

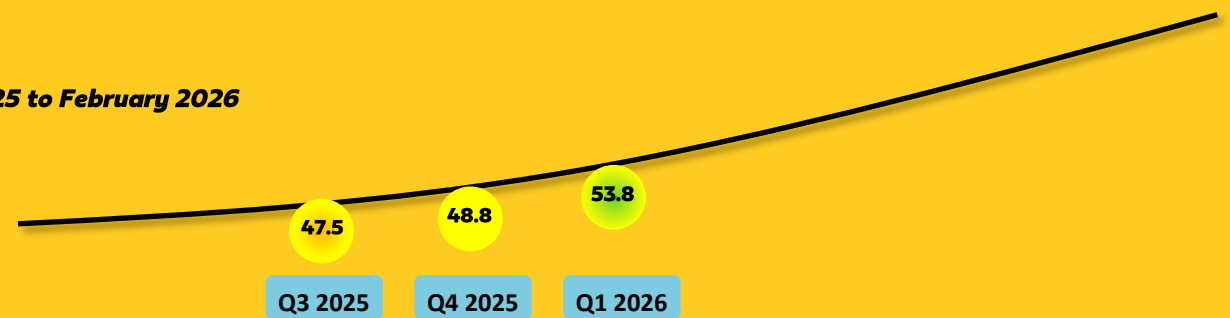
AA UK EV READINESS INDEX

Q1 2026

Assessing the factors
influencing drivers' readiness to
switch to electric vehicles



March 2026 *Data collected from December 2025 to February 2026*



Consumer confidence Sustainable future Supporting drivers

OPENING SUMMARY



Edmund King OBE. AA President

"Our AA UK EV Readiness Index shows that conditions for switching to electric cars are improving, with cheaper used EVs opening the door for more drivers. But the reality is that the transition remains fragile."

The AA's third UK EV Readiness Index highlights signs of progress on key consumer barriers to buying an EV, although structural market challenges continue to inhibit the EV transition.

The Index leverages The AA's proprietary data to track and analyse eight key factors influencing drivers' readiness to switch to EVs. The factors are combined into an overall "Readiness Rating", which offers a snapshot of how practical and appealing EV ownership is for drivers today.

The Q1 2026 Readiness Rating increased to 53.8 (Q4 2025: 48.8), indicating that while EVs are a good option for some drivers, significant barriers remain for mass adoption.

Improvement in the Readiness Rating was driven by falling prices for used EVs. The availability of a wider range of models at cheaper prices has lowered barriers to entry, with signs that demand is becoming more resilient as more drivers consider a switch.¹

While this is good news for motorists looking to buy now, demand remains below the levels required to drive a long-term transition. Without stronger consumer interest, current rates of depreciation raise concerns for fleet operators, who underpin the EV market by purchasing most new vehicles.

This edition's Quarterly Insight takes a closer look at EV demand, examining the 'confidence gap' in the used EV market. Despite attractive deals, many drivers remain hesitant to switch, lacking confidence in a range of issues from the lifetime value of an EV to using a charge station.

Addressing this gap will require targeted reassurances, like a government-backed battery health certificate, alongside accurate information to support consumer-driven demand.

Please note that the Q1 Index covers data from December to February and is therefore unaffected by the ongoing conflict in the Middle East. Fuel price inflation and volatility is a key concern for drivers, which will be covered in more detail in the next Index.

¹ SMMT reported growing used BEV demand in 2025, as sales increased by 45.7% and market share rose to 3.5% (2024: 2.5%).



KEY FINDINGS

The Q1 2026 EV Readiness Index highlights the key barriers to EV mass adoption, despite favourable conditions for some drivers looking to switch. The Index provides a 1-100 score across eight factors, with 1 denoting that barriers remain too high for all drivers, and 100 indicating that there are clear and significant advantages to owning an EV.

Upfront Costs | Average Score: 60 (Q4 2025: 50)

Upfront costs of EVs improved in the quarter, driven by a decrease in the cost of used EVs, which fell below the average price of ICE equivalents. Growing maturity in the insurance market also continued to offer good deals for some EV drivers.

The cost of new EVs remained stable at 26% higher (Q4: 28%) than petrol equivalents. However, falling market share of new EVs in January and February highlights the impact of consumer uncertainty, as mixed government policy weighs on the impact of the Electric Car Grant.

In Q1, used electric vehicles fell below the cost of ICE equivalents for the first time since the Index was launched in September 2025, highlighting the good deals on offer for drivers.

- Used-EVs were 10% cheaper than ICE equivalents, impacted by ex-fleet EVs reaching the used market, at the same time as manufacturers reduced new EV prices to stimulate demand.
- Depreciation on EVs continues to raise concerns for the longer-term health of the market, with knock-on impacts for fleet operators looking to purchase new EVs.

In insurance, there remained cheaper quotes for some EV drivers, underscoring growing maturity in parts of the insurance market.

- The Q1 Index data pre-dates the start of conflict in the Middle East, which could drive short-term servicing and parts inflation, compounding the mid-term impact of new EV launches in China.
- In the longer-term, maturing supply of parts, as well as better understanding of risk rates and repair costs, should support stable lower costs for average EV premiums.

Charging | Average Score: 43 (Q4 2025: 40)

Lower fuel prices impacted the relative cost-savings for EV drivers, although significant savings opportunities remain for drivers with access to home charging. A higher score for charger installations was supported by a change in reporting methodology by Zap Map and the Department for Transport, although public networks are still below the required scale for mass adoption.

Public ultra-rapid charging costs were stable but increased to 35% (Q4: 29%) more expensive than petrol equivalents due to a decline in fuel prices.

Home charging costs rose to 25% (Q4: 20%) more expensive per mile than petrol equivalents, accounting for the average

cost of financing home charger installation over a one-year period. Excluding installation costs, home charging was 57% (Q4: 60%) cheaper per mile than petrol equivalents, presenting significant savings opportunities.

In February 2026, Zap Map and DfT updated their reporting methodology for counting charger installations, shifting from 'devices' (a physical charging unit) to 'EV chargers' (an independent part of a charging device which enables one EV charge at a time).

- The Index has been updated to align with the shift, with 118,321 EV chargers installed to date, which is 39.4% of the Government's target for 300,000 charging points by 2030.

Upkeep | Average Score: 60 (Q4: 60)

EVs continue to compare favourably with petrol vehicles on upkeep and maintenance, despite seasonal impacts of cold weather on EV out of charge rates.

In breakdown incidents, EVs are more likely to be fixed at the roadside.

88.7% (Q4: 88.2%) of EV callouts were fixed at the roadside, compared with 86% (Q4: 85.1%) of petrol vehicles.

Running out of charge accounted for 1.5% (Q4: 1.7%) of all call outs, compared with 8.3% in 2015. The rate remains significantly below historic averages, as 'range anxiety' recedes as a major obstacle.



**Costs
Average
= 60 (+10)**



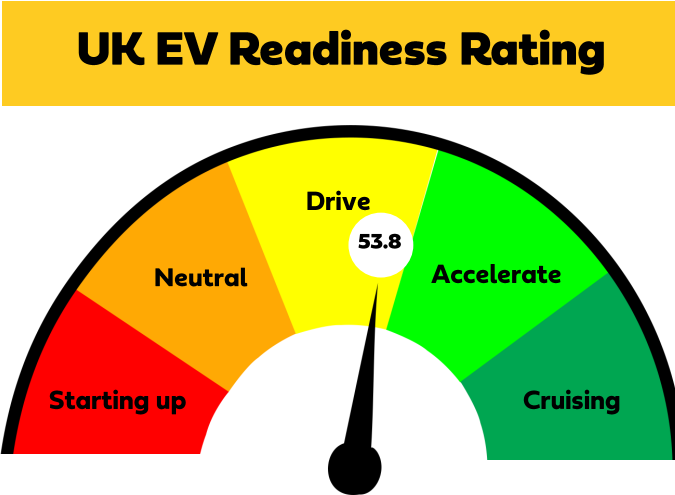
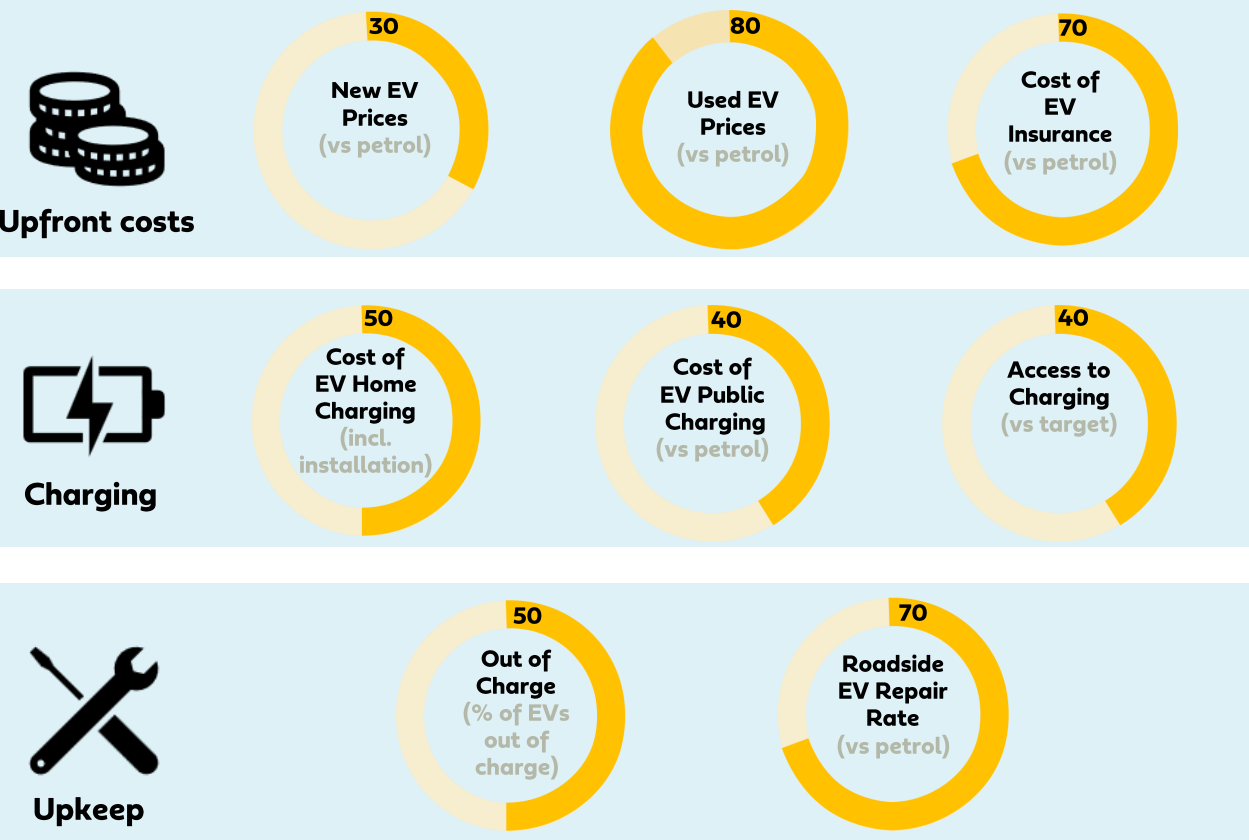
**Charging
Average
= 43 (+3)**



**Upkeep
Average
= 60 (flat)**

UK EV Readiness Index Q1 2026 Dashboard

The Index monitors eight critical factors that influence UK drivers' decisions to switch to EVs. The scores are combined to form an overall "UK EV Readiness Rating", which offers a snapshot of how practical and appealing EV ownership is for drivers today. Data collected from December 2025 to February 2026



Switching to an EV is now favourable for more drivers, but conditions need to improve to increase demand for mass adoption

Rating	0-20	21-40	41-60	61-80	81-100
Scoring Criteria	Barriers are too high for drivers	EV factors are unfavourable for the majority drivers	EV factors are clearly favourable for some drivers	Parity between EV and petrol ownership	There are clear and significant advantages to EV ownership

Quarterly Insight

Latest polling from The AA¹ finds that limited driver confidence and a lack of accurate information about EVs continues to weigh on demand.

Following government plans to introduce the eVED (a mileage-based tax on electric and plug-in hybrid cars) from April 2028, drivers who had been encouraged by clear purchase incentives are now questioning the long-term value of switching.

For the next phase of the transition, information and education will play a key role in supporting consumer-driven demand, particularly in the used car market, where a lack of confidence is outweighing the good deals available to drivers.

Key Findings

The confidence gap remains a key barrier to adoption

Only 3% of drivers are confident about buying a used EV, highlighting how a lack of trust in EVs is outweighing the attractiveness of falling prices.

The polling found that a “confidence gap” extends across a range of key factors that influence decision-making:

- 2% of drivers believe that the lifespan of an EV is longer than a petrol or diesel engine. This contrasts with recent research that shows EVs are lasting as long as petrol and diesel cars with a lifespan of 18.4 years.²
- 22% of drivers are confident that they would know how to charge an EV.
- 30% feel less confident about driving an EV versus a petrol or diesel car.

Without trust in basic EV functions, as well as battery health, resale value and long-term reliability, mainstream adoption will remain constrained.

Addressing this gap will require targeted reassurances, alongside accurate information to support consumer-driven demand. For example, polling found that a government-backed battery health certificate would make 38% of drivers more likely to buy a used electric car.



Lack of awareness reinforces EV cost myths

Consumer understanding of EV costs is lagging industry trends. 14% of drivers believe EVs cost less to run than petrol or diesel cars, despite falling maintenance, insurance and charging costs. Excluding home charger installation, The AA's Q1 EV Index found that domestic charging is 57% cheaper per mile than petrol equivalents, offering significant savings.

Only 25% of drivers are aware that some tariffs offer cheaper EV charging rates, which highlights the need for better education to help drivers make an informed decision about the benefits and limitations of switching to an EV.

AA research



3% of drivers are confident about buying a used electric car.



2% of drivers believe that the lifespan of an EV is longer than a petrol or diesel engine.



22% of drivers are confident that they would know how to charge an EV.



30% feel less confident about driving an EV versus a petrol or diesel car.

¹ Polling of 12,182 AA members conducted with Yonder. Data taken from respondents who do not own an electric vehicle as their main car.

² Nature Energy. (2025) [The closing longevity gap between battery electric vehicles and internal combustion vehicles in Great Britain.](#)

Appendix

The AA's UK EV Readiness Index provides a 1–100 score across eight factors which capture the real-world conditions influencing driver readiness for the switch to EVs. The scores reflect how close the UK is to an optimal environment for EV adoption, with 1 denoting that barriers remain too high for all drivers, and 100 indicating that there are clear and significant advantages to owning an EV.

Factors

1. New Car Prices

Although the majority of new EVs are purchased by fleet operators, the price of new EVs is an important indicator of broader trends in the technological maturity, manufacturing scale and market competitiveness of EVs. Lower entry prices also accelerate the flow of EVs into the second-hand market, which is an important driver of mass adoption. The Index uses OTR prices from OEM websites to compare the cost of EV and petrol variants across four models: Vauxhall Corsa, Hyundai KONA, Audi Q3/Q4 and Mercedes GLB / EQB.* The Index excludes manufacturer deals and includes discounts available through the Government's Electric Car Grant, where applicable.

2. Used Car Prices

Most car sales in the UK are for used cars. Consumers tell us that price parity is of importance to them, so tracking the cost of used EVs is beneficial for drivers. The Index uses proprietary data from AA Cars to compare the cost of used EV and petrol variants across four models: Vauxhall Corsa, Hyundai KONA, Audi Q3/Q4 and Mercedes GLB / EQB.

3. Cost of Insurance

Insuring a car is a legal requirement, but drivers are concerned about the 'on the road' costs of driving, including higher insurance premiums. The Index compares the average insurance premium price for electric vehicles and petrol cars across the quarter, using quotes via The AA's insurance broker service for The AA Silver motor insurance cover.

4. Cost of Home Charging

Drivers want to know how much it will cost them to 'refill' their cars and what is the most economic way to do so. Cost of Home Charging compares the cost of refuelling a petrol vehicle with the cost of charging an EV at home at the Ofgem energy price cap, across the four models in the Index. It also accounts for the cost of home charger installation, spread across a 12-month period.

5. Cost of Public Charging

Cost of Public Charging compares the cost of refuelling a petrol vehicle with the cost of charging an EV at an ultra-rapid charging station, across the four models in the Index.

6. Access to Charging

The Government has set a 'soft' target of 300,000 publicly available chargers by 2030. For drivers, having the ability to charge wherever they are on their journey is important, therefore tracking the progress of the public charging network is crucial to understand prospective adoption. The Index tracks the number of publicly available EV chargers as a percentage of the UK government's target.

7. Out of Charge

Drivers want to be able to get to their destinations as simply as possible. The Index uses a rolling 12-month average of AA breakdown data to track the number of jobs where an EV has run out of charge.

8. Roadside Repair Rate

The likelihood that a vehicle can be fixed at the roadside is an important indicator for drivers: high roadside repair rates improve confidence in vehicle reliability and reduce disruption and cost. The Index uses a rolling 12-month average of data from The AA's Roadside Service (RSS) to calculate a score from the difference between EV and petrol roadside repair rates.

Rating

Scoring Criteria

0-20	Barriers are too high for drivers
21-40	EV factors are unfavourable for the majority drivers
41-60	EV factors are clearly favourable for some drivers
61-80	Parity between EV and petrol ownership
81-100	There are clear and significant advantages to EV ownership

**The four models were selected to offer practical, real-world reference point for UK drivers. This enables like-for-like assessments, mitigating variables introduced by differing vehicle classes or specifications. The AA will review its benchmark vehicle selection every six months to ensure the Index continues to reflect the most appropriate and representative model for tracking the UK's EV transition.*

