

INTERNET PRACTICES OF COMMERCIAL FLEETS

A Syndicated Market Research Survey of Commercial Vehicle Operators Providing In-depth Analysis on Internet Usage by Fleet Administrators and What Vendors Can Do To Improve the Effectiveness of Their Internet Marketing Programs

SITUATION:

- In 2000, Havill research found that less than 20 percent of fleet administrators reported using the Internet for fleet related activities. Just five years later, our 2005 study showed that usage of the Internet had jumped to nearly 60 percent – a three fold increase.

SIGNIFICANCE:

- The Internet offers marketers the opportunity to reach fleet administrators with their product and service communication at a fraction of the cost of print advertising and trade shows.
- Businesses that fail to keep up with best Internet marketing practices risk losing brand position to competitors who adapt their communication strategy toward fleet operators who rely on the Internet for research and for making purchase decisions.

ISSUES BALLOT:

- The purpose of the issues ballot is to determine if there is sufficient interest among industry suppliers to sponsor a telephone survey of fleet administrators that will provide an in-depth analysis on their Internet usage and what vendors can do to improve the effectiveness of their Internet marketing programs.
- Completing the issues ballot DOES NOT commit your company to subscribe to the proposed research.
- Completing the issues ballot DOES ensure that issues important to your company are included in the survey questionnaire, should you later decide to subscribe.

ISSUES BALLOT

PLEASE RETURN THIS BALLOT 1 OF 3 WAYS:	COMMENTS FROM:
Internet: www.havillconsultants.com/2009Internet	Name:
Email: aneifert@havillconsultants.com	Company:
Fax: (419) 841-2211 fax	Phone #:
	Email:

INSTRUCTIONS:

1. To the left of each issue, please circle its importance as: H (High), M (Medium), or L (Low).
2. Please add any additional comments you may have in the appropriate section. If you have any issues that you do not see identified in this ballot, please make a note of those as well.
3. If you have specific questions that you would like to see asked in an industry study, please attach a separate list of those questions and we will incorporate them into the questionnaire design.
4. Please submit the issues ballot in one of three ways; submit a ballot online by going to www.havillconsultants.com/2009Internet, email this ballot back to aneifert@havillconsultants.com, or print and fax the ballot back to 419-841-2211.

TO THE LEFT OF EACH ISSUE, PLEASE CIRCLE ITS IMPORTANCE AS: H (HIGH), M (MEDIUM), OR L (LOW).

H M L **General Fleet Industry Research Habits** – Internet technology and its use has been rapidly expanding throughout the business sector. The purpose of this section is to benchmark how fleet administrators use the Internet and how important it is relative to their other sources for gathering industry information.

- How do fleet administrators receive news on industry trends
- Ranked importance of the different information sources as perceived by Fleet administrators
 - Internet sites
 - Email
 - Mail
 - Fax
 - Retailer/distributor showrooms
 - Trade Magazines
 - Trade shows/industry conferences
 - Personal sales visits
- To what extent do fleet administrators use the Internet to research and purchase new product and services
- What is their opinion as to whether or not their use of the Internet will grow as a fleet administration tool

Additional Comments: _____

H M L **Current Internet Access and Use** – This section will collect demographic information on how fleet administrators access and use the Internet:

- Do fleet administrators have access to the Internet at work
- What type of Internet access do fleet administrators have – T1, cable, DSL, dial-up
- How much time do fleet administrators spend on the Internet for job related duties
- Do fleet administrators have mobile access to the Internet
- Which fleet related websites are accessed by fleet administrators
- Which fleet administration tools do they use on the Internet
 - Planning and budgeting for purchasing and maintaining vehicles
 - Hiring, training, and managing fleet personnel including driver background checks
 - Registering and insuring vehicles
 - Fueling vehicles, accessing fuel reports and locating facilities
 - Disposing of used vehicles and equipment
- Which search engines are used by fleet administrators
- How does usage breakout by age and interest segmentation among Internet users and non-users

Additional Comments: _____

H M L **Current Internet Use and Purchasing Habits** – The purpose of this section is to benchmark the current purchases being made by fleet administrators over the Internet and also determine if Internet purchases will grow over the foreseeable future.

- Are purchases currently being made over the Internet
 - Which fleet products are currently being purchased over the Internet
 - What is the volume of purchases made over the Internet
- In the future, will fleet products or services be purchased over the Internet
 - Which products and services will be purchased
 - Will Internet purchase volume increase
- Why is the Internet not used for purchasing by fleet administrators (by product category)
- If a better price were offered on Internet purchases, would fleets be more inclined to use the web
- What other fleet management activities is the Internet used for

Additional Comments: _____

H M L Offline Purchase Influencers – Traditional marketing and sales channels include a variety of options for researching, evaluating, and purchasing products. It is important to understand which offline sources have the most influence on customer purchases. The purpose of this section is to benchmark the interest and use of offline influences in the research, evaluation and purchasing of fleet products.

- Rating of offline influences that are important to fleet administrators in researching new products
 - Trade shows
 - Seminars
 - Direct mail
 - Newspapers
 - Radio
 - Colleague or peer word-of-mouth

Additional Comments: _____

H M L Online Purchase Influencers – The Internet itself offers many different information channels for researching, evaluating, and purchasing products. It is important to understand which online sources have the most influence on customer purchases. The purpose of this section is to benchmark the interest and use of online influences in the research, evaluation and purchasing of fleet products.

- Rating of online influences that are important to fleet administrators in researching new products
 - Standard search engines such as Google, Yahoo, and Bing
 - Vendor websites
 - Distributor websites
 - Buyer's guide with side-by-side product comparisons of competing vendors
 - Online word-of-mouth through forums and newsgroups
 - Online videos
 - Opt in email
 - Webinars
 - Social net sites

Additional Comments: _____

H M L Top Vendor Website Features – Vendor websites are likely one of the top online influencers. Therefore it is important to understand what sort of information buyers are looking for on their vendors' websites. This section will rank the importance of the different site features when researching, evaluating and purchasing fleet products.

- Rating of vendor website features that are important to fleet administrators in researching and purchasing new products
 - General product information
 - Downloadable white papers
 - Downloadable product information
 - Side-by-side product comparisons
 - Access to reviews and product ratings from other fleet administrators
 - Ability to view vendor video presentations
 - Product pricing
 - Live chat for immediate answers to product inquiries
 - Ability to request a sales call
 - A library of RFQ templates specific to the products or services being purchased

Additional Comments: _____

H M L Requesting and Evaluating Bids, Making Purchases for the Fleet – The Internet has become a popular source for pre-sales research. As the technology develops and fleet administrators become more comfortable using the Internet for many of their activities, more and more of the research, RFQ, evaluation, and final purchase process will be facilitated through the web. The purpose of this section is to benchmark the interest and use of the Internet for proposal request and evaluation along with making the final purchase.

- Are fleet purchases made on a contract basis, as needed, or both (by product category)
- How is the decision made to buy on contract or as needed (by product category)
- Which products are bought on contract and which are bought as needed
- What are the most time-consuming tasks for purchases made on a contract basis
- How often do fleet administrators go with the same vendor vs. shopping for the best deal
- How do fleet administrators initiate contact with selected vendors
 - Telephone
 - Visit retailer/distributor
 - Request personal sales visit
 - Website/online chat/email

Additional Comments: _____

H M L Client Website Evaluation – Based on the results of the research and fleet administrator survey, subscriber websites will be evaluated to determine how well they deliver the information needs of fleet administrators. A specific list of enhancements will be provided to improve the marketing effectiveness of client Internet marketing initiatives. Topics to be covered include:

- Making it easy for fleets to find you – web page rankings by search engine
- The website's visual appeal
- Navigation – how easy is it go from page to page to find product and service information
- Can fleet operators find the information they are looking for – specs, instructions, pricing, delivery...
- Are product brochure, white papers, testimonials, video demos provided
- Contact options – live chat, email, sales call
- Wholesaler/Dealer/Store locator
- Call to action – request for quotation, online ordering, promotions
- Sales support – warranties, returns, repairs, after sale service
- Overall website appeal and usability

Additional Comments: _____

H M L Supplier Profiles Posted on the Internet as a Study Deliverable – Over the past decade, our company has compiled a marketing file of about one million businesses that operate fleet vehicles. As a study deliverable, your company profile would be posted on a website along with other study subscribers. This website would be searchable by the fleet community at large. In addition, emails would be sent to businesses in our FleetLeads database to raise awareness of your web presence.

Additional Comments: _____

H M L **U.S. Commercial Fleet Market Segmentation** – The commercial fleet market is large and diverse. To enhance the value of this research, results will be broken out by demographic fleet characteristics, as shown below. This will enable subscribers to analyze segments they target and develop appropriate Internet marketing initiatives for each.

- Fleet Size – Small Fleets, Mid Fleets, Large Fleets (RANGE)
- Vehicle type – automobiles, LD, MD, and HD/trucks, tractors, buses, trailers
- Travel characteristics - local vs. regional vs. national
- Leased vs. Owned
- Home based vs. Dispersed
- Commercial market segmentation – government, construction, service, manufacturing, agriculture, wholesale, retail, utility, over the road long haul, for-hire short haul
- Fueling methods – On-site vs. Off-site
- Maintenance methods – On-site vs. Off-site
- Purchase decision makers – what are the titles of those who participate and make the final decision on fleet related purchases

Additional Comments: _____

Other Issues or Topics for Inclusion: _____

Thank you for your time and thoroughness in filling out this issue ballot. If you have any questions regarding the study please feel free to visit us at www.havillconsultants.com or give us a call at 419-841-2244.

N:\Projects\MCS 2009 Internet\Issues Ballot\Issues Ballot, 8-12-09.doc