

Early Insights from “Your future vehicle choice”

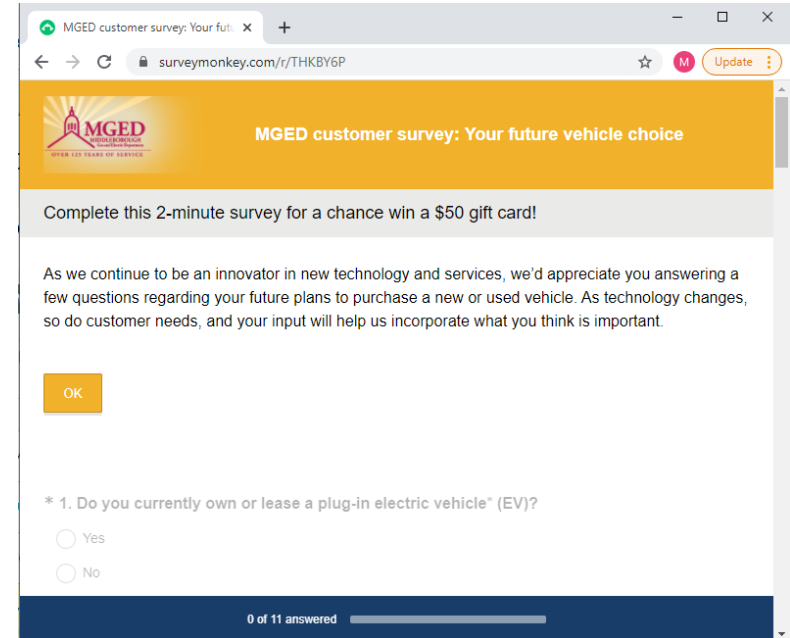


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Surveys conducted Jun-Oct 2020 by ENE for 6 Municipal Utilities (6 others have results pending)

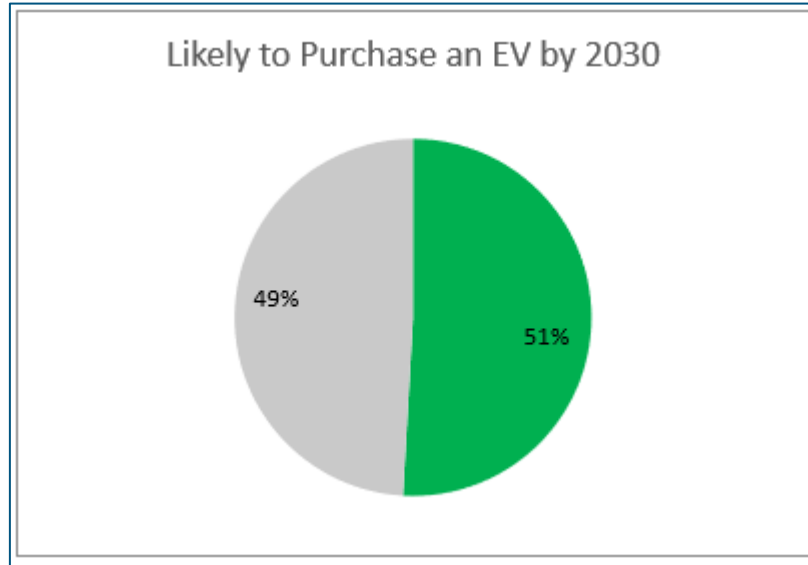
About the surveys

- Designed to build on previous surveys
- 6 municipal utility service areas in preliminary results shown
- Collected between June-Oct 2020
- At least 500 responses per survey
- Over 5,000 total responses
- Chance to win \$50 gift card or similar
- Data analyzed and provided to utility
- Also used as a marketing tool to:
 - Inform about EV incentives
 - Identify EV drivers/EV interested
 - Create EV email subscription list



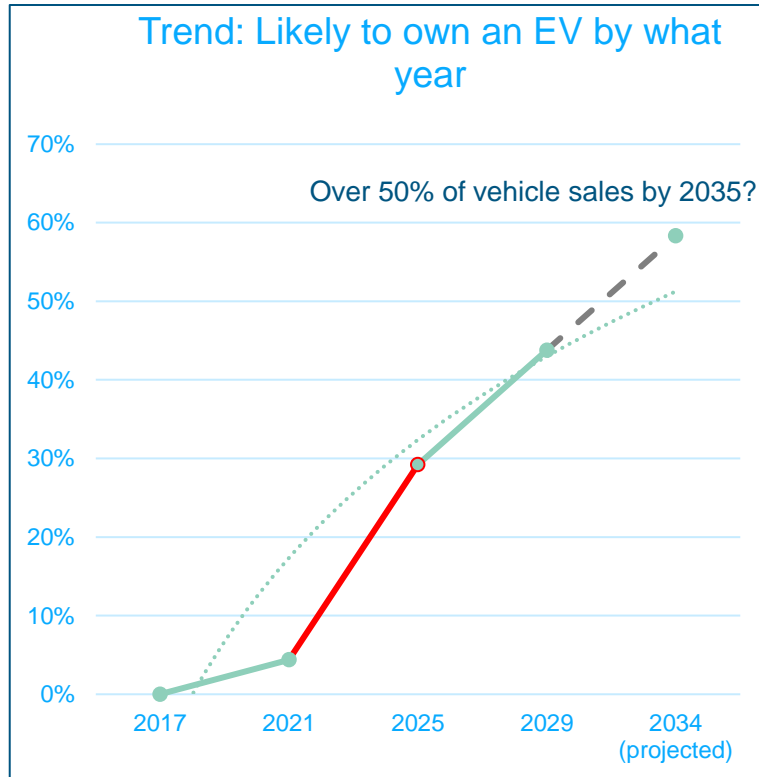
The screenshot shows a web browser window displaying a survey. The browser's address bar shows the URL 'surveymonkey.com/r/THKBY6P'. The survey header is orange and features the MGED logo (Michigan Gas & Electric Division) and the text 'MGED customer survey: Your future vehicle choice'. Below the header, a grey box contains the text: 'Complete this 2-minute survey for a chance win a \$50 gift card!'. The main content area has a white background and contains the following text: 'As we continue to be an innovator in new technology and services, we'd appreciate you answering a few questions regarding your future plans to purchase a new or used vehicle. As technology changes, so do customer needs, and your input will help us incorporate what you think is important.' Below this text is an orange 'OK' button. The survey question is: '* 1. Do you currently own or lease a plug-in electric vehicle* (EV)?'. There are two radio button options: 'Yes' and 'No'. At the bottom of the survey, a dark blue bar shows a progress indicator: '0 of 11 answered'.

Likely to Purchase an EV by 2030?



- Over half of respondents by 2030
- Ranged from 34% to 72%
- ~1/3 to >2/3 of respondents
- A municipality's socioeconomic demographics have a strong influence on this percentage

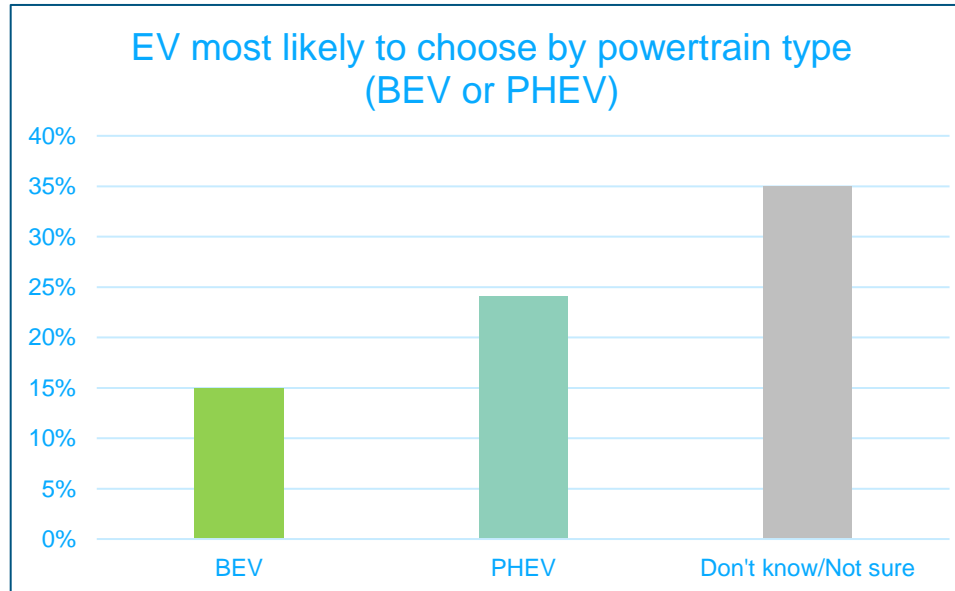
Year likely to purchase an EV



- Unexpected “**Bump**” in likely EV adoption from 2022-2025
- Future **steady growth**, or will there be future “bumps”?
- 1/3rd not likely to get an EV until after 2030 – see barriers
- **1/5th answered “I don’t know” = active EV outreach = *marketing* to could increase adoption by 20%**
- Customers still to learn more & receive reassurance

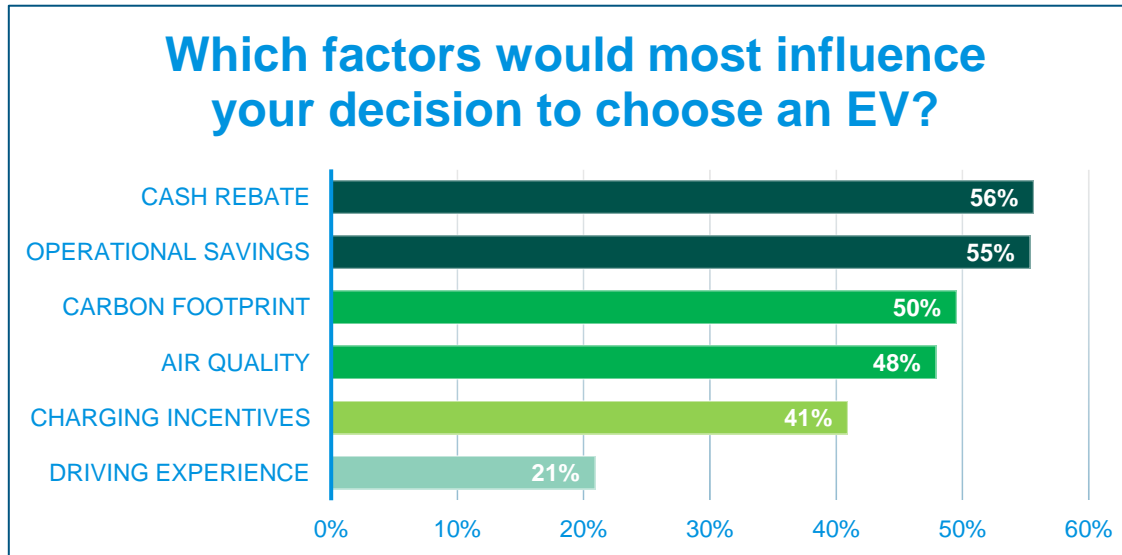
Type of EV likely to choose

- 15% would choose a BEV (ranged from 10% to 23%)
- 24% would choose a PHEV (ranged from 17% to 29%)
- **35% Don't know/not sure – shows value of EV finder tools**



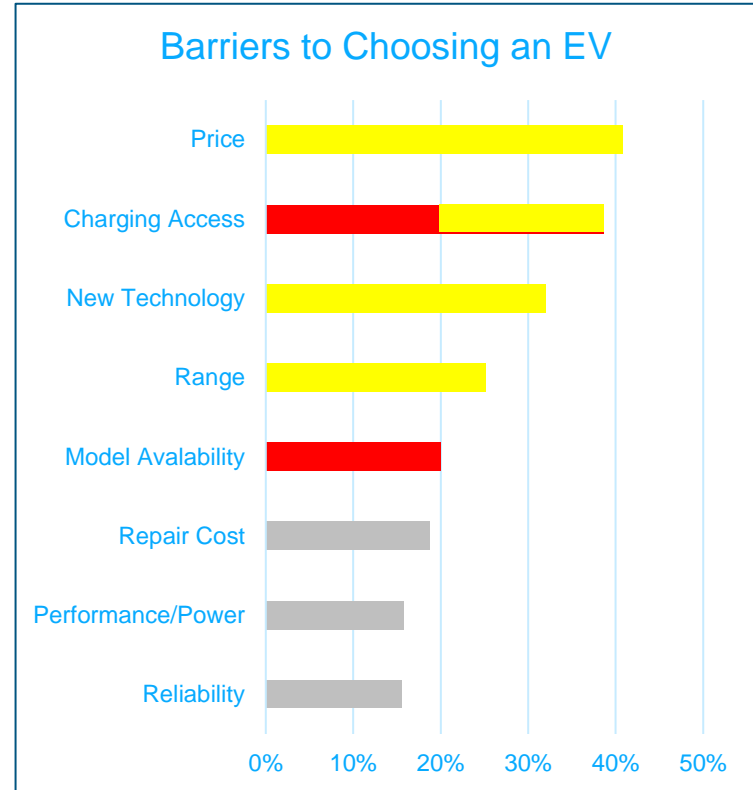
Purchase influence factors

- Purchase rebates and operational savings top factors
- Carbon footprint & air quality also important to half of drivers
- Charging incentives less a factor however influence TCO
- Customers needs tools to calculate financial & emissions savings



Barriers to EV Adoption

- Price tops barriers, so customers need to see affordability & savings
- Charging access, like price, can be a **real** barrier or may only be a **barrier of perception**
- Range only a concern for ~1/4 of respondents (encouraging to see)
- 1 in 5 not seeing the model they desire, a **hard stop** for adoption
- Concerns over repair cost, performance or reliability are lower
- Car buyers need to become more familiar with their available choices





ENE dEvelop

For more information on how we can help you get EV charge-ready, contact us!



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