Motability Scheme

Ipsos

MOTABILITY.CO.UK

June 2025

# EV Transition Tracker

# The data behind this report

## This report draws on three survey sources:

### UK public survey

For the first wave of the Tracker, Ipsos UK interviewed a representative sample of 2,214 online UK adults aged 18-75. Polling was conducted between 17 and 22 April 2025. Data is weighted to match the profile of the population. All polls are subject to a wide range of potential sources of error.

Full data tables are available from the Ipsos website.

### Headlight Community survey

Supporting data is also taken from a survey of members of an online community platform of Motability Scheme customers. This is an opt-in community of more engaged Scheme customers who give their views and feedback on a wide range of Motability Scheme initiatives.

The survey is a subsection of this community audience (1,274 of 6,174 panel members) and ran between 30 April and 6 May 2025. Data from it is presented unweighted and should be interpreted only as a reflection of the views of some Motability Scheme customers, rather than representing the wider customer base.

### Motability Scheme customer survey

Additional supporting data points are drawn from a census survey of Motability Scheme customers. This survey is sent by email on a rolling basis to all Motability Scheme customers who lease a car or Wheelchair Accessible Vehicle (WAV) four months before the end of their lease. This means it captures in-the-moment views of customers who are thinking about their next vehicle lease.

The data referenced in this document is an extract of all responses to the survey during the month of April 2025. During this time 7,907 survey invitations were sent and 1,905 were completed (an unadjusted response rate of 24%). It is presented unweighted and should be interpreted only as a reflection of the views of some Motability Scheme customers, rather than representing the wider customer base.



# Foreword

## Welcome to the EV Transition Tracker

The Motability Scheme connects disabled people to life-changing freedom and independence. In exchange for their eligible mobility allowance from government, our customers choose a vehicle to lease for three years as part of an all-inclusive package. Research by Oxford Economics[1] shows this cuts journey times, improves access to education or training, and enables people to work more.

When the Scheme was established, it addressed a motor market that didn't meet the needs of disabled people. Inaccessible designs, unaffordable costs and a lack of tailored support left many disabled people excluded from independent travel.

As the UK undergoes a significant change in the transition to electric vehicles (EVs), our focus is on safeguarding the positive impact of the Scheme for our disabled customers, taxpayers and the UK economy.

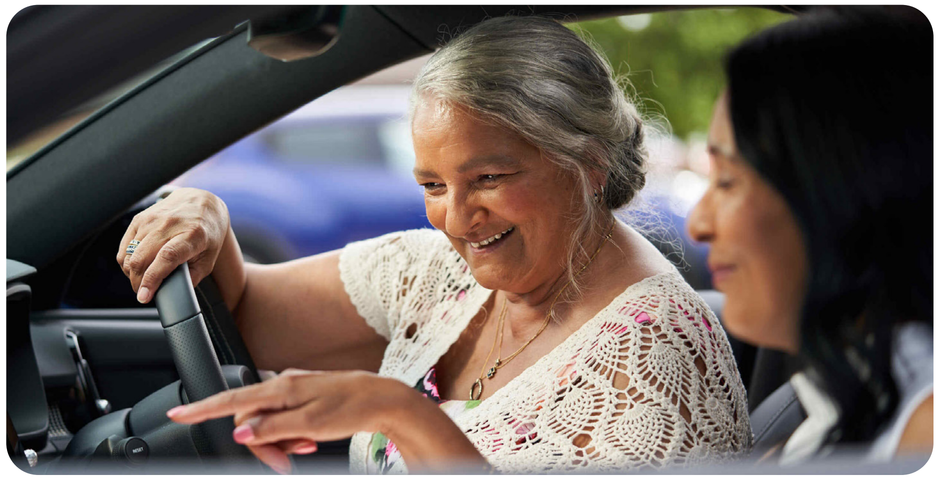
The UK car market is approaching a moment of tension as electric replaces traditional internal combustion engine (ICE) vehicles. We expect that most new cars available in two years' time will be electric and there will be no petrol or diesel cars by 2030. Understanding the experiences and concerns of drivers is critical, not only to support disabled drivers who rely on the Motability Scheme but also to inform wider public policy and industry practice.

These findings can help create a smoother transition by better understanding the barriers to adoption. Disabled people cannot be left behind as the UK car market changes.

And if we can make the transition work for our customers, it can work for everyone.

**Andrew Miller**
CEO, Motability Operations

**Nigel Fletcher**
CEO, Motability Foundation



[1] https://www.motabilityfoundation.org.uk/media/a2gf14ys/oe-report-2021.pdf

# Are we nearly there yet? A long road ahead for the UK's EV transition

The UK car market is approaching a moment of tension. It is projected that by 2028, sales of EVs will exceed those of petrol vehicles in the UK,[2] yet while 53% of UK car owners tell us they plan to replace their car between now and then, only one quarter (24%) expect this replacement will be an EV.

Put alongside the fact that 46% of the public are nervous about the shift to EVs, this outlines a clear challenge in preparing the expectations for the public, and our customers, for a significant supply-side shift. This first wave of the EV Transition Tracker outlines the scale of the challenge, as well as the obstacles and enablers that could speed the public on its way towards a smooth EV future. You can explore the full data and insights in the pages ahead.

### UK attitudes towards EVs are divided

- Overall, more people are positive about EVs (40%) than negative (29%).
- Opinions of EVs are more positive among younger adults, wealthier households and in London.
- However, 45% of UK adults say they won't switch until they have no choice.

### Barriers may be more significant for Motability Scheme customers

- Data from an online community of our customers suggests that positivity towards EVs matches the national picture. Yet just 17% of Scheme customers coming towards the end of their lease are considering an EV.
- Accessibility of public charging can be one of the key barriers, with only 52% who have public charging experience surveyed through the Headlight Community saying they found the process to be easy.
- Scheme customers on the Headlight Community are notably positive about hybrid vehicles and are as likely to say they would consider one for their next vehicle as they would a petrol-engine car.

### EVs feel unfamiliar to most, but many could be persuaded

- EVs are commonly seen as luxurious and high-tech vehicles, while petrol and diesel cars are more likely to be considered familiar and good value for money.
- But few have strong views; only 22% say they definitely would consider an EV for their next vehicle and 19% say they definitely would not. Fifty-eight per cent fall in the middle.

[2]https://www.coxautoinc.eu/news-insights/from-sales-to-sentiment-understanding-the-ev-market-in-2025-insight-quarterly



## Opportunities ahead?

### From range anxiety to charge anxiety? Improvements needed in public charging infrastructure

- EV range is still an important factor dissuading people from switching. This is also true based on our survey of disabled Scheme members through the Headlight Community.
- It may be better to address this concern by focussing on making public charging more accessible. Almost half (45%) of the public agree that public chargers are often unavailable and 40% say they are difficult to find. Forty per cent of EV drivers say chargers are often faulty.

### Exposure builds favourability and experience changes minds

- The UK public data suggests that the more people are exposed to EVs, the more they like them. Three quarters (77%) of car buyers with any charging experience say they would consider an EV for their next vehicle, compared with 33% of those with no experience. Similarly, among Motability Scheme customers coming towards the end of their lease in April, 78% of current EV drivers said they were likely to consider another EV next, compared with just 17% of all customers.
- With 58% of future car buyers more open-minded as to whether their next car will be an EV, this suggests an opportunity to shift sentiment is exposure is increased.
- Experience with hybrids may be another stepping stone to EVs. Sixty-four per cent of hybrid drivers looking to buy a new vehicle say they would consider an EV, well above the UK average of 44%.

# Public sentiment split on EVs as almost half won't switch until they have to

### EVs evoke mixed and strong opinions

Nearly half (45%) of the UK public say they will not change to an EV until they have to, a sentiment which is higher among older people, as well as those living in rural areas and on lower incomes. Yet the largest proportion of the public, 40%, tell us that they have a positive opinion of EVs while 29% have a negative view. This puts EVs behind petrol-powered and hybrid vehicles, but ahead of diesel cars in current public opinion.

However, those who have already made the switch show few signs of regret – 86% of those who drive an EV as their main vehicle are positive about them.

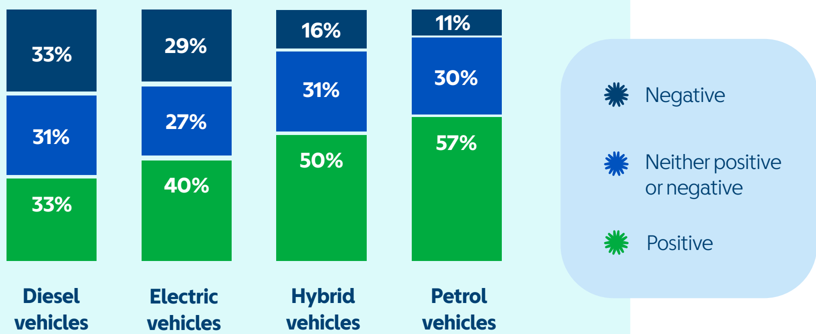
### A similar picture for EV consideration

This pattern holds when we focus on future car purchasers: 44% of UK adults who say they will buy a car in future say they would definitely, or probably, consider buying an EV. This is behind the two-thirds (66%) who say they would consider a petrol car and 56% who would think about a hybrid, but is ahead of the 35% who would contemplate a diesel.

Again, EV drivers are far more positive, with 91% of those looking for a new car saying they are likely to consider another EV for their next vehicle. Hybrid vehicles appear to be a bridge to EVs too, with 64% of current hybrid drivers looking for a new car saying they would consider an EV.

With five years to go until the planned end of sales for new ICE vehicles, public positivity towards EVs remains far behind petrol. There is still a great distance to cover in improving public perceptions and interest in purchasing EVs if we are to avoid a "cliff edge" transition in 2030.

To what extent, if at all, would you say you have a positive or negative opinion overall of...




**Base:** 2,241 UK adults aged 18-75, interviewed online 17th – 22nd April 2025



# An unbalanced transition led from London

**These mixed headline figures are built on significant differences between people by age, location, income, with those in groups that more closely match the make-up of Motability Scheme customers tending to be less positive about EVs.**

### Age, income and region are significant factors

- Younger people are more positive: 62% of 18–34-year-olds have a positive opinion of EVs, compared with just 25% of those aged 55-75.
- There is greater positivity among richer households too: 57% of those living in households earning more than £55,000 a year are positive towards EVs, and 60% of future car buyers in this bracket would consider buying one. It is lowest among those on household incomes of £20,000 or less.

### The 'EV moat' around London

A map of regional interest in purchasing an EV reveals a vastly divergent landscape of consideration. In London, almost three-quarters (72%) of drivers who plan to buy a car in the future say they would consider an EV. Just a third (33%) in Northern Ireland say the same.

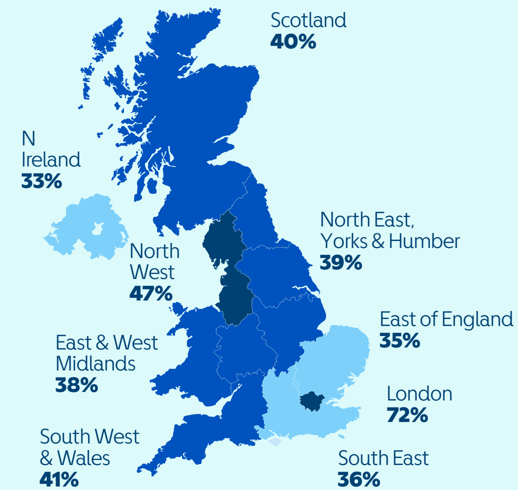
But the two English regions where consideration is lowest are those which surround London: the South East and East of England. This makes London an island, in a moat of comparative negativity towards EVs.

This speaks to an underlying urban-rural split in attitudes towards EVs. While 47% in all UK urban areas would consider an EV for their next vehicle, it is just 31% for those in rural locations. And 57% of rural dwellers are nervous about the EV transition, well ahead of the 45% of those living in urban areas.

This data suggests that the EV transition could stall in future, unless action is taken to improve EV perceptions among older drivers and those on lower incomes, as well as driver in areas outside of London and larger cities.

Thinking about the next car or van you will buy or lease... to what extent would you or would you not consider buying a fully electric vehicle?

% Definitely/probably would consider

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# Transition tensions for disabled customers

### Mixed feelings about EVs, but excitement for hybrids

Overall, the view from Motability Scheme's customers towards EVs appears to match the UK public, with 41% who responded to a survey among our opt-in Headlight Community feeling positive towards them.

While 40% of this community also told us they would consider an EV for their next vehicle, this does not yet appear to be translating into purchase behaviour. In a rolling survey of all Scheme customers towards the end of their lease, only 17% said they would consider an EV for their next lease.

Hybrid vehicles may be able to play a role in bridging this divide. A survey of members of the Headlight Community found that they view hybrid vehicles as positively as they do petrol vehicles (59% and 62% respectively). We know from the public data that experience of hybrid driving is linked to a more positive view of electric vehicles, and a higher likelihood of considering buying one in the future too.

### What do UK divides across age, income and location mean for our customers?

Disabled customers of the Motability Scheme tend to fall into demographic groups which our public survey suggests are associated with a more negative view of EVs, underlining their need for support in making the switch:

- The average age of our customers is 52; among those aged 45-54 in the UK survey, only a third have a positive view of EVs (34%) compared with 40% overall.
- The median household income of a Scheme customer is £18,400 - this is just over half of the UK median household income.[3] In the UK data, just 35% of those with household incomes under £20,000 have a positive view of EVs.
- While Scheme customers are spread across the UK, 81% of customers live in rural or suburban areas – and we know that just 30% of those in rural areas in the UK survey are positive about EVs.

Our customers are unlike typical early adopters who, the data suggests, are younger, wealthier and live in urban areas. The tensions we see in our data suggests that like much of the UK public, there is work to do in improving their perceptions to make EVs a natural and suitable choice for their next vehicle.

[3]https://www.ons.gov.uk/peoplepopulationandcommunity/personalandhouseholdfinances/incomeandwealth/bulletins/householddisposableincomeandinequality/financialyearending2024



# Accessibility is a significant barrier

### Charging accessibility is a crucial factor for disabled people

Accessible charging is an important part of the transition. Among the disabled drivers surveyed as part of our Headlight Community, 95% who had experience of charging at home said that they found the process easy.

But not all disabled people can charge from home. Our internal customer analysis suggests that around half of our customers will not be able to charge from home because they do not have a driveway, or will be unable to get permission to have a chargepoint installed.

Views of the public charging network are more mixed. Just over half (52%) in our survey of Headlight Community members who had experience of charging at a public location such as a supermarket of motorway service station felt it was easy (52%) and three in ten (30%) said it was difficult. Almost half (45%) agree it is difficult to locate nearby charging points, while 60% agreed that charge points are often unavailable because they are in use by others.

This suggests there are additional accessibility challenges for disabled customers accessing the public charging network the UK. Taking steps to address these issues must be a key priority if we are to support thousands in making a smooth transition into EVs.

### Addressing accessibility

Over 1,000 Motability Scheme customers participated in a test programme reviewing UK public charging infrastructure. Through an app - which helps our customers find chargepoints, manage and pay for charging – they were able to review and flag accessibility and other issues, providing valuable information.[4,5]

**"I had to reverse in to the bay as the short cable would not have reached if I drove in. Once in the bay, I could not open the tailgate to access my wheelchair. Charging bays are placed on the far side of the car park so I had to sit in car while it charged."**

- Motability Scheme customer in the trial.

[4]https://www.motability.co.uk/whats-available/electric-cars/charging/go-charge/
[5]https://www.motabilityfoundation.org.uk/impact-and-innovation/innovation/accessible-electric-vehicle-charging/

# Are EVs for "people like me"?

### Among the UK public, EVs project an elite, high-tech image

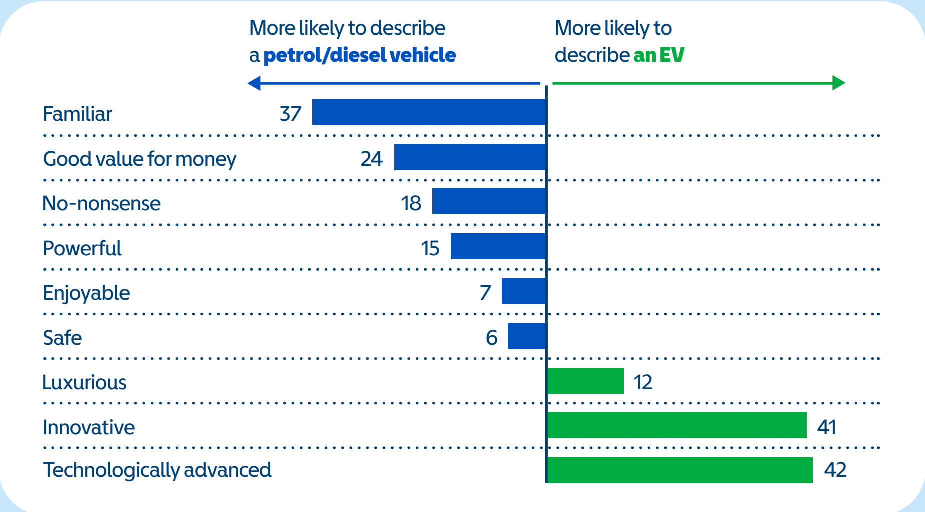
Our data suggests that the differences we see in EV positivity and consideration are linked to the perception that EVs are less familiar and worse value for money than ICE cars.

When asked whether a suite of words better describes ICEs or EVs, the key words that were associated with EVs were "technologically advanced" and "innovative". For "technologically advanced", 51% of the UK public said it better described EVs, while just nine percent said it described ICEs. Subtracting one from the other results in a net score of 42. A third word more likely to be associated with EVs was "luxurious", with a net score of 12.

While these are positive traits, the words associated with ICEs are closer to what a lot of people in the UK are looking for in a vehicle: "familiar", "good value for money" and "no-nonsense". We know from this survey that the top three factors that are important to UK car buyers are reliability, on-going running costs and the up-front cost.

The power of experience is also clear in the data. EV drivers think all nine terms better describe EVs than ICEs, while hybrid drivers are also more likely to say that "good value for money" and "no-nonsense" better describes EVs. This reinforces the clear role exposure to EVs can play in building the confidence to make the switch from petrol to electric.

Based on what you have seen or heard, which of the following would you say better describe fully electric vehicles, better describe those with engines powered by either petrol or diesel fuel, or describe both equally? Net score (% selecting EVs, subtract % selecting ICEs)




**Base:**
2,241 UK adults aged 18-75, interviewed online 17th – 22nd April 2025

# But many could be persuaded to switch as 58% sit on the fence

### The next step in EV adoption may be convincing the "tentative transitioners"

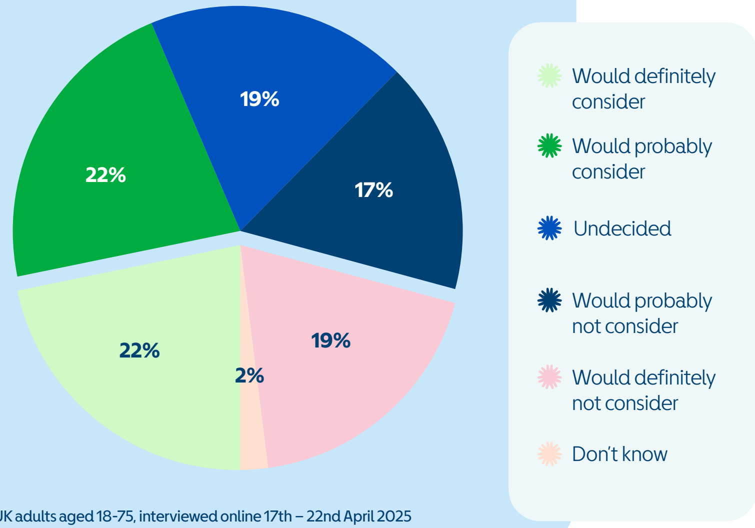
Only 41% of car buyers have set opinions on EVs: 19% told us they would "definitely not" consider one for their next car, while a similar number (22%) said they "definitely would".

This leaves 58% persuadable either way. And at the centre are the tentative transitioners, who comprise 19% of all UK car buyers and are completely undecided on whether they would consider an EV for their next vehicle. We find a similar number of tentative transitioners among Motability Scheme customers. In a rolling survey of all Scheme customers reaching the final four months of their current lease agreement in April, 18% are undecided.

Tentative transitioners are more likely to be found at the younger end of the age distribution, including 26% of 18–24-year-olds, as well as slightly more (21%) of the 55-75s. They are also more likely to be from lower income groups, suggesting there may be more overlap with our customers.

Among tentative transitioners it is all to play for: while just 27% have a positive opinion of EVs, only 14% are negative. More than half (56%) do not yet have a firm opinion, but nearly half (46%) are nervous about the switch to EVs. As this group are also less likely to be looking to buy a car in the next year, there is time to reach them and improve their perception of EVs – helping to smooth the transition ahead of the 2030 ban on the sale of new petrol and diesel vehicles.

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




**Base:**
2,241 UK adults aged 18-75, interviewed online 17th – 22nd April 2025

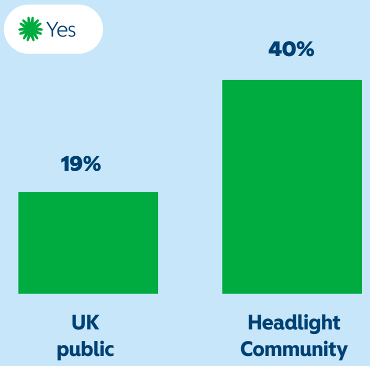
# Charging experience generates positivity

### Experience of charging is wider than EV ownership

Experience with charging can form part of the effort to help people switch. It is already more widespread than EV ownership, with a fifth (19%) of UK adults saying they have charged an EV or plug-in hybrid in the past. This is much higher than the proportion who use one as their main vehicle (5%) or currently drive one (9%). But charging experience is lower among those groups who are less positive about the transition generally: for instance, 89% of 55–75-year-olds reported no experience with charging, alongside 88% on household incomes under £20,000 a year.

This pattern is also found within our customers: 28% of people surveyed through our Headlight Community own an EV, but 40% have charging experience.

Regardless of whether you own or drive one, have you ever charged an electric or plug-in hybrid vehicle in the past?




**Base:**
Public: 2,241 UK adults aged 18-75, interviewed online 17th – 22nd April 2025
Headlight Community: 1,247 Community members aged 18+, interviewed 30th April - 6th May 2025

### Public and private charging is equally common

Charging experiences are spread across public and private types of charging. Among those with charging experience, 52% say they have charged in a public location like a supermarket car park or motorway service station, and 48% have charged at home. Around a third (35%) have charged at work, and a quarter (25%) from an on-street charging point. Encouragingly, across all main types of charging, at least 80% of users report finding the process to be easy, ranging from 92% for at-home charging to 80% for charging in a supermarket or public place.

### Charging positivity

Those with experience of charging report much higher levels of positivity and interest than the wider public: three-quarters (74%) of those who have ever charged an EV or hybrid say they have a positive view of EVs and 77% of future car buyers with charging experience say they would consider getting an EV as their next car, compared with 40% of the wider public having a positive view of EVs, and 44% saying they would consider one. The challenge is to extend this experience to lower income and older groups who comprise a greater proportion of the overall UK car market, as well as our customers.



# But public charge anxiety is a major roadblock

### The perception that public charging points are often unavailable and difficult to find is relatively widespread

Concern about EV range is significant. Just one quarter (28%) of the UK public say they are not worried about the distance EVs can travel on a single charge, while 44% disagree. Disagreement among Motability Scheme customers in our Headlight Community is higher still, on 69%.

But underneath this concern our data suggests a level of nervousness and a sense of a lack of information about EV charging, especially in public locations. It may be more accurate to talk about "charge anxiety", rather than "range anxiety".

Almost half of the UK public (46%) agree that the public charging points found in supermarkets and at motorway service stations are often unavailable. Forty percent say that it is difficult to locate the nearest charging points. And one quarter (25%) agree that charging points are often damaged or not working.

These perceptions are powerfully embedded:

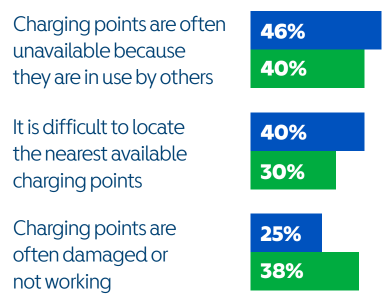
- They do not vary by availability of chargepoints. Despite London having almost twice as many public charging devices per 100,000 people than any other UK region,[6] Londoners are just as likely as the rest of the country to feel that public charge points are often unavailable (40%).
- Negative perceptions also do not reduce significantly with experience: even among EV owners, 40% feel public chargepoints are often unavailable, 30% agree it is difficult to locate them, and 38% - far more than the wider public – say the points are often damaged or not working.

Our customer data appears to reinforce some of these themes. Headlight Community members are as likely to disagree as they are to agree that public chargepoints are easy to use. This may be driven by accessibility issues, reinforcinng the importance of ensuring charging infrastructure meets accessibility criteria, such as the PAS 1899 standard that the Motability Foundation has co-developed with the UK Government and British Standards Institute.[7] This will help ensure that thousands are not left behind as the UK makes the transition to electric vehicles.

Thinking now about charging electric vehicles in public locations, for instance at supermarkets and motorway service stations, as well as on-street facilities...

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

% agree- public   % agree- EV drivers




**Base:**
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[6] https://www.gov.uk/government/statistics/electric-vehicle-public-charging-infrastructure-statistics-january-2025/electric-vehicle-public-charging-infrastructure-statistics-january-2025
[7] https://www.motabilityfoundation.org.uk/impact-and-innovation/innovation/accessible-electric-vehicle-charging/

# How do we build future familiarity?

EVs are still a new technology that appeals mostly to early adopters.

As with other new technologies, EVs may be accelerating towards the "chasm" between appealing to these pioneers and attracting the wider population.[8] What lessons are there from this wave of the EV Transition Tracker to help create a smooth transition for all UK drivers, including our customers?

## 1 Building familiarity, to breed favourability

The key takeout from much of the Tracker is that every touchpoint with EVs is correlated with improving perceptions. The less experience people have with EVs, the less positive they feel, and the less likely they are to consider purchasing one in future. Those with more experience are less nervous and more excited about the transition.

To this end, we offer our customers Test Drive and Test Charge initiatives to help build their EV experience and determine whether electric could work for them now.

## 2 Improving accessibility

Changing the image of EVs from being high-end and exclusive to a choice for everyone would help more people in the UK make the transition. This is not only about reducing cost and improving perception, but also ensuring that charging infrastructure is seen as being easily available and easy to use for people from all walks of life.

We have seen that tools like our Go Charge App, which provides as much information as possible about the network, can help ease anxiety over public charge points, which may be blocking some people from considering an EV.

## 3 Building excitement and overcoming nervousness

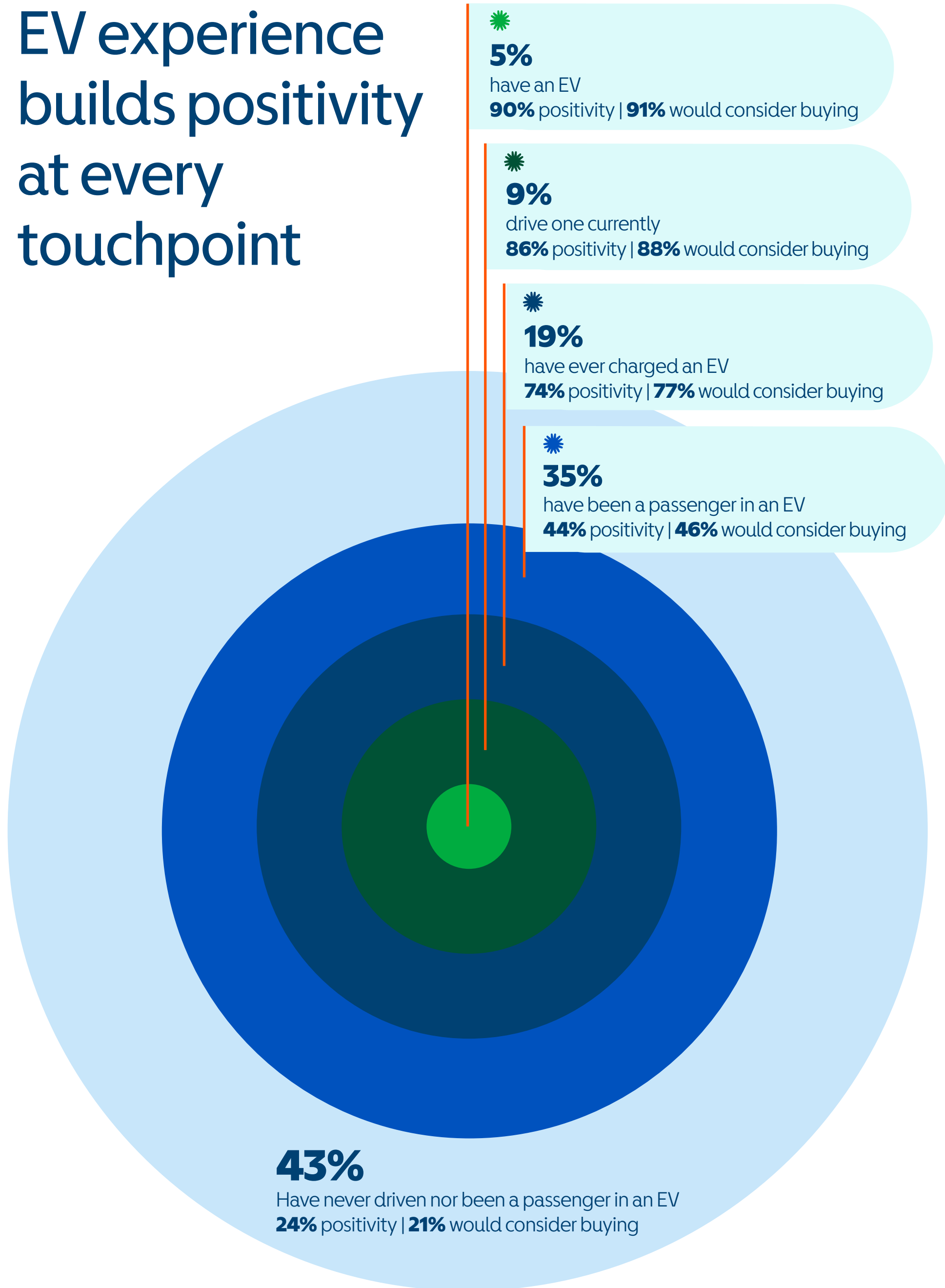
New technology can be unsettling: almost half (46%) of the UK are nervous about the shift to EVs, while only 30% are excited. Reversing these figures will require outlining the more familiar and reassuring benefits of EVs such as smoother and quieter journeys, as well as tackling the misconception that they are poor value for money.

To address this, we offer our customers a cost calculator tool which helps to showcase the financial benefits of driving an EV.

With the 2030 deadline for the sale of new petrol and diesel vehicles quickly approaching, there is no time to lose in preparing the UK public and safeguarding their mobility for years to come. These steps will help enable a smooth transition ahead of 2030 and ensure disabled people are best supported to make the shift.

[8] https://www.researchgate.net/figure/Technology-Adoption-Lifecycle-The-Chasm-Moore-1991_fig2_281060763?__cf_chl_tk=ZsldixotwtsNQ3.XM63N4scaAzsB7c4CzAyg.fZ8M6M-1748957980-1.0.1.1-Mq8vKU.eHKrsvz8iQjkD5MngQpS0D7WSGc8Ej8lTQEw

# EV experience builds positivity at every touchpoint

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