EVA England

STEER THE CONVERSATION

EVA England Survey Report 2026

Steer the Conversation
EVA England Annual Survey Report 2026

Acknowledgements
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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.

FOREWORD

Electric cars are much cheaper to run, far easier to drive and a better fit for my family life. That is the view of the thousands of EV drivers that we at EVA England represent. 93% of EV owners would recommend their car to friends and family, and will choose electric for their next car.

But their lived experience is at odds with what the wider driving community is hearing. Ongoing misinformation, a divisive debate around EV targets and the looming threat of eVED are leaving even the drivers most likely to switch to electric confused about the choice they are being asked to make.

Upfront cost is still a major barrier for many, while an expensive and unreliable public charging network is putting off those without driveways. Together, these issues are holding back real demand for electric cars.

However, nearly half of petrol and diesel drivers, and three quarters of plug-in hybrid drivers, now say they will transition to electric if these structural barriers are addressed.

The Government's cost of public charging review is an opportunity to take urgent action to make driving electric affordable for the 40% of households without private charging. Pair this with Public Charge Point Regulations that work for the driver and are properly monitored and enforced by an independent Chargepoint Regulator, and Government incentives that are retargeted towards those who need them the most, then we have potential to unlock a huge amount of pent-up demand.

But above all, we must stop the noise. Government, Parliamentarians and industry must present a united and consistent message that electric vehicles are the future of UK road transport. That means no back and forth on targets, and a tax system that encourages, rather than disincentivises, drivers to switch by delaying any new pay per mile system.

The UK has always been a leader in EV uptake. It can continue to hold that position by focusing on what matters to drivers: making the cars work for them.

- Dr Victoria Edmonds
CEO, EVA England

"We are at a critical juncture in moving away from diesel, and it is worrying to hear that driver confidence in the transition is wavering due to issues around daily usability and fair access. We cannot allow a widening 'charging divide' or unreliable infrastructure to stall progress.

"As more drivers make the switch, tax frameworks and cost models will naturally need to adapt, but electric vehicles must remain an attractive, sensible choice. To achieve that we need reliable charging networks on our streets, alongside the workforce, skills and expertise in local garages and dealerships to keep those vehicles safely on the road."

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

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EXECUTIVE SUMMARY

Electric car sales are booming. There are 2,280,000 EVs on UK roads[1]; just over 100,000 were sold in September alone; and at 26.1% of sales across 2026 so far, we are ahead of the UK's effective EV sales targets[2].

But the public debate around EVs is getting more and more divisive – fuelled by lack of knowledge about these cars, misinformation, and structural barriers to their uptake.

Our biggest EVA England driver survey to date – with 2,635 responses from across the EV and non-EV driving community – delivers some powerful messages from drivers to Government and industry about their experiences with and perceptions of these cars. **Addressing their needs will be vital if we are to see a successful and sustainable transition to electric driving.**

93%
of EV drivers would recommend an EV to friends and family

94%
of EV drivers report lower running costs

88%
of EV drivers can charge from their home electricity supply

48%
say the public network has improved, down from 69% last year

1

EV drivers remain strongly content with their cars, but confidence in the wider transition is under pressure.
93% would recommend an EV to friends and family, and 93% plan to stay electric; but 71% feel the very public and divisive debate around electric cars fails to reflect their experience, and 38% believe recent Government announcements and policy changes – notably around the proposed new pay per mile scheme (eVED) and the public debate on the ZEV mandate - have affected confidence in driving electric.

2

The financial case for driving electric is strong, but the price of getting an EV still holds too many back.
94% of EV drivers report lower running costs, yet 52% still say upfront cost was a major purchase hurdle to overcome, and 41% of non-electric drivers say they would go electric if these cars were cheaper. EVs are still largely the preserve of the wealthy, with less than 30% being driven within households on lower and middle incomes of less than £49,999 a year.

1 Zapmap. UK EV Market Share & Registration Stats 2026
2 New AutoMotive. Electric Car Count. September 2026

3

Home charging remains fundamental, and the two-tier transition is becoming more and more of a problem.
88% of EV drivers can charge from their home electricity supply. For those unable to do so, and reliant on the public network, only 32% now say their electric car is cheaper to run than their previous petrol or diesel car, compared to 50% last year – marking a clear and increasing charging divide. The cost benefits of going electric are being realised by households able to access private charging but not by those who cannot. This charging divide continues to be the biggest structural barrier to the success of the ZEV mandate and wider EV transition and needs urgent attention.

4

Public charging is growing, but drivers' experiences on the network are worsening, and this area needs far more focus from Government, Parliamentarians and industry, with more consistent standards and accountability.
The number of EV drivers who believe the public charging network is improving has dropped from 69% last year to 48% this year. Drivers continue to be frustrated by chargepoints that don't work, difficulties reporting and resolving problems, unclear prices, and complex payment and connection processes. EV drivers deserve an experience at the chargepoint that is as seamless as filling up at a petrol pump – and an industry that is driving towards that and taking their frustrations seriously.

What do these findings mean?

Those already driving electric overwhelmingly love their cars. But inconsistent Government and industry messaging, ongoing misinformation, and very public, divisive debates around electric cars and wider clean technologies are affecting people's confidence in EVs and their willingness to recommend them to friends and family.

Drivers are hearing conflicting messages from Government, MPs and industry: on the one hand, they're being told that these are the cars of the future, yet on the other they're hearing about weakening of EV targets and the introduction of what is perceived as a new tax on EV drivers in the form of eVED. Misinformation across all forms of media, and inadequate knowledge about EVs at dealerships, where many drivers go to ask their first questions about going electric, are fuelling that uncertainty.

Drivers are confused, and even those who are positive about the transition become uncertain about whether to buy electric, or what to recommend to friends and family.

EV drivers are also still overwhelmingly from high-income households with access to private charging. Upfront costs and a public charging network that continues to be too expensive and too unreliable are still presenting major structural barriers holding back many drivers who want to go electric, but cannot see a way to do so.

The current debate around the strength of the ZEV mandate targets is a case in point. The ongoing discussion between Government, car manufacturers and the charging industry is centred on whether there is enough demand for EVs - but demand that is being measured in terms of actual orders or sales, not demand that is measured in terms of real consumer interest in switching to electric. It is clear from our survey that there is a significant amount of that pent-up interest - 49% of petrol and diesel drivers and 76% of plug-in hybrid drivers responding felt they would go electric for their next car if the barriers holding them back were addressed. Auto Trader has reported strong and steady numbers of enquiries about electric cars[3], and dealerships are seeing increasing interest as a result of rising fuel prices[4].

Government and industry must shift their focus away from this constant and confusing debate about meeting EV targets and towards addressing these structural barriers and unlocking this sector for those who want to drive electric but cannot.

WHAT ARE WE ASKING FOR?

At EVA England, we published a White Paper in June - 'Putting the Driver First'[5] - that made clear the steps we, as drivers, believe need to be taken to make the switch to EVs affordable and accessible for all households. The evidence from this drivers' survey shows that these asks not only still stand, but are becoming more and more urgent if we are to show that EVs can work for people, and maintain a successful transition. This is an opportunity for policymakers, regulators and industry to stop, listen to what drivers are saying, and act upon it.

1 Improve driver confidence in EVs

- **Government must deliver a stronger, consistent and stable policy framework that provides drivers with a clear signal that choosing electric is the right choice. This means:**
  - No further changes to the existing EV targets within the ZEV mandate, and a commitment to avoid repeated reviews and attacks from industry on these targets that largely play out in the media.
  - A delay to the proposed pay per mile tax (eVED) until at least 2030, with a redesign of the scheme to make sure that it works for drivers from day one – with payments in arrears rather than upfront, the introduction of a rapid and transparent refund regime, protection for drivers from third-party charges, and an exemption for international miles.

- **Government and industry must take greater action to improve information for customers at the point of sale, across franchised and independent dealerships:**
  - Greater collaboration across manufacturers, fleets, leasing companies and skills academies to ensure that training programmes such as the new EV Retail Ready scheme co-produced by the British Vehicle Rental and Leasing Association (BVRLA),

3 Auto Trader. Monthly Market Intelligence. September 2026.
4 Motoring Research. Demand for used electric cars soars as fuel prices rise. October 2026.
5 EVA England. Putting the Driver First. June 2026.

the Independent Motor Dealer Association (IMDA) and EVA England, and the parallel National Franchised Dealers Association (NFDA) 'Electric Vehicle Approved' scheme, are being promoted and rolled out across as many retail and service centres as possible, so that when a driver first starts to ask questions about whether their next car should be an electric one, they are being given the reassurance and confidence to take that step.

2 Improve affordability and trust, and unlock demand

- **In the run-up to Budget 2026, EVA England is reiterating its calls for Government to:**
  - **Retarget the Electric Car Grant 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 electric vehicles** until at least 2035, the end of the transition period.
  - **Increase confidence in the used EV market through accelerating the introduction of a UK battery health standard** that provides drivers with consistent advice on battery performance – and coupling that with 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.

3 Deliver a plan to address the 'charging divide'

- **The outcomes of the Government's Cost of Public Charging Review, announced in the Budget 2025, must be published urgently and must deliver sustainable structural reform that reduces the price drivers pay at the chargepoint**, with the aim of bringing that price closer to that which drivers with access to private charging pay. This might include a reduction in standing charges for chargepoint operators, removal of the additional policy levies these operators pay, and incentivisation of dynamic pricing across the public charging network.

- **An urgent interim measure that allows for an immediate reduction in charging price must also be delivered through:**
  - Equalisation of VAT between domestic and public charging; and
  - Introduction of social leasing bundles which wrap lower cost, longer-term leases for lower and middle income households together with charging credits, simplifying and reducing the overall price of the transition for these households.

- **The Government must also:**
  - **Use available public funding mechanisms, including the Government's Local EV Infrastructure contracts, to incentivise better delivery of alternatives,** by requiring local authorities to put in place models that incentivise reduced pricing for consumers, and requiring priority consideration of the viability of technologies that allow residents to access domestic, cheaper charging rates, including cross-pavement solutions and charger sharing technologies.

- **Target EV infrastructure funds where there are still ongoing market failures to address**: support grid connections for multi-unit dwellings that bring down the costs of installation for landlords and residents; and extend the successful Schools' Workplace Charging fund to other public sector sites, including NHS sites and state-funded leisure centres.

4 Deliver significant improvements in the public charging experience

- **EVA England continues to call for the appointment of a Public Chargepoint Regulator, including a consumer complaints service and Ombudsman.** This must be a fully resourced independent statutory body, or set of statutory bodies, with a clear remit to monitor and audit chargepoint operators' compliance with the Public Charge Point Regulations 2023, and to provide a transparent route through which EV drivers can submit complaints about the public charging network and seek independent advice, support and resolution to these complaints.

- **This must be accompanied by an urgent review of the AEV Act 2018 and Public Charge Point Regulations 2023 to ensure that they deliver for the consumer.** This includes updating the existing regulations to ensure a minimum level of service to the driver – that fits with what good looks like for the driver - and considering the role of additional regulations and standards, including around connection processes and signage.

- **A clear push is also needed from Government to ensure that public chargepoints comply with existing financial regulations** so that payment processes at the chargepoint follow the same rules as those for the petrol and diesel market.

ABOUT THE SURVEY

2,635 responses

2,251 EV drivers

238 petrol & diesel drivers

146 hybrid drivers

EVA England's Steer the Conversation 2026 survey ran from 24 August to 21 September 2026 and received 2,635 responses, including 2,251 battery electric vehicle (BEV), 238 petrol and diesel, and 146 hybrid drivers.

Respondents opted into the survey, and some chose not to answer additional questions on their detailed experiences and living circumstances, so the base varies by finding. Results describe those surveyed rather than a population-weighted national sample. Figures are rounded. Year-on-year comparisons are used only where questions are sufficiently comparable.

1. DRIVER CONFIDENCE

EV drivers are extremely satisfied with their cars, with our surveys continuing to show incredibly high confidence metrics – 93% of the thousands of drivers responding to this year's survey would recommend their car to friends and family, and 93% confirmed that their next car will still be electric.

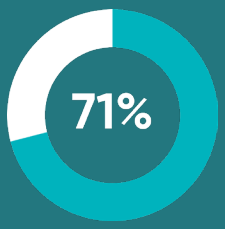
However, despite this, and increasing sales of EVs (with over 100,000 new EVs sold in September alone, and representing 26.1% of sales in the year to date[6]), only around 5.5% of all driving households have so far chosen to go electric. Confidence in the wider transition is under pressure due to widespread misinformation and inconsistent Government and industry messaging.

There is also a widening gap between the true experience of driving electric and the ways in which it is perceived by the public; and a mounting frustration from drivers that too little is being done to make switching to electric work better for them.

KEY FINDINGS

of EV drivers plan to stick with an EV for their next car

are likely or very likely to recommend an EV to friends or family



say the public debate around EVs does not accurately represent their experience as an EV driver

How have recent Government announcements and policy changes affected your confidence in owning an EV?

The debate about the Zero Emission Vehicles (ZEV) mandate – the UK's EV sales targets – is playing out too publicly and divisively. This is a complex debate that involves a range of issues that are affecting UK manufacturing, such as trade tariffs. But all that drivers see is inconsistent and confusing messaging that, on the one hand we are meeting our EV sales targets - with the latest sales data suggesting that the UK is well ahead of its targets for this year[7] - but on the

6 New AutoMotive. Electric Car Count. September 2026
7 New AutoMotive. Electric Car Count. September 2026

other hand, we want to weaken them, with Parliamentarians and industry publicly calling for reductions in the targets and the Government, in August, launching a review of the mandate[8].

On top of that, drivers are hearing about the introduction of what is being perceived as an EV tax in the form of the proposed new pay per mile scheme, or eVED, in 2028.

In March, we published the results of a survey of 2,448 EV drivers[9] that showed that whilst many believe that they should ultimately pay for their use of the roads, the majority felt strongly that the introduction of a pay per mile scheme as early as 2028 is creating a level of messaging and policy uncertainty that will have a negative and lasting impact on the transition to electric vehicles – an impact that has likely been underestimated by the Government. Nearly all EV drivers expressed frustration that the initial scheme design has been put together without consultation with drivers, and that their needs have not been taken into account. They have real and significant concerns that the current scheme proposals – where they must pay upfront for mileage they may never do, with no proper refund regime in place - will leave them substantially out of pocket.

"Pay per Mile has stopped us considering an EV - it starts at 3 pence but in ten years it will be 30 pence..."

"My main factor in going electric was the availability of a lease scheme with my employer, which made it financially much more attractive than buy[ing an] ICE car. New schemes from the government like VED and pay per mile may change this decision when it comes for renewal. Having colleagues/friends with real life experience of using EVs gave me the confidence to order one"

"With the impending additional taxation, those relying on public charging will see little or no financial benefit to a higher up-front purchase cost, and ICE being cheaper to run in many cases. That is & would be a significant [step] backwards"

We are now seeing from this survey that 38% of drivers are feeling less confident about owning and recommending an EV due to Government policies such as eVED. Indeed, a third of hybrid drivers and a quarter of petrol and diesel drivers have flagged uncertainty over future taxation costs as a primary factor preventing them from buying electric.

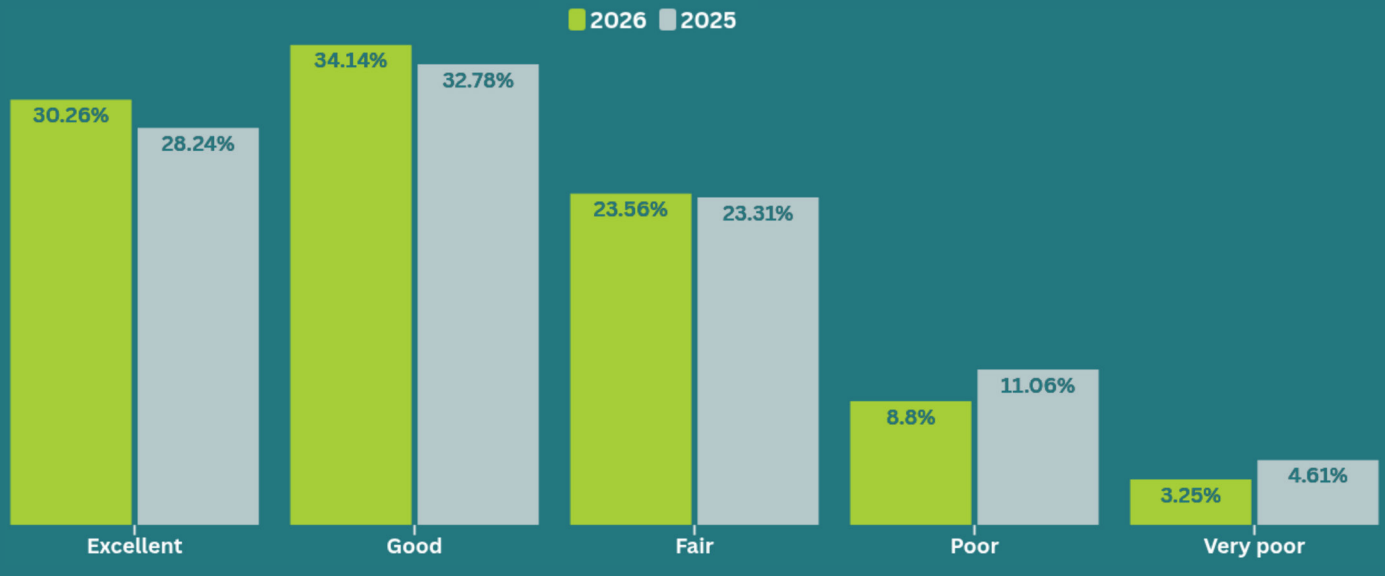
What drivers are not seeing are the reassuring messages that they need: that these cars can, in many circumstances, work for them; and that where they don't, Government is committed to addressing barriers so that they will.

8 Department for Transport. Zero emission vehicle mandate review. August 2026.
9 EVA England. The driver's view on pay per mile (eVED) for EV drivers. March 2026.

Part of that uncertain messaging is down to their experience at car dealerships, often their first port of call when thinking about making the switch to an EV.

Our 2025 EVA England survey showed that nearly one in four (23%) EV drivers described their experience at dealerships as fair, and 16% as poor or very poor. In 2026, those figures have not changed significantly with 24% of drivers rating their experience as fair and 12% as poor or very poor.

How EV drivers rate their handover experience:



Drivers felt that basic knowledge about EVs and charging just wasn't there:

"There was no advice available, indeed they did not seem to know how to manage charging"

"EV knowledge - they know how to sell cars, but not about EVs or EV ownership"

In addition, many EV drivers feel an absence of real support from the Government. Only 5% of drivers surveyed say recent Government announcements and policy changes have increased their confidence in going electric. In our 2025 survey, 66% of petrol and diesel drivers said they had considered getting an EV. This has dropped to only 47% this year, with appetite to switch among non-electric drivers being shaken not only by misinformation and inconsistent messaging from Government and industry, but also by a lack of action to address the barriers holding them back.

Indeed, 49% of petrol and diesel drivers, 66% of hybrid drivers, and 76% of plug-in hybrid drivers responding to this survey said that they would make the switch to full electric vehicles if the major barriers holding them back – such as upfront cost and access to charging - disappeared. That is a significant amount of pent-up demand that could be unlocked if the focus of Government, Parliament and industry turned away from constant back and forth over targets and towards a concerted effort to address these barriers.

WHAT ARE DRIVERS ASKING FOR?

The following sections of this report focus on the main structural barriers - cost and charging access - that are curbing demand by preventing many people from making the switch. Real attention must be given to what drivers are saying about these barriers, and action taken to ensure that Government incentives and regulation, and automotive and charging industry action, are focused on addressing them.

However, with three of the biggest factors influencing confidence in EVs being ongoing misinformation and lack of knowledge at the point of sale, the divisive public debate over the ZEV mandate and the looming threat of eVED, drivers also need:

- **A stronger, consistent and stable policy framework that provides drivers with a clear signal that choosing electric is the right choice. This must include:**
  - No further change to the existing EV targets within the ZEV mandate, and a commitment to avoid repeated reviews and attacks from industry on these targets that largely play out in the media.
  - A delay to the proposed pay per mile tax (eVED) until at least 2030, and a redesign of the scheme to make sure that it works for drivers from day one – with payments in arrears rather than upfront, the introduction of a rapid and transparent refund regime, protection for drivers from third-party charges (including from MOT centres and leasing companies), and an exemption for international miles.

- **Greater action to improve information for customers at the point of sale, across franchised and independent dealerships:**
  - EVA England partnered with the BVRLA and the IMDA to introduce EV Retail Ready – a training programme dedicated to improving knowledge about EVs across independent used car dealerships and subsequently, the driver's experience.
  - But far greater collaboration is needed across manufacturers, fleets, leasing companies and skills academies to ensure that training programmes such as this, and the parallel NFDA 'Electric Vehicle Approved' training scheme, are being promoted and rolled out across as many retail and service centres as possible so that when a driver first starts to ask questions about whether their next car should be an electric one, they are being given the reassurance and confidence to take that step.

2. AFFORDABILITY, TRUST & UNLOCKING DEMAND

EV drivers, notably those with access to private charging, are overwhelmingly and consistently finding their EV cheaper to run than their previous petrol or diesel car – with 94% of drivers responding to this year's survey finding that is the case.

"When I had a petrol car it would cost me about £75 a month in petrol. Now it's probably around £25."

"Recently did a road trip in Spain & France with 4 adults in an MG4. We covered 980 miles and used the Tesla supercharger network throughout. Total charging costs were about £80...I estimate that petrol costs would have been 2-3 times that amount"

"Had 3 electric cars now and we have found them reliable and cheaper to run than our previous petrol cars (at the present time)"

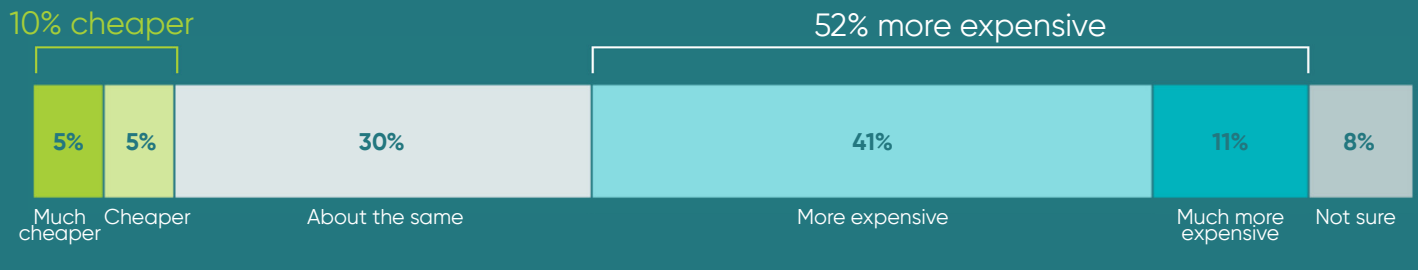
However, despite the average price of new electric cars being reported as cheaper than petrol or diesel[10], many drivers are still finding upfront cost a significant obstacle, particularly in the new EV market. 41% of petrol and diesel drivers cite upfront cost as one of the primary barriers preventing them from buying an electric car, and around half of EV drivers said upfront cost was a hurdle that needed to be overcome.

"Great to drive, cheap to run. But we won't be able to buy for a while because the upfront cost is too high"

"...Upfront cost puts some people off. They can't afford it."

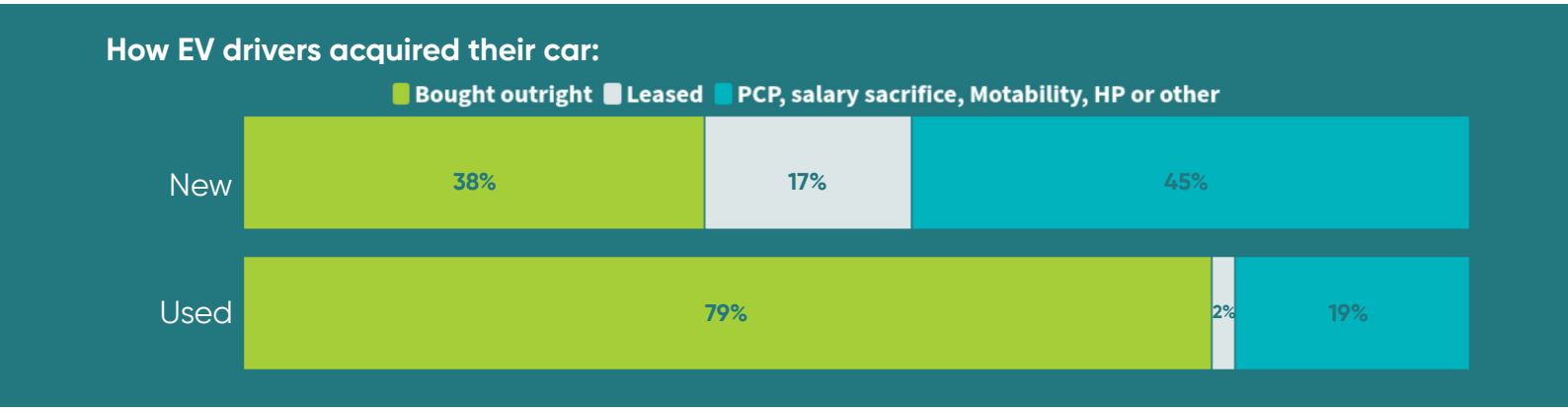
"...Most disabled people cannot afford large upfront costs to get the car they need."

How did the upfront cost of your EV compare with a petrol or diesel car?

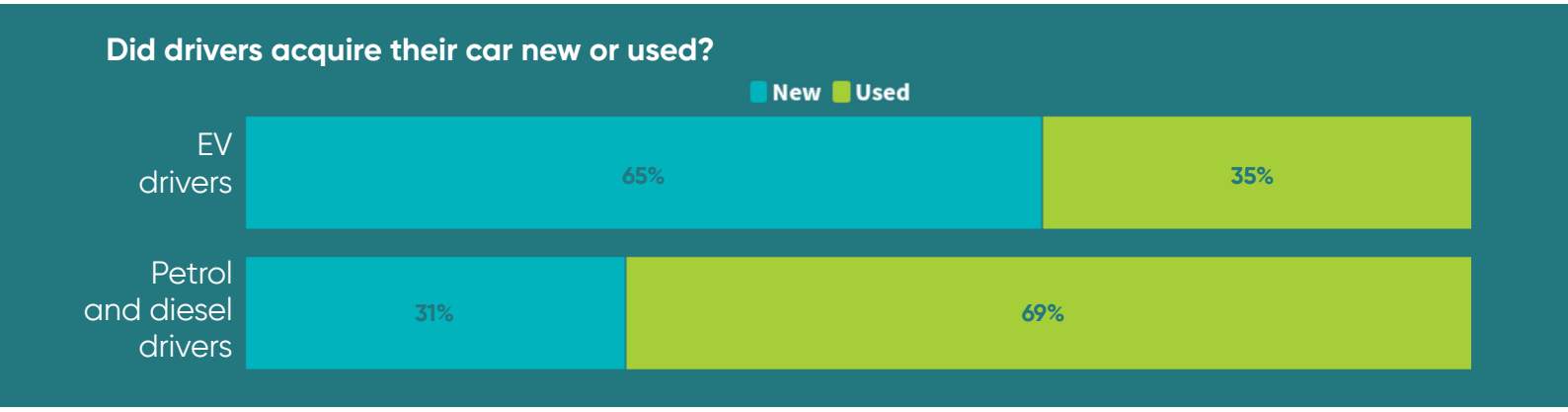


Among EV drivers, almost two-thirds acquired their car new, while just over one-third acquired it used – a continuing sharp contrast to the wider market where around 70% of all drivers buy their car used, and in line with the trends also seen in our 2025 annual survey.

10 AutocTrader. New EVs are now cheaper than petrol cars on average – is now the time to buy? April 2026.



Across private new EV sales, whilst around a third purchase their car outright, large and increasing numbers are purchasing through Personal Contract Purchase or leasing packages - with the proportion purchasing through leasing packages increasing from 11% last year to 17% this year. This is, again, in contrast to the used EV market where the majority of sales are outright purchases.



THE IMPORTANCE OF LEASING

Within the private car market, increasing numbers of new EV drivers are stepping into their cars through leasing and salary sacrifice schemes. Anecdotes suggest that even those sceptical of going electric often make the leap because EVs are the cheapest option on their company car scheme. The role that these schemes are playing in the transition should not be underestimated, and Government support to incentivise the switch to electric through these schemes, in the form of benefit-in-kind rates for EVs, must be continued.

But our work also shows that these schemes are again, generally, the preserve of the wealthy, with salary sacrifice schemes being targeted at those earning on average around £43,000 per year[11]. Only 29% of EV drivers responding to our 2026 survey are on lower and middle incomes of less than £49,999 per annum.

11 Cambridge Econometrics. Access to lower cost electric cars and vans. January 2026.

In contrast, 75% of households across the UK are within these middle and lower income brackets. Projected average monthly transport costs for these households are around £100. Even with the discounts being offered through the Government's Electric Car Grant, the cheapest monthly lease is £140 – and most are over £200, putting EVs out of reach of many of these households[12].

We know from the introduction of the popular and oversubscribed French social leasing scheme that when the price and incentives are right, these households will go electric.

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 15 km were eligible, and a total of 50,000 applicants were approved for Government-backed leasing contracts of between €100 to €150 a month.

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.

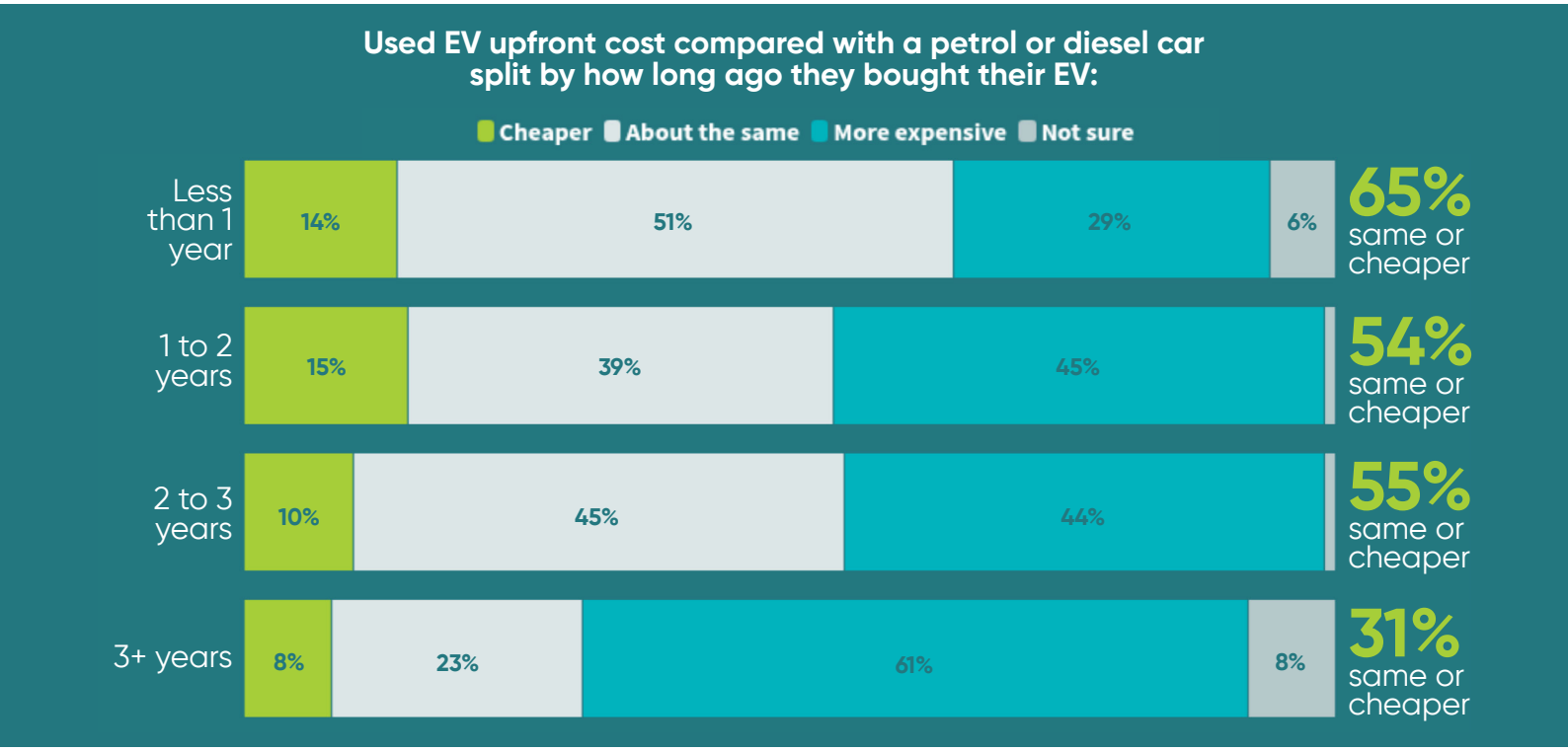
Our work with our partners at Transport & Environment shows that the introduction of a similar subsidised leasing scheme in the UK could increase the number of EVs on UK roads by 950,000 by 2035[13] – a considerable amount when you consider that the Electric Car Grant has subsidised 190,000 vehicles to date[14].

THE ROLE OF THE USED EV MARKET

It is also clear from our surveys that the attractiveness of the used EV market continues to lag behind the wider used market. But why is this the case?

Our survey results show that across the used market, more and more drivers are finding EVs affordable. Indeed, 65% of EV drivers buying a used EV less than a year old found it cheaper or the same price as an equivalent petrol or diesel car. A third of EV drivers buying a used EV 3-5 years old found it cheaper or the same price.

12 Cambridge Econometrics. Access to lower cost electric cars and vans. January 2026.
13 Cambridge Econometrics. Access to lower cost electric cars and vans. January 2026.
14 Department for Transport. Drivers to save up to £300 when installing EV chargers at home, as government slashes unnecessary red tape. October 2026.



Prices on the used EV market can be volatile. However, as the market matures, these cars are now becoming more affordable and attractive, and data from Auto Trader suggests there is ongoing momentum and increasing demand for used EVs[15]. But our survey data shows that whereas 70% of drivers across the full car market are buying used, less than a third of EV drivers are (and less than a quarter last year). If the prices are starting to be right, what is holding drivers back in that market?

Confidence in the battery, as well as the lack of knowledge at independent used dealerships discussed above. Around 40% of petrol, diesel, and hybrid drivers cite range or battery concerns as one of the primary barriers holding them back from taking the step into an electric car. Government's work to develop a battery health certificate and standard is vital and needs speeding up.

15 Auto Trader. Monthly Market Intelligence. September 2026.

WHAT ARE DRIVERS ASKING FOR?

With upfront cost still being a key barrier preventing many from making the transition to electric, ongoing subsidies and Government action will be needed through the full period of the EV transition, to 2035 and possibly beyond. But this action cannot just be targeted at the wealthy – it must ensure that those who want to go electric but genuinely cannot afford it are being offered a way to do so.

In the run-up to Budget 2026, EVA England is reiterating its calls to:

- Retarget the Electric Car Grant 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 battery electric vehicles until at least 2035, the end of the transition period.
- Increase confidence in the used EV market through accelerating the introduction of a UK battery health standard that provides drivers with consistent advice on battery performance – and couple that with 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.

3. THE CHARGING DIVIDE & THE TWO-TIER TRANSITION

Access to home charging remains absolutely fundamental to making electric driving work for people. 88% of EV drivers have access to private charging and are benefiting from paying as little as 7p/kWh and no more than 26p/kWh in driving costs – an average of 7p per mile, compared to 16p per mile for a petrol or diesel equivalent[16]. These drivers can accrue savings of up to £1,400 a year[17], and during this current spike in oil prices, some EVA England members are reporting savings of over £2,000 a year.

At EVA England, we estimate, however, that around 40% of households do not have access to private charging – either living in accommodation without private parking, renting, or living in flats.

Only around 10% of EV drivers fit into this category, with just 4% of EV drivers responding to our survey living in flats. These drivers are reliant on a public network with increasingly high public charging costs. The average price for a standard residential charger is currently 54p/kWh, and for a rapid charger 79p/kWh – translating to an average cost per mile for drivers using the public charging network of around 18p.

This year, only 32% of EV drivers without access to private charging found they were paying less to run their EV than their previous petrol or diesel car, compared to 50% a year ago. 42% of EV drivers are now reporting that public charging costs have increased for them over the past year.

"Public charging is the biggest drawback to owning an EV. Not enough chargers and cost is very high. Long distance can work out more expensive than petrol /diesel."

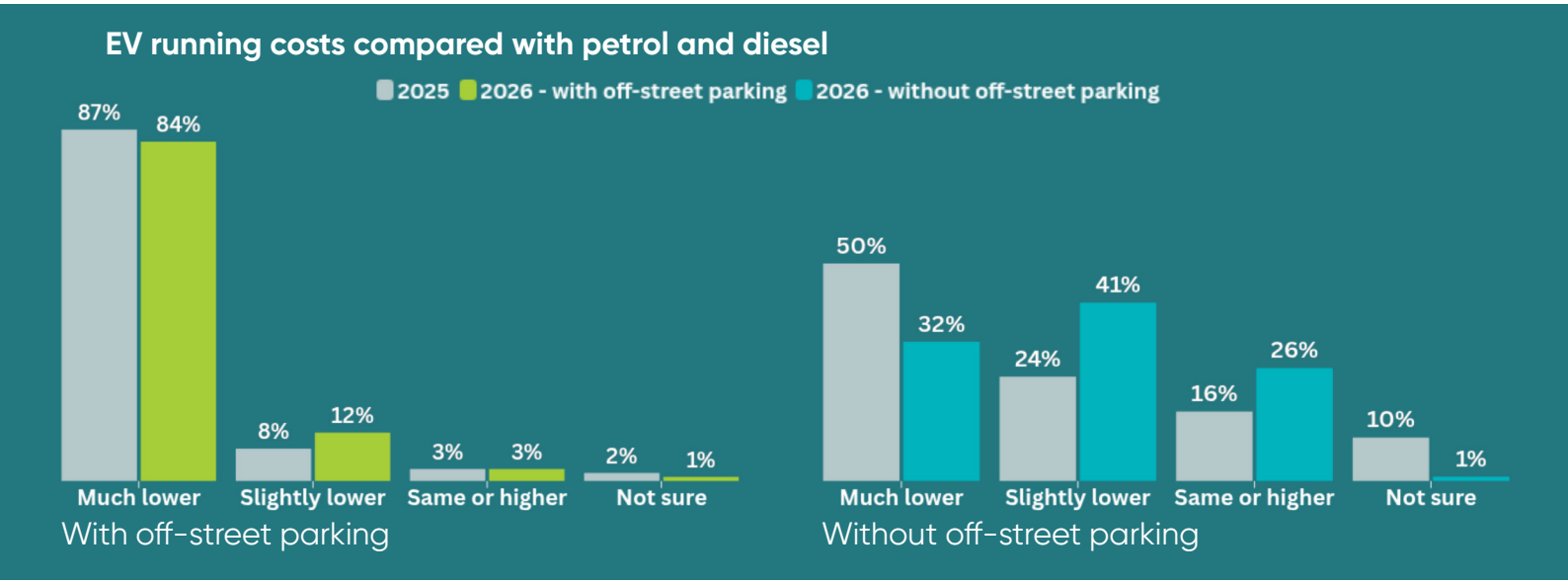
"The government VAT rate applied to public charging is a disincentive to some ev ownership and is unfair and should be scrapped"

"I am keen to move to an electric vehicle, but like many people in the UK I do not have a private driveway and therefore cannot install a conventional home charging point. At present, this remains one of the biggest barriers to making the switch to an EV..."

"Public charging is extremely expensive compared to home charging. I cannot home charge so have NO option but to pay up to 15 times more! Very unfair!"

In 2025, 50% of EV drivers without off-street parking reported much lower running costs than petrol or diesel, compared with 87% of those with off-street parking. This year, just 32% of drivers unable to charge at home report these substantial savings, compared with 84% of those who can.

16 Zapmap. UK EV Charging Price Index 2026: cost per kWh. October 2026.
17 Zapmap. UK EV Charging Price Index 2026: cost per kWh. October 2026.



This data presents a stark picture about the cost of the transition for those without driveways. They should not be asked to pay significantly more to run their car than their neighbours who have access to private charging. Yet there is mounting concern – among existing EV drivers and those considering the switch – that too little is being done to tackle affordability of public charging, and that costs will continue to increase.

In our White Paper[18], we noted that whilst location is a key factor in choosing a chargepoint for 74% of drivers, 60% also focus on charging price and a third of drivers will drive to a cheaper chargepoint to try to reduce their bill.

At a workshop held between EVA England members without access to private charging and the Chair of the Government's cost of public charging review, drivers highlighted how much luck is involved in being able to access affordable charging. Drivers who do manage it tend to live near chargepoints where the operator offers cheaper or subsidised subscription-based charging rates, or they have been able to install a cross-pavement solution.

These drivers highlight that it is hard work. Despite 78% of drivers without access to private charging believing it is an option for them, only 1% have been able to install a cross-pavement technology[19]. Comparing prices between different chargepoint operators is not easy, with 35% of EV drivers rating this as difficult or too difficult, and many stressing that having to drive to a chargepoint with a lower charging rate shouldn't be necessary.

CROSS-PAVEMENT TECHNOLOGIES

EVA England has long promoted the benefits of cross-pavement technologies such as gullies and gantries, as an essential way to help those without driveways who can, on occasion, park outside their house, access their domestic electricity rates and charge at

18 EVA England. Putting the Driver First. June 2026.
19 EVA England. Drivers urge government to act on 'charging divide'. January 2026.

the same price as those with a driveway. 18% of drivers responding to our survey said that a cross-pavement solution was an essential prerequisite to them getting an EV.

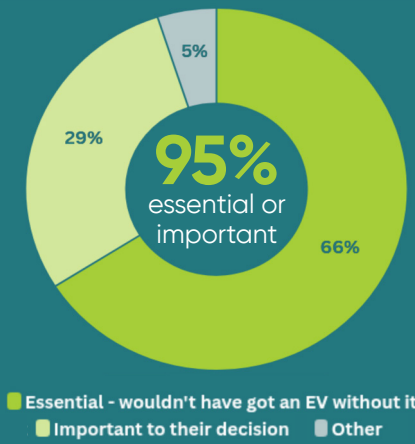
We fought hard for the recent statutory change to extend Permitted Development Rights for cross-pavement technologies and so ease the associated planning costs and processes for drivers, and were delighted to see this come into force on 21 October. Yet even with that, and the £25m Government fund for local authorities to further reduce the costs of installation, our 2026 annual survey shows that only 1% of EV drivers are able to access these technologies. 2% are now taking matters into their own hands and just running cables across the pavement.

Local authorities must take these technologies seriously and do all they can to help those residents for whom this is a viable option get them approved and installed – or we will see more and more drivers using their own solutions, creating a far less safe environment for all residents.

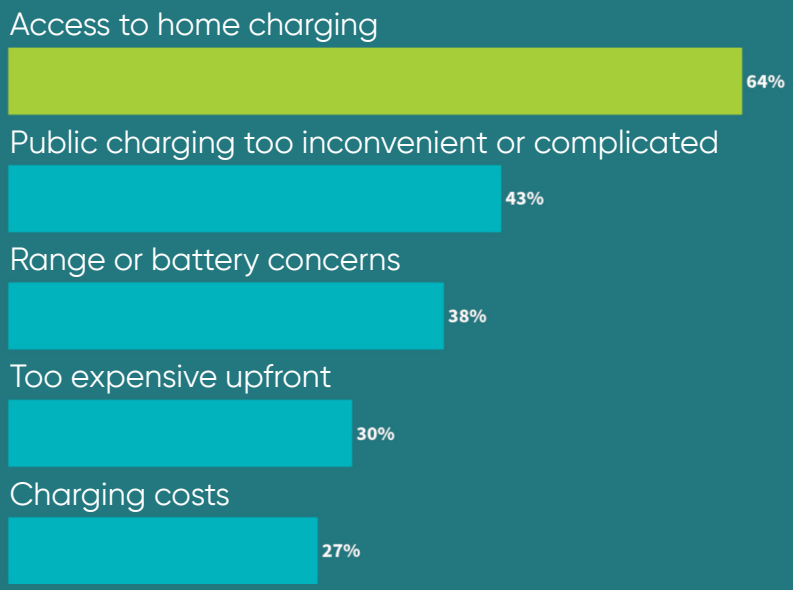
The charging divide is perhaps the single greatest barrier to the delivery of a sustainable and successful ZEV mandate and EV transition.

As a sector, we cannot ask people to transition to a technology where they will be paying more to run their new car than their previous petrol or diesel car and, as we discuss below, rely on a public network that is hard to access and use. 95% of EV drivers said access to home charging was an essential or important part of their decision on whether to switch to electric, and 64% of petrol and diesel drivers say without it, going electric will not be an option.

Importance of home charging in EV drivers' decision to switch



Top 5 barriers stopping petrol and diesel drivers without off-street parking from switching



WHAT ARE DRIVERS ASKING FOR?

We welcomed the launch of the Government's cost of public charging review in Budget 2025, but the outcomes of that review are now due and must be announced urgently.

The Review must:

- **Deliver sustainable structural reform that reduces the price that drivers pay at the chargepoint,** with the aim of bringing that price closer to that which drivers with access to private charging pay. This might include a reduction in standing charges for chargepoint operators, removal of the additional policy levies these operators pay, and incentivisation of dynamic pricing across the public charging network.

- **Deliver an urgent interim measure that allows for an immediate reduction in charging price through:**
  - Equalisation of VAT between domestic and public charging; and
  - Introduction of social leasing bundles which include charging credits, so simplifying and reducing the overall price of the transition for lower and middle income households.

The Government must also:

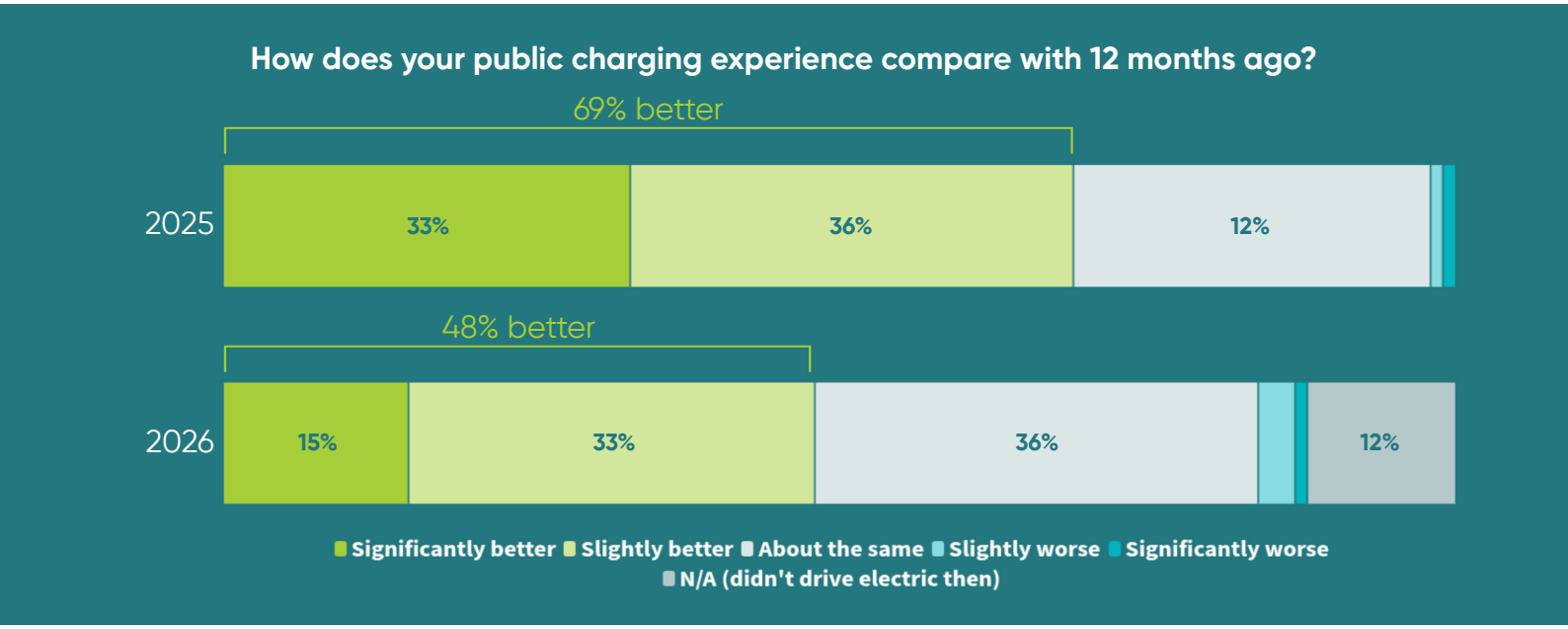
- **Use available public funding mechanisms**, including the Government's Local EV Infrastructure contracts, **to incentivise better delivery of alternatives**, by requiring local authorities to put in place models that incentivise reduced pricing for consumers, and prioritise consideration of the viability of cross-pavement solutions and charger sharing technologies in their area.

- **Target EV infrastructure funds where there are still ongoing market failures to address:**
  - Supporting grid connections for multi-unit dwellings that bring down the costs of installation for landlords and residents; and
  - Extending the successful Schools' Workplace Charging fund to other public sector sites, including NHS sites and state-funded leisure centres.

4. PUBLIC CHARGING EXPERIENCE & ACCOUNTABILITY

The public charging network is growing, with nearly 125,000 connections across 48,000 locations[20]. This is fantastic progress, and visible availability of chargepoints, to potential and new EV drivers particularly, is paramount to a successful transition.

But if a chargepoint doesn't work, if it cannot be accessed, if a driver can't find where it is, it might as well not be there. Last year, 69% of EV drivers responding to our survey said the public charging network was improving. This year, that number has dropped to 48%. Among petrol and diesel drivers, 38% cite the inconvenience and complexity of public charging as a major barrier holding them back; and around half of hybrid and plug-in hybrid drivers say it is preventing them from taking the final step towards battery electric vehicles.



Nearly one in four EV drivers say that public chargepoints aren't usually in good working order. Drivers spoke about chargers being blocked by other vehicles, poor signposting, confusing payment and connection processes and poor connection speeds.

49% of drivers felt that pricing was confusing and not at all transparent.

"Public charging is not reliable, we always have a plan B as our desired charge point could be in use, broken, or blocked"

"Charging costs are rarely shown 'up front' at public charging points. They should be more obvious - similar to the prices posted at petrol stations, where you can see the charges before you drive up. It shouldn't take several clicks on an app AFTER arriving at a charge point"

"Public charging has improved but there are still too many issues, such as confusing screens/ instructions, connection issues and high costs, which are frustrating, especially for less techie people"

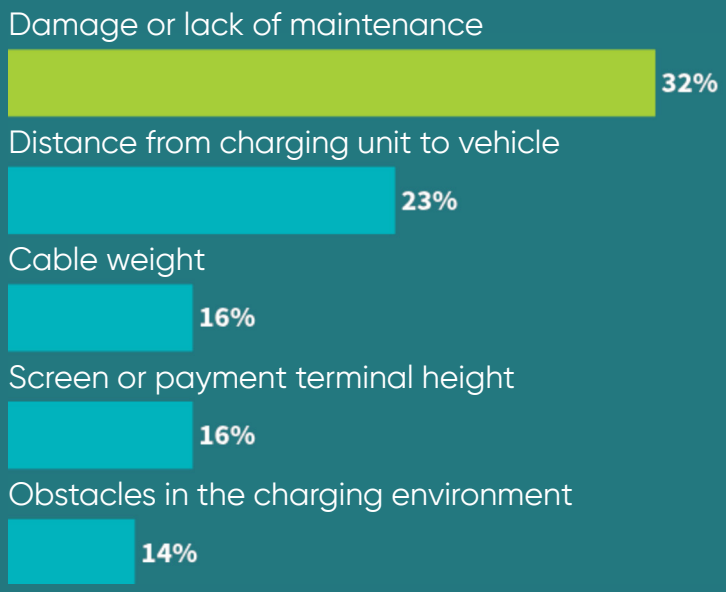
20 Zapmap. EV Charging Statistics 2026. October 2026.

A third of drivers highlighted damage and subsequent lack of maintenance being an issue; and up to a quarter of drivers are still finding real accessibility issues including around the distance between the charging unit and vehicle, cable weight, obstacles in the surrounding environment and screen and payment terminal heights.

"I would love to go fully electric, but I can't rely on the charging infrastructure as I use a wheelchair"

"EV charging stations are not easy to use. Some sort of shelter would be good in rain and snow also protection from sun. Most I've used are difficult for a wheelchair user"

Top 5 accessibility issues at public chargepoints



Perhaps most astonishing is that among respondents who had experienced a public charging problem, 44% said they did not know they could or how to report it, were unable to get through to the operator to resolve the issue, or tried to report it but received no response.

EV drivers deserve a charging experience that is as seamless as refuelling a petrol or diesel car. That is not the service they are receiving, and there is a mounting sense of frustration across the EV driving community that their asks for a basic minimum level of service are being largely ignored.

THE AUTOMATED AND ELECTRIC VEHICLES (AEV) ACT 2018

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 Charge Point 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 transparent.

Last year, EVA England fought hard for and succeeded in getting an accessibility clause included in the AEV Act 2018, based on the existing accessibility standard for public chargepoints, PAS 1899, which sets out detailed accessibility requirements for public EV chargepoints – including minimum parking bay sizes suitable for wheelchair users, placement of bollards, and the positioning and orientation of payment terminals.

It is not sustainable to continue rolling out a charging network that doesn't work for the consumer, and relying on the existing regulations alone is not proving effective at incentivising delivery of a network that provides a basic level of service for EV drivers. Ongoing issues around access, reliability and payment processes show that without proper monitoring and enforcement of those regulations, including the establishment of a statutory independent consumer complaints service, too many issues are slipping through the cracks.

Drivers must feel that when they have a complaint about the network, it is being listened to, and they must see tangible progress in the form of a charging network that is fit for their needs. That is absolutely essential if we are to see more and more drivers on the mass market having the confidence to switch to electric.

WHAT DRIVERS WANT IMPROVED MOST

60% want chargers to be available and working

59% want charging to be easy to pay for and connect to

42% want clearer and more transparent prices

34% want better signposting

32% want the charging speed delivered to match expectations

At an EVA England workshop, our 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;
- Easy and consistent payment methods;
- A clear understanding of the price they will be paying for the mileage they want to top up;
- 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.

WHAT NEEDS TO CHANGE

EVA England continues to call for the appointment of a Public Chargepoint Regulator, including a consumer complaints service and Ombudsman.

- This must be a fully resourced independent statutory body, or set of statutory bodies, with a clear remit to monitor and audit chargepoint operators' compliance with the Public Charge Point Regulations 2023, and to provide a transparent route through which EV drivers can submit complaints about the public charging network and seek independent advice, support and resolution to these complaints.

- **This must be accompanied by an urgent review of the AEV Act 2018 and Public Charge Point Regulations 2023 to ensure that they deliver for the consumer.** This includes updating the existing regulations to ensure a minimum level of service to the driver – that fits with what good looks like for the driver - and considering the role of additional regulations and standards, including around connection processes and signage.

We must also see a clear push from Government to ensure that public chargepoints comply with existing financial regulations to make sure that payment processes at the chargepoint follow the same rules as those for the petrol and diesel market – and crucially, that pre-authorisations are returned to the driver immediately, as they are for the wet fuel market.

EVA England

Electric Vehicle Association England

Registered Address:
Southgate Chambers
37-39 Southgate Street
Winchester SO23 9EH

0203 822 0811
info@evaengland.org.uk
evaengland.org.uk

Electric Vehicle Association England
Registered non-profit Community Interest Company (England) no. 12649115