



# CPO / eMSP Charging Services Study 2026

German Charging Services From the EV Driver's Perspective

Press Handout  
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USCALE GmbH  
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# Management Summary

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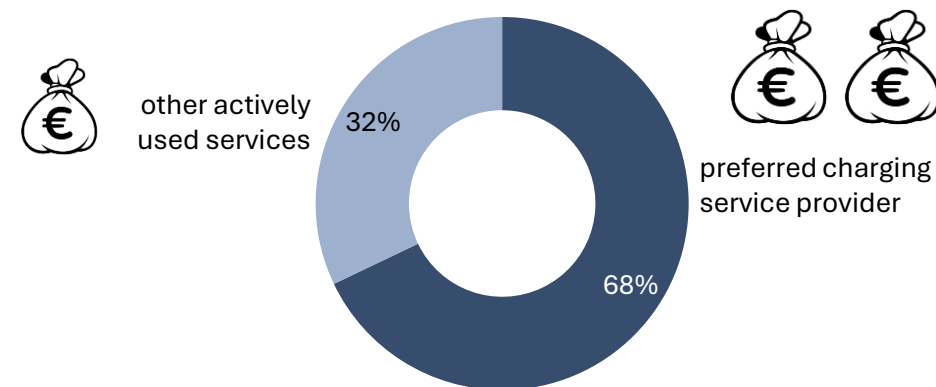
## Becoming the preferred provider is a must

Two-thirds of charging sessions are carried out using the preferred charging service.

The preferred service therefore receives roughly two-thirds of revenue, while the other actively used services share the remainder.

The goal for every provider must therefore be to become the preferred provider.

Usage of the preferred charging service



“How often do you use [preferred charging service]?”

# Management Summary

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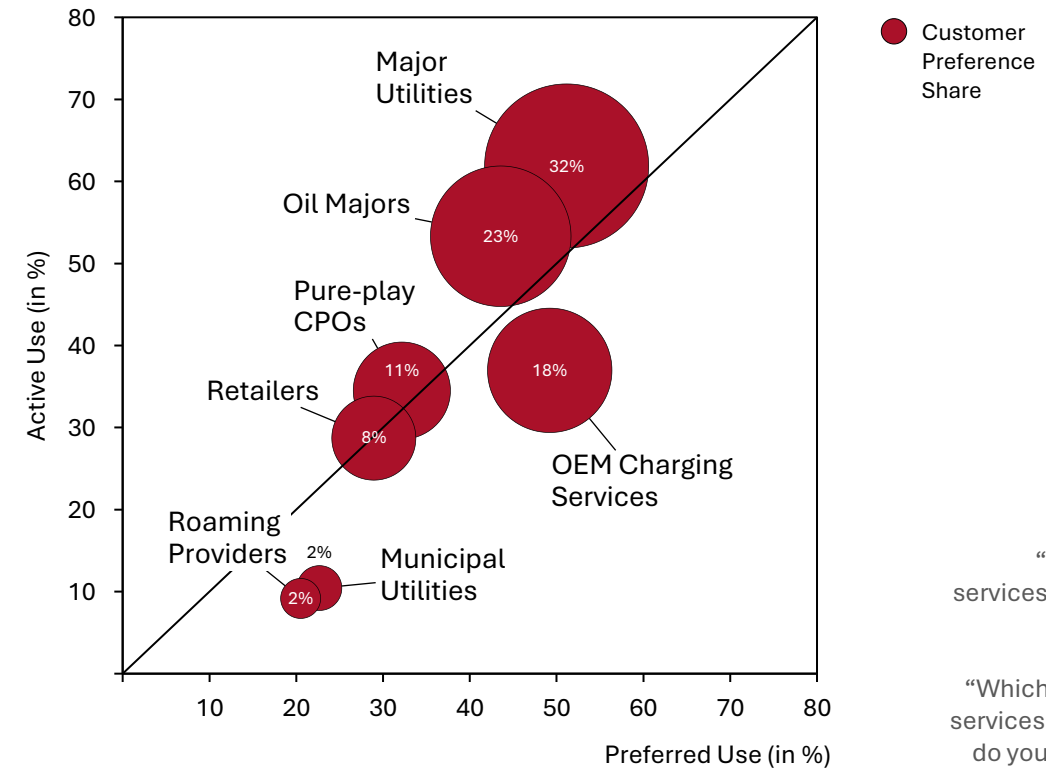
## Utilities lead, oil majors follow

Utilities still account for the largest share of customer preference, followed by the oil majors. OEM charging services perform surprisingly strongly in third place.

Pure-play CPOs trail well behind in fourth place among non-Tesla drivers.

Retailers are catching up, while municipal utilities and non-OEM roaming providers remain niche players.

Customer preference shares:  
(w/o Tesla drivers)



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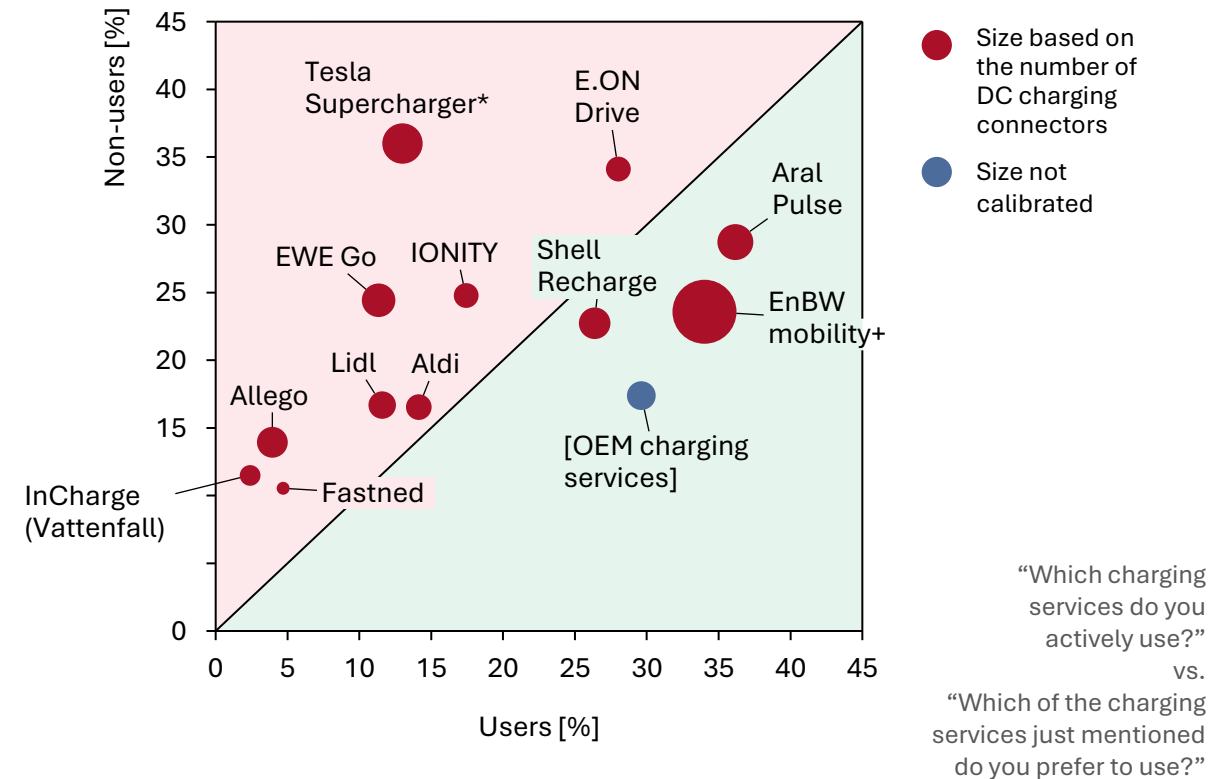
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## Non-user to user ratios vary widely by provider

Across all providers, there are 1.2 non-users who know the provider for every user. Behind this average are large differences.

OEM services, EnBW mobility+, Aral pulse and Shell Recharge have about as many or more users than non-users. For EWE Go, IONITY, Allego and others, it is the other way around.

Conversion of non-users to active users:



\* Non-Tesla drivers

# Management Summary

## 4

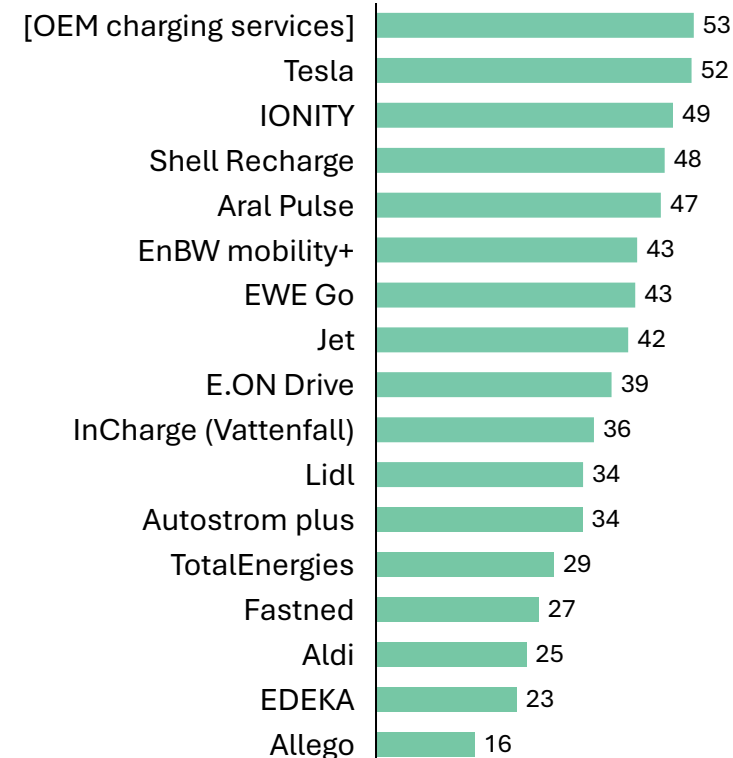
### High willingness to recommend

Eight of the 17 providers shown achieve a very high NPS of over 40 points. OEM charging services and Tesla lead, closely followed by IONITY, Shell Recharge and Aral pulse.

For comparison:

The average NPS for the German energy industry is 16.8 points (as of August 2026, source: npsbench.com).

### Net Promoter Scores (NPS):



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

# Objective

## Initial situation:

- 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.
- Charging services only generate reliable revenue if they are actively used and customer loyalty is strong, i.e. if the respective service is the EV driver's preferred service.

## Questions:

- Which offerings are actively used and preferred, and how are market shares and trends developing? How do drivers choose their preferred service, and what keeps them loyal afterwards?
- At which stage, from unaware to preferred, does an offering gain or lose drivers, and why? Conversely: How can providers move EV drivers from one stage of the funnel to the next?
- How do users and non-users perceive eMSP and CPO brands? Does this perception match the intended positioning?



## Methodology and target group

# Target group

### Survey:

- Target group: BEV owners who charge publicly
- Method: Online survey (CAWI)
- Market: Germany
- Recruitment: Social media, access panel
- Interview length: 15 to 20 minutes
- Field phase: July 2026

### Sample:

- Total: N = 2,507
- of which:
  - Access panel: N = 2,002 (80%)
  - Social media: N = 505 (20%) \*

\* Participants from the social media panel are not representative of the majority of EV drivers today. However, they are vocal on social media and were therefore included as a comparison group.

