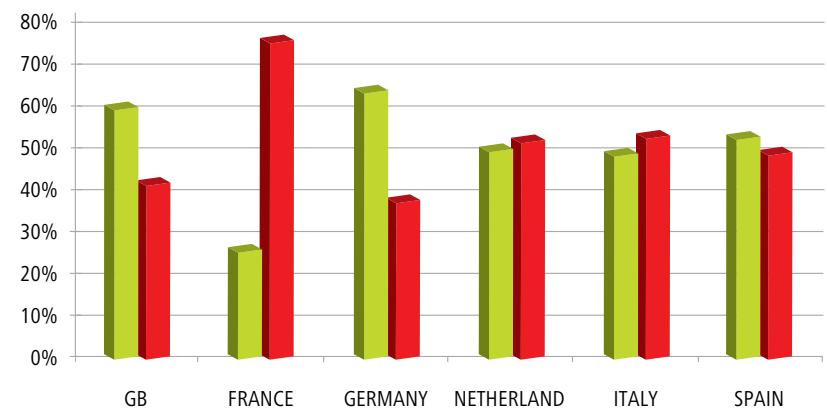
This question provides an interesting insight into the effect of working time pressures on drivers. Half of all respondents believe such pressures cause them to take more risks out on the road.



Country-specific results

Time pressures have the biggest impact in Germany, making 63 per cent of drivers more likely to speed or take risks. They are closely followed by Great Britain (59 per cent) and Spain (52 per cent).

Italy and Spain are less likely to be affected by time pressures but the French clearly lead the way, with only a quarter of drivers allowing their driving style to change for the worse.



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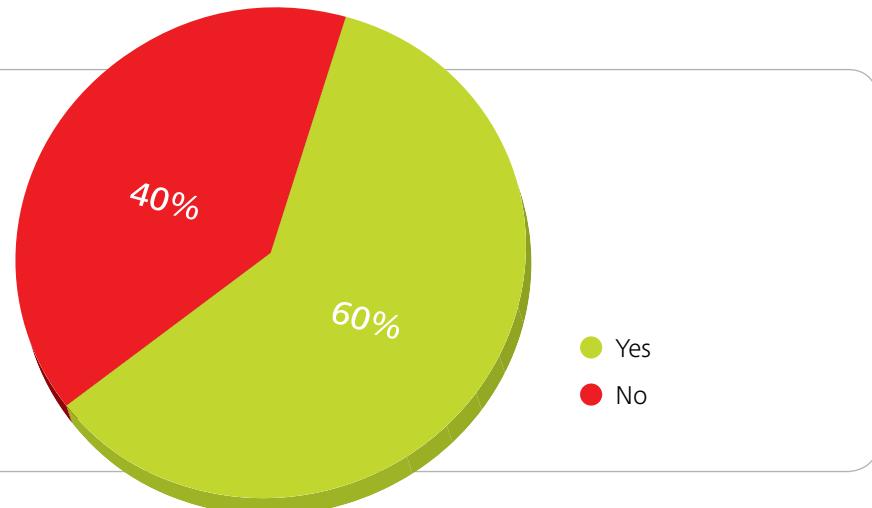
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Do you feel you are a better driver than other road users (that don't drive for work purposes)?

Combined results

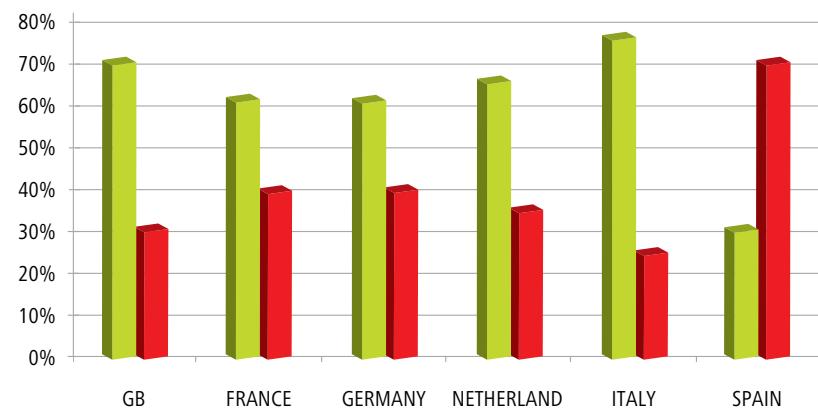
Working drivers are generally confident in their own ability. A significant majority of those surveyed (60 per cent) believe they are better drivers than other road users who are not operating a vehicle for work purposes.



Country-specific results

Italian drivers are the most confident, with 76 per cent claiming to be superior drivers to other road users, closely followed by Great Britain, where the figure is 70 per cent.

Spanish drivers are the most humble about their own abilities. Spain is the only nation where the majority of working drivers (70 per cent) did not believe they were better than other road users.



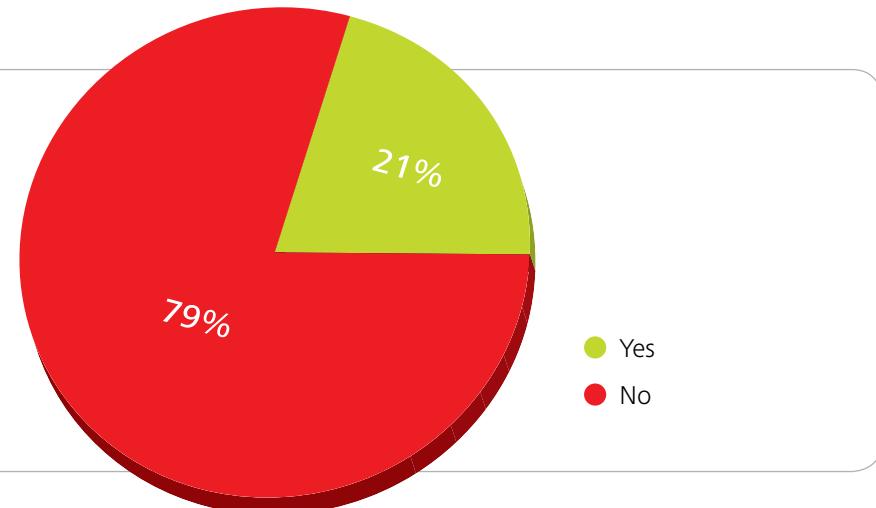
Q6

Has your company ever provided you with training for safer more fuel efficient driving?

Combined results

Considering the impact driving style can have on safety and fuel costs, it is perhaps surprising to see so few companies offer their drivers training in this area.

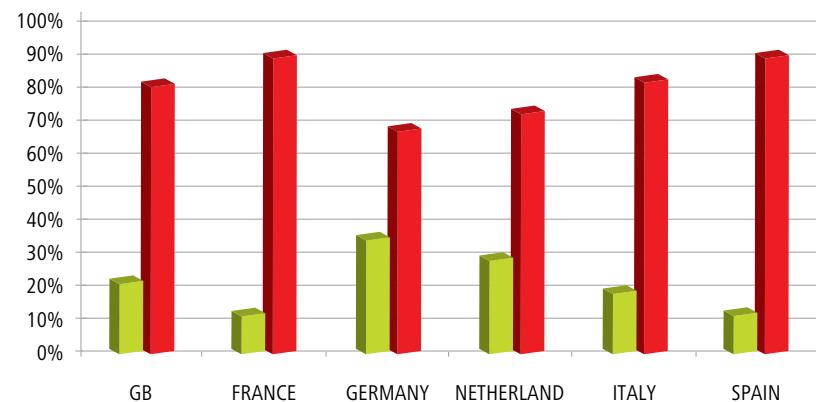
Almost four-fifths (79 per cent) say they have never received formal training to help improve their performance behind the wheel.



Country-specific results

France and Spain appear to be the worst when it comes to offering driver training to employees, with only 11 per cent of drivers having received such help.

Training is most prevalent in Germany, where 33 per cent of drivers have benefitted from it, closely followed by the Netherlands (28 per cent).



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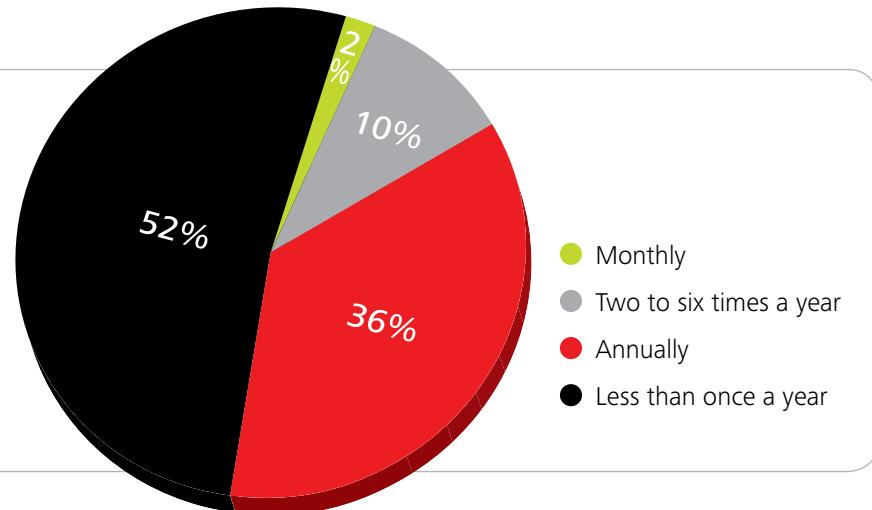
Q7

If your company provides you with driver training, how frequently does it do so?

Combined results

Even where driver training is offered, 88 per cent receive it once a year or less. More than half (52 per cent) of those who have been given training receive it less than once a year, with a further 36 per cent only doing it annually.

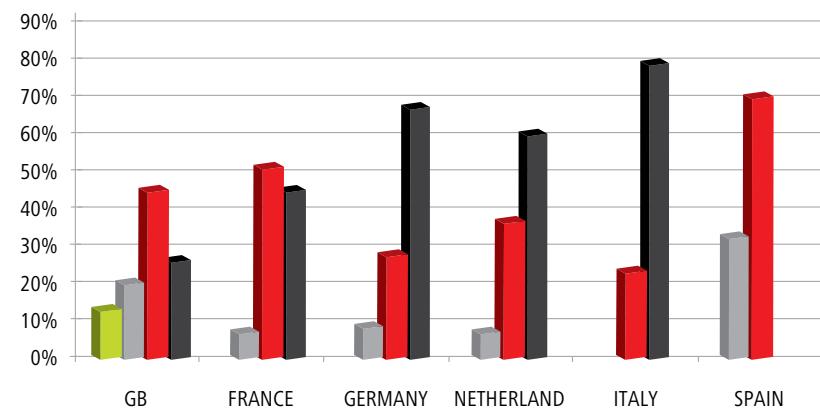
Just two per cent of all respondents say they receive training on a monthly basis.



Country-specific results

Great Britain appears to be the only country to offer monthly training, where it is received by 12 per cent of respondents.

Although a high proportion of German drivers receive training, the vast majority (66 per cent) claim it occurs less than once a year. It is a similar situation in the Netherlands, where 59 per cent receive it less than once a year and 35 per cent annually.



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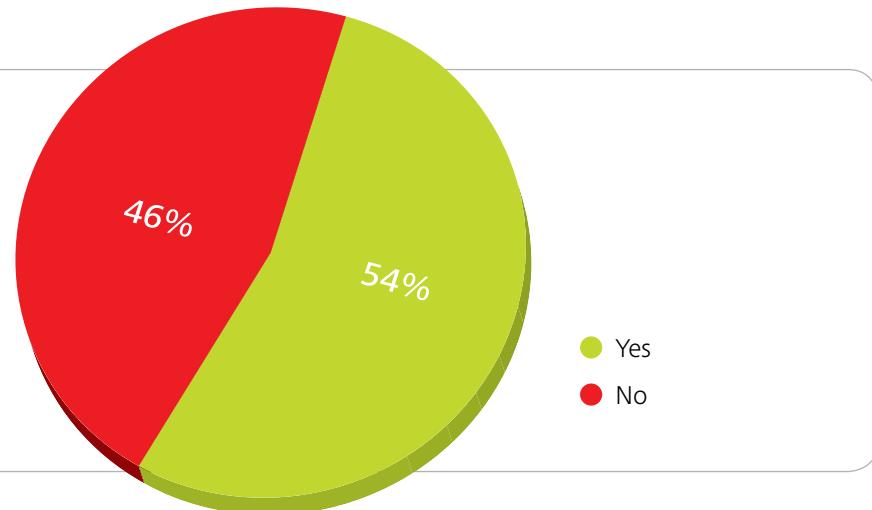
Q8

If your company does not provide you with driver training, would you welcome it to help you drive more safely and efficiently?

Combined results

Despite their employers often failing to offer training for safer, more fuel efficient drivers, the majority of drivers actually appear to be in favour of it.

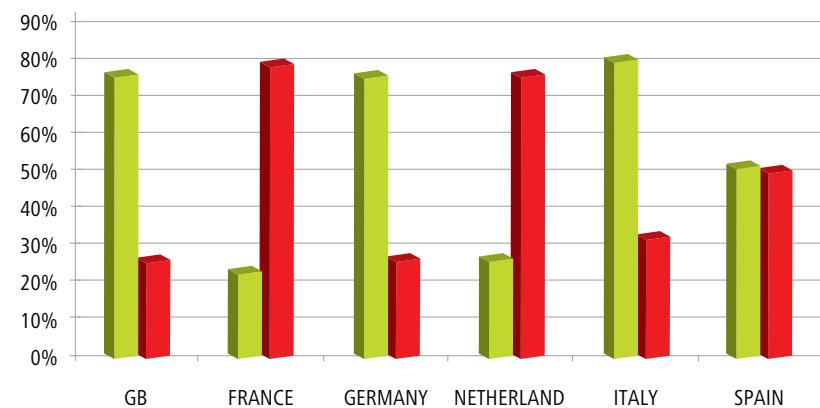
Fifty-four per cent say they would welcome the offer of training.



Country-specific results

Three-quarters of drivers in Great Britain and Germany would welcome training, while the Italians are also overwhelmingly in favour (69 per cent).

Drivers in Spain sit on the fence but those in France and the Netherlands appear to be strongly opposed to training, with 78 per cent and 75 per cent respectively claiming they would not welcome it.



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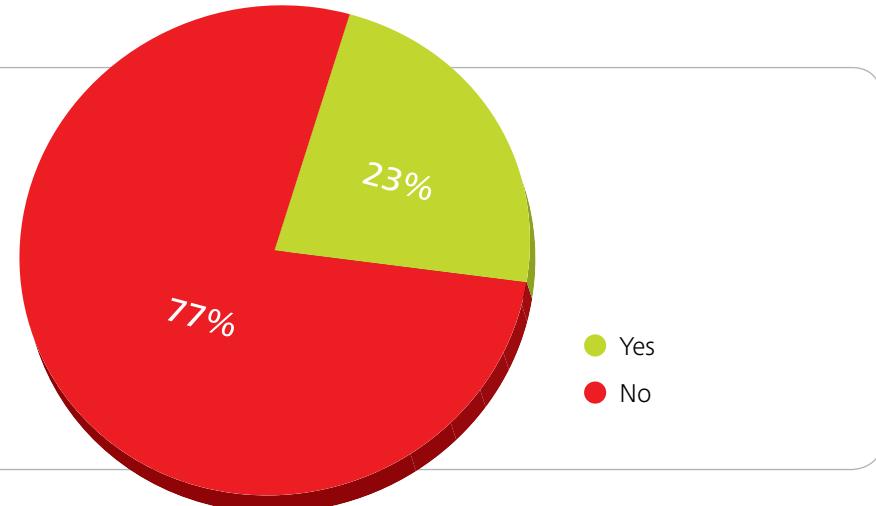
Q9

Does your company use technology to monitor your driving performance and fuel efficiency?

Combined results

Continuing the trend set in driver training, a large majority of companies do not appear to operate technology to monitor driving performance and fuel efficiency, despite its potential impact on safety and cost.

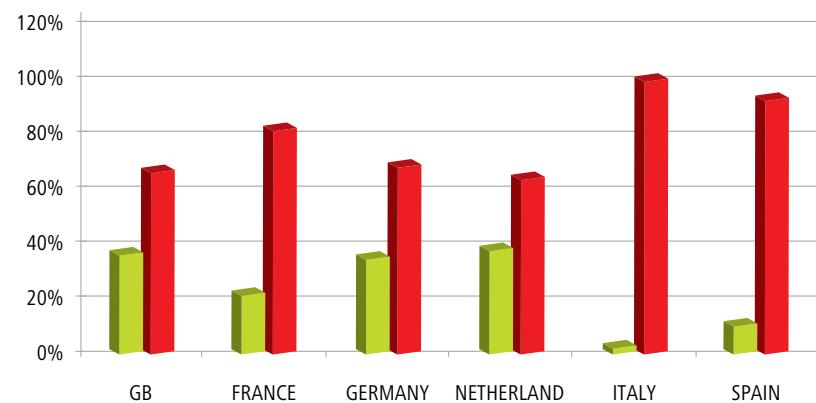
Only 23 per cent of drivers say their employers have such systems in place.



Country-specific results

The Netherlands appears to be the most technologically advanced country, where 37 per cent of drivers work for companies operating driver performance monitoring technology.

Great Britain (35 per cent) and Germany (33 per cent) follow closely behind but Spain (nine per cent) and Italy (two per cent) appear to be lagging well behind.



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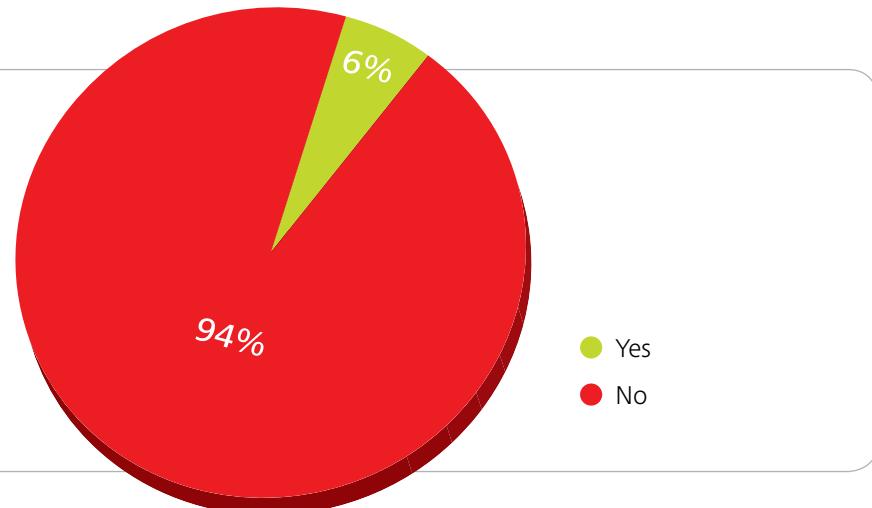
Q10

Does your company offer you incentives to improve your driving performance?

Combined results

With only a minority of companies offering driver training or operating performance monitoring technology, it is perhaps unsurprising to find even fewer run driver incentive schemes.

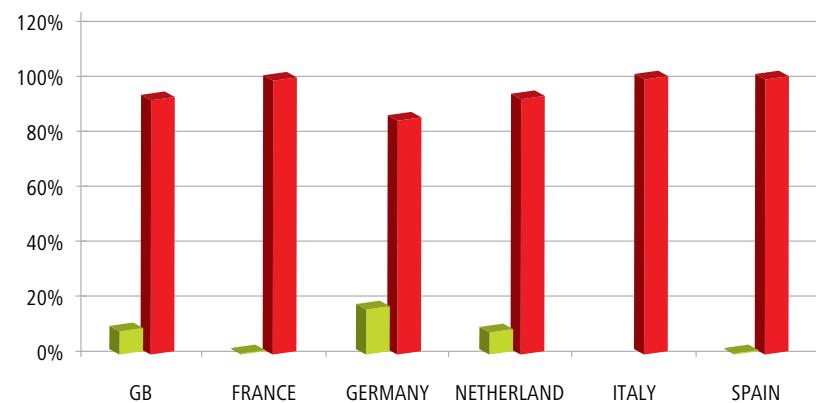
Only six per cent of all drivers are offered incentives as a means of improving their performance on the road.



Country-specific results

Incentives are most common in Germany, where 16 per cent of drivers claim their companies operate such schemes.

Remarkably, no Italian drivers are offered incentives to improve their performance and such initiatives are almost non-existent in France and Spain too, where only one per cent of drivers have been given the opportunity to earn performance-related rewards.



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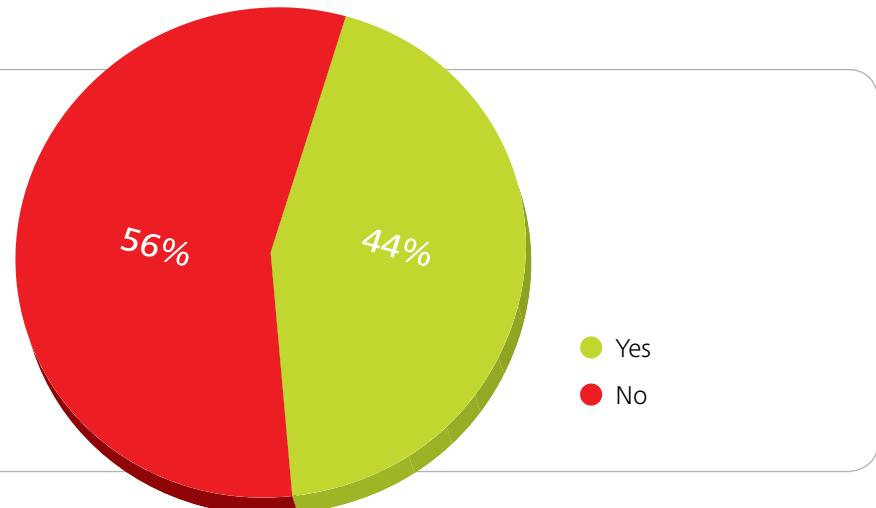
Q11

Do your employers reprimand you when you are fined for speeding, have high fuel consumption or when you are guilty of other driving incidents that have cost them money?

Combined results

Although few drivers are rewarded for strong performance, more are reprimanded when they are guilty of speeding, high fuel consumption or driving incidents that have cost their company money.

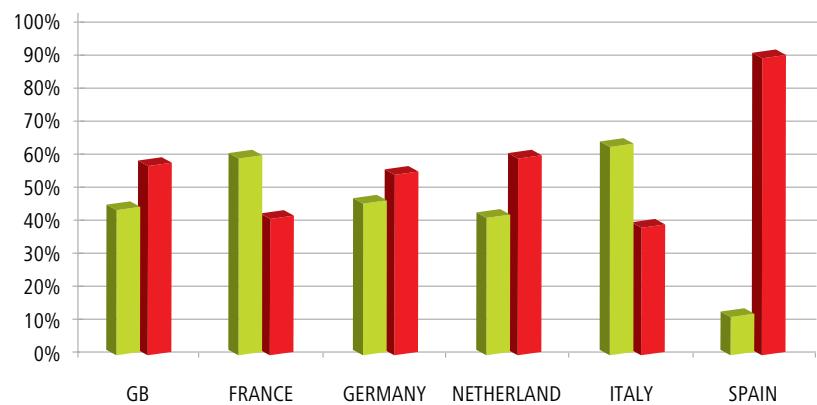
Yet, surprisingly, still only 44 per cent of drivers are reprimanded for such unwanted behaviour, with the majority escaping punishment.



Country-specific results

Italian companies appear to be the strictest, with 62 per cent of their drivers claiming to be reprimanded for poor driving performance.

The situation is similar in France, where 59 per cent face action, but at the other end of the spectrum, only 11 per cent of Spanish drivers are reprimanded for driving practices that cost their companies money.



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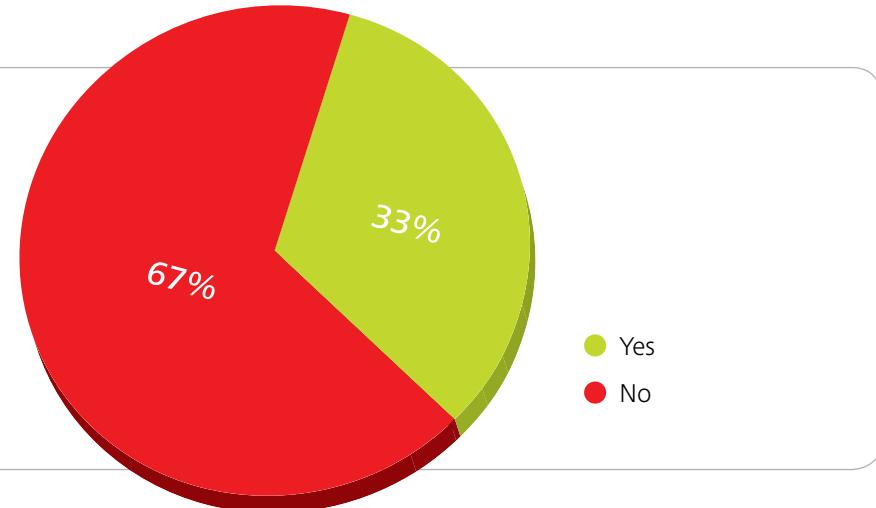
Q12

Does your company pay speeding fines on your behalf?

Combined results

It is not surprising to discover the majority of firms across Europe will not pay speeding fines on behalf of their employees.

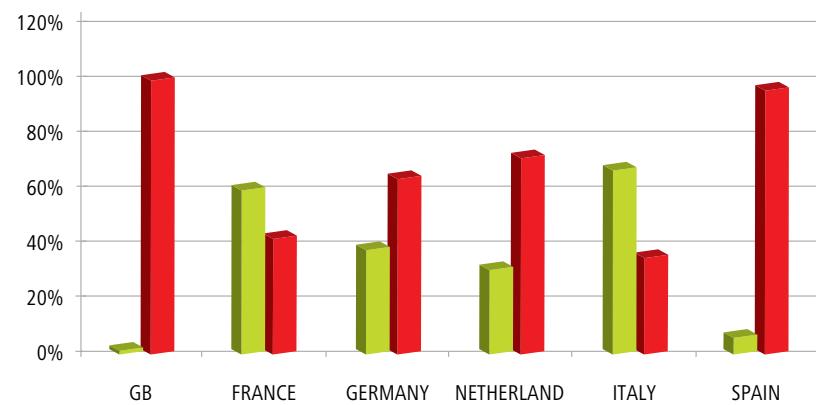
A third of those surveyed say speeding fines incurred in work vehicles are paid for by their employers.



Country-specific results

British companies appear least willing to foot the bill for their employees. Only one per cent of drivers from Great Britain say speeding fines are paid on their behalf and it is a similar situation in Spain (five per cent).

However, companies across the rest of Europe are less strict, particularly in Italy, where 66 per cent of drivers have fines paid for them.



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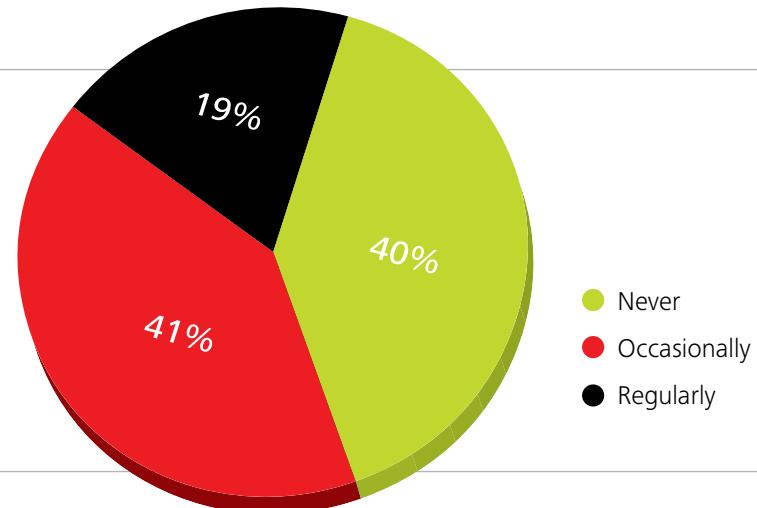
Q13

How frequently do you text from your mobile phone while driving for work purposes?

Combined results

Using a mobile phone to text while driving has become a significant problem across Europe, so it is a concern to see the majority of drivers (60 per cent) do it while on work duty.

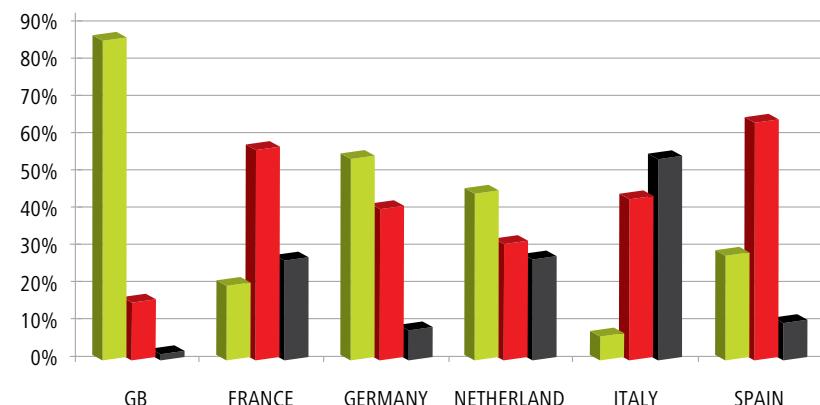
A shocking 19 per cent even admit to regularly texting while operating their company vehicle.



Country-specific results

Although French drivers are less likely to speed or allow their driving to be affected by working time pressures, a worrying 81 per cent admit to texting while behind the wheel. The situation is only worse in Italy, where 95 per cent do it, 53 per cent on a regular basis.

Great Britain comes out on top in this regard, with 85 per cent claiming they never text while driving for work purposes.



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Research summary

Driver behaviour is under the spotlight more than ever before. Rising fuel costs have put companies under increasing pressure to realise greater efficiencies from their vehicle fleets but poor driving performance remains the biggest barrier to this.

This research reveals 77 per cent of LCV drivers across Europe admit to breaking the speed limit, with 23 per cent doing so regularly. The resultant impact on fuel efficiency is significant, as driving at higher speeds will use considerably more fuel than driving at lower speeds.

Advances in fleet management technology mean companies have the ability to work with their drivers in a cooperative way in order to improve driver performance. Transparency in the measurement of performance standards - such as speeding, idling, fuel efficiency and even harsh steering or braking - and provision of direct and real-time feedback while driving can ensure safer, greener driving is achieved through collaborative effort.

There are also implications for road safety. When it is considered a third of all accidents involve at-work drivers, the onus is on businesses to enforce change for the safety of all road users. Therefore, it is a concern to see half of all

operational fleet drivers admit working time pressures make them more likely to speed and take risks, especially when this situation is preventable.

The potential benefits of tackling driver behaviour are significant, from a reduction in accident numbers and lower insurance premiums to reduced fuel costs.

By measuring performance and putting schemes in place to help drivers improve, businesses can take control of many of the variables which have an adverse impact on the efficient operation of a vehicle fleet.

Such an approach could prove crucial in helping forward-thinking organisations to gain a competitive edge.



Thomas Schmidt, Managing Director, TomTom Business Solutions.

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