A Datamonitor Interactive Model

European Fleet Markets Database
and
European Fleet Lessor Database

launch date: Jun-04   code: IMAU0053 and IMAU0054

Why buy these models?

- **Identify** the fastest growing countries in the European company market to enable better targeting and market penetration. Highlight the most popular acquisition methods in Europe and understand how levels of maturity have changed over the last few years.

- **Highlight** potential opportunities in the company car market utilizing the forecasts provided within the model. Plan your strategy and target your resources based on the most relevant trends for the fututre.

- **Assess** the market in terms of segmentation by end-user fleet size and customers to inject greater depth in your customer targeting.

- **Gain** an insight into the operations of all the major lessors operating in the European market, including international and domestic companies. Highlight potential merger and acquisition targets.

- **Benchmark** your operations against your key competitors in the marketplace across several variables, including fleet size and fleet growth.

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An introduction to the models

Datamonitor's **European Fleet Market Database** and **European Fleet Lessor Database** are an essential interactive aides for anyone connected to the fleet industry, whether they are fleet lessors, vehicle manufacturers or aftermarket providers.

Detailing information across the seven leading markets Belgium, France, Germany, Italy, the Netherlands, Spain and the UK, these models map the volume and segmentation of the company car market and the players involved, all at the touch of a button.

Scope and coverage of the models

Fleet Market Database:
Highlights the historical and forecast volume of the company car fleet and purchases across Europe, including segmentation of several key variables such as:

• Acquisition methods: operational leasing, finance leasing, outright purchase
• Fleet management methods: maintenance management, accident management and several more
• End-user fleet size + customers: < 5 vehicles, 6-25 vehicles, 26-100 vehicles, 101-500 vehicles, 501+ vehicles

Fleet Lessor Database:
Provides a detailed view of fleet operations of the 50 leading fleet lessors operating in Europe for the period 2003-2004. Details provided include:

• Total fleet size
• Operational leasing fleet size
• Fleet growth
• Market share
• Key developments

This database allows you to choose specific companies to benchmark, as well as providing rankings for companies in all countries.
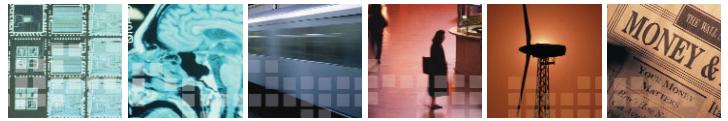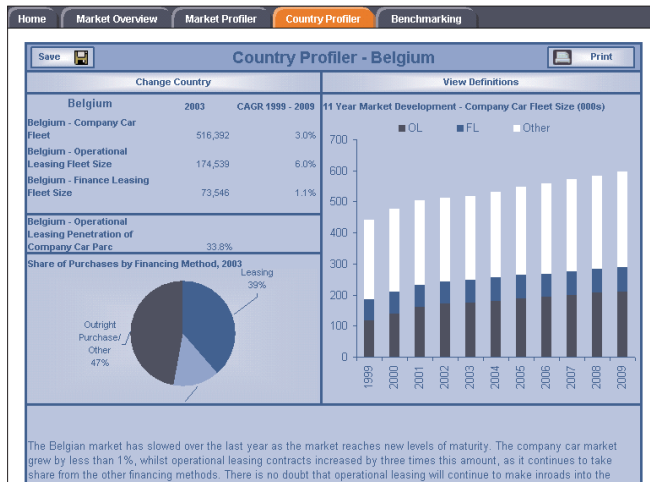
# Download the following information...

Country Overview

Provides an 'at-a-glance' overview of each country's operations, including company car fleet size over a 10 year period, key recent developments within the company car market and an overview of fleet management


The Market Profiler

Presents data across a range of variables including fleet by vehicle size, fleet by end-user fleet size, by acquisition method, and several more
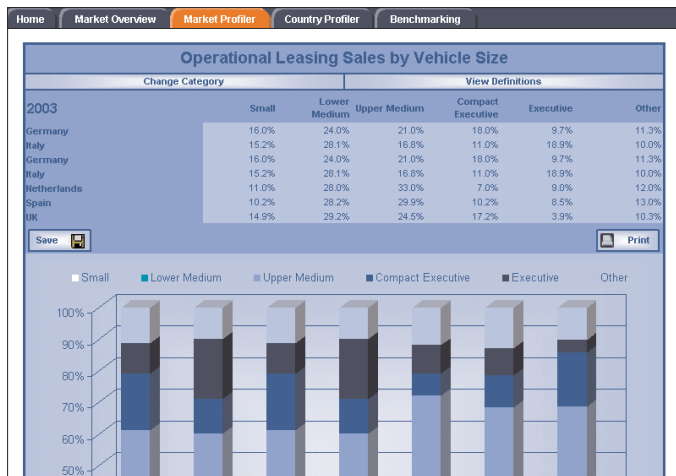
Lessor Profiler

Provides an 'at-a-glance' view of each of the 50 lessors provided in the database – information provided includes fleet size segmented by financing method over a three year period, an overview of recent company developments as well as key overview data on the company's geographical presence and parent organization
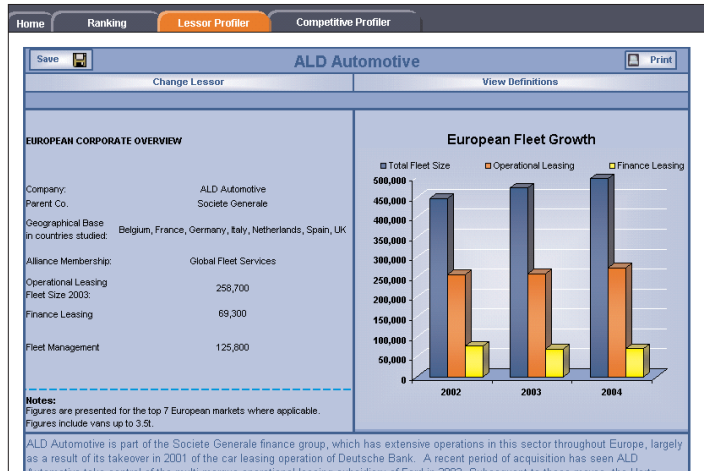
Ranking Sheet

Provides an overview of the leading players within each market ranked on the basis of total fleet size or operational leasing fleet size.
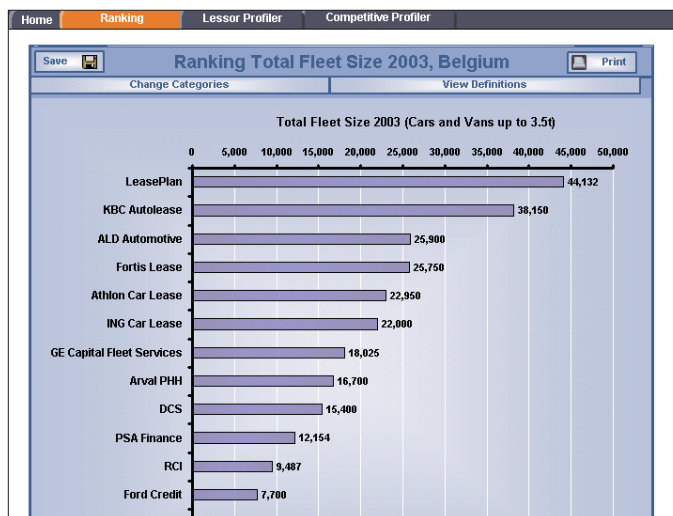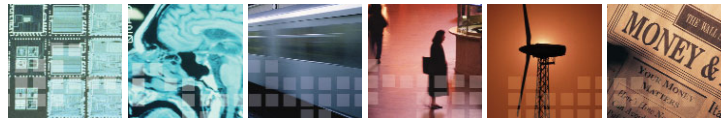
Research methodology

Across all our Fleet databases, we publish over **500 original data-points per country**. Some of these are new and have not been presented previously, but the majority are updates to existing data sets that we already have. Our methodology is a combination of the following research/cross-checking methods:

- **Primary Research**: (Questionnaires - data + interview questionnaires). Using in-house data, we design questionnaires which are then sent to respondents. The data from the questionnaires are then used to calculate our initial estimates. We ensure that at least 80% of the market is covered with regards to responses before proceeding to the second stage of checking.

- **Secondary Research**: After the aggregation/calculation of data from the primary research phase, the first stage results are checked against similar information available within the secondary domain. At this stage, we also double-check definitions that were defined in stage one.

- **Data Synthesis**: The incorporation of secondary data estimates is conducted in the data synthesis stage of the process. The data synthesis stage provides the final estimates for round one of the research phase.

- **Industry Cross-Check**: The final stage of round one is to check our estimates against experts in the industry. In this stage, our panel of experts are provided with assumptions and data points for review and comment. If any deviance between our panel and our first-round research results are identified, the research phase begins again for the specific (and related data points). This process will continue until a strong consensus is reached between Datamonitor analysts and the expert panellists.
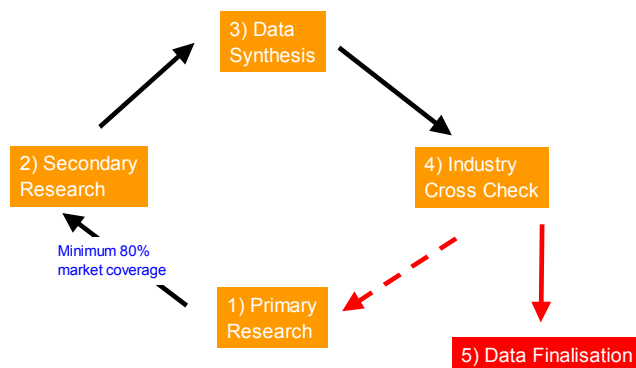
Forecast data methodology

For forecast data, we tend to rely on several factors:

- **Expert opinions**
- **Sector specific variables**
- **Technology developments**
- **Legal + Taxation changes**
- **Economic variables**

The Datamonitor Fleet Forecaster uses historical data (including its underlying assumptions) and forecasts these variables for 5 years from the last year of full year data, taking into account all the elements above.

We believe that in the Fleet Market, beyond economic factors, the market is driven by subjective factors such as market sentiment. To this end, whilst our model adjusts for all technical and economic developments in the marketplace, we check the estimates with external panels for accuracy.

We would also check the reality of the impact of our assumptions to ensure that we are not being too pessimistic/optimistic about the impact of market developments. Our forecasts are only finalized when a reasonable consensus is reached on both assumptions and the data. Any changes/reviews of our assumptions are inserted back into the model for future use.

Interested in this topic?

This report is part of Datamonitor's Fleet Information Solution.

This continuous advisory service offers you a wide-ranging supply of information on the European aftermarket industry - delivered to you in a variety of products. These have been designed specifically with you in mind, giving quick and easy access to key data and detailed analysis.

In-depth country coverage of the largest European markets:
Belgium · France · Germany · Italy · Netherlands · Spain · Sweden · UK

Other products available in this series

European Fleet Procurement Survey

This report highlights the views of fleet managers across Europe. It provides an insight into several aspects of fleet policy and operations, in particular the key criteria used in choosing a supplier, the involvement of the vehicle manufacturer within fleet decision making, the key decision makers in fleet matters, and the purchasing intentions of fleet managers in 2004.
Published: Feb-04   *Product code: DMAU0224*

European Used Car Database

This database highlights the distribution of used cars from initial sources such as manufacturers and corporate fleets to the end-user via retail channels. In addition to this, the database provides remarketing channels and volumes for all the leading suppliers to the used car market. Finally, the database provides information on the total used car market including key segmentation and forecasts.
Published: Feb-04   *Product code: IMAU0052*