Motability Operations Electric Transition

Donna Taggart
Dealer Partner Manager
Northern Ireland

Motability Operations

About us

We are Motability Operations. We run the Motability Scheme, in which people receiving a qualifying disability allowance can choose an affordable and accessible vehicle. We play an essential role in connecting our disabled customers to work, healthcare, education and independence.

We offer our customers an all-inclusive lease package with insurance, servicing, replacement tyres, and breakdown cover included.

Our 800,000 customers give us unique insight, shaping our industry and ensuring we can keep them moving now, and in the future.

840,000+

customers on the Scheme

30%

growth in Scheme customers since 2018

16%

of all electric vehicle (EV) registrations in the UK in 2025 so far

9.6/10

customer satisfaction measured by ICS

90%

of customers renew at the end of their lease

£8.5bn

social value of the Scheme to the UK economy

80.4%

of customers say the Scheme improves their access to health services

200,000+

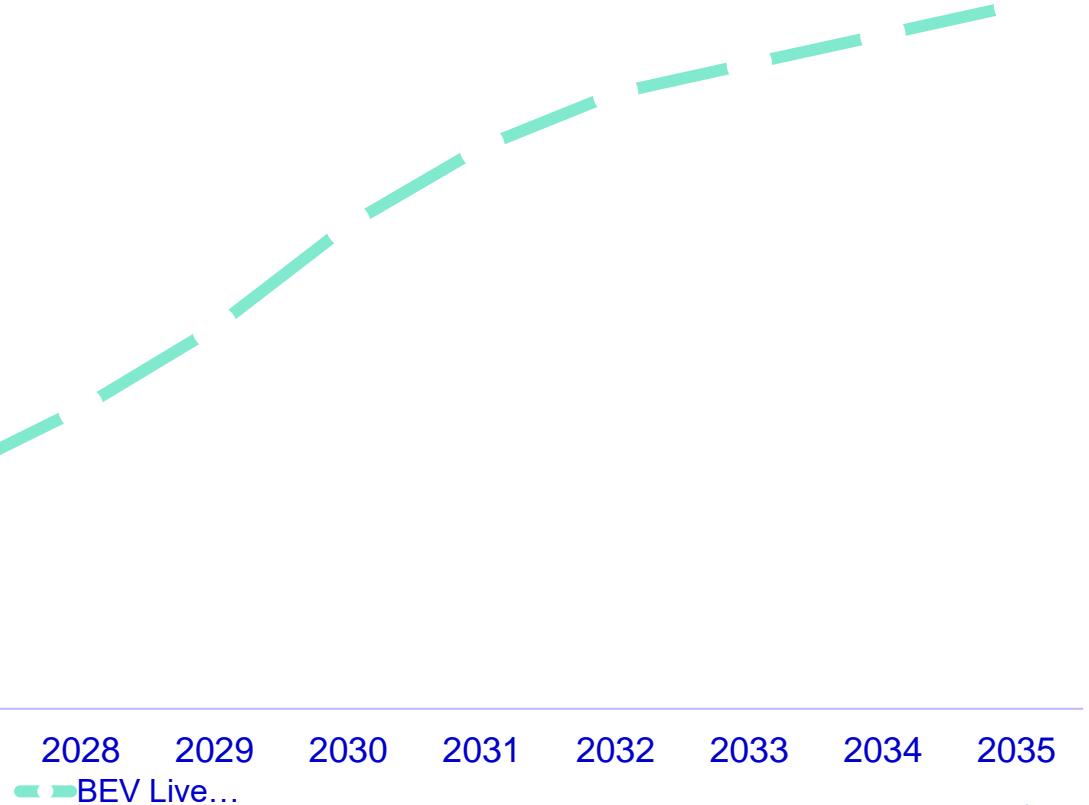disabled people supported in employment and education by the Motability Foundation

35,000

Wheelchair Accessible Vehicle (WAV) customers in the UK
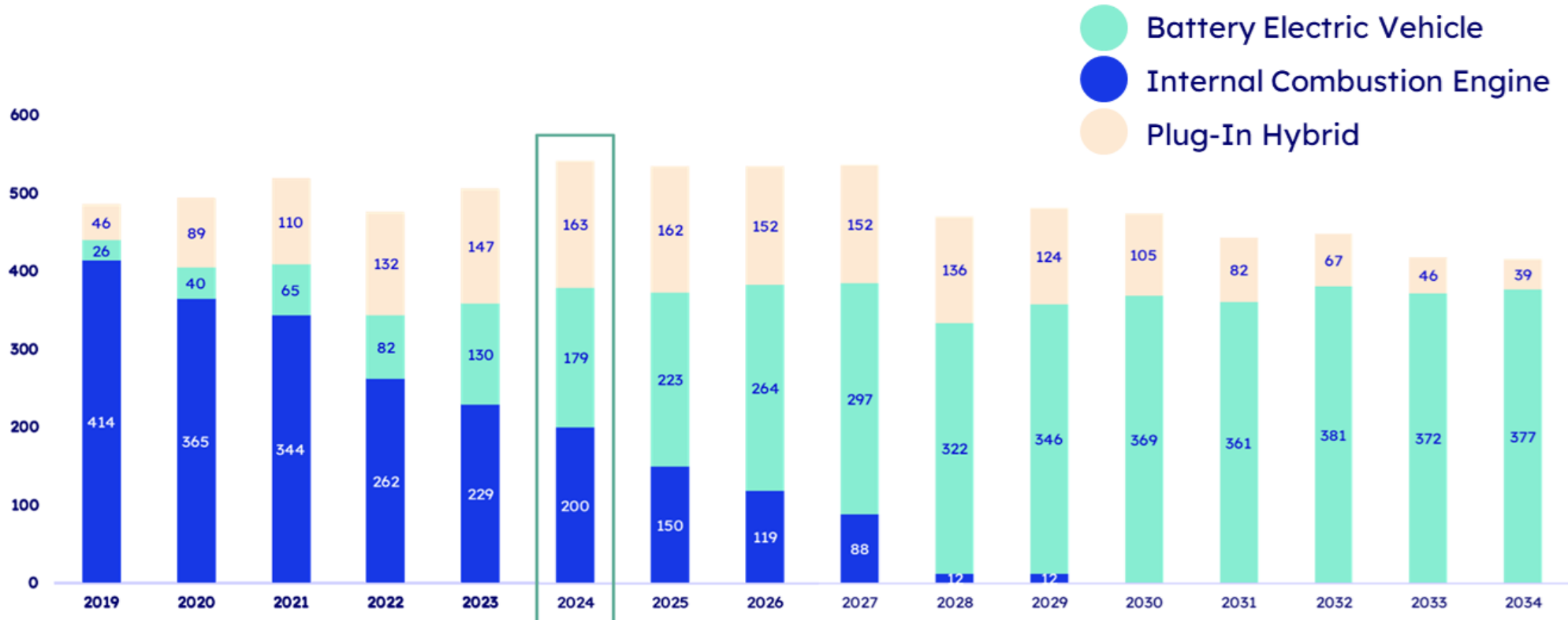
Our EV fleet is growing rapidly

And is already one of the biggest in the UK…

EV fleet currently
at 97,000+

2022   2023   2024   2025   2026   2027   2028   2029   2030   2031   2032   2033   2034   2035

BEV Live…

Our customers may be surprised by how quickly ICE vehicles are disappearing

Battery Electric Vehicle
Internal Combustion Engine
Plug-In Hybrid

Year	Plug-In Hybrid	Battery Electric Vehicle	Internal Combustion Engine
2019	46	26	414
2020	89	40	365
2021	110	65	344
2022	132	82	262
2023	147	130	229
2024	163	179	200
2025	162	223	150
2026	152	264	119
2027	152	297	88
2028	136	322	12
2029	124	346	12
2030	105	369	
2031	82	361	
2032	67	381	
2033	46	372	
2034	39	377	

Count of Unique Model Ranges by Powertrain
(Source: S&P Global Mobility, 2023)

Our EV drivers represent the mass market

With more than 97,000 EVs on the road and ambitious adoption targets, Scheme customers are right at the front of the UK's transition to EVs

Our customers are paving the way for the UK's mass adoption of EVs. So, they're facing the challenges of EV ownership first

Our typical EV owner is:

More likely to be female (57%)
Unemployed or retired (75%)
On a household income of less than £30,000 (52%)

Motability Scheme Average EV value £32,500	UK Average EV value £51,000
Most popular models: • Hyundai Kona • Renault Megane • Vauxhall Corsa • Vauxhall Mokka • MG ZS	**Most popular models:** • Audi Q4 etron • BMW i4 • Mercedes EQC • Polestar 2 • Tesla Model Y

We have a challenge to convert our customers with only 1 in 10 committed to an EV
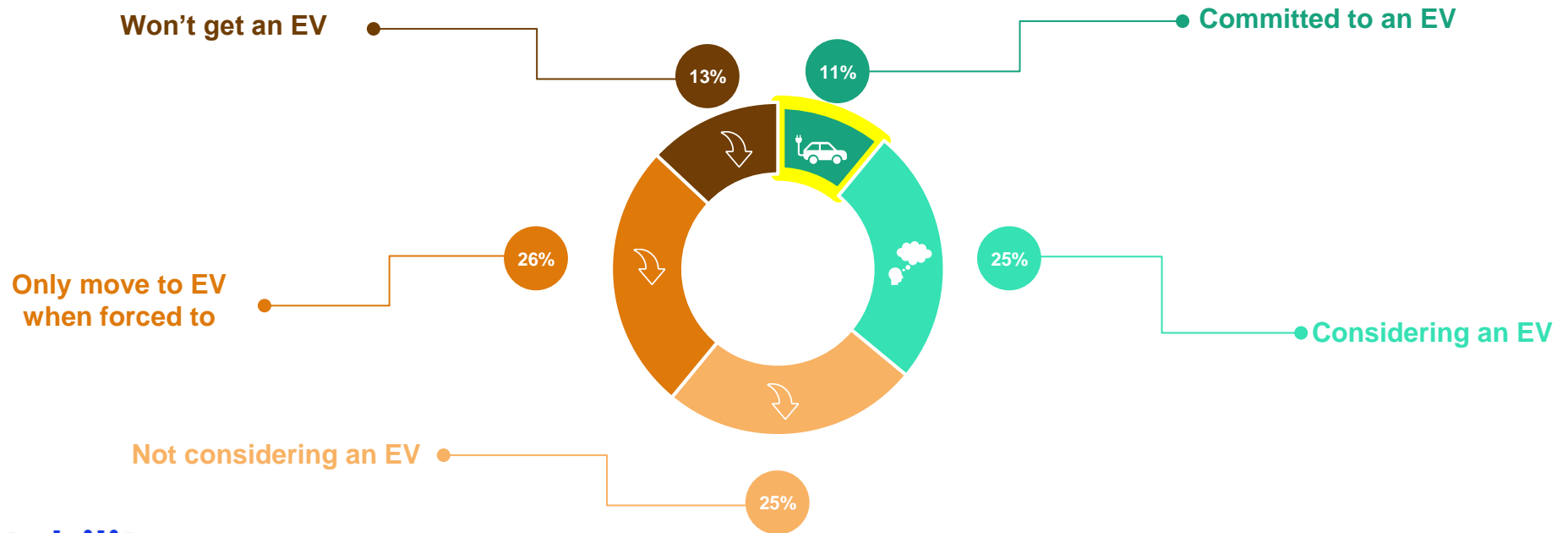
Won't get an EV — 13%

Committed to an EV — 11%

Considering an EV — 25%

Not considering an EV — 25%

Only move to EV when forced to — 26%

Motability Operations

What would need to change for you to be committed to choosing an EV for your next car?

Category	Percentage
Better public charging…	26%
Greater mileage	22%
More variety in EV…	14%
Ability to charge from…	10%
EV that suits my needs	8%
Better battery life	6%
Cheaper EVs on the…	5%
Wider choice of EVs	4%
Lower energy costs for…	3%
Less waiting time for…	2%

Q: What would need to change for you to be committed to choosing an EV for your next car?

Choose up to 3 options. 1702 responses

■ Rejectors and Considerers

Motability Operations
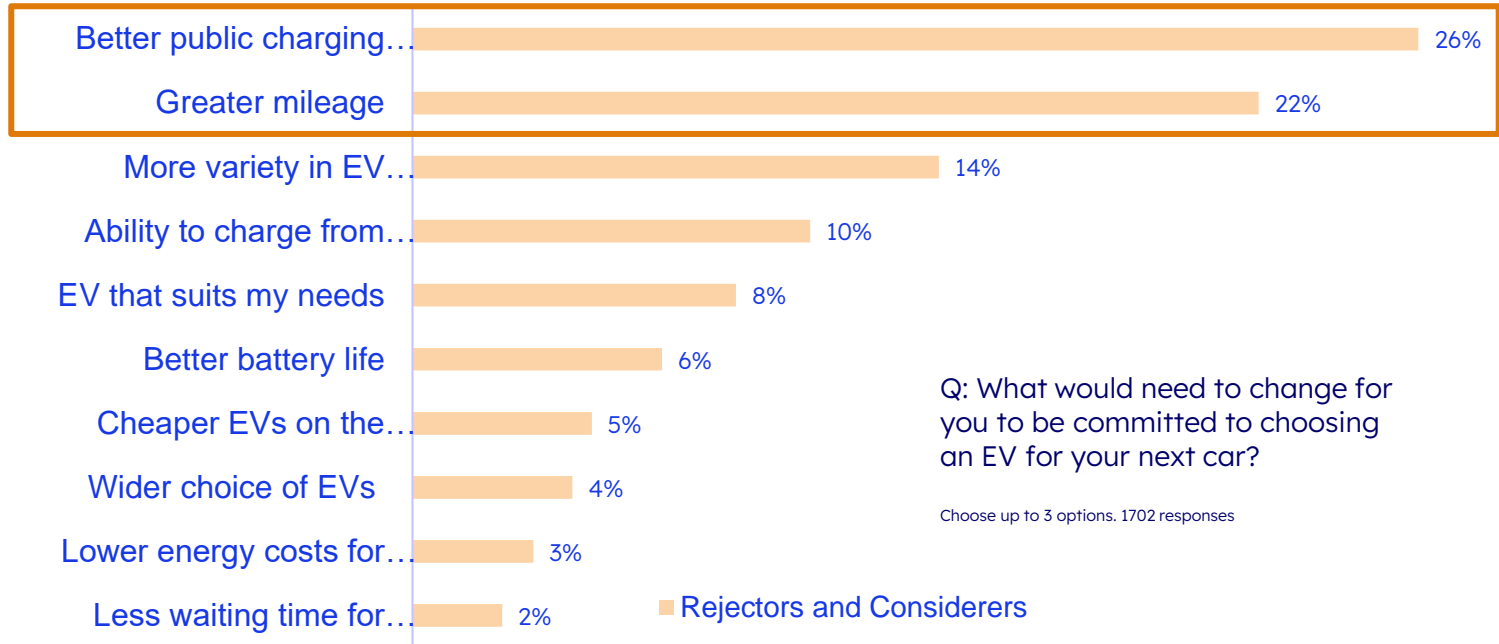
Range Anxiety is becoming less and less of a concern

Peugeot e3008
Current #1 BEV for applications
326 mile range available from £749 AP

Renault Scenic
Current #2 BEV for applications
379 mile range available from £495 AP

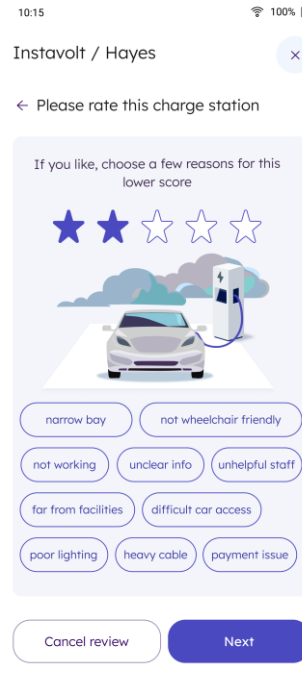# We are building solutions to overcome the challenges with public charging

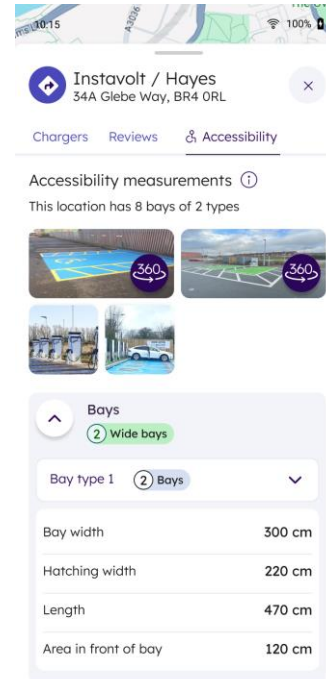# A scalable solution to a very personal and high-stakes problem – charger accessibility
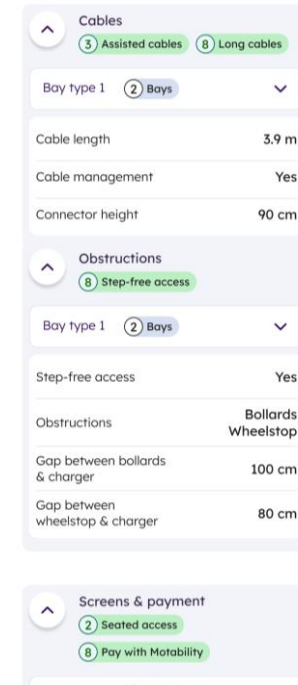
Re-branded homepage

V3 – searchable dynamic tags

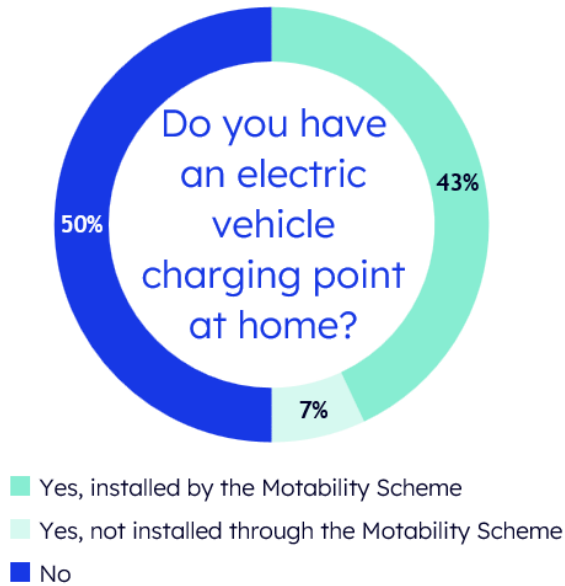### Measuring and capturing sites

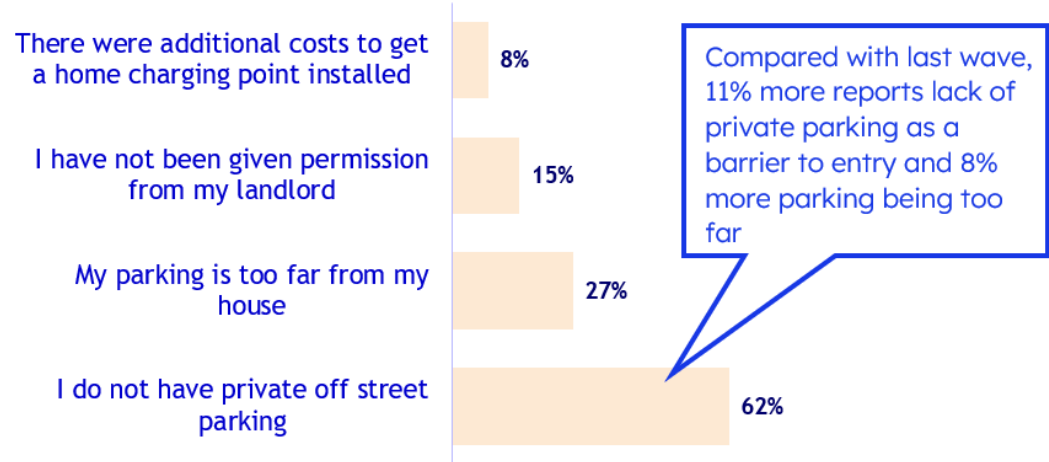### An industry-leading data standard

Barriers to installing home chargers increasing

Do you have an electric vehicle charging point at home?

- 43%
- 50%
- 7%

Legend:
- Yes, installed by the Motability Scheme
- Yes, not installed through the Motability Scheme
- No

Why do you not have an electric vehicle home charging point fitted?

Reason	%
There were additional costs to get a home charging point installed	8%
I have not been given permission from my landlord	15%
My parking is too far from my house	27%
I do not have private off street parking	62%

Compared with last wave, 11% more reports lack of private parking as a barrier to entry and 8% more parking being too far
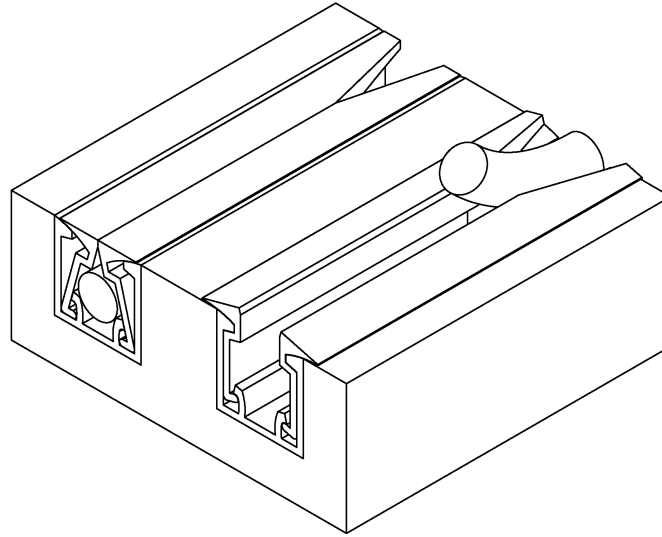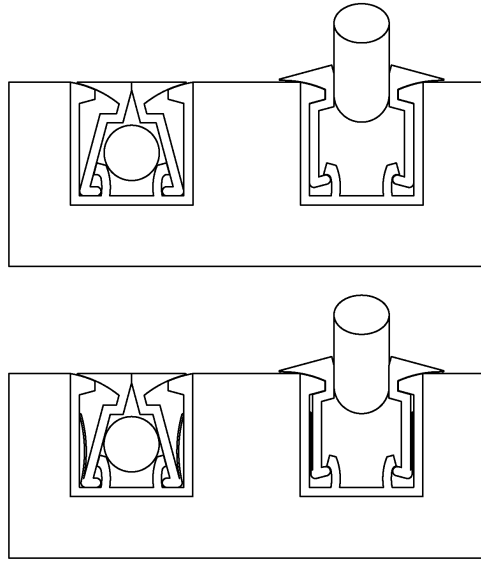
Motability Operations

Cross pavement solutions could support some of the 200k customers in terraced houses...

...But many of the solutions remain inaccessible to some customers

Motability Operations

We are working with customers to design more accessible solutions...

Cable inserted from above. V shaped notch allows cable to separate the doors. Tool used to push cable in from above
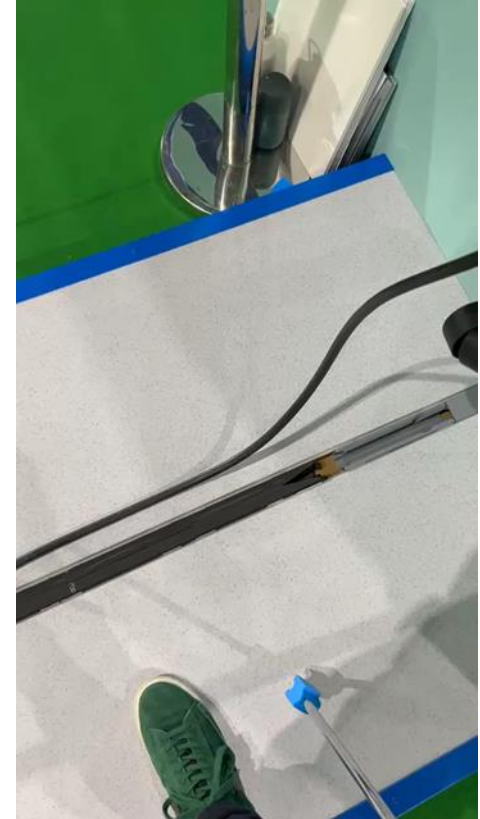
Motability Operations

...But we need industry and Local authorities to help us

We've installed more than 60,000 home chargers.

The UK's biggest public chargepoint operator by charger installs is Ubitricity

It has 8,000 on street chargers...

Motability
Operations

25%

Number of customers with a home charger who live within 0.25 miles of a customer with no off-street parking

That could open up a network of 75k charges within a short distance of customers with no home charging

Customer Type ● Chargee ● Host

Motability Operations

We are building solutions to support our customers but cannot do it alone…

Lets work together to solve the transition for everyone

Thank you!

Motability Operations