Excerpt
(Total report: ca. 135 pages)

eMSP/CPO Charging Services Study 2024

eMSP and CPO Services from the Customer‘s Point of View

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www.uscale.digital

Objective

Initial situation:

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

Questions:

- Which eMSP or CPO offers are EV drivers actively using and which one are they preferring? How high are the market shares of the most important providers (groups)? Which trends arise over time?
- What are the drivers and barriers for the preferences? Which role do tariff models play? How can providers position themselves successfully?
- Which influence do payment methods have on the selection decision?
- What differences are there between different target groups?

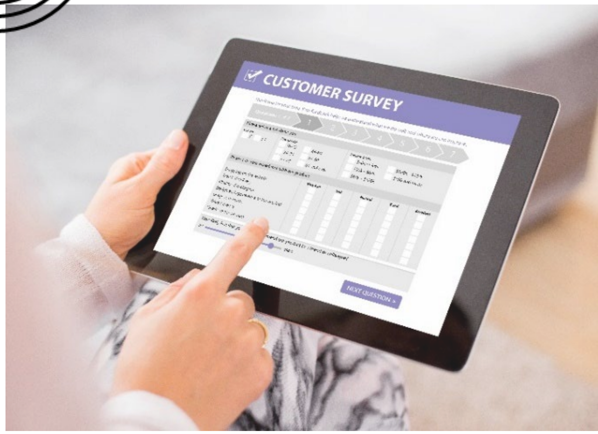
Target Group

Survey:

- Target Group: Owners of fully battery-powered electric vehicles (no plug-in hybrids) that charge at least occasionally at public charging stations
- Survey: Online-Survey (CAWI)
- Market: DACH
- Recruiting: Social Media, Access Panels
- Lenth of Interview: 15 - 20 min
- Field phase: Sept 2024

Sample size:

- total: N = 2,688
  thereof:
  - Innovators*: N = 1,738
  - Next Segment: N = 950



* The majority of participants from the Social Media Panel belongs to early EV adopters and more tech-savvy people. The report refers to this group as INNOVATORS.

The respondents from the Access Panels are generally less tech-savvy and switched to an EV later. The report refers to this group as the NEXT SEGMENT.

Background on the Recruiting for the Survey

Recruiting of Respondents

The eMobility market is in the ramp-up phase, i.e. the majority of current EV drivers belong to the group of so-called **innovators** and **early adopters** in the early phase. Only a small proportion of EV drivers come from the **early majority group**. *

Recruitment is based on the assumption that it is mainly innovators who can be reached in specialist forums and on **social media**, whereas the early majority can be reached in **access panels**. In recent years, we have implicitly assumed this connection. We now have very strong confirmation of this assumption from the USCALE persona study: The majority of participants from the social media panel are ‘eco-enthusiastic techies’, while the majority of access panel participants are spread across the other segments.

In order to achieve a distribution that is **as representative as possible**, a ratio of **65 to 35** between social media and access panel was selected for study participants.

In the report, the two groups represent different adopter groups (social media panel = innovators and early early adopters, access panel = later early adopters and early majority). If the results differ for both groups, they indicate a trend.

* This classification is based on Rogers' diffusion model (LINK).

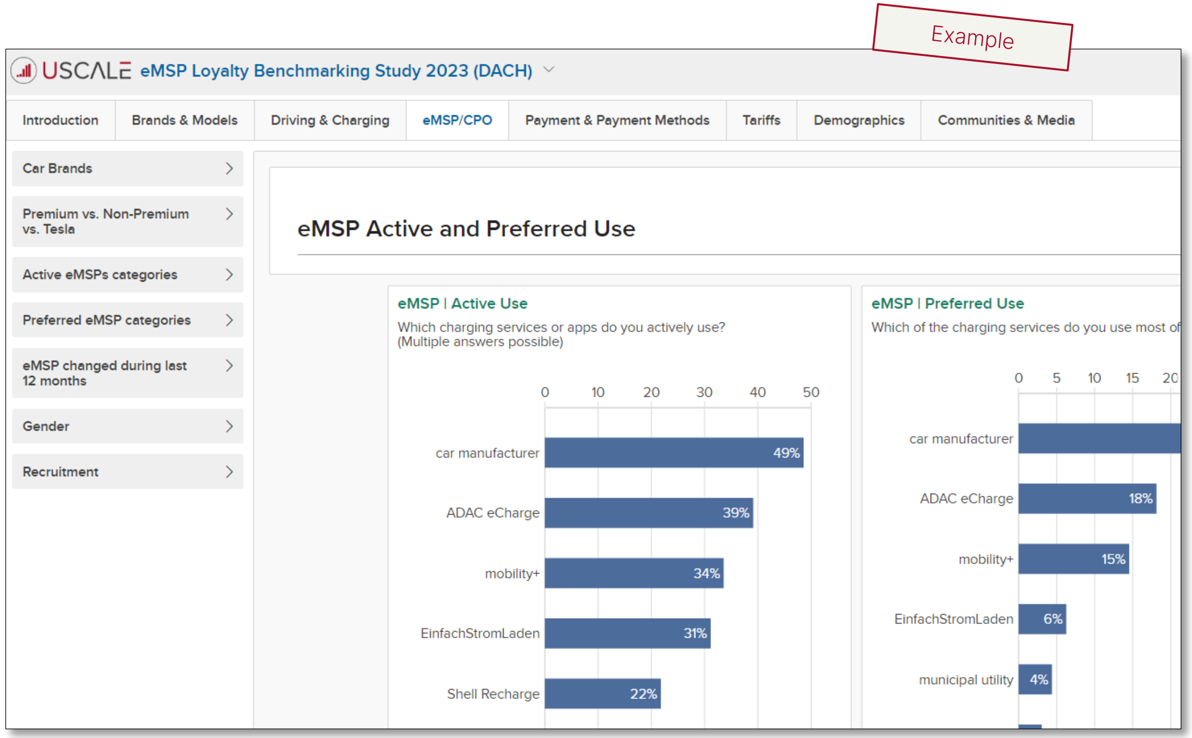
Dashboard for Individual Analyses

Deep dives on individual subgroups.

This document shows only a few selected breakdowns.

The associated dashboard allows the breakdowns to be carried out according to any other variables.

To register, please contact your USCALE study manager.

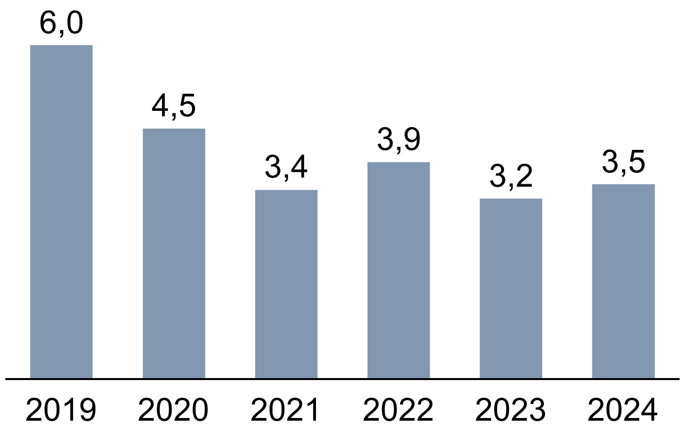


Content

Management Summary

1 High number of services used actively

Number of eMSP services actively used:



"Which charging services do you actively use?" (Multiple answer possible)

Management Summary

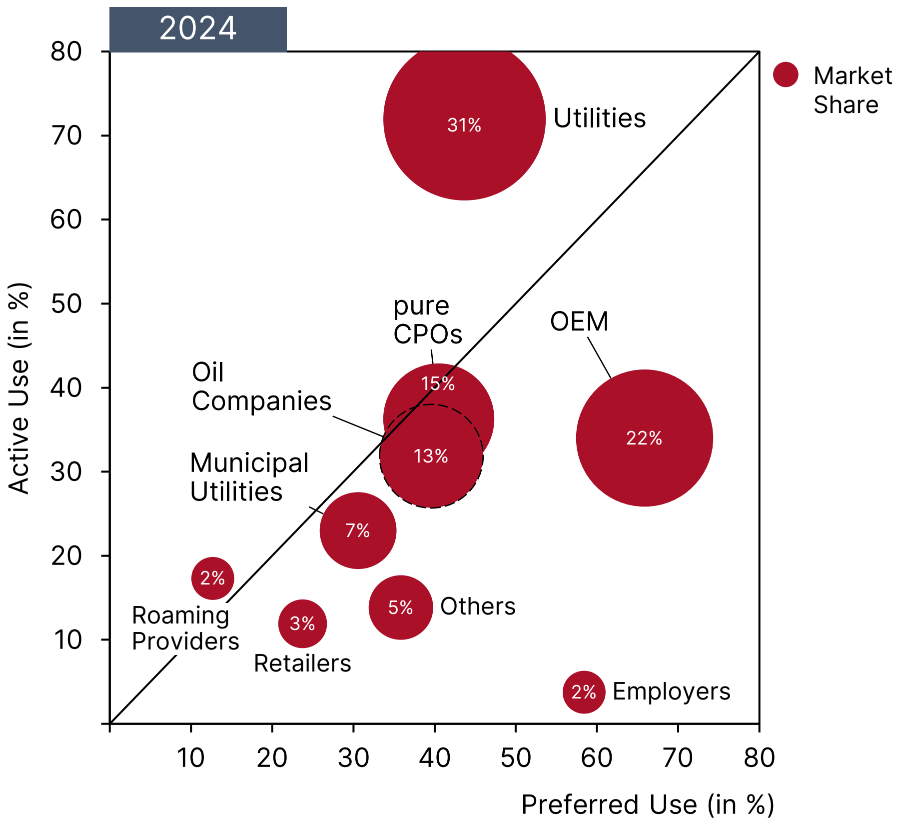
2

Oil companies and CPOs gain ground

National and municipal utilities still hold the largest market share (38%).

Thanks to its collaboration with ADAC, Aral pulse was able to significantly increase its market relevance.

Also pure CPOs like IONITY were able to significantly increase their market share.



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

Content

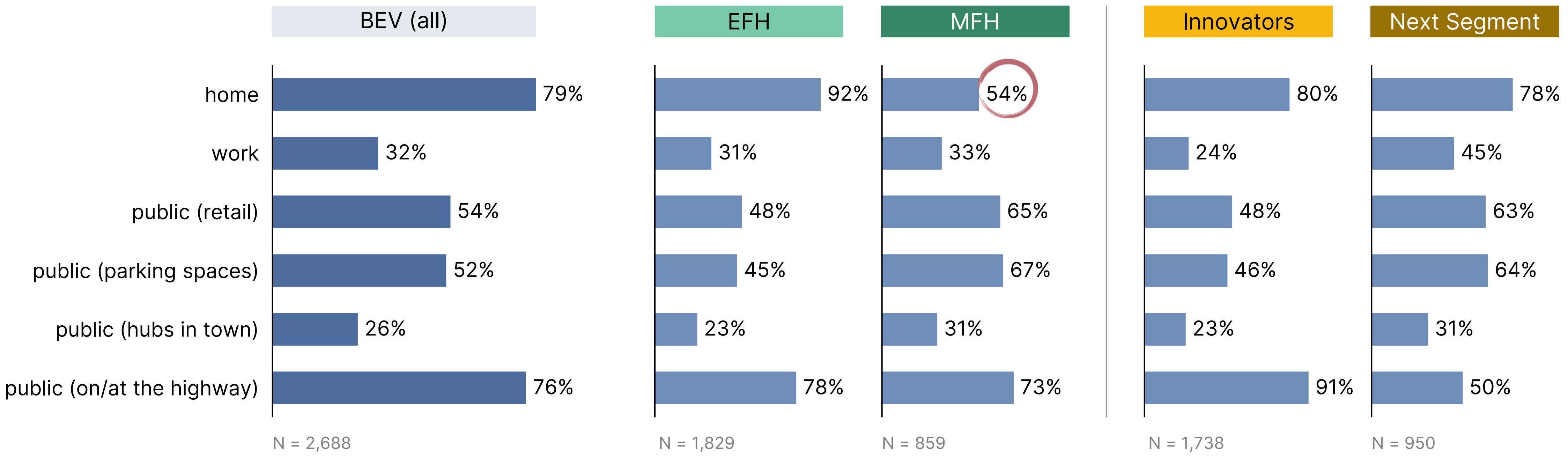
Driving & Charging Behavior

Charging Location

Most respondents charge at home or public en route.

„Where do you currently charge your electric car?"

(multiple answers possible)



Content

Preliminary remark

To be successful in the eMSP market, providers have to score points in two dimensions:

1 **KPI: Active Use**

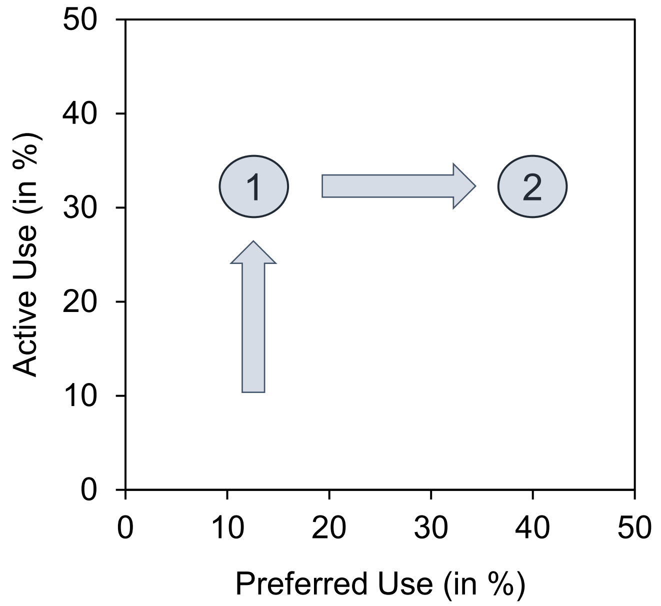
Beyond ad-hoc charging, EV drivers can only use services they are registered with.

Therefore, providers must ensure that they are included in the relevant eMSP set at all, i.e. that EV drivers have a contract with them and use them at least occasionally.

2 **KPI: Preferred Use**

eMSP services are usage-based business models. A contract alone is therefore not enough.

For success, it is important that EV drivers not only use a service occasionally, but preferentially.



Preliminary remark on eMSP clustering

To facilitate the analysis of eMSP service market share, all service provider are categorised into provider groups.

This analysis uses the following classification:

1. Utilities*: E.ON Drive, EWE Go, mobility+ (EnBW), Maingau Autostrom, InCharge, Lichtblick
2. Oil Companies: Aral pulse (incl. ADAC eCharge), Shell Recharge, TotalEnergies
3. Pure CPOs*: IONITY, Fastned, Tesla (for non-Tesla owners)
4. Roaming Providers: Plugsurfing, Chargemap, NextCharge, ChargePoint, Elli
5. OEM services: all EV brand’s services, Tesla (for Tesla owners)
6. Municipal Utilities: all municipal utilities, eCharge+, ladenetz.de, Ladeverbund plus, Tank-E network
7. Employers
8. Retails
9. Others: Moovility, PlugShare, NextCharge, Leasing Services (e.g. Sixt), other

* Although many utilities also offer charging energy in the role of a CPO, we have summarised them under “Utilities”. Providers that only offer charging energy as CPOs have been summarized under “Pure CPOs”.

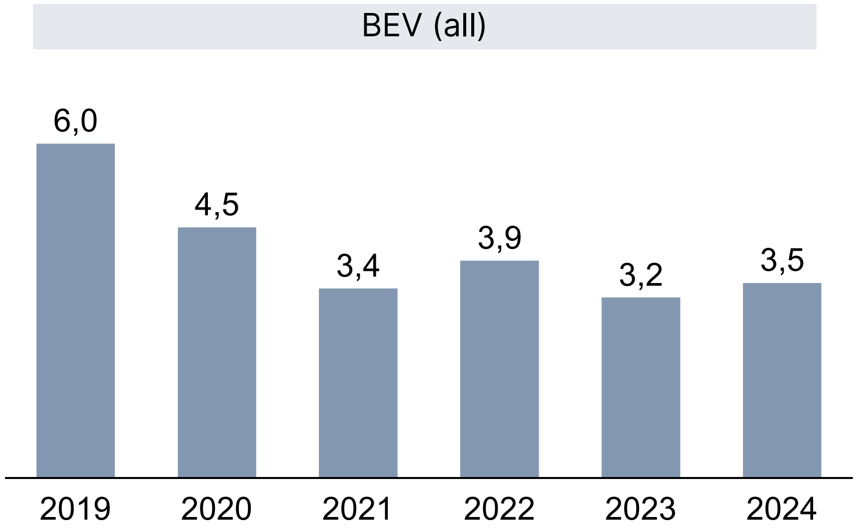
eMSP Preferences

Actively used eMSPs

The number of actively used eMSP services declined for several years. After a decrease last year, it went up again to 3.5.

„Which charging services do you actively use?“

(Multiple answer possible)



N = 2,688 (2024)

eMSP Preferences

Actively used eMSPs

„Which charging services do you actively use?“

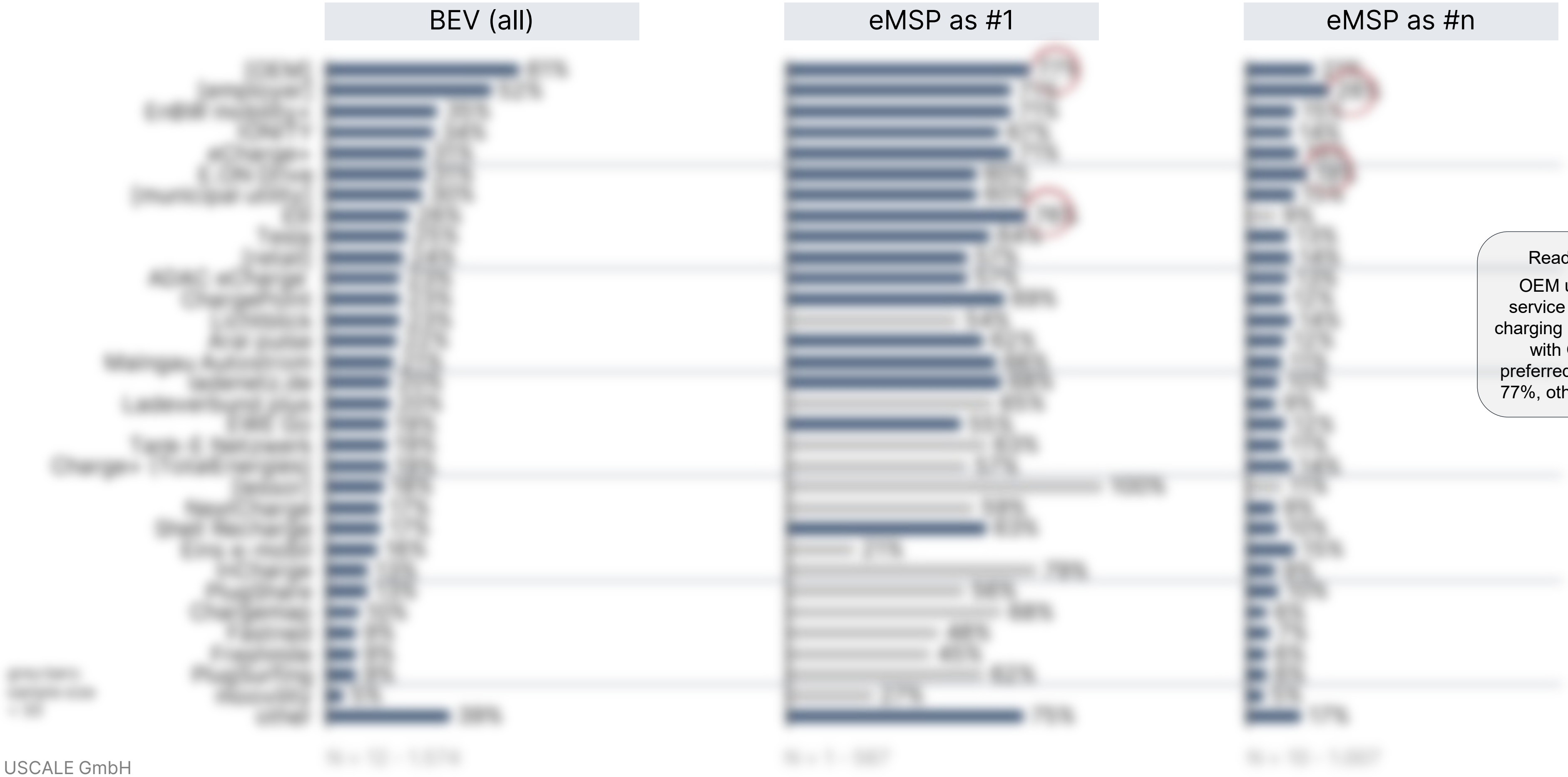
eMSP Preferences

Frequency of Use

High frequencies of use for OEM, EnBW mobility+ and IONITY.

„How often do you use which charging service?"

(in % of all public charging processes, i.e. total = 100%)?"



Reading example:
OEM users use their service for 61% of their charging processes. Users with OEM as their preferred service use it in 77%, other users in 21%.

eMSP Preferences

Preferred eMSP Use (2)

„Which of the charging services just mentioned do you prefer to use?“

(shown: Share of active users)

eMSP Preferences

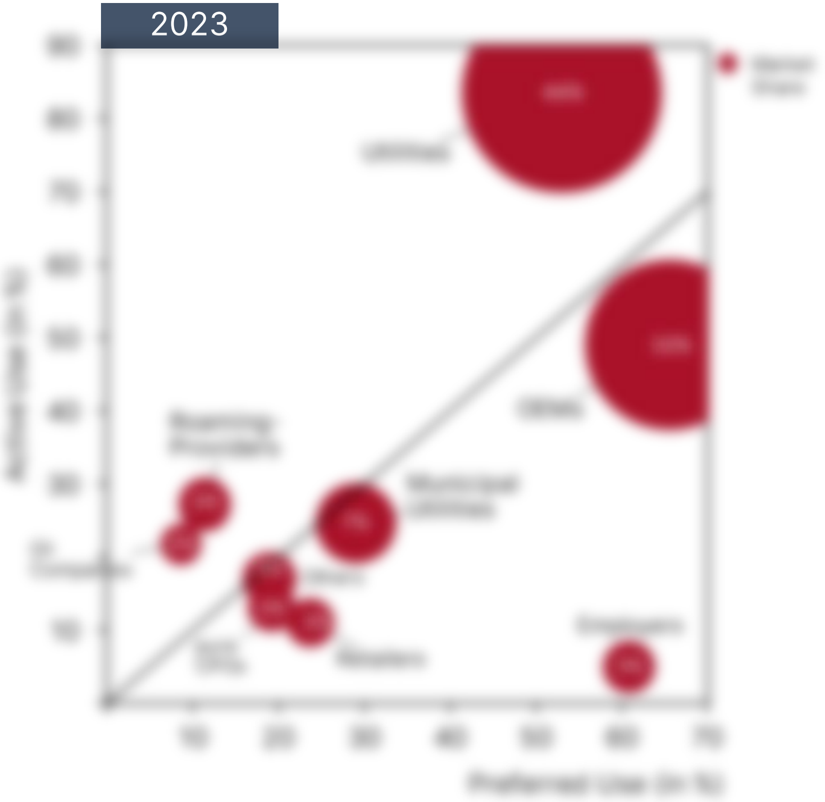
eMSP Provider Groups Market Shares

Utilities, OEMs and Roaming Providers lost market share, most of which went to Oil Companies and CPOs.

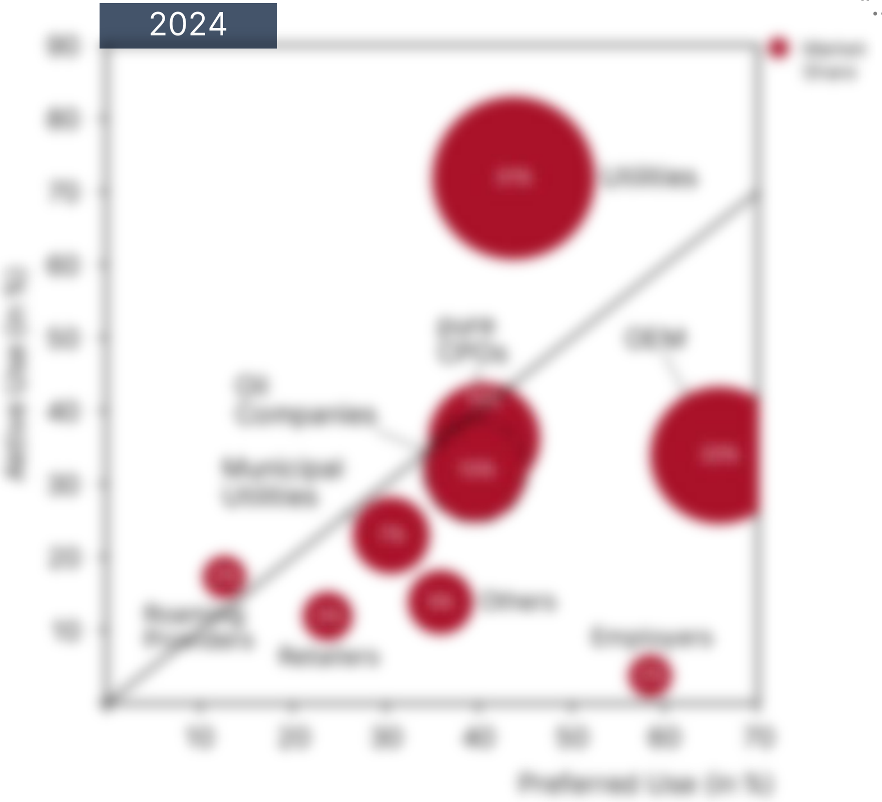
„Which charging services or apps do you actively use?"

vs.

"…most frequently?"



N = 2.758



N = 2.688

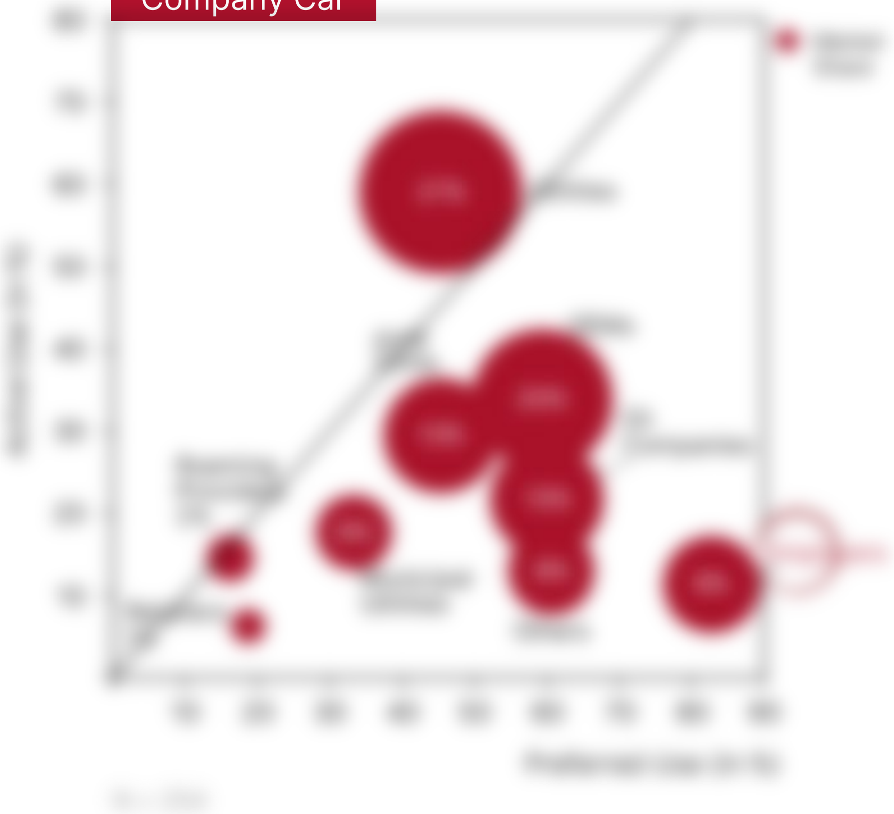
eMSP Market Shares by Vehicle Ownership

„Which charging services or apps do you actively use?"

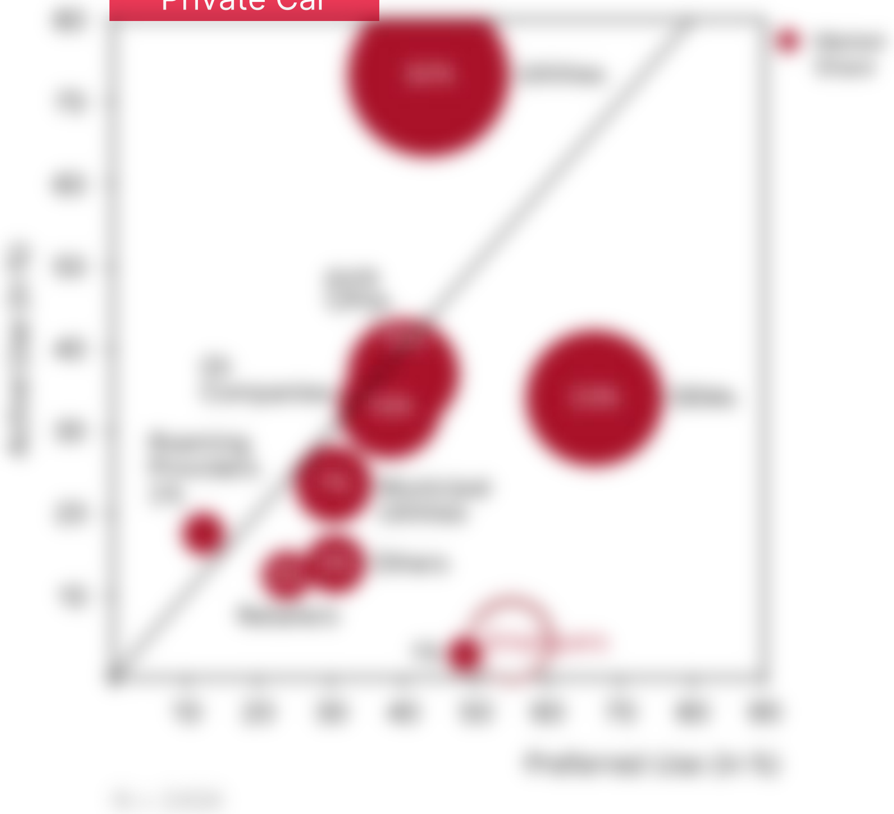
vs.

"…most frequently?"

Company Car



Private Car



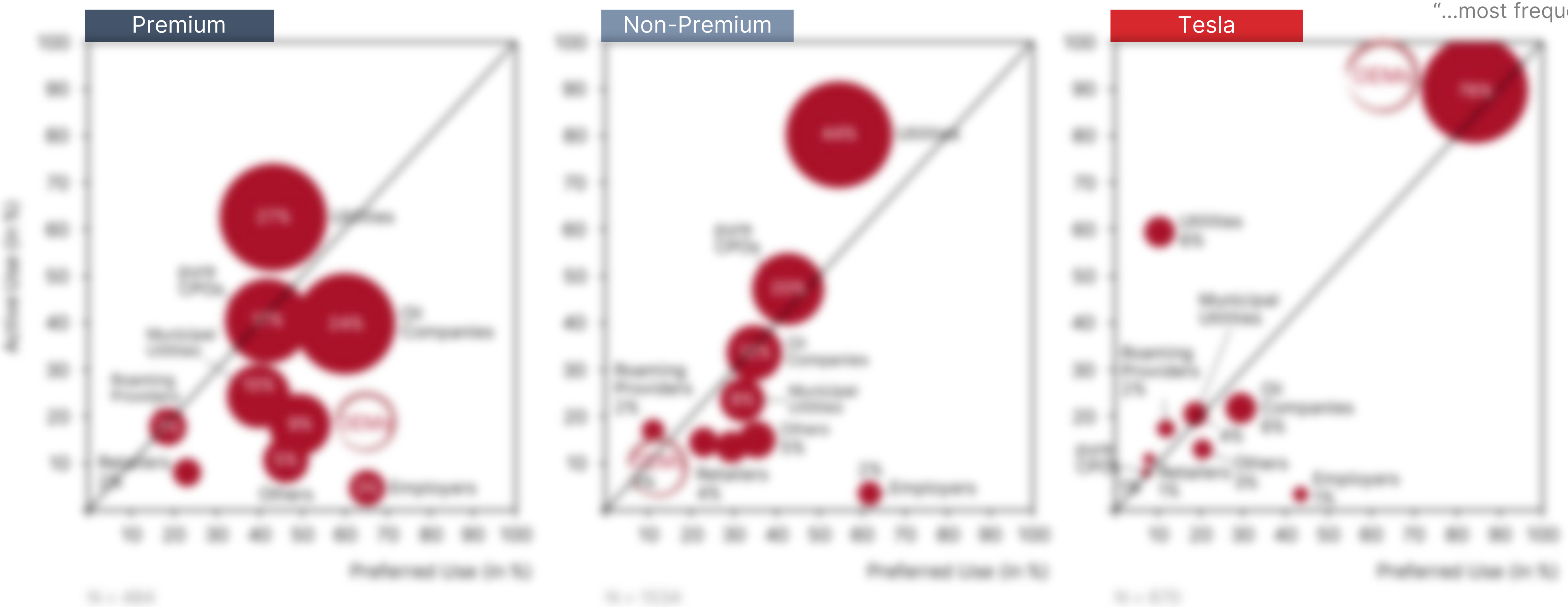
eMSP Preferences

eMSP Market Shares by Car Segment

„Which charging services or apps do you actively use?"

vs.

"...most frequently?"



eMSP Preferences

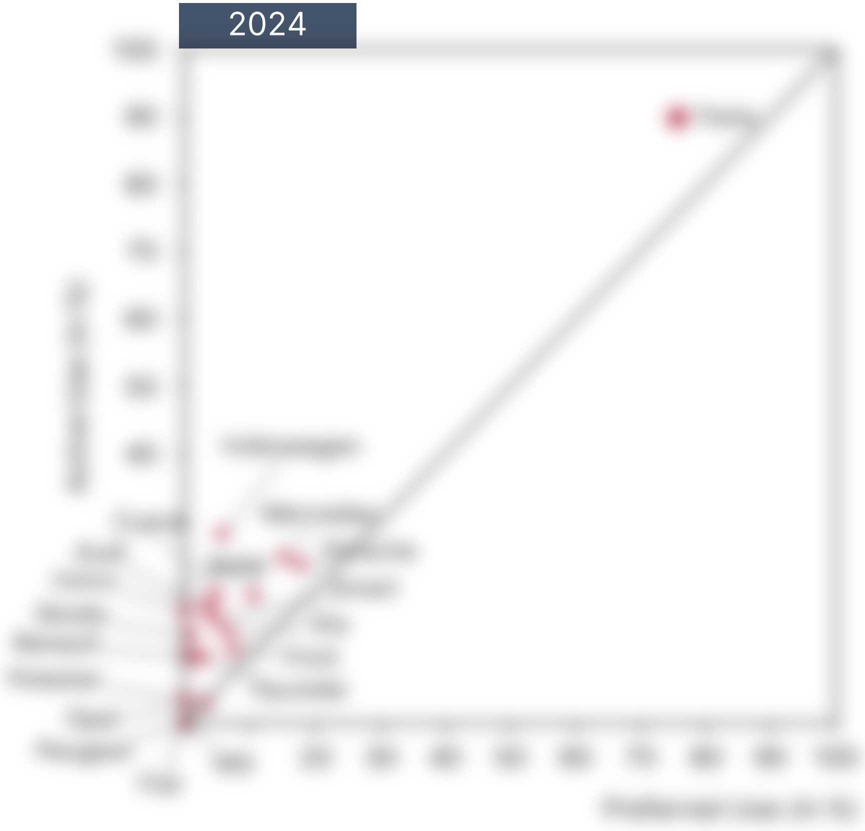
OEMs’ eMSP Offerings by Brand

„Which charging services or apps do you actively use?”

vs.

“…most frequently?”

N = 2.758



N = 2.688

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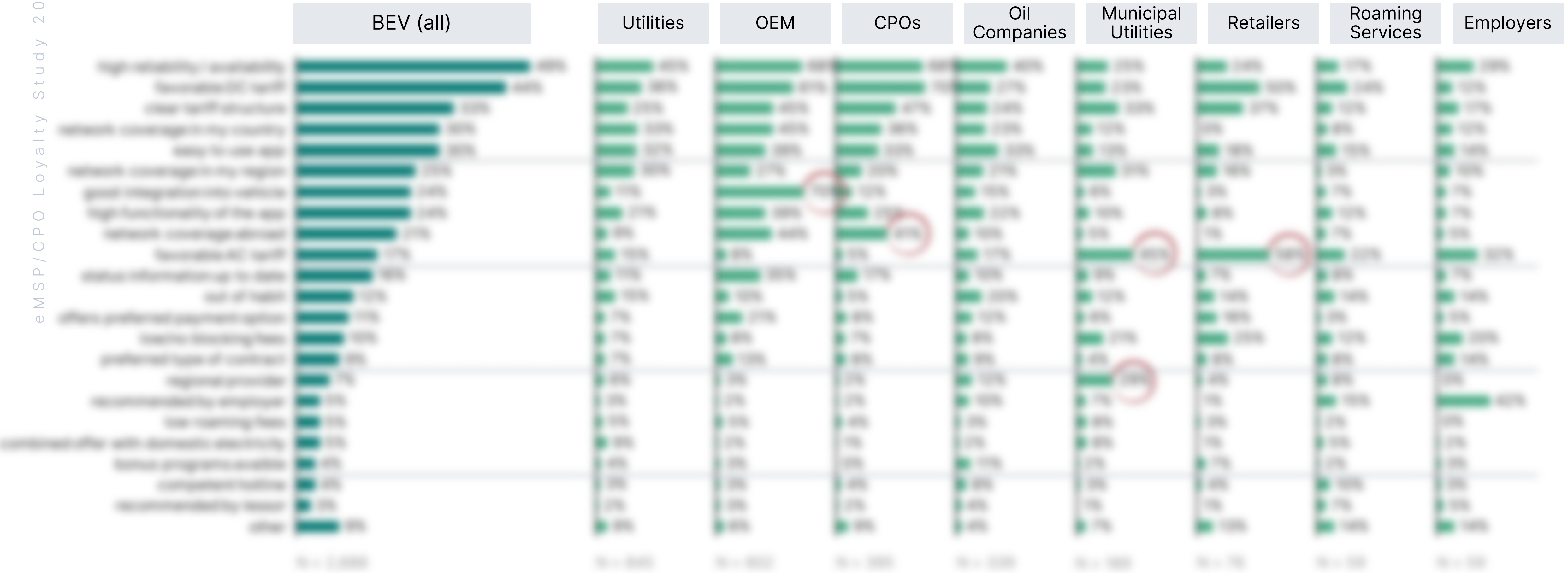
Content

eMSP Preferences

Reasons for Preference (1)

„What **are** the most important reasons why you prefer to use your number 1?"



Content

eMSP Preferences

eMSP Vendor Profile: Aral pulse

ARAL, with an active use of 27%, and a preferred use of 21%,was found by most respondents via google. They score with a high reliability.

Market Share:

Preferred use = yes:
Found how:

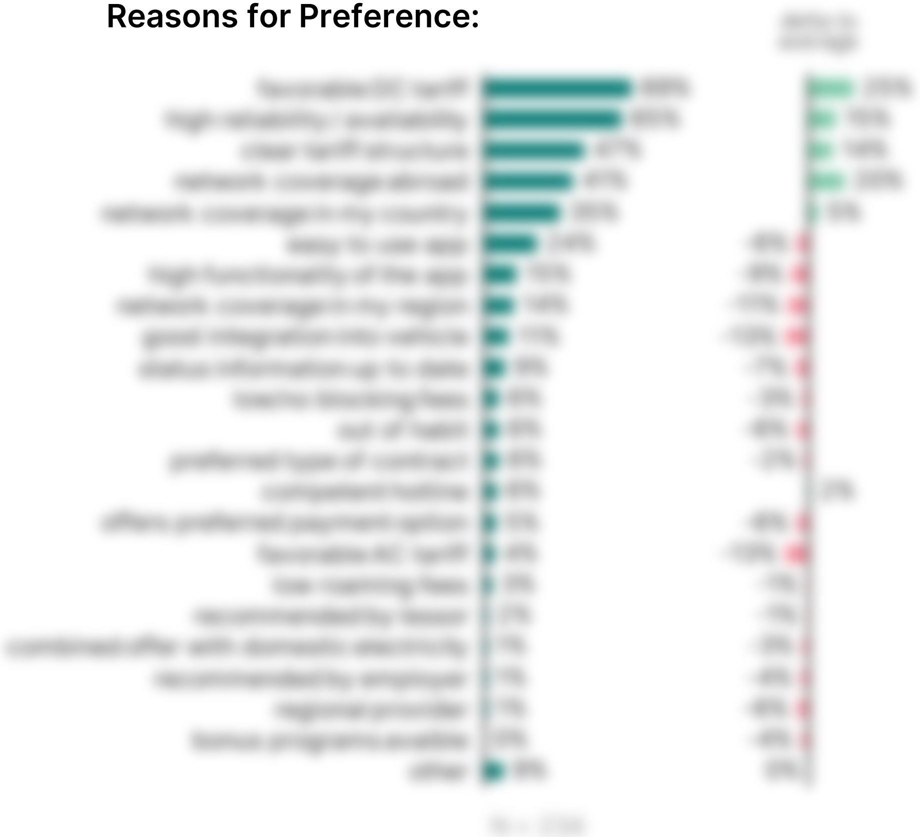
Preferred use = yes:
Reasons for Preference:

eMSP Vendor Profile: IONITY

Market Share:

Preferred use = yes:
Found how:

Preferred use = yes:
Reasons for Preference:

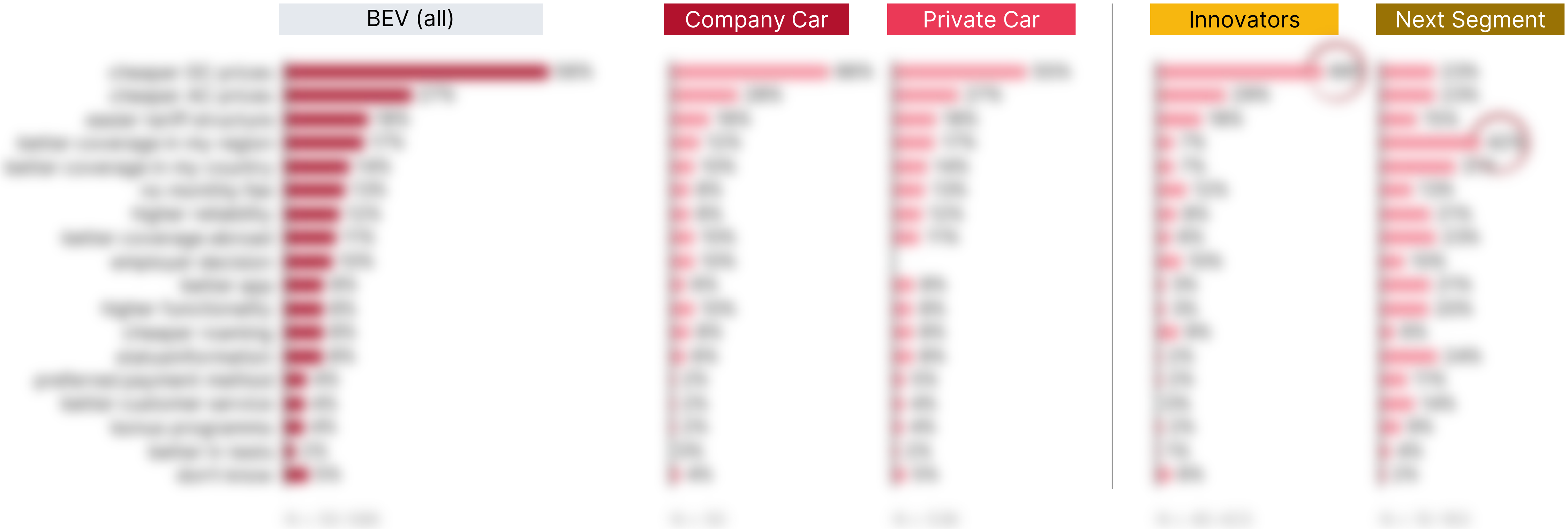


Content

eMSP Preferences

Reasons for Disloyalty

„Why did you change your previously preferred charging service?"



Content

CPO Preferences

CPO Attractiveness

Preference for CPOs = yes

„How attractive do you find the following charging parks?“

eMSP/CPO Loyalty Study 2024

Content

CPO Preferences

CPO Vendor Profile: Allego

Allego scores with high charging capacity and availability but is devalued by reliability and ad-hoc prices.

Attractiveness:

”How attractive do you find Allego charging parks?“

Reasons for Un-/Attractiveness:

”Why do you find the Allego attractive/unattractive?”

CPO Preferences

CPO Vendor Profile: Aral pulse

Aral pulse scores with high charging capacity and locations but is devalued by ad-hoc prices.

Attractiveness:

”How attractive do you find AralPulse charging parks?“

Reasons for Un-/Attractiveness:

”Why do you find the AralPulse attractive/unattractive?”

USCALE

SCALE YOUR USER
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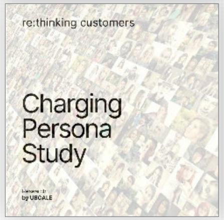
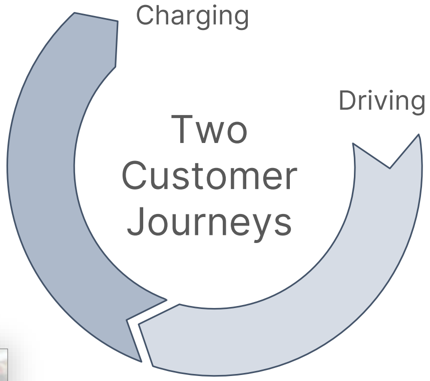
Focus studies on all touchpoints

USCALE delivers user research on all touchpoints of the e-mobile customer journey.

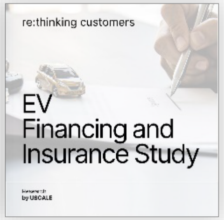
Business Models

Charging





Purchase



Usage