USCALE

Excerpt
(Total report: ca. 70 pages)

Charging Payment Study 2024

Authorization and Payment at the Charge Pole

USCALE GmbH
www.uscale.digital

Objective

Initial situation:

- There are over 1,000 eMSP and CPO offerings in Germany. This leads to fierce competition in a rapidly growing market.
- Providers can only prevail if they offer attractive services that suit their target group with the right features, such as authorization and payment options at the charging point.

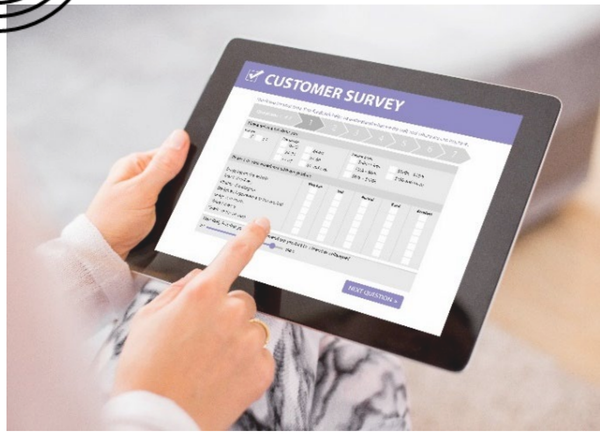
Questions:

- What authorization and payment methods do EV drivers use today?
- What usage drivers and barriers do EV drivers see in the currently most important payment methods?
- What does this mean for the acceptance and likely future use of the methods?
- 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
– Length of Interview:	10 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.

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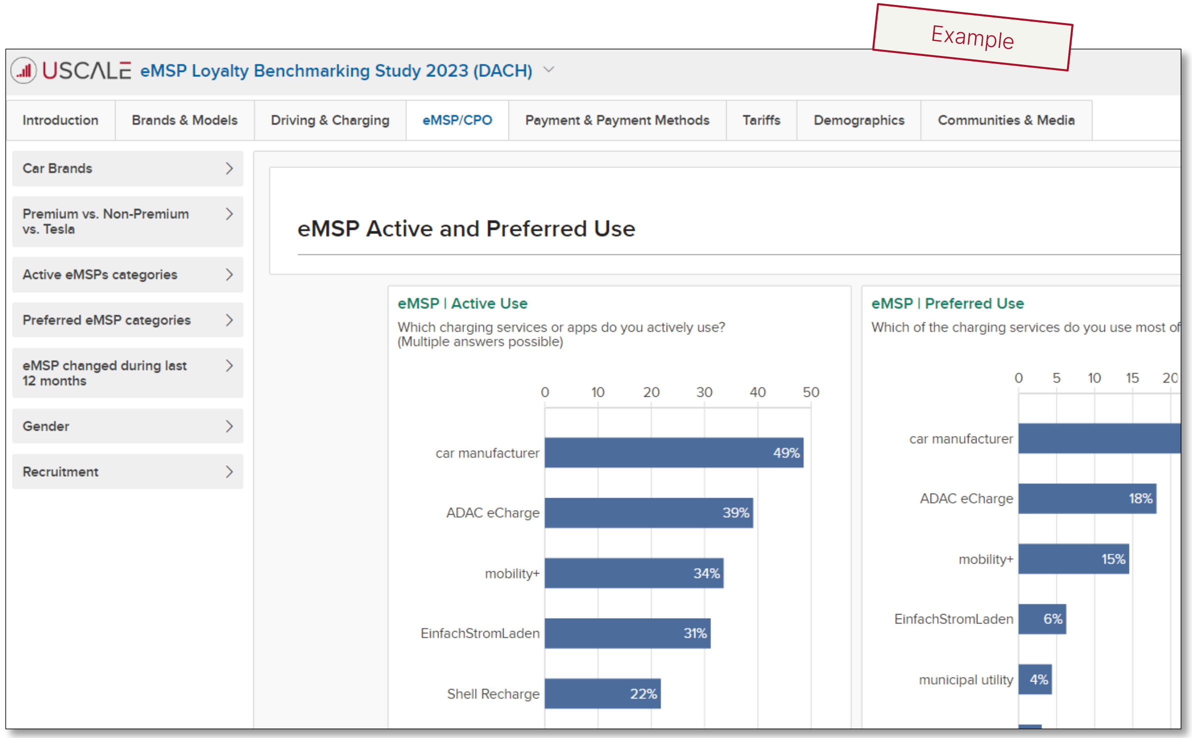
Dashboard for Individual Analyses

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.



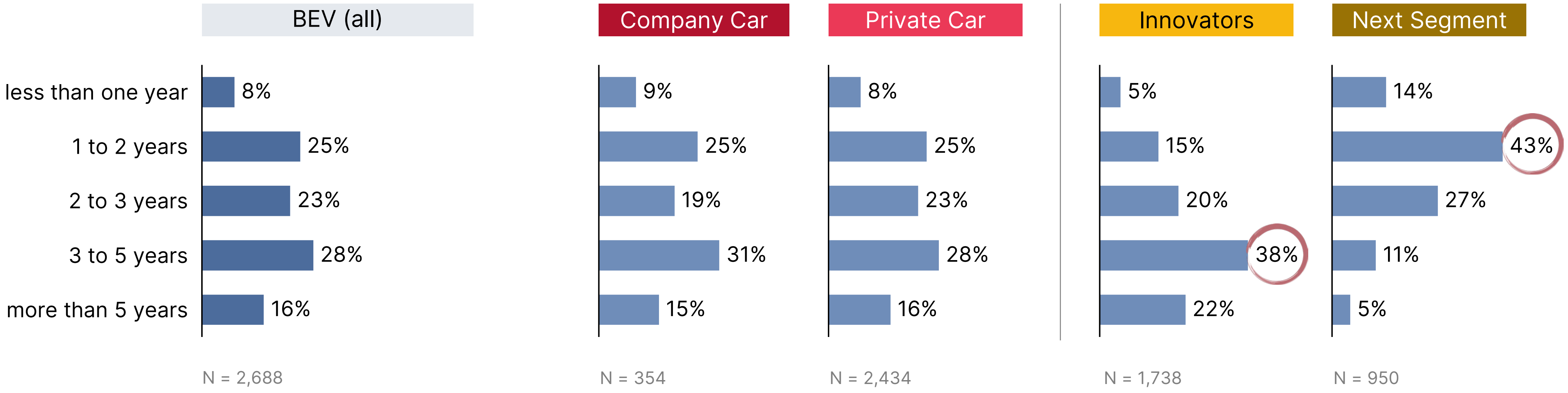
Content

Demography, Living and Driving Habits

EV Experience

The respondents have extensive experience in driving and thus in charging at public charging stations. Innovators drive electric for longer than the next segment.

„How long have you been driving electric?“



Content

Current Usage and Preference

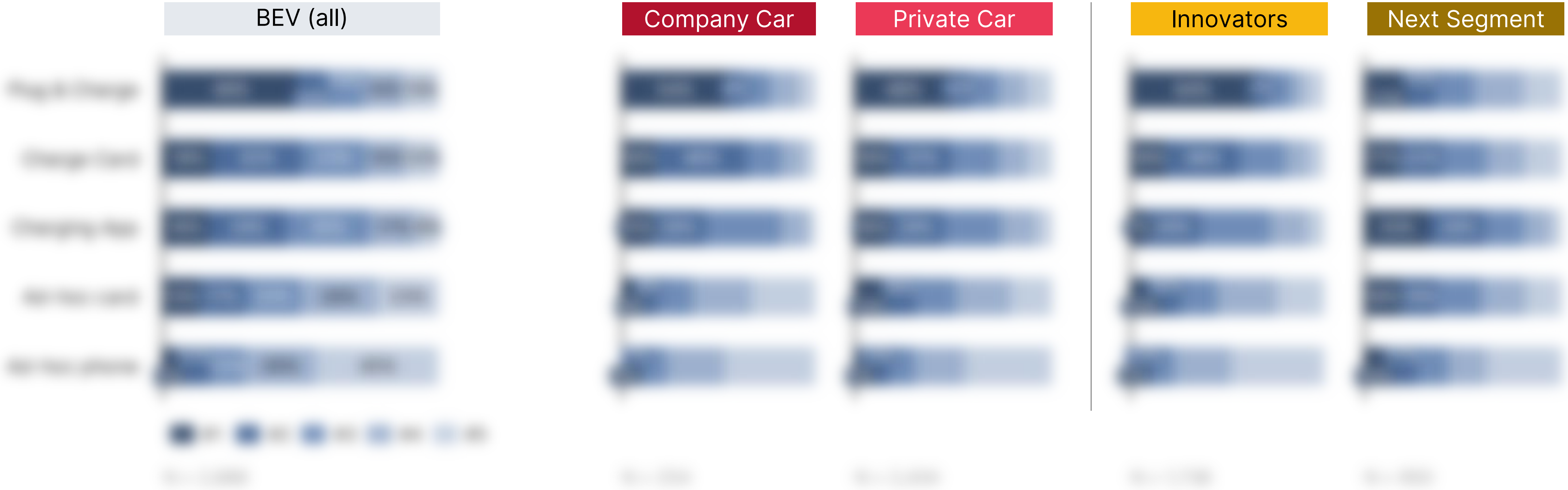
Used Payment Method

„How do you usually pay at publicly accessible charging stations?“

Current Usage and Preference

Preferred Payment Method

„How would you prefer to pay?"



Current Usage and Preference

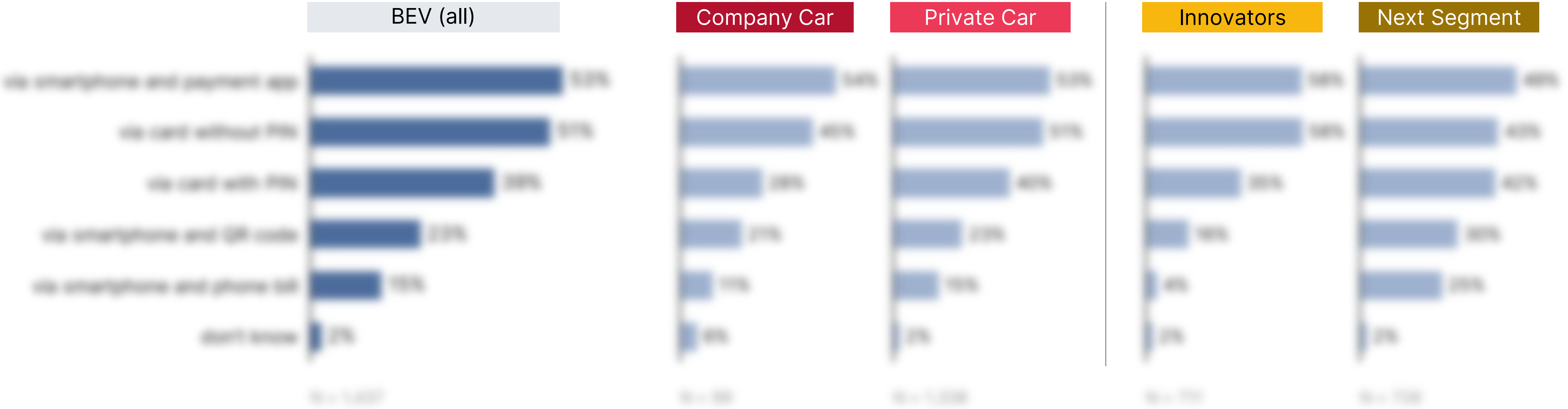
Ad-hoc Preference

Those who regularly use ad hoc payments prefer to pay with their smartphone payment app or to use their credit card.

Ad-hoc payment used smartphone = always, frequently or sometimes

Ad-hoc payment used credit card = always, frequently or sometimes

„How would you like to use ad-hoc charging?"



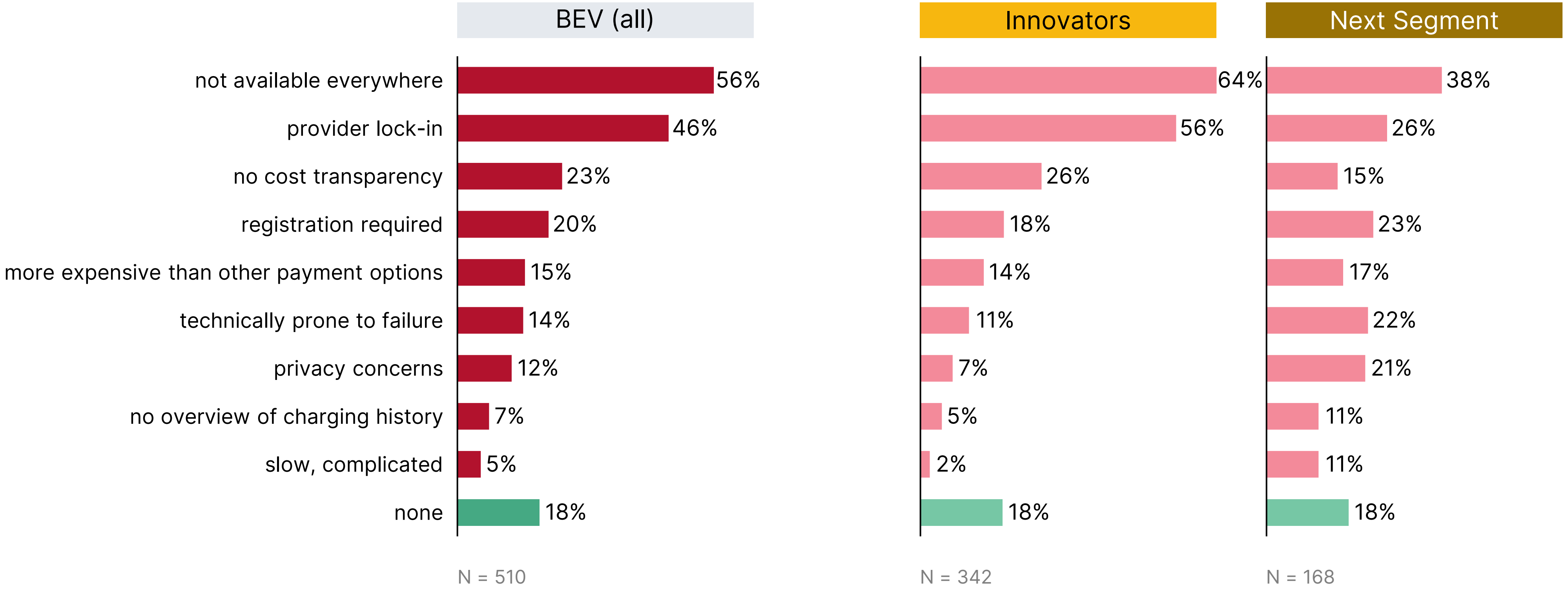
Content

Assessment of Usage Drivers and Barriers

Plug&Charge: Usage Barriers

The respondents mention many barriers to use. The biggest barriers are limited availability and provider lock-ins.

„Which of the following disadvantages do you see in paying with Plug&Charge?"



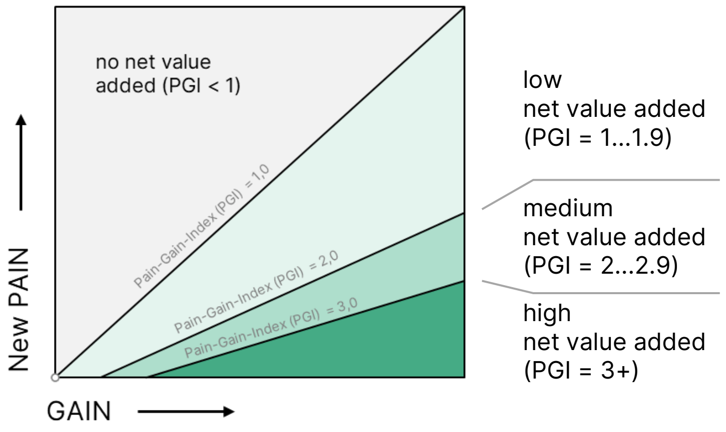
Assessment of Usage Drivers and Barriers

Plug&Charge: Net Value Added

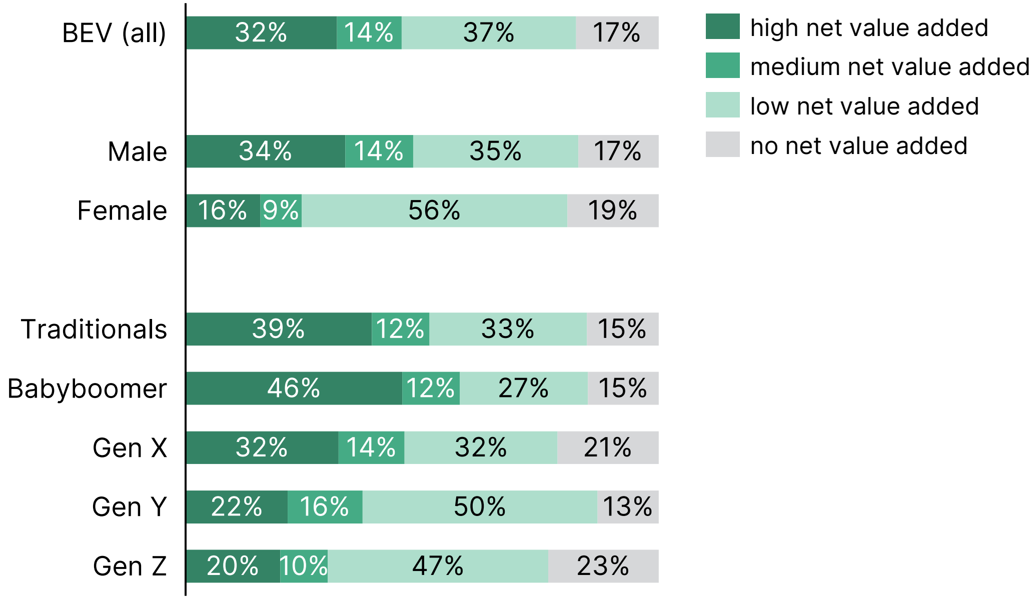
Traditionalists and boomers see the greatest value in Plug&Charge. 39% and 46% respectively are very open to corresponding offers.

"To summarise, how highly do you personally rate the advantages / disadvantages of paying with Plug&Charge?"

schematic representation



PGI = Pain-Gain-Index



N = 30-447

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Focus studies on all touchpoints

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

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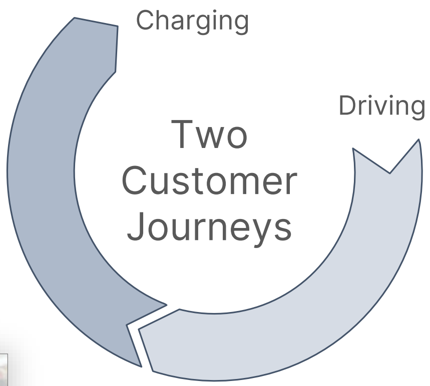
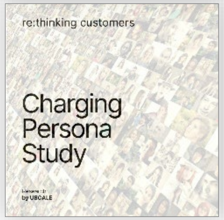
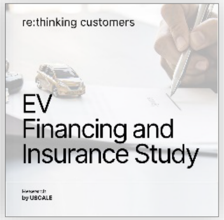


Business Models

Charging



Purchase



Usage