Autotrader

No Driver Left Behind Report

Bridging the electric vehicle income gap

January 2026

Introduction

Early adopters of electric vehicles (EVs) were a very specific group, buying expensive brand new EVs – mainly over 55, wealthy, white, male and tech savvy.

Why was that?

The sheer number and nature of barriers to adopting electric cars meant that only a narrow segment of people were likely to consider them - we used to talk about them being the preserve of the wealthy. Essentially, if you didn't match those specific demographic characteristics, it was unlikely you'd choose an electric car.

Now, as adoption grows and the used market matures - with 1.7 million EVs on the road - we're seeing changes in who is buying, you no longer have to be techy, or super wealthy to go electric.

With over 160 electric models on the market - spanning most price points - consumers simply have more choice. The chances of more people being exposed to EVs increases all the time, which will only help future adoption levels.

And as electric cars become 'just great cars', and a logical choice for a larger group of people (62% will now consider purchasing an EV for their next car, up from around a third a few years ago), electric buyers broaden out to just be car buyers. This is great news, but looking ahead - who's still at risk of being left behind?

We've delved into two factors that can influence electric adoption:

Income

There's a distinct gap in electric consideration and awareness between households with income above and below £40,000.

Household Income (HHI)[1]:

< £40k	48%
> £40k	73%

Income doesn't define a person - and it's not something that can be easily increased - but it can impact their awareness and engagement with EVs.

Mindset

A traditional Vs a progressive mindset is directly linked to electric consideration.

Traditional Vs Progressive mindset[2]:

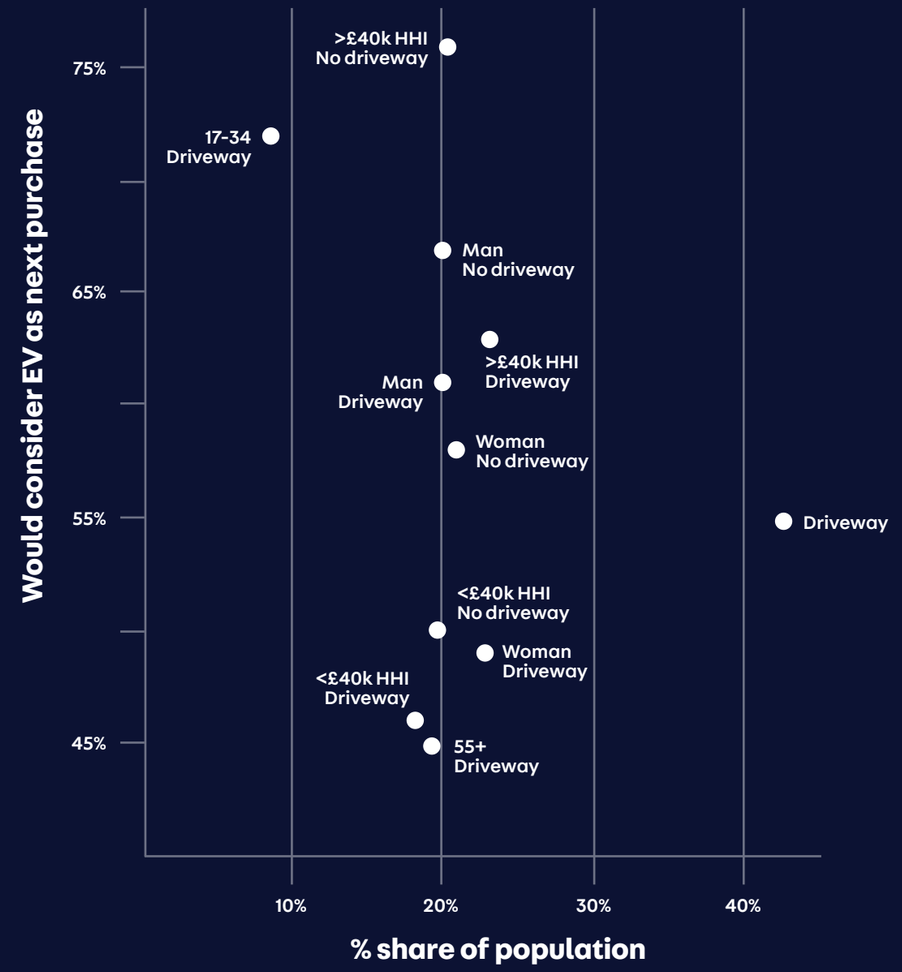
Traditional	39%
Progressive	82%

Mindsets are linked to values and personal attitudes and can be influenced by occupation, friends, family, culture and personal experiences.

Why mindset?

Due to the running cost savings available if you can charge at home, there's been an assumption that the 60% of households who have access to off-street parking will make the switch as soon as they can afford it. From an electric transition point of view, we thought off-street parking would be a key factor in determining if someone would consider an electric car or not.

Here's what the data showed us:



1. All data in this Report is from the No Driver Left Behind 2.0 research September 2025 - 2,600 responses, in a nationally representative survey, conducted by QuMind on behalf of Autotrader
2. 39% of respondents with a traditional mindset will consider an EV compared to 82% of those with a progressive mindset, NDLB 2.0 Research 2025

It became apparent that off-street parking wasn't the clear-cut indicator we had hoped it would be. Across demographic groups – age, gender, household income – there was no obvious line to draw between ability to charge at home and likelihood to make the switch.

So, what is a better indicator of electric consideration?

It turns out there's another force at play – reflecting the person, rather than their parking options - which hasn't been given the attention it deserves: mindset.

What do we mean by mindset?

We asked consumers a series of questions about their attitudes, values and priorities and found two clear groups.

Traditional	Progressive
Are less optimistic about the UK economy, uninterested in tackling climate change and less open to embracing change	Support social equality and embrace change, are more trusting in government institutions and think tackling climate change should be a top priority
Even gender split	Even gender split
51% have household income below £40k	68% have household income above £40k
72% are 45+	63% are aged below 45
56% live in a rural area	68% live in or near a city
61% have off-street parking	57% have off-street parking
39% likely to consider an EV	82% likely to consider an EV

So, we're dealing with two types of lenses through which we can view consumers – income and mindset - both feel like very difficult attributes to affect. But who specifically within these groups is at risk of being left behind and why?

1. **Households with less than £40,000 income who have low awareness and consideration of EVs**

"No opinion to be honest." (Age: 60)

2. **A subset of these lower income households – those whose lifestyles and identities make them more likely to have come across EVs. This subgroup is keen to make the switch but can't afford to.**

"I think they are a great thing, especially for the environment." (47)

3. **Those with traditional mindsets and household income above £40,000 – it makes sense for them financially and in theory they should be interested, but they aren't due to their attitudes**

"I hate them, don't trust them and would never own one." (40)

In this second No Driver Left Behind Report, we'll deep dive into these three groups to explore more about who they are, what's causing them to be left behind and what we can do about it, as well as how impactful that group could be for the transition.

1 Households with less than £40,000 income – “Needs-first households”

Size of this group: 42% of the nationally representative survey.

Risk: Households with income £40,000 and below could be left behind in the electric transition.

Household Income (HHI)[3]:

< £40k	48%
> £40k	73%

This low consideration is driven by low exposure to EVs.

Have driven an EV by HHI:

9%	< £40k
> £40k	22%

Greatest influence on each group

Seeing EVs on the street:

< £40k	33%

Knowing someone who drives one[6]:

> £40k	40%

With the Office for National Statistics (ONS) reporting the median household income as £36,663 in 2024, this roughly aligns to the average UK household.[5]

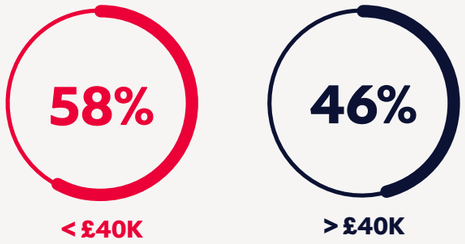
This lower awareness and consideration of EVs puts us at risk of developing a two-tier society, with wealthier neighbourhoods enjoying cleaner air, quieter roads and cheaper vehicle running costs.

3. All data in this Report is from the No Driver Left Behind 2.0 research September 2025 - 2,600 responses, in a nationally representative survey, conducted by QuMind on behalf of Autotrader
4. All quotes in this Report are from the No Driver Left Behind 2.0 qualitative research November 2025. 150 respondents
5. https://www.ons.gov.uk/peoplepopulationandcommunity/personalandhouseholdfinances/incomeandwealth/bulletins/householddisposableincomeandinequality/financialyearending2024 <accessed Nov_25>
6. Vs 28% for HHI <£40k

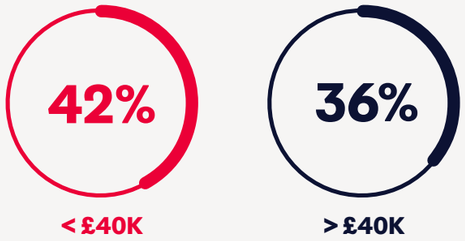
Lack of exposure means their perceptions of the barriers surrounding EVs are higher.

"No experience [of EVs], it's hard to comment." (Age: 64)

EVs are expensive:



Charging infrastructure is insufficient:



Solution

1. The used EV market

Whilst we can't alter income levels, we can get this group ready for when the used electric market has something to offer them that fits their requirements.

To understand when that might be, we need to ask how much this group spends on their cars:

Car budget	< £5k	£5k-£10k	£10k-£15k	£15k-£20k	£20k-25k	£25k+
% of HHI £40k – who buy in this price bracket	39%	21%	15%	7%	6%	11%
% of used petrol stock on Autotrader	15%	20%	22%	19%	10%	14%
% of used EV stock on Autotrader (2025 overall)	1%	4%	17%	19%	15%	45%

With just 5% of all used electric stock currently priced £10,000 and below (while there is 7x more choice in petrol cars), availability is clearly impacting affordability. As the used electric market matures even further and we have a wider range of ages and price points available, this group will be more likely to be able to afford to go electric.

In 2025, the average price of an EV aged between 5-10-years-old was £14,654. By 2030, we expect vehicles within this age group to increase eightfold – exceeding 1 million cars in the Great British car parc.

2. Running cost savings

Almost half (45%) of this group told us that assurances they would be able to charge EVs conveniently would help to improve their consideration.

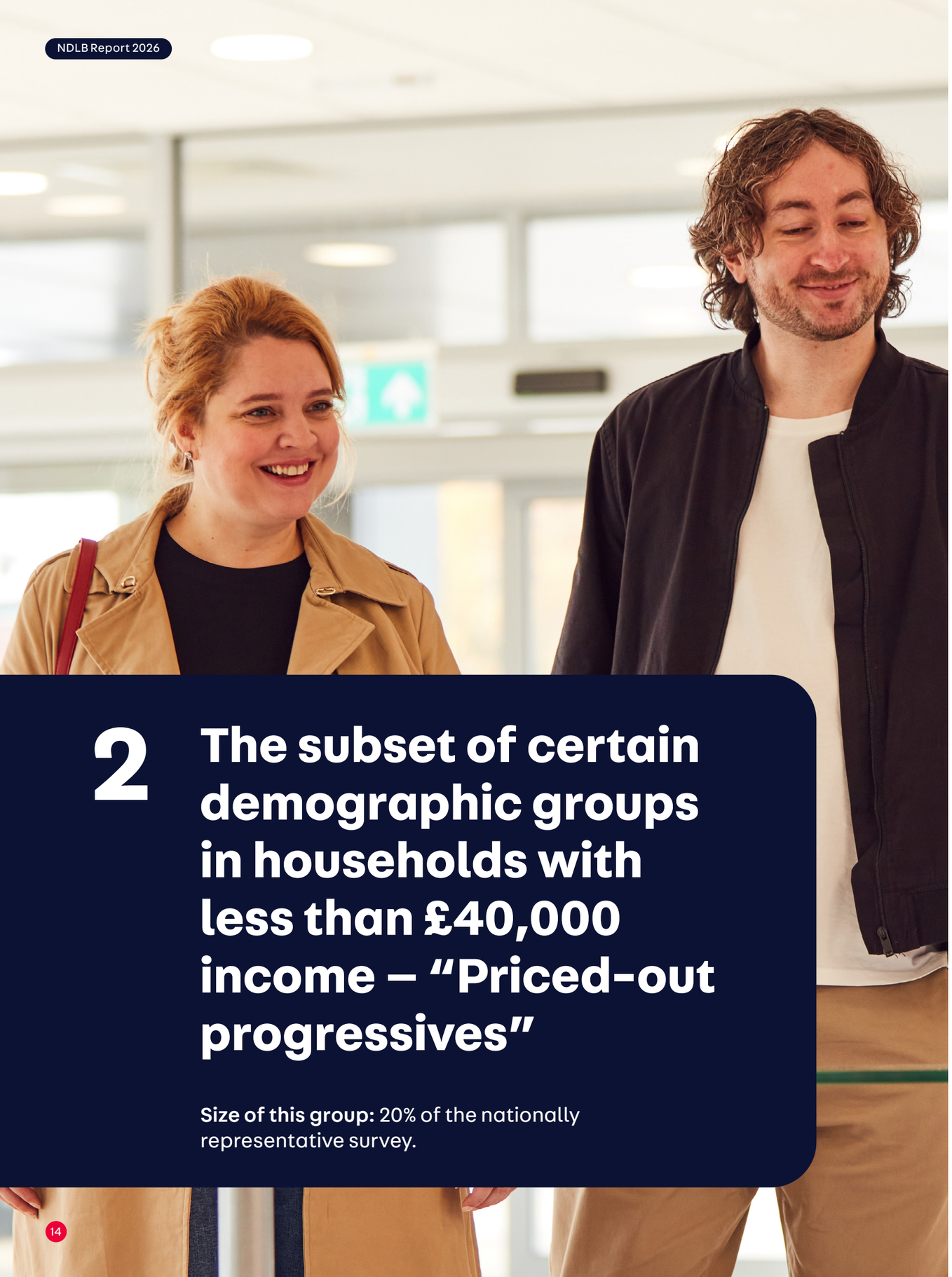
As 70% of this group can park off street, a focus on communications about running cost savings - £1,500 if you can charge at home[7] - is vital.

3. Social proof

As we approach the tipping point of electric adoption there will be more on the roads, people will be more likely to know someone with an EV, and we'll see them play a bigger role in culture.

All of this will support this group who tell us they have fewer sources of information about EVs[8].

7. Electric cars: The Facts, sourced by the **Department for Transport 2025**
8. One example of this is in television, check out the **Climate Content Pledge**



2 The subset of certain demographic groups in households with less than £40,000 income – "Priced-out progressives"

Size of this group: 20% of the nationally representative survey.

Risk: We have people who want to make the switch but can't afford to.

We know income can be a strong marker of someone's EV consideration, but as income doesn't define a person, there are pockets of people within this group who are strong electric considerers. They are demographically very similar to those who identify with the progressive mindset – but without the income.

Who are they?

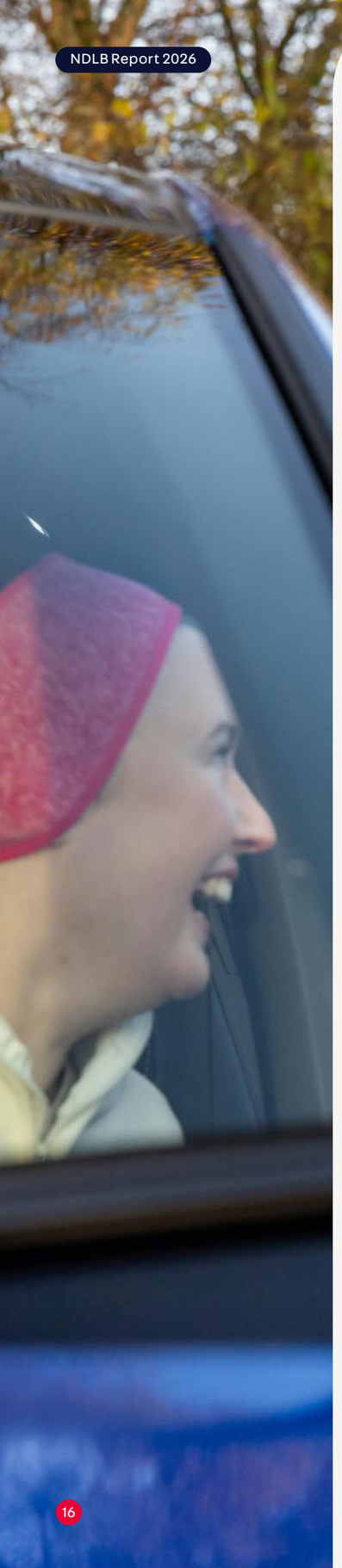
This group is more likely to:

- **be younger (17-34)**
- **be ethnically diverse**
- **live in the centre of a large city**
- **be tech savvy**
- **have a progressive mindset**

"I want an electric vehicle as it's going to be cheaper and better for the environment." (Age: 41)

Sizing the subsets within the £40,000 and below population:

Demographic	% of group who would consider an EV	% of population
17-34	72%	7%
Ethnically diverse	80%	4%
Centre of large cities	73%	4%
Tech savvy	65%	7%
Progressive mindset	68%	7%



What are their top barriers to going electric?[9]

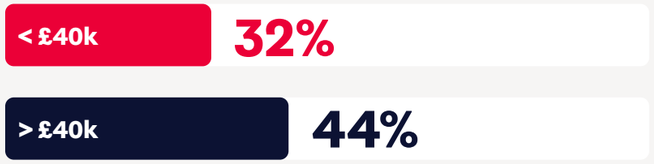
1. Expensive to buy – 44% agreed
2. There aren't enough public charging points – 31% agreed
3. Public charging points are expensive – 26% agreed

These barriers align with the generic consumer concerns, so to understand this group more, let's compare them to their wealthier counterparts.

How does this group compare to EV considerers with HHI above £40,000[10]?

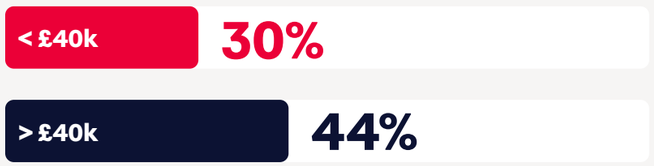
i) EV exposure

They are much less likely to know someone with an EV than those with incomes above £40,000:

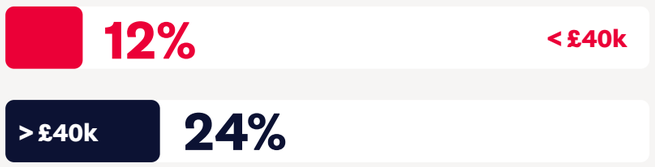


They're also less likely to consume content about electric vehicles:

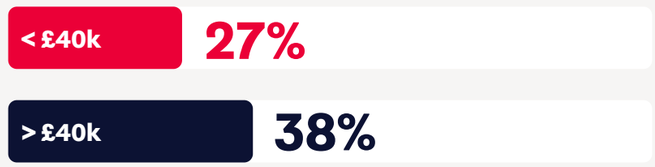
"I have read or watched reviews online."



"I follow influencers or public figures who drive electric cars."



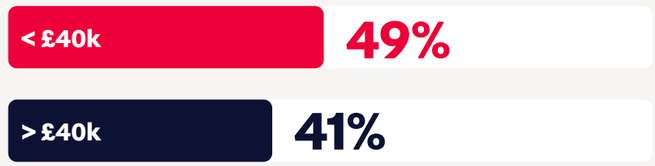
"I have heard/read media stories or news reports about electric cars."



"I don't think I need convincing, it's the better option for the next generation."

ii) EV barriers

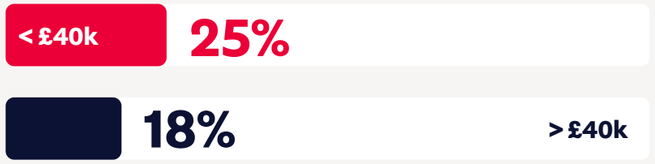
Both HHI groups cite the upfront cost of EVs as the no.1 barrier to going electric:



9. EV considerers with household income below £40,000 – 527 respondents
10. 527 EV considerers with HHI below £40,000 and 1,050 EV considerers with HHI above £40,000

The biggest difference between the two groups is in knowledge about EVs:

"I just don't know enough about electric vehicles."



Solution

As with the previous group, the growth of affordable options in the used electric market will be transformational for how these folks can access e-mobility.

There are other solutions to consider:

1. Battery confidence

62% of this group told us confidence in battery health was important.

Whilst the industry has been providing a variety of solutions to this issue, the government have a role to play in centralising and maintaining a data ecosystem similar to the MOT data, now managed by the Driver and Vehicle Standards Agency (DVSA).

Lower income households are also more likely to use pre-payment electric meters[11], which will mean requiring cash upfront, rather than adding up to a monthly cost – this may impact how easy it is for them to go electric.

11. The Resolution Foundation said 25% of the poorest fifth of families pay for their energy with a prepayment meter, compared with just 1.5% for the richest fifth of the population, December 2024

2. Off-street parking solutions

Although the majority (70%) of households with income below £40,000 have off street parking, we shouldn't forget those who don't.

The government consultation on cutting red tape for those without off-street parking (announced in November 2025) is a fantastic opportunity to remove barriers to electric adoption for a big portion of UK drivers. If these barriers were removed, we could prevent the growing divide between people who have access to private charging at home and those who do not, helping to avoid a two-tier society when it comes to the cost of EV charging.

For many reasons, the cost of public charging will always be more than private charging, even if you include at-home installation costs. According to Zapmap, the average price of the slower public charging options in November 2025 was 17p compared to 6p average for at-home charging.

This may seem small, but it can quickly add up and it's an in-built, systemic inequality – if you can't charge from your home, you simply cannot access what you need to move your car at the cheapest rate that others have access to.

Even considering community solutions where people share private charge points with neighbours, you'd have to hope they weren't charging any extra on top. We need clear and decisive government action on this inequality.

3 Those with traditional mindsets and higher household income – “Familiarity firsts”

Size of this group: 14% of the nationally representative survey.

Risk: This group of people can afford EVs, and would suit them, but mindset is stopping them.

Traditional Vs Progressive mindset with HHI above £40,000 - electric consideration[12]:

In a direct reversal of the previous group, these drivers show that electric adoption isn’t clear cut. Just because EVs might suit their budget and lifestyle, it’s not guaranteed that they’ll buy.

Previously, the industry has been assuming that once people can afford to go electric, they will - but this research uncovers that that isn’t the case for a specific group. This research shows that, despite any demographics, the ultimate difference in likelihood to buy is someone’s mindset.

12. Would consider an electric vehicle, NDLB 2.0 Research 2025

How did we identify who fell into which mindset group?

By asking a series of questions around attitudes and priorities, the data showed clear groupings of those with different mindsets. Below is the level of agreement each group showed with the statements:

	Progressive	Traditional
Tackling climate change should be a top priority for the UK	**96%**	**13%**
I feel optimistic about the future of the UK economy	**71%**	**6%**
The government should do more to reduce the gap between rich and poor	**90%**	**58%**
I trust government institutions	**54%**	**18%**
Environmental concerns influence my day-to-day life	**93%**	**9%**
I embrace change and progress	**94%**	**38%**

"Unsafe, expensive fire traps that quickly devalue and expensive insurance." (Age: 55)

"I hate them...dangerous firebombs full of toxic compounds - awful for the planet!"

What impact do these views have on EV consideration?

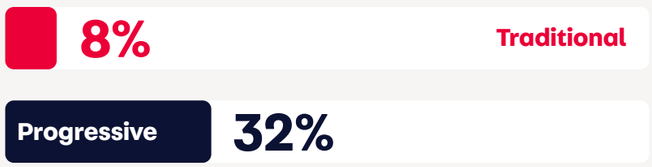
Traditional mindset consumers think a particular way and have strong views. They don't believe tackling climate change is a top priority, and environmental concerns don't influence their day-to-day life, so it's no surprise that they have such low EV consideration.

They're sceptical about the environmental benefits of EVs - a quarter strongly disagree that EVs are better for the environment.

They don't trust government institutions, so any incentives or government schemes likely won't sway them[13]:

They're more likely to view EVs negatively:

Those who think EVs are stylish:



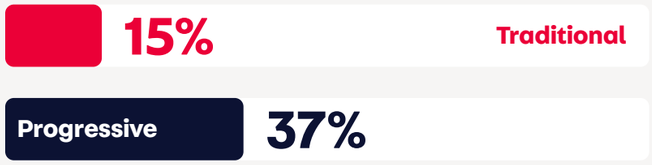
13. 'I trust government institutions' - strongly disagree with this statement

"Nothing whatsoever [would encourage me to consider an EV in future] as the information put out does not give the full truth." (Age: 59)

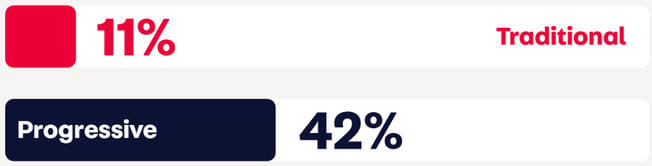
"Not one single thing would encourage me to waste money on an EV." (63)

"My family are too precious to cart them around in a giant potential deathtrap firework." (56)

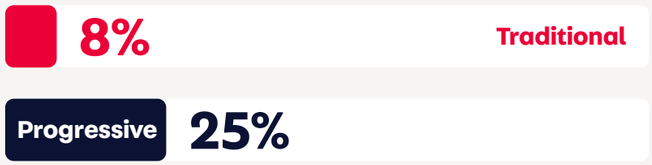
Those who associate EVs with the future:



Those who associate EVs with innovation:



Those who think EVs are powerful:



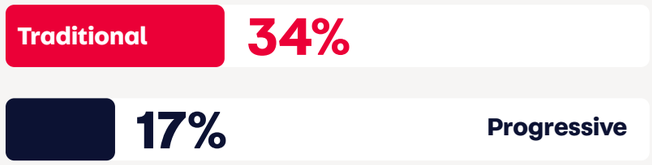
They have a fairly strong stance against EVs:

21% say there's no additional info they'd need that would make them consider buying one.

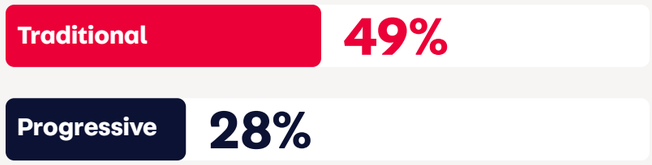
38% say none of the reasons we tested were reasons for them to consider buying an EV in the future.

They also feel more strongly (and negatively) about charging and range:

"They are difficult to charge."

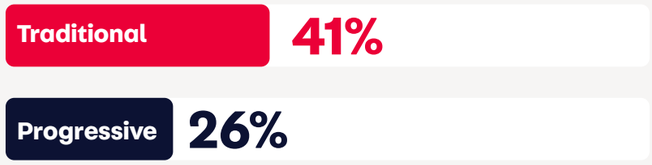


"There aren't enough charging points."

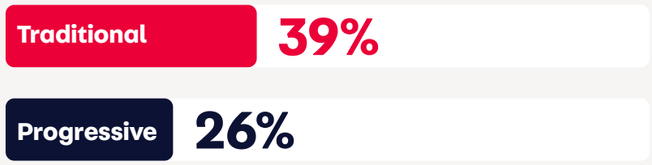


"Nothing [would encourage me to consider an EV]. I will never buy, until legally have to and by the time that comes along will most likely not be driving." (69)

"Public charging points are expensive."



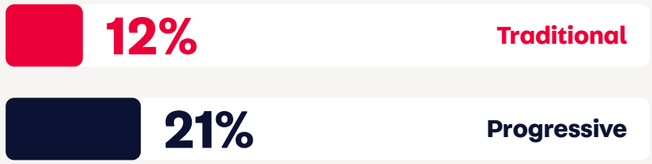
"They take a long time to charge."



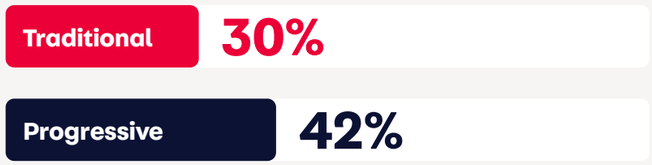
And they're more likely to think EVs are expensive, with over half (57%) strongly agreeing that 'EVs are expensive' compared to over a third (39%) of progressive mindset buyers.

However, less exposure to EVs may also be contributing to their negative views, causing them to get left behind:

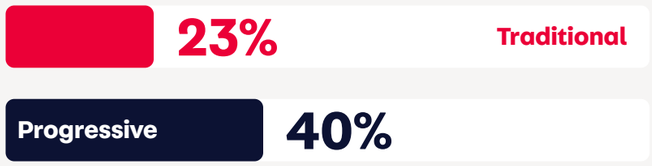
Have driven an EV:



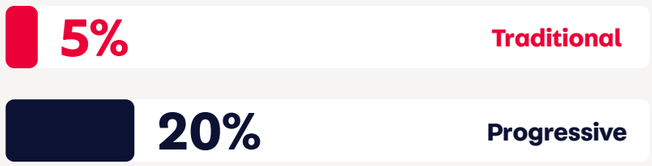
Often see EVs driven around:



Have watched/read EV reviews online:



Follow influencers/ public figures who drive EVs:



"Nothing would entice me to get an electric vehicle, not even if i was offered one for free." (Age: 70)

Solution

We looked to the work of More in Common, a thinktank which has produced The Seven Segments of Britain[14] which categorises citizens based on their views and attitudes, much like we've done with the mindset work in this Report.

When exploring the "dissenting disruptors"[15] group, which seems the most like our traditional mindset group, they identify a few key points:

- **This group makes up 20% of the population**
- **They are distrustful of institutions**
- **92% of this group are white**
- **They don't trust mainstream media – older segment is primarily using outlets like GB News and the younger segment is getting information from social media**

So, with a greater understanding of this group, what can be done?

If mainstream media and institutions such as the government aren't likely to reach this group, it's important to look to alternative communication channels. With social media playing such an important role in their information ecosystem, perhaps a targeted influencer programme could be helpful.

More in Common write "they believe in hard work and feel that the reward should be being able to keep more of your money" so maybe a focus on the overall running cost savings messages could be powerful, but with a specific slant on the messaging.

For the electric vehicle sector, it's helpful to approach this group with empathy to understand their point of view. When comparing to other technological advancements (the smartphone and broadband) where incumbents were close to obsolete by the time they were taken over, internal combustion engine cars are still able to fulfil their objective – to get you where you want to go.

And so, in the example of electrifying our roads, the distinction between legacy technology and newer solutions that provide transformative benefits is less pronounced for some people. Whilst the previous technology still feels viable, this group feel forced into a choice that doesn't align with their interests or their preferences.

There are no clear cut solutions for this group, but awareness is the first step in understanding the impact they might have on the success of mainstream electric adoption.

14. https://www.moreincommon.org.uk/seven-segments/ accessed 18th November 2025
15. https://www.moreincommon.org.uk/media/qmkks3pv/dissenting-disruptors.pdf accessed 18th November 2025

Conclusion

This Report is intended to change the way we all think about EV buyers - from an either/or view (do they have a driveway or not?) to something a bit more rounded. Looking at certain demographics, we might assume to understand someone's propensity to consider electric, but there are more factors at play.

Mindset and attitudes play a major role in electric consideration and in many cases, these can override financial or logical reasoning.

In the early stages of adoption, there were lots of practical, real-world issues, but as we overcome these for more and more drivers, who is left and what's stopping them?

Misinformation has plagued EVs and previous research has found that it has directly impacted consumers' likelihood to go electric. To combat this, we've joined forces with the SMMT and ChargeUK to produce **The Facts**, a set of user-friendly facts about electric cars, endorsed by the Department for Transport.

When it comes to affordability, we know a maturing used electric market will soon offer cars at a wide range of prices, meaning we're getting closer and closer to having an EV for everyone.

But what of those who aren't interested?

Well, that's their choice – but with £1,500 possible running cost savings per year, the sector has a role to play in ensuring everyone is aware of the potential benefits, so that no driver is unknowingly left behind.

Taking action

What can government do?

1. **Support the used EV market**
2. **Remove barriers to those without off street parking from installing home chargers**
3. **Support the charging industry to reduce the cost of electricity**
4. **Equalise VAT on private and public chargers**

What can industry do?

1. **Focus on affordability**

   For manufacturers, thinking about what cars you're offering in which price range.

   For retailers, showcase the range of affordable used EVs that consumers might have low awareness of.

2. **Take a holistic approach to retailing and marketing EVs**

   Think at home charging, on the go charging, total cost of ownership benefits.

   Understand how driving usage and requirements might benefit from the switch to electric.

3. **Create product confidence**

   What warranties are you offering, how are they marketed?

   What's your approach to state of health information for the battery? Lower income households are needs-first, they have to be able to trust that the car they buy can meet their needs.

What do we plan to do?

1. **Improve on-site information about used EVs**

   From where EVs appear in search, to how we display battery health information, we're looking at all the ways we can make EVs, and especially used EVs, a more visible and appealing choice.

2. **Supporting retailers to make the switch**

   Through in-person events, online training materials and plenty of fresh market data, we're supporting independent retailers who are making their first foray into the world of electric vehicles.

3. **Reaching more consumers**

   Our focus is on promoting the benefits of used EVs to as many consumers as possible, we'll use the segments identified in this research when targeting our marketing material.

4. **Continue with our myth busting work The Facts**

   We know EVs aren't right for everyone right now, but there are plenty of people who are being held back from electric vehicles due to misinformation.

We've partnered with organisations across the industry to champion The Facts – get involved!

Autotrader