Customer Insights on eMobility

Multi-Client Study Portfolio 2026

USCALE GmbH
www.uscale.digital

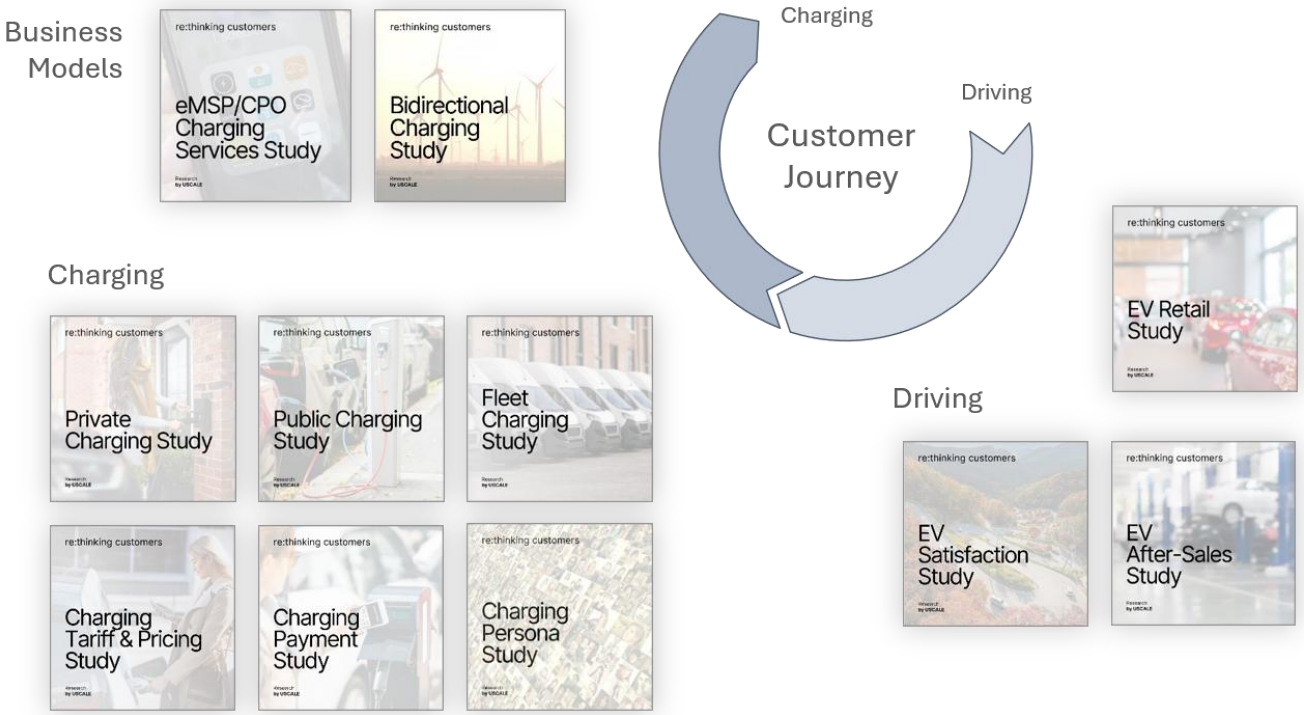
Studies on the entire Eco-System

Ad hoc and multi-client studies covering the entire customer journey

USCALE conducts **ad hoc studies** on electric mobility. Our clients benefit from our extensive industry experience.

In addition, we have been offering **multi-client studies** on all touchpoints of the e-mobile customer journey for eight years.

USCALE Multi-Client Studies:



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Understanding Different Markets

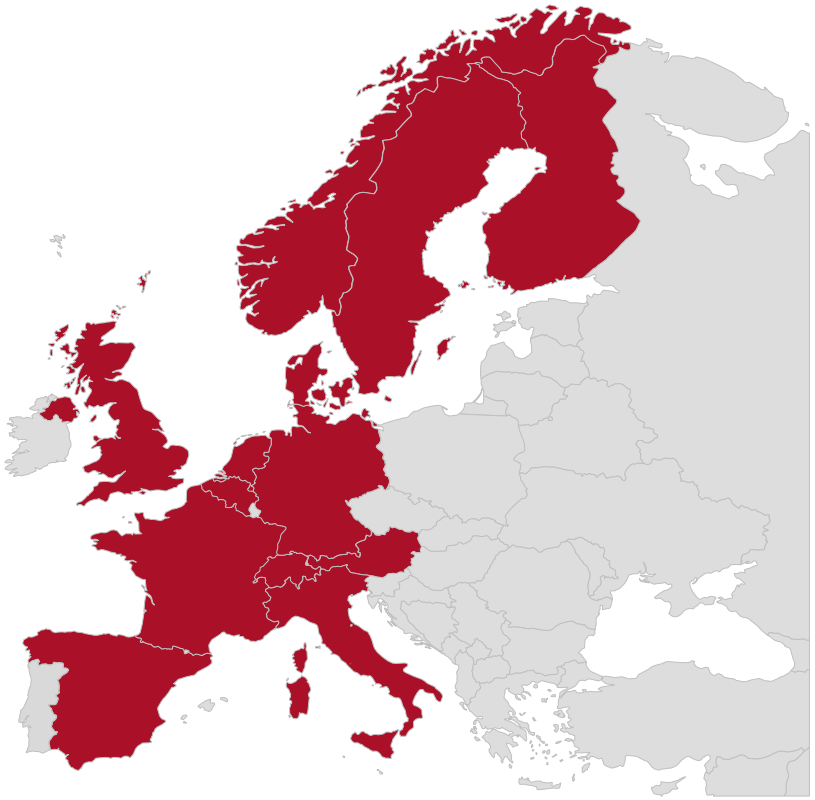
User studies from key BEV markets

Charging habits vary from country to country. Key factors include driving behavior, living conditions, and the state of public infrastructure.

USCALE offers charging studies for more than 12 countries and is happy to expand these to include additional countries upon customer request.

Driving and charging behavior also influence perceptions of and expectations for the vehicles.

Country coverage for charging studies:



additionally:

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Studies for All eMobility Stakeholders

100% focus on the eMobility industry

Our focus on the eMobility industry is convincing. We have been working successfully with the most important providers throughout the entire ecosystem for many years.

Working with automotive and charging technology manufacturers, eMSPs, CPOs and service providers in the industry gives us an excellent overview of the key issues facing the industry, which we incorporate into our projects for the benefit of our clients.

Our clients:

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Monitoring the Ramp-up

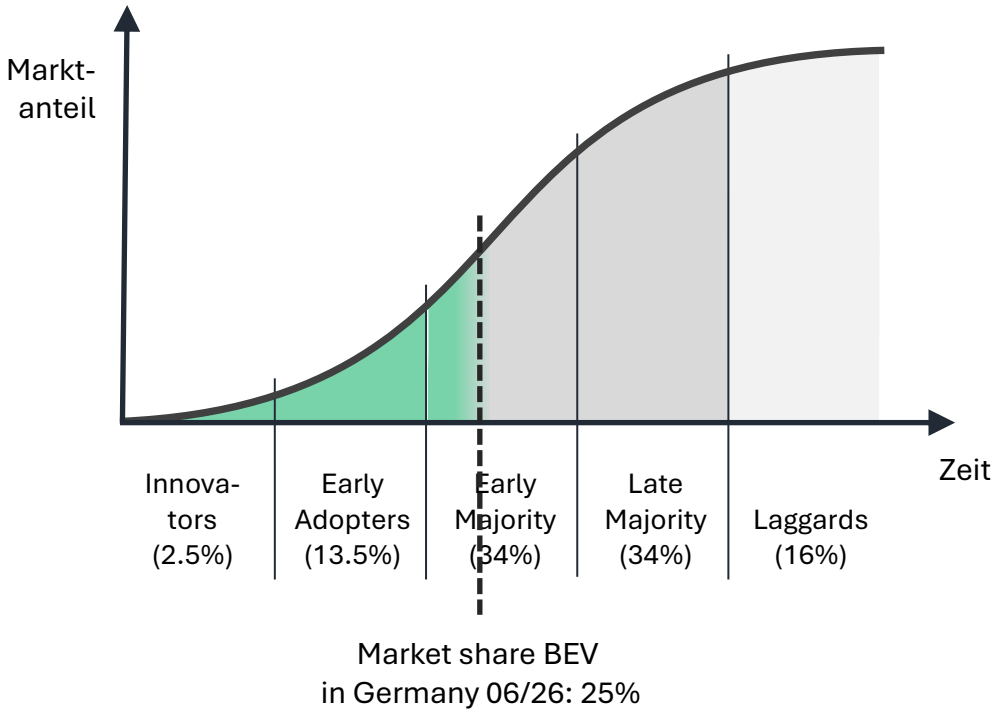
Regular survey of focus studies

The innovators and early adopters are now followed by the early majority, They have different motives, expectations and problems.

At the same time, the ecosystem is developing rapidly and thus influencing user behavior.

That is why we conduct most of our focus studies annually and split them into adopter segments within all of our studies. This allows trends to become apparent.

New user segments in the ramp-up phase:



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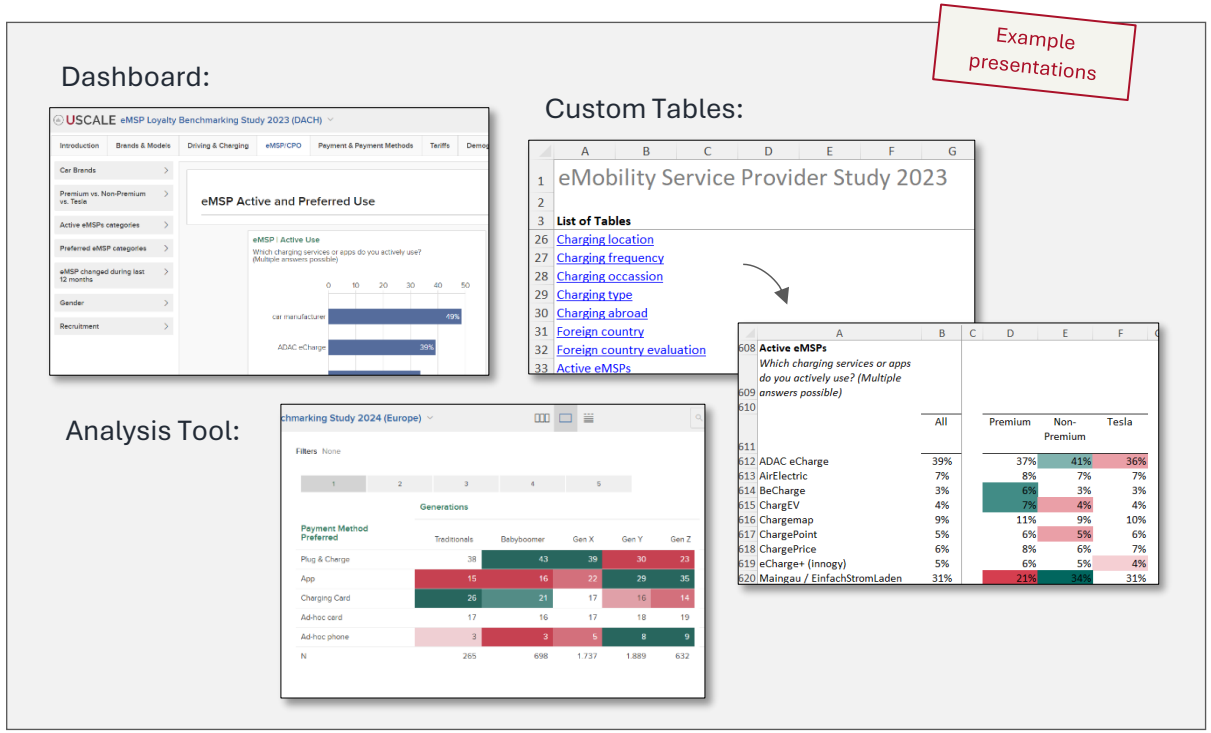
Deliverables

Report and Data Suite for unlimited custom analysis.

The scope and depth of the studies are considerable. That is why, in addition to a detailed PowerPoint report, we offer an optional Data Suite that includes a dashboard, an analysis tool, access to raw data, and the ability to generate custom tables.

pdf-Report:

Data Suite:



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STUDY EXAMPLE

USCALE

Customer Journey to the Charging Station

Utilization is King!

The **customer journey** to the charging decision depends on many factors. Specifically, users make a number of upstream decisions before finally deciding on a specific charging offering in a specific situation.

The combination of four USCALE charging studies maps the customer journey to the charging station.

If all factors of the offering are right, utilisation can be maximised.

Customer Journey

1. Preceding decision:

Which charging services are possible?

- Energy supplier
- Mineral oil company
- OEM...

2. Preceding decision:

Which charging tariff offer is best?

- low AC / low DC tariff
- with / without basic fee
- fixed / variable...

3. Preceding decision:

Which payment method is suitable?

- contract-based
- ad-hoc
- contract-based (P&C)...

▶ Situational charging decision:

Which charging offer is chosen in a specific charging situation?

- by price
- according to charging speed
- convenience...

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CPO/eMSP Charging Services Study

Initial Situation:

- The high number of eMSP and CPO offers is leading to fierce competition in a rapidly growing market.
- Charging services not only offer service providers sources of revenue, but also an important tool for customer loyalty. The prerequisite is that EV drivers use the service actively and - more importantly – preferred.

Question:

- Which eMSP or CPO offers do EV drivers (preferably) use? What are the market shares of the most important providers (groups)? What trends are emerging over time?
- What are the reasons for the preferences? What role do different types of tariff play? How can providers position themselves successfully?
- What influence do payment methods and pricing have on the selection decision?
- What differences are there between different target groups?

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CPO/eMSP Charging Services Study 2026

Key data

- Survey: July 26
- Sample: N = 2.507 drivers charging in public (DE)
- Markets: (more to be determined)

Methodological approach

- 360°-View of the most important CPO charging services:
  - Active/preferred use (incl. Usage Drivers)
  - Non-use/active rejection (incl. Reasons)
- Segmentation by adoption and charging types

Added value

- Benchmarking of the most important eMSP provider(groups) and CPOs.
- Derivation of market trends and shifts.
- Basis for differentiating eMSP offers for product managers.
- Basis for addressing target groups in marketing.

Study content

(for the complete list 2025: HERE)

Demographics and Segmentation

- Demographic characteristics, vehicle brand, company car
- Segmentation by charging profile, eMSP/CPO provider, tariff type, payment type

Customer Journey

- Search behaviour, sources of information used before choosing a provider, evaluation of sources
- Proactive approach by third parties
- Value for Money Priority

Use of eMSP or CPO Services

- Unprompted and prompted brand awareness
- Market shares: actively used vs. preferred charging services, usage scenarios, NPS, reasons for preferring each charging service
- Brand Health/Conversion Funnel: Attitudes and barriers to use among well-known but unused providers (prospective users, considerers, churners, rejecters)
- Influence and interactions of key performance characteristics (**CONJOINT**) on the selection decision: coverage, Plug&Charge capability, price, availability, vehicle integration
- Perceived price-performance positioning

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Charging Tariff & Pricing Study

Integration with the Payment Methods Study in consultation with our clients

Initial Situation:

- The market for charging tariffs is characterised by a large number of providers and therefore strong competition.
- As new customer segments enter electric mobility, the conditions and preferences of users are continuously changing.
- Providers must position themselves and differentiate. The question of the relevant decision criteria for the various user groups is becoming increasingly more important.

Question:

- What role does the price play? What influence do other tariff features have on the tariff decision?
- How high is the acceptance of tariff increases before users decide to switch to a different tariff?
- What differences are there between different target groups and depending on the other preceding decisions?

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Charging Tariff & Pricing Study 2025

Integration with the Payment Methods Study in consultation with our clients

Key data

- Survey: March 25, online
- Sample: N = 1,722
- Market: 🇩🇪

Methodological approach

- At the core of the survey is a CONJOINT analysis that asks about the influence of the most important price features on the chosen charging tariff.
- Other tariff features are asked using a KANO approach.
- Important segmentation on charging behaviour, payment and eMSP/CPO preferences are shown for the analysis.

Added value

- Basis for the development and differentiation of tariff offers for product managers and marketing.
- Simulator for the change in market share when certain tariff components are changed.

Study content

(for the complete list: HIER)

Demographics and Segmentation

- Demographic characteristics, vehicle brand, company car
- Segmentation by charging profile, eMSP/CPO provider type, tariff type, payment type

Customer Journey

- Search behaviour, sources of information used before tariff selection, evaluation of sources
- Proactive approach by third parties

Influence and Interactions of Tariff Features on Tariff Decisions

- Influence of individual features (**KANO**):
  Variable and dynamic tariffs depending on various criteria, base fee, term/cancellation period, coupling with bonus programmes, green or regional electricity
- Preferred feature values
- Loyalty and customer retention
- Interactions and willingness-to-pay (**CONJOINT**):
  AC, DC, roaming tariff, spread to ad-hoc, blocking fees depending on most important feature
- Combination with domestic electricity: current supplier, type of domestic electricity tariff, interest in combined contracts, motivation

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Public Charging Payment Study

Integration with the Tariff and Pricing Study in consultation with our clients

Initial Situation:

- There are over 1,000 eMSP and CPO offers in Germany, This leads to fierce competition in a rapidly growing market.
- At the same time, the range 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 authorization and payment methods do EV drivers use, or would they like to use? What 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 behavior? 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?

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Public Charging Payment Study 2025

Integration with the Tariff and Pricing Study in consultation with our clients

Key data

- Survey: 11/25, online
- Sample: N = 1,500
- Market: 🇩🇪

Methodological approach

- The study assesses the relevance of payment methods for the target group, their preferences, and possible interactions between payment methods and other criteria such as willingness to pay using a CONJOINT survey
- The survey focuses on customer segmentation using payment personas

Added value

- Basis for the development and differentiation of payment options at charging stations.
- Influence of payment methods and means on willingness to pay, loyalty, and potential churn
- Optimization of the CPO's own billing landscape

Study content

(for the complete list: HERE)

Demographics and Segmentation

- Demographic characteristics, vehicle brand, company car
- Segmentation by company car and eMSP/CPO provider type

Customer Journey and Decision Criteria

- General usage behavior of payment methods
- Use and usage history of payment methods at charging stations (plug & charge, charging card/RFID, charging app, ad hoc in general), detailed evaluation of methods, decision criteria
- Deep dive into various ad hoc methods, detailed evaluation of methods, decision criteria, pre-authorization, display preferences
- Experience with various payment methods, problems, current preferences

Correlation between Payment method and Price

- Price elasticity depending on the payment method (conjoint), awareness of price-determining factors (ad hoc prices, variable prices, roaming prices, promotions and offers)

Deep dives

- Plug&Charge: experiences, reasons for low usage, relevance for vehicle choice
- Innovative payment methods: digital charging card, multi-contract in the vehicle, charging from the navigation app
- Charging receipt/charging history/billing: relevance, desired features

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Public Charging Study

Initial Situation:

- Demand for public charging infrastructure and expectations of providers are on the rise.
- To develop and roll out the right charging solutions, providers need to understand why users choose particular charging locations in specific situations. Semi-public charging facilities at workplaces and in retail outlets also play an important role in this regard.

Question:

- How and where do EV drivers charge their vehicles today? What criteria do EV drivers use to decide where to charge? What influence do charging prices, power output and other factors have?
- How is charging behaviour changing with the emergence of new segments of EV adopters and depending on home charging options?
- What problems do charging customers face today, for example with charging, apps and customer support? What needs do they identify?
- Are there differences between the target groups?

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Public Charging Study 2026

Key data

- Survey: August 2026, online
- Sample: N = 1.151 drivers charging in public
- Market: 🇩🇪

Methodological approach

- At the core of the survey are four situational CONJOINT analyses:
  - Near home,
  - Destination (short-stay),
  - Destination (long-stay),
  - Motorway,
- which evaluate the influence of the most important service features on the charging option chosen in each situation.
- For the analysis, the data is evaluated separately according to key segments related to charging behavior.

Added value

- Basis for the development and differentiation of payment options at charging stations.
- Simulator for estimating changes in market share resulting from changes in specific product characteristics.

Study content

(for the complete list: HERE)

Demographics and Segmentation

- Demographic characteristics, vehicle brand, company cars, living situation
- Segmentation by charging types and locations, payment method, charging services used
- Company cars: Fleet management, cost coverage, car policy, wallbox financing

Customer Journey and Experience:

- Charging Planning / Route Planning: Systems Used
- Services: Charging App Features, Pain Points with the Charging App, Surrounding Services, Reservations
- Experience: Charging Anxiety, Charging Problems, Severity of Problems, Support Experience, Satisfaction

Influence and Interactions of Service Features on Situational Charging Decisions

- Charging Behavior: Charging locations used, frequency, reasons for the most recent charging decision (opportunity, planning, urgency, routine, cost), charging service usage and preference
- Interactions and Willingness-to-Pay (CONJOINT) in Four Use Cases: Distance, charging power, number of charging points, utilization, price, parking fee/refreshments

Charging in semi-public spaces: employer-provided charging, retail charging

- Employer-provided charging: charging options, billing, charging duration, availability, regulations
- Retail charging: influence on retailer choice, shopping/charging time mismatch, problems

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Private Charging Study

Initial Situation:

- While charging at home is and is likely to remain the most important charging location for EV drivers, the number of providers on the market is increasing.
- This increases the pressure on manufacturers and importers to stand out from the competition with attractive and tailored offers and to withstand the pressure to consolidate.
- For private charging, there is a lot of potential for providers to offer new products and services beyond a wall charger.

Research Questions:

- How do EV drivers charge today?
- What information are buyers of private charging solutions looking for? Where do they buy or want to buy?
- What criteria are relevant to the purchasing decision?
- Are there differences between the target groups?

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Private Charging Study 2026

Key data

- Erhebung: Q3/26, online
- Sample: N = 800 per country, thereof:
  N = 400 BEV-Intender
  N = 400 BEV-Owner
- Markets:

Methodological approach

- The study provides a detailed analysis of the target group's driving and charging habits.
- The focus is on what charging technology electric vehicle drivers have at home and what they would recommend to others in hindsight - now that they have experience.
- In addition, electric car drivers were surveyed at length on their awareness of and perceptions of various brands

Added value

- Providers learn what information they need to reach which target group.
- The results show which criteria are decisive for purchasing decisions and which offers present the greatest sales potential.

Study Content

(for the complete list: HERE)

Respondents / Segmentation

- Demographic characteristics, vehicle make, company cars
- Segmentation by EV adopter groups, company cars and charging types (charging and driving behaviour, housing situation)

Charging Technology at Home

- Purchase process: information sources, purchase locations, satisfaction with information, purchase, implementation and operation phases
- Decisive purchasing criteria
- Charging technology used (wall charger / type, wall charger manufacturer, PV system, battery storage, energy management, etc.)
- Brand awareness (aided and unaided), brand impression and brand image

Charging Behavior at Home

- Charging frequency, charged energy shares, relevance of charging locations, charging occasions, charging types
- Charging problems, satisfaction with private charging solution (NPS), change requests in retrospect and loyalty
- Charging contracts at home (change as part of e-car purchase)

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Fleet Charging Study

Initial Situation:

- The electrification of fleets opens up significant growth and value creation potential for manufacturers, service providers, and energy companies within the e-mobility ecosystem.
- But the hurdles are high: requirements for availability, time and cost pressures, and high energy demands make the transition complex.

Research Questions:

- Where do companies stand in terms of electrifying their fleets? What are their perspectives on this, what goals are they pursuing, and what archetypes can be identified?
- What solutions are companies seeking? Which external partners do they collaborate with, which operating models do they choose, and what criteria do they use to make their selections?
- What requirements arise for integrating electric mobility into internal processes and systems (fleet management, energy, IT)?

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Fleet Charging Study 2026

Key data

- Survey: 04/26, online
- Sample: N = 1.213 Fuhrparkmanager und (Mit-)Entscheider zur Elektrifizierung
  - of which: N = ca. 340 ohne Elektrifizierungsabsicht
  - N = ca. 873 ohne Elektrifizierungsabsicht
- Market: Deutschland

Methodological approach

- In addition to fleet managers, other key stakeholders - such as CEOs, facility managers, energy managers, HR professionals, and other - were also surveyed.
- 360°-view on fleet charging

Added value

- Providers of charging technology and solutions gain insight into the pain points and needs of their target audience during various phases of implementation.
- Based on this insight, they can optimize their offerings and increase revenue.

Study Content

(for the complete list: HERE)

About the Company / Segmentation Characteristics

- Industry, number of employees, on-site situation, ownership/leasing, role of respondents
- Fleet size, vehicle types and uses, fuel cards
- State of electrification: status, challenges, planning horizon, investment strategy, current and target electrification levels, sources of information, reasons for not electrifying
- Charging Use Cases: Charging Locations by Vehicle Category, Charging for Guests, Employees, and Suppliers

Depot Charging

- Electrification Goals, Sought-After and Selected Charging Solutions, Existing and Planned Charging Points (AC/DC) (Non-Electrifiers: Reasons for Not Electrifying)
- Criteria for solutions and solution partners, purchase locations, procurement models, willingness to lease
- Charging management and integration into FPMS / EMS / ERP, relevance of bidirectional charging
- Requirements for home charging

Public Charging

- Charging cards and apps used; criteria and process for selecting a charging service
- Division of responsibilities between headquarters and drivers (trip, route, and charging planning); truck drivers' perspective: charging planning, procedures when charging stations are occupied, reservation requirements, etc.

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Bidirectional Charging Study

Initial Situation:

- Bidirectional charging is currently the focus of technical developments and political debates; V2H, V2G, and V2B are becoming increasingly important for the industry.
- Because grid expansion is lagging behind the growth of electric vehicles, bidirectional charging is becoming a key enabler for the expansion of e-mobility.
- With the recent EnWG reform, the regulatory framework for V2G is being implemented in Germany, and the first offerings are already available.

Research Questions:

- Which use cases for bidirectional charging are compelling? What are the drivers and barriers to adoption from the customer's perspective, and how large is the addressable market?
- How much are consumers willing to pay for V2X components, and what compensation do they expect?
- Who integrates whom in the V2X ecosystem, whom do EV and internal combustion engine drivers trust, and what differences exist between target groups and European markets?

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Bidirectional Charging Study 2026

Key data

- Survey: February 26, online
- Sample: N = 4,505 BEV drivers
  N = 6,672 ICE-drivers with varying willingness to purchase an EV
  Sample breakdown: V2G: 50%, V2H: 36%, V2B: 14%
- Markets:

Methodological approach

- Evaluation of the product-market fit as a take-rate equivalent. Determining the acceptance drivers and barriers for each use case.
- Willingness to invest or incentive expectation according to Gabor-Granger methodology.

Added value

- Product-market fit (readiness to subscribe) the use cases V2H, V2G, V2B.
- Prioritised levers for overcoming barriers to use.
- USPs for successfully marketing V2H, V2G, V2B to different target groups.

Study Content

(for the complete list: HERE)

Respondents / Segmentation

- Demographic characteristics (including gender, age, income)
- Living situation (single-family house/apartment building, places of residence), parking situation
- Driving and charging behaviour
- Charging technology used and electricity tariffs at home

Bidirectional Charging

- Use Cases: Vehicle-to-Home (V2H), Vehicle-to-Grid (V2G), Vehicle-to-Business (V2B)
- Net Value Added, Relevance, Product-Market Fit (for V2G, V2H, V2B) as take-rate equivalents
- Prioritized Drivers and Major Barriers (for V2G, V2H, V2B)

Willingness to Invest and Expected Returns

- Willingness to invest in V2H hardware and infrastructure; mental accounting for bidirectional investment
- Expected compensation and incentive models for V2G and V2B, including via the Gabor–Granger approach.

Implementation

- Selection of an implementation partner: criteria for vendor selection, trust in solution partners
- Integration: preferred operation, maximum discharge
- Expectations of car dealerships regarding consultation and implementation

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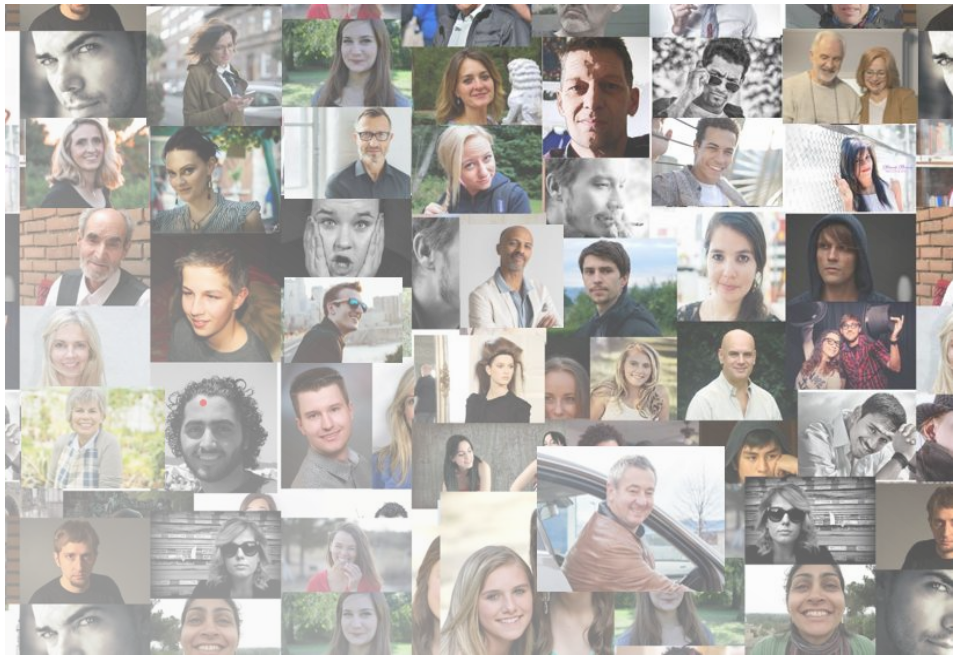
EV Charging Persona Study

Initial Situation:

- As market share grows, user groups are becoming increasingly diverse, and traditional target audience models are no longer sufficient.
- At the same time, the number of charging providers, services, and rate plans is growing significantly: To stay competitive, companies need a deep understanding of charging profiles and charging personas in order to tailor their offerings and communications to attractive segments.

Research Questions:

- How can charging profiles (charging types) be segmented based on residential, driving, and charging behavior (use cases, charging locations, charging occasions, mileage, etc.)?
- What values, attitudes, and mindsets regarding mobility, technology, and innovation distinguish EV drivers?
- What charging personas (“buyer personas”) emerge from this, and what requirements do these personas place on a CPO charging offering?
- Through which channels, and with what content and messages, can the individual personas be most effectively reached along their buyer journey?



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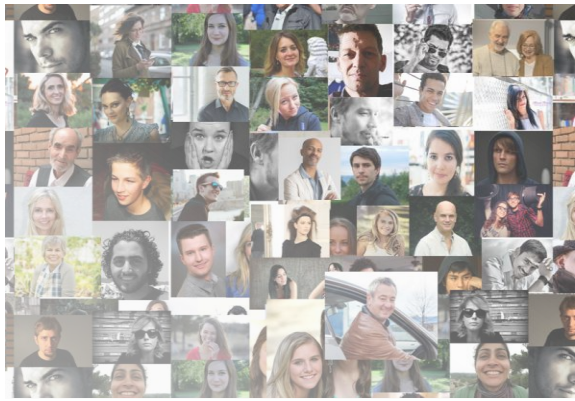
EV Charging Persona Study 2026



Key data

- Survey: April 2026, online
- Sample: N = 1.016 EV drivers
- Market: 🇩🇪

Methodological approach

- Creating charging profiles (“buyer profiles”) based on living, driving, and charging habits
- Creating charging personas (“buyer personas”) based on values, mindsets, and buying insights according to Revella
- Matching the personas with product and communication variables

Added value

- Detailed description of the target group segments for the product management and marketing of charging technology providers.
- Personas can be mapped to many current and all future USCALE studies via "Golden Questions“.

Study Content

(for the complete list: HERE)

Creating Charging Profiles („Buyer-Profile“)

- Charging profile and detailed charging behavior, e.g., charging locations, relevance of charging locations, reasons for charging
- Usage context / mobility behavior, e.g., mileage, usage situations, vehicle segment, living, parking, and work situations
- Demographic characteristics, e.g., gender, age, household, educational attainment, income, EV experience

Creating Charging Personas („Buyer-Persona“)

- General values according to Schwartz, tech affinity, openness to innovation, mobility mindset (role of the car, EV motivation), home tech/energy setup affinity, brand affinity
- Buying insights characteristics according to Revella regarding CPO preference decisions (Priority Initiatives, Success Factors, Perceived Barriers, Decision Criteria, Buyer Journey)

Matching personas with product variables

- Matching with preferred CPO/eMSP charging services, pricing models, home charging solutions, and future features (e.g., V2X)
- Matching with the buyer journey (information sources, type of information, purchase decision criteria), media usage (channels, media, topics), and charging profiles to derive communication briefings for each persona

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EV Adopter Persona Study

Initial Situation:

- As the electric vehicle market grows, drivers of internal combustion engine vehicles are becoming an increasingly diverse group of potential EV adopters. Traditional target audience models for electric vehicles fall short; segmentations for home charging technology are entirely lacking.
- To be successful, companies must tailor their products, sales, and communication specifically to adopter profiles and EV adopter personas.

Research Questions:

- How can charging profiles be segmented based on living, driving, and charging behaviors (use cases, charging locations, charging occasions, driving range, etc.)?
- What values, attitudes, and mindsets regarding mobility, technology, sustainability, and innovation shape the willingness to switch to an EV?
- What EV adopter personas emerge from this, and what requirements do they place on vehicles and charging technology?
- Through which channels, and with what content and messages, can the individual personas be most effectively reached along their buyer journey?

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EV Adopter Persona Study 2026

Key data

- Survey: June 2026, online
- Sample: N = 1.066 ICE drivers
- Market: 🇩🇪

Methodological approach

- Creation of adopter profiles (“buyer profiles”) based on living, driving, and usage situations, as well as the potential for home charging.
- Creation of EV adopter personas (“buyer personas”) based on values, mindsets, and buying insights according to Revella regarding the EV purchase decision.
- Matching the personas with offering and communication variables (vehicle/powertrain offerings, home charging options, channels, messages).

Added value

- Detailed description of EV adopter segments for product management, business development, sales, and marketing, including key requirements for product and home charging technology, as well as preferred channels per persona..

Study Content

(for the complete list: HERE)

Creating Charging Profiles („Buyer-Profile“)

- Driving and usage profile, e.g., mileage, usage scenarios (commuting, leisure, vacation), vehicle segment, household vehicle fleet, living, parking, and work situations
- Potential for home charging, e.g., parking situation, possibility of installing a wallbox, existing energy setup (PV, storage, heat pump), and previous experience with electric mobility
- Demographic characteristics, e.g., gender, age, household, educational attainment, income, EV experience

Creating Charging Persona („Buyer-Persona“)

- General values according to Schwartz, affinity for technology, openness to innovation, mobility mindset (role of the car, sustainability), affinity for home tech/energy setup, brand affinity
- Buying insights characteristics according to Revella regarding CPO preference decisions (Priority Initiatives, Success Factors, Perceived Barriers, Decision Criteria, Buyer Journey)

Matching personas with product variables

- Matching personas with offering variablesMatching with EV product and offering options (range, pricing and financing models, home charging technology including wallbox, home electricity rates, V2X options, and complementary services)
- Matching with the buyer journey (information sources, type of information, purchase decision criteria), media usage (channels, media, topics), and adopter profiles to derive clear product requirements and communication briefings for each persona

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EV Satisfaction Study

Initial Situation:

- Compared to combustion engines, which have been optimized for over 100 years, battery electric vehicles are still in their infancy.
- To survive the tough competition, manufacturers and importers must quickly adapt their vehicle concepts to the new target group.

Research Questions:

- What new use cases result from the electric drive? What are the resulting requirements?
- Which e-specific features are particularly relevant and how do they need to be designed?
- How do EV drivers rate the concepts? What are the strengths and weaknesses of the various brands?
- What recommendations do they have for the various manufacturers? What can manufacturers learn from their competition?

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EV Satisfaction Study 2025

Key data

- Survey: May-July 25, online
- Sample: N = 5.004 (DACH)
- Markets:

Methodological approach

- The study asks about the use of EV-specific features.
- EV drivers report on their usage habits, problems encountered during use, their assessment of the maturity of the concepts, and provide recommendations for further development.

Added value

- Identification of weaknesses in the previous design of proprietary e-vehicle-specific concepts
- Usage patterns for design
- Benchmarking: learning from competitors' mistakes and best practices
- Action required for specifications for future model years and vehicle generations

Study Content

(for the complete list: HERE)

Respondents

- Demographic characteristics (including gender, age, place of residence, income)
- Vehicle use (e.g. make, model, age, mileage, company car)

Segmentation

- Splits by vehicle brand / premium vs, non-premium, private vs, company cars

Driving-related Features (Usage, Problems, Concept Maturity)

- Driving: Range, ECO mode, recuperation, driving and functional noises
- Displays: SoC, remaining range, energy flow, other displays, etc,
- Navigation: features used, route and charge planning, charging station search
- Charging: Charging power, charging settings, charging management (start, monitoring, stop), thermal management, charging problems, charging cable storage, charging port position
- Heating, air conditioning, pre-conditioning

Remote/Connect App (Usage, Problems, Concept Maturity)

- Installation, registration, updates
- Functions used, reasons for non-use, operating and other problems

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Realization 2026 depends on customer inquiries

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EV Retail Study (New Cars)

Initial Situation:

- After the early adopters, the early majority segment, which has higher expectations, is now switching to Evs.
- The purchasing process for EVs differs from that of a combustion car in many respects. Retailers must therefore adapt to the changed requirements in order to grow with the market.

Research Questions:

- What information do EV buyers need?
- What expectations do they have of websites, car dealers, test drives, configurators and processes?
- What are the strengths and weaknesses of the different brands?
- What does this mean for the sales organizations of manufacturers and importers and their marketing? How do websites, processes and dealer training need to be adapted?
- What are the differences between target groups?

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EV Retail Study 2025 (New Cars)

Key data

- Survey: June-July 25, online
- Sample size: N = 2.063 shoppers and owners (max. 24 months after take-over), thereof:
  N = 1.561 BEV shoppers / owners
  N = 503 ICE shoppers / owners for ref.
- Market: 🇩🇪

Methodical approach

- BEV buyers and young owners are asked about their experiences throughout the entire purchase funnel (information gathering, purchase process, handover and follow-up).
- Additionally, ICE buyers and shoppers are surveyed for reference.

Added value

- KPIs for relevant retail processes
- Requirements for the design and optimization of brand websites, sales processes (consulting, test drive, contracts, etc,)
- Input for dealer training

Study Content

(for the complete list: LINK)

Respondents

- Demographic characteristics (including gender, age, place of residence)
- Vehicle use (e.g. make, model, age, mileage, company car, 1st/2nd car, EV experience, charging behaviour)
- Segmentation of all variable by premium / non-premium brands and ICE for reference

Orientation and Information Phase

- Brand loyalty, interest in used and Chinese brands
- Information sources, used purchase and comparison portals

Purchase and post-purchase Phase (Satisfaction, Needs)

- Purchase funnel: brand-specific interest (cross-shopping, brand loyalty)
- Manufacturer and dealer websites
- Sales advice, test drives, test charging, configuration
- Decisive brand / vehicle criteria for purchase, impact of cost types, purchase location, acquisition, other contracts
- Vehicle handover and follow-up, willingness to and relevance of Google reviews
- NPS brand dealers and assessments for all process steps

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EV Retail Study (Used Cars)

Initial Situation:

- Used cars are an essential element of a successful ramp-up of electric mobility.
- The return of many leased vehicles could provide the necessary impetus for the used car market. However, interested buyers are noticeably holding back, so that the used car market is only slowly getting going. This, in turn, is also slowing down the new car market.

Research Question:

- Who are used car BEV buyers? What do they expect? What information do they need? How do they differ from buyers of new EVs and buyers of combustion engine vehicles?
- What is holding potential buyers back from purchasing a used EV? Is it really just cost-related and technological aspects?
- What can dealers do to overcome this reluctance?
- Are there differences between different sub-target groups?

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EV Retail Study 2025 (Used Cars)

Key data

- Survey: June-July 25, online
- Sample Size: N = 2.528 BEV shoppers and owners (max. 24 months after hand-over), thereof:
  N = 1.263 used BEV shoppers
  N = 1.265 new BEV shoppers as ref.
  + N = 532 used ICE shoppers as ref.
- Market: 🇩🇪

Methodical approach

- Used EV shoppers were asked about their experiences during the purchasing process, handover, and follow-up.
- Data from ICE shoppers and BEV new car shoppers is shown for reference.

Added value

- Basic understanding of BEV used car shoppers (information search, purchasing behavior, motivation, etc.)
- Prioritized levers for the successful marketing of used EVs for manufacturers and dealers

Study Content

(for the complete list: LINK)

Respondents

- Demographic characteristics (including gender, age, place of residence)
- Vehicle use (e.g. current make, model, age, mileage, company car, 1st/2nd car, EV experience, charging behaviour)
- Segmentation of all variable by premium / non-premium brands and ICE for reference

Orientation and Information Phase

- Information and advice needs vs. expertise on the part of providers
- Sources of information, shopping and comparison websites used

Purchase and post-purchase Phase (Satisfaction, Needs)

- Decisive brand/vehicle-related aspects for purchase decisions, influence of cost types, battery check, place of purchase, type of purchase, additional contracts, trust in providers
- Vehicle handover and follow-up, willingness and relevance of Google reviews
- Reasons for not buying: vehicle-related, cost-related, charging infrastructure-related issues, concerns about battery wear, spare parts supply, trust in technology, residual value development
- Expectations regarding range and charging behavior, charging infrastructure
- Options for dealers to overcome concerns

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EV After-Sales Study

Initial Situation:

- EVs require fewer workshop services, At the same time, they require software updates, EV drivers have more hotline needs and the cars need to be integrated into a new ecosystem.
- Manufacturers and workshops must therefore not only adapt to new technology, but also to the changing expectations of users.

Research Questions:

- What experiences do EV drivers have with the garage? How do the expectations of EV drivers differ from those of combustion engine drivers?
- How do the after-sales workshops and processes of the various brands perform?
- Where is there a particular need for action for which after-sales organizations of manufacturers and importers and their dealers?

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EV After-Sales Study 2024

Key data

- Survey: June / July 24, online
- Sample: N = 1,828 BEV drivers
  N = 410 ICE drivers for reference
- Markets: 🇩🇪

Methodological approach

- EV owners are asked about their experiences during the usage phase:
  - Repair requirements and workshop visits
  - Battery checks
  - Service hotline
  - Software updates
  - Use Digital

Added value

- KPIs for after-sales processes
- Benchmarking OEM brand performance against competitors
- Definition of requirements for after-sales processes
- Input for dealer training

Study Content

(for the complete list: HERE)

Respondents

- Demographic characteristics (including gender, age, place of residence)
- Vehicle use (e.g. make, model, age, mileage, company car)

Segmentation

- Vehicle brands
- Service preferences

Utilization phase

- Service and repair requirements, workshop visits
- Service processes: preferred contact and processing
- Experience with software updates (OTA)
- Experience with the service hotline
- Use of digital services, attitude towards data protection
- Relevance of battery checks

After-sales service satisfaction

- NPS brand workshop
- Evaluation of update processes, service hotline

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...other topics?

What other topics are you interested in?

We welcome all inquiries and are very open to adding additional studies to our portfolio.

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GENERAL TERMS AND CONDITIONS FOR THE PROVISION OF STUDY DATA by USCALE GmbH (06/2020)

Validity

Our terms and conditions shall only apply to entrepreneurs (§ 14 BGB), legal entities under public law and special funds under public law. Deviating or additional conditions of the customer are not binding for us, even if we do not object in individual cases, unless we expressly acknowledge them, In this case, they shall only apply to the respective individual contract.

Conclusion of Contract

1. Our offers are always subject to confirmation. The customer is bound to its order for two weeks from receipt by us.
2. We shall only accept orders and changes to orders once we have confirmed them. The receipt of an invoice by the customer and the performance of the service shall be deemed confirmation.

Delivery and Condition of the Study Data

1. We deliver the study data in the format agreed in the order confirmation, otherwise in a customary format. The customer must ensure that the technical and actual requirements for accessing and using the study data are met on its side. It is also the customer's responsibility to provide suitable software that enables the study data to be opened, administered and printed out properly.
2. The study data are statistically collected and evaluated data. The informative value of the study data and their range of variation depend on the size of the sample, its composition and the population. When using the study data, the customer must observe these boundary conditions. On this basis, the study data were researched with reasonable care. However, we cannot warrant that the information in the study data is accurate and complete. Nor do we warrant that the study data are suitable and correct for the concrete needs of the customer.

Right of Use for USCALE Multi-Client Studies

1. The customer receives the simple, non-exclusive right to permanently use the study data entrusted to the customer as follows:
   a. The customer may only use the study data for its own internal purposes.
   b. The customer is not entitled to modify or otherwise edit the study data.
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2. We may extraordinarily terminate the granted right of use if the customer violates these terms of use; as a rule, the customer is to be warned beforehand.
3. All copyrights, rights of use and other protective rights to the study data shall remain with us. If the customer becomes aware of an infringement or an announced infringement of intellectual property or other of our rights, the customer shall inform us immediately.

Reference

1. We may name our customer as a reference customer with representation of his logo, also on our website. For this purpose, the customer grants us a simple, spatially unrestricted, non-transferable right of use with regard to the name and trademark rights required for this purpose. The customer may object at any time with effect for the future.

Terms of Payment

1. The prices stated in our order confirmation shall apply otherwise our list prices valid at the time of the order shall apply. Our claims are due immediately and payable without deduction in Euro.
2. The customer shall only have the right to offset if its counterclaim has been legally established or is undisputed. This prohibition of set-off does not apply to a counterclaim due to a defect which is based on the same contractual relationship as our claim. The customer shall only be entitled to exercise a right of retention to the extent that its counterclaim is based on the same contractual relationship.

Liability for Damages and Reimbursement of Expenses

1. Our liability for damages and reimbursement of expenses for slight negligence, in particular due to breach of duties arising from the contractual obligation and tort, is excluded, unless we have breached an essential contractual obligation, i.e. an obligation the fulfilment of which is essential for the proper performance of the contract or the observance of which the customer may regularly rely on. In this case, our liability shall be limited to the typical contractual damage, the occurrence of which we had to reckon with when concluding the contract due to the circumstances known to us.
2. Typical contractual damage shall be damage of a maximum of € 10,000,00,
3. However, our liability for damages resulting from injury to body, life or health, for intent and gross negligence, for the absence of a guaranteed quality or in accordance with the Product Liability Act is unlimited.
4. The limitation period for claims of the customer for damages or reimbursement of expenses is one year. The statutory limitation of claims due to intent or gross negligence as well as injury to body or health or due to the Product Liability Act shall remain unaffected.

Final Provisions

1. German law shall apply to the exclusion of the UN Convention on Contracts for the International Sale of Goods (CISG), If the customer is a merchant, a legal entity under public law or a special fund under public law, the place of jurisdiction for disputes arising from and in connection with this contract shall be our registered office; however, we shall also be entitled to assert claims at the registered office of the customer.
2. Should individual provisions be or become invalid, this shall not affect the validity of the remaining provisions.

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