



Charging Payment Study 2026:

Why paying at charging stations is so frustrating and what providers can do about it

Press Handout
03/02/2026

Objective

Initial situation:

- There are over 1,000 eMSP and CPO offerings in Germany. This leads to fierce competition in a rapidly growing market.
- At the same time, the offering of payment methods and means of payment at public charging stations is growing. This leads to high costs for CPOs, without it being clear which methods and means are really in demand among EV drivers.

Question:

- Which authorisation and payment methods do EV drivers use or would they like to use? Which criteria influence the choice of payment method and means of payment?
- Is there a connection between the desired payment method and willingness to pay, or price elasticity? How flexible is behaviour? How can EV drivers be persuaded to switch?
- What are the expectations regarding receipt generation and invoicing?
- What are the differences between different target groups?



Management Summary

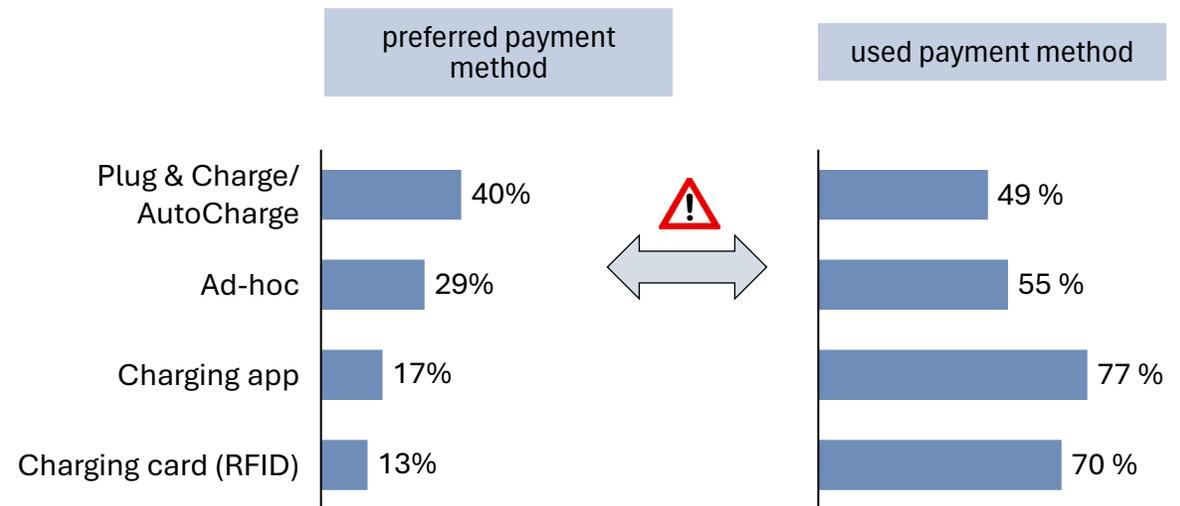
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Desire and reality diverge

EV drivers would prefer to pay using Plug and Charge/Autocharge or ad hoc. However, they use charging apps and charging cards much more frequently, which are far less popular.

The reasons lie in the user experience, which is unsatisfactory with the preferred methods, so that less attractive methods are often resorted to.

Payment methods for public charging:



„If one day all charging stations offered your preferred payment method and it always worked perfectly, which one would it be?“

„Which payment methods do you use?“
(Multiple answers possible)

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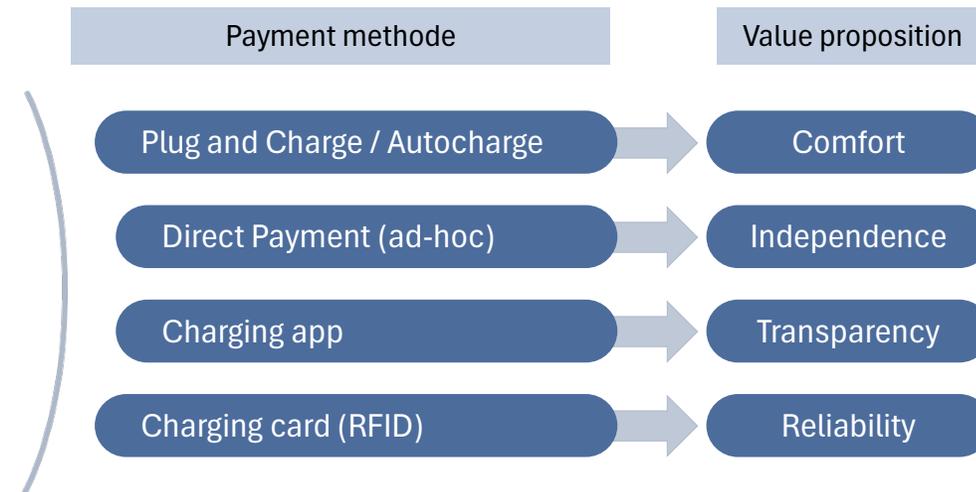
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Each payment method has its own strengths

Customers have several requirements when it comes to payment: the payment process should be convenient and reliable, and prices should be low and transparent, without customers having to commit to a particular provider.

Each payment method offers one of these advantages, but none of them offer all of them. This means that every method is a compromise.

Value proposition of individual payment methods:



[Evaluation of all payment methods using semantic differential]

Management Summary

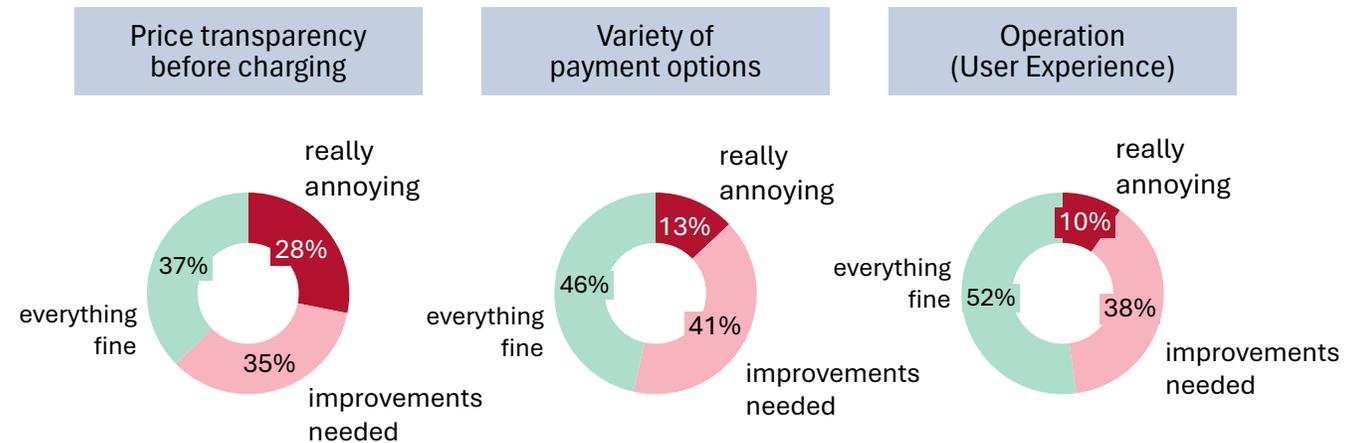
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Moderate satisfaction with payment at charging stations

Satisfaction ratings for various aspects of payment are very modest compared to other aspects of the charging experience.

The lack of price transparency is perceived as particularly annoying. Other USCALE studies have shown that annoyance about the lack of price transparency is even higher than annoyance about high prices.

Satisfaction with various aspects of payment:



„In general:
How would you rate the overall payment situation at public charging stations?“

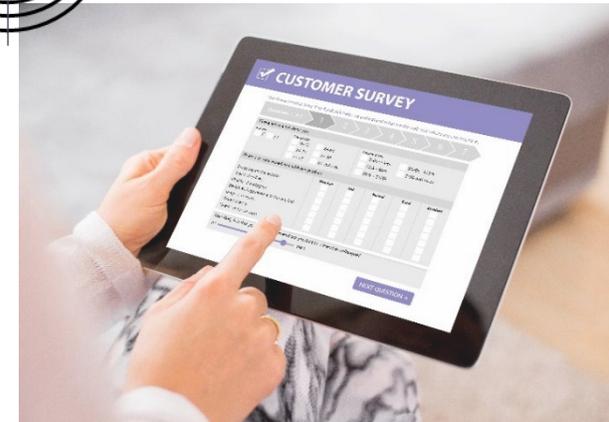
Target Group

Survey:

- Target group: BEV drivers who charge at public
- Survey: Online survey (CAWI)
- Country: Germany
- Recruitment: Social media, access panel
- Length of interview: 15 min
- Field phase: November 2025

Sample

- Total sample: N = 1,510
of which:
 - Social media panel: N = 508
 - Access panel: N = 1,002





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Dr Axel Sprenger

Managing Director
USCALE GmbH

mail axel.sprenger@uscale.digital
phone +49 172-1551 820
web www.uscale.digital
post Silberburgstrasse 112
70176 Stuttgart

