



**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

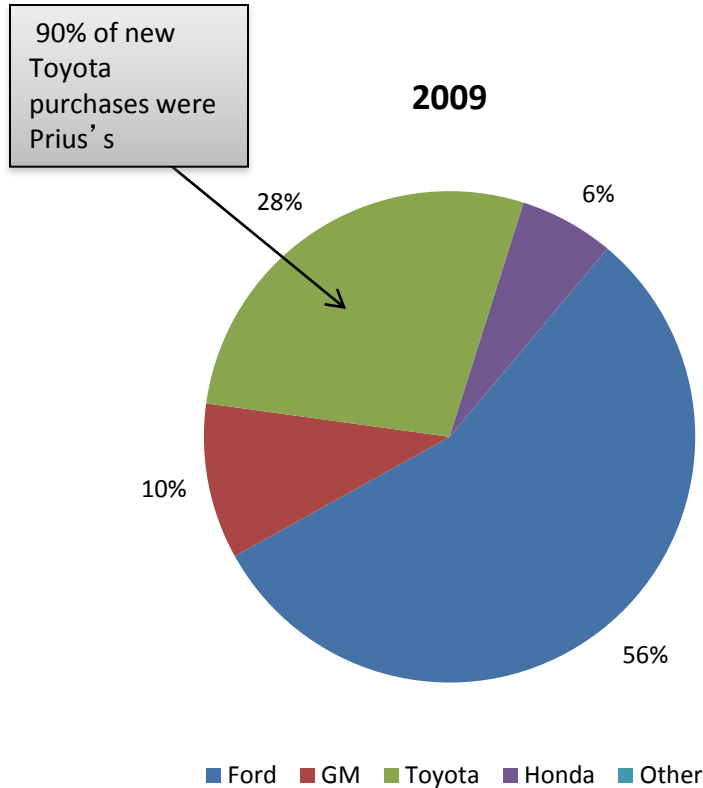
	2009	2010	2011
<i>Cars</i>	4.0%	4.0%	4.0%
<i>Pickups</i>	22.7%	22.7%	22.3%
<i>SUVs</i>	3.9%	4.1%	4.3%
<i>LD Service</i>	8.9%	8.9%	9.3%
<i>LD Bucket</i>	3.5%	3.5%	3.8%

Hybrid Percentage Change

	2009	2010	2011
<i>Cars</i>	8.5%	10.1%	12.1%
<i>SUVs</i>	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

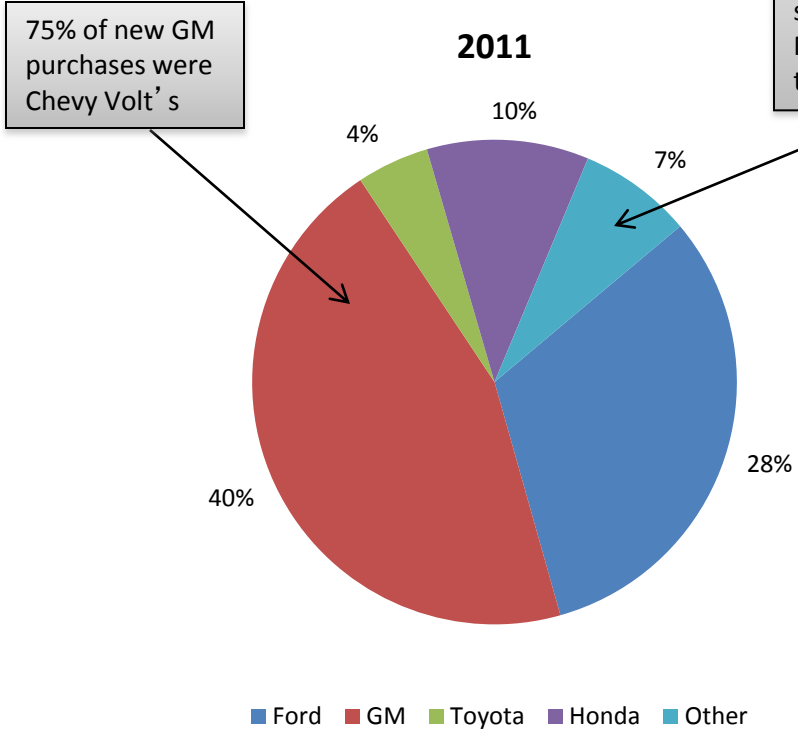
Cars New Purchase Market Share



90% of new Toyota purchases were Prius's

75% of new GM purchases were Chevy Volt's

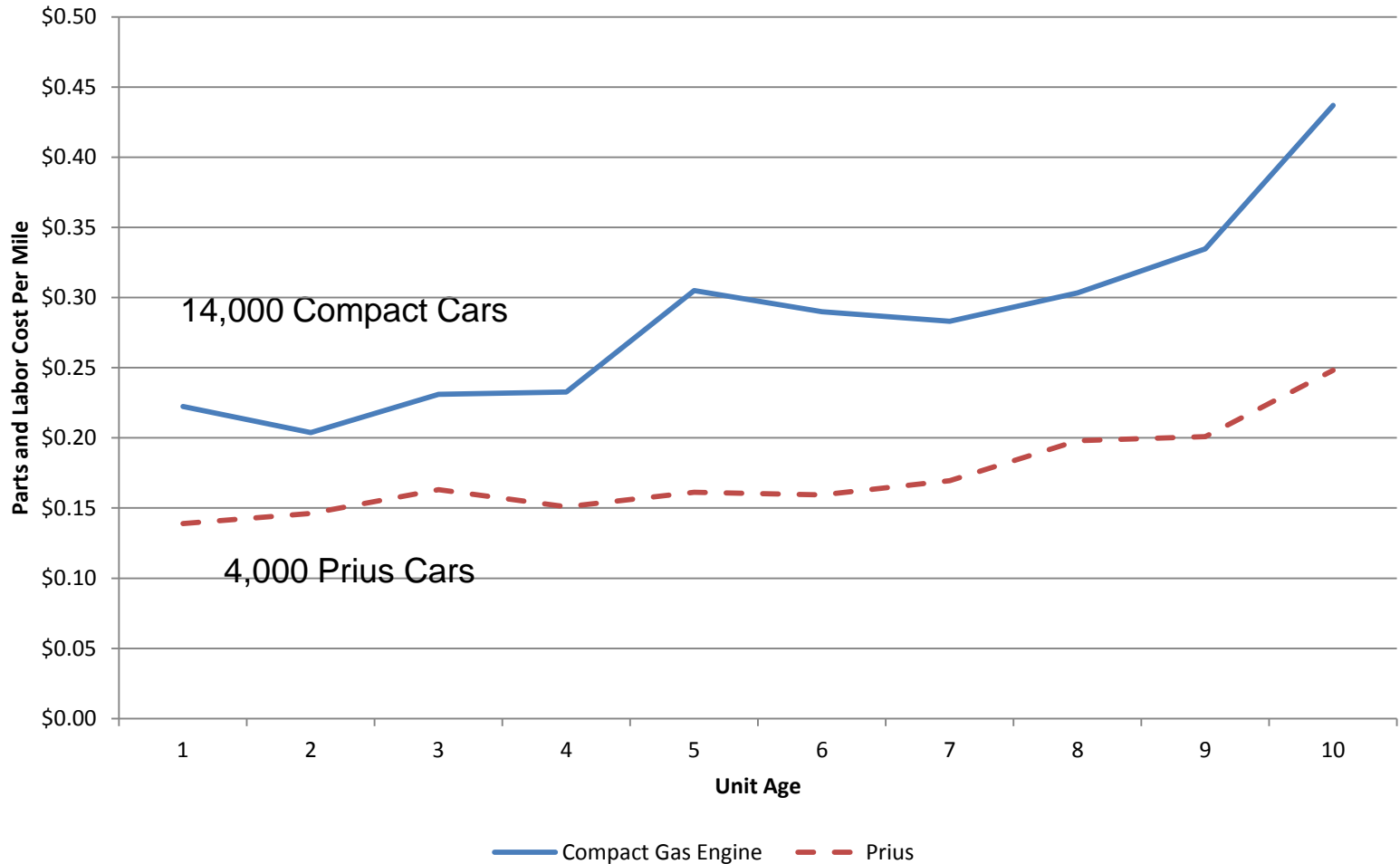
37.6% of new purchases in 2009 were alternative fueled vehicles



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

71.1% of new purchases in 2011 were alternative fueled vehicles

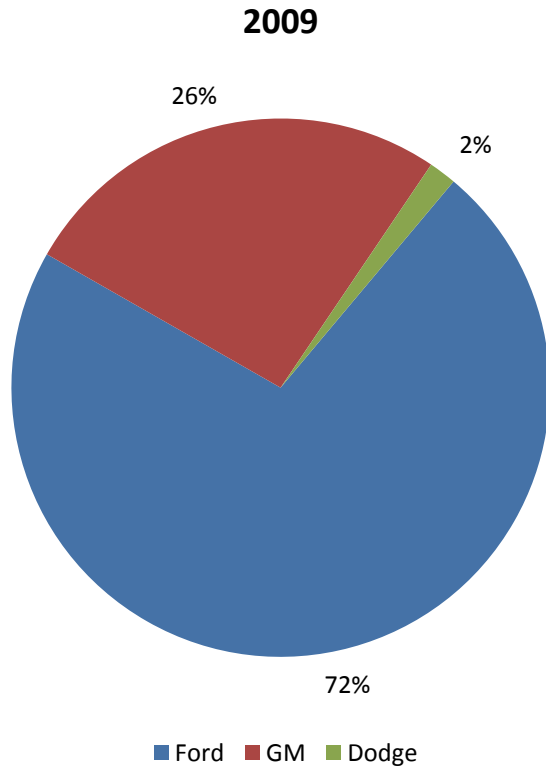
Compact Car (gas) vs. Toyota Prius (hybrid) Parts, labor and fuel cost per mile



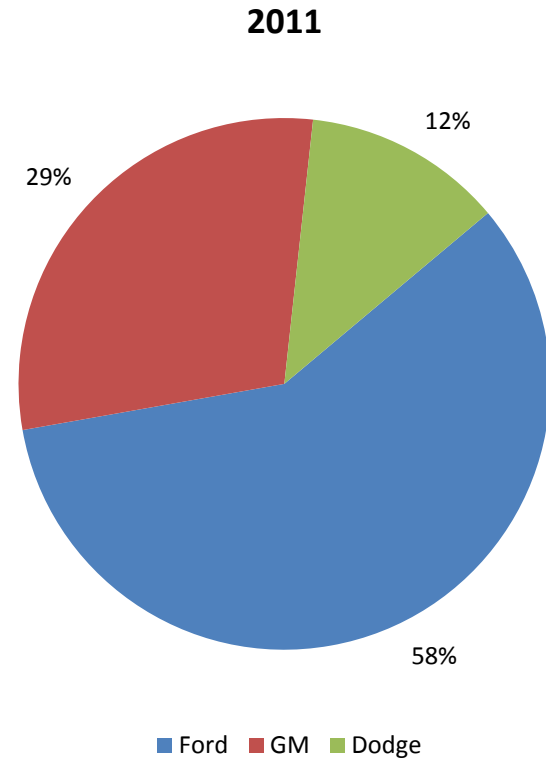
4 Wheel Drive Percentage Change

	2009	2010	2011
<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

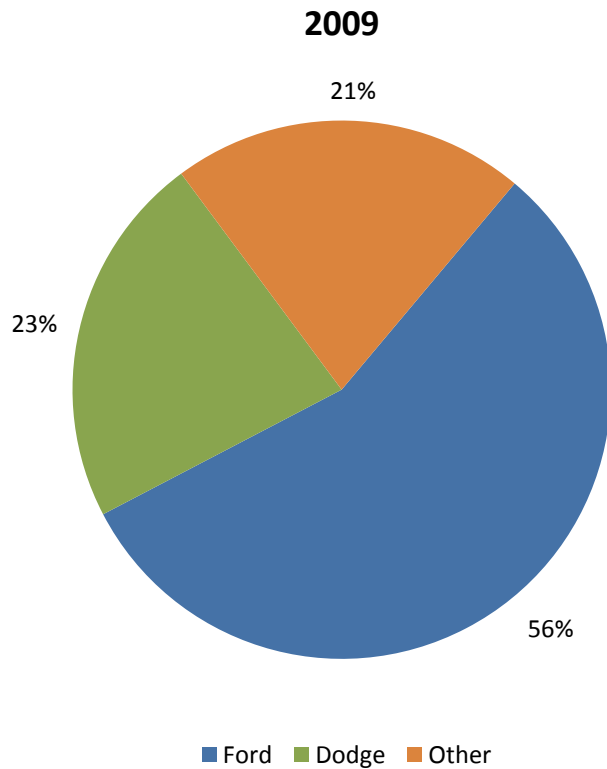


55.9% of new purchases in 2009 were 4 wheel drive vehicles

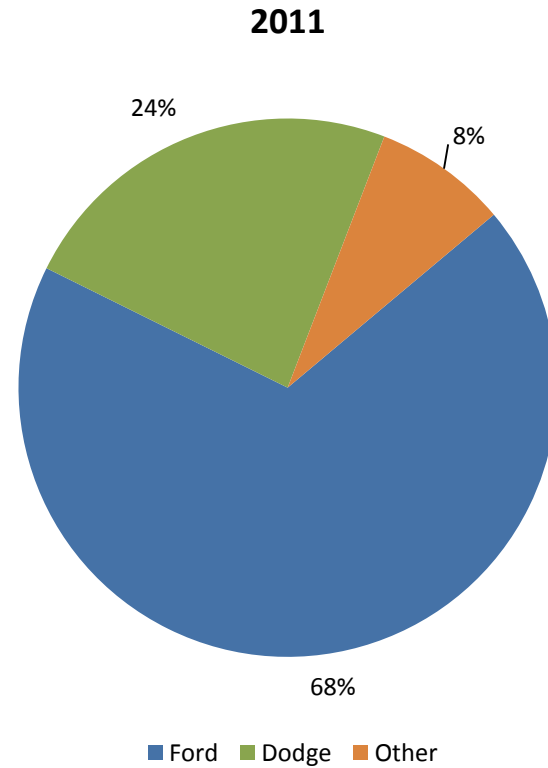


84.3% of new purchases in 2011 were 4 wheel drive vehicles

LD Bucket New Purchase Market Share

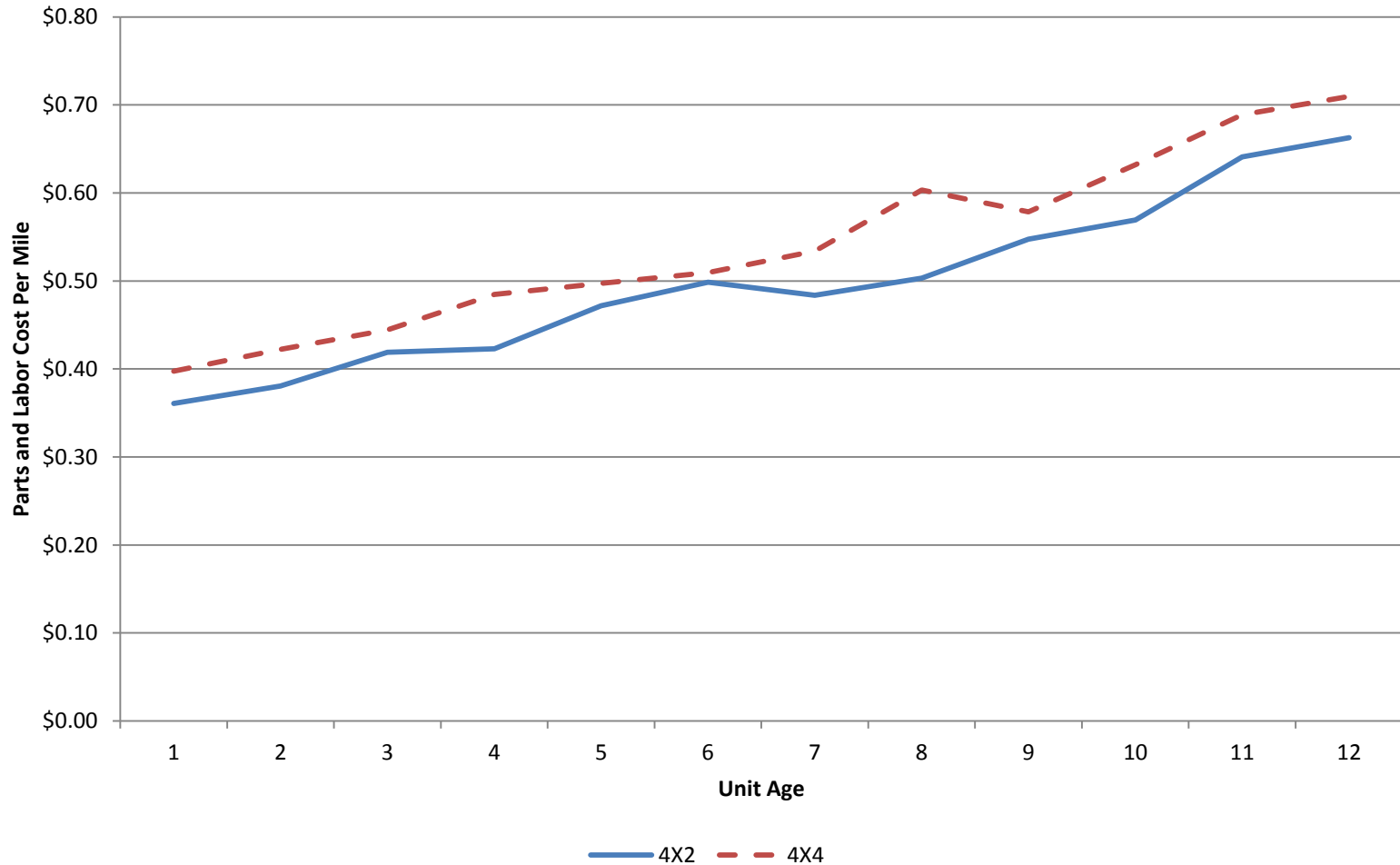


57.8% of new purchases in 2009 were 4 wheel drive vehicles

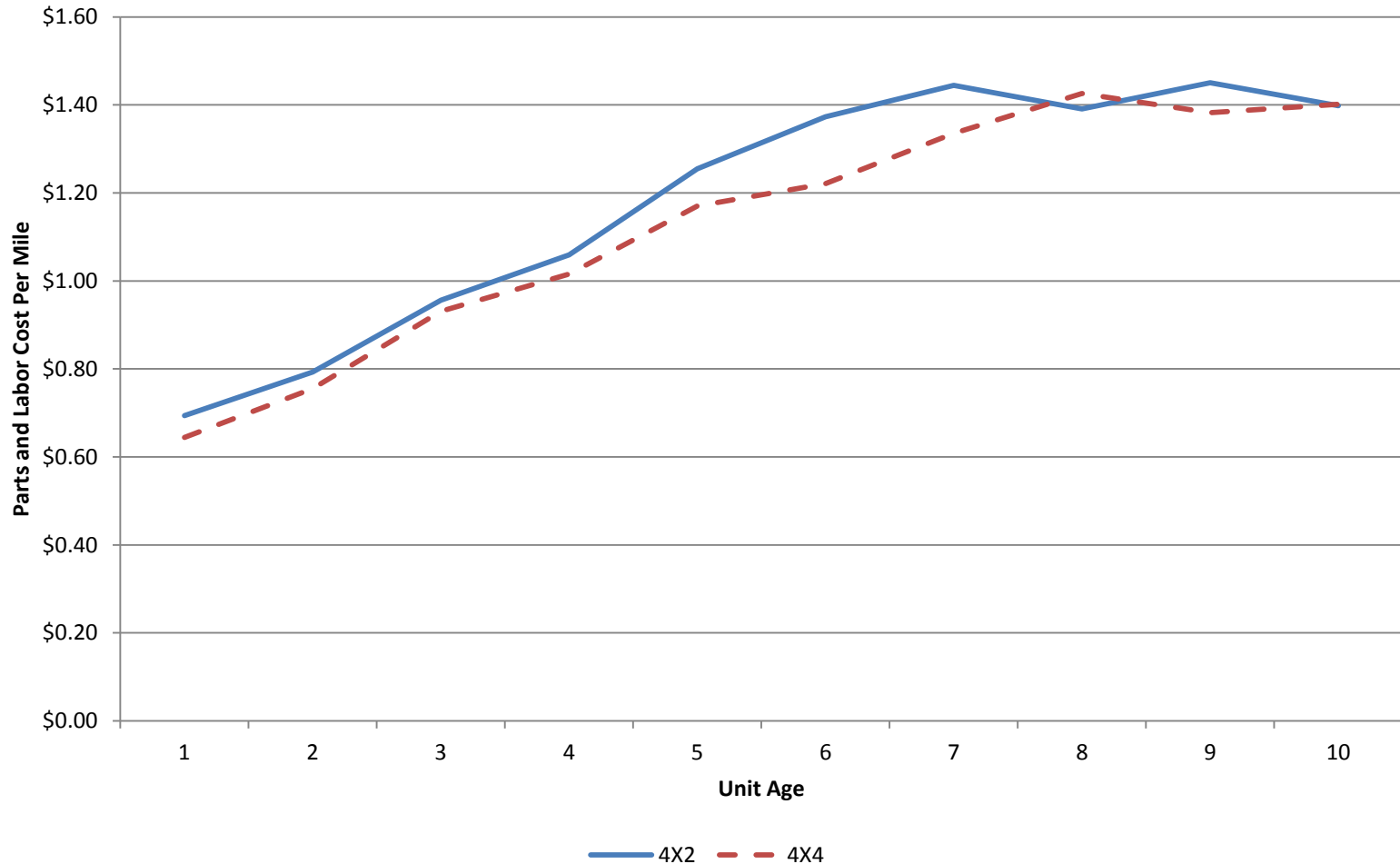


68.8% of new purchases in 2011 were 4 wheel drive vehicles

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

Average Vehicle Mileage

	2009	2010	2011
<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