



**Plug In America**

# Public Charging Payment & Pricing

March 2025

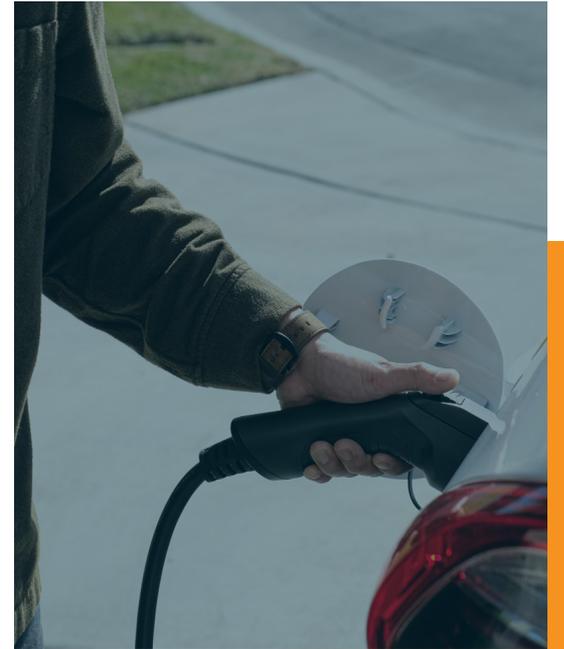
# Methodology

This survey was conducted online over a three-week period from September 25 to October 16 of 2024. It included 1,279 respondents, with 1,127 of those respondents saying they **primarily** drive an electric vehicle. To see the demographics of the survey respondents, please go to [Slide 15](#).

Respondents were asked about how they use public EV charging, how they typically pay for public charging, what their preferences are in a public charging experience, what issues they have faced and what improvements can be made to optimise their time spent at public charging stations. We did not ask respondents for information on vehicle type and which charging network they use most often.

About 72% of our survey respondents indicated they use public charging on an infrequent basis. 13% said they use public chargers frequently, while 8% said they use for almost all of their charging needs.

Furthermore, about 83% of our respondents said they use public EV chargers when traveling out of town. The next highest answers were when running errands (22%) and when at work (12%). Respondents were allowed to select more than one choice for this question.





# Main findings

## **Convenience is the most important aspect for public EV charging.**

Throughout the survey, respondents indicated that a quick and easy experience at a public charging station is what they desire most. Whether it be in-app, at the station, or elsewhere, consumers are more loyal to a convenient experience than they are to brands or discounts.

## **There's a lack of transparency in public charging that can impact respondents.**

Respondents reported difficulty finding out what payment methods are accepted at charging stations and the cost of a charging station before arriving. Almost three-quarters of respondents said they've experienced being unable to determine the cost before arriving.

## **Negative experiences can turn respondents away from a charger.**

When consumers feel like they've had an inconvenient experience at a charging station, that is likely to impact their view of that charger later on. 43% of respondents said it made them avoid visiting that charger/brand again.

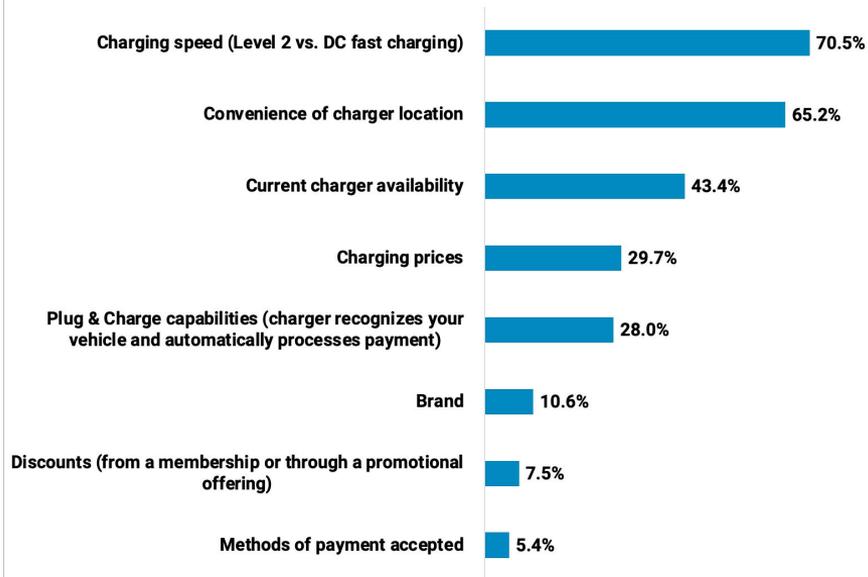
# What do respondents look for when searching for public chargers? Convenience.

Charging speed (71%), convenience of charger location (65%), and charger availability (43%) were the most popular types of information that respondents look for when searching for a public EV charger.

Respondents want to be able to get their car to a charger and back on the road as quickly as they can. They are more loyal to convenience than they are to brands or promotions.

Almost half of respondents said they have an app or account with 3 or more providers. This allows them to compare choices based on their current situation. Providers shouldn't expect loyalty to their brand.

In terms of importance, what information do you look for when searching for a public EV charger that meets your needs?

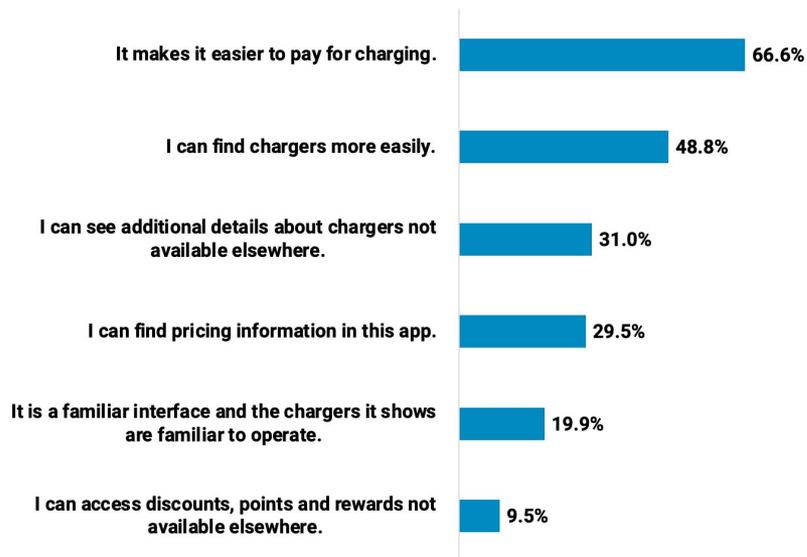


# Respondents like that EV charging apps make it easier to find chargers and pay for charging.

When asked what they find most useful about using an EV charging apps, respondents indicated that easier payments (67%) and an easier way to find chargers (49%) were the most useful advantages.

Notably, being able to find pricing information (30%) and being able to access discounts (10%) were much less likely to be selected. **The ease of use that an app provides is more useful than pricing information or available discounts.**

## What are the things you find most useful about using an EV charging app?

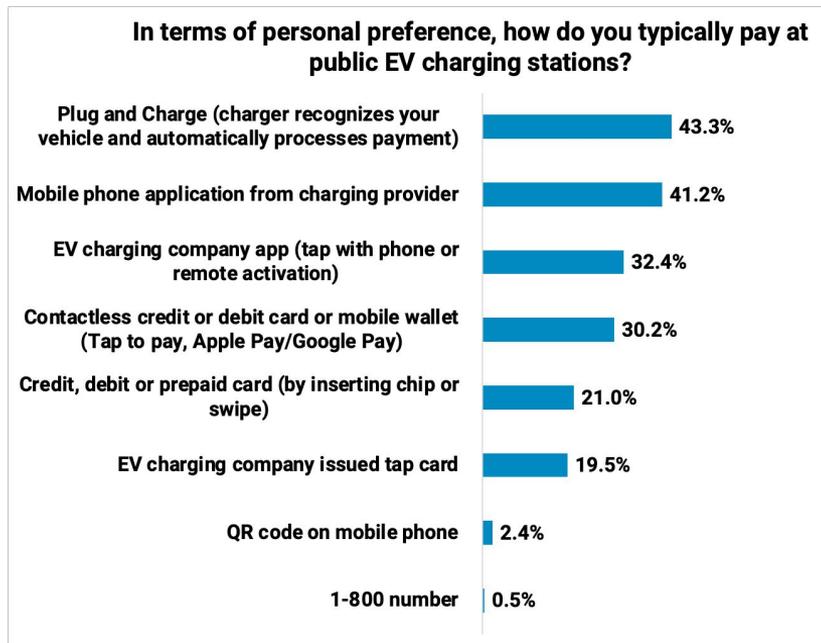


# Payment methods which require the fewest steps are most preferred by respondents.

Plug and Charge (43%) was most likely to be cited as the personal preference for respondents. Plug and Charge is charging technology where the charger recognizes your vehicle and automatically processes the payment.

Mobile phone apps (41%), charging company apps (32%), and contactless credit or debit cards (32%) were the next highest, marking the importance of convenience in paying for charging.

When asked why they chose these methods, 72% of respondents said they are the easiest methods for them to use.

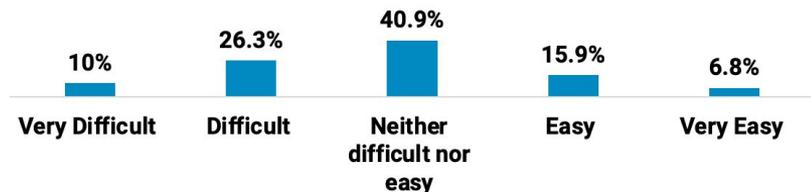


## Respondents were more likely to indicate it's difficult to find info about payment methods at public charging stations before arriving.

About 36% of respondents said it is difficult or very difficult to find information about payment methods at public charging EV stations before arriving, while about 23% said it is easy or very easy.

While 41% of respondents said it is neither difficult nor easy, this showcases a lot of room for improvement. This represents a clear fix that can be made to public charging to make the experience more convenient for consumers.

**In your opinion, how easy is it to find information about payment methods at public charging EV stations before you arrive? (such as whether it accepts credit/debit cards, your preferred account, or other payment options)**



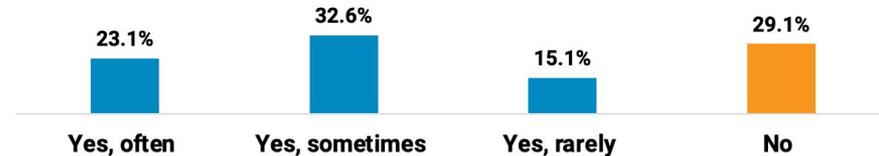
# Over 70% of respondents have felt pressure to download an app or pre-load funds to operate a public EV charger.

Only 29% of respondents said they have never felt pressure to download an app, create a membership, or pre-load funds to use a charger, even if not necessary to operate the charger.

23% said this happens to them often, while about 33% said that this happens sometimes. Another 15% said that they happens on a rare basis.

As respondents indicate how much convenience matters to them, extra steps like these present EV drivers with a barrier to a frictionless charging experience.

**Have you ever felt pressure to download an app, create a membership, or pre-load funds to use a charger, even when it was not necessary to operate the charger?**

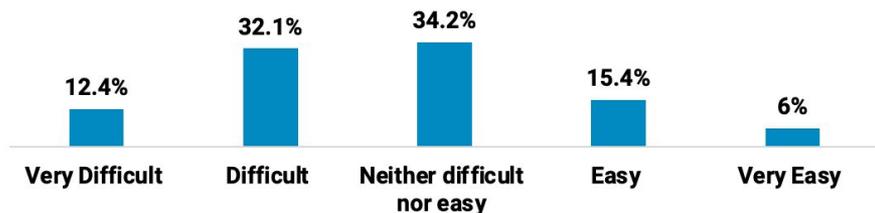


# Finding information about the cost of public charging before arriving tends to be difficult for respondents.

About 45% of respondents indicated it is difficult or very difficult to find information about the cost of public charging before arriving, compared to 21% who said it is easy or very easy.

Given the importance of costs and convenience, this shows room for improvement. EV drivers should be able to understand what they will pay at each charging station to help them make their decision on where to charge.

**In your opinion, how easy is it to find information about the cost of charging at public EV charging stations before you arrive?**

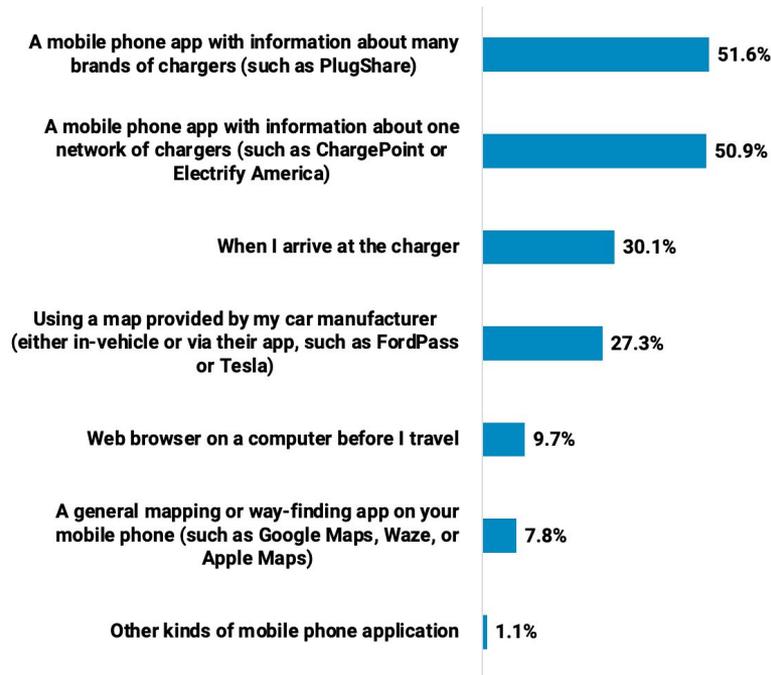


# About half of respondents use mobile apps to find pricing information, while 30 percent find out when they arrive.

Whether it be mobile phone apps with info about many brands of chargers (52%) or mobile phone apps about one network of chargers (51%), respondents turn to their phone when they need pricing information.

30% of respondents say they find out when they arrive at the charger, while 27% say they use a map provided by their manufacturer either in-vehicle or in their app.

## Where do you typically look to find information about pricing at a public EV charging station?



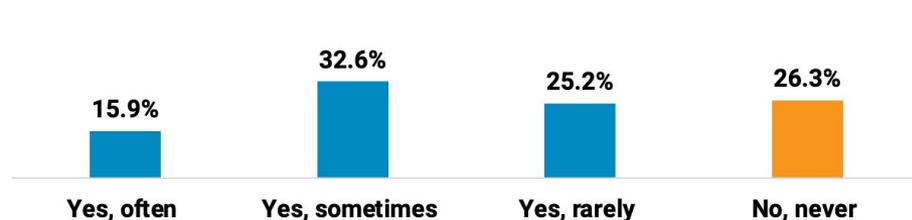
# Almost three-quarters of respondents haven't been able to determine the cost of a public charging session in advance.

Only 26% of respondents indicated that they have been never been unable to determine the cost of a public charging session in advance.

33% of respondents said this happens sometimes, while 16% said this happens often. The remaining 25% said that this happens on a rare occasion.

When unable to determine the cost, about 74% said they still visited the charger. 16% visited another charger, while the remaining respondents changed plans entirely.

**Have you ever been unable to determine what the cost of a charging session at a public EV charger will be in advance?**



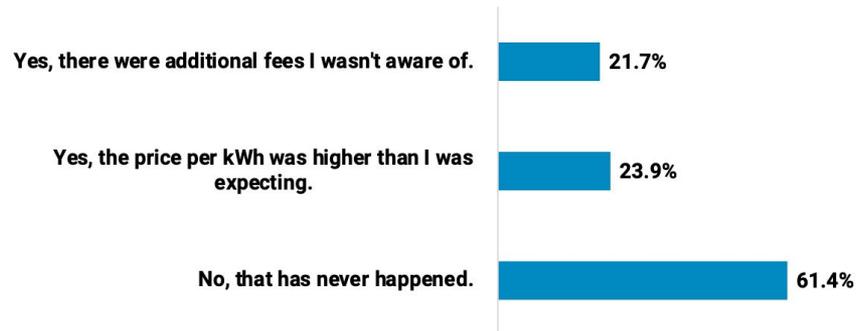
# About 46% of respondents said that they have paid additional fees they weren't expecting when using public charging.

61% of respondents said that they have never had to pay additional fees or paid a significantly higher price for EV charging than expected.

22% said they have had unexpected additional fees, while 24% have said the price was higher than expected. Respondents could select both if applicable.

Less than 2% of respondents who faced an unexpected cost found out before arriving at the station. 40% found out after completing the charge and 30% found out after paying.

**Have you ever had to pay additional fees (such as idling fees or demand pricing) you weren't aware of, or paid a significantly higher price for EV charging than you were expecting?**

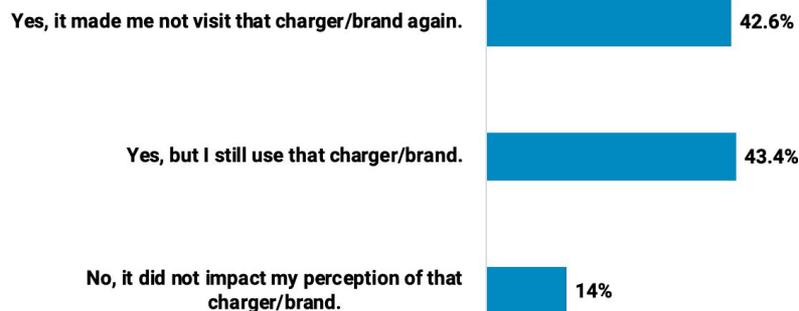


# 86% of respondents said their perception of a brand was impacted by a negative payment experience.

In total, 43% of respondents who said they have had a negative payment experience said that they have not visited that charger/brand since.

Only 14% said that these payment problems did not impact their perception of the brand at all – this shows great incentive for charging brands to be transparent and easy to use.

**If you have ever had trouble determining the price, had to pay more than expected, or were not able to pay with your preferred payment method at a public EV charger, did this experience impact your perception of that charger brand?**

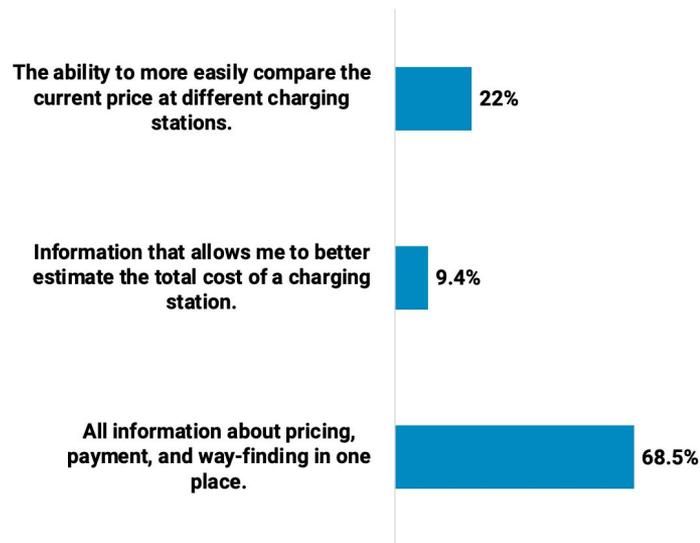


# Respondents indicated they want a one-stop place to see information about pricing, payment, and way-finding.

About 69% of respondents said they'd most like to see all information about pricing, payment and wayfinding in one place in the future.

22% said they'd most like to be able to compare prices at different charging stations, while 9% said they'd like to be able to easily estimate the total cost of a charging station.

## What would you like to see most when looking for information about price or payment methods at EV chargers in the future?



# Demographics

Race/Ethnicity	Percentage
Asian/Asian American or Pacific Islander	5.5%
Black or African American	3.5%
Hispanic or Latino	4.9%
Native American	1.1%
White	80.8%
Other	1.8%

*Some respondents declined to specify.*

Gender Identity	Percentage
Male	79.3%
Female	17.3%
Nonbinary	0.4%

*Some respondents either declined to specify or answered that they would prefer to self-describe.*

Household Size	Percentage
One	15.6%
Two	55.8%
Three	12.7%
Four	12.2%
Five	3.3%
Six	0.3%
Seven or more	0.1%

Annual Household Income	Percentage
\$40,000 or less	3.8%
\$40,001 to \$70,000	7.7%
\$70,001 to \$100,000	11.7%
\$100,001 to \$125,000	14.1%
\$125,001 or more	41.5%

*Some respondents declined to specify.*

# Demographics

Primary Vehicle	Percentage
Gasoline vehicle	10%
Electric vehicle	60.4%
Both a gasoline vehicle and an electric vehicle	27.8%

*Respondents who do not drive an electric vehicle did not fill out questions about public charging.*

How often do you visit public EV chargers that require payment?	Percentage
Never	7.5%
Infrequently	71.6%
Frequently	13.2%
For almost all or all of my charging needs	7.6%

*Respondents who have never used a public charger that requires payment did not fill out questions about public charging.*

Where do you usually charge at public EV chargers?	Percentage
When I go to work	11.5%
When I am traveling out of town	82.5%
When I run errands	21.8%
When I am near my home and have available time	10.7%
Other	6.8%

*Respondents were allowed to select more than one option, so percentages add up to over 100%.*



[PlugInAmerica.org/survey/insights](https://PlugInAmerica.org/survey/insights)

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