

AA

WHAT DO DRIVERS WANT FROM THE EV TRANSITION?



AA

AA Viewpoint Sustainable future Supporting drivers

Contents

Introduction

from our CEO _____ p.3

1 What is happening with the
EV transition? _____ p.4

2 What is needed to make the transition
work for drivers? _____ p.5

3 Conclusion - what do drivers
want? _____ p.13

4 Appendix: About the AA _____ p.15

5 EV Research: Insight summary _____ p.16

6 Sources _____ p.18

7 Contact _____ p.18

INTRODUCTION

WHAT DO DRIVERS WANT?



Jakob Pfaudler, Chief Executive Officer, The AA

The AA's purpose is to create confidence for drivers now and for the future. The AA has been at the forefront of driving since its inception 120 years ago - opening the first filling station and erecting the first road signs and over the years becoming the voice of the driver in the UK.

As the transition to electric vehicles reshapes the driving landscape, The AA remains committed to guiding this change, ensuring drivers are both informed and represented.

We have over 14 million members and actively engage with them to understand their needs and concerns through the entire driving lifecycle. This includes learning to drive, getting on the road, vehicle repair and maintenance, and buying and selling a vehicle. These insights inform our business decisions, as well as the policies we put forward to government.

No-one else has this full view and we are already at the heart of making the transition work across

our business every day. We know drivers are having to navigate a complex system with this transition. Our insight and practical, on-the-ground experience means we know what's driving EV buying behaviour and the challenges around insurance and maintenance and repair. We know this from our data and from the millions of customer interactions we have every year.

This is our view on what it will take for the UK to get this transition right.

1 What is happening with the EV transition?

Changing consumer behaviour needs a consumer focused approach. Unusually, the zero emission vehicle (ZEV) mandate does the opposite. It changes the supply side of car production without much attention to demand. The assumption is that demand will follow supply and that the market will find its own path to equilibrium.

The main focus of the transition has been on changing how carmakers produce and sell vehicles. However, carmakers are struggling due to low demand. Unfortunately many drivers have been left behind in this process. Understanding the driver's viewpoint is crucial to making real progress.

Our research shows a wide range of driver views on EVs. Some drivers completely reject them, while others are enthusiastic supporters. In between, we see drivers who moved to an EV and now

feel abandoned in their navigation of a confusing EV landscape; drivers who are nervous and sceptical that EV will ever work for them and drivers who are influenced by negative stories they have heard from friends, families, neighbours or media.

The AA is a unique and highly trusted source of support for drivers and we are working hard to assist them, but we can't do it alone. We believe the government and others can do more to provide reassurance and build the ecosystem that will support a better transition for all drivers.

The transition needs to be understood from a driver's perspective to identify why moving to an EV is difficult for many drivers. We want the transition to work. That's why we have set out concrete proposals for how we get it back on track.



2 What is needed to make the transition work for drivers?

As the UK's largest motoring organisation, we have completed our own extensive analysis and research on driver concerns, their needs, and what it would take to increase their demand for EVs.

Our research has revealed that across the population there are four types of driver when it comes to the EV transition: Rejectors, Doubters, Potentials and Adopters. Each of these types require different interventions to support them (see table).

The challenge shouldn't be underestimated: our research shows only 20% of all drivers changing car in the next 5 years are quite likely to consider an EV but are also considering a petrol or hybrid car. The Government has consulted on the ZEV mandate in the EV transition but has tightly bound the exercise to consider primarily the car industry's obligations and technical manufacturing specs.

The process should also be used as a window to get the whole transition back on track for drivers.

We must acknowledge some inconvenient truths about this transition. First, much EV uptake today has come from fleet ownership where cost, insurance and maintenance is managed for drivers. As we push more drivers to EVs without the support that comes with company cars, the demand side will get even tougher. Second, Government should recognise that the whole driver population will be impacted in the next few years by the ZEV mandate. Drivers will not be able to buy new ICE cars and at some point, all ICE costs will go up in terms of used car prices, parts and maintenance. Third, as it stands today, the poor resale value of an electric car means buying one is not a very smart financial decision and drivers know this.

So, it's time to get serious about the demand side. We at The AA therefore outline fresh proposals to get demand for EVs back on track and thus deliver the EV transition in a way that works for all. Our proposals are backed by driver research and market analysis.

Group	Who they are (% is proportion of our research sample)	What they say
Rejectors	The 22% of drivers who are unlikely to ever get an EV	"I am against EVs"
Doubters	The 20% of drivers who are neutral or unlikely to get an EV as their next car and are not sure about getting one in the future	"I will stick with my petrol/diesel car as long as I can"
Potentials	The 52% of drivers who claim to be likely / very likely to get an EV as their next car, either within the next 5 years or after that	"I'm worried about price and range"
Adopters	The 7% of drivers that already own or drive an EV, or have driven one in the past	"Improvements in the experience are still needed"

i) **Launch an EV DRIVE UK Public Awareness Campaign**

Drivers need to be brought along on this journey, rather than just having their choice taken away in the next five years. EV driving needs to be desirable, not just unavoidable, and currently the case is not compelling for most ICE drivers. The good news is that much can be done to re-frame the view of EVs in the eyes of the public. Our research shows a nuanced picture for the different driver groups:

"Doubters" and "Rejectors" are firmly against EV but few have any direct experience of them. They are going to need more support, better information and guidance that steps them through the journey gradually. Interestingly, they would consider hybrids.

"Potentials" are concerned about cost and range, primarily. They are right on cost but less so on range. Our operational experience of EVs shows that

“running out of charge” is almost no more likely than running out of fuel. Fears about being stranded on the side of the road, or chargepoints not working, or needing specific EV breakdown cover are not needed, with 70% of breakdown cover in the market including EV cover as standard. Yet we need to accept this perception is real.



What the data tells us



- AA roadside callout data shows that the percentage running out of charge is similar to running out of fuel. In 2024 just 1.85% of all EV breakdowns were due to running out of charge compared to approximately 1% of ICE vehicles running out of fuel
- Our breakdown data and insight from European clubs shows EVs are no more likely to breakdown than ICE cars
- The AA has been assisting a number of EV charging providers for the last five years, with 24/7 telephone and remote technical support for their network. For the providers we support, most queries and faults can be resolved remotely, with 95% of cases fixed on the phone

i) **Launch an EV DRIVE UK Public Awareness Campaign (cont.)**

EV "Adopters" often feel abandoned in navigating life as an EV driver, believing there is little support for those 'trying to do the right thing,' especially when the market is still developing. Many find EV ownership complicated, which inevitably makes it difficult to build strong advocacy for the transition. We therefore propose that the Government coordinate a public awareness campaign directly targeted at the expressed doubts and needs of different driver segments. The AA would happily play our part in such a campaign given that all our evidence shows that drivers are desperate for impartial information and guidance.

The Government ended its joint campaign with industry to promote EV uptake, yet this approach is needed now more than ever. A new campaign could bring together Government, motoring groups, industry, and consumer

organisations to provide accurate and impartial information, supported by Think!-style publicity campaigns. Even better still, it could give thousands of "Potentials" the chance to experience EVs firsthand at various locations.



What our research tells us



- 52% of drivers are "Potential" adopters of EVs, saying they're quite or very likely to get one as their next car in 5 years, but even within this group, ICE and hybrids are also considered. Despite considering EVs, they remain concerned about cost of ownership and range and are looking for reliable sources of information to help them make the right decision for them
- 20% of drivers are "Doubters" feeling neutral to negatively towards EVs and could be persuaded or influenced by either a campaign or broader adoption by their friends, family and neighbours
- "Rejectors", at 22% of drivers are more resistant with many saying "nothing" could convince them to get an EV
- 7% of drivers already drive EVs but we do not see unequivocal advocacy in this group. Recommendations are cautious, considered and recognise that EV is not for everyone yet
- Qualitative feedback from EV drivers indicates a feeling of abandonment – that they have tried to do 'the right thing' and have had to navigate complex and fragmented infrastructure with no help from government, who are mandating the change

ii) **Facilitate the path towards cost parity**

Drivers have to pay significantly more for a new EV than an ICE car. The full extent of this difference is cushioned by the fact that many "Adopters" have company car policies or have benefited from government tax subsidies.

For "Potentials", who claim they are quite likely to get an EV within the next five years, upfront costs are one of the biggest barriers to doing so. For this critical 'early majority' group, Government should identify policy measures that will incentivise manufacturers to produce and sell cheaper models or allow cheaper imports. The Government should also re-think targeted financial support for drivers, such as loans or tax breaks for EVs and home charging. If new cars aren't made more affordable, potential buyers will turn to the second-hand market, which won't have enough supply if new car sales don't increase.



What the data tells us



- Q1 of 2024 average cost of a new EV was £59,216, and £46,991 for petrol
- EVs make up 2% of the second-hand car market, but are seeing significant growth (up 63% in H1 2024)

What our research tells us

- For "Potentials", 55% said upfront price is a barrier to going EV; late majority also quoted cost as an issue
- 41% of drivers spontaneously cite expense as a negative of EVs
- Qualitative responses indicate a sense that government has removed incentives to purchase an EV, with home charger support withdrawal quoted as a proof point



For "Potentials" 55% said upfront price is a barrier to going to EV

iii) **Boost the second-hand market for EV**

Given the new car price premiums, it's vital in the near term that the EV second-hand market works better.

Although second-hand EV sales are rising rapidly as a proportion of all sales, the absolute percentage of second-hand EV vehicles sold is still very low at 2%. Drivers lack confidence in assessing the quality of a used EV compared to an ICE car which is putting off some purchasers. Our research shows that the second-hand market is particularly important for the "Doubters" and "Rejectors", who are far more likely to own a used car than the other segments.

At the heart of the EV second-hand market problem is that the residual value of an EV has been dropping considerably more than an equivalent ICE vehicle. This low residual value does not only affect the second-hand market, it also increases

leasing costs for new EVs and insurance, both of which are pegged to vehicle residual value.

The Government proposed battery health passports in their manifesto, and this is an idea worth pursuing. The AA has certified second hand vehicles for years and with EV battery health a source of stress for drivers, we should explore together how to take away this concern.

AA Cars used EV examples

Model	Price
PEUGEOT E-2008	£14,995
Peugeot E-208	£13,500
Vauxhall Mokka-e	£15,200
Mini Hatch	£13,699

What the data tells us



- EVs make up 2% of the second-hand car market, but are seeing significant growth (up 63% in H1 2024)
- Electric Vehicles' Cost of charging report showed that 8 out of 10 used EVs are at price parity to their ICE model equivalent
- In total, Autotrader states the average used EV price is £26,139, down -10.6% yoy as at January 2025
- Autotrader shares that whilst demand is growing for EVs, supply is outstripping it causing further pressure on prices
- BVRLA states there has been a 60% decline in used EV prices since 2022

What our research tells us

- The "Doubter" and "Rejector" driver groups are the most likely to buy second hand (52% and 55% respectively)
- Qualitative responses indicate low confidence in battery health and longevity:
 - "...too expensive, no resale value, no second hand market..."
 - "Way too expensive poor resale values due to battery degradation"
 - "...resale value problem due to short battery life"

iv) **Allow new plug-in hybrids between 2030 and 2035**

The ideal policy for environmental reasons is a move to full EVs but our research indicates that for 'Doubters' the timeframe of the ZEV mandate will be far too short for them to make that switch.

Given the strength of negative feeling towards EVs in this group, there is a good case for plug-in hybrids as these can be a stepping stone for consumers still lacking the confidence to go full electric. Having a plug-in gets consumers used to charging and hybrids are more affordable than EVs now. Our recently completed research showed that nearly 40% of all drivers would be very hesitant or totally reject moving to an EV, but one in five of these drivers would consider a hybrid as their next car.

However, for this policy to be effective more needs to be done to help the approximate 40% without access to off-street parking and therefore home charging. Until those measures are implemented, full hybrids with a decent electric range - which don't plug-in - should also be considered.



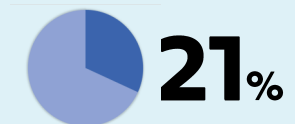
What the data tells us



- The cheapest new hybrid vehicle in 2025 is the MG3 – from £18,495
- As hybrids utilise both ICE and EV technology, they are less likely to breakdown than petrol or diesel cars. However over time, they will not provide the reduced servicing costs that EVs offer

What our research tells us

- 41% of drivers in our research were very hesitant or totally reject moving to EV
- Hybrids would be considered by all driver groups, and of the 22% of drivers who are hard "Rejectors", 21% would consider a hybrid vehicle



“Rejectors” would consider a hybrid vehicle

v) ***Prioritise charging visibility as well as sufficiency***

We know that charging is one of the main concerns for both "Potential" drivers and "Adopters" so we need to think differently about what will change driver experience and perception. Policymakers may say that there is now - or soon will be - sufficient charging available but that is not the driver experience nor perception.

For "Adopters", the reliability of the network is key, with many experiencing charging problems. The number of chargers isn't enough on its own. They need to be working and the data accurate on their status to allow drivers to plan their journeys effectively. It is worth noting that in our research "Adopters" cited home charging the most when asked what their advice would be on making the transition, with on-street charging seen as inconvenient and expensive. Providing viable and affordable charging solutions for the nearly 40% of drivers without off-street parking will therefore be critical.

For "Potentials" the visibility of charging is a key challenge. Drivers simply don't think there are sufficient chargers because they don't see them frequently enough or believe they will be there when needed. Smart Data for automotive could make a big difference: it would allow greater visibility of chargers and their status, as well as accurate estimates of how long drivers need to charge to complete their journeys. It would also give commercial providers and local authorities vital data on infrastructure gaps and performance.

Finally, the UK's outdated road signage rules are actively hindering electric vehicle adoption. Under current regulations and guidance, only service areas with petrol pumps can include EV charging on their signage - and even then, practical constraints mean just 25 motorway locations have managed to install signs. This should be changed as soon as possible but in the meantime The AA can help in some circumstances with temporary signs.

What the data tells us



- 40% drivers don't have access to home charging with current solutions
- The Government is on track to reach its target of 300,000 publicly available chargers by 2030

What our research tells us

- Drivers felt the number of publicly available chargers needed to be 27% higher than the Government's target (380,000 chargers) to make the feel reassured
- 72% of drivers spontaneously cite 'inconvenience' as a disadvantage of EVs (the most commonly cited reason in our research across all groups)
- Current EV drivers ("Adopters") strongly view home charging as essential for both cost and convenience
- 56% of drivers say steps such as a clearer, universal sign should be used to help chargers stand out such as totem pole pricing boards used at fuel forecourts and including chargepoints on built-in sat navs
- "Potentials" cite cheaper home chargers (53%) and battery health guarantees (49%) as the things most likely to convince them to switch to EV when they change car

vi) *Enhance the secondary aspects of EV driving*

In our research, "Adopters" are mostly proud to be EV drivers but feel it comes with some sacrifice. They are therefore not unquestioning advocates of EVs to "Potentials" and "Doubters". Their reflections on ownership are usually cautious and qualified.

Changing this does require tackling price issues and charging infrastructure. But they also tell us about all the other system support functions that penalise the EV driver. These include lack of resale value, high insurance costs, parts and maintenance delays. EV drivers in fleet schemes are protected from some of these pains. But EV drivers outside of fleets are sending a clear signal. We need more individual consumers to buy EVs and we need a far more seamless and affordable system for owning an EV that currently exists today.



What the data tells us



- There were 1.36m EV cars on the roads in December 2024.
- Approximately 222,000 individuals were driving EVs through company car schemes

What our research tells us

- Drivers were unsure of the support available to them as an EV driver when they need maintenance or repair. Most assumed they would need to go back to their dealer as local garages wouldn't be skilled to work on an EV
- Those who had company cars admitted they had no idea of the support for repair, as the lease company managed all of this for them

3 CONCLUSION

WHAT DO DRIVERS WANT?

Climate change is a critical global challenge in which transport plays a vital part. Our members recognise the need to reduce emissions, noise pollution and improve air quality, but are uncertain about how far and how fast they can change without the support in the right place.

In essence, most drivers are hesitant but not hostile to change. But some twenty percent are "Rejectors" who don't contemplate ever getting an EV.

Our research shows how we need to look beyond the ZEV mandate which is regulating supply and concentrate on how we can improve demand with more equitable policies and better information. There is a legitimate role for government and indeed The AA.

AA Motoring Manifesto incentives

In our Motoring Manifesto published last year, we called for various incentives to help the transition and our current research and analysis indicates these are still needed to stimulate demand.

Level up on EV charging: Reduce VAT for on-street charging from 20% to match VAT for home charging at 5%. This should help those without off-street parking.

Support charge point operators (CPOs): Bringing electric charging under the Renewable Transport Fuel Obligation (RTFO) is something the CPOs believe should speed up the roll-out of their infrastructure. RTFO guidance provides support for fuel suppliers, independent verifiers and others involved in the supply of fossil and

renewable fuels for use in relevant transport modes in the UK.

Accessible charge points: Give incentive to CPOs and landowners to ensure all charge points are accessible for mobility impaired drivers. The PAS 1899 standard, published in October 2022, provides industry with a clear specification for making charge points accessible. As the criteria may require more space for wheelchair access etc incentives are needed.

Introduce EV sales incentives: Introduce targeted EV incentives like 0% loans on used EVs (as was the case in Scotland), as well as targeted or broader means-tested incentives to help uptake of EVs – like scrappage schemes.

3 CONCLUSION

WHAT DO DRIVERS WANT? (CONT.)

Information campaigns: Drivers want accurate and impartial information on EVs to help them make informed decisions about when and how to switch. We call on the Government to consider reinstating the Go Ultra Low joint industry and Government information and publicity campaign. ongoing safety of these vehicles.



In addition, our new research suggests the need to:

- Lower new EV purchase prices
- Boost the second-hand EV market
- Introduce battery health checks
- Enhance the lifecycle of EV driving to consider insurance and repairs
- Allow efficient hybrids between 2030-2035
- Make it easier to signpost chargers
- Speed up roll-out and efficiency of chargers

These changes and incentives are vital to stimulate demand; keep drivers onside; and help a smooth transition by more closely matching supply and demand.

The AA is here to help.

Appendix

About the AA

The AA is the UK's leading provider of roadside assistance serving 14 million members with approximately 2,700 patrols attending an average of 9,000 breakdowns daily. We are rated by drivers as the first choice for electric vehicle breakdown, with the best trained breakdown assistance workforce providing national coverage for EV assistance. We have the largest EV trained workforce in Europe and are dedicated to ensuring our patrols are EV ready. All of our patrol force is EV Level 1 trained, and we refresh knowledge every 5 years. Some 99% of our patrol force are Level 2 EV trained. We dealt with 150,000 EV breakdowns last year which represents just over 4% of our workload and we fix more than 88% of EVs at the roadside.

Despite driver concern about “running out of charge”, we actually see fewer than 2% of EV breakdowns due to the vehicle being ‘out of charge’, which is trending down to the figure we see for internal combustion engine (ICE) vehicles running out of fuel. We also provide customer support to the majority of the leading charge post operators, giving us further insight into the challenges and opportunities of our charging infrastructure.

For our own fleet, we have an ambitious programme to 'test and scale' an array of alternative fuel vehicles from full electric recovery vehicles, plug-in hybrid vans and expanding our use of hydrotreated vegetable oil (HVO) instead of diesel.

The AA's mission is to create confidence for drivers now and for the future – anticipating drivers' needs since 1905 and striving to be always ahead. The AA provides services across its roadside businesses from AA Driving School and BSM, to DriveTech, the leader in driver education. In addition, AA Smart Care provides bookings for MOTs, maintenance, service and repair in AA certified garages. AA Cars is a trusted vendor of used cars with free history checks and breakdown cover. The AA's insurance broker offers motor and home policies, operating a diverse panel of underwriters including the AA's in-house underwriter, plus AA Financial Services and Accident Assist. The AA continues to invest in connected car innovation and digital services.

EV Research:

Insight Summary

Introduction

The AA has conducted extensive research to understand the EV transition from a driver's perspective, covering various aspects of the driver lifecycle, including learning to drive, buying, owning, driving, maintaining, and selling a car.

The research process involved online triads, group discussions, and a quantitative survey with a representative sample of car drivers.

Consumer awareness and feelings on the transition to electric vehicles

Awareness of the upcoming ban on ICE vehicles is not universal, with only half of drivers aware of it

- Many drivers don't appreciate that as the ban nears, fewer and fewer ICE cars will be available for sale
- There are misunderstandings over the impact of the ZEV mandate:
 - 17% think fuel duty will be increased on petrol / diesel cars each year
 - 16% think car tax will be increased on petrol / diesel cars each year
 - 7% think the sale of all petrol and diesel cars including used will be banned

We have predicted the adoption curve over the next 5 – 15 years based on:

- Perceptions of EVs amongst drivers – whether they would consider getting one as their next car or in the future
- Whether drivers are thinking of getting their next car in the next 5 years or longer

Our expected adoption curve for EVs over the next 5 years is less than the Government expects, with a large group of active "Rejectors"

- 50% of drivers are very, quite or likely to get an EV as their next car, in the next five years or when they next change ("Potentials")
- C.20% are neutral to unlikely to get an EV as their next car and are not sure about getting one in the future ("Doubters")
- C.22% are outright rejectors – not wanting an EV as their next car or at all ("Rejectors")
- 7% of drivers already have an EV ("Adopters")

Drivers who are "Doubters" or "Rejectors" tend to be:

- One car households
- Used car buyers with a lower budget, holding onto their cars for slightly longer
- An older driver living in a more rural area

When we interviewed drivers, many are feeling the pace of change ramping up, although this comes with some nervousness and pressure

- "It's a choice we're all going to have to make. It's coming around so quick"
- "I'm feeling a little bit shoved into it, with the government legislation. I am hesitant. I need to make a really informed decision on everything I do. I'm not impulsive, so it worries me I don't know enough about it"
- "I'm really worried about being able to afford

vehicles. I honestly believe that only people of a certain income bracket will be able to afford them"

- "I feel like electric is growing on me... But there's come caution and concern as well. It's a new technology"

Understanding the barriers to adoption

Exposure and understanding

Total knowledge about EVs remains low

- Although all EVs are automatic, around a third of drivers, regardless of whether they were considering an EV or not, think they are available as a manual car
- Our qualitative research included multiple comments about just not knowing enough or knowing where to find information

Among ICE drivers, 73% have no experience of EVs at all

- For those considering an EV car as their next purchase – c.50% have driven one temporarily, so have some exposure
- For rejectors, only 8% have experienced them as a car hire/ rental or a test drive

Whilst the "Rejectors" are less likely to have experienced an EV and more likely to have their views influenced by the media, it would be wrong to dismiss them. They often cite multiple barriers including environmental concerns:

- 'Weight, use of resources during manufacture, short range, limited range when cold, long charge times, dangerous battery, expensive repair bills,

limited re-sale value, short battery life.’

- ‘Expensive, very heavy so bad for roads, cannot charge near home, eco worries about the battery, lose value quickly’
- ‘Mining of the minerals required for the battery. Range anxiety’

EV perceptions

Our survey showed divided opinion on the pros and cons of EVs with strongly held opinions at both ends of the scale for many factors, for example:

- 20% of drivers think EVs are easier to drive vs 19% think EVs are harder to drive
- 27% of drivers think EVs are cheaper to run vs 23% think EVs are more expensive to run
- 17% of drivers think EVs are more likely to hold value vs 29% think EVs are more likely to lose value

Despite this, there remains a significant tranche of drivers unsure about the total cost of EV ownership, with qualitative responses reflecting the challenges of figuring out the point where an EV is more cost effective: “The upfront cost is higher than a conventional combustion engine. The running costs are lower, so it would require some maths to work out how long it would pay for itself. I think there were some subsidies, but there are multiple things to consider. It’s a question of how long until it’s cheaper than a fuel car”

Awareness that the technology continues to improve also supports the inclination to delay the decision to move and is linked to concerns that by the time an EV driver wants to switch cars, their EV will be “out of date” on range and/or battery health

For those that are most impacted by change or affordability, eking out “one more ICE car” to postpone more upheaval or change is attractive.

Measures to take

Key measures to take to support the transition are below, and it is important all of these are addressed to support the different needs of different driver groups:

- Lowering home installation costs
- Ensuring charging infrastructure is visible and more than sufficient – addressing the anxiety of there not being enough chargers
- Guarantees for battery health in addition to a consumer-friendly standard to understand battery health providing confidence to the used car market
- Supporting drivers to understand the total cost of ownership of an EV vs ICE
- Ensuring misinformation about EV is addressed, but the topic needs defusing and depoliticising. Information coming from trusted, peer to peer sources is likely to be more successful

For the “Potentials”, making home installation costs lower and establishing a standard for battery health were the clear imperatives:

- 53% would buy an EV if the home installation costs were lower
- 49% would buy an EV if the Government guaranteed the main EV battery for 8 years

The key difference between this group and drivers “likely” to move to an EV in the next five years was if the upfront cost was lower and if the range increased – showing the importance of supporting drivers to understand the tipping point where the costs of ownership for EVs are reduced and addressing range anxiety

A critical action to take to support the “Potentials” and “Doubters” adopting EVs is to support them with accurate, unbiased information on EV

ownership and experience

Among the “Rejectors”, improved range would make the biggest difference. However a significant proportion (43%) said that nothing was likely to encourage them to buy an EV, perhaps reflecting the economic challenge as only a quarter of these drivers would be able to afford an EV as their next car, with the budget for the next car being <£15,000

This highlights the challenge of addressing the used EV car market – where value matters more and the lack of an understandable, consistent battery health standard makes it harder for drivers to feel confident in making a purchase

Are existing EV drivers champions for the transition?

7% of the drivers surveyed were an EV owner/driver or past owner – our “Adopters”

- This is slightly above the percentage of breakdowns from EVs we see and our internal analysis on the UK car parc based on historic car sales

“Adopters” don’t see themselves as innovators – even those who have had one for over three years are more likely to say “I got an EV quite early on, but I wasn’t one of the first in the UK” than “I was one of the very first to get an EV in the UK”

Not all are driven by the environmental aspects, they mention a range of advantages of owning:

- **Cost saving:** ‘Cheaper to charge rather than buy petrol. More charging points now available.’ ‘The cost of running it. The range is improving constantly. It’s better for the environment - and the upkeep is minimal.’
- **Driving experience:** ‘...Faster drive, pull away with no gears’, ‘EVs are so smooth, quiet. They’ve just got a nice drive. Now I feel anything else is quite clunky. You can tell the difference’, ‘My boys love

when you put your foot down. It's got a jet noise, almost. It's pretty quick. I notice that difference from my previous cars, it's quick off the mark'

- **Convenience:** 'You can charge it at home and it's cheaper than petrol', 'Being able to charge at home without visiting a petrol station.'
- **Less reliance on fossil fuel:** 'Reducing reliance on foreign powers that cause oil price fluctuations. Cleaner environment.'
- **Less noise pollution:** 'It has no noise pollution'; 'Quieter vehicle and less noisy'
- **Tax savings:** '...At present the road tax is nil so another benefit.'

They are advocates but far from evangelists, with many adopting a measured tone when describing their experiences:

- "Do all the necessary research first - ask lots of questions. Be careful buying a charger - some better than others"
- "Definitely invest in a home charger as soon as possible because it is extremely expensive to use public chargers compared to a home charger"
- "Understand how you will charge your new vehicle and if you can get a charger put in at home and a deal with your electric supplier. Research the car and understand your range needs. If you don't do long journeys you don't need excessive range"

A very small minority of EV drivers have already switched back to ICE, frustrated with the charging infrastructure

For most EV drivers, they feel let down by the lack of support from the Government.

- "You get so much hate online. People despise EVs. The media has a lot to answer for"
- There is also not always clarity on whether companies are ready to support them:
- "I'd probably have to think twice if I was getting it serviced. Would a normal garage do it? Would it have to be an electric specialist?"
- The lack of support most EV drivers feel they have from the Government and companies is likely to further temper their vocal support for the transition, which is critical to gaining momentum and convincing the other driver groups to consider it

Data Sources

The research supporting this document has been collated from The AA's operational data, collected up to 31 January 2025, The AA Yonder online poll conducted between the 14th to 21st January 2025 and our quantitative survey in field 25th October to 8th November 2024 and has been supplemented with qualitative research prior to and after this. Main sample was matched to ONS nationally representative samples for gender, age and location.

Assessment of Government's progress on charger network from the National Audit Office report dated 13 December 2024.

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Ahead*