Creating the future of transport

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Car rental customer survey 2015

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Disclaimer

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BVRLA Foreword

Regardless of age, gender or income, the car remains the most common mode of transport in the UK, responsible for 64% of all personal trips and 78% of personal miles travelled.

Car rental is an integral part of this picture. Our research indicates that there are in the region of 10.9 million car rental transactions in the UK each year and around 7.8 million people who personally rent a car. The UK car rental fleet has grown consistently over the past five years, reflecting both the upturn in the economy, as well as the increasing popularity of 'pay-as-you-go' forms of road transport.

As this survey of personal rental customers in the UK shows, car rental is used by a wide variety of people, for a huge range of journeys and a myriad of reasons.

The affordability, accessibility and flexibility of car rental and car clubs are enabling an increasing number of people to adopt a more sustainable approach to their transport needs. This is particularly evident in urban areas, where the cost and hassle associated with running a car is causing many city-dwellers to re-think their attitude to car ownership.

The evidence suggests that car rental enables a large number of drivers to avoid owning a car or own fewer cars. On average, rental customers walk and cycle more often and make more frequent use of public transport than the average driving licence holder. Customers tell us that car rental helps them link with these and other forms of transport.

The average rental car is used more efficiently than private cars, with more than 70% of rentals involving two or more people travelling in the vehicle.

For most people, using a rental car is the safer, more sustainable road transport option. The average rental car is less than one year old, is checked before every rental and produces fewer emissions than the average privately owned car.

The BVRLA Rental Customer Survey is the most comprehensive dataset collected across the car rental sector. It highlights the vital role that the car rental sector can play in meeting the needs of UK travellers and addressing the challenges faced by transport policymakers.

G. Keaney

Gerry Keaney, Chief Executive

Executive Summary

Introduction

This report summarises the results from a survey of UK car rental customers and provides some up-to-date insight into car rental impacts on travel behaviour and its relationship with other modes of transport. It includes information about the characteristics of car rental customers, their attitudes to car ownership and their openness to a range of new mobility models, including car sharing and car clubs.

This study contains the responses of 1,691 UK residents who made a personal rental in the UK, from one of six major car rental companies. It builds on a previous customer survey undertaken by TRL on behalf of the BVRLA in 2012.

To put these findings in context, the BVRLA commissioned a separate survey in December 2015, designed to be representative of UK adults, which found that around 7.8 million people (15% of the adult population) made a personal car rental in the UK that year. Separate operator data provided by BVRLA members suggests that there are around 10.9 million personal and corporate car rental transactions in the UK each year.

Car rental appeals to a wide range of people for many different reasons

As in the 2012 survey, one of the key findings is that rental is used by a very diverse range of people for a wide variety of purposes. All age bands (21 years +) and all Mosaic categories[1] were represented, with respondents living in all parts of the UK, and in both urban and rural locations.

A wide variety of reasons for using rental were given, with the most common being holidays or visiting family and friends. 16% of rentals were reported to be at least partly for business travel, and more detailed responses from 247 people using rental for business indicated that they also came from different parts of the UK, and worked for organisations of a range of sizes.

There is clear evidence that car rental is used by a relatively high proportion of non-car owning households. Nearly a third of non-business users said that their household didn't usually have a car (compared to 25% of British households in 2012), and this was particularly true for those living in London and other major cities, where levels of car ownership are much lower. (58% of non-business renters from London and 44% of those from other major cities reported having no household vehicle.)

Similarly, a quarter of rentals were made because the customers' own vehicle was not available or suitable.

Car rental is often used instead of public transport for a variety of considered reasons. 'Convenience and flexibility' was given as a key factor for about two-thirds of rentals. Complex journeys, travelling with baggage or more than one person and time were also cited as reasons.

[1] Mosaic is a geodemographic segmentation tool for classifying people.

Rental links with other forms of transport

A third of rentals involved collection of a rental car from an airport, with a further 5% being collected from a train station or port. According to operator data, at least 138 rental branches are now located within a mile of a train station.

In terms of getting to or from a rental branch, for 74% of rentals, respondents reported using a non-car mode.

For about a quarter of rentals, respondents said they used the rental car to help them link up with trains, planes or ferries as part of a longer journey. On average, rental customers were walking, cycling and making more frequent use of public transport than the average British driving licence holder.

12% of rental customers owned a public transport season ticket, 3% were a member of a public bike hire scheme and 4% were taking part in lift-sharing.

Three-quarters of non-business renters agreed with the statement that “having vehicle rental as an option enables me to use a variety of types of transport”, with only 6% disagreeing. Of those who felt able to answer, 78% of business users agreed that “having vehicle rental as an option means that employees can make more multi-modal trips (e.g. train and rental car, instead of drive-all-the-way)”, (compared with 4% who disagreed).

A cleaner, more efficient alternative to private car use

Over 70% of rentals involved 2 or more people travelling in the vehicle, with average occupancies of 2.2 people, which is higher than national vehicle occupancy figures.

Nearly three-quarters of rentals were of a small or medium sized car.

Separate operator data indicates that, on average, rental vehicles are considerably newer and cleaner than the UK car fleet as a whole.

For business customers, more than half agreed that their organisation encourages employees to travel efficiently, and to travel together where possible.

Impacts on personal and business car ownership

For both business and non-business users, some customers report buying a vehicle later, owning fewer vehicles or owning a smaller or more efficient vehicle than they otherwise would have done (and the proportions are greater than the proportions reporting the opposite effects).

31% of non-business users reported that their household does not usually have a car (compared to 25% of British households in 2012). In the last 12 months, 14% of non-business users have sold or otherwise disposed of a vehicle which has not been replaced, and 23% report that the availability of rental has made it less likely that they will buy a(nother) vehicle in the next few years, compared with only 12% who say that it is more likely. This net effect of discouraging future vehicle ownership is reported from all areas of the UK, including rural and urban environments.

Two-thirds of non-business renters agreed that “hiring a vehicle (as needed) can have advantages over owning a vehicle” (compared to 12% who disagreed).

Similarly, of those who felt able to answer, 72% of business users agreed that "hiring a car (as needed) can have advantages over having a business fleet", (compared with 4% who disagreed).

Benefits for particular social groups / role in unusual life events

Although not the most common reasons for using rental, it should be noted that there are clearly times when rental provides a vital service for those with particular needs. For example:

- According to the operator data, in 2014, there were nearly 1000 rentals which required a vehicle adaptation in order to accommodate the travel needs of someone with a disability.
- For 95 rentals, one reason given for not using public transport was a driver or passenger with mobility or medical constraints (such as someone elderly or with a disability).
- In terms of journey purpose, 'medical appointment' was mentioned for 26 rentals; transport of goods or property (including moving house or taking a child to university) was mentioned for 60 rentals, and special occasions such as weddings and funerals were also identified.

Rental customers and new mobility models

Renters have a positive attitude to ultra-low emission hybrid and electric vehicles, were they to cost the same as a petrol or diesel alternative. If this was the case, 65% of them would consider using a hybrid or electric vehicle for short trips (less than 50 miles), including about 40% of customers who would consider one of these vehicles regardless of the distance they needed to cover.

Rental customers are considerably better informed about car clubs than the general population. 63% were aware of car clubs or had used them, compared to just 41% of the general population. Nearly 10% of rental customers were either regular users or had used them in the past, making them more than twice as likely to have used car clubs as the average UK adult.

More than one in eight rental customers have taken a 'sharing economy' approach to their transport needs, having used a lift-sharing scheme, made a car sharing arrangement, joined a bike hire scheme or been a customer of a taxi hailing service (e.g. Uber) or a peer-to-peer car sharing service (e.g. BlaBlaCar).

1 Introduction

1.1 Overview

The BVRLA is interested in understanding the social and environmental impacts of vehicle rental. This has led to a number of studies including:

- Discussions with rental companies, to analyse the data they hold about vehicle fleet characteristics and rental customers[2];
- A survey of 3,700 UK personal car rental customers, asking about the effects of rental on their travel choices, undertaken in 2012[3];
- A survey of operators about their operations, discussed further below; and
- Omnibus survey work about the use of rental by the UK population by Taylor Nelson (TNS) in December 2015, also discussed further below.

This report describes the findings from a new survey of personal car rental customers, undertaken between September and December 2015, involving six of the major car rental companies, which built on the 2012 customer survey work. Details of 1,799 rentals were received from 1,691 customers.

1.2 Omnibus data on the scale of rental

Between 15 - 22nd December, an online omnibus survey was conducted by TNS for the BVRLA, surveying a random, representative sample of UK adults aged 18 and over. 2,470 adults were interviewed about their use of car rental in the last year, both in the UK and overseas, including personal rentals for leisure use; personal rentals for work; rentals booked through an insurance company or garage whilst their car was off the road or being repaired; rentals booked through an employer's corporate account; and overseas rentals. Questions referred to personal use, not household use, to avoid double counting. (Questions about attitudes to car clubs were also included.) The data were weighted to reflect the age, gender and regional profile of UK adults to ensure results represented the UK situation.

Overall, 394 people said they had rented a car in the last year. After weighting of results, the implication was that 15.3% of UK adults had made a personal rental in the last year (i.e. excluding those who had only rented as a result of a booking through an insurance company/garage, corporate account or overseas). With 50.9 million adults (aged 18+) in the UK, this suggests **about 7.8 million people rented a car at least once in the UK in 2015 in a personal capacity**.

The omnibus also provided the following findings[4]:

- 93.6% adults claimed that they rented less than 6 times per year;

[2] Cairns S (2011) *Vehicle rental: environmental and sustainability implications.* TRL PPR583

[3] Cairns S and Harmer C (2013) *Rental customer survey 2012.* TRL PPR660

[4] Comparisons with our results suggest that our survey comprises a somewhat higher share of more frequent renters, with a slightly higher share of men, and older age groups. It should be noted that questions were designed to ensure that questions about customer details (as opposed to rentals) were only answered once.

- 47% renters lived in the South; 27% in the Midlands and 26% in the North;
- 62% renters were male; and
- 53% renters were aged 18-34 years old.

Results about car club awareness are discussed in Section 4.4.

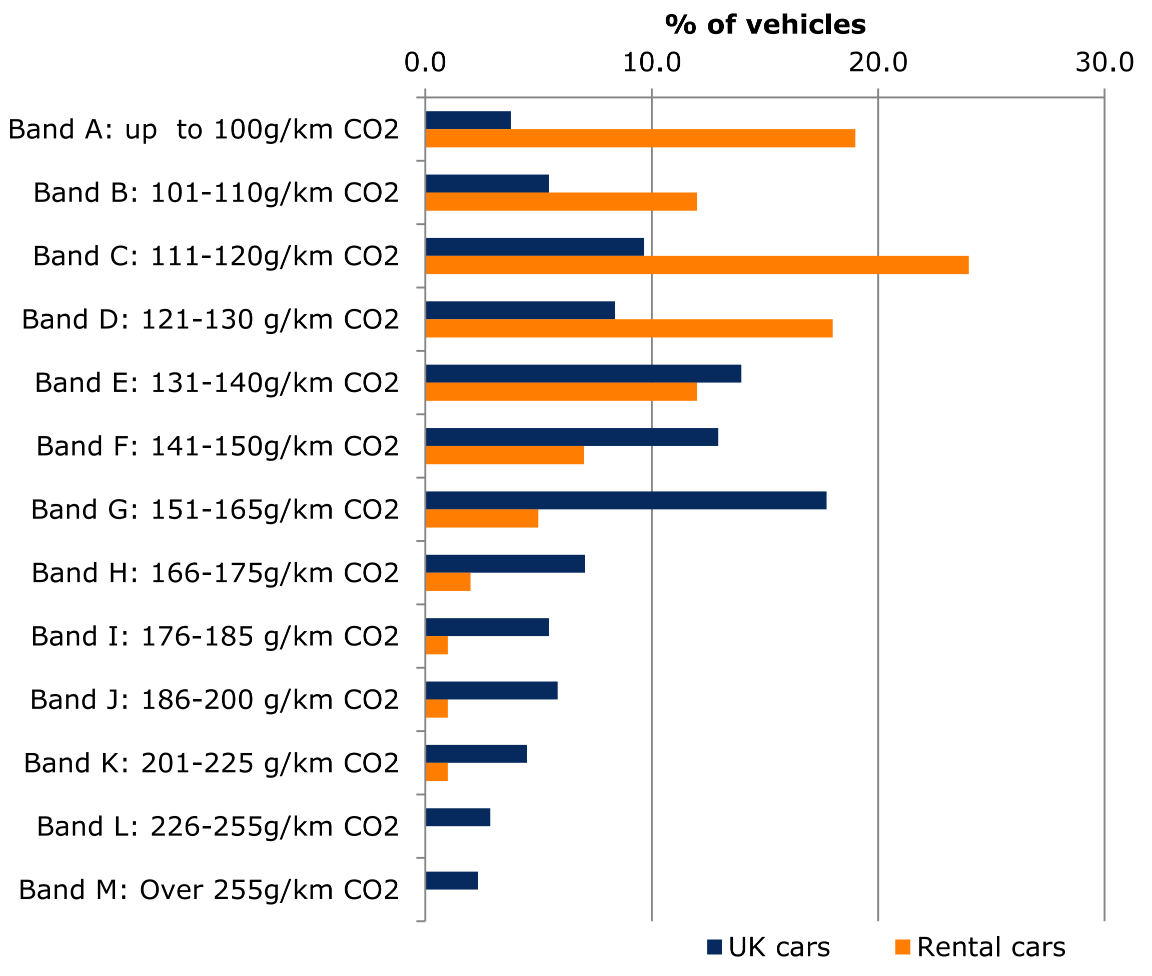
1.3 Operator data about rental operations

In early 2015, operators were asked to provide information about their operations for the previous year (January-December 2014) and/or the characteristics of their vehicle fleet as of 31st December 2014. This built on similar survey work in previous years. Six organisations took part, representing fleets including 144,642 rental cars. According to other data, British rental fleets comprise approximately 320,000 rental cars in total; therefore this survey directly captured data for 45% of the fleet.

Key findings were:

- The rental vehicle car fleet has a higher share of vehicles with relatively low CO_2 emissions, compared to the British car fleet as a whole (as per Chart 1.1).
- According to the operators who were able to provide figures (representing about half the vehicles reported), all cars on fleet as of 31/12/16 met Euro 5 standards for local air pollutants, with 17% meeting Euro 6 standards.
- There were 619 electric and/or hybrid vehicles reported as being on fleet as of 31/12/14 (representing about 0.4% of the total car fleet), an increase compared with 2013 figures.
- The average age of cars on fleet (during 2014) was just over 6 months.
- Nearly 1000 rental transactions for customers requiring a vehicle adaption due to disability took place in 2014.
- Operators reported that 138 rental branches were located within a mile of a train station in 2014.

Chart 1.1: Composition of rental car fleet, compared with the UK car fleet overall



Rental data is for 144,642 cars on the UK fleets of 6 major rental operators as of 31/12/15.

UK data is for licensed cars in 2014, taken from vehicle statistics table VEH0206, excluding the 10% of vehicles with an unknown CO_2 value.

1.4 Methodology for this study

It was agreed at the outset that this research would focus on individual UK car rentals, made by people living in the UK[5].

As such, it does not include:

- People renting vans or minibuses;
- People living overseas (including the Channel Islands and the Isle of Man);

[5] After some consideration, those living (or renting) in the Channel Islands or Isle of Man were taken to be out of scope.

- People renting overseas (including the Channel Islands and the Isle of Man); or
- People booking cars via a corporate account (though those making a personal booking who are intending to use the vehicle for work purposes were deemed to be in scope).

The logic to choosing this sample was that those 'in scope' would all have personal car ownership as a potential alternative choice.

Six of the major car rental companies were involved – namely Arnold Clark, Avis, Enterprise, Europcar, Hertz, and Thrifty, who used a variety of techniques to ask people to participate. As outlined in the acknowledgements, we are very grateful for their involvement in the work.

Inevitably, the representativeness of the final sample is affected by the composition of those who replied. To assess likely skew, results were compared with those from the 2012 survey, and from the omnibus data. These suggest that there are some differences – in particular, a relatively high share of rentals recorded in Scotland. However, the most obvious finding was the similarity of the results with those from 2012. Data are therefore presented as recorded[6].

More details of the survey and the methodology are given in the Appendix of this report.

After the first wave of responses, the survey was reviewed, and some small changes to the wording were made for clarity. (In a few cases, this means that responses before that time needed recoding.) A somewhat more significant change was made to the question about future propensity to rent a hybrid or electric vehicle, as discussed in Chapter 5 where results are reported.

1.5 Structure of the survey

The main structure of the survey is given in the Appendix[7]. In brief, it comprised:

- A main block of questions about the **last rental made** in the UK (1,799 rentals);
- Questions for **all renters** (i.e. those stating that they were answering the survey for the first time) about their consideration of alternatives to vehicle rental (1,691 renters);
- Optional questions about age, gender and postcode for **all renters** answering the survey for the first time (1,691 renters);
- Questions for all **non-business users** - i.e. the subset of all renters whose last rental had not been either partially or completely for business purposes (1,444 renters); and
- Questions for **non-business users** who had used rental more than once (1,305 renters).

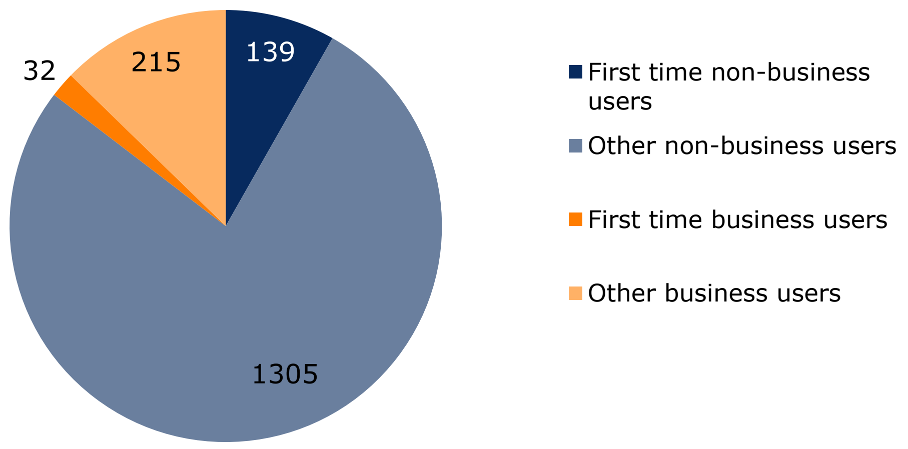
[6] Data weighting did not take place, given the paucity of reliable information on which to base such weighting (including lack of clarity about what would be the most important dimensions on which to weight), and since the similarities with the previous survey work indicate that the broad conclusions drawn are likely to be robust.

[7] The report is structured differently to the survey to maximise clarity.

- Questions for **business users** - i.e. the subset of all renters whose last rental had been either partially or completely for business use (247 renters)
- Questions for **business user**s who had used rental more than once (215 renters)

Chart 1.2 provides a summary of the composition of renters in the survey.

Chart 1.2: Survey composition



1.6 Comparison with other data sources

In this study, where relevant, comparisons are made with other data sources. These include:

- 2014 National Travel Survey for England, and 2010 and 2012 National Travel Survey data for Great Britain, as produced by the Department for Transport[8];
- 2014 population data downloaded from Nomis[9]; and
- Data provided by Experian about their current Mosaic categorisation of the respondents' postcodes (as of January 2015), and their general classification of the UK population.

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[8] https://www.gov.uk/government/statistics/national-travel-survey-2014

[9] https://www.nomisweb.co.uk

2 How do people use car rental?

Key findings

- On average, rental cars have higher occupancies than private cars. Average vehicle occupancy while renting was 2.2 people, which is considerable higher than the average occupancy rate for private cars (which is 1.6 on average and between 1.7 to 1.9 people for the most comparable journey purposes). More than 70% of rental journeys involved two or more people.
- About a third of rental vehicles were picked up from an airport, with most of the others being collected from urban locations.
- Rentals were reported from all regions, with a greater proportion of the rentals being reported from London, the South East and Scotland, partly due to the airports in those locations.
- Nearly three-quarters of rentals were of a small or medium petrol or diesel car.
- Nearly three-quarters of rentals involved the traveller either collecting or dropping off the rental vehicle by a non-car means. Public transport (defined as bus or train), cycling and walking were indicated for getting to or from the rental branch for 45% of the rentals.
- 17% rentals were for one day or less. 55% of rentals were for between 1.5 and five days. Only 16% were for more than a week.

2.1 Where vehicles were collected

The study sought to find out about where people had accessed their rental vehicle. About a third were picked up at an airport; 27% were collected from a branch in London or another major city; 31% were collected from a small city or town and its suburbs; whilst the remaining 9% were collected from a port, train station, rural area or were delivered.

Table 2.1: Where was the rental branch that you picked the vehicle up from?

Answer Choice	Response Percent	Response Total
Airport	33.0%	593
Port	0.4%	8
Train station	4.4%	80
London	8.2%	147
Other major city* and its suburbs	18.8%	338
Smaller city or town and its suburbs	30.7%	552
Rural area	1.0%	18
Vehicle delivered to home or work	2.6%	47
Other (please specify):~	0.9%	16
Total	100.0%	1,799

* For this survey, major cities are defined as: Birmingham, Leeds, Glasgow, Sheffield, Bradford, Edinburgh, Liverpool, Manchester, Bristol, Wakefield, Cardiff, Coventry, Nottingham, Leicester, Sunderland, Belfast and Newcastle upon Tyne.

~Those who responded 'other' either listed specific locations or gave generic descriptions such as 'Rolls Royce site' or 'shopping mall'.

2.2 Geographical distribution of rental locations

The study also generated a geographical breakdown of rental location. As shown in the tables below, rentals were reported from all regions in the UK, with a relatively high share (compared to other regions) for London and the South East, and for Scotland.

Table 2.3 then provides a breakdown of the collection methods by region. From this, it can be seen that a relatively high share of the collections from airports, ports and train stations take place in London, the South East and Scotland, and that, of the very small number of rentals that were delivered to home/work, most deliveries took place in the South or the Midlands.

Table 2.2: In which part of the UK did you collect the vehicle?		
Answer Choice	**Response Percent**	**Response Total**
London*	17.8%	320
South East England (excluding London)	13.6%	244
South West England	9.6%	173
East Anglia	4.2%	76
West Midlands	5.4%	98
East Midlands	5.9%	107
Yorkshire & Humber	5.3%	96
North West England	9.4%	170
North East England	4.0%	72
Scotland	20.2%	364
Wales	2.8%	51
Northern Ireland	1.1%	20
Don't know	0.4%	8
Total	100.0%	1,799

* This includes those who said that the rental branch they collected their car from was in London and those who said that they collected from an airport, train station or port in London (i.e. those answering London to question B1 skipped question B2 when answering, but have been added into the totals).

Table 2.3: Location by numbers and proportions	For collected from rental branch		For vehicles delivered to home/work		For airports, train stations and ports	
	Frequency	Percent	Frequency	Percent	Frequency	Percent
London	319	18.2%	1	2.1%	165	24.4%
South East England (excluding London)	233	13.3%	11	23.4%	90	13.3%
South West England	161	9.2%	12	25.5%	51	7.6%
East Anglia	74	4.2%	2	4.3%	10	1.5%
West Midlands	93	5.3%	5	10.6%	31	4.6%
East Midlands	102	5.8%	5	10.6%	14	2.1%
Yorkshire & Humber	94	5.4%	2	4.3%	17	2.5%
North West England	168	9.6%	2	4.3%	45	6.7%
North East England	70	4.0%	2	4.3%	32	4.7%
Scotland	362	20.7%	2	4.3%	193	28.6%
Wales	49	2.8%	2	4.3%	7	1.0%
Northern Ireland	20	1.1%	0	0.0%	19	2.8%
Don't know	7	0.4%	1	2.1%	1	0.1%
Total	1752	100.0%	47	100.0%	675	100.0%

2.3 Type of vehicle rented

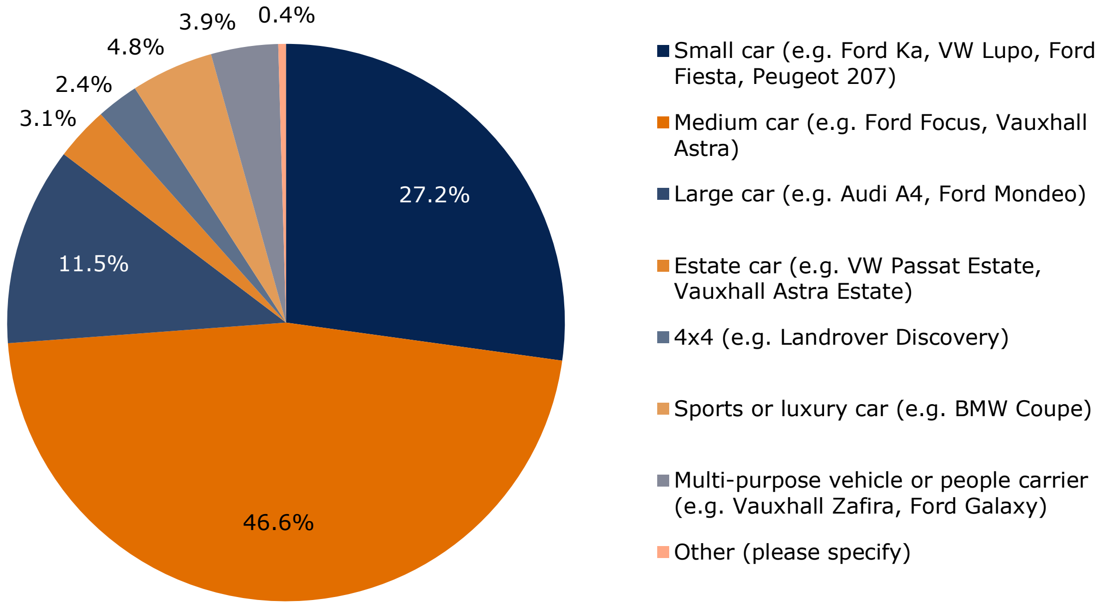
48% of rentals were of diesel vehicles, whilst 50% were of petrol vehicles. A total of seven rentals were of a vehicle using an alternative fuel technology, either hybrid or fully electric[10]. 74% of reported rentals were of small or medium cars. 7% were rentals of a specialist vehicle, such as a sports or luxury vehicle or a 4x4. The remaining 19% were rentals of a large or estate car or a people carrier (with 0.4% of rentals that could not be classified – see chart footnote).

[10] In the survey, examples were provided for the different types of hybrid and electric cars. These were as follows: Plug-in hybrid electric (e.g. Mitsubishi Outlander, Vauxhall Ampera, some models of Toyota Prius); Hybrid electric car that does not need to be plugged in (e.g. some models of Toyota Prius); and Fully electric (e.g. Nissan Leaf, Renault Zoe, BMW i8, VW e-Golf).

Table 2.4: What kind of vehicle did you hire (engine type)?*		
Answer Choice	**Response Percent**	**Response Total**
Petrol	50.0%	899
Diesel	47.9%	861
Plug-in hybrid electric	0.2%	4
Hybrid electric car that does not need to be plugged in	0.1%	2
Fully electric	0.1%	1
Don't know	1.8%	32
Total	100.0%	1,799

* Respondents were asked to answer for the rental vehicle used, rather than booked, if there was a difference.

Chart 2.1: What kind of vehicle did you rent (vehicle type)?

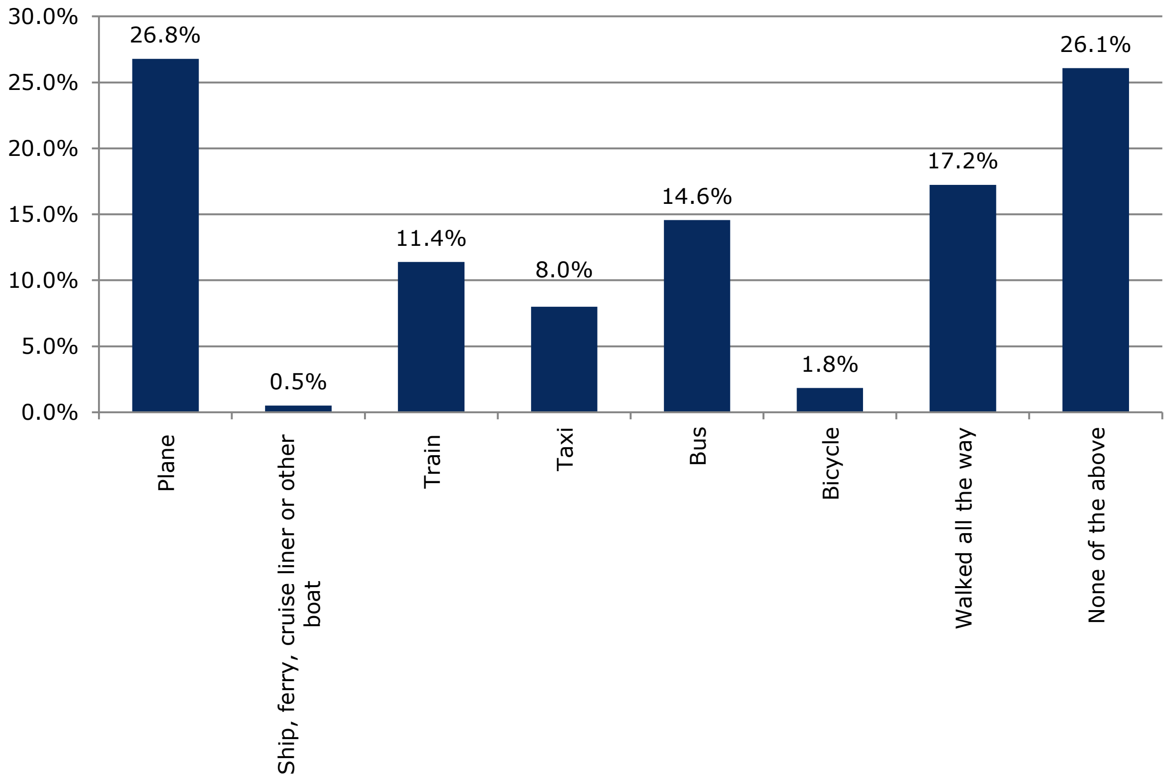


*In many cases, people replying 'other' and giving a vehicle type were re-coded into the appropriate category. Of the 8 remaining 'other' responses, most gave an ambiguous response, such as 'Audi A1', which could potentially be classified into several different rental types without more information. One respondent provided a response of a different nature ('dual control').

2.4 Travel to and from the rental branch

Respondents indicated that they used a wide variety of means to get to or from the rental branch where they collected, or dropped off, their rental vehicle. In particular, 74% indicated that they used a non-car mode for at least one of these journeys. Public transport (defined as bus or train), cycling and walking were indicated for 45% of the rentals.

Chart 2.2: Did you use any of these forms of transport either to pick up your rental vehicle, or to travel onwards after dropping it off?*~



*The category '*none of the above*' covers those that would have used car transport, either as a passenger or as a driver.

~Percentages given indicate the proportion of people providing that response for their rental. Participants were able to tick more than one option (with the exception of 'none of the above'), such that the total is not 100%.

2.5 Duration of the rental

About 17% of rentals were for one day or less. 35% were for 1.5 to 3 days, with 20% lasting 4-5 days, and remaining 28% lasting longer than that, although only about 15% lasted longer than a week, and 5% lasted longer than 2 weeks.

Table 2.5: What was the approximate duration of the rental period?*

	Response Percent	Response Total
Less than 1 day	4.6%	82
1 day	12.6%	224
1.5 - 3 days	34.8%	621
4 - 5 days	20.3%	363
6 - 7 days	12.4%	221
8 - 14 days	10.1%	181
15 – 31 days	4.4%	79
Longer than 1 month	0.7%	13
Total	100.0%	1,784

* This excludes 15 respondents who gave an incorrect or no response.

Respondents were asked to give either a number of hours, or number of days. 'Less than 1 day' corresponds to 1-23 hours. 1 day corresponds to 24 hours.

2.6 Vehicle occupancy

Only 28% of rentals typically involved just one person in the car. About 72% involved 2 or more people, and, for a further 0.6%, vehicle occupancy was 'too variable to specify'.

Excluding those who responded 'too variable to specify', and treating 5+ as 5, the average vehicle occupancy of this sample was 2.2 people.

According to 2014 National Travel Survey data (Table NTS 0905), 61% car/van driver trip stages in England were made as single occupancy journeys, and average vehicle occupancy was 1.59. According to Table NTS0906, this does vary by trip purpose, though only increasing to an average occupancy of 1.9 for holidays/day trips (43% single occupancy), and 1.7 for 'leisure' (or 54% single occupancy), where leisure is defined as 'visiting friends at home and elsewhere, entertainment and sport'. (These are the most commonly mentioned reasons for renting in our survey – see Chapter 4).

Table 2.6: During your rental, how many people were typically travelling in the rental vehicle?
(i.e. including the driver, what was the typical number of people in the party using the car).

Answer Choice	Response Percent	Response Total
1	27.8%	501
2	42.5%	765
3	14.2%	256
4	11.3%	204
5+	3.5%	63
Too variable to specify	0.6%	10
Total	100.0%	1,799

3 Why do people use car rental?

Key findings

- Car rental is used by people that don't own cars - more than a third of rentals occurred because the household didn't have any vehicles. For a further 25% of rentals, respondents said that they used a rental car because their household vehicle was not available (e.g. being repaired or being used by someone else) or not suitable (e.g. too small, too large or of insufficient quality). For another quarter, car rental was chosen because travellers wanted to link-up with a plane, train, ferry or other travel options.
- Car rental is used for a wide variety of reasons. The top three reasons given for renting a car were to visit family or friends; for a holiday; or for a day trip or special occasion (e.g. a wedding).
- 'Convenience and flexibility' was the most common reason for renters not using public transport - it was cited for nearly two-thirds of rentals. The other most commonly cited reasons for choosing rental over public transport on the occasion of the last rental included having multiple stops/complex journey patterns; transport of luggage or other bulky items; more than one person travelling; and travel time. For 95 rentals, a driver or passenger with medical or mobility constraints was mentioned.

3.1 Introduction

Understanding 'why' people use rental is complex, as motivation can be explained in a diverse range of ways – e.g. I didn't have a car; I needed to get to a meeting; I had lots of things to carry; the train was very expensive etc. To try to address the issue, we asked a series of questions about people's last UK car rental relating to:

- Why a personal vehicle was not used;
- The purpose of the rental journey; and
- Why rental was chosen in preference to using public transport.

Each of these topics is discussed further below. Chapter 5 then provides further insights into how far people consider rental in conjunction with other transport options.

For most of the questions in this section, people were able to select more than one option (since people often have more than one reason for doing things). Hence, results are presented in two ways – first, indicating the numbers and proportions where the option was selected at all, and second, indicating the numbers and proportions where that option only was selected.

Once again, this chapter discusses the results for all 1,799 rentals (the whole sample).

3.2 Use of rental in preference to a personal vehicle

In terms of why a household vehicle was not used, instead of renting, the most commonly mentioned reason (for about a third of rentals) was a lack of household vehicles. The household vehicle being unsuitable or unavailable (not least due to break down or repairs) was mentioned for just over a quarter of rentals. The other most common reason was to link with a plane, ferry or train, mentioned for about a quarter of rentals, mostly in association with travel within the UK, rather than as part of an overseas trip. For 94% rentals, respondents provided only one reason.

Table 3.1: Why did you hire a vehicle instead of using a household vehicle?*

	Numbers where that purpose was reported		Numbers where ONLY that purpose was reported	
Answer Choice	**Response Percent**	**Response Total**	**Response Percent**	**Response Total**
Household does not have any vehicles	33.2%	597	32.0%	576
Household vehicle(s) broken down/being repaired	8.5%	153	8.2%	147
Household vehicle(s) not available as being used by other household member or someone else	8.7%	157	7.5%	135
Household vehicle not suitable for purpose (e.g. too small or too large)	12.0%	215	9.6%	172
Household vehicle not of sufficient quality or status	4.3%	77	2.8%	51
To link with plane, ferry, train etc. as part of travelling overseas, or returning from abroad	7.1%	127	6.2%	111
To link with plane, ferry, train etc. as part of travel within the UK	18.2%	327	17.1%	308
One-way trip (but not linking with another form of travel)	1.4%	25	1.2%	21
To test drive a particular type of car	1.6%	29	0.6%	10
Work policy for business travel	3.1%	56	2.4%	44
To reduce wear-and-tear or mileage on a household vehicle	4.4%	79	2.8%	51
Other (please specify):	5.9%	107	3.6%	65
Mixed Reasons	N/A	N/A	6.0%	108
Total	-	1,949	100.0%	1,799

* (By household vehicle, we mean a car or van available for use by your household, including a company car, if relevant.)

Respondents were asked to indicate 'all that apply' so some have provided more than one response, meaning that the percentages in the first column do not add to 100%.

Reasons given in the 'other' category varied in nature and often related to the purpose of the trip. These included:

- Being in an unusual location, such as on holiday or visiting people, and needing supplementary transport. This was mentioned by 27 people, including two who were on holiday in a motorhome.
- Issues relating to household car availability, such as being in between cars – mentioned by 5 people; having a motorbike as the household vehicle – mentioned by 2 people; only having a company car – mentioned by one person; household vehicle being stolen – mentioned by 1 person; because of insurance – mentioned by one person; and to replace a household vehicle – mentioned by one person.
- Using for work, including getting to work and to present a good business image – mentioned by 3 people.
- Needing to transport people for a wedding or funeral– mentioned by 7 people.
- Only being in the UK part-time, relocating, or working away from home for part of the week – mentioned by 3 people.
- As a treat (e.g. for a birthday) – mentioned by 1 person.
- Because of a short-term change in plans – mentioned by 1 person.
- Because they rent all their vehicles- mentioned by 2 people.

Examples of reasons given were:

> *"I injured my left knee and needed to drive an automatic for a trip to visit family for Christmas".*

> *"I was on Ulsterbus coach tour to Newquay and I wanted to see places not on tour itinerary e.g. Port Isaac where Doc Martin is filmed".*

3.3 Purpose of rental trips

The second question about motivations asked about the purpose for which the rental vehicle was used. The results are shown below. A much higher proportion of the sample – 29% – gave more than one main purpose for renting the car.

The most common purposes for renting were the same when looking at either those who gave several 'main purposes' for their rental, or those who indicated that it was the only purpose. Specifically, the most common purposes were:

- Visiting family/friends (37% main purpose; 18% only purpose);
- Holidays/tourism (31% main purpose; 18% only purpose);
- Day trips or other leisure activities including special occasions (20% main purpose; 8% only purpose);
- General activities (16% main purpose; 7% only purpose); and
- Work travel for business (16% main purpose; 12% only purpose).

Table 3.2: Please indicate the main purpose(s) that you used the rental vehicle for:				
	Numbers where that purpose was reported		Numbers where ONLY that purpose was reported	
Answer Choice	**Response Percent***	**Response Total**	**Response Percent**	**Response Total**
General activities (as short-term replacement for unavailable household vehicle)	16.0%	288	6.9%	125
Linking to another means of transport (e.g. train, plane, ferry, ship etc.)	8.7%	157	3.7%	67
Work travel - for business meetings and/or other business purposes	15.5%	279	11.5%	207
Work travel - commuting to your main workplace	4.8%	86	1.7%	31
Holidays/tourism	30.9%	555	17.6%	316
Visiting family or friends	37.2%	669	18.0%	323
Day trips or other leisure activities, including special occasions (e.g. wedding, funeral)	20.5%	369	7.7%	138
Education (including escorting children to school or local college)	1.5%	27	0.7%	12
Shopping	7.9%	143	0.1%	1
Transport of goods or property (e.g. moving house or taking child to university)	3.3%	60	1.8%	33
Medical appointment	1.4%	26	0.6%	11
Other (please specify):	0.7%	12	0.7%	12
Mixed reasons given	N/A	N/A	29.1%	523
Total		2,729	100.0%	1,799

*Percentages in the first column indicate the share of rentals for which that option was chosen, as a proportion of all rentals. Participants were able to tick more than one option, such that the total is not 100%.

Responses in the 'other' category included:

- Returning home from a different location (4 people);
- Main way of accessing cars (2 people);
- House hunting (1 person);
- One way travel to collect a new car (1 person);
- To teach driving (1 person);
- Driving after a long break (1 person); and
- Everyday living and activities (2 people).

3.4 Use of rental in preference to a public transport

People were also asked why they had rented a vehicle instead of using public transport. 45% gave more than one reason. Unsurprisingly, 'more convenient/flexible' came out as the top choice for 63% of rentals, although it was only given as the exclusive reason for 26%. Meanwhile, the other most common reasons given were:

- Multiple stops or complex travel patterns (34% main reason; 11% only reason);
- Luggage or other bulky items to transport (25% main reason; 5% only reason);
- More than one person travelling (23% main reason; 3% only reason); and
- Travel time (24% main reason; 2% only reason).

Notably, for 95 rentals, a driver or passenger with mobility or medical constraints (such as an elderly person or someone with a disability) was given as a reason for renting.

Table 3.3: For your last rental, please indicate the main reason(s) you used rental instead of public transport.

	Numbers where that reason was given		Numbers where ONLY that reason was given	
Answer Choice	**Response Percent**	**Response Total**	**Response Percent**	**Response Total**
More than one person travelling	23.2%	417	2.7%	48
Luggage or other bulky items to transport	25.0%	450	4.7%	84
Multiple stops / complex travel patterns	33.7%	607	10.5%	188
Problems with getting to public transport at the beginning of a journey	8.2%	147	1.0%	18
Problems with using public transport for the end of a journey	13.4%	241	1.7%	31
Cost	17.1%	308	1.7%	31
Travel time	23.8%	428	2.3%	41
More convenient/flexible	62.6%	1127	25.7%	462
Driver or passenger with mobility or medical constraints (e.g. someone elderly or with a disability)	5.3%	95	1.7%	31
Other (please specify):	4.4%	79	3.0%	54
Mixed Reasons	N/A	N/A	45.1%	811
Total		3,899	100.0%	1,799

*Percentages given indicate the proportion of people providing that response for their rental from the total sample. Participants were able to tick more than one option, such that the total is not 100%.

In terms of the 'other' comments reported in relation to this question, the following responses were received (many of which overlap with reasons mentioned in other sections). Specifically, they include:

- Issues relating to the availability of public transport, such as no public transport being available (5 people) or being too infrequent (3 people), engineering works or train strikes (2 people), and a dislike of using public transport (3 people);
- Requiring transport for a holiday (12 people) or for recreation and leisure purposes (2 people);
- Needing transport for a treat or a special event such as a wedding (5 people);
- Requiring a car for a long duration (1 person) or to travel a long distance (3 people);
- Being able to run errands or for personal business such as transporting family or going to the hospital (5 people);
- Renting a vehicle to replace a car being repaired (2 people), to use as a second car (1 person), or because there is no household car (2 people); and
- Using the vehicle to teach driving (2 people).

Other reasons included insurance (1 person), testing a vehicle (1 person), company paid (1 person), needing to get to an airport at short notice (1 person) and always renting cars (2 people).

Examples of some of the comments made include:

> *"I rent instead of buying a car because of area I live in."*
>
> *"There was due to be a train strike (which was cancelled at the last minute)."*
>
> *"Take bride to registry office then bride & groom to reception."*
>
> *"Needed to get to Manchester airport at short notice."*
>
> *"Need to visit sick relatives en route."*

4 Attitudes to alternative transport options

Key findings

- 62% of renters said that they chose rental having considered the relative suitability of other options – including public transport, personal car use and taxi use. Business users were slightly more likely to consider rental as part of a range of options.
- Rental customers have a positive attitude to ultra-low emission rental vehicles, were they to cost the same as a petrol or diesel alternative. If this was the case, 65% of them would consider using a hybrid or electric vehicle for short trips (less than 50 miles), including about 40% of customers who would consider one of these vehicles regardless of the distance they needed to cover.
- Rental customers are considerably better informed about car clubs than the general population. In our survey, 63% were aware of car clubs or had used them, compared to just 41% of the general population. Nearly 10% of those answering our survey were either regular users or had used them in the past, making them more than twice as likely to have used car clubs as the average UK adult.
- 12% of rental customers owned a monthly or annual public transport season ticket, and more than one in eight rental customers had taken a 'sharing economy' approach to their transport needs, having used a lift-sharing scheme, made a car sharing arrangement, joined a bike hire scheme or been a customer of a taxi hailing service (e.g. Uber) or a peer-to-peer car sharing service (e.g. BlaBla Car).

4.1 Introduction

Having completed the questions about their last rental, all respondents were asked whether they had completed the survey before. 1,691 respondents indicated that they had not done so.

Respondents were then asked separate blocks of questions, depending on whether business travel was partially/completely their reason for using rental. The results for these two sub-samples are given in Chapters 6, 7 and 8.

All 1,691 respondents were then asked about consideration and use of alternative transport options to either rental or mainstream car use, as reported below.

4.2 Consideration and use of alternative transport for recent rental

First, as another insight into how people choose rental, the respondents were asked two, linked questions. The first aimed to understand whether rental is a first choice, an option of last resort, or considered in conjunction with other options. The second aimed to understand what other options were considered on this occasion.

The general picture is that about a third of renters choose rental without considering any other options, whilst about 62% choose to use rental having decided other options are less suitable. Few see it as their choice of last resort. Where people chose to provide their own statement, a general theme was that other options weren't considered because they were known to be unsuitable to start with. For example, comments included:

> *"Travel to a remote part of Scotland is only possible with a rental car. A taxi is far more expensive and the distance from home and the household car is almost 800 miles. We use plane or train for most of the journey but a car is the only option for the Scottish part of the journey."*

> *"Although I live in a market town, the transport links to where I need to go, both locally and within the UK, fail to be of any use at all. A car is really the only option."*

> *"Seasonally, a motorcycle is a bit soggy. Hence rental."*

> *"We share one household car between adult daughter and parents, which is less cost than owning two cars. To allow freedom of travel on the few occasions when we require two cars, we have no other option but to hire."*

When asked about the specific alternative options considered for their last rental, the proportion of respondents providing a specific answer dropped to 54%. Our assumption is that the reason for this is that, for that particular rental, respondents assumed they were already sufficiently well informed that the other options would be less suitable, and therefore did not give them serious consideration.

For those that did consider other options, the most popular choices were:

- Public transport (81%);
- Own car (26%); and
- Taxi (14%).

30% considered more than one alternative option.

Responses from business users were largely similar to those who had not rented for business purposes, although business users were somewhat more likely to consider a other options, and a wider range of options, before choosing rental.

Table 4.1: Please indicate which statement is most true for your most recent rental:						
	Non-business Users		Business Users		All Users	
Answer Choice	**Response Percent**	**Response Total**	**Response Percent**	**Response Total**	**Response Percent**	**Response Total**
I did not consider any other transport options.	32.4%	468	30.0%	74	32.1%	542
I chose to use vehicle rental on this occasion, having decided that other transport options were less suitable.	61.6%	889	64.0%	158	61.9%	1047
I would have preferred to use another transport option and used vehicle rental as a last resort.	3.5%	51	5.3%	13	3.8%	64
None of the above. (Please provide a comment giving a more accurate statement.)[11]	2.5%	36	0.8%	2	2.2%	38
Total	100.0%	1,444	100.0%	247	100.0%	1,691

[11] Looking at the comments provided for responses of 'none of the above', the majority seem to correspond with a response similar to 'I did not consider any other transport options, because I feel I already knew they were unsuitable'. As this is different to not considering any alternative options, the decision was made at the data analysis stage not to reclassify these responses.

Table 4.2: What other transport modes did you consider before renting a vehicle for this journey?[12]						
	Non-business Users		Business Users		All Users	
Answer Choice	Response Percent*	Response Total	Response Percent*	Response Total	Response Percent*	Response Total
Public transport (train/bus/coach)	80.5%	594	85.1%	131	80.9%	733
Own car	25.5%	188	28.6%	44	26.4%	239
Company car	0.5%	4	6.5%	10	1.5%	14
Plane	7.5%	55	9.7%	15	7.7%	70
Taxi	12.9%	95	20.1%	31	14.0%	127
Cycling/walking (only)	3.9%	29	1.9%	3	3.5%	32
Other (please specify):	2.4%	18	1.9%	3	2.5%	23
Total respondents		738	-	154	-	892
More than one alternative considered	27.4%	202	40.3%	62	29.6%	264
Only one alternative considered	72.6%	536	59.7%	92	70.4%	628

*Percentages given indicate the proportion of people providing that response for their rental. Participants were able to tick more than one option, such that the totals for each option are not 100%.

In terms of the 'other' comments reported in relation to this question, the following responses were the main alternative option considered:

- Lift sharing, or getting a lift from family or friends – mentioned by 10 people; and
- Car clubs or carpooling – mentioned by 4 people.

Other options included being picked up by a third party (1 person), using their motorbike (2 people), using a van and/or removal company (2 people) and staying in a hotel (1 person).

[12] These samples exclude 468 non-business users and 74 business users who indicated previously that they did not consider any other transport options, together with those who responded 'none of the above' (36 non-business users and 2 business users). For those who indicated that they chose to use vehicle rental on this occasion, having decided that other transport options were less suitable, 202 non-business respondents and 15 business users went on to say 'none' when asked next what other modes they did consider. 2 of the 13 business users who indicated that they would have preferred to use another transport option and used vehicle rental as a last resort also did so. These 219 respondents have therefore also been removed from the analysis in this table.

The following comments were also provided:

"Family car wasn't suitable to carry the people and disability equipment we needed to carry."

"Physical problems mean I need a car to leave the house."

"Purchase to use for long distance and holidays only."

4.3 Interest in hybrid and/or electric vehicles

Although only 7 rentals of hybrid or electric vehicles were captured through the survey, other work by BVRLA suggests that the availability of such vehicles on rental fleets is increasing, with the operator survey suggesting that they currently constitute about 0.4% of rental fleet cars. Therefore, there was considerable interest in the views of existing rental customers about such options.

A summary of responses is shown below. For the sample as a whole, only about 10% of the sample could not envisage renting an electric or hybrid vehicle; 11% were unsure of their views; whilst the majority (79%) would consider doing so. This is the one question on the survey which was changed after review in October 2015, given that comments stressed the importance of rental distance in customer thinking. The two phases of results are presented separately for clarity.

4.3.1 Phase 1 question

In the initial wording, renters were explicitly asked 'yes, for my next rental' (with the other option being phrased as 'yes, within the next five years'). The proportion choosing 'yes, for my next rental' was 44%, with 12% saying 'yes, within 5 years'. In this version of the question, the share answering 'not sure' was much higher.

Table 4.3: PHASE 1 QUESTION: If it cost the same as a petrol or diesel rental vehicle, would you consider renting a hybrid or electric vehicle for a future rental? (Examples include: Nissan LEAF, BMW i3, Toyota Prius, Vauxhall Ampera)

	Non business users		Business users		Total	
	Response Percent	Response Total	Response Percent	Response Total	Response Percent	Response Total
No, never	11.5%	25	11.8%	2	11.5%	27
Not sure	34.1%	74	17.6%	3	32.9%	77
Yes, for my next rental	41.9%	91	64.7%	11	43.6%	102
Yes, within the next 5 years	12.4%	27	5.9%	1	12.0%	28
Sample	100.0%	217	100.0%	17	100.0%	234

Comments included:

> *"Mileage range isn't good enough & in rural Scotland not many charging points. Cars look ugly."*
>
> *"Subject to range in excess of 200 miles."*

"Apart from cost, the main consideration for me is range - the Leaf does not go far enough on a charge."

"Journey typically 200 miles so range may be an issue."

"I would worry about refuelling points so would probably end up just using the petrol/diesel."

"Any consideration of renting an electric vehicle would depend largely on the availability of recharging facilities at and on the way to/from destination."

"Would depend on requirements. i.e. city driving."

4.3.2 Phase 2 question

In the subsequent re-wording (not least as a result of comments provided), this option was changed to be:

- Yes (if my rental was for travel of less than 50 miles) – 26% respondents;
- Yes (regardless of rental distance) – 39% respondents; and
- Not now, but can imagine doing so within the next 5 years – 18%.

This indicates the strong levels of support for trying such vehicles. In both survey waves, about 40% respondents indicated that they would consider a rental vehicle (regardless of distance), with the second wave suggesting that this would extend to 65% respondents if the rental was for travel of less than 50 miles.

Table 4.4: PHASE 2 QUESTION: If it cost the same as a petrol or diesel rental vehicle, would you consider renting a hybrid or electric vehicle for a future rental? (Examples include: Nissan LEAF, BMW i3, Toyota Prius, Vauxhall Ampera)

	Non business users		Business users		Total	
	Response Percent	Response Total	Response Percent	Response Total	Response Percent	Response Total
No, never	8.6%	105	12.6%	29	9.2%	134
Yes (if my rental was for travel of less than 50 miles)	25.1%	308	32.2%	74	26.2%	382
Yes (regardless of rental distance)	40.1%	492	33.9%	78	39.1%	570
Not now, but can imagine doing so within the next 5 years	18.2%	223	16.1%	37	17.8%	260
Don't know	8.1%	99	5.2%	12	7.6%	111
Sample	100.0%	1227	100.0%	230	100.0%	1,457

Similarly to respondents to the Phase 1 question, the main issues highlighted within the comments related to distances being travelled, the availability of charging points and information about charging point location. Some respondents also expressed a lack of knowledge about how they work, or had particular views about the relative benefits of different options:

"I would probably consider renting a hybrid vehicle if the range was at least the same as present day cars."

"Range would be a concern for travel outside London."

"Tend to travel long distances so they are currently impractical."

"I would need to be persuaded with detailed information on range and recharging points."

"Dependent on vehicle range, distance required to travel, and availability of charging points on route / at destination."

"I am concerned that distances that I travel are not entirely suitable for electric vehicles due to range and I am equally concerned that the UK may not have enough electricity if electric car usage and demands on the supply increase dramatically."

"Very happy to use plug-in hybrid, but charging infrastructure is too sparse."

"Availability of battery charge in Scotland out [of] the central belt would have to be much better for longer rentals / holidays."

"I would require information on usage, recharging, how to recharge, where etc. before feeling confident about hiring."

"Would be happy to see a discount for saving the environment."

"Our household vehicle is a Nissan Leaf so we hire vehicles when we need to travel any distance."

"[Would] be much keener to rent hybrid vehicles due to lower environmental impact and fuel cost."

"I would only use a hybrid for a short distance but if the journey was for less than 50 miles, I would use my own household vehicle rather than hiring a car."

"Only if a Tesla, which benefits from range and rapid charging on the supercharging network."

"If performance was not hindered (i.e. if it was sporty)."

4.4 Interest in car clubs

Two questions were asked about car clubs, aimed at assessing current levels of knowledge about them, and, separately, levels of interest in them. The first question was also asked in the UK omnibus survey (mentioned in the introduction), with comparative results given below. Key findings are as follows:

- 37% of rental customers in our survey have not heard of car clubs, compared with 59% for the general population (and 34% of renters in the omnibus survey).
- According to our survey, 26% of renters are relatively well-informed about them, and a further 10% are either previous or active users. In contrast, only 9% of the UK population feels relatively well-informed, with 5% reporting current or previous use. (Omnibus results for renters also showed higher levels of knowledge and use of car clubs than for the general population.)

- 34% of rental customers reported that they are quite, or very, interested in making (more) use of a car club service. Of these 572 people, 465 (equivalent to 81%) are not current or previous users of a car club scheme. So overall, 37% of the sample either have used a car club in the past, are currently doing so, or have not previously used them but are interested in doing so.

Table 4.5: We are interested in your views on car clubs, such as Zipcar, CityCarClub, DriveNow or Hertz 24/7, where you can rent a vehicle parked in a local neighbourhood by the minute or the hour.

Which of the following statements is most appropriate for you?

			Omnibus results	
Answer Choice	**Response Percent**	**Response Total**	**About the UK population**	**About UK renters**
I have not heard of them.	37.0%	625	59%	34%
I know something about them but do not feel well informed about what they offer.	27.1%	458	27%	31%
I am relatively well-informed about them but have never used them.	26.3%	445	9%	18%
I am relatively well-informed about them and have used them in the past.	5.5%	93	3%	10%
I am relatively well-informed about them and am currently an active user of them.	4.1%	70	2%	7%
Total	100.0%	1,691	100%	100%

Two common themes stood out from the comments provided by respondents of the survey.

First, people thought that car clubs were more useful or appropriate in an urban setting and for shorter journeys. Comments included:

> *"Great idea for urban dwellers but not an appropriate solution in the rural setting."*
>
> *"Our son and daughter-in-law used to live in London and regularly used a car club. They found it very useful."*
>
> *"I live in a rural area; opportunity to use would be limited."*
>
> *"Car clubs a good idea for cities as I don't see the need for anyone to have a car in a city with their good public transport links. Impossible in all other areas though."*
>
> *"We mainly use our car for longer distance travel to visit friends and relatives so this would not be helpful."*

Second, people thought that renting a car was less expensive than a car club. Comments included:

> *"I considered car clubs in the past when I had better availability but found them too expensive compared to an ordinary hire car. (About three hours cost as much as a day)."*

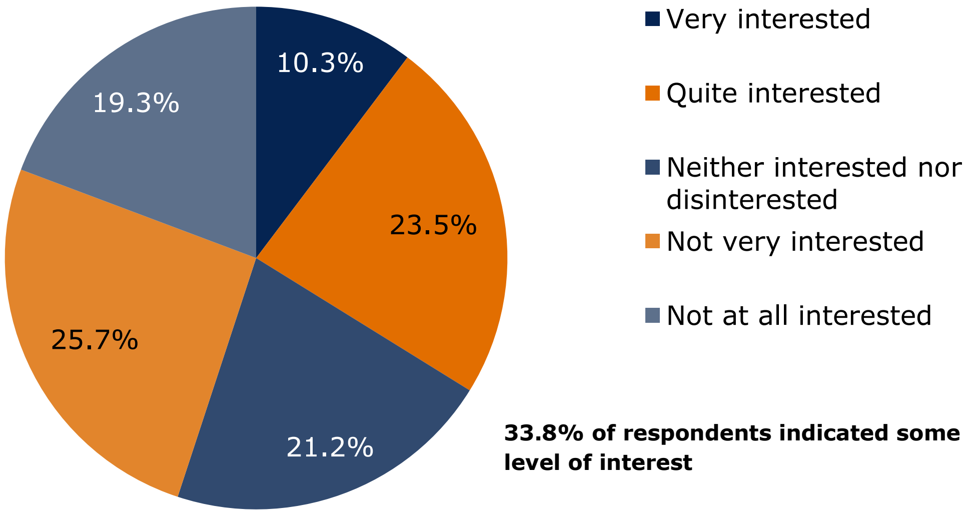
> *"The only option that I researched in detail was very expensive compared to conventional car rental rates if more than 1 hour total rental was required."*

> *"These are useful services, but a little pricey. I expect that the services will have to contract soon because they are not that well used in this area."*

> *"Car club cars work out expensive due to the charges being high, for example, visiting friends or a show. They need to have A to B rentals i.e. not charging at destination, or a reduced or no charge whilst parked at destination."*

> *"The cost is crazy. I can rent a Ford Focus for the whole weekend for £45 and put in £7 petrol. Joining the car clubs and booking the car for 1 hour or 2 hours is not cost effective. If it was about £5 an hour with no monthly fee, I might consider it."*

Chart 4.1: How interested would you be in making (more) use of a car club service?



4.5 Use of other transport options

Finally, all respondents were asked about their use of various other transport options – including owning a public transport season ticket, membership of a public bike hire scheme; use of lift sharing (either formal or informal) and use of other innovative options such as Uber.

80% of respondents reported that they were not a member or user of any of those options. However, 20% were, including 12% who owned a public transport season ticket, 6% who had used options like Uber; 3% who were a member of a public bike hire scheme; and 4% who were in a regular car sharing arrangement.

Table 4.6: Are you currently a member or user of any of the following?		
Answer Choice	**Response Percent**	**Response Total**
A member of a lift-sharing scheme, including either a public or workplace-based scheme (such as Liftshare)~	1.3%	22
An informal car-sharing arrangement (i.e. regularly making a work, education or other journey with a non-family member)~	3.2%	54
A member of a public hire bike scheme (such as the London Cycle Hire)	3.2%	54
An owner of a public transport season ticket (monthly or annual)	11.5%	195
A user of other innovative ways of accessing cars, such as Uber or a peer-to-peer car rental scheme such as Bla Bla Car	5.8%	98
OR		
None of the above	79.6%	1,346
Total	-	1,769

*Percentages given indicate the proportion of people providing that response for their rental. Participants were able to tick more than one option, such that the total is not 100%.

~ 6 respondents indicated that they were a member of both a formal and an informal car sharing arrangement. Consequently, the number indicating that they were a member of either was 70 people, 4.1% of respondents.

5 Travel choices of non-business renters

Key findings

- 37% of rental customers drive a car less than once a week. On average, rental customers walk, cycle and make more frequent use of public transport than the average British driving licence holder.
- 31% of respondents reported that their household does not usually have a car (compared to 25% of British households in 2012).
- 14% respondents had sold or got rid of a car in the last 12 months (that had not been replaced).
- 23% of respondents reported that they were less likely to buy a(nother) car in the next few years as a result of the availability of rental (compared to 12% who said they were more likely to do so).
- Looking at the annual mileages reported for the primary household car, rental respondents reported a relatively high proportion of both low mileage (up to 1000 miles p.a.) and high mileage (15,000+miles p.a.) vehicles.
- Two-thirds of respondents agreed with the statement that hiring a vehicle (as needed) can have advantages over owning a vehicle, and three-quarters agreed that it "enables me to use a variety of types of transport". 23% agreed that they would consider sharing a car rather than owning one, while 24% agreed that they tried to limit their car use for the sake of the environment.
- 10% respondents were renting for the first time; 68% had rented less than 6 times in the previous year; whilst 22% had rented 6 or more times during that period. Non-car owners were more likely to be renting frequently.
- Respondents who had rented in the past were asked about the effects of rental on their decision making. For simplicity, key findings are reported as a net effect (i.e. the combined effect of those reporting opposite impacts). Specifically:
    - 9% of respondents felt rental had affected the timing of vehicle purchasing, with a net effect of 7% reporting later vehicle purchasing.
    - 14% of respondents felt rental had affected the number of vehicle owned, with a net effect of 8% reporting fewer vehicles owned.
    - 16% of respondents felt rental had affected the type of vehicles owned, with a net effect of 3% reporting ownership of a smaller or more efficient car.
    - 25% of respondents felt that rental had affected the amount of driving that they do, with a net effect of 5% reporting driving more.
    - Non-car owners were considerably more likely than car owners to report owning fewer vehicles and, separately, driving more.

5.1 Introduction

From the sample of 1,799 rentals, 81 people said that they either had filled in the questionnaire before or were not sure. Consequently, they were directed to the end of the survey, and excluded from any further questions. Another 274 respondents identified business travel as at least one of their reasons for renting and therefore skipped this section. Instead, they completed a section of questions about business travel analysed in Chapter 8.

This section is therefore based on a sample of 1,444 responses, from people who were answering the survey for the first time, and who did not use their rental for business travel. This block of questions primarily focused on their travel behaviour, and the impacts of rental on their travel choices.

5.2 Trip making behaviour

In terms of general travel behaviour, the 1,444 non-business users were asked how often they made a trip by a number of different types of transport.

The subsequent table provides an indication of how these results compare with typical results for licence holders in Great Britain. It is notable that for all non-car modes, a relatively high proportion of rental customers use them at least once per week, and that 37% of rental customers report that they do not drive a car at least once per week.

Table 5.1: Approximately how often do you make a trip by each of these types of transport?

Answer Choice	3+ trips a week	1-2 trips a week	Once a month or more	At least once a year	Less than once a year	Don't know	Response Total
Driver (all cars or vans)	777	119	247	234	40	27	1,444
Passenger (all cars or vans)	224	332	438	249	129	72	1,444
Ordinary bus (i.e. not express buses or coaches)	239	156	262	286	434	67	1,444
Train	139	94	388	485	292	46	1,444
Underground, metro or other tram	168	82	239	395	468	92	1,444
Taxi or minicab	36	109	428	482	319	70	1,444
Bicycle	152	85	147	145	725	190	1,444
Walking for 20 minutes or more without stopping	739	325	231	46	54	49	1,444

* This question counted a return journey as 2 trips.

Table 5.2: General comparison - approximately how often do you make a trip by each of these types of transport? *			
Frequency of use	**At least once per week**	**Less than that but at least once per month**	**Less than that**
Car driver			
Rental survey respondents	63.2%	17.4%	19.3%
No relevant comparator data available			
Car passenger			
Rental survey respondents	40.5%	31.9%	27.6%
No relevant comparator data available			
Ordinary bus (i.e. not express buses or coaches)			
Rental survey respondents	28.7%	19.0%	52.3%
NTS licence holders (GB)	17%	13%	71%
Train			
Rental survey respondents	16.7%	27.8%	55.6%
NTS licence holders (GB)	7%	13%	80%
Underground, metro or other tram			
Rental survey respondents	18.5%	17.7%	63.8%
No relevant comparator data available			
Taxi or minicab			
Rental survey respondents	10.6%	31.1%	58.3%
NTS licence holders (GB)	6%	19%	75%
Bicycle			
Rental survey respondents	18.9%	11.7%	69.4%
NTS licence holders (GB)	11%	9%	80%
Walking for 20mins (or more, without stopping)			
Rental survey respondents	76.3%	16.6%	7.2%
NTS licence holders (GB)	62%	13%	25%

NTS licence holder data is for 2010. More recent, directly comparable data was not readily available, although data for all travellers for England (2003-2014) and Great Britain (2003-2012) suggest that percentages change relatively little over time.

*This excludes those who responded 'don't know' (see Table 5.1 above).

5.3 Levels of car ownership

Respondents were asked about their household car ownership, as shown below. 31% reported that their household does not usually have a car (a figure which is reasonably consistent with the proportion reported earlier saying that one reason for using rental was a lack of household vehicle). 37% owned 1 car, and 32% owned two or more cars.

Compared with National Travel Survey data this indicates a higher share of non-car owning households compared to the general profile of Britain, and a smaller proportion of one-car households.

Table 5.3: How many cars / vans does your household usually have?

Answer Choice	Response Percent	Response Total	Household car ownership in Britain, 2012~
0^	31.2%	451	25%
1	36.8%	531	44%
2	24.5%	354	
3	5.9%	85	31%
4+	1.6%	23	
Total	100.0%	1,444	

* Question referred to all vehicles with a valid MOT certificate, including company cars.

~ Data taken from the National Travel Survey. Data for Great Britain is only available up to 2012. 2014 data for England is relatively similar

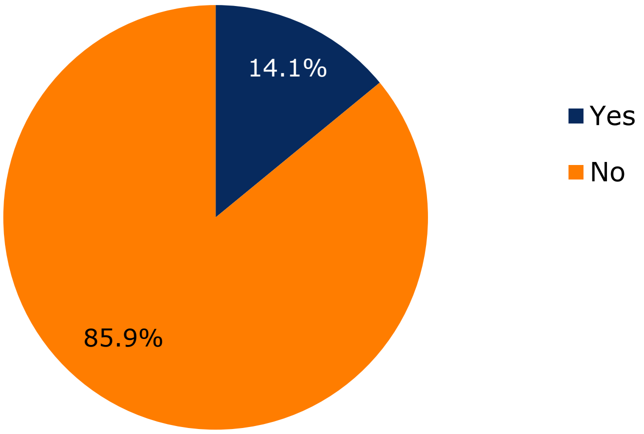
^ Three respondents clarified that they owned a motorbike

Three respondents (one of whom also owned a car) mentioned car club membership.

5.4 Impacts on past and future car ownership

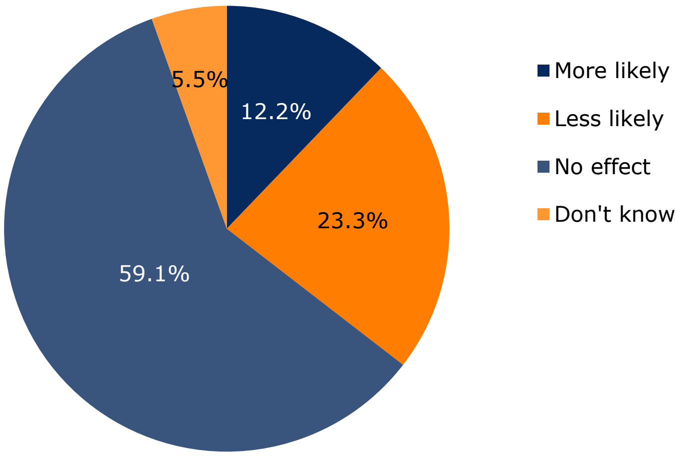
Fourteen percent of non-business users (203 respondents) indicated that in the last 12 months, their household had sold or got rid of a car that had not been replaced.

Chart 5.1: In the last 12 months, has your household sold or otherwise disposed of a vehicle (which has not been replaced?)



Respondents were asked whether the availability of rental had encouraged or discouraged them to buy a household vehicle in the next few years. 12% reported that they were more likely to buy a car as a result of rental. This was more than outweighed by the proportion – 23% – reporting that they were less likely to do so.

Chart 5.2: Do you think that the availability of vehicle rental has made it more or less likely that your household will buy a(nother) vehicle in the next few years (other than as a replacement for a vehicle that you already have)?



Of the 203 respondents who said that their household had sold or otherwise disposed of a vehicle (which has not been replaced) in the last 12 months, about 43% thought that availability of vehicle rental has had no effect on whether their household will buy a(nother) vehicle in the next few years. Just under 30% thought that the availability of car rental had made it less likely that their household will buy a(nother) vehicle in the next few years, and about 21% thought that the availability of rental made it more likely.

Hence, for both the sample as a whole, and for those who had got rid of a car in the last 12 months, on balance, the effect of rental was to reduce the likelihood of car ownership, with the net effect being in the order of 10% of the samples.

5.5 Levels of car use

Respondents were asked to provide the approximate mileage driven in their primary household vehicle in the last 12 months.

Table 5.4: For your primary household car (i.e. the one that your household drives most often), what was the approximate mileage driven in the last 12 months?

Answer Choice	Response Percent	Response Total
Zero	1.1%	11
1-500	1.1%	11
501-1,000	2.7%	27
1,001-2,000	2.9%	29
2,001-4,000	8.3%	83
4,001-6,000	13.0%	130
6,001-8,000	14.1%	141
8,001-10,000	19.2%	192
10,001-15,000	22.3%	223
15,001-20,000	7.5%	75
20,001-25,000	2.7%	27
25,001-30,000	1.8%	18
30,001-40,000	1.6%	16
40,000+	0.7%	7
Don't know	1.1%	11
Total responses*	100.0%	1,001

* 443 responses were excluded from this question as they did not own a household car.

An approximate comparison with NTS data about the annual mileage of four-wheeled cars in England in 2014 (Table NTS 0904), is next given. This indicates that the rental respondents appear to include a relatively high proportion of both low mileage and high mileage drivers.

Table 5.5: Comparing mileages done by rental respondents in their primary household car with mileages done by all cars in England.		
Mileage band~	**Rental respondent data**	**NTS data**
0-1000	5%	2%
1001-4000	11%	19%
4001-15,000	69%	70%
15,001+	15%	11%

~ It should be noted that NTS bands are defined slightly differently – i.e. 0-999; 1,000-3,999; 4,000-14,999 and 15,000+. The mileage data comes from respondent estimates.

5.6 Attitudes towards vehicle rental

Respondents were asked a series of five opinion statements.

The two relating to the advantages of rental received strong support:

- Hiring a vehicle (as needed) can have advantages over owning a vehicle (952 agree/168 disagree); and
- Having vehicle rental as an option enables me to use a variety of types of transport (1,096 agree/83 disagree).

Views on limiting or sharing personal car use received much less support, although there were still non-trivial numbers of people agreeing with each of the statements:

- I prefer not to travel by car when possible (270 agree/826 disagree);
- I try to limit my car use for the sake of the environment (341 agree/621 disagree); and
- I would consider sharing a car rather than owning one (325 agree/834 disagree).

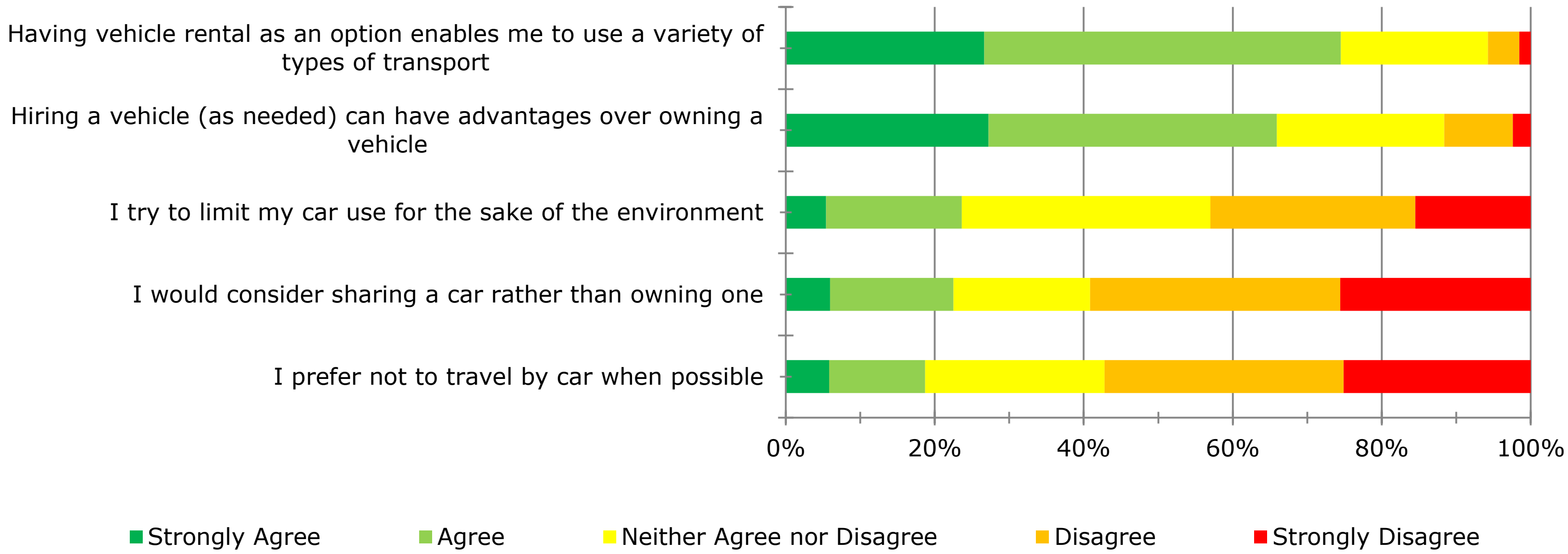
Table 5.6: This question considers attitudes towards vehicle rental

Please specify how strongly you agree or disagree with the following statements:

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree	Response Total	TOTAL AGREEMENT
Hiring a vehicle (as needed) can have advantages over owning a vehicle	393	559	324	133	35	1,444	65.9%
	27.2%	38.7%	22.4%	9.2%	2.4%	100.0%	
Having vehicle rental as an option enables me to use a variety of types of transport	385	691	285	61	22	1,444	74.6%
	26.7%	47.9%	19.7%	4.2%	1.5%	100.0%	
I prefer not to travel by car when possible	84	186	348	463	363	1,444	18.7%
	5.8%	12.9%	24.1%	32.1%	25.1%	100.0%	
I try to limit my car use for the sake of the environment	78	263	482	397	224	1,444	23.6%
	5.4%	18.2%	33.4%	27.5%	15.5%	100.0%	
I would consider sharing a car rather than owning one	86	239	265	485	369	1,444	22.6%
	6.0%	16.6%	18.4%	33.6%	25.6%	100.0%	

Chart 5.3: This question considers attitudes towards vehicle rental.

Please specify how strongly you agree or disagree with the following statements:



5.7 Frequency of using rental

Of the 1,444 respondents that did not use rental for business, 139 (just under 10%) reported that they were renting for the first time. In general, 78% of respondents had rented less than 6 times in the last 12 months, whilst the remaining 22% had rented 6 or more times. This implies a higher share that the omnibus data, where 94% of those renting had done so less than 6 times in the last 12 months, although this may partially be due to the inclusion of people renting, say, for a one-off summer holiday, in that data. Unsurprisingly, non car owners were more likely to be frequent renters, with 39% reporting that they had rented 3-5 times in the last 12 months and 30% reporting renting 6 or more times.

Table 5.7: Approximately how many times has your household rented a vehicle in the UK in the last 12 months?

	Non-car owners		Car owners		Total	
Answer Choice	**Response Percent**	**Response Total**	**Response Percent**	**Response Total**	**Response Percent**	**Response Total**
1~	16.7%	75	31.0%	308	26.6%	383
2	14.0%	63	20.2%	201	18.3%	264
3-5	38.9%	175	30.4%	302	33.1%	477
6-11	19.3%	87	12.4%	123	14.5%	210
12+	11.1%	50	5.9%	59	7.6%	109
Total	100.0%	450	100.0%	993	100.0%	1443

* One non-car owner referred to using Zipcar all the time and therefore was not included.

~Includes 139 respondents who indicated that they were first time renters, 10 respondents who initially said '0' rentals in the last 12 months and 234 renters who said '1'. It should be noted that the question wording was potentially ambiguous as to whether the rental that customers had just answered for was included.

5.8 Impacts on past travel behaviour

Just under 10% of respondents (139) who were replying to the survey for the first time were also renting for the first time. Consequently, these people were excluded when asking about the impacts of rental on previous travel behaviour, leaving a sample of 1,305 people. (Respondents were not required to answer all parts of the question. Hence, the sample sizes vary slightly for each section.)

Key findings are as follows:

- 9% of respondents felt that rental had affected the timing of vehicle purchasing, with 8% reporting that they had bought a vehicle later as a result of rental (compared to 1% making an earlier purchase, a net effect of 7%).
- 14% of respondents felt that rental had affected the number of vehicle owned, with 11% reporting that they had owned fewer vehicles as a result of rental (compared to 3% owning more, a net effect of 8%).

- 16% of respondents felt that rental had affected the type of vehicles owned, with 9% reporting that they had owned a smaller or more efficient car as a result of rental (compared to 6% owning a larger or less efficient vehicle, a net effect of 3%).
- 25% of respondents felt that rental had affected the amount of driving that they do, with 15% reporting that they had done more driving as a result of rental (compared to 10% reporting that they have done less, a net effect of 5%). As in the previous survey, it is unclear how respondents interpret this question, and whether the indirect effects of car rental on household car ownership are considered as well as the direct effects of driving the rental vehicle.

Non-car owners were considerably more likely than car owners to report that rental had resulted in owning fewer vehicles (16% compared with 9%), and that the availability of rental had changed the amount of driving they did, both increasing and decreasing it (with 43% reporting an effect compared to 17% of car owners). Meanwhile, current car owners were more likely to report that rental had led to the purchase of a different type of car, in terms of size or efficiency (19% reporting a response compared to 7% of non-car-owners).

Table 5.8a: In the past, has the opportunity to rent a car/van mean that you have done any of the following?

Timing of buying a household vehicle	Non-car owners		Car owners		Total	
	Response Percent	Response Total	Response Percent	Response Total	Response Percent	Response Total
Bought vehicle later	7.3%	30	8.6%	76	8.2%	106
Bought vehicle earlier	1.0%	4	1.4%	12	1.2%	16
No change	83.8%	346	86.0%	757	85.3%	1,103
Don't know	8.0%	33	4.0%	35	5.3%	68
Total	100.0%	413	100.0%	880	100.0%	1,293

Table 5.8b: In the past, has the opportunity to rent a car/van mean that you have done any of the following?						
Number of household vehicles owned	**Non-car owners**		**Car owners**		**Total**	
	Response Percent	**Response Total**	**Response Percent**	**Response Total**	**Response Percent**	**Response Total**
Owned fewer vehicles	15.5%	64	9.0%	79	11.1%	143
Owned more vehicles	1.5%	6	3.8%	33	3.0%	39
No change	76.9%	317	84.4%	743	82.0%	1,060
Don't know	6.1%	25	2.8%	25	3.9%	50
Total	100.0%	412	100.0%	880	100.0%	1,292

Table 5.8c: In the past, has the opportunity to rent a car/van mean that you have done any of the following?						
Type of household vehicle owned	**Non-car owners**		**Car owners**		**Total**	
	Response Percent	**Response Total**	**Response Percent**	**Response Total**	**Response Percent**	**Response Total**
Owned a smaller or more efficient car	4.4%	18	11.5%	100	9.2%	118
Owned a larger or less efficient car	2.2%	9	8.3%	72	6.3%	81
No change	86.7%	358	77.6%	675	80.5%	1,033
Don't know	6.8%	28	2.6%	23	4.0%	51
Total	100.0%	413	100.0%	870	100.0%	1,283

Table 5.8d: In the past, has the opportunity to rent a car/van mean that you have done any of the following?						
Total amount of driving done by household	**Non-car owners**		**Car owners**		**Total**	
	Response Percent	**Response Total**	**Response Percent**	**Response Total**	**Response Percent**	**Response Total**
More driving	25.7%	107	10.4%	91	15.3%	198
Less driving	17.5%	73	6.6%	58	10.1%	131
No change	51.7%	215	80.4%	707	71.2%	922
Don't know	5.0%	21	2.6%	23	3.4%	44
Total	100.0%	416	100.0%	879	100.0%	1,295

6 The urban context (non-business users)

Key findings

- As expected, car ownership is lowest for renters in London (42%), and other major cities and their suburbs (56%) and highest in rural areas (90%).
- As might also be expected, there is a higher proportion of frequent renters in London and the major cities, compared to smaller towns and cities or rural areas, although differences are relatively moderate.
- Meanwhile, perhaps surprisingly, the proportion of respondents reporting that they have sold or otherwise disposed of a car in the last 12 months which has not been replaced is relatively similar in all types of areas (12-15%), with the highest share in the smaller towns and cities.
- When asked about whether rental has made it more or less likely that they will buy a(another) vehicle in the next few years, a greater proportion of renters living in urban or suburban areas said that it was less likely (between 23-29%) compared to those living in rural areas (14%).

6.1 Introduction

This chapter looks in more detail at the sample of non-business users, (1444 respondents), with responses broken down by the type of area that the respondent lives in, either:

- London;
- Another major city and its suburbs;
- A smaller city or town and its suburbs; or
- A village or rural area.

The split of non-business users by urban-rural category is shown below:

Table 6.1: In which part of the UK do you live?/ In what type of area do you live?

	London	Other major city and its suburbs	Smaller city or town and its suburbs	Rural area	Total
No of respondents	261	296	638	249	1444
% of total	18.1%	20.5%	44.2%	17.2%	100%

Four questions have been analysed, to investigate whether there is a link between area types and the impacts of vehicle rental. These questions were:

- *"How many cars / vans does your household usually have?"*
- *"In the last 12 months, has your household sold or otherwise disposed of a vehicle (which has not been replaced?)."*
- *"Approximately how many times has your household rented a vehicle in the UK in the last 12 months?"*
- *"Do you think that the availability of vehicle rental has made it more or less likely that your household will buy a(nother) vehicle in the next few years (other than as a replacement for a vehicle that you already have)?"*

6.2 Household car ownership

When looking at the number of household vehicles owned in the different urban to rural areas, the following results are of note:

- 58% of respondents from London do not own a household car or van. For other major cities (and their suburbs), the proportion drops to 44%, then declining to 23% in smaller cities (and suburbs) and 10% in rural areas.
- In contrast, the share of 2+ car owning households increased from 13% in London to 54% in rural areas.

These patterns are in line with usual trends about lower levels of car ownership in urban areas.

Table 6.2: How many cars / vans does your household usually have? (% split by type of area)

No of cars/vans	London	Other major city and its suburbs	Smaller city or town and its suburbs	Rural area	All
0	58.2%	43.6%	22.6%	10.4%	451
1	28.7%	37.2%	40.6%	34.9%	531
2	9.6%	16.6%	29.0%	38.2%	354
3	2.3%	2.4%	6.7%	11.6%	85
4+	1.1%	0.3%	1.1%	4.8%	23
Total	100.0%	100.0%	100.0%	100.0%	-
Sample size	261	296	638	249	1,444

6.3 Frequency of rental

In terms of rental frequency, the proportion of respondents renting 6 or more times in the last year was higher in London and the other major cities (24% and 27% respectively) compared with the proportion from smaller towns and cities, or rural areas (20% in both cases), as shown in Table 6.3.

Table 6.3: Approximately how many times has your household rented a vehicle in the UK in the last 12 months?
(% split by type of area)

Answer choice	London	Other major city and its suburbs	Smaller city or town and its suburbs	Rural area	All
1~	22.7%	22.3%	31.2%	23.7%	383
2	16.5%	17.6%	17.2%	23.7%	264
3-5	36.5%	33.1%	31.8%	32.5%	477
6-11	15.8%	18.6%	12.4%	14.1%	210
12+	8.5%	8.4%	7.4%	6.0%	109
Total	100.0%	100.0%	100.0%	100.0%	-
Sample size	260	296	638	249	1,443*

* One respondent from London referred to using Zipcar all the time and therefore was not included.

~Includes 139 respondents who indicated that they were first time renters, 10 respondents who initially said '0' rentals in the last 12 months and 234 renters who said '1'. It should be noted that the question wording was potentially ambiguous as to whether the rental that customers had just answered for was included.

Alternative analysis showed that about 8% of respondents from London and from other major cities were first time renters. For smaller cities and towns, the proportion of first time renters was about 12% and in rural areas it was about 7%.

6.4 Vehicle disposal

Of the 1,444 non business users, 203 reported having sold or disposed of vehicle in the last 12 months.

When looking at the sample for the different area types, the proportion of respondents who reported selling or disposing of a vehicle was similar whether in an urban or rural area. The proportion was lowest in London (12%) and highest in smaller cities and towns (15%).

Table 6.4: In the last 12 months, has your household sold or otherwise disposed of a vehicle (which has not been replaced?)
(% split by type of area)

Answer choice	London	Other major city and its suburbs	Smaller city or town and its suburbs	Rural area	All
Yes	12.3%	14.2%	15.4%	12.4%	203
No	87.7%	85.8%	84.6%	87.6%	1,241
Total	100.0%	100.0%	100.0%	100.0%	-
Sample size	261	296	638	249	1,444

6.5 Effect of vehicle rental on future car ownership

In this question, respondents were asked whether they thought that the availability of vehicle rental made it more or less likely that they would buy a(nother) in the next few years, other than a replacement for an existing vehicle.

Of the total sample, 59.1% said that there was no effect.

When looking at the breakdown by area type:

- In all areas, a greater proportion of respondents thought that the availability of vehicle rental made it less likely that their household will buy a(nother) vehicle in the next few years, compared to the proportion who thought that rental made it more likely.
- A higher proportion of rural residents (70%) thought that there was no effect, compared to the proportions in other areas (58% London, 50% other major cities, 60% smaller cities and towns).
- The proportion of respondents from London and other major cities who thought they would be less likely to buy a(nother) vehicle were higher (26% and 29% respectively) than those who lived in smaller cities or towns areas (23%) or rural areas (14%). The net effect of the combined more/less likely responses was 13% in London; 14% in other major cities; 12% in smaller towns and cities, and 4% in rural areas.

Table 6.5: Do you think that the availability of vehicle rental has made it more or less likely that your household will buy a(nother) vehicle in the next few years (other than as a replacement for a vehicle that you already have)?
(% split by type of area)

Answer choice	London	Other major city and its suburbs	Smaller city or town and its suburbs	Rural area	All
More likely	13.4%	15.2%	11.3%	9.6%	176
Less likely	26.1%	29.1%	23.2%	13.7%	336
No effect	57.9%	49.7%	59.7%	69.9%	853
Don't know	2.7%	6.1%	5.8%	6.8%	79
Total	100.0%	100.0%	100.0%	100.0%	-
Sample size	261	296	638	249	1,444

7 Business users

Key findings

- Respondents came from workplaces located in all types of location, and all parts of the UK, and from organisations of all different sizes. 24% were self-employed; 31% worked for organisations employing 500+ people.
- 72% were responsible for their own transport choices for business; the remaining 28% were governed by organisational policy. 80% were travelling for business at least monthly, with 43% travelling at least weekly.
- There was strong support for the ideas that hiring a car could have advantages over owning a business fleet, and helped to facilitate multi-modal trips. Respondents also tended to agree that their organisation encouraged them to travel as efficiently as possible, and with others from their organisation when possible.
- 75% had been using rental for business purposes for more than a year, with about a quarter using it for business for more than 10 years
- The sample was fairly evenly split in terms of whether people used rental for less than a third, a third to two-thirds, or more than two-thirds of their business trips. However, it was notable that less frequent business travellers were likely to be using rental for a higher share of their trips; whilst frequent business travellers were more likely to use it for a lower share of their travel.

7.1 Introduction

In the sample of 1,799 rentals, 279 responses indicated that 'work travel for business meetings and/or other business purposes' had been either one of the main reasons, or the only main reason, for renting. (Use for commuting was indicated via a separate option.) Having filtered out people who had already answered the survey before, this provided a sample of 247 respondents (out of the 1,691 respondents) who had rented for business and were answering the survey for the first time. (It should also be noted that these were all people renting in a personal capacity, as those renting via a corporate account had been filtered out.)

7.2 Types of organisations represented

To understand the nature of organisations where rental is used for business travel, questions were asked about organisation size and location. In brief:

- Organisations of all sizes were represented – 24% of those travelling for business were self-employed, and 31% worked in organisations consisting of 500+ staff.
- Organisations from all parts of the UK were represented – with relatively high proportions from London, the South East and West, and Scotland.
- Workplaces were also located in a range of different types of location, both urban and rural.

Chart 7.1: How big is the organisation that you work for?

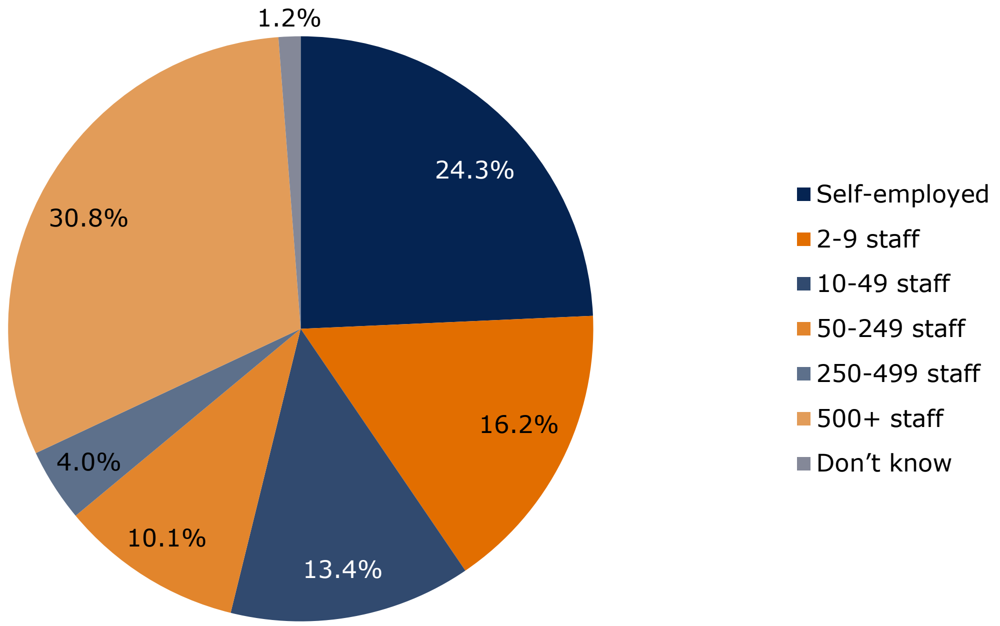


Table 7.1: In which part of the UK is your main workplace located?

Answer Choice	Response Percent	Response Total
London	19.4%	48
South East England (excluding London)	14.6%	36
South West England	13.4%	33
East Anglia	2.0%	5
West Midlands	5.3%	13
East Midlands	4.0%	10
Yorkshire & Humber	9.7%	24
North West	8.1%	20
North East	3.2%	8
Scotland	15.0%	37
Wales	2.0%	5
Northern Ireland	3.2%	8
Total	100.0%	247

Table 7.2: In what type of area is your main workplace located?		
Answer Choice	**Response Percent**	**Response Total**
London	19.4%	48
Other major city and its suburbs	33.2%	82
Smaller town or city and its suburbs	32.8%	81
Village or rural area	10.1%	25
Other (please specify)	4.5%	11
Total	100.0%	247

Answers from those respondents who said 'other' generally indicated that they worked nationally or they gave a non-specific location, e.g. airport or MOD.

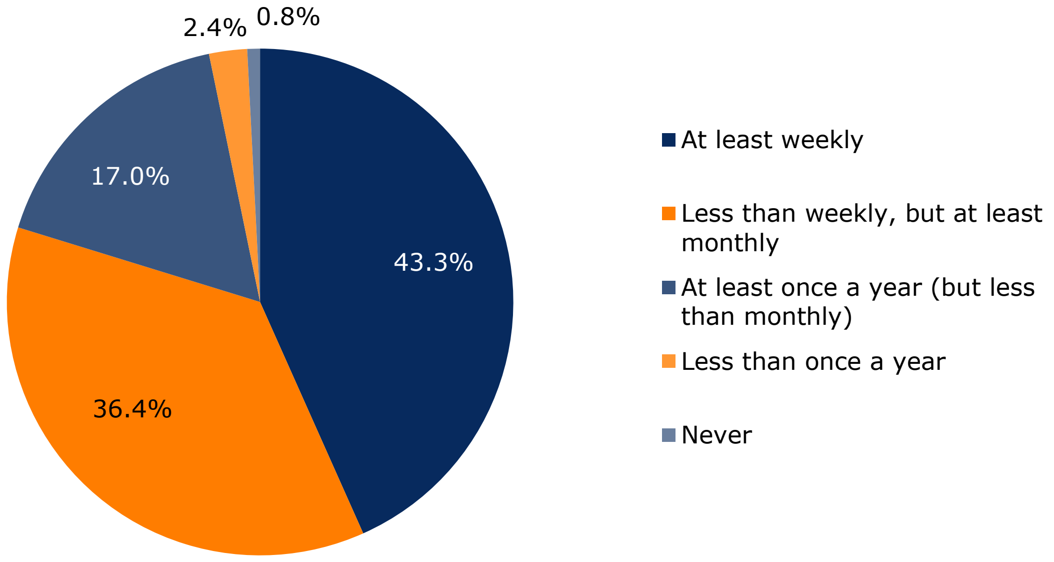
7.3 Nature of business travellers

Business renters were also asked about how far they were responsible for choosing rental, and how often they made business trips. Findings were:

- Most of those responding (72%) were responsible for their own travel choices. 20% said choices were governed by organisational policy, whilst a further 9% said this was the case, and that they determined the policy; and
- 80% were travelling for business at least monthly, with 43% travelling for business at least weekly.

Table 7.3: Please select which of the options below applies to you:		
Answer Choice	**Response Percent**	**Response Total**
The transport I use for business is my own responsibility.	71.7%	134
The transport I use for business is governed by organisational policy.	19.8%	37
The transport I use for business is governed by organisational policy which I determine.	8.6%	16
Total	100.0%	187

Chart 7.2: How often do you travel for business/work (excluding any commuting trips)?



7.4 Attitudes to rental

To understand the attitudes of business renters to rental, and business travel more generally, respondents were asked about their agreement or disagreement with a series of statements.

In all cases, between 11 and 15% of respondents felt that they could not answer for their organisation.

For those that did answer, there was strong agreement with the statements:

- Hiring a car (as needed) can have advantages over having a business fleet - 156 agreed; 9 disagreed;
- Having vehicle rental as an option means that employees can make more multi-modal trips (e.g. train and rental car, instead of drive-all-the-way) – 170 agreed; 9 disagreed;
- My organisation encourages employees to choose the most efficient transport options available – 156 agreed; 25 disagreed; and
- My organisation encourages employees to travel together where possible – 133 agreed; 24 disagreed.

Views were more mixed for the other two statements:

- My organisation prefers business travel not to be undertaken by car when possible (57 agreed; 79 disagreed); and
- My organisation is trying to limit car use for the sake of the environment (49 agreed; 79 disagreed).

In particular, a higher share neither agreed nor disagreed with the two latter statements.

Table 7.4: This question considers attitudes towards vehicle rental for business purposes.

Please specify how strongly you agree or disagree with the following statements:

Answer Choice		Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree	Cannot answer on behalf of the organisation	Response Total	TOTAL AGREEMENT
Hiring a car (as needed) can have advantages over having a business fleet		64	92	52	8	1	30	247	63.1%
		25.9%	37.2%	21.1%	3.2%	0.4%	12.1%	100.0%	
Having vehicle rental as an option means that employees can make more multi-modal trips (e.g. train and rental car, instead of drive-all-the-way)		61	109	40	6	3	28	247	68.8%
		24.7%	44.1%	16.2%	2.4%	1.2%	11.3%	100.0%	
My organisation prefers business travel not to be undertaken by car when possible		16	41	78	44	35	33	247	23.1%
		6.5%	16.6%	31.6%	17.8%	14.2%	13.4%	100.0%	
My organisation is trying to limit car use for the sake of the environment		15	34	81	51	28	38	247	19.9%
		6.1%	13.8%	32.8%	20.6%	11.3%	15.4%	100.0%	
My organisation encourages employees to choose the most efficient transport options available		64	92	37	16	9	27	245*	63.7%
		26.1%	37.6%	15.1%	6.5%	3.7%	11.0%	100.0%	
My organisation encourages employees to travel together where possible		45	88	62	16	8	28	247	53.8%
		18.2%	35.6%	25.1%	6.5%	3.2%	11.3%	100.0%	

*Two respondents failed to answer this question.

Chart 7.3: Attitudes towards vehicle rental for business purposes.

Please indicate how strongly you agree or disagree with the following statements:

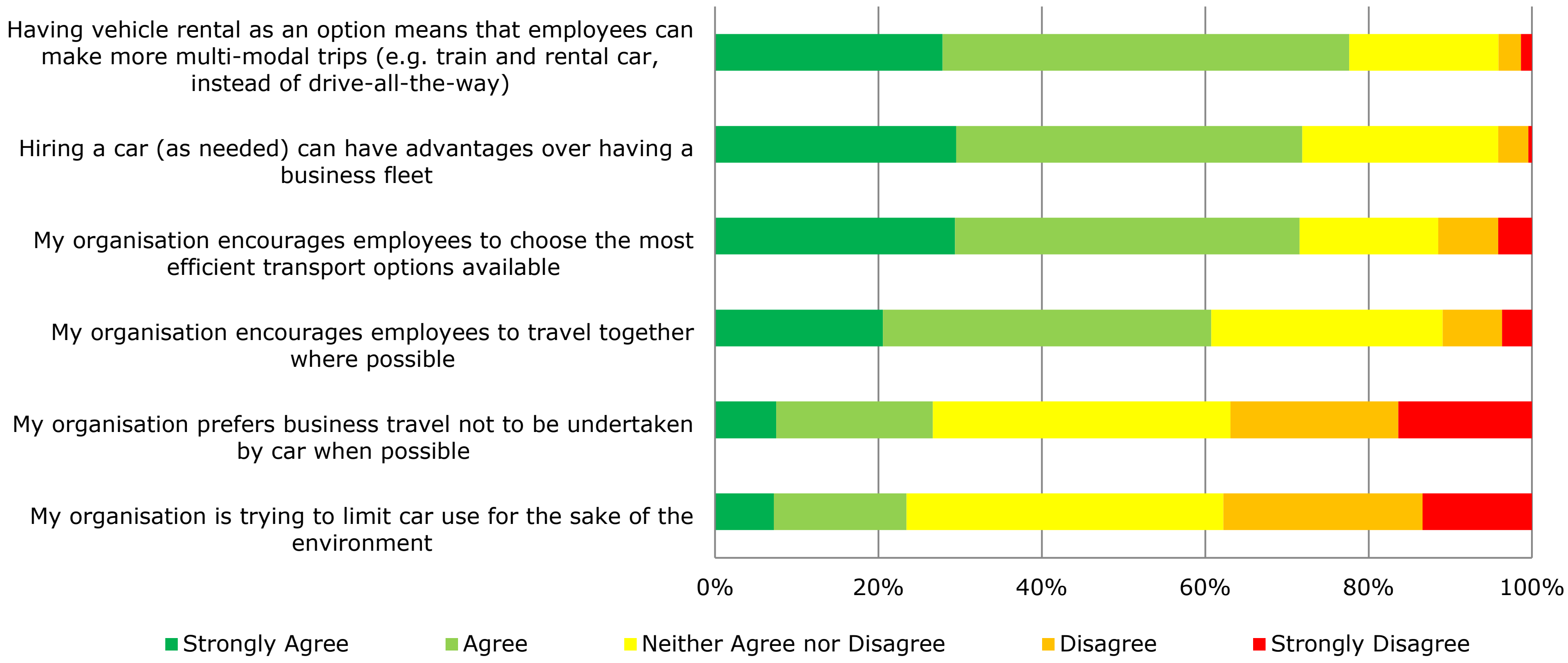


Chart excludes those who did not feel able to answer on behalf of their organisation.

7.5 Frequency of using rental for business trips

13% of the sample stated that it was the first time that they had used vehicle rental for business. Meanwhile, 87% of the sample said that they had used vehicle rental for business purposes before.

Overall, about a quarter were either a first time renter, or had been using rental for business for less than a year. A third had been using it for 1-5 years, with the remainder being longer term users, including another quarter who had been using it for more than 10 years.

Business renters were also asked about the number of business trips that they had made in the last 12 months, and the number of business trips by rental that they had made in the last 12 months. From this, it was also possible to calculate the share of business trips that people made by rental. The results are shown below. In brief:

- 83% of those responding to this question were making 7 or more business trips per year, including 46% making 25+ trips in the last 12 months.
- The sample was fairly evenly split in terms of whether people used rental for less than a third, a third to two-thirds, or more than two-thirds of their business trips.
- Further cross-correlation indicated that, as the frequency of business travel increases, rental typically accounts for a smaller share of business trips.

Table 7.5: For how many years have you been using vehicle rental in the UK for business purposes?

Answer Choice	Response Percent	Response Total
First time renter*	13.0%	32
Less than 1 year	11.7%	29
1-2 years	13.8%	34
3-5 years	21.5%	53
6-10 years	13.0%	32
11+ years	25.5%	63
Don't know	1.6%	4
Total	100.0%	215

* It should be noted that the question wording about the number of business trips made by rental in the last 12 months, which was used to distinguish between the top two rows of this table, was potentially ambiguous as to whether the rental that customers had just answered for was included.

Table 7.6: Approximately how many business trips (excluding any commuting trips) have you made in the last 12 months?		
Answer Choice	**Response Percent**	**Response Total**
1-6 trips	17.1%	36
7-24 trips	37.1%	78
25+ trips	45.7%	96
Total*	100%	210

* This excluded 5 respondents who gave incorrect answers and 32 first time renters, who were not asked these questions.

Table 7.7: For approximately how many business trips have you used vehicle rental in the last 12 months?		
Share of total business trips~	**Response Percent**	**Response Total**
0.1% - 33%	37.6%	79
34% - 66%	26.7%	56
67%-99%	11.0%	23
100%	24.8%	52
Total*	100.0%	210

~ Figures provided for this question were combined with the responses to the previous question to calculate the share of business trips made by rental

* This excluded 5 respondents who gave incorrect answers and 32 first time renters, who were not asked these questions.

7.6 Impact on past behaviour

Similar to the questions asked of the non-business renters, business renters were asked about the impacts of the availability of rental on decisions about business vehicles, and car driving.

First, it should be noted that levels of uncertainty about impacts were much higher than for personal customers – with more than a quarter of respondents saying ‘don’t know’ to all questions.

In relation to the questions about the timing, number and type of business vehicles owned, about 60% reported on ‘no change’ in all cases. However, for those that did report an impact, net positive effects were reported in all cases. In particular, this included:

- 5% reporting that they had bought a business vehicle later (compared to 3% reporting an earlier purchase);
- 11% reporting ownership of fewer business vehicles (compared to 3% reporting on owning more vehicles); and

- 9% reporting on ownership of smaller or more efficient vehicles (compared to 4% reporting the opposite effect).

In relation to the question on driving, 47% reported on no effect, 27% didn't know, 8% reported on less driving, whilst 18% reported on more driving. Interpreting this finding is problematic, as discussed in relation to the non-business renters.

Table 7.8: In the past, has the opportunity to rent a car/van mean that you have done any of the following?	**Response Percent**	**Response Total**
Timing of buying a business vehicle		
Bought business vehicle later	5.1%	11
Bought business vehicle earlier	3.2%	7
No change	62.5%	135
Don't know	29.2%	63
TOTAL	100.0%	216
Number of business vehicles owned		
Owned fewer business vehicles	11.3%	24
Owned more business vehicles	3.3%	7
No change	59.0%	125
Don't know	26.4%	56
TOTAL	100.0%	212
Type of business vehicle owned		
Owned smaller or more efficient business vehicles	8.6%	18
Owned larger or less efficient business vehicles	3.8%	8
No change	60.5%	127
Don't know	27.1%	57
TOTAL	100.0%	210
Total amount of driving done by organisation		
More driving	18.3%	39
Less driving	7.5%	16
No change	46.9%	100
Don't know	27.2%	58
Total	100.0%	213

8 Personal characteristics

Key findings

- 76% respondents were male
- Responses were received from all age groups, of 21+ years old. 75% of respondents were aged between 30 and 64, with a somewhat higher proportion from the 45-60 year age bands.
- Respondents live in all types of areas, with the highest share of respondents living in urban areas outside the main conurbations.
- Respondents came from all regions of the UK, with a somewhat proportionally higher share from London, the South East, South West and Scotland.
- Respondents represented all of the social groups represented by the Mosaic classification system, with the following notable groupings:

  Car rental has a *higher than average* representation amongst:

  - Rental Hubs – Educated young people privately renting in urban neighbourhoods
  - City Prosperity – High status city dwellers living in central locations and pursuing careers with high rewards
  - Domestic Success – Thriving families who are busy bringing up children and following careers

  Car rental has a *lower than average* representation amongst:

  - Modest Traditions – Mature homeowners of value homes enjoying stable lifestyles
  - Vintage Value – Elderly people reliant on support to meet financial or practical needs
  - Family Basics – Families with limited resources who have to budget to make ends meet
  - Suburban Stability – Mature suburban owners living settled lives in mid-range housing

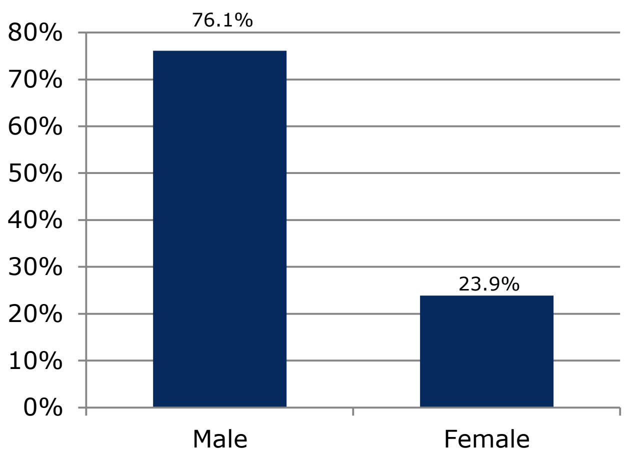
8.1 Introduction

This chapter provides information on the socio-demographic characteristics of those responding to the survey – specifically, the 1,691 respondents who completed this survey for the first time. Those who had completed the survey before were not asked to complete this section. As these questions were optional, some respondents chose not to answer, therefore the actual sample varies for each question.

8.2 Gender

76% of those responding to the survey were male. It should be noted that, whilst the precise proportion varies, this tendency for a higher share for renters to be male is reported in other surveys both of renters, and of car club members. For example, in the operator data gathered for the 2014 Carplus annual surveys of car club members, 69% of members were reported to be male[13].

Chart 8.1: Are you?*

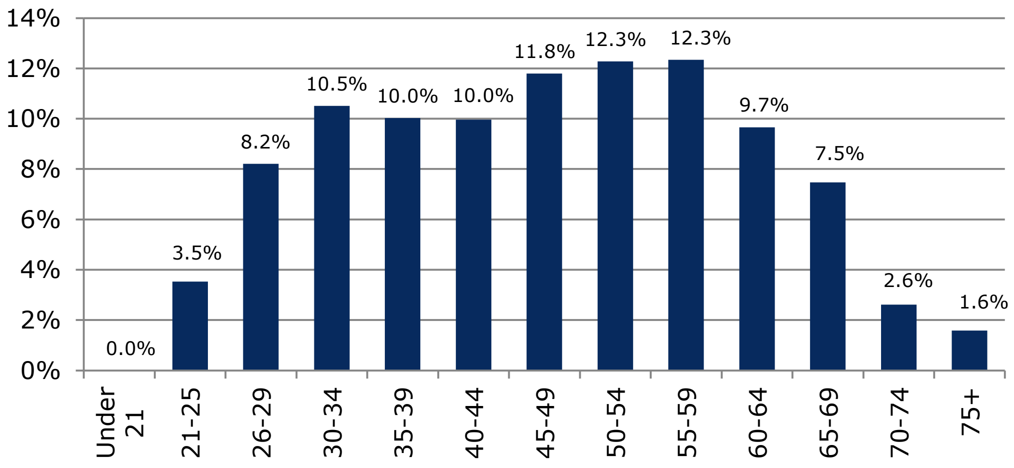


*These results exclude 11 people who chose not to respond and 12 people who responded '*prefer not to say*'.

8.3 Age

Survey responses were received from all age groups over 21. Approximately 75% of those responding to the survey were aged between 30 and 64, with slightly higher levels of response from those aged 45-60.

Chart 8.2: On your last birthday, how old were you?*



*These results exclude 22 people who chose not to respond and 24 people who responded 'prefer not to say'.

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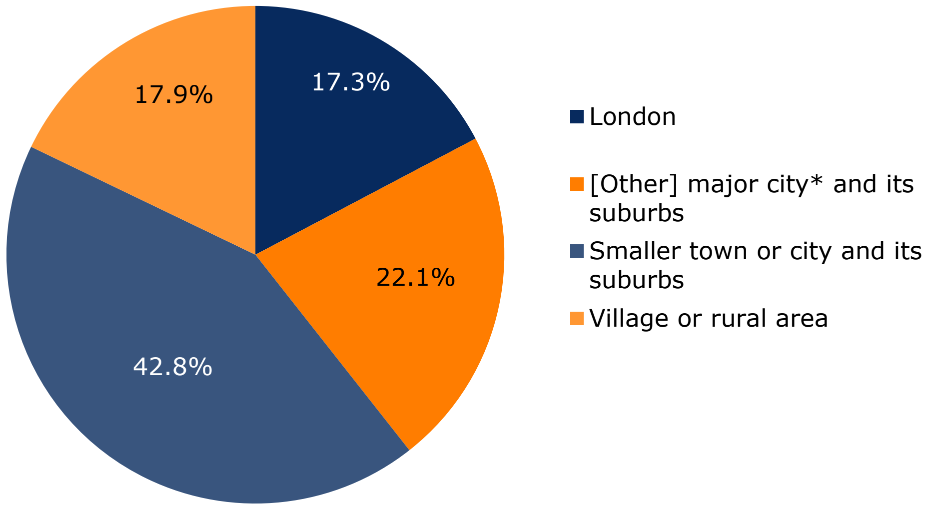
13 http://www.carplus.org.uk/tools-and-resources/annual-survey-of-car-clubs/

8.4 Home location

8.4.1 Type of location

Respondents live in all types of areas, including 18% in rural locations (which is notable since only 1% of the rentals described involved collection from a rural location). The largest share of respondents came from smaller towns and cities, and their suburbs.

Chart 8.3: In what type of area do you live?



8.4.2 Geographical distribution of home location

Responses were received from all parts of the UK. Compared to the equivalent share of the UK population, there was a somewhat higher representation from London, the South East and South West and Scotland.

Table 8.1: In which part of the UK do you live?			
Answer Choice	**Response Percent**	**Response Total**	**% UK population as of 2014**[14]
London	17.3%	292	13%
South East England (excluding London)	18.3%	310	14%
South West England	10.9%	184	8%
East Anglia	4.9%	83	9%
West Midlands	4.8%	82	9%
East Midlands	6.3%	107	7%
Yorkshire & Humber	5.4%	91	8%
North West England	8.3%	140	11%
North East England	3.5%	60	4%
Scotland	14.3%	241	8%
Wales	3.6%	61	5%
Northern Ireland	2.4%	40	3%
Total	100.0%	1691	100%

8.5 User profiles (based on Mosaic data)

Of the 1691 respondents, 1,476 provided valid postcode data. This was linked to the dominant Mosaic code for that postcode (provided via Experian) in order to identify the types of people that rent compared to the UK population. The Mosaic classification system divides the UK population into 15 main types.

The main findings that emerge are:

- Respondents came from all of the different Mosaic categories, suggesting that rental is used by all types of people
- The highest proportion of respondents came from the 'Rental hubs' category (Educated young people privately renting in urban neighbourhoods).
- Three other groups had a higher representation than in the UK population – in particular 'City prosperity' (i.e. High status city dwellers living in central locations and pursuing careers with high rewards)
- The remaining 11 groups had lower representation than in the UK population – in particular, 'Suburban Stability' (Mature suburban owners living settled lives in mid-range housing) and 'Family Basics' (families with limited resources who have to budget to make ends meet).

[14] https://www.nomisweb.co.uk

Table 8.2: Respondents broken down by Mosaic UK groups				
	Response Percent	**Response Total**	**% of UK population**[15]	**% of UK households**[14]
City Prosperity: ***High status city dwellers living in central locations and pursuing careers with high rewards***				
	9.6%	142	3.97%	3.58%
Prestige Positions: ***Established families in large detached homes living upmarket lifestyles***				
	9.1%	135	9.01%	7.42%
Country Living: ***Well-off owners in rural locations enjoying the benefits of country life***				
	6.8%	101	6.49%	6.07%
Rural Reality: ***Householders living in inexpensive homes in village communities***				
	5.2%	77	5.55%	5.87%
Senior Security: ***Elderly people with assets who are enjoying a comfortable retirement***				
	6.4%	94	6.58%	8.46%
Suburban Stability: ***Mature suburban owners living settled lives in mid-range housing***				
	4.5%	66	10.32%	8.40%
Domestic Success: ***Thriving families who are busy bringing up children and following careers***				
	9.6%	142	7.05%	6.86%
Aspiring Homemakers: ***Younger households settling down in housing priced within their means***				
	7.3%	108	8.17%	8.79%
Family Basics: ***Families with limited resources who have to budget to make ends meet***				
	4.5%	66	8.74%	7.22%
Transient Renters: ***Single people privately renting low cost homes for the short term***				
	4.9%	73	5.95%	6.45%
Municipal Challenge: ***Urban renters of social housing facing an array of challenges***				
	4.8%	71	5.69%	6.46%
Vintage Value: ***Elderly people reliant on support to meet financial or practical needs***				
	3.5%	52	4.73%	6.82%
Modest Traditions: ***Mature homeowners of value homes enjoying stable lifestyles***				
	4.0%	59	5.95%	5.85%
Urban Cohesion: ***Residents of settled urban communities with a strong sense of identity***				
	5.3%	78	5.37%	4.79%
Rental hubs: ***Educated young people privately renting in urban neighbourhoods***				
	14.4%	212	6.43%	6.96%
TOTAL	100.0%	1476	100.0%	

[15] Taken from Mosaic UK, Experian Marketing Services (2015).

Appendix A Survey details

A.1 Introduction

This appendix describes the survey process.

A.2 Survey process

An initial meeting was held with TRL and the BVRLA to agree the scope of the work and the draft questionnaire, based on similar work carried out in 2012. The questionnaire was then implemented via the 'Smart-survey' website. Smart Survey provides a service which enables the creation and implementation of on-line questionnaires. The questionnaire was then subject to several rounds of cognitive testing and refinement. One final version was created for use by all of the companies involved, and was jointly branded with the logos of the BVRLA and TRL. All companies were involved in approving the generic questionnaire. BVRLA provided an incentive for survey completion (consisting of a prize draw for £100 vouchers for three respondents).

A variety of techniques were used for asking people to participate including:

- Sending to members of the company's loyalty scheme;
- Sending as part of a generic marketing email;
- Sending to all renters in the past year;
- Sending to a sample of recent renters; and
- Sending to those renting during the survey period.

Requests were sent to customers from mid-September. Following an initial analysis of results at the end of October (at 335 responses), a few minor changes to questions were made. Responses were collected until 18th December 2015, when the survey was closed.

A.3 Defining responses that were in scope

The nature of the core questionnaire is described in Section A.4. Meanwhile, as highlighted, a key issue involved ensuring that responses received were 'in scope'.

Initially, the intention was that those who were not in scope (i.e. those living or renting overseas, those hiring via a corporate account) would not be asked to complete the survey. However, for various reasons, the rental companies were unable to screen out all of those who were out of scope. Hence, the issue was addressed in a number of ways, which included:

- Text on the front page stating:

  "It would be very helpful if you could take a few minutes to answer the following questions about your last vehicle rental in the UK."

  "Please **do not complete** this survey if you live abroad, your last rental took place overseas, or your last rental was booked through your company/employer - i.e. via a corporate account"

- A filter question asking "Do you live in the UK?" (with those replying 'no' taken to a final page).

- A filter question asking:

  "Was your rental booked through your employer/company (i.e. via a corporate account)?"

  (Please put 'no', if you booked a vehicle for work, but the booking was not through a corporate account.)

  (with those answering 'yes' or 'don't know' taken to a final page).

- A filter question asking "Was your last rental for use within the UK (i.e. England, Scotland, Wales, Northern Ireland)?"

  (with those answering 'no' or 'don't know' taken to a final page).

- Text at the beginning of the core questions stating "Please answer the following questions for your last rental in the UK."

- Details of rental location (asked through a series of questions).

The answers given were used to remove respondents who were not in scope. In addition, a few of the comments received in relation to individual questions indicated that respondents should be removed (not least as this meant that they would also have answered previous questions incorrectly).

In total, the out-of-scope responses that were received and removed at the various stages were as follows:

Table A1: Reason	Number removed
Don't live in the UK	137
Didn't rent in the UK	139
Booked through a corporate account	165
Inappropriate answers to individual questions	2
Total	443

In addition to this, at the time of analysis it was decided that those who rented a van or minibus would also be excluded from the sample. This meant that a further 196 responses were removed.

This left a total of 1,799 valid responses, from the initial sample of 2,438 responses that were received.

A.4 Nature of the questionnaire

The structure of the core questionnaire is outlined in Figure A-1. (This excludes the filter questions on living overseas, and renting through a corporate account, which are given above).

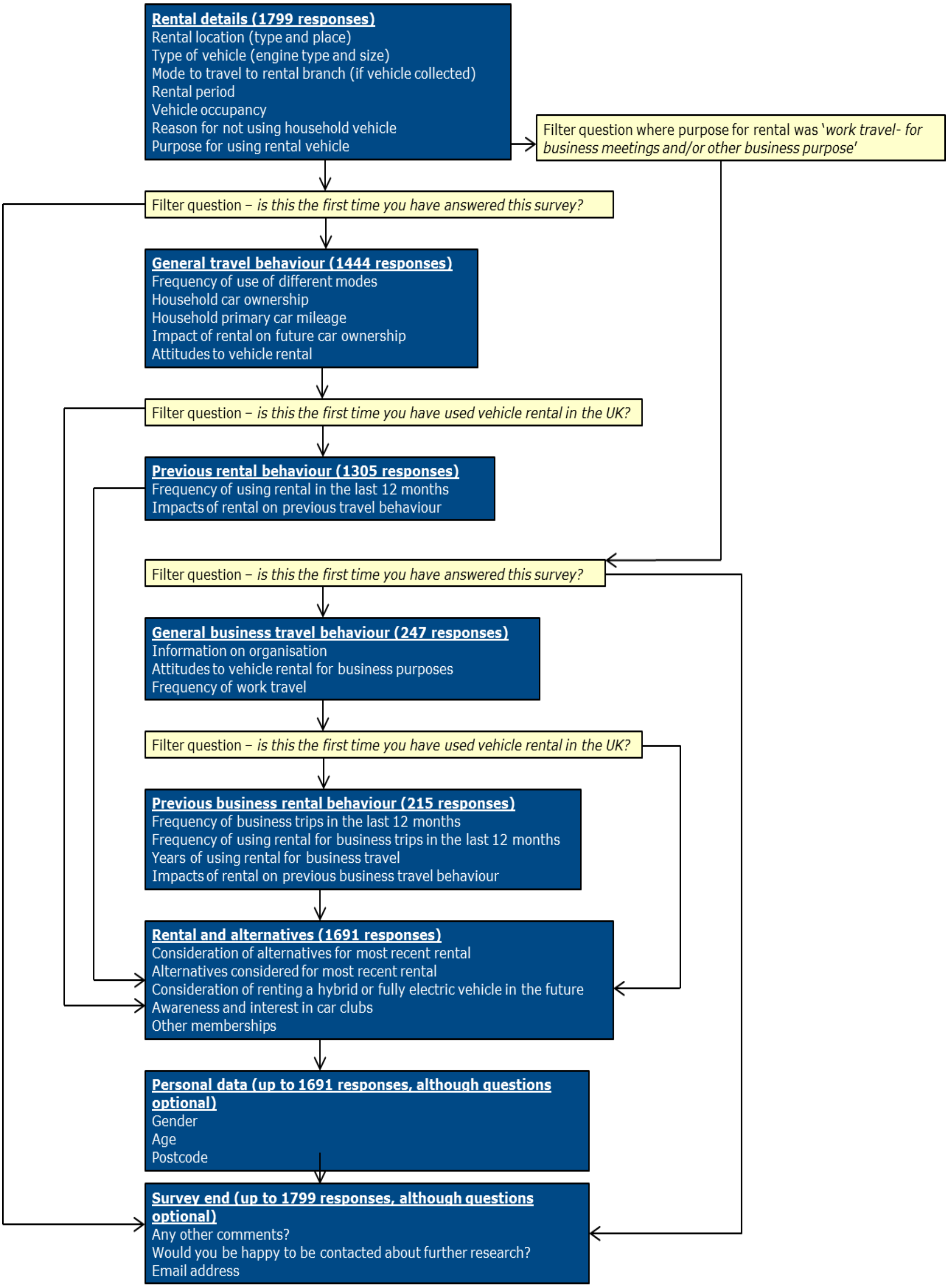


Figure A-1: Nature of the questionnaire used

As shown there, the survey principally consisted of four sections:

- Details of your last rental (in the UK) for all users;
- Details of general travel behaviour (for those answering the survey for the first time relating to personal use);
- Details of previous rentals and past impacts on travel behaviour (for those answering the survey for the first time, relating to personal use, who were not first time renters);
- Details of general travel behaviour of business users (for those who did not rent through a corporate account, and who answered that their last rental was partially or completely for business purposes excluding commuting);
- Details of previous rentals and past impacts on business travel behaviour (for those business users answering the survey for the first time, who were not first time renters);
- Details of alternatives considered by all users answering the survey for the first time; and
- Personal characteristics (for those answering the survey for the first time).

In the main report, we have reproduced the precise question wording used, in all cases where it is relevant (either as part of the data tables, within the text, or in footnotes, as appropriate), to ensure clarity of results.

A.5 The questionnaire used

The full questionnaire is only included in the electronic version of the report. This is available from the BVRLA and TRL websites:

http://www.bvrla.co.uk

http://www.trl.co.uk/reports-publications/report/?reportid=7041

Car rental customer survey 2015

Building on research in 2012, this report describes the results from a survey of 1,691 personal car rental customers undertaken in 2015. As previously, it is clear that rental appeals to a wide variety of people, and is used for a diverse range of reasons. As well as convenience and flexibility, reasons cited for using rental include transport of bulky luggage, complex trip patterns, faster journey times and the ability to transport people who are elderly or have a disability.

Use of rental vehicles is relatively efficient compared with use of private cars: on average rental cars are newer and cleaner than the private car fleet; over 70% of rentals involve two or more people sharing the vehicle; and 75% of rentals are of a small or medium sized car. Private rental customers are also favourably disposed towards hybrid and electric vehicles – 65% would consider using them for a future rental of less than 50 miles if they cost the same as a conventional vehicle. For about a quarter of rentals, respondents said they used the rental car to help them link with trains, planes or ferries as part of a longer journey, and 12% of rental customers owned a public transport season ticket. As a result of rental opportunities, some customers reported that they had previously bought a vehicle later, owned fewer vehicles or owned a smaller or more efficient vehicle; and that they were less likely to buy a vehicle in the future (with the numbers being greater than those reporting opposite effects).

Other titles from this subject area

PPR660	Rental customer survey 2012. Cairns S and Harmer C (2013)
PPR591	The emission impacts of car clubs in London. Cairns S and Harmer C (2012)
PPR585	Vehicle rental: environmental and sustainability implications. Cairns S (2012)
RAC Foundation, London	Accessing cars – insights from international experience. Cairns S and Harmer C (2011)

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