
STUDY CONSPECTUS

Vehicle Procurement including Advanced Vehicle and Fuel Technologies
Fuel and Payment Methods
Leasing, Maintenance & TBA, and Fleet Management
ABSTRACT

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THE HAVILL STUDY

The Havill study is the primary source of planning data for companies supplying automobiles, trucks, fuel, leasing, maintenance, TBA, card payment solutions, and advanced technologies to the fleet industry. This data is vital to marketers due to the fragmented nature of the industry.

To isolate the market forces driving purchase decisions, the Commercial Fleet Market Forecast separates the market into 10 unique segments: agriculture, construction, service, retail, manufacturing, wholesale, long haul, short haul, utility, and government; and three fleet size ranges: 4 to 9, 10 to 49, and 50 or more vehicles.

Over forty suppliers to the industry participated in the research design. Interviews were conducted with a stratified sample of 1,100 fleet operators across the U.S. to determine their current satisfaction level and find out what they are looking for in the next generation of products and services.

The research quantifies their purchases of fleet related products and services, and forecasts the adoption rates of new technologies. The market position of competing products is broken out by business segment and fleet size.

Survey results are projected to the U.S. fleet population based on Department of Commerce benchmarks, published every five years. Trends are noted across the timeline covered by the Havill study series: 1995, 2000, and 2005.
COMPLEMENTARY HAVILL SERVICES

Market research provides the intelligence needed to develop sound business strategies and effective marketing plans. The mission of Havill & Company is to extend the value of this research to sales associates and channel partners by providing real-time access to:

- A data warehouse of fleets identified by the research,
- The direct marketing and sales support tools required to convert these prospects to customers.

Research from The U.S. Commercial Fleet Market Forecast serves as the foundation for these services. For the past decade, industry leaders have relied on this multi-client study series as their primary source for fleet industry planning data. The research is a critical examination of market trends, the relative position of competing products, the adoption rates of new technologies, and the product preferences of commercial fleet operators.

The research also benchmarks vehicles by class and the consumption of fuel, preventive maintenance, parts, and tires. The benchmark data is available by State and Metropolitan Statistical Area (MSA).

Havill has compiled a research database of over 860,000 fleet operators across the country. Access to the database is provided through FleetLeads, Havill’s web-based lead management program. FleetLeads enables subscribers to query the market by geography, type of business, fleet size, and vehicle class. Leads can be printed or downloaded for distribution to the sales team.

Havill builds proprietary data warehouses for subscribers using the research database as a template. A customer file analysis identifies the characteristics of prospects that resemble good customers. Leads that match the good customer profile and that are not already present in the data warehouse are imported. Since all list sources are incomplete to some degree, lists are added in layers until the warehouse is complete.

Subscribers access their data warehouse through a customized version of FleetLeads, a full-featured lead management program providing a complete set of direct marketing and sales support tools to support sales associates and channel partners. Access rights are controlled through the use of usernames and passwords.

Havill also provides white papers on best industry practices based on fleet study findings. They position the subscriber as a leading solution provider on the topic covered, and are the cornerstone for Havill’s lead qualification services.

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ACKNOWLEDGEMENT

RESEARCH DESIGN

Each survey in this multi-client study series began by mailing issues ballots to executives in the vehicle manufacturing, leasing, maintenance, TBA, telematics, insurance, fleet card, and petroleum retailing industries. Using the 2000 study as a template, over 500 hours of executive interviews and background research went into updating the issues to be covered in this commercial fleet market study.

The value of the research lies in its ability to address the issues facing suppliers of the commercial fleet market. The table below lists industry leaders who have provided input to this study series. Many of these companies are charter subscribers and contributed to study objectives through hours of questionnaire design. Though the charter subscriber base is diverse, one common goal exists among them, to obtain planning data, not available elsewhere, as input to their strategic and market planning processes.

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RESEARCH STUDY TEAM

Havill & Company consultants routinely conduct both syndicated and proprietary studies for clients serving the transportation industry. We have performed numerous in-depth studies of the commercial fleet market. From this previous research, we have developed extensive databases of fleet operators.

These databases are used for survey research and to support our clients’ direct mail and telemarketing programs. Our proprietary Internet based lead distribution and sales support website, www.FleetLeads.com, provides marketing support to our clients’ direct sales and channel partner organizations. The team of consultants that published this multi-client research report and deliver these marketing services is listed below.

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- Alicia Good
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OVERVIEW

This multi-client study series began over a decade ago in 1993. This is the fourth major publication. The timing for the research was set to follow the publication of key industry benchmarks; in particular, the U.S. Department of Commerce, Vehicle Inventory and Use Survey (VIUS).

The research for this report was conducted during a time of unprecedented increases in the price of vehicle fuels. Consequently, fleet administrators came under extreme pressure to meet their operating budgets. The search for cost control has cut across virtually every aspect of fleet operations. An already cost conscious industry has become more so. Today, the first question being asked is: How will this product or service increase the efficiency and productivity of my fleet operations? The implications of this question are found in every chapter of the report.

To understand and characterize the trends that are occurring within the industry, this report begins by profiling the demographics of the fleet market. Market statistics include vehicle populations by vehicle type, travel patterns, owned and leased vehicles, gas and diesel fuel consumption, and on-site and off-site fuel consumption. All market demographics have been classified into ten distinct business segments. All vehicle and consumption statistics have been analyzed and projected to the four-plus commercial vehicle population. In addition, a forecast of the future four-plus fleet vehicle population is provided.

Vehicle procurement is a primary responsibility of fleet administrators. In the past, commercial vehicles were either purchased using internal funds or financed. More recently, however, fleet vehicle leasing has become prevalent throughout all business segments and fleet size ranges. This research provides a better understanding of the processes used by different segments of the fleet market to research, select, finance, and replace their vehicles.

Vehicle leasing programs have become a popular alternative that many fleets consider when procuring their vehicles. Leasing programs can benefit fleet managers by freeing up capital and reducing the ownership risk of outdated equipment. However, strong competition within the industry requires leasing companies to develop well-structured programs for fleet managers. To help vehicle leasing companies fine-tune their offerings, this research measures fleet interest in leasing programs, full-service features, contract terms, and supplemental rental vehicles.
Historically, a primary responsibility of the fleet manager has been to make certain that their vehicle fleet is properly maintained. Fleet maintenance practices have evolved over time. In the past, companies had in-house technicians or a local garage maintain their vehicles. Today, companies not only continue to use traditional methods, but also use mobile maintenance providers or outsource the maintenance to third-party on-site technicians. Competition for off-site maintenance has been intense between vehicle dealers and independent garages. Recently, competition has become even more intense with the widespread introduction of leasing company maintenance programs. This research measures maintenance vendor selection factors, types of vendors used, frequency of use, vendor satisfaction, and interest in maintenance tracking programs.

Fleet fueling is another component in the fleet service industry. Traditionally, the fleet administrator’s decision to fuel on-site or off-site has been a tradeoff among cost, convenience, and control. EPA fuel storage tank regulations established in 1988 forced fleet administrators to evaluate the cost effectiveness of upgrading their fueling facilities versus moving off-site to fuel. Historically, fleets maintained on-site facilities because they offered benefits not available through retail fueling. Today the benefits of on-site fueling are challenged by offerings that are made available at off-site fueling facilities.

While off-site commercial fueling has been an active and growing market, the on-site fueling segment has been in a state of flux. Largely unregulated prior to 1988, commercial fleets found on-site facilities a convenient alternative that ensured an adequate fuel supply and enabled them to easily track their fuel consumption and related expenditures. However, EPA regulations passed in 1988 called for the fleet manager to meet new on-site fueling facility mandates. The increased liability of underground storage tanks (USTs) and cost to upgrade to meet 1998 regulatory requirements has forced fleets to rationalize their on-site facilities. UST liability coupled with the lure of enhanced fleet services offered by retail marketers have persuaded many on-site commercial fleets to look for other options.

For those fleets that prefer to fuel on-site but are not interested in the many hassles associated with operating their own fueling facility, there is the option of mobile fueling. Mobile fueling, sometimes referred to as wet-hosing, has begun to gain market share. This relatively new service offers many of the benefits of on-site fueling without the capital cost and liability of maintaining an on-site facility. This study quantifies the on-site market by fueling method, and profiles the reasons why companies choose to fuel on-site.
Other fleet managers may choose to fuel off-site, a decision made easier with the benefits offered by oil companies’ enhanced fleet fueling programs. As marketers took notice of a growing commercial fleet market, increased consideration was given to the fleet manager’s expectations regarding facility attributes, and the need for convenient billing and reporting options. Meeting the requirements of the commercial fleet manager is key to gaining and maintaining brand loyalty and market share. Marketers want to ensure that new facility designs meet the needs of fleet managers. In response, this survey breaks out fuel consumption by on-site versus off-site fueling. In addition, it assesses the market need for facility offerings and services, as well as reviewing potential areas that may impact facility loyalty.

In the early 1990s, the most significant off-site fueling market development was the widespread introduction of payment programs designed specifically for fleets. Petroleum marketers realized the importance of fleet fueling cards in capturing market share and establishing brand loyalty.

The competition to establish brand loyalty among fleets was reflected in the increased offerings of commercial fleet cards. At one time, a credit card statement would have only included the account number, transaction date, fueling location, and transaction amount. Now, many fleet cards are used to track fuel purchases and other necessities; such as tires, maintenance, travel, and general business expenses. Today, fleet card programs feature universal acceptance, discounts, customized restrictions, and detailed reporting. Once only available through on-site fueling, convenience, cost effectiveness, and control benefits are realized through the use of fleet cards. To better understand what fleet operators are looking for from their fleet card providers, the research results breakout payment methods, card and billing features used, and interest in non-fuel purchasing and tracking.

In the past, the fleet manager’s primary function was to keep the company’s fleet vehicles fueled and maintained. Today’s fleet managers take on a multitude of additional fleet related activities. Many are responsible for procurement, fuel and maintenance programs, driver management, insurance, and logistics. For some, fleet management is only a portion of their job responsibility. As a result, outsourcing fleet activities, such as fueling, maintenance, and logistics, allows fleet administrators to focus on making the fleet a profit center. For card providers, vehicle manufacturers, leasing, and vehicle management companies, this survey reports the purchase decision processes, expense tracking methods, and attitudes towards fleet vehicle management.
STUDY OBJECTIVES

MARKET RESEARCH OVERVIEW

Successful business plans require accurate market forecasts. Due to the diversity of issues covered by the research, the decision was made to publish the 2005 U.S. Commercial Fleet Market Study as three reports covering the following topics:

Vehicle Procurement – Advanced Vehicle and Fuel Technologies
- Chapter 2 – Vehicle Procurement
- Chapter 4 – Advanced Vehicle and Fueling Technology

Fueling and Payment Methods
- Chapter 5 – On-Site versus Off-Site Fueling
- Chapter 6 – Off-Site Payment Methods
- Chapter 7 – Card Program Features

Leasing, Maintenance & TBA, and Fleet Management
- Chapter 3 – Leasing
- Chapter 8 – Maintenance and TBA
- Chapter 9 – Fleet Administration I
- Chapter 10 – Fleet Administration II

The market demographics section is common to all reports. It provides an overview of the trends occurring in the U.S. commercial fleet market, presenting statistics on businesses operating fleets, the number and type of vehicles in their fleet, where they are domiciled, their travel patterns, and annual miles driven.
VEHICLE PROCUREMENT SURVEY

*Advanced Vehicle and Fuel Technologies*

This research examines the overall attitudes and opinions of commercial fleet operators toward vehicle procurement decisions. The research identifies factors that drive vehicle acquisition decisions: performance, safety, cost, environmental and legislative. The scope includes vendors, fuels, maintenance, and financing to the extent that these factors influence the procurement decision. Detailed fleet demographic information was collected so that the survey findings could be broken out by size and type of vehicles that make up the fleet.

**VEHICLE PROCUREMENT ISSUES**

This part of the survey explores factors driving fleet vehicle procurement decisions. The research enables vehicle suppliers and leasing companies to identify fleet characteristics that define their target market. Fleet operators were asked a series of questions. Why do they prefer to purchase rather than lease their vehicles? To what extent do they want to get involved in fleet management activities versus outsourcing these activities? How do they decide which type of vehicle to purchase, chassis design, add-ons, and options? Would they rather do business with the OEM-dealer or a third-party supplier? Where does the information come from to make these decisions? What role does the Internet play?

Additional issues within the scope include:

- **Fleet vehicle replacement cycles** – This is important to understand because it determines the rate in which new technology is adopted. Fire and rescue vehicles, for example, log fewer miles and are commissioned longer than courier vehicles. The rate of adoption of hybrid technologies will be drastically different in these market segments.

- **New versus used** – When do fleets consider used versus new vehicles?

- **American versus foreign** – What impact does nameplate have on the purchase decision? Do foreign suppliers need a full line or will fleets purchase the best vehicle in the class?

- **Sensitivity to vehicle delivery times** – Order-to-delivery times fluctuate according to vehicle type and demand. What are the expectations of fleets for the various vehicles they purchase and lease?

- **Sensitivity to vehicle residual value** – What is the perception of residual value between foreign and domestic nameplates and how does it impact the purchase or lease decision?
Method and location of purchase or lease – How does vehicle acquisition break out among dealers, local leasing companies, national leasing companies, and national contracts with OEMs? What drives these decisions?

Methods of vehicle financing – When vehicles are purchased, how are they financed: internally, by the manufacturer, or through a bank loan?

Chassis designs and vehicle add-ons – Many chassis designs and vehicle add-on options are available, such as low cab forward, crew cabs, automatic transmissions, four-wheel drive, power take-offs, and fuel cells. What are the attitudes and opinions of fleet operators toward these options and what is their preference for installation: OEM, dealer, or a third-party supplier?

Preference for researching and finalizing fleet vehicle purchases – This research explores preferences for receiving vehicle purchase information from the Internet, a telephone call, or a sales rep visit.

Attracting small fleet business to vehicle dealerships – Determining the best methods for attracting small fleet business to vehicle dealerships has been a recent focus of vehicle suppliers. This research determines the importance of direct marketing, sales calls, and a web presence in driving dealer traffic.

ADVANCED VEHICLE AND FUEL TECHNOLOGY ISSUES

Advanced vehicles and fuels, particularly hybrid technologies, are a focal point of this survey. While many suppliers are aware of the overall trends taking place in this industry, a primary objective of this research is to forecast the rate at which advanced vehicle and fuel technologies will be adopted.

Two major factors influence the rate of adoption. First, fleets typically go through a process of research, testing, and trial use before routine purchases of new technologies are made. And second, when new technologies are embraced, their rate of adoption is constrained by the turnover rate of vehicles in their fleet. From prior research, we know these factors vary widely by business segment and fleet size. This research forecasts the adoption rates of advanced vehicle technologies by each of our ten business segments.

These new technologies not only impact vehicle purchases, but also the way fleets fuel and maintain their vehicles and the facilities they use. While hybrid vehicles do not require an alternative fuel type, our previous research indicates that many fleets believe that hybrid vehicles are a short-
term solution and that fuel cells will win out in the long term. Additional issues within the scope include:

**Conventional fuels trends** – Gasoline, diesel by sulfur content, and biodiesel.

**Alternative fuels trends** – Electricity, ethanol, methanol, natural gas (CNG, LNG), propane, and hydrogen fuel cells.

**Hybrid vehicle trends** – Electric and hydraulic.

**Legislative requirements, grants and tax incentives** – What legislative requirements, grants and tax incentives are driving the fleet operator’s adoption of advanced vehicle and fuel technologies?

**Purchase decision factors** – What role does vehicle performance, initial purchase price, fuel economy, emission reductions, maintenance and safety play in the fleet’s decision to adopt advanced vehicle and fuel technologies? Is the fleet operator willing to pay extra for new technology?

**Implementing new technology** – What are the attitudes and opinions of fleet operators regarding retrofitting existing vehicles with new technology versus purchasing new? What is their preferred installation method: OEM manufacturer, dealer, third-party certified installer, or in-house?
FUELING AND PAYMENT METHOD SURVEY

This survey examines the overall attitudes and opinions of commercial fleet operators toward vehicle fueling and payment decisions. The research identifies factors that drive the decision to fuel on-site versus off-site: cost, convenience and control. When the decision is made to fuel off-site, factors driving payment method and fueling location are examined. Detailed demographic information was collected so that the survey findings could be broken out by business and fleet characteristics.

ON-SITE FUELING ISSUES

Many fleet operators that fueled their vehicles on-site prior to the 1998 EPA regulatory deadline closed their facility and switched to off-site fueling. Still, many fleets continue to fuel on-site. The survey determines who fuels on-site, why, and what would make them switch to off-site.

When the decision has been made to fuel on-site, the research examines underground storage tank (UST), above ground storage tank (AST), and mobile fueling practices. Past research studies have found a strong correlation between on-site fueling and on-site maintenance. This linkage is explored, as well as the attitudes and opinions of fleets toward outsourcing fuel and maintenance to a leasing or third-party management company.

Major oil companies, petroleum marketers, bulk fuel suppliers, mobile fueling services, and fleet card providers are interested in the following major issues concerning on-site fueling practices:

Quantify UST, AST, and mobile fueling practices – What on-site fueling methods are used and what are the primary reasons for selecting those methods?

Determine how fleets pay for their fuel and their interest in hedging as a method of controlling fuel cost – Fuel prices are often volatile. How important is it for fleet administrators’ to control fuel cost and what is their interest level in hedging?

OFF-SITE FUELING ISSUES

When the decision is made to fuel off-site, the research examines the usage and preference for hypermarket, c-store, truck stop, and cardlock facilities. Brand loyalty is an important topic for this survey. Issues within the scope of this survey include:

Reason for choosing their fueling facility – Do fleets choose their fueling facility first and then select a payment method accepted at that facility, or do they choose a payment method and then find a suitable
facility where that payment method is accepted? Do they pass other fueling facilities on their way to their primary facility? Do they fuel at the same facility, or different facilities but the same brand, or different facilities and different brands? How many miles do they drive to their primary facility?

**Methods of payment accepted** – Does their primary fueling facility accept fleet cards, checks, or do they offer a paper account?

**Merchandise offerings** – What merchandise offerings are required: TBA, c-store items, cobrand fast food, restaurant style meals, ATM machines, service bays, car and truck wash?

**Facility amenities** – What facility amenities are required – dedicated fleet islands, air, water, oversize vehicle access, 24-hour access?

**Petroleum equipment** – What petroleum equipment is required – card readers, radio frequency identification (RFID), cash acceptors?

## Payment Method Issues

This part of the survey examines payment methods for fuels, maintenance, and parts. Payment method is an important issue because it impacts brand loyalty. Petroleum marketers, maintenance providers, and parts suppliers issue proprietary cards to increase share of wallet. Banks, on the other hand, prefer universal cards because of the increased revenue they generate from financial charges and late fees. In some cases, the payment method is dictated by POS equipment or card readers, particularly in the truck stop and cardlock markets. Many independent merchants attempt to protect their fleet customer base by opening house accounts.

Competition in this market frequently plays out in the form of pricing mechanisms, discounts, rebates, and promotions. This is particularly evident as fleet size decreases and fleets begin to behave more like consumers when making purchase decisions. As fleet size increases, security, control, and billing features increase in importance. This survey identifies the needs of fleet administrators and their preferences for payment methods so that marketers can effectively position their payment programs. Issues within the scope of this survey include:

**Payment methods** – What payment methods do fleets use for fuel and maintenance: credit cards, on-account, or cash? What is the reason they use their primary method? What ability does the driver have in choosing the method? What has been their fraud and misuse experience?

**Credit card issuer** – Who issues their card: bank, government, leasing company, oil company, or third-party card provider?
Credit card issued to – Who is the card issued to: corporation, fleet, or personal? Is the card assigned to the vehicle or the driver?

Purchase options and features – What can be purchased with the card: fuel, maintenance, TBA, or non-fuel purchases? What card features are available: security, customer service, product lockouts, emergency road service?

Card usage – Does the fleet use multiple card programs? What is the reason for choosing the primary card?

Pricing, discounts, and loyalty rewards – Is pricing based on cost plus or retail minus? Are discounts provided? Are loyalty reward points accumulated?

Data capture, billing and payment – What reporting options are needed/available such as tax-exempt fuel reporting? Is settlement by check or EFT/ACH an option? Would an incentive influence the settlement method?
FLEET MANAGEMENT SURVEY

Leasing, Maintenance & TBA, and Telematics

This survey examines fleet administrator needs, their overall attitudes and opinions toward leasing, maintenance and TBA, and telematics, current issues they face, and their process for researching and finalizing purchases. Detailed business and fleet demographic data was collected.

The focus of this research is market segmentation analysis. All fleets replace their tires, as an example. All fleets do not purchase retreads, however, and their tire replacement rates vary according to their line of business and travel patterns. This research identifies the demographic criteria associated with particular market behaviors.

LEASING ISSUES

We are frequently asked why more fleets don’t lease their vehicles. The more actionable question is: How can I identify fleet segments that I can target with tailored leasing programs? This research characterizes the own versus lease practices of commercial fleets, reasons for choosing financial versus full-service leasing, the demand for outsourcing fleet operations, and the fleet administrator’s attitudes and opinions toward bundled versus ‘a la carte’ programs.

This research builds on our 2000 study results, measuring trends in the fleet administrator’s preference for acquiring their vehicles directly from the manufacturer, from a dealer, from a national leasing company, or from a local leasing company. Additional issues within the scope include:

Vehicle lease practices – How many vehicles are leased by size and type of fleet? Are the terms of these lease contracts in miles or years? When a company decides to lease vehicles, why don’t they lease all vehicles in their fleet?

Lease program services – Which services are of interest – administrative (titles, licenses, permits, accident, collision, vehicle selection, or end of term disposal), certification, driver programs, fuel, maintenance (tire and glass replacement), insurance, emergency road service, reporting and billing?

Rental of supplemental fleet vehicles – What needs do fleet operators have to rent supplemental vehicles? Is there a seasonal pattern to rental needs?
MAINTENANCE & TBA ISSUES

This topic focuses on the maintenance practices of fleets and their sources of supply for parts, lubricants, and TBA. The research analyzes factors that are considered when making the decision to perform maintenance on-site versus off-site, with emphasis on cost perceptions and how cost is being evaluated. For fleets with on-site maintenance, the survey examines attitudes and opinions about managing these activities versus outsourcing on-site maintenance management to a third-party supplier or using a mobile service.

When the decision is made to go off-site, the fleet operator’s preference to have maintenance performed by an independent garage, dealer, or leasing company is researched. Additional issues within the scope include:

Maintenance and TBA purchase patterns – What are the average annual purchases of preventive maintenance, lubes, minor repair, tires (new and retread), batteries, and accessories? What is the maintenance and replacement frequency?

Preventive maintenance benefits – What are the perceived benefits of preventive maintenance in terms of higher service levels and reduced overall maintenance cost?

Preventive maintenance intervals – Are maintenance intervals based on mileage, time in months, OEM recommended schedule, or do they develop their own schedule? How do these intervals vary by vehicle type?

Maintenance and TBA purchase location – Why do fleets choose their particular location for maintenance and TBA purchases: vehicle dealer, national chain, leasing company, or third-party supplier? How satisfied are they with their supplier?

Parts inventory – Do they inventory parts on-site? If so, what products do they inventory?

FLEET ADMINISTRATION ISSUES

Vehicle procurement, fuel, maintenance, logistics, and driver administration issues are the driving force behind outsourcing. New wireless, GPS, and Internet technologies hold the promise of improving fleet management. Ultimately, each company decides how best to manage its fleet. This research identifies what administrators are looking for in their fleet management system and forecasts the adoption of these new technologies. Segmentation analysis breaks product and service needs out across business type and fleet sizes.
The duties and responsibilities of the fleet administrator are key to understanding how commercial fleets operate. This topic characterizes the fleet administrator, who he is, his responsibilities, the information sources he relies on to make vendor selection decisions, his attitudes and opinions toward bundled versus ‘a la carte’ services, and the role the Internet plays in how he manages fleet operations and expense tracking. Additional issues within the scope include:

**Fleet administrator responsibilities** – What is the title of the person responsible for fleet management? Is this a headquarters or branch position? How much time is spent on fleet activities? Who else is involved in fleet management?

**Information sources** – What sources of information does the fleet administrator rely on: trade publications, trade shows, industry associations, supplier websites?

**Outsourced services** – What fleet administration activities are outsourced: maintenance, vehicle procurement, fuel management, drivers, logistics?

**Service providers** – Who provides fleet administration services: leasing company, fleet management company, vehicle dealer, third-party garage?

**Pricing and billing preferences** – Do fleet administrators prefer consolidated or ‘a la carte’ pricing? What billing terms do they prefer?

**Insurance provider** – How is insurance handled: third-party, self-insured, or driver responsibility?

**Fuel and maintenance tracking** – How do they track fuel and vehicle maintenance: manually, using generic software, or using third-party maintenance tracking software?

**Telematics** – What are their attitudes and opinions about telematics? Which systems have they researched, shopped, and purchased: driver-todispatcher communication, vehicle tracking, trailer tracking? Would they prefer to lease or purchase telematics technologies?

**Unmet needs** – What new product or service suggestions do they have?
RESEARCH METHODOLOGY

Havill & Company has a proven track record of developing accurate industry forecasts for both syndicated and proprietary research. From our experience, the most reliable information source for predicting future technology trends and purchasing patterns comes from the end-users themselves. For this study, in-depth interviews were conducted with over 1,100 fleet administrators. Respondents were asked detailed questions about their vehicle, maintenance, leasing, and fueling plans.

In preparation for this study, Havill Consultants conducted the necessary background research to achieve the study objectives. Primary information sources include government agencies and reports, as well as fleet industry trade journals. This information was compiled into an issues ballot containing a list of objectives for the study. The issues ballot was sent to industry executives at automobile and truck manufacturers, leasing and insurance providers, auto parts suppliers, major oil companies, and fleet management companies, including software and telematics. Over 40 decision-makers returned the ballot with their feedback. The results of the balloting process yielded the objectives and issues for this study and were used in the design of the questionnaires.

Our research follows a reliable methodology. The questionnaire was pre-tested to ensure that respondents understood the questions and that the interview flowed smoothly. The respondent list was obtained from a database of over eight million fleet operators. The sample was stratified to the population geographically, by size of fleet, and according to the following business segments:

- Agriculture
- Construction
- Government
- Long Haul Carriers
- Manufacturing
- Retail
- Service
- Short Haul Carriers
- Utility
- Wholesale

Actual interviews were completed through CRT terminals using the Survey System®, a full-featured market research software program. Market survey data from each questionnaire was computer tabulated and projected to the fleet population. Statistical procedures were applied to establish the significance of the research findings.

Secondary sources used for this research included the aforementioned U.S. Department of Commerce, 2002 Vehicle Inventory and Use Survey (VIUS), December 2004; Bobit Publishing, Automotive Fleet Fact Book,

Havill & Company personally managed all aspects of the project. Each of the professionals assigned to this project has extensive fleet marketing research experience. They shared responsibility for the total project, including secondary research, questionnaire design, executive interviewing, analysis, and writing of the final report. All study findings have been fully documented in this report. Where appropriate, graphs have been used to visually support the analysis.

This report is based upon information from sources believed to be reliable. However, neither Havill & Company, Inc., nor individuals credited with authorship or support can guarantee its accuracy or completeness, or stand liable for possible errors of fact or judgment.

**REPORT SYMBOLS**

The following symbols are used in this publication:

n/a Not applicable.

- The question choice was not selected by any respondents or in the profiles, the service or option is not provided.

s Withheld because estimate did not meet publication standards.
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QUESTIONNAIRE APPENDIX A

PRIMARY QUESTIONNAIRE

THE U.S. COMMERCIAL FLEET MARKET FORECAST
ISSUES AND SURVEY QUESTIONS

I would like to speak with the person most responsible for the acquisition, administration, and maintenance of your company operated vehicles. Hello, my name is _________ from Havill & Company. We are an independent consulting firm located in Toledo, Ohio and are conducting a study of the commercial fleet market. We are asking a few questions regarding your company-operated vehicles. We are not selling anything and as a way of thanking you, we would like to send you a report on best fleet practices based on this study. Could I take a moment to ask you a few questions?

If they ask who the study is for, tell them: The study is sponsored by a group of leading vehicle manufacturers, leasing companies, and major oil companies who asked us to find out what fleet operators like you are looking for in the next generation of products.

1. Excluding trailers, how many vehicles do you operate (including company sedans, pickups, vans, and SUVs)? **If less than 4 vehicles, thank the respondent and terminate.**

   ______ Number of vehicles

2. What is the nature of your business? **Confirm segment:** So, I should designate you as (read appropriate business segment)? **Select one.**

   [ ] Agriculture
   [ ] Construction
   [ ] Manufacturing
   [ ] Wholesale
   [ ] Retail
   [ ] Short haul for hire carrier
   [ ] Long haul for hire carrier
   [ ] Utility
   [ ] Service
   [ ] Government
3. For classification purposes, how many employees are at your location? Select one.

- [ ] <5
- [ ] 5 to 10
- [ ] 11 to 20
- [ ] 21 to 50
- [ ] 51 to 100
- [ ] 101 to 200
- [ ] 201 to 500
- [ ] >500

4. What are your annual sales? Select one.

- [ ] <$1 MM
- [ ] $1 MM to <$10 MM
- [ ] $10 MM to <$50 MM
- [ ] $50 MM to <$100 MM
- [ ] $100 MM to <$250 MM
- [ ] $250 MM to <$500 MM
- [ ] $500 MM to <$1000 MM
- [ ] >$1 Billion

5. Do the majority of your fleet vehicles return to a home base (the same location) each night?

- [ ] Yes
- [ ] No

6. Does your fleet travel locally (within a state or adjoining state), regionally (within a multiple state area, but not nationally), or nationally (interstate)? If not local skip to Q8. Select one.

- [ ] Locally
- [ ] Regionally
- [ ] Nationally

7. If locally, ask: Is travel primarily in rural, suburban, or urban areas?

- [ ] Rural
- [ ] Suburban
- [ ] Urban

8. How many of your fleet vehicles are sedans, light duty trucks, medium duty trucks, tractor semis (excluding trailers), other heavy duty trucks excluding tractor semis, buses, other?

**KEY TO CLASSIFYING LD, MD, AND HD SINGLE BODY TRUCKS**

- LD = Classes 1 and 2 (10,000 lbs. GVW or below)
- MD = Classes 3, 4, and 5 (10,001 to 19,500 lbs. GVW)
- HD = Classes 6, and 7 (19,501 lbs. GVW and more)

9. How many vehicles are owned versus leased for (read vehicle type/next)?

10. How many vehicles are gas versus diesel for (read vehicle type/next)?

11. What is your annual average miles driven for (read vehicle type/next)?

12. Do you operate DOT registered vehicles?

- [ ] Yes
- [ ] No, Skip to Q14

If yes, what is your DOT number?

______________________ DOT Number
13. What is your DOT reportable accidents per million miles for your (medium/heavy/tractors/buses)?

14. What is your average direct cost of accidents per million miles for your (medium/heavy/tractors/buses)?

<table>
<thead>
<tr>
<th>Vehicle Type</th>
<th>Total Vehicles</th>
<th>Owned</th>
<th>Leased</th>
<th>Gas</th>
<th>Diesel</th>
<th>Annual Mileage</th>
<th>Reported Accidents</th>
<th>Avg Direct Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sedans</td>
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<td>MD</td>
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<td>HD</td>
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<tr>
<td>Tractor-Semis</td>
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<td>Buses</td>
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<tr>
<td>Other</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Total Vehicles</td>
<td>Vehicles</td>
<td>Vehicles</td>
<td>Vehicles</td>
<td>Vehicles</td>
<td>Vehicles</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

15. **If they have HD trucks, ask:** How many of your HD vehicles require operators to hold a CDL? *(Note: How many HD vehicles have a GVW more than 26,000 lbs. and are considered class 7 or class 8 vehicles?)*

______ Number of HD vehicles require CDL

16. **If they have diesel trucks, ask:** Would you be willing to pay a reasonable premium for a diesel fuel product that lowered emissions and kept engines running cleaner?

[ ] Yes
[ ] No

17. By 2008, will your overall fleet size increase, decrease, or remain the same?

[ ] Increase
[ ] Decrease
[ ] Remain the same, **skip to Q21**

18. **If increasing, ask:** Why will your fleet size increase?

[ ] Business growth
[ ] Other ________________________________ **Probe**

19. **If decreasing, ask:** Why will your fleet size decrease?

[ ] Business decline
[ ] Increase cost of operations
[ ] Decision to outsource
[ ] Other ________________________________ **Probe**

20. How many vehicles do you expect to have in operation by 2008?

______ Total vehicles in operation in 2008

[ ] Don’t know
21. By 2008, will your mix of owned and leased vehicles change?

[  ] Yes
[  ] No, skip to Q22

**If change, ask:** What percent of your vehicles in 2008 will be owned versus leased?

_____ % Owned
_____ % Leased

**VEHICLE PROCUREMENT**

Next, I would like to ask you questions about procurement of your vehicles.

22. **If have LD/MD:** What percent of your LD or MD trucks are currently the low cab forward design?

____ % low cab forward design

23. Do you expect that percent to change by 2008?

[  ] Yes
[  ] No

**If yes:** What percent of your 2008 LD/MD trucks will be the low cab forward design?

____ % low cab forward design

24. **If have MD/HD/Tractors:** Excluding pickup trucks, what percent of your MD/HD/Tractor-Semis currently use automatic transmissions?

____ % automatic transmission

25. Do you expect that percent to change in the next four years?

[  ] Yes
[  ] No, skip to Q26

**If yes:** Excluding pickup trucks, what percent of your other MD/HD/Tractor-Semis will use automatic transmissions in 2008?

____ % automatic transmission in 2008, if 0%, skip to Q28

26. MD/HD/Tractor-Semis with Automatic Mechanical Transmissions get better gas mileage than vehicles with torque converters. Using a 10-point scale where 10 is most important, how important is it that these new trucks have Automatic Mechanical Transmissions.

____ Importance of Automatic Mechanical Transmission

27. Currently, what percent of your MD/HD/Tractor-Semis with automatic transmissions have Automatic Mechanical Transmissions?

____ % automatic transmission
LEASING METHODS
If leasing continue, otherwise skip to Q33

28. Is your typical lease contract based on years or miles?
   [ ] Years
   [ ] Miles

   If based on miles: How many miles is your typical lease contract for (read vehicle type/next)?
   If based on years: How many years is your typical lease contract for (read vehicle type/next)?

<table>
<thead>
<tr>
<th>Vehicle Type</th>
<th>Miles</th>
<th>Years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sedans</td>
<td></td>
<td></td>
</tr>
<tr>
<td>LD Trucks</td>
<td></td>
<td></td>
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<tr>
<td>MD Trucks</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HD Trucks</td>
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<td></td>
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<tr>
<td>Tractor-Semis</td>
<td></td>
<td></td>
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<tr>
<td>Buses</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

29. Do you use a financial only and/or full-service lease?
   [ ] Financial only
   [ ] Full-service

   If financial lease: Is your financial lease an open-end lease and/or closed-end lease? Select all that apply.
   [ ] Open-end lease
   [ ] Closed-end lease

   If both open-end and closed-end: What percent of your leased vehicles are closed-ended?
   ______ % closed-end leases

   If financial lease: Why don’t you use a full service lease?
   [ ] Cost
   [ ] Have a fleet department
   [ ] No need
   [ ] Management decision
   [ ] Not offered
   [ ] Poor service
   [ ] Don’t know
   [ ] Other ________________________________ Probe

If full service lease, continue. Else, skip to Q31
30. **If full-service lease:** Using a 10-point scale where 10 is most important, how important is it that your primary leasing vendor provide the following services? Is that service available to you?

<table>
<thead>
<tr>
<th>Rating</th>
<th>Available</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Administrative Programs</strong></td>
<td></td>
</tr>
<tr>
<td>Vehicle title, license check, registration, and permit</td>
<td></td>
</tr>
<tr>
<td>Accident/collision management</td>
<td></td>
</tr>
<tr>
<td>Assistance in vehicle selection process</td>
<td></td>
</tr>
<tr>
<td>Assumes residual value risk at end of lease term</td>
<td></td>
</tr>
<tr>
<td>Disposes of vehicles at end of contract term</td>
<td></td>
</tr>
<tr>
<td><strong>Certification Programs</strong></td>
<td></td>
</tr>
<tr>
<td>Assists in evaluating, hiring, and training drivers</td>
<td></td>
</tr>
<tr>
<td>Conducts driver safety programs</td>
<td></td>
</tr>
<tr>
<td>Provides DOT or other driver certification</td>
<td></td>
</tr>
<tr>
<td><strong>Fueling Programs</strong></td>
<td></td>
</tr>
<tr>
<td>Full-service fueling at leasing facility network</td>
<td></td>
</tr>
<tr>
<td>Provides universal fuel credit card program</td>
<td></td>
</tr>
<tr>
<td>Prepares fuel tax reporting</td>
<td></td>
</tr>
<tr>
<td><strong>Billing Programs</strong></td>
<td></td>
</tr>
<tr>
<td>Centralized billing</td>
<td></td>
</tr>
<tr>
<td>On-line billing</td>
<td></td>
</tr>
<tr>
<td><strong>Maintenance Programs</strong></td>
<td></td>
</tr>
<tr>
<td>Preventive maintenance (oil change, filters)</td>
<td></td>
</tr>
<tr>
<td>Corrective maintenance repairs (engine and brake)</td>
<td></td>
</tr>
<tr>
<td>Emergency road service</td>
<td></td>
</tr>
<tr>
<td>Loaners during emergencies or repair downtime</td>
<td></td>
</tr>
<tr>
<td>Tire replacement service</td>
<td></td>
</tr>
<tr>
<td>Glass replacement service</td>
<td></td>
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<tr>
<td><strong>Reporting</strong></td>
<td></td>
</tr>
<tr>
<td>Accumulated vehicle depreciation</td>
<td></td>
</tr>
<tr>
<td>Book value after payment</td>
<td></td>
</tr>
<tr>
<td>Repair and maintenance cost reporting</td>
<td></td>
</tr>
<tr>
<td>Service provider reporting</td>
<td></td>
</tr>
<tr>
<td>Vehicle service history reporting</td>
<td></td>
</tr>
<tr>
<td><strong>Miscellaneous</strong></td>
<td></td>
</tr>
<tr>
<td>Obtains insurance coverage</td>
<td></td>
</tr>
<tr>
<td>Paint or decal vehicles to fleet specifications</td>
<td></td>
</tr>
<tr>
<td>Provides rentals during peak periods</td>
<td></td>
</tr>
</tbody>
</table>

31. On a scale of 1 to 10, with 10 being extremely satisfied, how satisfied are you with the service provided by your primary leasing company?

   _____ Satisfaction rating

   **If rated less than a seven (7), ask:** Why did you rate your satisfaction with your current supplier a *(read rating)*?

32. Using the same 10-point scale, how likely would you be to use your current primary leasing supplier when the time comes to renew or extend your contract and/or add vehicles to your fleet?
33. Do you ever rent additional vehicles during the year to supplement your fleet?

[  ] Yes  
[  ] No  

If yes: How many vehicles were rented in 2003?

_____ Number of vehicles rented

MAINTENANCE & TBA ISSUES

Next, I would now like to ask you a few questions regarding your fleet maintenance activities and your procurement of after market vehicle parts.

34. If lease: Does your primary leasing company provide services that assist you in developing strategies to reduce your cost of maintenance?

[  ] Yes  
[  ] No

35. Is your preventive maintenance performed on your property or at an off-site location?

[  ] On-site  
[  ] Off-site  
[  ] Both On-site and Off-site

If both on-site and off-site, ask: What percent of you your preventive maintenance is performed on-site versus off-site?

_____ % On-site  
_____ % Off-site

If on-site: Do you operate your on-site maintenance facility yourself or do you outsource the operation to a third-party? Select one.

[  ] Company Operated  
[  ] Outsources

If self-operated: Would you be interested in outsourcing the management and operation of your maintenance facility to a third-party?

[  ] Yes  
[  ] No

If on-site: Do you use a mobile maintenance service to perform preventive maintenance on-site on your fleet vehicles?

[  ] Yes  
[  ] No
If off-site: Which type of service center do you primarily use for your preventive maintenance? Do you use an OEM vehicle dealership, leasing company, independent third-party garage, national chain (including quick lube), oil company station with service bays, or truck stop/travel plaza with service bays? Select one.

[ ] OEM vehicles dealership
[ ] Leasing company
[ ] Independent third-party garage
[ ] National chain
[ ] Oil company station with service bays
[ ] Truck stop/travel plaza with service bays

36. By 2008, do you expect your mix between on-site and off-site maintenance to shift?

[ ] Yes
[ ] No

If yes: What percent of your preventive maintenance will be on-site versus off-site in 2008?

_____ % on-site
_____ % off-site

37. If outsource or offsite, ask: On a scale of 1 to 10, with 10 being extremely satisfied, how satisfied are you with your current preventive maintenance provider?

Satisfaction rating

If rated less than a seven (7): Why did you rate your satisfaction with your current supplier a (read rating)?

[ ] High cost
[ ] Slow service
[ ] Nothing
[ ] Poor quality
[ ] Lack of trust
[ ] Poor customer service
[ ] Poor reporting
[ ] Inexperienced staff
[ ] Other ________________________________ Probe

38. About how many times per year do you have preventive maintenance performed on your (read vehicle type/next)?

39. On average, how much does it cost (per vehicle) each time you perform preventive maintenance on your (read vehicle type/next)?

<table>
<thead>
<tr>
<th>Vehicle Type</th>
<th># Maint/Year</th>
<th>Cost/Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sedans</td>
<td></td>
<td></td>
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<tr>
<td>LD Trucks</td>
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<td>MD Trucks</td>
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<td>Tractor-Semis</td>
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<td>Buses</td>
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<tr>
<td>Other</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
40. **If using on-site as a method of preventive maintenance and not outsourcing maintenance:** Do you keep inventories of vehicle replacement parts?

[ ] Yes  
[ ] No

**If yes:** What do you typically spend per year to stock your inventory? What is the value of your current inventory on-hand?

_____ Annual inventory expenditures  
_____ Current value of inventory

41. When buying tires for your fleet vehicles, do you purchase new tires, retread tires or both types? **Select one.**

[ ] New tires  
[ ] Retread  
[ ] Both new and retread

**If using both new and retread:** What percent of your tire replacement purchases are new versus retread?

_____ % New  
_____ % Retread

**ON-SITE FUELING**

42. Do you fuel any of your fleet vehicles on-site (using either tanks or a mobile fueling service) and/or do you fuel any of your fleet vehicles off-site?

[ ] On-site  
[ ] Off-site  
[ ] Both On-site and Off-site

**If using both on-site and off-site, ask:** What percent of your fueling is on-site versus off-site?

_____ % On-site  
_____ % Off-site

**If any on-site, ask:** Which method of fueling do you primarily use when fueling on-site? Do you use USTs, ASTs, or a mobile fueling service? **Select one.**

[ ] USTs  
[ ] ASTs  
[ ] Mobile refueling

**If off-site, ask:** Which type of facility do you primarily use when fueling off-site? Do you use retail stations, truck stops, or cardlocks (either unattended or at retail stations)? **Select one.**

[ ] Retail stations  
[ ] Truck stops  
[ ] Cardlocks

43. **If any on-site refueling ask:** When your vehicles fuel on-site, what percentage of your (read vehicle type/next) fuel with stationary tanks versus mobile fueling?
44. **If any off-site refueling ask:** When your vehicles fuel off-site, what percentage of your (read vehicle type/next) fuel at retail/truck stop/cardlock facilities?

<table>
<thead>
<tr>
<th>Vehicle</th>
<th>On-site Method</th>
<th>Off-site Methods</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Stationary Tanks</td>
<td>Mobile</td>
<td>Retail</td>
</tr>
<tr>
<td>Sedans</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>LD Trucks</td>
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<td>HD Trucks</td>
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<td>Tractor-Semis</td>
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<td>Buses</td>
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</table>

45. Do you expect your mix of on-site and off-site fueling will change by 2008?
   - [ ] Yes
   - [ ] No

   **If yes:** How do you expect your fuel consumption to breakout between on-site and off-site by 2008?
   - % On-site
   - % Off-site, **if 100%, skip to Q50**

46. **If on-site, ask:** Do you expect your mix of on-site fueling methods will change by 2008?
   - [ ] Yes
   - [ ] No

   **If yes:** How will your on-site fueling breakout between stationary tanks versus mobile fueling in 2008?
   - % Stationary tanks
   - % Mobile refueling

47. **If on-site, ask:** There are fuel purchasing techniques, such as hedging, that reduce the risk associated with fuel price spikes. Using a 10-point scale where 10 is most important, how important is it for you to know what price you will pay for fuel in the future?
   - Importance of knowing price for future fuel

48. **If on-site, ask:** Do you use hedging or other risk management techniques?
   - [ ] Yes
   - [ ] No

49. **If on-site, ask:** Does your on-site fueling system provide reporting that reconciles your bulk fuel purchases with the fuel dispensed to your vehicles?
   - [ ] Yes
   - [ ] No

   **If no:** Would you like to reconcile bulk purchases with fuel dispensed to your vehicles?
   - [ ] Yes
   - [ ] No
OFF-SITE FUELING

If no Offsite, skip to Q68.

50. When you fuel your vehicles off-site at (read first facility type/next), do you usually go to the same location, different location but the same brand, or different locations and different brands?

<table>
<thead>
<tr>
<th>Retail</th>
<th>CardLock</th>
<th>Truck Stop</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ]</td>
<td>[ ]</td>
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</tr>
</tbody>
</table>

51. How many miles away from home-base or off route do you drive to get to your fueling facility?

- [ ] Miles to retail station
- [ ] Miles to truck stop
- [ ] Miles to cardlock

PAYMENT METHODS

My next set of questions deal with your payment methods for off-site fuel and maintenance purchases only.

52. If fueling off-site, ask: How do your methods of payment for fuel break out among credit cards, cash, pre-paid cards, vouchers, driver reimbursement, and on-account?

- [ ]% Credit Cards (including bank, fleet, oil, ATM, Govt., etc.)
- [ ]% Cash
- [ ]% Vouchers
- [ ]% On-account
- [ ]% Pre-paid fuel card
- [ ]% Driver reimbursement
- [ ]% Other

53. Do you expect your mix of off-site payment methods to change by 2008?

- [ ] Yes
- [ ] No

If yes: How will your mix of payment methods breakout by 2008?

- [ ]% Credit Cards (including bank, fleet, oil, ATM, Govt., etc.)
- [ ]% Cash
- [ ]% Vouchers
- [ ]% On-account
- [ ]% Pre-paid fuel card
- [ ]% Driver reimbursement
- [ ]% Other
54. Do your drivers have RFID transmitters that they use to initiate the fueling process?

[ ] Yes
[ ] No

If no: Would you like them to have RFID transmitters?

[ ] Yes
[ ] No
[ ] Don’t know
[ ] Refused

55. Have you had any experience with fraud or misuse relating to company fuel purchases?

[ ] Yes
[ ] No, Skip to Q56

If yes: Did the misuse occur with a credit card, cash, prepaid cards, vouchers, RFID, driver reimbursement, or a station account? Select all that apply.

[ ] Credit card
[ ] Cash
[ ] Prepaid card
[ ] Voucher
[ ] RFID
[ ] Driver reimbursement
[ ] Station account

If currently using a credit card, skip to Q57.

56. Do you plan to use a card program by 2008?

[ ] Yes
[ ] No

If yes: What is the single most important benefit you expect from using a card program? Select one.

[ ] Discounts
[ ] Reduced paperwork
[ ] Use at any station
[ ] None
[ ] Purchase control
[ ] Other ____________________________ Probe

If no: What do you think are the drawbacks of a card program? Select all that apply and skip to Q70.

[ ] Loss of control
[ ] Program management
[ ] Card/program fees
[ ] Card handling-lose, damage, etc.
[ ] No need for card
[ ] Can’t use at all locations
[ ] Don’t know
[ ] Other ____________________________ Probe
57. What is the name on your primary card used for fueling? Is the card issuer a bank, government, leasing company, oil company, or third-party? Is the card affiliated with a major network such as MasterCard, Visa, or American Express? Is it a personal card or a business card? If a business card, does it provide fleet reporting? Is it a credit or debit card? Is the card accepted at any gas station, only at one brand of locations, or only at one station?

<table>
<thead>
<tr>
<th>Card Name</th>
<th>Oil Co</th>
<th>3rd Pty</th>
<th>Lease Co</th>
<th>Bank</th>
<th>Other</th>
<th>Ntwk</th>
<th>Pers</th>
<th>Corp</th>
<th>Fleet</th>
<th>Cdr</th>
<th>Deb</th>
<th>U</th>
<th>Bad</th>
<th>Loc</th>
</tr>
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</tr>
</tbody>
</table>

If not universal, ask: Would you prefer a card that was more universally accepted than your primary card?

[ ] Yes
[ ] No

58. What is the single most important reason you use your primary card program that other card programs don’t offer? Select one.

[ ] Reporting
[ ] Location
[ ] Discounts
[ ] Loyalty rewards such as ‘airline miles’ and ‘cash back’
[ ] Cost
[ ] Convenience
[ ] Control
[ ] First to solicit me
[ ] Company policy
[ ] Always used
[ ] Other ________________________________ 

59. Is your primary card program used for fuel only, both fuel and maintenance, or all fleet purchases including business expenses?

[ ] Fuel only
[ ] Both fuel and maintenance
[ ] All fleet purchases including business expenses

If all fleet purchases, ask: What types of merchandise and services do you allow to be purchased with your card (read first feature/next)? Select all that apply.

[ ] C-store merchandise
[ ] Food
[ ] Car wash
[ ] Maintenance
[ ] Major repair
[ ] TBA merchandise
[ ] Travel & entertainment
[ ] Emergency cash
[ ] Auto rental
[ ] Office supplies
If not used for all fleet purchases, ask: If a universal fleet card was available that provided controls at the card level that enabled certain cards to be used for all purchases including business expenses and that card offered discounts based on total purchases, would you be very likely, somewhat likely, neither likely nor unlikely, somewhat unlikely or very unlikely to switch to that card? Select one.

[ ] Very likely
[ ] Somewhat likely
[ ] Neither likely nor unlikely
[ ] Somewhat unlikely
[ ] Very unlikely

60. Would you consider purchasing specific safety items such as roadside assistance and passive backup warning systems through your fleet card provider?

[ ] Yes
[ ] No

61. Is your off-site fuel purchase price based on standard retail pricing or do you receive special pricing?

[ ] Standard retail pricing
[ ] Special pricing

If standard: If offered special pricing, which type of arrangement would you prefer, cost-plus, retail-minus, or a fixed cost (hedging)? Select one.

[ ] Cost-plus
[ ] Retail-minus
[ ] Fixed cost (hedging)

If special pricing, continue. Else skip to Q62

What is pricing based on, cost-plus, retail-minus, or a fixed cost (hedging)? Select one.

[ ] Cost-plus
[ ] Retail-minus
[ ] Fixed cost (hedging)

If special: Do you receive a discount according to your purchases during a billing period?

[ ] Yes
[ ] No, Skip to Q62

If yes: Is the discount a fixed percentage or does it vary based on purchase amount?

[ ] Fixed percent
[ ] Varies based on purchases

62. Does your fleet qualify for tax exemption on fuel purchases?

[ ] Yes
[ ] No

If yes: Does your current fuel supplier provide you with tax credit at point of purchase, tax credit report – submitted on your behalf by your supplier, tax credit report provided to you by your supplier and you submit, or no tax information provided at all? Select one.

[ ] Supplier submits tax credit
[ ] Tax report provided and I submit
[ ] No tax information provided

63. If your card supplier provided you with an online account where you could access your fleet card usage reports and pay your bill using ebanking, would you use it?

[ ] Yes
[ ] No
64. Bills can be paid by (read first settlement method/next), which payment method would you prefer? Select one.

[ ] Internet ebanking
[ ] Check
[ ] Electronic fund transfer (EFT)
[ ] Prepay
[ ] Vouchers
[ ] Cash

If EFT is not mentioned, ask: If your supplier were to offer an incentive for using EFT would you be would you be very likely, somewhat likely, neither likely nor unlikely, somewhat unlikely or very unlikely to use it? Select one.

[ ] Very likely
[ ] Somewhat likely
[ ] Neither likely nor unlikely
[ ] Somewhat unlikely
[ ] Very unlikely

If EFT is mentioned, ask: Do you use EFT?

[ ] Yes
[ ] No

If yes: Do you receive an incentive to use EFT?

[ ] Yes
[ ] No

65. On a scale of 1 to 10, with 10 being extremely satisfied, how satisfied are you with your primary card program?

______ Satisfaction rating

If less than 9, ask: What could your card provider do to make you more satisfied with their card?

[ ] Discounts
[ ] Revolving credit
[ ] Nothing
[ ] More locations
[ ] Better reporting
[ ] Lower card fees
[ ] Better service
[ ] Other ________________________________ Probe

66. Information about card programs is available from (read list). How was your primary card program introduced to you? Select all that apply.

[ ] POS (Point of Sale brochure)
[ ] Mail
[ ] Sales call
[ ] Personal/company research
[ ] Don’t know/don’t handle

If sales call, ask: Did a sales rep visit or was all of the information provided over the phone?

[ ] Yes
[ ] No

If research, ask: Did you use the Internet to research your card program?

[ ] Yes
[ ] No
67. If you were considering a new fleet card program, using a 10 point scale where 10 is most important, how important would sales visits to your office be in your decision to signup for a new fleet card program?

_____ Importance rating

**Fleet Administration Issues**

Next, I would now like to ask you a few questions regarding how you administer your fleet vehicles.

68. How are decisions made; by you alone, in consultation with superiors, or by committee? **Select one.**

[   ] Alone, **skip to Q71**

[   ] Consultation with supervisors, **skip to Q71**

[   ] Committee

69. **If by committee, ask:** About how many years ago did your company begin making fleet procurement decisions by committee?

_____ Years

70. **If by committee, ask:** What was the driving factor for your company’s move to make fleet related decisions by committee? **Probe for single factor.**

[   ] Cost

[   ] Eliminated fleet department

[   ] Small company makes group decisions

[   ] Always had committee

[   ] Facilitates more effective decision making

[   ] Bid process requires committee decisions

[   ] Management mandated company policy

[   ] Provides management stronger control

[   ] Company growth

[   ] Don’t know

[   ] Other ____________________________ **Probe**

71. Does your company have fleet operations outside of the United States?

[   ] Yes

[   ] No, **skip to Q72**

**If yes, ask:** Are any fleet activities managed on a global basis?

[   ] Yes

[   ] No
If yes, ask: Which activities?

[ ] Procurement
[ ] Logistics
[ ] Maintenance
[ ] Don’t know
[ ] Other ____________________________ Probe

Which department is responsible for managing your global fleet? Select one.

[ ] Fleet department
[ ] General management (Non-departmentalized)
[ ] Transportation/shipping department
[ ] Vehicle maintenance department
[ ] Operations department
[ ] Purchasing/procurement department
[ ] Risk management department
[ ] Marketing department

What is the title of that department head?
Department head title ____________________________

If no, ask: Do you expect to begin global fleet management between now and 2008?

[ ] Yes
[ ] No

If yes, ask: Which activities?

[ ] Procurement
[ ] Logistics
[ ] Maintenance
[ ] Other ________________________________ Probe

72. Does your company have a safety policy in place?

[ ] Yes
[ ] No

If no: Why not?

[ ] Cost
[ ] No need
[ ] All drivers trusted
[ ] Other ________________________________ Probe

If yes: Does your safety policy include (read list)? Select all that apply.

[ ] Motor Vehicle Record (MVR) program
[ ] Accident Program
[ ] Training Program
73. Collision warning and adaptive cruise control are safety technologies that reduce accidents. Thinking about a typical vehicle, how much would you save if you were able to reduce your accident rate by 50 percent? **Probe for sources of savings.**

$___________ Estimated savings per vehicle

**If yes:** Where would that savings come from?

[ ] Lower insurance cost
[ ] Lower direct cost
[ ] Lower indirect cost
[ ] Reduce vehicle downtime
[ ] Reduce maintenance costs
[ ] No benefit
[ ] Don’t know
[ ] Other ________________________________ **Probe**

74. **If MD/HD:** If it cost about $2,500 to equip your medium and heavy duty truck with this technology, would you be very likely, somewhat like, neither likely nor unlikely, somewhat unlikely or very unlikely to order your new vehicles with these onboard radar technologies? **Select one.**

[ ] Very likely
[ ] Somewhat likely
[ ] Neither likely nor unlikely
[ ] Somewhat unlikely
[ ] Very unlikely

**If no current credit card use skip to Q77.**

75. Do you purchase insurance for your fleet vehicles, is your company self-insured, or is it the driver’s responsibility to provide insurance? **Select one.**

[ ] Purchase insurance
[ ] Company is self-insured
[ ] Driver’s responsibility

76. On a scale of 1 to 10 where 10 is very likely, how likely would you be to consider purchasing fleet insurance and/or accident management programs from you fleet card provider?

_____ Likely rating

77. By 2008, do you expect your average per-vehicle vehicle insurance rates to increase, decrease, or remain the same?

[ ] Increase
[ ] Decrease
[ ] Stay the same

**If increase:** What will be the primary factor leading to this increase? **Select one.**

[ ] Inflation
[ ] Newer vehicles
[ ] Nature of business
[ ] Insurance companies looking to increase revenues
[ ] Premiums cover others’ accidents
[ ] Increase in fleet size
[ ] Other ________________________________
If decrease: What will be the primary factor leading to this decrease? Select one.

[ ] Safety programs
[ ] Higher deductibles
[ ] Older vehicles
[ ] Anticipate better drivers’ records
[ ] Competition among insurance companies will lead to lower rates
[ ] Emergence of co-op buying group
[ ] Other ________________________________  Probe

78. I would like to read you a list of services and have you tell me if you outsource management of that service, the first service is (read list/next)? If one or no service is outsourced skip to Q80.

Outsource

[ ] Vehicle procurement
[ ] Vehicle financing
[ ] Vehicle remarketing
[ ] Motor vehicle registration record procurement
[ ] License renewal
[ ] Drivers
[ ] Driver safety training
[ ] Logistics
[ ] Fuel management
[ ] Maintenance
[ ] Roadside assistance
[ ] Accident services
[ ] Management reporting

79. If outsourcing more than one service, ask: Are any of your vendors providing more than one service?

[ ] Yes
[ ] No, Skip to Q80

If Yes: What type of company is providing these services (read list)? Select one.

[ ] Leasing company
[ ] Vehicle dealer
[ ] Oil company
[ ] Third-party garage
[ ] Bank
[ ] Vehicle manufacturer
[ ] Shipping company
[ ] Other

80. Do you track fuel expenses?

[ ] Yes
[ ] No, Skip to Q81

Do you track fuel expenses at the vehicle level?

[ ] Yes
[ ] No
81. Do you track maintenance expenses?
   [  ] Yes
   [  ] No, If neither fuel nor maintenance expenses tracked skip to Q84

   Do you track maintenance expenses at the vehicle level?
   [  ] Yes
   [  ] No

82. Using the same 10-point scale, how important is it to track all vehicle expenses in one system?
   ________ Importance rating

83. Do you track all vehicle expenses in one system?
   [  ] Yes
   [  ] No

   If yes: What type of system do you use (read list)? Select one.
      [  ] Fleet management software
      [  ] PC spreadsheet
      [  ] Manual paper log
      [  ] Internet based service
      [  ] In-house proprietary software
      [  ] Commercial accounting software
      [  ] Other ________________________________ Probe

84. Common methods of collecting expenses are (read list). What methods are used to collect information on your fleet expenses? Select all that apply.
      [  ] Manual tallying (gathering receipts, driver logs, etc.)
      [  ] Mail (bills/invoices through mail service)
      [  ] Direct link (host-to-host link with provider’s mainframe)
      [  ] EDI (Electronic Data Interchange)
      [  ] Internet sites

85. How do you use the expense information you receive (read list)? Select all that apply.
      [  ] Verify valid expenses
      [  ] Identify exceptions
      [  ] Integrate into your electronic accounting system
      [  ] To negotiate discounts with fleet suppliers
      [  ] Notify when repairs are due
      [  ] Don’t use
      [  ] Don’t know

86. What is the most important information you receive that assists you in managing your fleet? Would it be (read list) or something else? Select one.
      [  ] Fuel reports
      [  ] Maintenance reports
      [  ] Consolidated reports
      [  ] Cost of operation reports
      [  ] Driver reports/records
      [  ] Mileage reports
      [  ] Other ________________________________ Probe
87. Internet web applications provided by your vendors can be used for (read list). Which web applications do you use? Select all that apply.

[ ] Vehicle procurement
[ ] License renewal
[ ] Fleet cost tracking
[ ] Customer service/Account maintenance
[ ] Management reporting
[ ] Vehicle parts procurement
[ ] Driver background checks
[ ] Other ________________________________  Probe
[ ] I do not use web applications.  Skip to Q92

88. If does not use web applications skip to Q92: Do you use Internet web applications to purchase fleet items?

[ ] Yes
[ ] No

If yes: Which ones? Select all that apply.

[ ] Fuel
[ ] Maintenance
[ ] Vehicles
[ ] Vehicle parts
[ ] Other ________________________________  Probe

89. Do you use Internet web applications to track costs or identify exceptions?

[ ] Yes
[ ] No

If yes: Which ones? Select all that apply.

[ ] Fuel
[ ] Maintenance
[ ] Parts/inventory
[ ] Other ________________________________  Probe

90. Do you use web applications to produce reports for your organization?

[ ] Yes
[ ] No

If yes: On what? Select all that apply.

[ ] Fuel Reports
[ ] Maintenance Reports
[ ] Parts inventory
[ ] Accident
[ ] Other ________________________________  Probe
91. What improvements would you like your fleet vendor to make to their web applications?

[ ] Technical support
[ ] Custom reports
[ ] None
[ ] Improve navigation and functionality
[ ] Provide technical specifications for vehicles
[ ] Consolidated maintenance and fuel reports
[ ] Don’t know
[ ] Other ________________________________  Probe

92. Telematic devices provide two way voice and data communication with your fleet providing four benefits:

ENHANCED COMMUNICATION – meaning it provides driving directions, traffic alerts, maps, and access to local information such as hotels and restaurants.

ENHANCED SAFETY – meaning it provides notification of air bag deployment, GPS location of vehicles in distress and disabling stolen vehicles.

ENHANCED MAINTENANCE – meaning it reports engine fault codes, provides early warning prior to breakdowns and notifications of scheduled maintenance.

ENHANCED EFFICIENCY – meaning it provides logistics tracking and scheduling information so the fleet is operating as efficiently as possible.

Using a 10 point scale where ten is most important, how important is (read first benefit/next) to your fleet?

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<thead>
<tr>
<th>Rating</th>
<th>Benefit</th>
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<tbody>
<tr>
<td></td>
<td>Enhanced communication</td>
</tr>
<tr>
<td></td>
<td>Enhanced safety</td>
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<tr>
<td></td>
<td>Enhanced maintenance</td>
</tr>
<tr>
<td></td>
<td>Enhanced efficiency</td>
</tr>
</tbody>
</table>

93. There is an up-front equipment charge and a monthly fee for two-way communication with your fleet. Thinking about communication and safety benefits, is a cost savings also required in order to justify purchasing telematics devices for your fleet?

[ ] Yes
[ ] No

If yes, Would you be satisfied if the savings paid for itself over the life of the vehicle?

[ ] Yes
[ ] No

94. If they lease, ask: Should your leasing company offer telematics and include the cost in your lease?

[ ] Yes
[ ] No

If yes, Should vehicle reports you access on the Internet combine leasing and telematics data?

[ ] Yes
[ ] No
95. Have you purchased telematics devices for your fleet?

[ ] Yes, Skip to Q96
[ ] No, Continue

If don’t use any telematic devices: By 2008, do you anticipate adopting telematic technology for driver-to-dispatcher communication, vehicle tracking, trailer tracking, or remote vehicle diagnostics?

[ ] Yes
[ ] No

Skip to Q104

96. Do you use telematic devices to support your driver-to-dispatcher communication, vehicle tracking, trailer tracking, or remote vehicle diagnostics? Select all that apply.

[ ] Driver-to-dispatcher communication
[ ] Vehicle tracking
[ ] Trailer tracking
[ ] Remote vehicle diagnostics
[ ] No, do not use

If use driver-to-dispatcher communication: How many telematic driver-to-dispatcher communication units do you have in service?

_______ Number of driver-to-dispatcher units

If use driver-to-dispatcher communication: For what purpose do you use telematic driver-to-dispatcher communication devices? Select all that apply.

[ ] Voice communication
[ ] Text messaging
[ ] Street level mapping and rerouting
[ ] Estimating arrival and departure times
[ ] Productivity and customer call reports
[ ] Driver log reports and state line crossings
[ ] Fuel tax reporting

If use vehicle tracking: How many telematic vehicle tracking units do you have in service?

_______ Number of vehicle tracking units

If use vehicle tracking: For what purpose do you use telematic vehicle tracking devices? Select all that apply.

[ ] Tracking truck location, speed, and direction
[ ] Monitoring truck inventory
[ ] Disabling trucks for unauthorized use (also called Geo-Fencing)
[ ] Improving mileage by tracking speed, idling, unauthorized use
[ ] Scheduled maintenance alerts
[ ] Engine fault codes and low battery alerts
[ ] Ability to unlock doors

If use trailer tracking: How many telematic trailer tracking units do you have in service?

_______ Number of trailer tracking units
If use trailer tracking: For what purpose do you use telematic trailer tracking devices? Select all that apply.

[ ] Monitoring inventory and idle trailers
[ ] Recovering lost trailers
[ ] Reefer fault alert
[ ] Monitoring open and closed trailer doors

If use remote vehicle diagnostics: How many telematic vehicle diagnostic units do you have in service?

________ Number of remote diagnostic units

If use remote vehicle diagnostics: For what do you use telematic vehicle diagnostic devices?

[ ] Engine trouble alerts
[ ] Odometer readings
[ ] Fuel level readings
[ ] RPM level readings
[ ] Airbag deployments

97. When considering telematic systems, there are two types of system implementations, hardwired in-vehicle systems and mobile handheld telephones with GPS capabilities. Which type of system do you prefer?

[ ] Hardwire
[ ] Handheld
[ ] Don’t know

98. Do you use telematics devices for any other purposes?

[ ] Yes
[ ] No

99. What changes has telematics had in the way you manage your fleet?

[ ] Lower cost
[ ] On time deliveries
[ ] Increase in communication
[ ] Don’t know
[ ] Other ________________________________

100. What function within your organization benefits most from telematics applications? Select One.

[ ] Operations
[ ] Logistics
[ ] Don’t know
[ ] Other ________________________________ Probe

101. Who is your vendor for telematic devices? Select one.

[ ] Vehicle manufacturer
[ ] Leasing
[ ] Third-party vendor
[ ] Other ________________________________ Probe
102. Using a 10 point scale where 10 is most important, how important is it that reporting from your telematics system be integrated into your other fleet management reporting system so you have a single source for fleet management information?

______ Importance rating

Do you have a single integrated fleet management system?

[ ] Yes
[ ] No

103. Thinking about only telematic equipment, what is your preferred payment method for your telematic devices, an up-front capital outlay or a monthly fee?

[ ] Upfront capital outlay
[ ] Monthly fee

**ADVANCED VEHICLE TECHNOLOGIES**

Next, I would like to talk with you about advanced vehicle technologies.

104. Are you directly involved with your organization’s evaluation of advanced vehicle technologies including alternative fuels, fuel cells, electric hybrid, and hydraulic hybrid?

[ ] Yes
[ ] No, Thank respondent and end questionnaire.

105. Does your company have a plan for your fleet to move to high efficiency vehicles?

[ ] Yes
[ ] No

**If yes:** Thinking about a typical vehicle, what cost savings per year do you anticipate?

___________ Cost savings per year

106. By 2008, what percent of your vehicles would you likely have equipped with alternative fuels, fuel cells, electric hybrid, hydraulic hybrid?

______ % with alternative fuels
______ % with fuel cells
______ % with electric hybrid
______ % with hydraulic hybrid

That is all the questions I have. Could I send you a report on best fleet management practices after the study is complete?

Verify contact information and ask for email address.

**Thank Respondent!**
SECONDARY QUESTIONNAIRE

THE U.S. COMMERCIAL FLEET MARKET FORECAST
ISSUES AND SURVEY QUESTIONS

<table>
<thead>
<tr>
<th>Business Name:</th>
<th>Consultant:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact:</td>
<td>Date:</td>
</tr>
<tr>
<td>Title:</td>
<td>Start Time:</td>
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<td>Email#</td>
<td>End Time:</td>
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<td>Zip:</td>
<td>Telephone:</td>
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<tr>
<td>Business:</td>
<td></td>
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<tr>
<td>Region:</td>
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<tr>
<td>Fleet Size:</td>
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</table>

I would like to speak with the person most responsible for the acquisition, administration, and maintenance of your company operated vehicles.

Hello, my name is _________ from Havill & Company. We are an independent consulting firm located in Toledo, Ohio and are conducting a study of the commercial fleet market. We are asking a few questions regarding your company-operated vehicles. We are not selling anything and as a way of thanking you, we would like to send you a report on best fleet practices based on this study. Could I take a moment to ask you a few questions?

If they ask who the study is for, tell them: The study is sponsored by a group of leading vehicle manufacturers, leasing companies, and major oil companies who asked us to find out what fleet operators like you are looking for in the next generation of products.

1. Excluding trailers, how many vehicles do you operate (including company sedans, pickups, vans, and SUVs)? **If less than 4 vehicles, thank the respondent and terminate.**

2. What is the nature of your business? **Confirm segment:** So, I should designate you as *(read appropriate business segment)*? **Select one.**

3. Which of the following locations best describes the location at which you are the fleet manager, single location with no branches, branch location reporting to a headquarters, headquarters with branches reporting to you? **Select one.**
4. What percent of your vehicles were acquired new versus used? **Must add to 100%**.
   
   _____ % New
   _____ % Used

5. What percent of your vehicles are owned versus leased? **Must add to 100%**
   
   _____ % Owned
   _____ % Leased

6. How many of your fleet vehicles are sedans, light duty trucks, medium duty trucks, heavy duty trucks tractor semis (excluding trailers), other heavy duty trucks excluding tractor semis, buses, other?

   **KEY TO CLASSIFYING LD, MD, AND HD SINGLE BODY TRUCKS**
   
   LD = Classes 1 and 2  MD = Classes 3, 4, and 5  HD = Classes 6, and 7
   (10,000 lbs. GVW or below)  (10,001 to 19,500 lbs. GVW)  (19,501 lbs. GVW and more)

7. How many miles per gallon to you get for your **(read vehicle type/next)**?

8. What percentage of your **(read vehicle type/next)** vehicles would you characterize as operating in an urban traffic cycle with frequent braking and accelerating?

<table>
<thead>
<tr>
<th>Vehicle Type</th>
<th># of Vehicles</th>
<th>MPG</th>
<th>% Urban</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sedans</td>
<td></td>
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<tr>
<td>LD Trucks</td>
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<tr>
<td>MD Trucks</td>
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<td></td>
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<tr>
<td>HD Trucks</td>
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<tr>
<td>Tractor-Semis</td>
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<td>Buses</td>
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<td>Other</td>
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</tbody>
</table>

9. **If they have tractors, ask:** How many trailers does your fleet operate?
   
   _____ Number of trailers

The next group of questions deal with your future fleet vehicle procurement plans.

10. Do you intend to purchase any diesel trucks between now and 2008?

    [ ] Yes
    [ ] No

    **If Yes:** Are you familiar with the new engine types mandated in 2007 that burn low sulfur diesel?

    [ ] Yes
    [ ] No

    Do you intend to pre-buy in advance of the regulations taking effect?

    [ ] Yes
    [ ] No
VEHICLE PROCUREMENT

Next, I would like to ask you questions about the procurement of your vehicles.

11. Do you replace your vehicles based on number of years, number of miles, or as needed? **Select one.**
   - [ ] Number of years
   - [ ] Number of miles
   - [ ] As needed, **skip to Q13**

12. After how many (years/miles) do you replace your (read vehicle type/next)?

<table>
<thead>
<tr>
<th>Vehicle Type</th>
<th>Total Years</th>
<th>Total Miles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sedans</td>
<td></td>
<td></td>
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<td>LD Trucks</td>
<td></td>
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<tr>
<td>MD Trucks</td>
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<td>HD Trucks</td>
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<td>Buses</td>
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<tr>
<td>Other</td>
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</tbody>
</table>

13. I would like to read you a list of information sources used to research vehicle purchases and have you tell me if you use them. Do you use *(read list)*? **Select all that apply.**
   - [ ] Trade magazines
   - [ ] Company brochures
   - [ ] Manufacturer websites
   - [ ] Dealer showrooms
   - [ ] Dealer websites
   - [ ] Sales rep visits
   - [ ] Personal contacts
   - [ ] Government Sources
   - [ ] Trade shows
   - [ ] Other_________________________________________

14. Thinking about local dealerships, how do you prefer to hear about their vehicles and services? **Select all that apply.**
   - [ ] Mail
   - [ ] Email
   - [ ] Telephone call
   - [ ] Personal sales call
   - [ ] Website
   - [ ] Other_________________________________________

15. How do you prefer to finalize your purchase or lease? Through *(read list)* **Select one.**
   - [ ] Sales rep visit
   - [ ] Visit to the dealer
   - [ ] Over the Internet
   - [ ] Over the telephone
   - [ ] Bid process
   - [ ] Corporate decision
   - [ ] Other_________________________________________
16. Thinking about the brand of vehicle you last purchased or leased, what was the primary reason for choosing that brand that was not available from other brands you shopped? What was the next most important factor in your brand decision?

<table>
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<tr>
<th>First</th>
<th>Second</th>
<th>Factor</th>
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<tbody>
<tr>
<td></td>
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<td>Cost</td>
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<td>Brand</td>
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<td>Service</td>
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<td>Other</td>
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</tbody>
</table>

17. Do you prefer an American nameplate or a foreign nameplate or is it not important in your vehicle selection decision? Select one.
- [ ] American
- [ ] Foreign
- [ ] Not important

18. Do you think there is a difference in the residual values between an American nameplate and a foreign nameplate?
- [ ] Yes
- [ ] No

19. What is the typical order-to-delivery time for your (read vehicle type/next)? Select one time frame for each vehicle.

<table>
<thead>
<tr>
<th>Sedans</th>
<th>LD</th>
<th>MD</th>
<th>HD</th>
<th>Tractors</th>
<th>Buses</th>
<th>Time Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ]</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>&lt; 4 weeks</td>
</tr>
<tr>
<td>[ ]</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>4 – 6 weeks</td>
</tr>
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<td>[ ]</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>6 – 8 weeks</td>
</tr>
<tr>
<td>[ ]</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>8 – 10 weeks</td>
</tr>
<tr>
<td>[ ]</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>10 – 12 weeks</td>
</tr>
<tr>
<td>[ ]</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>&gt; 12 weeks</td>
</tr>
</tbody>
</table>

20. How many weeks longer are you willing to wait for your (read vehicle type/next) before looking for another vehicle supplier?

<table>
<thead>
<tr>
<th>Vehicle Type</th>
<th>Time Period (wks.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sedans</td>
<td></td>
</tr>
<tr>
<td>LD Trucks</td>
<td></td>
</tr>
<tr>
<td>MD Trucks</td>
<td></td>
</tr>
<tr>
<td>HD Trucks</td>
<td></td>
</tr>
<tr>
<td>Tractor-Semis</td>
<td></td>
</tr>
<tr>
<td>Buses</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
</tr>
</tbody>
</table>

I would now like to ask you a few questions regarding the fleet vehicles your company owns, **If Q5 has 0% owned, skip to Q23**
21. Do you purchase your new vehicles through a local dealer, national contract or a government contract? **Select all that apply.**

- [ ] Local dealer
- [ ] National contract
- [ ] Government contract

22. How do you finance your purchased vehicles? **Select one.**

- [ ] Internal
- [ ] Bank loan
- [ ] Vehicle manufacturer finance
- [ ] Leased to own

23. Do you have vehicle add-ons, such as power takeoffs, bed storage systems, cherry picker, alternative fuel cells, or crew cabs, installed within your fleet vehicles?

- [ ] Yes
- [ ] No

(“Power takeoff”: “PTO” device used to take power “off” from the engine, and through the transmission, to typically operate hydraulic systems. “Alternate fuel cells”: Cells or tanks added to a vehicle in order for it to consume both alternative fuels and gas or diesel.)

**If yes:** Where do you currently have vehicle add-ons (such as 4-wheel drive, power take-offs, etc.) installed, OEM after-market supplier, factory installed by vehicle manufacturer, local truck after-market shop, or in-house? **Select all that apply.**

- [ ] OEM after-market supplier
- [ ] Factory installed by vehicle manufacturer
- [ ] Local truck after-market shop
- [ ] In-house

**MAINTENANCE & TBA ISSUES**

Next, I would now like to ask you a few questions regarding your fleet maintenance activities and your procurement of after market vehicle parts.

24. What is your most important strategy for containing or lowering the cost of maintenance? **Select one.**

- [ ] On-site maintenance
- [ ] Short vehicle replacement cycle
- [ ] Outsource maintenance
- [ ] Standardize vehicles
- [ ] Short maintenance intervals
- [ ] Other_________________________________________________

25. Using a 10-point scale where 10 is most important, how important is standardizing truck specifications as a cost savings strategy?

_____ Importance rating

26. Using the same 10-point scale, how important is it to the operation of your fleet that you minimize ‘out of service’ time due to maintenance?

_____ Importance rating

27. Is your preventive maintenance performed on your property or at an off-site location?

- [ ] On-site
- [ ] Off-site
- [ ] Both On-site and Off-site
If on-site, do you manage your on-site maintenance yourself?
[ ] Yes
[ ] No

If outsourced or offsite, ask: What is the single most important advantage you receive from your current preventive maintenance provider that other preventive maintenance providers don’t offer? Select one.
[ ] Low cost
[ ] Fast service
[ ] Nothing
[ ] Quality of service
[ ] Relationship with leasing company
[ ] Proximity
[ ] Open 24 hours
[ ] Work is under warranty
[ ] Other_________________________________________________

28. Preventive maintenance can extend vehicle life, reduce overall maintenance cost, and improve in-service levels. What do you consider the most important benefit of preventive maintenance? Select one.
[ ] Longer vehicle life
[ ] Fewer breakdowns
[ ] Other, _____________________________________________

29. What are your preventive maintenance intervals based on, manual check (in route), time frequency, odometer reading/mileage? Select all that apply.
[ ] Manual check (in route)
[ ] Time frequency
[ ] Odometer reading/mileage

30. How many miles do you typically drive on a set of tires on your (read vehicle type/next)?

<table>
<thead>
<tr>
<th>Vehicle Type</th>
<th>Miles/Tire Set</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sedans</td>
<td></td>
</tr>
<tr>
<td>LD Trucks</td>
<td></td>
</tr>
<tr>
<td>MD Trucks</td>
<td></td>
</tr>
<tr>
<td>HD Trucks</td>
<td></td>
</tr>
<tr>
<td>Tractor-Semis</td>
<td></td>
</tr>
<tr>
<td>Buses</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
</tr>
</tbody>
</table>

31. Where do you purchase your new tires? Select all that apply.
[ ] National chain (Autozone, Pep Boys, etc.)
[ ] OEM Vehicle manufacturer (Ford, GM, Mack, etc.)
[ ] OEM Tire manufacturer (purchase directly from Firestone)
[ ] Leasing company
[ ] Third-party service provider (local dealer-like a Michel Tire, truck stop)
ON-SITE FUELING

Next, I would now like to ask you a few questions regarding your fleet refueling activities.

32. Do you fuel any of your vehicles on-site (either using tanks or mobile refueling service) and/or do you fuel any of your vehicles off-site? Select all that apply
   [  ] On-site
   [  ] Off-site

If no on-site skip to Q34.

33. What is the single most important factor in your decision to refuel on-site? Select one.
   [  ] Cost
   [  ] Convenience
   [  ] Control
   [  ] Other, __________________________________________

OFF-SITE FUELING

If no Offsite, skip to Q56.

34. If off-site, ask: Which type of facility do you primarily use when fueling off-site? Do you use retail stations, truck stops, or cardlocks (either unattended or at retail stations)? Select one.
   [  ] Retail stations
   [  ] Truck stops
   [  ] Cardlocks

35. What is the primary reason/factor for selecting (read primary method, e.g. retail stations, truck stops, or cardlocks)? Select one.
   [  ] Convenience
   [  ] Brand/station loyalty
   [  ] Location
   [  ] Price
   [  ] Personal preference
   [  ] Payment method dictates - card
   [  ] Don’t know
   [  ] Government regulations
   [  ] Other ______________________________________

36. If refuel at retail: When you fuel at your primary retail station do you pass other retail stations on the way?
   [  ] Yes
   [  ] No

   If yes: Why don’t you fuel at the closest retail location that you pass? Select one.
   [  ] Don’t take card/program w/ another station
   [  ] Brand loyalty
   [  ] Cost/Price
   [  ] Contract/acct w/ other station
   [  ] Service
   [  ] Other ______________________________________
37. Using a 10-point scale where 10 is most important, how important is it that your retail stations include the following services and amenities? Does your retail station provide that service or amenity? Check if offered.

<table>
<thead>
<tr>
<th>Imp</th>
<th>Offer</th>
<th>Features</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td><strong>Methods of Payment Accepted</strong></td>
</tr>
<tr>
<td></td>
<td>[ ]</td>
<td>Accepts checks</td>
</tr>
<tr>
<td></td>
<td>[ ]</td>
<td>Accepts your fleet/credit card at the pump</td>
</tr>
<tr>
<td></td>
<td>[ ]</td>
<td>Will open a (paper) account for your company</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Vehicle Services</strong></td>
</tr>
<tr>
<td></td>
<td>[ ]</td>
<td>Has truck wash</td>
</tr>
<tr>
<td></td>
<td>[ ]</td>
<td>Has car wash</td>
</tr>
<tr>
<td></td>
<td>[ ]</td>
<td>Offers preventive maintenance services</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Merchandise Offerings</strong></td>
</tr>
<tr>
<td></td>
<td>[ ]</td>
<td>Offers TBA merchandise</td>
</tr>
<tr>
<td></td>
<td>[ ]</td>
<td>Offers C-store items</td>
</tr>
<tr>
<td></td>
<td>[ ]</td>
<td>Offers fast food</td>
</tr>
<tr>
<td></td>
<td>[ ]</td>
<td>Has restaurant-style meal service</td>
</tr>
<tr>
<td></td>
<td>[ ]</td>
<td>Has ATM machine available</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Physical Facility Attributes</strong></td>
</tr>
<tr>
<td></td>
<td>[ ]</td>
<td>Has dedicated fleet islands</td>
</tr>
<tr>
<td></td>
<td>[ ]</td>
<td>Has air and water</td>
</tr>
<tr>
<td></td>
<td>[ ]</td>
<td>Has ample temporary parking space</td>
</tr>
<tr>
<td></td>
<td>[ ]</td>
<td>Is accessible to oversized vehicles</td>
</tr>
<tr>
<td></td>
<td>[ ]</td>
<td>Has 24-hour access</td>
</tr>
<tr>
<td></td>
<td>[ ]</td>
<td>Offers full-service fueling</td>
</tr>
<tr>
<td></td>
<td>[ ]</td>
<td>Offers diesel fuel</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Petroleum Equipment Offerings</strong></td>
</tr>
<tr>
<td></td>
<td>[ ]</td>
<td>Has cardless payment at dispensers</td>
</tr>
<tr>
<td></td>
<td>[ ]</td>
<td>Has cash acceptors</td>
</tr>
</tbody>
</table>

**PAYMENT METHODS**

If fueling on-site only, skip to Q55.

38. How do your methods of payment for fuel break out among credit cards, cash, pre-paid cards, vouchers, driver reimbursement, and on-account?

<table>
<thead>
<tr>
<th>%</th>
<th>Credit Cards (including bank, fleet, oil, ATM, Govt., etc.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td>Cash</td>
</tr>
<tr>
<td>%</td>
<td>Vouchers</td>
</tr>
<tr>
<td>%</td>
<td>On-account</td>
</tr>
<tr>
<td>%</td>
<td>Pre-paid fuel card</td>
</tr>
<tr>
<td>%</td>
<td>Driver reimbursement</td>
</tr>
<tr>
<td>%</td>
<td>Other, __________________________________________________</td>
</tr>
</tbody>
</table>

39. What is the single most important advantage (*read primary payment method*) has over other payment methods? Select one.

[ ] Cost
[ ] Convenience
[ ] Control
[ ] Reporting
[ ] Discounts
[ ] Other, __________________________________________________
40. Can your drivers choose their payment method?

[ ] Yes
[ ] No

41. **If use cards:** Including all ATM, bank, oil, and fleet cards, how many different card programs does your fleet use?

Number of card programs

42. **If currently using more than one card program:** Do you use more than one card program for fuel purposes?

[ ] Yes
[ ] No

**If yes:** Why do you use more than one card program for fuel?  **Select all that apply.**

[ ] Location of the stations
[ ] Different cards for different vehicles/fuel types
[ ] Choose to carry a spare card
[ ] Each subsidiary/division/branch makes own choice of card
[ ] Card program discounts

**If yes:** Would you prefer to use one card program?

[ ] Yes
[ ] No

43. Does your card program dictate the facility you refuel at or did you choose a card program that would be accepted at the facilities you currently use?

[ ] Card program dictates facilities
[ ] Chose program that is accepted at current facilities

44. Are your fleet cards currently assigned, by driver, by vehicle, by a combination of driver and vehicle, or by company card (can be used by all employees)?

[ ] Driver
[ ] Vehicle
[ ] Combination of driver and vehicle
[ ] Company card

45. Do any of your fuel cards offer a loyalty program that enables you to accumulate rewards points toward other purchases?

[ ] Yes
[ ] No

**If yes:** What type of purchases can you apply your points towards?  **Select all that apply.**

[ ] Same brand fuel
[ ] Same brand maintenance
[ ] Same brand C-store items
[ ] Other retailers’ goods accrued to the business
[ ] Other retailers’ goods accrued to the driver
[ ] Other__________________________

46. Should loyalty programs benefit the company, the employee, or both the company and employee?  **Select one.**

[ ] Company
[ ] Employee
[ ] Both
47. Is there a fee for your primary card program?

[ ] Yes
[ ] No

**If yes:** What is your fee based on? How much is your (first fee/next)?

<table>
<thead>
<tr>
<th>Type of Fee</th>
<th>Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Per transaction fee</td>
<td></td>
</tr>
<tr>
<td>Number of cards ($/card)</td>
<td></td>
</tr>
<tr>
<td>Percent of purchases</td>
<td></td>
</tr>
<tr>
<td>Annual fee</td>
<td></td>
</tr>
<tr>
<td>Fixed monthly fee</td>
<td></td>
</tr>
</tbody>
</table>

**If “Number of cards”,** How many cards do you have that are charged a fee based on the number of cards?

_____ Number of cards

48. I would like to read you a list of card features and have you rate the importance of each feature to your business using a 10 point scale where 10 is most important. Does your primary card have this feature?

<table>
<thead>
<tr>
<th>Rating Has</th>
<th>Feature</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Wide acceptance</td>
</tr>
<tr>
<td></td>
<td>In-station or one-station cards</td>
</tr>
<tr>
<td></td>
<td>No card fees</td>
</tr>
<tr>
<td></td>
<td>Ability to purchase non-fuel items such as maintenance and other travel and business expenses</td>
</tr>
<tr>
<td></td>
<td>Security features requiring the driver to enter a PIN or ID number</td>
</tr>
<tr>
<td></td>
<td>Ability to instantly void cards in the event of fraud, misuse, or loss</td>
</tr>
<tr>
<td></td>
<td>Lockout features that restrict the brand, product type (gas/diesel/grade), amount, location, or time the card can be used</td>
</tr>
<tr>
<td></td>
<td>Ability to set different lockout parameters on each card</td>
</tr>
<tr>
<td></td>
<td>Fraud liability protection</td>
</tr>
<tr>
<td></td>
<td>Ability to track expenses by department/project</td>
</tr>
<tr>
<td></td>
<td>Extended payment terms</td>
</tr>
<tr>
<td></td>
<td>High credit limit</td>
</tr>
<tr>
<td></td>
<td>Revolving credit</td>
</tr>
<tr>
<td></td>
<td>Provides enhanced features such as road side assistance</td>
</tr>
<tr>
<td></td>
<td>Loyalty and rewards</td>
</tr>
</tbody>
</table>

My next questions deal with reporting features.

49. Using a 10 point scale with 10 being very important, how important is it that your reports (read first feature/next). Does your primary card have that feature?

<table>
<thead>
<tr>
<th>Rating Has</th>
<th>Feature</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Are available online along with other account management capabilities</td>
</tr>
<tr>
<td></td>
<td>Include IDs to report purchases by driver, vehicle, card number, division or department</td>
</tr>
<tr>
<td></td>
<td>Provide mileage based information such as miles driven and miles per gallon</td>
</tr>
<tr>
<td></td>
<td>Report unauthorized purchases or flags exceptions</td>
</tr>
</tbody>
</table>

50. Would you prefer a summary report or a report with transaction-by-transaction detail?

[ ] Summary report
[ ] Transaction by transaction report
51. Using a 10-point scale where 10 is completely satisfied, how satisfied are you with the reporting features of your card?

_______ Rating

If less than 9: What would your card provider need to do for you to rate the reporting a 10?

[  ] Provide exception reporting
[  ] Provide tax exempt reporting
[  ] Provide online reports
[  ] Offer customizable reporting
[  ] Other ____________________________

52. What is your current billing cycle, monthly, bi-weekly, weekly, daily? Select one.

[  ] Monthly
[  ] Bi-weekly
[  ] Weekly
[  ] Daily
[  ] Other

53. Is that the most convenient billing cycle for you?

[  ] Yes
[  ] No

If No: What billing cycle would you prefer? Select one.

[  ] Monthly
[  ] Bi-weekly
[  ] Weekly
[  ] Daily
[  ] Other

54. Bills can be sent by (read first media/next), how would you like to receive bills? Select all that apply.

[  ] Diskette
[  ] Paper
[  ] On-line access through the Internet
[  ] Direct link (host-to-host link with provider’s mainframe)
[  ] EDI (Electronic Data Interchange)
[  ] Fax
[  ] No bills – pay cash only

55. How long have you been using your primary card program? Select one.

[  ] Less than 6 months
[  ] 6 months to 1 year
[  ] 1 – 2 years
[  ] 2 – 3 years
[  ] 3 – 5 years
[  ] More than 5 years
FLEET ADMINISTRATION ISSUES

Next, I would now like to ask you a few questions regarding how you administer your fleet vehicles.

56. Do your fleet vehicles operate out of multiple locations?
   [ ] Yes
   [ ] No
   **If yes:** Do you make decisions for just this location or for more than one location? **Select one.**
   [ ] This location only
   [ ] More than one location

57. Which of the following fleet related administration decisions are you involved with, vehicle procurement, fueling programs, maintenance programs, driver hiring? **Select all that apply.** Which do you make the final decisions for?

<table>
<thead>
<tr>
<th>Involved</th>
<th>Make Final</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ]</td>
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<td>[ ]</td>
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<td>[ ]</td>
</tr>
</tbody>
</table>

58. Which department/division is responsible for fleet administration? **Select one.**
   [ ] Fleet department
   [ ] General management (Non-departmentalized)
   [ ] Transportation/shipping department
   [ ] Accounting/finance department
   [ ] Vehicle maintenance department
   [ ] Administration/office manager/human resources
   [ ] Operations department
   [ ] Purchasing/procurement department
   [ ] Risk management department
   [ ] Marketing department

59. Do you use the Internet at work for fleet related activities?
   [ ] No, **Skip to Q60**
   [ ] Yes
   **If yes:** You mentioned that you use the Internet at work. What specifically do you use the Internet for? **Select all that apply.**
   [ ] Research vehicle options
   [ ] Order vehicle parts
   [ ] Specify and order vehicles
   [ ] Track inventories of vehicles and/or parts
   [ ] Locate vehicle dealerships
   [ ] Track detailed vehicle maintenance costs
   [ ] Access fueling or maintenance reports
   [ ] Track detailed vehicle fueling costs
   [ ] Billing and invoicing
   [ ] Locate fueling, maintenance, and other service facilities
60. What fleet associations are you a member of? **Select all that apply.**

- [ ] NAFA – National Association of Fleet Administrators
- [ ] ATA – American Trucking Association
- [ ] NVLA – National Vehicle Leasing Association
- [ ] ITLA – International Taxicab and Livery Association
- [ ] NUCA – National Utility Contractors Association
- [ ] TMC – Truck Maintenance Council
- [ ] OPIS – Oil Price Information Service
- [ ] CLM – Council of Logistic Management
- [ ] Other ______________________________

61. What sources of information do you use to keep up to date on the fleet industry? **Select all that apply.**

- [ ] Trade magazine articles
- [ ] Trade shows
- [ ] Vendor’s newsletters
- [ ] Competitors
- [ ] Industry associations
- [ ] Internet

62. I would like to read you a list of services and have you tell me if you outsource management of that service, the first service is (read list/next)? **If no service is outsourced skip to Q67.**

**Outsource**

- [ ] Vehicle procurement
- [ ] Vehicle financing
- [ ] Vehicle remarketing
- [ ] Motor vehicle registration record procurement
- [ ] License renewal
- [ ] Drivers
- [ ] Driver safety training
- [ ] Logistics
- [ ] Fuel management
- [ ] Maintenance
- [ ] Roadside assistance
- [ ] Accident services
- [ ] Management reporting

63. What is the single most important factor in your decision whether or not to outsource a particular service? **Select one.**

- [ ] Cost
- [ ] Convenience
- [ ] No fleet department
- [ ] Capability
- [ ] Other, ______________________________

64. **If outsourcing more than one service, ask:** Are any of those services provided by the same vendor?

- [ ] Yes
- [ ] No
65. **If outsourcing more than one service, ask:** Does your supplier price its services based on a single bundled negotiated contract for all the services provided, on an “a la carte” (per service) basis, or do you have an option to purchase bundled services for one price or a la carte?

[ ] Single bundled for all services  
[ ] A la carte (per service price)  
[ ] Option of bundled or a la carte  

**If no bundled price is offered:** On a scale of 1 to 10 where 10 is very likely, how likely would you be to consider purchasing your services bundled under one price, if you were offered such an arrangement?

_____ Likely rating

**If both bundled and “a la carte” pricing are offered:** Is your arrangement based on bundled pricing or a la carte?

[ ] Bundled  
[ ] A la carte

**If “a la carte”:** What do you consider the benefits of using the “a la carte” price approach? **Select one.**

[ ] Don’t want to be locked into a single source contract  
[ ] Don’t want to give up control of entire fleet operations to one source  
[ ] Cost of bundling is not competitive

**If single bundled price:** What do you consider the benefits of using one single vendor/price approach? **Select all that apply.**

[ ] Happy with all the programs the service provider offers  
[ ] Prefer the control factor of using only one source  
[ ] Less paperwork/ease of use  
[ ] Lower total cost

66. Has total fleet management outsourcing been considered for your company?

[ ] Yes  
[ ] No

**If No:** Why not?

[ ] Cost  
[ ] No need  
[ ] Control  
[ ] Corporate decision  
[ ] Other, ___________________________________________

67. Telematic devices provide two way voice and data communication with your fleet. Can you get telematics devices from the company that supplies your vehicles?

[ ] Yes  
[ ] No

**If no, ask:** Using a 10 point scale where 10 is very likely, how likely would you be to order vehicles with telematic devices if they were made available from your vehicle supplier?

_____ Likely rating
68. Have you ever shopped for telematic devices from an OEM vehicle manufacturer?

[ ] Yes
[ ] No

If Yes: Would you prefer telematics from your vehicle supplier or a third-party telematics supplier or doesn’t it matter? Select one.

[ ] Vehicle supplier
[ ] Third-party supplier
[ ] Doesn’t matter

If Yes: Did you have any telematics needs that weren’t available from the OEM vehicle manufacturer?

[ ] Yes
[ ] No

If Yes: What needs did you have?

[ ] Reporting
[ ] Compatibility with other vehicles
[ ] Other, ________________________________________________

69. What do you see as your top issues for you and your fleet in the coming years? Select all that apply.

[ ] Fuel cost
[ ] Government regulations
[ ] Adoption of new technology
[ ] Mechanic availability
[ ] Driver availability
[ ] Availability of tires
[ ] Insurance cost
[ ] Other, ________________________________________________

ADVANCED VEHICLE TECHNOLOGIES

Next, I would like to ask you a few questions regarding advanced vehicle technologies.

70. Are you directly involved with your organization’s evaluation of advanced vehicle technologies including alternative fuels, fuel cells, electric hybrid, and hydraulic hybrid?

[ ] Yes
[ ] No, Thank respondent and end questionnaire.

71. Has the organization ever evaluated alternative fuels, fuel cells, electric hybrid, or hydraulic hybrid technologies?

[ ] Yes
[ ] No

If Yes: To what degree have you evaluated alternative fuels, fuel cells, electric hybrid, or hydraulic hybrid technologies? Select all that apply.

[ ] Casually browsed industry research articles
[ ] Conducted targeted investigation (trade magazines, Internet, etc.)
[ ] Attended trade conferences on the subject
[ ] Met with potential technology supplier to review applications
[ ] Met with potential technology supplier to discuss a pilot test
[ ] Conducted a pilot test
[ ] Developed policy for adopting technology
72. Has your organization ever implemented alternative fuels, fuel cells, electric hybrid, or hydraulic hybrid technologies?

[ ] Yes
[ ] No

If Yes: How many vehicles are currently equipped with alternative fuels, fuel cells, electric hybrid, hydraulic hybrid technology?

_____ Number of vehicles with alternative fuels
_____ Number of vehicles with fuel cells
_____ Number of vehicles with electric hybrid
_____ Number of vehicles with hydraulic hybrid

73. Are any government requirements pushing you towards one or more of these technologies?

[ ] Yes
[ ] No

If yes: Which requirements? Which technologies?

________________________________________________________________________

74. Are you familiar with any tax incentives offered in your area to encourage the adoption of emission control technology for medium and heavy duty vehicles?

[ ] Yes
[ ] No

If yes: Which technologies qualify for the incentive program: alternative fuels, fuel cells, electric hybrid, and/or hydraulic hybrid? Select all that apply.

[ ] Alternative fuels
[ ] Fuel cells
[ ] Electric hybrid
[ ] Hydraulic hybrid

If yes: Which authority/organization(s) coordinate the incentive program?

________________________________________________________________________

If yes: What are the emission reduction rates that must be met in order to qualify?

________________________________________________________________________

If yes: What are the incentives if you qualify?

________________________________________________________________________
75. If you were to adopt an advanced vehicle technology what would be the single most important benefit you would be looking for? Select one.

- Initial purchase/lease price
- Fuel economy
- Fuel type
- Emissions reduction
- Safety features
- Driver comfort
- Noise reduction
- Tax incentives
- Government regulations
- Low relative maintenance
- Availability of convenient fueling infrastructure
- Technology maintains current levels of vehicle performance
- Ample vehicle availability

76. Many advanced vehicle technologies purport to improve fuel economy but add cost initially to the purchase price. What payback period (in months) would be acceptable in order to move forward with the adoption of a technology?

___ Payback in months

77. Based on your current knowledge, please rank your expected future investments in the adoption of alternative fuels, fuel cells, electric hybrid, hydraulic hybrid technologies, with 1 being the most likely.

___ Alternative fuels
___ Fuel cells
___ Electric hybrid
___ Hydraulic hybrid

78. When considering the implementation of one of these advanced vehicle technologies would you be more likely to retrofit that technology or purchase it on new vehicles, or would both be considered equally?

- Retrofit
- Purchase on new vehicle
- Both considered equally

If retrofit considered: Would you expect to install the retrofit equipment in-house? Or, would you require an authorized third-party dealer install and warranty the equipment? Select one.

- In-house
- Authorized third-party install
- Both considered equally

79. Which types of vehicles would you target for alternative fuels, fuel cells, electric hybrid, hydraulic hybrid? Select all that apply.

- Sedans
- LD
- MD
- HD
- Tractors
If (read first technology/next) was commercially available today, would you consider purchasing this technology? If yes: In what year would you expect to research, pilot, implement (read first selected technology/next)?

<table>
<thead>
<tr>
<th>Purchase</th>
<th>Technology</th>
<th>Research (Year)</th>
<th>Pilot (Year)</th>
<th>Implement (Year)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>Alternative fuels</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>Fuel cells</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>Electric hybrid</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>Hydraulic hybrid</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

That is all the questions I have. Could I send you a report on best fleet management practices after the study is complete? Verify contact information and ask for email address.

Thank Respondent!
INTRODUCTION


The integrity of the primary research conducted for the study lies within the sampling methodology. Sampling methodology is inclusive of a number of steps. These steps are:

- Selecting a sample population, determining sample size.
- Stratifying the sample population to its relative universe so it is representative.
- Calculating projection factors so that the sample may be projected to the universe it is intended to represent.

Finally, the raw data and projected data must both be reviewed to ensure it is statistically significant and not biased by outliers.

<table>
<thead>
<tr>
<th>Sampling Considerations</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Raw Data</strong></td>
</tr>
<tr>
<td>Data collected from the research respondents, prior to projecting it to its relative universe.</td>
</tr>
<tr>
<td><strong>Weights or Projection Factors</strong></td>
</tr>
<tr>
<td>Multipliers used to project the sample data to the population.</td>
</tr>
<tr>
<td><strong>Projected Data</strong></td>
</tr>
<tr>
<td>Raw data projected to the population.</td>
</tr>
<tr>
<td><strong>Outliers</strong></td>
</tr>
<tr>
<td>Respondents whose answers are greater than two standard deviations from the mean of a sample.</td>
</tr>
<tr>
<td><strong>Over-sample</strong></td>
</tr>
<tr>
<td>Additional respondents interviewed beyond sampling quotas to enhance or verify sample data. These respondents were NOT used within the projected data set.</td>
</tr>
</tbody>
</table>

The sampling methodology used for the oversample was consistent with that of the primary sample. Data shown in this section reflects initial core sampling quotas.
METHODOLOGY

Commercial Truck Population By State and Commercial Market Segment

To stratify the sample to region and commercial market segment populations, fleet population data by state was collected from the Vehicle Inventory and Use Survey (VIUS). Government data was collected from the Department of Transportation’s Highway Statistics Annual 2002 and the Federal Motor Vehicle Fleet Report 2002.

Fleet Business Segment Sample

<table>
<thead>
<tr>
<th>Fleet Business Segment Sample</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Agriculture Fleets</strong></td>
</tr>
<tr>
<td>(Ag)</td>
</tr>
<tr>
<td><strong>Construction Fleets</strong></td>
</tr>
<tr>
<td>(Const)</td>
</tr>
<tr>
<td><strong>Government Fleets</strong></td>
</tr>
<tr>
<td>(Govt)</td>
</tr>
<tr>
<td><strong>Long-haul Fleets</strong></td>
</tr>
<tr>
<td>(Lhaul)</td>
</tr>
<tr>
<td><strong>Manufacturing Fleets</strong></td>
</tr>
<tr>
<td>(Mfg)</td>
</tr>
<tr>
<td><strong>Retail Trade Fleets</strong></td>
</tr>
<tr>
<td>(Rtl)</td>
</tr>
<tr>
<td><strong>Service Fleets</strong></td>
</tr>
<tr>
<td>(Srvc)</td>
</tr>
<tr>
<td><strong>Short-haul Fleets</strong></td>
</tr>
<tr>
<td>(Shaul)</td>
</tr>
<tr>
<td><strong>Utility Fleets</strong></td>
</tr>
<tr>
<td>(Utl)</td>
</tr>
<tr>
<td><strong>Wholesale Trade Fleets</strong></td>
</tr>
<tr>
<td>(Whls)</td>
</tr>
</tbody>
</table>
Regional Stratification

### Composition of Each Region

<table>
<thead>
<tr>
<th>Region</th>
<th>Northeast</th>
<th>Southeast</th>
<th>Midwest</th>
<th>Southwest</th>
<th>West</th>
</tr>
</thead>
<tbody>
<tr>
<td>CT</td>
<td>AL</td>
<td>IL</td>
<td>AR</td>
<td>AZ</td>
<td></td>
</tr>
<tr>
<td>DC</td>
<td>FL</td>
<td>IN</td>
<td>CO</td>
<td>CA</td>
<td></td>
</tr>
<tr>
<td>DE</td>
<td>GA</td>
<td>IA</td>
<td>KS</td>
<td>ID</td>
<td></td>
</tr>
<tr>
<td>ME</td>
<td>KY</td>
<td>MI</td>
<td>LA</td>
<td>MT</td>
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<tr>
<td>MD</td>
<td>MS</td>
<td>MN</td>
<td>MO</td>
<td>NV</td>
<td></td>
</tr>
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</tr>
<tr>
<td>NH</td>
<td>SC</td>
<td>ND</td>
<td>OK</td>
<td>UT</td>
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<tr>
<td>NJ</td>
<td>TN</td>
<td>OH</td>
<td>TX</td>
<td>WA</td>
<td></td>
</tr>
<tr>
<td>NY</td>
<td>WI</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PA</td>
<td>RI</td>
<td>NE</td>
<td></td>
<td></td>
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<tr>
<td>VT</td>
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</tr>
<tr>
<td>VA</td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>WV</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Sampling methodology required interviews to be conducted within each business segment and fleet size in each of the five regions. Although a minimum of five attempts were made with each contact from the list, additional interviews needed to be completed with other contacts in order to attain the required number of completed interviews.

Specifically, in the government segment there were limited records in the list source. Therefore, interviews were completed within the region as a whole, and not on a state-by-state basis. This ensures that market data is representative of any geographical differences that may exist at the region level. Quotas were rolled up into regions to insure that the appropriate sample would be interviewed.

### Interview Quotas By Region and Commercial Market Segment

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Northeast</td>
<td>15</td>
<td>27</td>
<td>27</td>
<td>19</td>
<td>19</td>
<td>24</td>
<td>32</td>
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<td>22</td>
<td>34</td>
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<tr>
<td>Southeast</td>
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<td>19</td>
<td>26</td>
<td>25</td>
<td>24</td>
<td>16</td>
<td>21</td>
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<td>28</td>
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<td>23</td>
<td>31</td>
<td>21</td>
<td>17</td>
<td>24</td>
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</tr>
<tr>
<td>West</td>
<td>15</td>
<td>19</td>
<td>21</td>
<td>13</td>
<td>18</td>
<td>21</td>
<td>22</td>
<td>19</td>
<td>19</td>
<td>21</td>
<td>188</td>
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<td>Total</td>
<td>88</td>
<td>108</td>
<td>135</td>
<td>106</td>
<td>104</td>
<td>110</td>
<td>120</td>
<td>110</td>
<td>99</td>
<td>118</td>
<td>1098</td>
</tr>
</tbody>
</table>
INTRODUCTION

The commercial market segmentation used in this research was based on major use categories as stated in the *Vehicle Inventory and Use Survey (VIUS)*. Our research database of businesses with trucking requirements was the list source used for the primary interviews. The respondent list was categorized according to region, business segment (based on 2-digit SIC code\(^1\)) and fleet size (four to nine vehicles, ten to forty-nine vehicles, and fifty or more vehicles). This section includes these sample statistics.

---

\(^1\) Within the short haul and long haul segments, four-digit SIC codes were used to differentiate fleets whose on-highway vehicles typically operate locally versus fleets whose on-highway vehicles operate regionally or nationally.
FLEET BUSINESS SEGMENT SAMPLED

Ten commercial market segments were defined by their respective primary two-digit SIC range. These definitions were as follows:

<table>
<thead>
<tr>
<th>Fleet Business Segment Sampled</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Agriculture Fleets</strong> (Ag)</td>
<td>SIC codes 01-14 and 99 include all fleets of businesses engaged in the primary function of agriculture, forestry, fishing, mining, and non-classifiable establishments.</td>
</tr>
<tr>
<td><strong>Construction Fleets</strong> (Const)</td>
<td>SIC codes 15-17 include all fleets of businesses engaged in the construction and contracting trades.</td>
</tr>
<tr>
<td><strong>Government Fleets</strong> (Govt)</td>
<td>SIC codes 43 and 91-97 include all vehicles operated by the federal, state, county, local, and municipal governments, as well as the United States Postal Service.</td>
</tr>
<tr>
<td><strong>Long-haul Fleets</strong> (Lhaul)</td>
<td>SIC codes 4142, 4213, and 4231 include all fleets operated by companies whose on road vehicles transport persons and/or materials over the interstate, regionally or nationally.</td>
</tr>
<tr>
<td><strong>Manufacturing Fleets</strong> (Mfg)</td>
<td>SIC codes 20-39 include all fleets operated by manufacturing companies.</td>
</tr>
<tr>
<td><strong>Retail Trade Fleets</strong> (Rtl)</td>
<td>SIC codes 52-59 include all fleets of businesses whose primary function is to engage in retail trade.</td>
</tr>
<tr>
<td><strong>Service Fleets</strong> (Srvc)</td>
<td>SIC codes 60-89 include all fleets operated by businesses engaged in the service industry. Auto rental fleets (group 751) are included here, but are analyzed separately.</td>
</tr>
<tr>
<td><strong>Short-haul Fleets</strong> (Shaul)</td>
<td>SIC codes 4111, 4119, 4121, 4131, 4141, 4151, 4173, 4212, 4214-15, 4222, 4225-26, 44 to 47 include all fleets operated by companies whose on road vehicles transport persons and/or materials within a metropolitan area.</td>
</tr>
<tr>
<td><strong>Utility Fleets</strong> (Utl)</td>
<td>SIC codes 48 and 49 include all vehicles operated by utility companies including gas, electric, and telephone companies.</td>
</tr>
<tr>
<td><strong>Wholesale Trade Fleets</strong> (Whls)</td>
<td>SIC codes 50 and 51 include all not-for-hire delivery and distribution vehicles operated by companies whose primary function is wholesale trade.</td>
</tr>
</tbody>
</table>

The core research was stratified so representative interviews could be conducted in each commercial market segment and fleet size bucket for a target of 900 interviews. These stratification statistics are detailed in Appendix C. In addition to the core research sample of 894 interviews, an additional 204 interviews were conducted to obtain additional market data. The number of interviews listed above represents completed interviews which have passed Havill & Company research standards; any interview which did not meet research standards was discarded.
Outliers Defined

Outliers Havill Consultants categorizes an outlier as a response that is more than two standard deviations away from the mean for any question.

The final data files used to compile this report included 894 core research interviews and an over-sample of 204 interviews. Each fleet was coded to its three-digit quota code which encompasses region, segment and fleet size.

AGRICULTURE FLEETS SAMPLED

<table>
<thead>
<tr>
<th>Fleet Size</th>
<th>Core Sampled</th>
<th>Over-Sampled</th>
<th>Ttl Sampled</th>
</tr>
</thead>
<tbody>
<tr>
<td>4-9 Fleet Vehicles</td>
<td>31</td>
<td>1</td>
<td>32</td>
</tr>
<tr>
<td>Northeast</td>
<td>7</td>
<td>0</td>
<td>7</td>
</tr>
<tr>
<td>Southeast</td>
<td>6</td>
<td>0</td>
<td>6</td>
</tr>
<tr>
<td>Midwest</td>
<td>8</td>
<td>0</td>
<td>8</td>
</tr>
<tr>
<td>Southwest</td>
<td>6</td>
<td>1</td>
<td>7</td>
</tr>
<tr>
<td>West</td>
<td>4</td>
<td>0</td>
<td>4</td>
</tr>
<tr>
<td>10-49 Fleet Vehicles</td>
<td>29</td>
<td>1</td>
<td>30</td>
</tr>
<tr>
<td>Northeast</td>
<td>5</td>
<td>0</td>
<td>5</td>
</tr>
<tr>
<td>Southeast</td>
<td>3</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td>Midwest</td>
<td>6</td>
<td>1</td>
<td>7</td>
</tr>
<tr>
<td>Southwest</td>
<td>7</td>
<td>0</td>
<td>7</td>
</tr>
<tr>
<td>West</td>
<td>8</td>
<td>0</td>
<td>8</td>
</tr>
<tr>
<td>50+ Fleet Vehicles</td>
<td>20</td>
<td>6</td>
<td>26</td>
</tr>
<tr>
<td>Northeast</td>
<td>3</td>
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</tr>
<tr>
<td>Southeast</td>
<td>3</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td>Midwest</td>
<td>5</td>
<td>1</td>
<td>6</td>
</tr>
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<td>Southwest</td>
<td>6</td>
<td>5</td>
<td>11</td>
</tr>
<tr>
<td>West</td>
<td>3</td>
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<td>3</td>
</tr>
<tr>
<td>Total</td>
<td>80</td>
<td>8</td>
<td>88</td>
</tr>
</tbody>
</table>
## Construction Fleets Sampled

*(Base = Respondents in the Construction Business Segment)*

<table>
<thead>
<tr>
<th>Fleet Size</th>
<th>Core Sampled</th>
<th>Over-Sampled</th>
<th>Ttl Sampled</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>4-9 Fleet Vehicles</strong></td>
<td>26</td>
<td>5</td>
<td>31</td>
</tr>
<tr>
<td>Northeast</td>
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<td>1</td>
<td>4</td>
</tr>
<tr>
<td>Southeast</td>
<td>6</td>
<td>1</td>
<td>7</td>
</tr>
<tr>
<td>Midwest</td>
<td>4</td>
<td>1</td>
<td>5</td>
</tr>
<tr>
<td>Southwest</td>
<td>8</td>
<td>2</td>
<td>10</td>
</tr>
<tr>
<td>West</td>
<td>5</td>
<td>0</td>
<td>5</td>
</tr>
<tr>
<td><strong>10-49 Fleet Vehicles</strong></td>
<td><strong>34</strong></td>
<td><strong>10</strong></td>
<td><strong>44</strong></td>
</tr>
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<td>3</td>
<td>14</td>
</tr>
<tr>
<td>Southeast</td>
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<td>1</td>
<td>8</td>
</tr>
<tr>
<td>Midwest</td>
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</tr>
<tr>
<td>Southwest</td>
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</tr>
<tr>
<td>West</td>
<td>5</td>
<td>3</td>
<td>8</td>
</tr>
<tr>
<td><strong>50+ Fleet Vehicles</strong></td>
<td><strong>28</strong></td>
<td><strong>5</strong></td>
<td><strong>33</strong></td>
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<tr>
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</tr>
<tr>
<td>Southeast</td>
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</tr>
<tr>
<td>Midwest</td>
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</tr>
<tr>
<td>Southwest</td>
<td>7</td>
<td>1</td>
<td>8</td>
</tr>
<tr>
<td>West</td>
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<td><strong>Total</strong></td>
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<td><strong>20</strong></td>
<td><strong>108</strong></td>
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</table>
GOVERNMENT FLEETS SAMPLED

<table>
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<th>Over-Sampled</th>
<th>Ttl Sampled</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>4-9 Fleet Vehicles</strong></td>
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<td>4</td>
</tr>
<tr>
<td>Southeast</td>
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</tr>
<tr>
<td>Midwest</td>
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<td>0</td>
<td>5</td>
</tr>
<tr>
<td>West</td>
<td>1</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td><strong>10-49 Fleet Vehicles</strong></td>
<td>34</td>
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<td>38</td>
</tr>
<tr>
<td>Northeast</td>
<td>9</td>
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</tr>
<tr>
<td>Southeast</td>
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<td>Midwest</td>
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<td>3</td>
<td>13</td>
</tr>
<tr>
<td>Southwest</td>
<td>9</td>
<td>1</td>
<td>10</td>
</tr>
<tr>
<td>West</td>
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<td>0</td>
<td>2</td>
</tr>
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<td><strong>50+ Fleet Vehicles</strong></td>
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</tr>
<tr>
<td>Southeast</td>
<td>16</td>
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<td>21</td>
</tr>
<tr>
<td>Midwest</td>
<td>7</td>
<td>5</td>
<td>12</td>
</tr>
<tr>
<td>Southwest</td>
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<td>3</td>
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# Long Haul Fleets Sampled

Long Haul Fleets  
(Base = Respondents in the Long Haul Business Segment)

<table>
<thead>
<tr>
<th>Fleet Size</th>
<th>Core Sampled</th>
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</tr>
</thead>
<tbody>
<tr>
<td>4-9 Fleet Vehicles</td>
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### MANUFACTURING FLEETS SAMPLED

Manufacturing Fleets  
(Base = Respondents in the Manufacturing Business Segment)

<table>
<thead>
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<th>Core Sampled</th>
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<th>Total Sampled</th>
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<tr>
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<tr>
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<td>6</td>
</tr>
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<td>7</td>
</tr>
<tr>
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<td><strong>19</strong></td>
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### Retail Fleets Sampled

Retail Fleets

(Base = Respondents in the Retail Business Segment)

<table>
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<th>Over-Sampled</th>
<th>Ttl Sampled</th>
</tr>
</thead>
<tbody>
<tr>
<td>4-9 Fleet Vehicles</td>
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<td>7</td>
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<td>Southeast</td>
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<td>7</td>
</tr>
<tr>
<td>Midwest</td>
<td>5</td>
<td>0</td>
<td>5</td>
</tr>
<tr>
<td>Southwest</td>
<td>6</td>
<td>6</td>
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</tr>
<tr>
<td>West</td>
<td>6</td>
<td>0</td>
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</tr>
<tr>
<td>10-49 Fleet Vehicles</td>
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<tr>
<td>Southeast</td>
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<td>0</td>
<td>6</td>
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<tr>
<td>Midwest</td>
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<tr>
<td>Southwest</td>
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<td>1</td>
<td>6</td>
</tr>
<tr>
<td>West</td>
<td>7</td>
<td>1</td>
<td>8</td>
</tr>
<tr>
<td>50+ Fleet Vehicles</td>
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</tr>
<tr>
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<td>2</td>
<td>7</td>
</tr>
<tr>
<td><strong>Total</strong></td>
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<td><strong>110</strong></td>
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## Service Fleets Sampled

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<th>Ttl Sampled</th>
</tr>
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<tr>
<td>Southeast</td>
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<td>8</td>
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<td>Midwest</td>
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<td>1</td>
<td>6</td>
</tr>
<tr>
<td>Southwest</td>
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</tr>
<tr>
<td>West</td>
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<td>1</td>
<td>5</td>
</tr>
<tr>
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<tr>
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<td>2</td>
<td>8</td>
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<tr>
<td>50+ Fleet Vehicles</td>
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<tr>
<td>Southwest</td>
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</tr>
<tr>
<td>West</td>
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<td>9</td>
</tr>
<tr>
<td><strong>Total</strong></td>
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<td><strong>27</strong></td>
<td><strong>120</strong></td>
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</table>
## Short Haul Fleets Sampled

(Base = Respondents in the Short Haul Business Segment)

<table>
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<th>Over-Sampled</th>
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<td>6</td>
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<td>Southeast</td>
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<td>3</td>
</tr>
<tr>
<td>Midwest</td>
<td>5</td>
<td>1</td>
<td>6</td>
</tr>
<tr>
<td>Southwest</td>
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<td>1</td>
<td>7</td>
</tr>
<tr>
<td>West</td>
<td>5</td>
<td>0</td>
<td>5</td>
</tr>
<tr>
<td><strong>10-49 Fleet Vehicles</strong></td>
<td>33</td>
<td>6</td>
<td>39</td>
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<tr>
<td>Northeast</td>
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<td>4</td>
<td>10</td>
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<tr>
<td>Southeast</td>
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<td>8</td>
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<tr>
<td>Midwest</td>
<td>7</td>
<td>0</td>
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<tr>
<td>Southwest</td>
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<td>6</td>
</tr>
<tr>
<td>West</td>
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<td>8</td>
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<tr>
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<td>8</td>
<td>15</td>
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<tr>
<td>West</td>
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<tr>
<td><strong>Total</strong></td>
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<td>26</td>
<td>110</td>
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</table>
## Utility Fleets Sampled

Utility Fleets  
(Base = Respondents in the Utility Business Segment)

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<th>Over-Sampled</th>
<th>Ttl Sampled</th>
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<td>4-9 Fleet Vehicles</td>
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<tr>
<td>Southwest</td>
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<td>5</td>
</tr>
<tr>
<td>West</td>
<td>4</td>
<td>1</td>
<td>5</td>
</tr>
<tr>
<td>10-49 Fleet Vehicles</td>
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<tr>
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<tr>
<td>50+ Fleet Vehicles</td>
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<tr>
<td>West</td>
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<td>2</td>
<td>6</td>
</tr>
<tr>
<td><strong>Total</strong></td>
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<td><strong>15</strong></td>
<td><strong>99</strong></td>
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</table>
### Wholesale Fleets Sampled

(Selected attributes of Wholesale Fleets, where respondents are sampled from the Wholesale Business Segment)

<table>
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<th>Core Sampled</th>
<th>Over-Sampled</th>
<th>Ttl Sampled</th>
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<tbody>
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<td>4-9 Fleet Vehicles</td>
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<td>Midwest</td>
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<td>4</td>
</tr>
<tr>
<td>Southwest</td>
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<td>7</td>
</tr>
<tr>
<td>West</td>
<td>10</td>
<td>2</td>
<td>12</td>
</tr>
<tr>
<td>10-49 Fleet Vehicles</td>
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<td>39</td>
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<td>14</td>
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</tr>
<tr>
<td>West</td>
<td>5</td>
<td>1</td>
<td>6</td>
</tr>
<tr>
<td>50+ Fleet Vehicles</td>
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<tr>
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</tr>
<tr>
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<td>3</td>
</tr>
<tr>
<td><strong>Total</strong></td>
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<td><strong>26</strong></td>
<td><strong>118</strong></td>
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</table>
PURCHASE AGREEMENT

This agreement is a contract to subscribe to *The U.S. Commercial Fleet Market Forecast: 2004-2008* as described in this conspectus, which the undersigned acknowledges having received and read. To enroll, please complete and sign this agreement, and return to: Havill & Company, Inc., 3178 N. Republic Blvd., Suite 1, Toledo, OH 43615. The following terms formalize this agreement between Havill & Company, Inc. ("Havill"), and the undersigned participating company (the "Subscriber"), who hereby agree as follows:

1. Havill shall provide to the Subscriber three (3) copies of *The U.S. Commercial Fleet Market Forecast: 2004-2008* report pursuant to the terms and conditions set forth in this agreement.
2. In exchange for the reports to be provided by Havill, the Subscriber shall pay Havill the Subscription Fee specified in item 3 below.
   
a. All services to be rendered by Havill pursuant to this agreement are conditional upon adequate funding from participating Subscribers. Havill reserves the right to abandon the project and terminate all of its obligations under this agreement by written notice to the Subscriber if Havill is not fully funded. In that case, the Subscriber's deposit will be returned and the project will be canceled. At its discretion, Havill may proceed even if the program is not fully subscribed.
   
b. The market research survey deliverables will be determined by Havill. Charter subscribers will be given the opportunity to review the survey questionnaires and suggest questions for inclusion in the study, so long as the scope of the research is not significantly expanded. Issues and questions put forth in this prospectus are for illustration purposes only and may not be included in the final report if Havill determines there is a lack of subscriber interest.
   
c. The research database deliverables will be determined by Havill. No claims are made on the accuracy or completeness of the data. Access to the database may be terminated at any time by Havill, but will not be granted beyond June 1, 2006 without a separate contract.
3. The Subscription Fee for corporations, partnerships, and sole proprietors submitting signed contracts is shown in the table below. One half of the subscription fee is due along with the signed contract with the balance payable upon completion of the research. Separate business units focusing on specifically distinct products and services but held by a common parent company must subscribe separately. A $3,000 discount will be applied to the subscription fee when there are multiple subscribers from organizations with the same parent. This discount will be applied to the final payment.

<table>
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<th>Subscription Fee</th>
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<th>Post-Publication</th>
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<td>One Survey</td>
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<td>Remaining Two Surveys</td>
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<td>$4,500</td>
</tr>
<tr>
<td>Presentation, State &amp; MSA Analysis, Research Database, which includes downloading up to 20,000 prospect records</td>
<td>$3,000</td>
<td>$4,000</td>
</tr>
<tr>
<td>FleetLeads access to the research database of 860,000 prospect records by subscriber and channel partners</td>
<td>$4,500</td>
<td>$100 - $360 per thousand</td>
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</tbody>
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4. Invoices are due and payable upon receipt. A finance charge of 1.5% per month will be assessed on any unpaid balance after deduction of current payments, credits, and allowances made within 30 days of date of billing. This is an Annual Percentage Rate (APR) of 18%.
5. The term of the research provided pursuant to this agreement shall be for a period beginning upon the date of execution of this agreement and ending upon completion of the project. Havill may terminate its obligations under this agreement prior to December 31, 2006, if the Subscriber does not comply with the terms or conditions of this agreement.
6. The Subscriber hereby consents to the use by Havill of all data and information furnished to Havill by the Subscriber, and represents and agrees that all such data and information will be valid and accurate.
7. Havill draws on information and analysis believed to be reliable. However, neither Havill nor individuals credited with authorship or support can guarantee accuracy or completeness, or be liable for possible errors of fact or judgment. The Subscriber hereby releases and waives any and all claims it may have against Havill their respective directors, members, shareholders, officers, employees, agents, and representatives (collectively, "Representatives") from any and all claims, liabilities, or damages resulting from the use of information or data or services provided by Havill. The Subscriber may only use the data or information provided by Havill within the subscriber's company, but such information shall not be used or relied upon as the exclusive basis for evaluating sales and marketing.
decisions. IN NO EVENT WILL HAVILL OR ITS REPRESENTATIVES BE LIABLE FOR ANY DIRECT, INDIRECT, SPECIAL, INCIDENTAL, CONSEQUENTIAL, OR EXEMPLARY DAMAGES ARISING DIRECTLY OR INDIRECTLY OUT OF THE USE OF, OR INABILITY TO USE, HAVILL INFORMATION OR SERVICES. If any of the limitations on liability of Havill or the Subscribers affiliated therewith or their Representatives contained in this agreement are found to be invalid or unenforceable for any reason by a court of competent jurisdiction, the Subscriber agrees that the maximum liability of Havill and its affiliated Subscribers or their Representatives shall not, in the aggregate, be greater than the enrollment price of the study paid by the Subscriber.

8. The Subscriber acknowledges and agrees that Havill is the owner of all rights, titles, and interests in and to Havill research, its database and information, including without limitation, all patent, copyright, trademark, service mark, trade secret, and trade name rights in and to the foregoing. The Subscriber shall not disclose to anyone, or permit anyone access to, Havill data, information, or programs. The Subscriber agrees that any breach of this paragraph would cause Havill irreparable injury, and that upon any breach or attempted breach of this paragraph, Havill shall have the right to injunctive relief in addition to any other remedies at law or equity.

9. This agreement shall be governed by Ohio law. Each party hereby designates the Court of Common Pleas of Lucas County, Ohio, as the court of proper jurisdiction and venue of and for any and all lawsuits or other legal proceedings relating to this agreement and hereby irrevocably consent to such designation, jurisdiction, and venue; and hereby waive any objections or defenses relating to jurisdiction or venue with respect to any lawsuit or other legal proceeding initiated in the Court of Common Pleas of Lucas County, Ohio.

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Please send a check payable to the Havill & Company, Inc., and return this signed agreement by fax or mail.

Accepted for:

Date: _______________________________ Date: _______________________________
Name (Sign): ________________________ Name (Sign): _________________________
Name (Print): ________________________ Name (Print): _________________________
Title: _______________________________ Title: _______________________________
Address: ___________________________ Address: 3178 N. Republic Blvd.
C/S/Z: ______________________________ C/S/Z: Toledo, OH 43606
Telephone: ___________________________ Telephone: (419) 841-2244
FAX: _______________________________ FAX: (419) 841-2211
Email: ______________________________ Email: jzohn@havillconsultants.com