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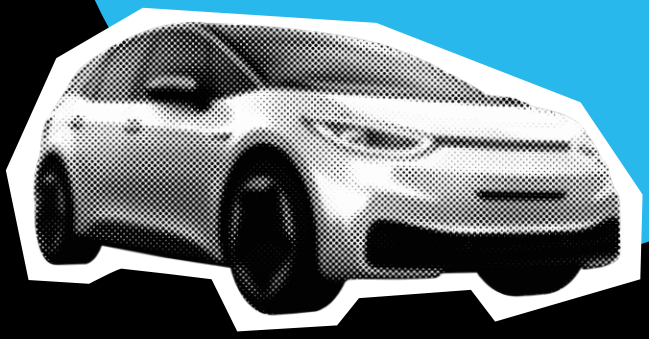
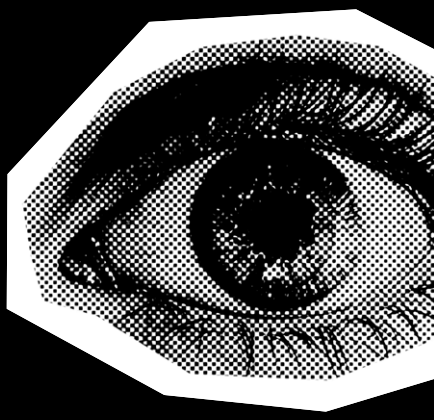


WHAT EVERYONE SHOULD KNOW ABOUT EVS



SEPTEMBER 2025

Foreword

What Everyone Should Know About EVs

The shift to electric vehicles is no longer a question of if, but when. Yet, as this report so clearly shows, the barriers to adoption are not just technical; they're psychological, practical, and deeply human. Misconceptions persist, access remains unequal, and for too many drivers, the EV future still feels out of reach.

This matters because to meet the UK's net-zero commitments, we must move beyond early adopters and make electric mobility a reality for everyone. That means busting outdated myths, addressing cost concerns head-on, and most importantly, delivering the infrastructure that makes EV ownership simple and seamless – ensuring that everyone can access reliable charging irrespective of where they live.

At Electrifying.com, we've built our reputation as the UK's electric car experts by listening to and engaging with drivers every day. Our highly engaged audience consistently shares with us the very questions and concerns explored in this report – from worries about charging access to uncertainty around costs and confidence in new technology.

The data tells us that interest is strong: over two-thirds of drivers are open to going electric within five years. But openness alone won't move the needle. We need clarity, confidence, and convenience – especially at the kerbside, where drivers need to park.

The good news? We can do this. The technology is here, and the public will exists. Our challenge now is to accelerate the rollout of equitable charging solutions and give people the information they need to make the switch with confidence.

What Everyone Should Know About EVs reminds us that facts change minds, access changes behaviour, and together, they can change the future of transport.

Ginny Buckley Founder & CEO, Electrifying.com

char.gy's View from the Kerbside

For too long, the conversation about electric vehicles (EVs) has been dominated by misconceptions, half-truths, and headlines that fall short. At char.gy, we believe the best way to accelerate the shift to electric is not just to build infrastructure, but to dismantle misinformation.

This report sets the record straight. From range anxiety to charging myths, from cost perceptions to battery life fears, we've unpacked the assumptions holding millions of drivers back from making the switch. The truth is not only more encouraging, but it's also liberating.

The Problem Isn't Demand. It's Access.

The UK isn't short of curiosity. More than two-thirds of drivers say they'd consider an EV in the future. But only 5% have taken the leap. Why? Because the system still assumes everyone has a driveway.

At char.gy, we see things differently, literally. We see kerbs, lamp posts, pavements. We see millions of people living in terraced homes, flats, and urban neighbourhoods without off-street parking. People who are just as ready to go electric, if only they had somewhere to plug in.

That's why we're building a national network of convenient, affordable, on-street EV charging, designed for real life, not just press releases. This isn't about luxury, it's about levelling the playing field.

Myth busting Highlights: What the Data Really Shows

Range is not the issue: Most EVs already exceed 200–300 miles on a single charge, which is well beyond the daily driving needs of most people.

Charging doesn't take all day: Home and kerbside charging happen overnight, quietly and conveniently. Ultra-rapid public chargers add 80% in 30 minutes.

Batteries don't die after 3 years: Most last 10–15 years with minimal degradation.

EVs aren't unaffordable: The upfront cost may be higher, but the lifetime cost of ownership is often lower, especially with smart charging and off-peak tariffs.

Public charging isn't rare: The UK now has over 70,000 public chargers and is growing fast. However, what matters is not just quantity, but also usability, visibility, and fairness.

[illegible]ty Means On-Street Charging

EV adoption is uneven. Affluent, male, mid-life homeowners dominate current ownership. Meanwhile, younger, more diverse, urban populations are left watching from the sidelines, interested but underserved.

This report makes clear: the biggest blocker is not scepticism but charging access. Over 70% of EV rejecters say they simply don't know where they'd charge. That's not a failure of interest; it's a failure of infrastructure.

char.gy is here to fix that. By transforming everyday lamp posts and curbsides into powerful, invisible charging stations, we are democratising access to clean transport, one street at a time.

Our Call to Action

If we want to meet the UK's Zero Emission Vehicle mandate targets, we must do more than celebrate EV milestones. We must remove the friction for everyday drivers:

- Make on-street charging cheaper, not more expensive.
- Build where people park, not where it's convenient for operators.
- Myth-bust like its mission-critical, because it is.
- Think like drivers, not just policymakers.
- We're not just powering cars. We're powering confidence. And confidence begins with clarity.
- The EV future is coming. But for millions, it's stuck at the kerb. Let's plug that gap.

char.gy
EVs Empower

The Argument in Brief

Observation #1 – Interest in EVs is High, But Adoption is Low

While 63% of UK drivers are open to owning an EV within five years, only 5% currently do. This is not a lack of curiosity, but a sign of systemic barriers preventing willing drivers from making the switch.

Observation #2 – The Biggest Barrier is Access, Not Attitude

The EV market assumes driveway charging, yet millions live in flats or terraced homes without off-street parking. This single infrastructure gap excludes a large, ready-to-convert audience.

Observation #3 – Persistent Misconceptions Suppress Uptake

Myths about range, cost, battery life, and charging availability persist. Where facts are provided, willingness to consider EVs increases sharply, particularly among cautious long-term considerers.

Observation #4 – Public Charging is the Weakest Link

Eighty-eight per cent of current EV owners are dissatisfied with public charging due to cost, availability, and reliability issues. For non-owners, lack of charging access is a significant psychological and practical deterrent.

Observation #5 – The Second-Hand Market is Critical to Mass Adoption

With four out of five UK car sales being used vehicles, expanding the affordable second-hand EV market (with warranties and finance options) will be pivotal to mainstream uptake.

Observation #6 – EV Interest Mirrors Social and Geographic Divides

Ownership and strong consideration are concentrated among affluent, urban, tech-forward demographics. Lower-income groups and rural communities remain underserved, risking a two-tier transition.

Observation #7 – Timing and Targeting are Crucial

Short-term considerers are disproportionately young, urban, and ready to buy within 12–24 months. This is a live market opportunity that will be lost if rapid, visible infrastructure deployment is not made.

Observation #8 – Price Sensitivity is the Dominant Decision Driver

Even where environmental values align with EV ownership, cost and perceived affordability remain the tipping points. On-street charging that is cheaper than home charging could unlock significant adoption.

Observation #9 – Emotional Barriers Require Different Messaging

For rejecters, climate arguments rarely resonate. Localised, peer-led proof of convenience, reliability, and cost savings is far more persuasive than abstract policy goals.

Observation #10 – Policy and Infrastructure Must Meet People Where They Live

National EV targets will not be met by focusing solely on marketing or fleet sales. The fastest route to adoption is equitable on-street charging in dense residential areas, priced competitively with home charging, and supported by targeted myth-busting.

Conclusion – The EV Transition is a Confidence Problem, Not a Curiosity Problem

The market is not waiting for demand to appear—it is waiting for access, affordability, and reassurance. Without urgent investment in equitable on-street charging, accessible second-hand EVs, and myth-busting campaigns aimed at underserved communities, the UK will stall well short of its electrification goals. The solution is not to push harder on those already convinced, but to remove the practical and psychological roadblocks for the many who are ready in principle but stuck in practice.

Contents

Executive Summary

Our report is based on a nationally representative survey of 1,005 UK drivers aged 18 and above, and a supplementary boost sample of 206 current EV owners, conducted online by YouGov between April 4 and 11, 2025. Quotas were applied to age, gender, region, and social grade to ensure coverage across the UK driving population, and the dataset was weighted accordingly. The research was supplemented by attitudinal and demographic profiling via YouGov Profiles.

The study explores the full adoption journey: awareness, perceptions, motivations, barriers, charging behaviours, and expectations of future mobility. Segment-specific analysis was conducted across four groups:

1. **Current EV owners**
2. **Short-term considerers** (intend to buy an EV within 12 months)
3. **Long-term considerers** (open to an EV in the next 1–5 years)
4. **Rejecters** (not considering an EV at all)

While electric vehicles are increasingly visible in public discourse and policy planning, adoption remains modest: **only 5% of drivers currently own an EV**, despite **63% being open to the idea within five years**. This report identifies the two most significant barriers impeding wider uptake:

Perception problems are widespread and persistent.
More than 8 in 10 UK drivers believe EVs are too expensive and that public charging infrastructure is insufficient. These concerns are particularly acute among rejecters, who cite battery lifespan, safety, and driving range as additional reasons for hesitation. Encouragingly, the study shows that **fact-based information significantly increases the willingness to consider an EV, especially among long-term considerers, where a 12-percentage-point** uplift was observed following exposure to myth-correcting statements.

Infrastructure access is a structural constraint. The data reveals a stark divide: **90% of EV owners charge at home**, while **72% of rejecters say they wouldn't know where to charge**.

This aligns with broader concerns among non-owners, who cite cost, speed, and coverage of public infrastructure as top deterrents. Even among EV owners, dissatisfaction with public charging is high: **88% report frustration**, particularly with cost differentials between home and public charging. This suggests that **perceived inconvenience is a barrier for non-owners, while genuine inconvenience persists for owners**.

Segment analysis shows that **short-term considerers** (24% of all drivers) are disproportionately young (18–24), urban, high-income, and actively in the market for a new car. **Long-term considerers** (36%) tend to be older, more cautious, and responsive to education and incentives.

Rejecters are more likely to be rural, over 55, and lack access to reliable information or home charging options.

Implications for Policy and Infrastructure

These findings carry important implications for government, industry, and infrastructure providers. Despite significant national interest in EVs, practical and psychological barriers are preventing large sections of the public from participating in the transition. The data suggests the key to unlocking adoption is not simply more marketing, but a dual strategy of education and equitable access.

At char.gy, we believe this means focusing efforts where the market has traditionally failed: **on-street charging** for households without driveways. By embedding EV access into existing residential infrastructure, lamp posts, kerbsides, and urban streets, we are helping to ensure the benefits of electrification reach all communities, not just those with off-street parking.

We hope this research supports local authorities, transport planners, and policymakers in:

- Understanding the fundamental drivers of EV hesitation
- Identifying high-impact infrastructure investment zones
- Tailoring public engagement strategies to address prevalent myths
- Designing inclusive EV policies that close, not widen, gaps in mobility access

The barriers are clear. So is the opportunity. If we meet drivers where they live, literally and figuratively, we can move faster, go further, and do it together.

Everything You Should Know About EVs: The Panel Debate

On 22 August, a panel of leading voices in the UK electric vehicle (EV) sector gathered to discuss the findings of "*Everything You Wanted to Know About EVs*," a new report informed by YouGov research. Hosted by We Are Unchained's Simon Leadbetter (centre), the discussion featured (L-R) Kevin Chang (KC Talks EV), Melanie Shufflebotham (ZapMap), Our Host, Isabella Goldstein (Bold Voodoo), and Yann Marston (char.gy). The session examined public perceptions, market dynamics, and the path forward for mass adoption.

Myths, Perceptions and Reality

The panel began by tackling persistent misconceptions. Concerns about range, charging convenience, and cost remain barriers; however, the data show that most fears are unfounded. Modern EVs typically deliver 180 miles or more on a single charge, while the average UK driver travels only 150 miles per week. As Chang noted, range anxiety is “more psychological than

practical", compounded by what some now call "bladder anxiety", drivers' worries about stopping more frequently than their cars require.

Cost, Depreciation and the Used Market

Cost remains a divisive issue. Shufflebotham emphasised that while upfront prices can be higher, running costs are often lower, particularly for those with home charging. Marston pointed out that for 40% of UK households without driveways, public charging is more expensive, although workplace and on-street options are expanding. The panellists agreed that the maturing used EV market, buoyed by ex-lease vehicles, is steadily addressing affordability.

Charging Infrastructure and Visibility

Infrastructure growth was a recurring theme. ZapMap's data shows a 30% increase in UK charge points over the past year, with rapid hubs accelerating confidence. Visibility, both physical and through apps, plays a critical role in adoption. Goldstein argued that the ability to "see" chargers, whether on streets or on a smartphone screen, is as important as their actual availability.

Policy, Incentives and the Road Ahead

Government policies, including the 2030 ban on petrol and diesel and the ZEV mandate, were recognised as vital in setting direction. However, panellists stressed that incentives and infrastructure investment must keep pace, particularly to ensure parity for drivers without home charging. Leadbetter concluded that the industry's focus should be on the persuadable majority rather than entrenched sceptics.

The debate closed with consensus: wider adoption will depend on improving the public charging experience, lowering costs, and providing potential buyers with direct exposure through test drives and transparent information.

You can find the debate video at https://youtu.be/zqVLhW4NvJM

The History of Electric Vehicles: From Curiosity to Catalyst

Electric vehicles (EVs) are not new. In fact, they've been around longer than petrol cars. What's changed is everything else: the technology, the infrastructure, the urgency, and, crucially, public perception. To understand how EVs went from Victorian experiments to a cornerstone of climate strategy, we need to look back before we look forward.

Origins: A 19th-Century Innovation (1830s–1880s)

The first electric vehicles predated the internal combustion engine. In the 1830s, inventors like Robert Anderson in Scotland and Ányos Jedlik in Hungary were experimenting with battery-powered carriages and early electric motors. Progress accelerated in the 1850s with the invention of the rechargeable lead-acid battery by Gaston Planté, a breakthrough that made mobile electric power viable.

The First Golden Age (1880s–1914)

By the late 19th century, EVs were competing head-on with steam and petrol. In 1884, British inventor Thomas Parker built the first production electric car in Wolverhampton, featuring technologies that were decades ahead of their time: hydraulic brakes, four-wheel steering, and high-capacity batteries.

In the U.S., electric taxis, most famously the Electrobat, operated in New York and Philadelphia. By 1900, EVs held the land-speed record, and brands like Detroit Electric and Baker Electric sold thousands of vehicles with ranges up to 80 miles.

Decline and Dormancy (1920s–1970s)

Despite early promise, EVs lost ground rapidly in the 20th century. Petrol cars became cheaper (thanks to Henry Ford), faster, and easier to fuel (thanks to widespread oil discoveries). For decades, electric power was relegated to niche uses: milk floats, forklifts, golf buggies.

Interest only revived during the oil shocks of the 1970s, which exposed the fragility of fossil fuel dependence. Governments funded research, but the technology couldn't yet compete on range, speed or price.

Rebirth and Rejection (1990s–2000s)

The 1990s saw the first genuine attempt to reintroduce EVs at scale. General Motors' EV1, developed in response to California's zero-emission mandate, was the first purpose-built modern electric car. It featured regenerative braking and keyless start, but the programme was cancelled, the cars crushed, and the industry retreated again.

The Modern Era: A Revolution in Reverse (2008–Present)

The turning point came in 2008, when Tesla launched the Roadster, the first highway-legal EV with real performance and range (244 miles). Suddenly, electric wasn't a compromise, it was aspirational.

This opened the floodgates. The Nissan Leaf (2010) brought electric driving to the mainstream. The Tesla Model 3 (2017) redefined mass-market appeal. Global EV sales passed 10 million by 2020, 17 million by 2024. Today, EVs represent more than 20% of new car sales worldwide.

The UK's Role in EV History

Britain has been at the forefront of EV innovation since day one, from Parker's 1884 prototype to London's Bersey electric taxis in the 1890s. But like many nations, the UK's EV efforts went quiet for much of the 20th century.

That changed in the 2010s with policy-driven support:

- Plug-in car grants (2011–2022)
- Zero Emission Vehicle (ZEV) mandate (2024 onwards) requiring 80% of new cars to be electric by 2030
- Major investments in public charging and vehicle incentives

The UK now boasts the largest battery-electric vehicle market in Europe, with nearly 400,000 BEVs sold in 2024, but challenges remain. Private adoption lags fleet uptake, and regional disparities in infrastructure persist.

Looking Ahead

From pioneering beginnings to policy-driven acceleration, the EV story is still being written. What's clear is this: the shift to electric is no longer hypothetical. It's happening. The only question is whether infrastructure, perception, and access can keep up.

And range, once the Achilles' heel of the electric car, is rapidly becoming its crown jewel.

In 2010, the average EV could barely manage 80 miles on a charge. By 2021, that figure had almost tripled to 219 miles. Today, it's approaching 300, with premium models matching or exceeding the 520-mile benchmark that internal combustion engines (ICEs) have hovered around for over a decade.

But it's what comes next that truly alters the calculus. By 2030, average ranges are forecast to reach 750 miles, thanks to solid-state and silicon-based batteries. And by 2035, we enter

uncharted territory: graphene and lithium-sulphur technologies could make 1,000 miles the norm, and “thousands” a possibility. In short, the EV will not just rival the ICE, it will completely eclipse it.

We've been here before. The difference now? We know how the story went last time: the electric vehicle lost out to a faster-moving, more aggressively marketed technology. But this time, we have every reason, and more importantly, every resource, to change the ending.

This is not the beginning of the end for petrol and diesel. It's the end of their supremacy.

Why Your Driveway Might Be the Real EV Gatekeeper

Busting the Biggest EV Myths

Are Electric Cars the Future of the Motor Industry?

Belief in the EV Future: A Tale of Two Countries

This map lays bare the stark postcode divide in public belief about the future of electric vehicles (EVs). While urban, affluent, and tech-forward areas strongly associate EVs with progress, large parts of the UK remain unconvinced, if not outright sceptical.

Where EV Optimism Reigns

The strongest belief that "electric cars are the future of the motor industry" is concentrated in London's central and inner boroughs. West Central London (WC) tops the table with a net belief score of +80%, followed by East Central (EC), East London (E), and South West London (SW), all above +50%. These areas are characterised by:

- High public transport usage and congestion charges
- Greater climate consciousness
- Higher disposable incomes
- Better EV visibility and charging infrastructure

Other forward-looking urban areas include Cambridge, Liverpool, and Manchester, reflecting young, university-linked, or tech-influenced populations.

Where EV Scepticism Dominates

At the other end of the spectrum, belief in EVs plummets in rural and remote postcodes, particularly in Scotland and the far South West:

Hebrides (HS) has the lowest net belief score (-45%), with only 8% agreeing that EVs are the future.

Lerwick (ZE), Carlisle (CA), Perth (PH), and Dumfries (DG) follow, where infrastructure gaps and long travel distances breed practical resistance.

Even urban-adjacent areas like Southend-on-Sea (SS) and Peterborough (PE) underperform on optimism.

These areas often combine lower EV visibility with limited public charging options, lower average incomes, and greater reliance on older diesel vehicles, compounding a perception that EVs are "not for people like us."

Strategic Implications

The map highlights a critical challenge: while national policy promotes electrification, public belief, and therefore behavioural intent, remains fragmented.

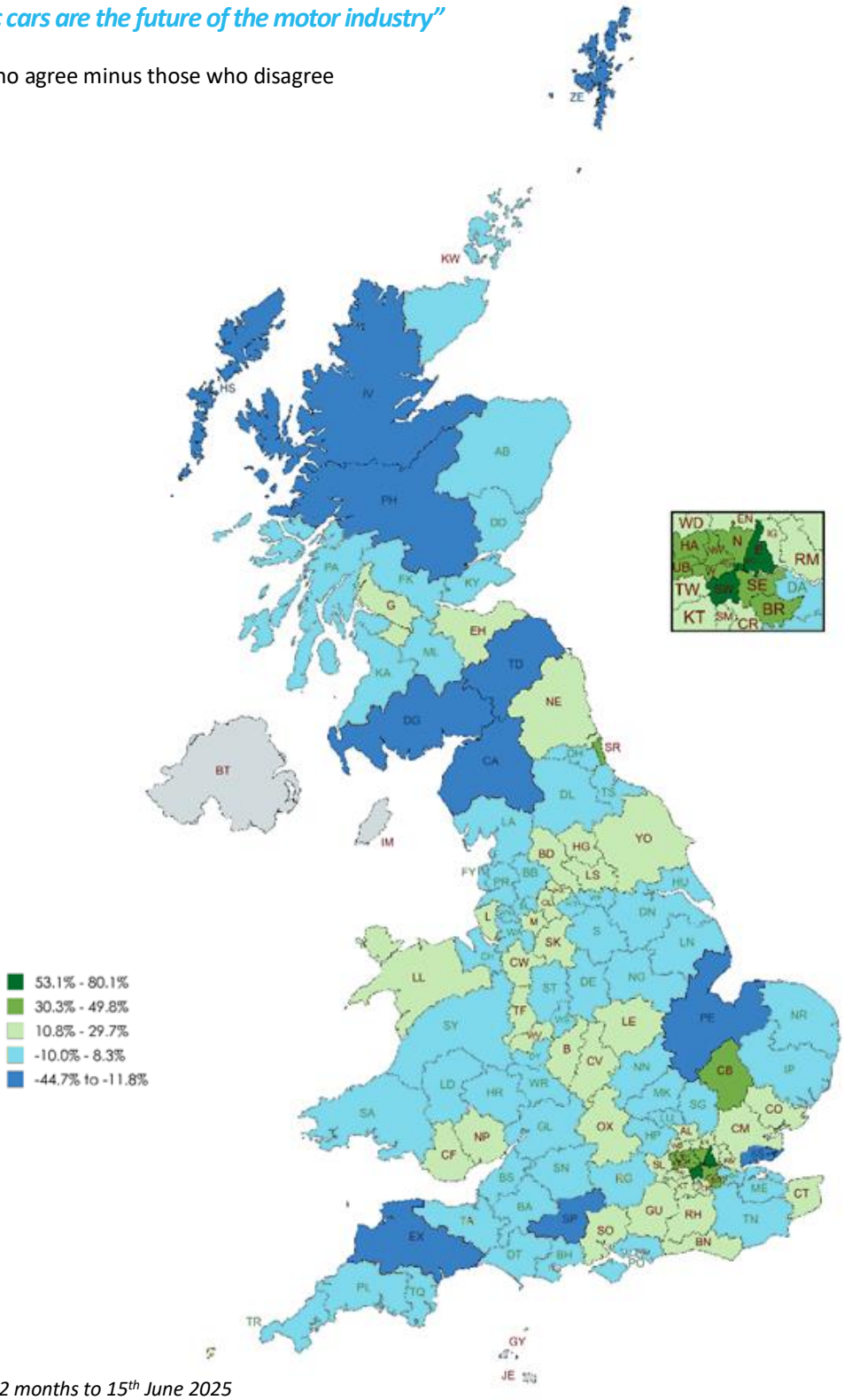
To bridge the divide:

- Hyper-local myth-busting campaigns should be prioritised in sceptical areas.
- On-street and rural charging solutions must be visible and affordable, not just announced.
- Peer-led messaging, especially from trusted community figures, will be key in shifting attitudes where distrust of media and central government runs high.

In short, belief in the EV transition is not evenly distributed. For the UK's electric ambitions to succeed, we must first convince the places that feel left behind.

"Electric cars are the future of the motor industry"

Those who agree minus those who disagree



YouGov, 12 months to 15th June 2025

Are electric vehicles finally becoming the more affordable choice for UK drivers?

In just five years, the price landscape of electric vehicles (EVs) in the UK has undergone a transformation as dramatic as the technology itself. From a market once dominated by high-cost early adopters, the electric vehicle (EV) sector is now rapidly evolving toward mainstream affordability, driven by falling battery costs, increased competition, and shifting consumer expectations.

As of 2025, the average cost of a new EV in the UK stands at approximately £46,000. This includes a broad spectrum, ranging from entry-level models like the Dacia Spring at £14,995 to luxury offerings exceeding £300,000. Yet beneath this surface diversity lies a deeper trend: falling prices and narrowing parity with petrol cars. Non-luxury EVs now average around £33,000, with an increasing number of models priced to compete directly with their internal combustion engine (ICE) equivalents.

Historically, the story has been anything but linear. Between 2020 and 2022, used EV prices spiked due to high demand and pandemic-era supply chain shortages. However, by mid-2023, a sharp correction set in. Prices of used EVs dropped over 20% in six months, driven by discounted new models, fleet returns, and consumer uncertainty. The average cost of a used EV fell from £30,441 in May 2023 to just over £24,000 by early 2025. Tesla models bore the brunt: by April 2025, the Model 3 dipped below £20,000, while the Model Y saw a 36% drop in under two years.

New car prices followed a similar pattern. By 2024, a record 77% of new electric vehicles (EVs) were sold with some level of discount. The average markdown reached 11%, reflecting a more competitive retail environment and shifting manufacturer strategy. Significantly, the price gap between EVs and ICE vehicles is closing. While EVs were 35% more expensive on average than their petrol counterparts in early 2024, this had dropped to 24% by early 2025, with further reductions expected.

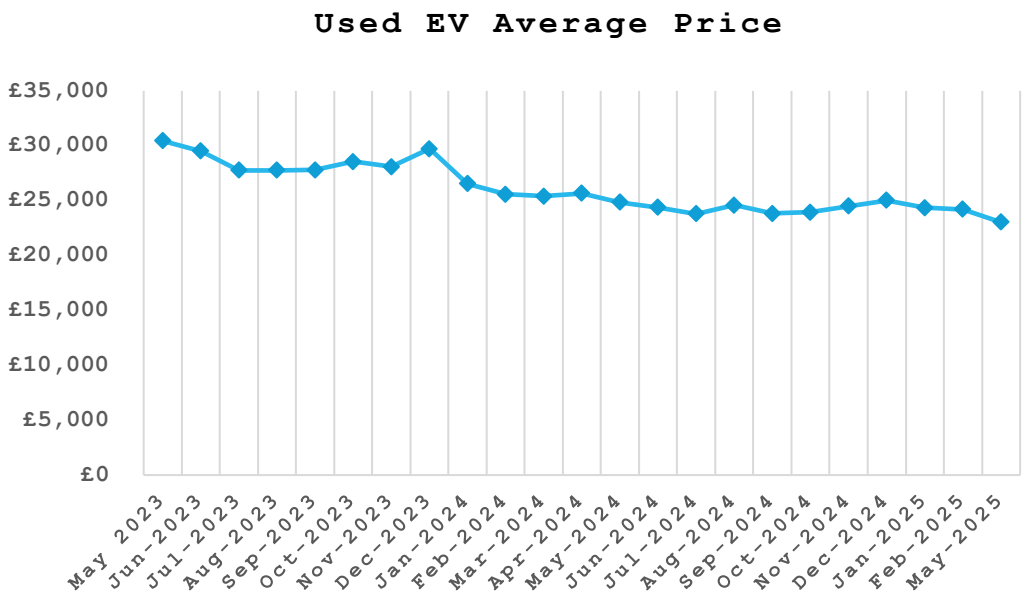
Much of this momentum is powered by plunging battery costs. Lithium-ion battery pack prices dropped 20% in 2024 alone, reaching $115 per kilowatt-hour, a 90% decline from their 2008 value. Goldman Sachs projects a further drop to $80/kWh by 2026, making unsubsidised EVs cost-competitive across most segments. Advances in manufacturing efficiency, such as the development of solid-state batteries, automated production lines, and scale-driven cost optimisation, are accelerating this trend.

Looking ahead, UK EV sales are projected to reach 440,000 units in 2025, with price parity expected by 2026 for small cars and by the end of the decade for larger vehicles. Meanwhile, used EVs are forecast to decline in price by a further 28% by 2030, creating a genuinely affordable second-hand market.

Challenges remain. Chinese entrants like BYD and MG are reshaping price expectations, while new road tax and luxury car charges, effective from April 2025, could impact the appeal of higher-

end EVs. Yet the direction of travel is clear: EVs are becoming not just greener but cheaper. In the end, the market isn't waiting for price parity, it's accelerating toward it.

Do used cars or new cars represent ‘the market’?



The UK car market remains driven by used vehicle sales, with around four out of every five cars sold being second-hand. In 2024, used cars accounted for 79.6% of the market, with over 7.6 million units sold. In contrast, new car sales totalled 1.95 million, representing just 20.4% of all transactions.

This 4:1 ratio has shown remarkable consistency. In 2023, used vehicles accounted for 79.2% of sales, a slight increase from 2024. Early 2025 data suggests the trend is holding steady, with used cars comprising 77.7% of Q1 sales.

The used car sector remains strong, showing continued momentum. In 2024, it grew by 5.5%, recording eight consecutive quarters of growth. Volumes increased by over 400,000 vehicles compared to 2023, with every month seeing a rise in transactions.

By contrast, the new car market posted more modest growth of 2.6% in 2024. This was driven mainly by fleet purchases, up 11.8%, while private registrations declined by 8.7%.

Supply chain disruptions, particularly semiconductor shortages, have constrained new vehicle production in recent years, reinforcing the appeal of the used market. Coupled with ongoing cost-

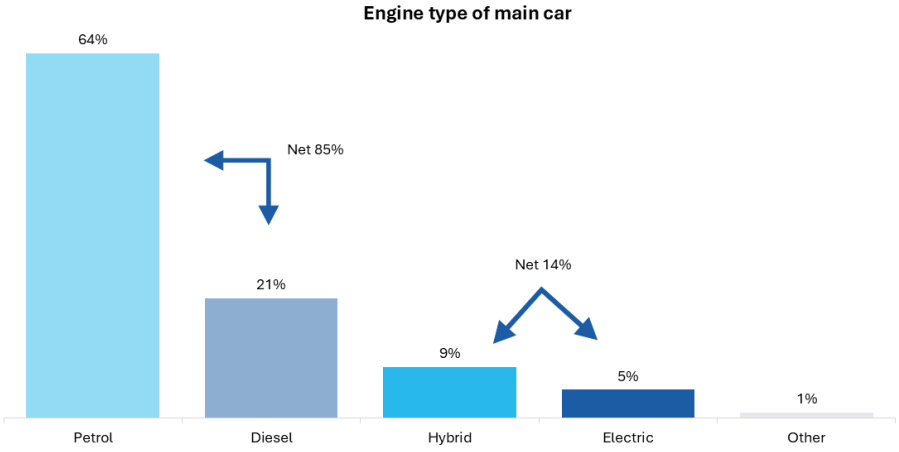
of-living pressures, UK consumers continue to favour the affordability and availability of second-hand cars.

Electric vehicles are gaining traction in both segments. Used EV sales rose 57.4% in 2024, while new EVs made up 19.6% of new car registrations.

Overall, the UK remains one of Europe's most used-car-dependent markets, reflecting deep-rooted economic preferences and structural market maturity.

EV Ownership Remains Marginal Despite Growing Awareness

Electric vehicles account for only 5% percent of the cars in UK, while hybrid has substantially higher share



Engine Types of Main Vehicles (YouGov, 2025)

A stark reality is reinforced here: while the conversation around electric vehicles has accelerated, actual adoption remains slow. Just 5% of UK drivers currently own an electric vehicle, with a further 9% driving hybrids. Petrol and diesel cars continue to dominate UK roads, accounting for a combined 85% of vehicle ownership.

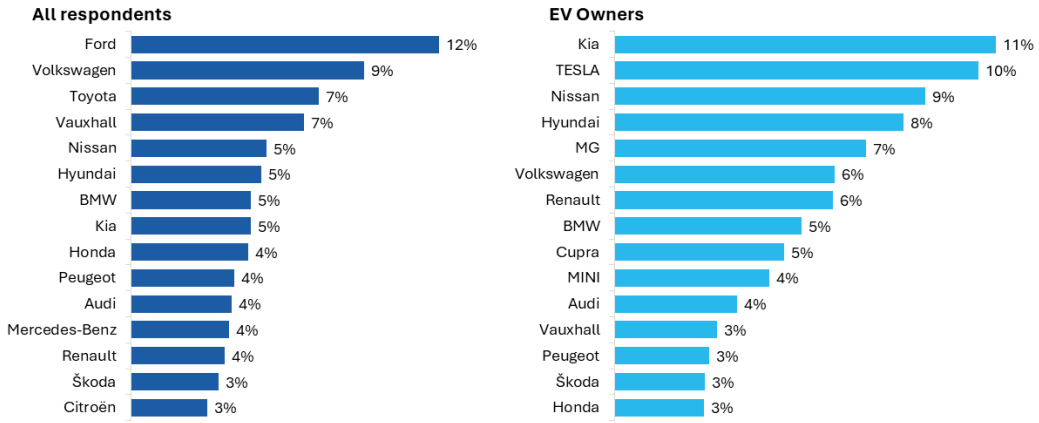
Awareness is not the issue, access is. EV ownership remains a niche market, hindered by affordability concerns, infrastructure gaps, and persistent misconceptions. To shift these numbers meaningfully, we must remove practical barriers and normalise EV use through targeted investment in charging infrastructure, especially for those without driveways.

Encouragingly, this 5% is not a ceiling; it's a starting point. With over 60% of drivers open to considering an EV in the next five years, the challenge isn't convincing people to go electric; it's making it easy for them to do so.

Ford has the highest incidence of ownership, while Kia and Tesla are the most preferred brands among EV Owners.

Legacy Leaders vs EV Favourites

Ford has the highest incidence of ownership, while Kia and Tesla are the most preferred brands among EV Owners.



Mainstream Car Ownership vs. EV Ownership (YouGov, 2025)

There is a striking divergence between mainstream car ownership and preferences among electric vehicle (EV) drivers.

Among all UK drivers, legacy brands dominate: Ford (12%) leads the pack, followed by Volkswagen (9%), Toyota and Vauxhall (both 7%). These results reflect decades of market penetration and brand familiarity.

But among EV owners, the landscape shifts dramatically. Kia (11%) and Tesla (10%) top the list, neither of which appear in the top three among the general population. Nissan, Hyundai, and MG also perform strongly, showing how newer, more EV-focused brands are gaining traction.

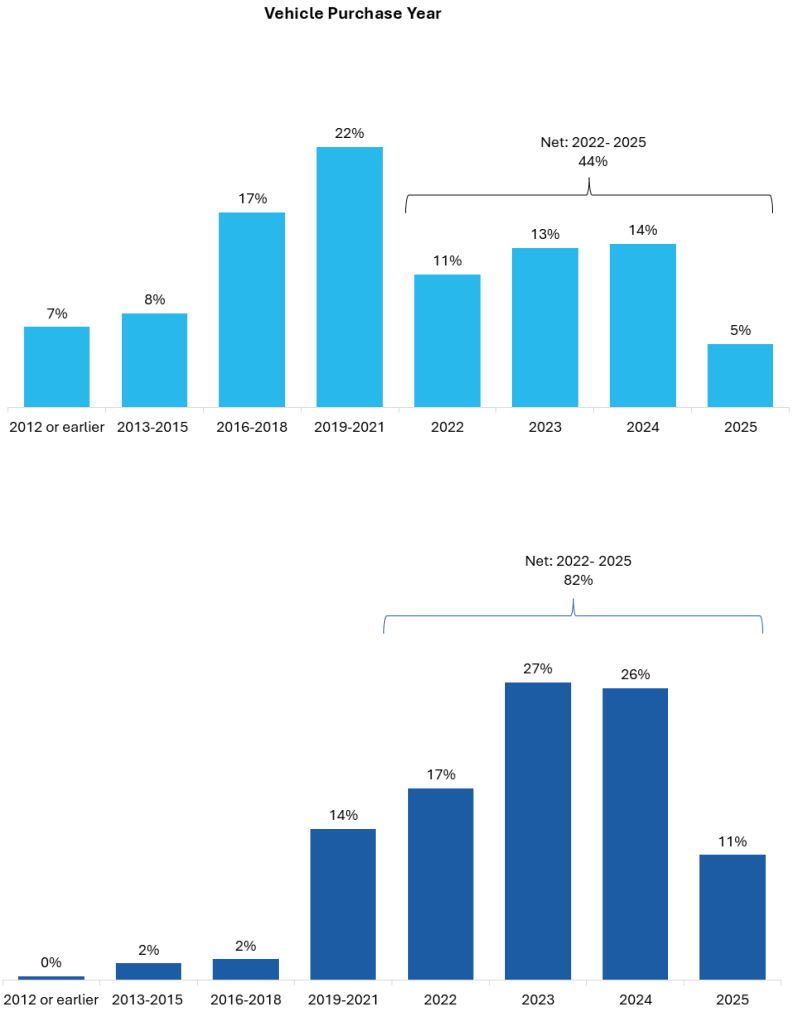
Notably, Tesla, while niche among the wider public, ranks second among EV owners. This signals its outsized influence in shaping perceptions of electric mobility, despite its lower market share overall.

The takeaway? Legacy brand strength does not automatically translate to EV leadership. Consumers are actively reassessing their loyalties when entering the electric market, favouring brands that demonstrate innovation, range confidence, and EV-first thinking.

This brand switch should be a wake-up call to incumbents: in the age of electric, familiarity alone won't cut it. EV credibility must be earned.

EVs Reflect a Newer Buying Cycle

As expected, EV Owners are much more likely to have bought their car in the last few years



Vehicle Purchase Year (YouGov, 2025)

Key behavioural insight is underscored here: EV owners are significantly more likely to have purchased their vehicles recently. While 44% of all respondents bought their current car between 2022 and 2025, that figure jumps to a striking 82% among EV owners.

This is both expected and essential. Electric vehicles are a newer market segment, with rapid technological advances, incentives, and public discourse. As such, EV adoption is largely being driven by recent or upcoming car buyers, not those with older vehicles.

This insight has strategic implications for local authorities and EV providers:

- Focus interventions on households approaching a new car purchase.
- Align messaging with timing triggers (e.g. end of lease, government incentives, or low emission zones).
- Prioritise second-hand EV market growth, as many early adopters begin to trade in.

EV adoption is being led by drivers who are already in motion. The task ahead is to ensure that the necessary infrastructure, incentives, and information are in place before they decide which road to take.

Future Ownership

Interest Is Growing. But So Is Uncertainty.

The future of car ownership in the UK is tilting towards electrification, but the journey is far from straightforward. This section unpacks key trends in consumer expectations, intent, and timing around future vehicle purchases. The findings indicate both a growing demand for EVs and a significant opportunity to influence decisions that are still in formation.

Fossil Fuel Dominance Is Eroding, But Not Yet Replaced

There is a clear downward trajectory for petrol and diesel vehicles. While 64% of drivers currently own a petrol car, only 32% expect their next vehicle to be petrol-powered. Diesel falls from 21% to just 8%. In contrast, hybrids more than double in projected uptake (from 9% to 25%), and EVs climb from 5% to 12%.

Yet the largest single increase is in uncertainty: 23% of respondents don't know what kind of engine their next car will have. This ambiguity signals vulnerability to inertia. Without visible, accessible, and trustworthy charging infrastructure, and the right messaging, many may default to what they know.

Strategic takeaway: the next phase of adoption depends less on persuading ideologically resistant drivers and more on nudging the undecided majority toward the electric option

EV Considerers Are Already Shopping

Among those who say they're considering an EV, **75% plan to buy a car within the next five years**, and **50% expect to do so within two**. That includes **6% currently in the market**, and **15% actively planning a purchase within 6–12 months**.

This is not a future-facing segment. It is a present-tense market.

Implications for stakeholders

Charging access must be delivered visibly, especially in urban, kerbside environments where these buyers live and park.

Communications strategies must target people in active buying cycles, not long-term future prospects.

Local authorities, EV brands, and infrastructure providers have a narrow 12–24 month window to convert intent into adoption.

Timeframes Matter More Than Labels

EV consideration sits at a modest 23% when asked in isolation, but rises to 69% when respondents are asked about a longer time horizon. This dramatic uplift reveals a key behavioural insight: hesitation is mostly logistical, not ideological.

- Short-term considerers (24%) are younger, urban, and already weighing their options.
- Long-term considerers (36%) are cautious but convincible, especially when shown practical, fact-based reassurance.
- Even the 32% who initially say “never” can shift their views when common EV myths are addressed.

The challenge is not lack of interest; it’s timing. Infrastructure, policy, and communication must evolve to meet this curve of latent intent. Future demand is not hypothetical; it’s simply deferred by uncertainty.

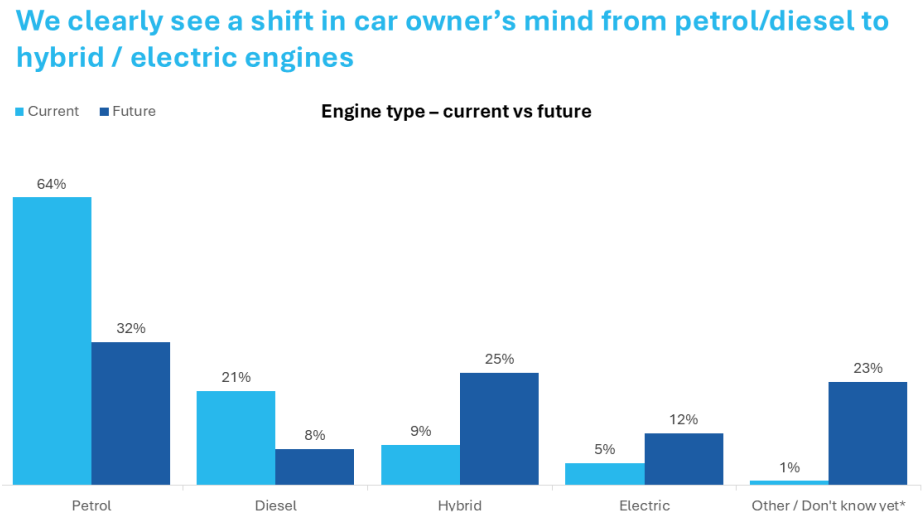
Consumer expectations are evolving, but they are not yet set in stone. The drop in confidence around petrol and diesel is not translating into automatic EV adoption. A significant share of the public is actively researching their next vehicle, but many remain undecided.

To move the market forward, we must:

- Simplify the choice through myth-busting and relatable messaging
- Strengthen the case for EVs as cost-effective, accessible and convenient
- Show up in the right places, particularly through on-street charging in dense residential areas

The UK’s next car market is already taking shape. This report highlights where attention is focused, and where action must follow.

The Future is Electric, But Uncertainty Lingers



Engine Types, Current vs. Future (YouGov, 2025)

It is clear here that there is a decisive shift in consumer intent. While 64% of drivers currently own a petrol vehicle, only 32% expect their next car to be petrol-powered. Diesel fares even worse, dropping from 21% today to just 8% in future consideration.

In contrast, hybrids jump from 9% to 25%, and electric vehicles more than double, rising from 5% today to 12% as a future preference.

The most notable leap, however, is in indecision: 23% of respondents say they don't yet know what type of engine their next vehicle will have. This signals both opportunity and risk:

Opportunity, because nearly a quarter of the market is open to influence, ripe for messaging, incentives, and infrastructure reassurance.

Risk, because uncertainty can lead to inertia. Many may default back to fossil-fuel familiarity if the path to EV adoption remains unclear or inconvenient.

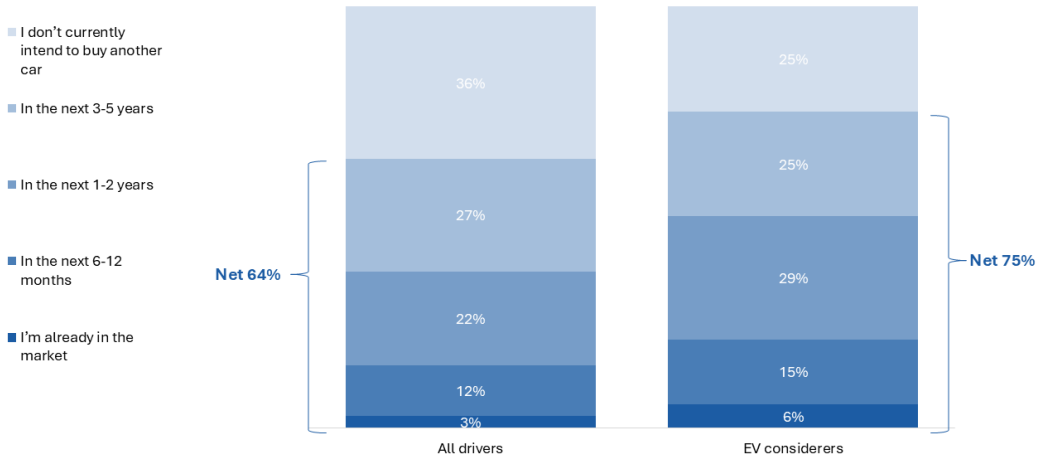
The strategic takeaway? To capitalise on this shift, stakeholders must convert intent into action.

That means:

- Making electric feel familiar
- Making hybrid a stepping stone
- Making infrastructure visible and reliable

- And above all, making the choice feel easy. The shift is underway. Now we must make it stick.

EV considerers are substantially more likely to buy a car within the next five years



Next Vehicle Purchase Time (YouGov, 2025)

EV Considerers Are Actively in the Market, The Window Is Now

There is critical insight for policymakers and marketers alike here: those considering an EV are not just interested, they're imminently in-market.

75% of EV considerers plan to buy a car within the next five years, compared to just 64% of all drivers.

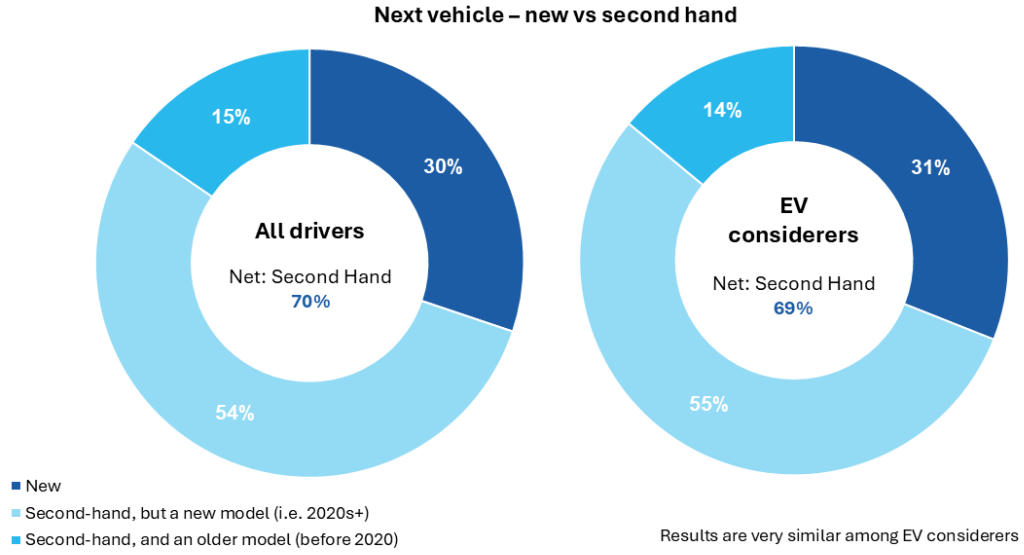
Nearly half of EV considerers (50%) expect to purchase within the next two years, including 6% already in the market, and 15% within the next 6–12 months. This compressed timeline changes the nature of the challenge. It's not just about preparing for future demand; it's about removing friction for people already on the journey.

Implications:

- Public charging infrastructure must become visible where these buyers live and park.
- Communications must target active intenders, not abstract prospects.
- Local authorities and EV brands have a 12–24-month window to shift consideration into conversion.

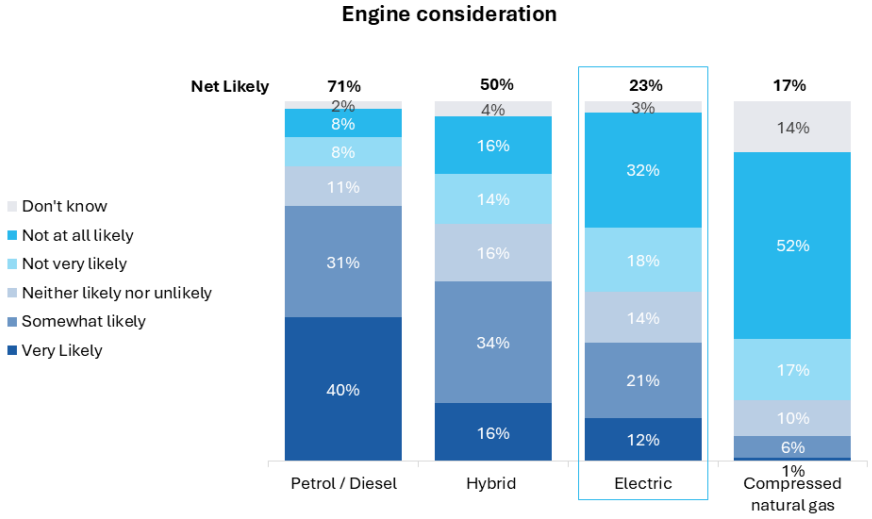
This isn't a slow burn; it's a live opportunity. The next car purchase is already being researched, budgeted, and discussed. If we want it to be electric, the groundwork must be laid today.

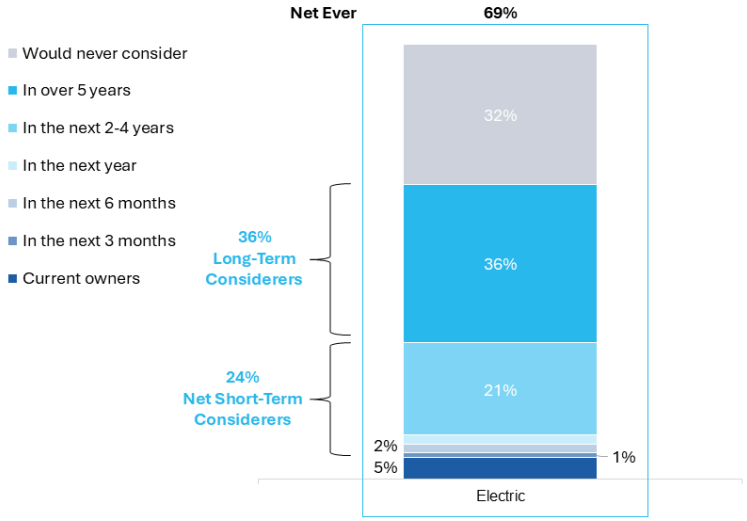
7 in 10 UK drivers expect their next car to be second-hand, while 3 in 10 lean towards a new one



Consideration of the Next Vehicle, New vs. Second Hand (YouGov, 2025)

Consideration for EV stands at 23% but rises to 69% (matching Petrol/Diesel) when respondents refer to specific time frames in the future





Engine Type Considerations (YouGov, 2025)

EV Consideration Is Time-Dependent, and Growing

There is a crucial nuance in the consumer mindset: while only 23% of drivers say they're likely to consider an EV for their next vehicle, that figure nearly triples to 69% when a future time frame is introduced.

This distinction is vital:

- Immediate consideration is cautious, driven by lingering concerns around cost, range, and charging access.
- But longer-term openness is high, with 36% identifying as long-term considerers and 24% as short-term considerers, suggesting a latent wave of potential adopters.

In short, the hesitation isn't ideological, it's logistical.

This data should encourage policymakers, manufacturers, and charge point operators: the demand is there, but our systems and messaging need to catch up with consumer intent.

The 32% who say they would "never consider" an EV are not immovable either, as earlier slides showed, even a small dose of factual correction can shift their position. And among those sitting on the fence, the right message at the right time could be transformative.

The takeaway? Don't just track consideration, understand when it becomes action, and ensure everything from infrastructure to incentives is ready to meet it.

Know who is buying what?

EV Owners and Considerers Profiles

Understanding the People Behind the Numbers

The EV transition is not just technological; it's demographic, psychological, and social. This section examines who owns EVs today, who is likely to consider one tomorrow, and what that means for the market and policy landscape.

A Changing Demographic: From Tech-Forward Males to Urban Young Adopters

Current EV ownership is disproportionately male (66%) and concentrated among drivers aged 45–54 (34%), reflecting a familiar early-adopter profile: affluent, tech-savvy, and financially secure. But the next wave of EV adopters looks markedly different.

- **Short-term considerers** are more gender-balanced (53% men, 47% women), younger (34% aged 18–34), and primarily urban.
- **Long-term considerers** are similarly diverse and slightly older but still skew younger than the general population.
- **Rejecters** are mostly over 55 (66%), more female (52%), and more resistant to change, both in attitude and lifestyle.

Implication: The growth opportunity lies with younger, more diverse segments. Communications, incentives, and infrastructure must evolve to meet this broader demographic, not just the traditional "early adopter" archetype.

Affordability Is the Dividing Line

Socioeconomic status is a clear predictor of EV interest. While 84% of owners and 85% of short-term considerers are from higher-income ABC1 groups, rejecters over-index among C2DE (40%), highlighting a major equity challenge.

- EVs are still perceived as expensive, financially out of reach for many.
- Rejecters aren't necessarily unconvinced, they're often priced out.

Implications for infrastructure and policy:

- Incentivise second-hand EV markets to broaden accessibility.
- Prioritise charging in lower-income, high-density areas.

- Reframe EVs from luxury tech to smart, cost-effective choices.

Electrification must be democratised, not just in ownership, but in infrastructure and messaging.

Urban by Default, But Rural by Necessity

72% of UK drivers are urban, and so are 78% of short-term considerers. But interestingly, 21% of EV owners live in rural areas, higher than the national rural average. This suggests rural adoption is not impossible, just underserved.

- Urban infrastructure remains the priority, particularly for terraced streets without off-street parking.
- But fringe and rural communities shouldn't be overlooked. Visibility in these areas helps normalise EVs beyond the city bubble.

Urban-centric rollout is logical, but inclusion matters. National adoption depends on local relevance everywhere.

Brand Affinity Reveals Buying Intent

Short-term considerers lean toward tech-forward or premium brands like Toyota, Honda, BMW, and Audi. Meanwhile, current owners favour affordability and practicality, Kia (11%), Hyundai (8%), and MG (7%) lead the way.

- Tesla, often seen as the EV benchmark, holds just 1% share, highlighting that aspiration doesn't always translate to purchase.
- Long-term considerers and rejecters show no clear brand pattern, suggesting other barriers (cost, access) take precedence.

Strategic takeaway: EV growth will be driven not by badges, but by confidence, value, availability, and infrastructure.

Timing Is Critical, and So Is the Second-Hand Market

- EV considerers aren't just curious, they're active:
- 74% of short-term considerers expect to buy within two years.
- Most (53–57%) plan to buy second-hand, not new.

Rejecters show little purchase intent but represent a large share of the second-hand market. Bridging this gap is essential.

Recommendations:

- Expand second-hand EV offerings with warranties and financing.
- Engage long-term considerers now to prepare for future conversion.
- Build infrastructure to meet short-term demand before it's missed.

Tech Readiness Predicts EV Openness

- Early adopters are more than twice as likely to own an EV already. However, short-term considerers also display a high affinity for technology (40%).
- Long-term considerers are cautious but not closed.

Rejecters show low tech confidence; messaging should reflect that.

Strategy:

- Lead with innovation for early adopters.
- Offer proof and reassurance for the cautious.
- Focus on simplicity and everyday benefits for sceptics.

Environmental Values Divide Considerers and Rejecters

- Belief in climate change and self-identification as environmentalists correlate strongly with EV ownership.
- 88% of EV owners believe electric is the future of transport.
- 71% cite climate change as a major concern.

Rejecters, by contrast, prioritise cost and convenience, many say they “don’t care” about their carbon footprint.

Messaging must be segmented:

- Values-driven for the conscious consumer.
- Benefit-led for the pragmatist.

Media Habits Shape Messaging Effectiveness

EV owners and considerers are digitally engaged, news apps, websites, and social media are key channels. Rejecters rely more on TV and trust the media less overall.

Channel strategy:

- Use digital to reach current and future adopters.
- Lean on trusted peer voices and community influencers for harder-to-reach groups.
- Avoid one-size-fits-all messaging, tailor tone and channel to audience trust profiles.

Final Thought:

The EV audience is not homogeneous; it is a spectrum of readiness, beliefs, and behaviours. Understanding the profiles of owners and considerers is essential to designing infrastructure, messaging, and policies that meet people where they are and move them where we need to go.

Segment Profiles

Who's Buying, Who's Considering, and What They Need to Say Yes

Electric vehicles aren't just reshaping how we drive; they're revealing who's ready for change and what it takes to bring the rest along. In this section, we move beyond the percentages and into the personas: detailed pen portraits that bring the data to life.

Each profile represents a meaningful slice of the UK driving population. Together, they reveal a path to mass EV adoption, not through blanket messaging or generic policy, but through strategic, segmented engagement.

Current EV Owners- “The Confident Converters”

Profile Summary

Representing just 5% of UK drivers, today’s EV owners are the tip of the spear. They skew higher income (AB), mid-life (average age 49), and more likely to own their home with driveway charging. Well-informed and environmentally motivated, they’re typically data-led in decision-making and digitally engaged. And while their cars are electric, their frustrations with public charging, especially cost, reliability, and availability, remain loud and clear.

Pen Portrait

Think of a 49-year-old marketing director living in a leafy, well-connected suburb. They charge their EV overnight in a private driveway and compare kilowatt-hour costs like others check petrol prices. Always two steps ahead on tech, they made the switch not to save money, but to make a statement, about progress, priorities, and carbon footprints.

They devour data from EV forums and financial columns, but when it comes to motorway service stations, they still wince at unreliable chargers and tap-dance through six different apps. Their expectation? That the charging experience should match the car: seamless, smart, and worth the upgrade.

EV Short-Term Considerers- “The Urban Impatient”

Profile Summary

24% of drivers fall into this camp, ready to switch within 12 months, but dependent on a few key nudges. They skew younger (18–34), live in urban flats or shared housing, and are highly attuned to digital media and climate discourse. They’re often renters, meaning no home charger, but they don’t want a Tesla, just something affordable and clean that works in a city. They respond best to fact-based reassurance, visible infrastructure, and brands that walk the sustainability talk.

Pen Portrait

Picture a 28-year-old creative professional renting in a buzzing inner-city district. She doesn’t own a driveway, but she sees lamp-post chargers on her street and wonders: could this work for me? She’s driven by value and values.

Her TikTok feed is full of cost-of-living hacks and climate explainers, and she’s wary of greenwashing. Charging time matters less than affordability and predictability. If public charging were cheaper and easier, and if incentives lowered the upfront cost, she’d be ready to buy tomorrow.

EV Long-Term Considerers- “The Cautious Calculators”

Profile Summary

36% of UK drivers fall into this slower-but-steady camp. They’re typically 35–49, more financially secure than they are adventurous, and highly pragmatic. Their hesitations are practical: battery life, resale value, charging access. They are open to the idea of EVs, just not yet. These drivers need to see a track record before they leap. Think spreadsheets, not soundbites.

Pen Portrait

Imagine a mid-40s household with two petrol cars, both recently paid off. They’re not anti-EV, they’re just not ready. Every purchase is calculated. They’ve read the reports about battery degradation, compared insurance premiums, and bookmarked three government grant pages.

What’s holding them back? A clear picture of the long-term economics. They want to know the resale value won’t nosedive. They want to see public chargers in town. They’re not dreamers, but they’re not closed off. Once policy and infrastructure catch up with their expectations, they’ll follow.

EV Rejecters- “The Sceptical Traditionalists”

Profile Summary

Comprising 35% of UK drivers, rejecters are mostly aged 55+, often in rural or small-town areas, and tend to sit in lower social grades. They have the least trust in government, media, and emerging technology. Their view of EVs is shaped more by myth than experience, worries about cost, charging, and safety dominate. They are less likely to see climate change as urgent, and more likely to frame objections in terms of lifestyle fit and practicality.

Pen Portrait

Picture someone in their late 50s living outside a market town, driving a decade-old diesel that “still runs like a dream.” They’ve heard about EVs, but mostly from headlines, neighbours, and the occasional sceptical opinion piece. They don’t hate the idea; they just don’t see it working for them. Where would they charge it? How long would it last? What if it breaks?

They remember when diesels were promoted as green, and they’re not ready to trust another government nudge. To change their mind, the case needs to be local, lived, and low-fuss, delivered by someone who’s walked in their shoes, not lectured from a podium.

Strategic Implication

EV adoption isn't a binary, it's a spectrum of readiness, framed by age, income, trust, and access.

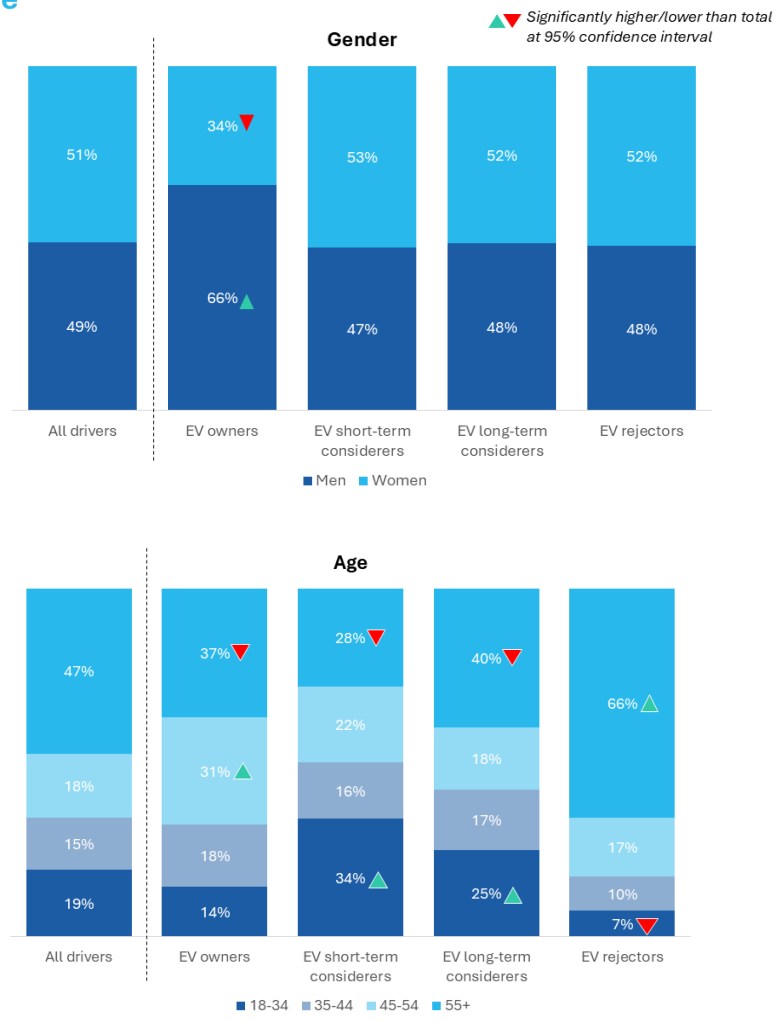
If we want a truly national shift, the solution isn't more marketing. It's more relevance:

- For the owners, fix public charging and support them as influencers
- For the short-term considerers, accelerate on-street rollout and financial support
- For the long-term considerers, deliver proof, protection, and peer stories
- For the rejecters, build visibility, credibility, and community trust

The switch to electric will not be one moment. It will be a thousand micro-decisions, made by people who look very little like one another. Our job is to meet each one of them where they are, and show them that EVs aren't just the future. They're a better now.

The EV Gender and Age Divide, Who's Buying and Who's Considering

Current EV owners are disproportionately male and aged 45–54, whereas 18-34s show greater openness to considering EVs in the near future



EV Short-term vs. Long-term Considerations (YouGov,2025)

We can see the evolving demographic dynamics around EV adoption.

Current EV ownership is skewed male (66%) and concentrated in the 45–54 age bracket (34%), suggesting that early adopters tend to be older, more financially established men, a profile long associated with high-tech and high-investment purchases.

But the future looks different.

EV considerers, especially short-term ones, are younger and more balanced in gender:

- Short-term considerers include more 18–34s (34%) and show an even gender split (53% men, 47% women).
- Long-term considerers still lean younger than average and are evenly split by gender (52% men, 48% women).
- Rejecters, by contrast, are disproportionately older (66% aged 55+) and more female (52%), highlighting a group more resistant to change and potentially more disconnected from emerging tech narratives.

Strategic Insight

This demographic shift is crucial. EV marketing and policy has often spoken to the early adopter, typically male, affluent, and middle-aged. But the growth opportunity lies in a younger, more diverse, and more urban demographic that's open but not yet convinced.

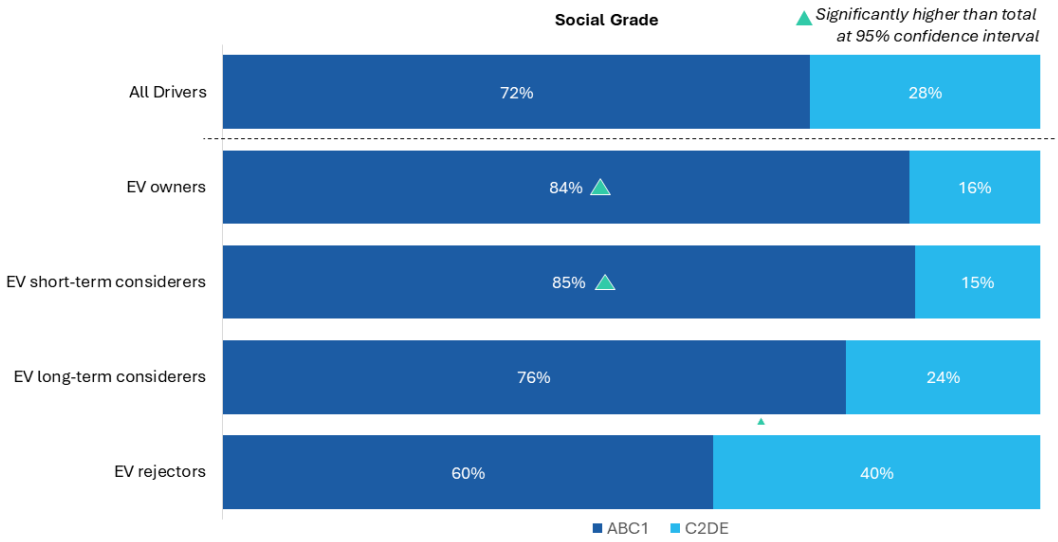
To activate this next wave of adopters:

- Speak in their language, inclusive, practical, and socially driven
- Address their barriers, cost, convenience, and credibility
- Showcase role models, especially women and younger drivers already making the switch

The EV market isn't just evolving, it's diversifying. And our approach must diversify with it.

EV Consideration Tracks Closely with Affluence

There is clear correlation between high social grade and the propensity to own / consider EVs



Social Grade Influence for Considerations of EVs (YouGov,2025)

Here there is a powerful socioeconomic trend: the higher your social grade, the more likely you are to own or consider an EV.

84% of EV owners and 85% of short-term considerers fall into the ABC1 (higher income/professional) category, compared to 72% of all drivers.

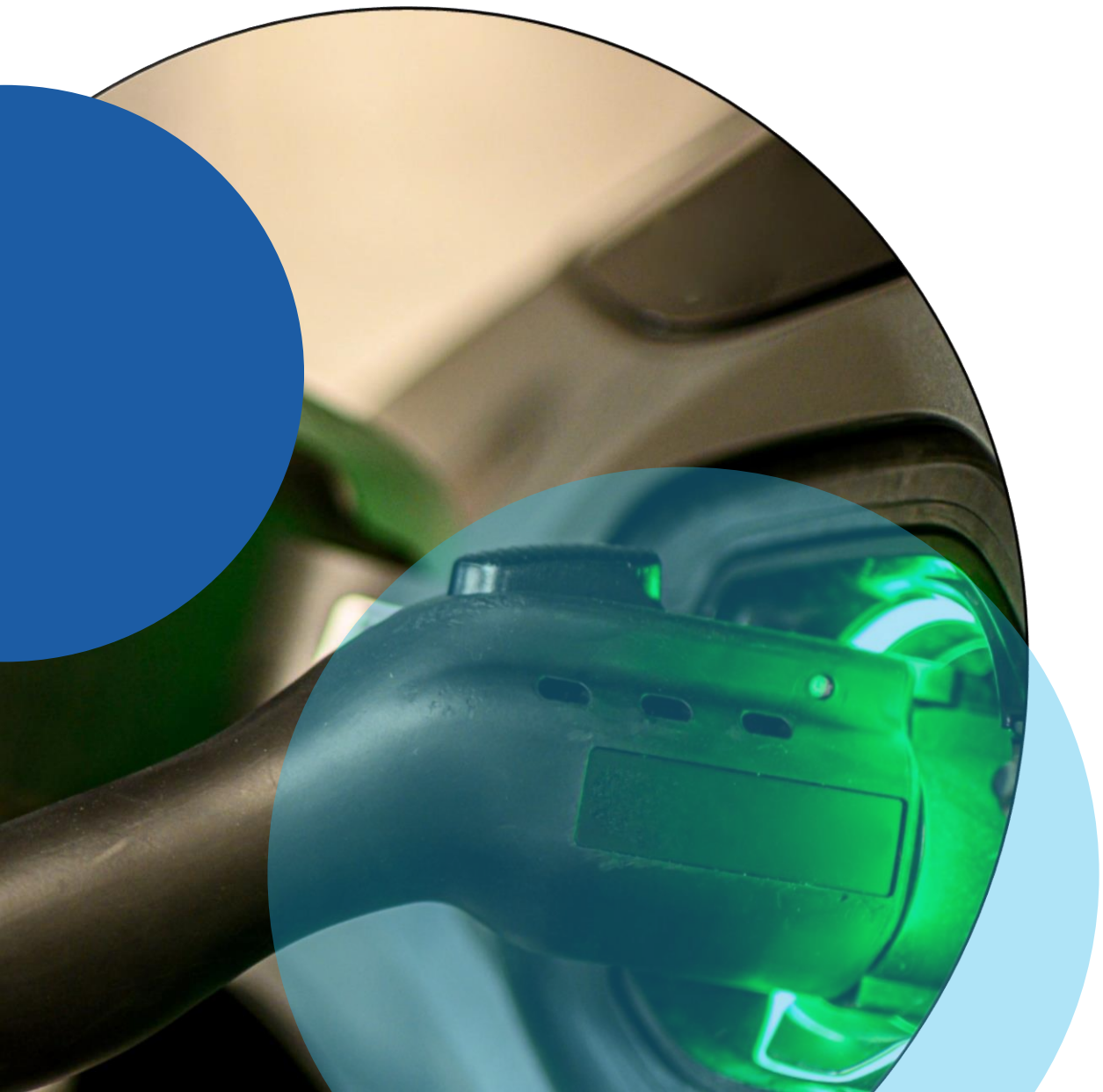
In contrast, 40% of EV rejecters are in the C2DE (lower income/manual) group, significantly higher than the national average.

This signals a fundamental equity challenge at the heart of EV adoption: interest and uptake are strongly shaped by financial headroom. EVs are often viewed as aspirational, attainable to the few, distant to the many.

Implications

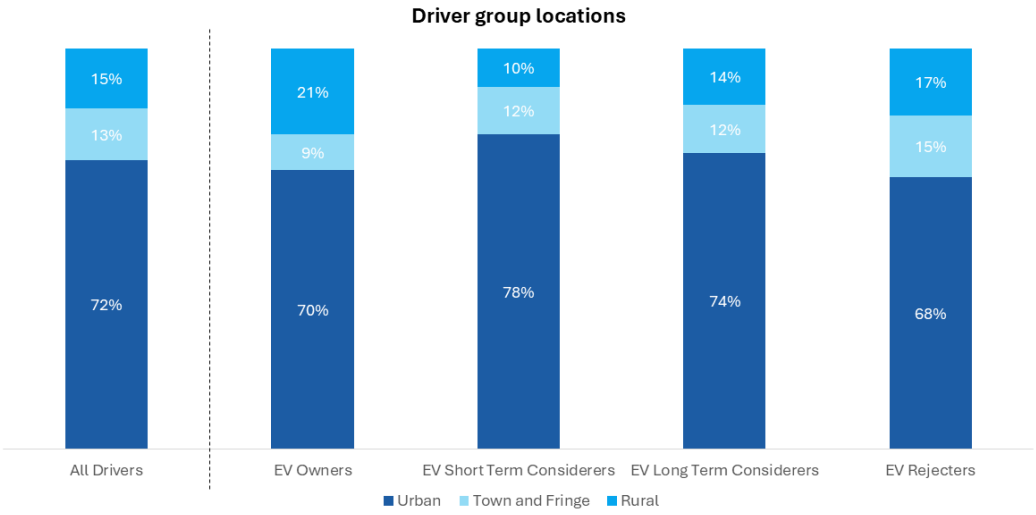
Policy must close the affordability gap: Targeted subsidies, financing options, and incentives for second-hand EVs are vital to ensure the inclusive transition.

- Charging infrastructure should not be class-dependent: On-street charging in lower-income areas is essential to avoid reinforcing a two-tier transport system.
- Messaging should shift from premium to practical: EVs must be reframed not just as future-forward, but cost-efficient and accessible in the here and now.
- Electrification should be a unifying leap forward, not a luxury upgrade. These findings remind us that making EVs mainstream means making them work for everyone.



EV Interest is Largely Urban, But Not Exclusively

Most of the drivers interviewed live in urban areas, with minimal differences across driver groups



Driver Group Locations (YouGov, 2025)

This confirms what many might expect: most UK drivers, across all segments, live in urban areas, and this concentration holds for EV owners, considerers, and rejecters alike.

72% of all drivers are urban dwellers, with 78% of short-term EV considerers and 74% of long-term considerers residing in cities. Even among EV rejecters, a substantial 68% are urban, indicating that reluctance is not confined to rural areas. Interestingly, EV owners are slightly more likely to live in rural locations (21%) than the average driver (15%). This suggests that while infrastructure challenges in rural areas are real, they haven't entirely blocked adoption, especially among higher-income, early-adopter demographics.

Implications

- Urban infrastructure remains the priority, especially for those without driveways or access to home charging.
- But rural demand should not be overlooked: targeting this audience with smart, reliable on-street or hub charging solutions could unlock further adoption.
- Town and fringe communities (12–15%) may offer the best of both worlds, high visibility and manageable roll-out costs.

EV readiness needs to reflect the breadth of the UK population, not just the density. Urban focus makes sense, but inclusion, not exclusion, must guide our infrastructure decisions

EV Brand Ownership Reveals Distinct Preferences, and Market Gaps

Car brand ownership

- EV owners show a heavy skew to Tesla which ranks at the bottom of list
- EV short-term considerers are much more likely to own Toyota, Honda, BMW and Audi.
- EV long-term considerers and EV rejecters are broadly aligned with the all-drivers average.

	All drivers	EV Owners	EV Short-term considerers	EV Long-term considerers	EV Rejecters
Ford	12%	2%	9%	13%	11%
Volkswagen	9%	6%	3%	11%	7%
Toyota	7%	-	12%	7%	8%
Vauxhall	7%	3%	4%	6%	9%
Nissan	5%	9%	2%	5%	5%
Hyundai	5%	8%	5%	5%	4%
BMW	5%	5%	10%	3%	6%
Kia	5%	11%	9%	5%	2%
Honda	4%	3%	11%	4%	5%
Peugeot	4%	3%	3%	4%	4%
Audi	4%	4%	10%	4%	3%
Mercedes-Benz	4%	2%	4%	4%	4%
Renault	4%	6%	0%	4%	2%
Škoda	3%	3%	0%	4%	3%
Citroën	3%	2%	0%	3%	3%
Mazda	2%	0%	2%	3%	2%
MINI	2%	4%	2%	2%	3%
Volvo	2%	-	3%	2%	3%
SEAT	2%	0%	0%	2%	2%
Dacia	2%	-	0%	2%	2%
Fiat	2%	0%	2%	2%	1%
Suzuki	2%	-	0%	1%	3%
Land Rover	1%	-	2%	1%	1%
Lexus	1%	0%	3%	1%	1%
Jaguar	1%	1%	0%	1%	2%
MG	1%	7%	0%	1%	1%
TESLA	1%	10%	0%	0%	0%

Top-5 car brands

Ranking is based on two decimal places.
The table shows the top 27 car brands among all drivers

Car Brand Ownership (YouGov, 2025)

EV owners strongly favour brands like Kia (11%), Hyundai (8%), and MG (7%), while legacy leaders like Ford (2%) and Volkswagen (6%) lag.

Tesla, often viewed as the symbolic face of the EV revolution, surprisingly sits at just 1% ownership among all drivers and 0% among considerers and rejecters, highlighting its niche status in the UK market.

Short-term considerers lean heavily toward premium and tech-friendly brands: Toyota (12%), Honda (11%), BMW (10%), and Audi (10%).

Long-term considerers and rejecters broadly mirror the national brand average, suggesting they're less brand-driven and more barrier-sensitive (e.g. cost, infrastructure).

Strategic Implications

- Mass-market EV growth may depend less on premium appeal and more on affordability, availability, and trust in established nameplates.
- Kia, Hyundai and MG's strong EV foothold reflects their investment in electric-first models at competitive prices.
- Short-term considerers show aspirational intent, which presents an opportunity for brands to capture EV-curious drivers with the right product/incentive mix.

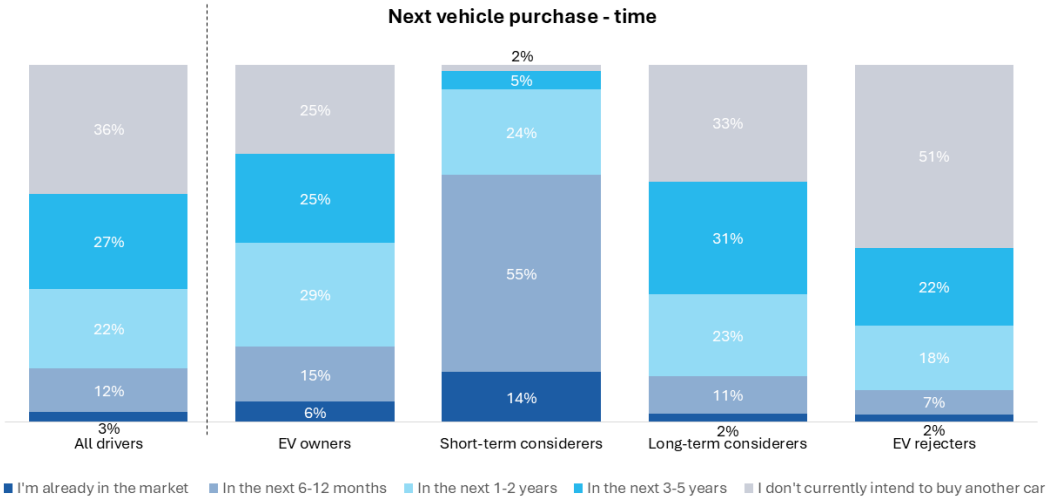
In short: brand choice is a proxy for mindset. If legacy manufacturers want to grow EV share, they must meet drivers where they are, not just on badge appeal, but on value, convenience, and readiness for the electric age.

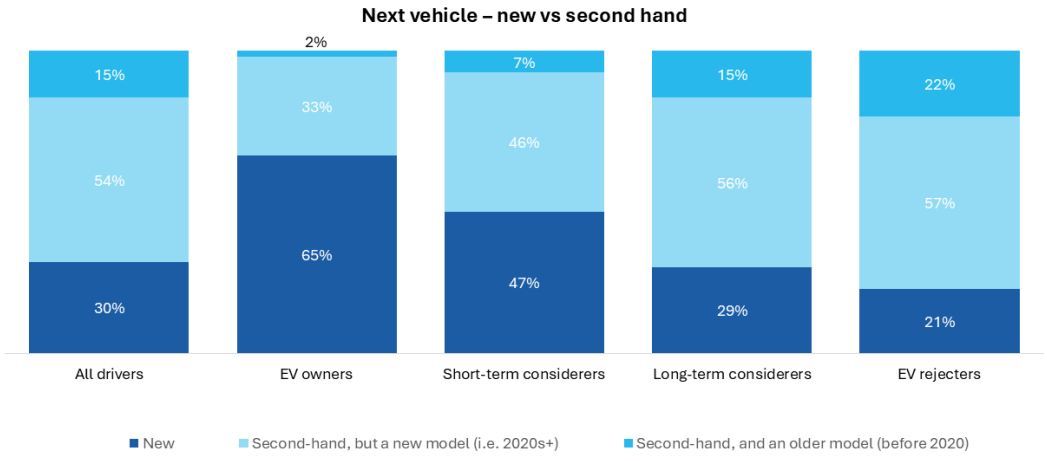
Purchase Timing and Second-Hand Market Hold the Key to EV Uptake

Two critical insights for EV growth are revealed here: when people plan to buy their next car, and whether they're open to second-hand.

Short-term considerers will buy a car by next year, while long-term considerers will do so...

...in 3+ years. A second-hand offer might be useful to win over EV customers among long-term considerers





EV Timing & Buying Intent (YouGov, 2025)

Timing: A Split Market

Short-term considerers are highly active: 74% plan to buy a car within the next two years, with 14% already in the market and 55% planning to buy within 1–2 years.

Long-term considerers are more delayed: Only 36% plan to purchase within two years, while a sizeable 31% are looking at 3–5 years.

EV rejecters are largely inactive: 51% don't currently intend to buy another car.

The implication is that the window to influence short-term considerers is narrow but highly active. Meanwhile, long-term considerers represent a slower-moving but substantial pipeline.

New vs Second-Hand Preference

While 65% of EV owners bought new, most non-owners, especially long-term considerers and rejecters, prefer second-hand models.

56% of long-term considerers and 57% of rejecters want a second-hand vehicle.

Even among short-term considerers, 53% expect to buy second-hand.

Here the implication is that second-hand EV availability and confidence will be pivotal to accelerating mainstream adoption. Addressing fears around battery life, warranties, and resale value is essential.

Strategic Takeaway

To win the next wave of EV buyers:

- Target short-term considerers immediately with offers, reassurance, and visibility.
- Grow the second-hand EV market by de-risking it with guarantees, education, and financing.
- Engage long-term considerers with mythbusting now, so when their purchase window opens, the EV option feels familiar and safe.

Because the future isn't just about new models, it's about unlocking second chances.

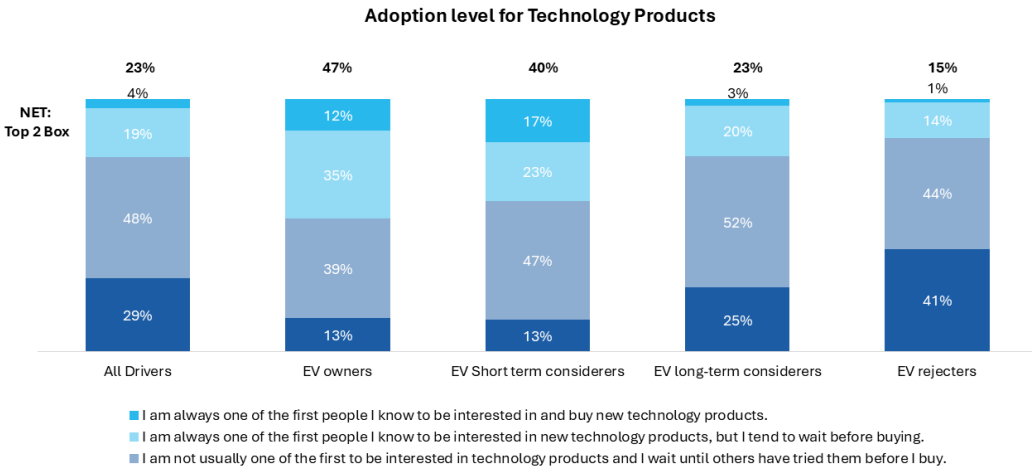
Technology Adoption Is a Key Predictor of EV Interest

There is a clear and compelling link between attitudes to innovation and interest in electric vehicles (EVs).

EV Owners are twice as likely as All Drivers to be interested in adopting new technology.

Long-term considerers tend to behave more cautiously, while Rejectors are the least tech-engaged group.

This highlights a key mindset difference: openness to innovation correlates with EV interest



Innovation Readiness Drives EV Adoption (YouGov, 2025)

Nearly half of EV owners (47%) fall into the top two tiers of tech engagement, people who like to be first or early adopters.

By contrast, only 23% of the general population and just 15% of EV rejecters demonstrate this level of tech openness.

Short-term considerers (40%) show strong early-adopter tendencies, while long-term considerers (23%) are more cautious, preferring to see technology proven before they buy in.

What This Tells Us

EV ownership is as much a mindset as it is a market decision. People open to new ideas and products are significantly more likely to consider, or already own, an EV.

This suggests that effective marketing must go beyond just functional messaging (cost, range, infrastructure) and address psychological readiness.

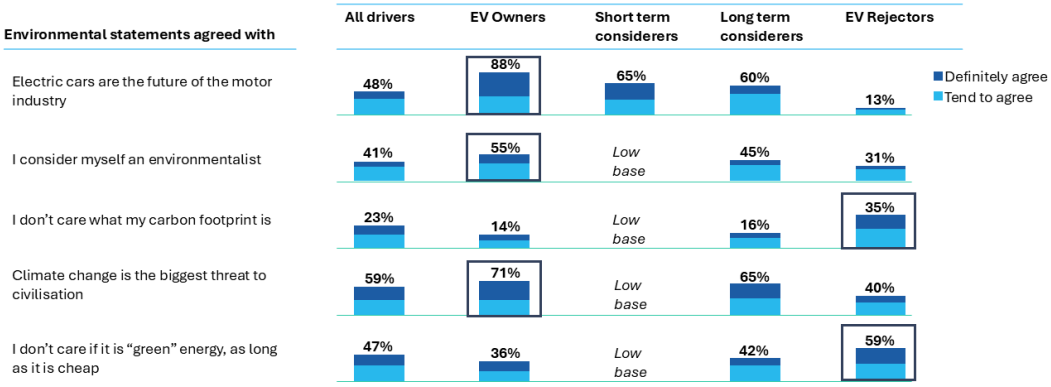
Strategic Insight - To move the dial

- Target early adopters with innovation-led messaging: position EVs as a natural extension of their tech-forward lifestyle.
- Reassure cautious buyers with social proof and myth busting: show that EVs are not just "new", they're reliable, tested, and increasingly mainstream.
- Avoid overcomplicating the message for rejecters. Focus on simple benefits: convenience, savings, and environmental impact.

Openness to technology is not static, it can be nurtured with the right narrative. And when it comes to EVs, that narrative must bridge the emotional gap between new and normal.

Environmental Beliefs Strongly Shape EV Attitudes

EV attitudes reflect broader environmental beliefs - EV owners see EVs as the future and climate change as a threat, while Rejectors are more likely to be dismissive



News Consumption and Media Trust Across EV Segments: EV Owners Prefer Digital, Rejectors Least Trusting (YouGov, 2025)

There is a profound and consistent pattern here: belief in electric vehicles is deeply intertwined with broader environmental values.

This chart reveals a profound and consistent pattern: belief in electric vehicles is deeply intertwined with broader environmental values.

88% of EV owners agree that electric cars are the future of the motor industry, compared to just 13% of EV rejecters, a stark attitudinal divide.

EV owners are also far more likely to identify as environmentalists (55% vs 31% of rejecters) and to view climate change as the biggest threat to civilisation (71% vs 40%).

Conversely, EV rejecters are significantly more likely to express dismissive attitudes, with:

- 35% saying they don't care about their carbon footprint
- 59% prioritising cheap energy over green energy

What This Tells Us

The decision to adopt (or reject) EVs is not just about cost, range, or charging, it's also about values. People who believe in climate change and align with environmental responsibility are much more open to electrification. Those who don't are harder to convince.

Implications

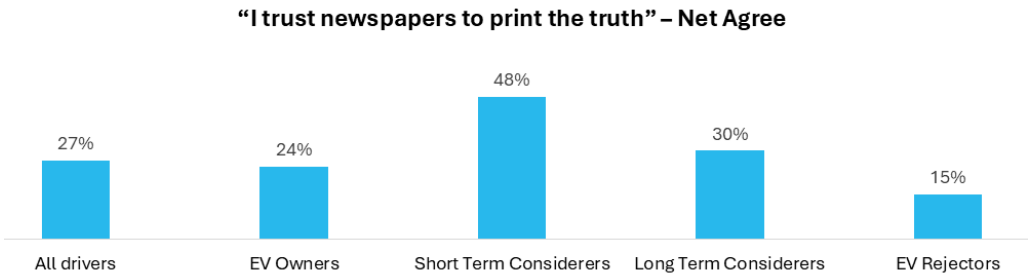
- Values-led messaging is essential for moving long-term considerers, particularly those who already care about sustainability but haven't yet acted.
- For rejecters, arguments about cost savings, convenience, and local air quality may resonate more than climate narratives.
- Policy and communications must segment audiences by mindset and market stage, there is no one-size-fits-all.

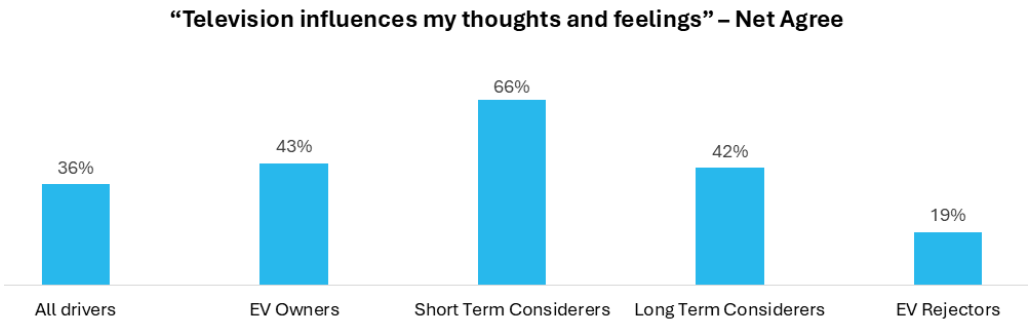
EV adoption follows environmental conviction. If we want the electric transition to accelerate, we need to meet each audience where they are, ideologically and practically.

EV Mindsets Mirror Media Habits, Digital-First and Trust-Selective

TV is the top news source across All Drivers, but EV Owners rely more on digital platforms. Rejectors are the least engaged and least trusting

Top 5 (ranked by All Drivers)				△▽ Significantly higher/lower than total at 95% confidence interval	
Sources of News	All Drivers	EV Owners	Short term Considerers	Long term Considerers	EV Rejectors
TV	65%	61%	66%	64%	68%
News Apps/ Websites	59%	71% ▲	54%	64%	49% ▼
Radio	49%	45%	50%	51%	43%
Social media	37%	38%	56%	41%	27%
Friends/ Family	33%	36%	40%	36%	25%





News Consumption and Media Trust Across EV Segments: EV Owners Prefer Digital, Rejectors Least Trusting (YouGov, 2025)

The charts on the previous page add a critical layer to understanding EV audiences: where they get their information, and whether they trust it.

Sources of News

TV remains dominant across all segments, including 61% of EV owners and 68% of rejecters.

But EV owners diverge sharply by placing much greater emphasis on digital news apps/websites (71%), significantly above the general population (59%).

Short-term considerers are the most socially connected, with 56% using social media and 40% relying on friends/family as news sources.

Rejecters are the least engaged online, scoring lowest for websites (49%) and social media (27%).

Media Influence and Trust

Just 24% of EV owners trust newspapers to "print the truth", while 48% of short-term considerers do, perhaps reflecting younger, more traditional media users in this group.

When it comes to TV influence, 66% of short-term considerers say television shapes their thoughts and feelings, followed by 43% of EV owners.

Rejecters consistently score lowest across all metrics, indicating not only media disengagement but also media distrust.

Strategic Implications

- Target different EV audiences with different channels:
- Use digital platforms and news apps to reach owners and long-term considerers.
- Use TV and social media to influence short-term considerers, who are more emotionally responsive and media-attuned.

Trust is a key barrier for rejecters: they are less likely to believe or act on mainstream narratives. Peer-based messaging, community outreach, or local influencers may be more effective in this context.

EV owners and considerers are curious but sceptical. Communicate with clarity, credibility, and relatability, not corporate gloss.

The EV conversation isn't just about what we say, it's about where and how we say it. Understanding media behaviour is essential to making the message land.

EV Motivations and Perceptions

Perceptions and Motivations Around Electric Vehicles

Bridging the Gap Between Attitude and Adoption

Bridging the Gap Between Attitude and Adoption

The decision to go electric isn't made in a showroom; it's shaped in the mind. This section dissects the mental and emotional roadblocks standing between consideration and conversion, revealing why EV adoption remains an intention more than a behaviour for much of the UK public.

A Perception Gap Divides Owners from the Rest

Current EV owners overwhelmingly see their cars as *practical* (37%) and *futuristic* (23%). Yet among long-term considerers and rejecters, the story is quite different:

- **42% of rejecters** and **31% of long-term considerers** view EVs as *overpriced and unattainable*.
- A further **27% of rejecters** see them as *inconvenient*.
- Only **2% of rejecters** describe EVs as environmentally necessary, underscoring a fundamental values divide.

Strategic Insight

The lived experience of ownership has a dramatic impact on perceptions. The challenge is to bridge the exposure gap, through peer stories, trusted voices, and tangible test-drive opportunities.

Price Dominates, but it's Not Alone

Cost remains the decisive factor for most non-owners:

- **71% of long-term considerers** cite the price of EVs as their top barrier.
- **61%** are concerned about charging range.
- **50%** highlight battery life and longevity.
- **Rejecters** diverge: 45% say *none* of the presented incentives would change their mind, highlighting entrenched resistance.

Strategic Takeaway

To convert considerers, demystify cost with total cost of ownership (TCO) narratives. For rejecters, tackle reliability, ease, and simplicity first, before climate rhetoric.

Financial Incentives Still Move the Needle

Across non-owners, top motivators include:

- More public chargers (**45%**),
- Grants for home charging (**43%**),
- Purchase subsidies (**41%**).

Among **long-term considerers**, those figures rise significantly:

- **55%** for more public chargers,
- **52%** for home grants,
- **51%** for subsidies.

Implications

Well-targeted incentives, especially around access and affordability, can shift the cautious middle. But for rejecters, conventional levers are less effective, signalling a need for deeper behavioural strategies or longer-term engagement.

Concerns Cluster Around Practicality

The top five concerns across non-owners are remarkably consistent:

1. Range anxiety (71%)
2. Purchase price (62%)
3. Battery safety and longevity (62%)
4. Charging availability (60%)
5. Environmental impact of battery production (45%)

Among rejecters, each of these concerns spikes higher than average, with battery safety topping the list at **73%**.

Strategic Recommendation

Frame the EV conversation around *solvable problems*, not abstract benefits. Emphasise range improvements, battery warranties, and increasing charging coverage.

Emotional Barriers Are Subtle but Significant

Practical objections often mask emotional discomfort:

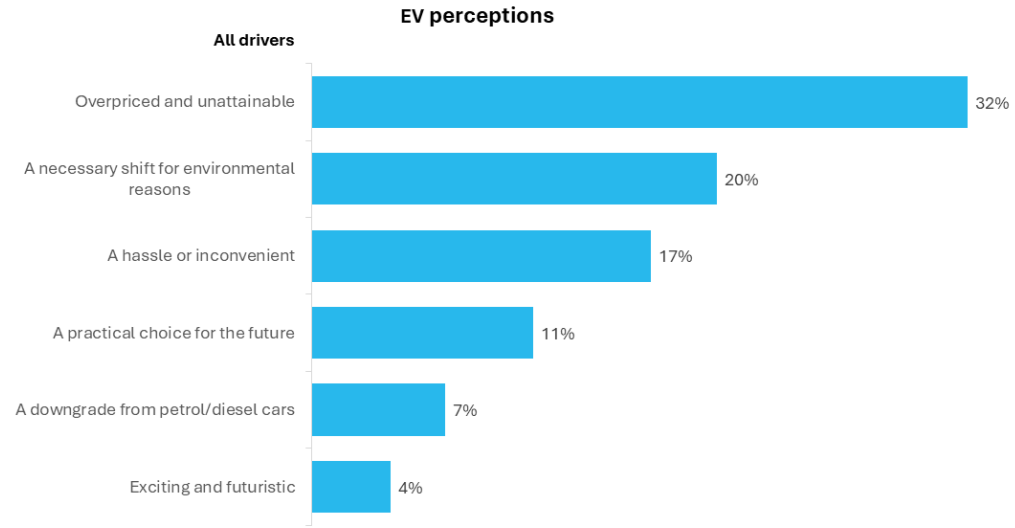
- **49%** cite range anxiety, both rational and emotive.
- **33%** express concerns about reliability.
- **13%** admit to *fear of change*, and
- **17% of rejecters** say EVs "don't fit my lifestyle".

Yet only 6% say they don't know anyone with an EV, showing social exposure is growing even as anxiety lingers.

Addressing EV resistance requires more than facts. It requires *familiarity*. Campaigns should be grounded in everyday stories, local visibility, and lifestyle alignment.

This isn't a knowledge gap, it's a *confidence gap*. EVs are not being rejected for what they are, but for what many imagine them to be. Change that perception, and we change the market.

Long-term considerers and rejecters view EVs as overpriced or inconvenient, highlighting key barriers to broader adoption



EV Owners	EV Short term considerers	EV Long-term considerers	EV Rejecters
1% ▼	16% ▼	31%	42% ▲
27%	37% ▲	28% ▲	2% ▼
3% ▼	3% ▼	13% ▼	27% ▲
37% ▲	23% ▲	12%	3% ▼
3%	4%	3% ▼	13% ▲
23% ▲	7%	3%	0% ▼

▲▼ Significantly higher/lower than total at 95% confidence interval

EV Perceptions (YouGov, 2025)

Cost and Convenience Concerns Dominate EV Resistance

This brings to light the most persistent mental blocks to broader EV adoption, especially among long-term considerers and rejecters.

42% of EV rejecters and 31% of long-term considerers view EVs as “overpriced and unattainable”, compared to just 1% of current EV owners.

27% of rejecters also believe EVs are a hassle or inconvenient, while 13% of long-term considerers feel the same, much higher than among owners or short-term considerers.

Only 2% of rejecters see EVs as “a necessary shift for environmental reasons,” highlighting fundamental values divide.

Meanwhile, EV owners are far more likely to describe EVs as “practical” (37%) and “exciting and futuristic” (23%), indicating that firsthand experience flips perception from scepticism to satisfaction.

Key Insight

Perception gaps reflect lived experience and levels of exposure. Those who’ve made the switch see EVs as positive, forward-looking choices. Those who haven’t often see them as expensive, inconvenient, or even regressive.

Strategic Response

Address perceived barriers with evidence and empathy, not just optimism. Focus on total cost of ownership, tax savings, and simplified charging experiences.

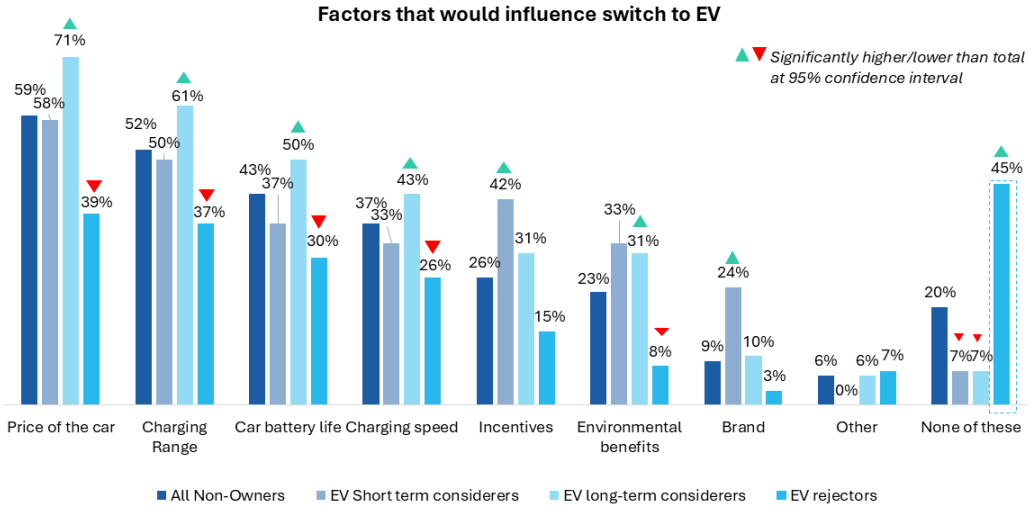
Use testimonials and case studies from satisfied owners, especially those in similar income, age, or lifestyle groups as long-term considerers.

For rejecters, pivot away from climate arguments and focus on practical benefits, like reliability, lower running costs, and local air quality.

Ultimately, the narrative shift must match the audience. Because if perceptions can move this far apart, they can also be brought closer together, with the right message, at the right time.

Cost Is King, But Other Factors Matter Too

This is reflected in the factors influencing a switch to EVs, with price being the most common especially for long-term considerers



Factors that would influence switch to EV (YouGov, 2025)

This lays bare what drives, and what blocks, a switch to electric vehicles: price, range, and reliability are the top priorities for most non-owners, especially long-term considerers.

Top Influencing Factors

Price of the car leads for all groups, but especially for long-term considerers (71%), showing just how cost-sensitive this segment is.

Charging range (61%) and battery life (50%) are also high on their list, key confidence barriers for those yet to switch.

Short-term considerers place a higher emphasis on charging speed (43%) and environmental benefits (33%), reflecting a more engaged and informed profile.

Rejecters, by contrast, are outliers: 45% say “none of these” would influence their decision, a stark reminder of entrenched resistance.

Lower Influence Factors

Brand matters to only a small minority (10% or less) across the board, suggesting that function and finance still outweigh emotional or status-based motives when it comes to EVs.

Strategic Takeaway

Address price perception head-on: While EVs may have a lower total cost of ownership, the sticker price remains a psychological hurdle.

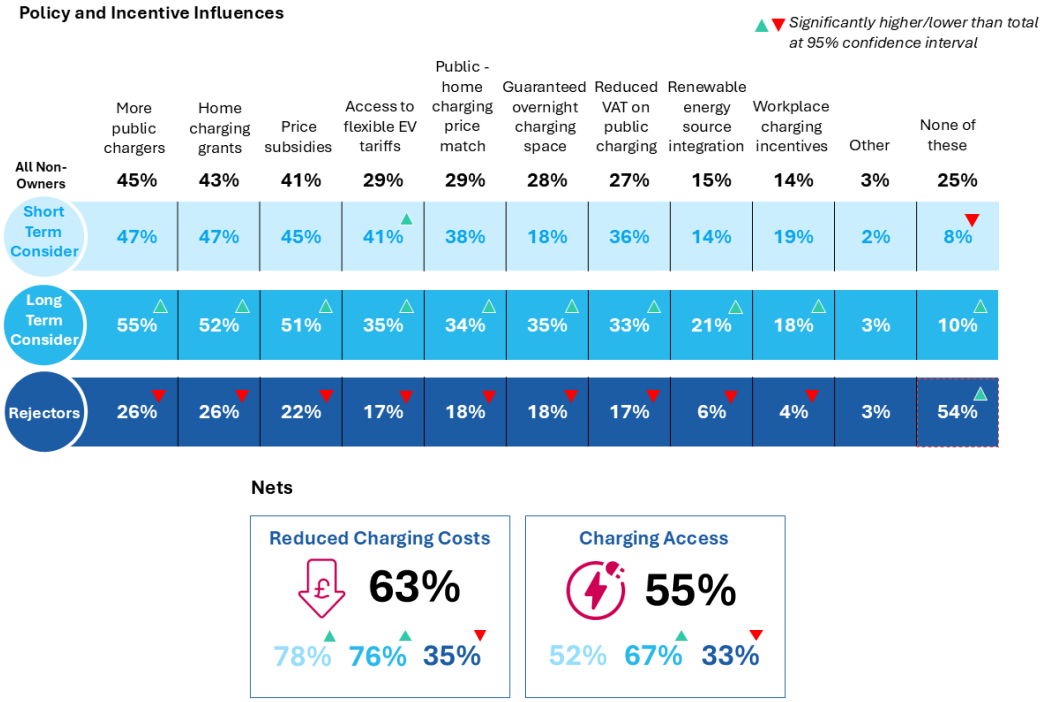
De-risk battery and range concerns with warranties, testimonials, and myth busting.

Double down on environmental messaging for short-term considerers, but shift to practical, financial benefits for long-term considerers and rejecters.

In short: the road to EV adoption isn't blocked, it's gated by practical objections. Tackle them with clarity, and more drivers will be ready to take the wheel.

Incentives Work, Especially When They Cut Costs or Expand Access

More public chargers, home charging grants and price subsidies are top switching incentives. Long-term considerers are most likely to be influenced



Policy and Incentive Influences (YouGov, 2025)

This confirms what many in the industry suspect: policy and financial incentives have a significant impact on EV consideration, particularly among those not yet in the market.

Top Switching Triggers for All Non-Owners:

- More public chargers (45%)
- Home charging grants (43%)
- Price subsidies (41%)

But the impact intensifies dramatically among long-term considerers, who are especially influenced by:

- More public chargers (55%)
- Home charging grants (52%)
- Price subsidies (51%)

Flexible EV tariffs, overnight charging options, and VAT reduction on public charging.

In contrast, rejecters are far less responsive across the board, with only 35% influenced by reduced charging costs and a mere 33% by charging access.

The right-hand panel shows that:

- 78% of short-term considerers and 76% of long-term considerers would be motivated by reduced charging costs
- 67% of long-term considerers would also be swayed by improved access to charging

Strategic Implications

- Financial levers still matter: Cost-based incentives remain the most powerful tool to unlock EV adoption, especially for the cautious middle (long-term considerers).
- Charging access is nearly as important, especially for those without driveways or in urban settings.
- Rejecters remain difficult to move with standard incentives. More radical or personalised interventions, or life-stage changes, may be required.

Affordable charging is the number one adoption trigger: nearly two-thirds (63%) of non-owners say reduced charging costs would persuade them to switch, rising to 78% among short-term considerers and 76% among long-term considerers.

Range, Price, and Battery Safety Dominate EV Concerns, Especially Among Rejecters

Range and price are top concerns for all non-owners. Rejectors are more concerned generally, particularly on battery safety and range

▲▼ *Significantly higher/lower than total at 95% confidence interval*

Concerns about EVs	All Non-Owners	EV Short-term considerers	EV Long-term considerers	EV Rejecters
The range I can drive without a charge	71%	48%▼	71%	75%
Vehicle purchase price	62%	40%▼	61%	69%▲
Battery safety and longevity	62%	52%	57%▼	73%▲
Number and proximity of charging stations	60%	37%▼	59%	66%▲
Environmental impact of battery production	45%	24%▼	42%▼	55%▲
Repair / maintenance cost	44%	25%▼	39%▼	56%▲
Longevity of the vehicle, Longevity of the vehicle	37%	14%▼	34%	47%▲
No capability / space to charge at home	37%	16%▼	35%	43%▲
Higher insurance costs	29%	10%▼	25%▼	40%▲
Stalls during cold weather	17%	14%	15%	20%
Vehicle performance	16%	12%	14%▼	21%▲
Limited models	10%	9%	11%	10%
Higher risk of accidents	10%	11%	6%▼	16%▲
Vehicle design	8%	15%	5%▼	13%▲
I don't have any concerns about electric vehicles	3%	5%	4%	1%

Concerns about EVs (YouGov, 2025)

A hierarchy of hesitation is revealed among those who haven't yet made the switch to electric.

Top 5 Concerns Across All Non-Owners

1. Range anxiety (71%)
2. Vehicle purchase price (62%)
3. Battery safety and longevity (62%)
4. Availability of charging stations (60%)
5. Environmental impact of battery production (45%)

These concerns are even more pronounced among EV rejecters, who are significantly more likely than average to worry about

1. Battery safety and longevity (73%)
2. Range (75%)
3. Charging station availability (66%)
4. Purchase price (69%)
5. Home charging access (43%)

By contrast, short-term considerers express lower levels of concern across nearly every metric, with their most significant issues being battery safety and range, but still well below the levels seen among rejecters.

Strategic Insight

This data underscores that practical, not emotional, concerns are the main barriers to adoption:

- Range, cost, and reliability are solvable problems, with the right messaging, infrastructure, and financial support.
- Rejecters are less influenced by aspiration and more by fear, meaning interventions must focus on reassurance, not evangelism.
- Short-term considerers are more confident and open, suggesting they're ripe for targeted engagement and conversion.

Recommendation

Reframe the EV story from “future promise” to practical confidence:

“You can go farther than you think.”

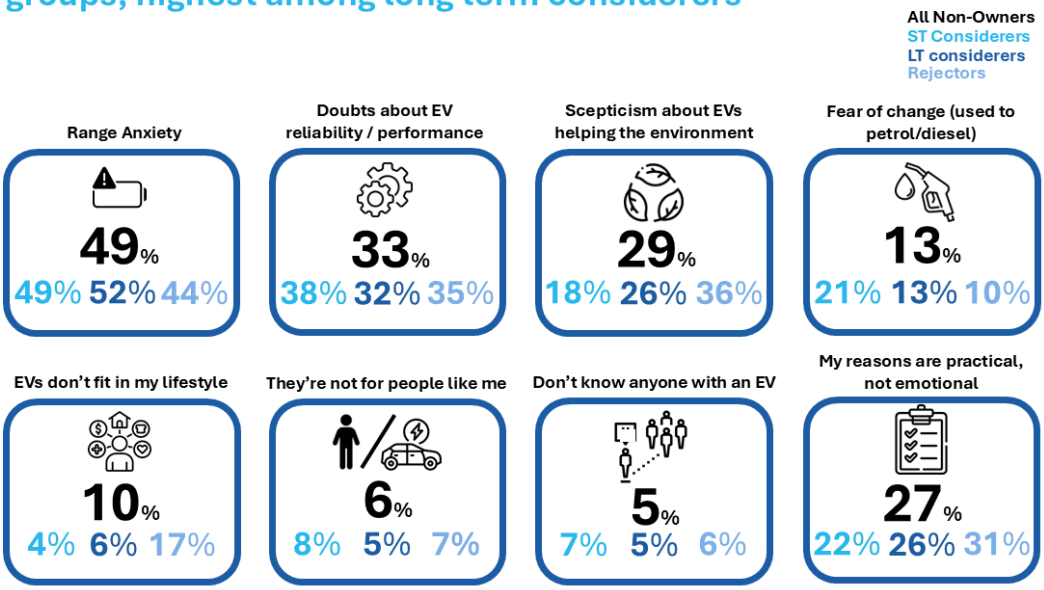
“Battery issues are rare, and covered.”

“Public chargers are closer than you realise.”

The more grounded and fact-based the approach, the faster we move hesitant drivers from fear to first-hand experience.

Beyond Cost and Range, The Emotional Landscape of EV Hesitation

As with general concerns, range anxiety is the top barrier for all groups, highest among long term considerers



Concerns about EVs (YouGov, 2025)

This dives into the emotional and attitudinal barriers preventing non-owners from switching to EVs. It reveals that range anxiety (49%) is still the leading concern, but underneath that are deep-seated issues of trust, identity, and social influence.

Key Emotional Barriers:

- Range Anxiety remains the top barrier across all groups, peaking at 52% among long-term considerers.
- Doubts about reliability (33%) and scepticism about environmental benefits (29%) are significant, especially among rejecters (35% and 36%, respectively).
- Fear of change (13%) is under-acknowledged, yet real, especially for those used to petrol/diesel driving habits.
- Interestingly, only 6% say they don't know anyone with an EV, suggesting social exposure to EVs is increasing, even if attitudes lag behind.

Group Differences

- Rejecters are far more likely to say “EVs don’t fit my lifestyle” (17%) and to claim their reasons are “practical, not emotional” (31%), even when emotional bias is evident.
- Short-term considerers are the least emotionally resistant, scoring lower across almost every metric.

Strategic Implications

- Practical messaging must be matched with emotional reassurance. Fear of the unknown, loss of control, or concerns about social identity can’t be solved with data alone.
- Peer influence matters: Testimonials, visibility in local communities, and stories from “people like me” help bridge the confidence gap.
- Trust and familiarity are the antidote to anxiety: The more people see, touch, or talk about EVs, the less they fear the switch.
- In short: the EV challenge is not just technological, it’s psychological. And overcoming that means treating emotional objections with as much attention as practical ones.

Changing Behaviours and Perceptions

Charging Habits, Infrastructure Gaps, and the Price of Inconvenience

Understanding where, when, and how people charge their vehicles is crucial to bridging the gap between EV interest and adoption. This section sheds light on the realities of current charging behaviours and the misalignments in infrastructure planning that threaten progress.

Home Charging Dominates, But That's a Problem

EV ownership is built on one foundational assumption:

- Access to home charging. And for most current owners, that holds true.
- 90% of owners park at home, with 93% using a private charger.
- Only 26% ever use public chargers, and just 10% do so weekly.
- 74% charge overnight, suggesting a passive, low-effort behaviour embedded in daily routine.

Strategic Insight

EV ownership is currently optimised for people with driveways. The risk? If we don't widen access to include those without, EV growth will hit a ceiling defined not by interest, but by postcode.

Public Charging Is the Weakest Link in the Experience

While EVs themselves are rarely the issue, their supporting infrastructure is another story:

- **88%** of owners report frustrations with public charging.
- Top complaints: high cost (**61%**), availability (**40%**), and reliability (**38%**).
- Only **11%** of owners have no issues at all, suggesting the network remains immature, inconsistent, and unintuitive.

Recommendation

Parity with home charging on cost, visibility, and ease of use must become the benchmark. If public charging is treated as a fallback, not a feature, adoption will remain lopsided.

Price Is the Tipping Point for On-Street Charging

- Cost, more than convenience or location, determines whether people will use on-street chargers:
- **46%** of non-users say they would adopt on-street charging if it were cheaper.
- Other upgrades like reliability (**29%**) and location (**21–25%**) rank much lower.

Implication

This isn't a product-market fit issue; it's a price-point failure. Fix that, and on-street usage could jump by 20–40%, especially in urban areas with no driveway access.

Non-Owners Are Watching On-Street Infrastructure Closely

Potential buyers are clear about what would shift their intent:

- **69%** of short-term and **53%** of long-term considerers say cheaper on-street charging would increase their likelihood to switch.
- **70%** also call for more chargers and improved speed/reliability.
- EV rejecters remain unmoved (10–15% responsiveness), highlighting a segment largely insulated from infrastructure interventions.

Strategic Opportunity

Investing in better on-street infrastructure doesn't just build capacity, it builds confidence. And it targets the audiences most likely to make a purchase in the next 12–24 months.

Home Charging Access Is the Silent Deal-Breaker

Access to a charger at home, or the lack of it, is a dividing line between interest and indifference:

- **72%** of rejecters say they don't know where they would charge an EV.
- By contrast, **80%** of short-term considerers and **63%** of owners have a driveway or similar access.
- Just **25%** of rejecters have that same infrastructure option.

Policy Imperative

This isn't just an infrastructure planning issue; it's a psychological one. People don't consider what they can't visualise. Until more urban, shared, or public options are in place, we're asking many would-be EV drivers to make a leap without a landing.

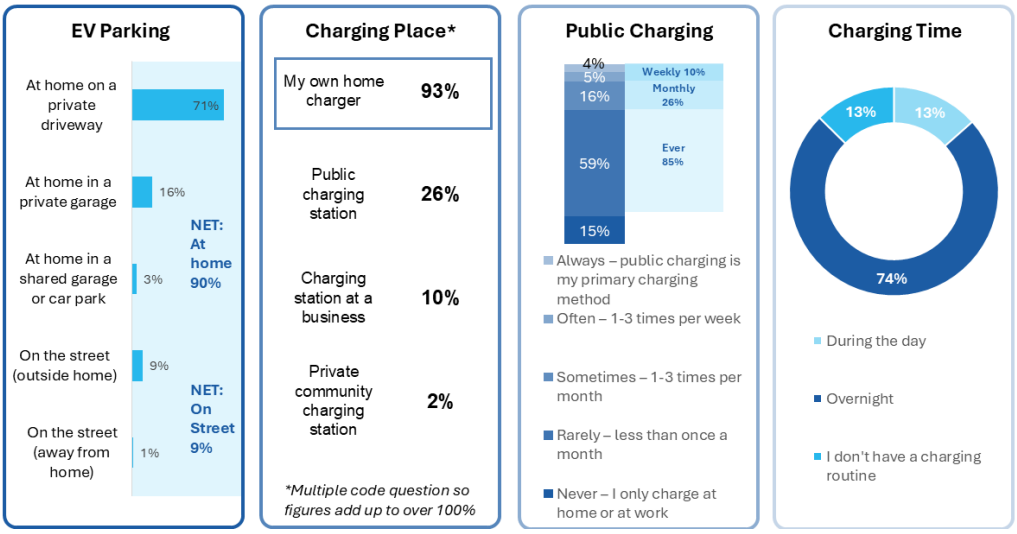
Behaviour follows design. Currently, our infrastructure is designed for a subset of drivers, specifically those with private parking, sufficient financial resources, and high confidence. If we want to turn national interest into mass adoption, public charging must become not only available but also *viable*. The opportunity is enormous, but only if charging becomes as easy, affordable, and automatic as the vehicles themselves.

char.gy

September 2025

Home Charging Dominates, Public Use is Rare and Irregular

Most EV owners park their car at home and use their own home charger – with just a quarter relying on public charging at least monthly



EV Charging Behaviour: Predominant Home Charging, Minimal Dependence on Public Infrastructure (YouGov, 2025)

This reinforces a key insight about the real-world habits of EV owners: charging happens at home, and public infrastructure remains secondary.

EV Parking and Charging Location

- 90% of EV owners park at home, with 71% on a private driveway and 16% in a garage.
- Unsurprisingly, 93% use their own home charger, making it the overwhelmingly dominant charging method.
- Just 26% ever use public charging stations, and only a fraction rely on them regularly (10% weekly, 26% monthly).

Public Charging Frequency

- Only 15% use public charging more than once a month.
- 59% say they rarely use it, and a full 16% say they never use public charging at all, highlighting its minimal role in daily EV life for most current owners.

Charging Time

- Most charging is done overnight (74%), suggesting a passive, convenient behaviour that aligns with home-based routines.
- Only 13% charge during the day, while another 13% report no fixed routine.

Strategic Implications

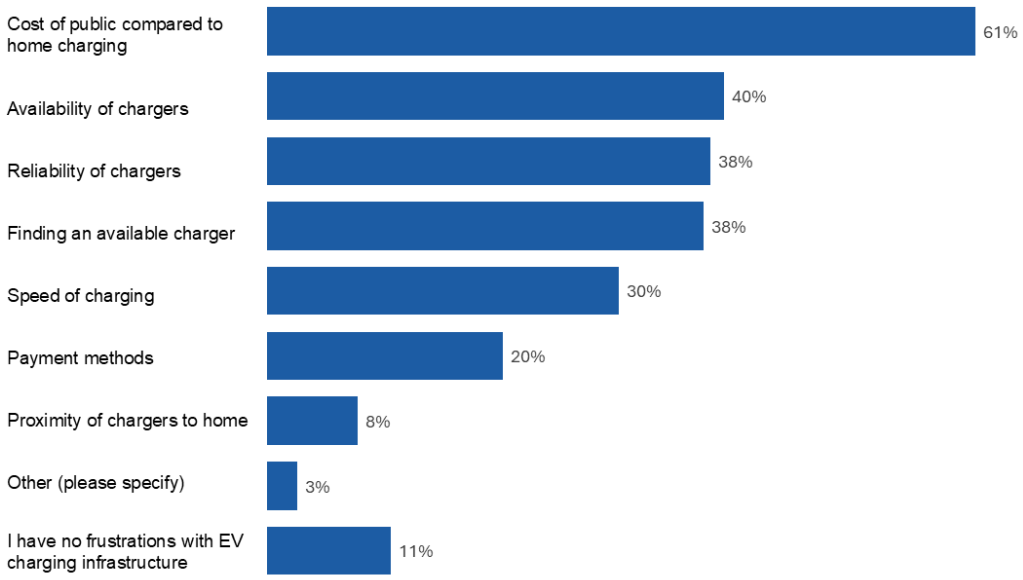
- Public infrastructure should not be built on the assumption of daily dependency, but rather to support those without access to home charging, such as urban residents and renters.
- Home charging access remains a critical equity issue. The fact that so many rely on it reinforces how much harder EV adoption becomes for the 9% who park on the street or the 1% away from home.
- Policy should focus on unlocking home and near-home charging for the many, while public chargers should prioritise reliability, affordability, and accessibility for those who depend on them occasionally, but critically.

For current EV owners, charging is a background activity, not a barrier. The challenge is making that experience possible for everyone else.

Public Charging Frustrations Undermine the EV Experience

Almost 9 in 10 EV owners have frustrations with charging infrastructure, as increased costs of public charging compared to home charging ranks as the most common frustration

Charging Frustrations Among Owners



Charging Frustrations Amongst EV Owners (YouGov, 2025)

There is a pressing truth here: while EV owners are largely satisfied with their vehicles, nearly 9 in 10 report frustrations with the charging infrastructure.

Top Pain Points

- 61% are frustrated by the cost of public charging compared to home, the most common issue by far. This confirms that the perceived affordability of EVs collapses when reliant on external infrastructure.
- 40% cite the availability of chargers, while 38% point to both reliability and difficulty finding an available charger, a triad of access issues.

- Speed of charging (30%) and payment methods (20%) follow, showing that even when chargers are available, usability and user experience matter.
- Only 11% of owners say they have no frustrations at all, which underscores that the EV product may be mature, but the infrastructure isn't.

Strategic Implications

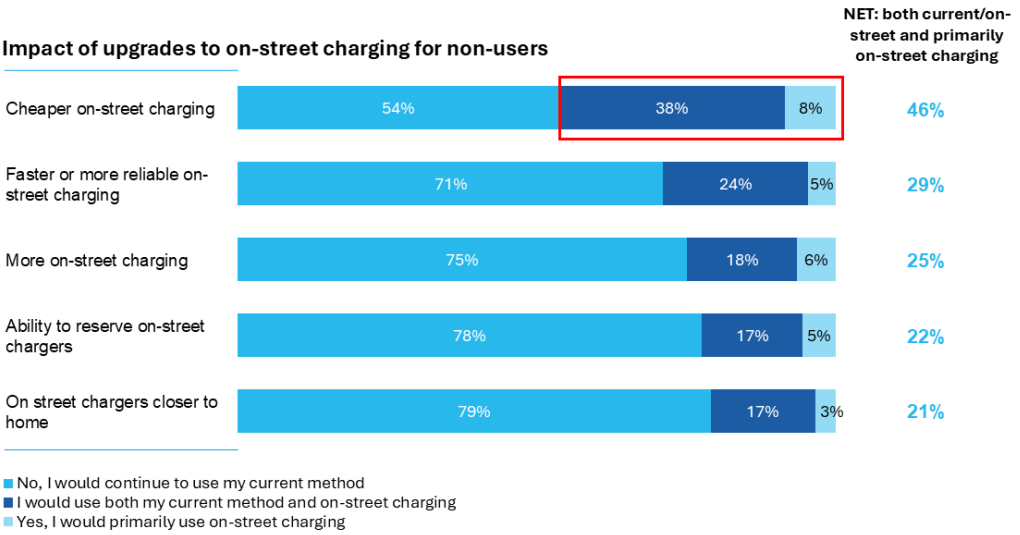
- Parity pricing between home and public charging should be a priority, especially for urban dwellers and renters who can't install chargers at home.
- Charger visibility, uptime, and availability need to become KPIs, not just install counts.
- Payment needs to be frictionless, tap, charge, go, not app maze or card roulette.
- And speed must be communicated clearly, to set expectations and minimise anxiety at the point of use.

The verdict? The car is electric. But if the charger experience isn't, it's holding the entire EV proposition back

Price is the Pivot

And among EV owners who don't use it, almost half would start using on-street charging if it was cheaper...

...indicating a key barrier of using on-street charging for EV owners



Charging Frustrations Amongst EV Owners (YouGov, 2025)

This highlights a key unlock for public infrastructure usage: cost parity with home charging.

Among EV owners who currently don't use on-street charging

- 46% say they would start using it if it were cheaper, either as their primary method or in combination with home/work charging.
- Other upgrades (reliability, availability, reservability, proximity) also drive consideration, but with significantly less impact:
- 29% for faster/reliable charging
- 25% for more on-street locations
- Just 21% for chargers closer to home

In every case, the majority of current non-users would still stick with their current method unless on-street charging becomes either cheaper or meaningfully better.

Strategic Implication

The message here is unambiguous: on-street charging isn't unattractive, it's uncompetitive.

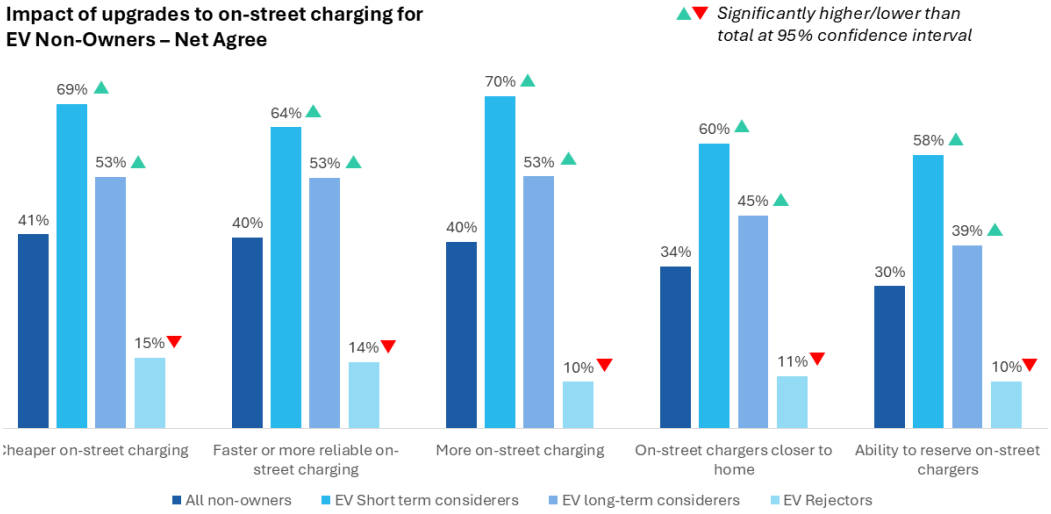
To Shift Behaviour

- Start with pricing parity: Remove or reduce the premium cost of public charging to unlock a 20–40% uplift in adoption.
- Then improve experience: Speed, reliability, and the ability to reserve build secondary value, especially for urban drivers without driveways.
- Make it visible and convenient: Even small improvements (e.g. closer placement or simplified payment) could bring marginal gains.

If we want people to use on-street charging, we need to treat it not as a fallback, but as a frictionless, affordable first choice.

On-Street Charging Could Be a Game-Changer, If It's Cheaper, Faster, and Closer

Cost, speed and coverage are the primary barriers to switching to EVs among Non-Owners



Impact of upgrades to on street charging for EV Non-Owners, Net Agree (YouGov, 2025)

Non-EV owners are highly sensitive to practical improvements in public charging infrastructure. Addressing their top three concerns, cost, speed, and availability, could dramatically improve consideration rates.

Key Findings

- 69% of short-term considerers and 53% of long-term considerers say they'd be more likely to switch if on-street charging were cheaper.
- 70% of short-term considerers also want more on-street chargers, with similar levels for faster and more reliable charging (64%).
- The ability to reserve chargers and have them closer to home also ranked strongly, with up to 58% of short-term considerers showing interest.
- In contrast, EV rejecters remain mostly unmoved, with just 10–15% showing increased consideration across any intervention.

Strategic Implications

This isn't about wishful thinking; it's about removing real-world friction.

- Short-term considerers are poised to convert, but only if on-street charging is visibly improved and cost-competitive.

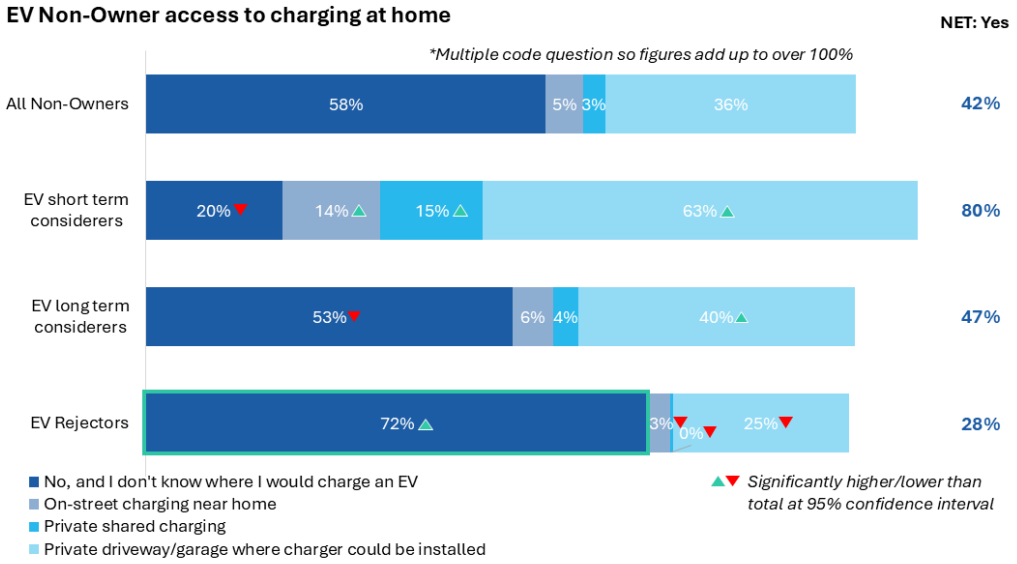
- Long-term considerers show strong responsiveness too, they may not switch tomorrow, but they're watching infrastructure evolve closely.

Policy Takeaway

Want to accelerate EV adoption? Make on-street charging better, cheaper, and more visible. Every percentage point gained from short- and long-term considerers represents thousands of future EVs, and cleaner, quieter communities in return.

Home Charging Access Is the Silent Deal-Breaker

Lack of access to charging at home is also prominent, peaking at 72% among rejecters



EV Non-Owner Access to Charging at Home (YouGov, 2025)

Perhaps the most decisive barrier to EV adoption is access to home charging. The difference in access between considerers and rejecters is stark, and reveals a powerful correlation between infrastructure and intent.

Key Findings

- 58% of all non-owners say they do not have access to EV charging at home, with 36% having a driveway or garage where a charger could be installed.
- 72% of rejecters say they don't know where they would charge an EV, a huge barrier that reinforces rejection as much as price or range.
- By contrast, 80% of short-term considerers and 47% of long-term considerers say they do have some form of home or near-home access, whether on-street, shared, or private.
- Only 25% of rejecters have a private driveway/garage where a charger could go, compared to 63% of short-term considerers.

Strategic Implications

Access to charging is not just a practical issue, it's a psychological one. If people don't know how or where they'd charge an EV, they mentally rule it out.

Public infrastructure planning must be led by this data. Households without driveways must be prioritised for on-street, lamp-post, and community charging rollouts.

Local authorities can play a transformational role, especially in urban areas where driveways are rare and demand is growing.

The Bottom Line

You can't consider what you can't imagine. And for too many would-be EV drivers, charging remains an abstraction, not an option. Fix that, and you fix the funnel.

EV Misconceptions

The Misinformation Barrier: What People *Think* They Know Is Stalling Progress

Despite rising awareness and availability of electric vehicles, misconceptions continue to dominate public thinking, and they are not fringe beliefs. They are mainstream, widespread, and persistent. This section outlines the scale, sources, and strategic implications of those misunderstandings, and demonstrates how targeted correction can shift perception, and ultimately, the market.

Myths Are the Majority View

A significant majority of UK drivers still view EVs as expensive, inconvenient, and under-supported:

- **86%** say EVs are too expensive
- **83%** believe charging infrastructure is inadequate
- **68%** say range is insufficient
- **60%** think batteries wear out quickly and are costly to replace
- A quarter even doubt EV sustainability or safety

These beliefs often run counter to reality, and notably, even some current EV owners still share them, albeit at much lower levels.

Insight

These aren't outlier views; they reflect the dominant mental model of the UK public. And until those changes, adoption will continue to underperform intent.

Rejecters Believe the Most Myths, But Owners Once Did Too

Rejecters score highest on every single misconception:

- **89%** say EVs are too expensive
- **82%** doubt range
- **78%** believe EVs aren't truly green
- Nearly **50%** question EV safety

By contrast, owners, who have firsthand experience, consistently score 30–50 percentage points lower on these same myths. The delta suggests that experience, not ideology, is the real antidote to misinformation.

Strategic Takeaway

Education can close the gap. Rejection is rarely based on facts, it's rooted in assumptions. Challenge those, and even hardened sceptics begin to soften.

Truth Changes Minds, Especially on Batteries

When presented with accurate information, public perception shifts measurably:

- **36%** were surprised to learn that EV batteries last 10–15 years
- **28%** became more likely to consider an EV after hearing that fact
- Other high-impact truths include faster-than-expected charging, strong safety ratings, and lower running costs

Key Learning

Battery lifespan is the single biggest lever. It carries both the highest surprise and highest shift in consideration, especially among long-term considerers.

Segment-Specific Messaging Works Best

Different audiences respond to different facts:

- **Short-term considerers** respond most to cost, safety, and speed
- **Long-term considerers** need reassurance on battery life and durability
- **Rejecters** are hardest to move, but even here, battery facts and range clarification yield small positive shifts

Implication

Mass myth-busting won't cut it. Effective campaigns must match the message to the mindset. One-size-fits-all approaches waste effort and dilute impact.

Myth-Busting Converts Interest into Intent

Most importantly, busting myths leads to behaviour change:

- Overall EV consideration jumped from **34% to 42%** after exposure to facts
- **+12ppt** uplift among long-term considerers
- Even **rejecters** moved **+3ppt**, proving no segment is beyond reach

Strategic Lesson

This isn't marketing fluff, it's measurable behavioural change. The more accurate, relatable information people receive, the more willing they are to reconsider.

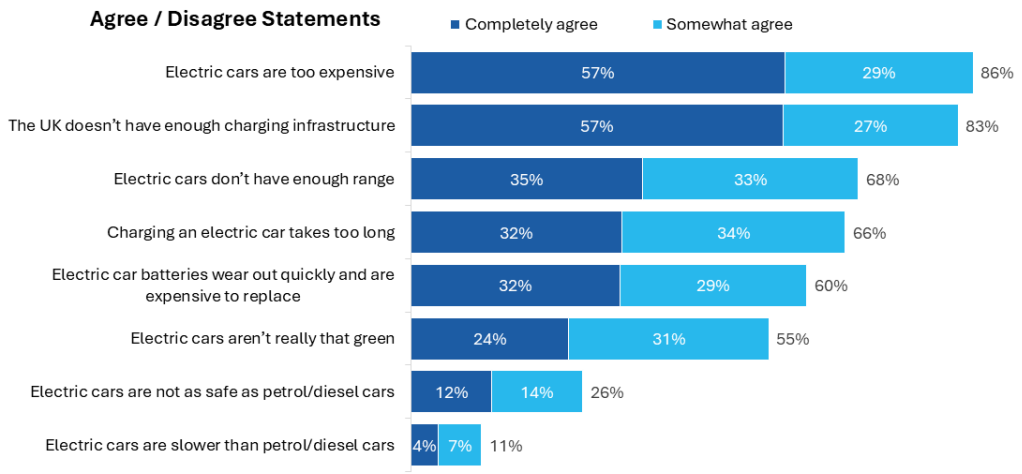
Deploy myth-to-fact interventions across all channels, ad campaigns, websites, dealer interactions, and local authority outreach. Equip all stakeholders with a credible, easily shareable truth.

The most powerful barrier to EV adoption isn't price, range, or charging; it's perception. And that's good news, because perceptions can be changed. But only if we actively, repeatedly, and precisely correct the record. The facts are on our side. It's time to use them.

EV Myths Remain Widespread, and Powerful

Over 8 in 10 UK drivers say EVs are too expensive and charging infrastructure is lacking

To a lesser extent, limited range and long charging time are also common perceptions about EVs



EV Agreeing and Disagreeing Statements (YouGov, 2025)

This chart illustrates the persistent negative perceptions surrounding electric vehicles, despite growing adoption.

Top Beliefs Among UK Drivers

- 86% believe EVs are too expensive, with a majority (57%) stating this "completely."
- 83% say the UK doesn't have enough charging infrastructure, underscoring public concern over access.
- More than two-thirds agree that:
- EVs don't have enough range (68%)
- Charging takes too long (66%)
- Batteries wear out quickly and are expensive (60%)

These views paint a picture of a market awash with persistent misconceptions and structural anxieties. They're not just cost objections, they're confidence gaps.

Even on questions of safety, performance, and green credentials

- 1 in 4 think EVs aren't truly sustainable
- 26% question EV safety

- 11% believe they are slower than petrol or diesel vehicles.

Strategic Response

Fact-based communication must go mainstream. These beliefs can't be dismissed as fringe views, they are the majority perception.

Busting the "expensive and inconvenient" narrative is essential. Break down cost of ownership, normalise charging habits, and showcase battery reliability.

Show don't tell: Use peer stories, test drives, and local case studies to shift mindsets from scepticism to trust.

This is not just about winning new customers, it's about rebuilding public understanding of a technology that has already outpaced public perception.

The future may be electric, but the present still needs convincing.

The More You Know, The Less You Fear, Misperceptions Fuel Rejection

Rejection towards EVs strongly correlates with biased perceptions

Interestingly, levels of agreement about pricing and charging infrastructures are also high among current EV owners

▲▼ *Significantly higher/lower than total at 95% confidence interval*

Agree / Disagree Statements – by segment

Net Agree	All drivers	EV Owners	EV Short-term considerers	EV Long-term considerers	EV Rejecters
Electric cars are too expensive	86%	64%▼	75%▼	87%	89%
The UK doesn't have enough charging infrastructure	83%	75%▼	79%	84%	86%
Electric cars don't have enough range for everyday driving or long trips	68%	33%▼	51%▼	65%	82%▲
Charging an electric car takes too long	66%	42%▼	58%	64%	75%▲
Electric car batteries wear out quickly and are expensive to replace	60%	22%▼	41%▼	55%	79%▲
Electric cars aren't really that green	55%	20%▼	44%	46%▼	78%▲
Electric cars are not as safe as petrol/diesel cars	26%	5%▼	21%	19%▼	45%▲
Electric cars are slower than petrol/diesel cars	11%	4%▼	20%▼	7%▼	18%▲

EV Agreeing and Disagreeing Statements by Segment (YouGov, 2025)

This provides the clearest evidence yet that rejection of EVs correlates strongly with belief in myths and misinformation.

What EV Rejecters Believe

- 89% say EVs are too expensive
- 86% believe the UK lacks charging infrastructure
- 82% think EVs don’t have enough range
- 79% think batteries wear out quickly
- 78% believe EVs aren’t truly green

Nearly half question EV safety (45%) and even performance (18%)

These views are consistently above the national average and stand in stark contrast to the experience of EV owners, who express significantly lower agreement across every single metric.

For example:

- Only 33% of owners think EVs lack range (vs 82% of rejecters)
- Just 22% believe batteries wear out quickly (vs 79% of rejecters)
- Only 20% of owners doubt EVs are environmentally beneficial (vs 78% of rejecters)

Strategic Implications

Rejection is rarely based on experience, it's rooted in perception.

The more informed and experienced the audience, the less likely they are to believe these myths. There is a clear case for nationwide education campaigns, peer advocacy, and EV trial opportunities, not just advertising. Targeted myth-busting should be tailored to address the most damaging misconceptions: cost, range, charging infrastructure, and battery degradation.

The Takeaway

You can't convert someone who doesn't believe the product is real, safe, or accessible. But you can educate, demystify, and demonstrate. Rejection isn't inevitable, it's just what happens when no one sets the record straight.

Busting the Myths, The Power of Facts to Shift EV Perceptions

Challenging Common EV Myths: How Facts Shift Perceptions

To explore the impact of accurate information, we first asked respondents how much they agreed with common misconceptions about electric vehicles. We then presented fact-based corrections and measured how surprising the information was — and whether it made people more likely to consider an EV in future.

False myths	Text shown to correct misconceptions
EVs Don't Have Enough Range	Most modern models offer between **200-300 miles per charge**, with some exceeding **400 miles** (e.g., Tesla Model S Long Range). For daily commutes and even many long trips, range is no longer a major issue.
Charging Takes Too Long	Charging time depends on the charger type: • **Ultra-rapid chargers** (100kW-350kW) can give **80% charge in 20-30 minutes.** • **Home charging** (7kW charger) typically takes **6-10 hours overnight.** For most drivers, overnight home charging or quick top-ups at rapid chargers make EVs practical.
EVs Are Slower Than Petrol/Diesel Cars	Many EVs are actually **faster** because of instant torque. Even non-performance EVs like the Kia EV6 can do **0-60 mph in under 5 seconds**, while high-performance models (e.g., Tesla Plaid) are among the fastest cars on the market.
The UK Doesn't Have Enough Charging Infrastructure	The UK now has **over 50,000 public chargers**, including more than **10,000 rapid and ultra-rapid chargers.** While some rural areas still have gaps, the charging network is growing rapidly.
EVs Aren't Really That Green	While battery production has a carbon footprint, **EVs still have lower lifetime emissions than petrol/diesel cars**—even in countries where electricity comes partly from fossil fuels. As the grid gets greener, EVs will become even more sustainable.
Electric car batteries wear out quickly and are expensive to replace	Most EV batteries last **10-15 years** and come with warranties of **8 years/100,000 miles**. Real-world data shows minimal degradation over time (e.g., Tesla batteries typically lose only **10-15% of capacity after 150,000 miles).**
Electric cars are too expensive	Upfront costs for buying an electric car can be higher, but **total cost of ownership is often lower** due to: • Lower "fuel" costs (electricity vs. petrol/diesel) • Cheaper maintenance (fewer moving parts, no oil changes) • Government incentives & tax benefits (e.g., lower company car tax)
Electric cars are not as safe as petrol/diesel cars	EVs consistently receive high safety ratings (e.g., Euro NCAP). Their **low centre of gravity reduces rollover risk**, and they must pass strict crash safety tests. Battery fires are extremely rare compared to petrol car fires.

EV Common Misconceptions (YouGov, 2025)

This encapsulates one of the most powerful interventions in the EV adoption journey: truth-telling. When confronted with fact-based corrections, even sceptical drivers begin to reconsider.

Seven of the Most Common EV Myths, and the Facts That Dispel Them

1. EVs don't have enough range? Most models now exceed 200–300 miles per charge, with top-end vehicles offering 400+ miles. For daily driving, range is rarely a limiting factor.
2. Charging takes too long? Ultra-rapid chargers deliver 80% in 20–30 minutes. Home charging overnight is convenient, routine, and efficient for most.
3. EVs are slower than petrol/diesel? Quite the opposite, EVs accelerate faster thanks to instant torque. Many outperform traditional sports cars.
4. The UK lacks charging infrastructure? The country now has 50,000+ public chargers, including 10,000+ rapid and ultra-rapid. While there are gaps, progress is rapid.
5. EVs aren't really green? They have lower lifetime emissions even with fossil-fuel grids, and this improves as grids decarbonise.
6. Batteries wear out quickly and are expensive? Most EV batteries last 10–15 years, with strong warranties and minimal degradation, typically 10–15% after 150,000 miles.

7. EVs are too expensive? While upfront costs can be high, total cost of ownership is often lower, thanks to:
    - Cheaper fuelling (electricity)
    - Lower maintenance
    - Government incentives

The Strategic Lesson

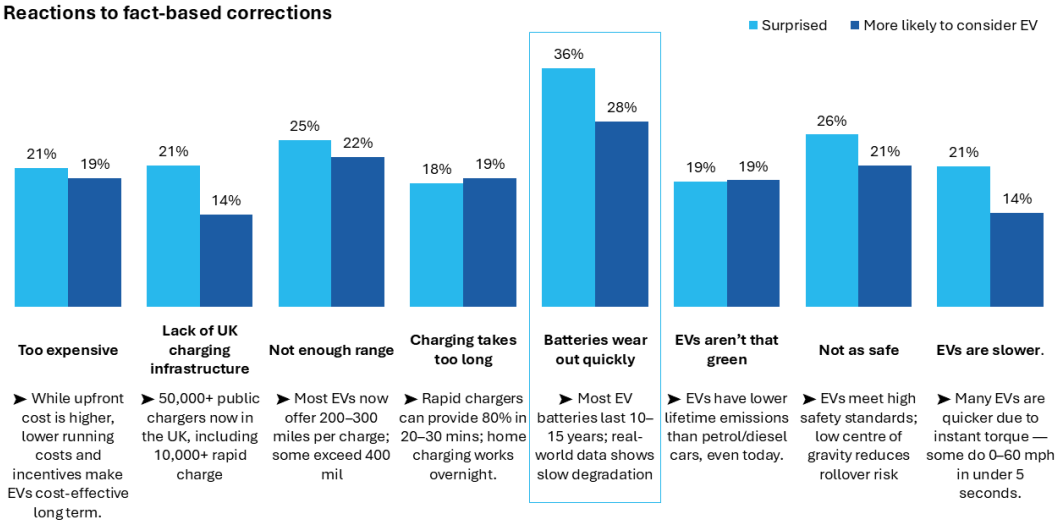
When people are told the truth, clearly, confidently, and credibly, their beliefs begin to shift. Not instantly, but measurably.

This isn't just myth-busting. It's trust-building.

To win the next generation of EV drivers, we must stop assuming they know the facts and start proving them. Repeatedly, respectfully, and without the jargon. Because the most significant barrier isn't technology, it's misinformation.

Battery Facts Shift Minds, The Right Information Drives EV Consideration

Correct information on EV battery lifespan drives the biggest boost in surprise and EV consideration



Reactions to Fact-Based Corrections- Correct Information on EV Battery Lifespan Drives the Biggest Boost in Surprise and EV Consideration (YouGov, 2025)

This reveals the power of precise myth-busting. When people are exposed to facts about electric vehicles, their surprise is measurable, and more importantly, so is their openness to change.

Biggest Impact: Battery Life

- 36% of respondents were surprised to learn that EV batteries typically last 10–15 years with slow degradation.
- 28% said they were more likely to consider an EV after learning this, the highest increase across all myths tested.

This reflects deep misunderstanding, and huge potential, around EV longevity and value.

Other High-Impact Corrections

- "EVs are not as safe" surprised 26% and increased consideration among 21%, showing that safety myths remain potent.
- Range, cost, and infrastructure facts each moved the needle for roughly 20–22% of respondents.
- Even less tangible beliefs like "EVs are slow" saw 21% surprised and 14% reconsidering.

Strategic Implications

Correcting battery lifespan myths delivers the biggest shift in attitude, and should be central to future EV communications.

Surprise correlates with consideration: the more unexpected the truth, the more likely people are to rethink.

Myth-busting isn't just education, it's conversion. Every surprise is a step closer to confidence.

Call to Action

Integrate this kind of myth-to-fact messaging across websites, test drives, advertising, and public policy campaigns. Because as this data proves, what people think they know is often the only thing stopping them from saying "yes."

Challenging misconceptions about EV pricing and safety is key to boosting adoption among short-term considerers, while for long-term considerers, reassurance around battery lifespan is the main driver.

One Size Doesn't Fit All, Tailored Truths Move Different Audiences

Reactions to fact-based corrections – by segment		All drivers	EV Owners	EV Short-term considerers	EV Long-term considerers	EV Rejecters
Electric cars are too expensive ➤ While upfront cost is higher, lower running costs and incentives make EVs cost-effective long term	Net Surprised	21%	8% ▼	33% ▲	22%	18%
	Net More likely to consider EV	19%	24%	57% ▲	23% ▲	3% ▼
The UK doesn't have enough charging infrastructure ➤ Many EVs are quicker due to instant torque — some do 0–60 mph in under 5 seconds	Net Surprised	21%	18%	44% ▲	21%	19%
	Net More likely to consider EV	14%	18%	37% ▲	16% ▲	4% ▼
Electric cars don't have enough range ➤ Most EVs now offer 200–300 miles per charge; some exceed 400 mil	Net Surprised	25%	7% ▼	37% ▲	27%	22%
	Net More likely to consider EV	22%	27%	50% ▲	28% ▲	7% ▼
Charging an electric car takes too long ➤ Rapid chargers can provide 80% in 20–30 mins; home charging works overnight	Net Surprised	18%	3% ▼	22%	23% ▲	12% ▼
	Net More likely to consider EV	19%	20%	39% ▲	25% ▲	5% ▼
Electric car batteries wear out quickly and are expensive to replace ➤ Most EV batteries last 10–15 years; real-world data shows slow degradation	Net Surprised	36%	12% ▼	38%	40% ▲	31% ▼
	Net More likely to consider EV	28%	26%	43% ▲	36% ▲	9% ▼
Electric cars aren't really that green ➤ EVs have lower lifetime emissions than petrol/diesel cars, even today	Net Surprised	19%	8% ▼	35% ▲	18%	19%
	Net More likely to consider EV	19%	23%	47% ▲	23% ▲	3% ▼
Electric cars are not as safe as petrol/diesel cars ➤ EVs meet high safety standards; low centre of gravity reduces rollover risk	Net Surprised	26%	9% ▼	44% ▲	27%	24%
	Net More likely to consider EV	21%	26%	55% ▲	25% ▲	5% ▼
Electric cars are slower than petrol/diesel cars ➤ Many EVs are quicker due to instant torque — some do 0–60 mph in under 5 seconds	Net Surprised	21%	6% ▼	26%	21%	22%
	Net More likely to consider EV	14%	22% ▲	35% ▲	17% ▲	3% ▼

Reactions to Fact-Based Corrections by Segment (YouGov, 2025)

This breaks down how each audience segment reacts to corrected EV misconceptions, and it reveals a powerful truth: the right message for one group may fall flat with another.

Short-Term Considerers: Moved by Price, Safety, and Speed

- 57% are more likely to consider EVs after learning they're more cost-effective in the long run.
- 55% are swayed by safety information, and 35% by performance truths.
- They are also the most surprised group overall, showing that myth-busting is particularly effective with those already leaning in.

Long-Term Considerers: Battery Confidence is the Key

- 40% are surprised, and 36% more likely to consider, once reassured that EV batteries last 10–15 years.
- Strong responses also come from range, charging time, and pricing, though not as intense as short-term considerers.

EV Owners: Already Informed, Still Influenced

- Owners are less surprised (as expected), but remain open to refining their beliefs, particularly around range, safety, and environmental impact.
- This suggests that even adopters benefit from reinforcement and can become powerful advocates when equipped with facts.

Rejecters: Deeply Sceptical, But Not Entirely Unreachable

- Across every myth, rejecters are least likely to be surprised or influenced, with net consideration shifts as low as 3–9%.
- However, battery lifespan, range, and charging speed still show small shifts, and should be starting points for engagement.

Strategic Takeaway

Use segmentation to drive impact: Don't blanket the market with one myth-busting campaign. Match the message to the mindset.

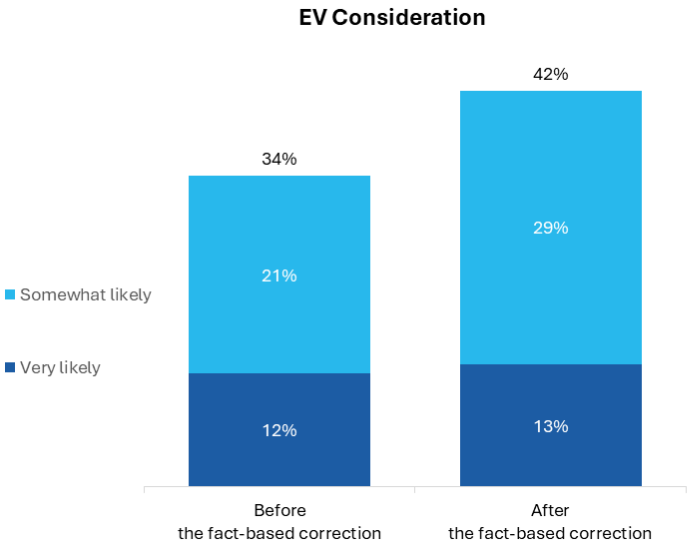
- Short-term considerers want reassurance and practicality.
- Long-term considerers need confidence in durability and performance over time.
- Rejecters require repeated, low-friction exposure to facts, preferably from trusted peers, not brands alone.

The truth works, but only if it speaks to the right fear, the right question, and the right person. This chart shows how.

Facts Move Markets, Myth-Busting Increases EV Consideration

Addressing false myths can have a substantial impact on the propensity to buy electric vehicles.

The uplift is greater among long-term considerers, but we also see a directional increase among rejecters



Consideration over time

6% Short Term
(within the next year)

60% Long Term
(within the next 5 years)

Uplift by segment	
All drivers	+8ppt
EV owners	+/-0ppt
EV short-term considerers	+4ppt
EV long-term considerers	+12ppt
EV rejecters	+3ppt

EV Considerations Before and After Fact-Based Corrections (YouGov, 2025)

This chart brings the whole story together: correcting false beliefs measurably increases consideration of electric vehicles.

Headline Shift

- Before fact-based correction, 34% of UK drivers said they were likely to consider an EV.
- After seeing accurate information, that rose to 42%, an 8-point increase.
- This is not a marketing gimmick, it's behavioural change triggered by trust and truth.

Segment Breakdown

- Long-term considerers showed the greatest uplift: +12ppt
- Short-term considerers saw a +4ppt shift, indicating they were already near the decision point.
- Even rejecters showed a directional lift (+3ppt), proving that no audience is immune to facts.

What Changed Most

Most of the uplift came from drivers moving from “not at all” to “somewhat likely”, suggesting that myth correction opens the door to further engagement.

Strategic Implication

Myth-busting isn’t a one-off; it’s a gateway. Use it to transition people from dismissal to curiosity.

Prioritise segments where the uplift is highest, especially long-term considerers, who are persuadable but cautious.

Equip local authorities, dealers, and infrastructure providers with myth-busting tools, not just promotional materials.

Because the moment you replace a myth with a fact, you don’t just inform, you create momentum. And in the race to net zero, momentum is everything.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