

AA UK EV READINESS INDEX

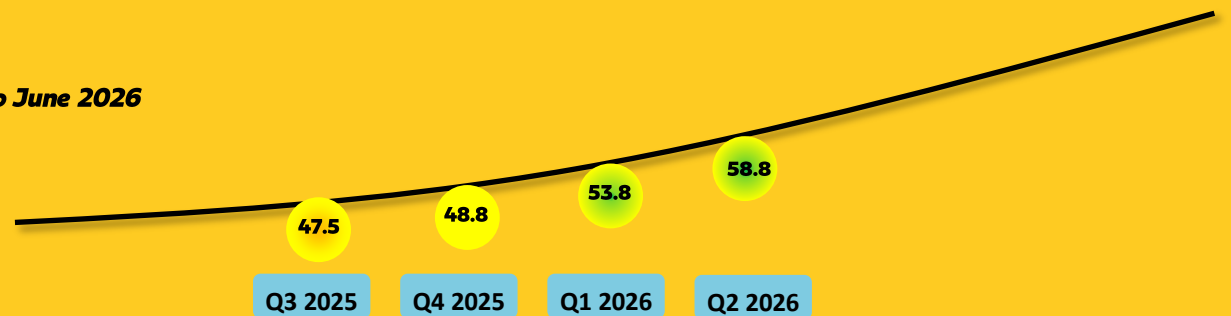
Q2 2026

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



June 2026

Data collected from March 2026 to June 2026



Consumer confidence Sustainable future Supporting drivers

OPENING SUMMARY



Edmund King OBE. AA President

“Our AA UK EV Readiness Index shows that the conditions for switching to electric cars are improving, with the cost of charging at home, relative to hiked petrol and diesel prices, becoming a real factor in attracting new consumers. This change is reflected in the search for used EVs on AA Cars increasing 78% in the last three months. But the reality is that the transition remains fragile with ongoing concerns about mixed messages from government on issues such as pay as go eVED (electric Vehicle Excise Duty) due to be introduced in 2028.”

The AA’s fourth UK EV Readiness Index highlights the impact of conflict in the Middle East and disruption to global energy markets on UK drivers. While petrol and diesel owners faced rising prices at the pump, EV owners benefited from stable charging rates and captured significant cost savings.

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.

Back in March the index exceeded 50 for the first time. The Q2 2026 Readiness Rating has now increased to 58.8 (Q1 2026: 53.8), 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 improved public and home charging scores, as EV charging prices remained stable compared with rising petrol prices. Given the impact of fuel price inflation on the Q2 findings, we would expect the Readiness Rating to lose some its recent gains when the current disruption eases. However, the immediate outlook for energy markets remains highly uncertain, and the impact of higher fuel prices will inform longer term buying habits.

The favourable conditions for EVs have been reflected in an uplift in consumer demand. Searches for ‘used EVs’ on AA Cars increased by 78% between March and May, compared with the prior three months. In new car sales, battery EVs recorded the fastest growth of new car registrations in May, capturing 27% of the market.¹ This remains below the UK government’s headline ZEV mandate target for 33% of new cars sold to be zero-emission vehicles sales in 2026.

This edition’s Quarterly Insight takes a closer look at fuel and charging costs. It covers the attractive deals for EV drivers, as well as unresolved barriers to longer term adoption, including the disparity between public and home charging costs.¹ [SMMT : UK Car Registrations](#)



KEY FINDINGS

The Q2 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: 53 (Q1 60)

Upfront costs of EVs grew marginally in the quarter, with higher prices for used EV prices impacted by increased competition in the marketplace.

The cost of new EVs remained stable at 26% higher (Q1: 26%) compared to petrol equivalents. Used electric vehicles saw an increase in costs to 3% more expensive than petrol equivalents (Q1: 10% cheaper). The increase was impacted by increased competition in the market; searches for 'used EVs' on AA Cars increased by 78% between March and May, compared with the prior three months

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

- The AA is monitoring the impacts of conflict in the Middle East, which could drive service 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: 60 (Q1: 43)

Q2 saw significantly higher petrol prices, impacted by disruption to global energy markets following the start of the US-Iran conflict on 28 February. In contrast, public charging costs remained flat, and home charging costs fell, creating cost savings for EV drivers. The number of EV chargers also surpassed 120,000, although public networks remain below the required scale for mass adoption.

Petrol prices reached 159.6p at the end of May, a nearly 20% increase on the Q1 Index. Public Ultra Rapid prices remained stable, with charging costing 15% more per mile than petrol, down from 35% in Q1.

Home charging prices decreased slightly. In a straight comparison with petrol, home charging fell to 67% cheaper per mile than petrol equivalents (Q1: 57%). After accounting for the average cost of financing charger installation over a one-year period, home charging was 2% (Q1: 25%) more expensive.

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 121,262 EV chargers installed to date (Q1: 118,321), which is 40.42% of the Government's target for 300,000 charging points by 2030.

Upkeep | Average Score: 60 (Q1: 60)

EVs continue to compare favourably with petrol vehicles on upkeep and maintenance. Out of charge incidents decreased in the quarter, reflecting the impact of seasonal changes and warmer weather.

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

- 88.4% (Q1: 88.7%) of EV callouts were fixed at the roadside, compared with 84.6% (Q1: 86.0%) of petrol vehicles.

Running out of charge accounted for 1.2% (Q1: 1.5%) of all call outs, compared with 8.3% in 2015. the rate remains significantly below



**Costs
Average
= 53 (-7)**



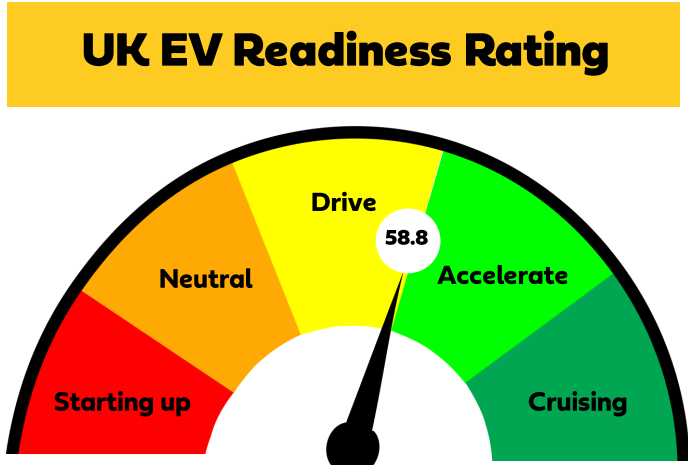
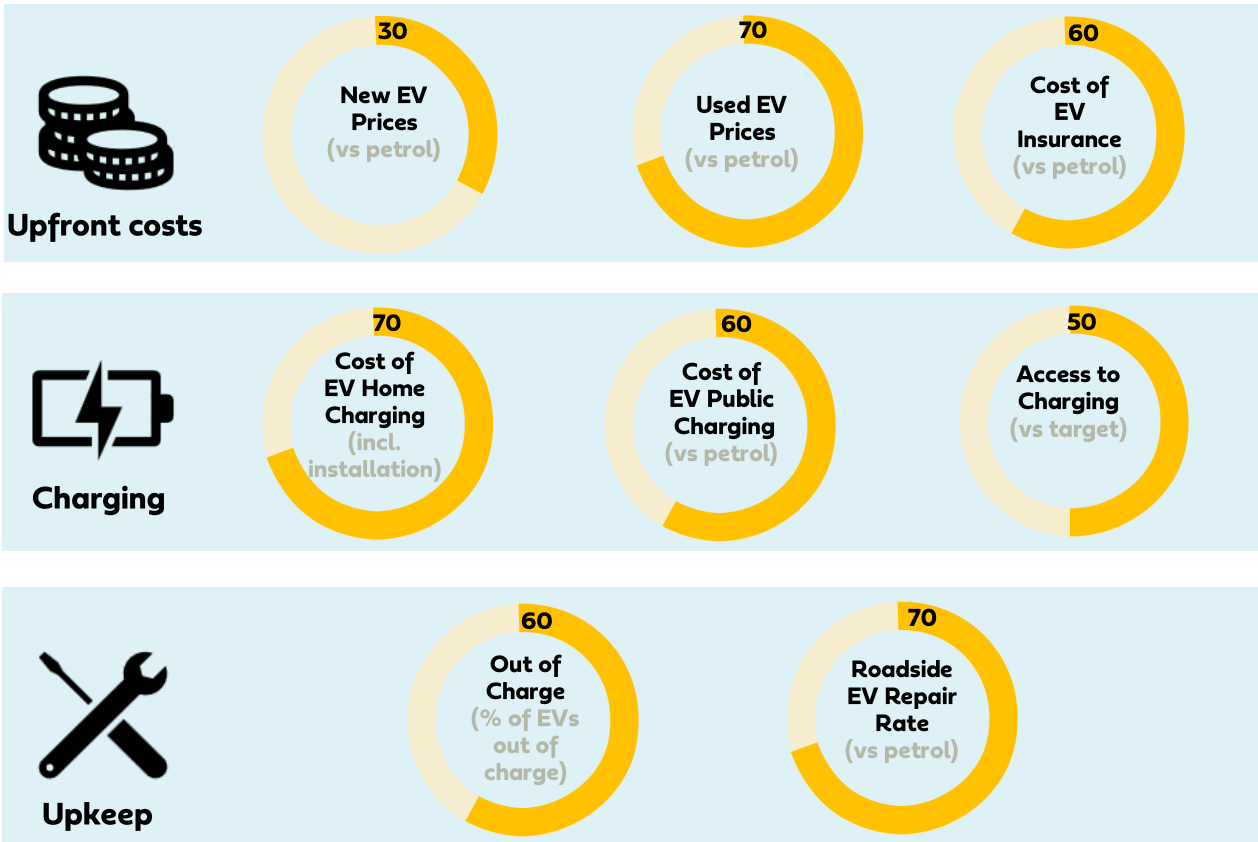
**Charging
Average
= 60 (+17)**



**Upkeep
Average
= 65 (+5)**

UK EV Readiness Index Q2 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 March 2026 to June 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

The AA's Q2 Readiness Index highlights the significant impact of global energy market disruption on UK motorists. Higher fuel prices have created clear cost savings for EV owners who can charge at home, which has been reflected in a tangible uplift in EV demand.

For many consumers, the recent disruption has demonstrated the reliability of EV charging prices in periods of uncertainty, which will inform longer term buying habits.

However, areas of significant driver concern - including EV costs and policy uncertainty - remain unresolved and will continue to inhibit longer term adoption.

Key Findings

Rising fuel prices since the start of the Iran conflict have created eye-catching savings for EV drivers with home charging. The Q2 Readiness Index found that home charging would save the average EV driver around £20 per 200 miles compared with a petrol car, a 67% discount to the price paid at the pump. This is a conservative estimate based on Ofgem's energy price cap, rather than cheaper tariffs which include off-peak charging options.

The stark cost-savings have supported an inflection in demand, with a 78% increase in searches for 'used EVs' on AA cars between March and May, compared with the prior three months. The three most searched models - the Nissan Leaf, Tesla Model 3, and Kia Niro - were first launched more than seven years ago. Demand for older, cheaper models underscore receding concerns around technological barriers, like 'range anxiety', which have been increasingly replaced by 'pump anxiety' in consumer decision making.

While rising fuel prices have strengthened the economics of EV ownership, there remains a significant cost gap between drivers who can charge at home and those who rely on the public network.

Higher fuel costs improved the attractiveness of public charging in the Q2 Index, which fell to 15% more expensive per mile than petrol, but remains notably higher than home charging rates.

Recent findings from EVA England highlight this disparity, identifying high public charging costs as a one of the key

barriers to wider adoption.¹ The organisation recommends structural reform to bring down standard charges, including removing policy levies, incentivising dynamic pricing and VAT equalisation.

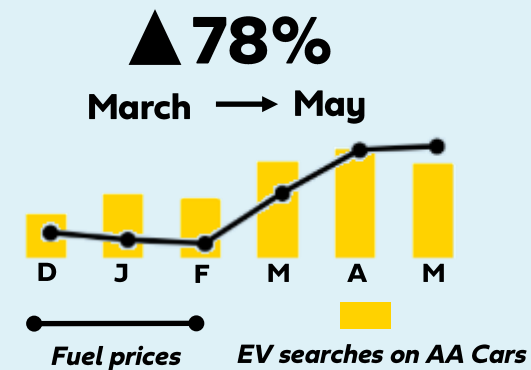
Together with vehicle excise duty changes for EVs, public charging risks weakening the cost case for drivers who are already less able to benefit from the cheapest charging options.

EVA England: [Putting the driver first \(2026\)](#)

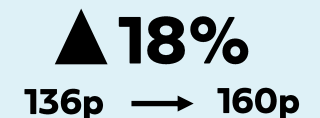


AA research

Used EV searches on AA Cars website rose by 78%



Petrol prices rose



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.*

AA *Always
Ahead*