Which?

Charging Ahead

A Driver-Centric Approach to Public EV Charging

POLICY REPORT JULY 2026

Contents

Executive summary

The age of the electric vehicle is arriving fast

The shift to Electric Vehicles (EVs) is gaining significant momentum. We estimate that more people are now travelling by EV than by train.[1] 95% of current EV drivers are likely or very likely to recommend an EV to friends or family.[2] Uptake is likely to be further fueled by an increasing number of affordable EVs coming to market and high petrol and diesel costs. In our latest sustainability tracker, 54% of drivers tell us they would consider buying an EV in the future, an increase from 50% on the year before.[3]

In 2022 Which? published *Building an Electric Vehicle Charging Infrastructure that is Fit for the Future*,[4] discussing many of the actions that were needed to create a UK-wide public charging network that is fit for purpose. We are returning to the subject now because the high level of overall driver satisfaction masks a structural divide.

The home charging divide persists

An individual drivers' experience of the EV revolution is framed by one major issue; whether they can charge at home or not.

10 million households in Britain do not have any potential for off-street parking, with particular concentrations in densely populated urban areas, housing estates and terraced

[1] The latest National Travel Survey data on trips (for 2024) shows 547 trips per person per year by car (as either driver or passenger) and 21 trips per person by rail (excluding London Underground). In 2024, 4% of the car fleet was battery electric (source: https://www.zapmap.com/ev-stats/ev-market). If we assume travel behaviour is similar for electric vehicles compared to petrol / diesel (a reasonable assumption) then around 22 trips would have been made per person per year by battery electric car in 2024. Given the proportion of the car fleet that is electric is now over 5% and climbing, we can conclude that more trips are being taken by battery electric car than by rail on typical days.

[2] Steer the Conversation, EVA England Survey Report 2025, EVA England

[3] Sustainability Tracker, Which? Policy and insight

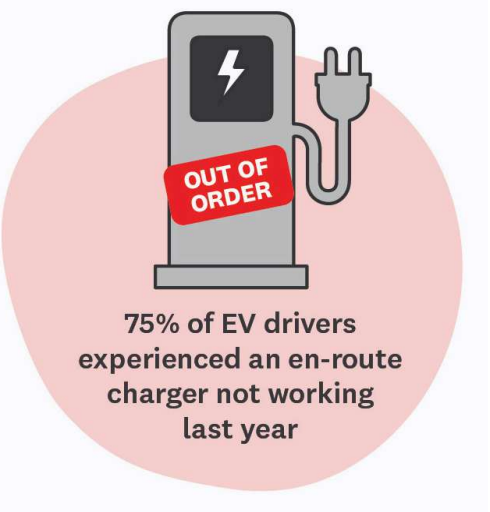
[4] Building an Electric Vehicle Charging Infrastructure that is Fit for the Future, , Which?, February 2022

streets.[5] Whilst there may be alternative solutions for a proportion of these households, the public network remains a crucial enabler of a widespread transition that can reach all parts of society. Even for those who can charge at home, the public network matters - 49% of drivers use the network at least once a month and a further 28% do so at specific periods of the year such as holidays.[6]

The experience of those who rely on the public network is fundamentally different to those with home charging:

- Those who charge at home pay an average of 10-28p/kWh, compared to 54p/kWh or higher for those who cannot.[7]
- Drivers still experience problems charging when using the public network.

The most commonly experienced issue is an en-route charger not working, but the table below shows a wide range of other issues such as difficulties paying or finding chargepoints. In addition, Charge Point Operators (CPOs) also tell us that the most common consumer issue their members deal with is long delays in receiving pre-authorisation holds back from payment providers.



There have been improvements made following the introduction of the Public Charge Point Regulations in 2023, which introduced measures Which? called for such as payment interoperability, an availability standard and 24/7 helplines for drivers.[8] Whilst we are pleased to see the Public Charge Point Regulations having some effect, policy-makers need to realise that

[5] The RAC Foundation found that 35% of households in Great Britain do not have the potential for off-street parking (Standing Still, RAC Foundation, 2021). There were an estimated 28.2 million households in Great Britain in 2025 (Labour Force Survey, ONS), implying around 9.9 million households do not have the potential for off-street parking.
[6] EV Annual Charging Survey 2025, Zapmap
[7] Zapmap Price Index, Zapmap, Accessed 16th June 2026
[8] Building an Electric Vehicle Charging Infrastructure that is Fit for the Future, Which?, February 2022

relentlessly improving the driver experience is a core foundation of increasing EV uptake and widening it to a broader cross-section of society.

Proportion of drivers who have experienced problems on the public charging network at least once in the last year

	En-route chargers	Destination chargers
Charger not working	75%	68%
Not enough chargers at the location for demand	51%	49%
Charger blocked by an Internal Combustion Engine vehicle	29%	34%
Not able to use preferred payment method	30%	29%
No connectivity	23%	23%
Power provided not as advertised	25%	20%
Difficult to find exact location of chargepoints	18%	18%

Source: Zapmap EV Annual Charging Survey 2025 (we are grateful to Zapmap for allowing us to use full results from the survey)

Consumer frictions will hold back EV growth

Problems with the day-to-day experience of the new technology can damage consumer confidence. EV drivers have a right to expect a smooth and easy consumer experience and many non-EV drivers will continue to be nervous about making the switch if charging a car is not reliable and simple. We are still too far from a charging experience where drivers experience problems as infrequently as for refueling a petrol or diesel car. We agree with the Electric Vehicles Association (EVA) England's statement in their recent *Putting the Driver First* report that the Zero Emission Vehicle mandate and the subsequent EV transition cannot succeed until drivers consistently have a seamless experience at the chargepoint.[9]

The power to tackle many issues that drivers experience on the network lies with public sector bodies, either directly or through working with businesses.

- Government and Ofgem have several levers at their disposal to tackle the high cost of charging (including removing environmental and social levies from energy bills as we have called for in our recent report to support consumers with the cost of living[10]),
- Chargepoint signage rules are in the remit of DfT, Highway Authorities and Local Authorities,
- Financial regulators should engage with industry investigations that are underway to identify the causes of delays in the return of pre-authorisation holds.

EV driver experiences are not sufficiently driving policy

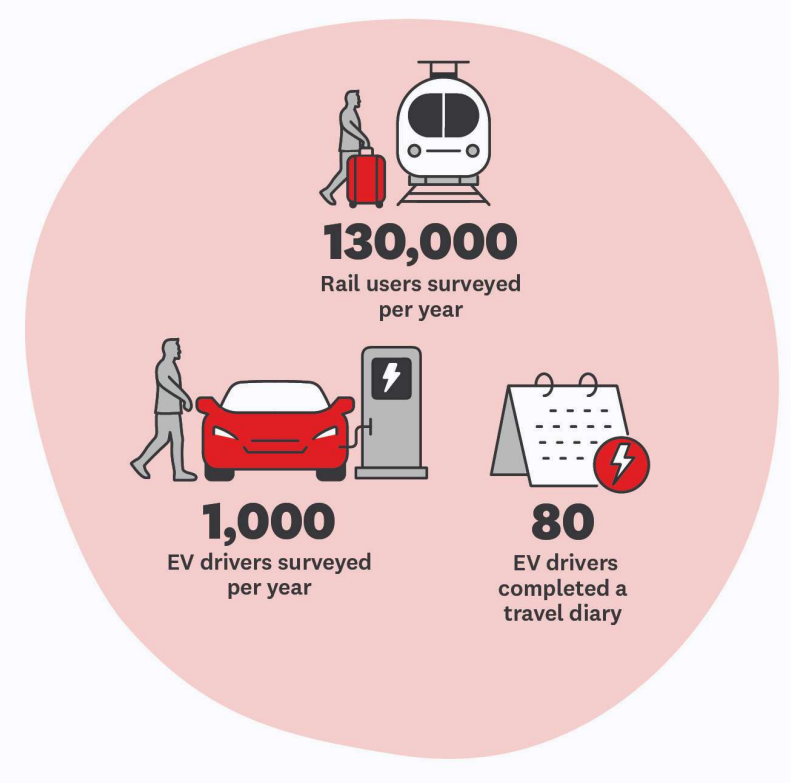
We do not think that EV driver experiences of the public network are at the heart of public policy in the area. There are two issues currently:

[9] Putting the Driver First: Building an EV transition that works for everyone, EVA England, June 2026
[10] A manifesto to support consumers with the cost of living, Which?, April 2026

1. Despite the existence of many excellent surveys of EV driver views, there is no data source that tells us how often drivers are experiencing problems.
2. There are no public targets for driver satisfaction with the public charging network, or the data collection to back them up.

This compares poorly to other transport modes; e.g. rail scorecards are used to help drive up passenger satisfaction levels and are underpinned by the Rail Customer Experience Survey that asks 2,500 rail users every week about their most recent journey (130,000 per year) - in line with transport best practice data collection to minimise recall bias.[11,12]

By contrast, the Government's EV driver behaviours and attitudes tracker surveys only 1,000 EV drivers per year and does not ask specific questions about drivers' recent experiences. The tracker includes a travel diary element, but just 80 EV drivers filled this in.[13]



Crucially, none of this data is linked to a transparent institutional framework with the power and accountability to improve the day-to-day experience. Too often no public body takes clear ownership of ensuring the timely resolution of problems. Public policy is often focused on those things that can be easily measured - such as the number of chargers installed or EVs bought. Whilst these are important metrics they will both be undermined if drivers do not trust the public network.

[11] Rail passengers have spoken; it's time to listen, Transport Focus, December 2025
[12] Rail Customer Experience Survey - Frequently Asked Questions National Rail (part of the Rail Delivery Group), December 2025 Accessed 23rd June 2026
[13] Electric vehicle (EV) driver behaviours and attitudes tracker, DfT

We think that accurate and timely data on EV driver experience is necessary to assess progress from a drivers point of view and form the basis for consistent and robust targeting of measures that most improve drivers' everyday experience. We also think it is possible:

- OZEV's EV driver tracker could be substantially extended
- A national spot sampling approach could be established to collect drivers' contemporaneous charging experiences.

A relentless focus on the driver experience should inform policy

A relentless focus is now needed on the driver experience on the public network, both for existing EV drivers and to drive the next phase of consumer growth. Currently a substantial majority (81%) of EV drivers have access to their own chargepoints,[14] but policymakers should not be comfortable with this fact, or complacent about high average satisfaction rates. The transition needs to work not only for a subset of drivers, but for all those drivers who use the public network frequently, particularly those without their own driveway or dedicated parking space.

To drive the next stage of EV adoption, we must focus on measuring and improving the day-to-day charging experiences that influence public perception and conversations about EVs. The government should focus on two key areas:

- **Improving Data Collection:** Systematically gather information to accurately understand the frequency and nature of the charging problems EV drivers encounter.
- **Prioritising Solutions:** Recognising that EVs are now a mature form of transport, swift action is needed to solve identified charging issues as rapidly as possible.

In the immediate future we would like to see firm action to tackle the causes of the high cost of public charging for drivers, further improvements to the signage of EV chargepoints across the country and government / regulator engagement with efforts by industry to identify the source of delays in the return of pre-authorisation hold amounts.

The government must also investigate methods to enhance the transparency and independence of how consumer outcomes are monitored and how the entities responsible for addressing root causes are identified. This review should evaluate the potential contributions of regulators and statutory independent bodies, such as Transport Focus. Serious consideration should be given to EVA England's recent proposal for an independent regulator that incorporates a dedicated service for customer complaints and resolutions.

[14] Steer the Conversation, EVA England Survey Report 2025, EVA England, October 2025

Introduction: The uneven arrival of the Electric Vehicle age

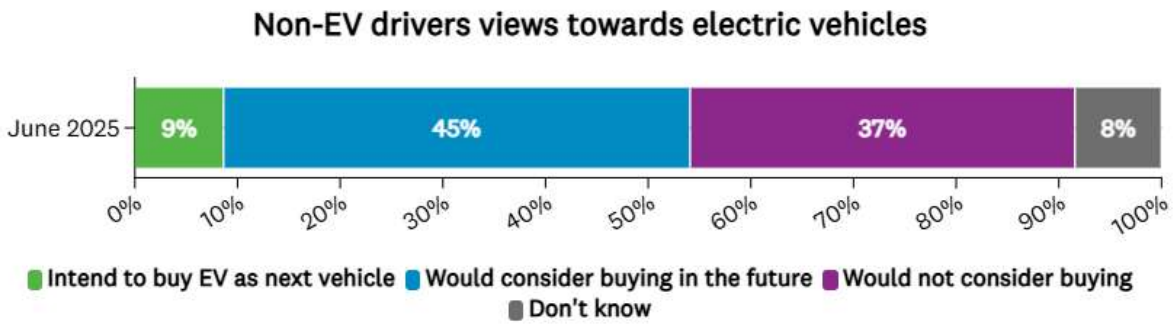
EV travel is now more common than rail travel, and on average drivers are very satisfied

The transition to EVs is arriving fast in the UK. Over 23% of all new cars sold in 2025 were fully electric, and there are now around 2 million fully electric cars on UK roads as of March 2026.[15] It is important to recognise that this means travelling by EV is becoming as common as mature modes of transport; for example we have estimated that on an average day this year more people will travel by an EV than will travel by train.[16]

And we are likely to see an acceleration of EV uptake. An increasing range of more affordable EVs are coming to the market which makes EVs more accessible[17] and charging an EV at home is substantially cheaper than petrol / diesel cars per mile travelled.[18] In our latest sustainability tracker, 54% of drivers tell us they would consider buying an EV in the future, an increase from 50% on the year before.[19] Due to the recent increase in petrol and diesel prices, there are also times when charging using the public network is cheaper too, driving a further increase in interest.[20]

---

[15] UK ev market share 2026: latest electric car registration stats | zapmap
[16] The latest National Travel Survey data on trips (for 2024) shows 547 trips per person per year by car (as either driver or passenger) and 21 trips per person by rail (excluding London Underground). In 2024, 4% of the car fleet was battery electric (source: https://www.zapmap.com/ev-stats/ev-market). If we assume travel behaviour is similar for electric vehicles compared to petrol / diesel (a reasonable assumption) then around 22 trips would have been made per person per year by battery electric car in 2024. Given the proportion of the car fleet that is electric is now over 5% and climbing, we can conclude that more trips are being taken by battery electric car than by rail on typical days.
[17] The Which? car review team are seeing an increasing number of smaller, cheaper cars entering the market over the last year
[18] How much does it cost to charge an electric car?, Which?, May 2026
[19] Sustainability Tracker, Which? Policy and insight
[20] Public EV charging now cheaper than petrol for most drivers, Charge UK, April 2024



Source: Which? Sustainability Tracker 2025. Respondents were asked: Which ONE of the following statements best describes your current attitude towards owning or buying an electric vehicle? Base: Non-EV drivers (1,409).

Which? has campaigned for a range of policy measures to support drivers making the switch to an electric vehicle - for example publishing *Building an Electric Vehicle Charging Infrastructure that is Fit for the Future*.[21] Many measures we called for were introduced through the Public Charge Point Regulations 2023. These regulations mandated a range of standards such as contactless payments, reliability standards, publication of location and pricing data and staffed telephone helplines.

A range of other government policies continue to support the transition, including:

- The Electric Car Grant which offers offers a reduction of up to £3,750 on the new price of eligible electric cars, recently extended through to 2029/30
- The Government taking welcome steps to make it easier for households to run charging cables across pavements to widen access to home charging[22]
- 100% business rates relief announced for charging sites in England at the November 2025 budget.

EV drivers are also very satisfied on average. The Electric Vehicles Association England (EVA England) found that 95% of EV drivers are likely or very likely to recommend an EV to friends or family.[23]

The home charging divide persists

However, this rosy picture masks a structural divide. An individual drivers' experience of the EV revolution is framed by one major issue; whether they can charge at home or not. Drivers with driveways (or cross-pavement charging) can charge for an average of 10-28p/kWh, while those who cannot access home charging face public charging costs of an average of 54p/kWh or higher.[24]

This much higher cost is coupled with a range of other concerns about the public network. Research by Consumer Scotland found that "EV drivers raise concerns about [the] reliability, accessibility and costs [of public charging]. The situation is such that EV drivers in our focus

[21] Building an Electric Vehicle Charging Infrastructure that is Fit for the Future, , Which?, February 2022
[22] Shake-up will help UK motorists without driveways to charge EVs, Guardian, April 2024
[23] Steer the Conversation, EVA England Survey Report 2025, EVA England, October 2025
[24] Zapmap Price Index, Zapmap, Accessed 16th June 2026

groups view a consistent, reliable and affordable public charging network as critical to the widespread adoption of EVs…..”[25].

10 million households in Britain do not have any potential for off-street parking, with particular concentrations in densely populated urban areas, housing estates and terraced streets.[26] The public network is therefore a crucial enabler of a widespread transition, reaching all parts of society, alongside other potential solutions such peer-to-peer charger sharing, or cross-pavement and workplace charging.

Currently a substantial majority (81%) of EV drivers have access to their own chargepoints[27], reflecting the barriers to uptake amongst many groups such as those living in flats or those in densely populated parts of cities:

- A majority (54%) of drivers are interested in switching to an Electric Vehicle.[28]
- However, 60% of drivers without a driveway say they won’t ever consider an EV (compared to 43% with a driveway).[29]
- Urban EV drivers (who have lower access to home charging) continue to report higher charging anxiety (both range and locating a charger) compared to suburban and rural drivers.[30]

The good news is that some of the barriers to EV uptake for many households, such as up-front cost and the availability of chargers, are being chipped away at. But that means the transition to electric now needs to work not just for the early adopter; it also needs to work for those without their own driveway / dedicated parking space, and those for whom frictions in the consumer experience will dissuade them from making the switch. Driver needs and preferences should guide policy focus - both on the public network and where alternative charging solutions (such as those mentioned above) are appropriate.

---

[25] Consumer Experience of Electric Vehicles in Scotland, Consumer Scotland, 2024
[26] The RAC Foundation found that 35% of households in Great Britain do not have the potential for off-street parking (Standing Still, RAC Foundation, 2021). There were an estimated 28.2 million households in Great Britain in 2025 (Labour Force Survey, ONS), implying around 9.9 million households do not have the potential for off-street parking.
[27] Steer the Conversation, EVA England Survey Report 2025, EVA England, October 2025
[28] Sustainability Tracker, Which? Policy and insight
[29] Steer the Conversation, EVA England Survey Report 2025, EVA England, October 2025
[30] Steer the Conversation, EVA England Survey Report 2025, EVA England, October 2025

The state of the public network is also important to those EV drivers who do have their own chargepoint but rely on the public network at other times. 49% of drivers use the network at least once a month during the year, and a further 28% use the network at specific periods of the year such as holidays.[31]

Despite improvements, too many friction points remain with public charging

The improving public charging network is key to the next wave of adoption

For those without a dedicated parking space outside their homes, a smooth and affordable experience on the public charging network will still be a key part of enabling people to switch to an electric vehicle. And there is a substantial degree of good news on this front as Zapmap's annual Charging Insights Report for 2025 shows:

- An increased satisfaction with the public charging experience to 69%, up from 64% the previous year
- Three in every five respondents say that the public charging has improved over the past year
- The most common reasons given for improvements drivers have seen in the public charging network are better availability of chargers (90% of respondents) and improved reliability (70% of respondents). This illustrates the continued success of improving the number of chargepoints and continued efforts to improve reliability.

There are many drivers of this improvement, including the continued financial support of the EV chargepoint rollout and the continued efforts of Chargepoint Operators. A key factor has also been the introduction of Public Charge Point Regulations 2023. Which? highlighted the weaknesses of the public network as it was in 2022, and called for a range of improvements including payment interoperability, an availability standard and 24/7 helplines for drivers.[32] Key measures introduced by the regulations were:

- Most public chargepoints will need to offer contactless payments.
- Rapid chargepoints must be 99% reliable, and compliance must be published online.
- Chargepoints 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.[33]

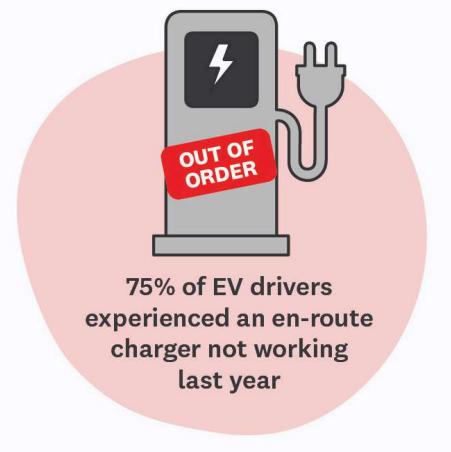
Many of these measures are welcome and have driven some improvement. However, the approach is not sufficiently consumer focused and drivers still experience too many problems (as discussed below). The way the reliability target has been introduced is a good example of an industry-centric target, as opposed to one centred around consumers. There are a range of accepted reasons for rapid charge points being out of service that result in them not being counted for the reliability measure. Whilst this is appropriate for monitoring chargepoint operator performance, it is not what drivers care about. Drivers only care

[31] EV Annual Charging Survey 2025, Zapmap
[32] Building an Electric Vehicle Charging Infrastructure that is Fit for the Future, Which?, February 2022
[33] The Great EV Charging Report 2024, EVA England, 2024

whether a charger is working or not, not whose fault it is. By comparison, measures of whether a train is on time or not do not distinguish between what the cause was - the cause is only relevant for who ultimately bears the burden of compensation. From a passenger perspective, all causes need to be tackled and reduced. The same should be true for EV charging.

However, drivers still experience too many problems

Unfortunately, the improvement is not fast enough to keep pace with the healthy growth in the EV sector. Drivers still experience a wide range of problems when using the public charging network.



Zapmap's Annual Charging survey 2025 shows that 40% of drivers experience problems with en-route and destination chargers at some point during the year, with the table below showing the proportion of drivers who have experienced a range of issues over the last year. (We are grateful to Zapmap for allowing us to use full results from their survey)

Proportion of drivers who have experienced problems on the public charging network at least once in the last year

	En-route chargers	Destination chargers
Charger not working	75%	68%
Not enough chargers at the location for demand	51%	49%
Charger blocked by an Internal Combustion Engine vehicle	29%	34%
Cost to charge too expensive	29%	31%
Not able to use preferred payment method	30%	29%
No connectivity	23%	23%
Power provided not as advertised	25%	20%
Difficult to find exact location of chargepoints	18%	18%
Lack of facilities	18%	13%
No suitable connector for my vehicle	5%	5%

Source: Zapmap EV Annual Charging Survey 2025

Furthermore, Charge Point Operators (CPOs) also tell us that the most common consumer issue their members deal with is long delays in receiving pre-authorisation holds back from payment providers.

Whilst it is encouraging that for many drivers these are not regular occurrences, problems with the day-to-day experience of a new technology can damage consumer confidence - so called "adoption friction".[34] Everyday experiences form people's narratives and beliefs,and the impact of social learning is strong. Analysing data from the Which? Sustainability Tracker, 54% of households who know family, friends or neighbours with an EV told us they would consider an EV in the future; that figure fell to 41% of households who don't know family, friends or neighbours with an EV.[35] LCP Delta found a similar effect for other low carbon technology; high interest in solar PV increased by 15% points and heat pumps by 27% points among households with at least one immediate neighbour using the technology.[36]. However, social learning goes both ways - poor experiences are passed on and form part of the prevailing narrative.

Which? research shows that good access to EV charging points when on a journey would encourage 27% of consumers to consider switching to an EV - however this must be a high quality experience.[37] EV drivers have a right to expect a smooth and easy consumer experience and non-EV drivers will continue to be nervous about making the switch if there is not clarity, consistency and simplicity when charging a car.

The goal needs to be a charging experience where drivers experience problems as infrequently as for refuelling a petrol or diesel car (whilst acknowledging the charging experience might look quite different - for example at destination chargers). We agree with the Electric Vehicles Association (EVA) England's statement in their recent *Putting the Driver First* report that the Zero Emission Vehicle mandate and the subsequent EV transition cannot succeed until drivers consistently have a seamless experience at the chargepoint.[38]

Our report on the public charging network in 2022[39] highlighted a wide range of the elements across the consumer journey that need to work for a driver to have a good charging experience. Key factors include:

- The driver must be able to find a charger easily, with transparent and fair pricing
- There must be a charger available within a reasonable time
- The charger must be working
- The connection to the chargepoint needs to work smoothly
- The power delivered must be as advertised
- The payment experience must work smoothly - including payment methods that work for people, good connectivity to ensure payment can be made, and a prompt return of any funds held under pre-authorisation arrangements
- All elements of the experience must be accessible and safe.

Our report called for action to improve charger availability, reliability, connection interoperability, accessibility and payments - many of which were taken up in the Public Charge Point Regulations 2023. Whilst this has improved many elements of the experience,

[34] We Tracked 341 EV Charging Sessions Across Europe. Here's What Went Wrong at Public Charging Stations, EVcourse, March 2026
[35] Sustainability Tracker, Which? Policy and insight
[36] LCP Delta, Guiding the Customer, 2025
[37] Supporting consumers in the transition to net zero, Which?, October 2021
[38] Putting the Driver First: Building an EV transition that works for everyone, EVA England, June 2026
[39] Building an Electric Vehicle Charging Infrastructure that is Fit for the Future, Which?, February 2022

there is insufficient data collected to understand how successful the regulations have been - and the indications are that problems are still too prevalent.

Public institutions have the power to tackle the problems

The power to tackle many of the issues that drivers experience does not always lie primarily with the public face of charging - the Charge Point Operators (CPOs). They are often caused by issues that Government and regulators have oversight of.

For example:

- **The cost of charging:** Average public charging prices rose by 38% between 2021 and 2025 which is in part due to the increased wholesale cost of electricity but also due to a change to how network charges are recovered in 2023 meaning that charge-point operators pay for standing charges for the capacity of a site, not on the actual consumption. The standing charges for rapid / ultra-rapid sites have increased by 462% since 2021/22 and 389% for other sites.[40] The power to change this rests with Ofgem and / or the Government (including, but not limited to, removing environmental and social levies from energy bills as we have called for in our recent report to support consumers with the cost of living[41]).
- **Delays in drivers receiving pre-authorisation holds back:** ChargeUK tell us that the most common consumer issue they deal with is delays in receiving pre-authorisation hold amounts back from card issuers. This occurs when a driver uses a bank card to begin a charging session, and a "pre-authorisation" hold (for example, £45) is held on the card. At the end of the charging session the difference between the pre-authorisation amount and the actual payment is returned. For petrol / diesel pumps with "pay at the pump", there are bespoke arrangements[42] that allow return of these amounts promptly (often almost immediately)[43]. However, with Electric Vehicles these pre-authorisation holds can take days to be returned. Whilst individual amounts might seem small, this issue can sometimes block hundreds of pounds for extended periods if drivers also experience problems when charging. The power to fix this issue is likely to rest with payment service providers, overseen by the Payment Systems Regulator and the Financial Conduct Authority.
- **Poor signage:** Until last year, the majority of the UK's public chargepoints could not be legally signed from the nearby road because of a lack of consistent process at either National or local level.[44] In 2023/24 Transport Focus worked with Zapmap to monitor driver experience on the Strategic Road Network and found that 29% of drivers found signage poor or very poor.[45] The government took the first steps to solve this issue last year, allowing larger EV charging hubs to be signposted from major A roads.[46] However, many chargepoints still cannot be signposted and the announcement did not cover motorways. Solving this issue would require further

[40] Action on high energy costs needed to keep EV transition on track, ChargeUK, September 2025
[41] A manifesto to support consumers with the cost of living, Which?, April 2026
[42] Pay at Pump - Policy and Guidance, UK Finance, April 2021
[43] Pay at Pump is Changing, Asda, Accessed 16th June 2026
[44] Where are the road signs for public EV chargers?, Osprey, March 2025
[45] Electric Vehicle Charging Survey, Transport Focus, Accessed 16th June 2026
[46] Government EV Announcements - what do drivers need to know?, EVA England, July 2025

action from DfT, National Highways and Local Authorities across the country. OZEV carried out a survey with signage stakeholders on this issue in February 2026.

- **Connectivity issues when paying:** When drivers experience issues with EV charging apps or payments, these can often be due to mobile connectivity issues. A poll by Virgin Media O2 in 2025 found that "More than three-quarters of EV drivers (76%) worry about losing mobile connectivity, which would cut them off from maps, charger updates and location information, and even the ability to pay – higher than the 68% who cite range anxiety."[47]

Furthermore there is substantial geographic variation. Whilst the Government continues to work with local authorities on specific initiatives,

These issues all require action from Government or regulators. However, the institutional framework is not set up to drive improvement in the driver experience in a holistic way and ensure strong and prompt focus on solving these issues. The lack of strategic direction to Local Authorities on their role in the roll-out, which we highlighted in our 2022 report,[48] is another symptom of the current institutional framework.

We would like to see firm action to:

- Tackle the causes of the high cost of public charging (including by removing environmental and social levies from energy bills), ensuring action is taken by Budget 2026 at the latest - actions are likely to be in the remit of Ofgem and HMT following the Cost of Charging review led by OZEV
- Further improve signage of EV chargepoints across the country, quickly following up with proposed actions based on the recent survey of signage stakeholders - led by OZEV, working with Highways Authorities and Local Authorities
- Engage with efforts by industry to identify the source of delays in the return of pre-authorisation hold amounts, and identify any ways that Government could help to speed up the solution of this issue and remove blockages - OZEV, together with financial regulators.

A relentless focus on improving drivers' everyday experience

Other transport modes use consumer perspectives more systematically

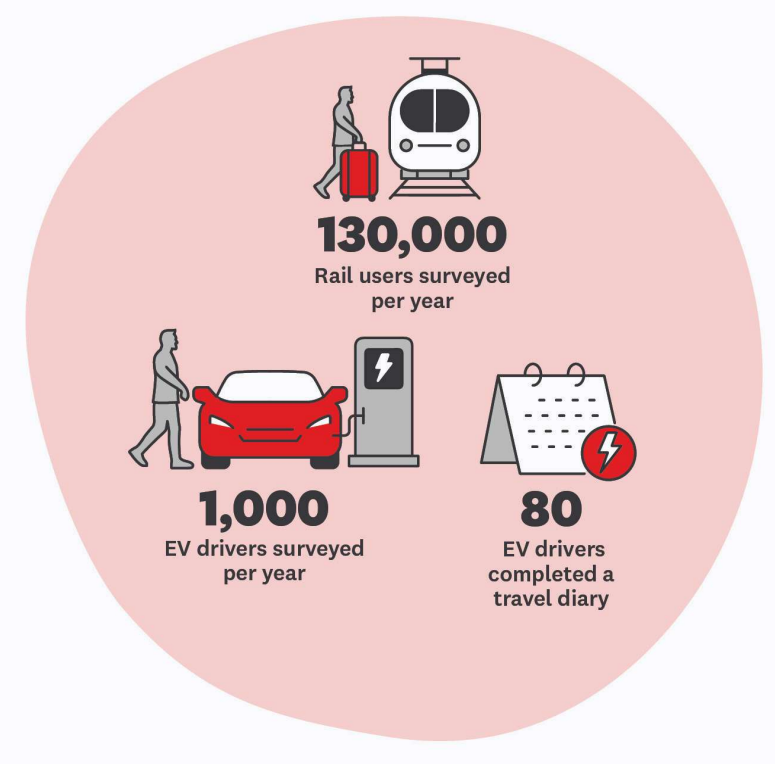
We think a relentless focus is now needed on the driver experience. There are two issues currently:

1. **Government and the charging industry do not know how often drivers are experiencing problems:** It is likely that consumers are experiencing some of the issues discussed above regularly. However, whilst there are many valuable surveys of EV driver views (for example Zapmap's annual EV charging survey, EVA England's annual driver survey, and our own sustainability tracker) they cannot tell us how often drivers on the public network are encountering fundamental difficulties with

[47] Virgin Media O2 optimises connectivity on over 40 motorways and A roads in boost to Britain's EV future, Virgin Media O2, November 2025
[48] Building an Electric Vehicle Charging Infrastructure that is Fit for the Future, Which?, February 2022

charging their car. Without any data on how often these issues are being experienced the Government and industry cannot assess progress from a drivers point of view or set a quantitative vision for improvement.

2. **There are no public targets for driver satisfaction with the public charging network, or the data collection to back them up.** This compares poorly to other transport modes:
    - Transport Focus publishes quarterly rail scorecards that rate how train operators and Network Rail are currently performing and are used within the industry to identify customer focussed improvements and help drive up passenger satisfaction levels.[49] These scorecards are underpinned by the Rail Customer Experience Survey that surveys 2,500 rail users every week (130,000 per year) and asks questions about their most recent journey.[50] This type of survey is in line with standard transport data collection procedure which aims to:
        - Achieve a randomised sample of journeys
        - Minimise bias in people's recollections of their experience by asking about their most recent journey
    - The National Highways performance specification includes Road User Satisfaction.[51] This is measured by the Strategic Road User Survey, collected by Transport Focus, which contacts over 9,000 drivers per year by letter, asking them to fill out a survey online about their most recent journey on the Strategic Road Network.



[49] Rail passengers have spoken: it's time to listen, Transport Focus, December 2025
[50] Rail Customer Experience Survey - Frequently Asked Questions National Rail (part of the Rail Delivery Group), December 2025 Accessed 23rd June 2026
[51] Annual Assessment of National Highways' performance: end of the second road period April 2020 to March 2025, Office of Rail and Road, January 2026

In contrast, electric vehicle drivers are rarely asked about their contemporaneous experience on the public chargepoint network. The Government has established an EV driver tracker, which includes a survey of 1,000 EV drivers about their experiences. However, the questions asked to this sample are about perspectives and behaviour over the past year, and do not ask about recent charging experiences directly and problems experienced. Only 80 EV drivers were asked to fill in a travel diary.[52]

Furthermore, the data collected through this survey is not linked to a transparent institutional framework with the power and accountability to improve the day-to-day experience. As we covered earlier in this article, the Public Charge Point Regulations 2023 do introduce a range of standards and transparency measures. Whilst these were important measures, the outcome metrics introduced, such as reliability figures, are not consumer-centric measures.

The Government needs to challenge itself as well as Chargepoint operators on tackling all issues that undermine driver satisfaction. EVA England points out that there is a real lack of transparency to drivers over who is independently monitoring and assessing chargepoint operators' compliance with the regulations and that there is no independent statutory customer complaints service which drivers can turn to when they encounter issues with particular networks.[53] The appropriate regulatory setup is not a straightforward issue but the transparency and independence could be improved significantly. Currently OZEV monitors consumer outcomes and delivers a range of Government policies, but cannot be independent as it is part of the Department for Transport and the Department for Energy Security and Net Zero.

The government should therefore carry out a review of ways that the driver outcomes are measured and consider which bodies would be able to independently identify which organisations are responsible for solving issues. The arrangements may need to be bespoke given the nature of the Electric Vehicle landscape, but could benefit from considering what role regulators and statutorily independent bodies such as Transport Focus should play.

We contend that the lack of data collection about the experience of the public chargepoint network contributes to two problems:

- A lack of appreciation of the importance of drivers' everyday experiences to supporting demand across all sections of society, and forming social narratives
- A lack of focus on solving preventable issues on the public charging network from Government, who are more focused on those things that can be easily measured - such as the number of chargers installed or EVs bought. Whilst these are important metrics, they will both be undermined if drivers do not trust the public chargepoint network.

We need to measure the driver experience that will form drivers' views, become part of everyday conversations about EVs and shape the next wave of uptake.

---

[52] Electric vehicle (EV) driver behaviours and attitudes tracker, DfT
[53] Putting the Driver First: Building an EV transition that works for everyone, EVA England, June 2026

Improving data on everyday driver experiences

Data collection needs to be meaningfully improved to build robust understanding of EV driver experiences. There are some reasons that collecting EV driver satisfaction data is more difficult than other modes for a range of reasons:

- The current low incidence of EV ownership across the population
- The majority of EV drivers have home chargers and only use the public network infrequently
- Many EV trips will not involve the use of a public charger, even for those who rely on them

However, as we have set out above, we think that accurate and timely data on EV driver experience is very valuable to focus policy in the right areas. We also think it is possible. There are two feasible approaches:

- **Panel Sampling: Inviting known EV drivers to take part.** The DfT has a panel sampling approach for their EV driver tracker. However we think there are two issues with the current tracker:
    - The sample of drivers completing a travel diary is small - this should be substantially increased
    - The survey does not sufficiently capture the problems and / or frictions that drivers can experience: the tracker should capture more specific problem metrics, in line with the Transport Focus / Zapmap EV Charging Survey discussed below
- **Spot Sampling:** Surveying people at the chargepoint (in-person or app-based). This captures contemporaneous experience, immediately after a charging session has ended (or been attempted). This type of sampling is possible:
    - Transport Focus and Zapmap established the EV Charging Survey[54] for the Strategic Road Network to do this. It was able to provide high quality data on how common different types of problems are across the consumer journey. The work surveyed 321 Strategic Road Network-based chargepoint users between August 2023 to March 2024. Headline results include:
        - 68% of drivers were satisfied with their charging experience, with 26% fairly or very dissatisfied
        - 10% of drivers found it fairly or very difficult to find a chargepoint once at a site, with 29% of drivers finding signage poor or very poor
        - Average wait time to start a charge was 5 minutes, with 81% of drivers finding it very or fairly straightforward to start the charge. However 10% of drivers found it not at all straightforward to start charging,
        - 15% of drivers surveyed failed to charge at the site they were being surveyed about, and 18% of drivers had tried a different charging site already and had failed to charge there
        - 79% of drivers found paying for the charge very or fairly good, but 9% found it fairly or very poor

[54] Electric Vehicle Charging Survey, Transport Focus, Accessed 16th June 2026 and *EV charging challenges: Drivers' experiences on motorways and major 'A' roads,* May 2025, Transport Focus

- The EVCourse app was used to carry out a similar survey[55] with 72 Electric Vehicle drivers in the UK, Germany and Finland, across 341 charging sessions. They found that 39% of sessions had some kind of problem, with charging being too slow in 20% of cases, charger not working in 18% of cases and payments failing in 13% of cases. Whilst this evidence is not just related to the UK, it illustrates the insights that can be gained by surveys that ask people about their experience in the moment.

Whilst the Transport Focus / Zapmap EV Charging Survey provided substantial UK data, it is no longer being run and only relates to the Strategic Road Network, which only speaks to a particular type of journey and use case. It is an instructive example of what can be learned, but could only provide a partial picture.

We think a national survey for all types of journeys is needed. This could be:

- Substantially extending OZEV's EV driver tracker, with many more drivers undertaking the travel diary, the inclusion of questions that capture problems drivers can experience when public charging and exploring novel approaches to reach more EV drivers
- A similar approach to the EV Charging Survey, through an app based system, but run regularly and across all types of journeys

Conclusion

We think a relentless focus is now needed on the driver experience on the public network, both for existing EV drivers and to drive the next phase of consumer growth. Currently a substantial majority of EV drivers have access to their own chargepoints, but policymakers should not be comfortable with this fact, or complacent about high average satisfaction rates. The transition needs to work not only for a subset of drivers, but for all those drivers without their own driveway or dedicated parking space and for those drivers who would be dissuaded from making the switch to electric by friction in the consumer experience.

We need to measure the driver experience that will form drivers' views, become part of everyday conversations about EVs and shape the next wave of uptake. Government should focus on:

- Improving data collection to understand how often EV drivers experience different types of charging problems
- Prioritising action to solve those problems as fast as possible, recognising that EVs are becoming a mature transport mode

In the immediate future we would like to see firm action to:

- Tackle the causes of the high cost of public charging, ensuring that the focus is firmly on how to bring down the cost for drivers and that action is taken by Budget 2026 at the latest

[55] We Tracked 341 EV Charging Sessions Across Europe. Here's What Went Wrong at Public Charging Stations, EVcourse, March 2026

- Further improve signage of EV chargepoints across the country, quickly following up with proposed actions based on OZEV's recent call for evidence
- Engage with efforts by industry to identify the source of delays in the return of pre-authorisation holds, and identify any ways that Government could help to speed up the solution of this issue and remove blockages

The government must also investigate methods to enhance the transparency and independence of how consumer outcomes are monitored and how the entities responsible for addressing root causes are identified. Currently OZEV monitors consumer outcomes and delivers a range of Government policies, but cannot be independent as it is part of the Department for Transport and the Department for Energy Security and Net Zero. This review should evaluate the potential contributions of regulators and statutory independent bodies, such as Transport Focus. Furthermore, serious consideration should be given to EVA England's recent proposal for an independent regulator that incorporates a dedicated service for customer complaints and resolutions.[56]

[56] Putting the Driver First: Building an EV transition that works for everyone, EVA England, June 2026

Which? 2 Marylebone Road, London NW1 4DF
Which? 3 Capital Quarter, Tyndall Street, Cardiff CF10 4BZ
Phone +44 (0)20 7770 7000
Fax +44 (0)20 7770 7600
www.which.co.uk