



# BVRLA Vehicle Rental Credentials 2024



Produced in association with:





## Foreword

**Rental vehicles are the worker bees of the transport system. Unglamorous and largely out of sight, they are essential for the survival of their ecosystem – UK society.**

**Anyone making a significant journey on the road network will pass dozens of unbranded rental vehicles. Cars getting tourists to their destinations or front-line public sector workers to their shifts. Vans delivering supplies to our schools and hospitals or helping workers to repair and maintain our critical infrastructure.**

With its inherent flexibility and a client base as diverse as the UK itself, the vehicle rental sector is a bellwether for business and consumer confidence and shifts in transport behaviour.

Fleets shrank during the movement restrictions of the COVID pandemic, but rental was still relied on to provide essential services and transport key workers. It then weathered the impact of a turbulent automotive supply chain that saw a shortage of new vehicles and huge increase in their prices.

These particular trials are now receding and the sector is once again looking forward. The future is still daunting, with huge challenges around decarbonisation and the evolution of shared mobility. This report captures the vehicle rental sector's impact and the scale of its contribution to the UK's economy and society. Rental is a proactive, innovative industry that policymakers should work with to unlock fairer, more sustainable and affordable mobility in Britain.





# At a Glance



## Resilience:

Keeping Britain moving

- Reliability and flexibility are the key vehicle rental benefits.
- At just over one year-old, the average rental cars is 8 years younger than the average privately owned vehicle.
- Nearly half (48%) of trips whilst using rental vehicles are for day-to-day activities involving healthcare, childcare, and education.
- The use of rental vehicles for day-to-day activities is higher than for work purposes (28%) and holiday and leisure journeys (15%) combined.
- Most of the UK's Critical National Infrastructure sectors rely on vehicle rental.



## Productivity:

Helping Britain grow

- Vehicle rental offers a lifeline for UK businesses, particularly SMEs.
- 58% of car hire and 82% of van hire is with business customers.
- 50% of business rental is with SMEs. Of those, 82% of businesses with 11-50 employees rely fully or partially on vehicle rental.
- 35% of businesses reported using vehicle rental to free-up cash for other priorities, and 40% say rental reduces operational burdens.
- 39% of businesses say rental helps them manage their grey fleet.



## Environment:

Delivering sustainable mobility

- Rental helps to reduce transport emissions, reliance on private vehicles and reticence about using EVs.
- The use of car rental over private vehicles saves over 25,000 tonnes of CO2/year.
- Access to vehicle rental contributed to the disposal of more than 90,000 privately owned cars in the last year.
- One third of vehicle rentals are used in conjunction with another type of transport, with 48% of these being public transport, cycling, or walking.
- Businesses reported they would buy extra vehicles if rental wasn't an option – SMEs would need an average of seven more, and large firms an average of 54.

# The Report



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# Introduction

## Welcome to the BVRLA Vehicle Rental Credentials Report 2024.

Produced in conjunction with PA Consulting, we have researched the industry, spoken to its leadership and surveyed its customers to explore the changing face of vehicle rental, as well as understanding the role it plays in Britain today.

The findings are compelling.

The vehicle rental sector is significant in its own right, employing over 30,000 people, with a fleet of around 450,000 cars and vans, operating at over 1,500 branches in every part of the UK.

But the impacts and influence of the sector reach far and wide; across all sections of the economy and supporting all aspects of everyday life.

We have summarised the impact and influence of the vehicle rental sector into three main areas, articulating its role in:



### Resilience:

Keeping Britain moving



### Productivity:

Helping Britain grow



### Environment:

Delivering sustainable mobility

These themes are used as the structure for the report below, with a chapter on each that sets out our conclusions as well as presenting evidence from our research.

The report is a useful source of insight for the industry, its customers and policy makers. We will produce updates to this report in the years ahead, so we can track over time the themes identified and the contribution the sector makes to the British economy and wider society.



# Methodology

**The report has used a combination of quantitative and qualitative data to provide insight on the status of the British vehicle rental market.**




- A BVRLA Member Survey, which gathered operational data from seventeen BVRLA member organisations representing 69% of the UK car rental fleet and 71% of the van rental fleet. It collected information on fleet composition, number of rentals, mileage, the characteristics of business customers, geographical scope and more.
- A Rental Customer Survey, which gathered information and insight from 1251 recent customers of rental services in the UK. The survey was in two parts: one distributed to BVRLA members for use with their customers; and another administered by survey specialists Dynata. The survey included some routing of questions, so that respondents could provide answers on topics that related more directly to their type of usage of rental services.
- BVRLA Corporate Interviews, which were conducted with senior executives from 11 different BVRLA members, from across the rental industry. These gathered insights on the industry's view of itself, its challenges, customer trends and future outlook.

Strict standards were applied to protect personal and commercial data confidentiality at every stage.

We are grateful to NimbleFins<sup>1</sup> for allowing us to use their analysis of UK average car CO2 emission for the purposes of fleet emission comparisons.

<sup>1</sup> <https://www.nimblefins.co.uk/average-co2-emissions-car-uk>

## Sections

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# Resilience: Keeping Britain Moving





# Resilience: Keeping Britain Moving

People often associate vehicle rental with holidays – a car collected from the airport, or the people-carrier with luggage space rented for a long-distance trip to the Scottish Highlands or Cornish seaside.

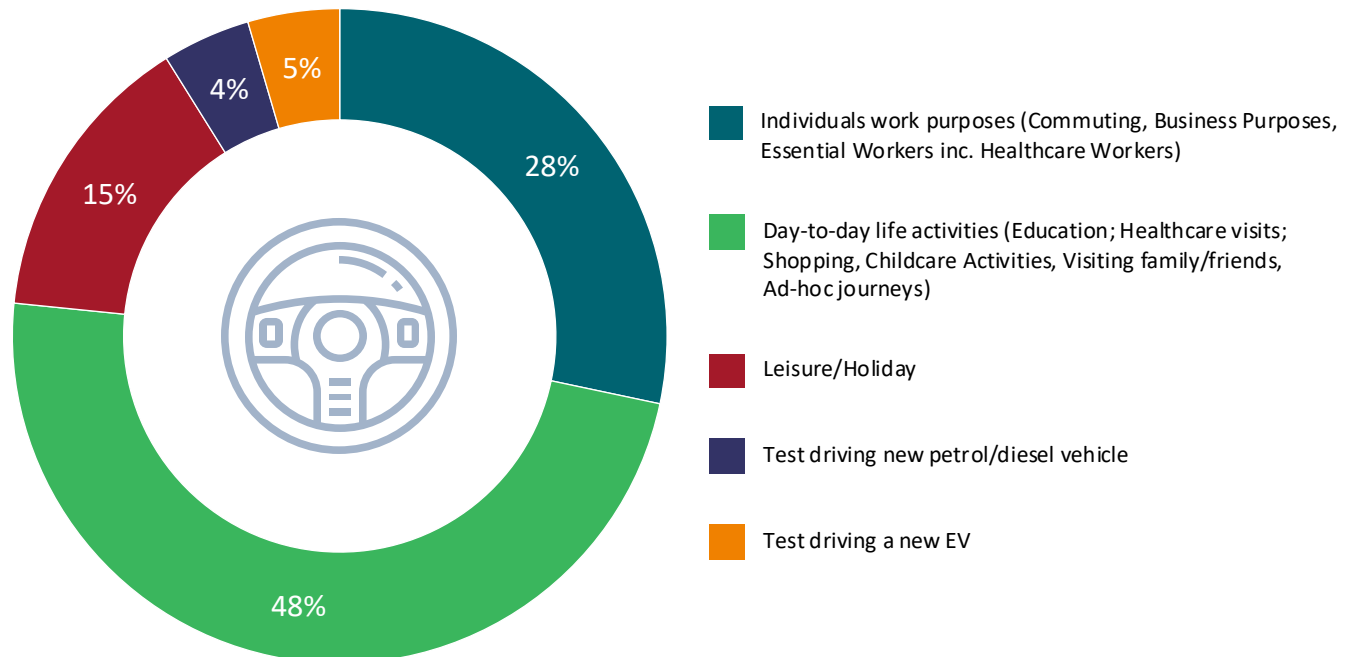
Vehicle rental is an essential enabler of UK tourism, helping travellers to reach and explore places that public transport cannot.

Our study shows that the vehicle rental sector's contribution to everyday life goes much deeper. It provides a vital source of flexible mobility and is an integral part of a resilient Britain.

## How people use rental vehicles

Responses to our customer survey show that nearly half (48%) of trips made whilst renting a vehicle are for day-to-day life activities. This use case accounts for more trips than work purposes (28%) and holiday and leisure journeys (15%) combined.

Figure 1: The journeys people make with rental vehicles (% of trips completed)



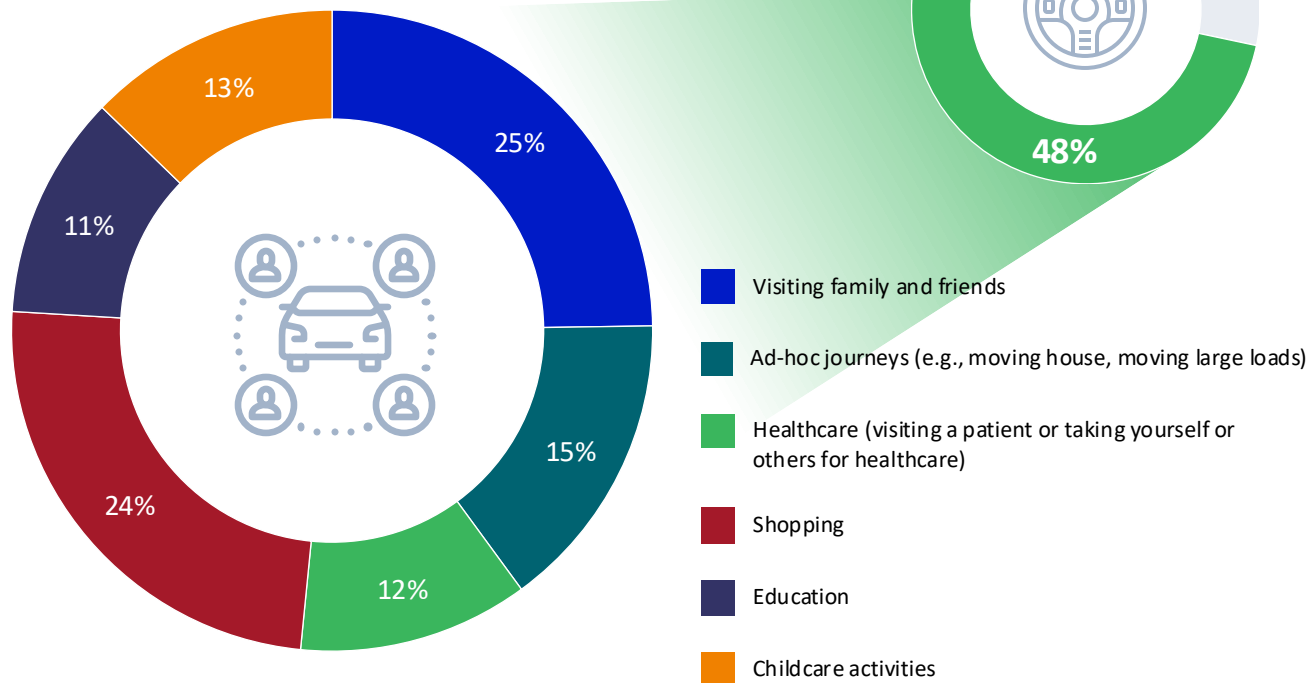




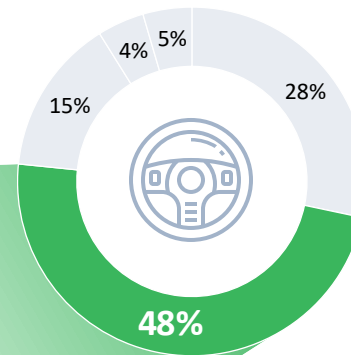
# Resilience: Keeping Britain Moving

We will dig further into the use of rental vehicles for business in section 2 below on Productivity, but expanding on 'day-to-day' activities in Figure 2 is revealing.

**Figure 2: Breaking down typical day-to-day rental journeys**  
(% of trips completed)



**Figure 1**



We see a number of critical activities supported, including healthcare trips (12%) and education (11%), demonstrating that for many people, vehicle rental sustains essential daily functions.

An important reason for these observations is that rental vehicles are frequently used as breakdown cover or as replacement vehicles following an accident. In all of these instances, the rental vehicle simply becomes part of the plumbing of everyday life, allowing work and leisure users to minimise disruption and continue their activities as before.

When we filtered respondents who had specifically flagged that their rental was as part of breakdown or replacement cover, unsurprisingly the percentage of trips increased yet further for both work purposes (up to 30%) and day-to-day life activities (52%).



# Resilience: Keeping Britain Moving

## Rental Vehicles for National Resilience

The UK Government’s definition of resilience refers to an ability to withstand or quickly recover from a difficult situation, but also to get ahead of those risks and tackle challenges before they emerge. Evidence from multiple data sources in this study illustrates the significant role the vehicle rental industry plays across both these critical capabilities.

In terms of coverage, the types of organisations supported by vehicle rental include almost all sectors considered to be Critical National Infrastructure (CNI), i.e. those facilities, systems, sites, information, people, networks, and processes necessary for a country to function and upon which daily life depends. This includes the NHS, emergency services, social care, local and central government; defence; the food, energy, and communications industries and of course transport, amongst others.

All these sectors turn to rental when they need quick access to vehicles that they do not need to own the whole year round – in times of high demand, emergencies, or other unpredictable situations.

Indeed, during COVID-19 lockdowns, the vehicle rental industry was deemed an essential service.

“ During Covid public transport was limited across the UK so we supplied over 450 vehicles, including 200 nine-seaters, to NHS employees and key workers free of charge, who may have otherwise had difficulty getting to work.”

**Margaret Speirs**  
Group Rental Director, Arnold Clark

Reliability and flexibility of the rental fleet are the core reasons that people and businesses use the industry to enable resilience. When urgent demands arise, or things go wrong through strikes or other travel disruptions, the rental industry can provide a continuity of service to keep people and goods moving, and the nation’s infrastructure running.

A commonly reported feature of the attraction of rental in such circumstances is that the vehicles provided are young and well-maintained, meaning that when people turn to the industry for support, they are unlikely to let you down.

Rental fleet average car age 2024

**1.3 Years**

UK total car parc average age 2023

**9 years**

(Source: SMMT)

It is interesting to compare these figures with the average age of vehicles in the rental industry from 5 years ago.

Rental fleet average car age 2018

**1.1 Years**

UK total car parc average age 2018

**7.9 years**

The rental industry has seen a slight increase in average vehicle age, largely due to the constraints in the automotive industry’s supply chain in recent years, but the aging of the overall car parc on the roads in the UK is more pronounced. As such the ‘relative youth’ of the rental fleet is increasing over time.

## In summary

This section has highlighted how the services provided by the vehicle rental sector touch all aspects of life, society, and business. From leisure to well-being, healthcare to education, commerce to public service, individuals and companies utilise vehicle rental to help them manage complicated situations and keep Britain moving.



# 2

## Productivity: Helping Britain Grow



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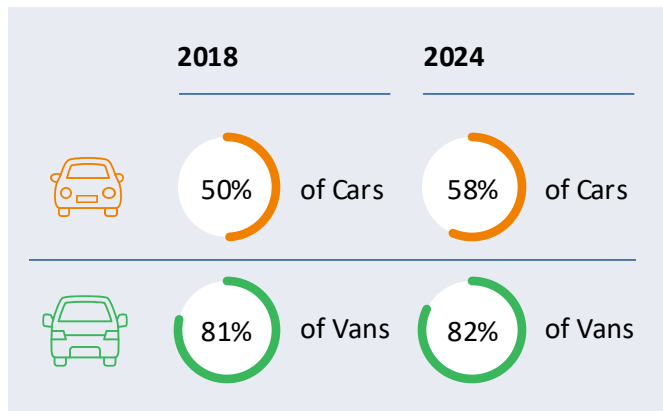


# Productivity: Helping Britain Grow

**With a combined fleet of nearly half a million vehicles, and employing tens of thousands of people, the vehicle rental sector makes a substantial contribution to the UK economy.**

It is a major buyer of vehicles and support services and a valuable tax contributor to the Exchequer. Looking beyond the sector itself, this section examines the other businesses it serves. Our survey shows that 58% of car hire was with business customers, rising to 82% for vans, a proportion increasing over time. The rental sector supports business of all sizes and plays an integral role in their operations, efficiency, productivity, and growth.

**Figure 3: Rentals for business customers**



## The last five years

It is interesting to look at how the scale of the UK rental vehicle sector has evolved over the last 5 years.

**Figure 4: Total rental fleet numbers**

	2018	2019	2020	2021	2022	2023
Car	281,920	274,930	188,358	186,387	222,272	228,341
Van	168,970	181,998	195,555	205,810	218,690	214,706

We can see from this progression in vehicle numbers a story of initial growth, as well as the constraining impact of COVID-19 and global automotive supply chain shortages suppressing volumes in 2020 and 2021, particularly on cars. Growth is now returning, albeit at a lower level. The expansion in vans is striking, with a growth of over 27% in this timeframe.

With this trend in business use of rental vehicles, it is essential to look at the characteristics of the commercial and business customers who are served by the sector.

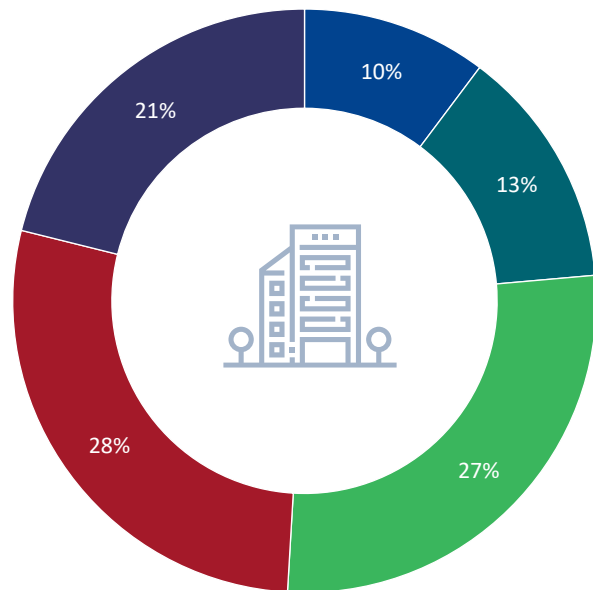


# Productivity: Helping Britain Grow

## Supporting business of all sizes

Respondents were evenly spread across all business sizes; just over 50% were from Small and Medium-Size Enterprises (SMEs) i.e., those organisation with up to 250 employees.

Figure 5: Size of company worked for (% respondents)



- 1-10 Employees
- 11-50 Employees
- 51-250 employees
- 251-1000 employees
- More than 1000 employees

Respondents also told us just how deeply integrated the use of rental vehicles was in their operations.

Figure 6: How companies of different sizes rely on rental (% of organisations)

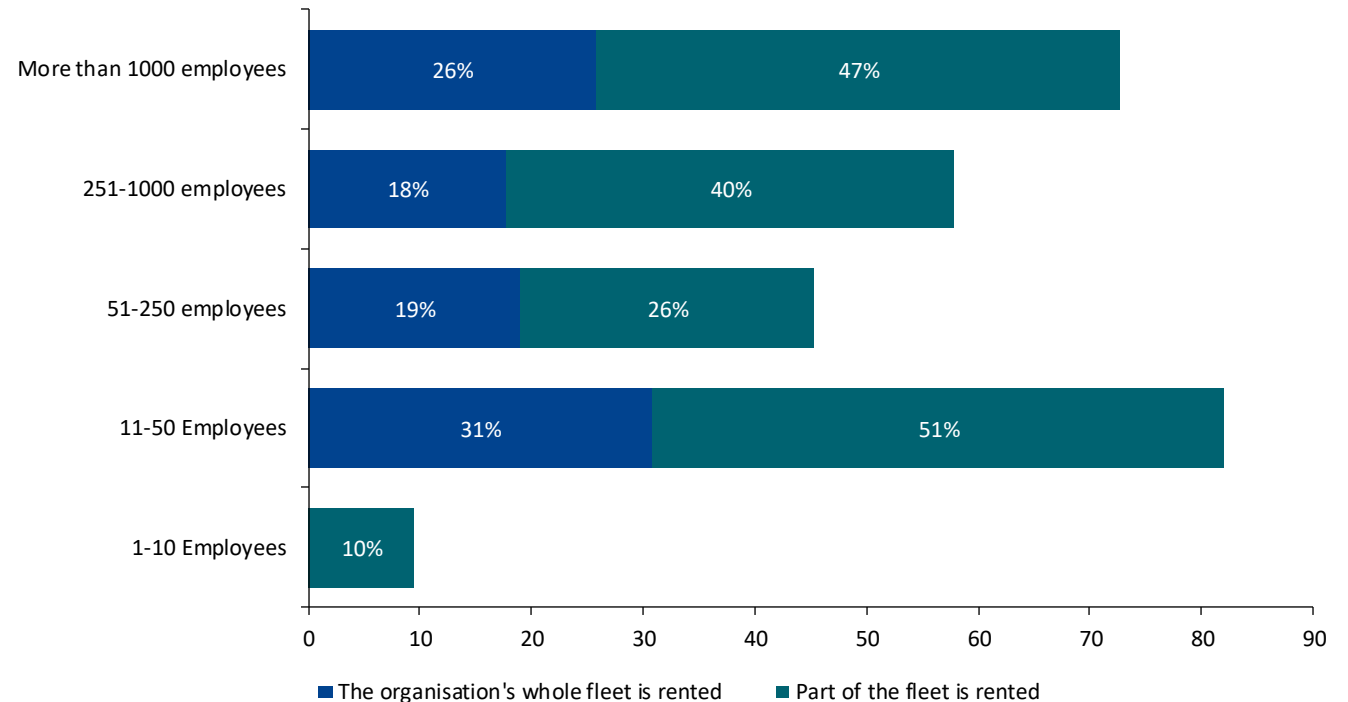


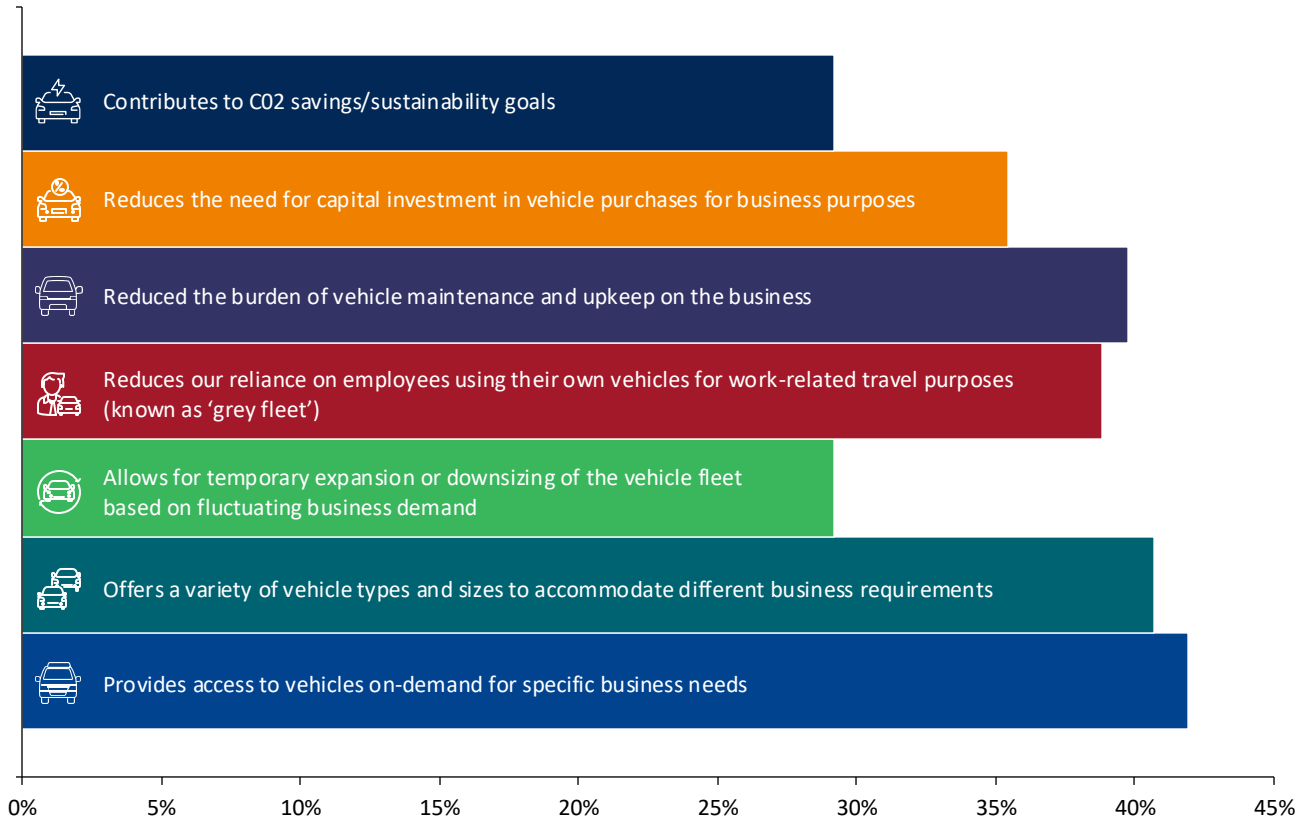
Figure 6 illustrates that vehicle rental performs a key role for all sizes of organisation, with some relying on vehicle rental exclusively for their transport needs. This was most pronounced in organisations of 11-50 employees, where 82% reported that they rely fully or partially on vehicle rental.



# Productivity: Helping Britain Grow

## Why do businesses choose rental?

Figure 7: The commercial benefits provided by renting vehicles (% of responses)



As figure 7 demonstrates, businesses use vehicle rental for a wide variety of financial, operational and environmental reasons.

From a financial perspective, many businesses – particularly SMEs – use rental as a flexible, off-balance sheet and fixed cost way of managing their transport requirements. Over 35% reported that rental provides the facility for accessing vehicles without a major capital investment. A further 40% reported that rental also reduces the financial as well as operational burden of vehicle maintenance and upkeep.

“Major retailers and logistics providers rely on us for vehicles during peak seasons like Black Friday and Christmas. We supply thousands more vans through our services, meeting their high demand, ensuring the supply chain keeps moving.”

**Sam Patel**, Assistant Vice President  
Rental UK&I, Enterprise

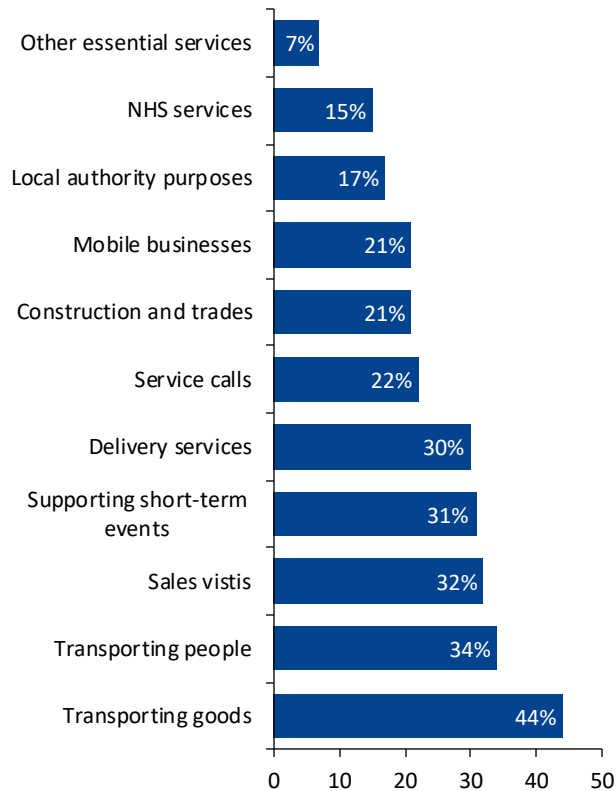
Managing 'grey fleet' is a significant motivation (for 39% of respondents). This is where businesses use car or van rental as an alternative to paying staff to use their own, often older, higher-emitting and less well-maintained vehicles for work purposes. Grey fleet use across the public and private sector is increasingly coming under scrutiny as organisations are pressurised to improve the cost and sustainability of their ad-hoc business travel.



# Productivity: Helping Britain Grow

The diverse operational benefits of using rental appear as a strong thread in this section, as demonstrated by Figure 8.

**Figure 8: What purposes do organisations rent vehicles for? (% of responses)**



Some of these business uses may occur regularly (such as sales or service calls), but many will be on a cyclical or intermittent basis.

Cars and vans are expensive and for many it makes no sense to have these costly assets parked-up and maintained, yet poorly utilised. Vehicle rental allows businesses to deliver better capital and resource efficiency, along with improved operational flexibility and effectiveness. For example, in our interviews, commonly cited customer examples that bring these categories to life include growing the fleet to meet higher demand for deliveries around Christmas or Black Friday; servicing major sporting or cultural events and festivals; enabling the right vehicles to be present at each phase of construction projects; supporting the media and creative industries on location; and even supporting the roll out of public infrastructure and social services.

“The digital economy is driven by connectivity, and the connectivity cannot be there unless a white van turns up somewhere to put that connectivity in.”

**Simon Ridley**  
Managing Director, Dawson Group Vans.





# Productivity: Helping Britain Grow

## A word on geography

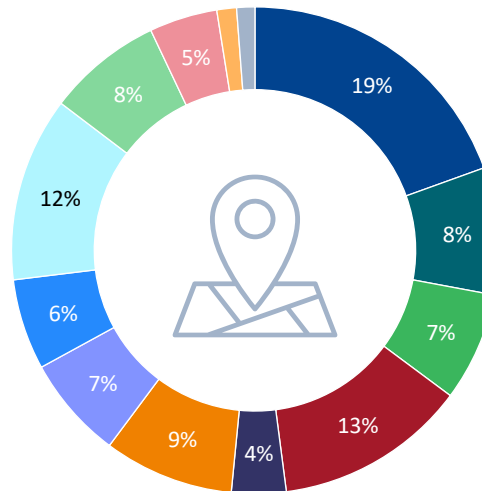
Vehicle rental serves as a catalyst and enabler for business and leisure activity beyond major metropolitan areas, extending accessibility across the United Kingdom. This aspect holds particular importance for areas that lack adequate public transportation infrastructure, often where tourism drives local economies.

“Rental allows businesses to access newer, cleaner, and well-maintained fleets without the need for large capital investments in vehicles.”

**Sam Patel**  
Assistant Vice President  
Rental UK&I, Enterprise

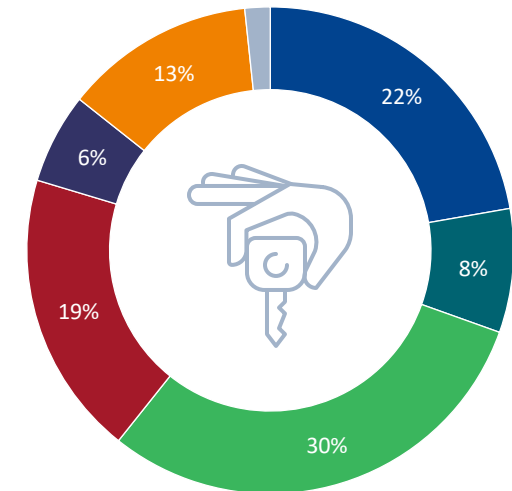
Figures 9 and 10 demonstrate that vehicle rental is used in every region of the UK and across all types of rental branch locations. A high proportion of rental usage is in the capital, from airports, and inner-city branches, as may be expected. Rental is far more than this, with a quarter of vehicles collected from out-of-town or rural locations. This demonstrates the contribution of rental to a connected transport system across Britain’s regions.

Figure 9: The location of our survey respondents (% of respondents)



- London
- SW England
- West Midlands
- NW England
- NE England
- Yorkshire & Humber
- East Midlands
- East of England
- SE England
- Scotland
- Wales
- N. Ireland
- Outside UK

Figure 10: Where do people start and end their rental journeys? (% of responses)



- Airport
- Transport hub
- Inner city rental branch
- Out of town rental branch
- Rural rental branch
- Vehicle was delivered to home or work
- Other





# Productivity: Helping Britain Grow

## In summary

Whether it is delivering essential transport for infrastructure requirements like 5G networks and new housing, enabling seasonal activities including festivals and Black Friday or responding to long and short-term crises such as pandemics or train strikes, vehicle rental has and continues to be a lifeline for UK business.

In an era of increasing economic, environmental, technological and political uncertainty it provides vital flexibility by giving businesses access to the right transport at the right time.

It can provide enormous financial benefits by giving organisations access to the newest, safest and cleanest vehicles at a fixed cost, freeing up precious capital that can be used to invest elsewhere in their business.

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“ Rental provides a solution to contract commercial work where there is no longevity to vehicle usage after a certain point. Rental provides flexibility that enables on-time delivery of infrastructure projects, a vital contributor to the UK economy.”

**Simon Ridley**

Managing Director, Dawson Group Vans.

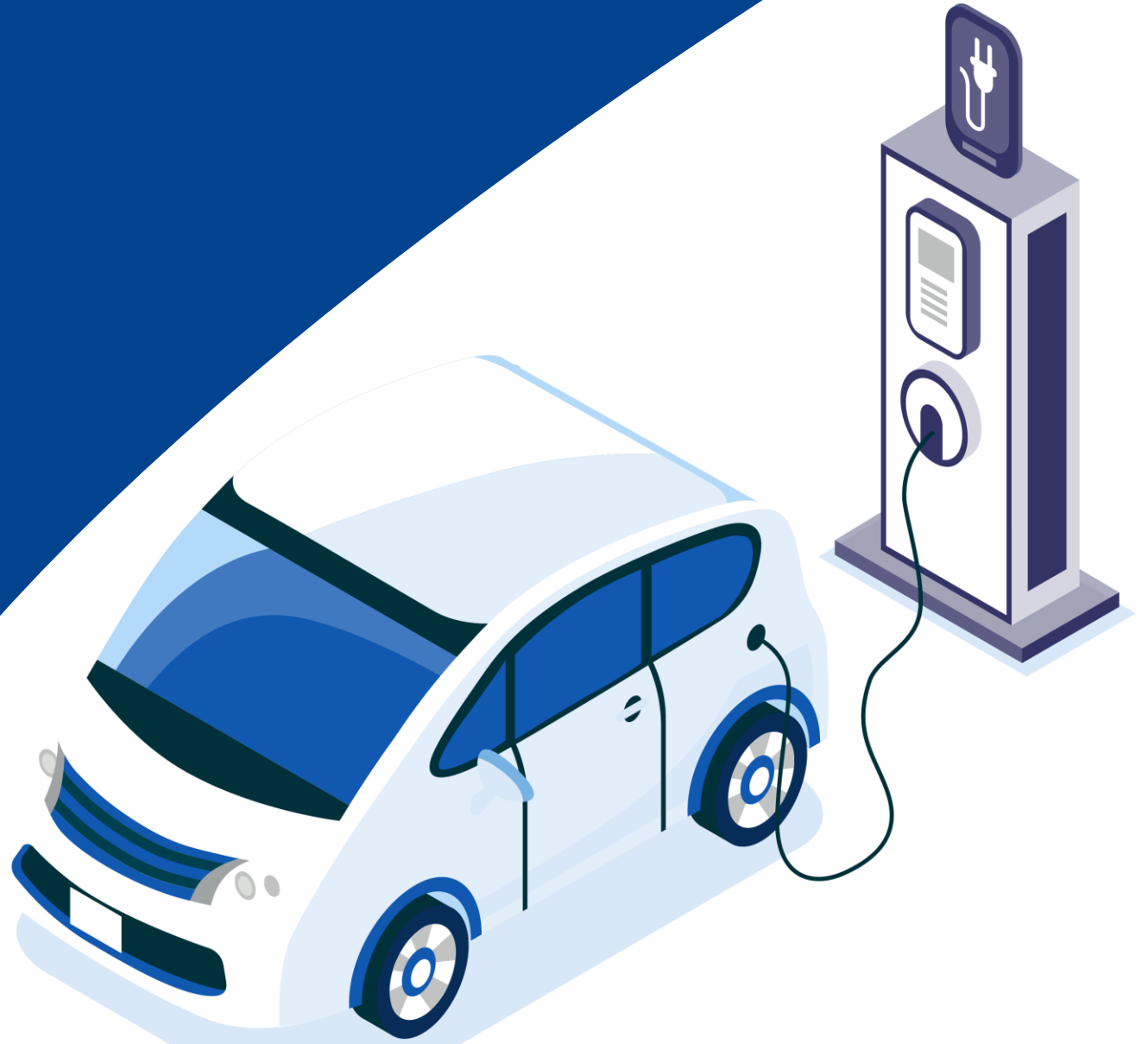
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# Environment: Delivering Sustainable Mobility



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# Delivering Sustainable Mobility

With hundreds of thousands of cars and vans used by millions of customers to travel billions of miles per year, the vehicle rental industry clearly has plenty of ‘skin in the game’ when it comes to transport decarbonisation. In this section we explore how the vehicles and services offered by vehicle rental are helping to positively shape behaviours, reduce carbon emissions, and support more sustainable journeys.

## Car fleet changes

Around 10% of the car rental fleet has a plug – either fully electric or hybrid – well ahead of the 5% share seen in the overall UK car fleet. The battery electric share of the car rental fleet has risen 200% since 2022 and now stands at 4%.

Most noticeable from figure 11 is the growth in petrol cars and the collapse of diesel as a fuel type. This matches wider market sentiment, with diesel’s new market share in the UK dropping to only 6.2% in the SMMT’s most recent figures. The car rental fleet is renewed frequently, meaning that air quality benefits of this change have had an almost instant impact.



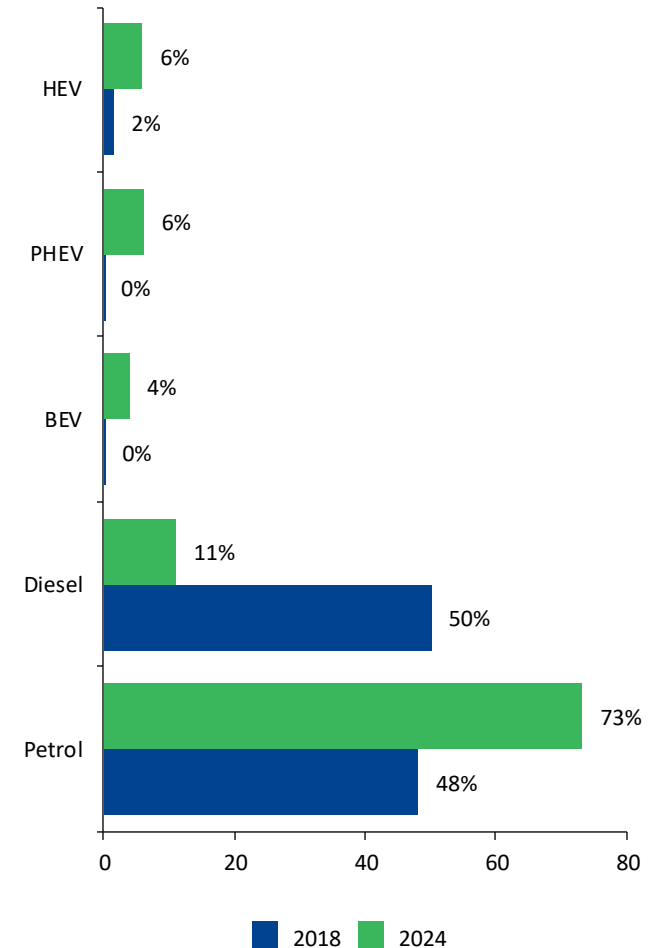
This means that an average day spent in a rental car saves 0.3 kg of CO2 compared to the average privately owned car.

Over an average rental period of 8.6 days, this amounts to a total saving of 2.6 kg of CO2, equivalent to a mature tree absorbing CO2 for over 6 weeks.

With average CO2 emissions of 125.9 g/km, the rental car fleet is lower than that of the average car on UK roads at 132 gCO2/km.

Scaled up across the entirety of the rental car fleet, this makes a substantial annual CO2 reduction. Our operator survey showed that the average rental car does over 11,000 miles per year. Across the whole car rental fleet this equates to a saving of over 25,000 tonnes of CO2 per year when compared to the average UK car. Coupled with the fact that the rental sector’s newer, safer, well-maintained, mostly petrol fleet will also lead to reduced air pollution, these are tangible contributions to national environmental goals.

Figure 11: Car rental fleet fuel types (% of total rental fleet)





# Delivering Sustainable Mobility

## Rental vehicles as part of a lower carbon lifestyle

The rental sector's carbon reduction contribution is more sophisticated than simply counting molecules saved. Perhaps more profound is its influence on its customers' travel behaviours.

For some customers, the ability to access multiple vehicle types through rental can help them maintain lower carbon behaviours and encourage the adoption of EVs more generally. For example, some businesses and consumers have only made the jump to choosing an EV because they feel safe in the knowledge that they can still rent a petrol car or van for the occasional long-distance, time-sensitive, or large load capacity journey.



Over 25,000 tonnes of CO2 saved through the use of newer, well maintained, more efficient vehicles

“ We're seeing customers moving from having two cars in the family to one car, and then supplementing with a rental car at certain times. They recognise an EV covers 80-90% of their needs, and they rent for the times it doesn't.”

**Andrew Smith**

SVP/ Managing Director UK, SIXT





# Delivering Sustainable Mobility

## Vehicles on the road

With a zero-emission fleet share of only 2%, vans are proving the hardest portion of the vehicle rental market to decarbonise.

Van users are less willing and able to compromise on vehicle performance, range, and cost, and so the challenges associated with using electric vans are harder to overcome. At present, the lack of van-accessible EV infrastructure is a particular challenge, and the van user base has limited access to home charging. This pain point is compounded by an inadequate choice of vans capable of carrying larger payloads, with longer ranges, and taking a faster charge. Additionally, our interviews and workshop data reveal that many rental customers don't realise an EV might meet their needs. This lack of awareness and understanding presents another barrier to adoption.

Despite this there are some fantastic examples of rental firms working with customers to look at where they can make a shift to zero emission vehicles.

“We offer our customers a complete package that includes electric vans, maintenance, charging infrastructure, and associated power supply upgrades. Where suitable electric vans do not yet exist we even collaborate with manufacturers to create bespoke electric vehicles for our customers' specialised needs”

**Neil McCrossan**

Managing Director UK & Ireland, Northgate  
Businesses





# Delivering Sustainable Mobility

To explore more deeply how rental interacts with wider vehicle use and travel behaviours, we asked private rental customers what kind of fuel their vehicles use at home. We then compared this with what kind of fuel they wanted in their rental vehicle. Whilst this is only a small sample, 20% of survey respondents who reported having an EV at home expressed a preference for an ICE rental vehicle.

Reasons for choosing rental vehicles over other types of transport are dominated by convenience and efficiency factors (see Figure 12). A commonly reported hesitancy for moving to an EV is occasional trips where an EV might not be suitable, e.g., long-distance journeys or where larger carrying capacity is required.

Interestingly, 25% of EV owners chose rental over other transport to meet specific needs and requirements. This supports a hypothesis that rental allows individuals to transition to owning an EV while maintaining the option to use an ICE vehicle on an as-needed basis.

There are other ways that we observed our survey respondents using rental vehicles to facilitate lower carbon ways of getting around.

For example, it emerged that in 34% of vehicle rentals, the customer was using rental in conjunction with another type of transport, with rental being only one link in the chain of getting from A to B. In 48% of these cases, the customer made a connection with

**Figure 12: Reasons people select rental above other transport types (% of responses)**



sustainable transport, i.e., public transport, cycling or walking, for another part of their journey.

Our research showed that rental can play a role in the shifting patterns of private vehicle ownership. Most people who use rental services own a similar number of vehicles to the general population, but 10% of our respondents reported that they had removed a vehicle from their household in the previous 12 months and did not replace it. Of these, 50% cited the availability of rental services as one of the key reasons for not replacing the vehicle.

Were this ratio to be scaled up over the whole population of private users of vehicle rental in the UK, it could mean that over 90,000 household cars may have been disposed of, at least partially enabled by access to vehicle rental, in the last year. This reduction in the UK car parc could also bring sizeable carbon savings.

Finally, many of our business respondents told us how many additional vehicles they would need to purchase if rental was not an option. SMEs indicated they would need to acquire an average of seven extra vehicles. Large organisations (with 1000+ employees) reported needing to purchase an average of 54 additional vehicles, with some needing 100s of extra vehicles. This highlights the powerful environmental benefits of rental in enabling a 'usership' rather than ownership approach to their vehicle management.



# Delivering Sustainable Mobility

## The vehicle rental sector as educators

We heard from all our rental companies that currently, demand for ICE vehicles dominates, which was backed up in the customer survey, with 62% of respondents stating a preference for ICE vehicles compared to 15% for EV.

However, we also heard from all the companies about the efforts they make to educate customers on vehicle choices, helping both people and businesses better understand when EVs are right for them. In effect, rental company staff are now on the front line of education in the decarbonisation of the transport sector.

They are also educating and upskilling their staff so that they can give informed and timely advice. Rental companies are installing more charge points in their branches to support this.

Among the 17 rental operators we surveyed, 94% are equipping their branches with a combination of slow, fast, and rapid charge points. To date, 25% of branches are so far equipped with EV charging infrastructure – demonstrating the industry’s investment, commitment, and progress towards a net zero future.



We’ve provided the majority of our branch managers with EVs to promote EV positivity and spread knowledge among our teams and customers.”

**Kevin Rand**

UK Operations Director, Europcar



**94% of rental operators surveyed have commenced their EV charging infrastructure installation journey**



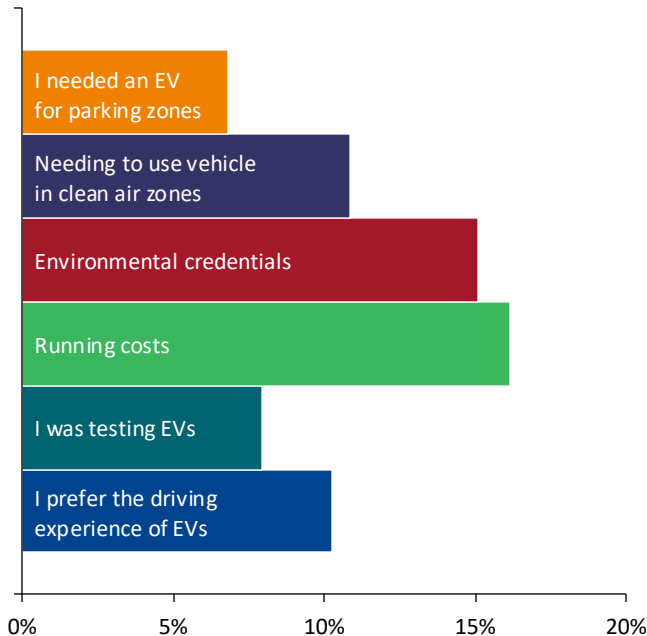


# Delivering Sustainable Mobility

This learning process goes both ways – it also seems that some customers use the rental sector as a means of educating themselves. In our customer survey, we explored both the motivations of customers who wanted to rent an EV, as well as what other customers saw as a deterrent for renting one.

**In figure 13 below, we see that 12% of renters who picked an EV said they were using it as a test-drive before making a purchasing decision.**

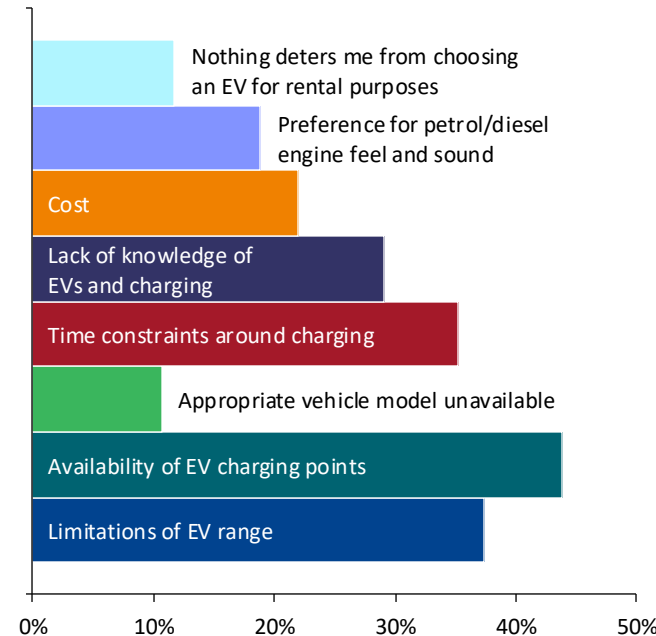
**Figure 13: Motivations for renting EVs**  
(% of responses)



We have bespoke training packages to educate our staff on EVs so they can, in turn, educate our customers on such aspects as operating and charging the vehicles.”

**Andrew Smith**  
SVP/ Managing Director UK, SIXT

**Figure 14: Deterrents from renting EVs**  
(% of responses)



By contrast, we also see the barriers – perceived or actual – that customers report to have deterred them from renting an EV in figure 14. The role of rental as an educator is emphasised again as 29% reported a lack of knowledge to be a limitation to EV usage.

These charts provide some useful insights into how rental companies, employers and policymakers can do more to facilitate the shift to zero emission shared mobility. For example, regulation is clearly influential, with clean air zones and parking requirements cited by more than a quarter of those who choose EVs. In addition, both sets of responses highlight areas where better information and / or intervention may be required, such as on costs or infrastructure.

## In summary

With no government incentives to rely on and a demanding, time-sensitive and cost-conscious customer base, the vehicle rental sector has no easy path to rapid decarbonisation.

This is why it is so important to examine the profile of the rental fleet and the way it is used by customers. Closer examination reveals that this huge, flexible, cost-effective and highly-utilised fleet is already helping businesses and consumers across the UK to reduce their emissions, private car reliance and reticence about acquiring an EV of their own.





4

## Reflections



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## Reflections

**In getting such rich data from the market, we have been able to demonstrate the undeniable contribution the vehicle rental sector makes to UK society, the economy and the need for more sustainable mobility. Our executive interviews also highlighted the way operators are increasingly using digital and connected vehicle technology to better understand customers and reduce their transport costs.**

**Through consistently providing well-maintained, dependable vehicles, the sector provides a reliable form of transport where other modes may falter.**

From rental's place in supporting the UK's daily transportation, to provision of accident and breakdown replacement vehicles, the sector defines resilient transport.

**In providing flexibility to organisations of all types and sizes, the sector enables prosperity through facilitating productivity.**

There is simply no other method by which companies could achieve such adaptable transport to suit their fluctuating operational needs.

**By providing access to clean vehicles, educating users, and facilitating a lower carbon lifestyle – the sector is helping to decarbonise transportation.**

By updating its fleet, supporting customers to make more sustainable choices, and rolling out chargepoints, the rental sector is focused on delivering an affordable and resilient zero emission transition for its customers.

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### Speak with us

If you would like to discuss elements of this report or learn more about our work, please get in touch with us.

[www.bvrla.co.uk](http://www.bvrla.co.uk)  
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# About us

## About PA.

We believe in the power of ingenuity to build a positive human future.

As strategies, technologies, and innovation collide, we create opportunity from complexity.

Our diverse teams of experts combine innovative thinking and breakthrough technologies to progress further, faster. Our clients adapt and transform, and together we achieve enduring results.

We are over 4,000 strategists, innovators, designers, consultants, digital experts, scientists, engineers, and technologists. And we have deep expertise in consumer and manufacturing, defence and security, energy and utilities, financial services, government and public services, health and life sciences, and transport.

Our teams operate globally from offices across the UK, Ireland, US, Nordics, and Netherlands.

### PA. Bringing Ingenuity to Life.

Discover more at [paconsulting.com](https://paconsulting.com) and connect with PA on [LinkedIn](#) and [X](#)

## About the BVRLA.

The BVRLA represents over 1,000 companies engaged in vehicle rental, leasing and fleet management. Our membership is responsible for a combined fleet of four million cars, vans and trucks – one-in-ten of all vehicles on UK roads.

BVRLA members represent the demand-side of the automotive industry, buying around 50% of new vehicles, including over 80% of those manufactured and sold in the UK. In doing so, they support almost 500,000 jobs, add £7.6bn in tax revenues and contribute £49bn to the UK economy each year.

Together with our members, the association works with policymakers, public sector agencies, regulators, and other key stakeholders to ensure that road transport delivers environmental, social and economic benefits to everyone. BVRLA members are leading the charge to decarbonise road transport and are set to register 400,000 new battery electric cars and vans per year by 2025.

BVRLA membership provides customers with the reassurance that the company they are dealing with adheres to the highest standards of professionalism and fairness.

The association achieves this by reinforcing industry standards and regulatory compliance via its mandatory Codes of Conduct, inspection regime, government-approved Alternative Dispute Resolution service and an extensive range of learning and development programmes.

Produced in association with:





## **British Vehicle Rental & Leasing Association**

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