

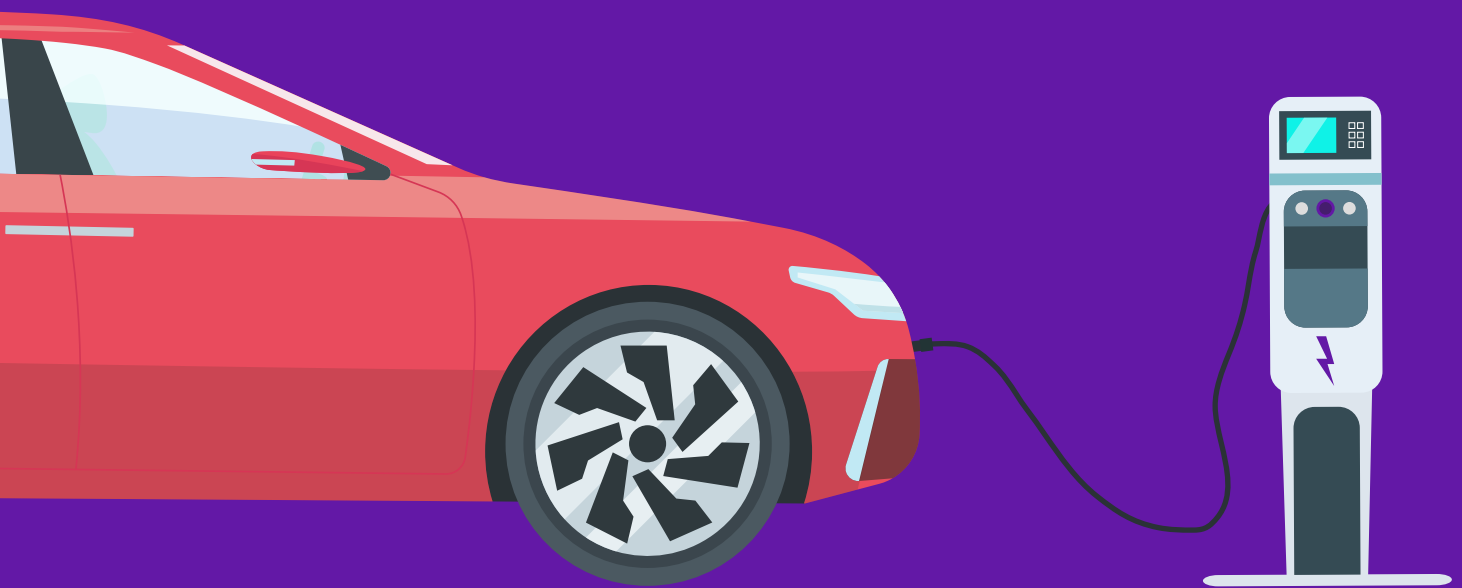


Electric Vehicles Consumer Research

Consumer survey and interviews
with consumers and stakeholders
summary of findings



April 2024
[consumer council.org.uk](https://www.consumer council.org.uk)



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1. Introduction and methodology

The Consumer Council as a non-departmental public body (NDPB) has a statutory duty to promote and safeguard the interests of consumers in Northern Ireland.

The Electric Vehicle Infrastructure Action Plan 2022 by the Department for Infrastructure (DfI) Electric Vehicle Infrastructure Task-Force includes a consumer priorities action. The Consumer Council has responsibility for this action to conduct consumer research considering public electric vehicle charging infrastructure.

In September 2023, the Consumer Council commissioned market research company Cognisense to undertake consumer research about electric vehicles with a focus on the electric vehicle public charging infrastructure.

The research consisted of an online survey of 589 electric vehicle drivers, five interviews with electric vehicle drivers, three interviews with representatives of disability organisations, four interviews with stakeholders (charge point operators and Electric Vehicle Association Northern Ireland); and an online survey of 148 consumers likely to consider switching to an electric vehicle in the next 12 months. The detailed methodology is contained in the full research report.



2. Overall summary of findings

89% of electric vehicle drivers felt they would benefit from a charge point operator code of practice, with commitments relating to reliability, location, payment, pricing, accessibility and safety being the most important.

People with disabilities welcome a code of practice for charge point operators, provided it included their needs based on consultation with disabilities advocacy groups at the development stage.

Stakeholders have mixed views but mostly agreed that the challenges facing charge point operators need to be understood if they are to be encouraged to cooperate in the development of a voluntary code of practice.

Most electric vehicle drivers felt that there is a role for an independent body to escalate a customer service-related complaint. Some stakeholders were in favour, some unsure about the potential effectiveness of such a body, and others unconvinced by its relevance.

Those considering buying an electric vehicle said they would like more information about public charging, battery life, running costs and home charging. They thought information should be provided by government, car manufacturers and car dealerships. Concerns included the range of electric cars, finding a working/available public charge point, the cost of installing a home charge point, larger electricity bills and the sale price of electric vehicles compared to petrol or diesel vehicles.

Stakeholders emphasised that education regarding the fundamentals of owning an electric vehicle is required urgently.

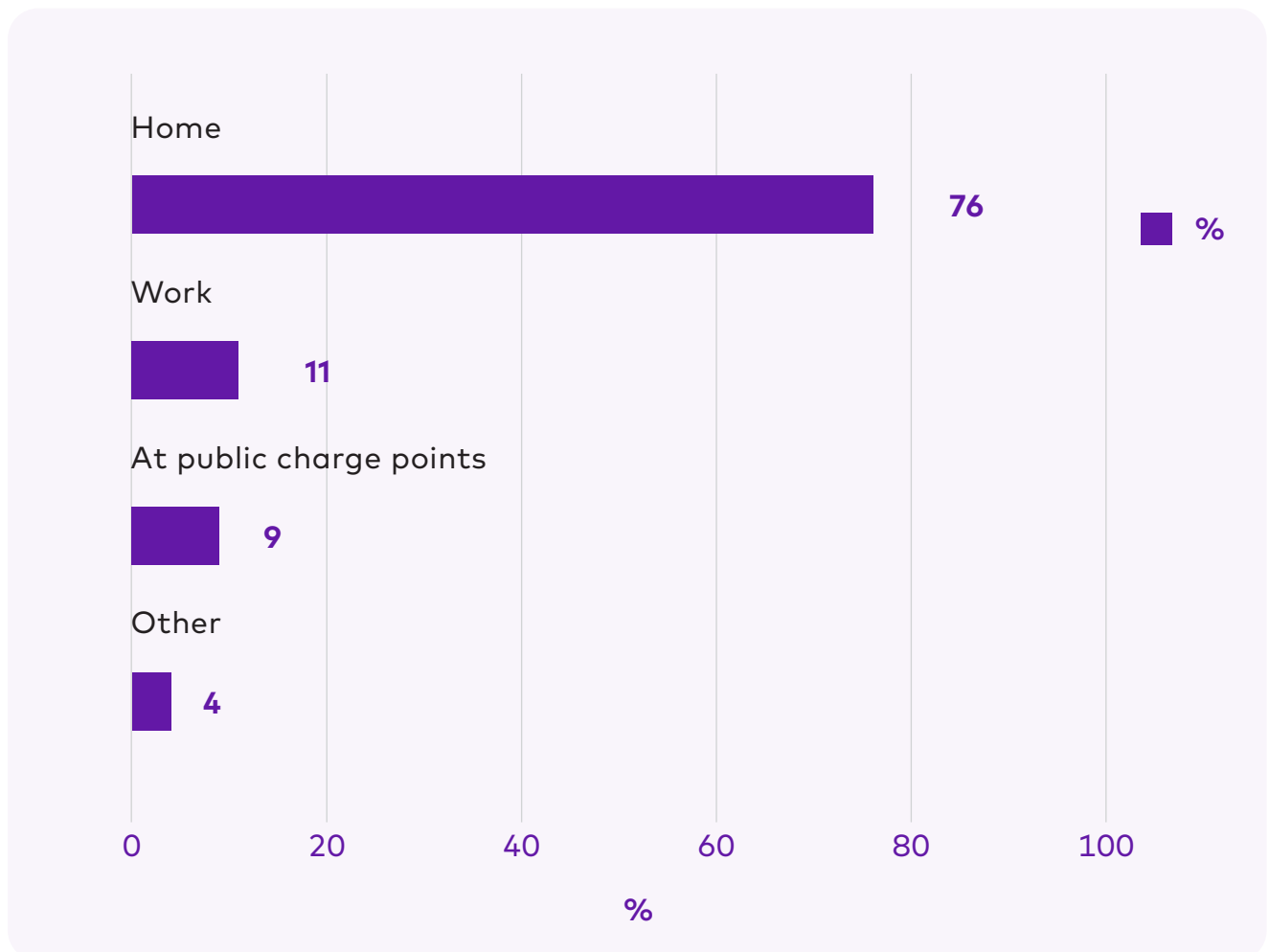
3. Survey of electric vehicle drivers

Charging their electric vehicle

84% had access to a charge point at home and charging at home was the most popular charging location (76%).

Figure 1: Where electric vehicle is charged mainly

Base: all electric vehicle drivers (n=589)



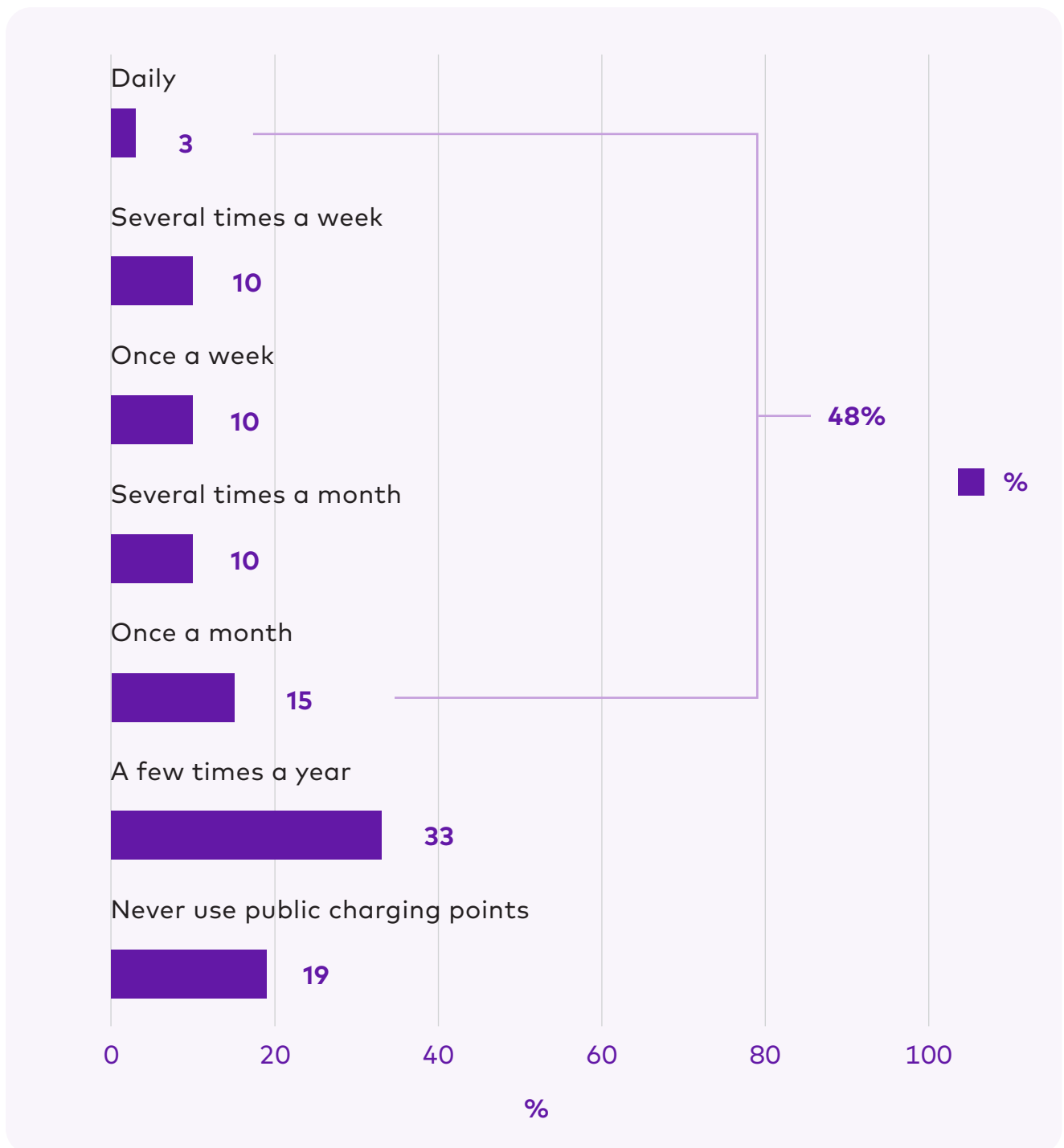
Public charge points

48%

used a public charge point at least once a month, a third a few times a year and nearly a fifth never used one.

Figure 2: Frequency of using a public charge point

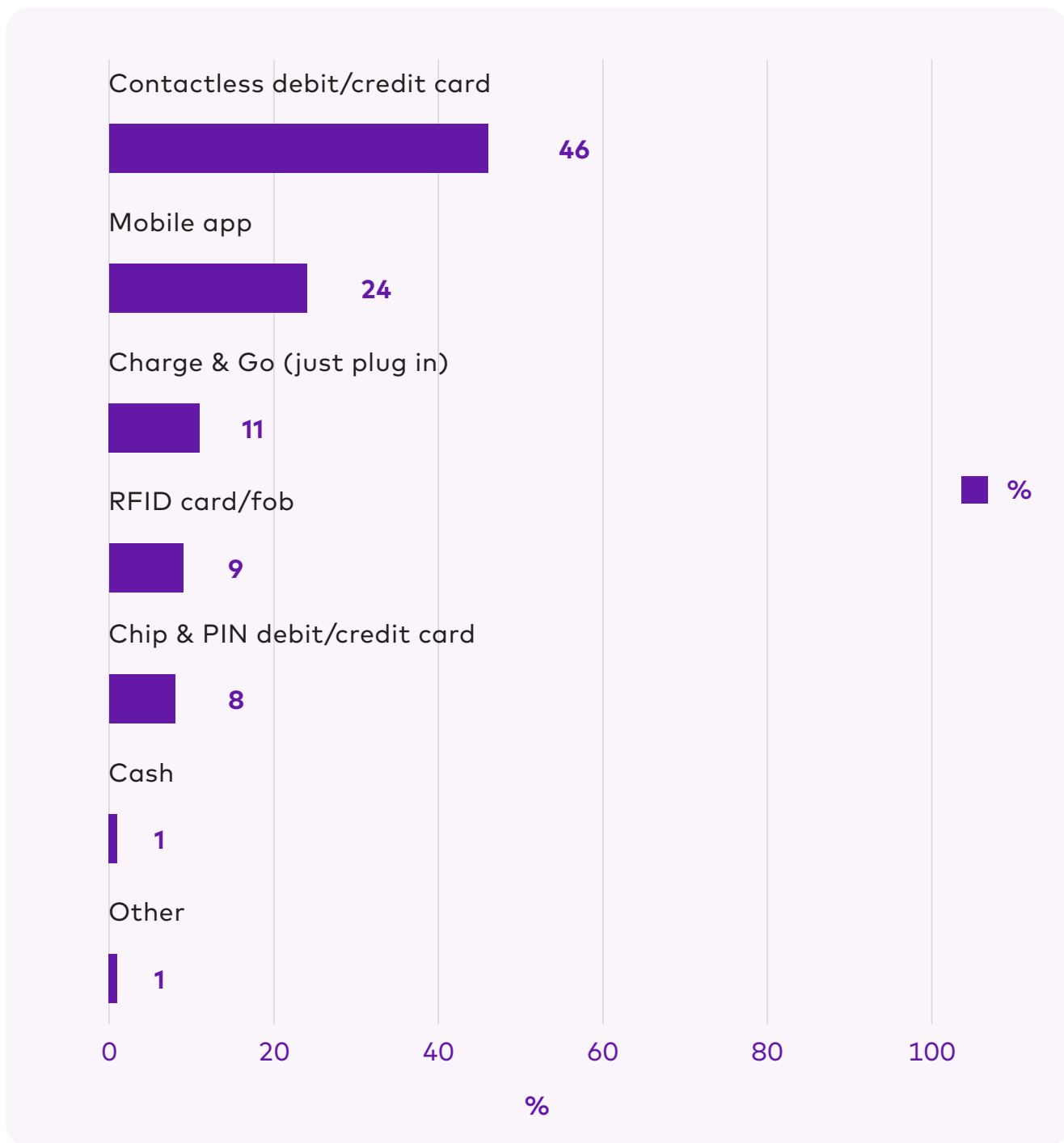
Base: all electric vehicle drivers (n=589)



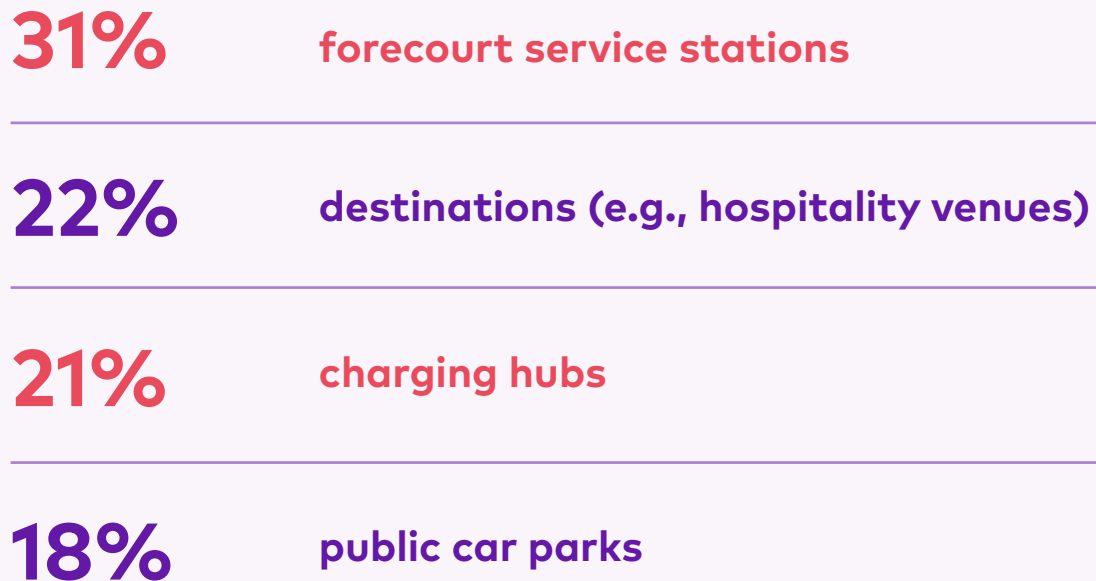
Contactless debit/credit card was the most preferred method to pay for public charging (46%) followed by mobile app (24%).

Figure 3: Preferred method of paying for public charging

Base: electric vehicle drivers who use public charge points (n=475)



Location preferences were for public charging points at:



In terms of geographical provision electric vehicle drivers agreed it was important to locate public charge points in:



Code of practice for charge point operators

89%

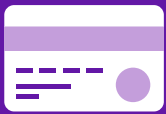
felt they would benefit from charge point operators having a code of practice.



Most believed it would be important for a code of practice to contain a commitment to:

90%

a charge point operator's network being, on average, reliable 99% of the time.



85%

offering a range of payment options, including Chip & Pin and contactless.

83%

clearly displaying pricing in pence per kilowatt hour at the charge point.

77%

making charge points easy to find.



76%

having mechanisms in place to avoid blocking.



75%

providing up-to-date information on location online.

73%

providing information on how to use the charge point at the site itself.

providing measures to ensure personal safety
- a higher proportion of females (76%) felt this way.

65%

54%

providing accessibility features for those with a disability or reduced mobility
- a higher proportion of those with a disability (68%) believed this to be important.



Attitudes towards public charge points:

99%

of electric vehicle drivers feel that paying for public charging should be as easy as paying for petrol or diesel at a petrol station.

94%

agreed that public charge points need to be more easily identified like the current forecourt/motorway petrol signs.

92%

agreed that charge point operators should be required to make their pricing available to an independent organisation to display online.

86%

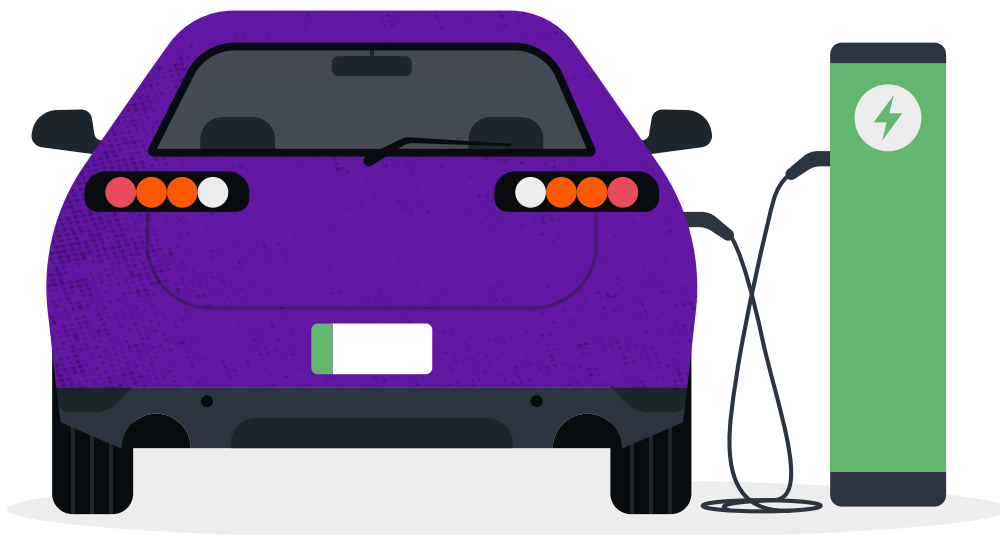
were supportive that there should be a single app that can be used at all public charge points.

85%

agreed that it should not be a requirement to sign up to an app or open an account with a charge point operator to use a public charge point.

82%

agreed that having to use a pre-pay account or upload credit in advance to use a charge point is frustrating.



49%

did not always feel safe at public charge points – a figure higher amongst females (62%).

Complaints to charge point operators

16%

had made a complaint to a charge point operator.

17%

had not complained as they felt the complaints process was not clear.

82%

agreed that there is a role for an independent complaint handling body to escalate a customer service-related complaint to regarding electric vehicle public charging infrastructure.



4. Interviews with electric vehicle drivers

Those with experience of using the public charging infrastructure had encountered the following problems when doing so:

a lack of available charge points, particularly of the rapid variety

outdated charge points



challenges in locating charge points

insufficient charge points in rural areas



charge points not functioning

blockage by internal combustion engine vehicles

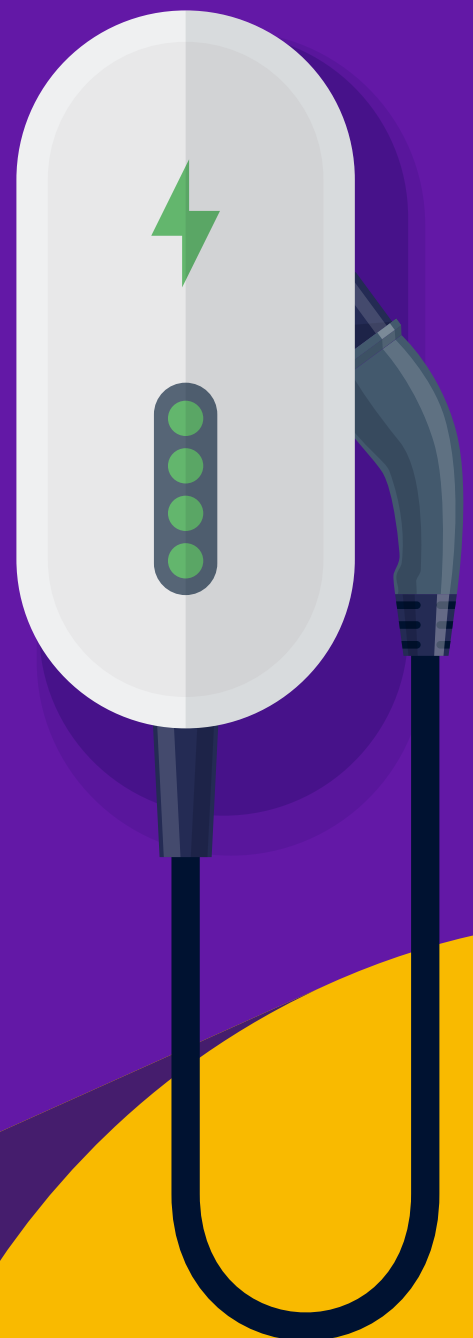
electric vehicles overstaying at charge points



difficulty understanding pricing

concerns regarding personal safety at charge points

Most were in favour of an independent body to whom complaints could be escalated and most supported the idea of a code of practice for charge point operators.



5. Interviews regarding disability considerations

People with disabilities would welcome a code of practice for charge point operators provided it included their needs based on consultation with disabilities advocacy groups at the development stage. They agreed that a code of practice should include commitments to:

lowering/removal of kerbs at charge points

ensuring charge points contain adequate space for manoeuvring a wheelchair

locating charge points close to amenities to allow the opportunity to seek assistance from others, if necessary

providing lighter high-speed charging cables, making them easier to lift

weatherproofing charge points to provide protection from the elements during the process of connecting to a charge point which may take longer for those with a disability



6. Interviews with stakeholders

Stakeholder views were mixed regarding a code of practice for charge point operators. Some would welcome it and some were unsure about the value it would offer. Others would be in favour but not at the expense of charge point roll-out or investment.

Most agreed that a code of practice for charge point operators should contain commitments relating to reliability, payment methods, pricing, accessibility, and safety. In addition, those involved in producing a code of practice should work closely with charge point operators to develop it to ensure feasibility.

Stakeholders emphasised that education regarding the fundamentals of owning an electric vehicle is required urgently.



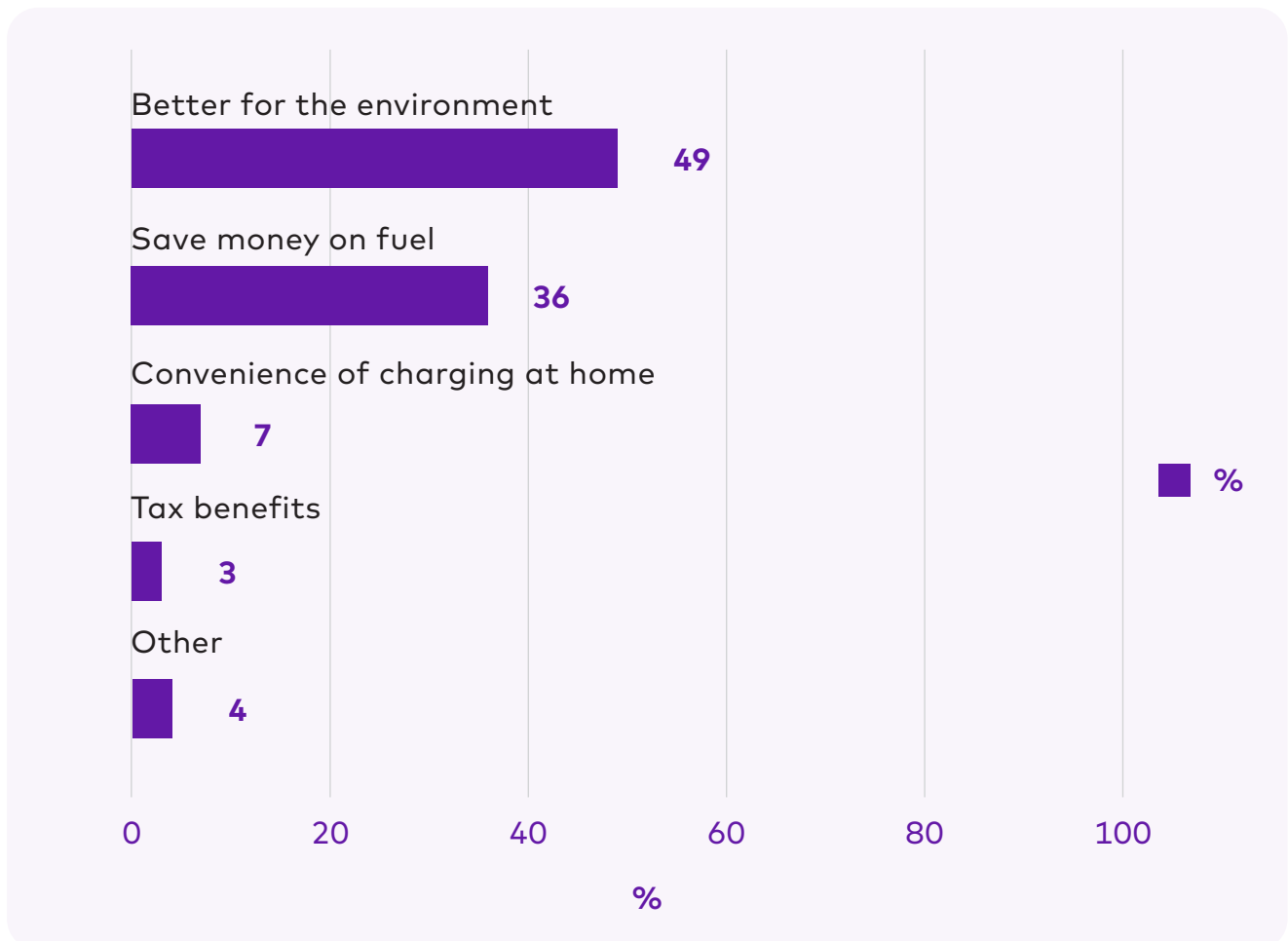
7. Survey of electric vehicle considerers

49%

of those considering switching from a petrol or diesel vehicle to electric stated being better for the environment as their main reason, followed by 36% stating saving money on fuel.

Figure 4: Main reason for intending to switch to an electric vehicle

Base: all likely to consider swapping to an electric vehicle in the next 12 months (n=148)



56%

of considerers agreed that it has been easy to find information about electric vehicles whilst 19% disagreed.

Considerers would particularly value more information about:

57% public charging

55% battery life

53% running costs

47% home charging

Sources considerers felt should provide information about electric vehicles include:

60% government

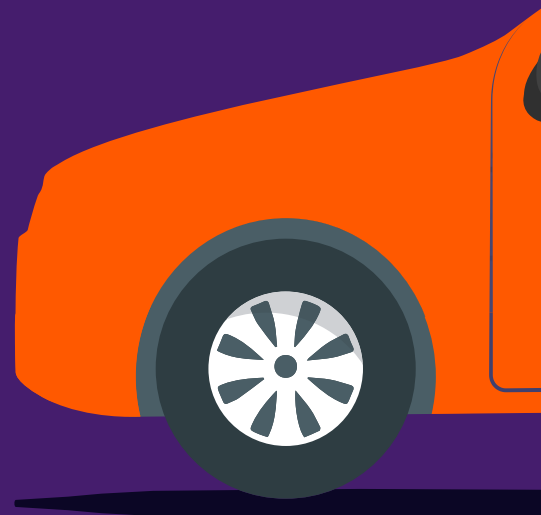
55% car manufacturers

54% car dealerships

Concerns for those considering purchase of an electric vehicle included the range of electric cars (61%), finding a working/available public charge point (55%), the cost of installing a home charge point (46%), larger electricity bills (46%) and the sale price of electric vehicles compared to petrol or diesel vehicles (46%).

8. Conclusion

This research shows that amongst electric vehicle drivers there is support for a code of practice for charge point operators. Commitments relating to reliability, location, payment, pricing, accessibility and safety were considered to be most important. It will be necessary to include those with disabilities/advocacy groups and stakeholders such as charge point operators in developing a code of practice. There is also an urgent need to provide information about the fundamentals of owning an electric vehicle.







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