

2013 Survey Results: Measuring Corporate Attitudes to Employee Distracted Driving



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1 Executive Summary

Due to high profile crashes, jury verdicts against employers, and a changing regulatory environment, the issue of employee distracted driving continues to be an important topic among safety and risk management professionals in 2013.

The 2013 survey results are based on responses submitted by 547 professionals in the safety, risk and fleet management disciplines from employers across a variety of different industries. The objective of the survey is to measure corporate fleet operators' perspectives and attitudes toward distracted driving and how attitudes are changing over time.

Key findings include:

- **A majority of employers have already adopted distracted driving policies.** 71% of respondents work for companies that have adopted some form of policy to manage employee use of mobile devices while driving.
- **Employers without a policy will adopt one soon.** Among 29% of companies without an existing policy, the survey finds that 52% plan to adopt a policy. Of those, 55% plan to adopt a policy within the next 12 months.
- **Efforts to enforce distracted driving policies remain steady.** 86% of total respondents report that their companies take some measure to enforce distracted driving policies. This number is steady when compared to 2012 survey results.
- **Current enforcement efforts are primarily manual and reactive.** The most common method of policy enforcement is having employees attest (81%). Other enforcement methods include: Training (75%), Supervisor or Peer observation (72%), Post Crash Discipline (54%), Random Safety Audits (40%).
- **Confidence is lacking in current policy enforcement.** While most companies are taking some steps to enforce compliance with documented policies, confidence in those efforts is limited. Only 32% report they are "very confident" that current methods are effective. 60% are "somewhat confident", while 8% are "not confident".
- **"Hands-Free" and "Zero Tolerance" are most popular policies.** 2013 was the first year in which the survey asked employers to identify mobile device behaviors specifically prohibited by company policy. 45% prohibit all use, except hands-free. 41% prohibit all use, no exceptions. 12% prohibit texting emailing and browsing. 2% prohibit texting only.
- **Interest in policy technology continues to grow.** 22% of respondents report that they plan to evaluate either device-based software, device analytics or in-vehicle cameras within the next twelve months to better enforce compliance with distracted driving policies.
- **Android™ and iPhone® smartphones are fast growing, while Blackberry and Push-to-Talk (PTT) feature phones are hanging in.** Android™ and iPhone® continue to grow rapidly and now represent 61% of corporate-liable smartphone devices. BlackBerrys have decreased, but remain prominent with 30% market share and

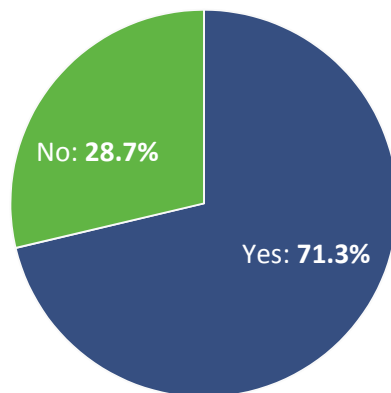
appear to have good prospects to maintain share based on customer interest in the new BlackBerry 10 devices.

- **Feature phones remain prominent, but have limited potential for growth.** Feature phones remain prominent among corporate liable devices with 53% of respondents issuing them to at least some portion of their employee drivers. Push-to-Talk (PTT) devices continue to be the most popular device type among company-liable feature phones, representing 38% of the total.
- **The tablet wave is coming to commercial fleet vehicles.** A full 27% of respondents currently equip employee drivers with some form of tablet computer. Of those, 73% are iPads and 27% are Android. Prospects for continued growth appear strong as 8% of total respondents indicate plans to deploy tablets to employee drivers within the next 12 months.

2 Third Annual Survey Results - 2013

2.1 Employers with Distracted Driving Policies

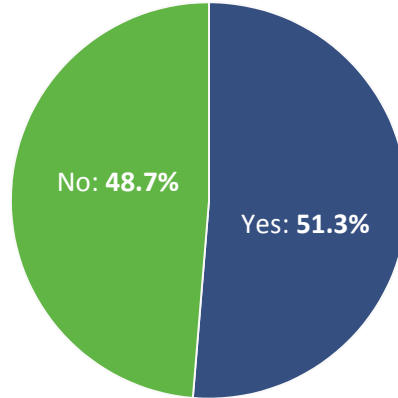
Percentage of respondents whose companies have adopted a policy:



■ Distracted driving policy in place ■ No distracted driving policy

2.2 Employers with Plans to Adopt Distracted Driving Policies

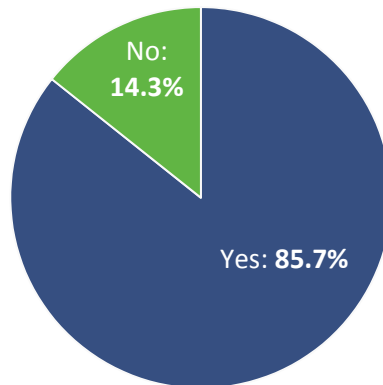
Percentage of respondents whose companies plan to adopt a policy:



■ Plan to adopt a distracted driving policy ■ No plan

2.3 Policy Enforcement Efforts

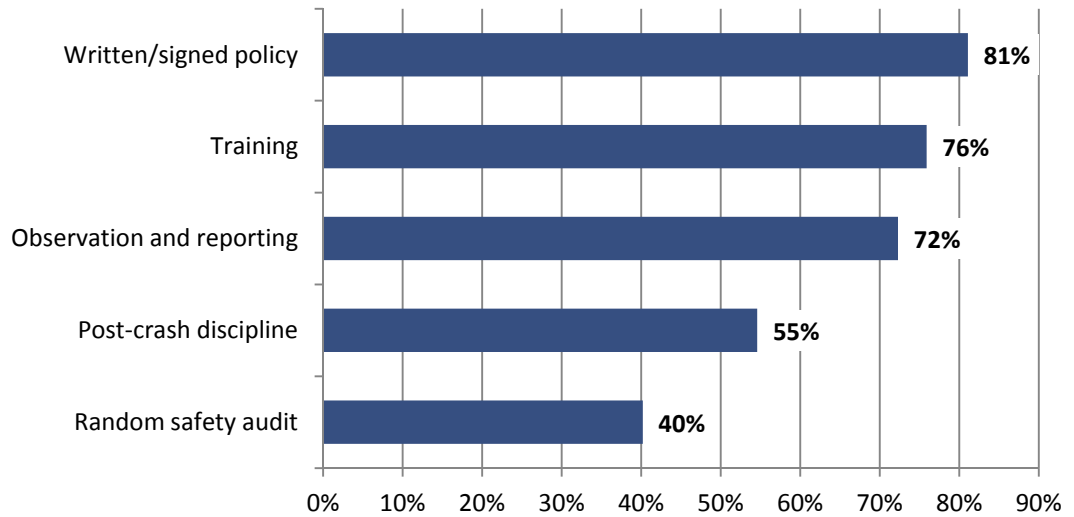
Percentage of companies attempting to enforce distracted driving policy:



■ Company enforces policy ■ Company does not enforce policy

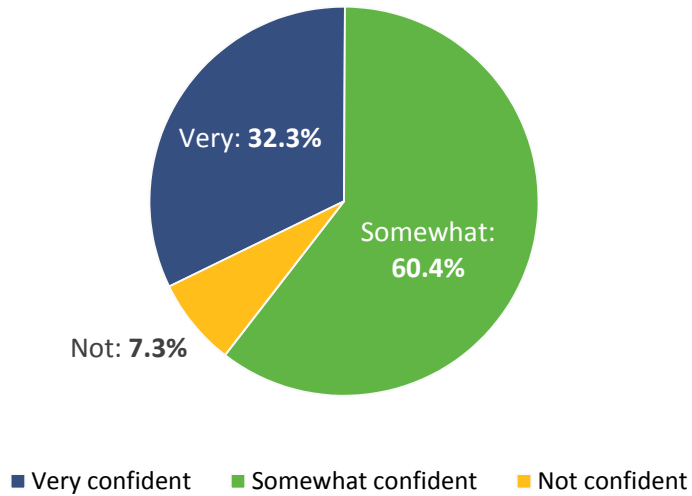
2.4 Policy Enforcement Methods

Methods of policy enforcement currently utilized:



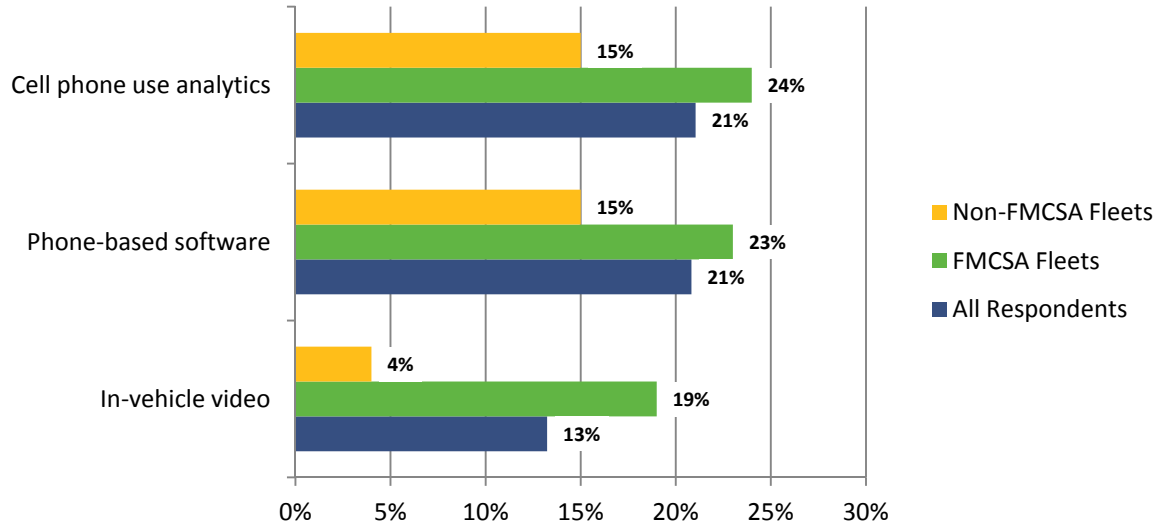
2.5 Confidence in Current Enforcement Methods

Percentage of respondents who are “very confident” that current policy enforcement methods are effective:

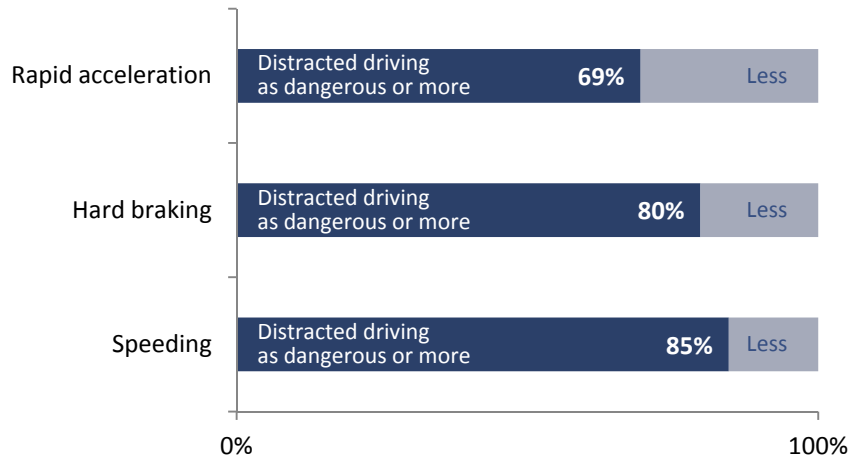


2.6 Evaluating Technology to Improve Policy Enforcement

Percentage of respondents that plan to evaluate technologies within 12 months to ensure compliance with cell phone use policy:

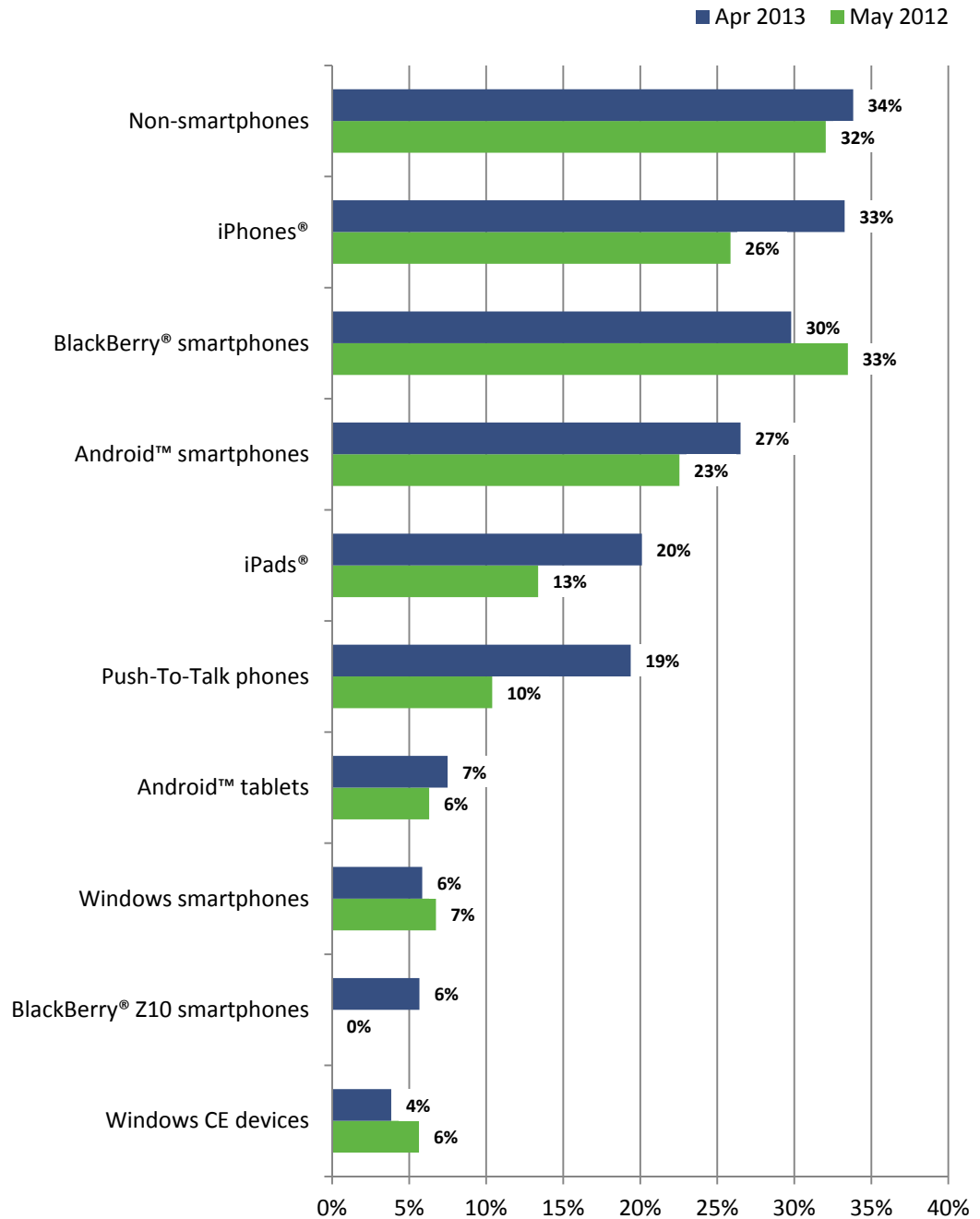


2.7 Risk of Distracted Driving Relative to Other Behaviors



2.8 Distribution of Company-Liable Mobile Devices

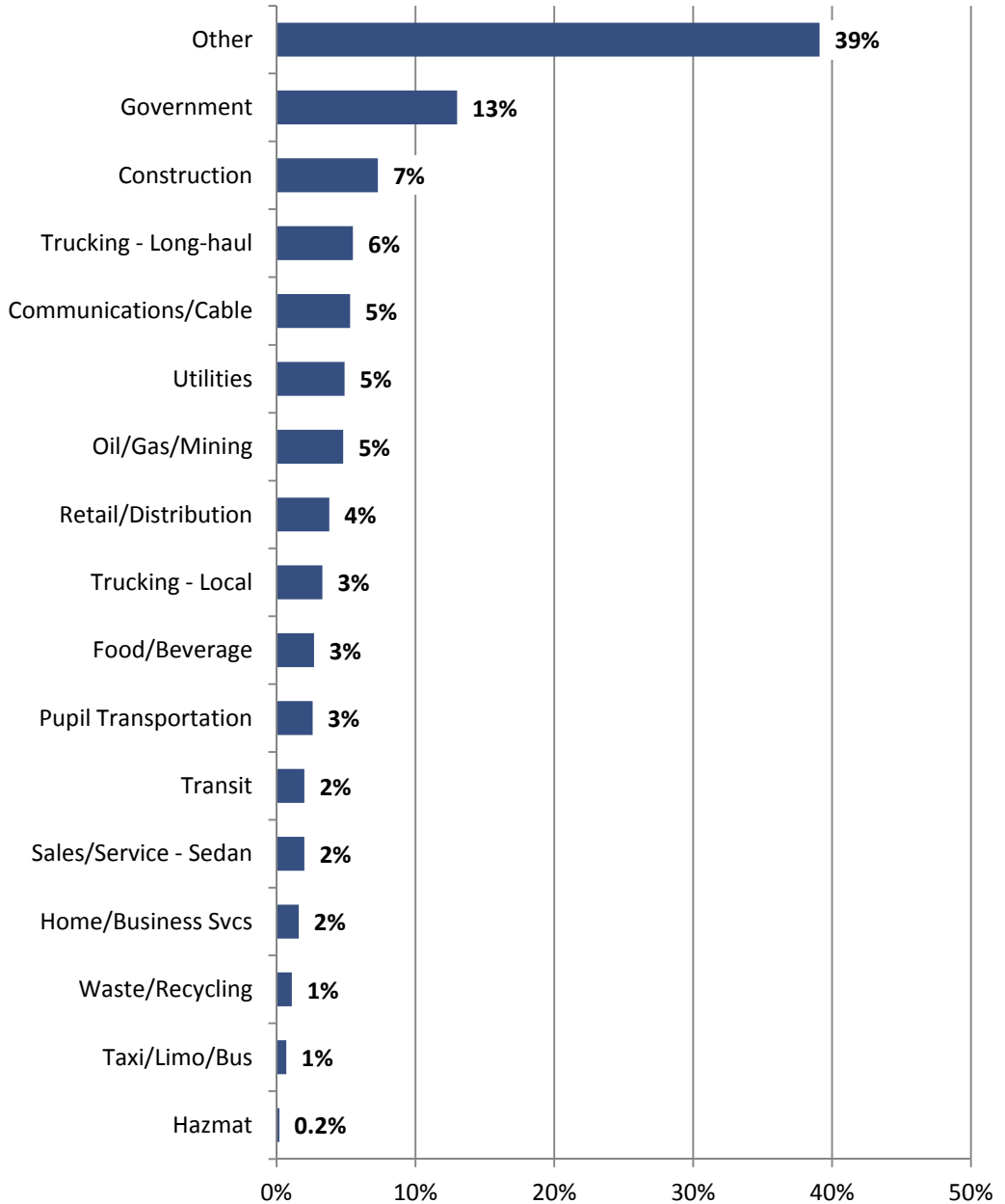
Distribution of device types among all respondents that equip employees with company-owned mobile devices:



3 Firmagraphic Summary

The 2013 survey results are based on responses submitted by 547 professionals in the safety, risk and fleet management disciplines from employers across a variety of different industries. 59% of responding companies had at least 1 employee subject to FMCSA regulations. 41% had 0 employee drivers subject to FMCSA regulations.

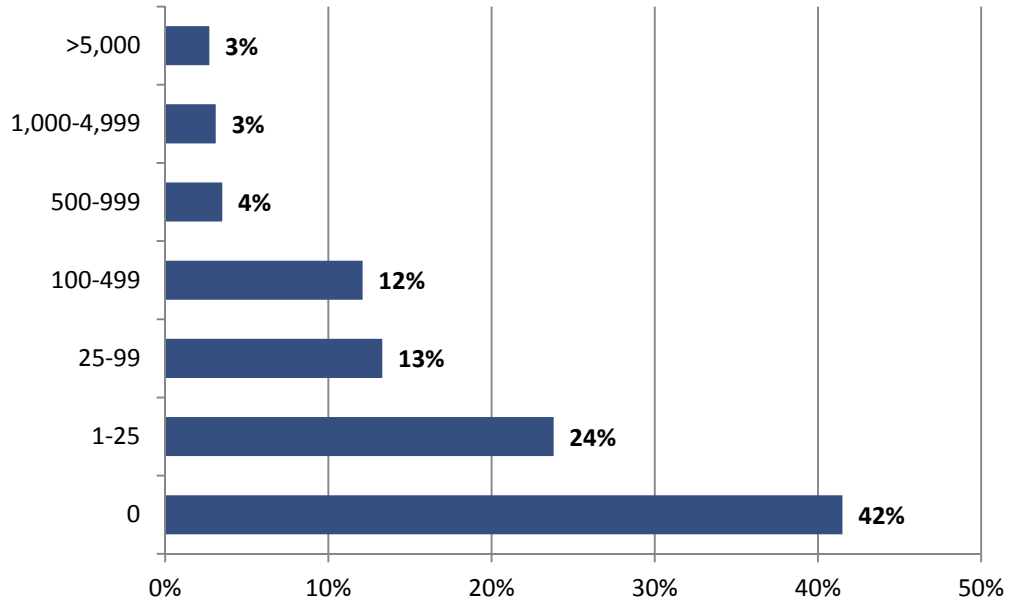
3.1 Industry



3.2 FMCSA-Regulated Fleet Size

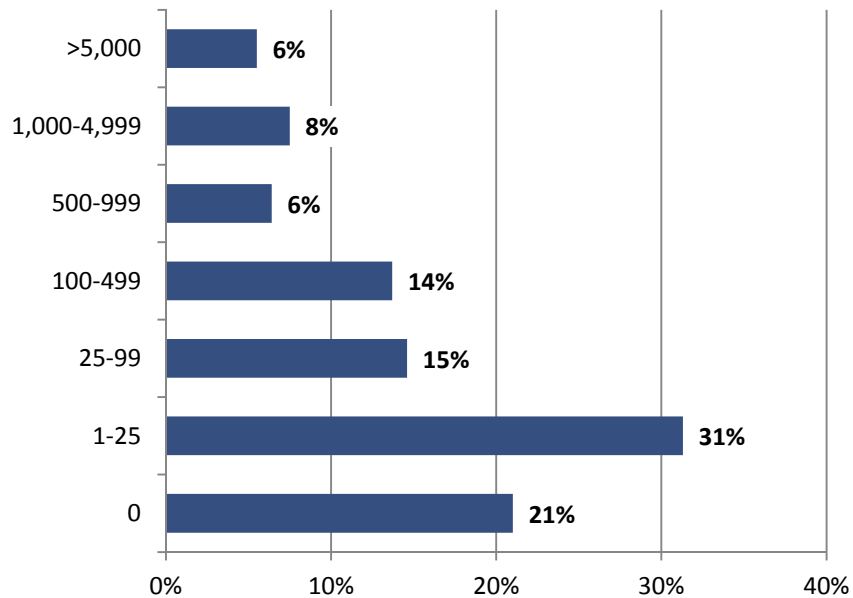
Of the FMCSA fleets:

- 63% were small with < 100 employee drivers
- 26% were medium with between 100 and 1000 drivers
- 10% were large with > 1000 employee drivers



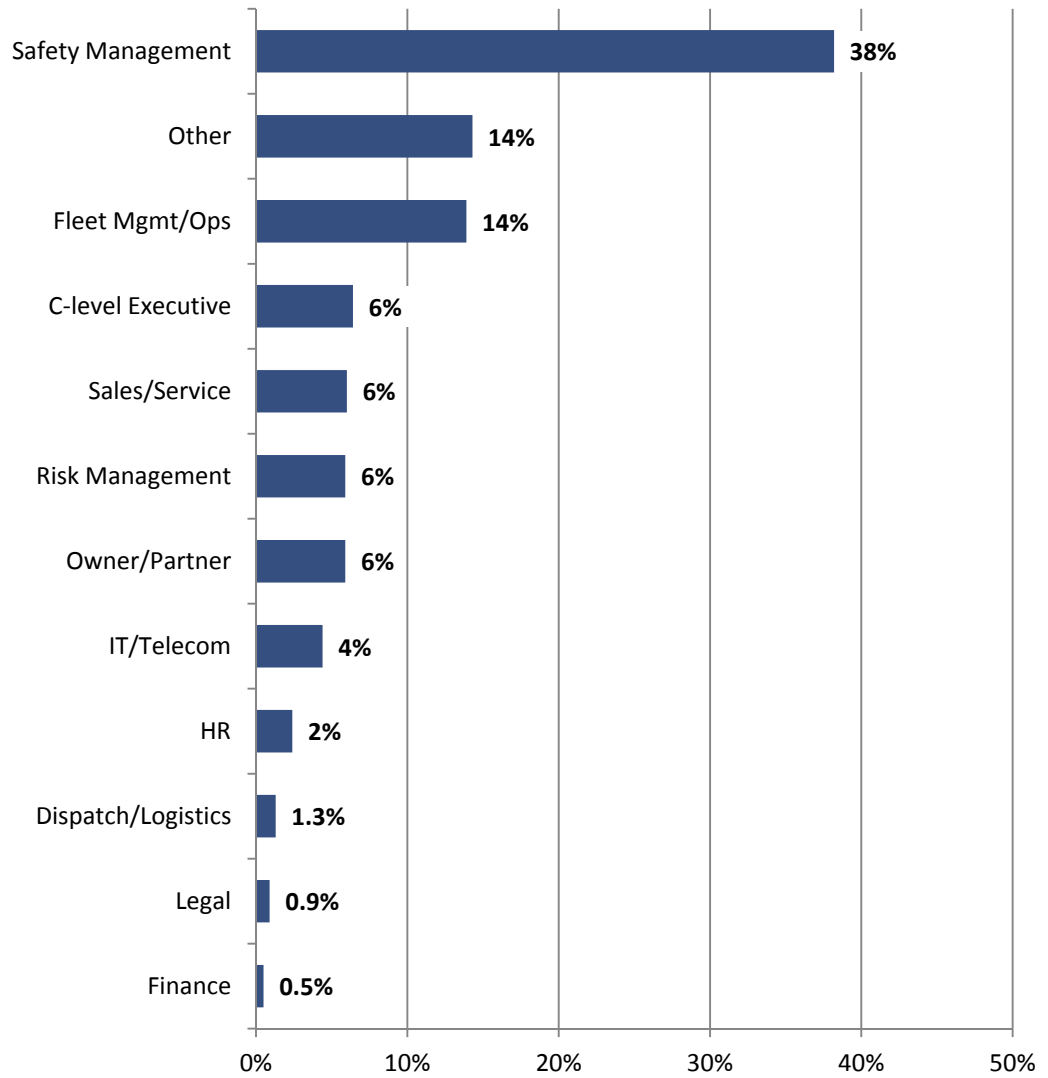
3.3 Non-FMCSA Fleet Size

Number of drivers within company fleets who are not subject to FMCSA regulations:



3.4 Role in Company

Respondents by job function:



AegisMobility

Suite 200, 8525 Baxter Place
Burnaby, BC V5A 4V7
Canada

+1 604 899 1008
www.aegismobility.com