EV Charging Services Study 2025

CPO and eMSP charging services from the user's perspective

Press handout
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USCALE GmbH
www.uscale.digital

Management Summary

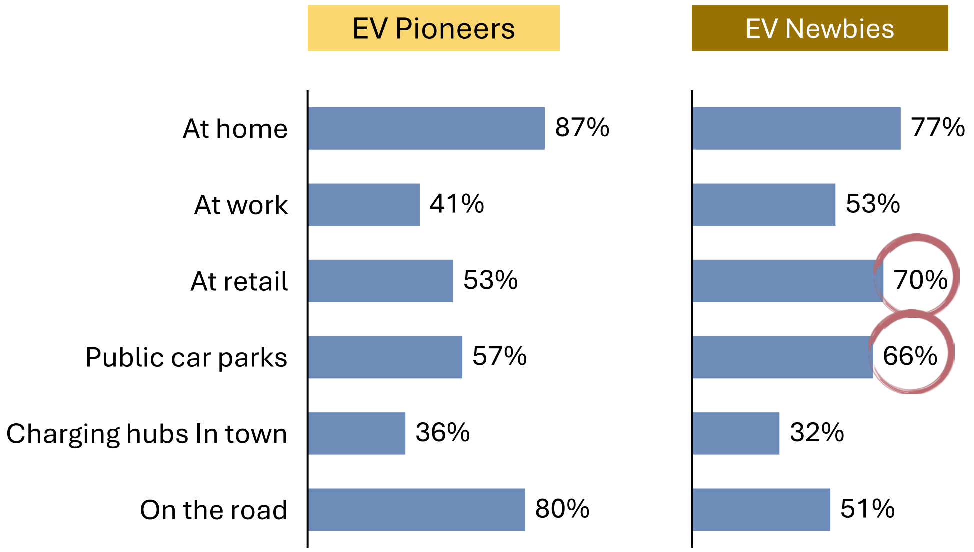
1

Public charging is becoming increasingly important

New EV owners rely on public charging infrastructure more regularly than EV pioneers

As more people switch to electric vehicles, the use of public charging stations is growing at an accelerated pace.

Charging locations used:



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

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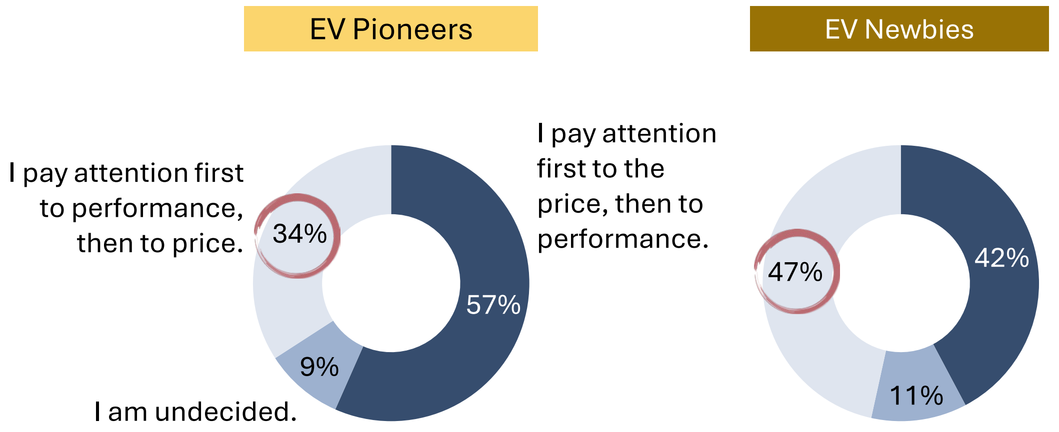
2

Reliability takes priority over pricing

EV drivers fall into two nearly equal groups: those focused on performance and those driven by price.

Although price is often a point of discussion, it's currently taking a back seat—reliability and availability are now leading the decision-making process.

Charging locations used:



"When charging in public: What role does price play for you compared to performance?"

Management Summary

3

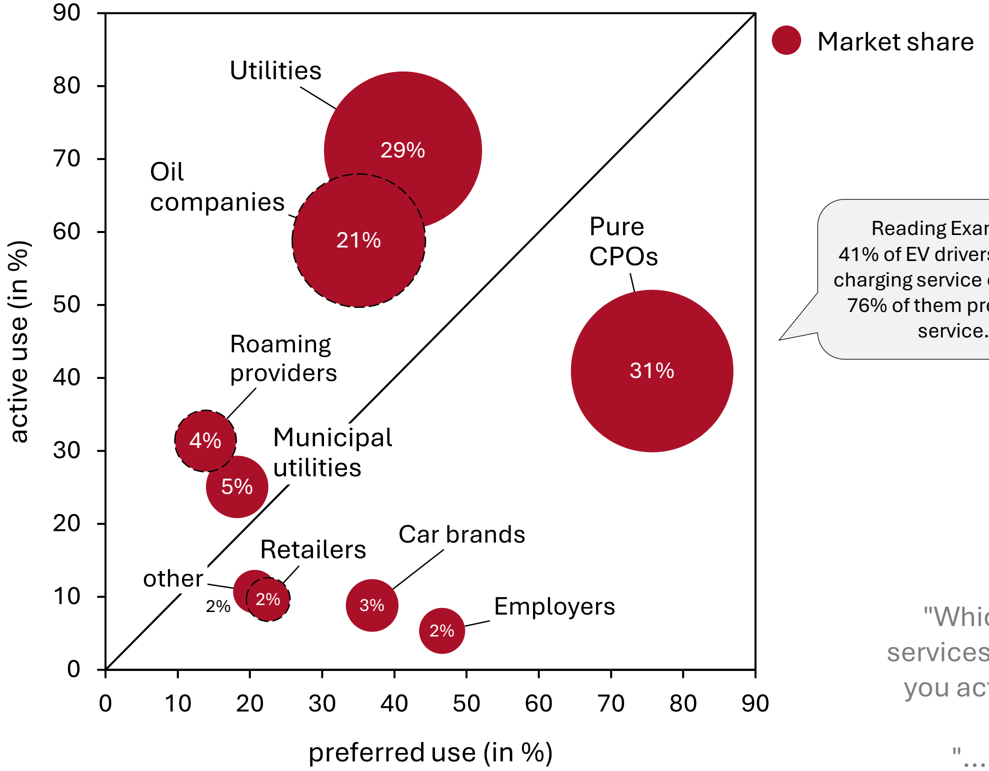
Oil companies expanding their market share

Energy suppliers and pure CPOs each account for about 30% of the market. While energy suppliers see more active use from EV drivers, CPOs are the preferred choice for those who use them.

Oil companies, with a 21% share, now play a more prominent role compared to last year (13%), especially among newcomers to electric driving.

Roaming providers are finally seeing some growth after several years of decline.

Active vs. preferred charging services:



Reading Example:
41% of EV drivers use the charging service of a CPO, 76% of them prefer this service.

"Which charging services or apps do you actively use?"
vs.
"...preferred?"

Management Summary

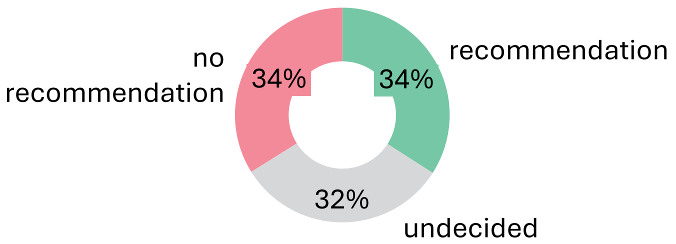
4

Low overall willingness to recommend

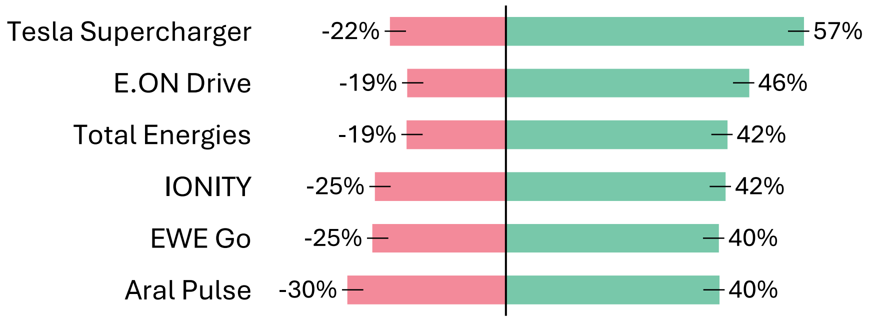
While the willingness to recommend varies widely between providers, the Net Promoter Score—a key indicator in this area—remains modest across the entire sector.

The data highlights an urgent need for improvements by all industry players.

Willingness to recommend across all providers:

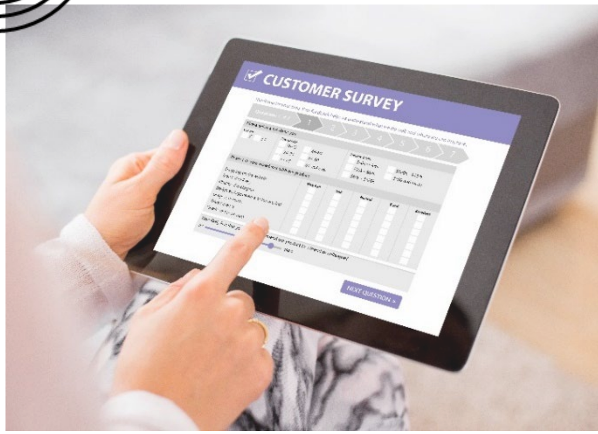


Willingness to recommend TOP 6 providers (out of 32):



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

Target group



Survey:

– Target group:	Owners of fully battery-powered electric vehicles (not 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%)

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Objective

Initial situation:

- Charging services offer providers not only revenue but also play a vital role in building customer loyalty. To achieve this, EV drivers must not only use these services but prefer them over others.
- With a multitude of eMSP and CPO options, competition has intensified; brands matter more than ever for standing out in a fast-expanding market.

Questions:

- Which eMSP or CPO services do EV drivers actively use, and which do they prefer? What market shares do the key provider groups hold, and how are these changing?
- How are eMSP and CPO brands perceived?
- What drives EV drivers to choose their preferred charging service?
- What differences exist between various user segments

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