

May 2026

# EV Transition Tracker





# Foreword

**The transition to electric vehicles (EVs) is unfolding unevenly across the UK. Our fourth wave of the Motability Scheme EV Transition Tracker shows that while positivity towards EVs remains steady, the growth trajectory is not as steep as Government intended or projected, with too many barriers still preventing people from making the switch.**

What emerges clearly from the last quarter is a transition defined by tension. On one hand, volatility in oil and gas markets is strengthening the case for EVs, reinforcing the long-term financial benefits and relative stability of charging costs. On the other, research suggests that domestic uncertainty, from the Government's intent to introduce a pay per mile tax, may risk undermining driver confidence at a critical point in the transition.

At this stage, certainty matters. For many, the decision to switch depends on confidence that the costs, infrastructure, and the policy environment will support them over the long term. For disabled people on the Motability Scheme, this need for certainty is often greater. While many are open to making the switch, practical barriers – particularly around cost and access to charging – continue to shape attitudes in ways that differ from the wider public. Without targeted action, there is a real risk that the transition could accelerate for some while stalling for others.

This sense of uncertainty is also shaped by where people live. The divide between urban and rural areas, and between regions where local infrastructure is progressing at pace and those where it is not, risks creating a fragmented national picture. Where action taken by local councils is visible, confidence grows; where it is not, hesitation remains. A successful transition will depend not only on national policy, but on consistent local delivery.

This report provides a detailed snapshot of where the UK stands today: a nation at an amber moment in the transition. While the direction of travel is clear, the conditions needed to move decisively forward are not yet in place.



**Andrew Miller**  
CEO, Motability  
Operations



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# Transition in amber

It has now been two years since the UK Government introduced the Zero Emission Vehicle (ZEV) mandate, requiring 80% of vehicles to be zero-emission by 2030.

While UK Government aspirations remain high, for many Britons the proposed introduction of a pay per mile tax on EVs seems at odds with these plans – acting as a deterrent for some who were considering switching to an EV.

Where the national landscape is already complex, international politics adds another layer to navigate – with EVs now appearing more appealing across Europe due to the impact of the outbreak of war in Iran on oil and petrol prices<sup>1</sup>.

Despite the many factors at play, Britons' attitudes towards EVs remain stable and in line with the findings from our last Transition Tracker – the fieldwork for which took place just before the UK Autumn Budget in November 2025.

In particular, EV owners continue to hold very positive views towards their vehicles, with 96 per cent viewing them positively – up by 8 per cent from November. Motability Scheme customers who own an EV have similarly positive views at 80 per cent, however, this has declined slightly from 85%.



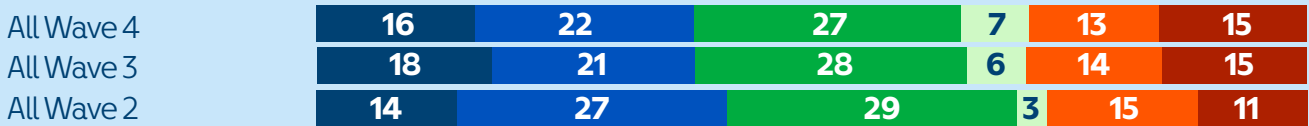
<sup>1</sup> <https://www.theguardian.com/environment/2026/apr/20/electric-car-ev-sales-mainland-europe-petrol-prices-iran-war>

## EV owners' positivity has increased in the UK public, but waned for Motability Scheme customers

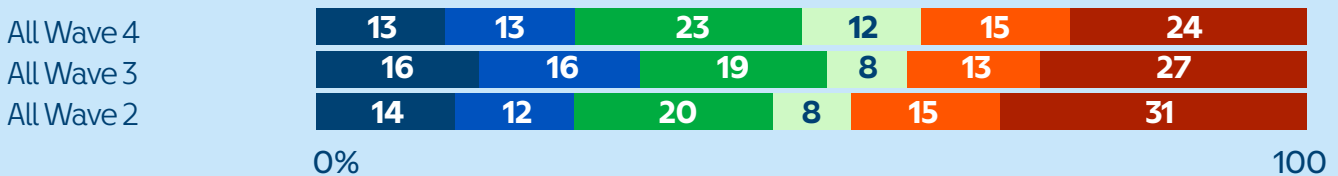
To what extent, if at all, would you say you have a positive or negative opinion overall of fully electric vehicles (i.e. not a hybrid)?



### British public

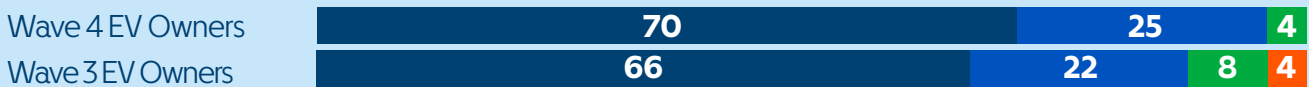


### Motability Scheme customers

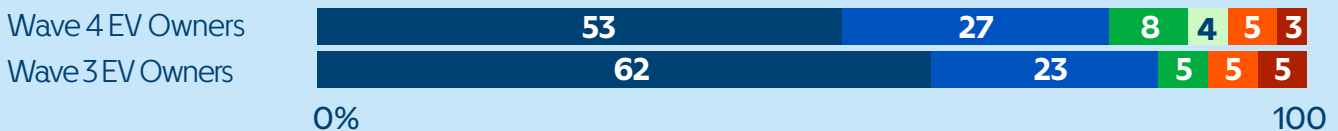


## EV owners positivity towards electric vehicles

### British public – EV owners



### Motability Scheme customers – EV owners



Base: All adults.

Similarly, the British public continues to be more positive towards EVs than disabled drivers on the Motability Scheme – with 38 per cent and 27 per cent holding positive views respectively. The main reasons for which – cost, charging accessibility, and proximity – we explored in the last Tracker.



Younger people continue to be more positive towards EVs, with the most positive being in the 25-34 age range (at 56 per cent), and the least aged 75 and above (20 per cent).



Men tend to be more positive than women (44 per cent against 32 per cent).



Just 30 per cent of those living rurally or in villages have positive views of EVs, significantly less than those living in cities (48 per cent).



# Ready in theory, reluctant in practice

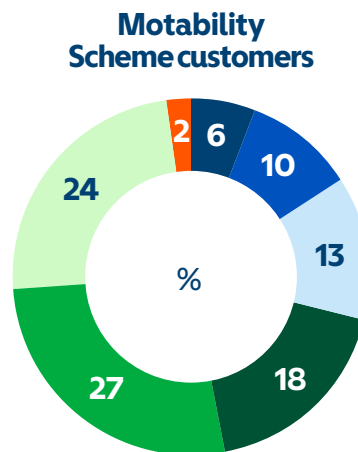
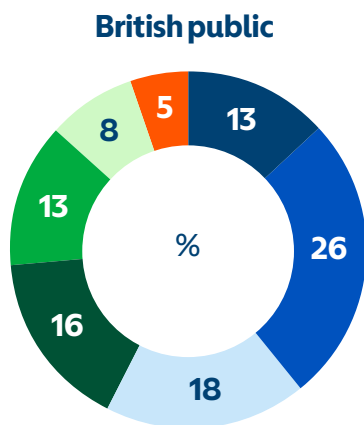
Beyond positivity, willingness to actually purchase an EV has also remained stable since our last Tracker. 42 per cent of those who plan to buy or lease a car in the future say they would consider an EV for their next vehicle. Once again, there are fewer Motability Scheme customers feeling the same way, at just 29 per cent considering an EV – highlighting a persistent gap in confidence that must be addressed if the transition is to work for disabled drivers.

Among those considering an EV, there are noticeable differences in demographic makeup. Across age groups, those in the public considering an EV are most likely to be between the ages of 25 and 34 (26 per cent), while those on the Motability Scheme are more likely to be 55 and above (53 per cent).



## Young people more likely to consider EVs

- 🌟 18-24
- 🌟 25-34
- 🌟 35-44
- 🌟 45-54
- 🌟 55-64
- 🌟 65-74
- 🌟 75+



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

Within the public, this may be because younger people tend to be more interested in the environmental credentials of EVs, while older Motability Scheme customers are more likely to live in housing that enables them to install a home charger – making a huge difference to those with mobility needs.

This is also reflected when looking at EV consideration by home ownership. Disabled customers living in detached or semi-detached housing are far more likely to consider an EV (35 per cent) than those in terraced housing or flats (at just 20 per cent) – with anxieties around being able to easily access a charging point contributing to this gap.

## Willingness to buy an EV is stalling

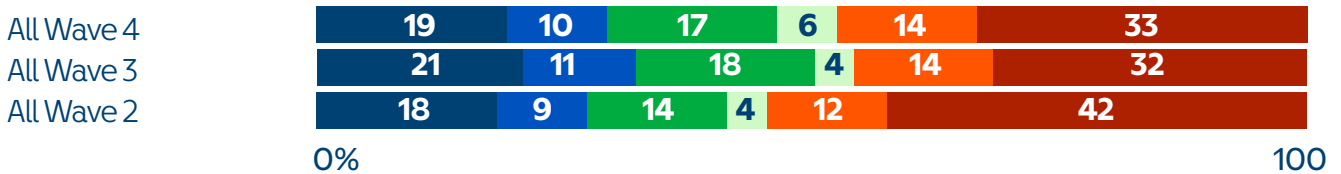
Thinking about the next car or van you will buy or lease (either new or used), to what extent would you or would you not consider buying a fully electric vehicle (i.e. not a hybrid)?

- ✱  
 Would definitely consider
- ✱  
 Would probably consider
- ✱  
 Undecided
- ✱  
 Don't know
- ✱  
 Would probably not consider
- ✱  
 Would definitely not consider

### British public



### Motability Scheme customers

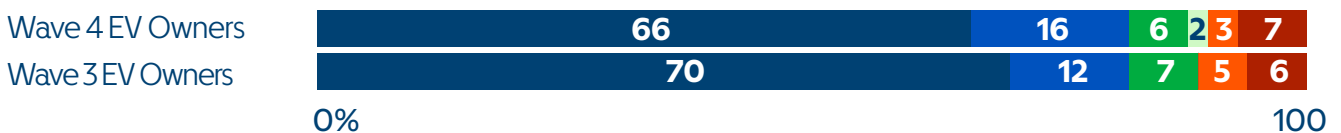


## EV owners stick with the transition

### British public – EV owners



### Motability Scheme customers – EV owners



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

Unsurprisingly, personal finances are another factor impacting willingness to shift. Disabled customers who consider themselves to be relatively well off are most likely to say they are considering an EV, at 42 per cent. While this falls to just 25 per cent among those who say they are struggling to make ends meet, it is perhaps more interesting that of those who say they 'do not have money for luxuries', 29 per cent are considering an EV for their next vehicle. This suggests that EVs are no longer seen as a premium choice, but a practical everyday alternative to petrol and diesel vehicles.



# Price and practicality problems persist

To the British public, the number one thing that would move the dial and make them more likely to buy an EV is if they cost the same to buy or lease as petrol, diesel and hybrid vehicles (25 per cent). This has risen from 17 per cent in November, showing how cost concerns are increasingly becoming more important for Britons as the cost-of-living crisis continues.

In conversation, EV drivers reference initial subsidies as the main reasons they chose to make the switch before the secondary benefits became apparent.

The most influential changes, for **Motability Scheme customers**, that would impact an EV purchase



**"I think maybe this is more relevant to the Londoners, but the free congestion and cheap parking was a real pull early on, but that's gone now..."**

Lara, Retail Worker, North London

**"Comparing leasing a diesel to an electric, I think the net saving was three and a half, four grand a year. So that was the initial decision making process, but we've had electric for three years. It is absolutely unbelievable. It's just an amazing car. Yeah, I love it."**

Russ, Interior Designer, South London

**"I think they could definitely give more incentives in terms of the price. I think it did have didn't they? But no, yeah, they could definitely do more. Because if they're wanting everyone to do this, then they need to provide support and incentives."**

Henry, Teacher, Leeds

To Motability Scheme customers, on the other hand, range and access to chargers remain much more important – reflecting the greater reliance many disabled drivers have on consistent, reliable charging to support everyday mobility. 28 per cent of customers name range as their most important factor, while 27 per cent cite the ability to charge at home.

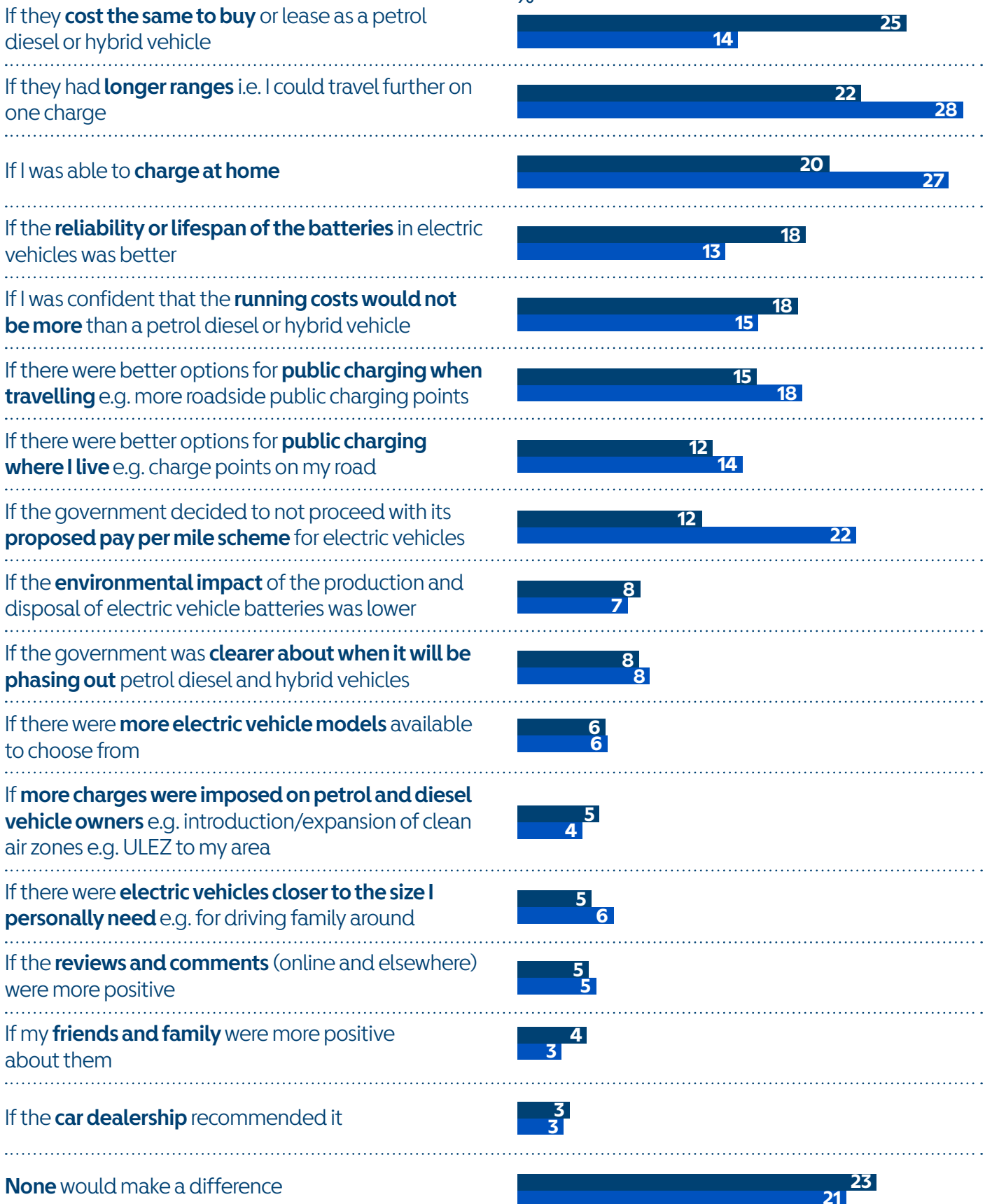


## Cost and range are most likely to make Britons consider an EV

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.

 **British public**  
 **Motability Scheme customers**

%



Base: All adults.

# Watts the hold up? Chargers divide the UK's transition

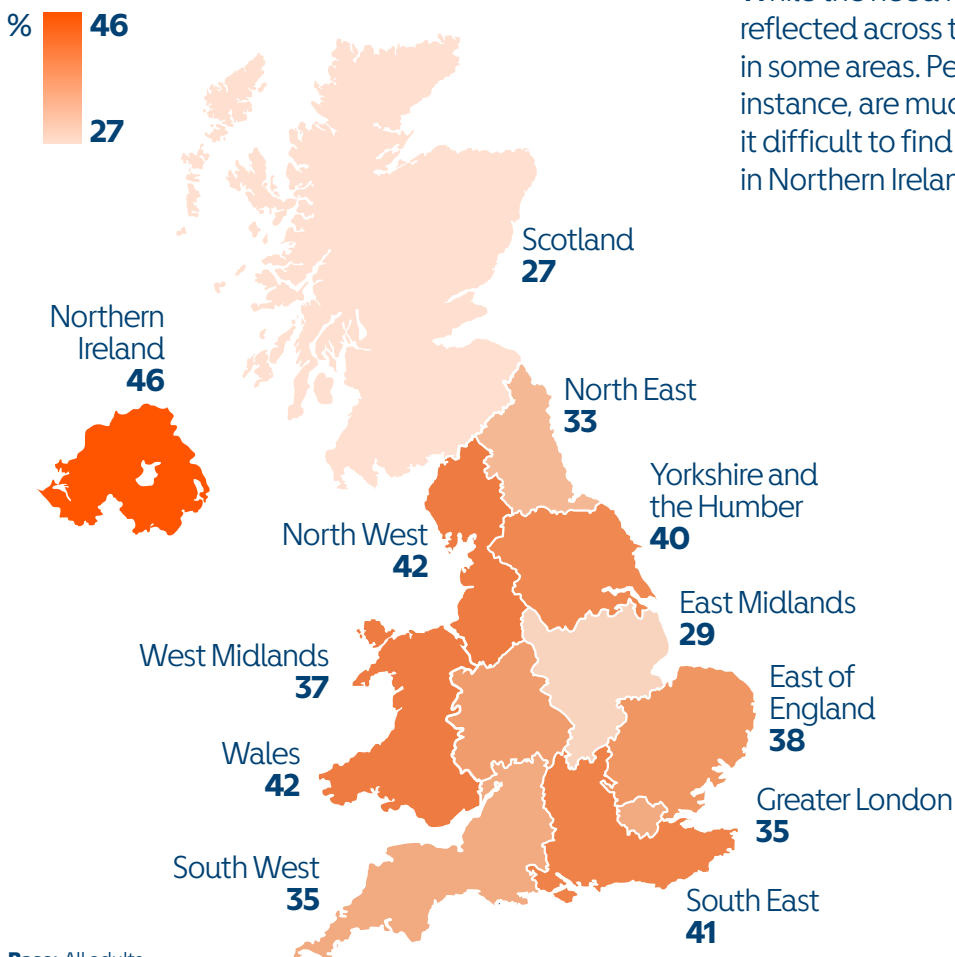
For disabled drivers on the Motability Scheme, improving charging provision remains critical to making the switch. However, this is not a challenge unique to Scheme customers.

Currently, over a third of Britons (35 per cent) say it is difficult to locate chargers in their local area, highlighting a continued gap in the visibility and accessibility of public charging infrastructure.

For those already considering an EV – arguably the most important group in the next phase of the transition – this becomes even more significant. A fifth (19 per cent) say that having more publicly available charging points in their local area would have the biggest positive impact on their likelihood to switch.



## Britons who find it difficult to locate the nearest available charging points



While the need for greater charging provision is reflected across the country, it is felt more strongly in some areas. People in Greater London, for instance, are much less likely to say they would find it difficult to find a charging point than those living in Northern Ireland, with a 13 per cent difference.

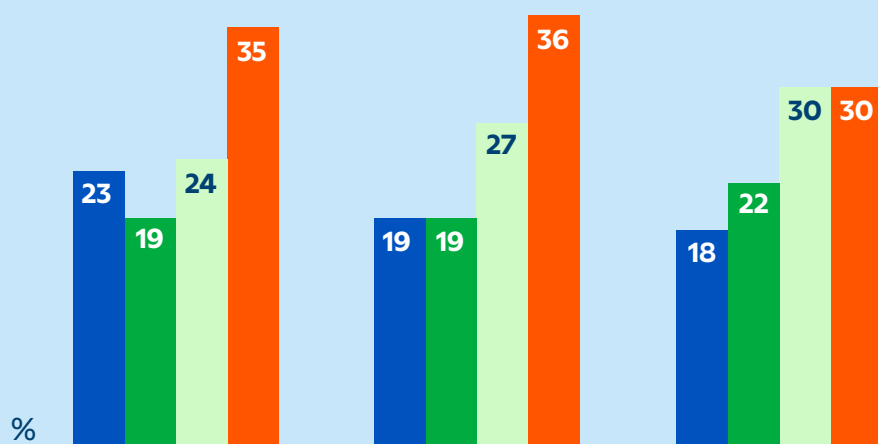
Clearly, expanding charging infrastructure will be critical to ensuring the transition works for drivers. But this rollout will take time, and drivers cannot be expected to wait for the network to catch up.

Alongside this, helping drivers navigate the existing network will also be essential. To support this, we provide Motability Scheme customers with an EV Journey Planner, helping them plan journeys using public charge points and travel with greater confidence.

### Britons don't think that the charging infrastructure is ready for the transition

Please indicate to what extent you **agree** or **disagree** with the following statements...

✳ Agree
 ✳ Neither agree or nor disagree
 ✳ Don't know
 ✳ Disagree



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



There are enough high-speed public charging points across the UK.



There are enough more affordable slower public charging points in the area across the UK.

Base: All adults.



# Rural areas left in rear-view

The role of local councils in the transition towards electric cannot be overstated. While the Government sets national policy, local authorities are required to deliver on-the-ground infrastructure, vital for spurring public confidence in EVs.

For those who are considering buying an EV, 44 per cent say installing more charging points is one of the most important steps councils could take to improve their likelihood of transitioning to an EV.

However, Britons are more likely to say that their local council is doing badly<sup>2</sup> at installing electric charging points along roads (37 per cent) than well<sup>3</sup> (30 per cent).

While negative sentiment is shared across the UK, once again, some areas feel more strongly about the lack of work from their councils than others. Positively, almost half (49 per cent) of those living in Greater London feel that their council is doing well at installing public charging stations. Those in the East Midlands (36 per cent) are second most likely to feel positively about this, significantly more positive than the average Briton making the East Midlands and Greater London the two regions where the public are positive about performance of the council in installing roadside EV chargers.

At the other side of the spectrum, the South East and South West of the country are lagging behind, with just 22 and 23 per cent of residents saying their local authorities are handling this part of the transition well.

With those in Greater London most likely to say they are considering an EV for their next vehicle (45 per cent), and those in Wales least likely (26 per cent), this points to the importance of trust in local councils to deliver the infrastructure needed before drivers will be willing to make the switch.

Perhaps unsurprisingly, urban areas across the UK perform better than their rural counterparts, with 45 per cent of residents saying their local councils are doing well at installing roadside public charging points, compared to 21 per cent in rural areas.



Some of the weakest performance is seen in rural parts of the South East and South West, where just 16 per cent of residents say their councils are doing well.

A similar pattern emerges in the North of England. In the North West, for example, almost half of urban residents (47 per cent) say their council is performing well, compared to just 20 per cent of those in rural areas. This urban–rural divide is consistent across the UK.

In focus groups, members of the public living in rural areas expressed their surprise at the fact that their urban counterparts even had access to publicly available charging points, showing the divide between parts of the country – particularly rural and urban.

**"I haven't actually thought about it before... but I can't think of a public charger near me. I travel to London quite a lot, and I know you can even charge at lampposts. There is nothing like that near me... it clearly highlights the need and an inconsistency with the local government here".**

Baylie, Human Resources Manager,  
Trowbridge

<sup>2</sup> Either 'very' or 'somewhat' badly

<sup>3</sup> Either 'very' or 'somewhat' well

## How well do Britons think their councils are doing on the EV transition?

How well is your local council doing at the following...

% agree, my council is doing well



Installing more electric vehicle charging points along roads

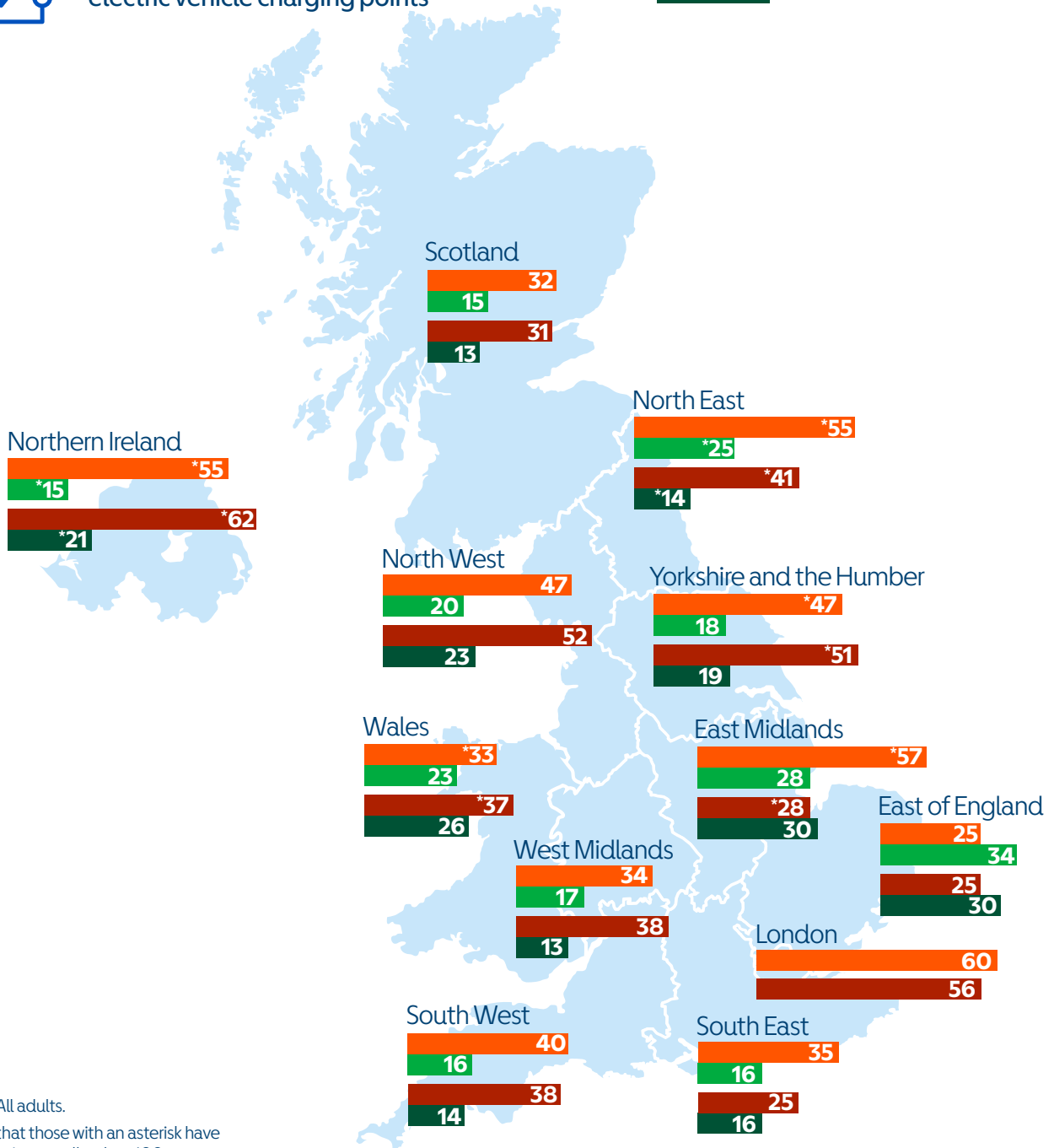
All

Urban 57  
Rural 29



Helping social and private renters access electric vehicle charging points

Urban 55  
Rural 28



Base: All adults.

\*Note that those with an asterisk have sample sizes smaller than 100.

Given the importance of reliable public charging to EV adoption, this presents a clear opportunity for local authorities to accelerate the transition by ensuring residents have access to visible, accessible infrastructure.

If left unaddressed, gaps in local provision risk turning the EV transition into a story of two Britains: one charging ahead, the other left behind.

# Renters shut out of the switch

Similarly, when it comes to helping those in social housing and private rental accommodation access charging points – an issue particularly pertinent to Motability Scheme customers – some parts of the country far outperform others.

While Britons are slightly more likely to say their councils are doing this badly (31 per cent) than well (30 per cent), the real differences are across the regions. London again races ahead with over half of inhabitants saying their local councils are doing a good job of helping renters access EV charging points, while in the South East just 20 per cent feel this way.

**“My husband and I have considered an EV but been put off for many reasons. We don’t own our home and it’s rare to find a home charger in rented accommodation – I don’t want to spend hours in a supermarket car park charging as a result. Until everyone can access home charging more easily, it will present another barrier to disabled people’s independence.”**

Imali, Motability Scheme customer, Dorset

While Government funding is available to support the installation of EV charge points in rented homes – with residential landlords able to access infrastructure grants of up to £30,000 per property – there is no requirement for them to approve a tenant’s request to install a home charge point.

As a result, access to home charging depends on individual landlord decisions rather than a national framework – with outcomes varying across the country.

Those in low-income households are also much more likely to say their council is doing badly at assisting with the provision of charging points to renters, with only 15 per cent of those who struggle to afford their costs saying their council is doing this well.

**“I live in a terraced house, and I did phone the council and asked them if they put it in [charging cables] because Motability offered to pay for it. And they said it was a hazard. But I live in a terraced house and there’s no other way to install one. And this is just three feet away from my front door”.**

Jo, Retired Midwife, Barnet

With almost two thirds (64 per cent) of Scheme customers living in rental accommodation or social housing, local councils have a clear role to play. Without targeted action to expand accessible charging for renters, the transition risks reinforcing existing inequalities – leaving those without off-street parking, and often those on lower incomes, with the fewest options.

That is why we are working to make cross-pavement charging solutions more accessible for drivers without off-street parking. This includes partnering with local authorities across the UK to support trials – identifying Motability Scheme customers to take part.

**“You just have to be super organised [charging]... but locally where we are, if you go to a pulse, there’s a queue, if you go to half of the chargers in supermarkets or whatever don’t work, or you don’t have three hours to sit at a slow charge, you just have to be organised.”**

Heidi, Account Manager, Brighton



# Fuel crisis shifts gears on cost perceptions

While the Iran war is having seismic impacts on the global stage, the resulting energy crisis at home is also influencing how drivers perceive the costs associated with electric vehicles.

Previous research in November showed that 38 per cent of the public believed EVs were more expensive to fuel than petrol or diesel cars. This has now fallen to 32 per cent, suggesting a shift in how drivers assess the relative cost of running an EV.



**“Those with petrol or diesel cars have had to be queuing for hours at the pumps, and hopefully that’s not going to happen again, but you can sail past the petrol stations which are becoming fewer and farther between knowing that all things considered equal, you’re not going to run out of juice.”**

Jonathan, Legal Consultant, North West London

These changing perceptions appear to be strengthening confidence among EV drivers, with 93 per cent saying they are likely to choose an EV in the future – an increase of 11 per cent since November 2025.

While this shift is being felt across the population, stable fuelling costs are particularly important for many disabled drivers, who often have less disposable income.

Against this backdrop of international instability, EVs are no longer being judged in isolation, but against the volatility of global fuel markets – and increasingly, they are coming out ahead.

In conversation, participants reflected on how rising petrol and gas prices have made the steadier pricing of electricity more attractive, alongside the ability to take advantage of cheaper tariffs, such as overnight charging.

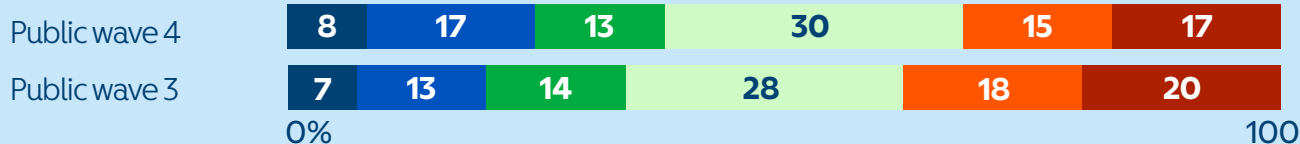
## Perceptions of fuel costs come down with EVs relative to ICE since last wave

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 that cost about the same?

Electric vehicles cost...

- ✱  
**a lot less**  
 than petrol/  
 diesel vehicles
- ✱  
**a little less**  
 than petrol/  
 diesel vehicles
- ✱  
**about the same**  
 as petrol/diesel  
 vehicles
- ✱  
**Don't know**
- ✱  
**a little more**  
 than petrol/  
 diesel vehicles
- ✱  
**a lot more**  
 than petrol/  
 diesel vehicles

### Fuel costs



Base: All adults.

# Braking too soon? Domestic policy impacting EV appetite

As global instability strengthens the case for EVs, there is a risk that domestic policy pulls in the opposite direction.

In the 2025 Autumn Budget, the Government announced that from April 2028, a 3p per mile tax will be introduced for EVs – intended to replace declining fuel duty revenues as the transition away from petrol and diesel accelerates.

**“As an electric vehicle owner, it felt too early to be trying to change the game or change in tune. I feel like you need to get so many more people adopting it.”**

Jamie, Teacher, Oldham

While there are clear fiscal imperatives for this approach, this research suggests the introduction of additional costs could risk stalling progress. Four in ten Britons (39 per cent) and nearly six in ten (57) per cent of Motability Scheme customers say the tax would make them less likely to switch to an EV when considering their next vehicle.

Even among current EV owners – who tend to be more positive about their vehicles – almost a third (32 per cent) say they would be less likely to choose an EV again, rising to over half (55 per cent) of Scheme customers who already own electric.

Underlying the concerns among EV owners was a broader expectation that those who have already made the switch would continue to be supported through incentives over a longer period.

While many understood the need to replace fuel duty, they thought that timing was also critical and that introducing additional costs before EV adoption had fully matured would risk undermining progress at a critical stage in the transition.

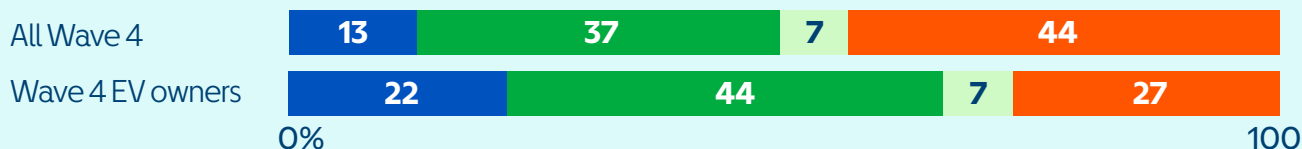
In fact, one third (32 per cent) of Britons who said they were considering an EV agreed the tax would make them less likely to choose one – potentially slowing progress among the group most likely to convert in the near term.

## Motability Scheme customers disproportionately impacted by the pay per mile EV tax

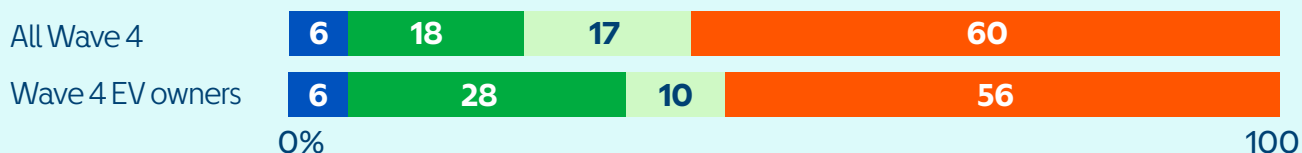
The government has announced that they will introduce a 3p per mile tax on electric vehicles from 2028. Do you think this will make you more or less likely to consider buying an electric vehicle for your next vehicle?

★ More likely
★ It will make no difference
★ Don't know
★ Less likely

### British public



### Motability Scheme customers



Base: All adults.

# Conclusion

**The findings from this latest wave of the EV Transition Tracker point to a transition that is holding steady – but not moving at the pace required to meet national ambitions, nor ensure parts of society aren't left behind.**

Encouragingly, attitudes towards EVs remain broadly stable, and global pressures on fuel prices are also shifting perceptions, strengthening the economic case for EVs in ways that were less evident just a year ago.

However, stability should not be mistaken for progress. Willingness to adopt EVs has plateaued – particularly for disabled drivers on the Motability Scheme, for whom the transition must be practical, reliable, and accessible. Concerns around charging availability, costs, and the practicality of home charger ownership continue to limit wider uptake.

At the same time, policy signals risk pulling in different directions. While the long-term ambition of the ZEV mandate remains clear, research suggests the introduction of the pay per mile tax may weaken the financial case for switching at a crucial stage in the transition. For many, confidence in the long-term direction of travel is as important as the vehicles themselves.

What this report makes clear is that the next phase of the transition must focus on delivery. Expanding accessible, reliable charging infrastructure – particularly in rural areas and for those without off-street parking – will be essential. So too will ensuring that the transition remains financially viable, with the right balance of incentives and costs to support sustained adoption.

Above all, the transition must be inclusive. Without deliberate action, there is a risk of deepening existing inequalities – between regions, income groups, and those with and without additional mobility requirements.



# Methodology

## Quantitative

### UK public survey

A nationally representative sample of 3,897 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 27 and 30 March 2026. Polling for the Wave Three, Wave Two and Wave One surveys (for the three previous Trackers released in 2025) took place between 10-15 November, 8-12 August and 17-22 April 2025 respectively. Unlike the first two waves, which were restricted to adults aged between 18 and 75, waves three and four include adults of all ages, including those aged 75 and above.

### Motability Scheme customers survey

A survey of a sample of Motability Scheme customers was fielded. A sample of 40,000 current Motability Scheme customers were invited via email to take part in the survey, which was conducted online. More in Common interviewed a sample of 1,806 Motability Scheme customers aged 18+. Fieldwork was conducted between 13 and 18 March 2026. 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, and gender. 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.

## Qualitative

An online focus group of nine participants, all from across England, was moderated by More in Common on 8 April 2026. Participants were recruited to the focus group according to the following criteria:

- ✱ Mixture of genders, socioeconomic grades and ages
- ✱ All EV owners and drivers
- ✱ All to say they are likely to buy a new vehicle within the next five years
- ✱ Half say their council are doing 'very' or 'somewhat' well with supporting the EV transition, the other half say their council are doing 'very' or 'somewhat' poorly.





Connect with the Motability Scheme

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