BESPOKE SURVEYS

Autos and Electric Vehicles

1250+ US Consumers Balanced to Census

January 2022

CHECK BREAKDOWN:

TREND CHECKS

EVs – Sentiment Favorable/Consistent Sequentially

❑ Based on consumer feedback, EVs are projected to gain share over the next upgrade cycle. IE – a higher percentage of those who plan to purchase a vehicle in the future plan to get electric (~30%) compared to the percentage of current auto owners who say they own electric (~5-10%).

❑ Consumer attitudes toward autonomous features and toward electric vehicles have been relatively consistent sequentially over the past year. Younger respondents are more likely than older respondents to prefer EVs.

❑ Consumers are still not sold on the safety of autonomous vehicles. If anything, they have been increasingly likely to believe humans driving themselves is safer.

Rivian and Lucid Awareness Increases, Tesla Brand Driving Interest

❑ Familiarity with Rivian and Lucid has improved q/q, with Rivian familiarity increasing more than Lucid.

❑ Consumer sentiment toward the appearance/look of Rivian, Lucid, and Firsker was consistent q/q. Similar to last quarter, consumers do not offer a favorable opinion of the Cybertruck's appearance from Tesla.

❑ Tesla is the brand respondents would be most likely to choose if price was no object. Over the past year, those with interest in getting a Tesla have been increasingly likely to say they want one because they like the brand and/or look/status of the car.

Auto Purchasing Trends

❑ Auto purchasing intentions ran hotter during the pandemic. Purchase intentions aren't yet at pre-pandemic levels, but they have cooled a bit sequentially.

❑ Over the past year, intentions have shifted a bit in favor of new over used.

❑ In 2020 and 2021, higher end / luxury brands trended higher when it comes to which brand those considering a new car in the next 6 months would be most likely to choose (at the expense of non-luxury). That trend has shown signs of starting to reverse over just the last couple of months.

ELECTRIC AND AUTONOMOUS VEHICLES – CONSUMER FEEDBACK

Electric and Autonomous Vehicles | Domestic

WHEN IS THE LAST TIME YOU PURCHASED OR LEASED A CAR/AUTOMOBILE?

Posed to all respondents

I don't own/lease a car/automobile
- 18.2%
- 16.4%
- 15.5%
- 18.4%
- 15.5%

More than three years ago
- 36.8%
- 35.6%
- 36.4%
- 35.0%
- 39.0%

In the past three years
- 24.8%
- 24.2%
- 23.3%
- 21.5%
- 24.1%

In the past year
- 14.7%
- 17.6%
- 18.1%
- 17.1%
- 14.1%

In the past three months
- 5.5%
- 6.3%
- 6.7%
- 8.0%
- 7.3%

Legend: Jan (22), Oct (21), Jul (21), Apr (21), Jan (21)
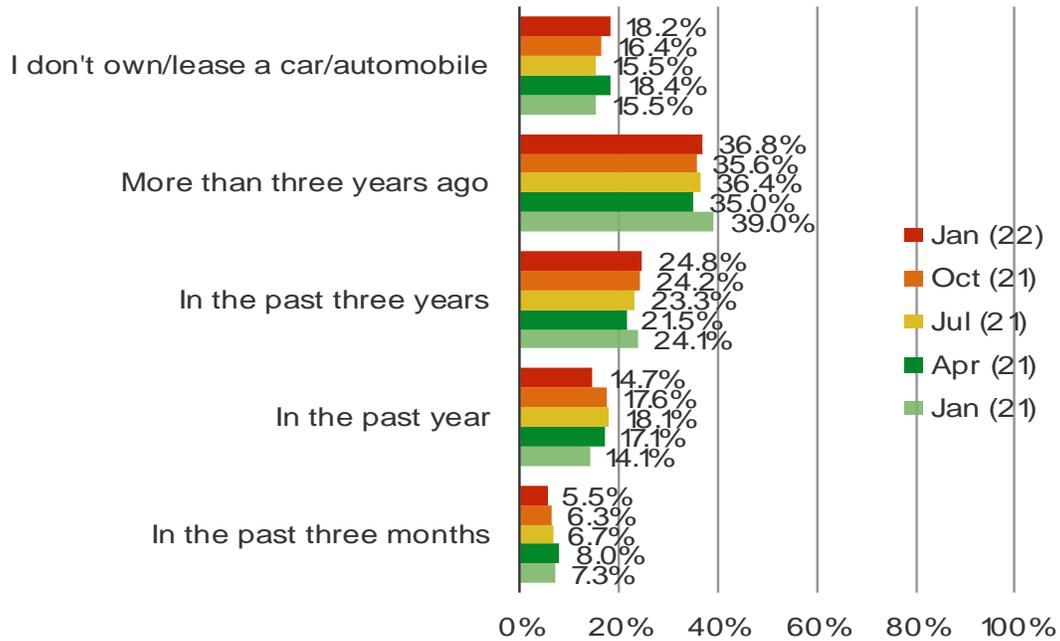
WHEN ARE YOU MOST LIKELY TO PURCHASE OR LEASE A VEHICLE NEXT?

Posed to all respondents

Category	Jan (22)	Oct (21)
I have no plans to purchase or lease a vehicle in the future	28.3%	25.2%
More than three years from now	23.3%	26.0%
In the next three years	12.8%	14.9%
In the next two years	15.4%	15.1%
In the next year	12.4%	12.0%
In the next three months	4.2%	2.8%
I am in the market now	3.6%	4.1%
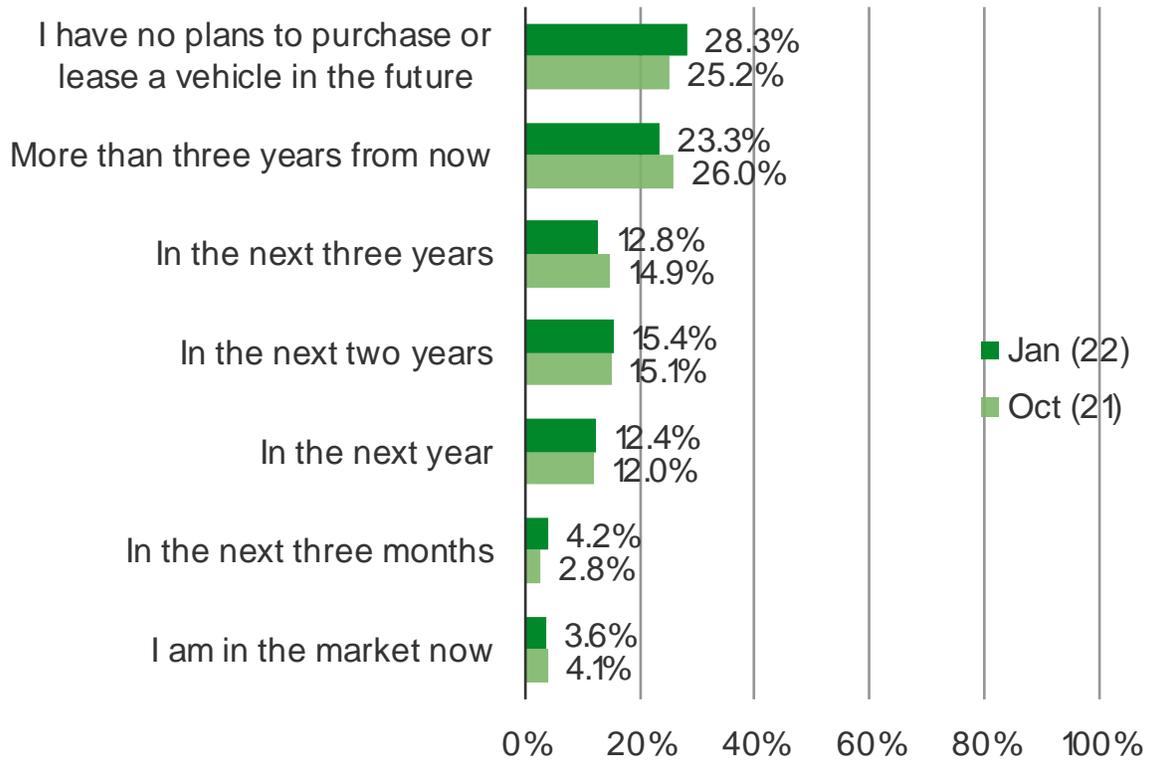
THINKING ABOUT THE NEXT VEHICLE YOU WILL PURCHASE OR LEASE, IS IT MORE LIKELY TO BE:

Posed to all respondents who have plans to purchase or lease a vehicle.

Gas
- Jan (22): 69.7%
- Oct (21): 68.9%

Electric
- Jan (22): 30.4%
- Oct (21): 31.1%

Legend:
- Jan (22)
- Oct (21)
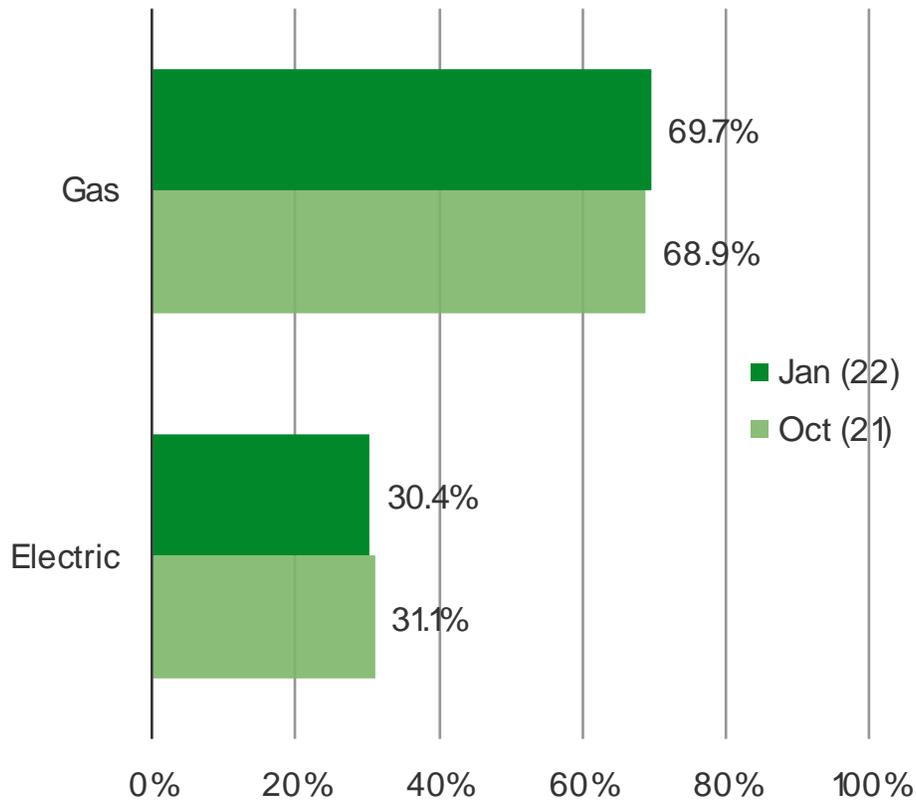
Note – for comparison, 5-10% of auto owners say they own an EV now.

WHICH OF THE FOLLOWING DO YOU CURRENTLY OWN IN YOUR HOUSEHOLD? (SELECT ALL THAT APPLY)

Posed to all respondents

Sedan/car — 52.8% Jan (22), 53.2% Oct (21)
SUV — 42.7% Jan (22), 41.1% Oct (21)
Pickup Truck — 22.1% Jan (22), 21.4% Oct (21)
Crossover — 9.1% Jan (22), 8.9% Oct (21)
Other — 8.6% Jan (22), 8.8% Oct (21)
Minivan — 6.7% Jan (22), 7.5% Oct (21)

Legend:
- Jan (22)
- Oct (21)
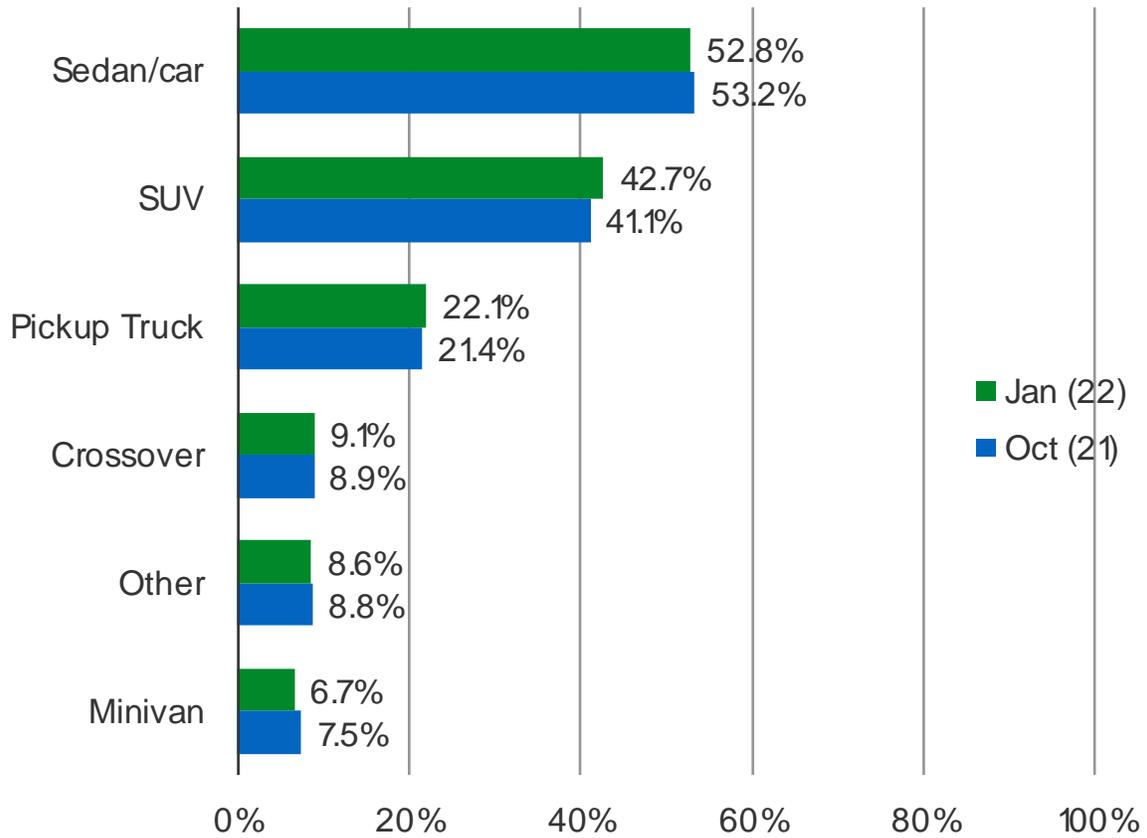
WHICH IS YOUR MOST PREFERRED TYPE OF VEHICLE TO OWN/LEASE?

Posed to all respondents

Vehicle Type	Jan (22)	Oct (21)
Sedan/car	35.9%	36.6%
SUV	34.7%	36.2%
Pickup Truck	13.9%	13.5%
Crossover	7.2%	6.6%
Minivan	4.3%	3.2%
Other	4.0%	3.9%

Electric and Autonomous Vehicles | Domestic
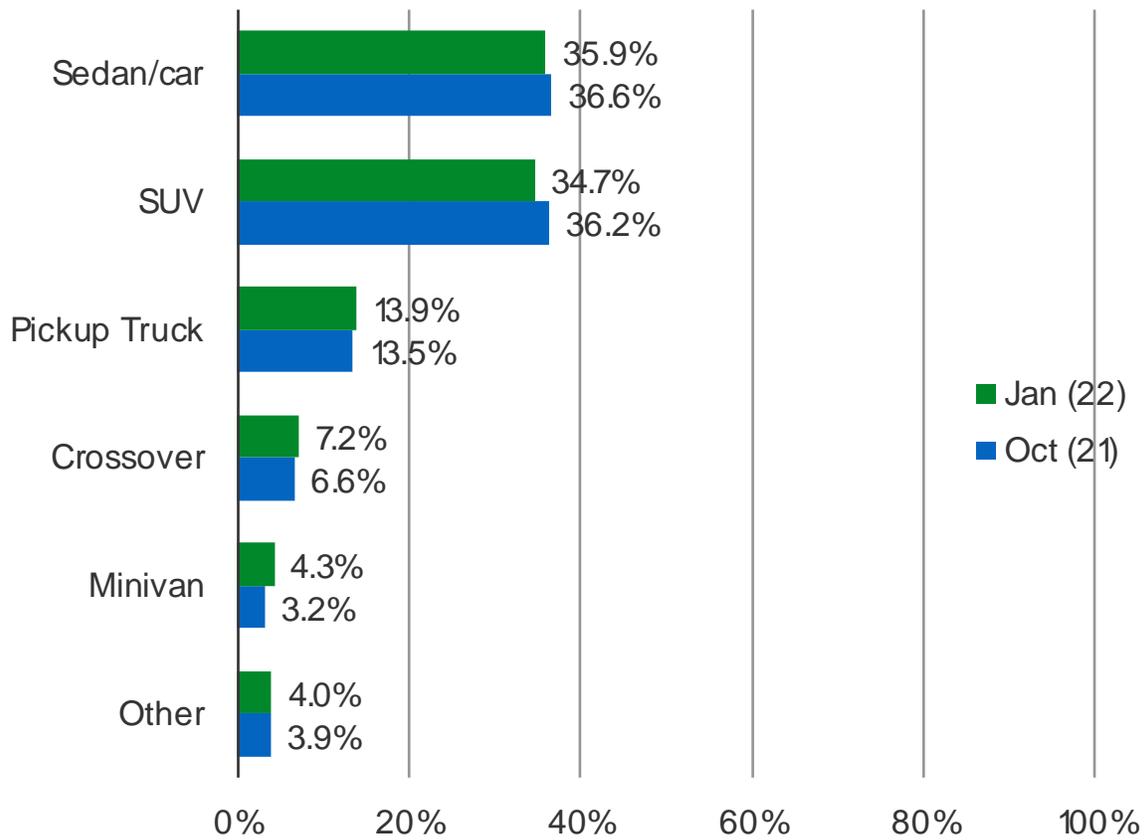
DO YOU CURRENTLY OWN/LEASE ONE OR MORE AUTOS THAT HAVE THE FOLLOWING FEATURES?

Posed to respondents who own/lease a car.

None of the above / no self-driving features
- 67.4%
- 67.3%
- 67.7%
- 70.3%
- 72.4%

Adaptive Cruise Control
- 27.2%
- 26.2%
- 25.5%
- 22.9%
- 23.6%

Lane-Centering Steering
- 18.8%
- 16.8%
- 17.7%
- 16.6%
- 16.7%

Hands-Free Steering
- 6.3%
- 5.6%
- 7.0%
- 6.5%
- 5.0%

Other Self-Driving Features Not Listed Above
- 4.8%
- 5.6%
- 5.9%
- 6.4%
- 6.0%

Legend:
- Jan (22)
- Oct (21)
- Jul (21)
- Apr (21)
- Jan (21)

X-axis: 0%, 20%, 40%, 60%, 80%, 100%

Electric and Autonomous Vehicles | Domestic
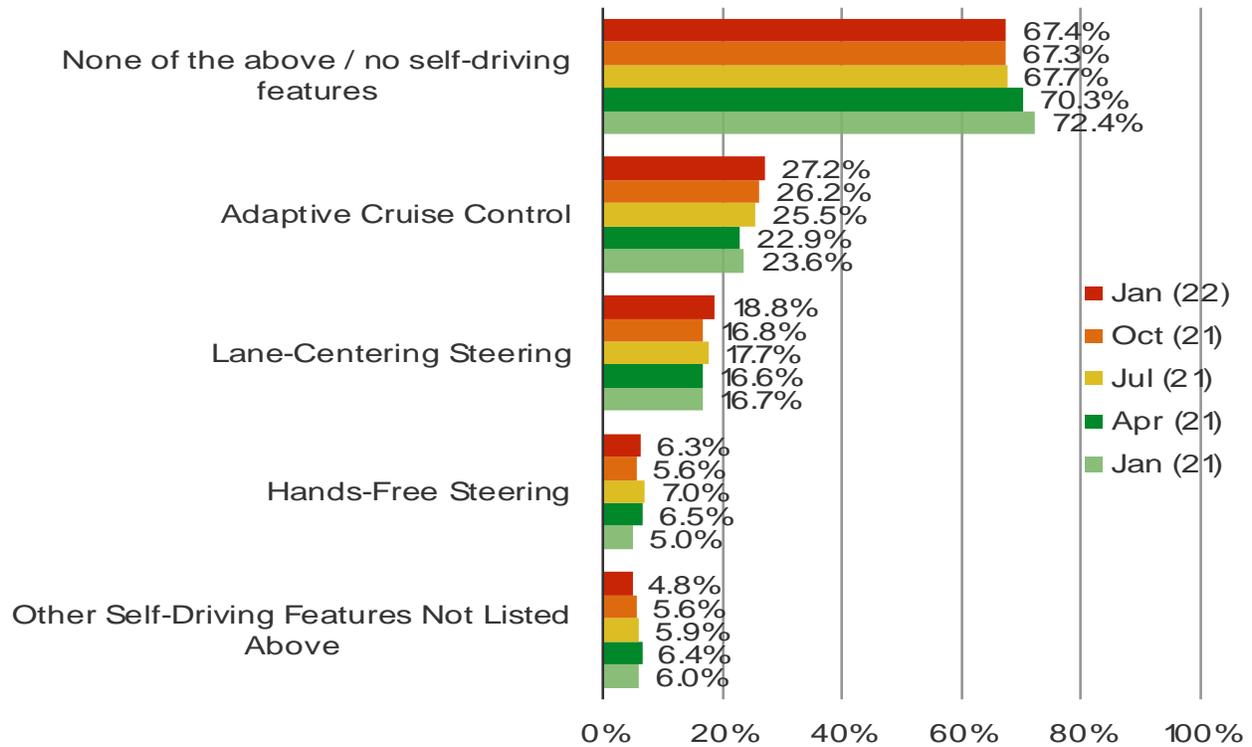
IN YOUR OPINION, HOW AUTONOMOUS WOULD THE IDEAL CAR/AUTO BE?

Posed to respondents who own/lease a car.

Period	Score
Jan (22)	4.84
Oct (21)	5.02
Jul (21)	4.89
Apr (21)	4.79
Jan (21)	5.01

Scale: 1 - Not Autonomous At All → 10 - Fully Self-Driving/Autonomous

Data Cross-Tabbed By Age

Legend: 1 - Not Autonomous At All, 2, 3, 4, 5, 6, 7, 8, 9, 10 - Fully Self-Driving / Autonomous

Age	1	2	3	4	5	6	7	8	9	10
75 or older	31.3%	3.1%	0.0%	6.3%	31.3%	6.3%	3.1%	9.4%	6.3%	3.1%
65 to 74	20.7%	2.4%	4.8%	3.2%	36.5%	4.0%	4.0%	3.2%	3.2%	8.9%
55 to 64	21.0%	8.5%	6.3%	4.6%	33.0%	3.4%	5.1%	3.4%	2.8%	11.9%
45 to 54	29.0%	4.6%	6.6%	3.3%	36.2%	1.3%	2.6%	6.6%	2.0%	7.9%
35 to 44	19.9%	5.7%	0.7%	5.7%	29.8%	6.4%	7.8%	8.5%	2.1%	13.5%
25 to 34	12.6%	6.7%	4.4%	4.4%	31.9%	4.4%	3.0%	8.9%	5.9%	17.8%
18 to 24	14.3%	7.1%	5.4%	3.6%	32.1%	7.1%	5.4%	10.7%	5.4%	8.9%

BESPOKE MARKET INTELLIGENCE

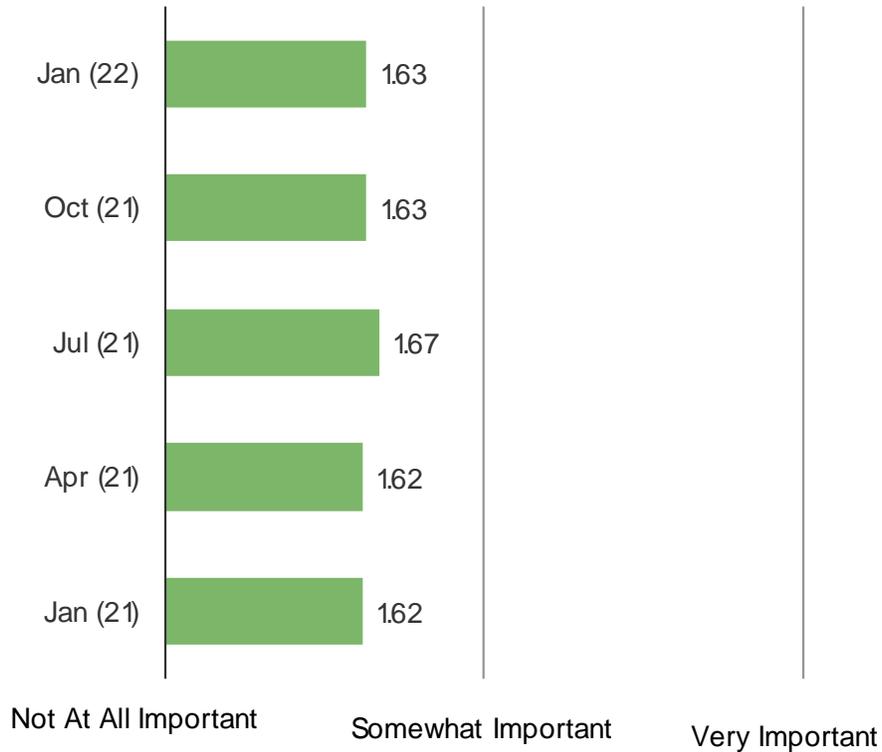Electric and Autonomous Vehicles | Domestic

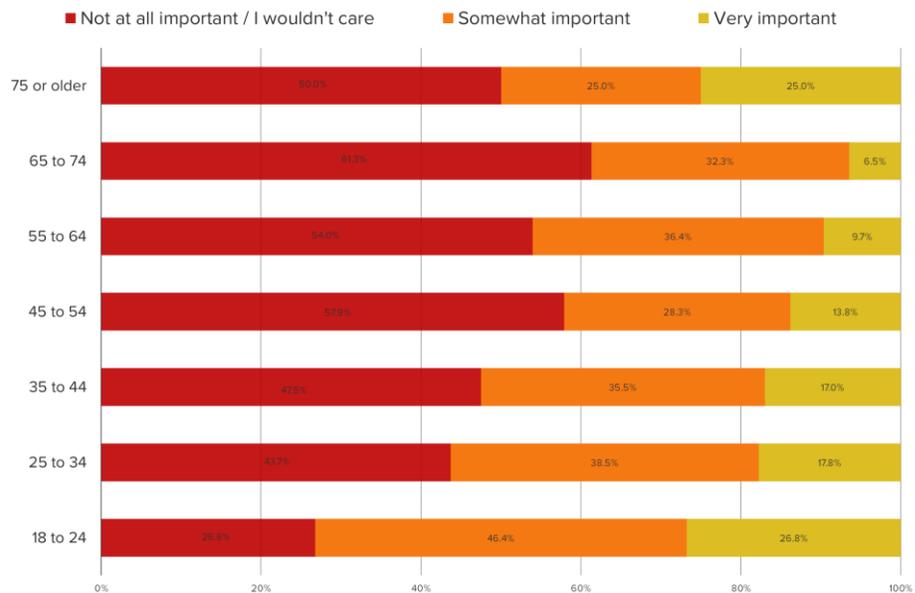Audience: 1,000 US Consumers
Date: January 2022

IF YOU WERE LOOKING TO GET A NEW CAR, HOW IMPORTANT WOULD IT BE FOR THE CAR TO BE AVAILABLE IN ELECTRIC?
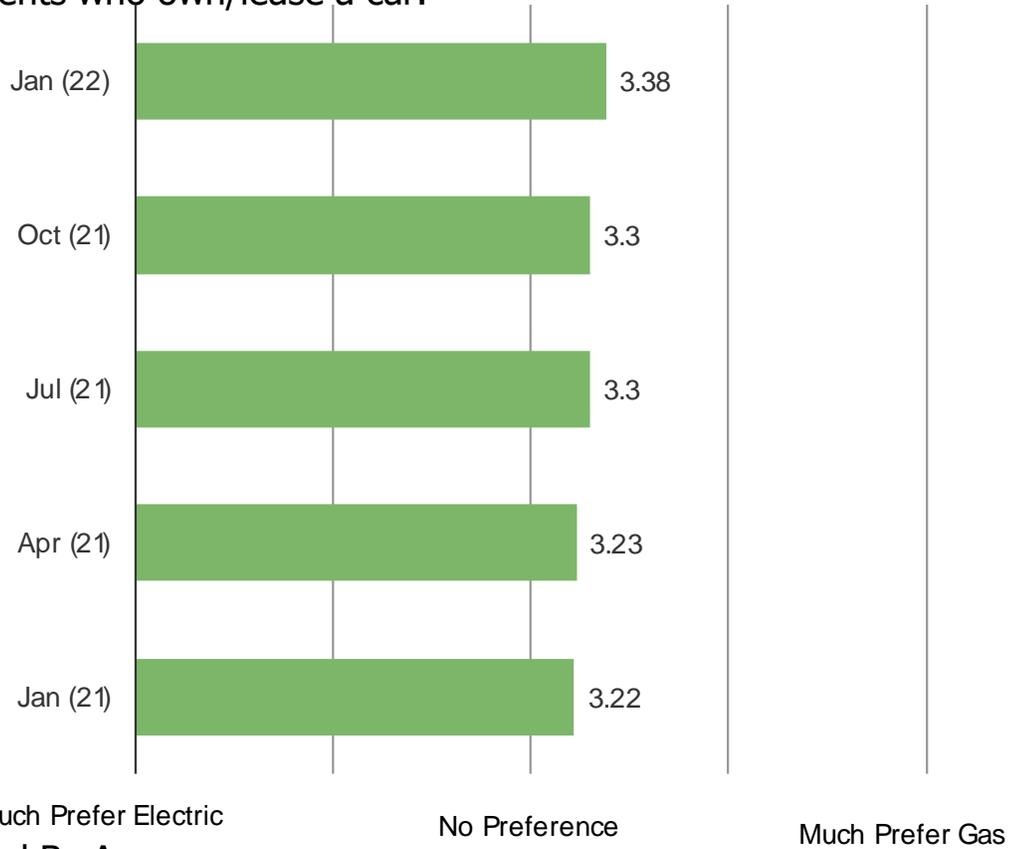
Posed to respondents who own/lease a car.

Jan (22)	1.63
Oct (21)	1.63
Jul (21)	1.67
Apr (21)	1.62
Jan (21)	1.62

Not At All Important   Somewhat Important   Very Important

Data Cross-Tabbed By Age

■ Not at all important / I wouldn't care   ■ Somewhat important   ■ Very important

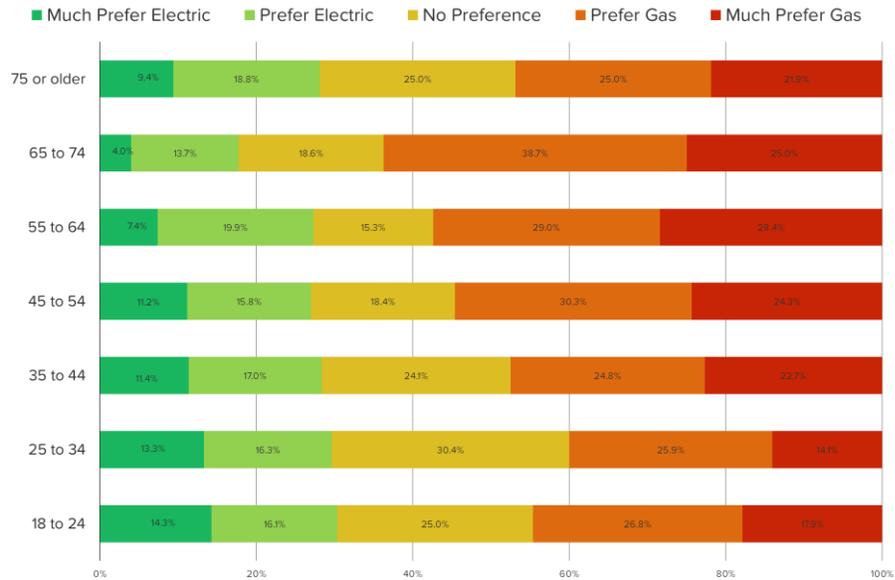|	Not at all important / I wouldn't care	Somewhat important	Very important
75 or older	50.0%	25.0%	25.0%
65 to 74	61.3%	32.3%	6.5%
55 to 64	54.0%	36.4%	9.7%
45 to 54	57.9%	28.3%	13.8%
35 to 44	47.5%	35.5%	17.0%
25 to 34	43.7%	38.5%	17.8%
18 to 24	26.8%	46.4%	26.8%

IF YOU WERE LOOKING TO GET A NEW CAR/AUTOMOBILE, WHICH WOULD YOU PREFER TO GET?

Posed to respondents who own/lease a car.

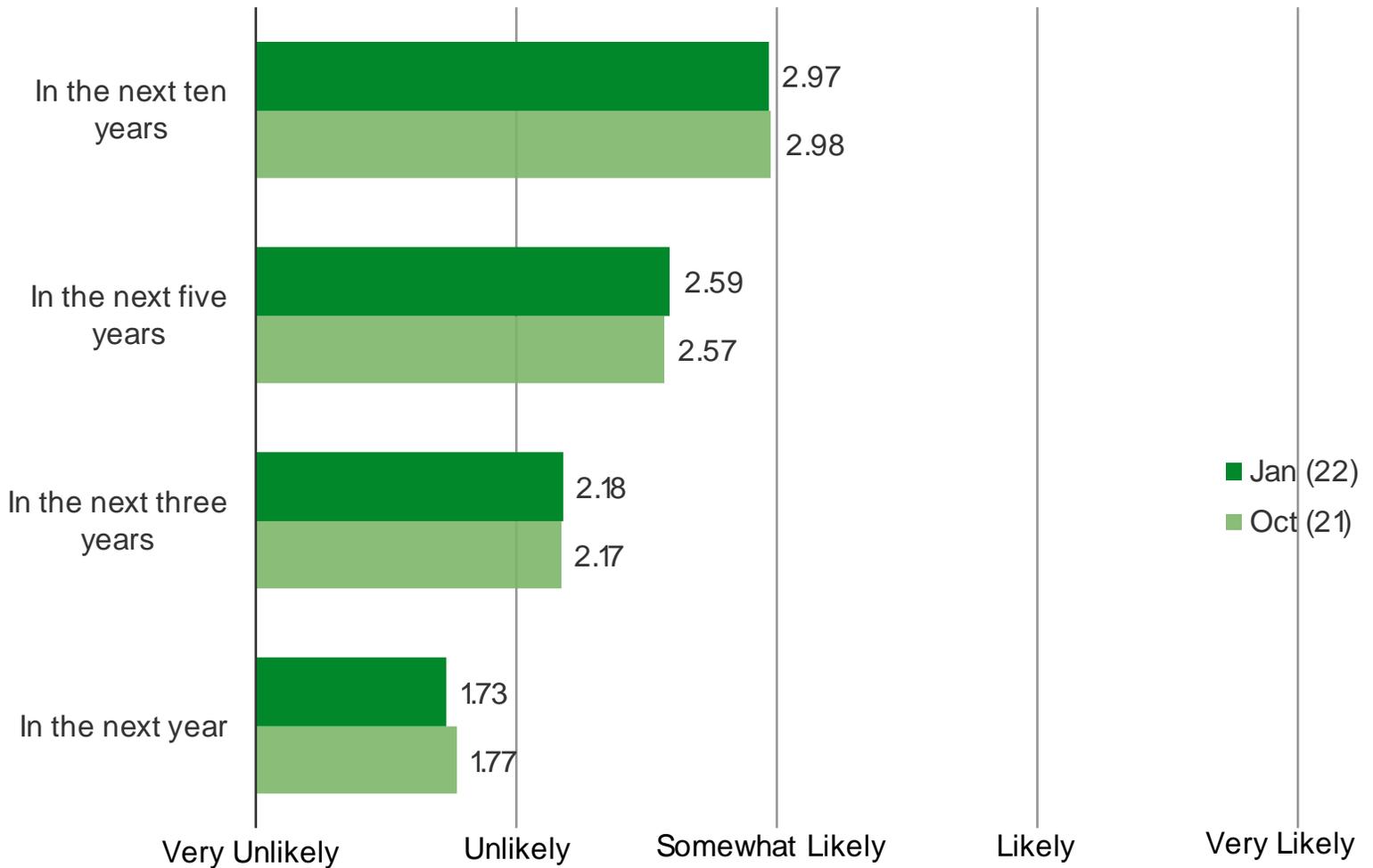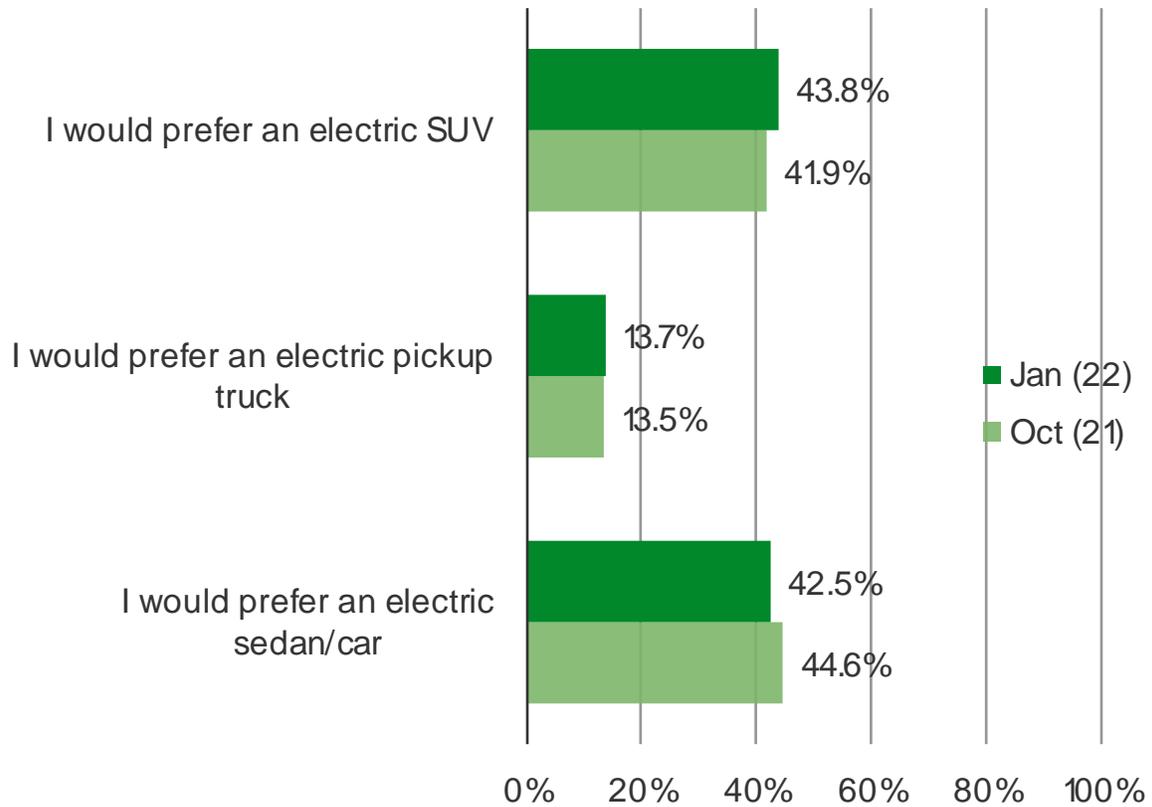| Period	Score
Jan (22)	3.38
Oct (21)	3.3
Jul (21)	3.3
Apr (21)	3.23
Jan (21)	3.22

Much Prefer Electric — No Preference — Much Prefer Gas

Data Cross-Tabbed By Age

Legend: ■ Much Prefer Electric ■ Prefer Electric ■ No Preference ■ Prefer Gas ■ Much Prefer Gas

Age	Much Prefer Electric	Prefer Electric	No Preference	Prefer Gas	Much Prefer Gas
75 or older	9.4%	18.8%	25.0%	25.0%	21.9%
65 to 74	4.0%	13.7%	18.6%	38.7%	25.0%
55 to 64	7.4%	19.9%	15.3%	29.0%	28.4%
45 to 54	11.2%	15.8%	18.4%	30.3%	24.3%
35 to 44	11.4%	17.0%	24.1%	24.8%	22.7%
25 to 34	13.3%	16.3%	30.4%	25.9%	14.1%
18 to 24	14.3%	16.1%	25.0%	26.8%	17.9%

HOW LIKELY ARE YOU OWN OR LEASE AN ELECTRIC VEHICLE...

Posed to respondents who own/lease a car.

Category	Jan (22)	Oct (21)
In the next ten years	2.97	2.98
In the next five years	2.59	2.57
In the next three years	2.18	2.17
In the next year	1.73	1.77

Scale: Very Unlikely — Unlikely — Somewhat Likely — Likely — Very Likely

IF YOU WERE TO PURCHASE OR LEASE AN ELECTRIC VEHICLE, WOULD YOU PREFER...

Posed to respondents who own/lease a car.

I would prefer an electric SUV
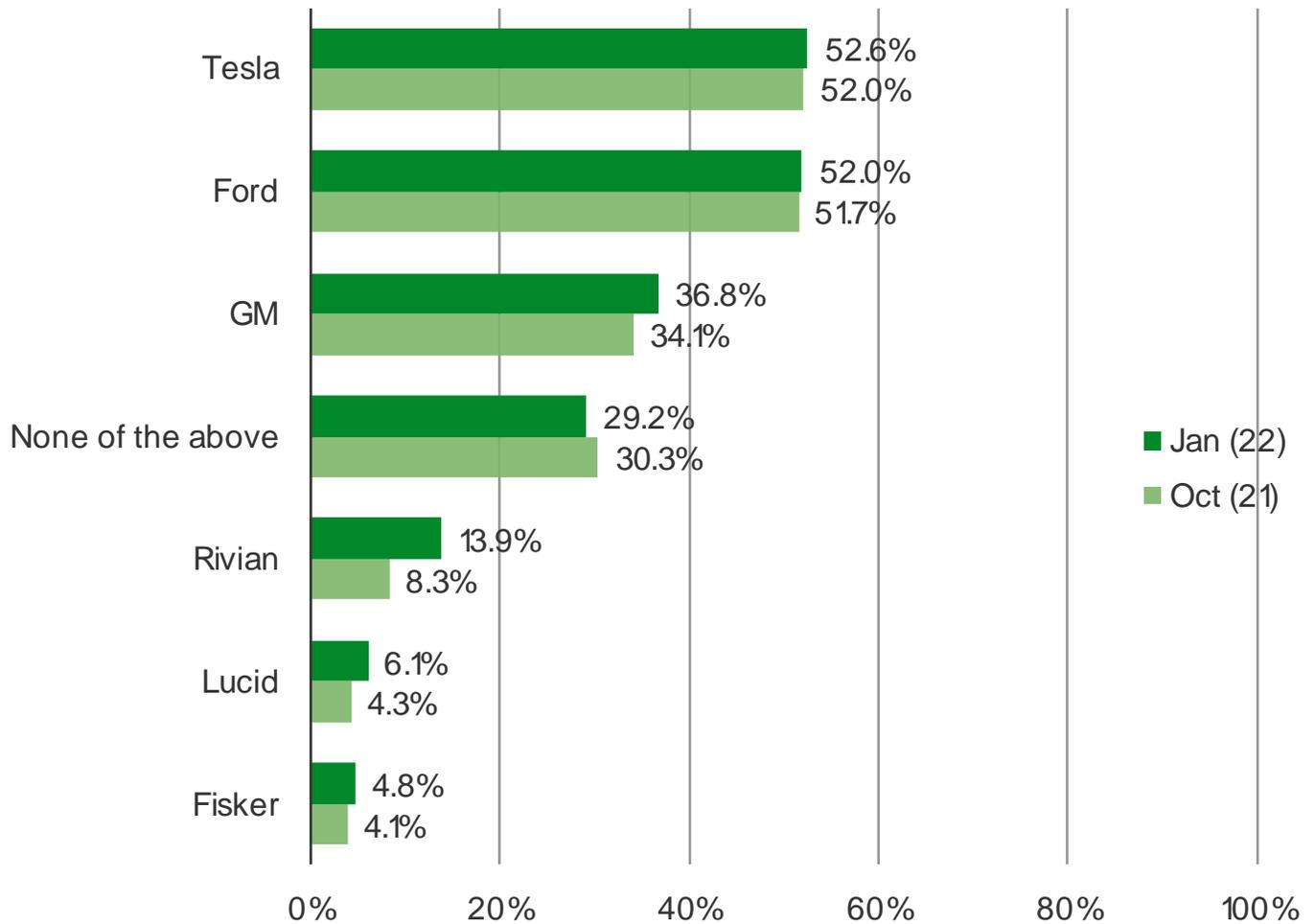- 43.8% — Jan (22)
- 41.9% — Oct (21)

I would prefer an electric pickup truck
- 13.7% — Jan (22)
- 13.5% — Oct (21)

I would prefer an electric sedan/car
- 42.5% — Jan (22)
- 44.6% — Oct (21)

Legend:
■ Jan (22)
■ Oct (21)

X-axis: 0% 20% 40% 60% 80% 100%

WHICH ELECTRIC TRUCK BRAND ARE YOU MOST FAMILIAR WITH?
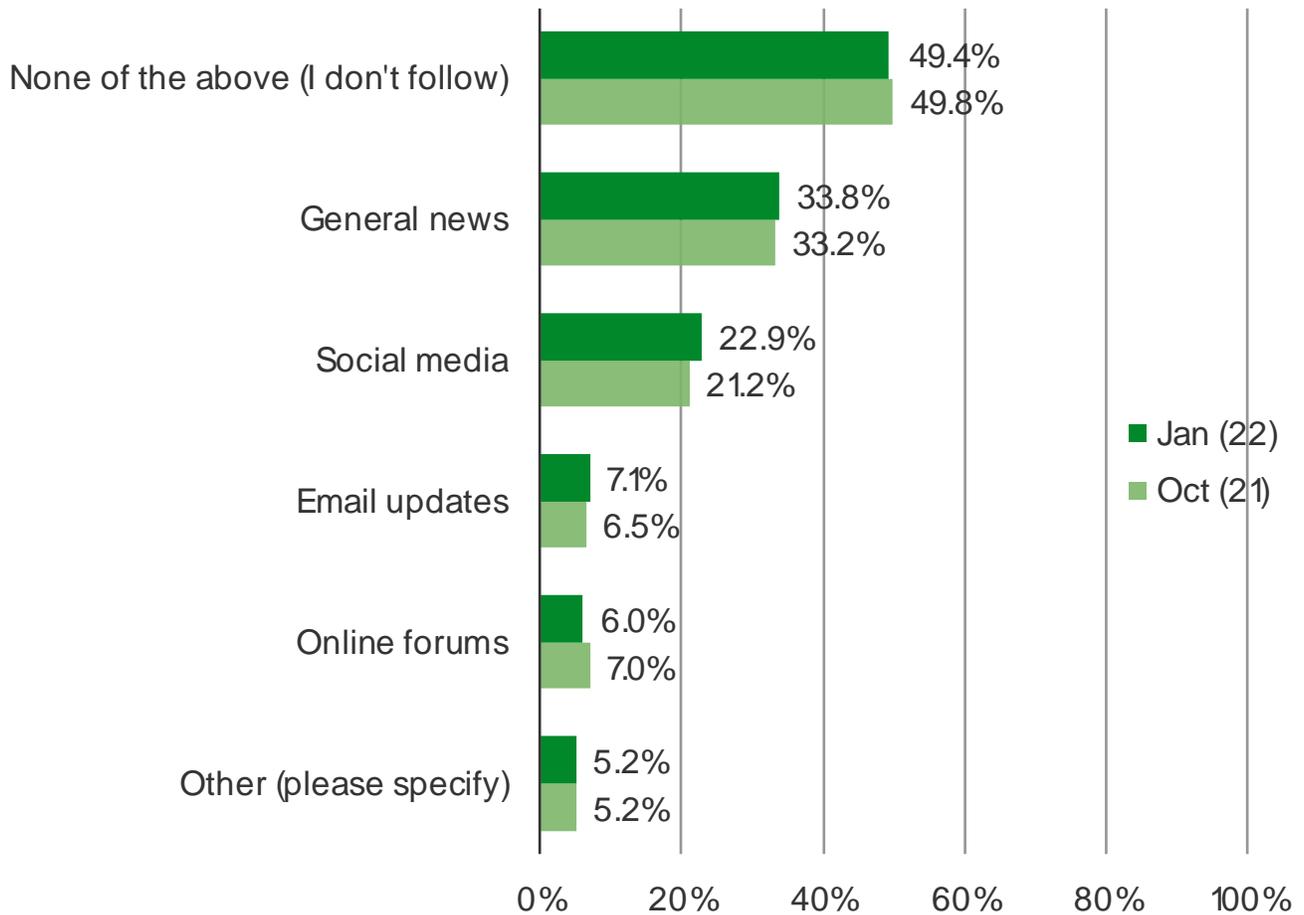
Posed to respondents who own/lease a car.

ARE YOU FAMILIAR WITH ANY OF THE FOLLOWING ELECTRIC TRUCK BRANDS? SELECT ALL THAT APPLY
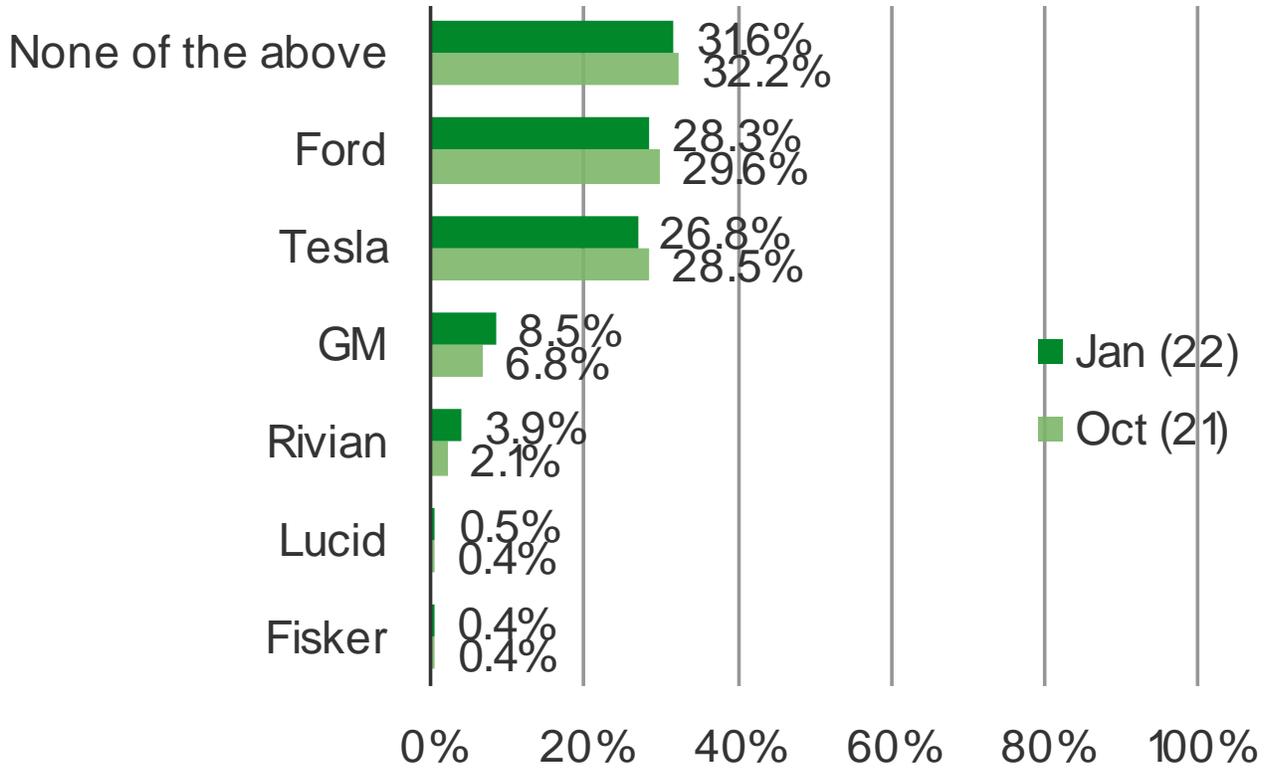
Posed to respondents who own/lease a car.

Tesla — Jan (22): 52.6%, Oct (21): 52.0%
Ford — Jan (22): 52.0%, Oct (21): 51.7%
GM — Jan (22): 36.8%, Oct (21): 34.1%
None of the above — Jan (22): 29.2%, Oct (21): 30.3%
Rivian — Jan (22): 13.9%, Oct (21): 8.3%
Lucid — Jan (22): 6.1%, Oct (21): 4.3%
Fisker — Jan (22): 4.8%, Oct (21): 4.1%

Legend: ■ Jan (22) ■ Oct (21)

HOW DO YOU KEEP TRACK OF NEW NEW PRODUCTS FROM ELECTRIC TRUCK BRANDS? SELECT ALL THAT APPLY
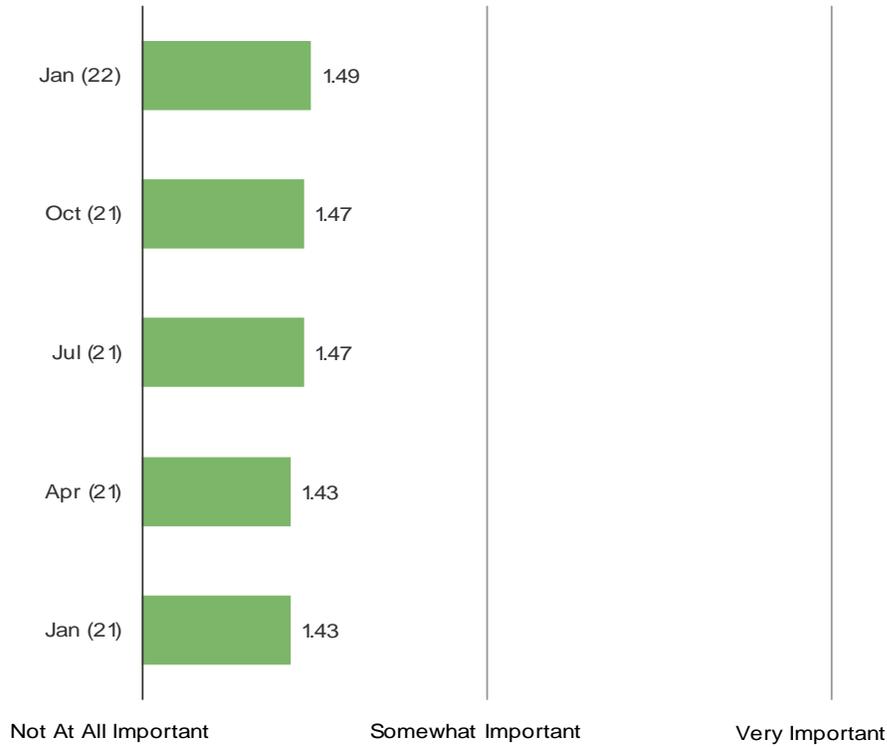
Posed to respondents who own/lease a car.

None of the above (I don't follow): Jan (22) 49.4%, Oct (21) 49.8%
General news: Jan (22) 33.8%, Oct (21) 33.2%
Social media: Jan (22) 22.9%, Oct (21) 21.2%
Email updates: Jan (22) 7.1%, Oct (21) 6.5%
Online forums: Jan (22) 6.0%, Oct (21) 7.0%
Other (please specify): Jan (22) 5.2%, Oct (21) 5.2%

Legend: ■ Jan (22) ■ Oct (21)

OF THESE ELECTRIC TRUCK BRANDS, WHICH ARE YOU MOST FAMILIAR WITH?

Posed to respondents who own/lease a car.

None of the above: 31.6% (Jan 22), 32.2% (Oct 21)
Ford: 28.3% (Jan 22), 29.6% (Oct 21)
Tesla: 26.8% (Jan 22), 28.5% (Oct 21)
GM: 8.5% (Jan 22), 6.8% (Oct 21)
Rivian: 3.9% (Jan 22), 2.1% (Oct 21)
Lucid: 0.5% (Jan 22), 0.4% (Oct 21)
Fisker: 0.4% (Jan 22), 0.4% (Oct 21)

■ Jan (22)
■ Oct (21)

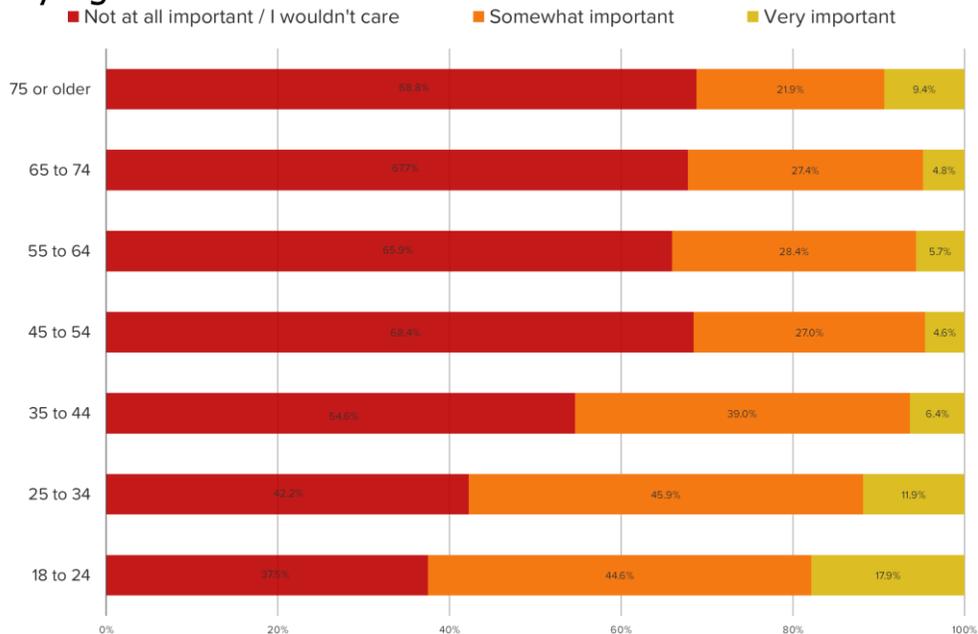## IF YOU WERE LOOKING TO GET A NEW CAR, HOW IMPORTANT WOULD IT BE FOR THE CAR TO HAVE SELF-DRIVING OR AUTONOMOUS DRIVING FEATURES?
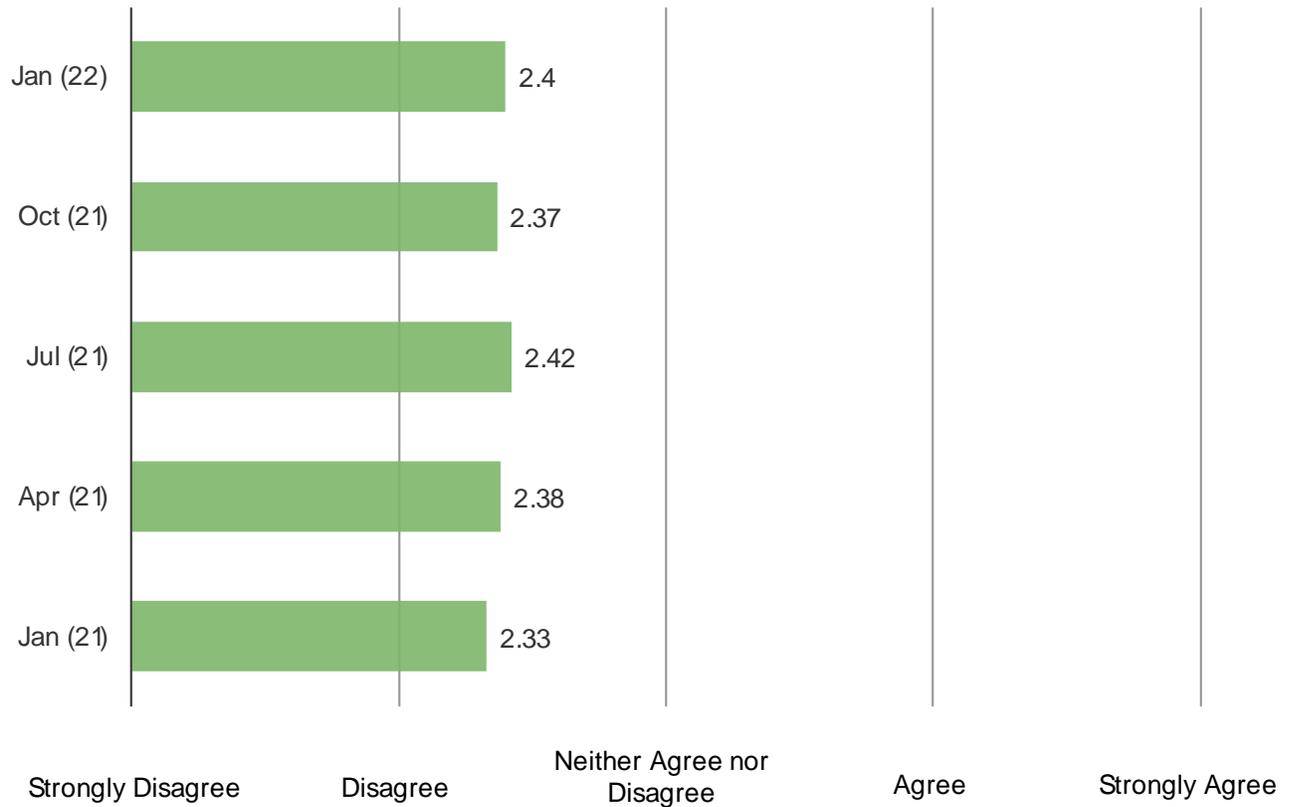
Posed to respondents who own/lease a car.

Period	Value
Jan (22)	1.49
Oct (21)	1.47
Jul (21)	1.47
Apr (21)	1.43
Jan (21)	1.43

Not At All Important — Somewhat Important — Very Important

Data Cross-Tabbed By Age

■ Not at all important / I wouldn't care   ■ Somewhat important   ■ Very important

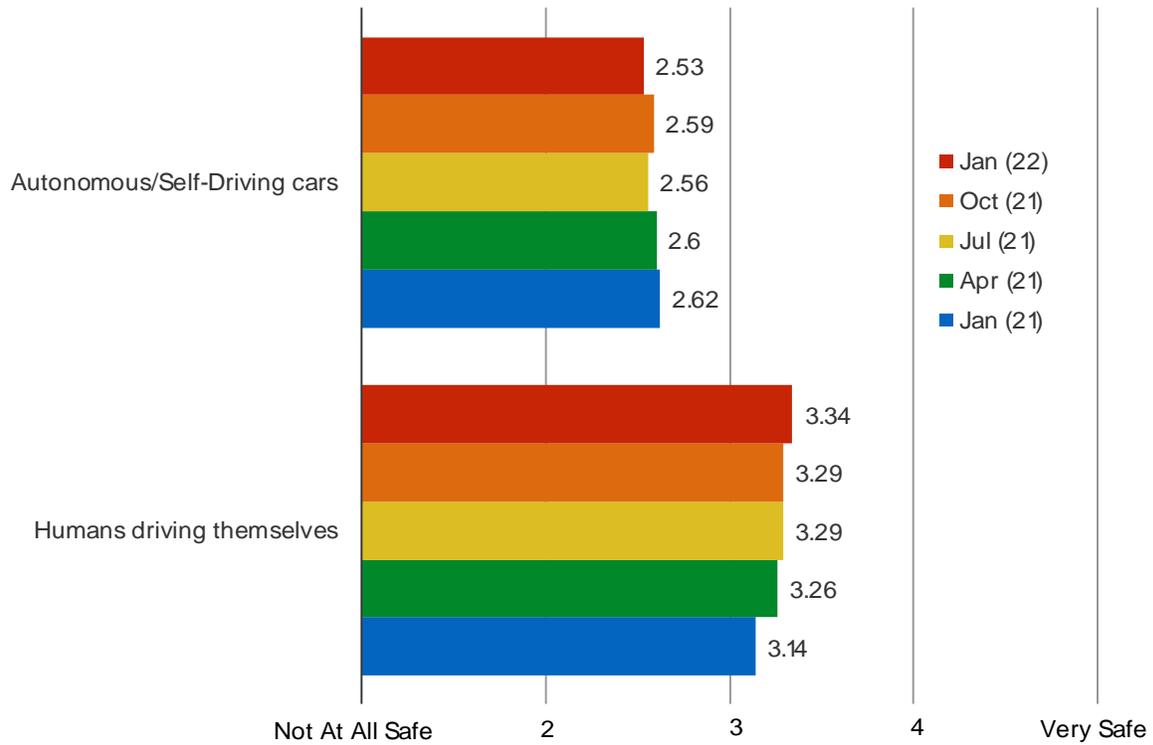| Age	Not at all important / I wouldn't care	Somewhat important	Very important
75 or older	68.8%	21.9%	9.4%
65 to 74	67.7%	27.4%	4.8%
55 to 64	65.9%	28.4%	5.7%
45 to 54	68.4%	27.0%	4.6%
35 to 44	54.6%	39.0%	6.4%
25 to 34	42.2%	45.9%	11.9%
18 to 24	37.5%	44.6%	17.9%

Electric and Autonomous Vehicles | Domestic

TO WHAT EXTENT DO YOU AGREE: "IT WOULD BE WORTH IT TO SPEND MORE ON A CAR/AUTO IN ORDER FOR IT TO HAVE SELF-DRIVING/AUTONOMOUS CAPABILITIES"

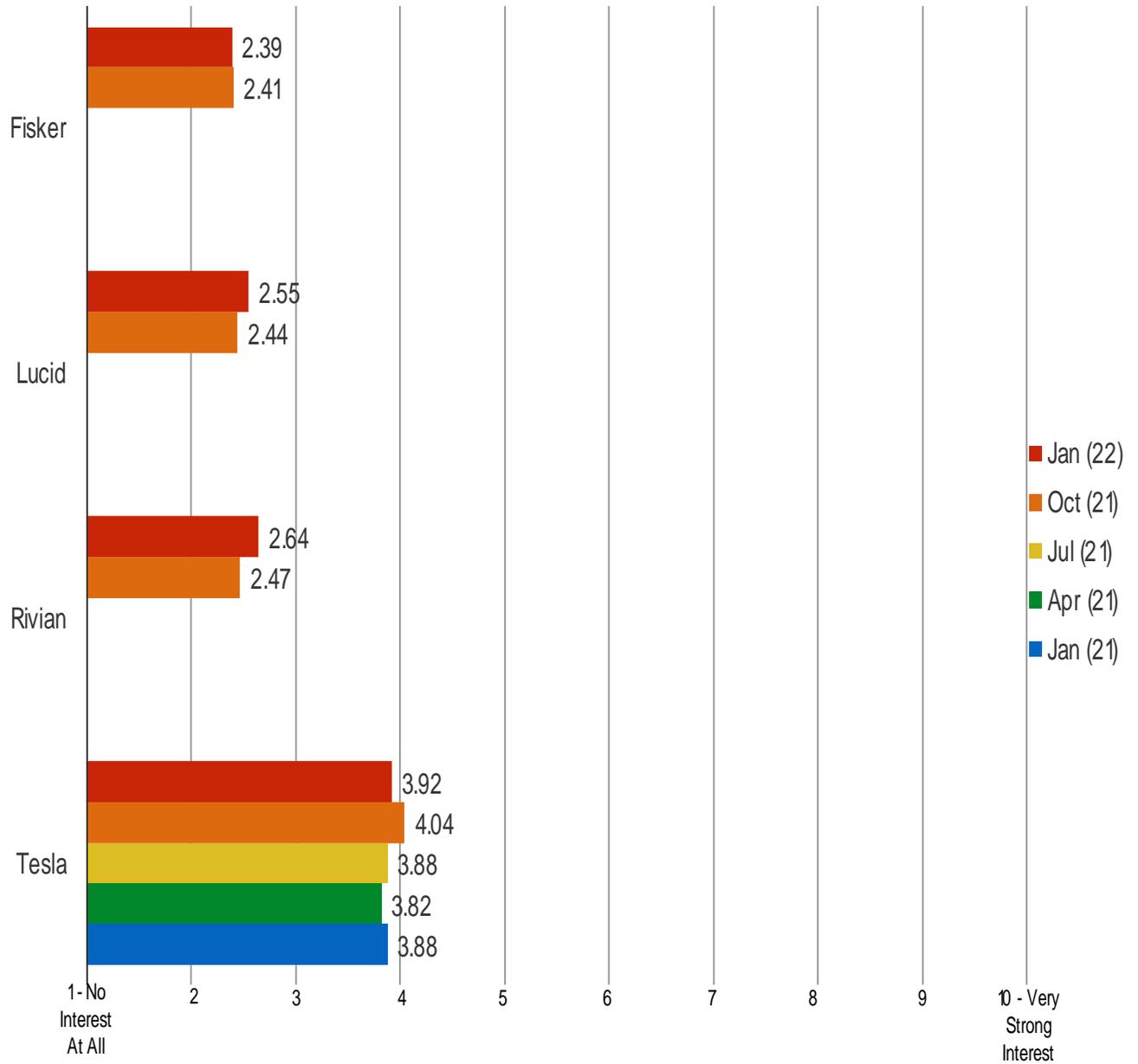Posed to respondents who own/lease a car.

Period	Value
Jan (22)	2.4
Oct (21)	2.37
Jul (21)	2.42
Apr (21)	2.38
Jan (21)	2.33

Scale: Strongly Disagree — Disagree — Neither Agree nor Disagree — Agree — Strongly Agree

Electric and Autonomous Vehicles | Domestic

HOW WOULD YOU RATE HOW SAFE THE FOLLOWING ARE?

Posed to respondents who own/lease a car.

Autonomous/Self-Driving cars
- Jan (22): 2.53
- Oct (21): 2.59
- Jul (21): 2.56
- Apr (21): 2.6
- Jan (21): 2.62

Humans driving themselves
- Jan (22): 3.34
- Oct (21): 3.29
- Jul (21): 3.29
- Apr (21): 3.26
- Jan (21): 3.14

Legend:
- Jan (22)
- Oct (21)
- Jul (21)
- Apr (21)
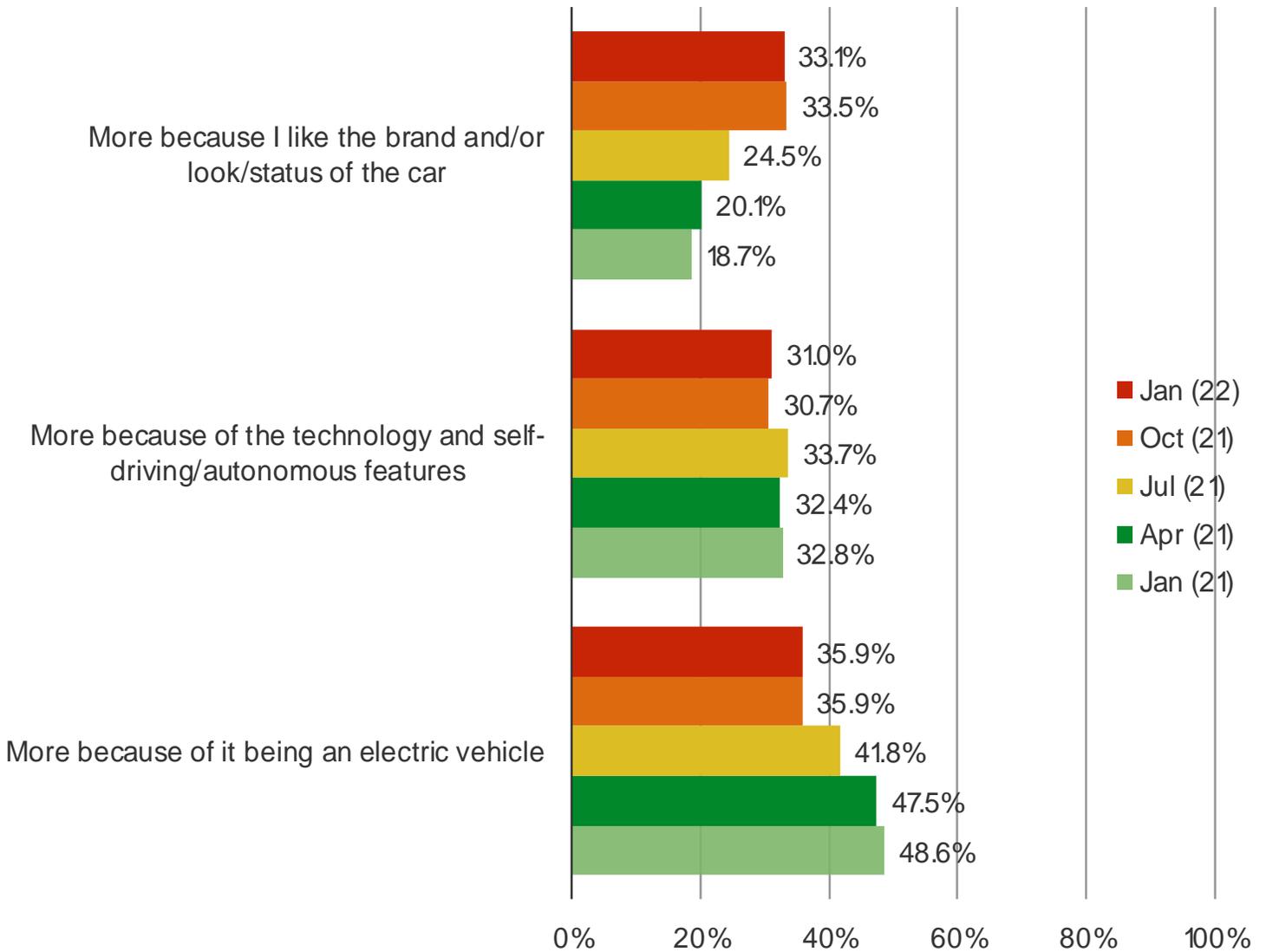- Jan (21)

X-axis: Not At All Safe — 2 — 3 — 4 — Very Safe

HOW MUCH INTEREST DO YOU HAVE IN GETTING A CAR/AUTO FROM THE FOLLOWING AT SOME POINT IN THE FUTURE?

Posed to respondents who own/lease a car.

Legend:
- Jan (22)
- Oct (21)
- Jul (21)
- Apr (21)
- Jan (21)

Fisker
- 2.39
- 2.41

Lucid
- 2.55
- 2.44

Rivian
- 2.64
- 2.47

Tesla
- 3.92
- 4.04
- 3.88
- 3.82
- 3.88

X-axis: 1 - No Interest At All ... 2 ... 3 ... 4 ... 5 ... 6 ... 7 ... 8 ... 9 ... 10 - Very Strong Interest
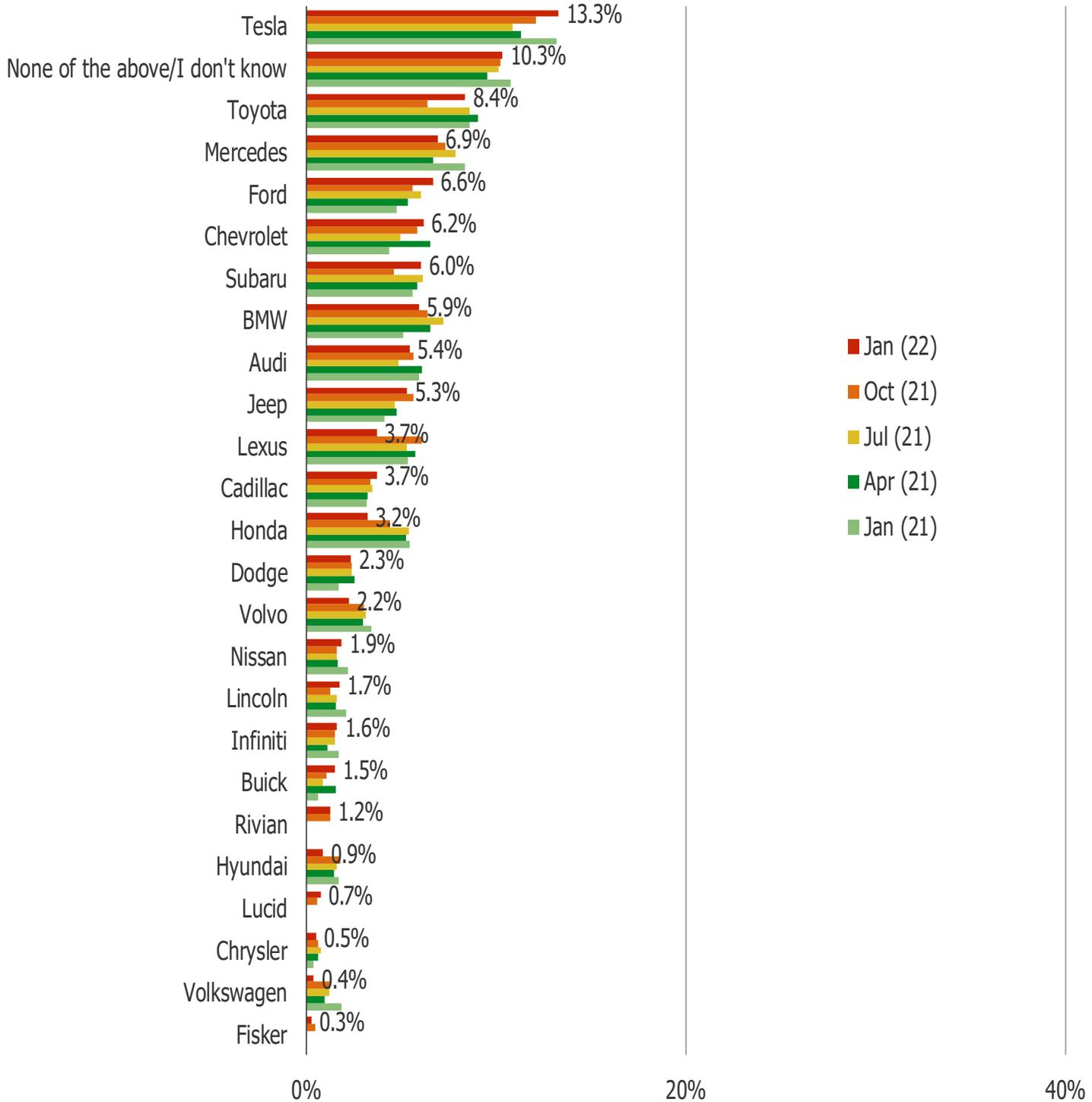
WHAT IS THE PRIMARY REASON THAT YOU WOULD BE INTERESTED IN GETTING A TESLA?

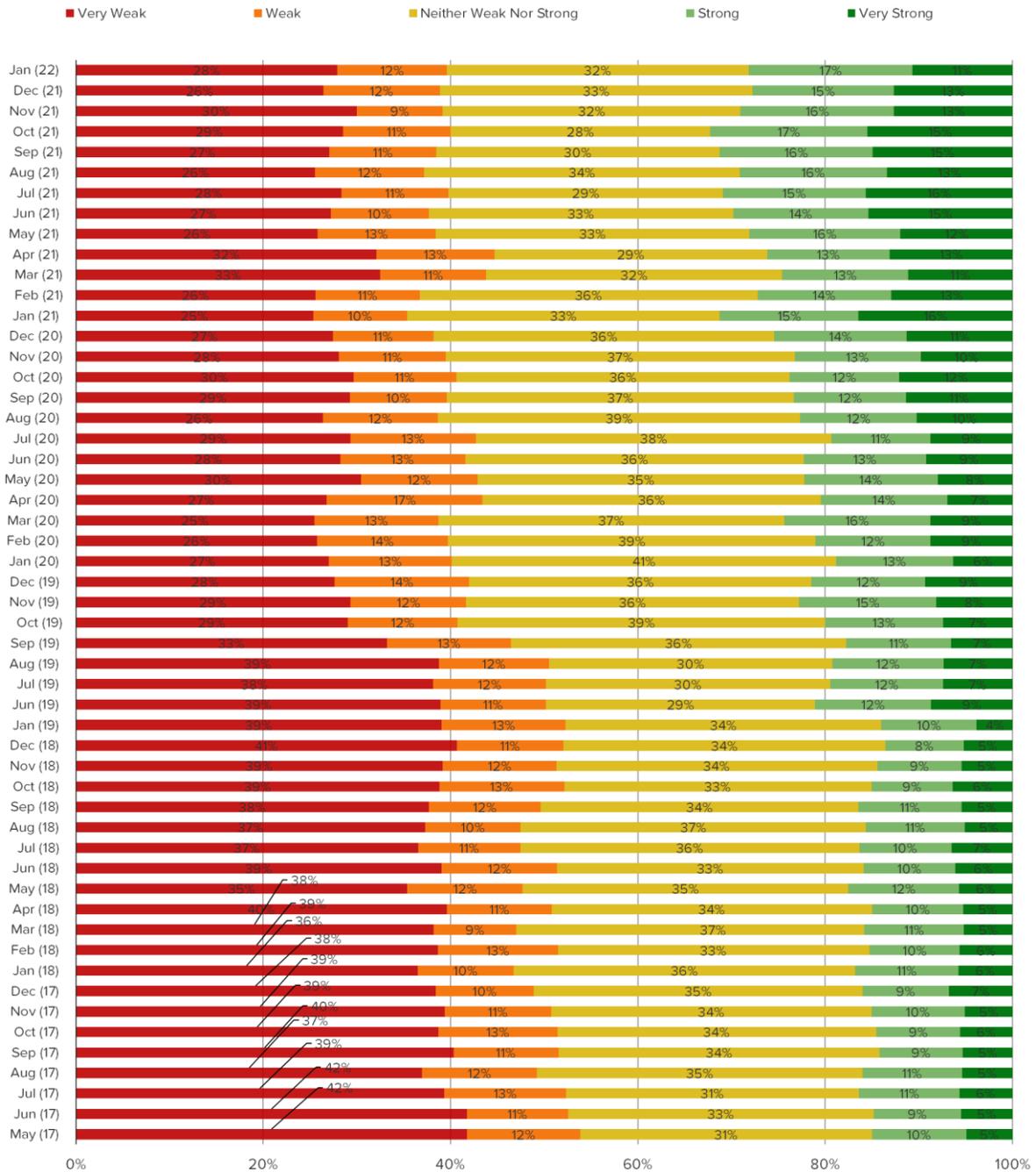Posed to respondents who own/lease a car and have interest in getting a Tesla.

More because I like the brand and/or look/status of the car
- Jan (22): 33.1%
- Oct (21): 33.5%
- Jul (21): 24.5%
- Apr (21): 20.1%
- Jan (21): 18.7%

More because of the technology and self-driving/autonomous features
- Jan (22): 31.0%
- Oct (21): 30.7%
- Jul (21): 33.7%
- Apr (21): 32.4%
- Jan (21): 32.8%

More because of it being an electric vehicle
- Jan (22): 35.9%
- Oct (21): 35.9%
- Jul (21): 41.8%
- Apr (21): 47.5%
- Jan (21): 48.6%

Legend:
- Jan (22)
- Oct (21)
- Jul (21)
- Apr (21)
- Jan (21)

IF PRICE WAS NO OBJECT, WHICH OF THE FOLLOWING BRANDS WOULD YOU MOST DESIRE TO GET?

Posed to respondents who own/lease a car.

Brand	Jan (22)
Tesla	13.3%
None of the above/I don't know	10.3%
Toyota	8.4%
Mercedes	6.9%
Ford	6.6%
Chevrolet	6.2%
Subaru	6.0%
BMW	5.9%
Audi	5.4%
Jeep	5.3%
Lexus	3.7%
Cadillac	3.7%
Honda	3.2%
Dodge	2.3%
Volvo	2.2%
Nissan	1.9%
Lincoln	1.7%
Infiniti	1.6%
Buick	1.5%
Rivian	1.2%
Hyundai	0.9%
Lucid	0.7%
Chrysler	0.5%
Volkswagen	0.4%
Fisker	0.3%

Legend:
- Jan (22)
- Oct (21)
- Jul (21)
- Apr (21)
- Jan (21)

Electric and Autonomous Vehicles | Domestic

PLEASE RATE YOUR DESIRE TO OWN OR LEASE A TESLA AT SOME POINT IN THE FUTURE.

Posed to all respondents.

Legend: Very Weak | Weak | Neither Weak Nor Strong | Strong | Very Strong

Month	Very Weak	Weak	Neither Weak Nor Strong	Strong	Very Strong
Jan (22)	28%	12%	32%	17%	11%
Dec (21)	26%	12%	33%	15%	13%
Nov (21)	30%	9%	32%	16%	13%
Oct (21)	29%	11%	28%	17%	15%
Sep (21)	27%	11%	30%	16%	15%
Aug (21)	26%	12%	34%	16%	13%
Jul (21)	28%	11%	29%	15%	16%
Jun (21)	27%	10%	33%	14%	15%
May (21)	26%	13%	33%	16%	12%
Apr (21)	32%	13%	29%	13%	13%
Mar (21)	33%	11%	32%	13%	11%
Feb (21)	26%	11%	36%	14%	13%
Jan (21)	25%	10%	33%	15%	16%
Dec (20)	27%	11%	36%	14%	11%
Nov (20)	28%	11%	37%	13%	10%
Oct (20)	30%	11%	36%	12%	12%
Sep (20)	29%	10%	37%	12%	11%
Aug (20)	26%	12%	39%	12%	10%
Jul (20)	29%	13%	38%	11%	9%
Jun (20)	28%	13%	36%	13%	9%
May (20)	30%	12%	35%	14%	8%
Apr (20)	27%	17%	36%	14%	7%
Mar (20)	25%	13%	37%	16%	9%
Feb (20)	26%	14%	39%	12%	9%
Jan (20)	27%	13%	41%	13%	6%
Dec (19)	28%	14%	36%	12%	9%
Nov (19)	29%	12%	36%	15%	8%
Oct (19)	29%	12%	39%	13%	7%
Sep (19)	33%	13%	36%	11%	7%
Aug (19)	39%	12%	30%	12%	7%
Jul (19)	35%	12%	30%	12%	7%
Jun (19)	39%	11%	29%	12%	9%
Jan (19)	39%	13%	34%	10%	4%
Dec (18)	41%	11%	34%	8%	5%
Nov (18)	39%	12%	34%	9%	5%
Oct (18)	39%	13%	33%	9%	6%
Sep (18)	38%	12%	34%	11%	5%
Aug (18)	37%	10%	37%	11%	5%
Jul (18)	37%	11%	36%	10%	7%
Jun (18)	39%	12%	33%	10%	6%
May (18)	35%	38%	12%	35%	12%	6%
Apr (18)	40%	39%	11%	34%	10%	6%
Mar (18)	36%	9%	37%	11%	5%
Feb (18)	38%	13%	33%	10%	6%
Jan (18)	39%	10%	36%	11%	6%
Dec (17)	39%	10%	35%	9%	7%
Nov (17)	40%	11%	34%	10%	6%
Oct (17)	37%	13%	34%	9%	6%
Sep (17)	39%	11%	34%	9%	5%
Aug (17)	43%	12%	35%	11%	5%
Jul (17)	42%	13%	31%	11%	6%
Jun (17)	11%	33%	9%	5%
May (17)	12%	31%	10%	5%

EV VISUALS

WE SHOWED RESPONDENTS VISUALS OF VARIOUS EV BRANDS AND ASKED FOR THEIR OPINION. PRICES WERE NOT MENTIONED, JUST VISUALS OF THE VEHICLES.

RIVIAN PICK-UP

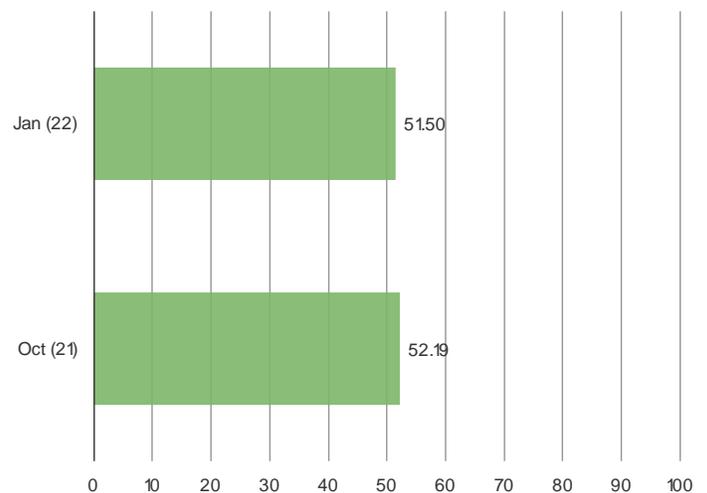Posed to all respondents who have plans to purchase or lease a vehicle in the future.

Likelihood to Buy

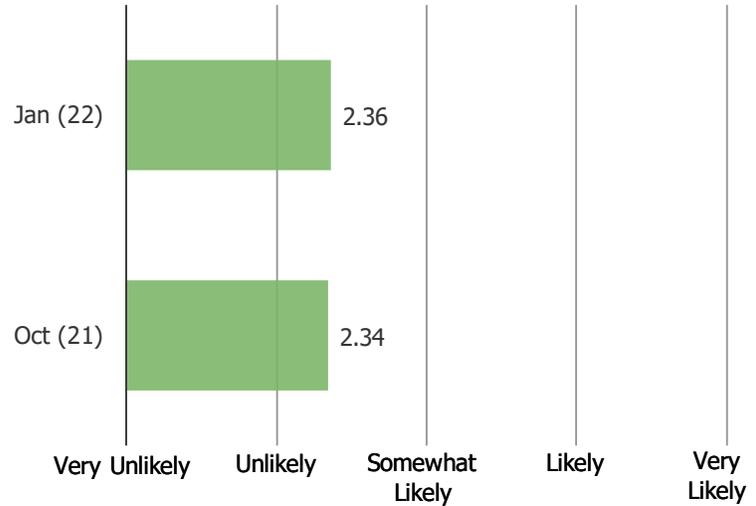|	
Jan (22)	2.19
Oct (21)	2.11

Very — Unlikely — Somewhat Likely — Likely — Very Likely

Appearance

Jan (22)	43.89
Oct (21)	41.56

0 (I don't like it at all) -> 100 (I love the way it looks)

Economy vs Luxury

Jan (22)	51.50
Oct (21)	52.19
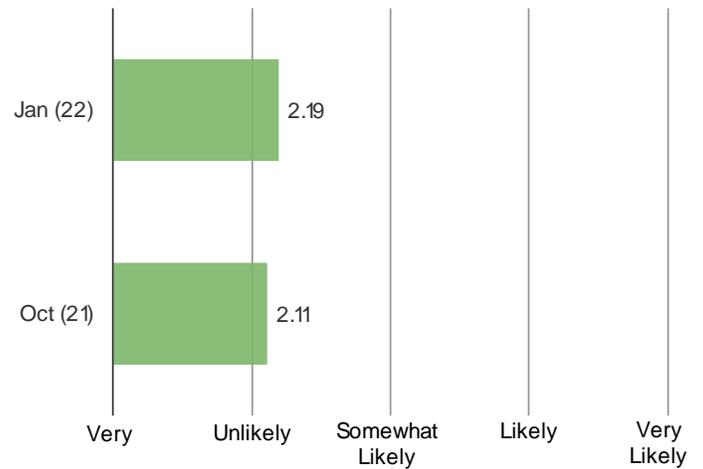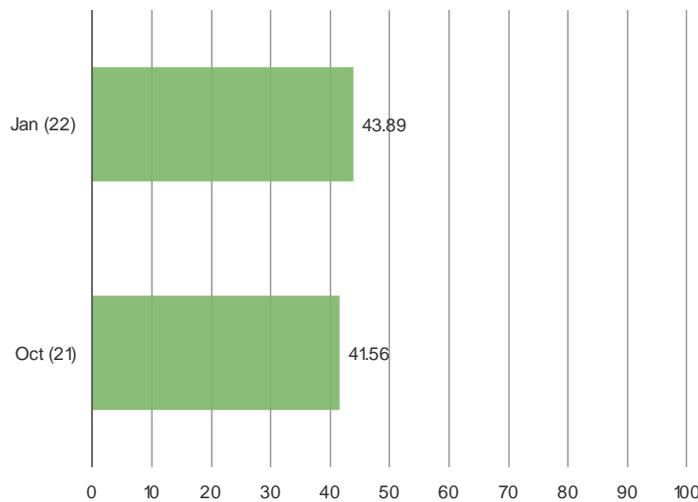
0 (Economy) -> 100 (Luxury)

RIVIAN SUV

Posed to all respondents who have plans to purchase or lease a vehicle in the future.

Likelihood to Buy
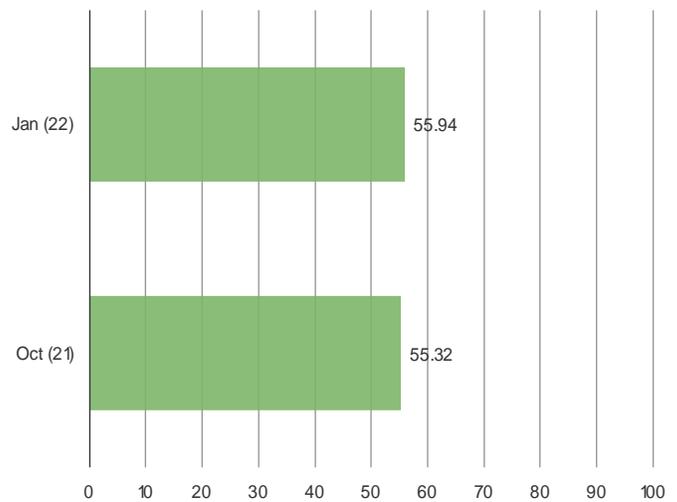
Jan (22)	2.36
Oct (21)	2.34

Very Unlikely · Unlikely · Somewhat Likely · Likely · Very Likely

Appearance

Jan (22)	46.06
Oct (21)	46.84

0 10 20 30 40 50 60 70 80 90 100

0 (I don't like it at all) -> 100 (I love the way it looks)

Economy vs Luxury

Jan (22)	58.24
Oct (21)	60.35

0 10 20 30 40 50 60 70 80 90 100
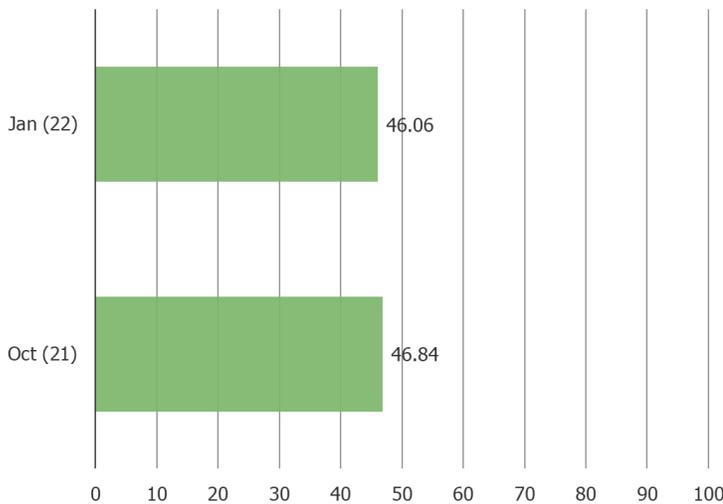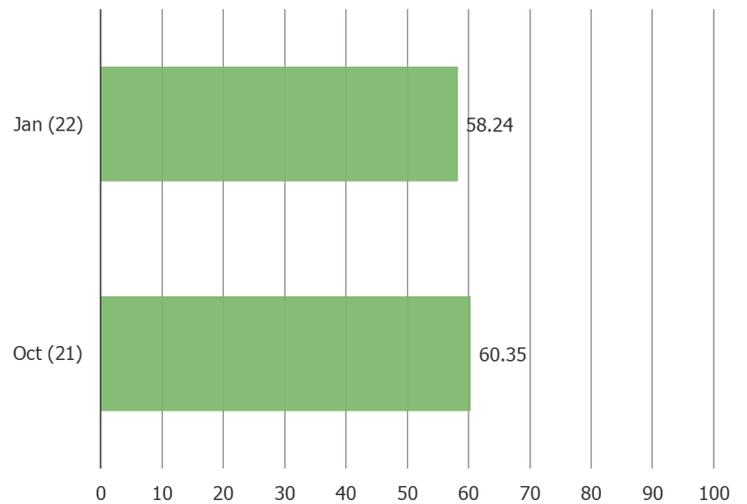
0 (Economy) -> 100 (Luxury)

LUCID SUV

Posed to all respondents who have plans to purchase or lease a vehicle in the future.

Likelihood to Buy

Jan (22)	2.17
Oct (21)	2.21

Very Unlikely — Unlikely — Somewhat Likely — Likely — Very Likely

Appearance

Jan (22)	58.24
Oct (21)	60.35

0 (I don't like it at all) -> 100 (I love the way it looks)

Economy vs Luxury

Jan (22)	53.08
Oct (21)	53.71
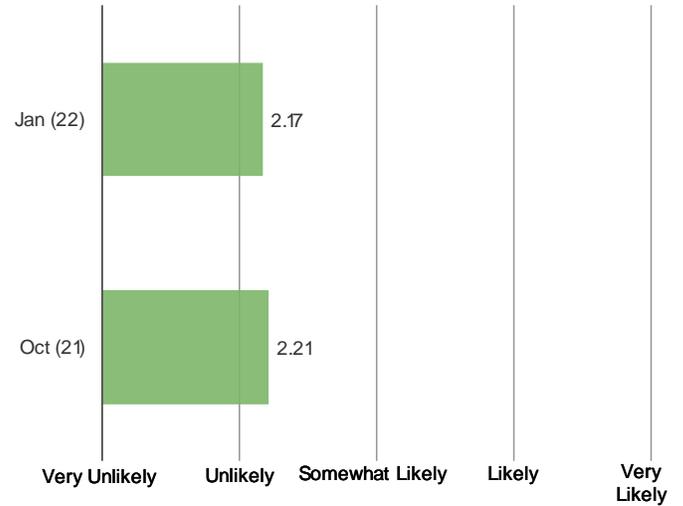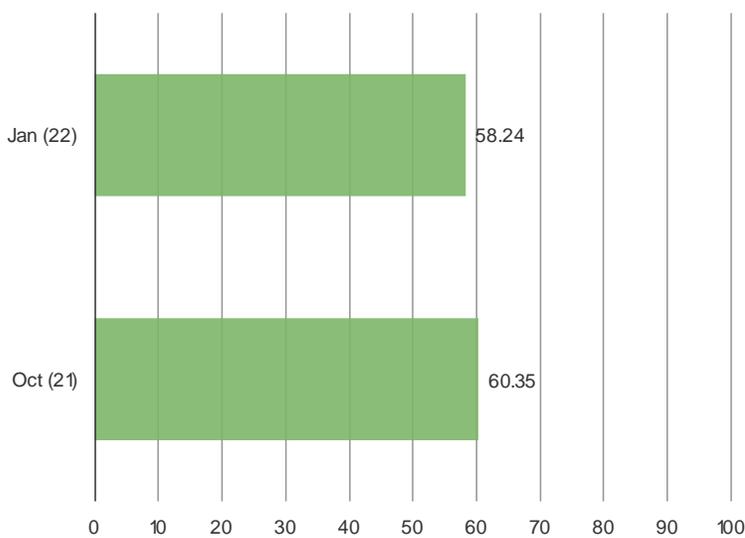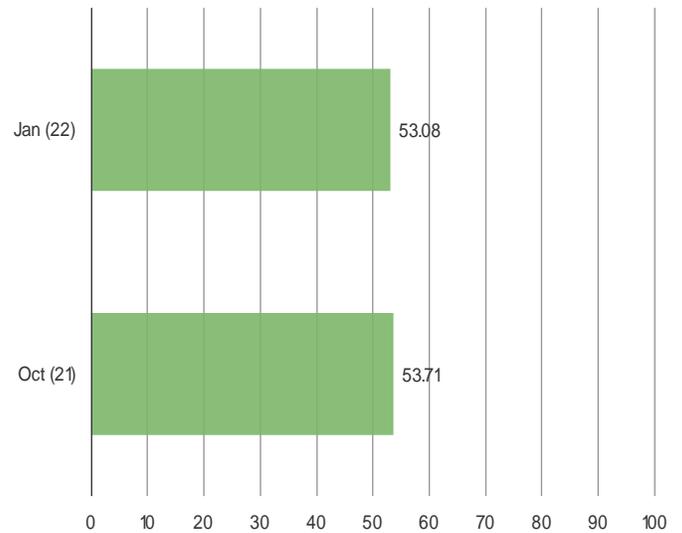
0 (Economy) -> 100 (Luxury)

FISKER SUV

Posed to all respondents who have plans to purchase or lease a vehicle in the future.

Likelihood to Buy

Period	Value
Jan (22)	2.65
Oct (21)	2.65

Very Unlikely — Unlikely — Somewhat Likely — Likely — Very Likely

Appearance

Period	Value
Jan (22)	55.37
Oct (21)	55.00

0 (I don't like it at all) -> 100 (I love the way it looks)

Economy vs Luxury

Period	Value
Jan (22)	55.94
Oct (21)	55.32
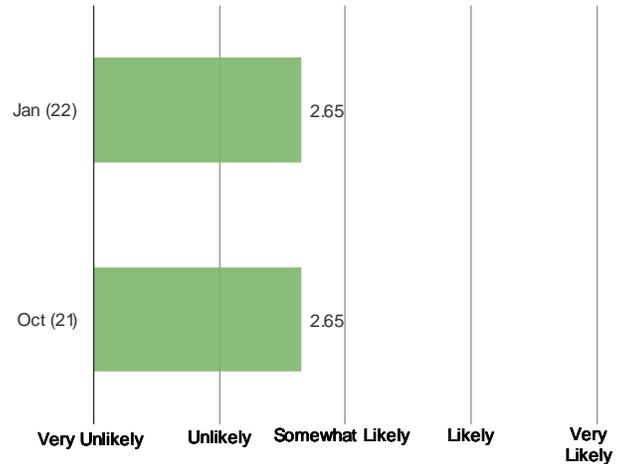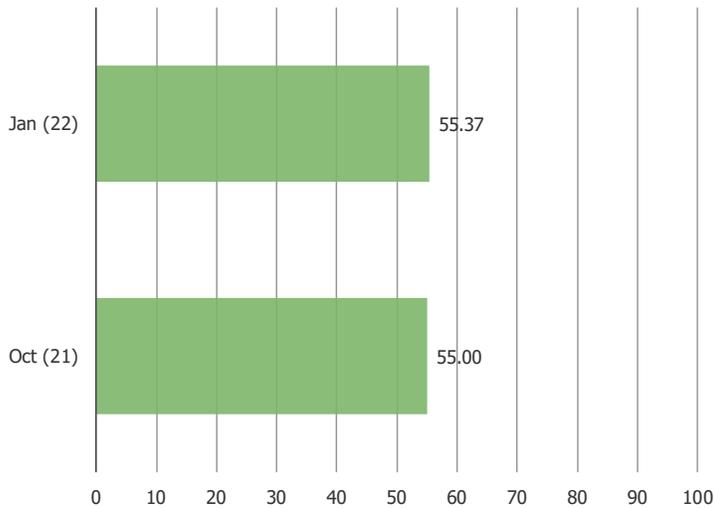
0 (Economy) -> 100 (Luxury)

TESLA CYBERTRUCK

Posed to all respondents who have plans to purchase or lease a vehicle in the future.
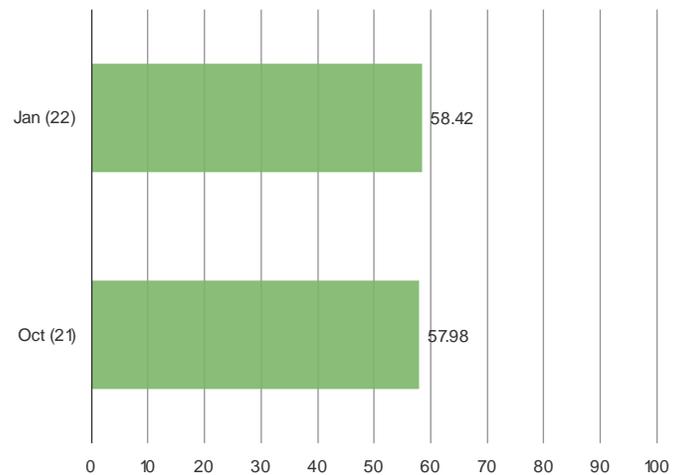

Likelihood to Buy

Jan (22)	1.47
Oct (21)	1.59

Very Unlikely — Unlikely — Somewhat Likely — Likely — Very Likely

Appearance

Jan (22)	18.34
Oct (21)	19.93

0 (I don't like it at all) -> 100 (I love the way it looks)

Economy vs Luxury

Jan (22)	58.42
Oct (21)	57.98
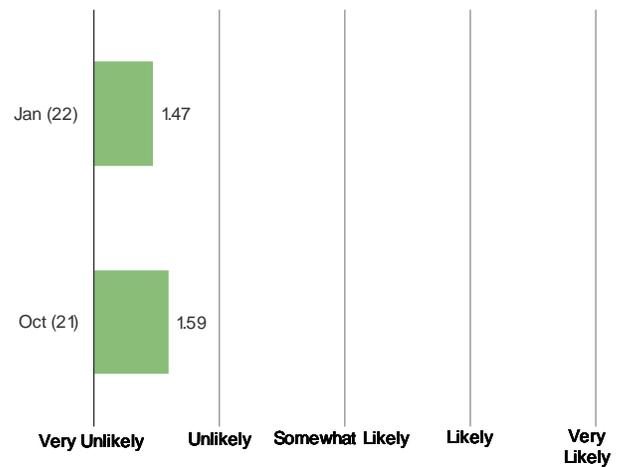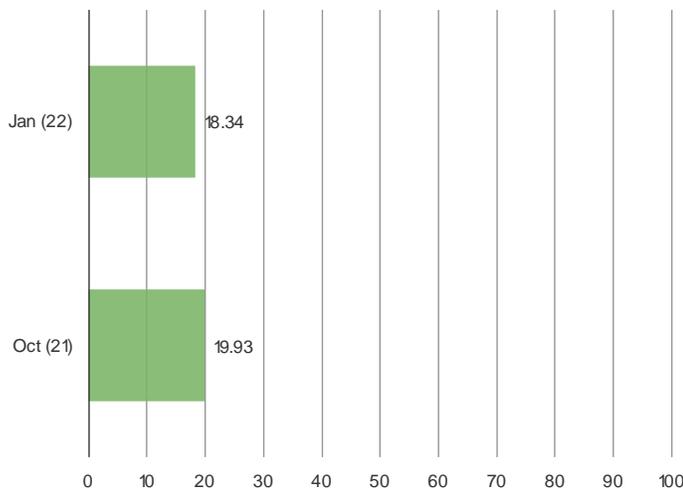
0 (Economy) -> 100 (Luxury)
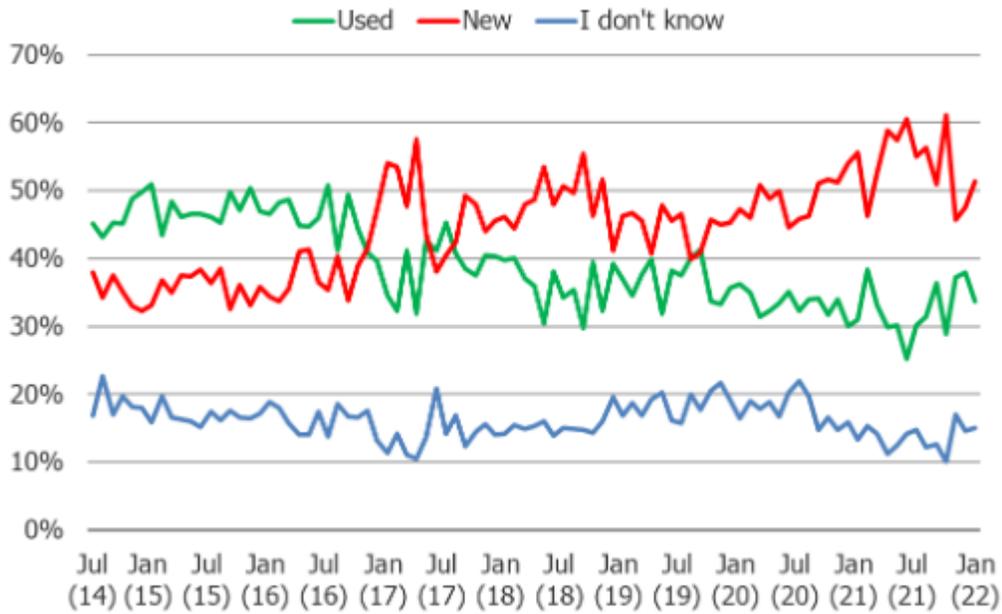
MONTHLY AUTO TRACKER QUESTIONS

DO YOU PLAN TO PURCHASE/LEASE A NEW VEHICLE IN THE NEXT 6 MONTHS?

Posed to all respondents.
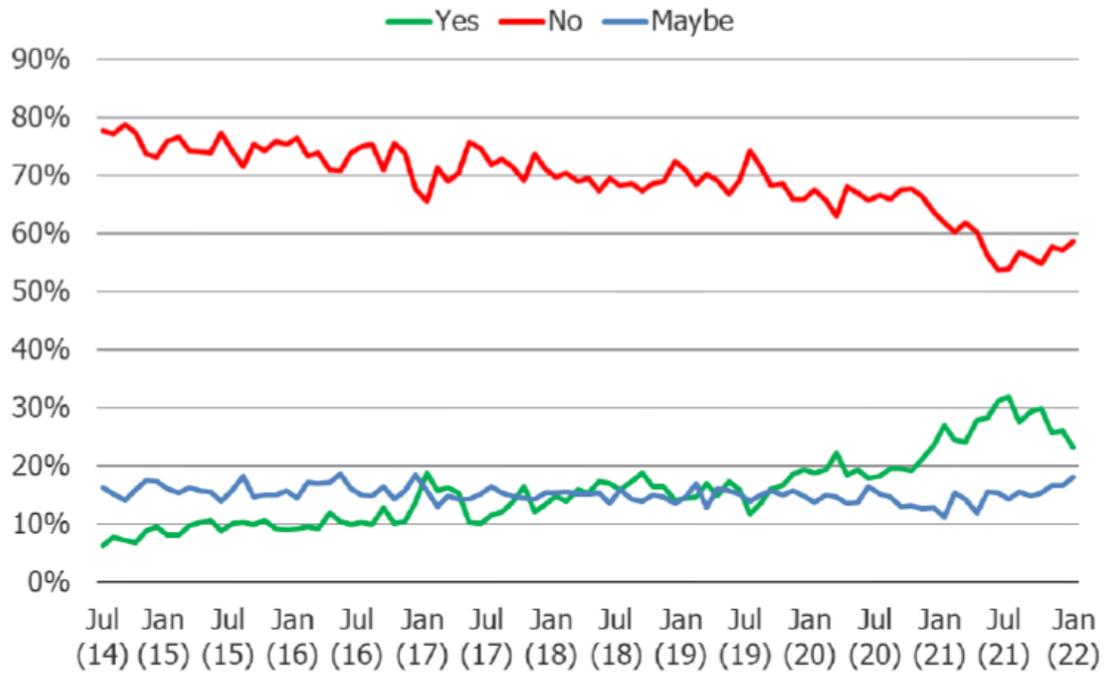
DO YOU PLAN TO PURCHASE/LEASE A NEW VEHICLE IN THE NEXT 6 MONTHS?

Respondents who replied yes or maybe about buying a new vehicle in the next 6 months.

WHICH TYPES OF AUTOMOBILE WOULD YOU BE MOST LIKELY TO PURCHASE IN THE NEXT SIX MONTHS?

Respondents who replied yes or maybe about buying a new vehicle in the next 6 months.

Audi

BMW

Chrysler/Jeep/Dodge

Ford/Lincoln

General Motors (Chevrolet, Buick, Cadillac)

Honda

Hyundai

Mercedes

Nissan/Infiniti

Subaru

Tesla

Toyota/Lexus

Volkswagen

Volvo

I don't know