Motability Scheme | More in Common

MOTABILITY.CO.UK

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EV Transition Tracker



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Foreword

The UK's phase out of new petrol and diesel vehicles is fast approaching. While there are encouraging signs of growing EV consideration, our latest research has shown that being open to choosing an electric vehicle (EV) means little if the barriers to making the switch are not addressed.

Since we launched the EV Transition Tracker in April last year, attitudes among the wider public have remained broadly stable, while disabled customers on the Motability Scheme have become more positive and more likely to consider choosing an EV in the future.

But consideration alone will not ensure UK motorists are not left behind by the transition. What matters now is whether people have the confidence, financial means and practical ability to act on the switch.

Our latest findings show that this isn't the case. Many people still feel locked out – and, critically, for very different reasons.

For the wider public, cost and perceptions of EVs continue to hold people back. For disabled drivers, the barriers are often much more practical. If you cannot charge at home, lift a charging cable or get close enough to a chargepoint to use it, an electric vehicle is simply not an option.

With the Government under pressure from manufacturers to weaken the ZEV mandate, there will continue to be debate about the pace of the transition. But we should not wait to tackle the problems we already know exist.

Drivers need clear, trusted information about the real costs and practicalities of going electric. And disabled people need a charging network that works for them in practice – at home, locally and on longer journeys.

More chargepoints are important, but numbers alone will not solve the problem. A chargepoint that someone cannot physically use is not a solution.

Our customers depend on their cars for their independence. As the UK moves away from new petrol and diesel vehicles, we need to make sure they continue to have that freedom.

That means government, industry and local authorities working together now to remove the barriers holding people back and make sure the transition works for everyone.



Andrew Miller
CEO, Motability Operations



Nigel Fletcher
CEO, Motability Foundation

Disabled drivers close the gap on EV attitudes

Despite the impact the Iran War has had on fuel prices and pressure on the UK Government to weaken the ZEV mandate, at first glance, attitudes towards EVs have changed remarkably little. Today, 39 per cent of Britons hold a positive view of EVs, compared with 41 per cent when tracking began in April 2025.

But beneath this stability, something important is changing. Disabled customers on the Motability Scheme are becoming more positive about EVs. When first asked this in August 2025, just 26 per cent viewed EVs positively, while 46 per cent held negative views – a net positivity score of -20. Today, 30 per cent view EVs positively and negative sentiment has fallen to 38 per cent, improving net positivity to just -8.

EV consideration is moving in the same direction. The proportion of Scheme customers willing to consider an EV has increased from 28 per cent last August to 31 per cent today, while the proportion ruling one out has fallen from 54 per cent to 48 per cent.

While this shows that attitudes towards EVs are not fixed, growing openness to electric does not necessarily mean people are able to make the switch in reality.



Scheme customers and UK public feel locked out of the transition

Almost six in ten Britons (59 per cent) and disabled Motability Scheme customers (60 per cent) feel people like them are not being included in the EV transition.

Affordability is a concern for both groups. For the wider public, the upfront price of an EV is the most commonly cited reason for feeling excluded. This is vital for Scheme customers too, as 42 per cent have a household income of less than £20,000.

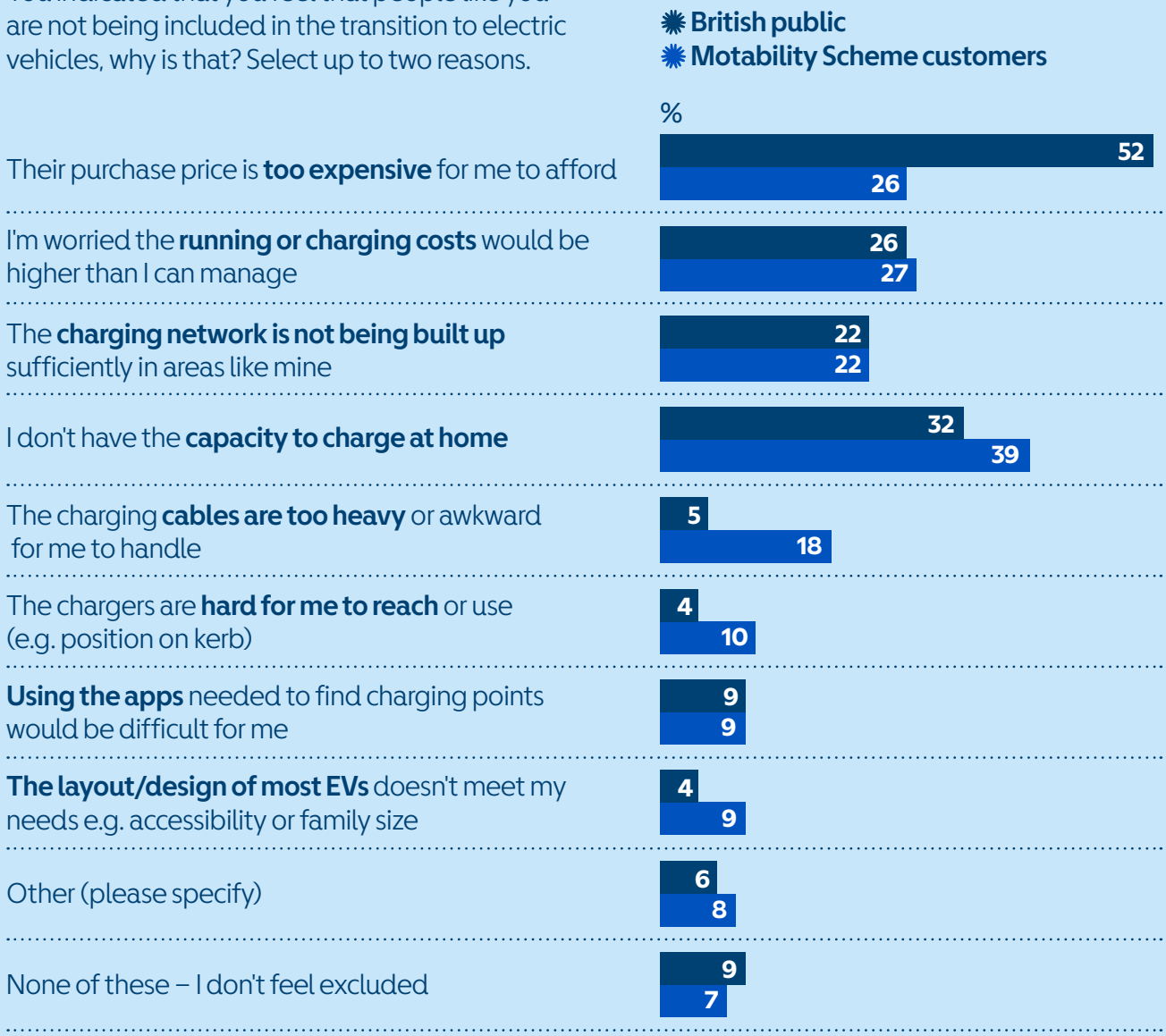
But disabled drivers face an additional set of barriers. Alongside affordability, access to home charging and the physical accessibility of public charging infrastructure can determine whether switching to an EV is practical at all.

A quarter of disabled drivers on the Motability Scheme (25 per cent) select either charging cable weight/ease of use or difficulty reaching charging points due to bay width as a top reason for them feeling excluded from the transition. Among members of the public without an impairment, just eight per cent cite either of these barriers.



Accessibility is a more important concern for Motability Scheme customers

You indicated that you feel that people like you are not being included in the transition to electric vehicles, why is that? Select up to two reasons.



Base: All adults & all Motability Scheme customers.



Scotland risk falling further behind

Our first dedicated Scottish EV Transition Tracker shows that the transition is also moving at different speeds across the country.

Only 31 per cent of Scots view EVs positively, compared with 39 per cent of people elsewhere in the UK. Among Scheme customers, 28 per cent in Scotland hold a positive view of EVs, compared with 34 per cent across the rest of the UK.

The same pattern can be seen in consideration. Just 35 per cent of future vehicle purchasers in Scotland would consider an EV, compared with 44 per cent across the UK as a whole. Among Scheme customers, this figure falls even further to 29 per cent in Scotland.

Importantly, Scotland's greater hesitancy cannot simply be explained by its rural geography. Scots living in urban areas are also significantly more negative about EVs than people living in urban areas elsewhere in the UK.

Our Glasgow focus group pointed instead towards charging being the key barrier. Participants described the difficulties of switching to an EV when living in flats, relying on on-street parking or having no realistic way to install a charger at home.

"It's not apparent how they have considered those in flats. And it just strikes me as a very London-centric transition, which has in no way understood all of the things that we've raised today about Glasgow."

Charlotte, Celebrant, Glasgow

Cost continues to hold the wider public back

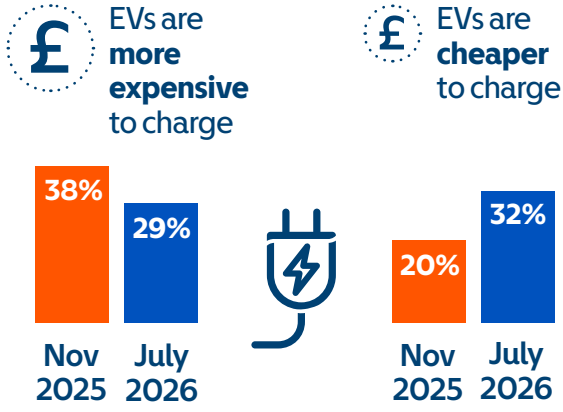
Despite topline attitudes towards EVs remaining broadly stable, the Iran War has shifted perceptions of fuelling costs. In July 2026, for the first time, more Britons saw EVs as cheaper to charge (32 per cent) than petrol or diesel vehicles (29 per cent).

This marks a significant reversal from November 2025, before the conflict took hold, when 38 per cent saw EVs as more expensive to charge and just 20 per cent as cheaper.

"My friend was sitting with his app showing us his payments and it was two pound for this weekend... it was just like 10 pounds for a month for his car. Whereas I could be spending almost 150 pounds a month on petrol for commuting."

John, Teacher, Glasgow

For the first time more Britons say EVs are cheaper to refuel than petrol or diesel



Base: All adults.

But improving perceptions of charging costs have not shifted the bigger affordability concern.

Almost half of Britons (46 per cent) still believe EVs cost more over their lifetime than petrol or diesel vehicles, compared with just 13 per cent who think they cost less. Those figures are unchanged since May and only slightly improved from August 2025, when 49 per cent believed EV lifetime costs were higher.

This persistent perception of higher costs helps explain why affordability remains a key reason the wider public feel locked out of the transition.



Stable headline attitudes mask a divided EV market

While topline attitudes towards EVs have remained stable, this headline picture masks significant divides between groups of drivers.

Among the wider public, younger, more financially comfortable and urban drivers are generally more positive towards electric.

Just 29 per cent of Britons with a household income below £15,000 view EVs positively, compared with 78 per cent of those with a household income above £125,000.

Financial comfort has the strongest relationship with positive attitudes towards EVs, followed by age, education, ethnicity, whether someone lives in an urban or city-centre area, and gender. This reinforces our wider finding that affordability remains a key factor shaping public attitudes towards electric.[1]

But these demographic patterns are much less consistent among disabled Motability Scheme customers. The strong age and rural divides seen among the wider public, for example, are not replicated among Scheme customers.

Demographics alone therefore cannot explain where disabled drivers sit in the transition. To understand what is holding them back, we need to look at the practical barriers separating those who have made the switch from those furthest away.

1 A multivariate regression model with the following variables included was run on this wave's general population data: age, gender, ethnicity, disability status, education level, rurality, household income, housing tenure, self-reported financial security and property type.

Where drivers stand on switching to electric: Understanding the EV transition ladder

The transition to electric is not a single leap and openness to choosing an EV is unlikely to change overnight.

Based on willingness to consider an EV, our research identifies six groups at different stages of the transition – from existing EV owners through to those firmly resistant to making the switch.

Understanding where people sit on this ladder matters, but understanding what separates them tells us much more about what could help improve their ability to actually make the switch.



Existing EV Owners

5 **% British public**

13 **% Motability Scheme customers**

- **Higher earners** – 25 per cent have a household income in excess of £125,000.
- **Driveway** – 86 per cent have a driveway or garage.

Existing EV owners make up around five per cent of the wider population and are typically younger, male, urban and higher income, with greater access to off-street parking. Among Motability Scheme customers, 13 per cent already drive an EV, but income and urban living are less significant. Instead, access to home charging and off-road parking appears to be a key factor in whether disabled drivers can make the switch.

Likely First-Time EV Purchasers

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- **Millennial** – 35 per cent are aged 25-34.
- **Parents** – 44 per cent have a child aged under 16.
- **Urban** – 34 per cent live in urban/city centres.

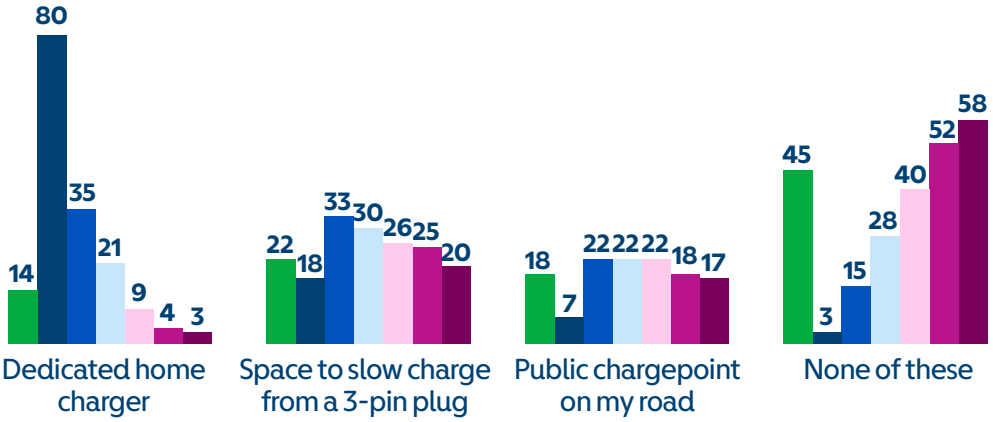
Likely first-time EV purchasers make up around nine per cent of the wider population. They expect their next vehicle will be an EV. They are typically younger, male, urban and financially comfortable, with access to private parking. Just four per cent of Scheme customers fall into this group, where home charging, rather than urban living, is again a key distinguishing factor.

EV owners and considerers are much more likely to have access to EV charging facilities

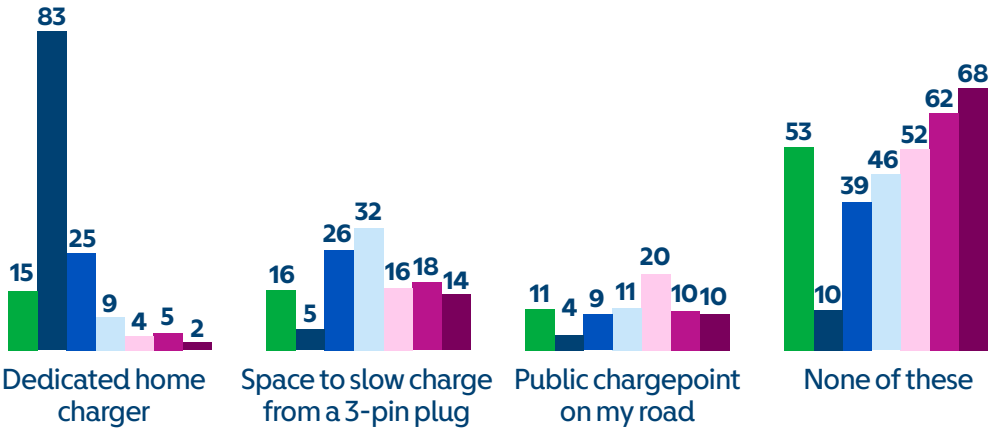
Facilities each EV audience group has to charge an electric vehicle at or near their home

- All
- Existing Owners
- Likely Purchasers
- Considerers
- Undecideds
- Soft Resisters
- Firm Resisters

% British public



% Motability Scheme customers



* Dedicated home charger: a dedicated EV charger for a vehicle parked on the property (e.g. garage, driveway, front garden) or just off it (e.g. an over-pavement option).

Base: All adults & All Motability Scheme customers.

EV Considerers





- **Youngest group** – A fifth are aged 18-24.
- **Off-street Parking** – Most likely group to have on-road parking available.

EV considerers make up 19 per cent of the wider population. They currently expect their next vehicle to be petrol, diesel or hybrid but remain open to electric, and tend to be younger, male, urban and on middle-to-higher incomes.

12 per cent of Scheme customers are EV Considerers and they are broadly representative of the wider customer base. What sets them apart is access to charging: they are twice as likely as Scheme customers overall to have space at home where a chargepoint could be installed, suggesting that a realistic route to home charging can make an EV feel like a viable option.



EV Undecideds

11 % British public

11 % Motability Scheme customers

- **Towns** – Most likely group to live in a town.
- **Female** – Group most likely to be female.

The Undecideds have not ruled out an EV but are unsure whether they would consider one for their next vehicle. They represent around 11 per cent of the wider population and are more likely to be female and live in small towns.

11 per cent of Scheme customers also fall into this group. They are less likely than Existing EV Owners, Likely First-Time EV Purchasers and EV Considerers to be able to charge at home, although they have access to on-street charging in line with the rest of the population.

Unlike the wider public, there is no clear gender or rurality skew among Undecided Scheme customers.

Soft EV Resisters

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- **Oldest** – The oldest group – 37 per cent are aged 65+.
- **Rural** – Most rural group.
- **Petrol** – Most likely group to own petrol vehicles.

Soft Resisters are not currently considering an EV, although electric is not the vehicle type they are least likely to buy. They represent around eight per cent of the wider population and are more likely to be older, own a petrol vehicle and live in a rural area.

Around ten per cent of Scheme customers are Soft Resisters. They are also the oldest Scheme customer group and are more likely to be female. Despite having similar levels of off-street parking to Scheme customers overall, they are much less likely to have access to home charging.



Firm EV Resisters

16

29

- **Diesel** – Most likely group to own diesel vehicles.
- **Chargeless** – The group least likely to have the ability to charge at home/on their road.

Firm Resisters are unwilling to consider an EV and rank electric as the vehicle type they are least likely to buy. They represent around 16 per cent of the wider population. Among the wider public, they are more likely to be older, own a diesel vehicle, live in a village or small town and have little direct experience of EVs.

"I think for us it would be charging. I would like at-home charging, but living on a first floor flat, I think it's going to be completely impossible to do that."

Zainab, Motability Scheme customer, Glasgow

A much larger proportion of Scheme customers (29 per cent) are Firm Resisters. But unlike the wider public, there are fewer demographic characteristics that clearly distinguish them.

They are much more likely to have no way to charge at home, less likely to have off-street parking and are less confident that they could physically use a public chargepoint.

More than half (52 per cent) say they would not be confident they could physically use one, compared with 42 per cent of other Scheme customers.

Clearly, the factors shaping the path towards electric vary significantly among the two groups. For the wider public, financial circumstances and perception of EV costs help explain where people sit on the transition ladder. For disabled drivers, access to charging emerges as a much clearer dividing line.

Helping people up the transition ladder

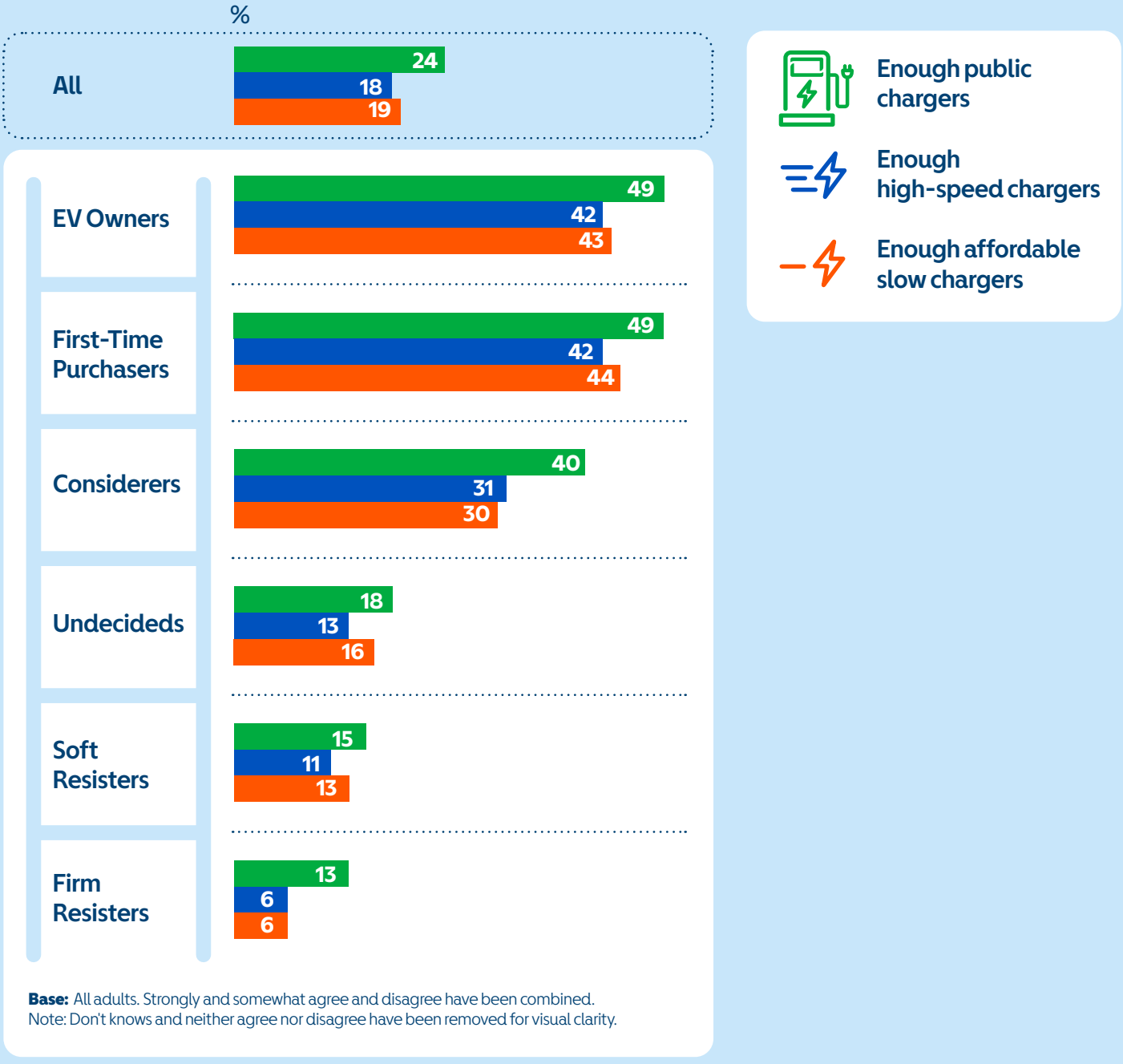
Reviewing the groups across the transition ladder reinforces just how closely access to charging is connected with willingness to make the switch.

Among current EV owners, 89 per cent have some form of at-home charging capability, as do 61 per cent of likely first-time EV purchasers. That falls to 29 per cent of Soft Resisters and just 23 per cent of Firm Resisters.

The same pattern can be seen in perceptions of the local charging network. 49 per cent of both current EV owners and Likely First-Time Purchasers agree there are enough public chargers in their local area, compared with just 13 per cent of Firm Resisters.

Confidence in local public chargers is associated with intention to buy an EV

Percentage who agree – strongly or tend to – with each statement about charging in their local area.



Base: All adults. Strongly and somewhat agree and disagree have been combined.
Note: Don't knows and neither agree nor disagree have been removed for visual clarity.



The importance of accessible charging

For disabled drivers, availability of EV chargepoints is only one part of the equation.

Our Glasgow focus group highlighted significant concerns among disabled customers about whether they would physically be able to charge an EV. Customers spoke about reaching chargepoints, manoeuvring around charging bays and having sufficient strength to handle charging cables.

"If you're in a wheelchair or you've got accessibility issues, how are you meant to reach the charger? I've got carpal tunnel, and I'll be honest with you, I've got probably about 40 per cent of the strength left in my hands right now. So even opening up a hot water bottle or something like that is difficult."

Zainab, Motability Scheme customer, Glasgow

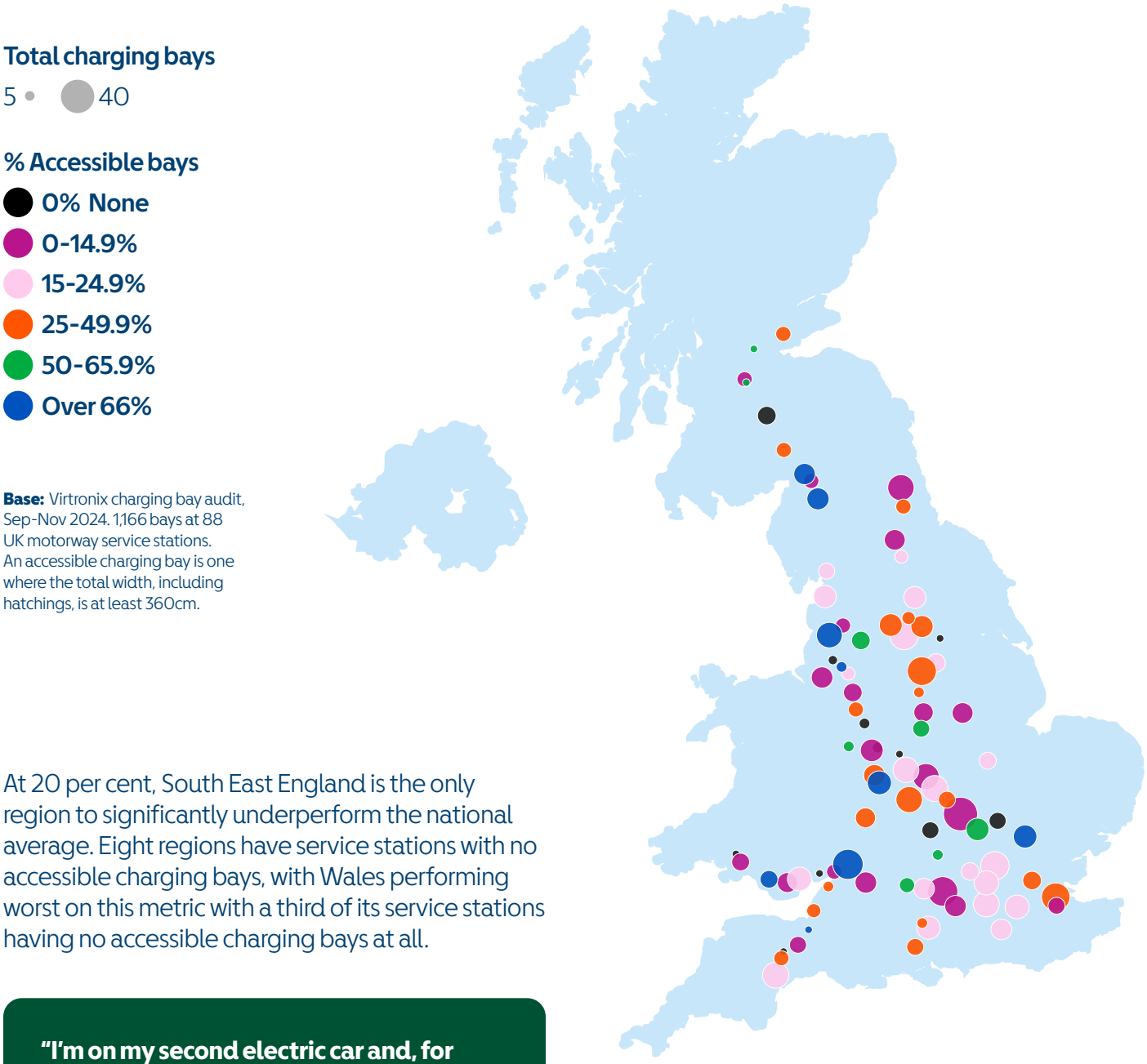
Evidence from Britain's motorway network reinforces those concerns. Analysis by Motability Operations and independent surveyors found that only around three in ten (29 per cent) charging bays at motorway service stations meet the minimum total width of 360cm, including hatching, required for a chargepoint to be considered accessible under British standards.

Indeed, across Great Britain there are at least 11 service stations with EV chargepoints where none of the bays are large enough to be considered accessible – this represents one in eight of the country's service stations.

A shortage of accessible chargepoints is a challenge for motorway drivers across all regions with only the East of England (43 per cent) and North West England (40 per cent) significantly outperforming the national average for accessible charging bays.

One in eight motorway service stations we measured have no accessible charging bays

Share of electric vehicle charging bays at least 360cm wide, including hatchings, by service station



Base: Virtronix charging bay audit, Sep-Nov 2024. 1,166 bays at 88 UK motorway service stations. An accessible charging bay is one where the total width, including hatchings, is at least 360cm.

At 20 per cent, South East England is the only region to significantly underperform the national average. Eight regions have service stations with no accessible charging bays, with Wales performing worst on this metric with a third of its service stations having no accessible charging bays at all.

"I'm on my second electric car and, for most of my day-to-day driving, having a home charger makes it really easy. The challenge comes when I'm travelling further and need to use motorway charging. As an amputee, I need enough room to open the car door properly and get my leg out. Some charging sites have wider bays, but there aren't enough and you can't guarantee they'll be available when you arrive. I plan my longer journeys meticulously, but you can still get to a service station and find the wider bays occupied by smaller vehicles."

Michele, Motability Scheme customer, London

Trusted messengers can help move people up the transition ladder

Previous waves of the Tracker have shown that exposure to EVs – either directly or through friends and family – can increase people's willingness to consider making the switch.

This wave shows that people also place greater trust in voices they believe can provide practical, impartial advice.

Across both the UK and Scotland, local mechanics, existing EV drivers, Martin Lewis and Which? journalists emerge as particularly trusted and knowledgeable sources of information about EVs.

As the availability of petrol and diesel vehicles declines, this support and communication will need to reflect where people are on the transition ladder.

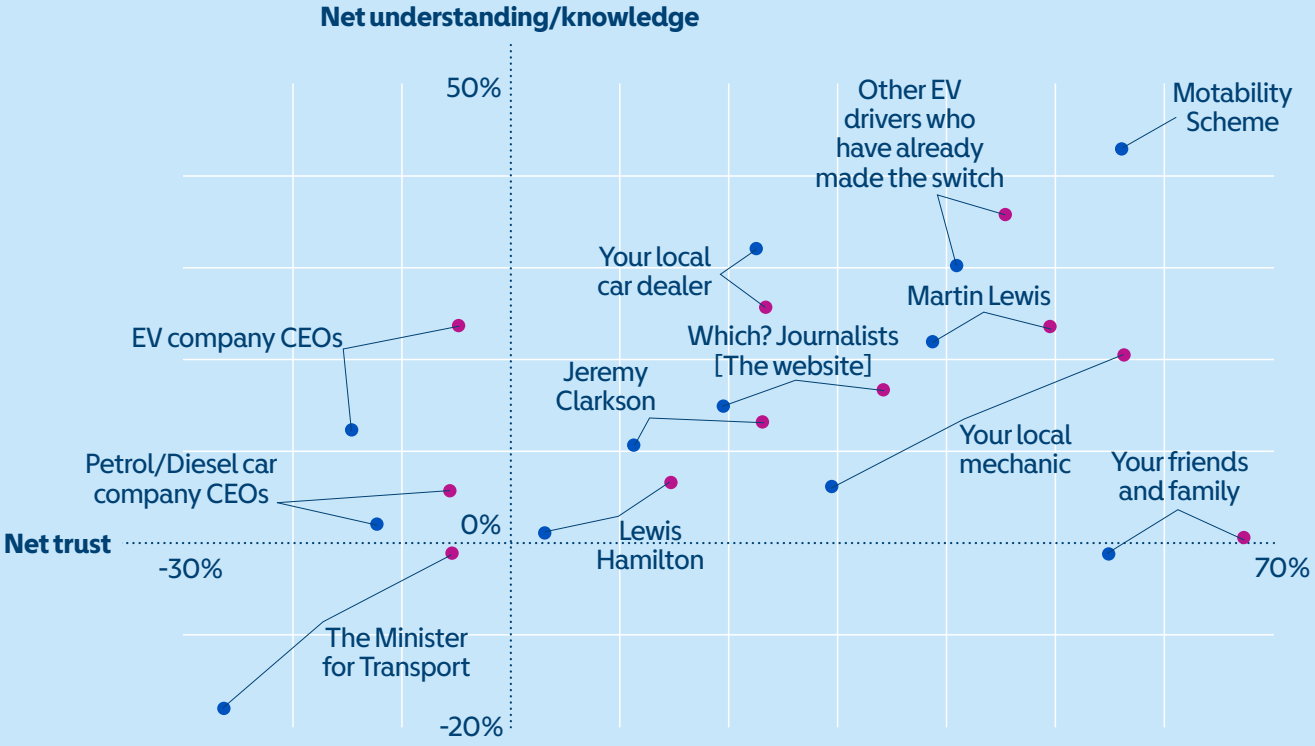
For those ready to switch, trusted information can build confidence and help them make an informed choice. For others, where the barriers are practical, the solutions must be too.

British public

Future EV buyers trust Martin Lewis, their local mechanic and other drivers who have already made the switch to talk about the pros and cons.

Motability Scheme customers

The Motability scheme is the most trusted communicator for Motability customers.



Knowledge: For each person or type of person below, please indicate the extent you think they have the knowledge and technical expertise to understand the advantages and disadvantages of purchasing an electric vehicle for someone like you? **Trust:** For the same list of people, please indicate the extent to which you would trust them to be honest about the advantages and disadvantages of making the switch to an electric vehicle.

Base: Only those with a driving license who intend to buy a vehicle in the next ten years.

Turning insight into action

The EV Transition Tracker is designed to understand how people feel about electric vehicles, but also identify what is holding them back and what will help ensure people aren't left behind as the 2030 phase out approaches.

The findings point to different solutions for different barriers – from building confidence and understanding around the financial benefits of driving electric, to removing the practical obstacles that can make switching difficult or impossible for disabled drivers.

Help people understand whether electric works for them

For the wider public, clear, trusted information can help them understand whether electric makes financial sense for their individual circumstances.

The Motability Scheme's EV Cost Calculator helps customers compare the running costs of electric, petrol and diesel vehicles based on how they drive, where they charge and their energy tariff.

More broadly, drivers need credible information that helps them understand the real costs and practicalities of EV ownership. The Tracker shows the importance of trusted voices – including local mechanics, existing EV drivers, Martin Lewis and Which? journalists – in helping people make informed choices.

Give drivers confidence in the charging network

For those considering an EV, confidence that they can find suitable charging when they need it is essential.

The Motability Scheme's EV Journey Planner helps customers find chargepoints and plan journeys across the UK. Through the Go app, customers can also check live availability, view accessibility information and see reviews from other Motability Scheme customers – helping them identify chargepoints that meet their needs before they travel.

Unlock home charging for people without driveways

For many disabled drivers, the bigger challenge starts before they leave home. Without off-street parking, they may have no convenient or affordable way to charge an EV.

That's why we are testing cross-pavement charging solutions with customers, manufacturers and local authorities to understand what works and what needs to change.

The next step is scale. Cross-pavement products need to be designed so disabled people can use them, with simpler and faster installation processes so more people without driveways can benefit from home charging.

Build accessibility into the transition from the start

Finding a chargepoint does not mean a disabled driver will be able to use it. Bay width, cable weight, reach, kerbs and the wider charging environment can all make public charging inaccessible.

This highlights the importance of ensuring charging infrastructure is designed to be accessible from the outset and meets recognised accessibility criteria, such as the PAS 1899 standard, co-developed by the Motability Foundation with the UK Government and British Standards Institution. PAS 1899 is currently being updated following a formal review, with a revised edition expected in 2027. The update aims to ensure the standard continues to reflect emerging evidence, user experience and developments in charging infrastructure.

Conclusion

The findings from our research show that progress is possible. Attitudes can change, confidence can grow and more people can move towards considering an EV for their next vehicle.

But there is no single route to getting there. For the wider public, financial circumstances and perceptions of EV costs continue to shape whether electric feels like a realistic choice. Clear, trusted information can help people understand what switching would mean for them.

For disabled drivers, the challenge is often more practical. Access to home charging and confidence that public chargepoints will be accessible and physically usable can determine whether making the switch is possible at all.

That distinction needs to shape what happens next. The UK needs more charging infrastructure, but numbers alone are not enough. Drivers without driveways need realistic routes to home charging, and accessibility needs to be built into the public network as it expands.

The transition to electric cannot leave disabled people with less choice, freedom or independence. If we address these barriers, we can make sure the move to electric works for everyone.



Methodology

Quantitative

UK public survey

A nationally representative sample of 3,166 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, 2024 General Election vote, ethnicity and education level. Fieldwork for this survey took place between 21 and 29 July 2026.

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 2,021 Motability Scheme customers aged 18+. Fieldwork was conducted between 22 July and 3 August 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.

Scottish public survey

A representative sample of 1,011 respondents from across Scotland were interviewed by More in Common for this survey. Respondents were weighted to be representative of the Scottish public according to gender and age interlocked, 2024 General Election vote, ethnicity and education level. Fieldwork for this survey took place between 22 July and 4 August 2026.

Motability Scheme customers in Scotland survey

A survey of a sample of Motability Scheme customers in Scotland was fielded. Current Motability Scheme customers in Scotland were invited via email to take part in the survey, which was conducted online. More in Common interviewed a sample of 1,083 Motability Scheme customers in Scotland aged 18+. Fieldwork was conducted between 24 July and 4 August 2026. The invitation sample was drawn to ensure the proportions in the sample matched those of the Motability fleet breakdown in Scotland in terms of vehicle fuel type, age group and gender. The data has been weighted to be representative of Motability Scheme customers in Scotland according to age 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 eight participants, all from Glasgow, was moderated by More in Common on 13 August 2026. Participants were recruited to the focus group according to the following criteria:

- Mixture of genders and ages
- All to say they intend to buy a new vehicle within the next five years
- All to say they would probably consider, are undecided, or would probably not consider making that purchase an EV
- All to not have an off-street private driveway
- All to not currently own an EV in their household
- Two to be Motability Scheme customers.





Connect with the Motability Scheme

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