

HOSPITALITY VENUE EV SURVEY REPORT 2024



In partnership with



SERVICES FOR TOURISM



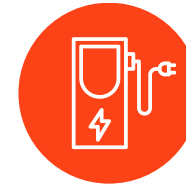
BRITISH INSTITUTE OF INNKEEPING



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Summary of Key Findings



40%

of venues surveyed have an EV charger installed currently



66%

have had guests ask for EV charging when booking or arriving



58%

see themselves installing EV chargers in the next 5 years



28%

don't have a public EV charger within 6 miles of their venue

VoltShare's Hospitality Venue EV Survey 2024

The accelerating adoption of electric vehicles is reshaping the future of transportation. At VoltShare, we're committed to driving this change and ensuring that the hospitality industry plays a pivotal role in shaping the future of electric mobility.

Our Hospitality Venue EV Survey 2024 delves into the current state of EV charging infrastructure within the UK's hospitality sector. By surveying 161 venues, we've gained valuable insights into the availability of charging facilities and future plans for expansion.

This is the first of many industry reports we hope to publish as the adoption of EVs continues to accelerate. By sharing our findings and fostering open dialogue, we aim to empower the hospitality industry to make informed decisions and contribute to a more sustainable future.

I firmly believe that collaboration is key to unlocking the full potential of electric vehicles. By working together, we can overcome challenges, accelerate adoption, and create a more sustainable future.

I extend my sincere gratitude to our partners—the Association of Scottish Self Caterers, Services for Tourism, and the BII—for their invaluable support in making this survey a reality.

I hope this report provides you with valuable insights and inspires you to join us on this exciting journey. If you have any questions or would like to explore potential partnerships, please don't hesitate to reach out.

Sheng Liu

CEO - VoltShare



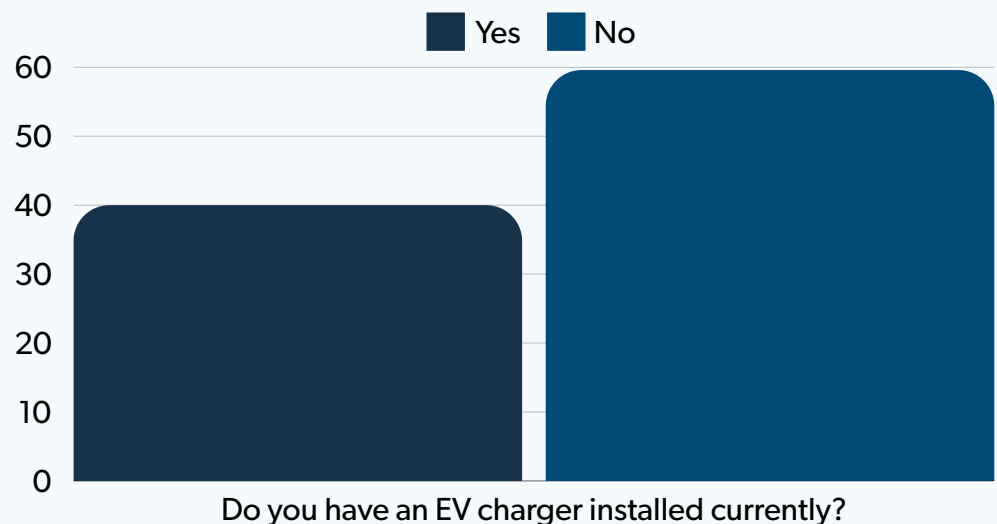


Do you have an EV charger installed currently?

A significant 40.4% of surveyed hospitality venues currently have EV chargers installed, indicating a growing recognition of the need to accommodate electric vehicle users. However, a substantial majority (59.6%) of venues do not yet have charging infrastructure in place.

While this finding highlights a positive trend in the industry's adoption of EV charging, it also underscores the significant potential for further growth. The relatively low penetration of EV chargers suggests that many venues have yet to capitalise on the opportunities presented by the increasing popularity of electric vehicles.

Given the rapid acceleration of EV adoption and the increasing consumer demand for charging infrastructure, we anticipate a substantial increase in EV charger installations within the hospitality sector in the coming years. As government policies continue to promote electric vehicles and consumer awareness grows, venues that offer convenient and reliable charging facilities will gain a competitive edge.



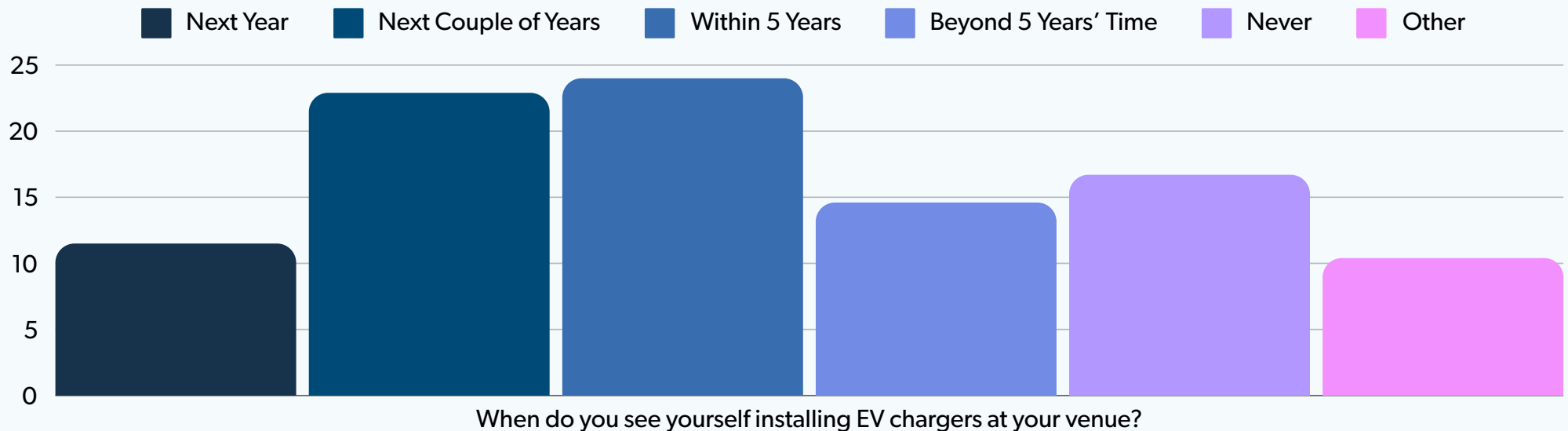
When do you see yourself installing EV chargers at your venue?

This question was asked to all participants who indicated that they do not currently have EV chargers installed. These results indicate a strong positive outlook for EV charger installation within the hospitality sector. A significant portion of respondents (46.9%) expressed their intention to install chargers within the next five years, with 22.9% aiming to do so in the next couple of years and 11.5% targeting the next year. The combined data from these two questions suggests that 75% of hospitality venues will have EV chargers within the next five years. This demonstrates a clear understanding of the growing demand for EV charging infrastructure and a proactive approach to accommodating this need.

However, a notable 16.7% of respondents indicated they would never install EV chargers. This group may represent venues with specific constraints, such as limited parking space or budget limitations. It's important to consider these factors when developing strategies to encourage wider adoption of EV charging infrastructure.

The 'Other' category provides additional insights. Some respondents highlighted challenges such as leased parking spaces or lack of direct control over parking areas. These responses suggest that certain venues may face obstacles in the installation process, which could potentially delay or prevent the adoption of EV charging.

It is crucial for the hospitality industry to stay informed about the latest developments in EV technology and charging infrastructure. By proactively addressing the needs of EV drivers, venues can position themselves as leaders in sustainability and enhance their appeal to a growing segment of the market.



Have you ever had guests specifically ask for EV charging when booking or arriving?

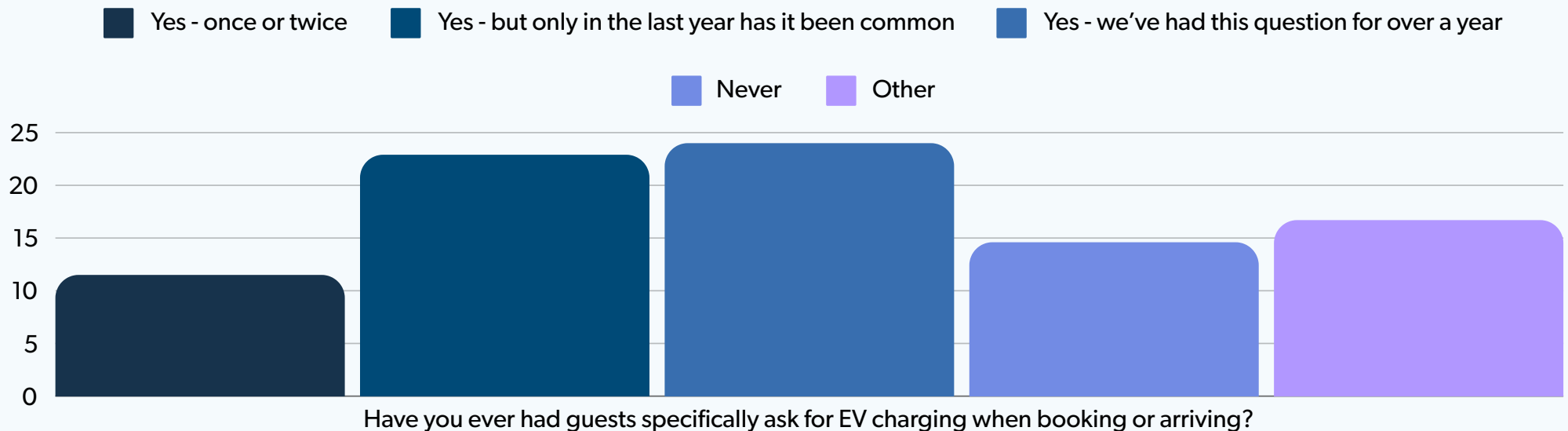
The survey results provide valuable insights into the growing demand for EV charging infrastructure within the hospitality industry. A significant portion of respondents (32.3%) have encountered this request once or twice, indicating that EV charging is becoming an increasingly common consideration for guests.

Furthermore, 27.3% of respondents have been fielding this question for over a year, suggesting that the demand for EV charging has been steadily growing over time. This trend is further reinforced by the 6.8% of respondents who have only observed a recent uptick in EV charging inquiries within the past year.

Based on these findings, it is clear that the demand for EV charging facilities is on the rise. As EV adoption continues to increase, it is reasonable to expect that the frequency of such requests will continue to grow.

This trend is likely to be driven by a combination of factors, including:

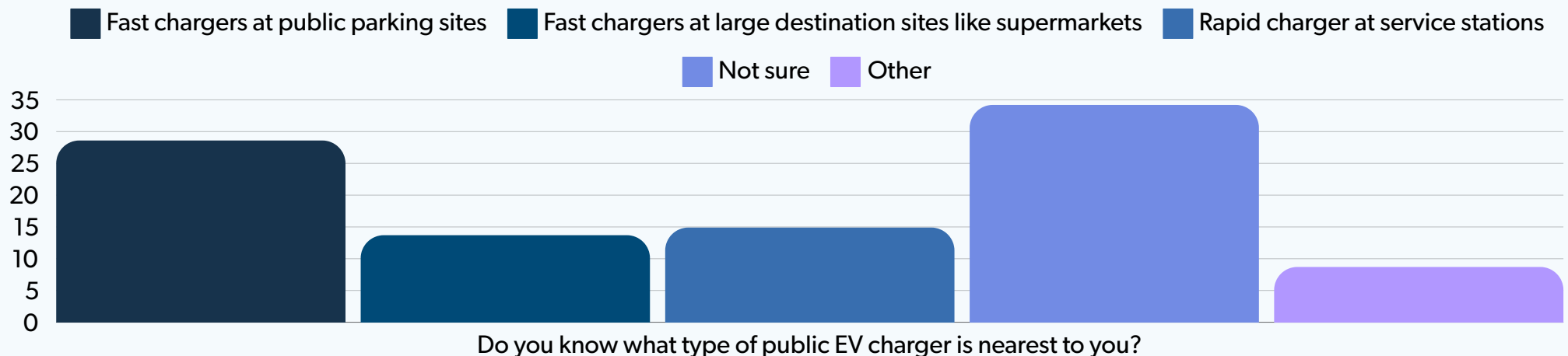
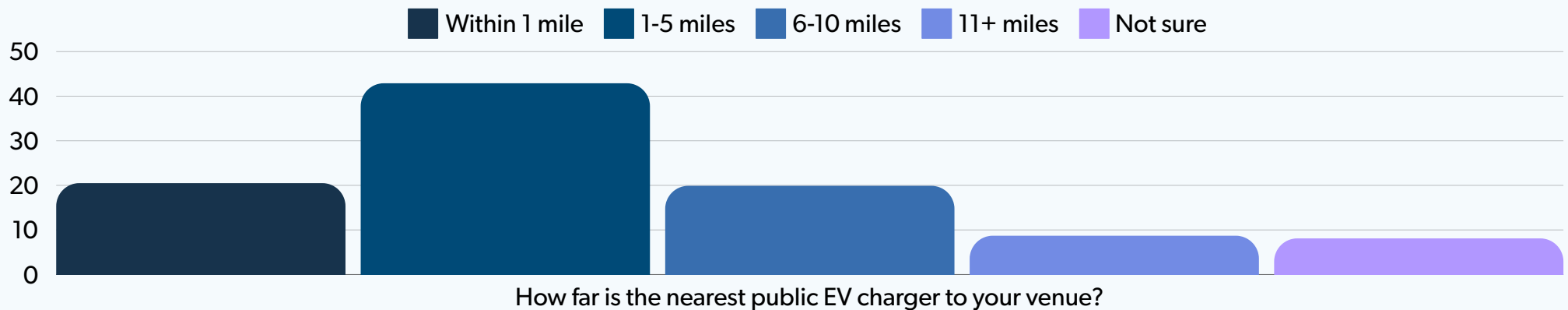
- Increasing EV ownership: As more and more people purchase electric vehicles, the demand for charging infrastructure will naturally increase.
- Growing environmental consciousness: Many consumers are increasingly concerned about environmental issues and are looking for ways to reduce their carbon footprint. EV charging is one way to do this.
- Government policies: Labour Government policies promoting EV adoption, such as tax incentives and subsidies, are also driving demand for charging infrastructure.



How far is the nearest public EV charger to your venue? Do you know what type of public EV charger is nearest to you?

The survey results indicate that the majority of respondents (63.4%) have public EV chargers within a 10-mile radius of their venue. While this suggests a reasonable level of accessibility for EV drivers, it's important to note that a **significant proportion (26.8%) are located further than 10 miles away**. This highlights the need for **continued expansion of the charging infrastructure**, particularly in areas with lower charger density.

Regarding the types of public EV chargers, a considerable number of respondents (34.2%) expressed uncertainty about the type of charger nearest to their venue. This suggests **a lack of awareness or understanding** of the different charging speeds and their suitability for various EV models. Among those who were aware, fast chargers at public parking sites were the most common type (28.6%), followed by rapid chargers at service stations (14.9%).



Hospitality Venue EV Survey Conclusion

The survey findings in this report offer valuable insights into the current state of EV charging in the hospitality sector. While many venues have yet to install chargers, **there is a growing recognition of the need for such facilities**, especially in rural areas where public charging options are scarce. However, the lack of chargers at numerous venues underscores the need for increased investment and infrastructure development to meet the rising demand.

A key challenge facing the sector is the variability in timelines and uncertainties surrounding the installation of EV chargers. **Some venues face obstacles** such as leased car parks or limited facilities, which can delay the implementation of charging solutions. Moreover, the cost of installing and maintaining charging infrastructure can be a significant barrier for many businesses.

To overcome these challenges, **collaboration between the hospitality sector, government agencies, utilities, and technology providers like VoltShare is essential**. Government incentives, such as subsidies and tax breaks, could help businesses invest in EV charging infrastructure, while utilities can offer affordable electricity rates. Technology providers can also play a crucial role by offering user-friendly, non-leased charging solutions.

DEMAND FOR EV CHARGERS MAY
SOON OUTWEIGH THE SUPPLY WITHIN
THE UK'S HOSPITALITY SECTOR

Looking ahead to 2025, several trends are expected to shape the future of EV charging in the hospitality sector. The increasing adoption of electric vehicles (EVs) and growing demand from environmentally conscious guests **will likely prompt more venues, particularly in rural and tourist areas, to install chargers**.

The quantity of chargers available at hospitality venues is also expected to expand, reflecting the increasing EV fleet in the UK. Additionally, the public EV charging network is expected to grow, providing more chargers at convenient locations and reducing dependence on on-site charging.

The policies of the new Labour government, particularly those focused on climate change and sustainable transport, **could further accelerate the development of EV charging infrastructure in the hospitality sector**. Potential policy initiatives—such as subsidies, incentives, stricter regulations, and extended deadlines for current grants—could create a more favorable environment for businesses to invest in EV charging solutions.

In conclusion, **the hospitality industry is increasingly recognising the importance of EV charging as a key factor in attracting and retaining guests**. By investing in EV charging infrastructure, venues can position themselves as sustainable, forward-thinking businesses. With market demand, government support, and technological advancements working in tandem, the growth of EV charging in the hospitality sector is expected to accelerate well into 2025 and beyond.

Why choose VoltShare?

It's clear from this report that the demand for EV charging infrastructure within the hospitality sector is rapidly growing. The number of electric vehicles on the road is continuing to rise, as too is the need for convenient and reliable charging solutions.

VoltShare offers a comprehensive EV charging solution **designed to meet the unique needs of sustainability-minded hospitality venues** and holiday rentals.

VoltShare's innovative **pay-as-you-go business model** allows you to generate revenue from every charge, helping offset the initial investment in the charging infrastructure and providing a valuable additional income stream. The user-friendly mobile app makes it easy for guests to use and pay for charging sessions, **enhancing the overall guest experience** and reducing the burden on your staff.

VoltShare offers comprehensive support, including installation, maintenance, and customer service. Our team of experts will guide you through the entire process, ensuring a smooth and hassle-free experience. With **24/7 driver support**, we're always on hand to help.

By choosing VoltShare, you can **future-proof your business and capitalise** on the growing demand for EV charging. Our comprehensive solution offers a range of benefits that can help you attract new customers, enhance your brand reputation, and generate additional revenue.



**AUTOMATED PAYMENTS
FOR GUESTS**



**PAYBACK FROM
6-12 MONTHS**



**PAY-AS-YOU GO WITH
NO SUBSCRIPTION**

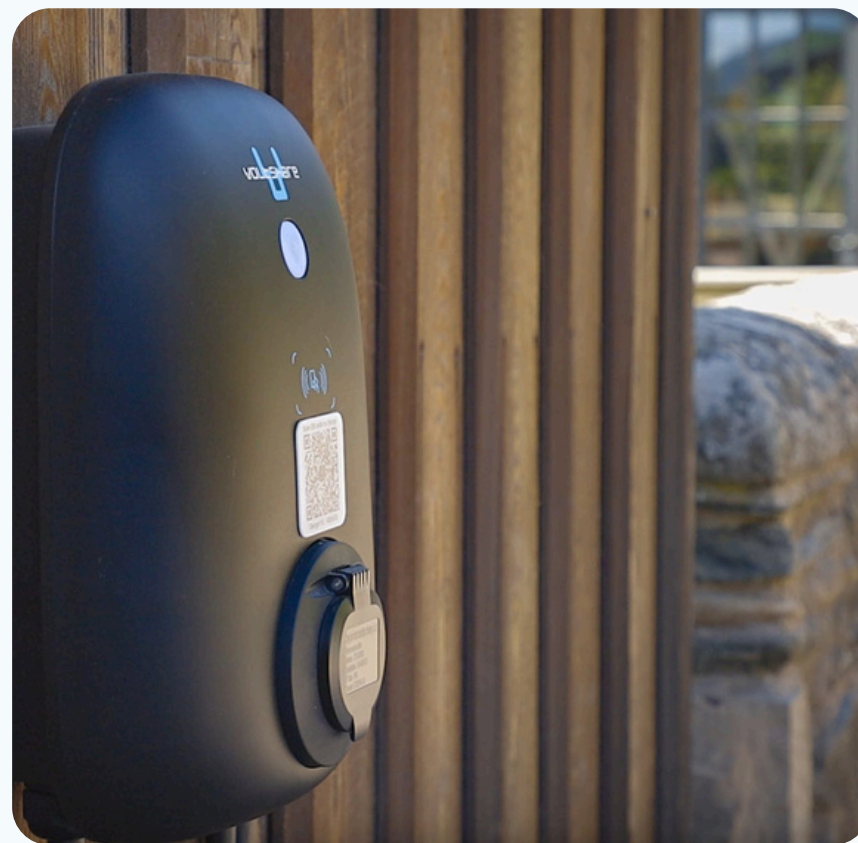


Any Questions?

We invite you to reach out if you have any questions or would like to learn more about the opportunities a VoltShare partnership can offer.

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Methodology

Interviews for the 2024 VoltShare Hospitality Venue EV Survey were conducted in September and October 2024, using an email invitation to an online survey. This was shared by three partners to their databases: ASSC, Services for Tourism and BII. We sampled a total of 161 hospitality venues in the UK.

Disclaimer: The sample size for this survey is limited and may not accurately reflect the views of the entire hospitality sector.