

EXAMPLE SLIDES

EV Satisfaction Study 2026

EVs from the Users' Perspective

EV Satisfaction Study 2026 (DACH)

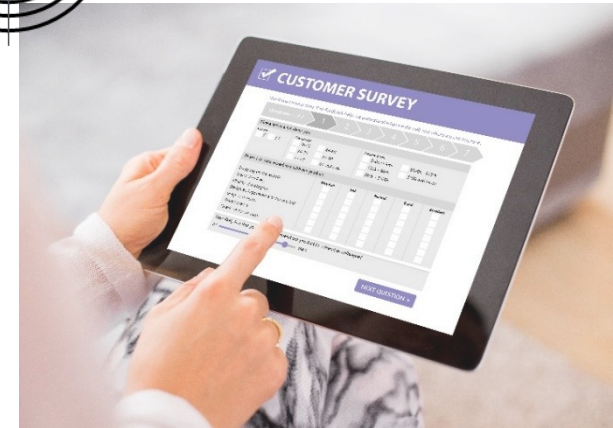
Target Group

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: June – July 2026

Sample size:

- Total sample size: N = 4,004



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

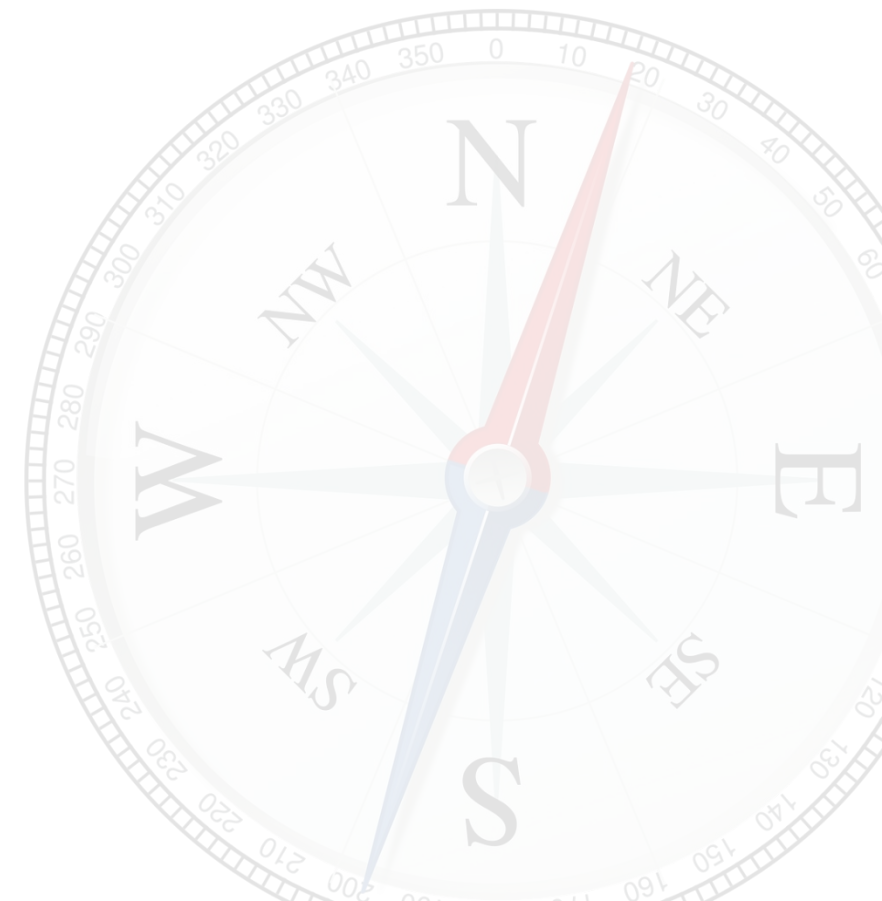
EV Owners were asked about EV-specific features according to...

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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- (2) Target Group and Sample
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- (3) Survey Results
 - 1. Driving, Range, Eco Mode and Regenerative Braking
 - 2. Vehicle Acoustics and Functional Noise
 - 3. Heating and Air Conditioning (HVAC)
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 - 6. Connect App
 - 7. Charging Management
 - 8. Overall Rating & Recommendations



Management Summary

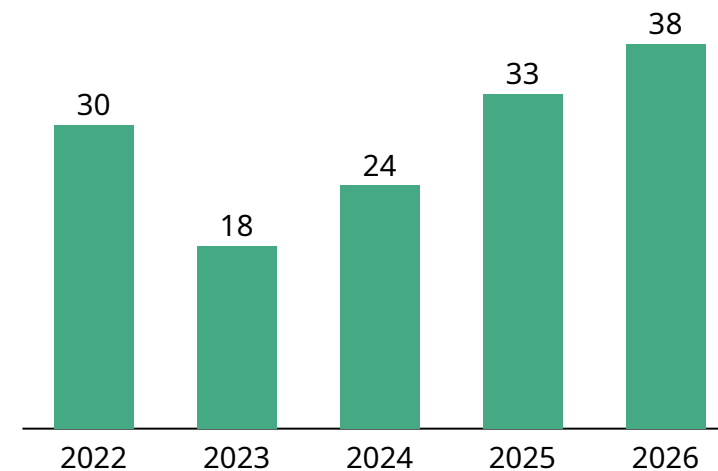
1

Increasing readiness to recommend their EVs

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

Compared to 2025, the Net Promoter Scores, an indicator for the owners' willingness to recommend their EV to a friend, has increased by 5 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?"

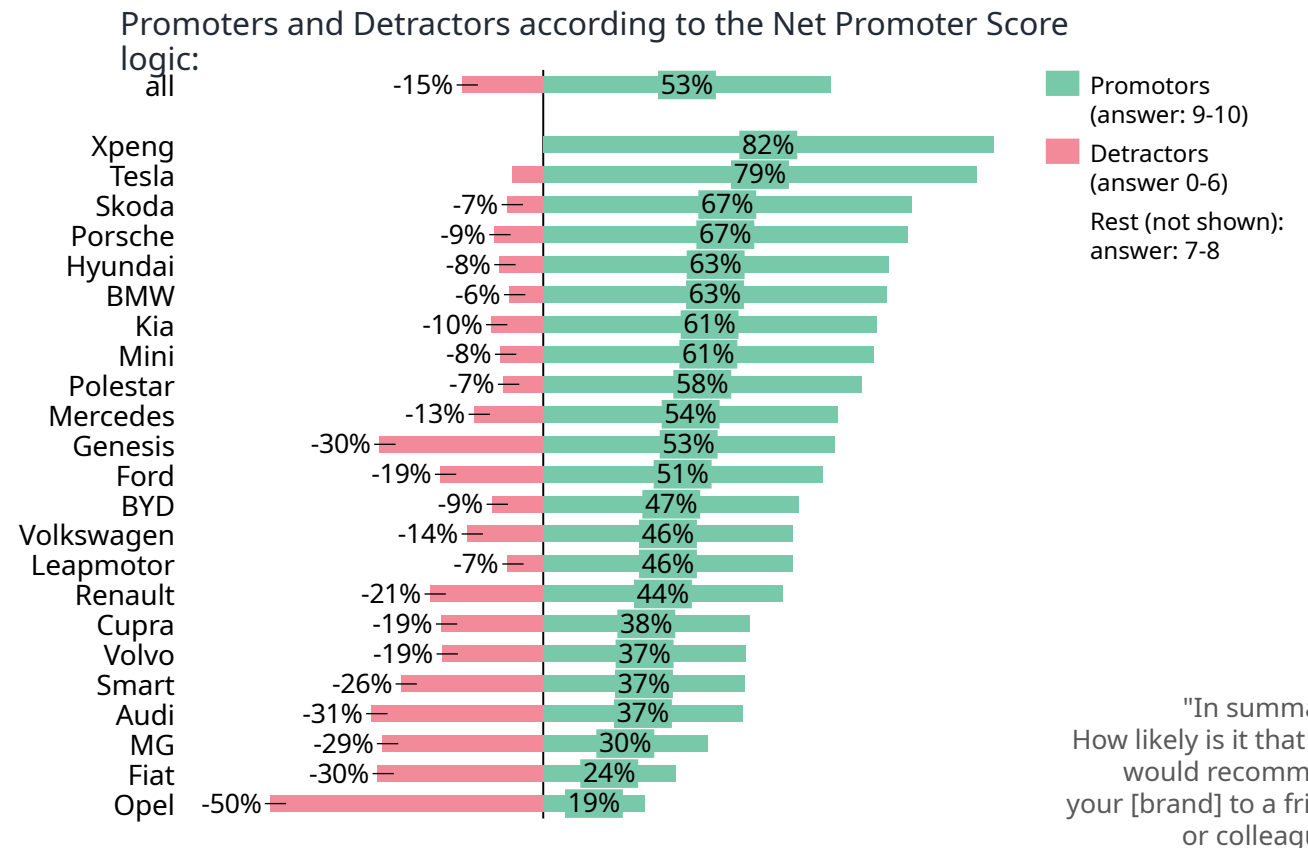
Management Summary

2

High spread between recommendation of the brands

However, the performance of the brands varies considerably. XPeng stays on top, followed by Tesla, Skoda and Porsche. MG, Fiat and Opel bring up the rear.

Overall, Chinese show high performance spread with XPeng in top ranks, while Smart and MG disappoint.



Management Summary

3

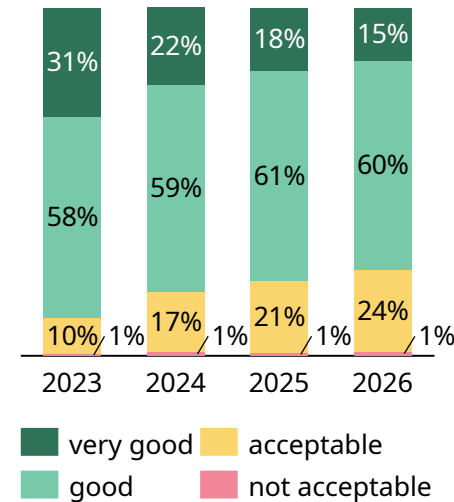
Range follows expectation

Expectations are rising: 75% rate a 'real' summer range of 400 km as (very) good. In recent years, this figure was significantly higher.

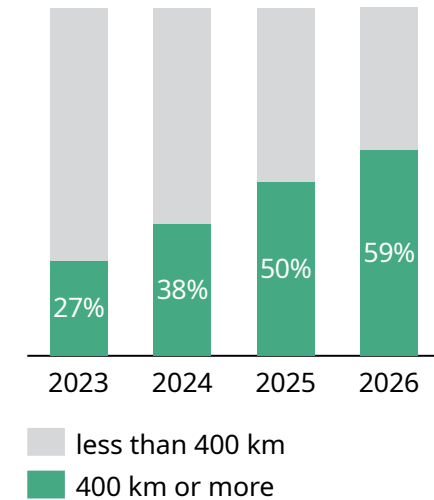
At the same time, actual ranges have improved significantly: Today, 59% of respondents state that they drive an EV with a real summer range of more than 400 km.

'Real' summer range of 400 km:

Expected range



Actual range



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

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

Management Summary

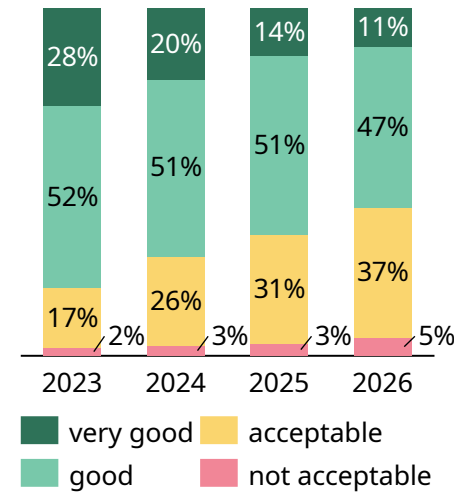
4

DC charging power outperforms expectation

While last year 65% of EV drivers rated a charging power of 150 kW as (very) good, this year the figure is only 58%.

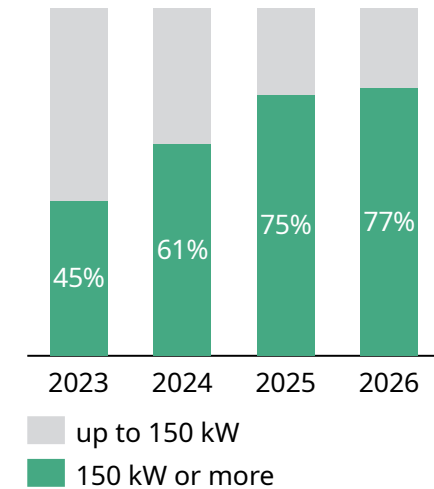
Reality is keeping pace: as charging power requirements increase, so do the actual values of EVs: 77% of all respondents say that their EV has a maximum charging power of 150 kW or more.

Maximum DC Charging Power of 150 kW:
Expected charging power



"Independent of the charging power of your [brand]:
How do you rate a DC charging power of 150 kW?"

Actual charging power



"What is the actual maximum DC charging power of your [brand]?"

Management Summary

5

Many recommendations to the brands

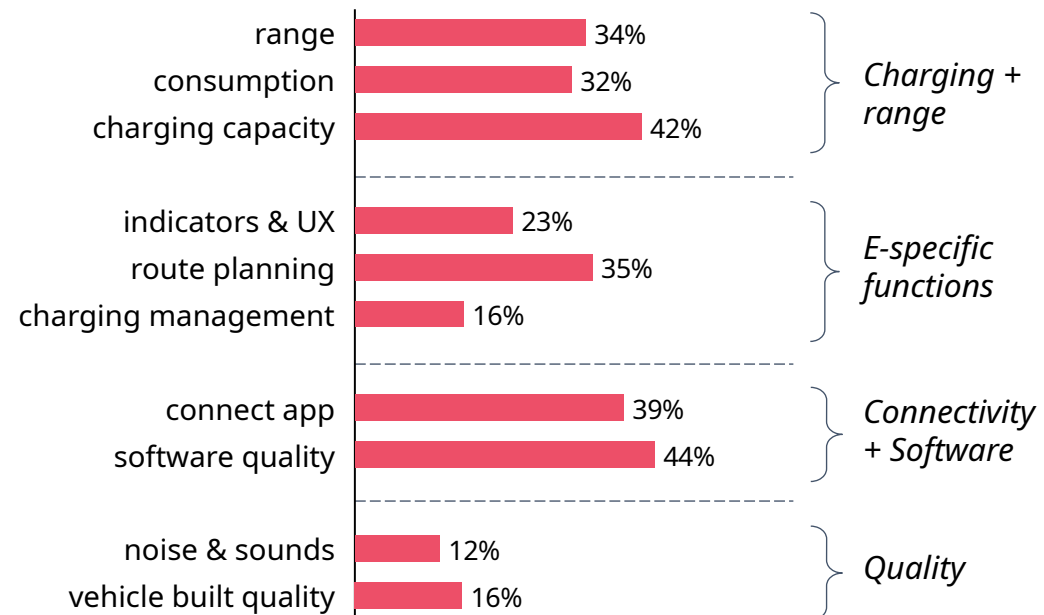
Despite the improvements, there is still much to be done.

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 prioritize for improvement?"

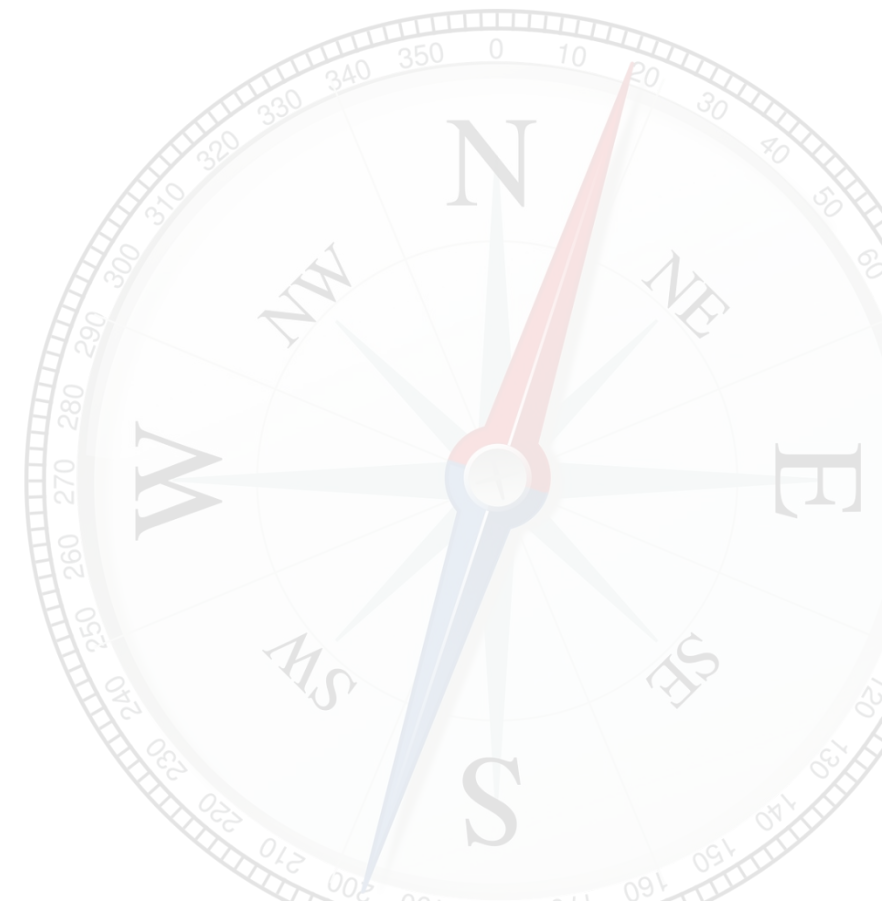
Content

- (1) Management Summary
- (2) Study Design & Sample Overview
- (3) Target Group



(4) Survey Results

1. Driving, Range, ECO Mode and Regenerative Braking
 - Driving Behavior
 - Driving Range
 - ECO Mode
 - Regenerative Braking
2. Vehicle Acoustics and Functional Noise
3. Heating and Air Conditioning (HVAC)
4. Operating and Display Concept (HMI)
5. Navigation System
6. Connect App
7. Charging Management
8. Overall Rating & Recommendations

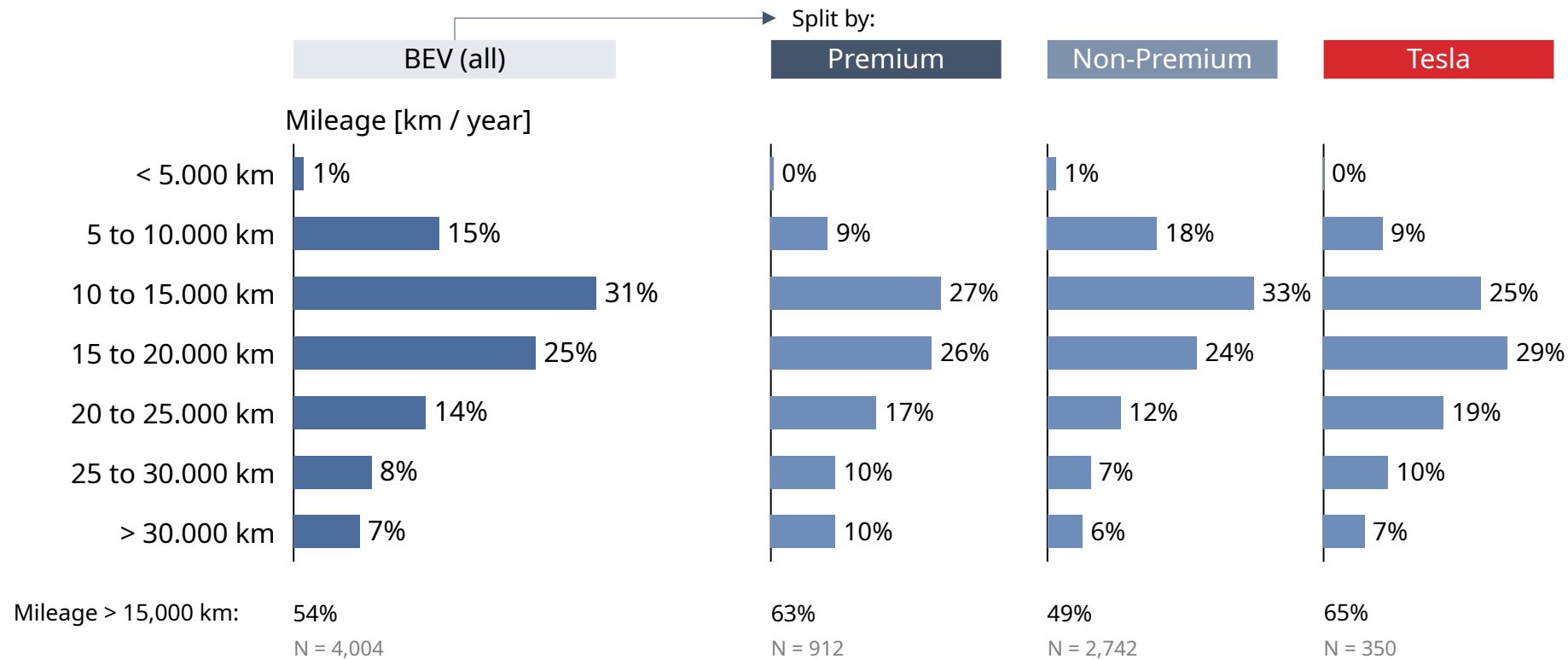


Driving Behavior

Mileage / Year

The average annual mileage is still higher than that of combustion engines (which is less than 15,000 kilometers according to DAT reports).

"Approximately how many kilometers do you drive with your [brand] per year?"



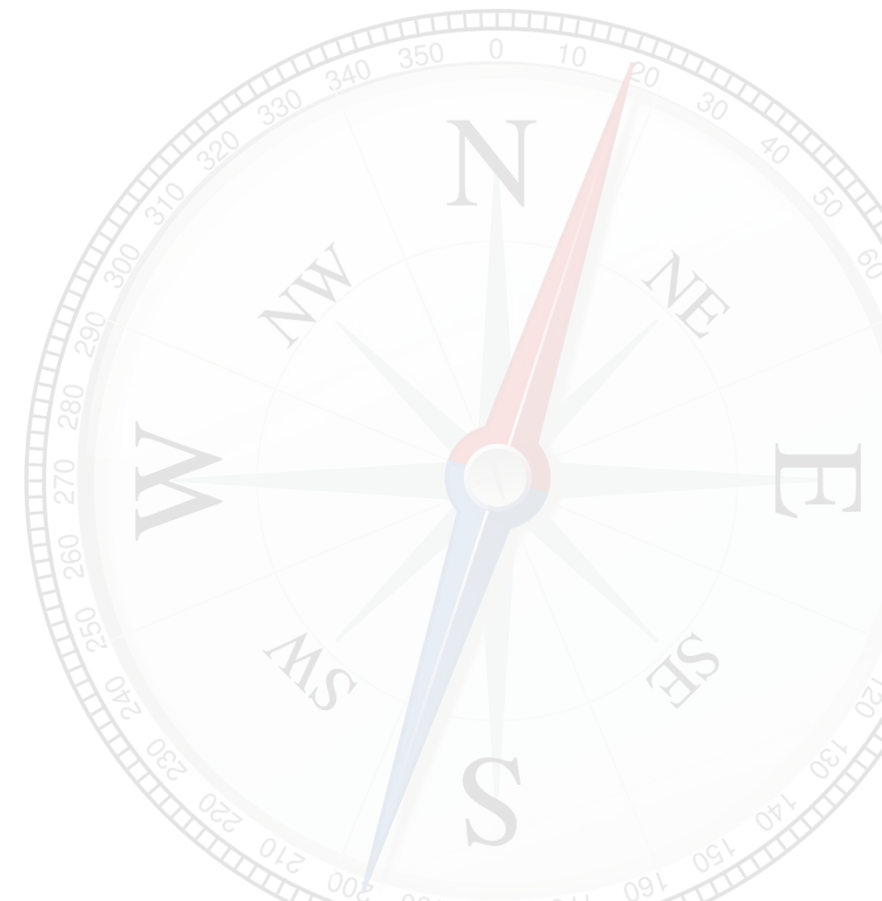
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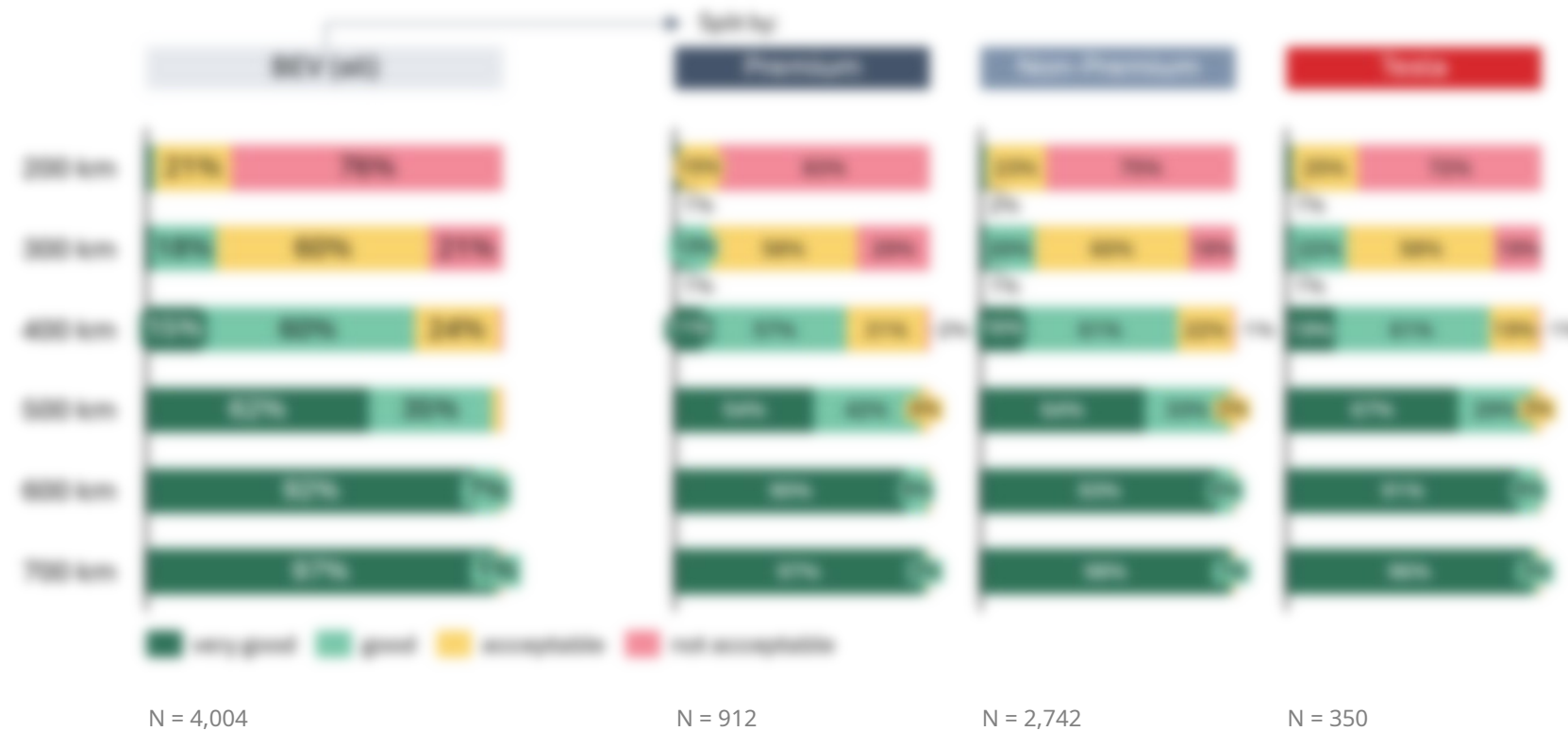


Driving Range Range Assessment

However, only 15% think a real summer range of 400 km is very good. Expectation of premium car drivers is higher than the expectation of non-premium brands drivers. Note: Tesla drivers have lower expectations than drivers of premium brands.

"Regardless of the range of your [brand]:

How would you rate the following 'real' summer ranges for an all-electric vehicle?"



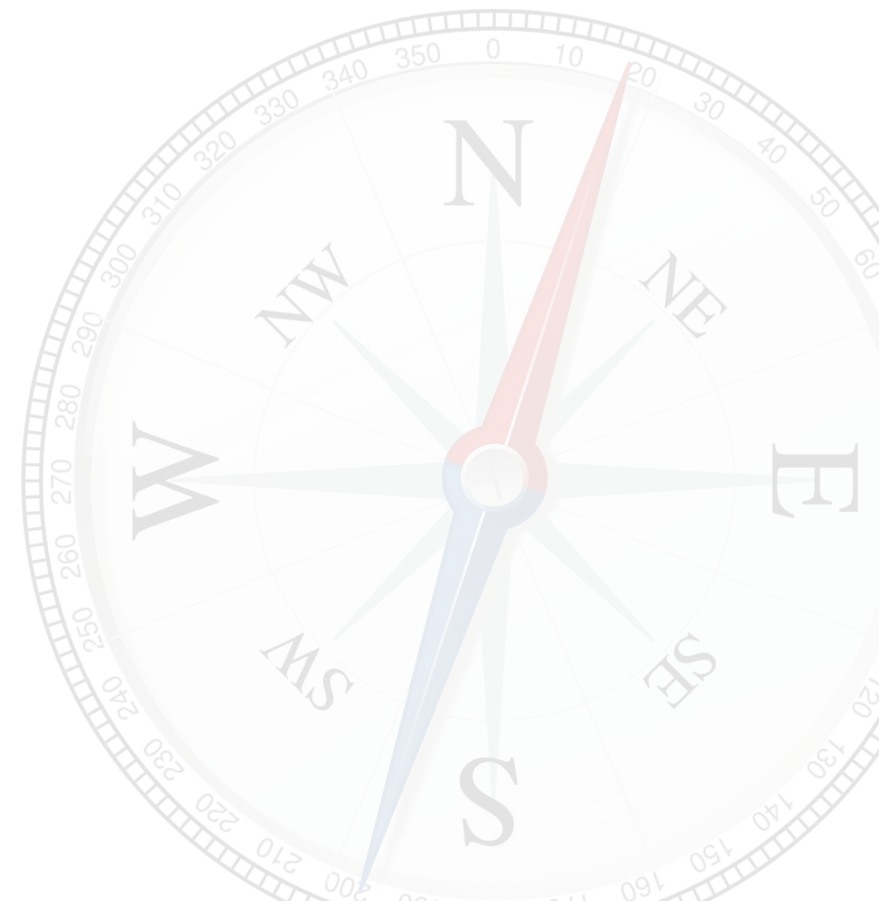
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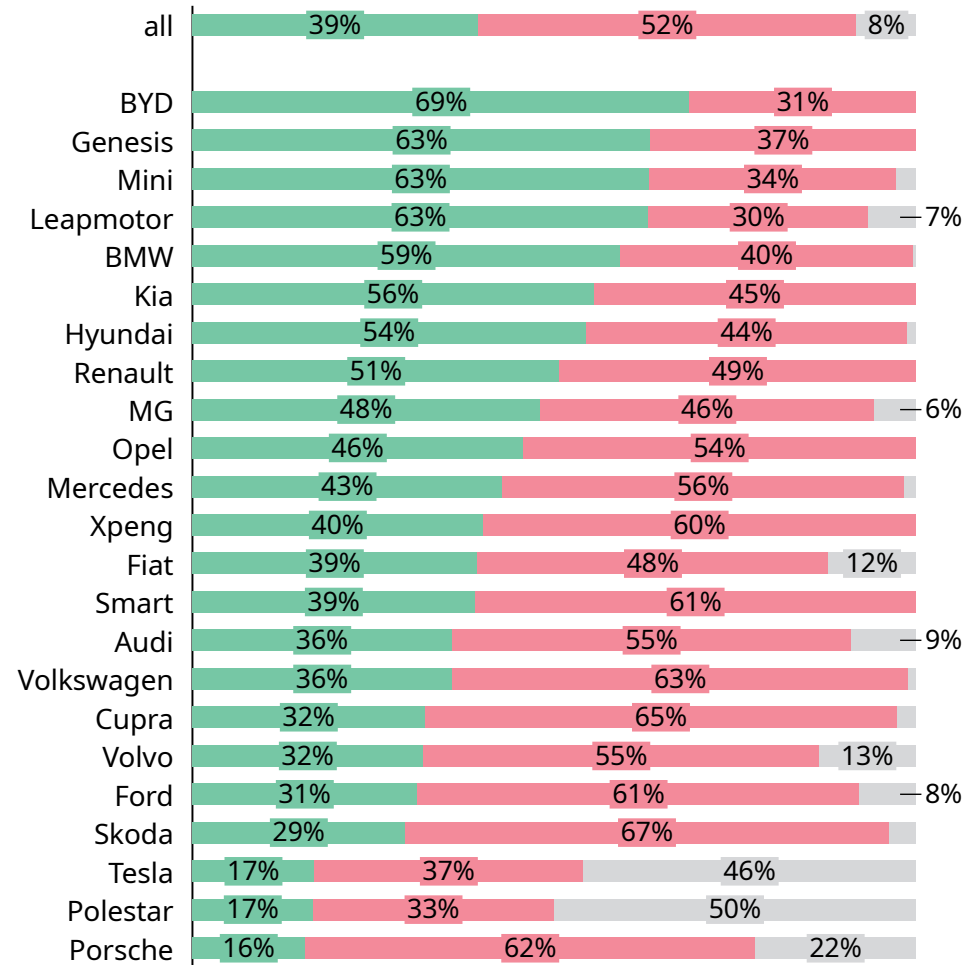
ECO Mode

ECO Mode Usage

Approximately 40% of EV drivers whose vehicle has an ECO mode use it. The figure has declined compared to 2025.

"Do you use the ECO mode in your [brand] to maximize range?"

(Other designations or names may be used for your [brand])."



Reading Example:
39% of all Fiat drivers
use the ECO mode.

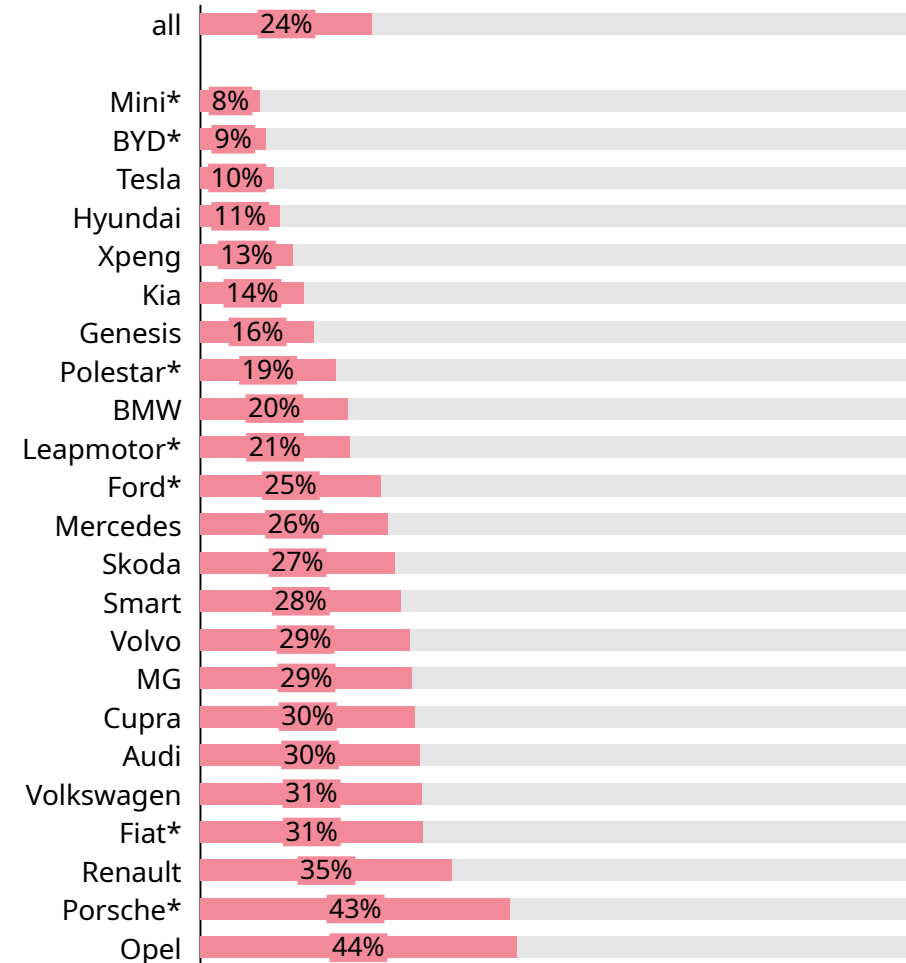
yes
no
My car does not
have an ECO mode

N = 30 - 680

ECO Mode Problems

One in four cite problems when using ECO mode. In 2025, the figure was 21%.

Reading Example:
26% of Mercedes
drivers reported one
or more problems
with the ECO mode.



ECO mode usage = yes:
"Have you encountered
any issues or
difficulties while using
the ECO mode?"
(any problem marked)

N = 7 - 244

* N < 30

ECO Mode

Concept Maturity

Of the 27 concepts assessed, the ECO mode concept ranks 10th. The weighted average value has not improved compared to 2025*.

* The weighted average of all responses for

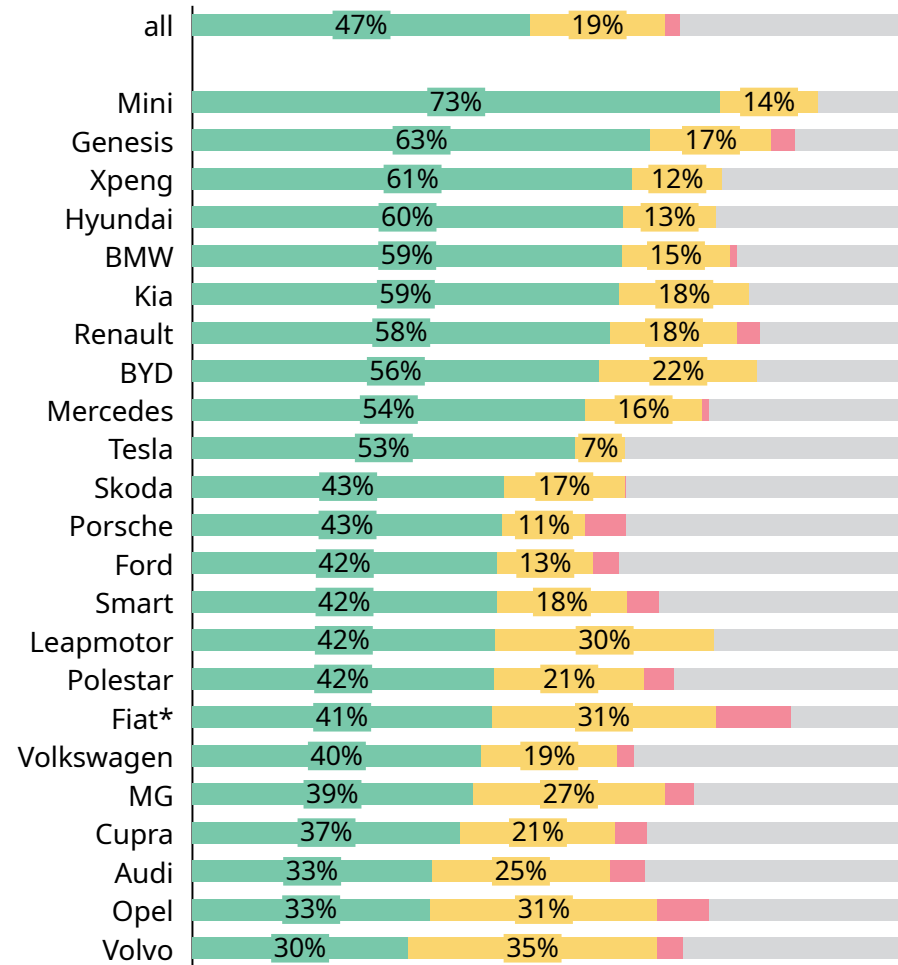
- 1 = poorly developed
- 2 = need for improvement
- 3 = well developed

is a value of 2.66 points.

For comparison:

- 2025: 2.68 points
- 2024: 2.60 points
- 2023: 2.59 points
- 2022: 2.55 points

* N < 30



N = 29 - 673

ECO mode = available:

"What is your opinion on the maturity of the technical concepts implemented in the ECO mode of your [brand]?"



ECO Mode

Accepted Restrictions

Restrictions on driving performance are accepted by most respondents. Limitation of the charging power or comfort are not acceptable.

ECO mode = available:

"ECO modes save energy. Unfortunately, this usually comes at a cost."

Which restriction terms of range, do you find the most acceptable?"

EV SATISFACTION STUDY 2026



ECO Mode

Recommendations

Almost one out of four recommendations relate to the effect on range and the efficiency of the ECO mode. People complain about the insufficient performance.

ECO mode usage = available:

"Do you have any recommendations to [your brand] for ECO modes?"



For all AI clustered verbatims see study dashboard

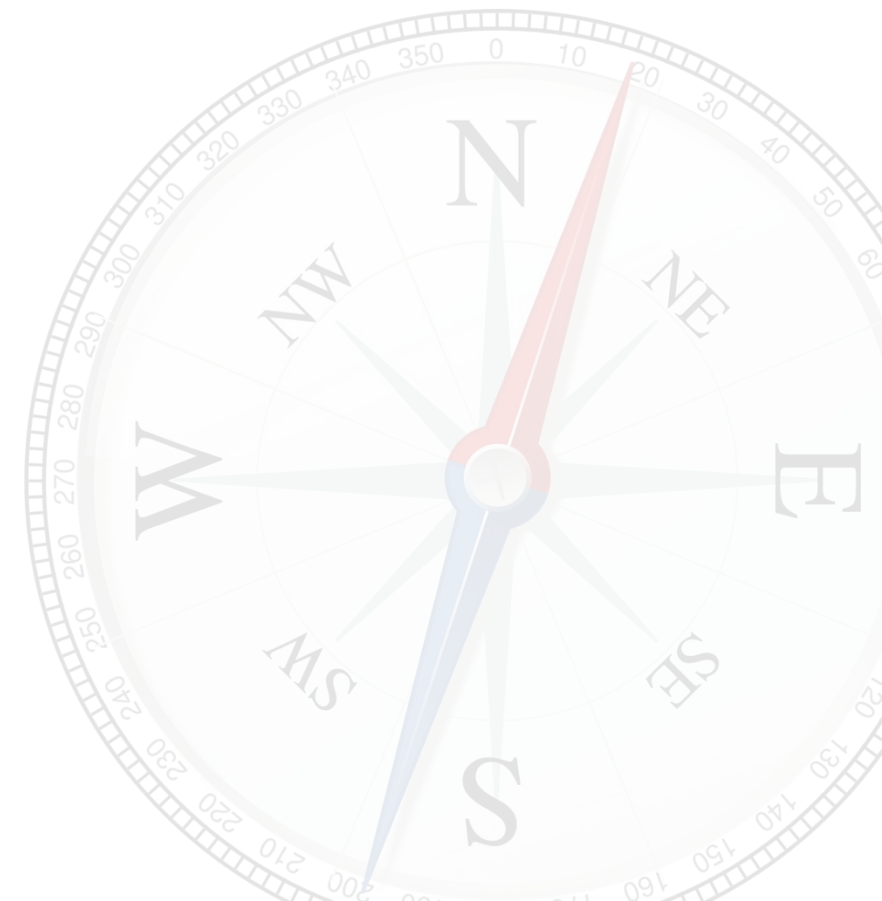
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Charging Socket and Cable

Concept Maturity (Stowage of Charging Cable)

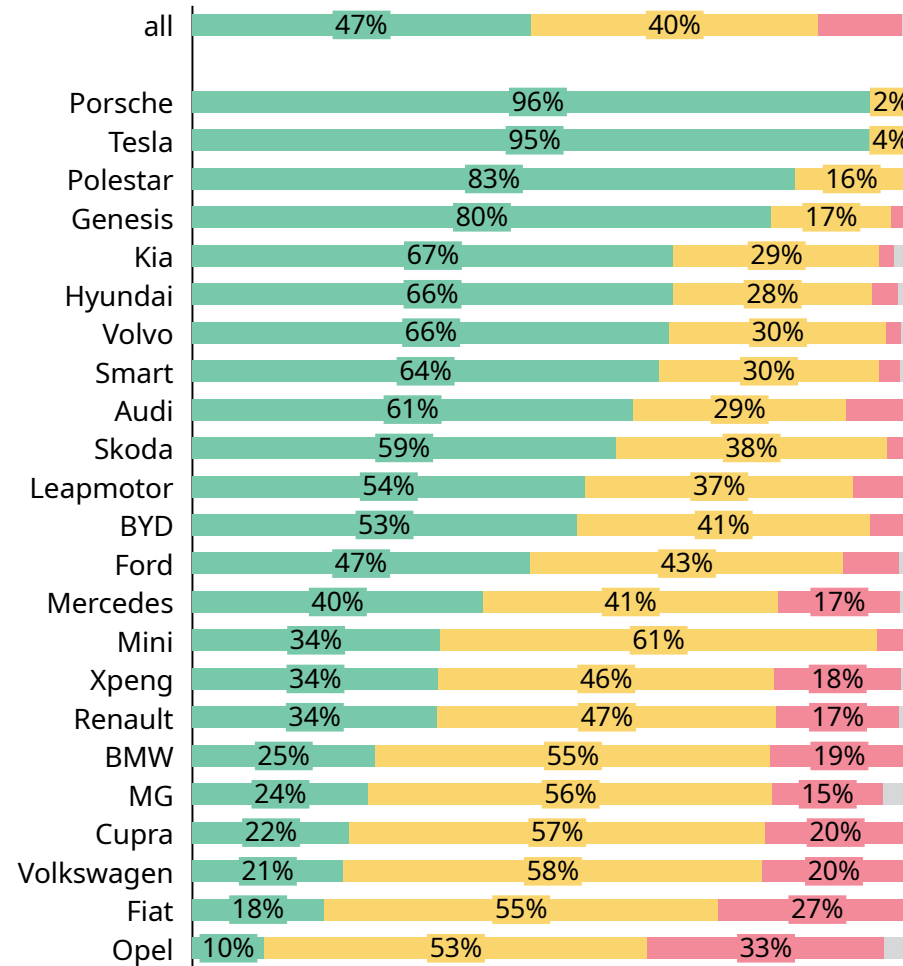
Of the 27 concepts assessed, the cable stowage concept ranks 24th. The weighted average value has decreased compared to 2025*.

* The weighted average of all responses for
1 = poorly developed
2 = need for improvement
3 = well developed

is a value of 2.36 points.

For comparison:

- 2025: 2.42 points
- 2024: 2.38 points
- 2023: 2.39 points
- 2022: 2.14 points



"What is your opinion on the maturity of the concepts implemented in your [brand] to accommodate the charging cables?"



N = 30 - 680

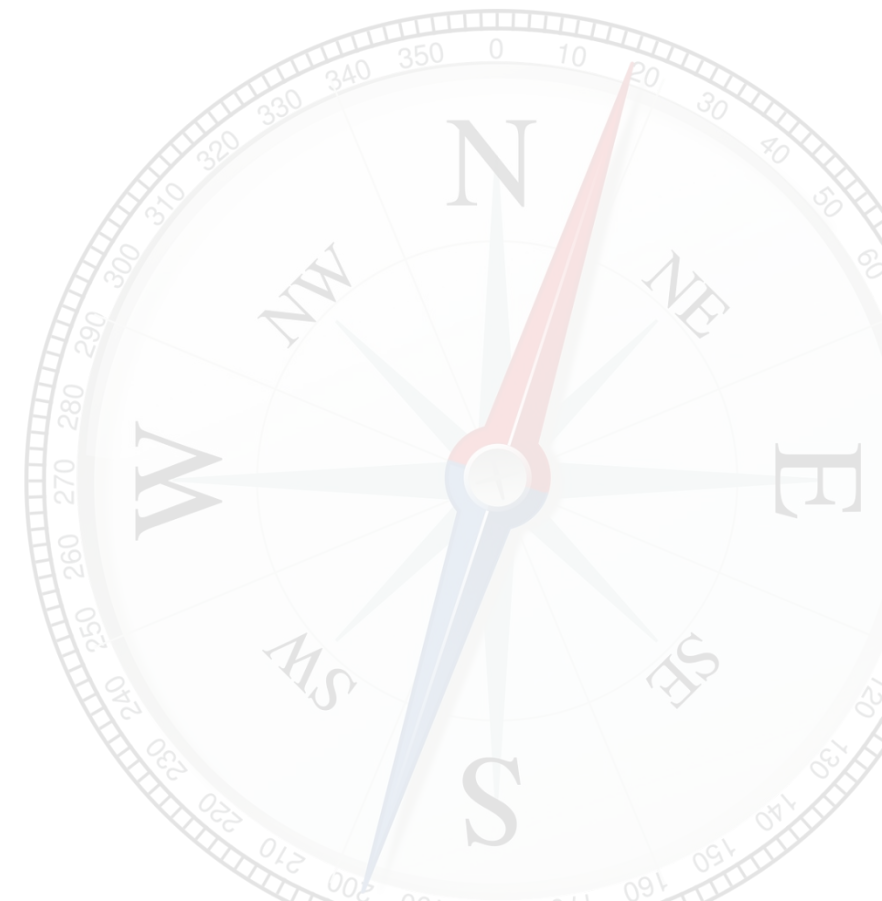
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Thermal Battery Management and Charging Curve Problems

The problems with the thermal battery management have strongly decreased by 9 percentage points compared to 2025.



Thermal battery mgmt.
usage = yes,
manually or yes,
automatically:
"Have you encountered
any issues with the
battery thermal
management?"
(any problem marked)

* N < 30

N = 12 - 411

Thermal Battery Management and Charging Curve

Concept Maturity

Of the 27 concepts assessed, the thermal battery management ranks 20th. The weighted average value has significantly increased compared to 2020¹.

1. The weighted average of all responses for
- 1 = poorly developed
 - 2 = need for improvement
 - 3 = well developed
- is a value of 2.07 points
- For comparison:
- 2020: 1.88 points
 - 2020: 1.72 points
 - 2020: 1.87 points
 - 2020: no data available



"What is your opinion on the maturity of the technical concepts implemented in your [brand] regarding thermal battery management?"

N = 30 - 680

Thermal Battery Management and Charging Curve Recommendations

More than a half of the statements ask for a button or a menu entry with which the battery conditioning can be started by the driver.

Thermal battery mgmt.
usage ≠ not possible:

"Do you have any recommendations to [your brand] on thermal battery management?"



N = 731



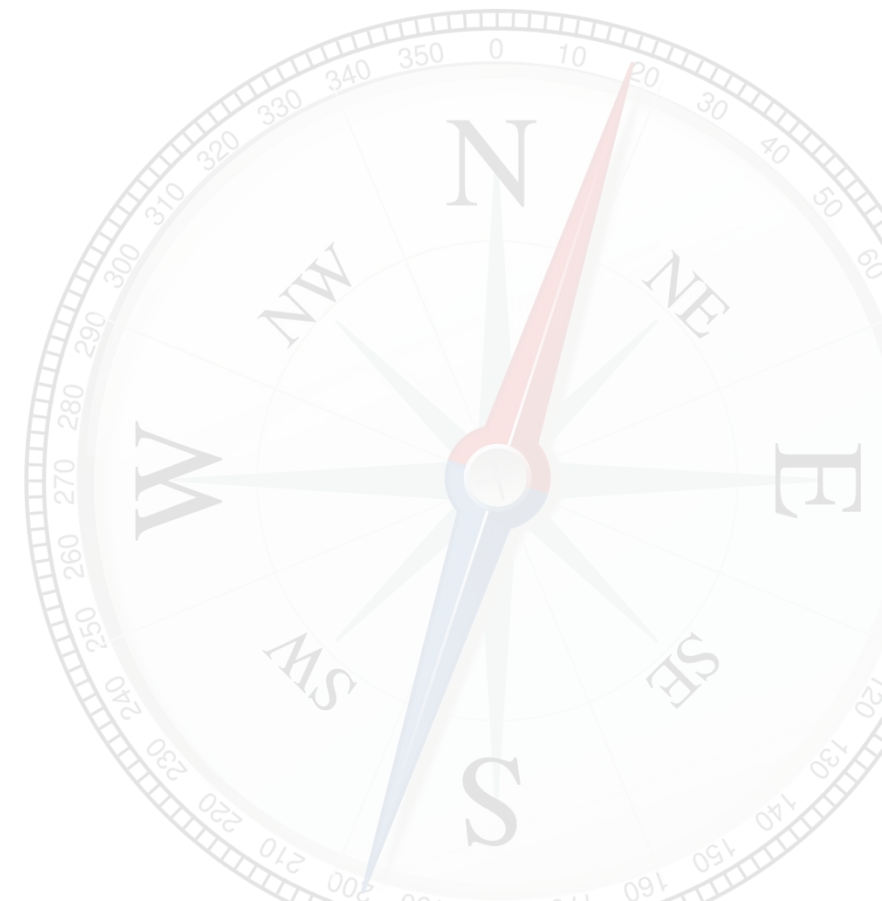
N = 731

For all AI clustered
verbatimms see study
dashboard

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- ▶ (4) **Survey Results**
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 - 8. **Overall Rating & Recommendations**

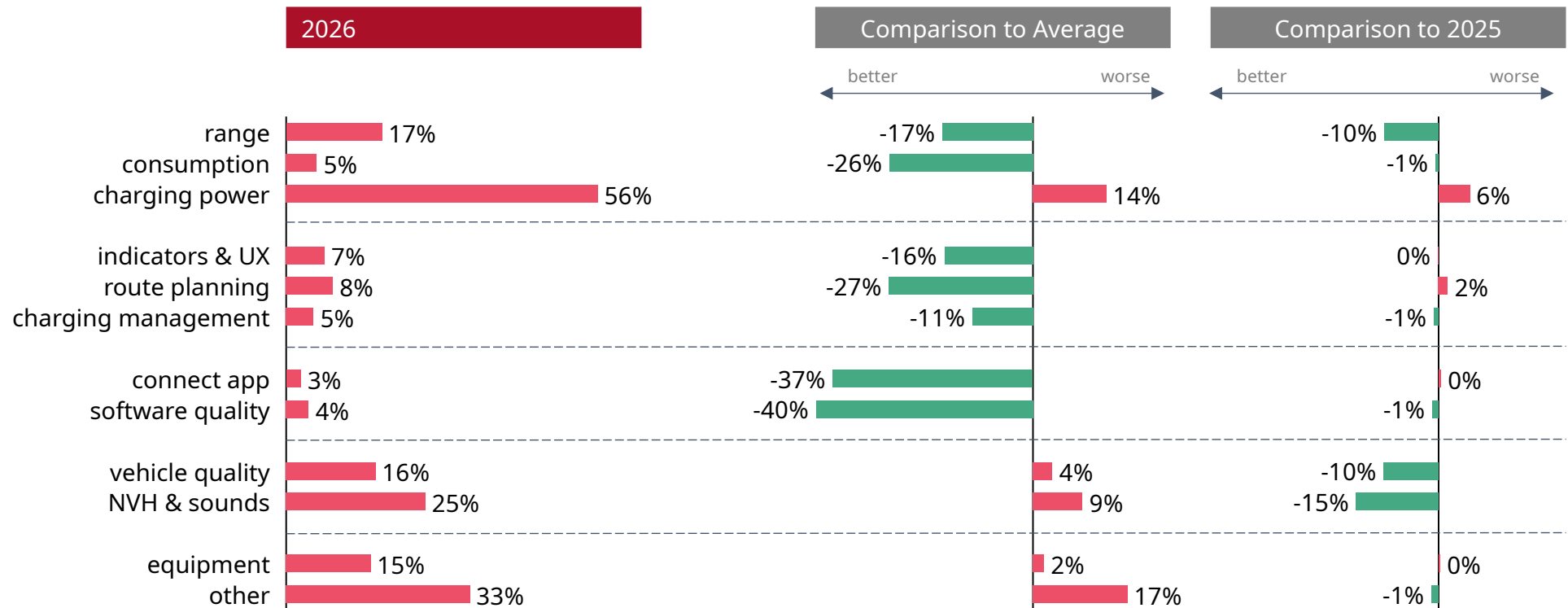


Summary

Prioritized Needs for Improvement: Tesla

Impressive performance in most EV related areas. Strong need for improvement in charging power, quality and NVH. The majority of "other" mentions refer to driver assistance systems.

"In summary, what areas do you believe [your brand] should prioritize for improvement?"
(multiple answers possible)



N = 350

Summary

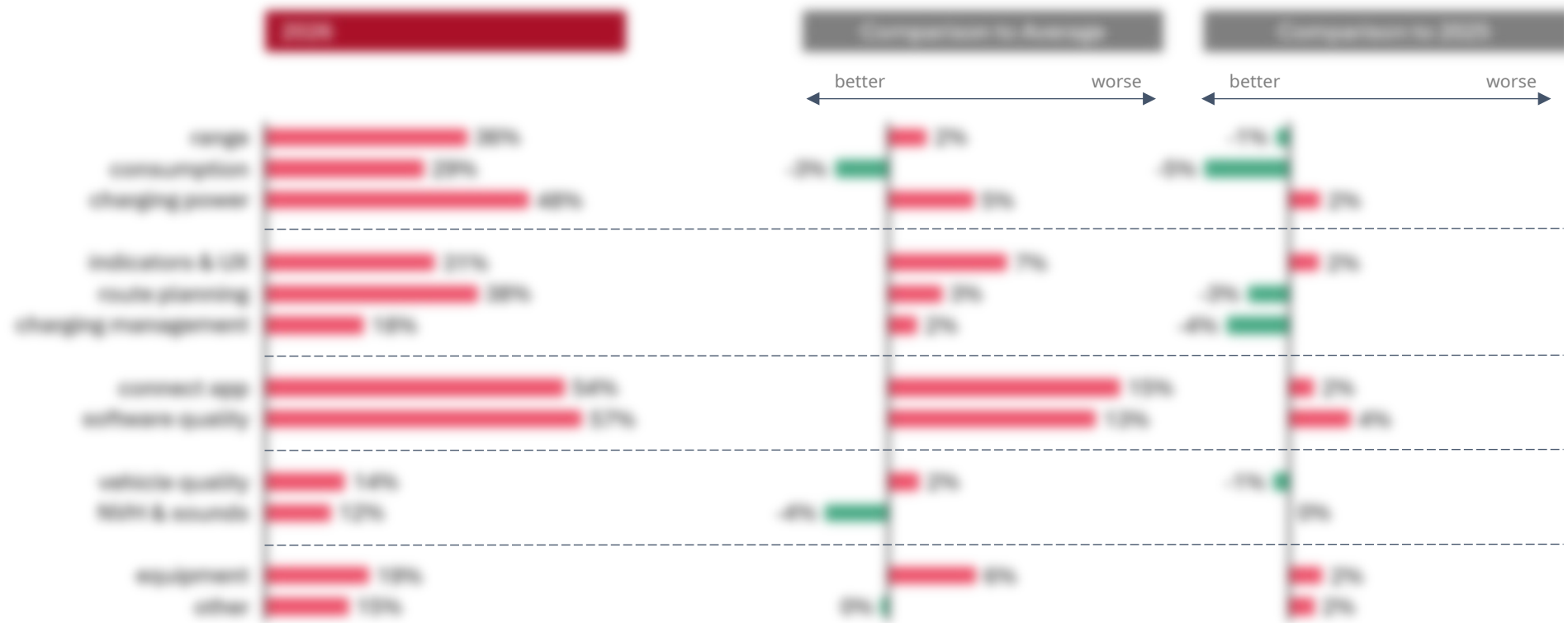
Prioritized Needs for Improvement: Volkswagen

Overall, below average performance with need for improvement in many areas. Thanks to the ID.7 improvements are visible compared to 2025.

"In summary, what areas do you believe [your brand] should prioritize for improvement?"
(multiple answers possible)



(only ID.x)



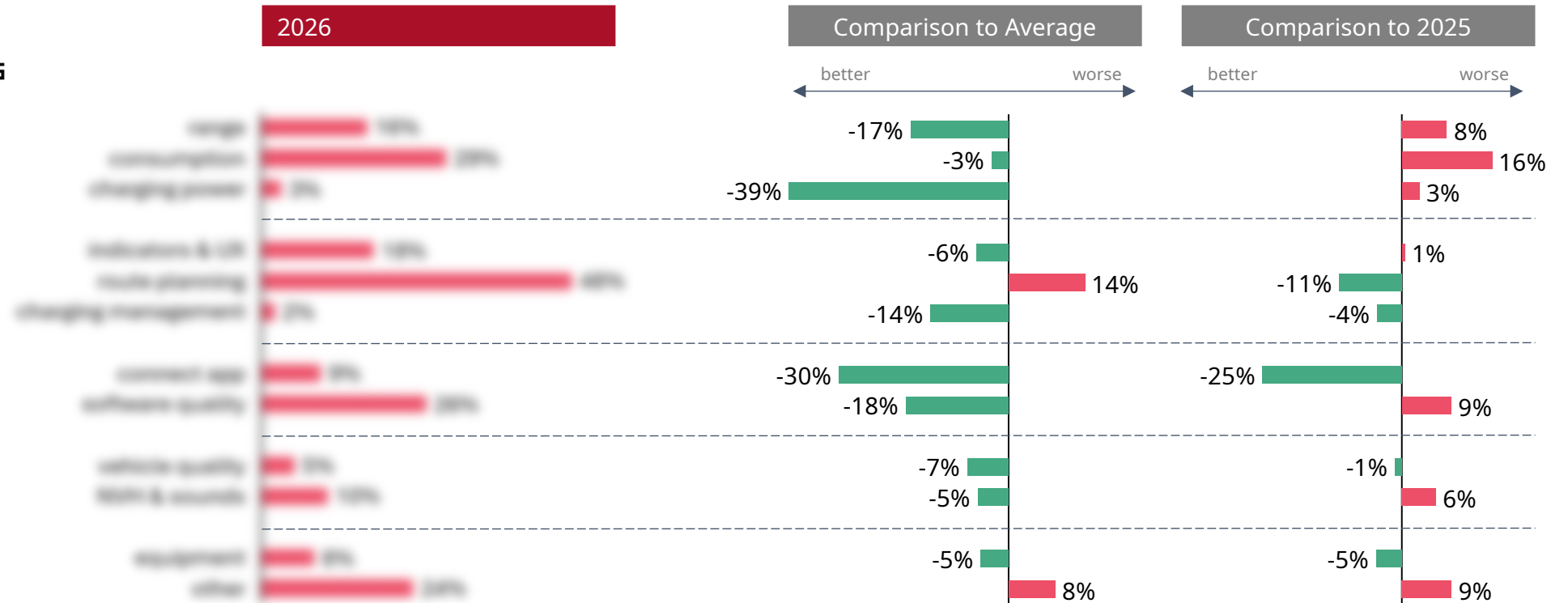
N = 680

Summary

Prioritized Needs for Improvement: XPeng

Strong above average performance, but need for improvement regarding route planning.

"In summary, what areas do you believe [your brand] should prioritize for improvement?"
(multiple answers possible)



N = 97



SCALE YOUR USER
SCALE YOUR BUSINESS

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