



# Mobility Panel: Electric Vehicles



EV image from OregonDOT <http://www.flickr.com/photos/oregondot/5658675682/>

# Survey Context and Objectives

Enprecis, a leading provider of customer insight to the global automotive industry, has established a new feedback channel: **Mobility Panels**, the first smartphone surveys focused on automotive industry hot topics.

- Designed to assess the speed and reliability of mobile channels for gathering consumer data
- Leverages the latest technology to gather detailed consumer opinion faster than ever before
- A precursor to private mobile communities for automakers
- Highly convenient channel for consumer and automaker alike
- Smartphone users are an attractive demographic of early adopters
- Enprecis continues giving voice to the customer through additional Mobility Panels

# Survey Details and Methodology

- Data obtained using established network of iPhone users in United States
- Nearly 2000 responses (1762) collected in less than 12 hours on April 12, 2011
- Survey-addressed hot topics such as:
  - Electric vehicle purchasing
  - Electric vehicle driving and charging habits
  - Japan earthquake's impact on auto industry
  - Concerns about nuclear power after Japan earthquake

# Survey Responses



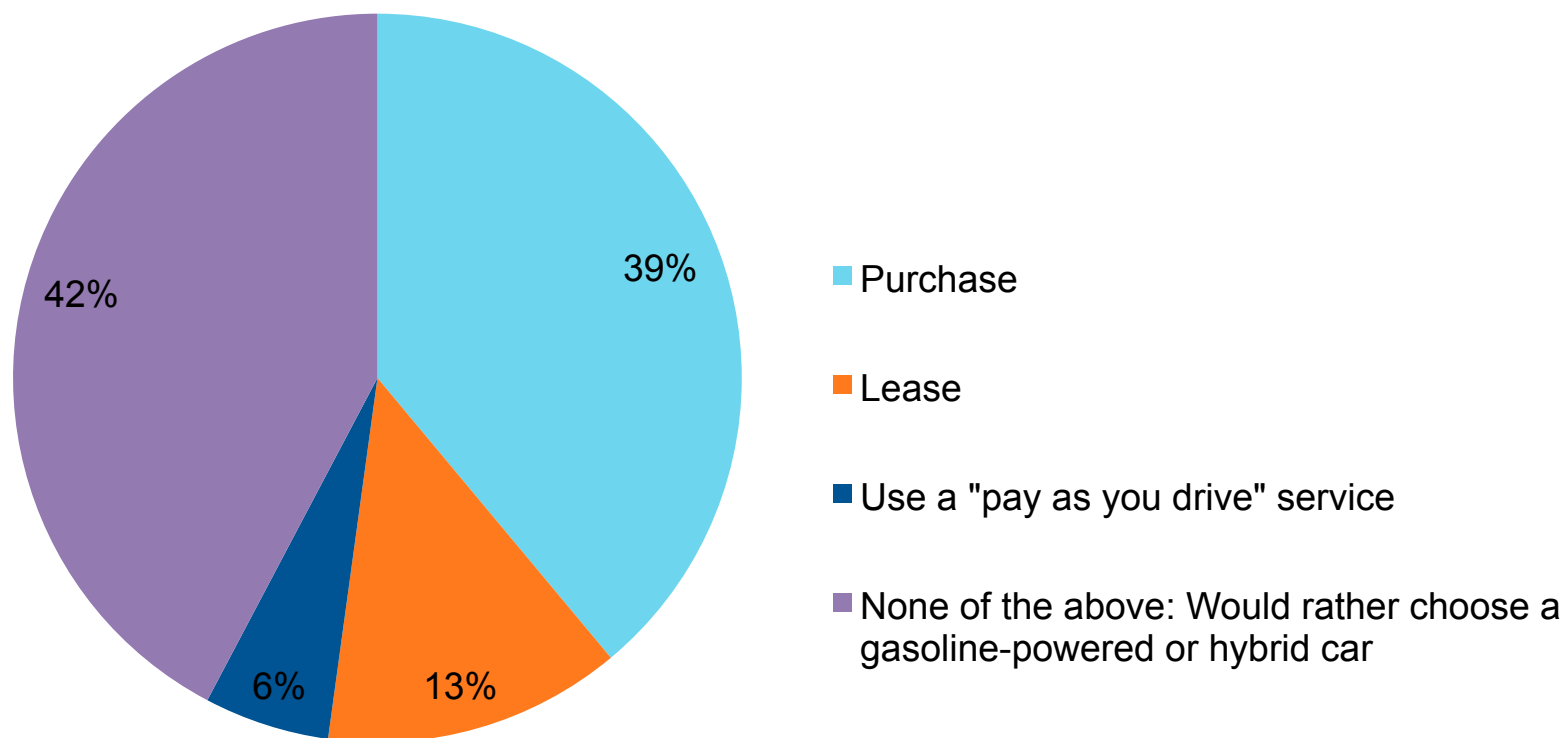
## Intent to Purchase

Purchase intent in this survey seems high, but this may reflect a very optimistic outlook or a compensation for recent industry slowdown

- 51% of the total respondents (1761 people) plan to buy or lease a car in the next 2 years
- 53% of those planning to buy a vehicle (899 people) prefer to buy, not lease

# Would you purchase or lease a full electric (not hybrid) vehicle?

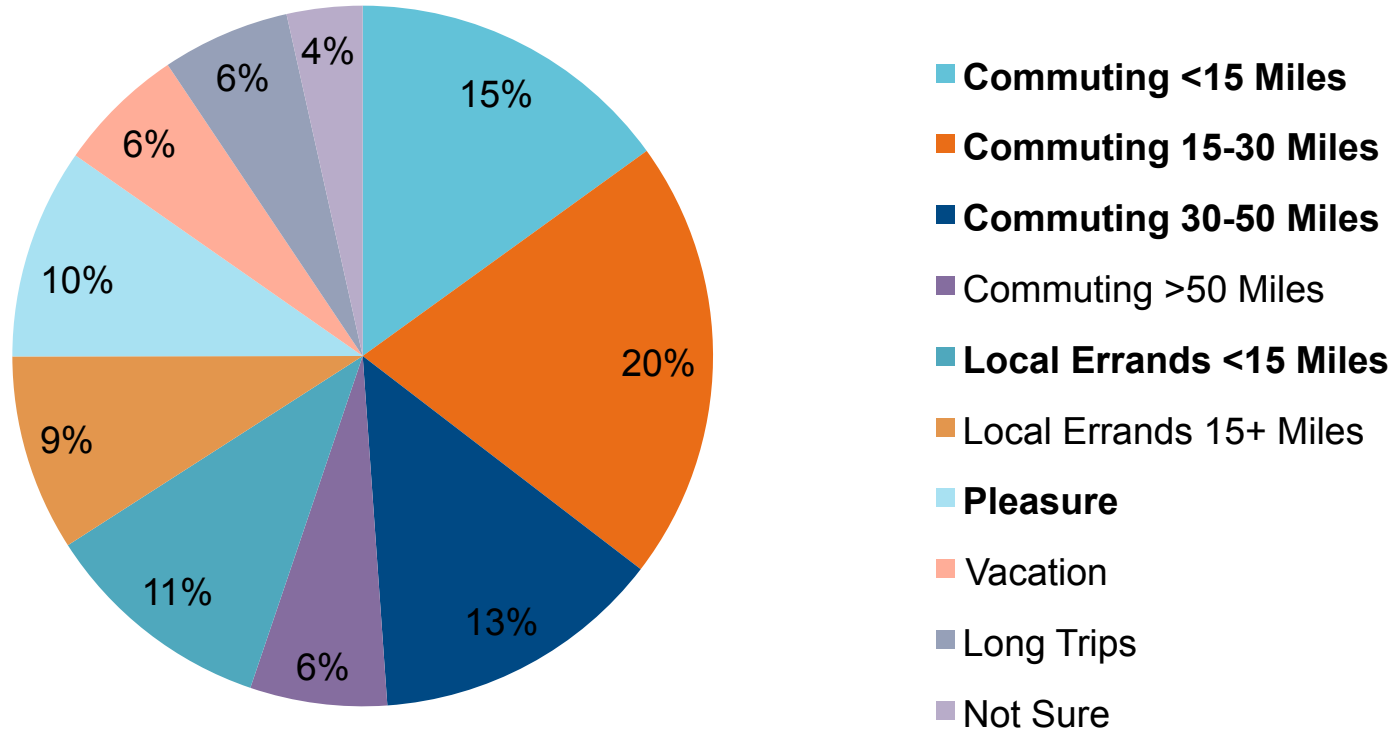
- Many consumers prefer gasoline or hybrid, but nearly 60% consider electric
- Ownership dominates over alternatives
- More awareness of “pay as you drive” services could increase popularity



**899 respondents**

# If you purchased an electric vehicle, what would you use it for?

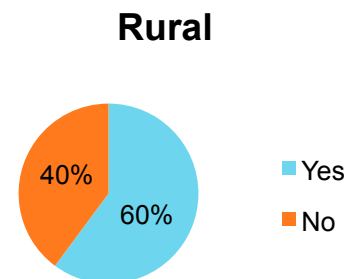
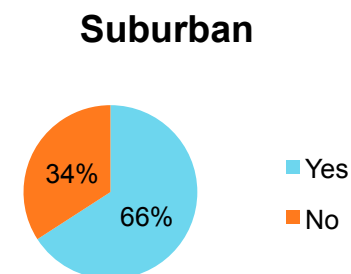
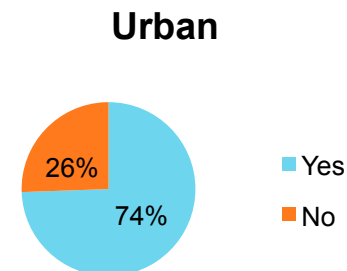
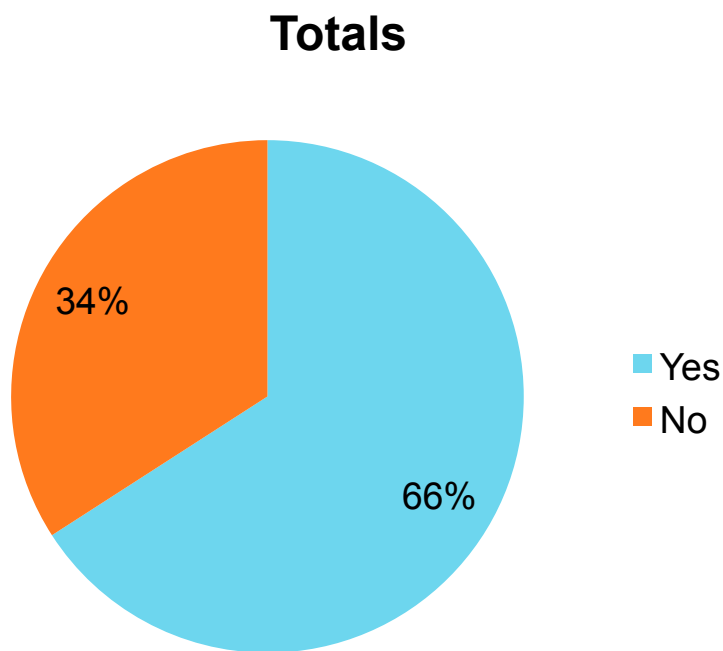
- Varied answers show consumers find EVs suitable for many purposes
- Mid-range commuting, local errands, and pleasure driving dominate



**519 respondents**

# Would an electric vehicle be your primary household vehicle?

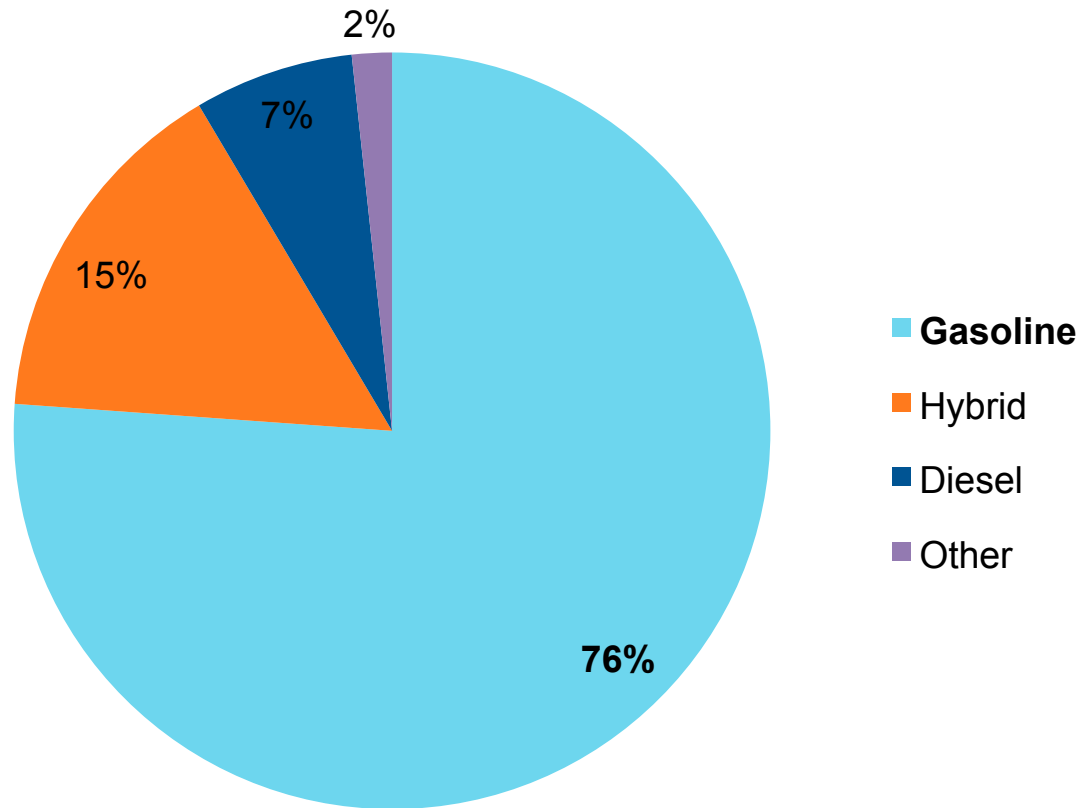
- Electric vehicles are not perceived as secondary vehicles, especially for urban residents
- Rural residents less likely to see EV as primary



**519 respondents**

# If not electric, what type of vehicle would be your primary household vehicle?

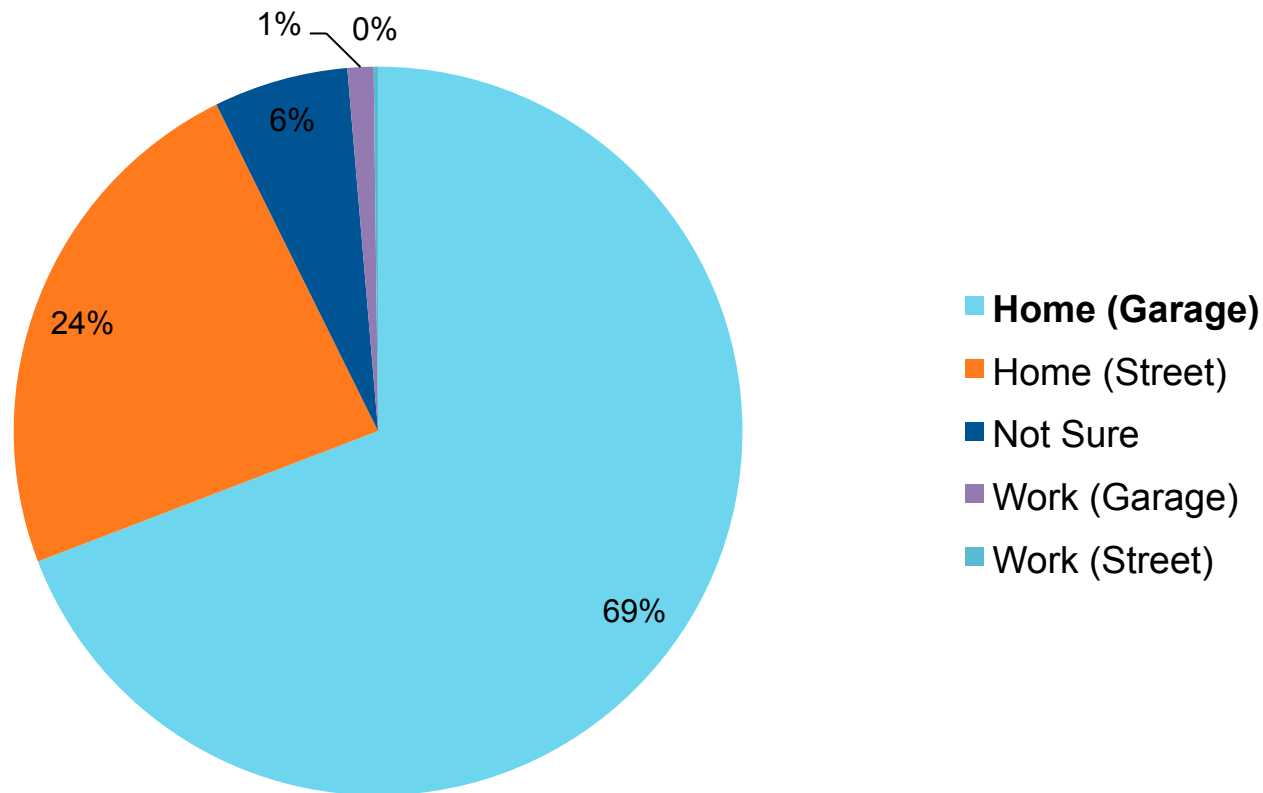
- Consumers remain rather attached to gasoline vehicles
- Some openness to hybrids and diesel



**176 respondents**

# Where would you typically park your electric vehicle?

- More than 90% of respondents plan to park at home

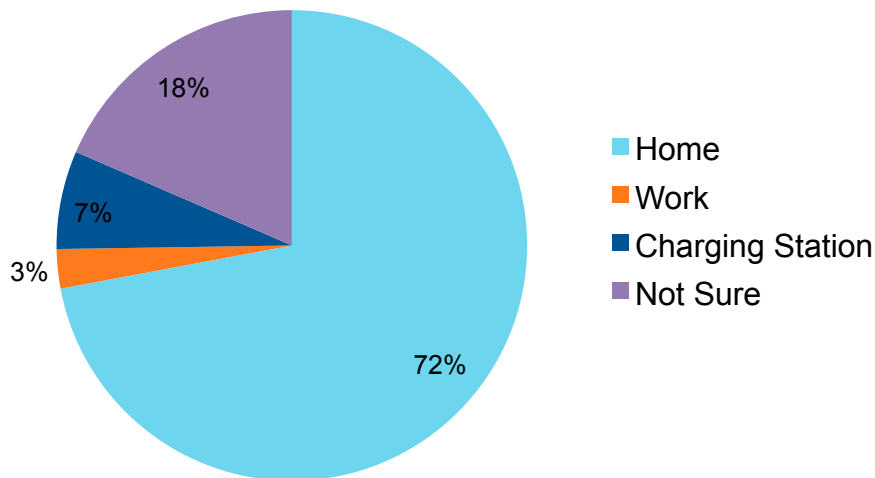


**519 respondents**

# Where would you plan to charge an electric vehicle?

- As with parking, most would charge at home, especially in rural areas
- Urban and suburban drivers slightly less certain about charging location

**Totals**



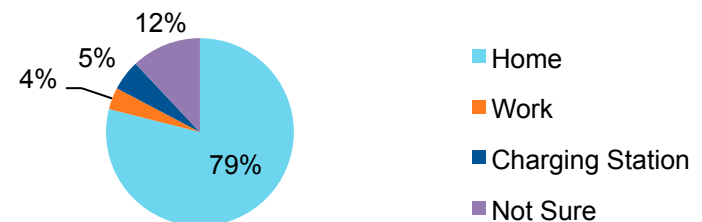
**Urban**



**Suburban**



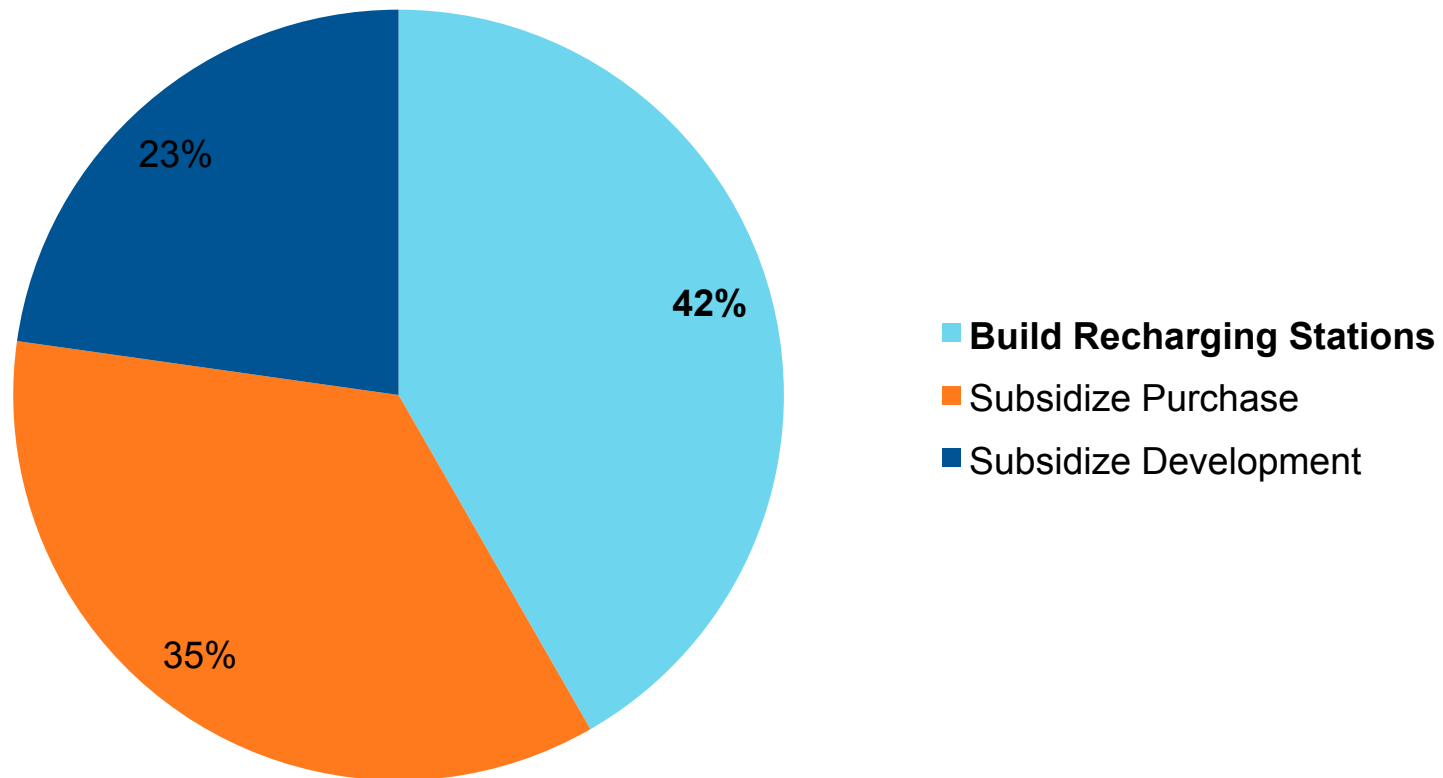
**Rural**



**519 respondents**

# How can the government help promote electric vehicles?

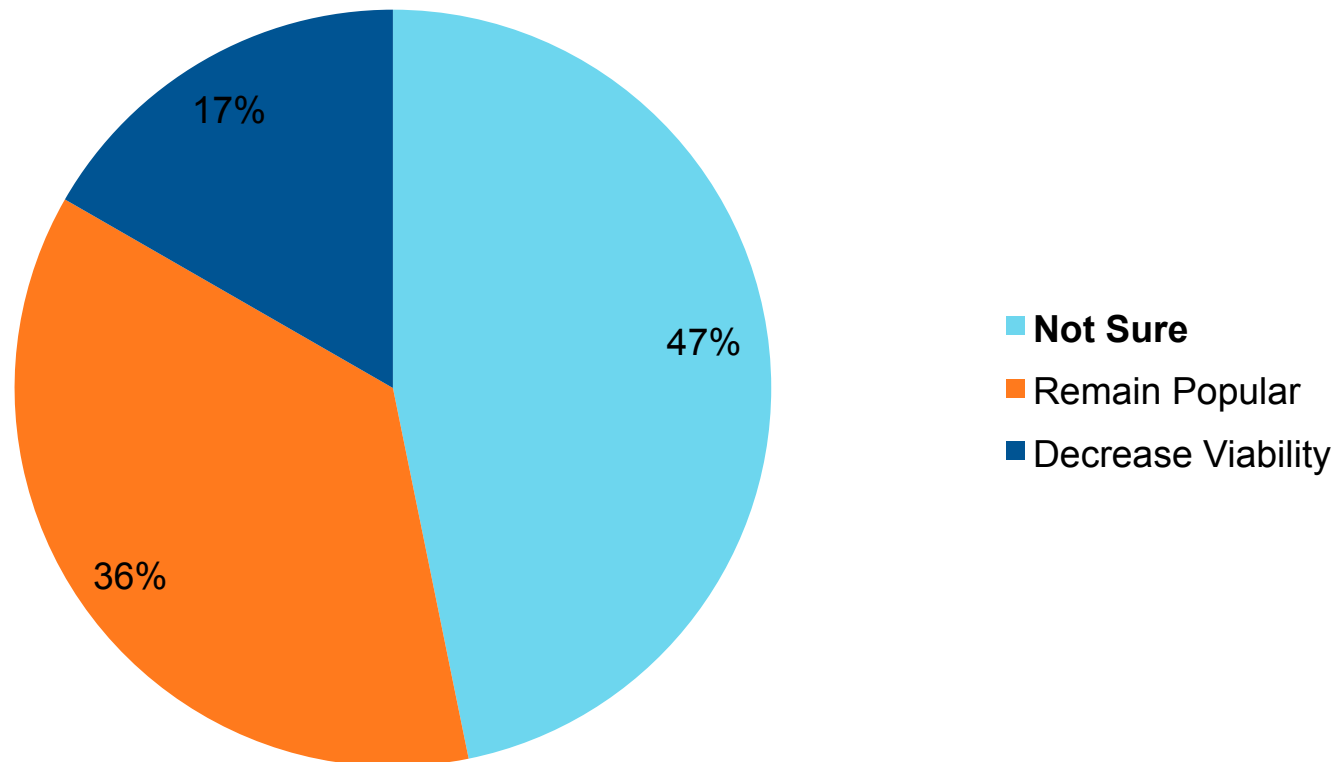
- Opinion is divided, with slight preference for recharging station construction



**1761 respondents**

## How will concerns about nuclear power affect electric vehicles as an alternative to gas-powered vehicles?

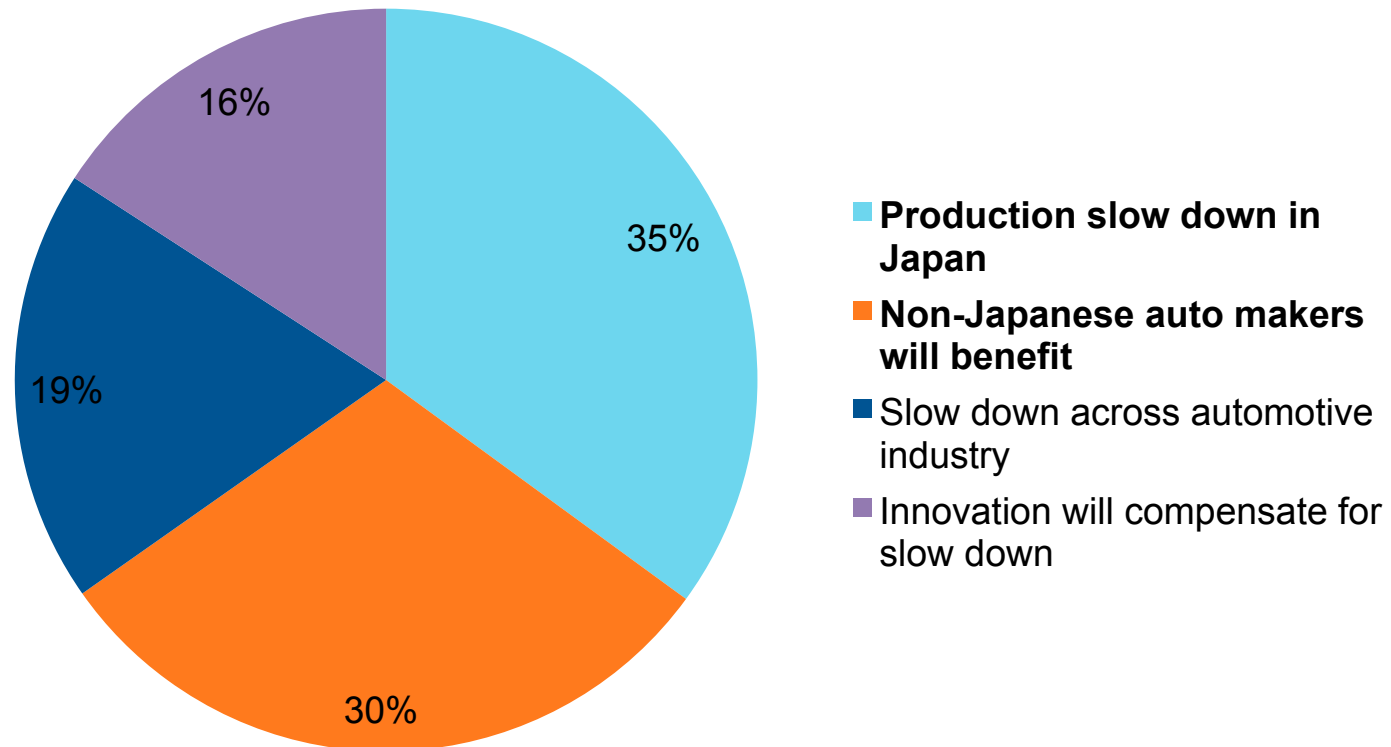
- Uncertainty dominates, but most consumers not extremely worried about power nuclear concerns affecting EVs



**1761 respondents**

## How do you think the recent earthquake in Japan will affect electric vehicle production over time?

- Respondents anticipate that the Japan production decline may give non-Japanese companies an advantage



**1761 respondents**

# Conclusions



# Key Findings on Electric Vehicles

- 51% of respondents intend to purchase or lease a new vehicle within 2 years—a surprisingly high proportion
- Electric vehicles (EVs) are a popular option among consumers, with about 60% considering purchasing one
- Mid-range commuting and errands, ranging from 0 to 50 miles, would be top EV uses
  - Data in line with other surveys related to commuting
- EVs would be the primary vehicle for most respondents considering an EV purchase (66%)

# Key Findings on Electric Vehicles

- The vast majority of respondents would keep and charge EVs at home
  - This raises a question about the urgent need for people to receive more documented information (home recharging stations being less appropriate for urban citizens).
- Opinion is divided regarding ways for government to encourage EVs, indicating an immature market
  - 42% of respondents would like to see government subsidies to help build recharging stations
  - 35% would prefer government to help subsidize purchase
- A month after the Japan earthquake, consumers are not very concerned about the nuclear power plant disaster having a negative impact on electricity production and EV viability

# Key Findings on Mobile Panel Surveys

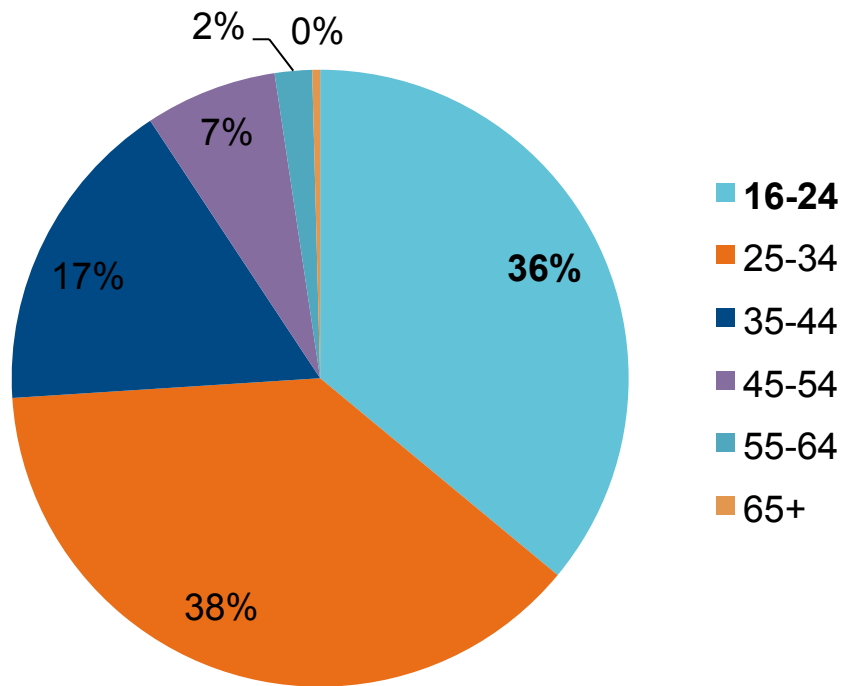
- Mobile surveys produce rich, qualitative data for analysis
- Full demographic data available for all survey responses
  - Survey sample not necessarily representative of the overall population
- Fast way to get feedback: 2000 responses in 12 hours
- Different kinds of questions (single-select, multi-select, open text fields) were tested and they all elicit detailed responses
- Comments provide deeper insight into consumer opinion
- Enprecis will continue to run monthly Mobility Panels for targeted market research and client initiatives

# Appendix: Respondent Demographics

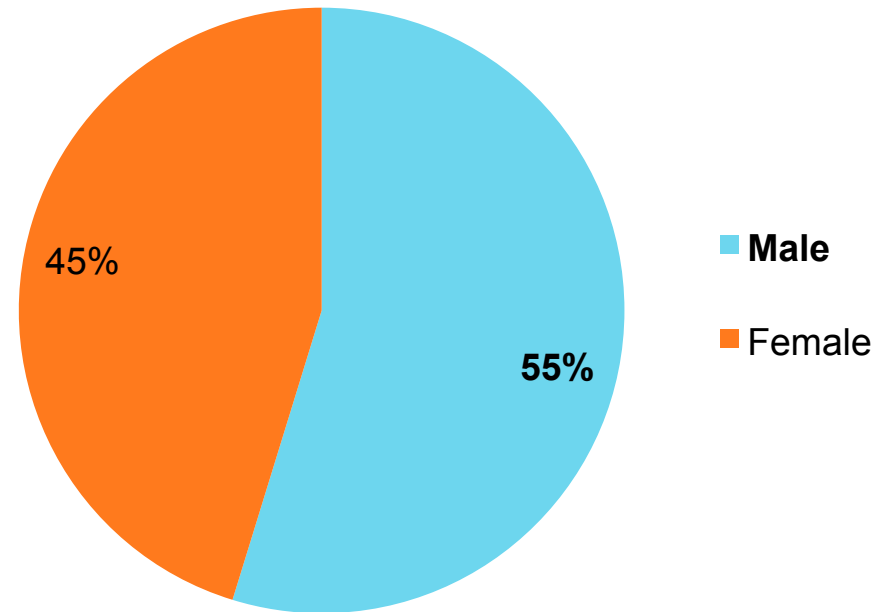


# Respondent Age and Gender

### Age



### Gender

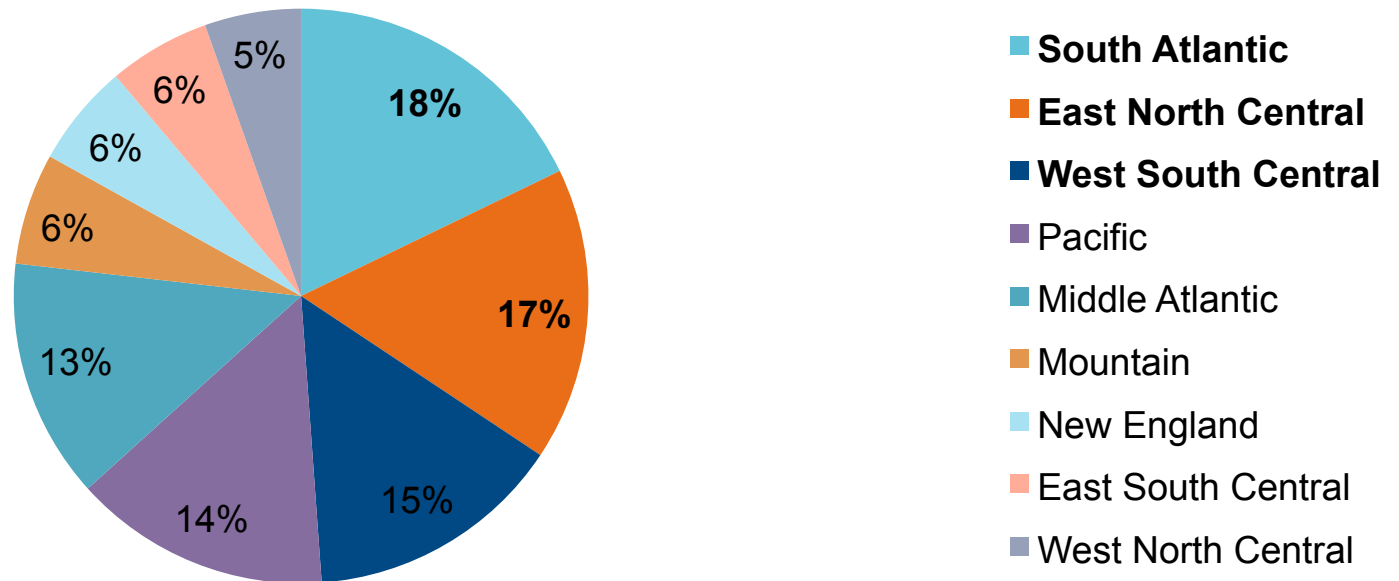


**1691 respondents with data**

**1629 respondents with data**



# Respondent Region

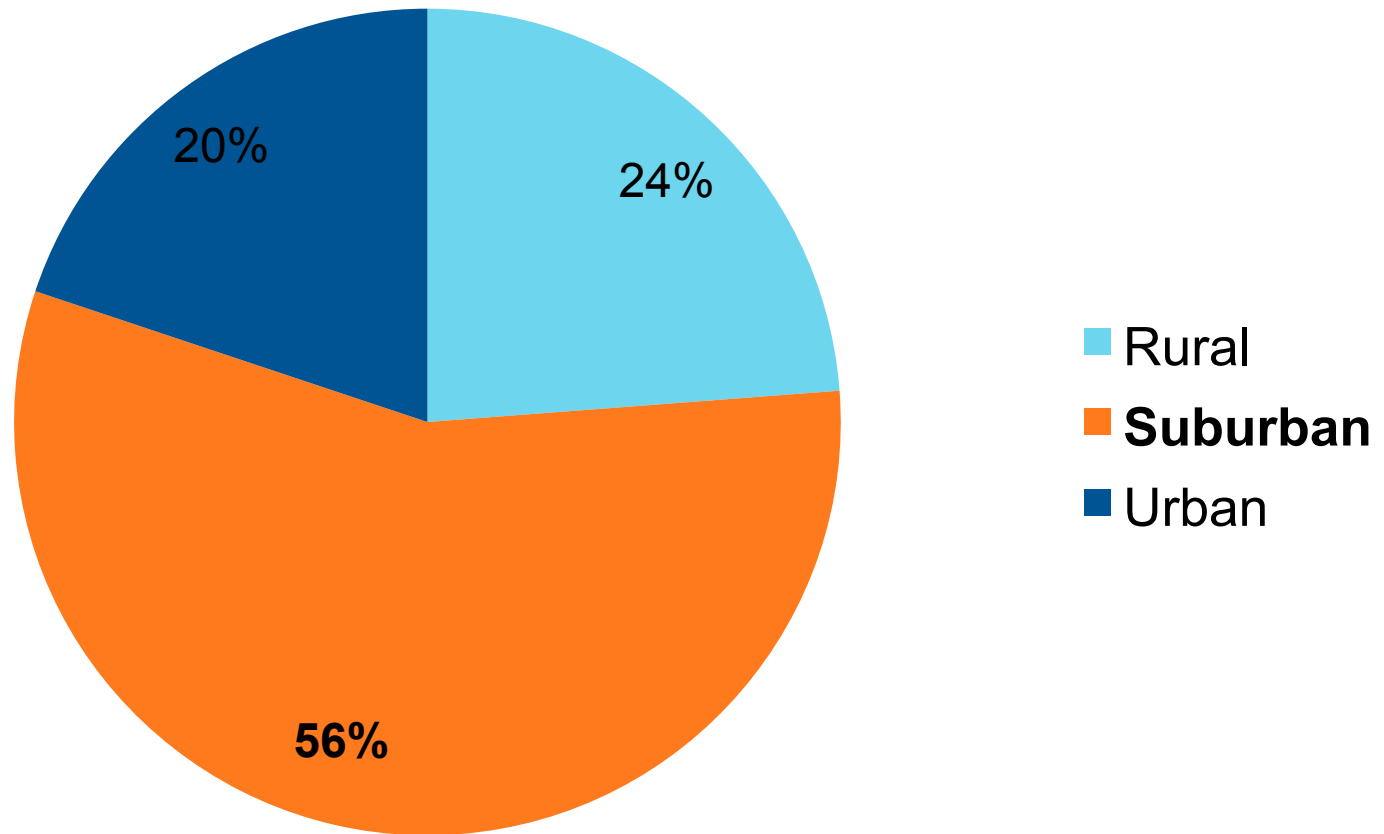


Pacific: AK, CA, HI, OR, WA  
Central: IL, IN, MI, OH, WI  
Middle Atlantic: NJ, NY, PA  
Mountain: AZ, CO, ID, MT, NV, NM, UT, WY  
East South Central: AL, KY, MI, TN

South Atlantic: DE, DC, FL, GA, MD, NC, SC, VA, WV  
East North Central: AR, LA, OK, TX  
West South Central: AR, LA, OK, TX  
West North Central: IA, KS, MN, MO, NE, ND, SD  
New England: CT, ME, MA, NH, RI, VT

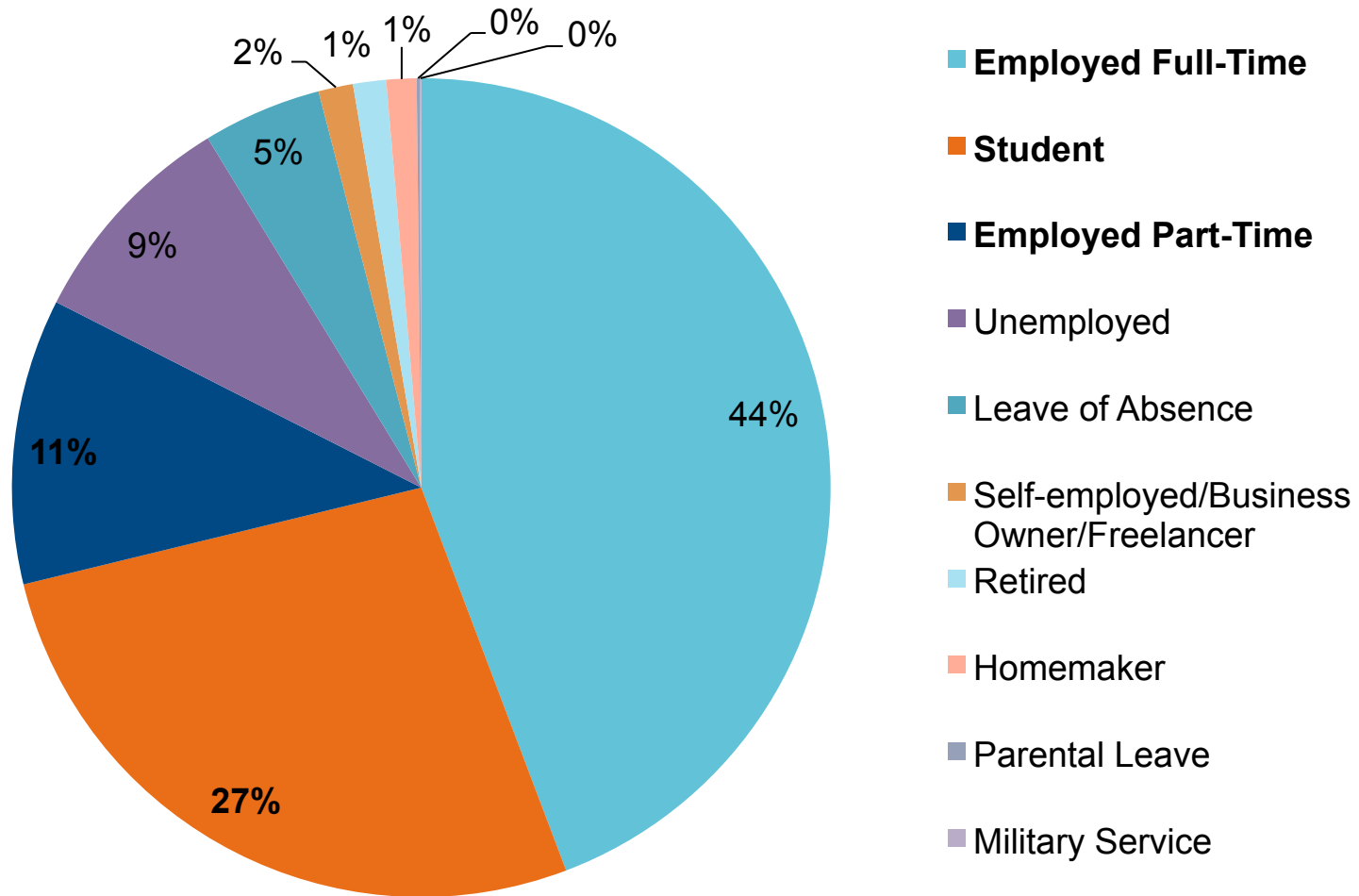
**1660 respondents with data**

# What type of area do you live in?



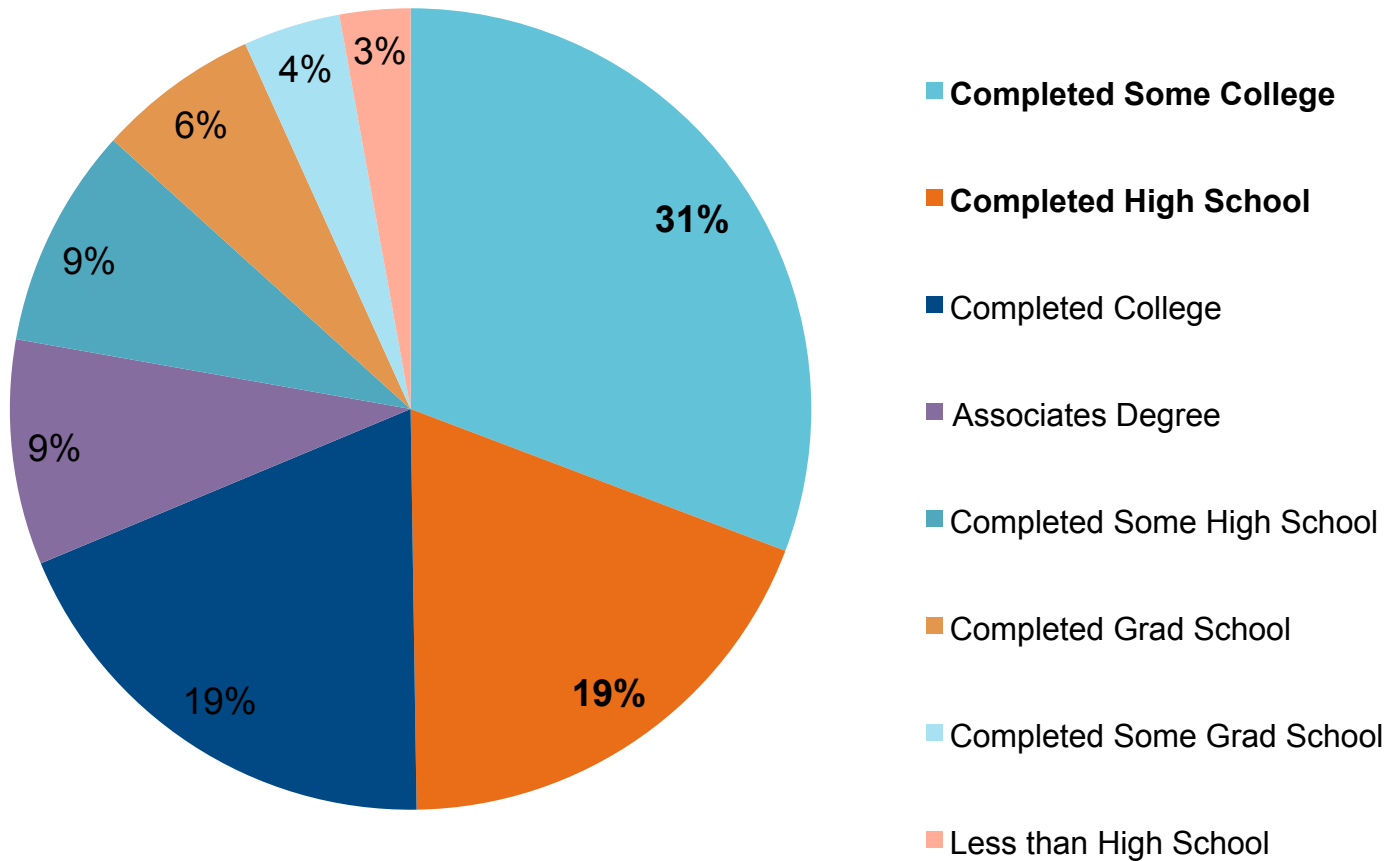
**1761 respondents**

# Respondent Employment



**1708 respondents**

# Respondent Education



**1684 respondents**