USCALE

Excerpt

Electric car after-sales study 2022

The after-sales process from the perspective of e-car drivers.

UScale GmbH
www.uscale.digital

Initial situation

USCALE

eCars need fewer workshop services. At the same time, they need software updates, users have more hotline needs and the cars have to be integrated into a new ecosystem.

This means that after-sales has no less of an influence on user satisfaction and the recommendation of a brand than a combustion engine.

Manufacturers and workshops must therefore adapt not only to a new technology, but also to the changed expectations of users.

EV After-Sales Study 2022

Target group

Sample:

– Owners and drivers of fully electric cars

– Total sample: N = 2005

– Holding period: ∅ 2.5 years

Survey:

– Survey: online

– Countries: German-speaking countries (89%Germany)

– Recruitment: UScale Panel

– Interview duration: 10 - 15 min
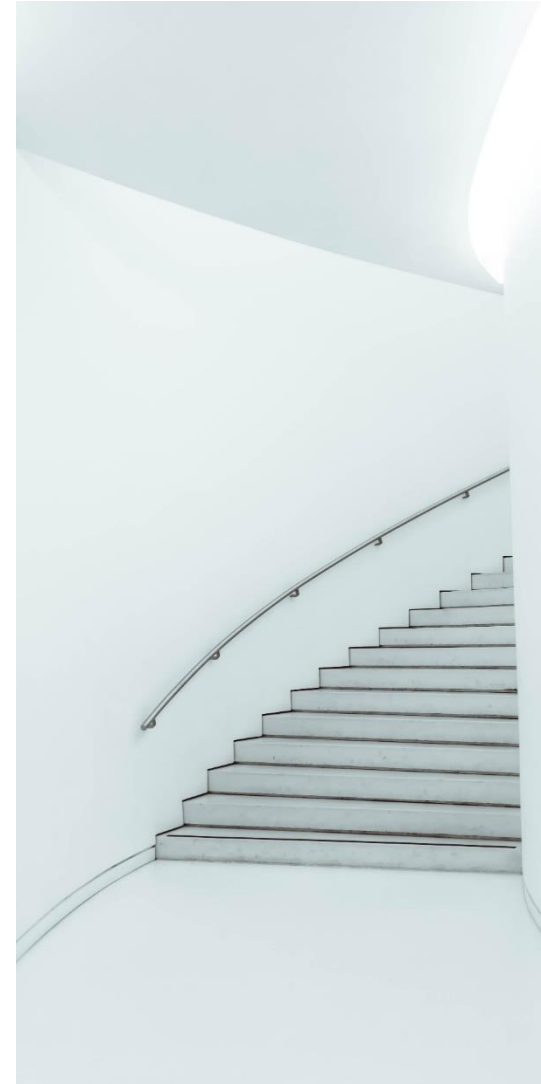
– Field phase: May - June 2022

Content

Sample
Driving performance
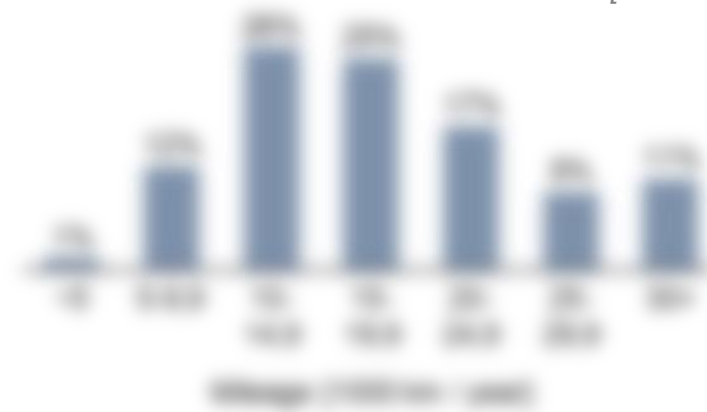
"Approximately how many kilometres do you drive your [brand + model] per year?"
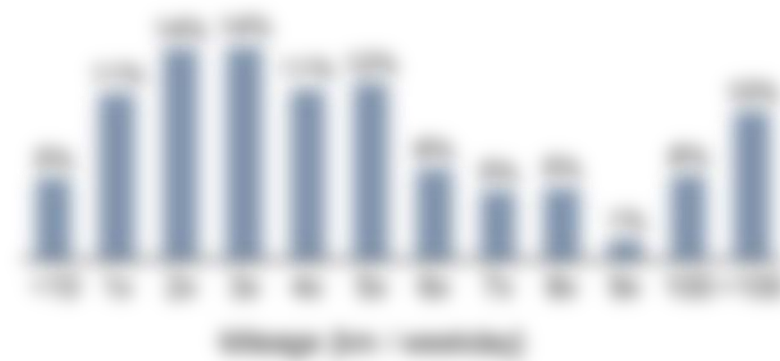
"What is your mileage with your [brand + model] on an average weekday?"

Content
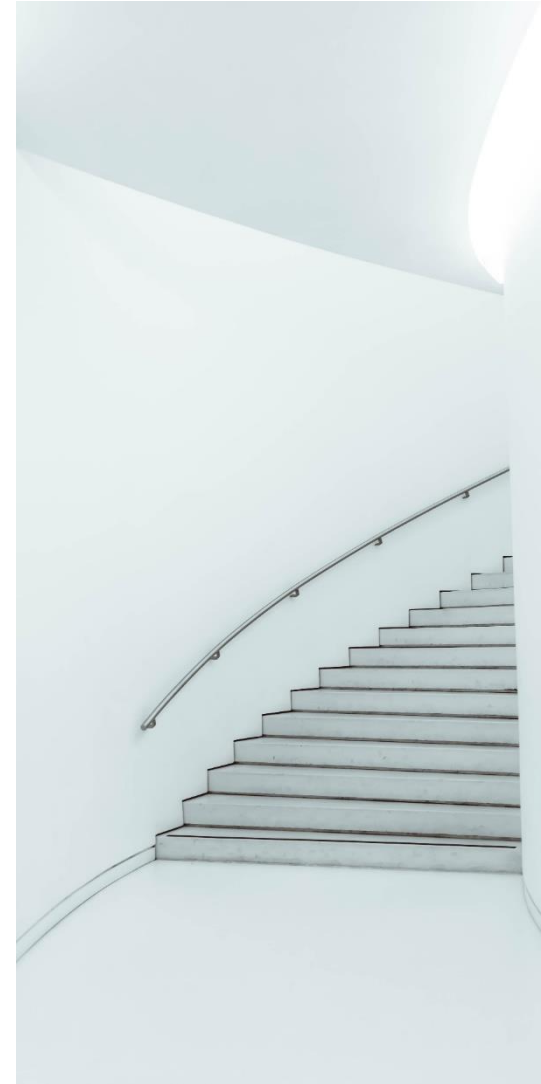
Workshop
Service type

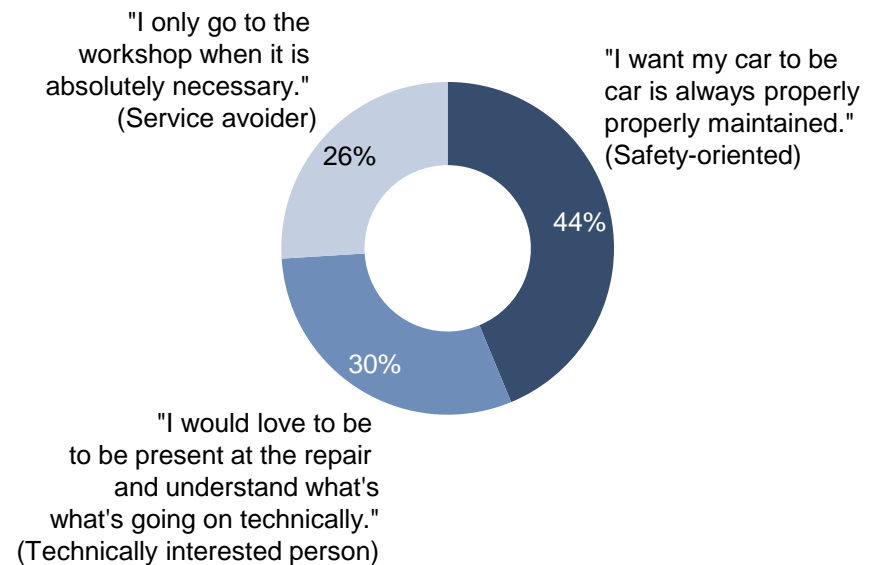*Three different "workshop types".*

The majority of respondents attach importance to their car always being properly maintained.

Just under a third have a high level of interest in the technical details and background.

A quarter belong to the "workshop avoiders".

"Which statement describes you best?"

"I only go to the workshop when it is absolutely necessary." (Service avoider)

"I want my car to be car is always properly properly maintained." (Safety-oriented)

26%

44%

30%

"I would love to be to be present at the repair and understand what's what's going on technically." (Technically interested person)

Workshop
Work carried out

Majority maintenance and repairs, but also many recalls.

"Regarding your last visit to [brand] workshop:
What work was done on your [brand + model] in the process?"
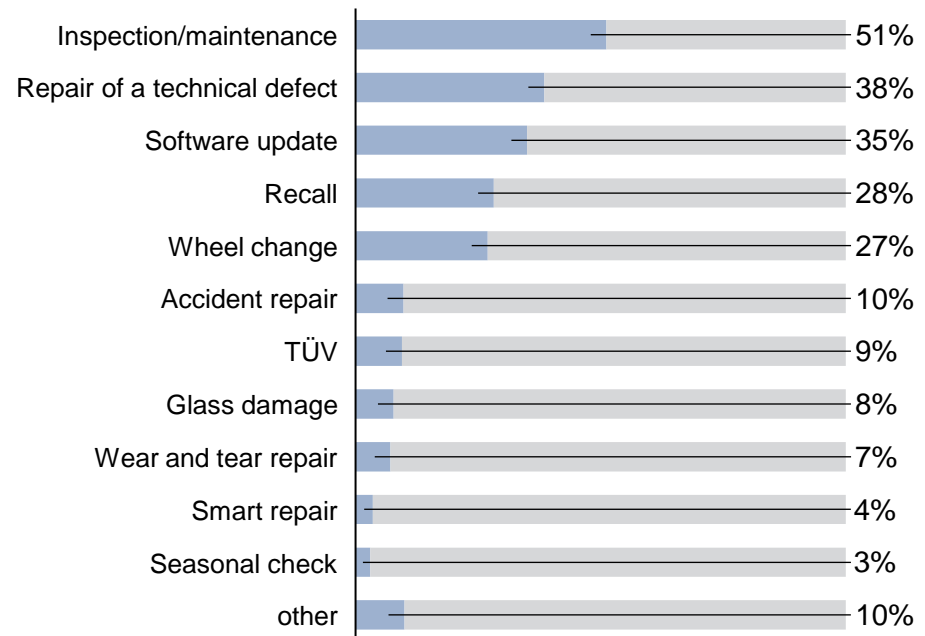*(Multiple answers possible)*

As expected, maintenance and technical repairs are the most frequent occasions for a visit to the workshop.

More surprising, however, is that one in three has already had to go to the workshop for a software update.

The recall rate of just under 30% is also strikingly high.

Among the others, mainly delivery deficiencies that have still been corrected and installation of accessories, such as trailer couplings, are mentioned.

Inspection/maintenance	51%
Repair of a technical defect	38%
Software update	35%
Recall	28%
Wheel change	27%
Accident repair	10%
TÜV	9%
Glass damage	8%
Wear and tear repair	7%
Smart repair	4%
Seasonal check	3%
other	10%

Contact workshop

"How did you get in touch with the workshop?"

Workshop
Preferred contact workshop

"And how would you prefer to contact the workshop in the future?"
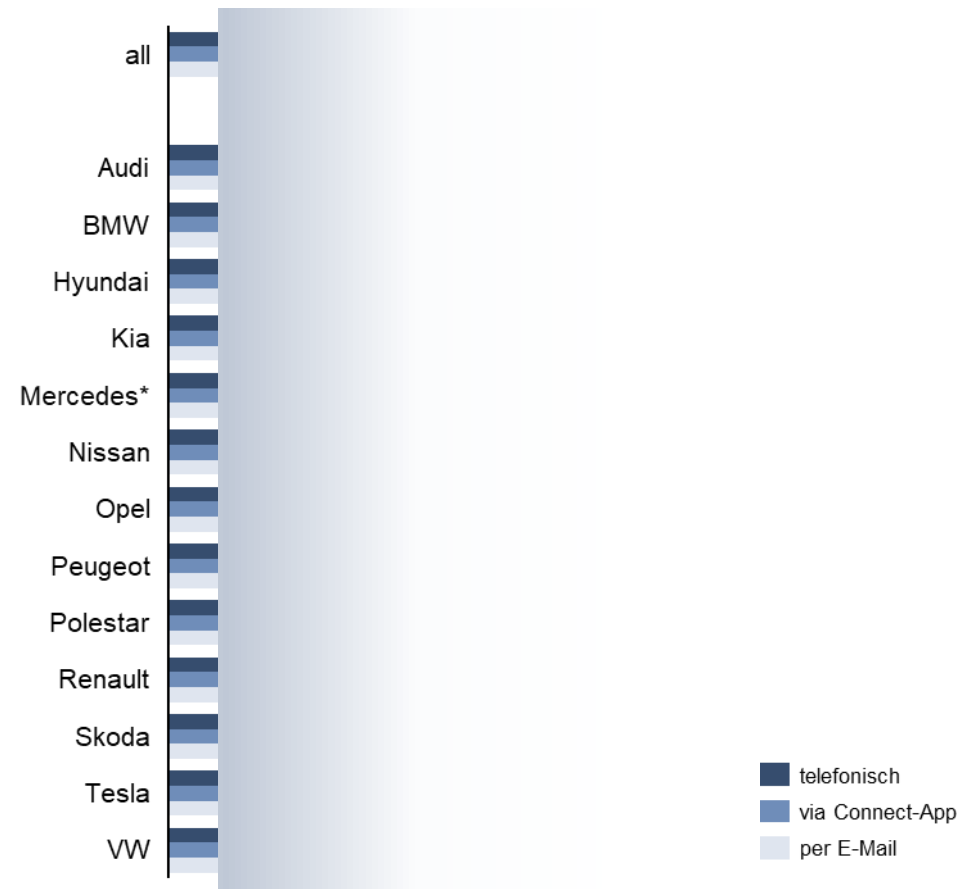
(multiple selection possible)

Preferred contact workshop (by brand)

Big differences between the brands.

"And how would you prefer to contact the workshop in the future?"

(multiple selection possible)

all

Audi

BMW

Hyundai

Kia

Mercedes*

Nissan

Opel

Peugeot

Polestar

Renault

Skoda

Tesla

VW

■ telefonisch
■ via Connect-App
□ per E-Mail

Workshop
Execution on schedule

Satisfaction workshop

"How satisfied were you with ... at the last workshop visit?"

Satisfaction workshop (by brand)

"How satisfied were you with the workshop overall during your last workshop visit?"
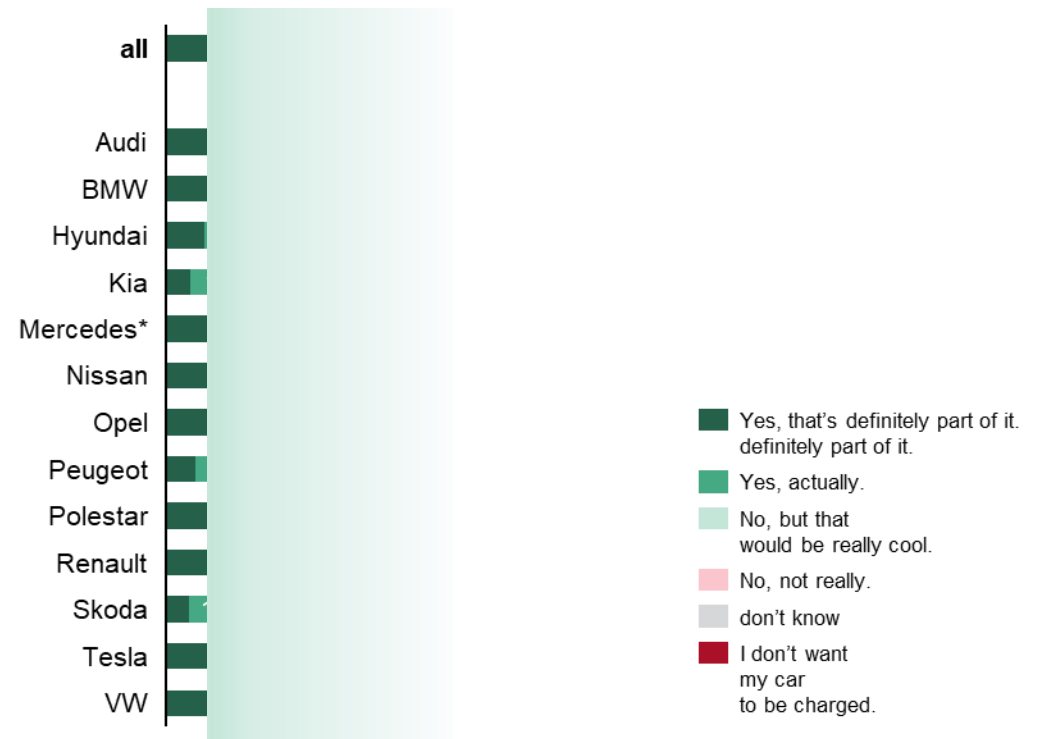
Workshop
Expectation shop (by brand)

"Do you have an expectation that your [brand] will be fully charged free of charge when it is serviced or repaired?"

| | Yes, that's definitely part of it. definitely part of it. |
| Yes, actually. |
| No, but that would be really cool. |
| No, not really. |
| don't know |
| I don't want my car to be charged. |

* small sample (N = 28)

Purchase confirmation workshop

Surprise at Tesla and Polestar.
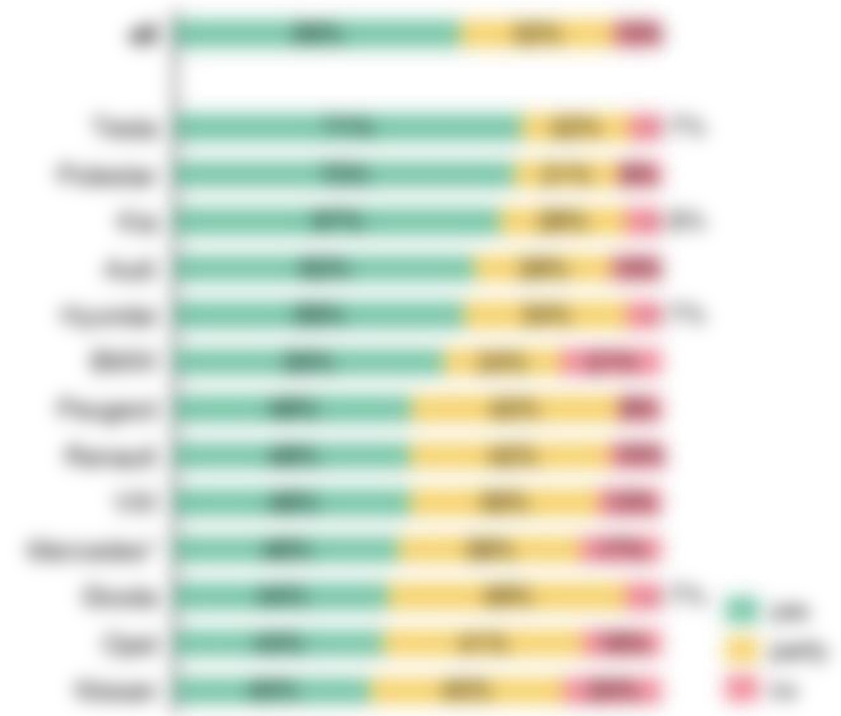
Net Promotor Score (NPS) Workshop

Potential for almost all brands

"How likely is it that you would recommend your [brand] workshop to a friend or colleague?"

Recommendations

Content

Service hotline
Contact

One in two with contact (attempt).

"Have you ever had contact with [brand]'s central customer hotline?"

Around half of the respondents had already needed to contact their brand's hotline at some point during the average 2.5 years of holding.

One in 25 of these failed to make contact.

no
51%
47% yes
2%
tried in vain
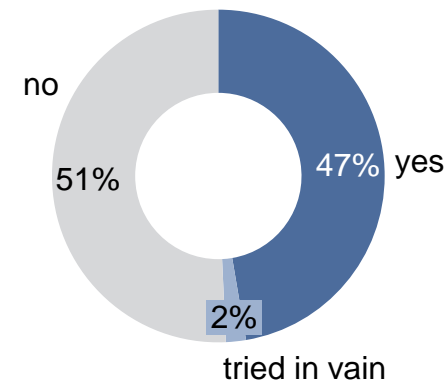
Service hotline
Reason for contact

Many technical problems and requests.

"What was the reason for your contact?

(Multiple answers possible)

As expected, most enquirers have technical problems.

But concrete enquiries also account for just under 40% of contacts.

Still, every ninth person contacts the hotline because of a breakdown.

Reason	Percentage
technical problem	56%
Enquiry on a specific topic	38%
Breakdown	11%
other	15%

Reason for contact (technical problem)

Reason for contact = technical problem

(N = 463)

Service hotline
Contact (by brand)

Hotline needs for all brands.

"Have you ever had contact with [brand]'s central customer hotline?"

The need for a hotline contact varies greatly.

In general, it can be assumed that users are not interested in frequent contact with the hotline. Nevertheless, a high contact rate does not automatically have to be problematic.

all	
Audi	
BMW	
Hyundai	
Kia	
Mercedes*	
Nissan	
Opel	
Peugeot	
Polestar	
Renault	
Skoda	
Tesla	
VW	

yes
tried unsuccessfully
no
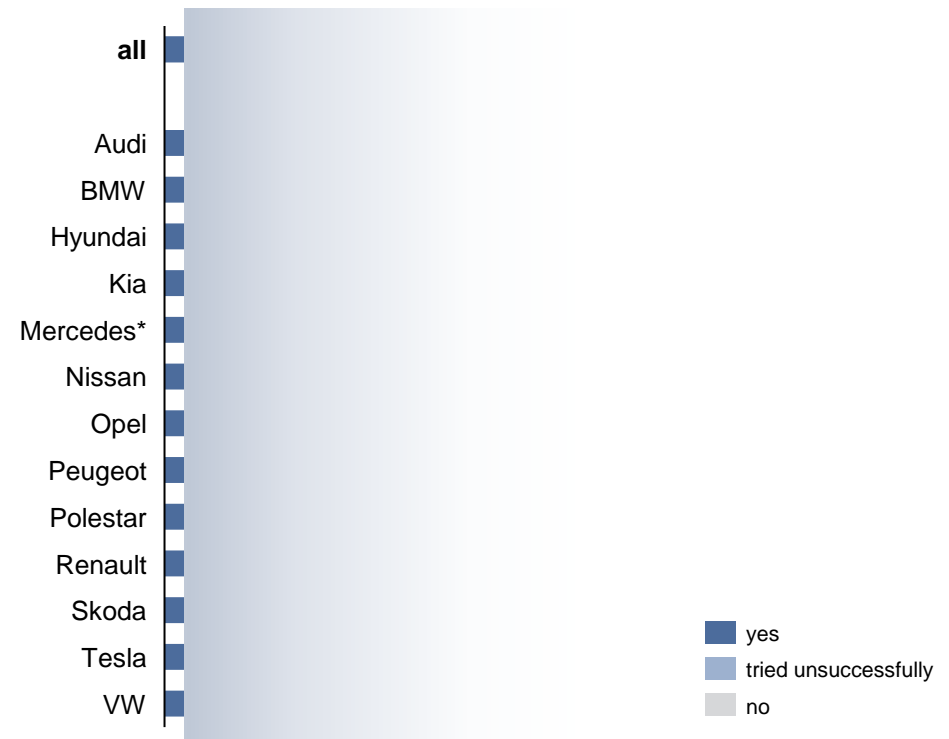
* small sample (N = 28)

Service hotline
Contact (preferred)

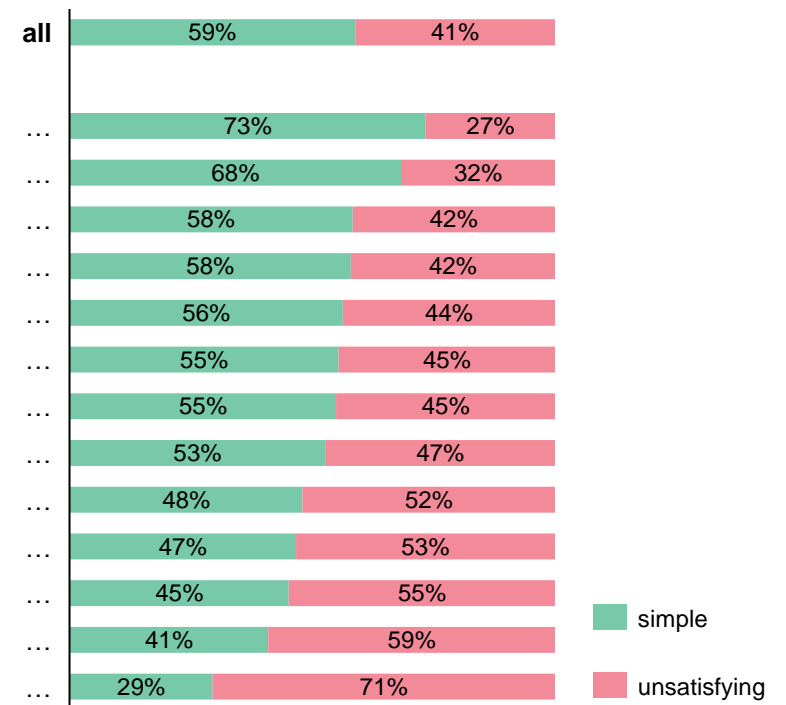*"What is or would be your preferred way of contacting [brand]'s customer service?"*

Service hotline
Contact satisfaction (by brand)

All brands with potential.

"If you summarise your experience with the customer hotline:

How did you feel about getting in touch and reaching the right, competent person?"

The performance of the brands is scattered, but less than expected, i.e. all brands have a need for action.

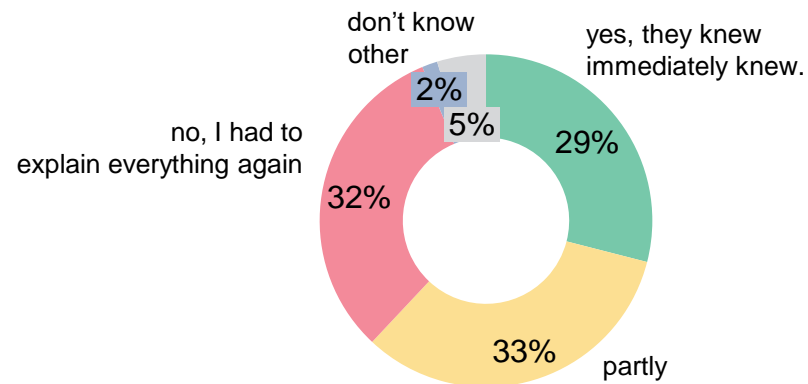|	simple	unsatisfying
all	59%	41%
…	73%	27%
…	68%	32%
…	58%	42%
…	58%	42%
…	56%	44%
…	55%	45%
…	55%	45%
…	53%	47%
…	48%	52%
…	47%	53%
…	45%	55%
…	41%	59%
…	29%	71%

* small sample (N = 28)

Service hotline
Omni-channel support

Omni-channel not convincing from the customer's point of view.

Only just under a third have the impression that the various contact options offered by a brand converge in one place.

don't know
other

no, I had to
explain everything again

yes, they knew
immediately knew.

2%

5%

29%

32%

33%

partly

Omni-channel support (by brand)

Contact channels > 1:

"You have made contact with [brand] through several "channels". Did you have the impression that your contacts at [brand] come together in one system?"
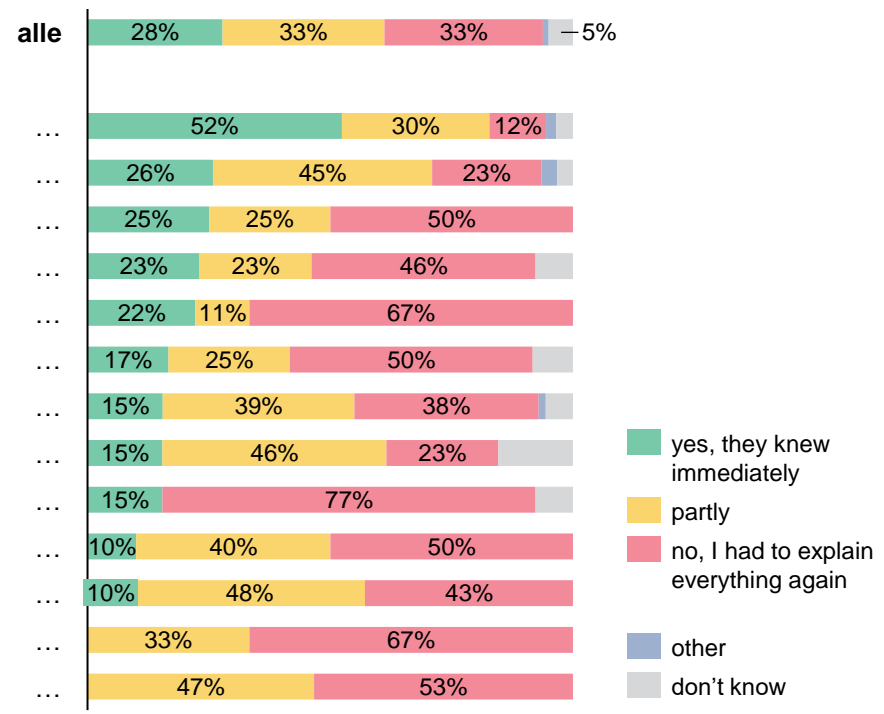
	yes, they knew immediately	partly	no, I had to explain everything again	other	don't know
alle	28%	33%	33%		5%
…	52%	30%	12%		
…	26%	45%	23%		
…	25%	25%	50%		
…	23%	23%	46%		
…	22%	11%	67%		
…	17%	25%	50%		
…	15%	39%	38%		
…	15%	46%	23%		
…	15%		77%		
…	10%	40%	50%		
…	10%	48%	43%		
…		33%	67%		
…		47%	53%		

* small sample (N = 28)

Disappointing experiences

Confirmation = no /partly:

"Were there any specific experiences that disappointed you with [brand] support?"

(N = 397)

Service hotline
Positive experiences

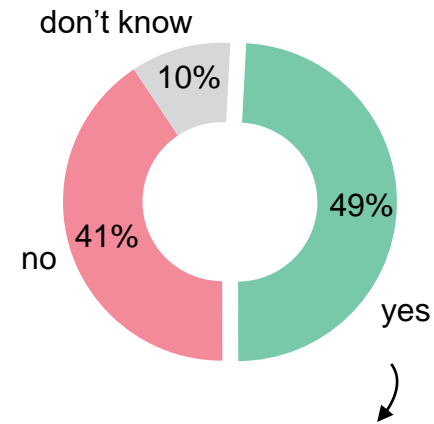# Content
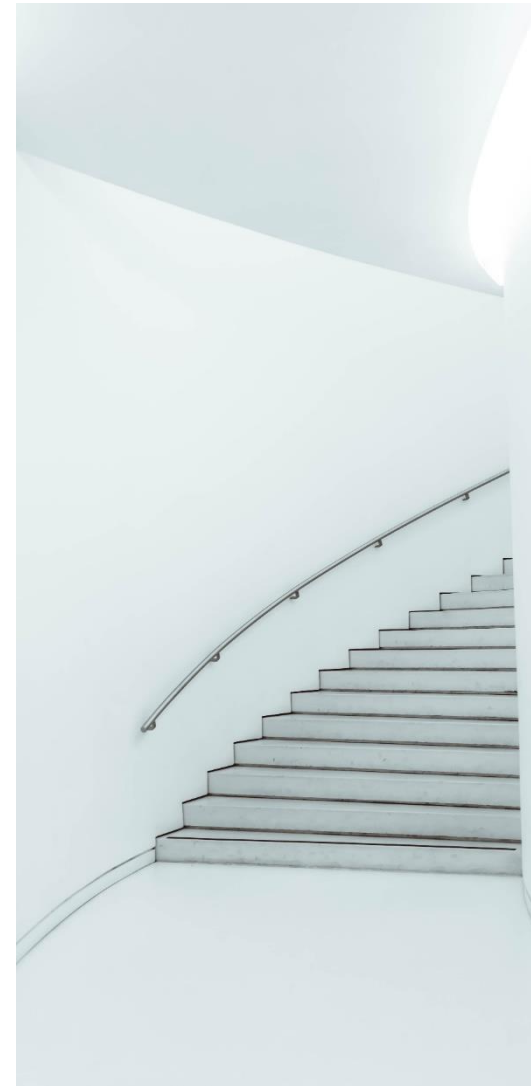
Digital services
Use of digital services

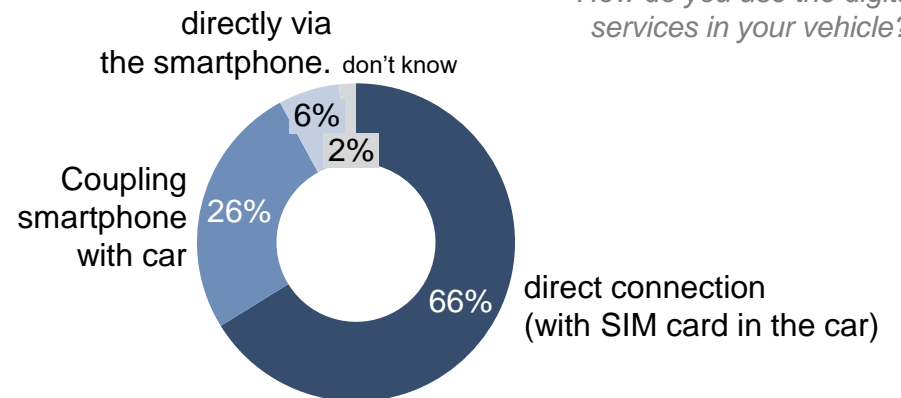*Every second person uses paid digital services.*

Only a very small proportion of digital services are used with the vehicle's own SIM card, i.e. without a smartphone.

The vast majority of digital services are used directly on the smartphone, i.e. without a connection to the vehicle.

"Do you have any paid digital services with your [brand] that are time-limited?"

don't know

10%

no 41%   49%   yes

"How do you use the digital services in your vehicle?"

directly via
the smartphone. don't know

6%

2%

Coupling
smartphone
with car 26%

66% direct connection
(with SIM card in the car)

Digital services
Use of digital services (by brand)

Big differences between the brands

Brands vary greatly in their use of the opportunities to sell digital paid services to their customers.

The high quotas of some manufacturers show the potential for the rest.

"Do you have any paid digital services with your [brand] that are time-limited?"

	yes	no	don't know
all	50%	41%	10%
…	79%	7%	14%
…	69%	29%	1%
…	66%	26%	8%
…	60%	30%	9%
…	58%	28%	14%
…	55%	26%	19%
…	51%	35%	14%
…	43%	40%	17%
…	42%	46%	13%
…	38%	38%	24%
…	32%	52%	16%
…	18%	68%	14%
…	14%	75%	11%

- yes
- no
- don't know

small sample N = 28
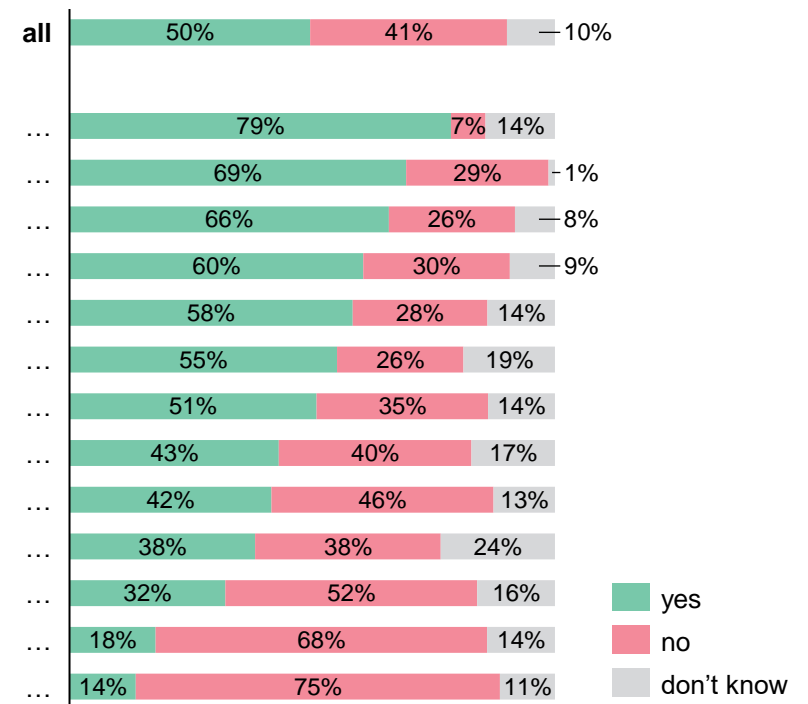
Digital services
Extension of digital services (by brand)

Paid digital services = yes:

"Do you plan to extend the services after expiry?

(multiple selection possible)

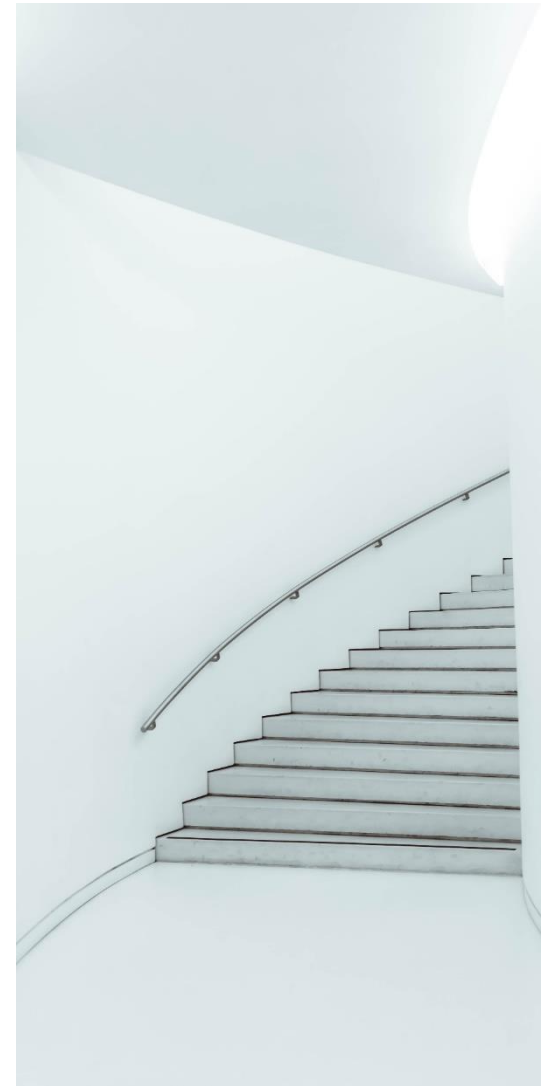|	yes or already extended	no
all	71%	29%
…	95%	5%
…	94%	6%
…	76%	24%
…	64%	36%
…	63%	37%
…	62%	38%
…	58%	42%
…	52%	48%
…	50%	50%
…	50%	50%
…	46%	54%
…	36%	64%
…	28%	72%
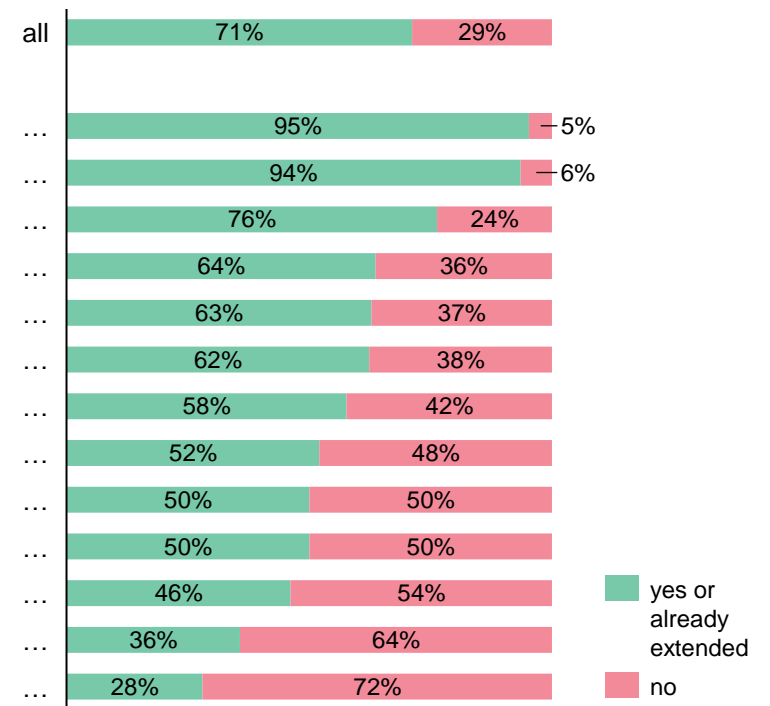
Meaningful digital services

"Regardless of the services in your [brand]:

What services do you think are generally useful?"

(N = 1054)

Content

Software updates
Experience

*High proportion with updates, OTA not yet standard.*

Unsurprisingly, 85% of respondents have already experienced software updates on their vehicle.

All the more surprising, however, is that half of the respondents had to go to the workshop for the update.

"Have software updates already been carried out on your [brand + model]?"

no 15%

yes

85%

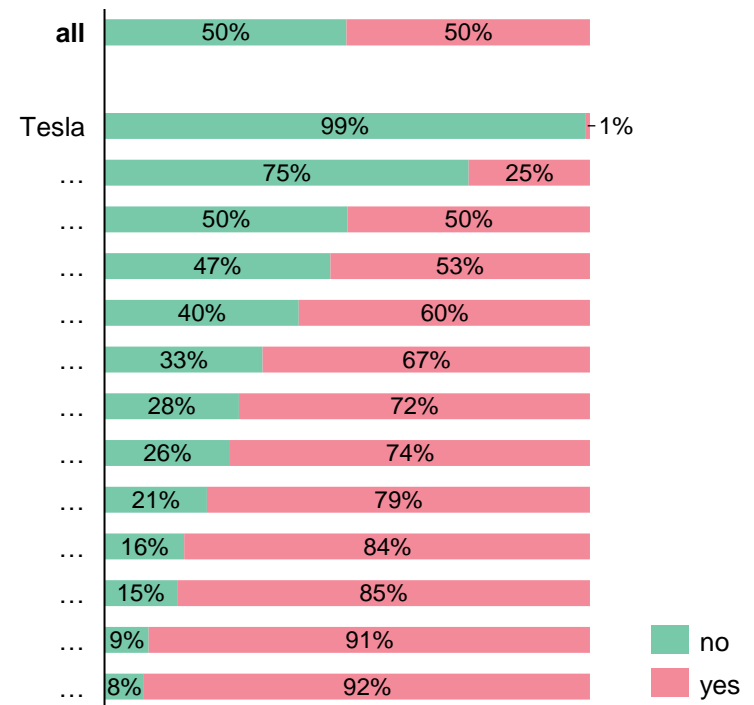*"Did you have to go to the workshop for a software update?"*

yes

no 51%   49%
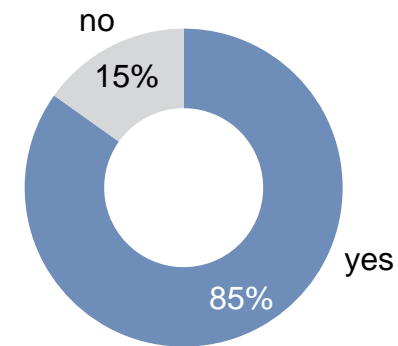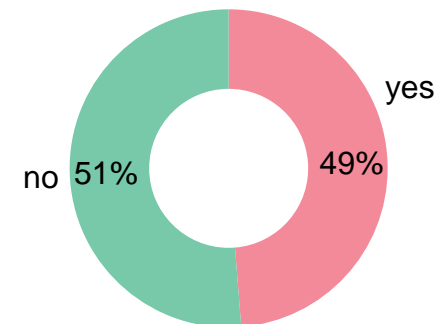
Software updates
Update in the workshop

Only a few brands with over-the-air updates.

"Did you have to go to the workshop for a software update?"

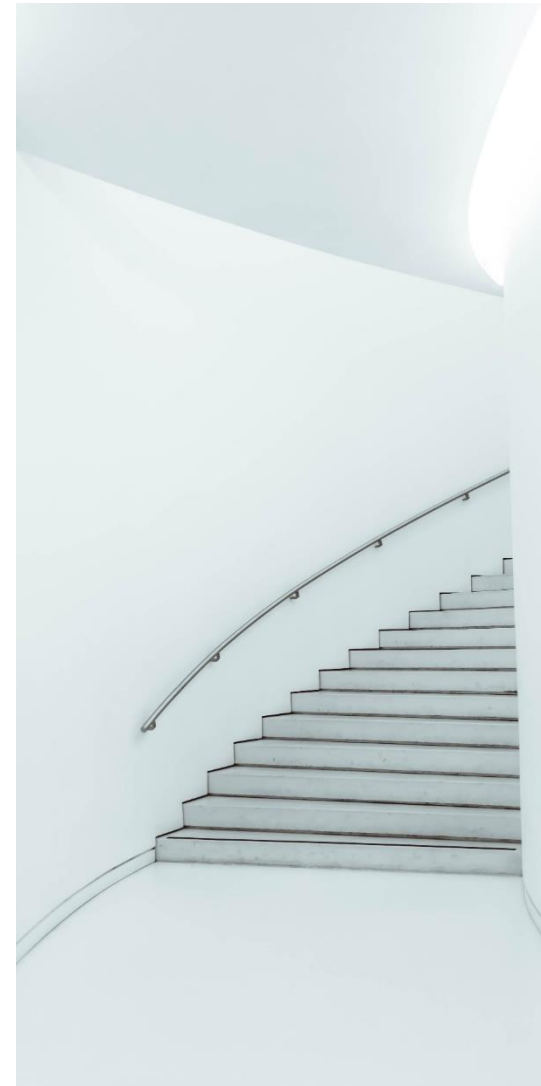|	no	yes
all	50%	50%
Tesla	99%	1%
…	75%	25%
…	50%	50%
…	47%	53%
…	40%	60%
…	33%	67%
…	28%	72%
…	26%	74%
…	21%	79%
…	16%	84%
…	15%	85%
…	9%	91%
…	8%	92%

Software updates
Recommendations

"Do you have any recommendations to [brand] on the subject of software updates?"

(N = 943)

EV After-Sales Study 2022
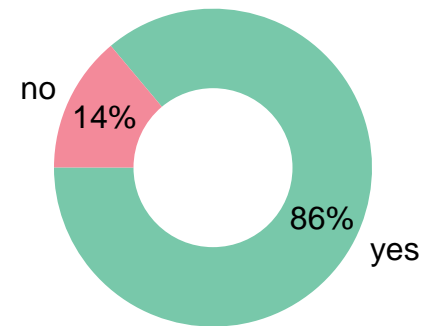# Content

Data protection
Setting regarding data transfer

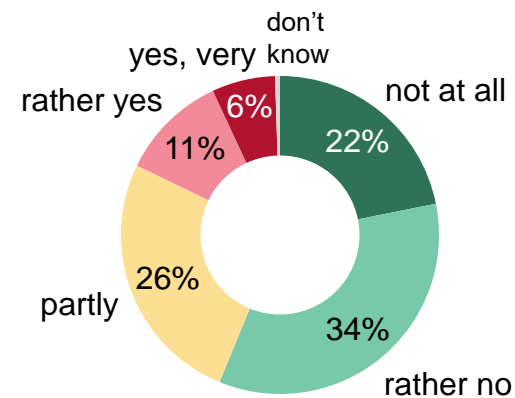*Predominant consent to share data.*

The vast majority of respondents are aware that manufacturers use data generated in the vehicle.

Only just under 20% are bothered by this (very much).

"Were you already aware that vehicles send data to the manufacturer and others?"

no 14%

86% yes

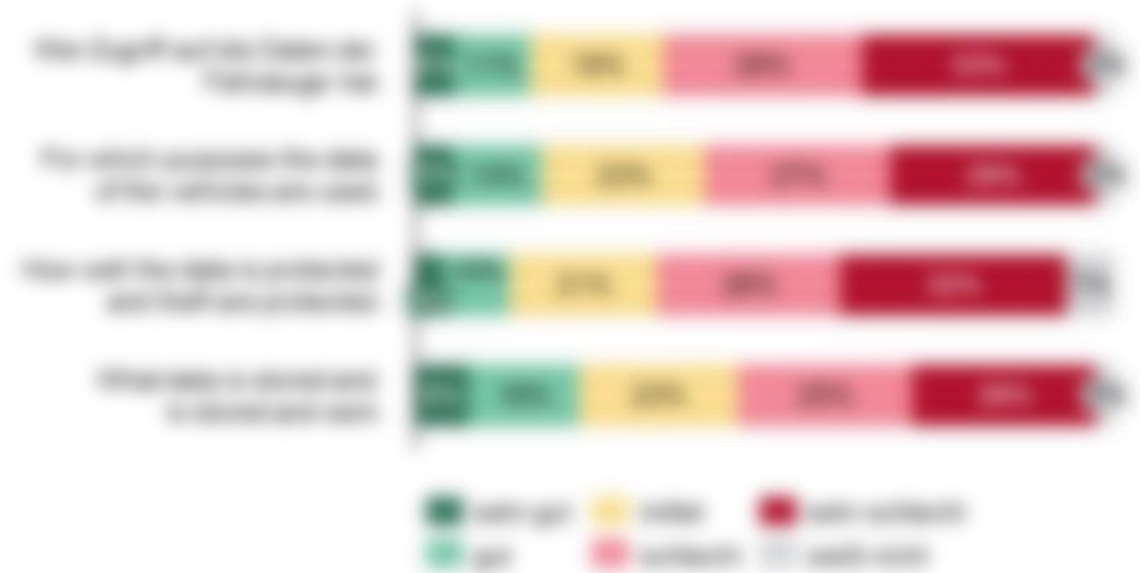*"Does it bother you that vehicle data is sent to the manufacturer or third party?"*

don't know
yes, very
rather yes
not at all
6%
22%
11%
partly
26%
34%
rather no

Data protection
Data protection concerns

"How well informed do you feel about the following aspects? "

Content
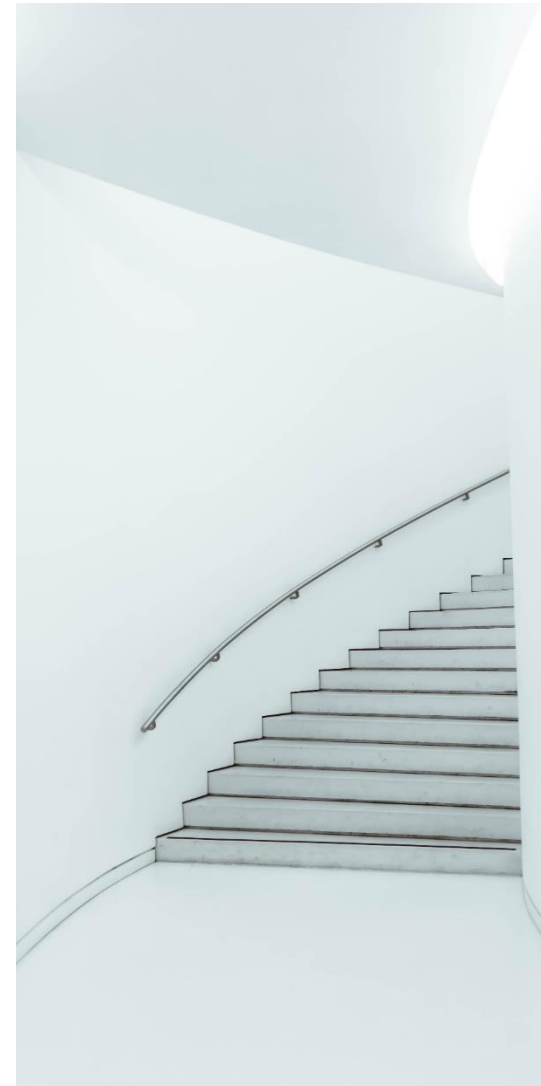
Trust in providers

"A battery test should provide you with an objective and reliable measurement result.

In this regard, what is your level of confidence in battery testing by ...? "

Occasions for battery testing

*"Regardless of the price:
Would battery testing work for you
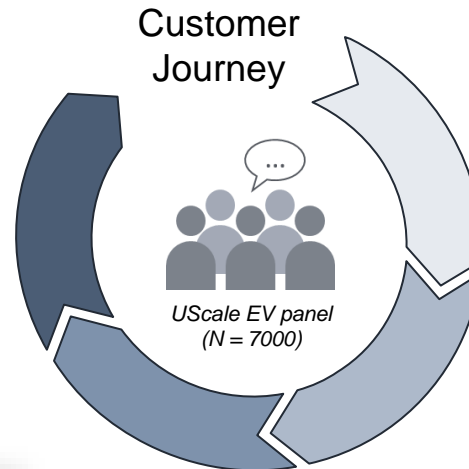in the following situations? "*

About UScale

– UScale advises manufacturers of vehicles and charging technology, energy suppliers and service providers on the customer-oriented design of offers and the development of KPI systems for customer perception.

– UScale's work is based on customer insights studies on all touchpoints of the e-mobile customer journey and a development framework for product market fit for digital and innovative products.
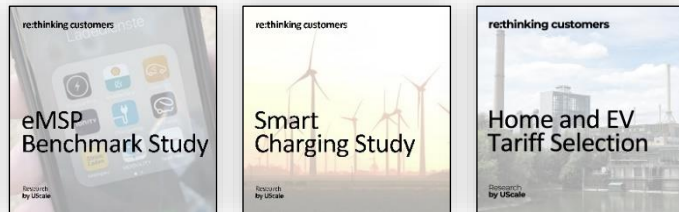

– UScale is the only provider of a panel specialised in eMobility with over 7000 panellists in the German-speaking region.

– UScale has extensive industry knowledge of the eMobility ecosystem.

– UScale understands the specific challenges of big corporates and start-ups.

– UScale makes the customer perspective tangible for managers, engineers and IT'ers.

UScale focus studies

Business models

- eMSP Benchmark Study
- Smart Charging Study
- Home and EV Tariff Selection

Customer Journey

UScale EV panel
(N = 7000)

Orientation phase

- EV Adoption Persona Study
- eMobility Marketing Study

Purchase phase

- Electric Vehicle Retail Study
- Private Charging Infrastructure Retail Study

Shop

- Private Charging Study
- Public Charging Study
- Charging Persona Study
- Public Charging Payment Method Study

Use phase vehicle

- Electric Vehicle Benchmarking Study
- Electric Vehicle After-Sales Study

* All studies in the three DACH markets

plus other countries if applicable

USCALE

SCALE YOUR USER
SCALE YOUR BUSINESS

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