



Shell
Recharge 

Shell Recharge Driver Survey 2025

Global Report

Shell Global Insights E-mobility
2025



Shell

INSIGHTS



Contents of the Report

The survey took participants 10-15 minutes to complete and covered the topic areas outlined alongside (we also collected demographic data).

The report has been structured around these topics for ease of navigation.

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VEHICLES	01 Vehicle Ownership How many and what type of vehicles are driven? How were these vehicles acquired?
	02 Vehicle Usage How are the vehicles being used (personal vs. commercial) and how much are they being driven?
	03 EV Purchase Intentions What are they considering for their next vehicle? What is the impact of legislation and low carbon fuels on intentions?
	04 Attitudes to EVs What are the benefits of an EV? What are the barriers to purchase?
CHARGING / NFR	05 Charging Landscape Where are drivers charging? How do they feel about the charging infrastructure?
	06 Managing Long(er) Journeys How often are longer journeys made and how are they managed? How can we increase dwell time?
	07 Non-Fuel Retail What are drivers purchasing and has this increased since owning an EV? What is the role of coffee as part of the NFR offer?

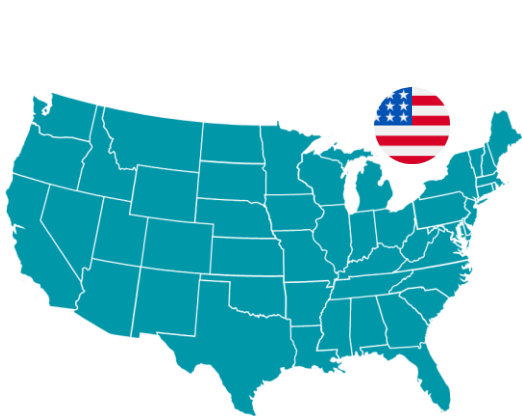
00 Context

Sample coverage
Participant profiles
Overview of key themes



We surveyed a large and diverse sample of the EV universe, with a total of 15,033 interviews completed using the SRS database and panel sample

The survey was hosted online, with the bulk of the European sample being drawn from the Shell Recharge (SRS) database. Online access panels were used to cover the USA and China, Non-EV drivers and also provide top-up sample for the European EV driver sample. The data was collected between March 7th and 31st 2025



	EV Drivers 	Non-EV Drivers 
	N=1,000	N=500
SRS Database	-	-
Online Panel	1,000	500



	EV Drivers 	Non-EV Drivers 
	N=8,803	N=1,630
SRS Database	8,203	130
Online Panel	600	1,500



	EV Drivers 	Non-EV Drivers 
	N=1,000	N=500
SRS Database	-	-
Online Panel	1,000	500

The European sample comprises our key energy transition markets of Germany, the Netherlands and the UK

Use of the SRS Database

Invitations to the SRS sample were sent by Shell to customers on the database who were opted in for surveys. Customers were incentivised with a prize draw (~€100 per market).



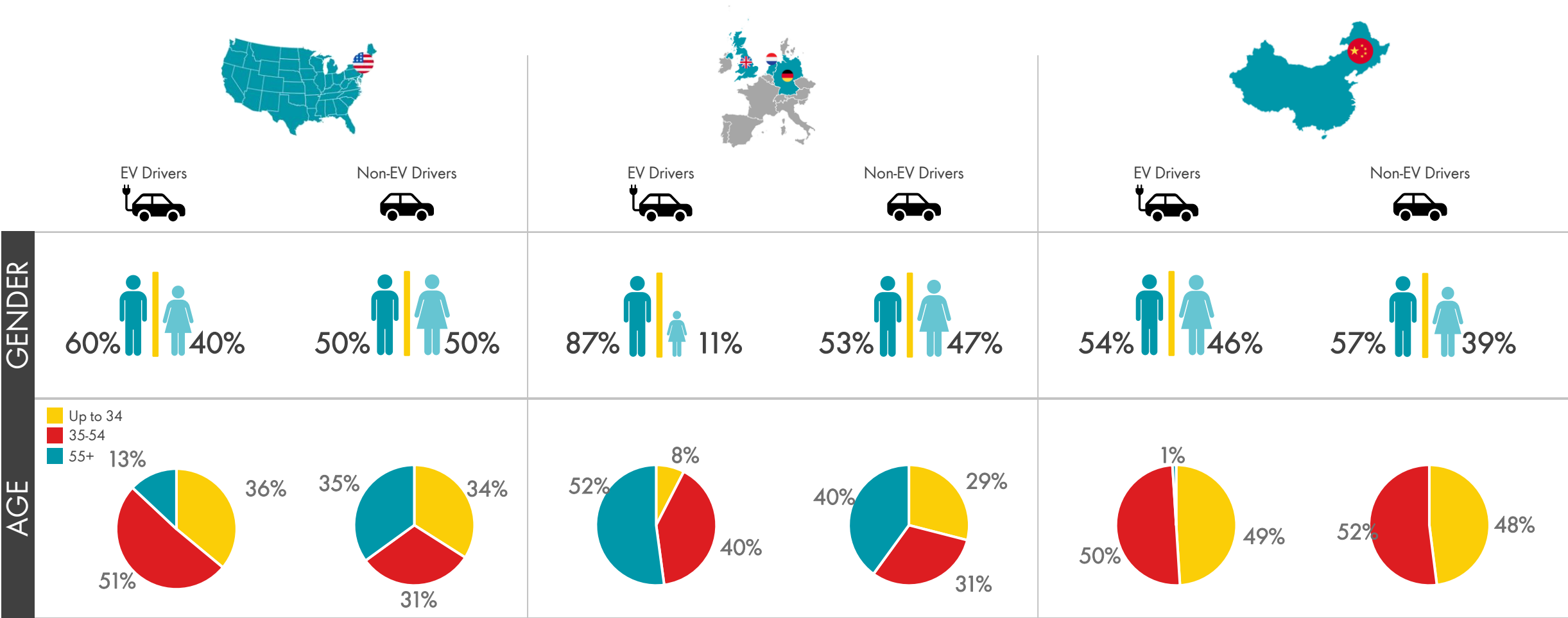
		EV Drivers		Non-EV Drivers	
					
		N=8,803		N=1,630	
		SRS Database	Online Panel	SRS Database	Online Panel
Europe Total		8203	600	130	1,500
	Germany	3855	200	71	500
	Netherlands	1997	200	12	500
	UK	2351	200	47	500

Weighting European Data.

For the purposes of presenting ‘European’ data and to maintain consistency with the 2024 sample, our European figures are calculated as the average of the three markets that were included in both 2025 and 2024. Data for Denmark and Greece has been provided separately.

Age and Gender Profiles

For all panel samples (USA, China, All Non-EV Drivers and European EV Driver top-ups) quotas were set on age and gender to reflect the profiles seen on our internal Global Brand Tracker. The profile of the (European) database sample fell out naturally, but it is notable that a high proportion are male and/or aged 55+, the proportions being significantly higher than the category as a whole. This skew to males and older ages was the same as we saw in 2024 so any year-on-year changes in Europe are not due to a change in profile.



Occupation Data

It is no surprise to see a skew among EV Drivers (relative to ICE drivers) towards higher managerial occupations as the Chief Income Earner in USA and Europe given the relatively high price of EVs relative to ICE vehicles. But in China, we are seeing more of a 'trickledown effect' to lower SEC occupations (where an EV is much more affordable). The older age profile of the Shell database in Europe also drives a high proportion of retired EV drivers within our sample, this again being consistent with what we saw in 2023 and 2024.



Employment Status (of Driver)	EV Drivers	Non-EV Drivers	EV Drivers	Non-EV Drivers	EV Drivers	Non-EV Drivers
						
Employed	82%	60%	66%	63%	82%	89%
Self Employed	7%	6%	10%	7%	16%	9%
Retired	6%	21%	21%	19%	1%	0%
Other Non-Working	5%	12%	1%	9%	1%	2%
Status of Chief Income Earner						
Higher managerial or professional	50%	22%	35%	18%	23%	22%
Intermediate managerial or professional	20%	15%	25%	23%	34%	31%
Supervisory/junior managerial or professional	10%	11%	7%	13%	26%	25%
Manual worker	10%	19%	9%	20%	15%	20%
Retired	5%	21%	21%	19%	1%	0%
Other	5%	12%	3%	7%	1%	2%

Overall Key Themes



Reliance on fuel continues to diminish

EV drivers are moving further away from ICE/fuel and trusting their EV. Additionally, the 'direction of travel' is to BEV rather than PHEV, further cementing trust in the EV category.

There are signs of a growing second-hand market in Europe which will help make further inroads to current ICE drivers.



Remaining ICE drivers will be increasingly resistant

EV drivers not only enjoy the driving experience but also see an improving charging network and experience less range anxiety.

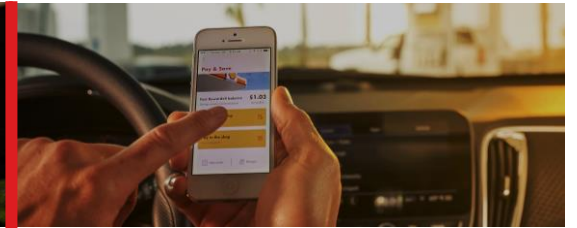
The remaining cohort of ICE drivers will be harder to 'convert' – they don't see the improvements in infrastructure that EV drivers experience. Reassurance as to the EV experience will be key.



We need to get charging right before offering add-ons

Public charging needs are focused on the basics of speed, availability, and reliability (along with price); we have to get these right.

There is a role for facilities, food/drink and retail once we are comfortable that we have a great charging experience. There are signs that drivers want dwell time.



There is a significant NFR opportunity

Quality coffee provision would help with the broader experience whilst charging. But there are also indications that seating and Wi-Fi are being used in the US and China, and they seem to be making a difference.

The European experience is not as rewarding – bringing the US/China experience to Europe could improve experience and satisfaction.

01 Vehicle Ownership

How many and what type of vehicles are driven?
How were these vehicles acquired?



KEY INSIGHTS

Vehicle Ownership

The category continues to grow, and we are seeing increasing confidence in EVs as the only/main vehicle. The growth is being primarily driven by fully electric vehicle acquisition which is leading to lower use of both hybrid and ICE vehicles.



MORE CONFIDENCE IN EVs, LESS RELIANCE ON ICE

Compared to 2024, more EV drivers have their EV as their only vehicle, and we continue to see a decline in the number of EV drivers also having an ICE vehicle.

The era of having an ICE vehicle or even a hybrid as a 'safety net' is diminishing year on year.



CONTINUED RAPID GROWTH IN ALL REGIONS

The majority of EVs are less than two years old, with a significant proportion bought in the last year, continuing the trend of a rapidly growing category relative to ICE vehicles.

In Europe, the proportion of EVs acquired 'as new' has decreased. This suggests a growing second-hand market which can only help bring more consumers into the category.



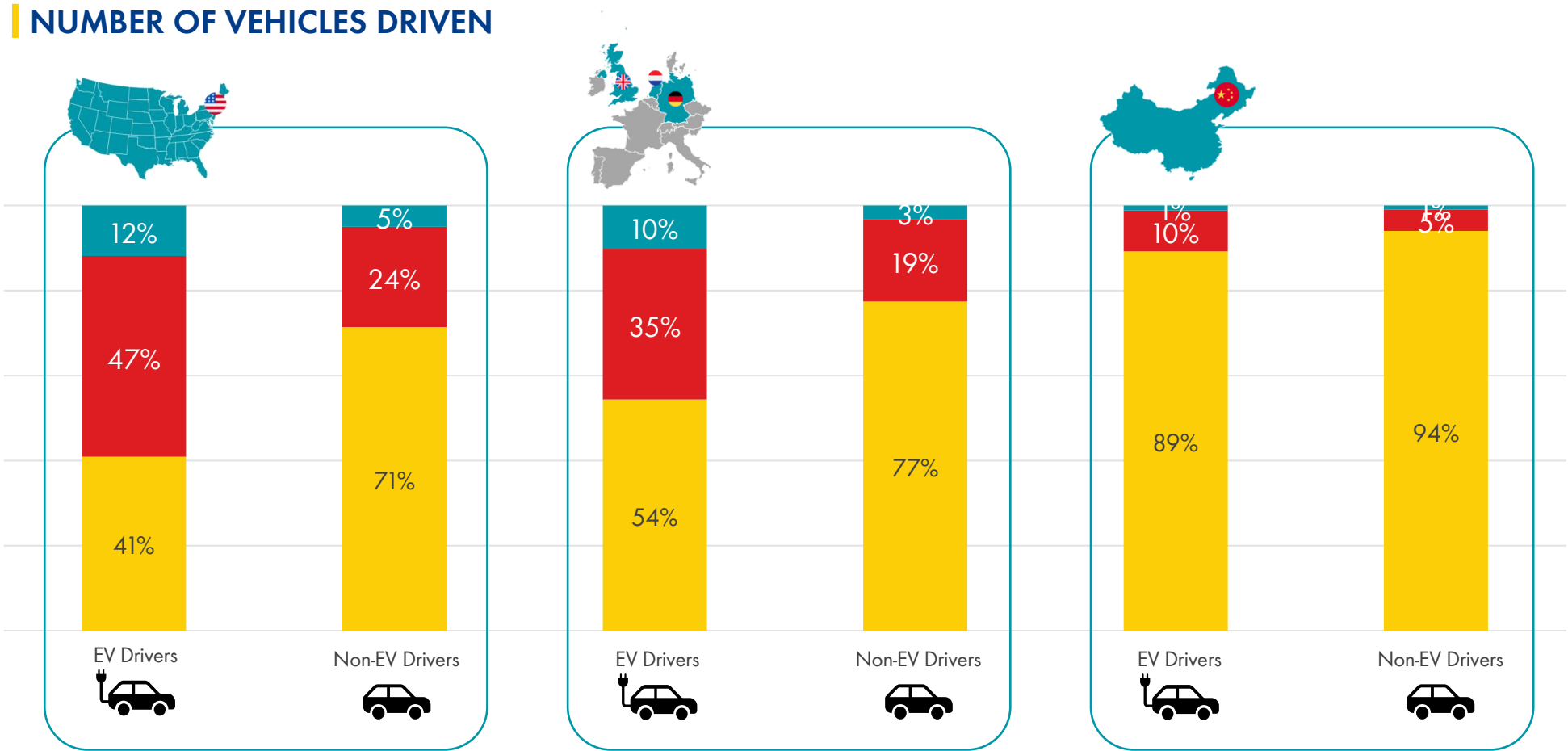
FULLY ELECTRIC IS BEING EMBRACED

Hybrid ownership has fallen and more EV drivers than 2024 cite a BEV as their main vehicle (with the number of BEVs overall also growing).

EV drivers continue to reduce their reliance/need for fuel.

EV drivers are more likely to own multiple vehicles, but this is reducing year on year suggesting greater confidence in an EV as their main or only vehicle

NUMBER OF VEHICLES DRIVEN



**2025
2024**

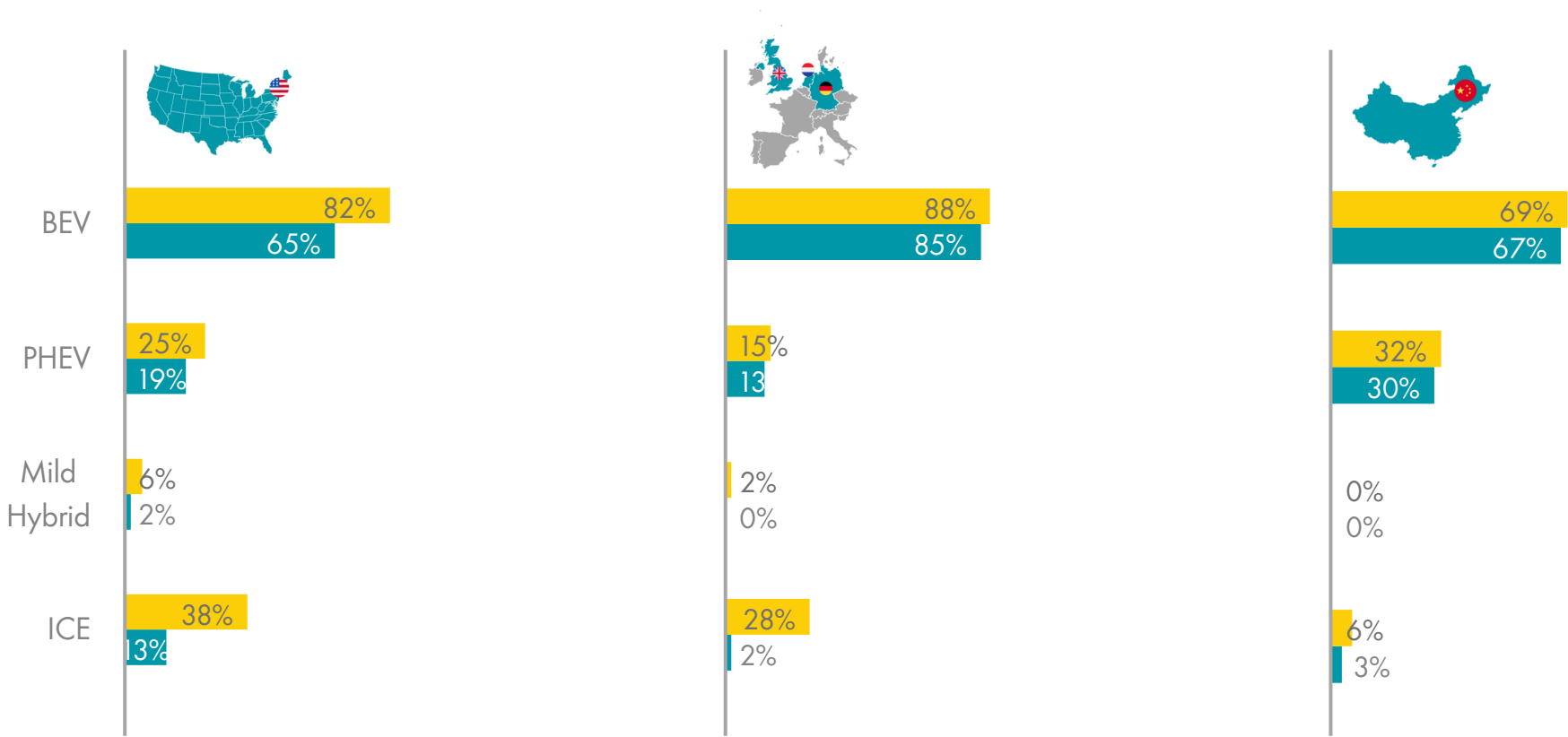
The proportion of EV drivers with just one vehicle is on the increase vs 2024:
USA – up from 34%
Europe – up from 49%
China – up from 72%

This suggests increasing confidence in just having an EV and no ICE vehicle

- 3 or more vehicles
- 2 vehicles
- 1 vehicle

Most EV drivers now own a BEV and use it as their main vehicle – the ICE/hybrid ‘safety net’ is also reducing year on year

ALL VEHICLE TYPES OWNED vs MAIN VEHICLE TYPE (AMONG EV DRIVERS)



2025
2024

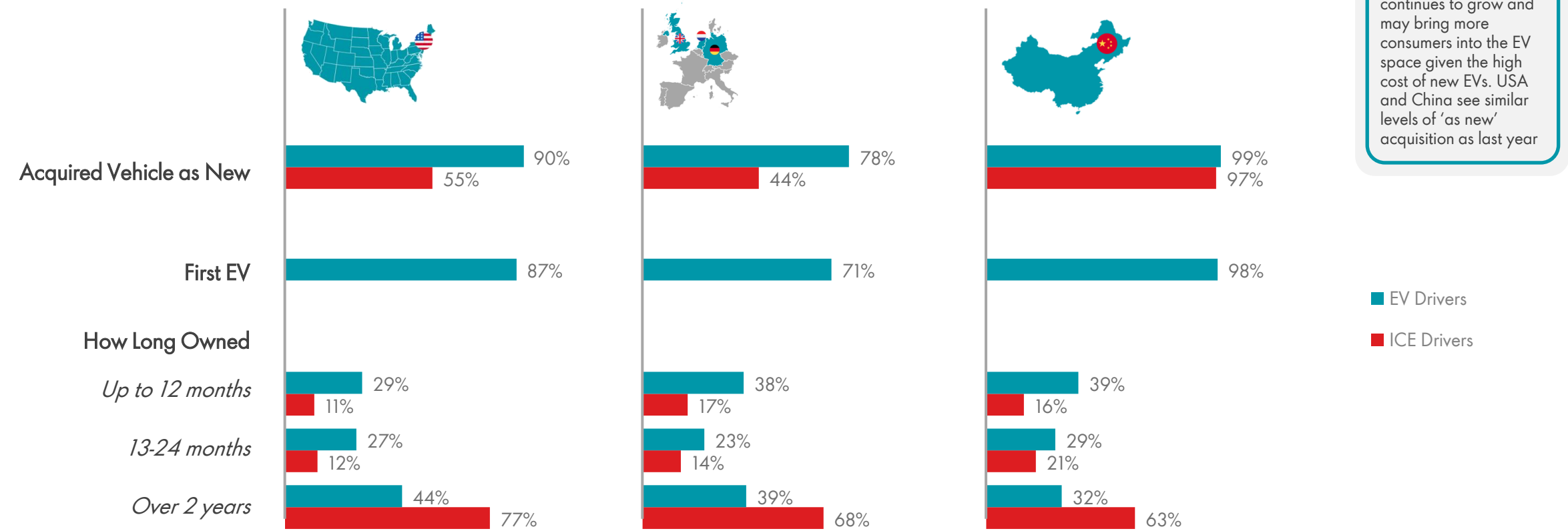
The proportion of European EV drivers with a BEV as their main vehicle increases to 85% (vs 83% in 2024), and both USA and China see BEV as main vehicle catching up with Europe – USA 65% (vs 45% 2024), and China 67% (vs 50% 2024)

■ All Vehicle Types Owned

■ Main Vehicle Type

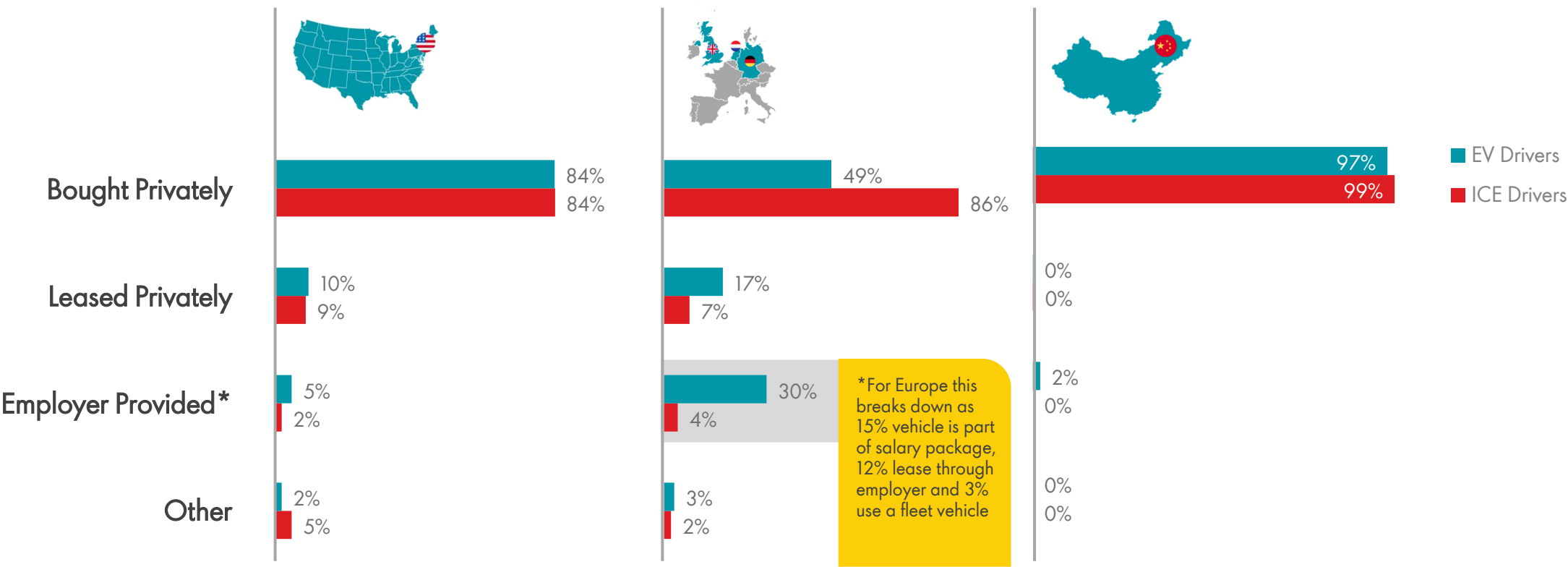
The EV category continues to grow in all regions; most EVs were acquired in the last 2 years (and more were acquired in the last 12 months than 13-24 months ago)

CONDITION OF VEHICLE AND LENGTH OF OWNERSHIP



The EV category in Europe continues to be strong in leasing and employer provision (relative to ICE), as new-EV ownership continues to be costly

HOW VEHICLE WAS ACQUIRED



02 Vehicle Usage

How are the vehicles being used (personal vs. commercial)
How much are they being driven?



KEY INSIGHTS

Vehicle Usage

EVs have established themselves strongly in the fleet category and are being used to a greater extent than ICE vehicles; they are much more than just a secondary vehicle being used as a local runaround.



A POPULAR CHOICE FOR FLEET/COMMERCIAL USE

In all regions, EVs are more likely than ICE vehicles to be used for commercial purposes and the proportion of EVs being used in this way is significant in all regions, making it an attractive target for products and services.



FULFILLING A WIDE VARIETY OF FLEET NEEDS AND TASKS

EVs are being used for a wide variety of purposes, covering professional use and operational/delivery tasks.

In 2024, EV ownership was highest amongst managerial occupations. This year in China we are seeing a 'trickledown' effect to more junior and 'blue collar' ownership. This is reflected in an increase in EV use for distribution and delivery roles.



AND BEING USED EXTENSIVELY BY MANY

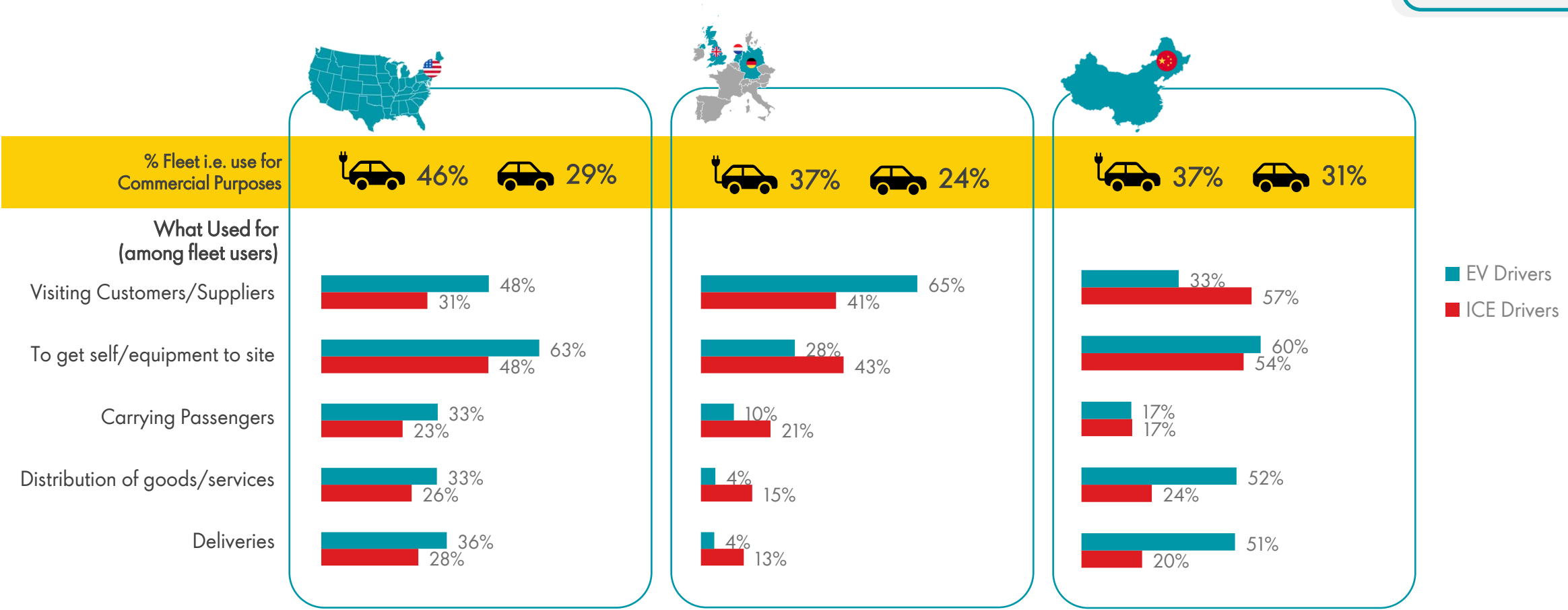
In both Europe and the USA, EVs are being used extensively with just over half doing more than 15,000km/year; a significantly higher proportion than among ICE drivers.

EVs continue to feature strongly in the fleet category; the wide range of uses offers us many opportunities to serve in this space

USE OF VEHICLE FOR COMMERCIAL PURPOSES

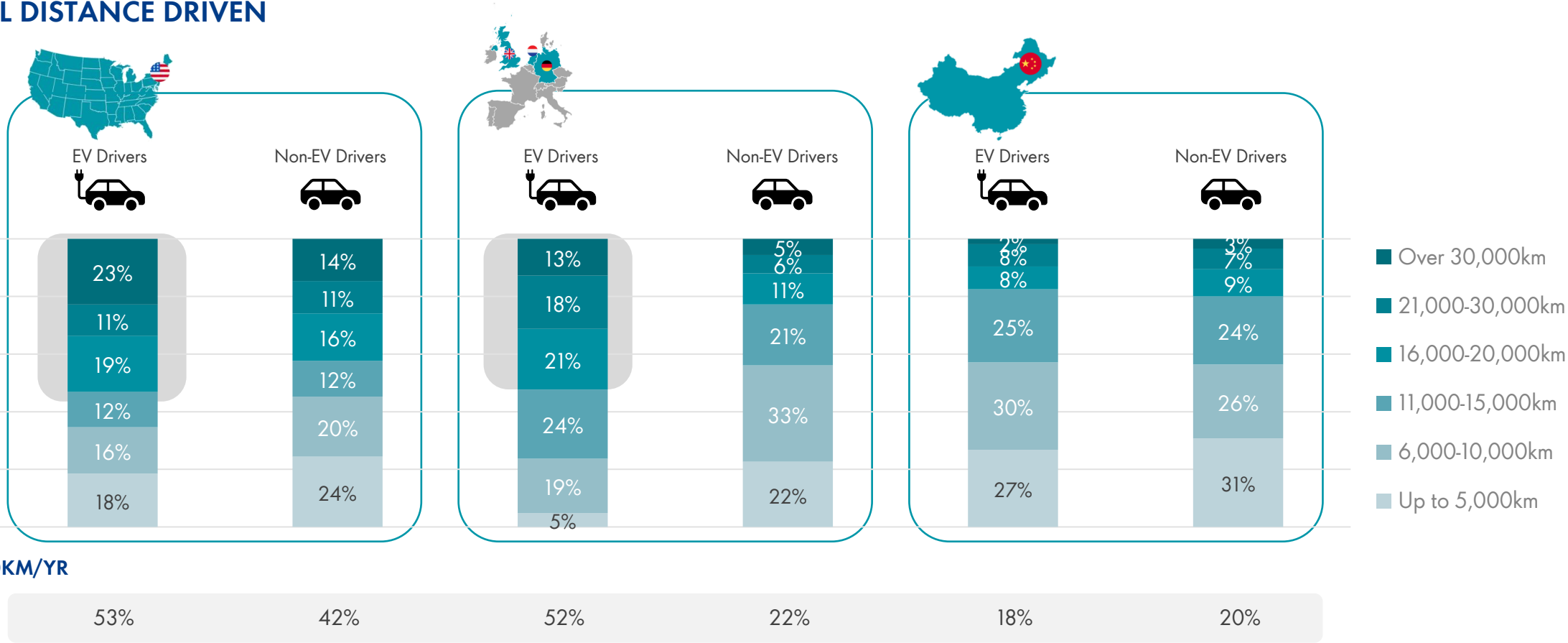
FLEET DEFINITION

Fleet is defined as any vehicle that is used for commercial purposes, with commercial purposes being the five reasons for use shown in the bar chart



EVs in both Europe and the USA are driven further than ICE vehicles; lower mileage in China generally across both vehicle types

ANNUAL DISTANCE DRIVEN



03 EV Purchase Intentions

What are they considering for their next vehicle?
What is the impact of legislation and low carbon
fuels on intentions?



KEY INSIGHTS

EV Purchase Intentions

As the market grows, those not yet owning an EV will likely become harder to convert. Among Non-EV drivers, legislation may eventually push adoption, but we are not seeing strong intentions to switch as of today.



MORE TO BE DONE TO CONVINCE ICE DRIVERS

Consideration levels for EVs have plateaued somewhat so there is still a long way to go in this category. As the category has grown quickly and been well embraced, those that have not yet switched are likely to be more resistant.

There will also be a need to convince these 'laggards' that fully electric is the way to go as many of them prefer PHEV over BEV.



THERE IS MUTED SUPPORT FOR LEGISLATION

Under half of ICE drivers in USA and Europe are in any way supportive of government initiatives to phase out ICE vehicles – ICE drivers are becoming an increasingly hard audience to convert.

What support there is would reduce further if there aren't perceived improvements in the charging infrastructure and the cost of owning/running an EV.



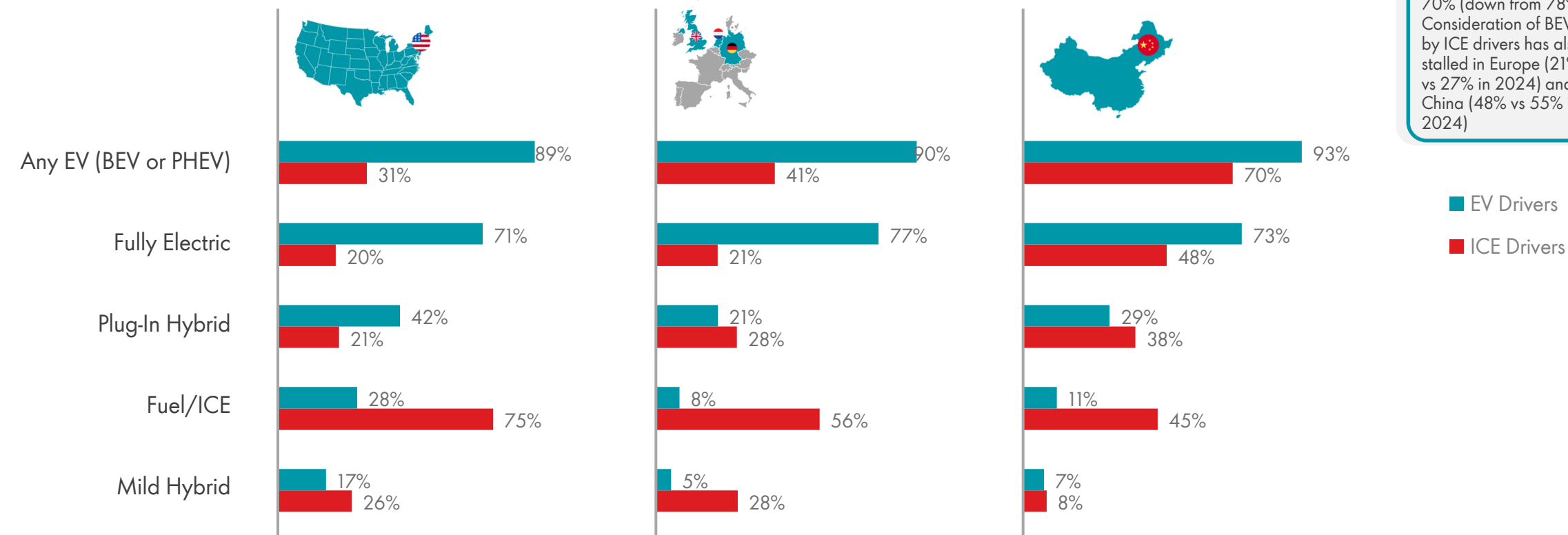
WORK IS NEEDED TO ESTABLISH LOWER CARBON ALTERNATIVES

Claimed awareness of lower carbon fuel alternatives is vague (albeit higher in China).

The potential impact of lower carbon fuel alternatives on EV switching is low, with a reluctance to pay any more for fuel than they are currently.

Consideration of an EV by ICE drivers is either static (USA) or stalling (Europe and China) – those not yet converted will likely need more persuasion

VEHICLE TYPES WILL CONSIDER FOR NEXT VEHICLE

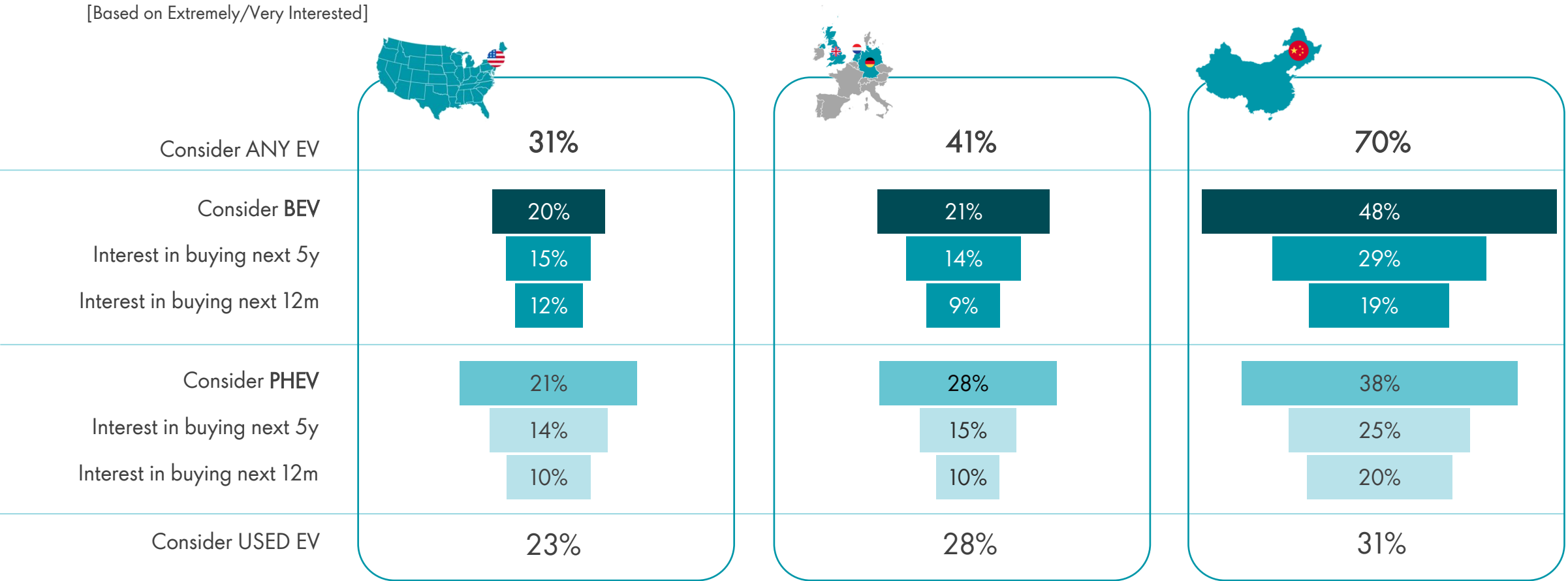


Among current BEV drivers, the proportion considering a BEV is 82% in Europe, 77% in the USA and 90% in China

In Europe and the USA there is a lot of work to be done to drive purchase intent and convince ICE buyers to go 'full' electric; a strong 2nd hand market could help

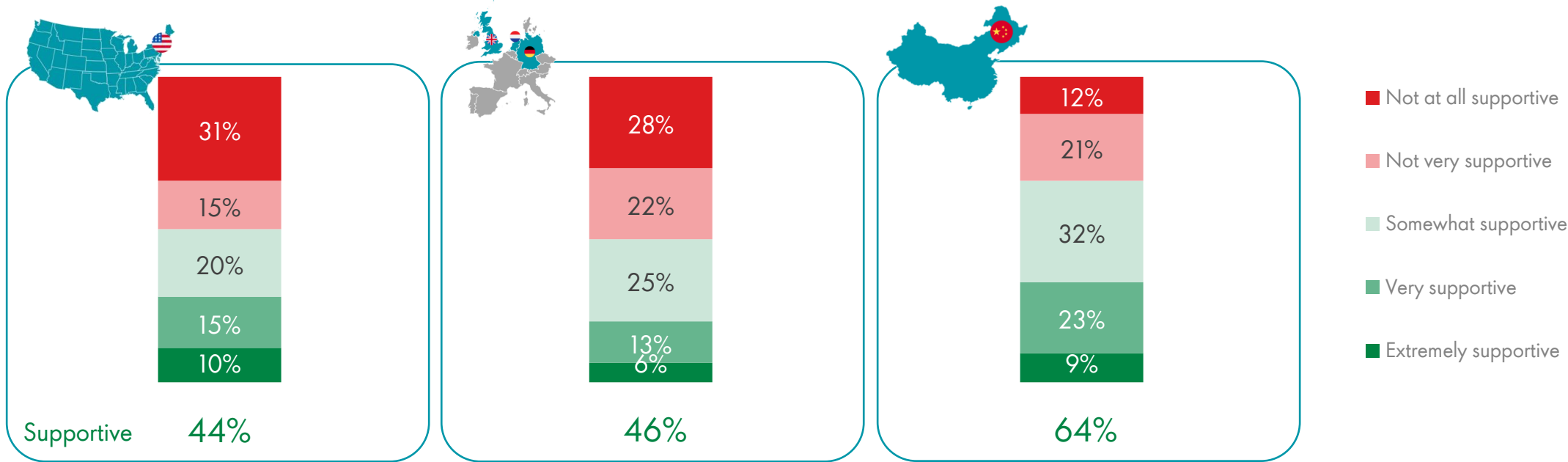
INTENTION TO PURCHASE (AMONG NON-EV DRIVERS)

[Based on Extremely/Very Interested]



Support for the phasing out of ICE vehicles amongst ICE drivers is somewhat muted, and would decrease further without EV infrastructure and affordability improvements

SUPPORT FOR GOVT ICE PHASING OUT POLICY

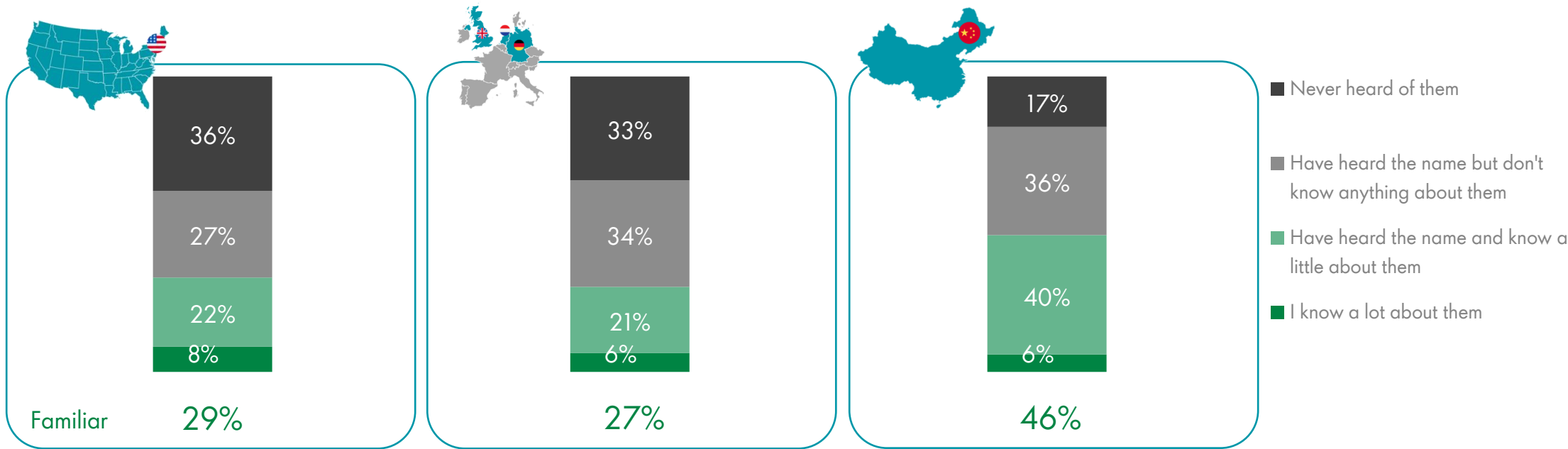


CONTINUE TO SUPPORT (AMONGST SUPPORTERS) IF...

Current charging infrastructure does not improve significantly	54%	50%	72%
Overall cost of EVs relative to ICE stays same as today	57%	51%	45%

Familiarity with lower carbon fuels is vague at best (higher in China), so there is work to do if it is to be seen as a viable EV alternative

ATTITUDES TO LOWER CARBON ALTERNATIVES

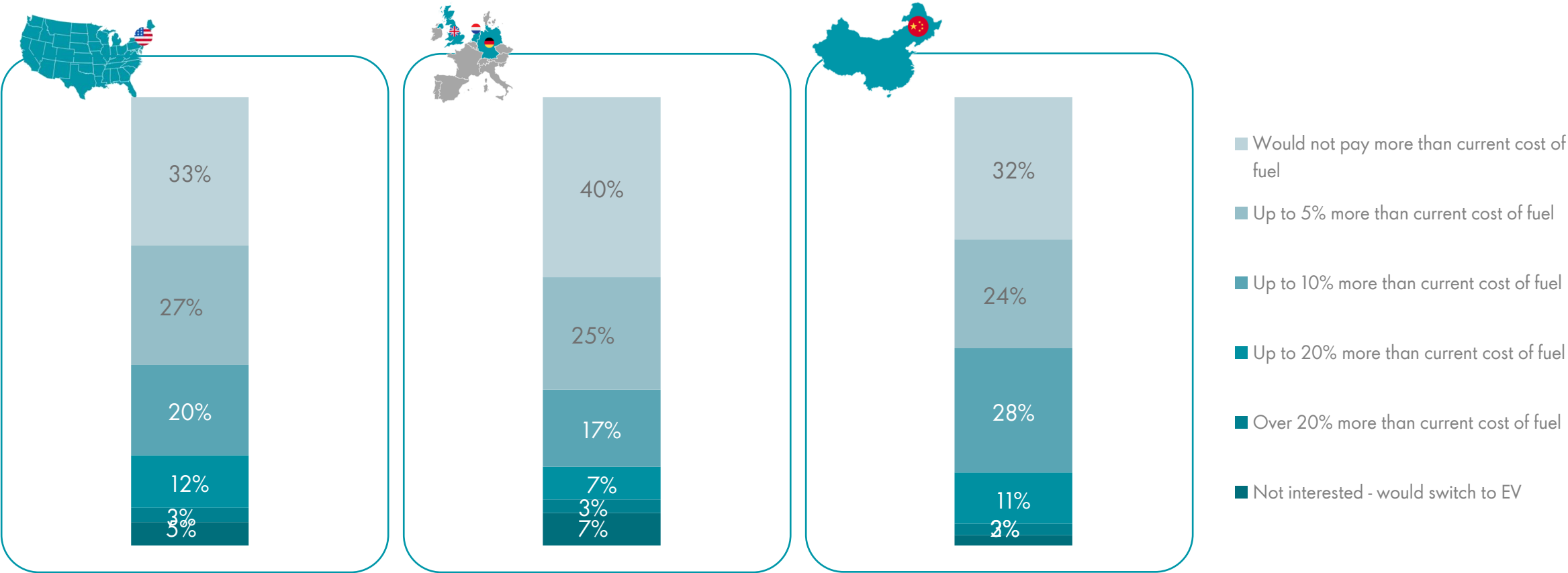


IMPACT ON LIKELIHOOD TO SWITCH TO EV (AMONG THOSE FAMILIAR)

More likely to buy EV	52%	35%	69%
No difference	36%	41%	26%
Less likely to buy EV	10%	16%	4%

There is resistance to paying more than current fuel for lower carbon alternatives with 10% more (if at all) being a ceiling for most

WILLINGNESS TO PAY FOR LOWER CARBON ALTERNATIVES



04

Attitudes to EVs

What are the benefits of an EV?
What are the barriers to purchase?



KEY INSIGHTS

Attitudes to EVs

Saving money and the environment are key motivators, but there will need to be reassurance on range anxiety and charging infrastructure to bring more ICE drivers (an increasingly resistant cohort) into the category.



THE ENVIRONMENT IS STILL A MAJOR FACTOR, BUT BECOMING LESS SO

Current EV drivers still see the environmental impact and money saving as key (and broadly equal) benefits they have realised from being an EV driver, and these are the same key benefits that are driving consideration in general.

While the environment is still an influence, there is evidence that it is reducing and that EVs are potentially becoming more of a 'pragmatic' purchase and less 'altruistic/emotional'.



THE 'HIDDEN' BENEFIT IN ENJOYING THE EV DRIVE CAN STILL BE EXPLOITED

EV drivers on our SRS database cited the enjoyment of driving an EV as the #1 benefit they have realised, but this is still not something recognised by those considering an EV.

Communicating the EV-driving experience could be key to bring increasingly-resistant ICE drivers into the category.



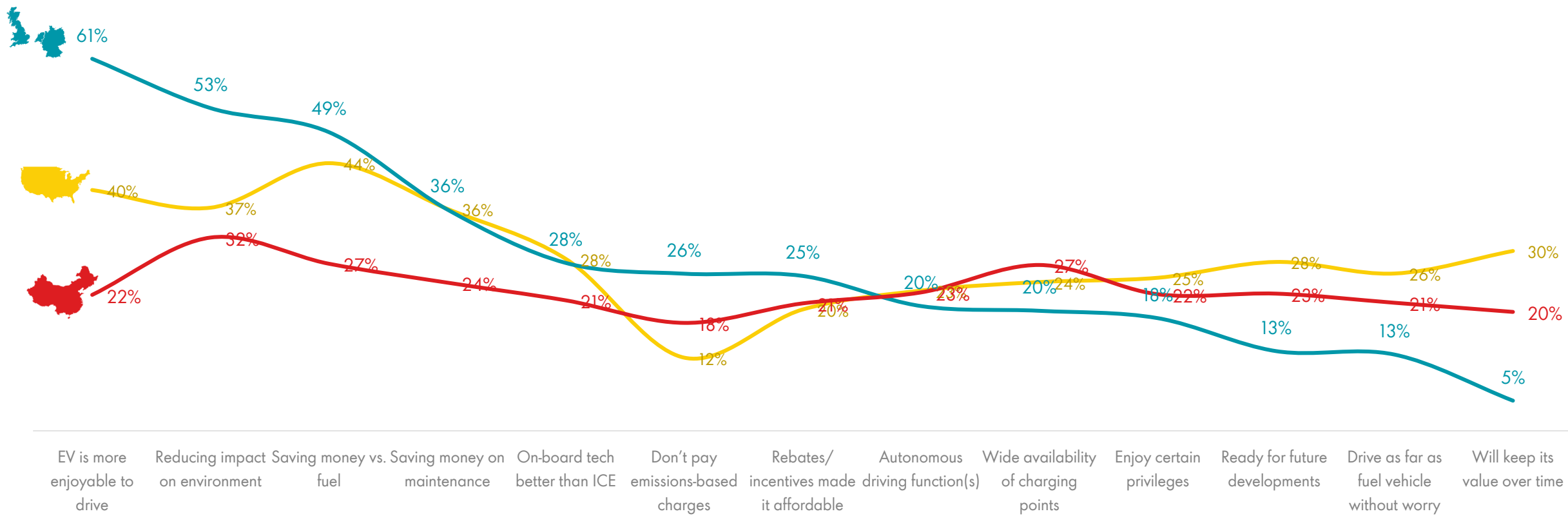
BUT RANGE/CHARGING IS A BARRIER THAT STILL NEEDS TO BE SOLVED

Aside from the high cost of vehicles (in Europe and the USA), range anxiety and perceptions of a lack of public charging are the key reasons for not considering an EV.

Although perceptions of charging infrastructure have improved amongst current EV drivers and imminent EV considerers, we need to do more to convince current ICE drivers – an increasingly resistant group.

The environment and saving money are common across regions to communicate, but the enjoyment of driving an EV is also strong – particularly in Europe

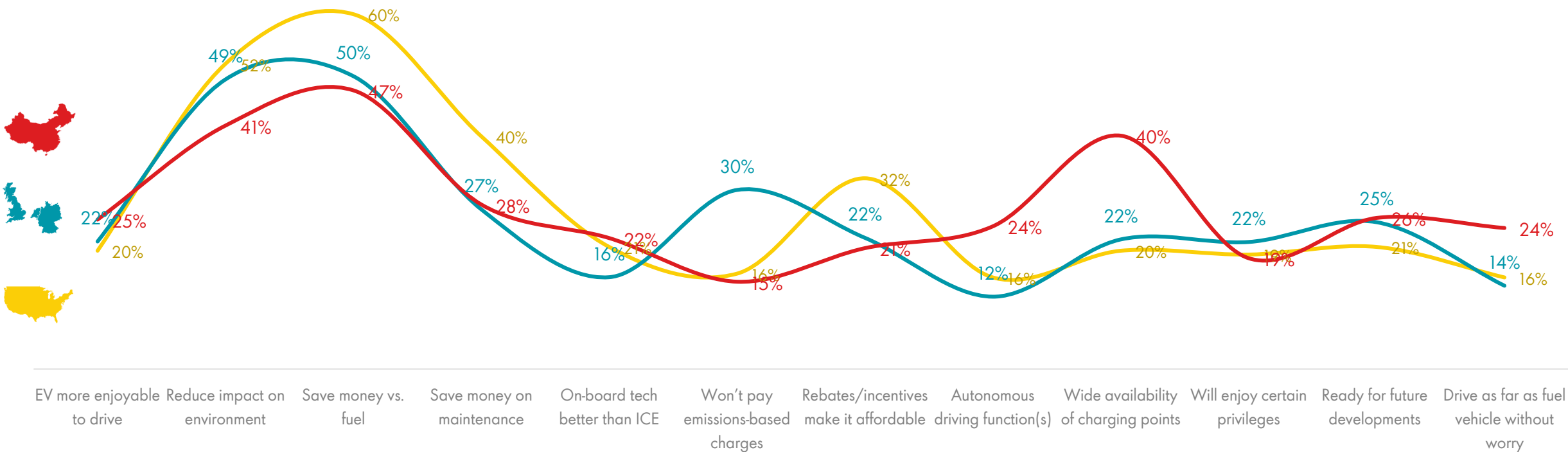
BENEFITS EXPERIENCED AMONG EV DRIVERS



Saving money and the environment are also key for considerers, but the EV driving experience isn't a major factor, so has potential to create intrigue

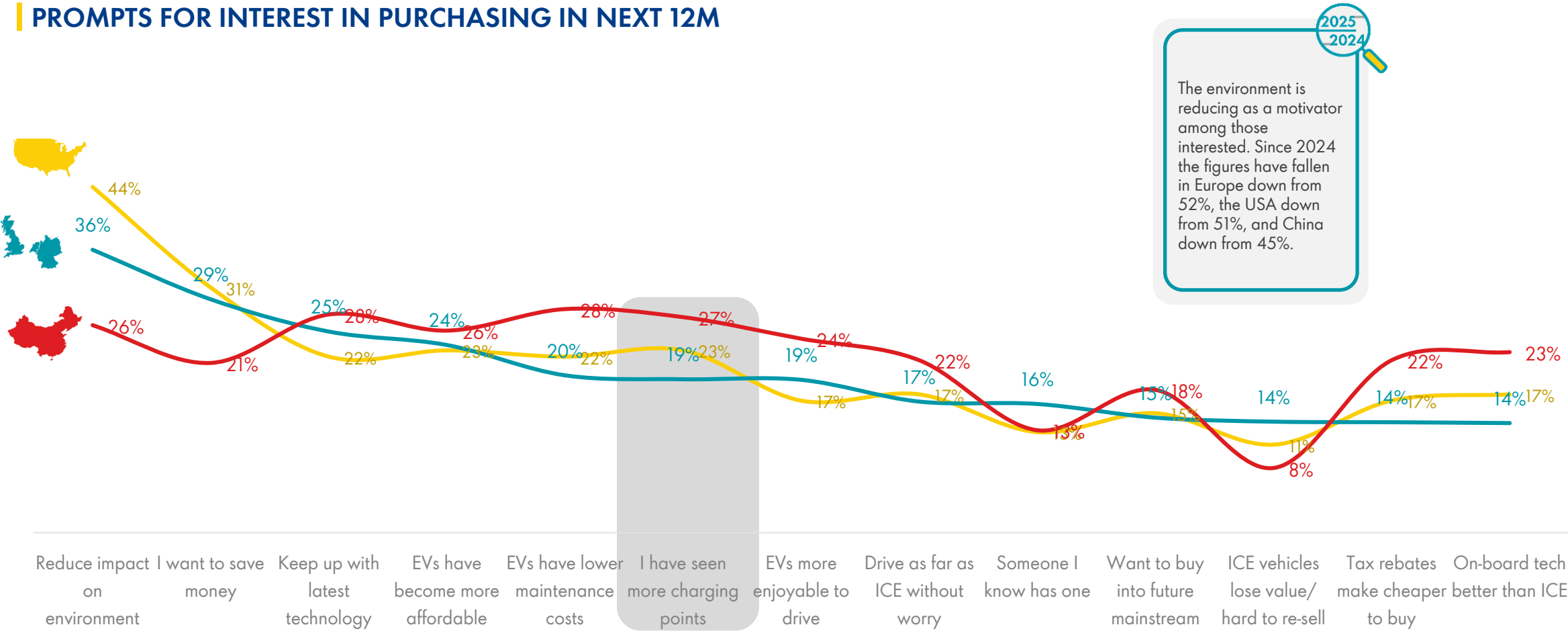
BENEFITS ANTICIPATED BY THOSE CONSIDERING EV FOR NEXT VEHICLE

(NOTE: Rank Ordered by EV Driver data)



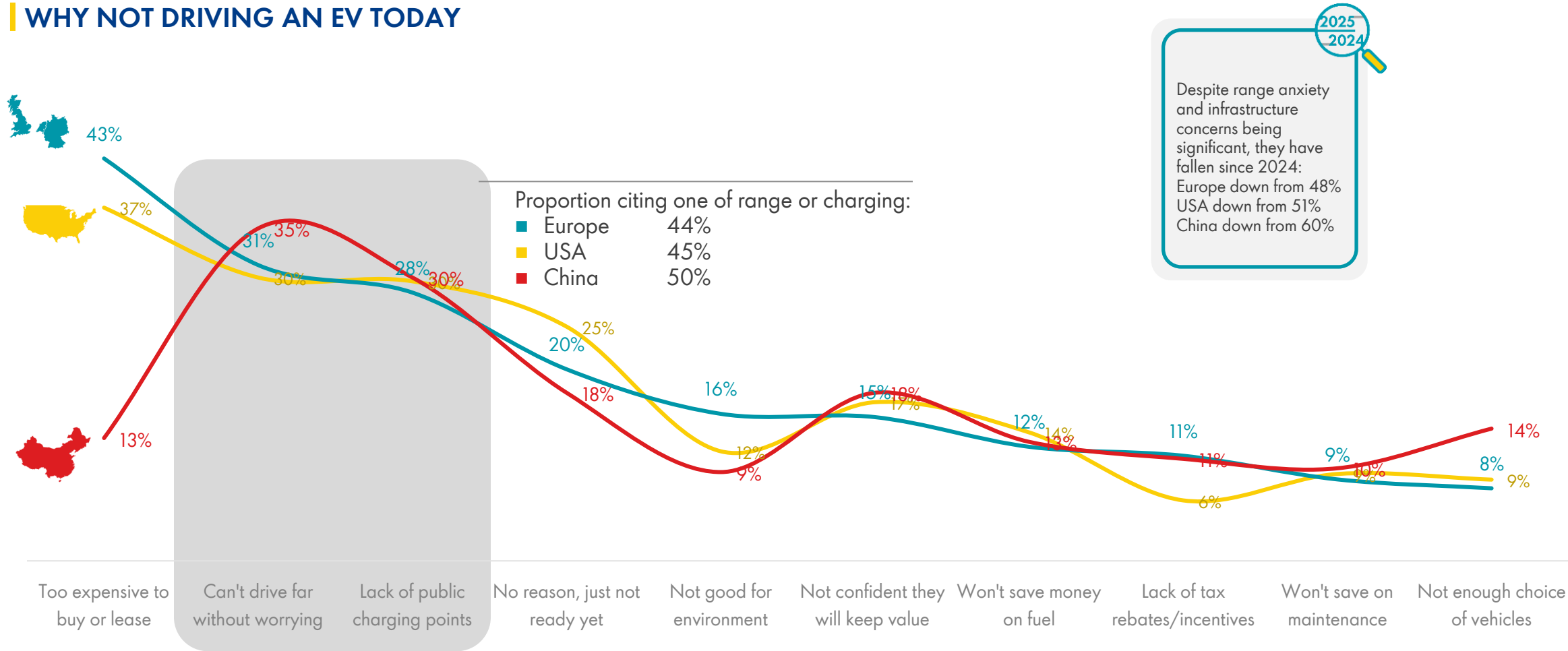
But in the short term, the environment is still a key driver of purchase intent; improvements in the charging network are also (still) making a positive impact

PROMPTS FOR INTEREST IN PURCHASING IN NEXT 12M



Vehicle cost is the main barrier in Europe/USA; but range anxiety and charging infrastructure are still significant and could do with some 'myth busting'

WHY NOT DRIVING AN EV TODAY



05

Charging Landscape

Where are drivers charging?
How do they feel about range anxiety and the
charging infrastructure?



KEY INSIGHTS

Charging Landscape

The public charging network is seen to be improving, and EV drivers are prepared to travel and potentially pay more for a better experience. As the infrastructure improves, this opens up more opportunities for food/drink, retail, and other offerings that take advantage of dwell time.



PUBLIC CHARGING IS COMMONLY USED BUT THE BASICS NEED TO BE RIGHT

Cost, speed, and availability of charging are the top drivers of charger location choice.

But there is also a need to consider the wider experience beyond just charging – facilities, retail, food and drink.



THE CHARGING EXPERIENCE IS GETTING BETTER BUT EUROPE IS BEHIND CHINA AND USA

EV drivers in USA and China are recognising improvements in the charging network, including reliability and overall experience.

Although European drivers see improvements, they are behind other regions. This translates into a lower level of improvement in worrying about running out of charge.



USA AND CHINA ARE MORE LIKELY TO DWELL AND PRIORITISE BATTERY OVER SPEED

European EV drivers prioritise charging speed over battery care and often want to spend as little time as possible charging their vehicle.

Improving the charging experience for European drivers could help drive more desire for dwell time which we are currently more likely to see in the USA and China.

Most EV drivers have access to home charging, but with different regional dynamics – Europe has more headroom to increase home charging access

ACCESS TO EV CHARGER AT HOME



Yes, have access to a charger just for my vehicle(s)/household	84%	68%	71%
Yes, have access to a charger that is shared with other households	9%	4%	23%
No, do not have access to a charger at home	8%	28%	7%

Imminent EV intenders are mostly planning to charge at home, with few anticipating being wholly dependent on public networks

INTENTION TO CHARGE AT HOME



Yes, I will install a wall or box-mounted charger	56%	52%	52%
Yes, I will use a combination of adapters and extension leads to charge from a standard wall socket	21%	19%	40%
No, I will not charge at home	13%	16%	6%
Don't know	10%	13%	1%

EV drivers are utilising a wide variety of charging touchpoints

WHERE CURRENTLY CHARGING AT LEAST WEEKLY



Private home charger	78%	60%	66%
Charging hub just for EVs	60%	36%	54%
At work/office	51%	29%	51%
Public destination away from home	55%	28%	50%
Public on street	46%	26%	49%
Fuel station	48%	16%	45%

Our own customers in Europe have more of a focus on home charging

WHERE CURRENTLY CHARGING AT LEAST WEEKLY

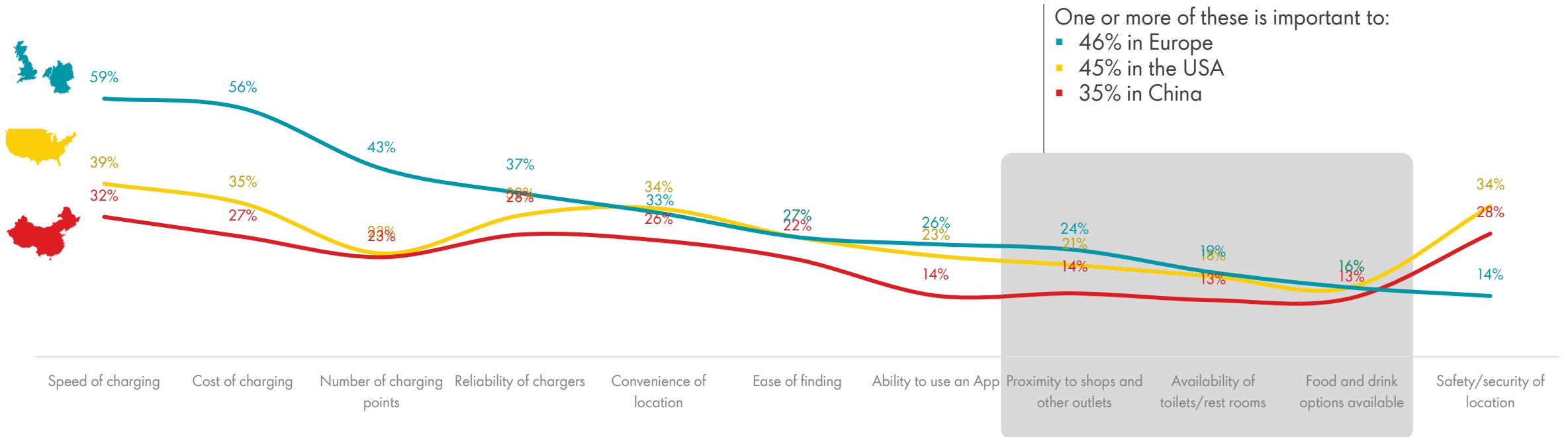


Private home charger	78%	(59%/70%)	66%
Charging hub just for EVs	60%	(34%/54%)	54%
At work/office	51%	(27%/53%)	51%
Public destination away from home	55%	(26%/48%)	50%
Public on street	46%	(25%/45%)	49%
Fuel station	48%	(15%/39%)	45%



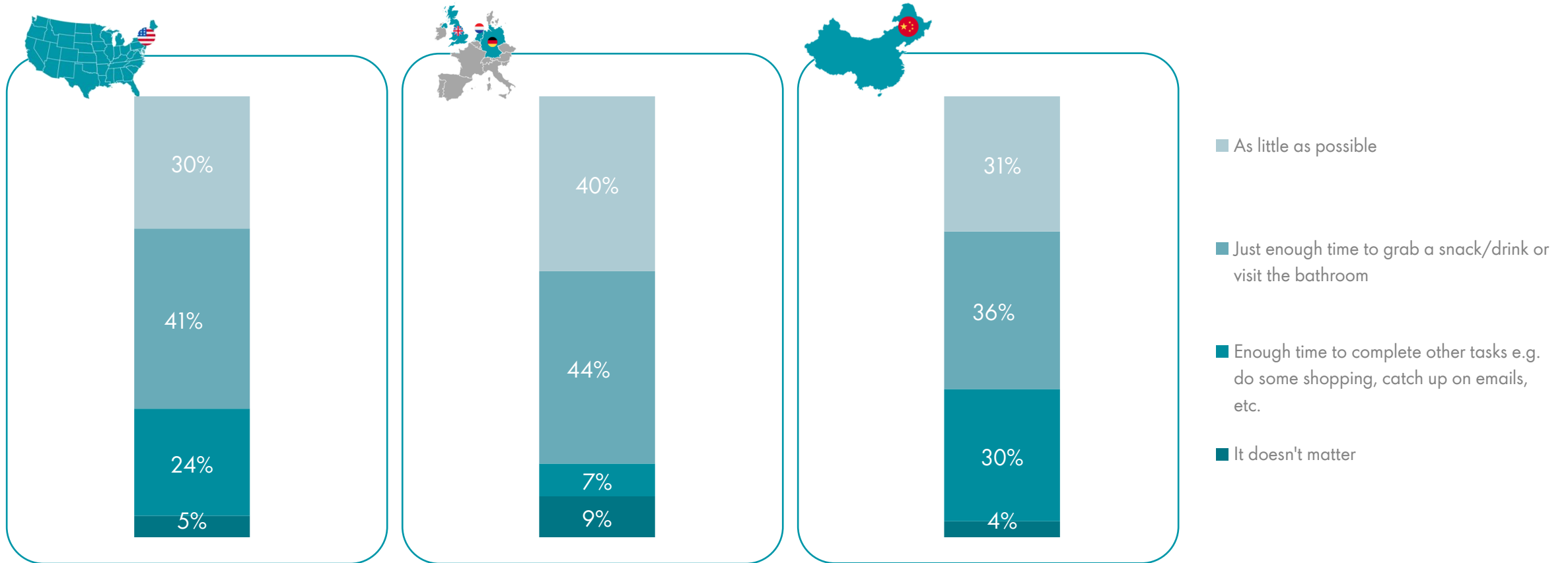
Choice of charger location is largely driven by cost, performance, and availability, but contextual facilities do play a part for many

DRIVERS OF CHOICE OF CHARGING LOCATION – GENERAL



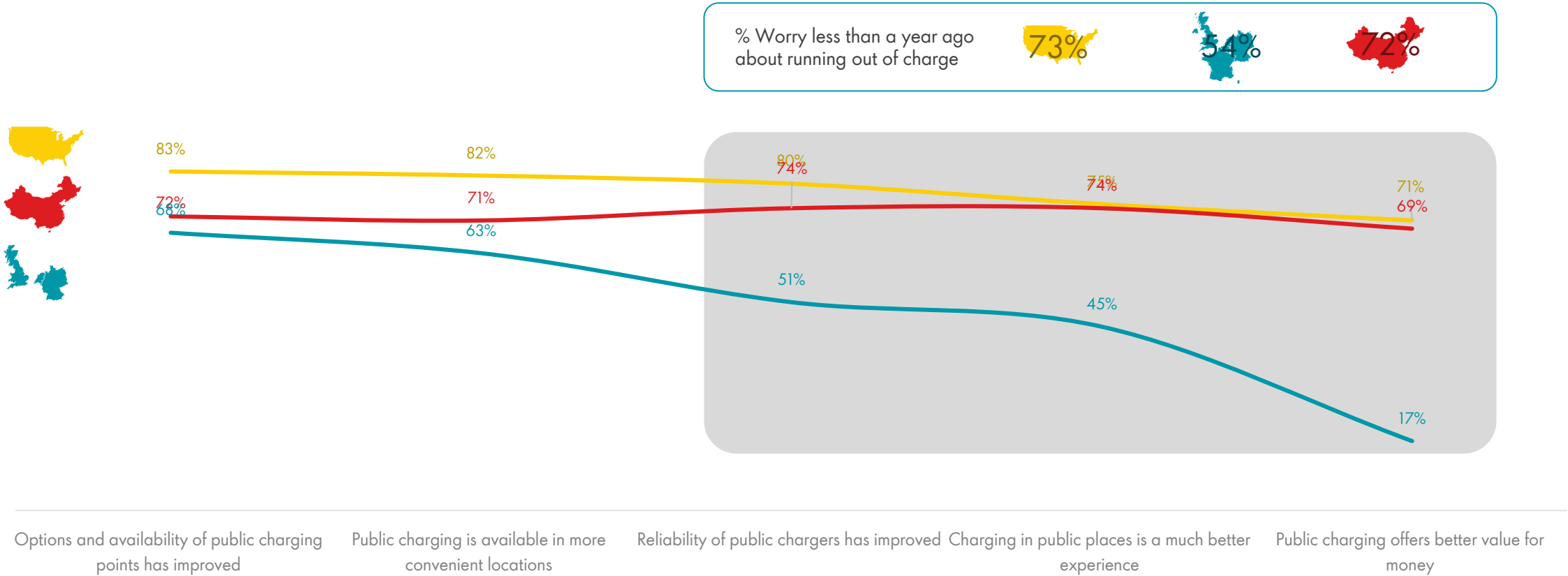
Although a fast charging experience is important, there is a need to cater for a 'broader' experience (retail, tasks etc)

IDEAL AMOUNT OF TIME CHARGING



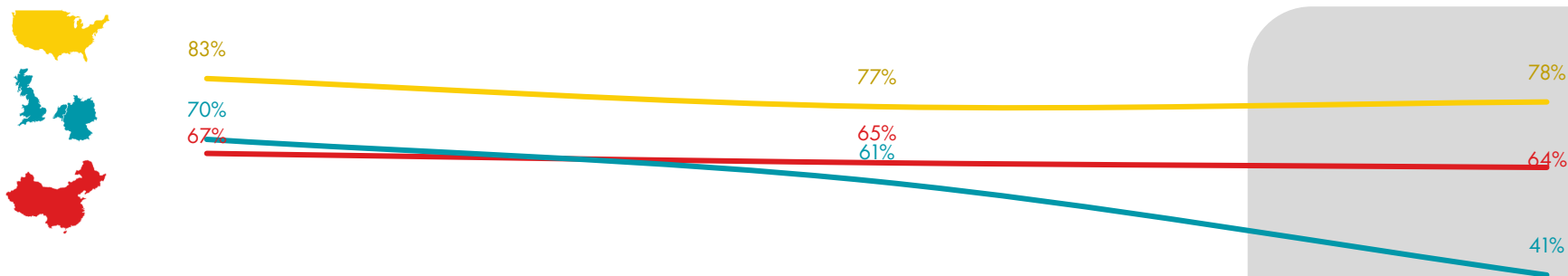
European charging experience and VFM perceptions are behind USA and China resulting in less improvement in concern about running out of charge

AGREEMENT WITH STATE OF CHARGING COMPARED TO A YEAR AGO



And there is a desire for a better charging experience, although European drivers are less likely to want to pay for a faster charging experience

AGREEMENT WITH STATEMENTS ON CHARGER LOCATION CHOICE



I would drive further for a public charging point, if I know it's offering a reliable and easy to access charging experience

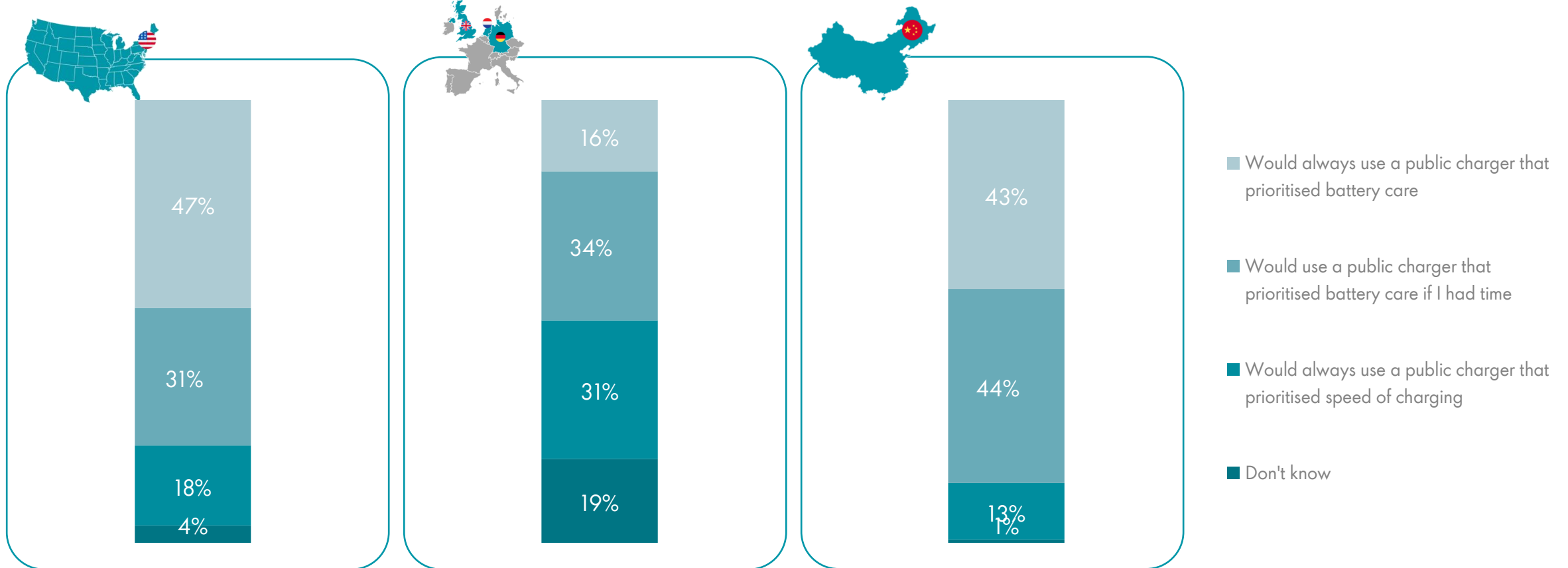
I would be happy to drive to a charging station that is not the nearest one if it had the facilities I wanted

I am happy to pay more for a public charger if it is faster



USA and China tend to prioritise battery care over speed, whereas European drivers tend to prioritise speed

PRIORITISE BATTERY CARE OR SPEED?



In Europe, the proportion that would always use a charger prioritising battery care rises to 23% among those who bought privately

06

Managing Long(er) Journeys

How often are longer journeys made and how are they managed?

How can we increase dwell time?



KEY INSIGHTS

Managing Long(er) Journeys

Beyond the charging points themselves, there are opportunities for us for retail, food and drink for those taking longer journeys. Whether they drive an EV or ICE, longer journeys often demand a broader experience



FOOD/DRINK AND RETAIL ARE IMPORTANT

Whether EV or ICE, many plan their routes for longer journeys to incorporate facilities beyond just charging and/or refuelling.

Catering to this desire for a broader experience gives us an opportunity to deliver on facilities, retail, and food and drink.



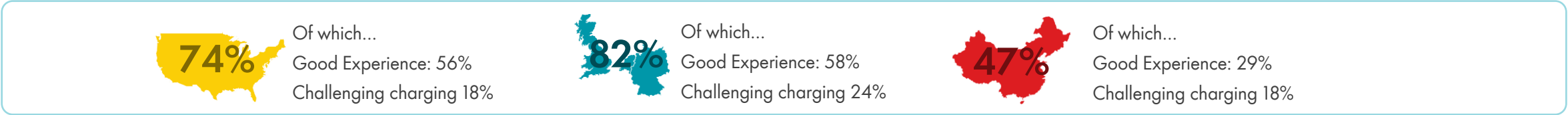
MANY STILL USE ICE VEHICLE FOR LONGER JOURNEYS

For those with both an EV and an ICE vehicle, there is still a job to do to convince them to think 'EV first' when planning long journeys.

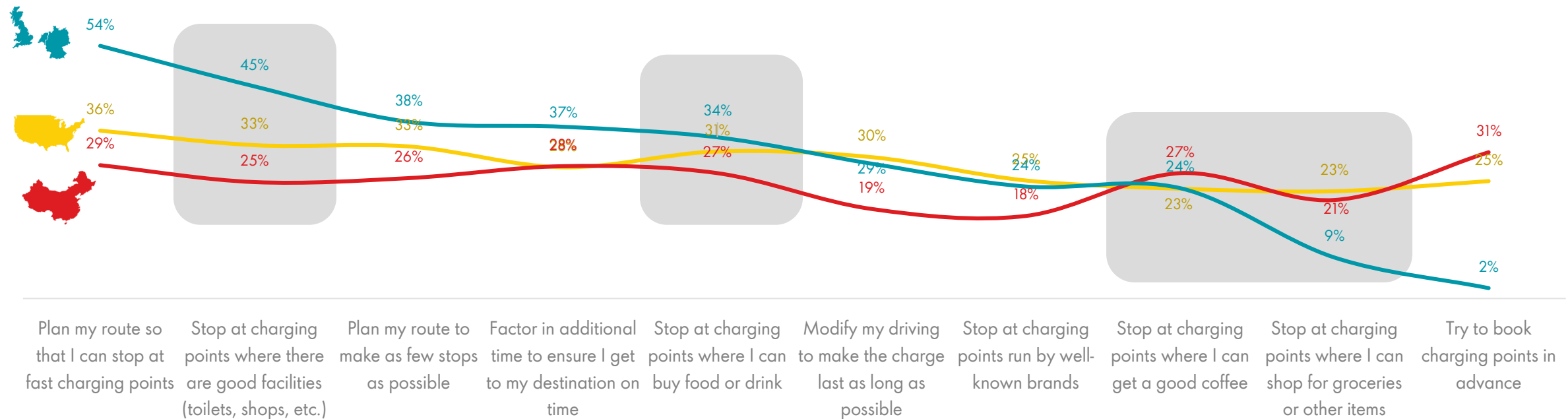
There is a residual fear (particularly in the USA) of being inconvenienced by the lack of charging point availability.

Most EV drivers in Europe and USA have taken long journeys needing a stop, with a lot of opportunity to deliver on retail and food/drink needs

LONG JOURNEYS TAKEN IN EV

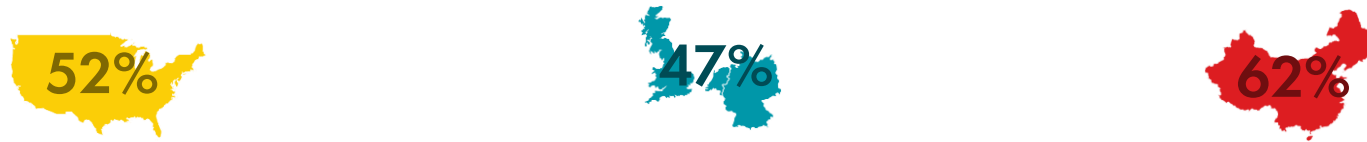


EV BEHAVIOUR ON LONG JOURNEYS

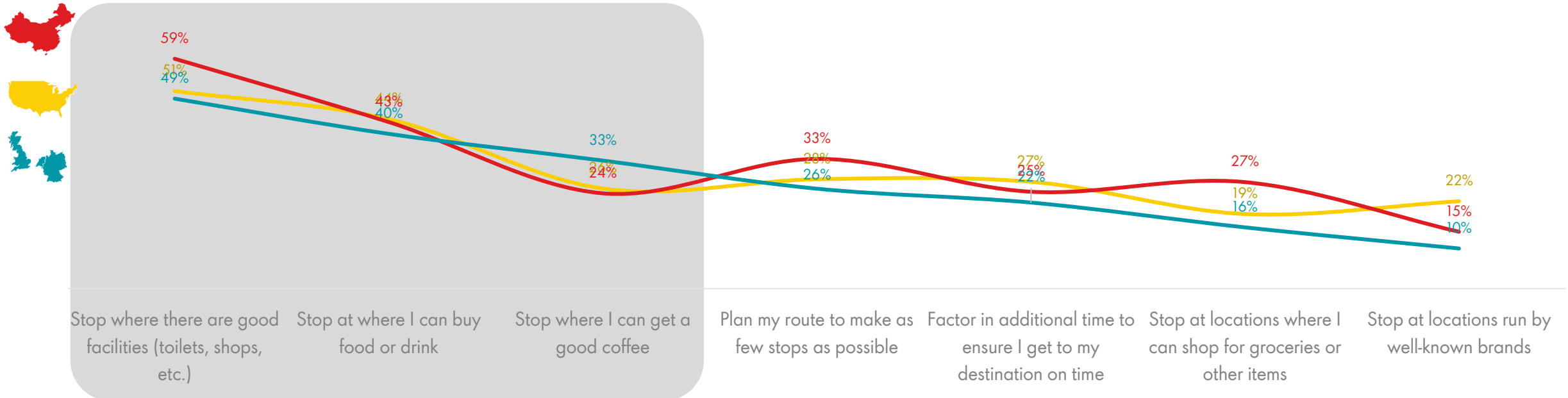


The 'dwell time opportunity' on longer journeys is also strong amongst ICE drivers

LONG JOURNEYS TAKEN IN ICE (AT LEAST MONTHLY)

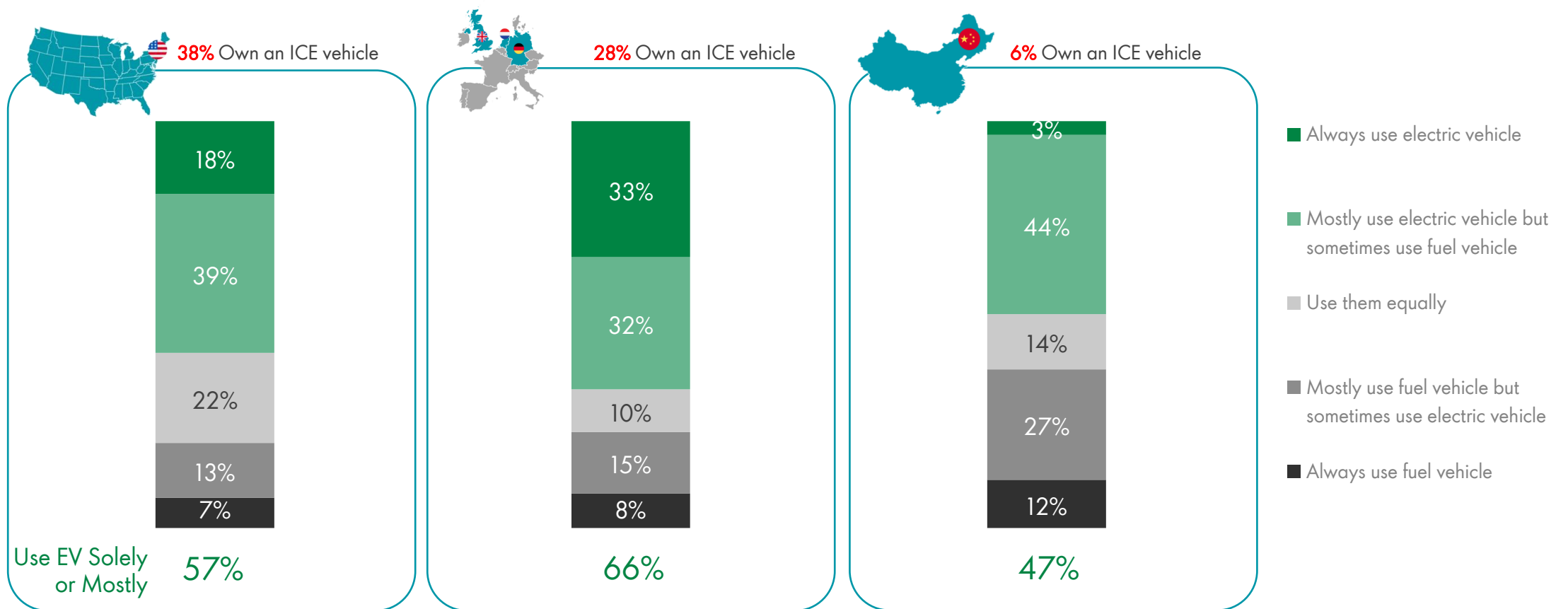


ICE BEHAVIOUR ON LONG JOURNEYS



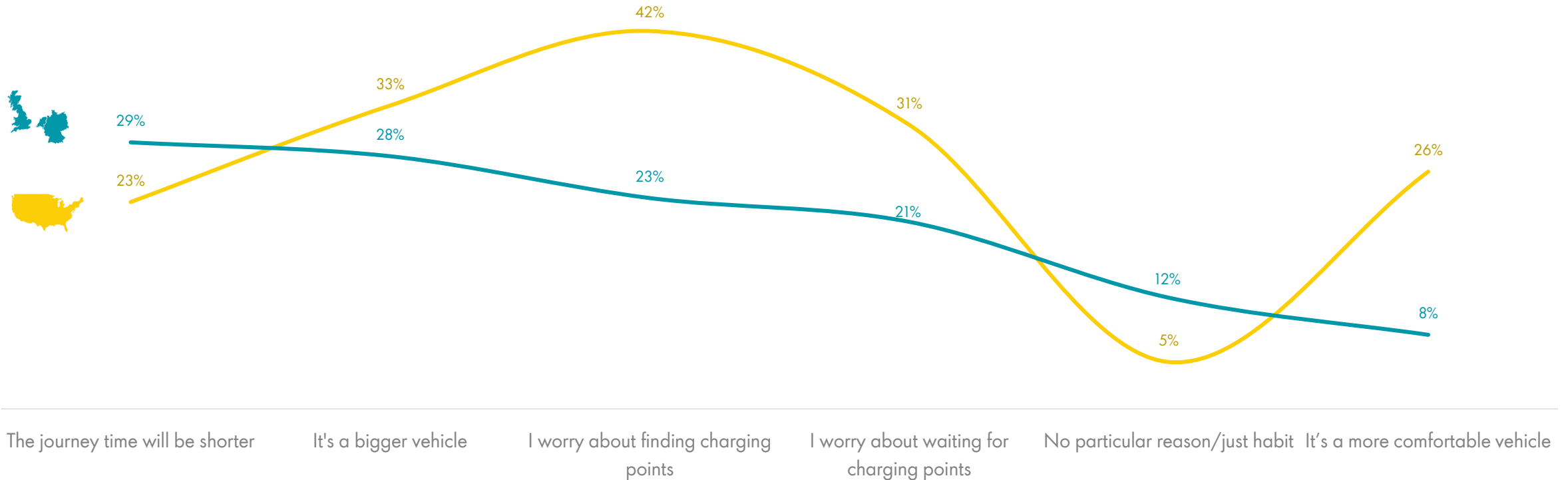
Most EV drivers who have an ICE vehicle use it for at least some longer journeys – although in Europe a significant proportion rely solely/mostly on their EV

EV OR ICE FOR LONGER JOURNEYS



Despite noted improvements in the out of home network, there is still some concern around charging points (especially in USA) to be addressed

REASONS FOR USING ICE VEHICLE ON LONG JOURNEYS



07

Non-Fuel Retail

What NFR items are being purchased?
How has being an EV driver impacted spend?
What is the role of coffee in the NFR experience?



KEY INSIGHTS

Non-Fuel Retail

There are clear opportunities in NFR, as the majority are purchasing at least monthly, with coffee, soft drinks and snacks universally popular. Coffee (the #1 purchase) can be a key part of the offer, but there is a need for improvement in Europe in order to succeed.



THE MAJORITY ARE
SPENDING IN NFR

The majority (75%) of EV drivers are spending monthly in NFR, with purchasing highest in the USA.

On balance, switching to an EV has increased NFR spend, but notably this hasn't happened to the same extent in Europe, where spend on items other than coffee is lower than the other regions.



GOOD FACILITIES APPEAR TO
UNDERPIN SPEND

While bathrooms are commonly used across all regions, facilities such as seating and Wi-Fi (which would encourage dwell time) are also commonly used in the USA and China, but rarely in Europe, which is a likely contributor to the lower NFR purchasing.



COFFEE IS A KEY DRAW, BUT
QUALITY IS KEY

Coffee is the number 1 purchase across all groups and is generally seen as being good quality and improving (although again, less so in Europe).

Coffee can be a key part of the NFR offer, but the quality will need to be maintained as well as offering it at a price considered reasonable, particularly in Europe where it's the main reason for non-purchase.

The majority of drivers offer us an opportunity to sell NFR, with coffee being the most common purchase for EV drivers

NFR ITEMS PURCHASED AT LEAST ONCE A MONTH

Purchase at least one item

EV Drivers



75%

Non-EV Drivers



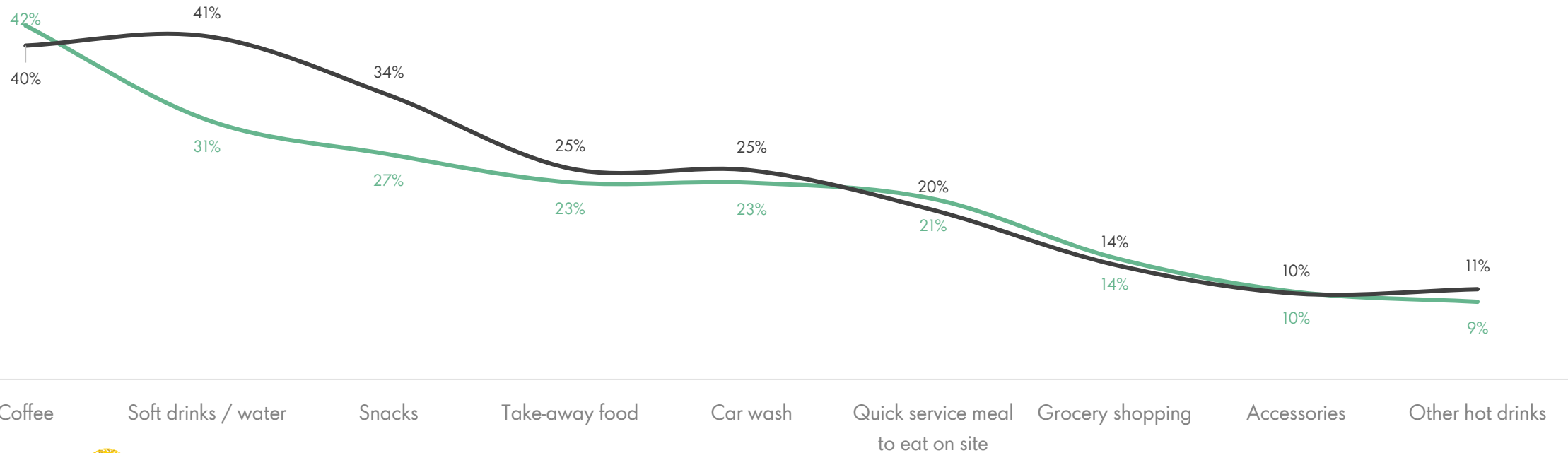
80%



EV Drivers



Non-EV Drivers



Shell
INSIGHTS

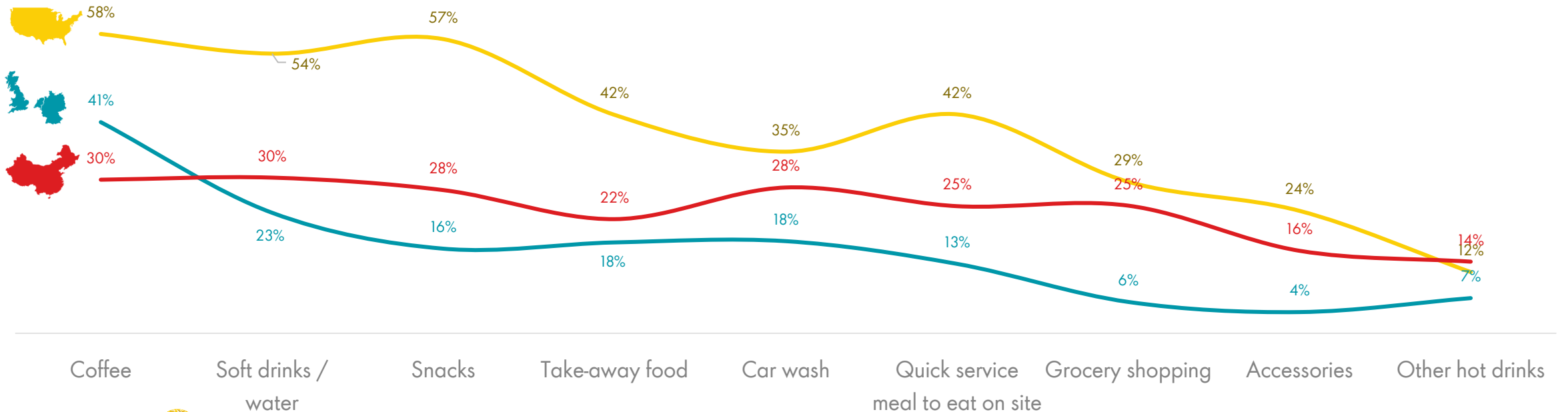


CF1. Which of the following do you buy at least once a month from a fuel station or service station?

Base: Total EV Drivers (Europe n=8,803, USA n=1,000, China n=1,000), Total Non-EV Drivers (Europe n=1,630, USA n=500, China n=500)

Coffee is also the number 1 opportunity among EV drivers across regions, with the USA being the biggest buyer of NFR goods

NFR ITEMS PURCHASED AT LEAST ONCE A MONTH (AMONG EV DRIVERS)



The majority are also using station facilities so it will be important to get these right if we are to encourage dwell time

STATION FACILITIES USED AT LEAST ONCE A MONTH

Use at least one item



EV Drivers

73%

Non-EV Drivers



71%



EV Drivers

50%

Non-EV Drivers



51%

22%

22%

24%

21%

12%

14%

Toilet/bathroom facilities

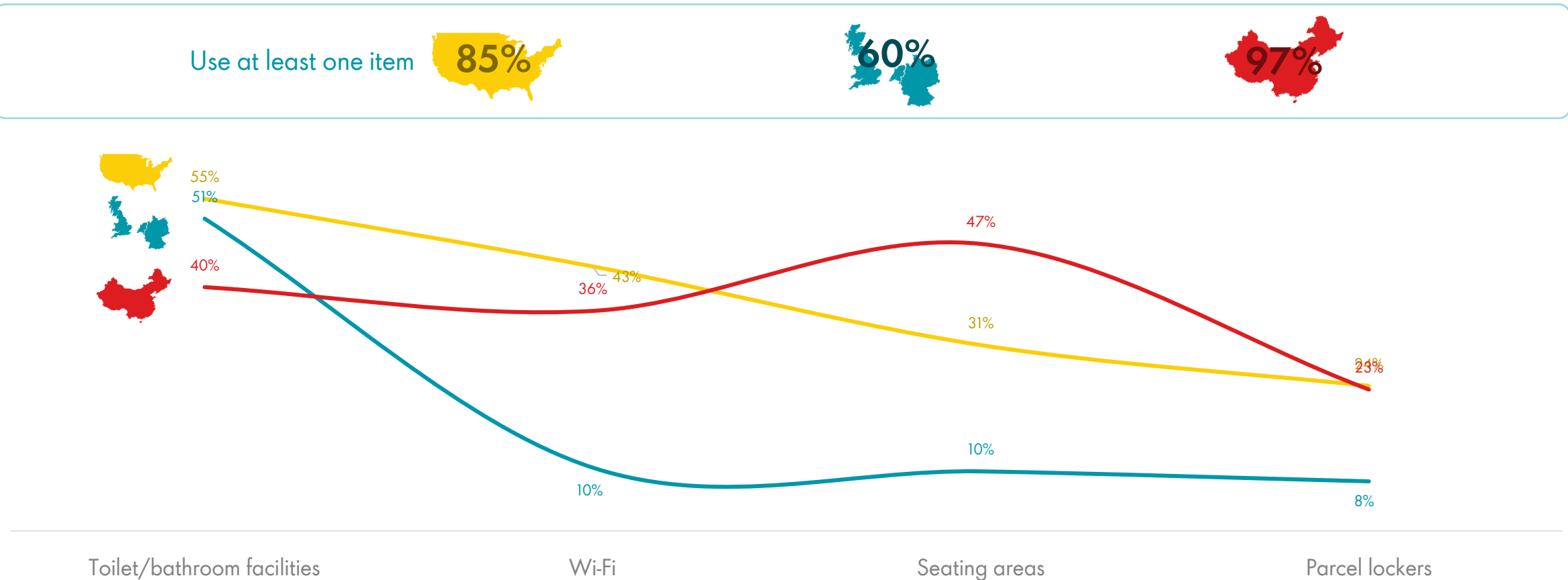
Wi-Fi

Seating areas

Parcel lockers

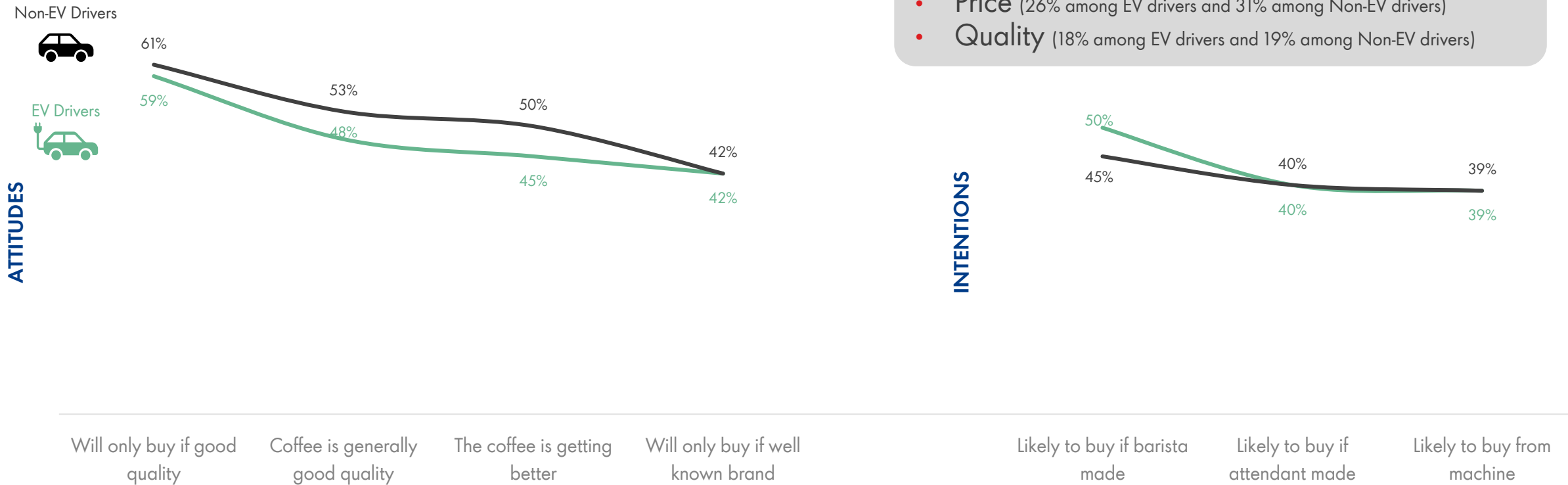
While bathrooms are important in all markets, European EV drivers are the least inclined to use other facilities which may offer us an opportunity

STATION FACILITIES USED AT LEAST ONCE A MONTH (AMONG EV DRIVERS)



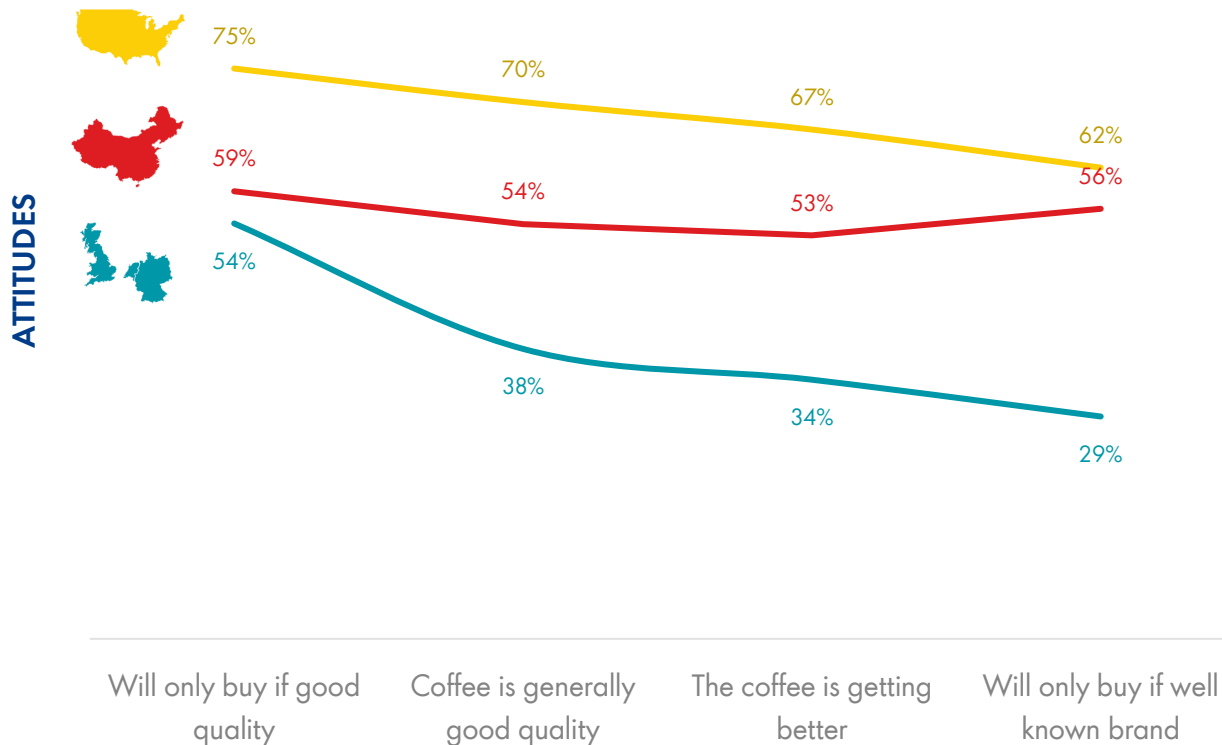
There is demand for good quality coffee among both EV and Non-EV drivers, with many feeling that the quality is both good and improving

ATTITUDES (% AGREEING) AND INTENTIONS (% DEFINITELY OR PROBABLY BUY) TOWARDS COFFEE



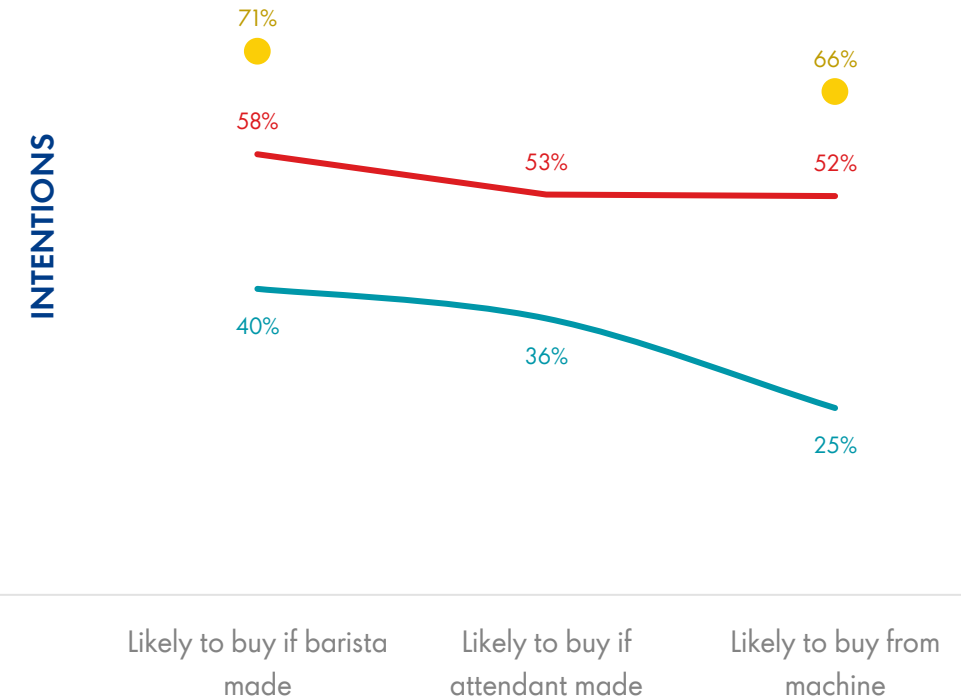
But Europe is felt to be behind both the USA and China in terms of the quality that is available, with price also a barrier

ATTITUDES (% AGREEING) AND INTENTIONS (% DEFINITELY OR PROBABLY WILL BUY) TOWARDS COFFEE (AMONG EV DRIVERS)



The main controllable barriers to buying coffee are:

- Price (USA 14%, Europe 31%, China 19%)
- Quality (USA 27%, Europe 14%, China 20%)



Overall Key Themes



Reliance on fuel continues to diminish

EV drivers are moving further away from ICE/fuel and trusting their EV. Additionally, the 'direction of travel' is to BEV rather than PHEV, further cementing trust in the EV category.

There are signs of a growing second-hand market in Europe which will help make further inroads to current ICE drivers.



Remaining ICE drivers will be increasingly resistant

EV drivers not only enjoy the driving experience but also see an improving charging network and experience less range anxiety.

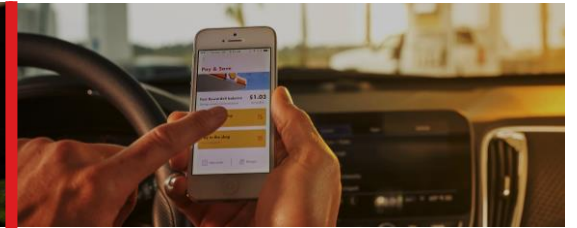
The remaining cohort of ICE drivers will be harder to 'convert' – they don't see the improvements in infrastructure that EV drivers experience. Reassurance as to the EV experience will be key.



We need to get charging right before offering add-ons

Public charging needs are focused on the basics of speed, availability, and reliability (along with price); we have to get these right.

There is a role for facilities, food/drink and retail once we are comfortable that we have a great charging experience. There are signs that drivers want dwell time.



There is a significant NFR opportunity

Quality coffee provision would help with the broader experience whilst charging. But there are also indications that seating and Wi-Fi are being used in the US and China, and they seem to be making a difference.

The European experience is not as rewarding – bringing the US/China experience to Europe could improve experience and satisfaction.



#Powering Progress