USCALE

EXAMPLE SLIDES

Charging Tariff & Pricing Study 2025

Customer loyalty and utilization with the best charging tariffs

USCALE GmbH
www.uscale.digital

Objective

Initial situation:

— The market for charging tariffs is characterized by a large number of providers and correspondingly strong competition.

— As new customer segments move into electromobility, the boundary conditions and preferences of users are constantly changing.

— Providers must position themselves and also differentiate themselves. The question of the relevant decision criteria for the various user groups is therefore becoming increasingly important.

Questions:

— What role does the price play? What influence do other tariff features have on the tariff decision?

— How high is the acceptance of tariff increases before users decide to switch to a different tariff?

— What differences are there between different target groups and depending on other upstream decisions?

Target group

Survey:

—	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
—	Recruitment:	Social media, access panel
—	Duration of the interview:	15 minutes
—	Data collection:	April 2025

Size of the sample:

—	Total:	N = 1,722
	of which:	
—	Pioneers*:	N = 649
—	Early Adopters:	N = 1,073

* The majority of participants in the social media panel are early EV adopters and more tech-savvy people. This group is referred to as pioneers in the report.

Respondents from the Access Panels are generally less tech-savvy and only switched to an EV at a later stage. The report refers to this group as the Early Adopters.

Preliminary remarks on segmentation

In order to identify trends, this study differentiates between two adopter segments, the "pioneers" and the "Early Adopters".

Background to segmentation:

— The best-known model for the ramp-up of innovations segments adopters according to the time at which they switch (Fig.). It assumes (simplistically) that the time of switching correlates with motivation. Criticism: Many EV enthusiasts switch later due to the often long car ownership periods.

— This is why the present study segments according to involvement (i.e. what is implicitly assumed with the above-mentioned so-called Rogers segments). Operationally, the study maps this via recruitment:

  — Pioneers (high involvement): Recruitment via social media
  — Early Adopters (lower involvement): Recruitment via access panel

If the results of pioneers and Early Adopters differ, this indicates a trend.

Segments during the ramp-up of electromobility*:

BEV market share
in Germany in 2024 (13.5%)
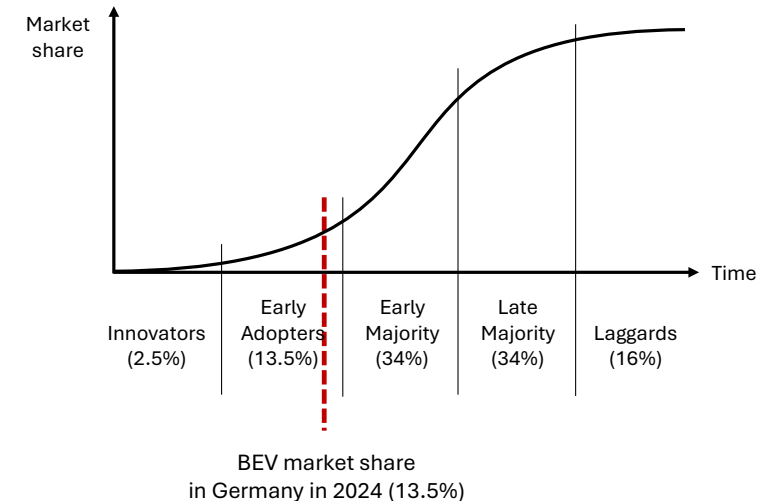
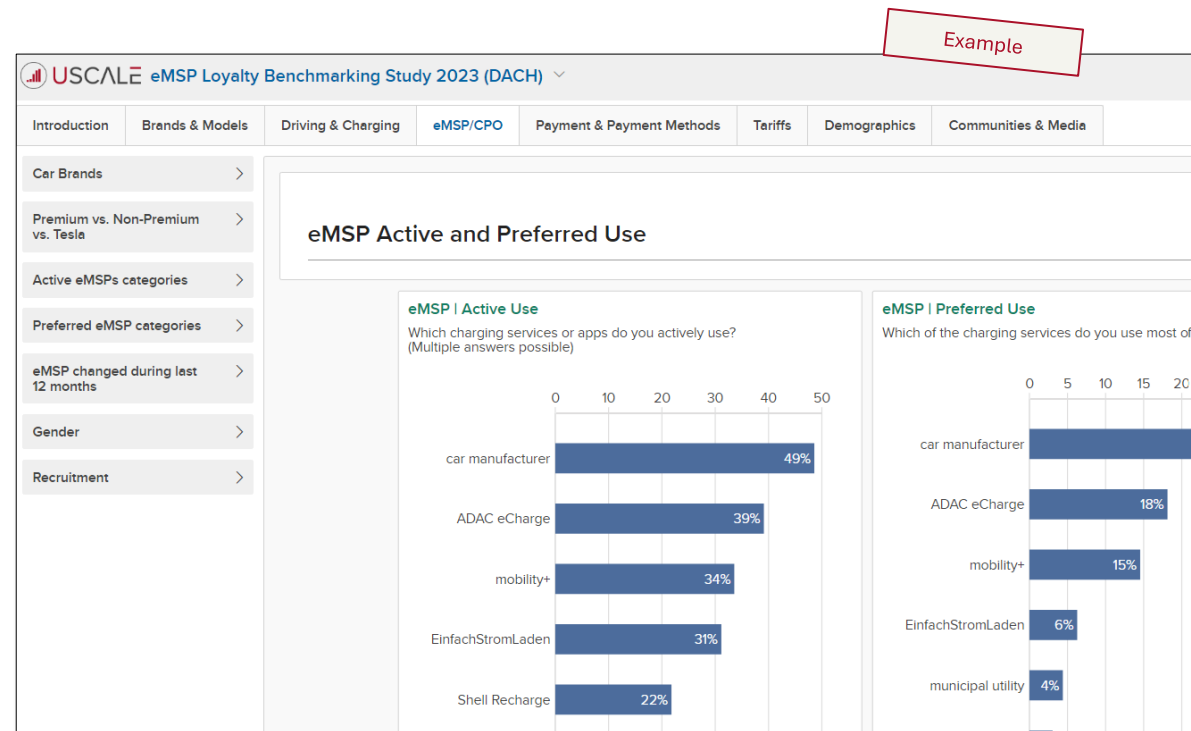* The classification shown is based on Everett Rogers' diffusion model (LINK).

Dashboard for individual analyses

Deep dives on individual subgroups
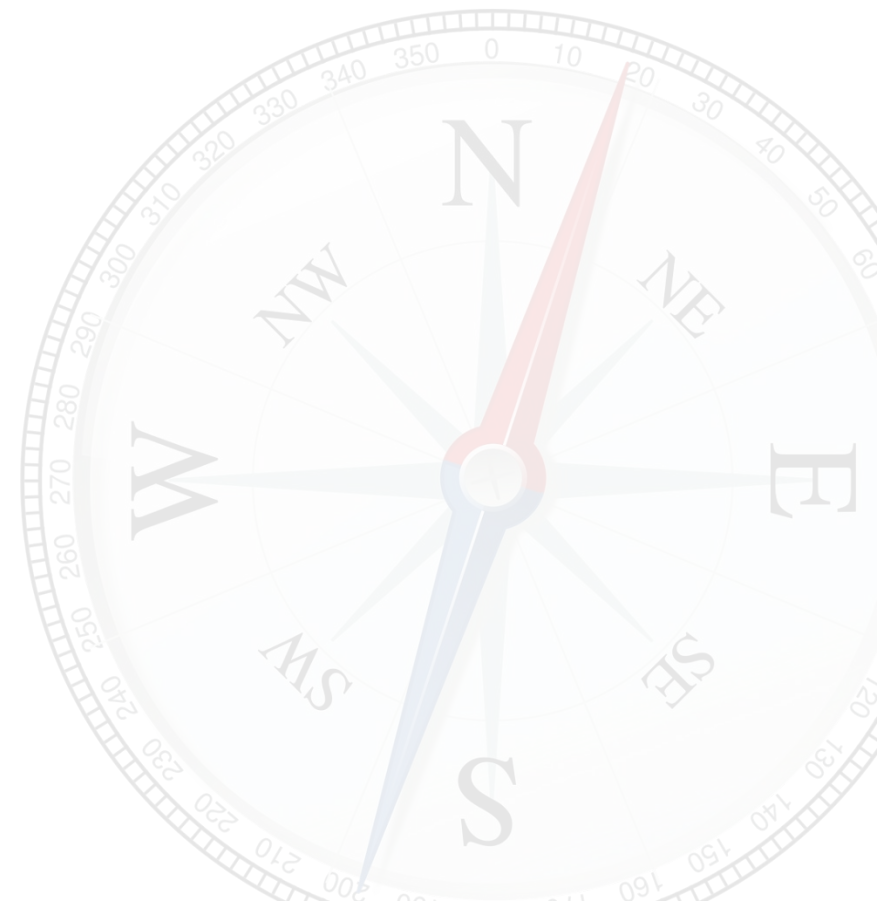
Only selected splits are shown in this document.

The associated dashboard allows splits according to any other variable.

To register, please get in touch with your USCALE contact person.

Example

Contents
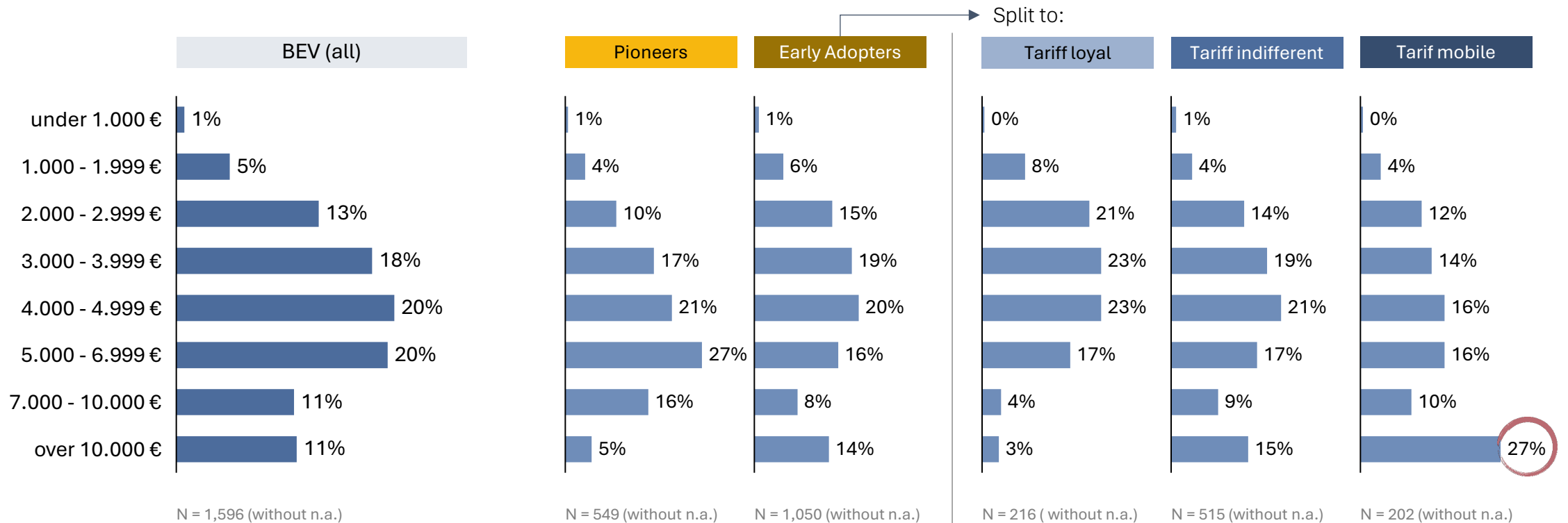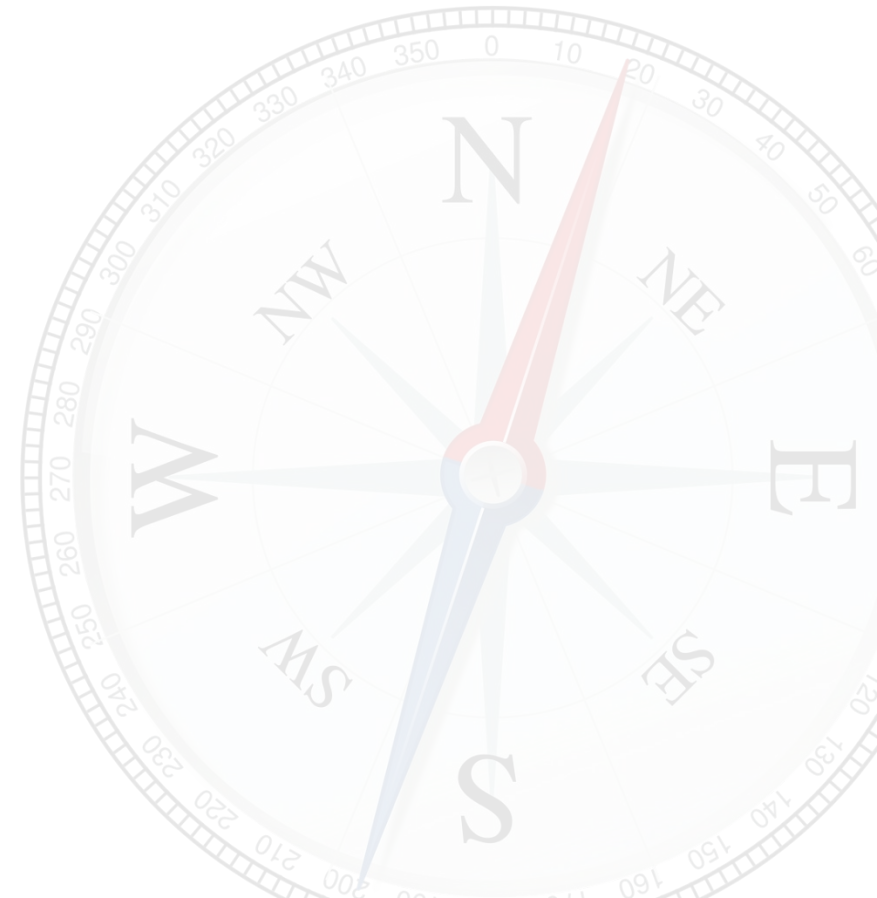
Income

EV drivers have an above-average income.
The proportion of high earners is even higher among the tariff-mobile.

"What is your net monthly household income?"

Split to:

	BEV (all)	Pioneers	Early Adopters	Tariff loyal	Tariff indifferent	Tarif mobile
under 1.000 €	1%	1%	1%	0%	1%	0%
1.000 - 1.999 €	5%	4%	6%	8%	4%	4%
2.000 - 2.999 €	13%	10%	15%	21%	14%	12%
3.000 - 3.999 €	18%	17%	19%	23%	19%	14%
4.000 - 4.999 €	20%	21%	20%	23%	21%	16%
5.000 - 6.999 €	20%	27%	16%	17%	17%	16%
7.000 - 10.000 €	11%	16%	8%	4%	9%	10%
over 10.000 €	11%	5%	14%	3%	15%	27%

N = 1,596 (without n.a.) N = 549 (without n.a.) N = 1,050 (without n.a.) N = 216 (without n.a.) N = 515 (without n.a.) N = 202 (without n.a.)

Contents

Price/performance type

Vor allem den Pionieren ist der Preis wichtiger als die Leistung eines Ladeangebots.
Bei Early Adoptern und Tarif mobilen dominiert die Leistungsorientierung.

Charging at public:

"What role does price play for you compared to performance?"

| BEV (all) | | Pioneers | Early Adopters | | Tariff loyal | Tariff indifferent | Tarif mobile |

Split to:

I look at the performance first, then the price **41%**

I look at the price first, then the performance **48%**

I am undecided **11%**

Segment formation

Price-oriented

Undecided

Performance-oriented

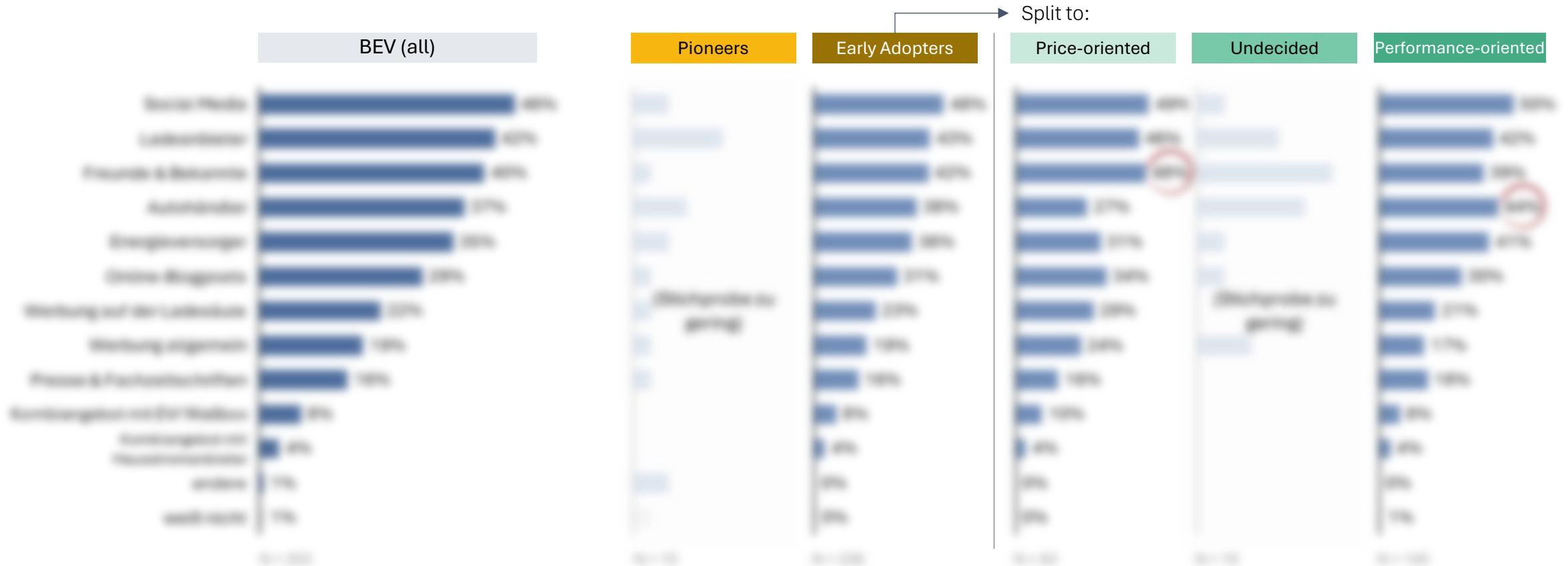N = 1,722

N = 649

N = 1,073

N = 222

N = 523

N = 204

USCALE
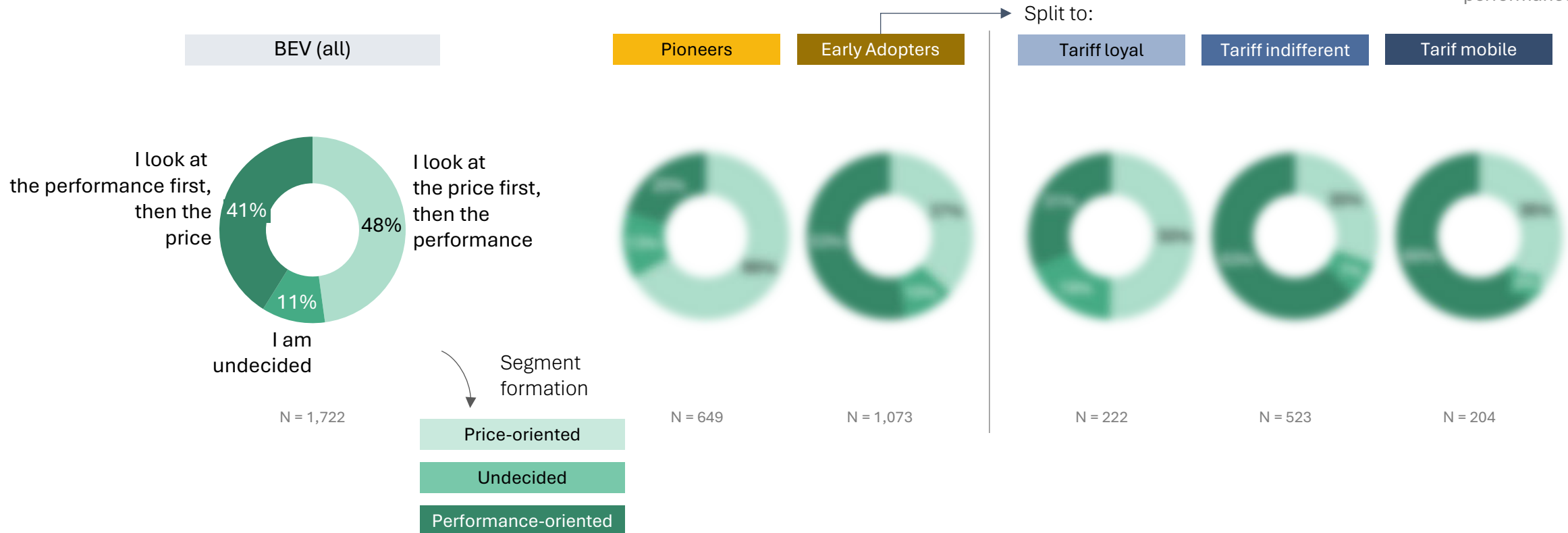
Relevant source of information for quick decision-makers

Die Unterschiede im Infoverhalten sind groß: So informieren sich die Performance-orientierten Schnellentschlossenen z.B. häufiger beim Autohändler, während Preis-Orientierte sich häufiger an Freunde und Bekannte wenden.

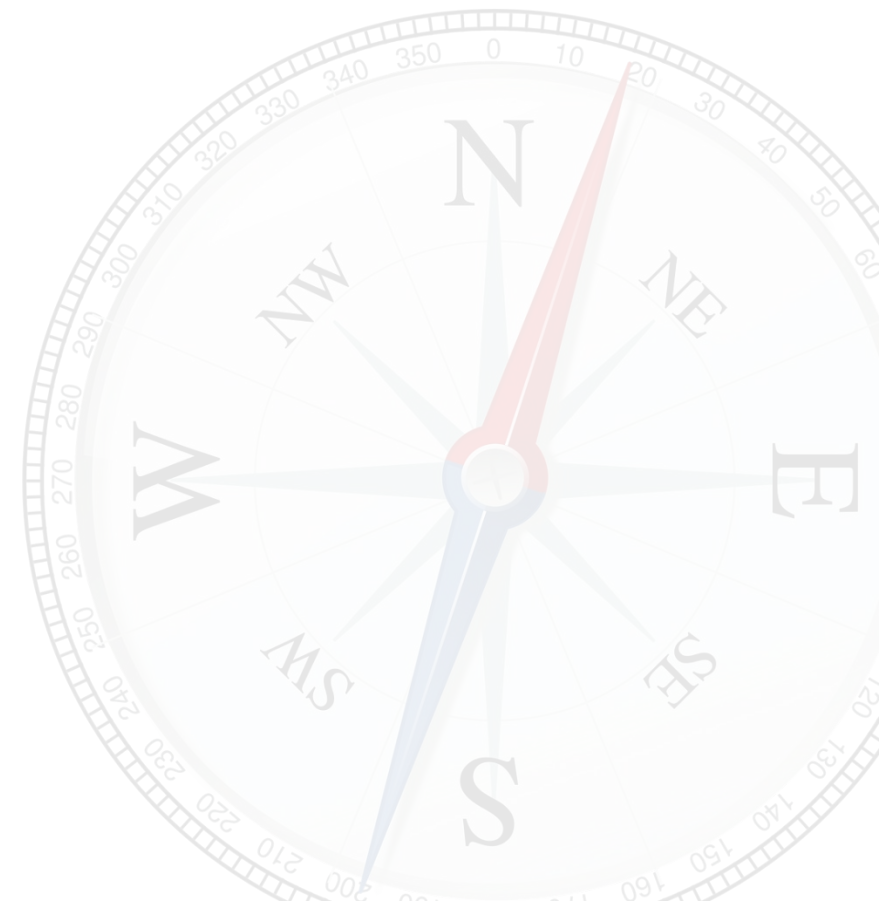**Research effort = first option selected:**

"How did you find out about the charging tariffs you use?"

Split to:

Charging Tariff & Pricing Study 2025

Contents

KANO analysis
(Introduction to the method)

The **Kano model** of customer satisfaction describes the relationship between the offering of certain features and the expected satisfaction. It therefore also describes the importance of specific product features for the selection decision.

As a result, the model divides product features into 5 categories:

— The client only becomes aware of **hygiene features** (must-have features) if they are not fulfilled, which leads to a high level of dissatisfaction.

— The client is aware of **performance features** (target characteristics); they create satisfaction depending on the degree of fulfillment.

— **Wow features** (optional features) are features that the client does not necessarily expect. They distinguish the product from the competition and generate enthusiasm.

— **Neutral features** are irrelevant to the client both in their presence and in their absence.

— **Undesired features** lead to dissatisfaction if present.

The allocation of tariff characteristics is determined via a positive-functional and a negative-dysfunctional question.
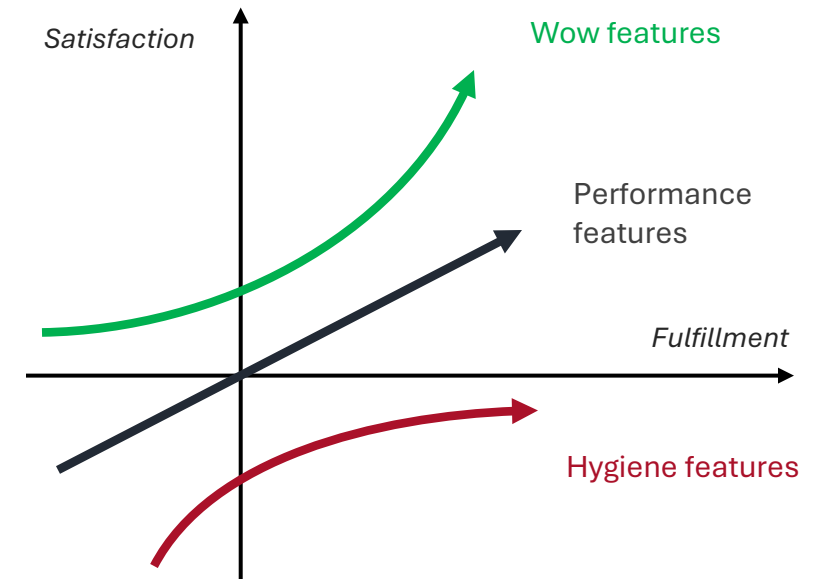
KANO analysis: Summary (sorted by enthusiasm)

"What would you think if a charging tariff had the following features?"

vs

"What would you think if a charging tariff *did not* have the following features?"
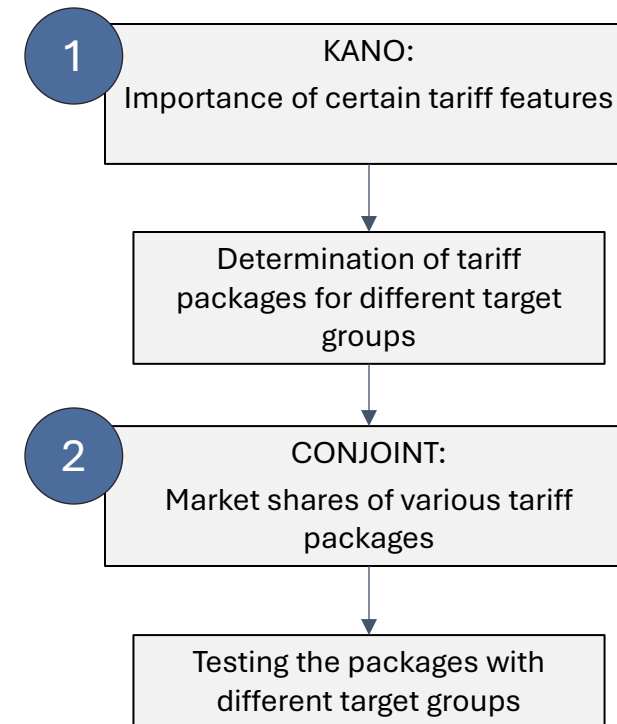
KANO analysis
(Notes on handling the KANO results)

The preceding analysis shows different basic, performance and enthusiasm factors for tariff-trusting, -indifferent and mobile.

In order to determine the optimal tariff combination for your own target group, other target groups can be put together and tariff packages analyzed.

Once suitable tariff packages have been identified with KANO, they can be tested and optimized for market share in CONJOINT.

1 KANO:
Importance of certain tariff features

Determination of tariff packages for different target groups

2 CONJOINT:
Market shares of various tariff packages

Testing the packages with different target groups

Charging Tariff & Pricing Study 2025

Contents

Conjoint analysis
(Introduction to the method)

The conjoint method maps the choice of tariff.

When choosing the right tariff, users weigh up several criteria before making a decision.

In order to determine which criteria have which influence on the choice of tariff, the participants were repeatedly presented with different tariff constellations in the survey, from which they had to choose their preference.

Each offering consisted of a combination of several characteristics that were compiled by an algorithm. The survey provided thousands of individual ratings, which were evaluated as part of a multivariate analysis.

Example

USCALE

(1/7) Folgendes Szenario: Sie sind in einer großen Stadt. Ihre Batterie ist fast leer, d.h. Sie müssen laden, um zurück nach Hause fahren zu können. Sie haben mehrere Möglichkeiten. Welche wählen Sie?

Möglichkeit 1	Möglichkeit 2	Möglichkeit 3
Ladeleistung **50 kW**	Ladeleistung **150 kW**	Ladeleistung **300kW**
Direkt **keiner** auf Ihrem Weg	Direkt **keiner** auf Ihrem Weg	Direkt **2km Umweg** auf Ihrem Weg
Angebote **Supermarkt**	Angebote **keine**	Angebote **Fachhandel**
Ladesäulen- Betreiber **anderer CPO (Roaming bzw. Ad-hoc)**	Ladesäulen- Betreiber **dein präferierter CPO (mit Ladevertrag)**	Ladesäulen- Betreiber **anderer CPO (Roaming bzw. Ad-hoc)**
Location **normaler Sicherheitsstandard**	Location **normaler Sicherheitsstandard**	Location **hell beleuchtet + Kamera**

Conjoint analysis
(Instructions for the simulation tool*)

Calculation of the market potential of various charging offers

The potential market position of a product depends on the number and attractiveness of competitive offers. The market potential of an offering can therefore only be estimated relative to its alternatives.

As the variety of feature combinations and target groups is very large, the market potential is calculated in a simulation tool depending on all the features queried.
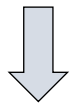
LINK to the simulator

* The simulation tool is available until at least 12/25.

Various sub-target groups can be selected for the analysis.

Example

54% of clients would choose tariff option 2, the rest option 1

For 12% of respondents, the DC price was the decisive factor in their choice.

Example: Comparison of two tariffs with different AC and DC prices, rest identical

Contents

1. Management Summary

2. Living, driving and charging behavior of the target group
   – Segmentation of the target group according to tariff types and price/performance type
   – Demographics, living and driving habits
   – Charging habits

▶ 3. **Customer loyalty with tariffs**
   – Customer journey for tariff selection
   – Relevance of tariff features (KANO analysis)
   – Market shares for tariff/feature combinations (CONJOINT analysis)
   – Satisfaction with charging tariff
   – Disloyalty

4. Deep dive on selected tariff features
   – Variable tariffs
   – Subscription plan with base fee
   – Bonus programs
   – Blocking fees

5. Cross-selling of home and public charging electricity

Charging tariffs: possible provider changes

Over 80% regularly or occasionally consider switching providers. Early Adopters show slightly higher customer loyalty than the pioneers. As expected, customer loyalty among tariff-mobile customers is lower than among the other two groups.

"Basically: Which statement suits you best?"

Split to:

| BEV (all) | | Pioneers | Early Adopters | | Tariff loyal | Tariff indifferent | Tarif mobile |

I have never considered changing my change my provider

18%

I regularly check, whether there are more suitable offers are available

43%

I think about change occasionally, e.g. in case of price jumps

40%

N = 1,527

N = 578

N = 949

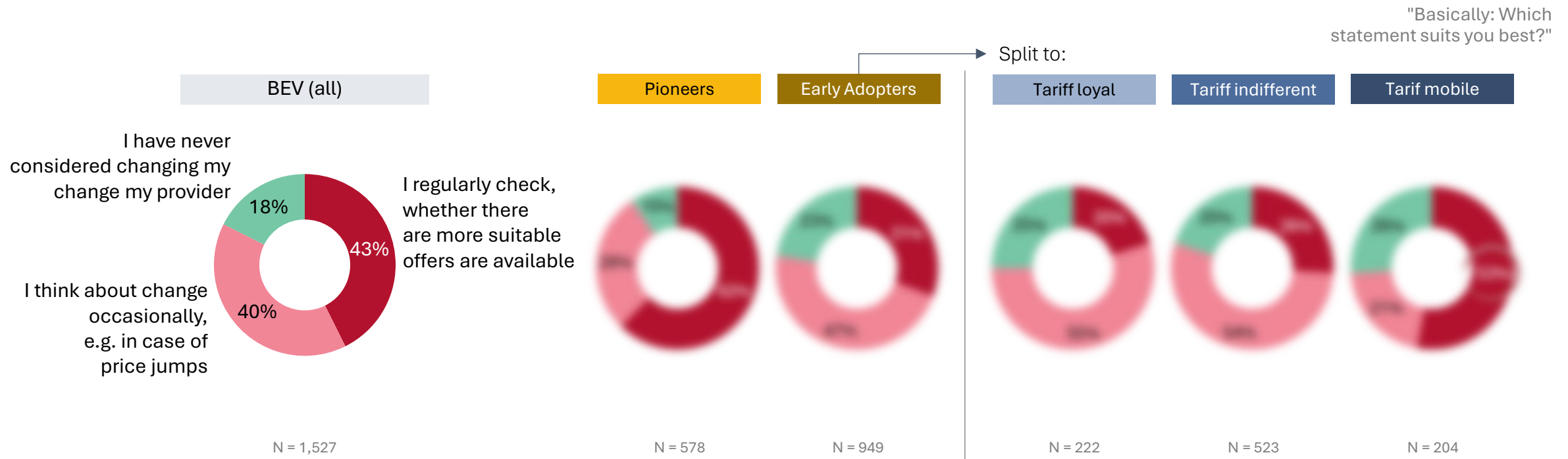N = 222

N = 523

N = 204

Contents

1. Management Summary

2. Living, driving and charging behavior of the target group
    - Segmentation of the target group according to tariff types and price/performance type
    - Demographics, living and driving habits
    - Charging habits

3. Customer loyalty with tariffs
    - Customer journey for tariff selection
    - Relevance of tariff features (KANO analysis)
    - Market shares for tariff/feature combinations (CONJOINT analysis)
    - Satisfaction with charging tariff
    - Disloyalty

4. Deep dive on selected tariff features
    - Variable tariffs
    - Subscription plan with base fee
    - Bonus programs
    - Blocking fees

5. Cross-selling of home and public charging electricity
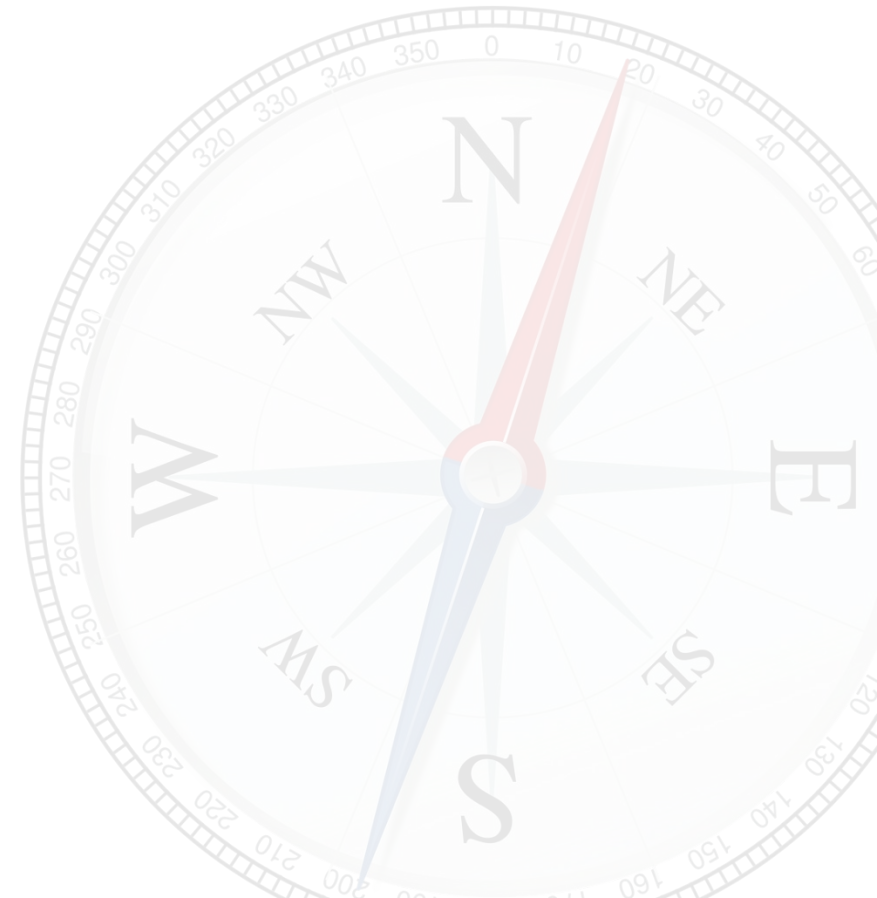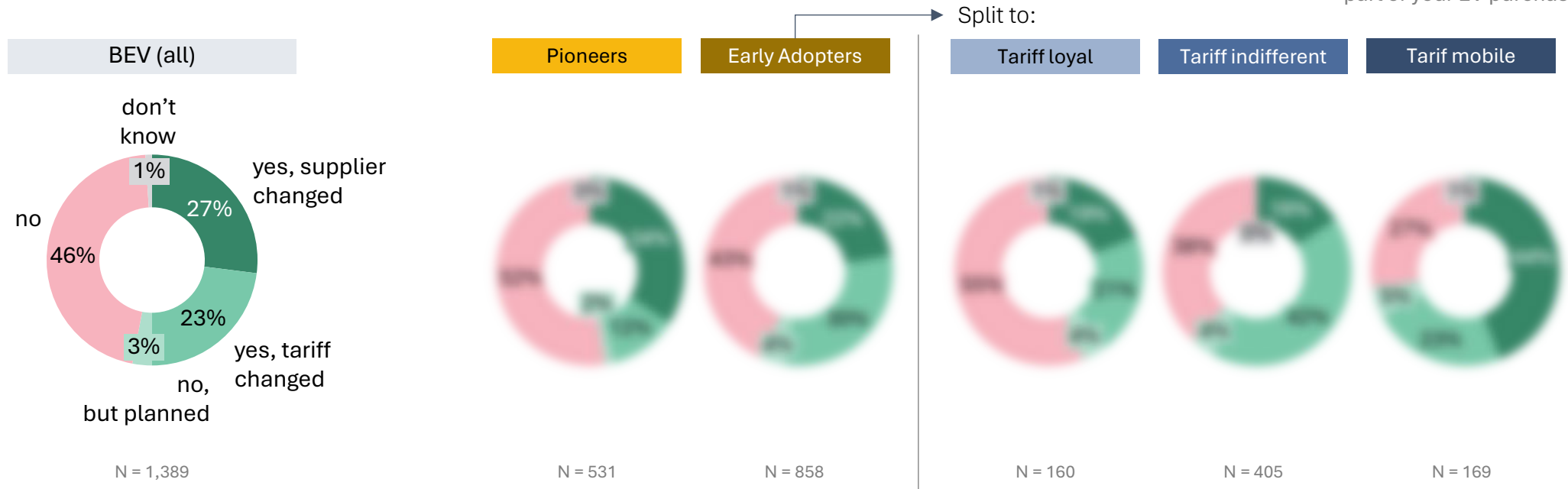
Cross-selling of home and public charging electricity

Change of energy supplier

Erwartungsgemäß gibt es große Unterschiede zwischen den Teilgruppen. Die allermeisten Tarif-mobilen wechselten ihren Versorger oder Tarif im Zusammenhang mit der Anschaffung eines E-Autos, die Tarif-treuen mehrheitlich nicht.

"Have you changed your energy supplier or tariff as part of your EV purchase?"

Split to:

| BEV (all) | | Pioneers | Early Adopters | | Tariff loyal | Tariff indifferent | Tarif mobile |

BEV (all) donut chart:
- don't know 1%
- yes, supplier changed 27%
- yes, tariff changed 23%
- no, but planned 3%
- no 46%

N = 1,389

N = 531

N = 858

N = 160

N = 405

N = 169

USCALE

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