



# How do consumers feel about their EV charging experience?

October 2023

# Methodology

This survey was conducted online over a one-week period from Oct. 4 to Oct. 11 of 2023. It was composed of 562 respondents from our policy newsletter subscriber list.

Of the 562 respondents, 95% have access to charging at their home residence. 82% of those respondents have access to Level Two charging at home, while 25% have access to Level One charging.

Respondents were asked the following questions:

- Does charging your EV at home cost more or less than expected?
- How satisfied are you with public charger availability and reliability?
- Do you use an EV for longer trips? If so, what make of EV do you primarily use for longer trips?
- Do you plan out your stops for charging on longer trips beforehand or make decisions while on the road?





# Main findings

## **Many consumers find charging at home to cost less than expected.**

39% of respondents answered that charging at homes costs less than expected, compared to only 4% who said it costs more than they expected.

## **23% of respondents do not use their EVs for longer road trips.**

Almost 1 in every 4 respondents answered that they keep their EVs at home for one-way trips over 100 miles, a finding that could come down to factors such as range anxiety and charging worries.

## **Consumers are not satisfied with public charging, especially those who do not own a Tesla.**

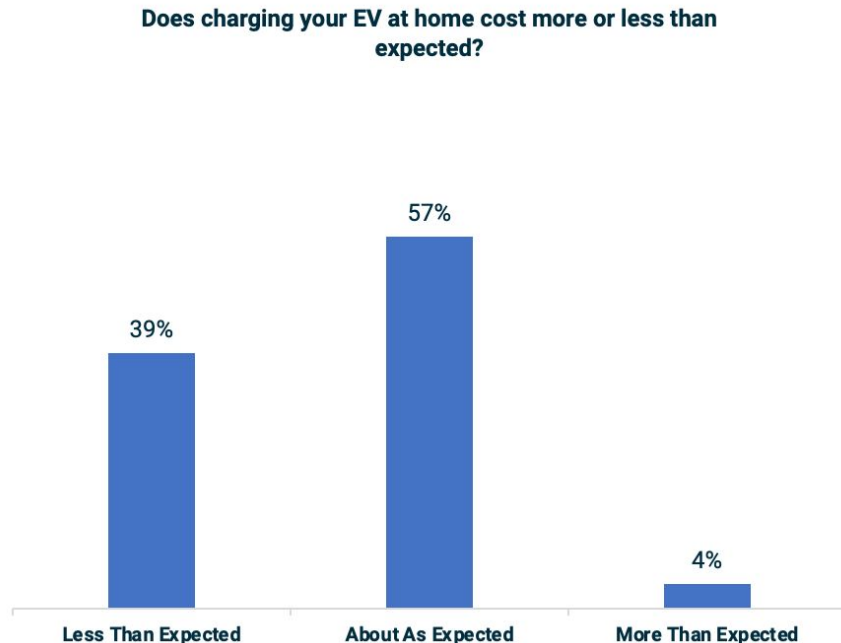
While half of respondents indicated that they are dissatisfied with public charging availability and reliability, dissatisfaction rises even more when you account for differences in car choice and charging networks.

# Almost 40% of respondents indicated that charging at home costs less than expected.

While 57% of respondents found the costs to be as expected, 39% of respondents said that charging their EV at home costs less than they expected.

By a 39% to 4% margin, respondents indicated that they were much more likely to find charging costs at home to be less than expected than more than expected.

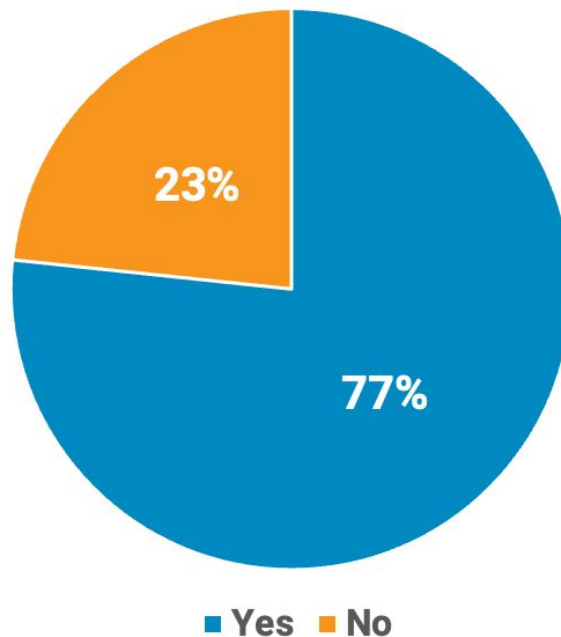
Whether it be because of time of use rates or consumers driving less than they expected, there is an opportunity to educate potential EV consumers about how much or how little they can expect to pay for home charging.



# 77% of respondents use an EV for longer road trips.

77% of respondents indicated that they use an EV for longer road trips (defined as one-way drives over 100 miles), compared to 23% who do not use an EV for those trips.

Do you use an EV for longer trips?



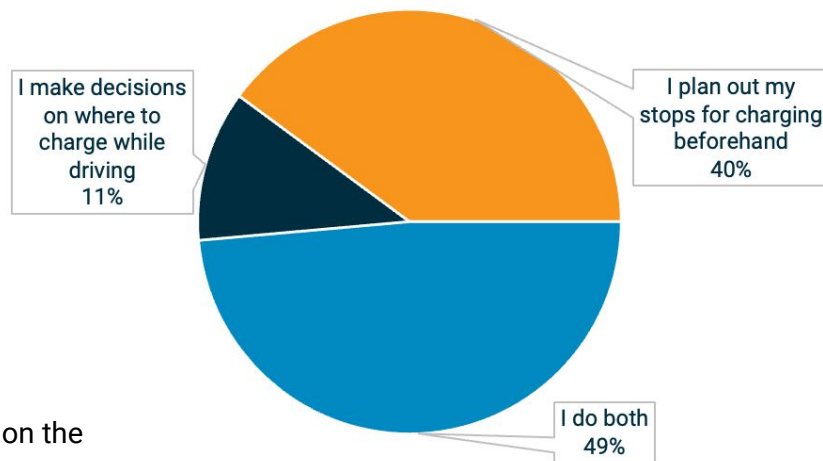
# Consumers like to plan out their charging stops on longer trips beforehand.

Respondents are almost 4x as likely to plan out their charging stops beforehand, rather than making decisions while on the road.

Almost half of respondents indicated that they do both, possibly planning out areas where they can take stops and then reacting to see what chargers are available or to factors such as weather or food/bathroom stops.

Only 11% of respondents make spontaneous decisions while on the road, indicating a desire from consumers to be safe rather than sorry when it comes to their long trips.

Do you plan out your stops for charging on longer trips beforehand or make decisions while on the road?



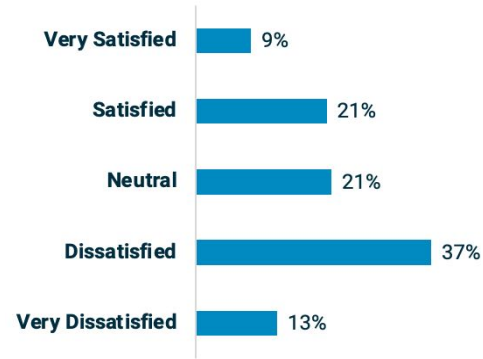
# Public charging has left consumers wanting more.

50% of respondents indicated that they were either “dissatisfied” or “very dissatisfied” with both public charger availability and reliability.

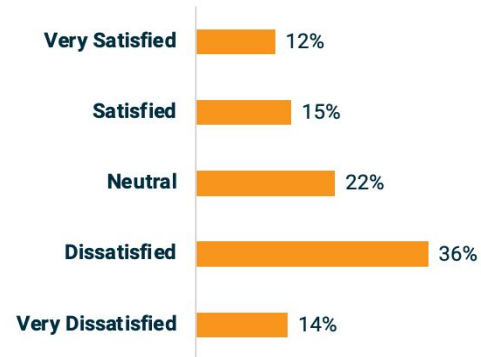
Only 27% of respondents answered that they were at least satisfied with public charger reliability, compared to 30% who said the same for public charger availability.

While the general consensus is negative towards public chargers, the perception of public charging drops even further when you account for differences in cars and charging networks.

How satisfied are you with public charger availability?



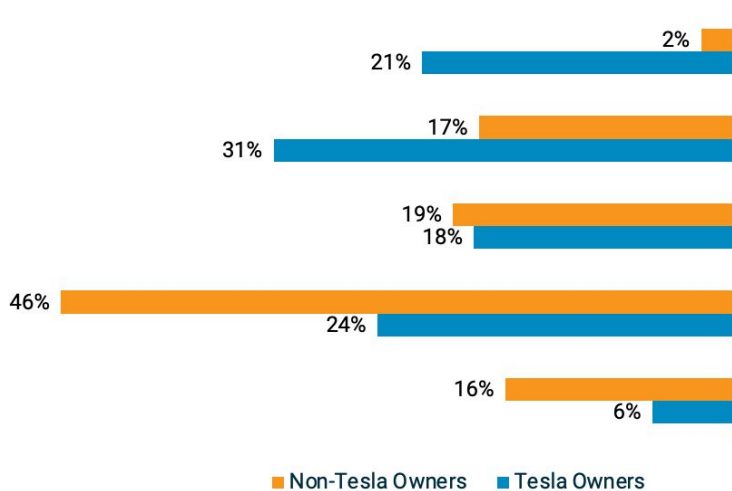
How satisfied are you with public charger reliability?



\*Due to rounded decimals, sum of percentages may not equal 100%

# Public charger satisfaction breaks upon Tesla lines, with over 60% of non-Tesla owners dissatisfied with both charger availability and reliability.

How satisfied are you with public charger availability?



How satisfied are you with public charger reliability?

