

# ELECTRIC VEHICLES – WHAT DO DRIVERS REALLY THINK?

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**AA**



# WHO WE POLLED

- ▶ AA Populus Driver Poll – panel of c.150k AA members
- ▶ 13 -20 June 2018, 10,293 respondents
- ▶ Age 18 to 65+
- ▶ All England regions + Scotland, Wales & Northern Ireland



LOCATION	PERCENTAGE
City Centre	3%
City Suburb	20%
Town Centre	5%
Town Outskirts	40%
Village	28%
Hamlet	5%

# WHAT I THINK

STATEMENT	AGREE	STRONGLY AGREE
Can't go far enough on a single charge	76%	53%
Too expensive	76%	51%
Take too long to charge	67%	38%
Not enough charging points	85%	63%
Not enough choice of models	67%	37%



BUT...

STATEMENT	AGREE
I would like to have an EV	31%



## WHAT'S MY PROBLEM ?

*To what extent would you say that each of the following factors/issues would act as a barrier to you purchasing an EV? (% concerned)*

	JAN 2016	JUL 2017	JUN 2018
High purchase price	82%	83%	83%
Availability of public charging point	81%	84%	80%
Lack of rapid charge on motorways	—	—	79%
Time to offset higher purchase price vs lower running costs	68%	66%	69%
Concerns re: battery durability	65%	69%	68%

**To what extent would you say that each of the following factors/issues would act as a barrier to you purchasing an EV? (% concerned)**

	<b>JAN 2016</b>	<b>JUL 2017</b>	<b>JUN 2018</b>
Time takes to charge	55%	60%	59%
Limited range for day-to-day needs	59%	61%	59%
Uncertainty over service and repair infrastructure	58%	59%	57%
Uncertainty over home/public charging process	52%	56%	55%
Lack of choice	50%	49%	54%

# WHEN I'LL BUY

TIMESCALE	CURRENT INDICATION	DETAIL
Already have one	1%	-
Within 2 years	1%	3% age 25-34 2% men
Between 2-5 years	8%	9% age 18-24 10% age 25-34 14% city centre 11% London
Between 5-10 years	25%	26% women 24% men 28% age 35-44 28% city centre/suburb
By 2040	26%	34% age 18-24 34% age 25-34 29% city centre
By 2050	10%	-
Never	28%	30% men 37% North East 31% Yorkshire and the Humber



# WHAT I WANT

WHAT IT WOULD TAKE FOR ME TO SWITCH TO A FULL EV	OVERALL	DETAIL
Real world range of at least 250 miles on a single charge	55%	58% men 49% women 50% age 18-24 57% age 47-54 59% North East, South East and Scotland 49% London
EVs cost the same or less to buy as a conventional combustion vehicle	44%	44% age 18-24 50% age 25-34



A lot more public charging points	35%	34% men 39% women 38% age 18-24 26% age 25-44
A network of rapid chargers at motorway services	30%	32% men 26% women 23% age 18-24 32% 25-44 34% city & town centre
Financial penalties for driving petrol/diesel become too large	22%	-
Petrol/diesel becomes too expensive	20%	-
More choice of EVs to buy	19%	-





## WHO WILL PAY ?

It is expected significant funding needed for charging infrastructure

*What is the fairest way to fund it?*

Tax payable by all EV owners	39%
Tax Payable by all road users	19%
Don't know	18%
General taxation	17%
Other	6%
Increase energy bills	1%

# WILL WE STILL WANT CARS ?

Growth in ride-hailing, sharing, autonomous cars might mean less demand for private cars.

*When would you choose not to own a car?*

	ALL	LONDON
Within 5 years	3%	5%
Between 5 -10 years	9%	13%
Between 10-20 years	20%	24%
Never, always own car	45%	37%

# WHAT DO WE DO NOW?

## ▶ Better education

- Range, charging speed and infrastructure all getting better
- Driver perception's not changing fast enough
- Sales staff could do better

## ▶ Women & Children (young adults) first

- Target/tailor messages to those less concerned about barriers and more likely to be earlier adopters
- 93% of women buying a car with their partner are involved in the research

## ▶ Build it and they will come

- Getting the product right is the key
- Price, range, style and charging points much more important than bus lane access or penalties on petrol/diesel



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