



UK EV READINESS INDEX

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

September 2025



Consumer confidence Sustainable future Supporting drivers

LAUNCHING THE AA EV READINESS INDEX



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"The transition to electric vehicles is reshaping the UK's motoring landscape. However, drivers are uncertain how far and how fast they can change without the right support in place."

The transition to fully electric vehicles (EVs) is the most significant shift in the automotive industry for a generation. However, consumer demand for EVs has not kept pace with supply, causing issues for car manufacturers and government ambitions.

The AA has over 16 million customers and has been by drivers' sides for more than 120 years. Our members tell us that the changing EV landscape has left them feeling uncertain about what the transition means for them. Many feel left behind by the focus on the supply side of car production.

To meet these concerns, we need to ensure that the transition is better understood from the driver's perspective, identifying and understanding why making the switch to an EV remains a difficult decision for many.

At The AA, we have unique access to the full view of the challenges and opportunities posed by the EV transition for UK drivers. Our operations span the key moments in car ownership, from learning to drive, to buying, selling, insuring and repairing at the roadside or at home.

That is why we are launching The UK EV Readiness Index today, leveraging our proprietary data to track and analyse eight key factors influencing drivers' readiness to switch to EVs.

We have combined these factors into an overall "Readiness Rating" which offers a snapshot of how practical and appealing EV ownership is for drivers today.

The current Readiness Rating is 47.5, indicating that while EVs are a good option for some drivers, significant barriers remain for mass adoption.



KEY FINDINGS

The Q3 2025 UK EV Readiness Index highlights the key barriers to mass adoption, despite favourable conditions for some drivers to switch to an EV. 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: 43

The upfront cost of new EVs and insurance remains a significant barrier. Although falling prices in the used-EV market offer good value, depreciation rates are unsustainable for long-term adoption.

The Government's Electric Car Grant helps some drivers who are looking to buy **new EVs**, but many remain hesitant or priced-out.

- The average cost of a new EV across the four models selected for the Index was 27% higher than their petrol equivalents.
- Of the four models, only the Vauxhall Corsa has so far qualified for the grant, which reduced the EV price gap to £4,370, down from £5,870 earlier in the year.

The **used-car market**, where most UK drivers buy their vehicles, is increasingly attractive for buyers.

- The average cost of a used EV across the four models was 3% higher than the petrol equivalents.
- The steep rate of depreciation on EVs raises concerns for the longer-term health of the

market, with knock-on impacts for fleet operators looking to purchase new EVs.

Insurance costs remain significantly higher for EV drivers.

- The average EV insurance premium was 19% higher than the average petrol premium.
- As the market matures and the risk rates and repair costs of EVs are better understood, premiums should fall.

Charging | Average Score: 40

Despite cost-saving opportunities for drivers with access to home charging, home charger installation, public charging costs and charging infrastructure remain obstacles to wider EV adoption.

- Home charging was 22% more expensive per mile than petrol equivalents when the average cost of financing a home charger over a one-year period was included. Excluding installation costs, home charging was 59% cheaper per mile than petrol equivalents, presenting significant savings opportunities.
- **Public ultra-rapid charging** was 31% more expensive per

mile compared with petrol equivalents.

Despite progress on **charger installations**, EV infrastructure remains well below the scale required for mass adoption.

- There are 85,163 public chargers, which is 28% of the Government's target for 300,000 charging points by 2030 - nearly triple the number in 2021.
- Access to charge points remains a concern for drivers today, including prevailing regional disparities

Upkeep | Average Score: 65

EVs compare favourably with petrol vehicles on upkeep and maintenance.

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

- 88.2% of EV callouts were fixed at the roadside, compared with 84.7% for petrol vehicles.
- 'Range anxiety'** is receding as a major obstacle.
- Running out of charge accounted for 1.3% of all callouts – a sixfold decrease from 8.3% in 2015 – which will increase driver confidence in EVs.



**Costs
Average
=43**



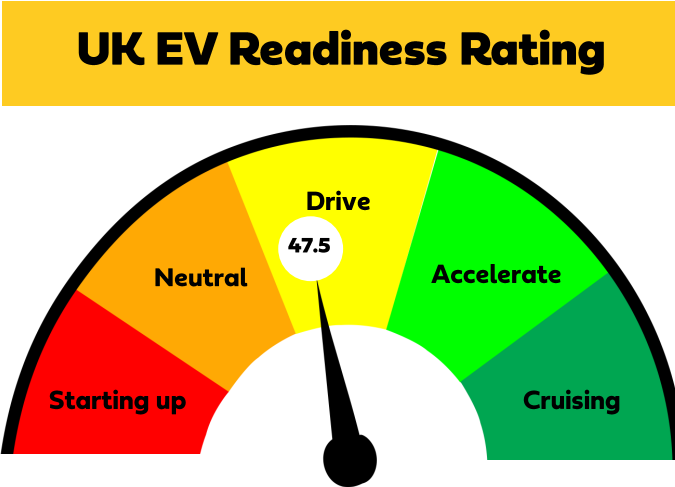
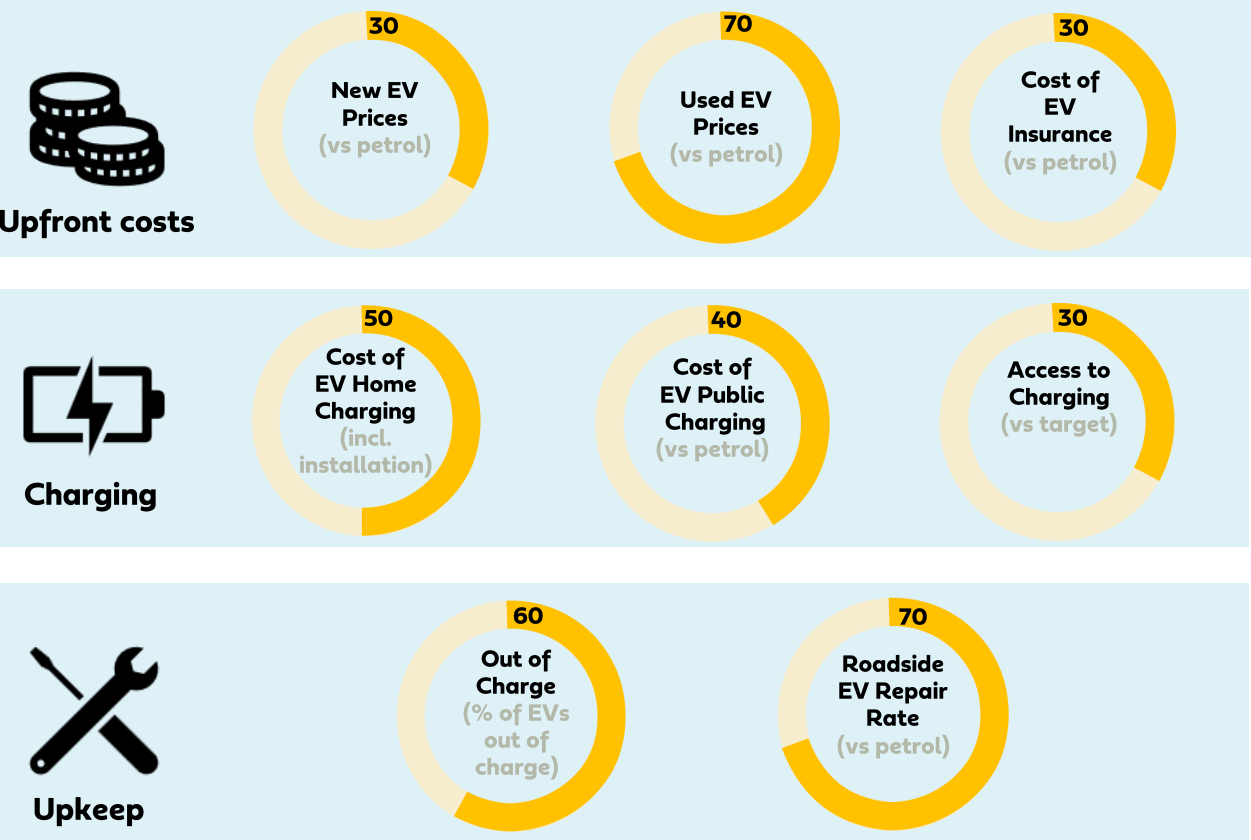
**Charging
Average
=40**



**Upkeep
Average
=65**

UK EV Readiness Index Q3 2025 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.



Switching to an EV is favourable for some drivers, but conditions need to improve 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 Government's Electric Car Grant is a step in the right direction, with new research from The AA finding an increase in interest for new EV purchases. However, up-front costs remain a key barrier for many drivers, and more needs to be done to address the wider factors impacting EV adoption.

Electric Car Grant

A new study by The AA has found that 5% of drivers are considering buying an EV following the announcement of the Government's Electric Car Grant, compared with the 1% of drivers who were already looking to buy an EV and want to use the grant.*

The combined 6% considering using the grant is significant as private sales of all kinds of new cars was approximately 10% of private sales in 2024, with the other 90% buying used cars.**

However, the affordability of new EVs will remain a significant barrier for most drivers, as nearly four in ten drivers (38%) surveyed still say that new EVs are too expensive, even with the support. This aligns with the findings of The AA's inaugural Readiness Index, which found that new EV prices are favourable for some, but prices need to fall further to enable mass adoption.

Second-hand market remains crucial

The second-hand market, where most drivers buy their vehicles, is key to the EV transition, with 20% of respondents saying the grant does not help because they only buy used cars.

Whilst conditions are improving for drivers looking to buy second hand, with used EV prices falling by 24% over the past two years, the current dynamic of weak demand driving lower used prices is unsustainable for the UK's net zero ambitions.***



Fleet operators, who drive the majority of new EV sales, are absorbing significant depreciation costs, which may slow new EV sales.

Together with the BVRLA, we support targeted grant incentives in the used EV market to stimulate demand and restore confidence. This is supported by responses to The AA's study, which found that incentives for used EVs would have the greatest influence on driver readiness to switch.

Wider support needed

Alongside purchase costs, drivers are looking for improvements across a range of factors that influence the attractiveness of EVs.

Respondents to the study cited improvements to charging infrastructure - including discounted home charger installation - and cheaper charging costs as key factors in their readiness to switch to electric.

AA research



38% say even with the grant, it is too expensive to buy a new EV



24% say they will never buy an EV



20% say they only buy used cars, so the grant doesn't help



5% say the grant is making them consider an EV



1% say they were already buying an EV

** The AA conducted an online survey with Yonder, which received 14,915 responses from AA members between the 12th and 20th August 2025. Yonder is a member of the British Polling Council and abides by its rules.*

*** In 2024, 746,00 new cars bought by private buyers compared to 7.6m used cars.*

***** Marketcheck found that the average listed price of a used EV in the UK has fallen from £30,441 to £23,029.52 between May 2023 and May 2025, a reduction of 24.35%.*

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 charge points 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.*

