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### This report looks at the following areas:

- Converting non-users remains a major opportunity
- Young men are an important market for the industry
- Alternatives are disrupting and blurring the market for personal transport



"Short-term vehicle rental is a mature market and is facing increased pressure from new forms of access to personal transport. While hire companies are responding by adapting to these changed market conditions, our research suggests that focusing on key user groups is needed so as to maximise available opportunities." – Neil Mason, Category Director – Retail

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#### **ISSUES AND INSIGHTS**

- Converting non-users remains a major opportunity
- The facts
- The implications
- Young men are an important market for the industry
- The facts
- The implications
- Alternatives are disrupting and blurring the market for personal transport
- The facts
- The implications

#### THE MARKET – WHAT YOU NEED TO KNOW

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Intermediaries remain a key channel

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- New entrant Virtuo enters market with mobile approach to rental
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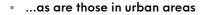
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- Regular hirers are most attracted to alternatives
- Those hiring for university travel show strong interest in alternatives to vehicle hire

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