

EXCERPT

(from a total of 130 pages)

CPO/eMSP Charging Services Study 2025

CPO and eMSP services from the user's perspective



Objective

Initial situation:

- Charging services not only provide revenue streams for providers, but are also an important tool for customer retention. This requires EV drivers to actively use the services and, above all, to prefer them.
- The large number of eMSP and CPO offerings is leading to fierce competition in a rapidly growing market where brands are becoming more important for differentiation.

Questions:

- Which eMSP or CPO offerings are actively used by EV drivers and which are preferred? What are the market shares of the most important providers (groups)? What trends are emerging over time?
- How are eMSP and CPO brands perceived?
- How do EV drivers decide on their preferred charging service?
- What are the differences between the various target groups?



Target group

Survey:

- Target group: Owners of fully battery-powered electric vehicles (no plug-in hybrids) who charge publicly
- Survey: Online survey (CAWI)
- Market: Germany
- Recruitment: Social media, access panel
- Duration of interview: 15-20 minutes
- Field phase: July/August 2025

Sample:

- Total: N = 2,210
- Of which:
 - Social media: N = 773 (35%)
 - Access panel: N = 1,437 (65%)



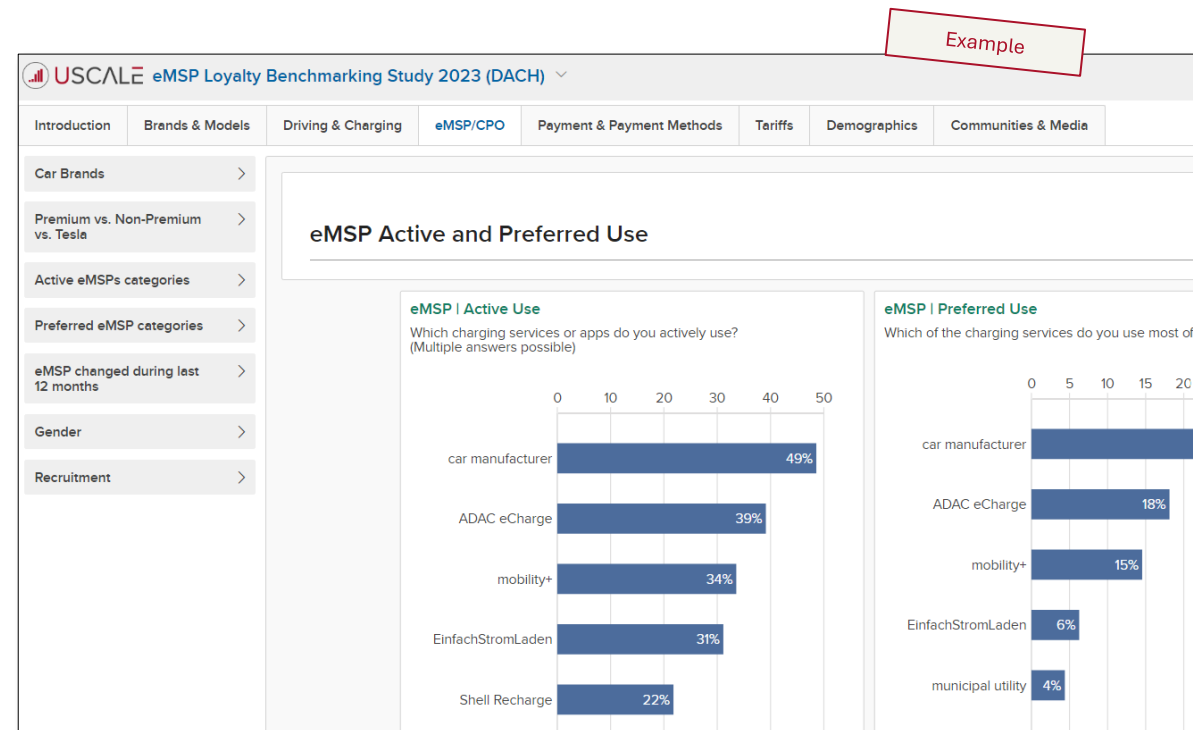
Dashboard for individual analyses

Deep dives into individual subgroups

Only selected splits are shown in this document.

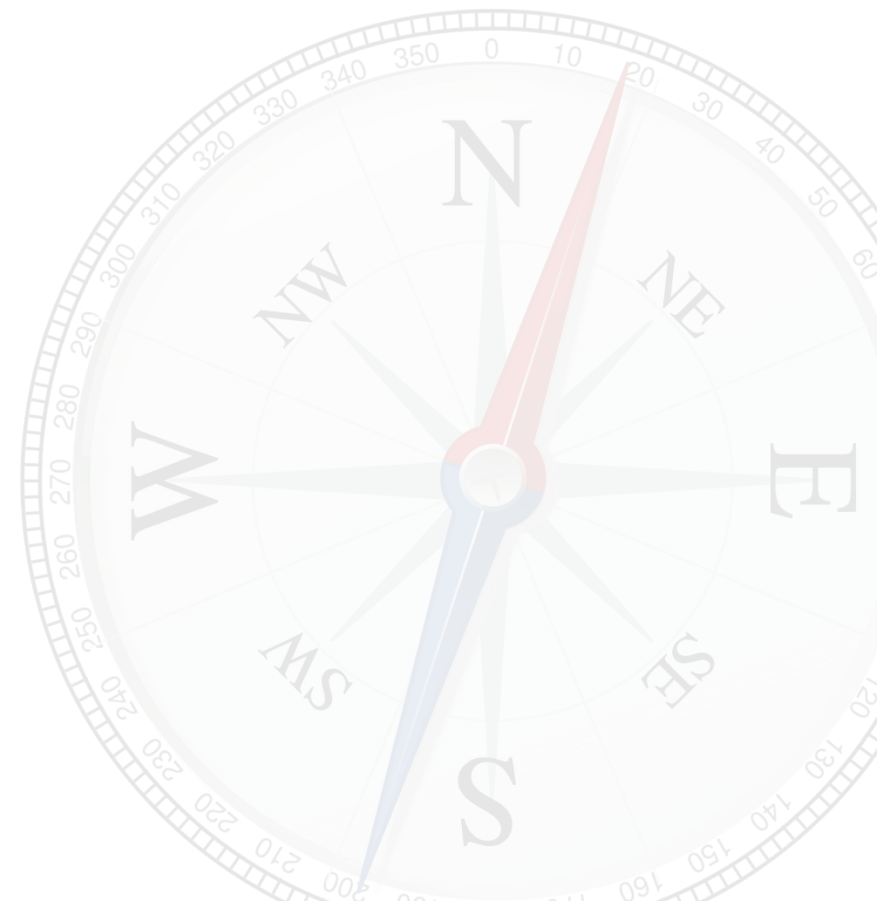
The associated dashboard allows splits according to any other variables.

To register, please contact your USCALE representative.



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- Mit dem Einstieg neuer Teams in die 2. Phase wird auch der Anteil der öffentlich- und der Anteil der öffentlich-privaten Partnerschaften. Damit kommt die Förderung und Bedeutung von ÖPNV- und ÖPNV-Partnerschaften zu.
- Die Partner informieren sich intensiv über die Angebote der Landesverkehrs **Service-Plattform** als Informationsquelle über die Förderung nach **Verfahrensgesamtheit** werden dafür wichtige Aufgaben ihrer Partnerinnen in der **Partnerschaftsarbeit** von Anfang an auch bei den Verhandlungen sein.
- Die Anzahl der aktiv gesteuerten Partnerschaften ist weiterhin hoch. Trotzdem gibt es mit der Einleitung einer Phase zur bewussten Nutzung eines Anbieters in einer Situation. Die **Partnerschaft** mit dem bewussten Anbieter steigt an.
- Die Unterschiede in der Performance der Anbieter sind groß
 - **Spezialanbieter** können sowohl in einer als auch mehreren Nutzungskategorien zu. Die Leistungen in einer Kategorie werden die anderen Anbieter in der Marke. Außerdem werden die bei den Verhandlungen werden die Angebote der Spezialanbieter noch häufiger genutzt.
 - Die Gruppe der **Verfahrensgesamtheit** unter einer Berücksichtigung der Team-Partnerinnen deutlich zu. Partnerinnen. Die Unterschiede der Angebote sind von ÖPNV-angehörigen. Die bei öffentlichen Nutzung der nicht vergrößert.
 - **Neue ÖPNV** unter einer Berücksichtigung der Team-Partnerinnen des Partners.
 - **Endkunden** werden in der Marke. können aber aufgrund der Leistungen der **Verfahrensgesamtheit** unter geringen Kosten unter der Nutzung können sie weiterhin zu. **Neue** unter sich als ÖPNV von ÖPNV unter sich.
- Die Marke für den **Teil-Partner-Service** einer Formate für die Weiterentwicklung der Partnerschaft, und für die öffentlichen Partnerschaften in Branchenangeboten effektiv gering. Die Gesamtschwerlast der Marke ist also weiterhin.
- Die mit großen Kosten **erweiterten Anbieter** für die **Partnerschaft** und die **Leistungsleistung** gering von der ÖPNV-Partnerschaft. Es ist mit großen Kosten sogar Partnerinnen von Partnerschaften. Teilnehmende oder Partnerschaften der **Teil-Teil**.

Management Summary

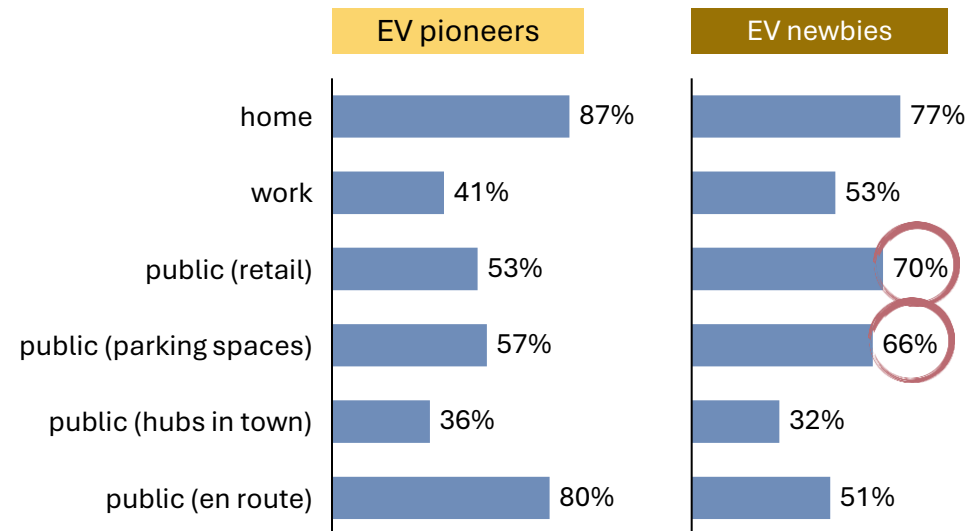
1

Public charging continues to gain importance

New EV owners who charge publicly use public charging infrastructure more frequently than EV pioneers.

As EV adoption increases, the utilisation of public charging stations is growing disproportionately.

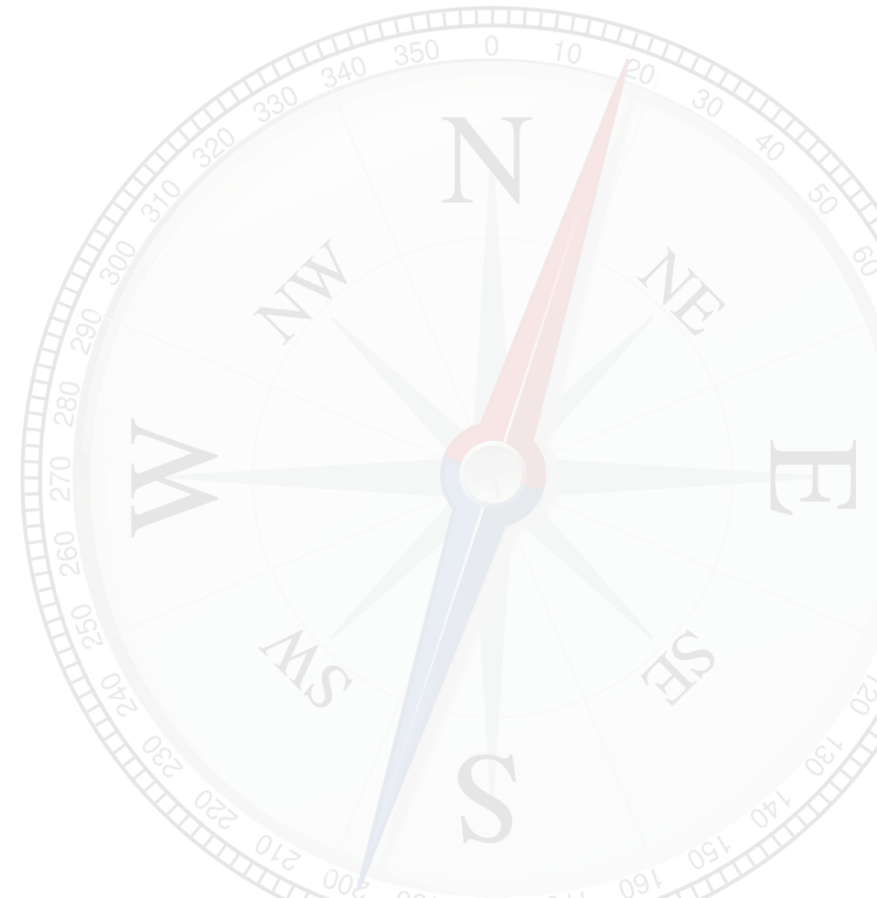
Charging locations used:



"Where do you charge your electric car?"
(Multiple answers possible)

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Segmentation of the target group

Three EV adopter segments

To identify trends, this study differentiates between three adopter segments.

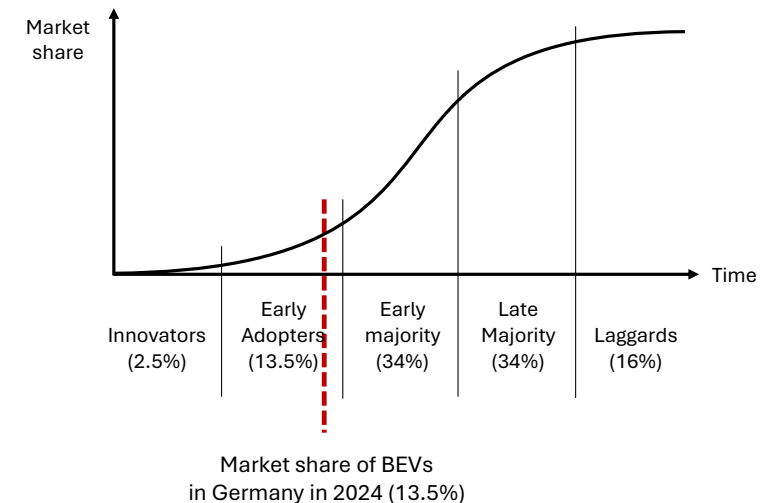
Background to segmentation:

- The best-known model for the ramp-up of innovations segments adopters according to the time of switchover (figure). It assumes (simplistically) that the time of switchover correlates with motivation. (Criticism: many EV enthusiasts switch over later due to the often long car ownership periods).
- This study therefore distinguishes between when respondents registered their first A-car. This results in three segments:

EV Pioneers	EV Regulars	EV Newbies
> 3 years experience	2 to 3 years of experience	< 2 years experience

If the results differ, this indicates a trend.

Segments in the ramp-up of electric mobility*:



* The classification shown is based on Everett Rogers' diffusion model ([LINK](#)).

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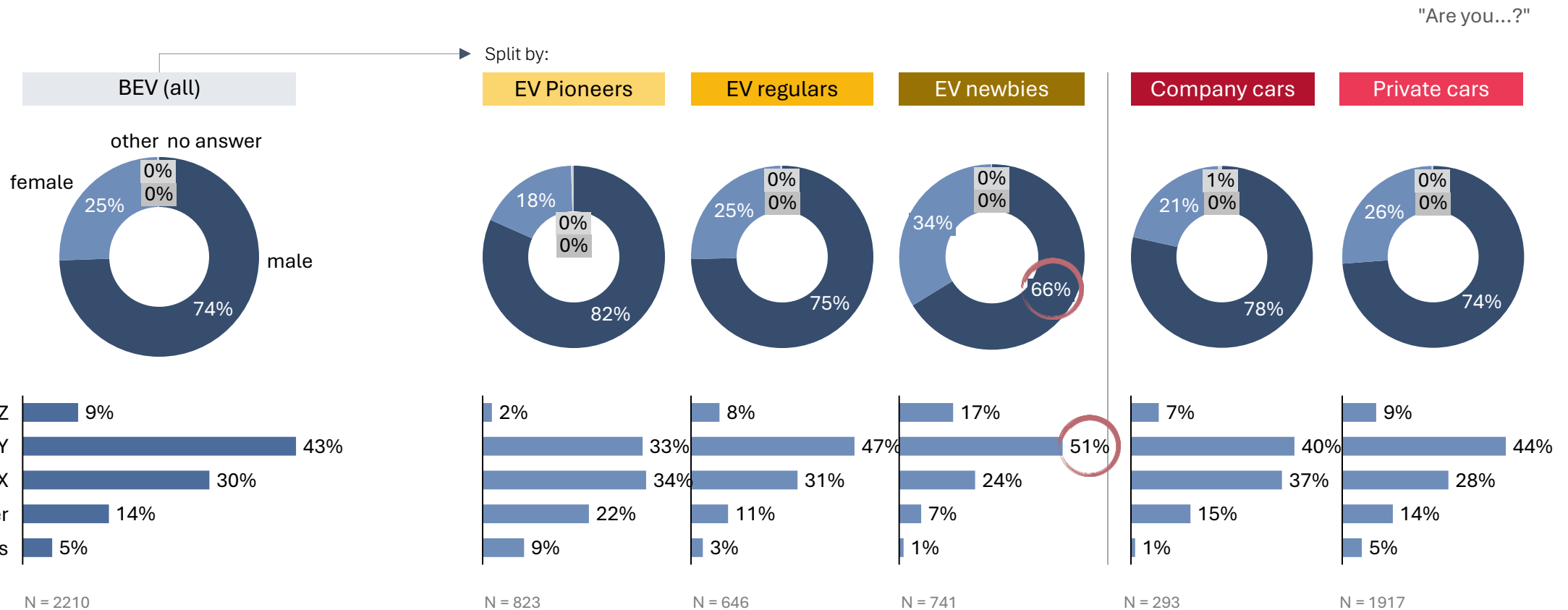
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Demographics, living and driving habits

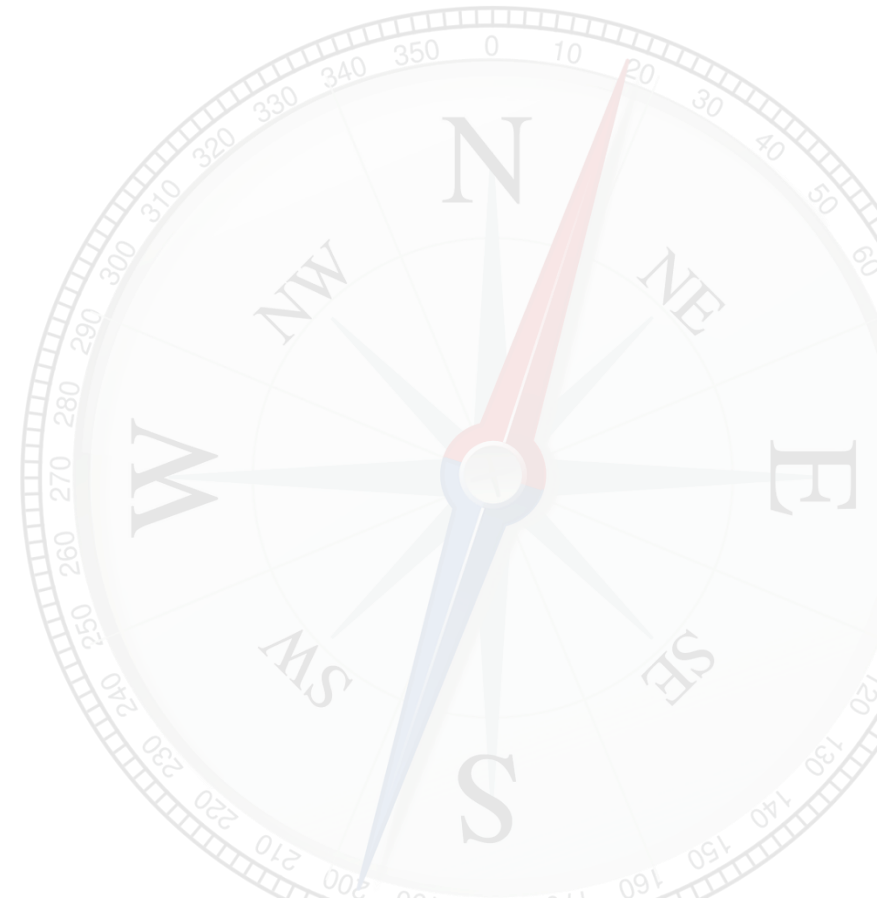
Gender and age

The vast majority of study participants are male and belong to Generation X. Early adopters are younger and more likely to be female.



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Preliminary remark

To be successful in the charging services market, providers must score points in two areas:

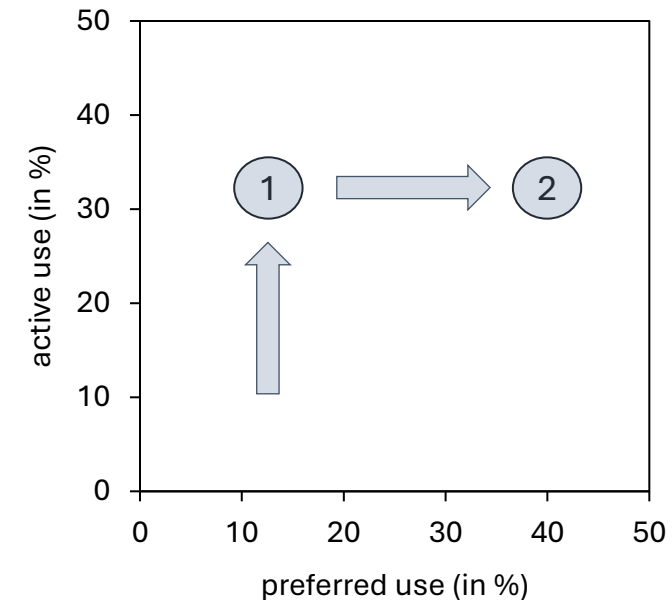
- 1 KPI: Active usage**

Apart from ad hoc charging, EV drivers can only use services with which they are registered.

Providers must therefore ensure that they are actually being used, i.e. that EV drivers have a contract with them and use them at least occasionally.
- 2 KPI: Preferred use**

Charging services are usage-based business models. A contract alone is therefore not sufficient.

For success, it is important that EV drivers use a service not only occasionally, but preferentially.



Preliminary remark on CPO/eMSP clustering

To facilitate the analysis of the market share of CPO and eMSP services, providers are segmented into groups.

The following classification is used in this analysis:

1. Energy suppliers*: E.ON Drive, EWE Go, mobility+ (EnBW), Maingau Autostrom, InCharge (Vattenfall), Lichtblick
2. Oil companies: Aral pulse (including ADAC eCharge), Shell Recharge, TotalEnergies
3. Pure CPOs*: IONITY, Fastned, Tesla
4. Roaming providers: Plugsurfing, Chargemap, NextCharge, ChargePoint, Elli
5. OEM services: all services offered by EV brands
6. Municipal utilities: all municipal utilities, eCharge+, ladenetz.de, Ladeverbund plus, Tank-E-Netz
7. Employers
8. Retail
9. Others: Moovility, PlugShare, NextCharge, leasing services (e.g. Sixt), others



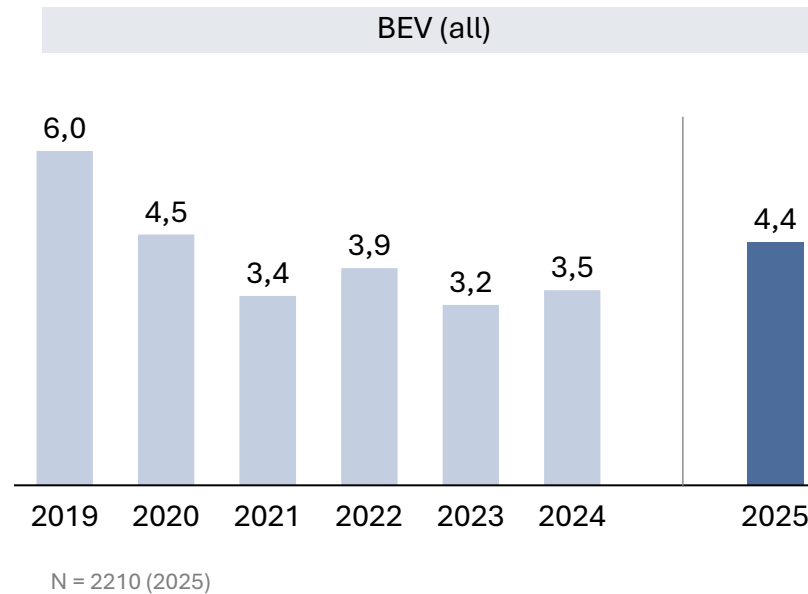
In contrast to previous study years, Tesla was added to the pure CPO offerings for all respondents.

* Although many energy suppliers also offer charging electricity as CPOs, we have grouped them under "Energy suppliers". Providers that only offer charging electricity as CPOs are grouped under "Pure CPOs".

CPO/eMSP of Choice

Actively used eMSPs

EV drivers still actively use multiple charging services. The data from 2024 is not comparable with data from previous years. As EV adoption increases, the number of actively used services decreases.



The apparent increase is due to the change in the presentation of charging services (app logos instead of a text list). The values are therefore not comparable with the previous year's results.

"Which charging services or apps do you actively use?"
(Multiple answers possible)

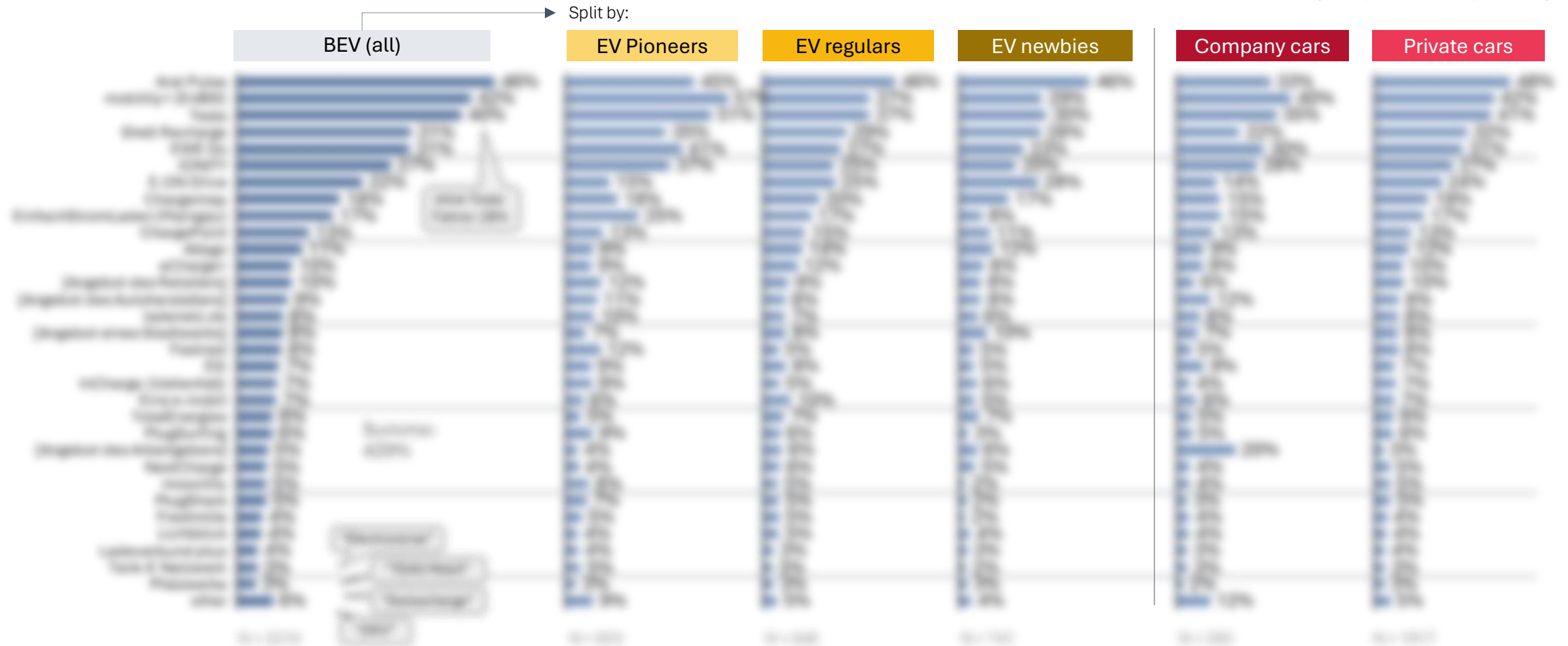
Actively used providers

Actively used charging service providers

EnBW, Tesla, IONITY, EWE Go und Plugsur verlierten mit zunehmender EV-Adaption. So kommt ARAO, pulser auf Platz 1 der aktiv genutzten Services und auch E.ON steigt auf. Shell bleibt konstant.

"Which charging services do you actively use?"

(Multiple answers possible)



Usage situations

Providers = used:

(Multiple answers possible)

BEV (all)

Private cars

Actively used providers

Recommendation of charging service providers (NPS question)

The consistently critical NPS values (difference between promoters and detractors) show that virtually all providers have a clear need to improve their performance.

Note:
NPS scores depend on the industry.

Providers = used:

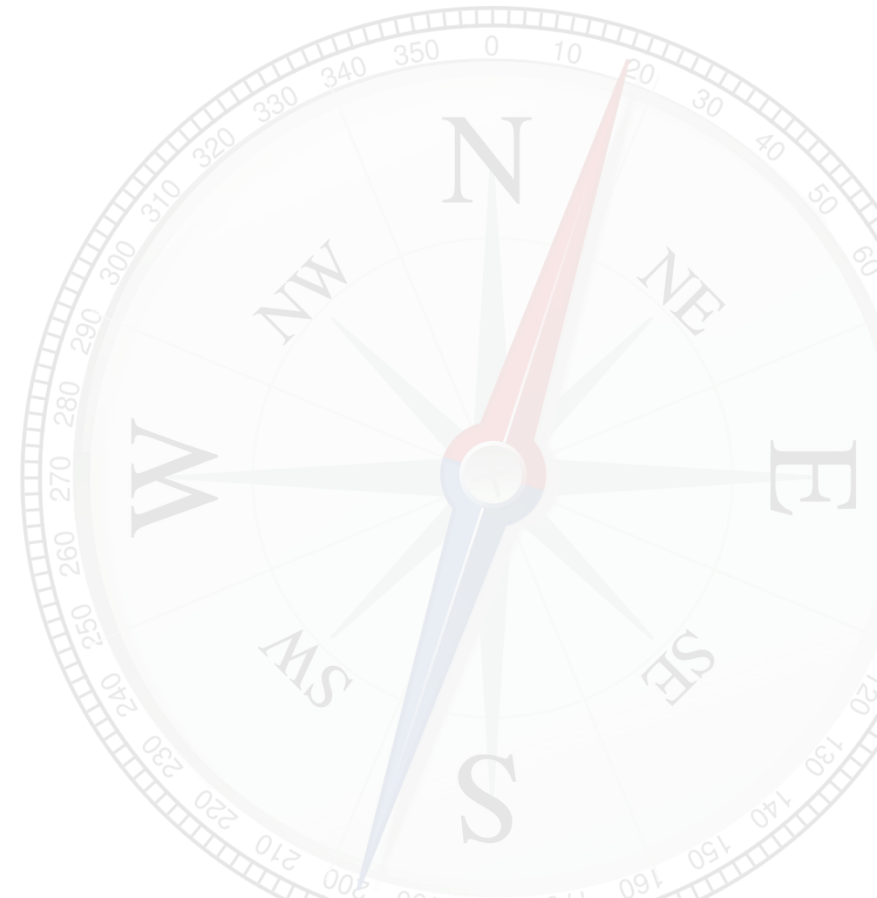
"How likely are you to recommend the following charging services to a friend or colleague?"



N = 2210

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Active vs. preferred use

Charging service market shares by customer segment

(Special: excluding Tesla drivers)

Welche dieser Lade-Netzwerke werden Sie am liebsten nutzen? Welche Lade-Netzwerke werden Sie am liebsten nicht nutzen? (Bitte angeben, ob Sie das Lade-Netzwerk in der Vergangenheit oder in der Zukunft nutzen möchten)

"Which charging services or apps do you actively use?"

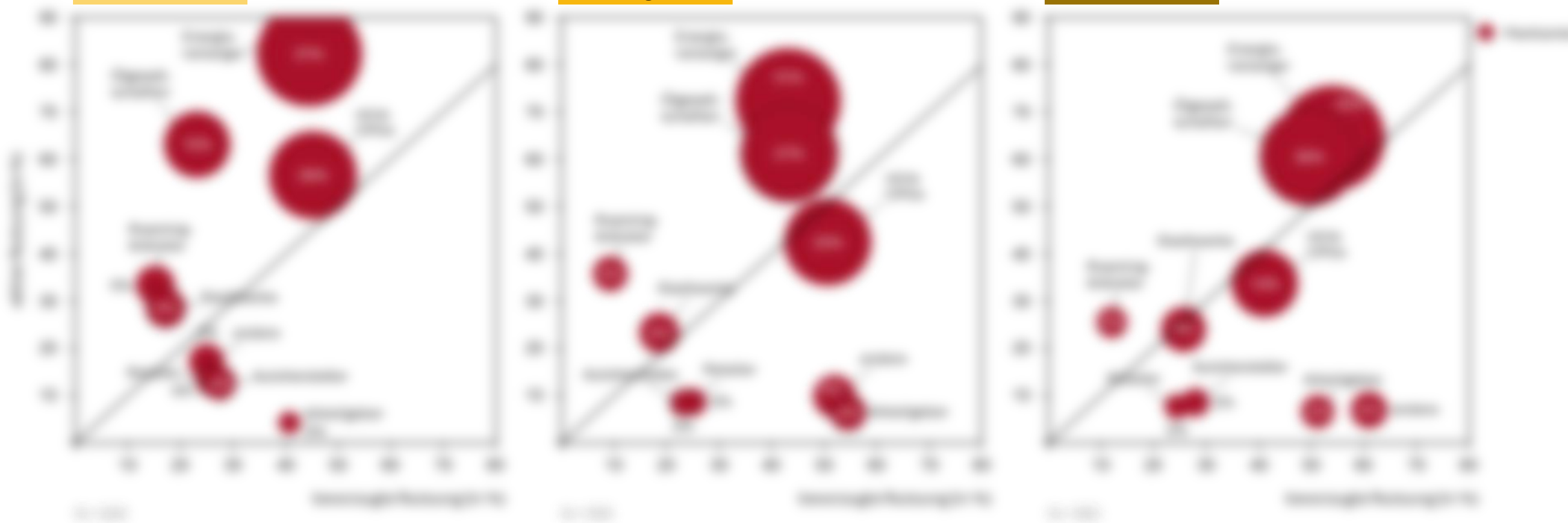
vs

"...preferred?"

EV Pioneers

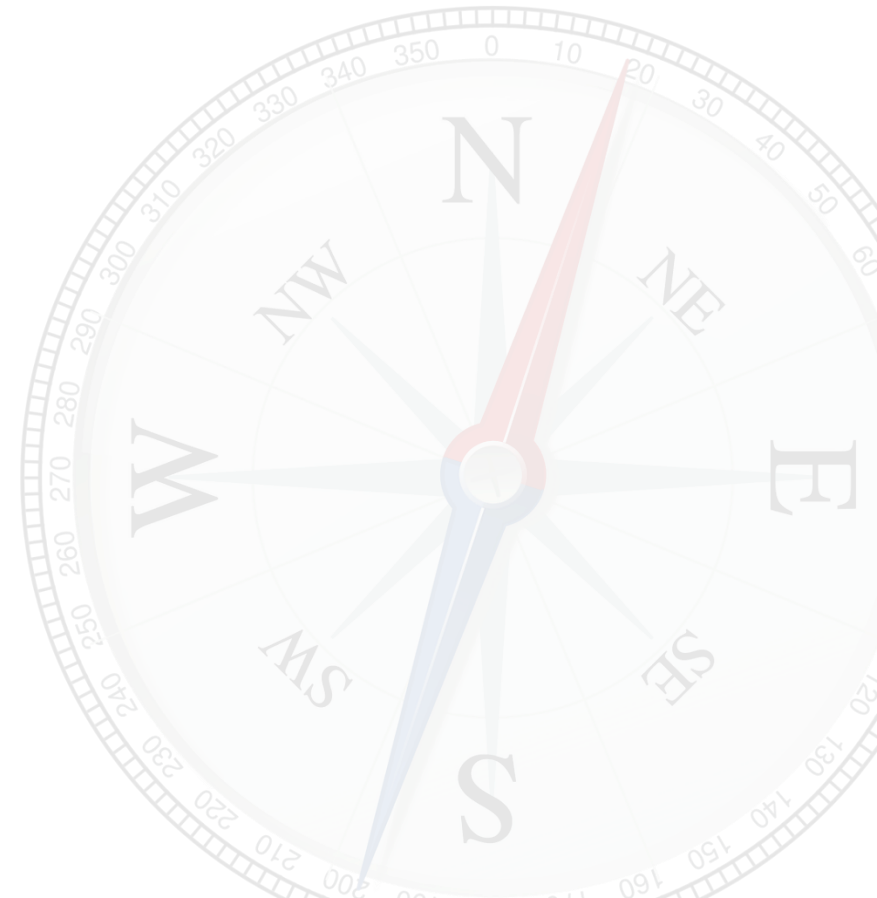
EV Regulars

EV Newbies



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Reasons for preference

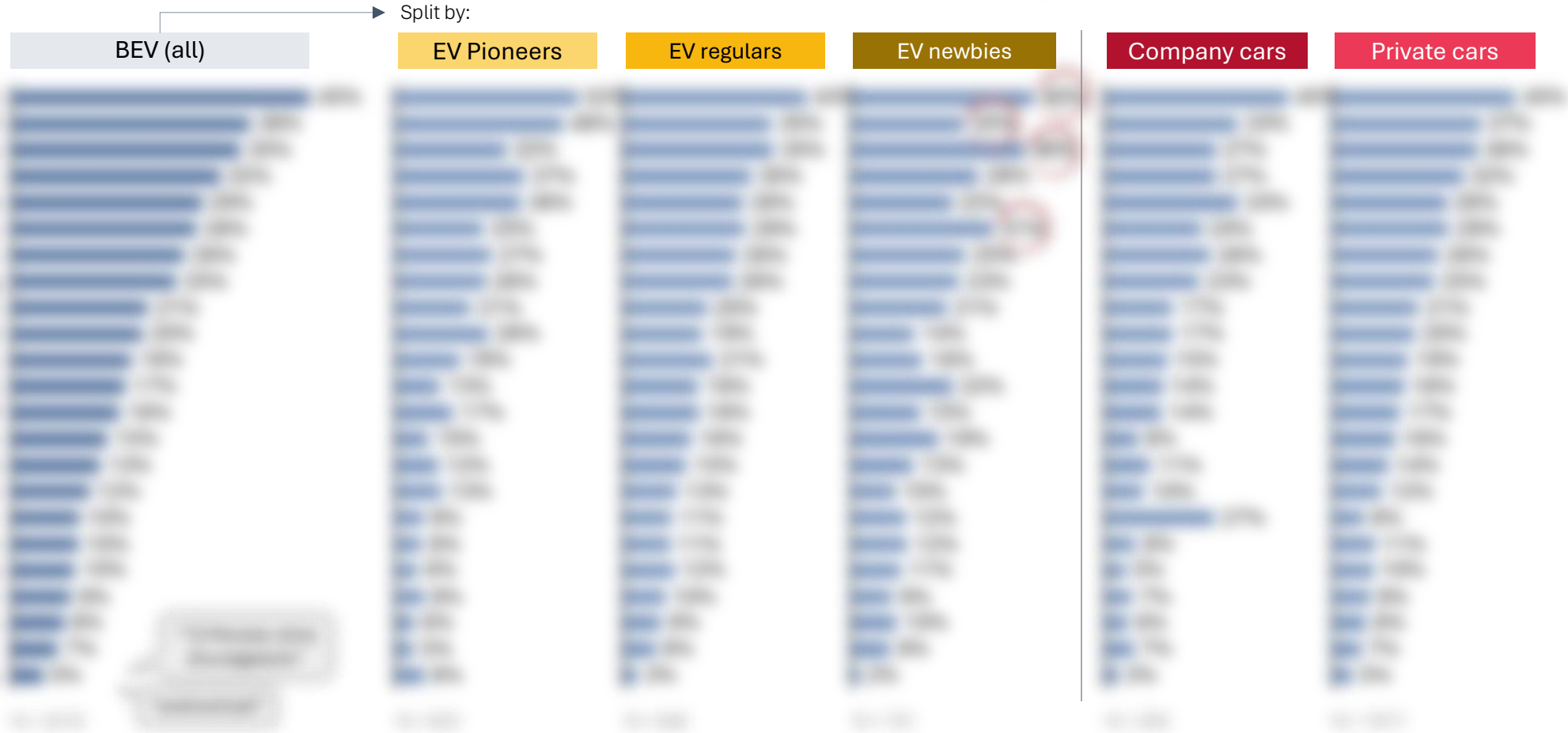
Reasons for preference

Provider = used:

"What are the reasons why you prefer to use [preferred charging service]?"

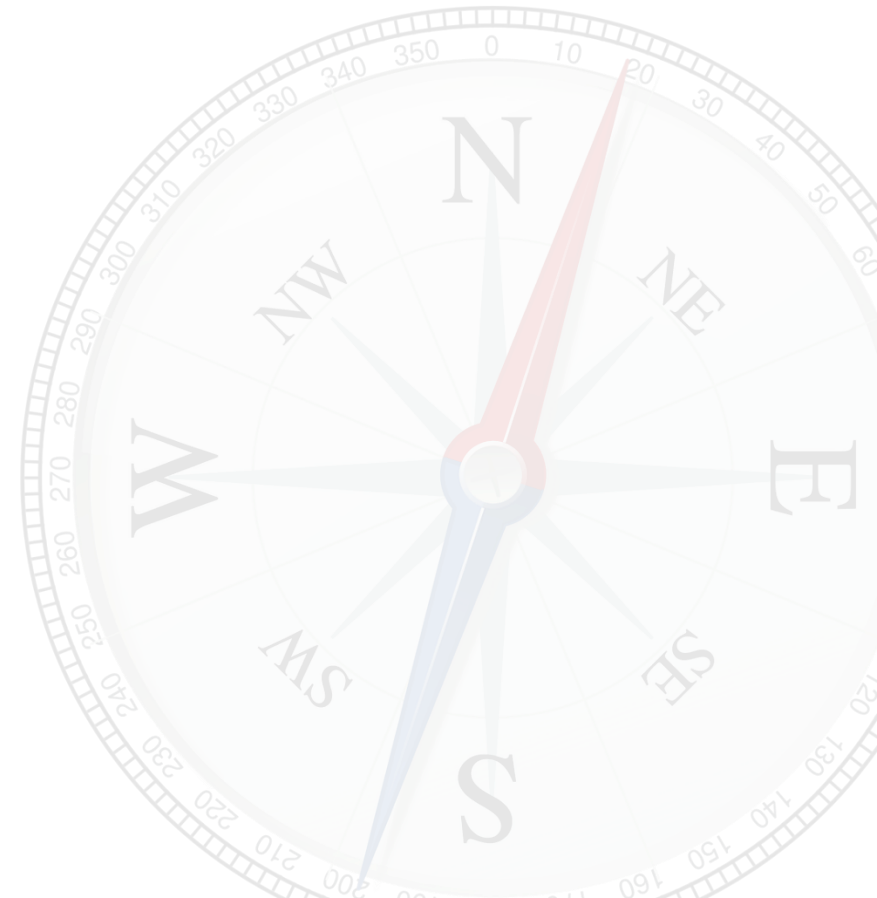
(Multiple answers possible)

CPO/eMSP Charging Services Study 2025



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Conjoint analysis

(Introduction to the method)


The conjoint method depicts tariff selection as a compromise decision.

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

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


Each offer consisted of a combination of several features that were compiled by an algorithm. The survey thus provided thousands of individual evaluations, which were analysed using multivariate analysis.

Example



(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



Ladeleistung **50 kW**


Direkt **keiner**
auf
Ihrem
Weg

Angebote **Supermarkt**

Ladesäulen- **anderer CPO**
Betreiber **(Roaming bzw. Ad-hoc)**

Location **normaler**
Sicherheitsstandard

Möglichkeit 2



Ladeleistung **150 kW**


Direkt **keiner**
auf
Ihrem
Weg

Angebote **keine**

Ladesäulen- **dein präferierter**
Betreiber **CPO (mit Ladevertrag)**

Location **normaler**
Sicherheitsstandard

Möglichkeit 3



Ladeleistung **300kW**

Direkt **2km Umweg**
auf
Ihrem
Weg

Angebote **Fachhandel**

Ladesäulen- **anderer CPO**
Betreiber **(Roaming bzw. Ad-hoc)**

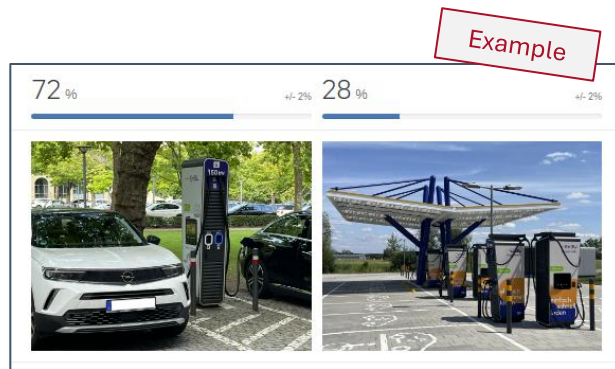
Location **hell beleuchtet +**
Kamera

CPO/eMSP selection decision (CONJOINT analysis)

Conjoint analysis

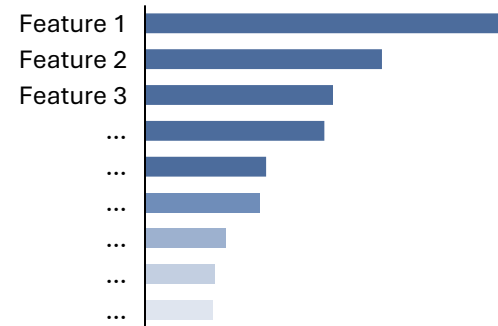
(Sample results)

Simulation of user preferences



For the simulation, the market potential (using the rule of three) is estimated in comparison to its alternatives.

Importance of characteristics



Calculation of partial utility values for each individual feature. The sum of all partial utility values is 100%.

Partial utility of characteristics



Calculation of relative preferences for individual characteristics by normalising the average partial utility to the mean value of the characteristic.

CPO/eMSP selection decision (CONJOINT analysis)

Conjoint analysis

(Instructions for the simulation tool*)

Calculation of the market potential of various charging offers

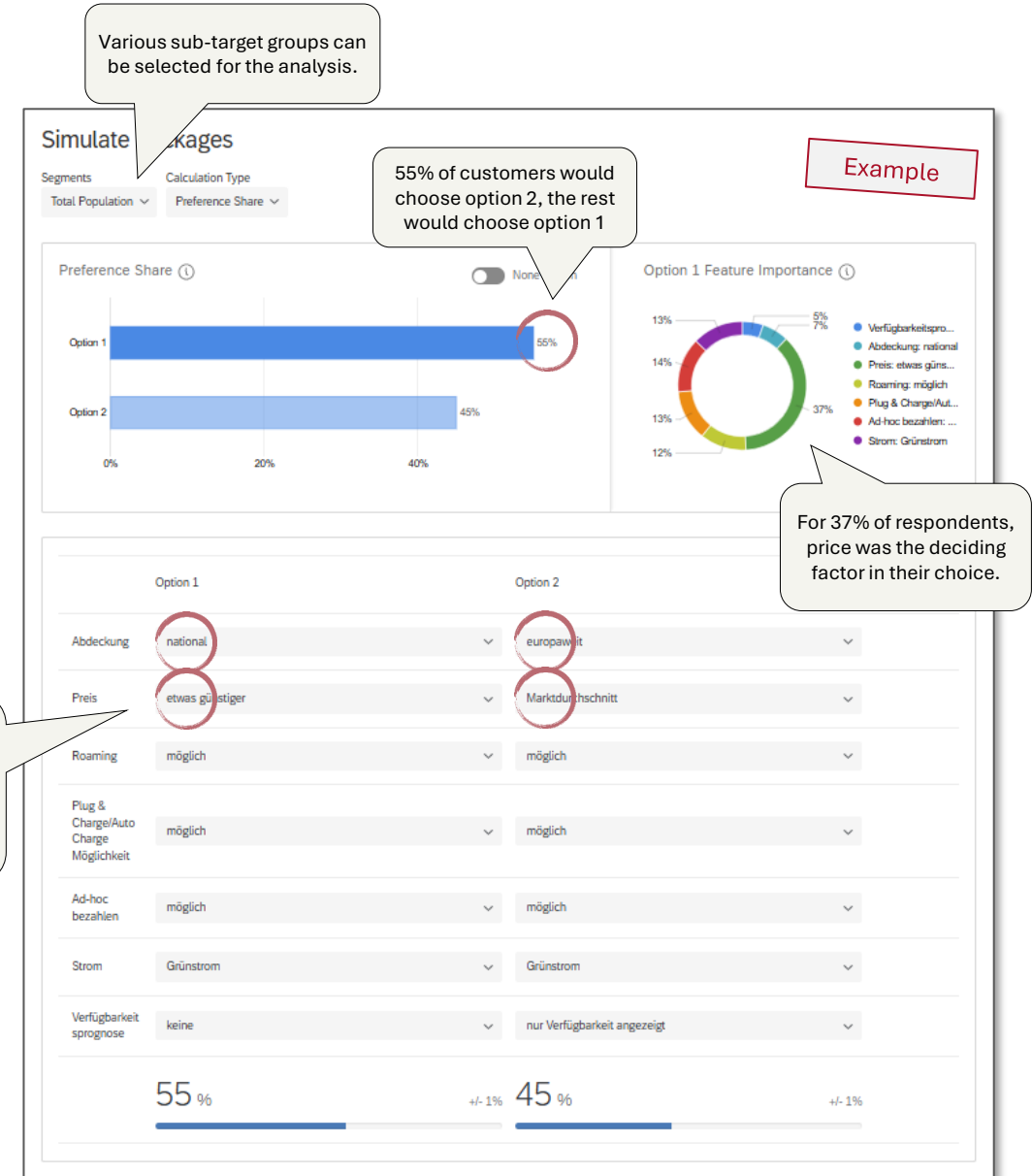
The potential market position of a product depends on the variety and attractiveness of competing offers. The market potential of an offer can therefore only be estimated in relation to its alternatives.

Since the variety of feature combinations and target groups is very large, the market potential is calculated in a simulation tool based on all the features surveyed.



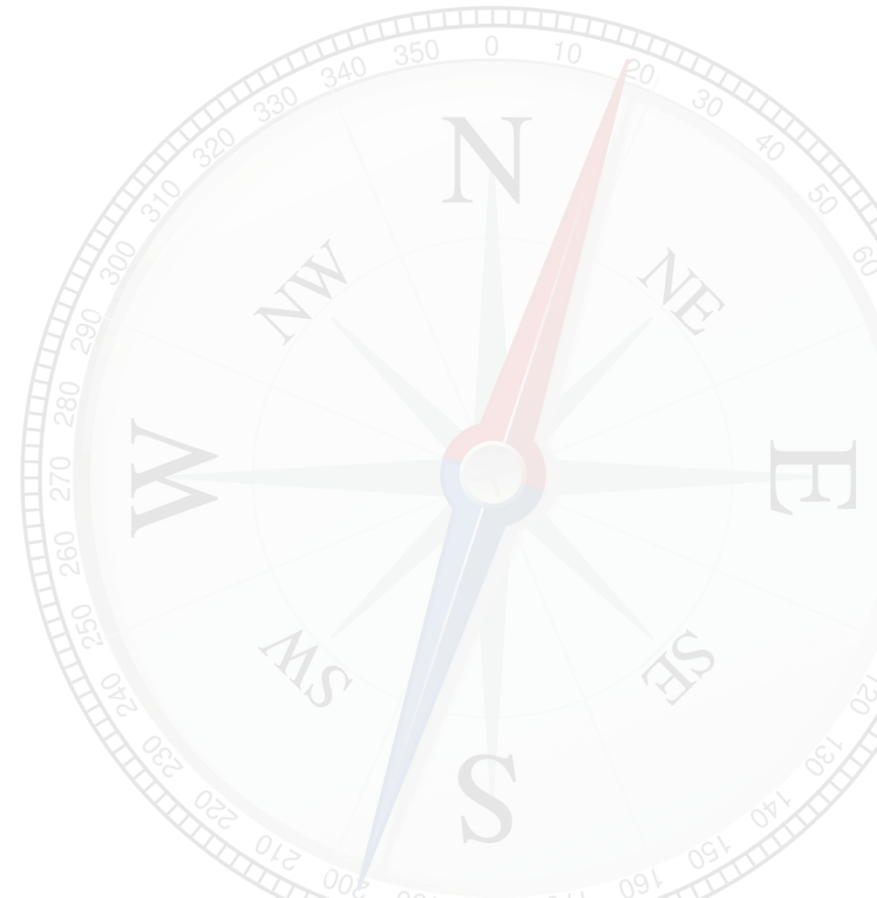
[LINK to the simulator](#)

* The simulation tool will be available until at least 25 December.



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Reasons for actual disloyalty

I switched because [preferred charging service]..."

(Multiple answers possible)

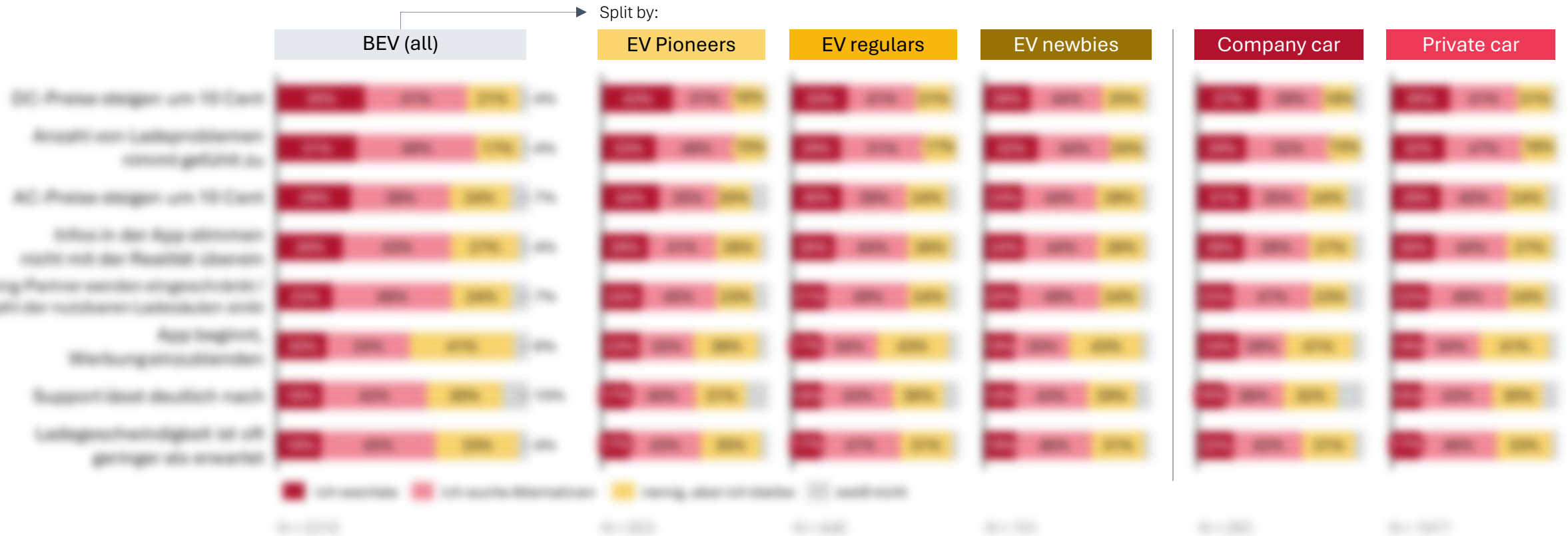


CPO/eMSP loyalty

Moments of Truth

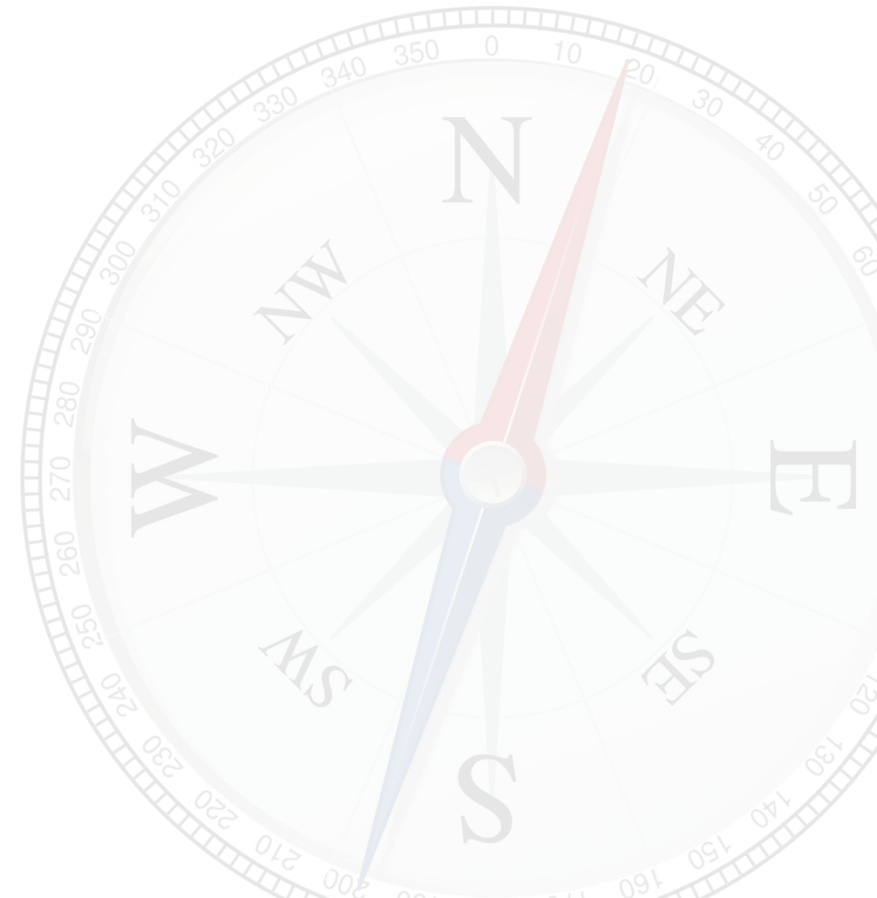
Alle abgefragten Moments of Truth schaden der Kundenbindung deutlich – allerdings mit unterschiedlichem Impact. Die Preissensibilität nimmt mit der EV-Adoption (steilzeit) ab. Überraschend: Dienstwagenfahrer zeigen eine hohe Preissensibilität.

"How would you react to the following changes to your preferred charging solution?"



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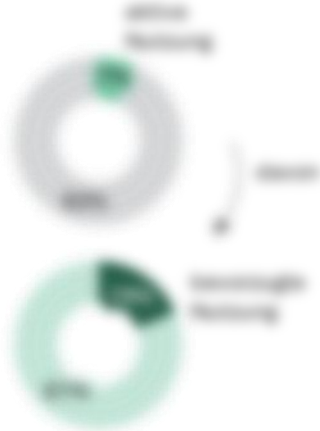
CPO/eMSP provider profiles

CPO/eMSP provider profile: Elli



Eintrag bei fast allen Präferenzgründen deutlich unter dem Durchschnitt und zeigt kein klares Nutzungsspektrum. Die Weiterempfehlung ist verhalten.

Market share:



NPS:



Active use = yes Usage situation:



Preferred use = yes Reasons for preference:



CPO/eMSP provider profiles

CPO/eMSP provider profile: Elli



Die in dieser Studie verwendeten Daten sind ausschließlich für die Zwecke der Studie bestimmt und dürfen nicht für andere Zwecke verwendet werden. Die Verantwortung liegt bei Ihnen.

Preferred use = yes

Decision for preference:



Preferred use = yes

Brand perception:



Preferred use = yes

Possible reasons for disloyalty:





SCALE YOUR USER
SCALE YOUR BUSINESS

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