

# The Great EV Charging Report 2024



# Foreword

## The Great EV Charging Report 2024

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EVA England is dedicated to advocating on behalf of electric vehicle drivers in England and accelerating the adoption of electric vehicles. One such way we achieve this mission is by undertaking surveys of EV drivers to make informed recommendations to policymakers and industry stakeholders.

Since launching our first survey in 2021, we have seen extremely strong satisfaction levels within the EV community, with an overwhelming 91% of EV drivers reporting last year that they had no intention of returning to a petrol or diesel car.

Our last survey also helped us identify specific issues with the charging network, a lack of home charging solutions for the growing number of EV drivers without private driveways; and a distinct lack of charging options for disabled drivers.

This document reports on the findings of The Great EV Charging Survey 2024, a survey conducted through an online questionnaire from August 1st to August 18th 2024. I am grateful to every one of the 1,749 EV drivers who shared their views and helped us understand the challenges, satisfaction levels, and expectations of current EV drivers with the ownership experience and their views over the current charging network.

This is particularly timely given the urgent need for a robust charging infrastructure to meet the UK's ambitious Net Zero goals, which are coming into effect at the end of this year and will require EVs to constitute more than 1 in 5 new car sales. Thanks to consistent year-on-year sales, EVs are at the cusp of the mainstream; avoiding a slip up in demand as more people consider the switch is an immediate consideration.

This survey aims to provide insights into the key pressures for the EV sector, providing us with a driver-led perspective into the purchasing decisions, and driving and charging experiences, all motivating current and prospective EV drivers.

I hope you find this report insightful, and please do not hesitate to contact us with your questions.



**James Court**  
CEO, EVA England

# The Great EV Charging Report 2024

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# Executive Summary

The Great EV Charging Report 2024

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This year's Great EV Charging Survey has revealed another resounding 'yes' from electric vehicle (EV) drivers, who remain just as satisfied with owning an EV and, most encouragingly, are now more confident in the charging network than a year ago.

The record year-on-year increase in public chargers is working, it would seem, backed up by the 64% of respondents who feel the network has improved in the last 12 months.

Our survey, now allowing EVA England invaluable year-on-year comparisons, has been an opportunity to reflect on where the sector is headed, which Government policies are having a tangible impact on EV drivers, and which are being most called for next by drivers themselves. We have divided our key findings into two broad categories: shifts and trends in demand, and perceptions over the charging network.

## **Demand and uptake**

2024 has shown once again steady signs of growth in EV sales, and our survey supports the theory that a broader category of consumers is now considering the switch to EV. Year-on-year comparisons suggest the 'typical' EV driver is now more representative of the average consumer. This has not impacted on last year's resoundingly high satisfaction rates, however: yet again, over 9 in 10 would not go back to petrol or diesel, and 86% are finding EVs cheaper to run.

The big consideration now is cost. More drivers are looking to the second-hand market for their EV and responding to significantly lower prices in this section of the market. Among newer drivers in our survey, 31% sourced their EV through the second-hand market, up from 20% a year ago. We've also noticed a surge in drivers looking towards employer rental and purchasing schemes, where EVs are typically much more affordable and come alongside advantageous tax incentives.

Year-on-year, overall demand has grown but perhaps not quite to the extent needed to reach fast-approaching Net Zero goals. Policy input is needed and a number of solutions are at hand. Some solutions recently identified by EVA England policy analysis received broad support in this year's survey. This was the case for targeted, low-cost schemes to expand demand in newer, relatively untapped consumer bases – 0% loans for second-hand EVs topped the list, whilst 'French-style' social leasing schemes, and re-establishing the 2030 Phase Out date for Internal Combustion Engine (ICE) vehicles, also proved popular.

### Charging

Drivers are responding to the vast increases in national public charging infrastructure in the past year. We've noticed a 22% increase in the number of drivers reporting no or very few concerns in locating a charging point. They are more confident too, with a similar increase in numbers reporting never having suffered so-called 'range' or 'charging anxiety'.

Pressure is only set to mount on the network, however, as growing demand and growing reliance on public charging is set to continue. For example, of drivers without off-street parking, more than half solely rely on the public network to meet all of their charging needs. The expansion of the network must consider a greater variety of on-street charging solutions that will be especially needed in urban environments.

This year's survey has allowed us to identify 4 key areas in which policy focus is needed to address our remaining charging barriers, as vocalised by drivers:

- **Concerted push on public charging:** Further developing the network and filling provision gaps is key to keeping at pace with demand. Urban centres are a particular pressure point, where drivers rely more on public charging and more frequently. Pressure points in this area fall under two broad categories: planning barriers, firstly, need addressing as a major obstacle to the vast amounts of private funding currently unable to translate into new installations; secondly, highly successful central funding schemes such as the Local Electric Vehicle Infrastructure (LEVI) fund and Rapid Charging Fund (RCF) will either need expanding or replacing under the new Government.
- **Accessibility:** The charging network remains woefully maladapted for disabled drivers, with 60% reporting at least one issue when using a public charger. New installations should be mandated to comply with accessibility requirements – already clearly defined under the PAS 1899 framework.
- **Address high public charging costs:** Despite the vast majority (86%) finding EVs cheaper to run, there is a noticeable difference among drivers who charge only via public charge points, only half of whom agree. Research shows the average petrol and diesel car currently runs at an approximate cost of 16p- 17p per mile, markedly higher than the estimated 6p per mile afforded by, on average, an EV home charger. Switch to a rapid or ultra-rapid charger on the public network, however, and the cost per mile jumps to 24p per mile, on average. The discrepancy between private and public charging costs remains a priority issue for drivers, especially considering connecting an EV to a home charging point is not a luxury accessible to all. 9 in 10 respondents this year have renewed their call to remove or reduce VAT on public charging.
- **Grant drivers the Right to Charge:** Drivers are resoundingly in favour of expanding access

to 'home' and 'destination' charging solutions that would help free up capacity on the public network and give options to the growing number of drivers without off-street parking. Removing restrictions surrounding gully installations (a form of cross-pavement charging solution), allowing presumptive landlord-tenant agreements for renters to install their own charge points, and mandating larger businesses to provide EV charging points are some policy solutions that EV drivers were broadly in favour of.

Altogether, this has been another positive year for the EV sector. Impressive progress on the national public charging network is clearly having a positive impact on consumer confidence.

Our survey provides reassurance that top-down policy implementations do have an impact on the driver experience. However, drivers without access to off-street parking remain a notable outlier. Because they are more reliant on public charging, they are more exposed to higher charging costs and, as a result, statistically less confident in the overall EV experience. Policy input is needed to grant this growing proportion of drivers the 'right to charge' privately and more affordable public charging.

Our survey respondents have enabled us to identify some of these current pressure points, which this report delves into as well as some of the key solutions to hand.



*"When we published the House of Lords Environment & Climate Change Committee's 2024 report assessing the UK's electric vehicle strategy, we stressed that the UK's legally binding net zero target by 2050 fundamentally requires a successful transition to electric vehicles.*

*EVA England's survey confirms some of the positive strides made with uptake and, most notably, charging infrastructure. But it also underscores how much work we have left to do. Access to charging remains unequal and the cost is in some cases too high. We have not quite reached the point at which EVs are affordable to all sections of the population, either. Similar to the conclusions of our report, this survey supports a need for Government focus on the sector in the years ahead."*

- Baroness Parminter, Chair of the Environment and Climate Change Committee 2021-2024



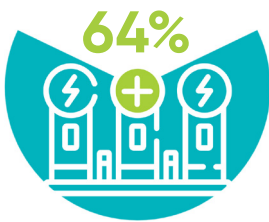
# Key numbers

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**91% of EV drivers would not go back to petrol and diesel**

**86% find EVs cheaper to run compared to a petrol or diesel car**



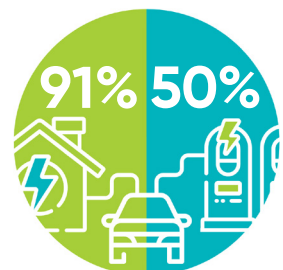
**64% feel the public charging network has improved over the past 12 months**

**Over half of those without driveways do all their charging via the public network**



**More than half of new EV drivers are now switching for cost reasons**

**Charging divide:  
9 in 10 drivers with home chargers find EVs cheaper  
Only 5 in 10 for those using public charging only**



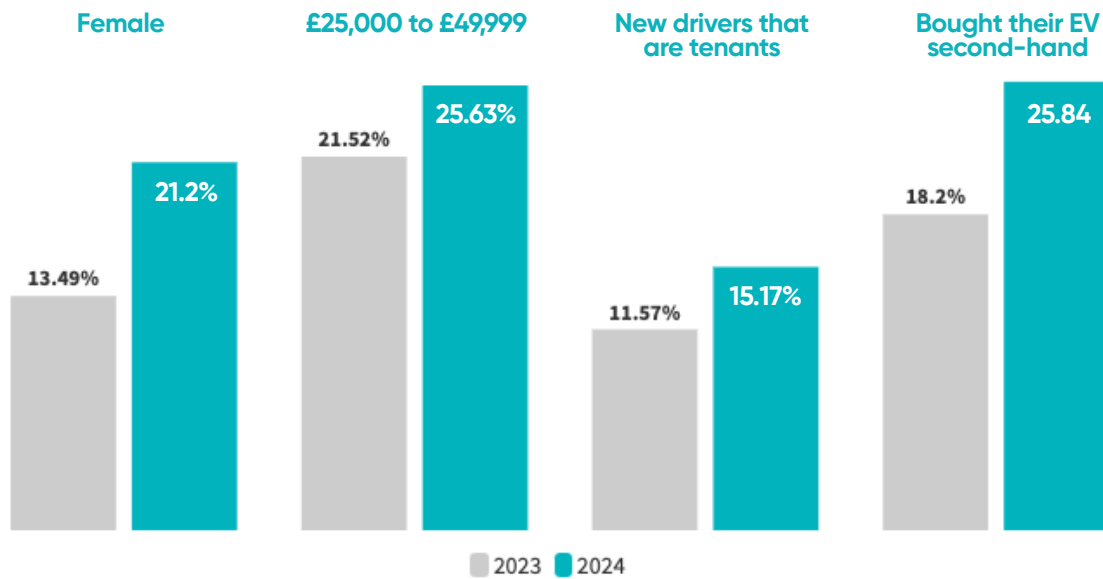
# Towards mainstream ownership?

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## New demographics

A key point to note from this year's survey is that the profile of respondents has noticeably changed from a year ago, where 85% of respondents were male and the most represented household income bracket was 50k-75k per year.

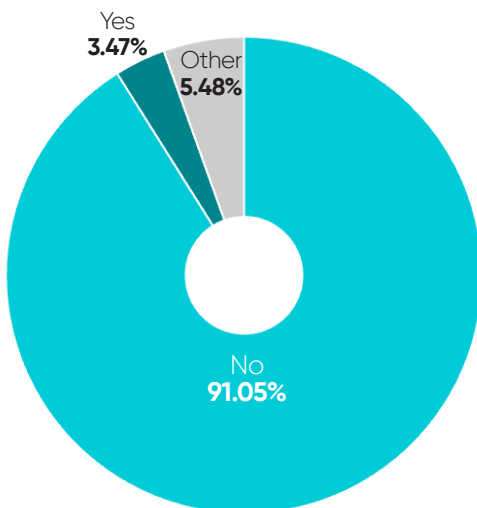
The profile of respondents this year, however, would suggest the 'typical' EV driver is now more diverse, and more representative of the average consumer:



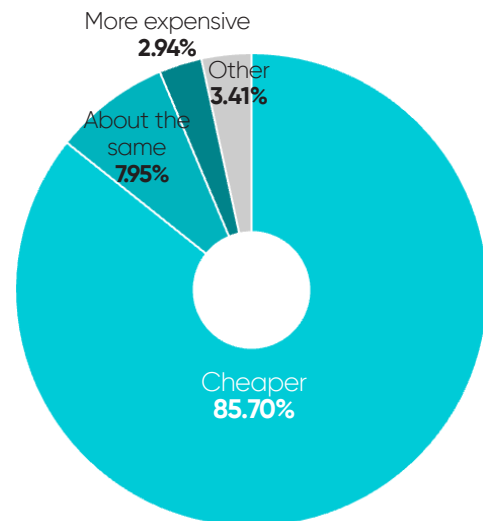
## Repeated confidence from EV drivers

Overall, confidence in the market has remained strong and consistent: 91% would not return to petrol or diesel, and an encouraging 86% have found EVs cheaper to run.

As an EV driver, would you like to return to a petrol/diesel car?



Have you found the running costs of your EV to be cheaper than a petrol/diesel car?





# Top reasons for switching to electric

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## Cost

Most interestingly, we noticed nearly a third of respondents cited cost as a factor in their decision to switch to electric. A promising insight suggesting that consumers are looking to EVs not only as an environmentally friendly alternative to petrol and diesel, but as a consumer product like any other first and foremost. A means of getting from 'A to B' in an affordable, practical manner.



### What was your top reason for getting an EV?

*"Cheaper running costs"*

*"Cost effective"*

*"Best bang for the buck"*

*"Saving. The planet and money"*

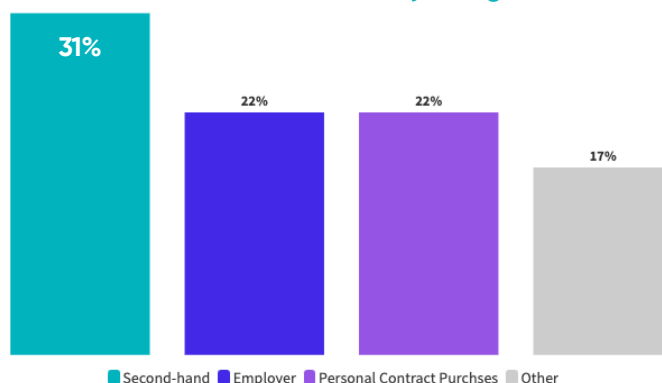
*"Overall cost of ownership"*

*"TL;DR: they're better.  
Longer version: they're better and cheaper to drive but crucially they're better to mitigate climate change and air quality issues"*

With recent public analyses showing that new petrol cars can cost, on average, £700 more per year to run than EVs<sup>1</sup>, the sector remains in a prominent position when it comes to attracting new drivers who previously would not have considered the switch. For the majority of drivers, EVs remain a cheaper overall prospect for drivers.

Supporting the theory that cost is now the leading consideration, our survey highlights a noticeable shift in purchasing methods among new EV drivers, especially.

Car ownership types for EV drivers who switched less than a year ago



<sup>1</sup> [Energy and Climate Intelligence Unit, 2023. New analysis: petrol car drivers paid a £700 'petrol premium' in 2023](#)

Among those who switched to an EV this year, most bought a second-hand model, and a similar number went via their employer thanks to favourable Benefit-in-Kind (BiK) rates and salary sacrifice schemes. There was a significant decline in new drivers buying a new EV outright.

### Focal areas

Representing nearly 3 in 5 new drivers, we dug deeper into two currently popular purchasing methods: via the employer and via the used EV market.

#### 1. Low-cost incentives

When asked for their reasons to switch, many respondents cited work-based tax incentives that are especially favourable for EVs.

**Benefit-in-Kind (BiK)** tax rates – the amount taxed on non-cash employee benefits – are currently as low as 1% for EVs, making them much more attractive prospects for company cars.

In conjunction, **Salary Sacrifice schemes**, allowing employees to exchange part of their salary towards a good with often attractive tax-saving incentives, have proven hugely popular for EVs, granting roughly 30–60% in savings compared to leasing an EV privately. Take up in the scheme rose by nearly 50% over 2023, with 84% of signees opting for an EV<sup>2</sup>.



#### What was your top reason for getting an EV?

*"Low BiK, running costs and cheaper"*

*"Cheaper on salary sacrifice"*

*"Tax breaks and cost savings"*

*"BiK value"*

*"Salary sacrifice scheme and tax benefits"*

*"Needed a new car, wanted to go electric and my company started doing salary sacrifice scheme"*

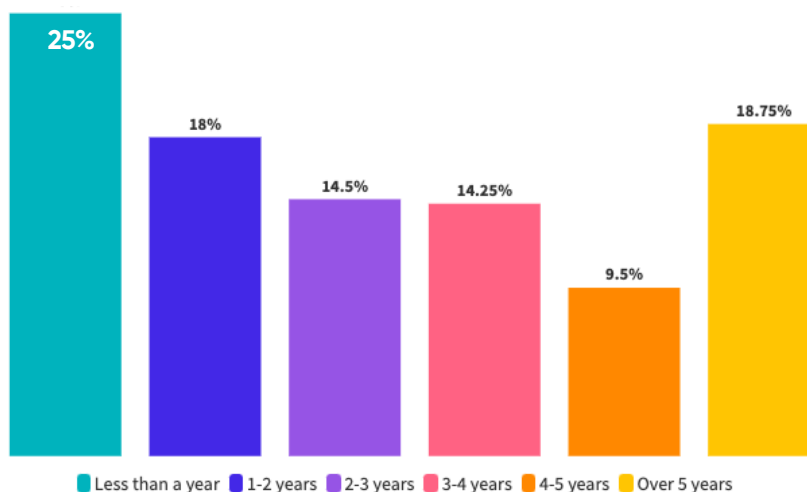
Owing to their popularity and effectiveness at promoting EVs, EVA England is advocating for Salary Sacrifice schemes to be made mandatory for all companies over 50 employees – a move that could benefit a potential 14 million employees across the UK.

<sup>2</sup> [Personnel Today, 2024. Salary sacrifice boosts electric vehicle take-up](#)

## 2. Used EV market

The second-hand market is an important bellwether for the health of the sector overall, as the primary segway into car ownership for a majority. It is interesting to note that among respondents who bought their EV second-hand, most (25%) did so under a year ago.

Second-hand EV drivers - How long have you been driving an EV?



The second-hand EV market is indeed now an attractive proposition: like for like equivalents now show the cost of many second-hand EVs to be on par with ICE. After just one year, for example, a petrol Mercedes-Benz GLA costs roughly £29,000, compared to around £27,000 for an electric Mercedes-Benz EQA<sup>3</sup>.

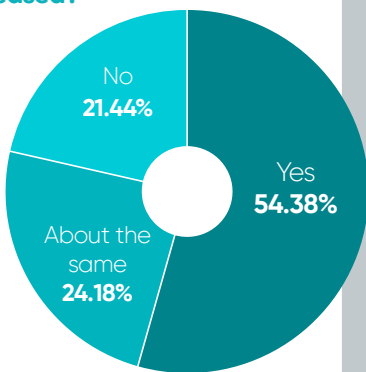
<sup>3</sup> [This Is Money, 2024. The sweet spot when EVs become better value than petrol cars revealed](#)

# Next steps to driving demand

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The increasing variety among EV drivers is testament to how well the sector has adapted, from being a largely novel, expensive technology to one that is quickly becoming accessible to most. However, while 23% of all UK car sales were EVs in August<sup>4</sup> – the highest share since December 2022 – new EV sales noticeably slowed down over the course of 2023 and into 2024, at least in part following the closure of some Government schemes aimed at supporting initial uptake, such as the Plug-in Car Grant<sup>5</sup>, but also due to a range of other factors such as global supply chain movements.

In the past 12 months, has the insurance premium on your EV increased?



## Not all good news

As price considerations become more of a factor for EVs, it is worth noting that certain barriers continue to affect this relatively nascent market.

High insurance costs, for instance, while impacting all vehicle types over the last two years, severely hampered the EV sector with some [72% increases seen in 2023](#). And the issue seemingly continues: in our survey, 54% of respondents reported increases in their insurance premium in the past year.

Digging deeper, there remains a skills gap and parts shortage in the UK's EV sector: on average, repair times for EVs are [14% longer than for ICE vehicles](#), and repairs cost over 25% higher than for diesel equivalents.

The risk now, is that any let up in demand among income groups that have up to now not looked beyond ICE vehicles could quickly undo the enormous progress made over the last few years. The continued confidence among EV drivers and consistent growth in their market share is a mandate to continue incentivising take-up, not a reason to sit back.

<sup>4</sup> [New Automotive, 2024, Summer surge in EV sales heralds cheaper driving for UK motorists](#)

<sup>5</sup> [Fleetworld, 2022, Government closes Plug-in Car Grant to focus on improving EV charging](#)

# Further policies to look to

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A number of quickly implementable schemes are at the Government's disposal to help boost demand in new segments of the market, at very little cost.

Just this year, France launched a highly targeted social leasing scheme aimed at supporting lower groups afford low-cost, European-made EVs – both helping create new demand and boost homegrown manufacturing, too. Our survey shows that low-cost, targeted affordability schemes were broadly popular among respondents, too:



## Moving back to 2030

Last year's announcement that the Government's headline Phase Out target banning all new ICE car sales would be delayed from a 2030 deadline to 2035 was widely argued to have impacted confidence in the sector, sowing doubt among drivers considering an imminent switch.

As one of its flagship policies for the sector going into the General Election, Labour's commitment to moving this key target back to its original 2030 date has been cemented by a recent announcement that it will soon consult on the policy later in the Autumn.

Our survey found that more than two thirds are in favour of a return to 2030.

# Charging: Drivers are noticing increased supply

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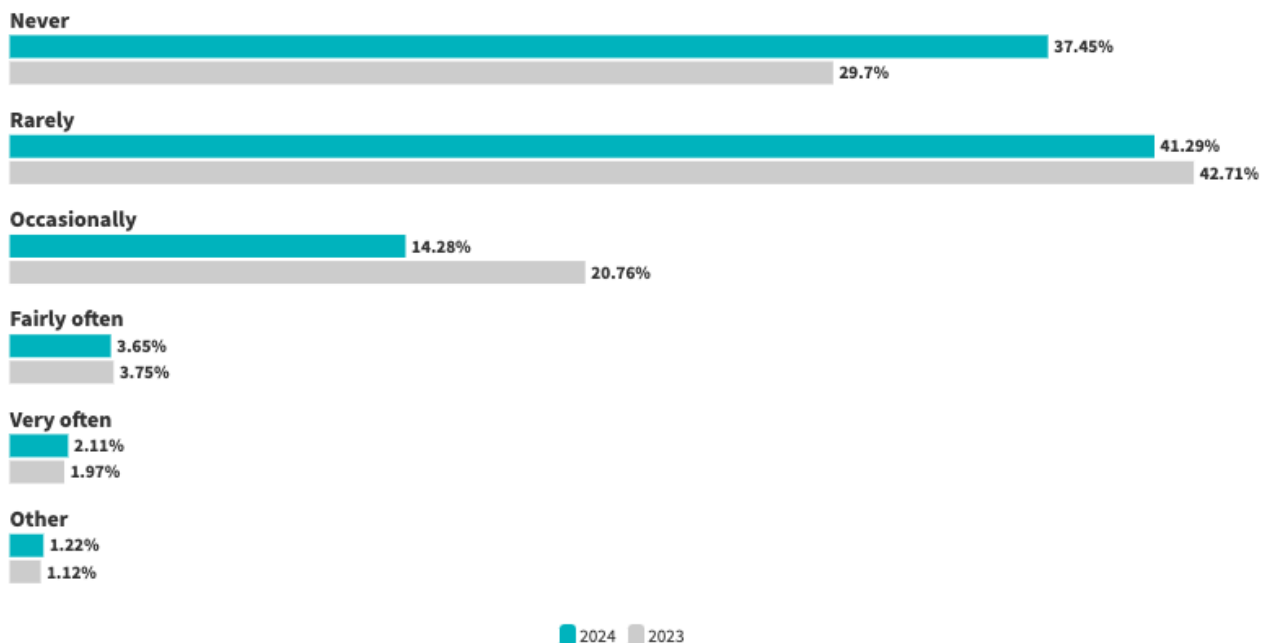
A key focal point of the EVA England survey, this year has given us the chance to assess how drivers' perceptions of the EV charging experience has evolved in the past year.

The key takeaway is that drivers are noticing improvements in the national charging infrastructure. Compared to 2023, there has been a 23% year-on-year increase in the number of drivers having never experienced so-called range or charging anxiety.

With more than 65,000 public chargers were installed in the last year alone<sup>6</sup>, increased investment in key national infrastructure has therefore translated into a reliable consumer experience. As per our survey, two thirds of drivers have either rarely or never had concerns over finding a public charging point, up 22% year on year.

That 64% of drivers feel their experience of charging infrastructure has improved over the past year is an important reminder that further concerted effort – involving Government, local authorities, and a wide plethora of EV stakeholders – will be needed to keep expanding the network and maintain pace with a growing demand.

## How often do you experience range or charge anxiety?



<sup>6</sup> Department for Transport, 2024. Electric vehicle public charging infrastructure statistics: July 2024

# Improved charging experience

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Regulatory changes can occasionally have a revolutionary impact on an entire sector, and this is certainly the case for the Charge Point Regulations 2023 coming into near-full effect in November this year<sup>7</sup>. Providing for the first time a clear framework by which the EV charging industry reports, monitors and ultimately prices its charging infrastructure, drivers are already responding to improvements in their day-to-day experience of using charging points.

Some changes are already available to users, such as live charger locations and operational status being provided by some operators on open source platforms. In our 2021 survey, our main recommendations based on driver feedback were largely focused on the poor experience being reported at public EV charging points: drivers reported being strongly in favour of contactless payment methods, easily accessible data on charger locations and status, a clear singular pricing metric, and a robust 99% reliability.

These responses formed essential feedback that was used in the Government consultation which ultimately shaped the 2023 Charge Point Regulations, leading to important progress for the sector in providing a consistent, reliable charging experience for drivers.

Among our respondents this year, only 5% reported locating a charging point difficult, 77% found charging points to be generally in good working order.



## Charge Point Regulations 2023: what's covered?

- Most public charge points will need to offer contactless payments.
- Rapid charge points must be 99% reliable, and compliance must be published online.
- Charge points should all provide and display a 24/7 staffed telephone helpline.
- Location and pricing data must be made publicly available .
- The maximum price of a charging session must be displayed clearly on each charging point or associated online platform.

<sup>7</sup> [Department for Transport, 2023. Public Charge Point Regulations 2023 guidance](#)

# What EV drivers are calling for next

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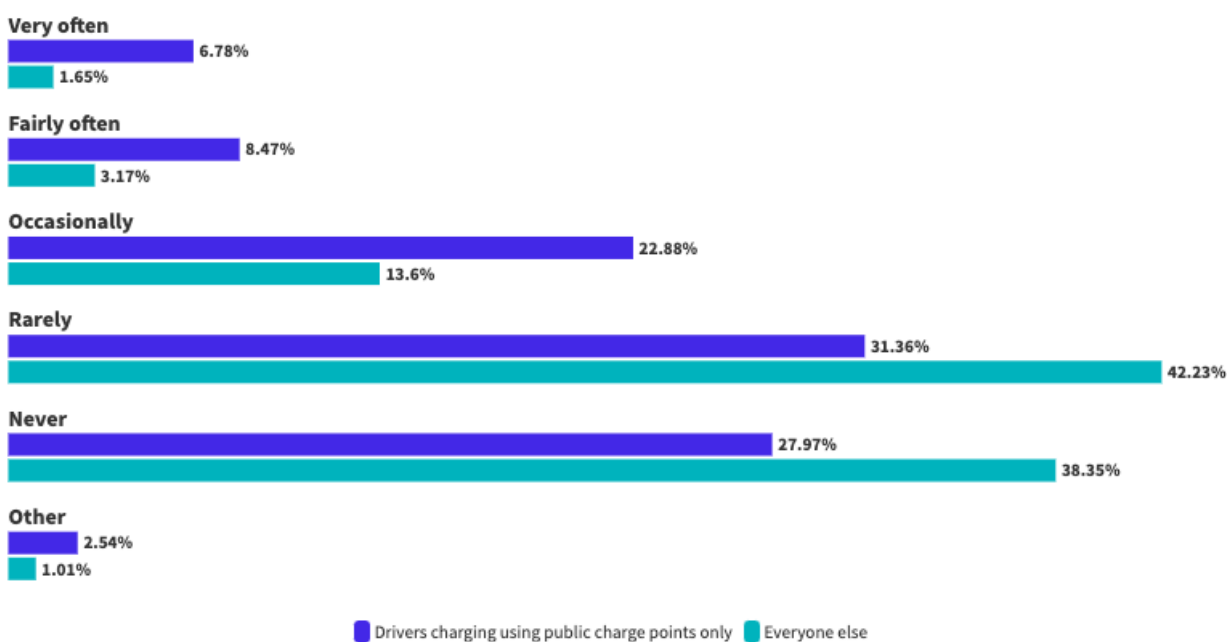
Accelerating the rollout of public charging points was outlined very early on as a key priority for the Labour Government. What, then, should the Government take into account, as communicated by the drivers themselves?

## 1. Public charging: build on the current success and fill provision gaps

Our survey has afforded some insights into the robustness of the public charging network as EV demand continues to grow. Looking to respondents solely reliant on the public charging network stresses the fact that, despite huge strides in public charging, a concerted input remains needed by Government, local authorities, and the EV sector to continue delivering at pace.

For example, 'public charging only' drivers, while still broadly satisfied, are noticeably less confident compared to the average EV driver. 80% of those who mostly charge at home never or rarely experience 'charging anxiety' – dropping to 60% among those solely reliant on the public network.

How often do you experience range or charge anxiety?  
Drivers using public charging only vs everyone else



The challenge to expand the public network is huge. To meet the UK's key target of 300,000 public charging points by 2030 and match the pace of growing demand, the current rate of new installations is required to treble<sup>8</sup>.

A number of solutions are to hand to speed up the current rate. Firstly, Granting Charge Point Operators (CPOs) Statutory Undertaker status – similar to major telecoms and

8 [Climate Change Committee, 2024, 2024 Progress Report to Parliament](#)

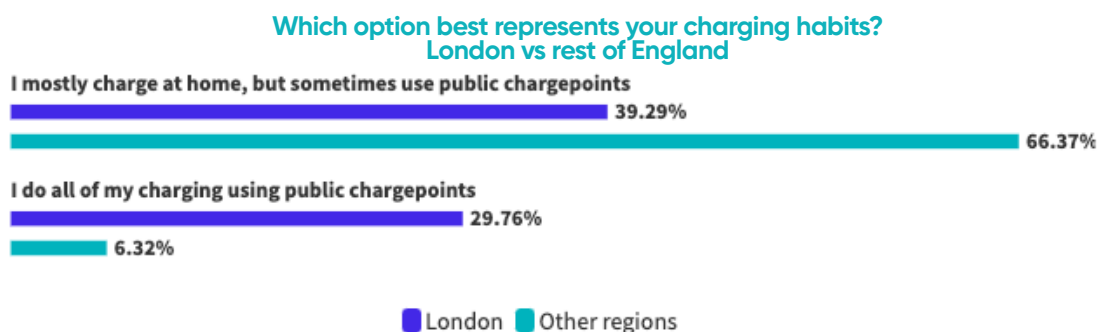


energy providers – is one way to lessen the administrative burden currently slowing down the huge private sector sums ready to be invested in the public network. Planning restrictions remain overly burdensome on the sector, and liberating these funds should be a priority to increase the intensity of the current rollout. As well as granting CPOs a more appropriate planning status, energy planning issues can be solved via devolved regional and local energy spatial plans.

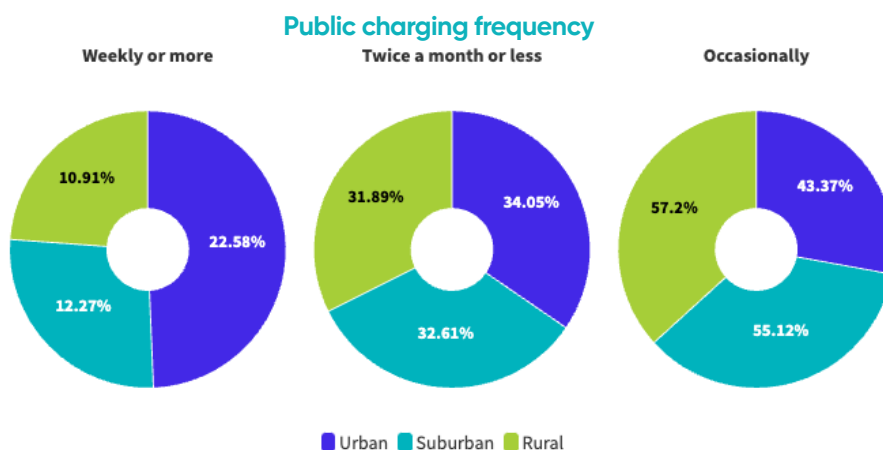
With regard to central Government funding, existing funds have been key drivers behind the recent rollout success, but will soon need either replacing, reinforcing, or reimagining altogether. Some schemes, such as the Local Electric Vehicle Infrastructure (LEVI) fund, are deemed ‘safe’ in legacy amid the political backdrop – 90% of LEVI funding has already been allocated to local authorities, for instance<sup>9</sup>. However other successful funds, such as the £950m Rapid Charging Fund remain at pilot stage, with no guarantees of extension in context of severe budgetary constraints<sup>10</sup>.

According to our survey:

- 30% of Londoners do all of their charging using public charge points, compared to only 6% in other regions.



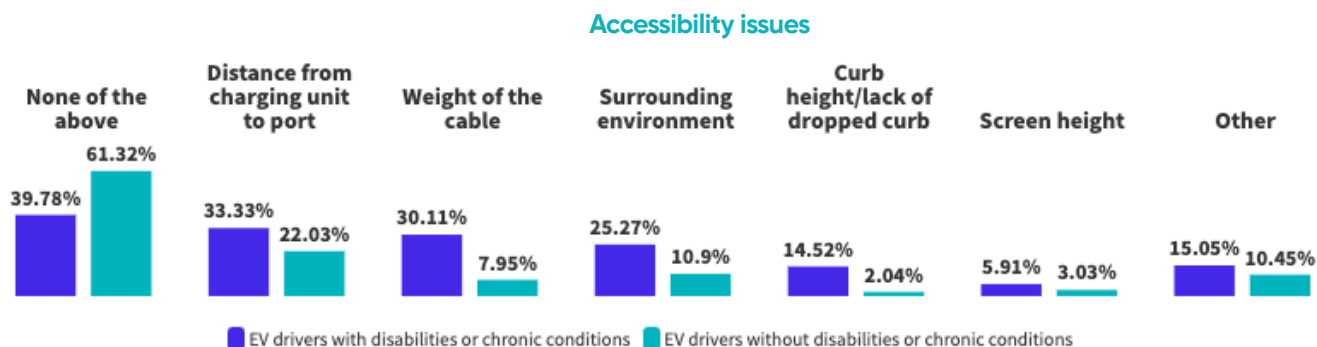
- Drivers residing in urban areas are more than twice as likely to charge their EV more than once per week.



<sup>9</sup> [Energy Saving Trust, 2023. Local Electric Vehicle Infrastructure \(LEVI\) Capital Fund Information Pack](#)  
<sup>10</sup> [Department for Transport, 2024. Guidance: Rapid Charging Fund](#)

## 2. Accessibility

An ongoing major concern for our current national infrastructure is found in its near complete inability to consistently meet the needs of disabled drivers. Currently, just 2.3% of public charge points in the UK are considered fully accessible<sup>11</sup>.



In our survey, 13% of respondents identified as disabled. Of them, 60% reported encountering at least one issue when using a public charger, with 33% identifying the distance from charging unit to port as a key problem when using a public station. Additionally, 7% of disabled drivers reported having to leave a charging point due to accessibility issues in the last three months.

As an immediate step, the Government should consider mandating that all new charging installations adhere to PAS 1899 guidelines, the extensive and robust standard introduced in 2022 that would ensure charging points are accessible to all, yet is currently scarcely being followed owing to its voluntary basis<sup>12</sup>.



### What is PAS 1899?

PAS 1899 sets out the minimum specifications for accessible public charge points, to ensure they are accessible for all users. It was produced by the British Standards Institution and co-sponsored by the Motability Foundation, the charity for drivers with disabilities, and the UK Government's Office for Zero Emission Vehicles.

Some of the specifications the standard has provided detailed requirements for include:

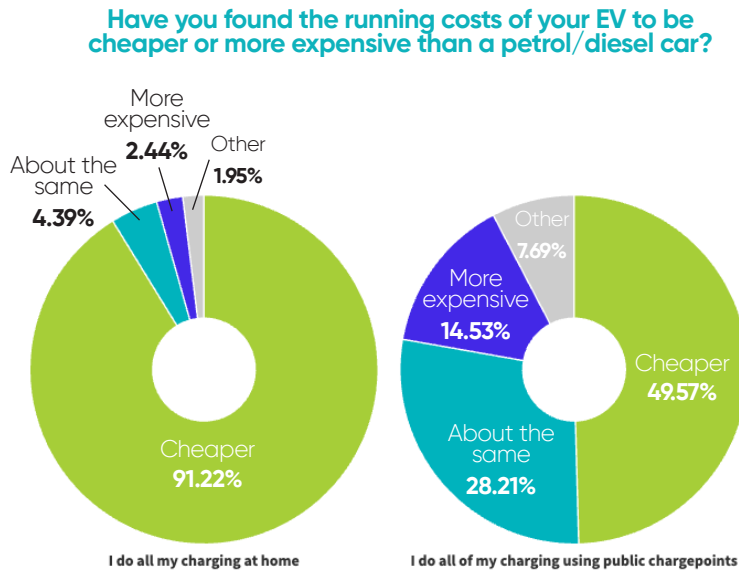
- the placement of charge points
- the height of charge points
- the weight of the cables

<sup>11</sup> [Motor Trader, 2024. Only 2.3% of UK chargers accessible for motorists with disabilities](#)

<sup>12</sup> [Renewable Energy Association, 2024. Calls for mandating accessible electric vehicle charging infrastructure continue to grow with government urged to act](#)

### 3. Address high public charging costs

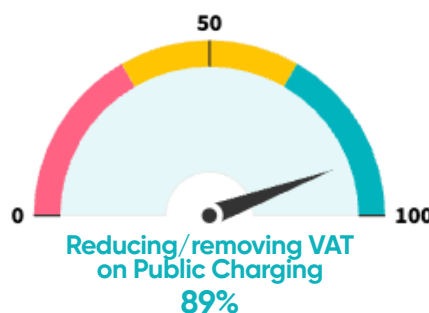
The biggest chink in the armour for the sector is the cost of public charging. It is telling that, while 91% of drivers who charge mostly at home find EVs cheaper to run, only half of drivers who only rely on the public network would agree.



There is indeed a stark difference between charging at home and in public. With the former, charging at night when rates are especially low can be as low as 7p per kWh, more than ten times lower than the 79p average on the public network when using a rapid or ultrarapid charger<sup>13</sup>.

It is perhaps no surprise, then, to find a noticeable difference in attitudes between 'public charging only' drivers and others when choosing a chargepoint: location is comfortably the leading factor for most drivers; look to those only charging publicly, however, and cost is much more often a part of the equation, roughly on par with location.

Most resoundingly, just under 9 in 10 of respondents have renewed their calls to either remove or reduce VAT on public charging points – currently applied at the full 20% in public, down to 5% at home.



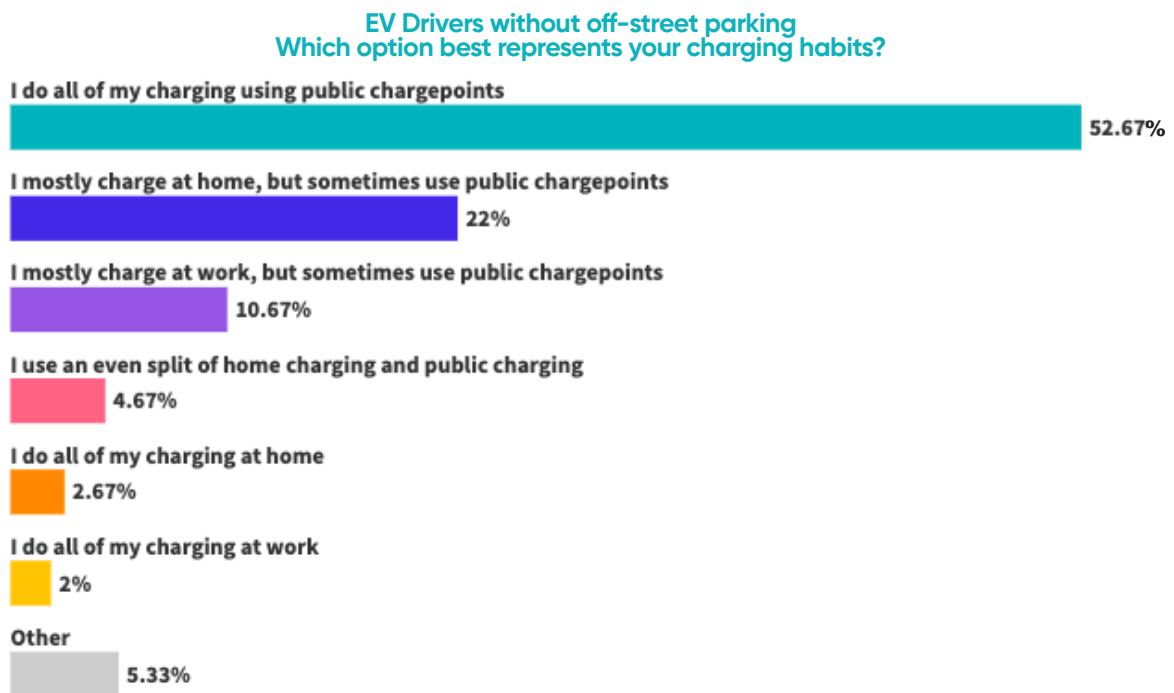
<sup>13</sup> Which, 2024. How much does it cost to charge an electric car?

# Grant more drivers the 'Right to Charge'

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Currently, a staggering 53% of drivers who do not own driveways do all of their charging using the public network, compared to just 8% among wider respondents.

As EVs continue taking up a larger section of the car market, the proportion of drivers without access to a private driveway and, therefore, with fewer options to charge at home, will inevitably increase. This will put further pressure on the public charging network, meaning a broader mix of charging solutions are needed beyond public offerings.



In the policy section of our survey, we found that drivers are resoundingly in favour of measures that would allow an expansion of so-called 'destination' and 'home' charging points. These are both essential components of the national charging mix as more EV drivers means both more charging demand and an increasingly complex set of charging needs.

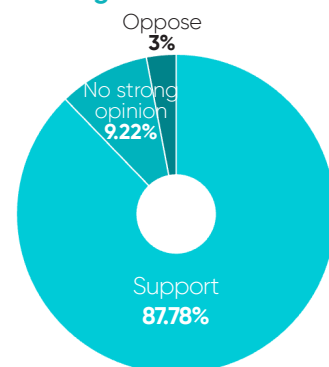
In a context of severe budgetary constraint for the current Government, many policy solutions in this area are 'zero-cost', in simply freeing up regulatory 'red tape' and enabling private investment.

## Some possible solutions

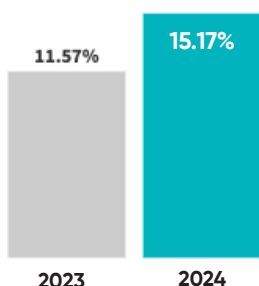
### Home charging

88% of respondents are in favour of removing regulatory restrictions around gully installations. A technological solution allowing drivers without off-street parking to connect their home charger to the curb safely, the installation of gullies is currently not allowed in most local authorities in England bar a select few 'trial' areas. Removing such a barrier would provide an immediate alternative to public charging for drivers without a private driveway.

### Allow homes near pavement parking to install gullies



### New EV drivers who are tenants



### Renters' rights

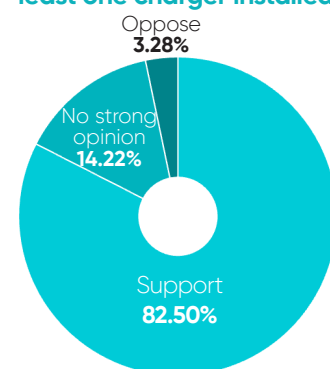
Action is needed, also, to support the growing number of EV drivers who rent their property – we have seen a 30% increase in tenants among newer drivers this year. Drivers in rented accommodation are faced with the additional barrier of needing permission from the landlord to install a home charging point. As first measure to tackle this growing barrier to access, EVA England is calling for the 'Right to Charge' to become an inherent part of presumptive tenancy agreements, granting tenants the right to install a charger at their own cost.

### Workplace charging

It is worth noting that the third largest category of charging habits in our survey was composed of drivers who mostly charge at work.

Another simple, no-cost policy measure the Government could consider in this area would be to mandate larger businesses with 10 or more existing parking spaces to provide at least one EV charger. Such a measure could look similar to the Home Charging Regulations introduced in 2021, mandating major property renovations including 10 or more parking spaces to include at least one EV charger. 82% of survey respondents were in favour of this measure.

### Mandate all business with more than 10 dedicated parking spaces to have at least one charger installed



# Conclusion

## The Great EV Charging Report 2024

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This year's iteration of the Great EV Charging Survey has allowed us unprecedented insight into the year-on-year progress in the sector: specifically, how drivers are responding to the important changes the sector is currently undergoing in a bid to attract more uptake and ensure the charging network is able to adapt to a growing and diversifying demand.

Thanks to the feedback from drivers, this report has enabled us to draw the following five conclusions:

### **1. Drivers are standing firm against misinformation**

Overwhelmingly high satisfaction rates and the majority of EV drivers continuing to find EVs cheaper than petrol or diesel has reinforced the sector's standing amid continued misinformation campaigns.

### **2. Demand is diversifying**

EV drivers are now more representative of the average consumer. 58% of new drivers reported cost as the main incentive for switching this year, meaning EVs are increasingly considered as a consumer product like any other.

We also noted a change in demographics in our survey with an increase in female respondents and a lower median income bracket. For policy makers, the key takeaway is the strong proportion of drivers sourcing their EV via the second-hand market and through employer-led schemes such as BiK and Salary Sacrifice.

### **3. Public Charging is improving**

Drivers have noticed the increased provision in public charging, with so-called 'charging anxiety' again down year-on-year among EV drivers. Accelerating the rollout of national public charging infrastructure was signposted as a headline commitment in the EV space for the new Labour Government; the Climate Change Committee noted earlier this year that, whilst progress in this area was on track, the current pace of new installations would need to treble if the UK was to meet its 2030 deadline to have 300,000 public chargers on the network.

There remains one noticeable gap in provision in that a majority of public charging points are not deemed sufficiently accessible for disabled drivers. PAS 1899 requirements – the framework guiding accessibility requirements at charging points – are currently guidelines only and not mandatory, and as a result are not being sufficiently adhered to.

### 4. Public charging costs remain high

Despite major improvements in the public network, drivers are still finding public charging costs too expensive. The average petrol and diesel car currently runs at an approximate cost of 16p–17p per mile, markedly higher than the estimated 6p per mile afforded by, on average, an EV home charger. Switch to a rapid or ultra-rapid charger on the public network, however, and the cost per mile jumps to 24p per mile, on average<sup>14</sup>. This is an important consideration amid the national infrastructure rollout effort: further unlocking the charging supply can help address the current imbalance in costs as immediate concern to keeping charging costs fair and affordable.

### 5. There is a growing charging divide

Among our respondents, EV drivers without access to off-street parking were an outlier across the board: whilst broadly satisfied, they are statistically less confident in the charging network and the EV experience.

For example, there is a stark divide between drivers who mostly charge at home and those solely reliant on the public network: 9 in 10 among the former find EVs cheaper to run, but only half among the latter agree. This contrast in the EV experience is only set to grow as more drivers rely on the public network and fewer have access to means of charging privately; a consequence, for instance, of the expansion of EVs within condensed urban environments.

### What we need to see next

- **Avoiding a slump in demand:** The market is showing strong signs of growth, but misinformation and cost considerations (the rising cost of insurance, for example), means continued input on the sector is needed. Low-cost, targeted schemes would help reach sections of the population that have not considered EVs so far, whilst employer-led tax and leasing incentives should continue as an important driver of the sector.
- **Reinforcing public charging:** Increased access to public charging, at fair costs, is now key considering the strides on the demand side. Regulatory barriers are currently holding the sector back from the pools of private funds waiting to be invested in the public charging network.
- **Democratising private charging:** EVs uniquely differ from petrol in offering an exciting, wide range of solutions to 'filling up'. As we see more drivers without off-street parking making the switch, more attention is needed on 'home' and 'destination' charging as a key solution to avoiding pressure on the public network and keeping charging fair.

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<sup>14</sup> [RAC, 2024. Electric car charging prices at public rapid chargers](#)