



ELECTRIC VAN ADOPTION REPORT

Why better on-street charging
is crucial for electric van adoption



VAUXHALL

CONTENTS

Foreword	3
Section 1: Attitudes towards electric van adoption today	4
Section 2: When will businesses be ready to switch?	7
Section 3: Powering up the UK's businesses	10
Conclusion	11

METHODOLOGY

The research was conducted by Opinion Matters among a sample of 2,000 UK Fleet Operators (Aged 18+) with a minimum of two vans in their fleet. The data was collected in late 2024 through an online survey, interviewing respondents from existing double-opt in panels. The confidence interval is estimated to be +/-2.19% to a confidence level of 95%. Opinion Matters abides by and employs members of the Market Research Society, and follows the MRS code of conduct and ESOMAR principles. Opinion Matters is also a member of the British Polling Council.

FOREWORD

The UK Government's 2035 ban on the sale of new petrol and diesel vehicles edges ever closer, yet the challenge of converting UK businesses to an electric future is a key priority that remains unsolved. It must be dealt with if we are to keep Britain's businesses moving.

While vehicle manufacturers strive to ensure their electric models work for a wide variety of fleets and businesses across the UK, there are still other complex challenges preventing business owners from transitioning to electric without significant cost and impact on their services.

As a core British brand and a fleet partner to a number of leading UK businesses, Vauxhall aims to support UK drivers and companies to transition to electric vehicles (EVs) easily and efficiently.

We were one of the first manufacturers to offer a fully electric version of all our LCV models, and now offer a fully electric version of every car and van in our line-up.

Vauxhall continues to support businesses looking to make their initial switch over to electric vans, with incentives such as reduced list prices across our latest electric van line-up and extended vehicle ranges allowing drivers to go even further. Today, approximately 20% of all electric vans registered to drive on UK roads are Vauxhall models.

But we want to go even further than that.

In 2023, we launched *Electric Streets of Britain*. With our charge point operator partners - Chargy, Connected Kerb and Surecharge - Vauxhall aims to support local authorities in accelerating the UK's on-street charging infrastructure, providing greater access to EVs for the 40% of UK households without a driveway.

From previous research and experience, we know that access to fast and reliable on-street residential charging is a significant factor for many drivers throughout the UK who are considering the switch to an EV, including drivers of fleet vehicles.

In this *Electric Van Adoption Report*, Vauxhall has set out to explore the importance of a reliable and accessible public charging network for businesses across the country. The research outlined in this new report explores the approach fleet operators are taking towards electrifying their fleet, whilst highlighting how a focus on public charging infrastructure can ensure this is achieved efficiently and effectively.



Eurig Druce, Group Managing Director, Stellantis UK

SECTION 1

ATTITUDES TOWARDS ELECTRIC VAN ADOPTION TODAY

Lifting the lid on fleet operators' views of electric vans

Growth in number of electric van sales in UK



Source: The Society of Motor Manufacturers & Traders

Growth in public charge points in UK



Source: Zapmap - EV charging statistics 2024

90% of fleet operators believe their organisation's electric van adoption is 'advanced'.

But digging down:

- ▶ While **84%** of fleet operators have EV models on their fleet, only **8%** of organisations have transitioned to fully electric fleets.
- ▶ Hybrids are the most common powertrain in operators' fleets at **44%**, while petrol and diesel models (**35%**) remain ahead of fully electric (**21%**).



Leading the charge?

- ▶ **94%** of fleet operators who run vans that go 101 – 200 miles a week say their adoption of electric vans is advanced.
- ▶ Those that have vans that go 50 – 100 miles a week are least advanced at **75%**.



Companies in travel & transport and financial services are the most advanced at **93%**.



Firms in the retail, catering & leisure sectors are among the least advanced at **83%**.

State of the Nation



84% of UK businesses have electric vans in their fleet

97% of businesses in Yorkshire and the Humber consider themselves 'advanced' in their EV uptake

91% of East Midlands firms feature at least one electric van

26% of fleets in the South West have no electric vans

Which industries are most supportive of a switch to a fully electric fleet?



83% Retailer / Leisure / Catering



82% Healthcare



80% HR

While the majority of fleets have experience running electric vans, there is resistance to making a complete switch.

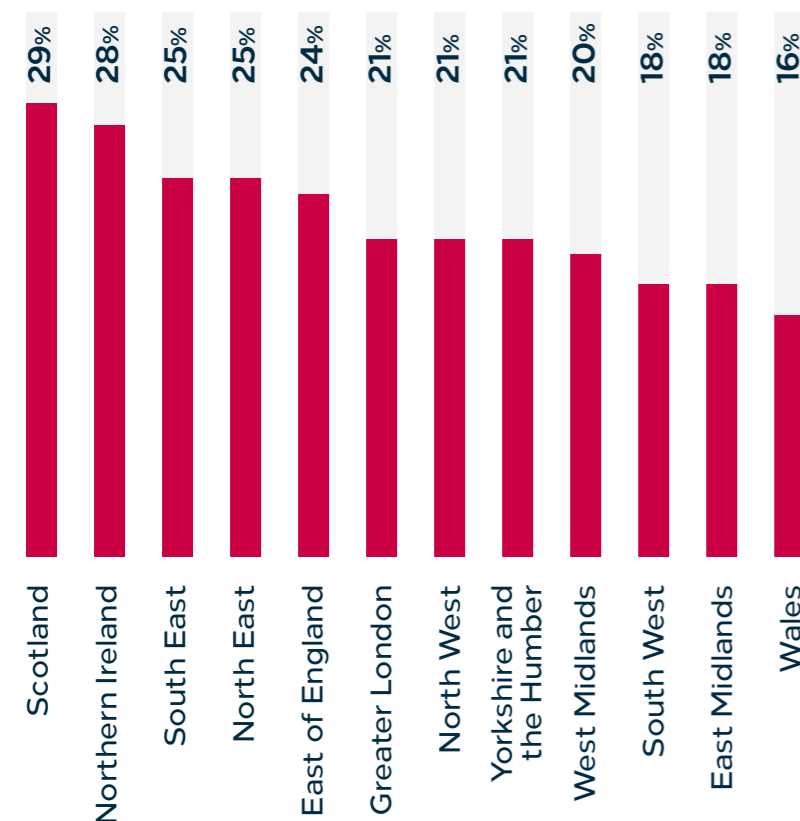
Fleet operators have misgivings:

- ▶ Almost three-quarters of fleet operators (**73%**) running at least one electric van have considered swapping to petrol, diesel or hybrid models.
- ▶ **83%** think switching to a fully electric van fleet would be 'challenging'.
- ▶ The bigger the business, the greater the resistance to a total switch to electric vans: **24%** of fleet operators with 41-50 vans are seeing resistance, though this drops sharply to **7%** of those managing fleets of only 5-10 vehicles.

Concerns about access to electric vehicle charging:

- ▶ **21%** say the electric vans in their fleet are most commonly charged on streets near drivers' homes.
- ▶ **23%** of fleet operators specifically say a lack of on-street residential charging around their van drivers' homes is the biggest barrier to switching to an all-electric fleet.
- ▶ **81%** of businesses told Vauxhall it would be problematic to install EV charging provision at their operating bases - **91%** say their drivers would be reliant on on-street charging if they were to go fully electric.
- ▶ Previous research from Vauxhall and Cenex shows that only **19%** of UK households who need charging are close to a chargepoint.

Where the lack of residential chargers on van drivers' streets is the biggest barrier to switching to a full electric fleet



Industries that say on-street charging is the main barrier to going fully electric



SECTION 2

WHEN WILL BUSINESSES BE READY TO SWITCH?

Fully electric fleets are in sight despite some challenges

Businesses want to go electric, and there's a sense of optimism from fleet operators that moving to a fully electric van fleet is attainable, once infrastructure allows it.

Across the UK, only **16%** of firms' fleets do not have an electric van but that too is set to quickly change: **90%** of these businesses are keen to be running at least one electric van within 12 months and **97%** within two years.

The UK Government's ban on the sale of new petrol and diesel vehicles begins in 2035. But operators' responses show that the average date by which their fleets will become fully electric is far earlier - late 2028.

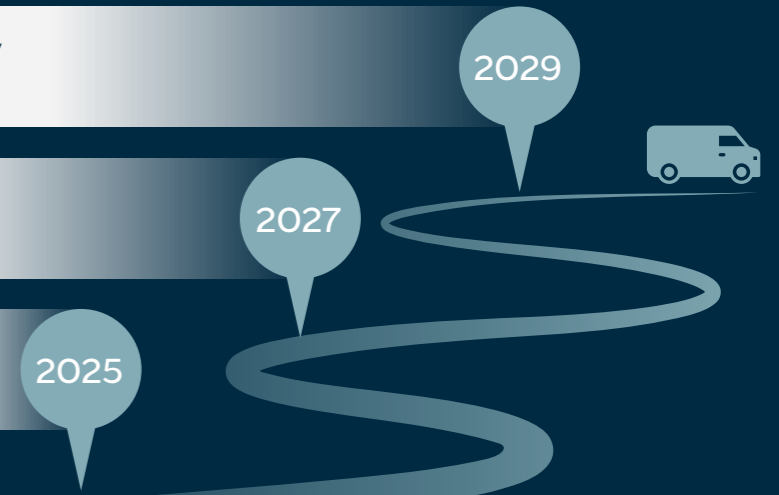
- ▶ Some businesses are racing ahead - **39%** feel they would be able to switch to an all-electric fleet by 2026.
- ▶ Firms in Yorkshire and the Humber are notably leading the pack: **66%** feel their business would be able to switch to an all-electric fleet by 2026.
- ▶ Fleet operators working in sales, media & marketing told Vauxhall they plan to adopt quickest, with this industry aiming to be fully electric by early 2027.
- ▶ Businesses in the travel and transport sector are moving the slowest - they don't expect to be fully electric until mid-2031.
- ▶ **90%** of fleet operators say they will be fully electric before 2035.

Fleets that go the shortest distances say they will be ready to go fully electric soonest

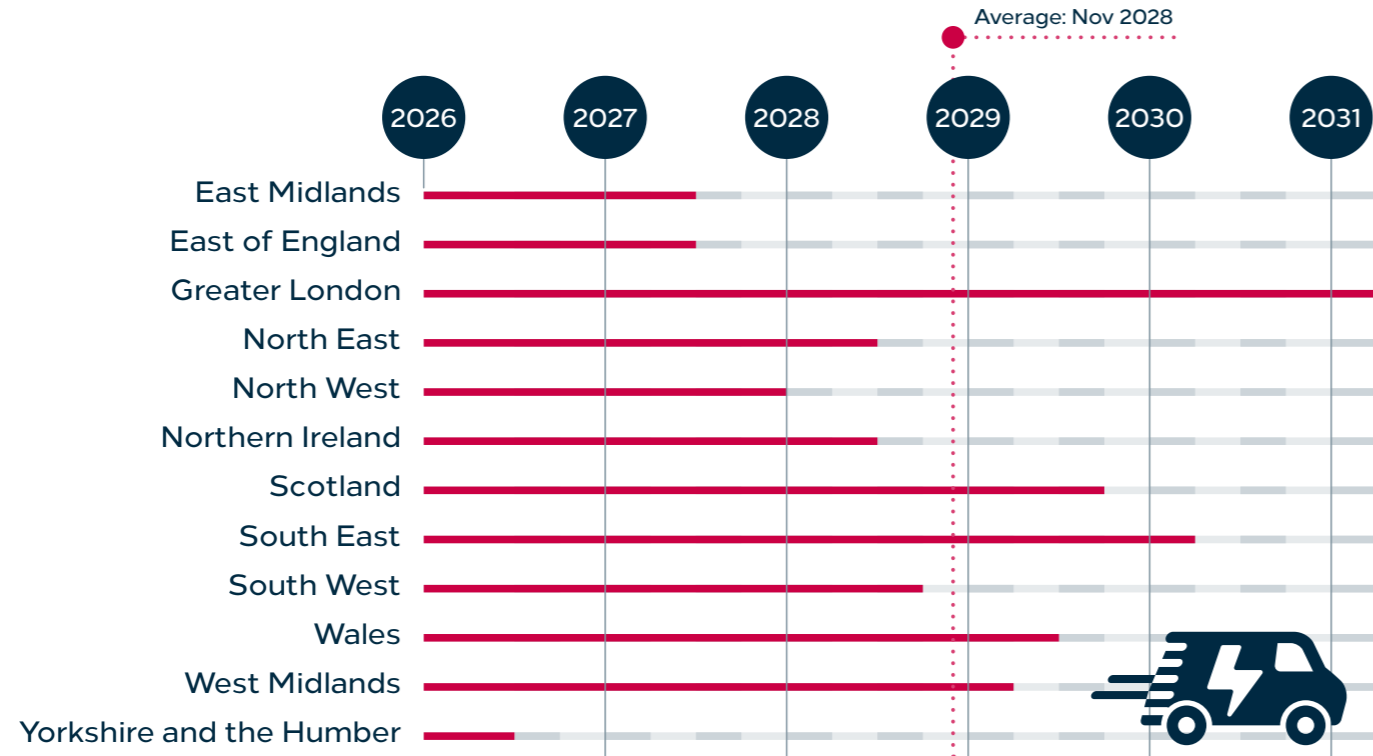
Fleets that go **over 400 miles** a week say they will be ready in **late 2029**

Those that go **up to 400 miles** say they should be ready by **early 2027**

Fleets that go just **up to 100 miles** say they should be ready by **mid-2025**



When businesses feel they would be most able to switch to an all-electric fleet



Positive energy:

How increasing charging helps companies embrace electrification

40% of UK households do not have driveways and are therefore reliant on public charging.

Businesses are clear that improving charging infrastructure across the UK, not least the on-street supply, is fundamental if the transition to full electrification is to happen.

Is the lack of charging the biggest barrier to fully switching?

Almost all fleet operators – 91% – say their drivers will need access to on-street public charge points if their companies are to transition to a fully electric fleet. Smaller operators (max 30 vans) will be especially reliant: 92% say this is essential because so many of their drivers typically take their van home from work.

Those that have vans that go 400+ miles are more likely to say improving the charging network is the main thing the Government can do to encourage businesses to switch to fully electric fleets.



When asked what single central and local government action could encourage quicker transition, 26% of fleet operators cited improving the public charging network.

In five of the 12 parts of the UK this was the top response.



Other factors that will allow businesses to go fully electric



SECTION 3

POWERING UP THE UK'S BUSINESSES

The pros and cons of all-electric fleets

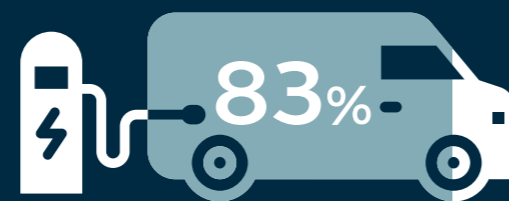
Our research reveals fleet operators' reservations about the charging network, concerns over their drivers resisting change and how the move to electric vans fits in with business strategies across a range of key sectors throughout the country.

But what would going electric actually mean for fleet operators?

Different industries see a range of benefits to electric vans that suit their needs:



The vast majority of fleet operators recognise the positive outcomes of switching to electric vans:



83% who currently operate electric vans say they generally benefit their business



91% believe switching to an all-electric fleet would positively impact customers' perceptions of their business

80% of fleet operators think the Government will delay the ban on the sale of new petrol and diesel models from 2035 to 2040

However, 80% also feel reverting to the original 2030 deadline for final sales of ICE models would be a positive move

CONCLUSION



The findings of the analysis presented in our *Electric Van Adoption Report* reveal that a large proportion of British fleet drivers would be reliant on on-street charging infrastructure if their business switched to a fully electric van fleet. It also makes clear that accessibility to reliable residential charging must be improved rapidly to support UK business owners in making the move to electric vehicles.

The desire to go electric is apparent, with almost all fleet operators saying that being able to convert to an electric fleet would be positive for their business, and more than a third aiming for their fleet to be 100% electric before the planned ban on the sale of new petrol and diesel vehicles.

However, support is needed, and the fact that more than 90% of fleet operators say their drivers would be reliant on on-street charging if they were to go electric is a stark reminder of the current gaps in the UK's EV infrastructure.

Electric Streets of Britain was introduced to support all drivers in their journey towards electrification, with particular consideration for the 40% of UK households which do not have driveways and therefore are reliant on the public charging network.

Only when accessible residential charging infrastructure is in place on streets across the country will fleet operators feel comfortable that their businesses can move towards a fully electric fleet.

Vauxhall is a proud supporter of British business and continues to call for a considered and targeted approach to charge point installation to ensure access is available to all those who need it.

We hope that by highlighting this issue and giving a snapshot of the current fleet landscape, the challenges faced by business owners and their future plans, this report will serve to act as a catalyst for change and support companies across the country wanting to join the UK's electrification journey.