



Center for
Sustainable Energy[®]
CALIFORNIA

California Energy Commission

DOCKETED

14-IEP-1B

TN 73574

AUG 07 2014

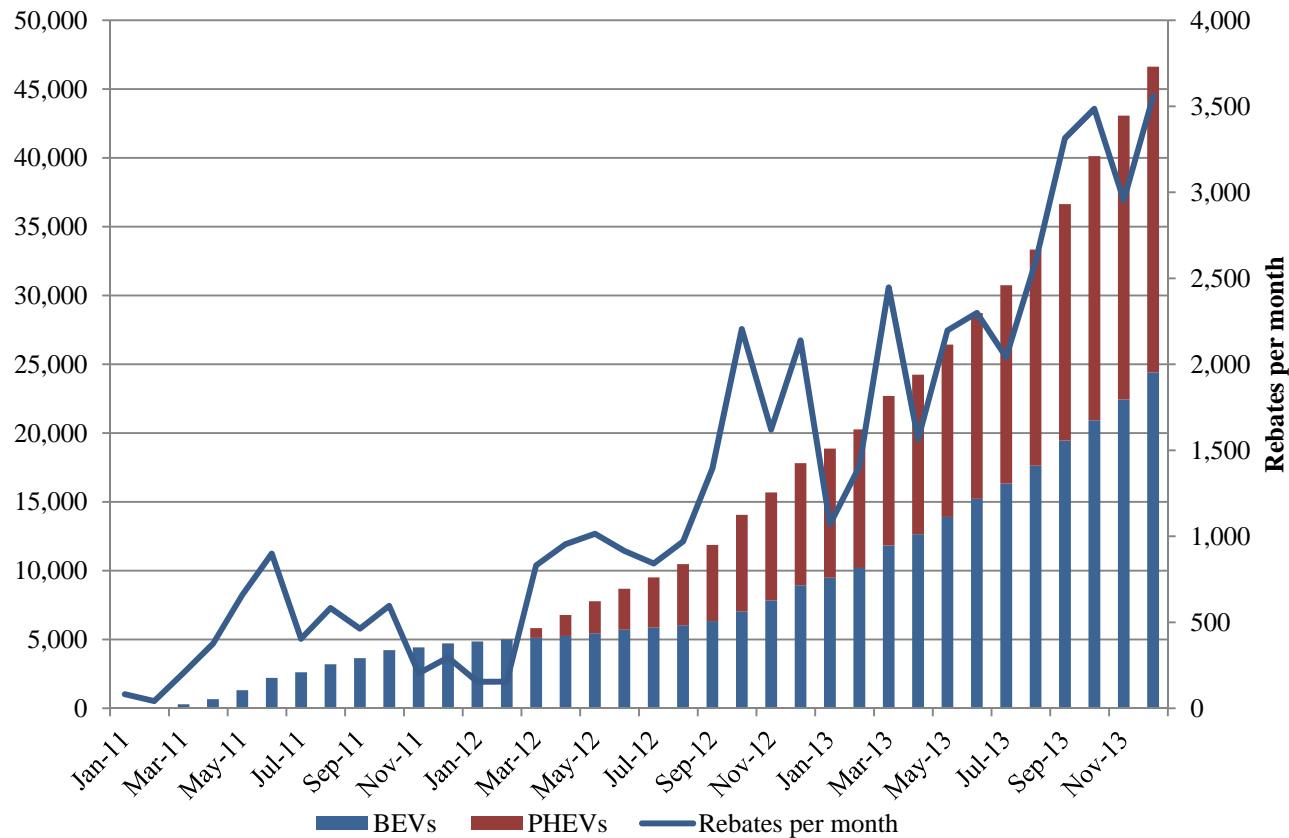
What Drivers are Saying

March 7, 2014

Governor's Office Summit on Zero Emission Vehicles

CalEPA Headquarters, Sacramento

Cumulative and Monthly CVRP Rebates



By purchase/lease date

CVRP Survey Overview

Recurring Survey

Population: 8,756

Respondents: 3,881

Vehicle Purchase Dates:
Q1 2010 - Q3 2012

Real-Time Survey

Population: ~40,000

Respondents: ~6,500

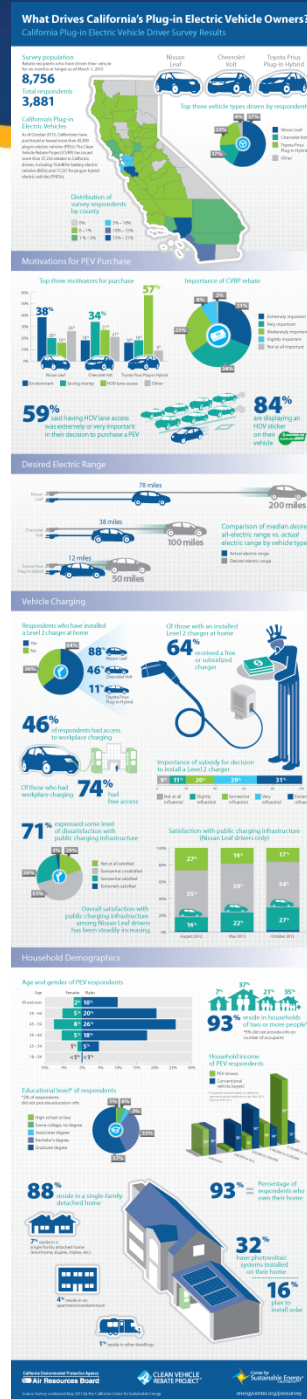
Vehicle Purchase Dates:
Q4 2012 - present

Recurring Survey

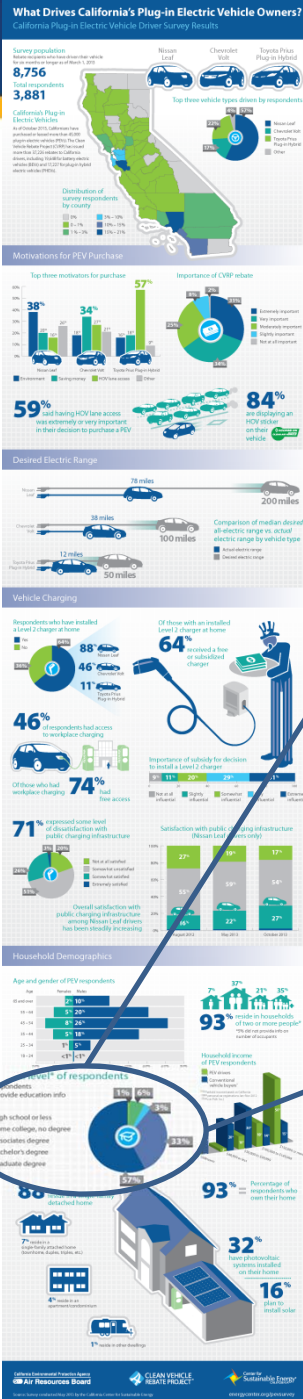
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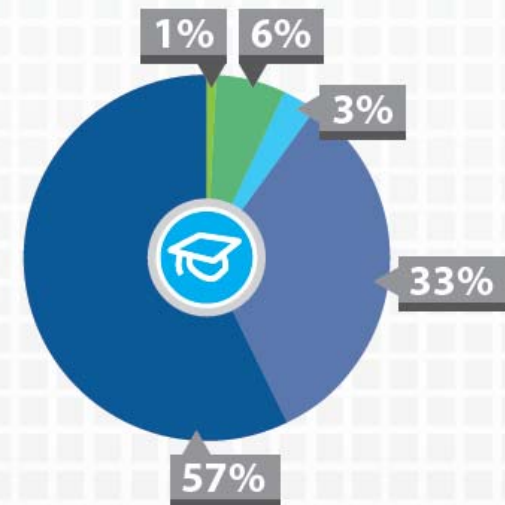


Population: 8,756
Respondents: 3,881
Vehicle Purchase Dates: Q1 2010 - Q3 2012

Educational level* of respondents

*2% of respondents did not provide education info

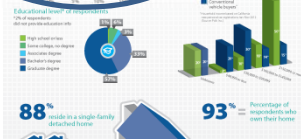
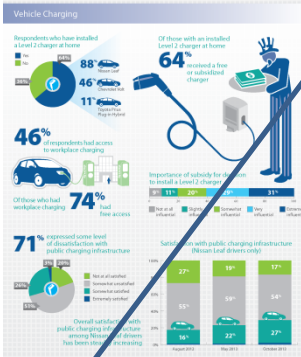
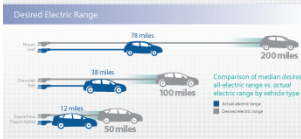
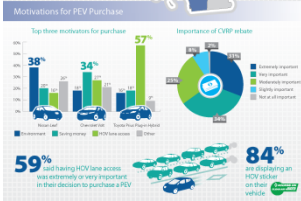
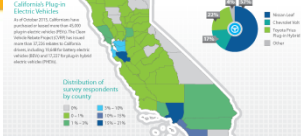
- High school or less
- Some college, no degree
- Associates degree
- Bachelor's degree
- Graduate degree



What Drives California's Plug-in Electric Vehicle Owners?

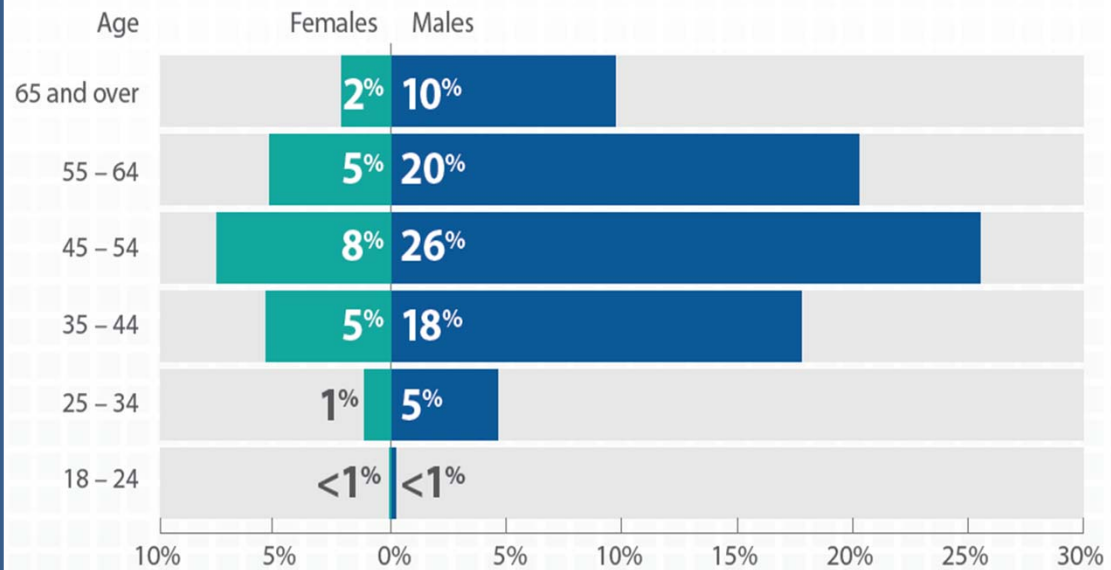
California Plug-in Electric Vehicle Driver Survey Results

Survey population
Respondents who drove their vehicle
longer on March 1, 2013
8,756
Total respondents
3,881



Population: 8,756
Respondents: 3,881
Vehicle Purchase Dates: Q1 2010 - Q3 2012

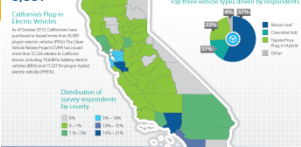
Age and gender of PEV respondents



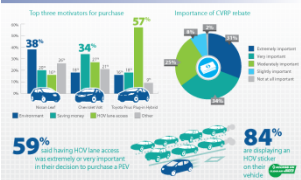
What Drives California's Plug-in Electric Vehicle Owners?

California Plug-in Electric Vehicle Driver Survey Results

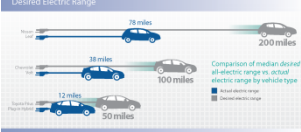
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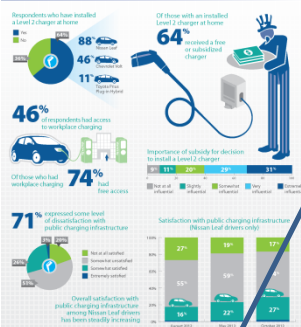
Motivations for PEV Purchase



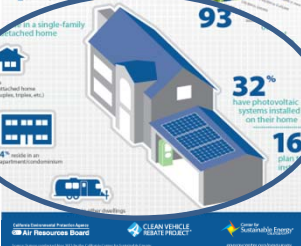
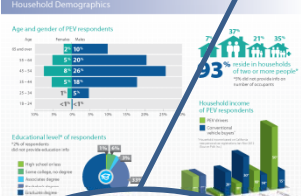
Desired Electric Range



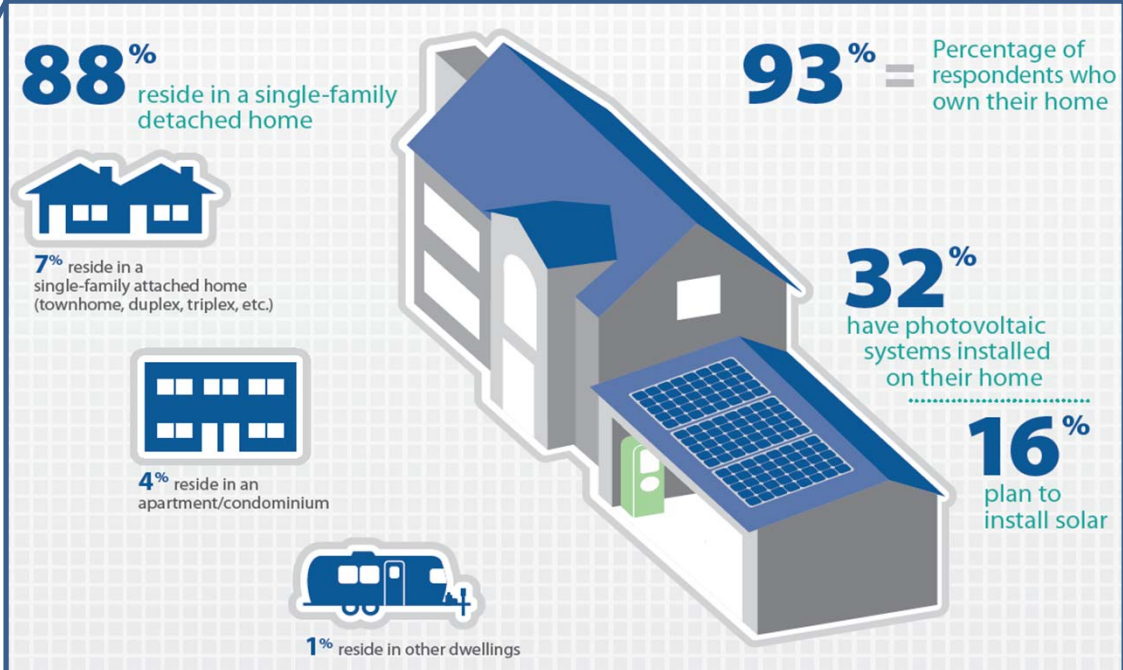
Vehicle Charging



Household Demographics



Population: 8,756
Respondents: 3,881
Vehicle Purchase Dates: Q1 2010 - Q3 2012



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What Drives California's Plug-in Electric Vehicle Owners?

California Plug-in Electric Vehicle Owners

California's Plug-in Electric Vehicles



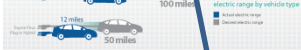
Motivations



Desired Electric Range



Vehicle Charging



Household Demographics



Overall satisfaction with public charging infrastructure among PHEV and EV drivers has been steadily increasing



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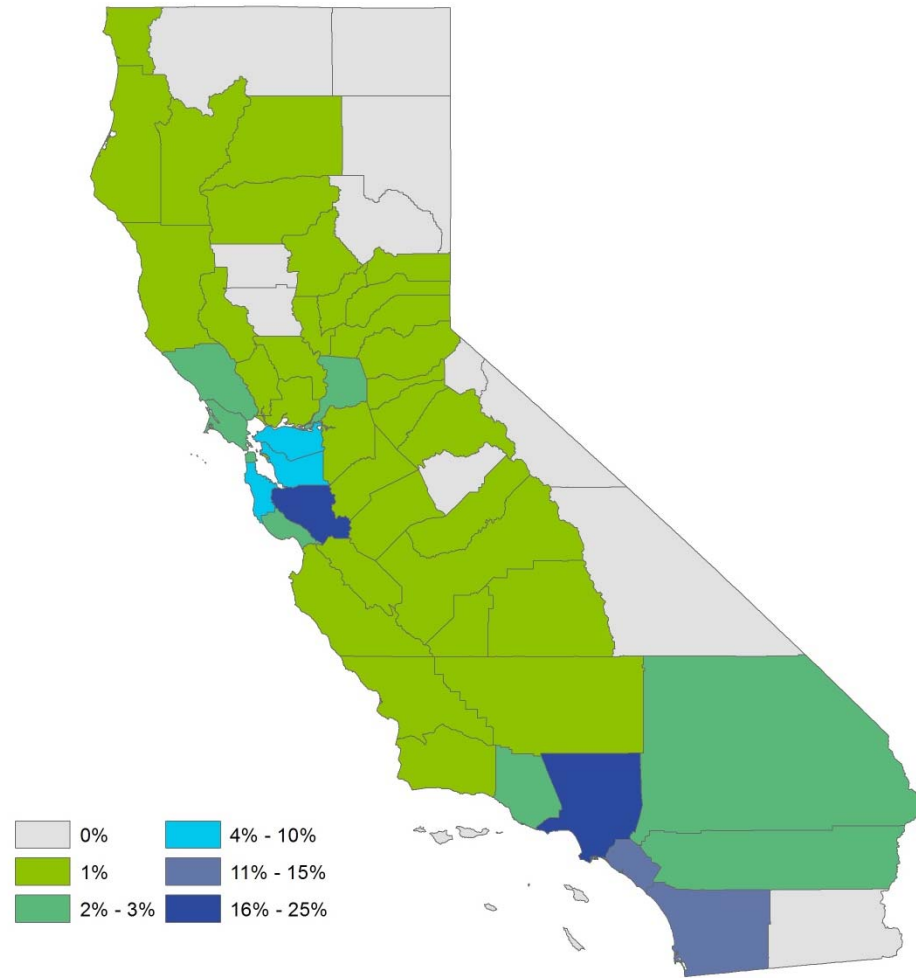
Overall satisfaction with public charging infrastructure among PHEV and EV drivers has been steadily increasing



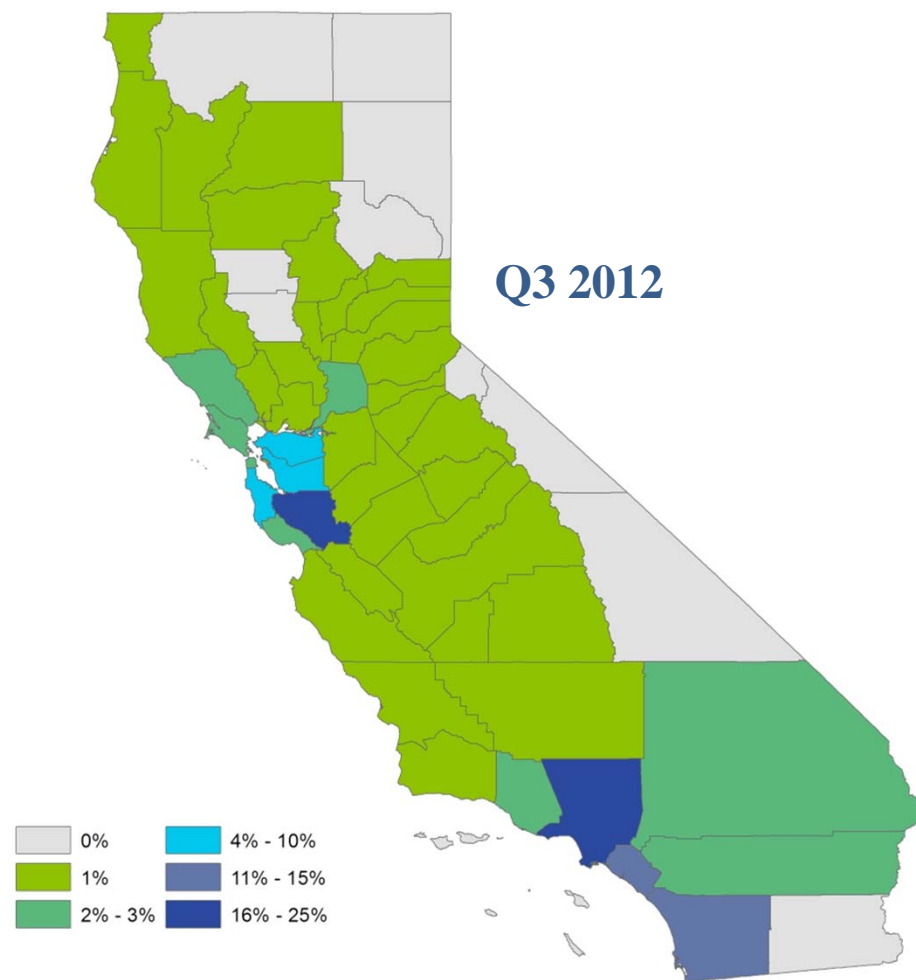
Overall satisfaction with public charging infrastructure among PHEV and EV drivers has been steadily increasing



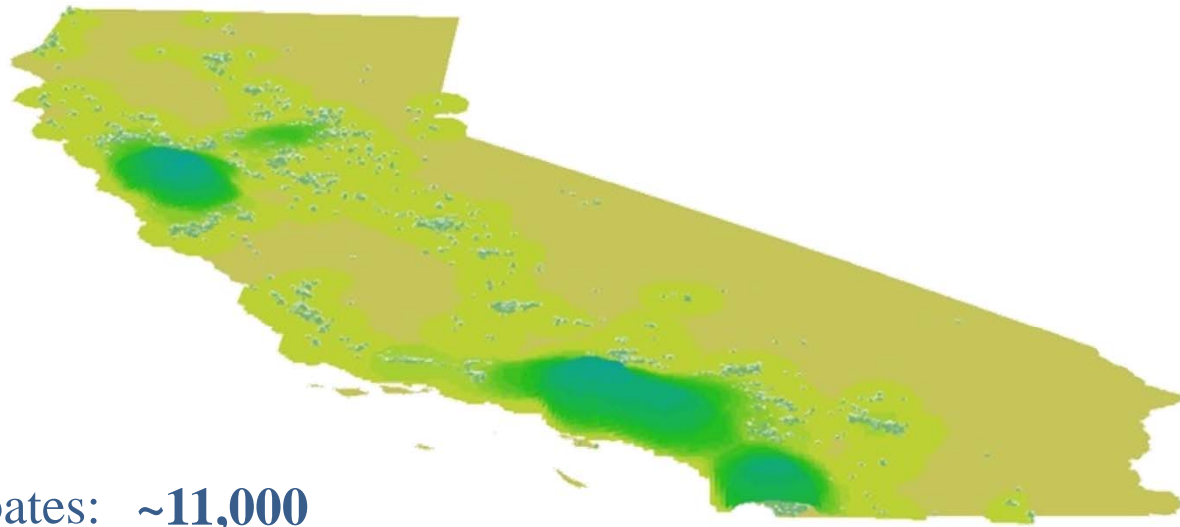
Percent distribution of survey respondents



Percent distribution of rebate recipients



Growth in CVRP Rebates

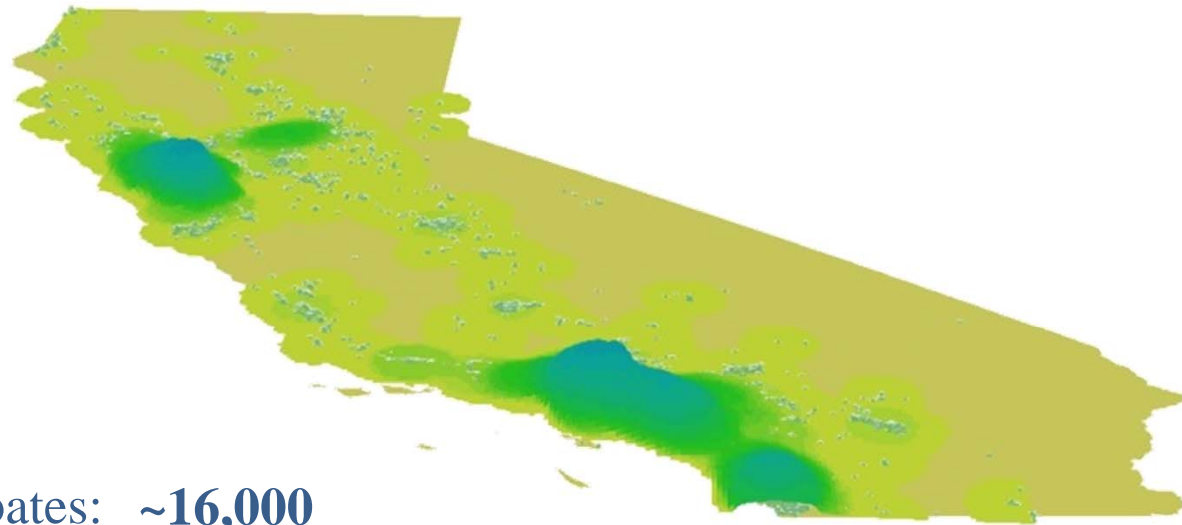


Cumulative Rebates: **~11,000**



Q3 2012	Q4 2012	Q1 2013	Q2 2013	Q3 2013	Q4 2013	Q1 2014

Growth in CVRP Rebates

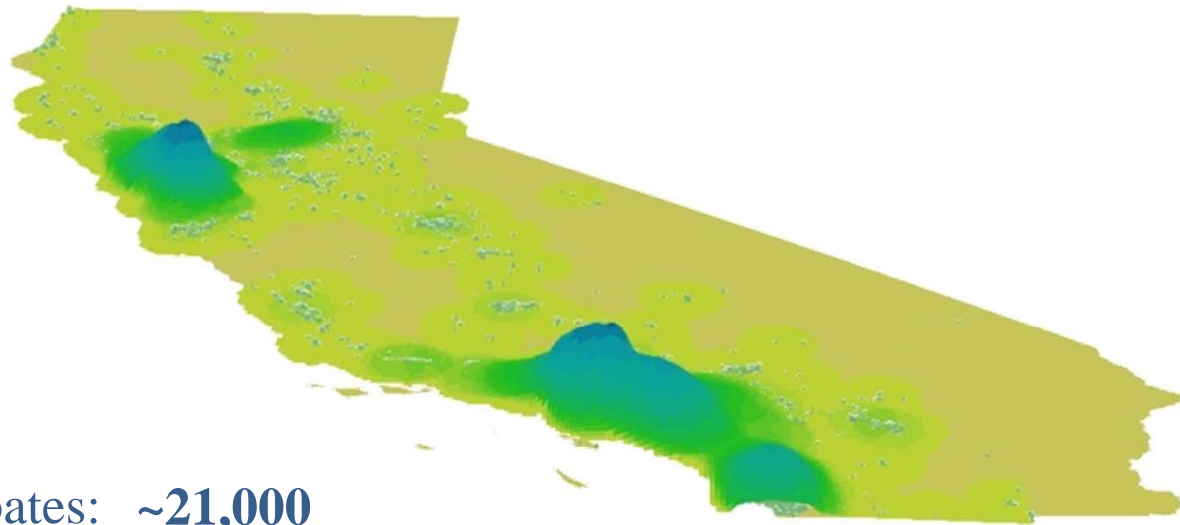


Cumulative Rebates: **~16,000**



Q3 2012	Q4 2012	Q1 2013	Q2 2013	Q3 2013	Q4 2013	Q1 2014
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Growth in CVRP Rebates

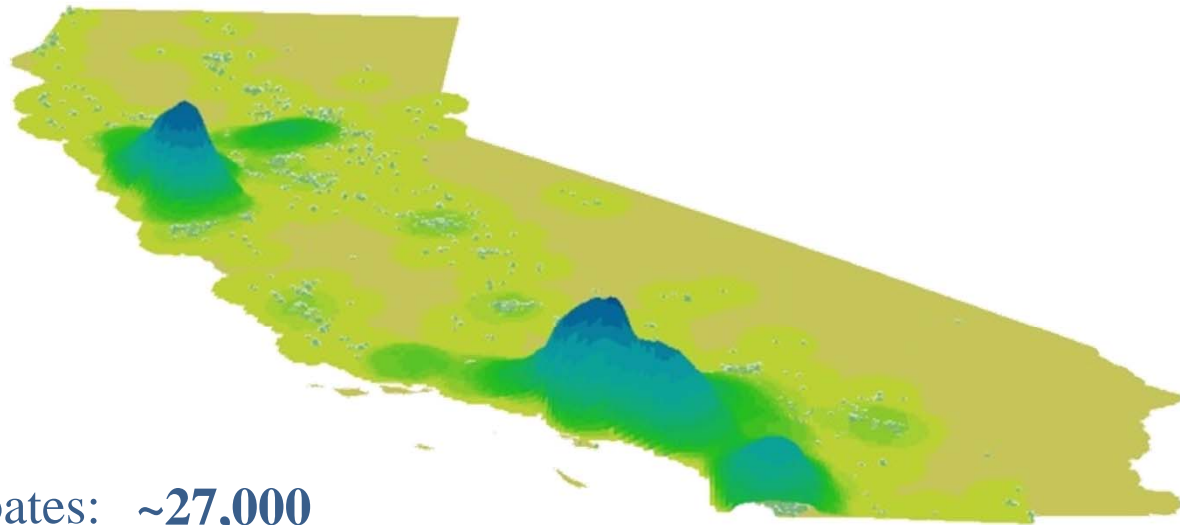


Cumulative Rebates: **~21,000**



Q3	Q4	Q1	Q2	Q3	Q4	Q1
2012	2012	2013	2013	2013	2013	2014

Growth in CVRP Rebates

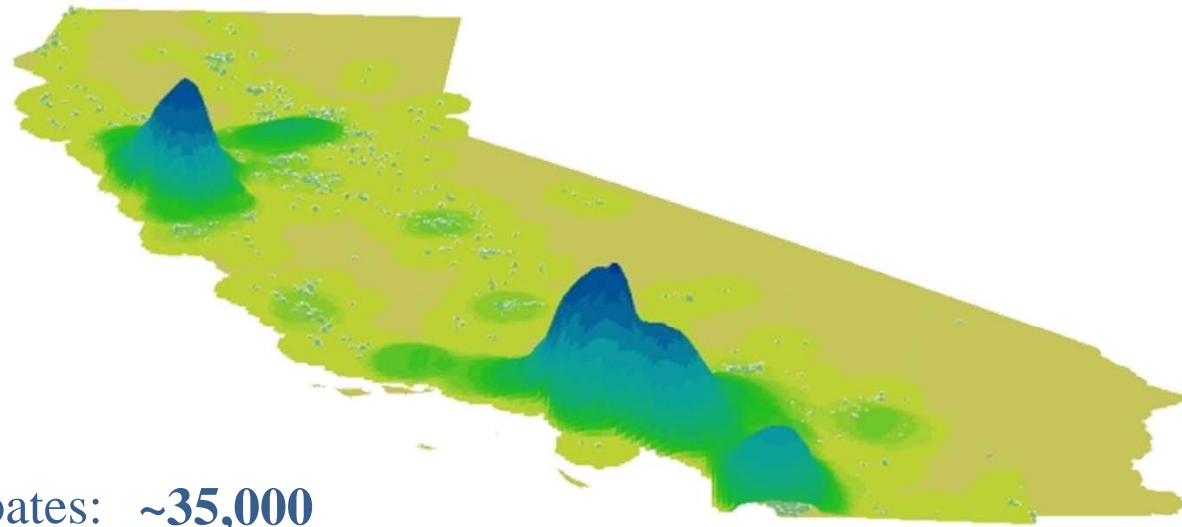


Cumulative Rebates: ~27,000



Q3	Q4	Q1	Q2	Q3	Q4	Q1
2012	2012	2013	2013	2013	2013	2014

Growth in CVRP Rebates

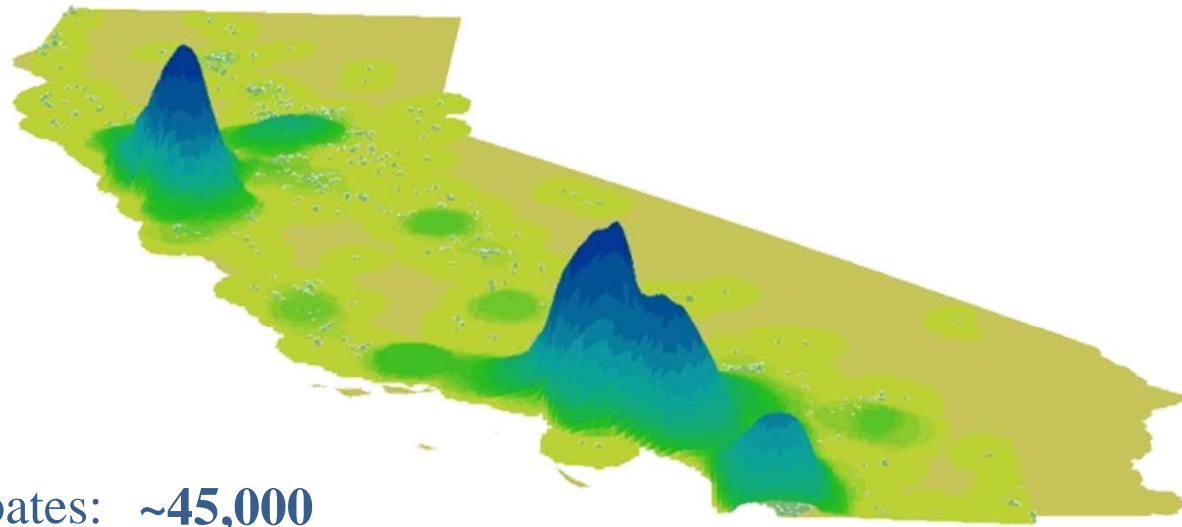


Cumulative Rebates: ~35,000



Q3	Q4	Q1	Q2	Q3	Q4	Q1
2012	2012	2013	2013	2013	2013	2014

Growth in CVRP Rebates

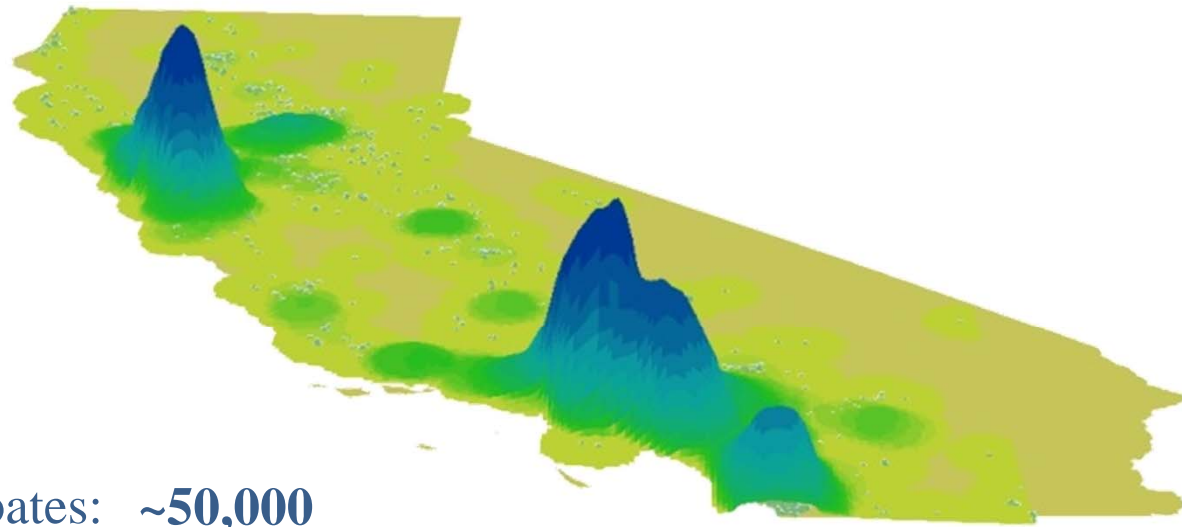


Cumulative Rebates: ~45,000



Q3	Q4	Q1	Q2	Q3	Q4	Q1
2012	2012	2013	2013	2013	2013	2014

Growth in CVRP Rebates

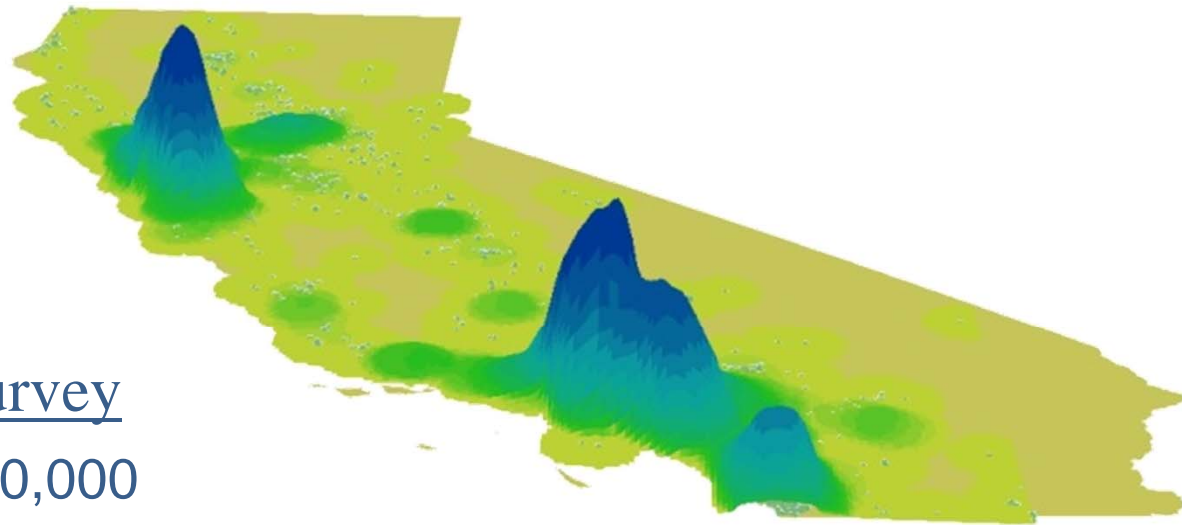


Cumulative Rebates: ~50,000



Q3	Q4	Q1	Q2	Q3	Q4	Q1
2012	2012	2013	2013	2013	2013	2014

Growth in CVRP Rebates



Real-Time Survey

Population: ~40,000

Respondents: ~6,500

Vehicle Purchase Dates:

Q4 2012 - present

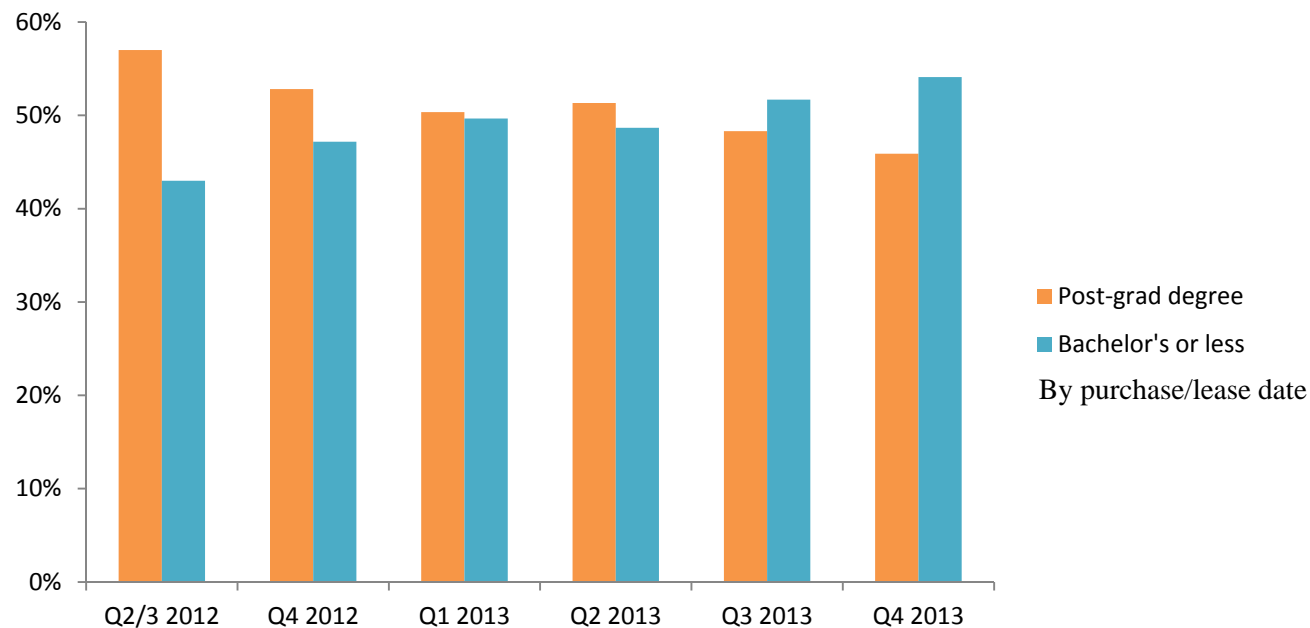
Demographics

No Change:

- Age group
- Gender

Changes:

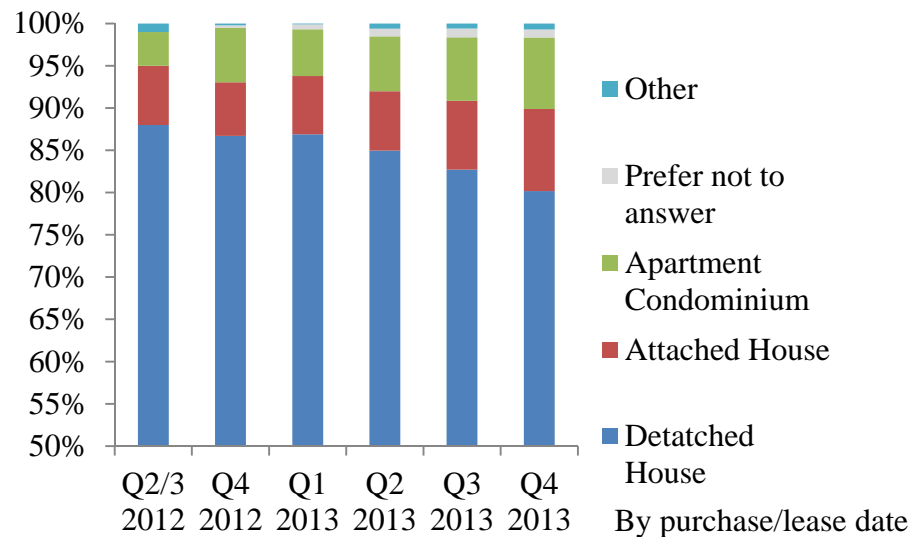
- Highest household education level
11% decline in post-graduate degree
Gradual trend toward lower education levels



Housing Type and Ownership Status

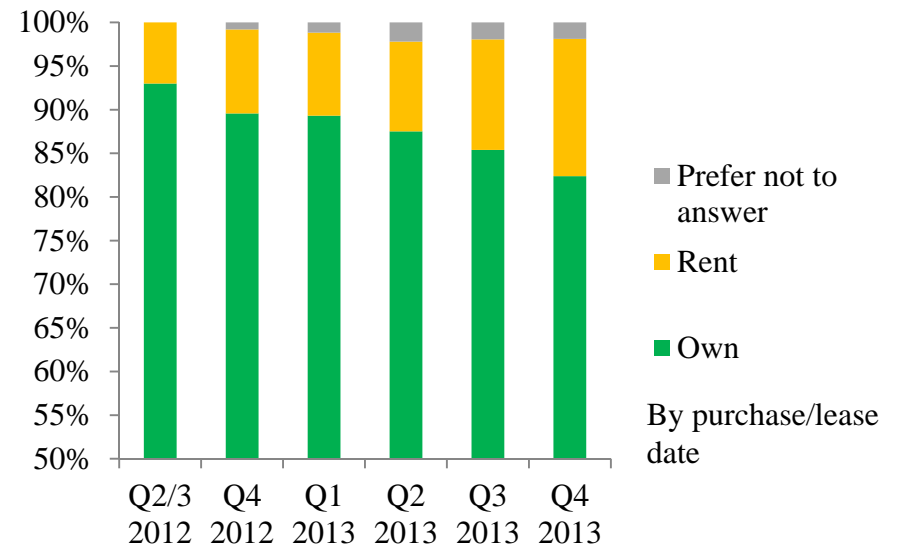
Changes:

- 8% increase in respondents who live in attached homes or MUDs

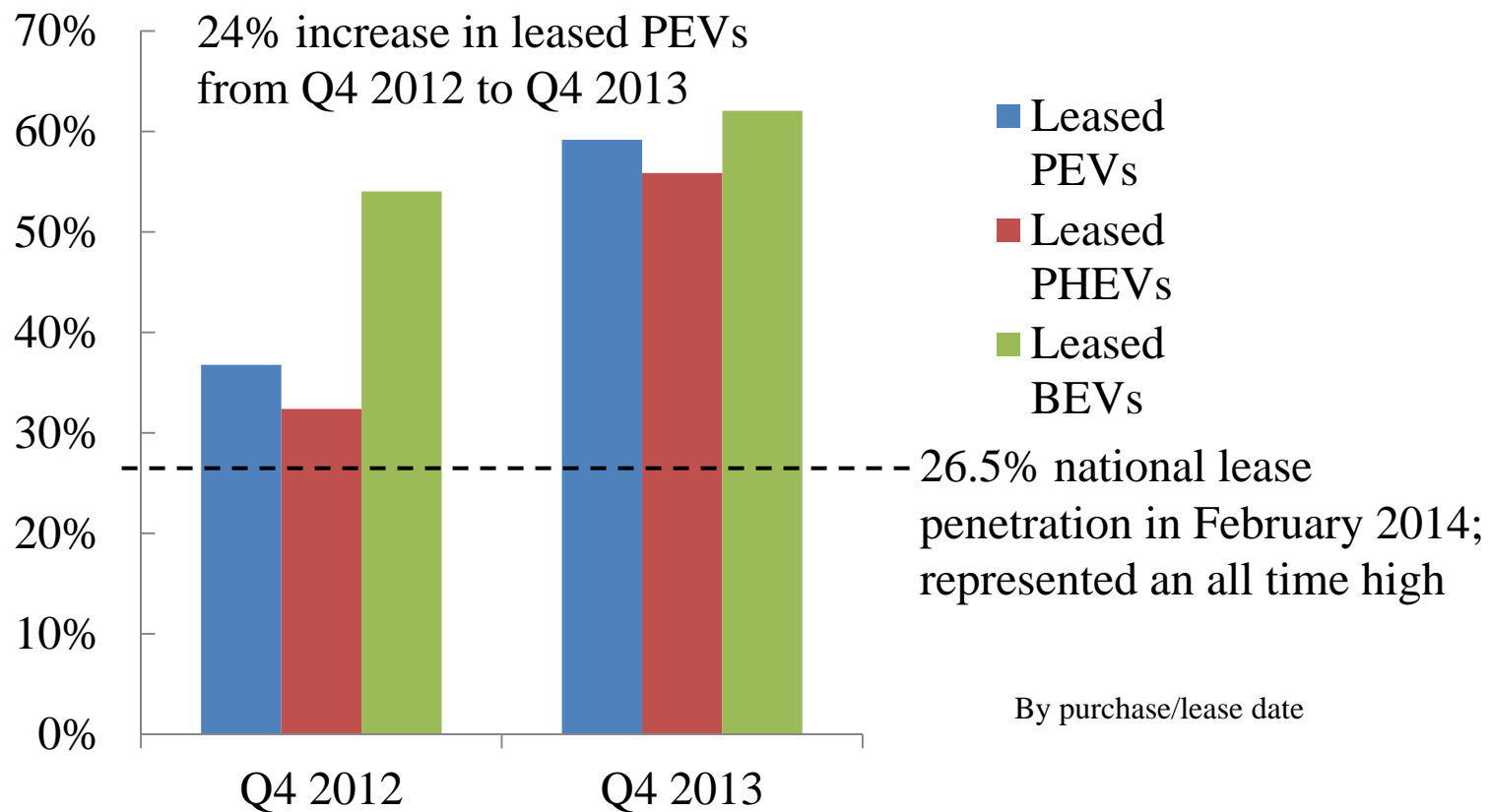


Changes:

- 9% increase in respondents who rent their homes

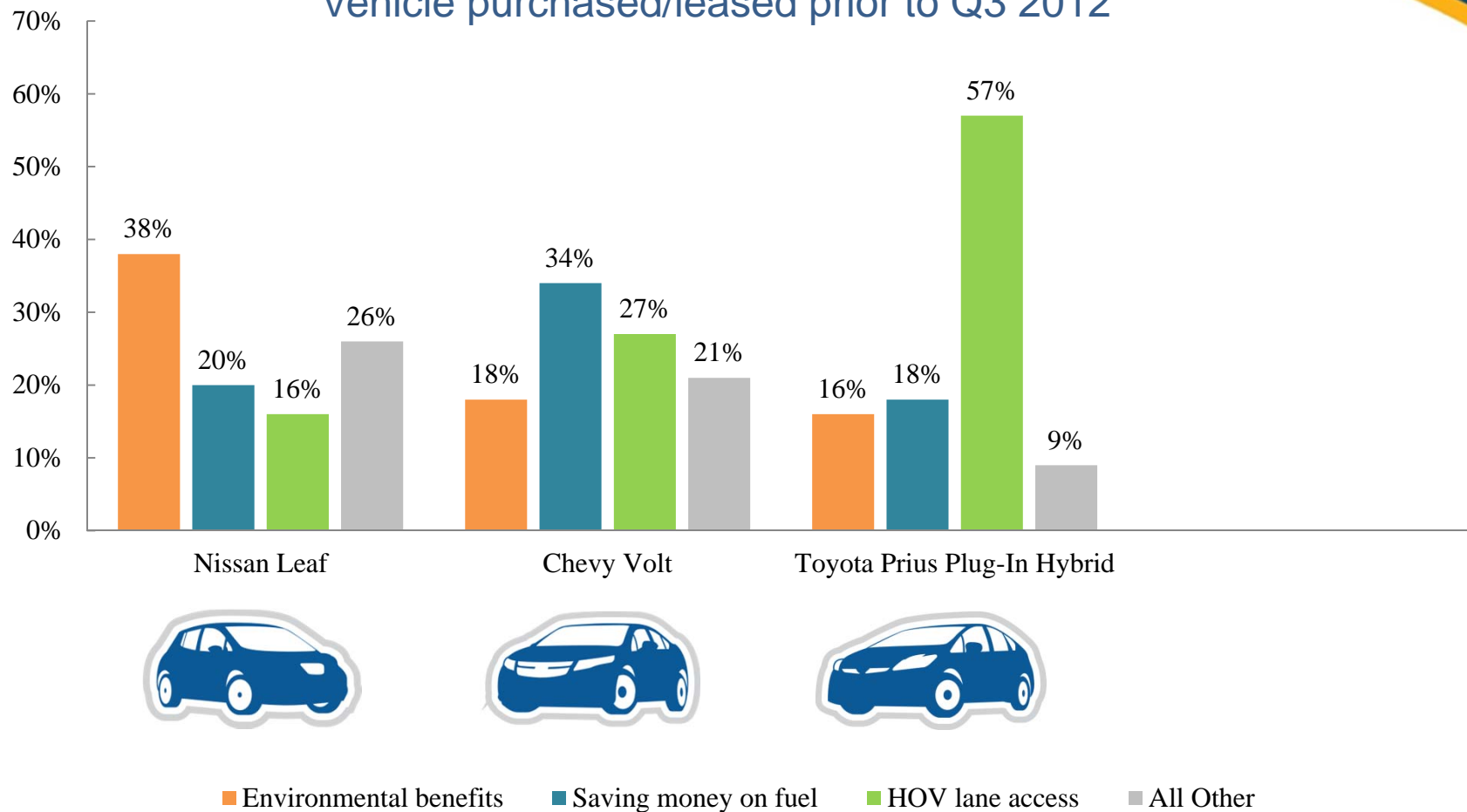


Lease vs. Purchase



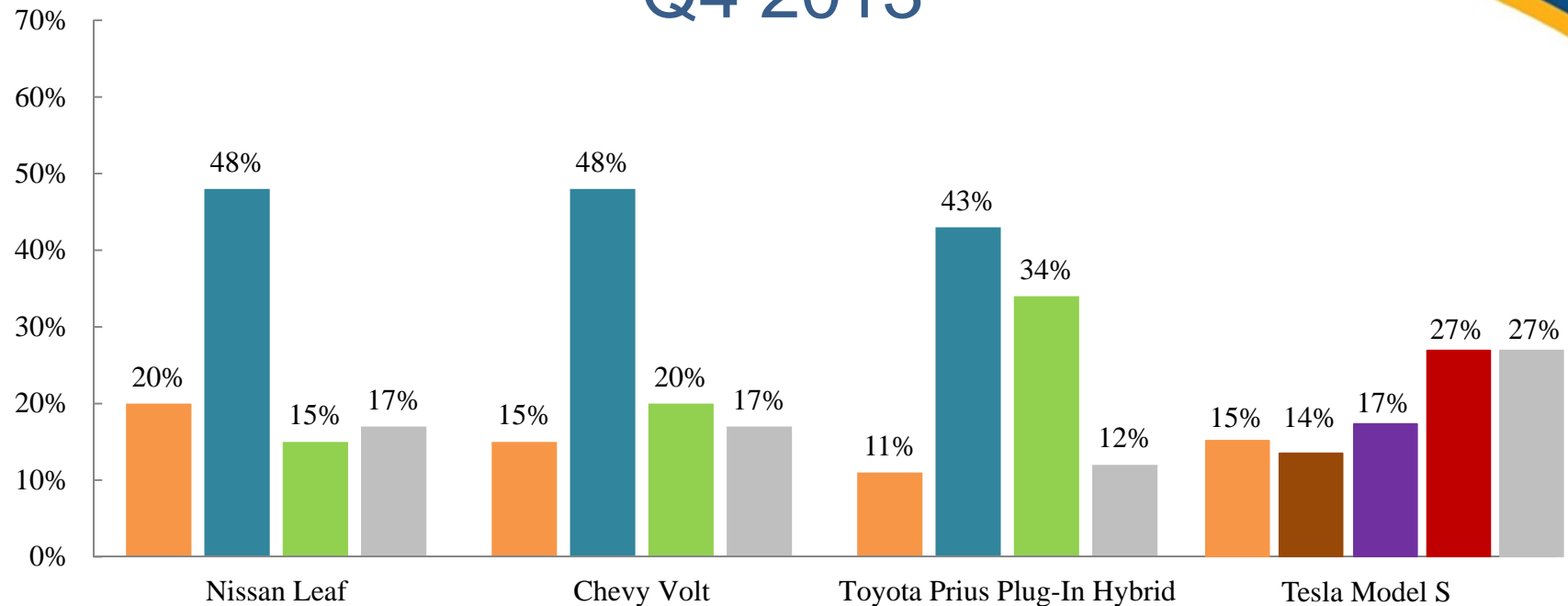
Motivations for Purchase

Vehicle purchased/leased prior to Q3 2012



Motivations for Purchase

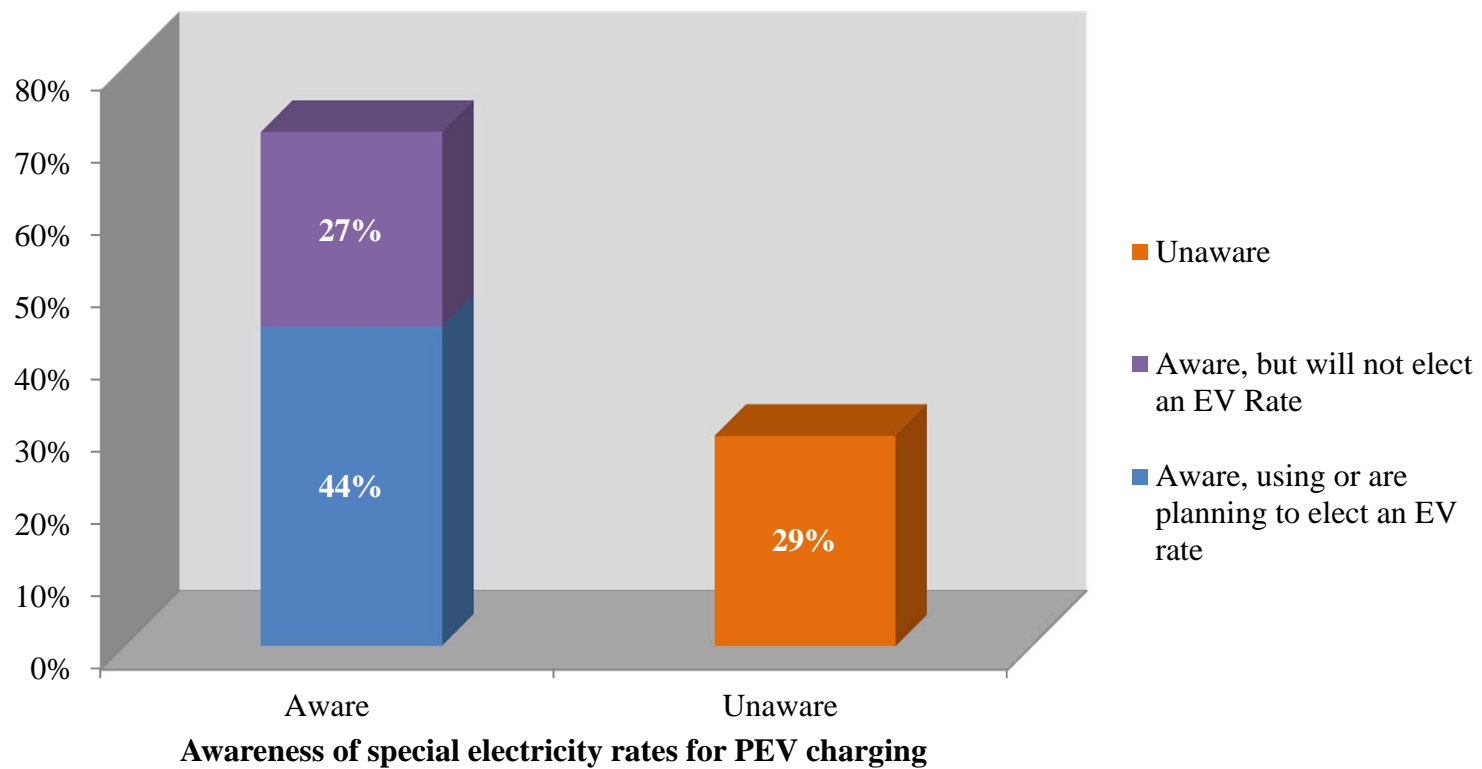
Q4 2013



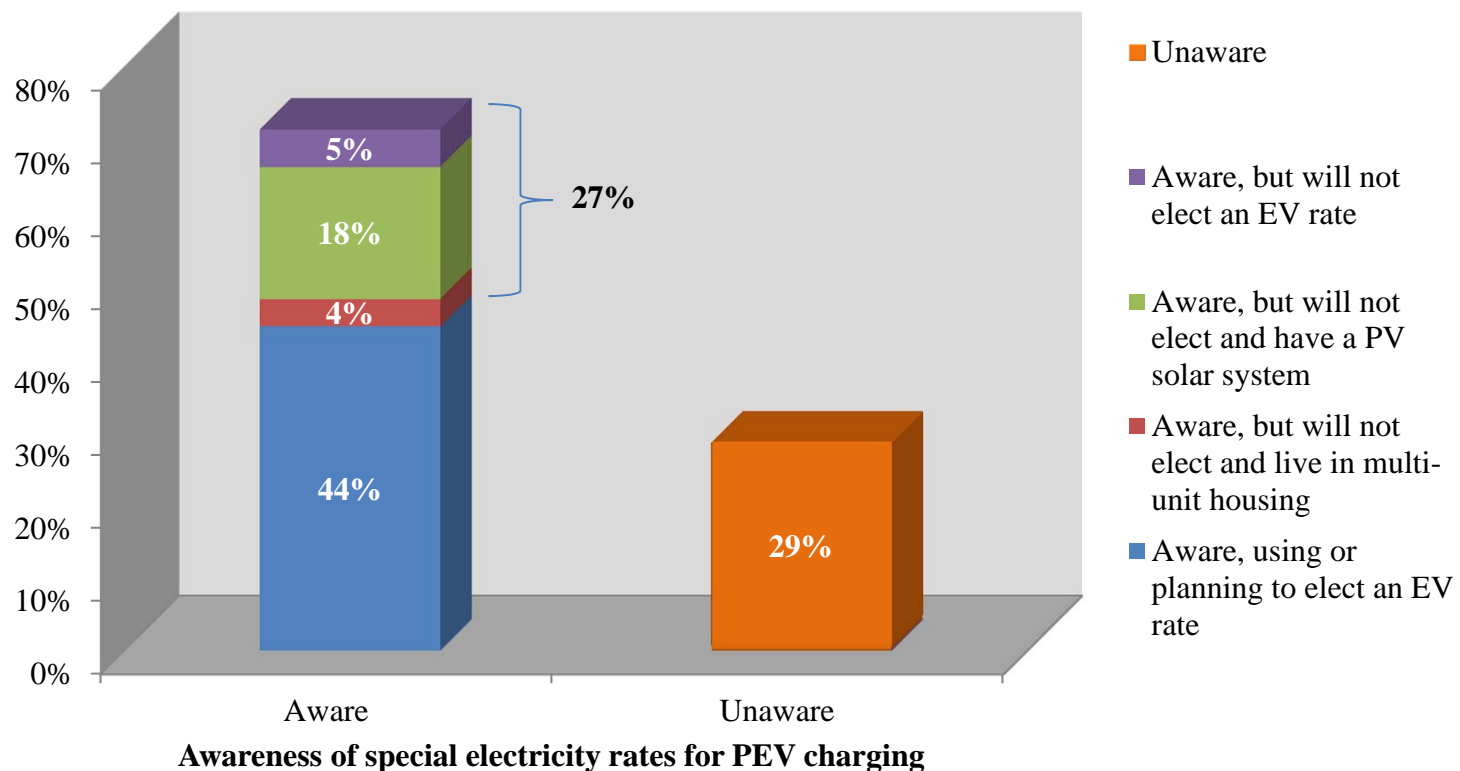
■ Environmental benefits
 ■ Saving money on fuel
 ■ HOV lane access
 ■ All Other

■ Access to new technology
 ■ Energy independence
 ■ Vehicle performance

Awareness of PEV Electricity Rates



Awareness of PEV Electricity Rates



Thank you

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