The first-ever multi-state study of the electric vehicle shopping experience.
SIERRA CLUB EV INITIATIVE

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Sierra Club

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EV Initiative
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Connecticut Organizer
EV Initiative
Sierra Club
AGENDA

Purpose
Overview
Methodology
Key Findings
Recommendations
Q & A
PURPOSE
Asses what’s working well and what can be improved in the EV marketplace

“I couldn’t do a test drive because the key was lost. I was encouraged to purchase a non-electric vehicle instead.”
LOUISE A.,
NISSAN DEALERSHIP, CONNECTICUT

“EV salesman wasn’t working that day, so I was told to come again.”
STEPHEN B.,
HYUNDAI DEALERSHIP, CALIFORNIA

“There were only two EVs on the lot, and neither were charged with sufficient power for a test drive.”
KEVIN K.,
MERCEDES DEALERSHIP, CALIFORNIA

“I called the dealership and was told that they weren’t certified to sell EVs and that their sales department wasn’t equipped to handle them.”
NANCY P.,
FORD DEALERSHIP, MAINE

“The website said they had EVs in stock but they had none on the lot when I arrived.”
ALLISON R.,
VOLVO DEALERSHIP, MASSACHUSETTS

“The salesperson admitted he did not know too much about EVs. He said he had not received EV training.”
EUGENE C.,
VOLKSWAGEN DEALERSHIP, CALIFORNIA
OVERVIEW

- April, May, June 2016
- 174 volunteers
- 308 dealerships
- 13 automakers
- 10 states

California
Connecticut
Oregon
Massachusetts
Maine

Maryland
New Jersey
New York
Rhode Island
Vermont

<table>
<thead>
<tr>
<th>AUTOMAKER (some sell multiple EV models/brands)</th>
<th>TOTAL EV sales Jan-June, 2016</th>
<th>TOTAL Overall U.S. Car Model Sales</th>
<th>PERCENT EV sales of all U.S. Auto Sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>TESLA</td>
<td>19,030</td>
<td>19,030</td>
<td>100%</td>
</tr>
<tr>
<td>GENERAL MOTORS (Chevy, Cadillac)</td>
<td>12,803</td>
<td>1,438,915</td>
<td>0.84%</td>
</tr>
<tr>
<td>FORD</td>
<td>10,906</td>
<td>1,345,170</td>
<td>0.81%</td>
</tr>
<tr>
<td>BMW</td>
<td>6,214</td>
<td>153,436</td>
<td>4.05%</td>
</tr>
<tr>
<td>NISSAN</td>
<td>5,793</td>
<td>798,114</td>
<td>0.73%</td>
</tr>
<tr>
<td>VW AG (Audi, Volkswagen)</td>
<td>3,397</td>
<td>247,135</td>
<td>1.38%</td>
</tr>
<tr>
<td>FCA (Fiat, Chrysler)</td>
<td>2,220</td>
<td>1,152,259</td>
<td>0.19%</td>
</tr>
<tr>
<td>HYUNDAI</td>
<td>1,360</td>
<td>374,060</td>
<td>0.36%</td>
</tr>
<tr>
<td>PORSCHE</td>
<td>1,322</td>
<td>26,708</td>
<td>4.95%</td>
</tr>
<tr>
<td>VOLVO</td>
<td>1,006</td>
<td>36,653</td>
<td>2.75%</td>
</tr>
<tr>
<td>DAIMLER AG (Mercedes, Smart)</td>
<td>740</td>
<td>181,132</td>
<td>0.41%</td>
</tr>
<tr>
<td>KIA</td>
<td>613</td>
<td>328,327</td>
<td>0.19%</td>
</tr>
<tr>
<td>TOYOTA</td>
<td>42</td>
<td>1,197,800</td>
<td>0.00%</td>
</tr>
<tr>
<td>MITSUBISHI</td>
<td>20</td>
<td>51,934</td>
<td>0.04%</td>
</tr>
<tr>
<td>HONDA</td>
<td>0</td>
<td>792,355</td>
<td>0%</td>
</tr>
<tr>
<td>JAGUAR, LAND ROVER</td>
<td>0</td>
<td>47,639</td>
<td>0%</td>
</tr>
<tr>
<td>SUBARU</td>
<td>0</td>
<td>279,458</td>
<td>0%</td>
</tr>
<tr>
<td>MAZDA</td>
<td>0</td>
<td>145,354</td>
<td>0%</td>
</tr>
</tbody>
</table>
METHODOLOGY

- Email, phone and social media outreach
- Web-tool designed by Sierra Club & housed on website
- Volunteers watched short video presentation
- Dealerships were removed when surveyed
METHODOLOGY

Volunteers were asked to observe the following:

1. Availability
2. Charged batteries
3. Visibility
4. Salespeople enthusiasm
5. Salespeople knowledge of EV tech/charging
6. Salespeople knowledge of credits/incentives
**KEY FINDINGS**

Our volunteers were **2 1/2 times** more likely to find no EV on a dealership lot in the nine other ZEV states than they were in California.

Among the dealerships our volunteers visited that had at least one EV, the **average number of EVs on lots in California was nearly twice the average** number on lots in the nine other ZEV states.

Of our respondents who asked to test drive an EV, they were told at **14%** of the dealerships that the car was **not sufficiently charged**, including at **22%** of the Chevy dealerships and at **21%** of the Ford dealerships visited.
Of the visits to dealerships with at least one EV on the lot, volunteers indicated that only **about 50% of the** salespeople they spoke with provided information on how to fuel the EV while traveling.

Of the visits to dealerships with at least one EV on the lot, volunteers found that **42% of the time EVs were either “not prominently displayed” or were only “somewhat prominently displayed.”**

Of the visits to dealerships with at least one EV on the lot, volunteers indicated that **about 33% of the time the salesperson did not discuss the federal and state tax credits and rebates** available to lower the cost of an EV.
**KEY FINDINGS**

**Knowledge of rebates/tax credits**

Averages based on five-point scale, where 1 = poor and 5 = very knowledgeable

<table>
<thead>
<tr>
<th>Category</th>
<th>Score</th>
<th>Knowledge of Rebates/Tax Credits</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FULL SPEED AHEAD</strong></td>
<td>4–5</td>
<td>Tesla, Fiat</td>
</tr>
<tr>
<td><strong>GOING SLOWLY</strong></td>
<td>3–3.9</td>
<td>Audi, BMW, Chevy, Ford, Mercedes, Nissan, Porsche, Volkswagen</td>
</tr>
<tr>
<td><strong>BARELY MOVING</strong></td>
<td>2–2.9</td>
<td>Volvo, Hyundai, Kia</td>
</tr>
<tr>
<td><strong>FULL SPEED AHEAD</strong></td>
<td>4–5</td>
<td>Oregon</td>
</tr>
<tr>
<td><strong>GOING SLOWLY</strong></td>
<td>3–3.9</td>
<td>California, Connecticut, Massachusetts, Maryland, New York</td>
</tr>
<tr>
<td><strong>BARELY MOVING</strong></td>
<td>2–2.9</td>
<td>Maine, New Jersey, Vermont</td>
</tr>
</tbody>
</table>

*among dealerships/stores with at least one EV on the lot.*
### KEY FINDINGS

**Prominent display of plug-in models**

Averages based on percentage of “yes” responses

<table>
<thead>
<tr>
<th>Speed Level</th>
<th>Percentage</th>
<th>Prominent Models</th>
</tr>
</thead>
<tbody>
<tr>
<td>FULL SPEED AHEAD</td>
<td>80–100%</td>
<td>Tesla</td>
</tr>
<tr>
<td>GOING SLOWLY</td>
<td>40–79%</td>
<td>Audi, BMW, Chevy, Fiat, Ford, Kia, Nissan, Porsche, Volkswagen, Volvo</td>
</tr>
<tr>
<td>BARELY MOVING</td>
<td>&lt;40%</td>
<td>Hyundai, Mercedes</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Speed Level</th>
<th>Percentage</th>
<th>Region(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>FULL SPEED AHEAD</td>
<td>80–100%</td>
<td>None</td>
</tr>
<tr>
<td>GOING SLOWLY</td>
<td>40–79%</td>
<td>California, Connecticut, Maryland, Massachusetts, New York, Oregon, Vermont</td>
</tr>
<tr>
<td>BARELY MOVING</td>
<td>&lt;40%</td>
<td>New Jersey</td>
</tr>
</tbody>
</table>

*among dealerships/stores with at least one EV on the lot.*
KEY FINDINGS

Overall EV Shopping Experience

[Bar chart showing satisfaction levels for various car brands like Tesla, BMW, Chevy, Nissan, Audi, Kia, Fiat, Ford, Mercedes, Volkswagen, Porsche, Hyundai, and Volvo, with categories for Positive, Mediocre, and Negative satisfaction.]
RECOMMENDATIONS

For government agencies...

• Create and expand consumer incentives, such as purchase/lease rebates, to keep EVs within grasp of middle-class Americans. Additional incentives should be provided to low-income residents.

• Provide grants and incentives for businesses, municipalities, and government agencies to invest in EV fleets and charging infrastructure.

• Educate the public about EVs and EV incentives.

• Work with dealer groups on salesperson training programs.
RECOMMENDATIONS
For auto dealers …

• Secure more EV inventory from their affiliated automakers.

• Provide regular trainings to salespeople on EVs, charging technology, federal and state rebates and incentives, tax credits, and sales strategies.

• Seek out EV certification for their dealership and salespeople with one or more designated as EV Specialists.

• Display EVs prominently, such as under special canopies, in the showroom and along charging stations.

• Recognize and reward high-performing EV salespeople.

• Work with local pro-EV groups to participate in test-drive events.
RECOMMENDATIONS

For automakers ... 

• Increase EV inventory for more dealerships in more states.

• Provide dealers with current and detailed info on federal and state rebates and incentives, tax credits, and utility discounts.

• Streamline the process and lower or remove the costs of EV certification for dealerships and their salespeople.

• Significantly increase national EV marketing and advertising.

• Recognize and reward high-performing EV dealerships.
Questions?

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