

eMSP/CPO Charging Services Study – EUROPE

Charging Services for Electric Cars from the Customer's Perspective



Study Results

1

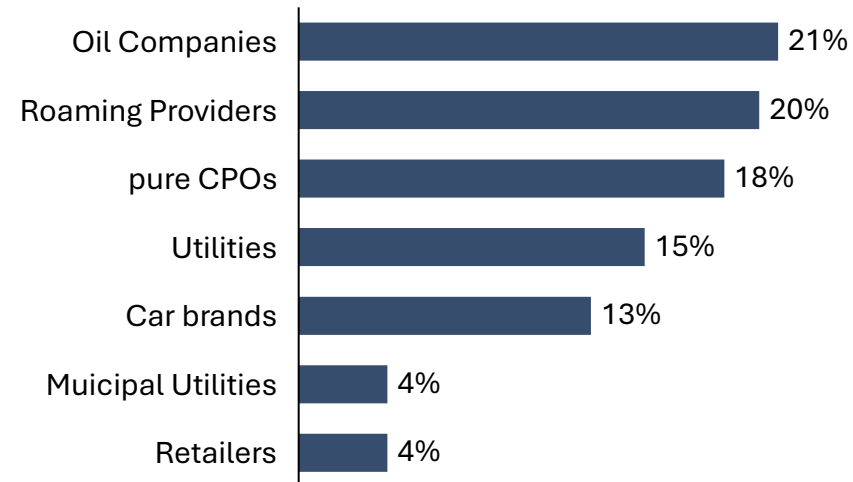
Oil industry takes the lead in the charging market

The mineral oil industry was able to significantly increase its market share among the charging services used last year.

A good 20% of EV drivers in the six European countries surveyed use a petrol station brand’s charging service.

Market shares of the provider groups for charging services:

(average across all countries surveyed)



“Which of the charging services just mentioned do you prefer to use?”

Study Results

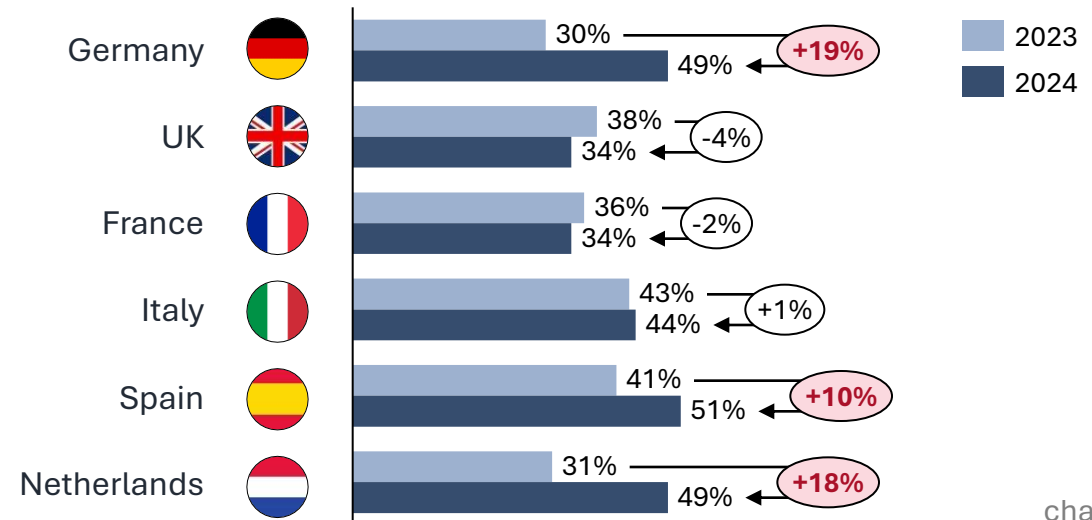
2

Significant consolidation in the charging market in some countries

The charging market has many providers. In the three markets of Germany, Spain and the Netherlands, the top three providers have been able to increase their market shares to such an extent that they now have a total market share of around 50%.

The expected consolidation is still awaited in the other countries.

Market share of the TOP 3 charging electricity providers for public charging:



Sum of TOP-3 answers:
 “Which of the charging services just mentioned do you prefer to use?”

Study Results

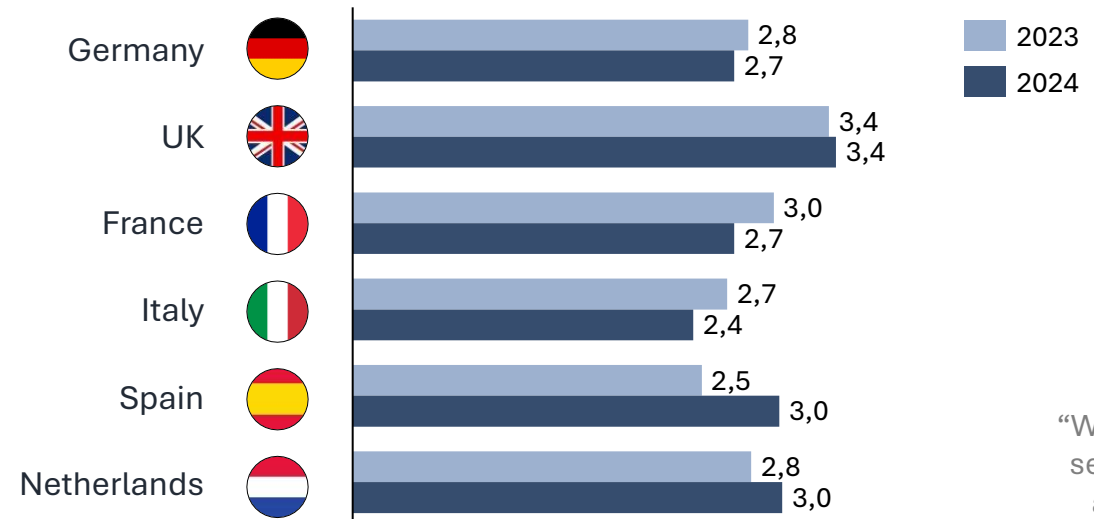
3

Three actively used charging services in most countries

In all markets, EV drivers actively use several charging services to charge in public.

Even if consolidation effects among providers can already be observed in individual markets, these are not yet reflected in the number of charging cards and apps in use.

Number of actively used charging services / apps:



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

Target Group

Survey:

- Target Group: BEV Owners (no PHEV) that charge at least occasionally at public charging stations
- Survey: Online-Survey (CAWI)
- Market: Germany, UK, France, Italy, Spain, Netherlands
- Recruiting: Multiple access panels
- Lenth of Interview: 15-20 min
- Field phase: August-November 2024

Sample sizes:

- Germany: N = 950
- United Kingdom: N = 516
- France: N = 501
- Italy: N = 501
- Spain: N = 501
- Netherlands: N = 514



Objective

Initial situation:

- The high number of eMSP and CPO offerings is leading to fierce competition in a rapidly growing market.
- 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.

Research 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 reasons for the preferences?
- How can providers position themselves successfully? What differences are there between different target groups?





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