Study extract
(full report: approx. 110 pages)

Private Charging Study 2024

Charging at home from the user's perspective

USCALE GmbH
uscale.digital

Objective

Initial situation:

- While charging at home is and is likely to remain the most important charging location for EV drivers, the number of providers on the market is increasing.
- This increases the pressure on manufacturers and importers to stand out from the competition with attractive and customised quotations and to withstand the pressure to consolidate.
- For private charging, there is a lot of potential for providers to offer new products and services beyond a wall charger.

Question:

- How do EV drivers charge today?
- What information are buyers of private charging solutions looking for? Where do they buy or want to buy?
- Are there differences between the target groups?

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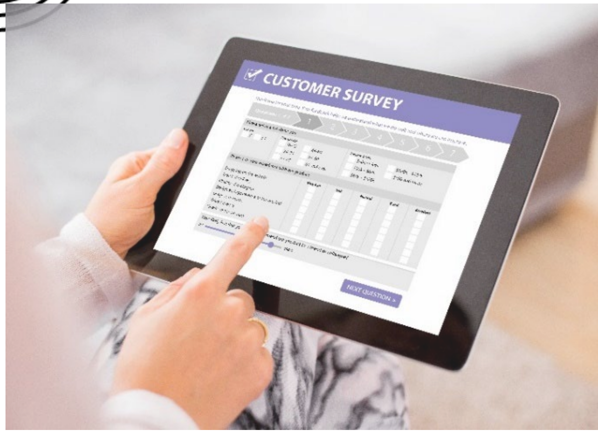
Target group



Survey and sample:

- Target Group (chapter 2): EV driver
  Sample size: N = 2.986*
- Target Group (chapter 3): EV driver who charge at home
  Sample size: N = 1.223 (subgroup of the total sample)
- Target Group (chapter 4): EV driver with company car
  Sample size: N = 497 (subgroup of the total sample)
- Survey: Online-Survey (CAWI)
- Market: Germany
- Recruting: Social Media, Access Panel *
- Length of Inverview: 15 - 20 min
- Field period: July - September 2024

* The majority of participants in the social media panel are early EV adopters and tech-savvy individuals. The report refers to this group as INNOVATORS.

The participants in the Access Panel are generally less tech-savvy and only decided in favour of an electric vehicle at a later stage. The report describes this group as the Next SEGMENT.

Recruitment background

The selection of survey participants

The eMobility market is in the ramp-up phase, i.e. the majority of current EV drivers belong to the group of so-called **innovators** and **early adopters** in the early phase. Only a small proportion of EV drivers come from the **early majority** group. *

Recruitment is based on the assumption that it is mainly innovators who can be reached in specialist forums and on **social media**, whereas the early majority can be reached in **access panels**. In recent years, we have implicitly assumed this connection. We now have very strong confirmation of this assumption from the USCALE persona study: the majority of participants from the social media panel are "eco-enthusiastic techies", while the majority of access panel participants are spread across the other segments.

In order to achieve as **representative a distribution** as possible, a ratio of social media to access panel study participants of around **50 to 50** was selected.

In the report, the two groups are representative of different adopter groups (social media panel = innovators and early early adopters, access panel = later early adopters and early majority. If the results differ for both groups, they indicate a trend.

* This classification is based on Rogers' diffusion model (LINK).

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Study dashboard for your own analyses

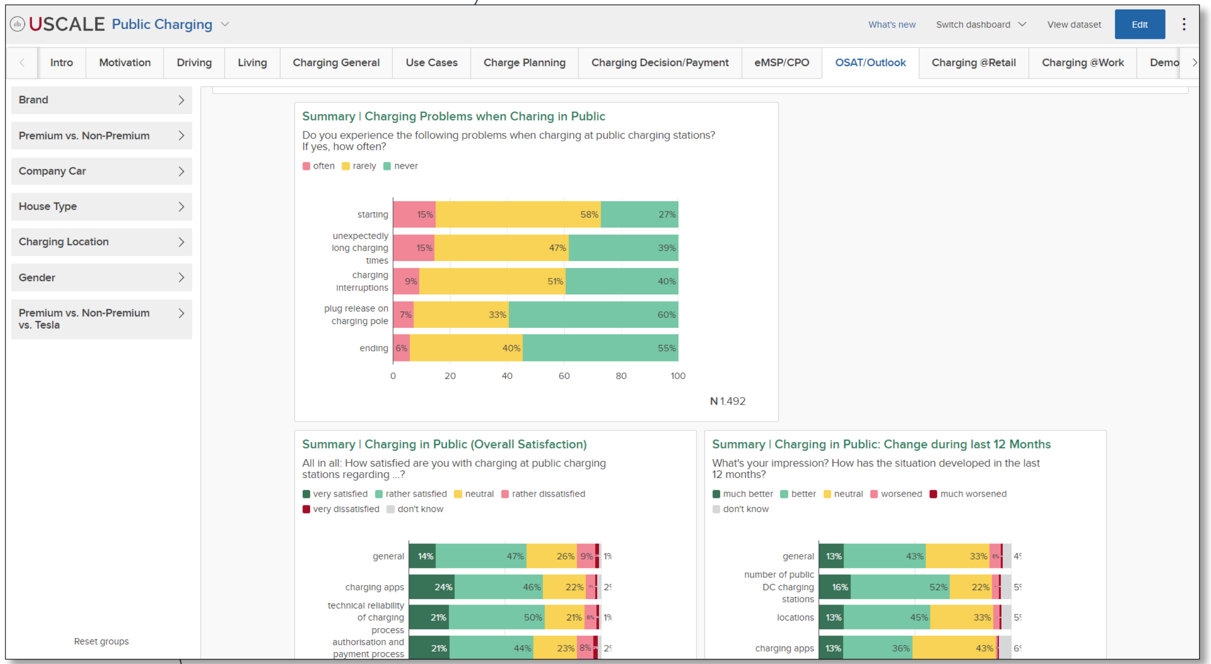
Deep dives and brand splits.

The breadth and depth of information in the focus studies is considerable.

The private charging study therefore also includes a dashboard for further splits. For example, differences between certain sub-target groups and certain brands can be displayed separately.

Example illustrations

Subject areas



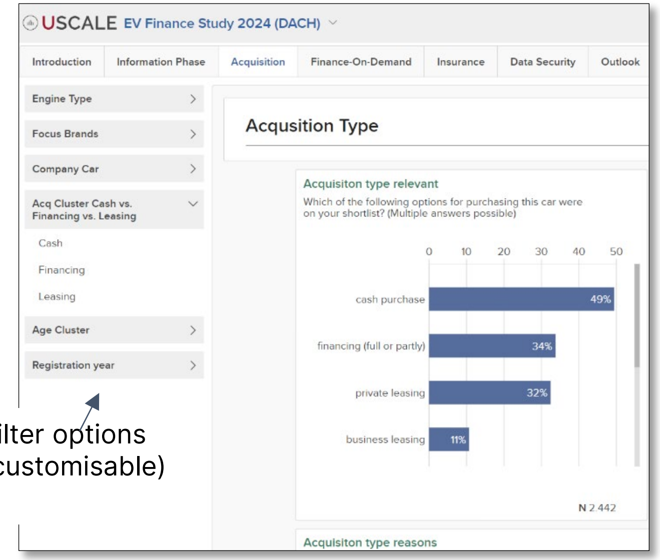
Filter options

Study dashboard for your own analyses

Analysis options in the dashboard

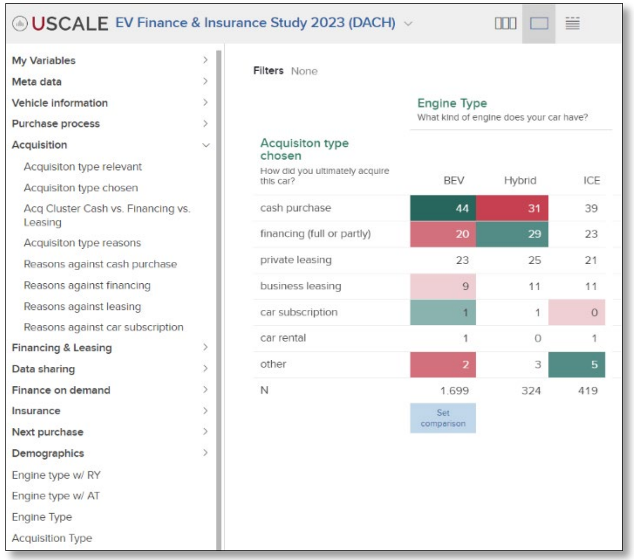
The dashboard provides access to all detailed data. It allows you to carry out your own analyses and download any data splits.

Split of all results by sub-target groups:



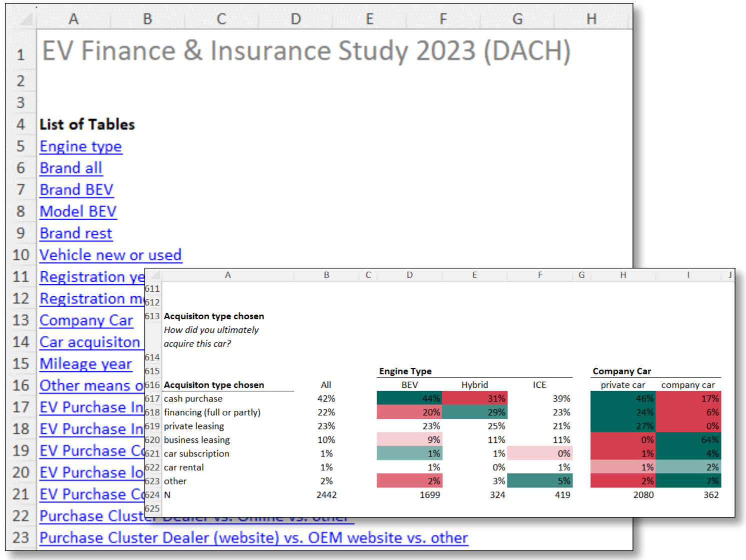
Filter options (customisable)

Correlations and statistical analyses:



Download all data as xls and ppt:

Example illustrations



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Management Summary

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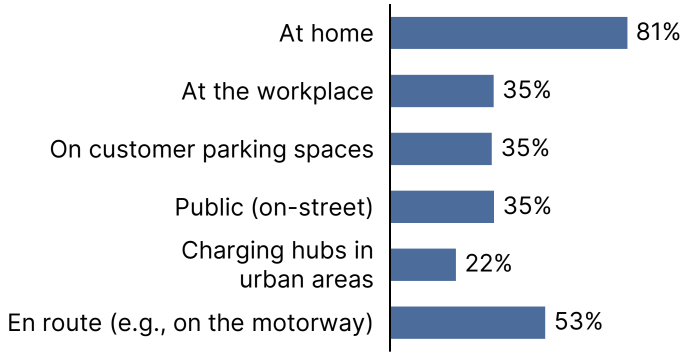
Charging at home highly relevant and attractive.

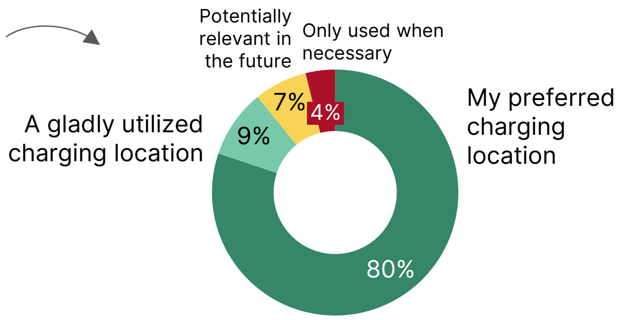
Furthermore, over 80% of EV drivers charge their car at home.

For 80% of those who can charge at home, the "home" charging location is also the central charging location.

Charging locations and the meaning of the charging location "at home":



"Where do you charge your EV?"



N = 2.407

Charging at home = yes: "What role does the charging location play in your charging behaviour?"

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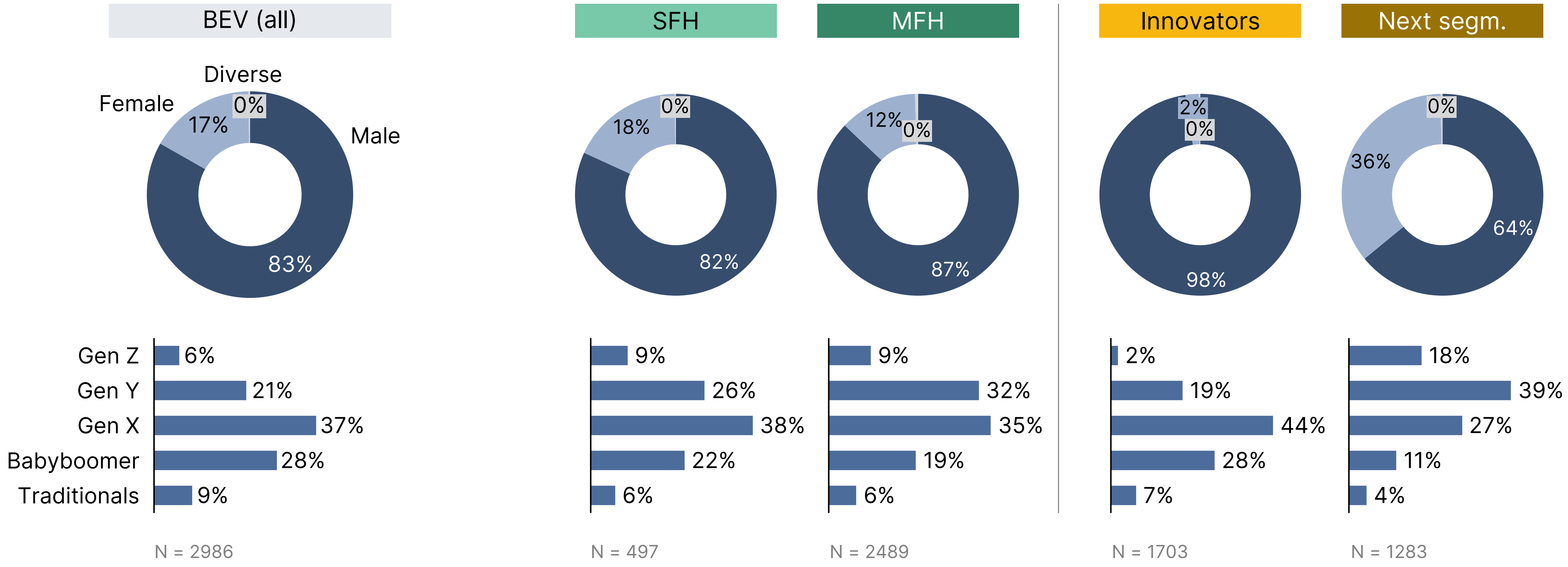
Demography

Gender and age

The innovators are predominantly male. The proportion of women in the Next segment corresponds to the proportion of women among new combustion car buyers.

"You are...?"

"How old are you?"

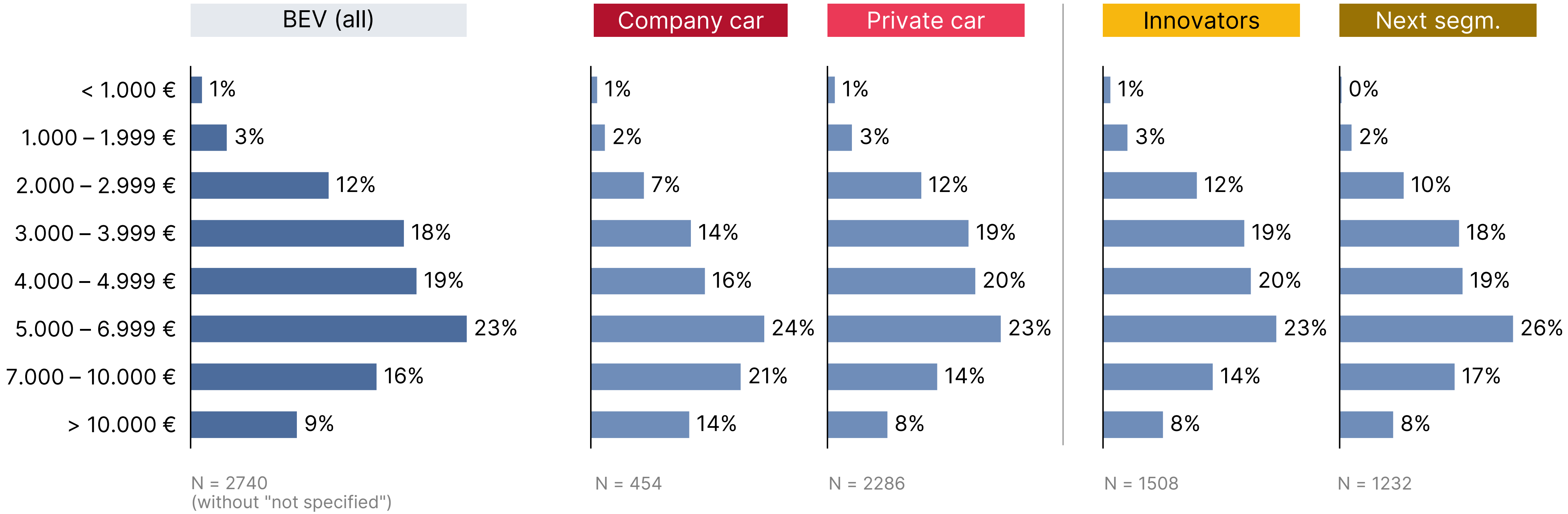


USCALE

Demography
Income

59% of those surveyed have a net household income of € 5,000 or more. As expected, the income of company car drivers is higher than that of private car drivers.

"What is your net monthly household income?"



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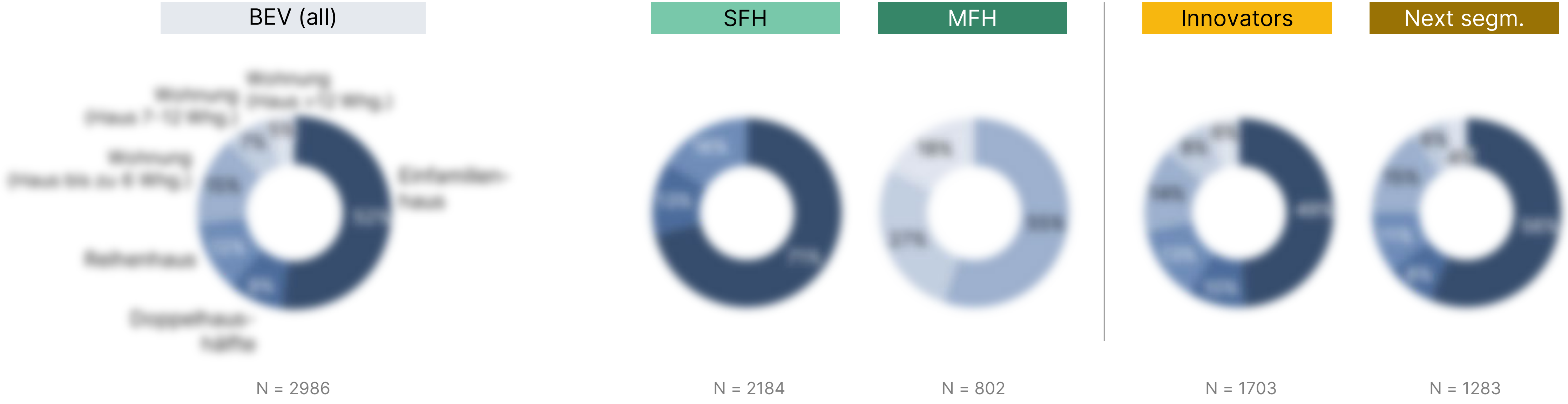
Living

House type

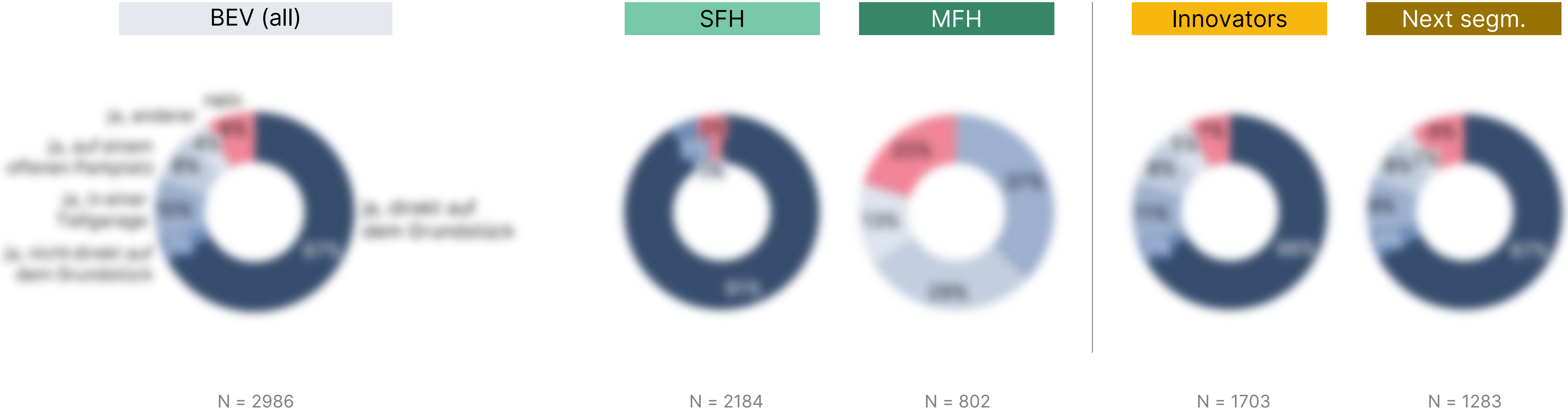
"What kind of house do you live in?"



Living

Parking situation

"Do you have your own car park at home?"



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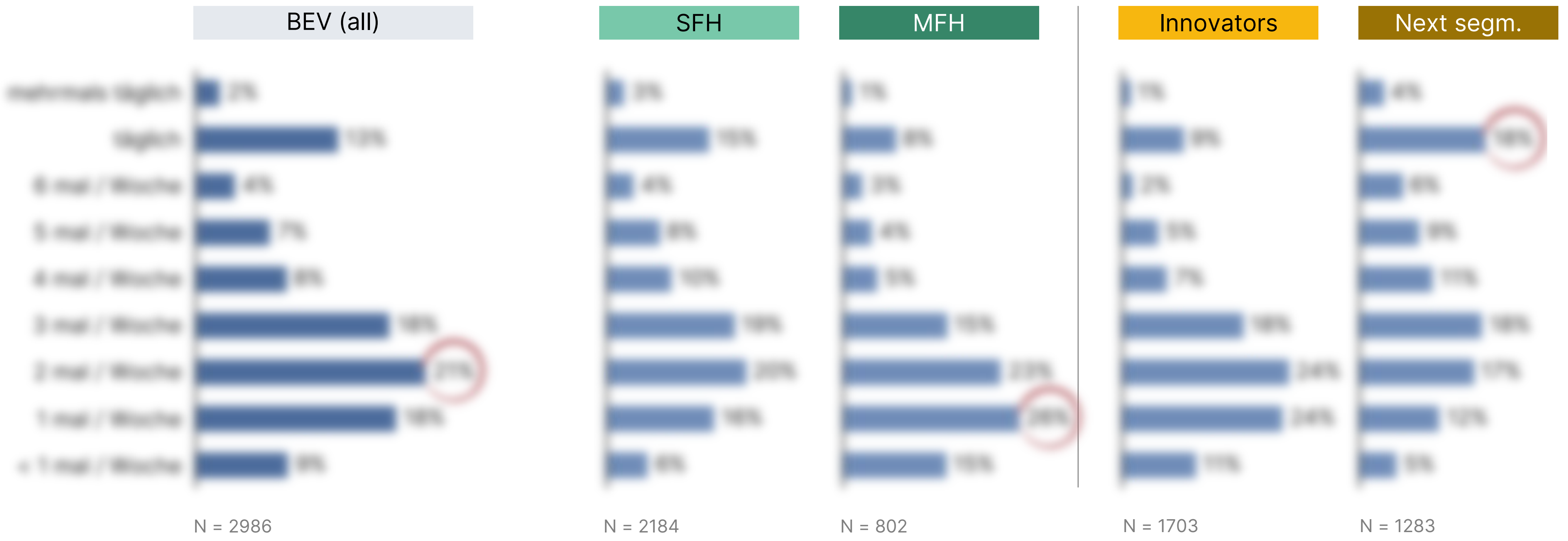
Charging locations and habits

Charging routine

"How often do you usually charge your [EV] per week?"

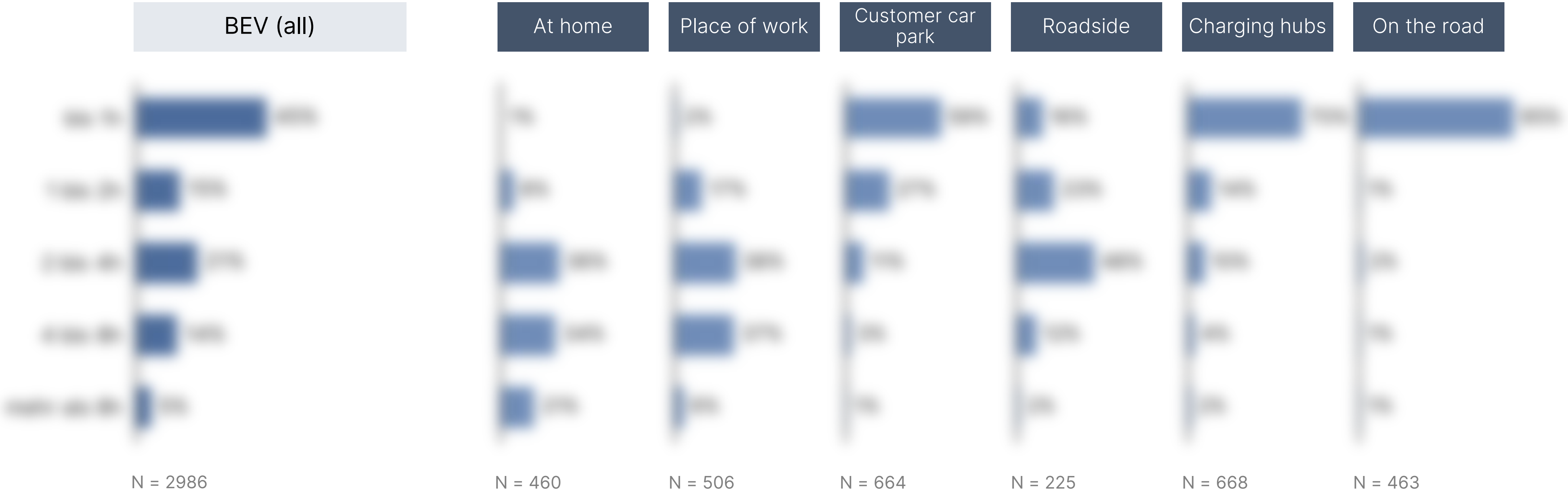


Charging locations and habits

Charging time

"If you are charging [charging location]:

How long is your [EV] usually plugged in at this charging location?"

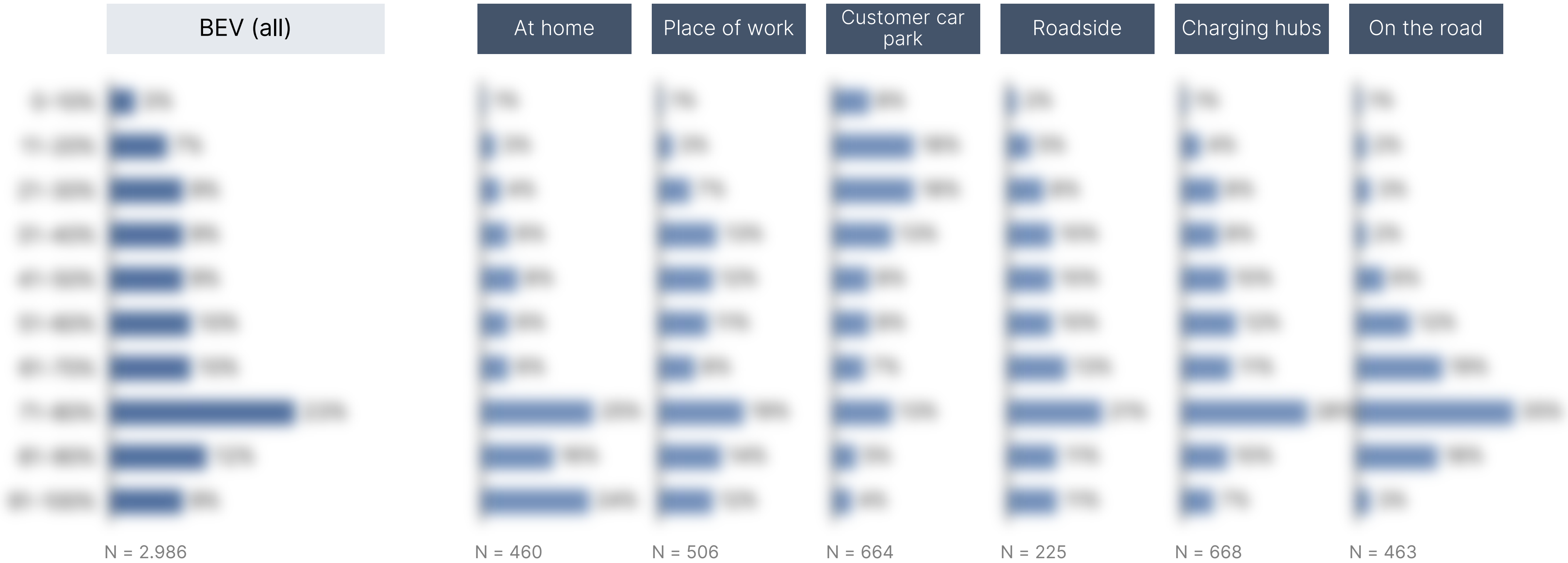


Charging locations and habits

Charged energy quantities

"If you are charging [charging location]:

What % SoC (battery capacity) do you usually charge when plugged in?"



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Charging technology purchase process

Sources of information helpful?

"Where did you get your information"

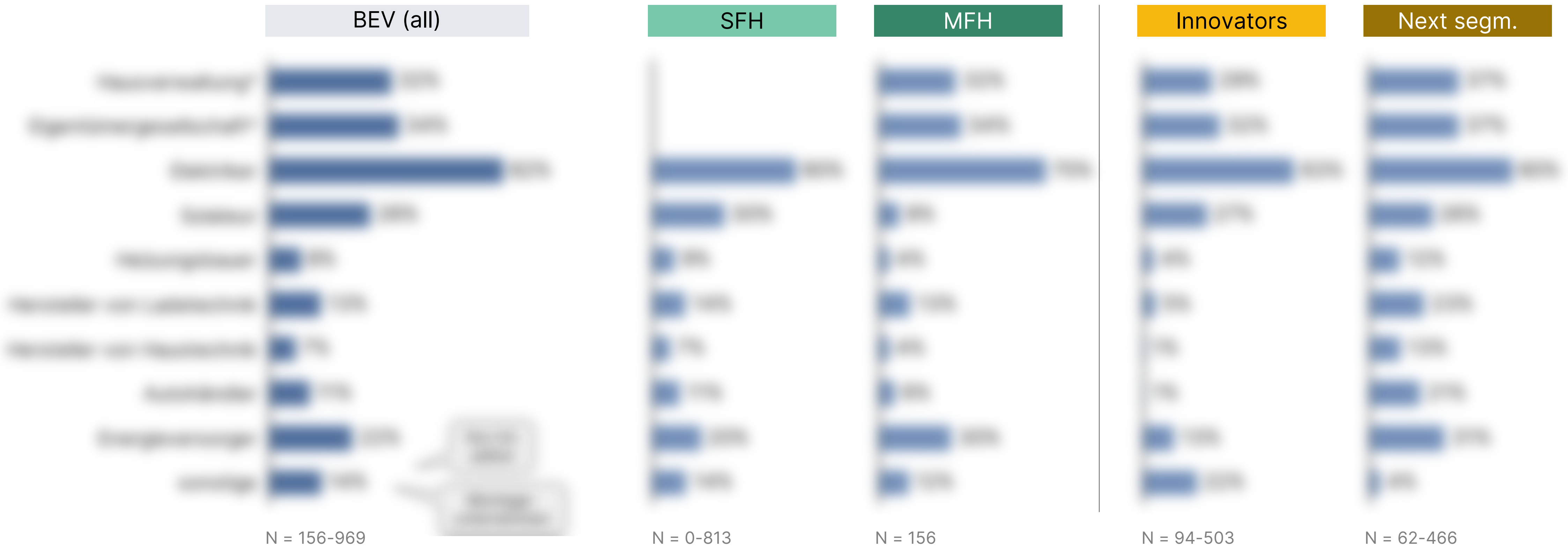
vs.

"How helpful were the sources of information?"

Parties to the proceedings

"Who was involved in the planning?"

(multiple answers possible)



* MFH only

SCALE YOUR USER
SCALE YOUR BUSINESS

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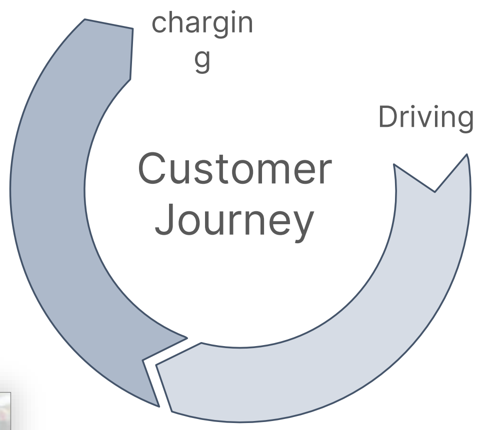
USCALE eMobility focus studies

Focus studies on all touchpoints

Business models

- re:thinking customers — eMSP/CPO Charging Services Study — Research by USCALE
- re:thinking customers — Smart Charging Study — Research by USCALE



charging

- re:thinking customers — Wallbox Pricing Study — Research by USCALE
- re:thinking customers — Private Charging Study — Research by USCALE
- re:thinking customers — Public Charging Study — Research by USCALE
- re:thinking customers — Charging Persona Study — Research by USCALE
- re:thinking customers — Charging Payment Study — Research by USCALE

Buy

- re:thinking customers — EV Retail Study — Research by USCALE
- re:thinking customers — EV Financing and Insurance Study — Research by USCALE

Driving

- re:thinking customers — EV Benchmarking Study — Research by USCALE
- re:thinking customers — EV After-Sales Study — Research by USCALE