

SUSTAINABLE EVOLUTION

The Europcar Sustainability
Report 2025

Europcar

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FOREWORD

The big conundrum for insurers stepping into the EV marketplace is how to handle customer expectations when it comes to replacement vehicles.

This report looks at EV adoption across the UK and the initiatives Europcar is driving to support insurers as well as fleets, businesses and private motorists as the switch to electric becomes a reality.

In 2024 EVs broke the million barrier on UK roads. With Consumer Duty now a big focus for insurers, it is critical that the replacement vehicle supply chain is fit for purpose for this growing electric vehicle parc. However, EV availability for insurers is still a stumbling block.

Europcar research found that nearly 89% of electric vehicle drivers would expect their insurer to provide a like-for-like vehicle while theirs was being repaired. Insurers can't afford to ignore this expectation. It could become a critical customer service issue – and certainly not one that insurers will want to have to fix. Replacement vehicles form a fundamental component of a motor insurance claim, and a lack of suitable options can be catastrophic for customer satisfaction. In contrast, if the service goes above and beyond expectations it leaves a lasting positive impression.

Relying on a sole supply partnership – while access to electric vehicles is still not on the scale of ICE models - could therefore bring vulnerability to regulatory scrutiny if a policyholder's choice is limited. Instead, partnering with a rental company with a strong national network and comprehensive fleet of EVs could help ease future supply pressures and targets.

Europcar is working closely with insurance providers, repair networks and other key players to help deliver continued customer satisfaction and retention.



James Roberts

Head of Insurance Sales

Europcar Mobility Group UK

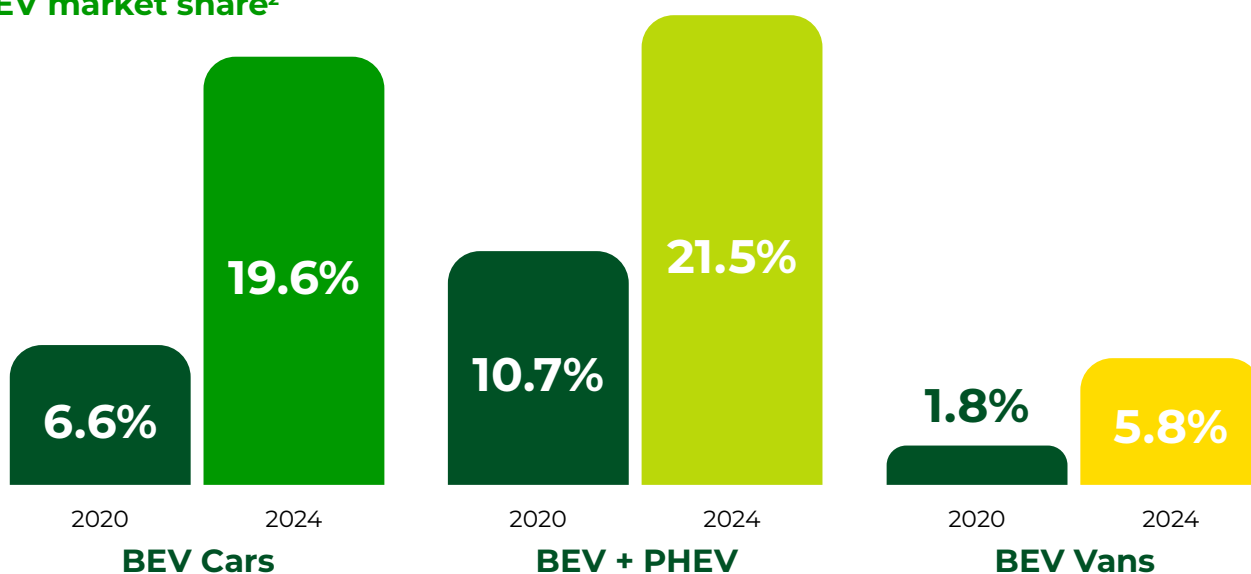


CHAPTER 1 THE BIG PICTURE

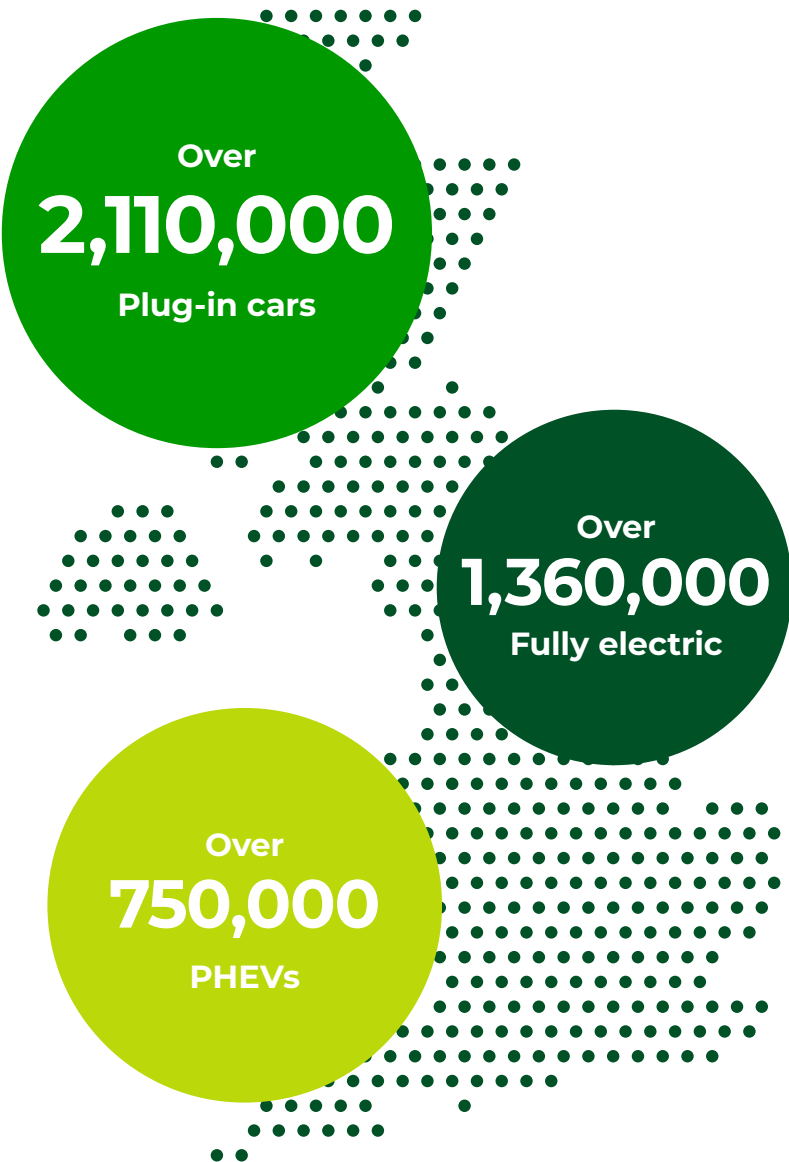
In 2024, the EV landscape continued to evolve. Provision broadened, take-up increased, charging infrastructure expanded and attitudes to going electric steadily improved. There remains a long and winding road ahead, but visible progress has been made.

SMMT data showed an increase in the number of registrations for Battery Electric Vehicles (BEV) and Plug-in Hybrid Electric Vehicles (PHEV) while fewer petrol and diesel vehicles were registered. Significant increases were also seen in the sale of used EVs.

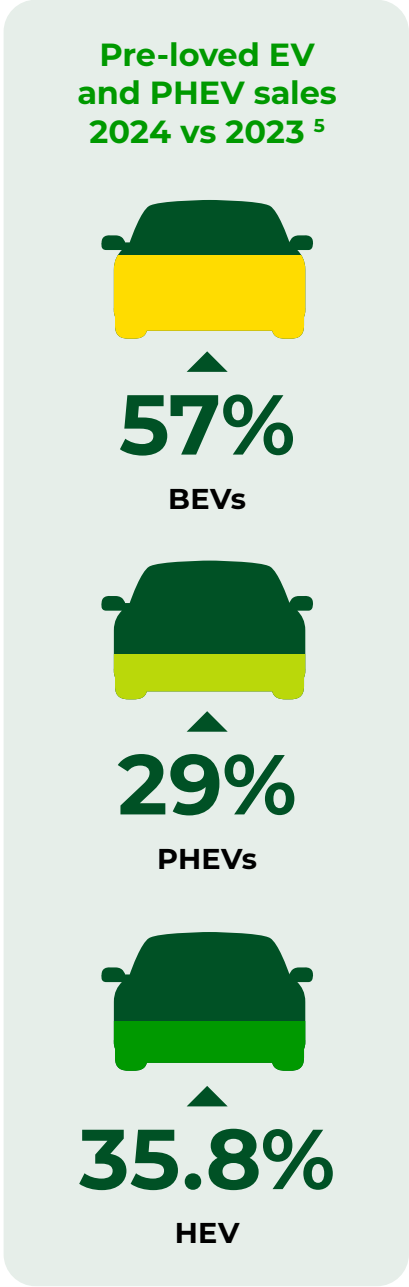
EV market share²



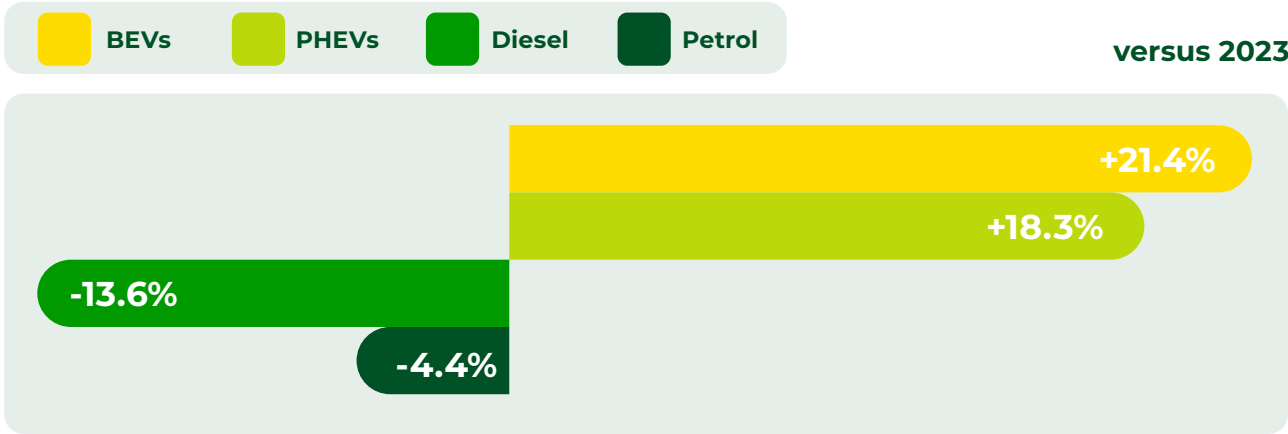
UK car parc 2024 ³



Pre-loved EV and PHEV sales 2024 vs 2023 ⁵



New car registrations in 2024⁴



BUSINESS DRIVERS: THE CHAMPIONS OF EV SALES

As businesses focus on reducing their environmental impact and preparing for the end of ICE vehicle sales in 2030, fleet and business users have accounted for the lion's share of electric sales to date. Fleets represented a market share of 60% of EV sales in 2024. Undoubtedly the benefit-in-kind tax incentives for company car drivers switching to electric have contributed to the growth in EV usage in the fleet and corporate sectors.

Q3 2024 new company car orders⁸



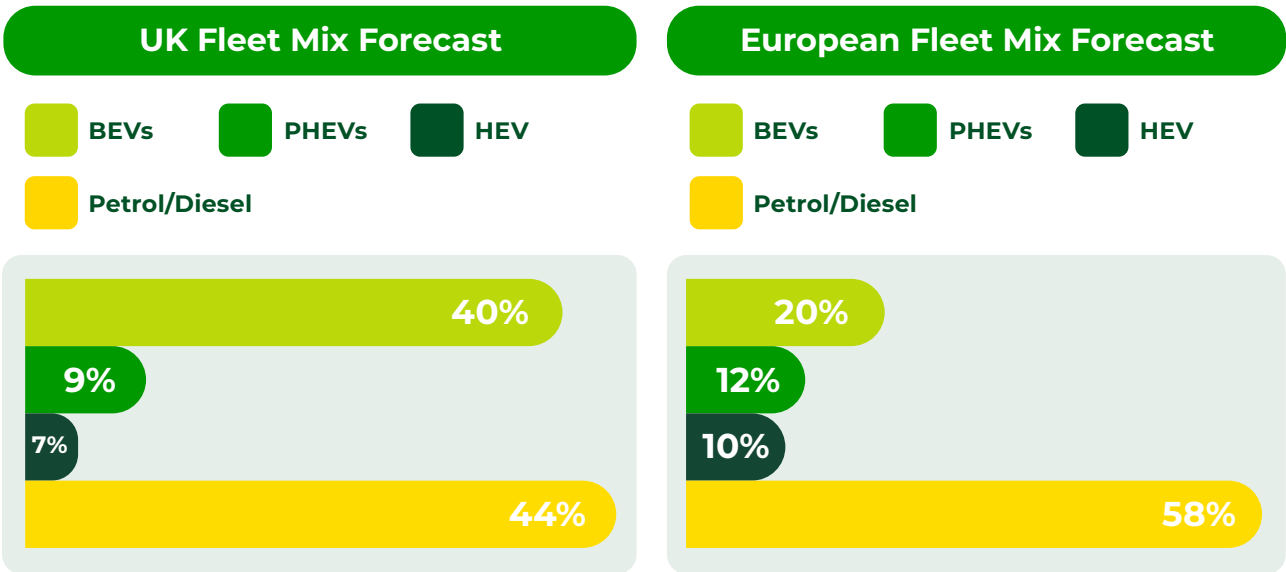
The BVRLA reported that 44% of new company car fleet additions in 2024 through Business Contract Hire (BCH) and Salary Sacrifice in Q3 2024 were electric and 23% petrol. 87% of salary sacrifice company car orders were for BEVs.

UK FLEET MANAGERS SET THE BAR HIGH

2024 research⁹ among fleet managers in the UK and Europe found that UK fleet professionals are setting the bar high when it comes to expected adoption of electric vehicles over the next 3 years.

In 3 years, UK fleet managers expect 40% of companies' fleets to be fully electric whereas only 20% of European fleet managers said the same

Expected Fleet Share Per Energy



PLUGGED IN

Despite the headlines suggesting charging infrastructure remains a barrier to drivers going electric, the latest Zapmap statistics¹⁰ show a 37% increase in charging devices installed in the 12 months to December 2024.

Government grants¹¹ are helping to accelerate the growth of UK charging infrastructure.

As at 1st October 2024:

- The Workplace Charging Scheme (WCS) had funded the installation of 57,162 sockets in workplace car parks since the scheme started in 2016
- The WCS funded 6,819 sockets, in the 12 months ending October 2024 and an additional 813 sockets in schools
- On-Street Residential Chargepoint Scheme (ORCS) had installed 10,064 public charging devices since the scheme's launch in 2017
- Funding had been awarded for 11,300 additional ORCS charging devices

In January 2025, there was further good news of private sector investment. The National Wealth Fund (NWF) and Aviva Investors committed £65 million to expanding public charging networks¹². The investment is part of a broader strategy to ensure the country meets its target of 300,000 public charge points by 2030. This funding is also critical to accelerate the deployment of on-street EV chargers, particularly in urban areas where 55% of residents lack private driveways.





CHAPTER 2

DRIVER AND BUSINESS ATTITUDES

Barriers to switching to EVs

While EV ownership is steadily increasing, several barriers remain firmly in the path of progress. Europcar's monthly EV barometer tracks trends in attitudes towards electric vehicles amongst private drivers and those driving for work, and what is holding them back from making the zero-emissions switch.

Data for the whole of 2024 shows progression in some areas; but little change in others.

For private motorists, there has been improvement in knowledge of electric motoring and the charging infrastructure, but cost still remains a significant barrier. Indeed, the cost of purchasing and maintaining an electric vehicle is a growing concern amongst private motorists.

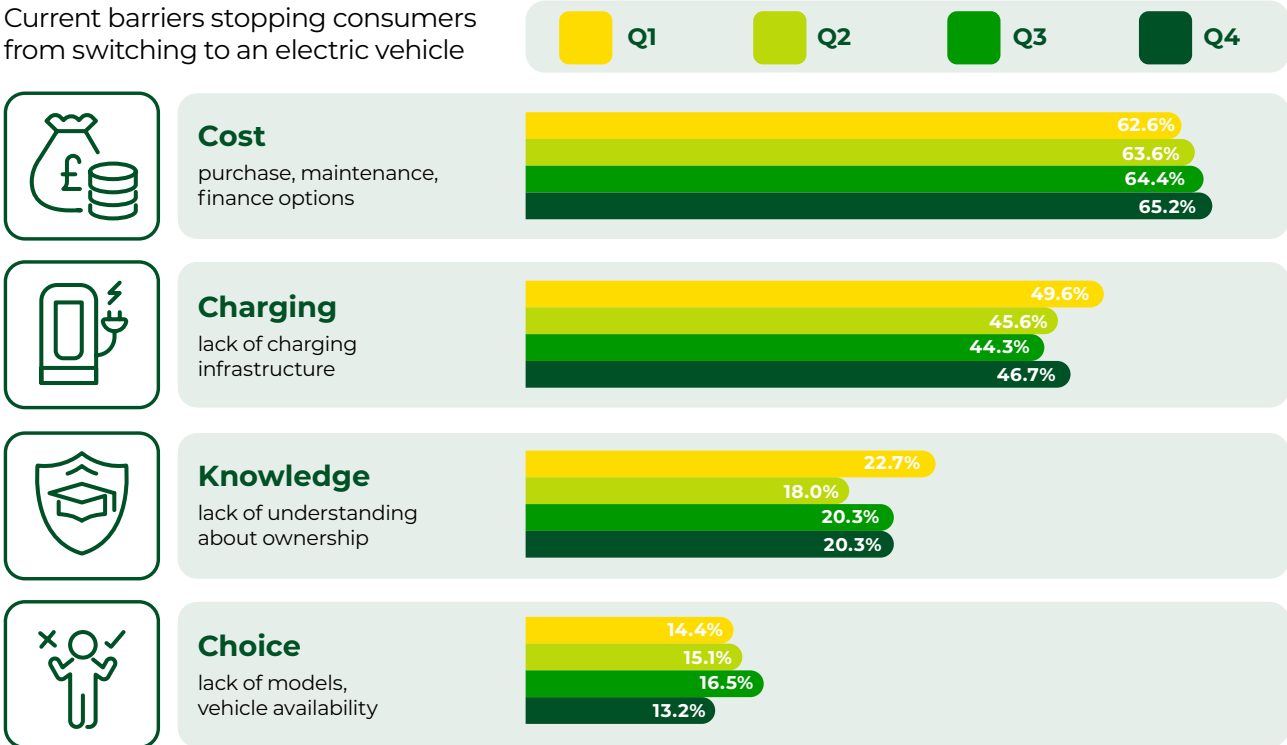
Quarterly averages reveal costs are a barrier for more drivers today than 12 months ago, while charging infrastructure, knowledge about EV ownership, vehicle models and availability have each decreased as concerns in the past 12 months.

Perhaps unsurprisingly, when productivity is a key issue in business mobility, charging is actually the primary barrier for businesses making the switch to electric. Across the year charging has increased as a major concern, rising from 33.8% in Q1 to 37.4% in Q4.

Cost of purchasing and maintaining an EV is a barrier for around 40% of fleets. However, resistance to making the change from employees or employers has grown from 12.1% to 15.2% across the year.

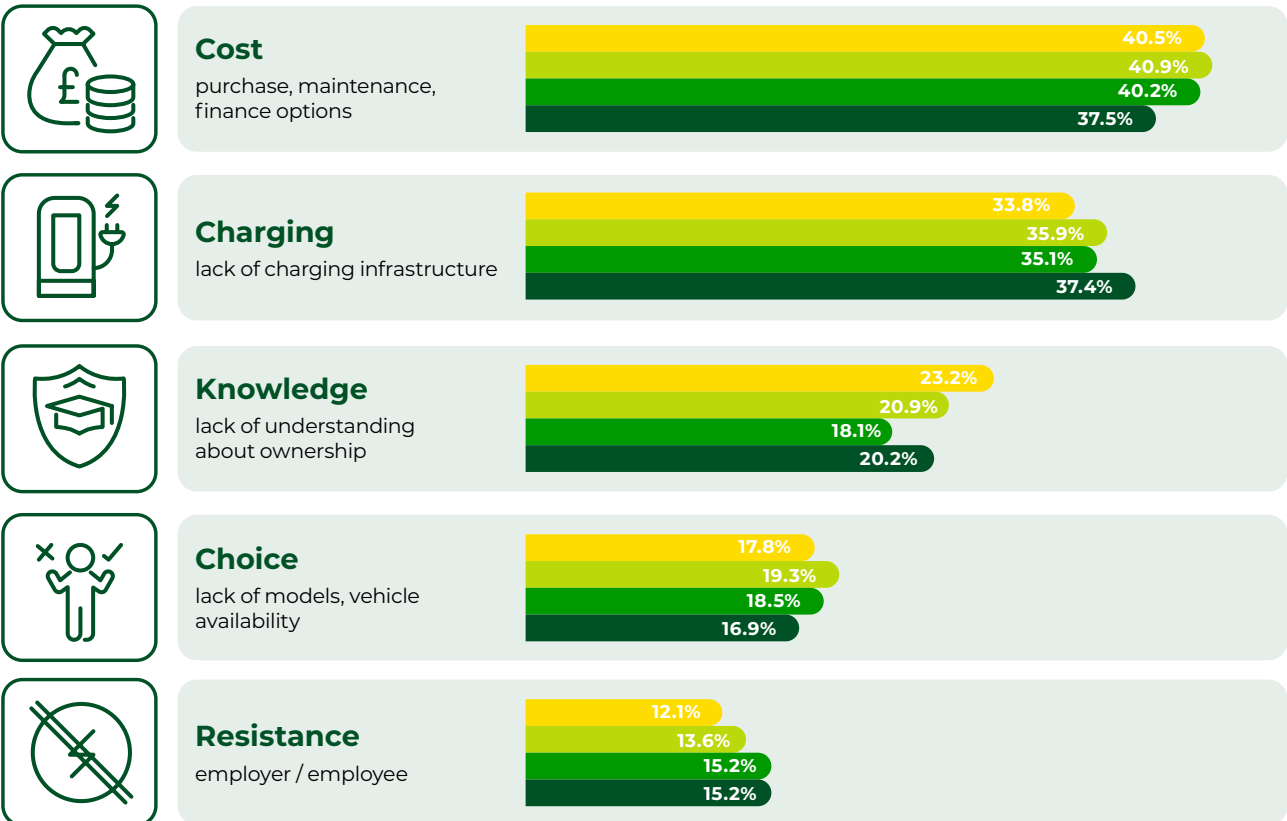
EV Barometer 2024 - consumer attitudes

Current barriers stopping consumers from switching to an electric vehicle



EV Barometer 2024 - attitudes of those driving for work

What do you believe are the barriers for your employer from switching to a sustainable fleet



Charging signage not clear

Lack of clear signage for where drivers can find suitable charging locations may be adding to the charging challenges. In 2024, Europcar commissioned research amongst motorists about the signage for electric vehicle charging – on motorways and A-roads. The findings underlined the lack of consistency which could be adding to range anxiety and charging stress.

92%

of EV drivers and 80% of non-EV drivers agree there should be a universal symbol to indicate EV charging facilities

89%

of EV drivers and 73% of non-EV drivers agree there should be more EV charging signage on A roads and motorways

25%

of EV drivers and 15% of non-EV drivers would rely on spotting signs of EV chargers on a journey

Underlying the importance of this issue, at the start of 2025 the AA released its own research about EV charging signage.

8,268 AA members were asked what would help them make the switch to electric. 75% called for public charger signs to be green to stand out more. The current blue “P” parking symbol is often overlooked, the survey suggests.

Over half (51%) who would consider an EV as their next car, want charging stations to have clear pricing signs similar to petrol stations¹³.

Commercial vehicle challenges

As well as the barriers faced by car drivers, those who drive vans for work are up against additional hurdles, as shown in recent research by Europcar Vans & Trucks¹⁴.

31%

Better battery range to accommodate vehicle payload would help 31%



52%

of van drivers have plans to switch to electric



38%

lower purchase costs would encourage 38% to switch



72%

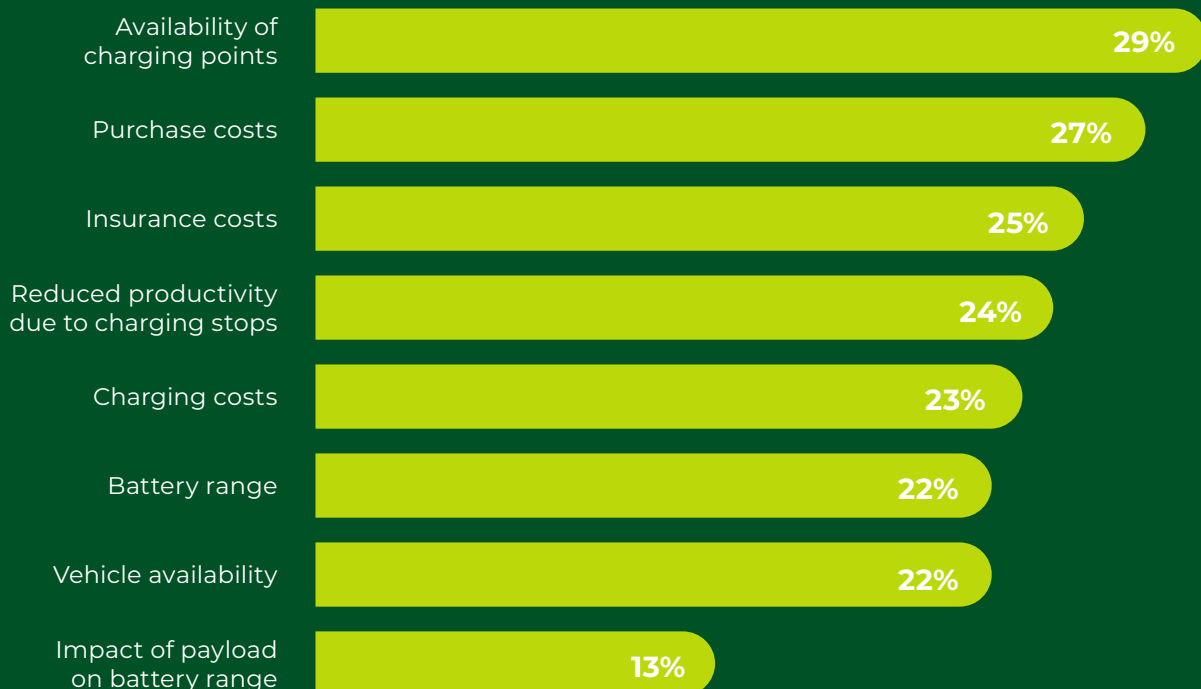
are affected by the growing number of CAZ across the UK



38%

are not confident they understand the CAZ rules

Barriers for van drivers:



The BVRLA's Van Plan¹⁵ campaign is working to tackle these challenges and meet the 2030 70% zero emissions vans target, calling for increased fiscal support, improved charging provision and the removal of certain regulatory barriers.

Barriers cited by the BVRLA include the restrictive size of public charging bays as well as the unpredictability of charger availability and inability to book a charging slot. Available payment methods are also a hindrance. For private charging, the cost and timeframes of charger installation are holding van drivers back from switching.

BVRLA Van Plan Key Asks



Increased Fiscal Support

Grants to make new and used e-vans affordable



Improved Charging

Regulatory and fiscal support for accessible, affordable and fit for purpose chargepoints

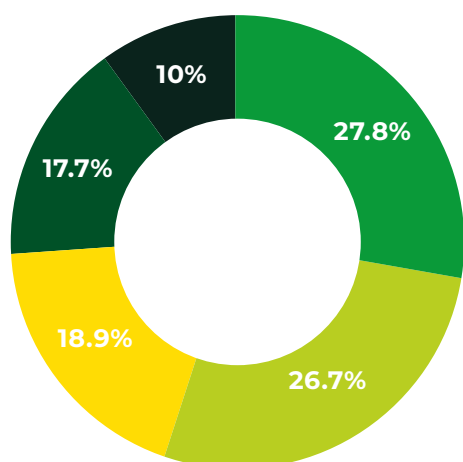


The role of rental in the EV journey

Rental can play a critical role in electric vehicle usage. However, beyond the EV converts there's been limited demand to date.

The BVRLA's Industry Outlook Report¹⁶ confirmed that the rental industry struggles with low demand for electric vehicles.

A Europcar survey found uncertainty around battery range and the potential impact on journeys and productivity due to stopping to charge are the biggest issues for would-be EV-renters.



Why would you not rent an electric vehicle?¹⁷

- Uncertainty about battery range - **27.8%**
- Impact on journey/productivity because of charging - **26.7%**
- Uncertainty about charging facilities - **18.9%**
- Uncertainty about how to find charging facilities - **17.7%**
- Uncertainty about how to charge - **10%**

EV appetite

However, a separate consumer study¹⁸ found that drivers are interested in renting electric cars for holidays and to get a real-world experience.



55%

of drivers have a positive view of EVs



36%

of drivers would appreciate free or discounted charging options



33%

want access to fast charging



25%

would like an EV rental to include an in-car EV navigation system to locate nearby charging stations



41%

of consumers said they would be willing to consider hiring a lesser-known EV brand, if it had received positive reviews



25%

would rent if the lesser-known brand was cheaper than vehicles from more well-known brands

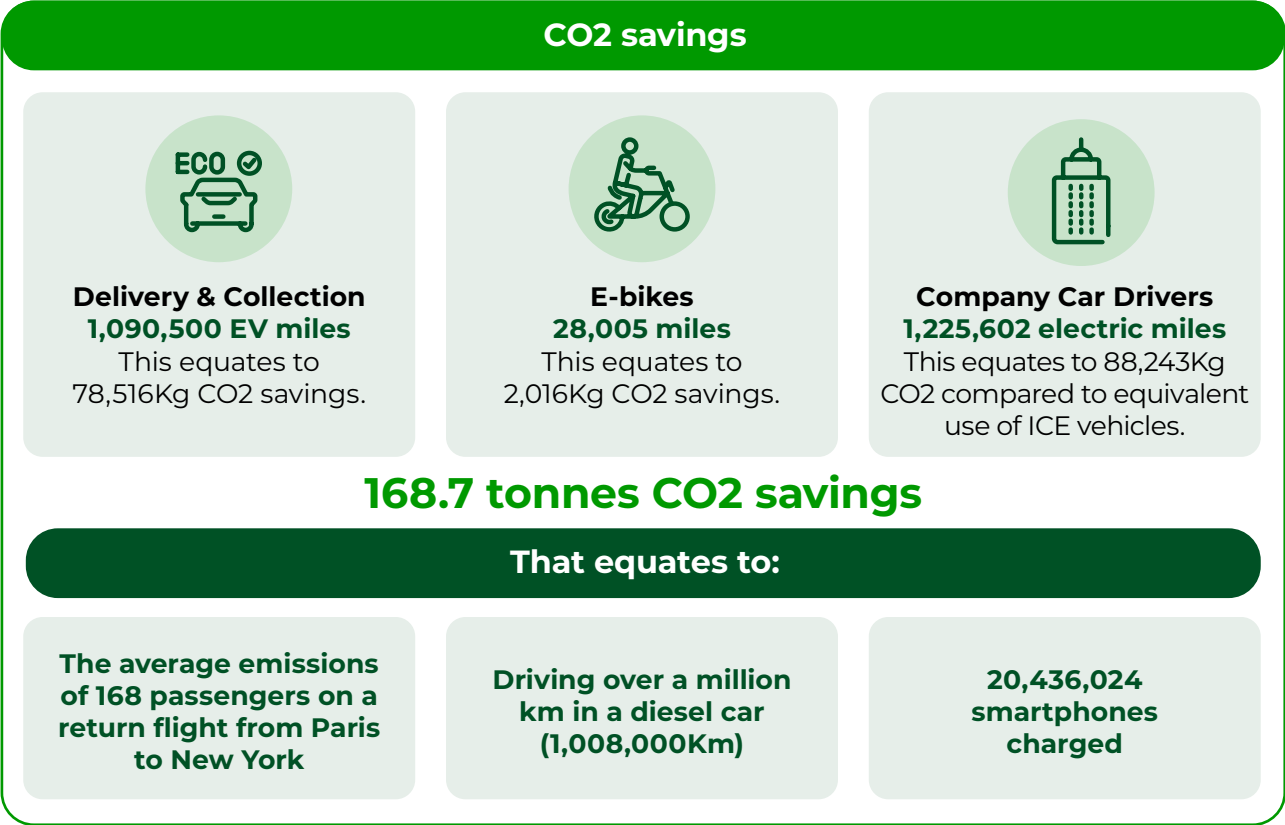
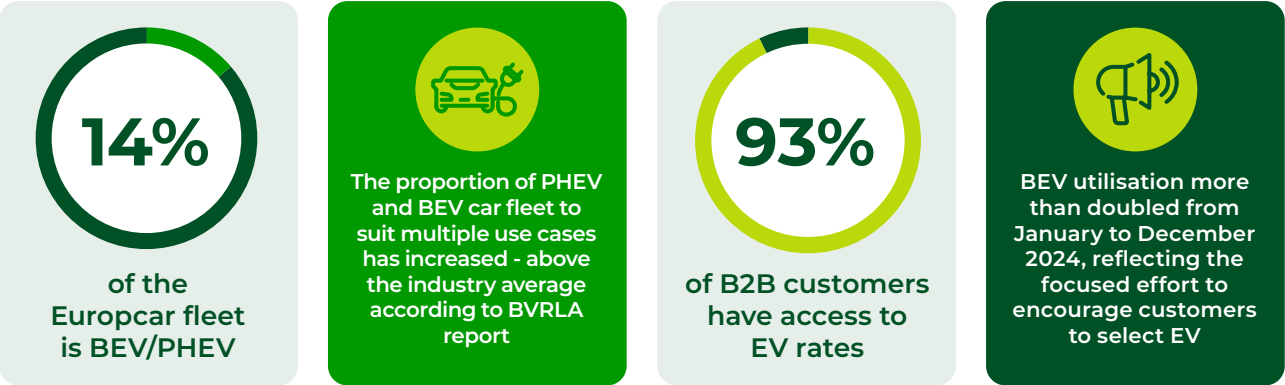


CHAPTER 3

THE EUROPCAR STORY

Europcar is focused on an holistic approach to reducing mobility emissions through vehicle rental. From increasing the proportion of zero tailpipe-emissions vehicles on fleet and using e-bikes to carry out deliveries and collections, to reducing energy and water use at its rental locations and recycling more waste.

EUROPCAR DELIVERING SUSTAINABLE RENTAL



EUROPCAR DELIVERING SUSTAINABLE BUSINESS

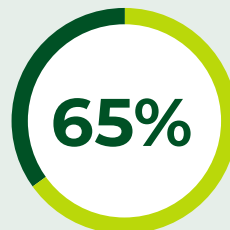


2,172

green parts were bought, saving 198,020Kg CO₂



Electricity usage is closely monitored and reduction targets implemented



of branches have onsite EV charging facilities – national figure is 25% for all rental branches¹⁹



waste was recycled



Car Wash Water Recycling Systems are used in all relevant branches



Pilot programme in place to replace all lights with LED alternatives



Appliances are replaced with energy-efficient models

Carbon Footprint savings for printed materials



12.346

tCO₂e offset



All print provided via FSC accredited paper merchants



100% of Europcar branches can utilise public EV charging



of all tyres fitted were ethically sourced



Woodland Trust certification: Removed a total of 679Kgs CO₂ and supported planting native UK woodland



Using carbon balanced paper has helped the World Land Trust to protect tropical rainforest

TOTAL CO₂ SAVINGS:

168.5 tonnes

Europcar Mobility Group is also committed to reducing its greenhouse gas emissions





Europcar

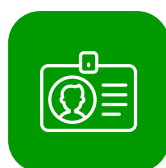
BY THE NUMBERS

Europcar Mobility Group UK has partnered with urban tree-planting charity, Trees for Cities, supporting tree planting projects. Trees for Cities' vision, 'Urban Trees for All, By All,' seeks to harness the power of mass community participation to enable and inspire direct local impact on a national and global scale.



4,480

TREES PLANTED



50 STAFF MEMBERS INVOLVED

ACROSS THE BUSINESS



WE ESTIMATE THAT ONE TREE ABSORBS 1 TONNE OF CO₂ IN IT'S LIFETIME (100 YEARS*)



THE SURVIVAL RATE FOR TREES FOR CITIES TREES IS

95%

HIGHER THAN THE AVERAGE COUNCIL-PLANTED TREES

BASED ON THIS SURVIVAL RATE, OUR TREES WILL ABSORB

4,256 TONNES OF CO₂

IN THEIR LIFETIME

*Dependant on species and location

To read more about Europcar's Insurance solutions visit www.europcar.co.uk/en-gb/p/business/insurance



SOLUTIONS TAILORED FOR THE INSURANCE MARKET

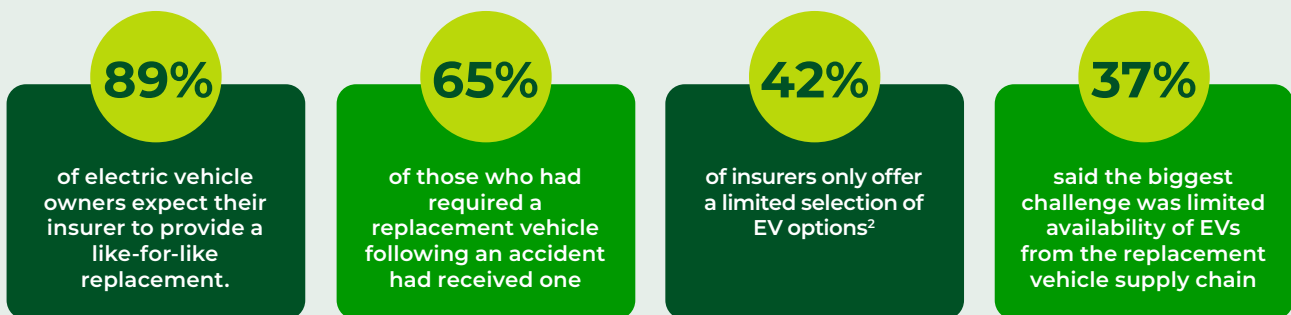
Europcar is on a mission to be the insurance sector's most sustainable vehicle replacement provider. Our strong partnership with manufacturers ensures that our BEV and PHEV fleet has grown significantly. Now a wide choice of electric cars and vans across a range of models and use cases enable us to meet insurers' customer expectations.

Combined with our investment in training, development and infrastructure, we are confident that no other national rental provider serving the insurance sector has made the same scale of commitment to sustainability.



EV driver expectations

Probably the biggest issue for insurers right now is the use of EVs as replacement vehicles. Electric vehicle owners want and expect a like-for-like replacement if their vehicle is off the road¹.



As EV ownership grows, being able to offer 'like-for-like' will become critical for policyholders.

The supplier of choice

Europcar aims to be the supplier of choice for the insurance sector, providing sustainable mobility solutions that enhance the customer experience and support customer acquisition and retention goals.

Tailored products and services support insurance providers, MGAs, brokers and accident management companies. A dedicated insurance contact centre eliminates the need for insurers or policyholders to contact individual branches, and a bespoke invoicing process helps manage fuel and damage reporting to reduce customer queries.

Europcar can act as an extension of the customer claim teams, with dedicated GTA triage handlers to ensure the right vehicle is supplied to the customer based upon the insurer, MGA or broker request. And the Europcar connected fleet provides significant benefits, including efficient management of rental vehicle delivery and collection, for a stress-free customer experience following an incident.

Achieved recognition in a number of industry awards

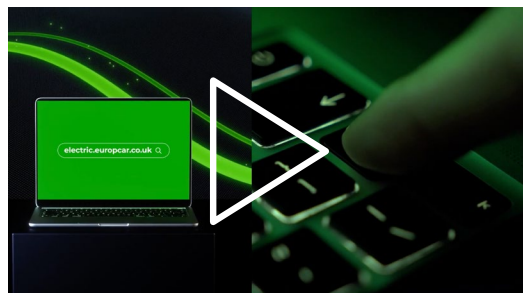
¹Europcar research amongst electric car owners conducted January 2025

²Study of Insurance Professionals by Insurance Post, 2024



DELIVERING THE KNOWLEDGE

In 2024 Europcar launched a unique digital EV guide and Knowledge Hub to educate and inform.



2024 Digital EV Guide Web Performance



28K

Total visits



20.3k

Unique users



82.6K

Interactions on the site

Knowledge hub page ranking

1

Beginners Guide

2

Why rent an EV

3

Charging an EV

Knowledge Hub Top Search Terms

1

Hybrid

2

EV Technology

3

'Call' customer services

4

PHEV



Knowledge Hub User Demographics

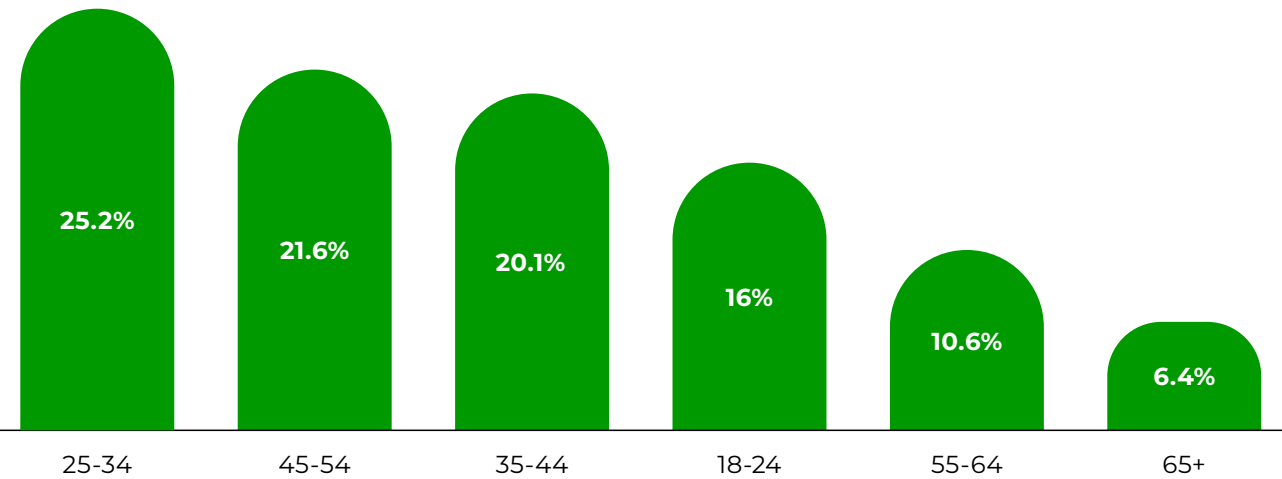
Active Users by City



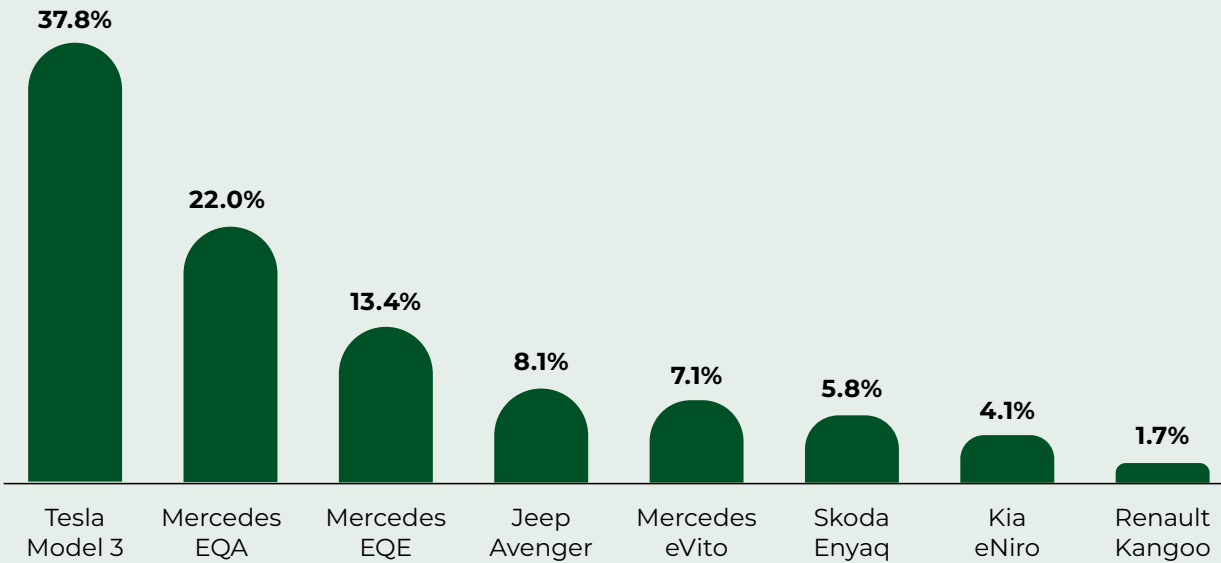
Top Active User Interests



Active Users by Age



EV Showroom Page Ranking



LOOKING AHEAD

Europcar's ambition for 2025 is to continue removing the barriers to electric for private motorists and businesses alike.



eVans Focus

By 2027, 34% of all new vans sold are targeted to be pure EV – are businesses ready for this shift in availability? Helping organisations that use commercial vehicles get on the electric road, Europcar Vans & Trucks has made significant investment in infrastructure, fleet and customer service for eVans.

Providing electric vans to rent for a few days, weeks, months or longer will help businesses overcome some of the hurdles to adoption. Rental also provides a useful stepping stone on the electric van journey. The technology is evolving fast so it makes more sense to rent now, rather than being locked into technology that could be quickly out of date and provides lower battery range.

Rental offers businesses flexibility - no long-term commitment/penalties - and flexibility to select the right vehicle for every job with access to the latest models.

Fleet

Growth of the EV fleet will be focused on giving motorists a wide choice of vehicles to suit every use case, from compact to premium vehicles for long-distance motoring. Bringing the latest models onto the Europcar fleet is also critical to give customers optimum charging and range capabilities. For many customers, there may not even be the need to charge the vehicle at all during the rental.



Infrastructure

Already well ahead of the industry average for electrification of its network, Europcar's focus is now on working in conjunction with airport partners to support these major hubs extend their charging capabilities, ensuring customers' needs are factored in.



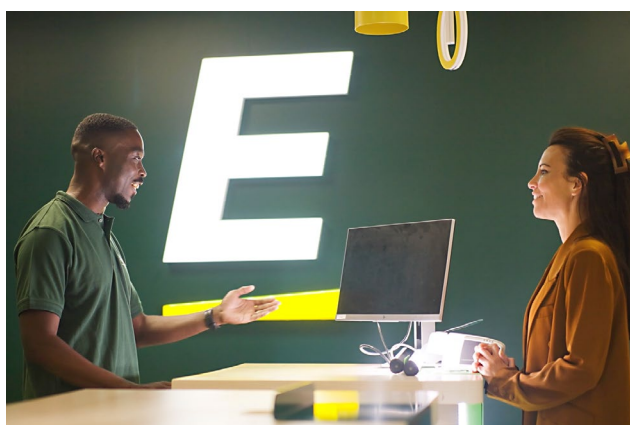


No Need To Recharge

Overcoming customer anxiety about charging an electric vehicle ahead of its return, Europcar's industry-leading policy means EVs are 80% charged at the start of a rental and only require 20% charge on return.

Insurance Sector Focus

Motorists who have made the decision to switch to electric expect to have a like-for-like vehicle if theirs is off the road. With a dedicated support centre, Europcar is committing significant focus to the insurance sector in 2025.



Influencing Policy

Europcar will continue to work in partnership with the BVRLA and other influencer organisations to ensure motorists and businesses are supported on their journey to zero tailpipe emissions. From influencing change to government policy to enable the mobility sector to deliver rental solutions that are accessible and cost-effective, to giving drivers and businesses the confidence to choose electric.

Electric For The Same Price As Petrol Or Diesel²⁰

From 1st April 2025, Europcar is introducing price parity on electric car and van rental rates for business account customers. This will see the rate of electric cars and vans matched to the petrol/diesel equivalent, removing price as a hurdle for renting electric.





CHAPTER 4

EUROPCAR ELECTRIC SERVICES

Europcar is committed to helping fleets reduce their environmental impact and is helping businesses of all sizes to explore electric car and van options. Short- and long-term rental solutions offer a flexible alternative to leasing or buying vehicles.

Business customers benefit from fixed rates, no large upfront costs and no early exit penalties so that they can experience EVs in real-world scenarios. And with comprehensive handovers and free resources to address common questions and misconceptions about EV motoring, businesses and their drivers can start their EV journey with confidence and ease.

A wide and growing range of electric and plug-in hybrid makes and models help businesses experience electric car and van driving in the real world. This is empowering them to switch to a greener fleet.

Helping drivers experience the best in EV technology, the Europcar range of electric cars includes the Tesla Model 3, Mercedes EQ Range, Skoda Enyaq, Kia Niro, Polestar 4 and

Jeep Avenger, all available now for daily or long-term business hire. With exciting new electric cars available soon.

The Europcar electric van fleet is also expanding significantly in 2025. Already the Mercedes eVito, Vauxhall Combo Electric and Renault Kangoo eTech are available to suit different business needs.

To help businesses and drivers gain a better understanding of EV life, Europcar regularly updates its free digital EV Guide and [Knowledge Hub](#). The beginner's guide to EVs answers the most common questions and helps drivers make sense of all the buzzwords and acronyms. It also explains how switching to an EV will help save money and reduce emissions.

Importantly, the guide covers EV incentives available and details how to charge an EV, including explaining the different types of chargers. Europcar customers hiring an EV also gain access to Zapmap through the EV Guide to ensure finding a suitable charger is quick, easy and convenient.

Extending the Learning

Europcar is also focused on supporting and educating EV newbies as they consider the new drive train. In 2024 Europcar participated in the GreenFleet EV Rally which delivered some valuable learnings that have been shared with customers.



Smooth, steady and consistent driving, reading the road and anticipating the conditions ahead are key to getting better performance.



Anticipate any need to slow for traffic or junctions.



Gentler acceleration and letting the regenerative braking do the hard work to get the energy back are also good disciplines.



WLTP is achievable... although it depends on the conditions, so Europcar includes a “real world” range guideline in its EV Guide to support drivers.



Sources

¹ <https://www.fleetnews.co.uk/features/uk-s-leased-fleet-is-the-cleanest-ever-as-ev-transition-accelerates>

² <https://www.smmmt.co.uk/vehicle-data/car-registrations/>

³ Source: <https://www.zap-map.com/ev-stats/ev-market>

⁴ Source: <https://www.smmmt.co.uk/vehicle-data/car-registrations/>

⁵ Source: <https://www.smmmt.co.uk/2024/11/pre-loved-evs-soar-to-record-levels-as-used-car-market-goes-green>

⁶ Source: <https://www.bvrla.co.uk/resource/appetite-for-electric-company-cars-drives-leasing-growth.html>

⁸ Source: BVRLA Leasing Outlook (January 2025) <https://www.bvrla.co.uk/news-insight/leasing-outlook.html>

⁹ Source: Arval Mobility Observatory 2024 (March 2024) <https://www.fleetnews.co.uk/about/arval-mobility-observatory-2024>

¹⁰ Source: <https://www.zap-map.com/ev-stats/how-many-charging-points>

¹¹ Source: <https://www.gov.uk/government/statistics/electric-vehicle-charging-device-grant-scheme-statistics-october-2024/electric-vehicle-charging-device-grant-scheme-statistics-october-2024>

¹² <https://www.nationalwealthfund.org.uk/news/connected-kerb-secures-ps65m-backing-national-wealth-fund-and-aviva-accelerate-uks-ev-public>

¹³ 500 EV drivers and 500 non-EV drivers surveyed by Vypr – EV charging signage survey

¹⁴ 250 van drivers were surveyed using Vypr survey tool between 25th - 27th September 2024

¹⁵ Source: BVRLA Van Plan <https://www.bvrla.co.uk/industry-campaigns/decarbonisation/van-plan.html>

¹⁶ Source: BVRLA Industry Outlook Report (December 2024) <https://www.bvrla.co.uk/news-insight/industry-outlook-an-expert-view/industry-outlook-report.html>

¹⁷ 500 EV drivers and 500 non-EV drivers surveyed by Vypr - EV charging signage survey

¹⁸ Vypr research amongst 75,000 consumers to understand consumer behaviour

¹⁹ Source: BVRLA Vehicle Rental Credentials report. 17 rental operators surveyed

²⁰ Conditions apply, information correct at time of issue, price parity available on Europcar's standard business rates, please speak to our sales team or your account manager if you have any questions



THE EV PARTNER OF CHOICE

There is no question, the journey to reducing tailpipe emissions from motoring presents challenges for many businesses. However, Europcar has already committed significantly to change in our own operations, services and fleet. Our goal is to be the electric mobility partner of choice because we know it's the right thing to do.

We are, therefore, ready to help individuals and businesses on your transition journey. We can help you answer your questions, test and learn in the real world, and make the switch without the burden of long term commitments.

Talk to us now to find out more about how we can help you move to electric.



**Talk to us now to find out more
about how we can help you
move to electric.**

Click here to request a call from
a Europcar sustainability specialist.