Motability Scheme | More in Common

MOTABILITY.CO.UK

January 2026

EV Transition Tracker

Methodology

Quantitative

UK Public survey

A nationally representative sample of 3,085 respondents from across Great Britain and Northern Ireland were interviewed by More in Common for this survey. Respondents were weighted to be representative of the United Kingdom according to gender and age interlocked, region, education level, ethnicity and 2024 General Election vote. Fieldwork for this survey took place between 5 and 10 November 2025.

Fieldwork for post-budget polling took place between 26-27 November with a nationally representative sample of 1,507 respondents from across Great Britain weighted to be representative of Great Britain according to gender and age interlocked, region, education level, ethnicity and 2024 General Election vote. This post-budget polling was run independently by More in Common and not commissioned by Motability.

Polling for the Wave Two and Wave One surveys (for the two Trackers released in 2025) took place between 8-12 August and 17-22 April 2025 respectively.

Unlike Wave Two and Wave One, which were restricted to adults aged between 18 and 75, this Wave Three survey included adults of all ages, including those aged 75 and above.

Conjoint experiment

Part of the survey included a conjoint experiment to produce a robust ranking of the importance of the roles that speed, proximity and cost play for Britons when they are choosing their preferred EV charging point to opt for. Respondents were asked to assume: they owned a fully electric vehicle; they were currently at home and looking to do a regular, full charge rather than a quick top-up charge; that all of the charge points would be free/available to use; and finally they felt equally safe getting to and from and leaving their vehicles at the charge points. Respondents were then asked, on six occasions, to select from a list of three charge points (with randomly varying charging tariffs, charging speeds and of varying distances away from them) which charge point they would opt to charge their vehicle at. This experiment consequently enabled the production of a robust ranking of the importance of these three factors for individuals when they are choosing which charging point to use.

Motability Scheme customers survey

A further survey of a sample of Motability Scheme customers was fielded. More in Common interviewed a sample of 1,144 Motability Scheme customers aged 18+.

Fieldwork was conducted between 10 and 17 November 2025. A sample of 40,000 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 be representative of Motability Scheme customers according to age, region and their vehicle fuel type (Electric/Hybrid/petrol/diesel).

To incentivise as representative a sample of Motability Scheme customers as possible, customers who completed the survey were offered the chance of entering a random draw to win a £50 online shopping voucher. This incentive was not offered to Motability Scheme customers participating in the previous Wave 2 customer survey for which fieldwork took place between 6 and 17 August 2025.

Qualitative

An online focus group of nine participants, all from the South Lancashire region, was moderated by More in Common on 25 November 2025. Participants were recruited to the focus group according to the following criteria:

- Mixture of genders, socioeconomic grades and ages
- One or two individuals with mobility impairments
- All to say they are likely to buy a new vehicle within the next five years
- Majority to be at least willing to consider buying an EV as their next vehicle
- All to live in rural/village/small town areas
- Majority to not be existing EV owners

Foreword

As the UK moves towards phasing out new petrol and diesel vehicles by 2030, understanding what will help drivers feel confident about switching to an electric vehicle (EV) has never been more pressing. While this edition of our EV Transition Tracker has shown that strict opposition to EV consideration is beginning to soften among UK drivers, progress remains uneven, and uptake is not yet happening at the pace required to meet the Government's ambitions.

In this wave of the EV Transition Tracker, we examine the factors shaping driver confidence, from concerns about cost and access to both home and public charging, to perceptions of EV performance in colder weather. Together, these insights highlight the scale of the challenge that must be overcome to deliver a transition that works for all drivers.

Without charging that is reliable, affordable and easy to use, many drivers will continue to feel that the transition has not been designed with their needs in mind. For disabled drivers, who face additional accessibility considerations, these barriers can be especially limiting.

While our findings continue to reinforce the role that experience plays in shaping attitudes, as the market moves beyond the EV early adopters, it is becoming harder to enable the next cohort of drivers to gain the first-hand experience that builds this confidence.

It is also worth noting that, despite the positive shift in sentiment, research for this edition of the Tracker was conducted ahead of the 2025 Autumn Budget, which introduced new tax measures affecting EV ownership. These changes may further influence public sentiment and purchasing decisions, and the impact will be monitored in future waves of our research.

Despite these challenges, there are still routes forward. By working collectively with industry and policymakers to address the issues highlighted in our research, we can take stronger steps towards supporting those drivers who are starting to consider an EV, and work to keep up the momentum of the transition.

Andrew Miller
CEO Motability Operations

Nigel Fletcher
CEO Motability Foundation

Attitudes hold steady despite a bumpy road ahead

In the lead up to the Autumn Budget in late November 2025, there was considerable reporting on the transition to electric and the potential for new taxes on EV users. Despite this, there has been little shift in Britons' headline attitudes towards EVs in November 2025 compared to the previous quarter.

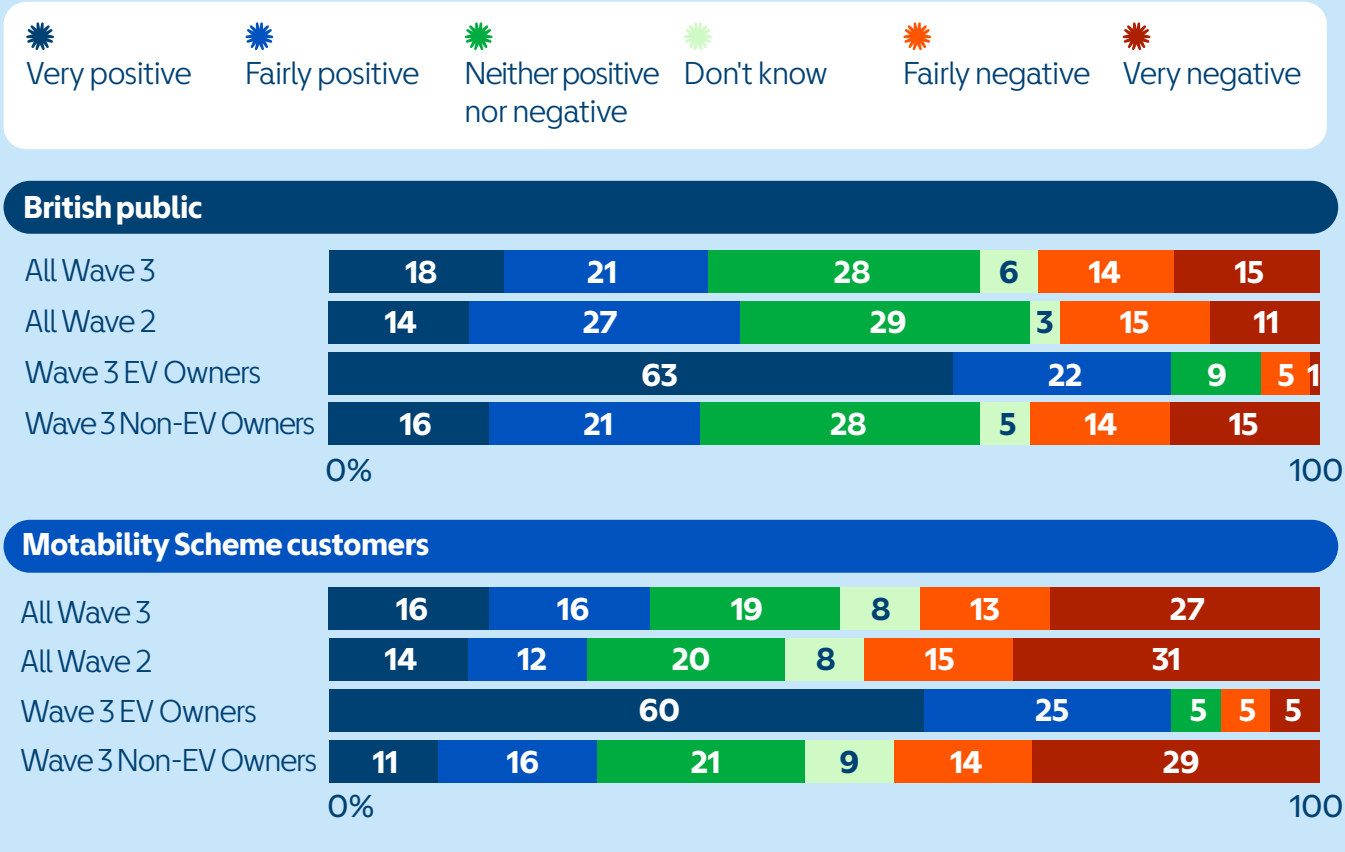
Among Britons as a whole, positivity towards EVs has marginally fallen from 41 per cent in August to 39 per cent in November. The gulf in perceptions between those who own EVs and those who do not remains vast - as 85 per cent of EV owners view the technology as positive compared to just 37 per cent of non-EV owners.

Similarly to last quarter, sentiment towards EVs remains notably more negative among disabled drivers on the Motability Scheme. Thirty-two per cent hold positive views and 40 per cent hold negative views towards EVs, though this negative eight per cent gap between positive and negative sentiment represents a closing of the gap which was negative 20 per cent in previous research in August.

There is an even stronger divide between EV owners and non-EV owners among Motability Scheme customers - 85 per cent of the former hold a positive view towards EVs compared to just 27 per cent of the latter. This positivity among those with direct experience suggests that once drivers make the switch, many of their concerns are reduced – an encouraging sign for the transition.

There has been little change in headline views towards EVs – EV owners remain far more positive than non-EV owners

To what extent, if at all, would you say you have a positive or negative opinion overall of fully electric vehicles (ie not a hybrid)?



Base: All adults.

Pre-budget, opposition was softening

Britons' likelihood to purchase an EV as their next vehicle remained the same, from 44 per cent in both April and August 2025 to 45 per cent now among those who say they will buy a vehicle at some point in the future.

However, in mid-November, opposition to buying an EV looked to be softening. The proportion of respondents saying they would not consider buying an EV for their next vehicle fell from 36 per cent in both April and August to 30 per cent, and those who are undecided or don't know have risen from 20 per cent to 26 per cent.

The willingness to choose an EV among Motability Scheme customers who intend to buy or lease a vehicle in the future also slightly increased. A third (32 per cent) said they would be open to buying an EV for their next vehicle compared to 27 per cent of those in August.

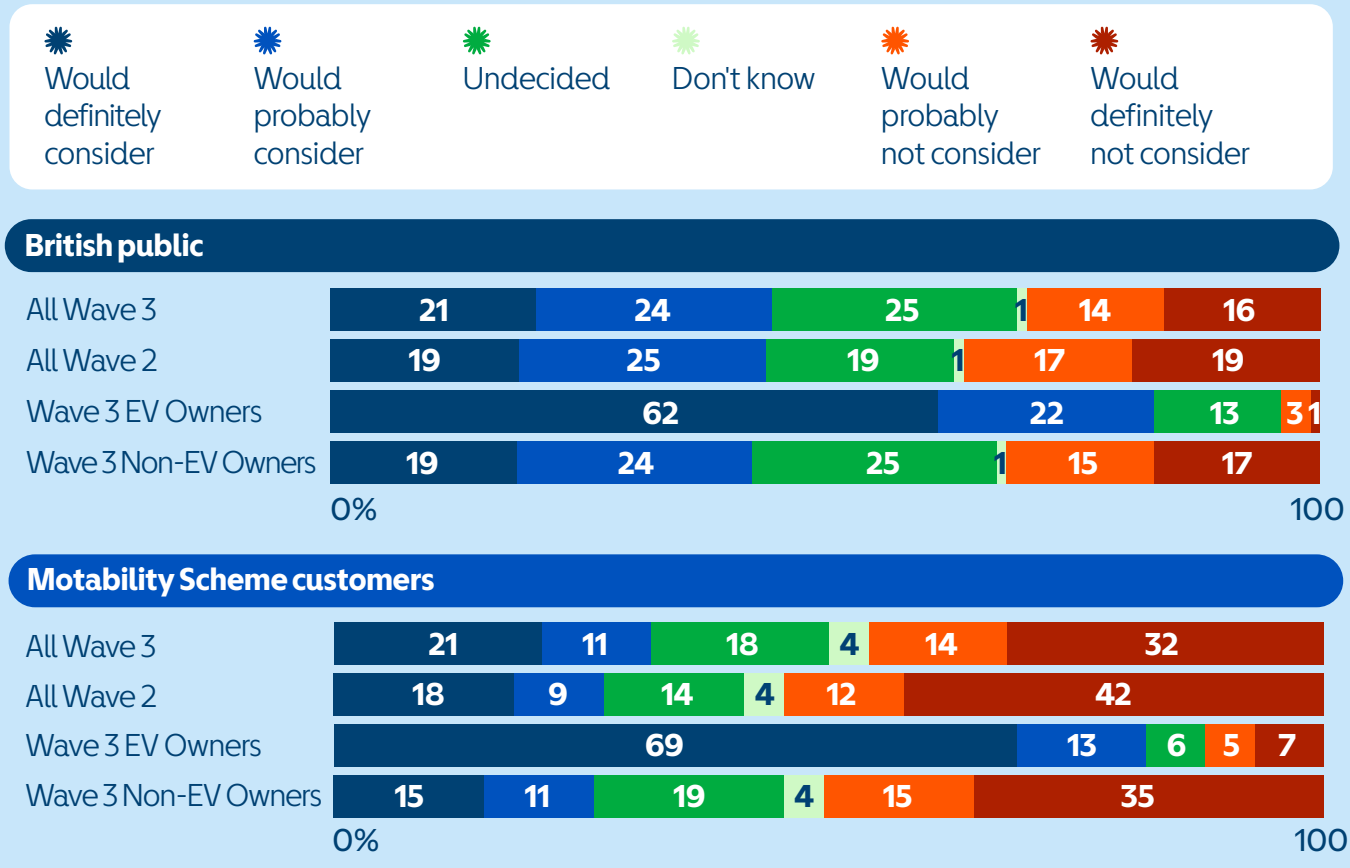
"I'm on the fence really with regards to buying an EV. It's a definite consideration going forward. My brother's got [an EV], so has my brother-in-law and they enjoy it."

Ash, Lawyer, Rossendale

The divide between those who do and do not already own an EV continues to be even starker among Motability Scheme customers. Eighty-two per cent of the former are open to choosing another EV compared to just 26 per cent of the latter, again suggesting that once they experience an EV, many of their concerns are put to rest.

Willingness to consider buying an EV has marginally increased since the last wave

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 (ie not a hybrid)?



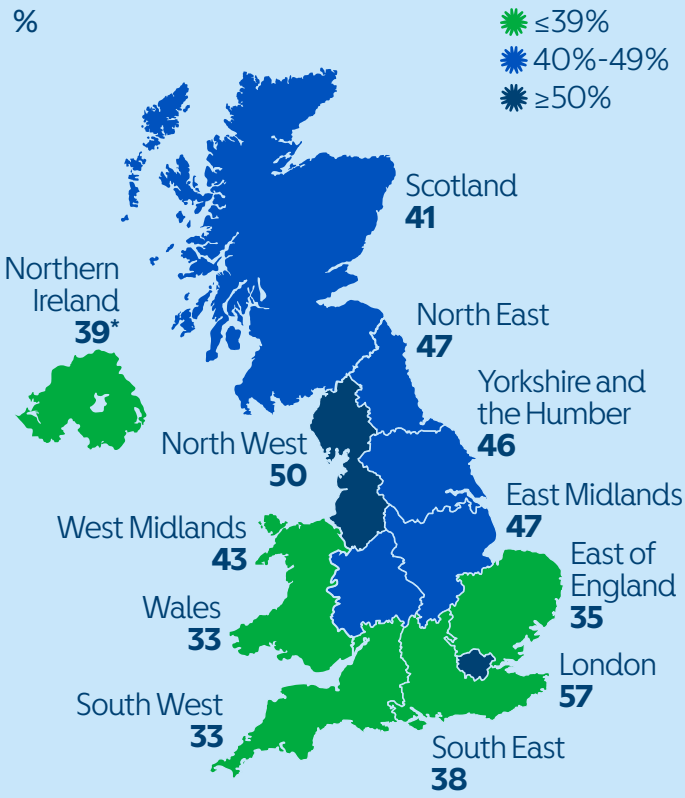
Base: Respondents who have a valid driving license and intend to buy a vehicle in the future.

Regional opinions converge, slowly

Alongside a softening in opposition, regional differences in EV consideration have continued to narrow. An 8 percentage point decrease in the proportion of Londoners, who intend to buy a vehicle in the future, who are willing to consider buying an EV as their next vehicle (now 57 per cent) has meant the gap between the most willing region (London) and the least willing region (South West England at 33 per cent) fell to 24 percentage points, down from 39 percentage points in April 2025 and 31 percentage points in August 2025.

The gap in headline sentiment towards EVs is more pronounced however, as while Londoners have net positive views towards EVs of positive 37 per cent, Britons in the South West of England hold net negative views towards EVs of negative 1 per cent.

Those who would definitely/probably consider buying an EV



Question: 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. **Base:** All adults who intend to purchase a vehicle in the future.
* Northern Ireland sample size is too small to allow for a robust estimate.

Value-for-money concerns costing dear

A continued challenge facing Britain's transition towards EVs is the perceived lack of cost-effectiveness. Across all four metrics tested – upfront price, maintenance costs, charging costs and whole-life costs – non-EV owners overwhelmingly believe that EVs are more expensive than petrol/diesel vehicles.

Just 12 per cent of Britons think that the lifetime cost of owning an EV is less than that of a petrol/diesel vehicle, while almost half (48 per cent) think it is more expensive.

"My wife and I changed to the EV because eventually we would like to get off grid and it suits our lifestyle. We are lucky we have a home charger, it makes the running costs so much cheaper - I pay far less than I did when I was driving a petrol vehicle."

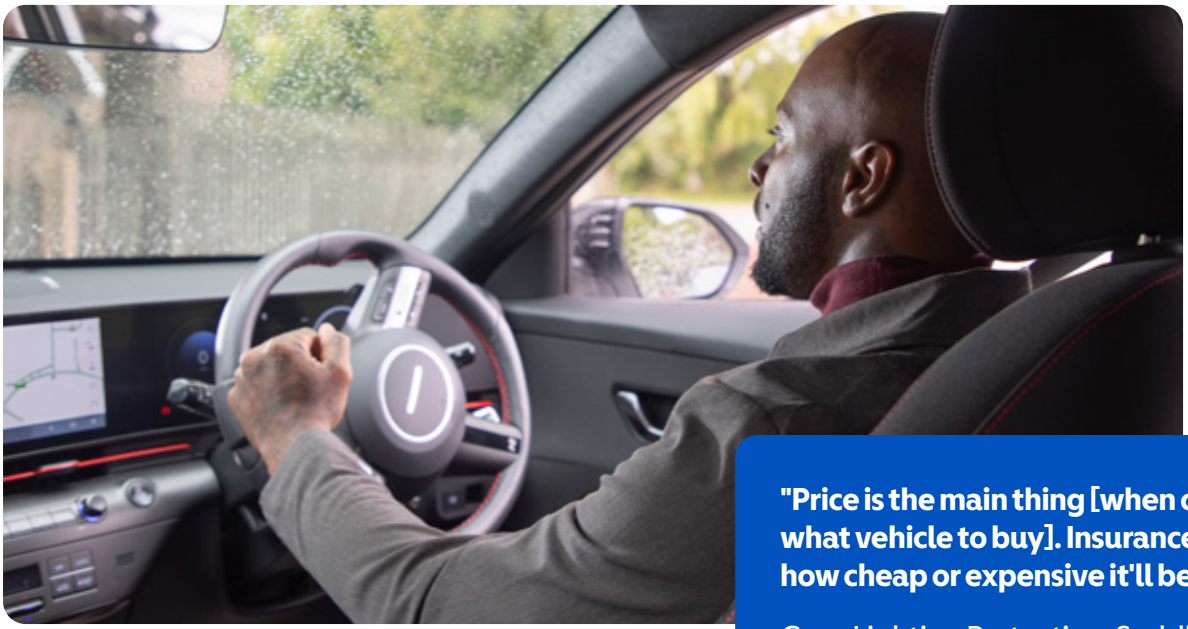
Ronnie, Motability Scheme customer

Most significantly, just 17 per cent of Britons who intend to purchase a vehicle in the future and would consider making this an EV, but don't yet own one, believe EVs have lower lifetime costs than petrol/diesel vehicles. Fifty-four per cent of these Britons think EVs have higher lifetime costs. If this group continue to see EVs as the costlier option, the transition risks slowing at the very point where momentum is needed most.

However, EV users on the Motability Scheme overwhelmingly see their vehicles as being more affordable to charge/fuel (68 per cent), and as narrowly having lower lifetime costs (37 per cent).

To demonstrate the cost-competitiveness of EVs, we have been developing tools such as our EV Cost Calculator, which which helps our customers understand how the running costs of an EV compare with petrol and diesel vehicles based on their own driving habits, charging arrangements and energy tariffs.

By giving our customers a personalised view of potential savings, resources such as these play an important role in helping to address cost concerns – particularly for those considering an EV for their next vehicle – whose perceptions will be central to maintaining momentum in the UK's switch to electric.



"Price is the main thing [when considering what vehicle to buy]. Insurance, price, and how cheap or expensive it'll be to run."

Gary, Lighting Protection, Saddleworth

Turbo-charging the transition means addressing cost concerns

Regardless of the vehicle they intend to buy or lease, Britons see cost as the most important factor. Thirty-three per cent of the UK public and 30 per cent of disabled drivers on the Motability Scheme agree that upfront cost of a new vehicle is one of the most important factors when choosing a new vehicle. While the upfront cost alone is the top factor for Britons as a whole, for Motability Scheme customers the internal size of the vehicle is their top consideration – given their mobility requirements. Nevertheless, when the proportion of Motability Scheme customers selecting either the upfront or lifetime costs is taken together (45 per cent), the overall cost of the vehicle is the most important factor for them as well.

"It's not all about the now, it's what's going to happen in the future. If you invest 50 grand in a motor, you've got to weigh up all the pros and cons and what the Government's going to do. Are they going to move the goalposts again [for EVs] like they did with diesel? They're saying you're going to be charged for mileage now."

Mark, Plumber, Urmston

However, in the 2025 Autumn Budget, the Government outlined proposals for a new pay-per-mile tax on EVs, which may further impact Britons' cost perception and willingness to switch to an EV.

Initial post-Budget polling found that almost half of Britons (46 per cent) said the proposed 3p per mile tax on EVs would make them less likely to buy an EV.

Most significantly for the transition, among those who say they are probably considering an EV as their next vehicle purchase, half (50 per cent) said it makes them less likely to buy one, suggesting it may make many who are thinking of switching to an EV, pause for thought.

This comes alongside wider policy changes intended to make EVs more affordable, such as extending the Electric Car Grant. Taken together, these policy changes could feel like mixed messages to UK drivers, making it harder for people to judge whether an EV is a financially sound choice.

If the new tax is to avoid slowing progress, it will be more important than ever that the financial benefits of driving electric are clearly communicated. Without this, many drivers may continue to see EVs as unaffordable.

Charging costs are the only cost advantage EV owners believe their vehicles have

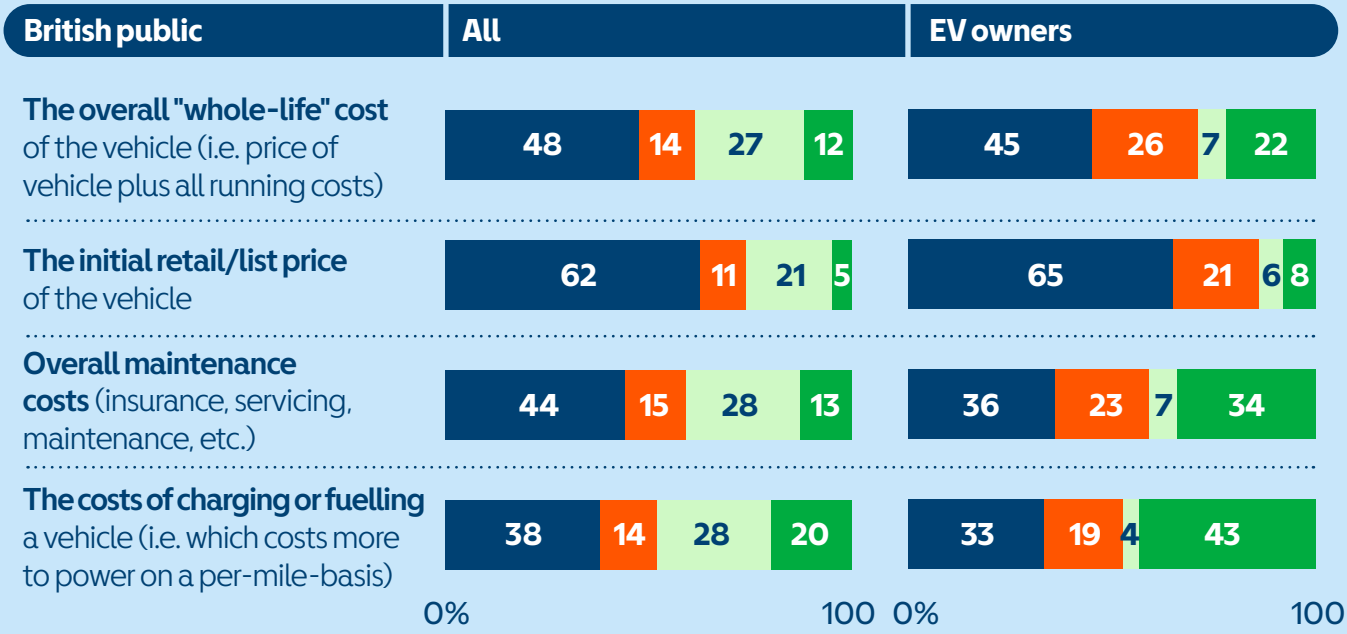
For each of the following, in general, do fully electric vehicles cost more or less than petrol/diesel vehicles (sometimes referred to as ICE vehicles – Internal Combustion Engine), or do you think they cost about the same?

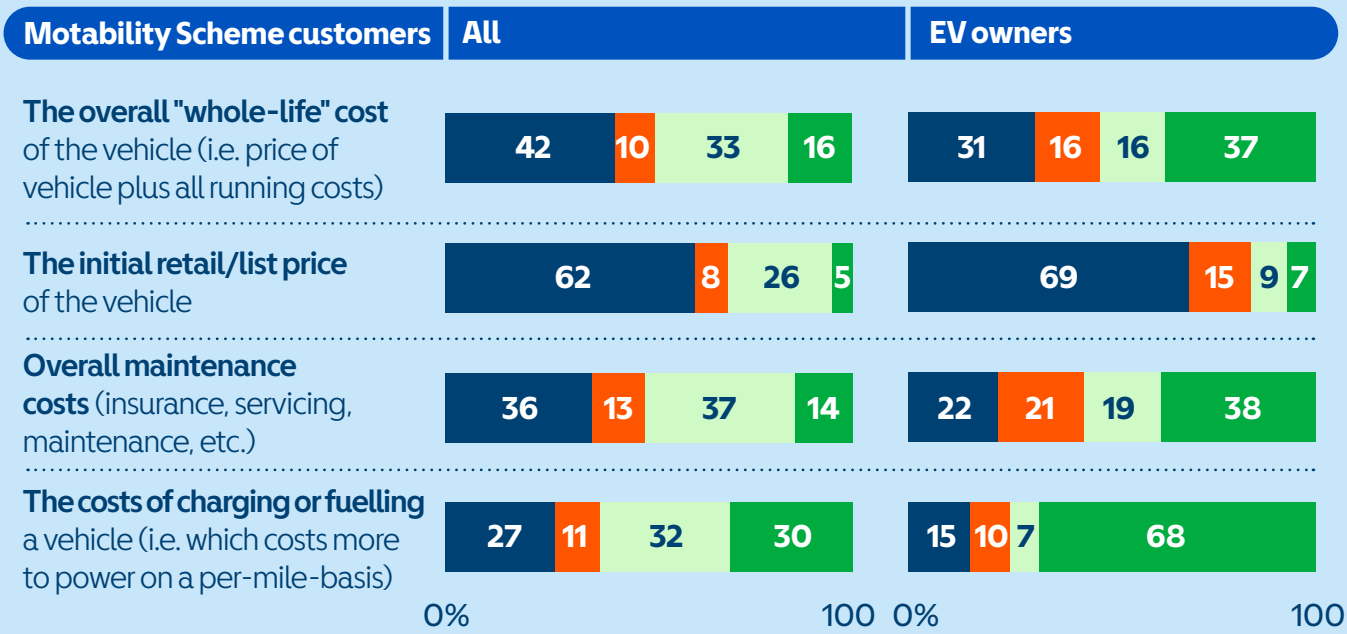
EVs cost a lot/little more than petrol/diesel vehicles

EVs cost about the same as petrol/diesel vehicles

Don't know

EVs cost a little/lot less than petrol/diesel vehicles





Base: All adults.

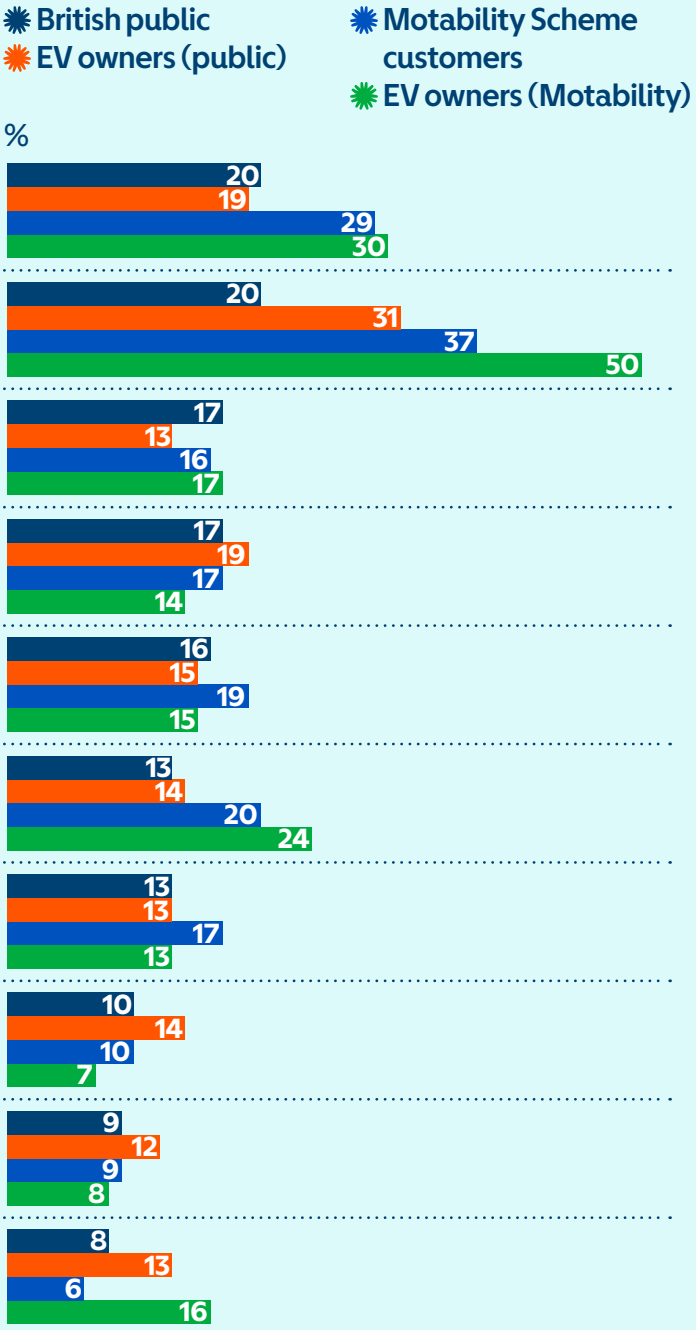
Charging concerns apply the brakes on the transition

Our previous research found that charging concerns represent one of the other key barriers to EV adoption, alongside cost perception. Asked directly to select which three potential changes would have the biggest positive impact on their willingness to choose an EV, having the ability to charge an EV at their home (20 per cent) and EVs having greater driving ranges were joint first (20 per cent) among the wider public.

Perhaps reflecting their increased accessibility needs and concerns, the emphasis on local, low-cost charging was even more pronounced for Motability Scheme customers. Thirty-seven per cent said longer driving ranges would have the biggest potential impact on their willingness to buy or lease an EV, while 29 per cent said the ability to charge their EVs at home would have the biggest impact.

Addressing charging concerns would have the biggest positive impact on Britons' willingness to buy EVs

If the following changes were to occur, which would have the biggest (positive) impact on your willingness to buy an electric vehicle? Please select up to three.



Base: All adults.

The pronounced importance of charging concerns for Motability Scheme customers also extended to those already driving electric, half (50 per cent) opted for longer driving ranges and 30 per cent cited the ability to charge at home as having the most positive impacts.

"Charging points are still an issue at the moment so I wouldn't be a hundred percent convinced but I do like the idea of having an electric car just for school runs after school clubs and things like that."

Brendan, Product Manager, Bury

Landlord barriers risk leaving many behind

While the ability to charge at home would have one of the biggest positive impacts on drivers' willingness to choose an EV, there is a significant gap between this aspiration and what people believe is possible in practice. For many, whether they can install a home charger depends on their landlord's approval.

Just over 4 in 10 (42 per cent) of renters among the wider UK public say their landlord either would allow them, or they think would allow them, to install a home charger. However, almost 3 in 10 (29 per cent) say their landlord would not allow it or believe they wouldn't. This uncertainty creates a major barrier to home charging access.

For disabled drivers on the Motability Scheme, the picture is similar. While 45 per cent believe or know their landlord would allow them to install a charger, more than a quarter (28 per cent) think or know they would not. Given the importance of nearby, low-cost, and accessible charging, this level of uncertainty could have an even greater effect on their confidence in the transition.

But many people may be discounting home charging before testing what is possible. With recent Government steps to simplify installation – including the removal of planning-permission requirements – raising the question with landlords could open the door to home-charging options that might otherwise be overlooked.

However, uncertainty alone is enough to slow progress. Installing a home charger could be thought of in the same way as arranging broadband – a practical utility that people increasingly rely on. If the UK is serious about delivering a smooth and inclusive transition, policymakers should consider making it mandatory for landlords to allow residents to install a home charger, except in exceptional circumstances.

The public charging trilemma

Among policymakers seeking to drive forward the EV transition, there is significant debate about the best route to addressing public concerns over public charging[1], such as whether to prioritise faster charging points or install more affordable but slower charging points.

"A lot of people only charge their vehicles overnight. They switch themselves on about 12 o'clock midnight, so it's on a cheaper tariff or something like that and it costs you less money and it switches itself off once you've done a full charge."

Brendan, Product Manager, Bury

When choosing their preferred EV charging points and having to prioritise either speed, proximity and cost, in our conjoint experiment, there was a clear winner. For both the wider public and Motability Scheme customers, the tariff or cost of charging proved to be the most important factor in determining which charging point respondents opted for.

When isolated to these three factors, the charging tariff or price was responsible for 52 per cent of Britons' decisions with proximity to the charger responsible for 27 per cent and charging speed responsible for 20 per cent. Cost was also the most important factor for Motability Scheme customers as well, being responsible for 48 per cent of their choice.

A focus group in South Lancashire reinforced this conclusion. It was clear that these potential EV buyers envisioned only two scenarios in which they would charge their vehicle. The first would be when they were at home and carrying out a full charge. In this scenario, charging speed was of little value for them as they could do it overnight, and cost and practicality were most important. The other scenario was when they were going on a long drive that would take them towards the end of their vehicle's range. In this situation of being mid-journey, they suggested they would prioritise the speed of their charge.

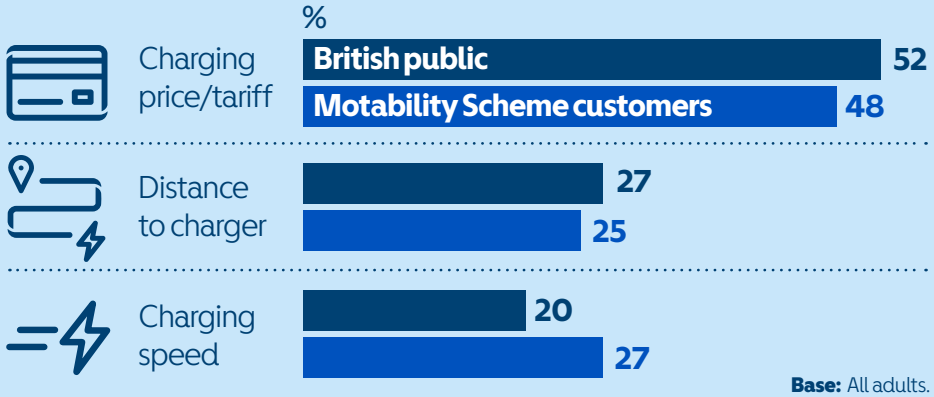
Asked whether they would prioritise speed, proximity or low cost in the public charging network if they didn't have access to home charging capabilities, the focus group participants opted strongly for lower costs. While they would be willing and able to prioritise more expensive ultra-rapid charging points in rare mid-journey emergencies, many outlined that keeping costs down through longer, overnight charges would be their priority.

"It depends on the amount of miles you're doing. If you're only trotting around and you're doing it once a month, then alright, if you are using your car regularly and you constantly have to use those faster charging services, you're not actually then saving any money having an EV, it's just the same, probably more expensive than having a car with fuel."

Helen, Transformation Manager, Ramsbottom

For Britons and Motability Scheme customers, the tariff rate is the most important factor for determining the charging point they opt for

Relative attribute importance in conjoint experiment



Base: All adults.

1 Electric vehicles: Govt must overcome delays for charging network rollout to succeed - Committees - UK Parliament, https://committees.parliament.uk/committee/127/public-accounts-committee/news/205741/electric-vehicles-govt-must-overcome-delays-for-charging-network-rollout-to-succeed/

When choice is limited, costs rise

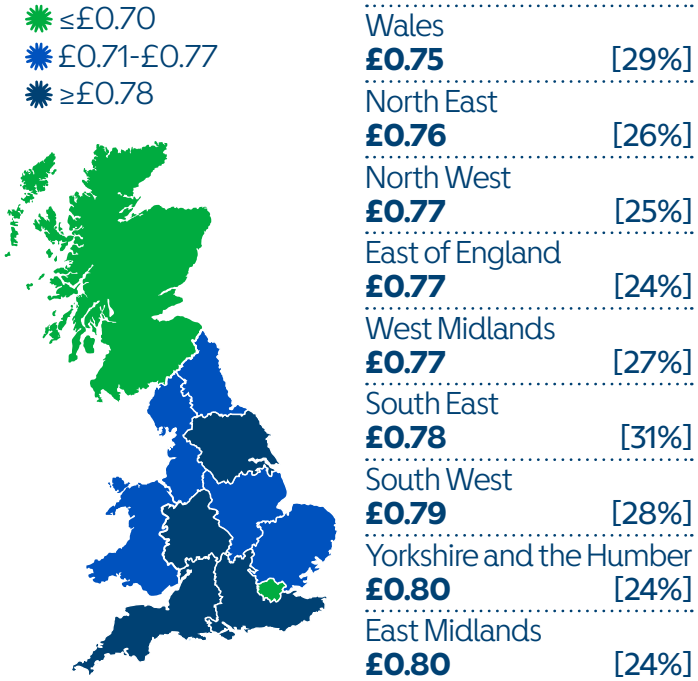
However, when looking at real-world charging behaviour via the Motability Scheme's Go Charge app – which gives customers access to charge points from a range of operators across the UK – a different pattern emerges.

Disabled drivers on the Motability Scheme tend to rely more on rapid-charge operators than on slower, lower-cost networks – demonstrating a clear mismatch between what drivers want from public charging and what they can currently access. From January to 1 December 2025, Motability Scheme customers paid an average tariff of 74p/kWh. The three most frequently used operators averaged 86p/kWh, 78p/kWh and 83p/kWh.

Importantly, this is a pattern seen among both Motability Scheme customers and the wider public. Utilisation data from Zapmap found 71 per cent of charging sessions take place at more expensive, rapid and ultra-rapid chargers, while only 29 per cent occur at more affordable, slow or fast chargers[2].

This charging behaviour is shaped by availability. While the number of slow and fast charge points is increasing across Britain[3], in many areas there still aren't enough to support affordable charging close to home. Zapmap and Field Dynamics data shows many people still face long distances to reach their nearest charge point.[4]

Scots and Londoners are paying less to charge their EVs



Scotland
£0.63 [36%]

London
£0.68 [81%]

Wales
£0.75 [29%]

North East
£0.76 [26%]

North West
£0.77 [25%]

East of England
£0.77 [24%]

West Midlands
£0.77 [27%]

South East
£0.78 [31%]

South West
£0.79 [28%]

Yorkshire and the Humber
£0.80 [24%]

East Midlands
£0.80 [24%]

Average Charging Tariff, per kWh, paid per region – Motability Scheme customer Go App data. [% of households in region who live within a 5 minute walk of an EV charger. Source: Field Dynamics Research].

> **"Where I live, public transport is too far away for me to access so my car is essential. I'm lucky to have a home charger for my EV, which means charging is great value. If I had to rely more on the public network, I would definitely need to prioritise the cost of the charge over the speed."**
>
> Joseph, Motability Scheme customer

Our own survey findings reinforce this: just 11 per cent of Motability Scheme customers and a quarter of Britons (25 per cent) believe there are enough affordable, slower charging points across the UK.

Where drivers live closer to their nearest charge point, actual charging behaviour aligns more closely with preferences for slow and cheaper charging sessions. Eighty-one per cent of Londoners are within a five minute walk of their closest charge point. Among EV users on the Motability Scheme, 58 per cent of all charging sessions in the capital took place on slow/fast connectors – the highest proportion of any region.

By contrast, in regions where charge points are much further from home, use of these lower-cost options falls sharply. In the East Midlands, where only 24 per cent of the population are within a five minute walk of a charger, just 10 per cent of sessions are on slow and fast chargers.

Addressing the gap between what drivers want – affordable, local, everyday charging – and what is available on the ground is vital for the UK's transition. While rapid and ultra-rapid chargers have an important role to play, many drivers want their regular charging to take place at the lowest possible cost and as close to home as possible.

Policymakers and planners navigating the charging trilemma of speed, proximity and cost should therefore prioritise the latter two by expanding local, slower public charging and supporting access to home charging wherever possible.

2 Public charge point utilisation - Zapmap, https://www.zapmap.com/ev-stats/charging-utilisation-stats
3 EV charging statistics 2025 - Zapmap, https://www.zapmap.com/ev-stats/how-many-charging-points
4 Field Dynamics, https://field-dynamics.co.uk/research/public-charger-catchment-research/

Cold weather, cold feet?

For many, cold weather only heightens worries around EV range and charging. Nearly three in ten Britons (29 per cent) believe that EVs lose range in winter, while a quarter (25 per cent) think cold weather slows charging speeds.

Among those already driving electric, awareness is even sharper: 52 per cent of disabled EV drivers on the Motability Scheme say cold conditions worsen charging speeds and 69 per cent believe they reduce range.

Real-world behaviour reinforces these perceptions. Data from the Motability Scheme's Go Charge app shows that customers charge their vehicles around 16 per cent more often in the colder winter months than in summer, reflecting the natural reduction in battery efficiency at lower temperatures.

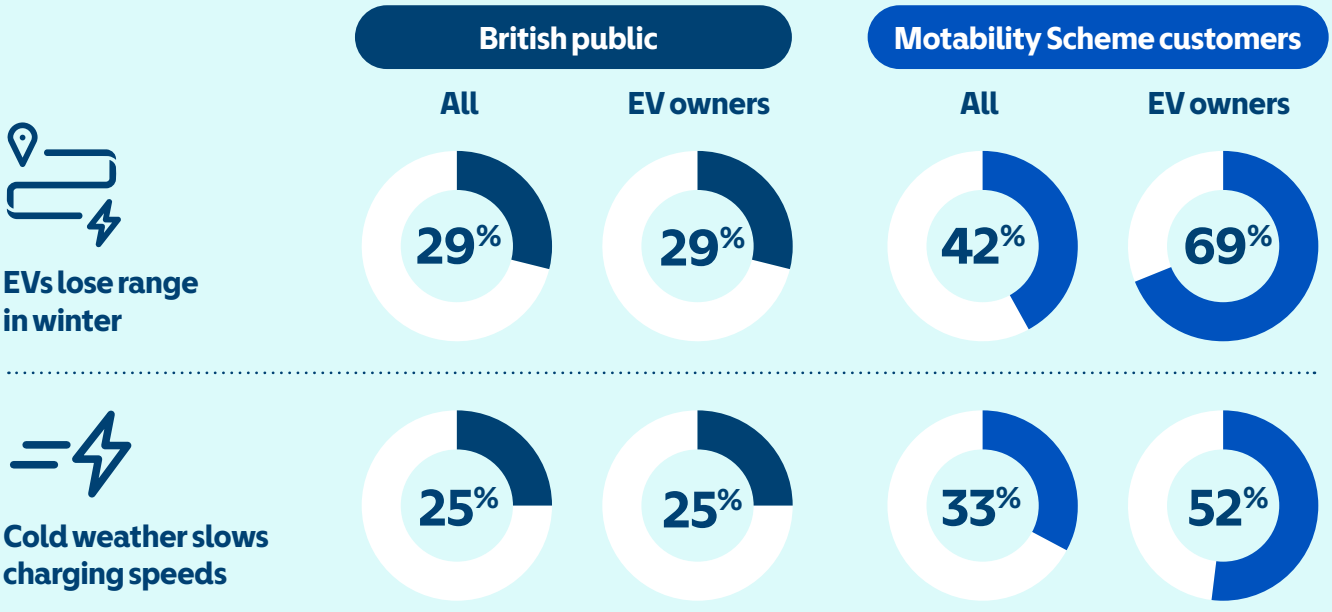
For drivers who are not prepared for these changes, winter can feel like a barrier to choosing an EV. But, importantly, cold weather affects all vehicle types. Research has shown that petrol and diesel cars can also lose around 10–20 per cent of their fuel efficiency in winter due to engine warm-up time, increased air density, tyre-pressure changes, and battery performance[5].

In the same way drivers became used to the impact of cold weather on petrol and diesel vehicles, the experiences of early EV adopters demonstrates that once people understand how the winter months affect EV range – and how to plan for it – these seasonal shifts become more manageable.

We support our customers to build this confidence, through tools such as an EV Journey Planner, to help them understand where and when they can charge, particularly during colder months when they may need to top up slightly more often. With the right information and support, drivers can adjust their charging habits and become reassured that they will have reliable access to chargers throughout winter.

As the UK looks to convince the next cohort of EV considerers to shift to electric, industry players should adopt similar approaches: giving drivers clear guidance, preparing them for seasonal changes, and providing practical tools that help them plan ahead.

Motability Scheme customers are particularly conscious of the seasonal impacts on EV performance



Question: To what extent if at all does cold weather make the following better or worse when it comes to electric vehicles? Percentages are for the proportions saying it makes things worse. **Base:** All adults.

5 Fuel Economy in Cold Weather, https://www.fueleconomy.gov/feg/coldweather.shtml

Moving the UK from hesitation to progress

As the UK deadline of phasing out new petrol and diesel vehicles by 2030 grows ever closer, it has been encouraging to see opposition softening among those who previously said they would not consider an EV.

Yet in reality the uptake of EVs is not progressing at pace and important challenges remain. Concerns about cost, access to both home and public charging, and confidence in colder weather continue to shape how drivers feel about making the switch. For disabled drivers, who rely on their vehicles every day for their independence, these barriers can have an even greater impact.

While our findings again underline the power of experience, the challenge now lies in enabling the next cohort of people – those considering an EV – who may be more cautious or constrained by practical barriers, to gain that same first-hand experience.

We are supporting customers on the Motability Scheme with tools to navigate charging, transparent information on running costs, and crucially providing avenues for them to experience EVs first-hand. But meeting the UK's Zero Emission Vehicle (ZEV) mandate will require more coordinated action across Government, industry and infrastructure providers to ensure the benefits of driving electric are known and accessible to everyone.

Connect with the Motability Scheme

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