EVA England

PUTTING THE DRIVER FIRST

Building an EV transition that works for everyone

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June 2026

Acknowledgments

Thanks to Nicholas Hall and Florence Lee from Tendo Consulting for their research support and insights, and to our members for their input into our workshops and surveys.

About Electric Vehicle Association England

As a members' association, EVA England is the only organisation in the country solely dedicated to current and future electric vehicle (EV) drivers' interests, independently of the EV manufacturing and charging sectors.

We focus our data gathering and policy formulation on driver perceptions: the appetite for EVs across the driving community; how current EV drivers are responding to improvements in charging and fluctuations in purchasing and charging costs; and where barriers remain, dissuading more drivers from switching to electric.

We regularly run driver surveys and member workshops to gather feedback on what aspects of the transition work well for consumers and where improvements still need to be made.

With special thanks to our supporters:

Autotrader evci zapmap

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FOREWORD

The electric vehicle (EV) transition is gathering remarkable pace. There are now over 2 million EVs across the UK. Dealerships are reporting overwhelming demand in their showrooms for electric cars, and platforms such as Autotrader say that EVs are around 30% of buyer enquiries[1]. Full battery EVs accounted for 26% of new car sales in April, a growth of 59% compared to last year[2]. And over 120,000 public chargepoints have been rolled out across more than 46,000 locations – five times as many locations as petrol stations[3].

This rising interest in EVs has occurred despite consumers getting mixed signals from political parties here in the UK, within Europe, and beyond, with recent ongoing calls to weaken EV targets and the continued freeze on fuel duty. The past few months have shown just how resilient EVs are in the face of global market shocks like rising oil prices, and more and more households are looking seriously at switching to electric for their next car purchase.

These households, these drivers, are at the heart of the transition to EVs. As drivers, we are not being mandated to buy electric – we must choose to do so. Two million EVs on UK roads is an incredible milestone, but it represents only around 5.5% of the total UK car parc, and that, coupled with our continued conversations with drivers, shows that now is not the time for complacency.

There is still considerable scepticism surrounding electric cars, and a long way to go until they are an attractive option for the mass driver market. 39% of petrol and diesel drivers say they are not yet willing to go

1 Autotrader, *Monthly Market Intelligence Report*, 2026
2 Society of Motor Manufacturers and Traders (SMMT), *UK New Car Registration Data*, 2026
3 Zapmap, *How Many EV Charging Points Are There in the UK?*, 2026

electric[4]. We are still having to reassure and persuade drivers about the vehicle's range when, for the millions of EV drivers out there, range anxiety is truly a thing of the past. We are still talking about EVs being more expensive to buy than petrol and diesel cars when, for the last few months, EVs have, on average, been the cheaper choice. We must stop contributing to the confusing narrative around EVs playing out in the media and make more effort across industry, and within Government and Parliament, to reassure households that going electric can work for them, and make their lives easier, cleaner and more affordable.

But that doesn't mean that some of these driver concerns are unfounded. When we talk to EV drivers and those who want to make the switch, there are still real challenges to tackle. If we do not take action now, we will continue to head towards a two-tier transition where electric works only for those who 'have', and does not work for those who 'have not'.

EVs are still unaffordable for the 50% of households on lower and middle incomes[5]. The high costs of public charging mean that for those households without a driveway, the costs of running an EV can be substantially more expensive than running their current petrol or diesel car. Too many drivers are still experiencing frustration with a public charging network that is nowhere near as seamless and easy as it should be. And discussion about a proposed pay per mile tax for EV drivers threatens to exacerbate these issues and put the brakes on for many who were contemplating making the switch.

It is right that Government's focus to date has been on the Zero Emission Vehicle mandate and that its policies are targeted at achieving that mandate. The ZEV mandate targets have been absolutely vital to creating an EV market, pushing the auto sector to manufacture and sell products that we as drivers want to buy, and promoting investment in a nationwide charging infrastructure.

But we cannot continue to just chase headline targets and chargepoint numbers. For the ZEV mandate to be achievable and stable, and for the longer-term EV transition to last well beyond the final date of the mandate, we need to create a firmer foundation for success by ensuring that EVs can work for everyone, whatever their circumstance.

Many Government actions to date have provided an important platform from which we can build: the Electric Car Grant, Local EV Infrastructure Fund, workplace charging scheme, new cross-pavement fund, and changes to planning rules so it is easier to install chargepoints and cross-pavement solutions, to name a few. But stronger and bolder action is going to be needed to create an EV sector that is attractive and accessible to all households.

This white paper sets out a framework for how Government, industry and consumer groups can collectively achieve that.

Dr Victoria Edmonds
CEO, EVA England

4 EVA England, *Steer the Conversation*, 2025
5 EVA England and Transport & Environment, *Access to Lower Cost Electric Cars and Vans*, 2026

"As a member of the Transport Select Committee, I am delighted to welcome EVA England's white paper, Putting the Driver First. Its central message is one that should resonate across Parliament: the transition to electric vehicles will only succeed if it works in the real lives of drivers, families and communities across the country.

"The question is no longer whether electric vehicles have a vital role to play in cutting transport emissions. They do. The question now is whether we can make that transition fair, trusted and practical for every driver, not just those with a driveway, a new car budget, or easy access to reliable charging.

"That means listening carefully to the people making the switch, and to those who still face barriers. It means supporting the growth of a healthy second-hand EV market, ensuring public charging is affordable and dependable, giving confidence to motorists who are still unsure, and designing policy in a way that helps rather than holds back the drivers we need to bring with us.

"This is exactly the kind of constructive, evidence-led contribution that is needed. Government, Parliament, industry and consumer groups all have a role to play in ensuring EVs are not only a workable answer to our decarbonisation needs, but a viable and attractive choice for residents in every part of the UK.

"As Parliament continues to scrutinise the future of transport policy, I hope colleagues and stakeholders across the sector will engage seriously with the ideas set out here, and work together to keep the driver at the heart of the road to net zero."

Dr Scott Arthur MP
Labour MP for Edinburgh South West, and Member of the Transport Select Committee

PUTTING THE DRIVER FIRST
KEY ASKS

1. GENERATE WIDESPREAD ACCESS TO AND TRUST IN THE CARS

Re-target government incentives to where they are most needed:

- Put the additional £1.3bn of Electric Car Grant funding announced at Budget 2025 towards a UK social leasing scheme that subsidises lower cost, longer term leasing packages for those drivers on lower and middle incomes.
- Extend favourable benefit-in-kind rates for full battery electric vehicles until at least 2035, the end of the transition period.

Increase consumer confidence in the used EV market:

- Incentivise salary sacrifice schemes to extend their packages to the used EV market.
- Accelerate the introduction of a UK battery health standard that provides drivers with consistent advice on battery performance.
- Develop a clear communications strategy that informs drivers how to interpret that standard in the context of the vehicle's range, and where to turn to for support and advice on battery health.

Promote approved industry training programmes across franchised and independent dealerships, service and repair providers, leading to a better experience and better information for prospective EV drivers at the point of sale and on service.

2. DELIVER A PLAN FOR SUPPORTING HOUSEHOLDS WITHOUT ACCESS TO PRIVATE CHARGING

Ensure the Government's Cost of Public Charging review delivers quick and tangible outcomes that bring prices down for drivers at the chargepoint:

- Deliver structural reform to bring down energy costs for chargepoint operators (CPOs). This must be about bringing down standing charges, removing policy levies and incentivising dynamic pricing, as well as VAT equalisation.

Accelerate the rollout of alternative, affordable charging solutions:

- Use the Government's Local EV Infrastructure funding contracts to require local authorities to put in place models that incentivise reduced pricing and to require priority consideration of the viability of cross-pavement solutions in their area.
- Support grid connections for multi-unit dwellings that bring down the costs of installation for landlords and residents.
- Provide seed funding to look at the potential for charger sharing platforms, and whether and how to create a sufficient market for these in the UK.
- Build on the success of the school's workplace charging fund to support the rollout of chargepoints across other public sector sites, including NHS sites and state-funded leisure centres.

Get the underlying regulatory regime right:

- Give renters and leaseholders the right to request chargepoints.
- Publish the updated PAS 1899 standard urgently, so that chargepoints going in the ground now can cater for drivers with disabilities.
- Review the AEV Act 2018 and subsequent Public Chargepoint Regulations so that they address evolving consumer needs and are fit for purpose for the chargepoint market of the future.
- Create a fully resourced, independent regulator for the chargepoint sector that delivers a transparent monitoring and enforcement regime, and provides an independent customer complaints and resolution service for both public and private chargepoints.

3. DELAY AND RE-DESIGN THE PROPOSED PAY PER MILE SCHEME (EVED)

Delay the proposed pay per mile scheme until at least 2030 and make sure that it works for drivers from day one:

- Move away from upfront estimated payments, towards a system based on actual usage.
- Introduce a clear, universal, rapid refund mechanism for overpayment, and adequate protections for drivers from third-party costs and surcharges.

Pillar 1

GENERATE WIDESPREAD ACCESS TO AND TRUST IN THE CARS

Electric vehicles are increasingly being seen as an established and trusted technology. Our annual surveys of thousands of drivers show incredibly high rates of EV driver satisfaction with their cars.

95% of EV drivers say they would recommend these cars to friends and family, and more than 9 in 10 say their EV is cheaper to run than their previous petrol or diesel car. Indeed, around 60% of petrol and diesel drivers – even before the current increase in oil prices – said they are considering switching to electric; and 62% of those driving hybrid vehicles said their next vehicle purchase will be fully electric. For the second month in a row, the average transaction price of a new EV is lower than for petrol and diesel cars[6], chipping away at one of the biggest barriers to those looking to switch to electric, the upfront cost.

But these numbers mask a more uneven reality.

At present, EV uptake is concentrated among higher-income households. Our surveys also show that over 90% of current EV drivers have access to off-street parking, and only 28% of EV drivers have household incomes below £50,000.

At the same time, around 80% of drivers buy on the second-hand market, yet less than a quarter of EV purchases are used vehicles. And 46% of petrol and diesel drivers continue to cite upfront cost as a key barrier[7].

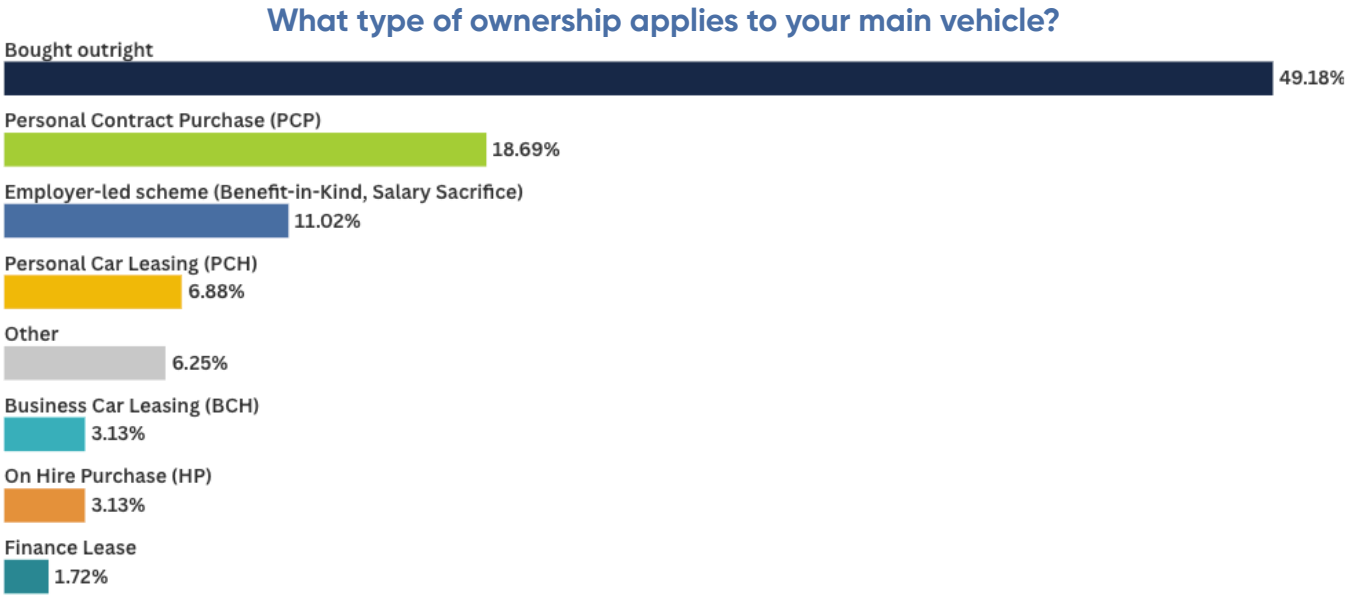
EVs, both new and used, remain out of reach and unattractive to many households and unless real effort is made to tackle this ongoing, widening structural divide, they will not become the mass market consumer vehicle of choice, and could contribute to a widening social equity divide between those who have the income and access to private charging to allow them to take advantage of the resilience and cheaper running costs of EVs, and those who cannot.

> *"I love my EV, but when this PCP ends I will give it back and try to live without a car. It's just too expensive to own."*
>
> *"The high price of the EV is off putting. I can only afford it as it's available on salary sacrifice scheme.*
>
> *"The high cost of ownership. I have never spent more than £10k on a car in my life and the cost of change is shocking to us."*

6 Autotrader, *New EVs Are Now Cheaper Than Petrol Cars on Average*, 2026
7 EVA England, *Steer the Conversation*, 2025

THE POTENTIAL FOR SOCIAL LEASING

Leasing is fast becoming the preferred purchase method for many drivers switching to electric. The UK leasing market has grown by around 13% in the last year, and 47% of BVRLA fleet leases are now for full battery electric vehicles[8]. Of the drivers we regularly survey, around 45% are entering the EV market through personal or business leasing or financing agreements.



Favourable benefit-in-kind rates, and salary sacrifice schemes across both the new and used market are therefore absolutely vital to maintaining the pace of the transition, and must be extended to at least 2035 to ensure its sustainability.

Our work with Transport & Environment, on how to support more households in accessing EVs, also makes clear that for the 50% of households on lower and middle incomes, there is a monthly affordability mismatch. These households typically spend £50–£100 per month on motoring, while even the cheapest EV leasing options are around £141 per month, well above what many can afford[9].

Existing support mechanisms are not reaching these drivers. The Electric Car Grant is aimed at those who can already afford to buy new, and salary sacrifice schemes are often inaccessible. The average UK salary for a salary sacrifice scheme is £42,691, and they are targeted at salaried employees (rather than those paid hourly, self-employed or on zero hours contracts), limiting eligibility for many.

Multiple barriers start to reinforce each other for these households: the upfront costs of purchasing or leasing electric vehicles; a limited understanding of the vehicles and their potential to reduce households' running costs; and a lack of access to affordable charging.

8 BVRLA, *Leasing Outlook Report*, 2026
9 EVA England and Transport & Environment, *Access to Lower Cost Electric Cars and Vans*, 2026

French social leasing scheme

The French Government launched a highly targeted social leasing scheme that became operational in January 2024 and oversubscribed in its opening six weeks.

Only households earning under €16,000 per year and with a commute of more than 15km were eligible, and a total of 50,000 applicants were approved for Government-backed leasing contracts of between €100–€150.

The scheme was renewed for 2025. It has the added benefit of promoting local EV manufacturing, as the scheme's design pushes eligible applicants towards European models.

The success of the French scheme shows that when the price is right, drivers can and will switch to electric. Re-targeting the Government's existing Electric Car Grant to build a similar UK scheme has the potential to unlock 950,000 more EV sales by 2035, and ensures that those on lower and middle incomes have just as much chance to access the benefits of electric cars as those on higher incomes[10].

We therefore urge the Government to:

- **Introduce targeted social leasing: use the Electric Car Grant fund for a subsidised leasing scheme designed specifically for lower and middle-income households, using existing frameworks such as Universal Credit or the key workers scheme to target eligible households. A subsidy of £100 per month would bring EVs within reach of the bottom 50% of households.**

- **Incentivise all-in-one leasing bundles that include insurance, maintenance and charging credits, and so simplify the whole process of the transition to electric for households, whilst also reducing overall running costs for those without access to home charging.**

10 EVA England and Transport & Environment, *Access to Lower Cost Electric Cars and Vans*, 2026

THE POTENTIAL OF THE USED EV MARKET

There is a marked difference between the attractiveness of the wider used car market and that of the used EV market. Around 75-80% of all car sales are second-hand, but less than a quarter of those purchasing EVs are buying used[11]. Prices on the used EV market are also much more volatile, with ongoing fluctuations that can reduce or increase the residual values of new cars, which in turn affect the attractiveness of the vehicles to consumers and drive up the price of a lease.

Some of this is due to the maturity of the second-hand EV market, and as more and more EV products hit the used car market, and the proportion of EVs grows, this volatility should stabilise and prices should come down.

And that used EV market is growing. Data from Autotrader shows that used EV transactions on its platform rose 3% year on year in April[12], and SMMT data suggests that sales of used full battery EVs grew by 32% to around one in 23 buyers (compared to one in 30 last year)[13]. One in four used EVs are now under £15,000.

However, extension of lower cost, longer term leases across to the used EV market would go some way to ensuring its stability and affordability both for the company car and leasing schemes largely suppling this market, and for the customer. **Whilst some schemes, such as Octopus EV, do offer salary sacrifice schemes on used EVs, many do not, and the Government should consider how to incentivise more companies to extend their schemes to this market.**

A large part of the value of a used EV to a prospective customer is the life of its battery. Our surveys show that drivers are still sceptical that the battery will last its advertised range. Whilst data suggests that EV batteries depreciate on average only 2% per year and are expected to last as long as the life of a petrol or diesel car, there are cases where drivers have found their battery degrades (or the performance of their car deteriorates) much faster than expected.

> *"[...] can't afford at the moment to save up for an EV and there have been lots of reports of faulty batteries when you buy EVs second hand. Would rather save up for a few years and buy a new EV."*
>
> *"Not enough data yet about battery lifespan and depreciation in value, if you keep the car long term the battery replacement would be greater than the value of the car."*

This matters. Drivers deserve to understand that the product they are buying will perform as it is supposed to. The battery is the vehicle – it determines its performance, and insurance and maintenance costs. **It therefore makes absolute sense that it should form an integral part of an electric car's health check.**

11 EVA England, *Steer the Conversation*, 2025
12 Autotrader, *Monthly Market Intelligence Report*, 2026
13 Society of Motor Manufacturers and Traders (SMMT), *UK Used Car Sales Data*, 2026

Marc Palmer
Head of Insights at Autotrader, the UK's largest automotive marketplace

"As petrol prices continue to stay sky high, we're seeing a clear trend: car buyers are making the switch to low-emission vehicles. The data from our platform shows consumers are actively seeking out greener, smarter options - the remarkable pace at which electrified models are selling underscores the growing desire for cars that blend affordability with lower running costs.

"However, our research shows that concerns around battery health are still a top barrier to electric consideration, and it's vital consumers can have confidence in the information they're given. Whilst the Government consultation on Updating the minimum emission standard for new road vehicles is a good start, EVA England is right to call for further support in providing consumers with confidence in their electric vehicle batteries.

"Current market dynamics are positive but there's no guarantee they're here to stay and relying on soaring petrol prices for a healthy used electric market isn't a robust approach – we must take proactive steps in ensuring an equitable and accessible transition, for which the used electric market is essential."

There are a number of battery testing products on the market that consumers can use, but these products are unregulated, working to different standards and can give wildly different battery health results for the same car.

The UK urgently needs a battery health standard that can form the basis for formal testing and certification of an EV battery's life.

> *"All used evs need a mandatory independent battery health report to improve confidence in the used EV market, not difficult."*

We therefore welcome the Government's current consultation on introducing an automatic battery health standard and check through the vehicle's life for new EVs, as part of its work on **updating the minimum emission standard for new road vehicles[14].**

But the Government and industry must also consider how to communicate what that standard means to customers, including its relationship between battery health and range, and when and how to seek help or further battery health checks and advice if they have concerns.

The Government must also be clear how the standard will apply to existing battery health testing products on the market.

14 UK Government, *Updating the Minimum Emission Standard for New Road Vehicles*, 2026

THE ROLE OF THE FRONTLINE: DEALERSHIPS & SERVICE CENTRES

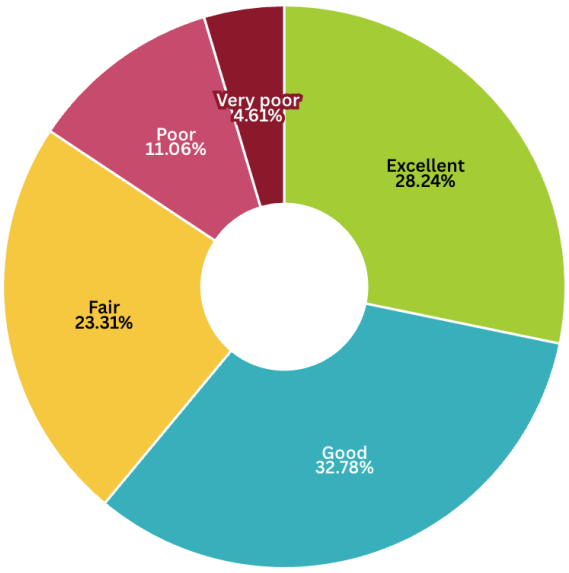
59% of EV drivers still believe misinformation is playing a prominent role in holding back the transition, with point-of-sale information at the dealership level being pulled out as inadequate and a substantial concern[15].

This misinformation is almost certainly driving the prevailing concerns and psychological barriers seen by non-EV drivers, who often focus on range anxiety, lack of charging infrastructure and usability of that infrastructure as their main reasons for not choosing electric. These are not the prevailing concerns of those who drive electric. EV drivers worry about charging tariffs – both at home and at public chargepoints - and about ease of access to chargepoints.

There is a clear gap between the lived experiences of those driving electric, and the perceived barriers of those who do not. Whilst many organisations are starting to focus on how to tackle that misinformation at a national, media level, we do not yet have a good cross-sectoral solution or strategy for grappling with the ongoing lack of knowledge at the dealership level or in service and repair centres.

Our EVA England surveys show that while 61% of EV drivers rated their handover or service centre experience as good or excellent, nearly one in four (23%) described it as fair, and 16% as poor or very poor. Satisfaction levels are notably lower among second-hand buyers. Many drivers commented that staff lacked sufficient knowledge about EVs, charging systems, and battery technology - all recurring concerns that have yet to be fully addressed.

How would you rate the handover experience and/or the advice you received when you got your vehicle?



"Disinformation is rampant. I would have struggled or been disappointed if I didn't know much about EVs beforehand."

"The salesperson had no knowledge of EV chargers or battery types."

15 EVA England, *Steer the Conversation*, 2025

There are clear examples of good practice, particularly amongst EV-specialist or manufacturer-led dealerships, that provide a platform for demonstrating what a good experience looks like for the driver:

> *"Octopus EV were amazing through the whole process - advice, guidance and delivery."*
>
> *"Our local MG dealership was knowledgeable and patient in talking us through the options."*

Dealerships and service centres are the frontline of an EV sale or transaction. They are the gateway into the sector for many drivers considering electric. Better training for staff across the full franchised and independent dealer sector is vital if we are to ensure knowledgeable handovers and services, dispel myths, and ensure consumers start their EV journey with confidence.

The National Franchised Dealers Association (NFDA) has developed a scheme for its members to help train and support staff selling electric vehicles. This Electric Vehicle Approved (EVA) scheme has been endorsed by Government, and customers visiting an EVA-approved centre should expect to experience a better level of service.

The British Vehicle Rental and Licensing Association (BVRLA) are developing a similar scheme for independent dealers, service and repair centres.

Together, these schemes have the potential to significantly improve the customer's experience at the point of sale. However, **a high level of uptake across the dealership network is needed for these schemes to have a real effect, and consideration needs to be given to how to get dealership staff into EVs themselves so that they know and understand the product that they are selling.**

A greater level of endorsement and promotion across the EV industry and by Government will be needed to raise awareness of these schemes. They will need to be continually monitored and developed to ensure more and more dealers are made aware of the benefits of driving electric, what the customer needs to know, and step into the vehicles themselves.

Pillar 2

DELIVER A PLAN TO SUPPORT HOUSEHOLDS WITHOUT ACCESS TO PRIVATE CHARGING

Electric cars are at their best when they fit into people's daily lives with minimal effort – when they can charge whilst they are sleeping or doing other activities, and when they can take advantage of their potential for substantially cheaper running costs.

The demographics of the EV driving population reflect that. Over 90% of EV drivers have access to private charging. Crucially, these drivers save up to £1,400 a year in motoring costs, paying as little as 7p per mile compared to 16p per mile for a petrol or diesel equivalent[16]. During this current spike in oil prices, some EVA England drivers are reporting savings of over £2,000 a year.

This is because these households mostly charge whilst they are at home, where they can pay as little as 7p/kWh (and currently no more than 25p/kWh) to charge their car and use the public network only for longer distance journeys.

But for those without driveways, the picture is more complicated. These households are forced to rely on the public charging network, where the average price for a residential standard charger is 54p/kWh, and a rapid charger is 79p/kWh. These drivers are paying 18p per mile to run their cars and, whilst some drivers are able to reduce these costs through subscriptions or the use of alternative technologies such as cross-pavement solutions, 50% of households without access to a private charger believe they are currently paying more to run their electric car than their previous petrol or diesel car.

Melanie Shufflebotham
Co-founder & COO of Zapmap

"At Zapmap, we have been tracking the cost of charging on the public network since November 2023 using typical use-case scenarios. Due to increasing fuel prices, we are now seeing that for EV drivers with a home charger, with a typical 80% to 20% split between home and public charging, the cost saving of running an EV compared to a petrol or diesel car is at the highest level on record.

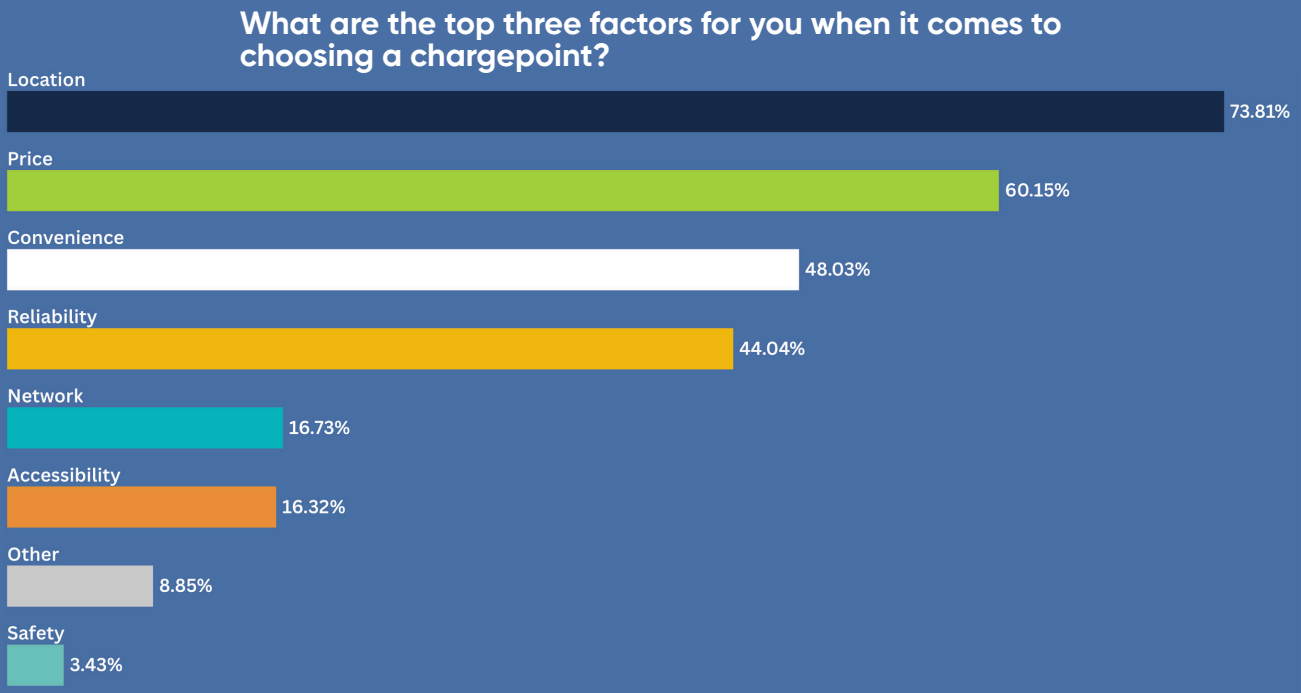
"However, as EVs move firmly into the mainstream, an increasing number of drivers will become entirely reliant on public infrastructure, risking a divide between those who have home charging and enjoy the significant cost savings and those who don't. Collaborative action is more urgent than ever. We need to ensure that the public and private sectors work in step to provide equitable access to public charging.

"We welcome the focus on accessible and affordable charging in EVA England's White Paper. Supporting CPOs to reduce cost burdens and leveraging innovative near-home charging solutions will be crucial steps toward lowering prices for drivers and maintaining momentum in the UK's transition to sustainable transport."

16 Zapmap, *UK EV Charging Price Index*, 2026

New data from our flash surveys suggests that EV drivers will go to some lengths to reduce the price they pay for public charging.

Whilst 74% of drivers feel location is a prime factor in choosing a chargepoint, 60% also focus on charging price. A third of drivers will drive to a cheaper chargepoint to reduce their bill – with 57% believing that public charging prices should be less than 45p/kWh, and far closer to the prices people with access to private chargepoints pay.



"An EV makes no financial sense for people who don't have access to home charging."

"[Running costs are] much lower but only because I can charge at home. If I had to rely only on public charging it would work out more expensive I think."

"Depends... if mostly home charging then much cheaper; but if driving long distance about the same or slightly less. Public Charging sites in UK generally way too expensive! Government should help if we are to go C-neutral asap!"

"I am lucky I can change at home and work at a low price. If I needed to use public charging a lot then it would not be as good a comparison. Public charging is generally too expensive."

Coupled with that, drivers are still reporting ongoing and significant frustrations with the charging network. Whilst 69% of EV drivers believe the network is improving, most drivers still wouldn't define their experience as 'good'.

Consumers continue to complain about:

- Chargepoints that are poorly signposted or blocked by petrol or diesel cars;
- Chargepoints that don't work;
- Chargepoints that are inaccessible to those with disabilities;
- Price shocks because pricing is not consistent or transparent;
- Issues getting their money back from pre-authorisation charges;
- Inconsistent and frustrating connection processes;
- And the ongoing need to download multiple apps to use residential standard chargers.

And there is no one formally tracking these complaints.

"In any group of chargers, there's nearly always a faulty one. This is very rare with petrol pumps"

"As a minimum, some public chargepoints at every site must be accessible to all. Bump stops must be banned! PAS1899 must continue to be developed and extended, and made law. Cable management is a massive issue for many people."

"Charging away from home is painful and expensive. The network isn't even close to being up to scratch in certain areas. Broken and slow chargers make these vehicles not viable for anyone visiting rural areas particularly in Scotland"

"More roadside signs so the wider public understand how many there are but this must include charge speed!"

EVCI operates the UK's only independent in-service calibration programme for public EV chargers, testing units in the field against a reference standard accreditation to national measurement standards.

The same regime of independent verification has protected petrol pump customers for decades. No equivalent obligation currently exists for EV chargepoints. Across approximately 18 months of testing under this programme, more than one in four chargers tested fell outside the ±2% MID Class A tolerance that applies to billing meters in law.

This means that at an 80p/kWh rapid-charging tariff, an EV driver who uses a failing charger once a week pays an extra £62.40 a year for energy they never received.

Developing the monitoring and reporting regime for performance at chargepoints is going to be absolutely vital to ensuring a thriving chargepoint market that delivers for the consumer.

Craig Marsden
CEO of EVCI

"A driver buying petrol is protected by the law every time they pull onto a forecourt. The same driver, charging an EV ten feet away at the same site, is not.

"Until in-service verification applies to public chargepoints the way it applies to fuel pumps, EV drivers will continue paying for energy they never received and they will have no way of knowing it is happening."

It is perhaps no wonder that 75% of drivers believe public charging costs are now the biggest barrier to driving electric. A sizeable 60% of drivers without driveways, in fact, say they will never go electric[17].

EV drivers without driveways are paying the costs of the transition, and they should not be. They deserve to be able to access the cheaper running costs and wider benefits and resilience of these cars, as those with driveways do. And all EV drivers deserve a seamless experience at the chargepoint. The ZEV mandate and the subsequent EV transition cannot succeed unless that happens.

We urge the Government to deliver a clear plan for supporting drivers without access to private charging in this transition, and this must be two-fold: address the charging divide and get the underlying regulatory regime right.

17 EVA England, *Steer the Conversation*, 2025

ADDRESS THE CHARGING DIVIDE

That significant difference between the price that people with access to private charging pay to recharge their vehicles, and the price that those without pay, must be narrowed significantly.

There are important alternatives available to help residents without driveway access these domestic charging rates.

Cross-pavement solutions are proven to work well for those who can park outside their house on occasion. However, less than 1% of EV drivers have been granted permission by their local council for these, despite 78% of drivers believing it would work for them[18], £25m of Government funding being allocated to support their installation, and planning permissions for them being eased. EVA England research shows that unless cross-pavement solutions are made available, residents will take matters into their own hands and trail cables across pavements to their cars. Councils must take these more formal solutions seriously.

Charger sharing platforms, where a host driver with access to private charging allows other drivers to use their chargepoint, are in operation within the UK, but the market for them is not yet mature enough or widely known about.

Many drivers want to take more advantage of **workplace charging**, where charging rates are often cheaper, but despite Government funding (of up to £500 per socket across up to 40 sockets per site) being available to support installation, workplace chargers are not widely available.

> *"There's plenty of parking at work, but no chargers. It feels like a missed opportunity."*

Small and medium-sized companies report that the workplace charging grant does not help them sufficiently with the full costs of installation. In contrast, the dedicated schools' workplace scheme has been much more successful, with funds of up to £2,000 per socket across 40 sockets per site, making the installation of chargepoints significantly more affordable.

Those in **apartment blocks, leaseholders and renters** struggle to get permission from their landlords and freeholders to install a chargepoint. Many are refused without any opportunity to discuss why. We welcomed the **Government's commitment last autumn to consult on a right to request charging for these households. We now urge the Government to publish this consultation as soon as possible.**

Anecdotes from residents also suggest that payback periods for the cost of installation and safety concerns are putting many landlords and freeholders off from agreeing to install chargepoints in apartment blocks.

18 EVA England, *Cross-Pavement Solutions: Closing the Charging Divide for Those Without Driveways*, 2026

It is also clear that cross-pavement, charger sharing and workplace charging won't work for everyone. There will always need to be a mix of charging solutions for those without access to private charging, and it still remains **vital that the prices at public chargepoints are brought down significantly**.

In the 2025 Autumn Budget, the Government announced a **Cost of Public Charging Review** that would aim to bring down the cost of charging, and is due to report its findings in autumn 2026.

That Review must deliver clear and tangible actions that result in a drop in price for consumers at the chargepoint and create a successful market for affordable alternatives. This means:

1. **A structural reform that reduces the underlying cost of delivering public charging, including:**
    - **Decreasing standing charges and removing policy levies** for chargepoint operators,
    - **Equalising the VAT** between domestic and public charging, and
    - **Incentivising dynamic pricing platforms** on the public network.

2. **Using available public funding mechanisms to incentivise better delivery of alternatives:**
    - The Government's Local EV Infrastructure **funding contracts should require local authorities to put in place models that incentivise reduced pricing and require priority consideration of the viability of cross-pavement solutions** in their area.
    - The additional £200m **funding for charging infrastructure** announced in the 2025 Autumn Budget should be **targeted where there are still ongoing market failures** to address, including:
        - **Supporting grid connections for multi-unit dwellings** that bring down the costs of installation for landlords and residents;
        - **Seed funding to look at the potential for charger sharing platforms,** and whether and how to create a sufficient market for these in the UK; and
        - Building on the success of the Schools' Workplace Charging fund to **support the rollout of chargepoints across other public sector sites, including NHS sites and state-funded leisure centres.**

GET THE UNDERLYING REGULATORY REGIME RIGHT

The Automated and Electric Vehicles (AEV) Act 2018 contained a number of protections for the consumer to improve their experience at public chargepoints. These protections were enshrined in law through the Public ChargePoint Regulations 2023 and mean that it is now mandatory for chargepoint operators to deliver 99% reliability across their network; to provide contactless payment for chargers over 8kW and roaming facilities for those under; and to make the price drivers are paying are transparent.

Yet as described above, drivers continue to experience ongoing issues across all of these protections and, as the sector is evolving, new challenges are emerging. Consumers are frustrated over poor signposting, price shocks from a lack of understanding of how much they are paying to put a certain mileage into their car, long delays to return pre-authorisation fees, and inconsistent connection processes.

At an EVA England workshop, drivers defined what good looks like for them:

- Clear signposting to the chargepoint;
- The ability to get to the chargepoint cable and plug it in easily particularly for drivers with disabilities;
- A clear understanding of the price they will be paying for the mileage they want to top up;
- Easy and consistent payment methods;
- Clear and consistent instructions on how to plug in and connect their vehicle;
- And a clear explanation of and immediate return of pre-authorisation fees.

For drivers with disabilities, a real lack of accessible chargepoints is hampering their ability to use the public network and switch to EVs. Only around 2% of chargepoints are compliant with the existing accessibility standard, PAS 1899[19], and our EVA England data shows that 47% of all drivers struggle with the accessibility of the public network.

Last year, EVA England fought hard for and succeeded in getting an accessibility clause included in the AEV Act 2018. But the next step towards achieving an accessible network is the rollout of an updated PAS 1899 standard that should be easier for operators to deliver and that any future regulation can be based on. But delivery of that updated standard has been delayed significantly. **Chargepoints are going in the ground all the time, and we need urgent action from Government and the British Standards Institute to publish that updated standard so that these chargepoints can cater for drivers with disabilities.**

There is also a real lack of transparency to drivers over who is independently monitoring and assessing chargepoint operators' compliance with the regulations. Chargepoint operators currently submit their own data on compliance for the Government to review, and the process for auditing and checking that data is unclear.

19 Vauxhall / Stellantis, *More Than a Third of Councils Still Do Not Provide EV Charging Adapted to Suit Disabled Drivers*, 2026

There is also no independent statutory customer complaints service which drivers can turn to when they encounter issues with particular networks, or seek advice from if they are struggling to recoup, for example, pre-authorisation payments. **That complaints avenue will be just as important for those with access to private chargers, who are not receiving the service or product that they originally signed up to.**

EV drivers expect – and are right to expect – a charging experience that is as seamless as filling up at a petrol pump and a transparent and adequate process for raising and resolving issues.

EVA England joined forces with Paythru and the REA to promote an industry-led Payment Charter, aiming to make EV charging as easy, reliable, and transparent as paying for anything else, giving drivers the clarity, control, and confidence they need on every journey.

The five principles below guide a shared mission to improve the EV charging experience:

1. No More Confusion Over Charging Costs

Driver benefit: Clear, familiar pricing.

Driver control: Drivers know what they're paying for and what they'll get - no technical jargon, guesswork, and no surprises.

2. Standardised and Reliable Payment Methods

Driver benefit: Pay your way - anywhere.

Driver control: No more juggling apps or accounts - just tap, charge, and go.

3. Minimise Payment Failures – Ensuring Reliability and Protecting Driver Confidence

Driver benefit: Charging that works, even when systems don't.

Driver control: Peace of mind that even if something goes wrong, they won't be left stuck – because charging is treated with the same urgency as any other essential utility.

4. Transparent Pre-Authorisation

Driver benefit: No surprises on your statement.

Driver control: Clear info on what's being held, why, and when you'll get your money back.

5. Clear Transaction Notifications

Driver benefit: Know what you paid, where, and when.

Driver control: Drivers can easily verify, manage, and claim charging costs - just like with petrol receipts.

However, fundamentally, the underlying regulatory regime is what will drive the sector in a direction that is fit for purpose for its future, and puts consumer needs at its core.

This means:

- **An urgent review of the AEV Act 2018 and subsequent public chargepoint regulations to ensure that they continue to work for the consumer.** This includes updating existing regulations to ensure they deliver what good looks like for the driver, and considering the role of additional regulations and standards around payment processes, pricing transparency, connection processes and signage.

- **An update of parallel financial regulations to make sure that payment processes at the chargepoint follow the same rules as those for the petrol and diesel market, with rapid returns on pre-authorisation fees an absolute priority.**

- **The appointment of a fully resourced independent regulator for the chargepoint sector, with clear and transparent processes for monitoring and auditing chargepoint operators' compliance with regulations; and**

- **The establishment of a parallel complaints and advisory service for consumers, similar to the service that Ofgem and Citizens Advice currently provide to support consumers with their household energy bills.**

Pillar 3

DELAY AND RE-DESIGN THE PROPOSED PAY PER MILE SCHEME (EVED)

EVA England's survey on the Government's proposed pay-per-mile scheme (eVED) - a 3p per mile tax on driving electric - captured the views of 2,448 drivers (including over 1,800 BEV drivers)[20].

The headlines were clear: EV drivers accept the principle of contributing to road use, but do not believe the current design of eVED is workable or fair. In its current form, the scheme risks undermining confidence in EVs at a critical moment in the transition and leaving drivers severely out of pocket.

The discussion surrounding the proposed scheme has led to substantial confusion amongst consumers about whether EVs are the right choice for them. The message that those driving petrol and diesel cars already pay 6p per mile through fuel duty has not cut through, and almost all drivers surveyed felt this was a tax on EVs alone.

As one driver put it:

> *"I cannot understand why PHEV have lower eVED than fully electric cars. Doesn't make sense."*

Drivers' willingness to recommend their EV to family and friends drops from 95% to 78% because they are unsure what the implications of eVED will be on household budgets.

Drivers also expressed strong concerns about upfront payments, with around 70% worried that being required to estimate and pay for mileage in advance and with no clear, widely applicable refund regime in place, meant they would never see their money back.

77% of drivers do not want third parties (such as leasing or insurance companies) managing eVED payments on their behalf, fearing that their administrative costs for delivering the scheme will be passed onto the driver. And all drivers believe that paying for international miles, and therefore the use of the roads in another country, is unfair.

> *"What happens if I sell half way through? How do I get my overpayment back?"*
>
> *"There is too much risk of overpaying and not getting the money back quickly."*
>
> *"If I could just use a web site to submit my mileage and pay it there [in arrears] and then - analogous to reading my own electricity meter - that would enable me to manage the cost. It would mean I didn't need to estimate a whole year where my driving habits may change, e.g. by charging job or moving house."*

20 EVA England, *The Driver's View on Pay Per Mile (eVED) for EV Drivers*, 2026

The Government cannot go ahead with its proposed eVED scheme until the barriers discussed above regarding upfront costs and public charging have been addressed. And it must work for drivers from day one – there can be no mistakes, and drivers cannot be left out of pocket.

This means delaying implementation until at least 2030, when cost and infrastructure barriers have been addressed.

It means considering replacing fuel duty with a pay per mile tax for all vehicles, so that petrol, diesel, plug-in hybrid and EV drivers are all clear on how much they are paying for use of the roads, and EV drivers always pay half or less than half of the price that non-EV drivers pay.

And it means getting the design of the scheme right:

- **Moving away from upfront estimated payments to a system based on actual usage;**
- **Introducing a clear and fast refund mechanism for overpayments;**
- **Exempting international miles; and**
- **Protecting consumers from surcharges for spreading their payments and from third parties passing administrating costs of delivering the scheme onto them.**

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