



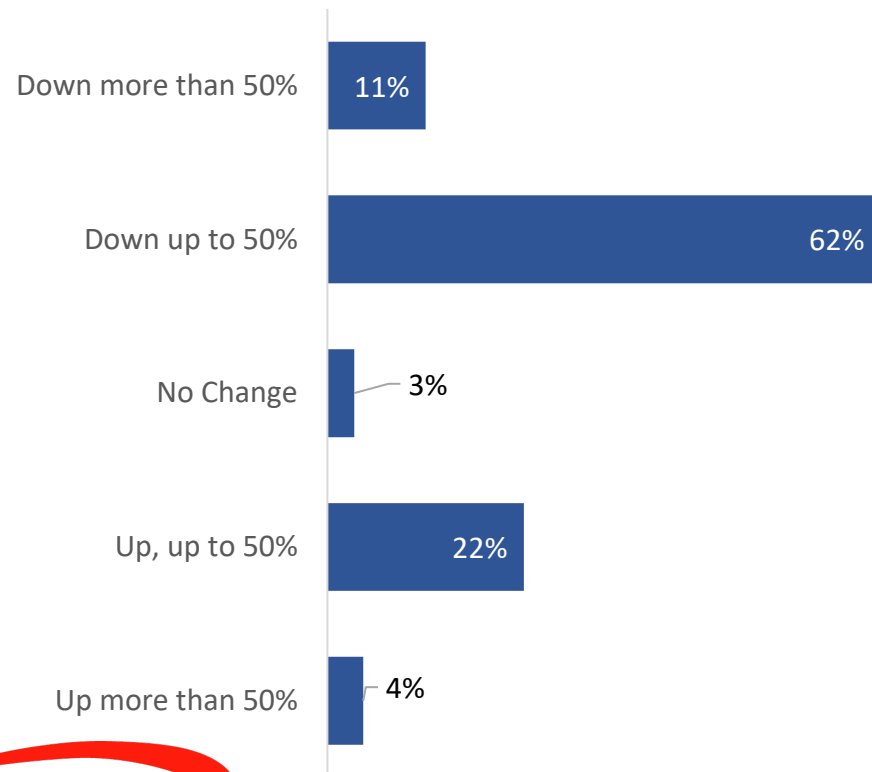
2021 Business Impact Survey Results

Wave 1

25th February 2021

Financial Impact

Sales Transactions 2019 v 2020



- **73%** of companies report the number of sales transactions down year on year
- **77%** of rental companies report the number of sales transactions down year on year.
- **26%** of rental companies report the number of sales transactions down more than 50% year on year compared with the industry average of 11%.

Falling Staffing Levels

The Industry

(77 Companies responding)

Comparing February 2020 with February 2021

44% have lower staffing levels
38% have the same staffing levels
18% have greater staffing levels

Rental Operators

(27 Companies responding)

Comparing February 2020 with February 2021

70% have lower staffing levels
22% have the same staffing levels
7% have greater staffing levels

14% of the industry suggest that their staffing levels have fallen by more than 25%.

37% of rental operators suggest that their staffing levels have fallen by more than 25%.

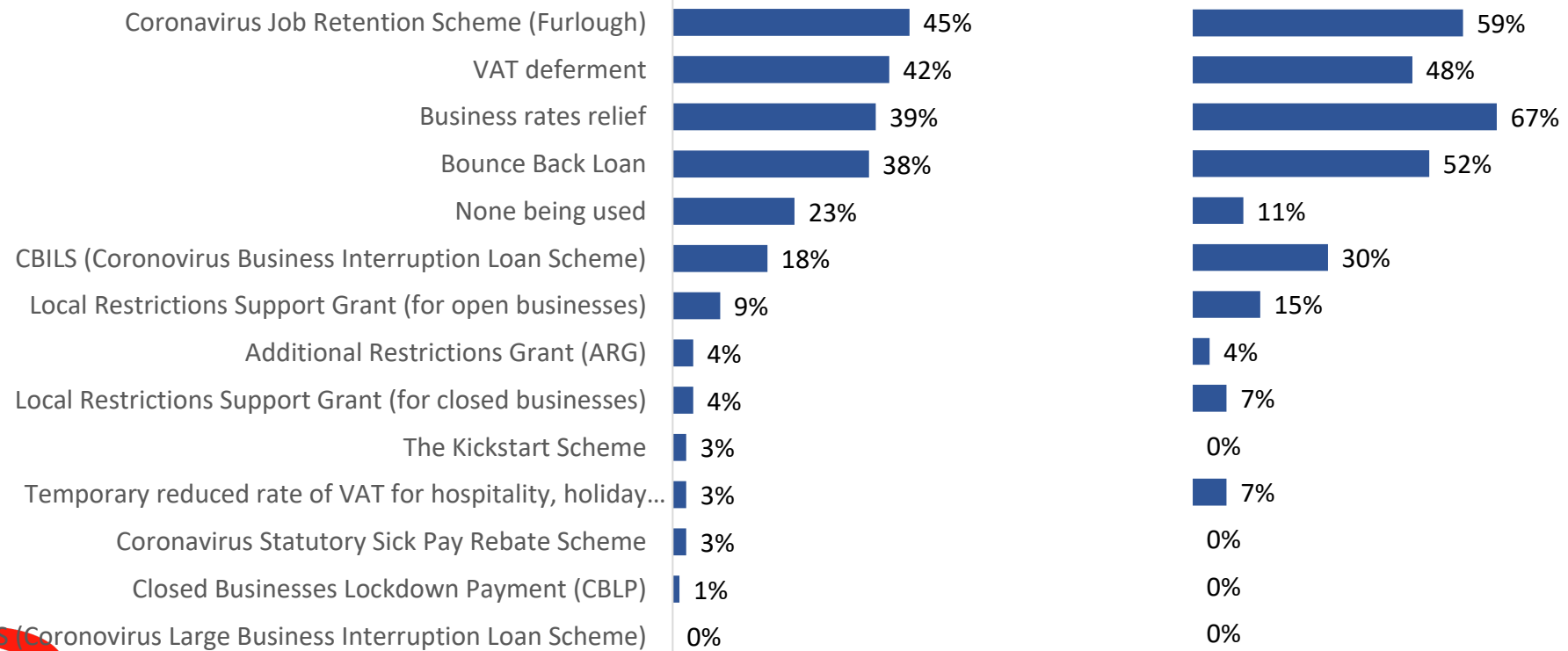
Of the **11** respondents suggesting staffing levels had fallen by more than 25%, **10** were rental operators.

Government Support

Government Support Measures Being Used

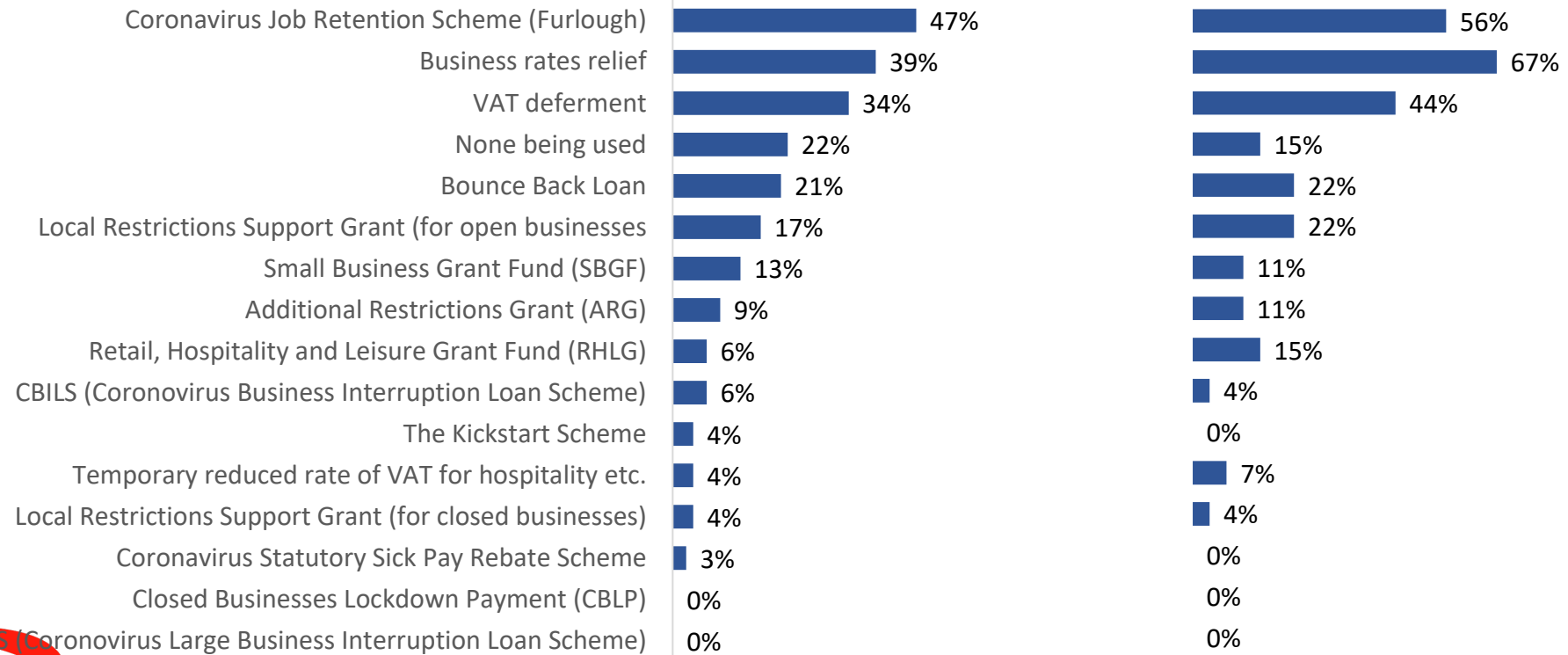
Whole Industry

Rental Sector



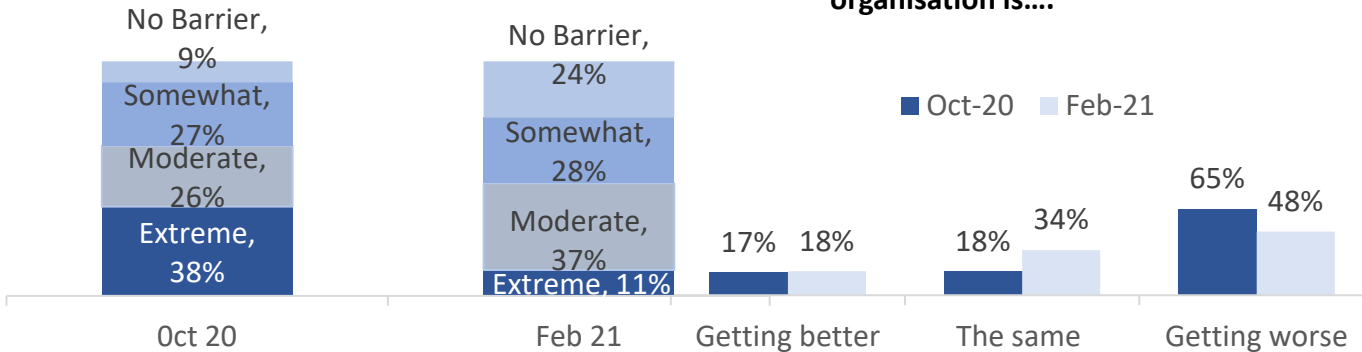
Government Support

Government Support Measures Of Most Use If Extended (select up to 3)



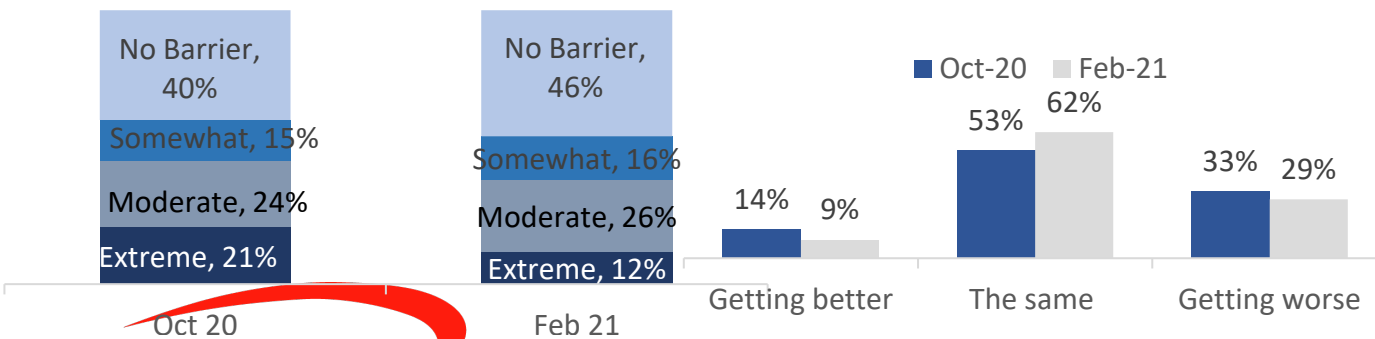
Barriers Preventing Businesses Returning To Normal

Barrier – Supply of vehicles



- Vehicle supply is seen as a barrier for businesses recovering from the impacts of covid-19 by 76% of respondents. This is lower and less extreme than when measured in October.
- Around half suggest that the supply of vehicles is getting worse.

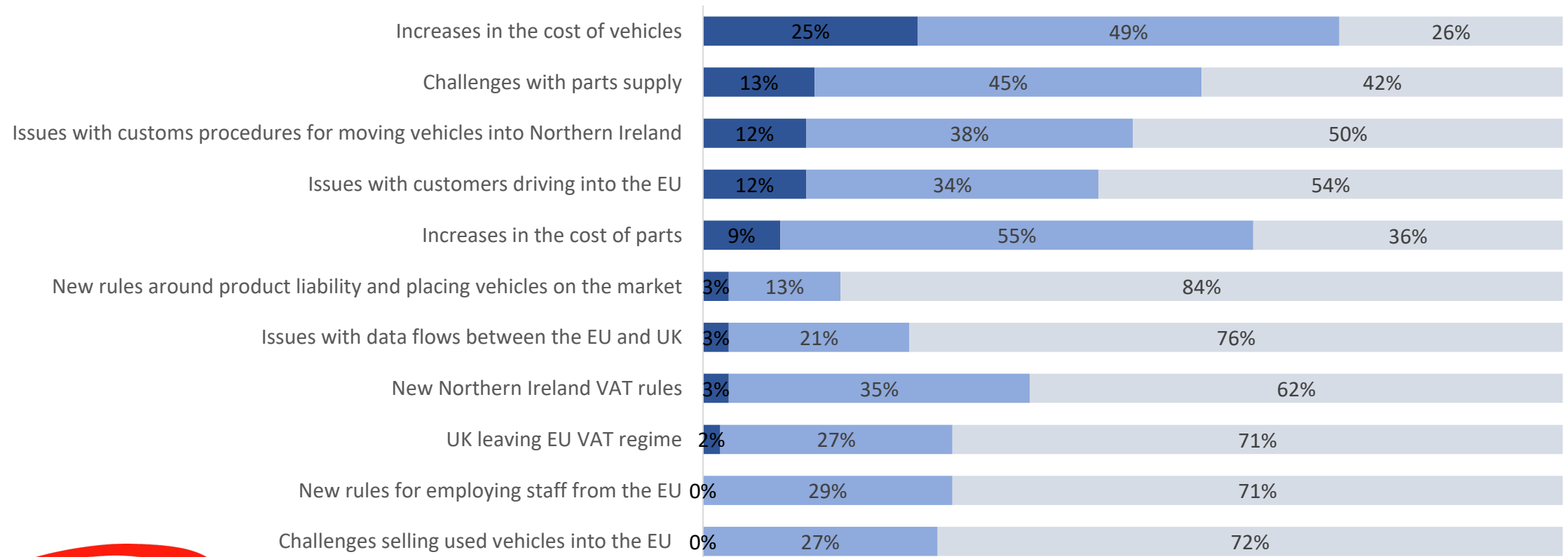
Barrier – Access to finance



- Access to finance is seen as a barrier by 54% of respondents with 1 in eight suggesting it is an extreme barrier for them.
- Three in ten think getting access to finance is getting worse.

EU Exit

Impact of EU Exit on Aspects of Members Businesses

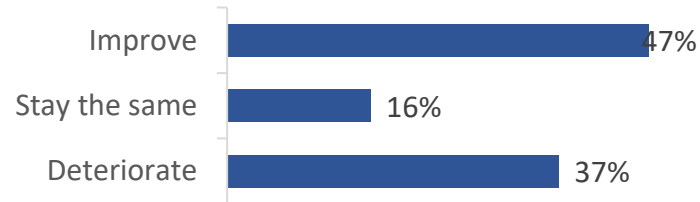


Base: Challenge where applicable

■ Major Impact ■ Minor Impact ■ No Impact

The next six months.....

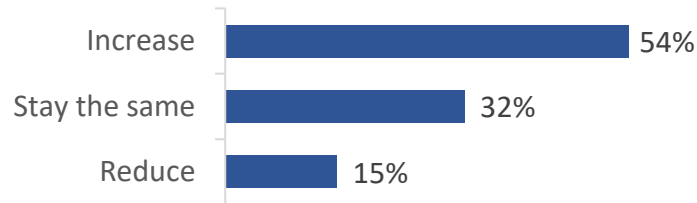
The Economy



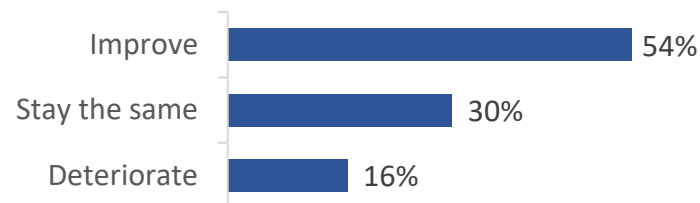
Business for UK Lease Sector



Size of your fleet..



Business for UK Short Term Rental Sector



Rental sector, against total sample:

- Less likely to see deterioration in the economy but also less likely to see improvement.
- Less confident about an upturn in business.
- Slightly more likely to see increase in fleet size.