

The road to 2030: Is the Government on track to meet its EV ambitions?



The EV transition at a crossroads

MARC WOOLFSON
Founding Partner, WA



The policy environment for electric vehicles has long been a fraught and contested area – it is subject to the shifting priorities of national Government, variation of implementation at local level, significant politicisation and major reputational challenges.

All of which is occurring whilst major shifts occur in the global supply chain and international trading patterns bring new entrants into the UK market.

With such a complex backdrop, both business buyers and retail consumers can often be left puzzled and bemused by conflicting messages and unsure when to make the shift away from their traditional petrol or diesel cars. This is a significant challenge that must be addressed head-on if the UK is to achieve a successful, fair and sustainable transition to EVs, with the 2030 target for the end of new ICE vehicle sales approaching rapidly.

To explore these issues in detail, WA Communications has commissioned exclusive nationally representative public polling from YouGov and brought together an expert panel of distinguished industry experts and political leaders.

Some key takeouts from our analysis include:

Sir Philip Rutnam's expert insights on what matters to the differing agendas at play between Department for Transport, HM Treasury and No10 as they grapple with the need to protect the UK's automotive manufacturing base, maintain a sustainable tax base, attract international investment and build constructive trading partnerships. With the review of the ZEV Mandate brought forward to this year, these issues will be front and centre for policymakers.

WA's analysis of the **YouGov polling** which highlights some stark differences between Reform voters and other party supporters. With Reform's leadership on record as intending to scrap the ZEV Mandate as part of a radical shift away from the net zero agenda, the views of their supporters indicate a lack of support for EV targets overall and a specific opposition at a local level for residential on street charging. This divergence of opinion should be of direct interest for all those involved in the sector, with the local elections in May this year and both Reform and the Greens on track for a more influential presence in local government.

The polling also shows a public unsure who to trust for reliable information on EVs – justifying the Government's investment in their recent Electric Feel campaign – but also showing there is a long way to go to dispel myths and instil confidence in consumers to make the switch. Interestingly for the sector, the public seem attracted to the use of innovative technology from new Chinese market entrants but also perhaps more likely to turn to traditional OEMs for a more dependable support and maintenance network.

Overall, the data shows far from a settled public consensus on whether the 2030 target is desirable, especially if the cost of an EV remains high. With the public split on this, there is the possibility that it becomes even more of a political dividing line in the run up to the next general election, and in the shorter term increases the pressure on the Government to address the affordability gap rapidly.

It is clear that the UK's EV market feels like the Government is listening and importantly acting on some of their concerns. However, the impending introduction of the new eVED scheme has weakened confidence and delivered some conflicting messages at the same time as the Government is trying to stimulate demand. Many in the industry will feel this is unhelpful, when they are investing themselves in efforts to combat myths and some biased reporting.

To keep the market moving forward, and drive take up, there are some clear priorities emerging. Consistency of policy, taxation and funding stability for incentive schemes; action to address structural blockers for people without driveways, in rented accommodation or in blocks of flats; moves to support the used market and in particular to dispel concerns over battery health.

In summary, there is a lot to unpack. The industry has good reason to be encouraged by the latest data on charging infrastructure rollout, but with EV registrations lagging behind target, there is a very long way to go and a lot to do on the way to 2030.

To discuss how your organisation can shape and advance the EV transition debate, please contact **Marc Woolfson** at MarcWoolfson@wacomms.com.

How government departments will shape the EV transition

SIR PHILIP RUTNAM

Chair, WA Advisory Board –
and former Permanent Secretary,
Department for Transport



So what could EV policy look like in the remaining years of this Government? In my experience it's useful to think about the likely dynamics across different departments.

There's no doubt about the strategic commitment of the Government to the EV transition. And that's not just because of the Manifesto commitment: almost all senior Ministers get the powerful combination of industrial and environmental policy at work here. But the truth is that strategic commitment can play out in very different ways depending on your perspective.

Take the Treasury. Treasury officials have never lost their scepticism about industrial policy, and both Treasury Ministers and officials are focussed on two key financial metrics: the cost of promoting EVs (vehicles and charging infrastructure), and the prospect of losing huge revenues from fuel duty. The risk is that they seriously underestimate the impact of acting too soon to cut subsidies and raise revenues.

Good evidence about consumer response could help here, but so too could raising awareness of the risk of introducing new taxes that are not fully thought through – plus anything that helps join up Government thinking on 'tax' and 'policy'.

The challenge at DfT is different. This is a department focussed on delivery, with short-term targets to oversee in the ZEV mandate. Will they have the bandwidth needed to focus on the harder, long-term issues that still need to be fixed to achieve the transition proper, not just the targets? Like delivering real solutions for the large share of the population that can't charge privately. Like ensuring chargepoints are really accessible and deliver a consistently good consumer experience. And dealing effectively with the Treasury's focus on cutting costs and protecting revenue.

Finally, No10. This is where I see the greatest risk of policy being destabilised by electoral politics and the threat from Reform. Expect acute anxiety about being seen to load more cost onto car owners. Expect more attention than you'd imagined to what's happening outside Europe, and the risk of our transition stalling. And expect to have to respond regularly to all this anxiety – by explaining compellingly, reassuringly, the scale, momentum and confidence we can have in this transition.

Public opinion: Attitudes to the EV transition

WA commissioned polling with YouGov to explore the public's perception of a range of important factors relating to the EV transition, including public charging priorities and affordability, brand reputation, and sentiment towards the existing targets. The results show that the public remains cautious – and often either largely undecided or unaware – when it comes to these issues.

The research highlights that work still needs to be done to build consumer confidence, with few seeing industry or Government as the “most trusted” source of information on EVs. There is some clear variation between supporters of different political parties, with Reform UK voters considerably more sceptical of EV transition targets than the public as a whole, and Labour and Liberal Democrat voters more favourable towards residential charging. Voters appear to coalesce on the need for more retail and motorway service area charging and the need for parity in costs between public and domestic charging.

All figures, unless otherwise stated, are from YouGov Plc. Total sample size was 2,024 adults. Fieldwork was undertaken between 29th - 30th January 2026. The survey was carried out online. The figures have been weighted and are representative of all GB adults (aged 18+).

Few see the industry or government as the ‘most trusted’ source of information on electric vehicles

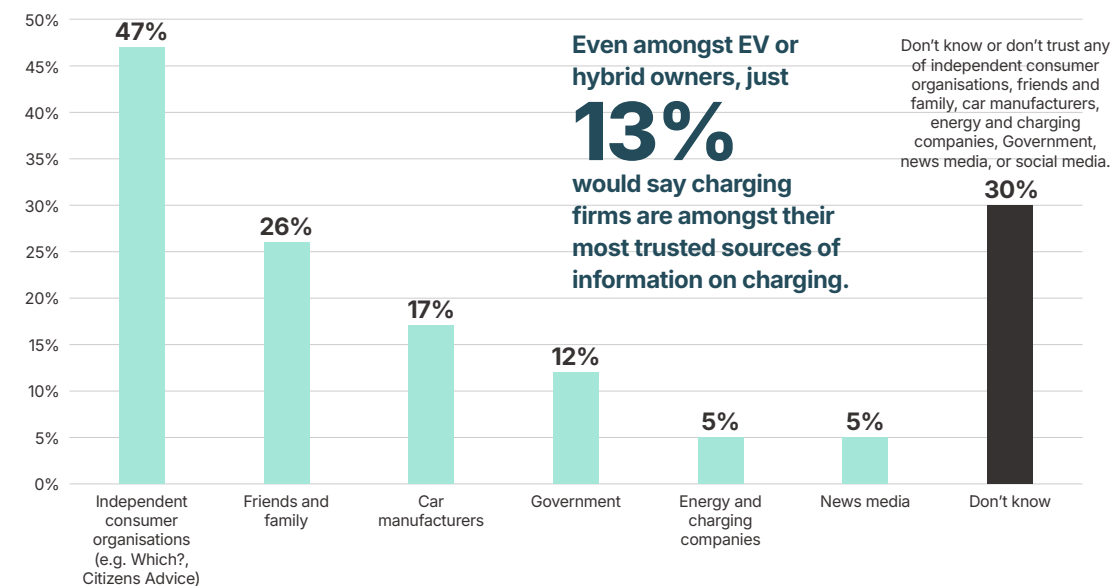
Just 17% of respondents say they rank car manufacturers as “the most highly trusted” source of information about EVs, and only 5% of the public put their faith in energy and charging companies.

Consumer advocacy groups represent the most trusted sources, followed by friends and family. Almost one-third of the public don't trust (15%) or have an opinion (15%) on any of the sources of information that were presented.

WA analysis: It is significant that more than twice the number of respondents who rank Government information as the most trusted source, rank information provided to them by friends and family as most trustworthy, demonstrating the influence of lived experience.

With the Government having launched its ‘Get that Electric Feeling’ campaign this January (after this polling was commissioned) there is clearly awareness within the Department for Transport that a steady stream of reliable information is required to bring more drivers on the side of the EV transition.

Which of the following sources, if any, would you trust most for information about EVs and charging?

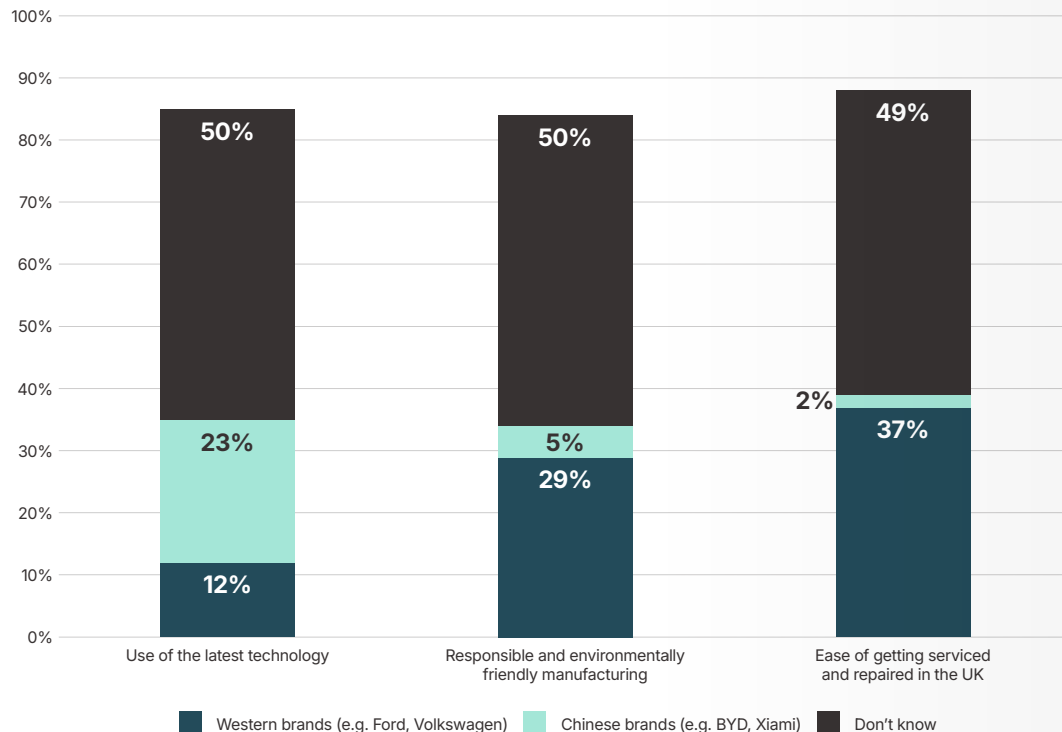


Chinese EVs are most associated with use of the latest technology, and Western brands are seen as being easier to maintain in the UK

When it comes to public perceptions of Western and Chinese brands, Chinese EVs are seen as having an edge over use of the latest technology. However, Western EVs are associated with more environmentally friendly manufacturing and being easier to service and repair in the UK.

WA analysis: While Chinese and Western EVs have some degree of reputation, almost half of respondents do not have a perspective on any of the categories. This implies that around half of the public are yet to be influenced by marketing campaigns nor has brand reputation received significant cut through when it comes to the EV market.

Do you think established western car brands (e.g. Ford, Volkswagen) or new car brands from China (e.g. BYD, Xiaomi) perform better on each of the following attributes?



Charging priorities are local and practical – but there are political challenges ahead

Who's seen as most responsible for making sure the UK has enough reliable EV charging points?

The public see national Government as primarily responsible for ensuring the UK has sufficient public chargepoint access. Although more respondents believe the onus is on central and local government to work in partnership with industry.

WA analysis: The public recognises the complexity of EV chargepoint delivery and expects Government to work in tandem with industry to provide the appropriate solutions. Respondents are considerably more likely to associate responsibility with central Government over Local Authorities, potentially a reflection of large swathes of the public being unaware that authorities have a role to play in the delivery of public charging. This also potentially minimises any public backlash against authorities that do not take full advantage of support available to them, such as the Local EV Infrastructure fund (LEVI).

Which of the following, if any, do you think is most responsible for making sure the UK has enough reliable EV charging points?

26%
National government

7%
Local councils

2%
Private charging companies

35%
A combination of industry partners, including those already displayed as well as energy firms and car manufacturers

Which locations should be prioritised for more EV charging infrastructure?

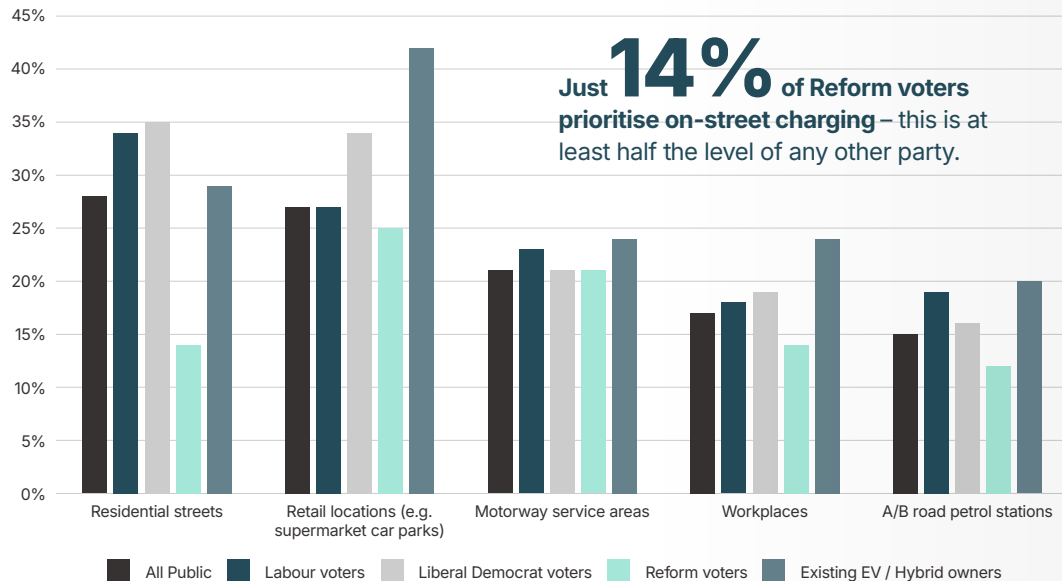
Residential streets, retail locations (e.g., supermarket car parks) and motorway service areas are respondents' top priorities for public EV charging, with existing EV and Hybrid drivers signalling a preference for greater provision at retail parks. Support for residential streets notably halves among Reform UK voters (14%) and is strongest among Liberal Democrat (35%) and Labour voters (34%).

WA analysis: There is a cross-party consensus that retail parks and motorway service areas are important priorities for public chargepoint provision, suggesting these are the safest destinations to target to boost satisfaction towards public EV charging.

The data also implies that existing EV and Hybrid drivers are somewhat dissatisfied with current charging provision available at retail locations.

Across all party allegiances, Reform UK voters stand out for their differing, less favourable opinion towards the prioritisation of residential street charging, with Liberal Democrat and Labour voters most likely to favour this type of infrastructure. This could be a reflection of these voters being more likely to favour an equitable transition, with more community-based facilities. It is also important for businesses that provide on-street charging in terms of identifying their target audience, and who their infrastructure resonates with best.

Which of the following locations, if any, do you think should be prioritised for more electric vehicle (EV) charging infrastructure?



Should domestic and public charging cost the same?

Across voters of all parties – 50% of the public who had a view (excluding “don’t knows”) believe that public and domestic charging points should cost the same to use.

But of those who say there can be a price difference:

Labour voters are notably more likely to say that public charging should be cheapest compared with other parties. Green voters are the least likely to say that domestic charging should be the cheaper option.

WA analysis: Those on the left of the political spectrum (Labour and Green) are more likely to support cheaper public charging than other political parties. However, there is a degree of political consensus when it comes to charging affordability, with voters across all parties surveyed believing that domestic and public charging should cost the same.

This sits against a backdrop of sustained pressure on Government to equalise the VAT on public and private charging as a means of making public charging more affordable. A recent tribunal brought about by Charge my Street has ruled that public charging should be subject to the reduced 5% rate of VAT.

Thinking about the cost of charging an EV, which of the following comes closest to your view?

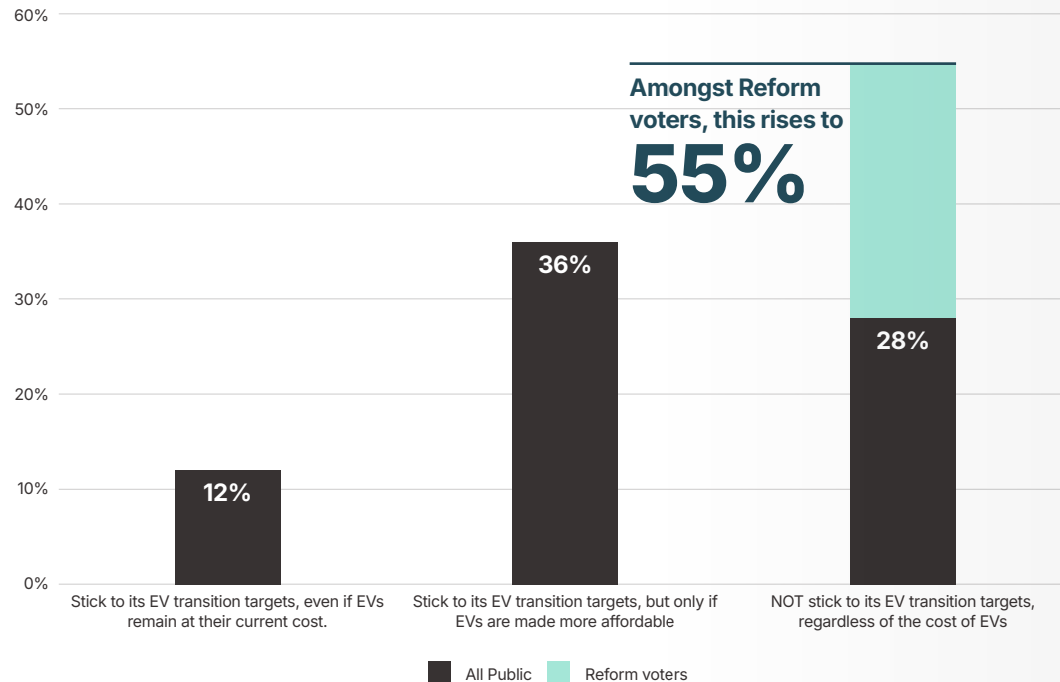
	Conservative	Labour	Liberal Democrat	Reform UK	Green
Public and domestic charging points should cost the same to use	44	40	46	35	45
Public charging points should be cheaper to use than domestic charging points	8	14	6	8	7
Domestic charging points should be cheaper to use than public charging points	30	25	29	27	20

The pace of the EV transition remains a contested issue and affordability is a deciding factor

More than a quarter of the public are opposed to EV transition targets, regardless of whether the cost of an EV becomes more affordable. More than a third are of the view that the Government should stick to its targets, on the contingency that EVs do become more affordable. Another 25% of respondents "didn't know" enough to form a perspective.

WA analysis: With 28% of respondents opposed to the current targets, support for the EV transition is clearly fragmented, with affordability being the most decisive factor. Reform UK stand out as an outlier in terms of opposition towards the current targets, nearly double the amount of the public as a whole, which could create some degree of instability for the transition as we look beyond the next General Election.

Thinking about the UK's transition to EVs, which of the following comes closest to your view?
"The UK government should..."



Driving consensus

PERRAN MOON MP
Chair of the EV APPG



As Chair of the All-Party Parliamentary Group on Electric Vehicles, my priority has been to bring together leaders from manufacturing, retail, infrastructure, finance, and consumer advocacy to take stock of the EV landscape and chart a path through a period of uncertainty.

Across these discussions, several clear points of consensus have emerged. Chief among them is the need to support the Government's ambition for the transition. There is also broad consensus on the urgency of resolving implementation issues associated with eVED. Where gaps remain is around the trajectory of the ZEV mandate, with businesses calling for policy clarity and long-term consistency.

A continuing challenge highlighted by the public charging sector is the accessibility of LEVI funding. Local authorities remain under-resourced due to wider pressures on service delivery, and while industry is making rapid progress, too much of the available funding is still effectively locked away.

From a rural constituency perspective, the picture is more complex. While many rural households are structurally better placed to access lower-cost home charging, rural drivers typically travel longer distances, which can offset that advantage. The transition to eVED as a flat tax has also generated confusion regarding vehicle eligibility, timelines, and how the system interacts with real-world purchasing decisions.

More broadly, the UK has a strategic opportunity to lead in the critical minerals essential for EV batteries. Strengthening domestic supply chains - across extraction, processing, and recycling - will be vital if we are to seize the industrial opportunity at hand and position the UK as a resilient partner in global battery manufacturing. Achieving this will require a genuinely pro-investment industrial approach, working alongside public finance institutions such as the National Wealth Fund to crowd in private capital at scale.

Are EVs really an urgent tax threat?

TOM RILEY

Journalist and author of the Fast Charge newsletter



A 2024 report by the IPPR suggested up to eight million UK jobs could be exposed to automation because of AI. Since then, warnings about the labour market impact of artificial intelligence have only grown louder.

You might therefore expect policymakers to be asking a simple question: what does this mean for the public finances? After all, if AI begins to significantly reduce employment or wages in certain sectors, that has implications for income tax receipts, national insurance, and the long-term sustainability of the tax base. Right?

Yet, to my eyes, there is no serious conversation inside Whitehall about taxing AI-driven productivity gains. No consultations. No exploratory policy papers. Nothing. Instead, the Government is throwing its arms around AI and its potential for the UK.

And now let's contrast that situation with their approach to electric vehicles. Before EVs have even reached mass adoption, Labour is hoping to introduce electric Vehicle Excise Duty (eVED) to replace lost fuel duty revenues. I find this bewildering.

EVs deliver clear public benefits. They reduce urban air pollution, which is associated with around 43,000 deaths in the UK annually, they help decarbonise transport, and we can actually make them in our country. In time, they could reduce the UK's exposure to global energy prices.

Just imagine it. You see the BBC alert that a world leader has gone mad, but you don't have to panic about oil prices, because we don't need it. Martin Lewis would be out of work.

The government clearly recognise this. Otherwise, it wouldn't be putting so much money behind grants and campaigns. So why then, just as EVs started to get traction, is it scoping out how to tax them?

Understandably, businesses in the EV sector are furious. As are car manufacturers, and current EV owners. And what about future drivers? One survey this month suggests 55% won't switch to electric yet because of eVED.

It is an odd situation that the Government is willing to hurt something positive, meanwhile, support a technology that could do vastly greater harm to its revenues.

A snapshot of developments shaping the direction for 2026

CLAIRE MILLER

Mobility and Energy Advisor



The headline news in public charging is the recent First-tier Tribunal (Tax Chamber) ruling - brought by community charging provider Charge My Street - that the 5% VAT rate should apply to public EV charging for individuals charging under 'de minimis' limits and not the current 20%. HMRC has a period of time to appeal, but if upheld and applied broadly it would materially reduce the cost of charging for drivers who rely on the public network.

Meanwhile, there was a welcome announcement that five of the remaining grants for the installation of domestic charger points were to be enhanced and extended for another year, to March 2027. Naturally, there was some frustration that the 'Electric vehicle chargepoint and infrastructure grants for landlords' grant is to be withdrawn. Given the need to encourage more people to go electric, and against the backdrop of the government's 'Electric Feel' campaign that launched in January, the withdrawal of this specific support may prove to be premature.

Government recently added £18m to the Plug-in Van and Truck Grant but only extended the scheme until the end of March 2026. The amount of direct support has increased across vehicle types significantly, with up to £120,000 for eHGVs, creating industry speculation that there is more to come. This optimism continues with hopes of a follow-on to the Depot Charging Fund, to enable more fleets to deploy charging to support the adoption of electric vehicles in their businesses.

Minister for Decarbonisation Keir Mather commented on the announcement at the time, stating that Government is “backing British businesses to go green by making electric lorries more affordable, helping hauliers to make the switch whilst turbocharging growth, investment and jobs in the sector.” Elsewhere, British businesses in charging hardware and software may hope to be similarly recognised as, to date, there has been no requirement for central or local government to “back British” in procurement processes - an opportunity for future funding schemes to consider.

While low BiK tax rates continue to support growth in Salary Sacrifice, uncertainty around eVED announced in the Autumn Budget continues to undermine consumer confidence and could limit the potential impact of the Electric Car Grant on new vehicle uptake. Industry has a small window of opportunity left to submit views to the consultation, which closes on the 18th of March. Meanwhile, there remains no direct support for used vehicles in England and Wales, while Scotland enjoys an interest free loan scheme for used cars and vans, and no visible progress on one of the key drivers of consumer confidence to buy used, battery health certificates (a manifesto pledge no less).

Industry has had some assurance of the government's ongoing commitment to maintain the ZEV Mandate, with reassuring words from Government Whip Baroness Blake who emphasised “the most important thing we have to do is work with the manufacturers in this country.” She criticised the “wave of uncertainty” triggered by the previous government when it altered the ZEV Mandate target, committing this government to maintaining “that certainty and clarity.”

As we head into Spring this dynamic tension of support and incentives vs mandates and regulation continues to keep the UK on track with the transition to transport electrification. Impressive progress has already been made: 1.85m battery electric vehicles on the road, over 118,000 public chargers, one in twenty car miles in the UK now driven electric. And with every vehicle electrified comes carbon saving and cleaner air too. As we move towards the next phase of growth, industry can be cautiously optimistic that this Government will continue to maintain the steady course needed for investors and consumers alike to keep going electric.

About WA

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We're integrated in approach, bringing together public affairs, corporate communications, digital, research and creative services.

We're specialists in sectors where government action, media interest and public impact are often interlinked, including energy, education, financial services, healthcare and transport.

Our clients, whether global giants, leading charities or blue-chip brands, come to us for help navigating the complex communications challenges of these multi-stakeholder environments.

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contact@wacomms.com
wacomms.com