

BESPOKE SURVEYS

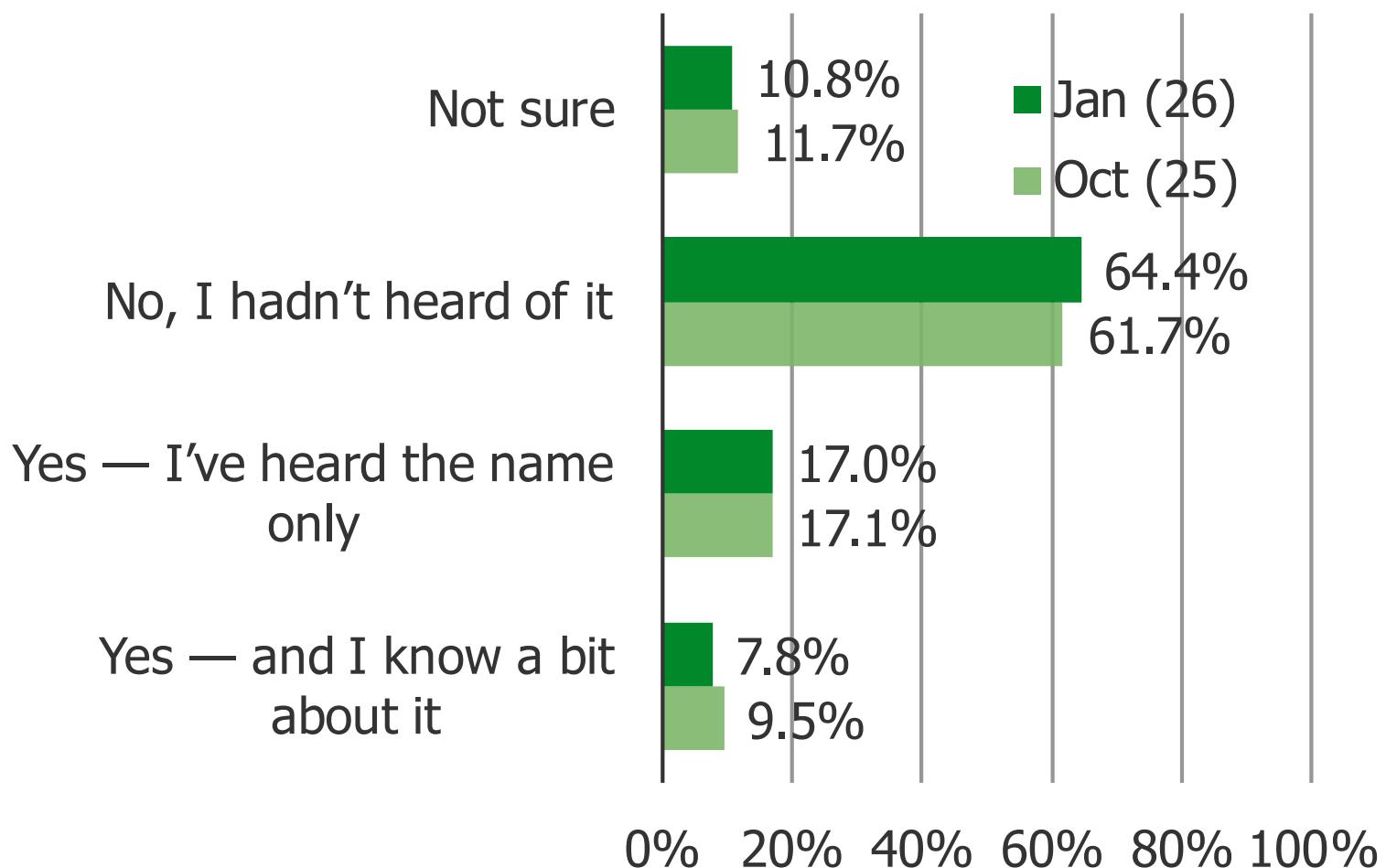
Autos and EVs, Vol 21

1,000 Consumers Per Wave, Balanced to Census

## NEW QUESTIONS

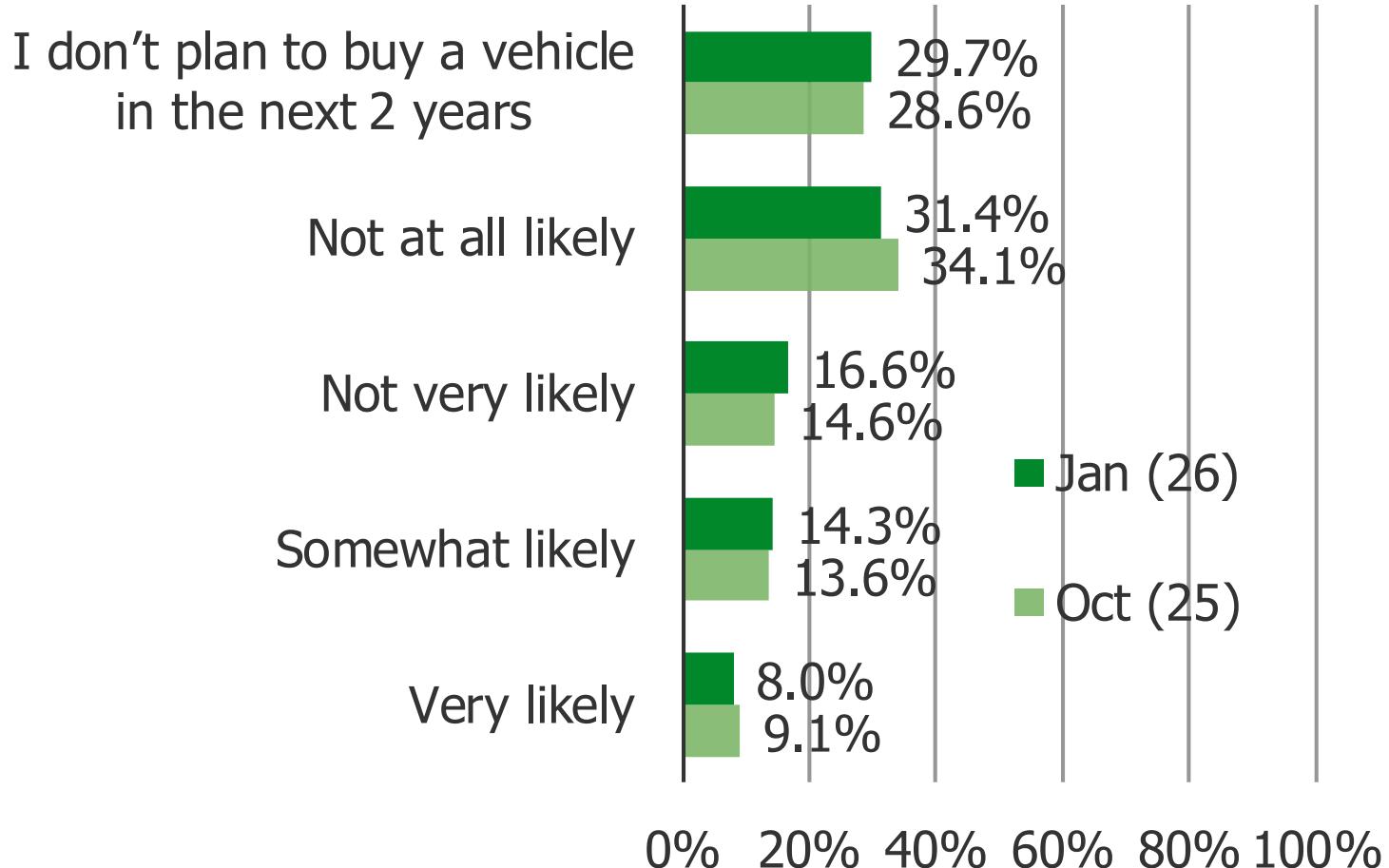
## BEFORE THIS SURVEY, HAD YOU HEARD OF THE RIVIAN R2 (EXPECTED TO LAUNCH IN 2026)?

Posed to all respondents.



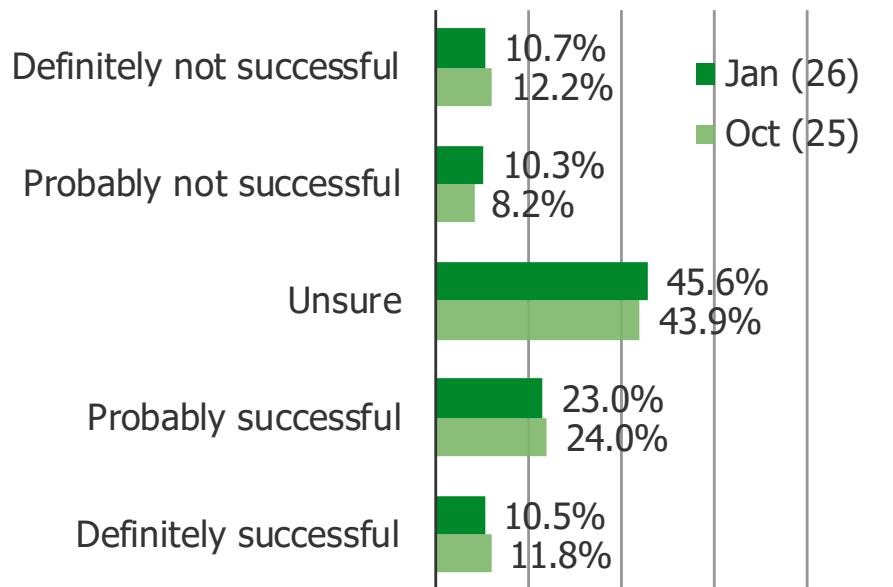
VEHICLE- MSRP WILL START AT \$45K, UP TO \$70K WITH OPTIONS.- BROAD ESTIMATE - FINANCING WILL LIKELY COST IN THE \$600-\$1,200 RANGE PER

Posed to all respondents.



## DO YOU THINK THE RIVIAN R2 WILL BE SUCCESSFUL WHEN IT LAUNCHES?

Posed to all respondents.



## "Why?" fill-ins (tied to answer)

Base (fill-ins): N = 429

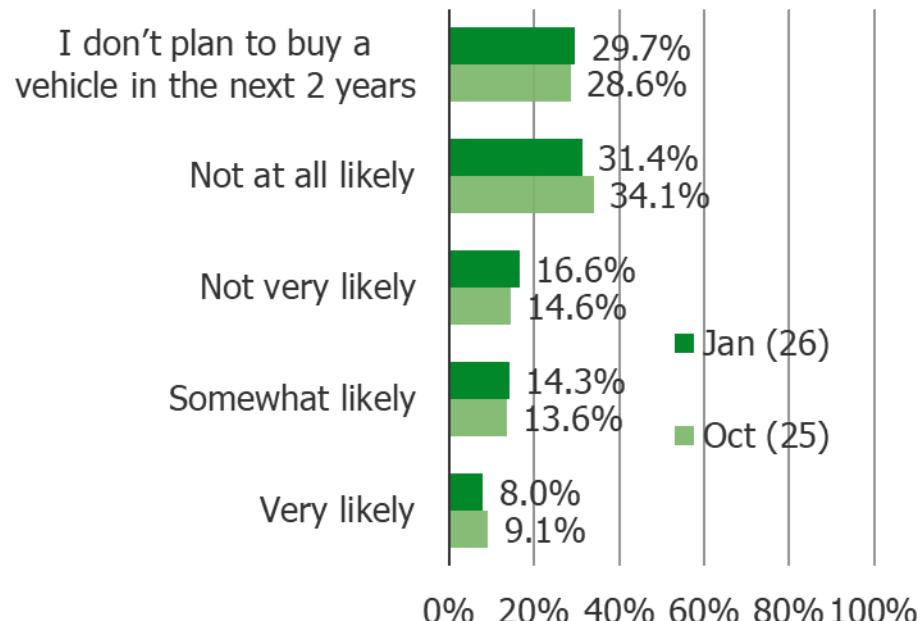
Grouped as:

- **Successful (Net)** = Definitely + Probably successful
- **Not successful (Net)** = Definitely + Probably not successful
- **Unsure**

## Why people said what they said (% within each group)

Reason	Successful (Net)	Not successful (Net)	Unsure
Other / unclear	68.2%	57.1%	63.0%
Price / affordability	3.8%	24.2%	13.3%
EV adoption / charging	10.2%	9.9%	5.5%
Brand / product quality	7.0%	0.0%	2.8%
Market demand	5.1%	2.2%	3.9%
Competition	3.2%	0.0%	1.7%
Non-substantive / don't know	2.5%	5.5%	8.3%
Macro / economy	0.0%	1.1%	1.7%

Based on what you see above and the following facts, how likely are you to consider the Rivian R2 for your next vehicle?- Electric Vehicle- MSRP will start at \$45k, up to \$70k with options.- Broad estimate - financing will likely cost in the \$600-\$1,200 range per month and leasing will likely cost in the \$700-\$1100 range per month.



#### "Why?" fill-ins — coded themes (tied to the answer)

Grouped into:

- Likely (Net) = Very + Somewhat likely
- Unlikely (Net) = Not very + Not at all likely
- Not buying in next 2 years (separate)

#### What people cite most (within each group)

Reason (from fill-ins)	Likely (Net)	Unlikely (Net)	Not buying in next 2 years
Other / unclear	44.8%	28.1%	46.5%
Too expensive / affordability	23.9%	26.0%	18.4%
Interested / want Rivian R2	17.8%	16.4%	10.5%
EV skepticism / charging	8.6%	23.3%	7.0%
Need to replace / necessity	1.8%	1.4%	16.7%
Non-substantive / don't know	2.5%	2.7%	0.9%

### Refined category mix (with “Other” drill-down)

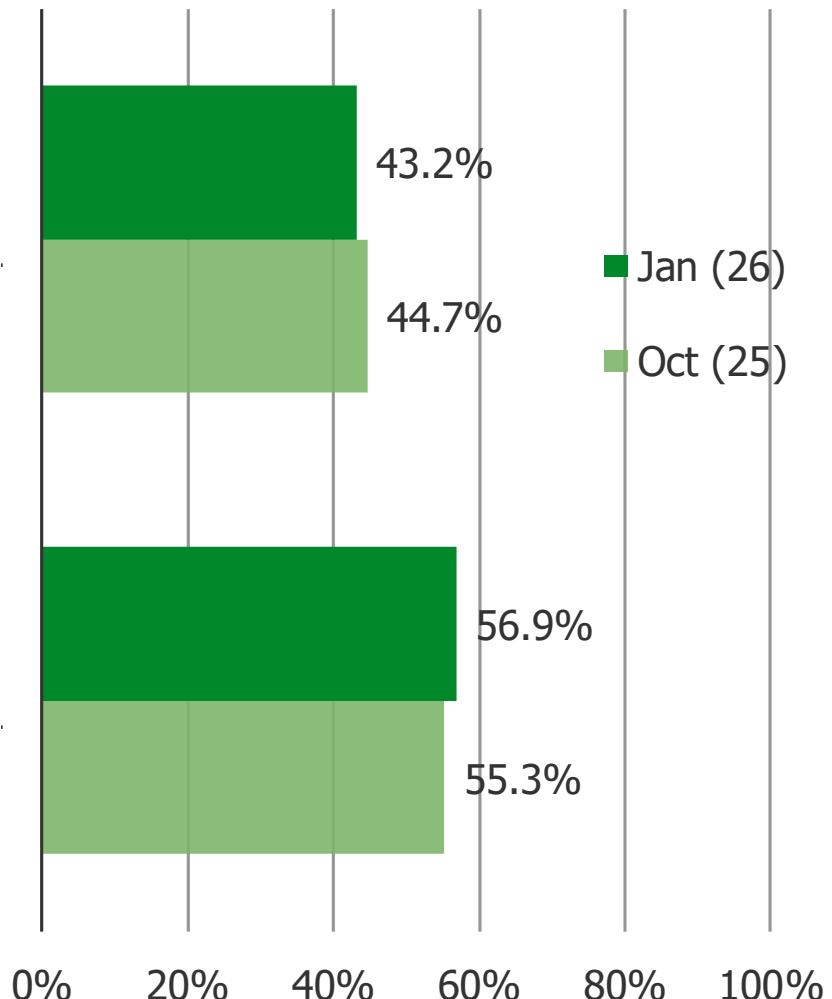
This recode is designed for adjective-style answers:

Category	%
Other / unclear	42.6%
Positive aesthetic	30.1%
Negative aesthetic	18.6%
Neutral / average	3.8%
Non-substantive / don't know	3.2%
Generic descriptor (car/truck/SUV)	1.5%
Nonsense / invalid	0.3%



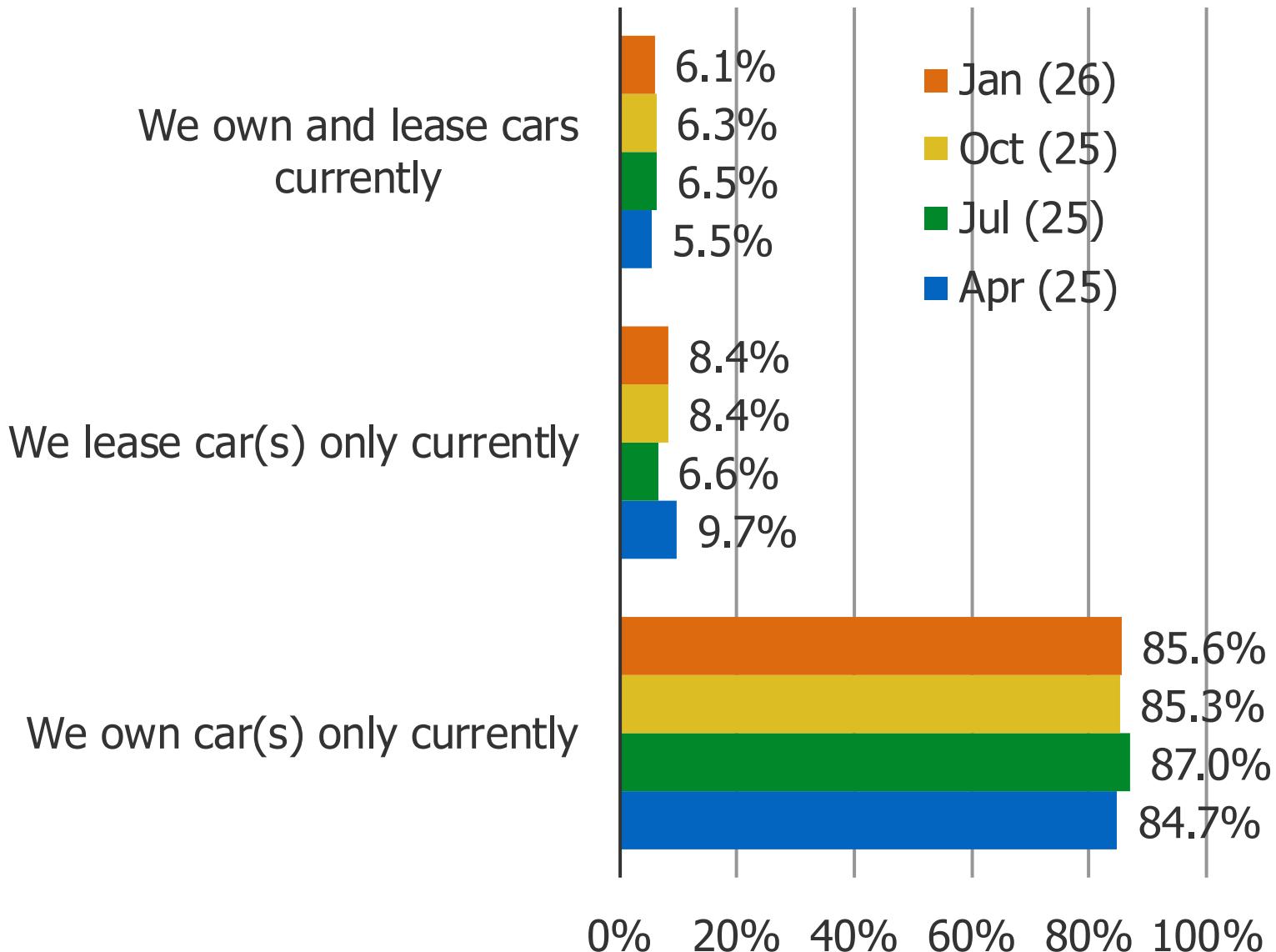
### WHICH OF THE FOLLOWING VEHICLES DO YOU LIKE BETTER?

Posed to all respondents.



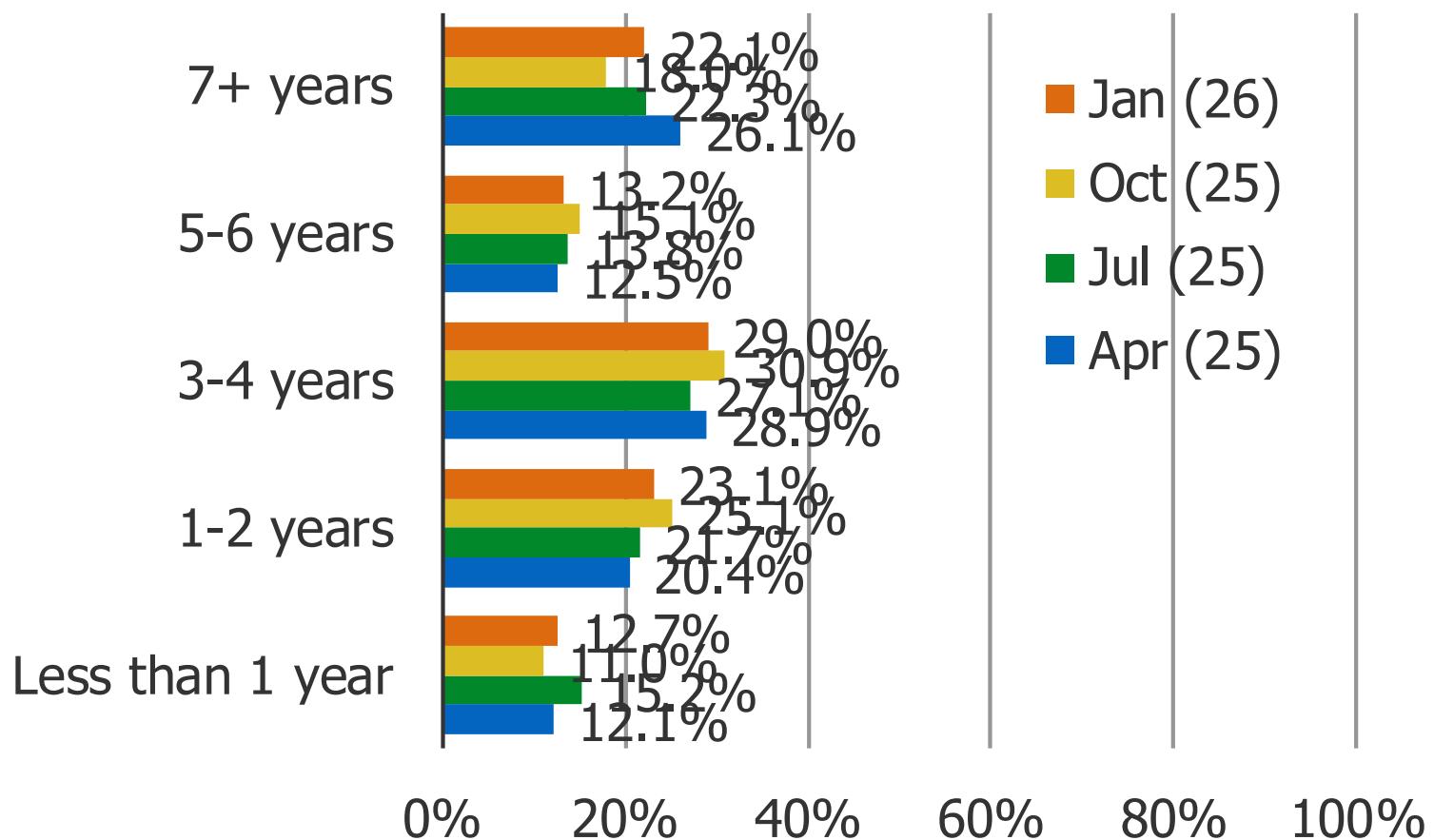
WHICH OF THE FOLLOWING BEST DESCRIBES YOUR HOUSEHOLD...

Posed to all respondents who own or lease a vehicle.



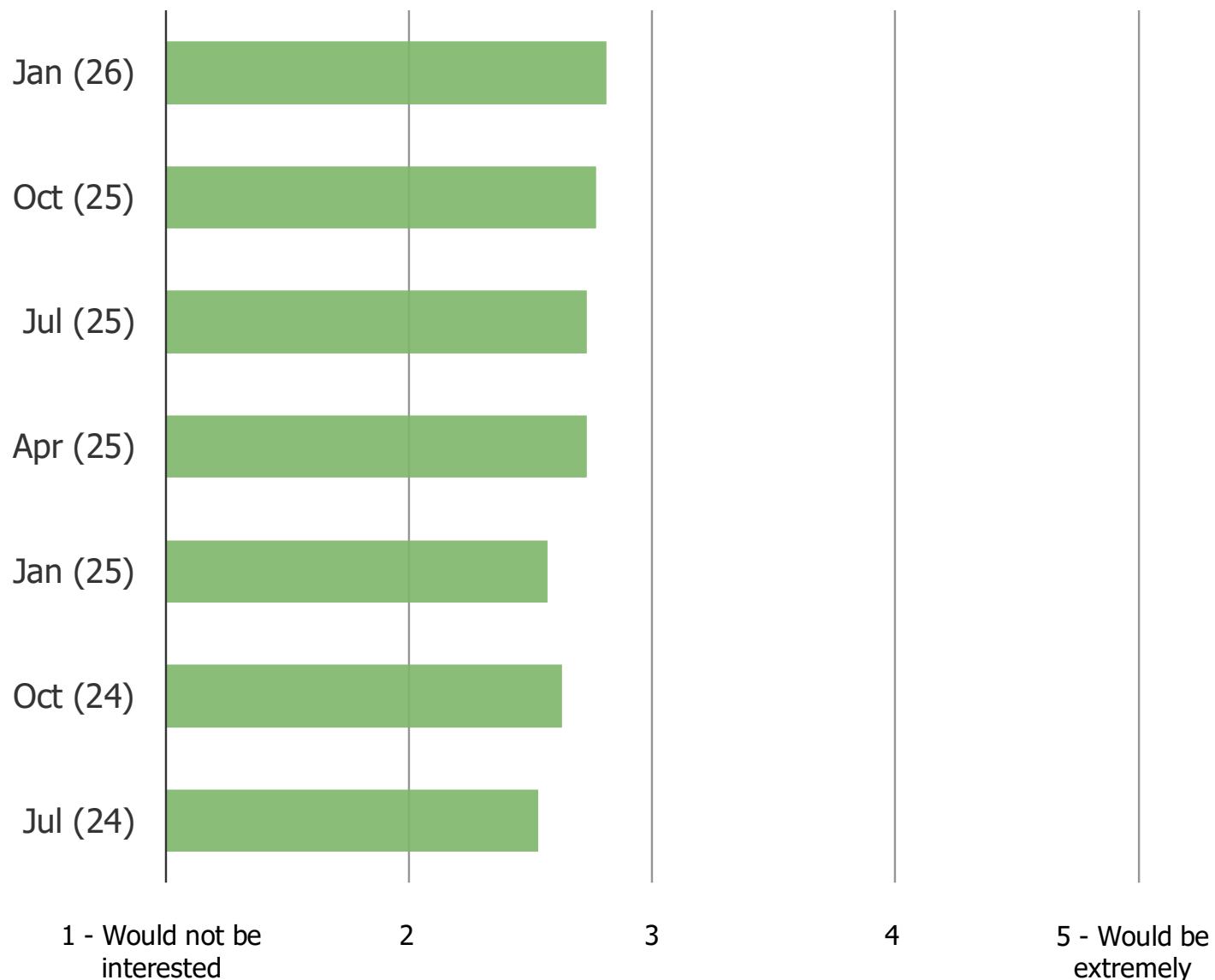
## FOR HOW LONG HAVE YOU OWNED YOUR PRIMARY CAR/VEHICLE?

Posed to all respondents who own or lease a vehicle.



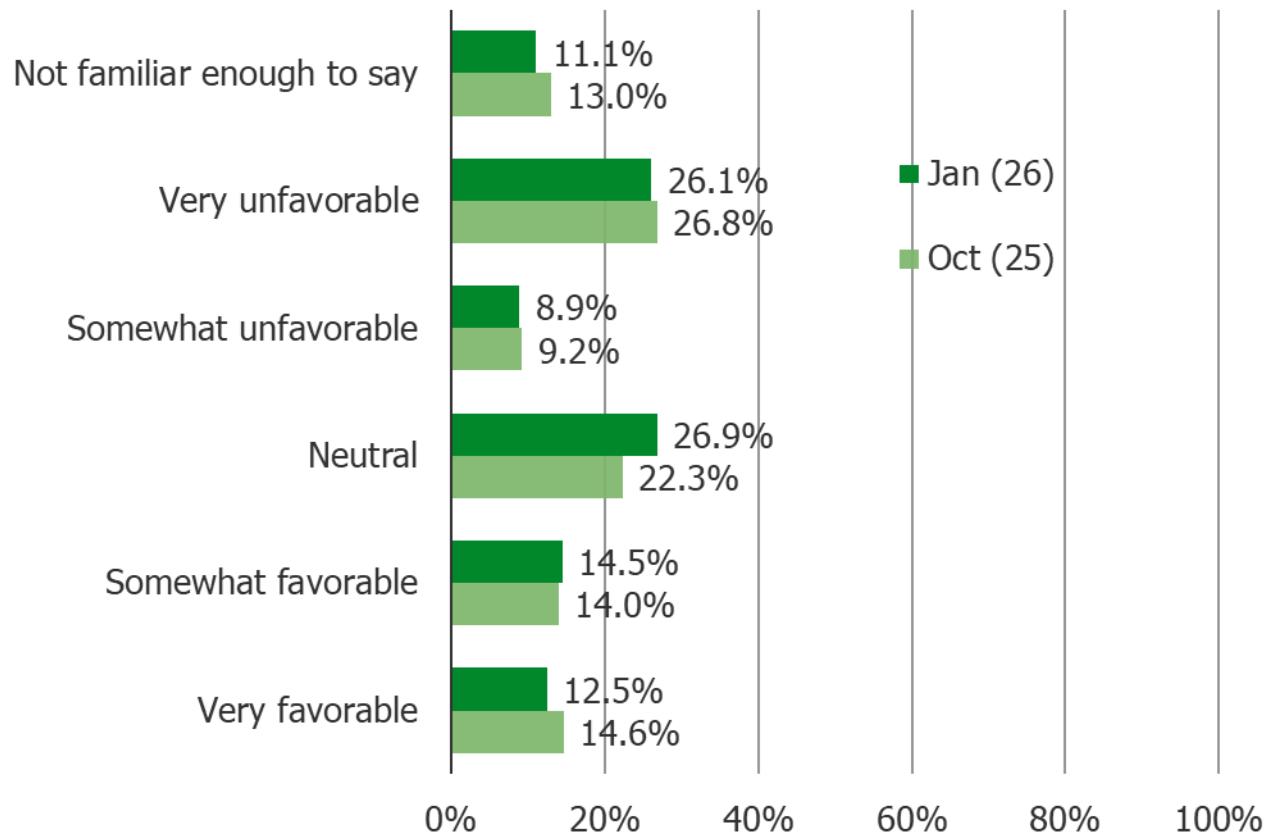
IF AUTONOMOUS DRIVING COULD BE PERFECTED TO THE POINT WHERE IT WAS SAFER THAN HUMANS DRIVING, HOW MUCH INTEREST WOULD YOU HAVE IN HAVING A VEHICLE THAT COULD FULLY DRIVE ITSELF?

Posed to all respondents.



## WHAT IS YOUR OVERALL OPINION OF THE TESLA BRAND?

Posed to all respondents.



## Why people feel Favorable vs Unfavorable (from fill-ins only)

Base (fill-ins): N = 569

## "Why?" categories (share within each opinion bucket)

Reason category	Favorable (Net)	Unfavorable (Net)	Neutral	Not familiar
Other / unclear	66.7%	41.4%	73.5%	85.3%
Elon / leadership	9.4%	46.5%	7.2%	2.9%
Technology / innovation	10.9%	1.6%	0.0%	0.0%
Build quality	8.0%	0.6%	0.0%	0.0%
Price / affordability	1.4%	6.4%	8.4%	5.9%
Safety	0.7%	2.2%	1.2%	0.0%
Service experience	0.7%	0.3%	2.4%	0.0%

### WHAT IS YOUR OVERALL OPINION OF THE TESLA BRAND?

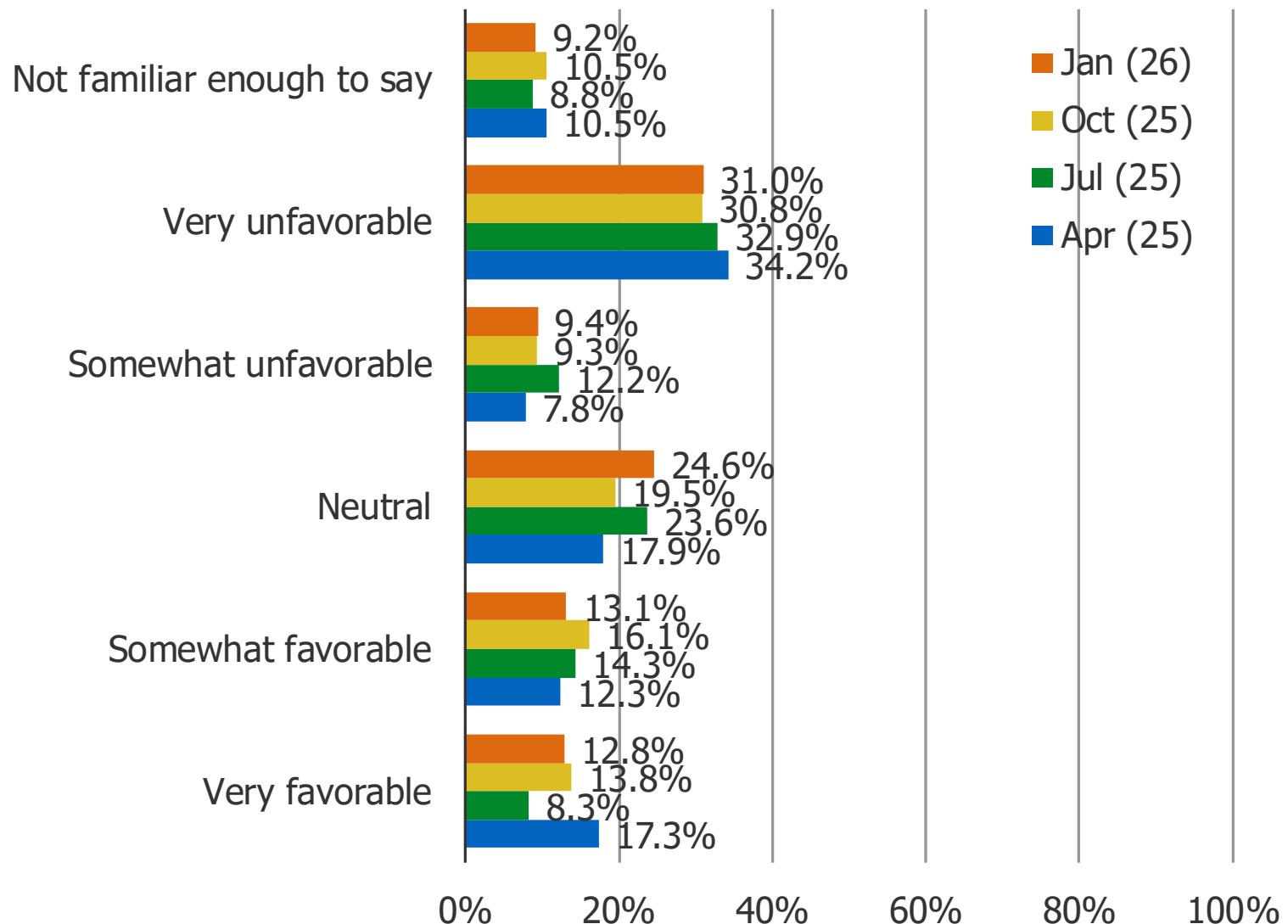
Posed to all respondents.

#### Key insights (data-only)

- Tesla brand sentiment is **net negative** in the most recent quarters shown (Net Favorability: -11 → -4 → -8 from 2025 Q3 → 2026 Q1).
- Over the full dataset window, **net favorability does not show a consistent upward/downward trend** ( $R^2$  low, p-value not significant).
- The "why" fill-ins show a very strong split:
  - Among **Unfavorable** respondents, nearly **half explicitly cite Elon/leadership** (46.5% of unfavorable fill-ins).
  - Among **Favorable** respondents, the top named positives are **technology/innovation** (10.9%) and **Elon/leadership** (9.4%), plus some mention of **build quality** (8.0%).
- Neutral and "Not familiar" fill-ins are overwhelmingly vague, with "Other/unclear" ~74–85%, meaning these groups typically do not explain their view in detail. 

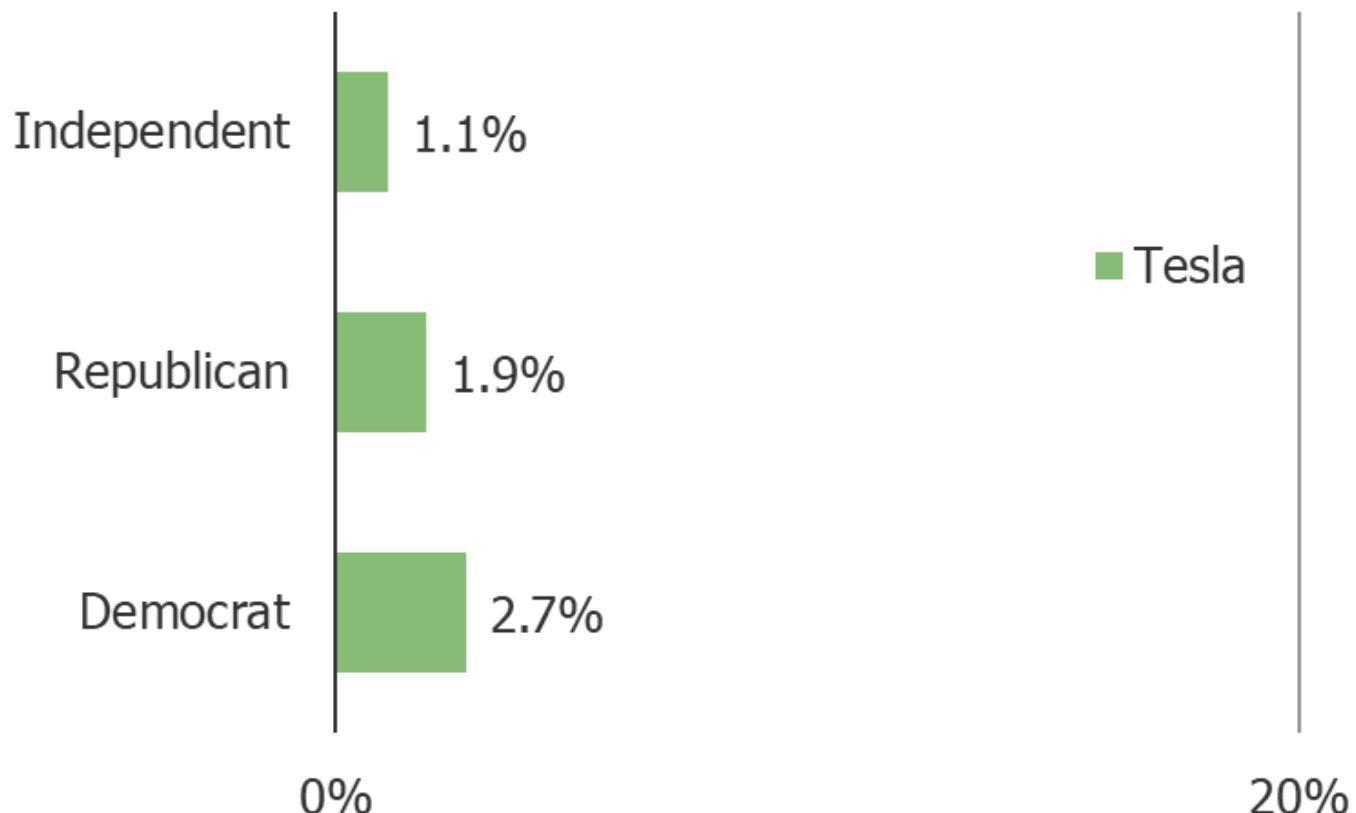
## WHAT IS YOUR OVERALL OPINION OF ELON MUSK?

Posed to all respondents.



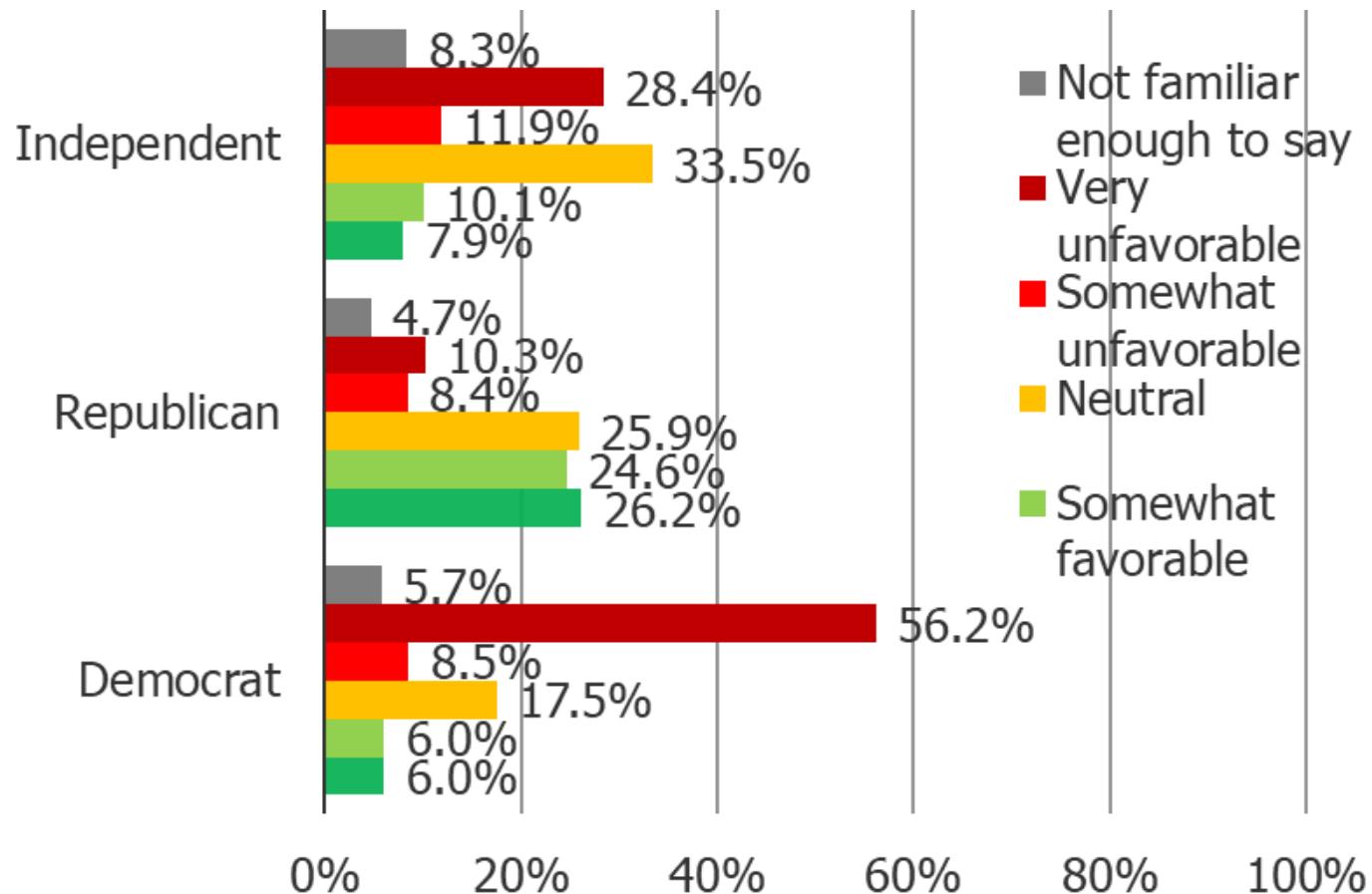
TESLA OWNERS: WHICH OF THE FOLLOWING DESCRIBES YOUR POLITICAL AFFILIATION?

Posed to all respondents, cross-tabbed by political affiliation.



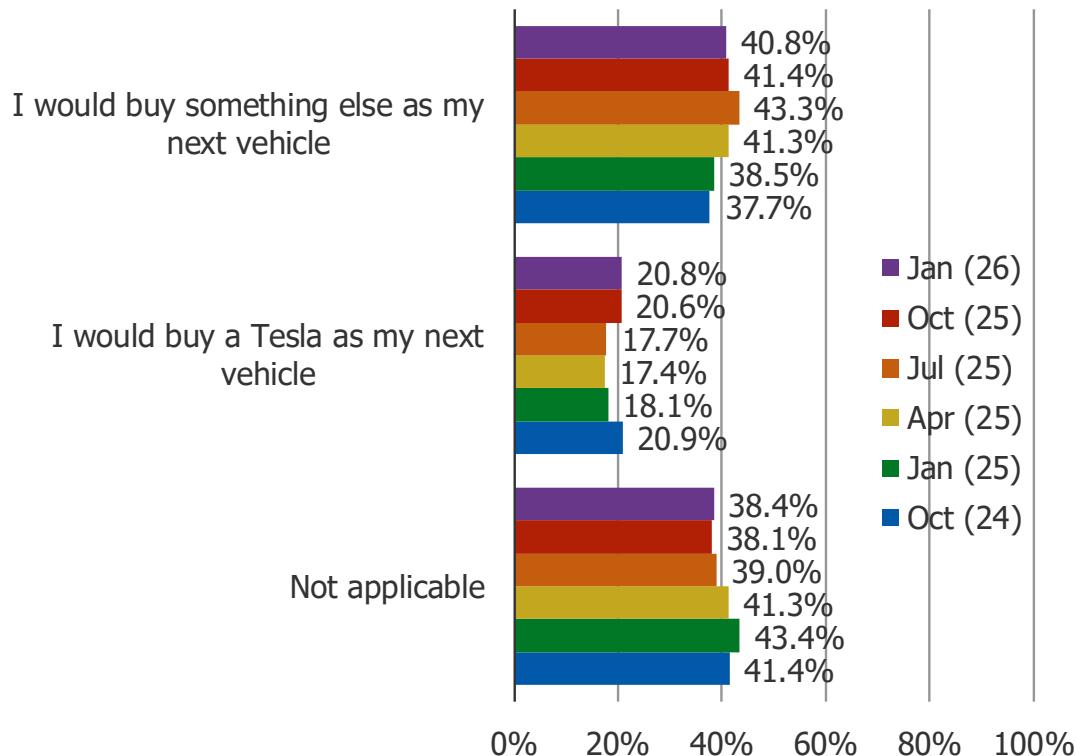
## WHAT IS YOUR OVERALL OPINION OF ELON MUSK?

Posed to all respondents, cross-tabbed by political affiliation.



IF YOU LEARNED TESLA PERFECTED AUTONOMOUS DRIVING TO THE POINT WHERE IT WAS SAFER THAN HUMANS DRIVING AND THEY WERE THE ONLY COMPANY WHO COULD OFFER SUCH A CAPABILITY... WHICH OF THE FOLLOWING WOULD BEST DESCRIBE YOU...

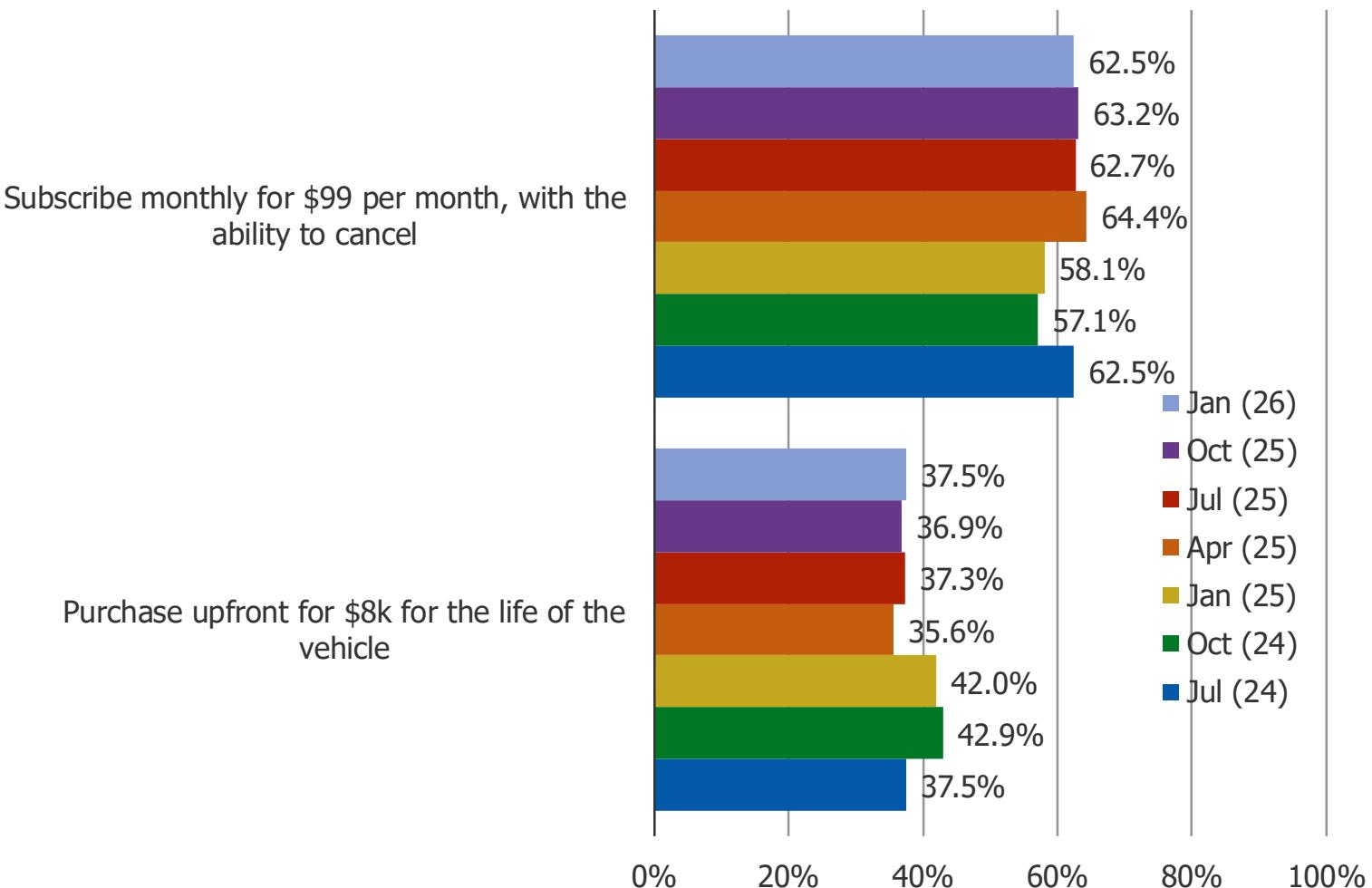
Posed to all respondents.



Why?

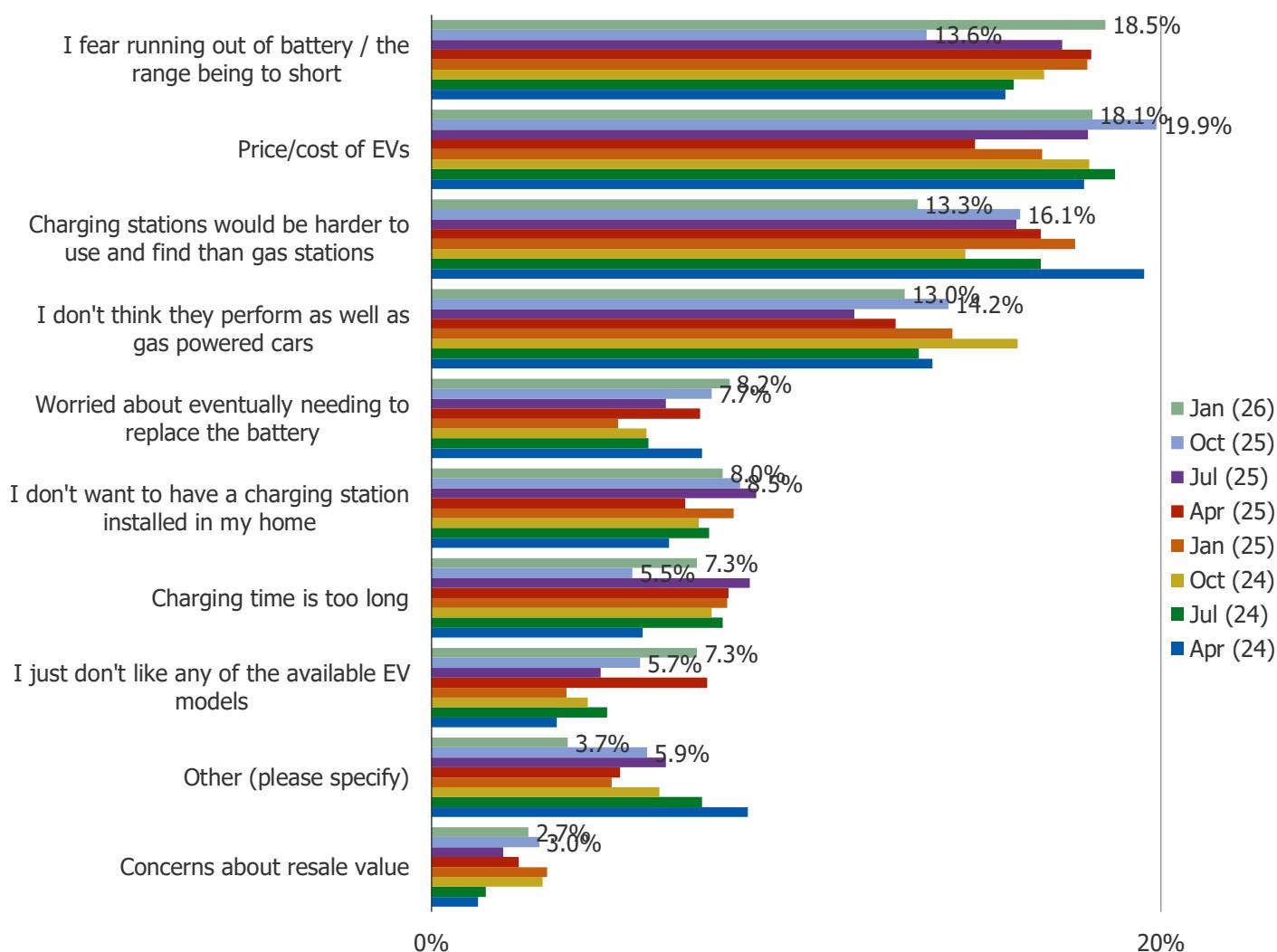
IF YOU HAD THE OPTION TO ADD FULL SELF DRIVING CAPABILITIES TO YOUR VEHICLE, WHICH WOULD YOU FIND MORE ATTRACTIVE?

Posed to all respondents.



## WHAT IS THE PRIMARY REASON FOR WHY YOU ARE NOT MORE LIKELY TO CHOOSE AN ELECTRIC VEHICLE?

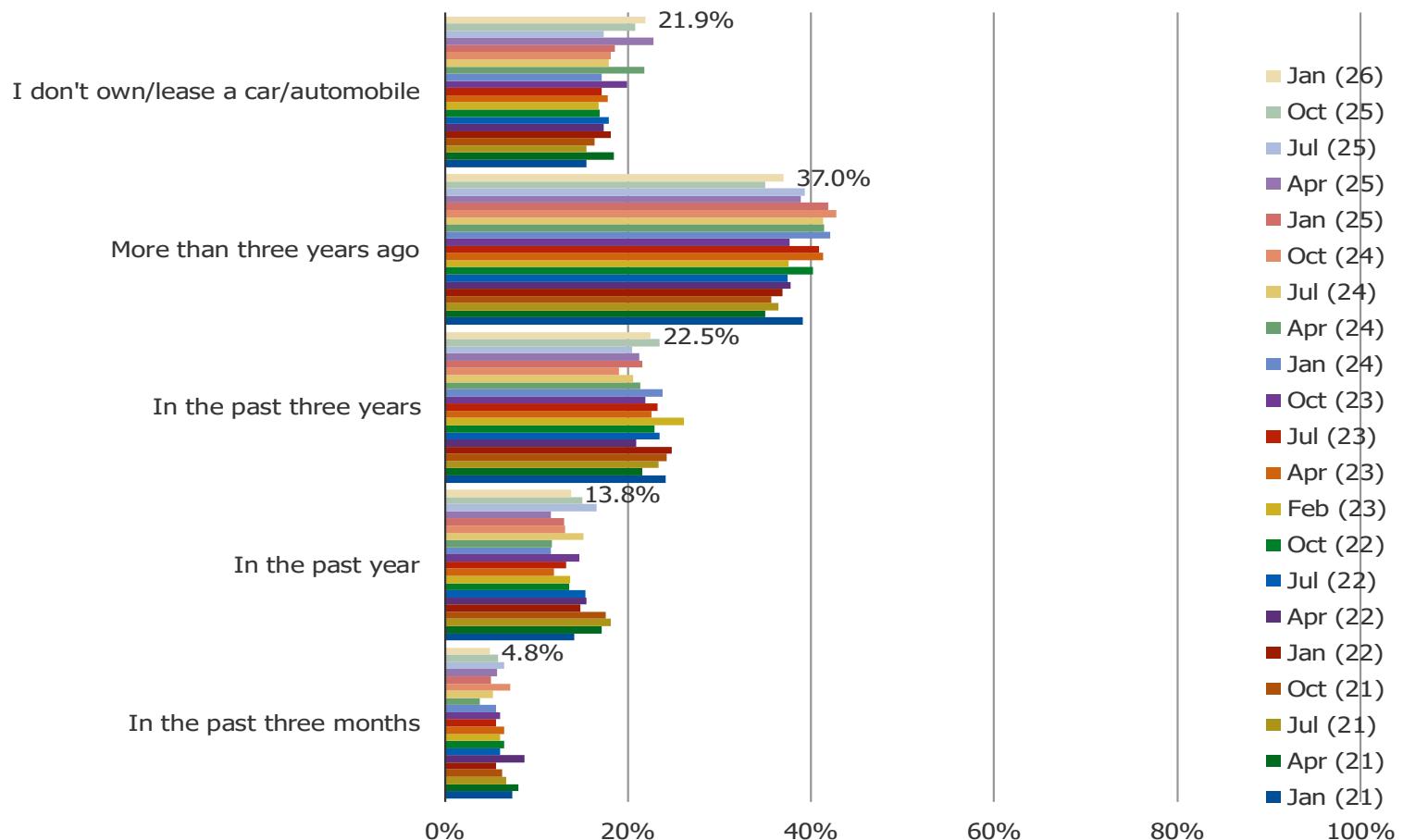
Posed to all respondents who are likely to purchase a gas vehicle for their next vehicle (N = 508)



## AUTOS AND EVS

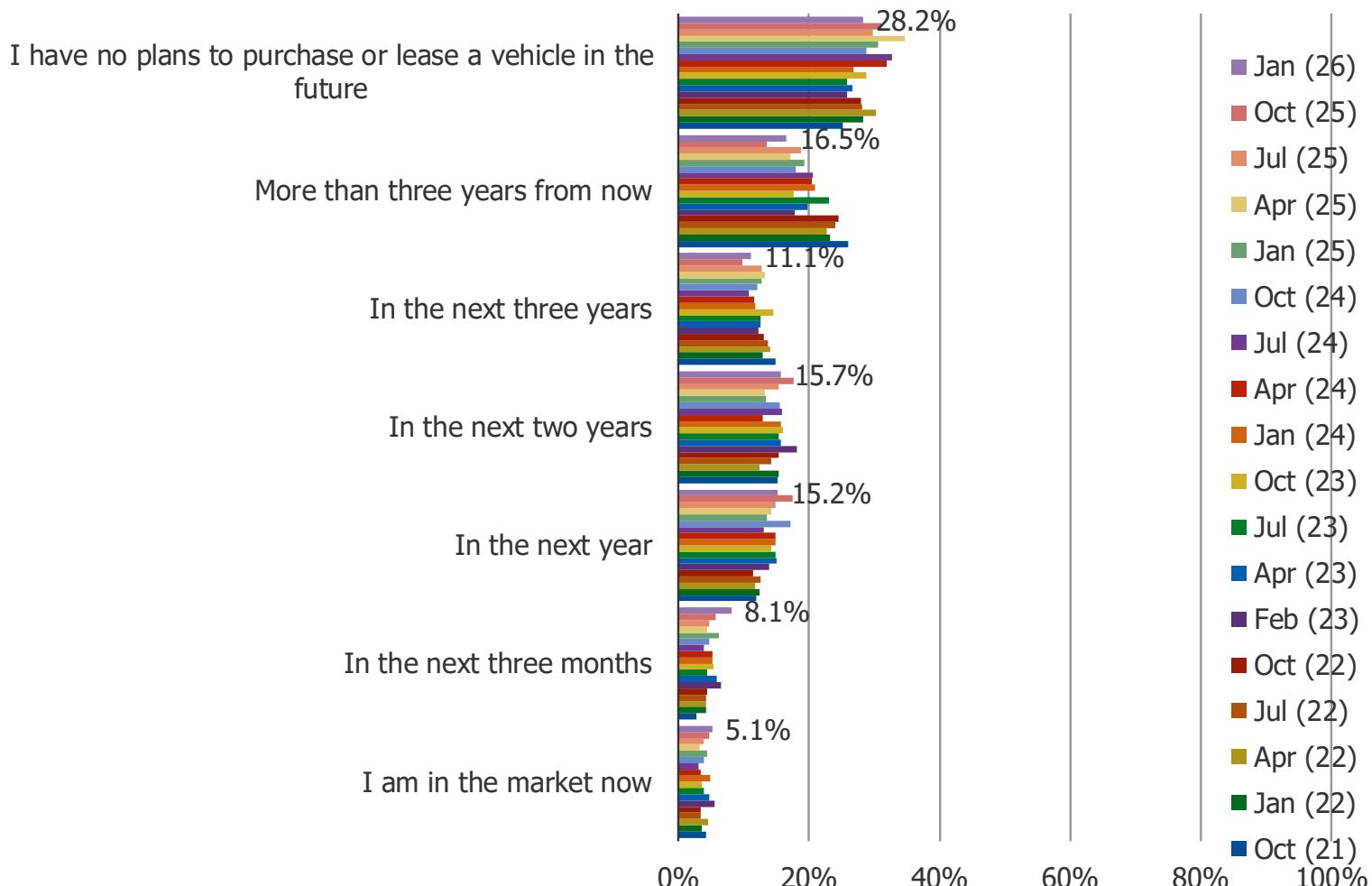
## WHEN IS THE LAST TIME YOU PURCHASED OR LEASED A CAR/AUTOMOBILE?

Posed to all respondents.



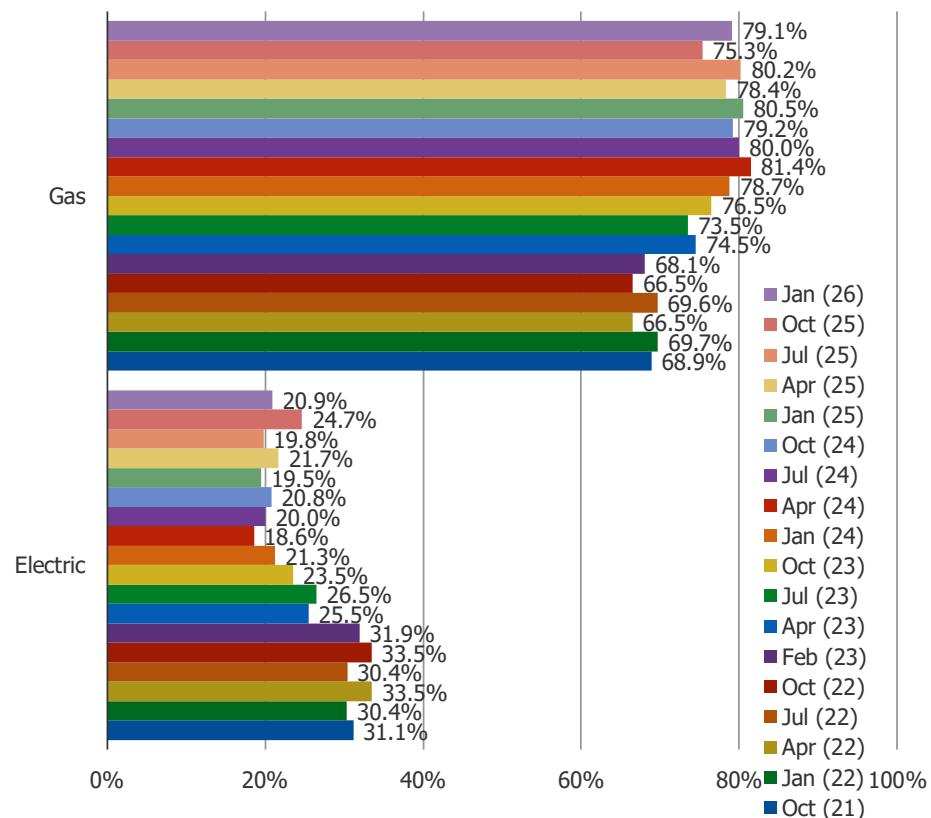
## WHEN ARE YOU MOST LIKELY TO PURCHASE OR LEASE A VEHICLE NEXT?

Posed to all respondents.

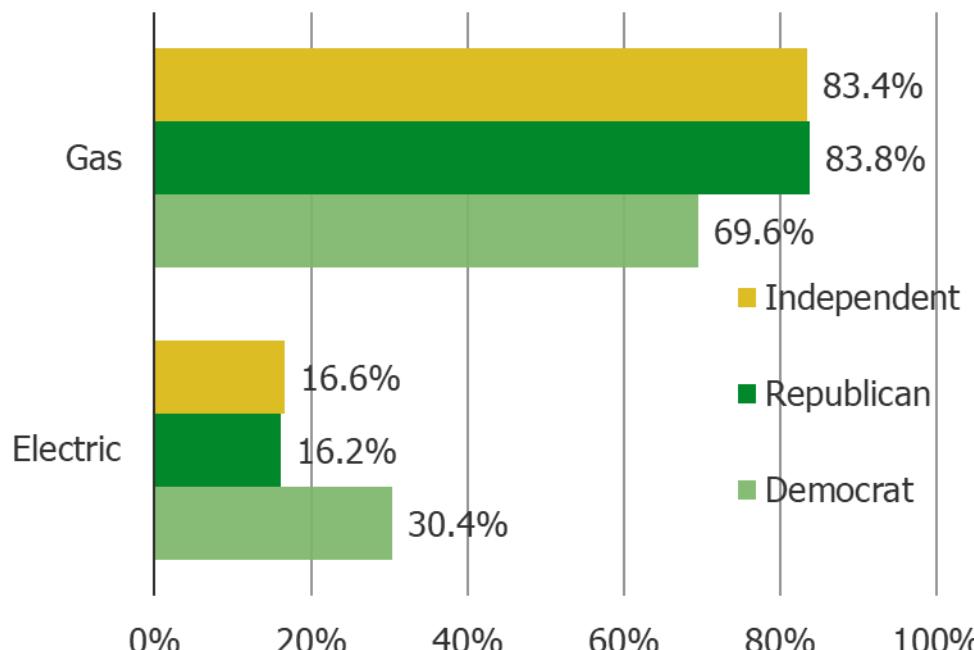


THINKING ABOUT THE NEXT VEHICLE YOU WILL PURCHASE OR LEASE, IS IT MORE LIKELY TO BE:

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

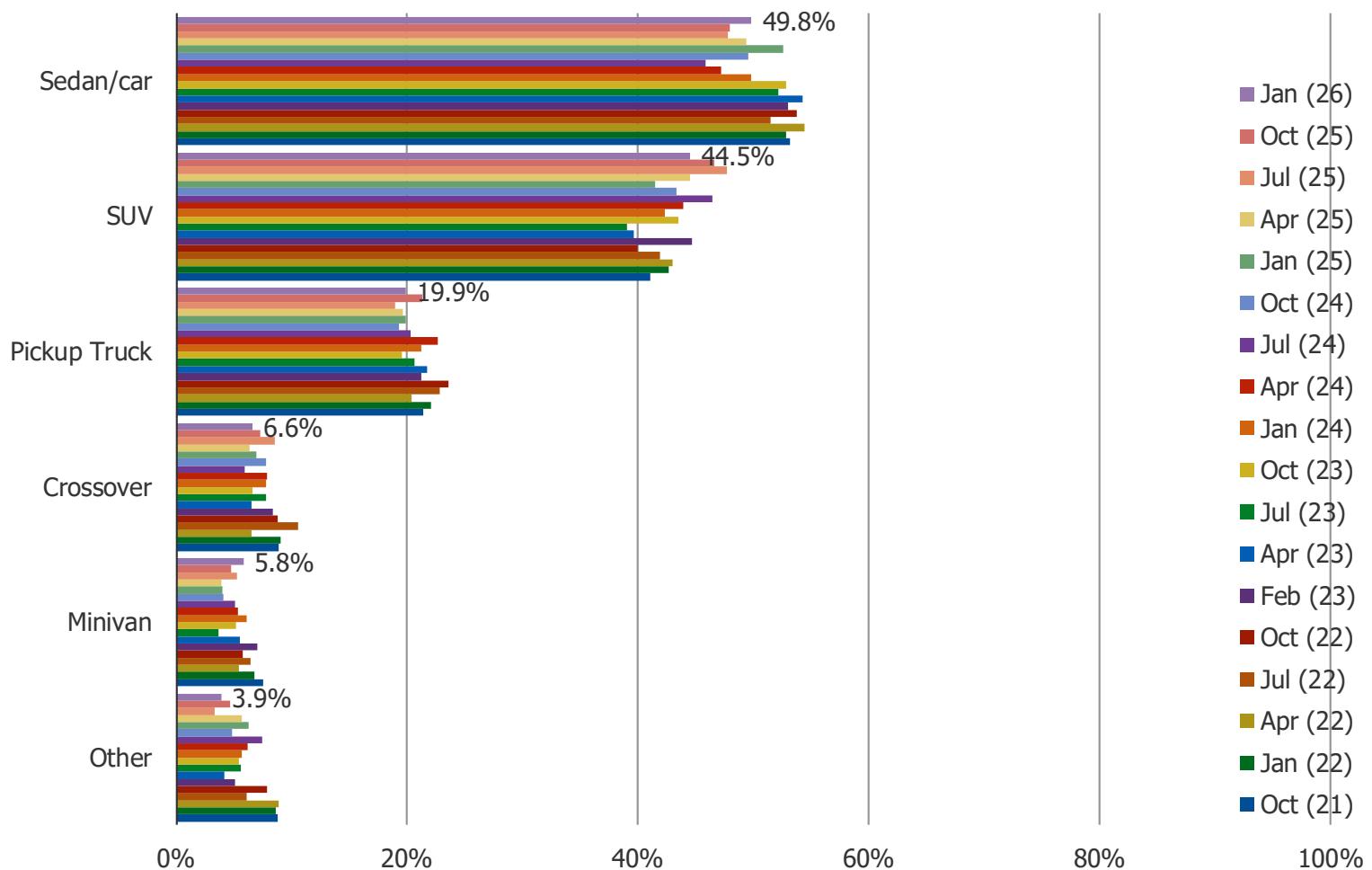


Cross-tabbing the data above...



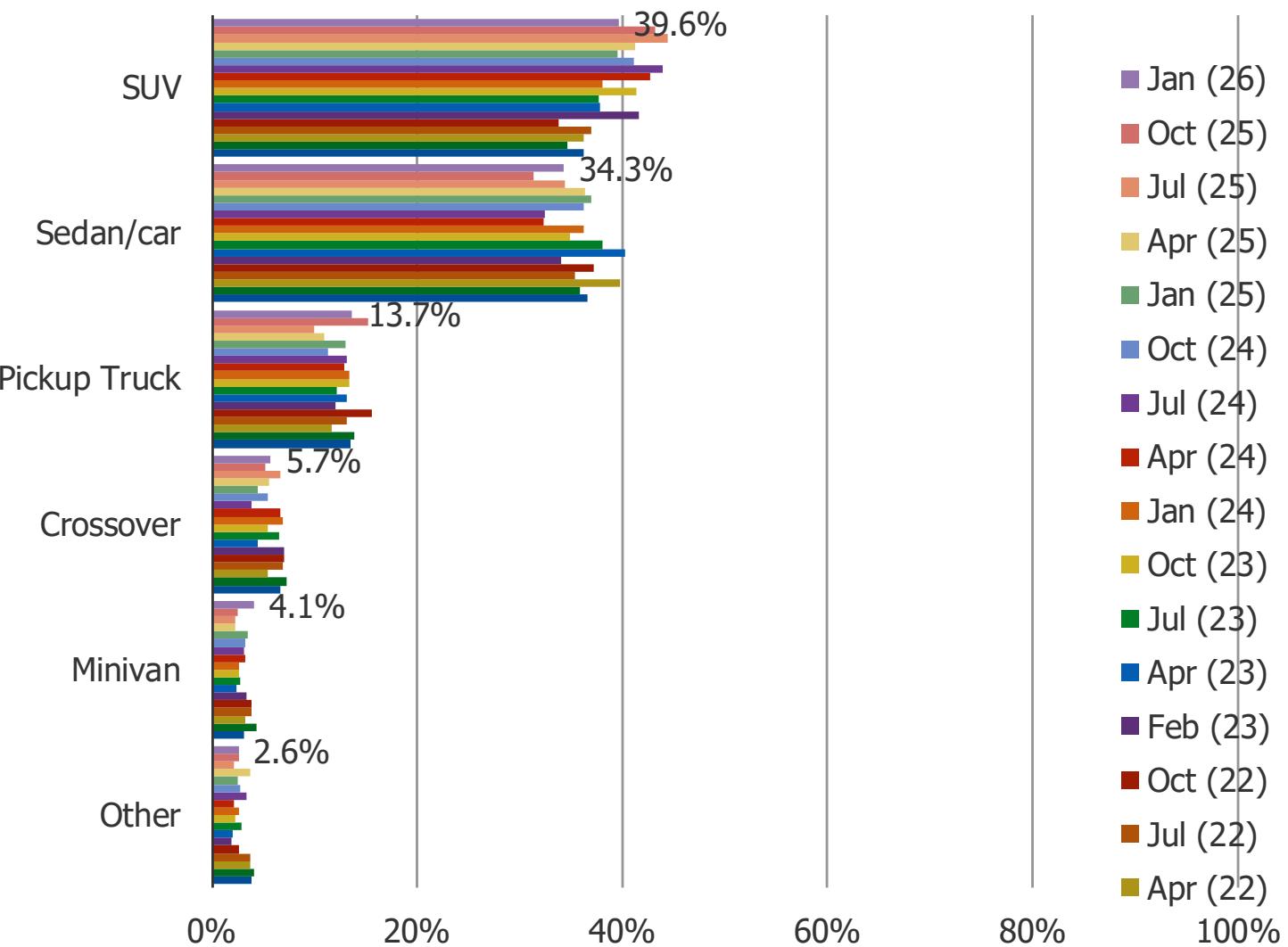
WHICH OF THE FOLLOWING DO YOU CURRENTLY OWN IN YOUR HOUSEHOLD? (SELECT ALL THAT APPLY)

Posed to all respondents



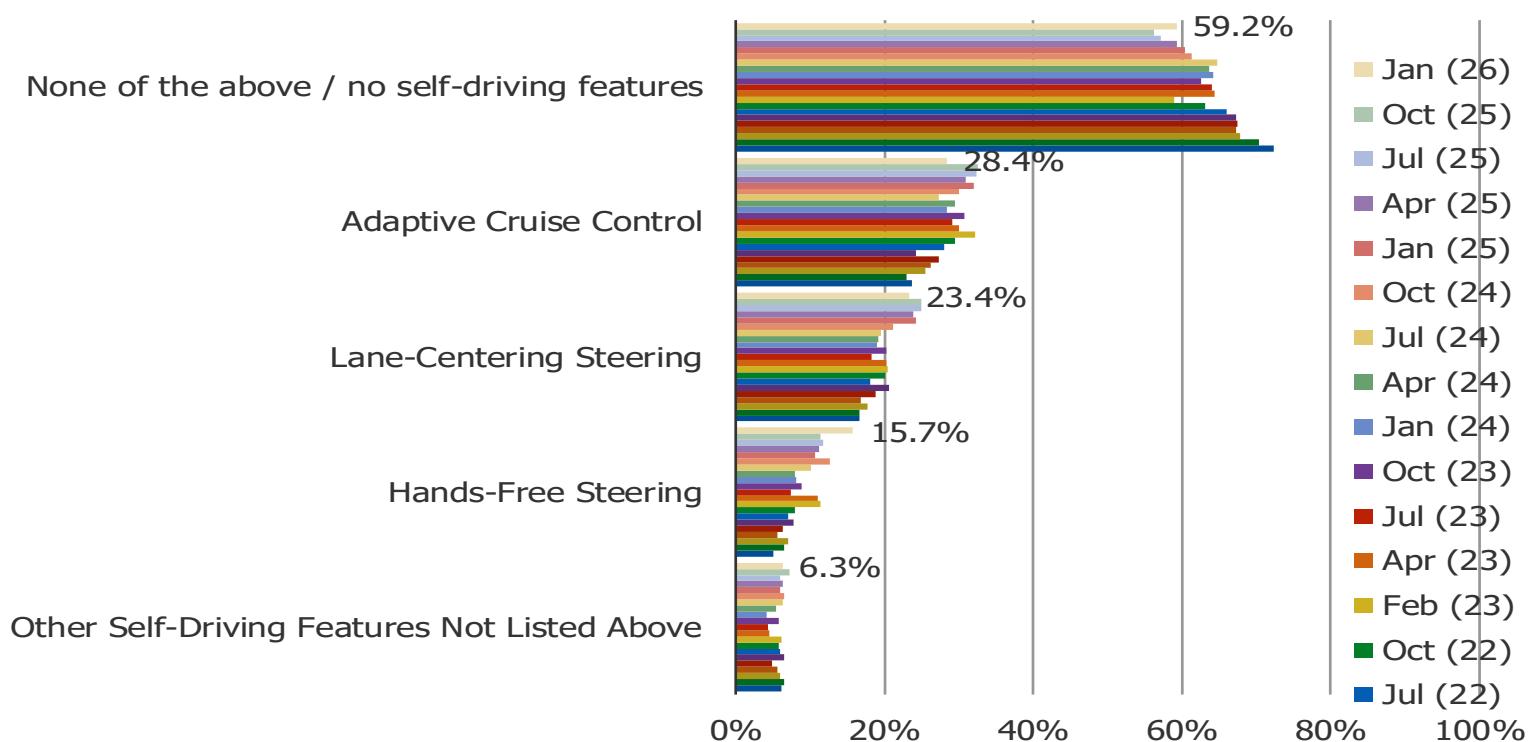
## WHICH IS YOUR MOST PREFERRED TYPE OF VEHICLE TO OWN/LEASE?

Posed to all respondents



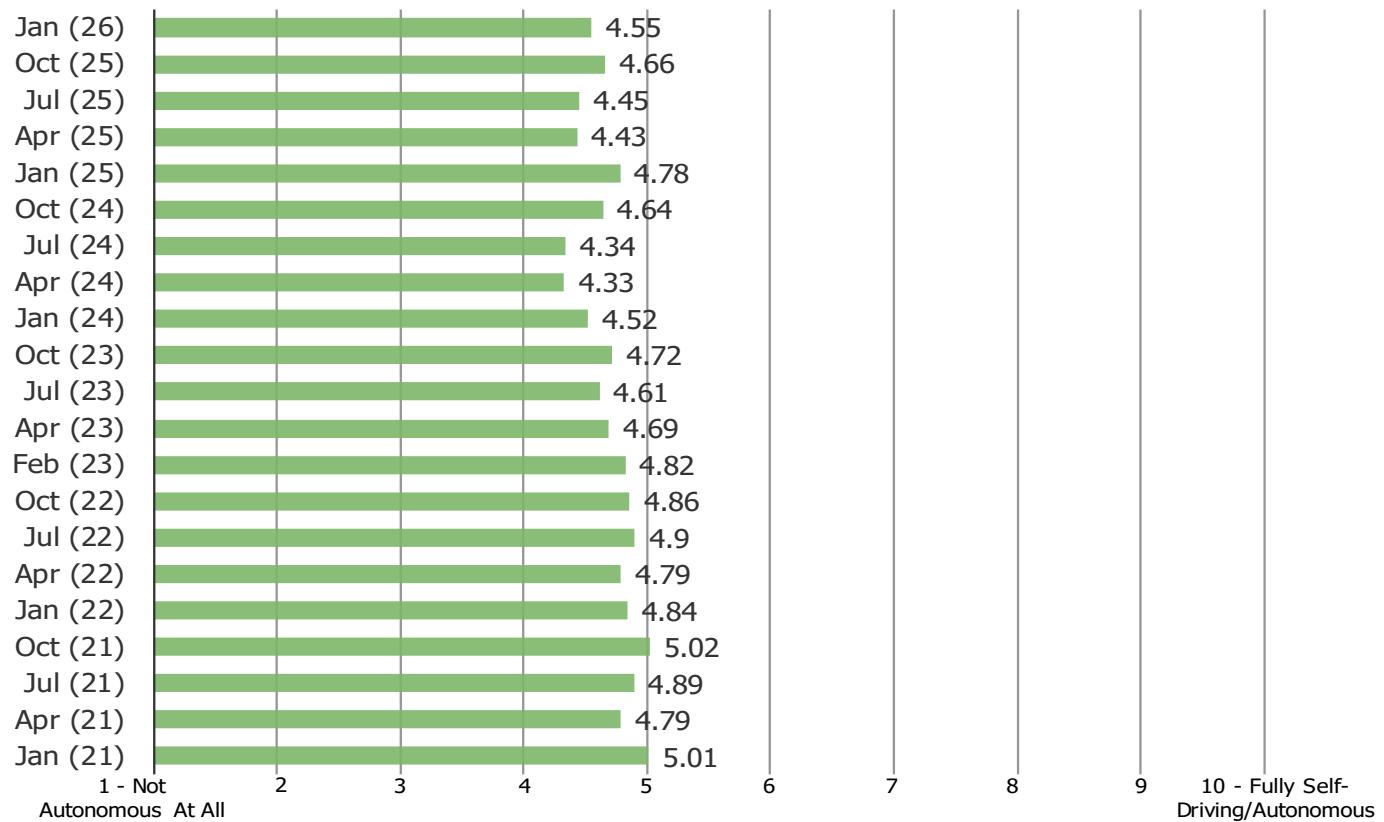
## DO YOU CURRENTLY OWN/LEASE ONE OR MORE AUTOS THAT HAVE THE FOLLOWING FEATURES?

Posed to respondents who own/lease a car.



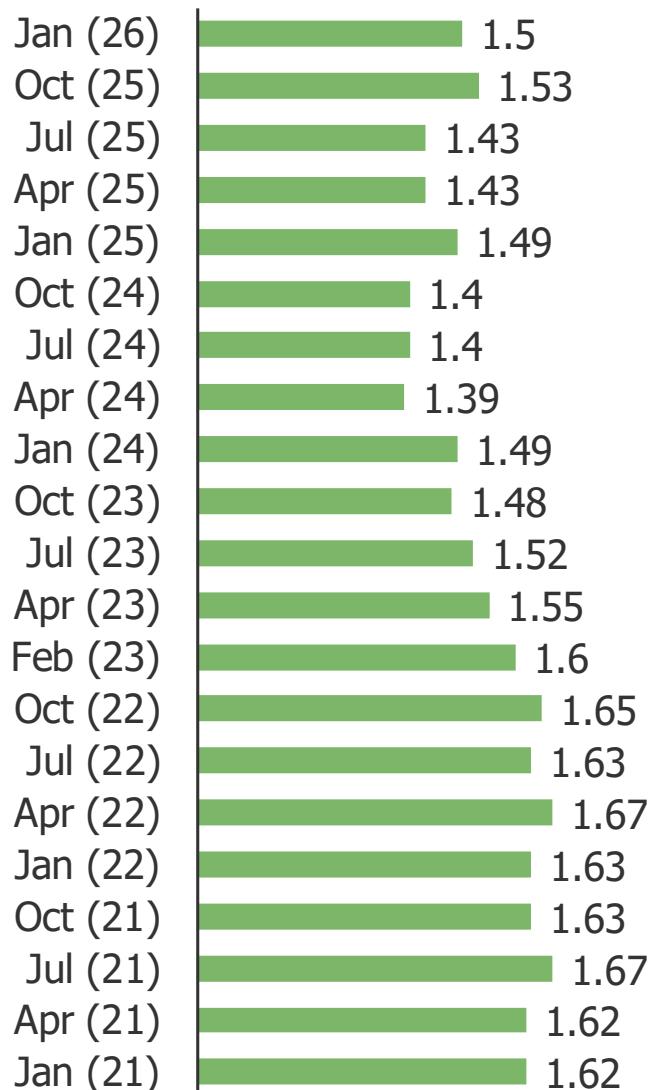
## IN YOUR OPINION, HOW AUTONOMOUS WOULD THE IDEAL CAR/AUTOMOBILE BE?

Posed to respondents who own/lease a car.



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.



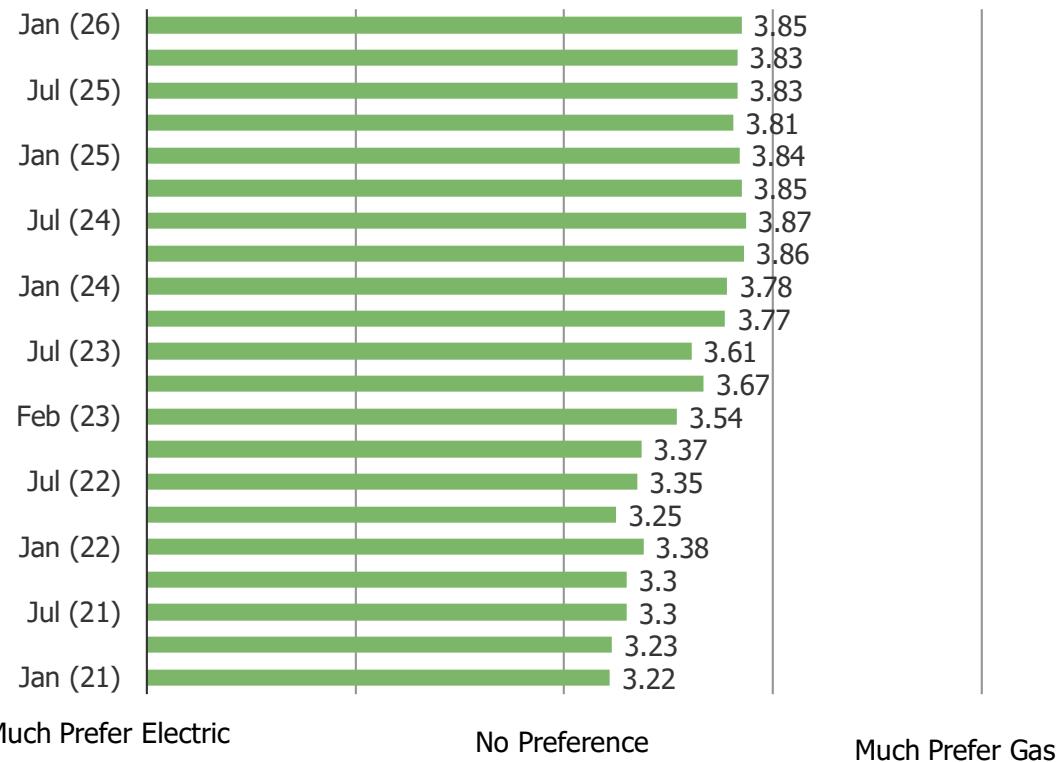
Not At All Important

Somewhat Important

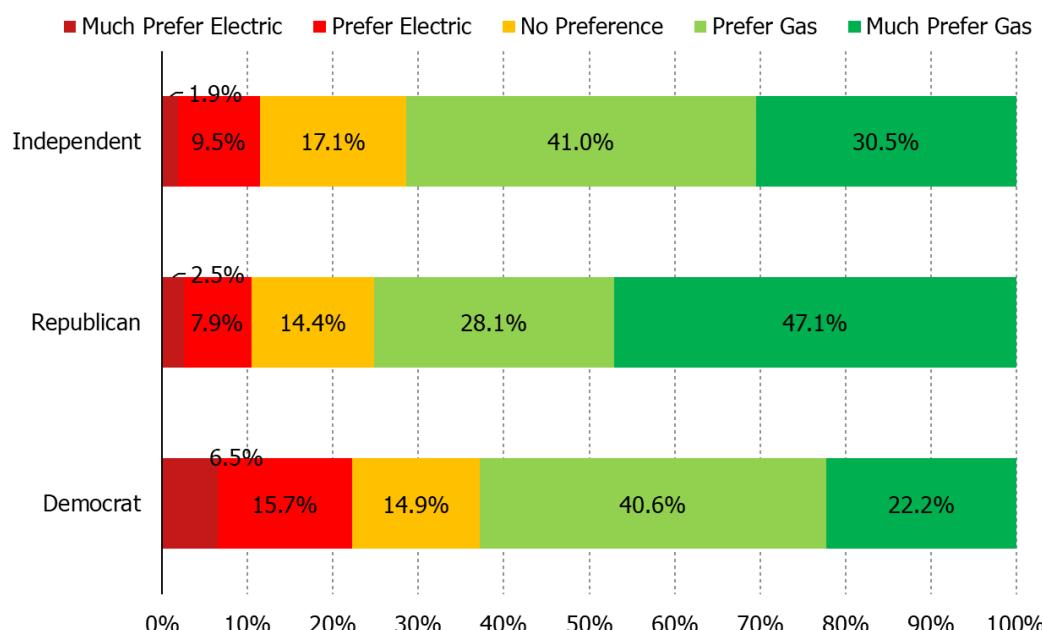
Very Important

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

Posed to respondents who own/lease a car.

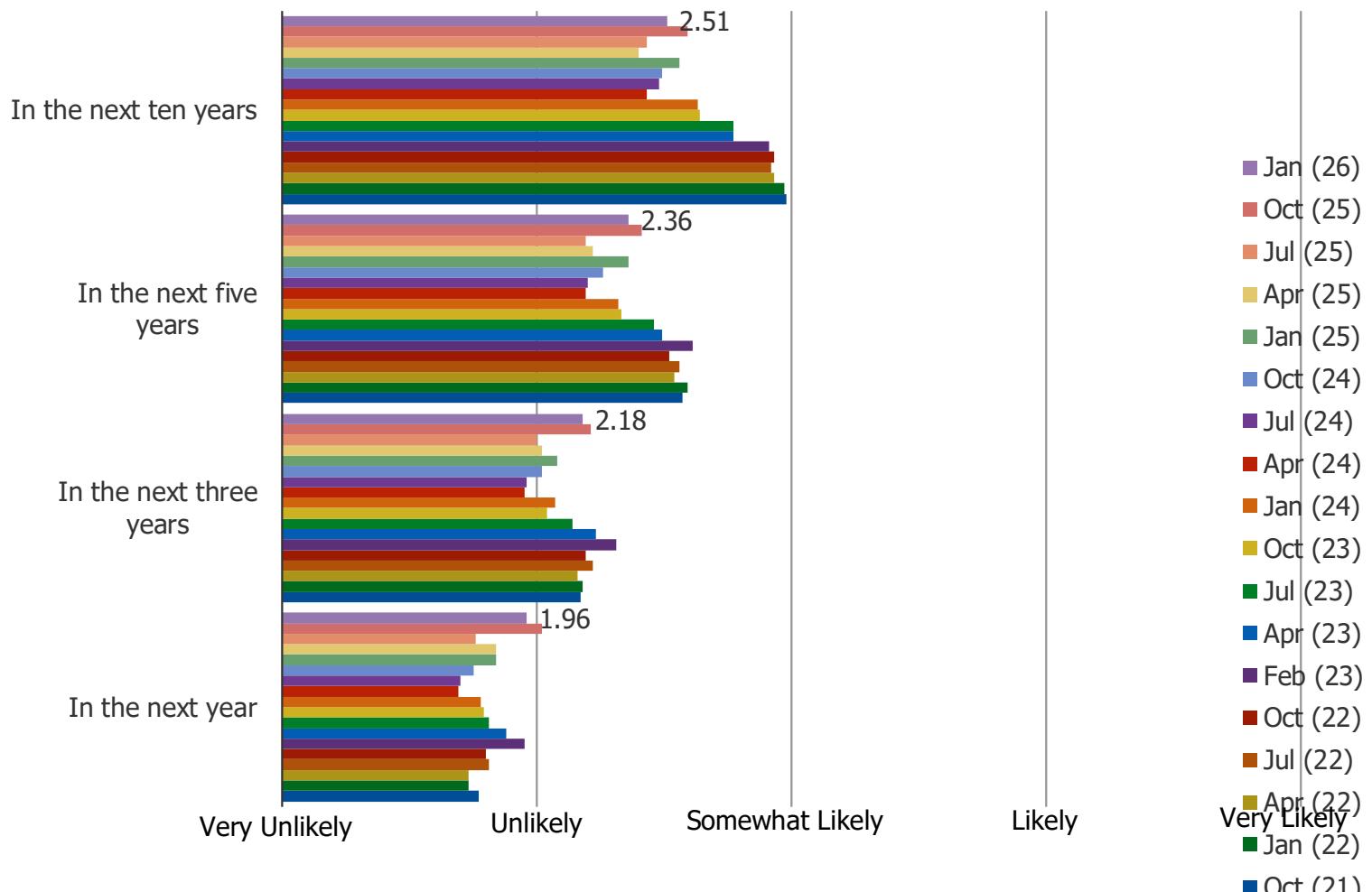


Cross-tabbing the data above...



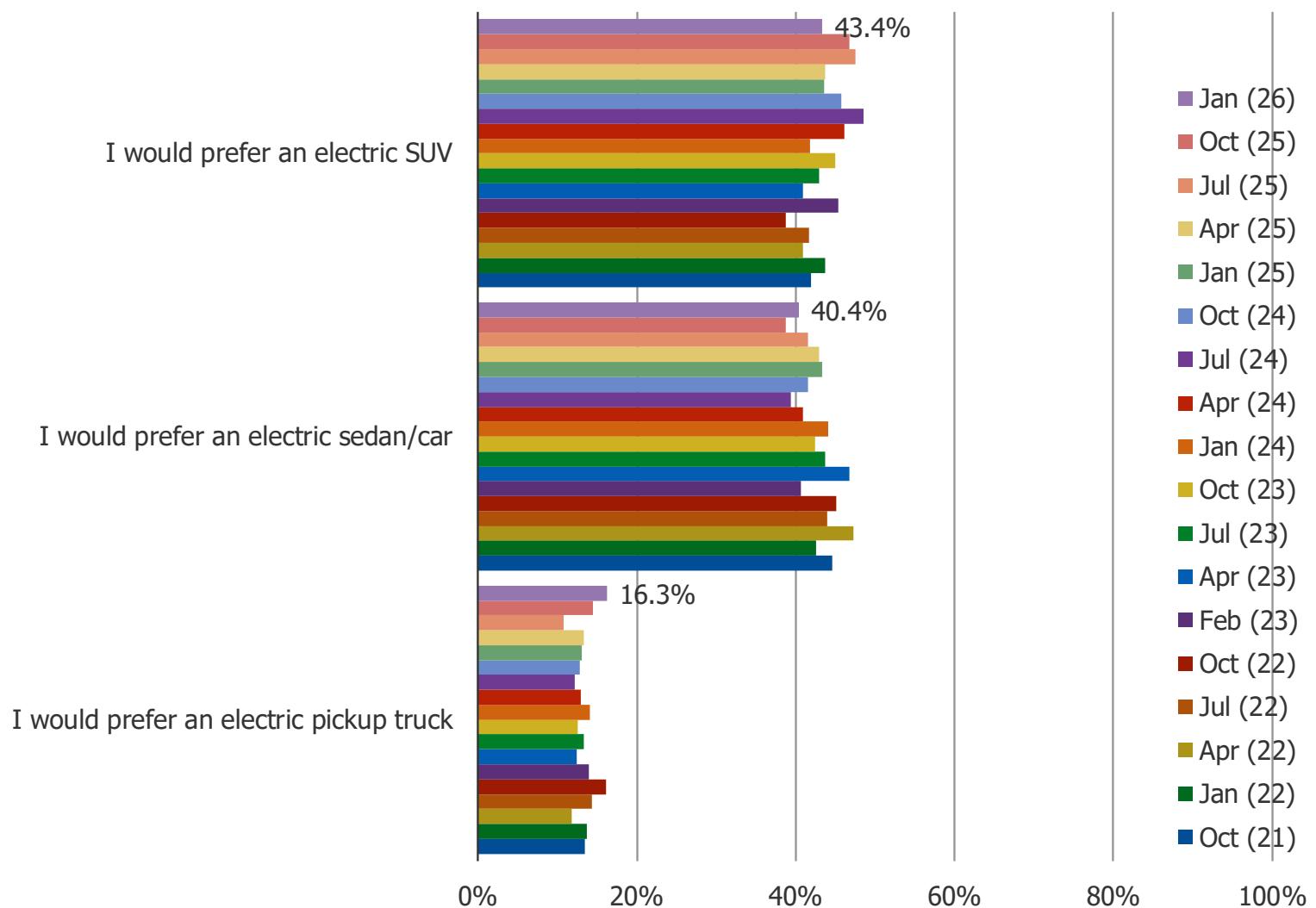
## HOW LIKELY ARE YOU OWN OR LEASE AN ELECTRIC VEHICLE...

Posed to respondents who own/lease a car.



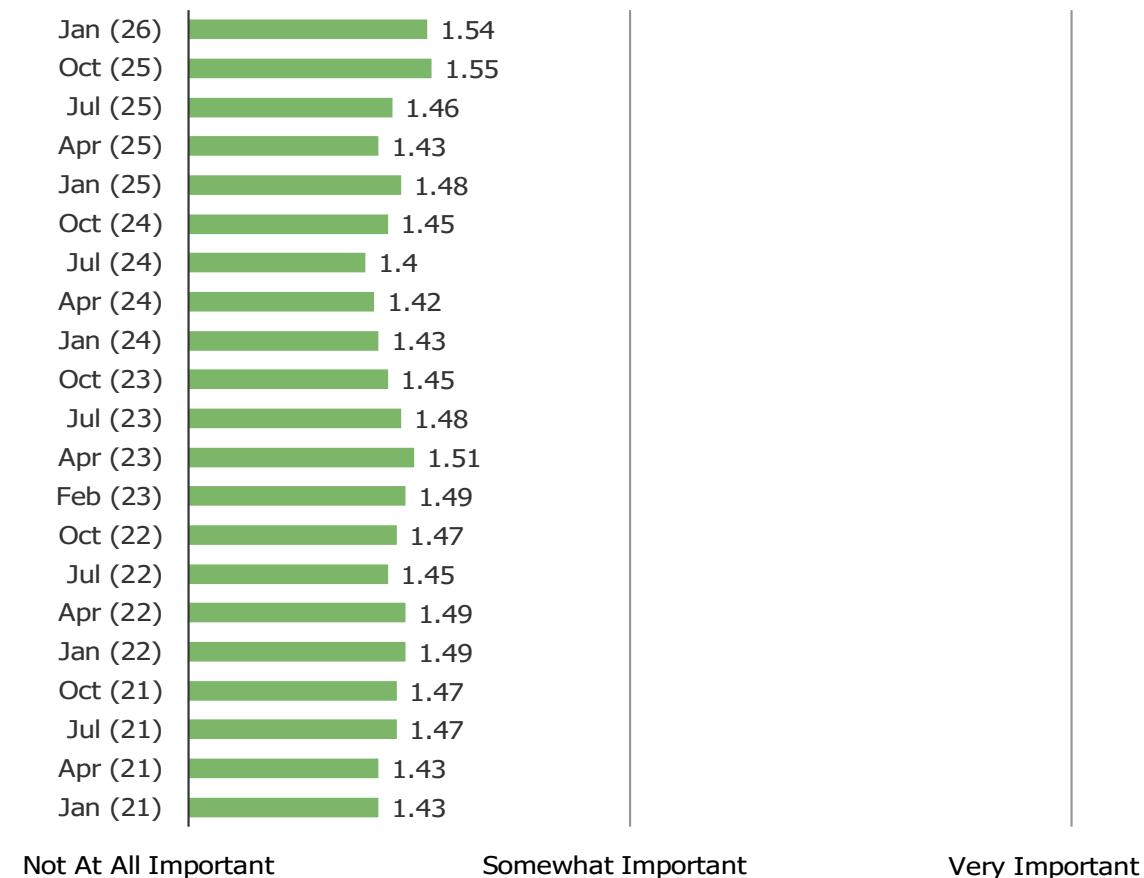
IF YOU WERE TO PURCHASE OR LEASE AN ELECTRIC VEHICLE, WOULD YOU PREFER...

Posed to respondents who own/lease a car.



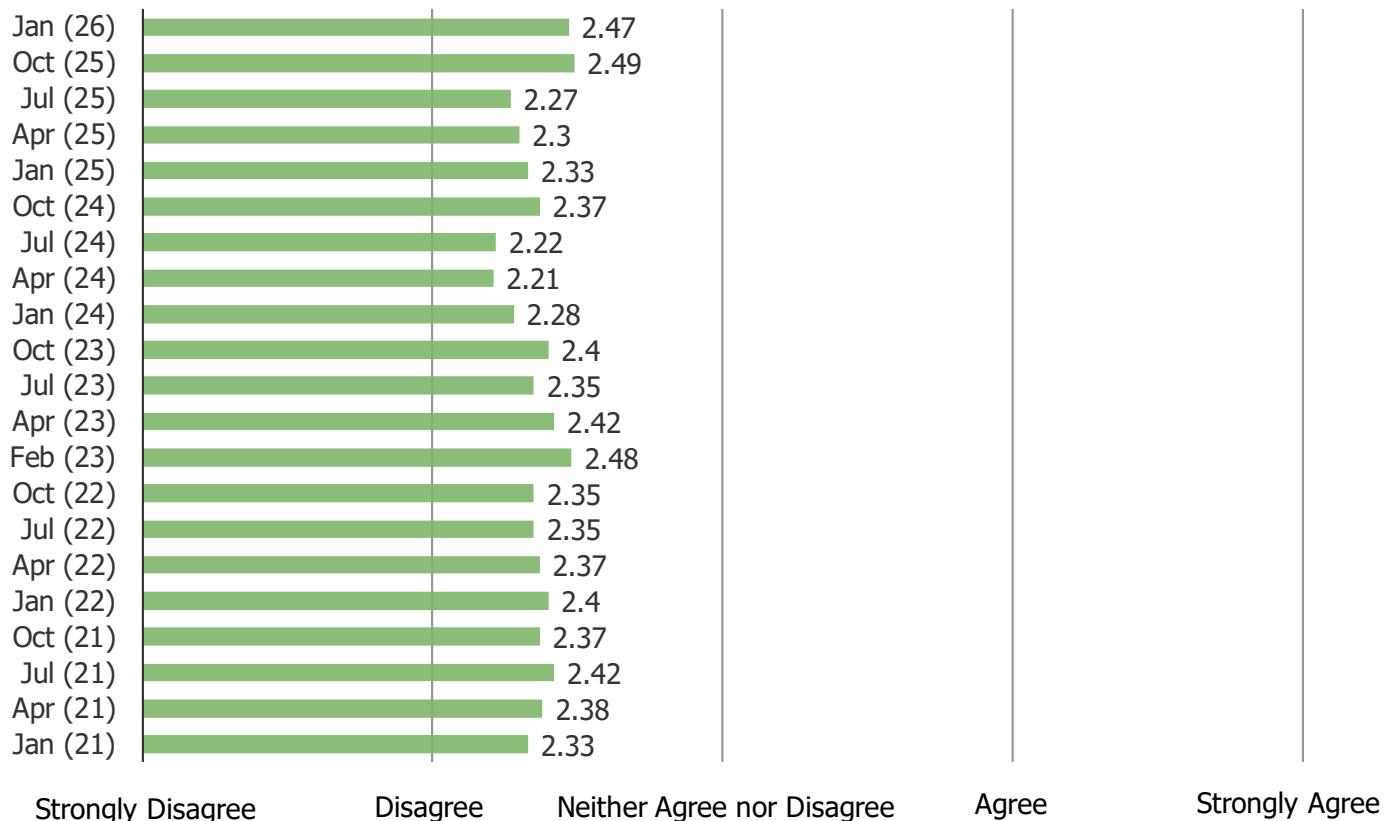
IF YOU WERE LOOKING TO GET A NEW CAR, HOW IMPORTANT WOULD IT BE FOR THE CAR TO HAVE SELF-DRIVING OR AUTONOMOUS DRIVING FEATURES?

Posed to respondents who own/lease a car.



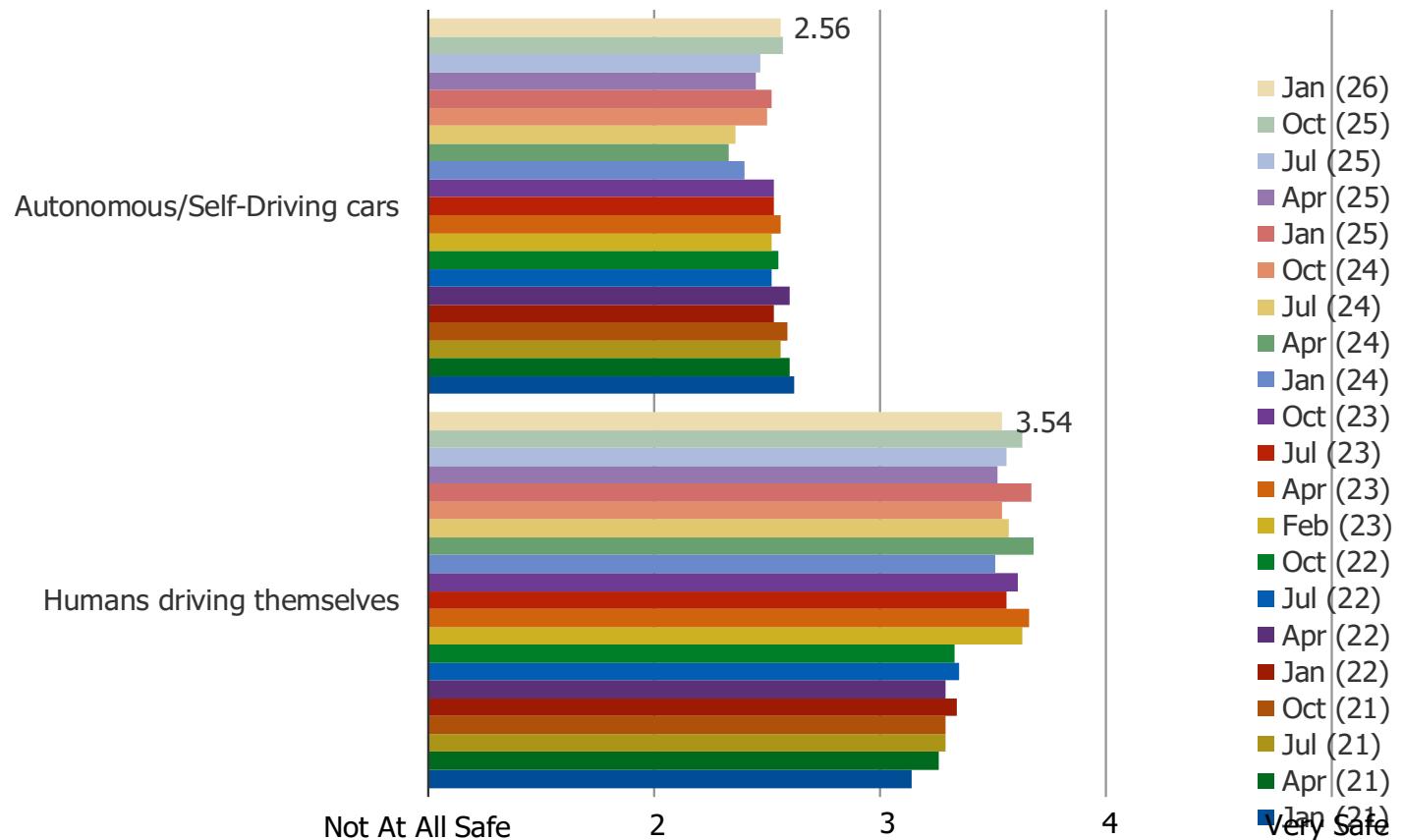
TO WHAT EXTENT DO YOU AGREE: "IT WOULD BE WORTH IT TO SPEND MORE ON A CAR/AUTO IN ORDER FOR IT TO HAVE SELF-DRIVING/AUTONOMOUS CAPABILITIES"

Posed to respondents who own/lease a car.



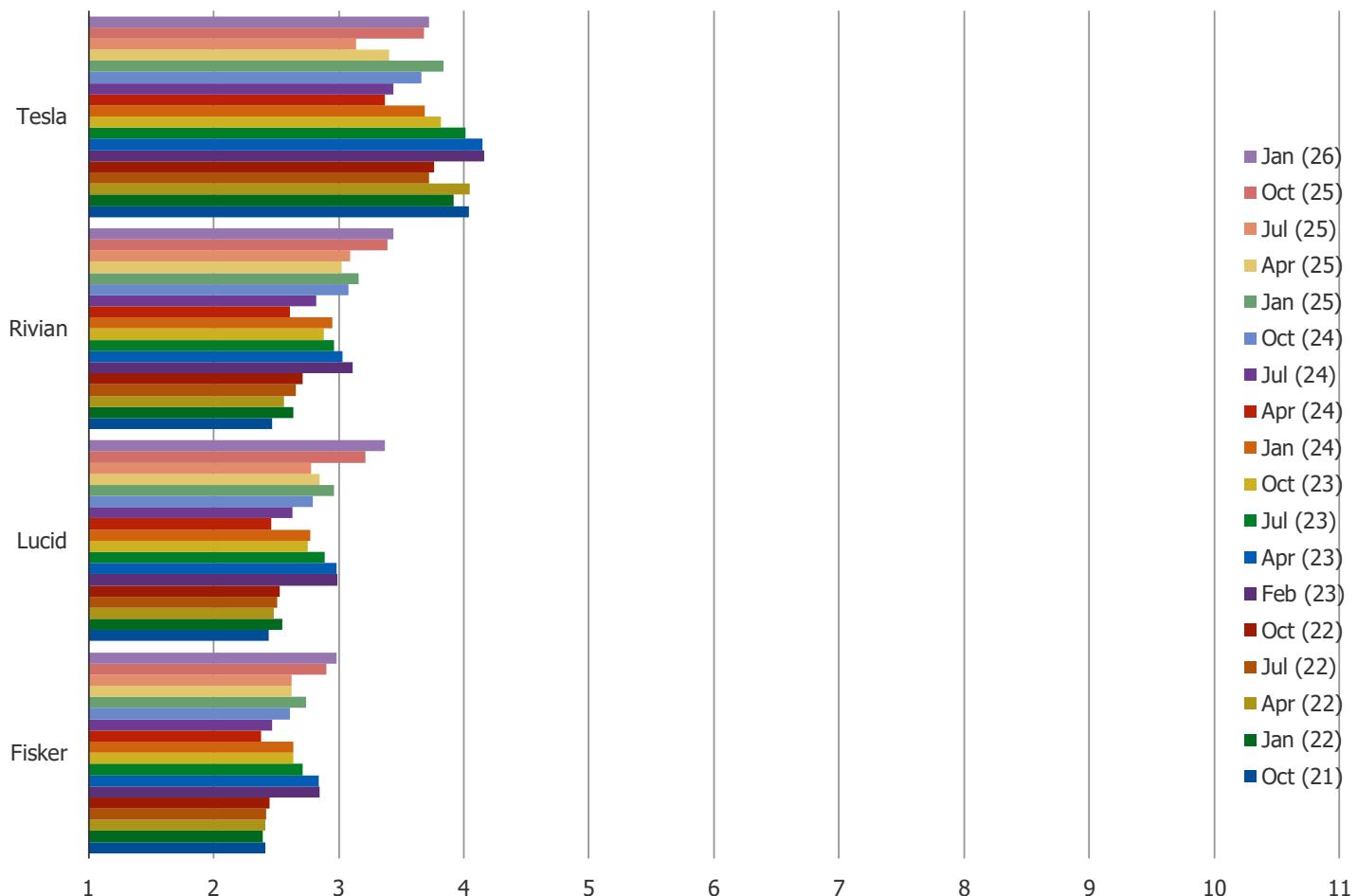
## HOW WOULD YOU RATE HOW SAFE THE FOLLOWING ARE?

Posed to respondents who own/lease a car.



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

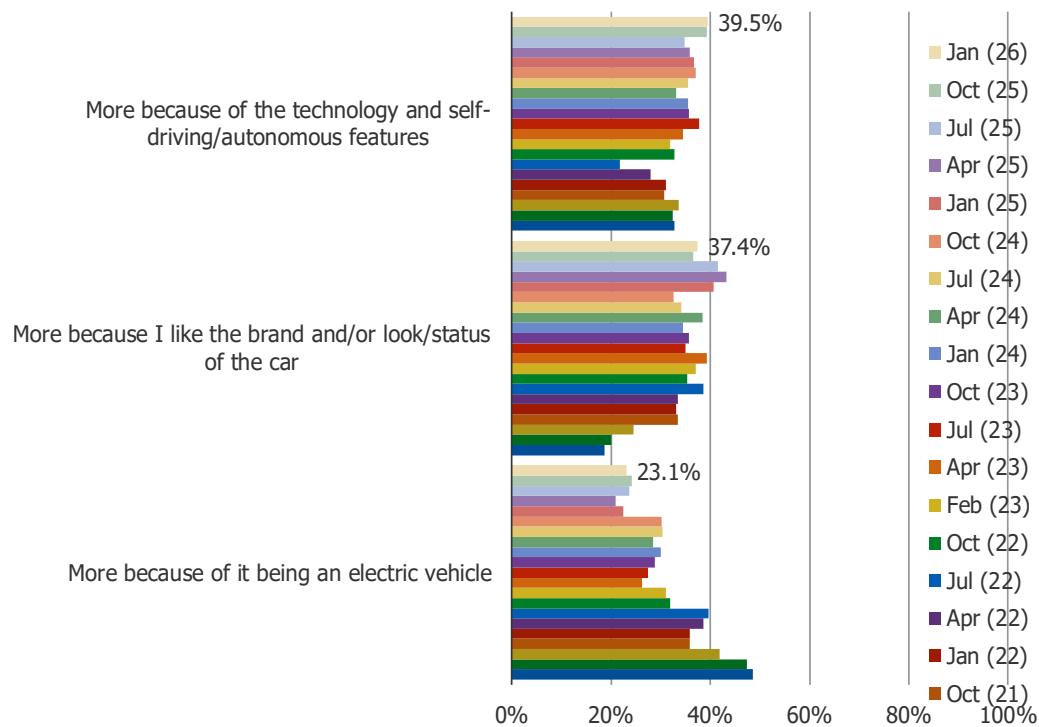
Posed to respondents who own/lease a car.



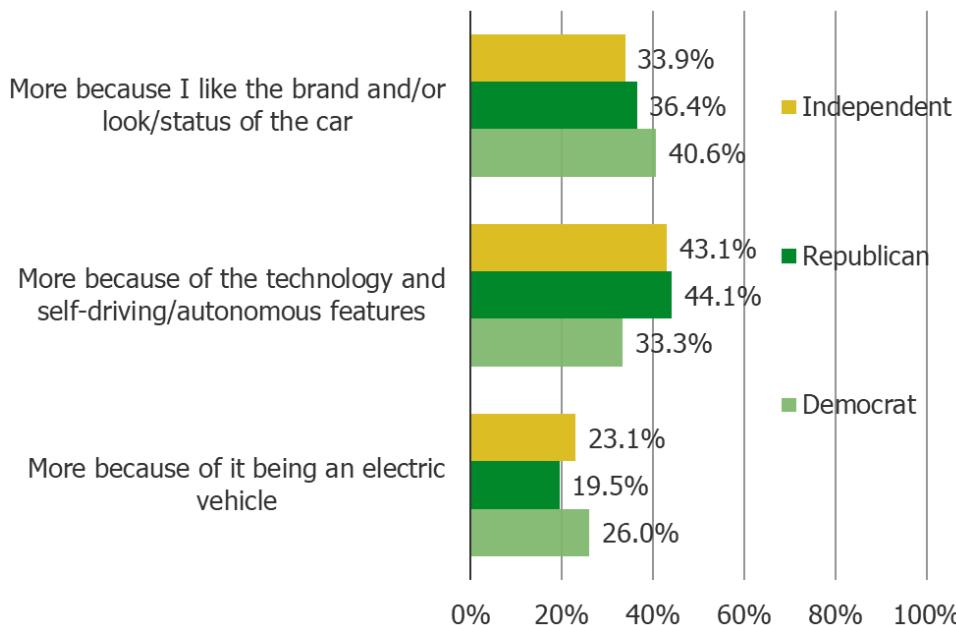
1- 11 scale in which 1 = no interest and 11 = very strong interest.

## 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.

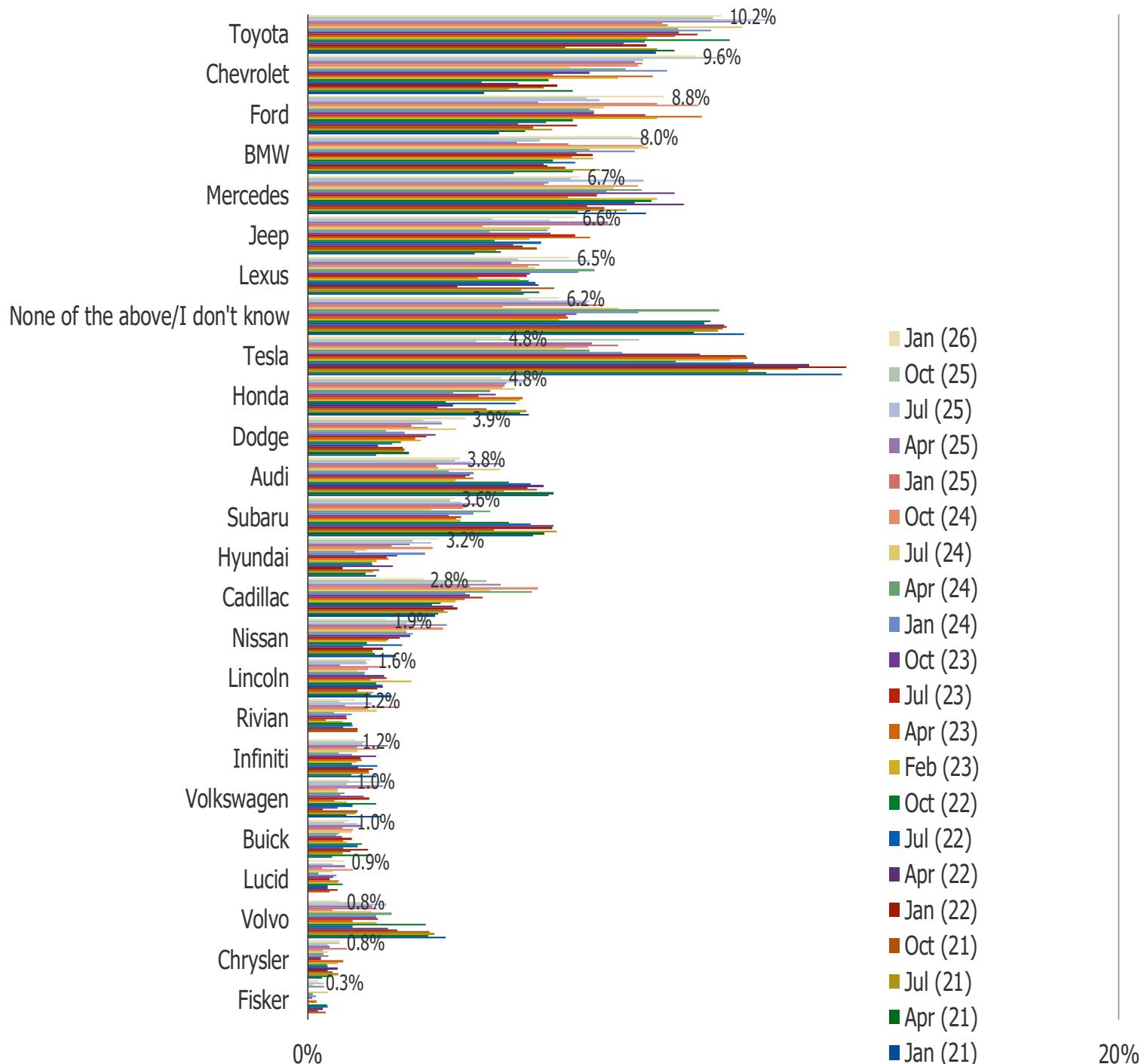


Cross-tabbing the above data...



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

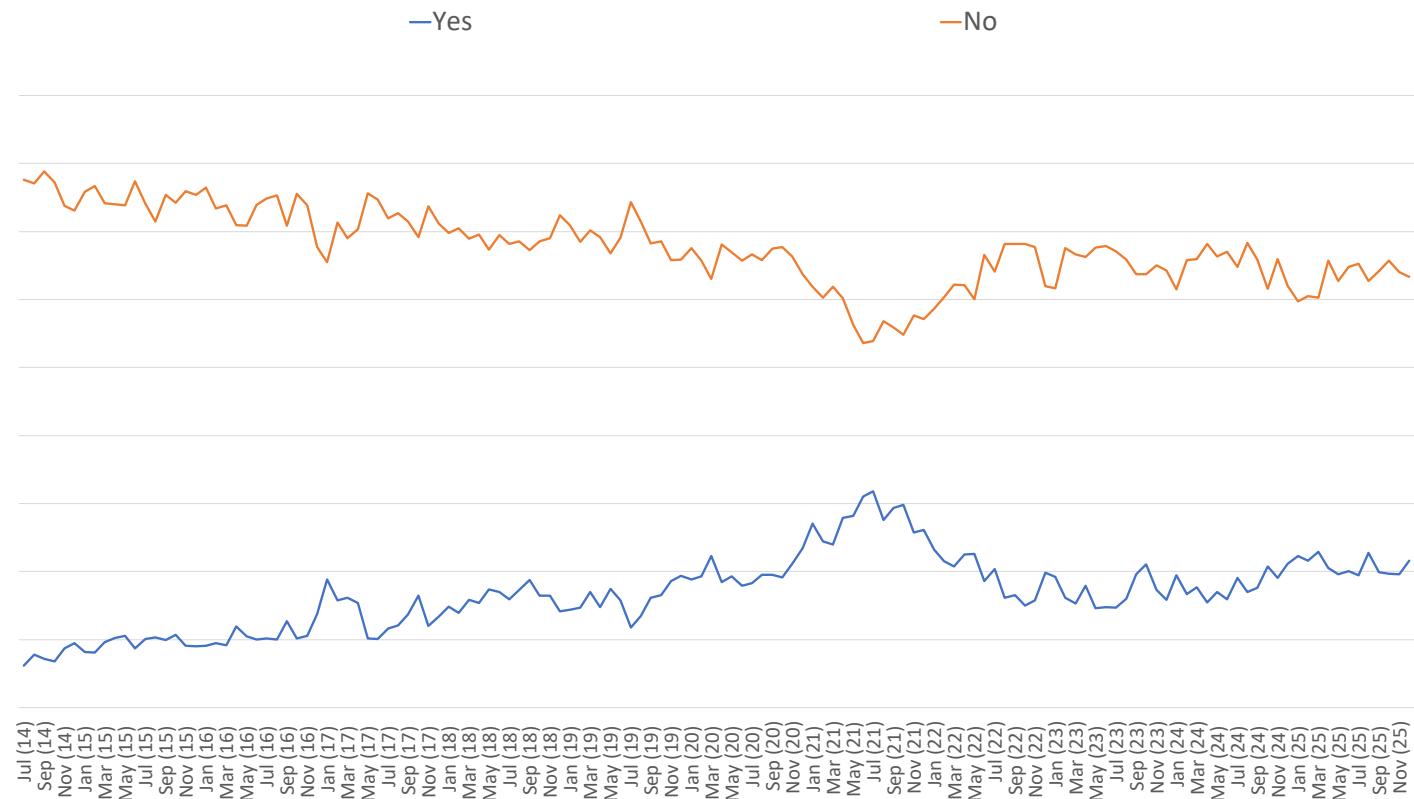
Posed to respondents who own/lease a car.



## MONTHLY AUTO TRACKER QUESTIONS

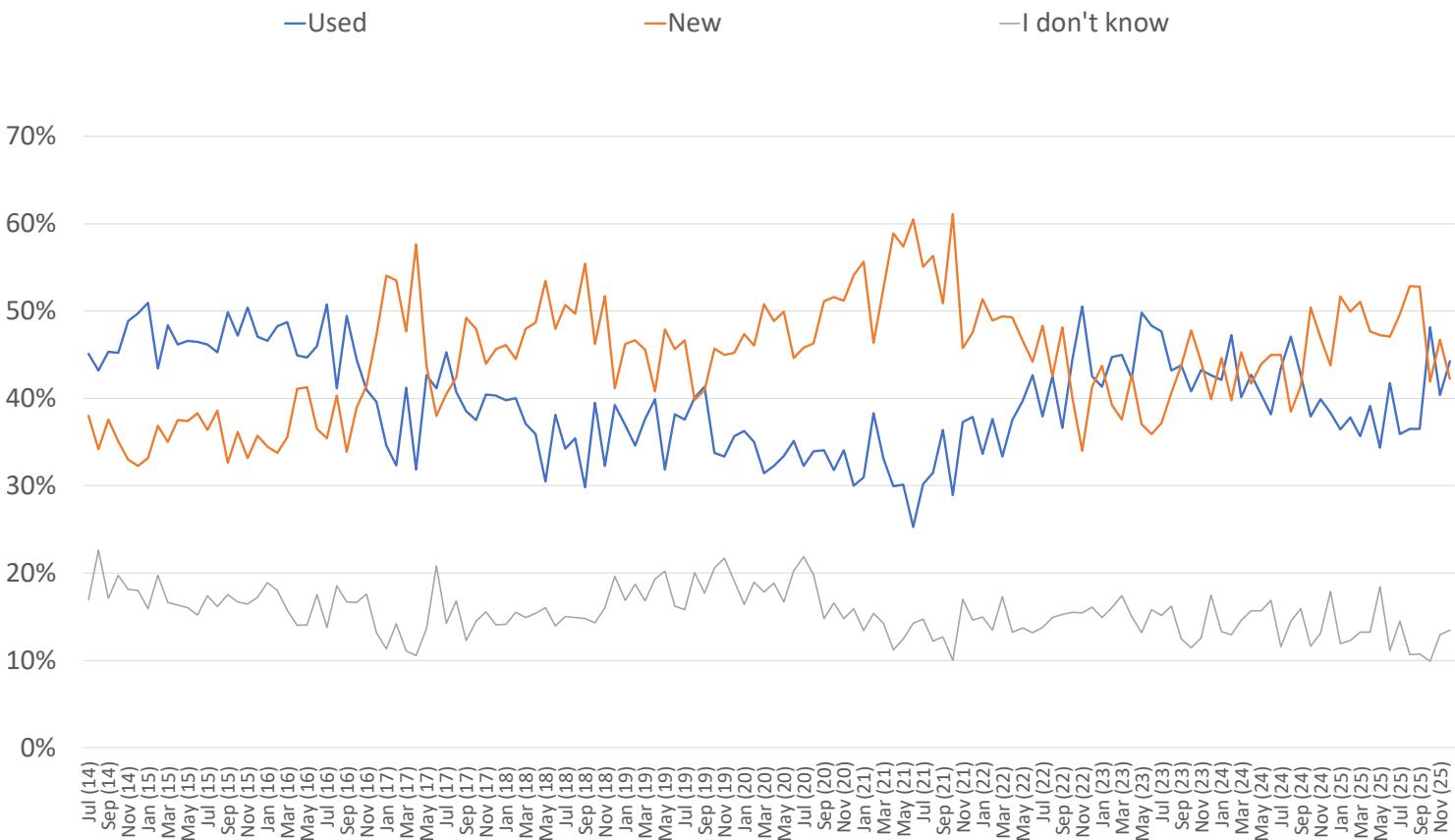
## DO YOU PLAN TO PURCHASE/LEASE A VEHICLE IN THE NEXT SIX MONTHS?

Posed to all respondents.



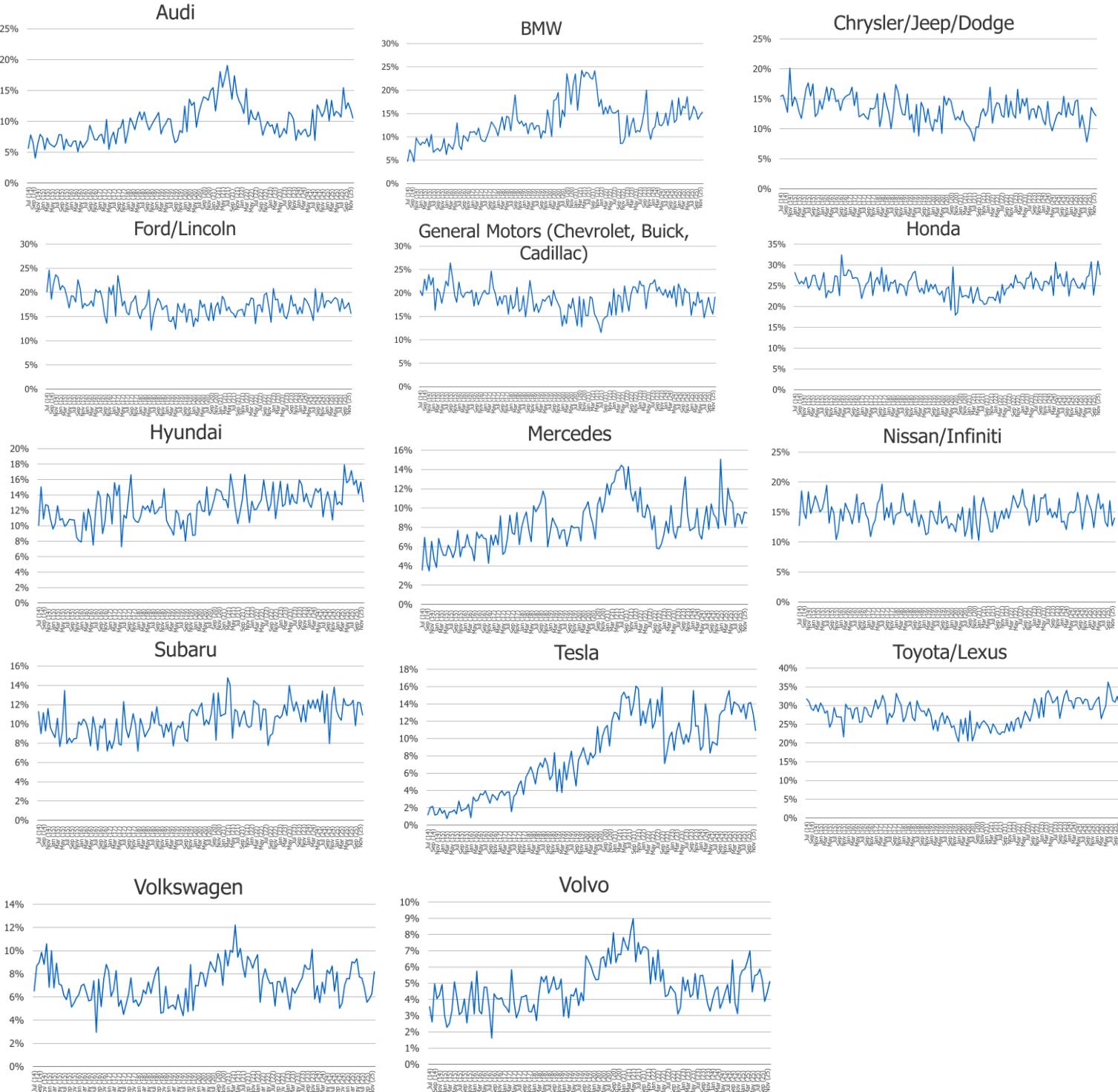
### WOULD YOU BE MORE LIKELY TO PURCHASE A NEW OR USED VEHICLE?

Posed to respondents who said yes or maybe when asked if they'll get a new vehicle in the next 6 months.



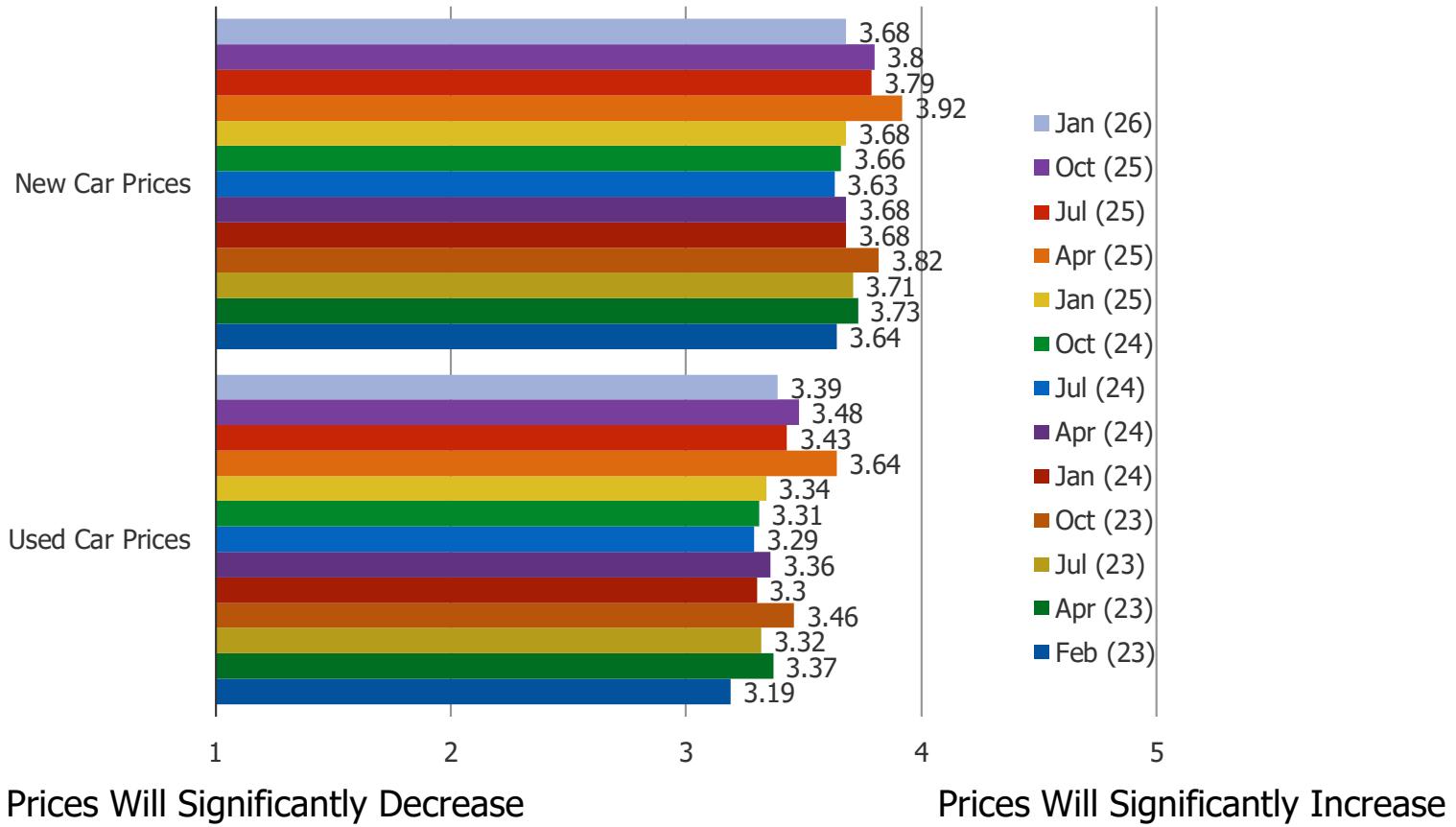
WHICH TYPES OF AUTOMOBILE WOULD YOU BE MOST LIKELY TO PURCHASE/LEASE IN THE NEXT SIX MONTHS?

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



OVER THE NEXT 12 MONTHS, ARE YOU EXPECTING THE FOLLOWING TO CHANGE?

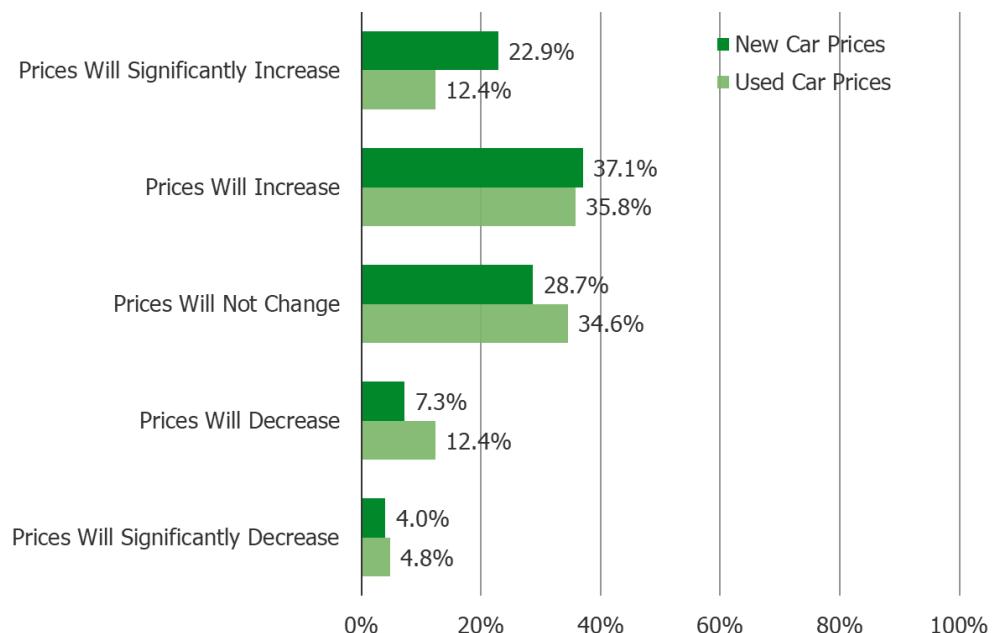
Posed to all respondents who have plans to purchase or lease a vehicle in the future.



Prices Will Significantly Decrease

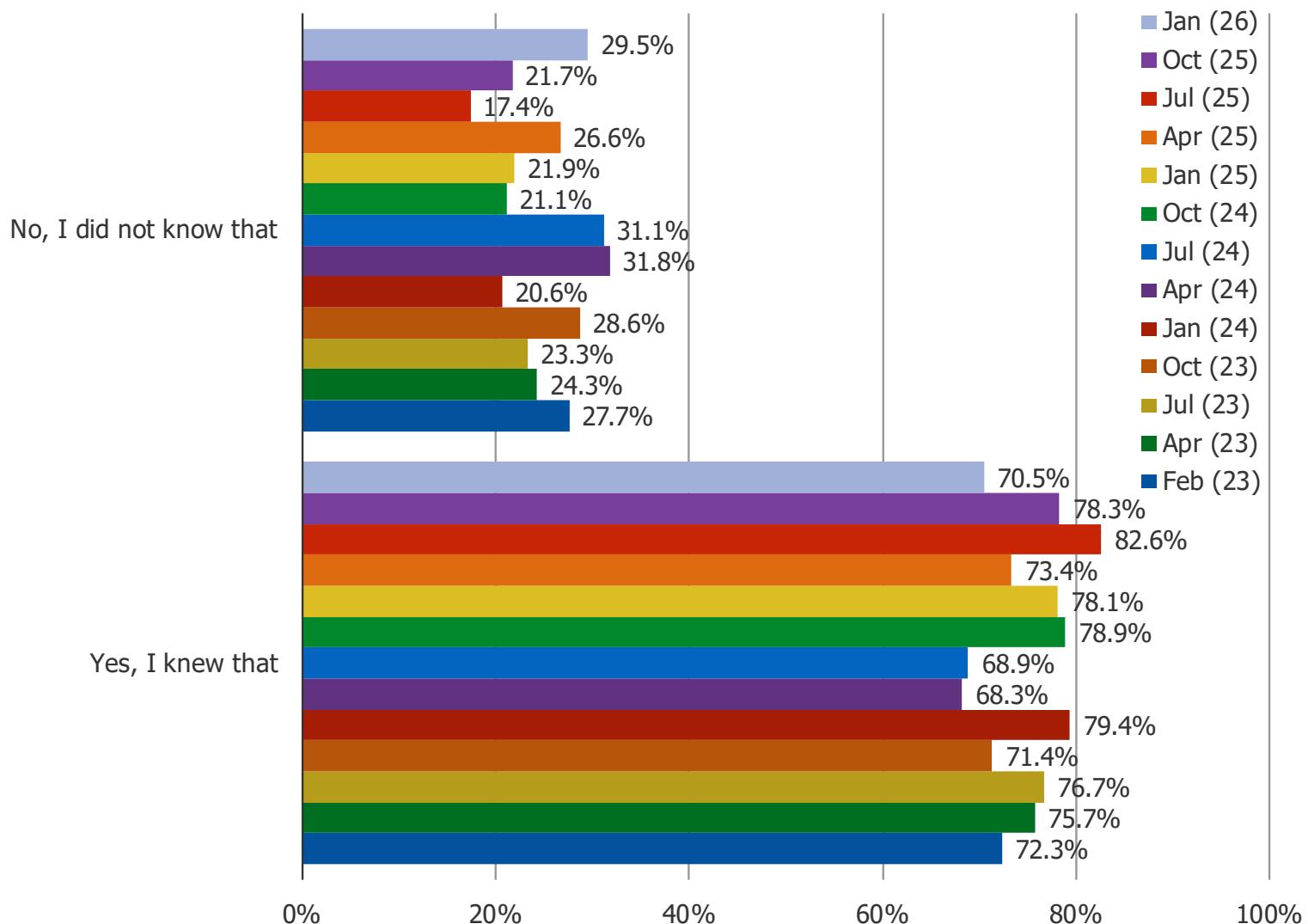
Prices Will Significantly Increase

January 2026



DID YOU KNOW THAT YOU CAN GET A TAX CREDIT WHEN PURCHASING SOME ELECTRIC VEHICLES THAT QUALIFY FOR THE CREDIT?

Posed to all respondents who have plans to purchase or lease a vehicle in the future and would likely go with an electric vehicle.



IF YOU WERE BUYING AN ELECTRIC VEHICLE TODAY, HOW IMPORTANT IT BE FOR YOU TO CHOOSE A VEHICLE THAT QUALIFIES FOR THE TAX CREDIT?

Posed to all respondents who have plans to purchase or lease a vehicle in the future and would likely go with an electric vehicle.

I would consider an electric vehicle that did not qualify for the tax credit if I liked it more

I would only buy an electric vehicle if it qualified for the tax credit

