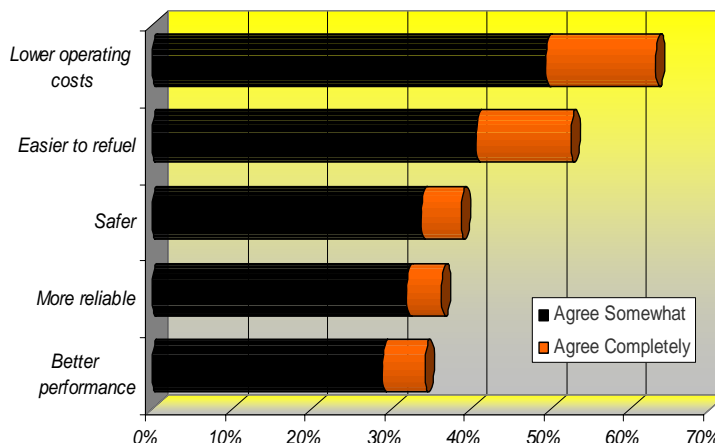




EVs FACE CHALLENGES BUT EV TURF ACCESSIBLE

On the heels of the hybrid rush come **all-electric vehicles (EVs)**. TNS asked 2,500 consumers their views on the **benefits of EVs** and what criteria suggest an **automaker could offer a successful EV**.

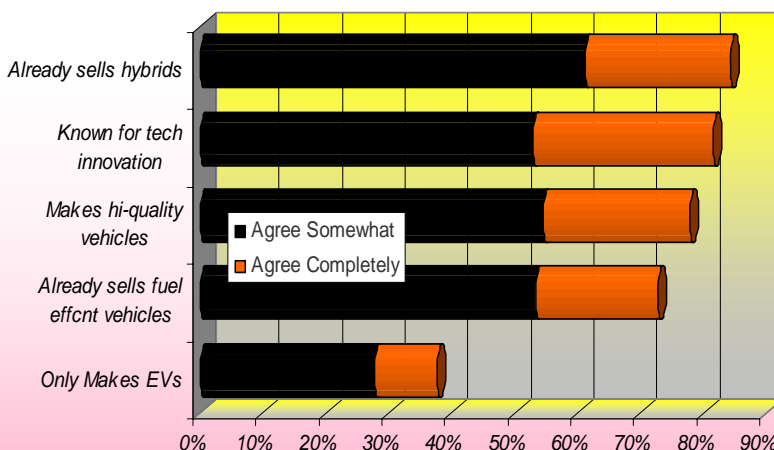
Compared to gasoline-powered vehicles, most consumers expect EVs to offer **lower operating costs** and were split on **refueling ease**. However, most expect gasoline vehicles to be **safer, more reliable**, and offer **better performance**.



Compared to gasoline-powered vehicles, do you agree with the following statements regarding electric vehicles?

Next Steps: Identify whether perceptions of worse safety, reliability, performance **will inhibit purchase of EVs**, and adjust product, positioning and messaging in response.

Consumers revealed several opportunities for automakers to **establish EV credibility**, and not all are related to pre-existing experience with electric propulsion. In fact, an automaker making only EVs was seen as the **least likely** to be successful. The results suggest an automaker could make the **leap right to EVs** without having first offered a hybrid as long as they are perceived to meet one of the other leading criteria.



Next Steps: Evaluate consumer brand perceptions on these criteria. **Test EV advertising before launch** to ensure that it leverages **pre-existing brand strengths** that play to EVs.

To what extent do you agree with the following on what makes an automaker capable of offering a successful EV?

TNS is the world's foremost provider of custom research and analysis, combining in-depth industry sector understanding with world-class expertise in the areas of new product development, segmentation and positioning research, brand and advertising research and stakeholder management. For additional information on these results contact Lincoln Merrihew of TNS Automotive (Lincoln.Merrihew@tns-global.com) or Melanie Mumper of TNS Marketing (Melanie.Mumper@tns-global.com)