

DRIVECO

The electric revolution at your fingertips



THE FRENCH DRIVERS AND ELECTRIC MOBILITY: BETWEEN ADHESION, EXPECTATIONS, AND ACTION

Toluna-Harris Interactive for DRIVECO
November 2025





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INTRODUCTION

Electric mobility is no longer a promise for the future, but **a reality experienced by millions of French people**.

In 2024, DRIVECO launched with Toluna-Harris Interactive an unprecedented barometer on French attitudes towards electric cars. **Renewed in 2025 with over 3,200 drivers (including an oversampling of 250 electric vehicle drivers)**, this new edition confirms underlying trends while revealing significant changes in perceptions and uses.

This survey first confirms **the unwavering attachment of the French to automobiles** - nearly 9 out of 10 declare being attached - and highlights **the increasing place of electric cars in imaginations** as well as practices.

The image of the electric vehicle continues to improve: **53% of the French drivers now have a positive image** (+1 point in one year), particularly among younger people and in the Île-de-France region, even though it remains contrasted and still marked by **three major obstacles: purchase price, autonomy, and charging**.

The findings of this new annual DRIVECO barometer also reveal **a gap between perceptions and reality**: while many still fear restrictive usage, electric vehicle drivers express a record level of satisfaction (**98% declare being satisfied with their vehicle**). They emphasize **comfort, ease of use, and driving pleasure**, confirming that they now use their electric vehicle for all types of trips in 72% of cases, including **long journeys and holiday departures**.

At the same time, the study highlights strong expectations: **making models more financially accessible, accelerating the development of the charging network** (whose perception is improving but still considered imperfect), and **providing more guarantees on the overall environmental impact of the EV**.

Many drivers have now made the leap: it remains to convince the hesitant.



01

INTRODUCTION AND KEY HIGHLIGHTS

THE CEO'S VIEW



Ion Leahu-Aluas,
CEO, DRIVECO

The results of this second edition of the Deep Drive barometer are unequivocal: **electric mobility is no longer a promise for the future**, but a reality experienced by millions of French people. However, this revolution remains incomplete: it faces **generational, territorial, and social gaps** that urgently need bridging.

Our mission, as actors in electric mobility, is clear: to **remove these financial, technical, and psychological barriers**. This involves concrete solutions: **a network of fast and ultra-fast charging stations accessible to all**, clean and competitive energy, as well as an affordable offer, including on the used market and via social leasing.

The market is evolving quickly, and many of these solutions already exist or are being deployed: **vehicles are increasingly numerous and more performant**, the financial equation is increasingly advantageous, and **the charging network is expanding significantly**. However, the study shows that **efforts to convince skeptics must be intensified** to fight misconceptions and sometimes misinformation.

The energy transition will not happen without the trust of the French drivers. It calls for collective mobilization. Manufacturers, public authorities, energy providers, and operators must work together to **make this transformation fair, inclusive, sustainable, and well understood**.

This report provides an objective and illuminating snapshot of French perceptions, usages, and expectations. Signals to **decode together to build the electric mobility of tomorrow**.



EXPERT PERSPECTIVE



This 2025 study shows **a strong attachment to electric vehicles** among their users. However, it also highlights that broader adoption remains hindered by cost, range expectations, and disparities in access to charging. The democratization of electric vehicles will depend on **reducing these perceived gaps** and **demonstrating collective effort**, with a clear direction to **foster broader engagement** from drivers on this path.

Magalie Gérard

Deputy Director, Policy & Opinion Department, Toluna-Harris Interactive

MAJOR TRENDS 2025

ELECTRIC VEHICLES ARE BECOMING INCREASINGLY COMMONPLACE:

72%

of EV owners use theirs for several types of trips: daily, long trips, and vacations, including 25% for vacations (vs 22% last year).



AN IMAGE ON THE RISE, DRIVEN BY YOUNG AND URBAN AUDIENCES:

53%

French people have a positive image of EVs (+1 point vs. 2024), supported by 71% of 18-24 year olds and 66% of Paris region residents, compared to only 38% of those aged 65 and over.



REAL DESIRE, CAUTIOUS ACTION:

Only 20%

Future buyers are considering an EV as their next car, but believe that a range of 653 km would be needed to fully reassure them.



AN EXPERIENCE WIDELY PRAISED:

98%

of electric vehicle (EV) users say they are satisfied, surpassing internal combustion vehicle users; the comfort, ease of use, and driving pleasure are highly praised.



CONTRASTS WITHIN CHARGING HABITS:

82%

Drivers praise the quality of public charging stations, but access to home charging is declining (78%, -7 points).



PRICE, THE ACHILLES' HEEL OF A POPULAR REVOLUTION:

57%

of French people cite purchase price as the main barrier (+9 points vs 2024), followed by 45% who mention range anxiety, considered too low (stable).



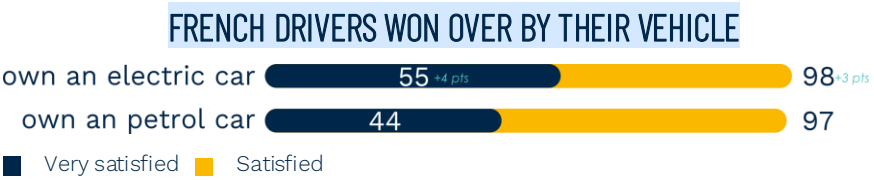
Try it, and you'll love it! But for everyone to be able to try it, electric mobility must be made simple, affordable, and visible.

02

STATE OF USAGE, PERCEPTIONS, AND THEIR EVOLUTION

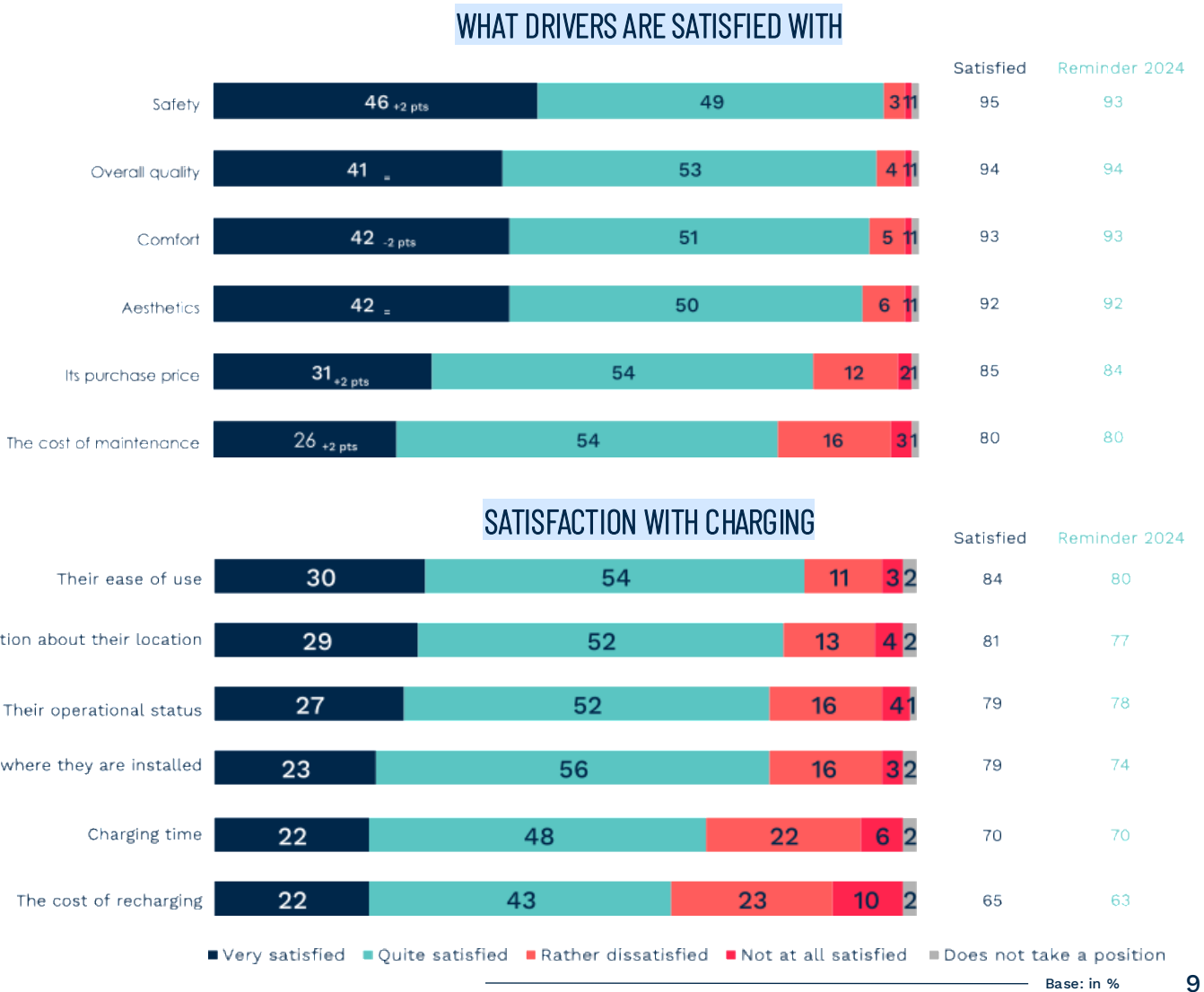
A RECORD SATISFACTION AMONG EV OWNERS

Usage confirms the attractiveness of the electric vehicle: **98% of owners say they are satisfied with their car**, including 55% very satisfied, a level (41%). Comfort, ease of maintenance, and **higher than that of internal combustion engine drivers** driving pleasure are among the best-rated dimensions, with scores above 90% among EV drivers.



Satisfaction also extends to infrastructures: **82% of EV drivers are satisfied with public charging stations**, particularly for ease of use (84%) and location (79%). However, there remain **expectations about cost** (only 65% satisfied) and **network density**.

This positive experience reinforces loyalty: **only 13% of EV drivers consider returning to internal combustion vehicles**, confirming that once adopted, the electric vehicle becomes a durable choice.



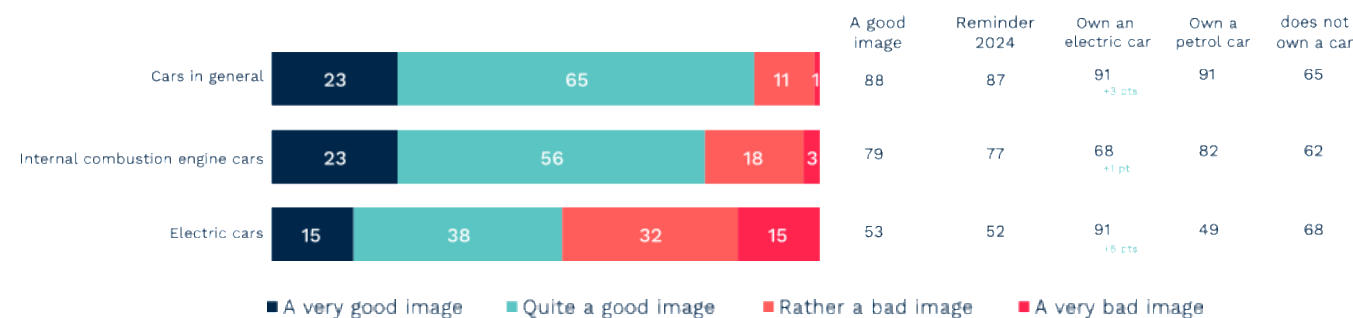
THE ELECTRIC VEHICLE, A TRUE SOURCE OF PRIDE

The image of the electric vehicle, already mostly positive last year, has slightly increased: **53%** of French people have a positive image (+1 point vs 2024). This perception is especially strong among 18-24 year-olds (**71%**) and in Île-de-France (66%, +4 points), while remaining minority among those 65 and older (**38%, -3 points**) and outside Île-de-France (<50%).

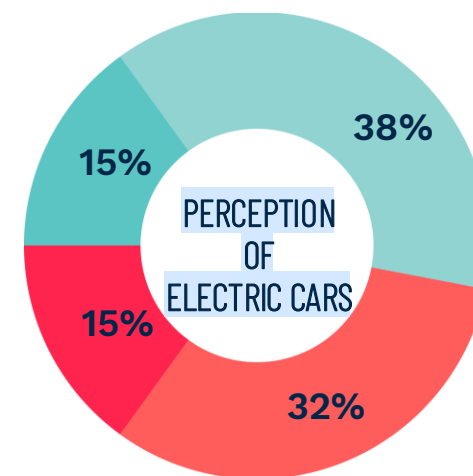
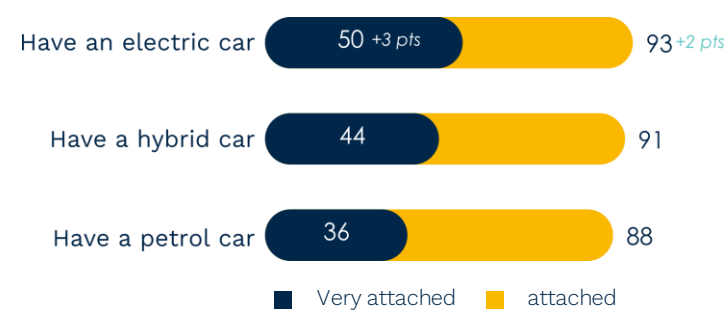
Beyond the image, emotional attachment evolves: **50% of EV drivers say they are “very attached” to their car** compared to **36% of combustion engine drivers**. This experience fosters stronger adhesion, confirmed by record satisfaction levels (98% of owners satisfied).

The trend is real but segmented, **driven by youth and urban areas**. The strong attachment and almost unanimous satisfaction of EV owners validate the experience, suggesting **a powerful lever for recommendation and conversion**.

DO YOU HAVE A POSITIVE OR NEGATIVE IMAGE OF ELECTRIC CARS?



DRIVERS' ATTACHMENT TO THEIR VEHICLE



■ A very good image ■ Quite a good image ■ Rather a bad image ■ A very bad image

EXPERT PERSPECTIVE



“Try an electric vehicle, you’ll love it”: drivers know it, and younger generations approach the shift to electric mobility with openness and enthusiasm. The next step is to bring everyone on board by **showing that charging works well and that battery capacity is sufficient.** With new, more affordable vehicles entering the market, **this will pave the way for the full democratization of electric mobility.**

Lucie MATTERA

Secretary General of ChargeUp Europe

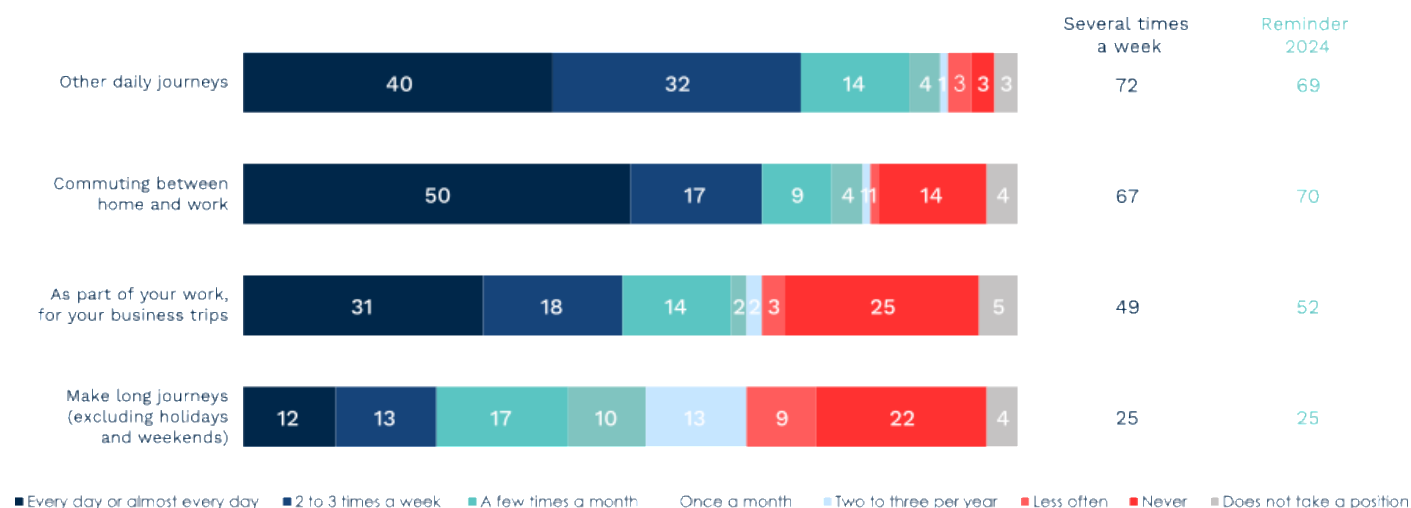
THE DIVERSIFICATION OF USES ENABLED BY FAST CHARGING

The electric vehicle is no longer limited to short trips: **72% of drivers use it several times a week for all types of journeys**, including commuting (67%) and long-distance travel (49%). **More than 4 in 10 owners (42%) also use it regularly for holidays or weekend getaways** - a share that rises to 60% among those under 35 and 59% in the Greater Paris area.

Charging habits are evolving alongside this diversification of uses. While **a majority still charge at home** (78%, down 7 points vs. 2024), public infrastructure is playing an increasingly important role: **54% of users now favor fast chargers** (50–150 kW), a choice strongly correlated with those who travel long distances.

These practices mark a turning point: far from being a niche use, **the EV is establishing itself as a regular and reliable mobility solution** - capable of covering both everyday travel and long-distance journeys.

ELECTRIC VEHICLES ARE BECOMING SUITED TO ALL USES





EXPERT PERSPECTIVE



At **La Chaîne EV**, we're obviously big fans of electric cars. We could understand why some people might still be hesitant—if their reluctance were based on solid arguments. But in reality, most critics of battery-powered cars form their opinions on misconceptions!

If everyone knew the pleasure, comfort, and convenience that come with driving an electric car, very few would still be reluctant! We see it every day among our followers: once you go electric, there's no turning back!

Jean-Christophe GIGNIAC

Founder of the YouTube channel « La Chaîne EV »

BARRIERS STILL HOLDING BACK ADOPTION

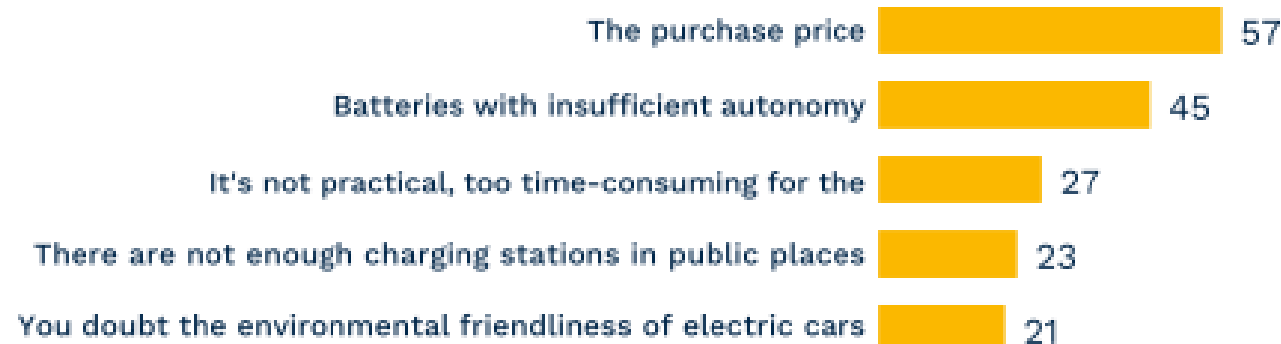
The French drivers want to believe in it... as long as electric mobility is accessible to everyone.

Support for electric vehicles is growing, but to turn that momentum into widespread adoption, **three key levers** still need to be activated:

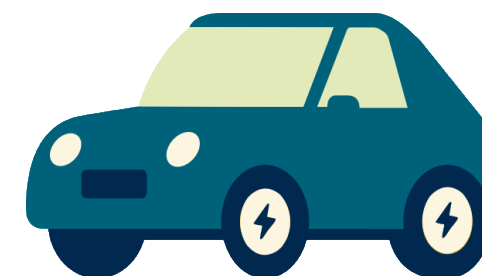
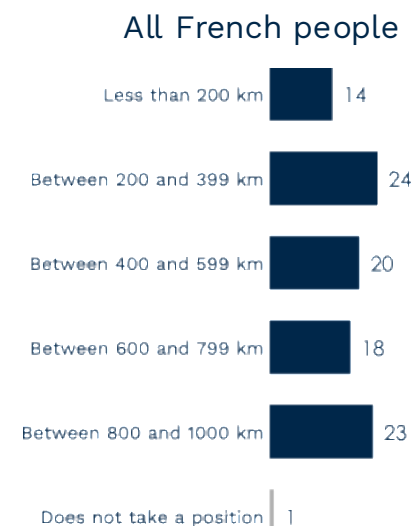
- **Price:** 57% of French people cite purchase cost as the main obstacle. Electric vehicles must become a realistic option for all budgets - notably through the used-car market and social leasing schemes.
- **Range:** Drivers believe they need 653 km of range to feel fully confident. The gap is narrowing, with new 2025 models now offering an average of 544 km.
- **Territorial equity:** Only 50% of people living outside the Greater Paris area have a positive image of EVs - a sign of a still significant geographic divide.

The French are ready to take action: **it's up to us to make electric mobility more affordable**, more reassuring, and more inclusive.

BARRIERS TO SWITCHING TO ELECTRIC VEHICLES



THE ACCEPTABLE RANGE OF AN EV IN KILOMETERS



The average range of new electric vehicles sold is

544 km

03

FOCUS ON GENERATIONAL AND TERRITORIAL DIVIDES

A YOUNG GENERATION UP TO THE GREAT CHALLENGES OF ITS TIME...

Young generations and urban residents are the true drivers of the electric transition. Among 18-24 year-olds, more than 7 out of 10 (71%) declare having a positive image of electric vehicles, an increase of +2 points compared to 2024. The dynamic is similar in Île-de-France, where 66% express a positive perception (+4 points).

Beyond the image, usage also reflects concrete commitment: 60% of under-35s say they use their electric vehicle at least once per month for weekend or holiday trips, compared to 42% on average.

With the 18-35 age group, we face a confident and open generation, which sees electric vehicles as ecological, modern, and suited for all types of trips, far beyond urban use only.

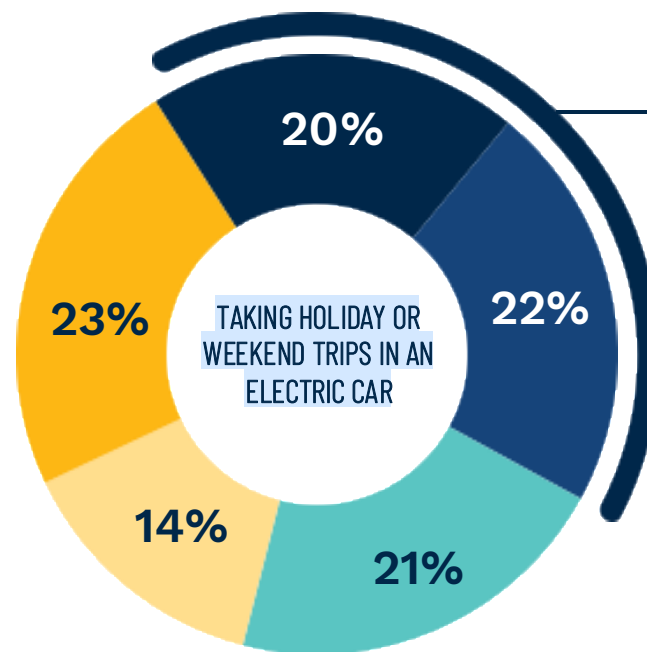


71% of 18-24-year-olds have a positive image of electric vehicles

PERCEPTION OF ELECTRIC CARS



■ A very good image ■ Quite a good image



TAKING HOLIDAY OR WEEKEND TRIPS IN AN ELECTRIC CAR

42%

of the drivers use their electric car once a month or more to go away for weekends or holidays.



Under 35:
60%



Greater Paris residents :
59%

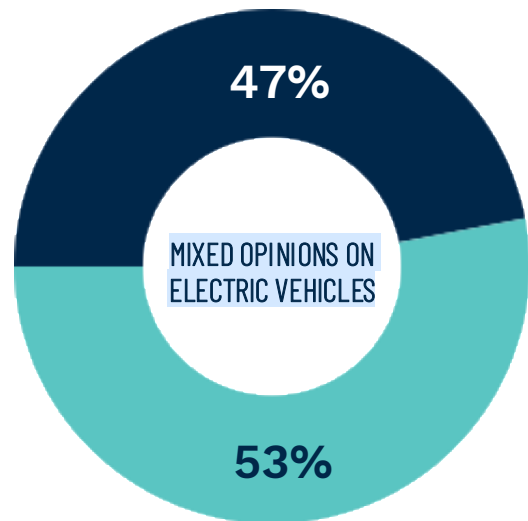
■ A few times a month ■ Once a month ■ Two to three per year
■ Less often ■ Never

...BUT THAT MUST CONVINCE ITS ELDERS

Conversely, seniors and residents outside major urban areas remain more reserved about electric mobility: only 38% of those 65 and older have a positive image of EVs (-3 points vs. 2024) and positive perception outside Île-de-France falls to only 50%, down 4 points. On average, opinions remain mixed in these territories.

The barriers highlighted differ markedly from younger generations. For 65% of those over 65, the high purchase price is the main obstacle. Additionally, 26% express doubts about the true ecological nature of EVs, reflecting a persistent lack of trust.

More skeptical and cautious, these groups are held back by cost, ecological skepticism - especially among seniors (25% vs. 21% in other groups) - and the perception that electric vehicles remain far from their daily needs.



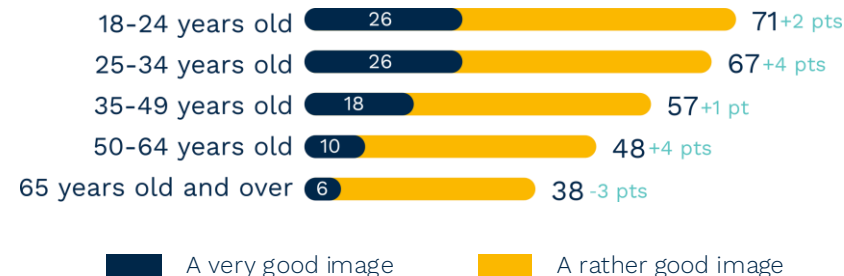
■ A passing trend ■ The future of mobility

"No range, not enough charging stations in good condition, too expensive, battery recycling issues."

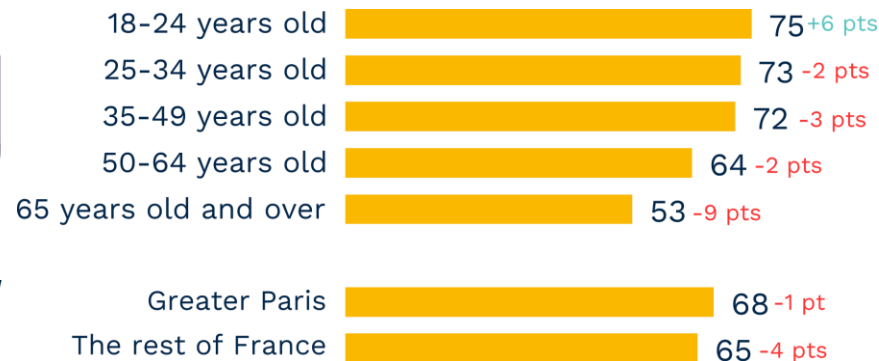


"Expensive, no range, pollutes differently but just as much as a combustion car, long charging time."

PERCEPTION OF ELECTRIC CARS



PLAN TO SWITCH TO OR BUY AN ELECTRIC CAR



04

PERSPECTIVES AND SOLUTIONS TO SUPPORT ADOPTION

EVs PUT TO THE TEST OF OUR CONTRADICTIONS

This 2025 study confirms a dual dynamic:

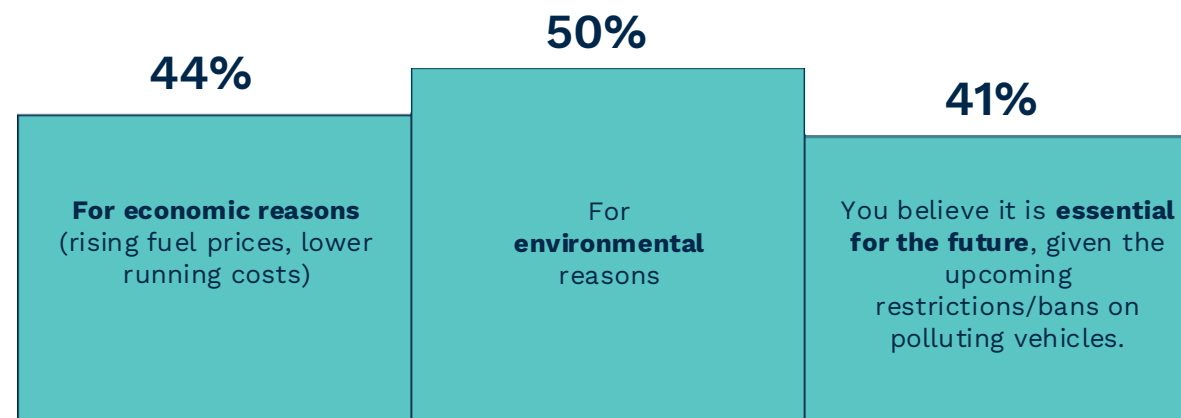
- **Strong momentum:** positive image, record satisfaction, broader usage, and younger and urban drivers leading the transition.
- **Persistent barriers:** purchase price, perceived range, unevenly distributed infrastructure, and both territorial and generational divides.

In a macro context marked by climate urgency, budget constraints, and public distrust toward government policies, the success of a large-scale shift to electric vehicles relies on three key levers:

- **Economic accessibility:** continue to democratize the offer and ensure a strong used-vehicle market.
- **Robust infrastructure:** support the acceleration of fast and ultra-fast charging deployment where users truly need it.
- **Trust and education:** inform about real-world usage and dispel unfounded fears (range, reliability, environmental impact).

This barometer shows that the EV is now seen as an essential solution for the future of mobility - but its mass adoption depends on our collective ability to turn this emerging trust into an accessible and sustainable reality

REASONS TO BUY AN ELECTRIC VEHICLE



WHAT NOW?

Electric mobility is increasingly becoming a lived reality — and this DRIVECO study conducted by Toluna-Harris Interactive confirms it.

Yet, the challenge of achieving broad public adoption still lies ahead. The success of this transition depends on three essential pillars: **education, trust, and accessibility.**

To achieve this, **DRIVECO calls for a collective effort:**

- Work hand in hand with manufacturers to make the offering more diverse and affordable.
- Install charging stations where users truly need them, ensuring everyone has simple and reliable access to charging.
- Unite all market players - notably through **ChargeUp Europe** - to build a coherent and sustainable ecosystem.

Electric mobility is already a reality, but its future depends on our ability to make it a fair, inclusive, and universally accessible choice.



ABOUT DRIVECO

Methodology

Online study conducted by Toluna-Harris Interactive from June 11 to 19, 2025, with a representative sample of French population aged 18 and over (3,277 people), supplemented by 250 EV owners. Representativeness ensured by quota method (gender, age, socio-professional category, region) with statistical weighting.

About DRIVECO

As a leading innovative electric vehicle charging company, DRIVECO's mission is to bring electric mobility within everyone's reach. We strive to deliver the most seamless user experience, establish the most reliable network, and utilize renewable energy resources in the pursuit of a greener, more sustainable society. DRIVECO is a network of 1 400 charging stations in operation, and the largest network of charging points open to the public in France, with the best operational rate on the market (99%). Since its inception, DRIVECO's charging stations have enabled the charging of 280 million kilometers driven in electric vehicles, equivalent to 7 000 times around the Earth. With more than 56 000 tons of CO2 avoided, DRIVECO has supplied more than 48 million kWh of electricity since its establishment.

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