



Market survey on fleet managers' purchase behaviour

Research report by GiPA

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Report content

1

Objectives

2

Methodology

3

Research results

Objectives

- Transport & Environment wishes to undertake research to ascertain the following issue :

understand the buying behaviour of fleet managers of small and medium sized enterprises

- assessing what kind of information is lacking*
 - how its better availability could increase market transparency, better informed choices and competition in particular on fuel efficiency.*
- The objective of the research is to make the case for open access to VECTO and its input values (*EU is preparing a standardised fuel economy test for trucks. The test is based on a simulation software tool that translates input from the truck manufacturers into fuel efficiency figures for different vehicle types. The whole test and simulation is standardised and will give all new trucks a type approval fuel efficiency value*).



Methodology



Target

Small and medium sized fleets
25% operators with 1 truck
75% operators with 1-10 trucks
Having purchased a truck



Methodology

8 mn, telephone interviews.






The total is an unweighted average of all countries.



Timing

Data collected from April to May 2015

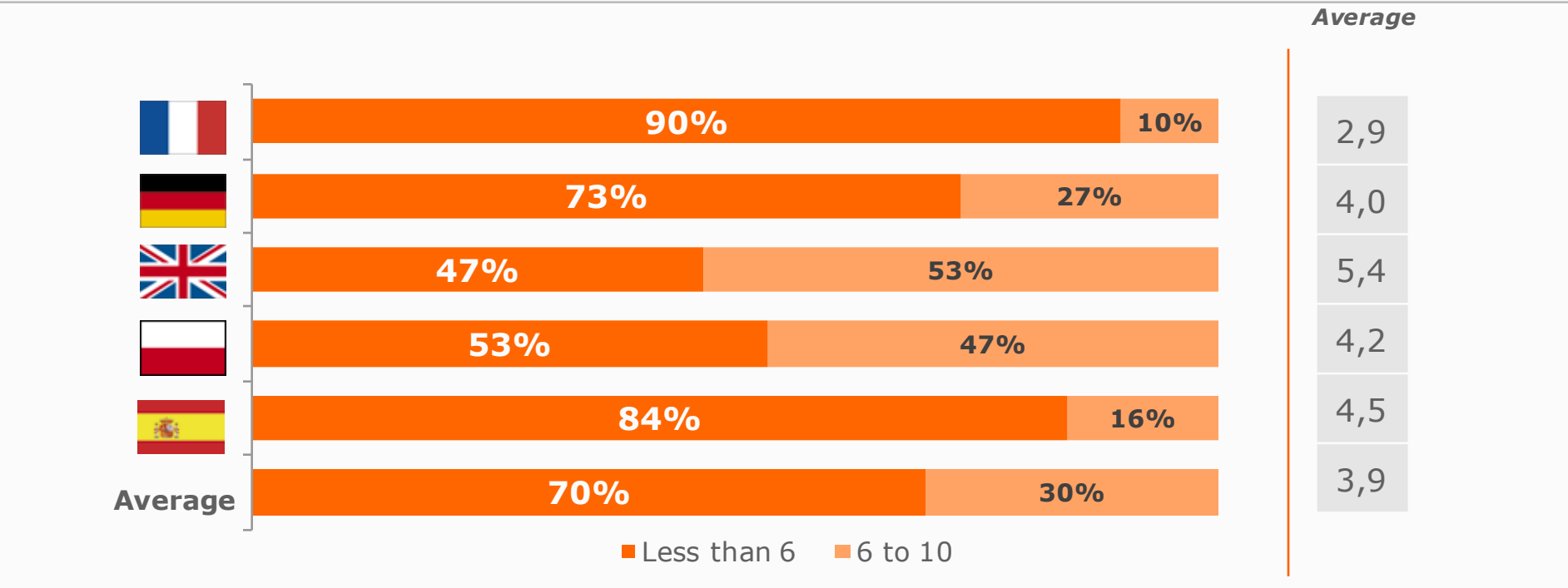


	France	30
	Germany	30
	Great Britain	30
	Poland	30
	Spain	32
Total		152



Sample Profile – Number of vehicles

In France 90% of the respondent declared to have less than 6 vehicles.



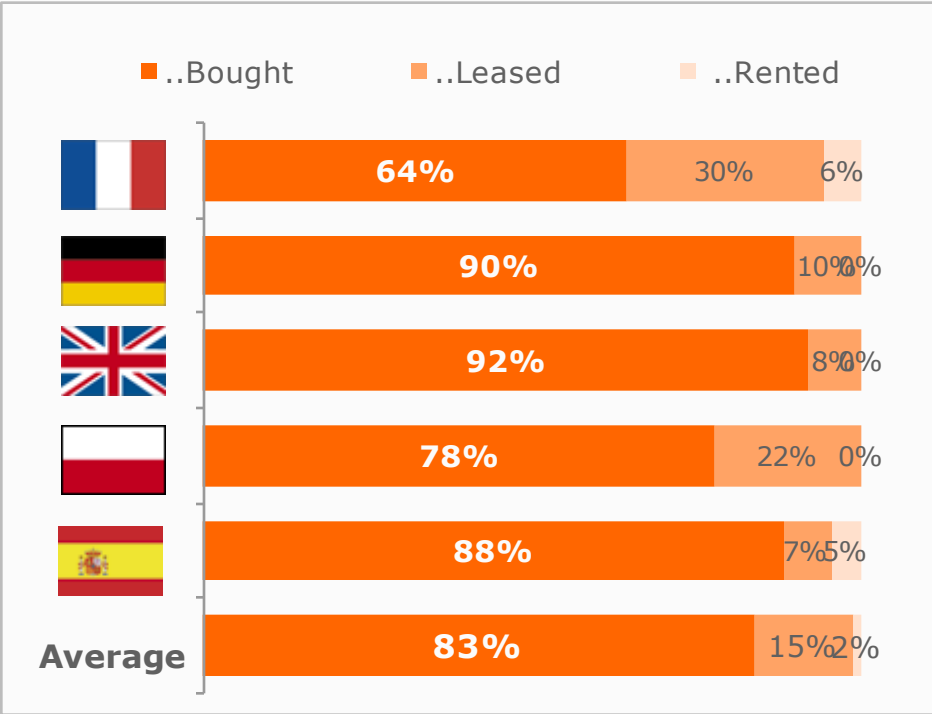
How many trucks/lorries do you have? (segments)



Sample Profile – type of route used and type of ownership

In France 63% of the respondents declared they do use their trucks on the motorways for long distance. 64% of their vehicles are owned 6% rented and 30% leased.

	Longue distance: motorway	National roads	Urban traffic	Off road
	63%	90%	10%	3%
	83%	77%	70%	0%
	73%	87%	37%	0%
	97%	80%	17%	33%
	75%	59%	31%	16%
Average	60%	78%	35%	5%



Which type of route do you generally use?

How many of your trucks are...?

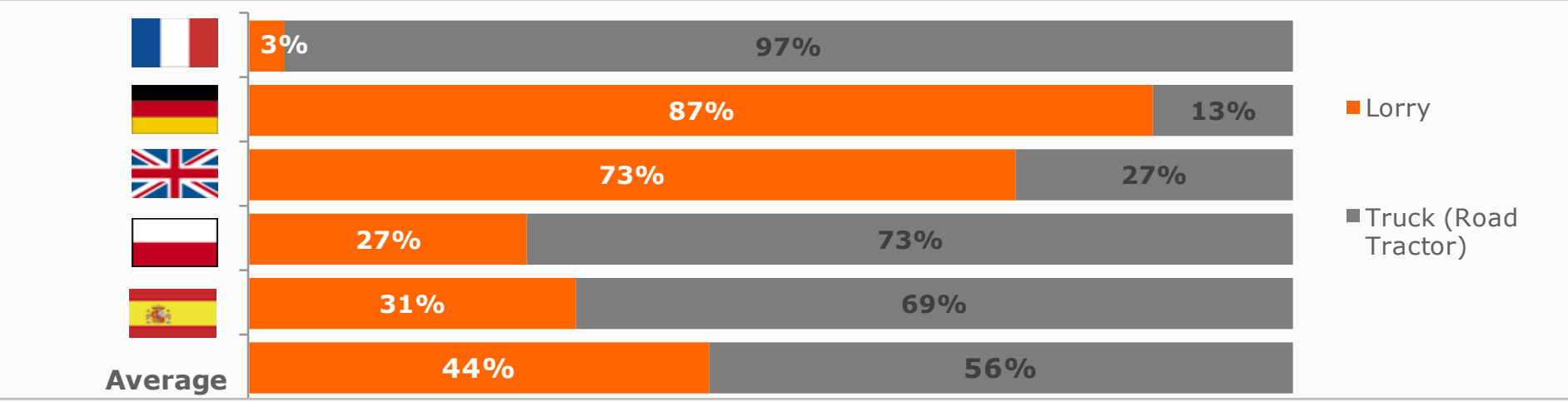


Last vehicle purchase

3% of the French sample have purchased their last vehicle in 2007. 97% have purchased a road tractor.

- Most of last purchases were done in 2013/2014.

	In which year did you purchase your last truck/lorry?									
	2007	2008	2009	2010	2011	2012	2013	2014	2015	
France	3%	0%	3%	3%	13%	10%	23%	37%	7%	
Germany	0%	3%	3%	3%	7%	20%	17%	33%	13%	
Great Britain	0%	0%	3%	3%	3%	20%	7%	30%	33%	
Poland	10%	7%	7%	17%	0%	20%	17%	23%	0%	
Spain	13%	13%	3%	9%	9%	9%	16%	22%	6%	
Average	5%	5%	4%	7%	7%	16%	16%	29%	12%	



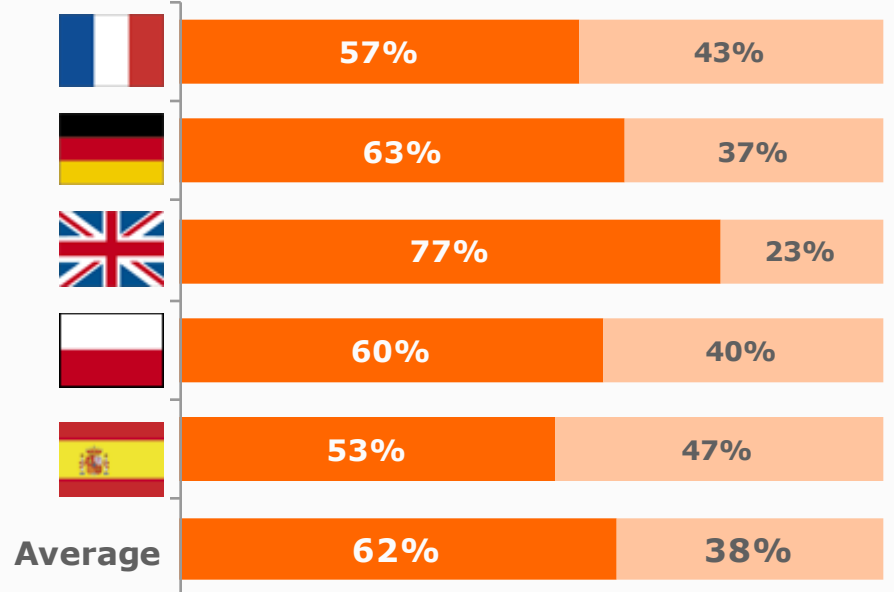


Loyalty to brand

57 % of the French sample stated they purchased the same brand as the replaced vehicle. 27% stated they already have changed a brand due to bad experience.

- Quite half of the German & Polish interviewed truck owners had never changed a brand.

■ Same brand as the vehicle it replaced
■ Not the same brand as the vehicle it replaced
■ The vehicle was added, it did not replace other vehicle



	Yes, the new brand offered much better fuel efficiency	Yes after a bad experience with a previous brand	No	Other
France	3%	27%	27%	43%
Germany	3%	7%	43%	47%
UK	20%	13%	37%	30%
Poland	13%	10%	47%	30%
Spain	22%	3%	31%	44%
Average	13%	12%	37%	39%

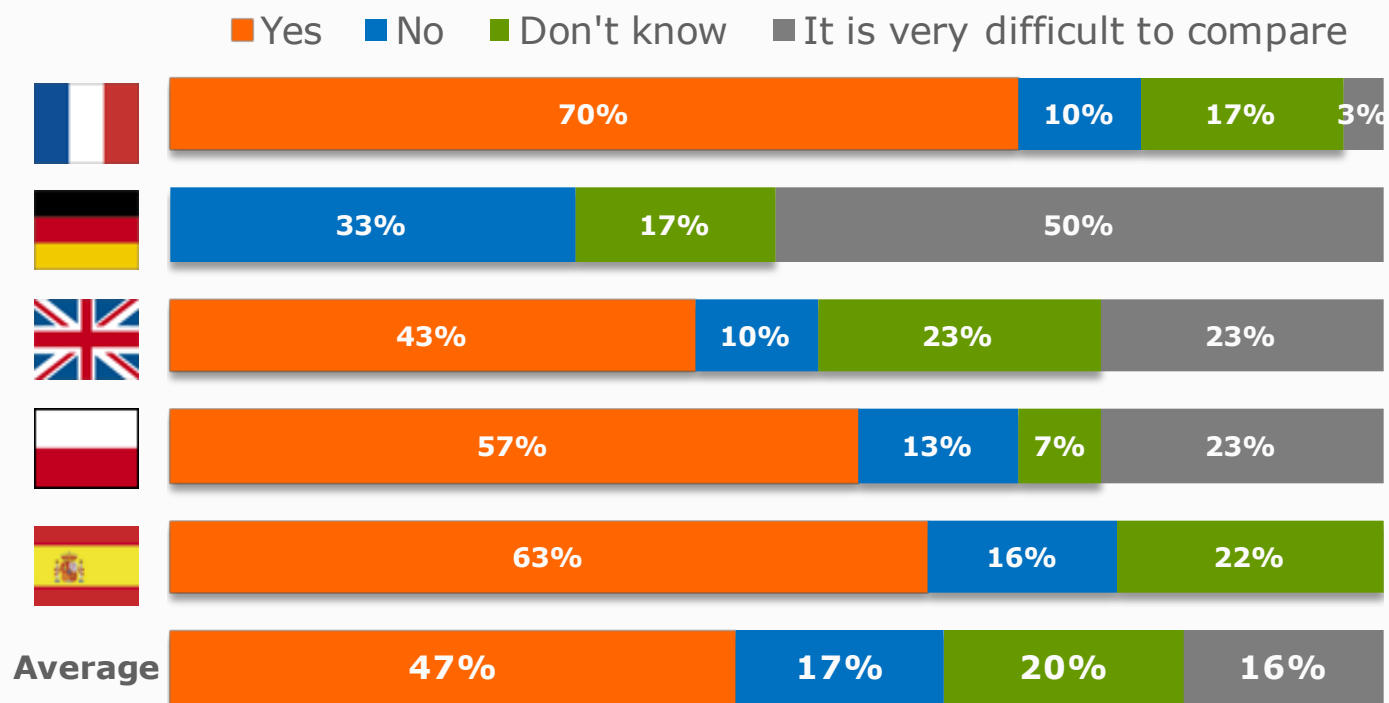
The last vehicle you bought, was it ?

Have you ever changed brand?

Opinion regarding truck manufacturers fuel economy

70% of the French sample estimate that the truck manufacturers exaggerate the fuel economy of their vehicles

- The majority of the French, Spanish, Polish interviewed truck owners do not trust the truck manufacturers on their fuel economy statement.
- Most of Germans do not have an opinion on this issue.
- 43% of the British do not trust the truck manufacturers on this.



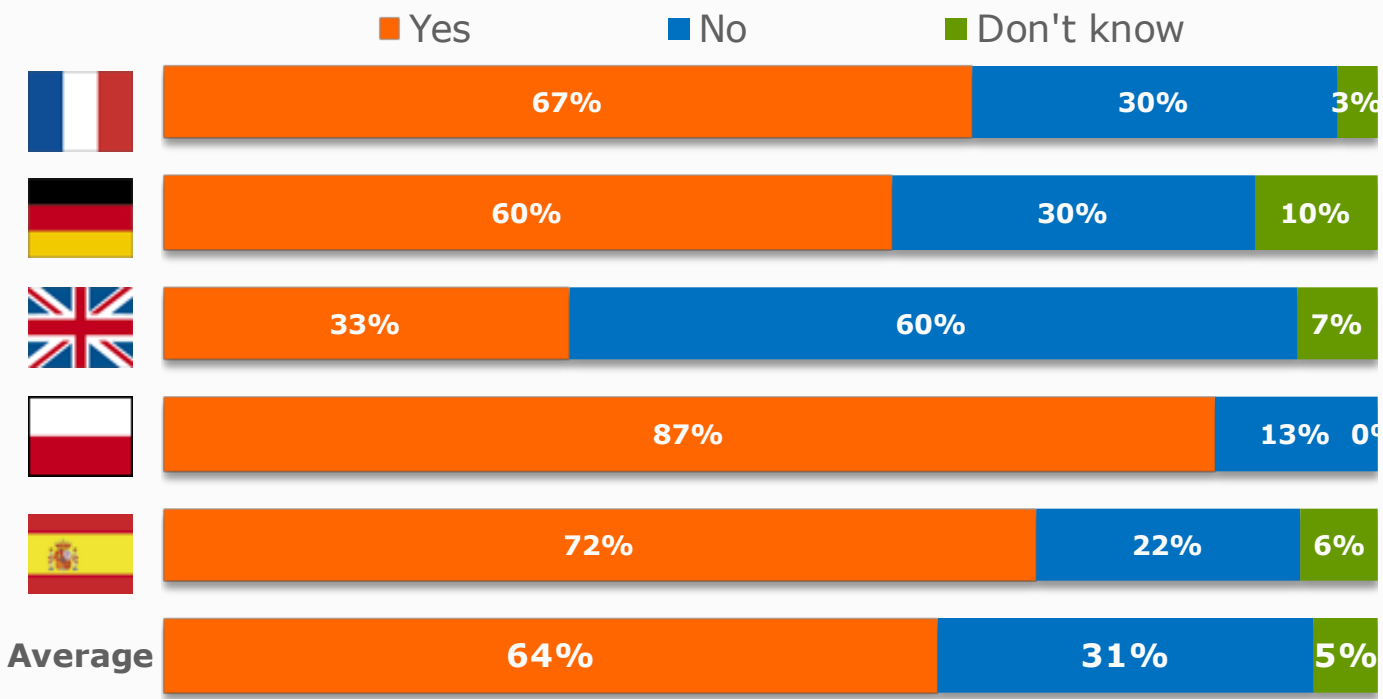
Do you feel truck manufacturers exaggerate the fuel economy of their vehicles?



Opinion regarding truck manufacturers fuel economy

67% of the French sample estimate that differences in fuel economy between new trucks from different brands are very significant

- Except British, the majority of the interviewed truck owners think that there are significant differences in fuel economy between the new trucks of different brands.



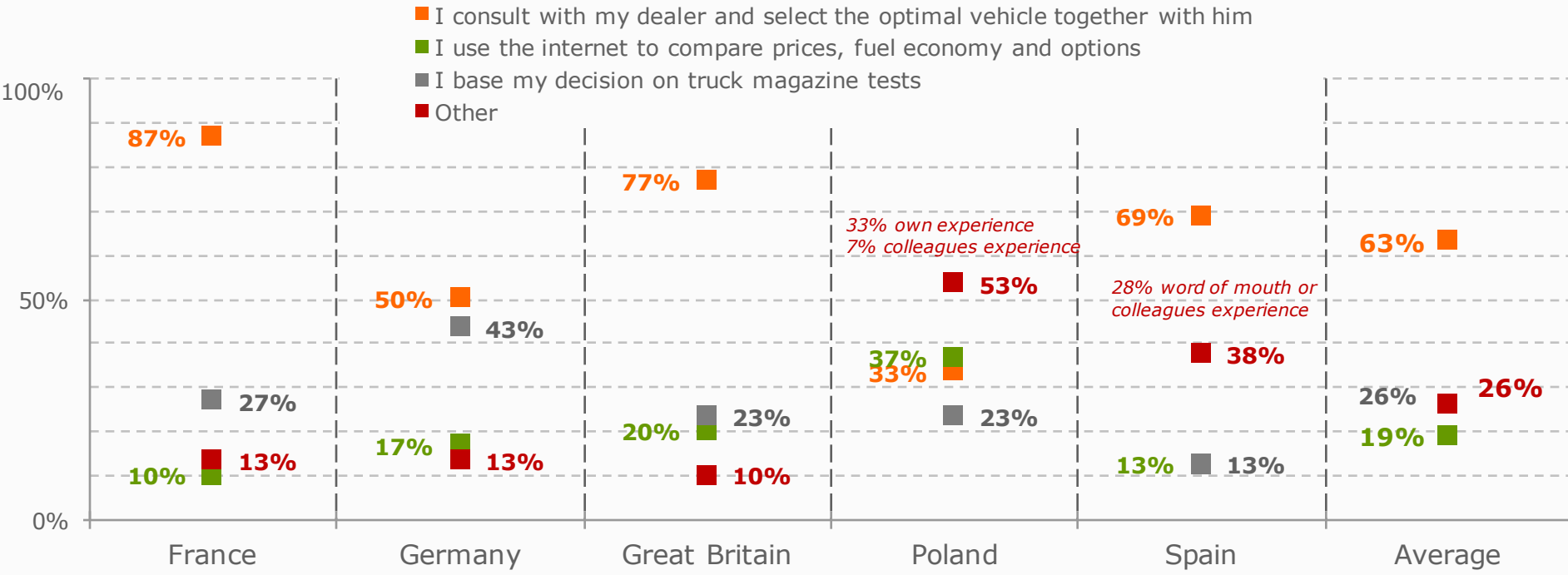
Do you feel the differences in fuel economy between new trucks from different brands are very significant?



Modalities used to compare truck brand vehicles

87% of the French sample consult the brand dealer to select the optimal vehicle with him

- French, British and Spanish interviewed truck owners mainly rely on the brand dealers to select the vehicle; Spanish also rely on colleagues and word of mouth.
- German are the most numerous to use truck magazine tests (43%) even if they also rely on brand dealer (50%).
- Polish rely on their own experience or on brand dealer or on Internet.



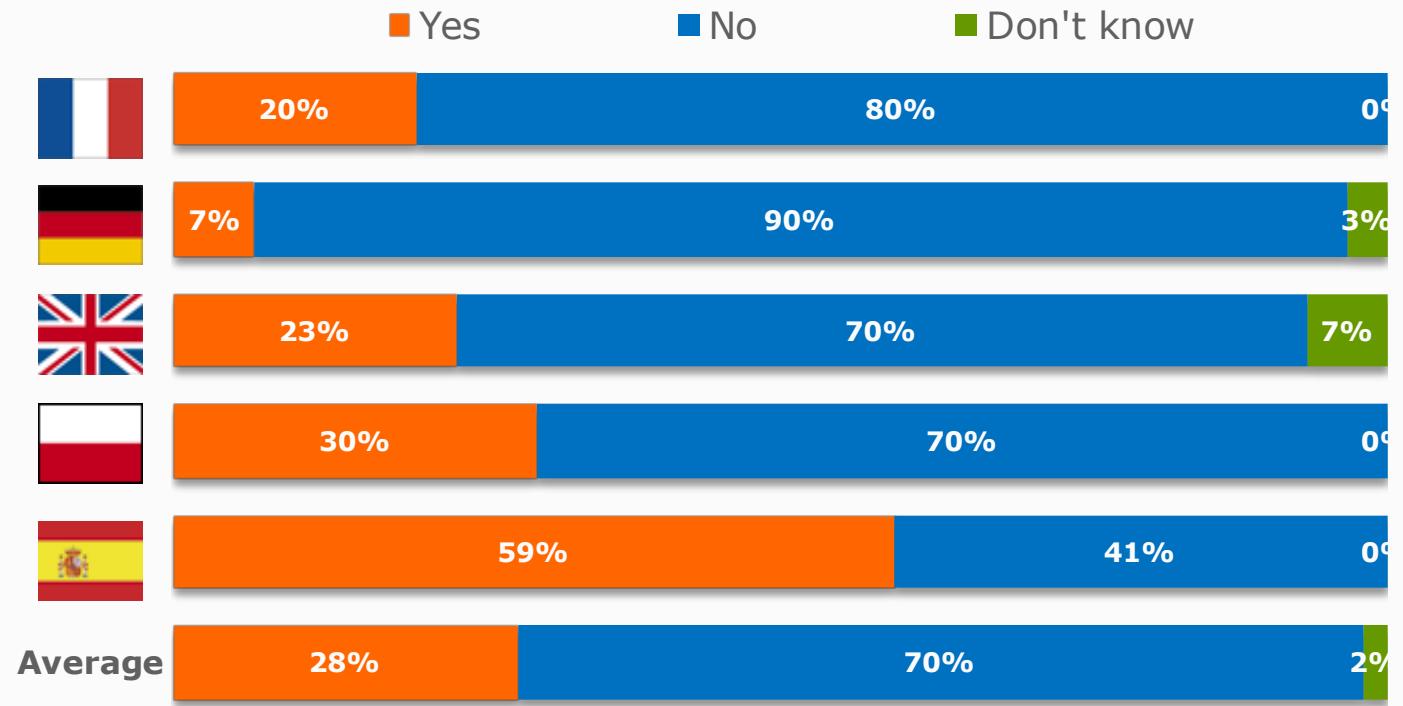
When buying a new truck, how do you compare offers?



Use of an European computer simulation.....

20% of the French sample stated they would base future purchase decisions on an European computer simulation

- Except Spanish, most of the interviewed truck owners would not base their future purchase decisions on a European computer simulation.

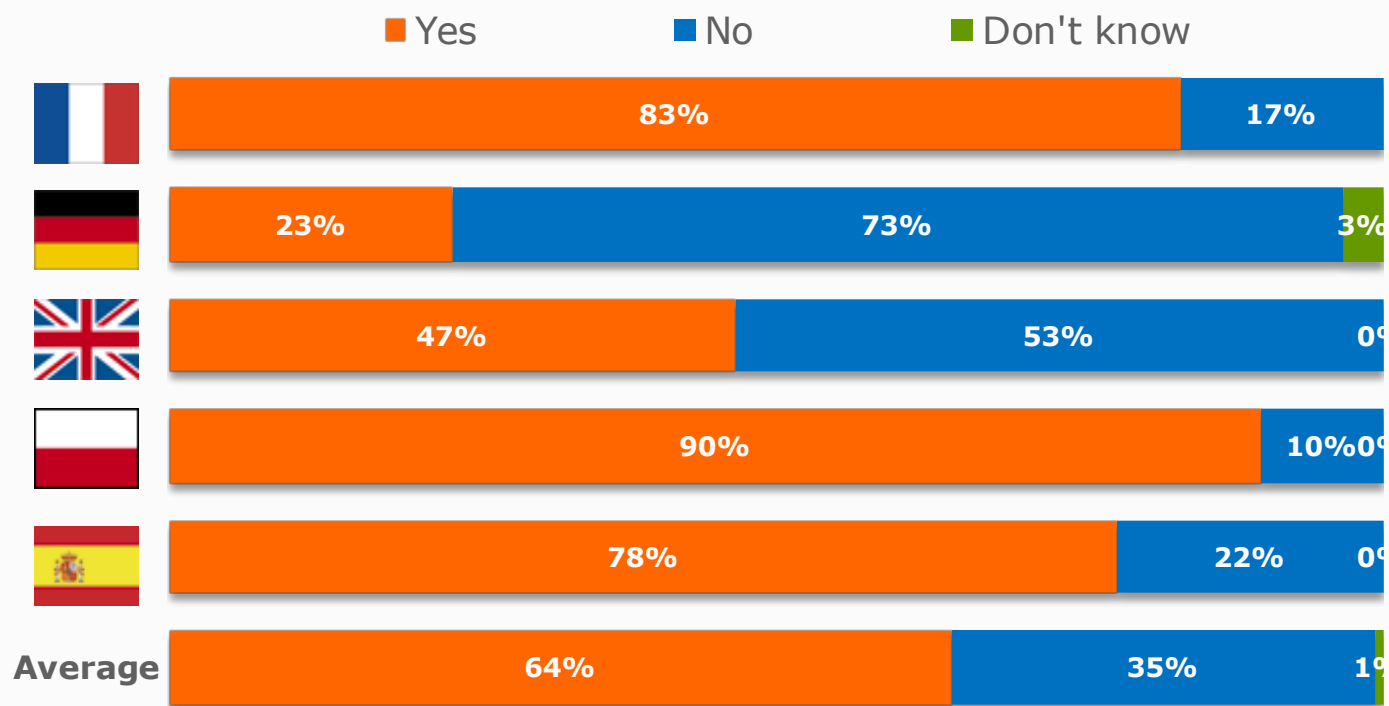


Would you base future purchase decisions on a European computer simulation?

Impact of the real test on the European fuel economy figure tool

83% of the French sample stated they would trust the European fuel economy figures more if they were based on real world testing and not only computer simulation

- In all the countries, the 'real world test' provides a higher trust on the fuel economy figures.



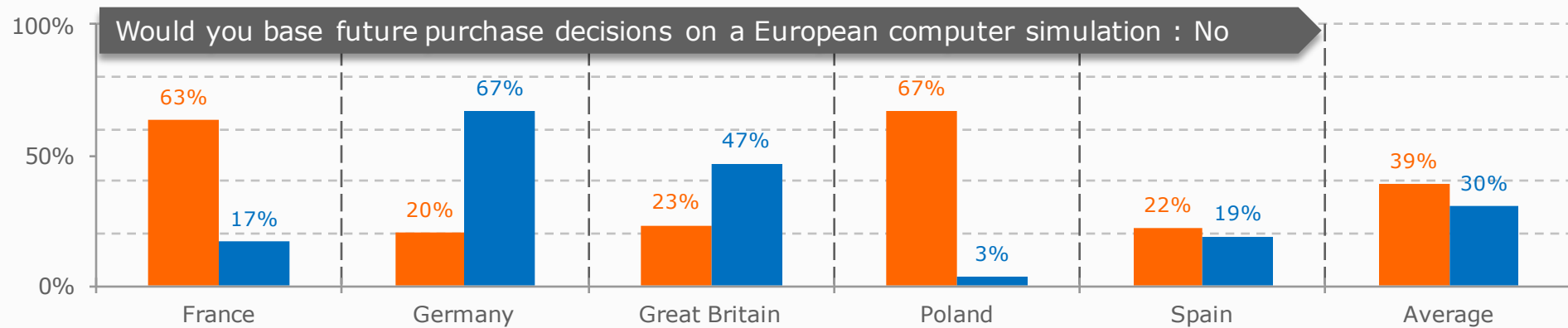
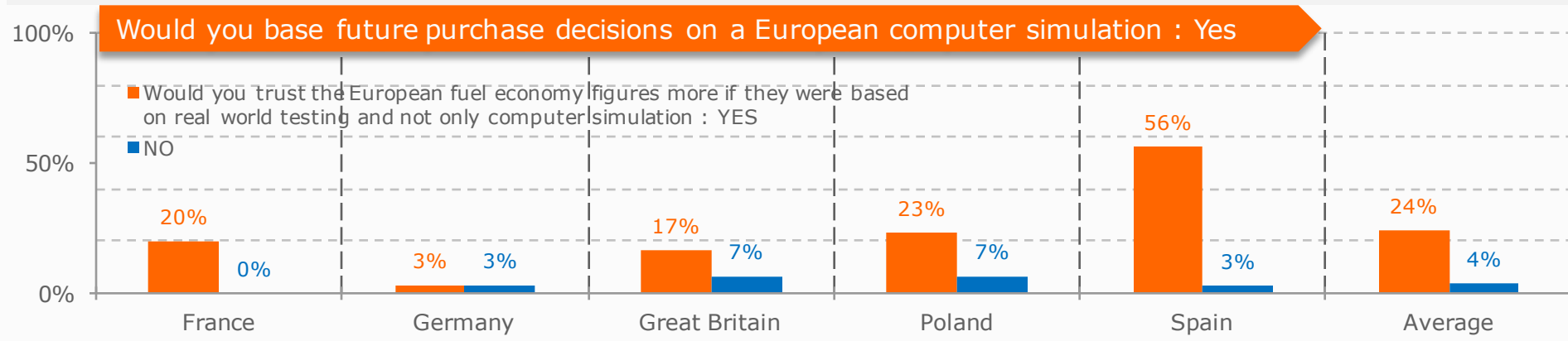
Would you trust the European fuel economy figures more if they were based on real world testing and not only computer simulation?



Use of an European computer simulation & impact of the real test

20% of the French sample stated they would trust the European fuel economy figures and would trust European fuel figures

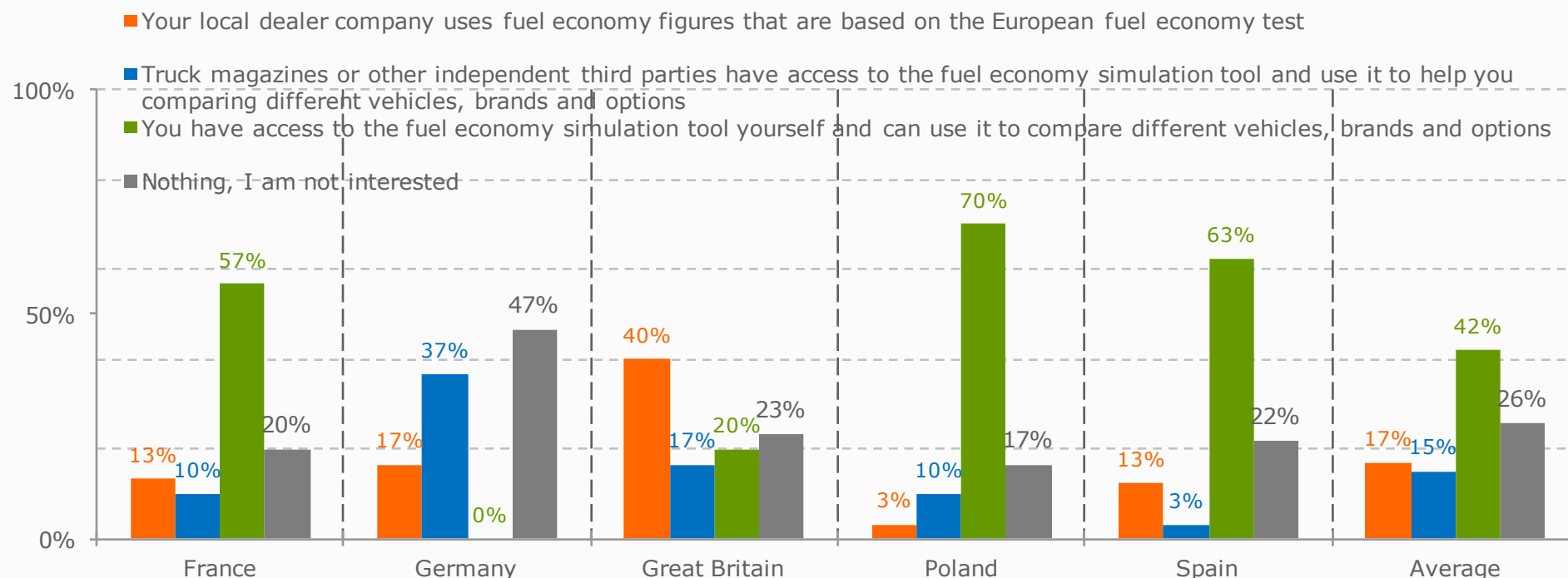
- For the truck owners that stated they "would base their future purchase decisions on a European computer simulation", the real test would help them to trust more the tool.
- For the others, it helps a lot in France and Poland, but not at all in Germany and in Great Britain.



Use of an European computer simulation & impact of the real test

13% of the French sample stated their local dealer company uses fuel economy figures that are based on the European fuel economy test, would be the best help to select the most fuel efficient and fit for purpose vehicle

- French, Spanish and Polish interviewed truck owners, clearly prefer to have access to the fuel economy simulation tool and to be able to use it to compare different vehicles, brands and options.
- German are not interested by that tool access or prefer third independent party to use it and provide them results.
- British definitely prefers that the truck dealer use the tool.



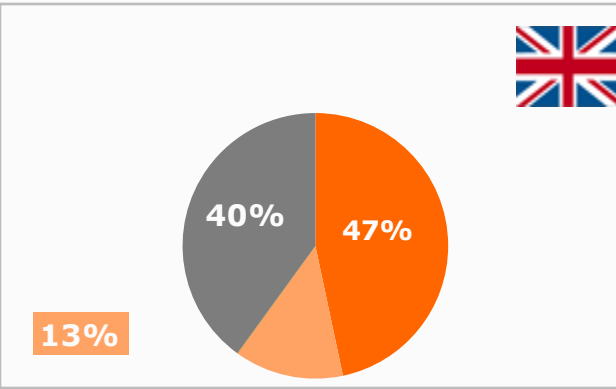
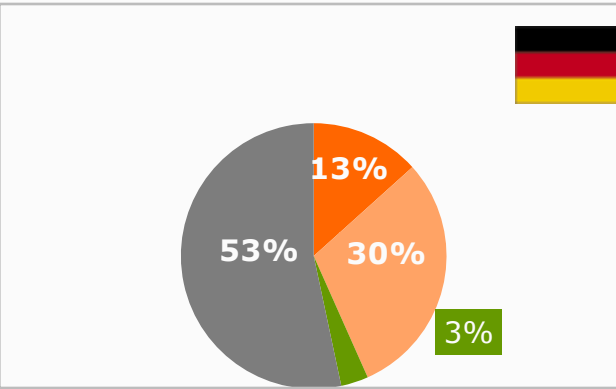
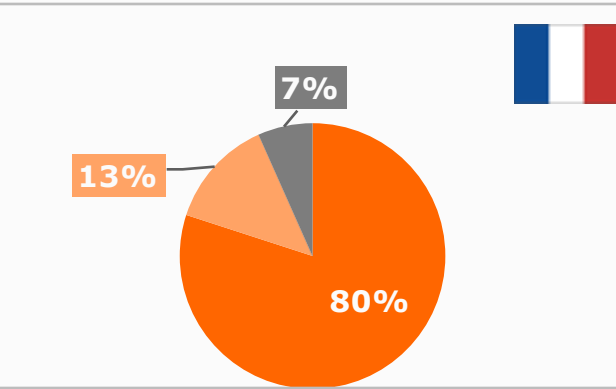
What would best help you most to select the most fuel efficient and fit for purpose vehicle?



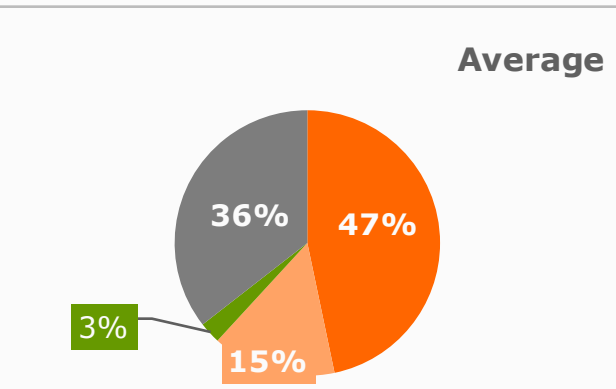
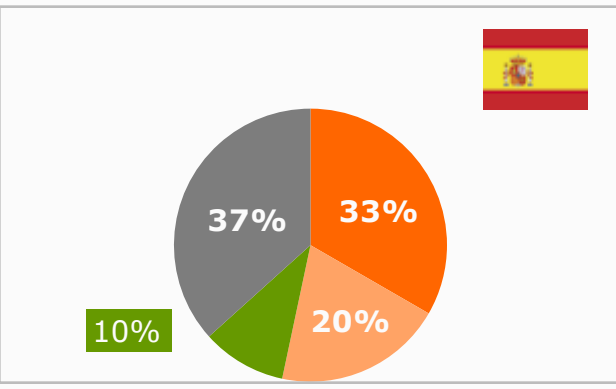
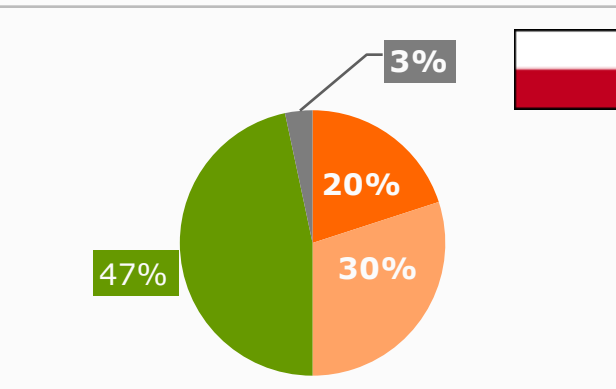
Fuel saving options

80% of the French sample stated when they buy a new truck, they consider fuel saving options and packs, selecting and purchasing them together with my dealer

- French, Spanish and Polish interviewed truck owners, clearly prefer to have access to the fuel economy simulation tool and to be able to use it to



■ Yes, I select and purchase them together with my dealer
 ■ Yes, if the discounts offered by my dealer are sufficient
 ■ Yes, but I prefer to buy them on the aftermarket
 ■ No



When you buy a new truck do you consider fuel saving options and packs (for example a spoiler, aerody.)?

