

2021 GF Industry Profile Study

1.

Thank you for participating in *Government Fleet's* annual industry survey! This survey allows fleet professionals to see the industry on a national scale, compare data with other fleets, and follow changes in the industry. The results of this survey are anonymous. Information gathered will be aggregated for print and online publication.

We estimate this survey will take 20-25 minutes to complete. If you are unable to complete a question, please skip it and move on. You can [download and complete the PDF beforehand](#) in order to complete this survey in one sitting. **It is open to government fleet managers, but we are not accepting responses from school bus fleets at this time.**

The survey deadline is **Wednesday, June 16, 2021**.

E-mail Thi.Dao@bobit.com if you have any questions. To view responses from previous years, visit the [Statistics section of *Government Fleet* magazine](#).

Who should fill out this survey? Government fleet professionals, whether you're a fleet supervisor or director, with knowledge about your fleet's budget, shop management, remarketing methods, etc. Limit one response per agency.

* 1. What kind of fleet do you work for?

- Public/government fleet (excluding school bus)
- Company overseeing fleet maintenance/management for a public agency (excluding school bus)
- School bus fleet
- Private fleet

2. Please provide us with the following information:

Name:	<input type="text"/>
Title:	<input type="text"/>
Phone:	<input type="text"/>
Email:	<input type="text"/>
Agency Name:	<input type="text"/>

3. What state/province are you located in?

4. What best describes your fleet?

5. Is your fleet an internal service fund?

Yes

No

6. What is your annual budget (please do not include capital budget)?

7. What is your change in annual budget (less capital) of your current fiscal year versus previous fiscal year?

Increased more than 15%

Increased 11-15%

Increased 6-10%

Increased up to & including 5%

No change

Decreased up to & including 5%

Decreased 6-10%

Decreased 11-15%

Decreased more than 15%

If there is a significant increase or decrease, let us know why:

8. Does your agency have a replacement program/fund?

Yes

No

9. What is your replacement budget this year?

10. What is your change in replacement budget of your current fiscal year versus previous fiscal year?

- Increased more than 15%
- Increased 11-15%
- Increased 6-10%
- Increased up to & including 5%
- No change
- Decreased up to & including 5%
- Decreased 6-10%
- Decreased 11-15%
- Decreased more than 15%
- N/A

If there is a significant increase or decrease, let us know why:

11. Is your replacement budget this year fully funded?

- Yes
- No

Optional comment

12. Which operational and business actions have you taken in response to COVID-19 (from March 2020 to now)?

(Please select all that apply.)

- | | |
|---|--|
| <input type="checkbox"/> Lay off employees | <input type="checkbox"/> Outsourcing more |
| <input type="checkbox"/> Furlough employees | <input type="checkbox"/> Outsourcing less |
| <input type="checkbox"/> Cut back hiring | <input type="checkbox"/> Staff can work from home |
| <input type="checkbox"/> Cut back shifts | <input type="checkbox"/> Conducting more meetings over Internet or phone |
| <input type="checkbox"/> Cut back training | <input type="checkbox"/> Limited or eliminated business travel |
| <input type="checkbox"/> Delayed vehicle purchases | <input type="checkbox"/> Don't know/Not sure |
| <input type="checkbox"/> Closed facility/facilities | |
| <input type="checkbox"/> Deferred capital investments | |
| <input type="checkbox"/> Other (please specify) | |

- None of the above

13. Which operational and business actions do you anticipate will still be in effect throughout 2021 and into 2022? (Please select all that apply.)

- | | |
|---|--|
| <input type="checkbox"/> Lay off employees | <input type="checkbox"/> Outsourcing more |
| <input type="checkbox"/> Furlough employees | <input type="checkbox"/> Outsourcing less |
| <input type="checkbox"/> Cut back hiring | <input type="checkbox"/> Staff can work from home |
| <input type="checkbox"/> Cut back shifts | <input type="checkbox"/> Conducting more meetings over Internet or phone |
| <input type="checkbox"/> Cut back training | <input type="checkbox"/> Limited or eliminated business travel |
| <input type="checkbox"/> Delayed vehicle purchases | <input type="checkbox"/> Don't know/Not sure |
| <input type="checkbox"/> Closed facility/facilities | |
| <input type="checkbox"/> Deferred capital investments | |
| <input type="checkbox"/> Other (please specify) | |

None of the above

14. What is the human population in the area your agency is responsible for? (i.e., the population of the city/county/state/university you work for)

15. What is your rolling stock fleet size? (Rolling stock should include any vehicles/equipment that require an operator or license and consume fuel. Include vehicles, loaders and construction equipment, large lawnmowers, etc.; exclude trailers, chainsaws, small lawnmowers, etc.)

16. What is your fleet makeup by vehicle type? (Sum should add up to the "rolling stock" range in Question 15).

Passenger cars/SUVs

Compact vans (e.g., Transit Connect, Promaster City)

Full-size vans (e.g., Sprinter, Transit)

Light-duty trucks (Class 1-2)

Medium-duty trucks (Class 3-6)

Heavy-duty trucks (Class 7-8)

Off-road equipment (e.g., construction and large grounds maintenance)

Misc./Other

17. What is your fleet makeup by fuel type? (Sum should add up to the "rolling stock" range in Question 15).

Gasoline

Diesel

Hybrids

Plug-in electric vehicles (including battery-electric vehicles and plug-in hybrids)

Natural gas (including CNG, LNG, RNG)

Propane autogas or liquefied petroleum gas (LPG)

E-85 flex-fuel vehicle

Other

18. How many drones does your agency have?

19. If your agency has drones, do fleet staff maintain them?

- Yes
- No
- We do not have drones

Optional comment

20. What percentage of your ON-ROAD fleet is leased?

0 100

21. What percentage of your OFF-ROAD fleet is leased?

0 100

22. What percentage of your ON-ROAD vehicles have telematics devices?

0 100

23. Has your fleet size changed in the past year?

- Increased
- Decreased
- Stayed the same

If it has increased or decreased explain by how much (use percentage) and why

24. What is the title of the person in charge of fleet management?

- Fleet director
- Fleet administrator
- Fleet & facilities manager
- Fleet chief
- Fleet manager
- Fleet supervisor
- Fleet superintendent
- Other (please specify)

25. What is the title of the person the Fleet Manager/Director reports to?

- Assistant Director of Public Works
- Chief of Police
- City Manager
- Deputy City Manager
- Director of Administrative Services
- Director of Finance
- Director of General Services
- Director of Operations
- Director of Public Works
- Director of Transportation
- General Manager
- Mayor
- Other (please specify)

26. Who are your customers? (Check all that apply)

- | | | |
|--|--|--|
| <input type="checkbox"/> Agency Administration | <input type="checkbox"/> Emergency Services
(ambulance) | <input type="checkbox"/> Public Works |
| <input type="checkbox"/> Airport | <input type="checkbox"/> Engineering Department | <input type="checkbox"/> Sheriffs Department |
| <input type="checkbox"/> Assessors Department | <input type="checkbox"/> Faculty/Staff/Students | <input type="checkbox"/> Solid Waste |
| <input type="checkbox"/> Building Permits | <input type="checkbox"/> Fire Department | <input type="checkbox"/> Streets Maintenance |
| <input type="checkbox"/> Community Development | <input type="checkbox"/> Gas Department | <input type="checkbox"/> Transmission Department |
| <input type="checkbox"/> Construction Department | <input type="checkbox"/> General Public | <input type="checkbox"/> Transportation Department |
| <input type="checkbox"/> Distribution Department | <input type="checkbox"/> Mountain Rescue | <input type="checkbox"/> Waste Water Department |
| <input type="checkbox"/> Elected Officials | <input type="checkbox"/> Parks Department | <input type="checkbox"/> Water Department |
| <input type="checkbox"/> Electric Department | <input type="checkbox"/> Police Department | <input type="checkbox"/> Other Government Agencies |

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2. FLEET PROFILE

27. How many maintenance facilities does your agency have?

28. How many technicians do you have allocated? Write "N/A" if you do not oversee maintenance staff.

29. How many technician positions are filled? Write "N/A" if you do not oversee maintenance staff.

30. ASE Certifications

	Yes	No
Is your agency ASE Blue Seal certified?	<input type="radio"/>	<input type="radio"/>
Does your agency require technicians to have ASE certifications?	<input type="radio"/>	<input type="radio"/>
Do you provide incentive pay for those who have ASE certifications?	<input type="radio"/>	<input type="radio"/>

If you use another equivalent certification, please let us know here and answer the questions above.

31. Does your agency provide employees with (or allowances for):

	Yes	No
Tools	<input type="radio"/>	<input type="radio"/>
Uniforms	<input type="radio"/>	<input type="radio"/>

32. What services do you normally outsource to an outside service provider? (check all that apply)

- | | |
|---|--|
| <input type="checkbox"/> Heavy-duty tire repair and replacement | <input type="checkbox"/> Welding |
| <input type="checkbox"/> Parts management | <input type="checkbox"/> Wheel alignments |
| <input type="checkbox"/> Towing | <input type="checkbox"/> Warranty work |
| <input type="checkbox"/> Body and paint | <input type="checkbox"/> Detailing |
| <input type="checkbox"/> Spring repair | <input type="checkbox"/> Washes |
| <input type="checkbox"/> Computer-related repair issues | <input type="checkbox"/> Component rebuilds |
| <input type="checkbox"/> Repairs requiring special equipment | <input type="checkbox"/> Glass |
| <input type="checkbox"/> Transmission work | <input type="checkbox"/> Upfitting |
| <input type="checkbox"/> PM/repairs for alt-fueled vehicles | <input type="checkbox"/> <u>We do not oversee maintenance/do not have repair shops</u> |
| <input type="checkbox"/> Major engine repairs | |
| <input type="checkbox"/> Other (please specify) | |

33. Have your outsourced services changed in the past year?

- No, it has stayed the same
- We began outsourcing more services (explain which services in the comments box below)
- We began in-house work on services we normally outsource (explain which services in the comments box below). Do not include work you do for other agencies.

Please explain

34. What fleet services do you insource from other entities? (Check all that apply) *This is work you do for other agencies.

- Preventive maintenance
- Repair
- Fuel
- Remarketing
- We do not perform services for other entities
- Other (please specify)

35. Have your insured services changed in the past year? Skip if not applicable.

- No, it has stayed the same
- We began outsourcing more services (explain which services in the comments box below)
- We insure less work now than last year (explain in the comments box below)

Please explain

36. How do you remarket your vehicles? (Column should add to 100)

Percentage of use

Brick & mortar auction (privately or outsourced)	<input type="text"/>
Online auction	<input type="text"/>
Trade-in	<input type="text"/>
Other (Please specify below)	<input type="text"/>

Specify your "Other" remarketing method

37. Have your remarketing methods changed in the past year? Please explain.

- More online
- More brick and mortar
- No change
- Other (Please explain)

38. What are your top 3 concerns for the following year?

- Advanced technology
- Aged fleet/replacement budgeting
- Data management
- Greening initiatives
- Increasing responsibilities of fleet manager role
- Recruitment
- Staff retirements
- Staying competitive with the private sector
- Training needs
- Other (please specify)

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3. Salary & Comments

This section about salaries and retirement plans is for public sector fleet managers only. **If you are not a public sector fleet manager/administrator/supervisor/director, etc., please skip to Question 49 on this page.**

39. What is your salary?

40. Do you have an active fleet management certification? (Skip if none)

- CAFS
- CAFM
- CEM
- CFPF
- Other (please specify)

41. What was your average salary change in 2021 from 2020?

- Increase 7% or more
- Increase 4-6%
- Increase 0-3%
- No change
- Decrease 0-3%
- Decrease 4-6%
- Decrease 7% or more
- Not applicable

Comments (optional)

42. What generation do you identify with?

- iGen / Generation Z (1995-2012)
- Millennial / Generation Y / Gen Next (born 1981-1994)
- Generation X (born 1965-1980)
- Baby Boomer (Born 1946-1964)
- Silent Generation (Born 1928-1945)

43. How many years will you continue working full-time in public fleet before you plan to retire?

44. Do you plan to be at your present agency until you retire (or leave the industry)?

- Yes, I plan to stay at my current agency
- No, I may consider moving elsewhere
- Unsure

Comments (optional)

45. Do you have a succession plan in place at your operation?

- Yes
- No
- We are working on it

46. What does your succession plan consist of? (Check as many as apply)

- Actively train someone currently on staff to take over
- Plan to stay for a period of time after replacement starts to train him/her
- Provide a detailed written list of job responsibilities, contacts, advice, etc.
- Plan to work as a contract employee for the agency after retirement.
- None
- Other (please specify)

47. Do you believe your successor is already employed at your fleet organization?

- Yes
- No
- Unsure

48. To the best of your knowledge, what percent of your fleet staff are eligible for/plan to retire in the next 5 years?



49. Can we contact you for additional information about your responses?

- Yes
- No

50. Do you have any suggestions or comments on ways we can improve this survey?

51. (OPTIONAL) We are collecting "Bright Ideas" for an upcoming issue, focusing on small or simple changes, ideas, or programs that have improved efficiency, saved money, or improved the operation. If you've implemented a successful change or program, or have an effective method of doing something you'd like to share with others, write a sentence below about it, and we may reach out to you for more information.

Thank you for your valuable input and time! Your responses are essential in helping us provide a snapshot of the industry.

Please click "Done" to submit your responses and close the questionnaire.