



## **Car and Van Rental Market Review**

March 2024

Welcome to the annual BVRLA Rental Operator Review.

The primary objective of this review is to provide a timely and reliable study of market trends within the vehicle rental market in the UK.

The data reported in this questionnaire will be treated in strictest confidence. Figures given in the results will be published in an aggregated form only, and quotations will be repeated in anonymised form only.

This review asks about:

- **Rental activities only;** *please do not include leasing activities*
- **Fleets within the UK only;** *please do include Northern Ireland, but do not include fleets overseas such as those on the Channel Islands and the Isle of Man*
- **Cars and Light Commercial Vehicles (LCVs) up to 3.5 tonnes;** *cars and LCVs will be asked about separately*

We are asking about data for last 12 months; 1st March 2023 - 29th February 2024.

**Please supply annual data only.**

## SECTION A: COMPANY DETAILS

A1

Company Name:

A2

Does your organisation offer a rental service of:

a) Cars

b) LCVs

Yes

No

A3

Who should we contact if we have queries about your responses?

a) Name:

b) Job Title:

c) Email:

d) Telephone:

## SECTION B: RENTAL CARS

### This section is about CARS ONLY.

Please only include vehicles owned and operated by your company which are available for hire in the UK.

If you offer both rental and leasing, please complete this review for **RENTAL ACTIVITIES ONLY**.

Please do include fleets in Northern Ireland, but do not include those on the Channel Islands or Isle of Man.

Please treat people carriers and minibuses with up to 9 seats (including driver's seat) as cars.

#### B1 What were the average emissions of a car on your fleet (in gCO<sub>2</sub>/km)?

In gCO<sub>2</sub>/km

For the year 1st March 2023 - 29th February 2024:

#### B2 Please provide the total number of cars on your fleet, as of 29th February 2024, by Vehicle Excise Duty Band (VED) (CARS ONLY)

Number of cars

a) CO<sub>2</sub> Emission 0 (g/km)

b) CO<sub>2</sub> Emission 1-50 (g/km)

c) CO<sub>2</sub> Emission 51 - 75 (g/km)

d) CO<sub>2</sub> Emission 76 - 90 (g/km)

e) CO<sub>2</sub> Emission 91 - 100 (g/km)

f) CO<sub>2</sub> Emission 101 - 110 (g/km)

g) CO<sub>2</sub> Emission 111 - 130 (g/km)

h) CO<sub>2</sub> Emission 131 - 150 (g/km)

i) CO2 Emission 151 - 170 (g/km)

j) CO2 Emission 171 - 190 (g/km)

k) CO2 Emission 191 - 225 (g/km)

l) CO2 Emission 226 - 255 (g/km)

m) CO2 Emission over 255 (g/km)

**B3 Please provide a figure for the number of petrol, diesel, electric and hybrid cars you had on fleet as of 29th February 2024.**

(Please put '0' in the boxes if you do not have any of these types of cars.)

Number of cars

a) Petrol Only

b) Diesel Only

c) BEV

d) PHEV

e) HEV

**B4 Please tell us what proportion of your fleet is made up of.**

% at 29th

February 2024

a) Small cars (e.g. VW Up, Fiat 500, Ford Fiesta, Peugeot 108)

b) Medium cars (e.g. Ford Focus, Vauxhall Astra)

c) Large cars (e.g. Audi A4, Ford Mondeo)

d) Estate cars / SUVs (e.g. VW Passat Estate, Volvo V60)

e) 4x4 e.g. Range Rover Discovery

f) Sports or luxury cars (e.g. BMW 4 series coupe)

g) Multi-purpose vehicle or people carrier (e.g. Vauxhall Zafira, Ford Galaxy)

h) Other

**B5 Please tell us about the age profile of your car rental fleet.**

Annual Average

(1st March 2023 - 29th February 2024)

a) Age of cars on fleet (in months) at the end of this period:

b) Age of cars at disposal (in months):

c) Mileage of cars at disposal (in miles):

**B6 Please tell us the number of car rental transactions with customers who needed a vehicle adaptation due to a disability (e.g. rentals which required use of equipment from Lynx or use of a vehicle from a specialist company like AVH).**

Number of transactions

For the year (1st March 2023 - 29th February 2024):

**B7 Please tell us about the proportion of corporate, leisure and credit hire, rentals for your fleet.**

(If possible, please include:- rental through the broker channel in the leisure category.)

Annual Average (1st March 2023 - 29th February

2024)

a) % Leisure:

b) % Corporate:

c) % Credit Hire

% TOTAL (should add up to 100%)

B8 **Please tell us some more about your average leisure car rental transaction for this year for your TOTAL car fleet.**

(Please do not include non-revenue mileage in these figures.)

Annual Average (1st March 2023 - 29th February 2024)

a) Duration of average transaction (i.e. number of billed days):	<input type="text"/>
b) Mileage of average transaction (in miles):	<input type="text"/>
c) Average revenue per day per transaction including ancillary sales (in £):	<input type="text"/>

B9 **Please tell us some more about your average leisure car rental transaction for this year for your ICE car fleet.** (Please include all Hybrids in this calculation.)

(Please do not include non-revenue mileage in these figures.)

Annual Average (1st March 2023 - 29th February 2024)

a) Duration of average transaction (i.e. number of billed days):	<input type="text"/>
b) Mileage of average transaction (in miles):	<input type="text"/>
c) Average revenue per day per transaction including ancillary sales (in £):	<input type="text"/>

B10 **Please tell us some more about your average leisure car rental transaction for this year for your BEV car fleet.**

(Please do not include non-revenue mileage in these figures.)

Annual Average (1st March 2023 - 29th February 2024)

a) Duration of average transaction (i.e. number of billed days):	<input type="text"/>
b) Mileage of average transaction (in miles):	<input type="text"/>
c) Average revenue per day per transaction including ancillary sales (in £):	<input type="text"/>

B11 **Please tell us some more about your average corporate car rental transaction for this year for your TOTAL car fleet.**

(Please do not include non-revenue mileage in these figures.)

Annual Average (1st March 2023 - 29th February 2024)

- a) Duration of average transaction (i.e. number of billed days):
- b) Mileage of average transaction (in miles):
- c) Average revenue per day per transaction including ancillary sales (in £):

B12 **Please tell us some more about your average corporate car rental transaction for this year for your ICE car fleet. (Please include all Hybrids in this calculation.)**

(Please do not include non-revenue mileage in these figures.)

Annual Average (1st March 2023 - 29th February 2024)

- a) Duration of average transaction (i.e. number of billed days):
- b) Mileage of average transaction (in miles):
- c) Average revenue per day per transaction including ancillary sales (in £):

B13 **Please tell us some more about your average corporate car rental transaction for this year for your BEV car fleet.**

(Please do not include non-revenue mileage in these figures.)

Annual Average (1st March 2023 - 29th February 2024)

- a) Duration of average transaction (i.e. number of billed days):
- b) Mileage of average transaction (in miles):
- c) Average revenue per day per transaction including ancillary sales (in £):

B14 **Please tell us what the average percentage utilisation of your car rental fleet was. For the year (1st March 2023 - 29th February 2024):**

Average % Utilisation

- a) Petrol Only
- b) Diesel Only
- c) BEV

d) PHEV

e) HEV

f) Whole Car Fleet

**B15 How many car rental branches do you have in total?**

Car rental branches. (These may offer vans or other services in addition to cars)

**B16 Of the above, how many car rental branches do you have at airports?**

Car rental branches. (These may offer vans or other services in addition to cars)

**B17 Please tell us what percentage of your branches have chargepoint facilities and the type of chargepoint where known?**

a) Slow (2.5kw chargepoints)

b) Fast (7-22kw chargepoints)

c) Rapid (43-150kw chargepoints)

d) No chargepoints facility

**B18 Regional Activity. We would like to understand the size of the car rental market across the UK and activity across major cities. For each city can you indicate the approximate percentage of revenue that this market provides for your business. (Include airport business for each of these cities if appropriate.)**

Percentage of revenue

London

Birmingham

Glasgow

Liverpool

Bristol

Manchester

Sheffield

Leeds

Edinburgh

Leicester

Coventry



Bradford	
Cardiff	
Belfast	
Nottingham	
Others (total combined)	

## SECTION C: RENTAL LIGHT COMMERCIAL VEHICLES (LCVs) up to 3.5t

This section is about LCVs ONLY (up to 3.5t gvw)

Please only include vehicles owned and operated by your company which are available for hire in the UK.

Please do include fleets in Northern Ireland, but do not include those on the Channel Islands or Isle of Man.

Please treat people carriers and minibuses with up to 9 seats (including driver's seat) as cars and **do not** include them in this section. They should be included in the previous section.

**C1 Please provide the total number of LCVs on your fleet, as of February 29th 2024 by vehicle type - LCVs ONLY**

Number of LCVs

a) Small Vans < = 2.5t (include pickups and dropsides as weight appropriate)

b) Mid Size Vans > 2.5t < = 3.2t (include pickups and dropsides as weight appropriate)

c) Large Vans >3.2t < = 3.5t (include pickups and dropsides as weight appropriate)

d) Minibus / Passenger vans (9-17 seats):

**C2 What were the average emissions of a LCV on your fleet (in gCO2/km)?**

In gCO2/km

For the year 1st March 2023 - 29th February 2024:

**C3 Please provide the total number of LCVs on your fleet, as of 29th February 2024, by Vehicle Emissions LCVs ONLY)**

Number of LCVs

a) CO2 Emission 0 (g/km)

b) CO2 Emission 1-50 (g/km)

c) CO2 Emission 51 - 75 (g/km)

d) CO2 Emission 76 - 90 (g/km)

e) CO2 Emission 91 - 100 (g/km)

f) CO2 Emission 101 - 110 (g/km)

g) CO2 Emission 111 - 130 (g/km)

h) CO2 Emission 131 - 150 (g/km)

i) CO2 Emission 151 - 170 (g/km)

j) CO2 Emission 171 - 190 (g/km)

k) CO2 Emission 191 - 225 (g/km)

l) CO2 Emission 226 - 255 (g/km)

m) CO2 Emission over 255 (g/km)

C4

**Please provide a figure for the number of petrol, diesel, electric and hybrid LCVs you had on fleet as of 29th February 2024.**

(Please put '0' in the boxes if you do not have any of these types of LCVs.)

Number of vans

a) Petrol Only

b) Diesel Only

c) BEV

d) PHEV

e) HEV

  

**C5 Please tell us about the age profile of your LCV rental fleet.**

Annual Average (1st March 2023 - 29th February 2024)

a) Age of LCVs on fleet (in months) at the end of this period:

b) Age of LCVs at disposal (in months):

c) Mileage of LCVs at disposal (in miles):

**C6 Please tell us about the proportion of corporate and leisure hires for your LCV fleet.**

(If possible, please include:- rentals through the broker channel in the leisure category.)

Annual Average (1st March 2023 - 29th February 2024)

a) % Leisure:

b) % Corporate:

c) % Credit Hire / Breakdown

% TOTAL (should add up to 100%)

**C7 Please tell us some more about your average leisure LCV transaction for your TOTAL van fleet this year.**

(Please include all revenue mileage in these figures or specify below. Please do not include non-revenue mileage in these figures.)

Annual Average (1st March 2023 - 29th February 2024)

a) Duration of average transaction (i.e. number of billed days):

b) Mileage of average transaction (in miles):

c) Average revenue per day per transaction including ancillary sales (in £):

C8 **Please tell us some more about your average leisure LCV transaction for ICE vans this year.** (Include Hybrid in ICE transactions)

(Please include all revenue mileage in these figures or specify below. Please do not include non-revenue mileage in these figures.)

February 2024) Annual Average (1st March 2023 - 29th

a) Duration of average transaction (i.e. number of billed days):

b) Mileage of average transaction (in miles):

c) Average revenue per day per transaction including ancillary sales (in £):

C9 **Please tell us some more about your average leisure LCV transaction for BEV this year.**

(Please include all revenue mileage in these figures or specify below. Please do not include non-revenue mileage in these figures.)

February 2024) Annual Average (1st March 2023 - 29th

a) Duration of average transaction (i.e. number of billed days):

b) Mileage of average transaction (in miles):

c) Average revenue per day per transaction including ancillary sales (in £):

C10 **Please tell us some more about your average corporate LCV transaction for your TOTAL van fleet this year.**

(Please do not include non-revenue mileage in these figures.)

February 2024) Annual Average (1st March 2023 - 29th

a) Duration of average transaction (i.e. number of billed days):

b) Mileage of average transaction (in miles):

c) Average revenue per day per transaction including ancillary sales (in £):

C11 **Please tell us some more about your average corporate LCV transaction for ICE vans this year.** (Include Hybrid in ICE transactions)

(Please do not include non-revenue mileage in these figures.)

Annual Average (1st March 2023 - 29th February 2024)

a) Duration of average transaction (i.e. number of billed days):

b) Mileage of average transaction (in miles):

c) Average revenue per day per transaction including ancillary sales (in £):

C12 **Please tell us some more about your average corporate LCV transaction for BEV this year.**

(Please do not include non-revenue mileage in these figures.)

Annual Average (1st March 2023 - 29th February 2024)

a) Duration of average transaction (i.e. number of billed days):

b) Mileage of average transaction (in miles):

c) Average revenue per day per transaction including ancillary sales (in £):

C13 **Please tell us what the average percentage utilisation of your LCV rental fleet was.**  
For the year (1st March 2023 - 29th February 2024):  
Average % Utilisation

a) Petrol Only

b) Diesel Only

c) BEV

d) PHEV

e) HEV

f) Total LCV Fleet

C14 **How many LCV rental branches do you have?**

LCV rental branches. (These may offer Cars or other services in addition to Vans)

C15

Please tell us what percentage of your branches have chargepoint facilities and the type of chargepoint where known?

a) Slow (2.5kw chargepoints)

b) Fast (7-22kw chargepoints)

c) Rapid (43-150kw chargepoints)

d) No chargepoints facility

C16

Regional Activity. We would like to understand the size of the LCV market across the UK and activity across major cities. For each city can you indicate the approximate percentage of revenue that this market provides for your business. (Include airport business for each of these cities if appropriate.)

Percentage of revenue

London

Birmingham

Glasgow

Liverpool

Bristol

Manchester

Sheffield

Leeds

Edinburgh

Leicester

Coventry

Bradford

Cardiff

Belfast

Nottingham

Others (total combined)

## SECTION D: OTHER COMMENTS

**Do you have any other comments you would like to make about market conditions, other developments in the rental sector, your business or this questionnaire?**

*We will never reveal the identity of individuals making any comments, unless we have their expressed written permission.*



## **Thank You**

We appreciate you taking the time to fill out the review.

The results will shortly be made available to BVRLA members via our website.

If you have any further questions about the review, please contact Phil Garthside on [phil@bvrla.co.uk](mailto:phil@bvrla.co.uk) or Toby Poston on [toby@bvrla.co.uk](mailto:toby@bvrla.co.uk).