

Technology Tracker: Autumn Wave 2025

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Transport
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1 Overview

The Autumn 2025 wave of the Department for Transport's Transport Technology Tracker series involved a survey of a representative sample of 4,976 individuals aged 16+ across the UK. The survey was conducted using a random probability sampling approach, inviting up to two adults from 17,000 households to take part. Fieldwork took place between 16th October and 27th November 2025¹.

This report presents findings from the Autumn 2025 wave, offering insights into current public perceptions of transport technology across the UK. Where survey questions have remained unchanged, comparisons have been made with the Autumn 2024 and Spring 2025 waves. However, comparisons with earlier waves are not included, as differences in sample composition and measurement mode introduced in Autumn 2024 make such comparisons inadvisable. All previous reports remain available for those interested in exploring long-term trends.

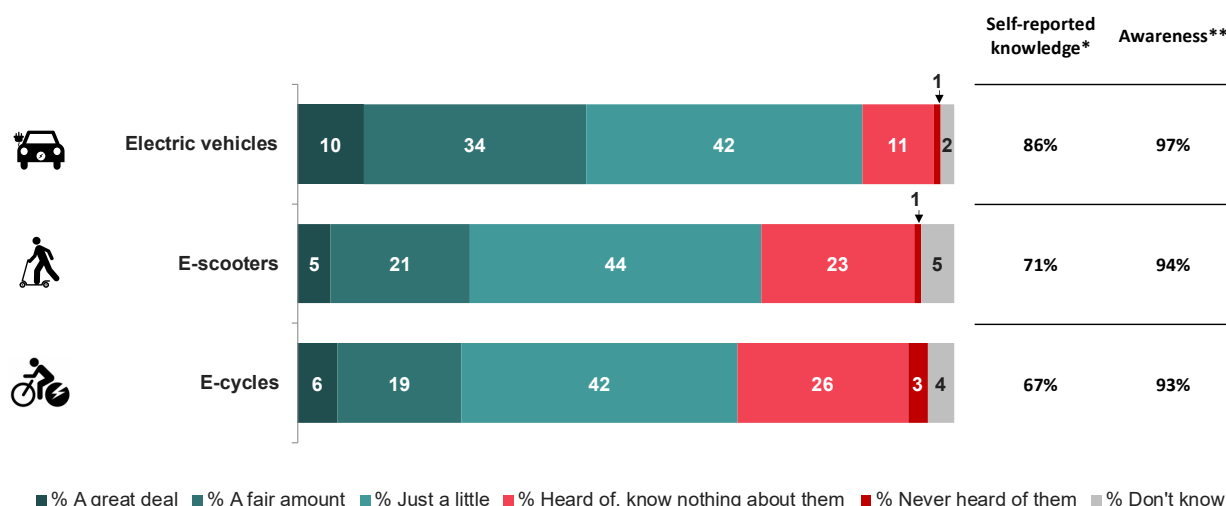
When reviewing this report, it is important for readers to note that any differences highlighted as statistically significant are evaluated at a 95% confidence level, indicating a high degree of reliability in the observed differences among different subgroups. Differences between subgroups were assessed using Quantum, an industry-standard software for market research. More information about the methodology and the sample can be found in the Appendix. The survey questionnaire is also included in the Appendix, including the descriptions used for several transport technologies.

¹ The vast majority of fieldwork was undertaken before the release of the Autumn Budget on 26th November 2025, which announced new tax measures coming in 2028 affecting electric vehicle ownership.

1.1 Awareness and knowledge

Figure 1.1 below shows the levels of awareness and self-reported knowledge for the range of transport technologies included in the Autumn 2025 wave.

Figure 1.1: Awareness and knowledge by technology



*Self-reported knowledge answer codes: A great deal, A fair amount, Just a little (combined)

**Awareness answer codes: A great deal, A fair amount, Just a little, Heard of, know nothing about them / it (combined)

Base: All 16+ in UK (unweighted valid responses, Autumn 25: Electric vehicles: 4960; electric scooters: 4967; e-cycles: 4957)

Individual sections of this report, and the summary sections at the start of each, describe awareness and self-reported knowledge for the technologies in more detail.

Across these technologies, awareness and self-reported knowledge varied. Electric vehicles (EVs) had the highest levels of both awareness and self-reported knowledge. High levels of awareness were also observed for e-scooters and e-cycles, however both technologies had lower levels of self-reported knowledge compared to EVs.

1.2 Current and future usage of technology

Car purchase intentions remained high, with 67% of people saying they would buy, lease or replace a car or van in the future, consistent with Autumn 2024 and Spring 2025. Of those intending to buy or lease in the future, petrol was the most common choice (36%), followed by hybrid (27%), diesel (15%) and electric/battery only (13%). Overall, these figures remained consistent with Spring 2025, with no statistically significant changes. They also remained relatively consistent with the Autumn 2024 findings; however, there was a statistically significant increase in people planning to buy or lease an EV next compared to the Autumn 2024 findings (13% in Autumn 2025, 10% in Autumn 2024).

1.3 Attitudes towards technology

When a list of potential advantages and disadvantages of each transport technology was shown, clear patterns emerged in how people viewed EVs, e-scooters, and e-cycles. As found when these technologies were explored before in Autumn 2024, all three were recognised as offering environmental benefits, but they were also linked with specific disadvantages that could deter their adoption. Cost and charging concerns were key issues for EVs. Safety and regulatory issues were more prominent for e-scooters and e-cycles.

EVs: A major perceived advantage was their environmental benefit (67%). Furthermore, compared to petrol or diesel cars or vans they were seen to offer less noise (48%), reduced road tax (38%) and were increasingly seen as being cheaper to run and maintain (35%) compared to 31% in both Spring 2025 and Autumn 2024. However, concerns related to the mileage range on a single charge (70%), availability of charge points (69%) and the cost to buy (64%).

E-scooters: Key perceived benefits included convenience and speed, making them be seen as quicker for getting around than walking (53%) and ideal for short journeys (39%), similar to the Autumn 2024 wave. They were also seen to offer environmental advantages (32%), similar to EVs. However, safety risks such as posing a risk on busy roads (78%) and to pedestrians (77%), and users not following the law (69%), were key concerns.

E-cycles: The key benefits of e-cycles selected were convenience and environmental benefits. For example, a majority thought they require less effort and travel faster compared to a push-bike (66%) and just under half (49%) thought they offer environmental benefits, in line with the Autumn 2024 wave. However, concerns existed regarding their cost (64%), the risk of theft (59%), battery fire risk (38%) and the weight of e-cycles (38%).

1.4 Report structure

This report covers each of these transport technologies in more detail but starts with car access and purchase intentions.

Summary boxes have been included at the start of each section to present key findings. These are annotated to signpost the reader to further information where it is available.

Full survey data have been published alongside this report.

2 Car access and purchase intention

2.1 Summary

- In line with Spring 2025, ownership of and access to cars or vans was high, with a majority of people living in car-owning households saying they personally owned or had continuous use of at least one vehicle. Nearly half said their household had two or more cars or vans (see section 2.2).
- Among people intending to buy or lease a car or van in the future, most expected to buy or lease a second-hand vehicle rather than a new one, consistent with Spring 2025 (see section 2.4).
- Petrol remained the most popular fuel type for future car or van purchases, followed by hybrids, diesel and electric/battery only. Intention to purchase or lease an electric/battery only car or van in the future remained stable with Spring 2025, following a statistically significant increase of 3 percentage points from the Autumn 2024 wave (see section 2.5).
- Intention to buy or lease petrol or hybrid cars or vans remained strong regardless of when in the next five years the purchase was expected to occur. Compared to Spring 2025, intention to buy or lease an electric/battery only car or van within 1 to 2 years saw a statistically significant increase of 5 percentage points, while intention to buy or lease a hybrid within 3-5 years saw a statistically significant decrease of 7 percentage points (see section 2.5).

2.2 Ownership of licences and cars

In Autumn 2025, 80% of people aged 17 and over said they hold a full UK driving licence, consistent with Spring 2025 and Autumn 2024. Similarly, the proportions of people who said they hold a provisional licence (7%) and people who did not hold a valid UK driving licence (11%) remained stable with Spring 2025 and Autumn 2024.

Household car ownership and usage remained comparable with findings in Spring 2025 and Autumn 2024. In Autumn 2025, most people aged 16 and over (86%) said their household owned or had continuous use of at least one car or van, compared to 85% in Spring 2025 and 86% in Autumn 2024. Forty-eight percent said their household owned or had continuous use of two or more cars or vans, remaining stable with 47% in Spring 2025.

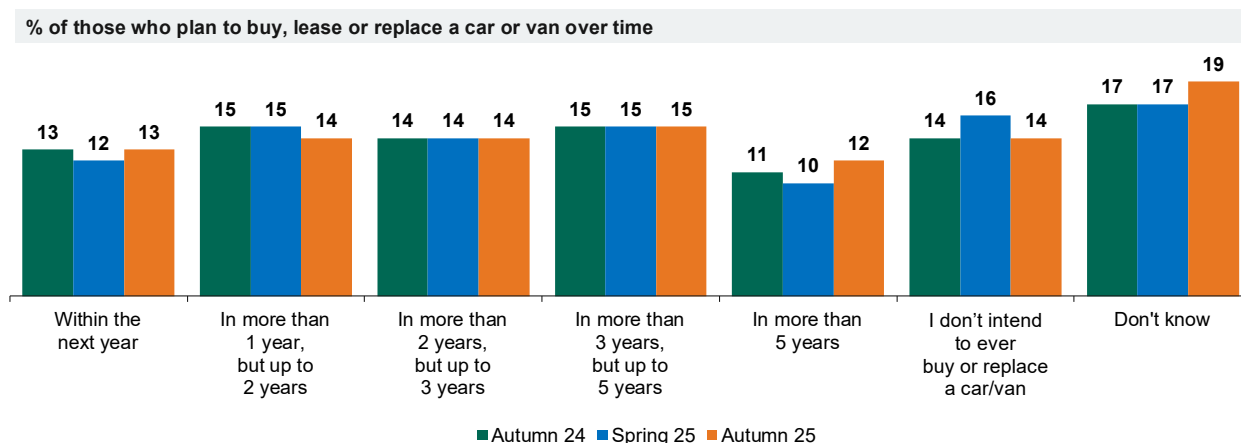
A majority (83%) of people who lived in a household that had a car or van said they personally owned or had continuous use of at least one car or van (a minority, 16%, did not). This was consistent with the Spring 2025 wave (85%) and Autumn 2024 wave (82%).

2.3 Purchase/lease intentions

Consistent with Spring 2025 and Autumn 2024, in Autumn 2025 over two-thirds of people in the UK (67%) said they would personally buy, lease or replace a new or second-hand car or van in the future. Over half of people (55%) said they would purchase a vehicle within the next five years, and a further 15% in more than five years' time, as shown in **Figure 2.1**.

Just under one in six (14%) said they do not ever intend to buy or replace a new car or van, similar to Spring 2025 and Autumn 2024.

Figure 2.1: Vehicle purchase intentions by year of expected purchase



Q104 [Postal survey Q6]. When, if at all, do you think you will personally next buy, lease or replace a car or van, either new or second hand?
Base: All 16+ in UK (unweighted valid responses, Autumn 24: 7082, Spring 25: 4053, Autumn 25: 4961)

▲ Indicates a statistically significant increase compared to previous wave
▼ Indicates a statistically significant decrease compared to previous wave

▲ Indicates a statistically significant increase compared to Autumn 24 wave
▼ Indicates a statistically significant decrease compared to Autumn 24 wave

- Men were more likely than women to say they will buy or replace a car or van within the next year (15% compared to 11%).
- People aged 70+ were more likely to say they never intend to buy or replace a car or van in the future (31%) compared to people aged 16-29 (7%), 30-49 (10%) and 50-69 (12%).
- People living in North-East England and London were more likely not to intend to buy or replace a car or van in the future (22% for both) compared to people living in all other regions of England (excluding North-East England and London) (12%).
- People from the highest income households (earning £52,000-£99,999 and £100,000 and above per annum) were more likely to say they will buy or replace a car or van within the next year (18% and 17%, respectively) compared to people in households earning up to £25,999 (11%) and £26,000-£51,999 (13%) per annum.

2.4 New or second-hand?

Among people who intended to buy or lease a car or van at some point in the future, the proportion in Autumn 2025 who expected this to be new (23%) remained stable compared to both Spring 2025 and Autumn 2024. Just over seven in 10 (71%) said their next car or van would most likely be second-hand.

- People aged 50-59 and 70+ were more likely to intend to buy a new car/van (28% and 32%, respectively) compared to people aged 16-29 (13%) and 30-49 (20%). Conversely, younger adults aged 16-29 were the most likely to say their next car/van would be second-hand (79%) compared to people aged 30-49 (73%), 60-69 (66%) and 70+ (64%).
- People who intended to buy/lease a vehicle within the next year were more likely to say this would be a new vehicle (28%) compared to people who intended to do this in more than 3 years (16%).
- People who intended to buy/lease a hybrid or electric/battery only car or van next, were more likely to say it would be new (32% and 39%, respectively), compared to people who intended to buy or lease a new petrol (18%) or diesel (11%) car or van. Conversely, people who intended to buy or lease a diesel or petrol car or van next, were more likely to say it would be second-hand (86% and 78%, respectively), compared to people who intended to buy or lease a second-hand hybrid (61%) or electric/battery only (55%) car or van.

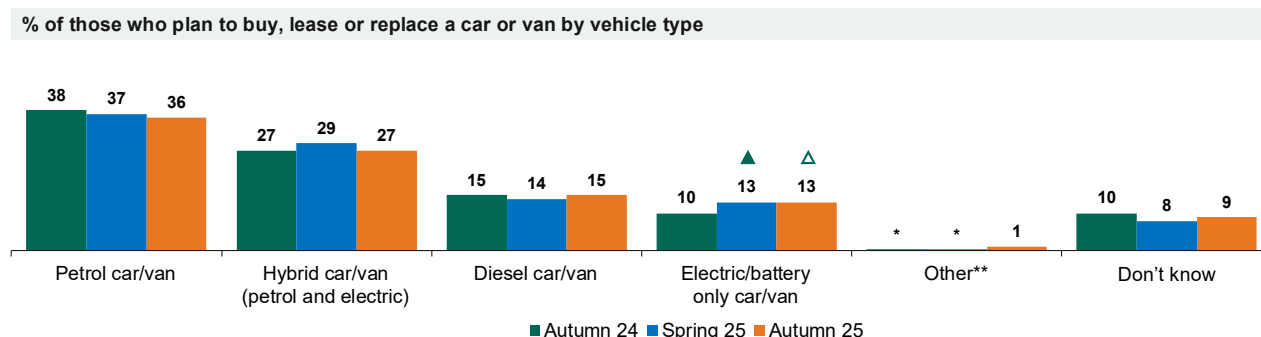
2.5 Vehicle type

Around one in eight people in the UK (13%) who intended to buy, lease or replace a car in the future said it will be an electric/battery only car or van, which remains consistent with the Spring 2025 findings, following a 3 percentage point increase from 10% in Autumn 2024, as shown in **Figure 2.2**.

Plans to buy, lease or replace other engine types remained consistent with Spring 2025, with people being more likely to select petrol car or van (36%), compared to a hybrid (27%) or diesel (15%) car or van.

Around one in twelve (9%) did not know which car or van type they would choose in the future, remaining consistent with Spring 2025 and Autumn 2024.

Figure 2.2: Vehicle type purchase intentions



Q106 [Postal survey Q8]. What type of car or van do you think you will most likely purchase or lease next time?

Base: All 16+ in UK who intend to buy or replace a car/van (unweighted valid responses, Autumn 24, 4878, Spring 25: 2734, Autumn 2025: 3354). **Note: Includes those who said, 'depends on cost/affordability/what is available'.

▲ Indicates a statistically significant increase compared to previous wave
▼ Indicates a statistically significant decrease compared to previous wave

▲ Indicates a statistically significant increase compared to Autumn 24 wave
▼ Indicates a statistically significant decrease compared to Autumn 24 wave

Key subgroup analysis among people who intended to buy or replace a car or a van in the future:

Petrol vehicles

- People aged 16-29 and 70+ were more likely to intend to buy or lease a petrol car or van next time (44% and 40%, respectively) compared to people aged 30-49 (32%) and 50-69 (33%).
- Urban residents were more likely to intend to buy or lease a petrol car or van next time (37%) compared to rural residents (31%).
- People from the lowest income households earning up to £25,999 per annum were more likely to intend to buy or lease a petrol car or van next (48%) compared to people earning £26,000 and above per annum (33%).

Hybrid vehicles

- People aged 70+ were more likely to say they will buy or lease a hybrid car or van next time (34%) compared to people aged 16-29 (21%), 30-49 (25%) and 50-69 (29%).
- London residents were more likely to intend to buy or lease a hybrid car or van next time (36%) compared to people living in all other regions of England (26%).

Diesel vehicles

- Men were more likely than women to say they will buy or lease a diesel car or van next time (18% and 12%, respectively).
- Rural residents were more likely to intend to buy or lease a diesel car or van next (22%) compared to urban residents (13%).
- People living in Northern Ireland were more likely to intend to buy or lease a diesel car or van next (28%) compared to people in England (14%) and Scotland (14%).

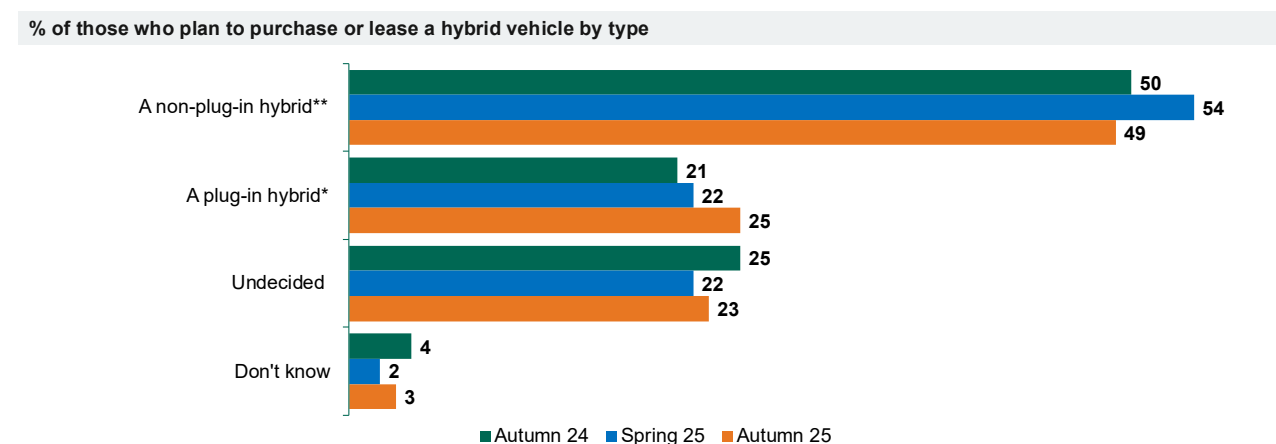
Electric vehicles

- People aged 30-49 and 50-69 were more likely to intend to buy or lease an electric/battery only car or van next time (16% and 15%, respectively) compared to people aged 16-29 (7%) and 70+ (10%).
- People living in Scotland were more likely to intend to buy or lease an electric/battery only car or van next time (16%) compared to people in Northern Ireland (7%).
- People from the highest income households earning £100,000 and above per annum were more likely to intend to buy or lease an electric/battery only car or van next (24%) compared to people in lower income households (7% in households earning up to £25,999 per annum, 12% in households earning between £26,000-£51,999 and 15% in households earning between £52,000-£99,999 per annum).

People who intended to buy or lease a new car or van were more likely to choose hybrid (37%) compared to people who intended to buy or lease a second-hand car or van (23%).

Of people who said they would most likely buy or lease a hybrid car or van next time, almost half (49%) said it would be a non-plug-in hybrid, a quarter (25%) said they would purchase a plug-in hybrid and a further 23% were undecided. These proportions were similar to the findings in Spring 2025 and Autumn 2024, as shown in Figure 2.3.

Figure 2.3: Hybrid vehicle type purchase intentions



* Plug-in hybrid (that plugs into an external power source to recharge)

** Non-plug-in hybrid (that recharges while driving and is ultimately fuelled by petrol or diesel – it cannot be plugged into an external power source)

Q107 [Postal survey Q9]. What type of hybrid car or van do you think you will most likely purchase or lease next time?

Base: All 16+ in UK who will most likely purchase a hybrid car/van (unweighted valid responses, Autumn 24: 1459, Spring 25: 847, Autumn 25: 972)

▲ Indicates a statistically significant increase compared to previous wave

▼ Indicates a statistically significant decrease compared to previous wave

▲ Indicates a statistically significant increase compared to Autumn 24 wave

▼ Indicates a statistically significant decrease compared to Autumn 24 wave

Key subgroup analysis among people who said they were most likely to purchase a hybrid car or van next:

- People aged 50-69 and 70+ were more likely to intend to purchase or lease a non-plug-in hybrid (54% and 60%, respectively) compared to people aged 16-29 (38%) and 30-49 (45%).
- People from the highest income households earning £100,000 or more per annum were more likely to intend to buy or lease a plug-in hybrid (46%) compared to people in lower income households earning up to £25,999 (19%), £26,000–£51,999 (17%) and £52,000–£99,999 (25%) per annum. Conversely, people living in households earning up to £25,999, £26,000–£51,999 and £52,000–£99,999 were more likely to plan to purchase or lease a non-plug-in hybrid (55%, 59% and 46%, respectively) compared to the highest income households (£100,000 and above per annum) (32%).

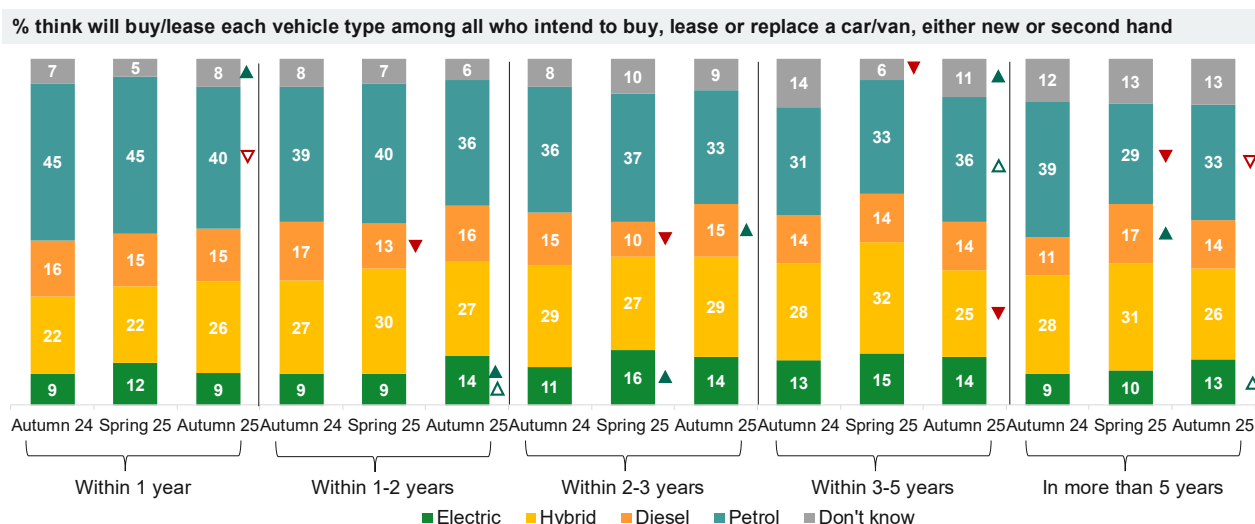
As was found between the Autumn 2024 and Spring 2025 waves, there were some key shifts in vehicle purchase and lease intention between Spring 2025 and Autumn 2025, as seen in **Figure 2.4**. The proportion of people intending to buy an electric vehicle 'within 2 to 3 years' in Autumn 2025 (14%) remained stable after a statistically significant increase from Autumn 2024 (11%) to Spring 2025 (16%). However, Autumn 2025 saw a significant increase in people intending to buy or lease an electric vehicle 'within 1 to 2 years' (14%) compared to Spring 2025 (9%) and Autumn 2024 (9%). There was also a significant increase in people intending to buy or lease an electric vehicle 'in more than 5 years' from Autumn 2024 (9%) to Autumn 2025 (13%).

In Autumn 2025, intention to buy or lease a petrol vehicle 'within one year' has seen a significant decrease in Autumn 2025 (40%) compared to Autumn 2024 (45%). Among people expecting to buy or lease a car or van 'within one year', 26% expected to choose a hybrid, 15% a diesel and 9% an electric/battery only car or van, in line with Spring 2025 and Autumn 2024.

In contrast, among people expecting to buy or lease a car or van 'in more than 5 years', 26% expected to choose a hybrid car or van, 33% a petrol, 14% a diesel and 13% an electric/battery only car or van.

People intending to buy or lease a car or van 'in more than 5 years' were more likely not to know (selecting 'don't know') what type of car or van it would be, compared to people who intended to do the same in the next year (13% compared to 8%).

Figure 2.4: Vehicle type purchase intentions by year of expected purchase



Q104 [Postal survey Q6]. When, if at all, do you think you will personally next buy, lease or replace a car or van, either new or second hand? | Q106 [Postal survey Q8]. What type of car or van do you think you will most likely purchase or lease next time? | Base: All 16+ in UK who intend to buy or replace a car or van (unweighted valid responses, Autumn 24: 4878, Spring 2025: 2734, Autumn 25: 3354)

▲ Indicates a statistically significant increase compared to previous wave
▼ Indicates a statistically significant decrease compared to previous wave

▲ Indicates a statistically significant increase compared to Autumn 24 wave
▼ Indicates a statistically significant decrease compared to Autumn 24 wave

3 Electric vehicles

3.1 Summary

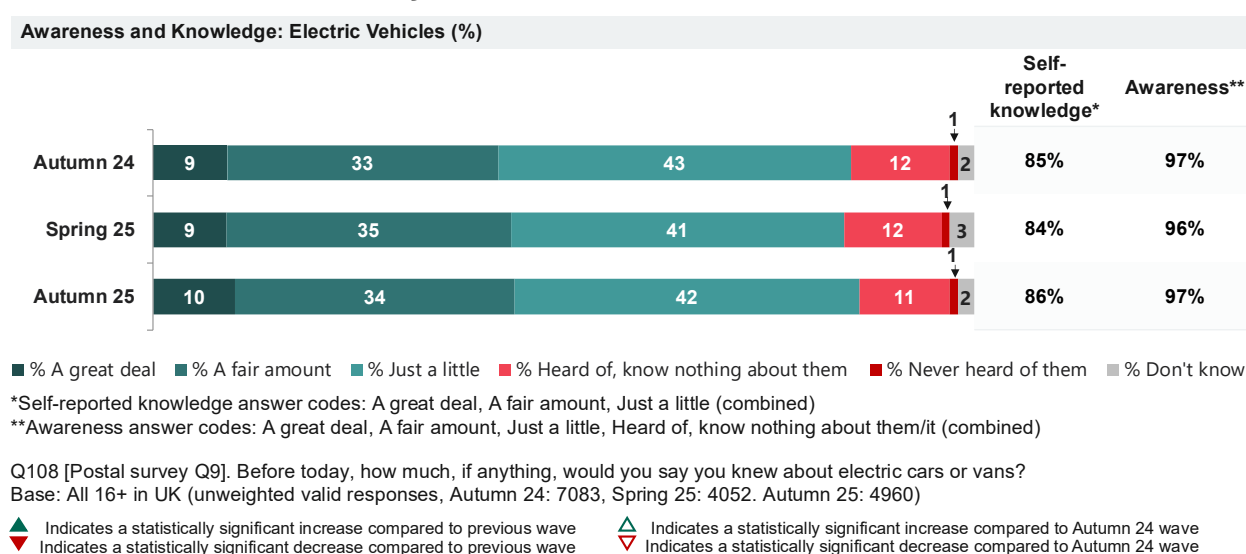
- Awareness and self-reported knowledge of EVs was high, in line with Spring 2025 and Autumn 2024. Almost everyone said they had heard of them (see section 3.2).
- ‘Environmental benefits’ continued to be the most selected advantage from the list of potential advantages of EVs, followed by EVs being ‘less noisy’ and having ‘reduced road tax’. ‘Reduced road tax’ remained consistent with Spring 2025, following a statistically significant decrease in people selecting it as an advantage in Spring 2025, compared to Autumn 2024 (see section 3.3).
- ‘Less distance can be travelled on one charge’ became the most selected disadvantage of EVs in Autumn 2025, overtaking ‘not enough charging points’, which saw a statistically significant decrease and fell to second most selected. This was followed by ‘cost to buy’ which was the third most commonly selected disadvantage (see section 3.4).
- Most people had seen an EV charge point in the last month with the most common locations being at a supermarket, followed by at a public or council car park and at a garage/petrol station. Across several locations, there was a statistically significant increase in EV charge point sightings compared to Autumn 2024 (see section 3.5).
- ‘The inconvenience of having to wait while the vehicle charged’ was the most selected concern from the list of potential concerns of public EV charge points. This was closely followed by concerns about ‘uncertainty about whether the charge point would be available when I needed it due to having to queue to use it’ and ‘the time it would take to re-charge’ (see section 3.6).

3.2 Awareness and knowledge

'Awareness' encompasses all people who had heard of EVs, including people who say they have 'heard of but know nothing about them', and people who say they know 'just a little', 'a fair amount' or 'a great deal'. 'Self-reported knowledge' is confined to people who said that they know 'just a little', 'a fair amount' or 'a great deal'.

In Autumn 2025, overall levels of awareness and self-reported knowledge of electric vehicles (EVs) were in line with findings from Spring 2025 and Autumn 2024, as shown in **Figure 3.1**. Almost everyone said they had heard of EVs, including people who had heard of them but know nothing about them (97%). Only a small minority of people were not aware of them (1% had 'never heard of them' and 2% selected 'don't know').

Figure 3.1: Awareness and knowledge of electric vehicles



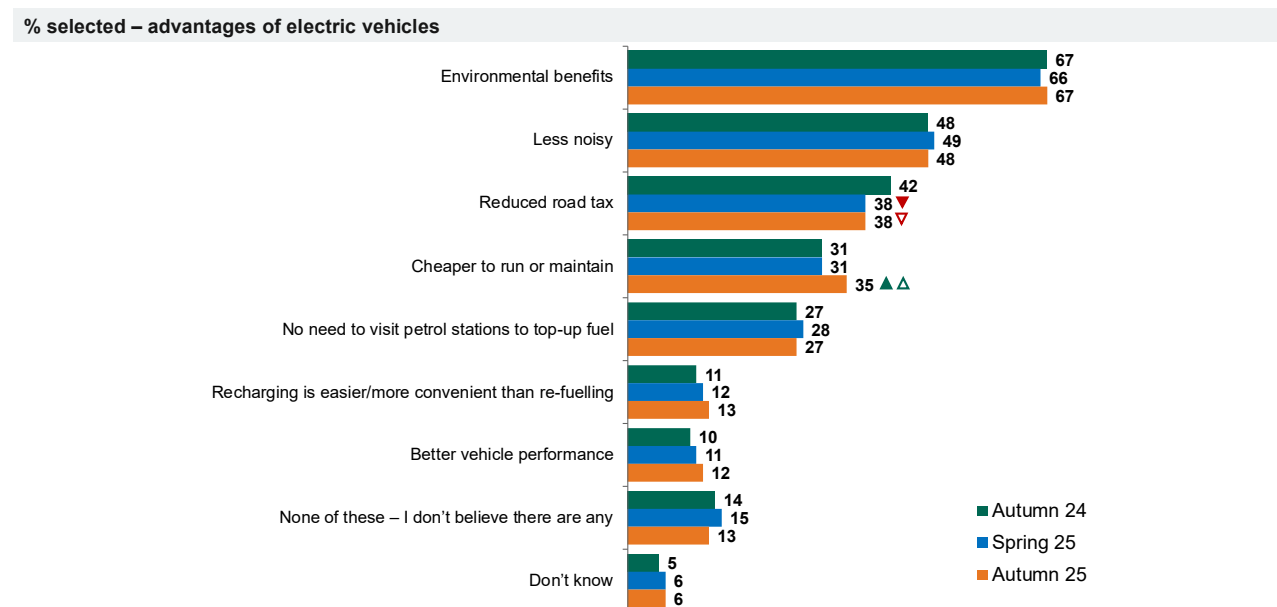
- Men were more likely than women to have higher levels of self-reported knowledge (92% and 82%, respectively). They were also more likely to say they know a great deal/fair amount about electric vehicles (59% and 32%, respectively).
- People aged 16-29, 30-49 and 50-69 were more likely to say they know a great deal/fair amount about electric vehicles (48%, 47% and 47%, respectively) compared to people aged 70+ (33%).
- People living in England were more likely to have higher levels of self-reported knowledge of electric vehicles (87%) compared to people living in Scotland (80%) and Northern Ireland (81%).

3.3 Advantages - prompted

When shown a list of potential advantages of EVs over petrol or diesel cars or vans, 'environmental benefits' was the most frequently selected advantage (67%), followed by 'less noisy' (48%), consistent with Spring 2025 and Autumn 2024, in Autumn 2025, as shown in **Figure 3.2**. Whilst the third most selected advantage continued to be, 'reduced road tax', following a statistically significant decrease in Spring 2025, the proportion of people selecting this in Autumn 2025 (38%) remained statistically significantly lower than in Autumn 2024 (when it was 42%). Additionally, the proportion of people selecting EVs being 'cheaper to run or maintain' saw a statistically significant increase in Autumn 2025 (35%) compared to Spring 2025 and Autumn 2024 (31% for both).

On average, people selected two advantages of EVs, consistent with Spring 2025 and Autumn 2024.

Figure 3.2: Advantages of electric vehicles



Q111 [Postal survey Q10]. Which of the following, if any, do you think are advantages of fully electric over petrol or diesel cars or vans? | Note: answer options with <1% have been hidden from the chart to improve visibility.

Base: All 16+ in UK (unweighted valid responses, Autumn 24: 7080, Spring 25: 4055, Autumn 25:4966)



Indicates a statistically significant increase compared to previous wave



Indicates a statistically significant decrease compared to previous wave

- Men were more likely than women to select that electric vehicles are 'less noisy' (50% compared to 46%) and 'reduced road tax' (41% compared to 35%). Women were more likely than men to select 'environmental benefits' (70% compared to 65%).
- Younger adults aged 16-29 were more likely to select the 'environmental benefits' of electric vehicles (76%) compared to people aged 30-49 (68%), 50-69 (64%) and 70+ (60%). They were also more likely than these age groups to select 'less noisy' (56% compared to 47%, 47% and 41%, respectively), 'recharging is easier/more convenient than re-fuelling' (22% compared to 12%, 11% and 11%, respectively) and 'better vehicle performance' (22% compared to 12%, 9% and 7%, respectively).

- For several perceived advantages, people living in the highest income households were more likely to select them than people living in the lowest income households. For example, people living in households earning £100,000 and above per annum were more likely to select 'environmental benefits' (78%) compared to people living in households earning up to £25,999 (61%) and £26,000–£51,999 (69%).
- For all perceived advantages, people whose main vehicle is electric/battery only were more likely to select these compared to people whose main vehicle is a petrol, diesel or hybrid. For example, 83% of people whose main vehicle is an electric/battery only selected 'cheaper to run or maintain' compared to people whose main vehicle is a diesel (30%), petrol (31%) or hybrid (45%). Similarly, people who intended to buy an electric/battery only vehicle next were more likely to select all perceived advantages than people who intended to buy a petrol, hybrid and diesel vehicle.

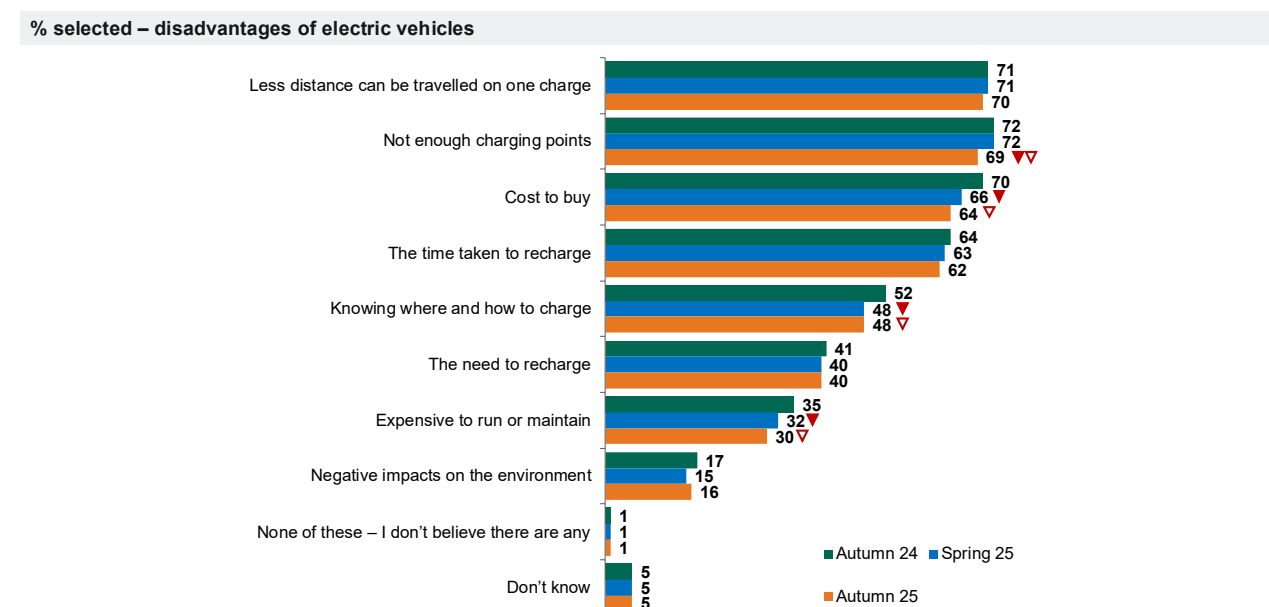
3.4 Disadvantages – prompted

In Autumn 2025, participants were shown a list of potential disadvantages of EVs of petrol or diesel cars or vans. 'Less distance can be travelled on one charge' was the most frequently selected disadvantage (70%), overtaking 'not enough charging points' (69%), which had been the top selection in both Spring 2025 and Autumn 2024 (72% for both), as shown in **Figure 3.3**. This represented a statistically significant decrease for 'not enough charging points', which in Autumn 2025 was the second most frequently selected.

'Cost to buy' remained the third most frequently selected disadvantage (64%), which was statistically significantly lower than Autumn 2024 (70%). Both 'knowing where and how to charge' and 'expensive to run or maintain' remained relatively consistent with Spring 2025, following statistically significant decreases between Autumn 2024 and Spring 2025.

On average, people selected four disadvantages of EVs.

Figure 3.3: Disadvantages of electric vehicles



Q113 [Postal survey Q11]. Which of the following, if any, do you think are disadvantages of fully electric over petrol or diesel cars or vans? | Note: answer options with <2% have been hidden from the chart to improve visibility.

| Base: All 16+ in UK (unweighted valid responses, Autumn 24: 7080, Spring 25: 4054, Autumn 25: 4966)

▲ Indicates a statistically significant increase compared to previous wave
▼ Indicates a statistically significant decrease compared to previous wave

▲ Indicates a statistically significant increase compared to Autumn 24 wave
▼ Indicates a statistically significant decrease compared to Autumn 24 wave

- Men were more likely than women to select a range of perceived disadvantages compared to women. For example, they were more likely to select that there are 'not enough charging points' (71% compared to 68%), the 'cost to buy' (67% compared to 61%), 'time taken to recharge' (67% compared to 59%) and the 'negative impacts on the environment' (18% compared to 14%). Whereas women were more likely than men to select 'knowing where and how to charge' as a perceived disadvantage (50% compared to 45%).
- For several of the perceived disadvantages of electric vehicles, people aged 50-69 were more likely than other age groups to select these. For example, they were more likely to

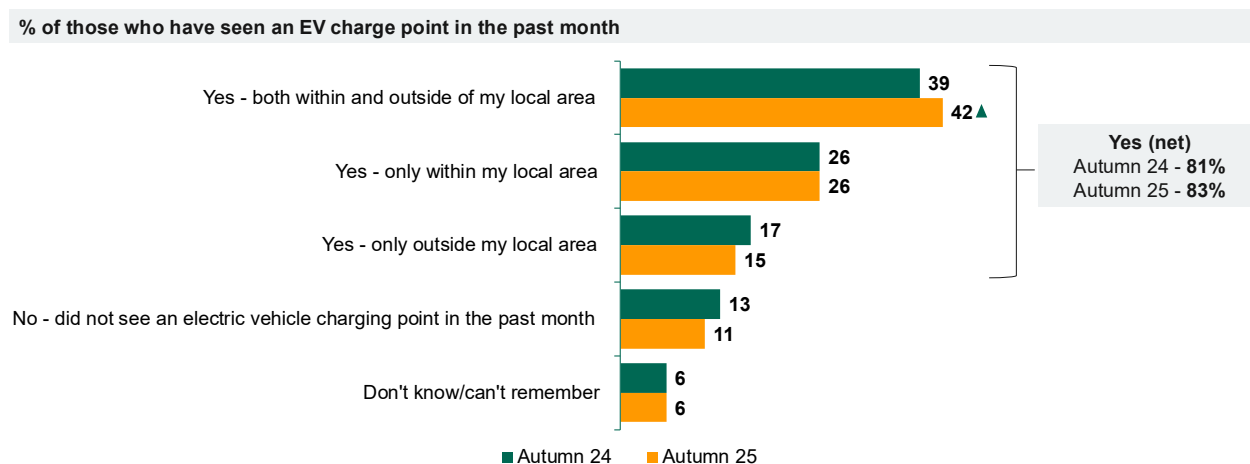
select 'less distance can be travelled on one charge' (74%) compared to people aged 16-29 (65%), 30-49 (70%) and 70+ (67%). They were also more likely to think that there are 'not enough charging points' (73%) compared to people aged 16-29 (65%), 30-49 (68%) and 70+ (68%).

- People working full-time were more likely to select a range of perceived disadvantages compared to other working types, especially people not working (excluding retired residents) and retired. For example, they were more likely to think that 'less distance can be travelled on one charge' (74%) compared to retired people (69%) and people not working (excluding retired residents) (57%).
- Rural residents were more likely to select more disadvantages on average (selected 4.3) compared to urban residents (3.9).
- People living in England regions outside of London were more likely to select more disadvantages on average (selected 4.1) compared to people living in London (selected 3.5). For example, they were more likely to think that 'less distance can be travelled on one charge' (72% compared to 55%, respectively).
- People whose main vehicle is electric/battery only were less likely to select disadvantages on average (3.1) compared to people whose main vehicle is a petrol (4.3), hybrid (4.3) and diesel (4.5).

3.5 Location of charge points

A large proportion (83%) of people recalled having seen an EV charge point in the last month, consistent with Autumn 2024 (81%), as shown in **Figure 3.4**. In Autumn 2025, two-thirds (68%) reported that they had seen one within their local area (local area was defined as within 15–20 minutes' walk or 5 minutes' drive from your home). Over two in five (42%) said they had seen one both within and outside their local area, a statistically significant increase from 39% in Autumn 2024. In contrast, 15% recalled seeing one only outside their local area.

Figure 3.4: Recalled location of charge point locations

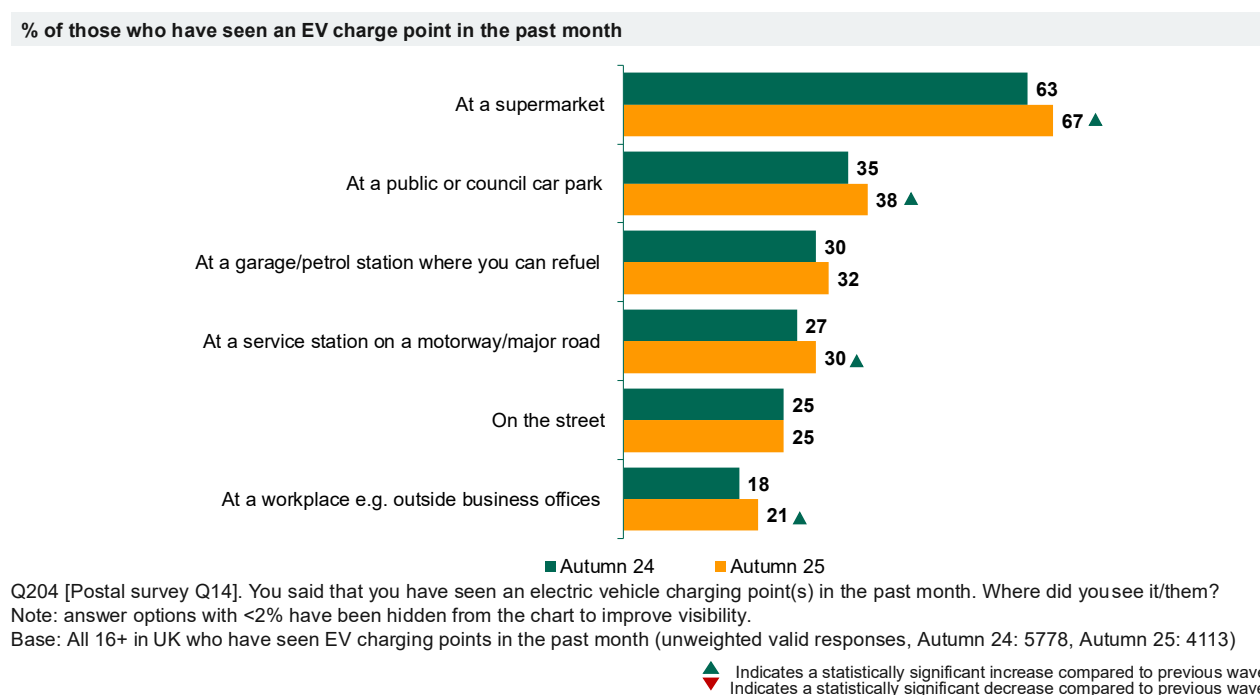


Q203 [Postal survey Q13]. Thinking back to the past month or so, did you see an electric vehicle charging point(s) in the following places or not?
Base: All 16+ in UK (unweighted valid responses, Autumn 24: 7065, Autumn 25: 4954)

▲ Indicates a statistically significant increase compared to previous wave
▼ Indicates a statistically significant decrease compared to previous wave

In Autumn 2025, the most common location people recalled seeing a charge point in the last month was at a supermarket (67%), a statistically significant increase compared to 63% in Autumn 2024, as shown in **Figure 3.5**. There was also a statistically significant increase in people recalling having seen one at a public or council car park (38%, up from 35% in Autumn 2024), at a service station on a motorway/major road (30%, up from 27% in Autumn 2024 and at a workplace e.g. outside business offices (21%, up from 18% in Autumn 2024).

Figure 3.5: Location of charge points seen



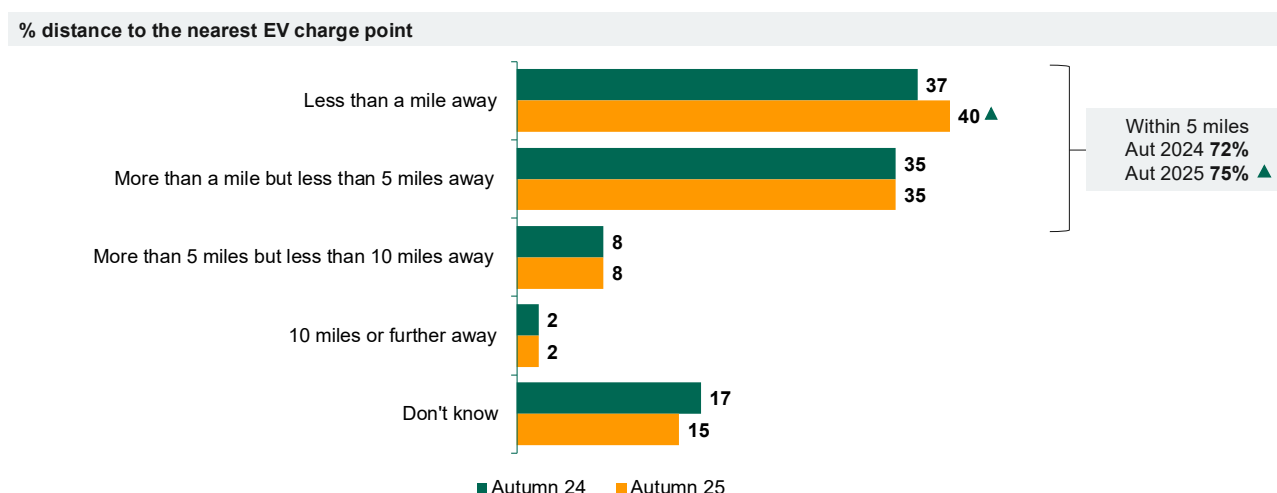
Key subgroup differences among people who had seen an EV charge point(s) in the past month:

- For several locations, men were more likely than women to have seen one. For example, they were more likely to have seen one at a garage/petrol station where you can refuel (38% compared to 26%).
- Across several locations, people aged 30–49 were more likely to have seen an EV charge point compared to older people. For example, they were more likely to have seen one at a service station on a motorway/major road (37%) compared to people aged 50–69 (29%) and 70+ (17%).
- People living in England were more likely to have seen a charge point on the street (27%) compared to people living in Northern Ireland (9%), Scotland (17%) and Wales (18%). Meanwhile people living in Scotland were more likely to have seen one at a public or council car park (56%) compared to people in Wales (32%), England (37%) and Northern Ireland (39%). People living in Wales were more likely to have seen one at a supermarket (78%) compared to people in Scotland (59%), Northern Ireland (61%) and England (67%).

- People living in South England (38%) were more likely than people in the Midlands and North England to have seen a charge point on the street (14% and 16%, respectively). People in the North (76%) were more likely than people in the Midlands and South to have seen a charge point at a supermarket (68% and 63%, respectively).

Two in five (40%) people said their nearest charge point was less than a mile away from their home, a statistically significant increase from 37% in Autumn 2024, as shown in **Figure 3.6**. Three quarters (75%) of people said the nearest one was within 5 miles of their home, also a statistically significant increase from 72% in Autumn 2024.

Figure 3.6: Estimated proximity of charge points



Q205 [Postal survey 15]. Thinking about where you live most of the time, how far away is the nearest charging point for electric vehicles – that is, a point which can be used by any member of the public wanting to charge an electric vehicle?

Base: All 16+ in UK (unweighted valid responses, Autumn 24: 7080, Autumn 25: 4966)

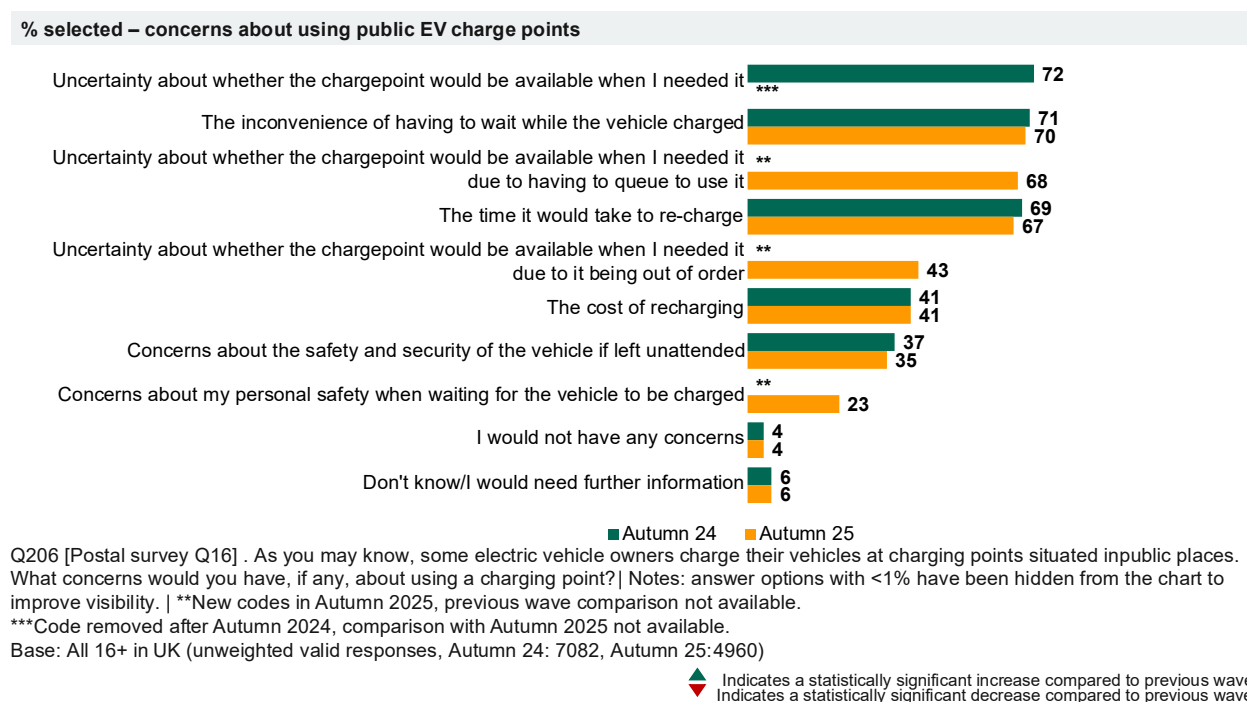
▲ Indicates a statistically significant increase compared to previous wave
▼ Indicates a statistically significant decrease compared to previous wave

- Men were more likely than women to say the nearest EV charge point was less than a mile from their home (43% compared to 39%).
- People aged 16-29 were more likely to say the nearest EV charging point was less than a mile from their home (46%) compared to people aged 50-69 (39%) and 70+ (35%).
- People living in England, Scotland and Wales were more likely to say the nearest EV charge point was less than a mile from their home (41%, 44% and 38%, respectively) compared to people living in Northern Ireland (24%).
- People living in Eastern England were more likely than most other regions in England to say their closest EV charge point was more than a 1 mile away from their home (58%, compared to 17% in London for example). People living in London, on the other hand, were more likely to say that their nearest charge point was less than a mile from their home (68%) compared to the rest of England (36%).
- Urban residents were more likely to say their nearest EV charge point was less than a mile away from their home (46%) compared to rural residents (22%). Meanwhile rural residents were more likely to say their nearest EV charge point was more than a mile away from their home (68%) compared to urban residents (38%).

3.6 Concerns about using public charge points

In Autumn 2025, 'the inconvenience of having to wait while the vehicle charged' was the most frequently selected concern about using public EV charge points (70%), in line with Autumn 2024. This was followed by 68% selecting 'uncertainty about whether the charge point would be available when I needed it due to having to queue to use it' and 67% selecting 'the time it would take to re-charge'. Note: several answer options changed between Autumn 2024 and Autumn 2025, meaning comparisons are not available for all items. All answer options from both waves are shown in **Figure 3.7**.

Figure 3.7: Concerns about using public charge points



- Men were more likely than women to be concerned about the uncertainty of whether the 'charge point would be available when they needed it due to it being out of order' (46% compared to 41%). Whereas women were more concerned than men about the 'safety and security of the vehicle if left unattended' (37% compared to 32%) and about their 'personal safety when waiting for the vehicle to be charged' (29% compared to 17%).
- People aged 50-69 were more likely to be concerned about 'the uncertainty about whether the charge point would be available when they needed it due to having to queue to use it' (75%) compared to people aged 16-29 (62%), 30-49 (68%) and 70+ (64%). Additionally, they were more concerned about 'the inconvenience of having to wait while the vehicle charged' (75%) compared to people aged 16-29 (68%), 30-49 (69%) and 70+ (67%).
- People living in Wales were more concerned about 'the uncertainty about whether the charge point would be available when they needed it due to having to queue to use it' (76%), compared to people living in Scotland (63%) and England (68%).

- People living in England regions outside of London were more concerned about a range of factors compared to people living in London. For example, they were more concerned about 'the inconvenience of having to wait while the vehicle charged' (73% compared to 58%).
- Rural residents were more likely to be concerned about a range of factors relating to using a public EV charge point compared to urban residents, including the 'time it would take to re-charge' (73% compared to 66%).

4 E-scooters

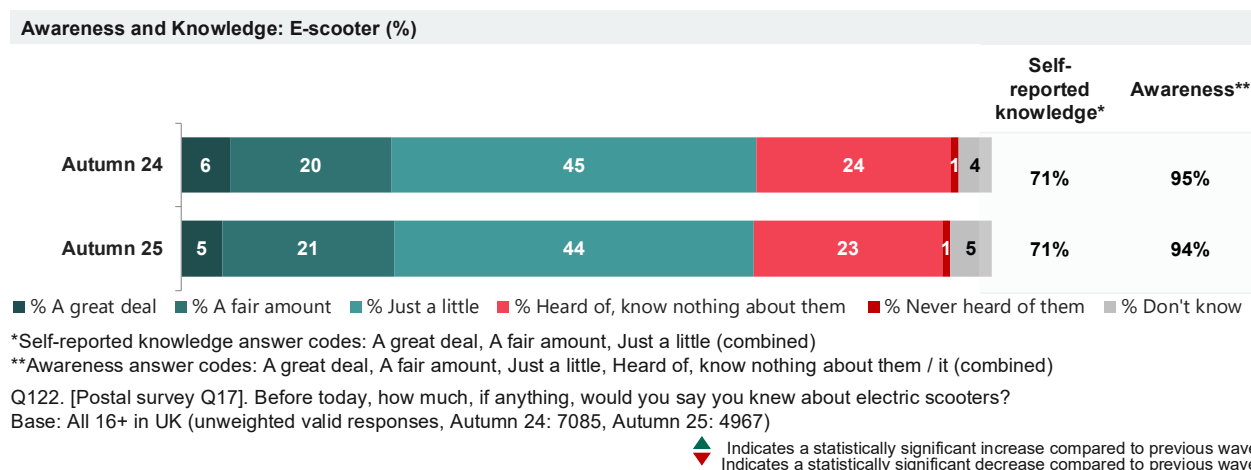
4.1 Summary

- Awareness of e-scooters was high, with almost everyone claiming they had heard of e-scooters, in line with Autumn 2024. Self-reported knowledge was lower, with seven in 10 people claiming to know at least a little about e-scooters (see section 4.2) Ownership and usage of e-scooters (privately owned and rented) was low, consistent with Autumn 2024, with almost one in ten owning one or having used one in the last 12 months (see section 4.3).
- As seen in Autumn 2024, the main reason for using an e-scooter was 'going for a ride'. Other key reasons included 'going to/from leisure activities', 'visiting friends/family' and 'going to or from work' (see section 4.4).
- The most frequently selected advantages of e-scooters were being 'quicker to get around than walking', 'convenient for short journeys' and 'environmental benefits', in line with Autumn 2024 (see section 4.6).
- The most frequently selected disadvantages of e-scooters were 'poses safety risk on busy roads', 'poses a safety risk to pedestrians' and 'users not following the law', consistent with Autumn 2024 (see section 4.7).
- In line with Autumn 2024, on average, people selected more disadvantages than advantages of e-scooters (see sections 4.6 and 4.7).
- Understanding of the rules surrounding e-scooter use was low, with less than one in ten people correctly answering all four questions about where rented and owned e-scooters can and cannot be ridden legally, consistent with Autumn 2024. Almost three in ten people did not know the answer to any of the four questions (see section 4.8).

4.2 Awareness and knowledge

In Autumn 2025, e-scooter awareness was high, with almost everyone (94%) claiming that they had heard of e-scooters, consistent with Autumn 2024, as shown in **Figure 4.1**. Self-reported knowledge was also high, with seven in 10 (71%) saying they knew a 'great deal', 'fair amount' or 'just a little' about e-scooters.

Figure 4.1: Awareness and knowledge of e-scooters



- Awareness and self-reported knowledge were high across all demographic groups.
- People aged 16-29 and 30-49 were more likely to say they know a 'great deal' or a 'fair amount' about e-scooters (34% and 29%) compared to people aged 50-69 (25%) and 70+ (17%).
- People living in England had higher self-reported knowledge (73%) compared to people living in Scotland (59%), Northern Ireland (62%) and Wales (66%).
- People living in the highest income households earning £100,000 or over per annum had higher self-reported knowledge (79%) compared to people living in households earning under £26,000 per annum (68%) and £52,000-£99,999 (73%).
- Urban residents were more likely than rural residents to say they know a 'great deal' or a 'fair amount' about e-scooters (29% compared to 22%).

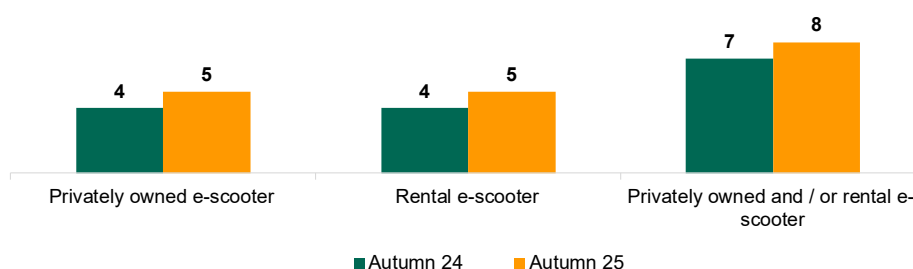
4.3 Ownership and usage

In Autumn 2025, 1% of people said they owned an e-scooter, consistent with Autumn 2024 (2%).

In the last 12 months, 5% of people had used a privately owned e-scooter. The same proportion (5%) had used a rental e-scooter over the same period, as shown in **Figure 4.2**. Almost one in 10 (8%) said they had used either a privately owned or rental e-scooter.

Figure 4.2: Frequency of use of privately owned and rental e-scooters

% used a privately owned or rental e-scooter at least once in the last 12 months



Q124 [Postal survey Q19]. How often, if at all, do you personally use a privately owned electric scooter in the UK in the last 12 months? | Base: All aged 16+ in UK (unweighted valid responses, Autumn 24: 7083, Autumn 25: 4805)

Q125 [Postal survey Q20]. How often, if at all, do you personally use a rental electric scooter in the UK?

Base: All aged 16+ in UK (unweighted valid responses, Autumn 24: 7084, Autumn 25: 4818)

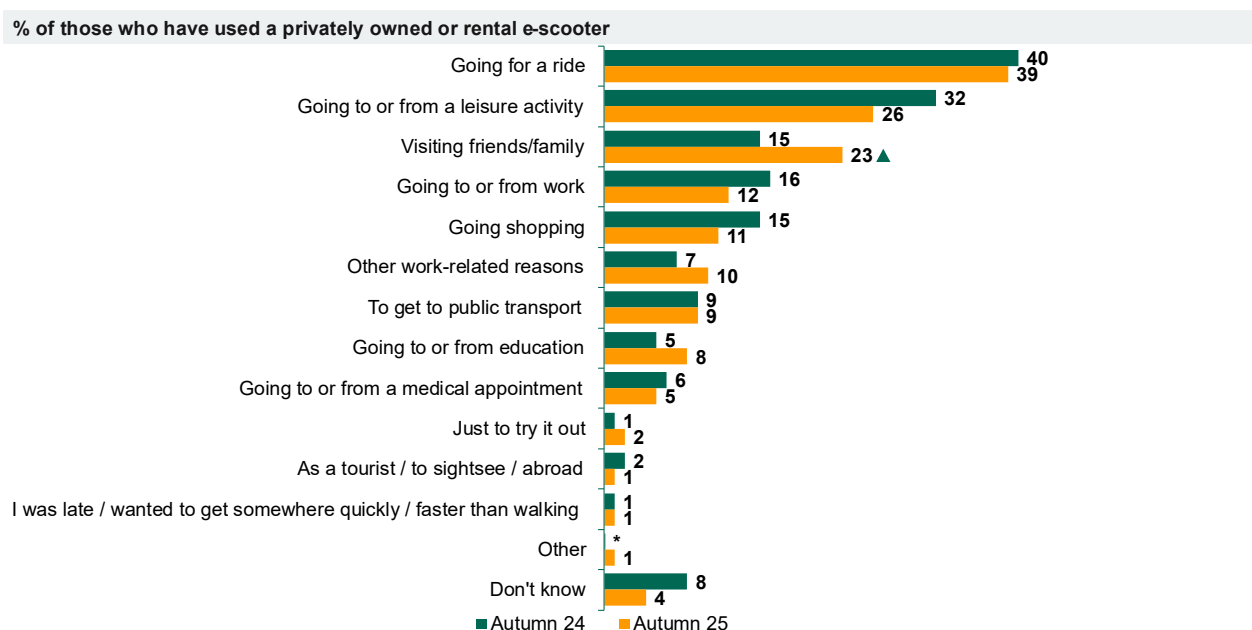
▲ Indicates a statistically significant increase compared to previous wave
▼ Indicates a statistically significant decrease compared to previous wave

- Men were more likely to say they had used a privately owned or rented e-scooter at least once in the last 12 months (6% and 7%, respectively) compared to women (3% and 4%, respectively).
- People aged 16-29 (9% and 12%, respectively) and 30-49 (7% for both) were more likely to say they have used a privately owned or rental e-scooter at least once in the last 12 months. This compared to people aged 50-69 (2% and 1%, respectively) and 70+ (1% and <1%, respectively).
- People living in Northern Ireland were more likely to say they had used a privately owned e-scooter at least once in the last 12 months (10%), compared to people living in Scotland (2%), Wales (3%) and England (5%). Meanwhile, people living in England were more likely to say they had used a rented e-scooter (6%) compared to people living in Scotland (1%) and Wales (2%).
- Urban residents were more likely to have used a privately owned or rental e-scooter at least once in the last 12 months (5% and 6%, respectively) compared to rural residents (2% and 3%, respectively).
- People who had no cars in their household were more likely to have used a privately owned e-scooter at least once in the last 12 months (8%) compared to people living in households with one car (3%) and two cars (4%).

4.4 Reason for use

People who said they had used a privately-owned or rental e-scooter were asked about their reasons for using it. The main usage reason was 'going for a ride', which was selected by 39%, consistent with Autumn 2024, as shown in **Figure 4.3**. The second most common reason was 'going to or from a leisure activity' (26%) – although this was a directional decrease from Autumn 2024 (32%), it was not statistically significant. 'Visiting friends/family' was the third most selected reason (23%), a statistically significant increase from 15% in Autumn 2024.

Figure 4.3: Reason for using e-scooters



Q209 [Postal survey Q21]. What are your reasons for using an e-scooter?

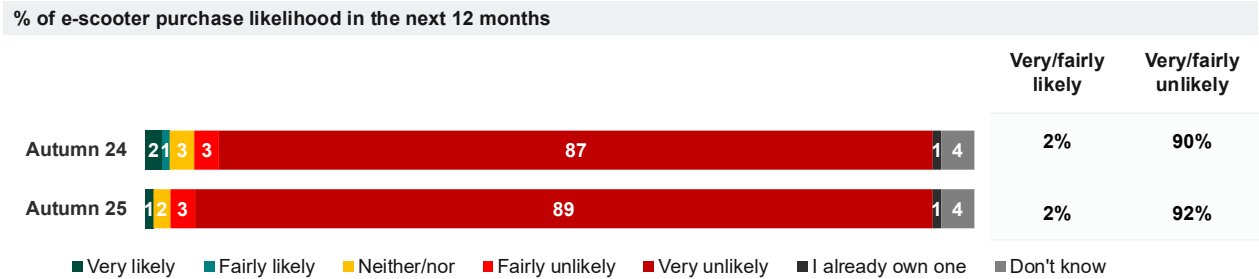
Base: All 16+ in UK who have used a privately owned or rental e-scooter (unweighted valid responses, Autumn 24: 497, Autumn 25: 257) | Base sizes were too small for full subgroup analysis.

▲ Indicates a statistically significant increase compared to previous wave
▼ Indicates a statistically significant decrease compared to previous wave

4.5 Purchase intention

In total, 2% of people said they would be ‘very likely’ or ‘fairly likely’ to purchase an e-scooter in the next 12 months, consistent with Autumn 2024. In contrast, just over nine in 10 (92%) said they were ‘very unlikely’ or ‘fairly unlikely’ to, as shown in **Figure 4.4**.

Figure 4.4: Purchase intention of e-scooters



Q210 [Postal survey Q22] . How likely or unlikely are you to purchase an e-scooter in the next 12 months?
Base: All 16+ in UK (unweighted valid responses, Autumn 24: 7075, Autumn 25: 4957)

▲ Indicates a statistically significant increase compared to previous wave
▼ Indicates a statistically significant decrease compared to previous wave

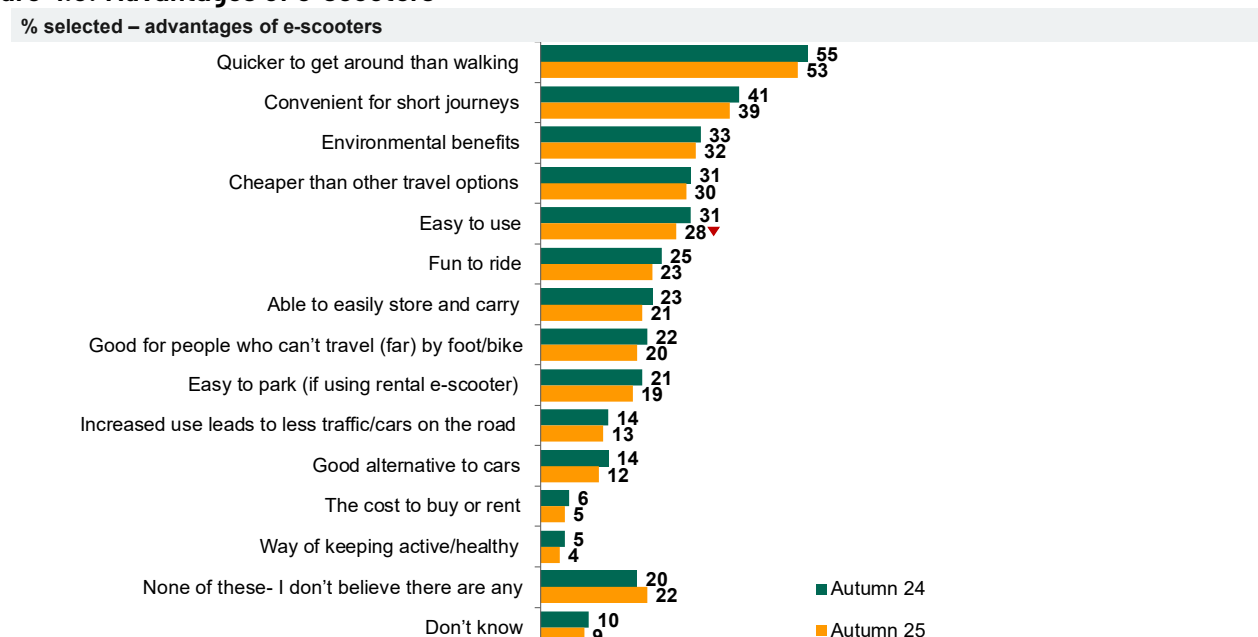
- People living in London were more likely (‘very likely’ or ‘fairly likely’) to say they would purchase an e-scooter in the next 12 months (3%) than people living in all other regions in England (1%)
- Similarly, people living in households earning up to £25,999 were more likely (‘very likely’ or ‘fairly likely’) to say they would purchase an e-scooter in the next 12 months (3%) compared to people living in households earning between £52,000–£99,999 and £100,000 and above per annum (both 1%).
- People with no cars/vans in their household were more likely (‘very likely’ or ‘fairly likely’) to say they would purchase an e-scooter in the next 12 months (4%) compared to people in living in households with one car/van (2%), two cars/vans (1%) and three or more cars/vans (1%).

4.6 Advantages – prompted

When shown a list of potential advantages of e-scooters, the most frequently selected advantage was 'quicker to get around than walking' (53%), as in **Figure 4.5**. This was followed by 'convenient for short journeys' (39%) and 'environmental benefits' (32%). While the three most frequently selected advantages were consistent between Autumn 2024 and Autumn 2025, the proportion of people selecting 'easy to use' as an advantage saw a statistically significant decrease from 31% in Autumn 2024 to 28% in Autumn 2025.

On average, people selected three advantages of e-scooters in Autumn 2025, consistent with Autumn 2024.

Figure 4.5: Advantages of e-scooters



Q127 [Postal Survey Q23]: Which of the following, if any, do you think are advantages of electric scooters?

Note: answer options with <2% have been hidden from the chart to improve visibility.

Base: All 16+ in UK (unweighted valid responses, Autumn 24: 7073, Autumn 25: 4947)

▲ Indicates a statistically significant increase compared to previous wave
▼ Indicates a statistically significant decrease compared to previous wave

- For several perceived advantages of e-scooters, young people aged 16-29 were more likely than older people to select these. For example, people aged 16-29 were more likely than people aged 50+ to say e-scooters are 'quicker to get around than walking' (66% compared to 45%).
- For several perceived advantages, higher income households (earning £52,000 and above per annum) were more likely than people living in the lowest income households (earning up to £25,999 per annum) to select them. For example, they were more likely to think that e-scooters are 'quicker to get around than walking' (61% compared to 47%), 'convenient for short trips' (45% compared to 31%) and they are 'cheaper than other travel options' (34% compared to 26%).

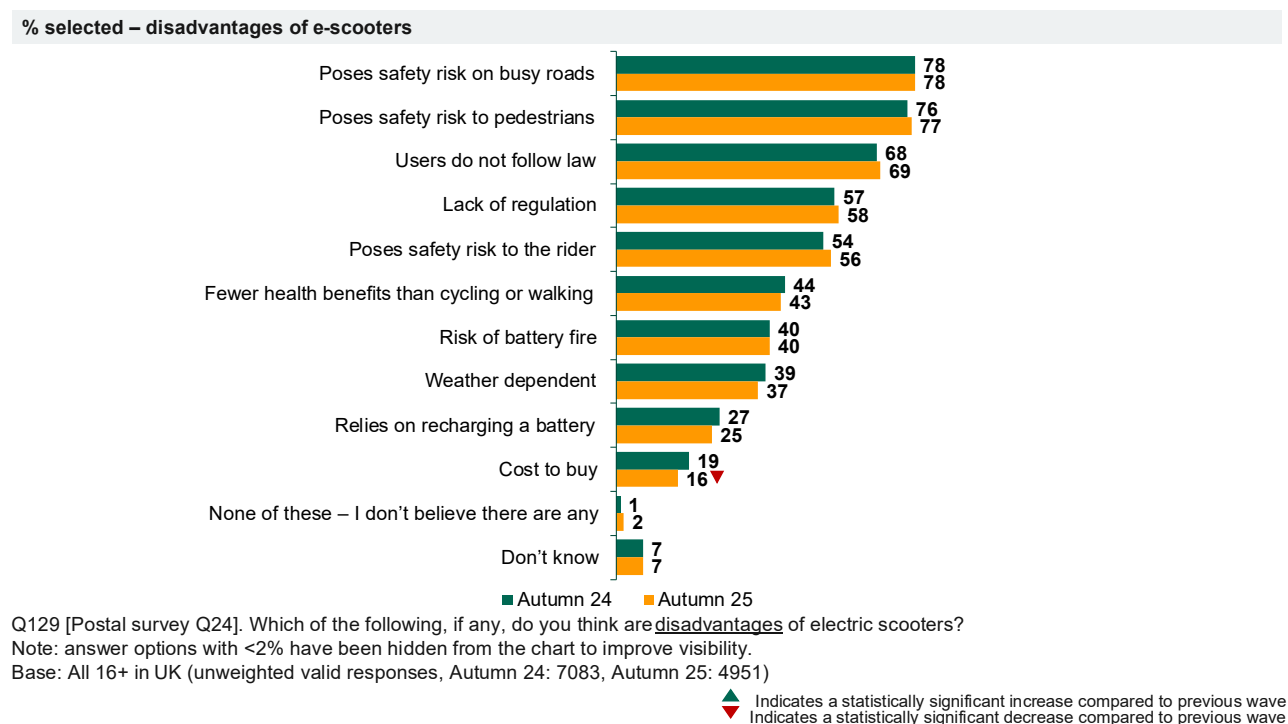
- For several perceived advantages, urban residents were more likely to select these compared to rural residents. For example, they were more likely to select the 'environmental benefits' (32% compared to 29%).
- People living in England were more likely than people living in Scotland to say e-scooters are 'quicker to get around than walking' (54% compared to 46%) and they are 'convenient for short journeys' (40% compared to 31%).

4.7 Disadvantages – prompted

When shown a list of potential disadvantages of e-scooters, the most frequently selected disadvantage was 'poses a safety risk on busy roads' (78%), as in **Figure 4.6**. This was followed by 'poses a safety risk to pedestrians' (77%) and 'users do not follow the law' (69%). While the proportion of people who selected each disadvantage was relatively consistent between Autumn 2024 and Autumn 2025, the proportion of people selecting 'cost to buy' as a disadvantage saw a statistically significant decrease from 19% in Autumn 2024 to 16% in Autumn 2025.

On average, people selected five disadvantages of e-scooters in Autumn 2025, consistent with Autumn 2024. This was compared to three advantages on average selected in Autumn 2025.

Figure 4.6: Disadvantages of e-scooters



- Men were more likely than women to think that e-scooter 'users do not follow the law' (72% compared to 67%) and there are 'fewer health benefits than cycling or walking' (46% compared to 40%).
- For several perceived disadvantages, people aged 50-69 were more likely to select these than other age groups. For example, people aged 50-69 were more likely to select they 'pose

a safety risk on busy roads' (84%) and 'pose a safety risk to the rider' (64%) compared to people aged 16-29 (72% and 49%, respectively), 30-49 (78% and 58%, respectively) and 70+ (76% and 48%, respectively).

- For several perceived disadvantages, people living in households earning £52,000 and above per annum were more likely than people living in households earning up to £25,999 to select them. Some of these differences included e-scooters 'pose a safety risk to pedestrians' (81% compared to 71%), and 'users do not follow the law' (75% compared to 64%).
- Rural residents were more likely than urban residents to think that there are 'fewer health benefits than cycling or walking' (47% compared to 41%), they are 'weather dependent' (40% compared to 36%) and they 'rely on recharging a battery' (28% compared to 24%).
- People living in England were more likely to select 'lack of regulation' (58%) and 'fewer health benefits than cycling or walking' (42%) compared to people living in Northern Ireland (49% and 34%, respectively). People living in Wales were more likely than people living in Northern Ireland to select they 'pose a safety risk to pedestrians' (80% compared to 71%). They were also more likely compared to people living in Scotland and Northern Ireland to select 'risk of battery fire' (47% compared to 33% for both). People living in Scotland were more likely to select 'weather dependent' (43%) compared to people living in England (36%).

4.8 Understanding rules about e-scooters

People were shown a set of four statements relating to rules about e-scooter use in the UK and asked if they believed each of them to be true or false (Table 4.1).

Table 4.1: Statements relating to rules about e-scooters in the UK

	Correct answer
If you own an e-scooter, you are legally allowed to ride it on pavements and footpaths	False
If you own an e-scooter, you are legally allowed to ride it on roads and cycle lanes	False
If you hire an e-scooter, you are legally allowed to ride it on pavements and footpaths	False
If you hire an e-scooter, you are legally allowed to ride it on roads and cycle lanes	True

In Autumn 2025, the proportion of people who responded correctly to all four statements around e-scooter usage was low (8%), with around three in ten (28%) not knowing the correct answer to any of the four statements. This was consistent with the Autumn 2024 findings.

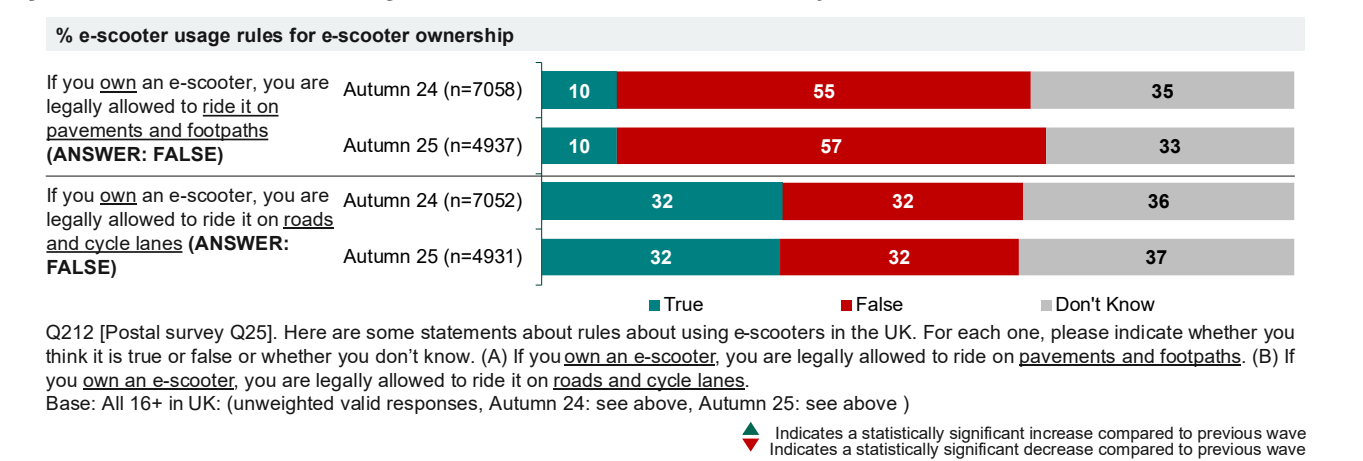
In Autumn 2025, more than half (57%) of people were **correct** in stating that it is illegal to ride a privately owned e-scooter on pavements and footpaths, consistent with Autumn 2024 (55%), as shown in Figure 4.7.

- However, a quarter of people aged 16-29 (17%) **incorrectly** thought e-scooter owners can legally ride on pavements and footpaths, significantly more than older age groups, for example 6% of people aged 70+.

Nearly one in three (32%) people were **correct** in stating that it is illegal to ride a privately owned e-scooter on roads and cycle lanes, in line with Autumn 2024 (32%). The same proportion of people (32%) **incorrectly** thought e-scooter owners could legally ride on roads and cycle lanes.

- A higher proportion of people aged 16-29 (43%) **incorrectly** thought e-scooter owners can legally ride on roads and cycle lanes than older age groups, for example 25% of people aged 70+.

Figure 4.7: Statements relating to rules about the use of privately owned e-scooters



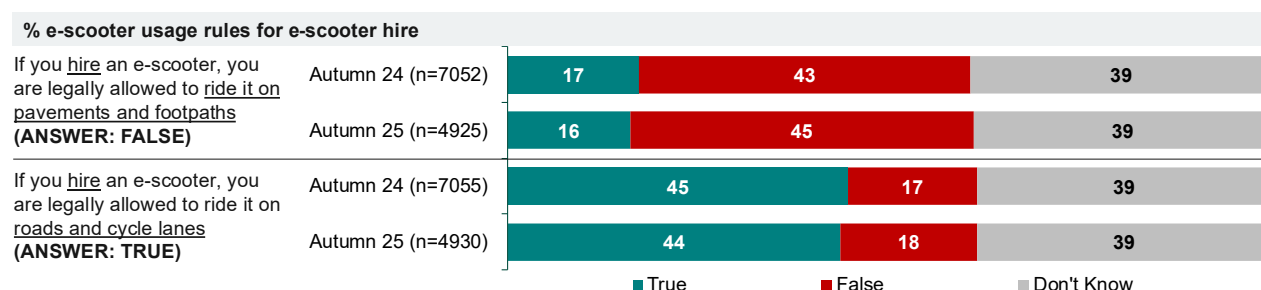
Just over two fifth (45%) of people were **correct** in answering that it is illegal to ride a rental scooter on a pavement or footpath, consistent with Autumn 2024 (43%) as shown in **Figure 4.8**. A similar proportion (39%) answered 'don't know' and one in six (16%) incorrectly thought it was legal.

- The proportion who **incorrectly** thought rental e-scooters can legally be ridden on pavements and footpaths was higher among people aged 16-29 (24%) compared to older age groups. For example, 11% of people aged 70+ thought this.

Just over two fifth (44%) of people were **correct** in answering that riding a rental e-scooter on roads and cycle lanes is legal. Almost two in five (39%) answered 'don't know' and one in six (18%) **incorrectly** thought it was illegal.

- Men were more likely than women to **correctly** answer that riding a rental e-scooter on roads and cycle lanes is legal (49% compared to 39%).
- People living in England were more likely to **correctly** answer that riding a rental e-scooter on roads and cycle lanes is legal (46%) compared to residents living in Scotland (29%), Northern Ireland (31%) and Wales (34%).
- People living in higher income households were more likely to **correctly** answer that riding a rental e-scooter on roads and cycle lanes is legal (50% of those earning between £52,000 - £99,999 per annum and 54% of those earning £100,000 or more per annum) compared to people living in lower income households (40% of those earning up to £25,999 per annum).

Figure 4.8: Statements relating to rules about the use of rental e-scooters



Q212 [Postal survey Q25]. Here are some statements about rules about using e-scooters in the UK. For each one, please indicate whether you think it is true or false or whether you don't know. (C) If you hire an e-scooter, you are legally allowed to ride on pavements and footpaths. (D) If you hire an e-scooter, you are legally allowed to ride it on roads and cycle lanes.

Base: All 16+ in UK: (unweighted valid responses, Autumn 24: see above, Autumn 25: see above)

▲ Indicates a statistically significant increase compared to previous wave
▼ Indicates a statistically significant decrease compared to previous wave

5 E-cycles

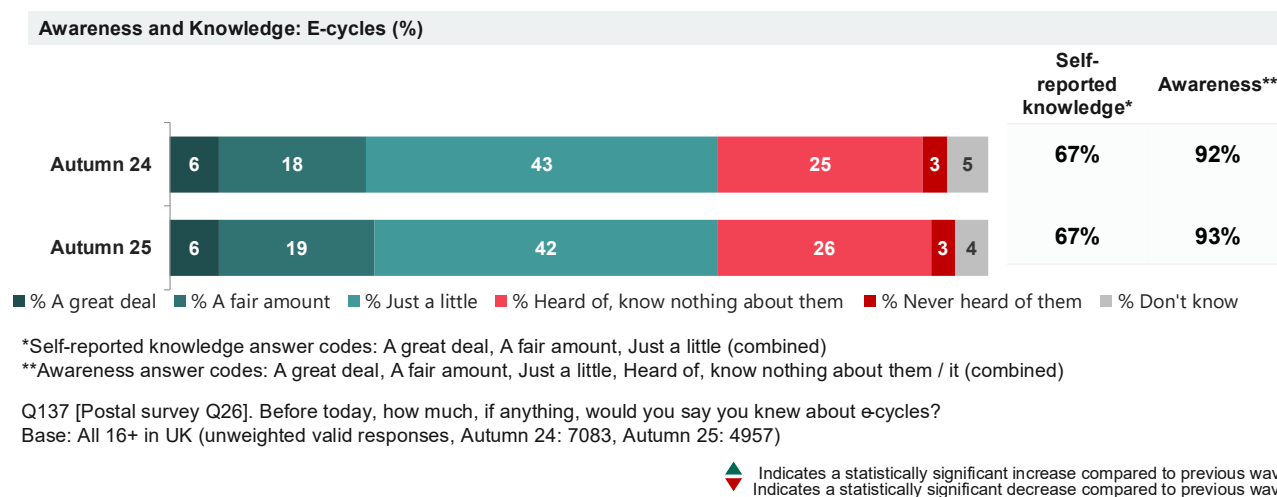
5.1 Summary

- Awareness of e-cycles was high in Autumn 2025, in line with Autumn 2024. Self-reported knowledge was the lowest of the three technologies covered by this survey wave, with two-thirds of people claiming to know at least a little about e-cycles (see section 5.2).
- Usage of e-cycles was low, with just over one in ten having used one in the last 12 months, a statistically significant increase from Autumn 2024. In comparison, one-third reported using a standard cycle at least once during the same period, in line with Autumn 2024 (see section 5.3).
- As seen in Autumn 2024, in Autumn 2025 intention to purchase an e-cycle in the next 12 months was low, with the majority saying it is very unlikely. The likelihood of using e-cycle share schemes, however, was higher than purchase intention, but still low overall (see section 5.4).
- The most frequently selected advantage of e-cycles was that 'they require less effort than a normal bike' followed by 'environmental benefits' and 'can travel further than a normal bike', in line with Autumn 2024 (see section 5.5).
- The most frequently selected disadvantage of e-cycles was 'they are expensive to buy', followed by a belief that they are 'likely to be stolen' and the 'risk of battery fire', in line with Autumn 2024 (see section 5.6).
- On average, people selected a similar number of advantages and disadvantages to e-cycles, consistent with Autumn 2024 (see sections 5.5 and 5.6).

5.2 Awareness and knowledge

Awareness of e-cycles was high in Autumn 2025 (93%), consistent with Autumn 2024 (92%), as shown in **Figure 5.1**. Self-reported knowledge was also relatively high, with two-thirds (67%) of people claiming to know 'a great deal', 'fair amount' or 'just a little' about e-cycles.

Figure 5.1: Awareness and knowledge of e-cycles



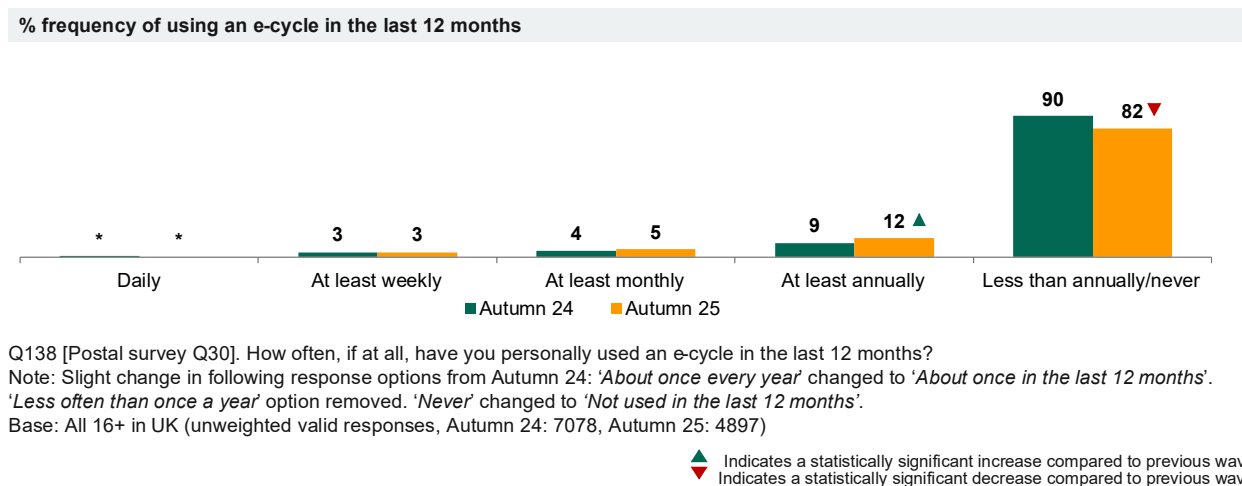
- Awareness of e-cycles was high across all subgroups.
- Men were more likely to be aware of e-cycles (95%) and had higher self-reported knowledge (76%) compared to women (92% and 59%, respectively).
- People aged 30-49 and 50-69 had higher levels of awareness of e-cycles (94% for both) compared to people aged 16-29 (90%). However, people aged 16-29, 30-49 and 50-69 had higher levels of self-reported knowledge (70%, 68% and 70%, respectively) compared to people aged 70+ (58%).
- People living in Wales and England were more likely to be aware of e-cycles (97% and 93%, respectively) compared to people living in Northern Ireland (89%). Whilst people living in England and Scotland had similar levels of awareness (93% and 92%, respectively), people living in Wales were more likely than people living in Scotland to be aware of e-cycles.

5.3 Ownership and usage

In Autumn 2025, 4% of people said they owned an e-cycle, consistent with Autumn 2024.

Use of e-cycles was low, with 12% of people having used one at least once in the last 12 months, as seen in **Figure 5.2**. Whilst usage remains low, there was a statistically significant increase from 9% in Autumn 2024.

Figure 5.2: Usage of e-cycles

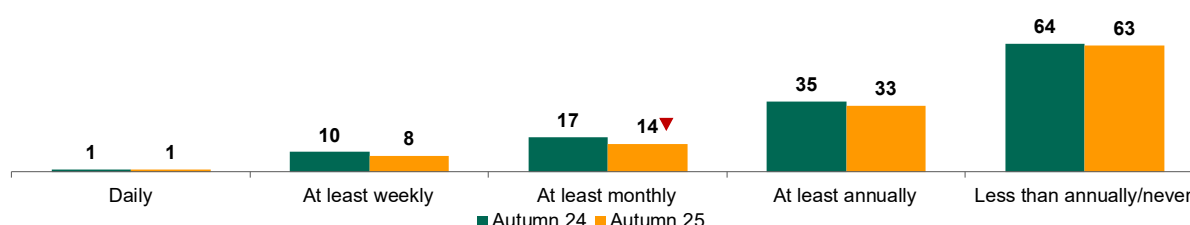


- Men were more likely to have used an e-cycle at least once a year (15%) compared to women (9%).
- People aged 16-29 were more likely to have used an e-cycle at least once a year (17%) compared to people aged 30-49 (13%), 50-69 (10%) and 70+ (5%).
- People living in England were more likely to have used an e-cycle at least once a year (12%) compared to people living in Wales (6%).
- People living in London were more likely to have used an e-cycle at least once a year (22%) compared to people living in all other regions in England (11%), with the next highest being in the South West (14%) and South East (13%).
- People in the highest income households earning £100,000 and above per annum were more likely to have used an e-cycle at least once a year (21%) compared people living in lower income households earning up to £25,999 per year (9%), £26,000-£51,999 (12%) and £52,000-£99,999 (10%).
- People living in households with no cars/vans were more likely to have used an e-cycle at least once a year (15%) compared to people in households with one car/van (11%) and two cars/vans (11%).

Use of standard cycles over the last 12 months was higher than e-cycle usage, with one third (33%) saying that they used a standard cycle at least once, as shown in **Figure 5.3**. However, there was a statistically significant decrease in people who had used one at least monthly (14% down from 17% in Autumn 2024).

Figure 5.3: Usage of standard cycles

% frequency of using a standard cycle in the last 12 months



Q215 [Postal survey Q31]. How often, if at all, have you personally used a standard cycle (e.g. a push bike) in the last 12 months?

Note: Slight change in following response options from Autumn 24: 'About once every year' changed to 'About once in the last 12 months'. 'Less often than once a year' option removed. 'Never' changed to 'Not used in the last 12 months'.

Base: All 16+ in UK (unweighted valid responses, Autumn 24: 7079, Autumn 25: 4916)

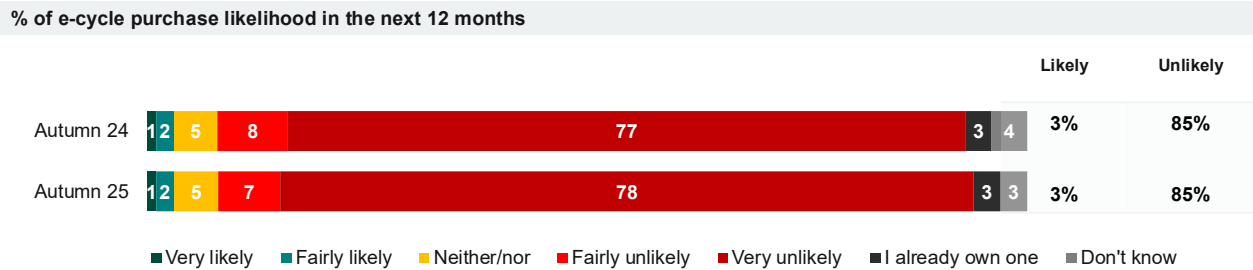
▲ Indicates a statistically significant increase compared to previous wave
▼ Indicates a statistically significant decrease compared to previous wave

- People aged 16-29 were more likely to have used a standard cycle **at least annually** (40%) compared to people aged 50-69 (33%) and 70+ (15%). People aged 70+ were more likely than all other age groups to have not used a standard cycle in the last 12 months (80% compared to people aged 16-29 (54%), 30-49 (59%) and 50-69 (63%).
- People living in Eastern England and London were more likely to have used a standard cycle **at least monthly** (22% and 19%, respectively) compared to people living in all other regions of England (11%).
- People living in the highest income households (earning £100,000 or above per annum) were more likely to have used a standard cycle **at least monthly** (28%) compared to people living in lower income households (earning up to £25,999 per annum, 9%), £26,000 – £51,999 per annum (16%) and £52,000 – £99,999 per annum (14%).
- People living in households with no cars/vans were more likely to have used a standard cycle **at least weekly** (12%) compared to people living in households with one car/van (8%), two cars/vans (7%). Whereas people living in households with three or more cars/vans were more likely to have used one at least annually (39%) compared to people living in households with no cars/vans (28%) and one car/van (29%).

5.4 Purchase intention and use of schemes

Intention to purchase an e-cycle in the next 12 months was low, with 3% saying it is ‘very likely’ or ‘fairly likely’, consistent with Autumn 2024 (3%). The majority (78%) said it is ‘very unlikely’, as shown in **Figure 5.4**.

Figure 5.4: Purchase intentions of e-cycles



Q214 [Postal survey Q29]. How likely or unlikely are you to purchase an e-cycle in the next 12 months?
Base: All 16+ in UK (unweighted valid responses, Autumn 24: 7077, Autumn 25: 4949)

▲ Indicates a statistically significant increase compared to previous wave
▼ Indicates a statistically significant decrease compared to previous wave

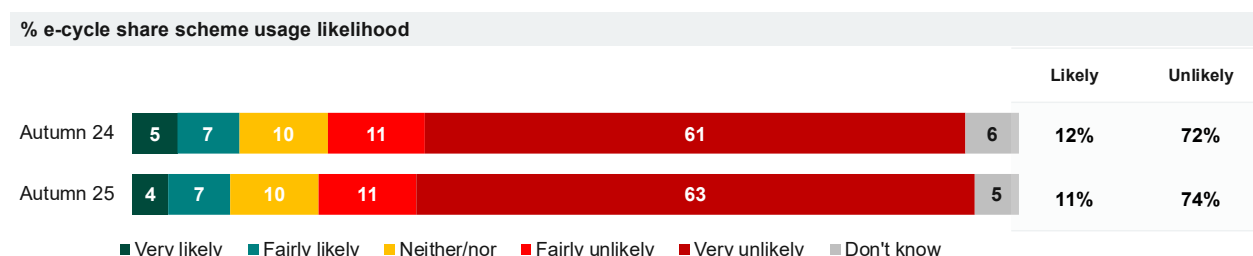
- Men were more likely (‘very likely’ or ‘fairly likely’) to say they would purchase an e-cycle in the next 12 months (5%) compared to women (2%).
- People aged 16-29, 30-49 and 50-69 were more likely (‘very likely’ or ‘fairly likely’) to say they would purchase an e-cycle in the next 12 months (4%, 3% and 4%, respectively) compared to people aged 70+ (1%).
- People living in London and the East Midlands were more likely (‘very likely’ or ‘fairly likely’) to say they would purchase an e-cycle in the next 12 months (6% for both) compared to people living in Yorkshire and The Humber (1%) and West Midlands (2%).
- People living in households with no cars or vans were more likely (‘very likely’ or ‘fairly likely’) to say they would purchase an e-cycle in the next 12 months (6%) compared to people living in households with one cars or vans and two cars or cans (3% for both).

Respondents were provided with the following text about an e-cycle share scheme before being asked about their likelihood of using such a scheme:

“An e-cycle share scheme is a service that allows people to pay to hire an e-cycle by collecting it from a “docking” point such as a bike rack or a “dockless” location such as a pavement or where it has been left by previous users. This could involve share schemes that are available to anyone, or they could be targeted share schemes that are available to employees in a workplace, or community groups.”

Consistent with Autumn 2024, in Autumn 2025, people were more likely (‘very likely’ or ‘fairly likely’ to say they would use an e-cycle scheme compared to purchasing an e-cycle in the next 12 months (11% compared to 3%), as shown in **Figure 5.5** and **Figure 5.4**. Almost two thirds (63%) said it is ‘very unlikely’ that they would use an e-cycle scheme.

Figure 5.5: Likelihood of using e-cycle schemes



Q216B [Postal Survey Q34]. How likely or unlikely would you be to use an e-cycle share scheme if it was available in your area?

Base: All 16+ in UK (unweighted valid responses, Autumn 24: 7075, Autumn 25: 4951)

▲ Indicates a statistically significant increase compared to previous wave
▼ Indicates a statistically significant decrease compared to previous wave

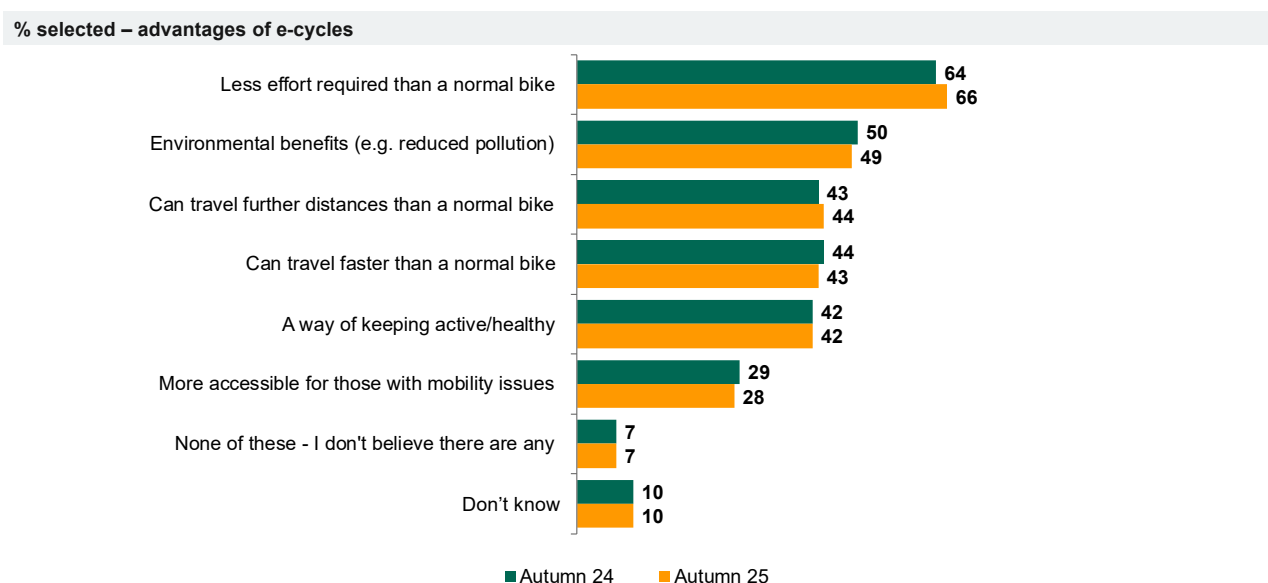
- People aged 16-29 and 30-49 were more **likely** (‘very likely’ or ‘fairly likely’) to say they would participate in an e-cycle sharing scheme in their local area (18% and 13% respectively) compared to people aged 50-69 (7%) and 70+ (3%). Older people aged 50-69 and 70+ were more likely to say they were very unlikely to participate (69% and 86%) compared to people aged 16-29 (46%) and 30-49 (56%).
- People living in London were more **likely** (‘very likely’ or ‘fairly likely’) to participate in an e-cycle sharing scheme in their local area (16%) compared to people living in other regions in England (10%).
- Women were more likely than men to say they are ‘**very unlikely**’ to participate in an e-cycle sharing scheme in their local area (66% compared to 60%).
- People living in Wales were more likely to say they are ‘**very unlikely**’ to participate in an e-cycle sharing scheme in their local area (75%) compared to people living in Northern Ireland (58%), England (62%) and Scotland (64%).

5.5 Advantages – prompted

In Autumn 2025, the most frequently selected advantage of e-cycles was 'less effort required than a normal bike' (66%), as shown in **Figure 5.6**. The next most selected advantages were 'environmental benefits (e.g. reduced pollution)' (49%), 'can travel further distances than a normal bike' (44%), 'can travel faster than a normal bike' (43%) and 'a way of keeping active/healthy' (42%). Findings were consistent with Autumn 2024.

On average, people selected three advantages of e-cycles, consistent with Autumn 2024.

Figure 5.6: Advantages of e-cycles



Q140 [Postal Survey 32]. Which of the following, if any, do you think are advantages of e-cycles?

Note: answer options with <1% have been hidden from the chart to improve visibility.

Base: All 16+ in UK (unweighted valid responses, Autumn 24: 7082, Autumn 25: 4955)

▲ Indicates a statistically significant increase compared to previous wave
▼ Indicates a statistically significant decrease compared to previous wave

- People aged 50-69, were more likely to think that 'less effort is required than a normal bike' (72%) compared to people aged 16-29 (66%), 30-49 (63%) and 70+ (61%). People aged 16-29 and 30-49 were more likely to think that 'they can travel further distances than a normal bike' (50% and 48%) compared to people aged 50-69 (42%) and 70+ (33%). They were also more likely to think that 'they can travel faster than a normal bike' (54% and 47%) compared to people aged 50-69 (40%) and 70+ (28%).
- People living in South England were more likely than people in North England to select 'less effort required than a normal bike' (69% compared to 63%) and 'can travel further distances than a normal bike' (47% and 39%). They were also more likely than people in North England and the Midlands to select the 'environmental benefits' (53% compared to 46% for both).
- Rural residents were more likely than urban residents to think that they 'can travel further distances than a normal bike' (48% compared to 43%) and that e-cycles are 'more accessible for those with mobility issues' (31% compared to 27%).

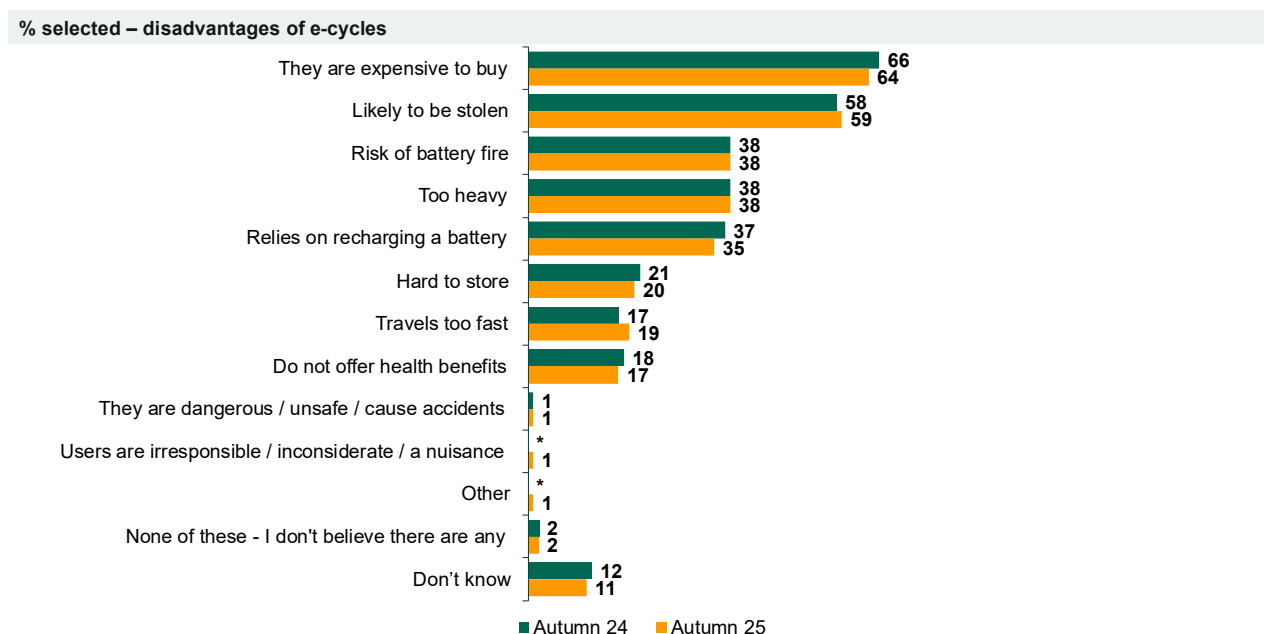
- People working full-time were more likely to think that 'less effort is required than a normal bike' (70%) compared to people who were retired (65%) and not working (excluding retired residents) (56%). They were also more likely to think that they 'can travel further distances than a normal bike' (50% compared to 35% and 37%, respectively) and they are 'a way of keeping active/healthy' (46% compared to 34% and 36%, respectively).
- People who have used an e-cycle at least once in the last 12 months were more likely to select more advantages on average (3.6) compared to people who had not used an e-cycle in the last 12 months (2.7).

5.6 Disadvantages – prompted

In line with the Autumn 2024, in Autumn 2025 the most frequently selected disadvantage of e-cycles were 'they are expensive to buy' (64%), they are 'likely to be stolen' (59%), 'risk of battery fire' (38%), 'too heavy' (38%) and 'relies on recharging a battery' (35%), as shown in **Figure 5.7**.

On average people selected three disadvantages, which was consistent with Autumn 2024.

Figure 5.7: Disadvantages of e-cycles



Q142 [Postal Survey 33]. Which of the following, if any, do you think are disadvantages of e-cycles?

Note: answer options with <1% have been hidden from the chart to improve visibility.

Base: All 16+ in UK (unweighted valid responses, Autumn 24: 7080), Autumn 25: 4955)

▲ Indicates a statistically significant increase compared to previous wave
▼ Indicates a statistically significant decrease compared to previous wave

- Men were more likely than women to select several perceived disadvantages. For example, they were more likely to think e-cycles are 'expensive to buy' (67% compared to 62%) and 'likely to be stolen' (62% compared to 57%).
- Young people aged 16-29 were also more likely to select the disadvantage of e-cycles being 'likely to be stolen' (68%) compared to people aged 30-49 (60%), 50-69 (58%) and 70+ (48%).

They were also more likely to select that they are 'hard to store' (26%) compared to people aged 50-69 (19%) and 70+ (13%).

- People living in the highest income households were more likely to select certain disadvantages than people living in the lowest income households. For example, people living in households earning between £52,000-£99,999 and £100,000 and above per annum were more likely to select e-cycles are 'expensive to buy' (72% and 68%, respectively) compared to people living in households earning up to £25,999 (59%).
- Rural residents were more likely than urban residents to select a disadvantage that e-cycles are 'expensive to buy' (71% compared to 63%, respectively) and the 'risk of battery fire' (42% compared to 37%). Urban residents were more likely to think that they 'travel too fast' (20%) compared to rural residents (16%).

6 Appendix

6.1 Methodology

The Department for Transport (DfT) commissioned Ipsos to undertake a series of surveys to measure public awareness, attitudes and behaviours in relation to existing and emerging transport technologies, aiming to:

- Fill gaps in knowledge about what the public know and think via a survey representative of those aged 16+ living in the UK; and
- Identify and analyse differences between population subgroups.

The methodology implemented from the Autumn 2024 wave employed a UK-wide, push-to-web methodology with a postal option, which continued into the Autumn 2025 wave. The Autumn 2025 wave reached a sample size of 4,976 individuals (unweighted). This approach, implemented from Autumn 2024, prioritises gathering data from a fresh sample of participants each wave, minimising potential bias and providing a current snapshot of public opinion.

Methodologies used for Transport Technology Tracker:

- Waves 1-5 (2017-2020): Biannual face-to-face omnibus surveys. Due to the Coronavirus pandemic, the survey moved to an online methodology for Wave 6 (August 2020), with a small number of respondents interviewed over the phone.
- Waves 7-11 (2020-2023): Online surveys using Ipsos' KnowledgePanel.
- Waves 12, 13 and 14 (Autumn 2024, Spring 2025 and Autumn 2025): UK-wide, push-to-web methodology.

All previous wave data can be found here:

<https://www.gov.uk/government/publications/transport-and-transport-technology-public-attitudes-tracker>

The differences in sample composition and measurement mode introduced in Autumn 2024 make comparisons with the first 11 waves inadvisable and as such this report does not include any analysis comparing findings to earlier waves. This report will therefore focus on the findings from this Autumn 2025 wave and any repeat questions from the Spring 2025 and Autumn 2024 waves, offering valuable insights into current public perceptions of transport technology across the UK.

A representative sample of 4,976 (unweighted) adults aged 16+ across the UK completed the survey between 16th October and 27th November 2025 during the Autumn 2025 wave. Up to two adults (aged 16+) from 17,000 households across the UK were invited to participate in the survey. Participants from across 3,562 households took part, achieving a household response rate of 21% (unweighted).

These data were collected using a UK-wide, push-to-web methodology with a postal survey option. This approach randomly sampled addresses from the Postcode Address File (PAF) and invited residents to participate online. A reminder letter was sent to those who had not responded to the survey online within the first few weeks of the fieldwork. Half of the reminder letters included two paper questionnaires to ensure the inclusion of digitally excluded respondents, whilst the other half of the reminders included another online survey invitation. Paper questionnaires were also available upon request throughout the entire fieldwork period. A total of 4,027 (unweighted) participants completed the survey online, and 949 (unweighted) participants completed the paper survey.

Data were weighted by age, gender, region, deprivation quintile, highest level of education, ethnicity and number of adults in the household to reflect the profile of the population. Population profiles were based on data from ONS 2022 mid-year population estimates, the ONS Annual Population Survey 2022-2023 and Census 2021.

This report focuses on the following demographic groups: gender, age, region, urbanity, working status and household income based on the following categories: up to £25,999, £26,000-£51,999, £52,000-£99,999, £100,000+.

Subgroup differences were assessed using Quantum, a well-established, industry-standard tabulation software for market and social research. Statistical significance was evaluated using the proportions/means: columns tested at a 5% risk level (95% confidence). For weighted data, standard errors were based on effective sample size (design-effect adjusted) calculated using the Kish formula. Reporting focuses on a limited set of priority subgroups and highlights only differences identified by this criterion test that are meaningful in context where the effective base size was greater than 100.

To ensure all findings reported are of meaningful significance, a threshold has been established where only statistically significant differences of at least 3 percentage points are highlighted. Statistically significant differences below this threshold are flagged within the data tables but are excluded from the narrative analysis in this report. This practice aims to prioritise meaningful analysis when reporting subgroup differences and differences between waves.

Commentary focuses on statistically significant differences between sub-groups in the same category (e.g. different age groups). Lack of reference to other groups and geographies does not mean there are not statistically significant differences – for example, men's claimed levels of awareness and knowledge tend to be higher than women's, and there are some differences between regions. Data tables of the full Autumn 2025 wave dataset are published alongside this report.

The total sum of answer codes may appear to be higher/lower than 100% and combinations might not sum to their constituent parts (e.g. 'agree' relative to 'strongly agree'/'tend to agree'). This is due to the rounding of percentage figures to the nearest whole number.

6.2 Questionnaire

The following questionnaire is included for reference only as the survey instrument used in this study. It is provided to document the research methodology and is not intended to be completed by readers of this report.

**ASK ALL
TEXT
SurveyIntro**

INSERT LANDING PAGE

**ASK ALL
NUMERIC
SCREEN OUT AGE < 16 YEARS
D1a.
[POSTAL SURVEY 44a]**

What was your age on your last birthday?

--	--	--

998. Prefer not to say

**ASK THOSE WHO SAID PREFER NOT TO SAY AT D1a [D1a=998]
SINGLE CODE
D1b.
[POSTAL SURVEY 44b]
Which age group are you in?**

Please select one option only

1. 16 to 20 years
2. 21 to 29 years
3. 30 to 39 years
4. 40 to 49 years
5. 50 to 59 years
6. 60 to 69 years
7. 70 years or older
8. Prefer not to say [SCREEN OUT]

**ASK THOSE WHO SAID THEY ARE AGED 16-20 YEARS AT D1b [D1B=1]
SINGLE CODE
D1c.
[POSTAL SURVEY n/a]
Are you age 17 years or older?**

Please select one option only

1. Yes
2. No
3. Prefer not to say

CAR OWNERSHIP & PURCHASE INTENTION**ASK ALL****TEXT****Intro_1**

The following set of questions are asked on behalf of the Department for Transport. The questions are about the different types of transport that you may use and your plans for the future.

ASK ALL AGED 17+ YEAR [D1A => 17 OR D1B = CODE 2-7 OR D1C = YES]**SINGLE CODE****Q101****[POSTAL SURVEY 01]****Do you hold a valid UK car driving licence?*****This includes international permits or other foreign licences valid in the UK.******Please select one option only***

1. Yes, full licence for car
2. Yes, provisional licence for car
3. Currently disqualified
4. No, I do not hold a valid UK driving licence
5. No, I voluntarily surrendered my valid UK driving licence
998. Don't know

ASK ALL**SINGLE CODE****Q102****[POSTAL SURVEY 02]****How many cars or vans does your household own or have continuous use of at present?*****Please include company cars or vans if available for your private use. Please also include any broken-down cars or vans which may be in use within the next month.******Please select one option only***

1. 1
2. 2
3. 3 or more
4. None
998. Don't know

ASK ALL WITH CARS/VANS IN HOUSEHOLD OR HAVE USE OF THEM (CODES 1-3 AT Q102)**SINGLE CODE****Q103****[POSTAL SURVEY 03]**

Do you personally own or have continual use of a car or van?

Please include company cars or vans if available for your private use. Please also include any broken-down cars or vans which may be in use within the next month.

Please select one option only

1. Yes
2. No
998. Don't know

ASK ALL WHO HAVE PERSONAL USE/OWN A CAR OR VAN [CODE 1 AT Q103]**SINGLE CODE****W8 INT Q201****[POSTAL SURVEY 04]**

Thinking now about the one car or van that you personally use the most, whether as driver or passenger, what type of vehicle is it?

If you use two or more cars/vans equally, please think about the one you used most recently.

Please select one option only

1. Petrol
2. Diesel
3. Electric/battery only
4. Non-plug-in hybrid (i.e. combination of electric and petrol)
5. Plug-in hybrid (PHEV)
6. Liquified Petroleum Gas (LPG)
7. Bi-fuel (a combination of two fuels but not hybrid)
8. Other (please specify)
998. Don't know

ASK ALL WITH CARS/VANS IN HOUSEHOLD OR HAVE USE OF THEM (CODES 1-3 AT Q102)**SINGLE CODE****W8 INT Q202****[POSTAL SURVEY 05]**

Which ONE of the following best describes where you/your household typically parks your vehicle?

Please think about parking at the property where you live most of the time.

Please select one option only

1. In a space I own or that is allocated to me/us such as a private driveway or garage
2. In a communal or shared car park at the property
4. In a private car park
5. In a public or council car park
6. On a road or street
6. Where a friend or family member lives
7. Other (please specify)

ASK ALL
SINGLE CODE
Q104
[POSTAL SURVEY 06]

When, if at all, do you think you will personally next buy, lease or replace a car or van, either new or second hand?

Please select one option only

1. Within the next year
2. In more than 1 year, but up to 2 years
3. In more than 2 years, but up to 3 years
4. In more than 3 years, but up to 5 years
5. In more than 5 years
6. I don't intend to ever buy or replace a car/van
998. Don't know

ASK ALL WHO INTEND TO BUY OR REPLACE A CAR/VAN- (CODES 1-5 AT Q104)
SINGLE CODE
Q105
[POSTAL SURVEY 07]

And is the car or van that you intend to buy or lease in the future more likely to be new or second hand?

Please select one option only

1. More likely to be a new car/van
2. More likely to be a second-hand car/van
998. Don't know

ASK ALL WHO INTEND TO BUY OR REPLACE A CAR/VAN (CODES 1-5 AT Q104)
SINGLE CODE
Q106
[POSTAL SURVEY 08]

What type of car or van do you think you will most likely purchase or lease next time?
If you would buy more than one type, please select which one you would use for your main vehicle.

Please select one option only

1. Petrol car or van
2. Hybrid car or van (petrol and electric)
3. Diesel car or van
4. Electric/battery only car or van
5. Other (please specify) [FIX]
998. Don't know [FIX]

ASK ALL WHO WILL MOST LIKELY PURCHASE A HYBRID CAR/VAN (CODE 2 AT Q106)
SINGLE CODE**Q107****[POSTAL SURVEY 09]**

What type of hybrid car or van do you think you will most likely purchase or lease next time?

Please select one option only

1. A plug-in hybrid (that plugs in to an external power source to recharge)
2. A non-plug-in hybrid (that recharges while driving and is ultimately fuelled by petrol or diesel – it cannot be plugged in to an external power source)
3. Undecided [FIX]
998. Don't know [FIX]

ELECTRIC VEHICLES**ASK ALL****SINGLE CODE****Q108****[POSTAL SURVEY 10]**

The next set of questions are about electric vehicles. Unlike hybrid cars or vans, battery electric vehicles run fully off electricity. These fully electric cars or vans plug in to an external power source to recharge.

Before today, how much, if anything, would you say you knew about electric cars or vans?

Please select one option only

1. A great deal
2. A fair amount
3. Just a little
4. Heard of, know nothing about them
5. Never heard of them
998. Don't know

ASK ALL**ALLOW MULTICODE 1-8****Q111****[POSTAL SURVEY 11]**

Which of the following, if any, do you think are advantages of fully electric over petrol or diesel cars or vans?

Please select all that apply

1. Environmental benefits (e.g. reduced pollution)
2. Cheaper to run or maintain
3. Less noisy
4. Reduced road tax
5. Better vehicle performance (e.g. speed, handling, size, looks)
6. No need to visit petrol stations to top-up fuel
7. Recharging is easier/more convenient than re-fuelling
8. Other (please specify) [FIX]
9. None of these – I don't believe there are any advantages [FIX] [EXCLUSIVE]
998. Don't know [FIX] [EXCLUSIVE]

ASK ALL

ALLOW MULTICODE 1-9

Q113

[POSTAL SURVEY 12]

Which of the following, if any, do you think are disadvantages of fully electric over petrol or diesel cars or vans?

Please select all that apply

1. Less distance can be travelled on one charge
2. Not enough charging points
3. Expensive to run or maintain
4. Knowing where and how to charge
5. The time taken to recharge
6. Cost to buy
7. The need to recharge
8. Negative impacts on the environment
9. Other (please specify) [FIX]
10. None of these – I don't believe there are any disadvantages [FIX] [EXCLUSIVE]
998. Don't know [FIX] [EXCLUSIVE]

Electric Vehicle Charging Points

ASK ALL

SINGLE CODE

W8 PUR Q203

[POSTAL SURVEY 13]

These next questions are about electric vehicle charging points – that is, places where members of the public can charge an electric vehicle perhaps when they are travelling somewhere or because they cannot charge their vehicle at home. These are found in some car parks, at garages and service stations on motorways/major roads and in towns and cities. The images below show some examples.



Thinking back to the PAST MONTH or so, did you see an electric vehicle charging point(s)? It does not matter whether or not you used the charging point.

When answering please think of your local area as the area that is within 15-20 minutes' walk or 5 minutes' drive from your home.

Please select one option only

1. Yes – only within my local area
2. Yes – only outside my local area
3. Yes – both within and outside of my local area
4. No – did not see an electric vehicle charging point in the past month
5. Don't know/can't remember

ASK ALL RESPONDED 'YES' AT W8 PUR Q203 [W8 PUR Q203 = 1 OR 2 OR 3]

ALLOW MULTICODES AT 1 – 7

W8 PUR Q204

[POSTAL SURVEY 14]

You said that you have seen an electric vehicle charging point(s) in the past month.

Where did you see it/them?

Please select all that apply

1. On the street
2. At a supermarket
3. At a public or council car park
4. At a workplace e.g. outside business offices
5. At a garage/petrol station where you can refuel
6. At a service station on a motorway/major road
7. Other (please specify)
998. Don't know/can't remember [EXCLUSIVE]

ASK ALL

SINGLE CODE

W8 PUR Q205

[POSTAL SURVEY 15]

Thinking about where you live most of the time, how far away is the nearest charging point for electric vehicles – that is, a point which can be used by any member of the public wanting to charge an electric vehicle? If you are not sure, please give your best estimate.

Please select one option only

1. Less than a mile away (approximately a 3-minute drive, 20-minute walk)
2. More than a mile but less than 5 miles away (up to a 15-minute drive, 1 hour walk)
3. More than 5 miles but less than 10 miles away (up to a 30-minute drive, 1.5 hour walk)
4. 10 miles or further away
998. Don't know

ASK ALL
ALLOW MULTICODES 1-8
W8 PUR Q206
[POSTAL SURVEY 16]

As you may know, some electric vehicle owners charge their vehicles at charging points situated in public places. What concerns would you have, if any, about using a charging point?

Please select all that apply

1. The time it would take to re-charge
2. The inconvenience of having to wait while the vehicle charged
3. Uncertainty about whether the chargepoint would be available when I needed it due to having to queue to use it
4. Uncertainty about whether the chargepoint would be available when I needed it due to it being out of order
5. The cost of recharging
6. Concerns about the safety and security of the vehicle if left unattended
7. Concerns about my personal safety when waiting for the vehicle to be charged
8. Other (please specify)
9. I would not have any concerns [EXCLUSIVE]
10. Don't know/I would need further information [EXCLUSIVE]

E-SCOOTERS

SINGLE CODE
Q122
[POSTAL SURVEY 17]

An electric or motorized scooter is a scooter with a small engine or electric motor. An electric scooter is commonly referred to as an e-scooter. E-scooters can be purchased for private use or hired in a number of locations across the country.

Before today, how much, if anything, would you say you knew about electric scooters?



Please select one option only

1. A great deal
2. A fair amount
3. Just a little
4. Heard of, know nothing about them
5. Never heard of them
998. Don't know

ASK ALL**SINGLE CODE****Q123****[POSTAL SURVEY 18]****Do you personally own an electric scooter?*****Please select one option only***

1. Yes
2. No
998. Don't know

ASK ALL**SINGLE CODE****Q124****[POSTAL SURVEY 19]****How often, if at all, have you personally used a privately owned electric scooter in the UK in the last 12 months?*****Please select one option only***

1. Every day
2. Most days
3. About once or twice per week
4. About once or twice per month
5. About once every three months
6. About once every six months
7. About once in the last 12 months
8. Not used in the last 12 months
9. Don't know

**ASK ALL
SINGLE CODE
Q125
[POSTAL SURVEY 20]**

How often, if at all, have you personally used a rental electric scooter in the UK in the last 12 months?

Please select one option only

1. Every day
2. Most days
3. About once or twice per week
4. About once or twice per month
5. About once every three months
6. About once every six months
7. About once in the last 12 months
8. Not used in the last 12 months
9. Don't know

**ASK ALL WHO RESPONDED 1–8 AT Q124 OR Q125
MULTICODES 1-10
W8 ES Q209
[POSTAL SURVEY 21]**

What are your reasons for using an e-scooter?

Please only include travel within the UK.

Please select all that apply

1. Going to or from work
2. Other work-related reasons e.g. travelling to a meeting outside my usual place of work
3. Visiting friends/family
4. Going shopping
5. Going for a ride
6. Going to or from education (e.g. school, college, university etc.)
7. Going to or from a leisure activity (e.g. eating/drinking, cinema, music venue, playing sport etc.)
8. Going to or from a medical appointment (e.g. doctor, hospital, dentist etc.)
9. To get to public transport
10. Other (please specify) [FIX]
998. Don't know [FIX], [EXCLUSIVE]

ASK ALL
SINGLE CODE
W8 ES Q210
[POSTAL SURVEY 22]

How likely or unlikely are you to purchase an e-scooter in the next 12 months?

Please select one option only

1. Very likely
2. Fairly likely
3. Neither likely nor unlikely
4. Fairly unlikely
5. Very unlikely
6. I already own an e-scooter
998. Don't know

ASK ALL
ALLOW MULTICODES 1-14
Q127
[POSTAL SURVEY 23]

Which of the following, if any, do you think are advantages of electric scooters?

Please select all that apply

1. Environmental benefits (e.g. reduced pollution)
2. Quicker to get around than walking
3. Easy to use
4. Cheaper than other travel options
5. Able to easily store and carry (e.g. onto other forms of transport, into work)
6. Good alternative to cars
7. Convenient for short journeys
8. Increased use leads to less traffic/cars on the road
9. Fun to ride
10. Easy to park (if using rental e-scooter)
11. Good for people who can't travel (far) by foot/bike
12. The cost to buy or rent
13. A way of keeping active/healthy
14. Other (please specify) [FIX]
15. None of these – I don't believe there are any advantages [FIX], [EXCLUSIVE]
998. Don't know [FIX], [EXCLUSIVE]

ASK ALL
ALLOW MULTICODES 1-11
Q129
[POSTAL SURVEY 24]

Which of the following, if any, do you think are disadvantages of electric scooters?

Please select all that apply

1. Poses safety risk on busy roads
2. Poses safety risk to pedestrians (e.g. on the road, pavements)
3. Users do not follow the law
4. Poses safety risk to the rider
5. Relies on recharging a battery
6. Fewer health benefits than cycling or walking
7. Weather dependent
8. Lack of regulation (e.g. no licence/insurance/helmet required)
9. Cost to buy
10. Risk of battery fire
11. Other (please specify) [FIX]
12. None of these – I don't believe there are any disadvantages [FIX], [EXCLUSIVE]
998. Don't know [FIX], [EXCLUSIVE]

ASK ALL
SINGLE CODE PER STATEMENT
W8 ES Q212

[POSTAL SURVEY 25]

E-scooters can be purchased for private use or hired in a number of locations across the country.

Here are some statements about rules about using e-scooters in the UK. For each one, please indicate whether you think it is true or false or whether you don't know.

- A) If you own an e-scooter, you are legally allowed to ride it on pavements and footpaths
- B) If you own an e-scooter, you are legally allowed to ride it on roads and cycle lanes
- C) If you hire an e-scooter, you are legally allowed to ride it on pavements and footpaths
- D) If you hire an e-scooter, you are legally allowed to ride it on roads and cycle lanes

Please select one option only

1. True
2. False
998. Don't know

E-CYCLES**ASK ALL****SINGLE CODE****Q137****[POSTAL SURVEY 26]**

An electric cycle or e-cycle, commonly referred to as an e-bike, is one that is powered by electricity as well as propelled by pedals. E-cycles are limited to 15.5 miles per hour with pedal assist.

E-cycles can be purchased for private use and used through cycle hire and cycle share schemes in a number of locations across the country.

Before today, how much, if anything, would you say you knew about e-cycles?



Please select one option only

1. A great deal
2. A fair amount
3. Just a little
4. Heard of, know nothing about them
5. Never heard of them
998. Don't know

ASK ALL**SINGLE CODE PER STATEMENT****W8 EC Q213a****[POSTAL SURVEY 27]**

Do you personally own an e-cycle?

Please select one option only

1. Yes
2. No
3. Don't know

ASK ALL
SINGLE CODE PER STATEMENT
W8 EC Q213b
[POSTAL SURVEY 28]

Do you personally own a standard cycle (e.g. a push bike)?

Please select one option only

1. Yes
2. No
3. Don't know

ASK ALL
SINGLE CODE
W8 EC Q214
[POSTAL SURVEY 29]

How likely or unlikely are you to purchase an e-cycle in the next 12 months?

Please select one option only

1. Very likely
2. Fairly likely
3. Neither likely nor unlikely
4. Fairly unlikely
5. Very unlikely
6. I already own an e-cycle
998. Don't know

ASK ALL
SINGLE CODE
Q138
[POSTAL SURVEY 30]

How often, if at all, have you personally used an e-cycle in the last 12 months?

Please select one option only

1. Every day
2. Most days
3. About once or twice per week
4. About once or twice per month
5. About once every three months
6. About once every six months
7. About once in the last 12 months
9. Not used in the last 12 months
9. Don't know

ASK ALL
SINGLE CODE
W8 EC Q215
[POSTAL SURVEY 31]

How often, if at all, have you personally used a standard cycle (e.g. a push-bike) in the last 12 months?

Please select one option only

1. Every day
2. Most days
3. About once or twice per week
4. About once or twice per month
5. About once every three months
6. About once every six months
7. About once in the last 12 months
8. Not used in the last 12 months
9. Don't know

ASK ALL
ALLOW MULTICODES 1-7
Q140
[POSTAL SURVEY 32]

Which of the following, if any, do you think are advantages of e-cycles?

Please select all that apply

1. Environmental benefits (e.g. reduced pollution)
2. A way of keeping active/healthy
3. Less effort required than a normal bike
4. Can travel further distances than a normal bike
5. Can travel faster than a normal bike
6. More accessible for those with mobility issues
7. Other (please specify) [FIX]
8. None of these – I don't believe there are any advantages [FIX, EXCLUSIVE]
998. Don't know [FIX, EXCLUSIVE]

ASK ALL
ALLOW MULTICODES 1-8
Q142
[POSTAL SURVEY 33]

Which of the following, if any, do you think are disadvantages of e-cycles?

Please select all that apply

1. They are expensive to buy
2. Too heavy
3. Likely to be stolen
4. Travels too fast
5. Hard to store
6. Do not offer health benefits
7. Relies on recharging a battery
8. Risk of battery fire
9. Other (please specify) [FIX]
10. None of these – I don't believe there are any disadvantages [FIX, EXCLUSIVE]
998. Don't know [FIX, EXCLUSIVE]

ASK ALL
SINGLE CODE
W8 EC Q216B
[POSTAL SURVEY 34]

An e-cycle share scheme is a service that allows people to pay to hire an e-cycle by collecting it from a “docking” point such as a bike rack or a “dockless” location such as a pavement or where it has been left by previous users. This could involve share schemes that are available to anyone, or they could be targeted share schemes that are available to employees in a workplace, or community groups.

How likely or unlikely would you be to use an e-cycle share scheme if it was available in your area?

Please select one option only

1. Very likely
2. Fairly likely
3. Neither likely nor unlikely
4. Fairly unlikely
5. Very unlikely
998. Don't know

GOLDEN QUESTIONS TRANSPORT USER PERSONAS**NEW SCREEN****ASK ALL****TEXT****GQ_INTRO**

These next questions are about your general travel habits, current behaviour and personal circumstances.

ASK ALL**MULTICODE 1-14****B17.****[POSTAL SURVEY 35]**

Looking at this list, which of these things are important to you when buying a car or van?

Please select all that apply.

1. Comfort
2. Costs – purchase/running/resale value/tax/insurance
3. Small engine
4. Large engine
5. Environmentally friendly/low CO2 Emissions
6. Image of brand/brand preference
7. Image of model/model preference
8. Interior space/functionality/boot size
9. Reliability
10. Safety
11. Speed/performance
12. Style/design
13. Features – automated parking; adaptive cruise control; in-car Wi-Fi connection etc.
14. Other (please specify)
998. Don't know [FIX, EXCLUSIVE]

ASK ALL**SINGLE CODE****CN76****[POSTAL SURVEY 36]**

And how often nowadays, if at all, do you use home delivery (e.g. internet shopping/telephone ordering) for any non-food shopping, such as for buying books, music, clothes, holidays, or insurance?

Please select one option only

1. Regularly
2. Sometimes
3. Have only done this once or twice
4. Never
998. Don't know

**ASK ALL
MULTICODE****B2.****[POSTAL SURVEY 37]**

Do you have any disability or other long-standing health problem that makes it difficult for you to do any of the following?

Please include difficulty due to old age.

Please select all that apply

1. Go out on foot
2. Use local buses
3. Get in or out of a car
998. None of these [EXCLUSIVE]

**ASK ALL
SINGLE CODE****B39b****[POSTAL SURVEY 38]**

Do you have any disability or other long standing health problem that makes it/would make it difficult or impossible for you to ride a bicycle?

Please include difficulty due to old age.

Please select one option only

1. Yes – impossible
2. Yes – difficult
3. No
998. Don't know

**ASK ALL
SINGLE CODE****F5.****[POSTAL SURVEY 39]**

Do any children live with you either all or some of the time? By children, we are referring only to children under the age of 16.

Please select one option only.

1. Yes
2. No
3. Prefer not to say

ASK ALL
SINGLE CODE
F12.
[POSTAL SURVEY 40]

Please indicate whether you have any of the educational or school qualifications listed.

Please select your highest level of education or qualification.

Please select one option only

1. University Higher Degree (e.g. MSc; PhD)
2. First degree level qualification (e.g. BA; BSc) including foundation degrees; PGCE
3. Diploma in higher education; HNC; HND; Nursing or Teaching qualification (excluding PGCE)
4. A level; AS level; NVQ level 3; GNVQ Advanced; or equivalent
5. GCSE grade A* - C; O level; CSE grade 1; NVQ level 2; GNVQ intermediate; or equivalent
6. GCSE grade D – G; CSE below grade 1; NVQ level 1; GNVQ Foundation level; or equivalent
7. None of the above
8. Prefer not to say

Demographics

ASK ALL
SINGLE CODE
D2.
[POSTAL SURVEY 42]

Which of the following best describes your gender?

Please select one option only

1. Man
2. Woman
3. Non-binary
4. My gender is not listed
5. Prefer not to say

**ASK ALL
SINGLE CODE**

D3.

[POSTAL SURVEY 43]

Including yourself, how many people aged 16 and over live in your household?

If you are the only adult in your household, please type 1.

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people aged 16 and
over

988. Prefer not to say

**ASK ALL
SINGLE CODE**

D4.

[POSTAL SURVEY 44]

Which of these best describes your current situation?

Please select one option only

1. Working full-time (30+ hours)
2. Working part-time (8-29 hours)
3. Unemployed – less than 12 months
4. Unemployed (long term) – more than 12 months
5. Not working – retired
6. Not working – looking after house/children
7. Not working – long term sick or disabled
8. Student – in full-time education studying for a recognised qualification
9. Student – in part-time education studying for a recognised qualification
10. Other
11. Prefer not to say

**ASK ALL
SINGLE CODE**

D5.

[POSTAL SURVEY 45]

Does your household own or rent this accommodation?

Please select one option only

1. Buying it on a mortgage
2. Own it outright
3. Rent it from Local Authority
4. Rent it from Housing Association/Trust
5. Rent it from private landlord
6. Other
998. Don't know
999. Prefer not to say

ASK ALL
SINGLE CODE
D6.
[POSTAL SURVEY 46]

What is the total income of your household as a whole (earned by all members of your household), per year from all sources before tax – including benefits, saving and so on?

Please select one option only

1. Up to £25,999
2. £26,000 up to £51,999
3. £52,000 up to £99,999
4. £100,000 and above
998. Don't know
999. Prefer not to say

ASK ALL
SINGLE CODE
D7.
[POSTAL SURVEY 47]

Which one of the following best describes your ethnic group or background?

Please select one option only

- A. White
 1. English, Welsh, Scottish, Northern Irish or British
 2. Irish
 3. Gypsy or Irish Traveller
 4. Roma
 5. Any other White background
- B. Mixed or Multiple ethnic groups
 6. White and Black Caribbean
 7. White and Black African
 8. White and Asian
 9. Any other Mixed or Multiple ethnic background
- C. Asian or Asian British
 10. Indian
 11. Pakistani
 12. Bangladeshi
 13. Chinese
 14. Any other Asian background
- D. Black, Black British, Caribbean or African
 15. Caribbean
 16. African
 17. Any other Black, Black British, Caribbean or African background
- E. Other ethnic group
 18. Arab
 19. Any other ethnic group
20. Prefer not to say

**ASK ALL
TEXT
NS-SEC_INTRO**

The final few questions refer to your current main job, or, if you are not working now, to your last main job.

**ASK ALL
SINGLE CODE**

**D8.
[POSTAL SURVEY 48]**

Do (did) you work as an employee or are (were) you self-employed?

Please select one option only.

1. Employee
2. Self-employed with employees
3. Self-employed or freelance without employees
4. I have never had a job

**ASK THOSE WHO HAVE/HAD A JOB (D8=1 OR 2 OR 3)
SINGLE CODE**

**D9.
[POSTAL SURVEY 49]**

How many people work (worked) for your employer at the place where you work (worked)? If you are self-employed: How many people do (did) you employ?

Please select one option only

1. 1 to 24
2. 25 or more
998. Don't know
999. Prefer not to say

**ASK THOSE WHO HAVE/HAD A JOB (D8=1 OR 2 OR 3)
SINGLE CODE**

**D10.
[POSTAL SURVEY 50]**

Do (did) you supervise any other employees?

A supervisor is responsible for overseeing the work of other employees on a day-to-day basis.

Please select one option only

1. Yes
2. No

ASK THOSE WHO HAVE/HAD A JOB (D8=1 OR 2 OR 3)
SINGLE CODE
D11.
[POSTAL SURVEY 51]

Which of the following best describes the sort of work you do in your current job?

If you are not working now, please select which best described what you did in your last job.

Please select one option only

1. **Modern professional occupations**
Such as: teacher, nurse, physiotherapist, social worker, welfare officer, artist, musician, police officer (sergeant or above) or software designer
2. **Clerical and intermediate occupations**
Such as: secretary, personal assistant, clerical worker, office clerk, call centre agent, nursing auxiliary or nursery nurse
3. **Senior managers or administrators**
Such as: finance manager or chief executive (usually responsible for planning, organising and co-ordinating work, and for finance)
4. **Technical and craft occupations**
Such as: motor mechanic, fitter, inspector, plumber, printer, tool maker, electrician, gardener or train driver
5. **Semi-routine manual and service occupations**
Such as: postal worker, machine operative, security guard, caretaker, farm worker, catering assistant, receptionist or sales assistant
6. **Routine manual and service occupations**
Such as: HGV driver, van driver, cleaner, porter, packer, sewing machinist, messenger, labourer, waiter/waitress or bar staff
7. **Middle or junior managers**
Such as: office manager, retail manager, bank manager, restaurant manager, warehouse manager or publican
8. **Traditional professional occupations**
Such as: accountant, solicitor, medical practitioner, scientist or civil/mechanical engineer
9. **Prefer not to say**

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