

September 2025

EV Transition Tracker



The data behind this report

This second edition of the EV Transition Tracker ('the Tracker') draws on two survey sources:

UK public survey

For the Tracker, Ipsos UK interviewed representative samples of online UK adults aged 18-75. Data is weighted to match the population's profile. All polls are subject to a wide range of potential sources of error. Polling for Wave 1 was conducted between 17th and 22nd April 2025 and generated a sample of 2,241 individuals. Polling for Wave 2 was conducted between 8th and 12th August 2025 and generated a sample of 2,243 individuals.

Motability Scheme customer survey

Additional supporting data points are drawn from a survey of a random sample of Motability Scheme customers. Ipsos UK interviewed a sample of 1,495 Motability UK customers aged 18+. Fieldwork was conducted between 6th and 17th August 2025. A sample of 20,000 current Motability Scheme customers were invited via email to take part in the survey, which was conducted online. The invitation sample was drawn to ensure the proportions in the sample matched those of the full Motability fleet breakdown in terms of vehicle fuel type, age group, region, urban/rural status, and lease type. The data has been weighted to the Motability fleet breakdown for age, region and vehicle fuel type (Electric/Hybrid/ICE - Internal Combustion Engine).

Full data tables for both waves of the UK public survey and for the Motability Scheme customer survey are available from the Ipsos website.

Foreword

Welcome to the second edition of the EV Transition Tracker

The UK is at a critical point of tension in its transition to electric vehicles (EVs). While momentum is building, nervousness and hesitancy remain high.

For disabled drivers, the stakes are even greater. Independent mobility provided through the Motability Scheme enables access to work, education and social connection, and the UK's shift to EVs must actively protect this. It's no wonder then that, at the moment, only 28% are currently considering an EV for their next vehicle.

An accessible EV market won't just support disabled people - it will be essential to achieving the UK's EV sales targets and net zero ambitions. But we're not there yet. Drivers across the UK still face significant challenges.

For some, home charging has unlocked the transition. But for many it isn't yet an option. A reliable, accessible public charging network is essential for those without off-street parking, and expanding access to home charging should also be a priority to ensure no one is left behind.

Cost also remains a frequently cited barrier. While financial incentives like the Electric Car Grant are welcome, people need greater access to practical tools to understand how EV costs compare and whether the switch is affordable for them.

As manufacturers make more EVs, there are over 100,000 disabled people on the Motability Scheme who have made the switch and their experiences offer a valuable lens into what's working and what needs to change.

By learning from what has worked for our customers, these solutions can be extended across the industry. We truly believe that if we can get the transition right for disabled people using the Scheme, it can work for everybody¹.



Andrew Miller
CEO, Motability
Operations



Nigel Fletcher
CEO, Motability
Foundation



¹www.mo.co.uk/scheme-impact.pdf

Stuck in neutral?

The state of the UK's EV transition

For over a decade, the UK Government has supported the uptake of electric vehicles (EVs). In 2024, the Zero Emission Vehicle (ZEV) mandate introduced a legal requirement for manufacturers to sell a rising percentage of zero-emission vehicles, placing greater urgency on fleets and drivers to accelerate the switch².

The latest figures suggest this pressure is driving progress, with Battery Electric Vehicles (BEVs) making up 21% of car sales in July, up from 18% the previous year³. In July 2025, the Government also introduced the Electric Car Grant (ECG) to further incentivise EV adoption.

But while sales figures and incentives show momentum, the question remains: how far will it help the UK meet the 2030 target, and will it create a smooth transition that ensures no driver is left behind?

The Motability Scheme EV Transition Tracker

In April, we launched the Tracker, the first edition of a regularly updated series of reports⁴. The first results characterised the UK's attitudes towards EVs as "divided". We observed that EVs felt unfamiliar to most, but that many could be persuaded to adopt if the right levers were pulled.

Of course, there are still barriers to address and we noted how range anxiety appeared to be evolving into a broader anxiety about charging processes. Many felt that improvements were needed across public charging infrastructure, with obstacles further compounded for disabled people due to accessibility issues.

Three months on, what has changed?

While EVs have been the focus of much media and government attention in the last three months, results from the second edition of the Tracker have revealed that the UK public and disabled drivers on the Motability Scheme are still hesitant when it comes to electric vehicles.

- ✱ Similarly to last quarter, around 4 in 10 (42%) feel positively towards EVs, compared to 26% of disabled drivers on the Motability Scheme.
- ✱ Just 45% of the public would consider having one for their next car, compared to 28% for Scheme customers.
- ✱ The ECG has shown initial signs of positive impact, with a quarter (25%) of the public and 16% of Motability Scheme customers feeling that it will make them more likely to consider an EV.

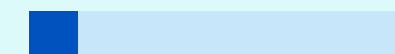
Scheme customers are more exposed to EVs but issues remain

The Motability Scheme supports disabled people in the UK to lease a new vehicle in exchange for their enhanced mobility allowance, with more than 100,000 of our customers already driving an EV. The Scheme works by leasing new vehicles, and as manufacturers are producing more EVs in place of petrol and diesel vehicles, our customers are at the forefront of the UK's switch to EVs. This, together with the support we provide, reflects why uptake among our customers is significantly higher than in the general population.

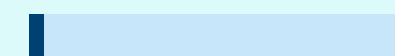
However, this accelerated adoption seems to come hand-in-hand with some trepidation around EVs, and an acknowledgement of what is not yet working for disabled drivers in the transition to electric:

13%

of Motability Scheme



customers use an EV as their main vehicle



in comparison to **4%** of the general public surveyed for this report.



Positivity towards EVs is considerably lower, with **26%** of Motability Scheme customers feeling positive towards EVs in comparison to **42%** of the general public.

Consideration of an EV for the next purchase or lease is also lower among Motability Scheme customers,

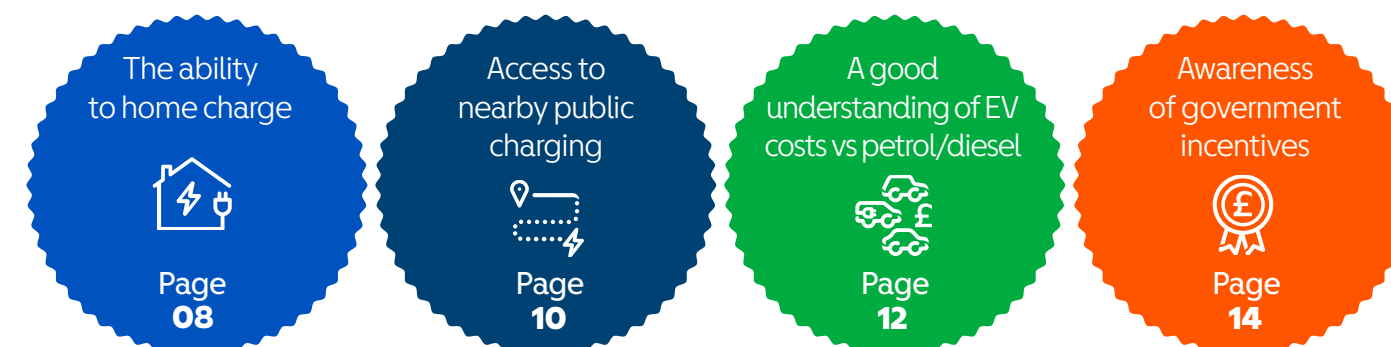


28% would consider an EV for their next vehicle in comparison to **45%** of the general public.

.....
This sentiment is, in part, driven by disabled customers' dissatisfaction with the UK public charging network.

Accelerating the UK's EV transition

While sentiment towards EVs is moving slowly, the deadline to end the sale of new petrol and diesel vehicles is not. It is vital that we understand and address the barriers standing in the way of a smooth EV transition for the UK, and act to ensure that disabled drivers are not left behind. We believe **four major factors** could bring about widespread changes in sentiment across both groups.



²<https://www.motabilityfoundation.org.uk/media/qajolk2r/zev-mandate-consultation-final-formatted-170225.pdf>

³<https://www.smmr.co.uk/vehicle-data/electric-vehicle-registrations/>

⁴<https://www.mo.co.uk/our-impact/ev-transition-tracker>

Women and disabled people more nervous about the move to EV

Across the two waves of the Tracker, we are beginning to see common groups emerge - between both disabled drivers on the Motability Scheme and the UK public. The EV adopters are more likely to be:



Male



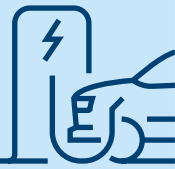


Living in urban areas, with EV drivers even more likely to be living in London





On higher incomes (both in the context of our customers and wider public), and have previous experience charging an electric or plug-in hybrid vehicle





Confident that they will see some reduced costs from EV usage



There is another group that remains in “wait and see” mode, with 43% reluctant to make the switch until others test the waters first, and 44% admitting they are nervous about the shift to EVs — a figure that continues to outweigh excitement (29%).

Those who are nervous are more likely to be women, across both the UK public and Motability Scheme customers. In the public, they are more likely to be living in rural areas, while the nervousness amongst our customers is more geographically spread.



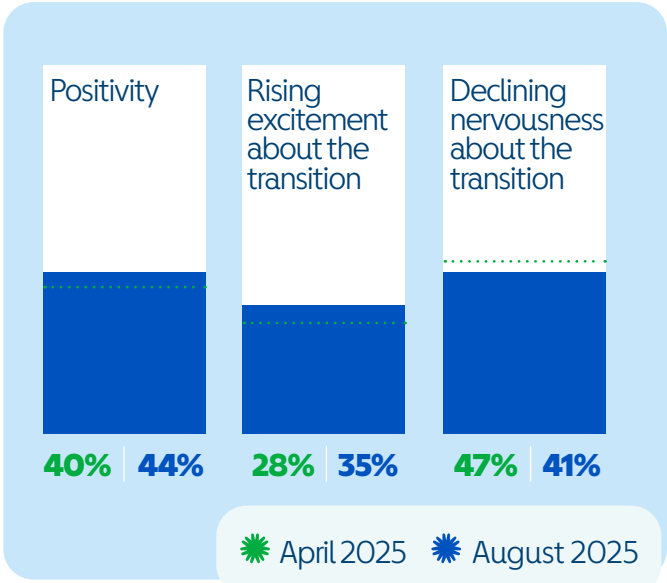
Regional EV divides narrow

Some of the UK’s division in EV sentiment and consideration appears to be dissipating. The first edition of the Tracker revealed a vastly divergent regional landscape of consideration amongst the UK public. In London, almost three-quarters (72%) of drivers who plan to buy a car in the future said they would consider an EV. However, just under a third (31%) in the East Midlands said the same. Three months later the high-low gaps are tightening.

While it is too early to suggest a trend, there are some interesting initial patterns emerging. Although consideration of EVs is down in London (from 72% to 66%), it is up in Scotland, from 40% to 51%. We’ve noted considerable efforts from the Scottish Government and local councils to expand the public charging network, which could be contributing to an increase in public positivity.

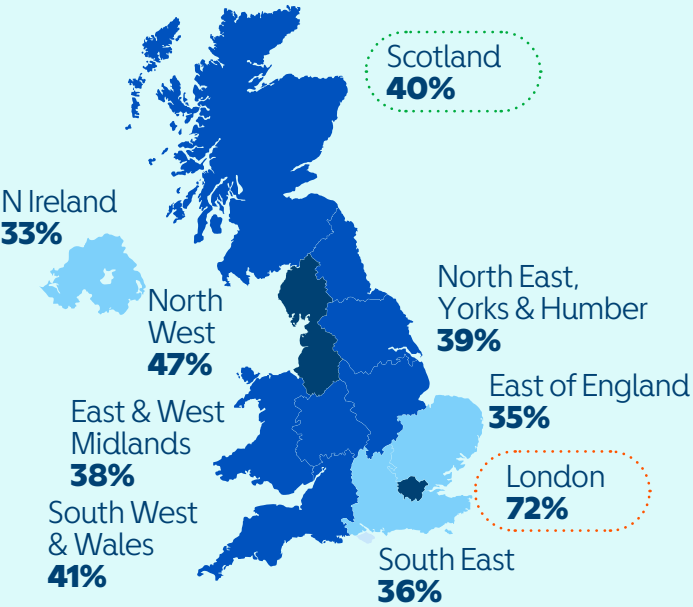
The narrowing in the range of interest between higher consideration and lower consideration

regions is suggestive of a more equal state of affairs across the country. Nonetheless, we will need to revisit this in future editions of the Tracker before we can attest to real and long-term change.

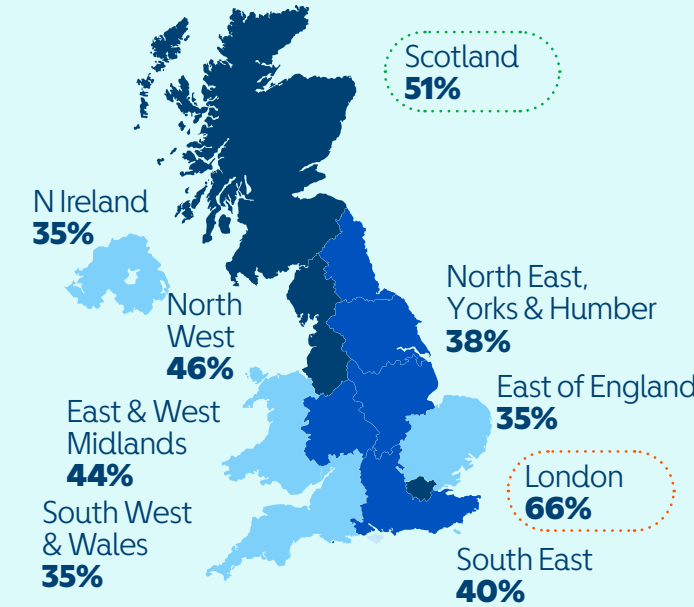


Thinking about the next car or van you will buy or lease (either new or used), to what extent would you or would you not consider buying a fully electric vehicle?
% Definitely/probably would consider

UK Public April 2025



UK Public August 2025



Region where consideration levels have risen since April 2025 Region where consideration levels have fallen since April 2025

Base: UK adults aged 18-75 who will buy a vehicle in the future [Wave 1: 1,601 adults interviewed online 17th -22nd April 2025; Wave 2: 1,567 adults interviewed 6th - 12th August 2025]

Home charging inspires confidence but few have access

In this edition of the Tracker, we conducted a deep dive into the impact that access to home charging has on drivers' perceptions of EVs and their willingness to make the transition.

The exception rather than the rule

Less than a fifth (**17%**) of the public and **15%** of Motability Scheme customers have a dedicated home charger.



Among the general population, **those under 34**, those with higher incomes of **£55,000 or more**, and those living in London are more likely to have a home charger.



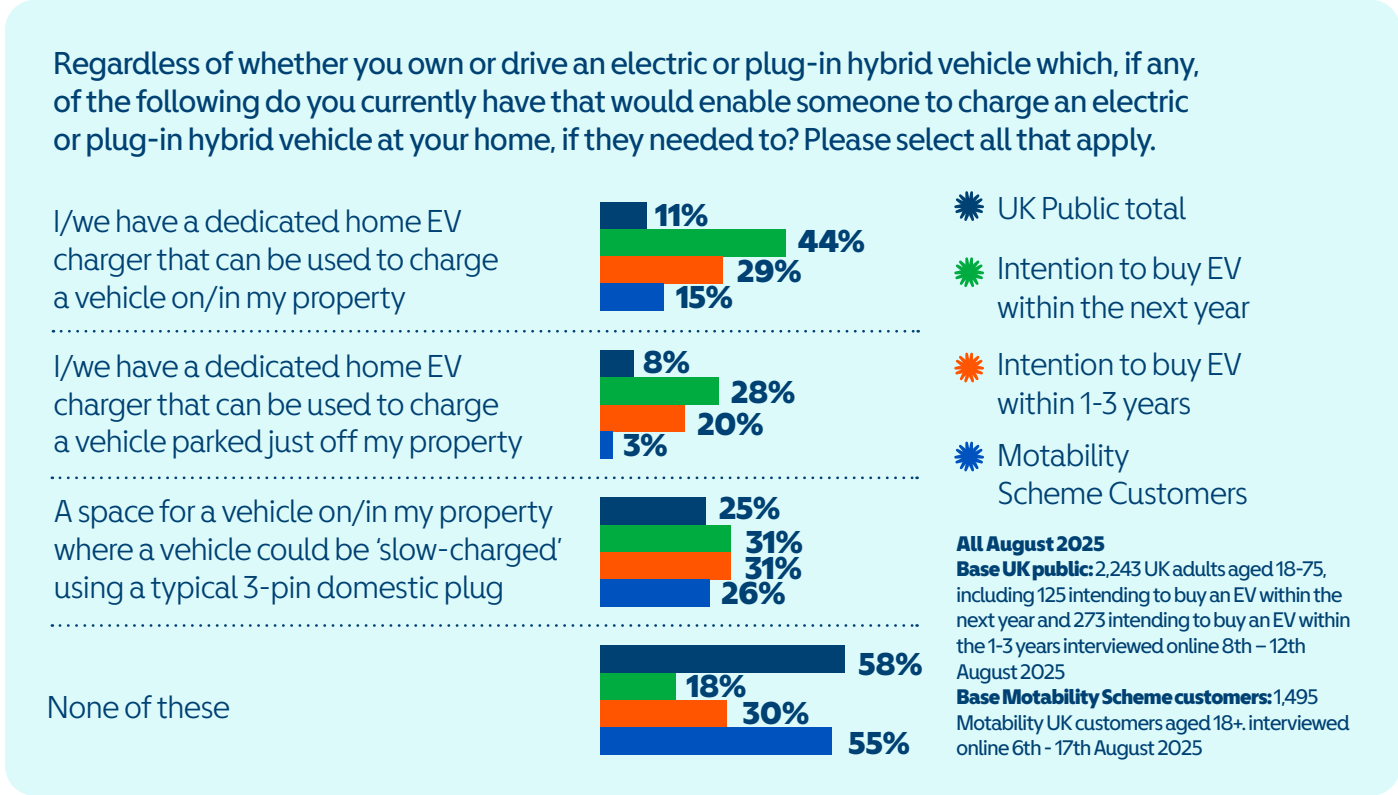
In comparison, the median household income of customers on the Motability Scheme is £18,400. To make the switch easier for disabled drivers, we install a home charger for those choosing an EV for the first time, with access to off-street parking.

An asset that makes a big difference

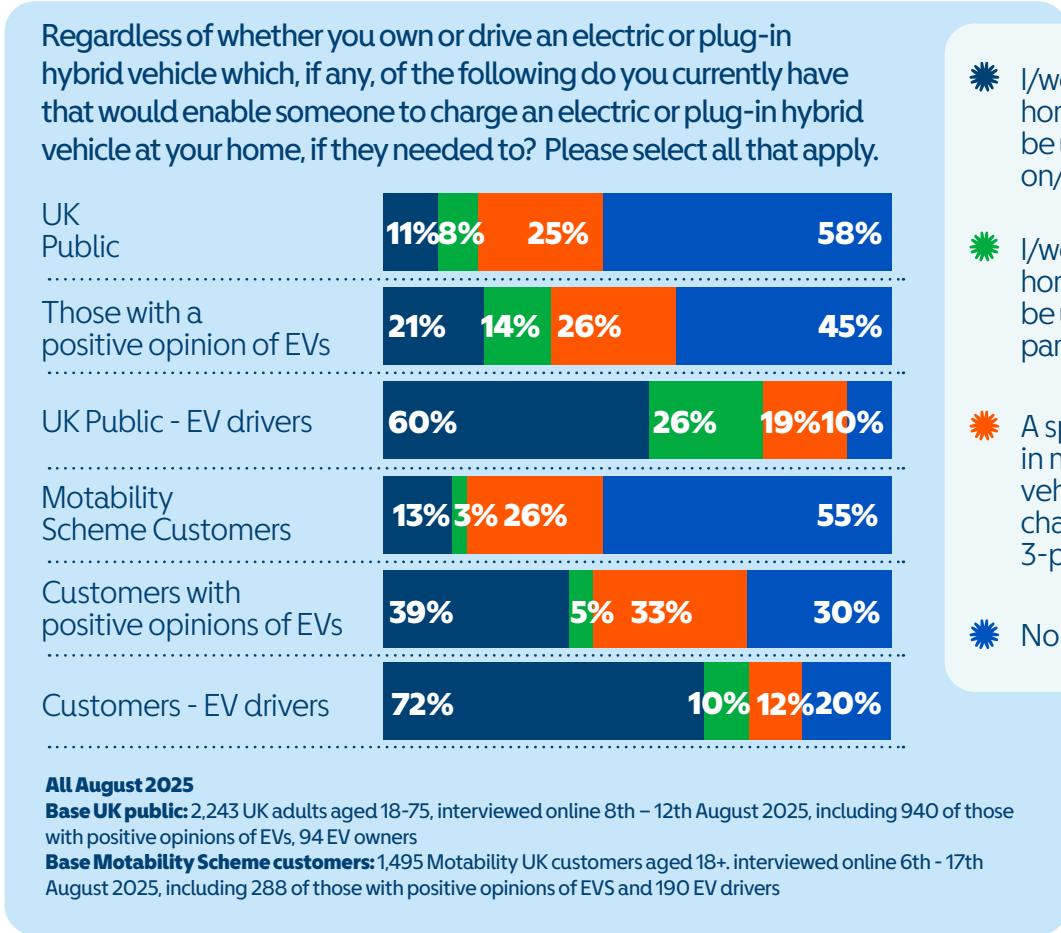
According to the findings, access to a home charger makes a significant difference to both positivity towards and consideration of an EV for next purchase. Amongst those who have a positive opinion of EVs, 32% have a dedicated home charger.

These figures increase amongst disabled drivers on the Scheme (up to 39%), showing how having a home charger plays a huge role in ensuring their vehicle meets their mobility needs.

For those who don't yet have an EV but have a charger included at their property, the purchase of an EV becomes more of a realistic and immediate option. In fact, our data found that among those who expressed the interest in choosing an EV within the next year, 44% had access to a charger.



Private charging is vital for disabled people



For disabled people, home charging isn't a luxury, it's a necessity

Nearly a quarter (23%) of our customers already driving an EV have said they wouldn't use the public network when considering getting back home from a chargepoint. This highlights the significant barriers they face when using the public chargepoints.

With approximately half of Motability Scheme customers, and 30% of people in the UK lacking off-street parking, it will be important to create greater opportunities for private charging, or they risk being cut out of the EV transition⁵.

That's why we are also working to make cross-pavement charging solutions accessible for all drivers. This includes partnering with local authorities across the UK to support cross-pavement charging trials, identifying Motability Scheme customers to take part and funding chargers where cable channels are approved.

"While I see real benefits to driving an electric vehicle, including the driving experience and the money I save from it, I really struggle with charging on the public network. Not only is it difficult to locate chargers that you know will be working and available, as a disabled person you have to consider whether the bays will be big enough, the cables too heavy, or facilities too far away. I find myself doing all I can to avoid charging on the public network"

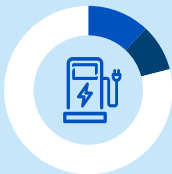
- Vanessa S,
EV driver on the Motability Scheme

⁵<https://www.gov.uk/government/publications/public-electric-vehicle-charging-infrastructure-drivers-without-access-to-off-street-parking>

A public charging network not created equal

The public charging network doesn't inspire confidence

As very few people currently have access to home charging, the availability and reliability of the public charging network play a significant role in EV consideration. Currently, there are definite concerns that there are not enough public chargers. Just 28% agree there are enough in their local area.



Disabled drivers on the Motability Scheme are even more doubtful about how sufficient the public charging network currently is with just **12%** saying there are enough chargepoints in their area.

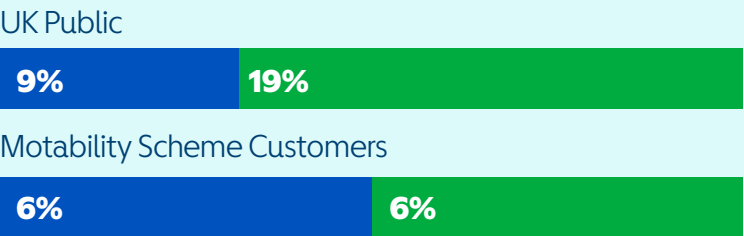
Charging perception is powerful

Half (51%) of the UK public and a quarter (25%) of Scheme customers who say they would consider an EV for their next vehicle believe that there are enough public chargers in their area. Among those who say they won't consider an EV, this figure drops to just 14%, and 7% for Scheme customers.

This shows that a stronger perceived quality of the charging network leads to higher EV consideration, highlighting the importance of improving confidence in the public network, if the EV transition is to succeed.

To what extent do you agree or disagree with the following statements?

There are enough public charging points in the area where I live for people to be able to easily find a charger when they need one



There are enough public charging points in the UK for people to be able to easily find a charger when they need one



- Strongly agree
- Tend to agree

All August 2025
Base UK public: 2,243 UK adults aged 18-75, interviewed online 8th – 12th August 2025
Base Motability Scheme customers: 1,495 Motability UK customers aged 18+, interviewed online 6th - 17th August 2025

"At home", or at least, "near home"

Perceived availability is only one part of the challenge. How far people are willing (or able) to go to reach a charger is equally critical.

When the UK public were asked how willing they would be to walk from their home to a public charger, less than a third (31%) said they would be prepared to walk 10 minutes or longer, and a fifth (20%) said 5 minutes or less.

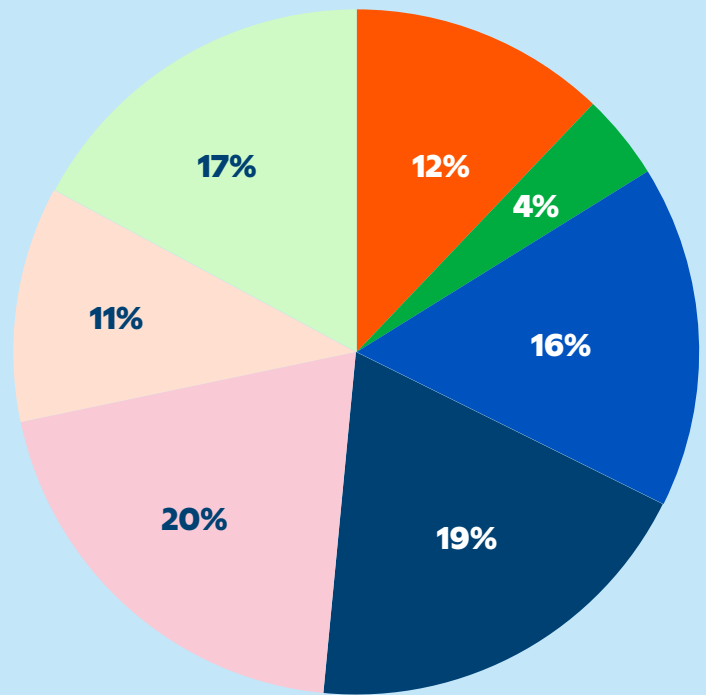
With new data from Field Dynamics - in partnership with Zapmap - revealing that, on average, UK households are 11.94 minutes' walking distance away from a public charger - these gaps in local infrastructure are potentially keeping many from switching to an EV.

If public charging is to become an enabler for a smooth transition, it is important that gaps across the UK network are addressed, and that drivers are provided with greater support for EV journey planning.

To help our customers navigate the charging network, we provide them with an EV Journey Planner⁶. This supports them with planning trips with public chargepoints so that they can be confident in arriving at their destination.

Some people who do not have the ability to charge their electric vehicle at their home use public charging points, located in their local area instead.

What would be the maximum time you would consider walking home once you have located a public charging point? Please consider walking time even if you use other means to return to your home.



- I would not consider using a public charging point
- Less than 1 minute
- Between 1 and up to 5 minutes
- Between 5 and up to 10 minutes
- Between 10 and up to 15 minutes
- Over 15 minutes
- Don't know

Base UK public: 2,243 UK adults aged 18-75, interviewed online 8th – 12th August 2025

⁶<https://www.motability.co.uk/whats-available/electric-cars/charging/route-planner>

Affordability debate divides EV intentions

Another factor greatly impacting the appetite to shift to EVs is personal perception of EV costs.



Among those who say they would not consider an EV for their next vehicle, over half (54%) cite higher upfront costs as their reason, with concerns over cost being more important for women.



Some 29% of the public also cite concern about the running costs being higher as a reason not to consider an EV.

Meanwhile, among those who will consider an EV for their next vehicle, nearly half (45%) cite cheaper running costs as a motivator. This is even stronger for disabled drivers on the Scheme, with 7 in 10 (69%) seeing cheaper running costs as a key motivator.

Beyond these two groups, many admit they lack understanding of EV costs, leaving them undecided in the transition



One in five (19%) of future car buyers in the UK say they are undecided about choosing an EV for their next vehicle. Among these, more than a fifth (21%) are unsure whether a petrol/diesel vehicle or an EV would have higher overall running costs.

Similarly, 14% of our customers are undecided about EVs for their next car, yet a much higher number of those within this group don't know which would incur more expensive running costs (52%).



From sceptic to saver

However, the more experience someone has with an EV, the more likely they are to feel confident that there are many cost benefits that come from driving one.

When asked about a selection of points for comparison between petrol/diesel vs EV, respondents were asked to consider which vehicle was more expensive. For 'whole life costs', 49% of the UK public said EVs cost more than petrol/diesel, while 13% said petrol/diesel cost more than EVs. Subtracting one from the other results in the net score of 36 on the chart to determine the overall result.

Those who use an EV, both in the UK public and among Motability Scheme customers, consider petrol/diesel vehicles to have more expensive running costs. They also strongly feel that EVs are cheaper to fuel/recharge, and Scheme customers are particularly convinced that EVs are cheaper to service/maintain.

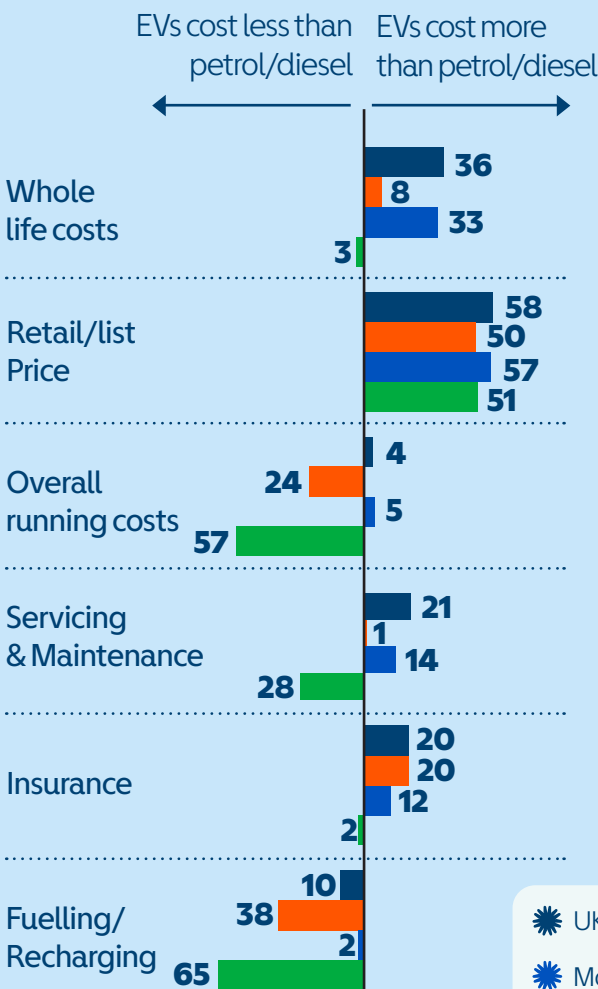
In comparison, those currently with no exposure to EVs (petrol/diesel drivers) feel that EVs cost more on all fronts.

More work is needed

As the sale of new petrol and diesel vehicles ends in 2030, it is important that the potential cost benefits that come with driving an EV are clearly communicated among all drivers⁷.

We are developing tools such as the EV Cost Calculator - which estimates how much an EV could save individual drivers based on their vehicle, charging status, energy tariff and typical usage. Resources such as these will be a vital component in helping drivers to overcome this cost conundrum.

For each of the following, in general, do electric vehicles cost more or less than petrol/diesel vehicles? Net score



"I was initially sceptical of choosing an EV until I understood how it could benefit me. I don't take many long journeys which, as a disabled person, makes charging on the go less of a concern and once I looked into the running costs I realised driving electric would actually save me money. With a home charger and using flexible energy rates, it's costing me less to run an EV than my previous petrol car"

- John S,
EV driver on the Motability Scheme

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⁷<https://www.theaa.com/driving-advice/electric-vehicles/evs-fact-or-fiction#22b>

Financial support spearing momentum

This year, the Government announced the launch of the Electric Car Grant (ECG) to support the transition to zero-emission vehicles⁸. The ECG opened up £650 million of funds for the purchase of EVs priced at or under £37,000. Grants of £1,500 or £3,750 to qualifying individuals will enable more people to access the savings associated with driving electric.

Over half (54%) of those not considering an EV for their next lease/purchase say that it is because they are more expensive. On the face of it, therefore, the Government scheme should be quite a motivator.

An important first step

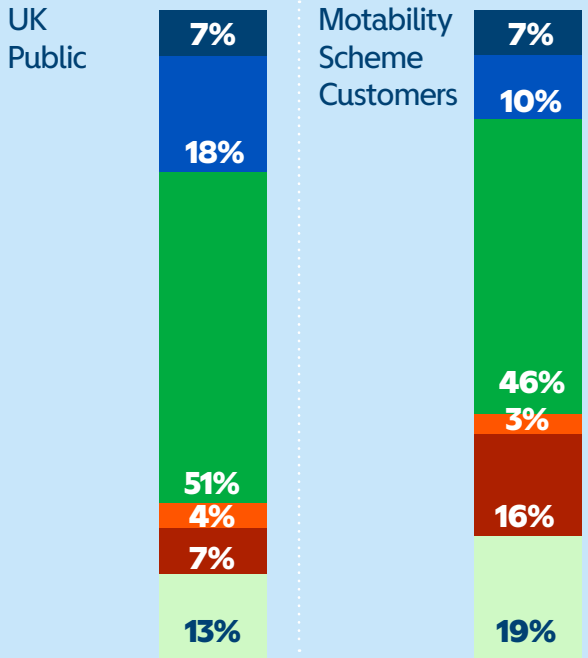
We are already seeing some positive movement from the ECG. A quarter (25%) of the public and 17% of disabled drivers on the Scheme feel that the ECG will make them more likely to consider an EV in future.

The grant is also making women in the UK more likely to consider the switch. A fifth (20%) said they would be more likely to consider an EV based on the grant. And within those women who previously said they were “undecided” about an EV for their next vehicle, a similar number (19%) said the ECG would make them more likely.

Similarly, for women on the Motability Scheme, 15% said they would be more likely to consider an EV due to the ECG.



In July, the Government announced an electric car grant of up to £3,750 when drivers purchase an eligible electric vehicle... Does knowing this information make you more likely or less likely to consider purchasing an electric vehicle in the future, or does it make no difference?



- Don't know
- A little less likely than before
- A lot less likely than before
- Neither more nor less likely than before
- A little more likely than before
- A lot more likely than before

Financial incentives alone won't reach hesitant drivers

While the ECG has made positive strides already, there is work to be done to ensure that all drivers are aware of how it could potentially benefit them.

Our data showed that the levels of people claiming the ECG will impact their next car choice are substantially higher among EV drivers.

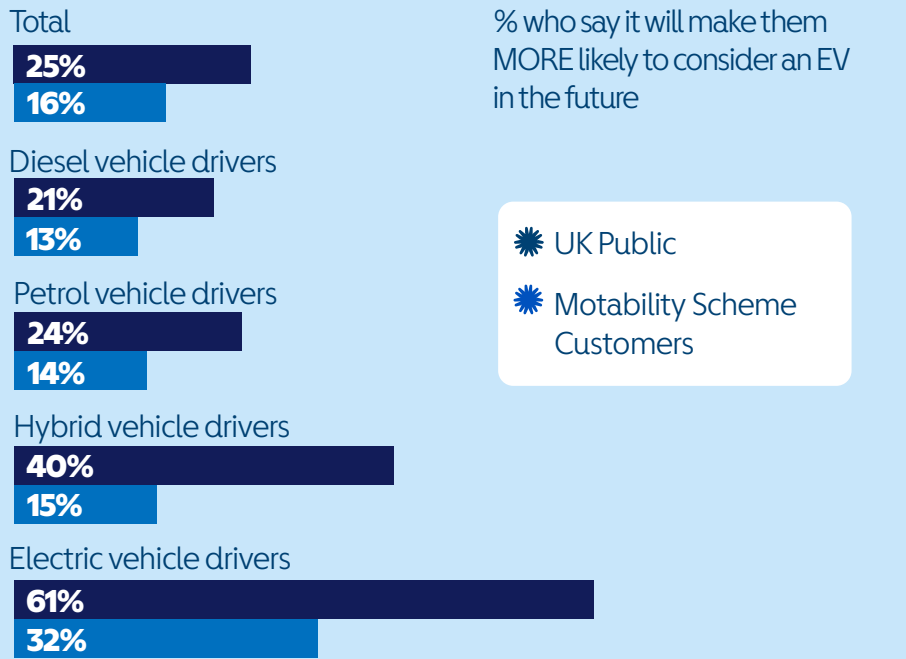
Similarly, the likelihood of saying the ECG would increase their consideration of an EV in future is higher among those who already have a positive opinion of EVs, particularly among younger and more affluent drivers.

Whilst this is expected, it will be crucial for the industry to determine how incentives can be meaningfully communicated to those lower-income groups, targeting beyond those already positive about EVs.

What else can be done to shift the dial on EV uptake and ensure a smooth transition for all drivers in the UK?

- The ECG is a step in the right direction, but we believe financial incentives should be presented with greater exposure and support. That is why we provide our customers with EV test drives and charging demonstrations to help them assess whether an EV could work for them.
- More needs to be done to highlight the evidence that EVs can save drivers money. Tools such as our EV Cost Calculator present easy ways to showcase potential savings.
- Beyond cost, charging infrastructure remains a key concern. That's why the rollout and accessibility of cross-pavement products will be essential for helping more households access home charging. Similarly, providing tools such as our EV Journey Planner, will be essential for helping UK households understand how driving an EV could work around their daily lives.

In July, the Government announced an electric car grant of up to £3,750 when drivers purchase an eligible electric vehicle... Does knowing this information make you more likely or less likely to consider purchasing an electric vehicle in the future, or does it make no difference?



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⁸<https://www.gov.uk/government/speeches/electric-car-grant-launched>

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