

EXCERPT

(from a total of ca. 140 pages)

CPO / eMSP Charging Services Study 2026

Brand Health Funnel of the Leading Service Providers

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



Management summary

- Public charging is getting more widespread as the adoption grows. The share of apartment building residents in the target group is rising, as is the share of energy-charging facilities. The share who charge in public charge around 10% of their energy facility, i.e. not at home or at work.
- Residents often use charging services in a decreasing way, while vehicle hardware is becoming a more decisive factor. The share of the different groups, however, increases strongly with the adoption rising, making that first milestone crucial. Respondents clearly report other than before and 10% share.
- Most charging service providers
 - Public charging is more widespread and more widespread, rising to 10% and less public. Concentration is gradually rising, but in average, the share of public charging is still low. The share of public charging is still low. The share of public charging is still low.
 - Efficiency is increasing, making it possible to use more than 10% of the share.
 - High share of public charging services, especially in regions. Most is getting more widespread and providers in the adoption group, while not only 10% are not attracted to the share.
 - The public provider will replace highly low share of charging services, the not yet used other vehicle used services.
 - The share of public providers, especially, will share of 10% and less public.
 - The share of public providers, especially, will share of 10% and less public.
- Respondents
 - Residents group will be increasingly affected in the near future about the public charging services, especially, and will be not affected in public charge, but not 10%.
 - High share of public charging services, especially, will share of 10% and less public.
 - High share of public charging services, especially, will share of 10% and less public.

Management summary

1

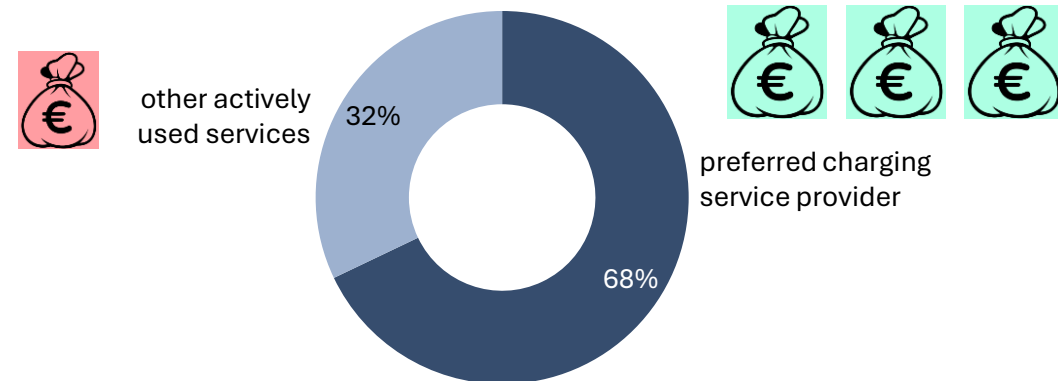
Becoming the preferred provider is a must

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

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

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

Preferred charging service providers usage



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

Management summary

4

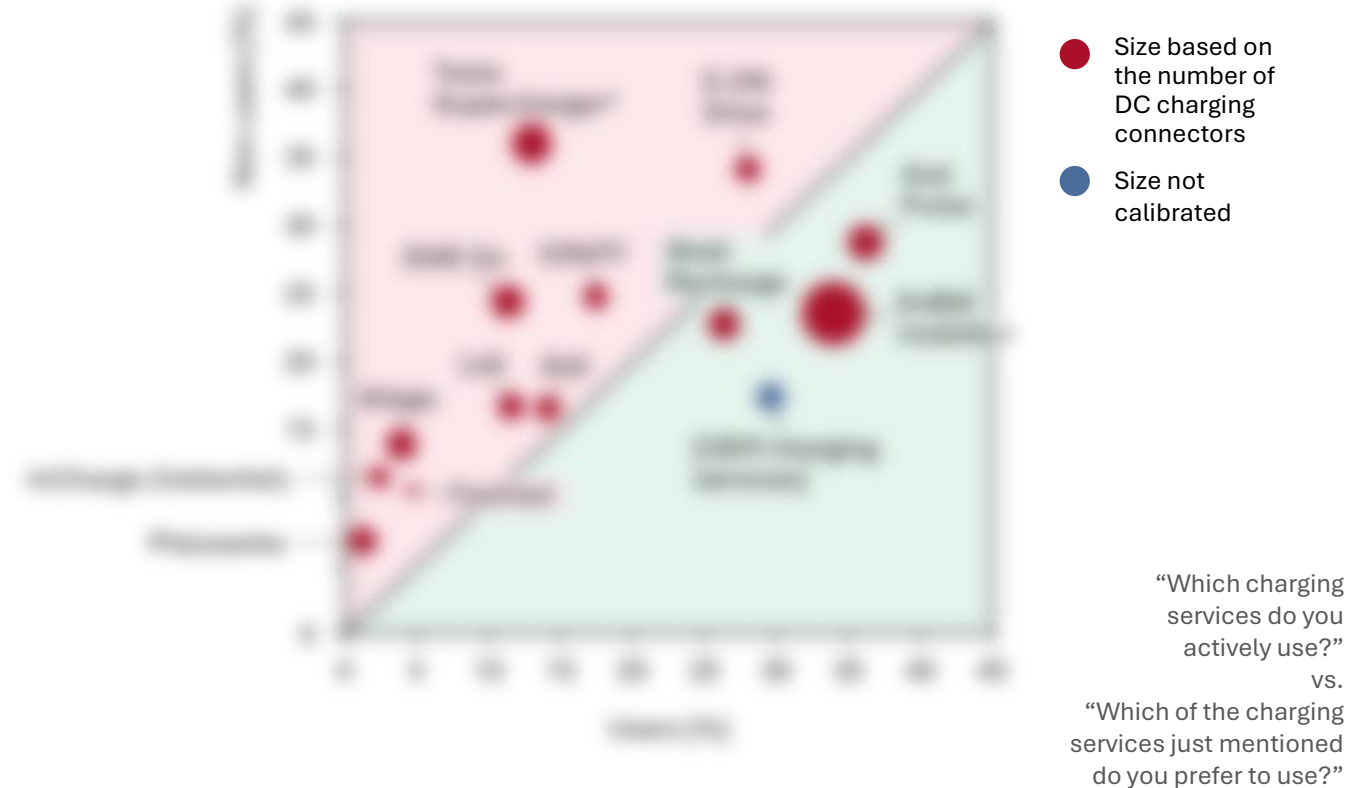
Non-user to user ratios vary dramatically by provider

Across all 16 providers with brand awareness, non-users still outnumber users overall (1.2 : 1), but this aggregate masks dramatic differences by provider.

... convert best, with users outnumbering or nearly matching non-users, while niche providers like ... see 5 to 6 non-users for every user.

The overall ratio is driven mainly by the larger, better-known brands, not by a simple average across providers.

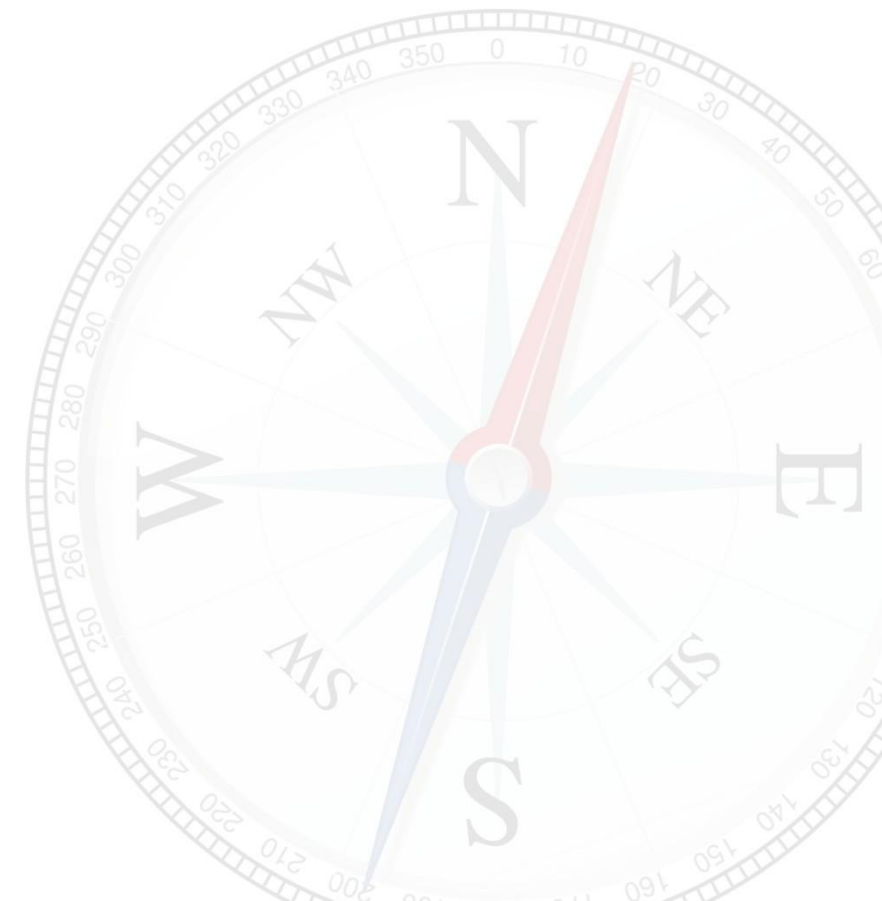
Conversion of non-users to active users:



* Non-Tesla drivers

Contents

- 
1. Management summary [↗](#)
 2. Methodology [↗](#)
 3. Charging behavior [↗](#)
 4. Customer journey to the charging service provider [↗](#)
 - Touchpoints and information behavior
 - Provider awareness
 - Selection decision (Conjoint analysis)
 5. Charging service providers of choice (users) [↗](#)
 - Actively used providers
 - Preferred providers
 - Reasons for preference and loyalty
 6. Charging service providers of rejection (non-users) [↗](#)
 - Disposition and consideration (unengaged, open, considerer)
 - Sentiment, perception and positioning
 - Reasons for rejection and churn
 7. Charging service provider profiles (fact sheets) [↗](#)
 8. Demographics, living situation, EV and driving habits [↗](#)



Target group

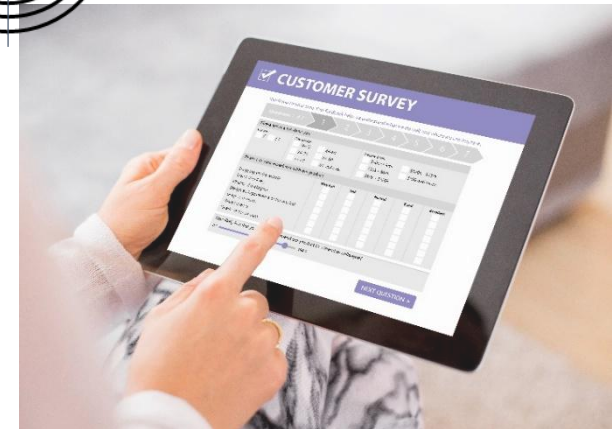
Survey:

- Target group: Owners of fully battery-powered electric vehicles (no plug-in hybrids) who charge publicly
- Survey: Online survey (CAWI)
- Market: Germany
- Recruitment: Social media, access panel
- Length of interview: 15-20 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. They were therefore included in the study as a comparison group.



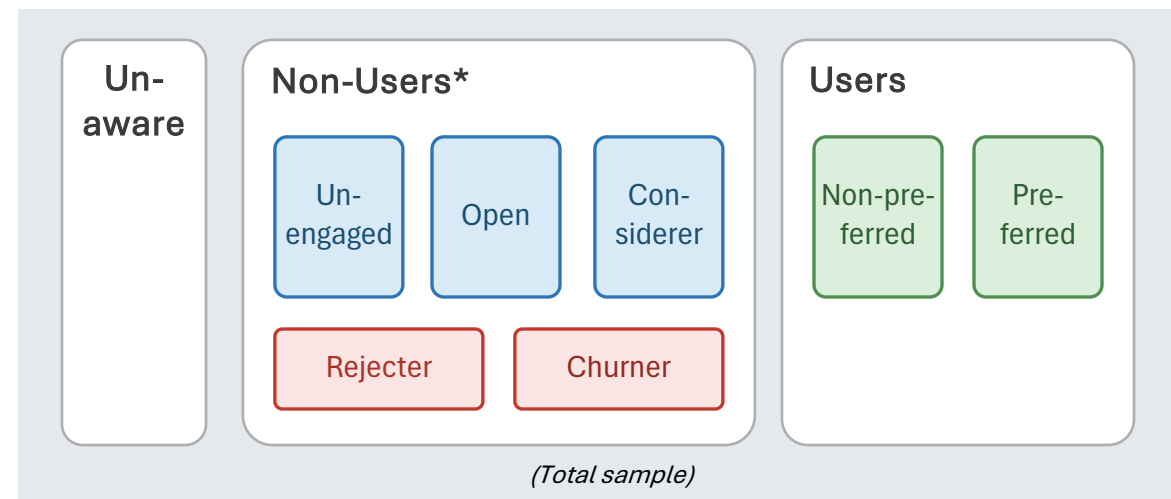
Understanding the CPO / eMSP Brand Health Funnel

Every EV driver lands in exactly one position on the Brand Health Funnel, from Unaware to Preferred, showing where the real growth and churn risk sit for each provider

A 360° view of the largest service providers:

- This study takes a 360° view of how EV drivers relate to every major charging service provider in the market.
- Each respondent is **classified along one path** per provider:
 - Do they know the brand, have they engaged with it further, what do they think of it, and would they consider using it or not, and if not, why?
 - Active users are then examined in depth on how they actually use the service.
- The result is a **Brand Health Funnel per provider**, showing both the size of every group and the reasons respondents sit where they do.

Brand Health Funnel:



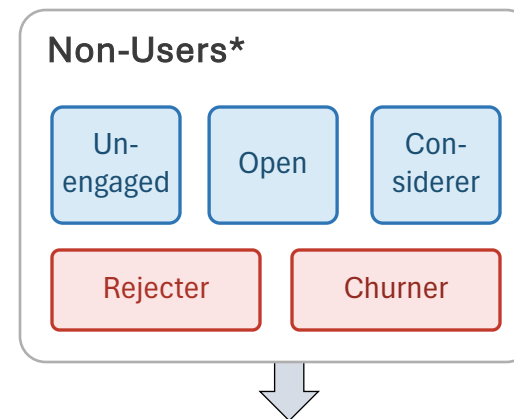
* Due to survey length limitations, non-users were only asked in depth about up to three known-but-unused providers each. Missing values were extrapolated proportionally.

Analyzing the CPO / eMSP Brand Health Funnel

To understand EV drivers' reasons for and against a charging service provider, non-users and users are asked in-depth follow-up questions.

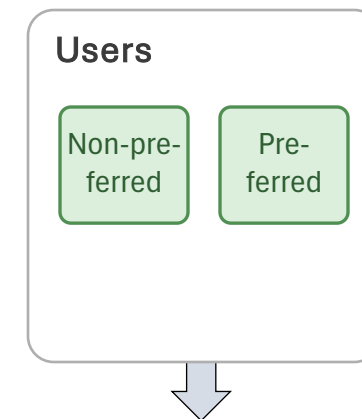
Deep dive into non-users and users:

- For providers EV drivers are individually **aware of but don't use**, non-users answer what they think of them and why they don't use them. This shows providers where they can focus to convert leads.
- For **actively used providers**, users are asked in which usage situations they use the actively used providers, and via which method they authorize (i.e. what role they see the provider in), along with NPS and reasons for a possible non-recommendation.
- For **preferred providers**, EV drivers are asked why that provider is their preferred choice and how they arrived at that decision.



Deep dive into:

- > Familiarity
- > Sentiment
- > Perceived service positioning
- > Perceived performance
- > Reasons for non-usage



Deep dive into:

- > Usage Situations
- > Authorization Methods
- > NPS + reasons for detraction
- > Reasons for preference
- > Customer journey to preference

Three EV adopter segments

To identify trends, this study differentiates between three adopter segments.

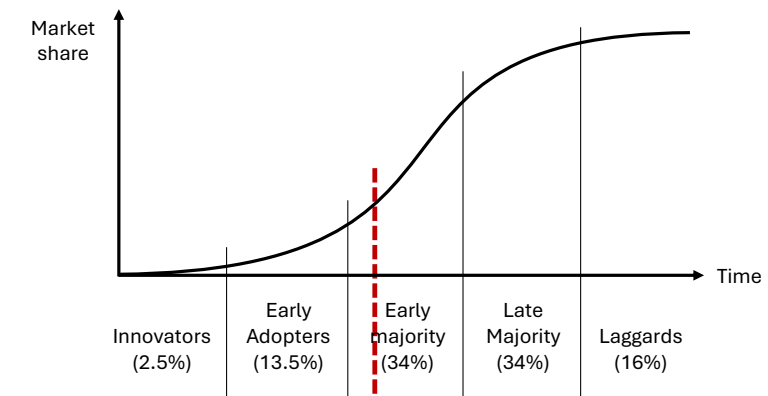
Background to segmentation:

- The best-known adoption model segments adopters by switchover timing, assuming it correlates with motivation (see figure). Critique: many EV enthusiasts switch later due to long car ownership cycles.
- This study therefore distinguishes between when respondents registered their first EV. This results in three segments:

EV Pioneers	EV Regulars	EV Newbies
> 3 years experience	2 to 3 years of experience	< 2 years experience

- The study results reveal two distinct effects:
 - Pioneers and Regulars show differences driven by genuine preference variation between segments (structural differences).
 - Newbies show differences because they are still in a learning phase, with their behavior yet to settle into a stable pattern.

Segments in the ramp-up of electric mobility*:



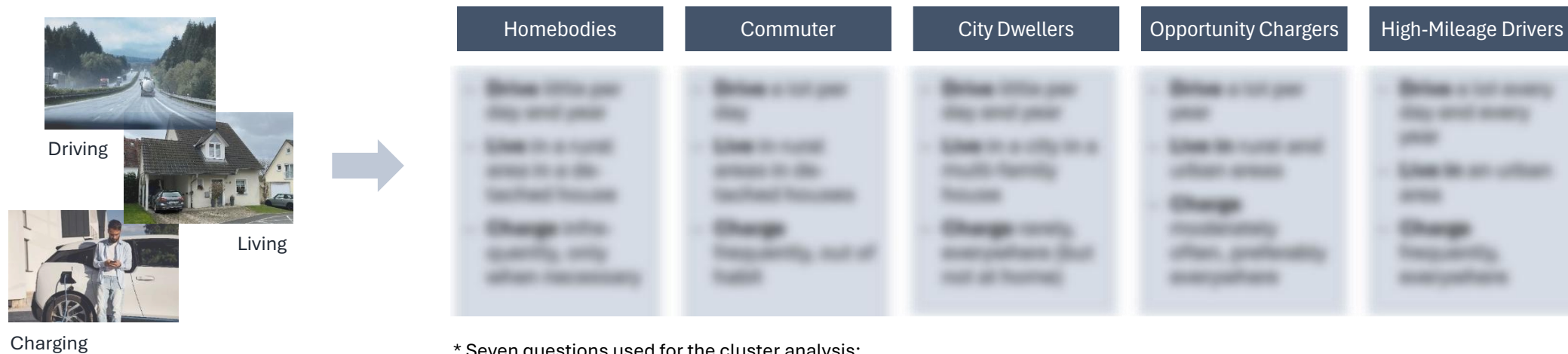
Market share of BEVs
in Germany in 06/26 (25%)

* The classification shown is based on Everett Rogers' diffusion model ([LINK](#)).

Five charging profiles

Based on driving routine, living situation, and charging behavior, five charging profiles have been developed for segmentation.

Charging profiles allow the study results to be broken down by charging behavior*. They show how EV drivers navigate the charging ecosystem. This reveals pain points and needs for products and services. The charging profiles are available in the study analysis tool.



* Seven questions used for the cluster analysis:

- Driving: km/weekday, km/year
- Living: type of house, size of town
- Charging: charging locations, charging occasions, charging frequency

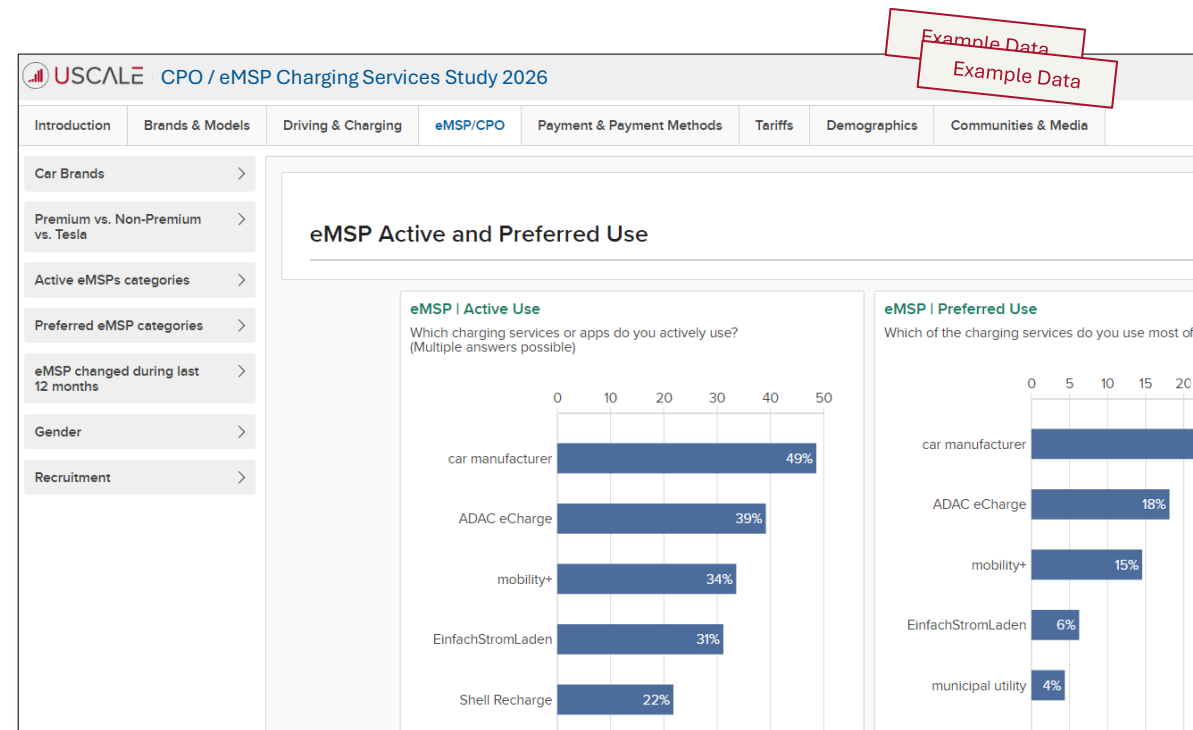
Dashboard for individual analyzes

Deep dives into individual subgroups

Only selected splits are shown in this document.

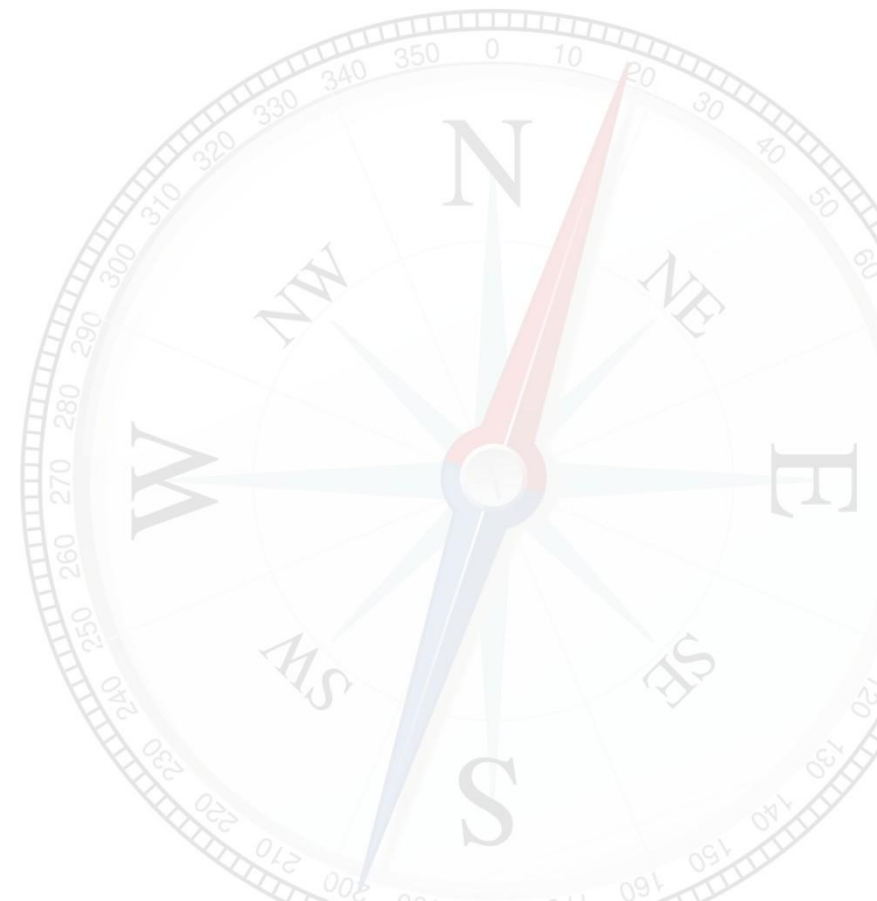
The associated dashboard allows splits according to any other variables.

To register, please contact your USCALE representative.



Contents

1. Management summary ➡
2. Methodology ➡
3. Charging behavior ➡
- ▶ 4. Customer journey to the charging service provider ➡
 - Touchpoints and information behavior
 - Provider awareness
 - Selection decision (Conjoint analysis)
5. Charging service providers of choice (users) ➡
 - Actively used providers
 - Preferred providers
 - Reasons for preference and loyalty
6. Charging service providers of rejection (non-users) ➡
 - Disposition and consideration (unengaged, open, considerer)
 - Sentiment, perception and positioning
 - Reasons for rejection and churn
7. Charging service provider profiles (fact sheets) ➡
8. Demographics, living situation, EV and driving habits ➡

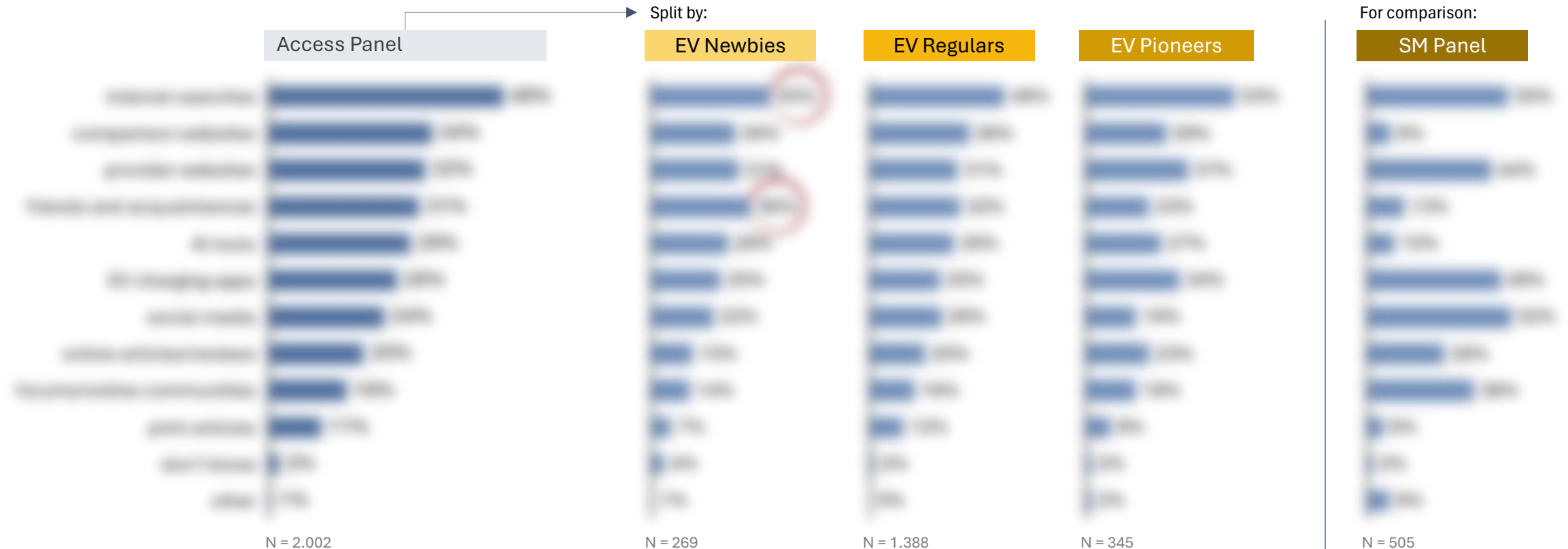


Touchpoints

Tariff research sources

General research channels are becoming less important, while recommendations from friends and family are becoming more important.

“Where do you find out about charging services and their offerings?”

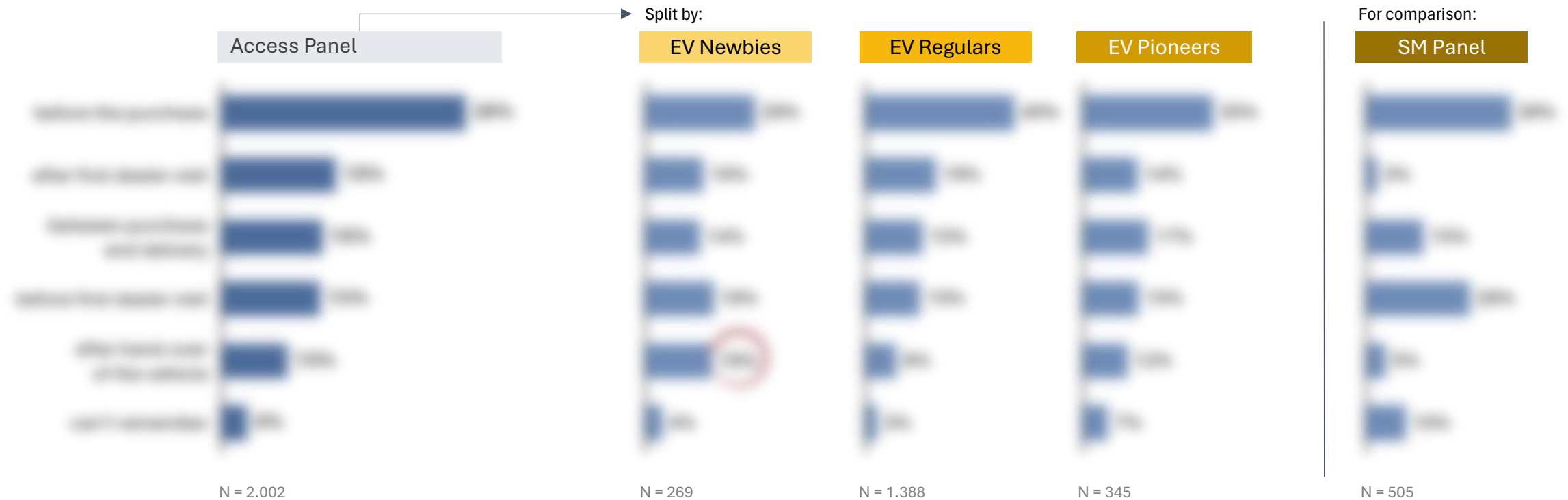


Touchpoints

First touchpoint

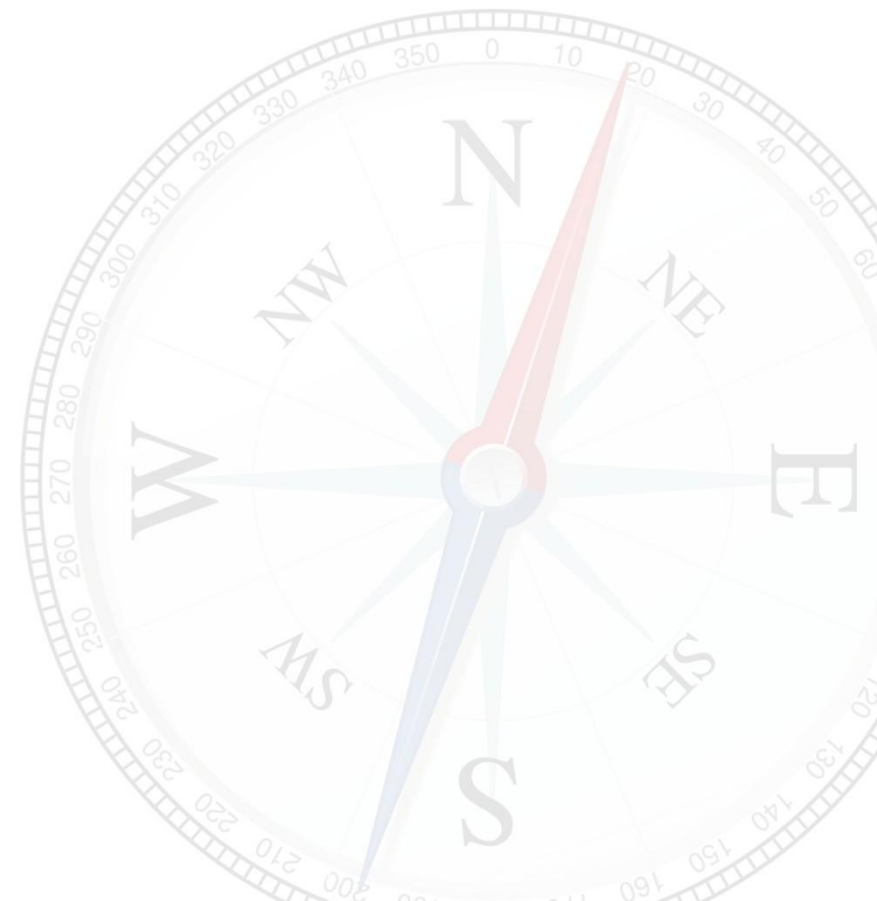
On average, the vast majority do their research before buying a car. However, with increasing age, the proportion of those who only do their research after taking delivery is increasing.

“When did you first find out about possible charging services?”



Contents

1. Management summary [↗](#)
2. Methodology [↗](#)
3. Charging behavior [↗](#)
- ▶ 4. Customer journey to the charging service provider [↗](#)
 - Touchpoints and information behavior
 - **Provider awareness**
 - Selection decision (Conjoint analysis)
5. Charging service providers of choice (users) [↗](#)
 - Actively used providers
 - Preferred providers
 - Reasons for preference and loyalty
6. Charging service providers of rejection (non-users) [↗](#)
 - Disposition and consideration (unengaged, open, considerer)
 - Sentiment, perception and positioning
 - Reasons for rejection and churn
7. Charging service provider profiles (fact sheets) [↗](#)
8. Demographics, living situation, EV and driving habits [↗](#)



Awareness

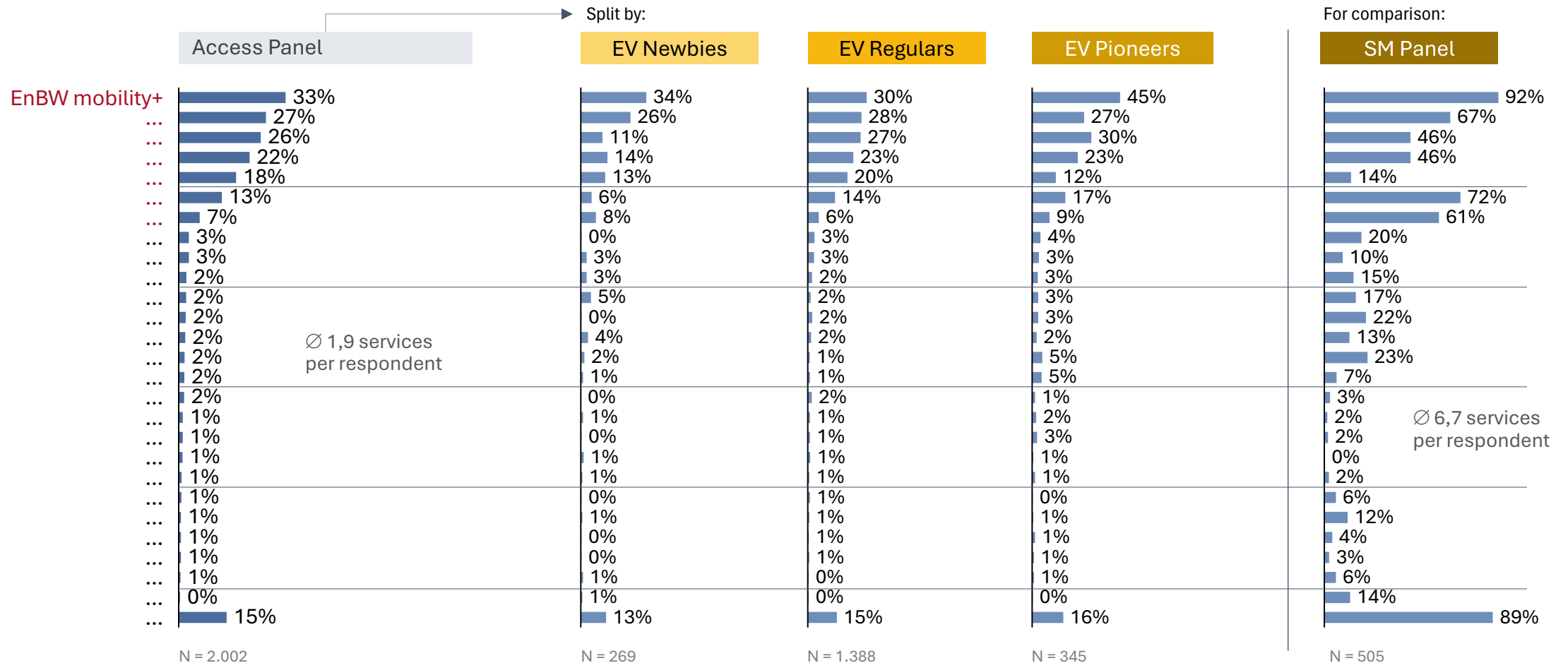
Charging service provider awareness (unprompted)

When asked off the cuff, EnBW's charging service is the best known, followed by ... and Beyond the top seven, very few other providers are recognised.

"Which charging service providers are you familiar with?"

By charging services, we mean charging point operators and providers of charging cards and charging apps.

(Please name all those that spring to mind.)"

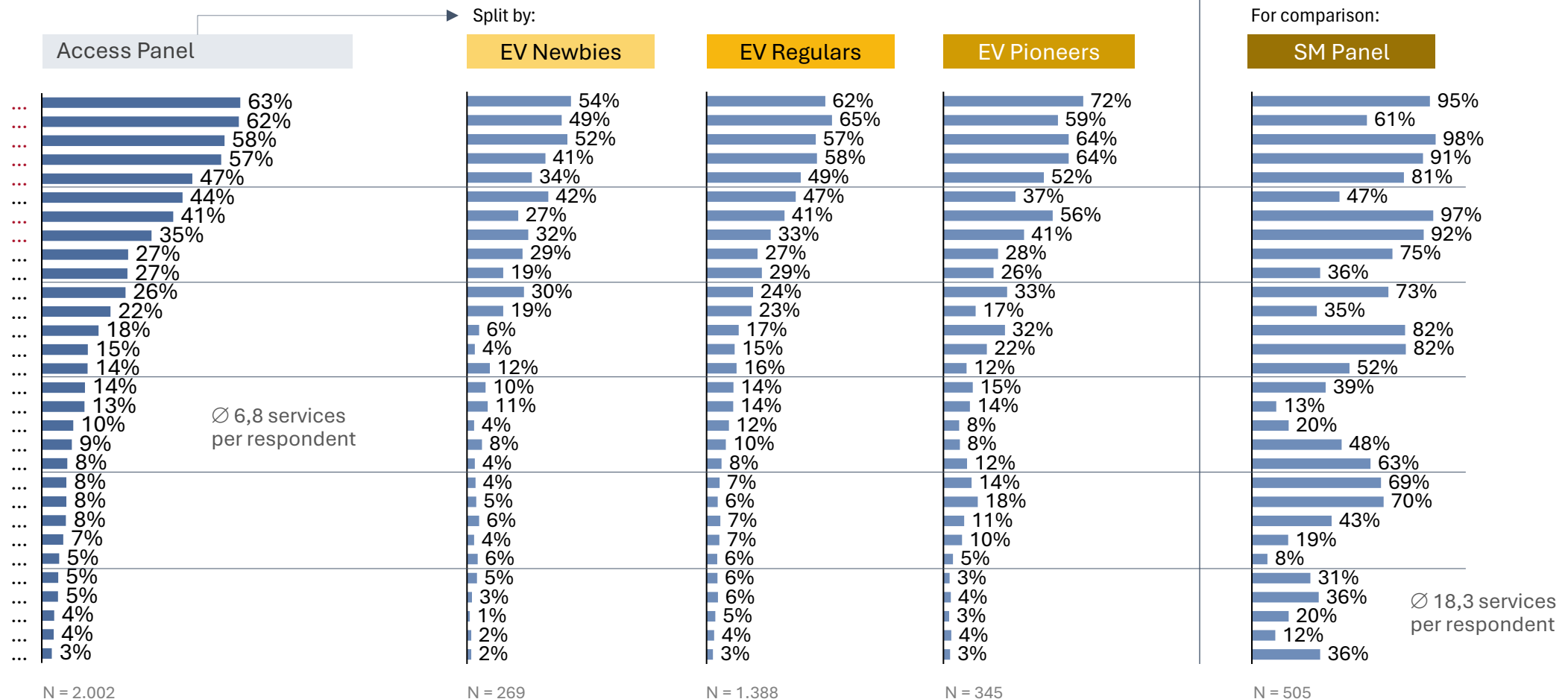


Awareness

Charging service provider awareness (prompted)

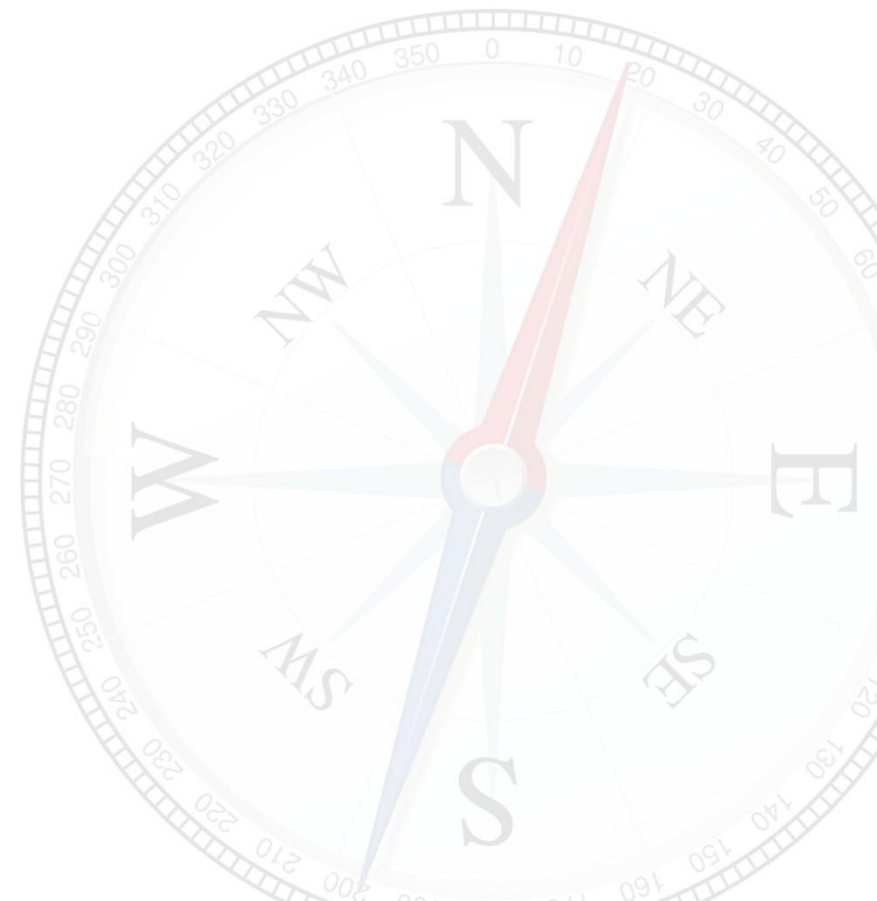
Even when it comes to supported lying-down positions (apart from the OEM Charging Service), the same providers occupy the top seven places.

“Which of the following charging service providers are you familiar with? (regardless of whether you have used the provider yourself)”



Contents

1. Management summary ➡
2. Methodology ➡
3. Charging behavior ➡
- ▶ 4. Customer journey to the charging service provider ➡
 - Touchpoints and information behavior
 - Provider awareness
 - Selection decision (Conjoint analysis)
5. Charging service providers of choice (users) ➡
 - Actively used providers
 - Preferred providers
 - Reasons for preference and loyalty
6. Charging service providers of rejection (non-users) ➡
 - Disposition and consideration (unengaged, open, considerer)
 - Sentiment, perception and positioning
 - Reasons for rejection and churn
7. Charging service provider profiles (fact sheets) ➡
8. Demographics, living situation, EV and driving habits ➡



Conjoint analysis

(introduction to the method)

The conjoint method depicts tariff selection as a compromise decision.

When choosing the right tariff, users weigh up several criteria before making a decision.

In order to determine which criteria influence the choice of tariff, participants in the survey were repeatedly presented with different tariff combinations from which they had to choose their preference.

Each offer consisted of a combination of several features that were compiled by an algorithm. The survey thus provided thousands of individual evaluations, which were analyzed using multivariate analysis.

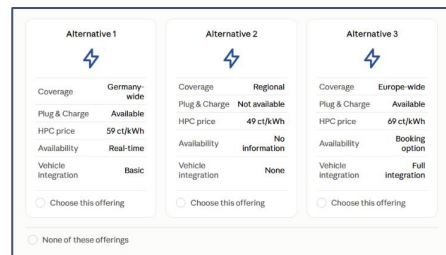
Example

Alternative 1		Alternative 2		Alternative 3	
					
Coverage	Germany-wide	Coverage	Regional	Coverage	Europe-wide
Plug & Charge	Available	Plug & Charge	Not available	Plug & Charge	Available
HPC price	59 ct/kWh	HPC price	49 ct/kWh	HPC price	69 ct/kWh
Availability	Real-time	Availability	No information	Availability	Booking option
Vehicle integration	Basic	Vehicle integration	None	Vehicle integration	Full integration
☐ Choose this offering		☐ Choose this offering		☐ Choose this offering	
☐ None of these offerings					

Conjoint analysis

(sample results)

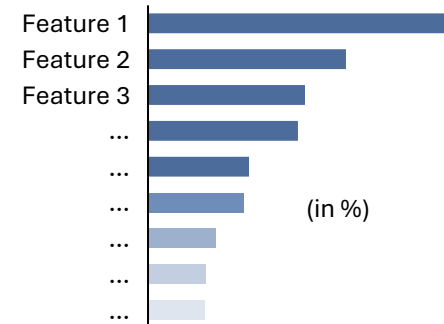
Simulation of user preferences



Example

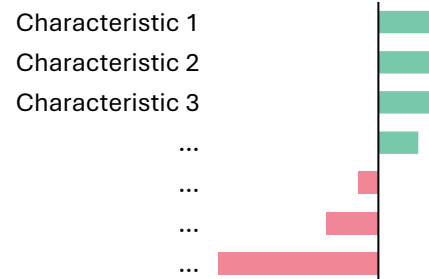
For the simulation, the market potential (using the rule of three) is estimated in comparison to its alternatives.

Importance of characteristics



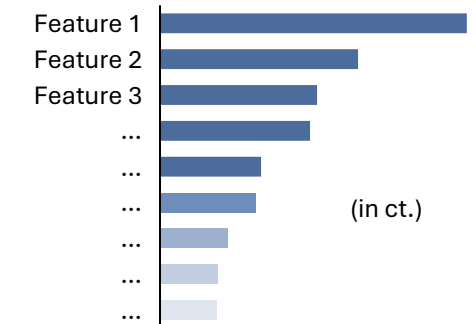
Calculation of partial utility values for each individual feature. The sum of all partial utility values is 100%.

Partial utility of characteristics



Part-worth utilities are centered on each attribute's mean, showing relative preference across its levels.

Willingness to pay



Willingness to pay reflects each respondent's calculated individual price premium for a given feature level relative to the base tariff.

CPO / eMSP selection decision (CONJOINT analysis)

Conjoint analysis

(instructions for the simulation tool*)

Calculation of the market potential of various charging offers

Conjoint results are not available in the Crunch dashboard.

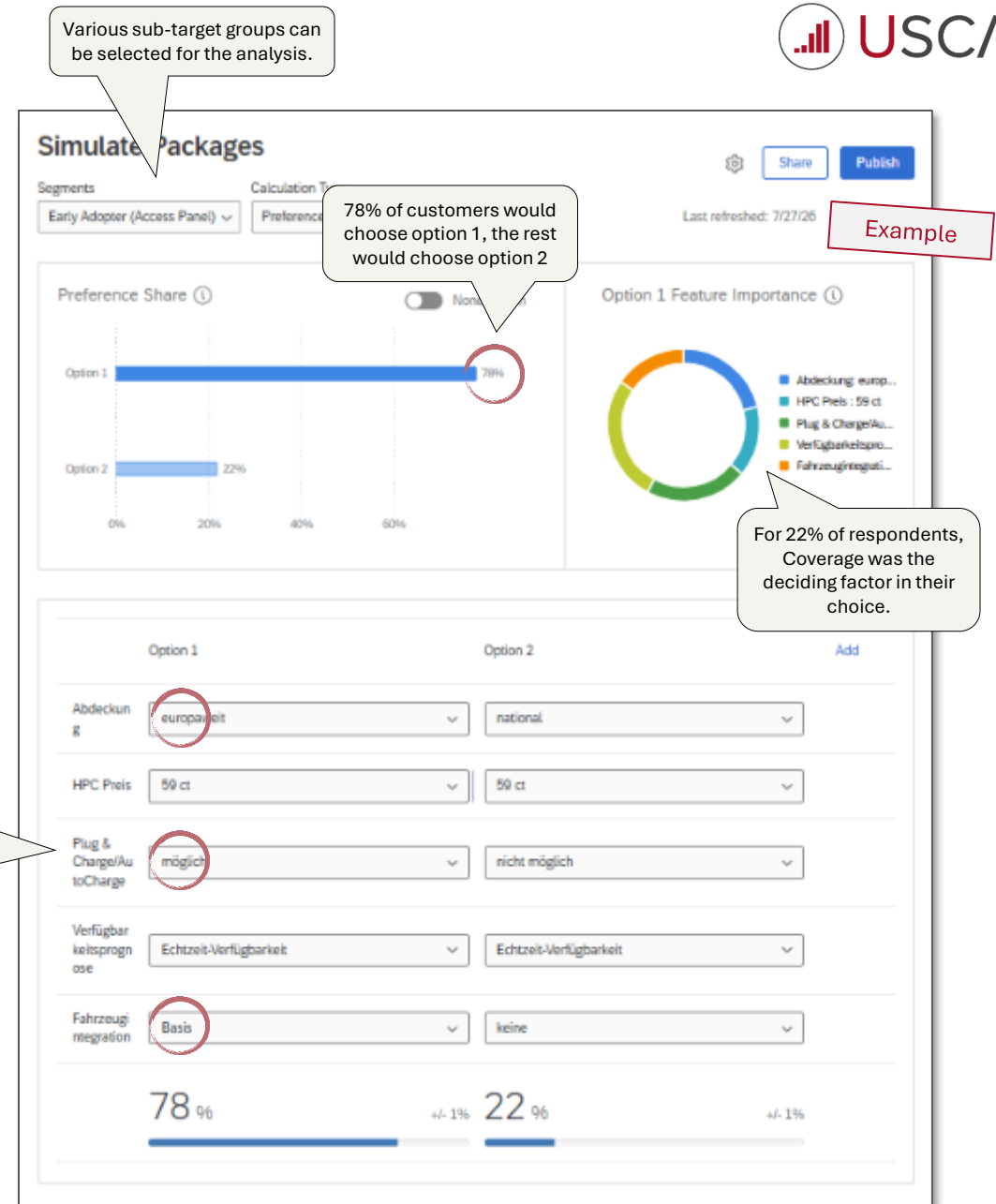
The potential market position of a product depends on the variety and attractiveness of competing offers. The market potential of an offer can therefore only be estimated in relation to its alternatives.

Since the variety of feature combinations and target groups is very large, the market potential is calculated in a simulation tool based on all the features surveyed.



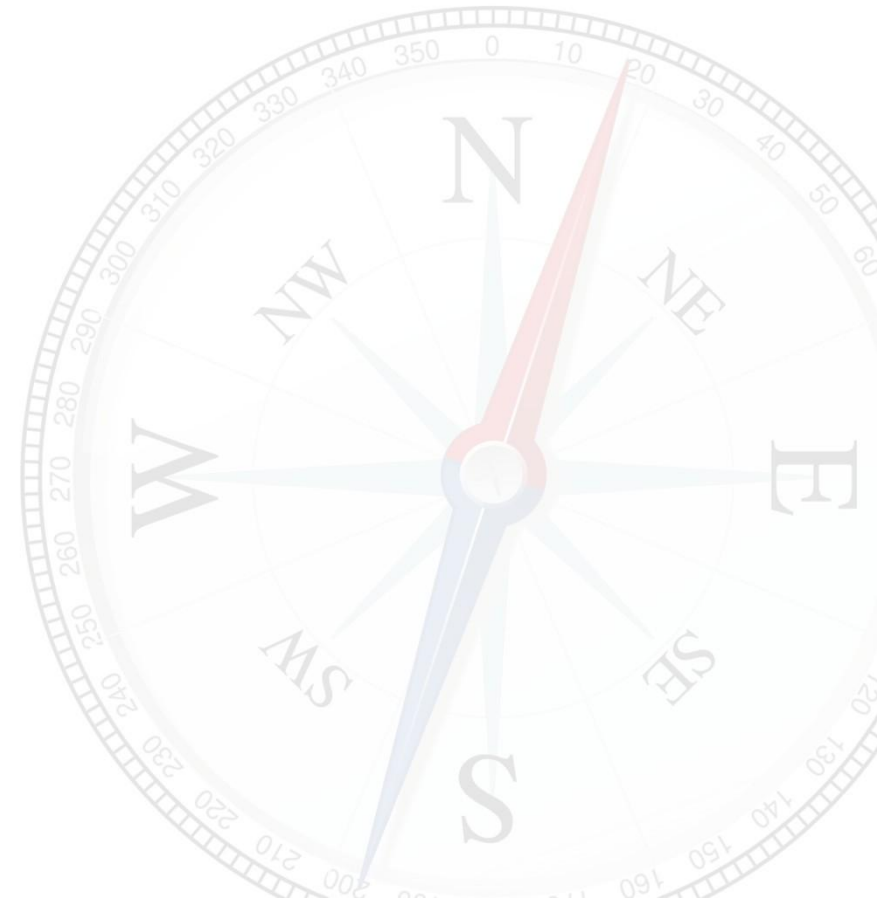
[LINK to the simulator](#)

* The simulation tool will be available until at least 26 December.



Contents

1. Management summary ➡
2. Methodology ➡
3. Charging behavior ➡
4. Customer journey to the charging service provider ➡
 - Touchpoints and information behavior
 - Provider awareness
 - Selection decision (Conjoint analysis)
- ▶ 5. **Charging service providers of choice (users) ➡**
 - **Actively used providers**
 - Preferred providers
 - Reasons for preference and loyalty
6. Charging service providers of rejection (non-users) ➡
 - Disposition and consideration (unengaged, open, considerer)
 - Sentiment, perception and positioning
 - Reasons for rejection and churn
7. Charging service provider profiles (fact sheets) ➡
8. Demographics, living situation, EV and driving habits ➡



Preliminary note on CPO / eMSP clustering

For the market-share analysis, providers are grouped together. Many brands play a dual role, e.g. acting as both a CPO and an eMSP. Classification was always based on the brand's actual role in the charging experience, not on its corporate ownership in the background.

This analysis uses the following classification:

1. Major utilities: E.ON Drive, EWE Go, mobility+ (EnBW), InCharge (Vattenfall), Lichtblick, Pfalzwerke
2. Oil majors: Aral pulse (including ADAC eCharge), Shell Recharge, TotalEnergies, Jet
3. Pure-play CPOs: IONITY, Fastned, Allego, Tesla
4. Roaming providers: Plugsurfing, Chargemap, ChargePoint, Elli, Octopus Electroverse
5. OEM charging services: all services offered by the car brands
6. Municipal utilities: all municipal utility providers, eCharge+, ladenetz.de, Ladeverbund plus, Tank-E-Netz
7. Company charging cards: e.g. DKV, UTA Edenred
8. Retail chains
9. Other: Cariqa, Moovility, PlugShare, leasing services (e.g. Sixt), other



Special cases:

- Tesla: Pure-play CPO, as it operates its own charging network (now open to other brands)
- Elli: Roaming provider rather than OEM charging, as WeCharge is the actual brand-specific VW product.
- Octopus Electroverse: Roaming provider despite its utility parent company (Octopus Energy); classification follows function.
- Circle K: Retailer, though a borderline case, as Circle K operates its own charging network/CPO.
- mblty (Autobahn Tank & Rast): Retailer, though a borderline case, as it has its own charging subsidiary with its own tariff model.
- EWE Go & Pfalzwerke: Classified as major rather than regional utility, as both offer combined contracts with home electricity, and their charging networks now reach nationwide via retail locations (McDonald's/Hornbach), even though ownership remains regional/municipal.
- LadeverbundPlus & Autostrom plus: Municipal/regional utilities, even though they are cooperations of several municipal utilities rather than individual companies.
- TEAG Mobil: Municipal/regional utility, even though it is majority-owned by the E.ON Group.

Actively used providers

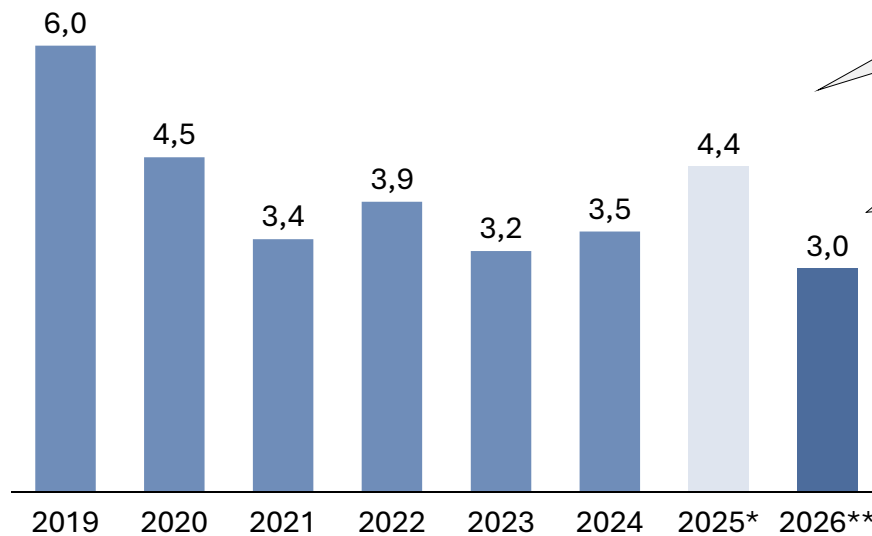
Number of actively used service providers

The number of actively used CPOs or eMSPs has decreased to approx. just 3 on average. The number of services used increases with growing experience, though Pioneers show that this number decreases again after a longer usage period.

“Total: Which charging services do you actively use?”

By ‘charging service’, we mean the providers whose charging app, charging card or charging point you use to pay. If you also pay directly, please select the providers whose charging points you regularly use.”

(Multiple answers possible)



N = 2.002 (2026)



The increase in 2025 was due to the change in how charging services were presented (app logos instead of a text-based list). The figures are therefore not comparable with the results from other years.



30% report using an OEM-branded charging service, up from 9% last year. This is likely partly due to the car brand being explicitly named in the question for the first time this year. Additionally, Aldi, Lidl and Edeka were explicitly surveyed in 2026 (35% in total). Last year, the study just asked for “retail” (10%). Adjusted for both effects, the rate would be approx. 2.6%, the lowest value compared to previous years.

Split by:

EV Newbies:	2,4
EV Regulars:	3,2
EV Pioneers:	2,8

* The option to select from provider icons (rather than a list of providers) resulted in a higher number of mentions.

** OEM offers were listed alongside the respondent's car brand, which led to a higher number of mentions in this category. Retailers were listed individually, which also led to a higher number of mentions in this category.

Actively used providers

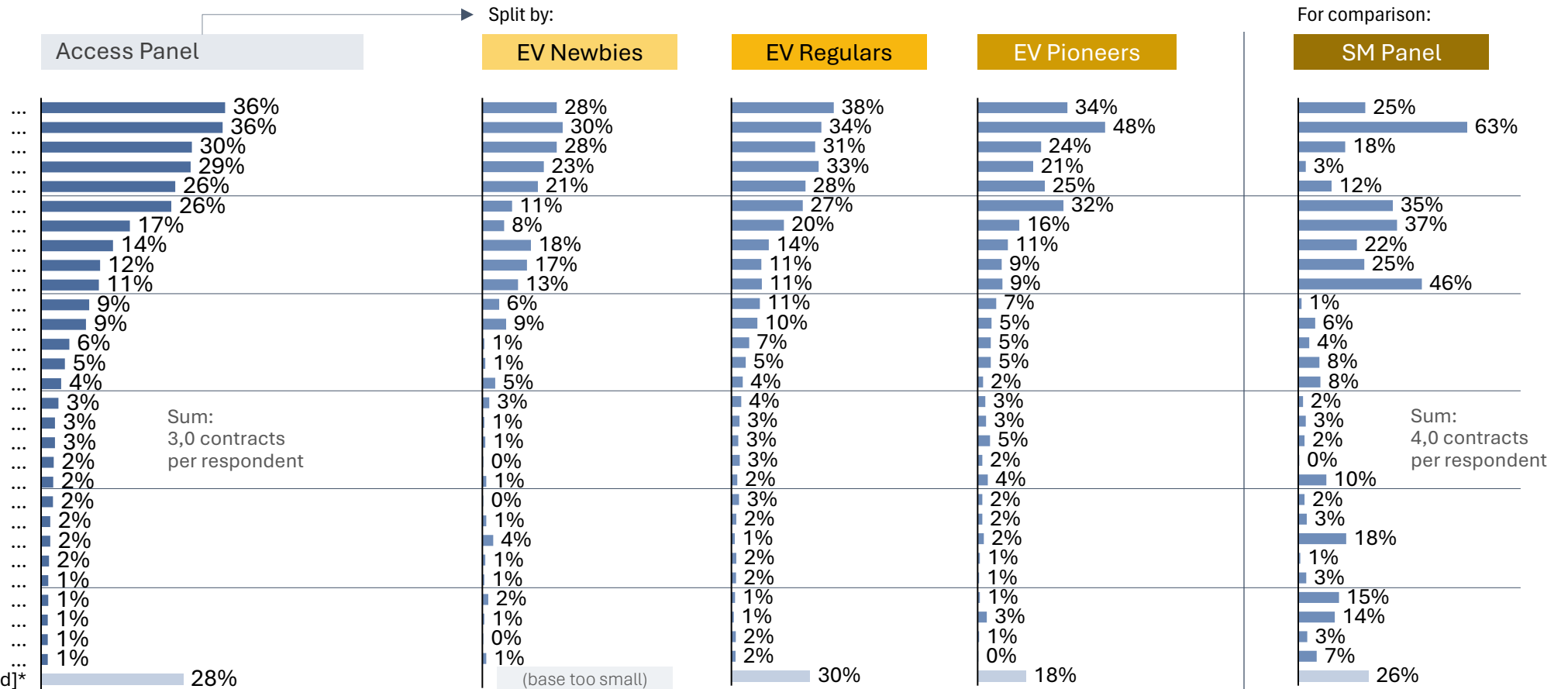
Actively used charging service providers

Compared with last year, ...and ... remain in first and second place. ... has dropped down the rankings. ... has moved up, while ... has fallen down the rankings.

“Total: Which charging services do you actively use?”

By ‘charging service’, we mean the providers whose charging app, charging card or charging point you use to pay. If you also pay directly, please select the providers whose charging stations you regularly use.”

(Multiple answers possible)



* only company car drivers

N = 147 - 2.002

N = 269

N = 88 - 1.388

N = 33 - 345

N = 95 - 505

Actively used providers

Usage situations

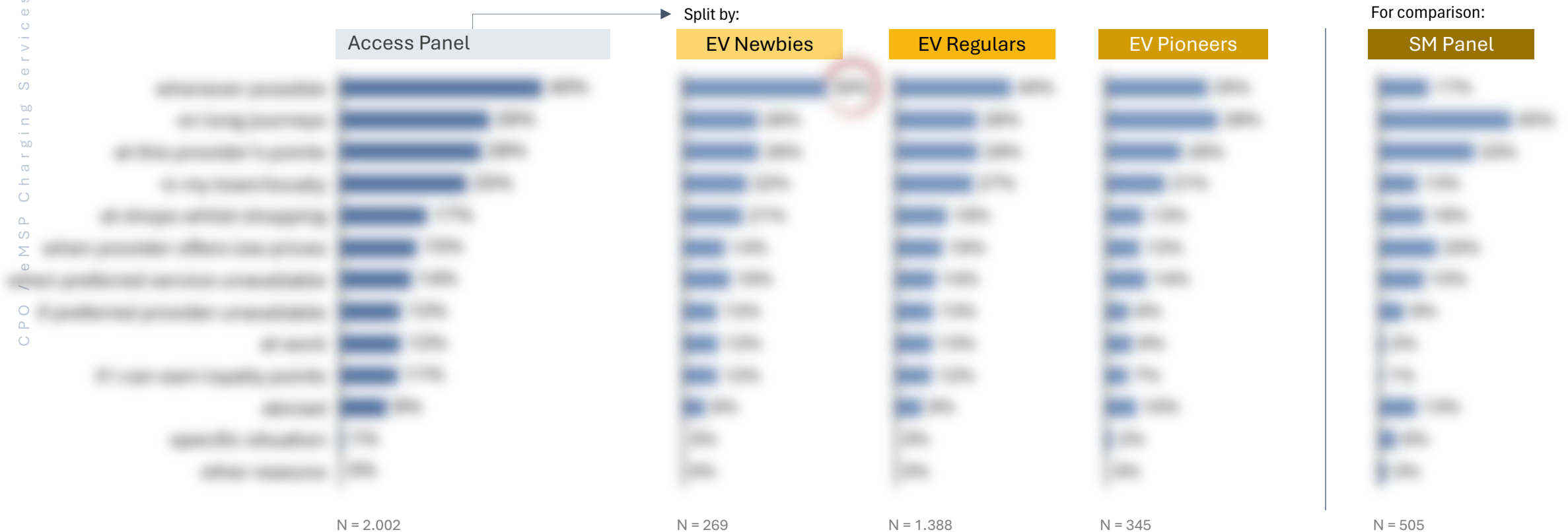
Provider = used
Maximum 3 (least-known-first routing):

“In which situations do you mainly use the selected charging services or apps?”

(Multiple answers possible)

For comparison:

CPO / eMSP Charging Services Study 2026



Actively used providers

Recommendation of charging service providers

Two-thirds of providers achieve a clearly positive NPS score of over 41 points*. Tesla leads the list by a clear margin, followed in second place by the (roaming) offers from OEM brands.

The average NPS scores indicate a surprisingly high level of satisfaction amongst new users:

EV Newbies	50
EV Regulars	40
EV Pioneers	38

Note:

The average NPS for the German Energy & Utilities sector is 16.8 points (as of August 2026, source: npsbench.com).



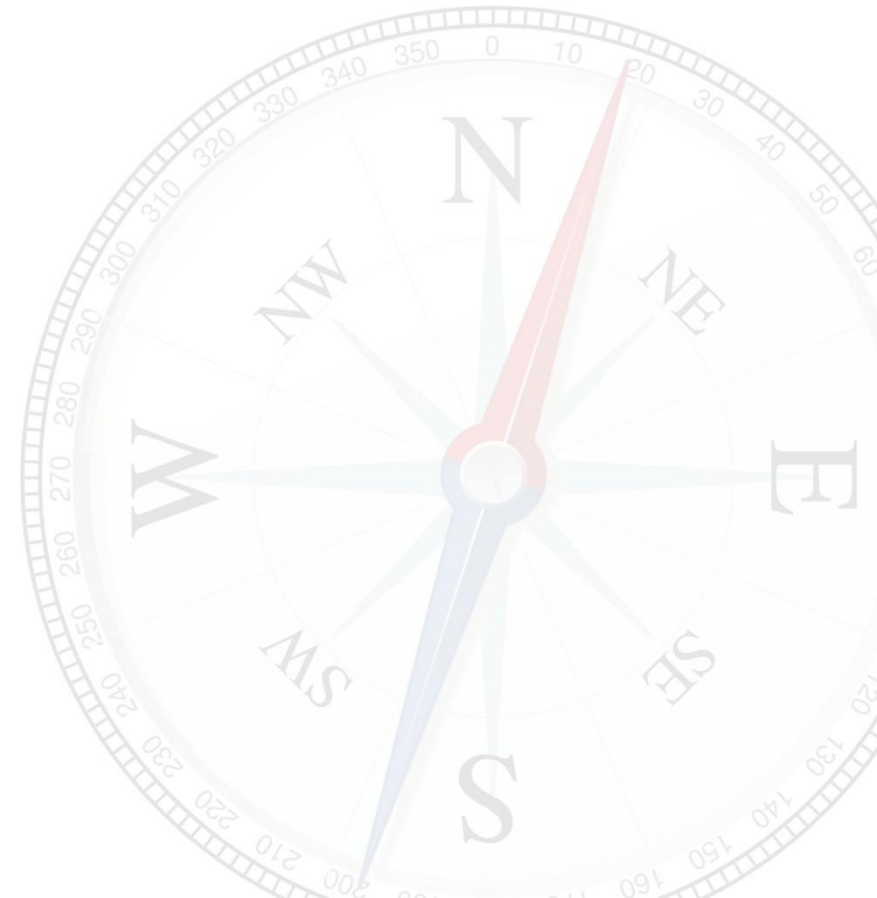
Access Panel only:

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

* Average NPS is weighted by base size (n) per provider.

Contents

1. Management summary ➞
2. Methodology ➞
3. Charging behavior ➞
4. Customer journey to the charging service provider ➞
 - Touchpoints and information behavior
 - Provider awareness
 - Selection decision (Conjoint analysis)
- ▶ 5. **Charging service providers of choice (users)** ➞
 - Actively used providers
 - **Preferred providers**
 - Reasons for preference and loyalty
6. Charging service providers of rejection (non-users) ➞
 - Disposition and consideration (unengaged, open, considerer)
 - Sentiment, perception and positioning
 - Reasons for rejection and churn
7. Charging service provider profiles (fact sheets) ➞
8. Demographics, living situation, EV and driving habits ➞



Preliminary note

To succeed in the charging services market, providers need to excel in two areas:

1

KPI: Active usage

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

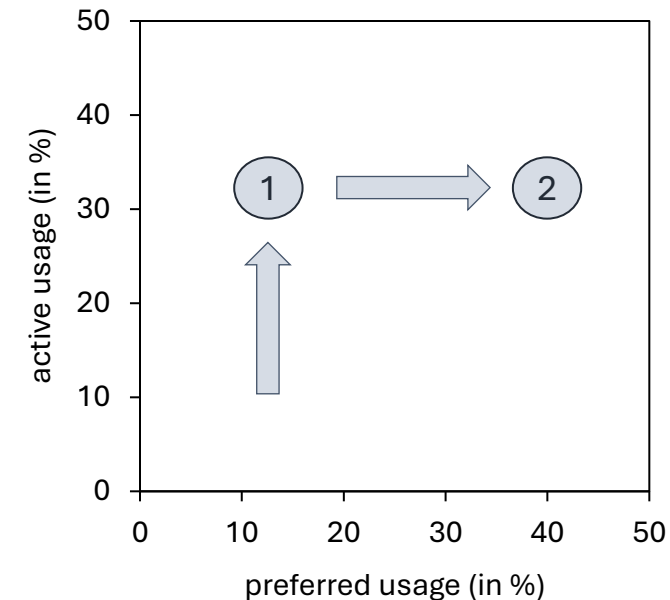
Providers must therefore ensure they are used at all, i.e. that EV drivers have a contract with them and use them at least occasionally.

2

KPI: Preferred usage

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

For success, it is important that EV drivers use a service not just occasionally, but as their preferred choice.



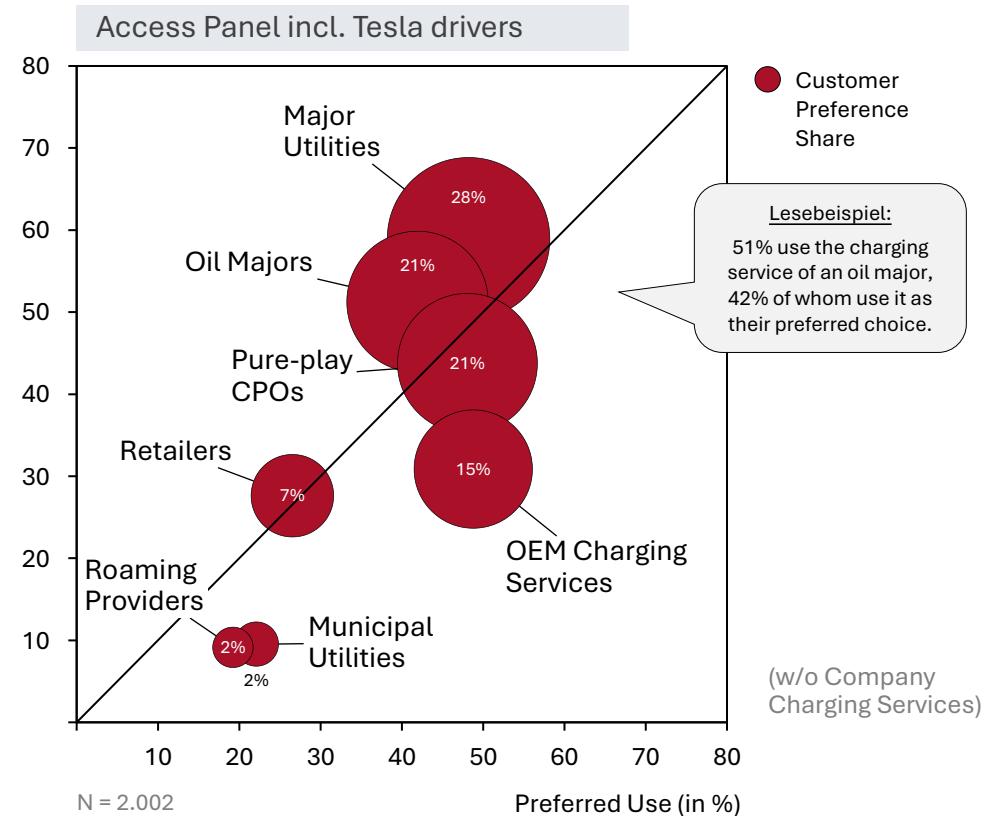
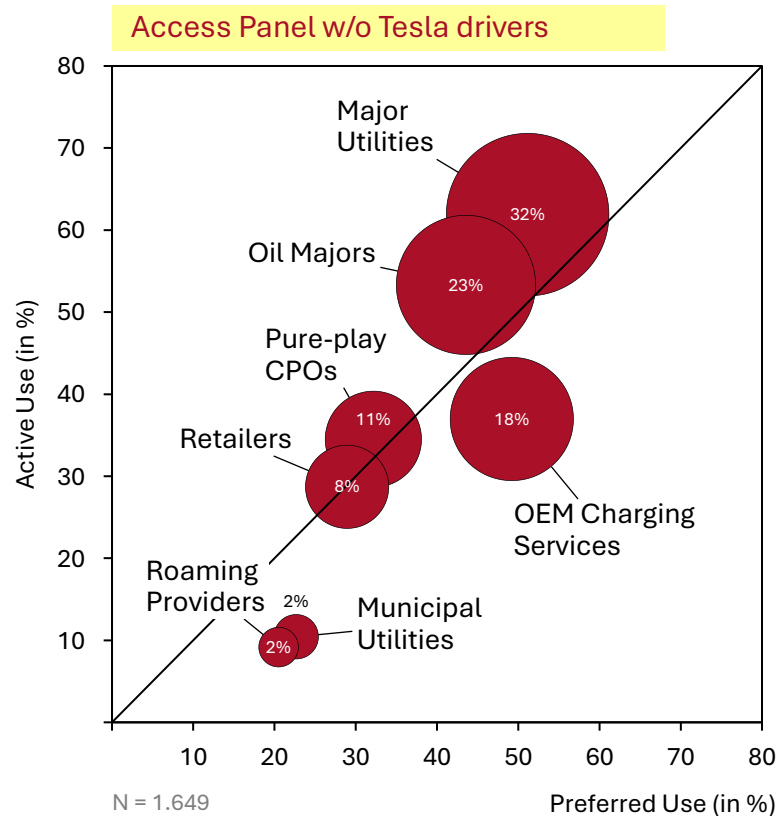
Preferred providers

Customer preference shares

Utilities still account for the largest share of customer preference, closely followed by the oil majors and – neck and neck – the pure-play CPOs. However, Tesla accounts for a significant proportion of the pure-play CPOs. Retailers are catching up, while municipal utilities and non-OEM-affiliated roaming services remain niche players.

“Which charging services do you actively use?”
vs.

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



Preferred providers

Customer preference shares by customer segment

(w/o Tesla drivers)

Customers have a strong preference for utilities in the current charging market. The oil majors and other providers also play an important role. Residents are also attracted to convenience, although some still prefer to use public charging.

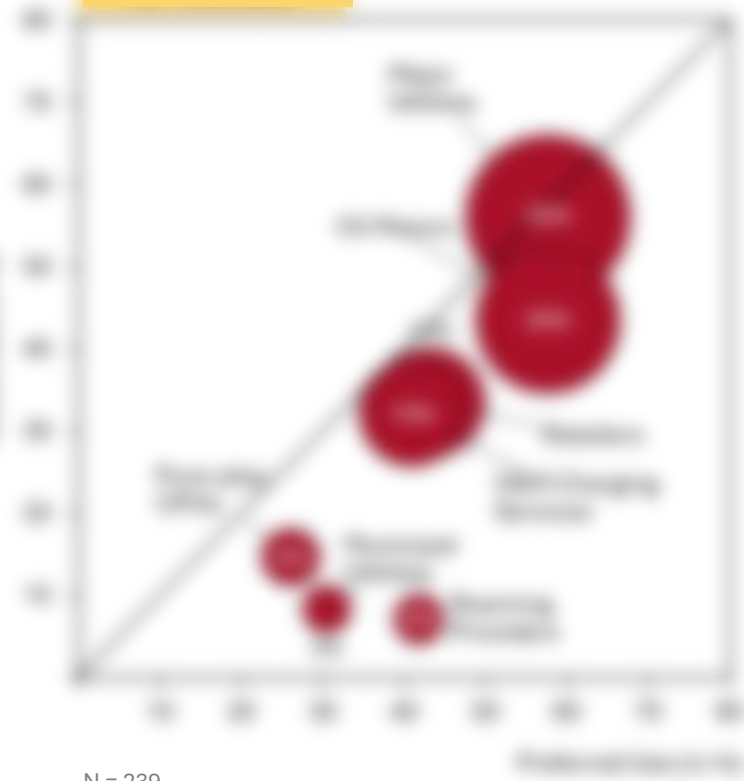
“Which charging services do you actively use?”
vs.

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

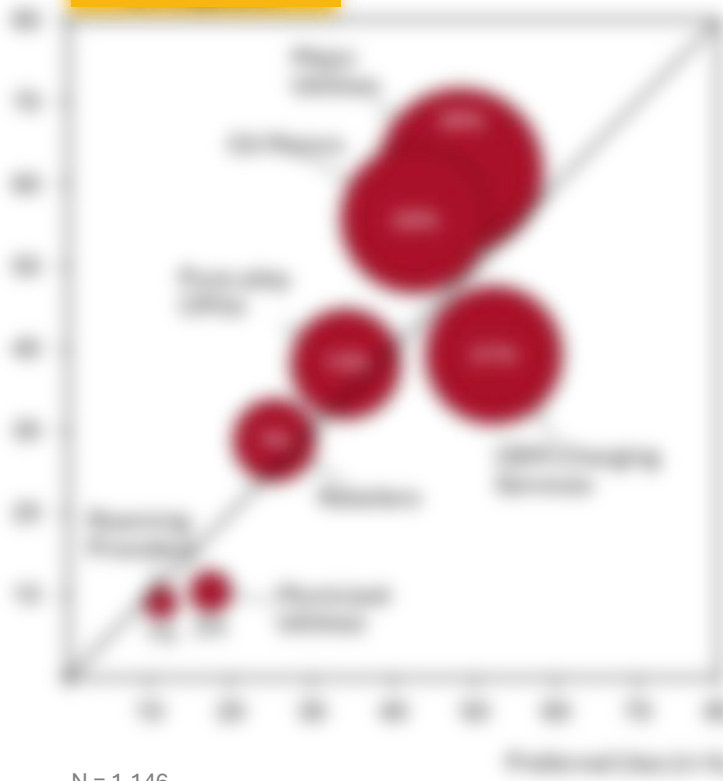
EV Newbies

EV Regulars

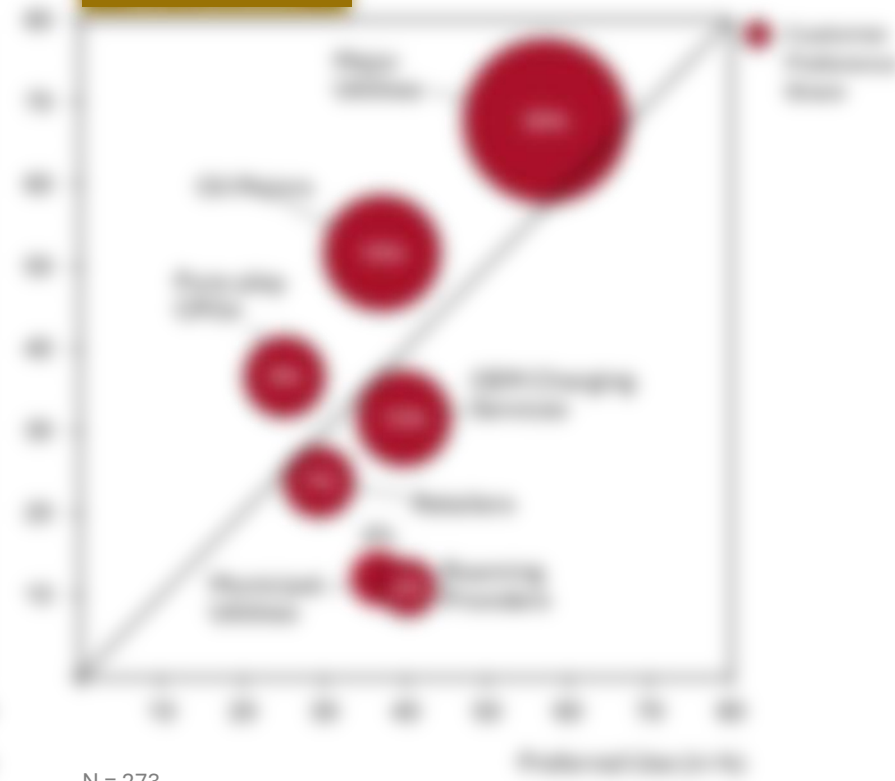
EV Pioneers



N = 239



N = 1.146



N = 273

(w/o Company Charging Services)

Charging service provider profiles

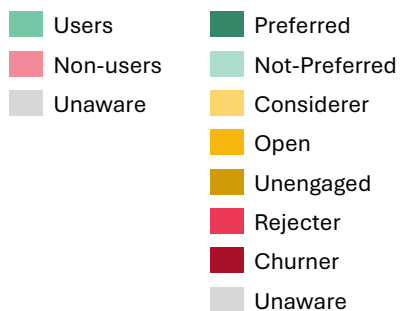
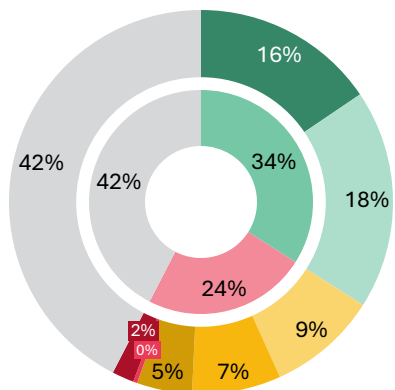
Fact sheet: EnBW mobility+ (All Access Panel)



EnBW mobility+ preferred users are more often _____. They more often come from the segment of _____.

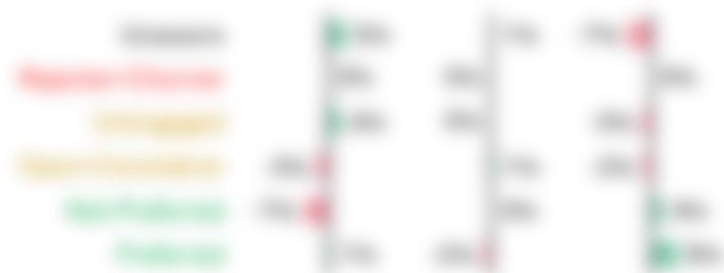
All (Access Panel)

Usage
shares:



EV Experience:

Newbies Regulars Pioneers



Charging Profiles:

Homebodies Commuters City Dwellers Opportunity Chargers High-Mileage Drivers



Household Income:

< € 3,000 € 3 - 5,000 € 5,000 +



Generations:

Gen Z Gen Y Gen X Boomer



Bar charts show delta relative to average (in percentage points)

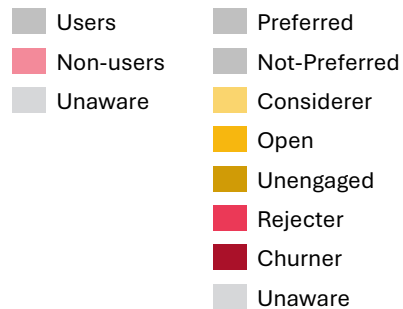
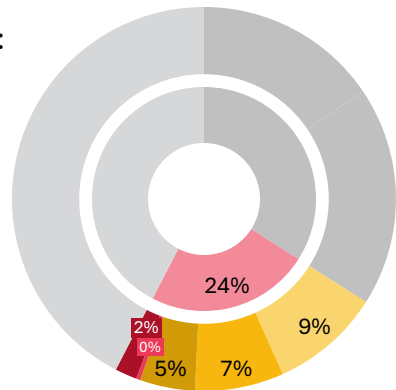
Charging service provider profiles

Fact sheet: EnBW mobility+ (Non-users)



Non-users rate mobility+'s ___ as very good and its ___ as favorable.
Non-user sentiment ratings are clearly positive.

Non-Users
Usage
shares:



Non-users
Reason for non-usage:



Non-users
Service positioning:



Non-users
Sentiment:



Bar charts show delta relative to average (in percentage points)

Charging service provider profiles

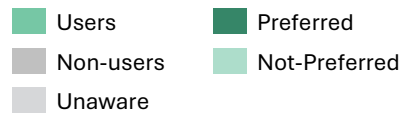
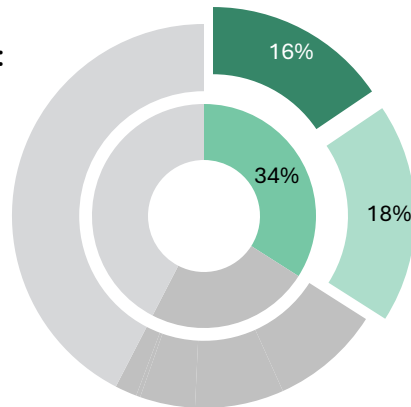
Fact sheet: EnBW mobility+ (Active users)



Mobility+ is used more often _____. The NPS score is high at 43 points.
Detractors mainly cite _____.

All (Access Panel)

Usage
shares:



Active usage = yes

Usage situation:

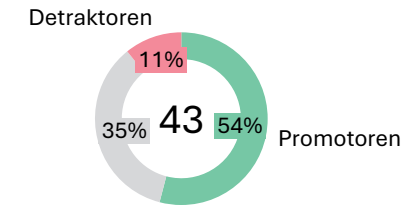


Usual Authorisation:



Active usage = yes

Net Promotor Score (NPS):



Reasons against recommendation:



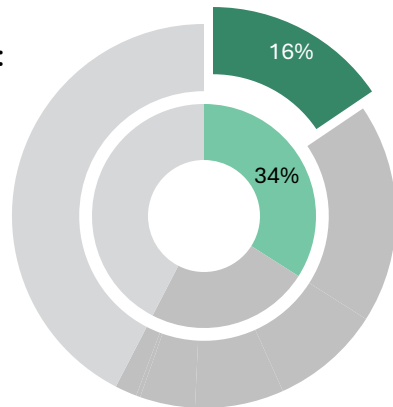
Charging service provider profiles

Fact sheet: EnBW mobility+ (Preferred users)



Preferred users of mobility+ cite many reasons for their preference, above all ____.
The decision was more often the result of ____.

All (Access Panel)
Usage
shares:



■ Users
■ Non-users
■ Unaware
■ Preferred

Preferred usage = yes
Reasons for Preference:



Preferred usage = yes
Moment of provider choice:



Preferred usage = yes
Decision Trigger:





SCALE YOUR USER
SCALE YOUR BUSINESS



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