



Consumer Research – Payment for Electric Vehicles

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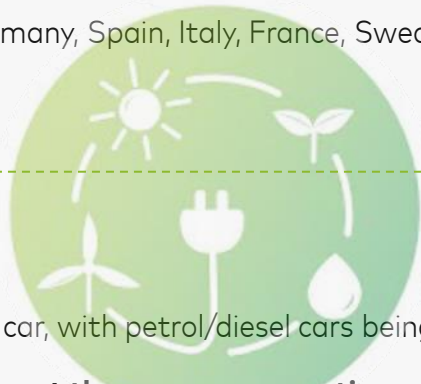
October 25, 2021

How do people want to pay for their electric vehicle charge?



Research design

- Timeframe: **Sept 2021**
- **Quantitative** study
- **7,489 respondents** evenly distributed from Germany, Spain, Italy, France, Sweden, Poland and Austria
- **30 questions**



Insights into European car drivers

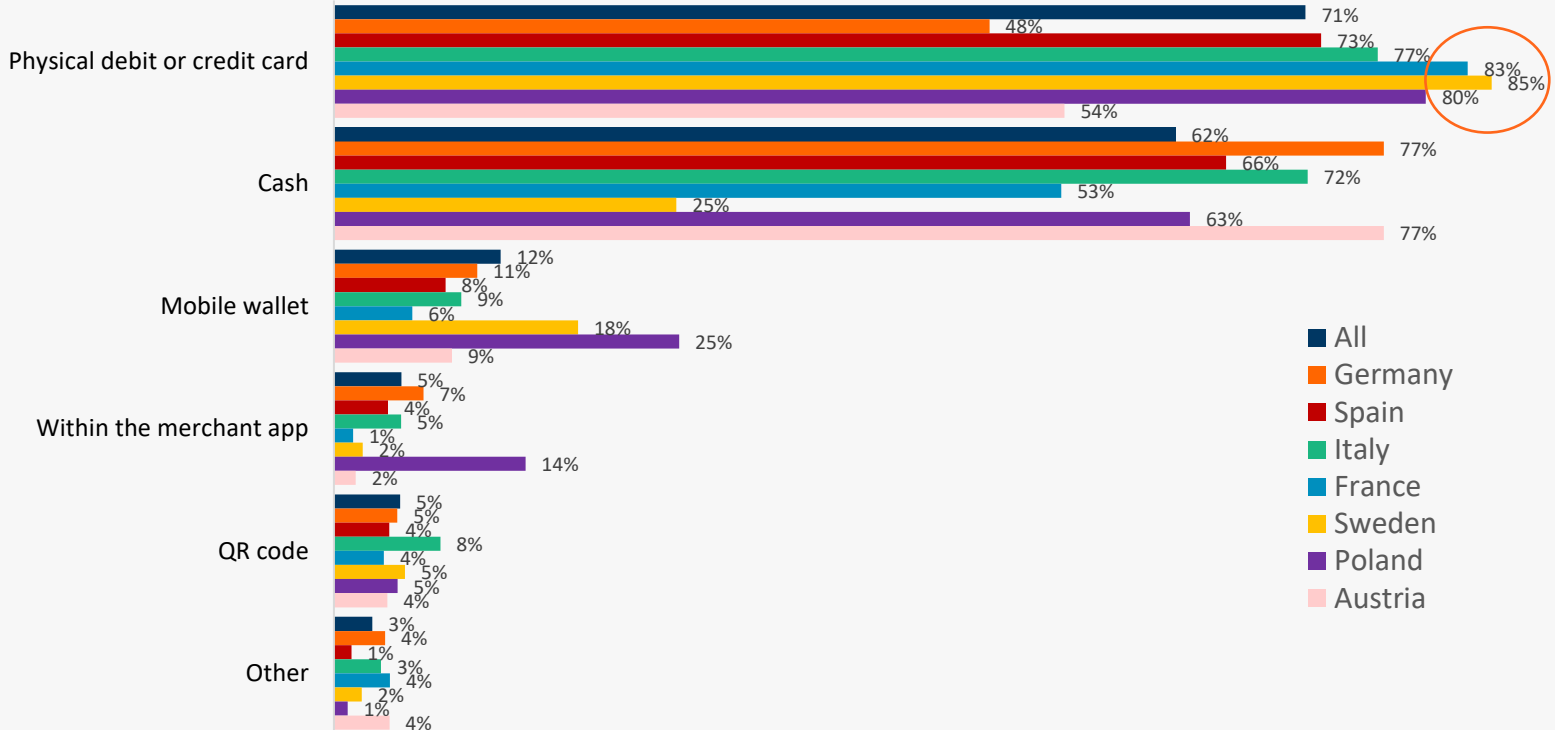
- **86% of respondents are legally able to drive** a car, with petrol/diesel cars being driven the most, by 87% of drivers.
- EV / Hybrid cars seem to be **more popular amongst the younger generations**: up to **17% of 18-24 year olds and of 25-34 year olds have done so**, compared to 8% in the 45-54 age range and 7% in the 55+ range.
- Those living in the **inner city (13%)** are **three times more likely** to drive electric/hybrid cars compared to those living in rural areas (5%).



Payment methods most used in physical stores



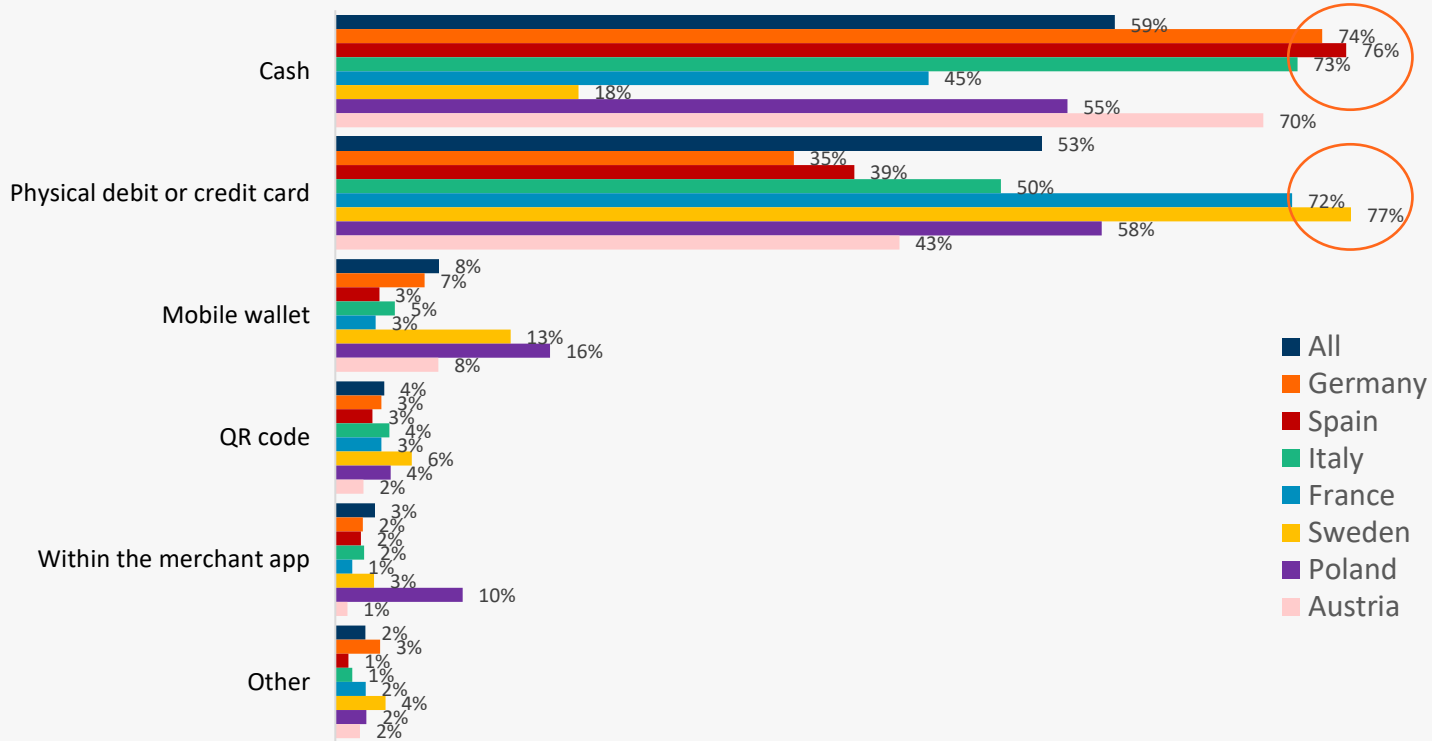
Which of the following methods of payment do you use most in a physical store? (Please select all that apply)



Payment methods most used at vending machines



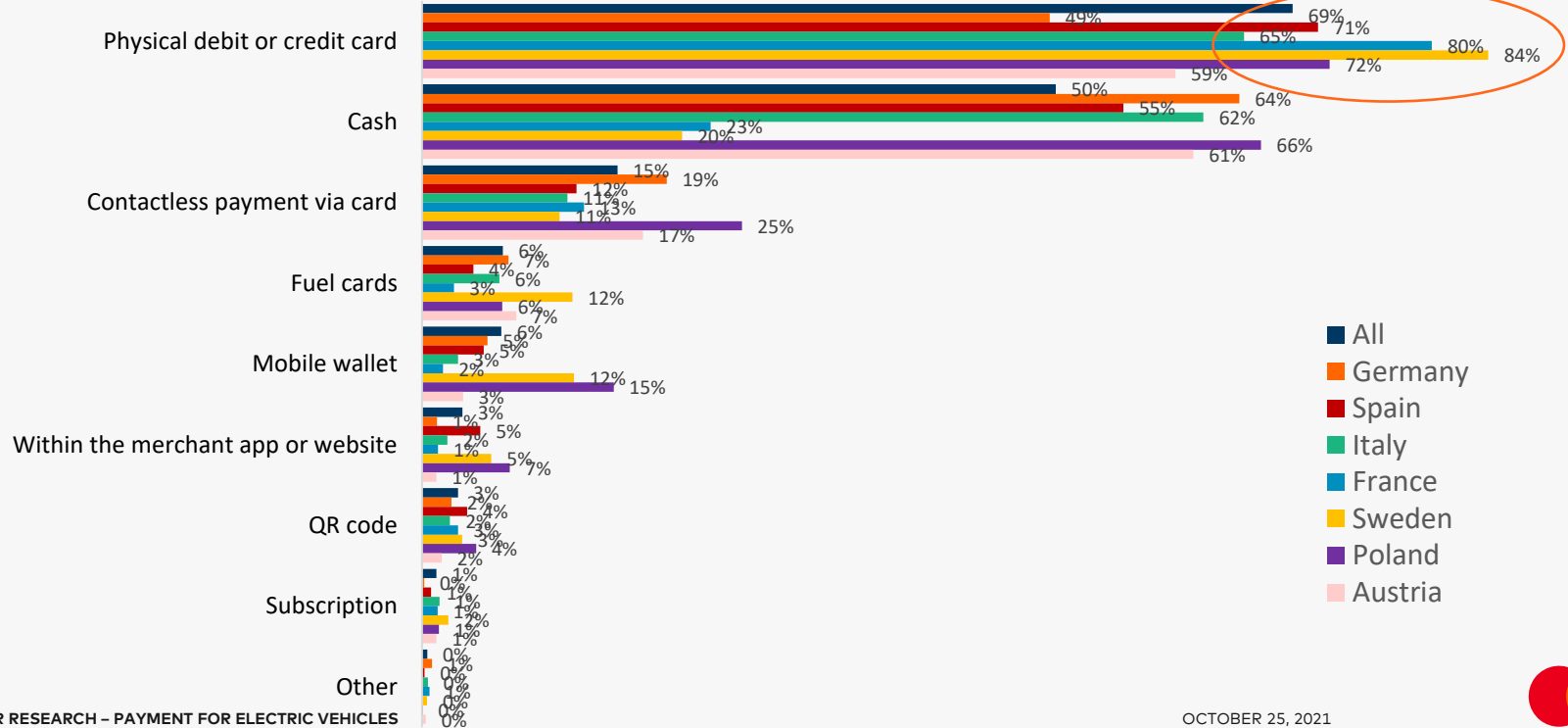
Which of the following methods of payment do you use most at a vending machine? (Please select all that apply)



Payment methods most used for re-fuelling / re-charging the car



Which of these methods of payment have you used when filling up/charging your car in the past 12 months? (Please select all that apply)



Key messages

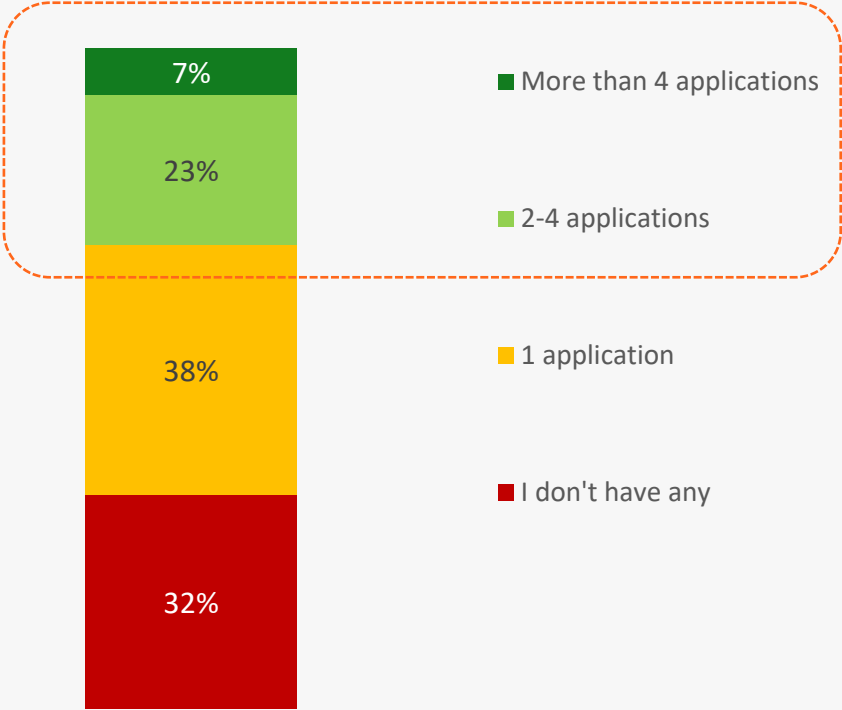
- **Consumers prefer choice** of payment methods
- Drivers in **Sweden** and **France** show highest rate of **payments by card**
- **50% of EU markets rely on cash** when refuelling /recharging their car



Payment methods most used for re-fuelling / re-charging the car



How many different smartphone applications do you have on your phone related to vehicle charging? (Please select one response)

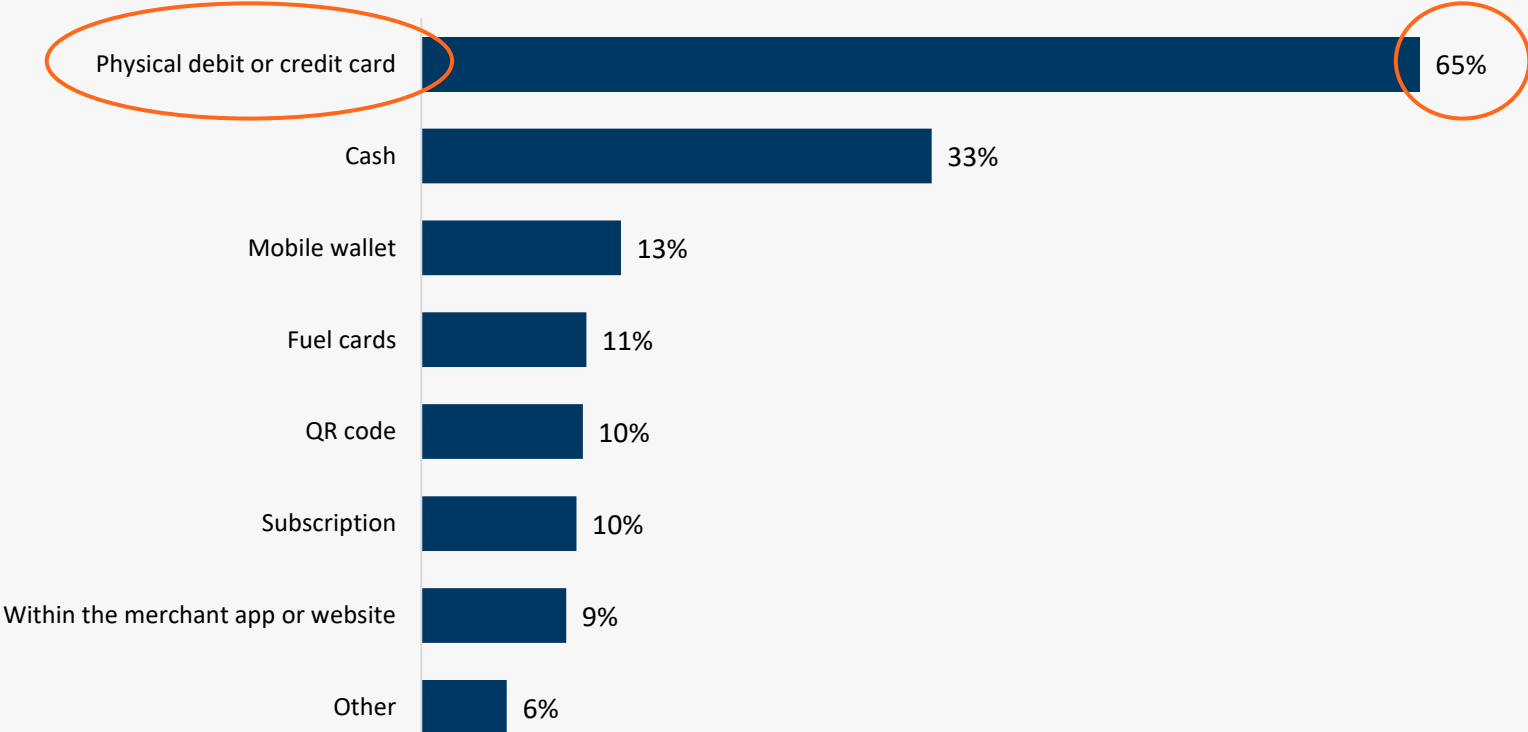


Looking ahead – payment for EV charging



We'd now like you to assuming you have an electric vehicle if you don't have one to drive...

Which of the following methods of payment would you prefer to use when charging an electric vehicle (if available)? (Please select all that apply)

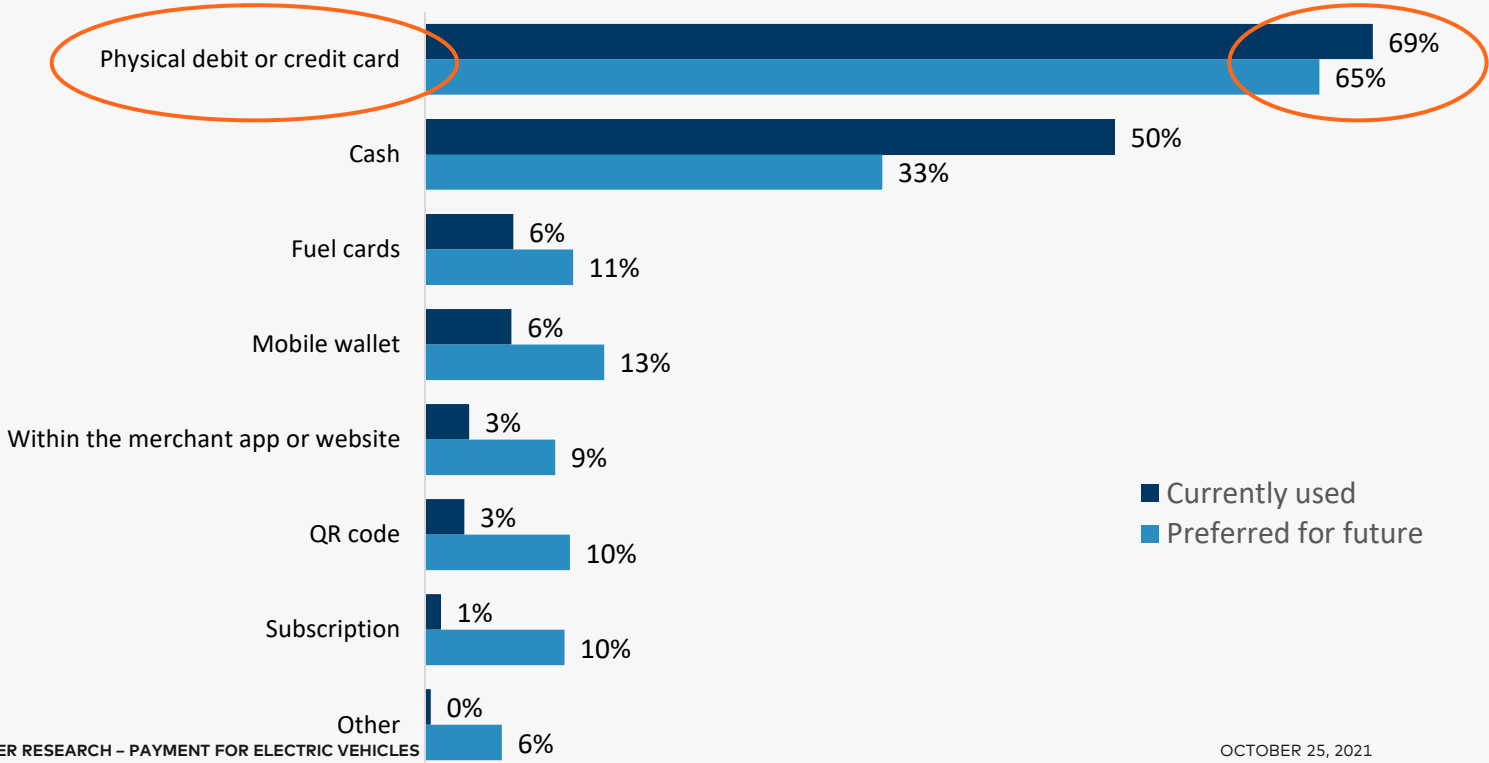


Looking ahead – payment for EV charging



Which of these methods of payment have you used when filling up/charging your car in the past 12 months? (Please select all that apply)

Which of the following methods of payment would you prefer to use when charging an electric vehicle (if available)? (Please select all that apply)



Looking ahead – payment for EV charging

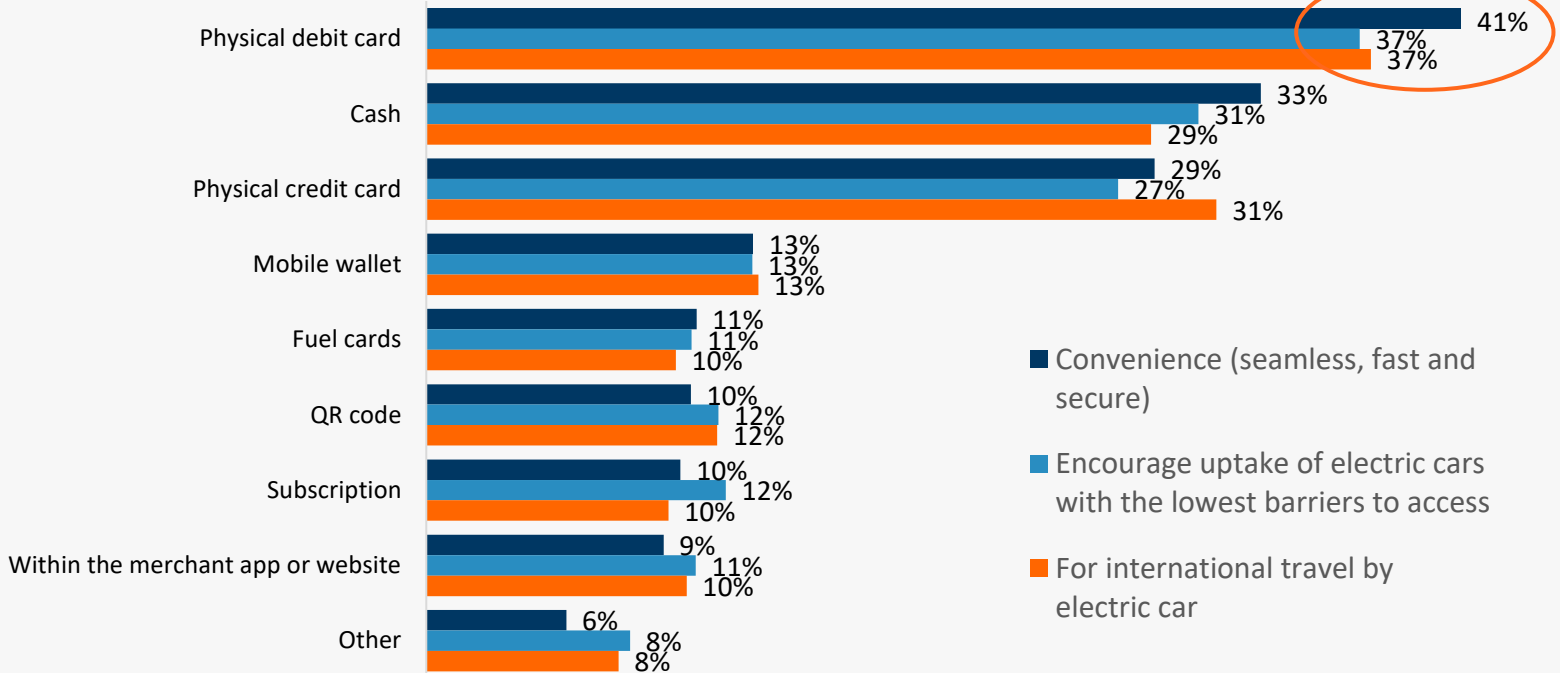


Which of these methods of payment for ad hoc charging an electric car would be the best for the following? (Please select all that apply)

Convenience (seamless, fast and secure)

Encourage uptake of electric cars with the lowest barriers to access

For international travel by electric car



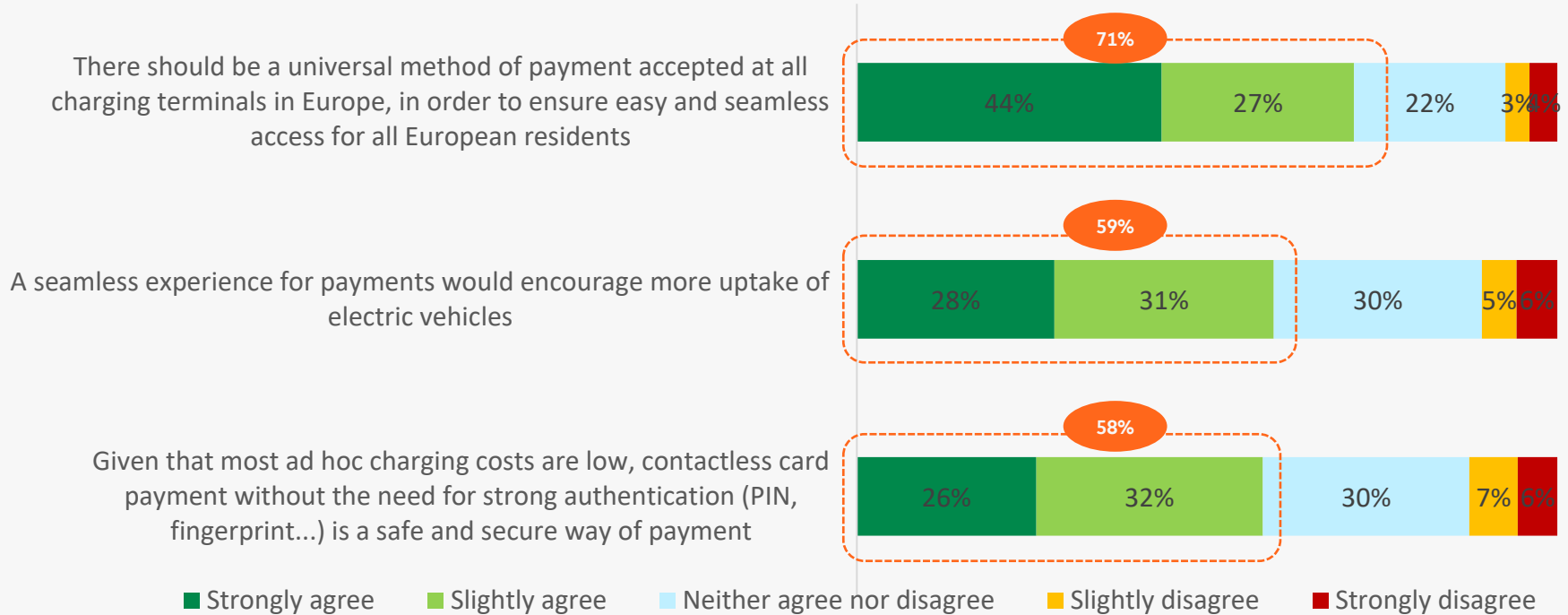
- Convenience (seamless, fast and secure)
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Looking ahead – payment for EV charging



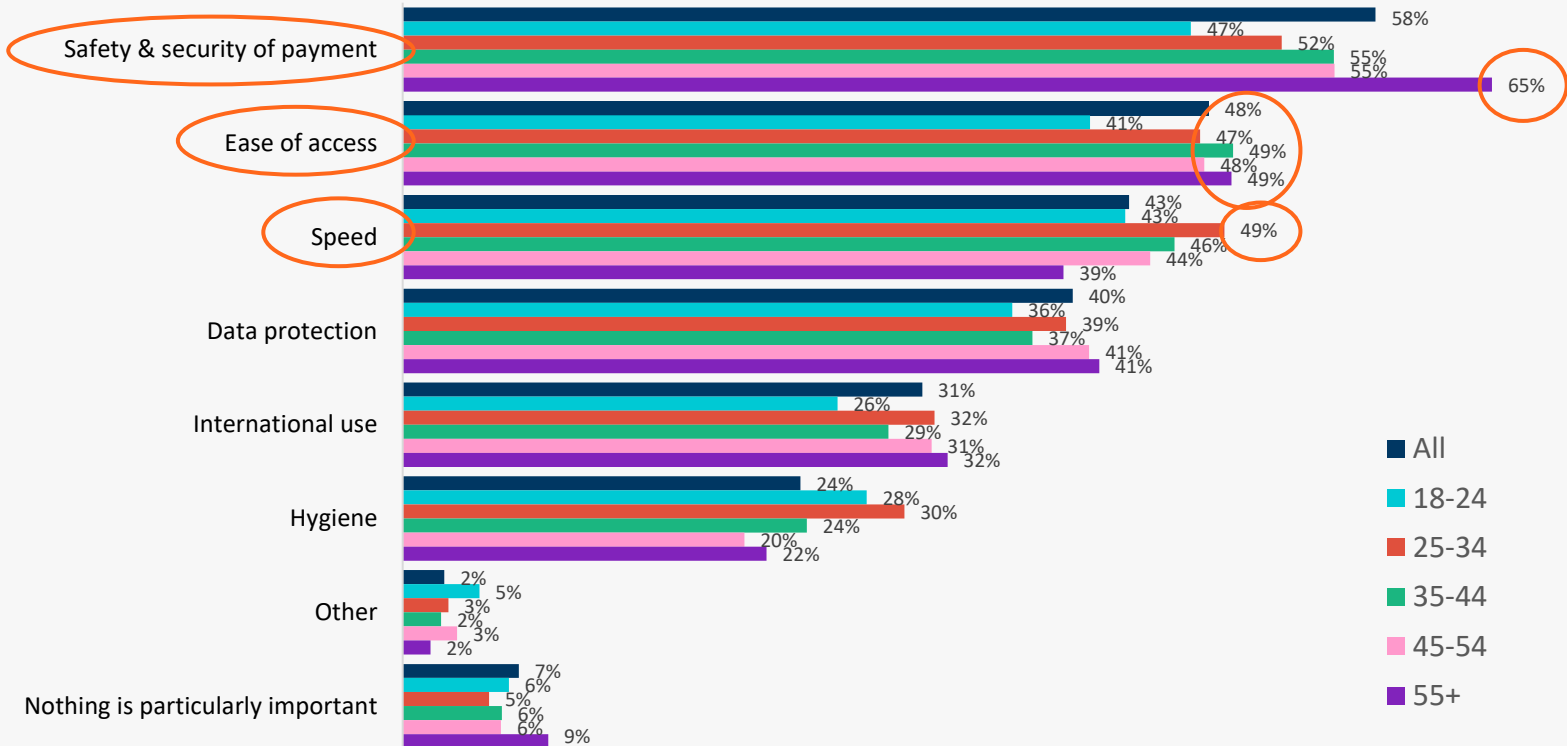
How strongly do you agree or disagree with the following statements with regards to ad hoc electric vehicle charging? (Please select one column response for each row)



Looking ahead – payment for EV charging



*Which of the following do you consider are particularly important aspects of the payment process for ad hoc electric vehicle charging?
(Please select all that apply)*



Key messages

- 
- **65% of consumers prefer card payments for recharging**, followed by cash (33%)
 - **Cards provide highest degree of convenience:** seamless, fast & secure
 - **Security** ranks high in relevance for **older generation** (>55 years) with 58% while **younger generation** (25-34 years) prioritizes **speed (49%) & hygiene (30%)**



 **Thank you for your attention** 

