

RESEARCH SUMMARY

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| Title | The Market Opportunity for Electric Cars for disabled Drivers | | |
| Objective | Explore the current landscape and attitudes of Blue Badge holders towards electric vehicles and plug-in hybrids and to assess potential adoption | | |
| Date | 11/02/2016 | Agency | 2CV |
| Methodology | An integrated qual/quant methodology <ol style="list-style-type: none">1. 3 x expert interviews provide insights into the EV market and specific needs of Blue Badge holders2. 6 x with Blue Badge holders (inc 4 x EV test drives)3. 4 x Brightspot interviews with existing EV/PHEV owners & Blue Badge holders4. Online quantitative survey of $N=445$ with Blue Badge holders, older drivers and general population | | |

Abstract

Blue Badge holders rely heavily on their cars, making them a potential target for Electric Vehicles and Plug-in Hybrid Electric Vehicles (EVs/PHEVs). However, they are a risk averse audience and currently EVs/PHEVs represent a step into the unknown (especially compared to Internal Combustion Engines). Blue badge holders have unanswered questions about EVs and have particular concerns about charging (where to; how to...) The key motivation for considering EVs is financial, but this is rarely compelling for Blue Badge holders who already benefit from financial advantages. Currently there is no clear intuitive link of why EVs would be especially appropriate for Blue Badge holders. Greater exposure to EVs increases propensity to consider them so increasing knowledge about them and promoting test drives is key. TfL can help to inform and develop the EV/PHEV narrative and drive their relevance with a Blue Badge audience.

Key findings

Blue Badge holders heavily rely on access to a car, and this represents freedom and independence. This audience are sensitised to any potential disruption of their experiences. As such, they try to manage any risks as much as possible. When looking at factors that inform their new vehicle choices, Blue Badge drivers have consistent top priorities, namely: reliability, efficiency and cost. This said, this audience feel that (depending on their disability) their choices for vehicles that suit their needs are far narrower. EVs/PHEVs (and other alternative fuel vehicles) are seen as the inevitable future and EVs/PHEVs are associated with being innovative. However, there are also negative associations that persist around these vehicle relating to cost, reliability and prevalence. In contrast Hybrids are considered more established technology and represent less of a risk.

Despite strong associations, exposure to EVs/PHEVs is limited and there is low awareness and poor understanding of them. Greater exposure to EVs can increase drivers' propensity to consider them. Raising awareness to reassure drivers as well as stimulating trial through test drives will be key. Once a clearer understanding of how EVs/PHEVs might meet Blue Badge holders' needs is established they still feel there is no obvious rationale as to why they are relevant to them. There are some links that can be leveraged to make EVs relevant and relatable to this audience but building links between EVs and Blue Badge holders based on their experiences runs risks of causing resentment if they feel they're being defined through their disabilities. It will be crucial that any links made are done so delicately and without causing offense

TfL can help set the conversation and language around EVs and PHEVs by

1. Engaging the Blue Badge audience
2. Helping to demystifying the technology and removing perceptions of 'risk'
3. Informing the development of EV infrastructure
4. Normalising EVs

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