



ERA & LECTURA

Rental Survey

BOOSTING EQUIPMENTS INSIGHTS

WWW.LECTURA.DE

Survey participants

11,429 people from 187 countries worldwide

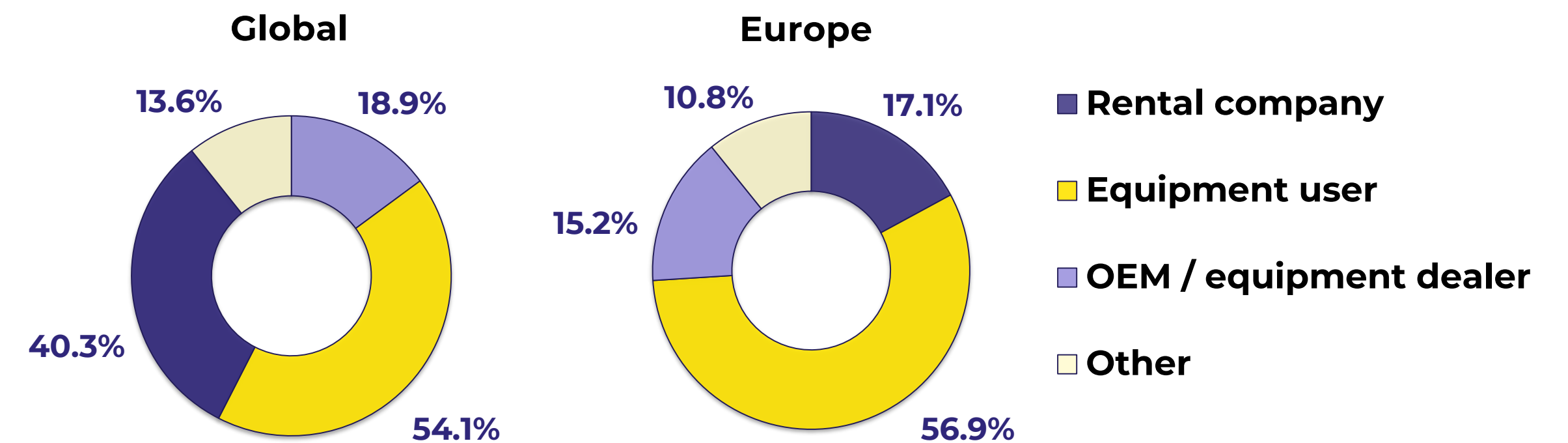
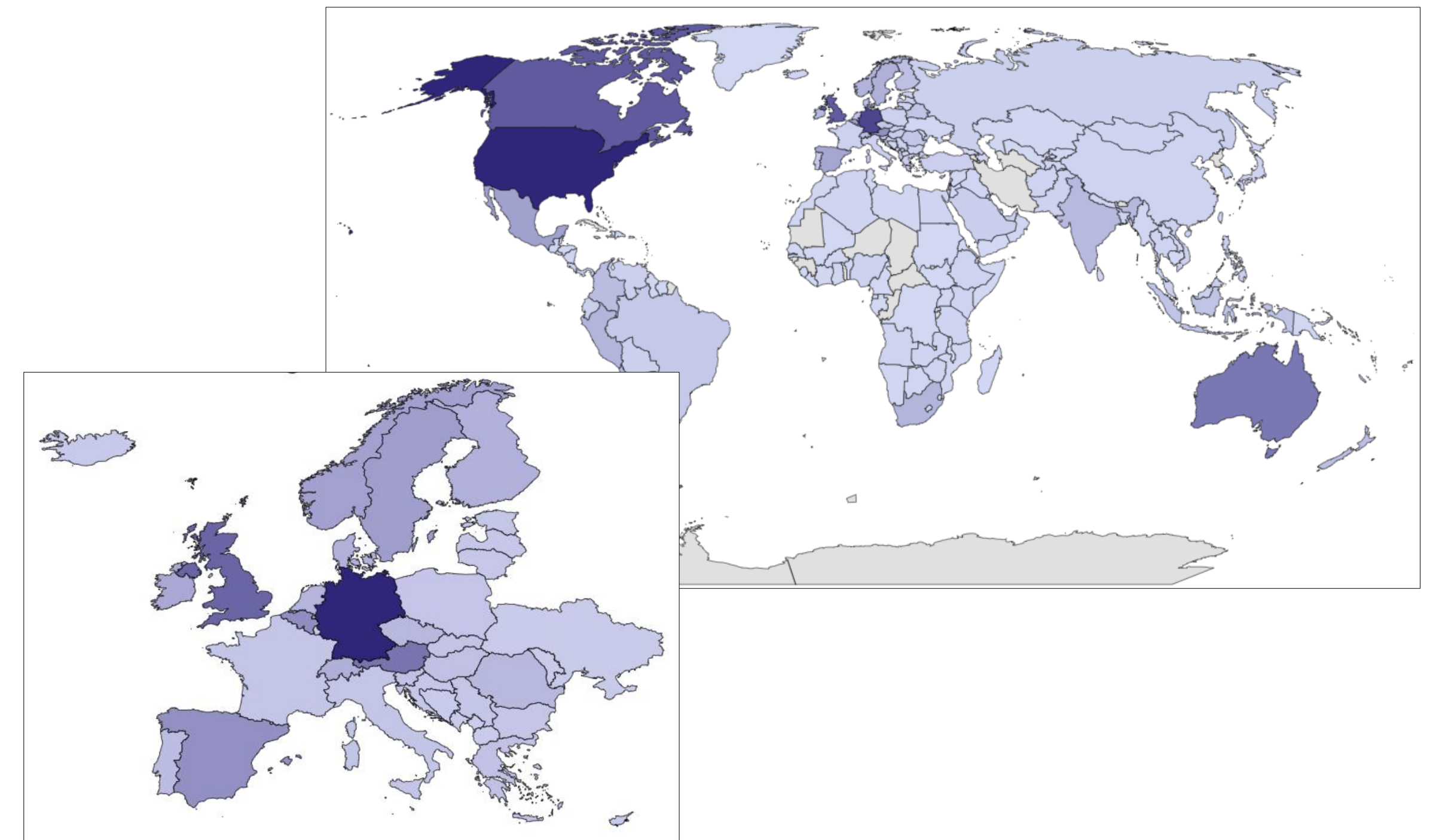
- Rental company representatives: 18,9 %
- Equipment users: 54,1%
- OEMs / Equipment dealers: 13,4%
- Other: 13,6%

44,4% of all respondents came from Europe

- Rental company representatives: 17,1%
- Equipment users: 56,9%
- OEMs / Equipment dealers: 15,2%
- Other: 10,8%

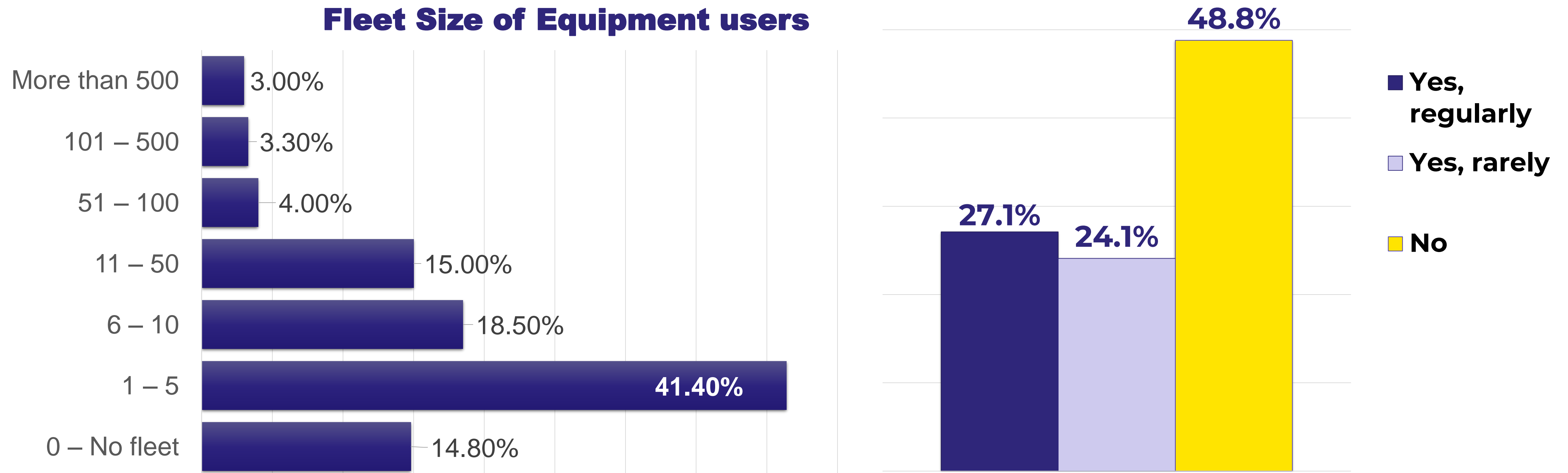
The primary focus of our research: Europe

- European rental companies (N = 865)
- Equipment users from Europe (N = 2,885)



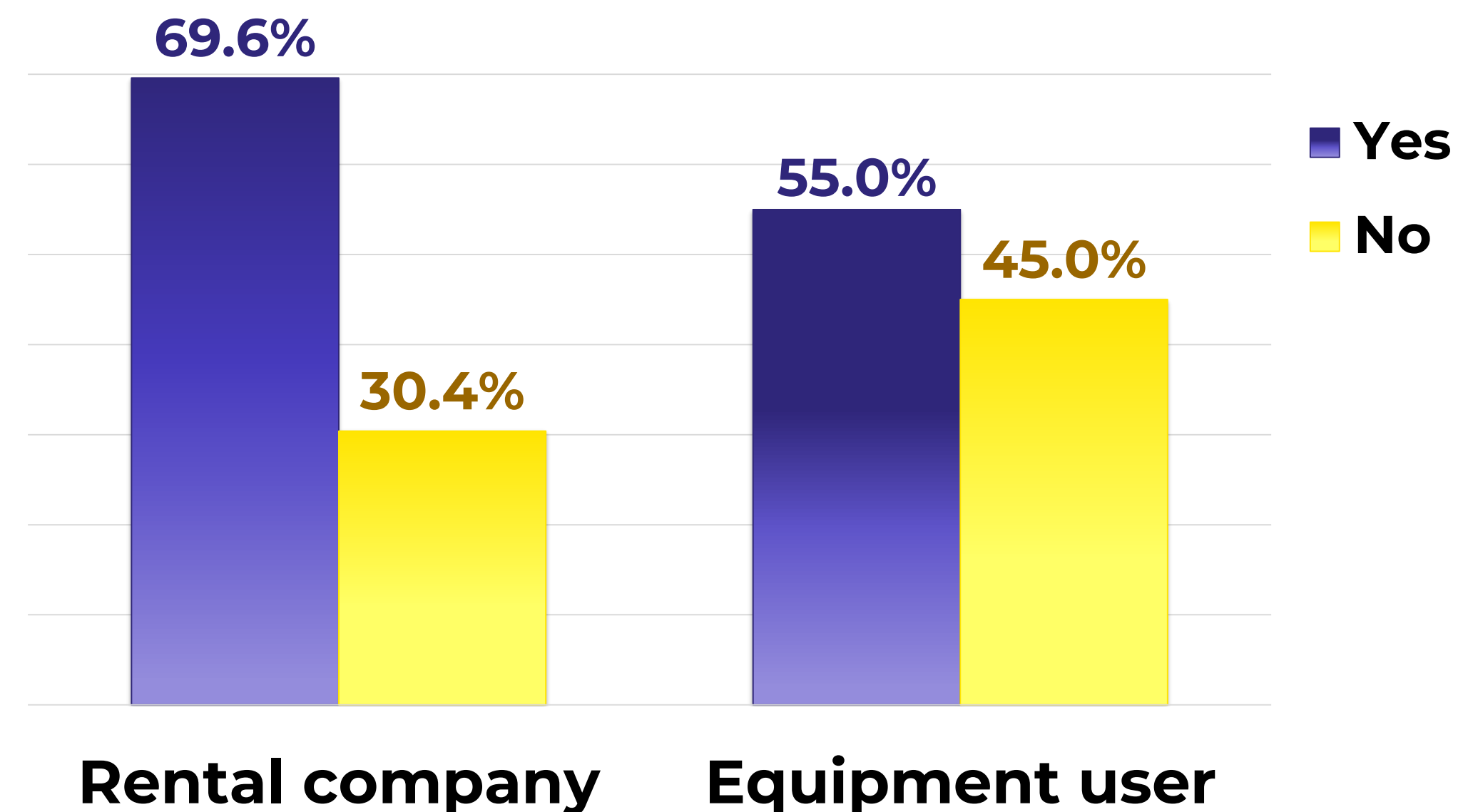
Have you or your company ever rented a machine for business purposes?

— 51,2 % of equipment users rent equipment, rarely or regularly



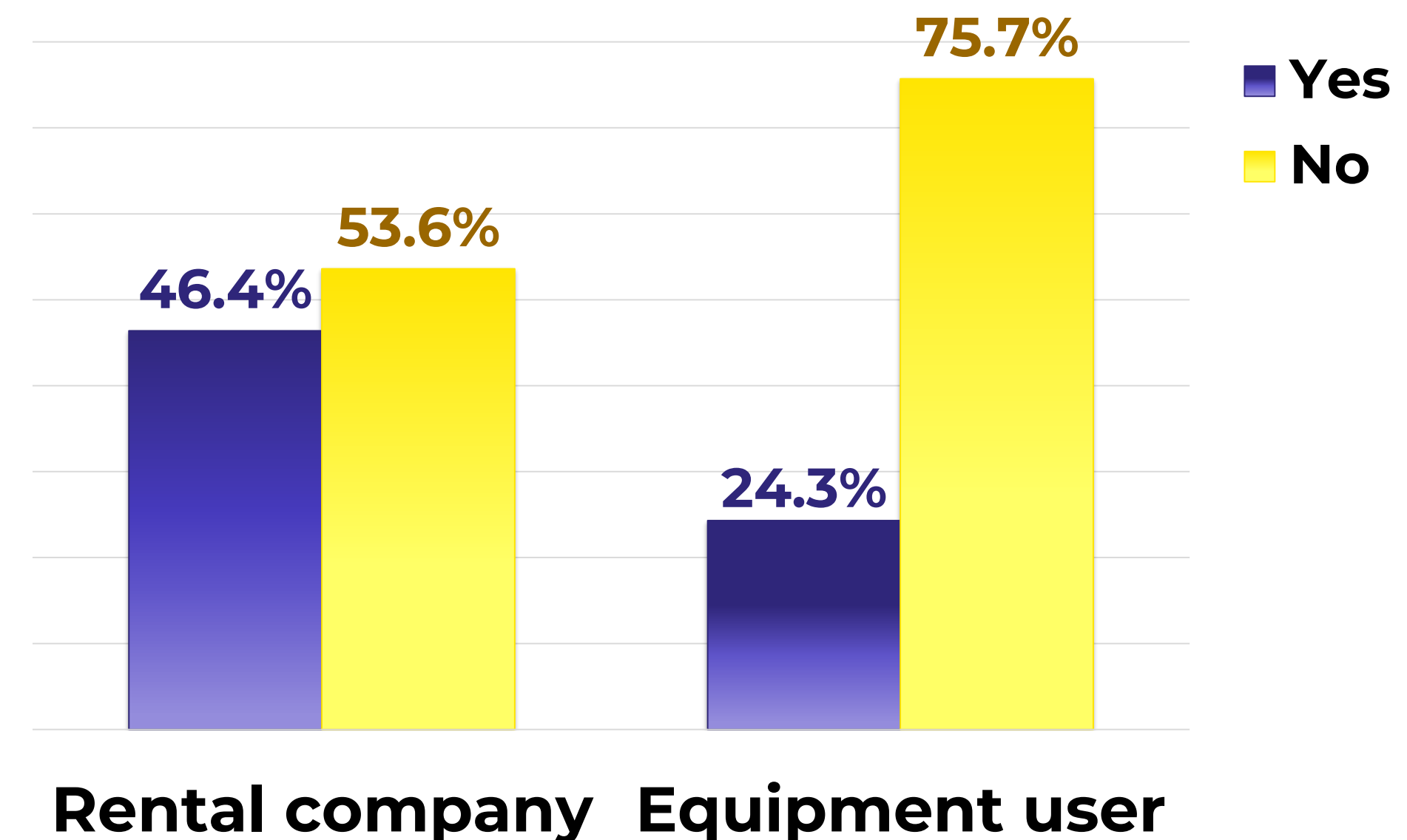
Are you aware of any upcoming environmental legislation, whether national or European, that will impact your business?

- As industry insiders almost 70% of rental companies are aware of upcoming environmental legislation with a potential to impact their core business
- The awareness is much lower among equipment users – 55%
- The difference could possibly speak for a lack of information from public authorities
- Alternatively, the people claiming they are not aware could not see the effect of the legislation to their business



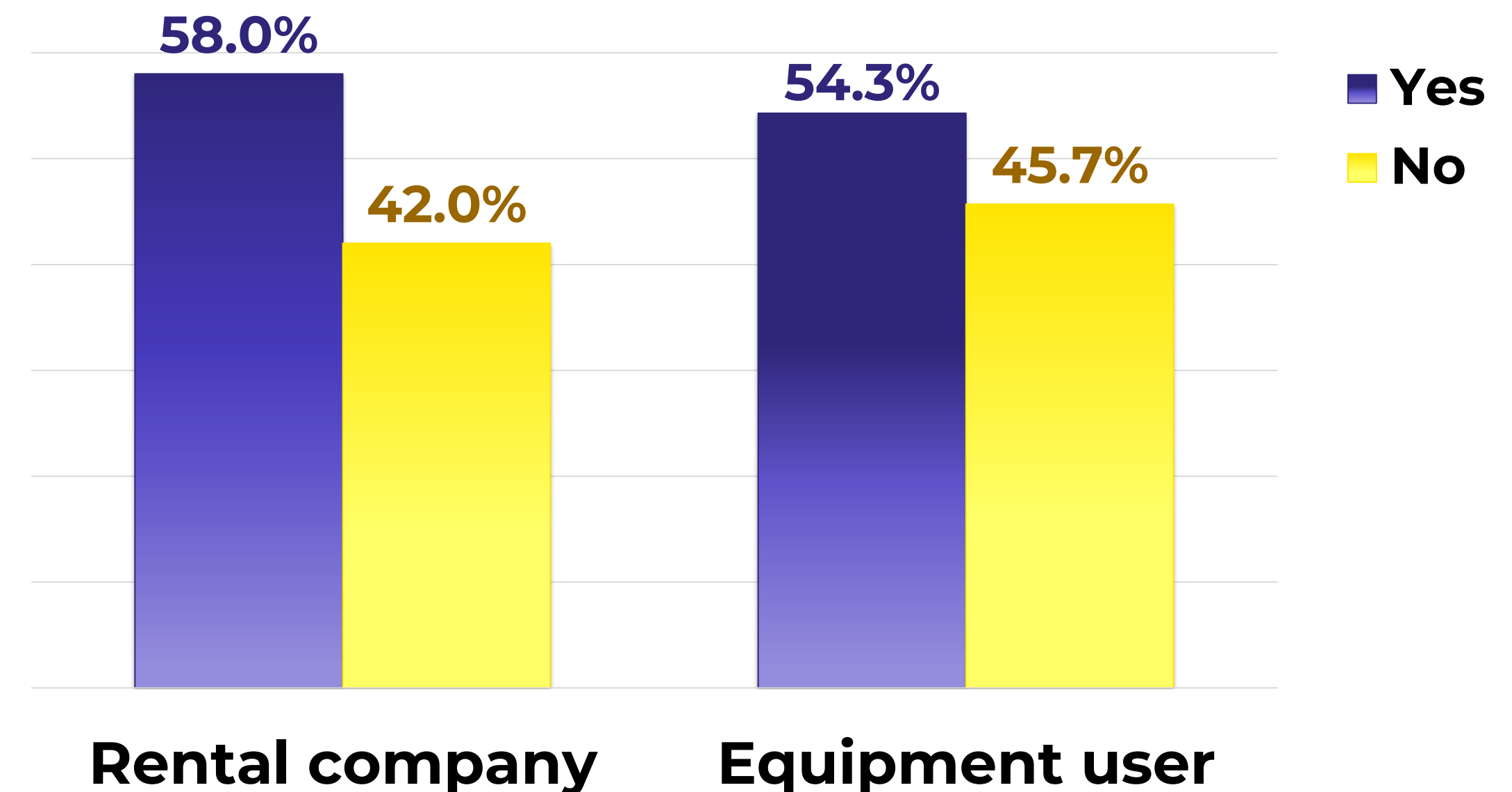
Do you need information or support to prepare for the implementation of new regulations?

- Of the people that are aware the upcoming regulations would affect their business, still some need more information or support for the implementation of new regulations
- Among rental companies, there are almost a half of such people
- The numbers for equipment users are almost halved by 24,3%



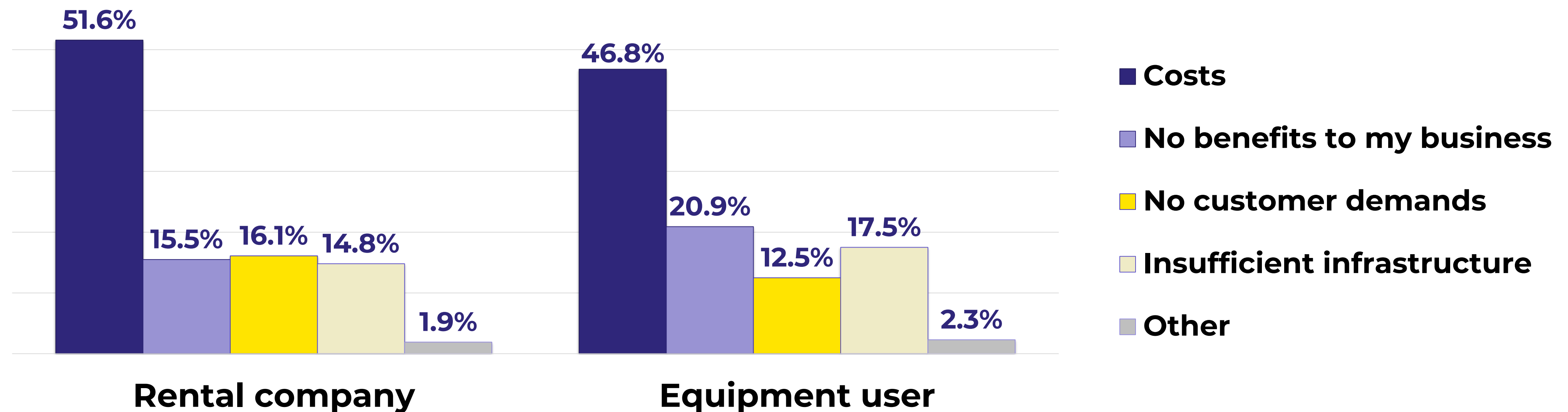
Has your company already started the transition to greener equipment?

- In general, more than half of companies, regardless of activity sector already started the transition to green equipment
- The difference between rental companies and equipment users is not even 4%
- The higher rates for rental companies could be also a bit a result of their reaction toward expectations among their potential customers



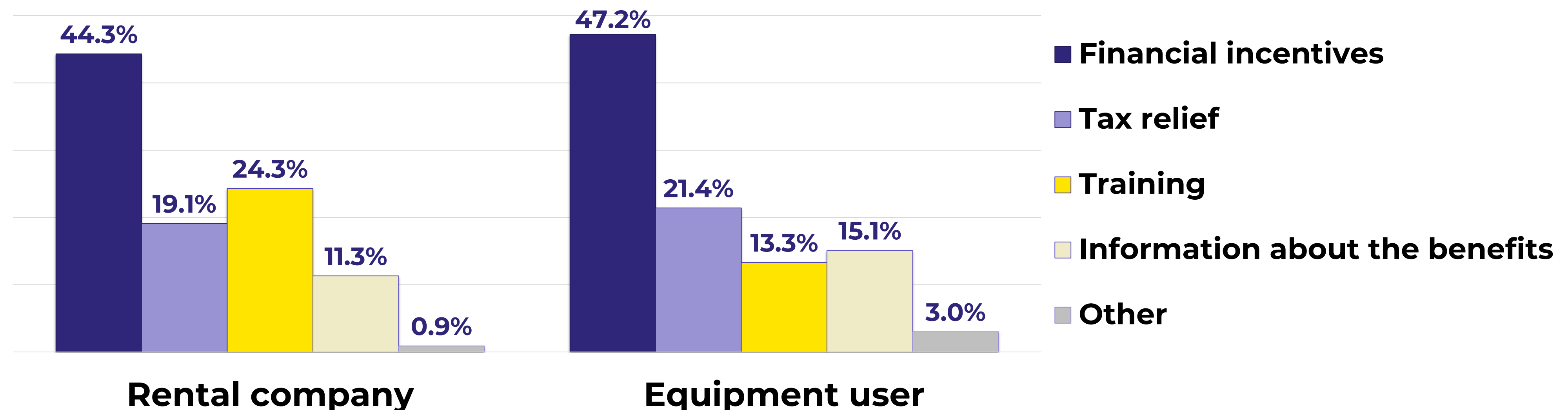
What are the obstacles/ challenges to transitioning to greener equipment?

- Based on this survey replies, for both groups of people costs are the greatest obstacle to transition to green equipment
- Lack of benefits, no customer demands, or insufficient infrastructure were chosen also by about 15% of rental company representatives



What kind of help would you need to transition to greener equipment?

- As costs were identified as the greatest obstacle by both groups, in both cases financial incentives are considered by more than 40% as the biggest relief
- Tax relief is a kind of support that would be appreciated by more than 20% of equipment users.
- Almost a quarter of rental companies would also appreciate more training, another 20% tax relief



Which upcoming environmental legislation can you name?

Global answers

