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EV Drivers & Enthusiasts On: EV Public Charging Network Reliability

New data and perspectives from My Driving Power®

February 2026

A first-of-its-kind opportunity

Your always-on gateway to the minds of EV enthusiasts

Leveraging Escalent's long-standing relationship with automotive original equipment manufacturers (OEMs) and the vast experience of C Space in managing communities, we've created an always-on qualitative research community of highly engaged electric vehicle (EV) drivers who are deeply invested in electric mobility, offering clients a flexible and cost-effective alternative to building and managing a proprietary community.

This shared community enables clients to build trusted, in-depth connections with EV enthusiasts, uncovering their real challenges and needs. With the ability to target specific consumers (for example, by geography or vehicle segment), 24/7 access, and a range of in-community research approaches, clients can move faster and reduce the cost and complexity of one-off research projects.

With a mix of Escalent-led and client-specific inquiries, the My Driving Power shared community delivers a continuous flow of unique insights not available anywhere else.

> "This community is always on, giving clients the ability to engage with EV enthusiasts who talk about their vehicles 50% more than the average person on demand—whether connecting with the community episodically for fast feedback or for longer-term, strategic projects."

K.C. BOYCE
Vice President
Automotive & Mobility

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My Driving Power

Whether you need quick feedback on a specific idea or deeper exploration to guide longer-term strategy, My Driving Power is designed to support fast, flexible learning.

The community offers multiple ways to conduct innovative research, with access to a curated collection of research tools without the need to manage and pay for endless vendors, licenses or platforms. In-community methodologies include surveys (quick polls, journal diaries, simple/complex surveys), facilitated discussions and organic conversations, and analytics (community stats, cross-tabs, text analytics).

C Space is a customer agency delivering customer-inspired growth.

C Space is the pioneer of communities and has spent the last 25 years perfecting them. The real value of a C Space community is its approach to building relationships. We create communities with the intention to understand and know people. We show them we're curious. We interact with them and never stop asking questions. We capture feedback, emotions and stories that inspire deep insights to inform strategic and business decisions at speed and over time.

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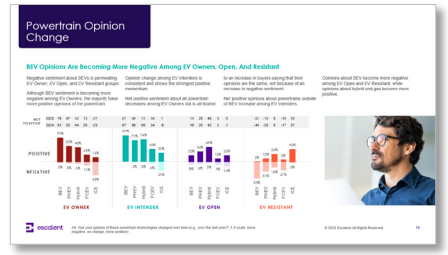
EVForward® is the largest study of EV buyers and electrified powertrain adoption.

EVForward is Escalent's research program focused on understanding electric vehicle buyers and electrified powertrain adoption.

Built on deep expertise across automotive, energy and technology, EVForward uncovers how EV buyers think, feel and make decisions. We study emerging attitudes, behaviors and expectations before they reach the mainstream, revealing insight that doesn't exist anywhere else in the market. The result is a clearer understanding of who current and future EV buyers are—so brands can create solutions for the people who will actually shape EV adoption.



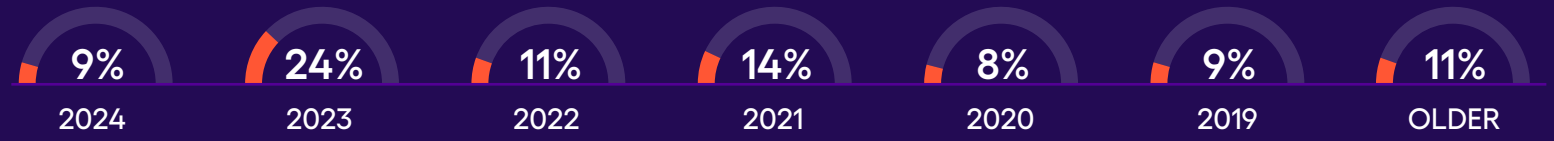
My Driving Power community composition

Community overview

354 Members have been recruited through nationwide battery electric vehicle (BEV) clubs/organizations and consumer panels.

BRANDS

MODEL YEAR



SURVEY METHODOLOGY

Topic:
EV Public Charging Network Reliability

Fielded:
September 22 – October 2, 2025

Method:
10-minute online survey

Completes:
n=209

MY DRIVING POWER QUALIFICATIONS

- US market only
- Must not work in market research, in automotive or for an electric utility company
- Must have one BEV in household
- Must have had an active role in the purchase/lease decision

Contents

Most EV owners charge at home and use public charging only occasionally:

43% use public chargers only once or twice in a six-month period

23% use public charging about once a month

Although a majority of users are satisfied with public charging reliability, user tolerance for public charging failures is near zero. Even minor issues can quickly erode confidence and push drivers to change public charging behaviors or brands.

As a result, every public charging session has become a rare, high-stakes moment that can make or break brand impressions of and customer satisfaction with public charging operators.

Fortunately, 66% of EV drivers report rarely or never having a problem while using a public charger, creating a strong foundation of customer satisfaction with public charging.

Nonetheless, 24% of users "sometimes" encounter problems with public chargers, highlighting systemic public charging reliability gaps.

Drivers most frequently use Tesla Superchargers, which is quietly raising user expectations and setting the bar for what good public charging experiences look like.

What rebuilds trust with EV drivers isn't monetary compensation—it's public charging network transparency and responsiveness, from real-time outage alerts to live customer support.

This is critical for public charging operators to address because public charging reliability has become a defining factor in shaping driver confidence and in advocacy of EV ownership:

58% of EV drivers say public charging reliability impacts their own intent to repurchase an EV

57% of EV drivers say public charging reliability strongly influences their willingness to recommend EVs to others

For Charge Networks

Public charging operators have the opportunity to ensure public charging is a premium reliability experience for users—it should be consistent, responsive and unmistakably branded for dependability.

By streamlining feedback loops, such as with quick response "QR" codes or app-based reporting directly at the charger, operators can transform user input into fast fixes while helping close the gap between the perception and reality of public charging reliability.

Networks can strengthen their credibility and build trust that keeps drivers coming back by doing the following:

1. Openly publishing charger uptime metrics
2. Offering predictive outage alerts
3. Communicating charger reliability in real time

For OEMs

There's a powerful opportunity for OEMs to co-own the charging reliability narrative by partnering with trusted public charging networks and directly weaving reliable public charging into the EV ownership promise.

By positioning dependable public charging—such as preferential access to highly reliable networks—as a core benefit, OEMs can significantly elevate post-sale satisfaction.

Furthermore, by highlighting verified public charging performance data and credible third-party reliability scores, OEMs can help shift the broader public EV charging story from one of uncertainty to one of proven dependability.

1 Public Charging Usage, Performance and User Feedback

Most EV drivers use public charging infrequently, signaling dependence on home or workplace charging

Low public charging usage means reduced tolerance for failure

Home charging is the main way EV drivers charge their vehicle:

43%
Use public chargers only once or twice in a six-month period

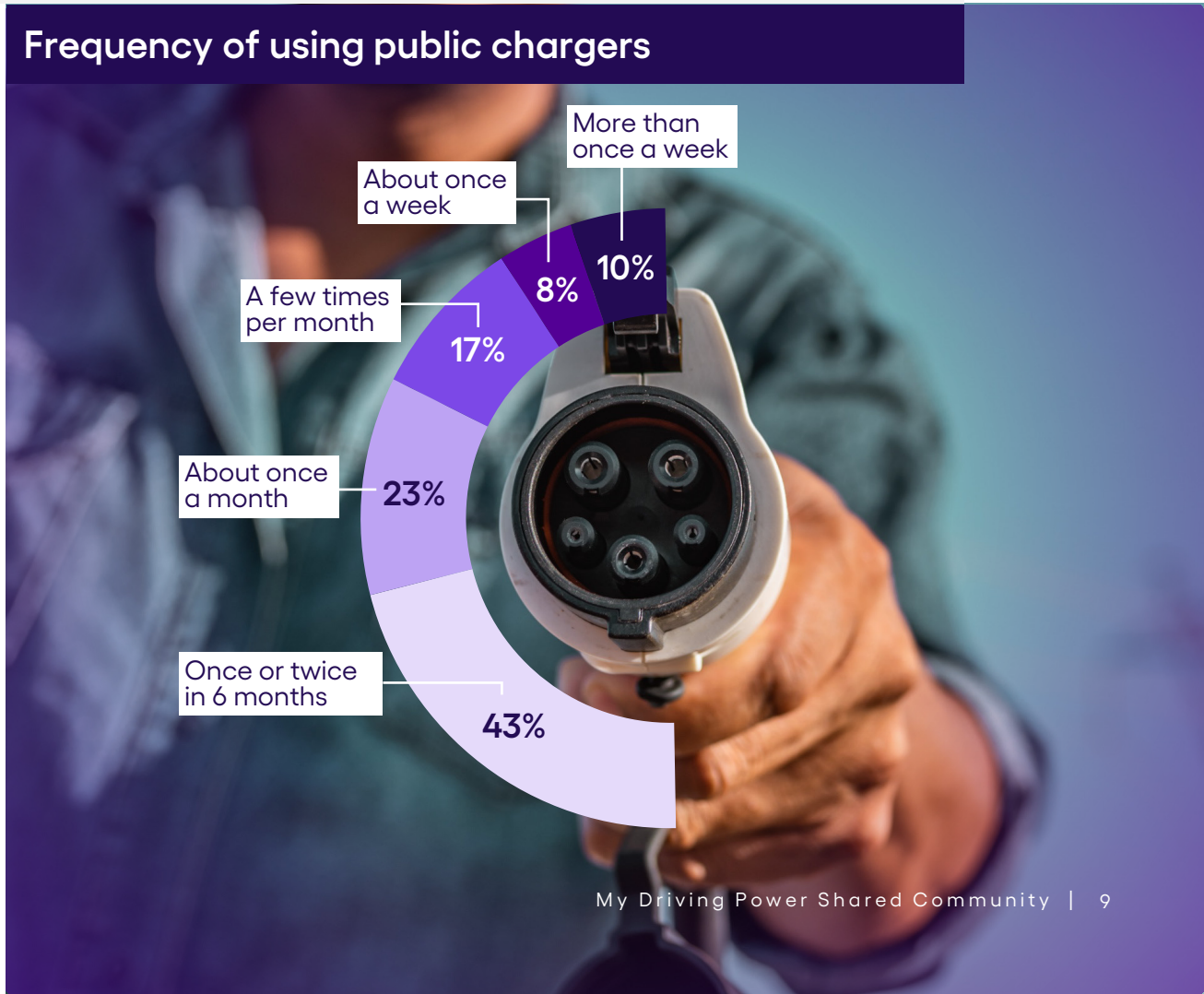
23%
use public charging about once a month

About one in five (18%) uses public charging once per week or more, possibly long-distance EV drivers or those without access to home charging.

This overall limited exposure to and use of public charging means that each public charging experience carries a disproportionate weight in shaping a user's brand perception—one single poor interaction can overshadow months of positive use.

This emphasizes the importance of public chargers always being in good working order so that when an EV driver uses a public charger, it delivers a positive customer experience.

Frequency of using public chargers



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S1. How often have you used public charging networks in the past 6 months?

Public charging reliability is relatively strong

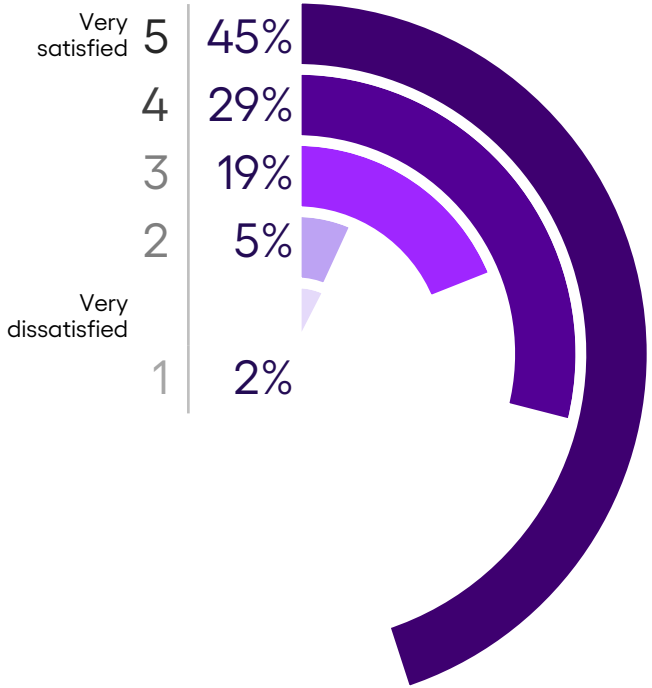
Consistency in public charge network performance decides long-term confidence

Nearly three-quarters (74%) of public charging users rate their satisfaction with charger reliability at a 4 or 5 on a 5-point scale wherein 1 is very dissatisfied and 5 is very satisfied—indicating a majority of positive experiences.

Only 7% of users express dissatisfaction with ratings of a 1 or 2, showing that negative experiences, while vocal, are a minority.

EV driver

Satisfaction with reliability of public chargers



Q1. How satisfied are you with the reliability of public charging stations you have used in the past 6 months?

About one-third of users encountered public charger problems, highlighting systemic reliability gaps

Public charging issues persist and, although less frequent, have potential to erode customer confidence if and when problems occur

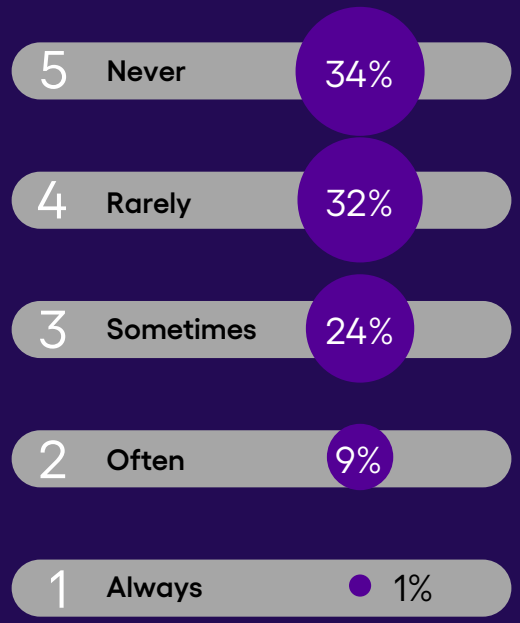
A majority (66%) of EV drivers have no problems or low-friction experiences with public charging:

34% reported never having problems with public chargers

32% rarely encountered issues

However, 24% faced problems “sometimes” and 9% encountered problems "often," highlighting that one in three users regularly meets operational friction with public charging.

Frequency of problems EV drivers faced at public chargers in the last 6 months



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Q2. In the past 6 months, how often did you experience a problem (like charger broken/offline, failed to start, payment failed, charge was much slower than expected) when using a public charger?

Hardware uptime and charging speed variability remain the largest public charger reliability pain points

Users faced public charging issues that were more operational than structural

Common public charging problems include:

49% Offline or broken chargers

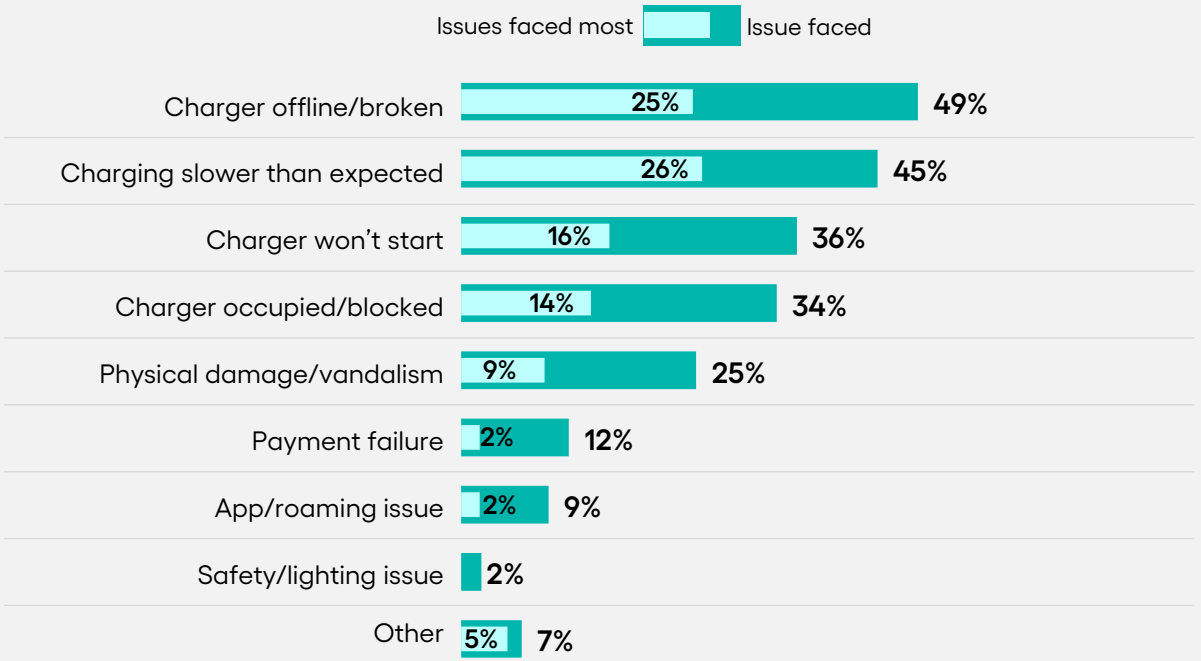
45% Slower than expected charging

36% Charger connection errors

Additionally, 26% of EV drivers cite charging speed (often linked to load management or poor site power) as the most frequent problem faced, closely followed by offline or broken chargers (25%).

Payment failure (12%) and app issues (9%) remain secondary challenges but persist as irritants.

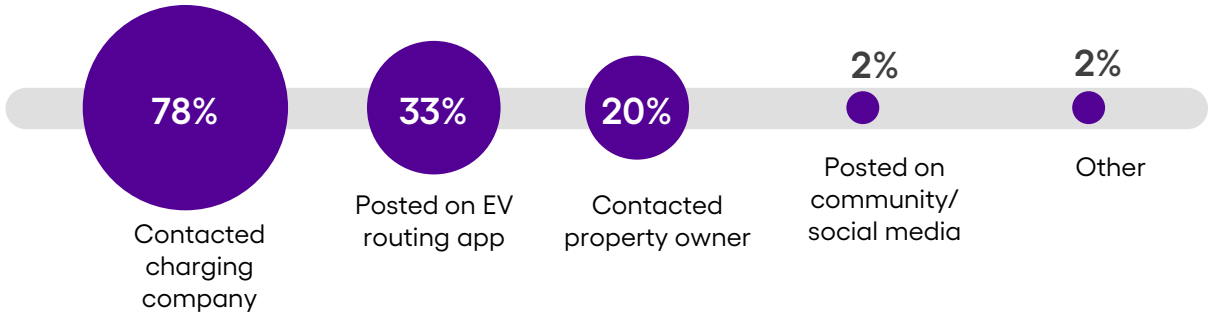
Types of issues faced at public chargers



Q3a. Which of the following problems have you personally experienced at public chargers in the past 6 months?
Q3b. Which ONE of these problems impacted you the most in the last 6 months?

Low user feedback on problems limits opportunity for operators to improve the public charging experience

How EV drivers reported a problem with public charger



Engaging customers proactively at the point of failure presents a potential pathway to restore customer confidence in public chargers

Only one-third (33%) of public charging users reported issues with public chargers while the remaining majority did not. This highlights an opportunity for charge point operators to provide users with easy and convenient ways to report issues.

When users do report an issue, network operators (78%) are the primary contact, reinforcing the importance of direct, responsive customer support.

Only one-third (33%) of users shared feedback through public apps such as EV routing apps, indicating brand-managed communication channels remain the main trusted interface for users to report public charging problems.

However, because a majority of users did not report problems with a public charger, this means public charging networks are receiving minimal structured feedback on how to refine and improve the public charging experience for their customers.

Q3c. Did you report any of the problem(s) you experienced using a public charger?
Q3d. How did you report the issue(s) you experienced?

2 Public Charging Failure Tolerance, Trust-Restoring Actions & Desired Improvements

Consumer tolerance of public charging failures is minimal as confidence collapses after one or two failed sessions

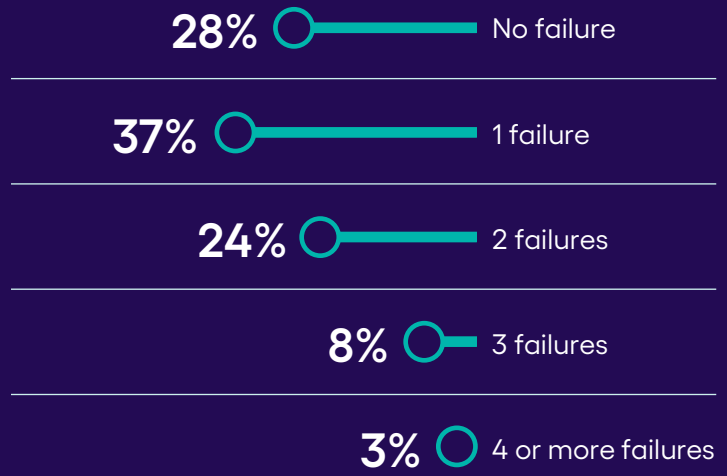
Users expect each charging session to reconfirm network reliability

More than one-third (37%) of users lose confidence in a charging network after only one public charging failure per ten sessions, indicating users have a low failure tolerance threshold.

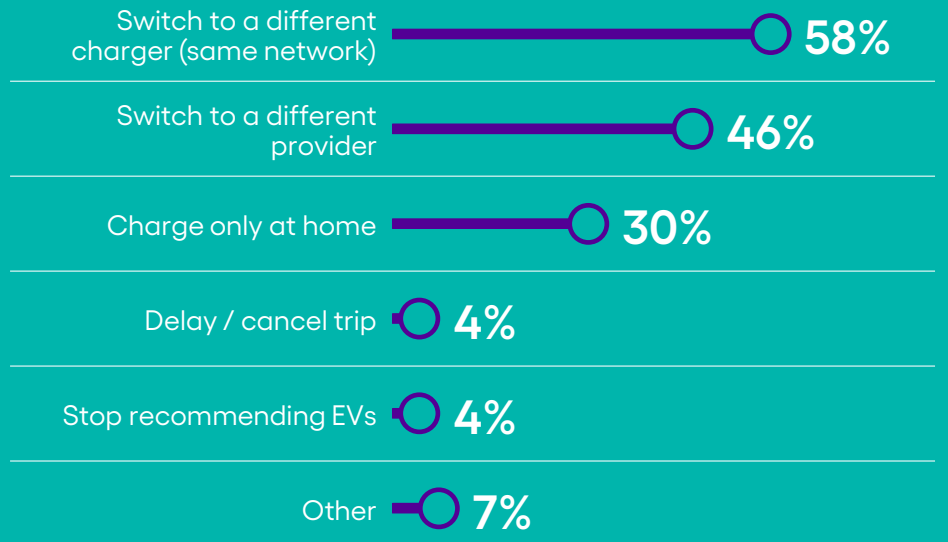
Once trust breaks, 46% of users switch charging networks and 30% retreat to home-only charging, reflecting fragile customer loyalty.

4% of users indicate that repeated public charging issues would deter them from recommending EVs to others entirely.

Acceptable charger failure threshold (per 10 sessions)



User response when charger failure threshold is reached



Q4a. Out of every 10 times you used a public charger, how many failures of any type (e.g. broken, payment error, or not delivering expected charge) would you consider acceptable before losing confidence in that network?
Q4b. If your personal failure threshold at a location is reached, how would you typically respond?

Proactive information and real-time support drive recovery in user trust after public charging failures

Predictive, proactive, transparent information creates more brand trust than post-failure compensation

There are three key actions that yield the highest scores in recovering trust after public charging failures:

80%

of users indicate real-time outage alerts in-app before a driver arrives at a public charger would have a strong impact on restoring trust

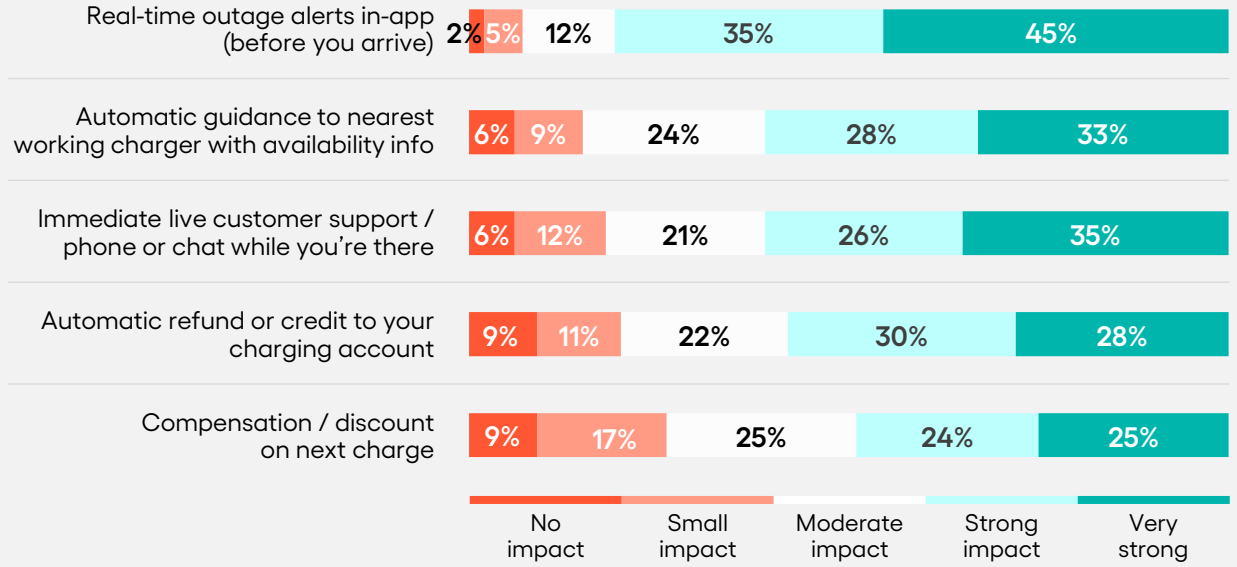
61%

of users indicate automatic guidance to the nearest working charger with information on its availability and immediate live customer support while experiencing a public charger failure would have a strong impact on restoring trust

EV drivers seek agency—control and predictability—not just monetary reparation. As such, information transparency about public charger status has more of a positive impact on users than monetary compensation.

The implication for charge networks is clear: invest in real-time communication and problem resolution over financial incentives because real-time public charging reliability is perceived as proof of charge network maturity.

Trust-restoring actions in case of public charger failures



Note: Numbers may not total 100% due to rounding.

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A5. When a charger does not work properly, how much would each of the following actions restore your trust in that network?

More chargers in convenient locations and faster, consistent charging speeds would most improve user trust in charge networks

EV drivers want improved charger accessibility and faster charge times

The top public charging improvements that users seek are more chargers in convenient locations (63%), faster, consistent charging speeds (35%), and faster repairs (uptime) (32%).

Payment integration (11%) and transparent pricing (13%) are secondary improvements, indicating that operational reliability trumps cost factors in importance for users.

Public charging improvements that would increase user trust

- 63% More chargers in convenient locations
- 35% Faster / consistent charging speeds
- 32% Faster repairs / higher uptime
- 26% Real-time availability / reservations
- 13% Transparent pricing
- 11% Better payment & app integration
- 9% Better safety / lighting
- 6% Visible service presence
- 5% Other

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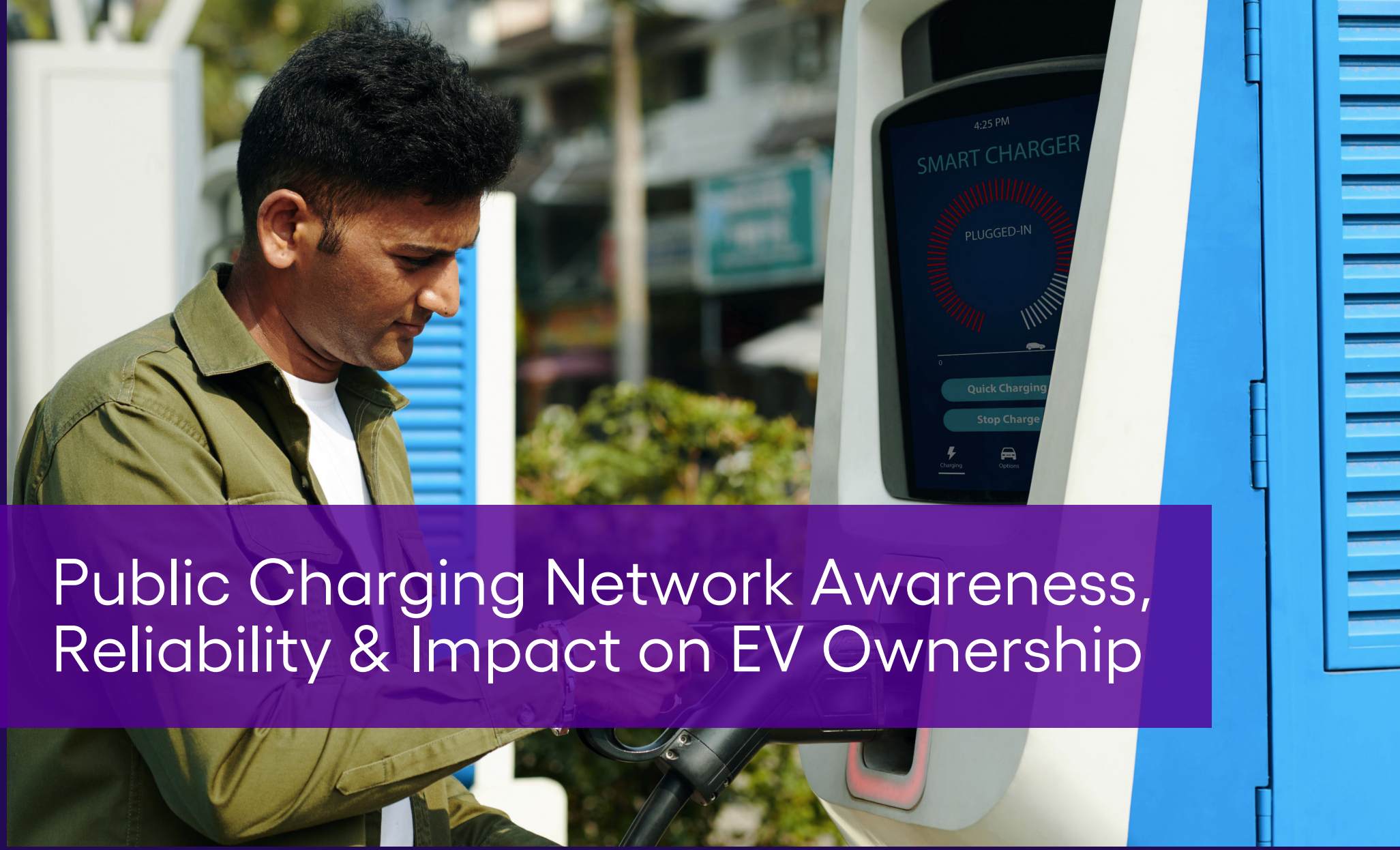
Q8. Which TWO of the following improvements would most increase your trust in public charging systems?

3 Public Charging Network Awareness, Reliability & Impact on EV Ownership



Tesla dominates charge network usage and reputation while other networks lag despite brand familiarity

Consumer awareness of public charging network brands is highest for Tesla (97%) and ChargePoint (91%), but usage sharply diverges: 67% of EV drivers have used Tesla public chargers in the past six months while 40% have used ChargePoint public chargers.

However, these two brands dominate both recall and utilization, while other brands are further behind.

Mid-tier players such as EVgo (88% awareness and 22% use) and Electrify America (80% and 32%) have high awareness but lag in active user conversion, signaling possible trust and/or accessibility barriers.

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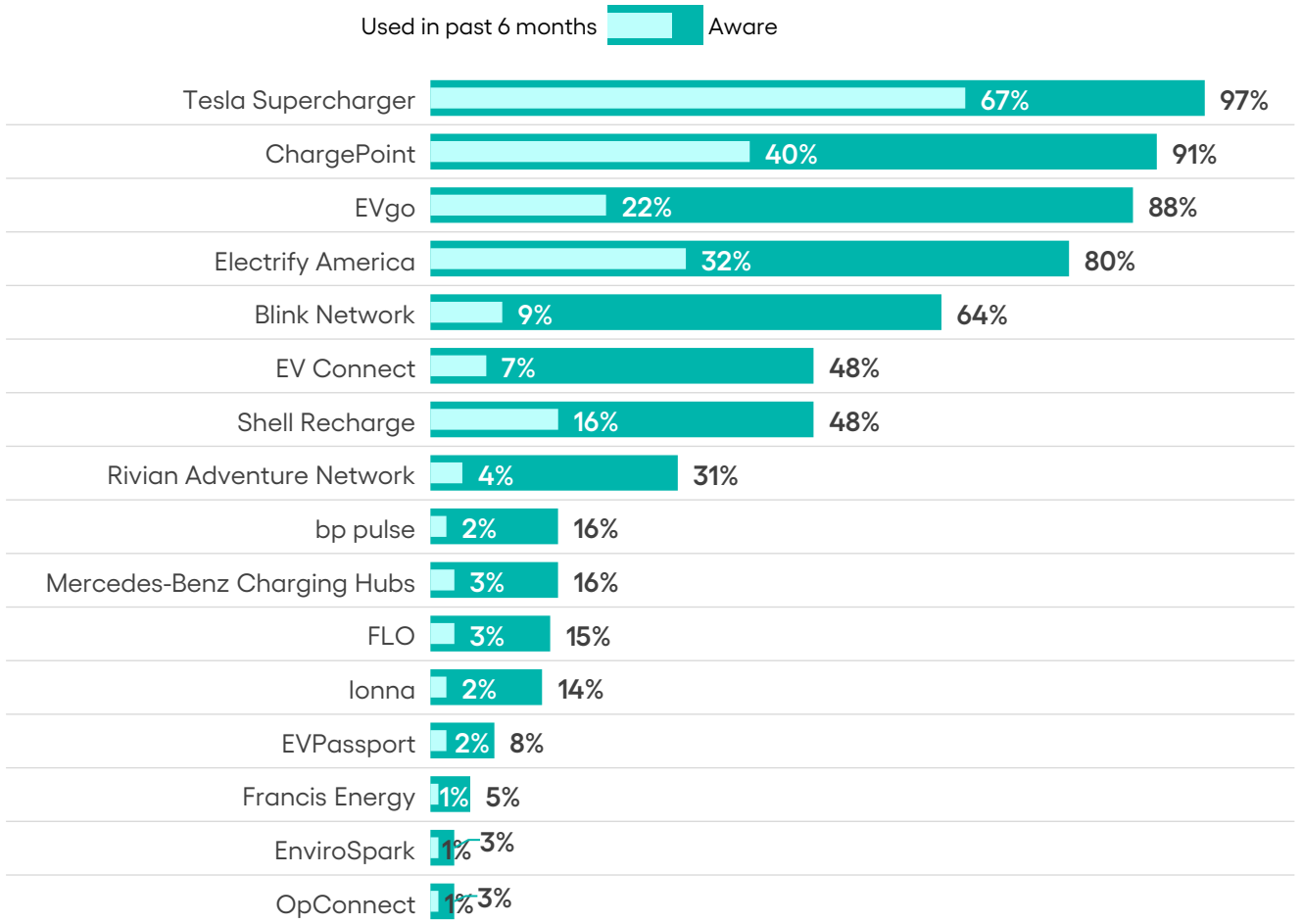
Q6a. Which of the following public charging networks have you ever heard of?
Q6b. Which of these networks have you personally used to charge your vehicle in the past 6 months?

Public charging network brand awareness and usage



On average, all main charge networks meet or exceed public charging reliability expectations

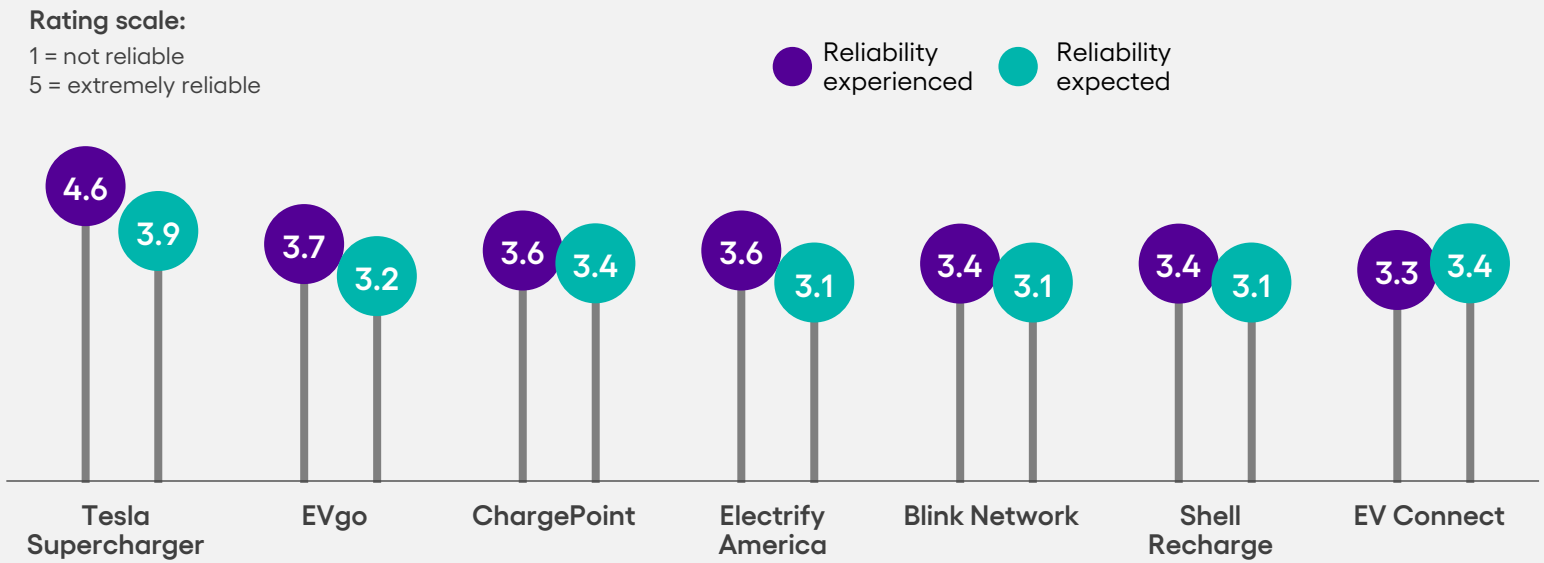
Public charging is more reliable than users expect to experience with most main charge networks

The Tesla Supercharger network leads the public charging market in both how reliable users expect this network to be (3.9 on a scale of 1 to 5 where 1 is not reliable and 5 is extremely reliable) and how reliable users have experienced this network to be in the past six months (4.6 on the same scale).

However, almost all main public charge networks we tested in the study delivered reliable experiences that surpassed how reliable users expected the network to be.

This means public charging networks have a large opportunity to promote how reliable their chargers are to customers.

Experienced vs. expected reliability of public charging networks
(mean scores)



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Q6c. Thinking about your own charging sessions in the past 6 months, how reliable has each network been for you?
Q6d. Among these charge networks that you are aware of but haven't personally used in the past 6 months, based on what you know or have heard, how reliable do you expect each of these networks to be?

Charging reliability directly shapes EV driver advocacy and future EV purchase intent

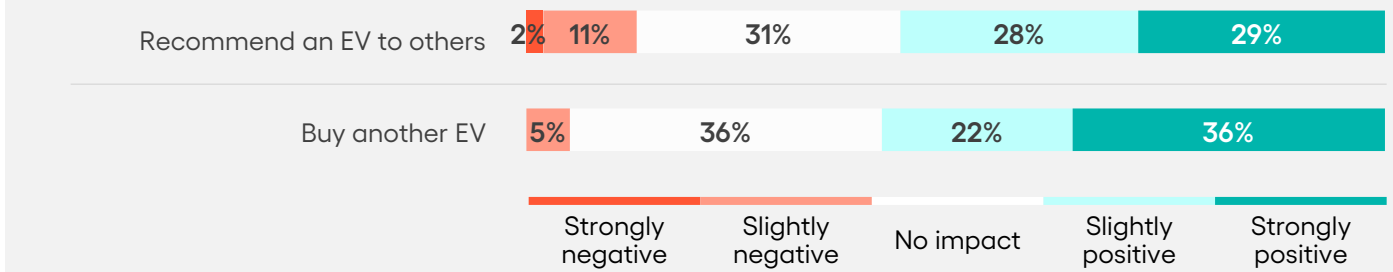
Therefore, improving charging network trust can directly accelerate EV adoption beyond current owners while equally ensuring EV owners purchase another EV when they look for a new vehicle. OEMs can leverage this by partnering with public charging networks and promoting reliable public charging access as part of the EV ownership experience.

Reliable public charging isn't simply a matter of infrastructure—it's marketing

Consumer perception of public charging reliability is not simply a service metric: it drives EV advocacy and repurchase intent. 57% of EV drivers say public charging reliability strongly influences their willingness to recommend EVs to others while 58% say it impacts their own intent to repurchase an EV.

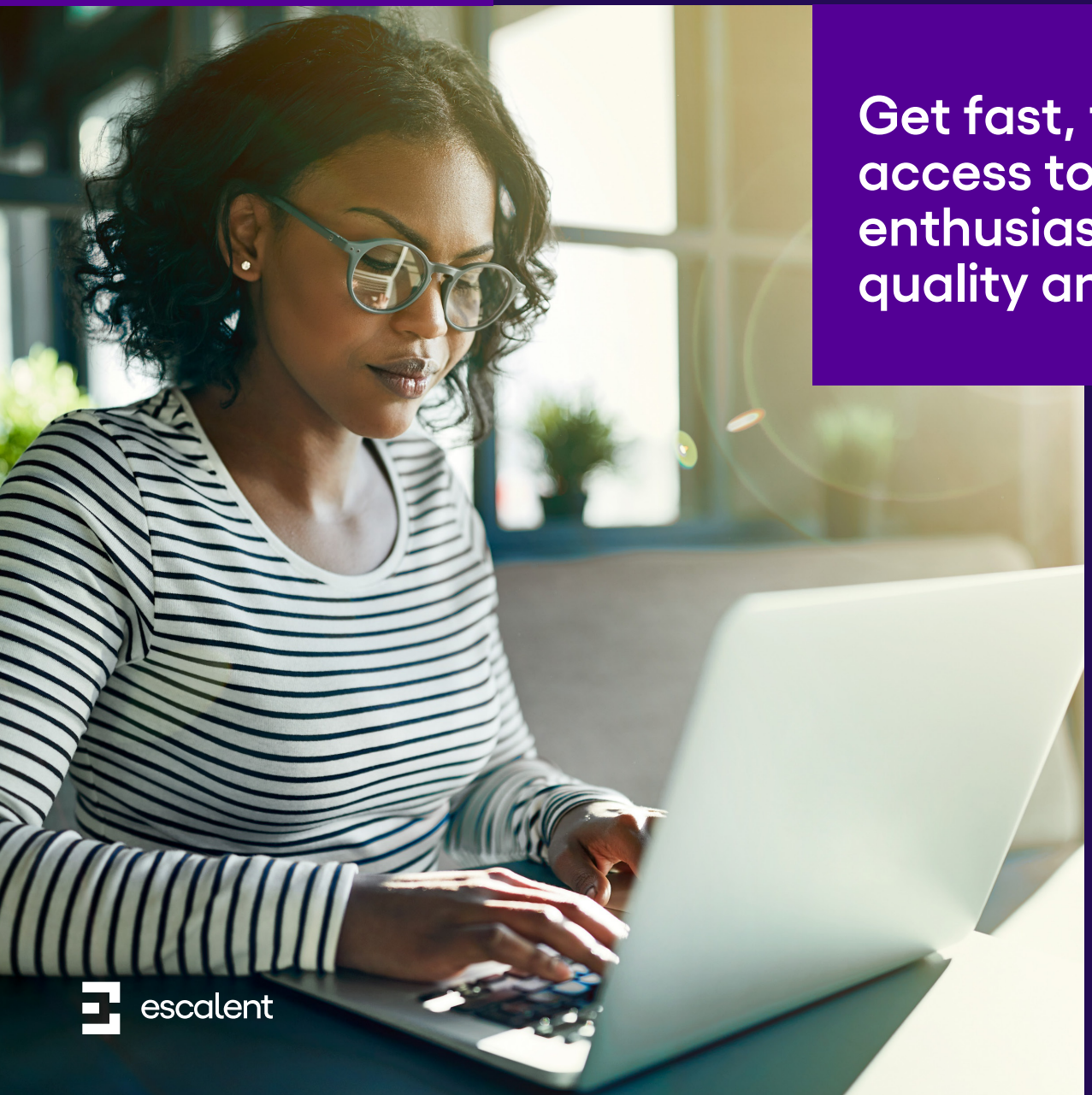
This demonstrates that users' perception of public charging reliability is an important behavioral driver, not just a service key performance indicator. If EV drivers feel confident that they can charge easily and reliably in public, they're more likely to encourage others to buy EVs—creating a positive cycle that drives adoption.

Impact of confidence in public charging reliability



Q7. To what extent does your confidence in public charging reliability influence your decision to (a) recommend EVs to friends or family and (b) buy another EV for yourself?

Want More?



Get fast, flexible access to EV enthusiasts, with quality and depth

Tap into My Driving Power™ to support your product, service, experience or brand and marketing development process, longitudinally or at a point in time.

DEEP QUAL INSIGHT

Connect with EV enthusiasts on a more intimate level and build trust, empowering them to open up about their challenges and needs. Target specific consumers (e.g., geography, vehicle segment) who best meet your needs.

AGILE 24/7 ACCESS

The community is always-on, allowing you to field research whenever you need—no waiting, no overhauls—with 24/7 access and pre-screened participants who can respond asynchronously.

COST-EFFECTIVE ROI

Save costs on ad hoc projects (such as recruitment, running research and stakeholder socialization) and work with industry experts who won't need to ramp up on your business needs.

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About Escalent

Escalent is an AI-enabled market research and advisory partner with unmatched industry expertise. For 50 years, we have been catalysts of progress—turning a deep understanding of our clients' worlds into smarter strategies and transforming human and market insight into decisive action that helps brands outthink disruption and accelerate growth. Following the acquisition of C Space and Hall & Partners in 2023, our 1,600-strong global team now offers a true one-stop shop for industry intelligence, customer insight and brand strategy. Headquartered in Livonia, Michigan, Escalent operates across the US and in Australia, Canada, China, India, Ireland, the Philippines, Singapore, South Africa, the UAE, and the UK.

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+1 734 542 7600 INFO@ESCALENT.CO