

THE SUSTAINABILITY INDEX

Exclusive EV benchmarking data - Q1 2022

Market-tracking
insights into EV
adoption, charging
and infrastructure



   www.360mediagroupltd.com

The Sustainability Index

Tracking key trends in electric vehicle adoption and charging

The objective of 360 Media Group's Sustainability Index is to track key trends in the electric vehicle marketplace, on a quarterly basis, as the UK progresses towards a ban on the sale of new cars and vans with internal combustion engines from 2030. We have partnered with six companies that capture unique data on the electric vehicle sector, covering demand for new and used vehicles, home and public charging behaviours, and the development of the UK's public charging infrastructure.

Allied to this information will be data from 360 Media Group's own market surveys of fleet decision makers responsible for sourcing and operating company cars and vans. Our Fleet Outlook report measures 40 KPIs via interviews with 200 fleet managers to deliver compelling evidence of businesses' future fleet priorities.

This first report establishes a baseline against which we will be able to monitor the development of the EV market, identifying how demand

for new and used EVs changes, and how well the home and public charging network is keeping pace with the rapid increase in plug-in vehicles on UK roads.

Thank you to our partners: Zap-Map, Mina, Allstar, Cox Automotive, Field Dynamics and Auto Trader, and thank you for your interest in this fast-changing and rapidly-growing sector of the car and light commercial vehicle markets.



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The Tesla Model 3 was the best-selling EV in the UK last year, and with 34,783 registrations was second only to the Vauxhall Corsa in the overall sales charts.



Home charging data

Mina shares key trends in the home charging of company cars and vans



17p/kWh

The average domestic energy tariff paid by fleet EV drivers.

9 hours

The average duration of each home charging event.



6p per mile

The average pence per mile cost (at 3 miles per kWh) for company cars and vans that are 100% home charged.

9p per mile

The estimated pence per mile cost for EVs that use a blend of home and public chargers.



188g/kWh

The average carbon emissions per kWh. The Parliamentary Office of Science & Technology calculates the carbon footprint of off-shore wind energy to be 9 to 13g CO₂eq/kWh, which highlights the carbon savings available from renewable electricity.

60%

The percentage of fleets that report their carbon footprint - and 67% of fleets offset their carbon emissions.





Sustainability Index partner: **Mina**

Ashley Tate
CEO and Co-founder, Mina



Mina is a multi-award-winning tech start-up that provides a payment solution for fleets' electric vehicle charging at home, work and public chargers.

Trusted by some of the UK's largest fleets, the Mina Solution comprises four products; Homecharge™, Chargepass®, Workcharge™ and Carbontrack™.

With Homecharge, Mina integrates with each driver's home charger and energy supplier to calculate the exact cost of charging their company EV at home. It's the only solution that pays for drivers' business miles directly to their energy supplier each month. This means drivers don't have any expenses to claim or receipts to submit and are never out of pocket whilst waiting to be reimbursed by their employer.

The Mina Chargepass gives drivers flexibility to charge in public at over 5,000 charge points with just one single RFID card. Perfect for those who drive long distances and need to charge on the go, and for those who don't have off-street parking.

With Mina Workcharge, drivers can charge their company EVs whilst at the workplace, using their Chargepass to authorise a charge.

“Having a good understanding of business-critical data is an essential part of EV planning, which is why we're pleased to be able to share our charging insights through 360 Media's Sustainability Index.”

Ashley Tate, CEO and Co-founder, Mina

Businesses receive one monthly invoice for all of their fleet's charging activity. Our unique Fleet Portal then shows the fleet insights on charging per vehicle at home, work and public, cost per kWh, consumption and duration, and Carbontrack - our carbon emission and intensity reporting.

With Carbontrack, businesses have the ability to see the carbon footprint of every driver and every charge. This allows businesses to see precise real-time carbon data and equip them with an accurate tool for reporting their carbon emissions.

This makes paying for EV charging transparent, accurate and easy for employers and employees.



Public charging data

Through its Allstar One Electric card, Allstar is capturing data on how fleet drivers use public chargers



1:01

Company EV drivers use public chargers for top ups, with the average charging event lasting just over one hour.

35p/kWh

The average cost per kWh paid by company EV drivers at public charging stations.



12ppm

The estimated pence per mile cost for company cars and vans when recharging at public chargers (based on 3 miles per kWh).

241g/kWh

The average carbon emissions of power drawn from public chargers is higher than from domestic chargers.





Sustainability Index partner: **Allstar Business Solutions**

Tom Rowlands
VP Strategy, Fleetcor



Allstar Business Solutions is one of the UK's leading business and fuel expenses card providers, supporting over 1 million cardholders and over 50,000 businesses.

Our EV charging solutions provide a one-stop-shop for fleets of all sizes, offering fleet managers a holistic view of drivers' charging sessions, on the road, at home and at work, all with consolidated billing, accurate driver reimbursement, and reporting.

Our combined fuel and electric charging card, Allstar One Electric, provides customers with access to over 5,000 charge points across a multi-branded electric charging network when on the road, as well as being accepted at over 90% of fuel sites across the UK, to support mixed fuel fleets.

We have simplified charging on the road even further for our customers with the ability for the Allstar One Electric card to be added as a payment method in the Zap-Map app. This provides Allstar customers with enhanced features to search, plan and pay for charging across the Allstar electric charging network.

Our home charging solution, Allstar Homecharge, powered by Mina, provides

“We're pleased to be able to share our charging insights through 360 Media's Sustainability Index to help fleets make informed decisions about their charging requirements and planning for what lies ahead”

Tom Rowlands, VP Strategy, Fleetcor

accurate payment for the costs of driver's business EV charging at home. With Allstar Homecharge, payments are made directly to the driver's energy supplier, so they don't have any expense claims or receipts to submit and no bill shock for drivers who would otherwise see an inflation in their

energy costs. Our solution is hardware agnostic meaning we can integrate with the majority of smart charge point manufacturers.

Allstar can help support fleets in every step of the EV charging journey. Discover more at www.allstarcad.co.uk



UK public charging infrastructure

Zap-Map's comprehensive overview of public chargers includes their number, type and usage



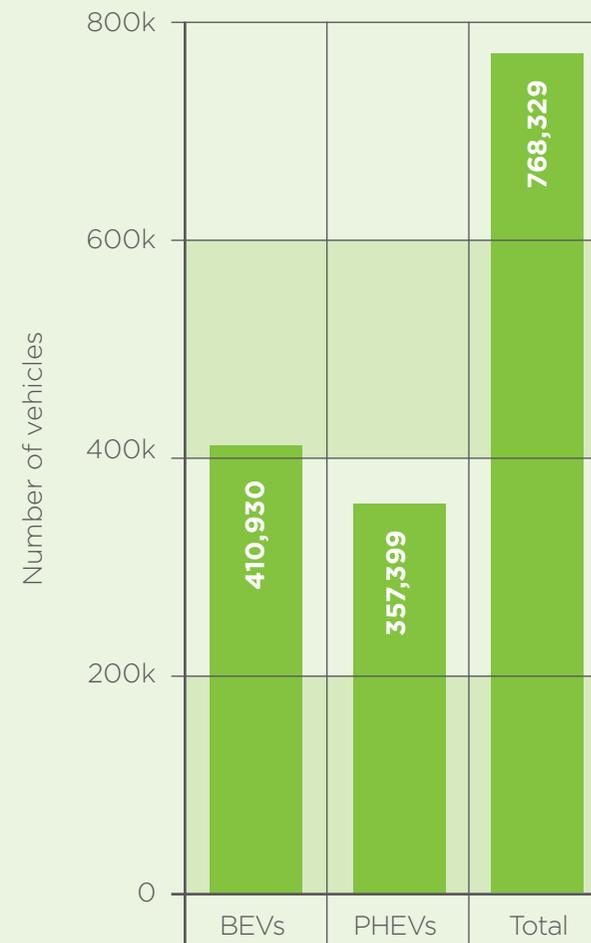
UK charging infrastructure, February 2022

Charge type	Number of chargers	Average charging events per day	Median duration of charge
Slow (3-5kW)	7,559	0.5	5 hours
Fast (7-22kW)	16,658	<1	1.5 hours
Rapid (25-99kW)	4,022	4	40 minutes
Ultra-rapid (100+kW)	1,382	4	40 minutes

UK charging infrastructure, February 2022

Locations	Devices	Connectors
18,573	29,639	49,942

Number of electric cars in UK, January 2022





Sustainability Index partner: **Zap-Map**

Melanie Shufflebotham

Co-founder and COO, Zap-Map



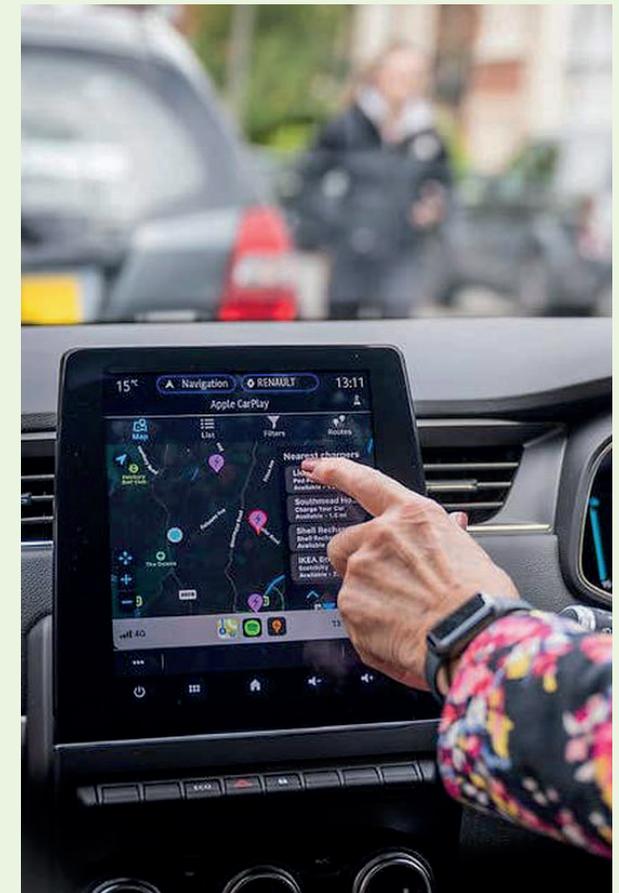
Zap-Map makes electric vehicle (EV) charging simple. It is the UK's leading app and digital platform for EV drivers.

Zap-Map helps drivers to search for charge points, plan longer journeys, pay on participating networks and share updates with other EV drivers. With 95%+ of public charge points mapped and around 70% of charge points showing live availability status, Zap-Map provides EV drivers with peace of mind and the confidence to drive any length of journey in their EV.

With the backing of Good Energy, the leading renewable energy company, Zap-Map's mission is to accelerate the shift to electric vehicles and help the drive towards zero carbon mobility. Zap-Map attracts more than 180,000 UK users per month from a rapidly growing fleet of around 410,000 pure-EVs (Zap-Map's core user group) and 350,000 plug-in hybrids. We are also a go-to data source for the industry, and for current and prospective EV drivers. The engaged Zap-Map community adds daily status and information updates on charging points, and can make their home and work charge points available to other EV drivers as part of the peer-to-peer Zap-Home and Zap-Work network.

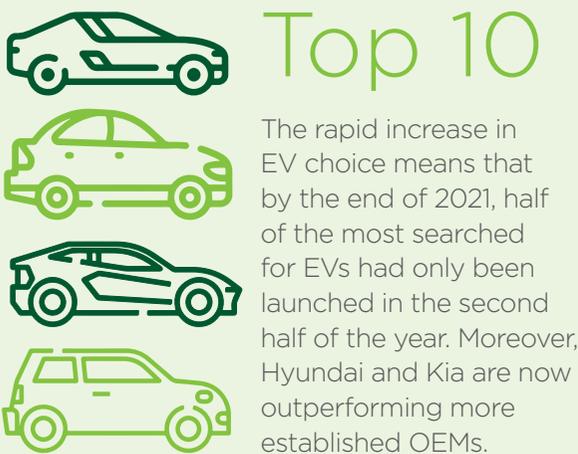
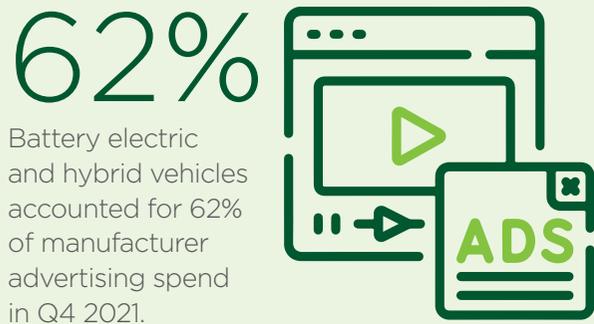
“We are delighted to be part of the Sustainability Index. The public charging infrastructure is growing strongly and as EVs become mainstream, it is essential it keeps pace and continues to develop. Zap-Map will track its growth, utilisation and development and provide up to date information to support both EV drivers and fleet managers.”

Melanie Shufflebotham, Co-founder and COO, Zap-Map

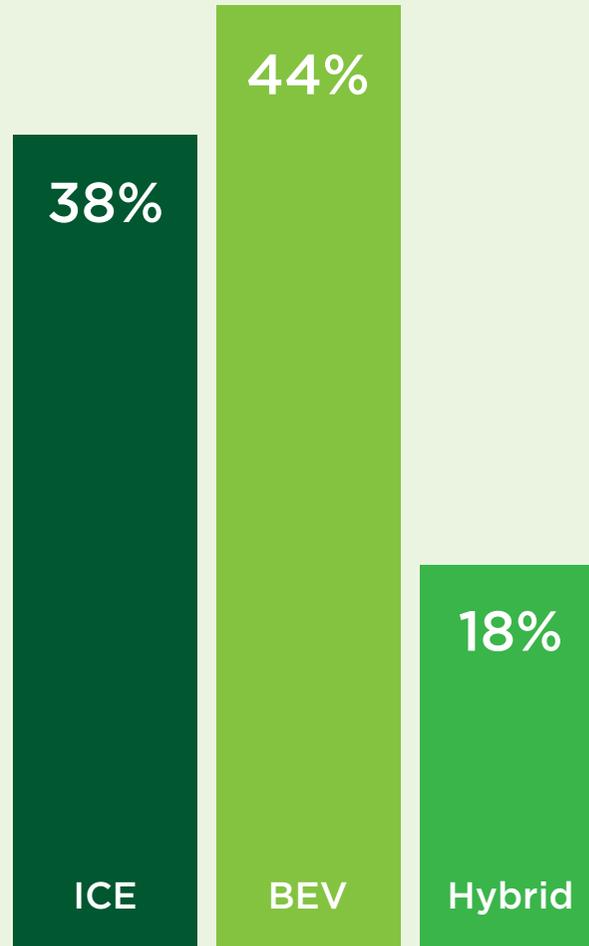


Consumer attitudes towards EVs

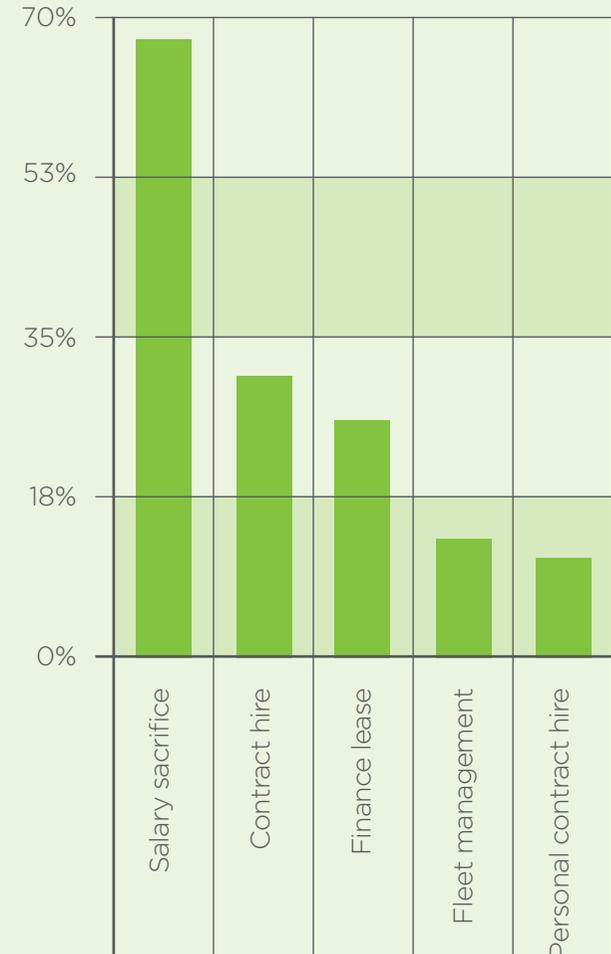
Searches for new vehicles on Auto Trader provide valuable insights into motorists' buying intentions



OEM advertising spend, Q4 2021



EV penetration of fleet funding methods





Sustainability Index partner: **Auto Trader**

Ian Plummer

Commercial Director, Auto Trader



Auto Trader Group plc is the UK and Ireland's largest automotive marketplace, sitting at the heart of the car buying process.

Auto Trader exists to change how the UK shops for cars by providing the best online car buying experience and enabling all retailers to sell online. At the core is building stronger partnerships with our customers and creating an inclusive and diverse culture for all of our people.



“We’re delighted to be a contributor to the Sustainability Index and working in partnership on the Road to 2030.”

Ian Plummer, Commercial Director, Auto Trader

Additionally, using our voice and influence to drive more environmentally friendly vehicle choices is a key focus.

We do this through helping consumers find the right car for them, by matching buyers with retailers and brands promoting greener vehicles, and lastly by using our market-leading insights to help Government, industry and wider stakeholders to accelerate the transition.

Top 10 EV model views (December 2021)



- 1. Kia EV6**
- 2. Ford Mustang Mach-e**
- 3. Hyundai Ioniq 5**
- 4. BMW IX**
- 5. MG ZS**
- 6. BMW i4**
- 7. Skoda Enyaq**
- 8. Mercedes-Benz EQA**
- 9. Fiat 500E**
- 10. MG5**

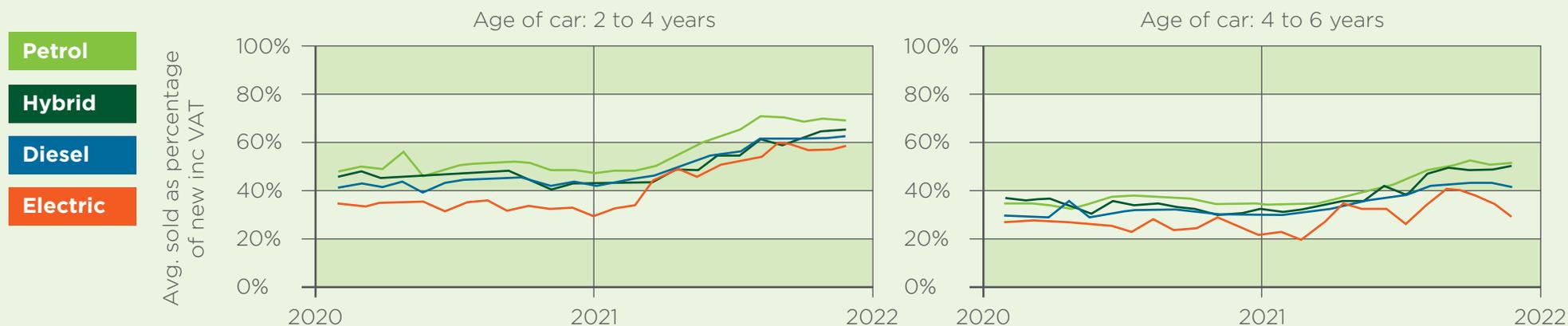
Used EV demand

Cox Automotive has a unique insight into the profile and prices achieved for secondhand electric cars

EV wholesale Top 10, Q4 2021

Top 10	Make	Avg. Age (months)	Avg. Mileage	Avg. Sold Price	Cap Clean %
1	RENAULT	18	8,115	£20,045	101.36%
2	PEUGEOT	18	6,826	£24,826	101.63%
3	NISSAN	43	32,154	£15,672	99.03%
4	TESLA	31	27,951	£45,743	101.61%
5	BMW	32	17,732	£22,278	98.91%
6	VW	32	10,215	£23,014	100.2%
7	DS	21	10,111	£23,700	94.33%
8	HYUNDAI	21	22,106	£23,620	98.99%
9	CITROEN	33	3,808	£21,625	101.05%
10	JAGUAR	31	40,339	£43,250	103.10%

EV residual values as a percentage of cost new





Sustainability Index partner: **Cox Automotive**

Philip Nothard

Insight and Strategy Director, Cox Automotive



Cox Automotive is committed to driving the digital and physical transformation of defleet, remarketing and retail operations for its customers.

As part of Cox Automotive, the world's largest automotive service organisation, we're transforming the way the world buys, sells, owns and uses vehicles. We work in partnership with our manufacturer, fleet and dealer customers throughout the UK and Europe to not just provide dependable solutions that improve performance and profitability throughout the vehicle lifecycle today, but to innovate and prepare for the opportunities of tomorrow.

Our businesses are organised around our customers' core needs across vehicle solutions, remarketing, funding, retail and mobility. Our product brands in Europe include Manheim, Manheim Express, Dealer Auction, RMS Automotive, Movex, NextGear Capital, Modix, Codeweavers, eVA Valuations & Appraisals, Spiers New Technologies, FleetMaster and money4yourmotors.com. Cox Automotive Europe employs more than 2,500 team members and works with thousands of businesses throughout the wholesale and retail automotive markets.

“We are pleased to share our knowledge of electrification and what this means for the vehicle lifecycle ecosystem, through 360 Media's Sustainability Index. As more alternative fuel vehicles enter the retail and wholesale sector, the entire remarketing process will transform to meet new and evolving needs.”

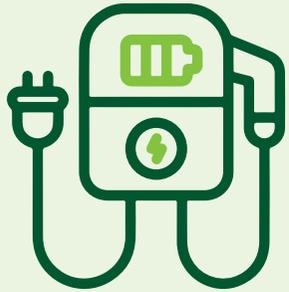
Philip Nothard, Insight and Strategy Director, Cox Automotive

Our recently launched mobility division brings together data, insights, and expertise from around the world to deliver targeted mobility support throughout the US, UK, Continental Europe, Canada and Mexico. The definition of ownership is being redefined, enabled by ever-evolving finance and lease models. Through Cox Automotive Mobility, we are empowering our customers and partners in the UK and Europe to take advantage of the opportunities the mobility landscape has to offer.



EV charging requirements

Modelling by Field Dynamics highlights the different charging infrastructure required by drivers



67%

The percentage of drivers with off-road parking, facilitating the installation of a domestic EV charge point.

<1/week

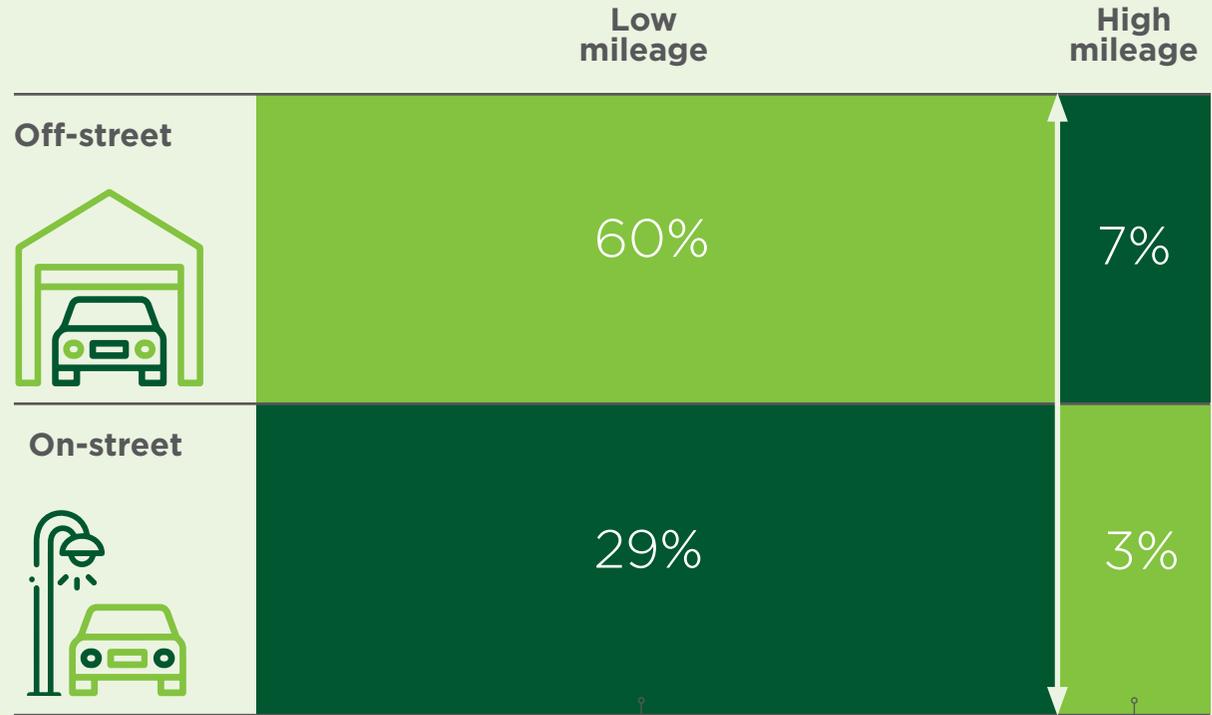
Low mileage drivers (5,200 miles pa) with no off-street charging would only require about 33kWh of electricity per week, which equates to less than one weekly charge.



120kWh

A high mileage driver (18,400 miles pa) would require about 120kWh of electricity per week, equating to three to four charges. About 3% of drivers are high mileage and have no off-street parking, and therefore require a specific recharging solution.

120 kWh



Large numbers of drivers with very flexible charging needs

Small number of very specific drivers needing high volumes of nearby charging



Sustainability Index partner: **Field Dynamics**

Ben Allan

Managing Director, Field Dynamics



Field Dynamics is a leading net zero data analytics consultancy – helping organisations make the most efficient move to net zero.

To us, success is measured by the difference we can make through the carbon reductions we enable our clients to realise.

We perform advanced data science and spatial analysis, as well as creating bespoke

modelling solutions. The analytical outputs from these solutions are used by our clients to make a direct and measurable impact to their businesses.

We're honoured to have had the

opportunity to present this work to some of the largest change management consultancies in the world, and they've been fascinated by the huge difference such a small team can make.

Our projects span both the public and private sector covering a range of clients, include leading management, strategy and transport consultancies, Distributed Network Operators (DNO's), Charge Point Operators, government departments and local authorities.

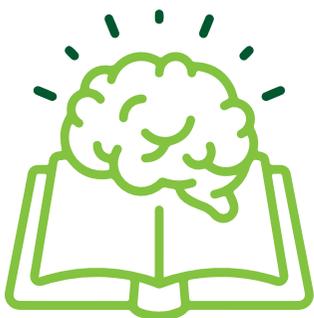
Field Dynamics has a 25-year heritage and pedigree in taking an innovative approach to solving complex operational problems, many of them geospatial in nature.

The pioneering nature of our work has recently been recognised through a shortlisting for a National Award for 'Data Project of the Year' as well as features in GreenFleet, Fleet News and Smart Transport.



Fleet managers are confident in their EV knowledge

It's been a steep learning curve, but decision makers feel they have a solid understanding of EVs

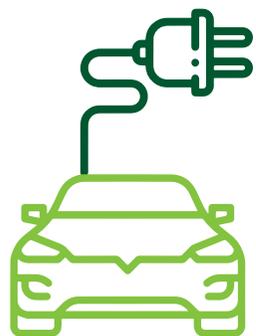
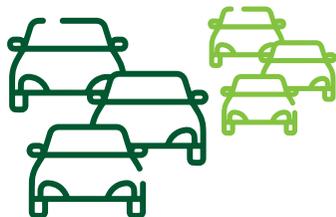


78%

More than three-quarters of fleet decision makers feel confident in their knowledge of electric vehicle models, charging options and general EV management, judging themselves to be at least a level eight (out of 10) in their expertise.

The bigger the better

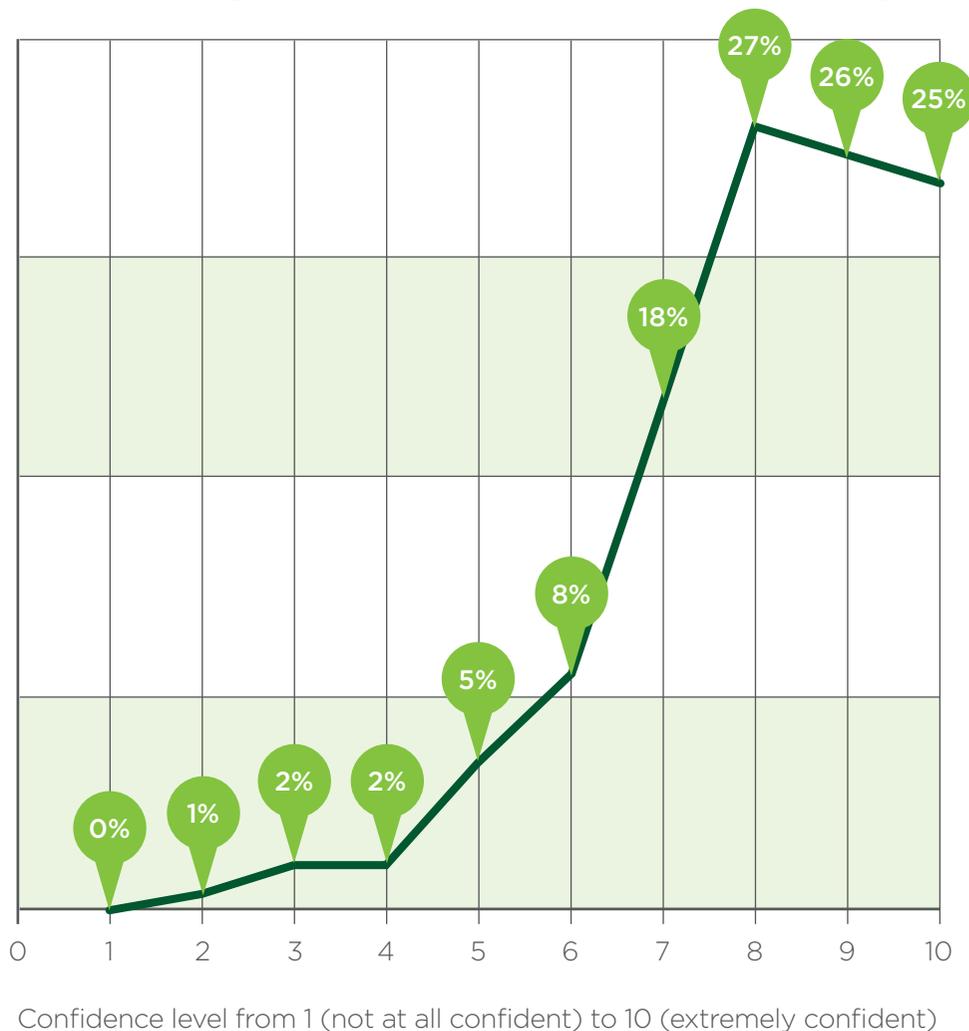
The larger the fleet the greater the fleet decision maker's confidence in EV knowledge, signalling both the lead of bigger businesses towards zero emission motoring and the greater likelihood of a designated executive to manage the fleet.



Cars > vans

Car fleet decision makers are more confident in their EV knowledge than van fleet operators, reflecting the greater operational demands of light commercial vehicle fleets. Fleet managers are expected to play a greater role in overseeing the charging of e-LCVs than electric cars (whose drivers have a substantial BIK windfall to sweeten any inconvenience).

Fleet manager confidence in own EV knowledge



EVs lure employees back into **company cars**

The benefit in kind tax advantages of EVs are bringing cash allowance drivers back into car schemes

Welcome back

59% of fleets have seen drivers return to company car schemes thanks to wider EV choice and the BIK tax savings. This compares to just 13% in 2019.



On the way

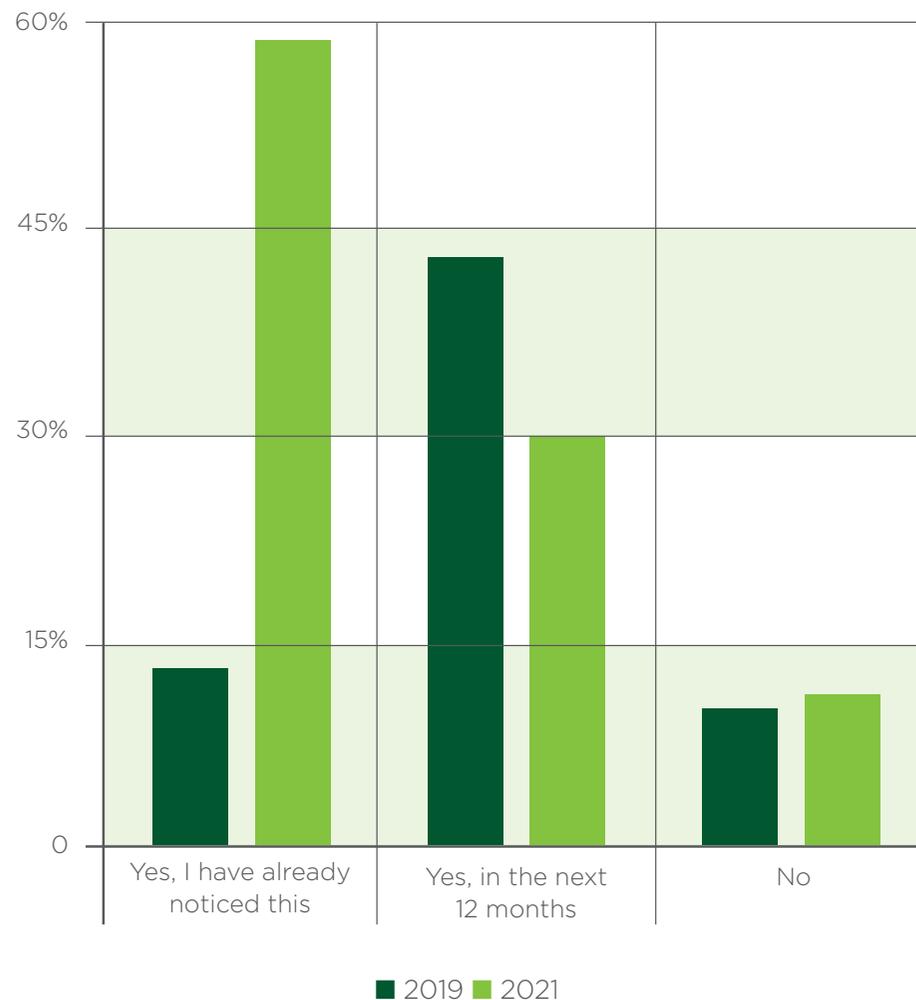
30% of fleets expect more employees to migrate back into their company car schemes this year.

Gone for good

11% of fleet decision think EVs will not bring employees back to company cars, with this percentage rising to 18% in large fleets (100+ cars).



Will EVs bring drivers back into company cars?



10 Barriers to EV uptake

The obstacles to electric vehicle acceptance are changing in priority as a wider choice of vehicles at lower prices becomes available

1

Longer range

Vehicle range is now the primary obstacle to fleets adopting EVs, cited as a barrier by 42% of fleet decision makers.

2

Higher cost

32% of fleets still need convincing that the TCO of EVs is competitive with equivalent ICE vehicles.

3

Driver resistance

More than a quarter (27%) of company car drivers are still resistant to EVs, despite lower BIK bills.

4

Wider choice

26% of fleets still need a wider selection of EVs in all sizes and shapes of car and van.

5

Admin burden

25% of decision makers see EVs requiring more admin for themselves and their drivers.

6

Mileage payments

Managing mileage reimbursements and charging costs is a barrier for 24% of fleet decision makers.

7

Electricity prices

The sharp, recent rise in energy prices is proving an obstacle for 23.5% of fleets.

8

Charging stations

22% of fleets see the lack of charging infrastructure as an obstacle.

9

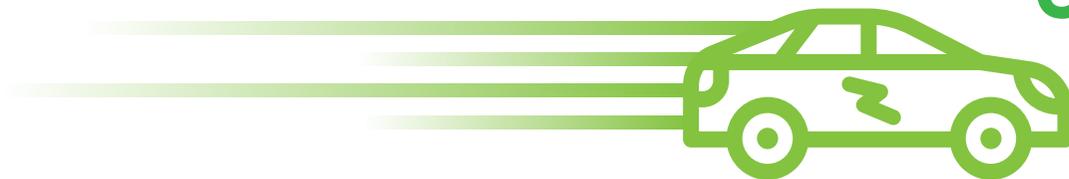
TCO modelling

Uncertainty over EV residual values and SMR costs is a barrier for 13% of fleets.

10

Home charging

Only 8% of fleets now say that their drivers' ability to charge EVs at home is a barrier.





EV information: no dominant supplier

The opportunity to become a trusted source of EV information is wide open

Google search



Fleets are most likely to start their quest for EV information on a search engine, such as Google, or directly on a vehicle manufacturer's website. There appears to be no dominant source of trusted, multi-marque information, presenting an opportunity for vehicle makers as well as leasing and fleet management companies.

Leasing wins

In the 25+ vehicles fleet sector, businesses are more likely to turn to a leasing company for EV information than a manufacturer.



OEMs win

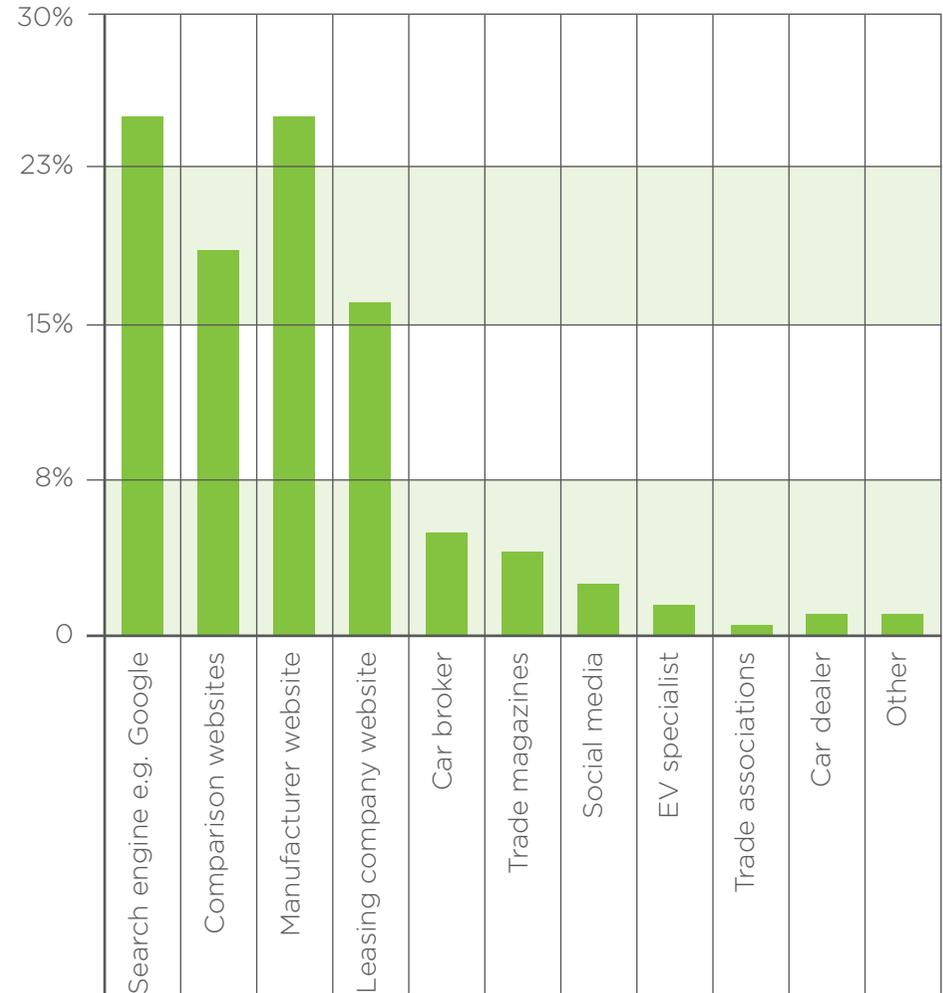
In the sub-25 fleet sector, decision makers are far more likely to refer to manufacturer websites for their EV information than a leasing company site.

100+

Interestingly, in the 100+ vehicles sector, fleets are as likely to use a leasing company website as a manufacturer site for their EV information.

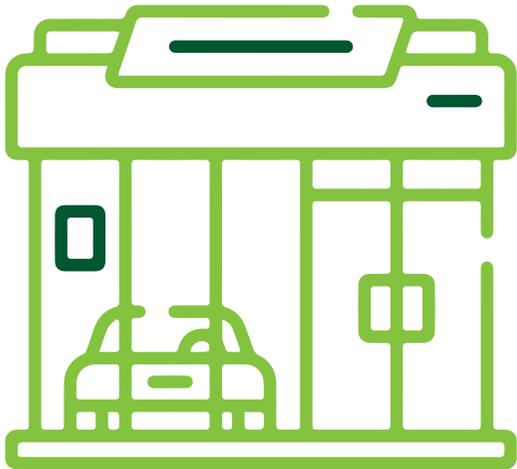


First source of EV information



The end of dealers?

Fleet appetite for vehicle orders direct from manufacturers is undermining the role of dealers



22%

Barely one-in-five fleets considers there is a future role for franchised dealers in new vehicle orders beyond delivery fulfilment. This falls to 9.1% for the largest (100+) car fleets.

56%

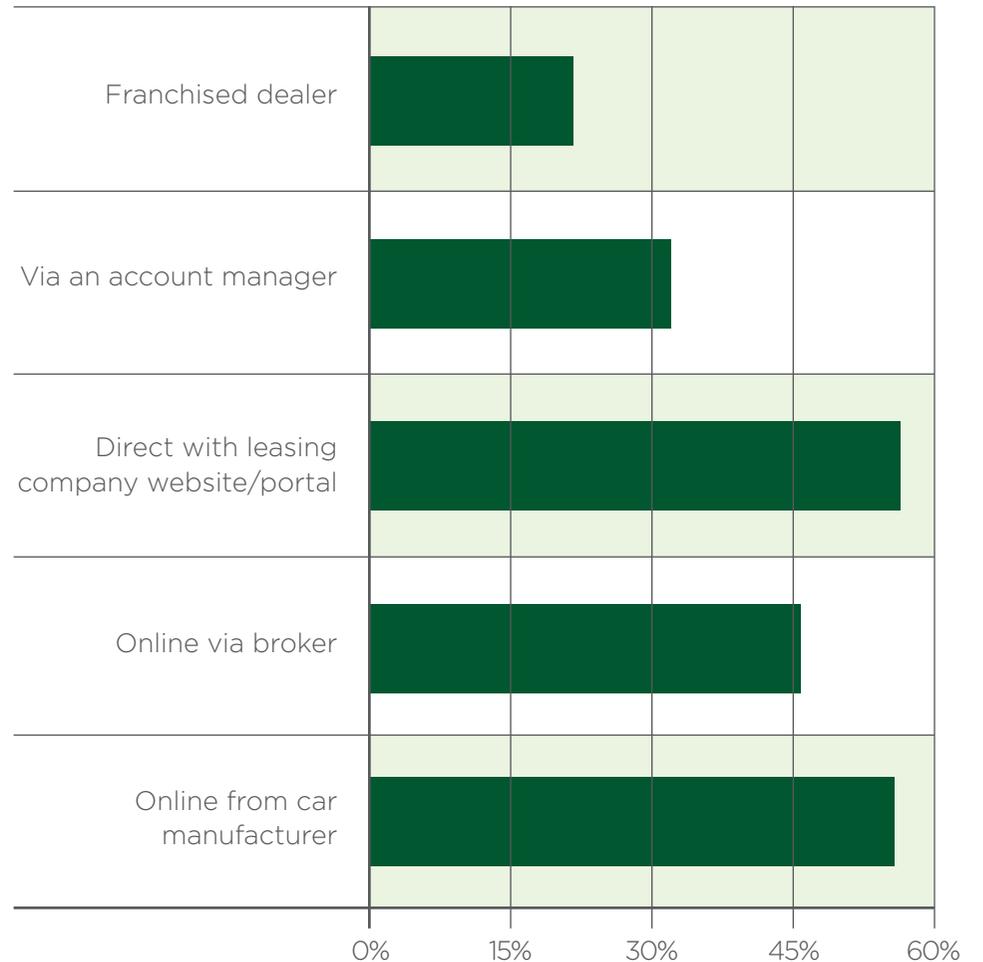
More than half of fleets anticipate ordering their vehicles directly from a manufacturer.



Leaseco vs OEM

The battle to 'own' the customer continues to intensify, with 56.5% of fleets seeing their relationship with their leasing company, rather than dealer or OEM.

Which source for ordering company cars would you consider?



FLEET OUTLOOK REPORT

Incorporating the Fleet 250

NEW!

Explore the future priorities of fleets, based on an in-depth survey of 200+ fleet decision makers.



- Funding decisions
- Fuel strategies
- EV adoption
- Charging infrastructure needs
- Home charging policies
- EV mileage reimbursement

PLUS The Fleet250

A comprehensive listing of the UK's 250 largest car and LCV fleets





Words: Jonathan Manning

Design: www.hilliard.design

Exclusive primary data to benchmark electric vehicle adoption and charging

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