

European Fleet Solutions Package

A compilation of published market information designed to give you valuable and complete market insight

This package comprises:

- **Interactive Database:** key data points and metrics for all major fleet markets

Use this package to...

Access the most up-to-date and detailed data on the fleet, company car and operational leasing markets across Europe

Introduction

As the company car market matures across Europe, competition is driving down margins.

This has resulted in several fleet service providers exiting the market, with others considering their future development. With growth slowing or stagnant in several segments of the company car market, it is crucial to focus on the opportunities that currently exist or are expected to grow in the future.

This package provides quantified and in-depth information about the fleet, company car and leasing markets in a choice of countries, with detailed analyses of the major trends that are demonstrated by current market trajectories. Top-level comparison with other European markets, as well as detailed breakdowns of service offerings, provide a valuable and complete insight into the market. This will give you the necessary strategic edge to ensure success.

Package components

- **Interactive Database:** An Excel-based database, which is extremely user-friendly in terms of navigation, lookup and built-in functionality, designed to provide you with key data points and metrics in graphic as well as a raw format.

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About the interactive database

Country Overview

The Country Overview provides an 'at-a-glance' overview of each country's company car market including company car fleet size over a ten-year period, key recent developments within the company car market and an overview of fleet management.



Market Overview

The Market Overview presents data across a range of variables including fleet by vehicle size, fleet by end-user fleet size, by acquisition method plus several more.



Why buy this package?

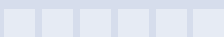
- **Access the most up-to-date and detailed data** on the fleet, company car and operational leasing market in seven countries, including market size and growth, fleet segmentation, sector shares and benchmarking metrics.
- **Assess your performance** against the market as well as the leading players in the fleet market across seven countries.
- **Access in-depth analysis** of all the key developments and trends taking place across Europe.
- **Pinpoint potential opportunities** in the company car market by utilizing the forecasts provided within the model. Plan your strategy and target your resources based on the most relevant trends for the future.
- **Strategically 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.

An up-to-date and detailed source of data...

This information package 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 plus several more
- **End-user fleet size + customers:** < 5 vehicles, 6-25 vehicles, 26-100 vehicles, 101-500 vehicles, 501+ vehicles
- **Leading players** within the operational leasing market including fleet sizes and growth

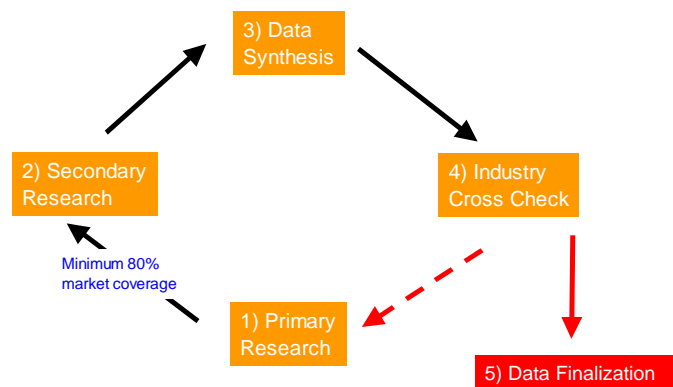
“...Despite its maturity, the French leasing market has demonstrated substantial growth in recent years. However, the situation is changing as more challenging economic conditions cause companies to rethink their fleet acquisition strategies in order to extend vehicle replacement periods...”



Methodology supporting our databases

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

- 1) **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 responses before proceeding to the second stage of checking.
- 2) 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 1.
- 3) 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 1 of the research phase.
- 4) The final stage of round 1 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 generally strong consensus is reached between Datamonitor analysts and the expert panellists.



“...Sharply declining residual values and the maturity of the company car market are having a big impact on the Dutch leasing market, with leasing players facing increasingly severe competition. Operational leasing products already dominate the market, which is limiting the potential for growth...”



Forecast data

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 five 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.

"I have found that the Datamonitor reports are well researched [and] well presented..."

European Marketing Operations Manager

"...Low company car penetration in Spain, creates ample opportunities for growth, especially for operational leasing, which is beginning to overcome the disinterest the market has previously shown towards fleet operation. Continued growth in the operational leasing sector will occur despite the unstable market conditions..."

