

DOCKETED

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The Ford logo is rendered in its signature white script font, positioned on the left side of the image. The background is a dark blue, long-exposure photograph of a highway at night, with light trails from vehicles creating a sense of motion and depth. A thin white vertical line is placed to the right of the logo, separating it from the text on the right.

Ford

Customer Perspectives

Customer Preferences: Retail Customers

- Retail customers seek exciting & capable ZEV products.
- Primarily interested in products that deliver performance and enhanced technical capabilities, in addition to great range.
- Retail segments are primarily light duty cars, pickup trucks and SUVs along with medium duty pickup trucks.
- CVRP & HVIP are important to help incentivize retail customers to consider ZEV solutions, especially where ICE cost parity is not yet achieved.
- EV infrastructure & vehicle costs are the top 2 barriers to broader EV adoption.
 - EV vehicle costs can be overcome by incentives until natural cost parity is achieved with ICE products.
 - EV infrastructure need to be addressed by coordinated efforts between CARB, CEC, and utility providers.



Retail Customers Want Exciting & Capable Products.

Customer Preferences: Fleet Customers

- Fleet customers are primarily focused on vehicles that are cheaper to operate or increase productivity.
 - Medium Duty Vans & Heavy Duty Trucks & Vans are primarily owned by fleets.
 - » > 65% of MD (class 2b-3) vans
 - » > 80% of HD (class 4+) vehicles
- Fleet needs are highly variable: Best near-term EV segments are those with consistent routes and access to level 2 charging.
 - Fleet owners expect a 3-5 year payback on a ZEV product—regardless of how long its used.
 - Fleets are not interested in vehicle tradeoffs and want a vehicle that can get the job done. A ZEV needs to fulfill 95th percentile day to be considered.
- CVRP & HVIP are important to help incentivize fleet customers to consider ZEV solutions, especially where ICE cost parity is not yet achieved.



Fleet Owners Are Primarily Focused On Maximizing Productivity And Saving Money.