RESEARCH PROFILE

WHAT DOES AN AVERAGE FLEET CONSIST OF? WHAT ARE COMMONLY OUTSOURCED SERVICES, AND HOW DO FLEETS REMARKET THEIR VEHICLES? EXPLORE THIS AND OTHER STATISTICS IN THIS FLEET OVERVIEW SECTION, WHICH INCLUDES RESPONSES FROM MORE THAN 200 SURVEYED FLEETS.

Information for this overview of the public fleet industry comes from the 2012 *Government Fleet* Industry Profile survey, which had more than 200 responses. City fleets comprise nearly half of all fleets surveyed, and more than a quarter of fleets service areas of less than 50,000 people.

Some highlights from this section: Budgets have increased for 17% of fleets who responded, mostly due to increased fuel costs and increased labor costs, but also, in one case, to increased fleet size due to an insourcing contract. The most commonly outsourced service is body and paint work, with 86% of fleets reporting they send out this type of work. Finally, use of in-house and local auctions are tied in use with online auctions for remarketing, and many fleets opt for both methods.

From tool allowances to common customer departments, *GF* compiled a profile of the average fleet operation based on survey respondents and broke down data based on population size, agency type, and fleet size.

SOURCE: 2012 INDUSTRY PROFILE SURVEY

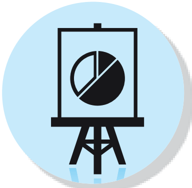
26% SERVE A POPULATION SIZE OF LESS THAN 50,000 PEOPLE

$2.9 MILLION MEDIAN FLEET BUDGET (LESS CAPITAL)

376 UNITS MEDIAN ROLLING STOCK FLEET SIZE

65% OF FLEETS HAVE A FORMAL REPLACEMENT PROGRAM

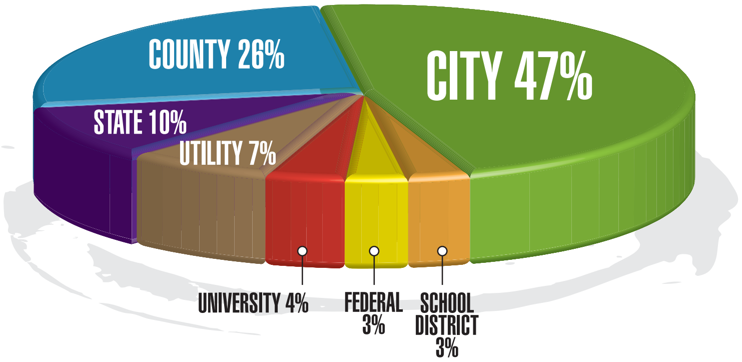
67% OF FLEETS ARE AN INTERNAL SERVICE FUND



FLEETS BY AGENCY TYPE

Nearly half of all fleet agencies reporting their information are city agencies, while school districts and federal fleets are the least common fleets analyzed. Each state agency that manages its own fleet reported separate numbers. These agencies include Department of Transportation, Motor Pool, and Administrative fleets. Universities are counted separately.

*DATA WAS COLLECTED FROM *GF* READERSHIP AND MAY NOT REFLECT ENTIRE INDUSTRY TOTALS.



MEDIAN ANNUAL BUDGET (LESS CAPITAL) BY AGENCY TYPE

CITY $2,100,000

COUNTY $3,487,818

STATE AGENCY $8,000,000

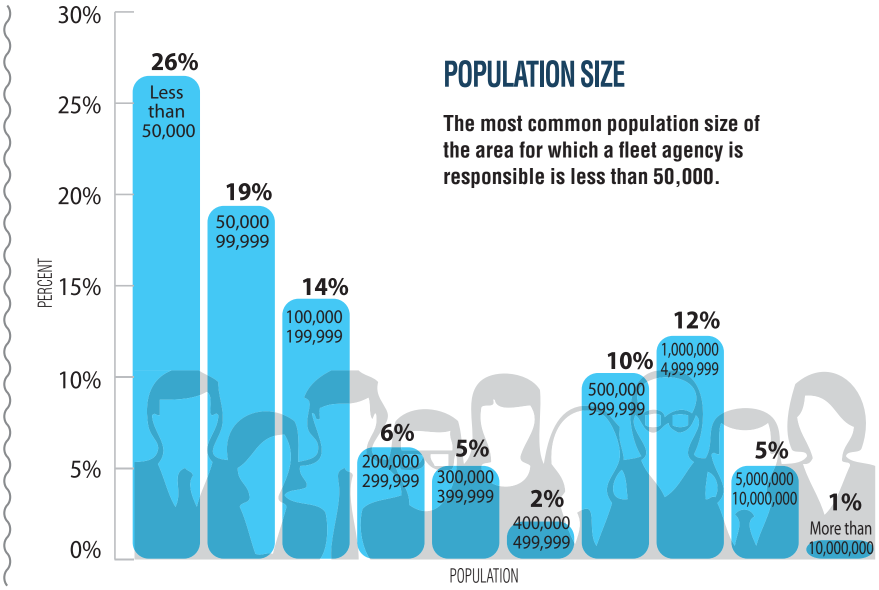
FEDERAL* $5,050,000

City fleets have the smallest budget, while state agencies are reported to have the largest budgets.

*LOW RESPONSE RATE MAY INFLUENCE AVERAGE.

POPULATION SIZE

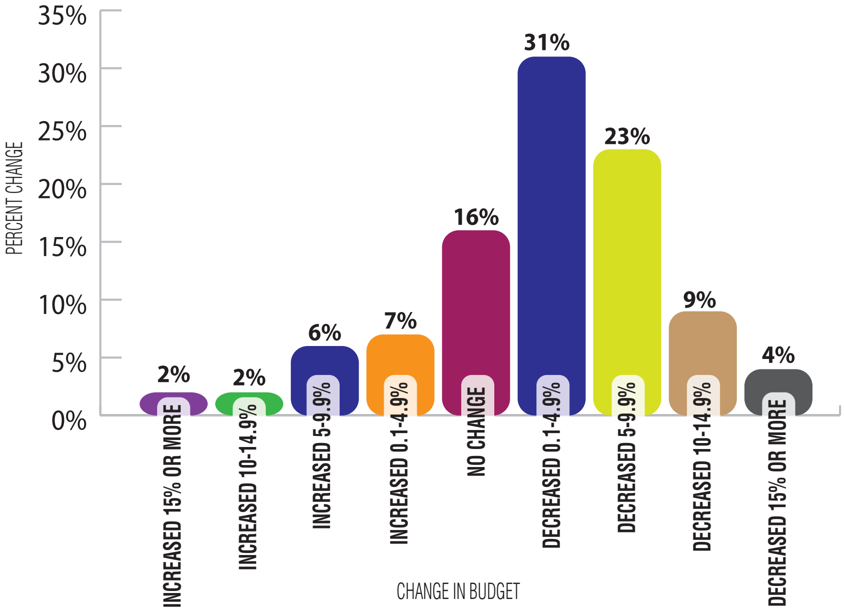
The most common population size of the area for which a fleet agency is responsible is less than 50,000.



CHANGE IN ANNUAL BUDGET* (LESS CAPITAL)

Seventeen percent of respondents reported an increase in budget, while 67% reported a decreased budget. Fleet managers cited rising fuel costs more than any other factor as the reason for their increased budgets. Other factors identified include higher maintenance costs due to aging vehicles, increased labor costs, and additional work through insourcing. One reason cited for reduced costs is improved efficiencies.

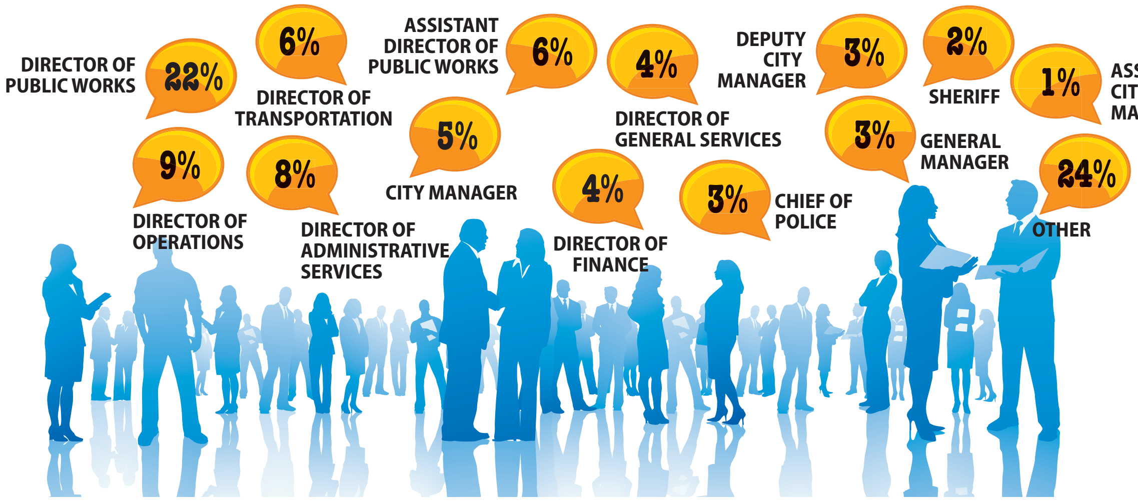
*CURRENT FISCAL YEAR VS. PREVIOUS FISCAL YEAR



fleet overview

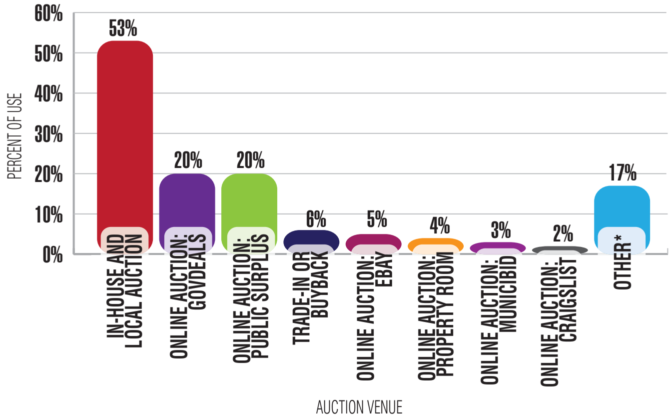
SOURCE: INDUSTRY PROFILE SURVEY

TITLE OF SUPERVISOR OVERSEEING FLEET MANAGEMENT

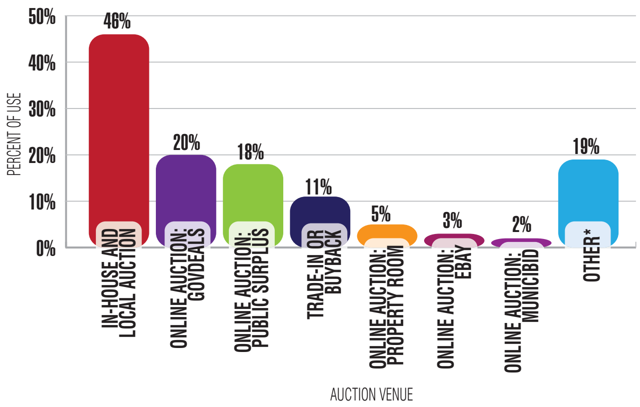


The most common agency overseeing fleet services is Public Works, with 28% of fleet managers reporting to its director or assistant director. This data is calculated from actual titles reported. Variances in titles are included in the "other" category.

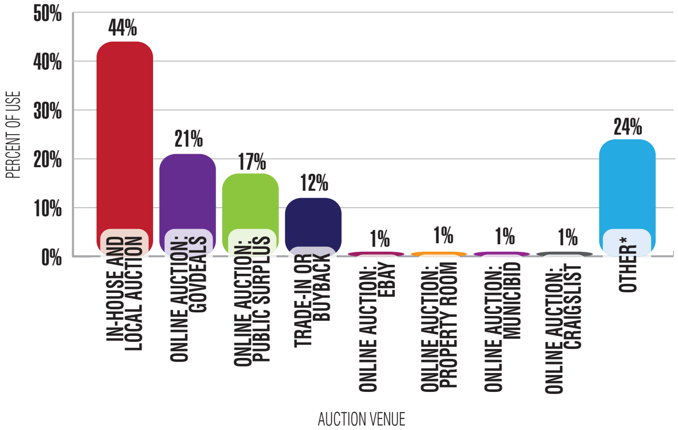
AUCTION VENUES FOR LIGHT-DUTY VEHICLES



AUCTION VENUES FOR HEAVY-DUTY VEHICLES (EXCLUDING OFF-ROAD EQUIPMENT)



AUCTION VENUES FOR OFF-ROAD VEHICLES



For online remarketing, Govdeals and Public Surplus are the most commonly used auction websites. In-house and local auctions and online auctions prove to be in use equally.

*OTHER REMARKETING SERVICES INCLUDE SEALED BIDS, RECYCLE PROGRAMS, AND OTHER ONLINE AUCTION SOURCES.

MORE THAN ONE RESPONSE POSSIBLE

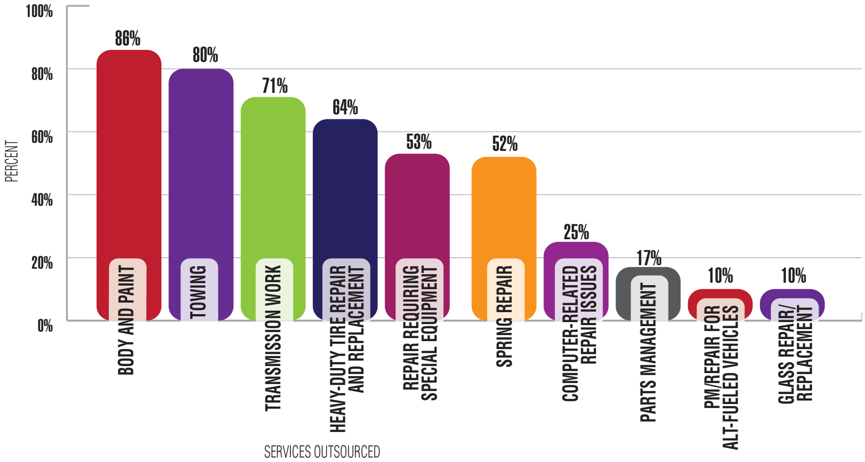
PERCENT OF ANNUAL BILLED TECHNICIAN HOURS

72%

Out of a total 2,080 possible billable hours, fleet managers surveyed reported that technicians bill on average 72%, or about 1,500 hours annually.

SOURCE: INDUSTRY PROFILE SURVEY

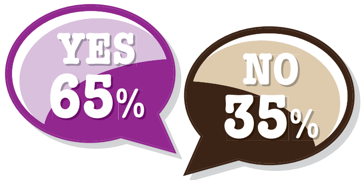
SERVICES OUTSOURCED



The most commonly outsourced fleet function is body and paint work, followed by towing. Other outsourced repairs not listed here but reported by fleet managers include major engine repairs, welding, wheel alignments, warranty work, detailing, washes, and component rebuilds.

MORE THAN ON RESPONSE POSSIBLE. PERCENTAGES INCLUDE THOSE FLEETS THAT OUTSOURCE ALL MAINTENANCE WORK.

FORMAL REPLACEMENT PROGRAM

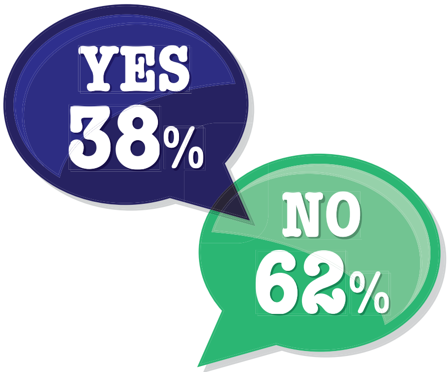


BREAKDOWN BY AGENCY TYPE

CITY	YES	63%	NO	37%
COUNTY	YES	66%	NO	34%
STATE AGENCY	YES	77%	NO	23%
UTILITY	YES	50%	NO	50%

Data shows that utility fleets are least likely to have a formal replacement program.

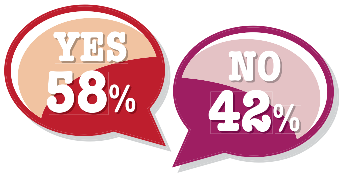
PROVIDES TOOL ALLOWANCE



$500

MEDIAN ANNUAL TOOL ALLOWANCE PER TECHNICIAN FOR AGENCIES THAT OFFER IT

AGENCIES REQUIRING TECHNICIANS TO PROVIDE THEIR OWN TOOLS

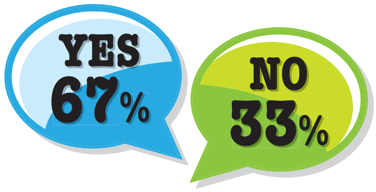


BREAKDOWN BY AGENCY TYPE

CITY	YES	62%	NO	38%
COUNTY	YES	65%	NO	35%
STATE AGENCY	YES	46%	NO	54%
UTILITY	YES	50%	NO	50%

More cities and counties require technicians to provide their own tools than other fleet agency types.

INTERNAL SERVICE FUND



BREAKDOWN BY AGENCY TYPE

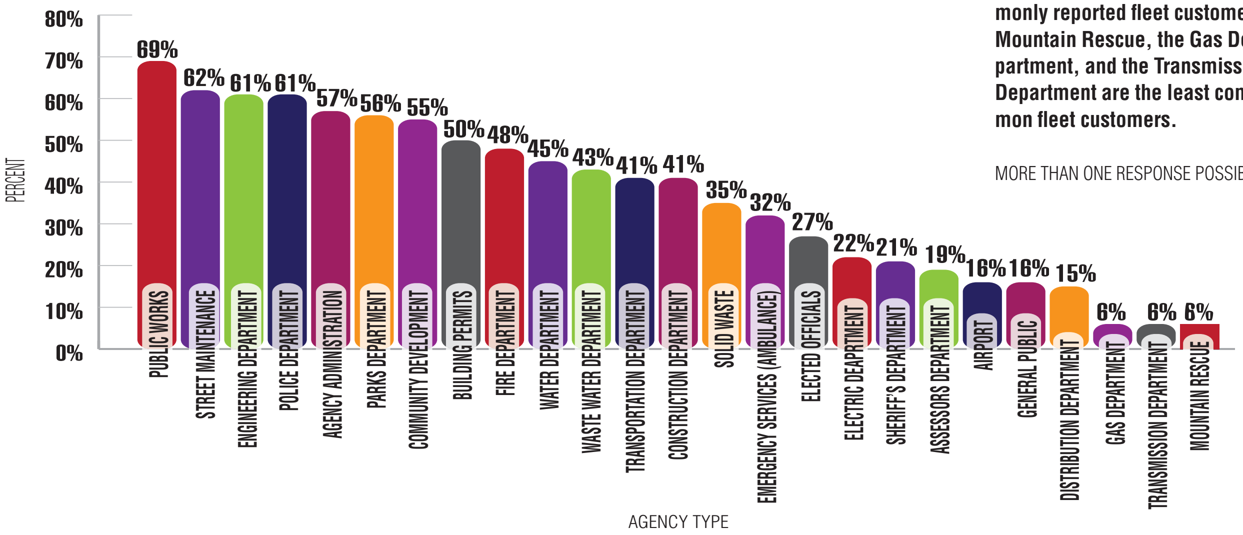
CITY	YES	71%	NO	29%
COUNTY	YES	66%	NO	34%
STATE AGENCY	YES	75%	NO	25%
UTILITY	YES	57%	NO	43%

City fleets are more likely to have internal service funds than County fleets.

fleet overview

SOURCE: INDUSTRY PROFILE SURVEY

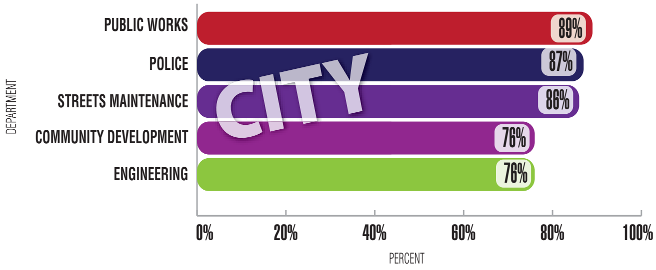
FLEET CUSTOMER DEPARTMENTS

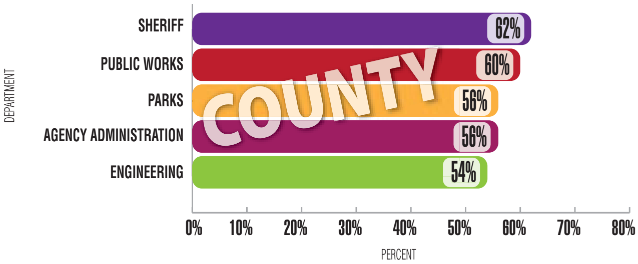


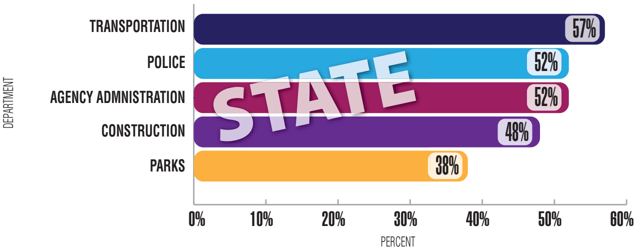
Public Works is the most commonly reported fleet customer. Mountain Rescue, the Gas Department, and the Transmission Department are the least common fleet customers.

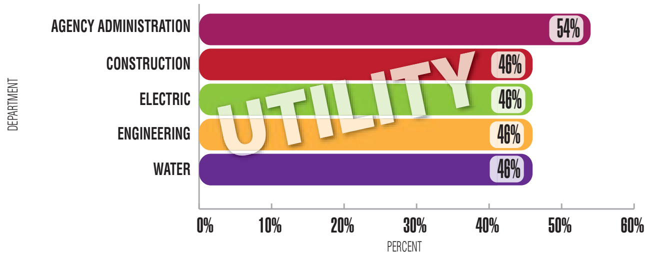
MORE THAN ONE RESPONSE POSSIBLE.

TOP 5 CUSTOMERS BY AGENCY TYPE



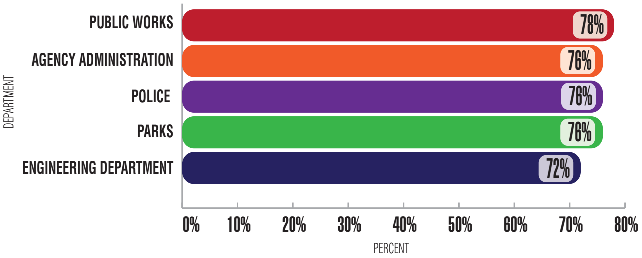




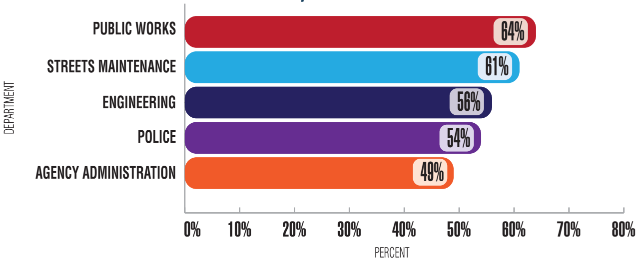


Public Works is on the top 5 customers list for both cities and counties, and another common overlapping department is Engineering. For state and utility fleets, Transportation and Agency Administration top the list, respectively. MORE THAN ONE RESPONSE POSSIBLE.

TOP 5 CUSTOMERS BY LARGE FLEETS



TOP 5 CUSTOMERS BY SMALL/MEDIUM FLEETS



Broken down by fleet size, Public Works is the most common customer for all fleet sizes. For this ranking, "Large" is defined as more than 1,000 vehicles, while "Small/Medium" is defined as 1,000 vehilces or fewer. MORE THAN ONE RESPONSE POSSIBLE.