

The Social Charging Index

How can CPOs earn and retain EV drivers' trust?



September 2026

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91%

of EV drivers would
detour for a charger
recommended by
another driver.

Recommended
by Drivers



55%

would travel more
than five minutes
out of their way.



What were we looking to explore?

01

Objective:

To find out how EV drivers' charging experience and interactions with their peers influences trust.

02

Survey conducted:

August 2026 (online)

03

Respondents:

3,016 EV drivers, age 17 or above
Locations:
US/Canada (50%) Europe (50%)

04

Confidence:

Margin of Error: $\pm 1.8\%$ (95% confidence level)

What do we know already?

01

The EV charging market is maturing quickly:

- **Increased Competition:** There were 7m EV chargers globally at the end of 2025 – 5x more than in 2020 (IEA).
- **Driver Behavior:** 28% of US and European drivers said unreliable chargers would deter them from using a specific site (Vontier survey, 2025)
- **Uptime Standards:** Government-funded chargers in the US and Australia have contractual downtime limits, while UK regulations have introduced fines for CPOs if uptime drops below 99% over a 12-month period.

02

CPOs are moving from expansion to optimisation. According to the Driivz State of EV Charging Report 2026...

- **59%** of surveyed CPOs see network stability and reliability as their biggest challenge in 2026, rising to...
- **73%** of the largest operators (>50,000 users)
- **59%** are prioritising utilization to improve profitability – a 4x larger share than geographic expansion (15%).

Trust is vital for utilization.

It affects whether sites are re-visited, recommended or avoided.

How trust drives repeat visits

What happens when drivers get a good experience – and what if they don't?



What do drivers prioritize when charging?

01

Asked which factors most influence where they charge:

- **Charging speed** was the top answer at 47% (n=1,426)
- **Price** was second at 41% (n=1,226)
- **Location and convenience** was third, at 36% (n=1,075)

02

However, when asked what information was most valuable when selecting a specific site:

- **Reliability** was the top answer at 43% (n=1,292)
- **Pricing** came in a close second at 43% (n=1,290)
- **Queues** was third 29% (n=888)

How does trust influence future visits?

37%

Rated **previous experience with the network** as most trustworthy when visiting an unfamiliar charger.
(n=1,119)

37%

Said they trusted their **preferred charging network's app** which also infers loyalty
(n=1,110)

50%

Will **go out of their way** to re-visit good networks (35%, n=1,055) or avoid bad ones (15%, n=440)

How does trust influence future visits?

Which of the following statements do you agree with most?

Reliable charging gives me confidence to travel further

24% 

Once I find a reliable network, I rarely switch

20% 

Charger reliability is more important than price

19% 

I would pay more to use a charging network I trust

18% 

Charger reliability is more important than location

18% 

Confidence:

24% of EV drivers said reliable charging gives them the confidence to travel further (n=713).

Loyalty:

20% "rarely" use other networks once they've found a reliable one (n=606).

Revenue:

37% selected answers indicating that they would pay more to use a reliable network (n=1,118).

What happens when charging sessions fail?

78%

Are likely to **avoid using that charger again** (n=2,343) – including 41% (n=1,223) who are very likely to do so.

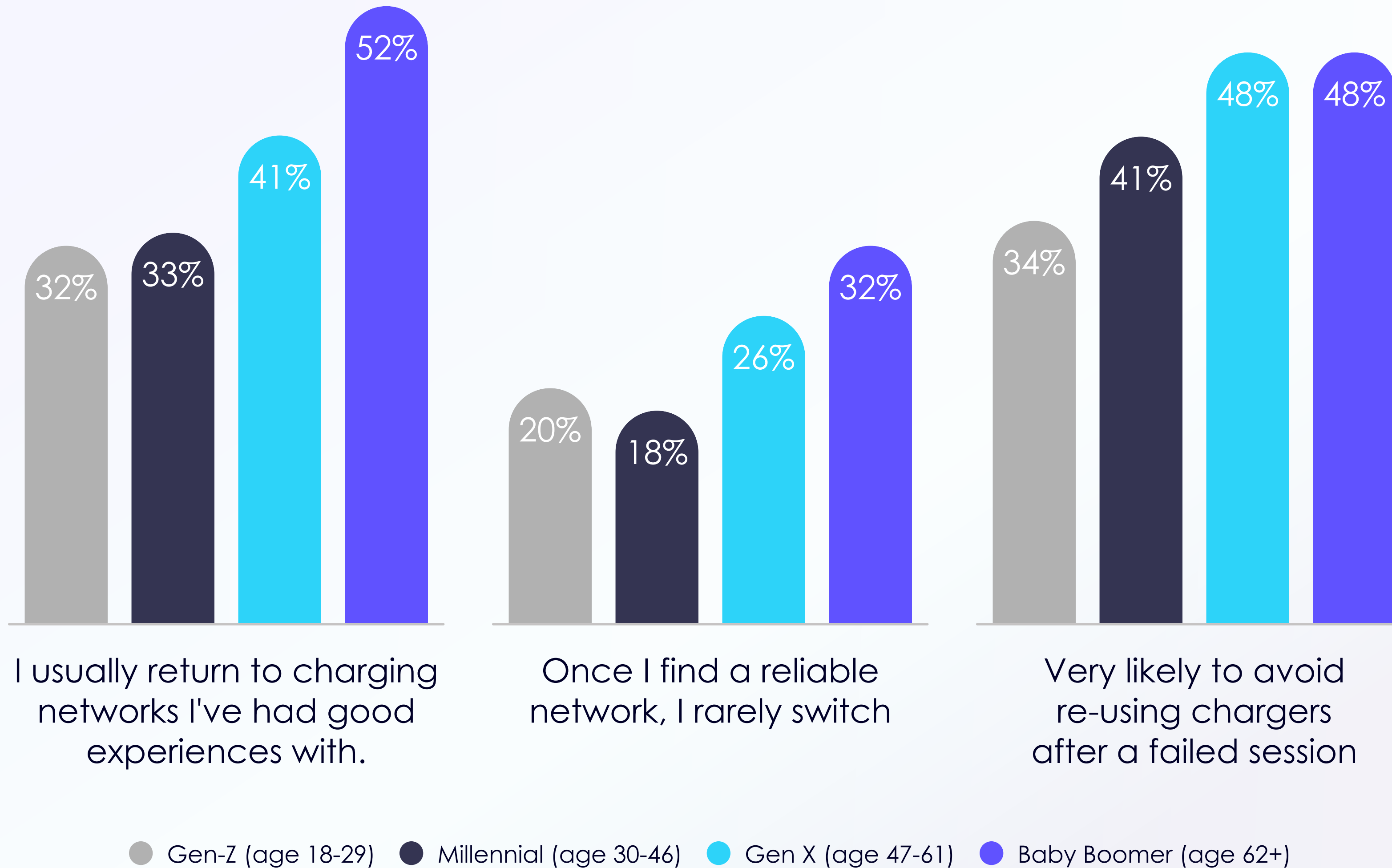
67%

Are likely **avoid re-using the network again** (n=2,008) while 28% (n=851) are very likely to do so.

77%

Failed sessions were the most likely reason to avoid networks (n=2,321) with 41% (n=1,249) very likely to do so.

Risk aversion increases with age



Older drivers trended towards being more likely to:

- Return to networks they have had good experiences with.
- Avoid sites following a failed charging session.

Exploring 'social charging'

How does the EV community
influence driver trust?



Where are EV drivers going for information?

Drivers seek others' experiences when visiting new locations...

- **Specialist charging apps** (such as Zapmap, PlugShare, Open Charge Map etc.) which enable users to share reviews with others, ranked as the most trustworthy source of information (n=1,009, 33%) – second only to
- drivers' own experiences

EV-driving friends and family was just behind at 32% (n=951)

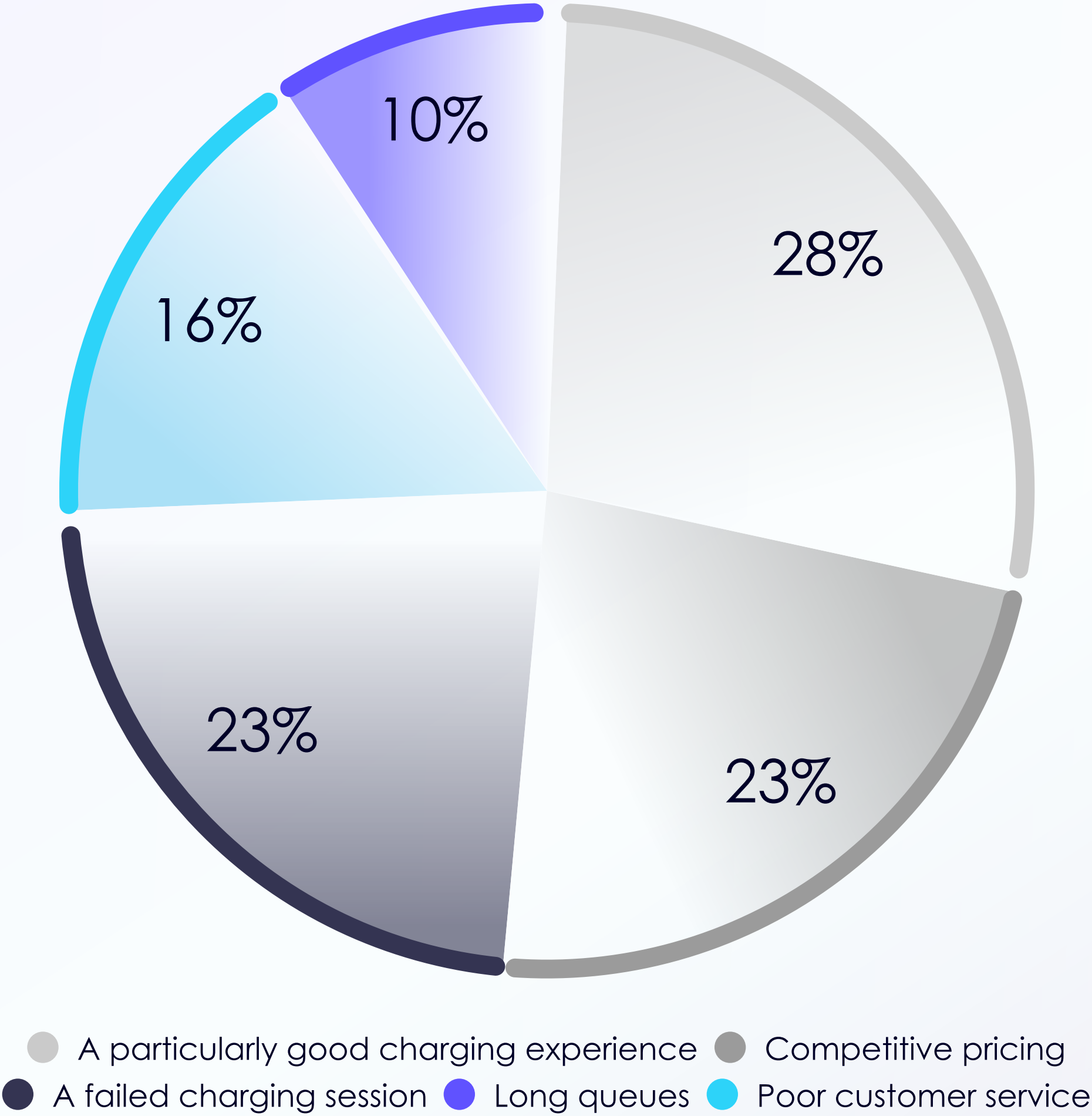
Satellite navigation and mapping apps were less likely to be used, at 27% of respondents (n=822)

And they're influential...

- **91% would make a detour** to use a location recommended by another EV driver
- (n=2,749), while...

55% would travel more than five minutes off route to do so (n=1,651)

What are EV drivers most likely to share?



42%

(n=1,265) are reporting positive experiences, but...

39%

(n=1,169) are telling others when visits haven't met expectations.

16%

(n=478) are rating on-site amenities – as these are an important part of visits with longer dwell times than filling with fuel.

What happens when charging sessions fail?

79%

Of drivers are likely to **warn friends or family** (n=2,388) including 40% very likely to do so (n=1,192)

76%

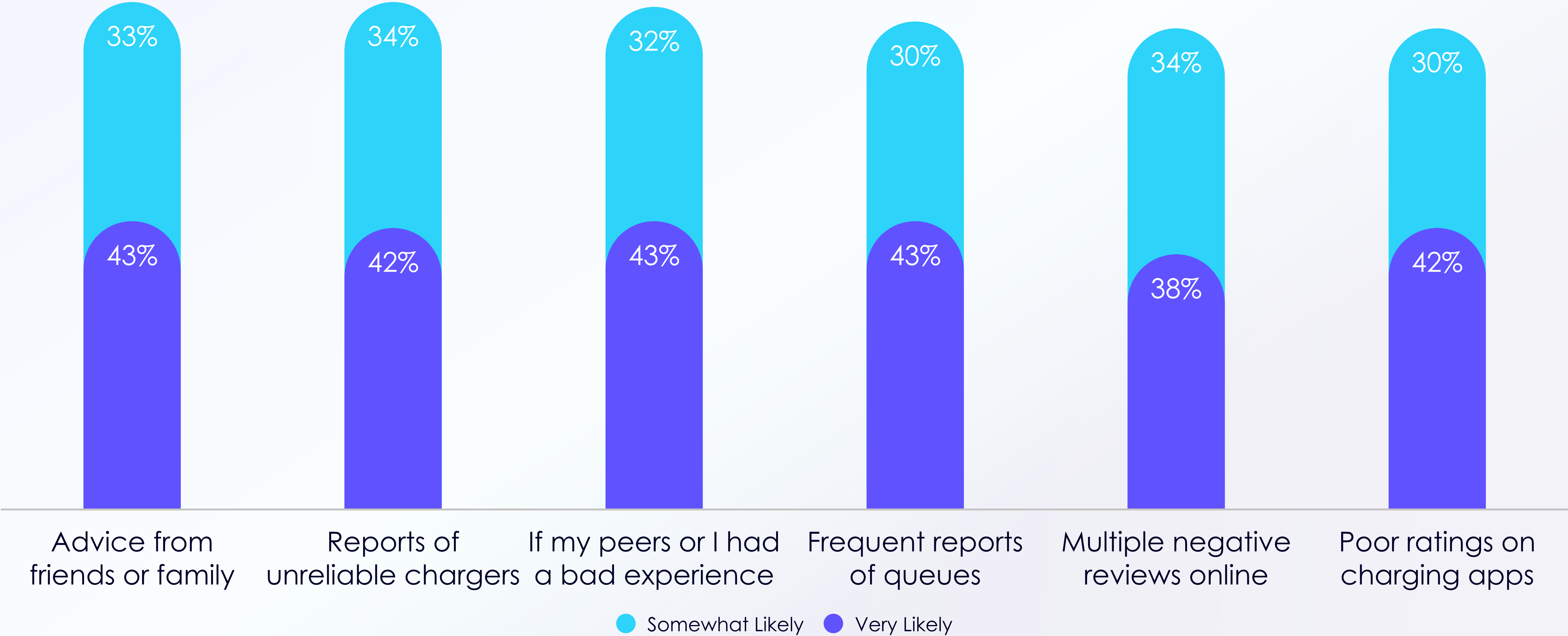
Would be likely to **report issues through an app** (n=2,288) including 36% very likely (n=1,080).

65%

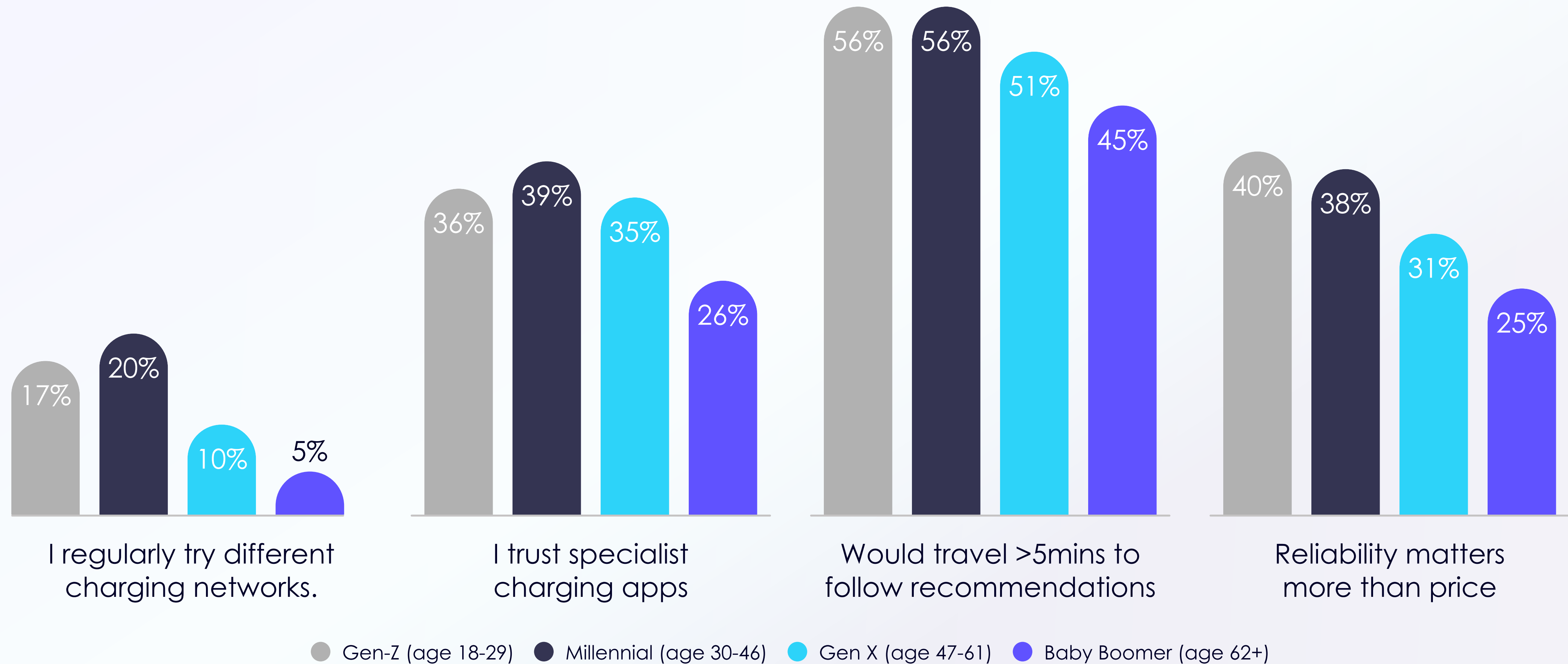
Are likely to **leave an online review** (n=1,972) including 25% (n=766) very likely.

Feedback from peers is influential

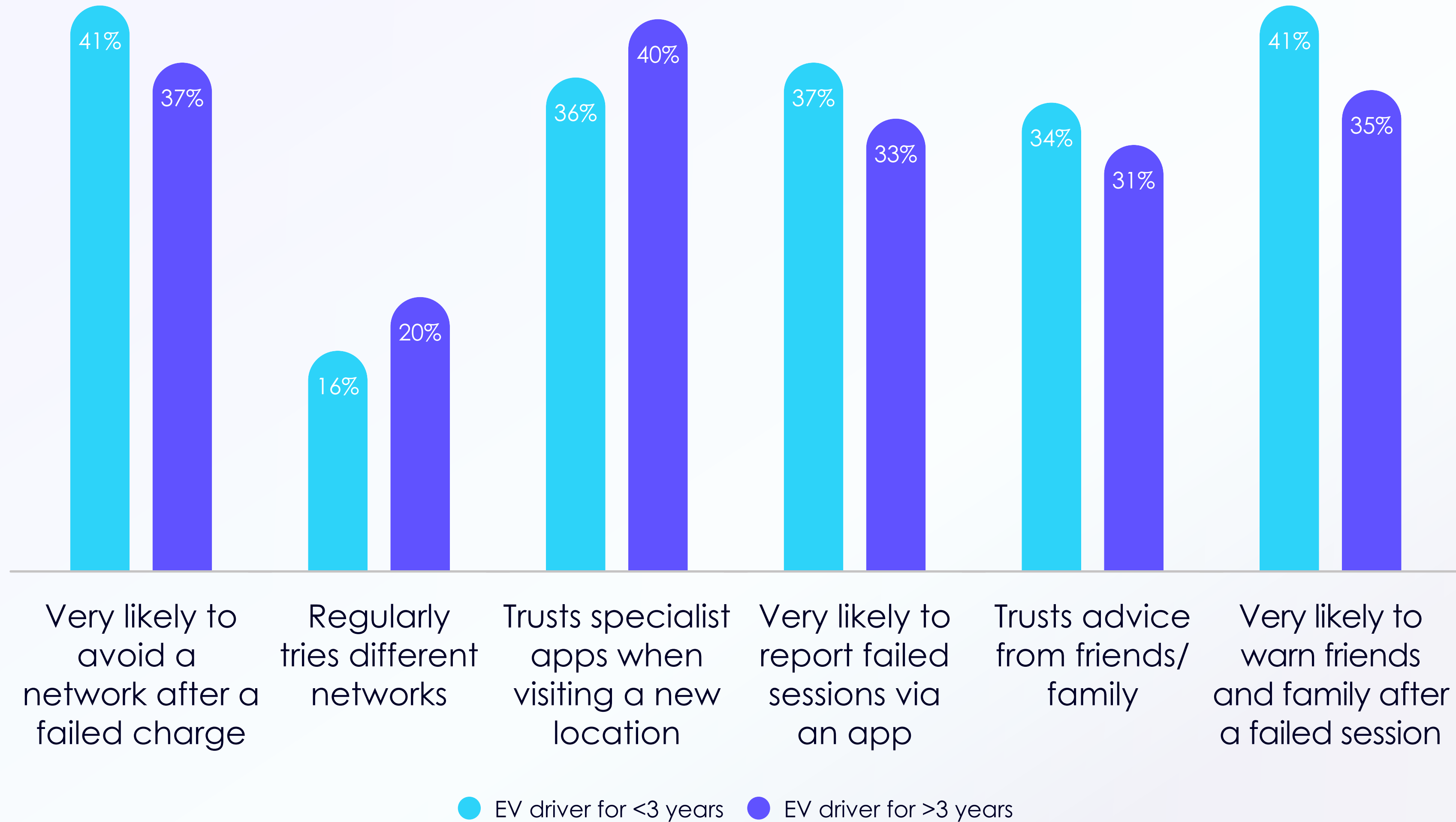
How likely is it that each of the following would make you avoid a charging network?



Loyalty and peer influence varies by age



New EV drivers also seek peer insights



Our survey reflects a fast-growing global EV fleet.

- **77%** have owned/leased an EV for less than three years (n=2,322).
- This incoming cohort is more likely to **share advice with friends/family**, and **abandon networks** that don't perform.

What can we learn from Norway?

01

Norway is the world's most advanced EV market, including:

- **96%**
EV share of new car registrations in 2025 (OFV data)
- **32%**
EV share of total vehicle fleet in December 2025 (SSB data)

02

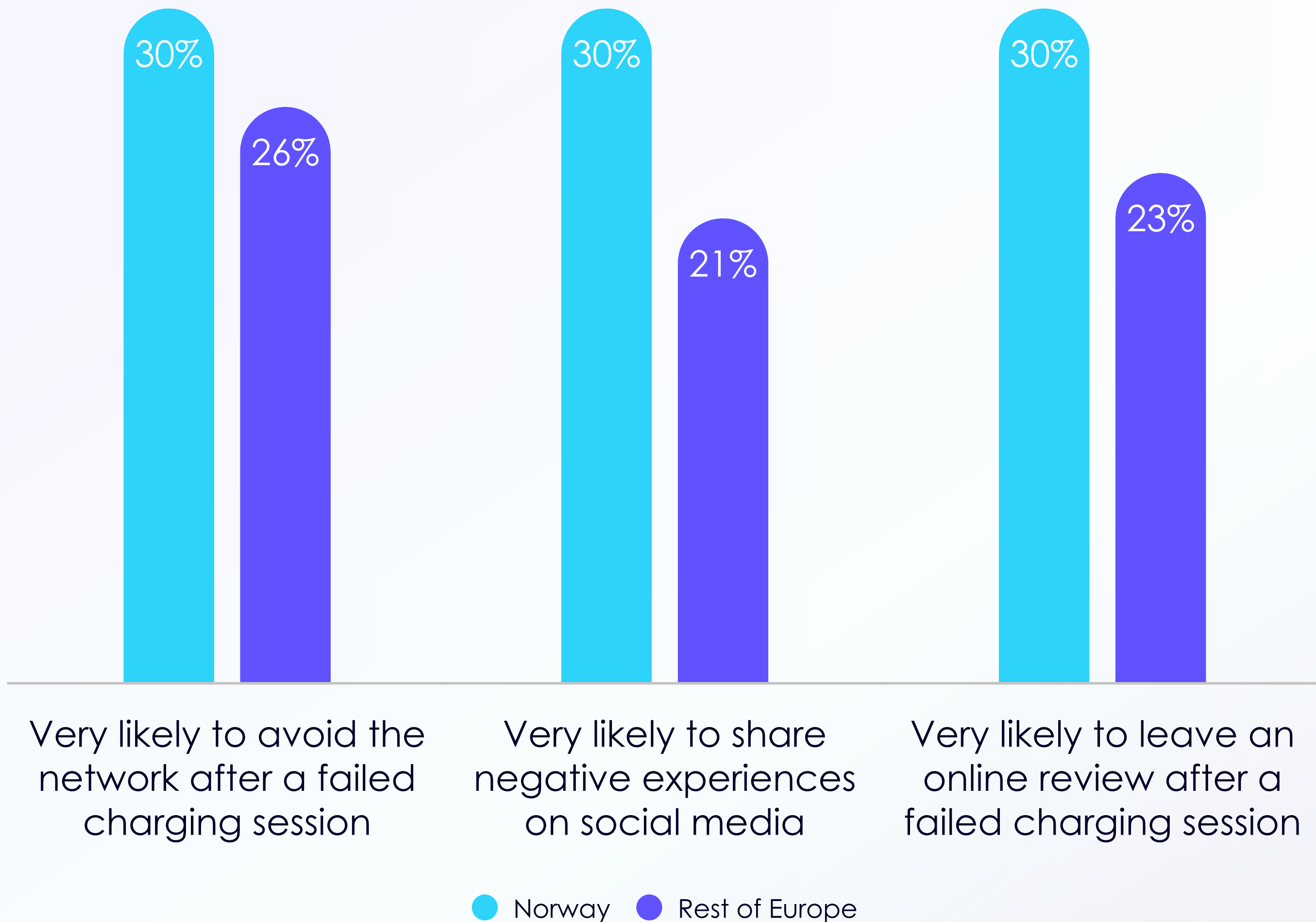
It also has the region's densest charging infrastructure:

- **45 sockets per plug-in vehicle** (26,878) compared to the other European markets in the survey (EAFO data):
 - **13** in France
 - **15** in Germany
 - **5** in the Netherlands
 - **25** in the United Kingdom

03

This can offer a glimpse of future pressures for CPOs in other markets.

What can we learn from Norway?



In the most competitive markets, drivers are less tolerant of poor experiences:

- Norwegian EV drivers were **more likely to abandon networks and/or share negative reviews** than other Europeans.
- And although they were more likely to say **reliability is more important than location** (24%, n=74) than drivers in other countries (16%, n=195).
- They **expect good experiences without long detours** - 41% (n=124) would accept a detour of more than five minutes for a recommended charger, compared to 59% (n=720) elsewhere.

What does the data tell us?

Conclusions and observations



Conclusions

01

Reliability is the foundation.

It's the most important aspect drivers look for when selecting places to charge, and they're willing to pay for it.

02

Social charging is the phenomenon.

Poor experiences don't happen in isolation – they're amplified through the community.

03

Reputation is the commercial outcome.

Drivers are willing to make detours for experiences they can trust – which benefits utilization and revenue.

About Driivz

Driivz, a Vontier (NYSE:VNT) company, is a leading global software supplier to EV charging operators and service providers, accelerating the plug-in EV industry's dynamic and continuous transformation. The company's intelligent, cloud-based platform spans EV charging operations, energy management, advanced billing capabilities and driver self-service tools.

Driivz's team of EV experts serves customers in 36 countries, including global industry players such as EVgo, Shell, Circle K, Volvo Group, Recharge, St1, ESB, Mer, Francis Energy, Ennet Corporation, Element and eMobility Power. The Driivz platform currently supports over 3M Ports and has processed over 50M transactions for millions of EV drivers in North America, Europe and APAC.

Contact us

www.driivz.com | Global: +1-714-7824494
Europe: +44-800-418-780 | US: +1-714-7824494

