

HERE-SBD 2026 EV perception report

Unlocking the next phase of EV adoption

How driver confidence will shape the EV transition

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1 Executive summary

The global electric vehicle (EV) market is moving beyond early technology hype to a more mature growth phase. As daily use replaces novelty appeal, real-world ownership needs are defining consumer demand. Mainstream consumers are giving more weight to cost, convenience and confidence in the charging experience, and increasingly expect EVs to be as easy and dependable to use as vehicles with an internal combustion engine fueled by gasoline or diesel.

But EV adoption is not following the same path everywhere: infrastructure readiness, vehicle affordability, policy support and consumer expectations vary by region. For the market to keep growing, affordable EV options and charging infrastructure will need to advance together, making the shift to electric easier and less disruptive for drivers.

Co-developed by HERE Technologies, a leading mapping and location data company, and SBD Automotive, a global automotive research firm, the HERE-SBD EV Index 2026 provides a comprehensive view of the EV marketplace across several global markets. This report evaluates EV market readiness and advancement by bringing together two streams of research into a unified framework.

The first stream of research is our proprietary maturity data, which covers 50 US states and Washington, D.C., 30 European countries, 34 Indian states and union territories and, for the first time, eight Australian states and territories. This maturity data is what we use to create the index, which assesses, compares and ranks markets according to their EV adoption levels and market readiness, using four equally weighted, driver-centered metrics.

The second is a consumer survey that captures how drivers experience car ownership, what influences their decision to switch to an EV and how they perceive and use charging networks. More than 4,000 drivers across the US, France, Germany, Italy, Spain, the UK, India and Australia participated in the survey. Throughout this report, EV refers to 100% electric, zero-emission battery electric vehicles; it does not include hybrids.

When analyzed together, these perspectives provide a holistic view of both market readiness and consumer demand. This approach overlays real-world sentiment directly onto the hard infrastructure data across four continents to reveal deeper insights into market growth and the factors influencing adoption and satisfaction. Ultimately, the report identifies where infrastructure progress is improving the driver experience and where barriers remain. The full methodology, including market coverage and metrics, is in the appendix.

Key findings

With global EV sales expected to account for close to **30% of all cars sold in 2026 ↗**, infrastructure development is becoming more urgent. Charging networks, real-time information and reliability will determine whether sales growth translates into everyday driver confidence.

EV interest is rising but many consumers are not yet ready to choose one as their next car. Among surveyed owners of combustion vehicles, only 17% say an EV is the vehicle type they are most likely to purchase or lease next. This shows that growing interest has not yet translated into firm purchase intent.

The 2026 research findings highlight market conditions influencing whether drivers choose, rely on and stay with EVs:

Charging barriers are easing but remain the leading obstacle to EV adoption
Most surveyed EV owners (68%) say the charging experience is better than expected but access, reliability and confidence remain pain points. Charge point access is their top frustration and 54% say they have avoided a trip because they were worried about finding a charger.

"The next phase of EV adoption will be shaped by what drivers experience in real places and real journeys. Confidence depends on knowing where charging is available, whether it will work, how long it will take and how it fits into the trip. As EV adoption grows, location intelligence and real-time charging information will become essential to making electric mobility easier to plan around and easier to trust."

— Denise Doyle, Chief Product Officer, HERE Technologies

Confidence in local charging is improving, but unevenly
Half of respondents now rate local public charging coverage positively, up from 41% in 2025. The improvement is especially visible in the US, while the UK and India continue to show the strongest overall satisfaction despite smaller year-over-year (YoY) changes.

Cost is overtaking sustainability as an adoption driver, but consumers define value broadly
Among respondents, better value for money is now the top motivator for switching to an EV at 36%, followed closely by lower running costs at 34%. Environmental benefits, which held the top spot in 2025, now rank third at 33%, suggesting buyers are putting more weight on affordability and day-to-day practicality.

Hybrid alternatives are testing EV owner loyalty
A growing share of EV owners are open to hybrid alternatives, with 28% of EV owners saying they are most likely to consider a plug-in hybrid electric vehicle (PHEV), hybrid electric vehicle (HEV) or extended-range electric vehicle (EREV) as their next vehicle, up 5 percentage points from 2025.

Fuel prices make EVs more relevant
Seven in 10 respondents say fuel price increases have raised their interest in EVs, but for many, lower fuel prices would not necessarily reverse that interest.

Automaker origin affects trust and consideration
Japanese and European brands draw the strongest consideration from global respondents at 73% and 69%, while views of Chinese brands vary more by market. Lower prices and perceived value help Chinese brands gain traction in most markets but trust, quality and reputation remain barriers among neutral or resistant consumers.



Perception gap matrix

Infrastructure readiness and consumer commitment do not always move together. By comparing maturity data with survey responses, the matrix shows where charging networks, consumer enthusiasm and purchase intent are aligned and where gaps remain. That comparison helps explain why some markets may be closer to faster EV adoption than others.

Mature infrastructure

Adoption-ready alignment:

Germany and the UK — Stronger purchase or repurchase signals align with mature infrastructure, suggesting a more established base for EV adoption, although questions remain around power reliability and grid capacity.

Developing infrastructure

Demand ahead of infrastructure:

India and Australia — Interest and momentum are strong, but charging friction, coverage gaps or network strain show that infrastructure still needs to catch up.

Infrastructure ahead of demand:

US — Infrastructure improvements and stronger charging perceptions are evident but EV purchase intent remains cautious.

France — Comparatively mature infrastructure. Expanded policy support may spur growth, but cautious purchase intent remains.

Demand hesitancy:

Spain and Italy — Weaker EV purchase intent and hybrid interest or charging concerns suggest consumers may need stronger reassurance and infrastructure support before committing to a fully electric vehicle.

Consumer EV demand signals

Market placement is based on the combined reading of survey signals and maturity data. The matrix shows directional alignment or gaps between infrastructure readiness and consumer commitment; it is not a ranking.

What is shaping EV adoption now: deeper insights and findings

For many drivers, the decision to switch to an EV currently comes down to how easily the vehicle fits into regular life activities. Drivers with home charging, predictable daily travel and reliable local infrastructure face a different set of considerations than someone who depends on public charging, drives longer distances or has limited charging access.

The following seven chapters explore the themes that emerged from our analysis of the maturity data and survey. They show what is drawing drivers toward EVs, what is still holding them back and why adoption readiness varies by market.



2 Demand is rising, but conversion remains uneven

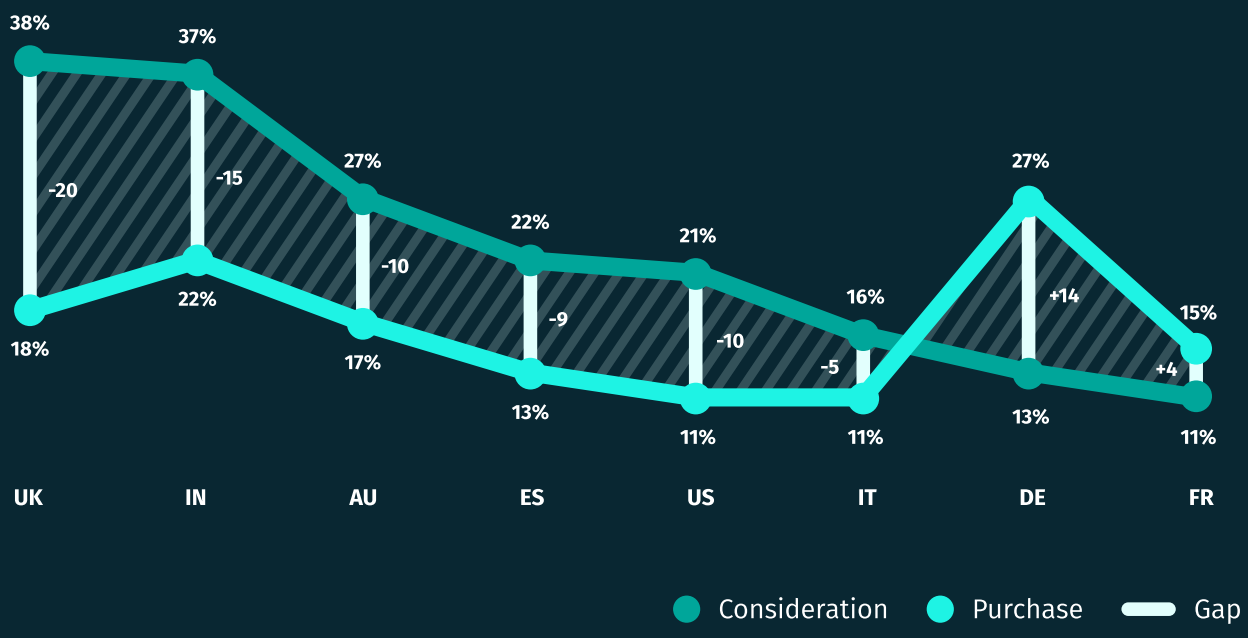
While EV consideration is expanding, it's not rising evenly across markets or converting automatically into purchase intent. Among all combustion vehicle owners surveyed, 27% say they are more likely to consider an EV than they were a year ago. The strongest increases appear in markets where consumer enthusiasm, fuel-price pressure or policy support make the switch easier to justify, but greater openness doesn't always mean an EV is close to becoming their next purchase: only 17% of that same group identify an EV as their most likely next vehicle. A closer comparison of the relationship between 'openness to consider' and 'next-vehicle intent' among owners of combustion vehicles reveals very different market patterns.

The graph below compares these two different signals from this year's respondents. The gap between the two indicates whether EV interest is building faster than commitment, or whether firm purchase intent is already stronger than recent gains in consideration.

In most markets, a greater number of combustion vehicle owners say they are much more likely to consider an EV as their next vehicle. The gap is widest in the UK and India, where interest is building faster than purchase intent. Australia, Spain and the US show a similar, though smaller, pattern, while Italy's two measures are very close.

EV signals: consideration vs. purchase

Combustion vehicle owners (%)





Germany stands out for its move in the opposite direction: the graph shows 27% of combustion vehicle owners identify an EV as their most likely next vehicle, while only 13% say they are much more likely to consider one than a year ago. France shows a narrower version of the same pattern.

These findings are directional signals, not a conversion rate. Germany's result may reflect purchase intent that has been building over time, with its new 2026 federal incentive program likely adding momentum. In France, policy support may also be reinforcing EV purchase intent, although the signal is more modest. Additional survey data shows that relatively few combustion vehicle owners are moving away from EV consideration. Across the markets surveyed, only 7% say they are less likely to consider one than they were a year ago.

Other signals also indicate resistance is softening. When drivers were asked again this year if they would choose an EV over a combustion vehicle if the price and features were the same, the most resistant markets (US, France and Spain) saw the biggest gains. Spain recorded the largest positive movement, up 12 percentage points, followed by the US at 8 percentage points and France at 3 percentage points. This reduced hesitation indicates greater opportunity for electrification growth, especially if EVs can offer the same ownership experience as a combustion vehicle at a similar cost.

Rising EV consideration is increasingly tied to everyday ownership needs, from fuel costs and range to charging speeds and costs, access to home or workplace charging and wider model choice.

Housing and parking conditions also play an important role in adoption. Drivers who live in high-rise buildings, multi-family housing or dense urban areas may not be able to rely on private home charging, even when they are interested in switching to an EV. For these consumers, charging experience depends on public, workplace or shared charging access, making local availability, reliability and accurate charger information especially important.

3 Network growth and the charging experience

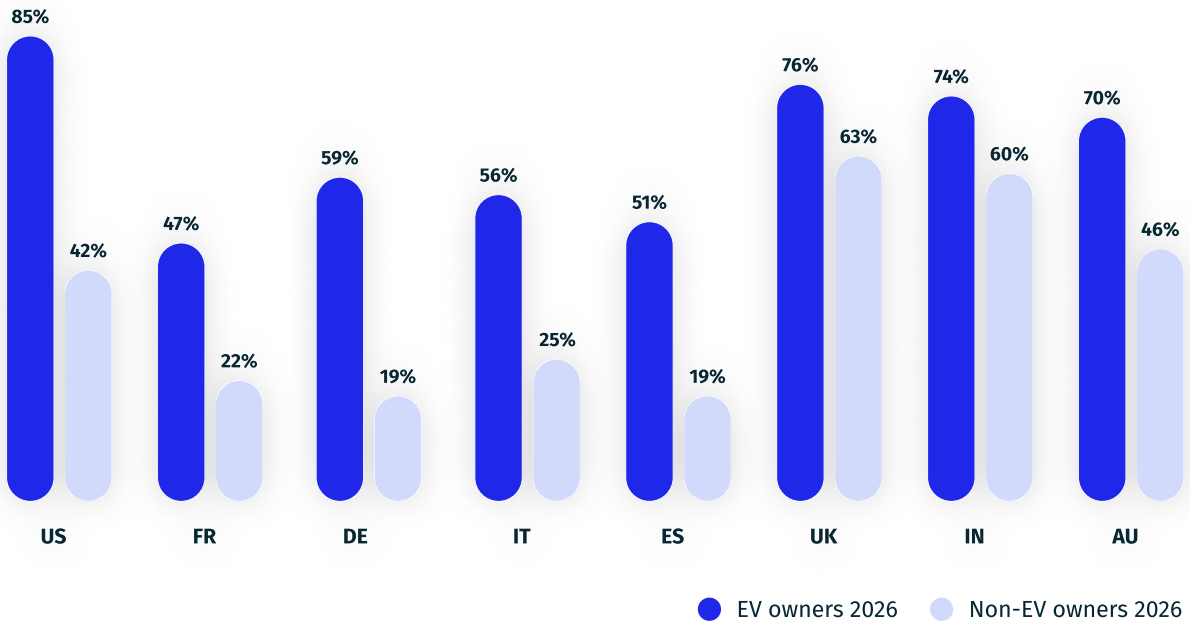
The main barriers to EV adoption are starting to ease, suggesting that consumers are becoming more comfortable choosing an EV. Limited availability of charging stations remains the top barrier, selected by 40% of surveyed respondents, but it fell by 7 percentage points from 2025. Driving range remains the second-largest barrier at 37%, down 6 percentage points from last year.

Public charging sentiment is improving overall. Globally, 50% of all surveyed drivers now rate local public charging coverage as good or very good, up from 41% in 2025, with the strongest satisfaction in the UK (70%) and India (62%). But views vary significantly both by market and EV ownership. Across every market, EV owners rate public charging coverage much more favorably than non-EV owners, as shown in the graph below. This suggests charger visibility is improving for the general public, but regular use of the network is what builds familiarity and trust.

France, Spain, Germany and Italy have lower overall positive perception ratings, making the EV/non-EV ownership gap especially important in markets where non-EV drivers may still be forming views from limited experience.

Charging confidence rises with EV experience

Survey results: drivers rating local public charging coverage as good or very good
EV owners vs. non-EV owners 2026 (%)

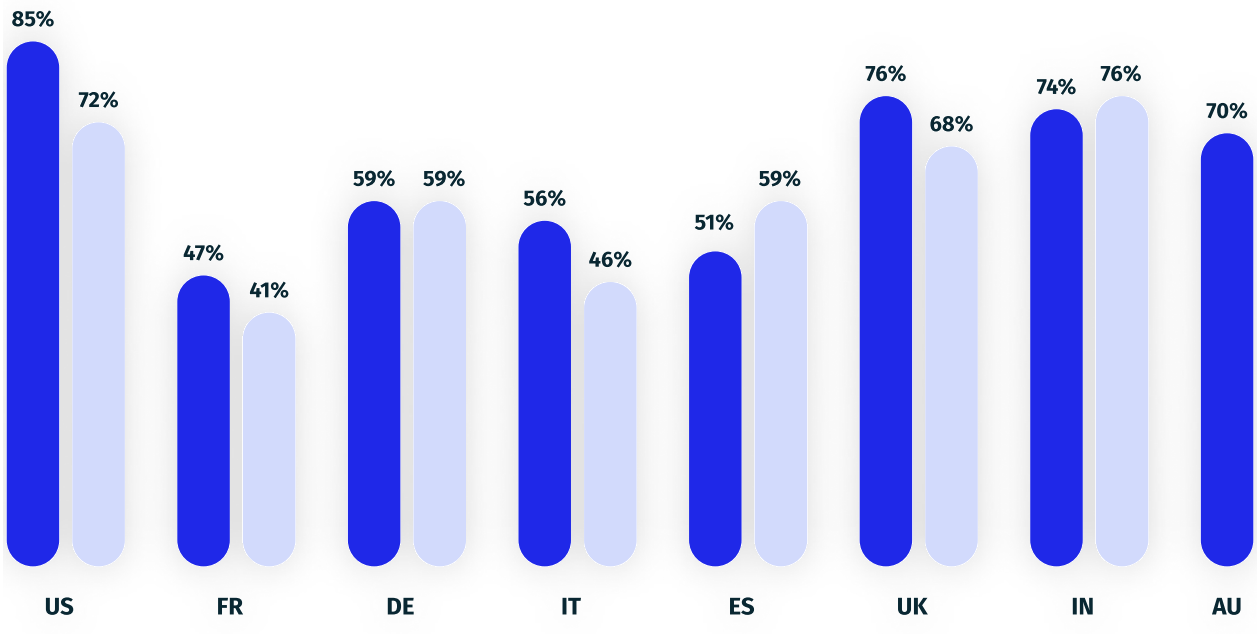


YoY survey results among EV owners are more mixed, even as public charging sentiment improves overall. The US posted the strongest EV-owner gain, with positive ratings of local public charging coverage jumping from 72% to 85% — marking the highest satisfaction level recorded in the study. Italy, the UK, and France also improved, Germany held steady, and Spain and India edged lower from relatively high starting points.

Broader US sentiment also improved, with positive ratings among all surveyed drivers rising 19 percentage points YOY, from 28% to 47%.

EV owner charging sentiment varies by market

Survey results: EV owners rating local public charging coverage as good or very good, 2025 vs. 2026



Australia added in 2026; 2025 data not available

EV owners 2026 EV owners 2025

Challenges emerge when charging networks cannot keep pace with the number of EVs on the road. That infrastructure strain can be felt in fast-growing markets, but it can also affect more mature markets if charger deployment, power capacity or reliability does not scale with adoption. Even as the overall market becomes more successful, drivers may still face gaps in charger availability, placement and dependability. To keep satisfaction high, charging networks need to improve not only in size, but also in reliability, speed, route coverage and real-time information.

Between 2025 and 2026, the number of US charge points grew by more than 14%. Average charger power in the US increased from 65kW to 83kW, a 28% rise, creating more capacity for EV drivers as new infrastructure was rolled out. The surge in positive US charging perception may reflect the accelerating network expansion, combined with faster chargers that make public charging feel more efficient and accessible.

The European EV landscape is seeing increased rollouts of high-speed charging networks. Between 2025 and 2026, Europe added 162,000 chargers, increasing its number of chargers by 14% and total charging power by 14.6GW, and lifting charger power from 44kW to 50kW. Norway and Denmark increased their EV fleet share by more than 6 percentage points, while Bulgaria was the only listed country to see its EV fleet share decrease. As EV fleets grow, the next challenge is to improve the balance of charger power, density and grid capacity.

Unlike Europe, where the focus is shifting to improving existing networks, India's challenge is building enough infrastructure to support growth. Looking specifically at the growth of the charging ecosystem aimed at supporting four-wheel vehicles, rather than low-voltage chargers for light vehicles (two- or three-wheelers), India's charge point additions for four-wheelers grew more than fourfold YoY. Just over 31,500 charge points were deployed in the 2025 to 2026 data period, as compared to 6,800 in the prior year. This added 1.65GW of power capacity and raised average charger power from 32kW to 45kW. India appears to be a fast-growth market where rapid infrastructure buildout, better data availability and uneven state-level development can shift state rankings quickly.

"The EV transition is now shaped as much by driver confidence as by vehicle and charging technology. EV markets gain momentum when charging infrastructure, vehicle adoption and the ownership experience develop in parallel. Looking at these factors together, as we do in the HERE-SBD EV Index 2026, helps explain where EV adoption is becoming more resilient and where gaps could stall or prolong the transition."

– Robert Fisher, Senior Consulting Manager, SBD Automotive

The survey also asked whether respondents believe their country can keep up with rising EV adoption by developing the necessary charging infrastructure. Confidence levels fall into three tiers. High confidence is led by India (87%) and the UK (79%). A moderate tier includes Australia (67%), Spain (62%) and the US (60%). Meanwhile, European nations show the most caution, forming the lowest tier with France (52%), Germany (52%), and Italy (49%). The results suggest that consumers may see progress in local charging availability, but national infrastructure readiness is still viewed unevenly across markets.

4 What would move the needle on EV uptake?

As EVs become more mainstream, the top factors behind the rise in their consideration are practical ones: fuel costs (42%), EV driving range and charging speed improvements (38%), access to home or work charging (31%), charging cost (31%) and a wider choice of EV models (30%). Cost and affordability factors take the lead, but convenience and choice are also part of the decision.
Better value for money is now the top motivator for buying or leasing an EV, selected by 36% of all respondents. Lower running costs follow at 34%, while environmental benefits rank third at 33%. Environmental benefits are still important, but they fell by 7 percentage points from 2025, further indicating that buyers are placing greater weight on value, affordability and everyday practicality.

Rising fuel prices are also making EVs more attractive, with 70% of all respondents saying fuel-price increases have raised their interest in EVs. But fuel costs are not the only demand driver. Even if fuel prices fell significantly, 39% of respondents say their EV interest would not change and 50% say they would still be more likely to consider an EV. Fuel prices help build the case for EVs, but adoption depends on more than pump prices alone.

What drives EV adoption varies from one market to another. Indian consumers prioritize environmental benefits, better performance and advanced in-car technology, each selected by more than 40% of respondents, while consumers in other markets choose fewer motivators. In the US, leading motivators cluster around 29% to 31%, while many European results sit closer to the mid-30% range. This suggests that Indian consumers respond to a wider range of EV benefits, while US and European consumers place greater weight on specific cost and ownership trade-offs.

Perceptions of total cost of ownership also vary widely by market. Overall, 45% of respondents believe EVs are cheaper to own than combustion vehicles, while 26% believe EVs are more expensive. India, the UK and Germany are the most positive with 59%, 53% and 51%, respectively, claiming EVs are cheaper to own. US respondents are least likely to believe EVs are cheaper to own at 34%, with nearly as many respondents saying costs are about the same (29%) or more expensive (28%). French respondents are most likely to see EVs as more expensive to own (46%), which may help explain weaker sentiment toward EVs than other European markets.

Government incentives work best when they address both cost and convenience. Respondents identify more public charging stations, lower electricity rates, support for home charger installation and free or discounted public charging as the most helpful measures. Purchase grants and tax incentives still carry a lot of importance and appeal, but consumers also want support that lowers the cost and complexity of charging.

5 Designing a better charging experience

High-speed charging availability tops the list for a second year as the most important charging feature among all respondents when traded off against other charging-related attributes. As charging networks grow, drivers expect more than coverage. They want fast, reliable, easy-to-find and easy-to-use chargers that fit their vehicle and their journey. Standardized charger connectors and plug-and-charge automatic payment rank second and third, highlighting the demand for simpler, more convenient charging experiences.

Drivers also have clear expectations about how long charging should take. They don't expect charging to be instant, but they do expect it to be predictable and worth their time. Nearly half of global respondents (46%) are willing to wait 20 minutes or more for a 10%–80% charge, while 28% want that charge completed in 15 minutes or less.

Range expectations are similar across France, Spain, Germany and Italy. On average, 27% of surveyed drivers expect a 10-minute fast charge to add up to 150km of driving range, while 39% expect 150–225km. In the US and UK, 42% and 50% of respondents, respectively, say less than 150 miles would be acceptable. These expectations broadly align with higher-power charging capabilities.

A mature EV market requires the right mix of chargers to meet driver needs, not just a high total count. Drivers need two distinct types of charging: slow, low-power AC charging for homes, offices or long stops where cars sit for hours, and high-power, DC fast charging for long distance travel, highway runs, quick top-ups or confidence on unfamiliar routes. Looking at charger count alone hides the gaps in the network. Success depends on having the right power levels in the right locations along the right routes.

The digital ecosystem supporting a charge point also has a significant impact on the driving experience. In the survey's trade-off exercise, respondents highly prioritized high-speed charging availability, automatic and integrated payment, live status updates, dynamic route planning, safety and nearby amenities — all features designed to reduce pre-trip uncertainty. With secure parking and nearby amenities ranking fourth and fifth, drivers appear to be seeing a charging stop as part of the journey, not just a place to plug in.

As EV uptake accelerates and the on-road fleet expands, charging must become seamless and predictable to plan around and depend upon. Drivers need accurate information on charger location, availability, status, speed and payment before they commit to a stop. The goal is for charging to become a routine part of the journey, not another task drivers have to manage.

6 Ownership experience will shape EV loyalty

Non-EV owners often focus on what might go wrong with owning an all-electric vehicle — charging access, range and cost. EV owners, by contrast, judge the vehicle through daily experience. For mainstream adoption to keep growing, first-time buyers need fewer reasons to hesitate, while current owners need a positive experience to make them buy one again.

Real-world EV ownership frequently exceeds initial expectations. Among surveyed owners, 68% say the charging experience was better than expected, while 67% say the same about driving range. This suggests that some pre-purchase concerns ease once drivers have direct experience with an all-electric vehicle.

This positive experience is reflected in strong EV loyalty. Globally, 76% of surveyed EV owners say they are likely to buy another EV as their next vehicle, with intent slightly higher in the US and Europe at 77%. That stability is notable because the US often trails other markets on broader EV adoption measures, yet current owners remain highly likely to stay with the technology. Still, an improved ownership experience is not the same as a friction-free one. The YoY data shows some challenges persist. Finding a charger and range anxiety now tie as the top owner frustrations, each cited by 14% of surveyed owners. In 2025, finding a charger was also the top frustration at 14%.

Faulty chargers add another layer of friction. One in five EV owners say they have encountered a broken public charger once, leaving them unable to charge, and 39% report this happening occasionally or more often. These moments weaken trust even when overall ownership satisfaction is high.

These recurring pain points become more important as EVs become the main household vehicle. Among surveyed EV owners, 65% replaced their only car to become EV-only households, while 28% added an EV alongside a combustion vehicle. For drivers relying solely on an EV, day-to-day charging concerns, such as charger reliability and longer-trip confidence, are more critical than for households that still have a gasoline or diesel backup.

Hybrids may appeal to drivers who like the benefits of electrification but still want flexibility for longer trips or situations where charging availability is less predictable. That flexibility helps explain growing interest in plug-in hybrid electric vehicles (PHEVs), hybrid electric vehicles (HEVs) and extended-range electric vehicles (EREVs).

Hybrid consideration among EV owners has risen from 23% to 28% YoY, suggesting that satisfaction with pure electric ownership does not automatically guarantee another EV purchase. Hybrid interest is especially high among EV owners in Italy and Spain, where the maturity data shows weaker charging power. EV repurchase intent is strongest among surveyed EV owners in the UK at 87% and Germany at 78% and weakest in Italy at 48%.

In short, EV satisfaction remains very positive, but repeat loyalty depends on whether drivers trust that the vehicle and charging ecosystem can support their expanding expectations for everyday use, longer journeys and reliable charging.

7 Regional adoption signals

EV adoption is growing across markets but the signals look different in each region. Infrastructure conditions, driving habits, fuel prices, policy support and brand perceptions can all affect how comfortable drivers feel about switching to an EV. The regional data is useful to understand where progress is already changing consumer perceptions and what concerns still hold buyers back.

United States: charging perceptions improve, purchase intent lags

In the US, perceptions of public charging have improved faster than in any other surveyed market. Positive ratings of local charger availability among US EV owners rose 13 percentage points YoY, from 72% to 85%, while ratings across all US respondents increased 19 points, from 28% to 47%. The 85% satisfaction level among surveyed US EV owners is the highest recorded globally, suggesting that direct experience helps drive satisfaction.

However, this positive sentiment remains concentrated among existing EV drivers and isn't reaching prospective buyers in the same way. Only 42% of US combustion vehicle owners rate local charger availability positively, creating a 43-point gap with current EV owners. This gap helps explain why stronger charging perceptions have not yet translated into stronger purchase intent: only 11% of surveyed US combustion vehicle owners say an EV is their most likely next vehicle.

The maturity data shows that infrastructure progress is reshaping market conditions, even when customer commitment is still catching up. And at state level, that progress can vary quickly.

The top-ranked US states remained the same as last year, with Delaware, Washington, D.C., and New Jersey holding the top three positions. However, the gap between the highest- and lowest-performing markets narrowed significantly from just under 7 percentage points to 1.5 percentage points, showing other states are starting to catch up. Alaska recorded the biggest improvement, rising from the lowest rank of 51, up to position 26, supported by a jump in charger availability and the highest average charging power in the country at nearly 140kW. Oklahoma and Utah saw the next-highest increases at 18 and 17 points, respectively, earning Utah a rank of 15 and Oklahoma a rank of 19 among all US states.

The states with rising rankings show that targeted infrastructure investments, particularly in charger deployment and charging power upgrades, can influence market maturity faster than growth in EV fleet share alone.

In 2026, California continues to have the largest EV fleet share at just over 6%, followed by Washington, D.C., at approximately 4.5% and Delaware at just under 4%. Survey data also shows that 24% of California respondents are most likely to consider an EV for their next vehicle, compared with 16% for the US overall.

In the US, the end to purchase incentives in late 2025 contributed to dampened EV sales into 2026. Charging policy also remains difficult to assess. The National Electric Vehicle Infrastructure Formula Program (NEVI) was designed to build a baseline highway charging network, but delays and policy changes have made progress harder to track. As of Q4 2024, 126 public chargers were operating across 31 NEVI-funded stations in nine states. With no centralized reporting office, it is now harder to measure how quickly planned sites are moving from funding to operation. Even so, earlier infrastructure buildouts and higher average charger power may be starting to improve how drivers experience public charging.

Europe: mature infrastructure, uneven consumer demand

Europe shows that EV maturity is becoming less about infrastructure expansion and more about balance. Norway and the Netherlands are tied as the European markets with the greatest infrastructure maturity, with Belgium now joining the top three. However, even leading markets show gaps. Norway remains second-to-last in chargers per EV due to its exceptionally high EV market share at 89%, while the Netherlands scores poorly on average charger power because much of its network was built before today's high-power DC fast chargers were widely available. Meanwhile, emerging markets are closing the gap. Romania and Estonia recorded the strongest score improvements.

European Union policy and regulations continue to push EV adoption and charging investment across Europe, but the maturity data shows that policy momentum needs to develop into balanced, usable infrastructure across countries. Stricter EU CO2 standards and more targeted programs, including France's social leasing initiative for lower-income workers, have helped lower upfront cost barriers. Germany's new €3 billion federal EV incentive program launched in January 2026 is also renewing EV interest after the sharp slowdown that followed abrupt subsidy cancellations at the end of 2023.

Even with this support, EV market share still varies widely across Europe, ranging from less than 3% to 89%. The EU's new Electrification Action Plan seeks to accelerate adoption across the Union, through measures including streamlined grid connections, lower electricity prices and expanded social leasing programs for lower-income households. While these initiatives directly address concerns around cost and charging accessibility, driving range anxiety remains one of the most frequently cited barriers across European markets.

The maturity data also shows a strong correlation between national wealth and EV adoption, with higher-income countries tending to have larger EV fleets and more developed charging infrastructure. However, wealth alone does not determine EV maturity. Ireland and Finland illustrate this well. Despite their relatively high incomes, both countries perform differently from what economic factors would predict. Factors such as geography, population density and local travel patterns can influence how quickly charging networks develop and how readily consumers adopt EVs.

Driver demand also varies across Europe. While the region's infrastructure continues to mature, consumer sentiment and purchase intentions show country-level differences. Among surveyed non-EV owners, Germany shows the strongest next-vehicle EV intent at 27%, followed by the UK at 18% and France at 15%. In Italy and Spain, non-EV respondents lean more strongly toward hybrids over EVs. Italy's EV owners also record the weakest repurchase intent among current EV owners.

Together, these differences show that market maturity is not only about charger counts or adoption rates. The strongest markets balance charging availability, charging performance, policy support and consumer demand, while emerging markets can move quickly when investment is applied to the right gaps.

India: high interest, rapid buildout and charging friction

India shows strong consumer interest in EVs but infrastructure across the country is developing at different speeds and with different levels of government support. Many EV owners report challenges with charging availability and charger reliability, even as enthusiasm remains high. The transition to electric passenger cars has had a slower start than the two- and three-wheeler market, where cost sensitivity and urban mobility needs have already helped drive adoption.

Unlike Europe's more mature passenger car-led EV market, India's growth path is still developing and early adopters may be more willing to tolerate charging friction. For example, 83% of surveyed EV owners in India say they have avoided a trip because of charging availability concerns, but 80% say the EV charging experience is better than expected.

That uneven experience is also shaped by how India's EV policies are structured, with responsibility divided between national and state governments. The national government has focused its support on domestic manufacturing and public transport electrification, while state governments play a larger role in encouraging private EV adoption.

India's national government is using significant production-linked incentives and relaxed customs duties to boost imports and domestic production of affordable EVs, while purchase subsidies for private electric passenger cars are left to the states. Individual states have taken diverse approaches to building their local EV ecosystems, but these subsidies often include road tax exemptions, registration fee waivers and cash incentives designed to reduce ownership costs. As a result, EV ownership is easier to justify in states and territories that combine stronger local incentives with charger investment.

EV adoption in India varies significantly by region and vehicle type. But despite that fragmentation, the maturity data shows India's charging infrastructure is scaling quickly. India added 31,500 charge points this year, a 56% increase, including 25,000 DC fast chargers — now the fastest-growing charger type. Infrastructure is extending beyond urban clusters toward national expressways, though grid capacity and installation timelines remain key constraints as its electric fleet grows.

Rankings at the state and territory level also shifted as infrastructure improved. Telangana, Andhra Pradesh and Chandigarh now rank as the leading regions, with Telangana benefiting from stronger charging performance, broader road network coverage and greater EV fleet penetration, as evidenced by newly available government data. The shifts show how quickly India's regional picture can change when infrastructure deployment and data visibility improve.





Australia: rising interest, policy support and infrastructure strain

Australia's EV sales have surged in 2026, driven by fuel-price pressure, tax incentives and more competitively priced Chinese models. More than two-thirds of Australian drivers surveyed (67%) say they are more likely to consider an EV than they were a year ago, citing rising fuel prices (42%), improvements in EV range and charging speed (33%) and access to home or workplace charging (30%) as key influences. The maturity data shows where Australia's EV momentum is strongest. New South Wales (NSW) and the Australian Capital Territory (ACT) rank first and second in the index, but they reflect different funding and deployment models.

NSW is scaling infrastructure across a larger population and geography, with 78,000 registered EVs, 4,450 public chargers as of October 2025, and an AU$16.1 million commitment to install 246 high-speed chargers. The ACT, by contrast, is using a more concentrated model, combining charger investment with reduced EV and hybrid registration taxes and low-interest loans for home chargers purchased by owners of zero-emission vehicles.

Nationally, Australia's charging network has a distinctive, relatively even split between AC and DC infrastructure, with 5,899 AC chargers and 5,082 DC chargers. That mix reflects a later-developing EV market, in which DC fast charging has been prioritized for long-distance journeys. Wider adoption will require more street-level and destination AC charging for drivers without private charging access.

Australia's geography makes charging balance harder to achieve. Public charging is heavily concentrated around major urban and coastal corridors, with sparse coverage across many regional routes.

Australian EV owners surveyed report a positive charging experience, with 70% rating public charging favorably and 76% saying charging has exceeded expectations. Even so, friction still occurs: 36% say they have avoided a trip because of charging concerns at least sometimes and 13% say this has happened once.

Cost perceptions also support Australia's EV momentum. Among all Australian drivers surveyed, 45% believe EVs are cheaper to own than combustion vehicles, almost twice the share who believe EV ownership is more expensive (24%).

The takeaway for policymakers is that affordable EVs encourage more people to switch, but sustained public and private charging investment is essential to keep pace with demand and help convert Australia's early momentum into durable EV adoption.

8 The role of brand trust in EV adoption

As more automakers compete in the EV market, brand origin remains an important factor in consumer consideration. Japanese and European brands have the broadest appeal, with 73% and 69% of respondents saying they would consider buying from them. South Korean and US automakers are not far behind, at 63% each. Chinese and Indian automakers are lower, at 45% and 42%. This suggests consumers are open to a wider range of EV brands, but trust still varies significantly by brand origin.

Views of Chinese automakers are mixed, but the data shows many markets are receptive to considering Chinese brands. Around half of respondents in Australia, the UK, Italy, India and Spain say they are open to Chinese EV brands, while only 22% to 25% say they are not. In these more open markets, value and cost appear to play a strong role.

Resistance is highest in France, the US and Germany, where 57%, 44% and 43% of respondents say they wouldn't consider a Chinese brand. Open-ended responses suggest the divide is largely about value versus trust: drivers who are open to Chinese brands often mention price and value. Those who are less open tend to mention trust, quality and reputation. This matters as Chinese automakers expand globally and bring lower-cost EV models into more price-sensitive markets. **According to the International Energy Agency↗** (IEA), China now accounts for most global EV sales and for nearly 75% of electric cars produced in 2025, making consumer openness to Chinese brands an increasingly important factor in the global EV adoption story.

Australia's EV adoption illustrates how market context can affect Chinese EV brands' traction with cost-conscious buyers. Without a domestic automaker shaping national brand preference in the same way as the US, Germany or France, Australian consumers may be more open to Chinese EVs, especially when lower-cost models make switching from a combustion vehicle to an EV easier. Download the full dataset on here.com.

Looking ahead: what does the next phase of EV adoption look like?

The next phase of electrification will move beyond adoption momentum. It will be defined by how well EVs scale to everyday use and integrate with connected-vehicle technology and the wider energy ecosystem. As the market matures, system reliability, grid stability and seamless consumer integration will become increasingly important.

Responses to the consumer survey about the phase-out of gasoline- and diesel-fueled vehicles provide another way to understand market readiness. Respondents who support ending the production of combustion vehicles in the next 10 to 15 years often mention environmental concerns, trust in technological progress and a belief that the market can successfully make the change. Drivers who feel the timeline is too soon tend to point to affordability, continued dependence on combustion vehicles and doubts about whether infrastructure, vehicle choice and charging access are ready. Consumers need evidence that the transition will be affordable, reliable and manageable in daily life. For many drivers, the deciding proof will come through ownership. Beyond ease of use and dependability across charging, consumer acceptance will depend on payment simplicity, charging speed, route planning and real-time charger information. These are the details that determine whether drivers feel comfortable relying on EVs beyond familiar routines.

No single part of the EV ecosystem can do this alone. Governments and utilities must support infrastructure and grid readiness. Automakers must make EVs easier to choose and understand. Charge point operators must improve reliability and payment experiences. Technology providers can help make infrastructure more visible, navigable and useful. As more drivers switch to EVs, accurate charger discovery, route planning, availability and status information will become just as important as the charging network itself.

Making charging information actionable

HERE's location-based EV solutions, including HERE EV Charge Points, EV Routing and EV Charge Point Predictions, help make charging easier to plan around. Built directly into HERE Navigation, the solutions pair driver preferences with vehicle data to identify charging options that fit the route, vehicle and journey needs. By combining charger location, availability, vehicle range and predicted energy use, these capabilities can support more predictable charging decisions before and during a trip.

AI-powered prediction models can help improve route planning and charging confidence by anticipating energy consumption, charger availability and optimal charging stops throughout a journey.

> **"The modern vehicle is the product of more than 140 years of innovation and continuous improvement. As a result, internal combustion vehicles have become the default expectation for personal mobility. For many drivers, changing this preference will require more than a seamless transition. It will require an experience that surpasses what they can achieve with an internal combustion vehicle."**
>
> — Robert Fisher, Senior Consulting Manager, SBD Automotive

As EVs move further into the mainstream, the strongest players will be those that make electric mobility easier to choose, use and trust. The automotive manufacturing and supply chain landscape will be shaped by how well the industry responds to consumer expectations and government policies and priorities worldwide. Automakers that deliver exceptional customer experiences, compelling vehicle designs and strong value for money will be best positioned to succeed in the electric mobility future.

Appendix: methodology and markets

The maturity data measures and compares momentum in EV adoption and infrastructure development across global markets. It uses HERE proprietary EV charge point data and global government data sources to assess the relationship between EV uptake and charging infrastructure readiness. Throughout this report, EV refers to 100% electric, zero-emission battery electric vehicles; it does not include hybrids.

The maturity data is used to calculate the core metrics. These metrics are designed from the consumer's perspective to evaluate regional performance factors that directly affect driver experience. They are used to assess:

- → **How far drivers must travel to find a charger:** measured by the number of public EV chargers per road length.
- → **How quickly drivers can charge:** measured by the average power capacity of public EV chargers.
- → **How many EVs are on the road compared with internal combustion engine vehicles:** measured by the share of EVs in the total vehicle fleet.
- → **How likely drivers are to find an unoccupied charger:** measured by the ratio of public chargers to EVs on the road

How the index is calculated

Charger availability = 25 points
Charger power = 25 points
EV fleet share = 25 points
Chargers per EV = 25 points

Maximum score: 100 points

Each market is scored using a 100-point scale, with the four core metrics contributing up to 25 points each. The overall score determines the ranking, but the individual metrics are just as important because they show where a market is performing well and where it still needs to improve.

Analyzing the maturity data alongside survey responses related to charging experiences shows that markets with stronger scores tend to have fewer drivers avoiding trips due to charging concerns. This indicates that the index reflects real-world ownership conditions.

The balance score shows whether the four core metrics that shape the EV driver experience are developing in sync: charger availability, charger power, EV fleet share and chargers per EV. It is based on the degree of deviation across those metrics, so lower scores indicate stronger balance. The score measures alignment rather than absolute maturity: a market can perform well overall but still show imbalance if one metric is much stronger or weaker than the others, creating challenges as adoption rises.

A less mature market can have a strong balance score if its metrics are developing at a similar pace, signaling a more coherent foundation for phased growth once investment and adoption accelerate. Conversely, a more mature market may show weaker balance if one part of the ecosystem lags behind. The score helps show which parts of the ecosystem need to catch up to enable sustained growth.

The maturity data includes 50 US states and Washington, D.C., 30 countries in Europe, 34 Indian states and union territories and eight states and territories in Australia. In the US, updated charge point information was made available following the publication of the HERE-SBD EV Index 2025. The 2025 figures have been revised accordingly and any 2026 YoY comparisons reflect the updated information.

The 30 European countries covered are Norway, Luxembourg, Denmark, the Netherlands, Belgium, Germany, Austria, Sweden, Lithuania, Bulgaria, Latvia, Finland, Slovakia, Switzerland, France, Estonia, Croatia, Italy, the Czech Republic, Portugal, the United Kingdom, Romania, Greece, Spain, Slovenia, the Republic of Ireland, Poland, Hungary, Cyprus and Malta.

The 34 Indian states and union territories covered are Andaman and Nicobar Islands, Andhra Pradesh, Arunachal Pradesh, Assam, Bihar, Chandigarh, Chhattisgarh, Dadra and Nagar Haveli and Daman and Diu, Delhi, Goa, Gujarat, Haryana, Himachal Pradesh, Jammu and Kashmir, Jharkhand, Karnataka, Kerala, Ladakh, Madhya Pradesh, Maharashtra, Manipur, Meghalaya, Nagaland, Odisha, Puducherry, Punjab, Rajasthan, Sikkim, Tamil Nadu, Telangana, Tripura, Uttar Pradesh, Uttarakhand and West Bengal.

The eight Australian states and territories covered are New South Wales, Victoria, Queensland, Western Australia, South Australia, Tasmania, the Australian Capital Territory and the Northern Territory.

Building on last year's research, the survey continues to add a perception layer by capturing driver attitudes, motivations, barriers and charging experiences. The 2025 survey covered the US, India, five European markets: France, Germany, Spain, Italy and the UK. Australia was added in 2026, bringing the survey sample to 4,058 respondents across the US, France, Germany, Italy, Spain, the UK, India and Australia, including 850 EV owners and 3,208 non-EV owners.

Respondents were required to have purchased a vehicle from 2017 onward and to be the primary driver and decision-maker for their next vehicle purchase. The survey includes both EV owners and non-EV owners to compare ownership experiences, purchase intentions and charging perceptions across different stages of adoption.

Find out how location technology can help increase your confidence in the EV transition and build better EV infrastructure solutions

Explore the data behind the HERE-SBD 2026 EV Index

Download now

HERE-SBD 2026 EV Index glossary

Learn how we measure and compare momentum in EV adoption and infrastructure development across the world

Learn more

Optimize EV routing and charging

Prevent charge and range anxiety, improve battery consumption and increase range estimation

Find out more

About HERE Technologies
HERE is the global leader in mapping and location technology. For over 40 years, we've been powering innovation for the world's most recognizable companies: from launching our first digital map in 1985, to shaping the future of software-defined vehicles today. With the industry's freshest and richest unified map and a portfolio of products, services and solutions that serve the needs of multiple industries, HERE reveals opportunities that drive progress and unlock new possibilities for every moving vehicle.

Discover more at **here.com**.

About SBD Automotive
For nearly three decades, SBD Automotive has combined deep automotive expertise, research and consulting to deliver insights that enable better decisions — helping clients grow appeal, optimize cost and risk, and create lifetime value for safer, more secure, sustainable and seamless mobility outcomes worldwide.

For more information, visit **sbdautomotive.com**.

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