

Charging Payment Study 2024

Authorization and Payment at public Charging Stations



Press-Handout
23/01/25

USCALE GmbH
www.uscale.digital

Key Results

1

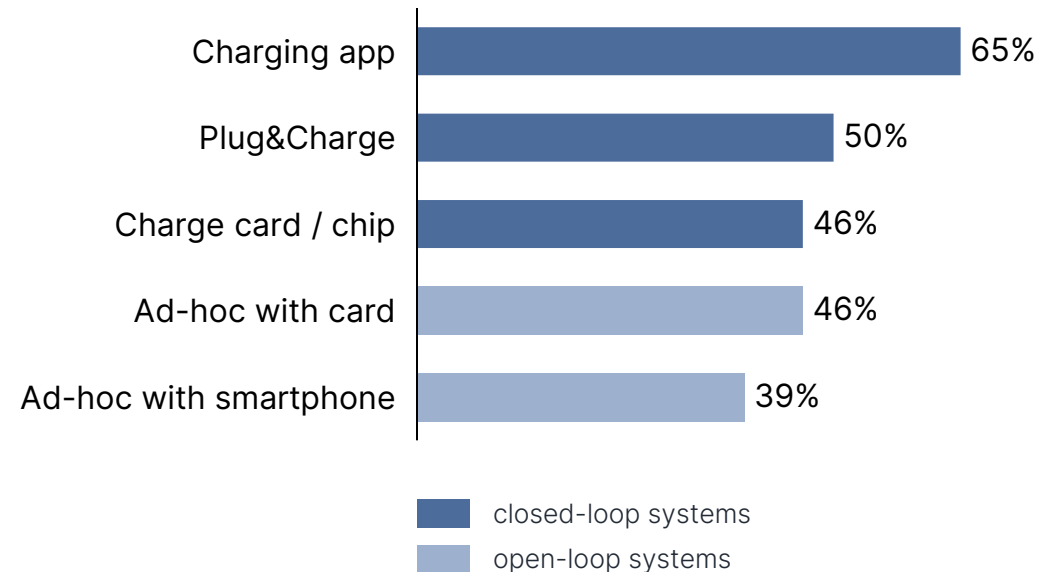
Ad hoc methods with high relevance once AFIR has been put in place

Most used payment method for all 6 European markets surveyed is the charging app with a means of payment that must be added to the app.

Ad-hoc methods are still on rank 4 and 5 but take a strong role in the payment market after the AFIR regulation has been introduced.

EUROPE:

Usage behavior regards different payment methods
(Share of those who use it always or frequently)



„How do you usually pay at publicly accessible charging stations?“
(Multiple answer possible)

Key Results

2

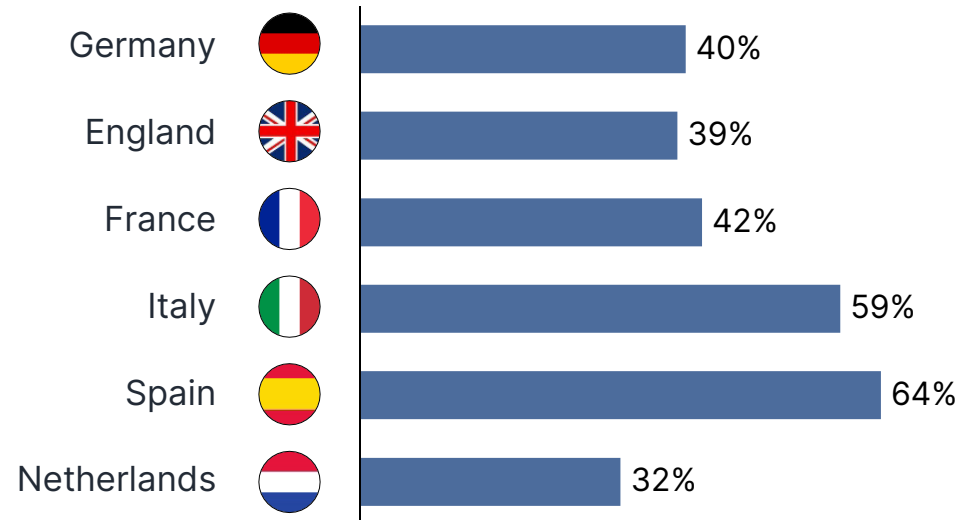
Significant differences between markets

Markets have different preferences. An impressive example is the use of credit and debit cards at the charging station. While the Dutch don't often use cards for ad-hoc payments, Italian and Spanish EV drivers use cards frequently.

There are also major differences between markets when it comes to other payment methods.

EUROPE:

Ad-hoc Payment with Credit Card
(Share of those who use it always or frequently)



„How do you usually pay at publicly accessible charging stations?“

(Multiple answer possible)

Key Results

3

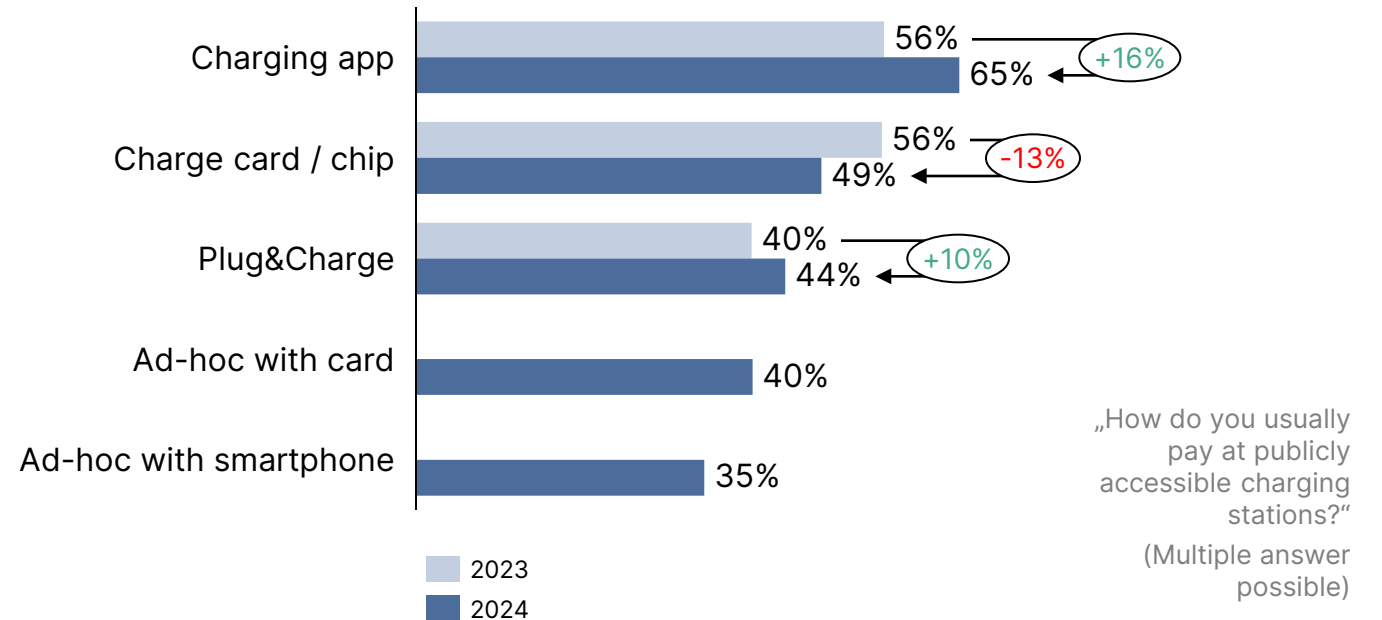
Charging app as the most used payment method in Germany

In Germany, the charging app continues to dominate the market and is even used more frequently in Germany.

The relevance of the charging card has decreased.

GERMANY:

Usage behavior regards different payment methods
(Share of those who use it always or frequently)



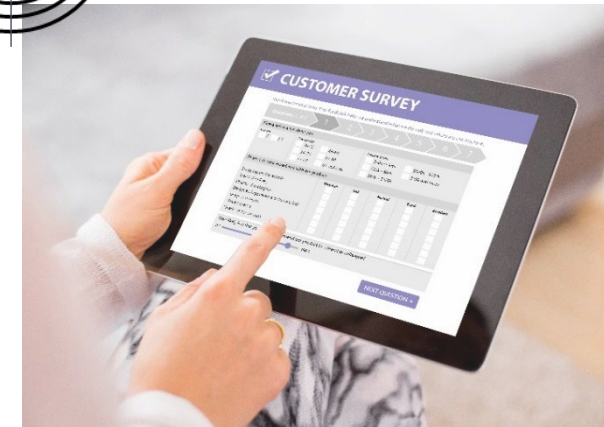
Target Group

Survey:

- Target Group: BEV Owners (no PHEV) that charge at least occasionally at public charging stations
- Survey: Online-Survey (CAWI)
- Market: Germany, UK, France, Italy, Spain, Netherlands
- Recruiting: Access Panel
- Lenth of Interview: 15-20 min
- Field phase: August-November 2024

Sample sizes:

- Germany: N = 950
- United Kingdom: N = 516
- France: N = 501
- Italy: N = 501
- Spain: N = 501
- Netherlands: N = 514



Objective of the Study

Initial situation:

- With the European AFIR directive, which came into force in 2024, public charging points must be equipped with ad-hoc authorisation and payment methods to a large extent.
- The new payment options influence the usage habits of EV drivers.

Questions:

- Which authorisation and payment options are preferred by EV drivers?
- What differences are relevant for different markets?
- What are the reasons for the usage behaviour of different payment options depending on the market?
- What is the expectation for the future?
- What can service providers do to influence the methods used and preferred?





SCALE YOUR USER
SCALE YOUR BUSINESS

Axel Sprenger

Managing Director
USCALE GmbH

mail axel.sprenger@uscale.digital
fon +49 172-1551 820
web www.uscale.digital
post Silberburgstrasse 112
70176 Stuttgart

