EXCERPT
(from a total of 130 pages)

CPO/eMSP Charging Services Study 2025

CPO and eMSP services from the user's perspective

USCALE GmbH
www.uscale.digital

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%)

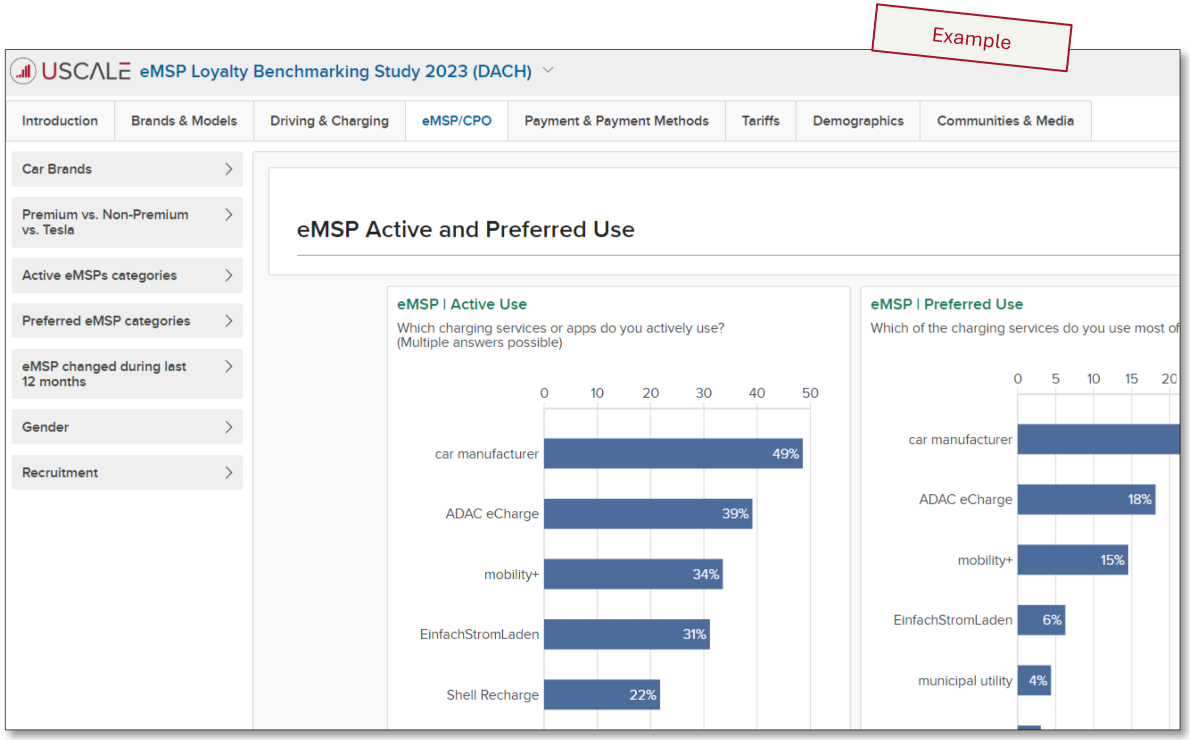
Dashboard for individual analyses

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.



Contents

Management Summary

Management Summary

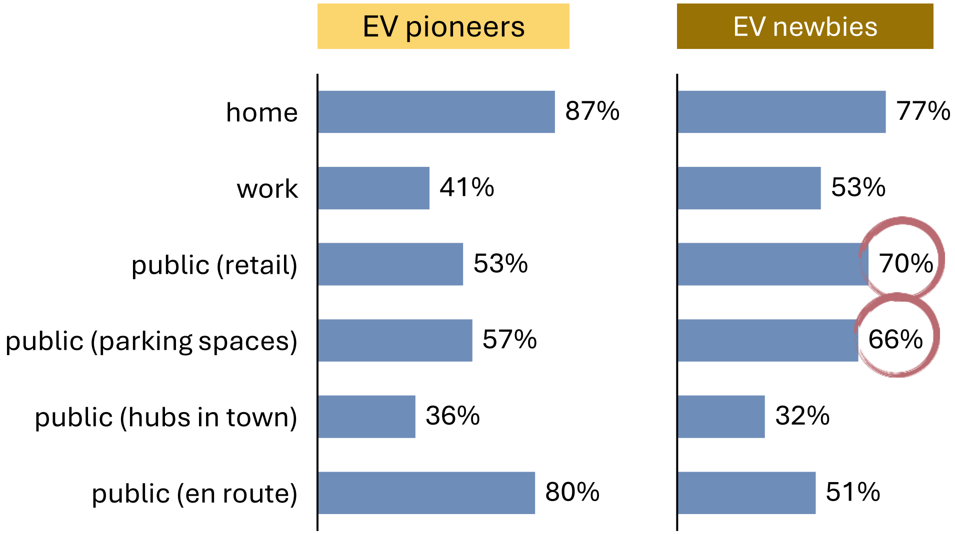
1

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)

Contents

Segmentation of the target group

Three EV adopter segments

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

Background to segmentation:

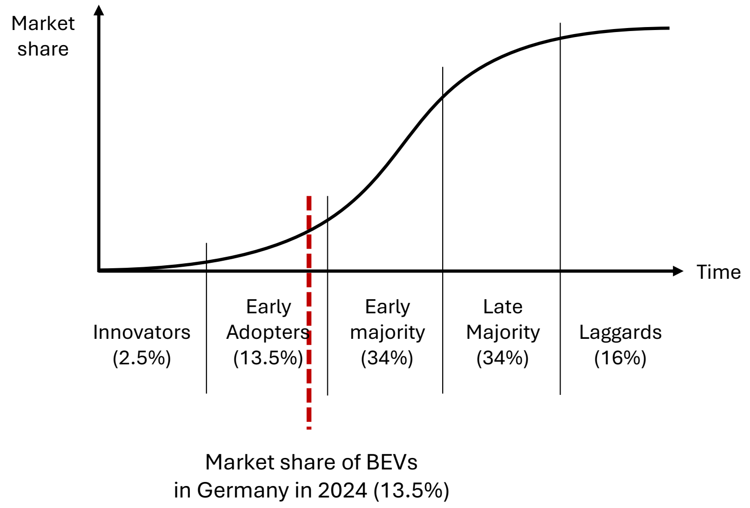
– The best-known model for the ramp-up of innovations segments adopters according to the time of switchover (figure). It assumes (simplistically) that the time of switchover correlates with motivation. (Criticism: many EV enthusiasts switch over later due to the often long car ownership periods).

– 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).

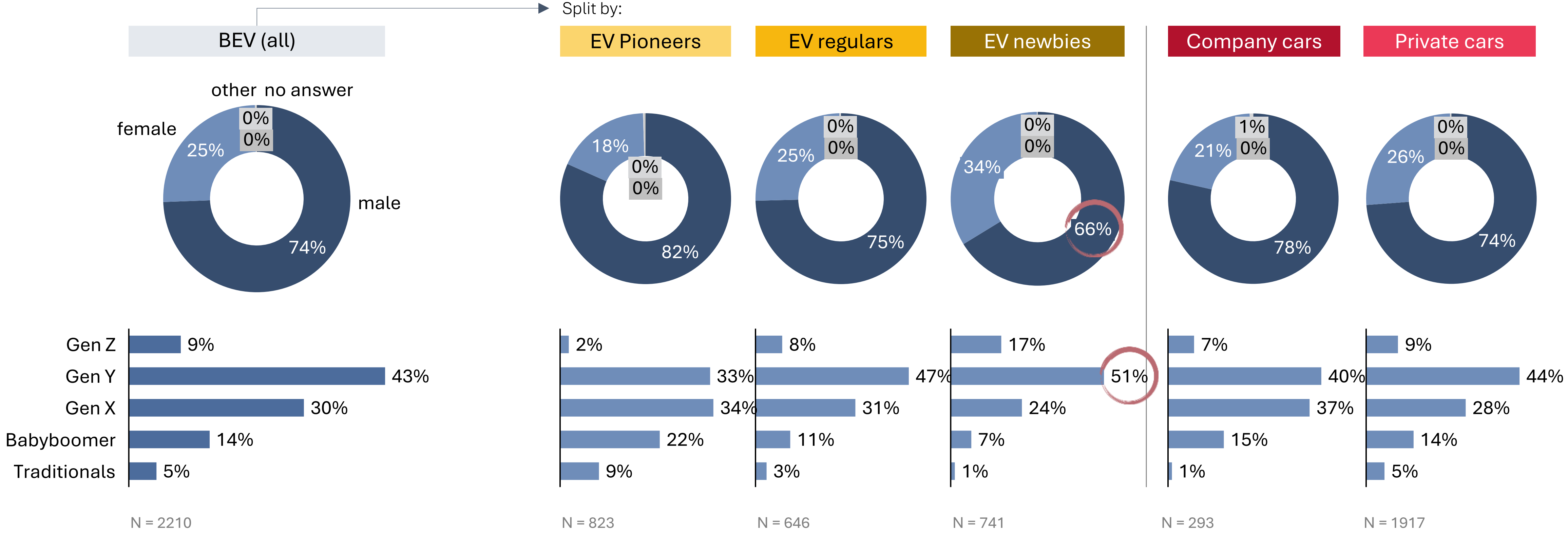
Contents

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.

"Are you...?"



Contents

Preliminary remark

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

1. **KPI: Active usage**

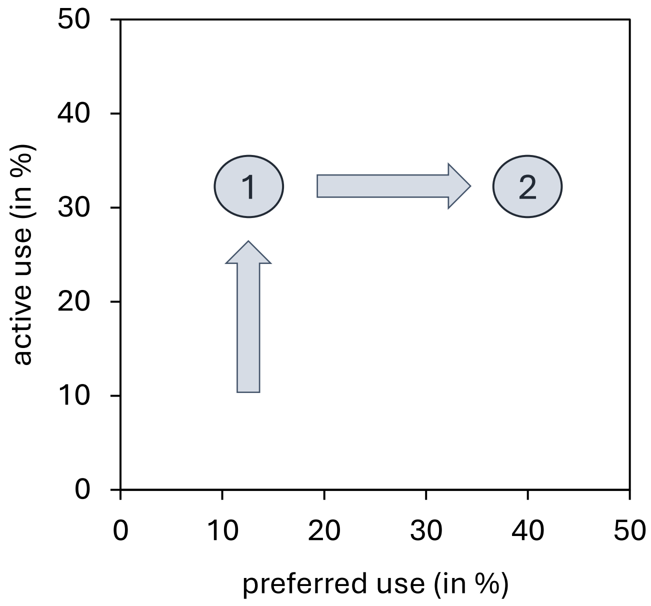
   Apart from ad hoc charging, EV drivers can only use services with which they are registered.

   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".

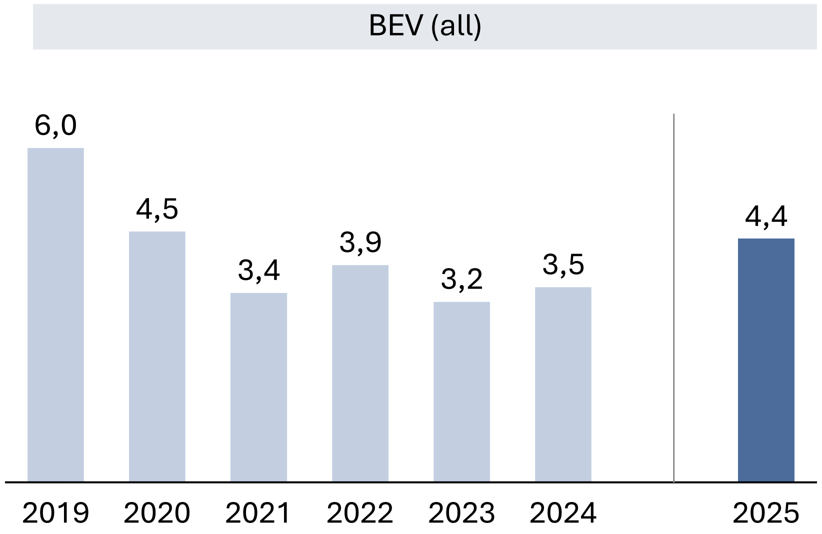
CPO/eMSP of Choice

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.

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

(Multiple answers possible)



N = 2210 (2025)

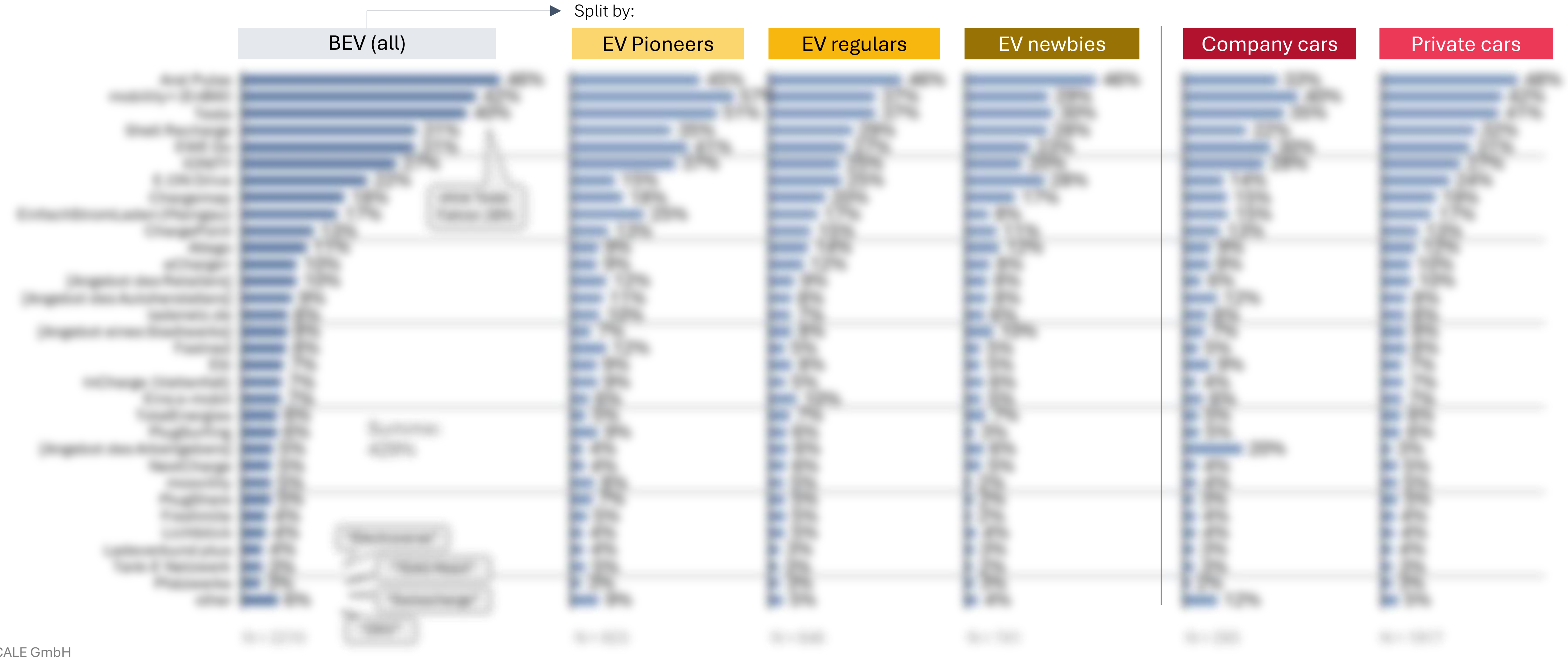
The apparent increase is due to the change in the presentation of charging services (app logos instead of a text list). The values are therefore not comparable with the previous year's results.

Actively used providers

Actively used charging service providers

"Which charging services do you actively use?"

(Multiple answers possible)



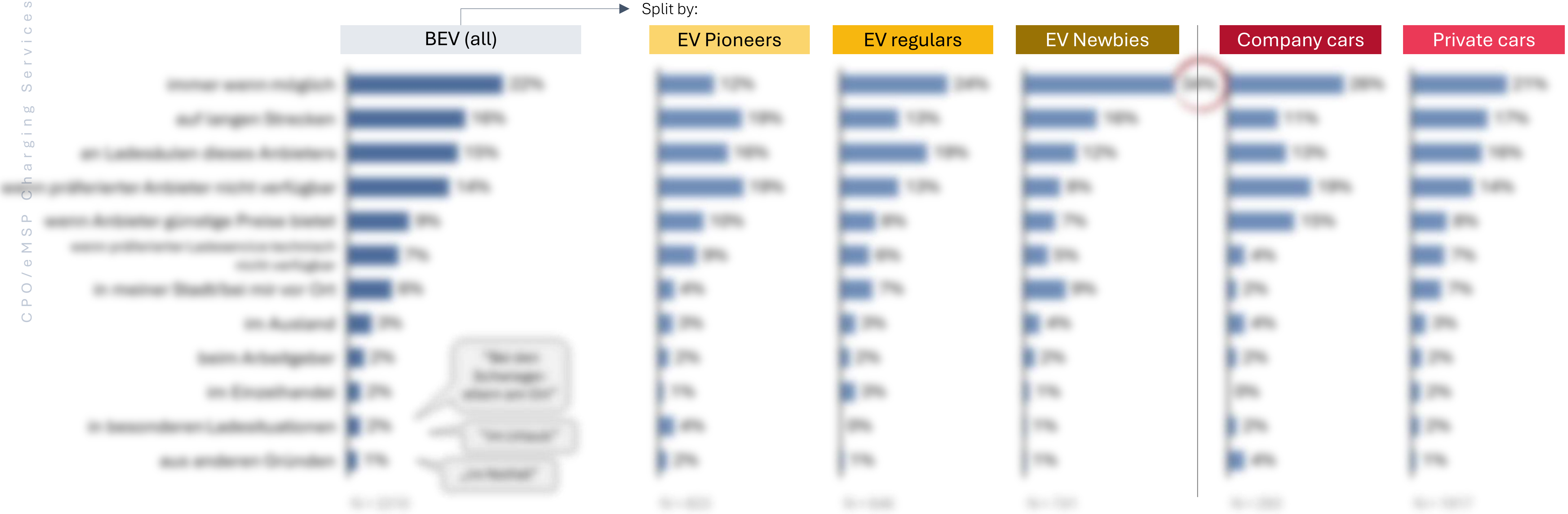
Actively used providers

Usage situations

Providers = used:

"In which situations do you mainly use the selected charging services or apps?"

(Multiple answers possible)



Actively used providers

Recommendation of charging service providers (NPS question)

Providers = used:

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

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.

N = 2210

Contents

Active vs. preferred use

Charging service market shares by customer segment

(Special: excluding Tesla drivers)

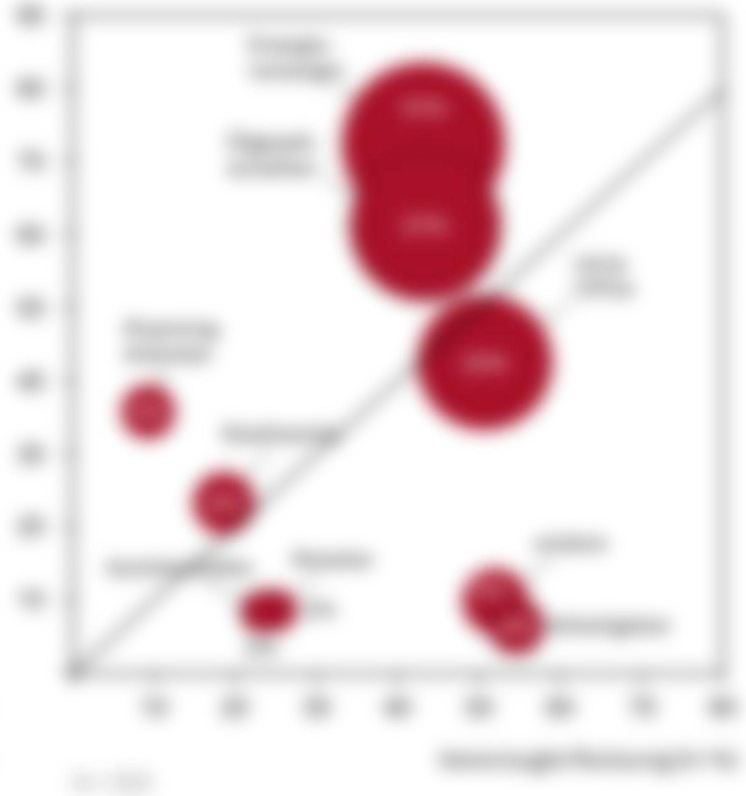
"Which charging services or apps do you actively use?"

vs

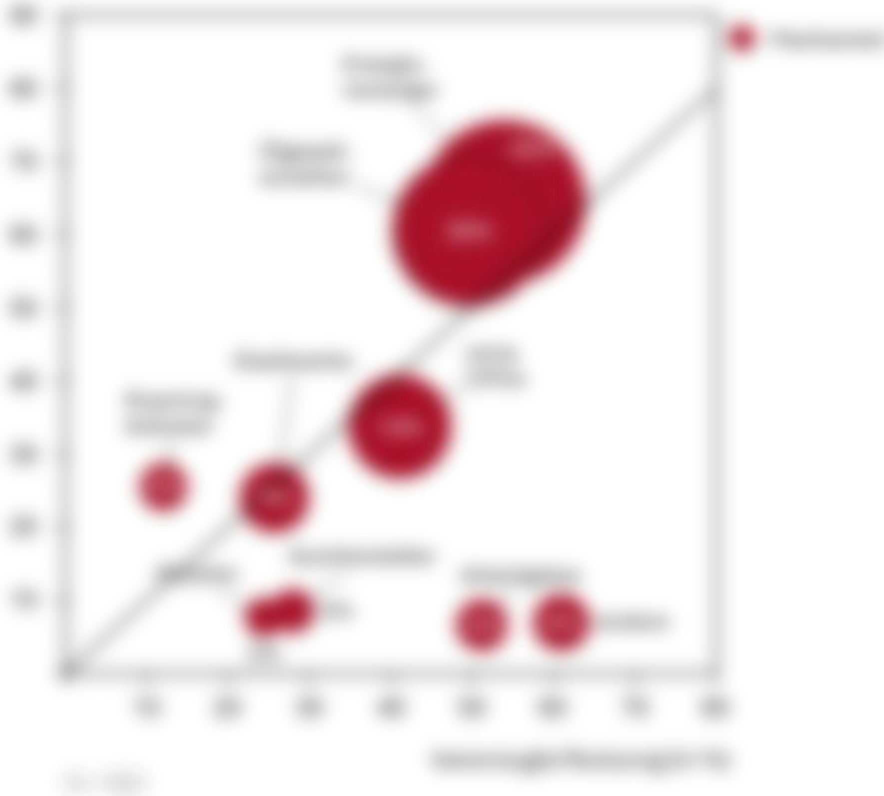
"...preferred?"

EV Pioneers

EV Regulars



EV Newbies



Contents

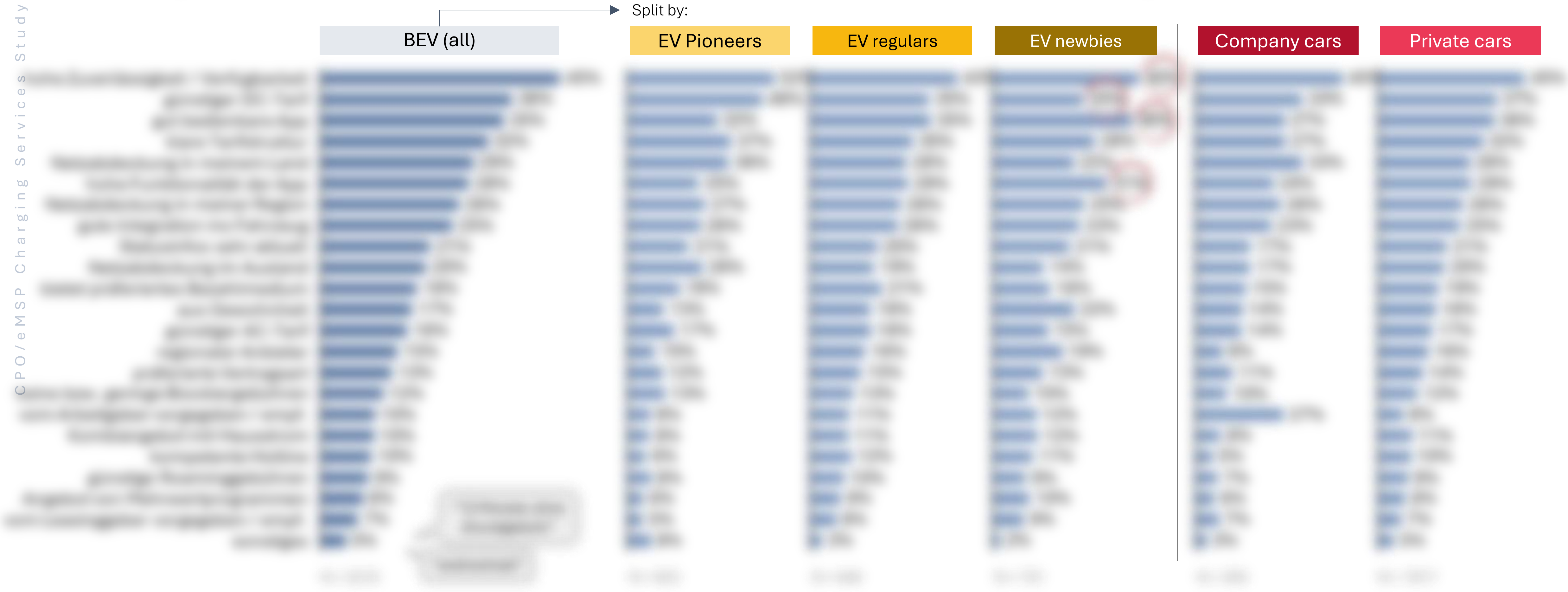
Reasons for preference

Reasons for preference

Provider = used:

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

(Multiple answers possible)



Contents

CPO/eMSP selection decision (CONJOINT analysis)

Conjoint analysis

(Introduction to the method)

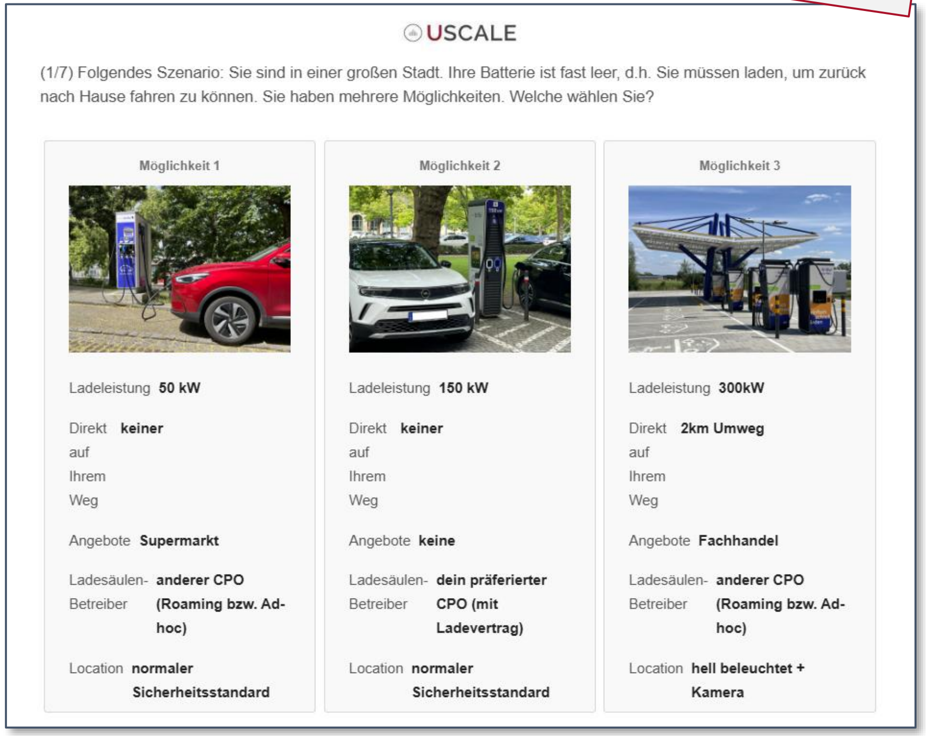
The conjoint method depicts tariff selection as a compromise decision.

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

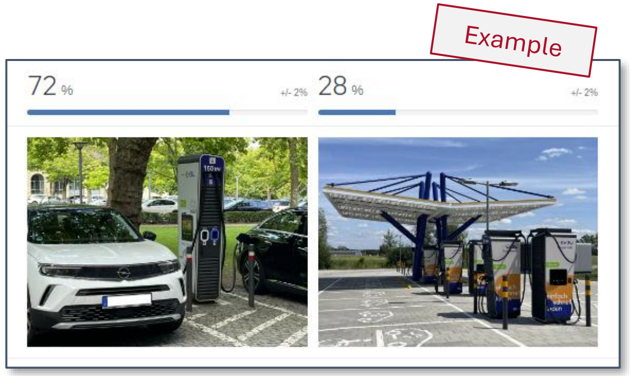


CPO/eMSP selection decision (CONJOINT analysis)

Conjoint analysis

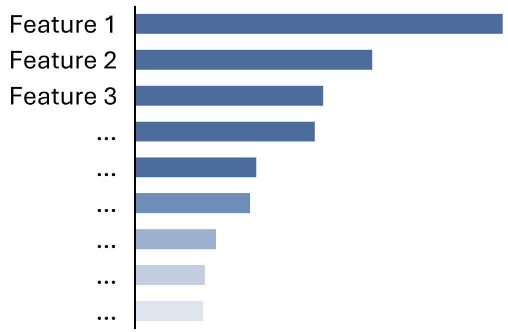
(Sample results)

Simulation of user preferences



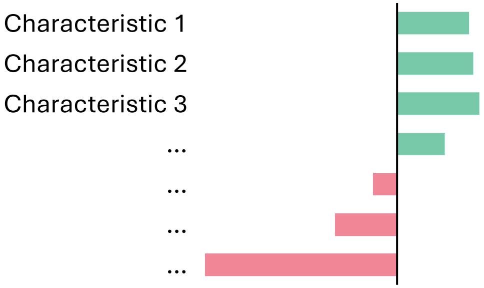
For the simulation, the market potential (using the rule of three) is estimated in comparison to its alternatives.

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

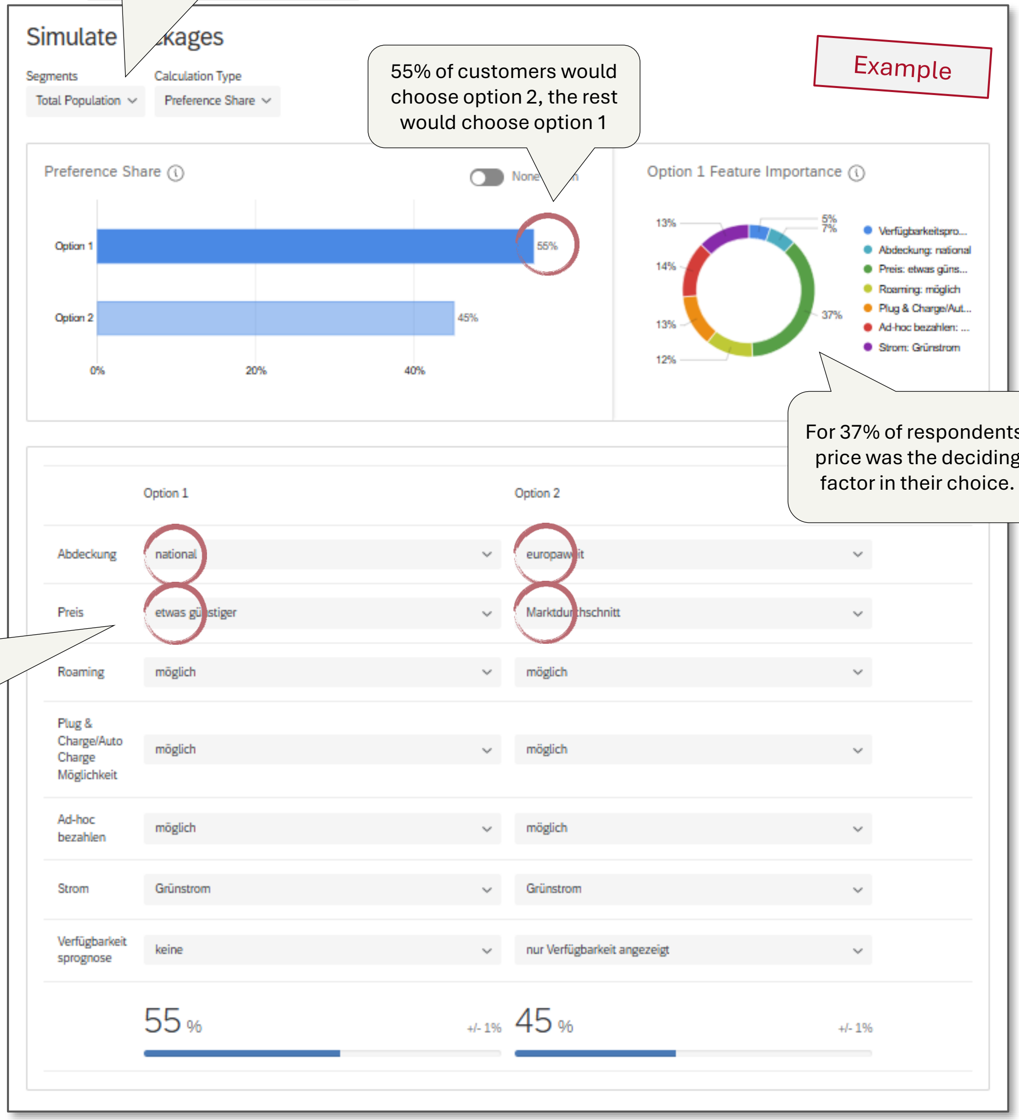
(Instructions for the simulation tool*)

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]



Contents

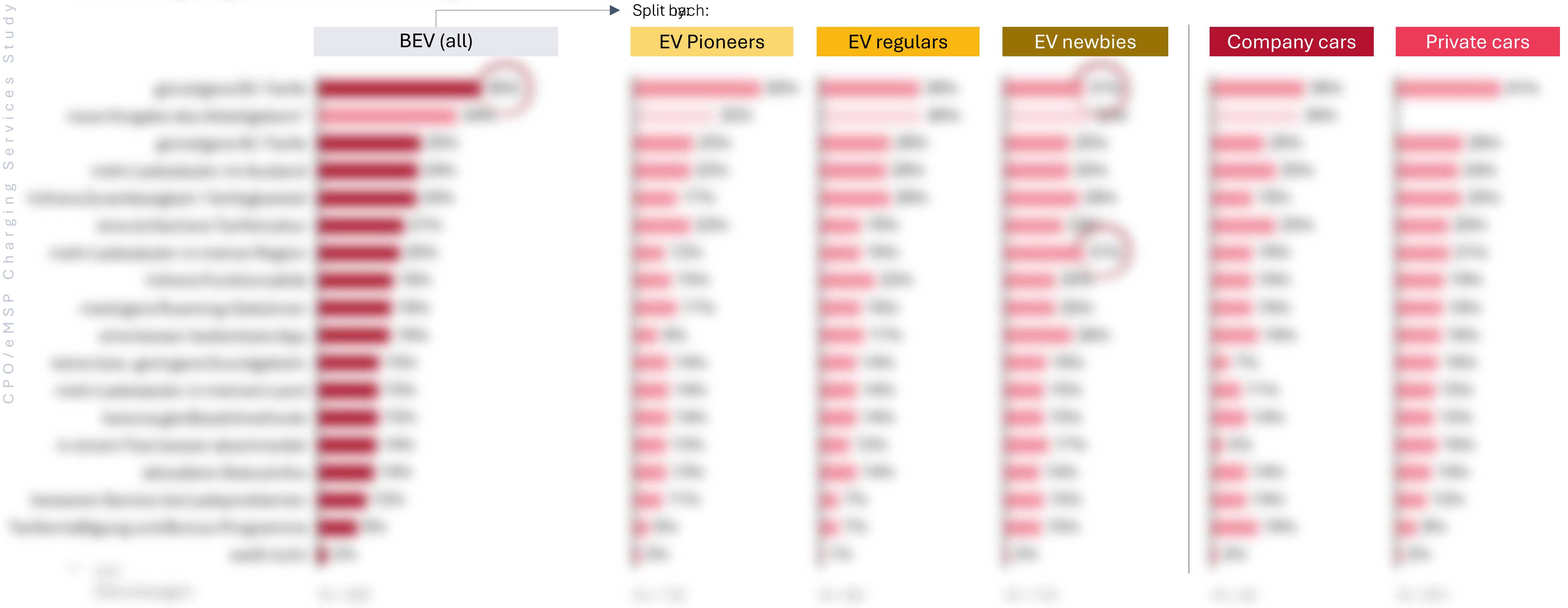
CPO/eMSP loyalty

Reasons for actual disloyalty

"Why did you switch from your previously preferred charging service?

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

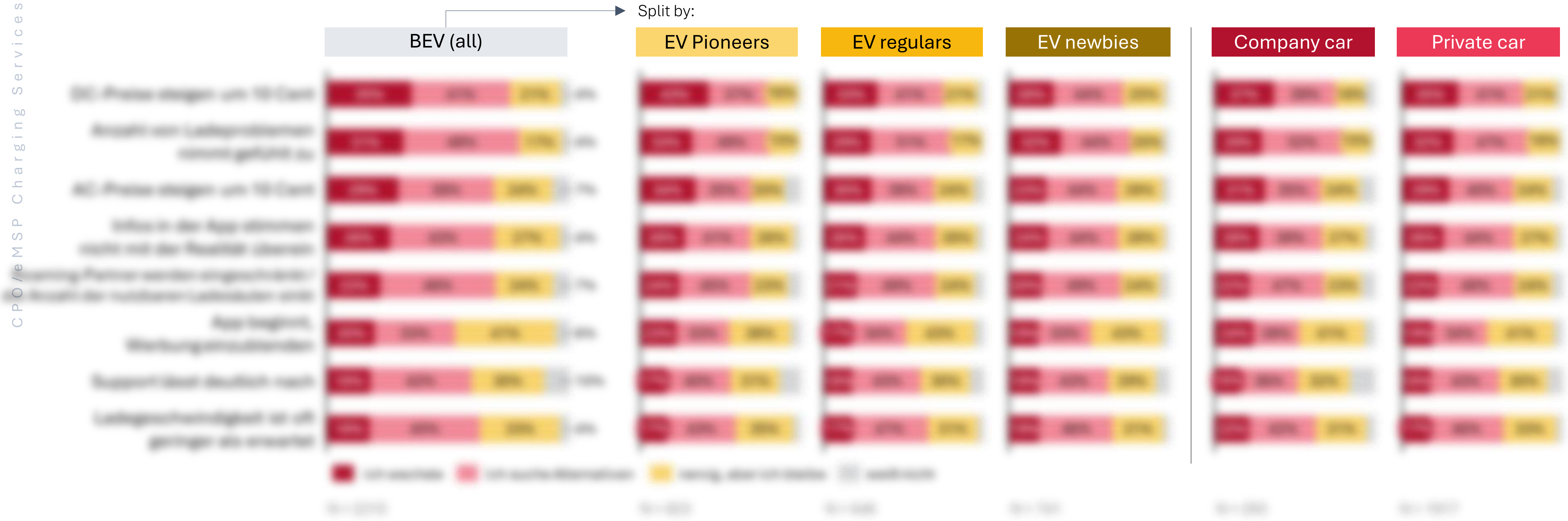
(Multiple answers possible)



CPO/eMSP loyalty

Moments of Truth

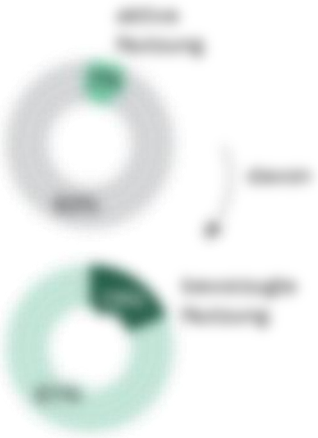
"How would you react to the following changes to your preferred charging solution?"



Contents

CPO/eMSP provider profile: Elli

Market share:



NPS:

Active use = yes

Usage situation:

Preferred use = yes

Reasons for preference:

CPO/eMSP provider profiles

CPO/eMSP provider profile: Elli

Preferred use = yes

Decision for preference:

Preferred use = yes

Brand perception:

Preferred use = yes

Possible reasons for disloyalty:

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