

Fleet Management 2021

Development and Changes in Fleet Management

September 2021

Fleet Management 2021

Study Contents

Module 1 – Market Analysis True Fleets

- Car parc by segments and vehicle age
- New PC registrations by brand, model and powertrain

Module 2 – Fleet Management

- Fleet Manager – qualification and tasks
- Vehicle purchase – processing, main criteria in the choice of vehicle, etc.
- Cost monitoring, TCO and optimizations incl. Analysis of combustion engines vs. alternative powertrains
- Importance, usage and functionalities of fleet management systems
- Car Policy – restrictions on brands, segments and prices as well as changes in recent years

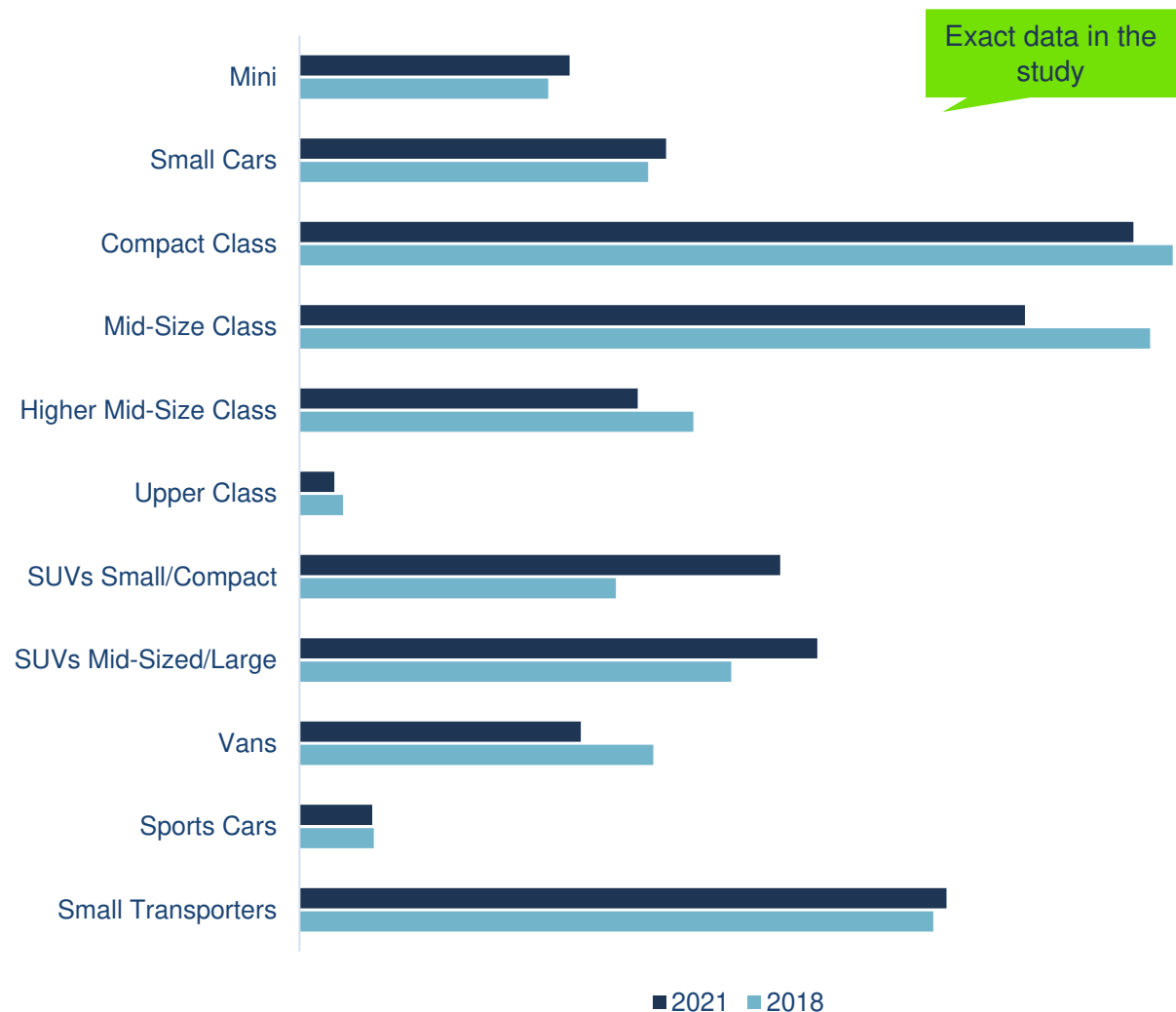
Module 3 – Green Fleet

- Measures to reduce CO2 emission
- Alternative Mobility – company car waiver, forms of deferred compensation, company bicycles, booking of business trips, car subscriptions



Fleet Management 2021: Excerpt form Module 1

Distribution of PCs in **car parc** of True Fleets by **vehicle segments**



- Compact and mid-size class are still most common in the True Fleets market
- However, SUVs were able to show the largest market share gains in both size classes over the last 3 years; following models benefited most in 2021:

Model	Market Share SUV Segment	Change in % Points*	Development*
	3.9%	+0.7%	+33%
	2.1%	+0.5%	+47%
VW T-Roc	2.0%	+0.5%	+48%
	1.1%	+0.4%	+65%
	0.7%	+0.4%	+171%

* 2021 vs. 2020

Fleet Management 2021: Excerpt from Module 2

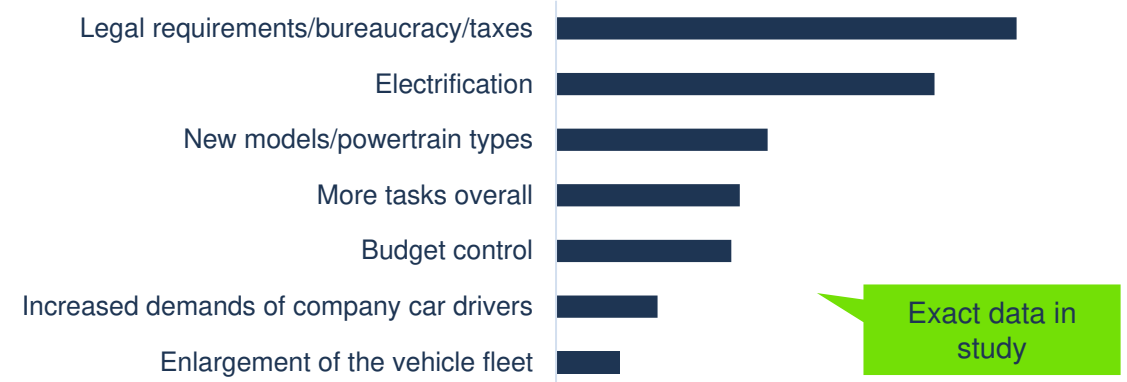
"The tasks for fleet managers have become more complex and extensive in recent years" - Please indicate to what extent you agree with this statement. Why has the work as a fleet manager become more demanding?








of respondents state that the **tasks** for fleet managers have become **more complex and extensive** in recent years..

In large fleets, as many as **89%** of fleet managers are of this opinion.

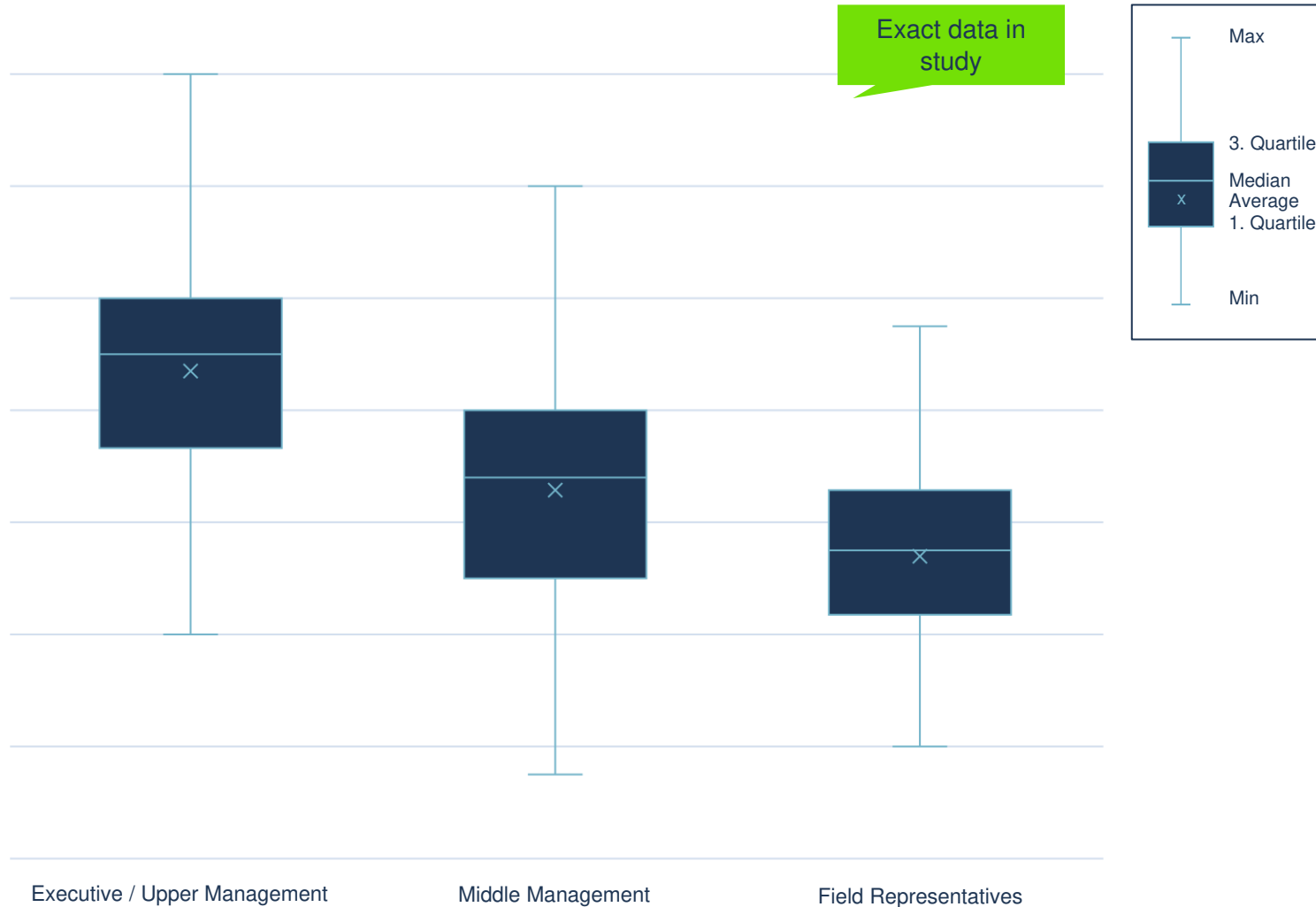
Why has the work become more demanding?



-  "Legal issues like driver's license checks involve a lot of work, and most importantly, a lot of responsibility."
-  "Extensive vehicle and powertrain selection and corresponding allocation to the respective user behavior."
-  "Changes in vendor model ranges, different delivery times depending on the model, and comparability becomes more difficult because of the different packages vendors offer."
-  "Cost/benefit balance must be more in focus. Life cycle assessment, resale value, all this has to be taken into account at the time of purchase."
-  "In addition to the usual issues such as cost and vehicle selection, other issues such as CO2, new powertrains, range and charging options will be added in the future."

Fleet Management 2021: Excerpt from Module 2

Which leasing rates may not be exceeded by the respective hierarchy levels?

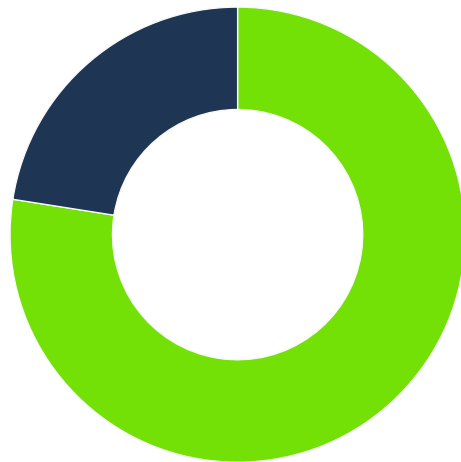


- In 21% of the companies there is no restriction for the executive management regarding leasing rate
- Detailed information on the limitation of leasing rates and also gross list prices per hierarchy level is available in our study.

Fleet Management 2021: Excerpt from Module 3

Do you plan to reduce the CO2 emissions of your fleet in the long term? Is there a bonus/malus system regarding CO2 emissions?
"More emphasis is placed on reducing CO2 emissions in our fleet than on reducing costs." - Please indicate to what extent you agree with this statement.

Planned reduction of CO₂ emission



■ Yes

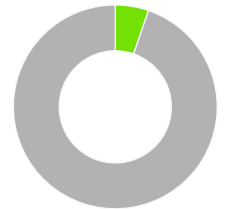
■ No

Exact data in study

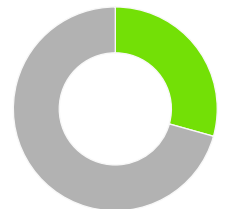


Even though many companies are planning to reduce CO2 emissions in the long term, there is currently no focus on this in practice.

For example, only **x%** of the companies with a Car Policy have a **bonus/malus system** regarding CO2 emissions.



And in **x%** of companies, **costs** are still **more important than** reducing **CO2 emissions**.



Fleet Management 2021: Content and Cost Overview

Or order directly online [here](#)

Dataforce Study: Fleet Management 2021			
	1	2	3
Module	Market Analysis True Fleets	Fleet Management	Green Fleet
Data	Car Parc & Registrations	Fleet Manager Survey	Fleet Manager Survey
Content	PC Parc & New Registrations	Vehicle Purchase, TCO, Fleet Management Systems, Car Policy	Reduction of CO2 emissions & Alternative Mobility
Single Purchase	€ 2,950		€ 1,100
Overall Study	€ 3,950		

Fleet Management 2021: Order Form

Or order directly online [here](#)

- Module 1 + 2:** Market Analysis + Fleet Management (€ 2,950 net)
- Module 3:** Green Fleet (€ 1,100 net)
- Overall Study:** Market Analysis + Fleet Management + Green Fleet (€ 3,950 net)

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