



Commercial Vehicle Study 2021: The Connected Truck

Results of a survey among transport companies,
logistics providers and forwarding agents

infas

Key results:

Better ratings for software – environment now more important

- › **General conditions:** persistent strong cost pressure and competition for drivers – automation and infrastructure still judged critically – environmental protection more important than in 2016
- › **Automation:** continued skepticism and growing indecision – logistics providers show strong interest in fuel economy and driver assistance
- › **Drivers:** fierce competition and greater training needs – labor costs still the biggest issue – software for managing road performance gets better ratings than in 2016
- › **Vehicles:** driver assistance systems are on the wish lists of logistics providers – software for vehicle management is rated somewhat better than four years ago
- › **Software:** better ratings on the whole – but still unrealized potential?
- › **Challenges:** greater concerns than four years ago about the supply of drivers, infrastructure, environmental protection, digitalization and companies like Amazon

Continental Commercial Vehicle Study 2021: Contents

General Conditions

Vehicles and Logistics

Automation

Assessments Relating to Drivers

Challenges

Methodological Profile:

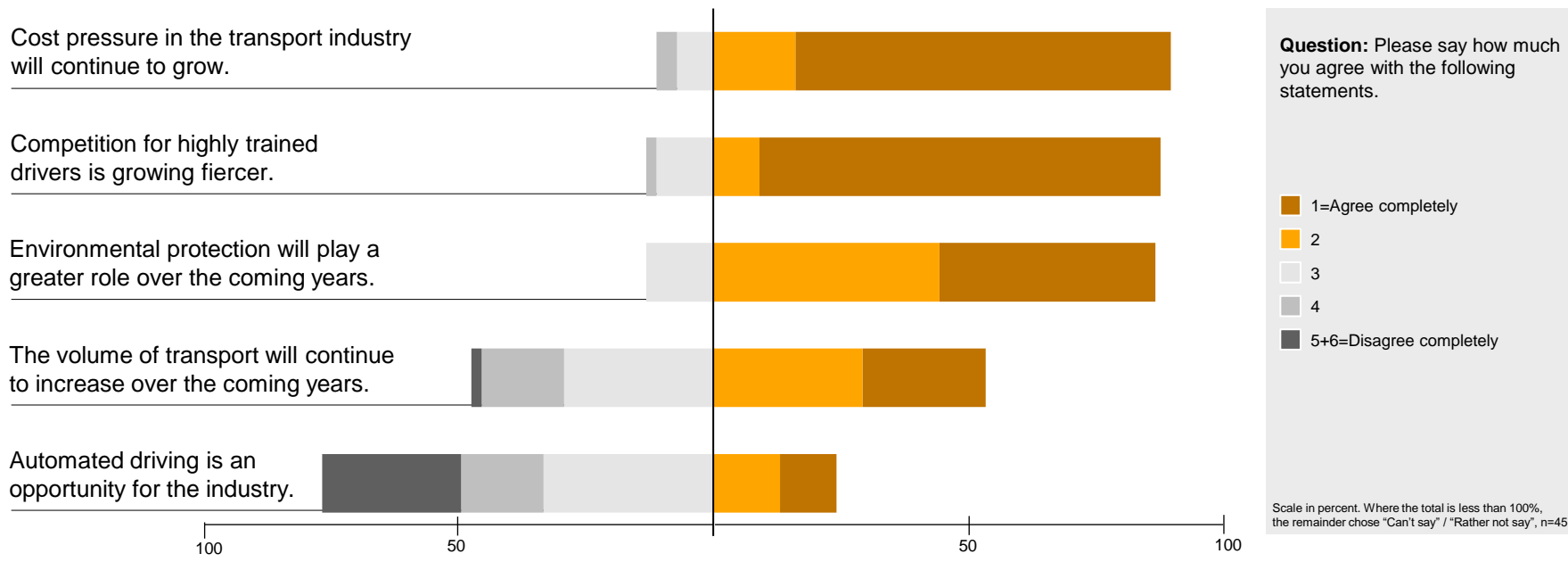
Notes on the company survey

- › Sample:
Forwarding agents, logistics providers and transport companies from Germany – first and second management levels at small, medium-sized and large companies.
- › Contacting and interviewing:
The person who organizes transports in the company was contacted by telephone. This person was then invited to take part in the online survey.
- › Topics:
Questions on vehicles, drivers, automation, software and technology needs in transport and logistics. Also general conditions and challenges in the industry.
- › Survey period:
February to May 2020. The first peak of the Covid-19 pandemic in Germany came in March, after which the telephone survey was discontinued. A total of 3,000 companies were approached. In late April, reminders were sent in order to encourage participation.
- › Note on interpretation:
This presentation includes the results obtained from 45 participating companies. **On account of the small number of cases, these results should only be seen as trend indicators.** The results are compared in the following with those from the previous study in 2016, which included a three-digit number of cases.

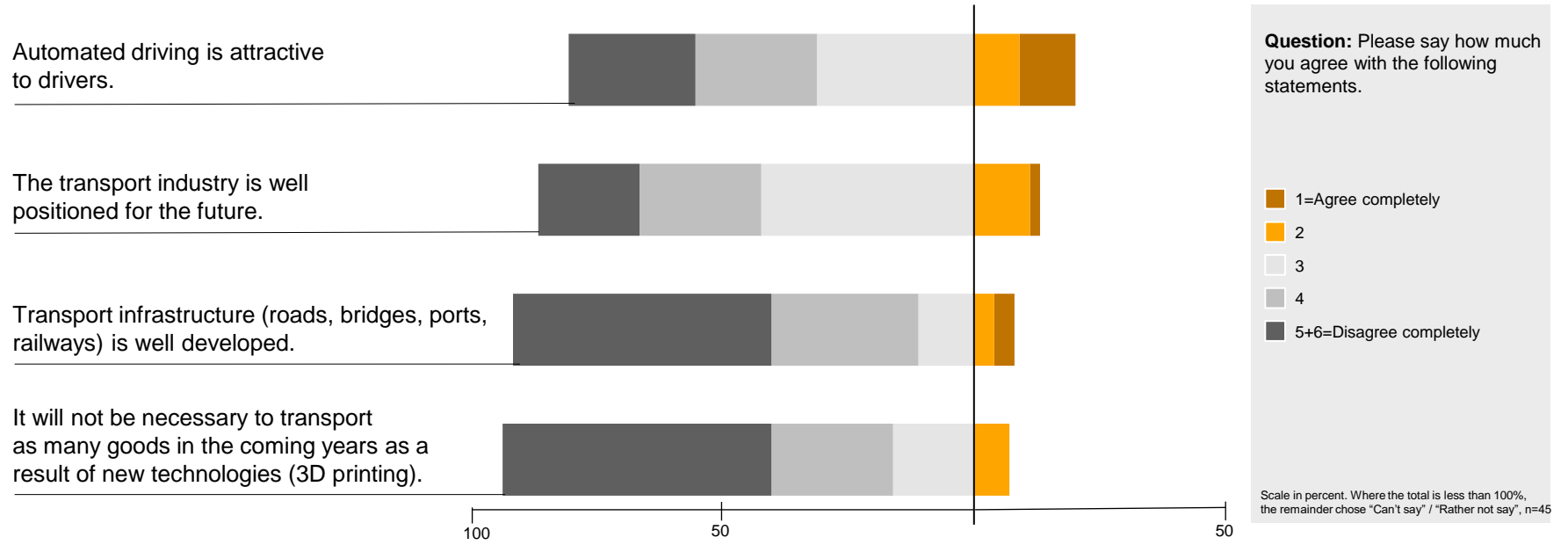
General Conditions

Future of the Transport Industry:

Cost pressure and strong competition for drivers

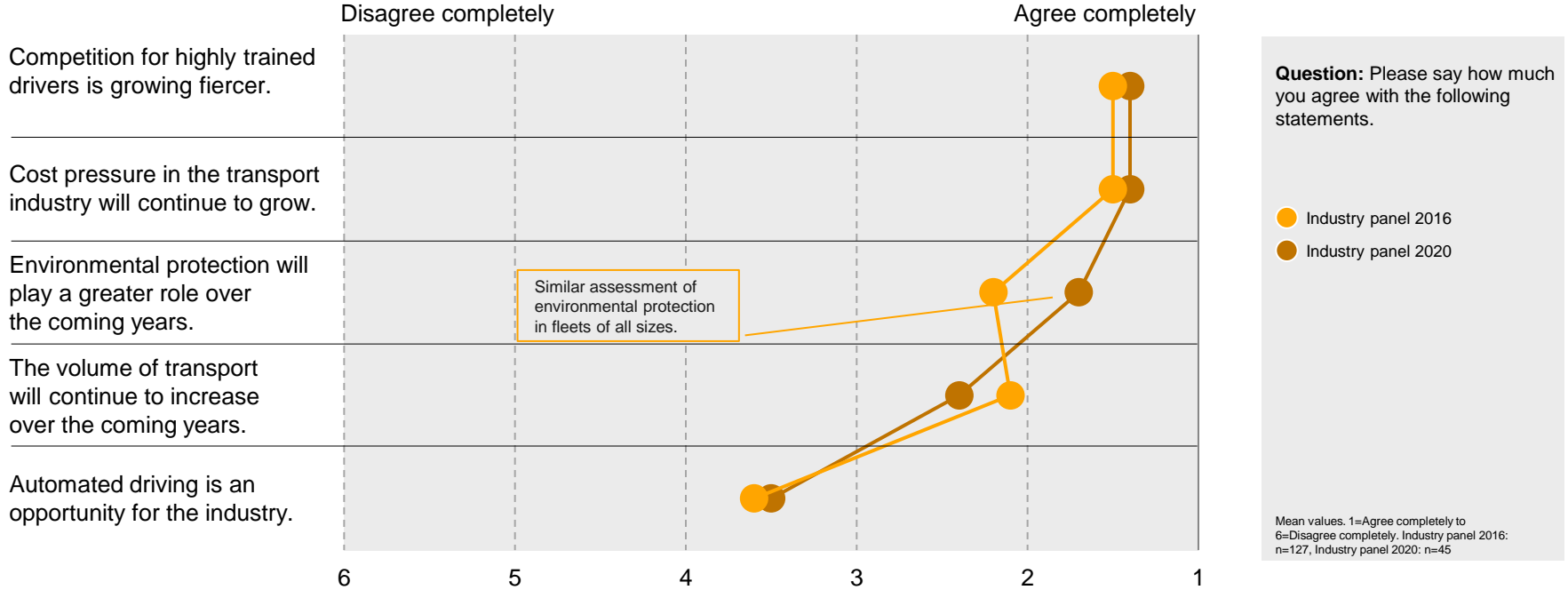


Future of the Transport Industry: Automation and infrastructure judged critically



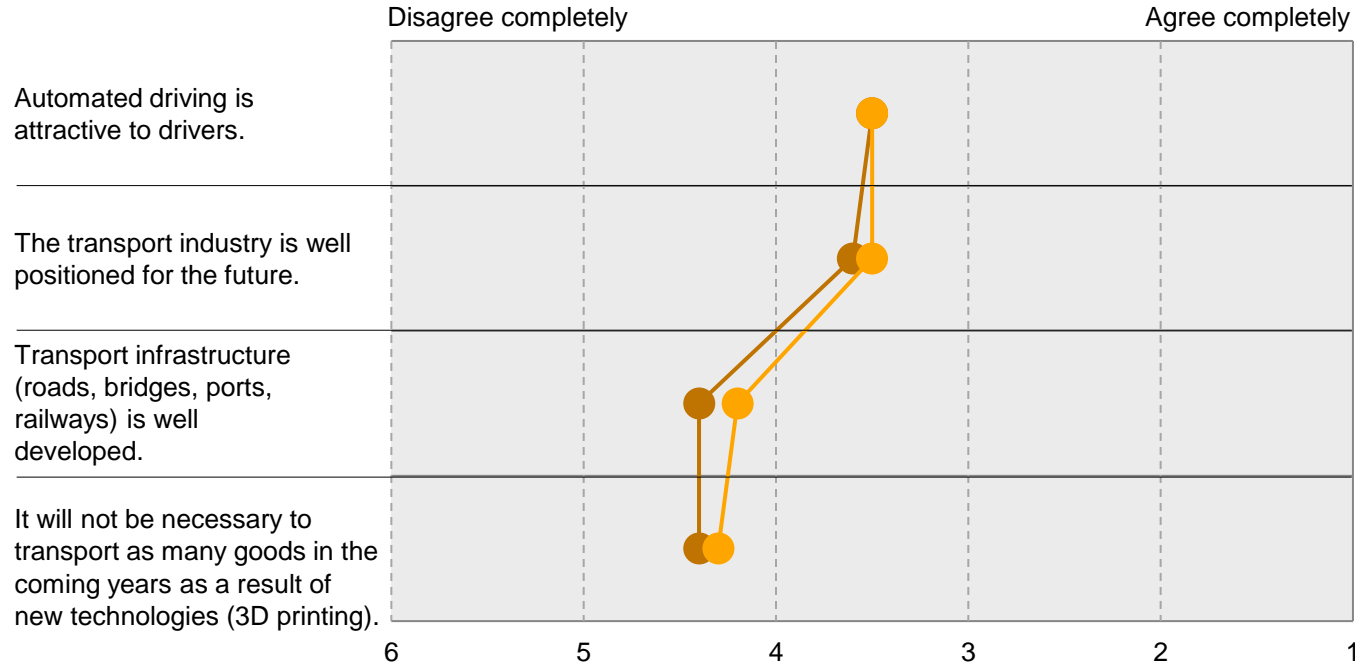
Future of the Transport Industry:

Environmental protection more important than in 2016.



Future of the Transport Industry:

Assessments of automation and infrastructure unchanged



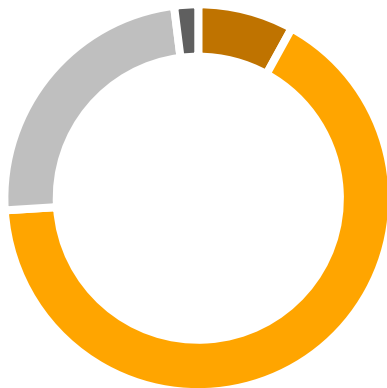
Question: Please say how much you agree with the following statements.

- Industry panel 2016
- Industry panel 2020

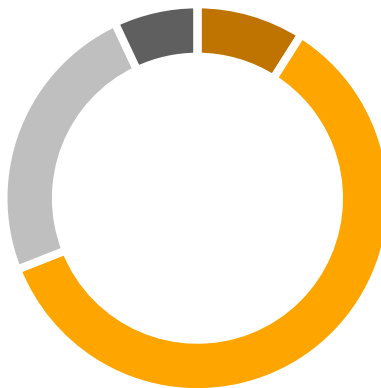
Mean values. 1=Agree completely to 6=Disagree completely. Industry panel 2016: n=127, Industry panel 2020: n=45

The Transport Business in the Next Ten Years: Small but increased percentage of negative assessments

› Industry panel 2016



› Industry panel 2020



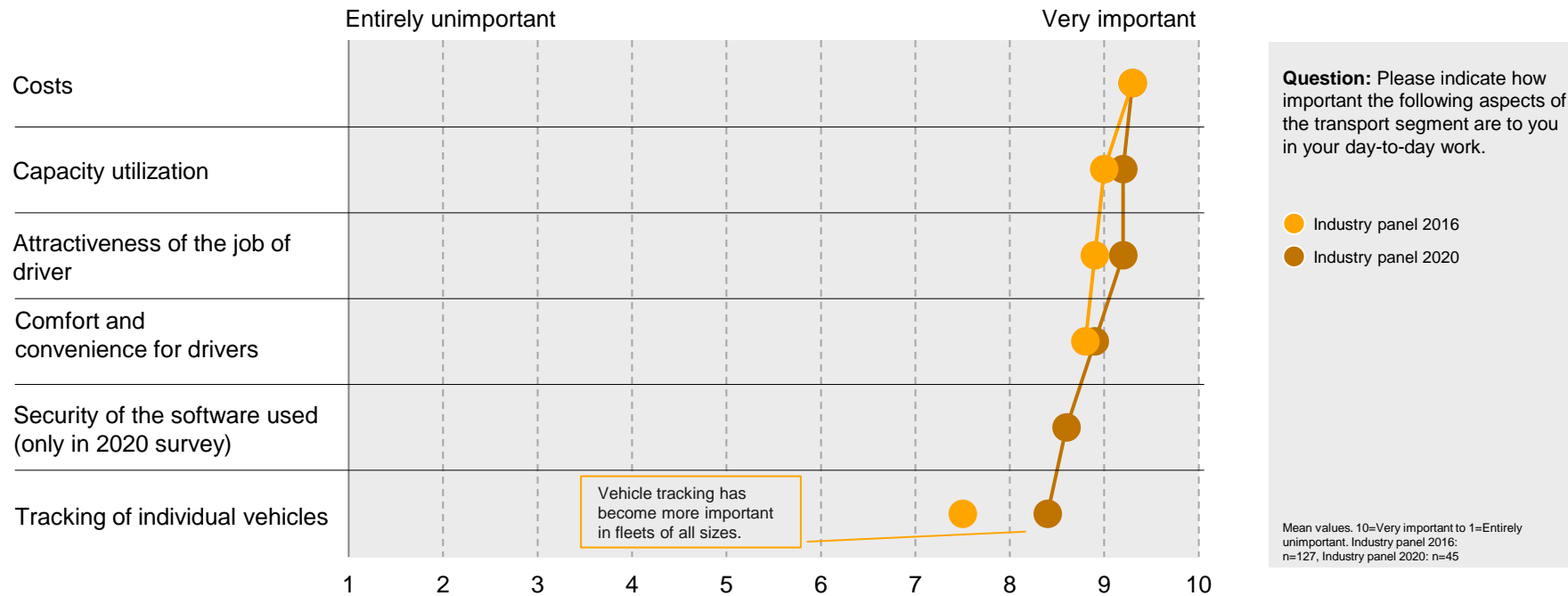
Question: Finally, we would like to ask: in your estimation, how will the transport business develop for your company over the next ten years?

- Very positively
- Somewhat positively
- Somewhat negatively
- Very negatively
- Can't say / Rather not say

Scale in percent. Industry panel 2016: n=127, Industry panel 2020: n=45

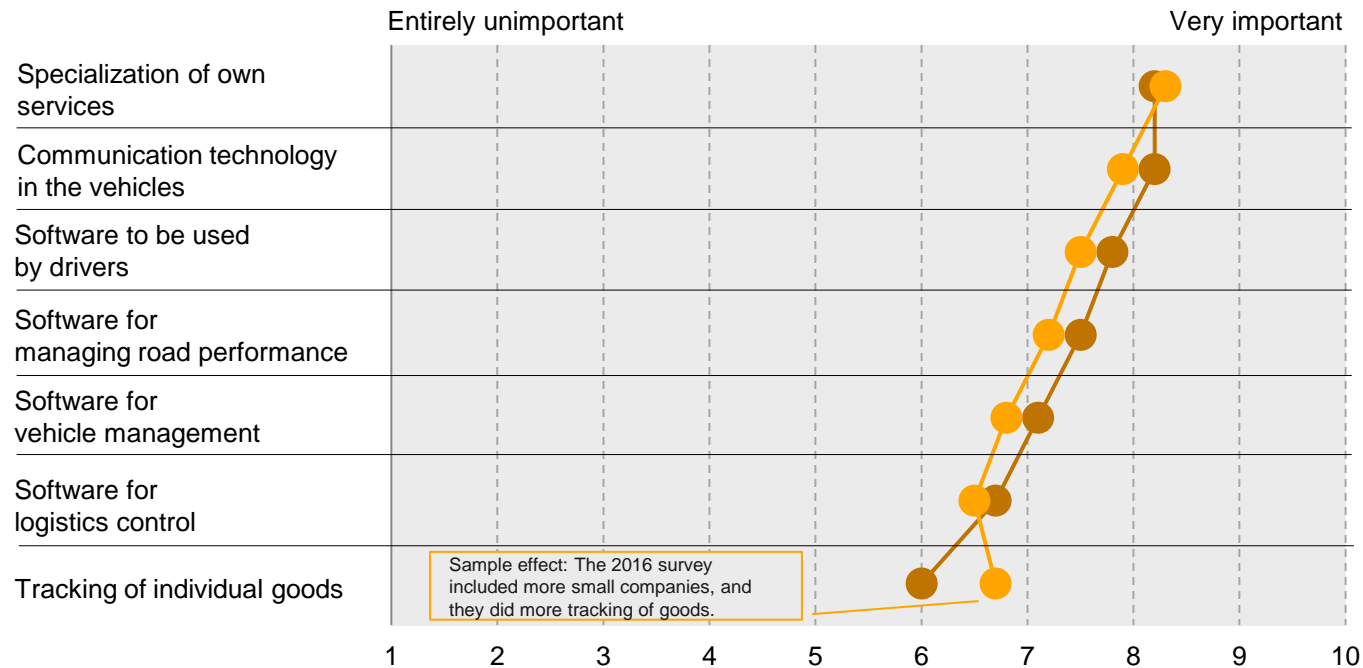
Importance of General Conditions:

Tracking of vehicles has become more important



Importance of General Conditions:

Few changes since the last survey

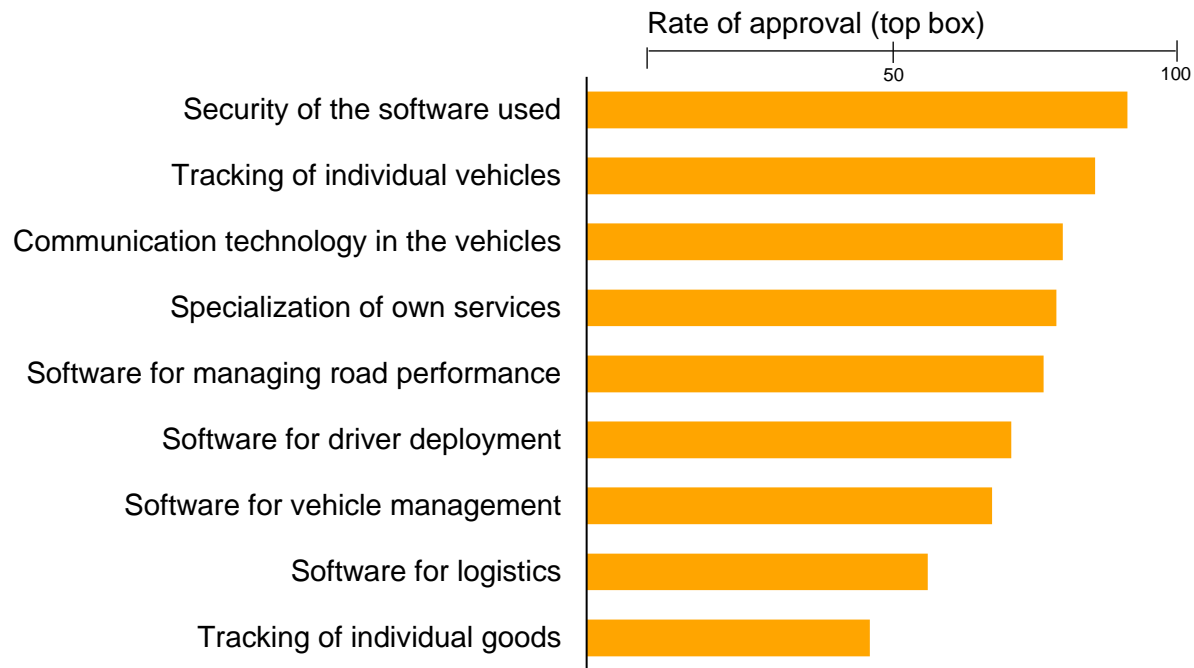


Question: Please indicate how important the following aspects of the transport segment are to you in your day-to-day work.

- Industry panel 2016
- Industry panel 2020

Mean values. 10=Very important to 1=Entirely unimportant. Industry panel 2016: n=127, Industry panel 2020: n=45

Importance of technology & software in day-to-day work: Focus on software security and vehicle tracking



Question: How important are the following aspects of the transport sector to you in your day-to-day work?

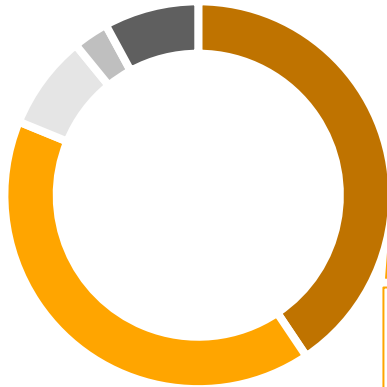
Scale in percent. Top box importance (values 8, 9 and 10 of 10), n=45

Vehicles and Logistics

Investment in Fuel-Saving Driving:

For logistics providers, it still needs to pay off rather quickly

› Industry panel 2016



Sample effect: The 2016 survey included more small companies, and they needed their investments to pay off more quickly.

› Industry panel 2020

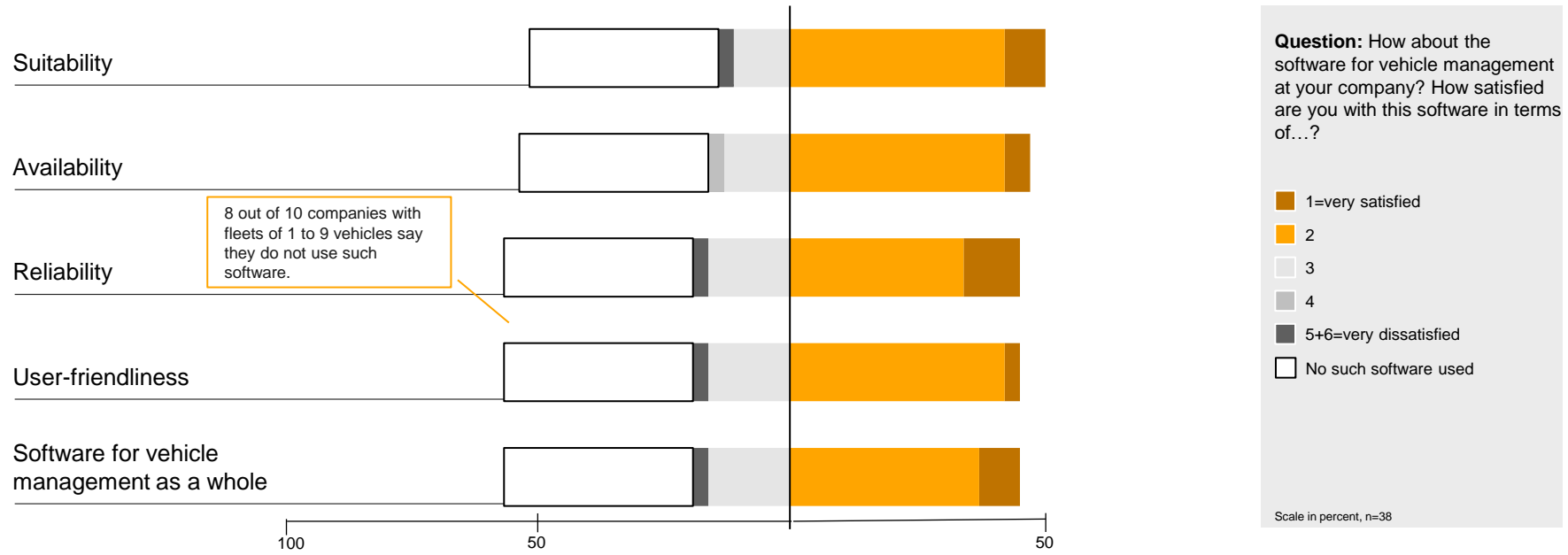


Question: Optimization of journeys and cost-saving are additional topics relating to commercial vehicles. When do investments in fuel-saving driving need to start paying off for you?

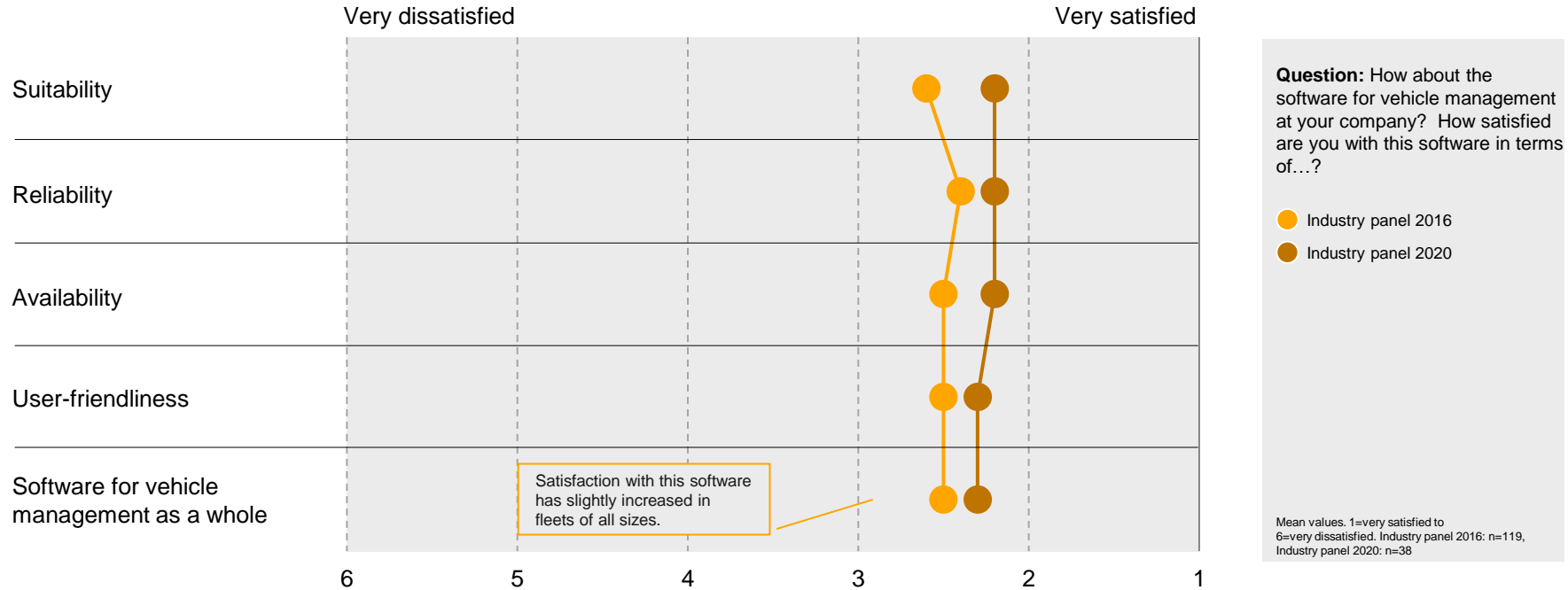
- After one year
- After two years
- After three to four years
- After five or more years
- None of the above
- Can't say / Rather not say

Scale in percent. Industry panel 2016: n=119, Industry panel 2020: n=38

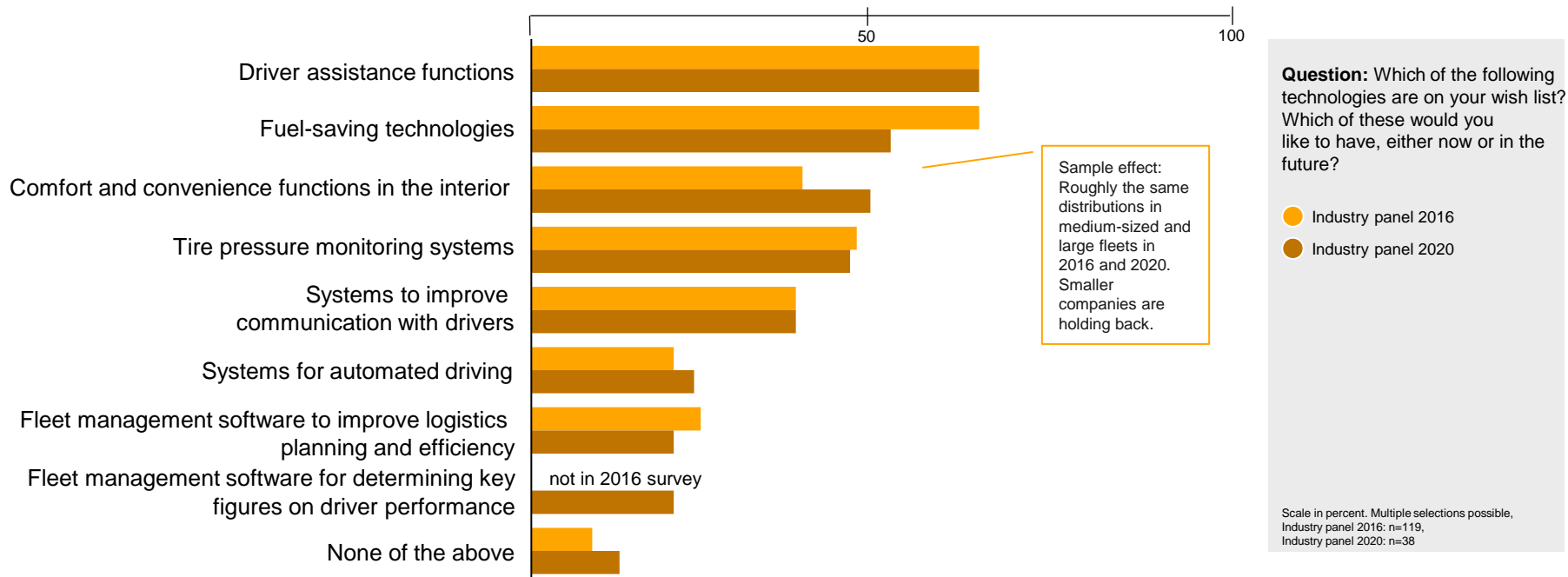
Satisfaction with *Vehicle Management Software*: Not used by ca. one third of companies, but otherwise rated positively



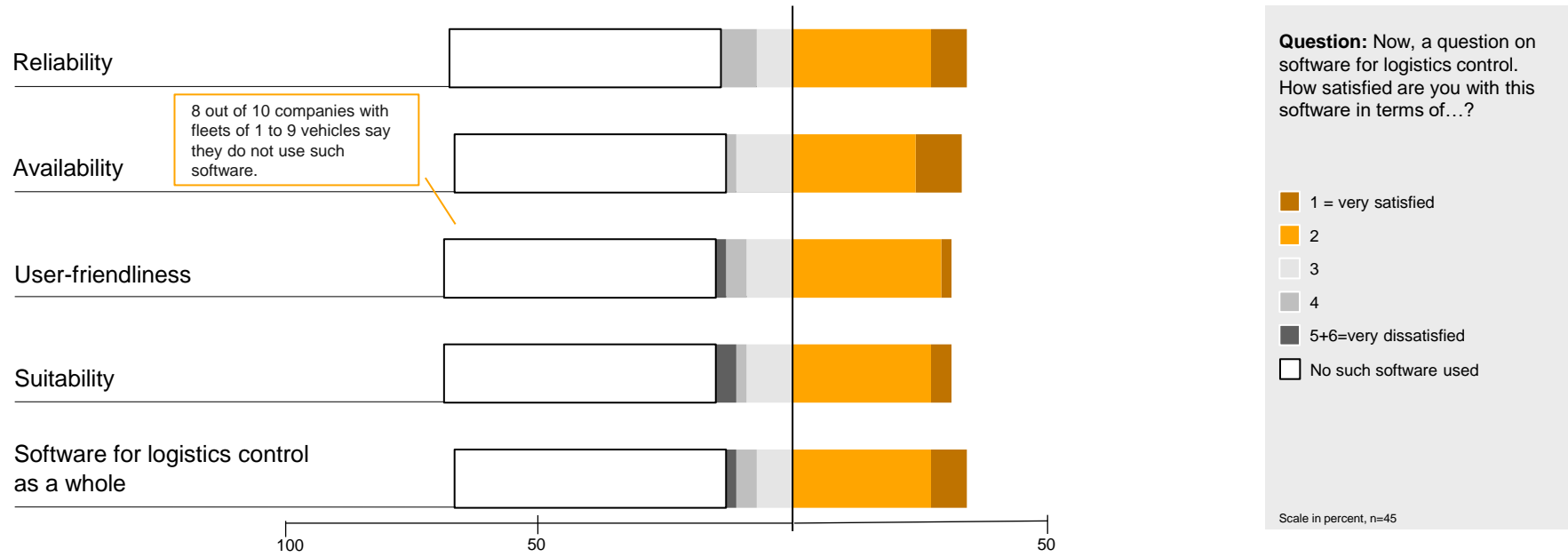
Satisfaction with *Vehicle Management Software*: Rated somewhat better than four years ago



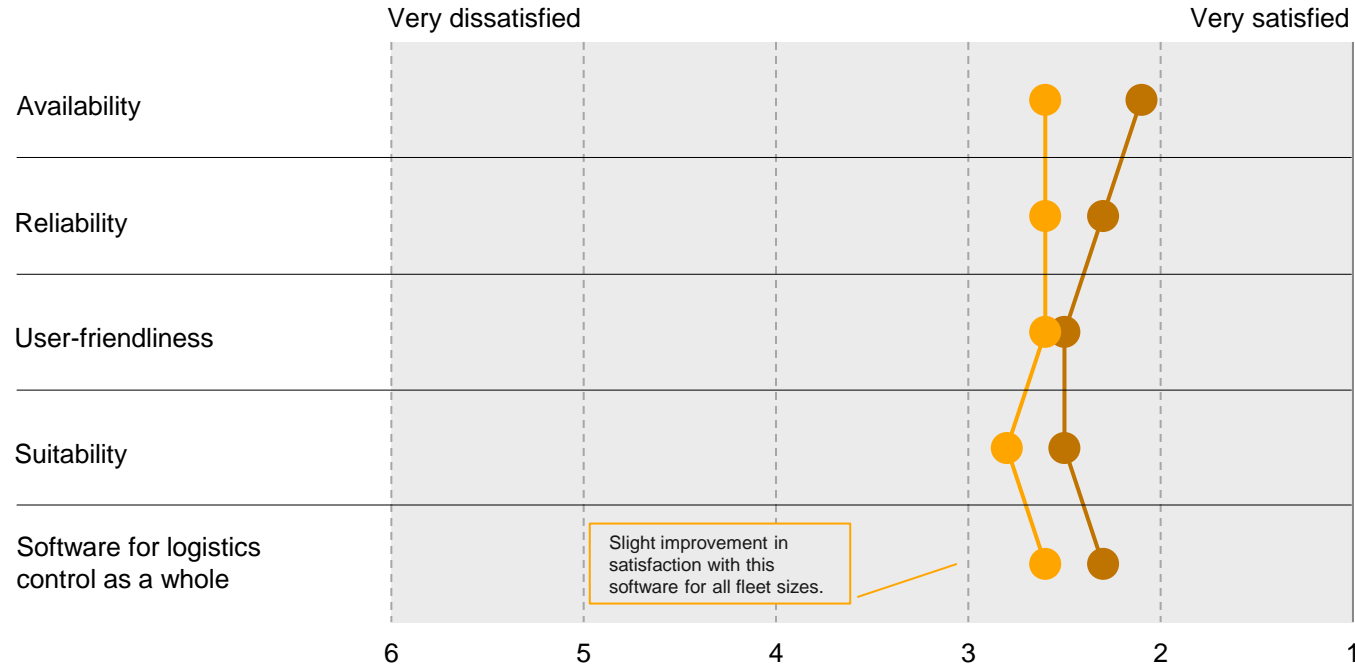
Technologies on Wish Lists of Logistics Providers: In Germany, two thirds want more driver assistance



Satisfaction with *logistics control software*: Used by roughly half of companies, good to medium assessments



Satisfaction with *logistics control software*: Better ratings for availability than in 2016



Question: Now, a question on software for logistics control. How satisfied are you with this software in terms of...?

- Industry panel 2016
- Industry panel 2020

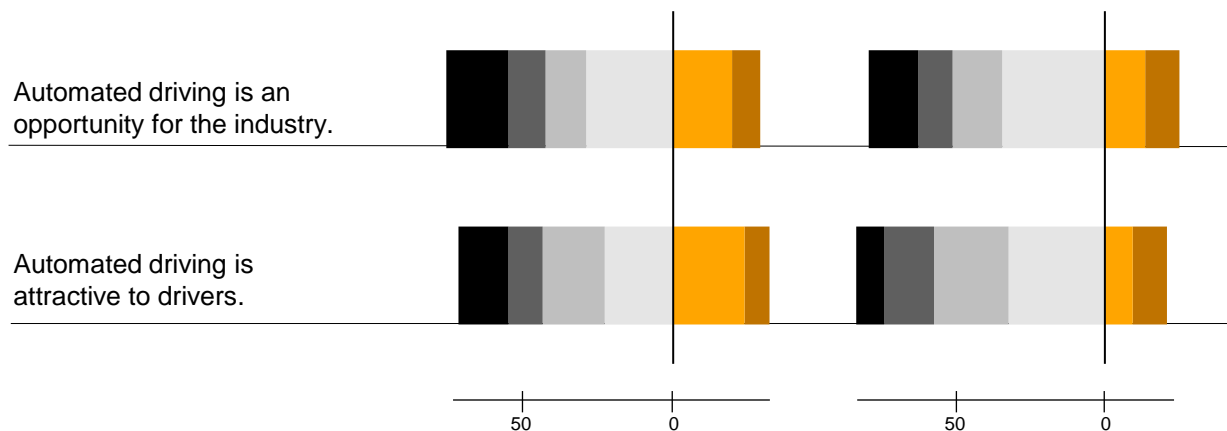
Mean values. 1=very satisfied to 6=very dissatisfied. Industry panel 2016: n=127, Industry panel 2020: n=45

Automation

Approval for Automated Driving Providers: Continued skepticism

› Industry panel 2016

› Industry panel 2020

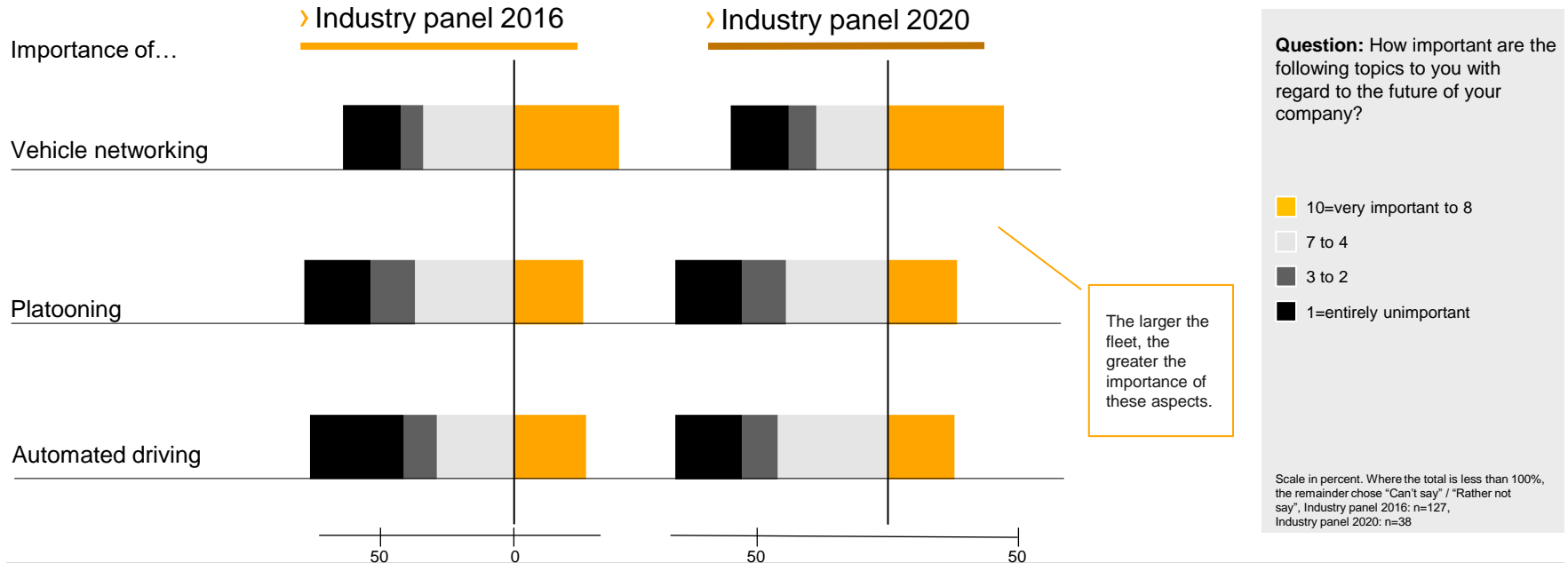


Question: Please say how much you agree with the following statements.

- 1=Agree completely
- 2
- 3
- 4
- 5
- 6=Disagree completely

Scale in percent. Where the total is less than 100%, the remainder chose "Can't say" / "Rather not say", Industry panel 2016: n=127, Industry panel 2020: n=45

Importance of Future Topics for Logistics Providers: Vehicle networking rated as most important



Importance of Assistance Systems:

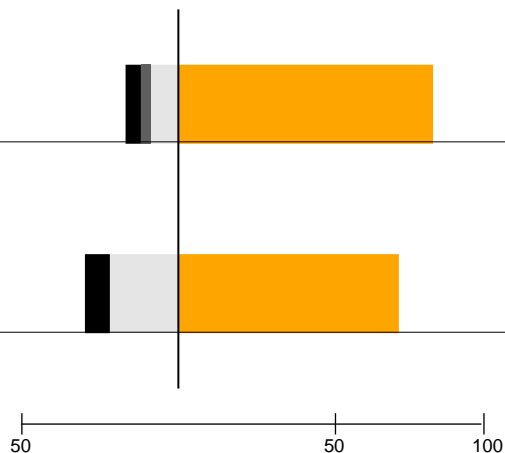
High ratings for fuel economy and driver assistance

Importance of...

> Industry panel 2020

Driver assistance systems
for better fuel economy

Driver assistance systems
as support for drivers



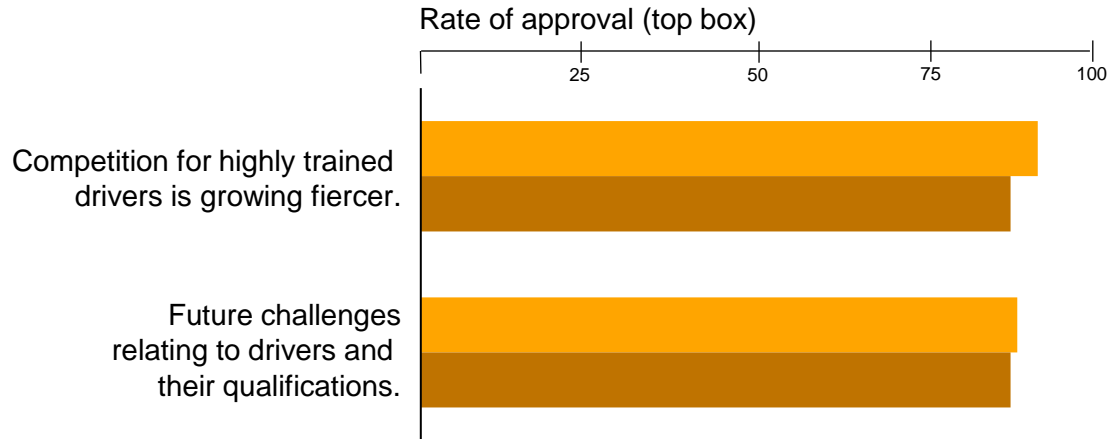
Question: How important are the following topics to you with regard to the future of your company?

- 10=very important to 8
- 7 to 4
- 3 to 2
- 1=entirely unimportant

Scale in percent. Where the total is less than 100%, the remainder chose "Can't say" / "Rather not say", Industry panel 2020: n=38

Assessments Relating to Drivers

Challenges Concerning Drivers: Tougher competition and more qualifications expected, almost as in 2016



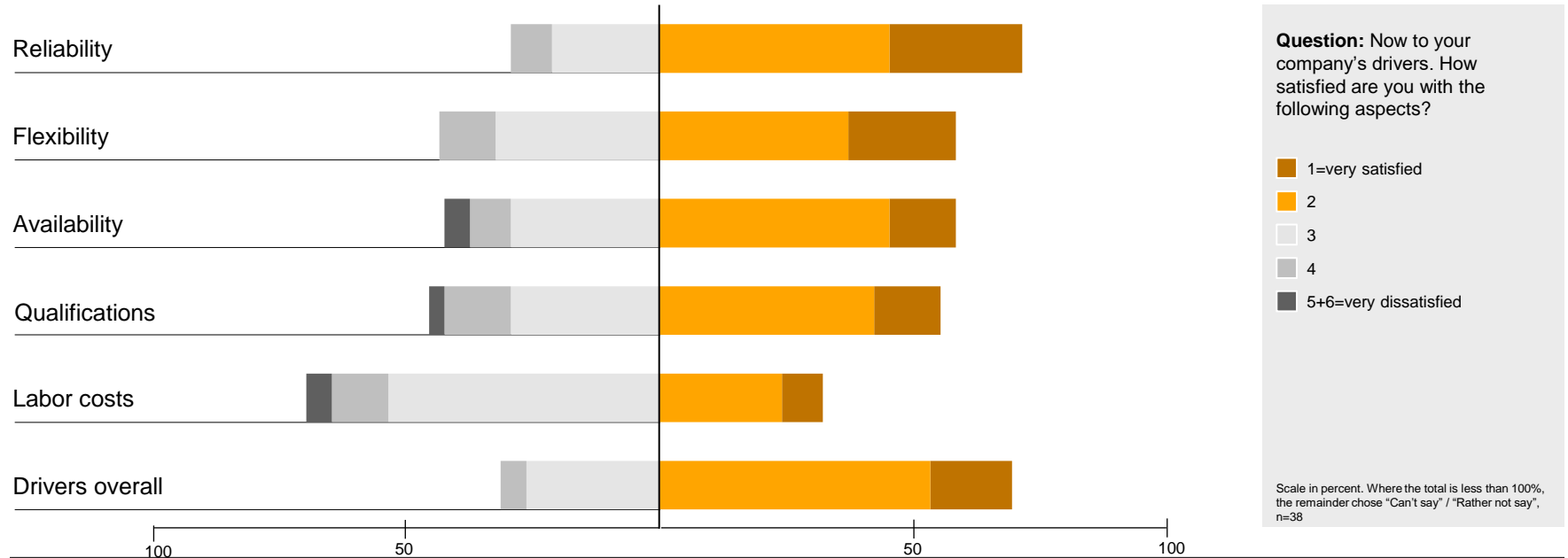
Question: Now, a question on your assessment of challenges in the transport business and your expectations for the future of the industry. In your opinion, what is the scale of the future challenges?/Please say how much you agree with the following statements.

■ Industry panel 2016
■ Industry panel 2020

Scale in percent. Combined rates of approval: 10=Enormous to 1=Minimal; 1=Agree completely to 6=Disagree completely (top box, from 10 to 8 and 1 to 2), Industry panel 2016: n=127, Industry panel 2020: n=45

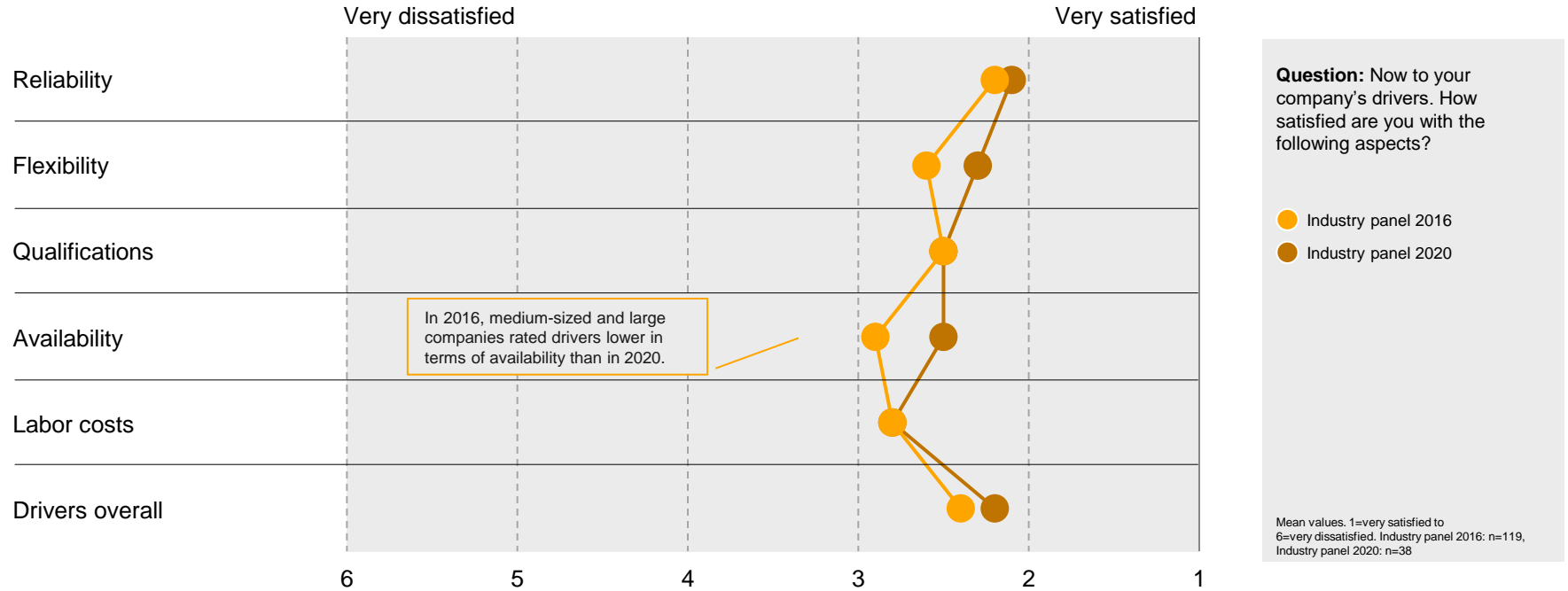
Satisfaction with Drivers:

Labor costs are the biggest problem

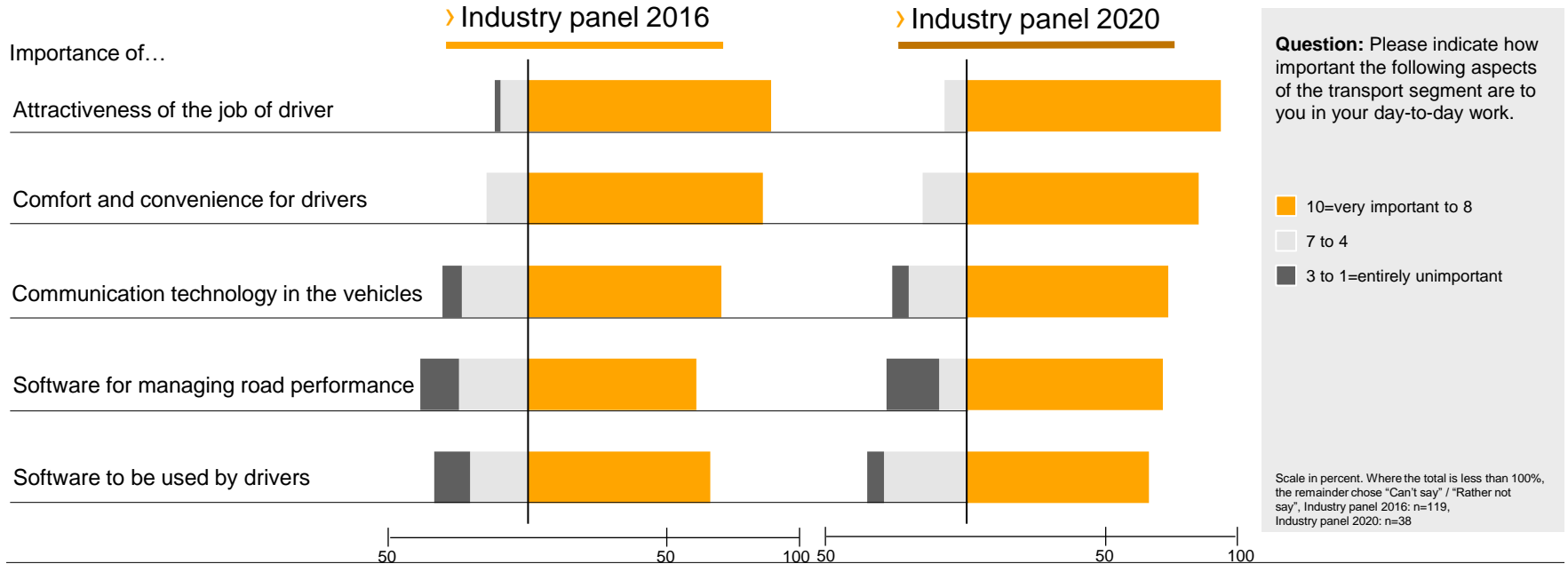


Satisfaction with Drivers:

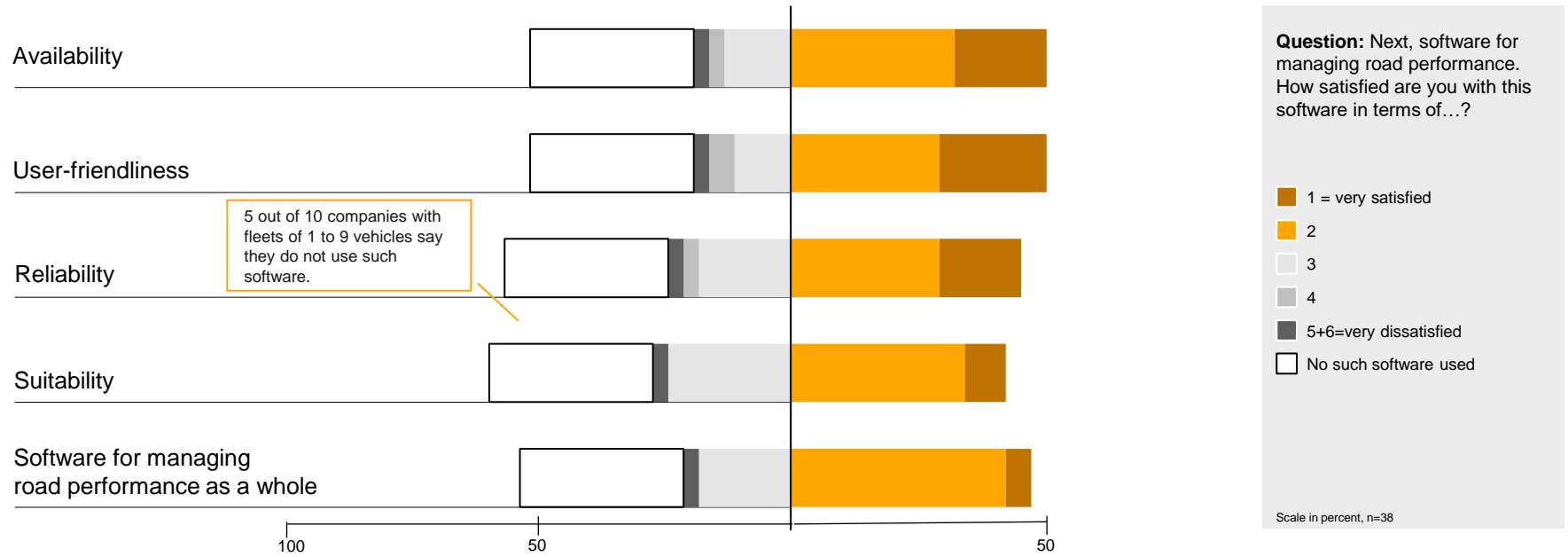
Costs continue to be a problem



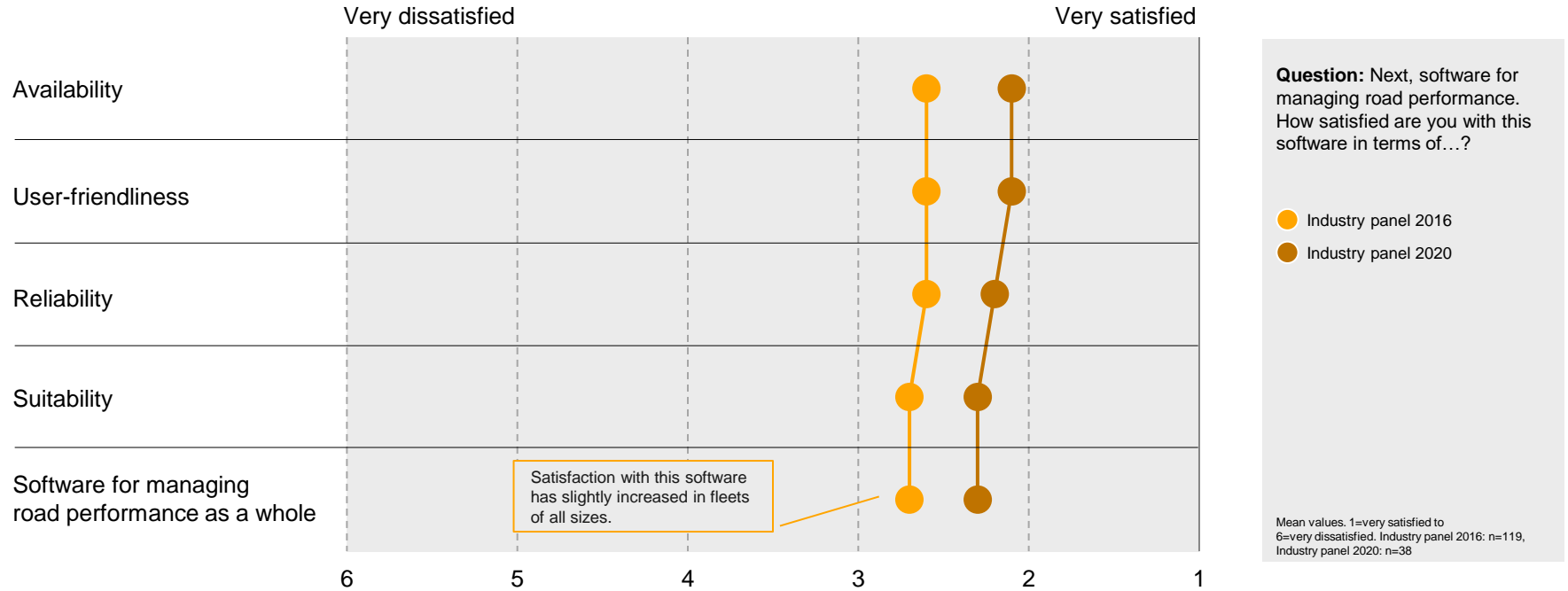
Driver Topics as Perceived by Logistics Providers: Distributions in 2020 similar to those four years ago



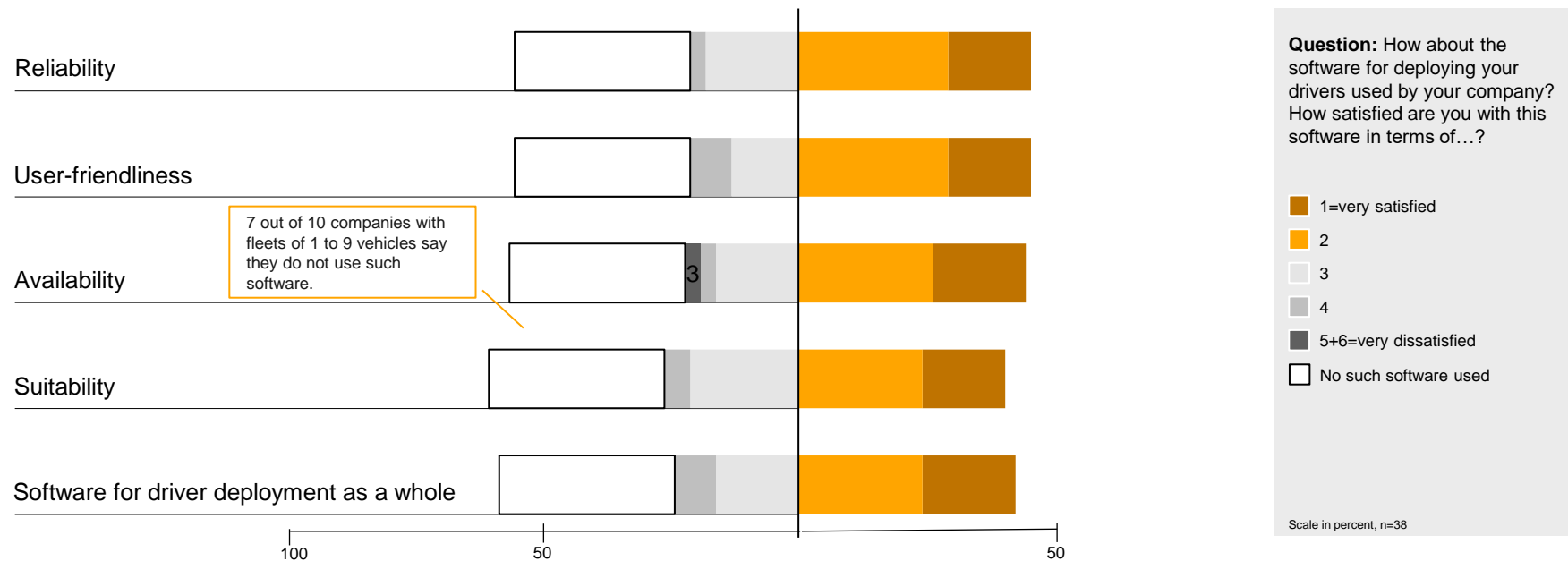
Satisfaction with *Software for Managing Road Performance*: Not used by a third of companies, but otherwise rated positively



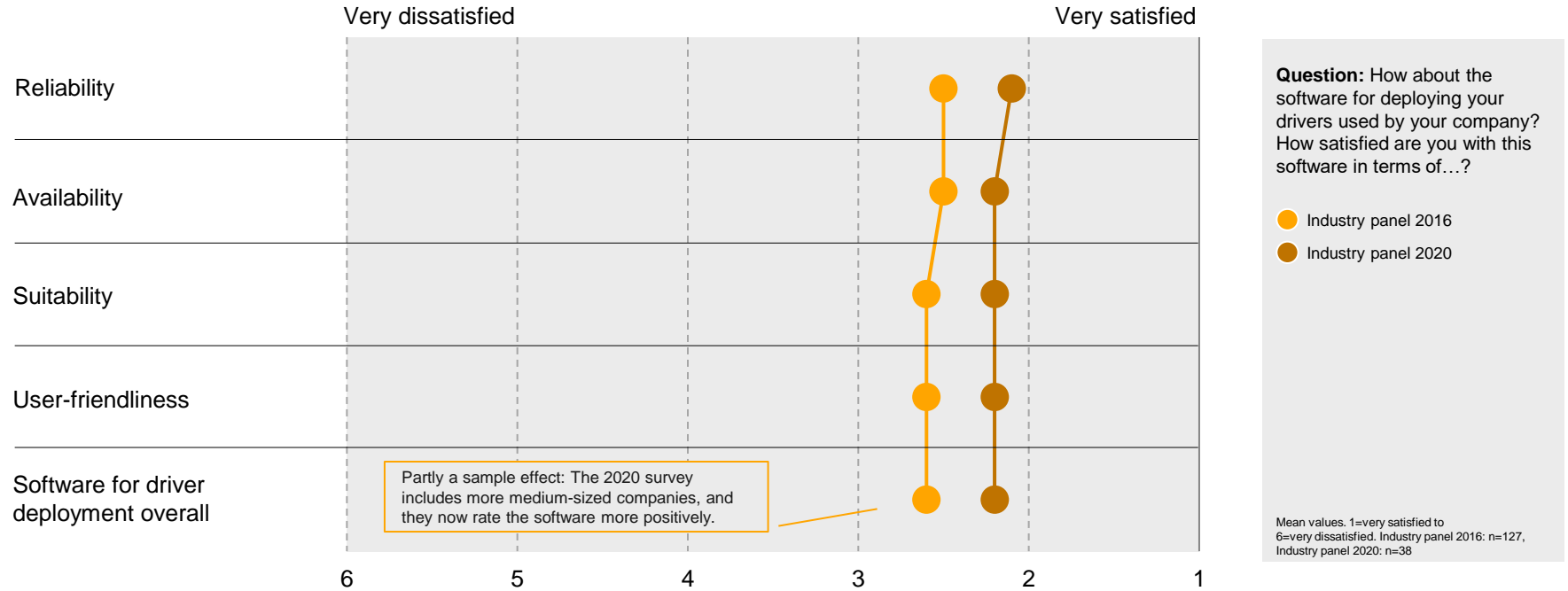
Satisfaction with *Software for Managing Road Performance*: Rated about half a point better than in 2016



Satisfaction with *Software for Driver Deployment*: Not used by one third, but the others are fairly satisfied



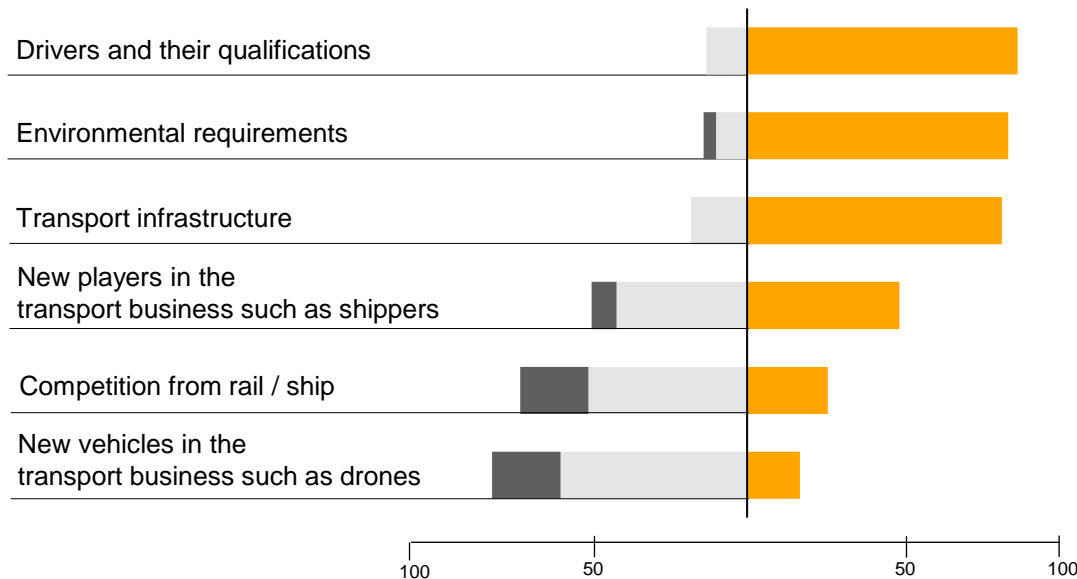
Satisfaction with *Driver Deployment Software*: Better ratings than four years ago



Challenges

Future Challenges:

Drivers, infrastructure, environment and new players

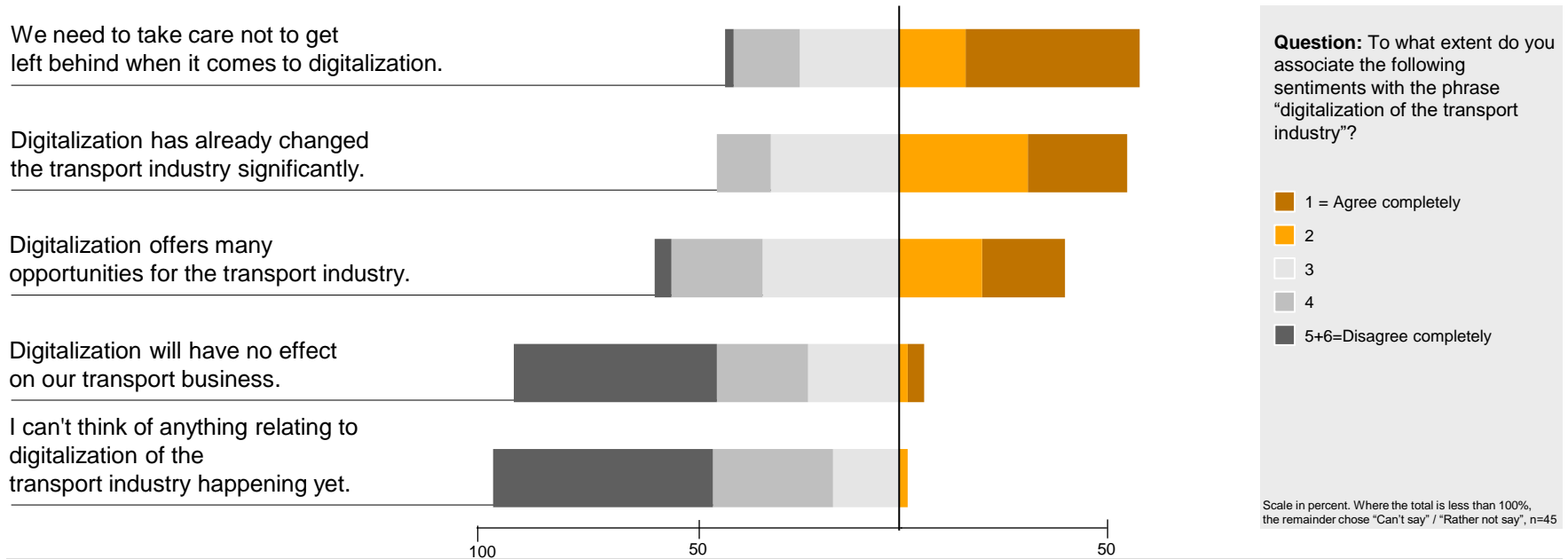


Question: Now, a question on your assessment of challenges in the transport business and your expectations for the future of the industry. In your opinion, what is the scale of the future challenges in the following areas?

- 10 = Enormous to 8
- 7 to 4
- 3 to 1=Minimal

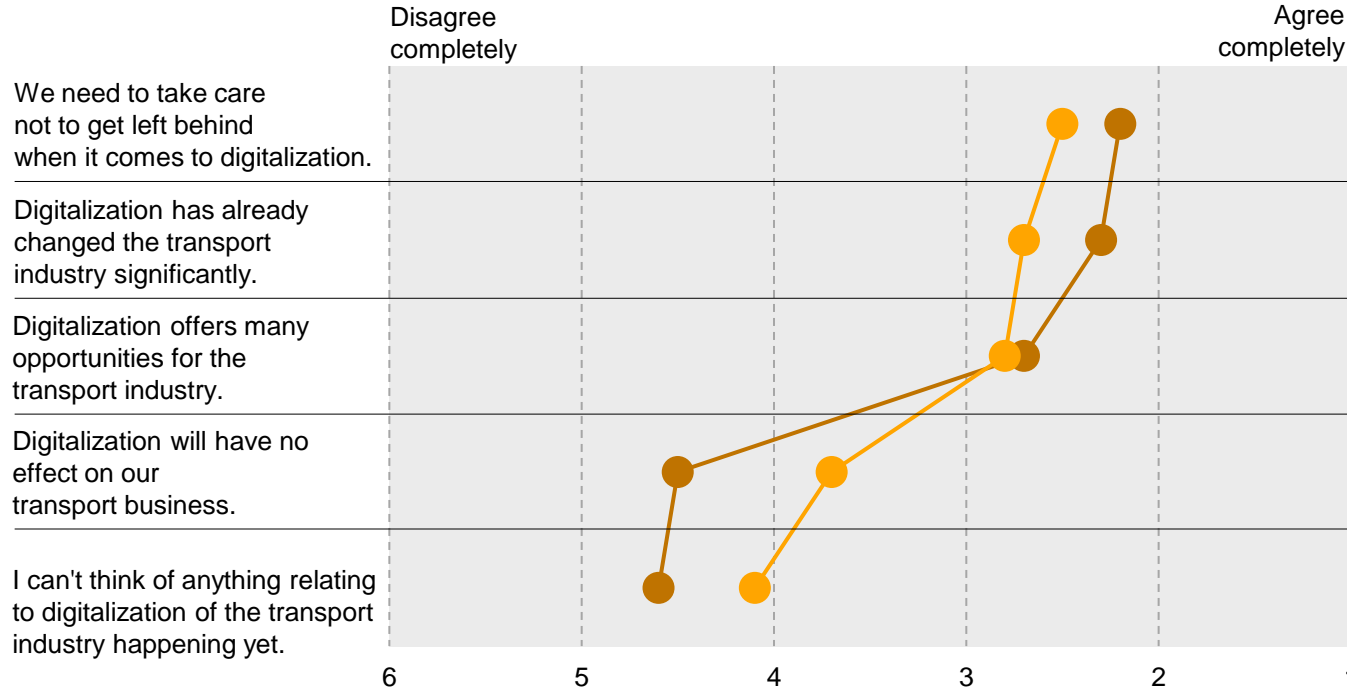
Scale in percent. Where the total is less than 100%, the remainder chose "Can't say" / "Rather not say", Industry panel 2020: n=38

Statements on Digitalization: Changes can be felt in everyday work; are we sufficiently prepared?



Statements on Digitalization:

More effects and greater concern than in 2016



Question: To what extent do you associate the following sentiments with the phrase "digitalization of the transport industry"?

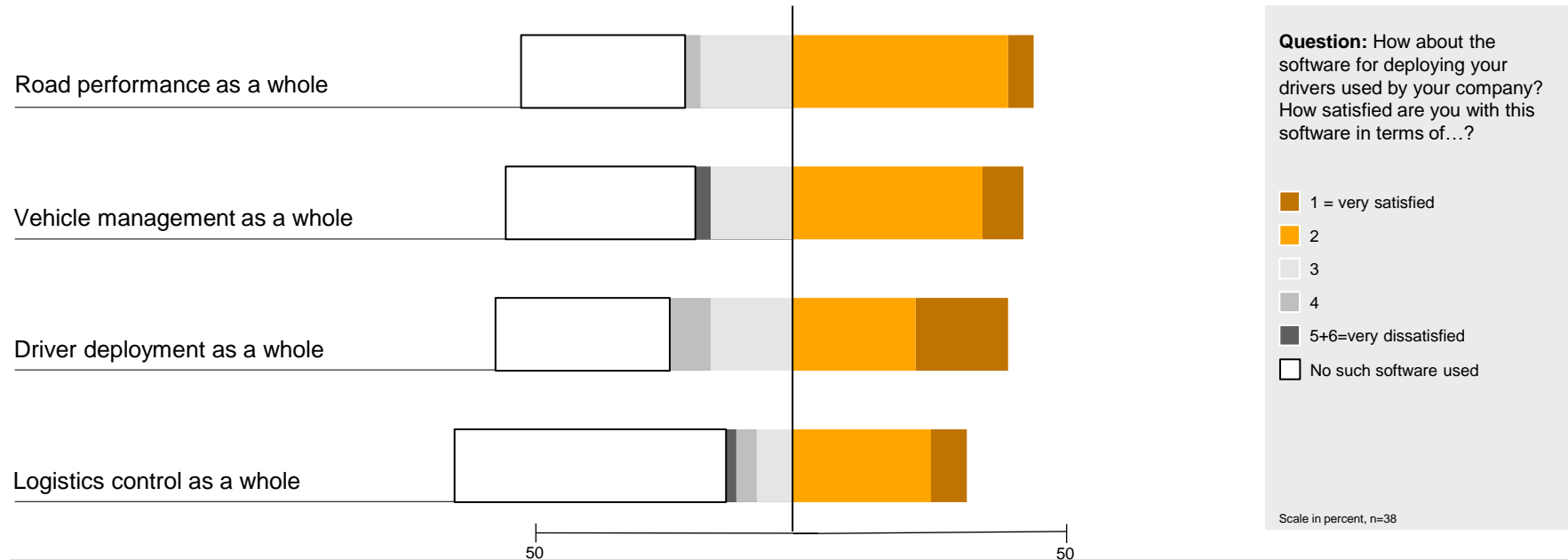
● Industry panel 2016

● Industry panel 2020

Mean values. 1=Agree completely to 6=Disagree completely. Industry panel 2016: n=127, Industry panel 2020: n=45

Satisfaction with Software as a Whole:

Mainly favorable ratings – but untapped potential?



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