



2025 Global Automotive Consumer Study
Deep Dive: EV Charging in Germany

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Key findings



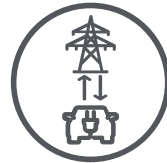
Vehicle **charging** and **range** remain **key issues** that hinder consumer acceptance of electric mobility.



A clear **preference for home charging** does not translate into widespread access to home chargers.



Consumers see **charging time** as the **top priority** in public infrastructure.



Vehicle-to-grid technology and its financial incentives help offset the **higher costs of electric mobility** and improve acceptance.



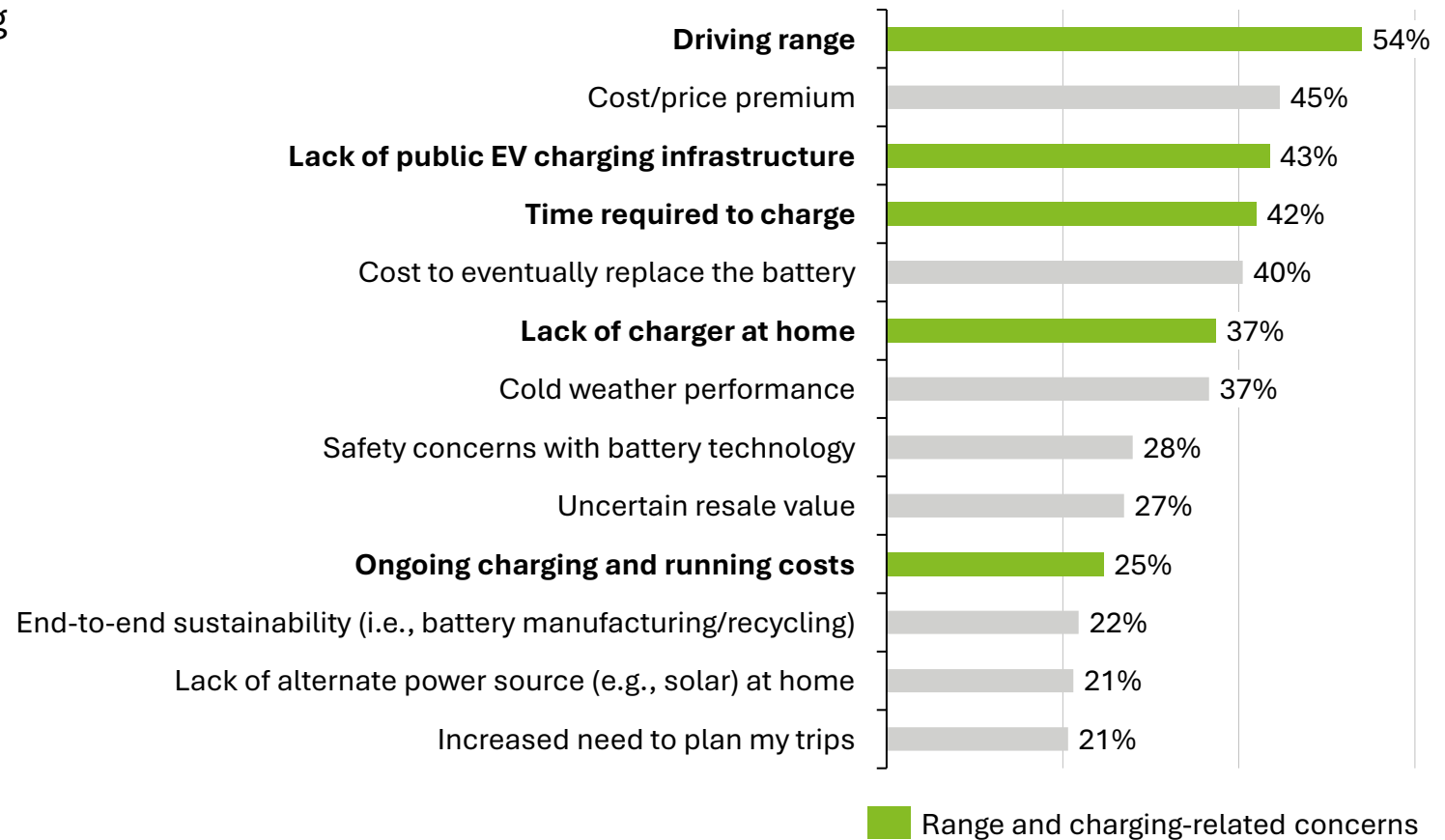
**The critical role
of EV charging for
consumers**



German consumers are very concerned about electric vehicle (EV) range and charging issues.

The lack of adequate infrastructure for both public and private charging coupled with the time required for charging must be addressed to encourage the uptake of EVs in Germany. Range anxiety is moreover top of mind when it comes to the advancement of battery technology.

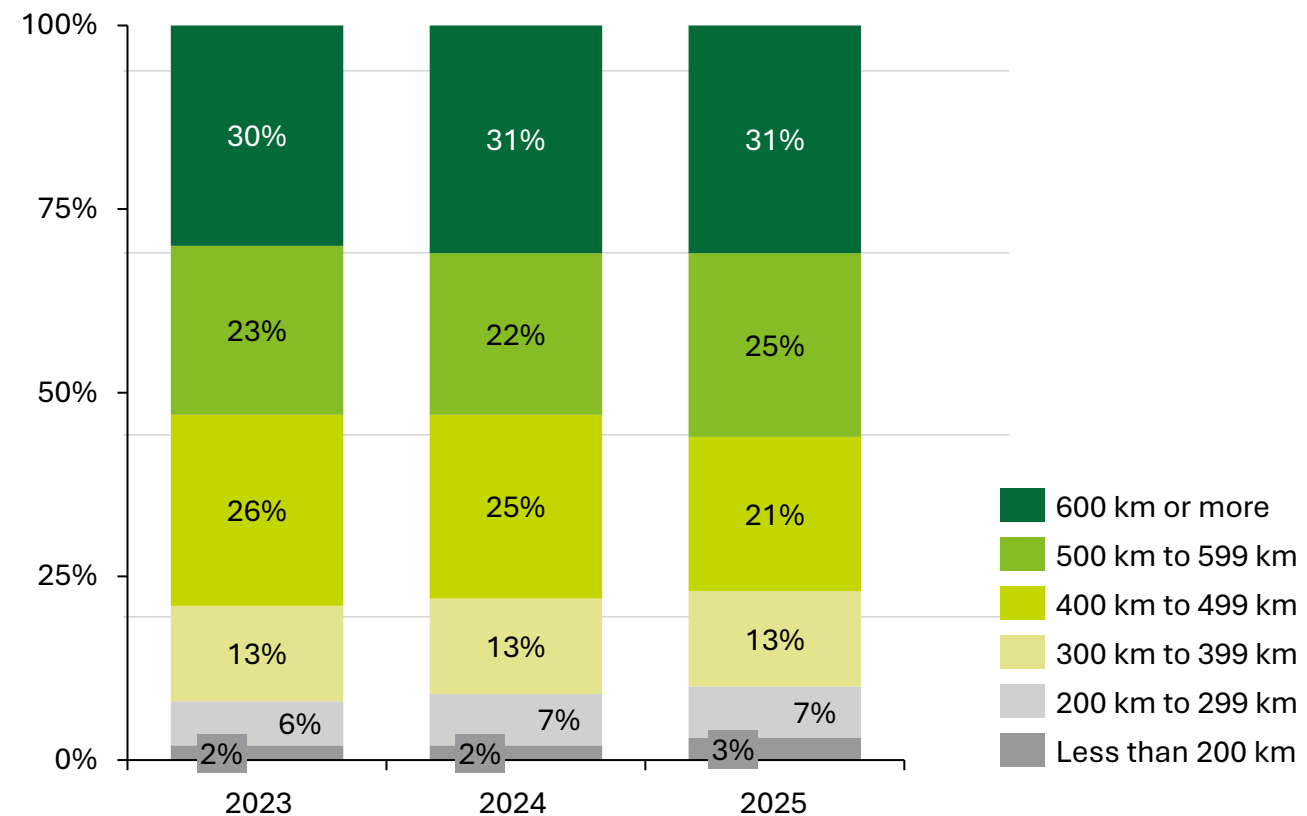
Fig. 1 – What are your biggest concerns about battery-powered EVs? (Please select all that apply.)



The longer the better: Range anxiety remains an issue

Around half of the consumers surveyed expect an EV range of at least 500 km. People are looking for vehicles that can cover longer distances for holidays or business trips, even if average daily driving distance remains much lower.

Fig. 2 – How far would a fully charged all-battery EV need to go for you to consider acquiring one?



* Values may differ from the [global report](#). For comparability reasons, the answer option "Would never consider acquiring a BEV" in 2025 was left out of this analysis.



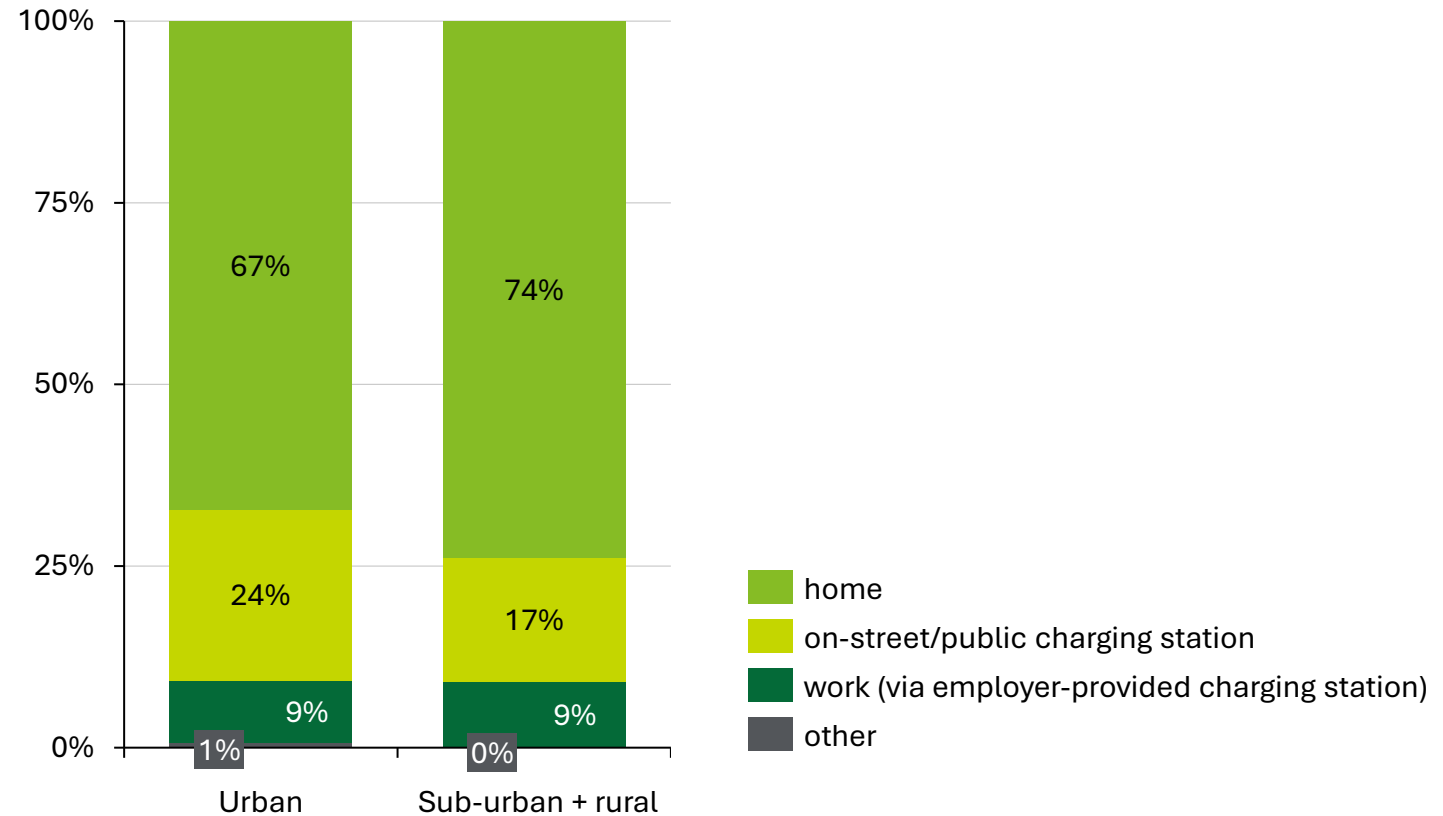
**Preference for
charging at home**



The vast majority of potential EV buyers prefer to charge at home.

Despite the higher density of public charging points in urban areas, there is only a slight preference for public charging compared to rural areas. More than two-thirds of consumers thus expect to charge their EVs at home, regardless of where they live.

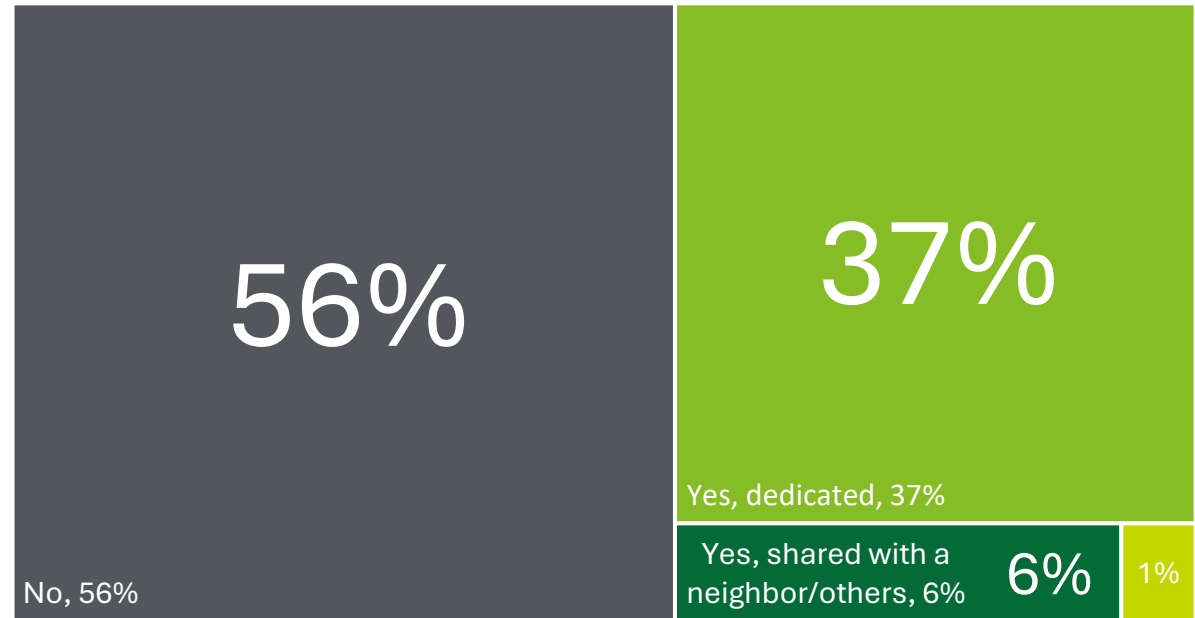
Fig. 3 – Where do you expect to charge your EV most often (by location)?



Access to home charging is a luxury few consumers in Germany enjoy.

Less than half of the survey participants indicated access to a dedicated or shared charger at home. As EV penetration improves, accessibility to charging points will become increasingly important for both private and public charging processes.

Fig. 4 – Do you have access to a charger at your residence?*



I don't know, 1%

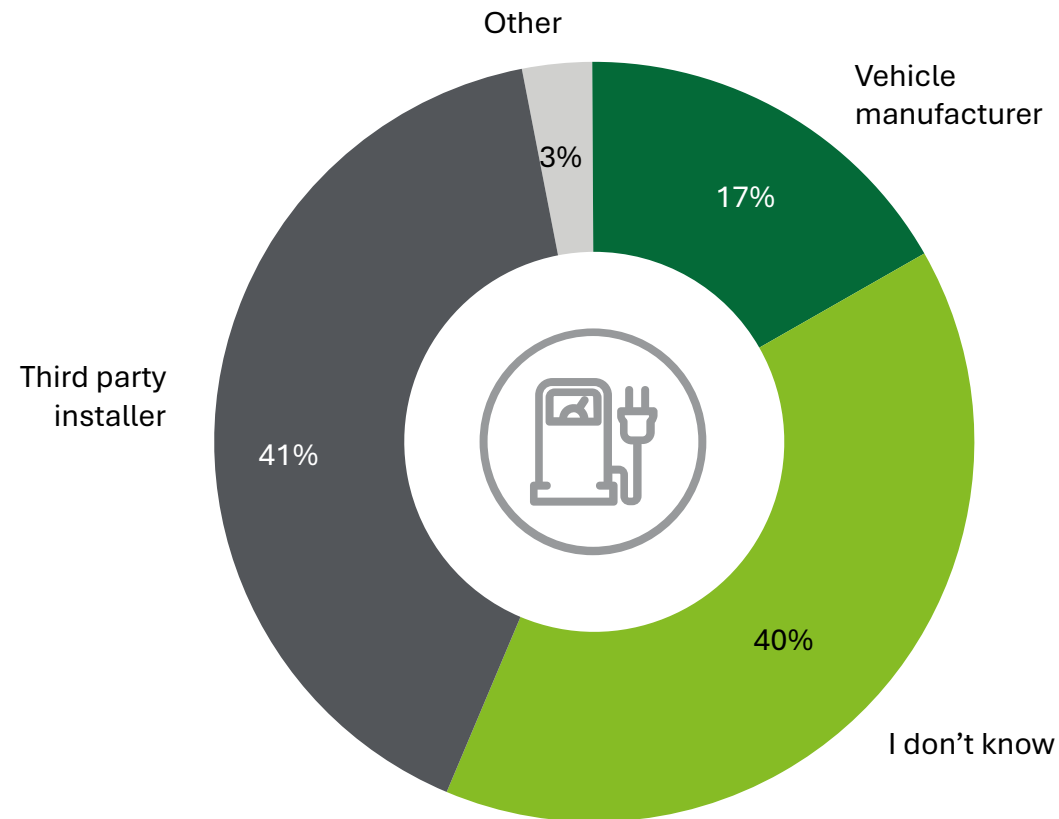
* only those who expect to primarily charge at home



A quarter of consumers are still unsure about where to buy a home charger.

The willingness to charge at home, coupled with poor access to chargers, means there is a growing market for these products that harbors great potential for both OEMs and third-party providers to establish themselves in this market and win over a still uncertain consumer base.

Fig. 5 – From whom do you plan to purchase a charger for your residence?*



* only those who expect to primarily charge at home and currently do not have access to a charger

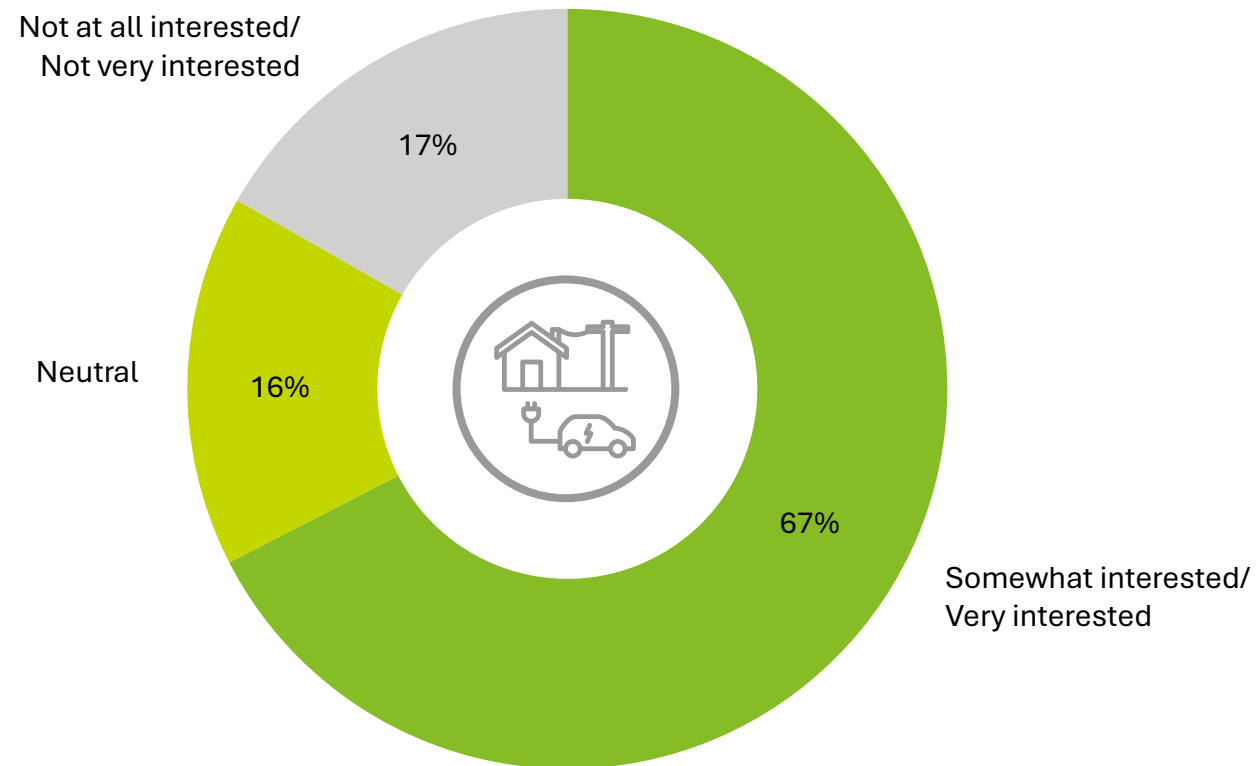


Vehicle-to-grid (V2G) is becoming increasingly popular as the technology matures and electricity costs remain high.

Two-thirds of future EV users are interested in returning excess energy from their vehicle to the electricity provider in exchange for monetary rewards. This additional source of income could spur the switch to EVs.

Moreover, V2G can be used as a backup power source in emergencies or to help balance the grid and further reduce electricity costs.

Fig. 6 – How interested would you be in returning excess energy from your vehicle to your electricity provider in exchange for monetary credit?*



* only those who expect to primarily charge at home

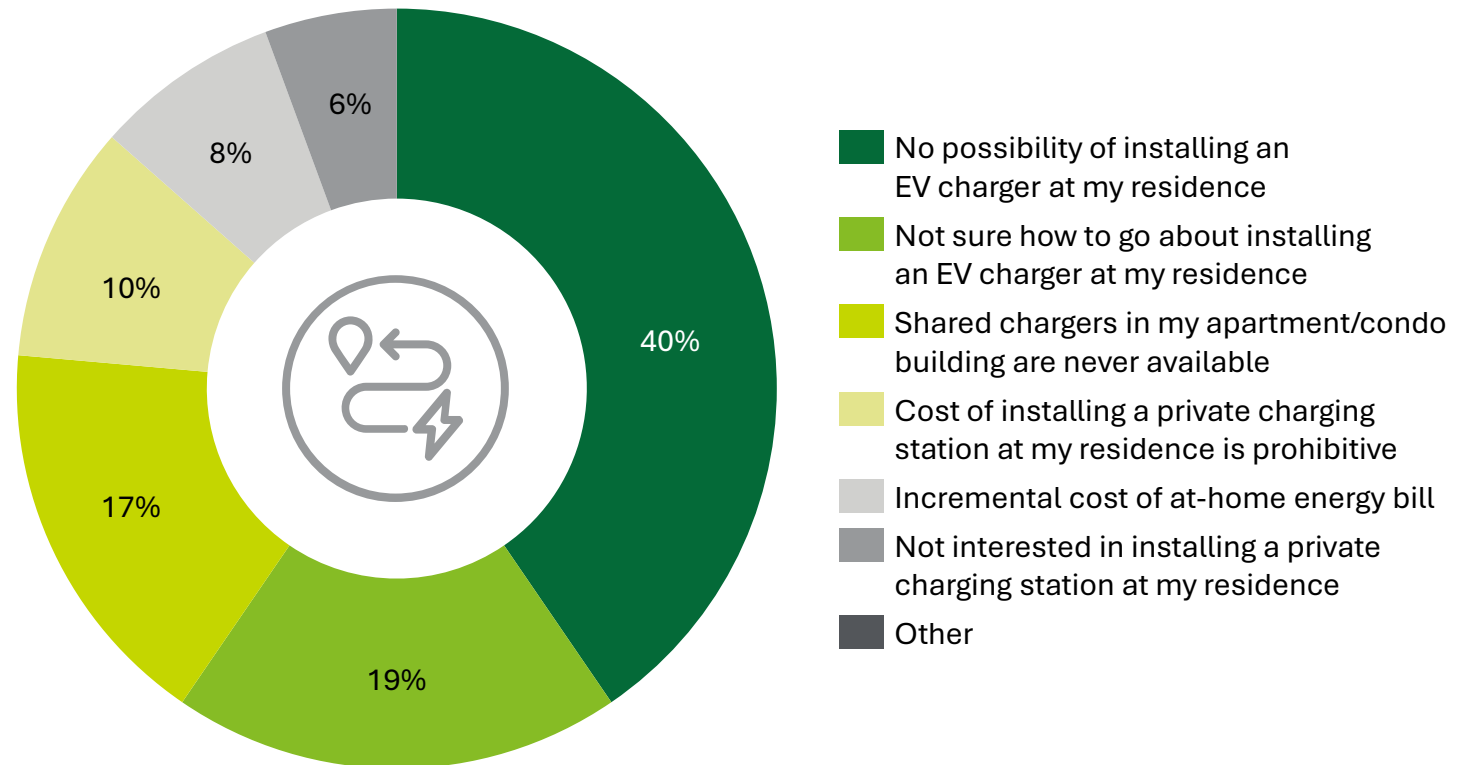


Consumers who do not charge their EV at home often do not have the option to do so.

There is a need to educate a poorly-informed consumer base concerned about the costs of charger installation and additional energy use.

Only 6% of consumers surveyed are not interested in installing a home charger at all. A sufficient public-charging infrastructure could increase this number.

Fig. 7 – Why do you not charge your EV at home?*



* only those who do not expect to charge primarily at home



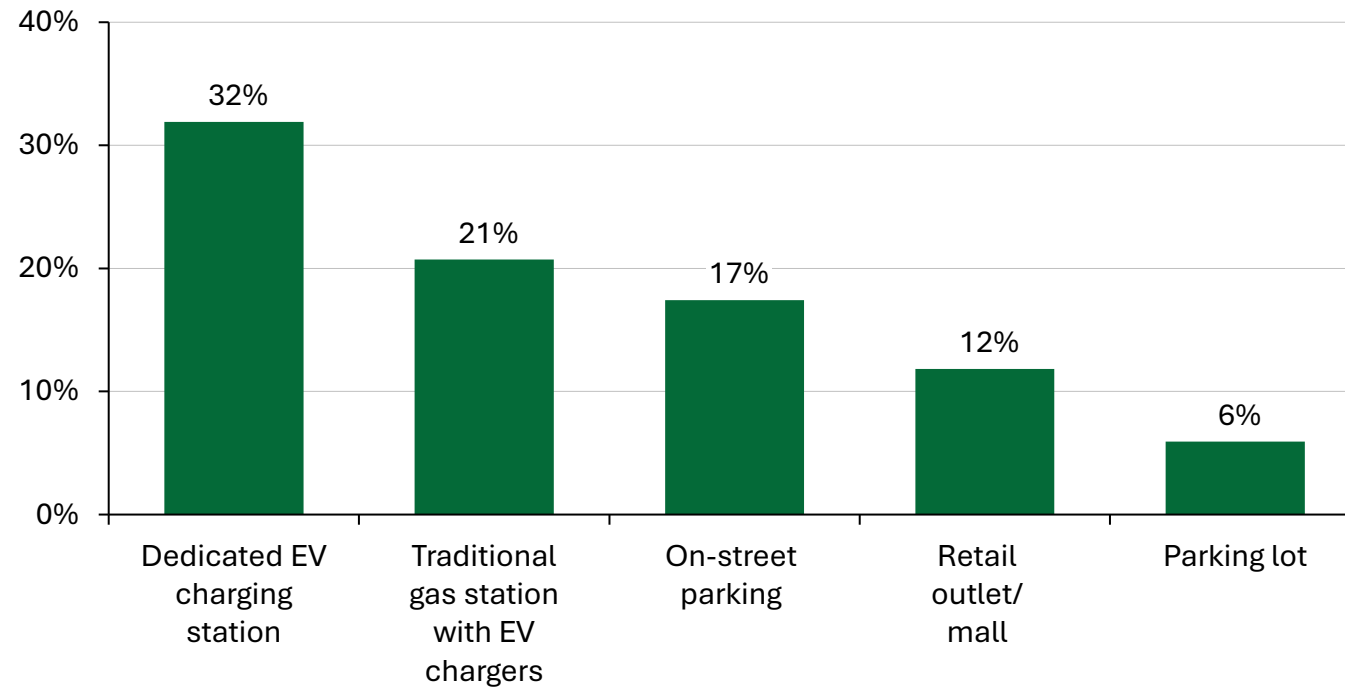
**Consumer
perspective on
public charging
infrastructure**



German consumers prefer a dedicated EV-charging infrastructure to charging at traditional gas stations.

A robust and accessible charging network is needed to support the growing adoption of electric vehicles in Germany. More dedicated charging points are needed along major motorways and in rural areas to make EVs attractive to the masses.

Fig. 8 – Where would you want to charge your EV when away from home?*
Top 5 answers



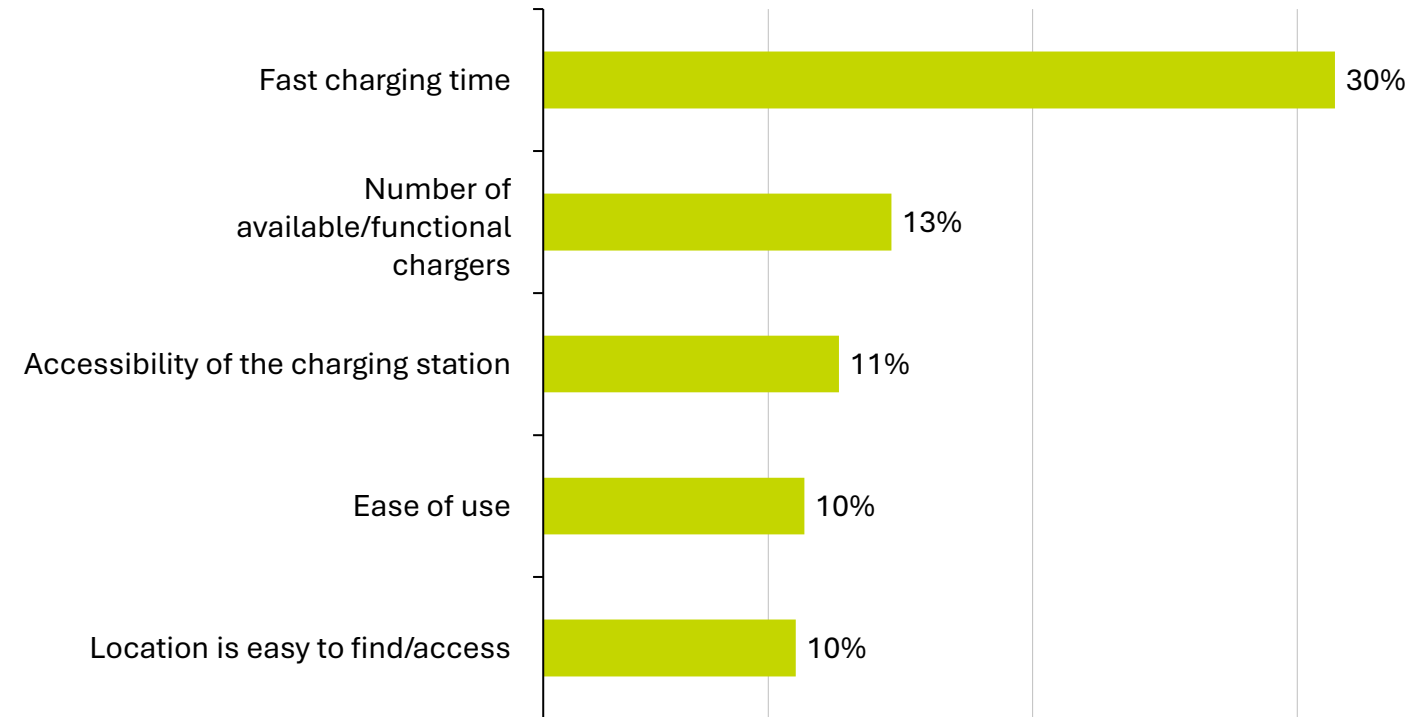
* only those who do not expect to charge primarily at home



Availability and accessibility are important, but fast charging is what really drives the public charging experience.

German EV buyers value the ability to charge their vehicle quickly when using a public charging station. Almost a third consider this the top priority, followed by the availability and accessibility of chargers. Not only infrastructure, but specifically fast charging infrastructure, require investment.

Fig. 9 – What is most important in the EV-charging experience?
Top 5 answers

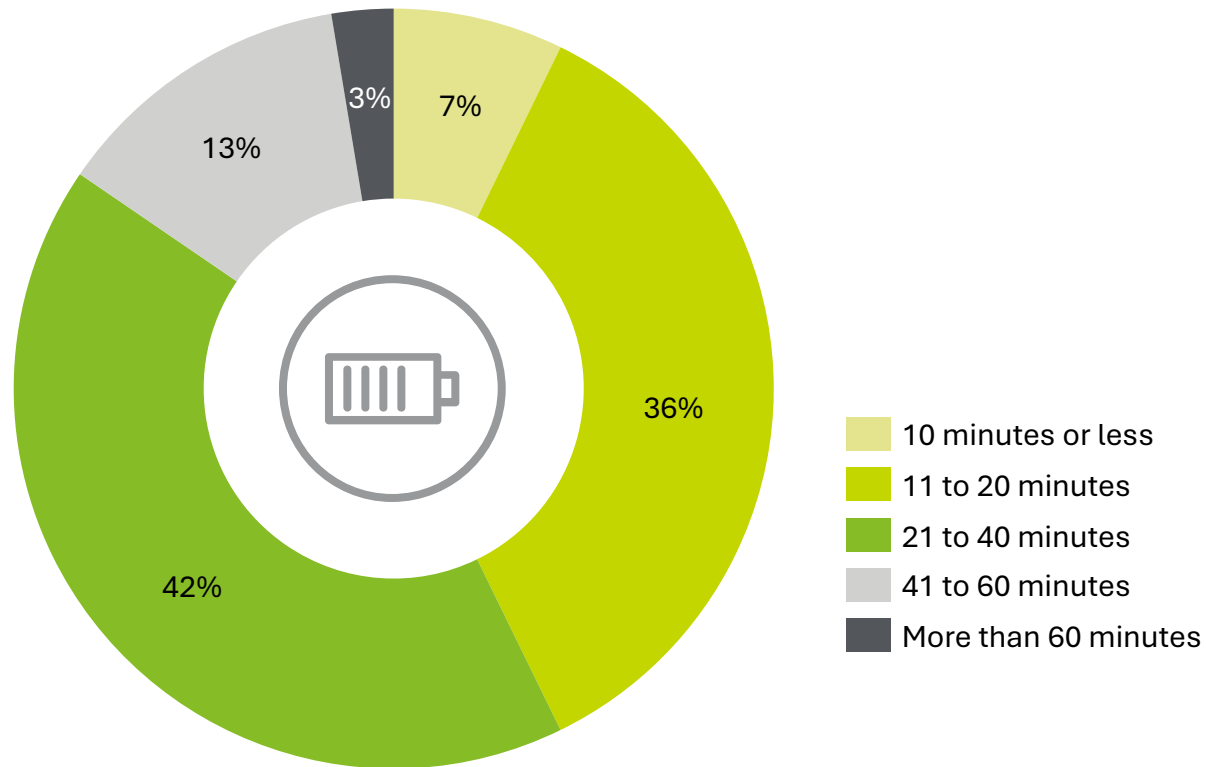


How fast is fast enough?

85% of consumers expect an EV to be 80% charged in less than 40 minutes.

The willingness to charge at home, coupled with poor access to chargers, means there is a growing market for these products that harbors great potential for both OEMs and third-party providers to establish themselves in this market and win over a still uncertain consumer base.

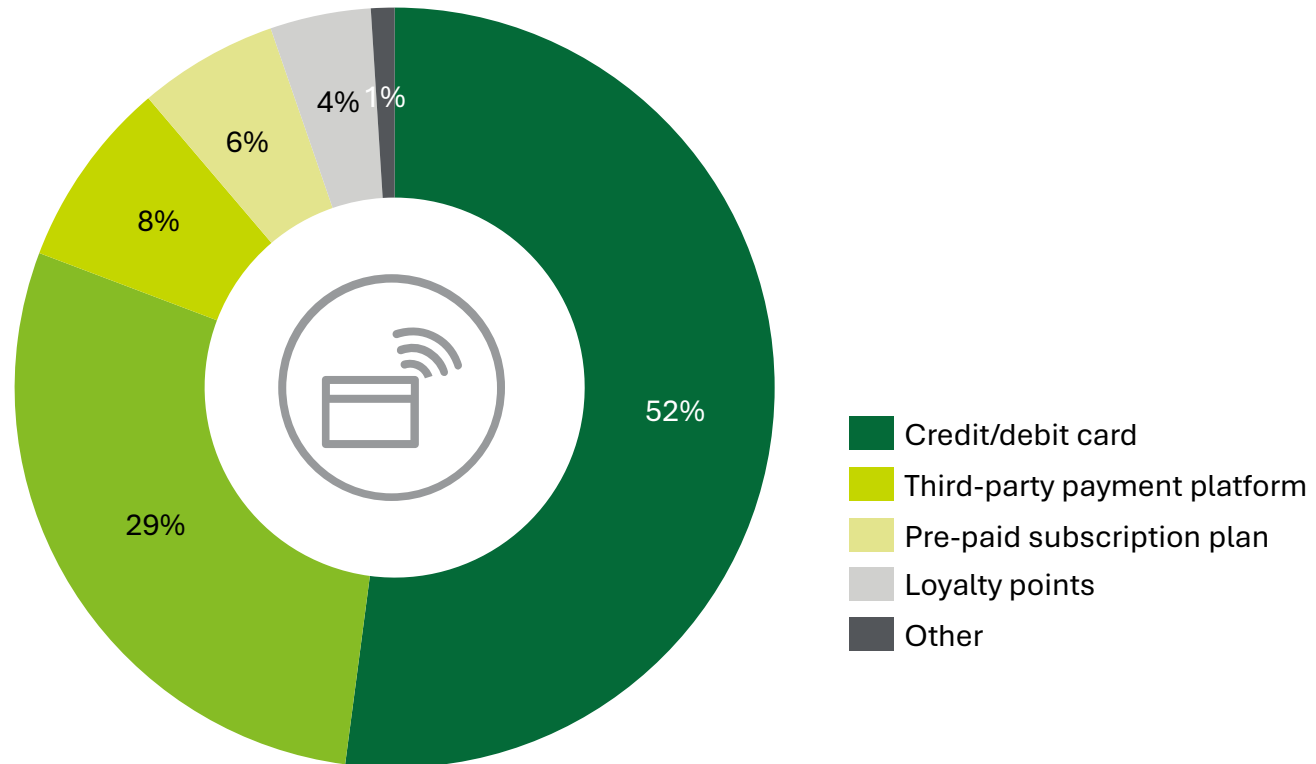
Fig.10 – How long do you think it should take to charge an EV from fully discharged to 80% charged at a public-charging location?



As to payment, just over half of consumers prefer to use their credit or debit card.

This data underlines the importance of prioritizing simple, familiar payment options such as credit/debit cards and app-based solutions. Payment providers should ensure seamless integration of these methods to enhance the user experience, while niche options can be offered for specific consumer groups.

Fig.11 – How would you prefer to pay for public EV charging?



Recommendations for companies



Recommendations



Prioritize fast charging infrastructure development

Fast charging infrastructure can help address some EV user concerns - range anxiety and charging time - by making long-distance travel more feasible and EVs more attractive.



Further integrate charging solutions with EV sales

Provide a seamless experience for consumers by offering bundled packages, simplifying the purchasing process, adding value for customers and fostering brand loyalty.



Position yourself in the market for residential charging solutions

Innovative and user-friendly home charging options, like smart chargers that integrate into home energy systems and allow users to reduce cost by optimizing charging times, make the charging experience as comfortable as possible.



Invest in a more attractive public charging experience

Enhance customer satisfaction and encourage repeat usage by improving the environment of the charging stations, the payment process, and wait times.



About the study

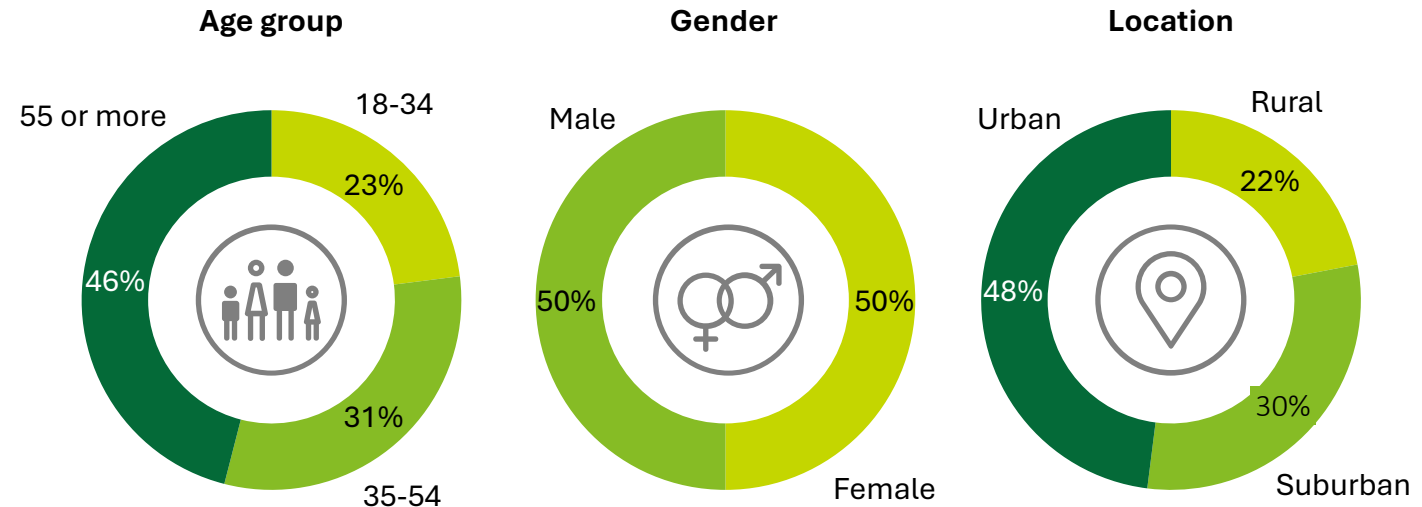


About the study

The survey was conducted from October to December 2024. It was fielded using an online panel methodology that invited consumers of driving age to complete the questionnaire via email. Overall, around 31,000 consumers from 30 countries were polled.

In Germany, the sample took in 1,507 consumers, forming the basis for the analysis presented in the previous pages.

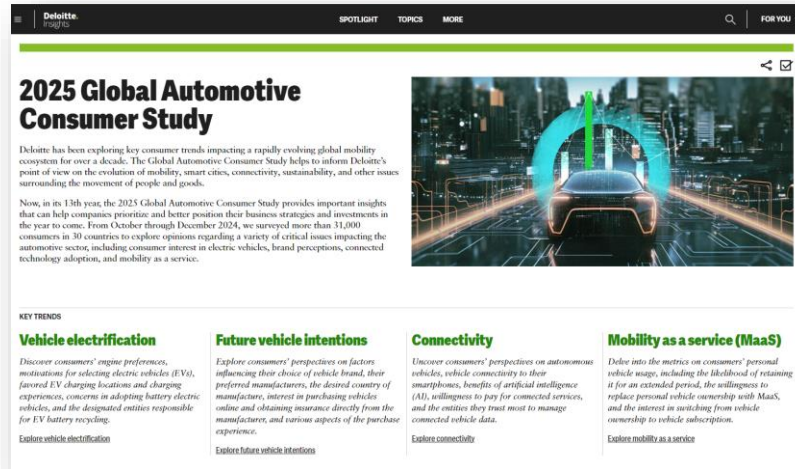
Fig.12 – Demographics



Downloads

Download the full report [here](#)

Visit the interactive dashboard [here](#)



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