

BESPOKE SURVEYS

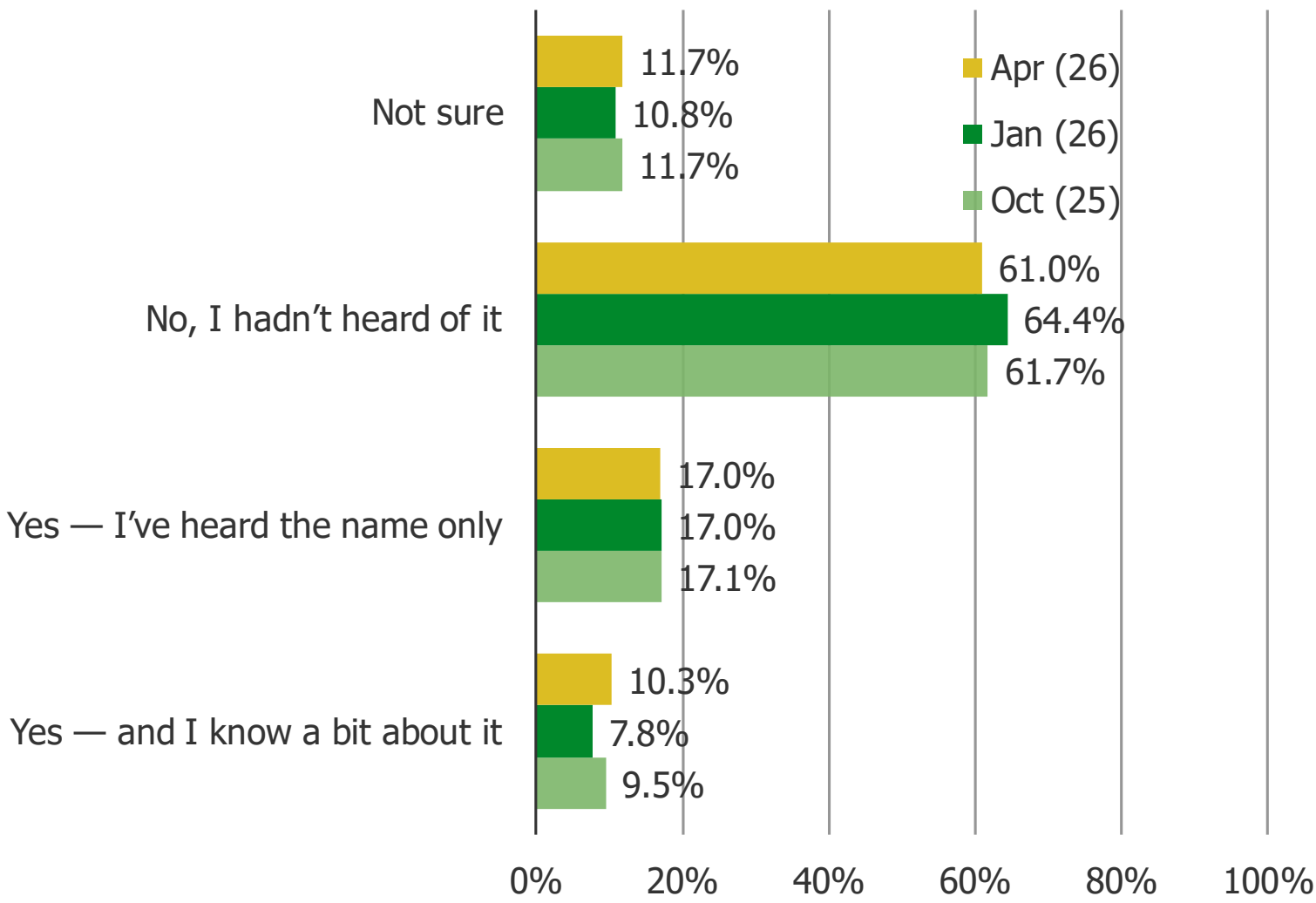
Autos and EVs, Vol 22

1,000 Consumers Per Wave, Balanced to Census

NEW QUESTIONS

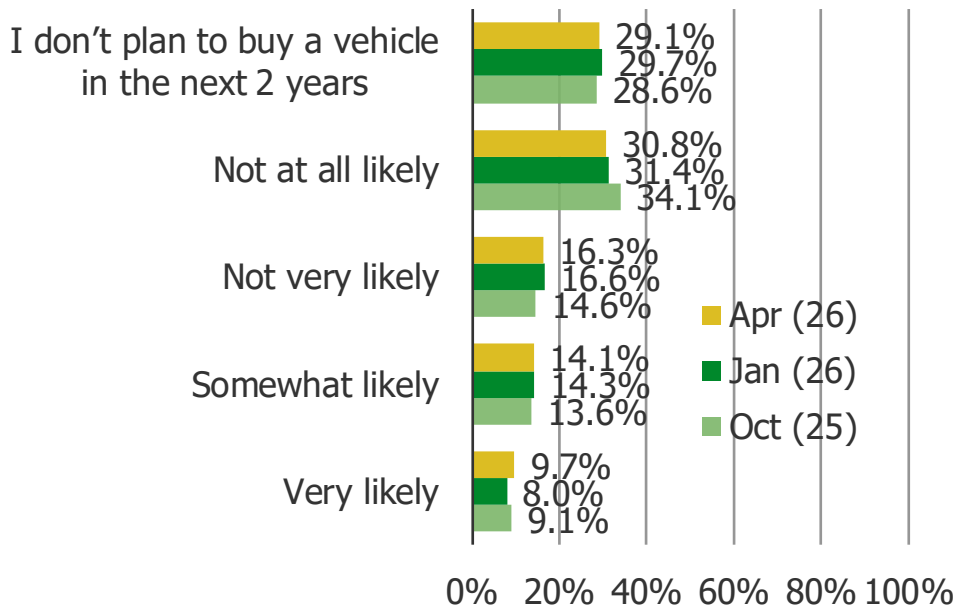
BEFORE THIS SURVEY, HAD YOU HEARD OF THE RIVIAN R2 (EXPECTED TO LAUNCH IN 2026)?

Posed to all respondents.



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.

Posed to all respondents.



Reasons for being UNLIKELY to consider it

(Includes respondents who answered "Not at all likely" or "Not very likely")

- Cost / Too Expensive: 32.6%**
The most common barrier by far. Respondents frequently cited the high price tag, being out of their budget, or simply not having the money for this tier of vehicle right now.
- Aversion to EV / Range Anxiety: 22.6%**
Nearly a quarter of detractors specifically pushed back against it being an electric vehicle. Many explicitly stated they only want gas-powered cars or expressed concerns about battery life and charging.
- Dislike the Design / Aesthetics: 16.4%**
These respondents criticized the physical appearance of the vehicle. Words like "ugly," "hideous," and "don't like the style" were extremely common in this bucket.
- No Need / Happy with Current Car: 5.5%**
A smaller segment clarified they aren't against the car necessarily, but they just bought a car recently or have no need to upgrade right now.
- Other / Unspecified Negative: 31.2%**
These were vague or short responses that didn't provide a specific reason (e.g., "Nope", "Just don't want it", "Not my cup of tea", "Don't know").

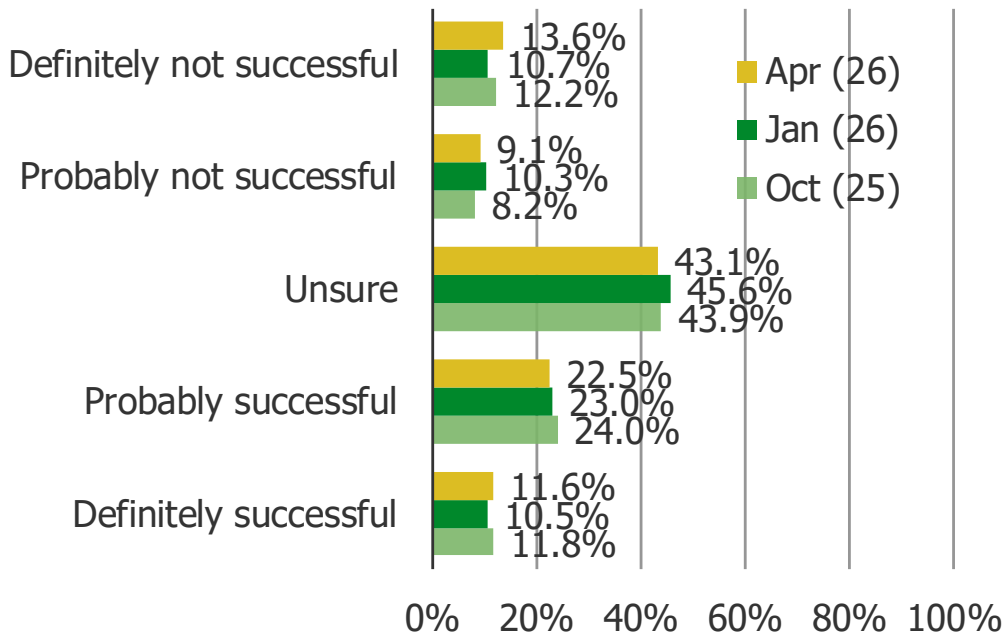
Reasons for being LIKELY to consider it

(Includes respondents who answered "Very likely" or "Somewhat likely")

- Love the Design / Aesthetics: 30.9%**
Design was the #1 specific driver for people who want the vehicle. They frequently used words like "cool," "sharp," "beautiful," and praised its modern styling.
- Brand Reputation / General Positive Sentiment: 25.1%**
About a quarter of potential buyers cited their trust in the brand (specifically naming Rivian), its reputation, or general excitement about the vehicle's quality.
- Good Price / Perceived Value: 19.7%**
Interestingly, while the detractors felt it was too expensive, roughly 1 in 5 buyers cited the price as a primary reason they want it, viewing it as a highly affordable deal for what you get.
- Features / EV Tech / Size: 16.6%**
These respondents were drawn to the specifics of the vehicle—highlighting the fact that it is an EV, praising the technology, or noting that the size/capacity fits their needs.
- Other / Unspecified Positive: 34.7%**
Similar to the negative group, a third of the responses were brief, generic affirmations without a highly specific reason (e.g., "Love it", "Nice car", "Looks good").

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

Posed to all respondents.



Reasons for Believing it will be UNSUCCESSFUL

(Includes "Definitely not successful" and "Probably not successful")

- Too Expensive / Poor Economy (21.4%)**
 Economic conditions and the high price tag are the main reasons for pessimism. Respondents cited the cost of the vehicle as well as general economic struggles ("people can't afford this right now").
- Dislike the Design (14.3%)**
 Directly mirroring the optimism group, a segment of detractors simply found the vehicle visually unappealing, heavily using words like "ugly" and "boxy."
- Anti-EV Sentiment / Range Anxiety (13.1%)**
 A solid segment feels the vehicle will fail simply because it is electric. They cite a lack of charging infrastructure, range issues, or a belief that the "EV fad is dying."
- Lack of Brand Awareness (9.9%)**
 Nearly 10% of detractors stated the car will fail because nobody knows who Rivian is compared to legacy automakers.
- Other / General Negative (46.4%)**
 (Many detractors left vague reasons like "Just don't think so," "No," or "Doubt it" without specifying a distinct market critique).

Reasons for Believing it will be SUCCESSFUL

(Includes "Definitely successful" and "Probably successful")

- Strong Design / Aesthetics (32.5%)**
 The physical appearance of the vehicle is the primary driver of optimism. Respondents praised it as "cool," "sharp," and "beautiful."
- Growing EV Demand / Tech (20.4%)**
 Many respondents pointed to broader market trends, citing the vehicle's features, the popularity of EVs, and the fact that it aligns with current consumer tech demands.
- Brand Appeal / Tesla Alternative (9.8%)**
 About 1 in 10 respondents specifically called out the Rivian brand's reputation or framed the vehicle as a strong, needed competitor to Tesla.
- Good Price Point (7.3%)**
 A smaller but notable group felt the pricing was highly competitive for an electric vehicle of this size.
- Other / General Positive Affirmation (44.2%)**
 (A large portion of respondents just left brief, generic praise like "Nice car", "Looks good", or "I like it" without giving a specific market reason).

If you had to use one word (Rivian R2) to describe how this vehicle looks, what would you say?

- **Positive Words: 51.3%**
(e.g., sleek, nice, cool, modern, futuristic, impressive, premium, beautiful)
- **Negative Words: 26.4%**
(e.g., ugly, weird, boring, clunky, bland, bulky, unattractive, expensive)
- **Neutral Words: 22.4%**
(e.g., boxy, different, okay, square, big, robot, normal)

Summary of the sentiment:

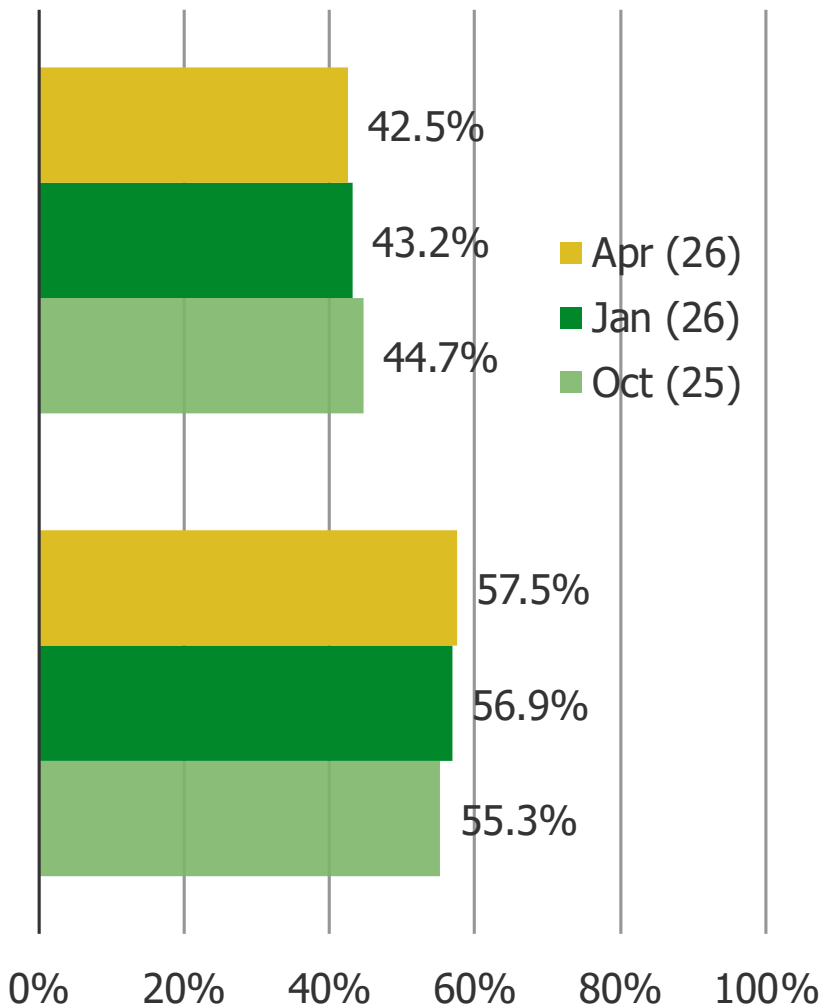
While the single most used word overall was negative ("ugly"), the *cumulative* sentiment of the words used leans heavily positive. People who like the vehicle used a wide variety of positive words (sleek, cool, modern, futuristic), whereas the people who disliked the vehicle almost entirely rallied around just a few negative words (ugly, weird, boring).

The Top 10 Words

1. **Ugly:** 10.36% (*The most frequently used word by a wide margin*)
2. **Sleek:** 4.19%
3. **Nice:** 3.92%
4. **Cool:** 3.82%
5. **Boxy:** 3.58%
6. **Modern:** 3.51%
7. **Futuristic:** 3.14%
8. **Good:** 2.69%
9. **Great:** 1.64%
10. **Weird:** 1.50%

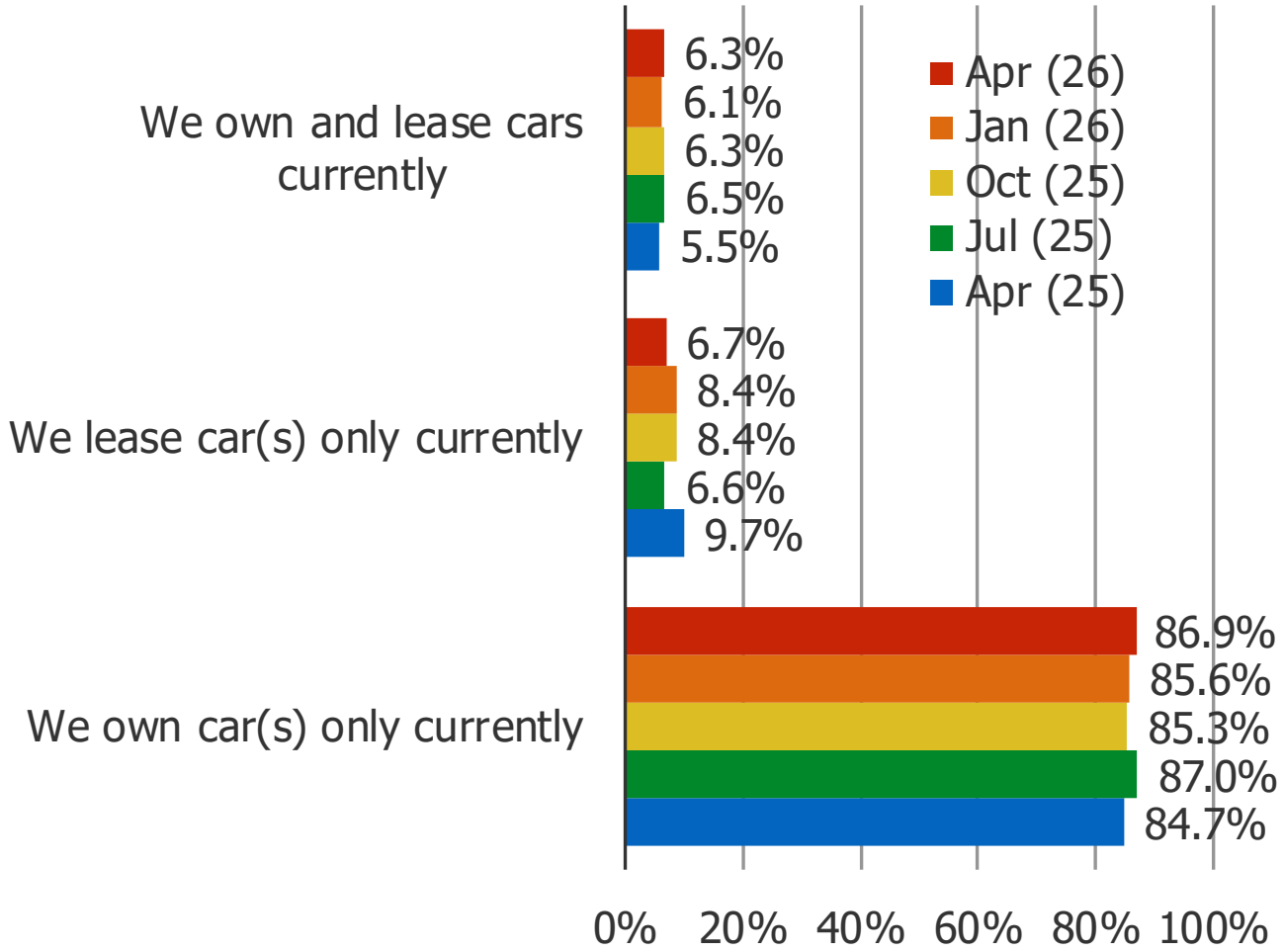
WHICH OF THE FOLLOWING VEHICLES DO YOU LIKE BETTER?

Posed to all respondents.



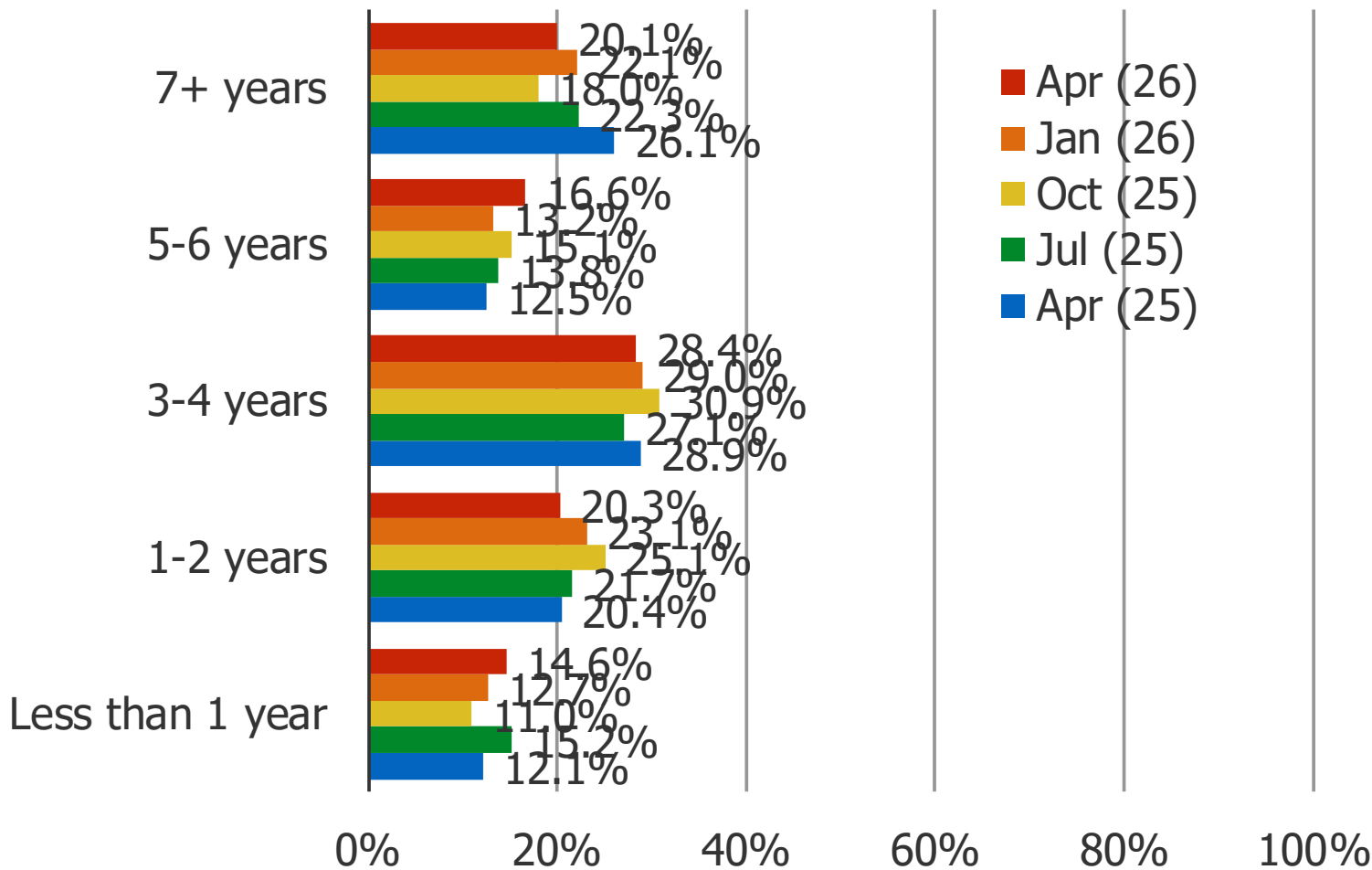
WHICH OF THE FOLLOWING BEST DESCRIBES YOUR HOUSEHOLD...

Posed to all respondents who own or lease a vehicle.



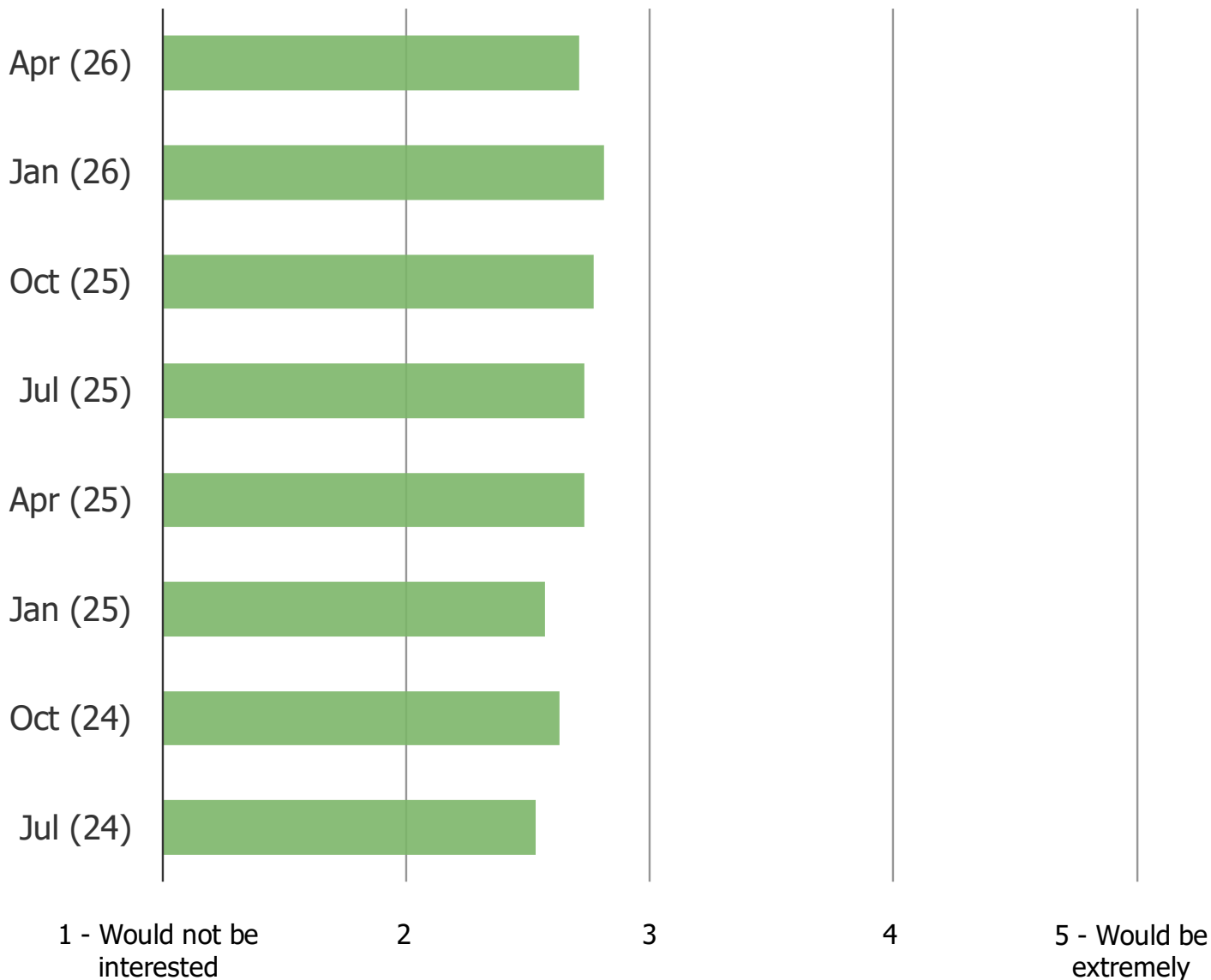
FOR HOW LONG HAVE YOU OWNED YOUR PRIMARY CAR/VEHICLE?

Posed to all respondents who own or lease a vehicle.



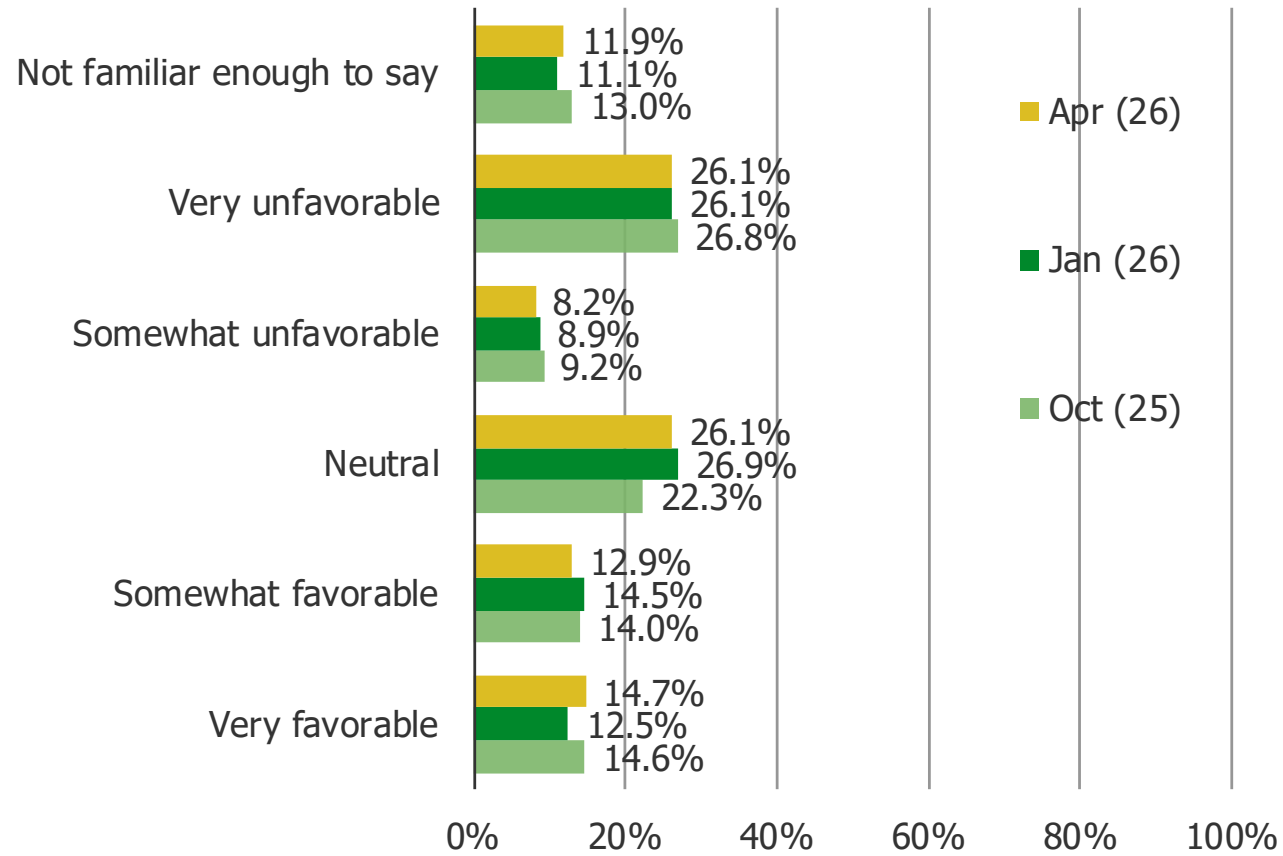
IF AUTONOMOUS DRIVING COULD BE PERFECTED TO THE POINT WHERE IT WAS SAFER THAN HUMANS DRIVING, HOW MUCH INTEREST WOULD YOU HAVE IN HAVING A VEHICLE THAT COULD FULLY DRIVE ITSELF?

Posed to all respondents.



WHAT IS YOUR OPINION OF THE TESLA BRAND?

Posed to all respondents.



WHAT IS YOUR OVERALL OPINION OF THE TESLA BRAND?

Posed to all respondents.

 **Reasons for an UNFAVORABLE Opinion**

(Includes "Very unfavorable" and "Somewhat unfavorable")

- **Dislike of Elon Musk (53.2%)**
This is the overwhelming driver of negative sentiment regarding Tesla. More than half of the detractors explicitly named "Elon," "Musk," or "the CEO/owner" as the primary reason they view the brand unfavorably.
- **Anti-EV Sentiment (12.6%)**
A distinct group dislikes the brand simply because they dislike electric vehicles in general.
- **Safety & Quality Concerns (10.8%)**
These respondents brought up issues regarding trust, build quality, safety features, and battery fire concerns.
- **Dislike the Design / Cybertruck (8.3%)**
A smaller segment noted they find the vehicles "ugly" or specifically called out a dislike for the Cybertruck.
- **Too Expensive (7.2%)**
Some simply viewed the brand unfavorably due to its high price point.
- **Other / Unspecified Negative (22.3%)**
(General negative statements without specific reasons).

WHAT IS YOUR OVERALL OPINION OF THE TESLA BRAND?

Posed to all respondents.

 **Reasons for a FAVORABLE Opinion**

(Includes "Very favorable" and "Somewhat favorable")

- **Good Quality / Positive Reputation (31.1%)**

The most common specific praise centered around the cars being "good," "great," "reliable," and praising the brand's overall market reputation.

- **Innovation & Tech Leader (24.5%)**

Nearly a quarter of fans love Tesla specifically for its technology. They view the brand as the "industry leader," "innovative," and advanced.

- **Electric / Environmental Focus (10.4%)**

These respondents specifically praised the company for its sustainability mission, electric focus, and environmental impact.

- **Fan of Elon Musk (9.4%)**

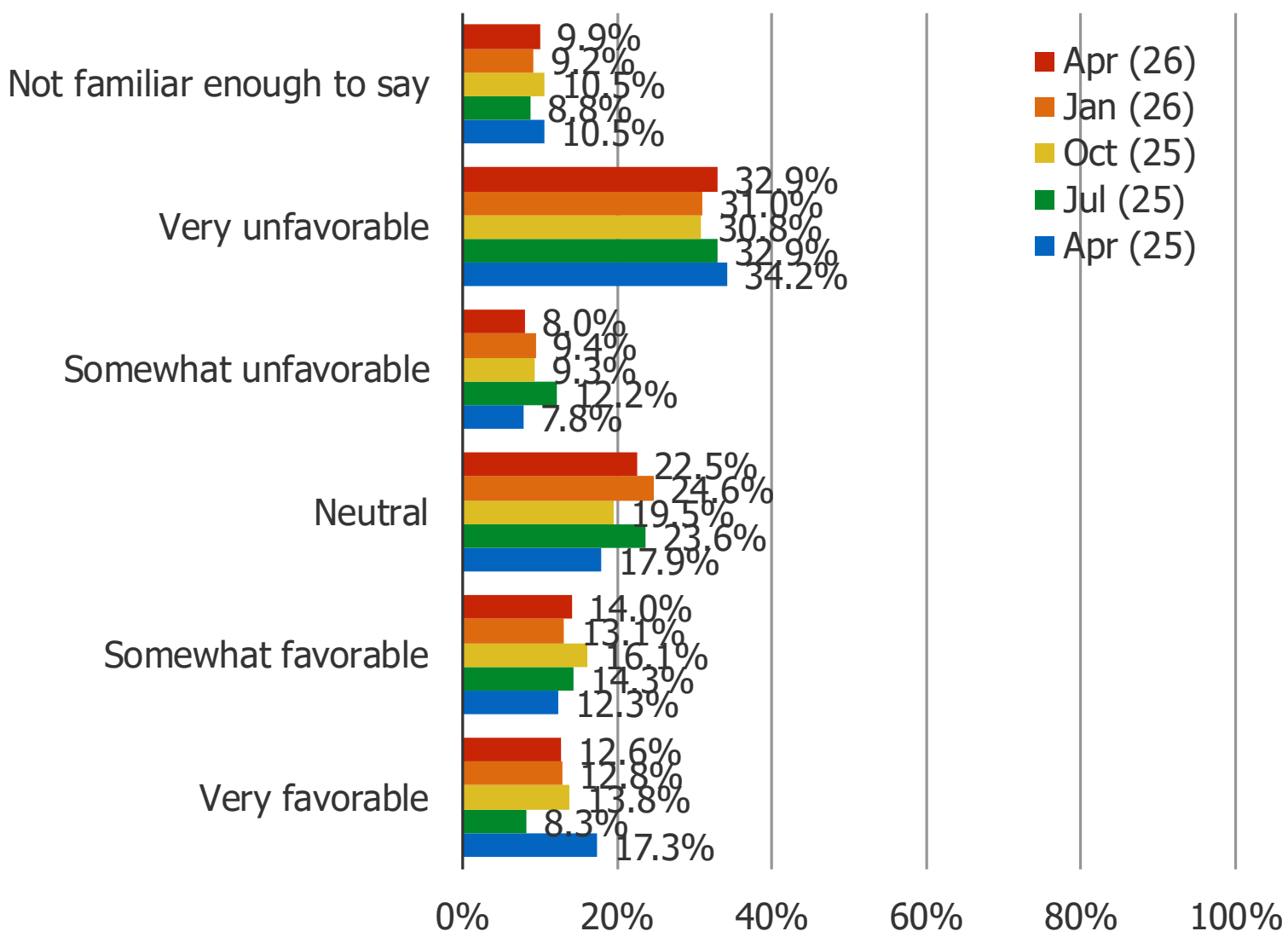
In direct contrast to the detractors, about 1 in 10 supporters specifically named Elon Musk as the reason they love the brand.

- **Other / Unspecified Positive (36.8%)**

(General positive affirmations like "Nice cars" or "I like them" without further detail).

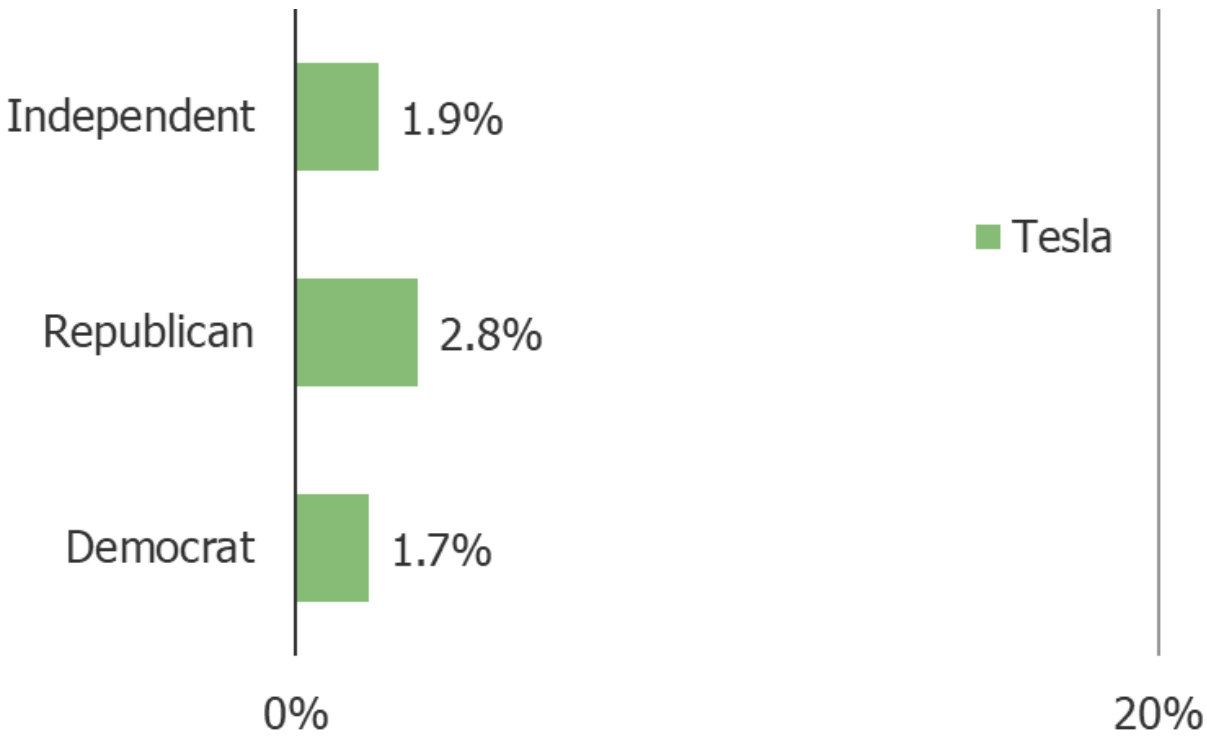
WHAT IS YOUR OVERALL OPINION OF ELON MUSK?

Posed to all respondents.



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

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

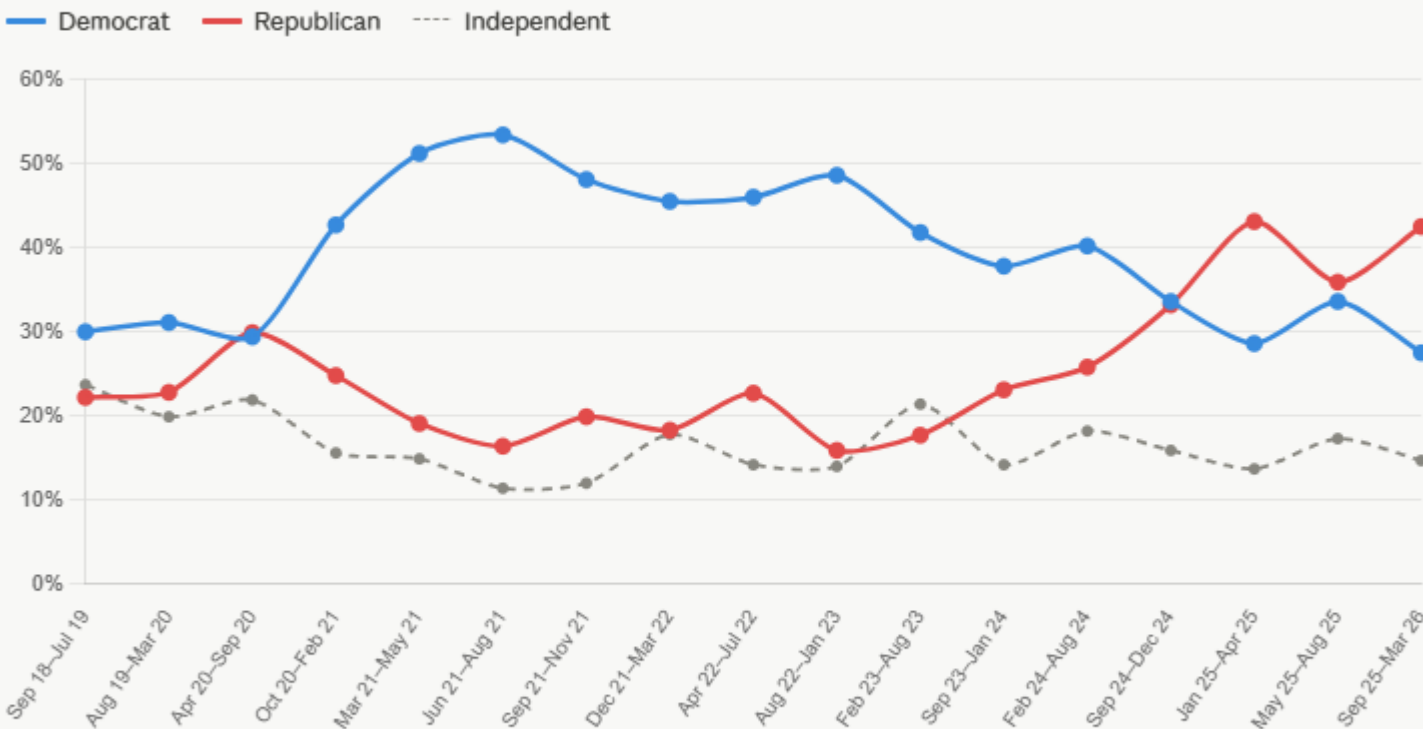


CONSUMERS WHO SAID THEY ARE LIKELY TO GET A TESLA IN THE NEXT 6 MONTHS – POLITICAL AFFILIATION TRACKER

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

Party affiliation of likely Tesla buyers

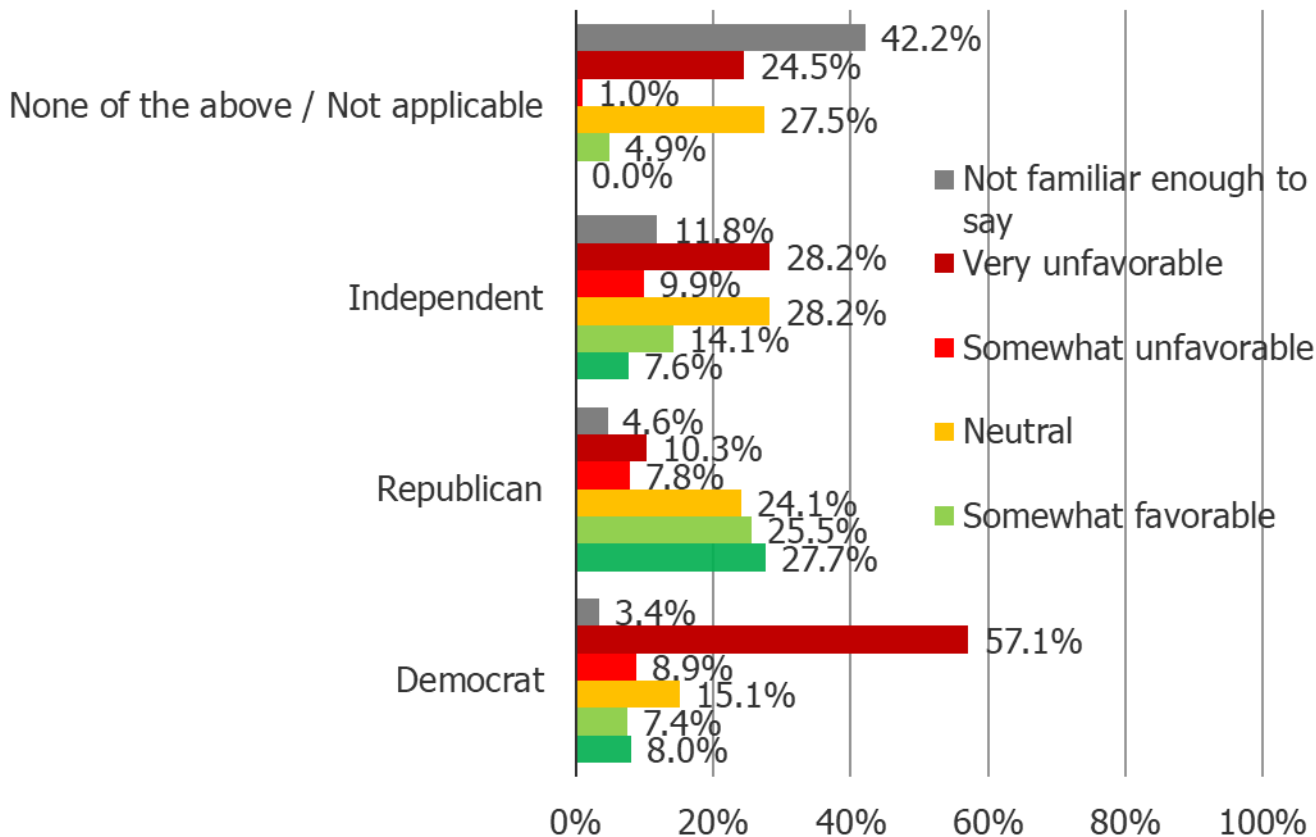
Share of respondents saying they're likely to buy a Tesla in the next 6 months, grouped so each period has N ≥ 200



The crossover: Republicans overtook Democrats as the largest group of likely Tesla buyers in the Jan-Apr 2025 period — the first time in the 7+ year series.

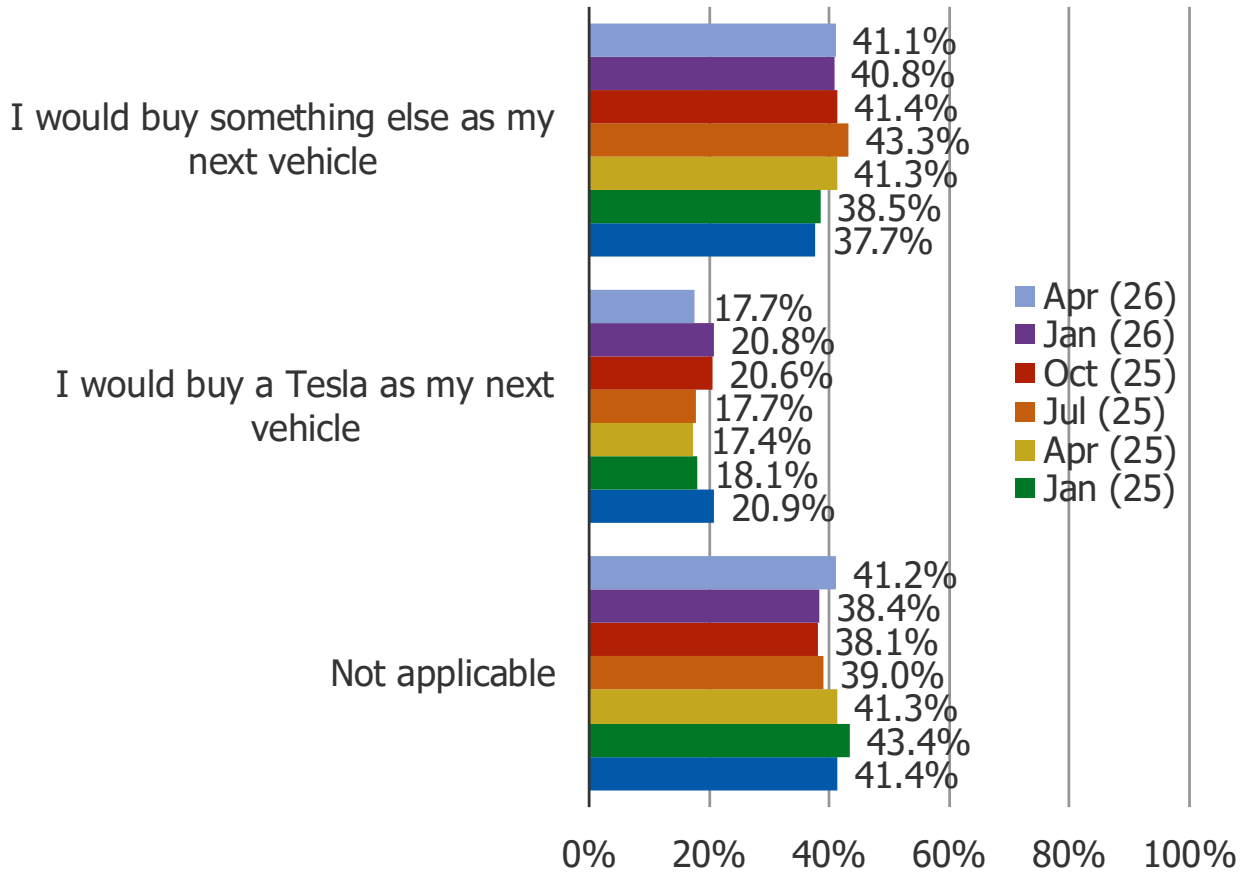
WHAT IS YOUR OVERALL OPINION OF ELON MUSK?

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.



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?...

 **Reasons for choosing: "I would buy a Tesla"**

If Tesla perfected safe autonomy, here is what pushes this group to buy:

- **Excitement for Autonomous Tech (20.4%)**
These buyers are specifically drawn to the self-driving technology and features, viewing it as the "future" of driving.
- **Prioritization of Safety (18.8%)**
This segment focused heavily on the prompt's condition that the vehicle was "safer than humans." Safety and the protection of their families is their primary driver.
- **General Brand Affinity (17.6%)**
These respondents simply like Tesla. They think the cars look "great," "cool," or they are already fans of the brand.
- **Best / Only Option Available (11.4%)**
This group framed it logically: if Tesla is the *only* one offering the safest tech, then it is automatically the best choice on the market.
- **Other / Unspecified Positive (42.5%)**
(Many respondents in this group left brief answers like "Why not," "Because," or "I trust them" without elaborating).

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?...

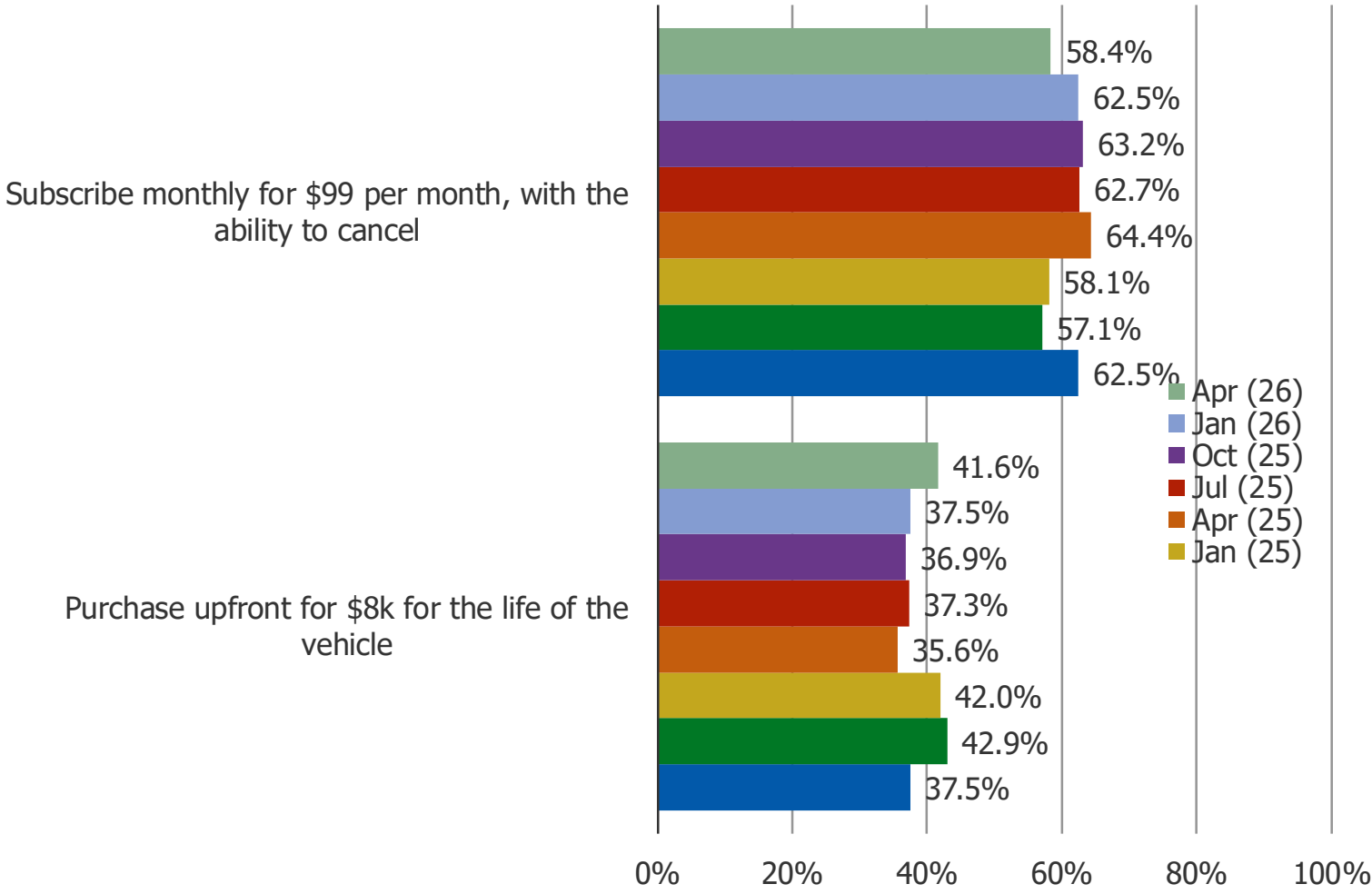
Reasons for choosing: "I would buy something else"

Even if Tesla perfected safe autonomy, here is why this group *still* refuses to buy one:

- **Dislike of Elon Musk (18.2%)**
Consistent with the previous brand analysis, nearly 1 in 5 detractors explicitly refuse to buy the car because they do not want to support Elon Musk.
- **Anti-EV / Prefer Gas (17.5%)**
A large segment refuses to buy a Tesla simply because they only want to drive gas-powered cars.
- **Distrust of Tech / Autonomy (17.0%)**
Despite the prompt explicitly stating the tech was "perfected and safer," this group fundamentally rejects the premise. They refuse to trust a computer to drive for them and insist on being in control.
- **Too Expensive (12.8%)**
This group acknowledges they simply cannot afford a Tesla, regardless of what features it has.
- **General Animosity towards Tesla (11.4%)**
These respondents expressed intense brand rejection using words like "hate," "never," or simply stating they exclusively buy other specific brands (e.g., Ford or Toyota).
- **Other / Unspecified Negative (40.3%)**
(General rejections like "Don't want one," "Just no," or "Don't like how they look").

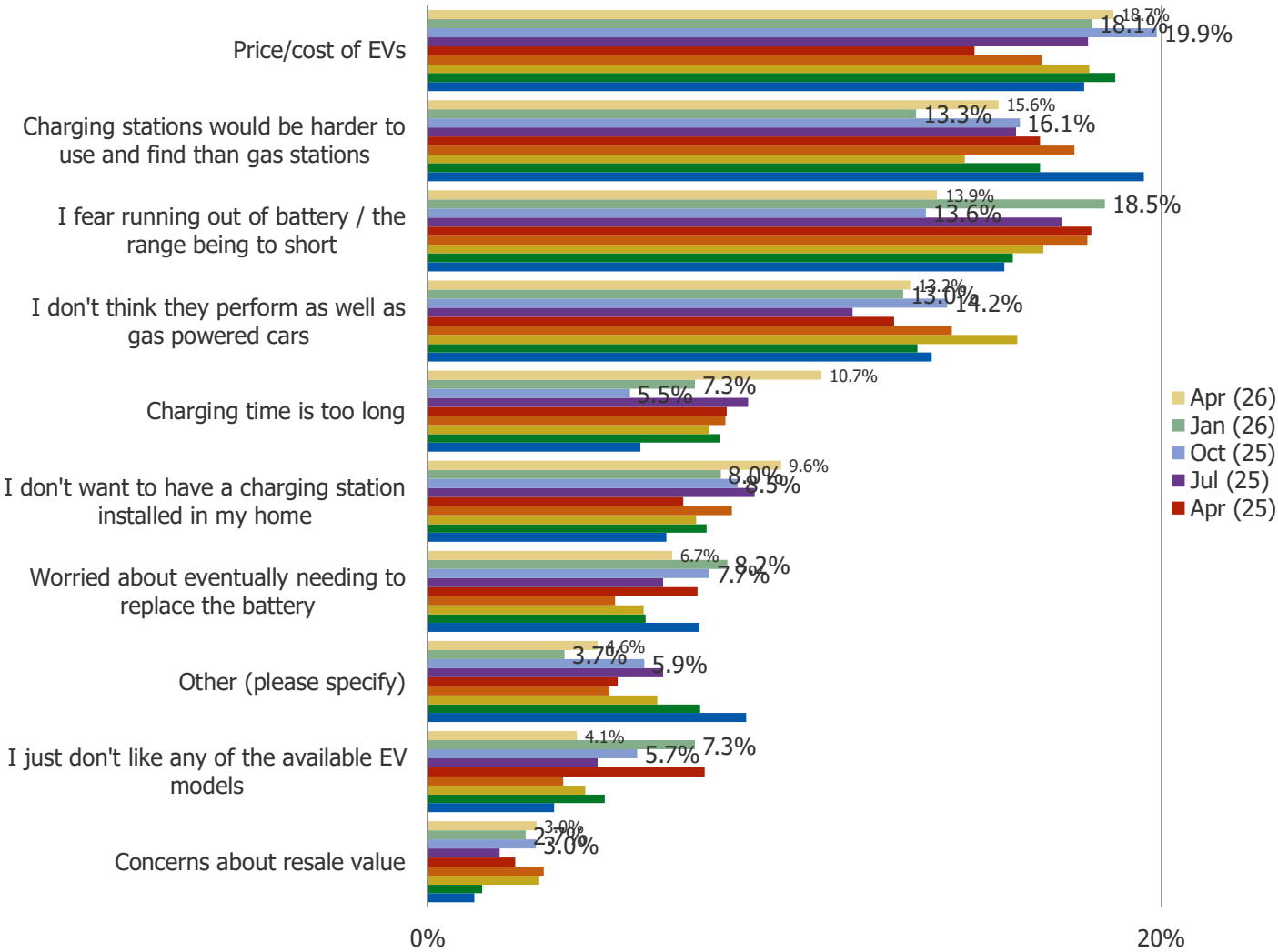
IF YOU HAD THE OPTION TO ADD FULL SELF DRIVING CAPABILITIES TO YOUR VEHICLE, WHICH WOULD YOU FIND MORE ATTRACTIVE?

Posed to all respondents.



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

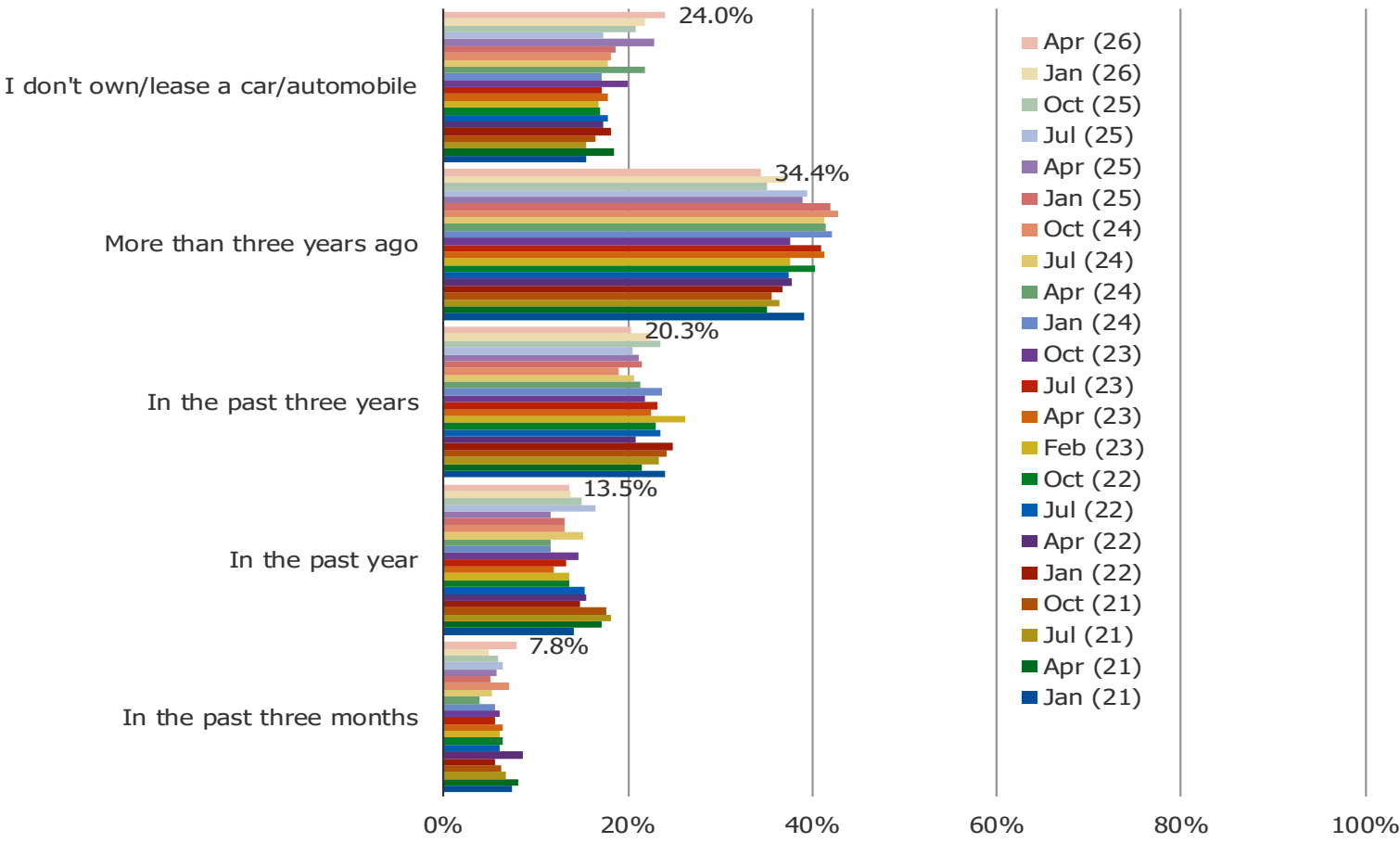
Posed to all respondents who are likely to purchase a gas vehicle for their next vehicle (N = 540)



AUTOS AND EVS

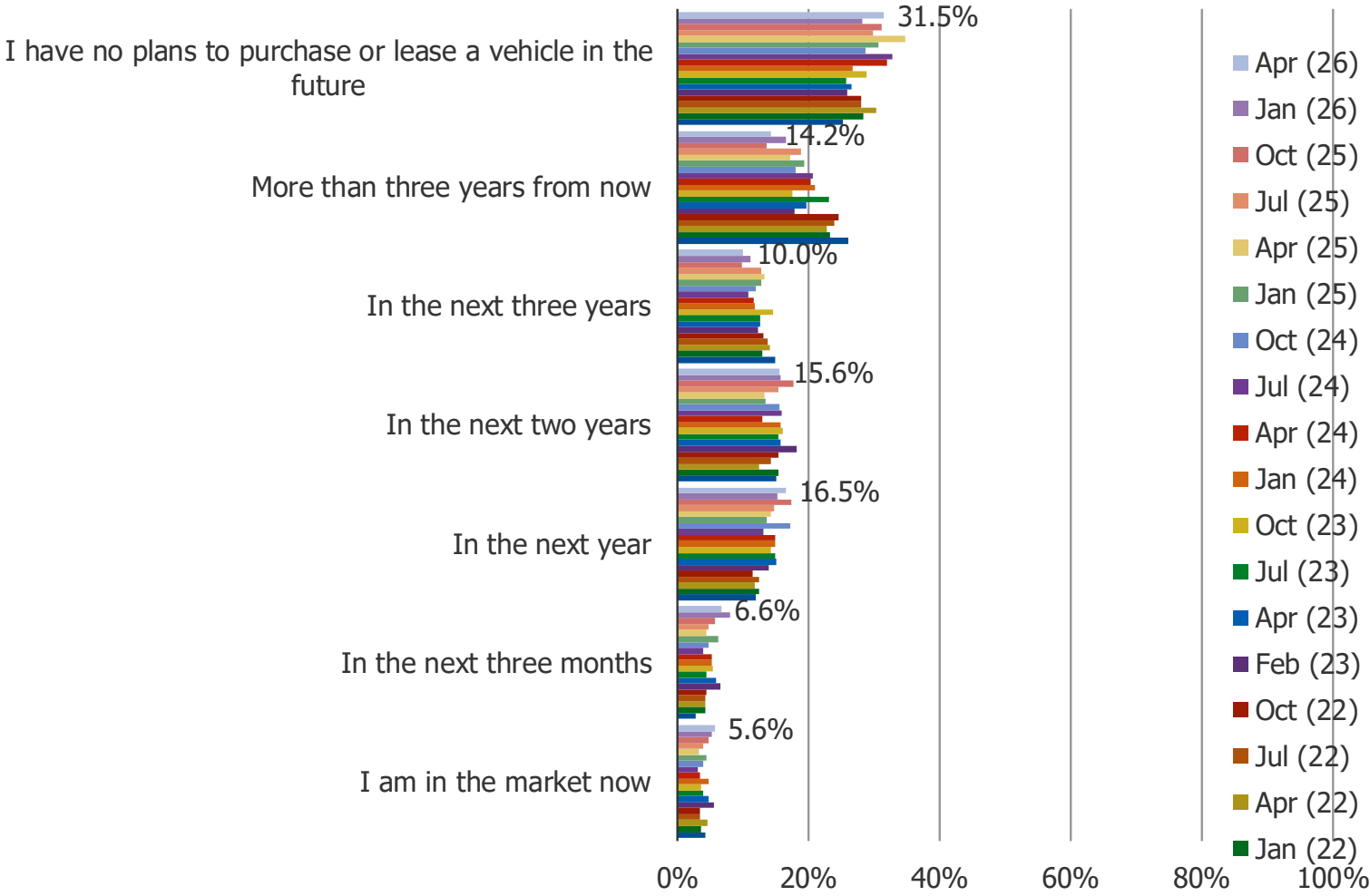
WHEN IS THE LAST TIME YOU PURCHASED OR LEASED A CAR/AUTOMOBILE?

Posed to all respondents.



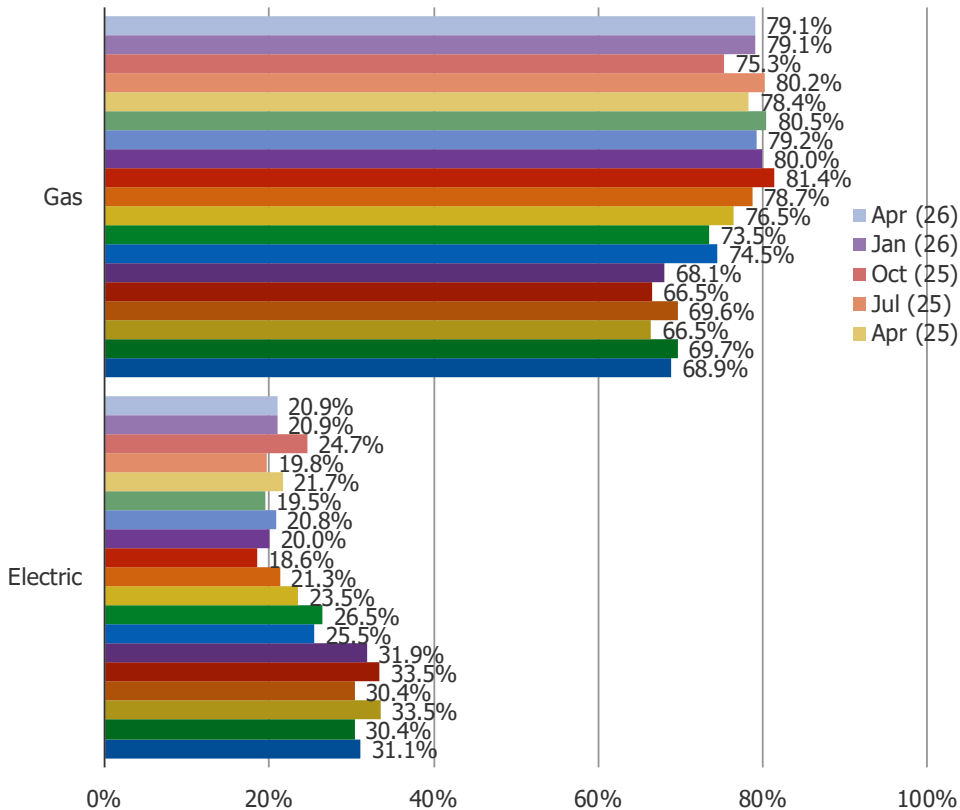
WHEN ARE YOU MOST LIKELY TO PURCHASE OR LEASE A VEHICLE NEXT?

Posed to all respondents.

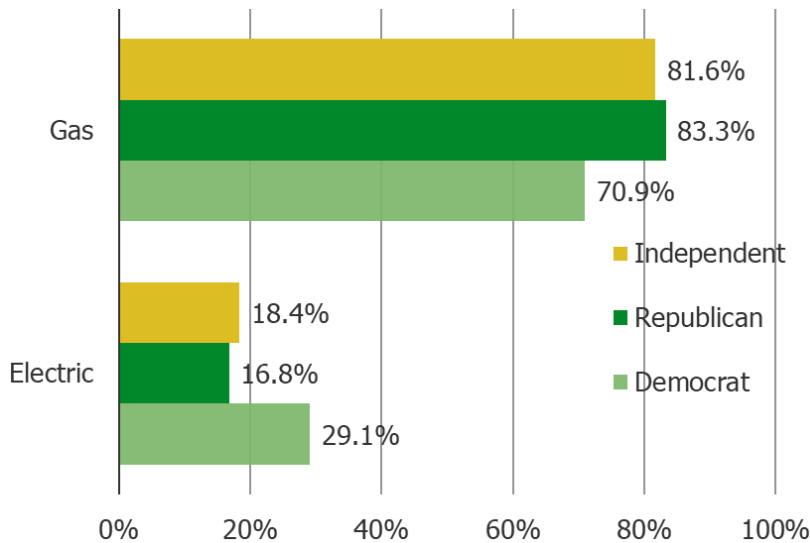


THINKING ABOUT THE NEXT VEHICLE YOU WILL PURCHASE OR LEASE, IS IT MORE LIKELY TO BE:

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

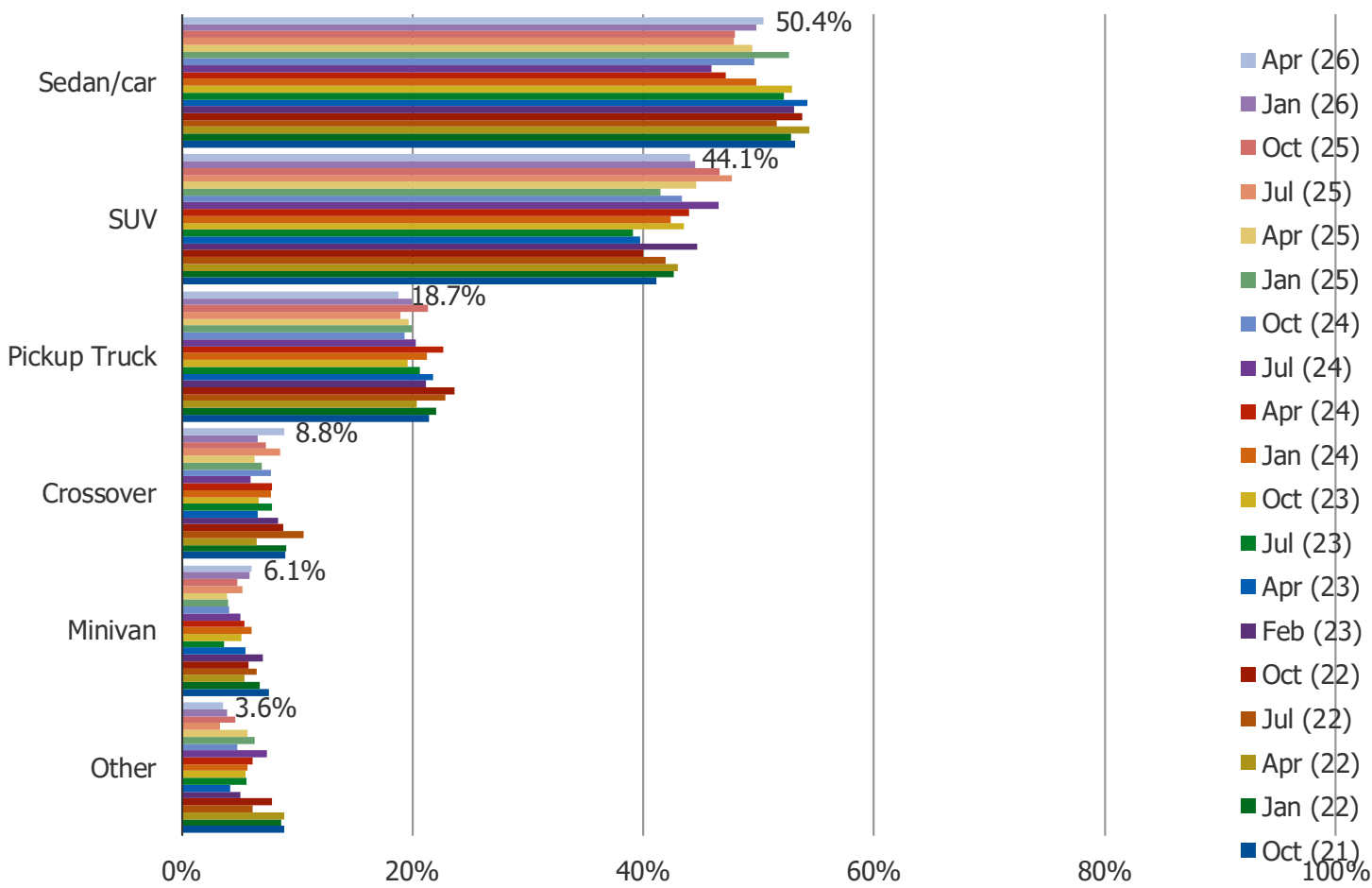


Cross-tabbing the data above...



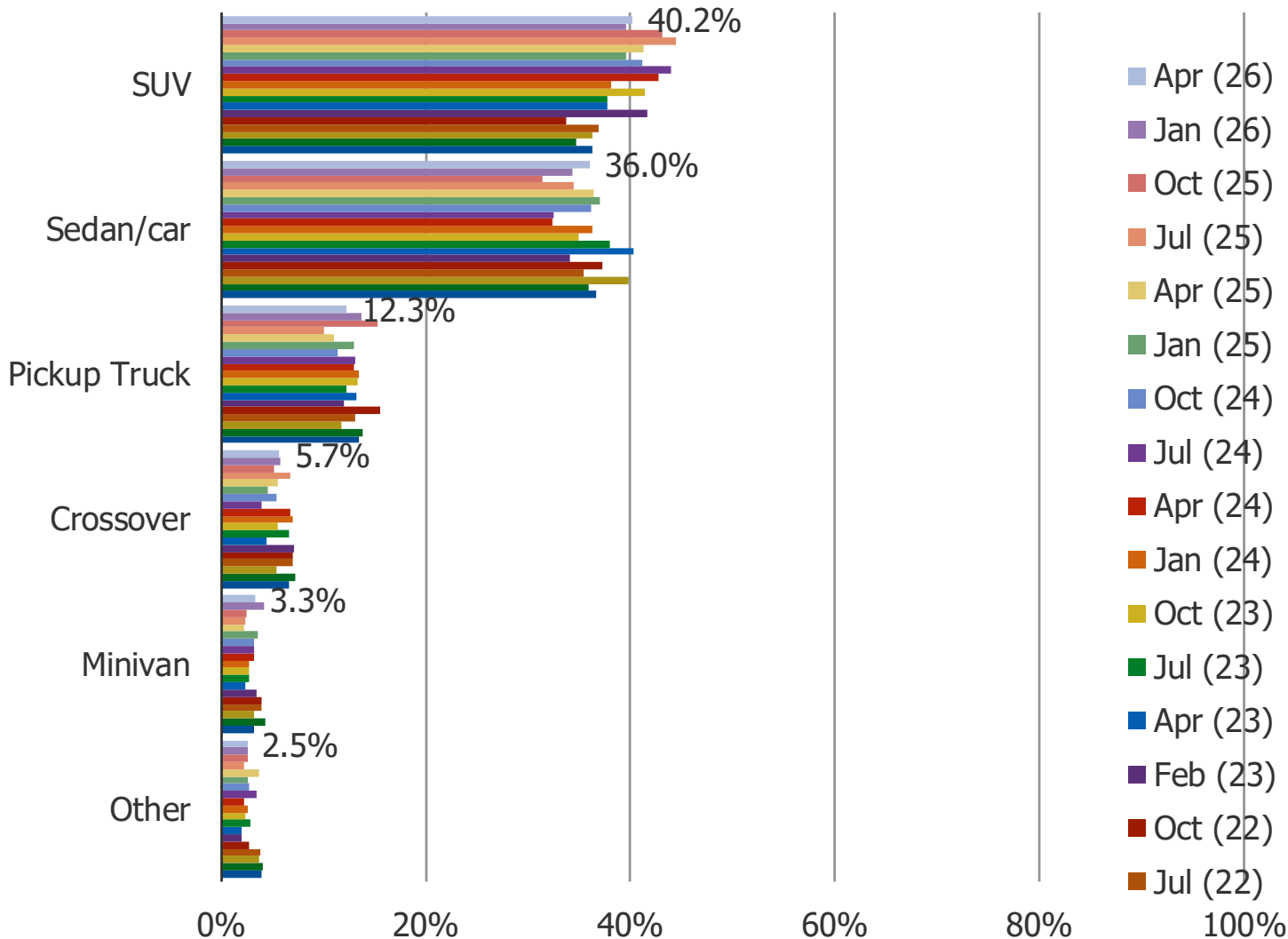
WHICH OF THE FOLLOWING DO YOU CURRENTLY OWN IN YOUR HOUSEHOLD? (SELECT ALL THAT APPLY)

Posed to all respondents



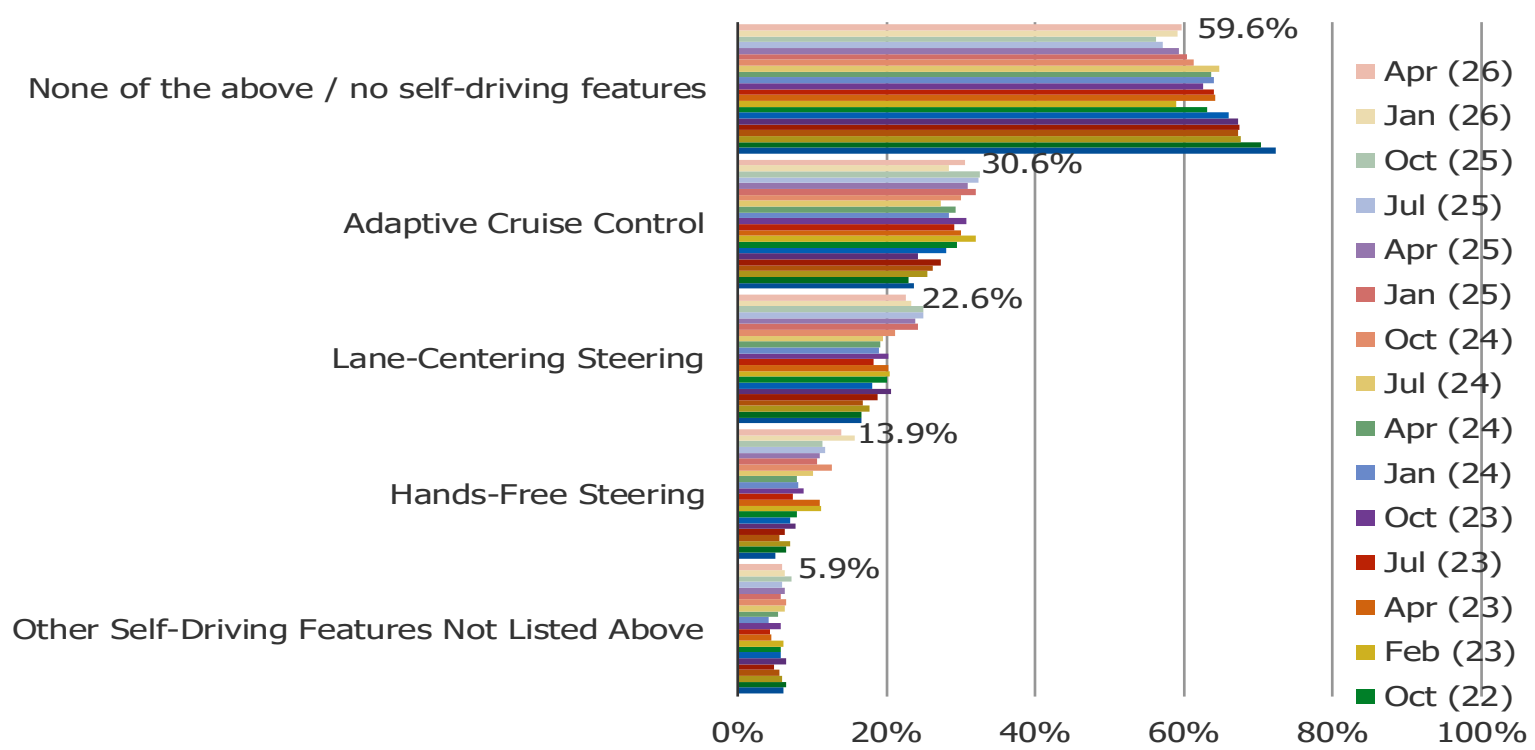
WHICH IS YOUR MOST PREFERRED TYPE OF VEHICLE TO OWN/LEASE?

Posed to all respondents



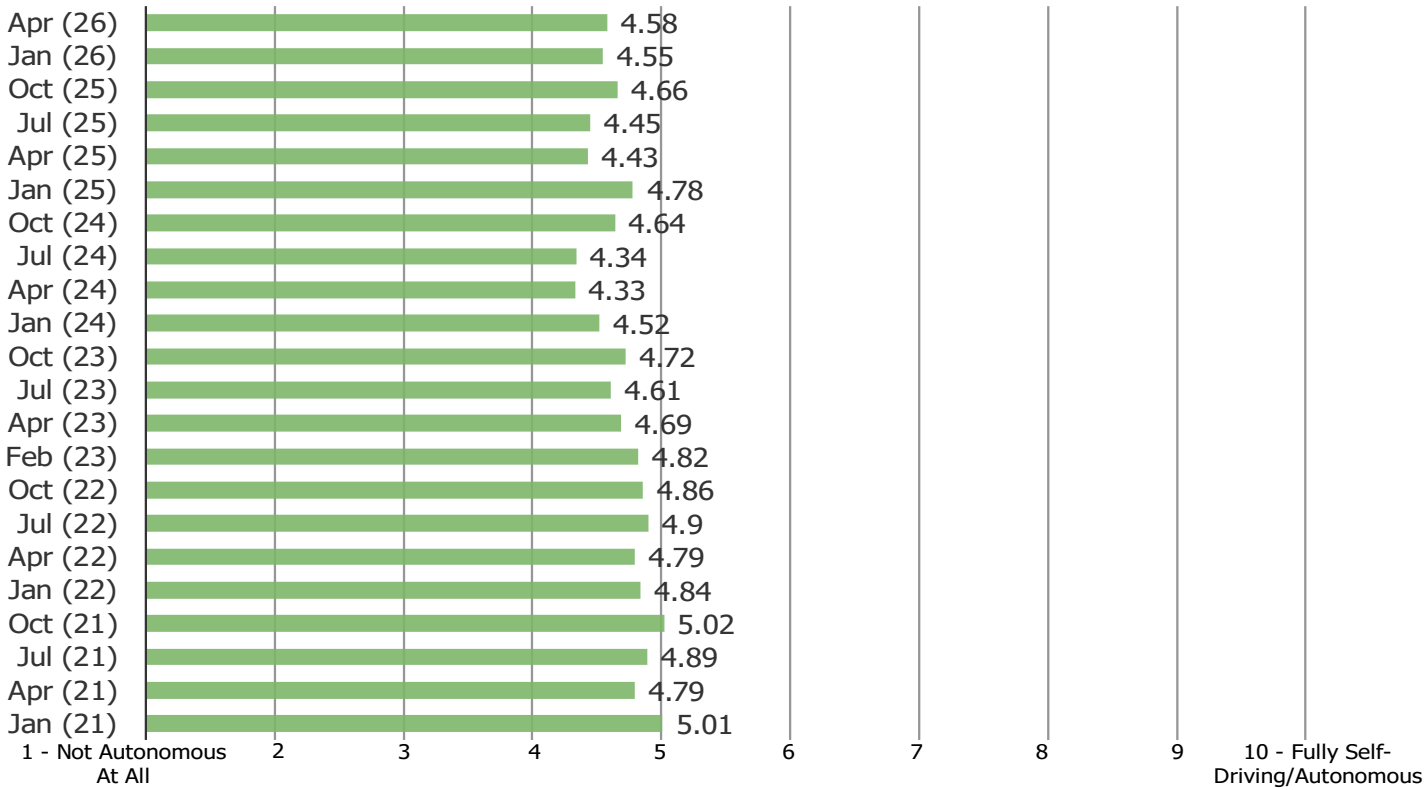
DO YOU CURRENTLY OWN/LEASE ONE OR MORE AUTOS THAT HAVE THE FOLLOWING FEATURES?

Posed to respondents who own/lease a car.



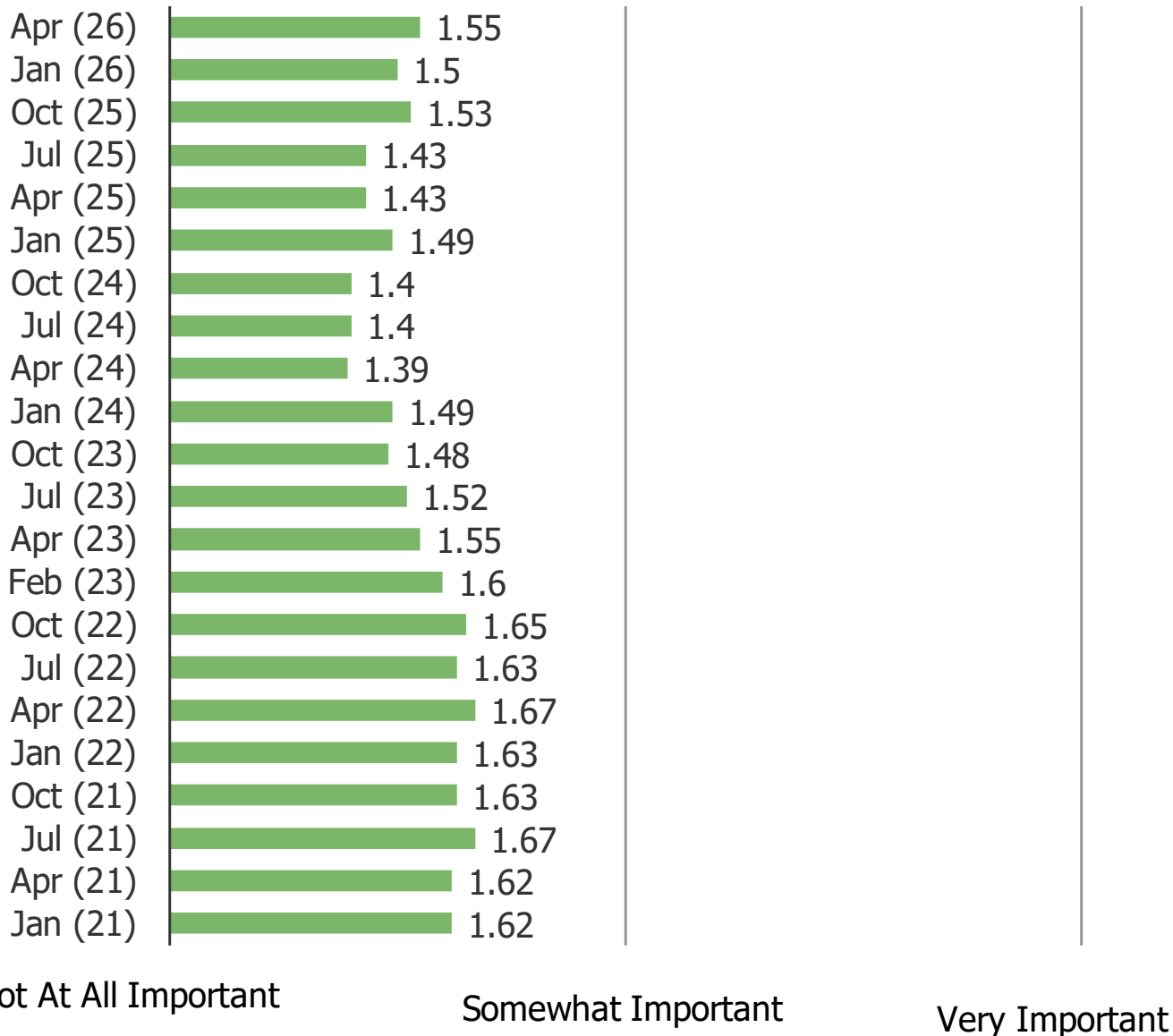
IN YOUR OPINION, HOW AUTONOMOUS WOULD THE IDEAL CAR/AUTOMOBILE BE?

Posed to respondents who own/lease a car.



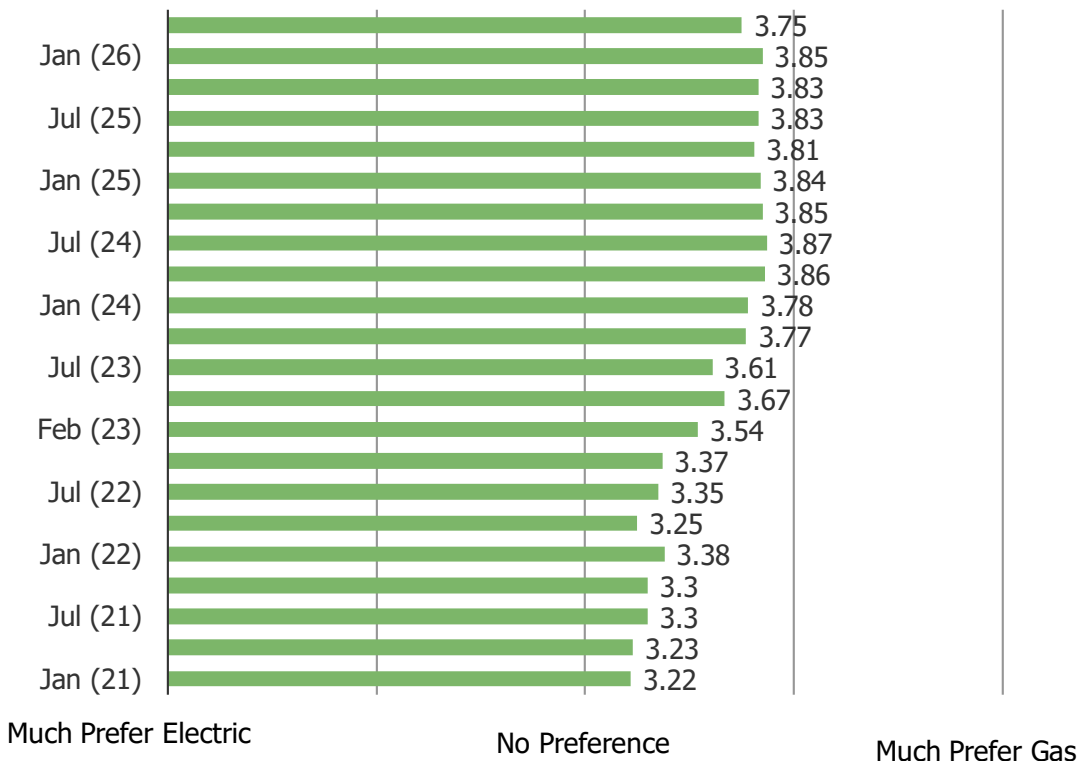
IF YOU WERE LOOKING TO GET A NEW CAR, HOW IMPORTANT WOULD IT BE FOR THE CAR TO BE AVAILABLE IN ELECTRIC?

Posed to respondents who own/lease a car.

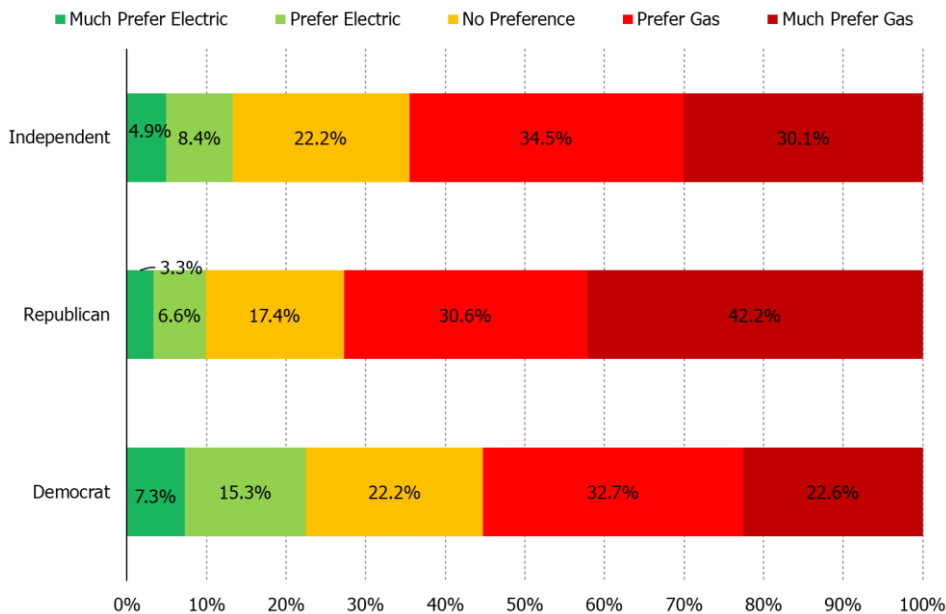


IF YOU WERE LOOKING TO GET A NEW CAR/AUTOMOBILE, WHICH WOULD YOU PREFER TO GET?

Posed to respondents who own/lease a car.

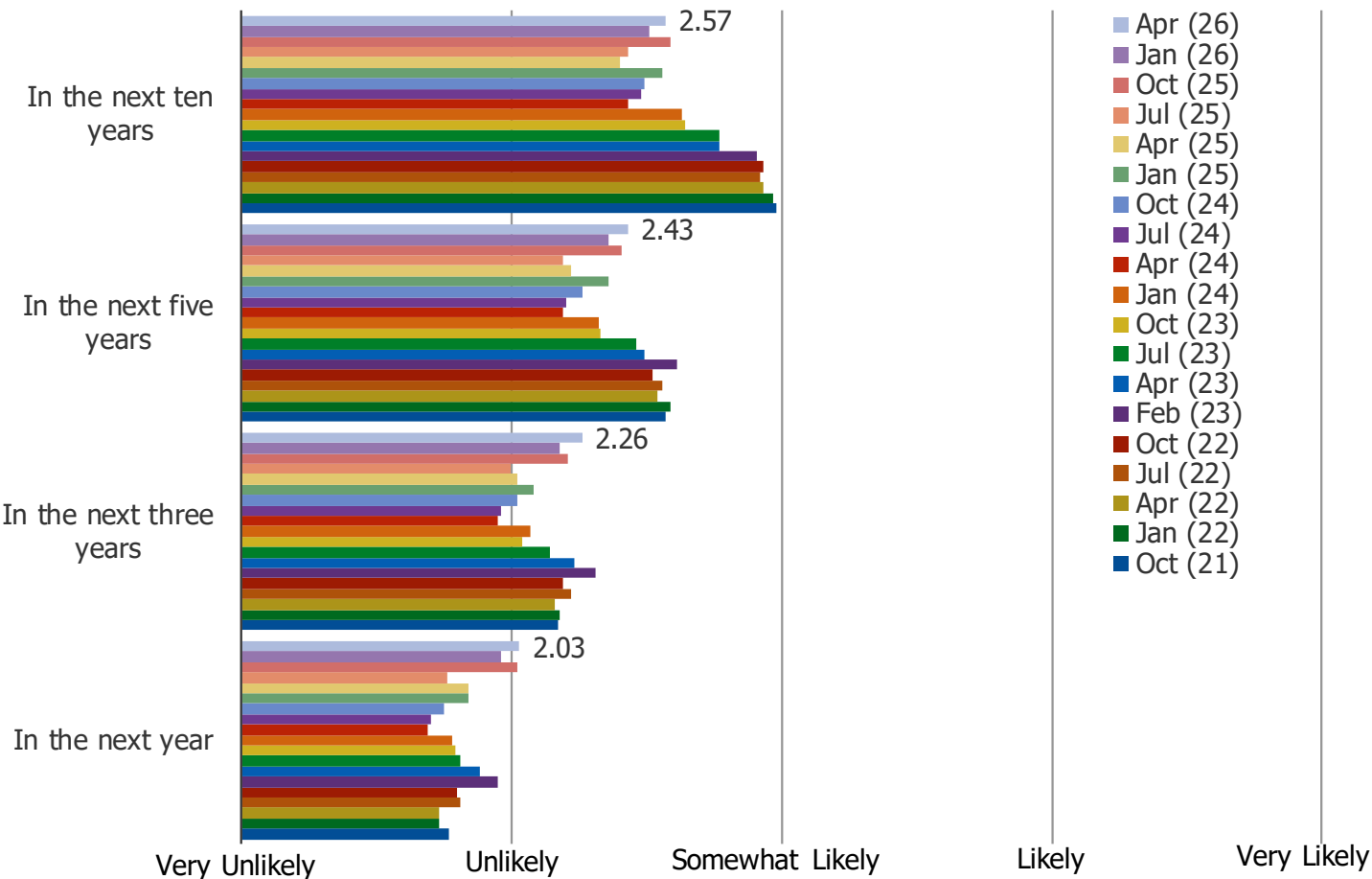


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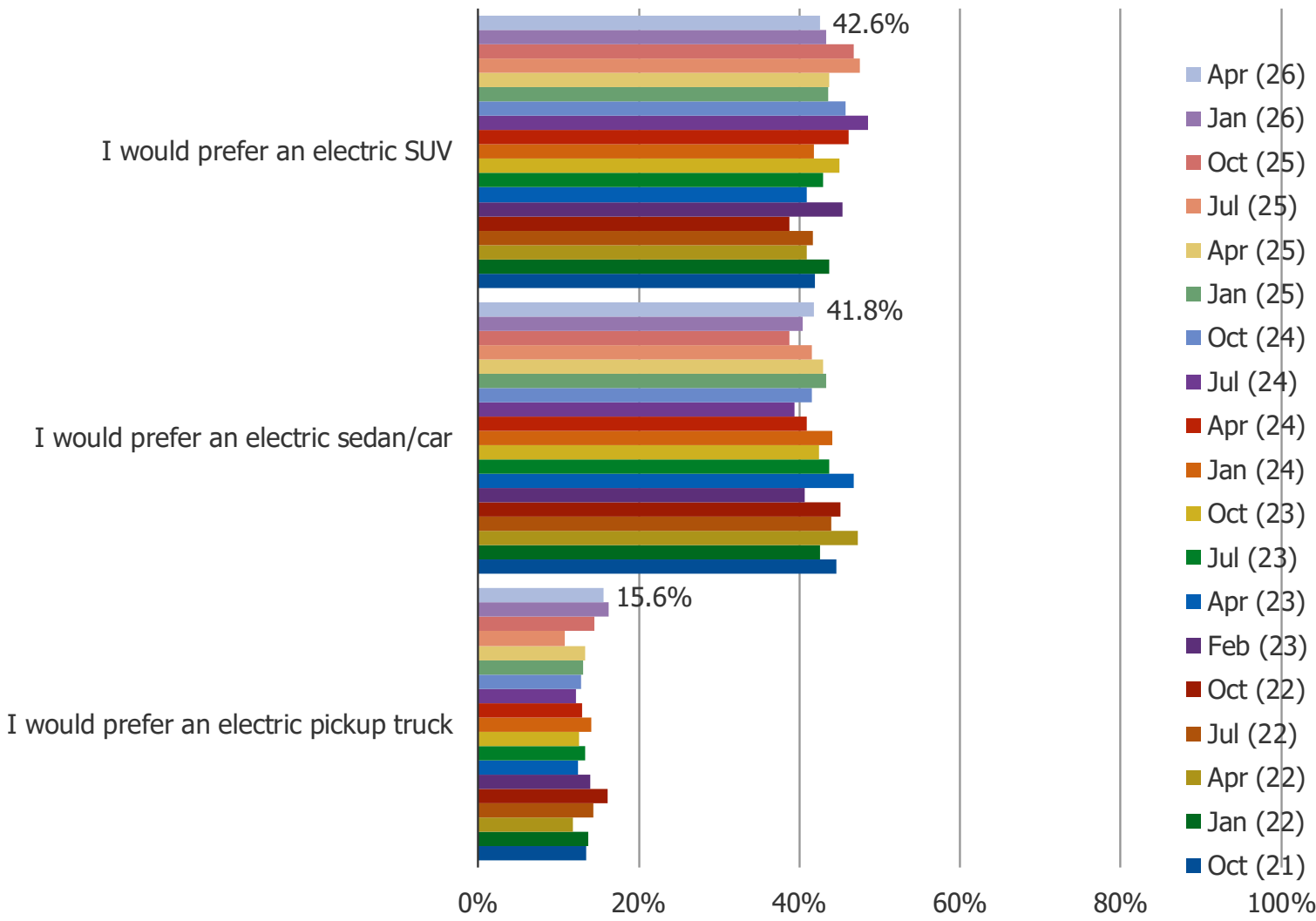
HOW LIKELY ARE YOU OWN OR LEASE AN ELECTRIC VEHICLE...

Posed to respondents who own/lease a car.



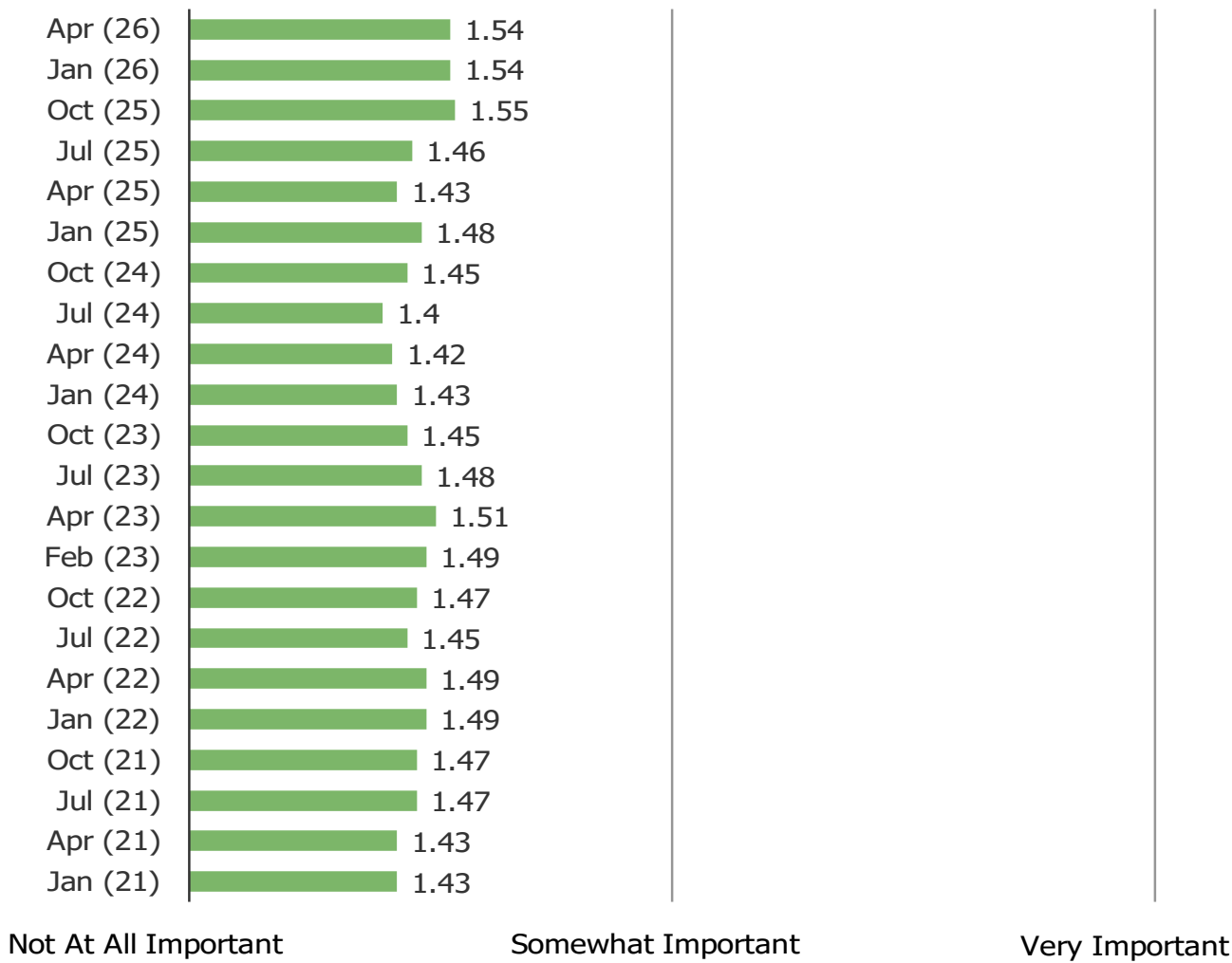
IF YOU WERE TO PURCHASE OR LEASE AN ELECTRIC VEHICLE, WOULD YOU PREFER...

Posed to respondents who own/lease a car.



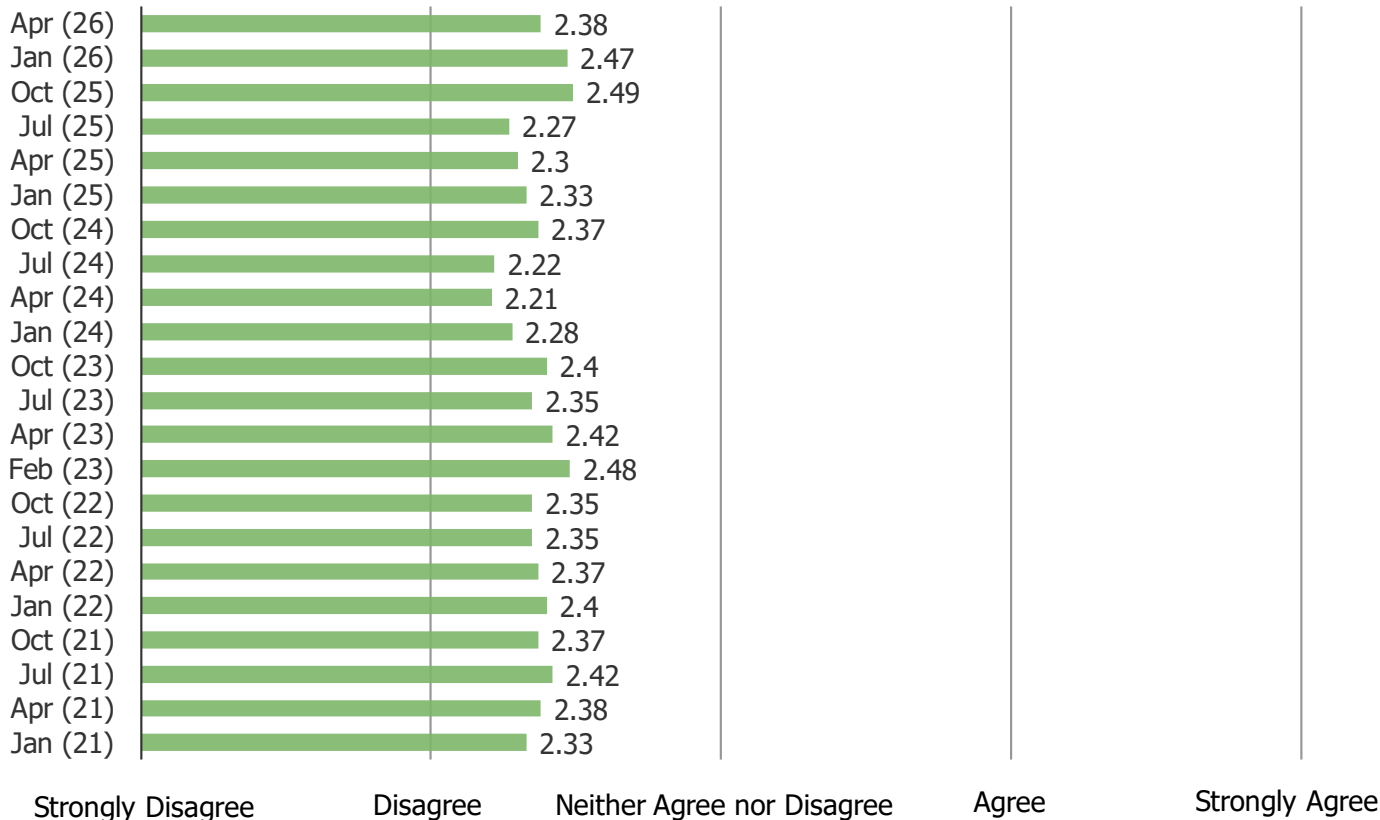
IF YOU WERE LOOKING TO GET A NEW CAR, HOW IMPORTANT WOULD IT BE FOR THE CAR TO HAVE SELF-DRIVING OR AUTONOMOUS DRIVING FEATURES?

Posed to respondents who own/lease a car.



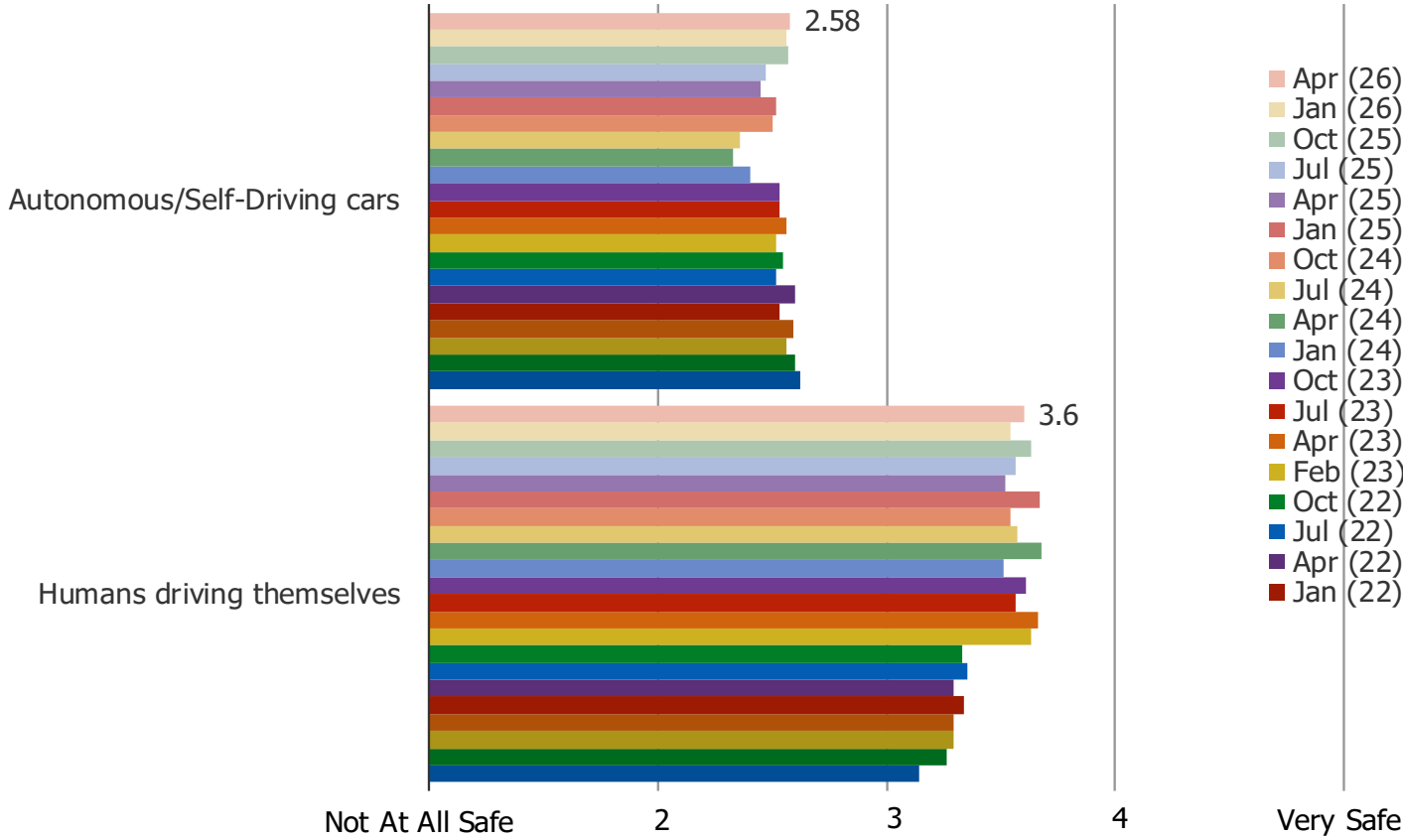
TO WHAT EXTENT DO YOU AGREE: "IT WOULD BE WORTH IT TO SPEND MORE ON A CAR/AUTO IN ORDER FOR IT TO HAVE SELF-DRIVING/AUTONOMOUS CAPABILITIES"

Posed to respondents who own/lease a car.



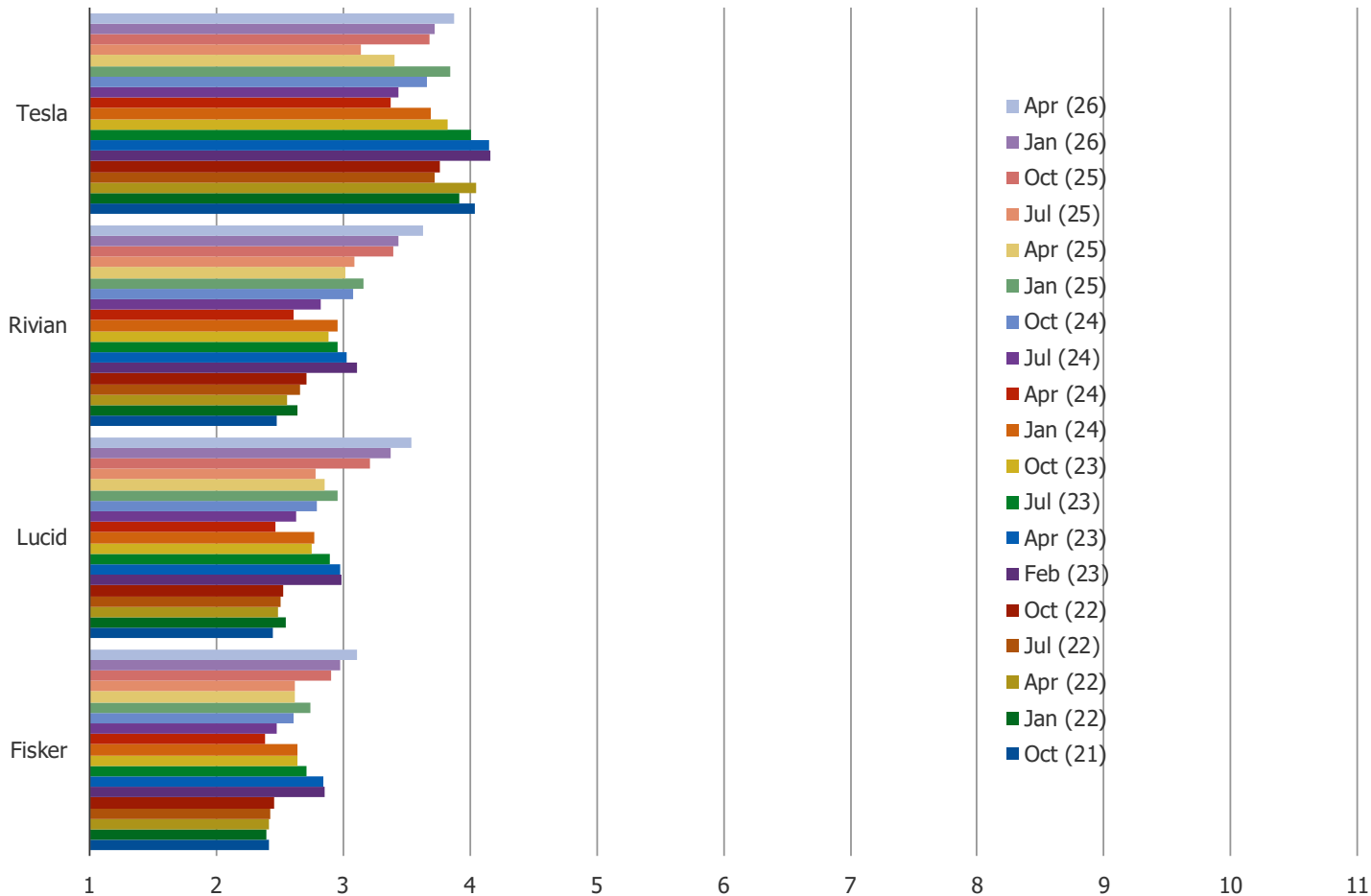
HOW WOULD YOU RATE HOW SAFE THE FOLLOWING ARE?

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?

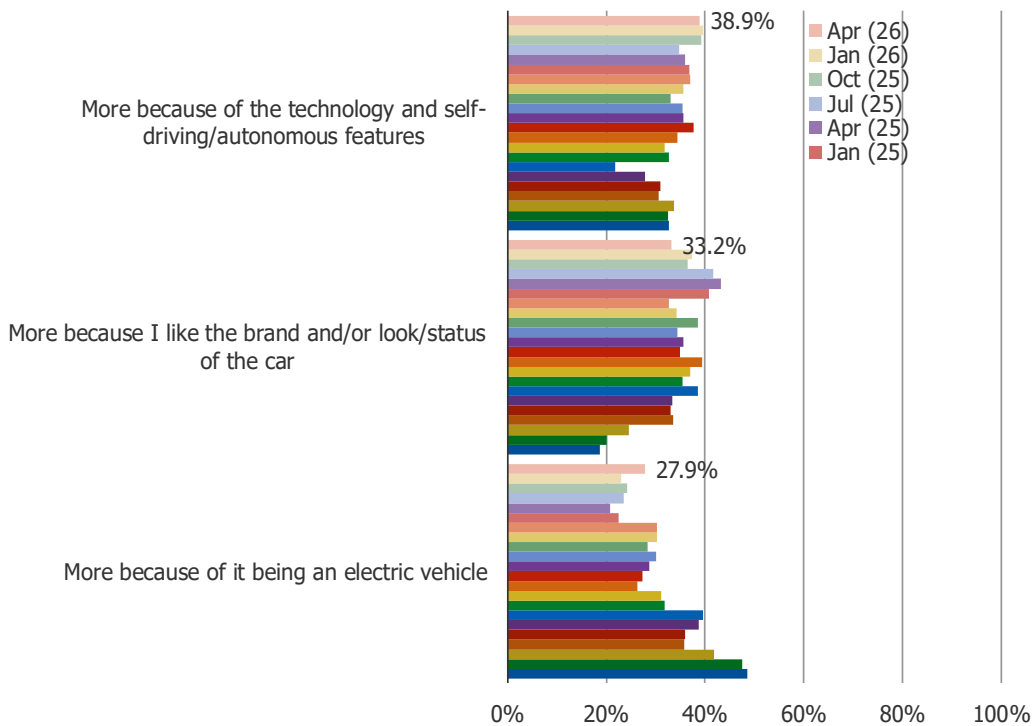
Posed to respondents who own/lease a car.



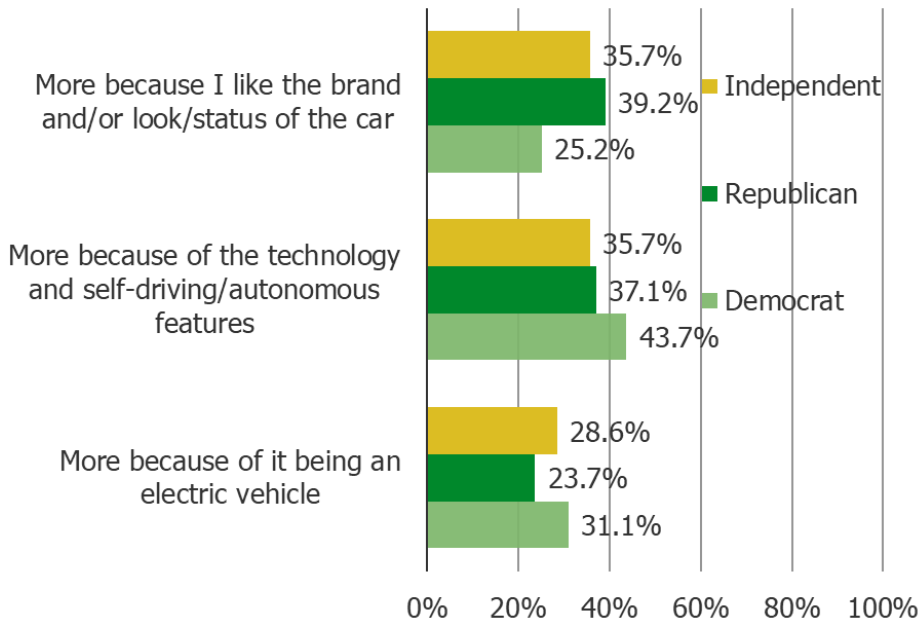
1- 11 scale in which 1 = no interest and 11 = very strong interest.

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.

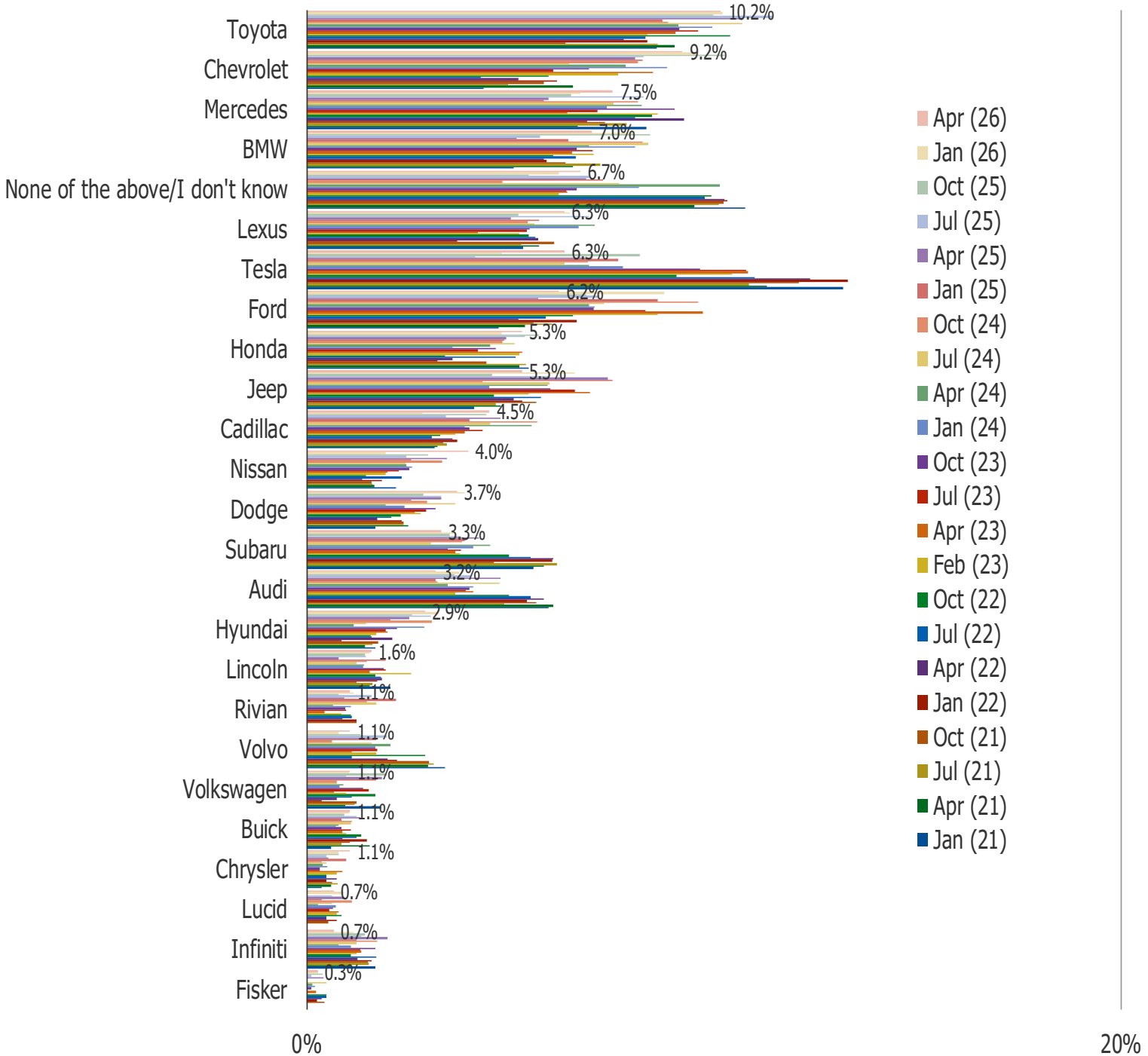


Cross-tabbing the above data...



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

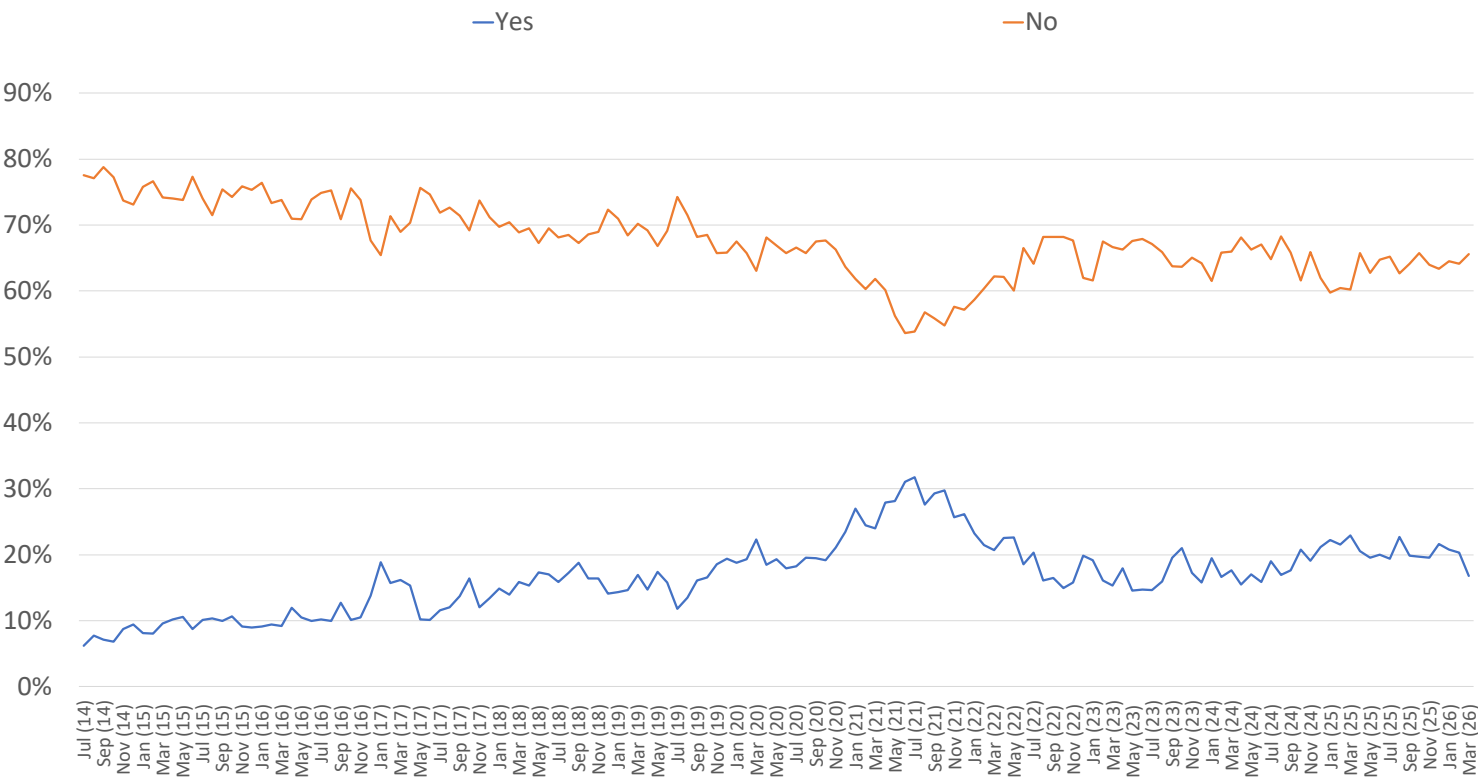
Posed to respondents who own/lease a car.



MONTHLY AUTO TRACKER QUESTIONS

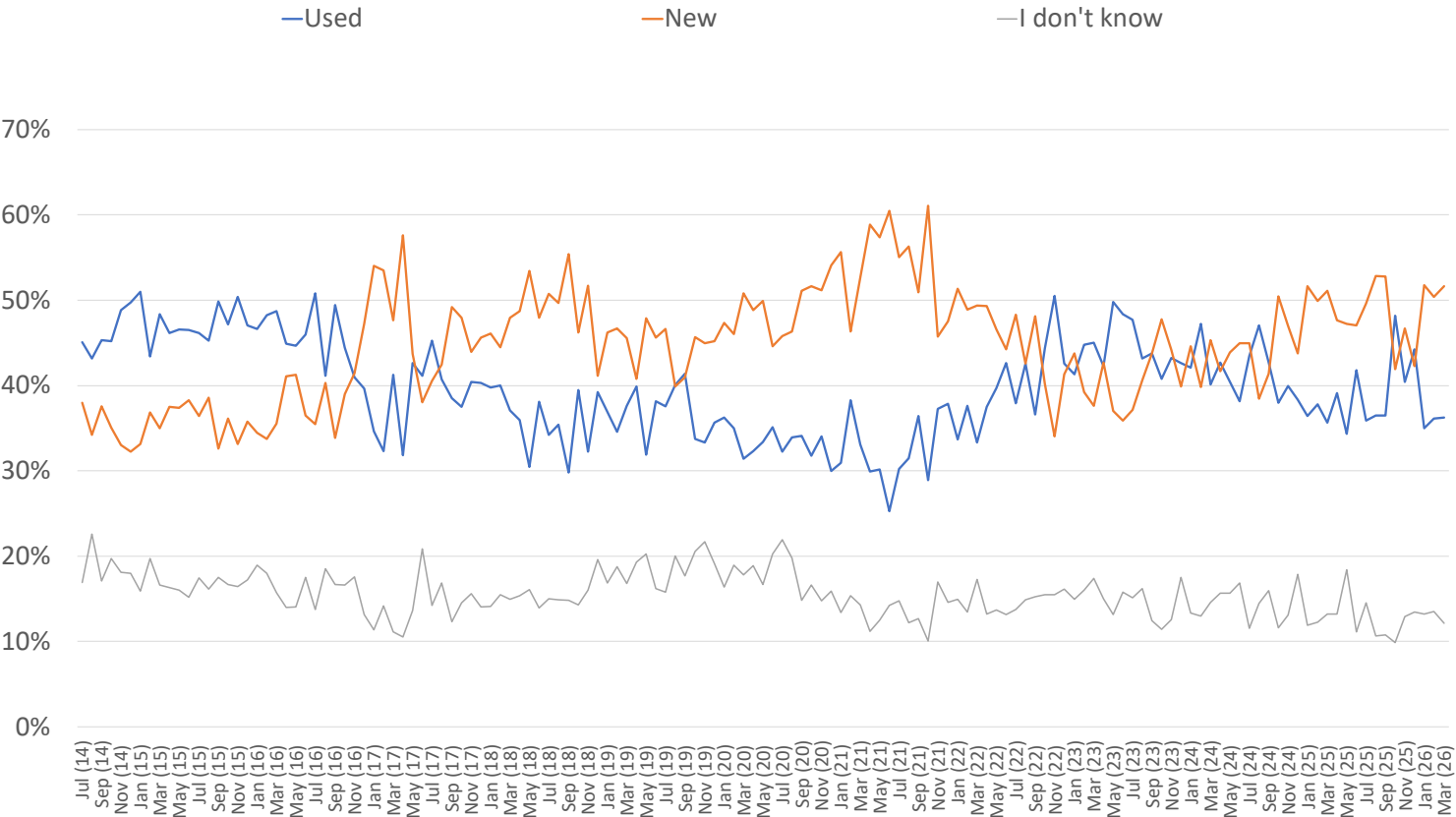
DO YOU PLAN TO PURCHASE/LEASE A VEHICLE IN THE NEXT SIX MONTHS?

Posed to all respondents.



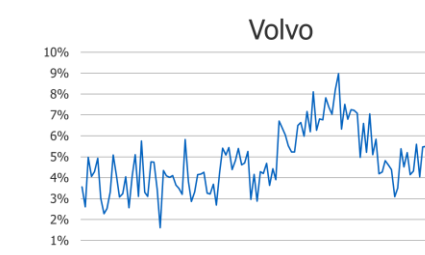
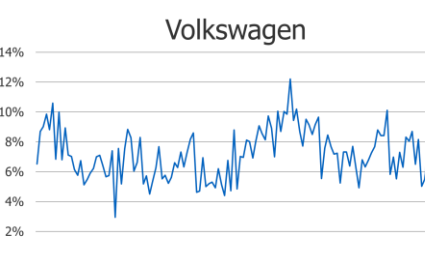
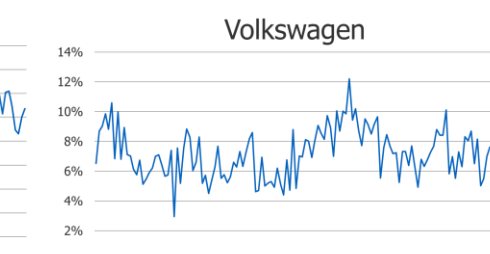
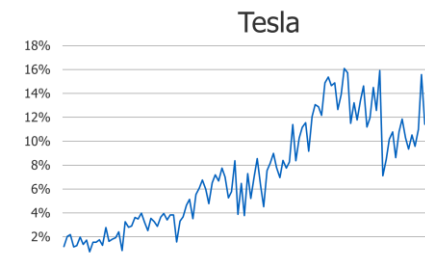
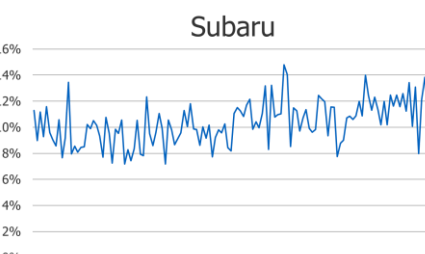
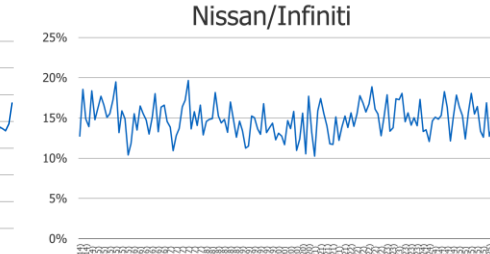
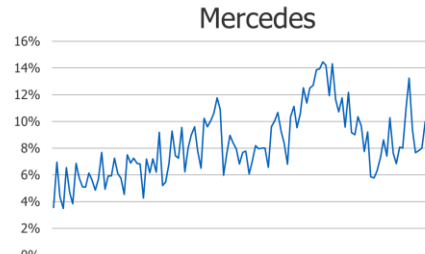
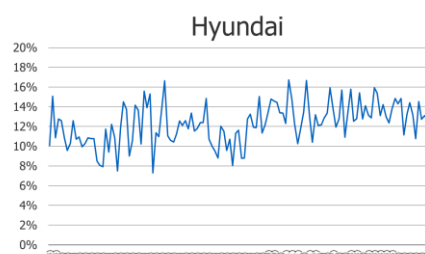
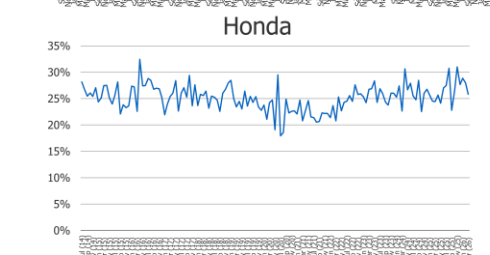
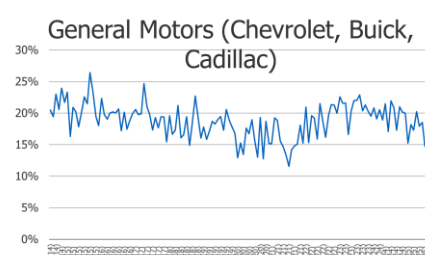
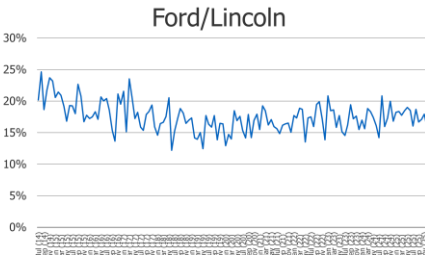
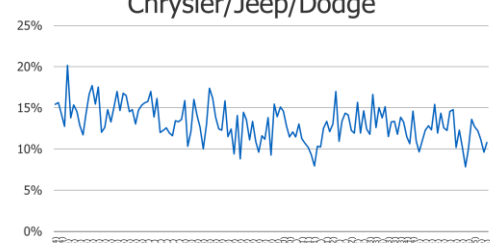
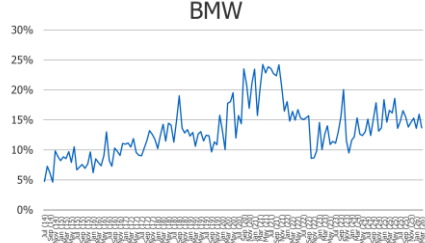
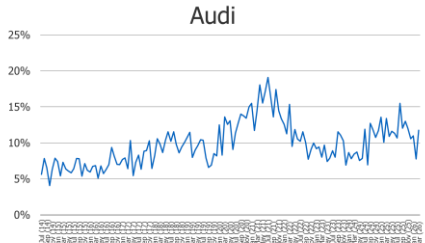
WOULD YOU BE MORE LIKELY TO PURCHASE A NEW OR USED VEHICLE?

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



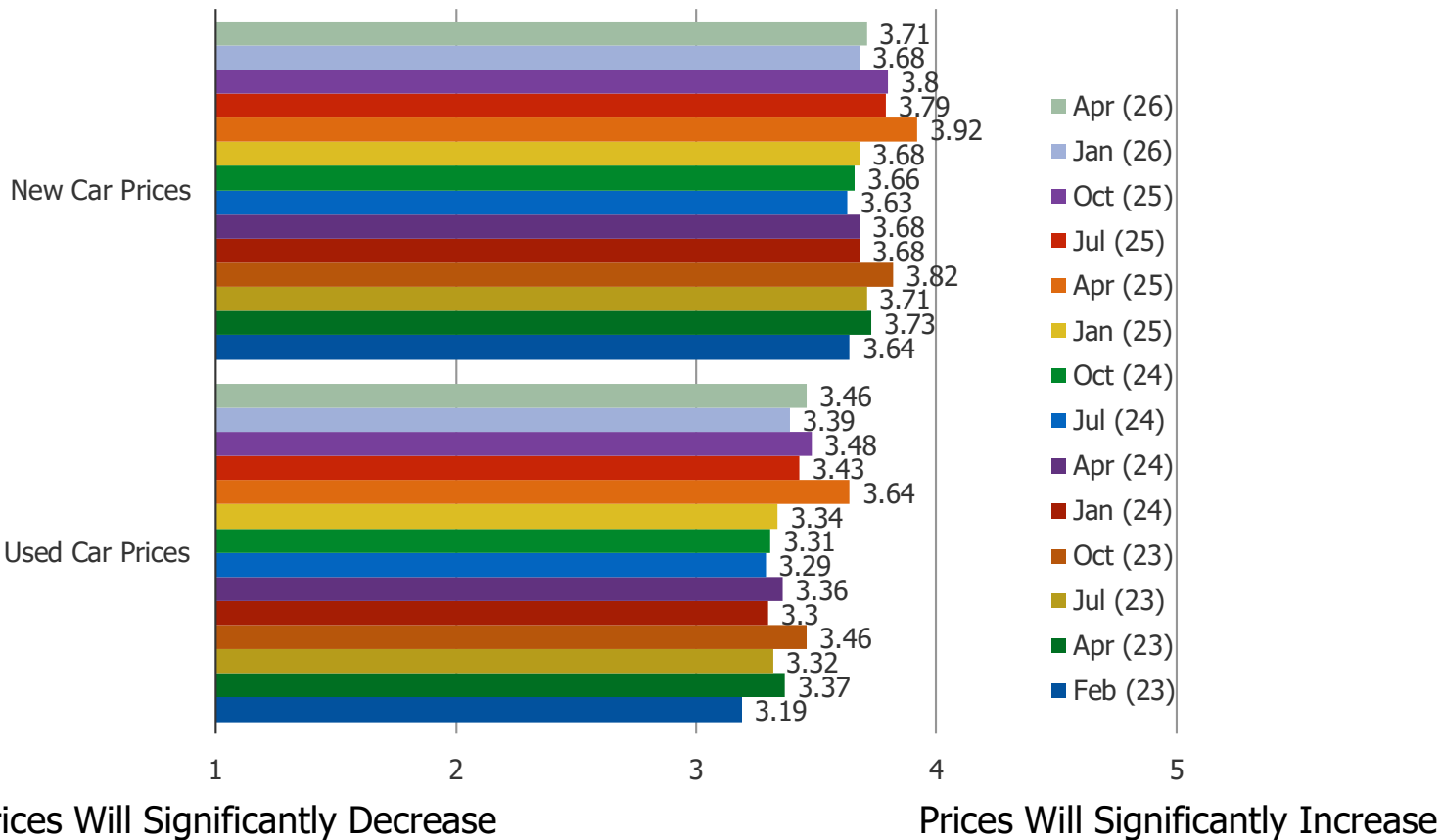
WHICH TYPES OF AUTOMOBILE WOULD YOU BE MOST LIKELY TO PURCHASE/LEASE IN THE NEXT SIX MONTHS?

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

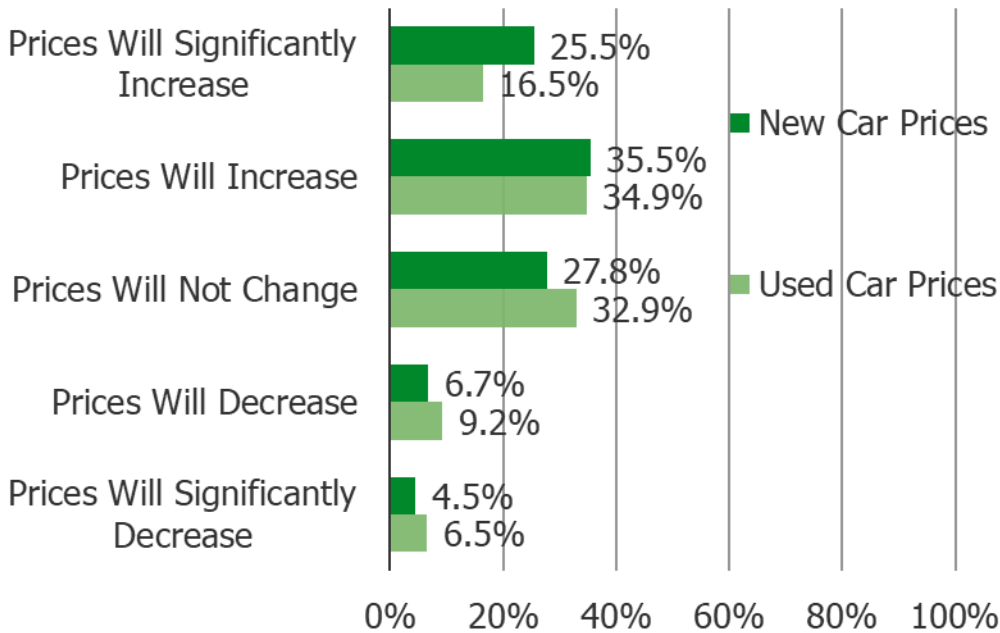


OVER THE NEXT 12 MONTHS, ARE YOU EXPECTING THE FOLLOWING TO CHANGE?

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

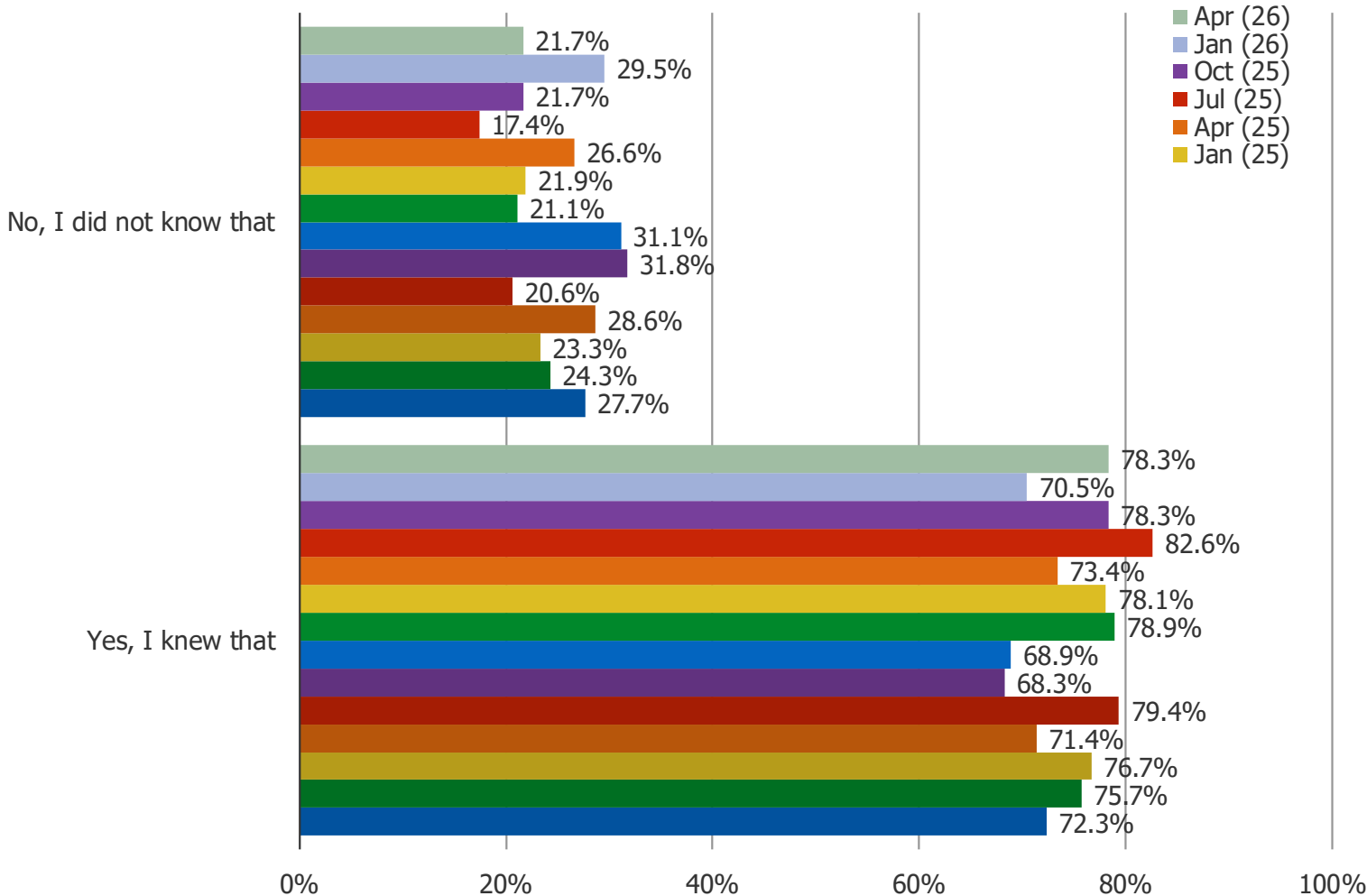


April 2026



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.

