

Electric Vehicle Landscape and Consumer Sentiment Research

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Objectives & Methodology

Objectives

- This study seeks to identify key markets where electric vehicles (EVs) are currently being implemented, measure consumer awareness of EV technologies and capabilities, understand consumer use of already available EVs and gauge consumer sentiment toward future integration and use of EVs.

Methodology

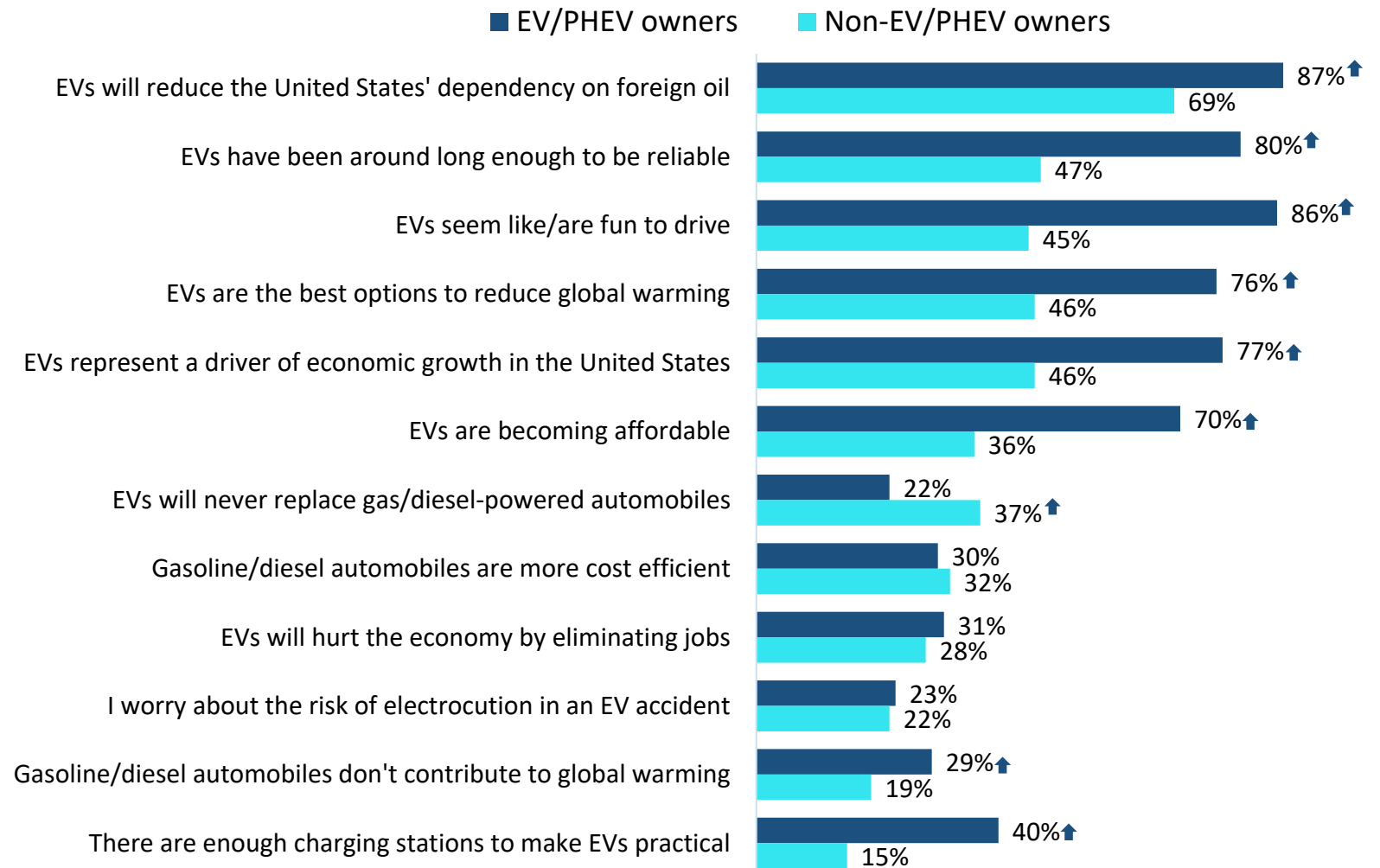
- The Consumer Technology Association (CTA)™ designed and formulated this report. It represents findings from a combination of background/secondary research as well as a quantitative survey administered via internet to an online national sample of 2200 U.S. adults (n=2000 non-EV/plug-in hybrid [PHEV] owners and n=200 current EV owners). Overall sample demographics can be found within the [Appendix](#) of this report. While fielding this study, CTA employed the services of Aspen Finn to provide a nationally representative panel of online households.
- CTA is a member of the Insights Association (IA) and adheres to the research and analysis guidelines set forth in the MRA Code of Marketing Research Standards and CASRO Code of Standards and Ethics.



Non-owners are not convinced about EV reliability or practicality

While most agree that EVs will help reduce dependence on foreign oil supplies, less than half of non-EV/PHEV owners think EVs are a good option for addressing global warming or driving economic growth. Only 36% feel EVs are becoming affordable, and 37% don't think EVs will replace gas-powered cars.

Attitudes Toward Electric and Gasoline/Diesel Automobiles Top Two Box; Agree/Strongly Agree

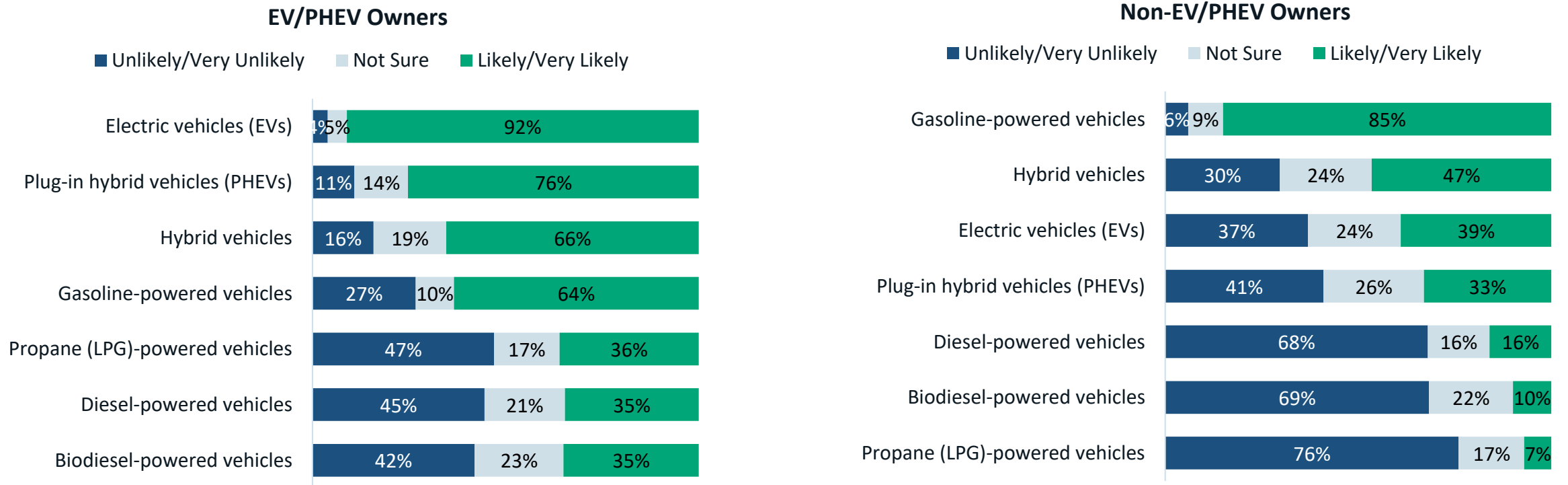


Q. Please tell us how much you agree or disagree with the following statements? Base: Total respondents N=2200

↑ Denotes a statistically significant difference at the 95% confidence level

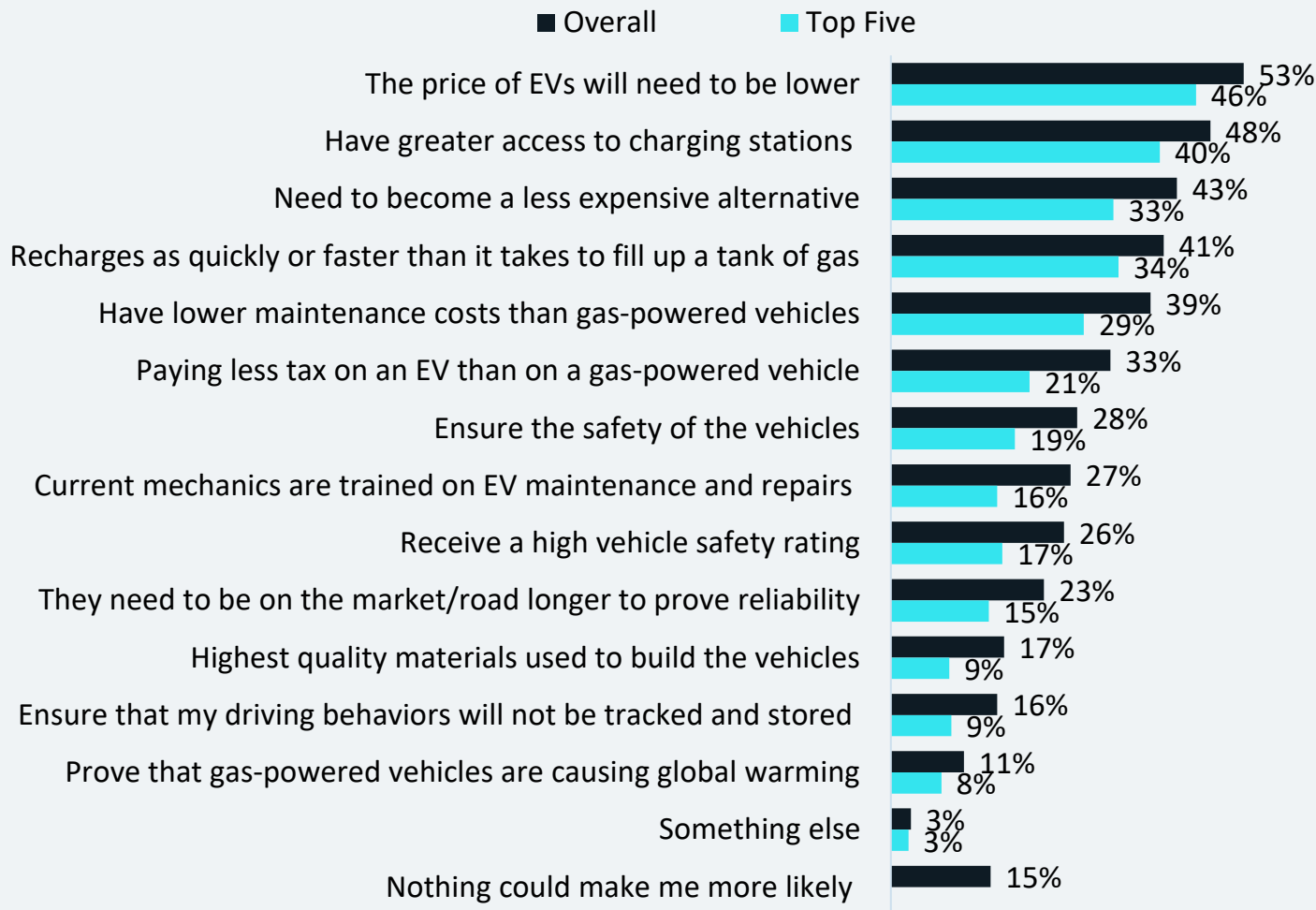
Non-EV owners are likely to stay with a gasoline-powered car, but many would consider a hybrid or EV

Likelihood to Consider Purchasing (Ranked by “Likely/Very Likely”)



Q. How likely are you to consider the following types of vehicles for your next purchase of an automobile? Base: EV/PHEV owner N=200; non-EV/PHEV owner N=2000.

What Could Increase Likelihood to Consider Purchasing a BEV?

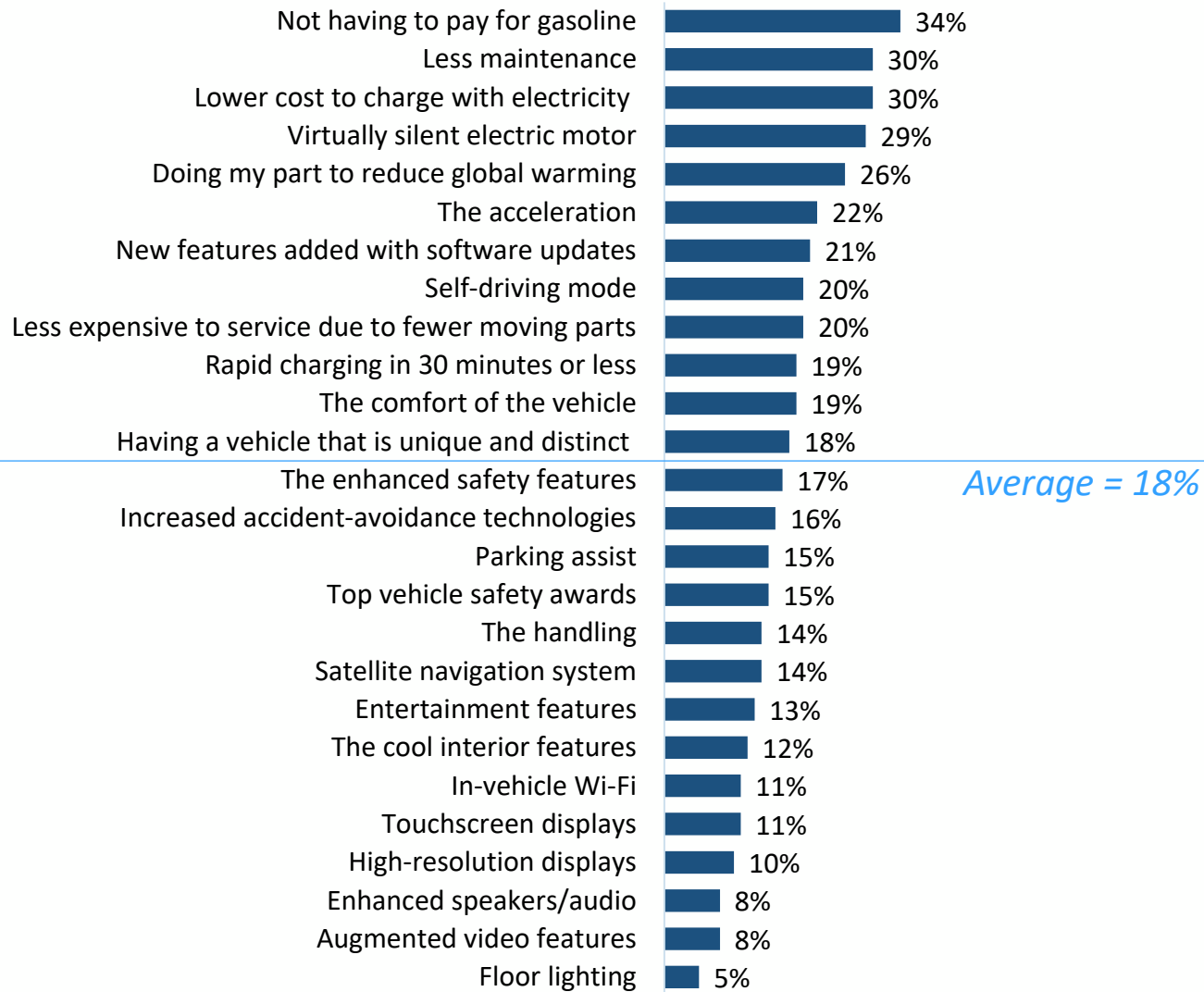


Q. What would make you more likely to consider purchasing a BEV? Q. Which of these are the most likely to increase the likelihood you would consider a BEV? (top five) Base: Non-EV/PHEV owner N=2000

Addressing the limitations will increase BEV consideration

- The top triggers of increasing consideration for BEVs are directly tied to the perceived limitations of cost and perceived challenges of recharging the vehicles away from home.
- Lowering the cost of BEVs (46%) and making it a less expensive alternative (33%) are two of the four top triggers for consideration.
- Increasing access to charging stations (40%) and decreasing charging time to be equivalent to filling up a tank of gas (34%) are the other top two triggers for consideration.

Favorite Aspects of Owning an EV/PHEV



Ownership benefit preferences vary across EV owners

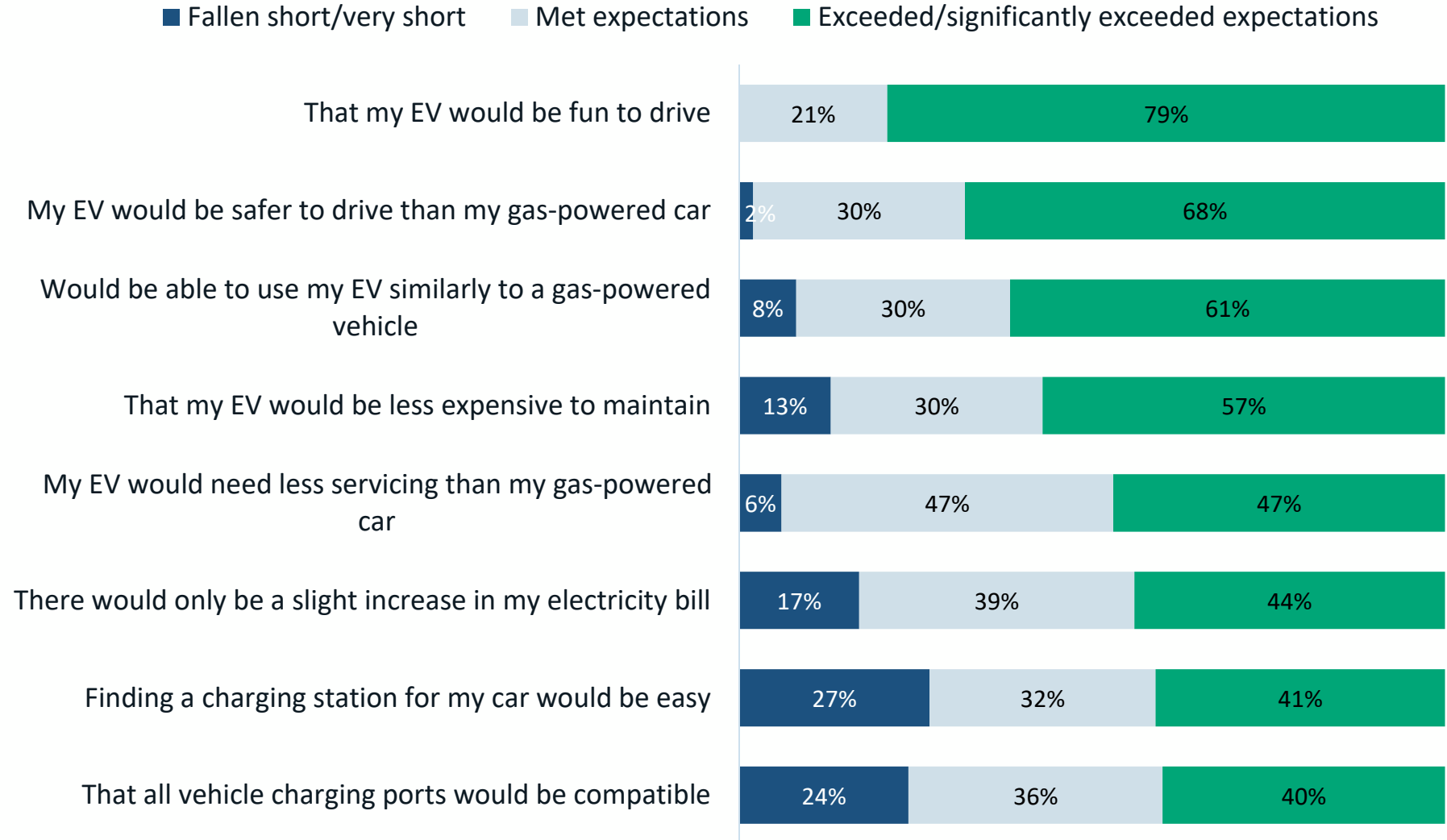
Not having to pay for gas, less maintenance, lower cost to charge with electricity and a silent motor were the favorite elements of EV or PHEV ownership, with about one-third of owners mentioning these aspects.

Q. What are your top five favorite things about owning an EV? Base: EV/PHEV owner N=200

EVs and PHEVs have exceeded expectations

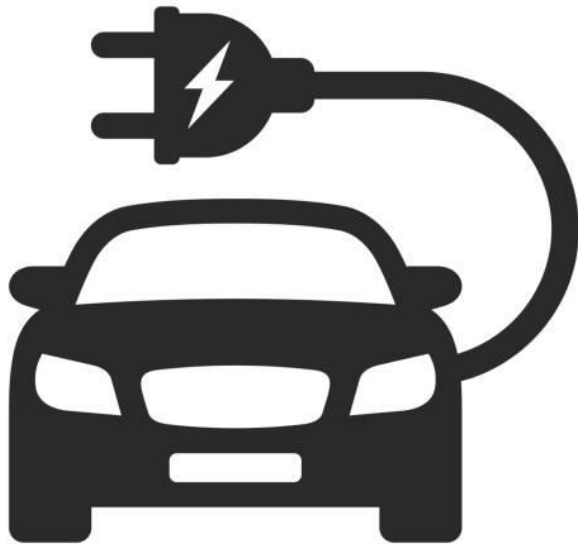
EV owners were the most surprised their cars would be as fun (exceeded expectations at 79%) and safe to drive (exceeded expectations at 68%).

How EV/PHEV Has Lived Up to Expectations

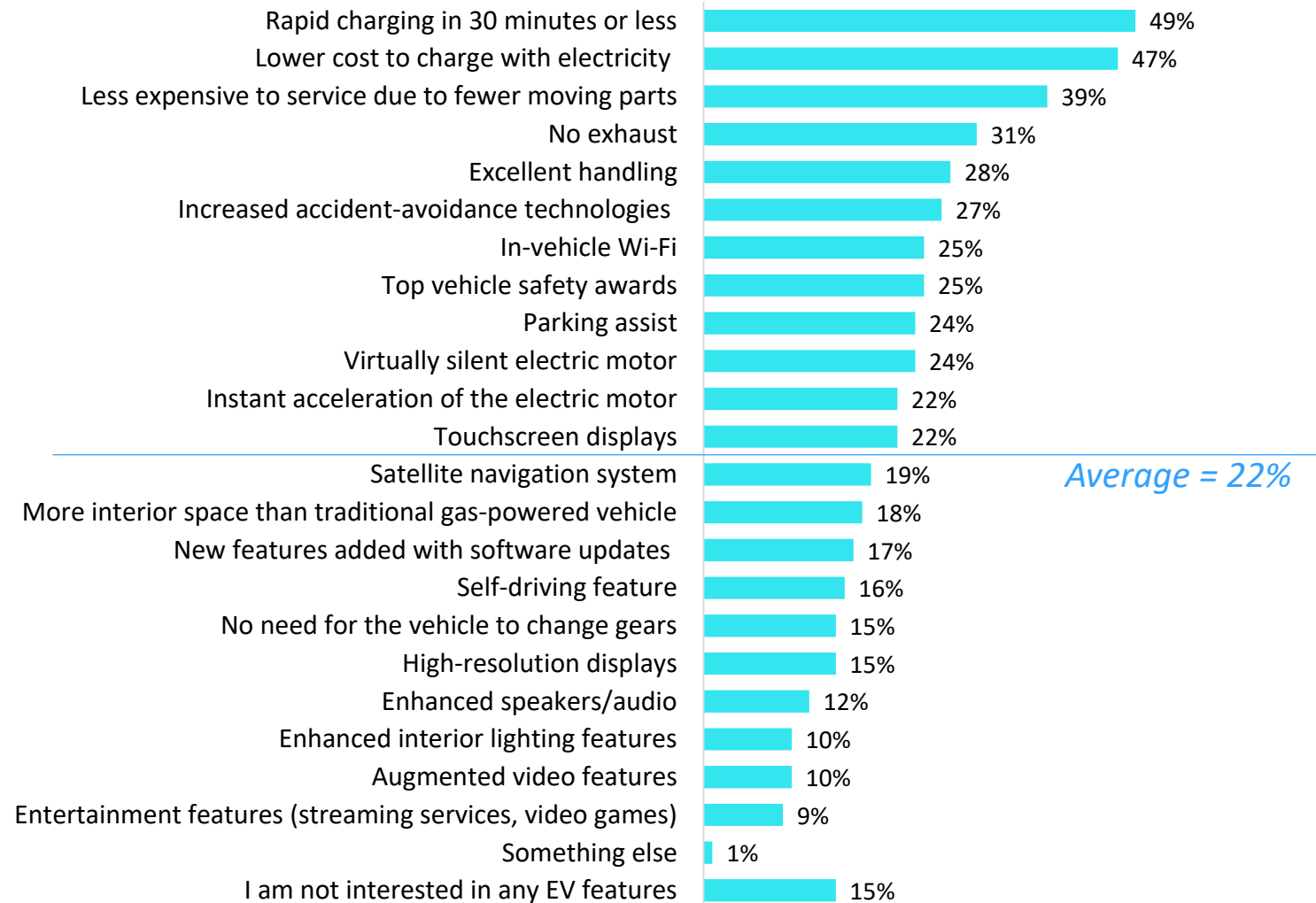


Q. How well has your EV experience lived up to your expectations? Base: EV/PHEV owner N=200

Rapid charging, lower cost to charge and lower maintenance costs are features that will drive the most interest among non-EV owners



Features That Create Interest Among Non-EV Owners



Q. Which of the following features of an EV, BEV or PHEV are you the most interested in?
Base: Non-EV/PHEV owner N=2000

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