

A photograph of a man and a woman in a rural setting at sunset. The man, wearing a patterned sweater and shorts, stands on the left, holding a camera up to take a picture of a vast field of tall grass. The woman, wearing a blue t-shirt and shorts, sits on the open rear door of a dark-colored SUV on the right, looking out towards the field. The sky is a mix of blue and orange, and the overall mood is peaceful and scenic.

NETSTAR

A SUBSIDIARY OF ALTRON

CONNECT REPORT 2020/21

A NEW ERA OF CONNECTIVITY

CONTENTS



CONNECT REPORT 2020/21

Introduction	03
A new era of connectivity	
Mobility Trends 2020/21	05
Navigating the Pandemic	07
The impact of COVID-19	
Retail Behaviour	09
New ways of shopping	
Closer to Home	11
Lockdown crime trends	
The Connected Life	12
Insights from a carmaker partnership	
Connected Innovation Approaches	17
Connected Fleets	21
Commercial opportunities	
Smart City Solutions	23
Partner Insights	25
The Netstar connectivity survey	
Conclusion	27
A central role for connected vehicles	

INTRODUCTION

A NEW ERA OF CONNECTIVITY

The ever-accelerating pace of technological innovation promises an era of mass, high-speed connectivity with the potential to not only boost human progress, but to reduce inequality and improve the living standards of all the world's people.

Narrowing the digital divide between the world's have and have-nots will involve empowering them with connectivity, giving everyone the ability to access information at will, wherever they are.

This next phase of human evolution sees us gaining a better understanding of ourselves and our society.

The Fourth Industrial Revolution (4IR) will not only connect people to each other and to sources of information. It will connect computers, machines, sensors, systems and other devices to the internet in a web of constantly updating data and information.

This is the Internet of Things (IoT). The oceans of data that IoT generates will equip humans to understand our world better and to make better-informed decisions about our place in it.

Artificial intelligence will enhance our ability to process this data and apply it in productive, human-centric ways that suit our needs.

While the term IoT may be new, the phenomenon of machines providing us with data is several decades old.

Netstar, as the founder of South Africa's stolen-vehicle recovery industry, has been involved with this discipline since 1994.

Telematics, the interdisciplinary field that uses telecommunications to report on vehicle movement and status, is one of the earliest forms of IoT.

We have been part of the evolution of telematics and the very genesis of IoT, from the days when radio-frequency (RF) transmission was the method of choice. This positions us perfectly to understand the trends shaping our society, our country and our world.

At the same time as connectivity is becoming indispensable, mobility has never been more important than it is now.



“
**MOBILITY HAS NEVER
BEEN MORE IMPORTANT
THAN IT IS NOW.**
”

The Covid-19 pandemic and the lockdown have made us painfully aware how dependant we are on fleets to bring cargo from source to the retailers that provide us with our essential goods.

Protecting that cargo, and ensuring it gets to us as efficiently as possible, is the realm of telematics and IoT.

These trends, their opportunities and their risks, are contingent on connectivity.

Our success as a society will depend on how well we connect to each other, and how well we use the information generated by the Internet of Things.

This, the Netstar Connect Report, is a view on the state of our connectivity, what our connected world can tell us, and where we are headed.

I trust you will find this report insightful and useful. Already, it is estimated¹ that 30 billion IoT devices will be connected to the internet by the end of 2020. IoT spend may reach \$15 trillion in the six years to 2025.

As always, the information that IoT generates is there to empower us. In a connected world, where information is becoming ubiquitous, the potential for our society is almost limitless.

**Let's stay connected, and keep learning.
Welcome to the Netstar Connect Report 2020.**

Pierre Bruwer
Netstar MD

MOBILITY TRENDS

IN 2020

It is an inescapable truth that this has been the year of Covid-19. The pandemic has tragically cost more than a million people their lives. The lockdown regulations introduced to mitigate its effects have also had their own dramatic impact on our economy and our way of life.

However, quite what the impact of the pandemic and the lockdown have been is best understood through data.

The telematic data gathered through our anonymised vehicle sensors and tracking devices, and the analysis conducted with our geospatial partners Geolnt (Geo Intelligence Corp) have given us some fascinating insights into the impact of the pandemic.

As the planet continues to battle the pandemic, certain social trends have embedded themselves in the human way of life. Others, which were once deemed inevitable, are suddenly off the table.



While it may still be too early to write the obituary of the modern office, working from home (WFH) has certainly proved its worth.

As most of us have learned over the past several months, it is eminently possible to run a business and to service clients remotely.

When the pandemic has run its course, it remains to be seen how we use this experience.

The downfall of the office-based economy would have enormous ramifications for industries such as automobiles, energy, finance and real estate. Even the fashion industry has seen massive impacts. If this change becomes permanent, the need to regularly update our wardrobes will vanish, with significant impacts for the garment trade.

Before the pandemic, many were predicting the end of private vehicle ownership. With the rise of on-demand vehicle services such as Uber, many predicted we would soon have no need to own and finance our own vehicles.

The health-and-safety concerns brought on by the pandemic have nipped these trends in the bud.

Understandably, many of us would far prefer to use our own vehicles than to use ride-sharing services where the risk of transmission may be higher.

This is borne out by our experience in markets such as Australia, where we have seen a significant drop in the numbers of tracking devices sold to ride-sharing operators.

Not everyone is able to afford private vehicle ownership, though. For public-transport commuters, IoT can be a lifesaving technology for monitoring safety compliance by drivers and other commuters.

Private travel trends differ from what we are seeing in commercial transport, freight and logistics. While many of us stayed home during the lockdown, our country's dedicated freight companies kept our retailers stocked with food and essential goods, even in the depths of the Level 5 Lockdown.

Since the relaxation of the lockdown, data from our commercial-fleet clients shows that logistics and road freight are returning to previous levels, even while private traffic remains depressed.

Spatial analysis conducted with GeoInt shows trends that say as much about human nature as mobility.

This underlines an essential truth about data – it is humanity made measurable.

NAVIGATING THE PANDEMIC

THE IMPACT OF COVID-19

Connected mobility offers a precious opportunity to measure the impact of the Covid-19 pandemic. Our telematics capabilities allowed Netstar to track around 300 000 vehicles during the lockdown, with data all anonymised for the purpose of reporting.

Our methodologies included gathering data around travel on local and national level by creating clusters from anonymised data about the location of ignition-on and -off events of clients fitted with tracking units. This enabled us to estimate trajectories between these events and gain insights into mobility, retail and criminal behaviour.

Data showed admirable compliance to lockdown protocols for several months.

Initial data immediately following South African president Ramaphosa's announcement of an imminent Lockdown on March 23 showed a spike in interprovincial travel in 890 municipal wards across South Africa.

We can interpret this as a surge in migrant workers and urban professionals returning to their home towns on the eve of the quarantine, where they likely planned to see out the lockdown – initially slated to last just three weeks.

From here, the movement of private vehicles almost ceased, reflecting a high level of compliance, and respect for the government's Covid-19 interventions.

890 Wards across South Africa experienced an increase in vehicle activity above the average daily numbers of the PreCOVID period.

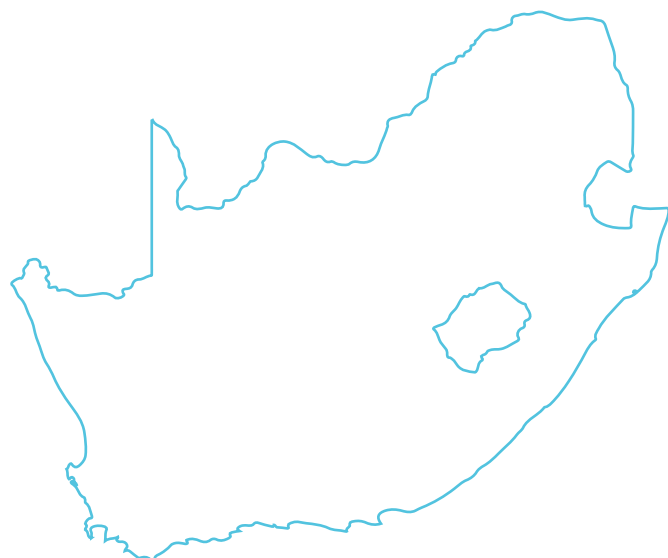
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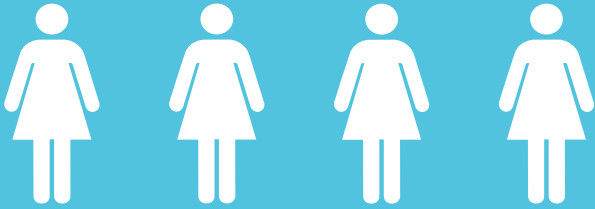
239

wards in KZN

174

wards in Eastern Cape





However, towards the end of Level 3, with Level 2 beckoning, there were clear signs of drivers beginning to disregard the restrictions on interprovincial travel.

On the Women's Day weekend² of August 8-10, before Level 3 was announced, we registered a significant uptick in crossings of provincial borders. This seems to reflect an element of people becoming fed up with the lockdown, anticipating the shift to Level 2, and also a possible relaxation of border policing.

For a period of a few weeks, KwaZulu-Natal became a destination province, with our data showing more incoming than outgoing traffic.



RETAIL BEHAVIOUR

NEW WAYS OF SHOPPING

Our analysis of movement trends on a local, ward level gave us interesting insights into shopping trends – predominantly food retail, an essential service that continued throughout the lockdown.

Most noticeable was a clear social distinction in the distance people needed to travel to get food – their only permitted outing, besides healthcare.

Lower-income areas showed far more movement than the higher-income areas.

This reflects the lower density of food retailers in poorer areas.

It may also reflect that retail workers themselves are more likely to come from lower-income areas, and were still required to travel to work despite the lockdown, whereas workers in more affluent areas had no need to travel, being able to work from home using their fibre or ADSL connections.

On the retail front, another interesting distinction was that certain retailers showed spikes in activity at particular times.

Of the Big Four retail brands, one particular retailer would show a spike in business during mid-morning hours, whereas another would spike in the late afternoon.

The curfew cut-off times were also clearly evident. By 6pm at the latest, people had completed their shopping.

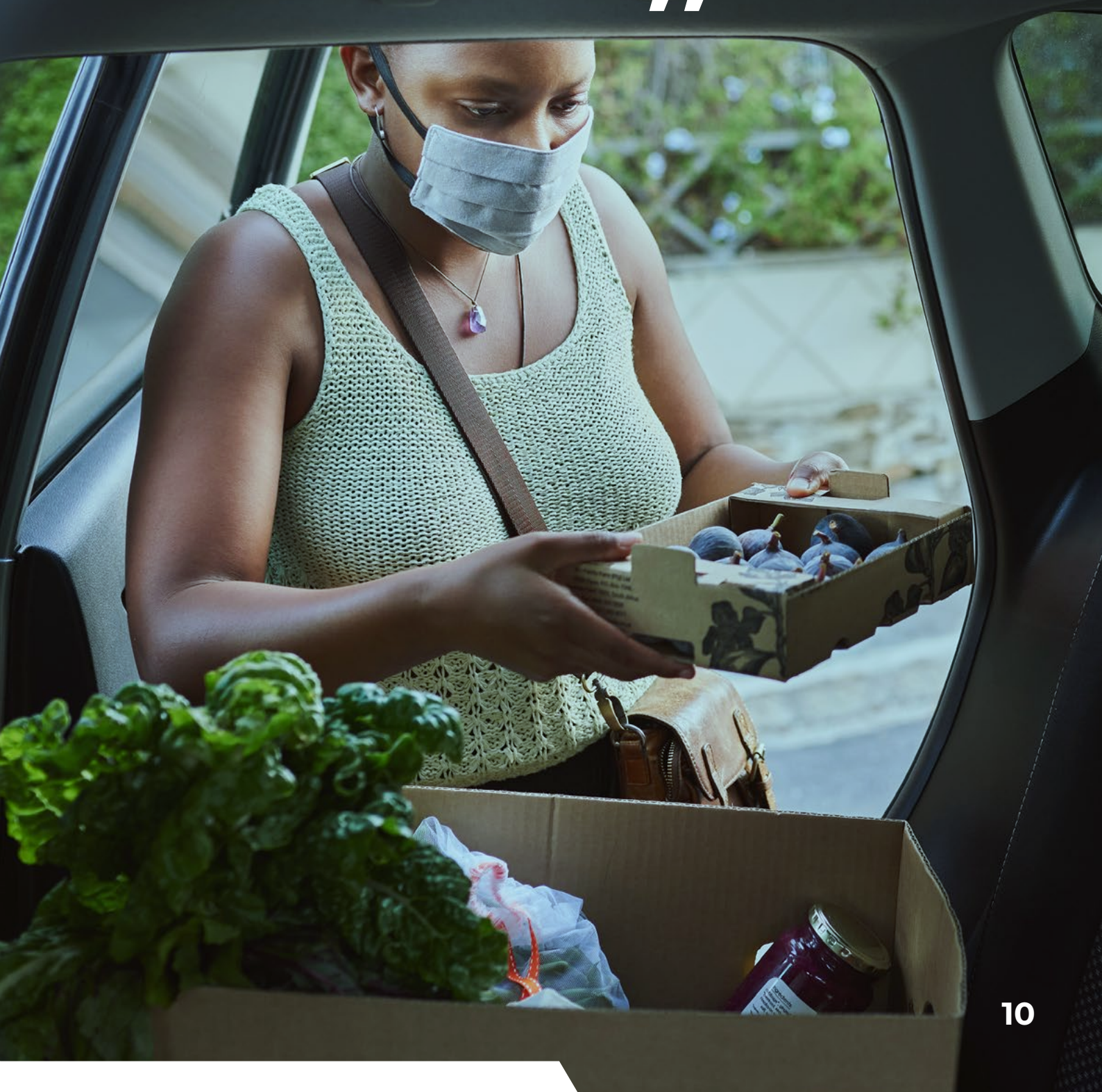
An unexpected trend was that these shopping patterns persisted even after the curfew was relaxed.

In many cases, we established a habit of doing our shopping earlier in the day, and we stuck to it. The days of doing an evening shop after a long day in the office may be over.

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**BY 6PM AT THE LATEST,
PEOPLE HAD COMPLETED
THEIR SHOPPING.**

”



CLOSER TO HOME

LOCKDOWN CRIME TRENDS

As a stolen-vehicle recovery specialist, Netstar is intimately in touch with real-time crime trends. The priority-crime data that we receive showed that the lockdown severely cramped the style of our country's criminals. For instance, incidents recorded in South Africa during the month of April showed a 71,8% drop from the previous month.

During the lockdown, criminal activity also showed a correlation with movement in general. Where there was more movement, there was a greater propensity for hijackings and vehicle theft, as reported by the Netstar data. The busier wards would generally tend to experience higher crime levels.

There were literally tens of billions of data points in the data set generated during the lockdown. This is the realm of Big Data.

Processing this amount of data in order to gain insights from it was no small task.

While the process was automated to a large extent, it's interesting to note that the data processing was not driven by Artificial Intelligence or machine learning. While the process did involve sophisticated procedural use of database technologies and specialised analysis technologies, it did not lend itself to machine learning.

Machine learning requires training a programme on a specific data set. However, COVID-19 was a completely unprecedented phenomenon. There was no a priori knowledge to use as a base reference.



Incidents recorded in South Africa during the month of April showed a 71,8% drop from the previous month.

THE CONNECTED LIFE

INSIGHTS FROM A CARMAKER PARTNERSHIP

As an IoT operator in the mobility space, Netstar is well situated to observe how connectivity is changing consumers' relationships with their cars.

A global partnership with major automaker Toyota has been instructive, allowing us to go beyond in-vehicle connectivity.

In partnering with Toyota, we've created a vehicle companion application.

By examining the travel preferences of passengers – or guests – we've been able to focus on making material, quality-of-life improvements using connected technology.

This approach has met with great success, and our South- African partnership has drawn interest from Toyota subsidiaries in Malaysia, Indonesia and Australia, as well as the brand headquarters in Japan.

The Toyota Connected project comes as many Original Equipment Manufacturers (OEMs) are exploring the connected-car space, and innovation in this area is helping to define what may become standard offerings in years to come.



While the guest experience is always paramount, in this era of UX primacy, the connected-vehicle approach also allows the OEM to acquire vast amounts of consumer data, from which the company can extrapolate consumer and mobility trends, and gain insights into how their vehicles operate in various conditions.

That information is all anonymised, but is used by engineering teams to build better motor vehicles and improve efficiencies to understand the mobility of their customers.

Our approach has been to build a network that transcends location.

At times, it happens to be mobile, but it integrates seamlessly with the user's devices and their home and office networks. The goal was to eliminate the idea of the vehicle as an intermediate stage where connectivity is lost, or where mobile data is expensive.

Now the vehicle functions as the hub of a connected life.

With the vehicle as a hub where multiple people can connect using their devices, the practical advantages are legion – everything from work to banking to information and entertainment is now available from the vehicle's mobile wi-fi hub.

But a significant evolution is in the realm of psychology, and attitude.

The truly connected vehicle creates an environment where young people have an affinity to the vehicle.

No longer do they fear the inconvenience, or the cost of being away from a fibre or ADSL router. With vehicle connectivity powered by chip SIM technology, the car becomes the hub.

Obviously, this also enhances their bond with the brand.

Always-on connectivity also generates the kind of data that can transform the product offering.

On a retail level, the customer can visit a virtual showroom within the companion app and shop for a new vehicle, apply for finance and calculate premiums.

Predictive service alerts ensure all maintenance schedules are followed, and the warranty remains valid. By analysing driver routines, the app can recommend the most convenient dealership, then schedule the service and book an Uber to get back to the office.

Connectivity also ensures optimum driver safety. Any vehicle fault codes are reflected on the companion app.

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**CONNECTIVITY
ALSO ENSURES
OPTIMUM
DRIVER SAFETY.**
”

If the vehicle is involved in an accident, roadside assist can contact the customer directly, and arrange suitable help at the location, based on the severity of the impact.

Back-end analytics will determine in real-time what repairs will be required, and then immediately manage the supply chain data and determine the closest dealership for optimal repair turnaround.

A man with a beard and curly hair is sitting in a car seat, looking out the window. The image is in profile, showing the man from the side. He is wearing a dark blue t-shirt. The background is a bright, slightly blurred outdoor scene, possibly a road or a landscape. The overall tone is warm and contemplative.

**“
THE OPPORTUNITIES
TO IMPROVE DRIVER
AND PASSENGER SAFETY
ARE GREAT. ”**

The next phase of connectivity sees carmakers enter the infotainment space.

An innovative model is to make in-vehicle content subscriptionless, packaged as part of the vehicle's content offering. If the guest gets a taste for it in the vehicle, they may sign up for the full service.

In the commercial mobility space, connectivity can revolutionise the industry. The minibus taxi industry, empowered with high-speed mobile broadband, can become a hub of news and educational content.

The opportunities to improve driver and passenger safety are great. Shift bosses can monitor driver vital signs via wearable devices. Drivers who appear stressed or tired can be assisted or asked to rest.

These interventions can be made on the fly, which can make public transportation safer.

With 35-40 road deaths daily, South Africa is a country with a horrendous road death toll.

Telematics and other connected technology is critical to improving our road-safety situation, as it helps to monitor driving behaviour and encourage safe driving in a way that is scientific and can be incentivised by insurers and corporates.

Industry standards in the connected-mobility arena are still taking shape. Whether connected mobility will ultimately be a proprietary, branded offering or a shared, interoperable system remains to be seen.

There are significant first-mover advantages for developers and service providers in this space, as well as for the companies best able to productively process the large amounts data generated from connected motoring.

CONNECTED INNOVATION APPROACHES

The next phase of connected mobility is seeing innovations in several categories, most driven by application-based technology.



Remote Control

A connected vehicle means the user is no longer necessarily the driver, and the vehicle becomes as much a lifestyle hub as a source of mobility.

Parcels can be delivered to a car, which can be opened from hundreds of metres away. Interior air-conditioning can be optimised to await passengers before they reach the car. Access and ignition can be keyless.

Vehicles can be located in larger parking areas, announcing themselves via the hooter or the headlights. Ambient lighting, seat and mirror positions can be personalised and refined using AI, as can navigation.



Electric Vehicles

With electric vehicles (EVs) already available in many markets including South Africa, charging is set to become a key consideration. Charge alerts will indicate when to charge the vehicle, where, and how much time to budget for the process.



Navigation

Navigation now comprises ongoing communication between vehicle and infrastructure, much of it automated.

The connected vehicle can now be expected to communicate with access gates at parking facilities, negotiating immediate, seamless access.

Parking payment is automated, as are fuel and charging transactions.



Safety

The safety advantages of connected mobility are clear. Geofencing functionality allows us to set time, speed and location alerts for loved ones or co-workers. Now a parent can have the reassurance of knowing their child is safe at university or on a night out, without the need for constant phone calls.

In the time of global pandemics, curfew alerts can be automated. Automatic roadside assistance and collision alerts ensure help arrives even when occupants may be incapacitated.

Connected mobility also allows constant video monitoring of scholar-transport services. Parents can now also have the peace of mind of being able to remotely monitor every minute of their child's school journey.

Netstar, for instance, has partnered⁴ with road-safety organisation Road Safety Partnership South Africa on a scholar transport project, providing telematics that will be monitoring the drivers of vehicles transporting learners to school in the KwaZulu-Natal province.

In the Western Cape, the Safe Travel to School Programme⁵ was developed by Childsafe, a child accident prevention organisation, in collaboration with Discovery Insure. The programme saw DQ Track devices, like the ones used by Discovery Insure clients, installed in the minibuses of scholar transport drivers. Drivers were incentivised to drive safely and monitored with telematics technology.

When comparing drivers on the Safe Travel to School Programme drivers with insured drivers in the five months to January 2015, programme drivers performed significantly better on the percentage of time that their speed exceeded the speed limit by 10%.



Maintenance and Vehicle Diagnostics

An app-driven brand ecosystem ensures servicing and maintenance are optimised.

The performance of a car can be monitored via remote diagnostics. Car manuals can be accessed from the companion app.

AI and image recognition can even be used for repair diagnostics using the smartphone camera.



Brand Experience

Always-on connectivity means a brand experience beyond the in-car, driving functionality. Retail support can be always accessible, and easy to finance and customise.

Car brands can push brand news, and other content into the vehicle. Rewards and special offers can incentivise good driving behaviour, or gamify responsible driving performance.



Insurance Synergies

The insurance industry has been an early adopter of technology to unlock the benefits of connected mobility.

Whether through connected vehicles or customer devices, insurers are now able to monitor driving behaviour and incentivise positive change.

The days of one-size-fits-all premiums are coming to an end, as clients now pay the premiums that their lifestyle and driving behaviour justifies.

Health and exercise goals can similarly be incentivised and rewarded. Essentially, products are now being customised to consumer needs.

“

**THE PERFORMANCE
OF A CAR CAN BE
MONITORED VIA REMOTE
DIAGNOSTICS. ”**



CONNECTED FLEETS

COMMERCIAL OPPORTUNITY

IoT and telematics already promise to be transformative for connected fleets. Vehicle tracking has been an industry standard since Netstar pioneered the sector in South Africa in 1994.

Fleet Intelligence

Obtained through telematics and IoT, enables a fuller understanding of logistics processes, where inefficiencies can be eliminated and how profitability can be optimised.

By monitoring driver behaviour, compliance and efficiency can also be ensured, crime can be minimised, and resources and scheduling can be managed most effectively.

Vehicle telematics has improved in leaps and bounds and offers the fleet manager significant value. Connectivity is now essential throughout the industry. Without it, transport and logistics companies would be working blind.

An example of this is a partnership between Netstar and Putco⁶.

The partnership was able to materially improve passenger safety by reducing accidents and also enhancing COVID-19 compliance through a network of onboard cameras.

Netstar telematics and fleet intelligence monitoring allow Putco to check that passengers and staff are following all hygiene and lockdown protocols during the pandemic.

The relationship between the two organisations began after Putco experienced a spate of fatal accidents along the Moloto road corridor between Gauteng and Mpumalanga.

Determined to reduce these incidents, Putco partnered with Netstar, leveraging telematics and technology to monitor its fleet and its drivers, in order to improve driver behaviour and save lives.



Fleet-management cameras, fuel-theft monitoring systems, and driver behaviour monitoring systems enabled Putco to track data on behaviours such as harsh braking and acceleration, which has helped to encourage best practice through training.

The technology-driven safety protocols saw Putco reduce accidents by 70%, and damage claims by 36%.

In the 2016/17 financial year, Putco reported 61 accidents, but by the end of December 2019, this number had dropped to 18.

However, driver connectivity, often used simply for monitoring – has other positive possibilities. Commercial drivers have long been isolated from the communications of their own companies, due to their long hours on the road. They spend days and weeks from their loved ones, with all the psychological and social costs this implies.

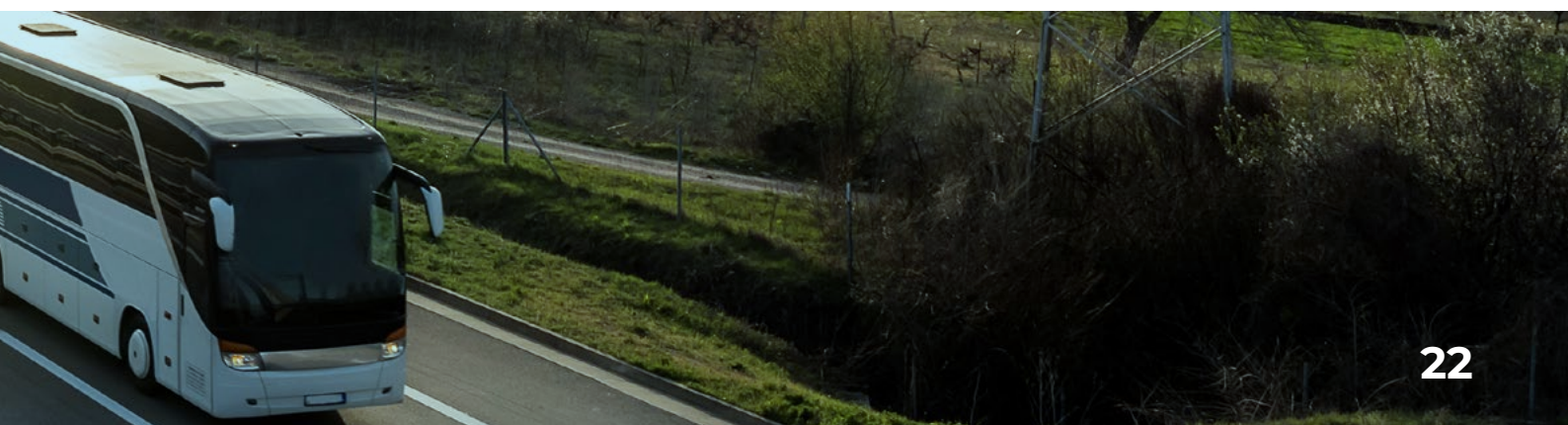
The profession has an image of lonely road warriors on the periphery of society. Connectivity offers a way to bring drivers back into the mainstream, incentivising and rewarding them, integrating them more closely with their organisations.

Free, centralised, high-speed connectivity in the vehicle allows the driver to connect to the internet via multiple devices. The employer can push content to the vehicle – training modules, webinars, email or online meetings. Drivers parked overnight at a truck stop can video-chat with their families, or complete an e-learning course.

Data, food or coffee vouchers can be offered as rewards incentives. The connected driver feels part of something, more engaged with their loved ones and their business family. Once again, technology offers a chance to recognise the humanity of our people, to enrich their experience and to enhance industrial relations

With the precision monitoring of connected fleets, precision maintenance can be used to improve profitability.

A vehicle operating in an area with high dust content, for instance, can provide data on oil viscosity that can be used to help other vehicles to operate better in those conditions. Servicing schedules can be adjusted to ensure a longer life for the vehicles.



SMART CITY SOLUTIONS

The Internet of Things carries enormous macro implications for our society, and in a mobile world, vehicles are a key part of this.

Urban planning, social services and policing policy can be informed by the data generated by connected vehicles, in constant communication with each other, with transport infrastructure and with network centres.

In a country where the digital divide still disadvantages less affluent communities, the connected vehicle can function as a mobile wi-fi hotspot.

This service can also be monetised, with blockchain technology keeping ledger accounts of micropayments for wi-fi use.

Connected cars and connected fleets can help support broadband penetration and enhance digital integration in smart cities.

The efficiency benefits of IoT for resource-strapped African cities can also be important. In other markets, the IoT dividends are already apparent.

In Australia, IoT is helping to usher in the era of smart cities through smart metering and location-based services in retail centres.

In the Australian home market, smart meters are used to keep local councils informed of the levels of refuse in bins. Automated homes are gaining momentum, with major retailers promoting the idea aggressively.

Anonymised tracking data is supplied by map suppliers to Australian government agencies to assist with traffic planning, and the range of IoT sensors available via unregulated carriers is increasing exponentially, with players like Microsoft (Azure IoT Hub) simplifying the consumption and display of recorded data in this segment.

Business and government have also seen the value of harnessing the power of telematics data to ensure that assets are used optimally across all vehicle categories. SMEs are adopting telematics solutions and a significant uptake of camera-based solutions is evident.



The Australian market differs from South Africa's in that it has few vehicle-theft challenges, so the sector is oriented towards accident prevention, asset productivity and compliance.

AI and edge computing are becoming more affordable and initial application thereof is becoming visible in some products. As the technology matures, it should play a more significant role in the Australian market.

Netstar Australia has found significant demand for tailored solutions to address specific enterprise customers, including versatile products enhanced to suit small-to-medium enterprises.

Worldwide it has been shown how IoT can drive traffic-light synchronisation to refine traffic flows, and how urban planning can be based on empirical, real-time data from connected vehicles for the benefit of all residents.

Autonomous vehicles, when they make their appearance, will be connected vehicles. Automated road mobility is driven by intra-vehicle communication and Car-to-X functionality, and today's connected vehicles are a key part of building this ecosystem for tomorrow.

PARTNER INSIGHTS

THE NETSTAR CONNECTIVITY SURVEY

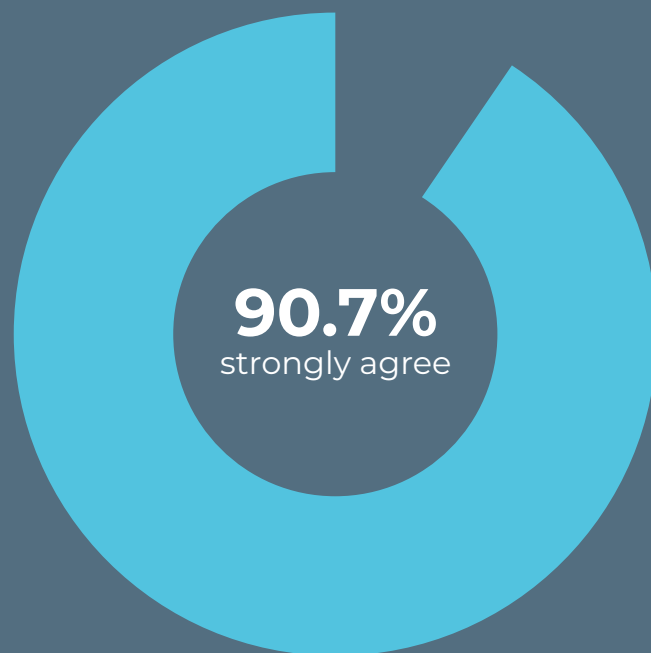
To get an idea of the sentiments of our industry partners about the role of telematics, connectivity and IoT in modern business, we conducted a survey of mobility professionals, executives, clients and customers.

Respondents included private individuals, customers, professionals and executives working in the fleet-management space.

Respondents were almost unanimous on two fundamental issues. The importance of mobility to keeping the economy moving, and the need to protect people and goods while they are on the move.

Of the 78 respondents, 73 of them – or **98,3%** – **agreed that mobility and transportation were critical to the functioning of the economy.**

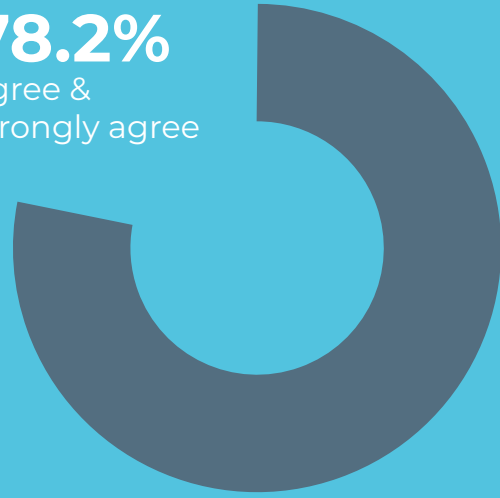
At the same time, 90,7% strongly agreed that safety and security are important to quality of life, with almost 100% agreeing that it was important.



In the personal-mobility and security space, there was clear awareness of the role of telematics and IoT in protecting lives and property.

When asked whether they felt that their families were safer with a vehicle tracker installed, a total proportion of 78,1% agreed.

78.2%
agree &
strongly agree



In the commercial-mobility context, the majority of respondents showed concern for the safety and welfare of their staff (74,7%) and for the impact of stolen goods on their customers (67,9%).

While these sentiments reflect concern for the people and goods they are responsible for, and an awareness of the societal reality of crime in the country, respondents also showed they were confident in the predictive ability of technology to help address crime.

When asked whether they agreed or disagreed that data analytics and AI could predict criminal activity before it happens, a combined proportion of 64,9% of respondents either agreed, or strongly agreed.



CONCLUSION

A NEW ROLE FOR CONNECTED VEHICLES

Connected mobility via telematics and the Internet of Things has already transformed the security and efficiency of driving. It is also in the process of transforming the private and commercial driving experience, and the role of vehicles within our cities.

The vast amounts of data provided by the connected vehicle also allows businesses to refine their decision-making.

The consensus among entrepreneurs and professionals is that telematics and IoT is now fundamental to business success.

Government policy can also be shaped by the data that connected vehicles provide.

The next opportunity for service providers in the connected mobility sector is in Big Data. With multiple devices, sensors and users constantly generating real-time data, the true differentiator will not lie simply in the provision of hardware or software.

Connectivity is now non-negotiable.

The mobility leaders of the future will be those organisations that can sift and analyse the data, interpret it and apply its insights for the benefit of drivers, organisations and society at large.

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