Perceptions of electric cars are radically different depending on who you ask – what separates EV owners and combustion engine advocates in 2024?

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EXECUTIVE SUMMARY

The motor industry has moved into a new era of its evolution, driven by rapid technological advancements and a growing need to make transport more sustainable and less polluting.

We will all soon be driving battery electric vehicles (BEV) or other alternatively fuelled cars – this transition is inevitable, and the shift is already in motion as technology progresses and more electric car models and alternative powertrains are introduced.

Uptake is likely to continue to increase as consumers are offered greater choice and electric vehicle infrastructure continues to improve. However, opinions regarding fully electric cars are more divided than just a few years' ago, which has put the brakes on previously rapid growth.

Fostering more informed dialogue surrounding electric cars and the future of automotive mobility will be key to helping non-EV owners to make the switch. This report has identified several findings, including:

- This report discovered significant differences between non-EV owner perceptions and the concerns of those with actual experience.
- Our survey found that 63% of non-EV CUPRA owners are not yet convinced or are not looking to switch in the near future.
- However, seven in 10 people say they will be driving a fully electric car within the next 10 years. For the vast majority, EV-ownership is inevitable.
- 94% of CUPRA EV owners are happy that they switched to an EV – and zero CUPRA EV owners said that they would go back to a petrol or diesel car
- When drivers were asked about charging EVs, only 5% of CUPRA EV owners were concerned about how charging affects their day-to-day routine. This compares to 37% of non-EV owners.
- When it comes to aftersales (the post-purchase experience including servicing and maintenance), non-EV owners tend to overestimate how often an EV would need to be serviced.

INTRODUCTION

Opinions regarding battery electric vehicles (BEVs) are as polarised as ever. Stark differences remain between non-EV owner perceptions and those with actual experience: non-EV owners are increasingly sceptical, but existing owners tend to love their electric cars.

This has led to a cooling off in interest in electric cars in the UK. While EV uptake reached a record volume in 2023 – up by almost 50,000 units compared to 2022 – their market share slipped to 16.5% from 16.6% in 2022. For the previous several years, we saw significant year-on-year growth in EV sales. Attitudes, however, are dynamic and are often fast changing.

As we find ourselves in 2024, the contrast between EV advocates and staunch combustion engine supporters has intensified. What sets these two groups apart, and what factors influence their perspectives?

With the initial enthusiasm surrounding EVs perhaps waning slightly, it is important to evaluate the current sentiment and experiences shaping consumer attitudes towards electric mobility. Understanding different perceptions of electric vehicles could unlock additional demand for EVs in 2024.

This report aims to explore the opinions of EV owners and non-owners, shedding light on the factors driving this split.

Our research seeks to address the following key areas:

1. **Current sentiment towards fully electric vehicles**: Unravelling the prevailing attitudes towards BEVs.
2. **Barriers to switching**: Identifying potential impediments preventing consumers from switching to BEVs.
3. **Charging experiences and expectations**: Evaluating user experiences of infrastructure and perceptions of non-BEV owners.
4. **Aftersales experiences and expectations**: Reviewing the post-purchase support and service experiences of BEV owners and expectations of ICE car drivers.

CUPRA, combined with other Volkswagen Group brands, has surveyed 377 drivers, examining the above aspects to understand how to effectively communicate the benefits of EV ownership and the high satisfaction levels reported by existing EV owners.

CONTEXT: THE SHIFT AWAY FROM CARS WITH DIESEL OR PETROL ENGINES IS A GLOBAL – AND A LOCAL – CHALLENGE

The past four years have seen consumers and the automotive industry contend with multiple challenges, including the threat of global recession, the COVID-19 pandemic, war in Europe, continuing supply chain difficulties, a challenging labour market and rising interest rates.

Grappling with any one of these issues represents a major challenge but tackling all of them as we transition away from petrol- and diesel-powered cars is a huge test for not only the automotive industry but for society itself.

While the mix of cars in the UK already looks radically different than just three years ago, the Society of Motor Manufacturers and Traders (SMMT) reported that electric car sales in 2023 declined slightly to 16.5% [i] of the UK's new car market. However, while uptake of BEVs in the UK slowed in terms of market share in 2023, more units were sold in total.

Part of the problem is a lack of informed dialogue and the outsized impact of extremely vocal anti-EV rhetoric, but we are also seeing mixed signals from the UK government.

The same anti-EV sentiment intensified ahead of the recent decision to delay the ban on new petrol and diesel car sales. In September 2023, the government announcement that the ban on new fossil fuel cars is being put back five years, from 2030 as planned previously, to 2035.

Delaying the ban has broad support among petrol and diesel car owners across all brands surveyed, but most EV owners lament the decision and fear it will only slow adoption and investment in infrastructure.

This is happening in parallel with the government mandating that this year 22% of all new cars sold by car manufacturers must be zero emission[ii]. Last year, EV sales represented 16.5% of the market – a figure which did not grow at all during 2023 and was actually a worse result than in 2022.

SURVEY BACKGROUND

The survey researched the views of 377 CUPRA drivers as part of the wider Volkswagen Group customer panel, that also included Volkswagen, Audi and Skoda drivers with a roughly even mix of EV owners and non-owners who currently drive diesel or petrol cars. The report wanted to ascertain the opinions of those with ownership experience and those without a real-world, hands-on understanding of EV ownership to identify the dividing lines among UK drivers.

This analysis will help us to understand the areas of concern for those who do not yet own an EV and the lived experience of EV drivers. The areas chosen to examine in detail include: current sentiment towards fully electric vehicles, the apparent barriers to switching, EV charging experiences and expectations, and the aftersales experiences and expectations.

CUPRA became a standalone brand in 2018 and is now established as one of the fastest growing car manufacturers in Europe. With a focus on design appeal and performance, it is also setting standards in the development of its thrilling electric cars, including the CUPRA Born. Formerly a performance sub-brand of SEAT, CUPRA is a separate entity and sits inside the Volkswagen Group of brands.

Following the analysis, the new understanding will help us to foster a more inclusive and informed dialogue surrounding the future of automotive mobility and EV ownership specifically.

SURVEY FINDINGS

Current sentiment towards fully electric vehicles

The research and subsequent analysis has found significant differences in general sentiment towards electric cars between EV owners and non-owners. Bridging the gap may not be easy, but examining the divide can help clarify misconceptions, shedding light on what is influencing their choices.

As the UK rapidly transitions towards sustainable mobility solutions, it is important to understand the motivations and hesitations of consumers regarding electric vehicle adoption.

One significant finding underscores the loyalty of EV owners: once customers make the switch to an EV, they tend to remain steadfast in their choice. In fact, 94% of CUPRA EV drivers expressed satisfaction with their decision to transition to an electric car, reflecting positively on the ownership and driving experiences, as well as the reduced environmental impact.

However, a significant proportion of non-EV owners remain undecided or hesitant about switching. Among non-battery electric vehicle (BEV) CUPRA owners, 63% indicate they are either not convinced or not yet considering a transition to EVs. This may be because they view the barriers to entry as too high. The data also found that 35% of non-EV CUPRA owners would consider having an EV as their next vehicle – an encouraging but relatively low figure.

Despite this hesitation, a revealing trend emerges from the data: the anticipation of future EV adoption is clear: seven in 10 owners of non-EV CUPRA models anticipate themselves driving an EV within the next decade, indicating that while general sentiment towards EVs is mixed, many people feel that EV ownership is inevitable and that they imagine themselves driving an EV within the timeframe of the 2035 ban on new petrol or diesel car sales.

While the majority remain open to switching, there's a general sense the recent decision to move back the ban affords people more time. Differences are revealed in the age groups of those surveyed, too. While 35% of non-EV CUPRA owners said they would consider having an EV as their next vehicle, younger motorists envisage EV ownership in the nearer term, with this figure rising to 42% amongst non-EV CUPRA owners aged 18-34.

The proportion of people saying they're not looking to switch correlates strongly with age too. Just 22% of those under 35 said they will not be making the switch to an EV in the near future, but this figure is 32% for all age groups of CUPRA respondents. This rises gradually and peaks at 49% for those aged 65+ who are non-EV CUPRA owners.

CUPRA's research also uncovered differences in the general sentiment towards certain electric car characteristics, with EV owners perceiving them to have a prestige feel. Current CUPRA EV owners praise their vehicles for traits like premium feel, innovation, and seamless integration of software and apps. Non-EV owners associated EVs with leading edge design, being more environmentally friendly (than petrol or diesel cars) and, as with EV owners, innovation. But while both EV owners and non-owners associated EVs with being more expensive to buy than petrol or diesel cars, significantly more non-EV owners perceive the purchase price of electric cars to be higher.

Ascertaining the motivations and sentiment influencing consumer choices can be helpful in communicating the strengths of EVs more effectively; leveraging the insights may help to convince those who are undecided about making the switch.

Helping to provide a simple and informative experience for exploring electric vehicles online, CUPRA has integrated various digital tools on its website, enabling consumers to make more confident decisions. It offers a range calculator[iii], various 'how to' videos[iv], owner testimonials, and approachable information on home charging and wallboxes[v]. Arriving later in 2024, CUPRA will also incorporate a charge point map.

Helping to smooth the transition to electric vehicles and increase convenience, the My CUPRA app also enables CUPRA EV owners to control their vehicle remotely, including monitoring the charge status of their vehicle, pre-setting charge times and activating heating or air conditioning.

Perceived barriers to switching remain

The research has tried to identify potential impediments that could be preventing consumers from switching to EVs, and why scepticism may have increased.

Range, infrastructure, and purchase cost top the list of reasons why people remain hesitant about making the switch – and these are issues, to some extent, that EV owners are still grappling with.

Over three quarters (79%) of respondents (CUPRA EV owners and non-owners) said that charging infrastructure is a concern, rising to 87% for non-EV owners. The initial purchase price was seen as the next most common concern among all respondents, with 75% saying it was an issue. That figure rises to 79% when reviewing non-EV owners only.

Looking more closely at EV range, unlike with petrol and diesel cars, the distance an EV can travel on a single charge is seen as pivotal, despite average journey distances being just 8.4 miles according to government figures [vi]. When asked about EV range and whether drivers were concerned about it, only 41% of CUPRA EV owners said it was an issue, whereas 74% of non-EV owners raised it as a concern.

More than 70% of non-EV owners said that queuing and waiting times for public chargers was a concern, suggesting that this could be significant barrier to entry. There's a perception that charging takes longer than it does in reality and that drivers will usually have to wait. However, EV-owners are less likely to cite this as a worry, with 50% saying it was an issue. While this is lower than for non-EV owners it suggests there's a long way to go when it comes to infrastructure.

Perhaps explaining why EV-owners see queuing to charge as less of an issue is because the survey found that only 8% of EV drivers said that 'how often you need to charge' is a concern. The reality is that drivers don't need to charge their vehicles very often. And only 2% of CUPRA EV owners said that the logistics of charging at home is an issue.

But EV ownership still feels like an 'inconvenience' for some. While this is the case, disparity in prices (EV vs. petrol or diesel equivalent) and concerns about charging infrastructure are likely to remain key challenges. Even if buyers can be convinced about these issues, there appears to be a lack of 'pull factors' with EVs themselves. But while the sustainability message, in itself, is not compelling enough, as discussed previously, 94% of CUPRA EV owners are happy that they made the switch to an electric car. This means that for most people the perceived barriers don't translate into the ownership experience.

These findings are perhaps more entrenched than before recent scepticism increased. There is work to do in persisting with challenging these concerns and convincing customers that it is already viable to move into a fully electric vehicle – as evidenced by the satisfaction levels of those who have already made the switch.

Charging experiences and expectations of owners and non-EV owners

CUPRA's comprehensive research shows that the contrasting perspectives of electric vehicle owners and non-owners continues when it comes to charging experiences and expectations; a pivotal factor shaping attitudes towards electric mobility.

EV owners and non-owners have divergent outlooks on charging, suggesting that it shouldn't be as big a barrier as it is perceived to be. When asking drivers about charging EVs and the impact this has (or would have) on their lives, only 5% of CUPRA EV owners were concerned about how charging affects their day-to-day routine. This compares to 37% of non-EV owners, highlighting the need for those who are sceptical about the real-world nature of charging an EV to gain practical experience of living with an electric car.

CUPRA's findings emphasise the importance of ownership experience on charging-related concerns. EV owners' perceptions also show that anxieties regarding charger availability, battery degradation, and journey planning can be alleviated with experience, suggesting a learning curve that minimises initial uncertainties.

However, differences persist in certain aspects of charging that drivers, particularly non-EV owners, remain apprehensive or uninformed about. And existing owners are still concerned about some aspects of charging their EVs.

For instance, while 54% of EV owners are concerned or not fully informed about the number of public chargers available, this rises to 72% of non-EV owners. Public charger availability is still a big issue for all parties, highlighting the need for continued investment.

Similarly, concerns around having to make additional arrangements for charging when journey planning and battery degradation are also more prevalent among non-EV owners, reflecting a need for targeted education.

A little over a third of EV owners (38%) feel uninformed or concerned about having to plan or add stops to journeys, compared to 66% of non-EV owner. As with public charging infrastructure, there is a big difference in sentiment but even for EV-owners, there is still some concern.

Battery life has been a hot topic in the press and amongst commentators. Perhaps unsurprisingly, the survey found that concerns about a vehicle's battery degrading over time also differed, with 29% of EV owners and 60% non-owners saying they were worried or didn't feel educated about the issue.

Perceptions regarding the frequency and duration of charging also differ between EV owners from non-owners. Over half (55%) of CUPRA EV owners report never needing smaller 'top-up' charges at work or in public, underlining the convenience and efficiency of home charging solutions. In contrast, 48% of non-EV owners anticipate needing to utilise public chargers for top-ups or full charges at least once a week.

This aspect of CUPRA's research again highlights the imperative for education and informed debate. But also shows that even for EV owners, the charging ecosystem, including infrastructure development, needs to improve. With the latter improving every year and by addressing misconceptions, it may be possible to bridge the gap in perceptions.

Continuity in post-purchase (aftersales) support is key

The post-purchase support and service/maintenance experiences (aftersales) of EV owners and expectations of petrol or diesel car drivers has been talked about less than other areas of EV ownership.

The research, again, has established that there are significant differences between those with lived experience and those who have not yet owned an EV. However, this is an area which EV owners also feel uninformed about. This could be because they have not yet owned the vehicle long enough to be familiar about this aspect of EV ownership. Perhaps unsurprisingly, battery maintenance is the main 'unknown' for EV owners and non-owners.

The main areas which owners and non-owners felt concerned or uninformed about were the life span of the battery, with 42% of owners saying it's an issue compared to 65% of non-owners, how much an EV service costs (41% vs 50% for CUPRA owners and non-owners respectively), and checking the health of the vehicle battery. Helping to provide peace of mind and transparency for prospective used car buyers, every used CUPRA EV or plugin hybrid electric vehicle (PHEV) sold through the CUPRA dealer network comes with a battery health report.

When it comes to maintenance, non-EV owners tend to overestimate how often an EV would need to be serviced, contrasting with the experiences of EV owners and manufacturer service schedules. When asked how often they expect to have an EV serviced, just 28% of EV-owners expect the need for a service every year whereas 59% of non-owners anticipate at least an annual service. Most (60%) EV-owners think they'll need a service every other year, compared to only a quarter (26%) of non-owners who anticipate more frequent maintenance.

While a quarter (24%) of customers aren't sure (including EV owners), on balance, people expect EV servicing will cost less than an equivalent petrol or diesel car. When asked about the costs, overall 39% of people thought EV servicing would be cheaper, compared to 17% who thought it would be more expensive.

When examining the difference between EV owners and non-owners, more EV owners thought servicing would be less expensive than for traditional cars, with 48% of EV owners saying it would cost at least 5% less, while 34% of non-EV owners had the same opinion. Over a third (36%) of EV owners said servicing would cost at least 20% less than the petrol or diesel equivalent.

The same is true for battery health checks and certification, with non-EV owners assuming they'll be needed more often than EV owners. Many drivers, including some EV owners, did not know that having a battery health check was an option. A battery health check can be reassuring for owners, giving them more confidence that battery degradation is far more gradual than many people think.

The post-sale experience proved to be an area which was more closely matched in terms of perceptions between EV owners and non-owners, with some doubts about the requirements, frequency and cost of maintenance. This could be due to the fact that many EV owners have not had their vehicles for long enough to experience the servicing customer journey. But despite this, disparities still remain in their outlook, with non-owners taking a more pessimistic stance than existing owners.

CONCLUSION

A clear gap exists between the lived experience of EV owners and the expectations and perceptions of non-owners. Given recent negative publicity and slower sales growth, the evidence suggests that non-EV owners are increasingly sceptical, which contrasts with existing owners who tend to love their electric cars once they've experienced owning one.

The statistics speak for themselves – 94% of CUPRA EV owners said that they were happy with their decision to transition to an electrified vehicle.

Dispelling myths and helping people to overcome their reservations is the biggest challenge facing increased EV uptake. Irrespective of their current outlook, the vast majority (seven in 10) of non-EV owners see themselves driving an EV in the next 10 years – a figure that is set to rise given the satisfaction levels of those who have made the switch.

Even with significant perceived barriers to entry, including range, charging infrastructure and a lack of knowledge about what the aftersales experience entails, the shift away from diesel and petrol cars is inevitable.

This report highlights the importance of showcasing the benefits of EV ownership. CUPRA aims to make the transition to EVs as seamless as possible for drivers, helping the UK move towards more sustainable mobility solutions.

References

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