



Charging Tariff & Pricing Study 2025

Customer loyalty and utilization with the right charging tariffs

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USCALE GmbH
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Study findings

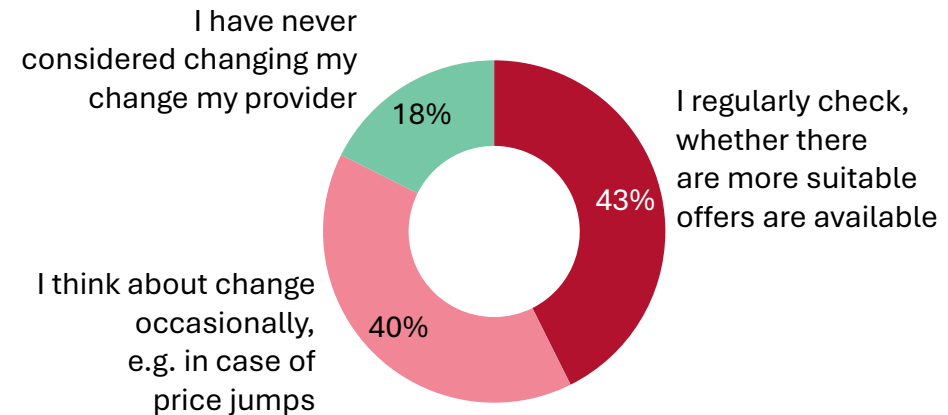
1

High tendency to switch among EV drivers

Over 80% regularly or occasionally consider switching providers.

Early adopters show slightly higher customer loyalty than the pioneers.

Customer loyalty with charging tariffs:



"Basically: Which statement suits you best?"

Study findings

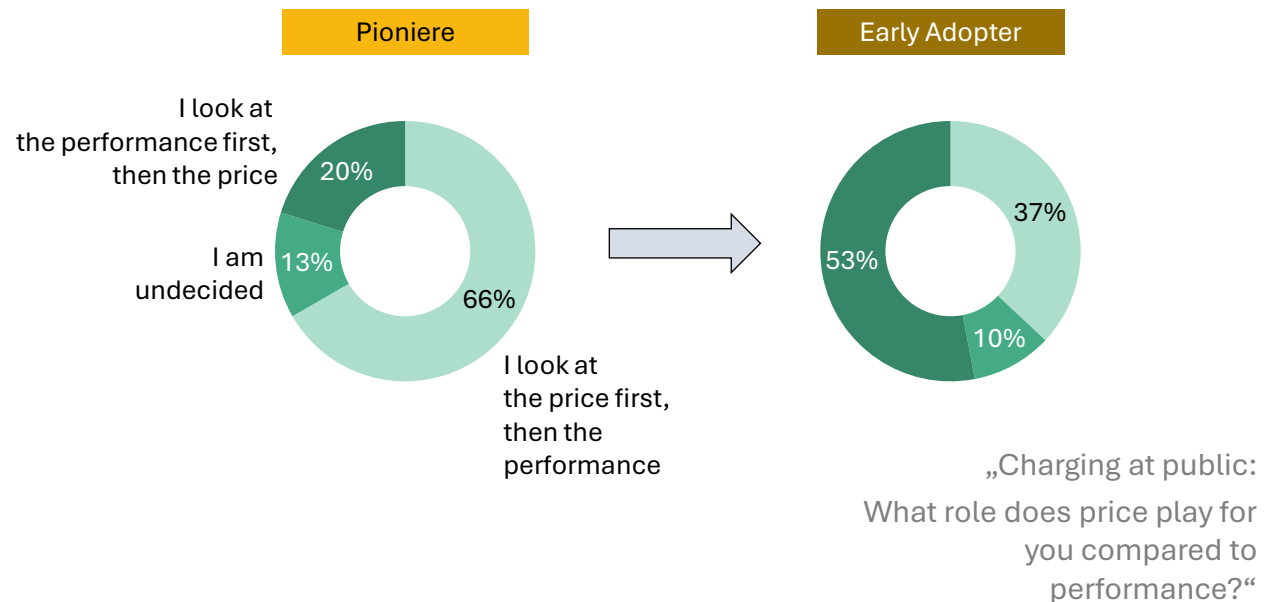
2

Performance currently more important than price

The high public charging prices are the subject of intense discussion in the press. From the perspective of current EV drivers, they are surprisingly less important.

While charging prices play a major role for the pioneers of electromobility, those who have only been driving electrically for a short time, the so-called early adopters, pay less attention to the price.

Relevance of the price compared to the performance of a charging tariff:



Study findings

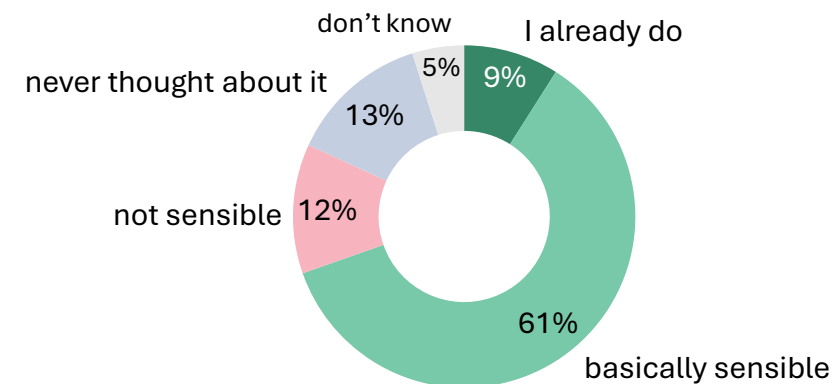
3

Merging domestic and charging electricity

EV drivers are very open to alternative tariff models and structures.

One example: 70% of those surveyed consider a combination of home and charging electricity on the move to be sensible or they already purchase both from the same provider. Of the remaining 30%, 13% are also responsive.

Home and charging power on the move from the same provider?



"What do you think of getting electricity at home and when charging public from the same provider?"

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**.

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?





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