



# Light Duty Vehicle Trends For Utility Fleets

# Introduction

- Utilimarc database is comprised of State, County, City, Utility and Private fleet data
- In 2012 the Utilimarc database will track over 300,000 vehicles
- For this presentation we selected a subgroup of 41 Utilities and trended their 2009, 2010 and 2011 data
- The selected 41 Utilities represent approximately 90,000 Utility specific vehicles

## Average Percent of a Utility Fleet

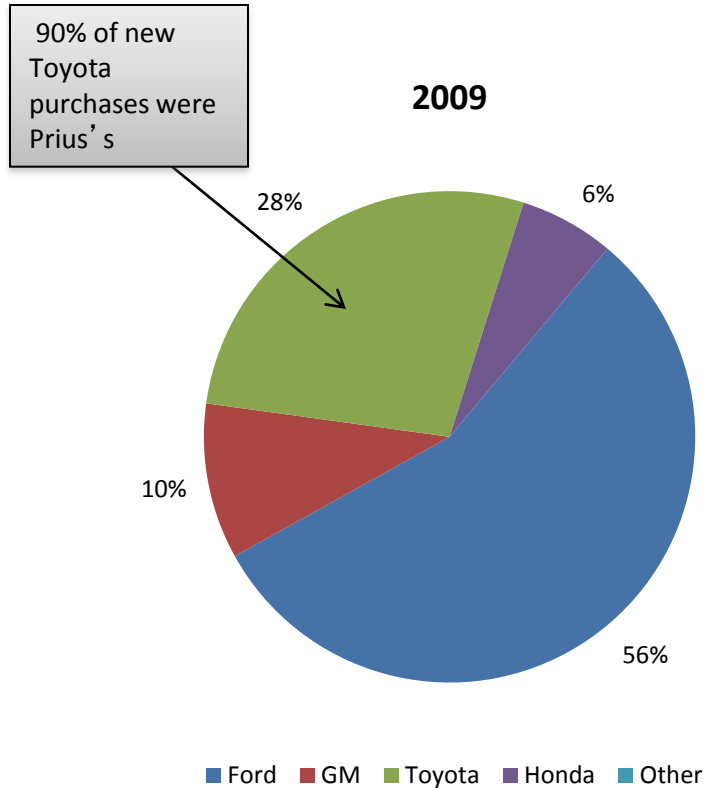
	<b>2009</b>	<b>2010</b>	<b>2011</b>
<b><i>Cars</i></b>	4.0%	4.0%	4.0%
<b><i>Pickups</i></b>	22.7%	22.7%	22.3%
<b><i>SUVs</i></b>	3.9%	4.1%	4.3%
<b><i>LD Service</i></b>	8.9%	8.9%	9.3%
<b><i>LD Bucket</i></b>	3.5%	3.5%	3.8%

## Hybrid Percentage Change

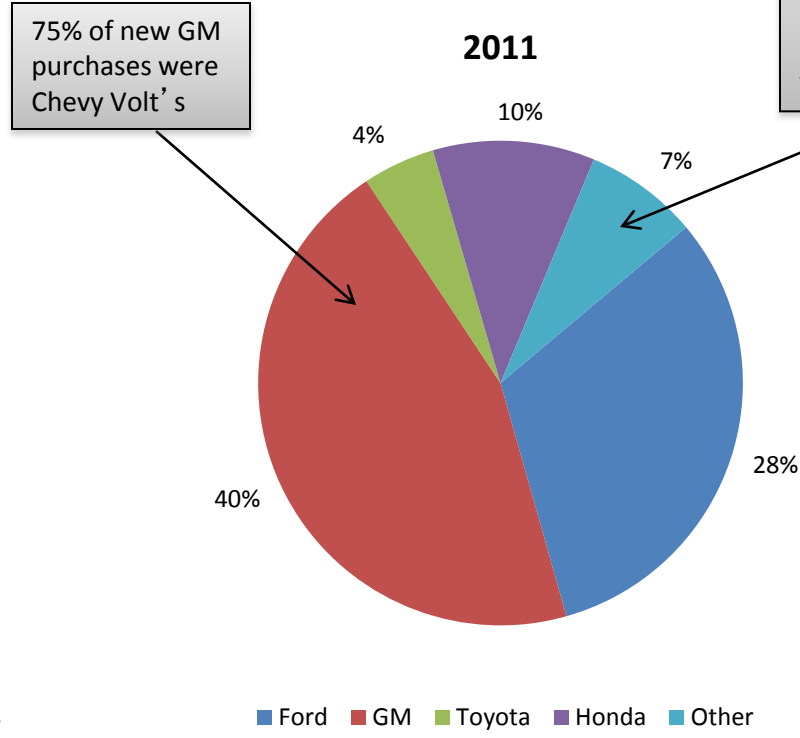
	<b>2009</b>	<b>2010</b>	<b>2011</b>
<b><i>Cars</i></b>	8.5%	10.1%	12.1%
<b><i>SUVs</i></b>	14.9%	26.1%	24.0%

- Compact car (non hybrid) 24.2 MPG
- Compact car Prius hybrid 42.9 MPG
- Chevy Volt 84.2 MPG

# Cars New Purchase Market Share

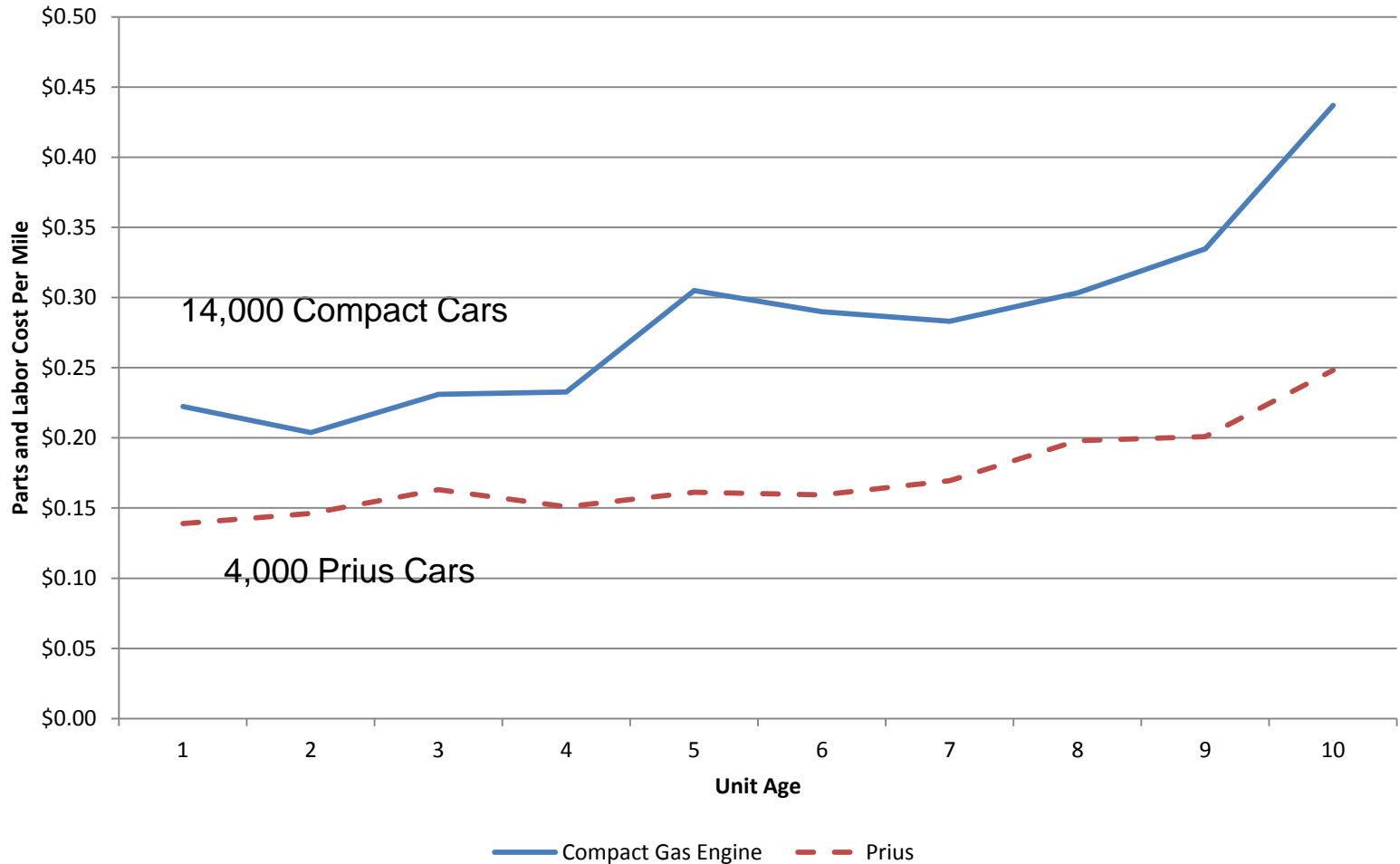


37.6% of new purchases in 2009 were alternative fueled vehicles



71.1% of new purchases in 2011 were alternative fueled vehicles

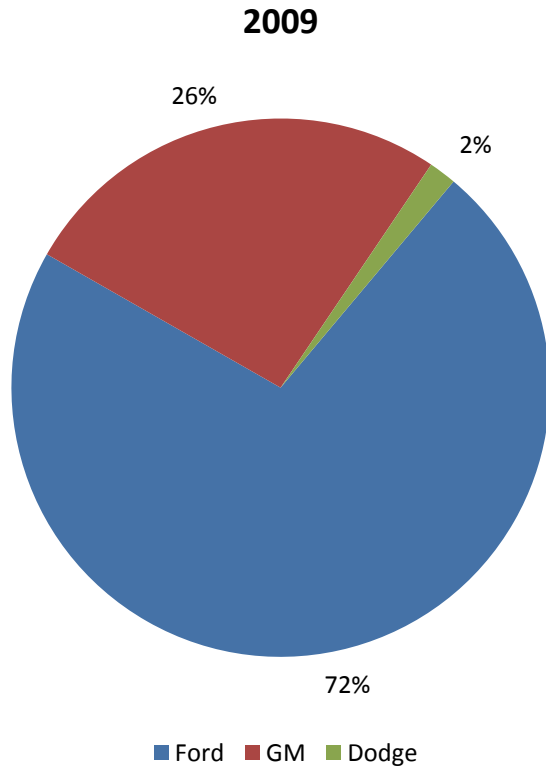
# Compact Car (gas) vs. Toyota Prius (hybrid) Parts, labor and fuel cost per mile



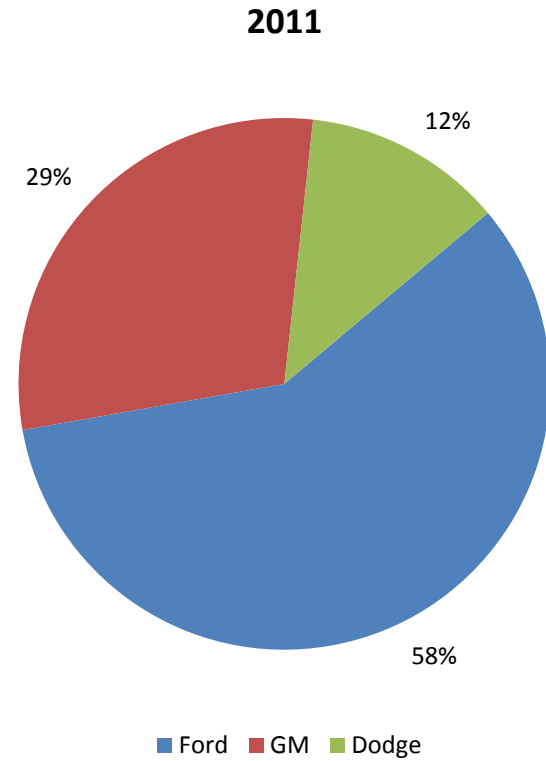
## 4 Wheel Drive Percentage Change

	<i>2009</i>	<i>2010</i>	<i>2011</i>
<i>Pickups</i>	50.9%	52.7%	53.4%
<i>LD Service</i>	36.5%	38.7%	38.2%
<i>LD Bucket</i>	48.9%	57.5%	59.9%

# Pickups New Purchase Market Share



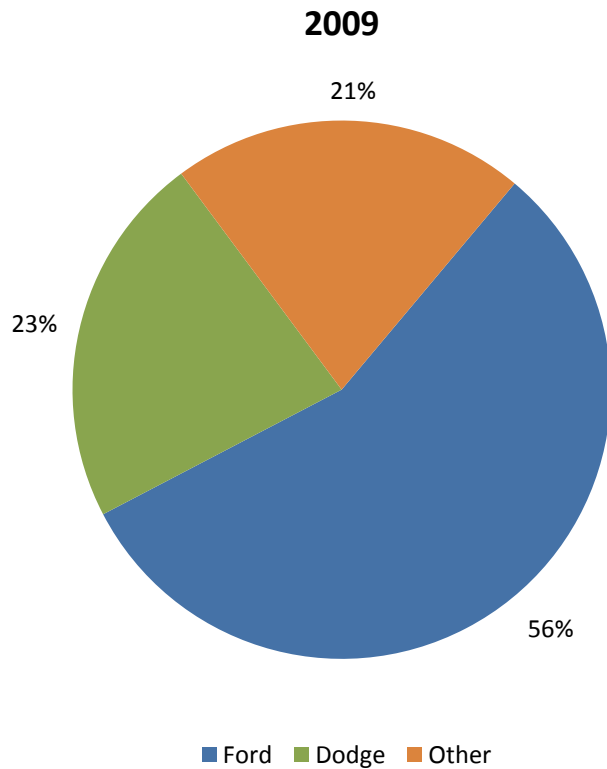
55.9% of new purchases in 2009 were 4 wheel drive vehicles



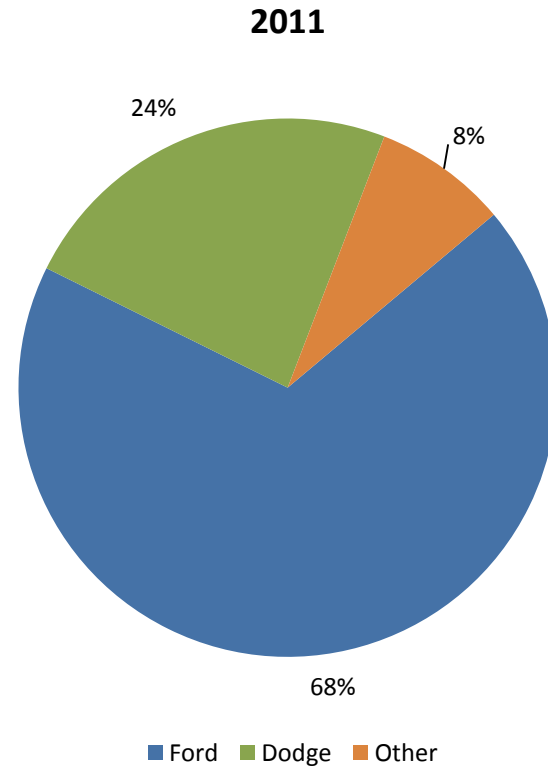
84.3% of new purchases in 2011 were 4 wheel drive vehicles



# LD Bucket New Purchase Market Share

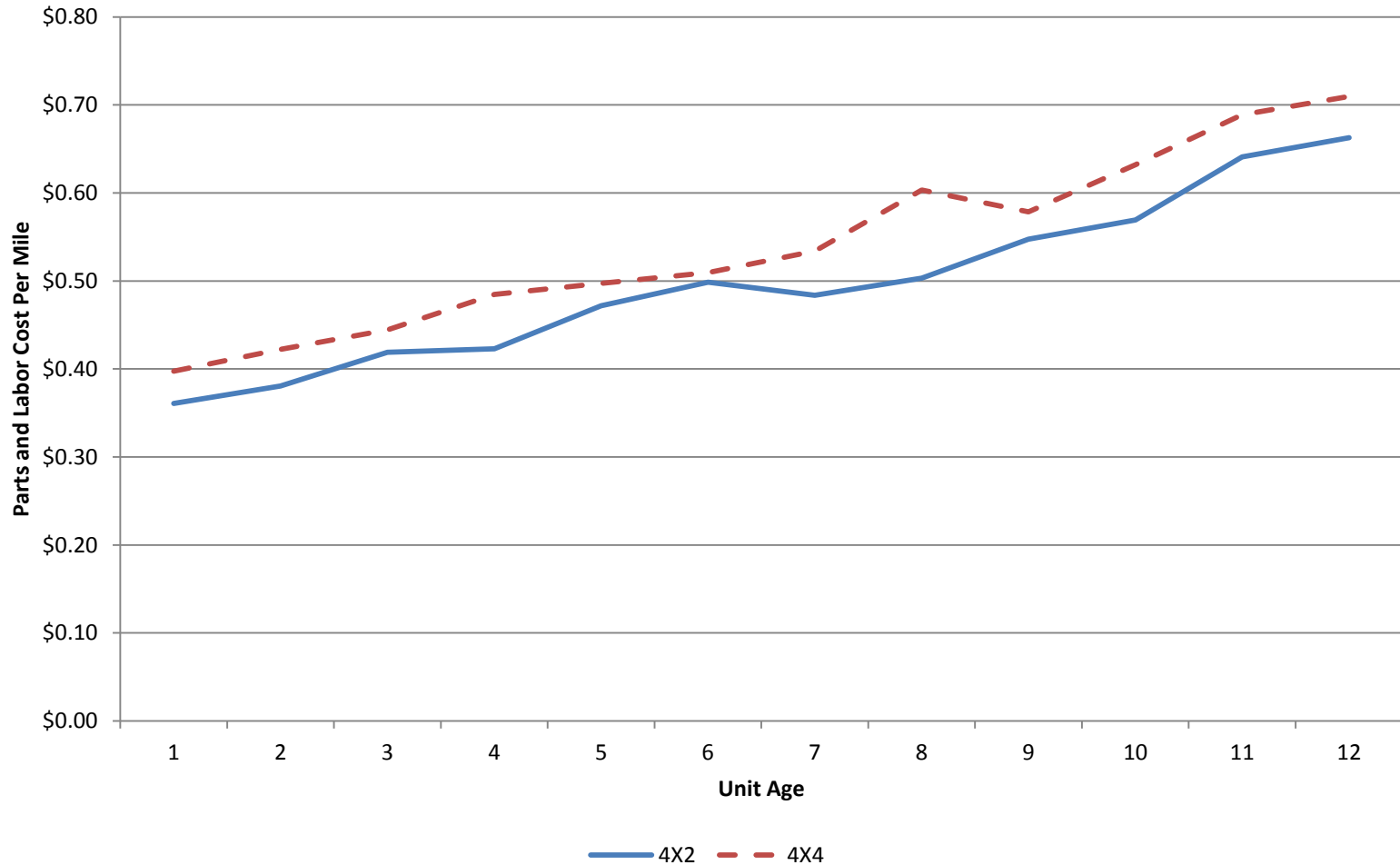


57.8% of new purchases in 2009 were 4 wheel drive vehicles

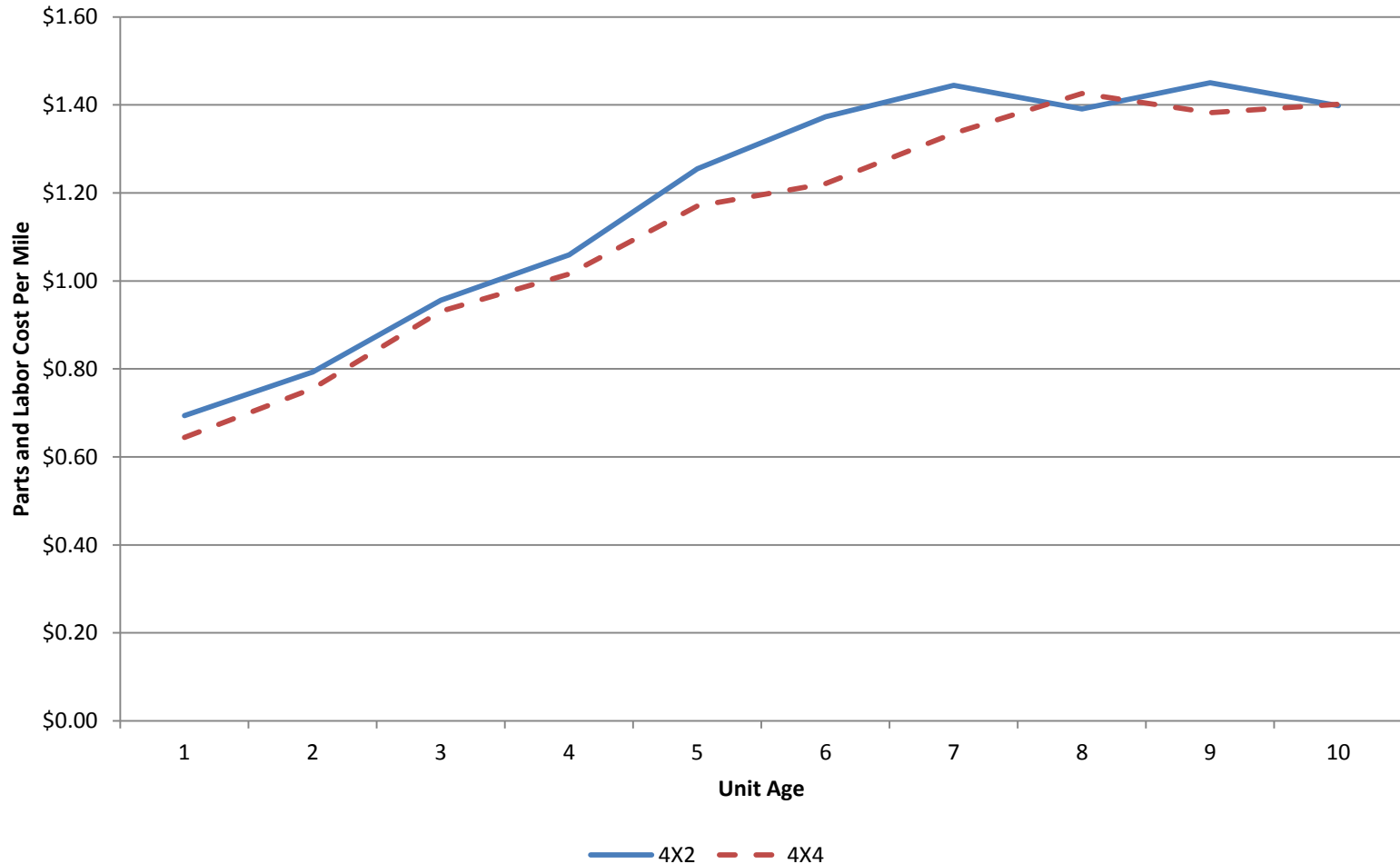


68.8% of new purchases in 2011 were 4 wheel drive vehicles

## MD Pickup (F250, 2500) 4X4 vs. 4X2 Parts, labor and fuel cost per mile



## LD Bucket 4X4 vs. 4X2 Parts, labor and fuel cost per mile



# Average Vehicle Age Change

	<i><b>2009</b></i>	<i><b>2010</b></i>	<i><b>2011</b></i>
<i><b>Cars</b></i>	5.27	5.47	5.56
<i><b>Pickups</b></i>	4.98	5.31	5.46
<i><b>SUVs</b></i>	4.62	4.80	4.89
<i><b>LD Service</b></i>	5.53	5.89	6.13
<i><b>LD Bucket</b></i>	4.70	4.79	5.07

## Average Vehicle Mileage

	<i>2009</i>	<i>2010</i>	<i>2011</i>
<i>Cars</i>	11,004	10,481	10,174
<i>Pickups</i>	12,272	12,216	11,943
<i>SUVs</i>	12,401	12,755	12,435
<i>LD Service</i>	12,052	12,144	12,208
<i>LD Bucket</i>	16,383	16,470	17,172

# Summary

- There has been no significant change in LD vehicles as a percentage of Utility fleets
- We have seen changes within certain LD vehicle classes, increase in Hybrids as a percentage of fleet and increase in 4X4 as a percentage of fleet
- Hybrid data shows improved MPG and improved operating costs with the compact car comparison
- 4x4 data shows an impact in operating costs per mile for pickups but not for LD bucket trucks
- Average age for all LD vehicle classes has increased from 2009 to 2011