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Public EV Charging Pricing Transparency:

Driver Survey Findings

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Supported By:

Executive Summary

In partnership with the Center for Sustainable Energy (CSE), the California Integrated Travel Project (Cal-ITP) surveyed 420 California drivers in early 2026 with experience using public EV charging. Respondents were recipients of prepaid charging cards through the California Clean Vehicle Rebate Project (CVRP), representing a population with regular exposure to public charging infrastructure.

This survey builds on Cal-ITP's prior research, which identified confusion around EV charging payments and pricing due to fragmented data, inconsistent communication, and reliance on multiple platforms. The findings presented here provide California-specific evidence of how these challenges affect driver behavior in practice.

Several key insights emerge:

- **Convenience was the primary driver of charging behavior.**
  Drivers prioritized location, availability, and ease of use over cost. Only a small share of respondents, who all received a charging subsidy, actively sought the lowest-priced option, suggesting that convenience remains a more immediate constraint than price for this cohort.
- **Pricing transparency is a persistent challenge.**
  Approximately 40% of respondents report difficulty finding cost information in advance, and up to one-quarter are unable to estimate charging costs. More than one-third experienced higher-than-expected costs, often finding out only after completing a session.
- **Charging information is fragmented and difficult to access.**
  Pricing and payment details are inconsistently displayed across platforms, often requiring drivers to rely on multiple applications. This limits drivers' ability to compare options and contrasts with the standardized pricing visibility of gasoline.
- **Market fragmentation contributes to uneven experiences.**
  Charging providers frequently prioritize proprietary platforms, resulting in inconsistent access to information and limiting price comparability across networks.
- **Drivers prefer integrated, accessible information.**
  Respondents indicated a preference for finding pricing information through general navigation tools rather than charging-specific apps, suggesting an opportunity to improve access through broader platform integration.

From a consumer protection perspective, a meaningful share of drivers is unable to reliably access or interpret pricing information before charging. This creates the potential for unexpected costs and limits informed decision-making.

Taken together, these findings indicate that while California has made progress in deploying charging infrastructure, the user experience—particularly around pricing transparency—remains a barrier. Note that the behavior observed via the survey may

differ from the broader EV-driving population, as respondents all benefited from prepaid charging credits and were therefore not paying out-of-pocket at the time they were surveyed.

Cal-ITP's prior work notes that improvements in transparency can be achieved through public-sector leadership and industry collaboration. As outlined in its February 2026 report, opportunities exist to improve data availability, standardize pricing communication, and expand access through widely used platforms. While additional research may help refine approaches, these findings indicate that the need for improved pricing transparency is already clear and warrants near-term action.

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1. Introduction

California has made significant investments to expand access to electric vehicles (EVs), particularly for low and moderate-income households. As part of this effort, in 2023 the California Air Resources Board's Clean Vehicle Rebate Project (CVRP) introduced an "Increased Rebate" in the form of a $2,000 prepaid public charging card to support low and moderate–income EV adopters who are more likely than higher income drivers to not have reliable access to charging at home, work, or school. By reducing the cost burden of public charging, the program aimed to improve the overall affordability and practicality of EV ownership.

A total of 6,212 charge cards were distributed through this initiative. These recipients represented a distinct and relevant group of drivers: individuals who rely on public charging infrastructure and who understand its benefits and challenges from regular use. As part of its broader work on mobility payments and user experience, the California Integrated Travel Project (Cal-ITP) identified this group as an opportunity to better understand how drivers navigate public charging, particularly with respect to pricing and payment transparency.

Understanding the charging experience is critical to advancing California's zero-emission vehicle (ZEV) goals. While the availability of charging infrastructure has expanded, there is growing concern that the user experience, especially around pricing, may act as a barrier to adoption. This concern is particularly relevant for lower-income drivers, who are more likely to depend on public charging and are likely more impacted by cost uncertainty and unexpected fees than higher-income drivers.

Previous Cal-ITP research has found that the pricing of public EV charging is often confusing for drivers, making it difficult to understand how much a charging session will cost, compare options across providers, and make informed decisions about where and when to charge. This complexity can limit access to charging, reduce confidence in the system, and weaken competitive dynamics in the market. While these challenges are well documented, there has been limited data on how widespread they are in practice, how they influence driver behavior, and which aspects of the experience are most impactful.

To address this gap, Cal-ITP partnered with the Center for Sustainable Energy (CSE), which administers the CVRP program on behalf of the California Air Resources Board (CARB), to conduct a survey of charge card recipients. The goal of this effort was to better understand drivers' real-world experiences with public EV charging, with a particular focus on pricing transparency and its role in shaping behavior and perceptions.

The survey ran in January 2026 and collected responses from drivers across California. By focusing on a population with direct, ongoing exposure to public charging, this research was intended to provide insight into how pricing and payment challenges manifest in everyday use—and how they may inform future policy considerations related to consumer protection and EV adoption.

2. Methodology

This report draws on survey responses collected from recipients of prepaid public charging cards distributed through the California Clean Vehicle Rebate Project (CVRP). The survey was designed to better understand drivers' experiences with public EV charging, with a particular focus on pricing transparency, access to information, and how these factors influence charging behavior.

A total of 420 responses were collected from a population of 6,212 charge card recipients. Respondents represent a subset of EV drivers with regular exposure to public charging infrastructure, relying on it as their primary charging option as well as supplemental to other options. While the survey was open to all California CVRP Charge Card recipients, the geographic distribution of the CVRP rebate recipients was concentrated in Southern California and thus the survey responses were as well.

The respondent pool is also heavily represented by Tesla drivers, who account for approximately 75% of CVRP charge card recipients and 73% of survey respondents. The Tesla charging ecosystem has unique characteristics, including a standardized user experience that is optimized for compatibility between the cars and chargers. This report analyzes certain questions both across the full respondent set and, where relevant, by segmenting Tesla and non-Tesla drivers. This approach allows for a more nuanced understanding of how charging experiences differ between these two groups.

The survey included questions related to how drivers select charging locations, how they access and interpret pricing information, and how pricing uncertainty affects their behavior. This report focuses on a subset of questions that provide the most insight into the role of pricing transparency in shaping the charging experience.

Several limitations should be considered when interpreting these findings. First, all respondents had received a prepaid charging credit of $2000, which may reduce price sensitivity compared to the broader EV-driving population. As a result, cost may play a larger role in decision-making for drivers who pay for charging out of pocket. Second, the respondent pool is not fully representative of all EV drivers in California, particularly given the high share of Tesla users and the geographic concentration of the respondent pool.[1]

Despite these limitations, the survey provides valuable insight into the real-world experiences of drivers who regularly rely on public charging. By focusing on a population with sustained exposure to charging infrastructure, the findings help illustrate how pricing transparency challenges manifest in practice and where they may warrant further attention from policymakers and industry stakeholders.

[1] Tesla represented ~52% of EV registrations in 2024, declining to ~48% in 2025 – a lower share than the survey dataset (source, source)

3. Survey Findings

The findings below provide real-world validation of challenges identified in prior Cal-ITP research and offer new insight into how pricing transparency affects driver behavior in practice. While earlier work established that pricing and payment information is fragmented and difficult to interpret, this survey highlights how drivers respond to those conditions when making real charging decisions.

Theme 1: Convenience is the primary driver of consumer behavior when finding and paying for a public charger

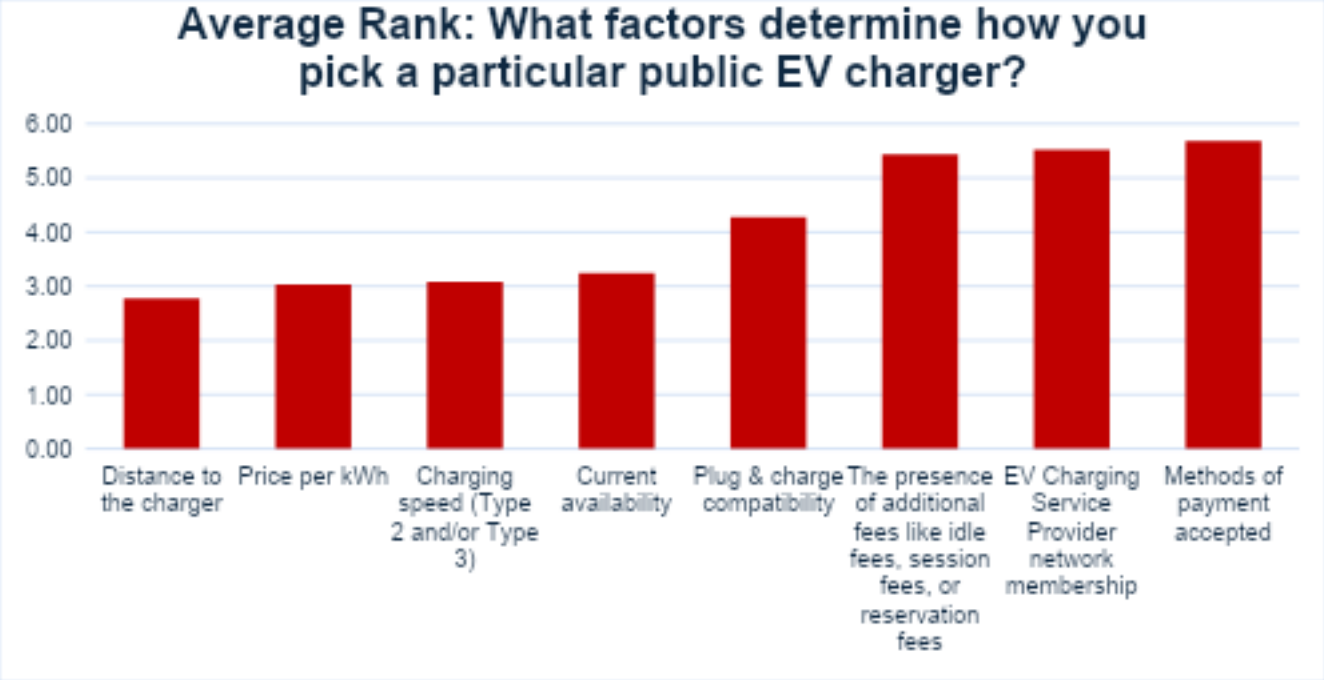

Figure 1 – Criteria for charger selection by rank

While price was the second highest choice, 4 of the top 5 reasons for choosing a particular charger were related to issues of convenience. This indicates that while pricing is a relevant factor, it is often secondary to more immediate considerations such as charger availability and ease of use.

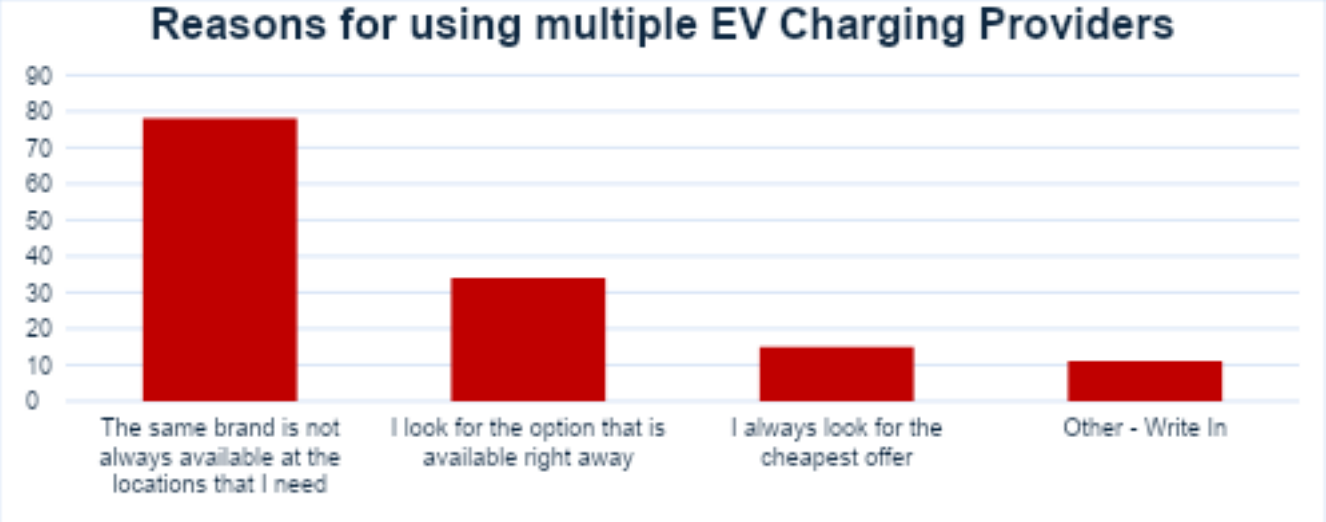

Figure 2 – Criteria for using multiple charging providers

Furthering this theme, Figure 2 shows that only around 15 respondents who use multiple charging providers stated they look for the lowest rates available. Convenience in location and real-time availability are shown to play a much larger role in consumer choices based on this survey set. This finding does not necessarily indicate that drivers are indifferent to price. Instead, it may reflect the difficulty of identifying and comparing prices across charging options. When pricing information is not readily accessible or comparable, it becomes less actionable in decision-making.

As we see in Figure 3, cheaper charging rates were ranked 8th out of 11 factors when choosing between charging options. Convenience factors like location, ease of use, and reliability were the main drivers of behavior in this group.

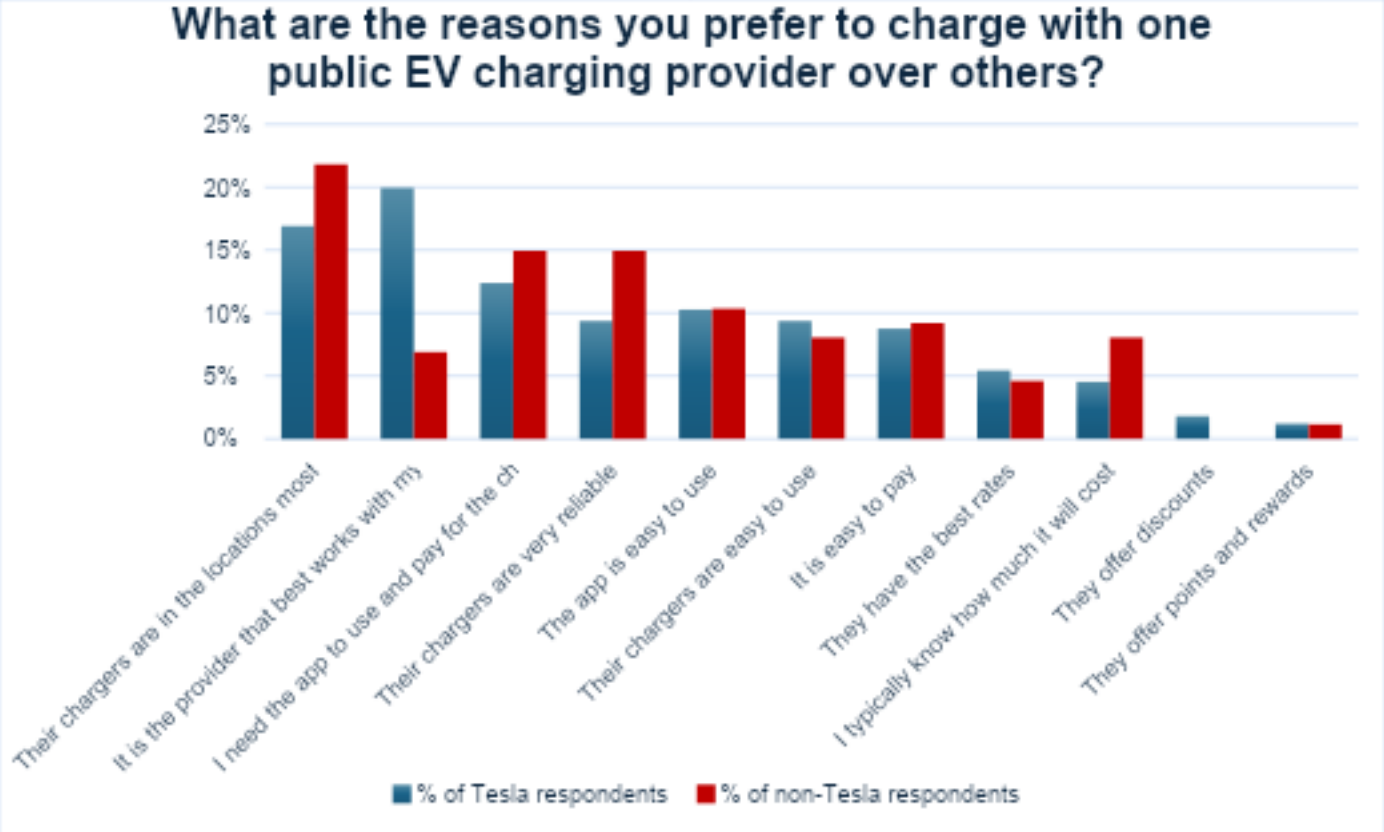

Figure 3– Criteria for selecting a certain brand of charger

This question also highlights the discrepancy in charging experience for Tesla versus non-Tesla drivers. The choice with the highest delta between the two groups was that the provider works best with their car, with Tesla owners nearly four times more likely to choose a charger for vehicle compatibility. Non-Tesla owners were also meaningfully more likely to select reliability and ability to predict price. This supports the hypothesis that Tesla owners have a more consistent charging experience and are less concerned about reliability or pricing transparency because there is a consistent experience across the Tesla network. While many EV brands are compatible with the Tesla charging network, there are both physical barriers like needing adapters to use the chargers and digital barriers like user experience (UX, e.g. screen flows) friction and unreliable connections between cars and chargers that may make non-Tesla drivers less likely to use it.

These differences point to the role of system design in shaping user experience. Tesla's vertically integrated vehicles and charging network has provided a more standardized and predictable charging experience, which may reduce the need for drivers to actively evaluate factors like reliability or pricing transparency. In contrast, non-Tesla drivers must navigate a more fragmented ecosystem, where variability across providers increases the importance of these considerations.

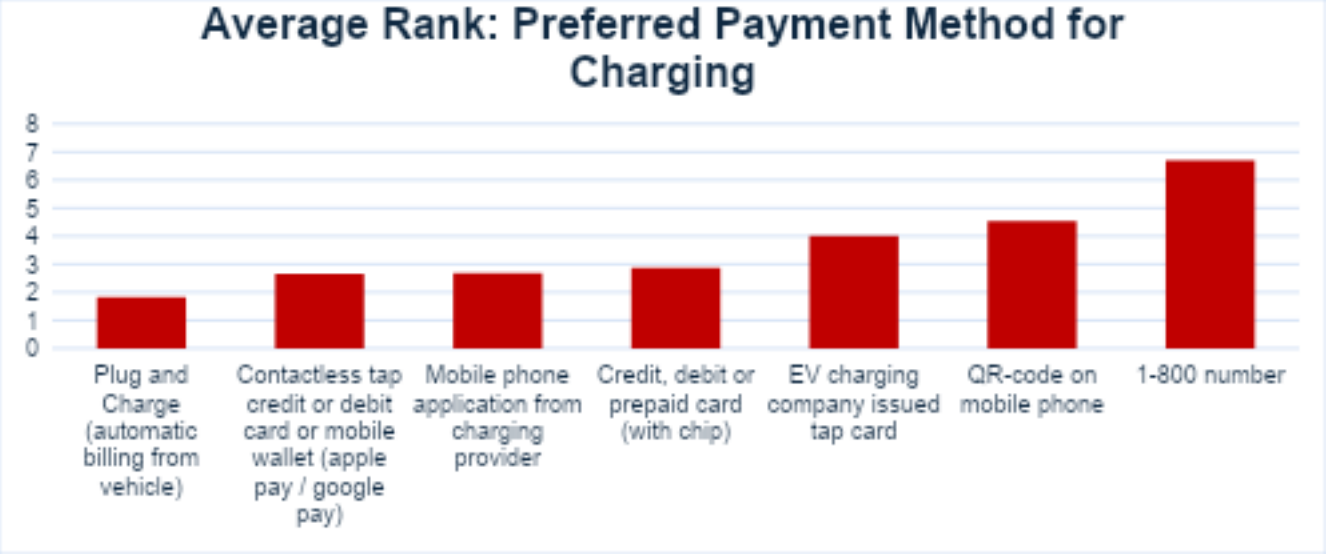

Figure 4 – Preferred payment method for EV charging

Further underscoring the importance of convenience, respondents prefer payments with as little friction as possible. Plug and Charge and Tap to Pay require the fewest steps to initiate a charging session.

Together, these findings suggest that while price is a factor in charging decisions, it plays a limited role when compared to convenience. Again, these responses may indicate the difficulty of accessing and comparing pricing information across providers.

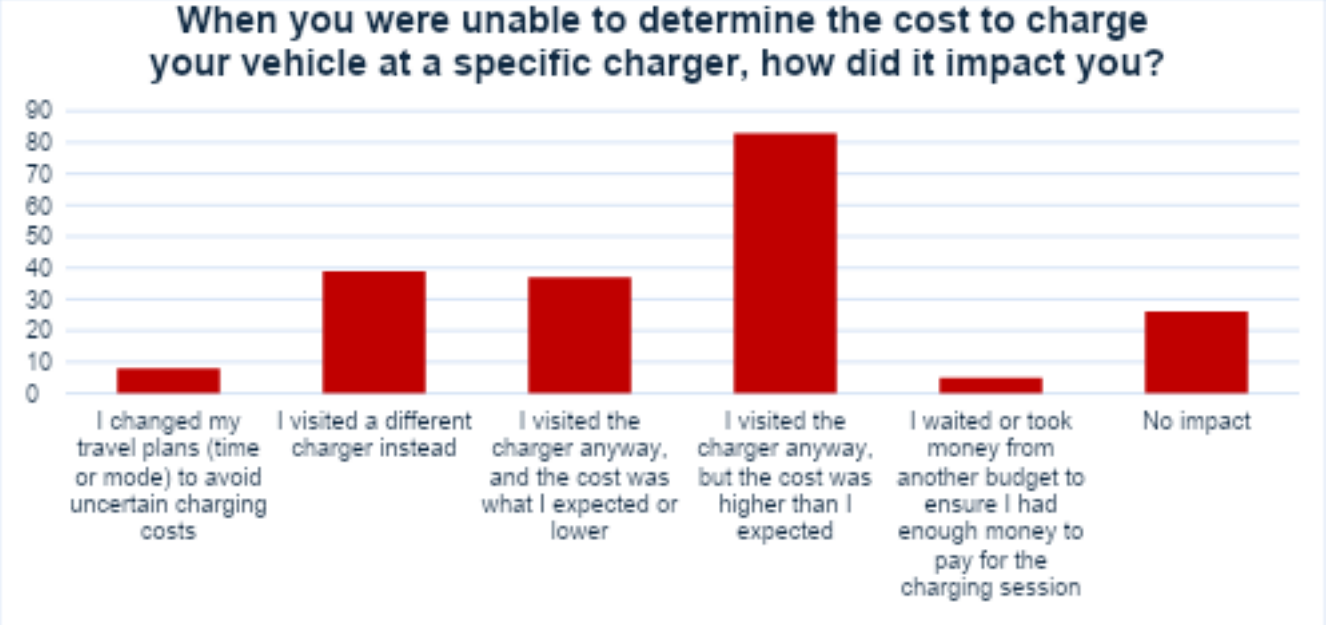

Figure 5 – Behavior after being unable to identify price before visiting a charger

In comparing the impacts of cost and convenience, an important factor is how users act when they are unable to determine price in advance. Figure 5 shows that when pricing

is unclear, only about 20% of respondents chose to visit a different charger while the other roughly 80% visited the charger anyway. It's important to note here that the respondents had all received funds for charging and thus may not be representative of EV driver behavior as a whole, especially low-income drivers without access to affordability programs or subsidies.

This finding highlights how pricing uncertainty does not consistently influence charging behavior as much as convenience factors. Even when drivers are unable to determine costs in advance, most proceed with a charging session rather than seeking alternatives. This may reflect limited substitutes, time sensitivity, or the necessity of charging to complete a trip.

From a market perspective, this behavior has important implications. When drivers are unable or unlikely to respond to price signals, competitive pressure between charging providers may be weakened. Inconsistent or inaccessible pricing information limits the ability to compare options, reducing the role of price in shaping demand across the market.

While this behavior may be influenced in part by the presence of prepaid charging credits among respondents, it highlights a broader dynamic: when pricing is difficult to access or interpret, drivers may default to convenience regardless of cost.

Theme 2: A significant proportion of respondents struggle to understand pricing in advance.

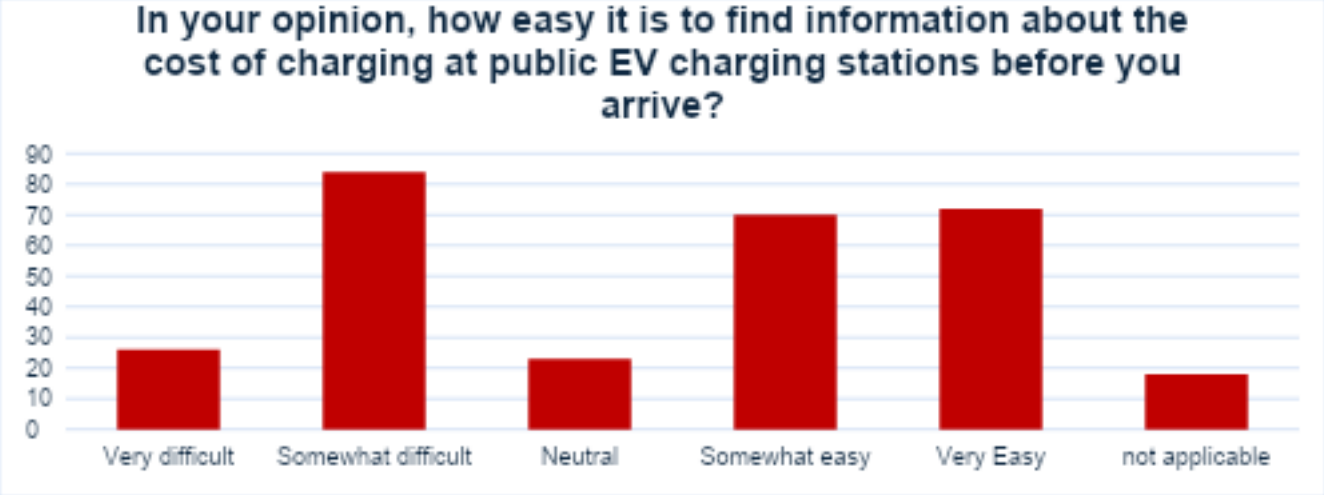

Figure 6 – Ease of finding charging pricing in advance

Roughly 40% of respondents stated it was very or somewhat difficult to find cost information before arriving at a charger. "Somewhat difficult" was the most common choice selected. Compared to the experience of finding gas prices, which are intuitively integrated into mainstream navigation apps like Google and Apple maps, as well as posted on large, legible signs at each gas station, cross-shopping chargers for price is

difficult. Further research is needed to see whether the trend in this survey is consistent with the general population of EV drivers, but it is an early warning sign that price transparency is a topic that warrants regulatory review.

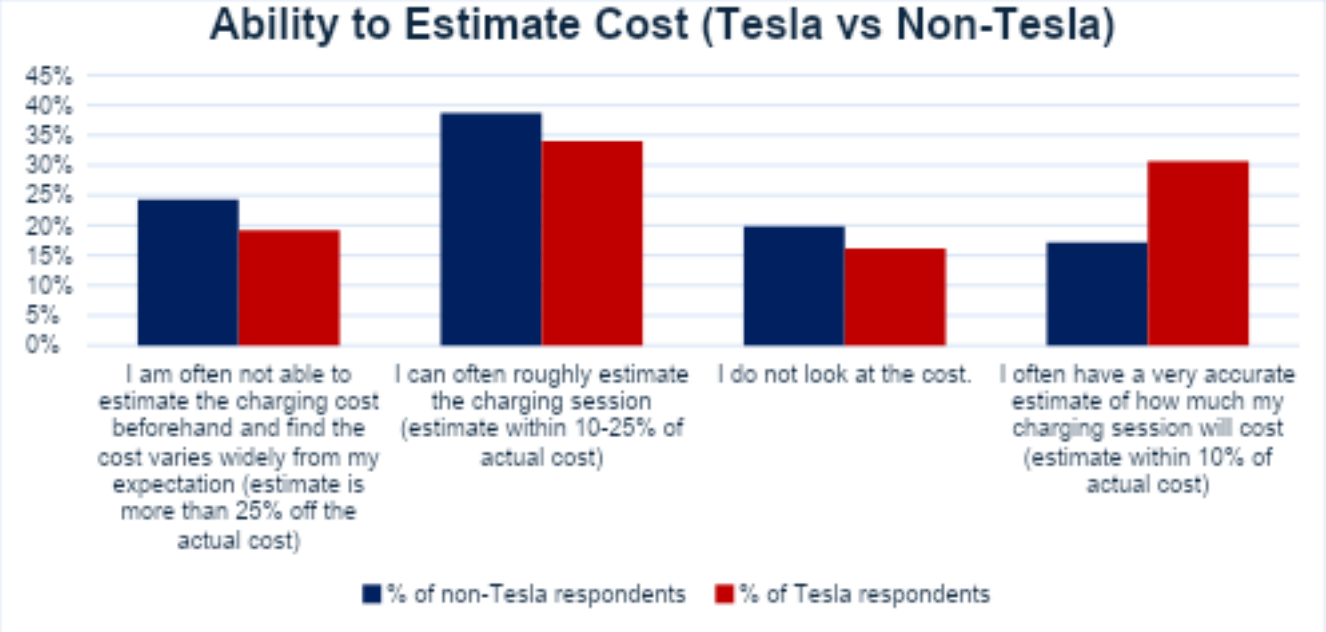

Figure 7 – Ability to estimate cost of charging in advance

As shown above, up to a quarter of respondents stated that they are often unable to estimate charging costs. Building on the previous question, this is a large enough segment of respondents that regulators would be reasonable to investigate tools to improve pricing transparency.

Figure 7 shows that roughly half of respondents report being unable to determine the cost of charging in advance. These findings provide empirical validation of challenges identified in prior Cal-ITP research, demonstrating that difficulty in understanding pricing is not only theoretical, but experienced by a substantial share of drivers in practice.

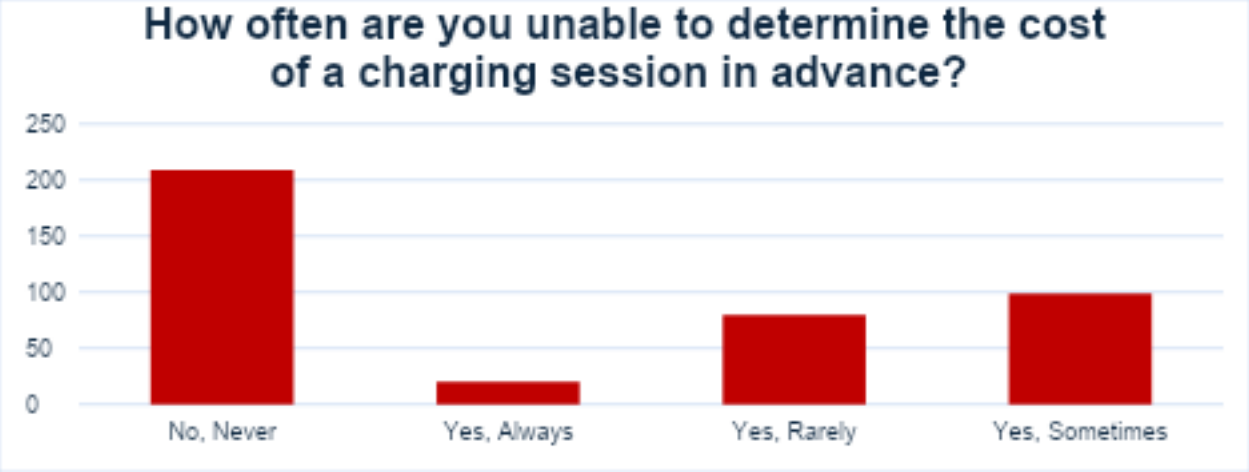

Figure 8– Frequency of inability to determine cost of a charging session

A consumer protection concern is shown above in Figure 8, i.e. that over 1/3 of respondents stated they did not learn about a higher than expected cost until they had already finished their charging session. Further research may be needed to determine what information was available to them before starting the charging session either before reaching the charger or at the charger before initiating the charge. When drivers only learn the full cost after completing a session, their ability to make informed decisions is limited.

Improving pricing transparency would protect consumers at the time of the charging session by ensuring they pay the price they expect, but also by facilitating cross-shopping price before choosing a charger. This would allow drivers to find the most affordable option in their area, and likewise would incentivize providers to compete on price, which is currently hindered by opaque pricing practices.

Taken together, the findings from Themes 1 and 2 suggest that the limited role of price in charging decisions may not reflect low cost sensitivity, but rather a lack of accessible and comparable pricing information.

Theme 3: There is meaningful demand for the better information on chargers in mainstream navigation apps. Users would prefer to not rely on charging-specific apps to see pricing when looking for a charger

The survey also asked respondents on where and how they seek EV charging information. This responses indicate there is meaningful unmet demand to see charging prices without relying on EV-specific tools. Respondents prefer to use a general mapping app, followed by a charging-specific app.

Figure 9 – Pricing messaging preferences

This finding highlights a gap between where pricing data exists and where drivers expect to find it. While pricing information may be available within provider-specific platforms, it is not consistently distributed across widely used navigation tools.

At the same time, this does not indicate that respondents are content with relying on a charging-specific app. Further research can explore people's preferred mechanism to find price disregarding the current options available. This reflects a growing expectation that EV charging information should be integrated into the same tools drivers use for navigation and trip planning. The current reliance on charging-specific applications introduces additional steps and may limit accessibility for some users.

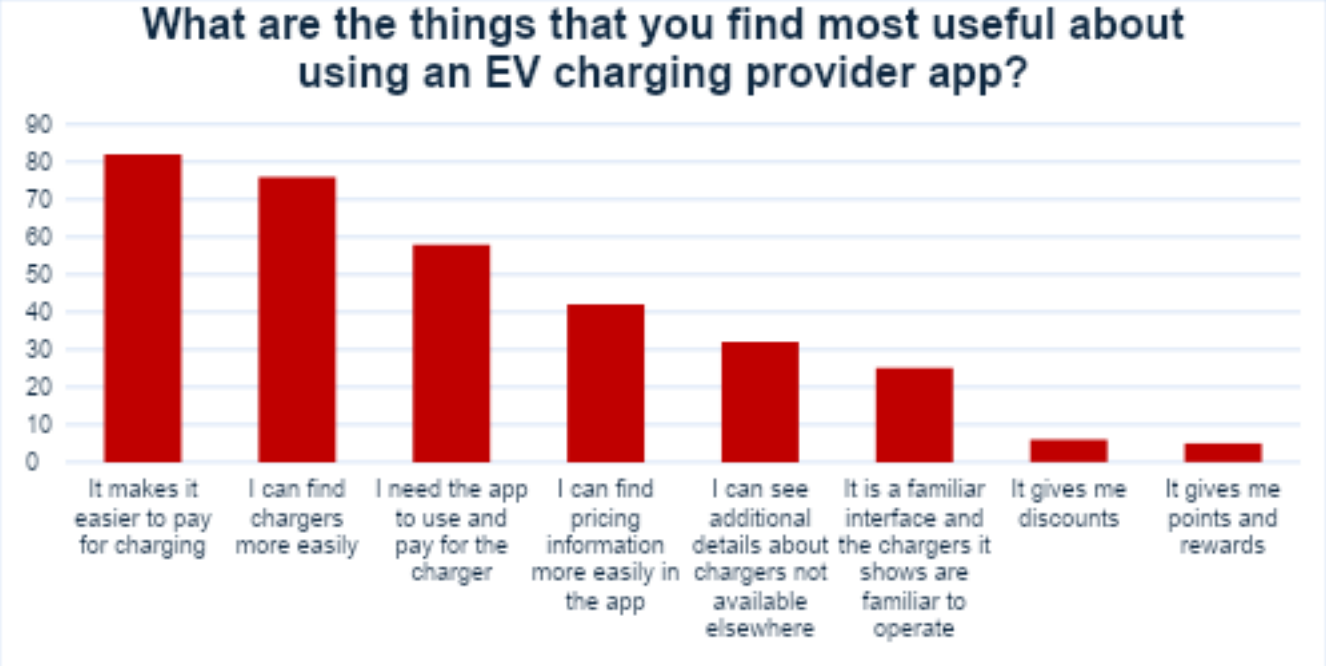

Figure 10 – Most useful features of charging apps

When asked about why they use EV charging provider apps, respondents ranked pricing information as the 4th most useful factor. Convenience factors, like paying for and locating chargers, were shown to be the more important uses of these apps. This reinforces the broader finding that convenience remains the primary driver of behavior. Even when pricing information is valued, it is secondary to functions that enable drivers to locate and initiate charging quickly.

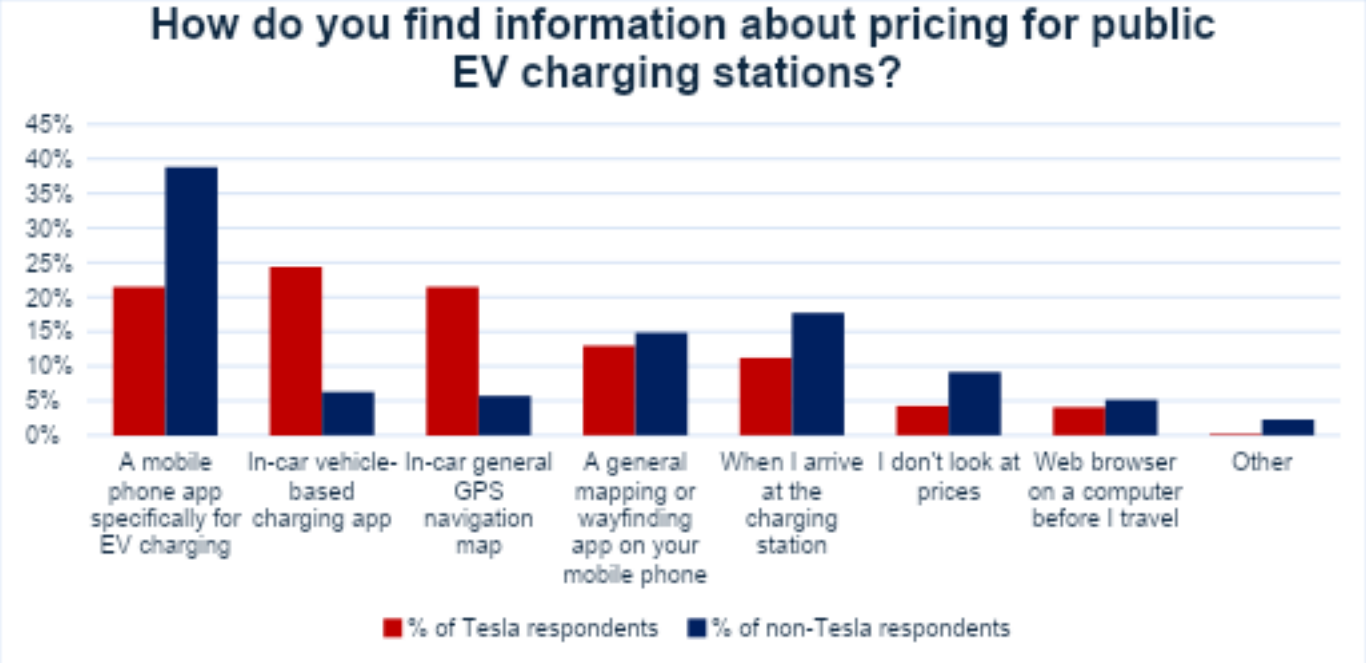

Figure 11 – How users find charging station pricing

Illustrated above, Tesla drivers have a greater ability to predict charging prices with the tools built into their car, including the Tesla mobile app. This may be due to Tesla's user-friendly in-car interface that supports price checking for the Supercharger Network. When pricing information is consistently presented within a single ecosystem, drivers are better able to anticipate costs and plan accordingly.

Improving access to pricing information within commonly used platforms may therefore be a key opportunity to enhance transparency without requiring drivers to change their behavior.

Theme 4: Hidden Fees

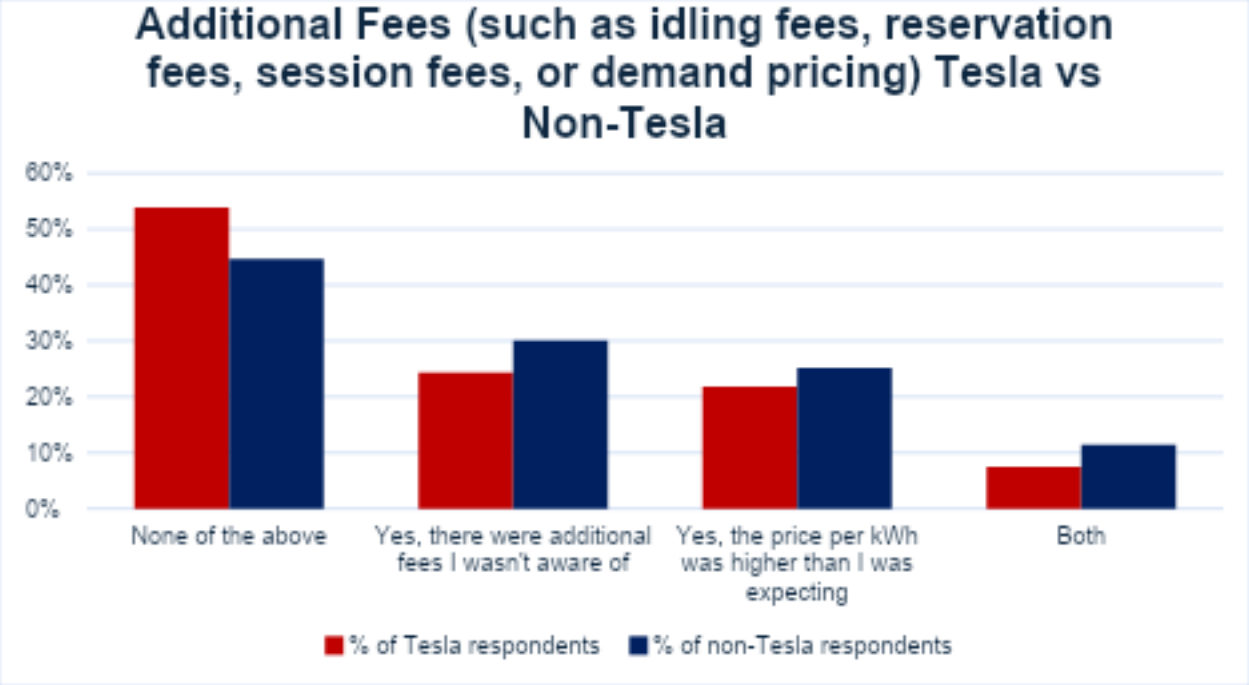

Figure 12 – Experience with fees beyond the cost of charging

Pricing transparency challenges extend beyond base charging rates to include additional fees that may not be clearly communicated in advance. These can include session fees, parking fees, and idle fees, which vary across providers and locations. As discussed in our February 2026 report, these fees are often tied to operational needs, such as encouraging charger turnover, managing demand or recovering costs, and are not inherently problematic. That said, the impact of these additional fees on drivers depends on how and when they are disclosed. When fees are not clearly communicated before or during a charging session, they can contribute to confusion and unexpected costs.

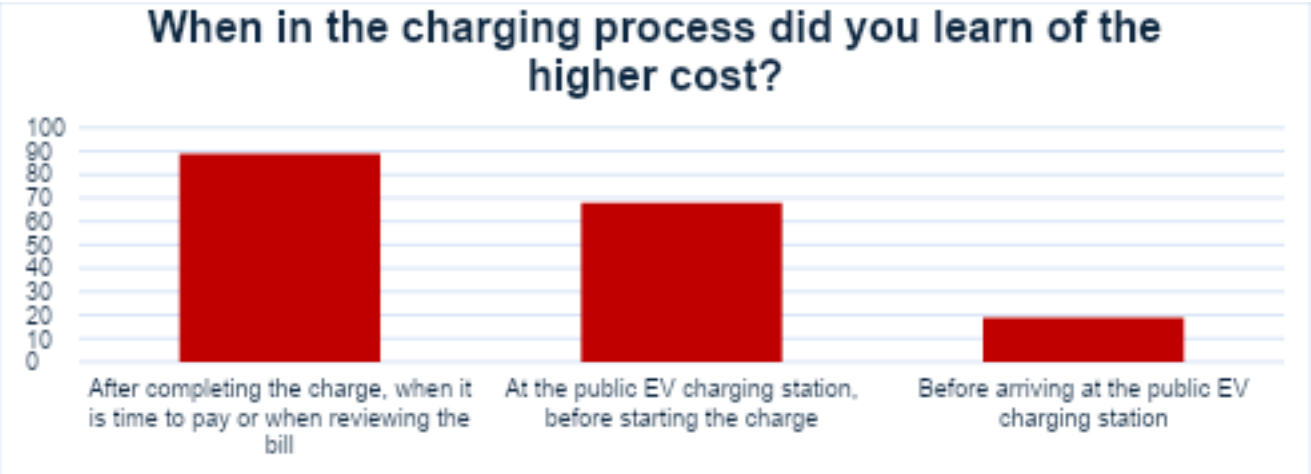

Figure 13 – When customers see final price of a charge session

Figure 13 shows that respondents almost always learn about these additional fees late – only once they have arrived at their chosen charger or, even worse, after having finished charging. This issue aligns with broader regulatory attention to so-called "junk fees," where charges are technically valid but insufficiently disclosed upfront. In the context of EV charging, Cal-ITP wants to reemphasize that the concern is not the existence of fees, but rather the timing and clarity of their communication.

Ensuring that all components of pricing are clearly presented before a charger is selected or at minimum before a charging session begins may be an important step toward improving transparency and reducing the risk of unexpected costs for drivers.

4. Conclusion

The findings from this survey reinforce a central challenge in California's transition to electric vehicles: while charging infrastructure continues to expand, the user experience around how price is communicated remains inconsistent and, for many drivers, difficult to navigate.

Across the survey results, a clear pattern emerges; drivers currently prioritize convenience when choosing where to charge, often proceeding with a charging session even when pricing information is unclear or unavailable. At the same time, a substantial share of respondents reported difficulty finding or interpreting pricing in advance, and many experienced unexpected costs after charging. Taken together, these dynamics imply that while today, and for these subsidized drivers, price may not be the primary driver of behavior, the lack of transparency presents a meaningful consumer protection concern.

These challenges are compounded by a fragmented information environment. Pricing and payment details are inconsistently communicated across platforms, and drivers frequently rely on multiple applications to access incomplete or difficult-to-compare information. Unlike gasoline, where prices are prominently displayed and easily comparable across locations, EV charging requires drivers to actively seek out pricing information across multiple platforms. This creates additional friction and limits the ability to make informed choices prior to charging.

The results also highlight differences in charging experiences across networks. Tesla drivers reported more consistent and predictable experiences, while non-Tesla drivers were more likely to encounter variability in reliability, pricing clarity, and ease of use. This contrast underscores the role that system design and data integration can play in shaping user experience.

From a consumer protection perspective, this survey data shows that a meaningful share of drivers is unable to reliably access or understand pricing information prior to charging. This limits their ability to make informed decisions and creates the potential for unexpected costs, both of which disproportionately impact low-income drivers, who are more likely to depend on public charging and to be more sensitive to cost uncertainty.

Cal-ITP's research to date indicates that, without some degree of intervention, the market alone is unlikely to resolve these challenges in a timely or consistent manner. Charging providers have strong incentives to prioritize their own platforms and customer relationships, which can limit the availability and standardization of pricing information across the broader ecosystem. At the same time, there are clear opportunities to improve transparency in ways that align with industry interests, particularly through better data sharing, more consistent communication standards, and improved integration with widely used navigation tools.

As outlined in Cal-ITP's February 2026 report on EV charging pricing transparency, progress can be made through coordinated action between the public sector and industry. This includes improving the availability and quality of pricing data, standardizing how pricing is communicated to drivers, and ensuring that key information is accessible across multiple platforms, not just proprietary applications.

Importantly, while additional data collection and analysis may help refine specific approaches, the findings presented here indicate that the core challenges are already well understood. Addressing them does not require waiting for perfect information. Near-term, collaborative steps to improve pricing transparency can help strengthen consumer trust, support more informed decision-making, and advance California's broader goals for equitable EV adoption.

5. Acknowledgements

Cal-ITP would like to thank the Centre for Sustainable Energy (CSE) for contributing to this project, as well as the survey respondents themselves. We also thank CARB for its ongoing partnership, and, with its sister state agencies, its leadership in North America's EV transition. We look forward to continuing this important work together.