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# eReadiness 2022

3<sup>rd</sup> edition

*Survey Report*

Customer needs and recommended  
actions for OEMs

July 2022



# This study provides updated perspectives on the short-term development of the e-mobility business in 7 European markets

## About the Study










### Context

- Over the last few years, OEMs have made significant investments for the electrification of vehicles, which have not yet been fully converted into relevant revenue streams despite the share growth registered in the first half of 2022
- OEMs have continued their investment in e-mobility throughout the COVID-19 outbreak and, more recently, are facing the challenges induced by the war in Ukraine – OEMs need to re-define their market approach to maximize the return on investments



### Survey Goals

- PwC Strategy& has launched the **3<sup>rd</sup> edition of the pan-European eReadiness study** to capture market perspectives and help OEMs identify the most viable options to ensure short-term commercial effectiveness
- The study focuses on two different architectures of electric vehicles, Battery Electric Vehicles (BEV) and Plug-in Hybrid Vehicles (PHEV), subsequently jointly referred to as EVs, to simplify the reading
- The study took the form of a consumer research sample focusing on **7 European markets**:  France,  Germany,  Italy,  Norway,  Spain,  Switzerland and the  United Kingdom

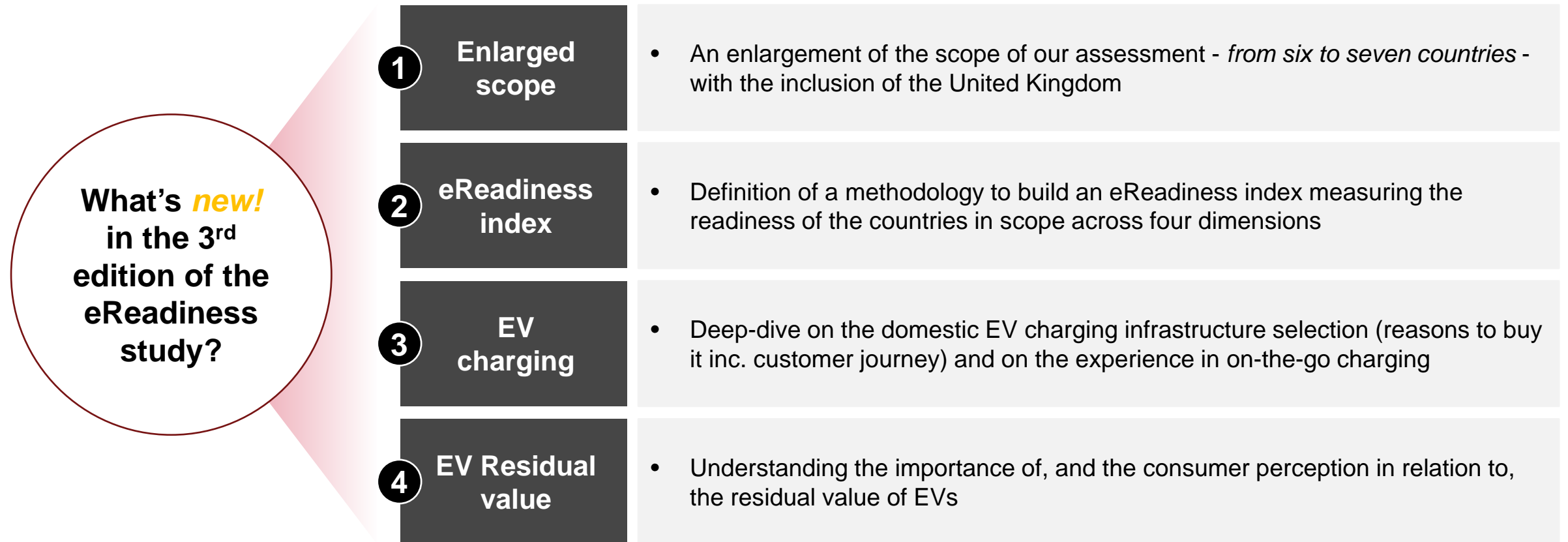


### Sample & Methodology

- **4,600+ consumers surveyed** through a web-based tool collecting answers across the 7 markets in scope
- **Consumer research sample**: representative sample of the driving population of each market in scope
- **eReadiness index**: comprehensive index of the maturity of EV markets, of the countries in scope, built on 4 main dimensions: government incentives, infrastructure, supply and demand

# The 3<sup>rd</sup> edition of the eReadiness study presents four additional topics compared to previous years' editions

## eReadiness study 3<sup>rd</sup> edition – Key new topics



## Agenda

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1. **Executive Summary**
2. Consumers viewpoint
3. eReadiness Index
4. Recommendations on the way forward
5. Contacts



# Key insights from the consumer research sample

## Consumers demand

- Consumers show a **strong interest in e-mobility**, with 55% of the surveyed consumers disclosing an intention to buy an EV in the next 2 years
- **Share of EV owners** continued to grow as last year, reaching 6% of the panel. They are mainly **high-income, middle-aged males living in city centres** with access to private parking spaces
- **EV Prospects** (63% of the panel) have **~50% lower income** than EV Owners. Of the 6 personas identified, Dreamers, Luxurious and Tech Enthusiasts, are the 3 determined to have the greatest intention of buying an EV and **represent 40% of the demand** in the next 2 years
- **Sceptics** (31% of the panel) are **predominantly women** with a lower disposable income than prospects and **~10 years older than prospects**
- **Online vehicle sales** represent 10% of EV sales, yet **55% of consumers would buy their next vehicle online** driven by convenience and price transparency
- **Charging infrastructures are in demand**, with 57% of consumers buying solution bundles with the EV, and an additional 14% purchasing private charging infrastructures independently after the vehicle
- **Used EV Owners are increasing** (20% of EV Owners panel), mostly represented by less wealthy customers compared to new-EV owners

## eReadiness Index – *It indicates a relative level of maturity for e-mobility*

- **Norway** stands out as the **most prepared country** for e-mobility across all dimensions (Government incentive, Infrastructure, Supply, Demand)
- **Germany** in the midfield with relatively **strong performance in the governmental incentives** and **increasing customer demands** of EVs
- **Spain and Italy registered the lowest score** mainly due to the lack of infrastructure - Spanish government adopted a generous incentive policy to promote EV adoption
- **Italy shows great intention to buy** which has not translated yet into substantial EV sales
- **France** has an **average level of EV infrastructure** which, coupled with a higher level of incentives, could **result in a larger uptake of EVs**
- **UK** shows a **good level of consumer demand** sustained by the EV infrastructure but limited incentives for consumer EV sales
- **Switzerland** ranks second in the eReadiness index with a **high level of demand supported by solid EV infrastructure**

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# Key takeaways

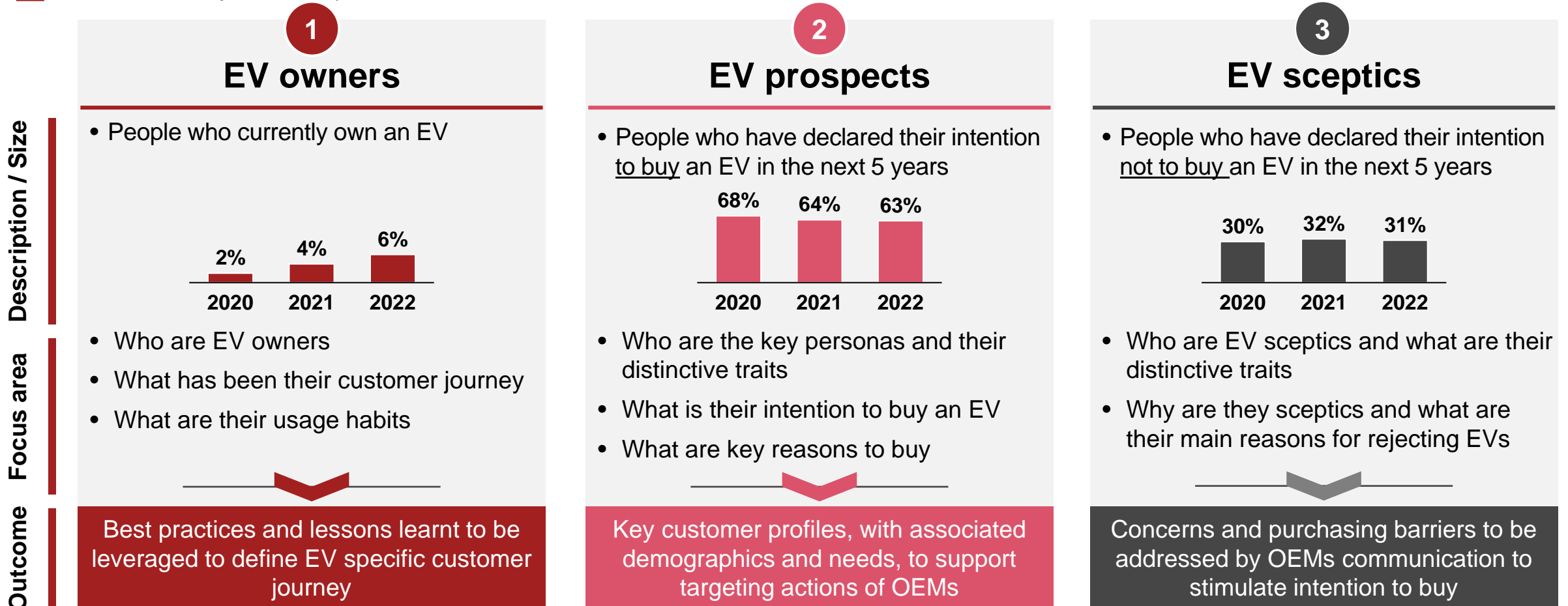
- Consumers confirmed their interest in EVs, with 55% of surveyed drivers disclosing an intention to buy an EV within the next 2 years
- Respondents have been grouped into 3 clusters:
  1. **EV owners** (6% of B2C survey respondents, compared with 4% in 2021, showing an increased adoption of EVs):
    - High-income, middle-aged people, living in urban areas and with a private parking spot
    - Purchase takes place at the Dealership in 82% of cases, this has decreased slightly in favour of online sales and used car purchase from direct connections
    - Driving experience, either at an official test drive or using cars of friends/family is the key deciding factor
    - 57% of respondents purchased a bundled package including EV plus home charge solution and/ or services with an additional 14% purchasing it independently, driven by better price /charging speed
    - Up to 30% purchased additional EV-related products/services within short time from the EV purchase
    - While home and office are primary charging locations, EV owners charge on the go in 28% of cases
    - Used EV ownership is still limited (accounting for 20% of total EV ownership) and mostly represented by customers with slightly lower income
  2. **EV prospects** (63% vs. 64% in 2021 of B2C survey respondents):
    - ~50% lower income if compared to current EV owners
    - *Dreamers, Luxurious* and *Tech Enthusiasts* are the 3 personas (out of the 6 identified) with highest intention to buy in the next 2 years – they represent 40% of the demand in the next 2 years
    - Main reasons to buy relate to lower operating costs, environmental impact and convenience
  3. **EV sceptics** (31% vs. 32% in 2021 of B2C survey respondents):
    - Middle-aged women, living outside city centres and with an income ~60% lower than EV owners
    - Key inhibitors to buy an EV relate to upfront cost and range anxiety (limited range, charging time)



# Consumers have been grouped into 3 main clusters: EV owners, EV prospects and EV sceptics

## Consumer survey – Clusters and investigation areas

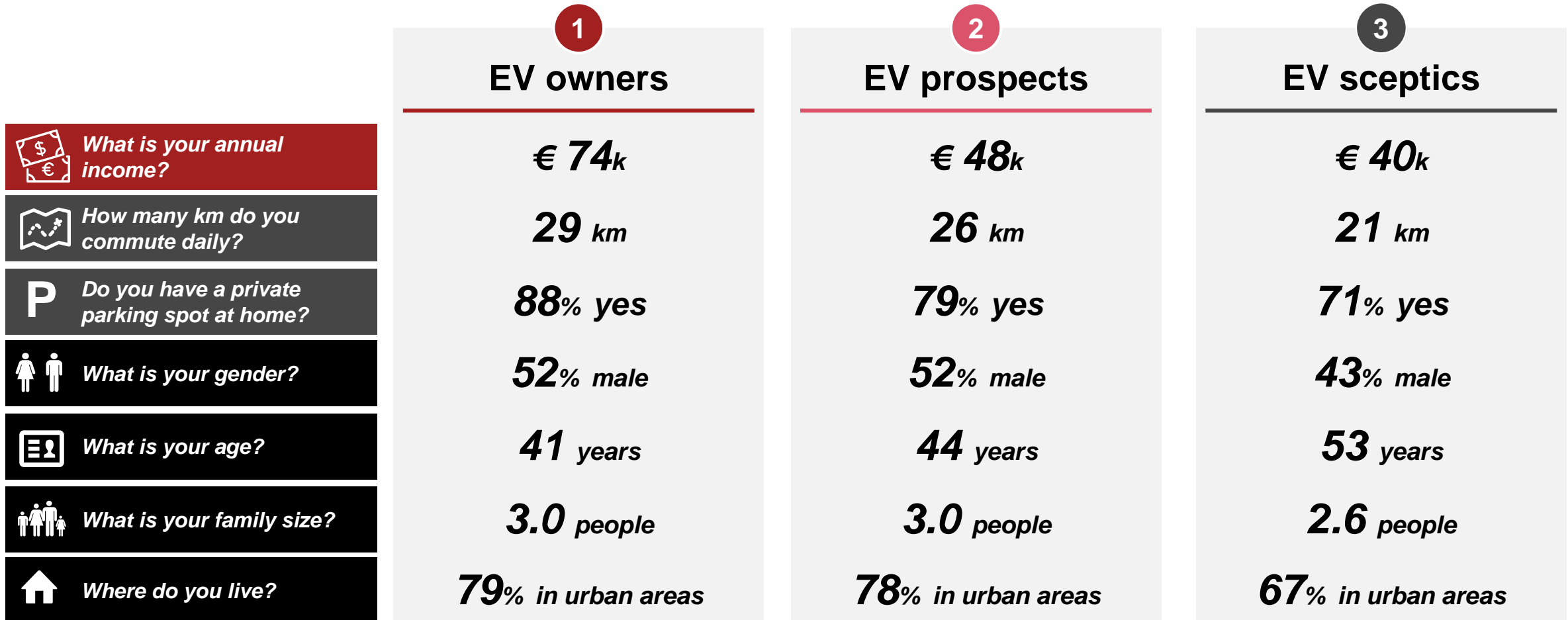
% B2C Customers Sample: #4,607 respondents





# EV owners, EV prospects, and EV sceptics display some specific traits with regard to income, mobility needs and demographics

## Consumer survey – Cluster profiles



# 1 EV owners

## EV owner's profile is evolving, compared to 2021, average income is still high, yet reducing, and the average age is decreasing

### Profiling – EV owners vs ICE owners

% B2C Customers Sample: #297 respondents    ↓↑↔ Vs. 2021

How many km do you commute daily? **29 km** ↔

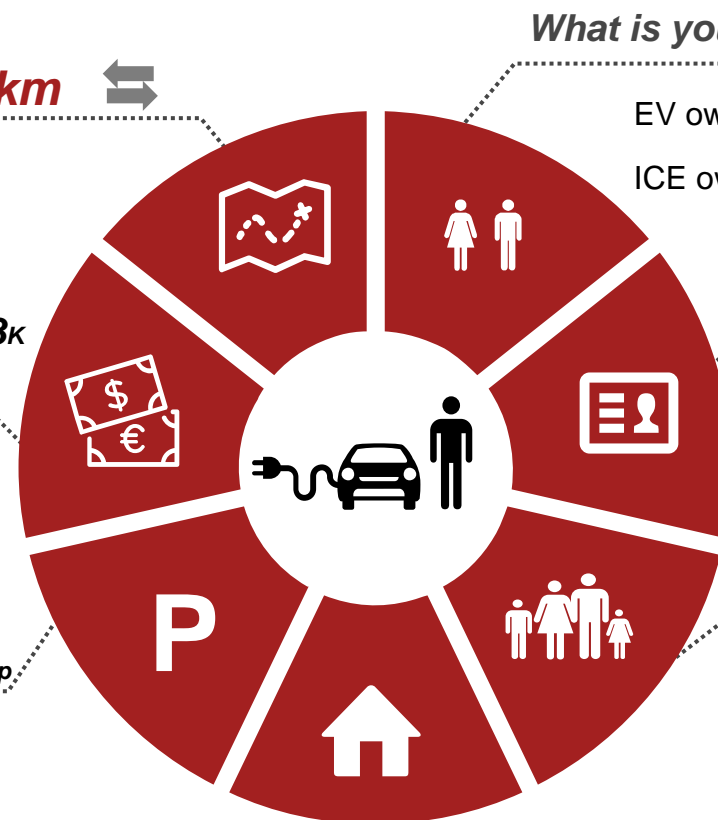
EV owners commute on average **5 km** **more** than ICE owners

What is your annual income? **€ 74k** ↓ -€3k

The average annual income of EV owners is **1.6x** the average income of ICE owners

Do you have a private parking spot at home? **88% yes** ↓ -4p.p.

**12% more** of EV owners have a **private garage** compared to ICE owners



What is your gender? **52% male** ↓ -5 p.p.

EV owners contain a **greater** proportion of men than ICE owners by **3%**

What is your age? **41 years** ↓ -5 years

The average EV owner is **4 years older** than the average ICE owner

What is your family size? **3.0 people** ↔

An average EV owner's household is the **same size** as an average ICE owner's one

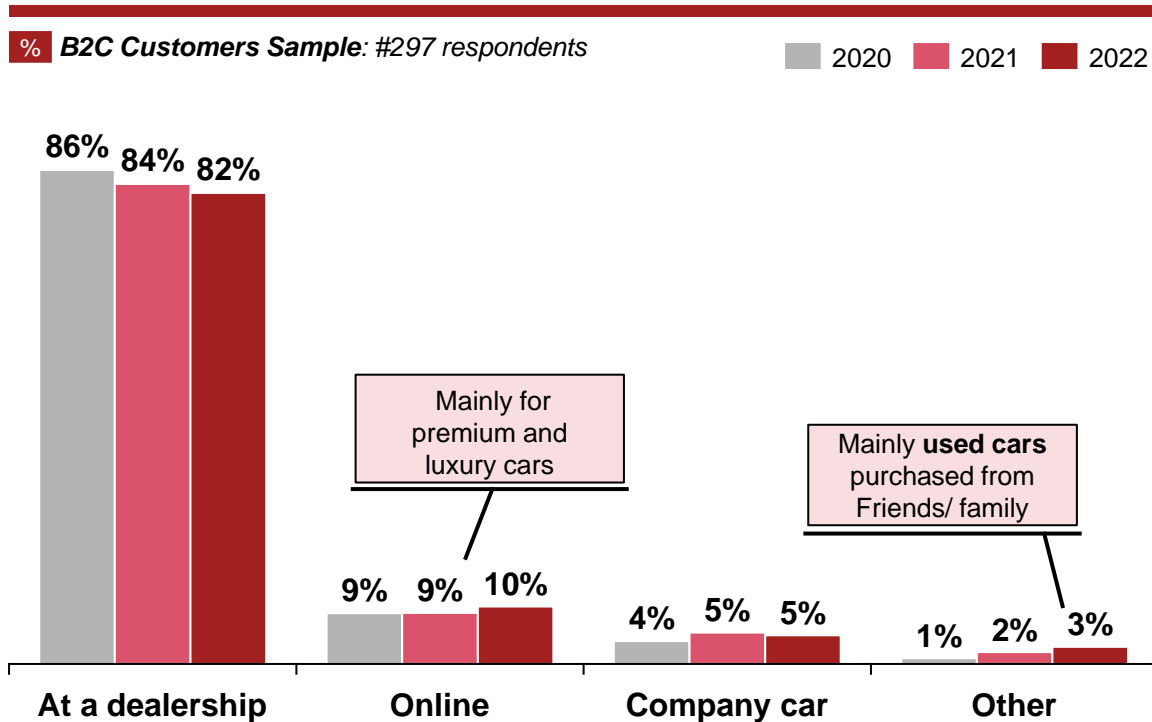
Where do you live? **79% in urban areas** ↓ -3 p.p.

**4% more** of EV owners live **in urban areas** compared to ICE owners

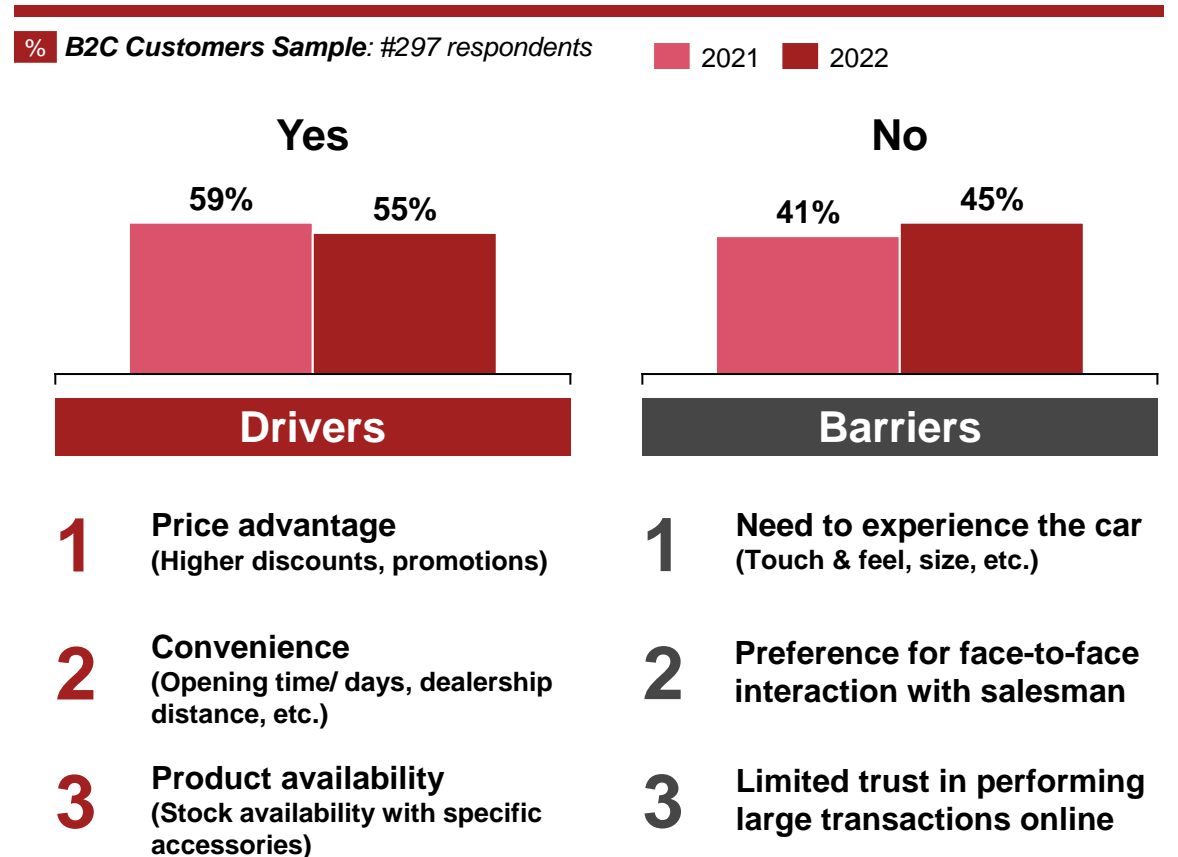
# The main purchase channel for EVs is via dealers, although 55% of respondents would consider buying online their next vehicle

## EV purchase method

### Where did you buy it?



### Would you buy your next EV online?



# Customer satisfaction with the purchasing experience decreased with fewer customers being extremely satisfied

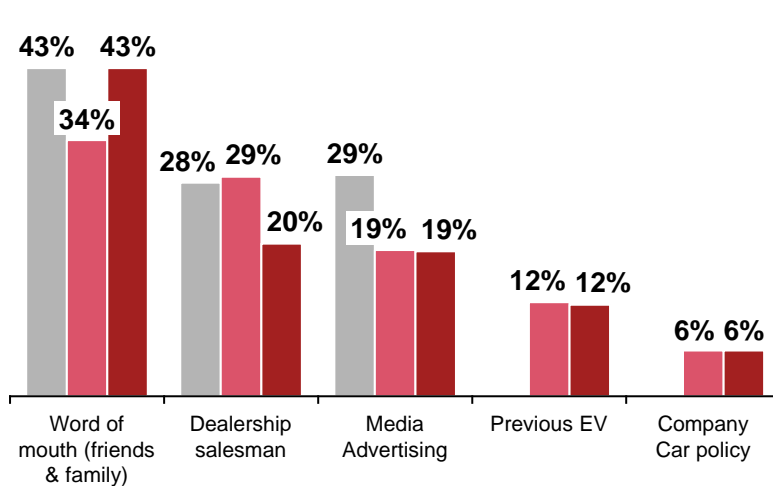
## EV customer journey

### How did you begin to consider buying an EV?

% B2C Customers Sample: #297 respondents

#### Consideration

2020 2021 2022

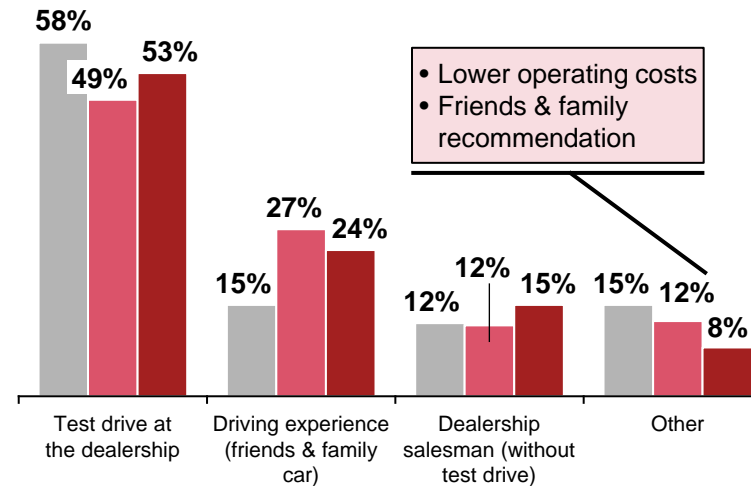


### What was the deciding factor that led you buying it?

% B2C Customers Sample: #297 respondents

#### Purchase

2020 2021 2022

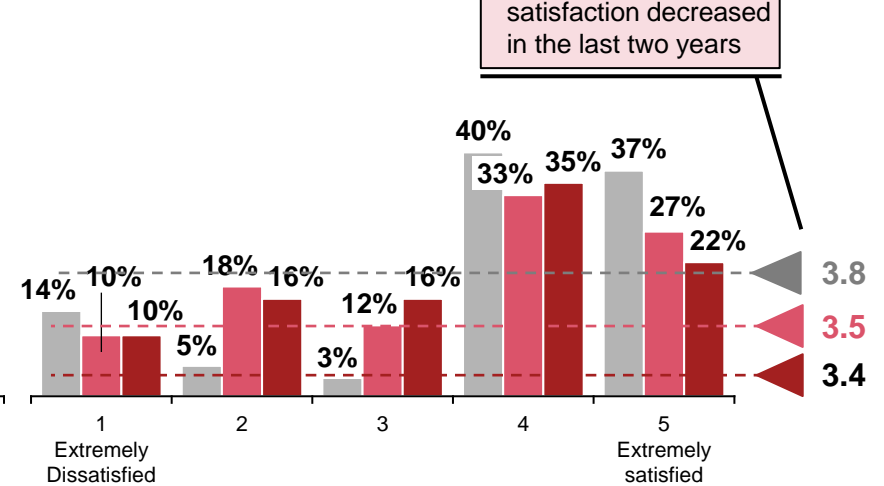


### How satisfied were you with the overall purchasing process?

% B2C Customers Sample: #297 respondents

#### Loyalty

2020 2021 2022



1 EV owners

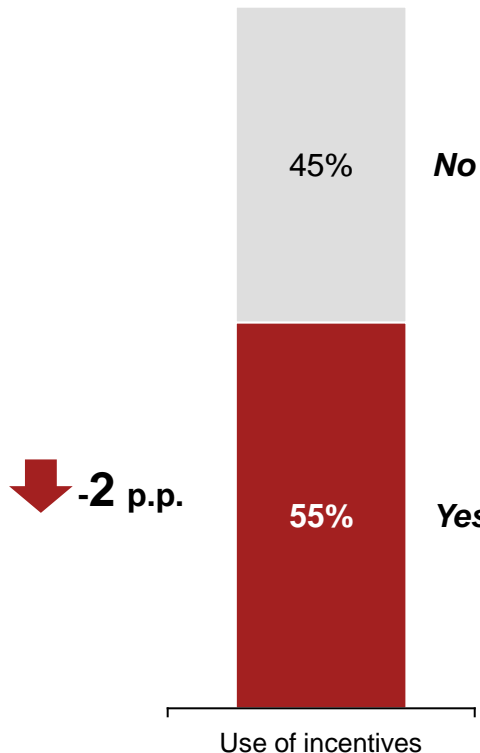
55% of EV owners took advantage of incentives for ~13% of car price however 77% would have bought the EV regardless

Use of incentives

↓↑↔ Vs. 2021

Did you make use of economic incentives to purchase the EV?

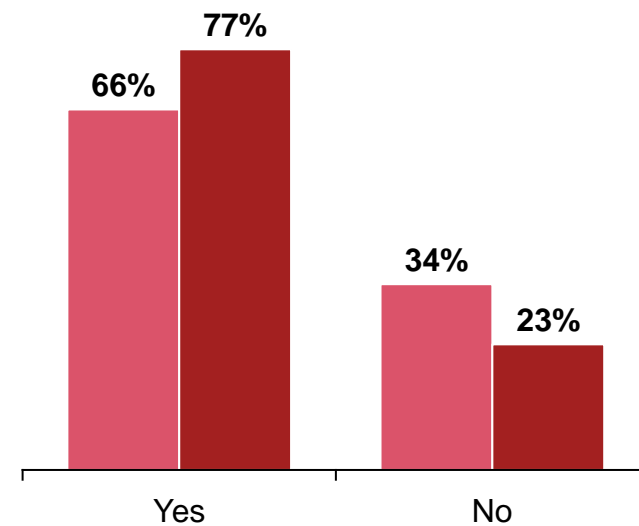
% B2C Customers Sample: #297 respondents



Would you have bought it without incentives / subsidies?

% B2C Customers Sample: #163 respondents

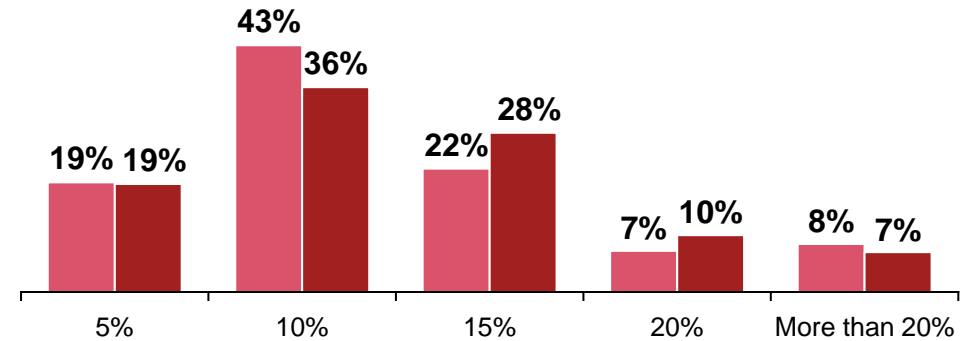
2021 2022



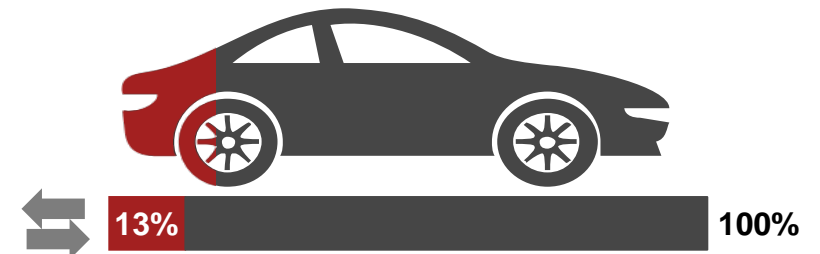
How much of the EV price was covered by local economic incentives / subsidies?

% B2C Customers Sample: #163 respondents

2021 2022



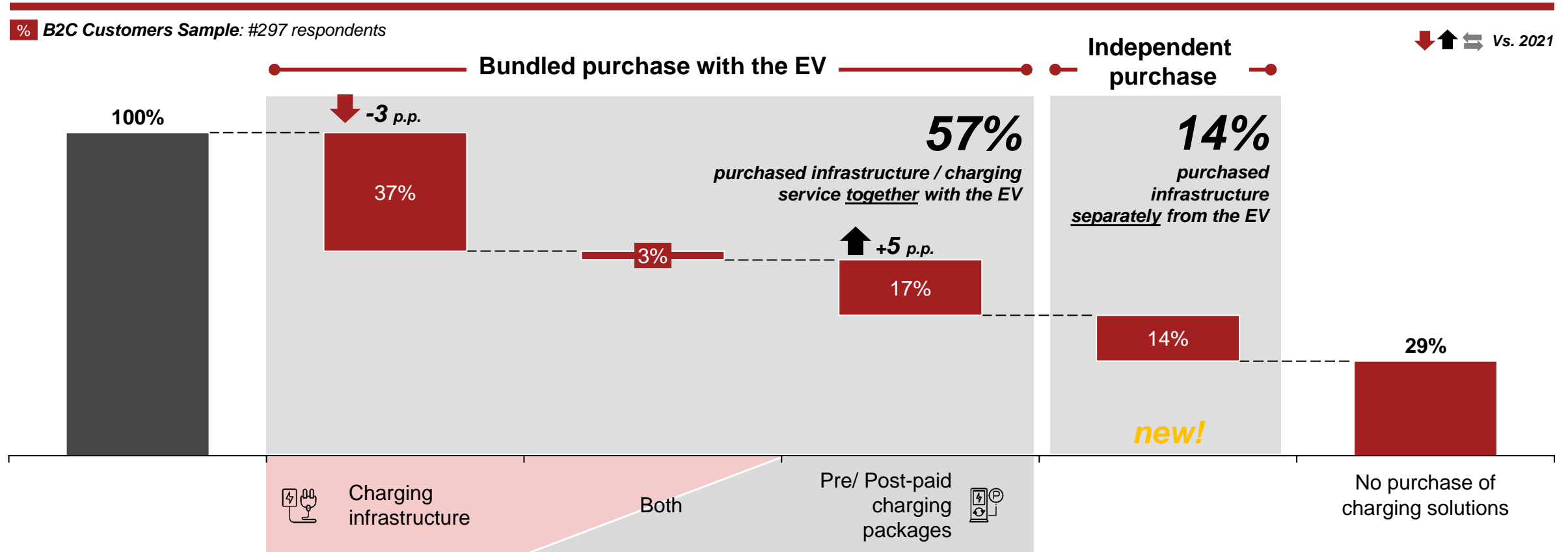
Avg. incentive coverage (of car price)



# EVs and charging solutions are typically bought in a bundle, yet 14% of customers purchased it separately from the EV

## EV charging infrastructure and services (1/3)

What additional charging infrastructure / services did you buy together with your EV?

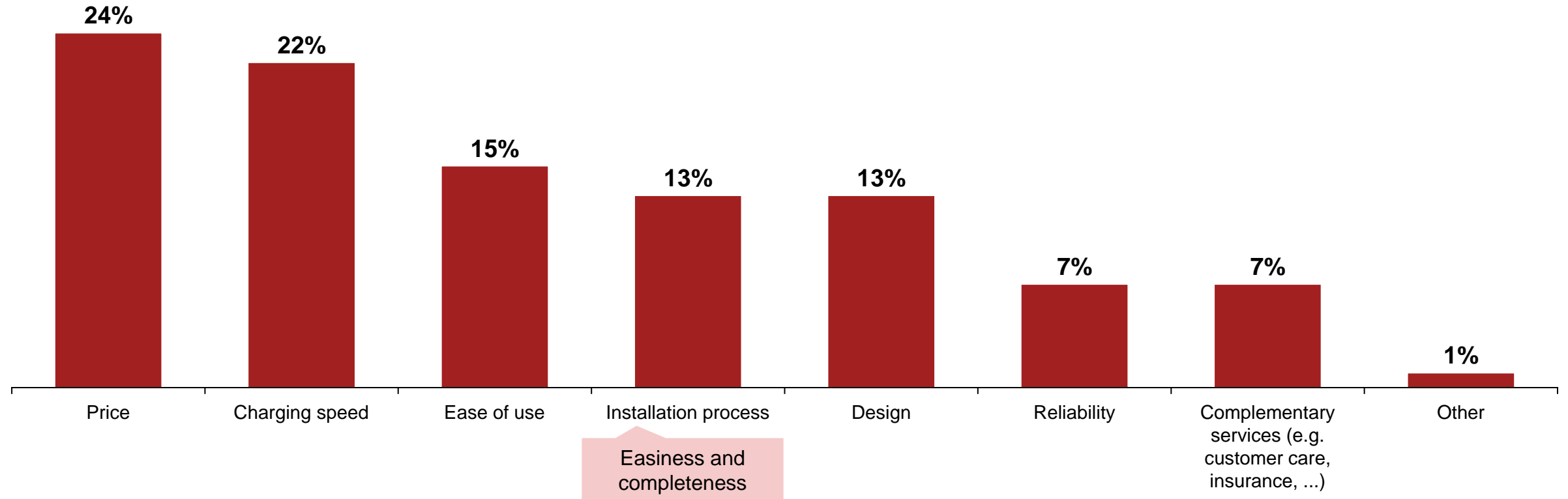


# Price, charging speed and ease of use are the top 3 driving factors when customers consider buying a new charging infrastructure

## EV charging infrastructure and services (2/3) - Purchase and driving factors

What are the key driving factors when buying the charging infrastructure? **new!**

% B2C Customers Sample: #184 respondents

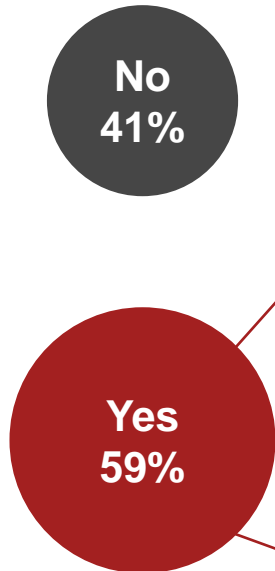


# 59% of charging infrastructure owners would buy complementary services to make their experience hassle free

## EV charging infrastructure and services (3/3)

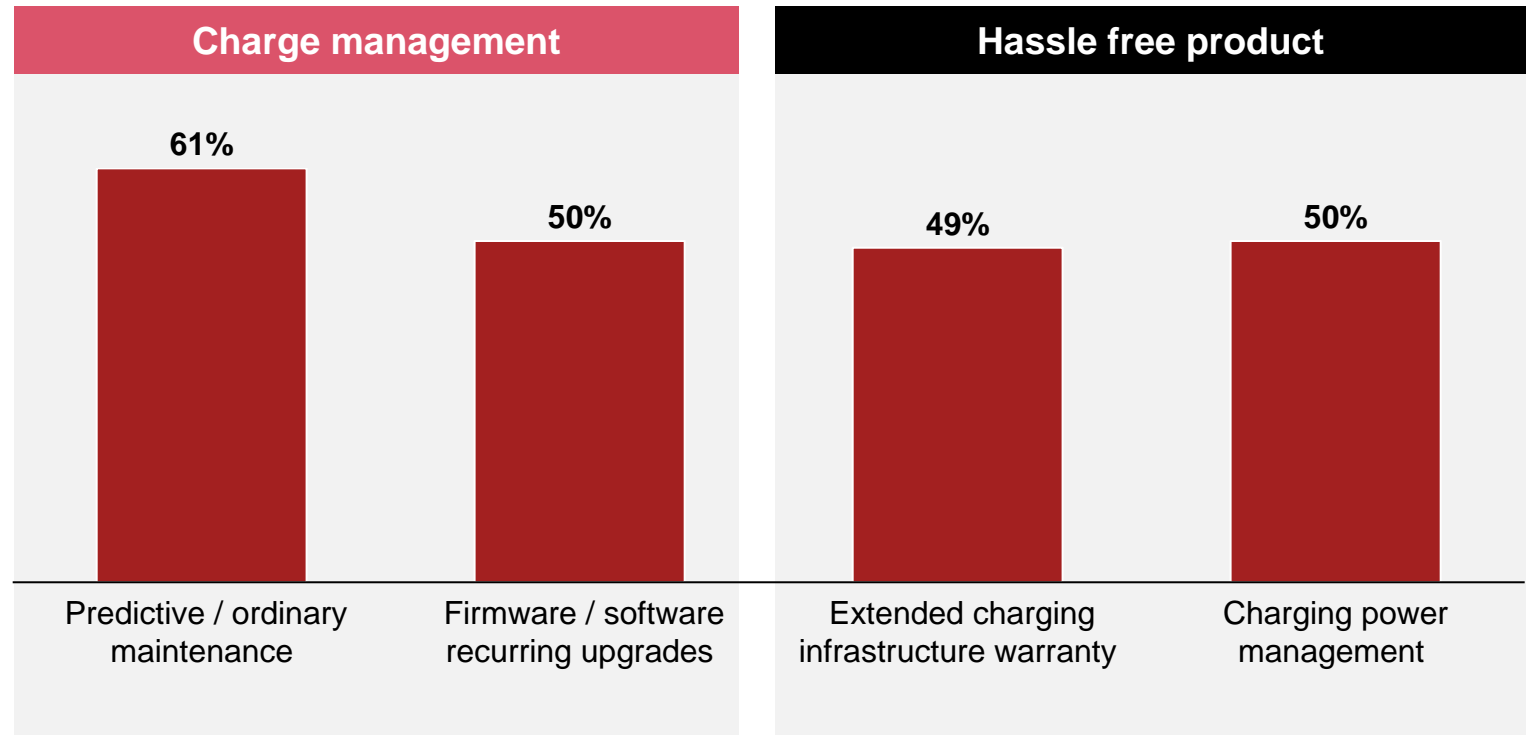
**Would you buy complementary services with your charging infrastructure?**

% B2C Customers Sample: #184 respondents



**Which complementary service you would be interested in receiving with your charging infrastructure?**

% B2C Customers Sample: #110 respondents

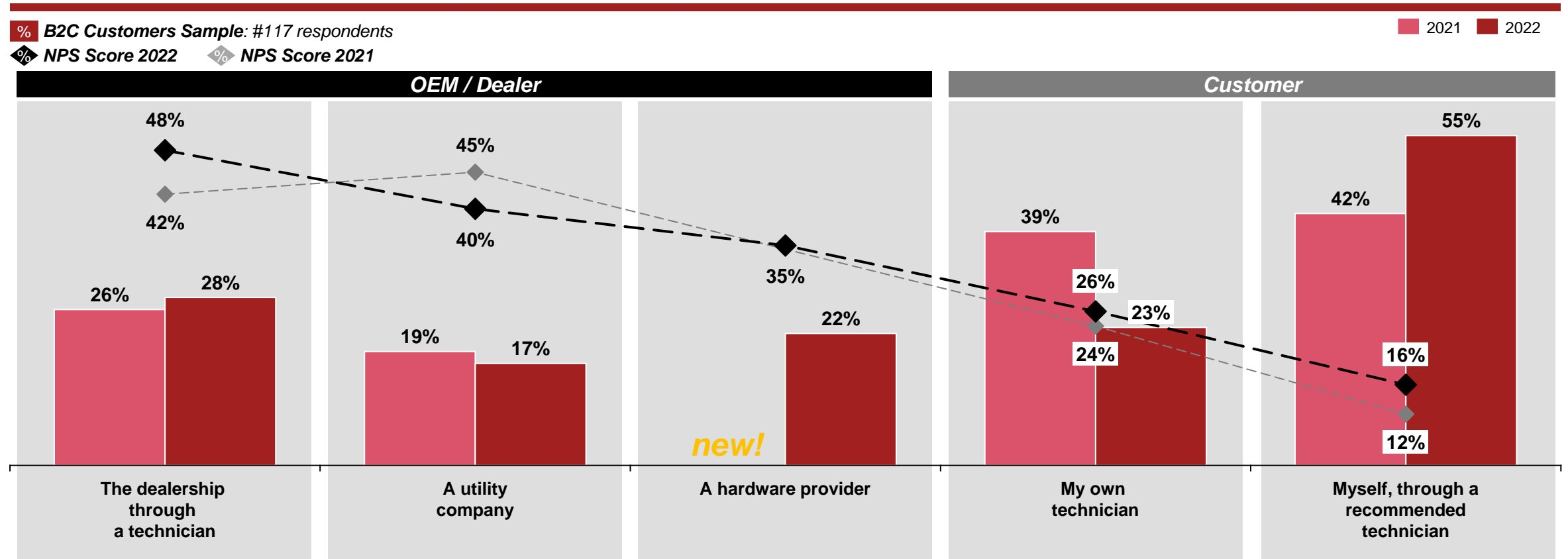




# Installation services arranged by OEMs result in higher net promoter score as compared to customer-managed installations (“self-service”)

## Charging infrastructure installation

### Who was in charge of installing the charging infrastructure? (excerpt)



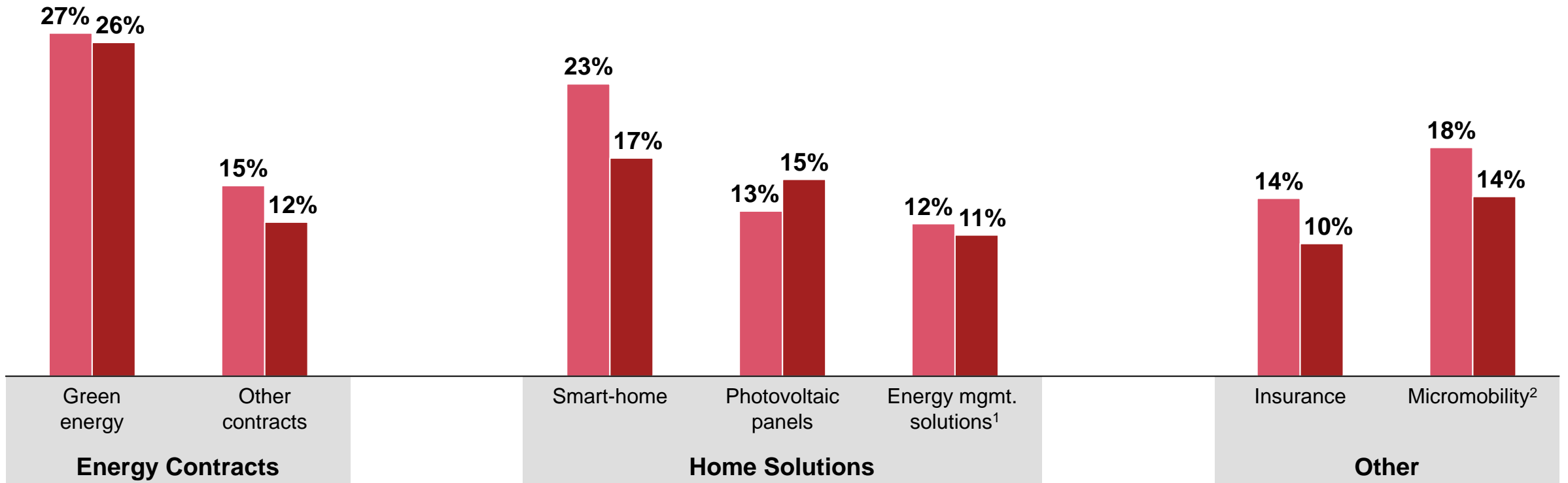
# EV owners show significant interest in EV-related products and services such as energy contracts and home solutions

## Additional products and services

What other EV-related products did you purchase recently?

% B2C Customers Sample: #297 respondents – Multiple choice

2021 2022

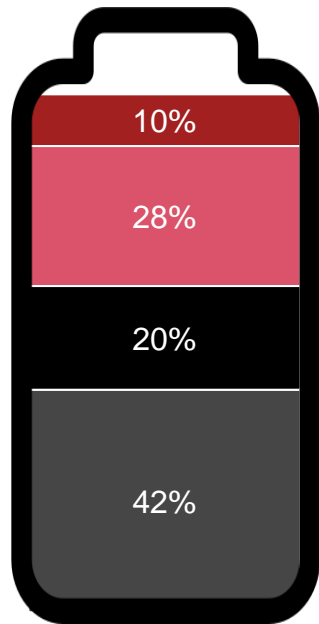


# 72% of surveyed EV owners primarily charge their EV at home/office, yet consumers relying on public charging are increasing

## Charging habits

Where do you typically charge your EV?

% B2C Customers Sample: #297 respondents

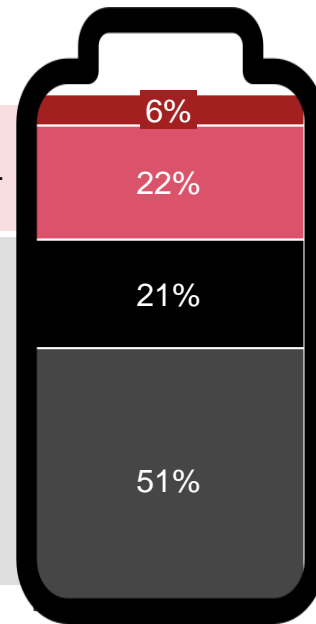


2021

Focus on next slide  
Charging on the go

Which is the primary location where you charge your EV?

% B2C Customers Sample: #297 respondents



2022

-10 p.p.

Private locations 72%

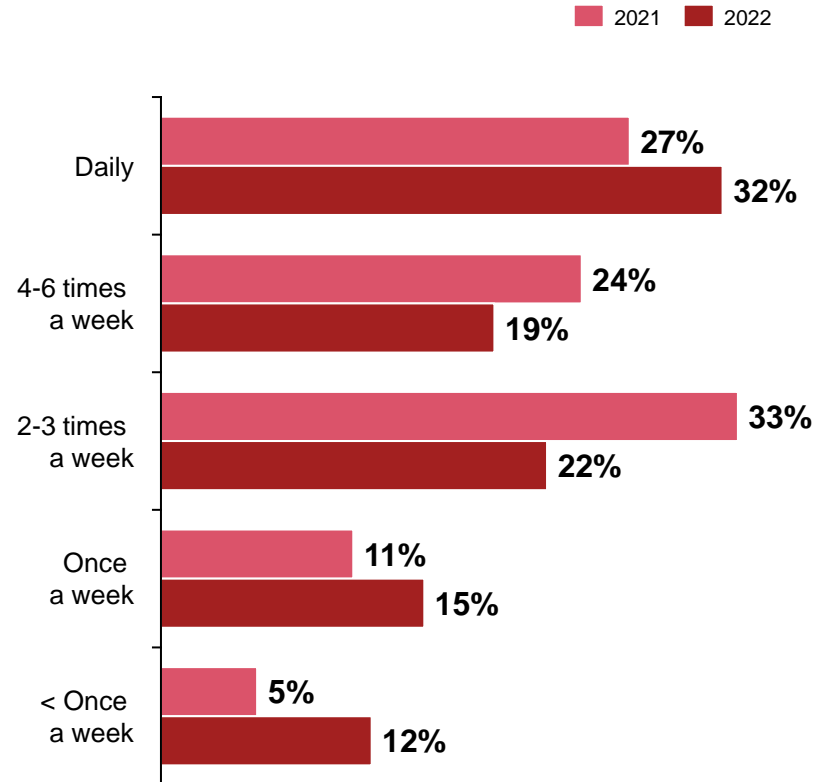
Vs. 2021

- At home
- At my office
- On the street
- Other

+10 p.p.

How often do you charge your EV?

% B2C Customers Sample: #297 respondents

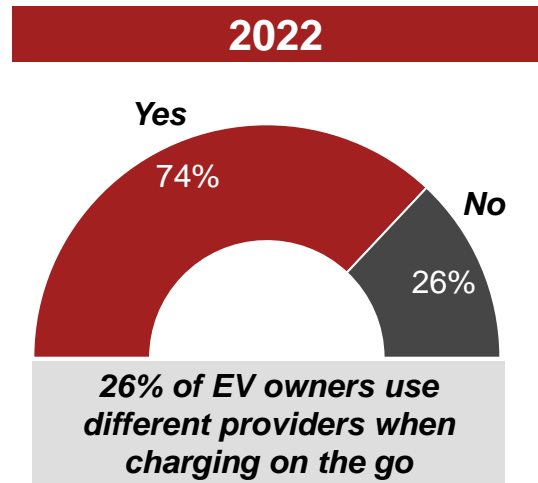
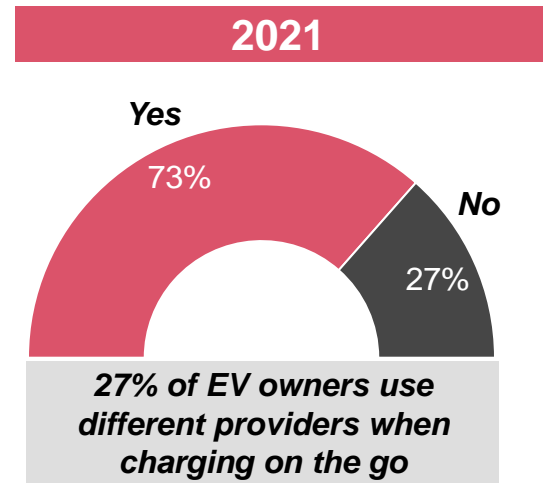


# EV owners appear loyal to their charging provider and demonstrate higher satisfaction with their offering except for waiting time

## Charging on the go Experience

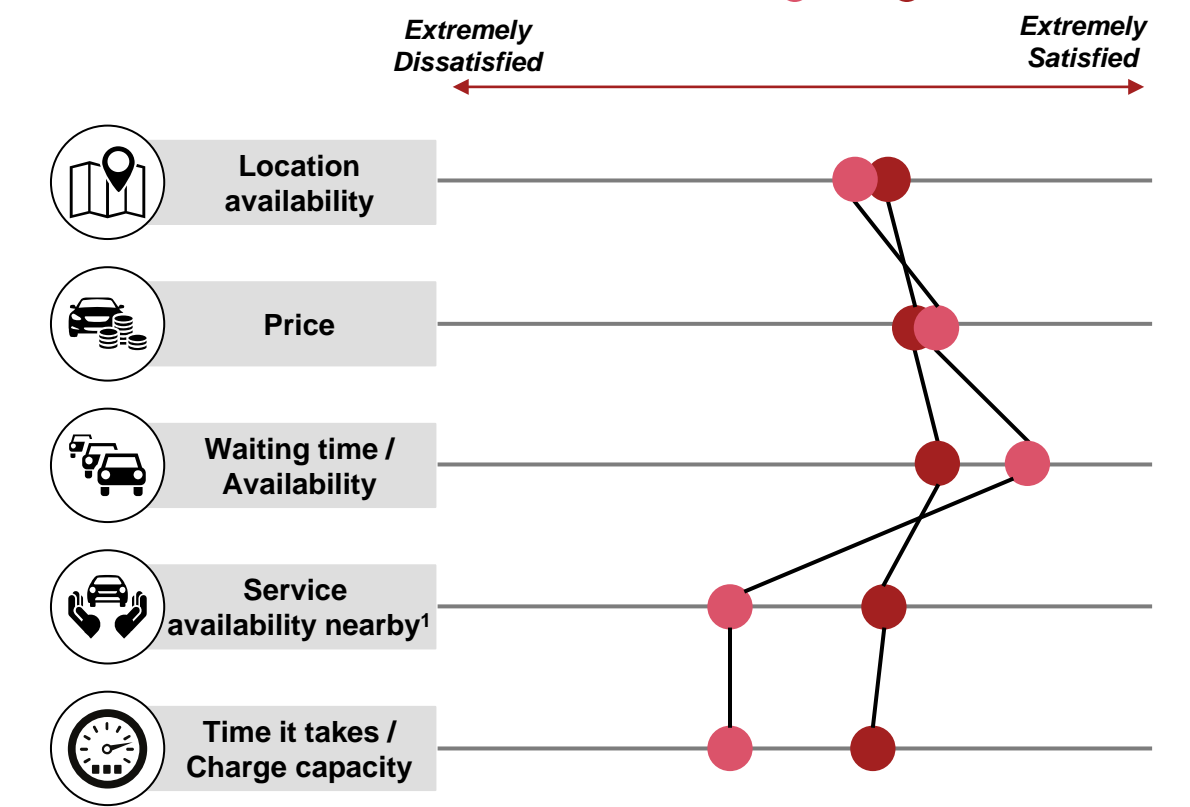
### Do you always use the same charging provider?

% B2C Customers Sample: #130 respondents



### How satisfied are you with...

% B2C Customers Sample: #130 respondents



# 1 EV owners

# Used EV owners represent a limited share of the panel, typically less wealthy than new-EV owners and with a shorter commuting distance

## Used EV Deep-Dive

### Used EV Sample

↓ ↑ ⇄ Vs. 2021

**20%** of EV Owners bought a Used Car  
+5p.p. ↑

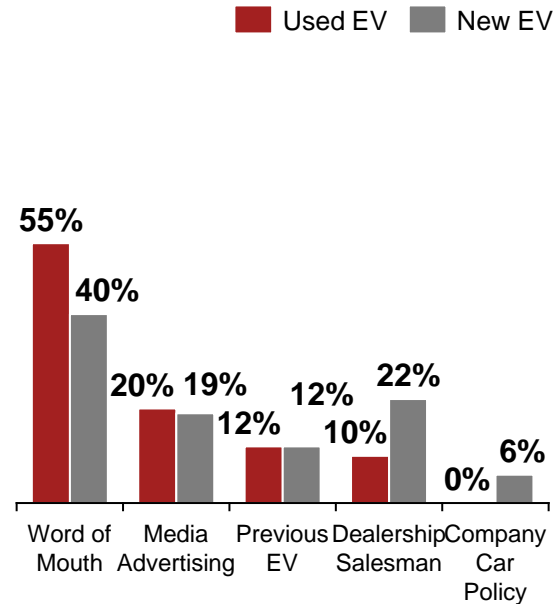
**Daily Commuting distance**  
25 Km -4 km than New EVs Owners

**Age**  
41 Yrs. +0 yrs. than New EVs Owners

**Income**  
€65k -€9 k than New EVs Owners

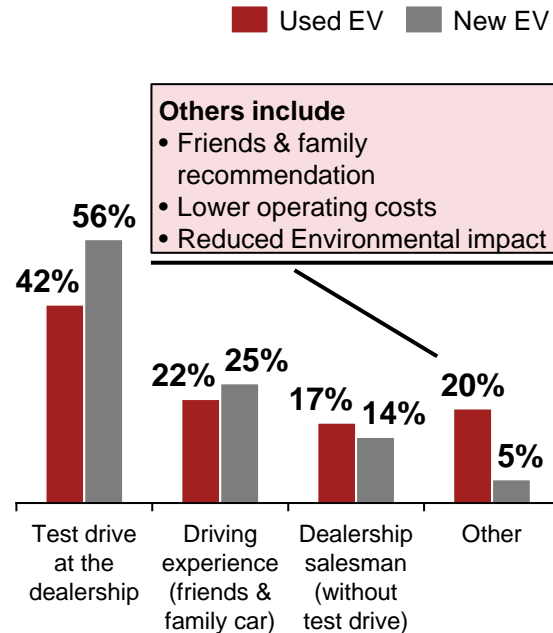
### What led you to consider buying an EV?

% B2C Customers Sample: #297 resp.



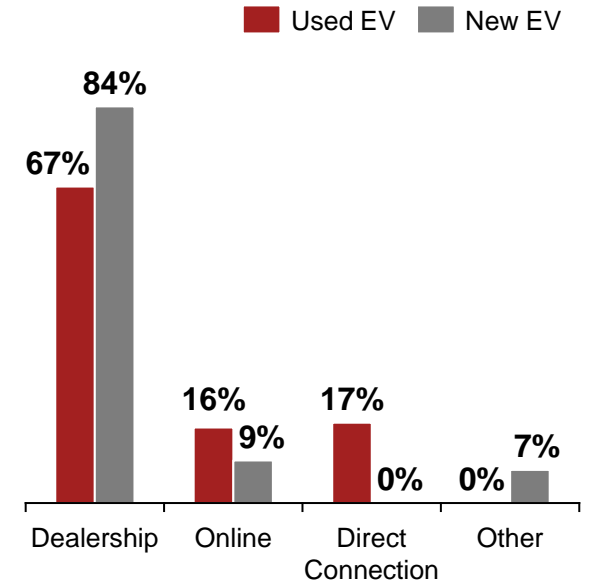
### What was the deciding factor?

% B2C Customers Sample: #297 resp.



### Where did you buy the EV?

% B2C Customers Sample: #297 resp.



Many EV prospects start considering buying a used EV car, among others due to word of mouth and increased dealer availability.

# 55% of EV Owners consider the residual value as a key purchasing factor, yet 15% have limited awareness of the current value

EV Residual value *new!*

**Was the RV<sup>1</sup> of the car a key purchasing factor when choosing it?**

% B2C Customers Sample: #297 respondents

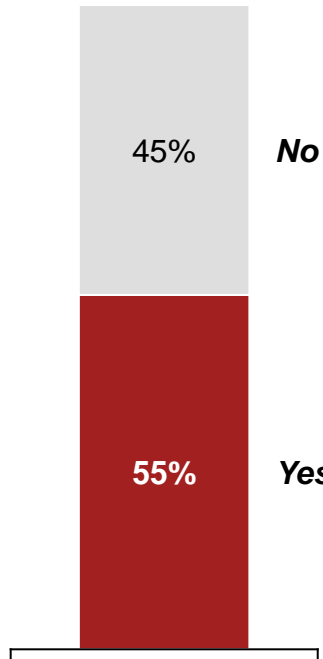
**Are you aware of your car's resell value?**

% B2C Customers Sample: #163 respondents

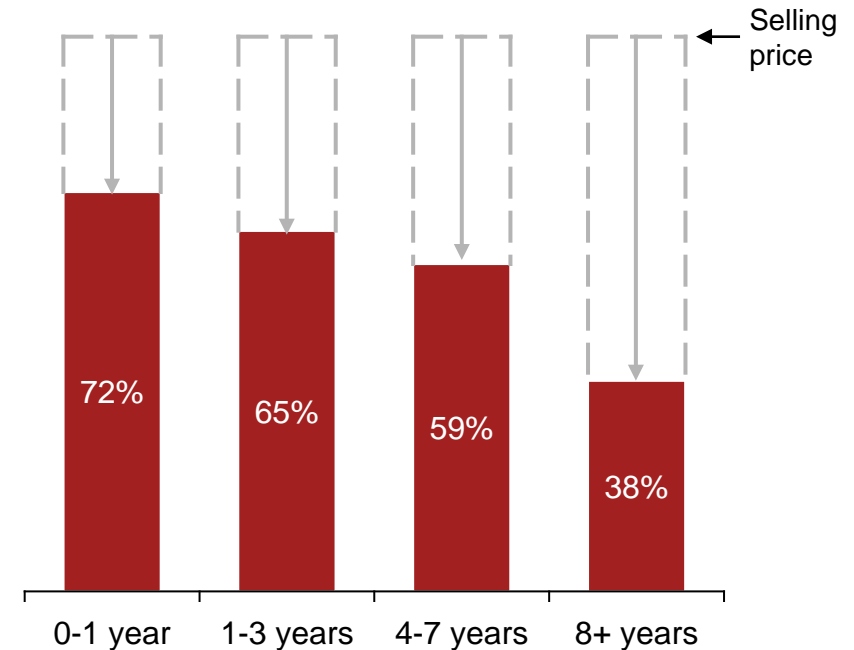
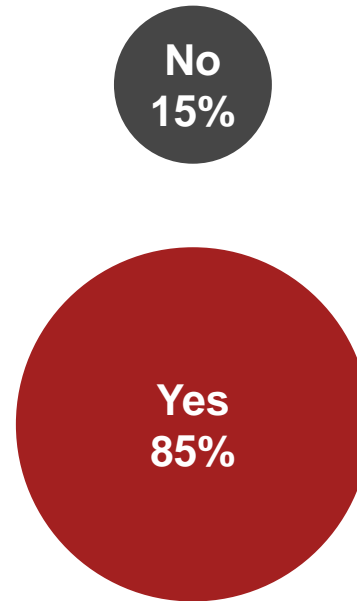
**What do you think is the RV<sup>1</sup> of your car compared to its new sales price?**

% B2C Customers Sample: #139 respondents

**Purchase criteria**



**Awareness**



## 2 EV prospects

# EV prospects are similar age to EV owners, but have a ~50% lower income

## Profiling – EV prospects vs EV owners

% B2C Customers Sample: #2,923 respondents    ↓↑↔ Vs. 2021

How many km do you commute daily? **26 km** ↓ -2km

EV prospects commute on average **3 km less** than EV owners

What is your annual income? **€ 48k** ↔

The average annual income of EV prospects is about **53% less** of EV owners' income

Do you have a private parking spot at home? **79% yes** ↓ -2p.p.

**9% fewer** EV prospects than EV Owners have a private garage

What is your gender? **52% male** ↔

EV prospects contain a **smaller** proportion of men than EV owners by only **1%**

What is your age? **44 years** ↓ -2years

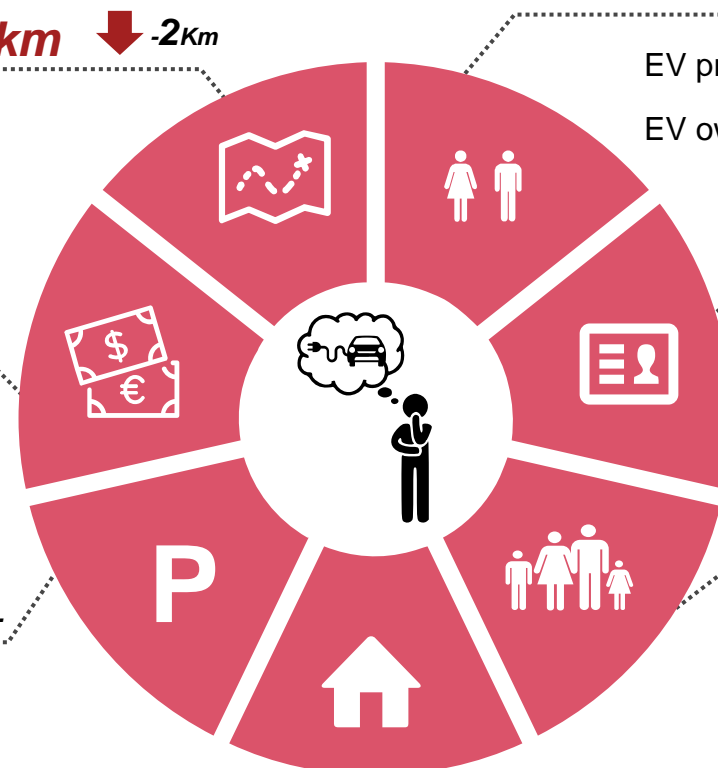
The EV prospects are on average **3 years older** than EV owners

What is your family size? **3.0 people** ↔

An average EV prospect's household is the **same size** as an average EV owner's one

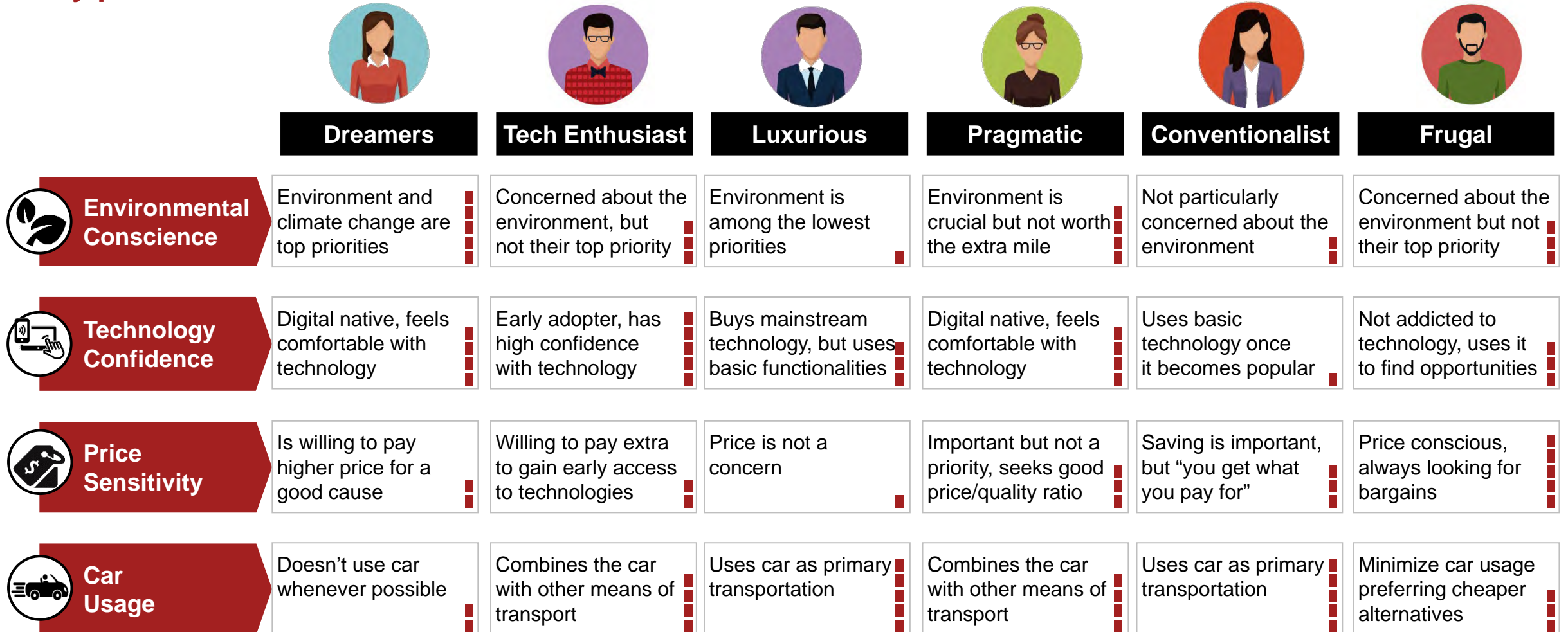
Where do you live? **78% in cities** ↔

**1% less** of EV prospects live **in cities** compared to EV owners



# We have identified six personas amongst prospective EV customers based on four behavioural dimensions

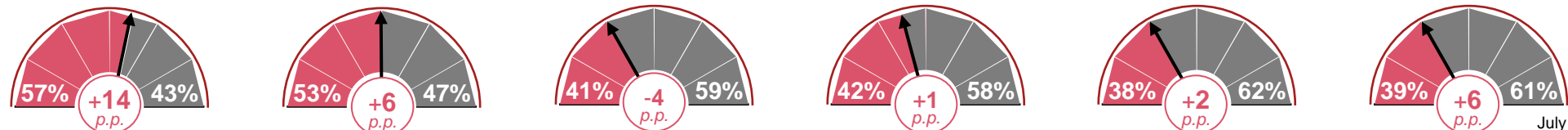
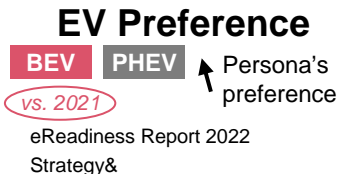
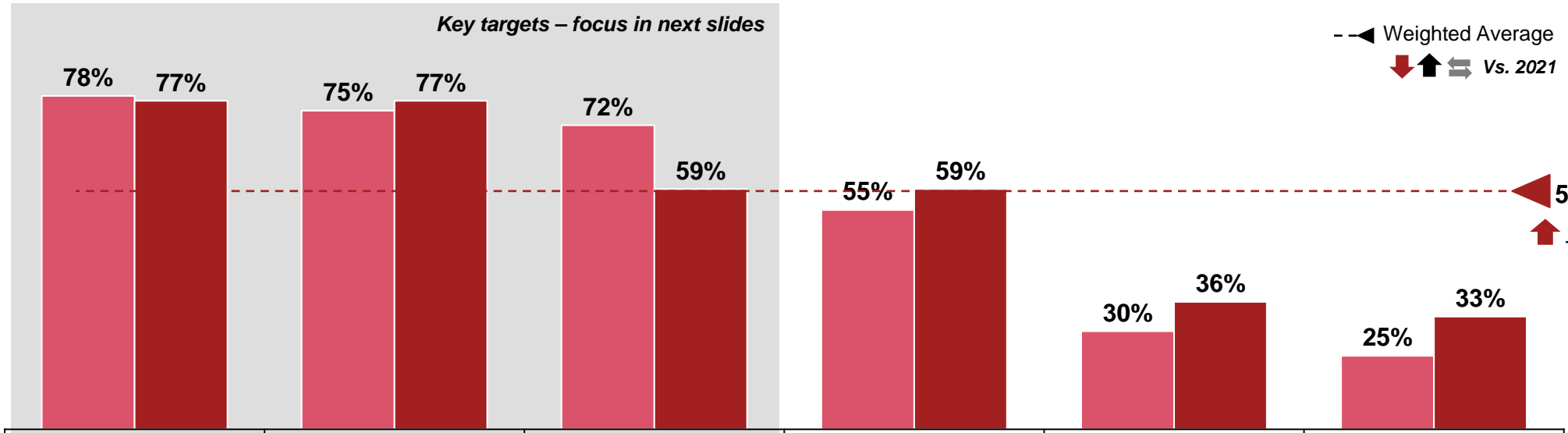
## Key personas





# Dreamer, Luxurious and Tech Enthusiasts consistently show the highest intention to buy in the near future

Focus on key personas – EV purchase intention



Source: Strategy& analysis on feedback from B2C survey

# Dreamers have the highest intention to buy, yet they might be looking at a lower price tag and focus on environmental impact

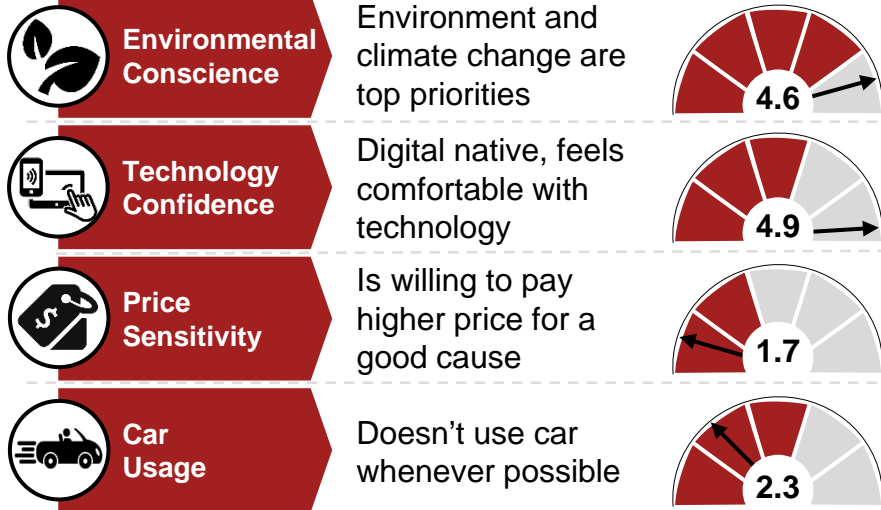
Focus on target customers – Dreamers



**Dreamers**



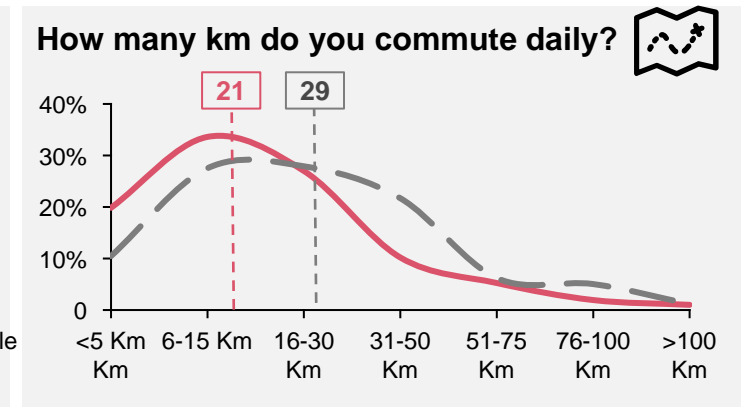
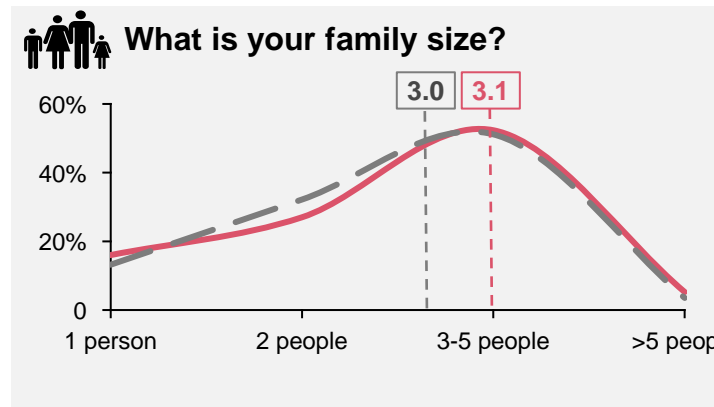
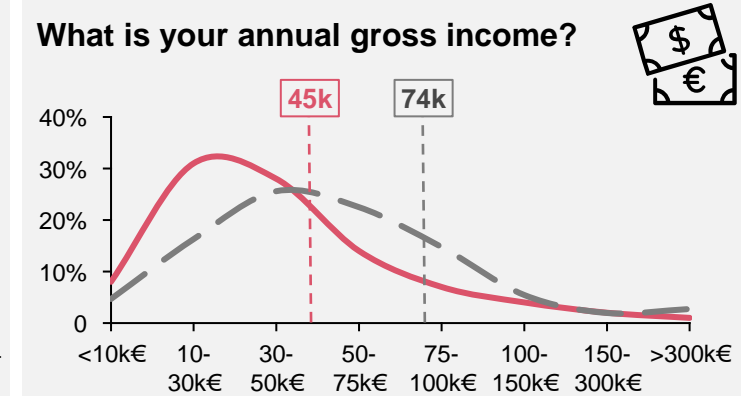
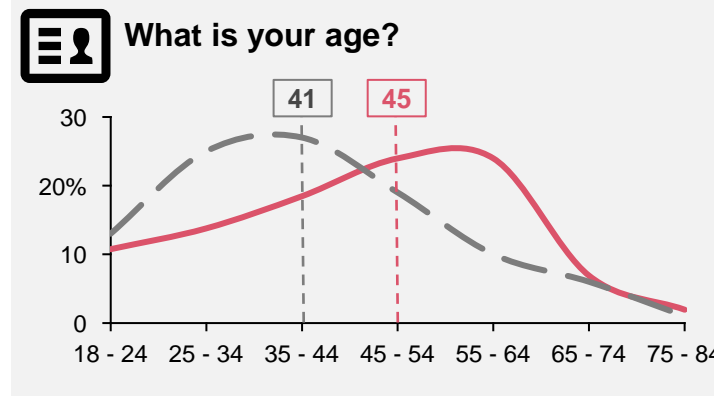
**77%**



Total population score Dreamer score

## Profiling EV prospects with intention to buy

— Dreamers — EV owners # Dreamers, average value # EV owners, average value



# Tech Enthusiasts are middle-aged people interested in the latest tech feature, representing a good target for OEMs

Focus on target customers – Tech Enthusiasts



**Tech Enthusiasts**



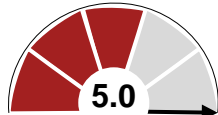
**77%**



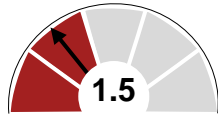
Concerned about the environment, but not their top priority



Early adopter, has high confidence with technology



Willing to pay extra to gain early access to technologies



Combines the car with other means of transport



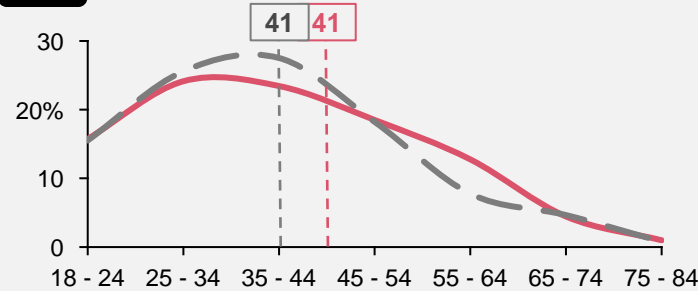
Total population score Tech Enthusiast score

## Profiling EV prospects with intention to buy

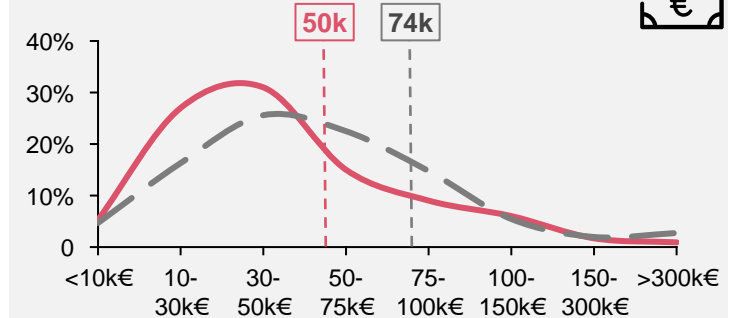
— Tech Enthusiasts — EV owners # Tech Enthusiasts, average value # EV owners, average value



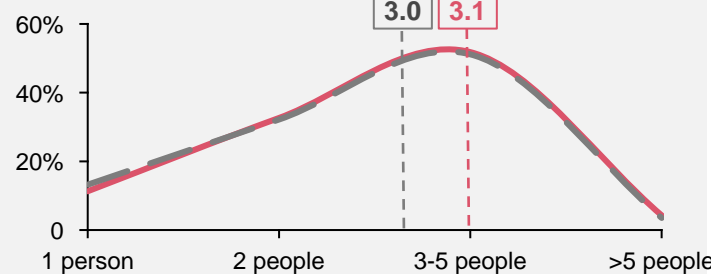
What is your age?



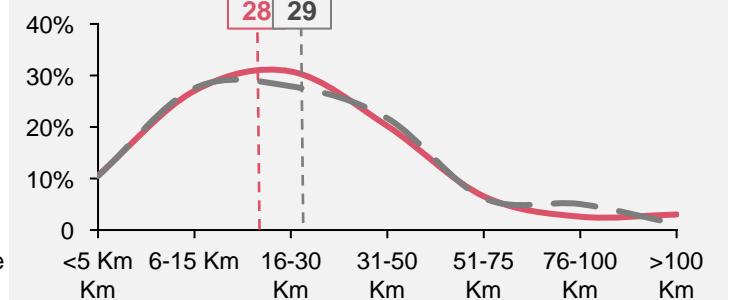
What is your annual gross income?



What is your family size?



How many km do you commute daily?



# Luxurious are young people with high income and they represent a key target for premium OEMs

Focus on target customers – Luxurious



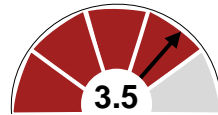
**Luxurious**



**59%**



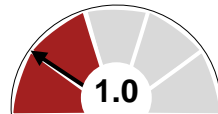
Environment is among the lowest priorities



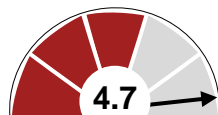
Buys mainstream technology but uses basic functionalities



Price is not a concern



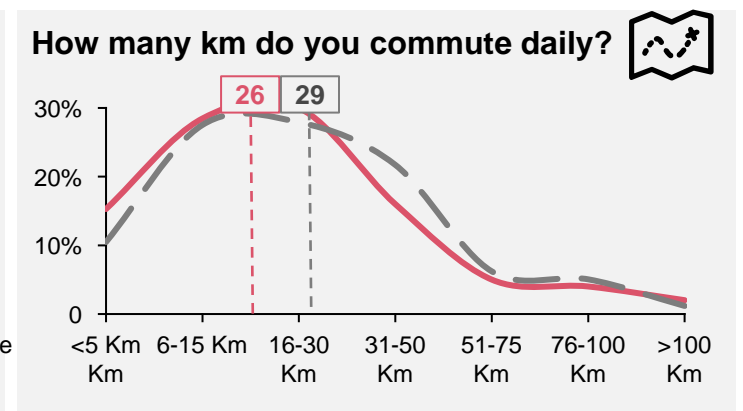
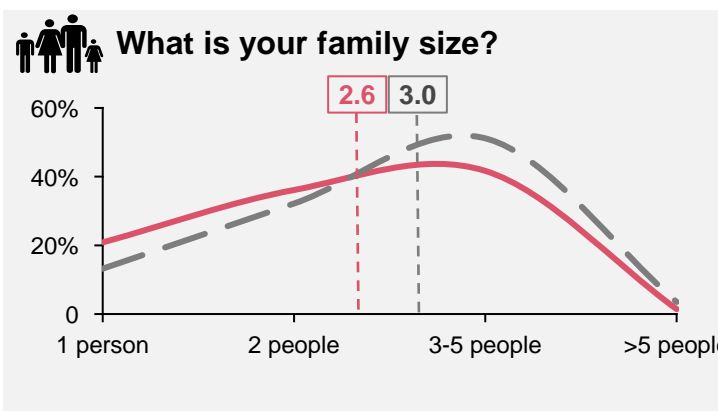
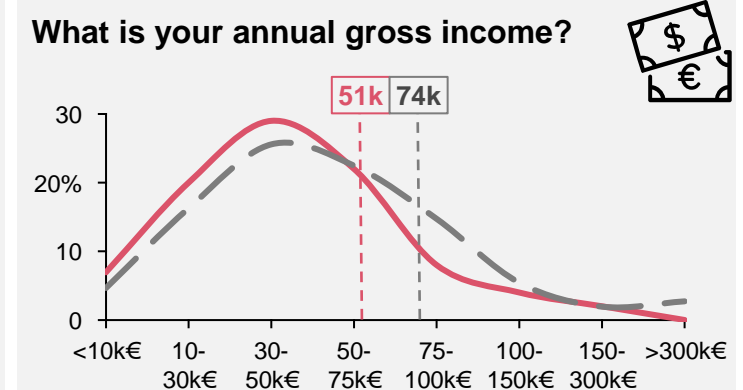
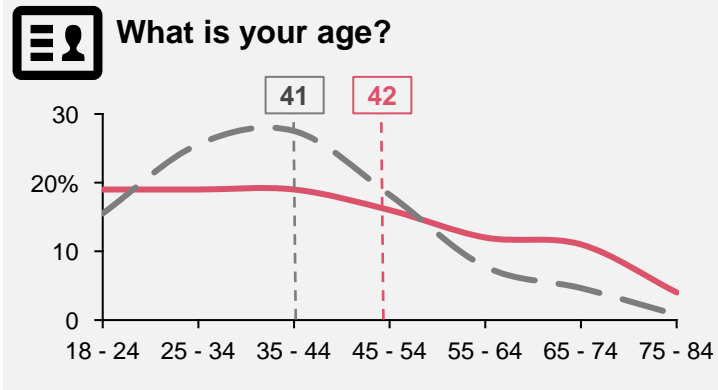
Uses car as primary transportation means



Total population score Luxurious score

## Profiling EV prospects with intention to buy

— Luxurious — EV owners # Luxurious, average value # EV owners, average value



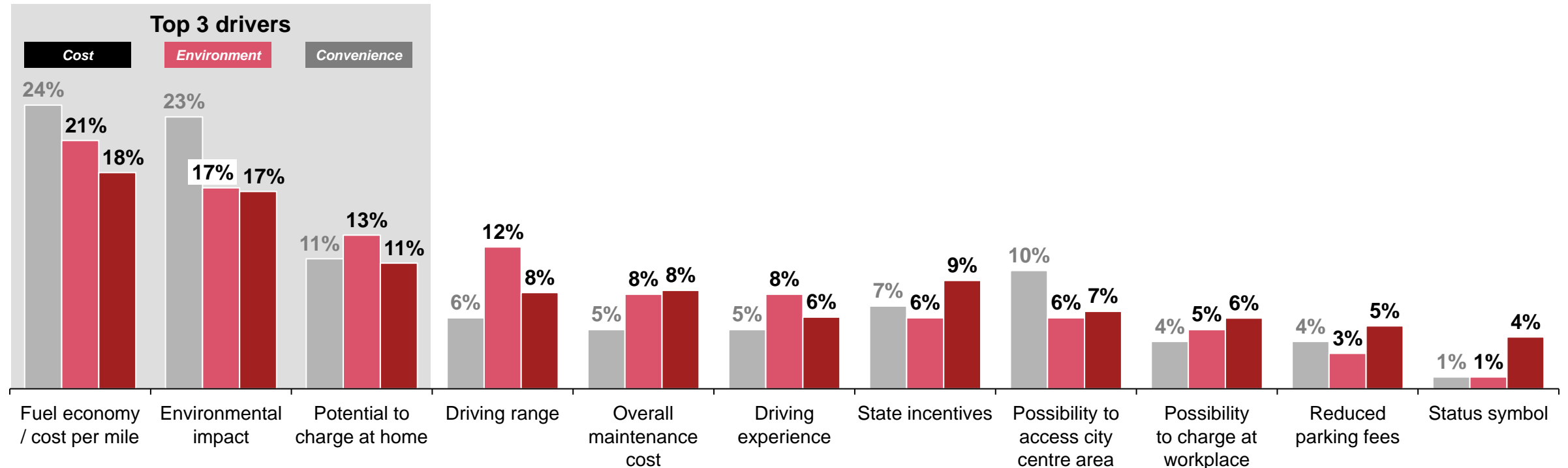
# Key purchasing drivers are in line with last year: fuel economy, environmental impact and potential to charge at home

## Purchasing drivers

### What are main reasons that drive you to buy an EV?

% B2C Customers Sample: #2,923 respondents

2020 2021 2022



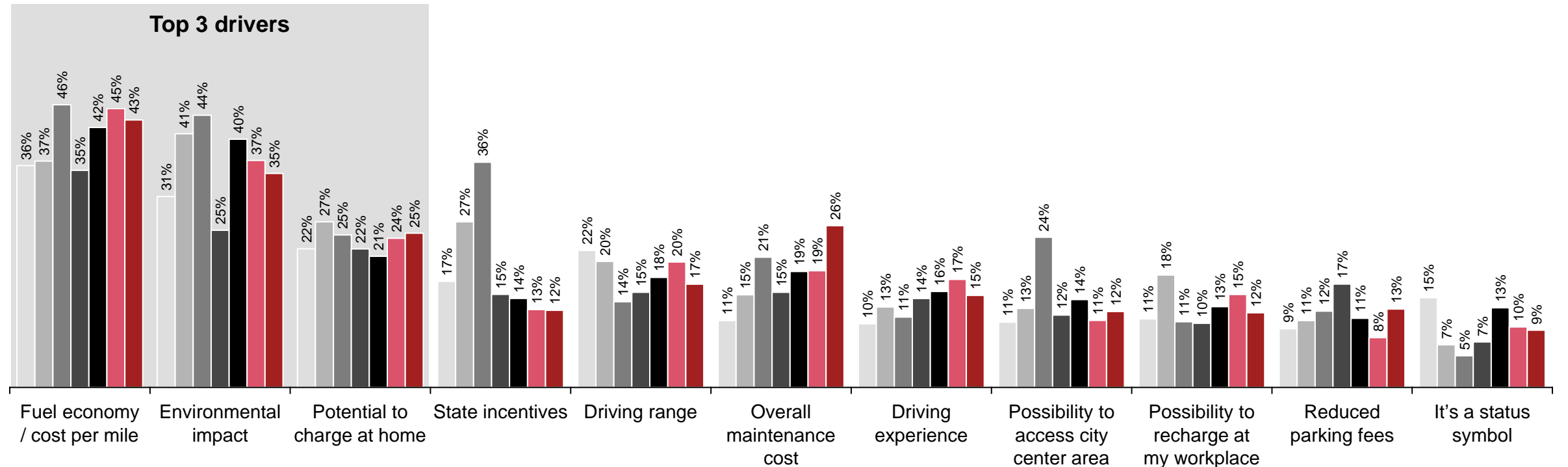
# Purchasing drivers are consistent across countries – mainly driven by cost per mile, environmental impact and possibility of home charging

## Purchasing drivers

### What are main reasons that drive you to buy an EV?

% B2C Customers Sample: #2,923 respondents

France 
  Germany 
  Italy 
  Norway 
  Spain 
  Switzerland 
  United Kingdom

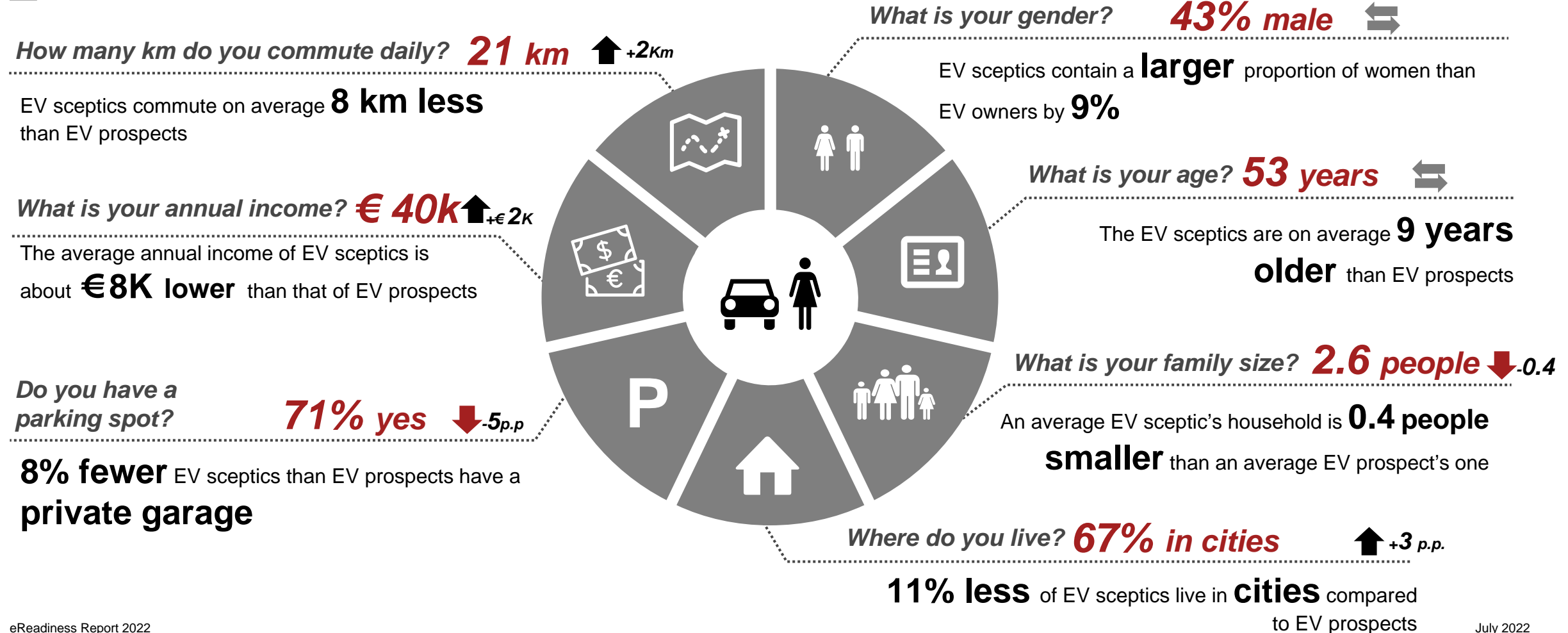


### 3 EV sceptics

# EV sceptics are older than EV prospects and with a ~20% lower annual income

## Profiling – EV sceptics vs EV prospects

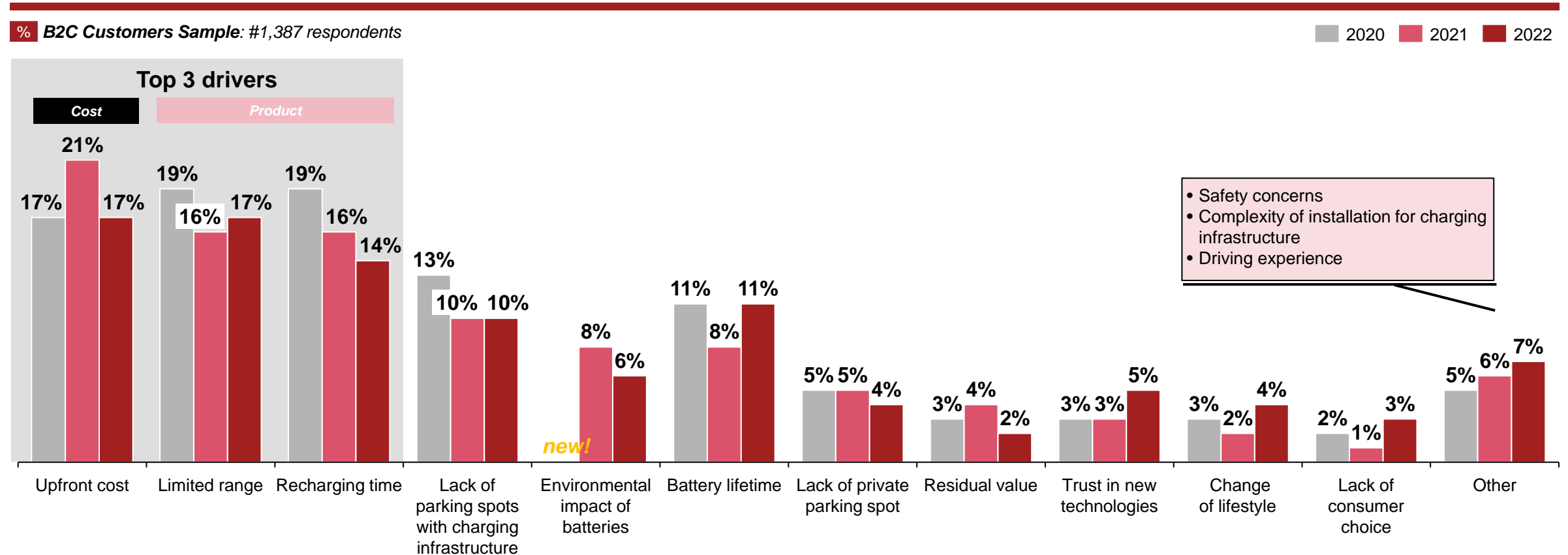
% B2C Customers Sample: #1,387 respondents    ↓↑⇌ Vs. 2021



# Key inhibitors to buy an EV are upfront cost, limited range and charging time

## Main reasons for rejection

What are main reasons that discourage you from buying an EV?





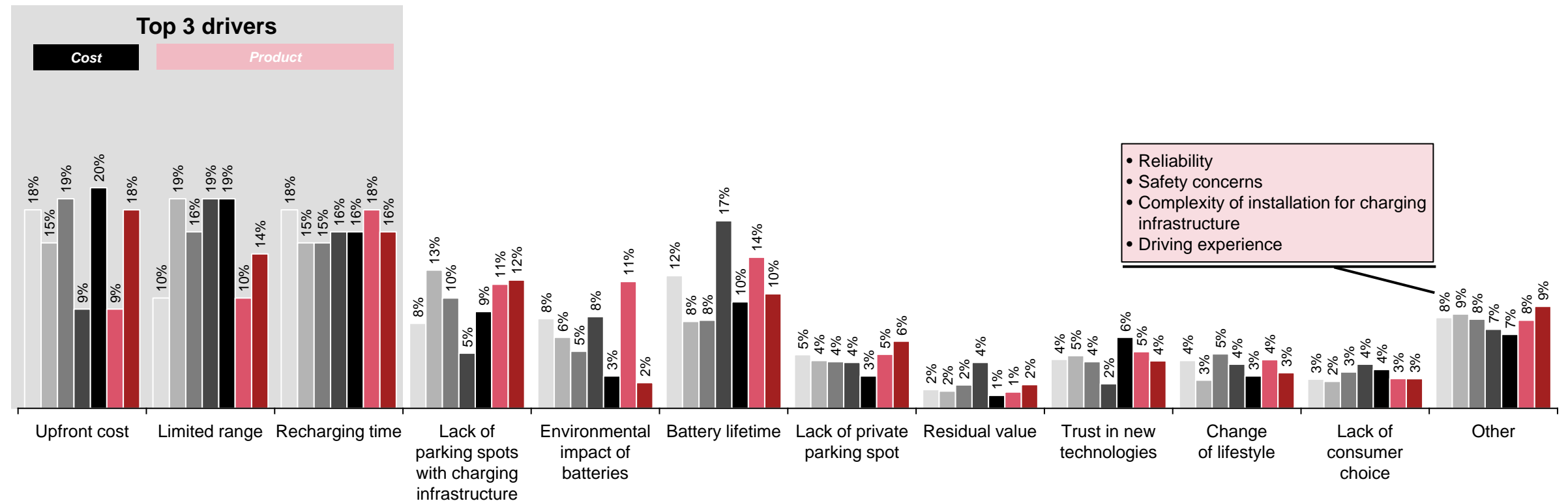
# Key inhibitors vary across EU with southern Europe put off by upfront cost while other countries by driving range and reliability

## Main reasons for rejection

### What are main reasons that discourage you from buying an EV?

% B2C Customers Sample: #1,387 respondents

France Germany Italy Norway Spain Switzerland United Kingdom



## Agenda

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1. Executive Summary
2. Consumers viewpoint
3. **eReadiness Index**
4. Recommendations on the way forward
5. Contacts



# eReadiness index of the 7 in scope countries is built upon 14 KPIs clustered in 4 main dimensions

## eReadiness index dimensions and KPIs



### Government incentives

- Analysis of specific government incentives with focus on:
  - Grants (Purchase subsidies, national and local grants, scrapping bonus)
  - VAT exemption
  - Registration tax reduction
  - Annual ownership tax exemption



### Infrastructure

- Availability of installed charging points per vehicle
- Penetration of public fast charging points (>150kW) on motorways
- Share of renewable energy produced by each country
- Ratio of gasoline vs. electricity cost



### Supply

- Penetration of EV over total registrations
- Depreciation rate of top 4 BEV sold in each country
- Number of pure EV players present in the market



### Demand

- Consumers willingness to buy an EV within the next two years
- Share of short distance (<30km per day) drivers
- Average household income by country

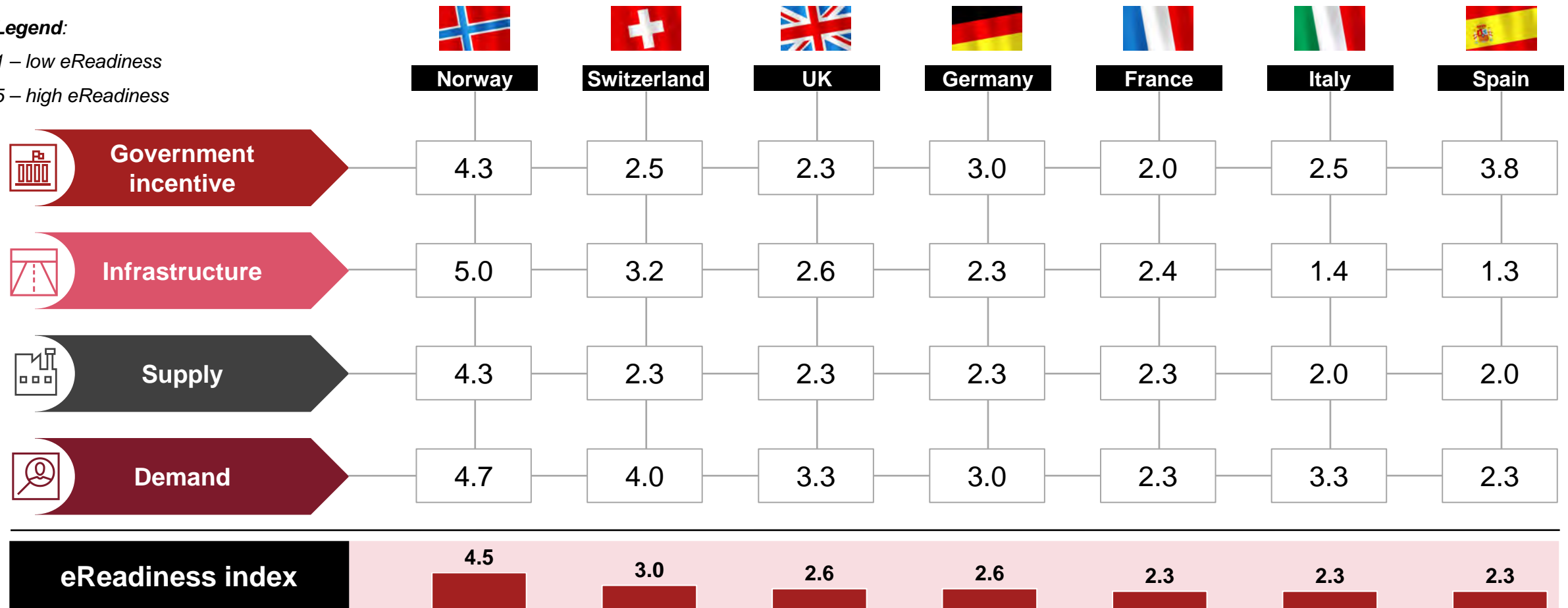
# Norway is the most *eReady* country across all dimensions while France, Italy and Spain seem the least mature for e-mobility

## eReadiness index

Legend:

1 – low eReadiness

5 – high eReadiness





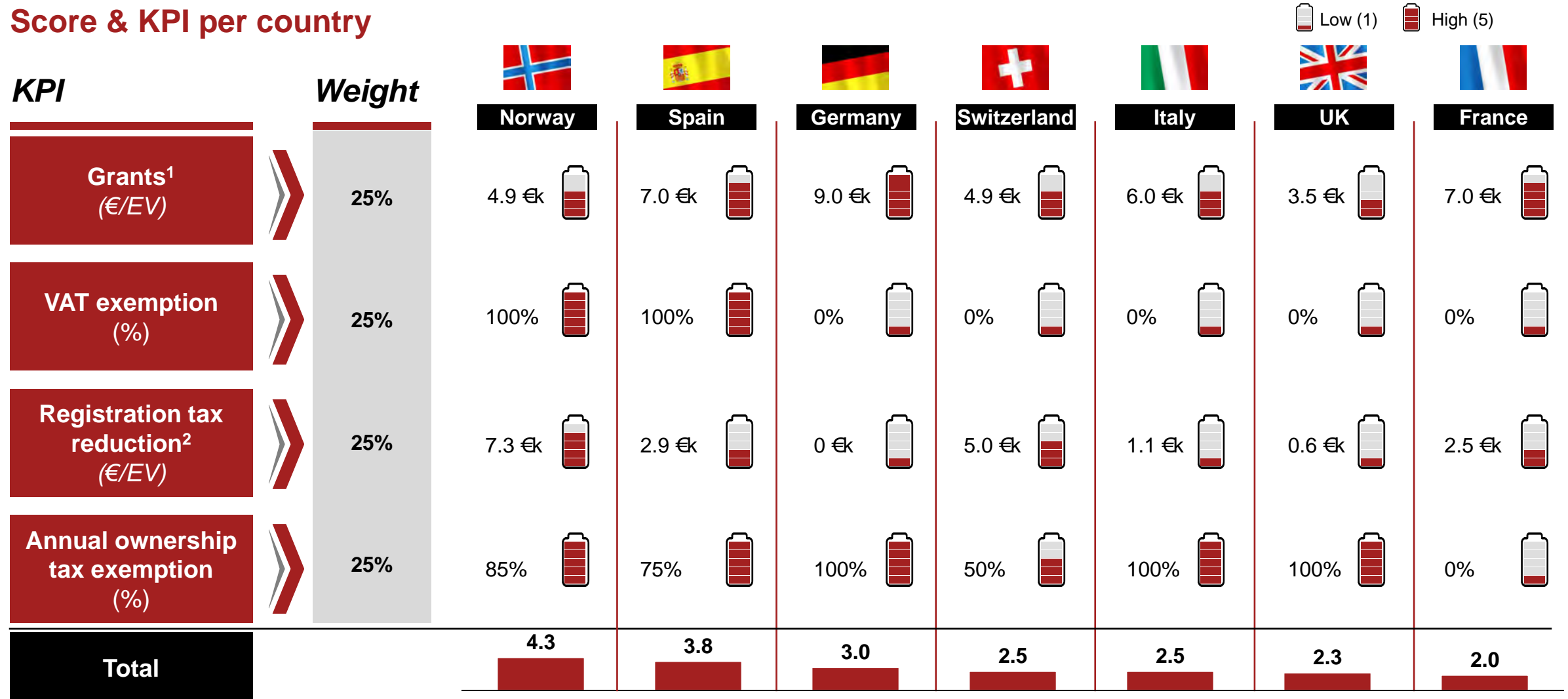
# Government incentives are measured based on consumer fiscal savings

## Dimension overview

KPI	Definition	Scoring
<b>Grants</b>	Total amount of <b>purchase subsidies, national and local grants, scrapping bonus</b> per EV granted to a consumer by the government	<b>Low (1):</b> 0–2,000€/BEV <b>High (5):</b> > 8,000€/BEV
<b>VAT exemption</b>	Exemption or reduction on <b>VAT granted</b> to a consumer when buying an EV	<b>Low (1):</b> 0–20% reduction <b>High (5):</b> > 80% reduction
<b>Registration tax reduction</b>	Exemption or reduction on <b>one-off registration taxes</b> or CO2/NOx taxes	<b>Low (1):</b> 0–2,000€/BEV <b>High (5):</b> > 8,000€/BEV
<b>Annual ownership tax exemption</b>	Total amount of <b>annual ownership tax reductions</b> granted to a consumer by the government	<b>Low (1):</b> 0–20% reduction <b>High (5):</b> > 80% reduction

# Norway and Spain provide the highest government incentives to consumers, while France the lowest

## Score & KPI per country



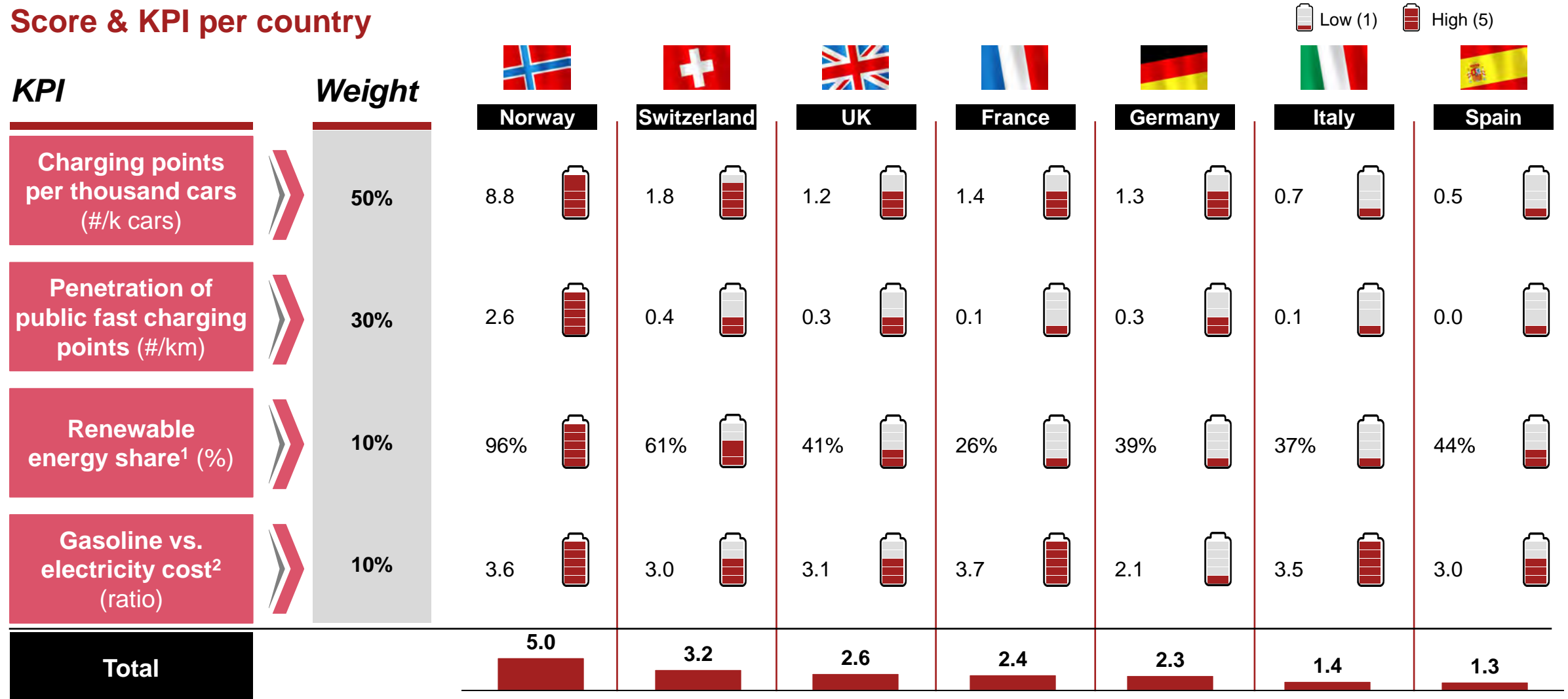
# The Infrastructure dimension measures the availability of public charging infrastructures as well as the sources and cost of electricity

## Dimension overview

KPI	Definition	Scoring
<p><b>Charging points per thousand cars</b></p>	<p>Number of <b>public charging points</b> per thousand circulating cars</p>	<p><b>Low (1):</b> <math>\leq 1</math>  <b>High (5):</b> <math>\geq 3</math></p>
<p><b>Penetration of public fast charging points</b></p>	<p>Ratio of <b>public fast charging points</b> (over 150 kW) per km of motorway</p>	<p><b>Low (1):</b> <math>\leq 0,1</math>  <b>High (5):</b> <math>\geq 1</math></p>
<p><b>Renewable energy share</b></p>	<p>Share of <b>renewable energy produced</b> (According to IEA, the following types are included within the renewable energy category: Solar PV, wind energy, hydro energy and bio energy)</p>	<p><b>Low (1):</b> <math>\leq 40\%</math>  <b>High (5):</b> <math>\geq 80\%</math></p>
<p><b>Gasoline vs. electricity cost<sup>1</sup></b></p>	<p>Ratio of <b>driving costs</b> per 100 km of ICE vs. BEV considering gasoline for ICE and slow charging for EVs</p>	<p><b>Low (1):</b> <math>\leq 2,5</math>  <b>High (5):</b> <math>\geq 3,5</math></p>

# Norway is by far the most developed country, while Italy and Spain should invest heavily to close the gap with other countries

## Score & KPI per country





# The Supply dimension measures the offer of EVs and their market penetration

## Dimension overview

KPI	Definition	Scoring
<b>EV penetration</b>	Share of <b>EVs vs. ICE</b> sold within the market (on H1 2022)	<b>Low (1):</b> $\leq 10\%$ <b>High (5):</b> $\geq 50\%$
<b>Top models annual depreciation<sup>1</sup></b>	<b>Depreciation rate</b> of top 4 selling models by country from 2018 to 2022 <sup>2</sup>	<b>Low (1):</b> $\leq -15\%$ <b>High (5):</b> $\geq -5\%$
<b>Pure EV players<sup>3</sup></b>	Number of pure <b>EV players actively selling</b> by country	<b>Low (1):</b> $\leq 1,00$ <b>High (5):</b> $\geq 5,00$

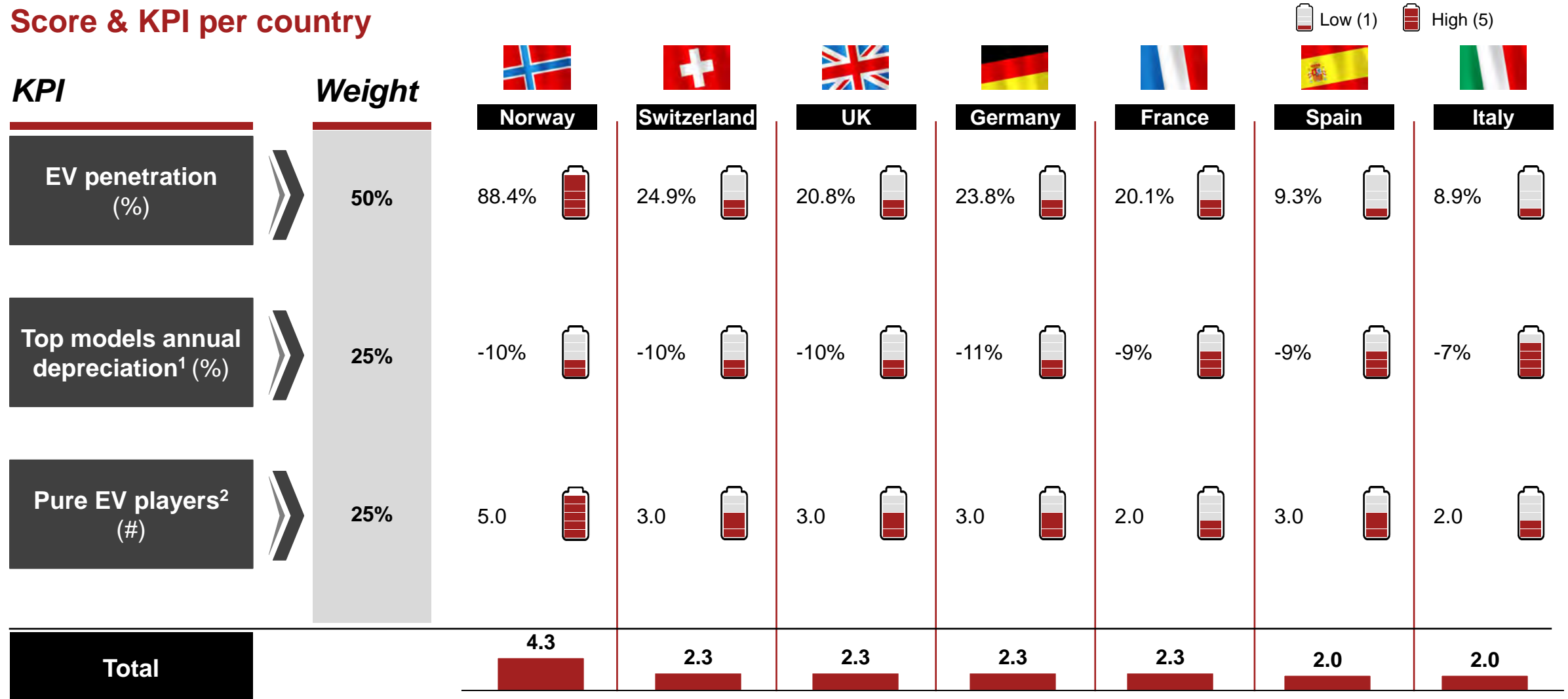
1) Within the past 5 years based on reference prices (not transaction prices)

2) Reference prices for Renault Zoe, Nissan Leaf, Tesla Model S, BMW i3 on selected platform like "mobile.de" with search terms of 1<sup>st</sup> year of registration 2018-2021 and mileage (0, 10k, 20k, 30k and above 40k kilometre)

3) NIO, XPENG, Lucid, Vinfast, Smart, Polestar, Cupra

# Norway is the best supplied market while all other countries are still struggling to attract pure EV players

## Score & KPI per country



# The Demand dimension leverages on the Strategy& eReadiness survey to grasp first hand data

## Dimension overview

### KPI

### Definition

### Scoring

**Willingness to buy**

Consumer **willingness to buy a BEV** in the next two years year (% of respondents)

**Low (1):**  $\leq 20\%$   
**High (5):**  $\geq 35\%$

**Share of short distance drivers**

Share of respondents driving **30 km or less** per day

**Low (1):**  $\leq 50\%$   
**High (5):**  $\geq 75\%$

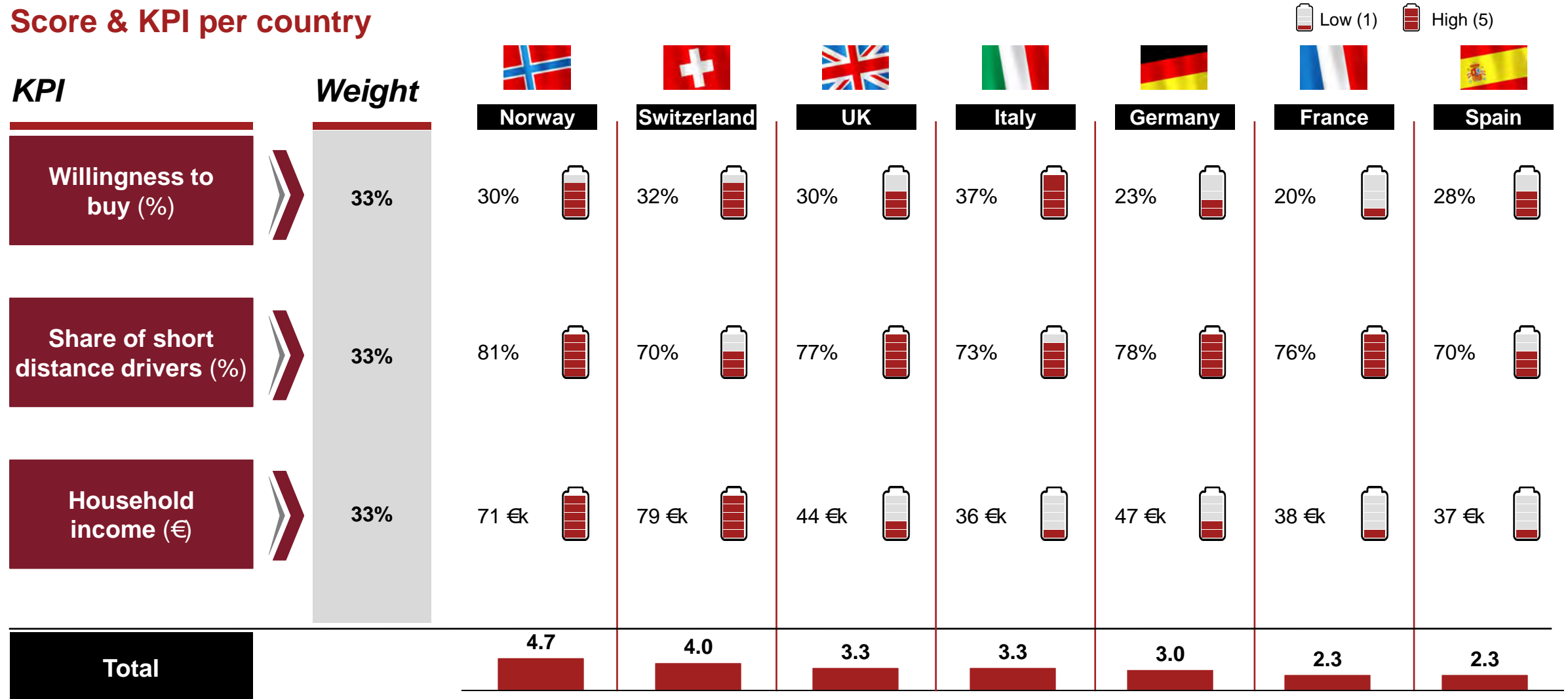
**Household income**

Average **income of consumers** respondent to the Strategy& survey

**Low (1):**  $\leq 40 \text{ €k}$   
**High (5):**  $\geq 60 \text{ €k}$

# Norway and Switzerland lead the EV demand dimension thanks to a strong willingness to buy and high household income

## Score & KPI per country



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# We have shortlisted 4 improvement actions for OEMs to tap the full potential of the EV market in the short-run

## Recommendations for OEMs

### Proposed actions

### Reasons why



#### Omnichannel journey

Integrate the traditional brick-and-mortar sales journey with a seamless online and in-car experience to meet customer expectations



- 10% of customers already bought their EV online, with 55% willing to buy their next car remotely, mainly driven by convenience and cost advantage factors
- A seamless customer experience across sales channels is more relevant as 50% of the demand in the next two years is made up of digital natives



#### Customer experience

Design and deploy EV-specific experience to make EV sales, onboarding and use more compelling - also for less tech-savvy customers – ensuring monitoring of customer feedback to identify key pain points



- EV owners' satisfaction declined by 10% in the last two years - As adoption increases, transforming the EV market into a mass market, new EV owners are less tech-savvy and expect EV-specific supports throughout the entire journey
- Word of mouth is the main consideration factor for EV owners, with test-drive experience (official and/or through friends & family) being the convincing factor



#### Pre-Owned EV business

Enhance used EV business proposition with dedicated CPO and upskilling programs to help dealerships manage the EV 2<sup>nd</sup> hand trade in a more effective and profitable way



- 20% of EV Owners bought a pre-owned vehicle mainly through the traditional dealership channel
- Dealership salesman is seen as key factor to start considering to buy a pre-owned EV with the test-drive being the most important convincing elements for pre-owned EV customers (+14p.p. vs. new EV owners)



#### Extended value proposition

Enrich current product and services portfolio offering EV-related solutions to address customers' demand (e.g. green energy contracts, photovoltaic panels, ...)



- 10-30% of consumers purchased additional EV-related products and services within a short time frame after purchasing their EV and 14% purchased private charging infrastructure separately from the car
- Few OEMs have already defined an extended value proposition including energy bundles, home solutions and additional services

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