

LowCVP Annual Conference
15 July 2010

Turning London Electric

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Electric Vehicle Delivery Plan

An Electric Vehicle Delivery Plan
for London

May 2009



Infrastructure

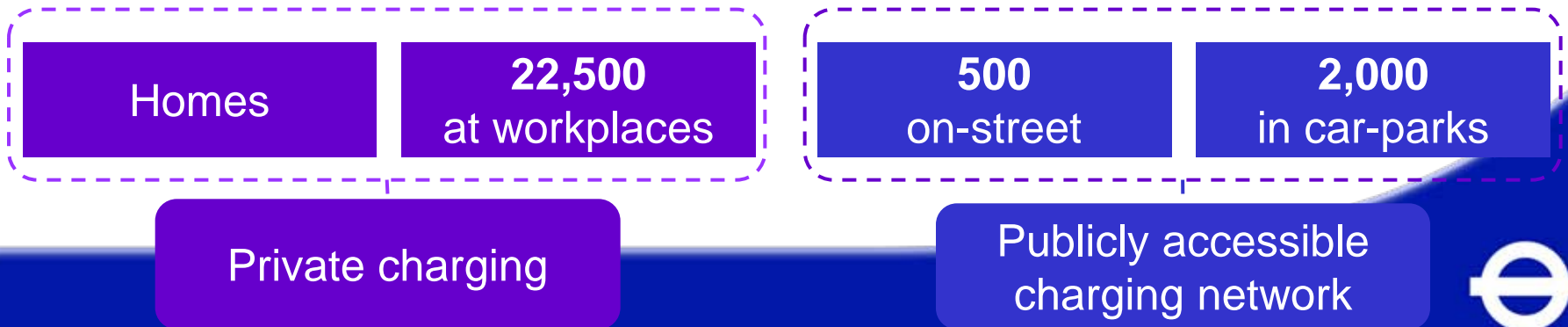
Vehicles

**Incentives, Marketing
and Communications**



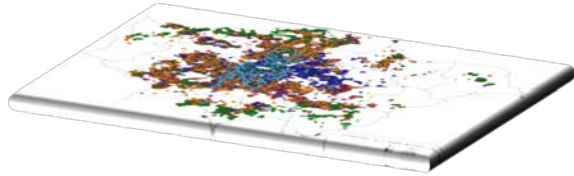
Charging infrastructure

- **25,000** charging points across London by 2015
- **22,500** charging points in workplace car parks
 - ‘Business fund’ to provide financial support to businesses
- Network of **2,500** publicly accessible charging points
 - **2,000** in public car parks
 - **500** on-street
 - Accessible to all registered users - subscription scheme
 - A mix of ‘standard’, ‘fast’ and ‘rapid’ charging points
- All Londoners within **one mile** of a charging point by 2015

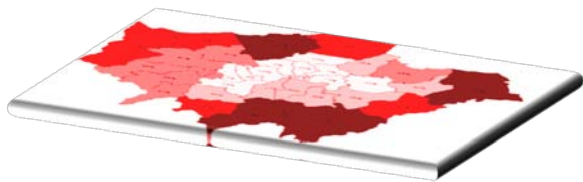


Estimating early adopters in 2015...

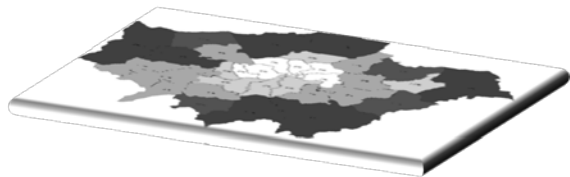
Key consumer segments...



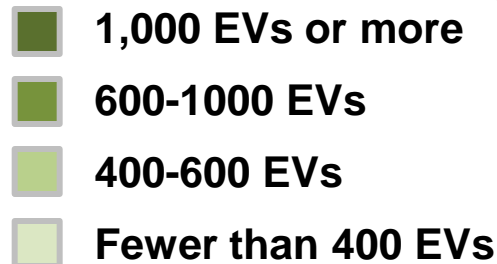
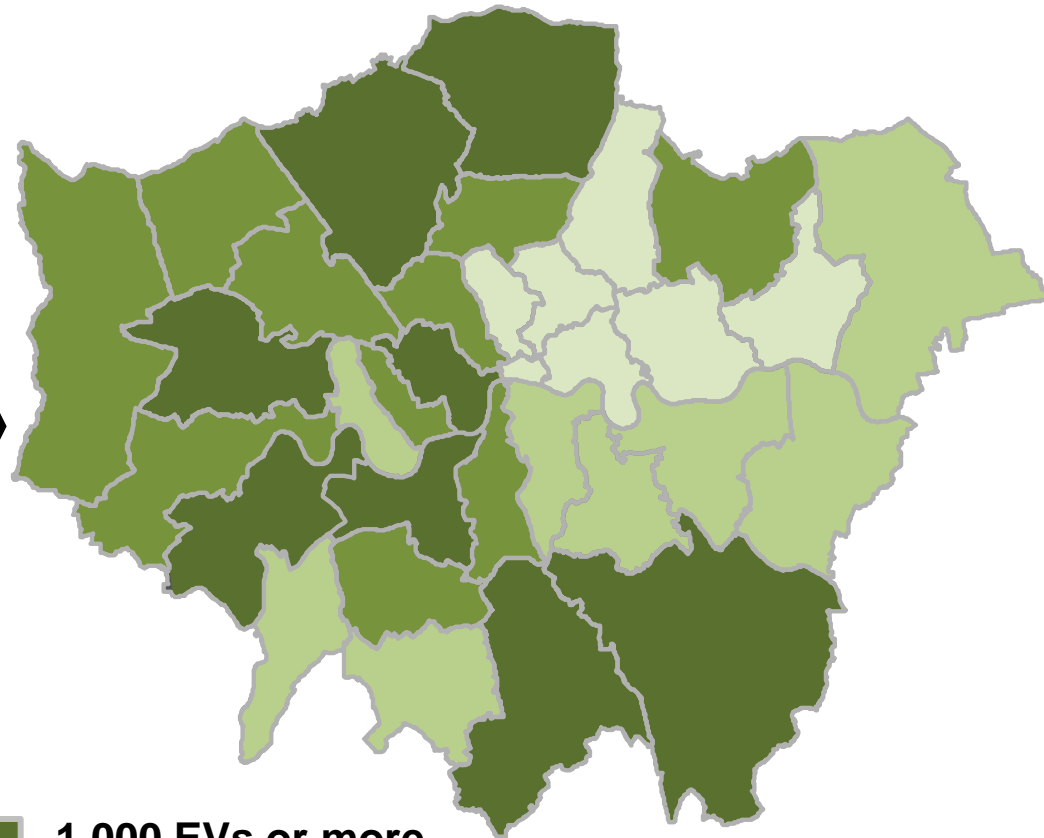
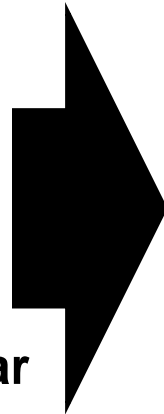
... With off-street parking



... Owning more than one car



... Driving 10-50 miles per day



A number of locations will be targeted



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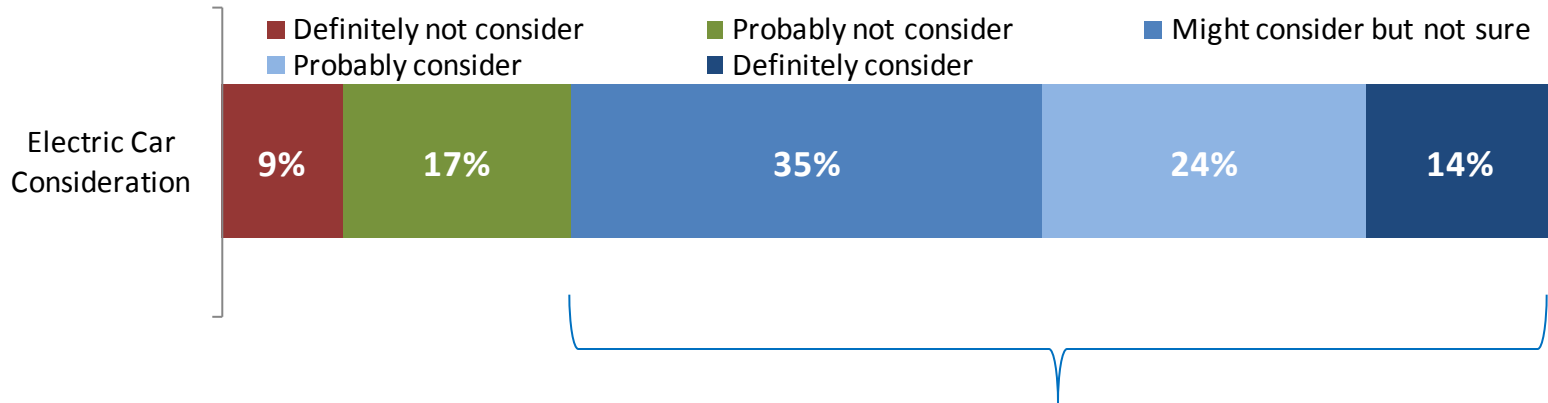
Infrastructure

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High interest in EVs among London drivers



73%
of London drivers would consider an electric car

In the next 12 months	In the next 2 years	In the next 3 years	In the next 4 years	In the next 5 years	In more than 5 years
4%	17%	17%	10%	15%	10%

21% of London drivers would consider an EV in the next 2 years



The electric car market continuum

Current

Near

Far

- High car dependency
- Passionate about cars
- 91% multiple car owners
- New car buyers
- EV as an additional car
- Higher income
- Older
- Early adopters
- Willing to pay a premium
- Fairly environmentally conscious

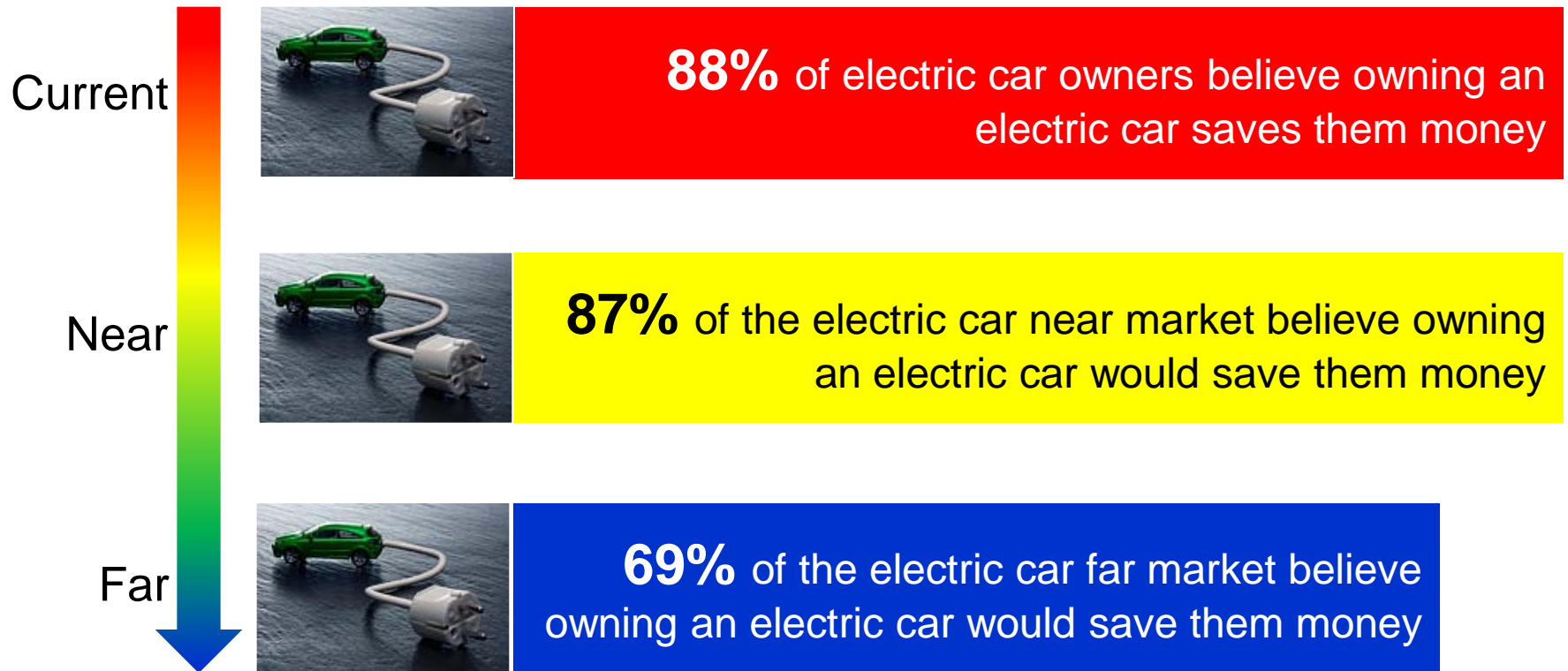
- Average car dependency
- Passionate about cars
- 47% multiple car owners
- Half new car buyers
- EV as a replacement car
- Above average income
- Early adopters
- Trendsetters into fashion
- Very environmentally conscious or claimed green credentials

- Lower car dependency
- Not passionate about cars
- 33% multiple car owners
- Second-hand car buyers
- EV replaces only car
- Lower income
- Younger
- Late adopters
- Wait for price to reduce
- Not especially environmentally conscious



People are motivated by saving money

Very high levels of confidence that electric cars will reduce costs



Day-to-day convenience of electric cars

- The main benefit of electric vehicles for owners is a low-stress car dependent lifestyle day to day
 - Majority of current owners have high disposable income and cost benefits are not just about rational cost saving
 - Owning an electric vehicle takes away many of the stresses of driving in London, e.g. parking meters and fines, congestion charge
- Current owners often incur additional costs (rational and emotional) of owning an electric car:
 - Battery issues and replacements
 - Managing borough interactions – inconsistencies in parking and getting kerbs dropped for charging



Current and near market united by a passion for cars

Current

Near

Far

We have three, one for me, one for my wife and one always plugged in just in case

My car gets photographed more than I do, the attention is brilliant!

It's the next generation in cars

It's the fact that the power is just there with a battery – no delay, put your foot down and off you go!

I went to the Frankfurt motor show, they look incredible



Key differentiators in the market

- Electric car owners are more likely to:
 - Have a higher mean weekly mileage
 - **74 miles** for owners vs **44-50 miles** for potential users
 - Have a higher mean household income
 - **£79k** pa for owners vs **£47-56k** pa for potential users
 - Be based in inner London
 - **54%** for owners vs **28-30%** for potential users



Most electric car owners show commitment to buying electric cars again in future



80% of electric car owners intend to replace their EV with another electric car

"It is just common sense, I drive into London every day, it is worth it."

"I love it, my life is so easy, I'd buy another in a heartbeat."

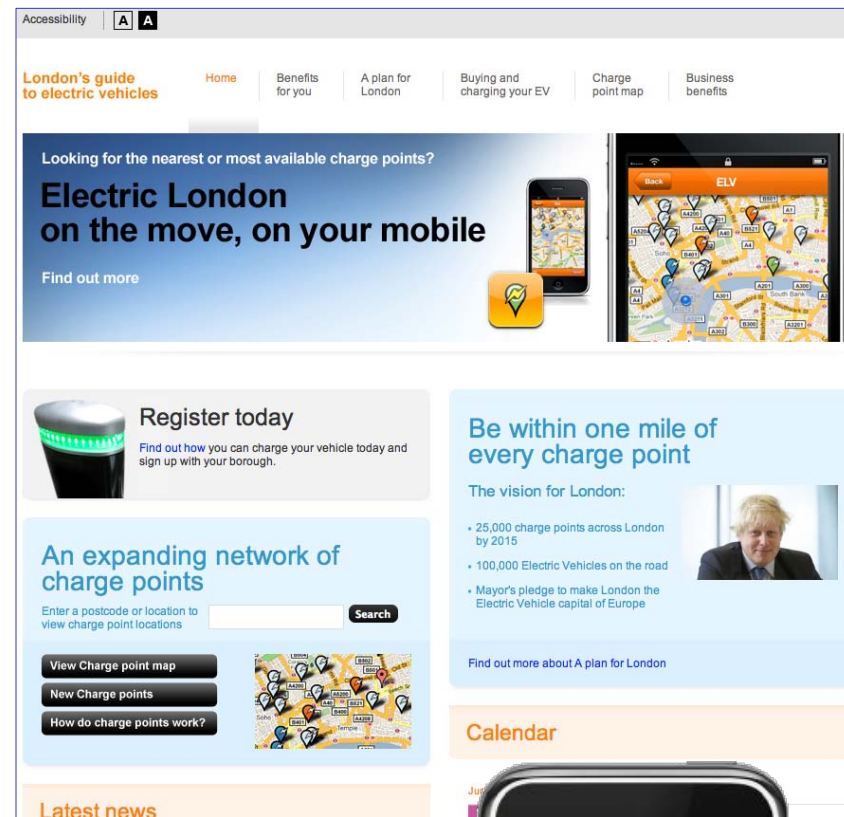
"I am not sure I will, now my daughter is not needing a lift to school. I may just go back to getting the bus"

"I moved into Westminster, there is no parking and the cost of the congestion charge is reduced for residents anyway, so I may go back to a petrol car"



Pan-London scheme and website

- A new brand for charging
- One scheme
 - Annual membership fee
 - Access to the 2,500 public charging points with electricity free at the point of use
 - A call centre for help and advice
- One website
 - Location and availability
 - Case studies - including 'The Mayor's Electric 10'
 - Key facts and consumer information
 - Myth-busting
 - Home vehicle charging advice



In summary - Electric Vehicle Delivery Plan

- 100,000 electric vehicles as soon as possible
- 1,000 electric vehicles in the London government fleet by 2015
- Support adoption by councils, businesses, car clubs and Londoners
- Target of 25,000 charging points by 2015
 - Majority in workplaces, but 2,500 in car parks and on-street
 - 20% of car parking spaces in new developments must be equipped with charging facilities
- Commitment to maintain Congestion Charge exemption
- Aim to harmonise parking and other incentives across London
- Single brand and communications strategy to support uptake



Political commitment is critical



London to be the 'greenest city'



THE INDEPENDENT

Mayor unveils plan to turn London into 'electric car capital of Europe'

