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

<table>
<thead>
<tr>
<th></th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cars</strong></td>
<td>4.0%</td>
<td>4.0%</td>
<td>4.0%</td>
</tr>
<tr>
<td><strong>Pickups</strong></td>
<td>22.7%</td>
<td>22.7%</td>
<td>22.3%</td>
</tr>
<tr>
<td><strong>SUVs</strong></td>
<td>3.9%</td>
<td>4.1%</td>
<td>4.3%</td>
</tr>
<tr>
<td><strong>LD Service</strong></td>
<td>8.9%</td>
<td>8.9%</td>
<td>9.3%</td>
</tr>
<tr>
<td><strong>LD Bucket</strong></td>
<td>3.5%</td>
<td>3.5%</td>
<td>3.8%</td>
</tr>
</tbody>
</table>
## Hybrid Percentage Change

<table>
<thead>
<tr>
<th></th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cars</td>
<td>8.5%</td>
<td>10.1%</td>
<td>12.1%</td>
</tr>
<tr>
<td>SUVs</td>
<td>14.9%</td>
<td>26.1%</td>
<td>24.0%</td>
</tr>
</tbody>
</table>

- Compact car (non hybrid) 24.2 MPG
- Compact car Prius hybrid 42.9 MPG
- Chevy Volt 84.2 MPG
Cars New Purchase Market Share

2009

- 28% Ford
- 6% GM
- 10% Toyota
- 28% Honda
- 10% Other

90% of new Toyota purchases were Prius’

2011

- 40% Ford
- 10% GM
- 7% Toyota
- 7% Honda
- 28% Other

75% of new GM purchases were Chevy Volt’s

98% of ‘Other’ purchases were alternative fueled vehicles such as the Nissan Leaf and the THINKCITY

37.6% of new purchases in 2009 were alternative fueled vehicles

71.1% of new purchases in 2011 were alternative fueled vehicles

90% of new Toyota purchases were Prius’

75% of new GM purchases were Chevy Volt’s

98% of ‘Other’ purchases were alternative fueled vehicles such as the Nissan Leaf and the THINKCITY

37.6% of new purchases in 2009 were alternative fueled vehicles

71.1% of new purchases in 2011 were alternative fueled vehicles

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

Parts and Labor Cost Per Mile

Unit Age

14,000 Compact Cars

4,000 Prius Cars

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# 4 Wheel Drive Percentage Change

<table>
<thead>
<tr>
<th></th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Pickups</strong></td>
<td>50.9%</td>
<td>52.7%</td>
<td>53.4%</td>
</tr>
<tr>
<td><strong>LD Service</strong></td>
<td>36.5%</td>
<td>38.7%</td>
<td>38.2%</td>
</tr>
<tr>
<td><strong>LD Bucket</strong></td>
<td>48.9%</td>
<td>57.5%</td>
<td>59.9%</td>
</tr>
</tbody>
</table>
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
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

Parts and Labor Cost Per Mile

Unit Age

$0.00 $0.10 $0.20 $0.30 $0.40 $0.50 $0.60 $0.70 $0.80

1 2 3 4 5 6 7 8 9 10 11 12

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

Parts and Labor Cost Per Mile

Unit Age

Parts and Labor Cost Per Mile

Unit Age

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## Average Vehicle Age Change

<table>
<thead>
<tr>
<th></th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cars</strong></td>
<td>5.27</td>
<td>5.47</td>
<td>5.56</td>
</tr>
<tr>
<td><strong>Pickups</strong></td>
<td>4.98</td>
<td>5.31</td>
<td>5.46</td>
</tr>
<tr>
<td><strong>SUVs</strong></td>
<td>4.62</td>
<td>4.80</td>
<td>4.89</td>
</tr>
<tr>
<td><strong>LD Service</strong></td>
<td>5.53</td>
<td>5.89</td>
<td>6.13</td>
</tr>
<tr>
<td><strong>LD Bucket</strong></td>
<td>4.70</td>
<td>4.79</td>
<td>5.07</td>
</tr>
</tbody>
</table>
## Average Vehicle Mileage

<table>
<thead>
<tr>
<th></th>
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<th>2010</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cars</strong></td>
<td>11,004</td>
<td>10,481</td>
<td>10,174</td>
</tr>
<tr>
<td><strong>Pickups</strong></td>
<td>12,272</td>
<td>12,216</td>
<td>11,943</td>
</tr>
<tr>
<td><strong>SUVs</strong></td>
<td>12,401</td>
<td>12,755</td>
<td>12,435</td>
</tr>
<tr>
<td><strong>LD Service</strong></td>
<td>12,052</td>
<td>12,144</td>
<td>12,208</td>
</tr>
<tr>
<td><strong>LD Bucket</strong></td>
<td>16,383</td>
<td>16,470</td>
<td>17,172</td>
</tr>
</tbody>
</table>
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