LCPDelta

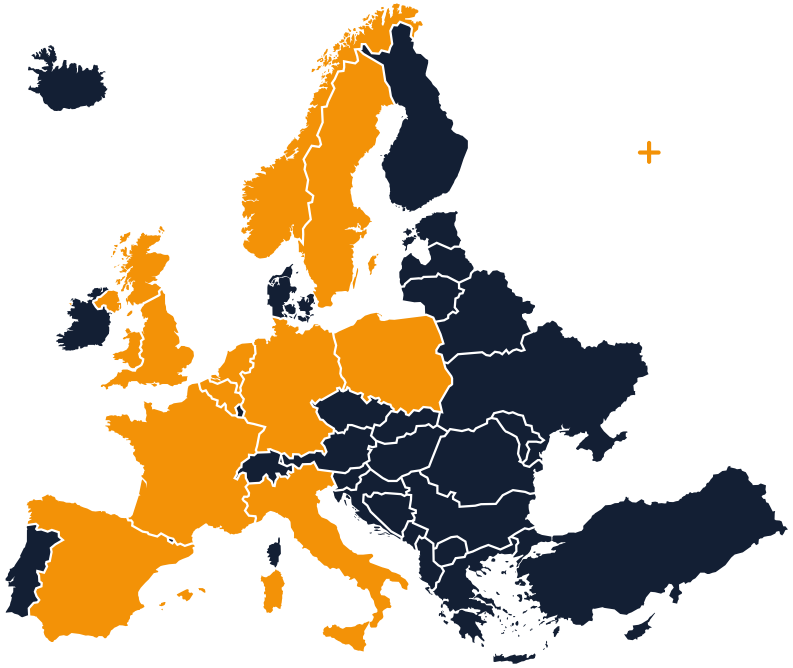
The EV Driver Survey 2025

Insights from 3,900 European EV owners across ten countries

Introduction

Electric vehicle (EV) adoption is reshaping Europe's automotive and energy landscape. For the past **seven years**, LCP Delta has tracked this transformation through our annual EV Driver Survey, surveying **over 12,000 EV drivers** to build up a long-running evidence base on drivers' attitudes, charging habits and vehicle choices.

The 2025 Pan-European EV Driver Survey is our most comprehensive to date, based on the experiences of EV owners across ten countries. This year we expanded the study to include Poland, alongside Belgium, France, Germany, Italy, Netherlands, Norway, Spain, Sweden and the UK.



Survey Methodology

The research was carried out in May and June 2025 by Sapio Research, using online questionnaires distributed to panels of current EV drivers. Respondents included both battery electric vehicle (BEV) and plug-in hybrid vehicle (PHEV) owners or primary users.

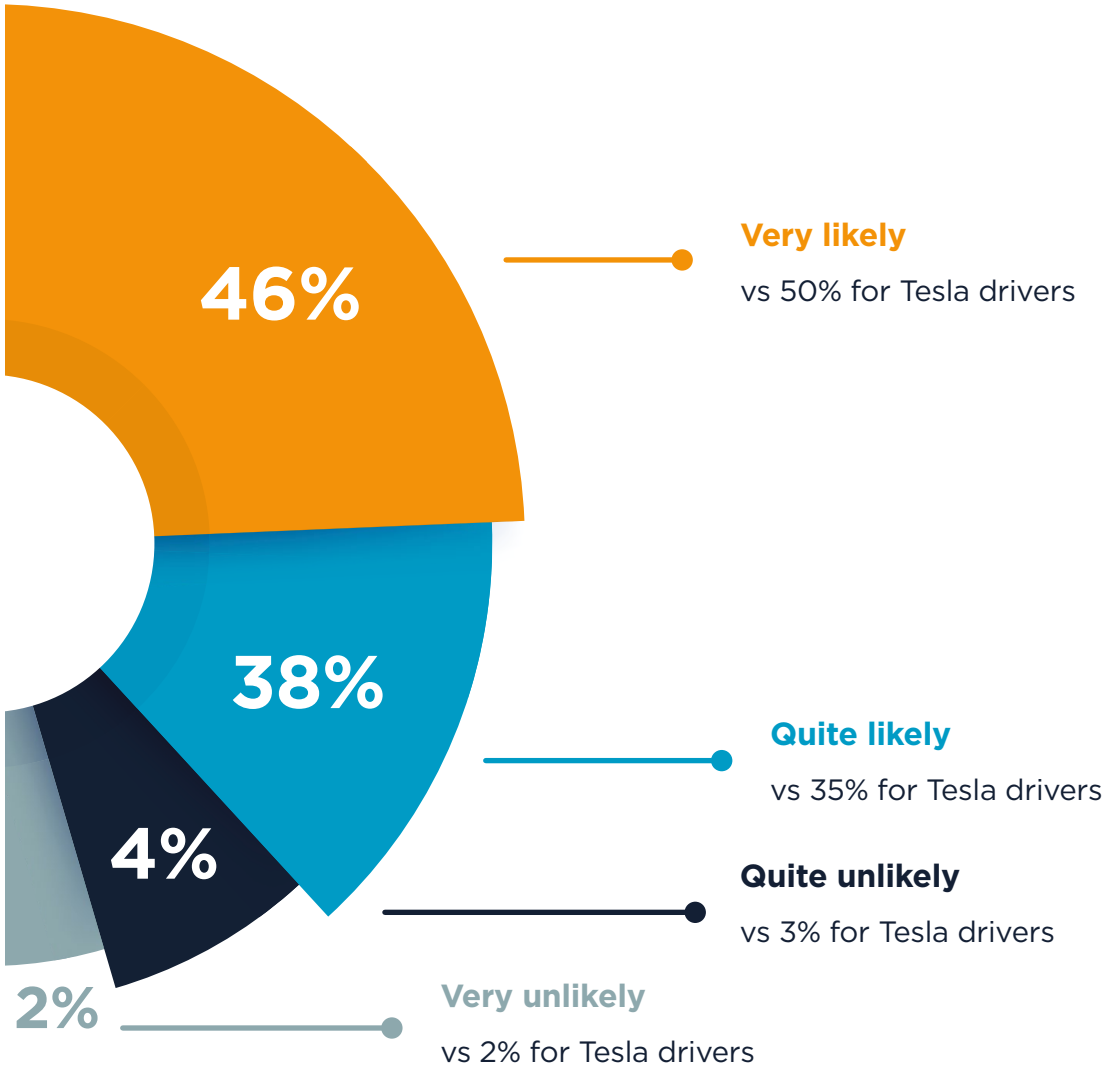
The 2025 sample size of **3,900 drivers** - approximately 400 in each country (with 300 in Belgium)- ensures broad representation of national EV owner populations.

Findings presented here highlight pan-European trends while also drawing out national differences where relevant.

Key Findings

1. EV brand loyalty: A competitive but sticky market

Brand loyalty among European EV owners is proving resilient, **with 84% saying they are likely to buy their next car from the same manufacturer. Tesla shows a modest edge, 85% of its drivers are either 'quite likely' or 'very likely' to repurchase, with 50% falling into the 'very likely' category, compared with an average of 46% across all EV brands**. This is notable given the heightened public debate around Tesla and Elon Musk's role as CEO; while such controversies may affect perceptions among potential buyers, they appear to have done little to erode loyalty among this panel of existing owners. Within the survey panel, established European, Japanese and Korean brands still dominate overall ownership, yet more broadly in the market we are seeing Chinese newcomers such as BYD rapidly gaining ground, with early 2025 sales growth outpacing several legacy players. For automakers, the priority is shifting; **winning first-time EV buyers remains vital, but long-term success will depend on building loyalty through continuous product innovation and an ownership experience that keeps customers coming back.**



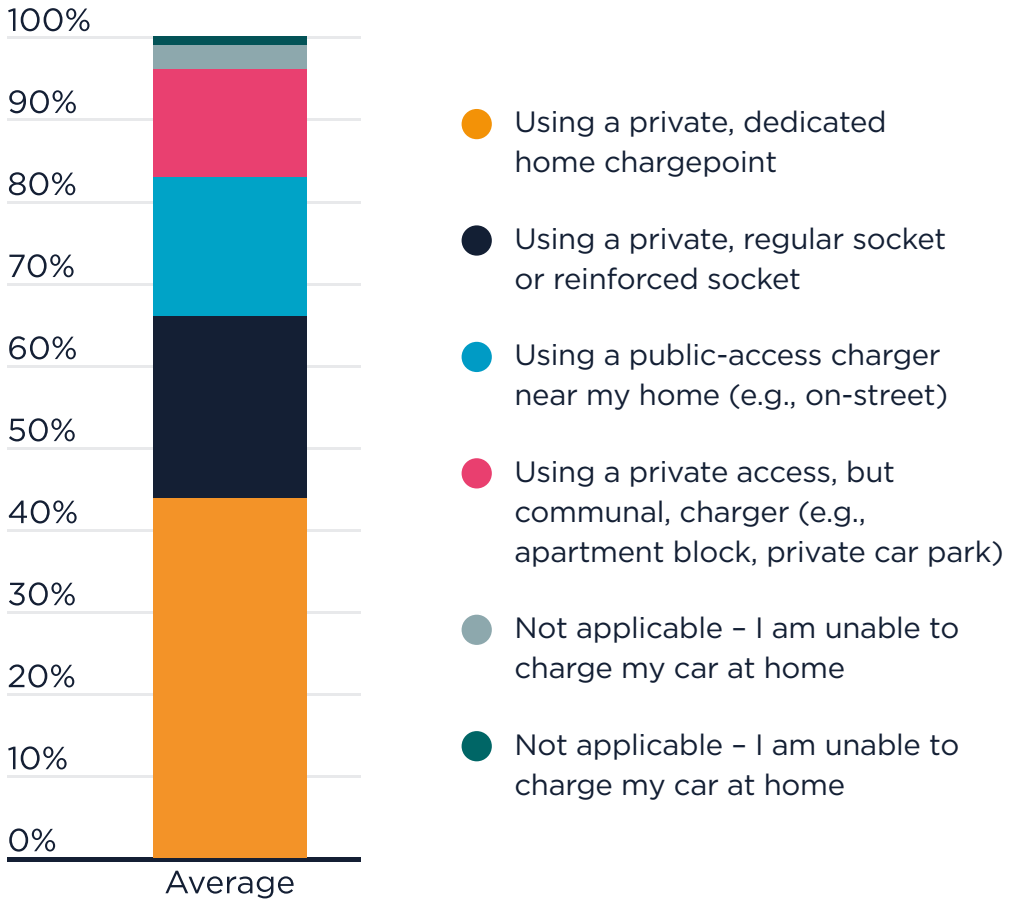
Key Findings

2. The central role of home charging - with important alternatives

Charging at home remains the cornerstone of EV ownership. **Around two-thirds of drivers charge primarily at home, with:**

- **44% using a dedicated home charger,**
- **21% plugging into a standard domestic socket,**
- **17% relying on nearby public on-street chargers, and**
- **13% using shared facilities in apartment blocks or workplaces.**

Home charging method by market



Key Findings

2. The central role of home charging - with important alternatives

Only around **4% of EV owners in our survey currently have no access to home charging**, highlighting how central residential charging remains to the EV experience. Most early adopters have benefited from the convenience and control that private charging offers, shaping their overall satisfaction and charging habits.

Socket charging continues to play a notable role. About one in five drivers still rely on a standard or reinforced mains outlet at home rather than a dedicated charge point. This approach suits lower-mileage routines and regular overnight top-ups but comes with slower charging speeds. Many of these drivers are likely to upgrade to dedicated chargers over time as their mileage grows, their confidence with EV ownership increases, or installation processes become simpler and more widely supported.

France stands out as a market where socket charging is particularly common. With nuclear energy supplying around 70% of the country's electricity, prices have stayed relatively stable. Many French EV owners therefore see socket charging as sufficient, reducing the urgency to install faster or smarter home chargers unless they specifically want features such as scheduled charging or app-based monitoring.

The distribution of **dedicated home chargepoint use varies significantly across Europe**, reflecting differences in housing and infrastructure. **Northern European countries with higher rates of single-family homes** see greater uptake of private chargers, while **Southern and Eastern markets, where apartment living is more common, rely more on on-street and shared charging**.

While **home charging** remains the **backbone of EV convenience, expanding shared and public charging access is essential** to drive EV adoption among those who cannot install a home charger. Public charging also plays a critical role as a **safety net**, offering flexibility for longer journeys and backup when home charging is unavailable.

However, today's public charging experience remains **fragmented**. Most drivers juggle multiple apps and cards, and fewer than one in five hold a paid subscription. Their preferred card or app is usually chosen based on **cheaper pricing (31%), proximity to home or work (30%), or broader coverage (29%)**. When deciding where to plug in, drivers focus on **charging speed (53%), price (50%) and convenient location (45%)**, with reliability (36%) and amenities (23%) valued but secondary. This reflects an established expectation that public charging should feel more like a petrol station: **fast, affordable and easy to use**. Delivering **reliable near-home AC and well-placed urban DC hubs**, combined with **transparent pricing and seamless payments**, will be crucial to winning trust and serving drivers without driveways.

Key Findings

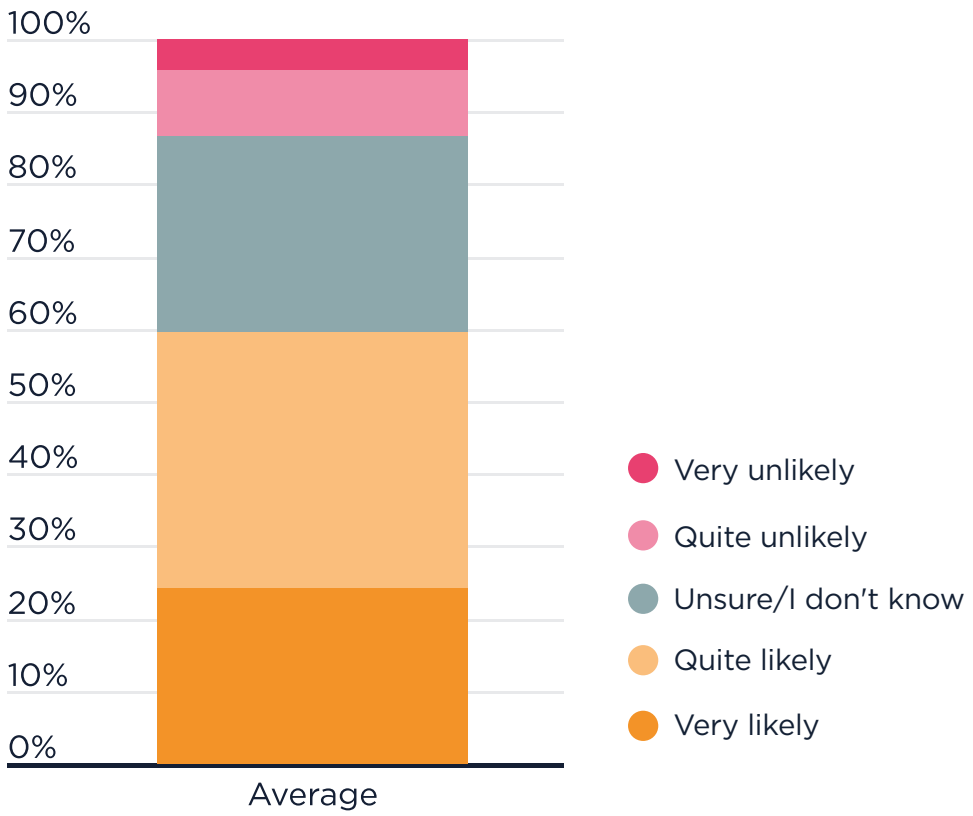
3. Chinese brands: Growing curiosity and market openness

A striking result from this year's survey is the **broad openness to Chinese EV brands.** Across Europe, **59% of drivers say they would consider a Chinese brand of EV for their next purchase** (24% "very likely," 35% "quite likely").

Receptiveness is particularly high in the UK, Spain and Poland, where around three-quarters of EV drivers are open to Chinese brands. By contrast, enthusiasm is more cautious in markets such as Sweden and Norway, where less than half of drivers express interest and many remain undecided.

Price competitiveness and strong feature sets are clear draws. However, a significant proportion of respondents (27%) remain "unsure," reflecting limited exposure to Chinese vehicles in showrooms or on the road. For new entrants such as BYD, Omoda and XPeng, this undecided segment represents the battleground: building familiarity and trust could convert a large share of hesitant drivers into buyers.

Willingness to consider a Chinese brand for next car purchase/lease



Key Findings

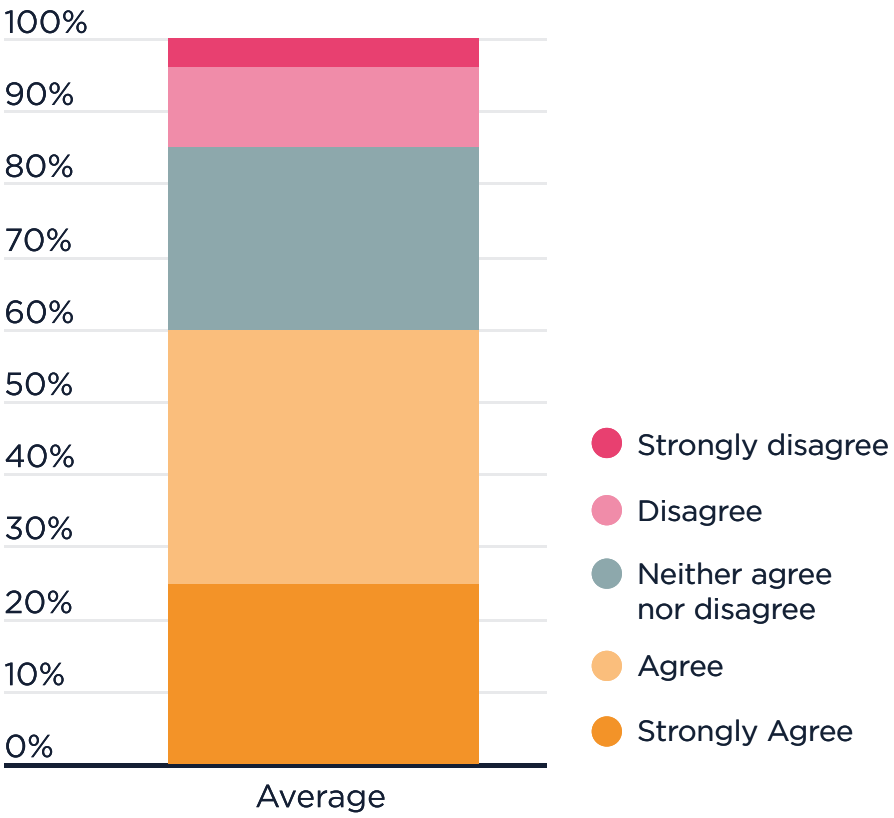
4. “Never going back”: EV satisfaction and permanence

The survey suggests that **EV ownership is becoming a lasting choice rather than a temporary experiment**. The majority of European EV owners (**60%**) say they would not buy a petrol or diesel car again, while only **15% say they would and 25% remain undecided.**

National differences highlight how this sentiment strengthens as markets mature. In France, nearly 70% of EV drivers say they would not return to combustion, with only 10% saying they would and 20% undecided, while in earlier-stage markets such as Poland the share is slightly lower, reflecting the newer stage of adoption and less established familiarity with EVs.

These findings suggest that as **experience with EVs grows, satisfaction increases and reluctance to return to combustion fades**, indicating that many early adopters are set to become long-term ambassadors for electric mobility.

EV satisfaction and retention



Key Findings

5. Smart charging and energy engagement

Although access to private garages, driveways or carports has declined from 75% of EV drivers in 2023 to 61% in 2025 (and is expected to fall further), **home charging remains the norm**. Around two-thirds of drivers still plug in overnight, whether from a dedicated chargepoint, a regular household socket, or other near-home arrangements. For many with off-street parking, this enables smart charging behaviours such as aligning overnight charging with low-cost tariffs or peaks in renewable energy.

Many drivers with this access say they are willing to charge more intelligently - seven in ten would shift to off-peak times, two-thirds are interested in vehicle-to-grid services, and over half say they would allow automated control if their car is ready on time. **However, only 48% are willing to keep their EV plugged in for extended periods when it does not need charging, and 66% say they override their scheduled charging at least sometimes.** These behaviours limit the potential for smart charging and vehicle-to-grid participation. **Building greater trust, along with simple and reliable tools, will be essential to turn willingness into real behaviour change**.

As access to private parking declines, these challenges will grow. Drivers without their own charger will have fewer opportunities to plan or automate charging, making it even more important to expand smart-ready shared and on-street infrastructure.

To unlock the next wave of adoption, communal and street-based charging must become as reliable and convenient as home charging. Well-designed platforms will be key, offering real-time optimisation, intuitive interfaces and seamless integration with tariffs and vehicle data.

Key Findings

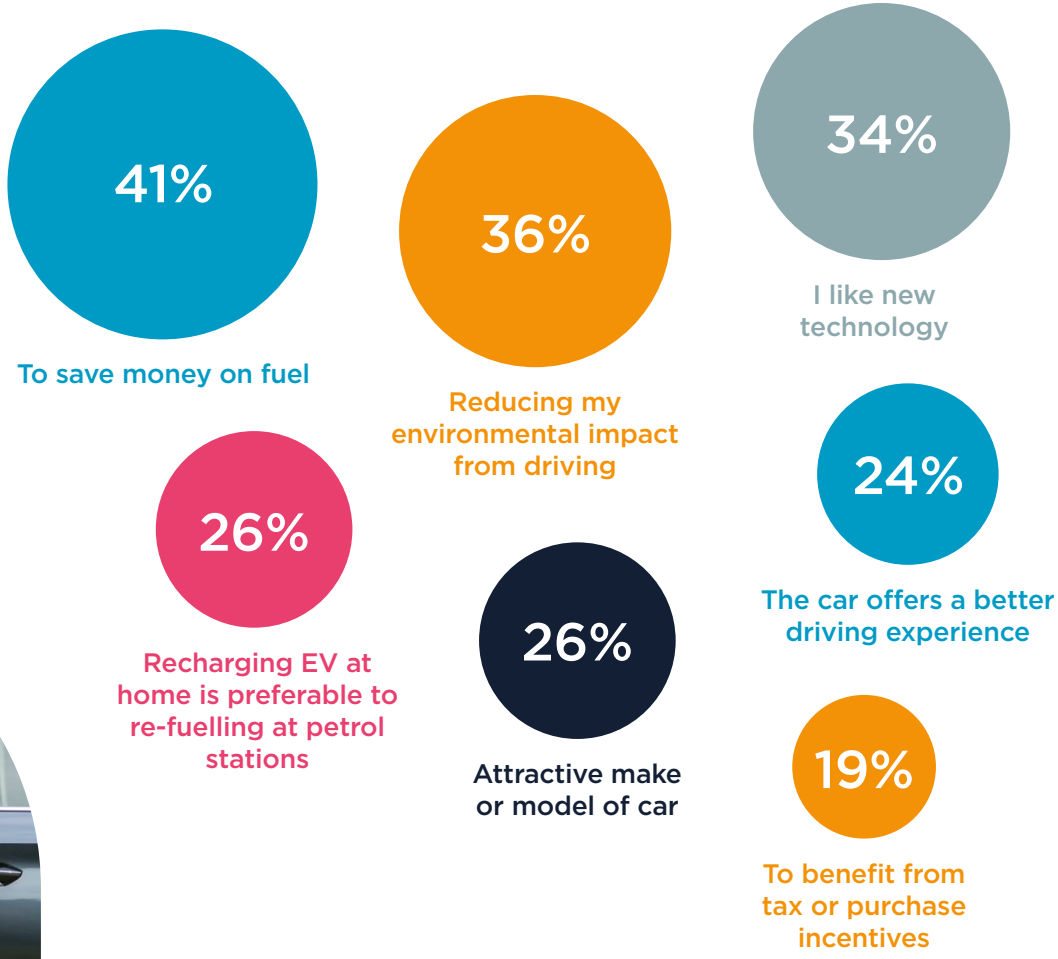
6. Practical and personal benefits drive EV adoption

Why do drivers switch to EVs? The survey reveals a blend of rational and emotional motivations:

- **41% cite lower fuel costs** as their top reason.
- **36% highlight environmental benefits** such as reduced emissions.
- **34% are motivated by new technology and innovation**.
- **26% value the convenience of charging at home**, avoiding trips to petrol stations.
- Others are drawn by specific makes or models that appeal to them.

EV adoption is now driven as much by cost, convenience and car appeal as by environmental values or incentives, signalling a shift into the mainstream.

Top motivations for buying an EV



Conclusion

The 2025 Pan-European EV Driver Survey shows a market shifting from early adoption to mass uptake. **EV drivers are loyal, satisfied and ready to engage with the energy system, but the conditions that supported early adoption are starting to change.**

Home charging remains widespread but will become less common as ownership expands beyond early adopters and the early majority and more drivers live without private parking. Chinese brands are gaining ground, challenging long-established European, Japanese and Korean players. **Drivers are open to smart charging and energy services, yet most still charge manually**, which shows that **trust, simplicity and reliability will determine how quickly these behaviours scale.**

Winning first-time EV buyers is no longer enough. **Automakers must lock in loyalty through exceptional ownership experiences. Energy providers must make smart charging seamless and widely accessible. Policymakers must accelerate the rollout of shared and street-based infrastructure.**

Thank you for reading

For further information please contact our team.

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