Charging Services Study 2024

Charging services from the perspective of EV drivers

Handout for the press release
22.10.24

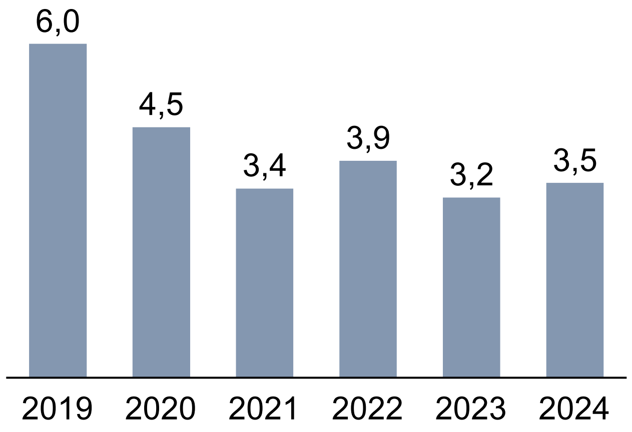
USCALE GmbH
www.uscale.digital

Results

1 High number of actively used charging services

After the rise in energy prices in 2022, the number of charging services actively used fell. Now the number of actively used charging services is rising again.

Number of actively used charging services (eMSP):



N = 2.688 (2024)

„Which charging services do you actively use?“ (Multiple answer possible)

Results

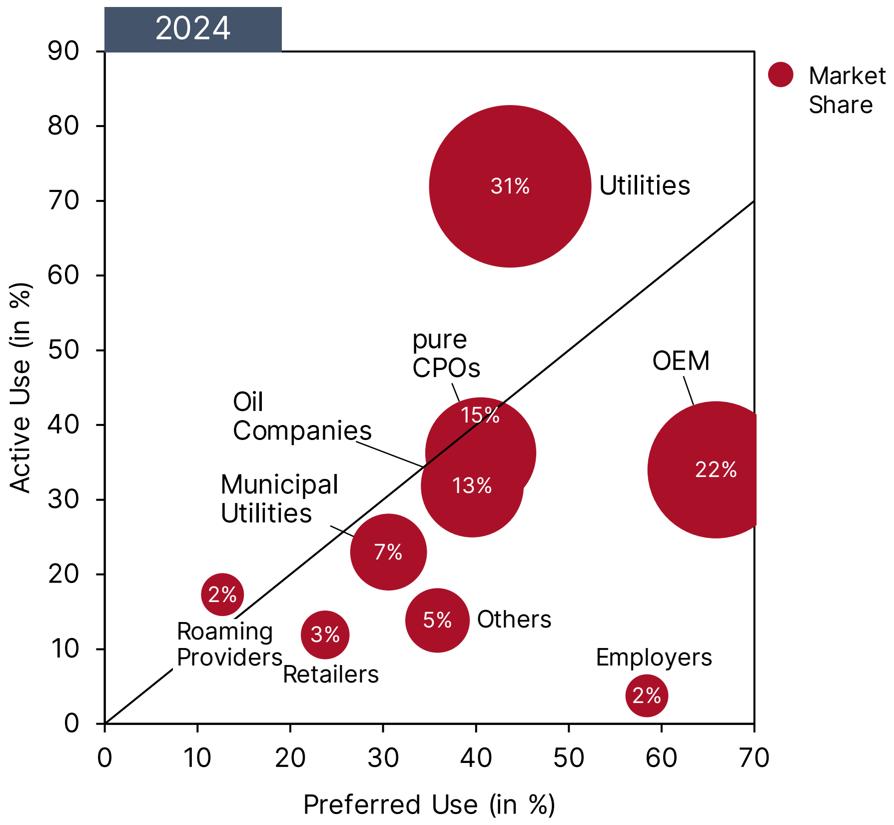
2

Charge point operators (CPOs) and mineral oil companies are gaining ground

National and municipal utilities together continue to hold the largest market share (together 38%).

Pure charging station operators such as IONITY or Tesla (for non-Tesla drivers) were able to increase their market share to 15%.

The cooperation with ADAC also allows ARAL pulse to significantly increase its market presence. This increases the oil companies' market share to 13%.



N = 2.688

"Which charging services or apps do you actively use?"
vs.
"Which charging service or app do you most frequently?"

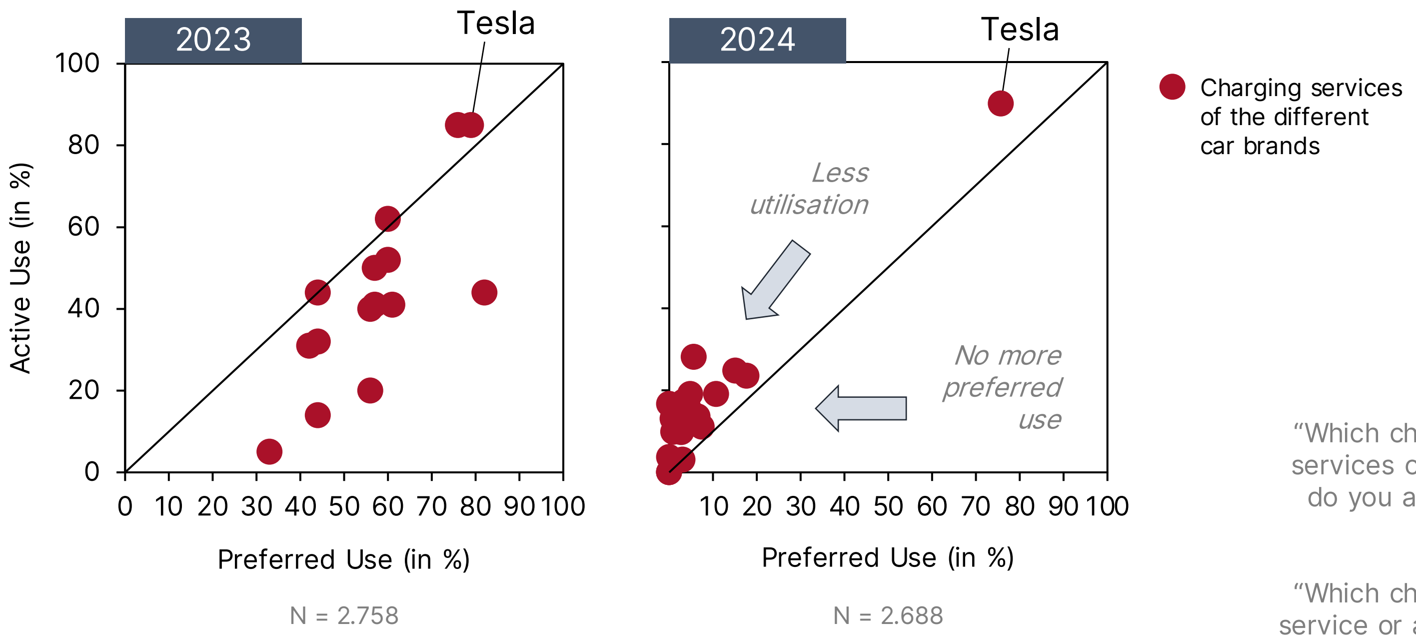
Results

3

Car manufacturers' charging services are losing ground significantly

Most car manufacturers offer their own charging services with the vehicle, all of which are losing significant market share.

Only Tesla is able to maintain its position.



"Which charging services or apps do you actively use?"
vs.
"Which charging service or app do you most frequently?"

Background

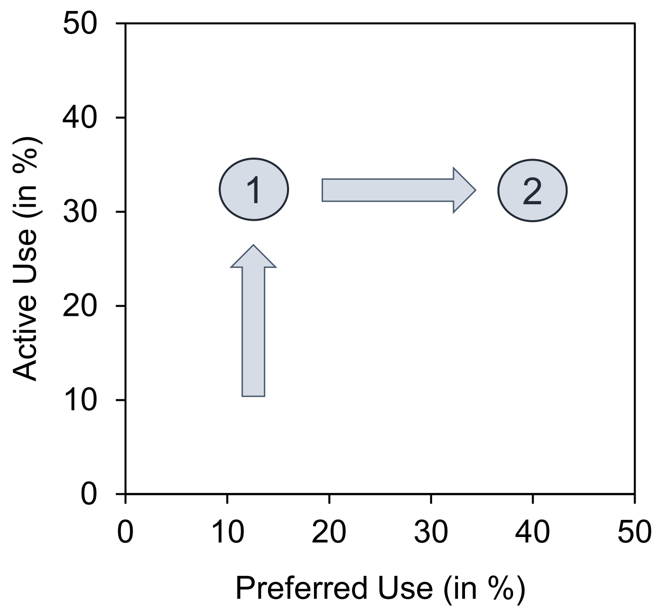
Two key figures are relevant for evaluating the success of a charging service provider (eMSP offers):

1 **Active Use**

In order to make revenue, providers of charging services have to be 'on the radar' of customers in the first place. This happens, for example, when a customer has a charging card from the provider and uses it at least occasionally.

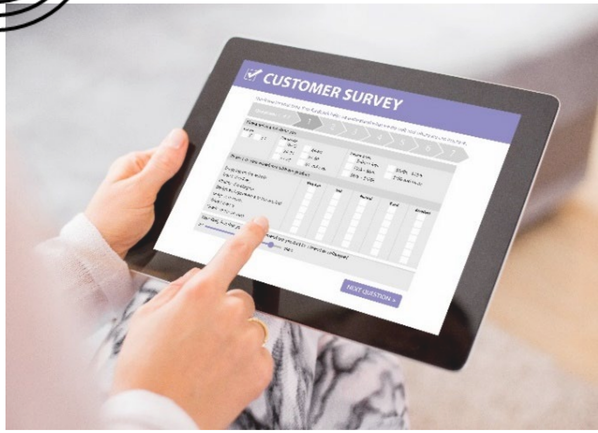
2 **Preferred Use**

Charging services are usage-based business models. Issuing a charging card alone is therefore not enough. From the provider's point of view, it is important that customers find the charging service so attractive that they prefer to use it.



Charging Services Study 2024

About this Study



Survey and Method:

- Target Group: Owners of fully battery-powered electric vehicles (no plug-in hybrids) that charge at least occasionally at public charging stations
- Survey: Online-Survey (CAWI)
- Market: Germany
- Recruiting: Social Media
- Lenth of Interview: 15 - 20 min
- Field phase: August - September 2024
- total: N = 2.688

Objective

Initial situation:

- Charging services not only offer service providers sources of revenue, but also an important tool for customer loyalty. The prerequisite is that EV drivers actively and - more importantly - preferentially use the services.
- The high number of eMSP and CPO offerings is leading to fierce competition in a rapidly growing market.

Questions:

- Which eMSP or CPO offers are EV drivers actively using and which one are they preferring? How high are the market shares of the most important providers (groups)? Which trends arise over time?
- What are the drivers and barriers for the preferences? Which role do tariff models play? How can providers position themselves successfully?
- Which influence do payment methods have on the selection decision?
- What differences are there between different target groups?

SCALE YOUR USER
SCALE YOUR BUSINESS

Dr. Axel Sprenger

Managing Director
USCALE GmbH

mail axel.sprenger@uscale.digital
fon +49 172 - 1551 820
web www.uscale.digital
post Silberburgstraße 112
70176 Stuttgart