

EV Satisfaction Study 2025

Electric Vehicles in Everyday Life – Experiences from the Users' Perspective

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USCALE GmbH
www.uscale.digital

Management Summary

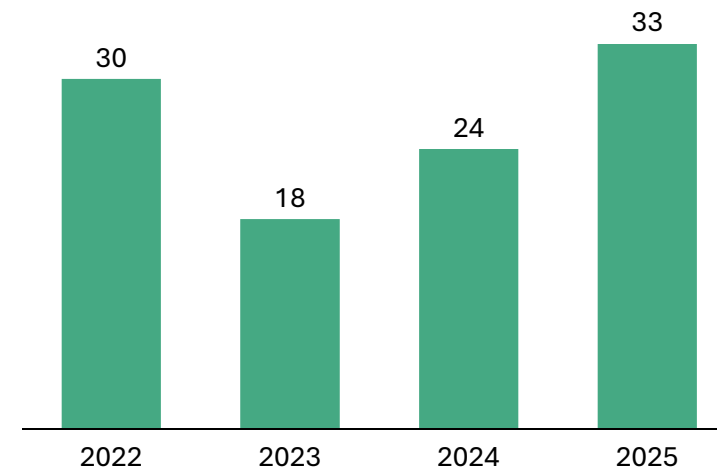
1

Increasing readiness to recommend their EVs

After a decline in 2023, drivers are becoming increasingly satisfied with the overall performance of all vehicles.

Compared to 2024, the so-called Net Promoter Scores, an indicator for the owners' willingness to recommend their EV to a friend, has increased by 9 points.

Net Promoter Scores (NPS values):



NPS-values calculated from responses to "In summary: How likely is it that you would recommend your [brand] to a friend or colleague?"

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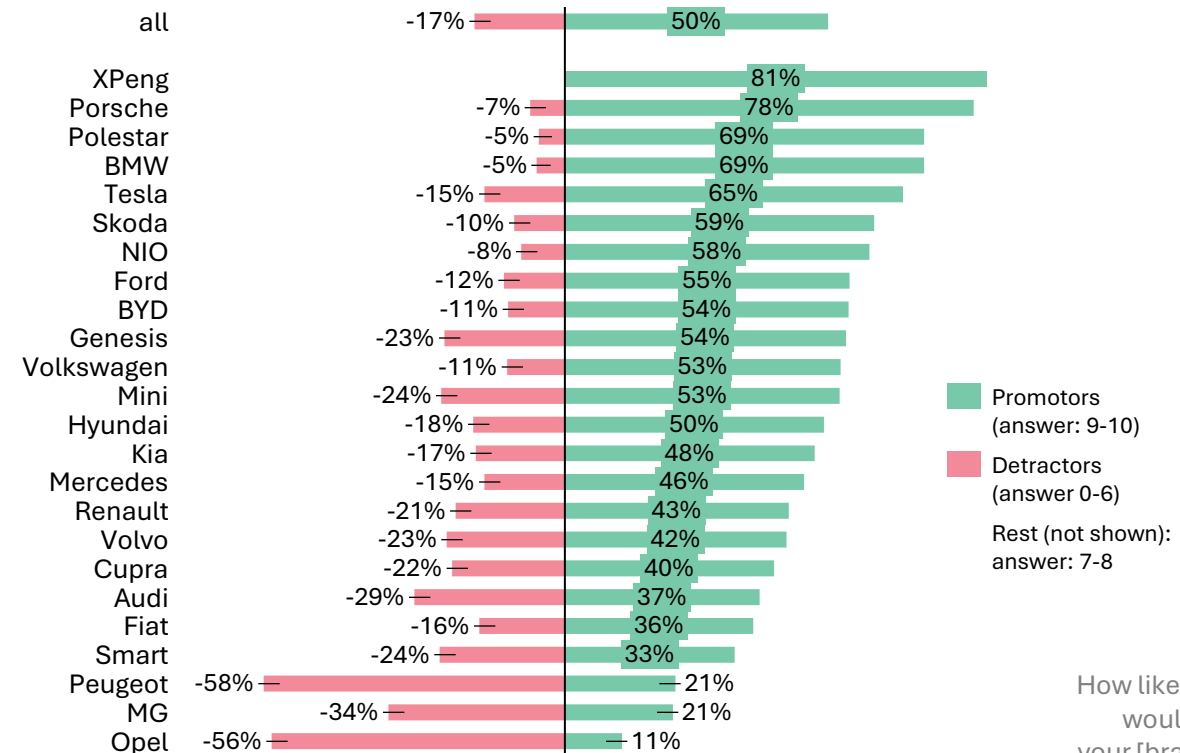
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Hugh spread between recommendation of the brands

However, the performance of the brands varies considerably. Tesla is no longer the number one, with the XPeng taking over followed by Porsche and Polestar. Peugeot, MG and Opel are carrying the red lantern.

Overall, Chinese brands show high performance spread with Xpeng, Polestar and NIO in top ranks, while Smart and MG disappoint.

Promoters and Detractors according to the Net Promoter Score logic:



"In summary:
How likely is it that you
would recommend
your [brand] to a friend
or colleague?"

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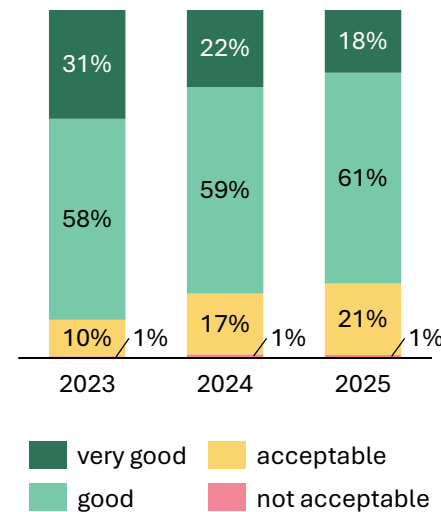
3 Range follows expectation

Expectations are rising: 79% rate a 'real' summer range of 400 km as (very) good. In recent years, this figure was significantly higher.

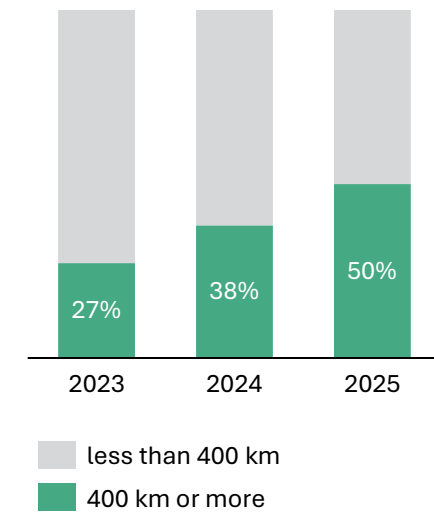
At the same time, actual ranges have improved significantly: Today, 50% of respondents state that they drive an EV with a real summer range of more than 400 km.

'Real' summer range of 400 km:

Expected range



Actual range



„Independent of the charging capacity of your [brand]:
How do you rate a 'real' summer range of 400 km?“

„What is the actual 'real' summer range of your [brand]?“

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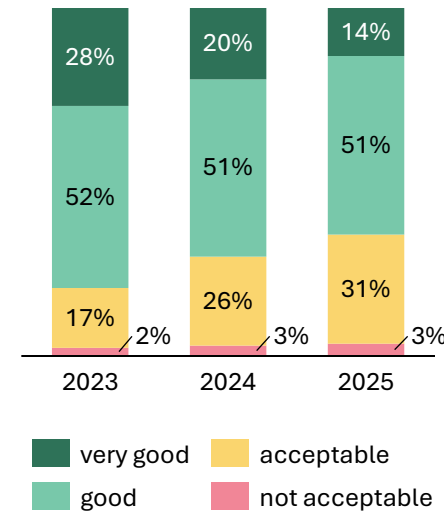
DC charging capacity outperforms expectation

While last year 71% of EV drivers rated a charging capacity of 150 kW as (very) good, this year the figure is only 65%.

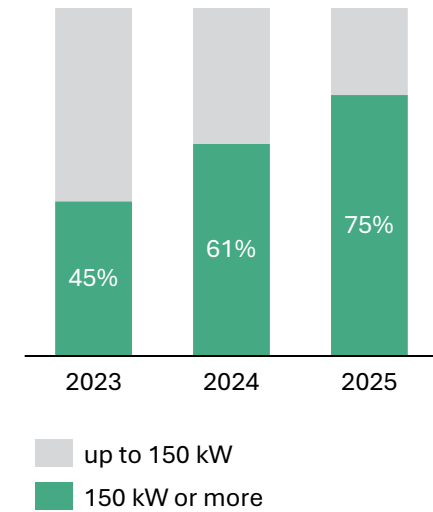
Reality is keeping pace: as charging capacity requirements increase, so do the actual values of EVs: 75% of all respondents say that their EV has a maximum charging capacity of 150 kW or more.

Maximum DC Charging Capacity of 150kW:

Expected charging capacity



Actual capacity



„Independent of the charging capacity of your [brand]:
How do you rate a DC charging capacity of 150kW?“

„What is the actual maximum DC charging capacity of your [brand]?“

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Many recommendations to the brands

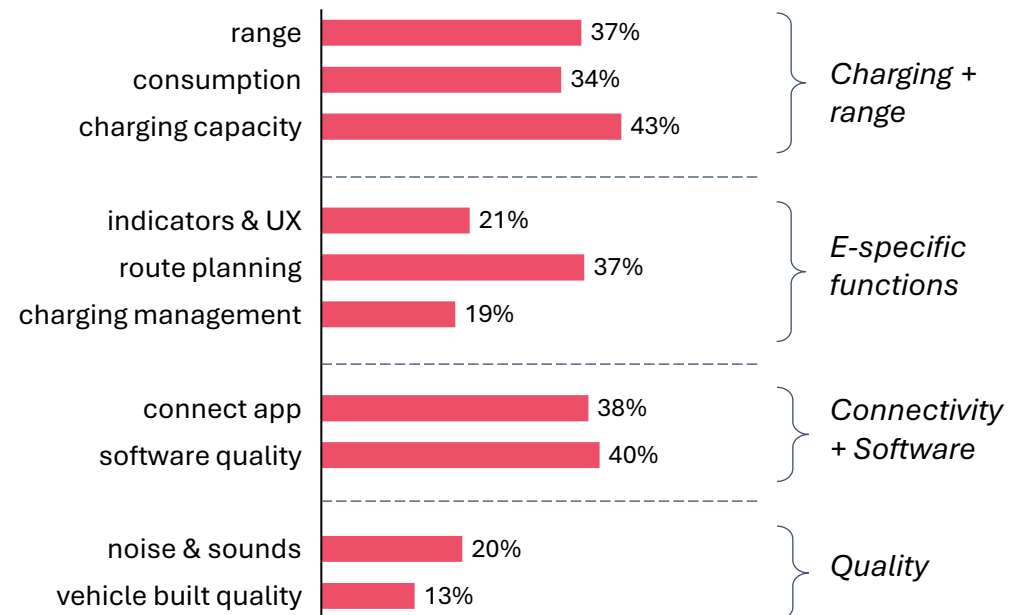
Despite the improvements, there is still much to be done.

In addition to the much-discussed topics of range, consumption and charging speed, there are three areas of focus:

1. EV-specific functions and operation
2. Connectivity and Connect app
3. Quality and acoustics

The actual needs for action vary strongly between brands.

Topics with a particular need for action:



"In summary, what areas do you believe [brand] should prioritise for improvement?"

Objective

Initial Situation:

- Compared to combustion engines, which have been optimised for over 100 years, battery electric vehicles are still at the beginning of their technical development.
- In order to compete successfully, manufacturers need detailed and systematic customer feedback as early as possible.

Objectives:

- What new use cases are resulting from the electric drive? What are the resulting requirements?
- Which e-specific features are particularly relevant and how do they need to be designed?
- How do EV drivers evaluate the concepts? What are the strengths and weaknesses of the various brands?
- What recommendations do users have for their EVs manufacturers?



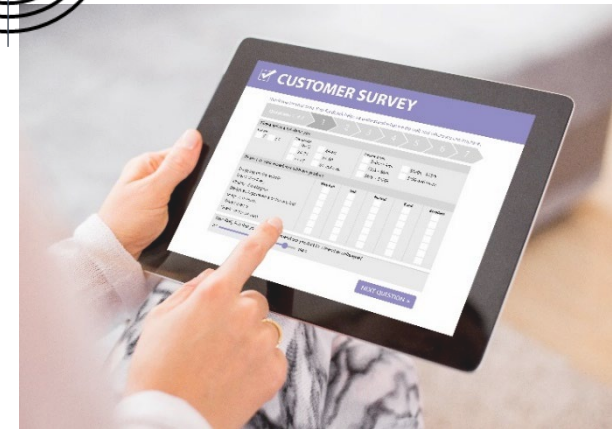
Target Group

Survey:

- Target Group: Owners of fully battery-electric vehicles (no Plug-in Hybrids)
- Survey: Online-Survey (CAWI)
- Market: DACH
- Recruiting: Social Media
- Length of Interview: 15 - 20 min
- Field phase: May - June 2025

Sample size:

- Total sample size: N = 5.004



EV-specific Use Cases and Features

Driving



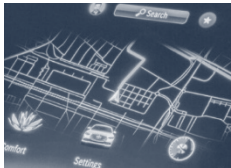
- Range
- Eco-modes
- Regenerative braking
- Driving and functional noises

Display and operating concept



- Range indicator
- Charging indicator
- Energy Monitor
- Other displays in the cockpit

Navigation System



- Functions used
- Usage habits
- Problems
- Recommendations

Connect app



- Functions used
- Usage habits
- Problems
- Recommendations

Charge management



- Route Planning, thermal mgmt.
- Charging settings, charging capacity
- Charge mgmt., charging problems
- Accommodation of charging cable, position of charging port

Heating and air conditioning



- Pre-conditioning, heating, air conditioning
- Usage behaviour
- Problems
- Recommendations

Survey Structure

EV Owners were asked about EV-specific features according to...

Usage habits	"How often do you use ...?" "Which of the following functions do you use...?"
Problems	"Have you already had problems with ...?" "What kind of problems have you had?"
Concept maturity	"How mature are the technical concepts of your [brand] regarding ...?"
Recommendations to manufacturers	"Do you have any recommendations to [your brand] on ...?"





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