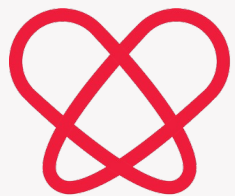


Coltura Superuser Survey

Key Findings on Superusers
Feb. 2023



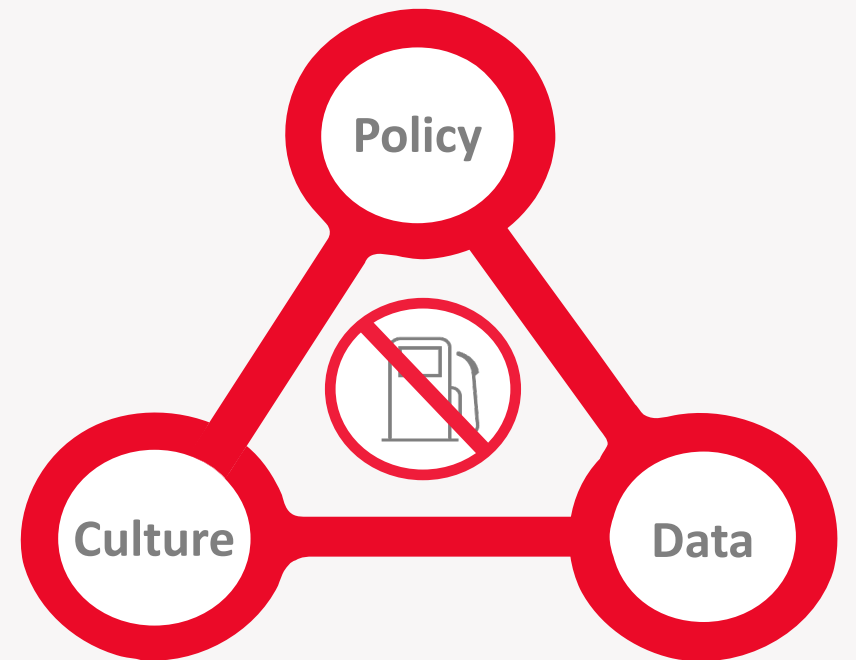
COLTURA

Moving Beyond Gasoline



About COLTURA

MISSION: To improve climate, health, and equity by accelerating the **shift beyond gasoline to cleaner alternatives.**



Background

- Survey was conducted online through Survey Monkey in November 2022
- A total of 593 Californian gasoline superusers were identified

Topline Findings (1)

- The biggest effects gas spending has had on people's lives was the need to seek out cheaper gas (40%), cutting discretionary spending (38%) and feeling stressed/sad/depressed (27%).
- Less than a fifth (17%) overall said they know a lot about EVs. People who have greater familiarity with EVs tend to be male, age 35-54, and have an income over \$75K (all significant at least at 10% in a Chi-Square test for differences).
- About one-third know someone with an EV (36%), have ridden in an EV (33%), and/or have noticed EVs in their community (33%).
- People who are males, aged 18-54, and have an income above \$75K are more likely to have already owned or leased an EV (all significant at least at 10% in a Chi-Square test for differences).
- Two-thirds (66%) have a positive sentiment about EVs, with most of the remainder (23%) holding a neutral opinion.
- Seen as the biggest positives about EVs are reduced air pollution (46%), lower emissions (38%), lower cost to operate (35%), and advanced technology (34%).
- Viewed as the biggest negatives about EVs are battery lifespan (38%), range on a charge (36%), and vehicle cost (36%).

Topline Findings (2)

- Overall, 23% say they are likely to replace their current gas vehicle with an EV in the next 12 months. Segments most likely to replace their current vehicle with an EV in the next 12 months are those who've driven or ridden in an EV, rideshare/delivery drivers, people with \$75K+ annual income, aged 35-54, males and those with older vehicles (all significant at least at 5% in a Chi-Square test for differences). Notably, also drivers with high fuel efficiency are more likely to switch.
- Vehicle cost is by far the biggest barrier to switching to an EV in the next 12 months (37%).
- Most enticing to switch to an EV in the next 12 months are \$50/month savings (22%), 200K mile battery life (19%), and a vehicle cost below an equivalent gas vehicle (19%).
- Half of the respondents said the purchase price of an EV would need to be less than \$30K for them to switch to an EV in the next 12 months.
- Those who said they wouldn't switch to an EV in the next 12 months under any circumstances most often said the reason is that they like their gas car (47%) and they could never afford an EV (33%).
- Almost eight in ten (78%) said they are aware of EV charging where they live, work, shop, dine or travel. These drivers are also more likely to switch to an EV (statistically significant at 1%).
- Nearly half (44%) said they would switch to public transit if it were more convenient than driving.

Vehicle Characteristics

| Vehicle Type | 593 (100%) |
|----------------|------------|
| Gas-powered | 90.4% |
| Diesel-powered | 9.6% |

| Ownership | 592 (100%) |
|--|------------|
| I own it outright | 73.5% |
| I am financing it (paying on an auto loan) | 22.6% |
| I lease it | 2% |
| Other (please specify) | 1.9% |

| Average MPG | 593 (100%) |
|--------------|------------|
| Less than 10 | 4.1% |
| 10 - 14 | 9.4% |
| 15 - 19 | 17.2% |
| 20 - 24 | 22.1% |
| 25 - 29 | 18.4% |
| 30 - 34 | 12.8% |
| 35 - 39 | 7.8% |
| 40 - 44 | 4.6% |
| 45 - 49 | 1.2% |
| 50+ | 2.5% |

| Average VMT | 593 (100%) |
|------------------------|------------|
| 15,000 to 19,999 miles | 38.1% |
| 20,000 to 24,999 miles | 27% |
| 25,000 to 29,999 miles | 12.3% |
| 30,000 miles or more | 22.6% |

Driving Characteristics

| Driving Purpose | 592 (100%) |
|---|---------------|
| I drive for my work | 16.9% |
| I drive to get to and from work | 30.7% |
| Both, I drive for my work and to get to and from work | 39% |
| Neither | 13.3% |

| % of Work Driving for Ride-Hailing or Delivery (Among Those Who Drive for Work) | 100 (100%) |
|---|---------------|
| 75% to 100% | 32% |
| 50% to 74% | 31% |
| 25% to 49% | 11% |
| Less than 25% | 6% |
| None | 20% |

| Miles Driven on Typical Workday | 79 (100%) |
|---------------------------------|--------------|
| Less than 50 | 76% |
| 50 to 100 | 7.6% |
| 101 to 150 | 3.8% |
| 151 to 200 | 1.3% |
| 201 to 250 | 0% |
| 251 to 300 | 0% |
| 301 to 350 | 1.3% |
| More than 350 | 2.5% |
| It varies widely | 7.6% |

| Miles Driven on Typical Non-Workday | 508 (100%) |
|-------------------------------------|---------------|
| Less than 50 | 51.2% |
| 50 to 100 | 22.6% |
| 101 to 150 | 10.8% |
| 151 to 200 | 5.3% |
| 201 to 250 | 4.5% |
| 251 to 300 | 2.4% |
| More than 300 | 2.4% |
| It varies widely | 0.8% |

| Where Vehicle is Parked Overnight | 585 (100%) |
|--|---------------|
| A personal driveway or personal garage | 69.6% |
| A shared garage or parking lot | 18.5% |
| On the street | 10.9% |
| Other | 1% |

Spending Characteristics

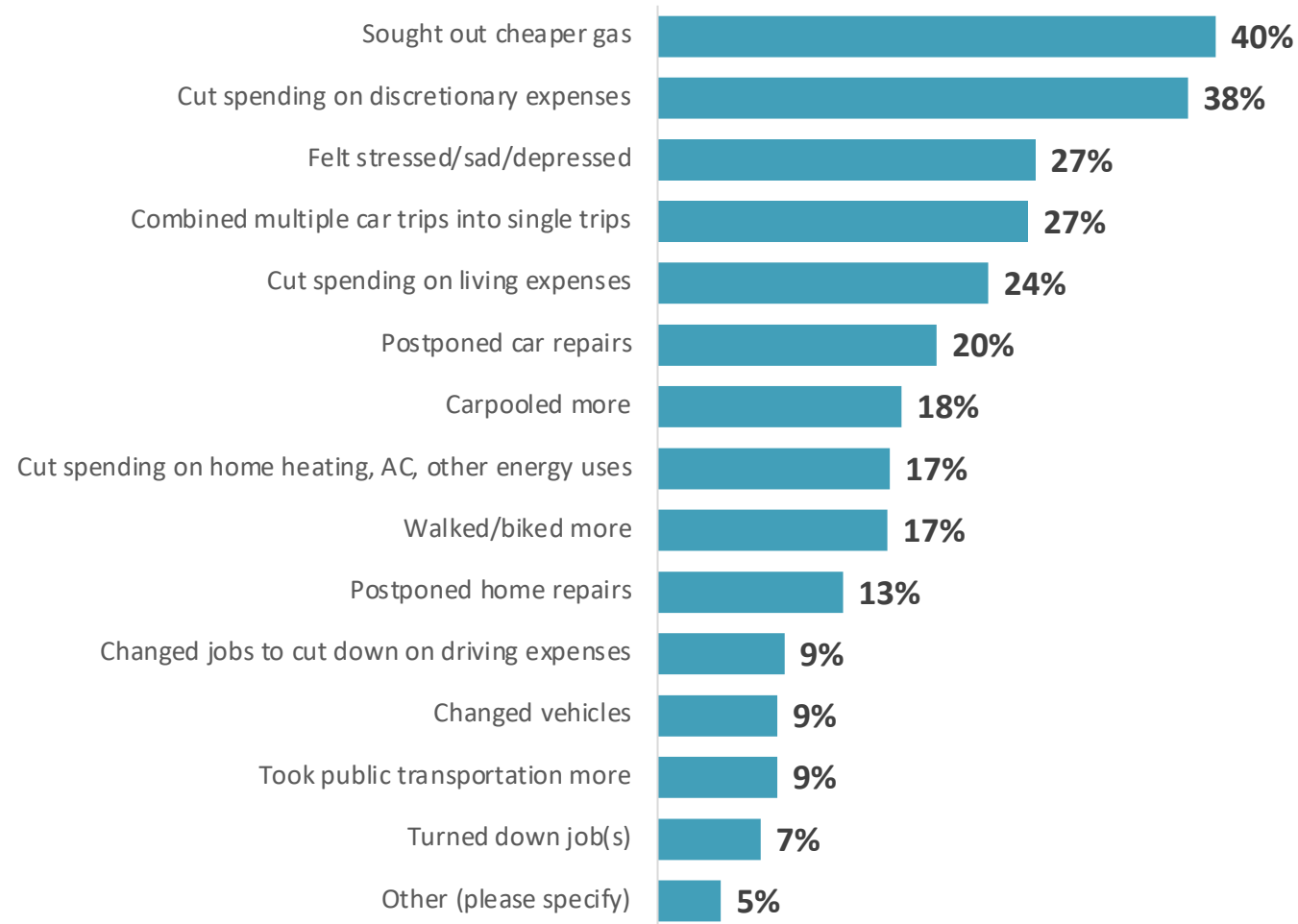
| Monthly Spending on Gasoline | 585 (100%) |
|-------------------------------------|-------------------|
| \$100/month or less | 12.5% |
| \$101 to \$300/month | 37.4% |
| \$301 to \$500/month | 27.7% |
| \$501 to \$700/month | 12.7% |
| \$701 to \$1,000/month | 6% |
| More than \$1,000/month | 3.8% |

| % of Income spent on gasoline | 580 (100%) |
|--------------------------------------|-------------------|
| Less than 5% | 16.2% |
| 5-9% | 21.9% |
| 10-19% | 30.3% |
| 20-29% | 22.6% |
| 30-39% | 5.7% |
| 40% or more | 3.3% |

| Annual Spending on Vehicle Maintenance | 577 (100%) |
|---|-------------------|
| \$500 or less | 24.8% |
| \$501 to \$1,000 | 22.7% |
| \$1,001 to \$2,000 | 19.8% |
| \$2,001 to \$3,000 | 11.1% |
| \$3,001 to \$4,000 | 5.6% |
| \$4,001 to \$5,000 | 5.9% |
| \$5,001 to \$6,000 | 4.5% |
| \$6,001 to \$7,000 | 2.4% |
| More than \$7,000 | 3.3% |

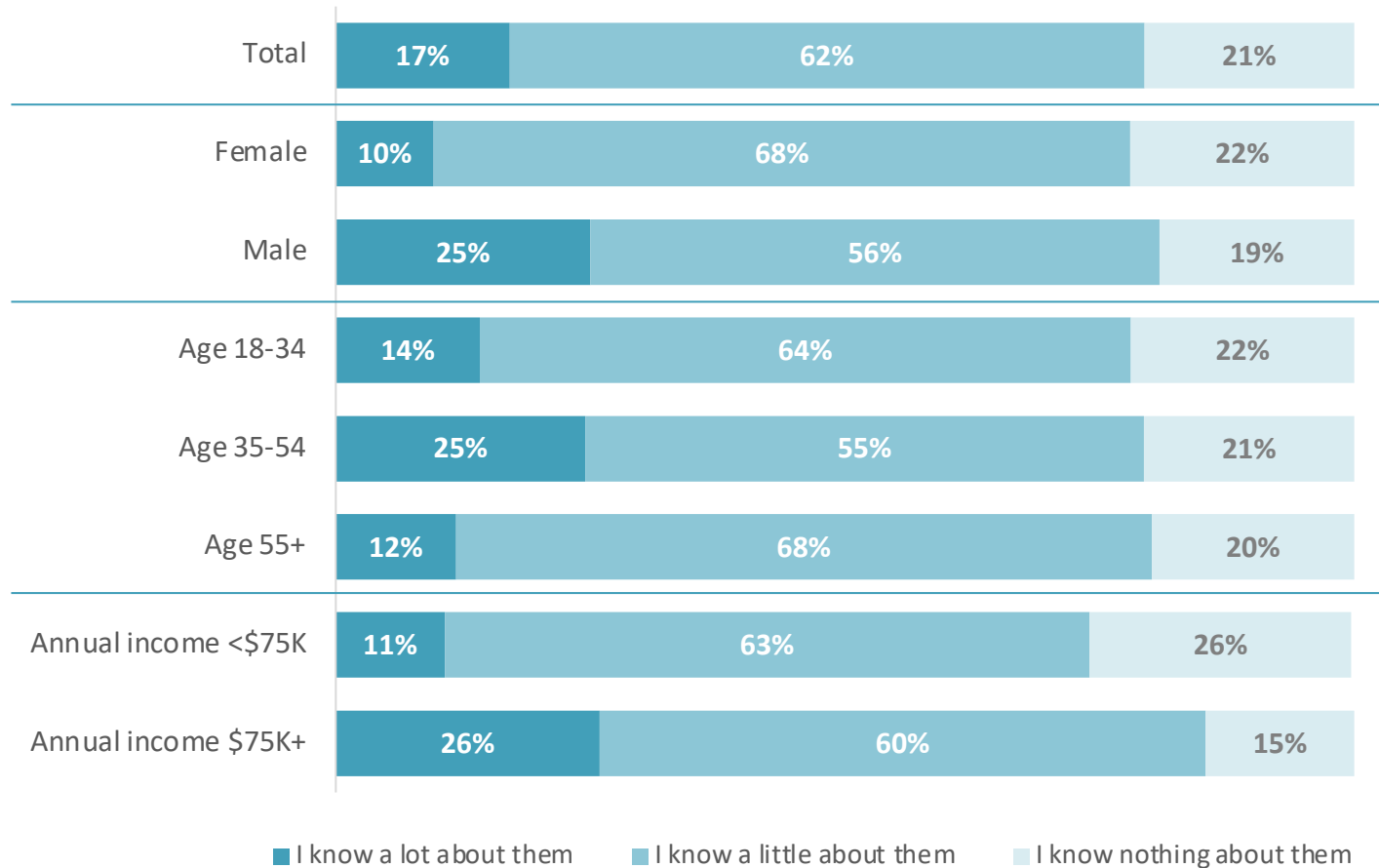
Impact of Gasoline Spending

The biggest effects gas spending has had on people's lives are cutting discretionary spending and the need to seek out cheaper gas.



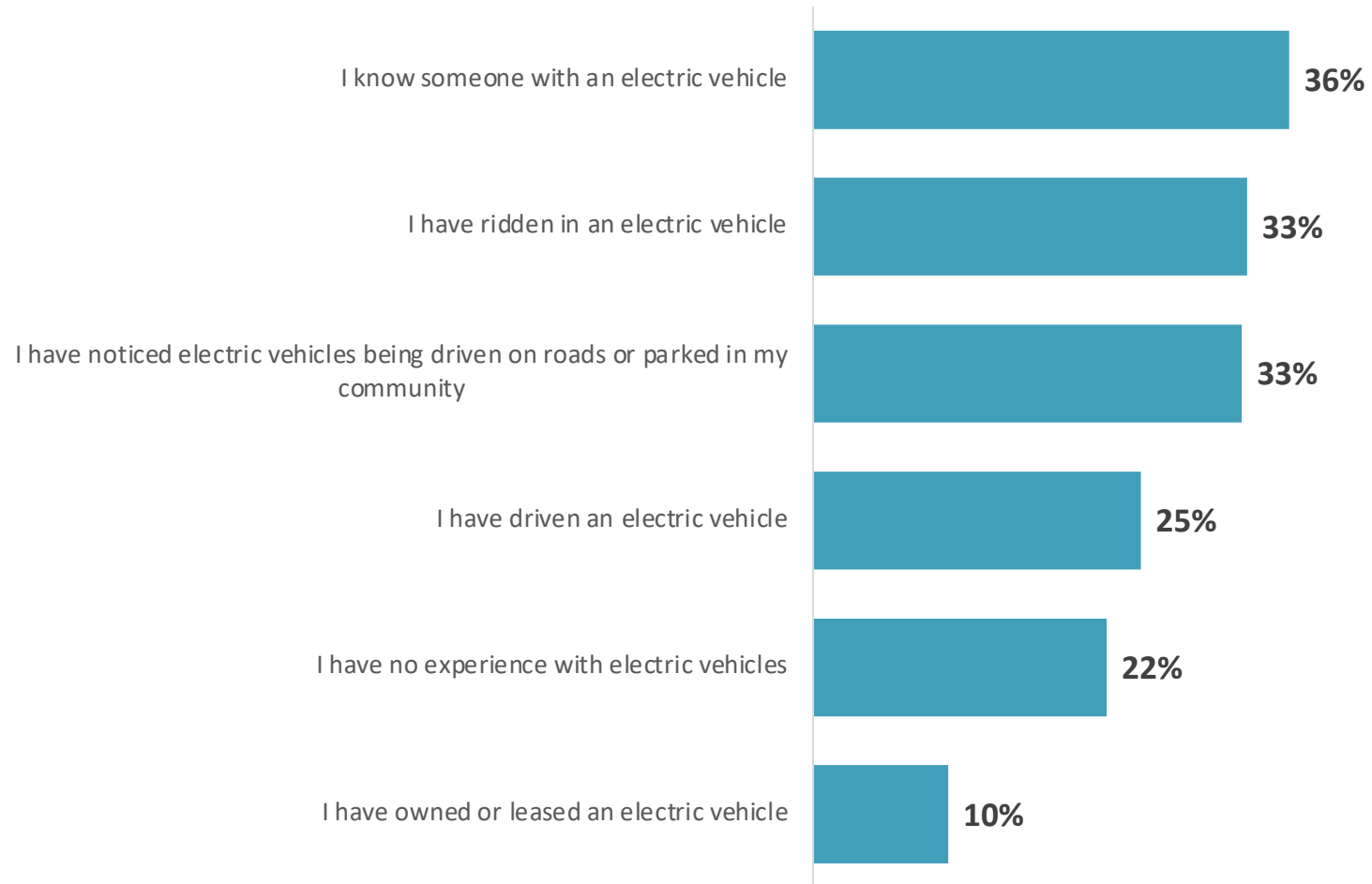
Familiarity with EVs

Only about one-fifth overall said they know a lot about EVs. People who have greater familiarity with EVs tend to be male, age 35-54, and have an income over \$75K.



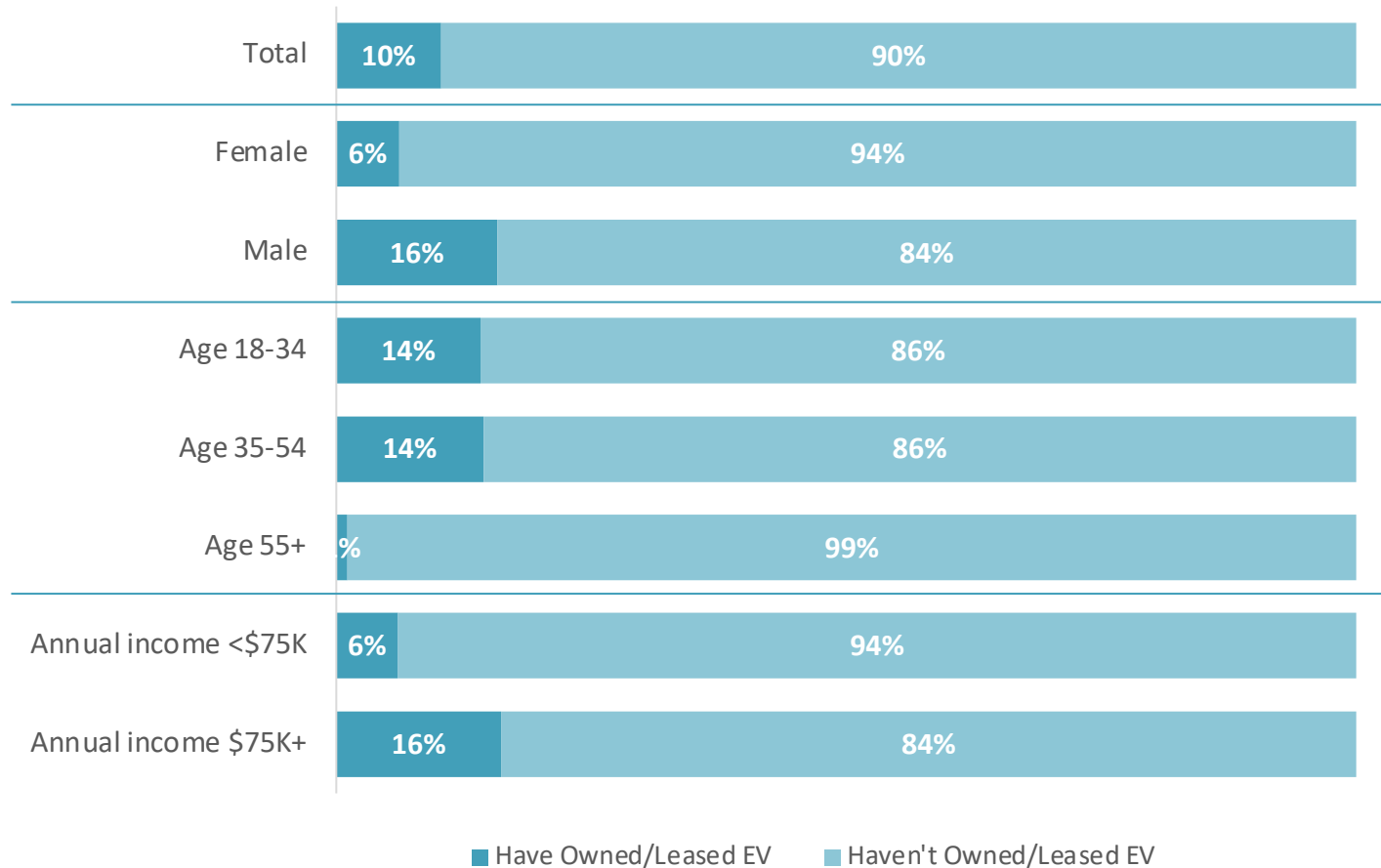
Experience with EVs

About one-third know someone with an EV, have ridden in and EV, and/or have noticed EVs in their community.



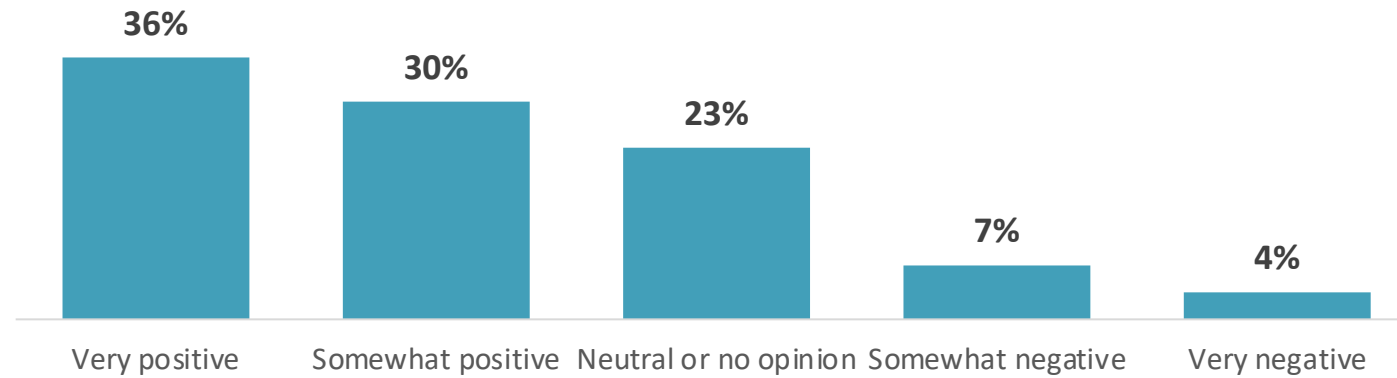
Have Owned/Leased an EV

People who are males, aged 18-54, and have an income above \$75K are more likely to have owned or leased an EV.



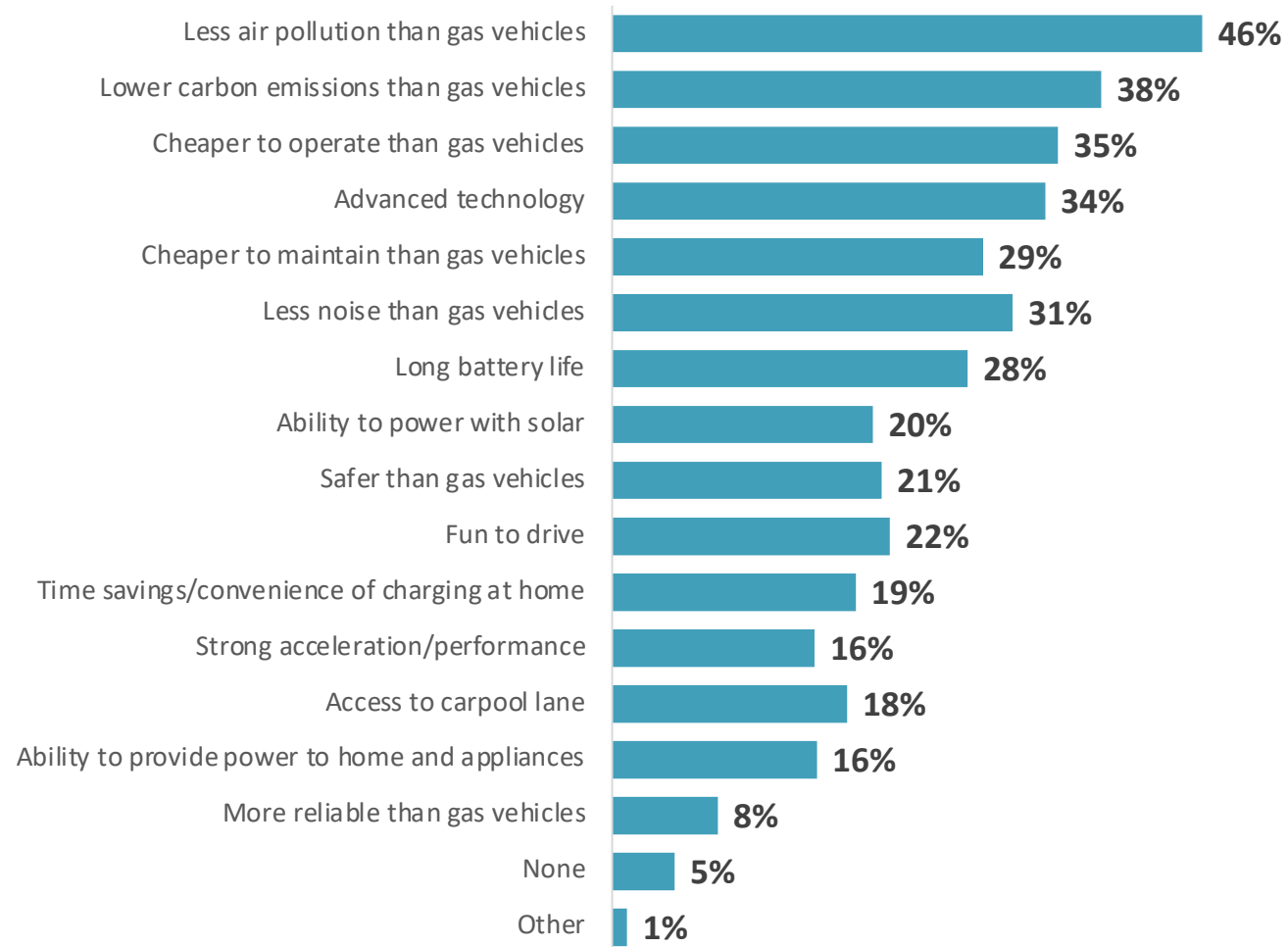
Sentiment About EVs

Two-thirds have a positive sentiment about EVs, with most of the remainder holding a neutral opinion.



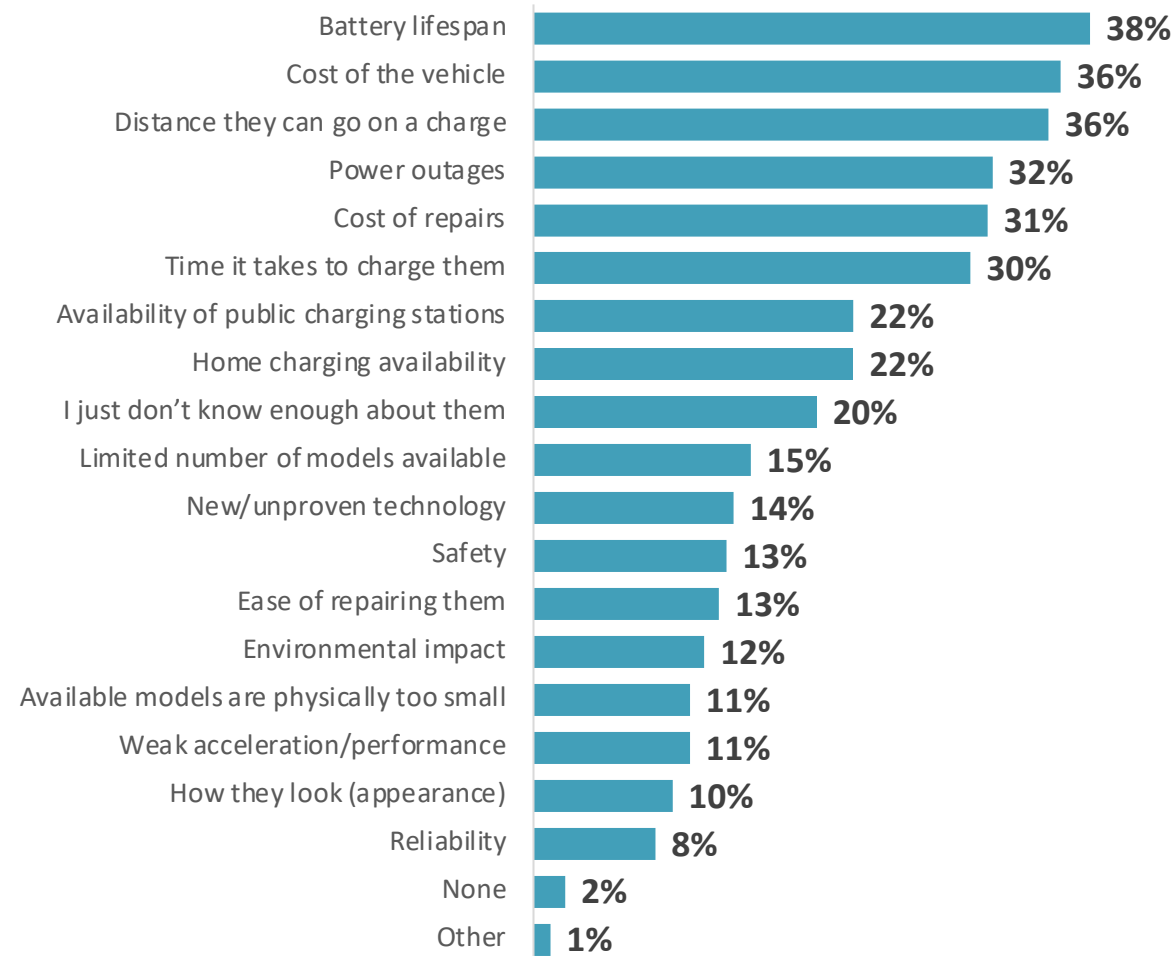
Biggest Perceived Positives of EVs

Seen as the biggest positives about EVs are reduced air pollution, lower emissions, lower cost to operate, and advanced technology.



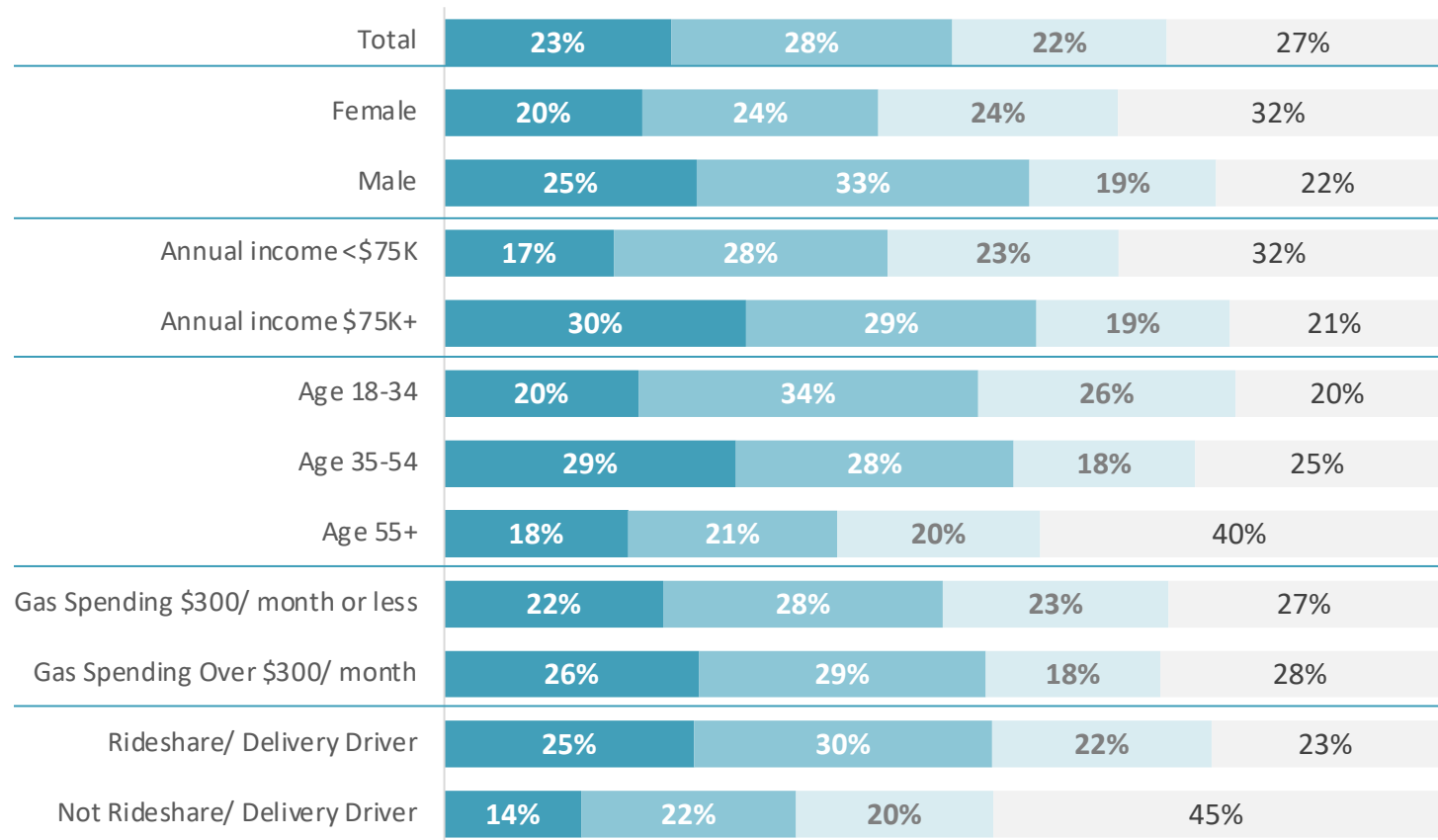
Biggest Perceived Negatives of EVs

Viewed as the biggest negatives about EVs are battery lifespan, range on a charge, and vehicle cost.



Likelihood of Replacing Current Vehicle With EV (1)

Overall, 23% are likely to replace their current gas vehicle with an EV in the next 12 months. Segments most likely to replace with an EV are those who've driven or ridden in an EV, rideshare/delivery drivers, people with \$75K+ annual income, aged 35-54, males, those with older vehicles, those who own their vehicle, those who get 20+ MPG and those that are aware of EV charging



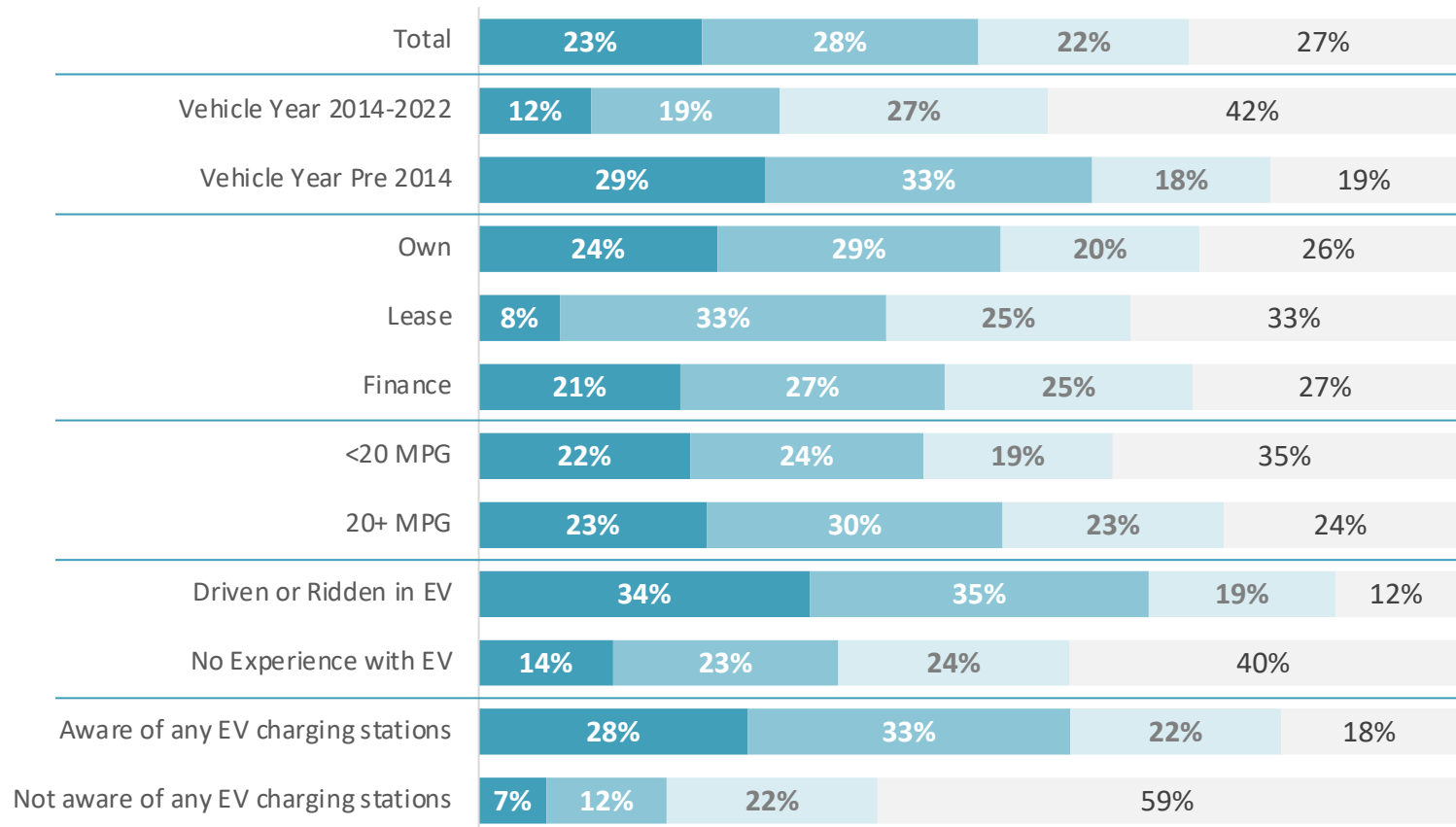
COLTURA

■ Within the next 12 months ■ 1-2 years from now ■ 3 to 4 years from now ■ Unlikely in the next 4 years

Q. Which of the following best describes your likelihood of replacing your current vehicle with an electric vehicle?

Likelihood of Replacing Current Vehicle With EV (2)

Overall, 23% are likely to replace their current gas vehicle with an EV in the next 12 months. Segments most likely to replace with an EV are those who've driven or ridden in an EV, rideshare/delivery drivers, people with \$75K+ annual income, aged 35-54, males, those with older vehicles, those who own their vehicle, those who get 20+ MPG and those that are aware of EV charging



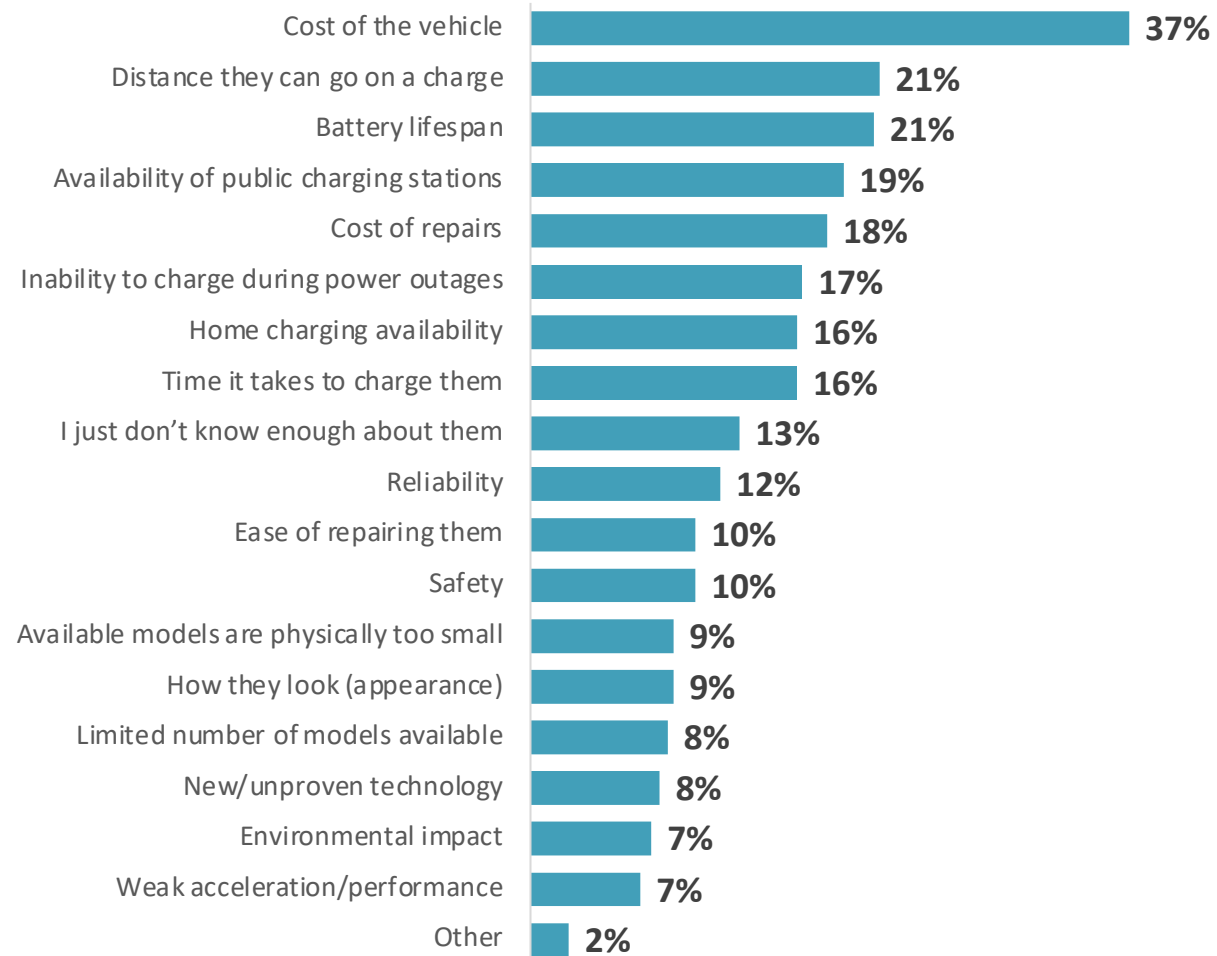
COLTURA

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Q. Which of the following best describes your likelihood of replacing your current vehicle with an electric vehicle?

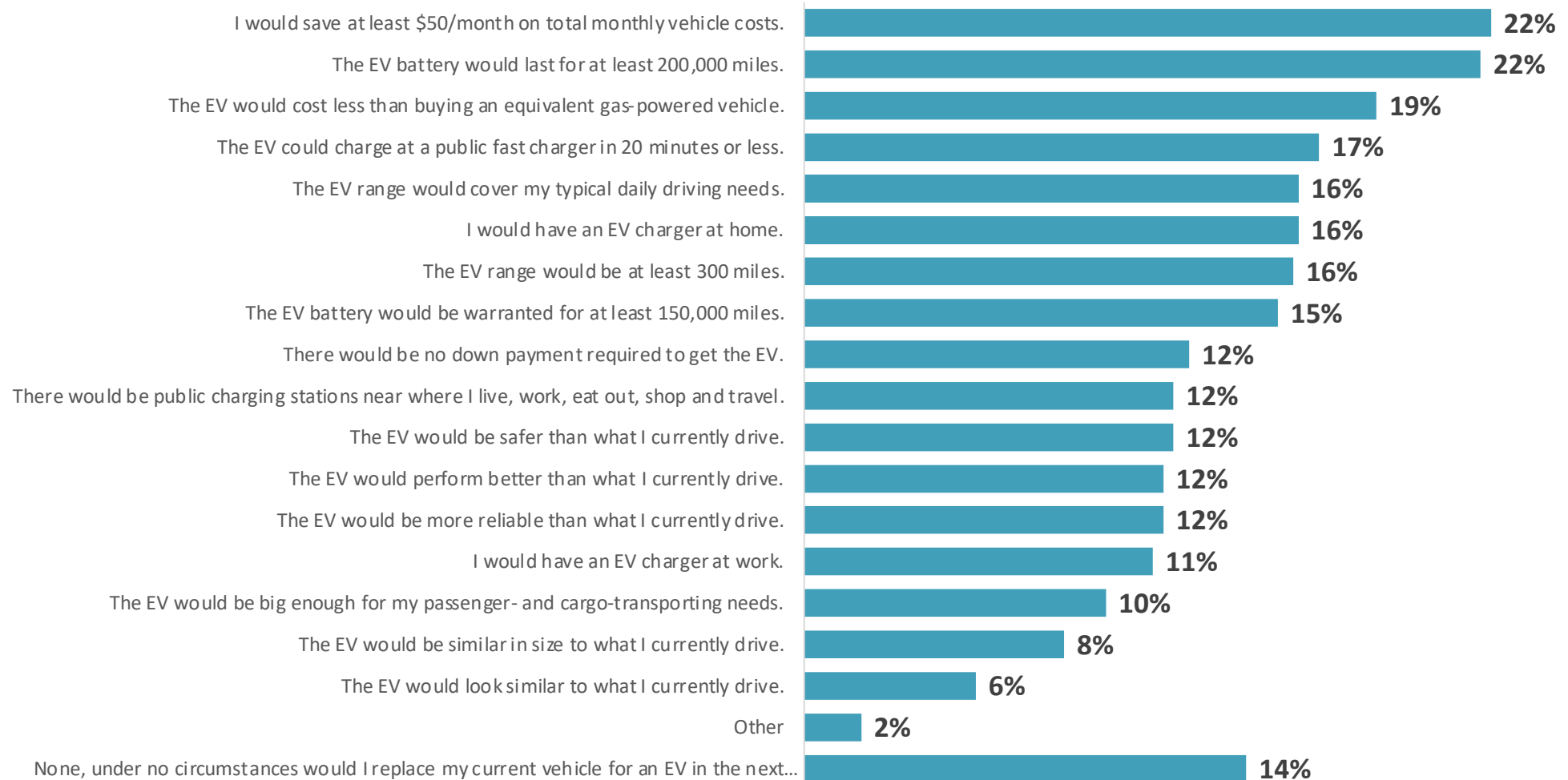
Biggest Barriers Preventing Switch to EV in Next 12 Months

Vehicle cost is by far the biggest barrier to switching to an EV in the next 12 months.



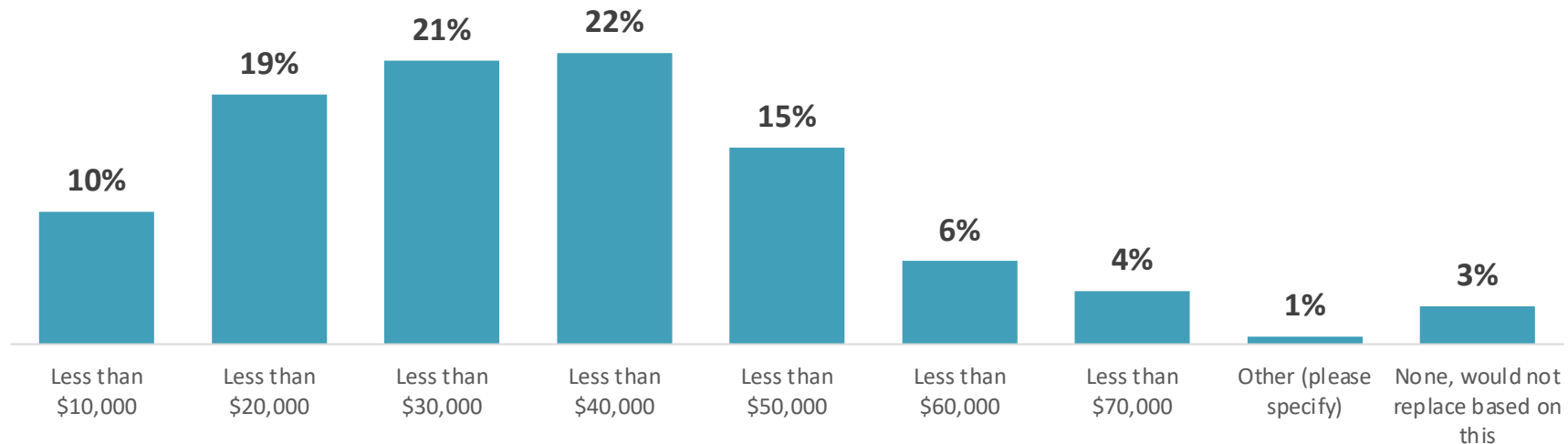
What Would Encourage Switching to EV in Next 12 Months

Most enticing to switch to an EV in the next 12 months are \$50/month savings, 200K mile battery life, and a vehicle cost below an equivalent gas vehicle.



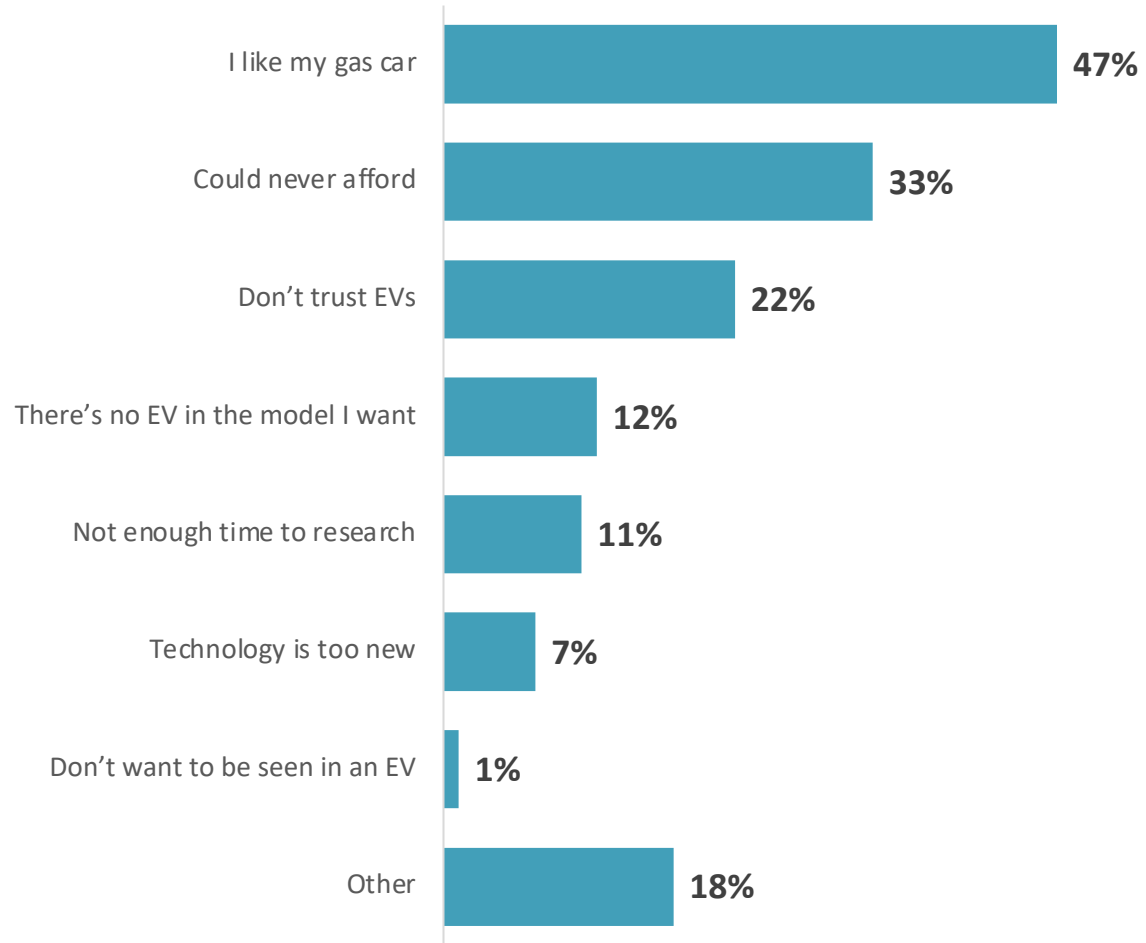
Purchase Price That Would Encourage Switching to EV in Next 12 Months

Half of the respondents said the purchase price of an EV would need to be less than \$30K for them to switch to an EV in the next 12 months. 22% would switch to an EV in the next 12 months if the EV price were less than \$40K.



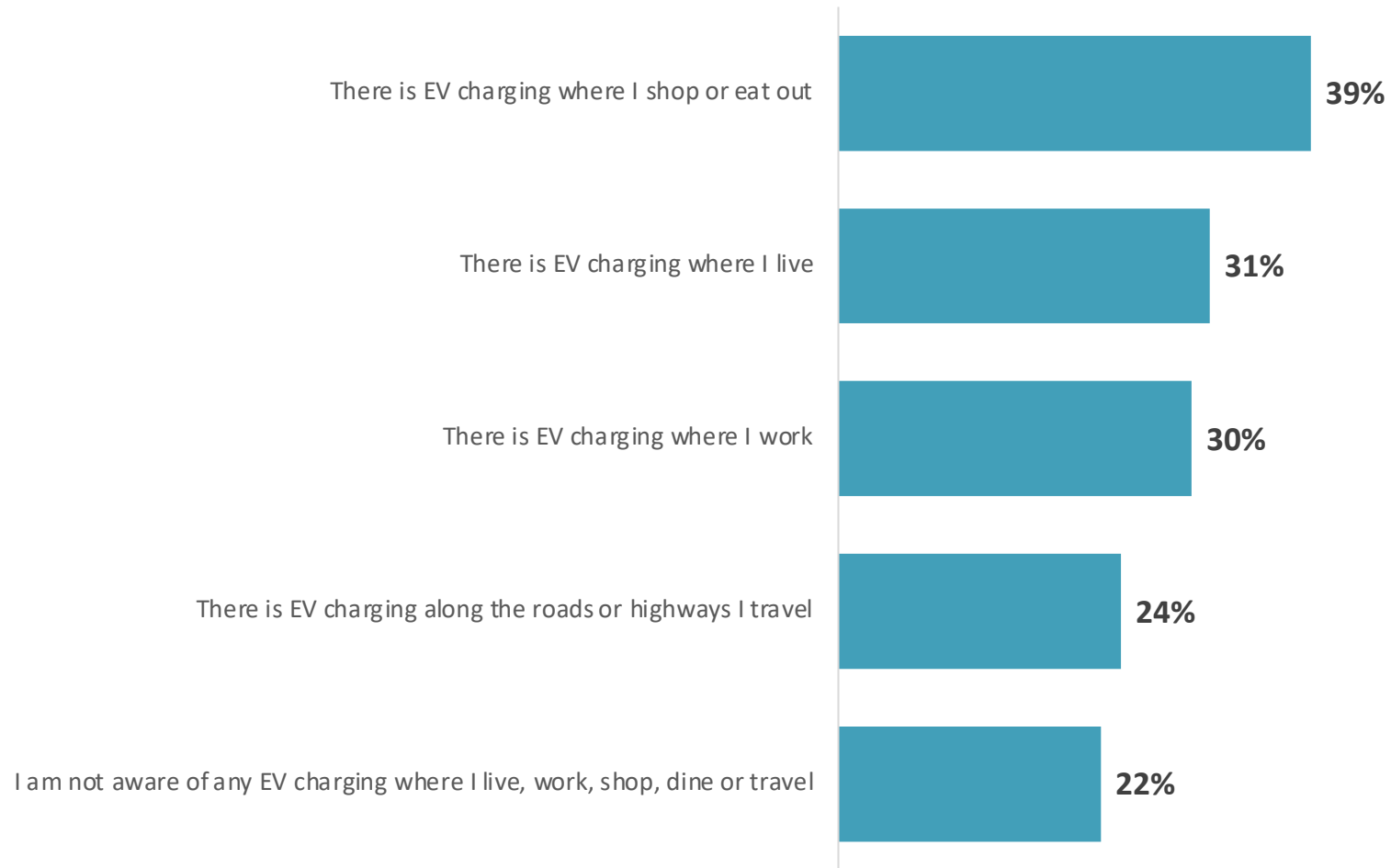
Why Wouldn't Switch to EV in Next 12 Months Under Any Circumstances

Those who said they wouldn't switch to an EV in the next 12 months under any circumstances most often said the reason is that they like their gas car and they could never afford an EV.



Awareness of EV Charging Locations

78% said they are aware of EV charging where they live, work, shop, dine or travel.



Public Transit

44% said they would switch to public transit for some or all of their driving if it were more convenient than driving.

