

EXCERPT

eMSP Loyalty Benchmarking Study 2023 (DACH)

Data instead of opinions: eMSPs from the customer's point of view

eMSP Loyalty Benchmarking Study 2023

Initial situation



Charging services not only offer service providers a source of revenue, but also an important instrument for **customer loyalty**. The prerequisite is that EV drivers use the services actively and - more importantly - *preferably*.

According to industry experts, there are over 1,000 eMSP offerings in Germany. This leads to fierce competition in a rapidly growing market.

eMSP providers are not sufficiently aware of their own competitive position. The study shows the performance of the most important provider groups and potentials for improvement for each provider group.

eMSP Loyalty Benchmarking Study 2023

Working with the study

The study is specifically aimed at eMSPs who want to measure and improve their competitive position:

eMSP Product Owner / Business Development

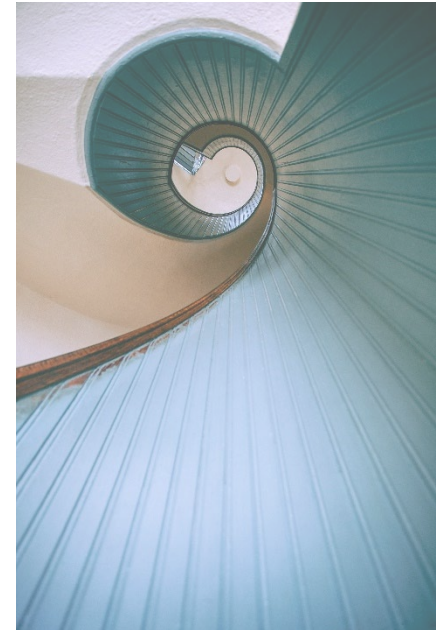
The study shows how product owners can determine the performance of their own eMSP offerings in comparison to the competition. The details show the need for action for eMSP providers. The opinions on tariff models provide input for the development of own tariff systems.

eMSP Marketing

The study results show the USPs or reasons for use and the reasons for churn for all provider groups.

eMSP App Development

The data illustrates which features attract users and which (missing) features cause users to leave. This supports the backlog and the prioritisation of own development projects.



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Added value of the study

Time

Comprehensive, quantitative and qualitative customer input saves time in developing and revising the specifications for the relevant use cases.

Costs

Customer-driven prioritisation of feature requests in the backlog directs budgets and resources to issues with the greatest value proposition.

Market share

In the current market with many new services and apps, providers can gain market share with the right offers.

Diffusion

Manufacturers who meet or exceed customer expectations for products and services support the successful ramp-up of e-mobility.



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Target group

Sample:

- Owners and drivers of electric cars (no plug-in hybrids)
- Total sample: N = 2,758

Survey:

- Sampling: online
- Countries: German-speaking countries (DACH)
- Recruitment: Social Media, Access Panels*
- Interview duration: 15 min
- Implementation: August 2023

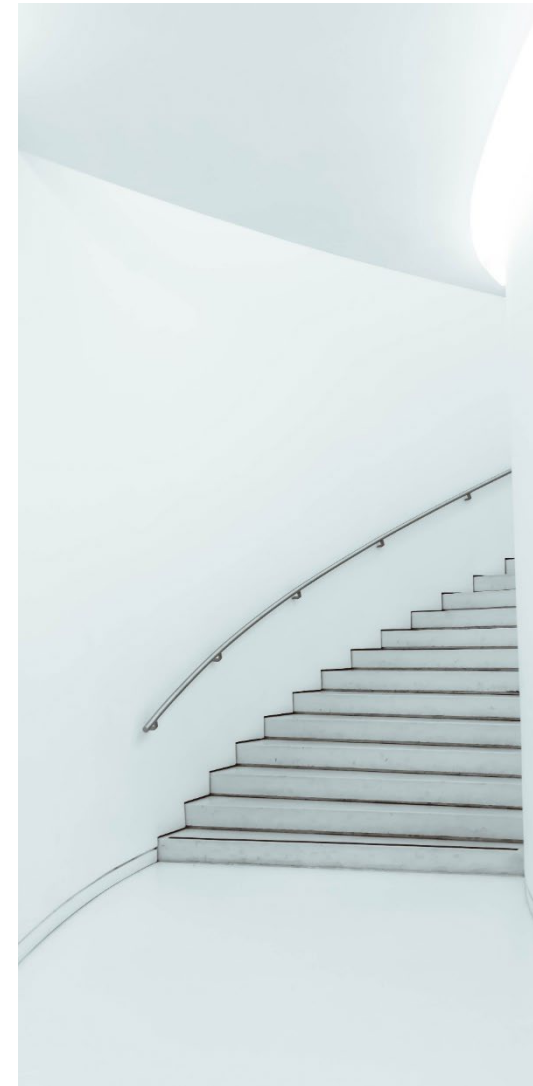
* Social media panels consist of mainly EV-savvy drivers, access panels of less EV-savvy people.



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Market shares charging services

Preliminary remark

Why are two KPIs important for "market share"?

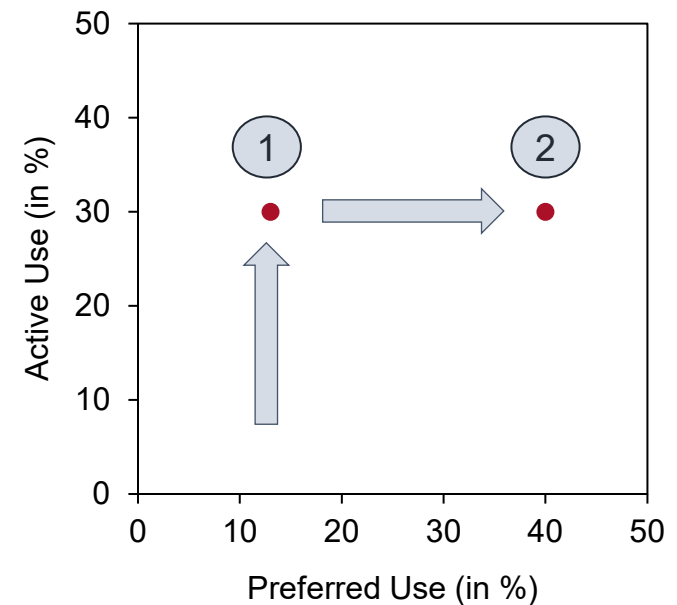
- 1 KPI: Active Use**

Beyond ad-hoc charging, EV drivers can only use services they are registered with.
- 2 KPI: Preferred Use**

Most business models are based on usage-based remuneration models.

For successful commercialisation, the actual use and the preferred use of the services is therefore crucial.

In addition to the sales potential, preferred use opportunities for cross-selling.



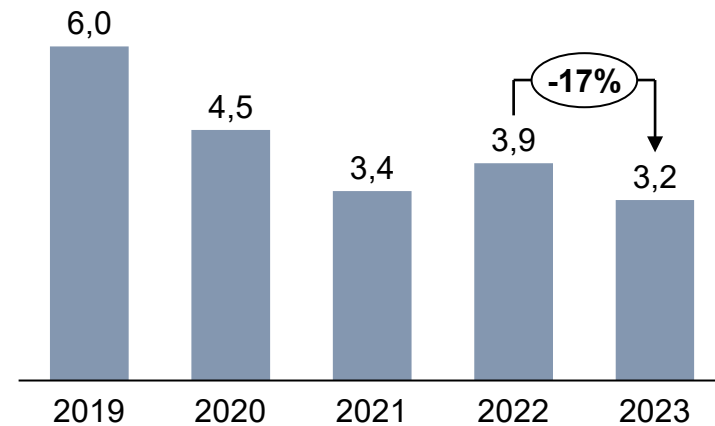
Market shares charging services

Number of charging services used

On average, EV drivers use 3.2 charging services actively.

The number of actively used eMSP services declined for several years. After an increase last year, it goes down to 3.24.

*"Which charging services or apps do you actively use?"
(multiple selection possible)*



Market shares charging services

Active use of the services

*"Which charging services or apps do you actively use?"
(multiple selection possible)*



Market shares charging services

Preferred use of services

"Which of the charging services just mentioned do you use most often?"
 (shown: share among active use mentions)

1. Welche der folgenden Anbieter sind für Sie am wichtigsten?

2. Wie oft verwenden Sie die folgenden Anbieter?

3. Wie zufrieden sind Sie mit den folgenden Anbietern?

4. Welche Anbieter sind für Sie am wichtigsten?



Market shares charging services

Use of eMSP charging services

Active Use und Preferred Use zur Bewertung der Marktstärke eines eMSP

Eine die Gegenüberstellung von Active Use und Preferred Use zeigt die spezifischen Stärken und Schwächen der Anbieter

mobility wird von sehr vielen Befragten aktiv genutzt, hat aber noch Potential bei der Präferenz

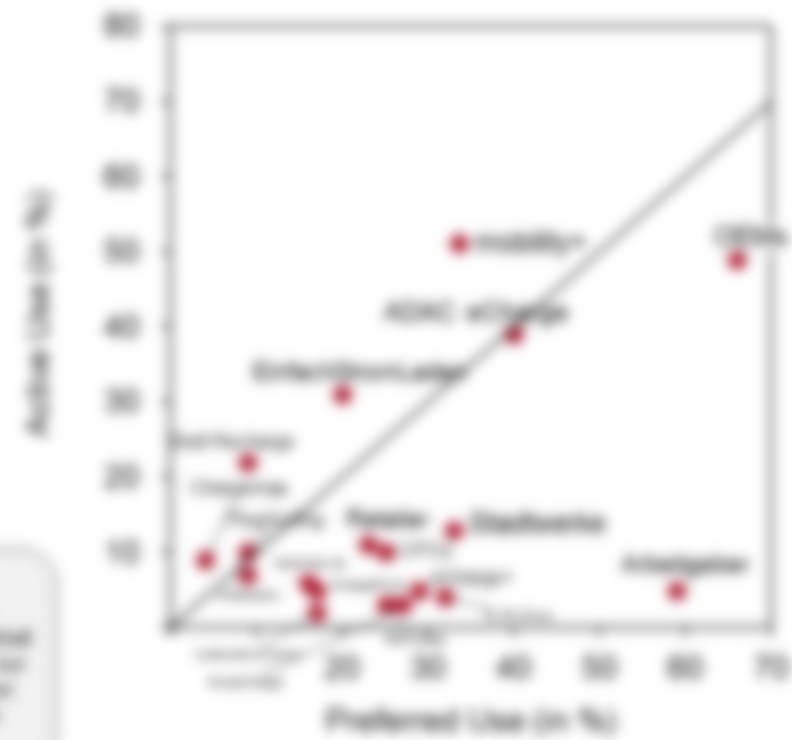
USt Angebote werden sehr häufig präferiert genutzt, haben aber noch Potential bei der aktiven, d.h. grundsätzlichen Nutzung

Legend
 Active Use (in %)
 Preferred Use (in %)

"Which charging services or apps do you actively use?"

vs.

"...most often?"



Market shares charging services

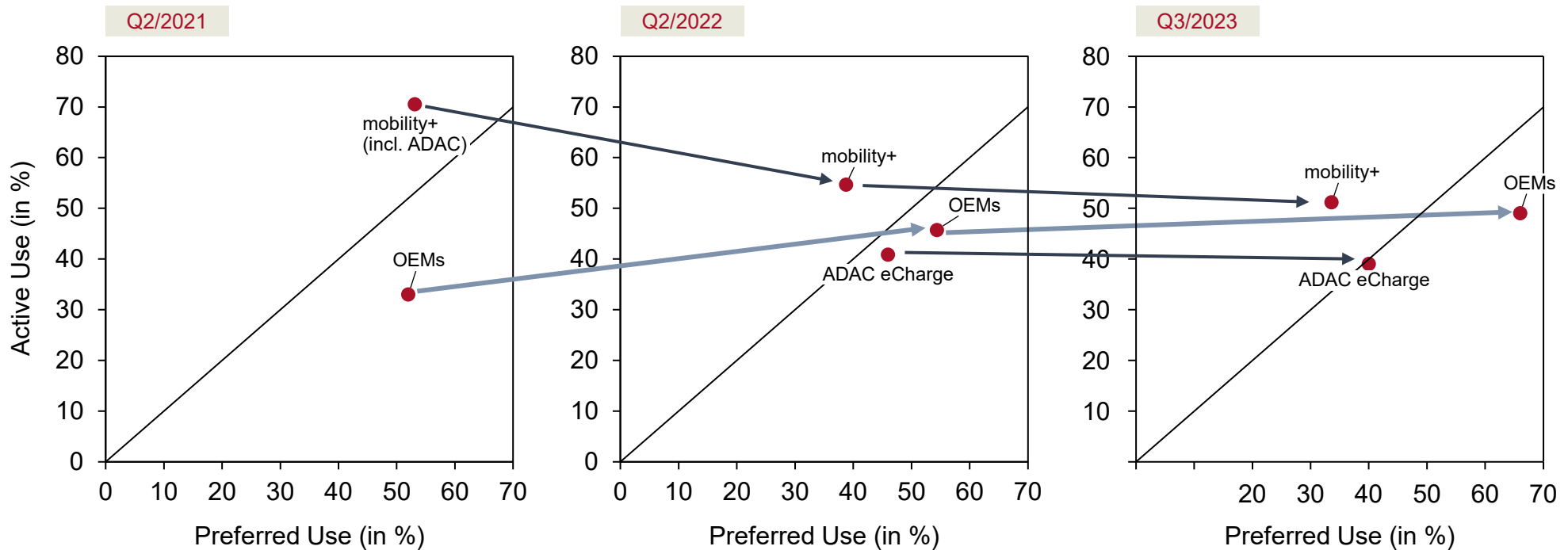
Use of eMSP charging services (selected services)

*OEM services are increasing in both Active Use and Preferred Use.
mobility+ / eCharge largely maintains its position.*

"Which charging services or apps do you actively use?"

vs.

"...most often?"



Market shares charging services

Market shares eMSP clusters

Unterschiedliche Strategien der Anbietergruppen

Die Verteilung der Anbietergruppen zeigt die Unterschiede in den Marktstrategien

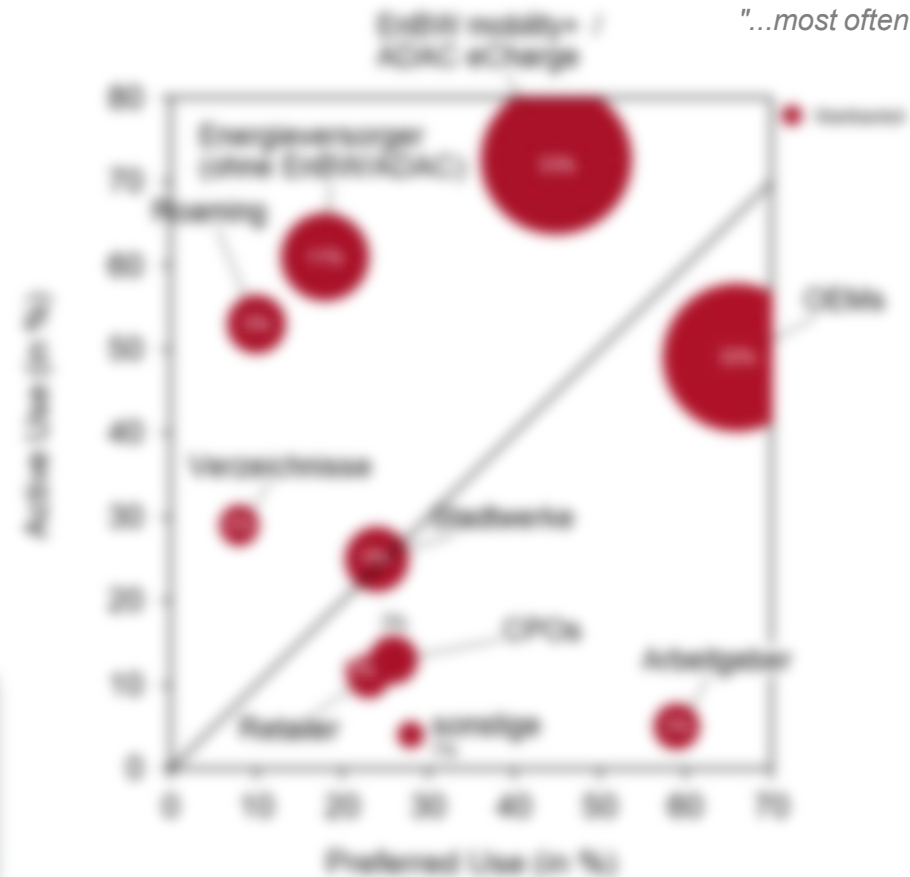
Es kommen Energieversorger (ohne mobility) und Flottenanbieter (mit begrenzter Reichweite) auf 10% Marktanteil, indem sie bei der Mehrheit der Befragten unter den aktiv Genutzten sind

Legend
 10% Marktanteil
 20% Marktanteil
 30% Marktanteil
 40% Marktanteil
 50% Marktanteil
 60% Marktanteil
 70% Marktanteil
 80% Marktanteil
 90% Marktanteil
 100% Marktanteil

"Which charging services or apps do you actively use?"

vs.

"...most often?"



Market shares charging services

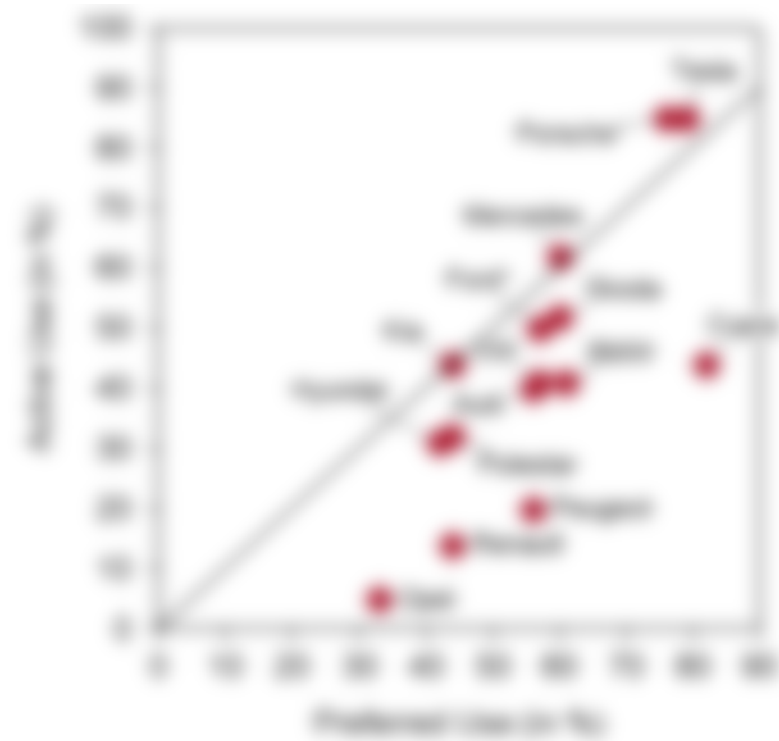
OEM services in comparison

Wide dispersion between the brands.

"Which charging services or apps do you actively use?"

vs.

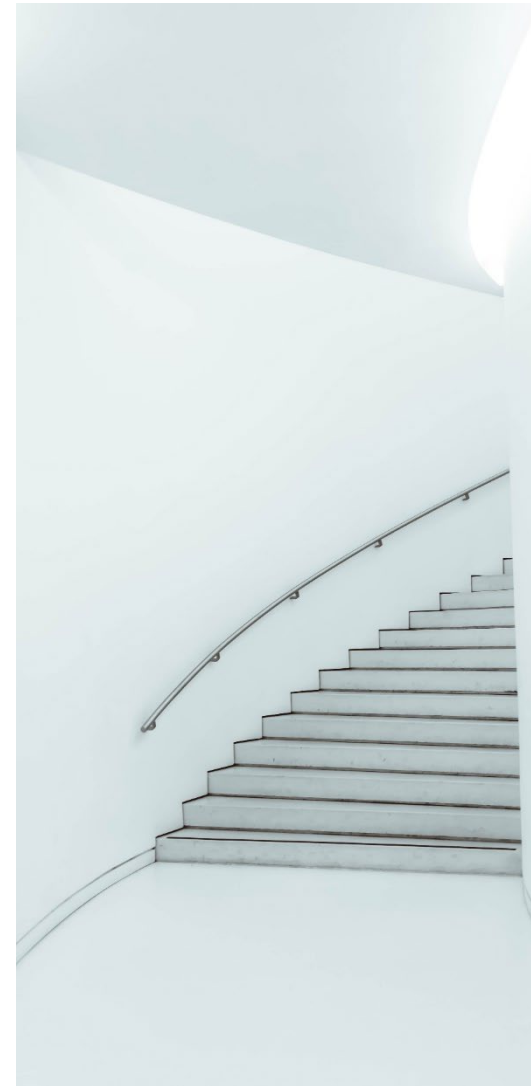
"...most often?"



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Drivers for preference

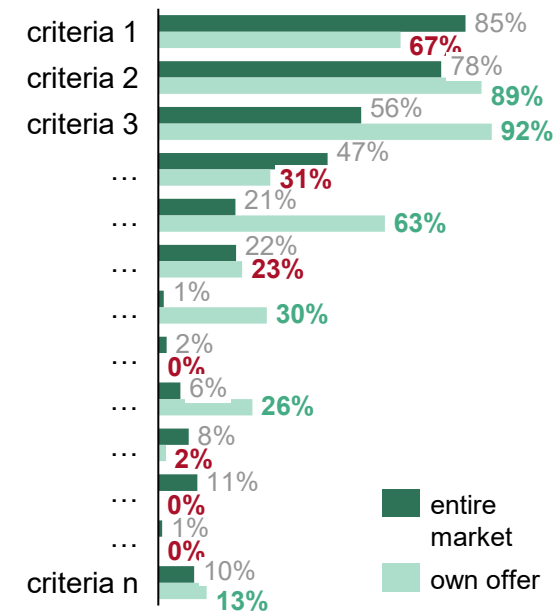
Preliminary remark

Why are drivers for preference important for eMSPs?

The drivers for preference show with which proposition individual providers or provider groups score.

Questions for eMSP:

- In general, what criteria is important to EV drivers when choosing their preferred eMSP?
- How does an offer or provider group perform in relation to the competition?
- Where are competitors better?
- Where is your own service ahead?
- Does your own profile fit the defined strategy?
- Where does your own service need to improve?



Drivers for preference

Usage reasons for #1

*"What are the main reasons you use your "number 1" most often?"
(multiple selection possible)*

Interpretation: Berücksichtigung von Technik und
nutzspezifischen Eigenschaften des #1

Nur der Vorteil des #1 ist ausschlaggebend für
den Einsatz des #1

Nur der Vorteil des #1 ist ausschlaggebend für
den Einsatz des #1



Drivers for preference

Most important reason for preference

"And what is for you the most important reason for your 'number 1'?"

Strategie, Technologie, Service und Personalisierung
 20% 10% 10% 10%

Preiswert und die besten Kunden-Service
 Nachhaltigkeit und die Verantwortung von der
 Innovationen und die Produkte
 Nachhaltigkeit

Der "Number 1" Brand ist ein wichtiger
 Faktor für die Kunden-Service und die
 Nachhaltigkeit von der Innovationen und die
 Produkte



Drivers for preference

Performance of the municipal utilities

Municipality utilities' offer with great need for action, especially in the hygiene factors.

*"What are the main reasons you use your "number 1" most often?"
(multiple selection possible)*

The municipal utilities are clearly behind the average of all providers in almost all areas.

The USP of the municipal utilities is their low AC tariffs (DC tariffs are below average) and their regionality, which is appreciated by many users.



Drivers for preference

Performance of roaming services

Roaming services with massive need for action in (almost) all areas.

*"What are the main reasons you use your "number 1" most often?"
(multiple selection possible)*

Die Roaming-Leistungen fallen in fast allen Bereichen zum Teil deutlich hinter den Durchschnitt zurück.

Besondere Mängel sind die Schwächen der Roaming-Leistungen bei der Hyperlokalisierung, Netzabdeckung, Verfügbarkeit und Kostenthemen.

Einerseits Hintergrund, der häufiger genannt wird, wie im Durchschnitt alle Anbieter, ist die Empfehlung des Abnehmers.



Drivers for preference

Performance of CPOs

CPOs' biggest performance drivers

- The biggest driver for CPOs' biggest performance is the ability to provide a high level of service to their clients.
- The second biggest driver is the ability to provide a high level of service to their clients.
- The third biggest driver is the ability to provide a high level of service to their clients.
- The fourth biggest driver is the ability to provide a high level of service to their clients.
- The fifth biggest driver is the ability to provide a high level of service to their clients.

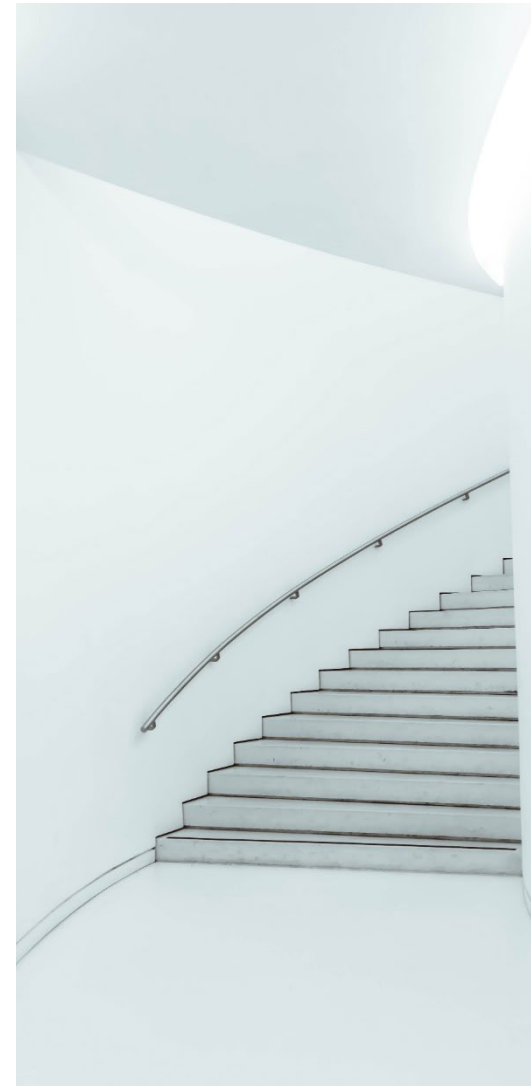
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Barriers to preference

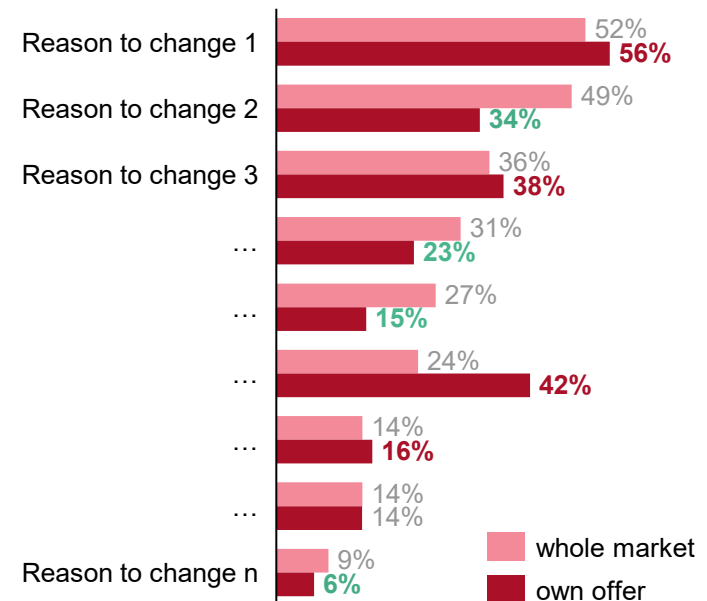
Preliminary remark

Why are barriers to preference important?

The barriers to preference show for which service offers individual providers or provider groups lose users.

Questions for eMSP:

- In general: What are the reasons that drive EV drivers to the competitors?
- How does one's own offer or provider group perform in relation to the competition?
- Where does your own service lose users?
- Where is your own service ahead?
- Where does your own service need to improve?



Barriers to preference

Reasons for #2...n

Interviews with participants, Longitudinal and Focus group
 Discussions, to assess barriers to adoption

Key barriers to adoption
 identified in the focus group
 and interviews

Barriers to adoption
 identified in the focus group
 and interviews

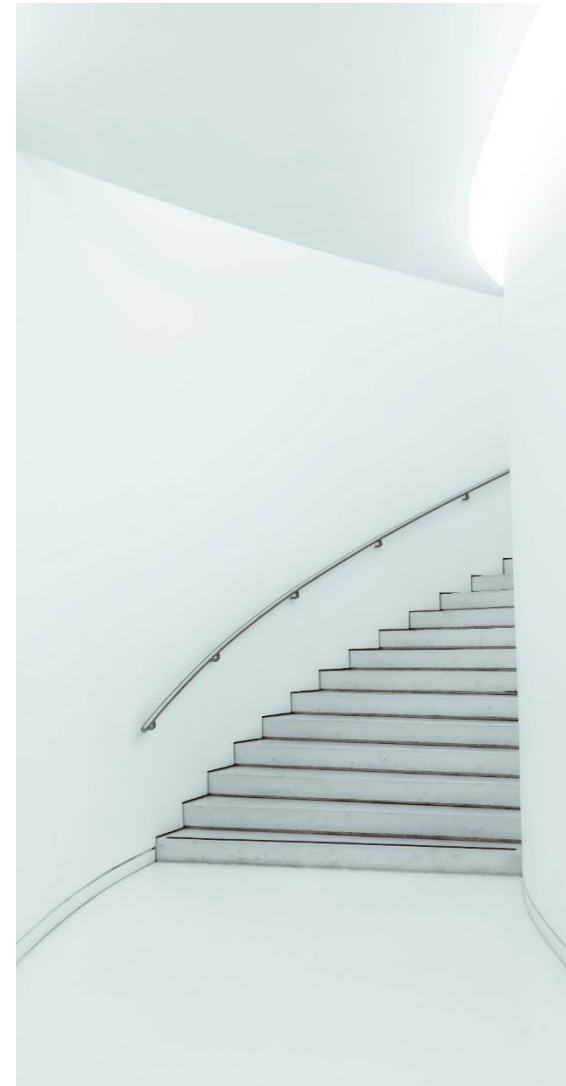
"What about the other charging services
 or apps you use?
 On what occasion do you use them?"
 (multiple selection possible)



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Churn from preferred eMSP

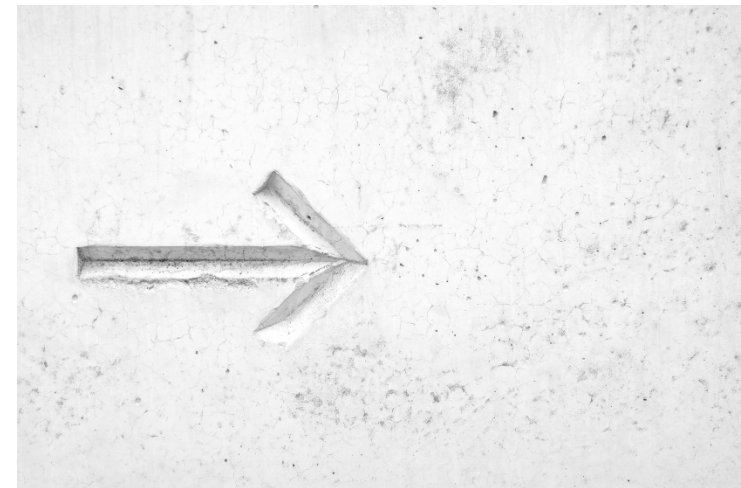
Preliminary remark

What are the reasons for churn?

eMSP services are easy to use with a few clicks, i.e. hurdles are low. This is contrasted by the habit of the known.

Questions for eMSP:

- Which factors have an influence on the willingness to switch?
- What factors were ultimately decisive for a change in 2022 / 2023?



Churn from preferred eMSP

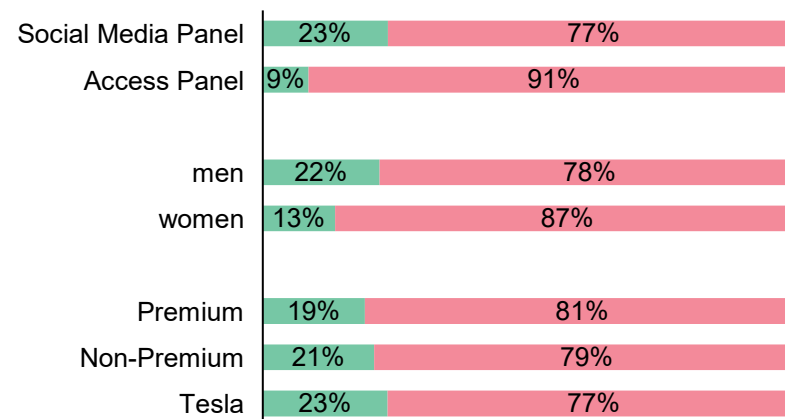
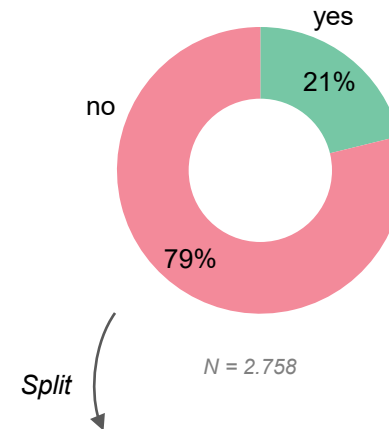
Change frequency of #1

One in five have changed their #1 in the last year.

Only one fifth of the respondents has changed their preferred charging service in the last year. In the 2022 study year, 19% have changed their preferred provider.

Among EV-savvy respondents, the switching incidence is higher than among the less EV-savvy respondents of the access panel.

"Have you changed your #1 in the last 12 months?"



Churn from preferred eMSP

Possible reasons for change in the future

Many criteria relevant to loyalty.

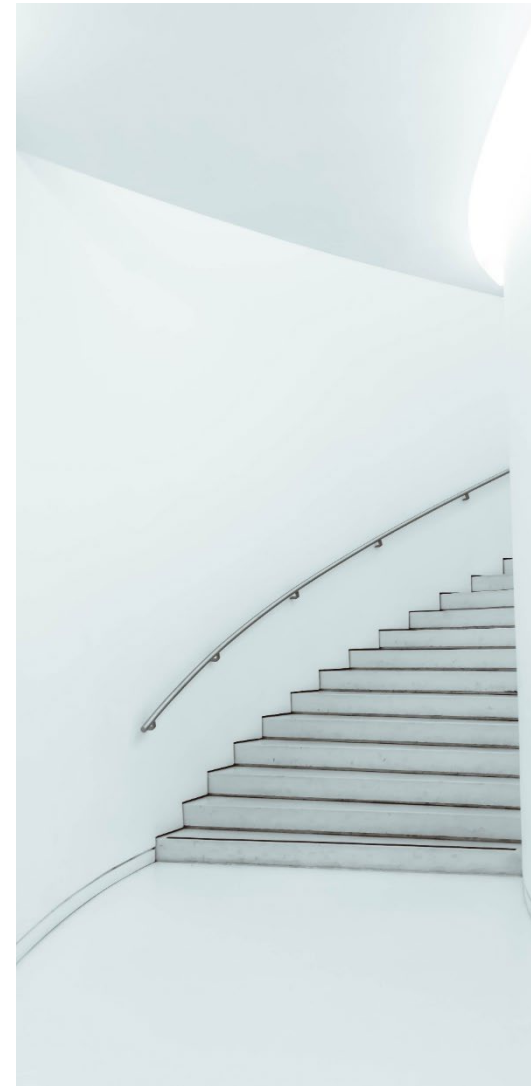
Churn from preferred eMSP = no:
 "When would you give up your #1 and switch to another provider?
 Switching comes into question when another provider offers..."
 (multiple selection possible)



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Charging app features

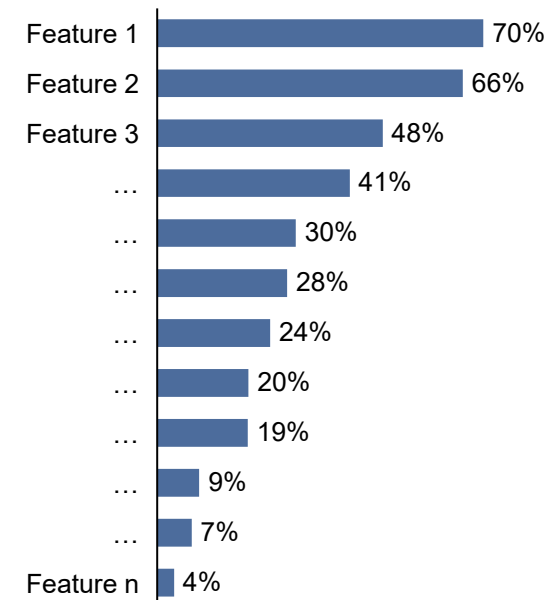
Preliminary remark

Which features are important?

eMSP services offer many important functions. Customer loyalty is achieved when an offer performs better than the competition in the functions relevant to the target group.

Questions for eMSP:

- In general: What features are important to EV drivers?
- Which relevant functions are particularly frequently used or appreciated in an eMSP's offer?
- What features does the target group miss in an eMSP's offer?
- Which competitors' features are more convincing?



Charging app features

Charging apps: Features used

"Generally:
What functions are particularly
important to you in a charging app?"
(multiple selection possible)

Informationen zum neuen USSCALE-Feature
Informationen zum Standard-Modul-portfolio

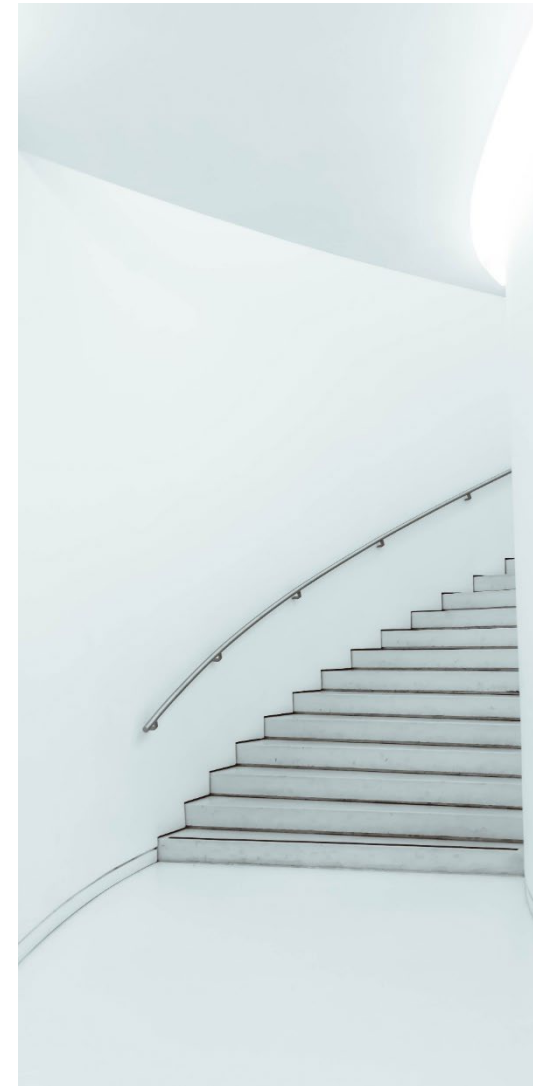
Bitte um Bewertung der Funktionen nach
Ihrer Wichtigkeit für Sie. Bitte wählen Sie
eine Bewertung von 1 bis 5. (1 = nicht
wichtig, 5 = sehr wichtig)



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CPO preferences

Preliminary remark

Are CPOs relevant for the charging decision?

A charging station supplies electricity independently of the operator. As supply increases, so do the differences and the choices available to users.

Questions for eMSP:

- How important is the CPO from the users' point of view? Which factors are decisive?
- What are the differences between the providers?



CPO preferences

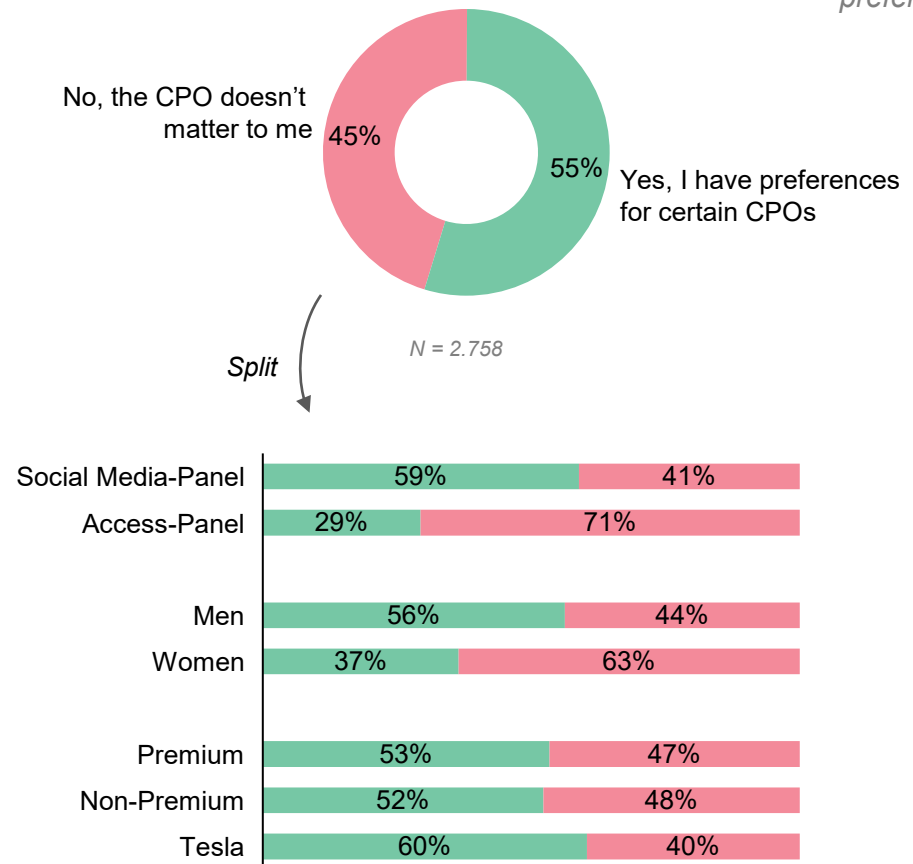
Relevance of CPOs

Over half with preference for specific CPOs.

Even though only a few respondents pay for charging ad-hoc directly at the charge point, more than half of the respondents prefer certain charging station operators.

There are big differences depending on the target group. Especially the EV-savvy target group from the social media panel and Tesla drivers have strong preferences for a CPO.

*"At charging locations and hubs with several charging pole operators:
Do you have any preferences?"*



CPO preferences

Relevance of CPOs

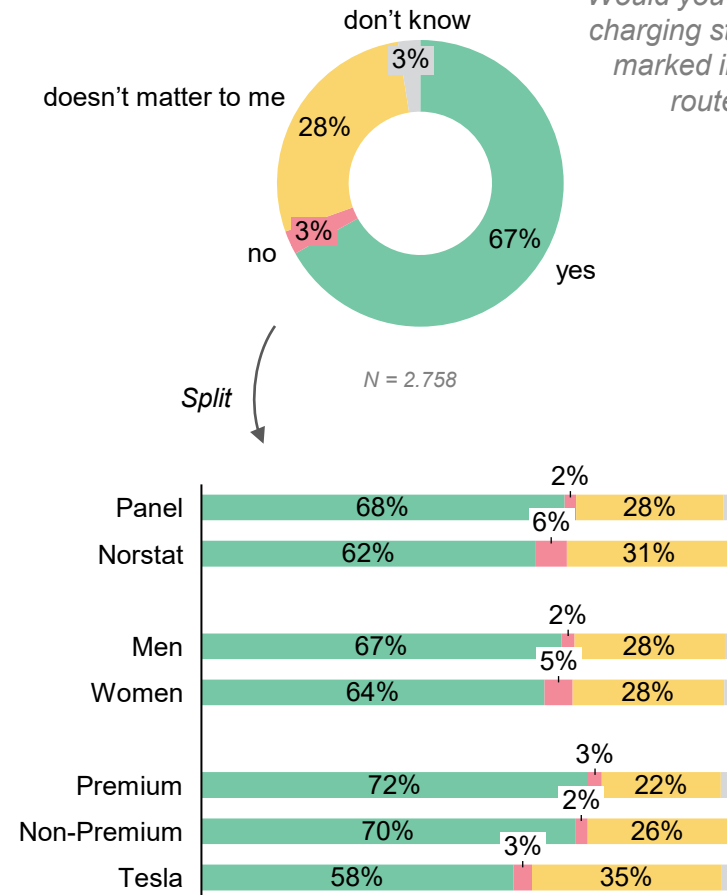
Two thirds request CPO information in the charging app.

Regardless of whether respondents have a preference for specific CPOs, two-thirds of respondents want operators to be clearly displayed in charging apps.

Tesla drivers in particular are less often interested in seeing the CPO in a charging app. A possible reason is that they can easily find Tesla charging parks in their vehicle's navigation system.

"Today, charging station operators are only displayed in a hidden way in charging apps.

Would you like the operator of charging stations to be clearly marked in the charging app, route planner or vehicle navigator?"

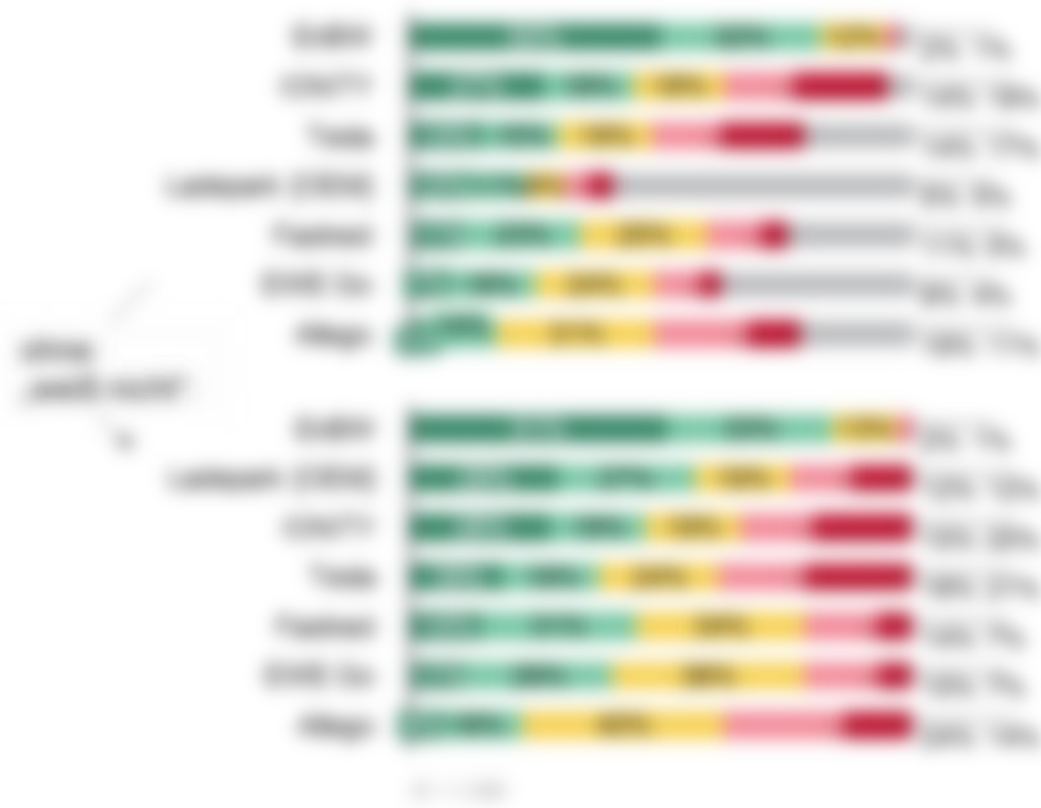


CPO preferences

Preferences in charging parks

Big differences between Tesla drivers and the other brands.

"How attractive do you find the following charging parks?"



CPO preferences

Criteria for CPO selection

How do you select the CPO?

What are the most important criteria for CPO selection?

What are the most important criteria for CPO selection?

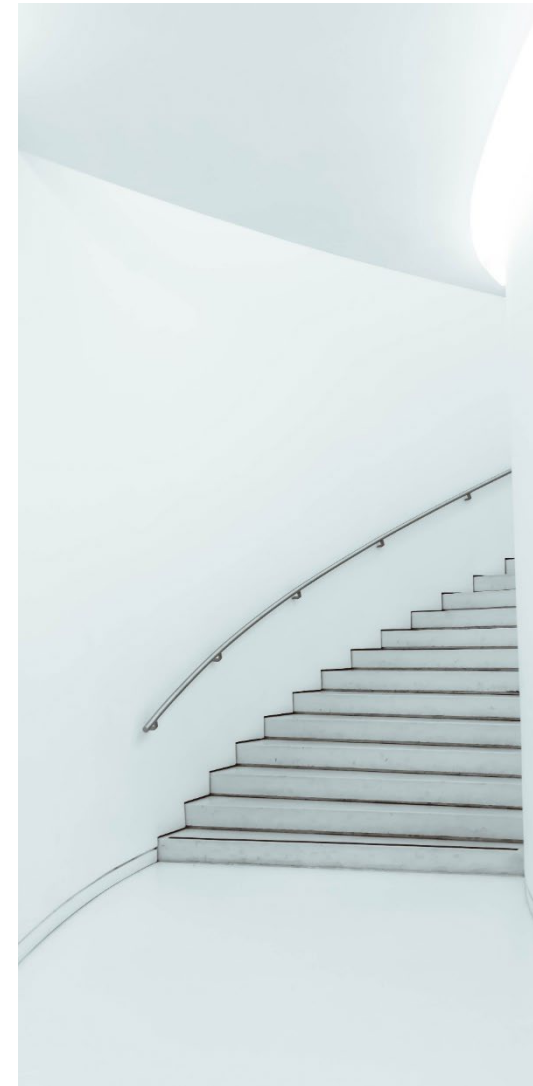
Preferences = yes:
 "If there are several operators on site:
 What criteria do you use to decide which
 operator to charge with?"
 (Multiple answers possible)



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Preliminary remark

Why are payment methods important for user retention?

In addition to the tariff structure, coverage and functionality of individual eMSP services, EV drivers have specific preferences for payment methods. The choice of the preferred eMSP service is therefore also influenced by the payment methods associated with the service.

Questions for eMSP:

- Which payment methods are preferred by which target group?
- Do payment methods and modalities need to be optimised to increase customer loyalty?



Authorisation and payment

Authorisation and payment (actual)

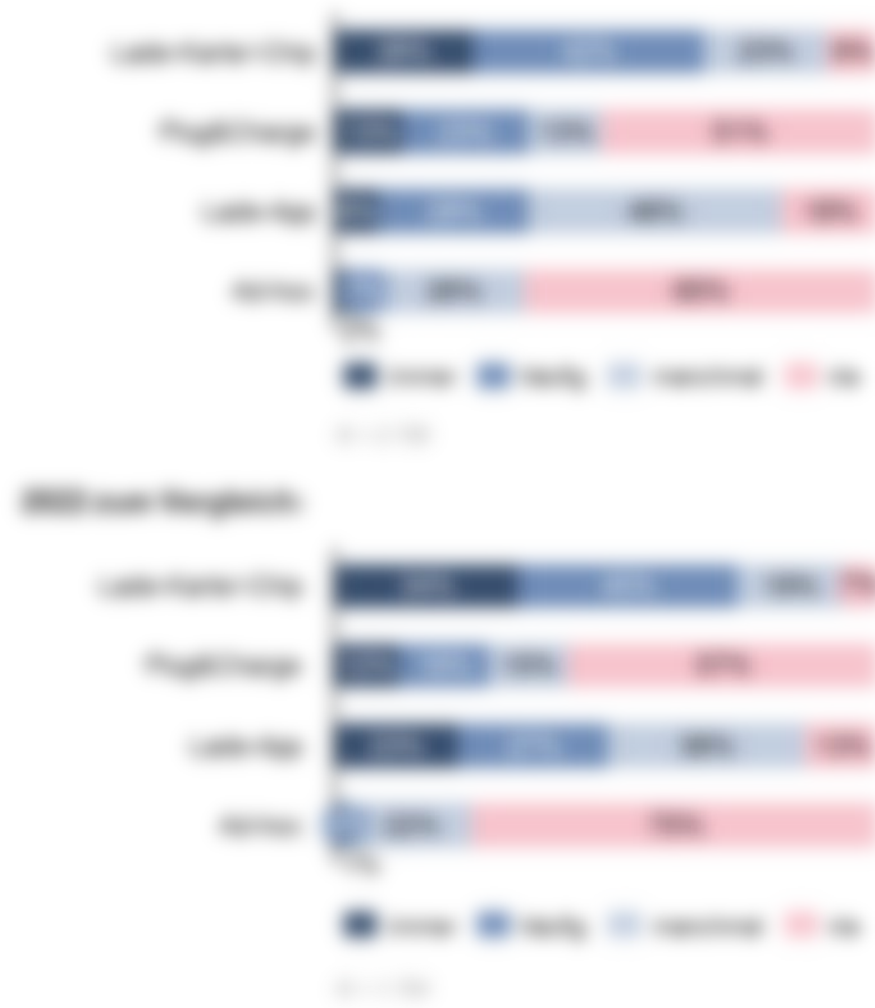
"Which payment method do you use most often today?"

Quelle: Statista, basierend auf den Daten der Umfrage "Zahlungsmethoden in Deutschland 2023".

Die Grafik zeigt die Nutzung von Zahlungsmethoden in Deutschland, unterteilt in Online- und Offline-Kauf.

Die Daten sind in Prozentpunkten angegeben und zeigen die relative Wichtigkeit der verschiedenen Zahlungsmethoden.

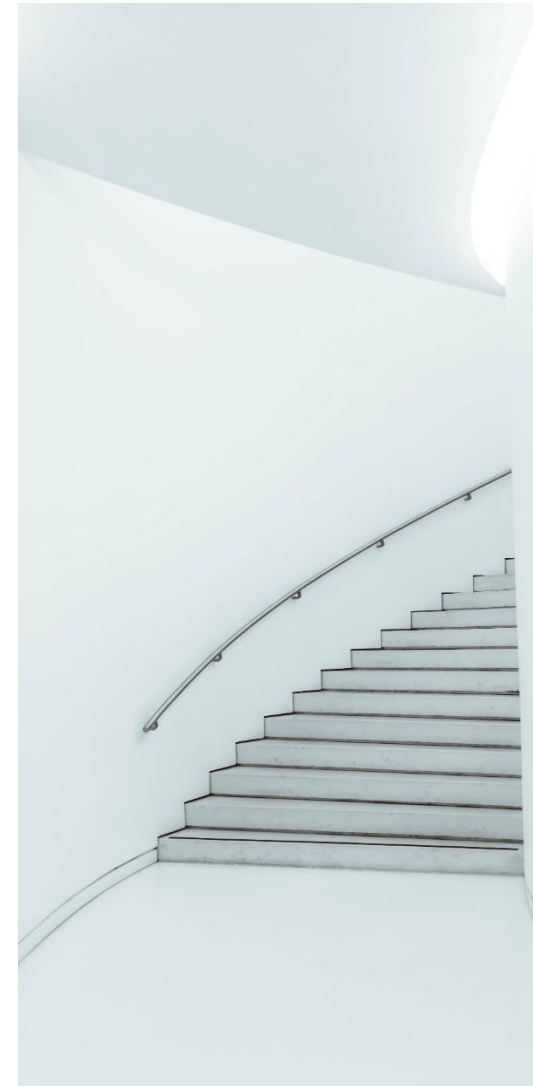
Die Grafik ist in zwei Hauptbereiche unterteilt: Online-Kauf und Offline-Kauf.



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Authorisation and payment

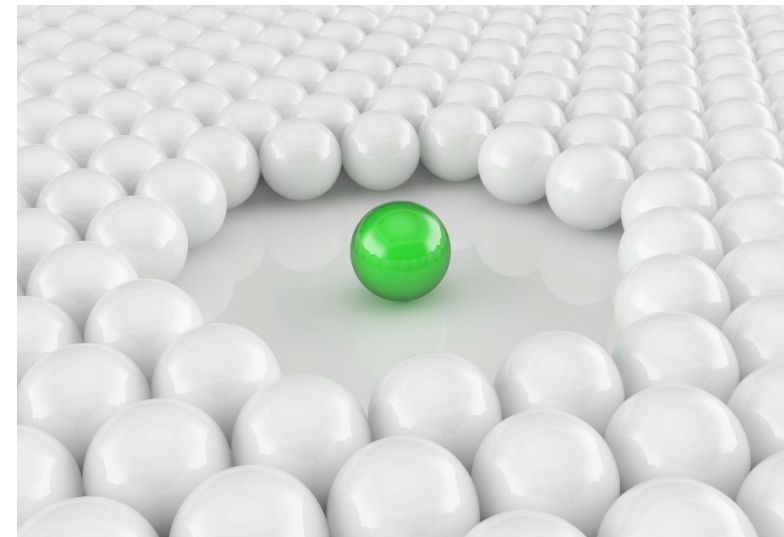
Preliminary remark

Which payment methods will prevail in the long term?

The current preferences for payment at the charging station are overlaid by the current offer and the current technical possibilities. In order to assess which method will prevail in the medium term, it is important to know what advantages and disadvantages EV drivers see in the options.

Questions for eMSP:

- Why do respondents use a payment method?
- How will preferences change if, for example, Plug&Charge is offered across the board or the availability of the mobile phone network in Germany will improve?



Preliminary remark on the calculation of net value added

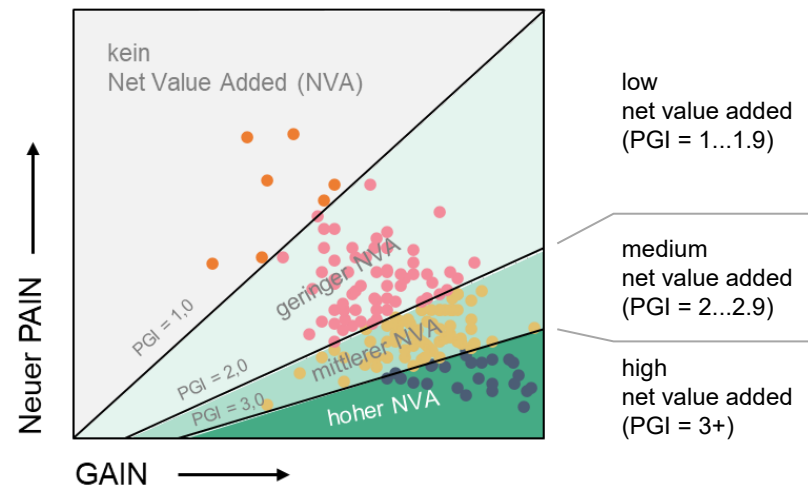
Determination of the net value added for payment methods with the Pain-Gain test approach*

Each payment method offers its own advantages, but also its own disadvantages for users.

The decisive factor for acceptance and thus use is the ratio of the respective advantages to the disadvantages, i.e. the net value added of each payment method.

Step 1:
Evaluate advantages (gains) and new disadvantages (pains)

Step 2:
Determine net value added

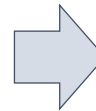
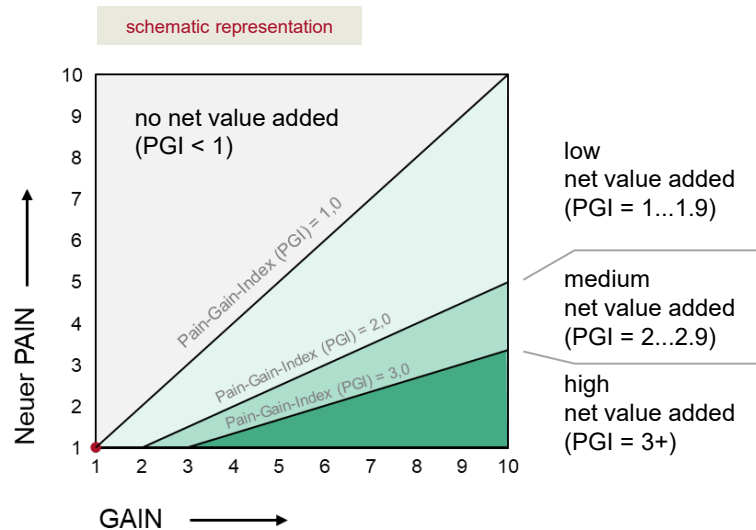


* PGI = Pain-Gain-Index = Gain value / pain value

Assessment of payment methods

Summary: Net value added

Contrary to what the preferred payment options (see above) suggest, there is a significant proportion of respondents for all payment methods who see high net added value in this particular payment option.



Assessment of payment methods

Summary: Biggest driver

Plug&Charge



Charging card / chip



Charging app



Ad-hoc (smartphone)



Ad-hoc (giro / CC)



Assessment of payment methods

Summary: Biggest barrier

Plug&Charge



Charging card / chip



Charging app



Ad-hoc (smartphone)

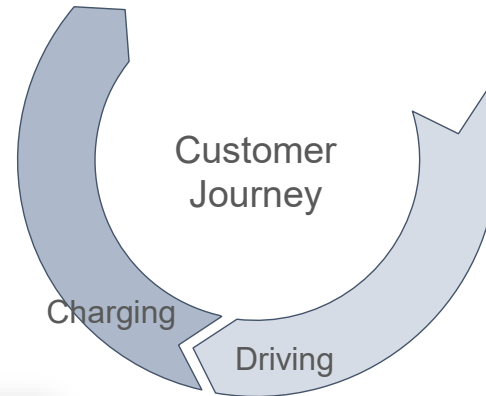


Ad-hoc (giro / CC)

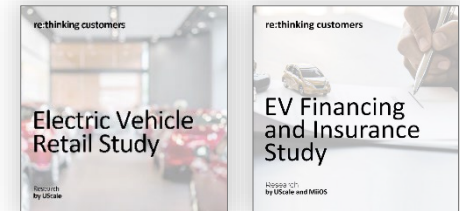


UScale focus studies

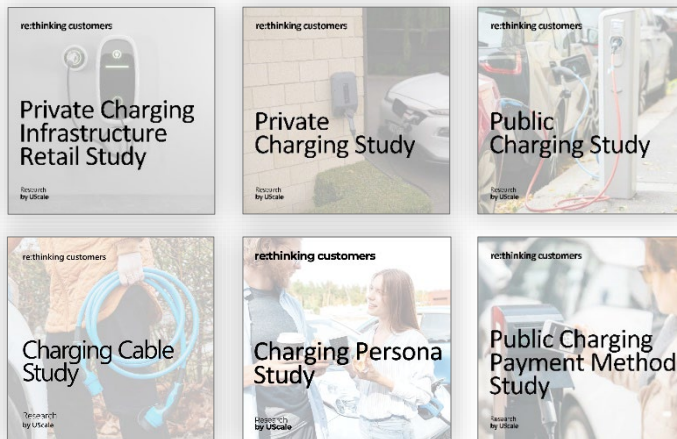
Business models



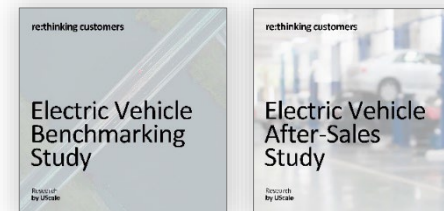
EV purchase



Charging



EV usage



About UScale

- UScale advises car manufacturers, 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 a development framework for the product-market fit for digital and innovative products and customer insights studies on all touchpoints of the e-mobile customer journey.



- UScale is the only provider of a panel specialised in eMobility with over 9,000 panelists in German-speaking countries.
- UScale makes the customer perspective tangible for managers, engineers and IT specialists.
- UScale has extensive industry knowledge of the eMobility ecosystem.
- UScale combines extensive experience with the challenges of corporates with the agility of a start-up.



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SCALE YOUR BUSINESS



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