



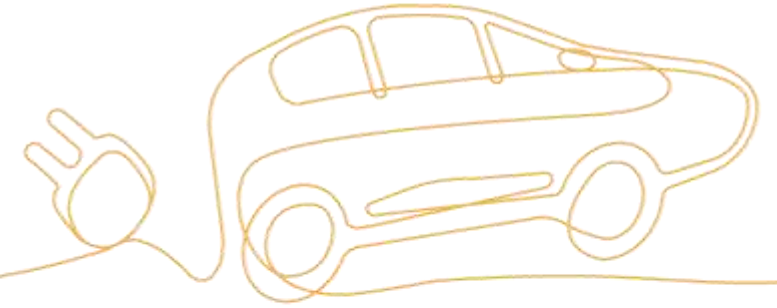
# How do you Charge? Surveying EV Drivers from across Europe

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management by measurement



# HOW DO YOU CHARGE?

## SURVEYING EV DRIVERS FROM ACROSS EUROPE

Cenex-LCV - 4<sup>th</sup> September 2019

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# Delta-ee enables organisations to develop the best strategies, business models and customer propositions for the energy transition

Clients work with Delta-ee because our unparalleled research base provides both breadth and depth of expertise, spanning:

## 'New Energy' Business Models

Identify and understand the alternative and new business models for the energy transition



### EVs & Electricity

Understand the opportunities and challenges from sector coupling between electricity and transport



### Flexibility & Energy Storage

Take advantage of the opportunities emerging from an active demand side



### Heat

How channel disruption, sector coupling and new technologies are changing the heat sector



### Distributed Power

Global market insight & expertise into the growing role of decentralised generation



### Digital Energy

Opportunities in the connected home market and how digitalisation is changing the energy customer relationship

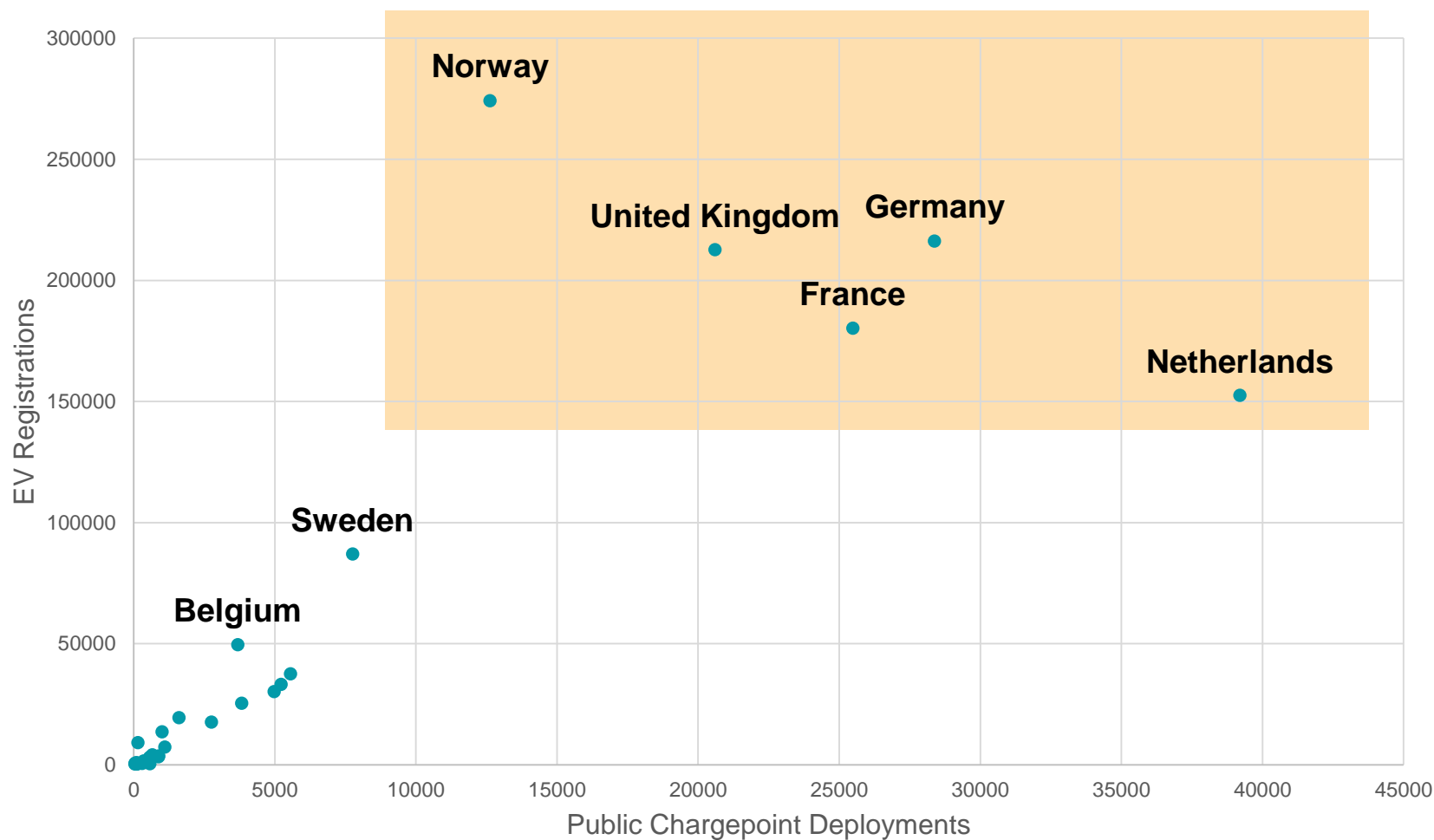
## Delta-ee provides:

- Subscription Research Services
- Consultancy



# Why we carried out European EV Customer Research?

## Answering our subscribers' questions.



# What did we do?

## Using Delta-ee's European Customer Panel for EV research

### **An online survey of 1,000 participants**

- 50% EV owners
- 50% prospective EV owners
- 5 languages

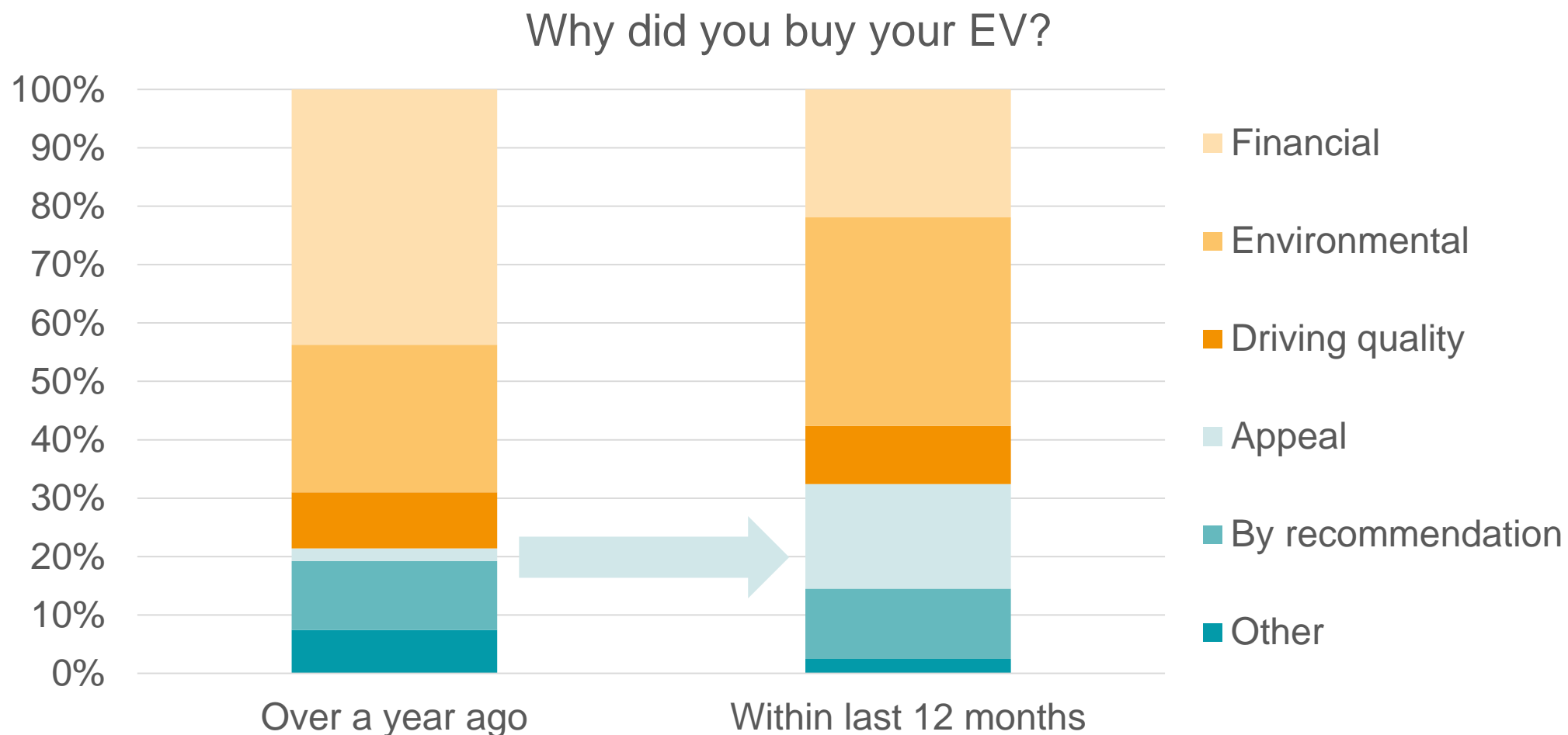
### **Questions on current behaviours and attitudes to future adoption**

### **Statistical analysis and comparison between markets**



# New EVs are more appealing

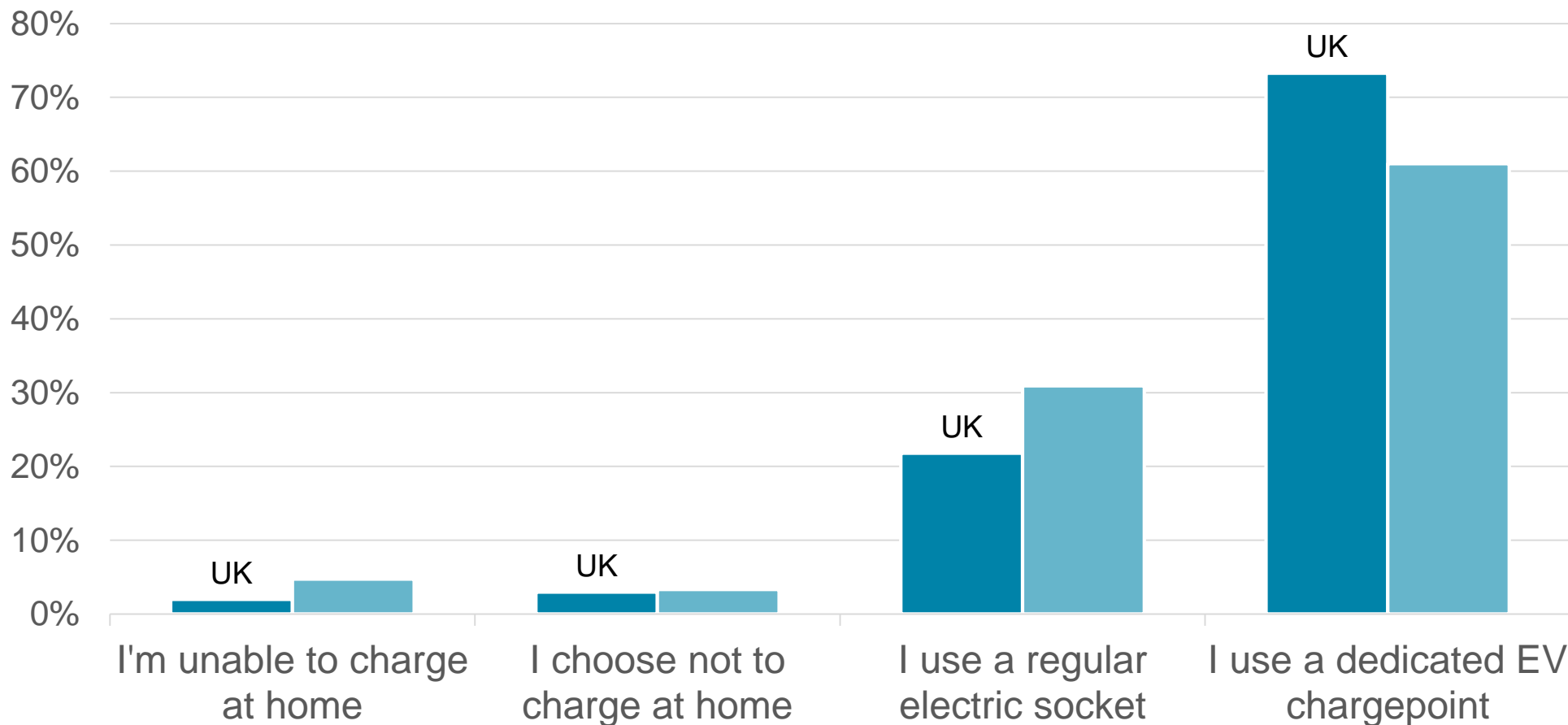
Shift in motivations for EV purchase is evident in the UK



# Most UK EV owners use a dedicated chargepoint at home

Over 20% said they plug into a regular three pin socket

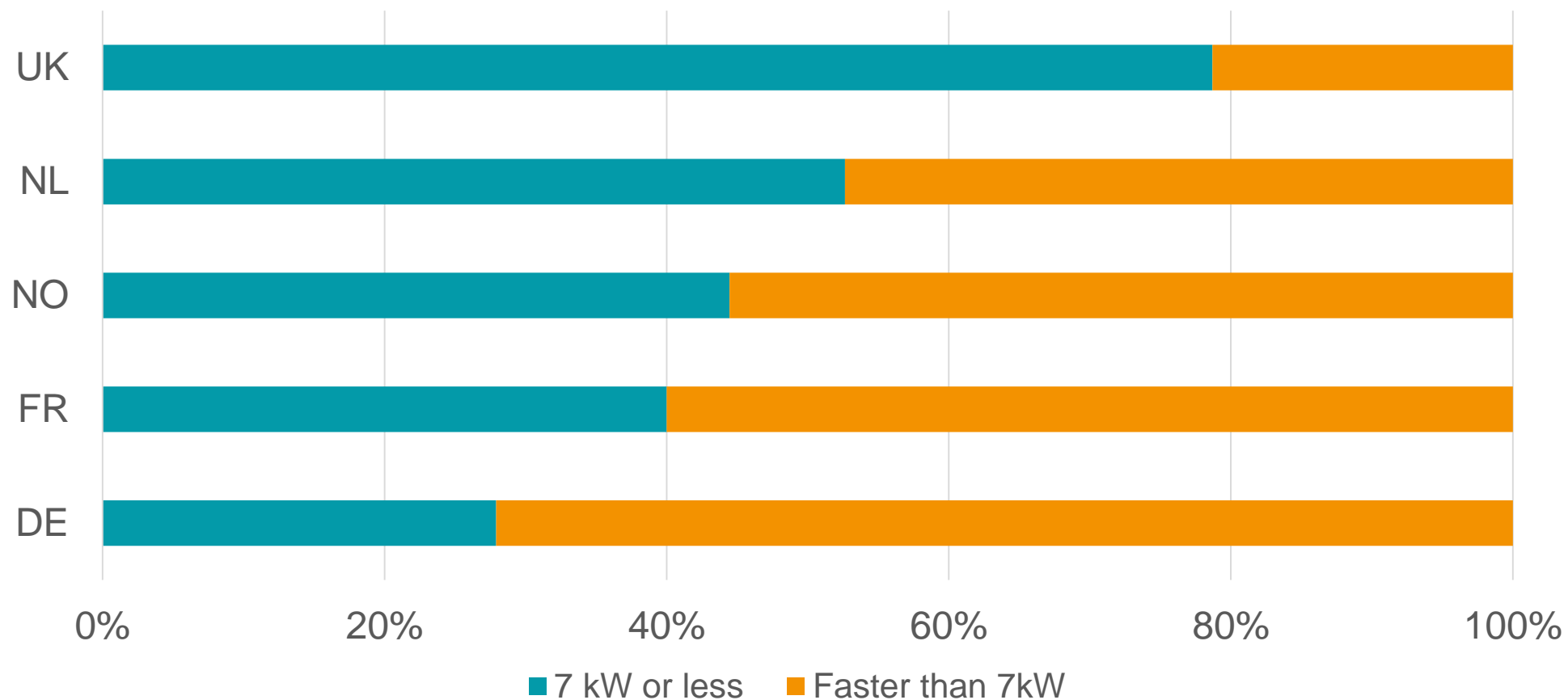
How do you charge at home?



# UK chargepoints are most likely to be limited to 7kW

Variation across countries, due to numerous reasons

What is the maximum speed of your chargepoint?





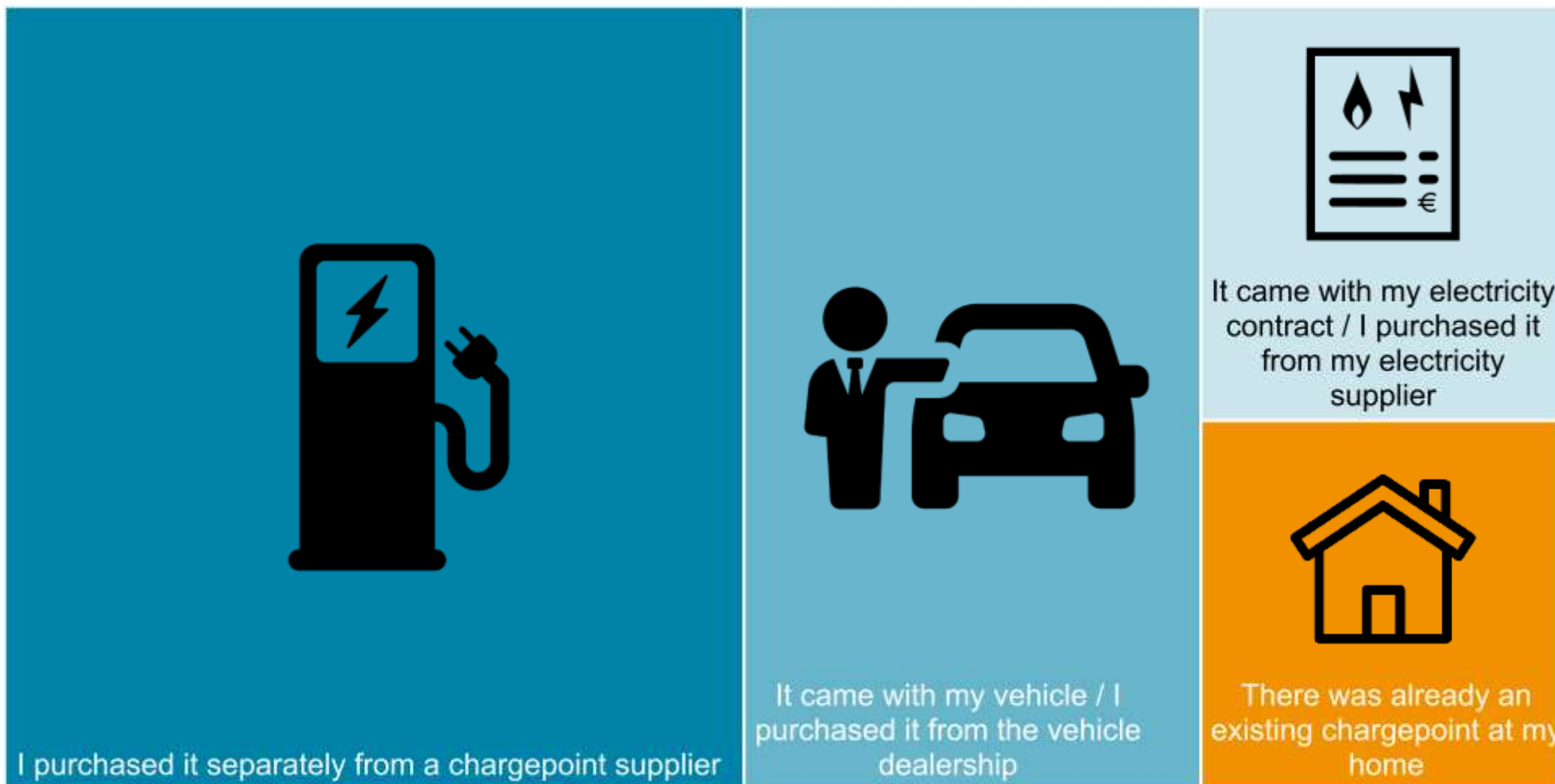
# A wide variety of chargepoint brands across the UK

International and homegrown brands share the market



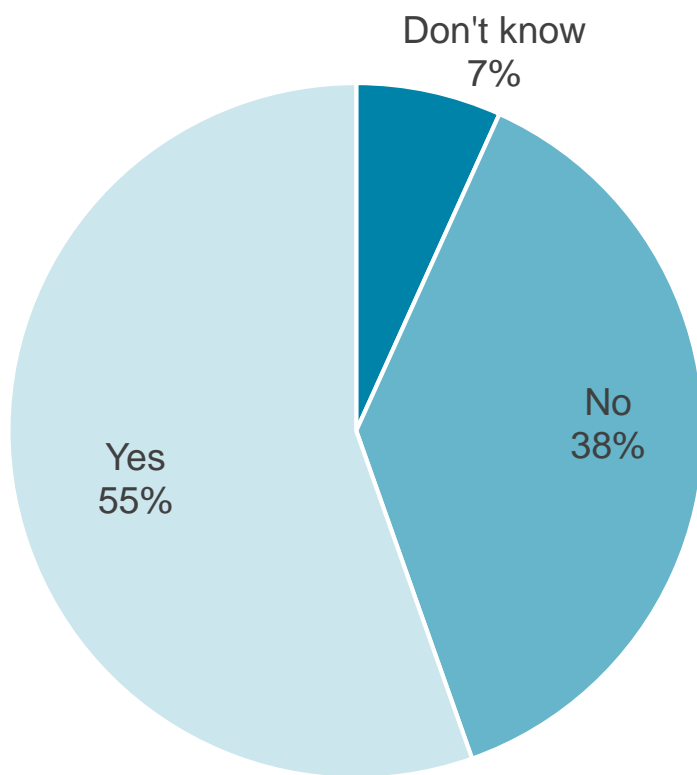
# Most buy their chargepoints direct from a supplier

## Referral or direct channels dominate UK sales volumes

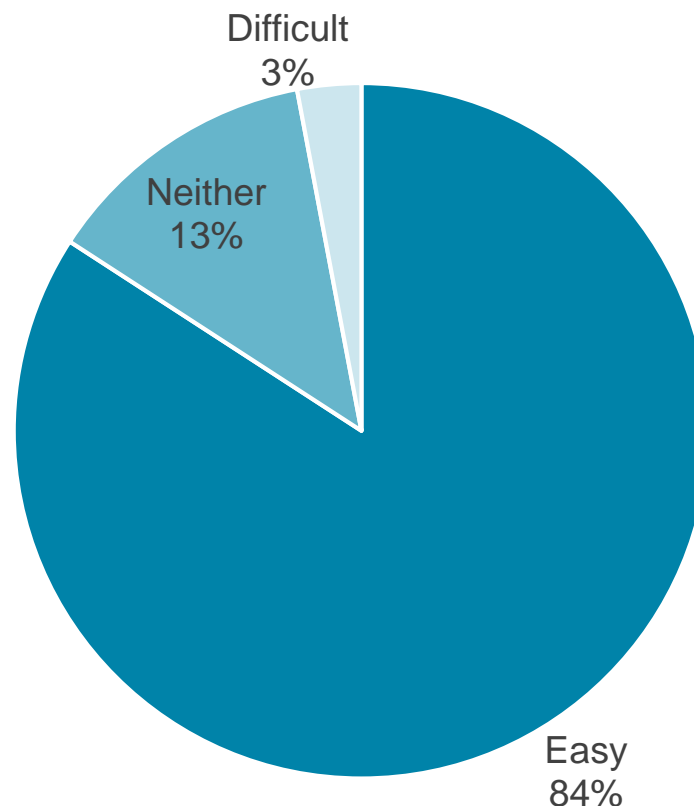


# The UK public could be ready for smart charging

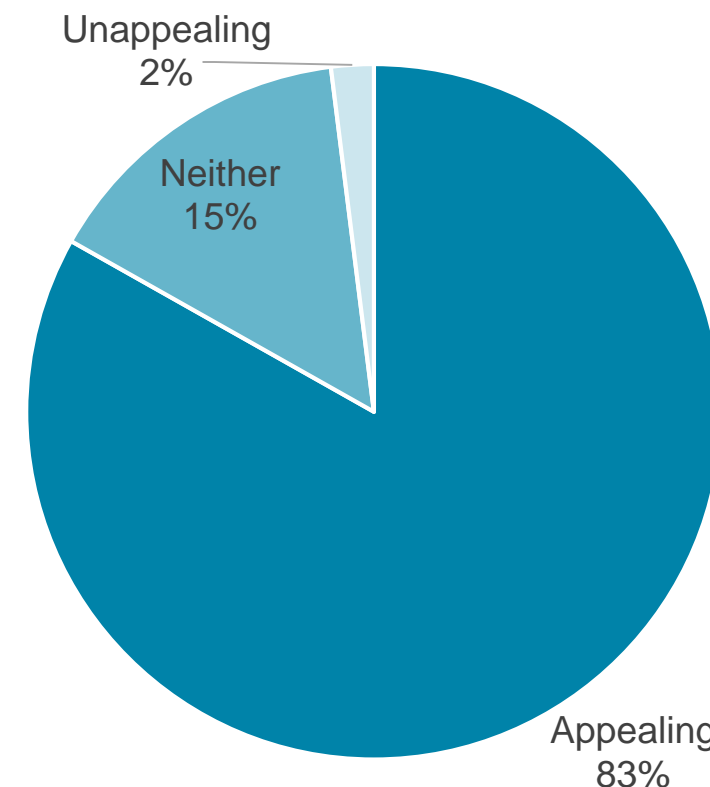
## Acceptance and interest but low awareness of solutions



Is your chargepoint internet-connected?



Is it easy or difficult to understand smart charging?

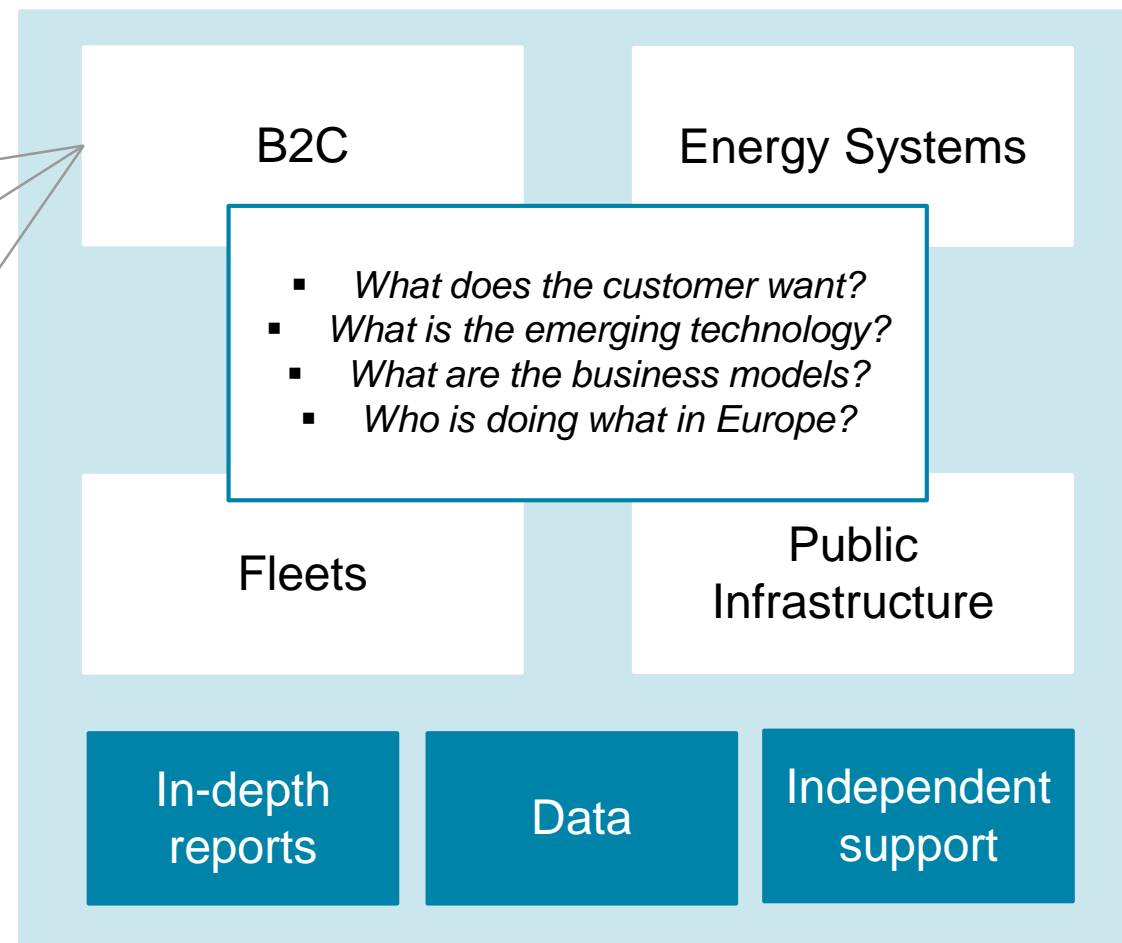
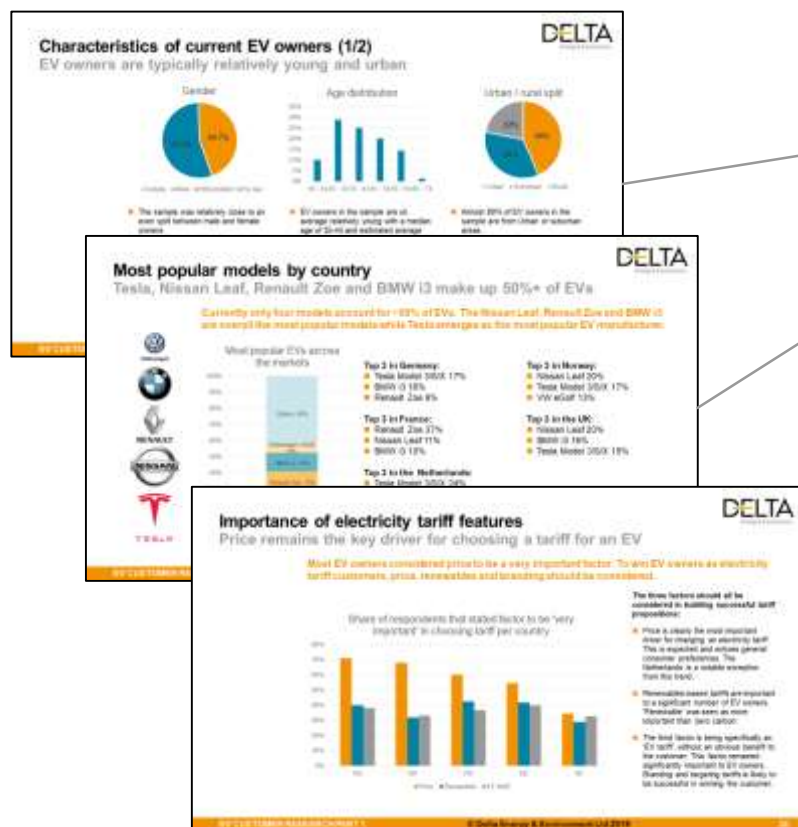


Is the concept of smart charging appealing or unappealing?

# Excerpts from the EVs & Electricity Research Service

## Delta-ee's EVs & Electricity Research Service

## Delta-ee's EVs & Electricity Research Service



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