Motivations, barriers and opportunities
for wider take up of (Ultra) Low Emission Vehicles (ULEVs)

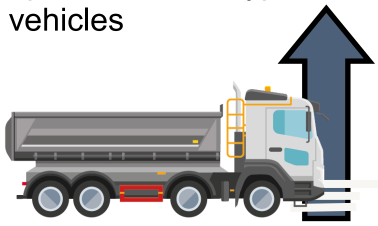
LoCITY

The aim

Databuild and LowCVP were commissioned by TfL to undertake market research to better understand:

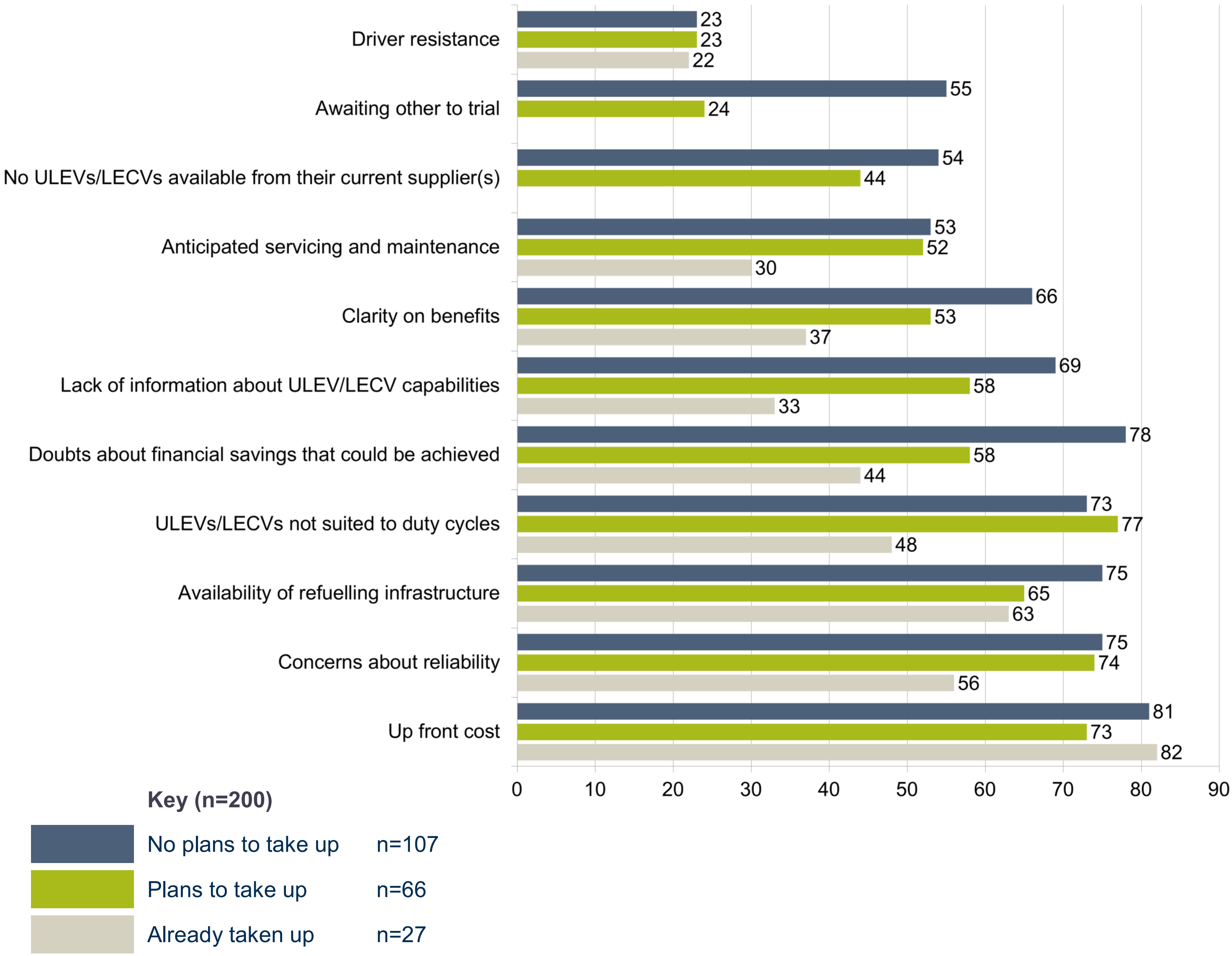
1 Operator knowledge and awareness of viable alternative fuels for operational HGVs and vans for business purposes

2 How to influence and subsequently increase uptake of these types of vehicles



Barriers to take up

Operators were prompted with a list of possible barriers to take up of ULEVs in the future (%)



Opportunities for LoCITY

1	2	3	4	5
Clarity on the definition of ULEV and options (makes and models)	Provision of more information on the ULEZ boundary and changes	Display of the current and planned extent and location of publicly accessible infrastructure	Signposting sources of funding for ULEV trials or take ups	Partnering with fleet audit providers

We spoke to

200 **Commercial vehicle operators**
to explore their fleet profile, duty cycles, current ULEV take up and specific drivers and barriers to future take up

30 **Operators**
completed follow up in-depth interviews focusing on their vehicle purchasing process and practices

10 **Key influencers**
who provided an overarching perspective on drivers and barriers to take up

Segmentation was split into groups

Positive (26%) These operators are already engaged and/or enthusiastic

Neutral (34%) These operators are yet to purchase, have little knowledge and have less enthusiasm

Negative (40%) These operators have reservations and/or low propensity to take up