

AA UK EV READINESS INDEX

Q3 2026

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

September 2026 *Data collected from July 2026 to September 2026*



Consumer confidence Sustainable future Supporting drivers

OPENING SUMMARY



Edmund King OBE. AA President

The UK is becoming more receptive to the electric vehicle revolution, with the AA UK EV Readiness Index reaching 60 out of 100 for the first time, as Chinese manufacturers bring greater competition to the market and battery electric vehicle sales continue to rise.

The Q3 2026 Index increased from 58.8 in Q2 to 60, marking the fourth consecutive improvement. However, the AA says the score also demonstrates that significant barriers remain before electric vehicles are accessible and affordable for all drivers.

The AA's fifth UK EV Readiness Index highlights the sustained impact of disrupted energy markets on UK drivers, as EV owners continued to benefit from charging cost savings.

The Index uses 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 Q3 2026 Readiness Rating increased to 60 (Q2 2026: 58.8), the Index's fourth consecutive upgrade, indicating that while EVs are a good option for some drivers, significant barriers remain for mass adoption. We expect the Readiness Rating to lose some of its recent increases when fuel prices normalise, although the prevailing uncertainty in energy markets is likely to influence longer-term buying decisions.

These findings are relevant to the government's ongoing consultation into the Zero Emission Vehicle (ZEV) mandate, which requires manufacturers to meet annual targets for the proportion of zero emission cars and vans sold.

In August, EVs recorded the second highest monthly share of the year new vehicles sales, up to 29.8% 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.

Whether the 2030 mandate remains at 80% for cars and 70% for vans or is adjusted, the priority should be certainty and a clear direction of travel, underpinned by affordable vehicles, reliable charging infrastructure and incentives that give drivers confidence to make the switch.

The AA supports the transition to zero-emission vehicles, but believes targets must be realistic, achievable and supported by consumer demand. The EV Readiness Index shows there is still some way to go before zero-emission vehicles are accessible and affordable for all drivers.

As the growth of Chinese imports continues to impact the UK automotive sector, particularly through lower-cost EVs, this Quarterly Insight explores consumer sentiment towards Chinese cars.

¹SMMT: [UK Car Registrations](#)



KEY FINDINGS

The Q3 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: 57 (Q2: 53)

Upfront costs of EVs saw a slight dip in the quarter. Car prices remained broadly flat across the market, with a 25% premium for new EVs and parity in the used market.

The score for the cost of **new EVs** was upgraded as the price premium over equivalent petrol models narrowed slightly to 25%, compared with 26% in Q2. **Used electric vehicles** saw a slight decrease to 1% (Q2: 3%) more expensive than petrol equivalents.

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 (Q2: 60)

Disrupted energy markets continued to impact UK drivers in the Q3 Index. Petrol prices rose for the second consecutive quarter and remain 20% above prices before the start of the US-Iran conflict. Home charging costs rose slightly but continue to present cost saving opportunities for EV drivers.

Petrol rose to 161.5p per litre, up from 159.6p at the end of May, and 132.50p in February. This offset a slight rise in **Public Ultra Rapid** costs, which remained 15% more expensive per mile than petrol (Q2: 15%).

Home charging prices also rose slightly, with comparative costs flat at 66% cheaper per mile (Q2: 67%). After accounting for the average cost of financing charger installation over a one-year period, home charging was 2% (Q2: 2%) more expensive.

In February 2026, ZapMap 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 123,677 EV chargers installed to date (Q2: 121,262), which is 41.23% of the Government's target for 300,000 charging points by 2030.

Upkeep | Average Score: 60 (Q2: 60)

EVs continue to compare favourably with petrol vehicles on upkeep and maintenance.

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

- 88.1% (Q1: 88.4%) of EV callouts were fixed at the roadside, compared with 83.5% (Q1: 84.6%) of petrol vehicles.

Running out of charge accounted for 1.3% (Q2: 1.2%) 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
= 57 (+4)**



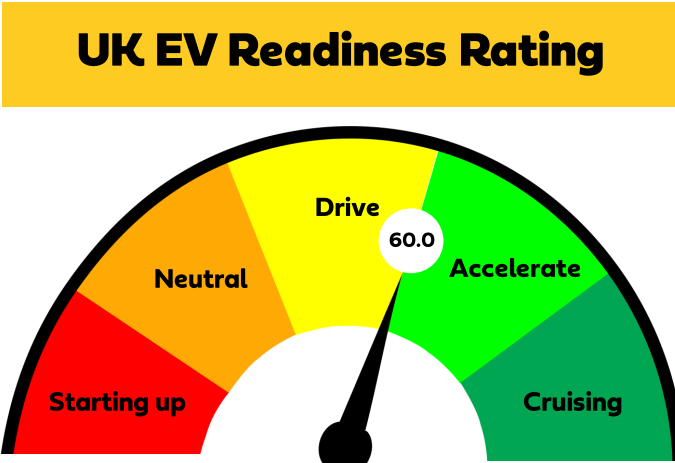
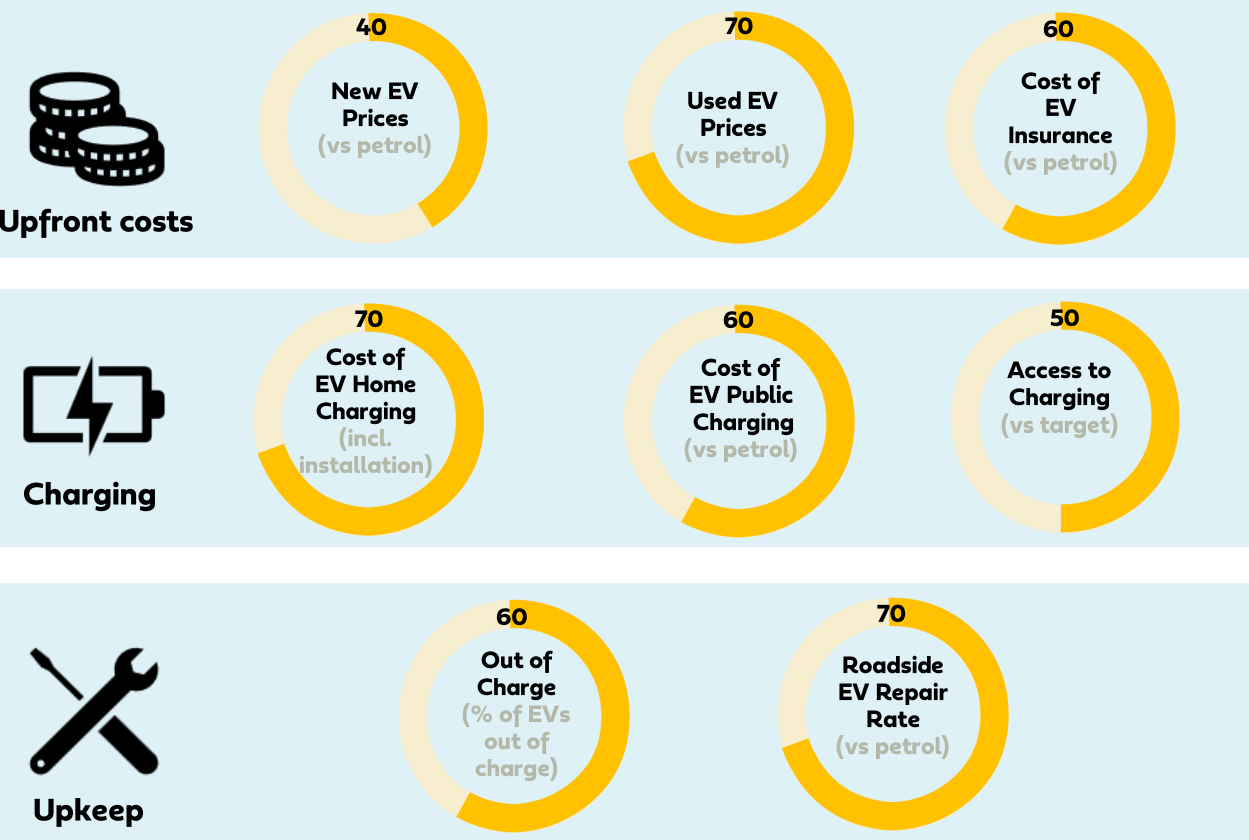
**Charging
Average
= 60**



**Upkeep
Average
= 60**

UK EV Readiness Index Q3 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 July 2026 to September 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 Q3 Readiness Index highlights the significant impact of continued 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. We also examine one of the biggest changes taking place in the UK car market – the rapid expansion of Chinese manufacturers.

Whilst consumers have mixed views on Chinese brands, their share of the UK new car market has increased almost threefold in the last year.

The rapid growth of Chinese car imports, including lower cost electric vehicles, is driving a structural shift in the UK automotive market. The AA's latest polling of UK drivers highlights hesitancy towards Chinese brands, although motorists are uncertain if traditional manufacturers retain a clear advantage on quality. The findings point to a market in transition, as Chinese entrants still face a trust deficit, while the perceived quality gap with established brands is narrowing.¹

The UK is the largest European market for Chinese brands, which captured 15.8% of new vehicle sales in August 2026, almost triple the 5.5% share of vehicles sold a year earlier.² Three of the top four selling models for the month were Chinese-owned SUVs; the Jaecoo 7 and MG HS, which are available as petrol or hybrids, and Jaecoo 5, which is petrol.

This growth reflects a wider shift in the global automotive industry. Following a visit to Auto China 2026 in Beijing, Dean Keeling, AA Managing Director Roadside Services, found the pace of Chinese innovation “exciting

and scary”, as car manufacturers lower the cost and development time for new vehicles.

Despite the growth in new car sales, with the majority typically purchased by fleets, UK consumers remain hesitant. Although more than a quarter of drivers would consider purchasing a car made by a Chinese manufacture, 42% of drivers would not, of which 16% would ‘never’ purchase a Chinese made car. This includes a clear generational divide, with 40% of 18–24-year-olds open to buying a Chinese car, compared with just 22% of those aged 65–74.

While Chinese cars are widely seen to be more affordable, there remains significant concerns around data. Only 3% think that data captured in a vehicle would be handled better and safer with a Chinese manufacturer over an established brand.

However, perceptions of Chinese cars as lower quality, historically a significant barrier to adoption, appear to be weakening. While a quarter of drivers think that the quality of established brands is better than Chinese, 66% are

unsure, and 77% do not have a view on whether Chinese cars are safer.

Importantly, drivers are receptive to a more contested marketplace, with 47% believing that competition between Chinese and established brands will benefit consumers. With the erosion of traditional brand loyalty, this creates pressure and opportunity for manufactures to win over drivers; almost a third of drivers think that established brands need to do more to persuade them to buy.

¹ Yonder received 10,594 responses from AA members to its online poll between the 18th - 24th June 2026. Yonder is a member of the British Polling Council and abides by its rules.

² SMMT: [UK Car Registrations](#); The Observer: [Chinese brands powering into Britain are driving a carmaking crisis](#)

³ SMMT: [UK Car Registrations](#)



“Chinese manufacturers are bringing increasingly sophisticated, competitively priced vehicles to market at a speed that should make the established automotive industry sit up and take notice.” – Dean Keeling, AA Managing Director Roadside Services

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.*

