

Consumer Attitudes Survey 2021

Electric Vehicle Council
in partnership with carsales



Key insights

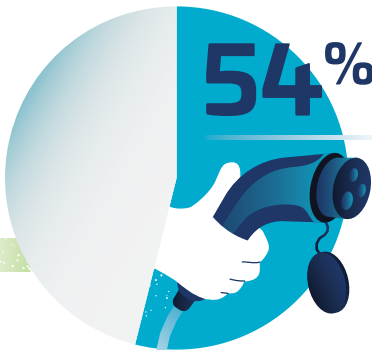
49%

Almost half of respondents see themselves driving an electric vehicle in 2030



54%

Over half of respondents would consider an electric vehicle as their next car purchase



Electric vehicle consideration is highest among the age range of 30-44 years old



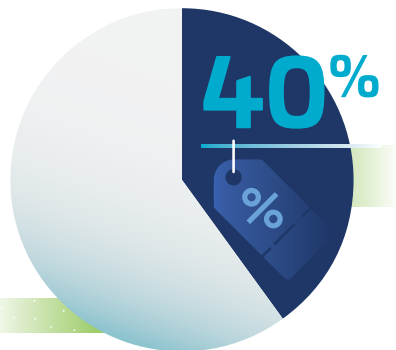
Over 50%

of respondents would pay more for an equivalent electric vehicle, compared to a petrol/diesel



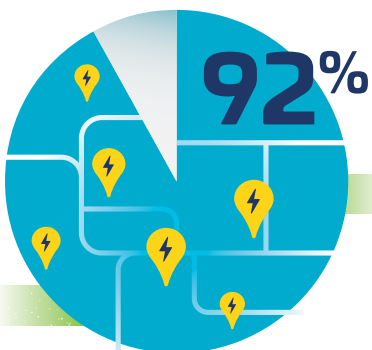
40%

of respondents would be encouraged to purchase an electric vehicle if government subsidies were available to assist with the initial purchase cost



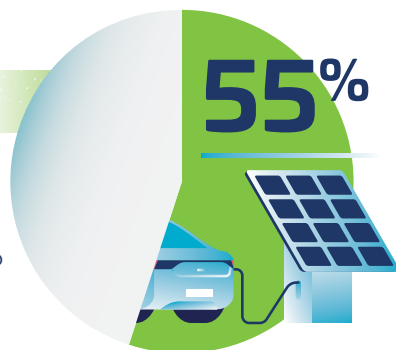
92%

of respondents agreed public charging infrastructure was important in encouraging them to buy an electric vehicle



55%

of respondents indicated they would power their electric vehicle via solar panels



Executive Summary

Consumer awareness is an integral part of increasing electric vehicle uptake and getting Australia up to speed on the benefits of this new technology.

To ensure policy and business decisions are well-informed, the Electric Vehicle Council undertakes annual snapshots of the Australian public's sentiments.

Each year we find Australians are enthusiastic for the future and this year is no different. More than half of Australians would consider their next vehicle purchase to be electric; overwhelmingly, they make this choice based on their concern for the environmental impact of our transport system, that accounts for our second largest and fastest growing source of emissions.

This year's report finds Australian consumers are ready to take action to see the benefits of a zero-emission transport future. More than half of those surveyed say they would pay more to buy an electric vehicle, recognising its lower operating costs and broader societal benefits.

Far from political conversations about our electricity supply, most would take action to ensure their vehicle is charged from renewable energy, such as rooftop solar or

buying green energy from the grid.

But to achieve this, Australians also want to see vision and leadership from our governments. Financial rebates to subsidise the cost of buying an electric vehicle is the primary action Australians want to see to immediately make the technology more accessible.

These responses make it clear that Australians are interested in the electric vehicle revolution. This suggests that the benefits over petrol and diesel vehicles – benefits for the environment, health, fuel security, and running costs – are known to and valued by Australian consumers.

Finally, a note on methodology. In previous years we have used data from surveys carried out by Australian motoring clubs. This year, however, we harnessed the audience of car buyers on leading car sales and review website, carsales.com.au to get feedback from in-market buyers.

Buyers on carsales were asked to complete a survey for the Electric Vehicle Council over the week 5th – 12th July, 2021. We received over 3000 responses.

Behyad Jafari
Chief Executive Officer

Australians want electric vehicles

54% of Australians would consider purchasing an electric vehicle as their next car. This is on trend with previous years, with 53% in 2019 and 56% in 2020.

Those aged in their 30s and 40s were the most likely to consider buying an electric vehicle (up to 60%).

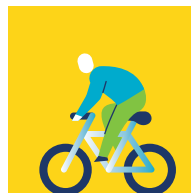
I currently own a petrol/diesel vehicle and would consider buying an EV as my next car purchase

51%



I'm not looking to buy a car

7%



39%

I would not consider buying an EV as my next car purchase

3%

I currently own an EV and would consider another EV as my next car purchase



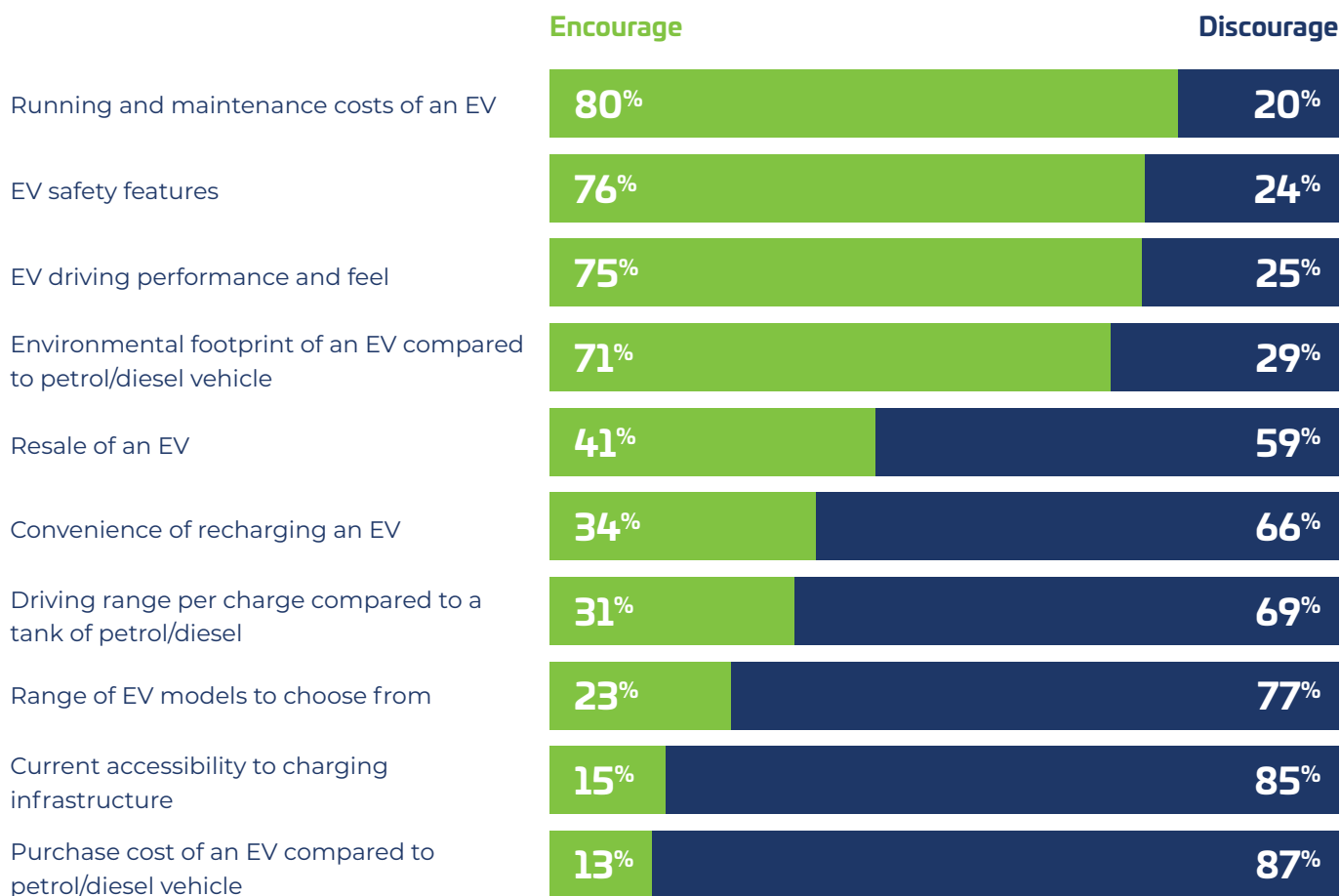
Lower running costs, performance and the environment

are key drivers encouraging people to buy electric vehicles. However, the initial purchase price is still seen as the biggest barrier to entry.

As more people spend time researching the capabilities of electric vehicles, we see enthusiasm for them rise. In 2021, more respondents understood that reduced running costs is one of the benefits to owning an electric vehicle, with 80% indicating this would encourage them to buy an EV compared to 54% in 2020.

This is mirrored in the electric vehicle driving performance metric, where 75% indicated it would encourage an EV purchase in 2021, compared to 48% in 2020.

Price remains the biggest concern, with 87% indicating the upfront purchase price of an EV would discourage them from buying one.



Australians value the environmental benefit of electric vehicles

Australians particularly see the environmental benefit of switching to an electric vehicle.

43% see reduced vehicle emissions as the main benefit of Australia transitioning from petrol and diesel to EVs.



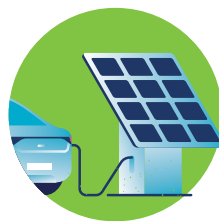
43%

Environmental
Reduced vehicle emissions



22%

I don't see any benefits



17%

Fuel security
Decreased reliance on imported fuels



11%

Health
Reduced air and noise pollution

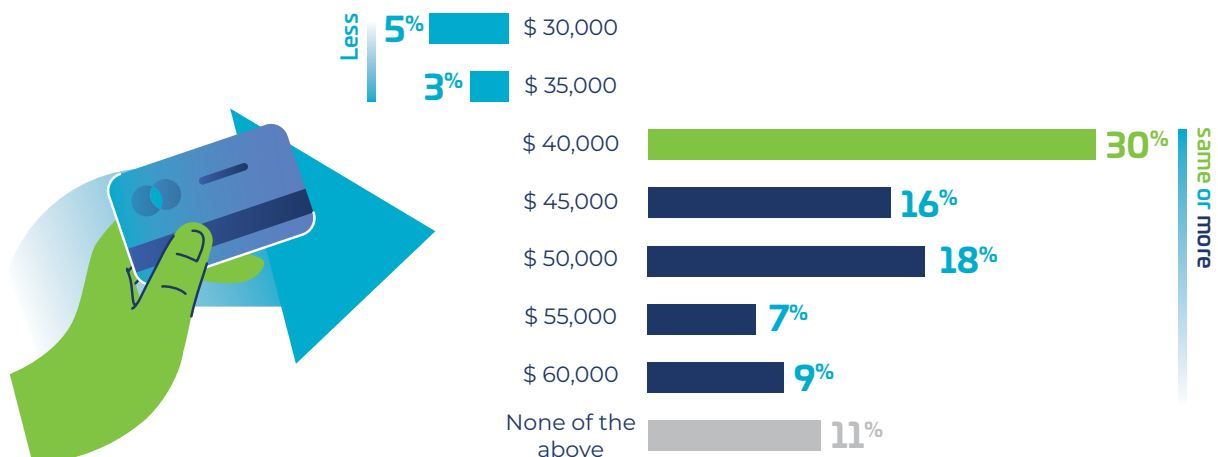


7%

Economic
New domestic industries and jobs

And they're ready to take action

Australians are ready to invest in the future. 50% of respondents indicated they would pay more for an equivalent electric vehicle, compared to a petrol/diesel valued at \$40,000.



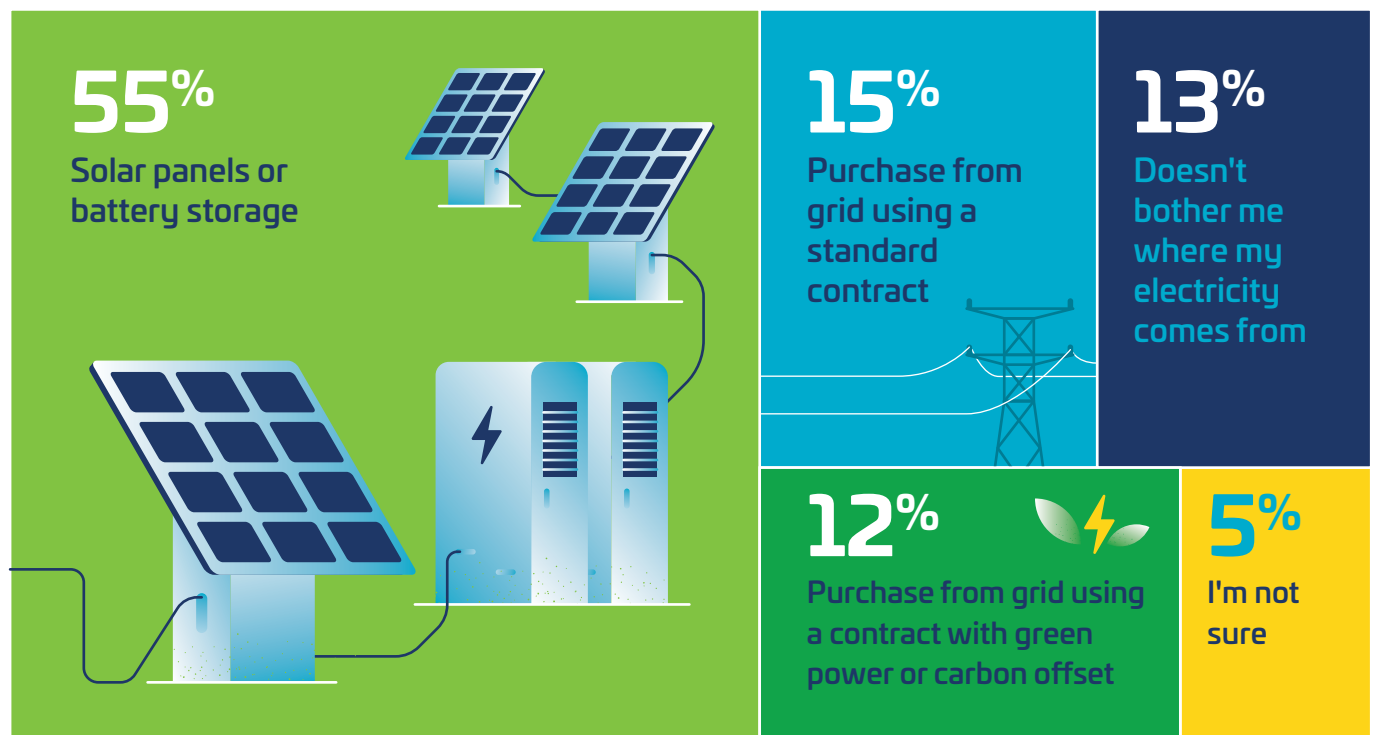
To realise the environmental benefits of EVs,

customers indicated they'd go the extra mile to charge them from renewable energy.

When asked how they would most likely source their energy for charging an electric vehicle, two-thirds said they'd use renewable energy.

The majority of respondents (55%) indicated they would power their EVs via solar panels or battery storage.

A further 12% identified that they would purchase energy from the grid using green power or a carbon offset.



Given that public charging networks are also powered using renewable energy, this means that electric vehicles will have a significant positive impact on emissions reductions. Importantly, consumers recognise and are ready to act on the fact that an EV puts the power in their hands to use clean energy today and drive at zero emissions.

Support for strong government action to bring down EV prices

To capture what government support would most assist in buying an electric vehicle, respondents were asked which government subsidy would encourage their purchase.

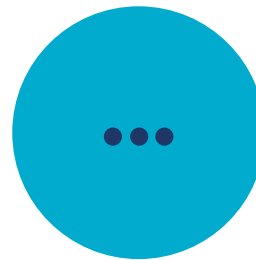
50% of respondents indicated that a reduction in the cost of an electric vehicle (via subsidies or registration/stamp duty discounts or toll roads) would encourage them to purchase an EV.

Support for more charging infrastructure, both publicly and at home, was also an important consideration.



40%

Subsidies to reduce cost of purchasing an EV



22%

None - I wouldn't buy an EV



19%

Provision of public charging infrastructure



10%

Discounts to registration, stamp duty and toll roads



7%

Subsidies to reduce cost of installing home charging infrastructure



1%

Provision of more information about EVs



1%

Vehicle lane and parking privileges

The importance of driving range

Driving range per charge

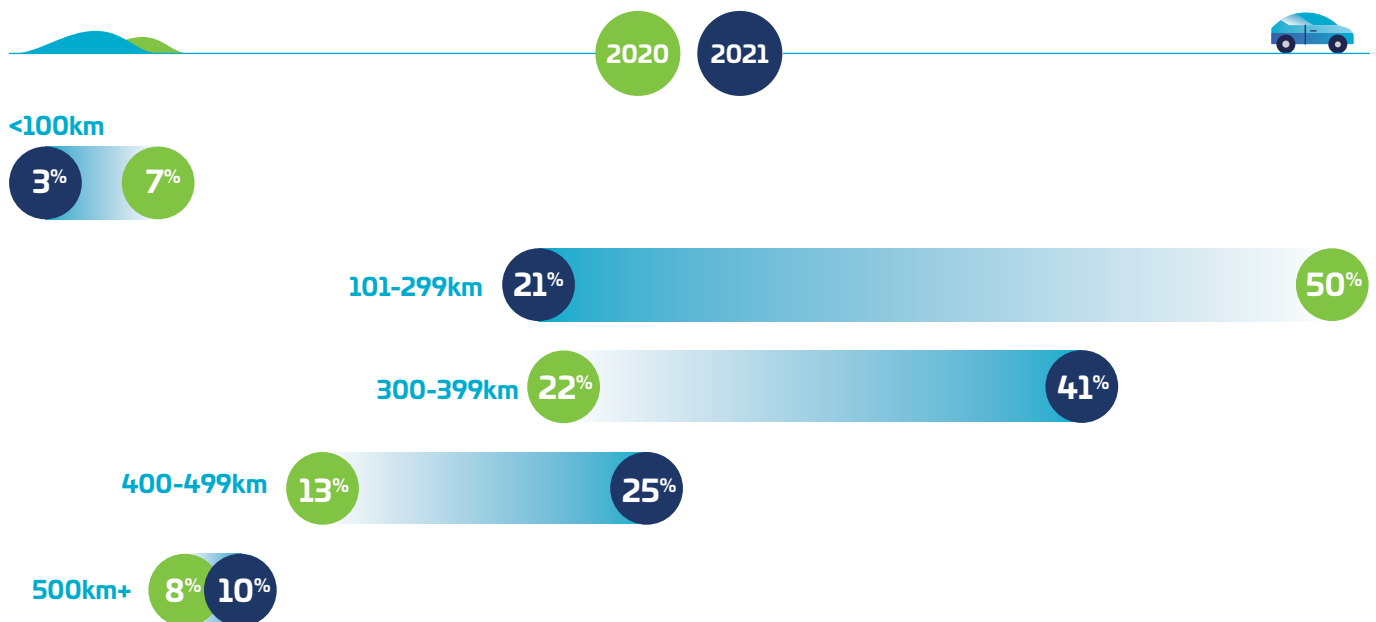
Australian consumers consistently highlight that driving range is a key barrier in the transition to an electric vehicle.

However, consumer perception of real driving range per charge varies widely. In 2020, almost 80% of respondents underestimated the driving range of an EV, with 57% believing that an electric vehicle had less than 300km driving range.

Survey results this year, however, indicate that consumers have a more accurate understanding of the average driving range of an electric vehicle, with the majority of respondents (76%)

believing that a full charge will deliver them a range of more than 300km. This is in line with the true average range of battery-electric vehicles in Australia (395km).

Only 24% of respondents believe that an electric vehicle has less than 300km range on a full charge, which is a 33% positive change from 2020. Furthermore, 35% of respondents indicated that, on average, electric vehicles can travel more than 400km per full charge, compared to 21% in 2020, indicating that consumer perception of driving range per full charge is becoming more accurate.

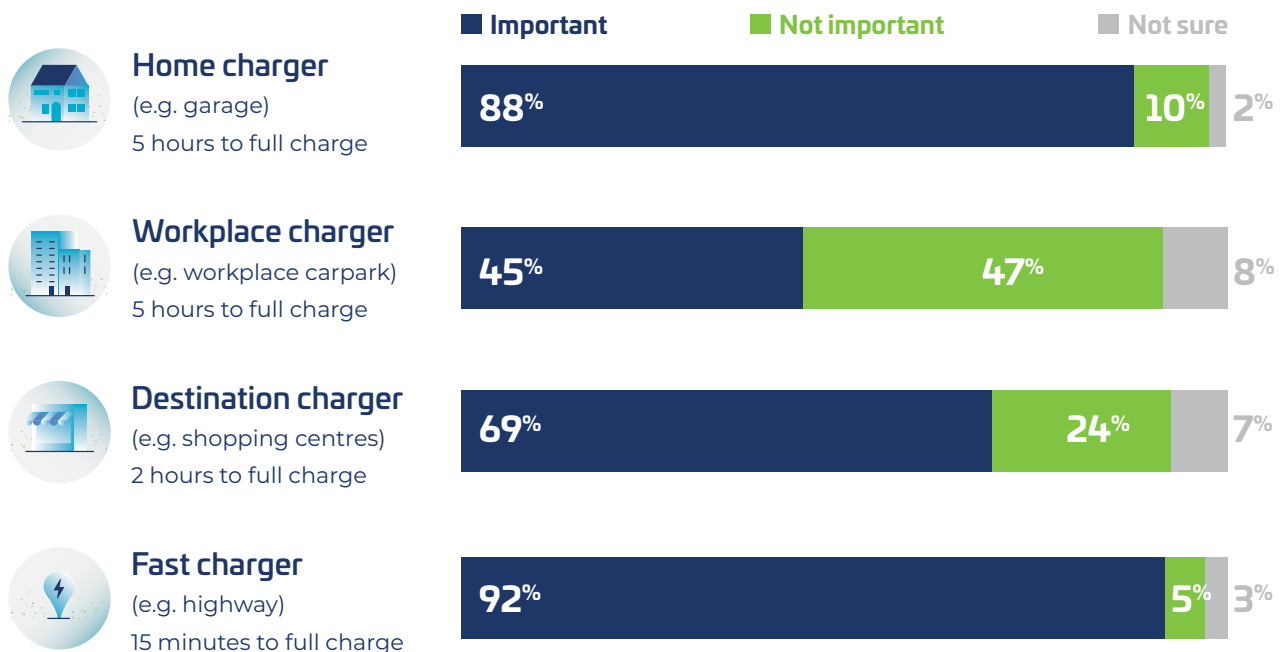


Charging infrastructure

The importance of different levels of charging infrastructure in 2021 produces similar responses as those in 2020, with most respondents regarding public fast charging infrastructure as important for encouraging the purchase of an electric vehicle (92%).

This was followed closely by home charging at approximately 88%. However, international research suggests that home charging is the most preferred and frequently used charging method for EV users in the USA and EU. This suggests there is a disparity in perceived use of chargers between actual users in high-uptake countries and potential users in Australia.

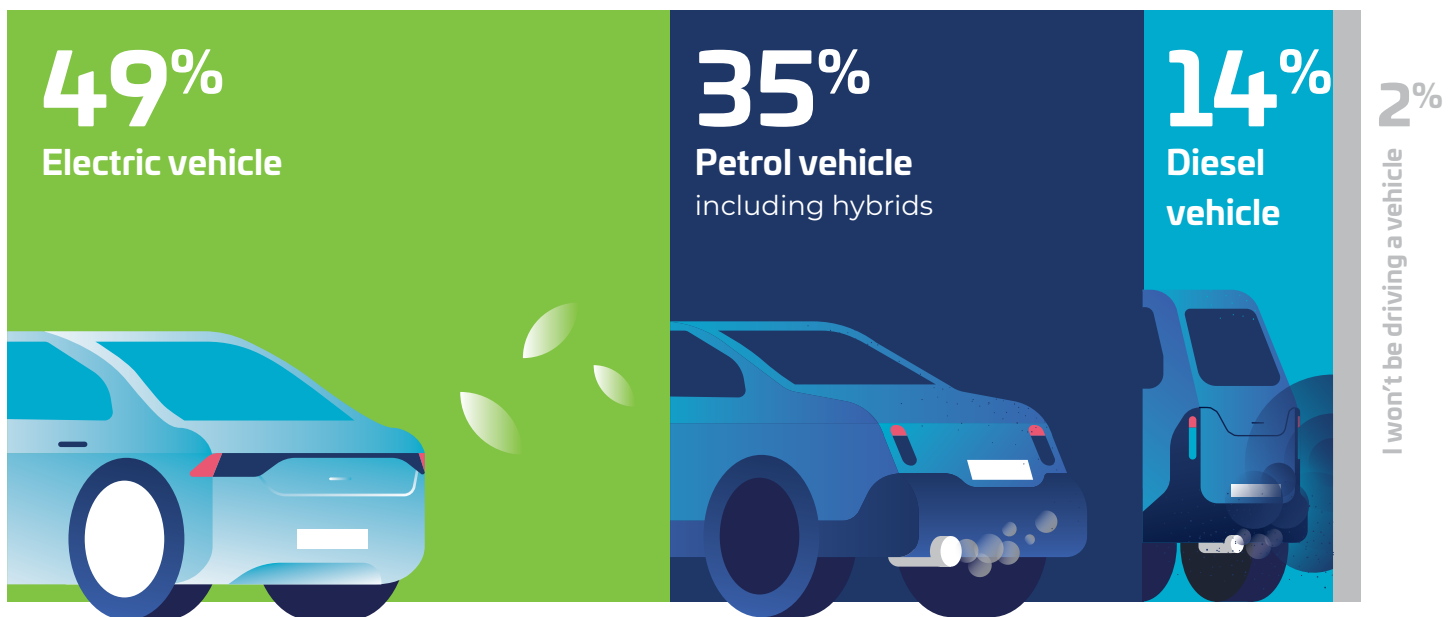
Where owners of electric vehicles prefer charging at home, potential users of electric vehicles cite public charging infrastructure as equally important to encourage uptake. With increasing consumer awareness of electric vehicles and charging infrastructure, we can expect those perceptions of access to public electric vehicle charging will be less of a barrier.



Charging to an electric vehicle future

This year, we asked respondents what vehicle they are likely to be driving in 2030 and nearly 50% of respondents indicated an electric vehicle.

Those aged in their 30s and 40s were the most likely to consider buying an electric vehicle (up to 60%).



This suggests that those considering an electric vehicle today are the likely drivers of electric vehicles in 2030.

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