TRANSPORTATION ENERGY INSTITUTE

Consumer Survey: 2025 Driver Behaviors and Perspectives

July 2025

About this Report

Consumers will be the ultimate decision maker regarding which vehicle technologies or energy options will be most successful. Therefore, it is essential to understand what they think and how they behave to ensure that the solutions being offered to them fit their needs and preferences. For this reason, the Transportation Energy Institute (TEI) frequently commissions or participates in consumer surveys, to provide insight into what consumers are thinking during a given period of time. This white paper presents findings from a 2025 consumer survey supported by the Institute. These results are presented as an additional tool to better understand the driver. As with all surveys, the results reflect how respondents answered questions at a given moment in time. The timing of the annual surveys is deliberate; they are designed to assess consumer sentiment and insights early in the transition to summer-blend fuels often before consumers have observed related price increases linked to the transition.

Methodology

On behalf of the National Association of Convenience Stores (NACS) and TEI, Bold Decision (bold-decision.com) conducted online interviews from Monday May 19 – Wednesday May 21, 2025, among N=1,203 American adults (age 18+, nationwide). The overall margin of error at the 95% confidence interval is +/- 2.83% for interviews among the N=1,203 US adults. Some questions were split-sampled to reduce respondent fatigue, and these findings may total more or less than 100% due to rounding. A list of the questions asked of respondents is included in Appendix B.

About the Data Charts

The results from the survey are presented in this report largely in chart format. Many of the charts were designed to enable comparison of results across key demographic groupings. Where each demographic grouping is presented in a column format, there is a horizontal line included to represent the average of all respondents. This provides a benchmark against which the reader can compare each demographic group against the average of all consumers in the survey, enabling quick visual recognition of demographic groups that deviate from the average.

Demographic groups included in the analysis were identified by the respondent and include:

- Gender
- Age (18 – 34, 35 – 49, 50 – 64, and 65 year or older)
- Geographic Region (Northeast, Midwest, South, West)
- Community Type (Urban, Suburban, Rural)
- Education Level (High school or less, Some college, College or more)
- Household Income (Less than $50,000/year, $50,000 - $100,000/year, More than $100,000/year)
- Commute Behavior (Commute Daily, Commute but Not Daily, Do Not Commute/Work from Home)

Contents

Consumers Remain Concerned about Fuel Prices

Even though prices during the survey were more than 40 cents lower than last year, **72%** still said price is most the important factor when decided where to buy gas.

<u>To save 5 cents per gallon</u>:

- 57% would turn left across a busy intersection
- **69% would drive 5 minutes out of their way**
- 54% would drive 10 minutes out of their way

Most Are Pessimistic About Buying/Leasing a Vehicle

- **50% think now is a bad time to buy/lease**
- 64% think prices will be higher next year
- Only 39% are likely to buy/lease within two years.

Of those consumers who might buy/lease:

- 82% are likely to consider a gas vehicle
- **37% are likely to consider a HEV**
- 28% are likely to consider a BEV or PHEV

Consumers are Increasingly Positive About EVs

- 44% have a positive attitude towards EVs
- **31% are more positive than last year**
- 53% believe they have a place to charge at home
- **41% said it would be easy to find a public charger**

Market Conditions

To better understand the perspective of consumers responding to the survey, it might be helpful to remind the reader what the prevailing market conditions were like during the time the survey was conducted.

At the time of the survey, the average national retail price of gasoline was $3.189, compared with $3.601 the year before at this time. At the same time, West Texas Intermediate crude oil was trading on the spot market for $63.94, compared with $80.61 the year before.

The U.S. Consumer Sentiment survey, conducted by the University of Michigan[1], was measured on May 16, 2025, and indicated a sentiment index of 50.8, continuing a five-month decline. (It is worth noting that by the end of May, the index was adjusted to 52.2, equal to the preceding month.) Unemployment was at 4.2%, which was relatively consistent with trends over the past 12 months.

[1] https://tradingeconomics.com/united-states/consumer-confidence; https://www.sca.isr.umich.edu/

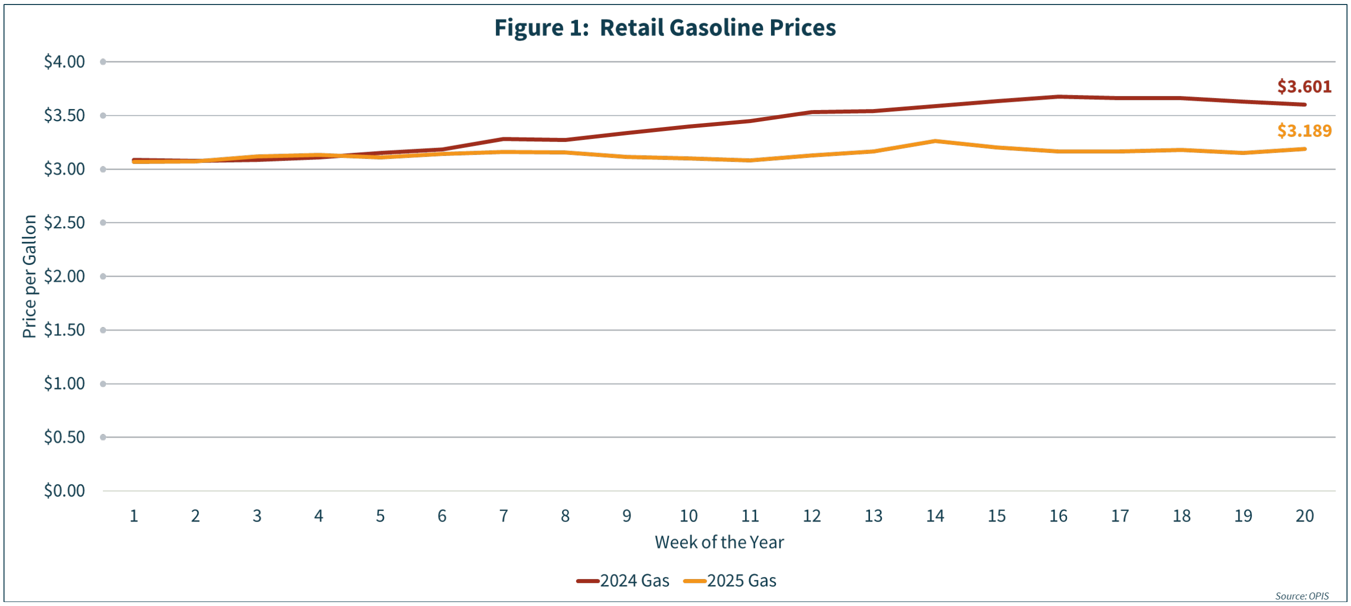


Figure 1: Retail Gasoline Prices
$4.00
$3.50
$3.00
$2.50
$2.00
$1.50
$1.00
$0.50
$0.00
Price per Gallon
$3.601
$3.189
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20
Week of the Year
2024 Gas
2025 Gas
Source: OPIS

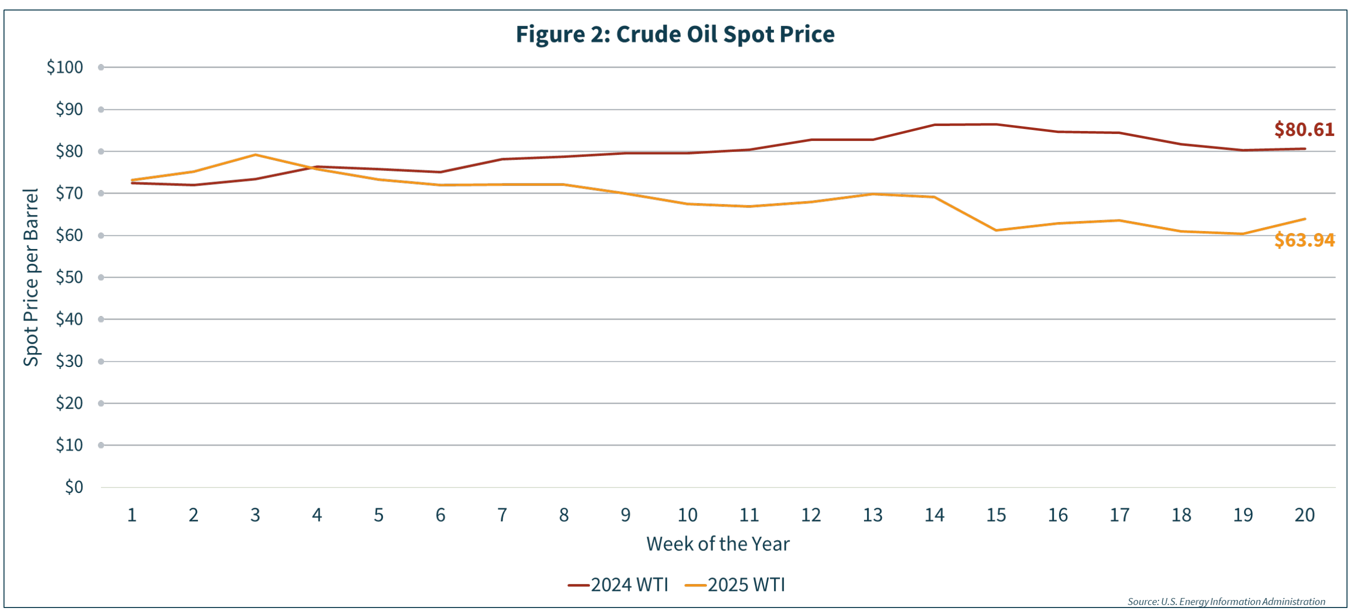
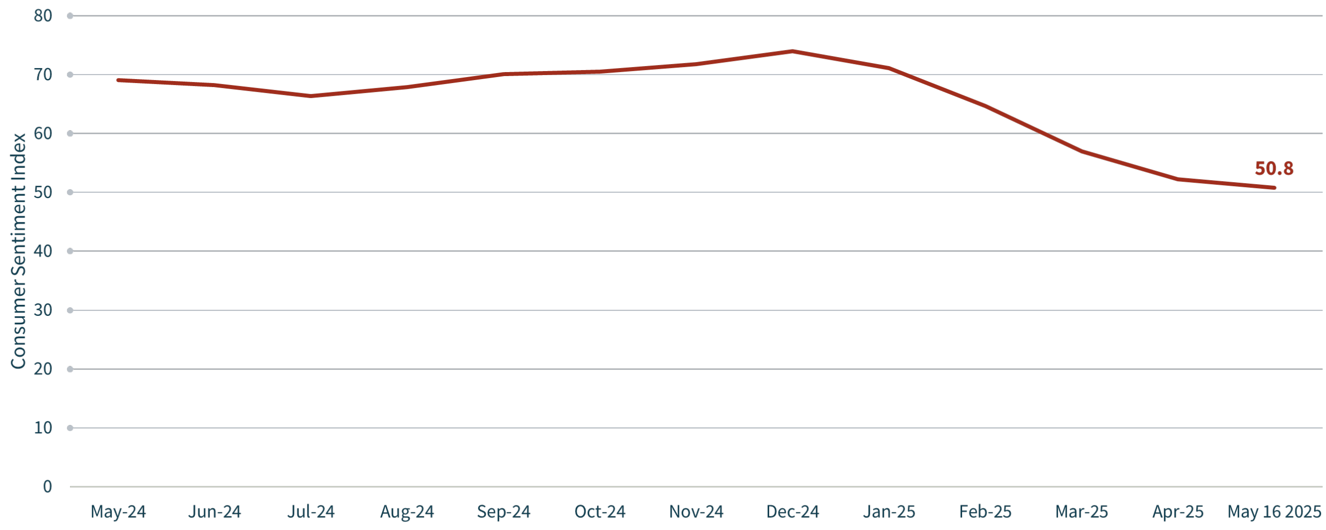


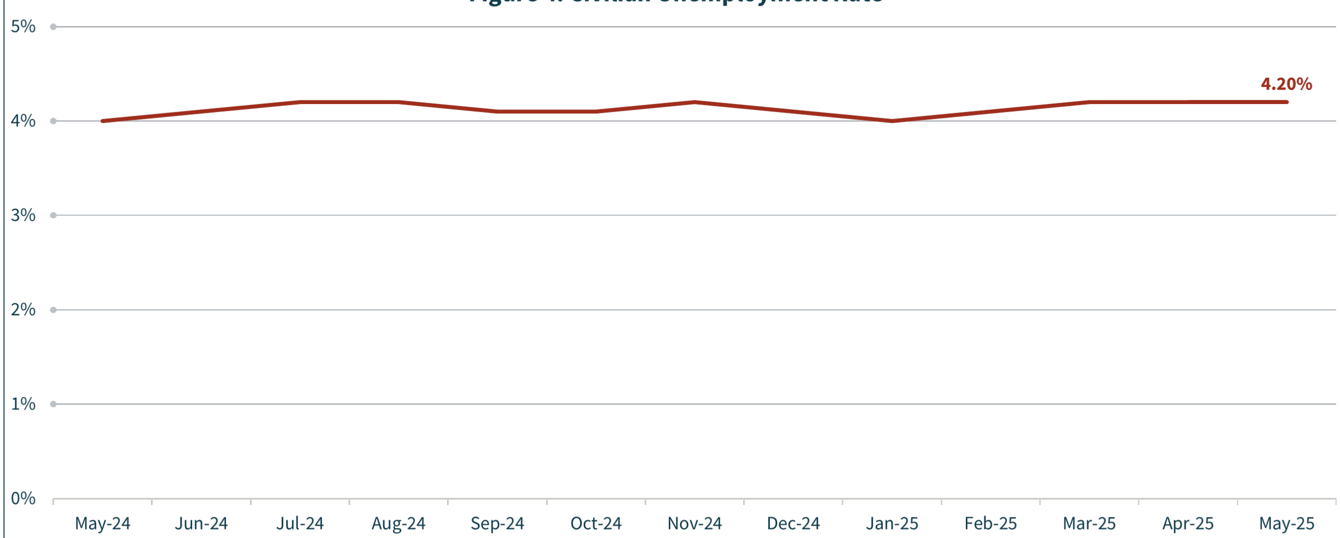
Figure 2: Crude Oil Spot Price
$100
$90
$80
$70
$60
$50
$40
$30
$20
$10
$0
Spot Price per Barrel
$80.61
$63.94
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20
Week of the Year
2024 WTI
2025 WTI
Source: U.S. Energy Information Administration

Figure 3: U.S. Michigan Consumer Sentiment



Source: https://tradingeconomics.com/united-states/consumer-confidence

Figure 4: Civilian Unemployment Rate



Source: U.S. Bureau of Labor Statistics

Economic Sentiment and Gasoline Prices

As presented in the introduction, the University of Michigan Consumer Sentiment Index, which measures consumer confidence in the economy, decreased five months in a row up until the dates this survey was executed. In the survey TEI supported, consumers were also asked about their feelings about the economy and how fuel prices affected these sentiments. In general, 43% of consumers were somewhat/very optimistic while 57% were somewhat/very negative about the economy. Pessimism was stronger among women, younger consumers and those who said they did not commute to work each day. Economic sentiment shifted slightly since March 2024, when 45% of consumers were optimistic and 55% were pessimistic.

When asked to what extent gasoline prices affected their feelings about the economy, 79% said gas prices had some/great impact on their feelings while 21% said they had little/no impact. This is down from last year when 85% said prices had some/great impact on their feelings, perhaps reflecting the lower fuel prices in the market during the time the survey was collected this year.

Gas prices had the most significant impact on younger consumers, 43% of whom said they had a “Great Impact” on their feelings about the economy. In addition, 68% of consumers said gas prices had some/great impact on their driving decisions, with 40% of younger consumers saying they had a “Great Impact” on their decisions.

Overall, 46% of consumers said they are driving less than they drove last year, with 16% saying “Much Less.” Only 20% said they are driving more. Younger consumers, those with less than a college degree and those making less than $50,000 per year have reduced their driving the most, with each demographic group driving less than half as much as last year. More than two-thirds (68%) of those driving less attributed that to gas prices while those driving more attributed it to more errands (58%) or more activities (47%).

Figure 5: How do you feel about the economy?

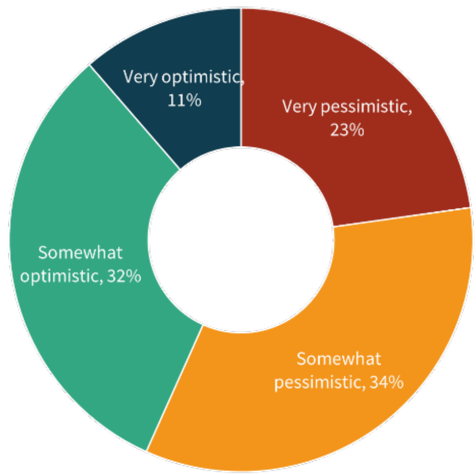
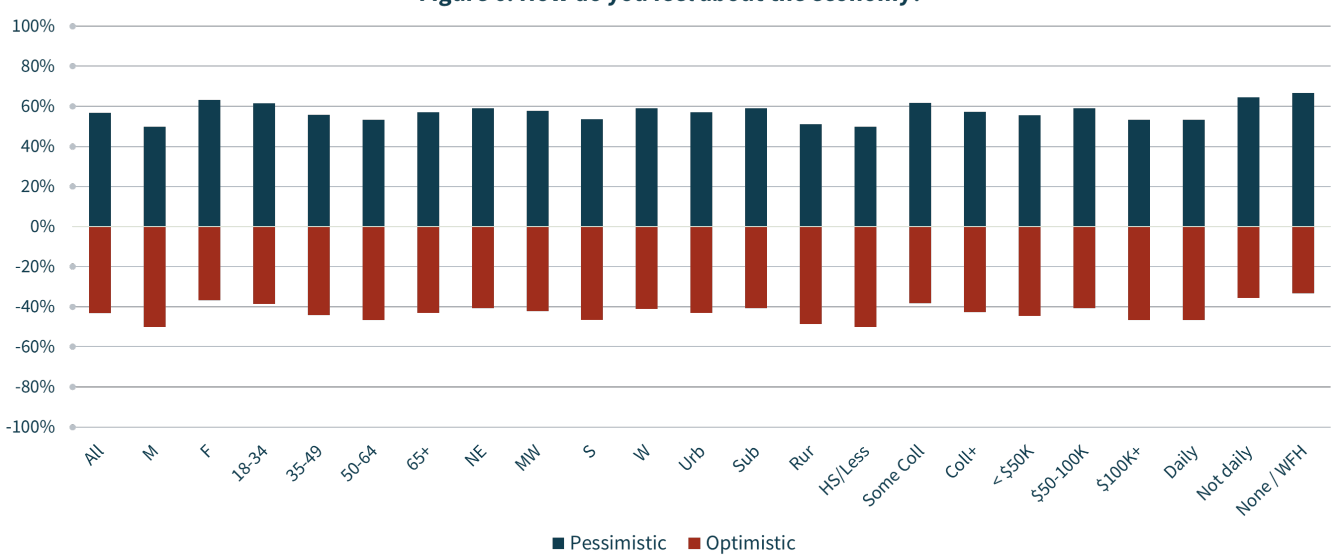


Figure 6: How do you feel about the economy?



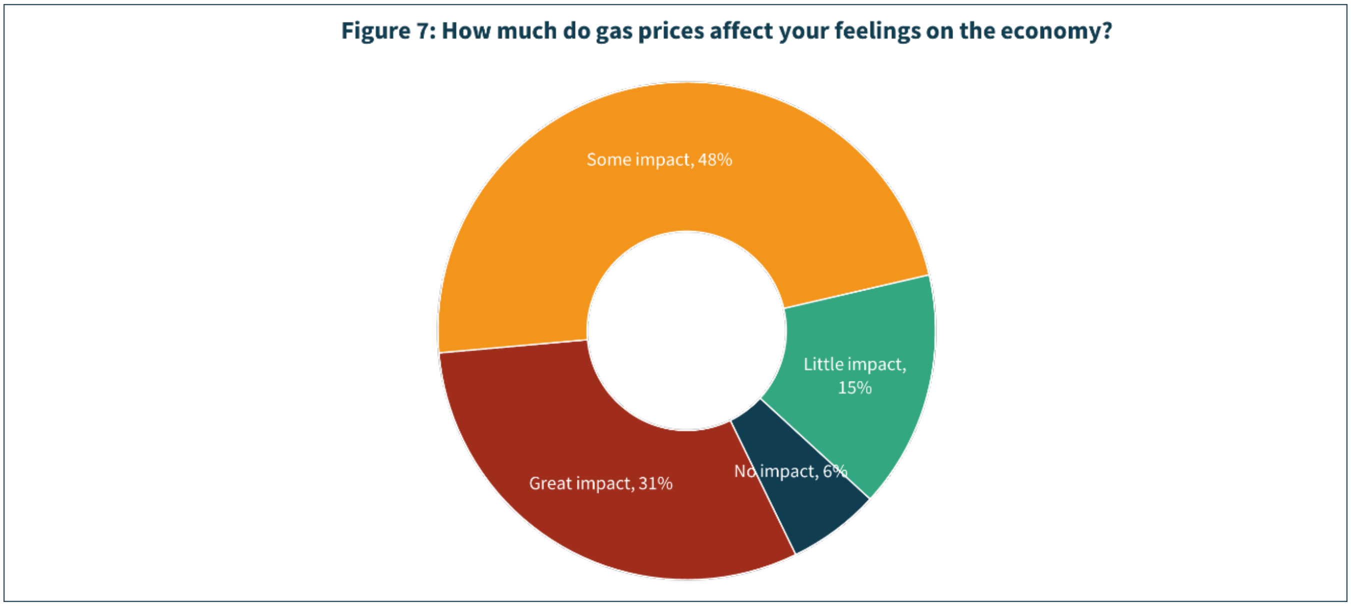


Figure 7: How much do gas prices affect your feelings on the economy?
Some impact, 48%
Little impact, 15%
No impact, 6%
Great impact, 31%

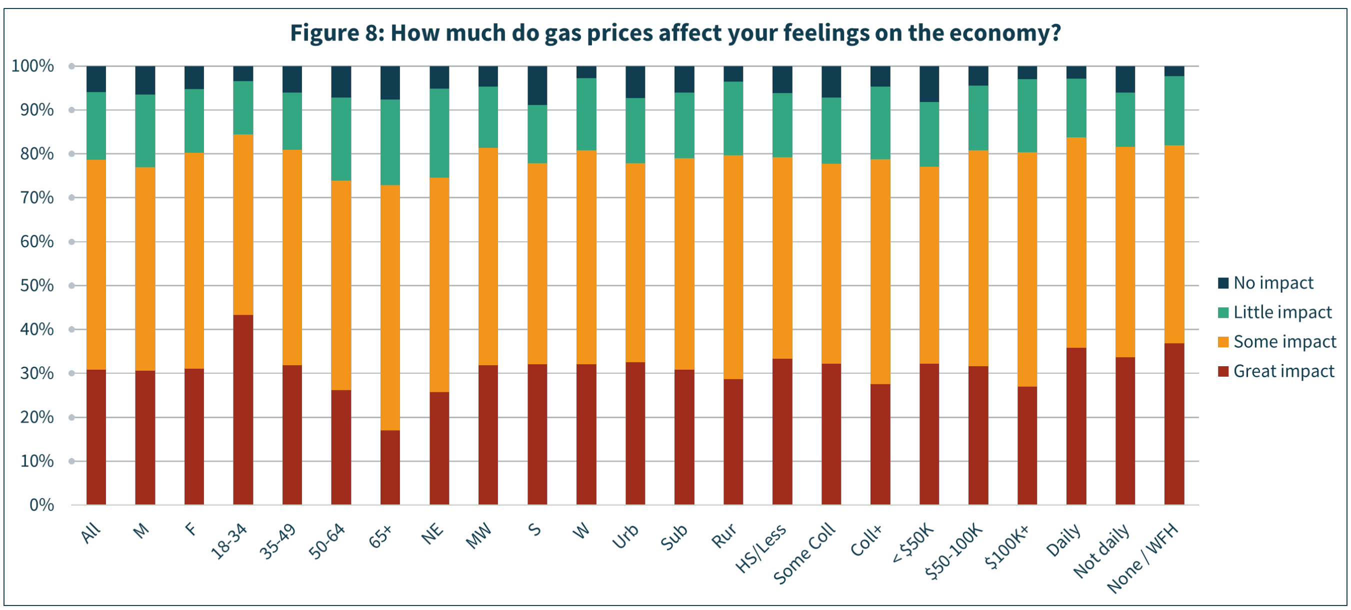


Figure 8: How much do gas prices affect your feelings on the economy?
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
All
M
F
18-34
35-49
50-64
65+
NE
MW
S
W
Urb
Sub
Rur
HS/Less
Some Coll
Coll+
< $50K
$50-100K
$100K+
Daily
Not daily
None / WFH
No impact
Little impact
Some impact
Great impact

Figure 9: How much does the price of gas impact your driving decisions?

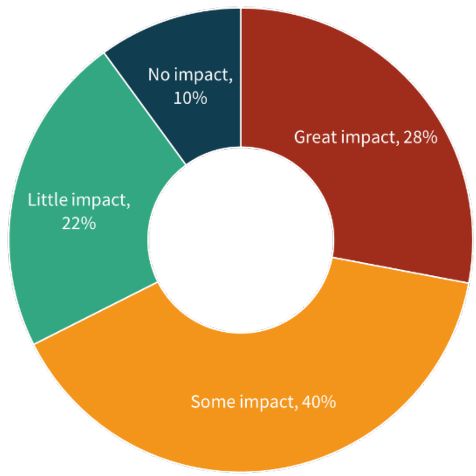


Figure 10: How much does the price of gas impact your driving decisions?

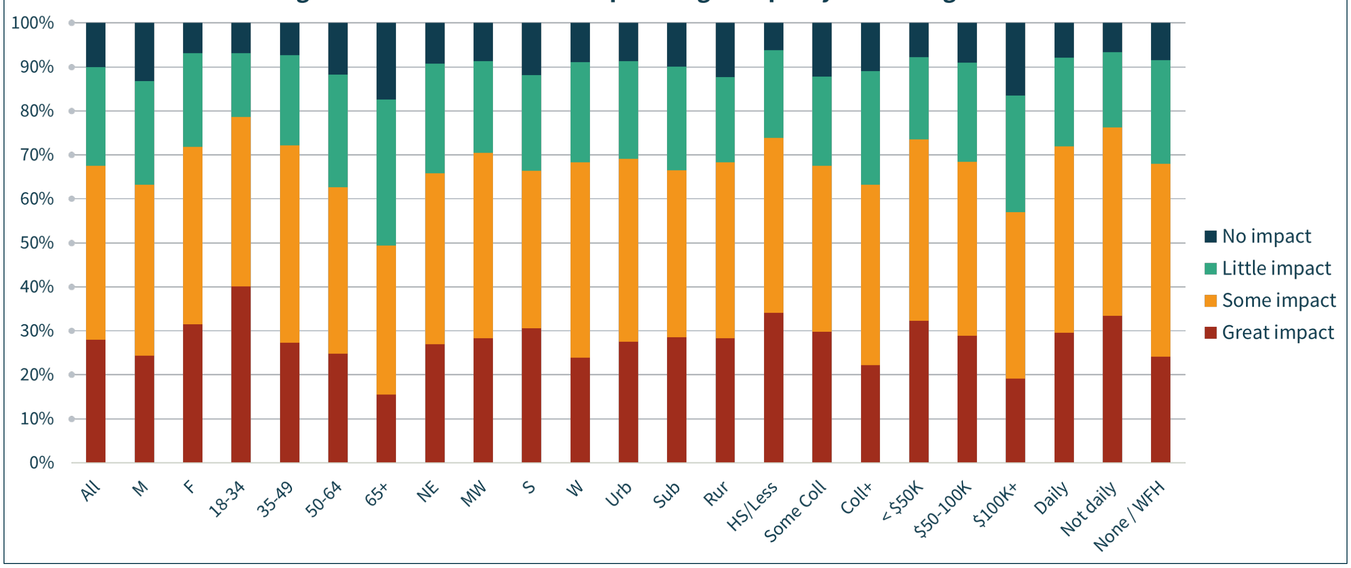


Figure 11: Compared to last year, would you say the amount you drive has changed?

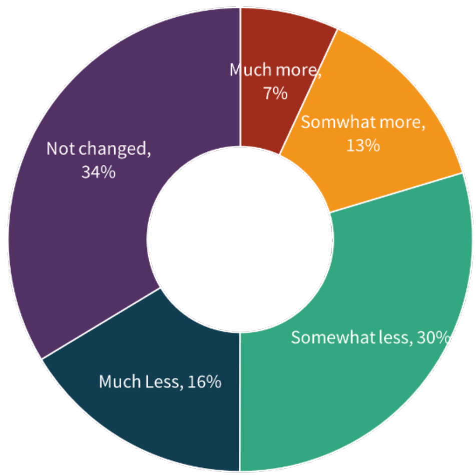


Figure 12: Compared to last year, would you say the amount you drive has changed?

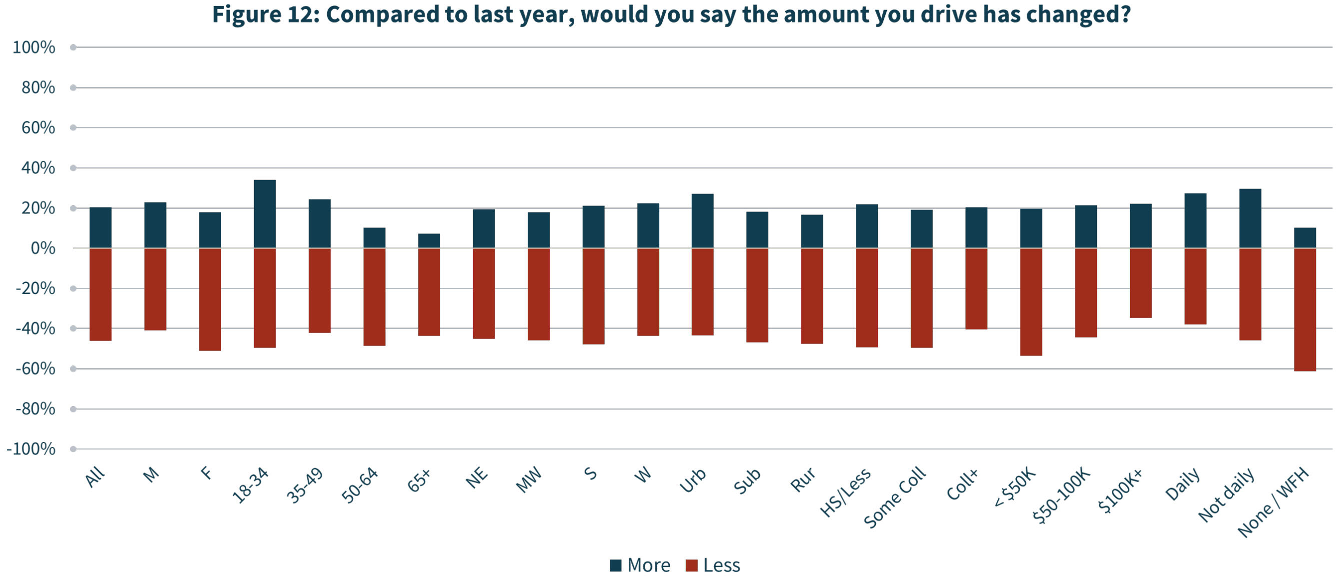


Figure 13: Why do you drive more than you did last year?

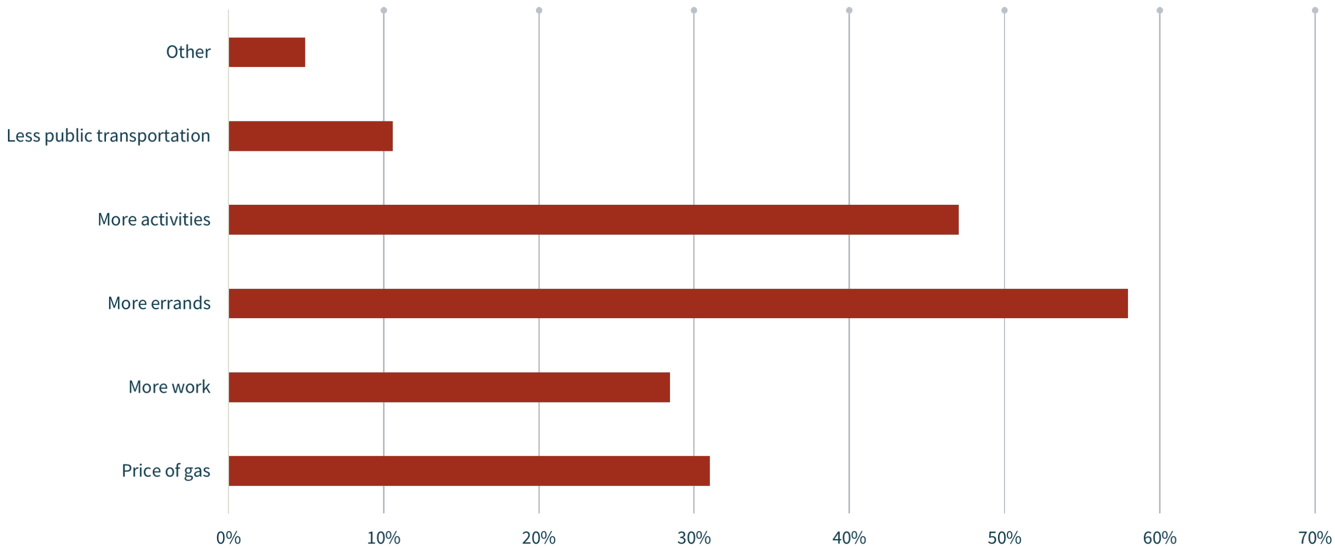
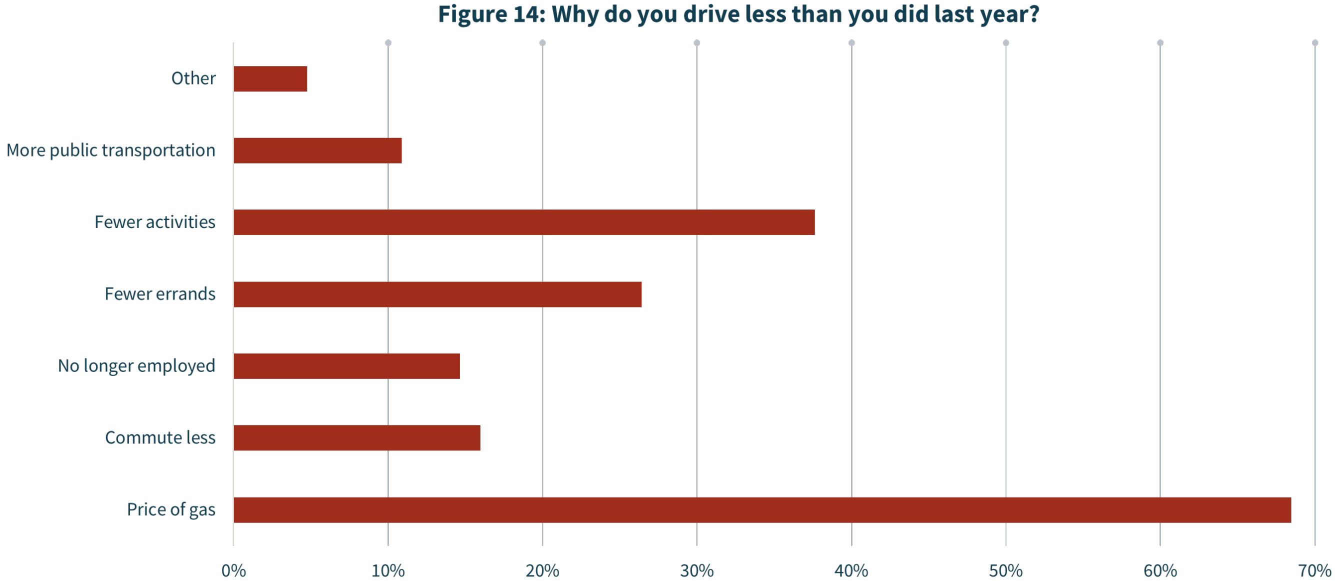


Figure 14: Why do you drive less than you did last year?



Gas Purchasing Behavior and Price Sensitivity

Vehicles equipped with internal combustion engines (ICE) represent more than 98% of vehicles in operation[2], so understanding how drivers purchase fuel and what motivates their decisions is important when understanding the transportation energy sector. More than half of consumers (54%) said they purchase gasoline for a vehicle at least once per week, and another 24% said they purchase gas a few times per month. When they purchase gasoline was pretty evenly split between morning (25%), mid-day (33%) and afternoon (32%) and 81% of consumers pay for their purchase with either a credit or debit card. Convenience stores were the preferred retailer of gasoline, with 61% of consumers saying this is where they most often purchase gasoline[3].

Even though lower than last year, gas prices remained the number one factor when consumers select where to buy fuel, with 72% of consumers saying this was the most important factor. This was relatively consistent across demographic groups, with only those making more than $100,000 per year ranking it less than 60%. To that point, 59% of consumers said they prefer a certain gas station or chain and 58% of them said their preference was driven by lower prices, 56% said location, 50% said quality of fuel and 41% said it was because of the store's loyalty program. Overall, 53% of consumers said a convenience store could earn more of their business if they lowered gas prices, followed distantly (25%) by lowering in-store prices.

Consistent with decades of results from consumer surveys, drivers are willing to inconvenience themselves to save money at the pump. When asked if they would do certain things to save 5 cents per gallon, 57% said they would turn left across a busy intersection, 69% said they would drive 5 minutes out of their way, and 54% said they would drive 10 minutes out of the way.

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[2] According to Statista, there were 292.3 million vehicles in operation in the United States at the end of 2024. According to Argonne National Laboratory, there were 5.7 million battery electric and plug-in hybrid electric vehicles in operation, for a combined market share of 1.95%, leaving 98.05% pure combustion or hybrid. Recognizing PHEVs are equipped with an ICE, the share of vehicles in operation is greater than 98.05%. https://www.statista.com/statistics/859950/vehicles-in-operation-by-quarter-united-states/; https://www.anl.gov/ev-facts/model-sales

[3] The survey asked "Where do you most often buy gas?" and provided respondents with three options – 1) a convenience store that sells gas; 2) a service station that has a very limited store or no store for snacks/drinks; 3) a big-box retailer like Costco or Walmart that sells fuel

Figure 15: How often do you buy gas for a vehicle?

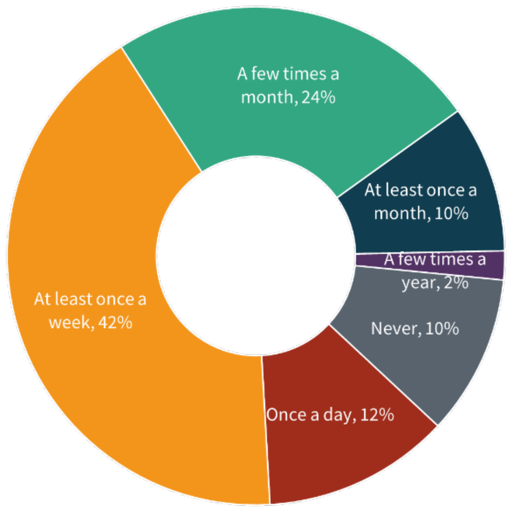


Figure 16: What time of day do you most often purchase gas?

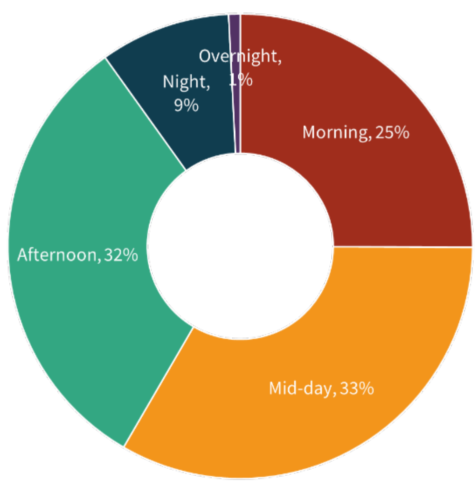


Figure 17: Which method do you typically use to purchase gas?

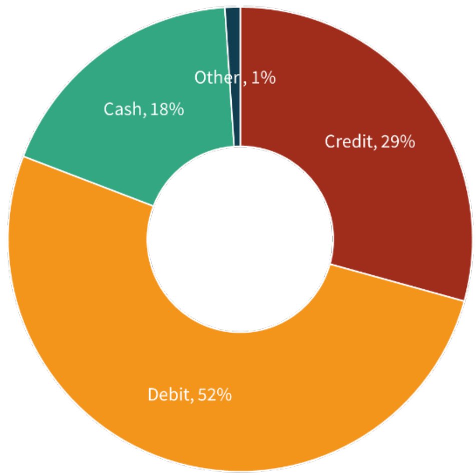
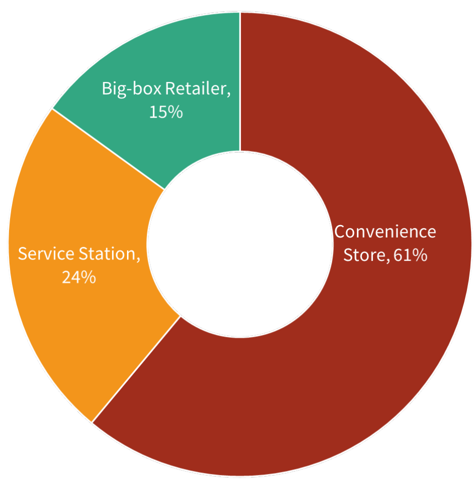


Figure 18: Where do you most often buy gas?



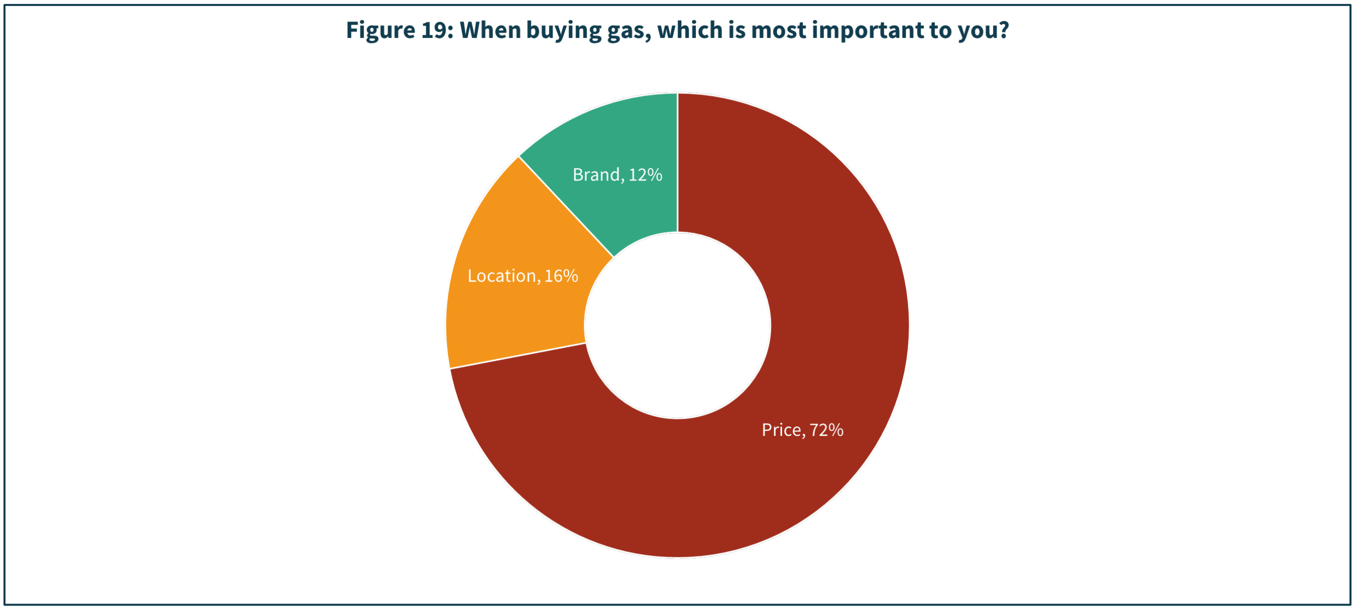


Figure 19: When buying gas, which is most important to you?
Brand, 12%
Location, 16%
Price, 72%

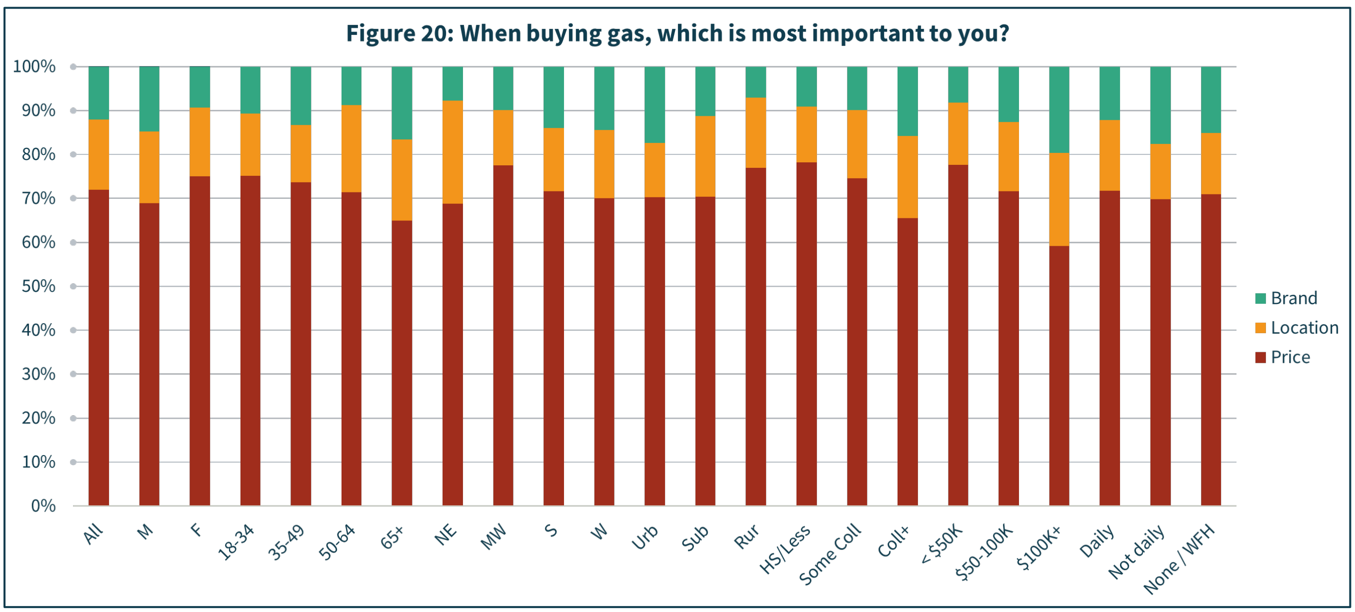


Figure 20: When buying gas, which is most important to you?
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
All
M
F
18-34
35-49
50-64
65+
NE
MW
S
W
Urb
Sub
Rur
HS/Less
Some Coll
Coll+
< $50K
$50-100K
$100K+
Daily
Not daily
None / WFH
Brand
Location
Price

Figure 21: Why do you prefer a certain gas station or chain?

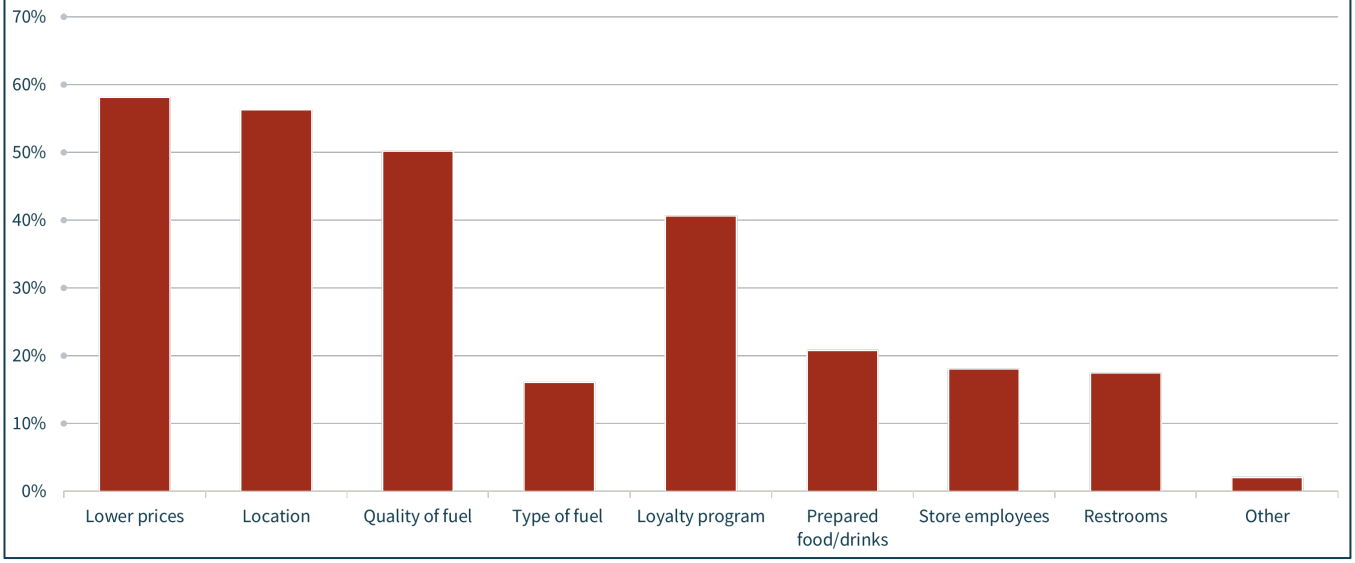


Figure 22: What could a convenience store do to get more of your business?

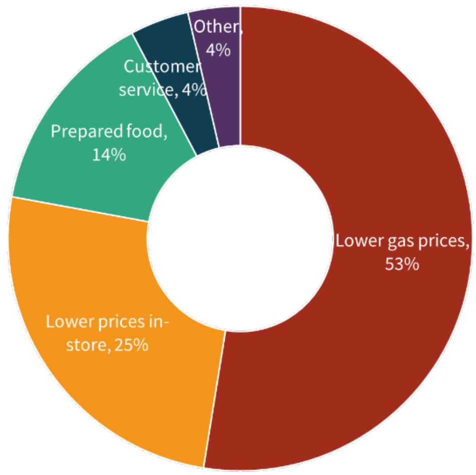


Figure 23: What could a convenience store do to get more of your business?

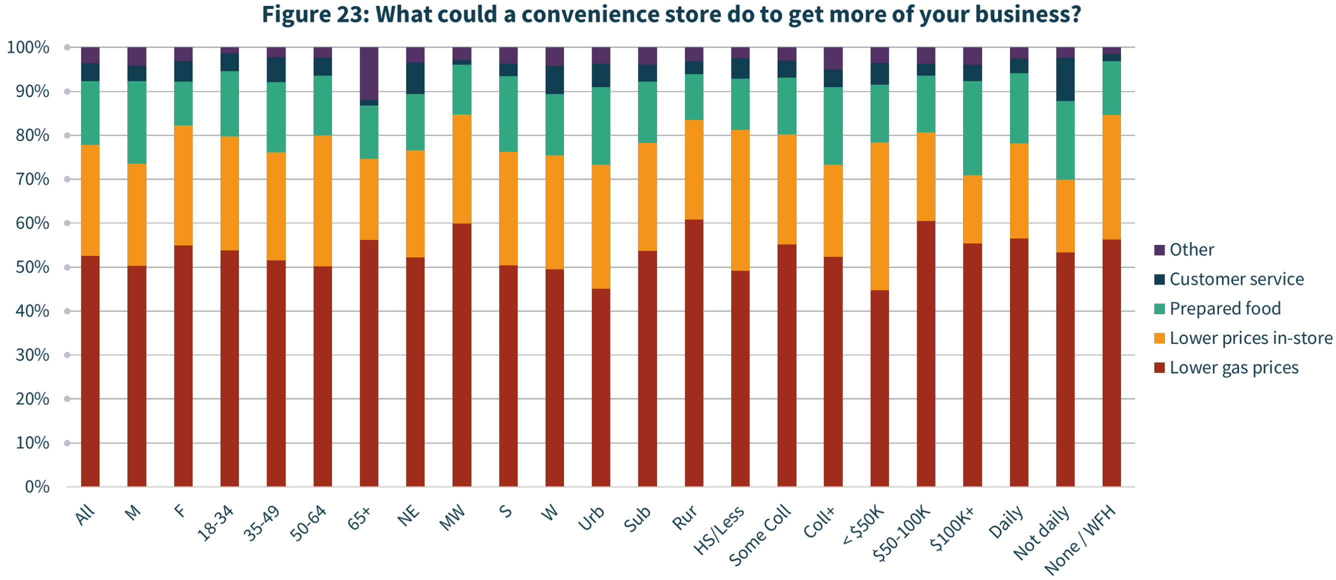


Figure 24: To save 5 cpg, I would turn left across a busy street

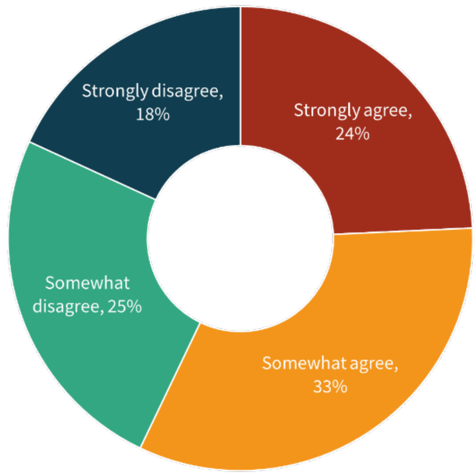


Figure 25: To save 5 cpg, I would drive 5 minutes out of my way

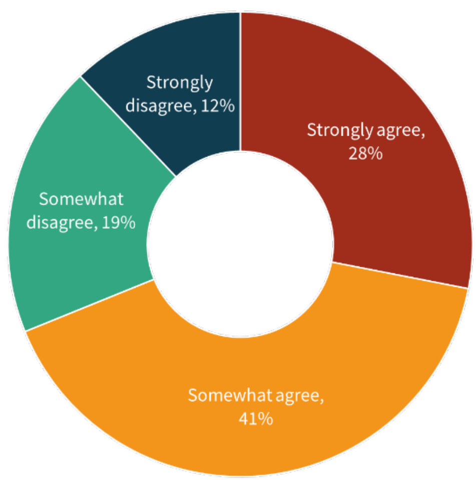


Figure 26: To save 5 cpg, I would drive 10 minutes of my way

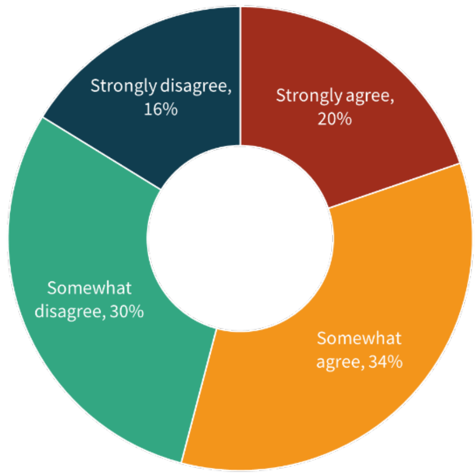
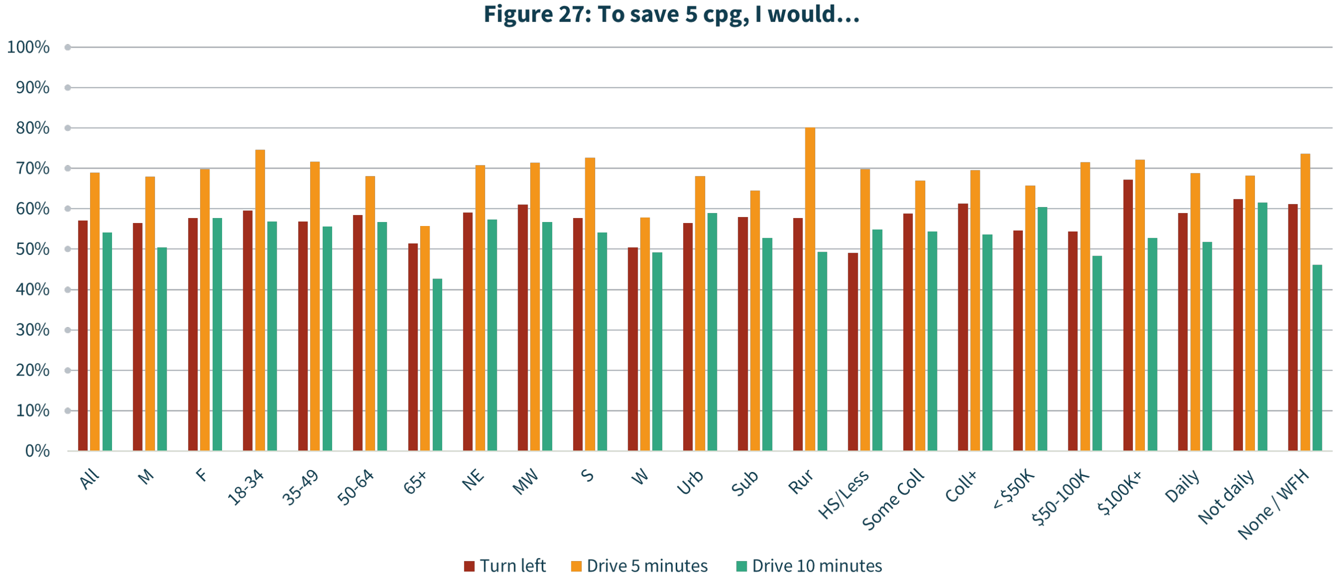


Figure 27: To save 5 cpg, I would...



Alternative Fuel – E15

In 2011, the U.S. Environmental Protection Agency issued a waiver allowing the sale of gasoline blended with up to 15% ethanol (E15) to be sold to drivers of vehicles model year 2001 or newer. Since then, more than 4,000 retail fueling locations have added E15 as an option for consumers. This survey asked consumers, “have you been presented with the option to purchase E15 (a gasoline blend containing up to 15% ethanol)?” and whether they had purchased the fuel.

According to the survey, only 27% of consumers said they had been offered E15 while 32% said they didn’t know or were not sure. Of those who had been offered E15, 42% said they decided to purchase the fuel. Nearly half (45%) of those who purchased E15 said they were influenced by a lower price, 40% said a higher octane and 45% said they thought it was better for the environment.

Figure 28: Have you had the option to purchase E15 in the past year?

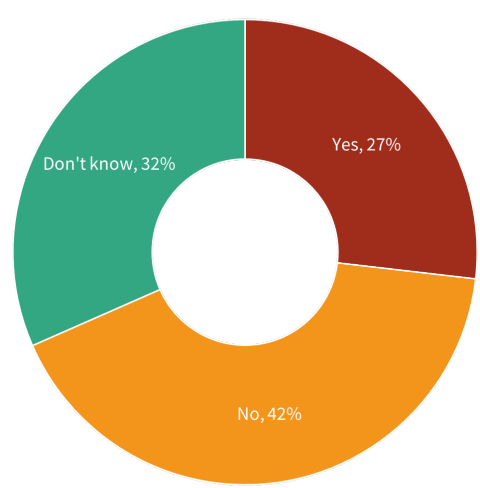


Figure 29: Those who had the option to purchase E15 in the past year

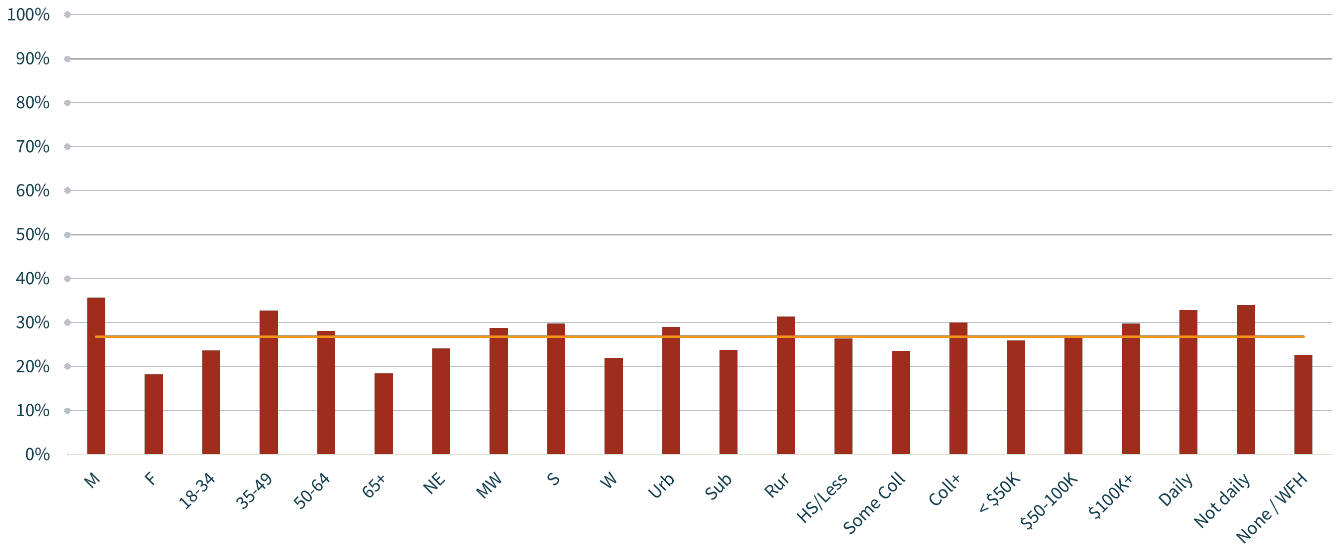


Figure 30: Of those who had the option, have you purchased E15 in the past year?

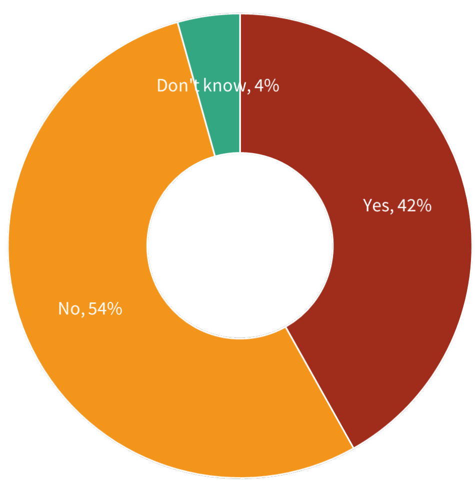


Figure 31: Of those who had the option and did purchase E15 in the past year

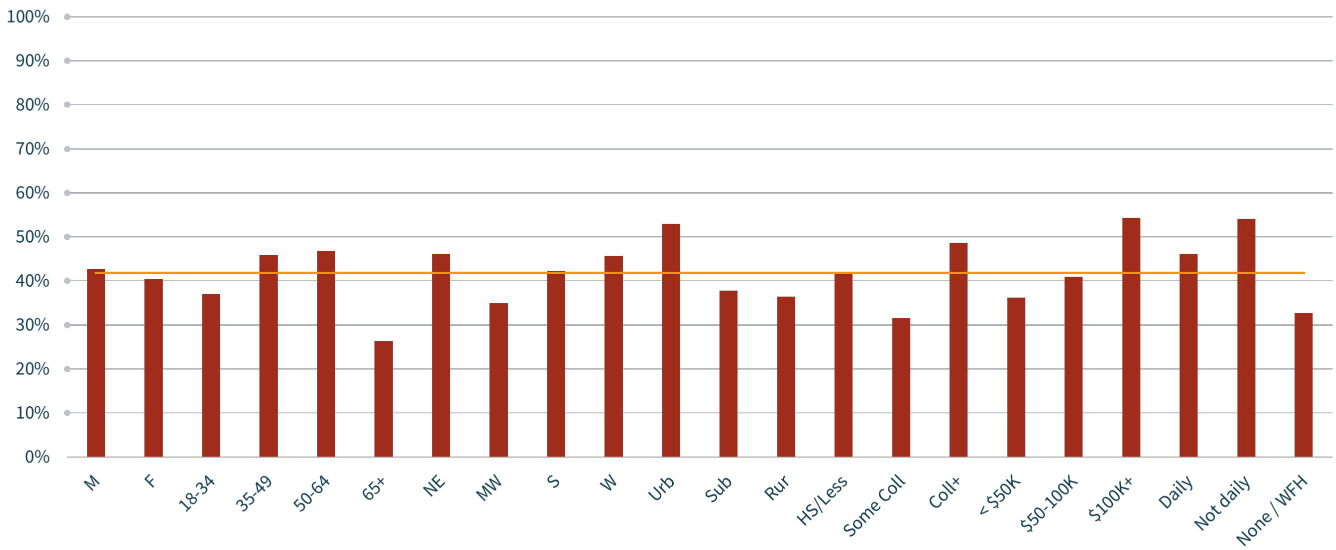
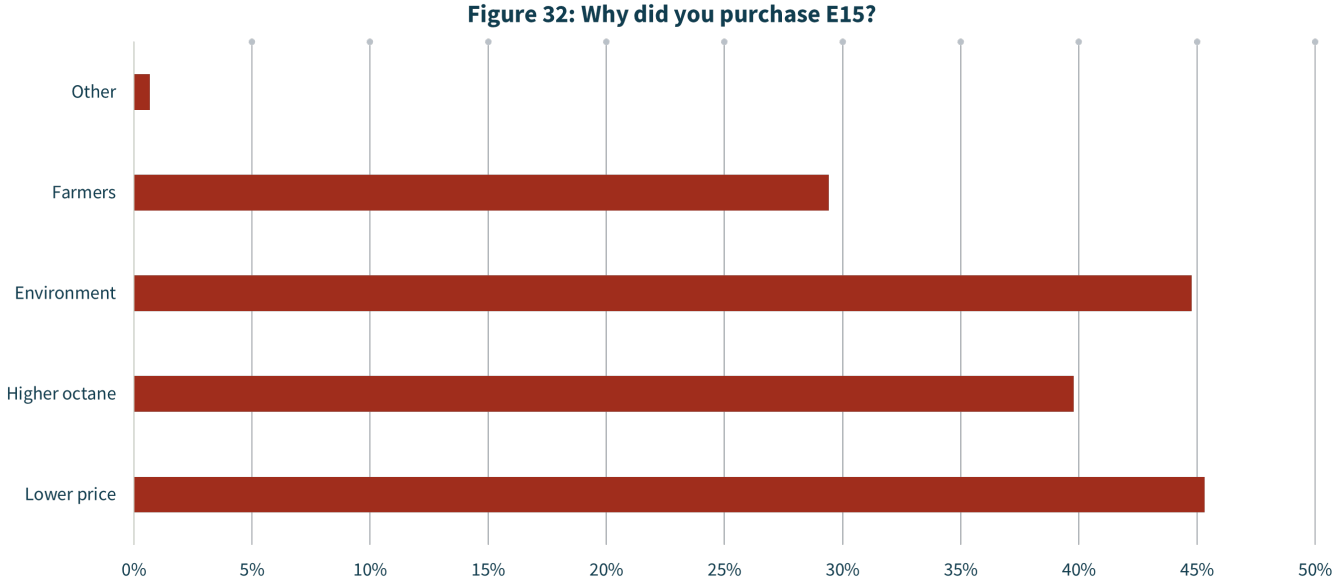


Figure 32: Why did you purchase E15?



Driving Behavior

Understanding how consumers fulfill their mobility needs, what kind of vehicles they own and drive, and how often they drive is fundamental to understanding the market. According to the survey, 83% of consumers drive at least once per week with 62% driving daily. Ten percent say they never drive, and this is slightly more prominent among 50 – 64-year-olds (15%), those residing in the Northeast (13%), those living in urban communities (15%), those with high school or less education (17%) and those making less than $50,000 per year (18%).

Figure 33: How often do you drive a vehicle?

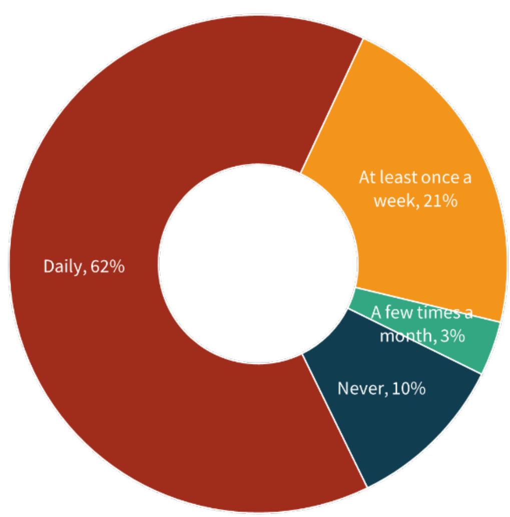


Figure 34: Drive Daily

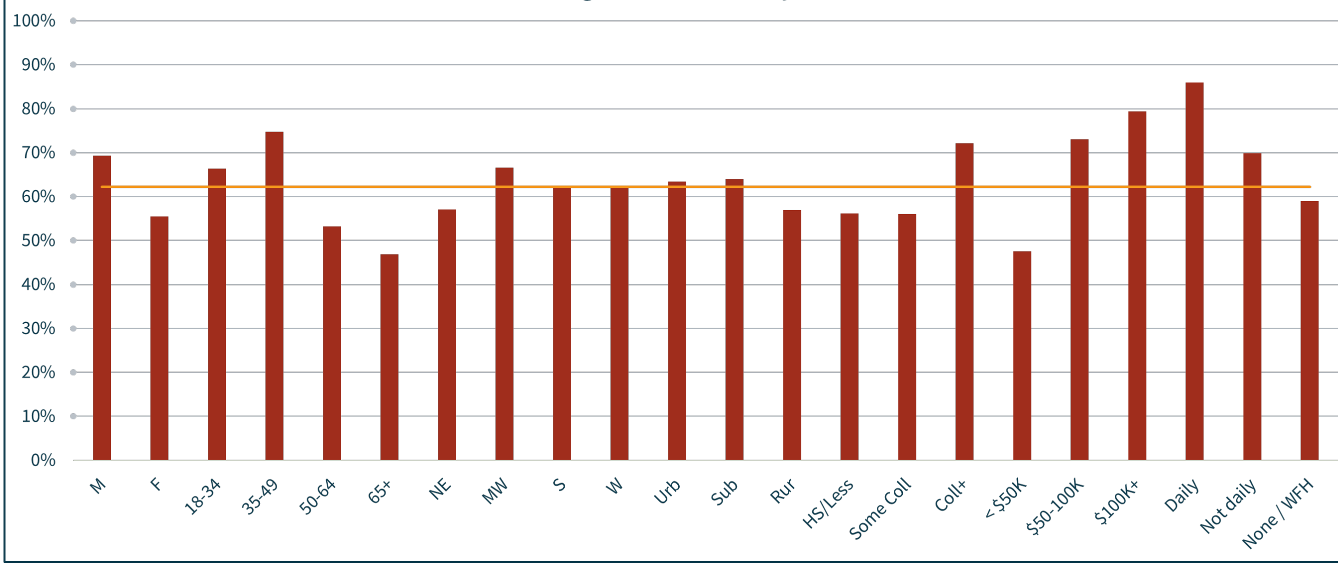


Figure 35: Drive Several Times Each Week

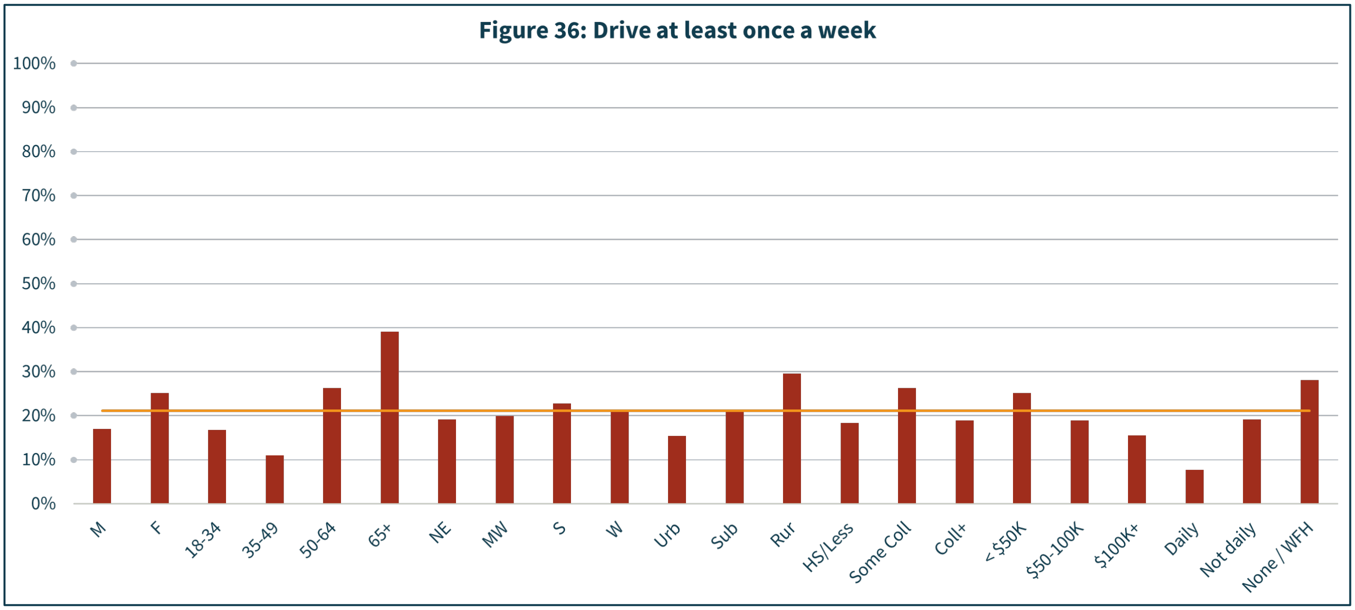


Figure 36: Drive at least once a week
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
M
F
18-34
35-49
50-64
65+
NE
MW
S
W
Urb
Sub
Rur
HS/Less
Some Coll
Coll+
< $50K
$50-100K
$100K+
Daily
Not daily
None / WFH

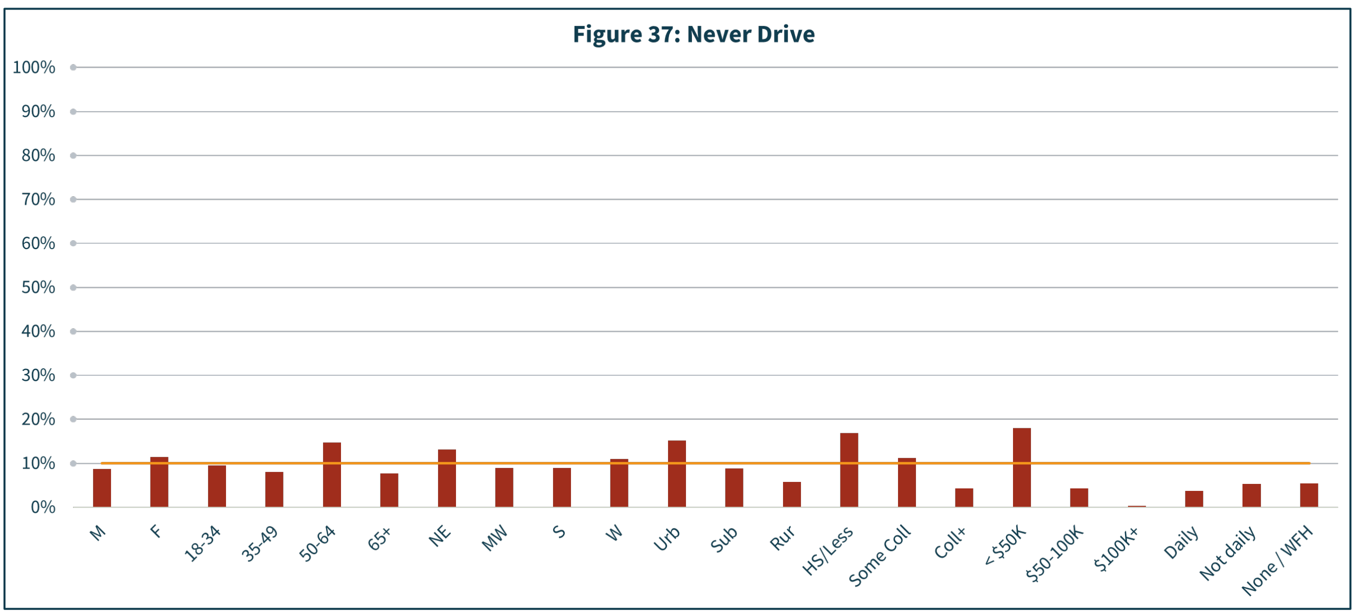


Figure 37: Never Drive
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
M
F
18-34
35-49
50-64
65+
NE
MW
S
W
Urb
Sub
Rur
HS/Less
Some Coll
Coll+
< $50K
$50-100K
$100K+
Daily
Not daily
None / WFH

Vehicle Ownership

Number of Vehicles

The majority of consumers have only one (48%) or two (28%) vehicles in their household, while 11% have zero. For households without a vehicle, those earning less than $50,000 per year led the trend at 20% followed by those with an education level of high school or less at 18%. Meanwhile, 17% of those aged 50 – 64 and 16% of those living in urban communities reported not having a vehicle. Households possessing three vehicles were led by those earning more than $100,000 per year (17%), those who don't commute or work from home (12%), those possessing a college education (11%), and those living in rural communities (11%).

Figure 38: How many vehicles do you have at home?

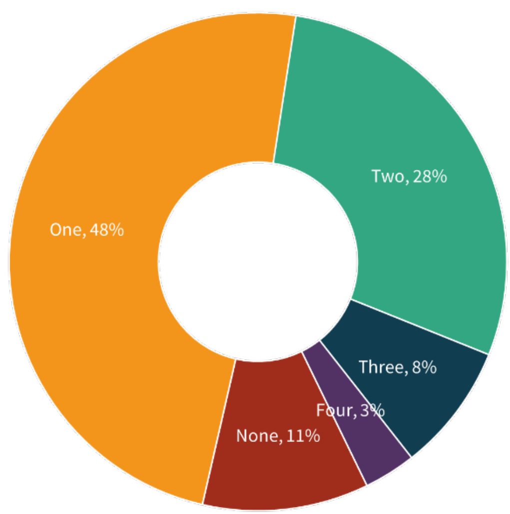


Figure 39: No Vehicles in Household

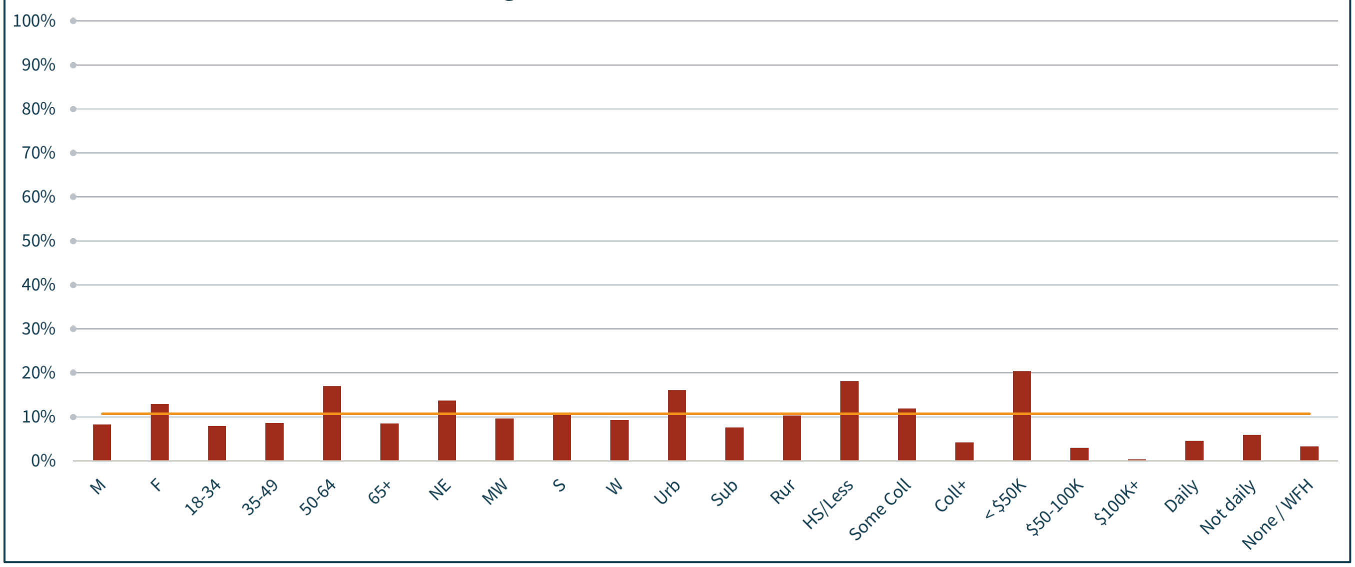


Figure 40: One Vehicle in Household

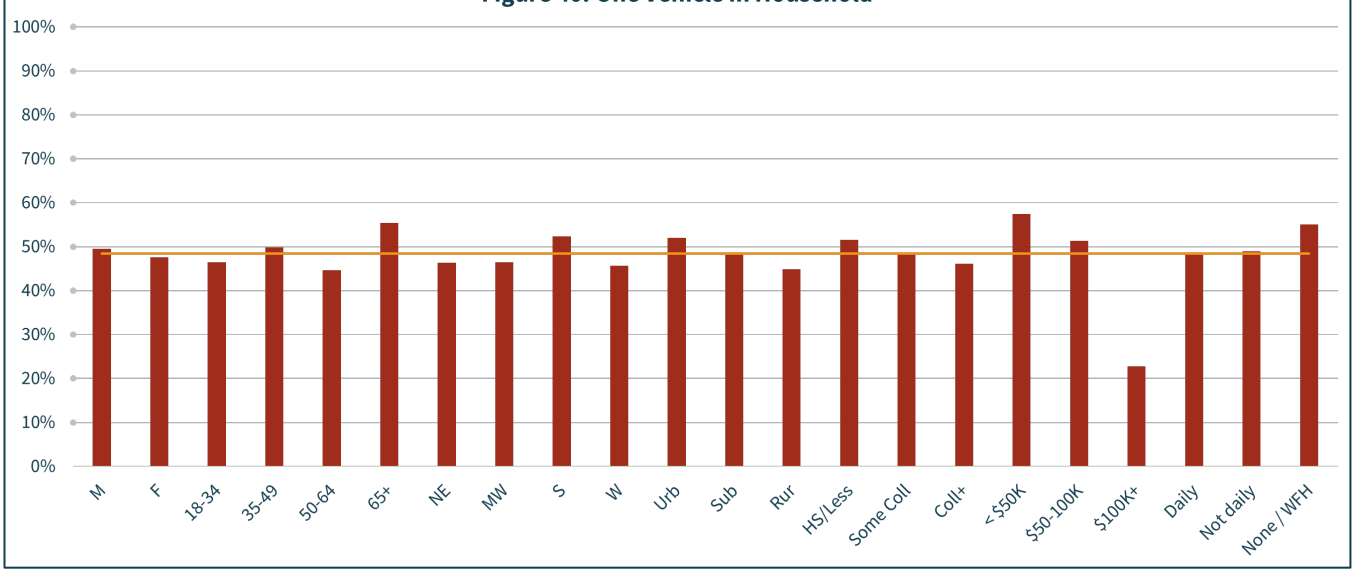


Figure 41: Two Vehicles in Household

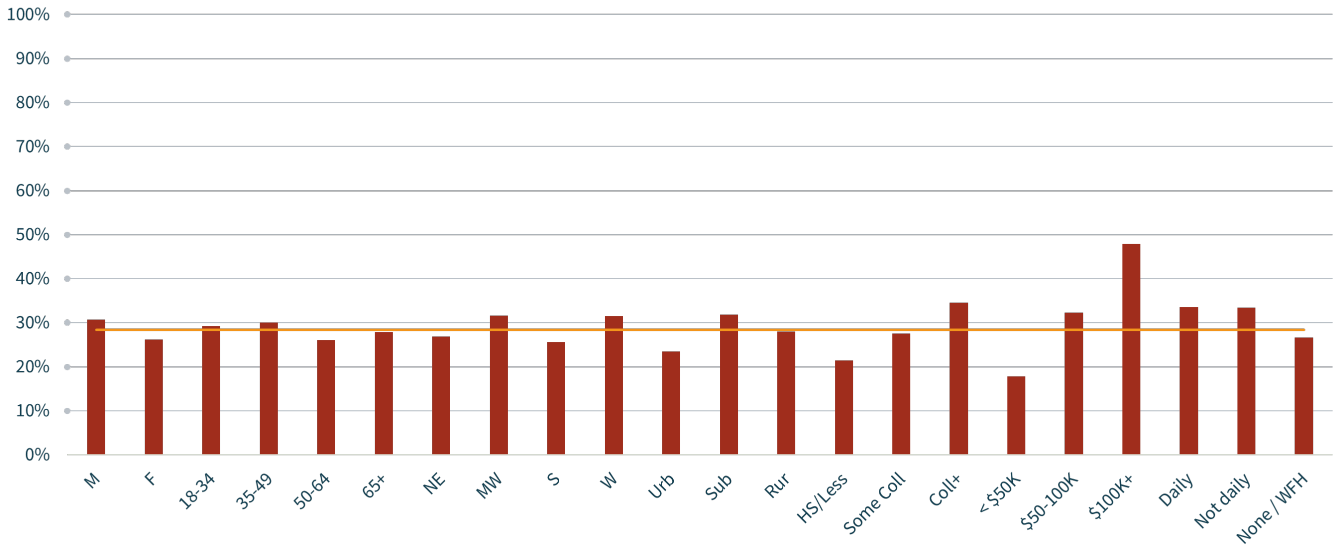
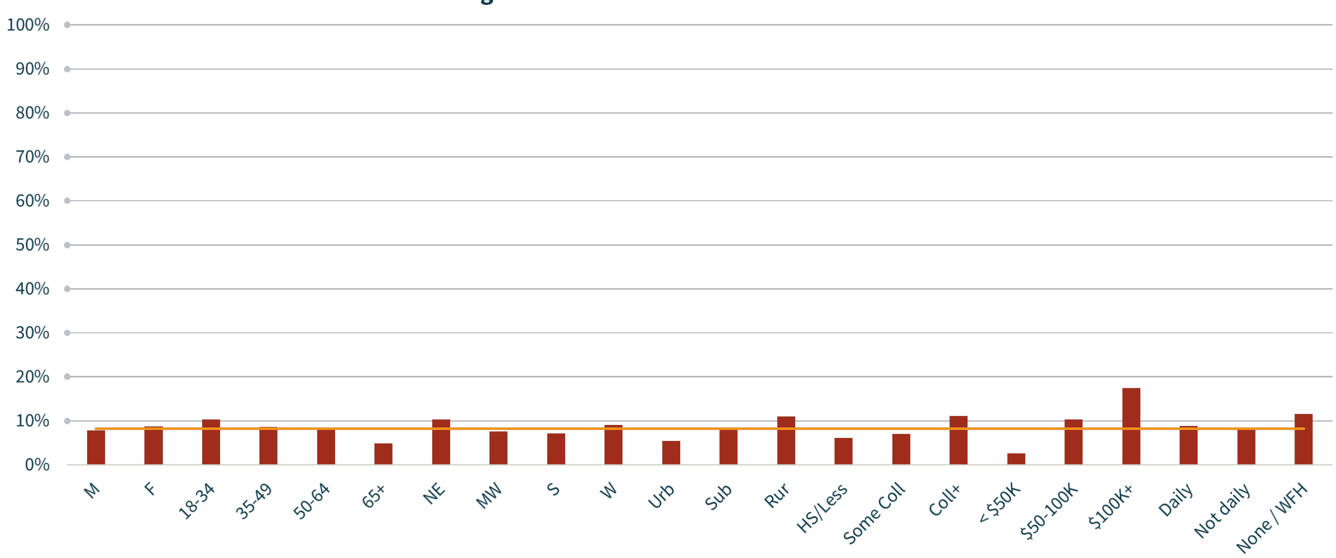


Figure 42: Three Vehicles in Household



Powertrain of Vehicles

Gasoline powered vehicles dominated the type of vehicles consumers have at home with 85% claiming to have such a vehicle, with minimal variation. Those living in urban communities had the lowest percentage of gasoline powered cars at 76% while those who do not commute or work from home topped the scale at 92%. Yet when asked which type of vehicle they most often drive, 89% said a gasoline vehicle. The only notable yet still modest exceptions were those living in the West (81%), college educated (82%) and those who do not commute or work from home (83%).

Electrified vehicles include battery electric vehicles (BEVs), plug-in hybrid electric vehicles (PHEVs), and hybrid electric vehicles (HEVs). Combined, these vehicles were owned by 16% of households.

HEVs, which are equipped with an ICE and a battery system that is not charged from an electrical outlet, were owned by 8% of households. For households with HEVs, there were many demographic groups that exceeded the average, including 18 - 34-year-olds (13%), those living in the West (12%), college educated (13%), those earning more than $100,000 per year (15%) and those who do not commute daily (12%). Several groups also fell significantly below the average, including those 50 – 64 years old (5%), those living in the Midwest (3%) and those living in rural communities (3%). Overall, 5% of consumers said they drove a HEV most often. This average was exceeded by those in the West (9%) and those with a college education (8%). Those in the Midwest (1%), in rural communities (2%) and those with a high school or less education (2%) fell below the average.

PHEVs, which can be charged from an electrical outlet and operate on electricity for a limited range before the vehicle's ICE takes over, were owned by only 2% of households. One notable exception was found among those earning more than $100,000 per year, 5% of whom reported owning a PHEV. Consistent with ownership levels, only 1% of consumers reported they drive a PHEV most often. This was exceeded by those with a college education (3%) and those who said they did not commute daily (3%).

BEVs, which have been the subject of several policy programs at the state and federal levels and operate exclusively on power received by charging from an electrical outlet, were owned by 6% of households. BEV ownership was lower among those over 65 years of age (1%), those living in rural communities (2%), and those earning less than $50,000 (2%). Meanwhile, 10% of those living in the West reported owning a BEV, as did 10% of those with college educations, 15% of those earning more than $100,000 and 12% of those who do not commute daily. Four percent of consumers reported driving a BEV most often. Consumers in the West (8%), earning more than $100,000 (10%) and those who do not commute daily (9%) exceeded the average. Falling below the average were those 65 years of age and older (0%), those in the Midwest (1%) and rural communities (1%), those with a high school or less education (0%), and those earning less than $50,000 (1%).

Diesel powered vehicles were owned by 4% of households. More than 8% of those 18 - 34 said they own a diesel vehicle, followed by nearly 8% of those earning $100,000 and 7% of those who do not commute or work from home. Those 50 - 64 years of age, those possessing a high school education or less, and those earning less than $50,000 all came in under 2%. One percent of consumers reported driving a diesel vehicle most often, with 18 - 34-year-olds exceeding this rate at 3%.

Figure 43: Do you have any of these vehicles at home?

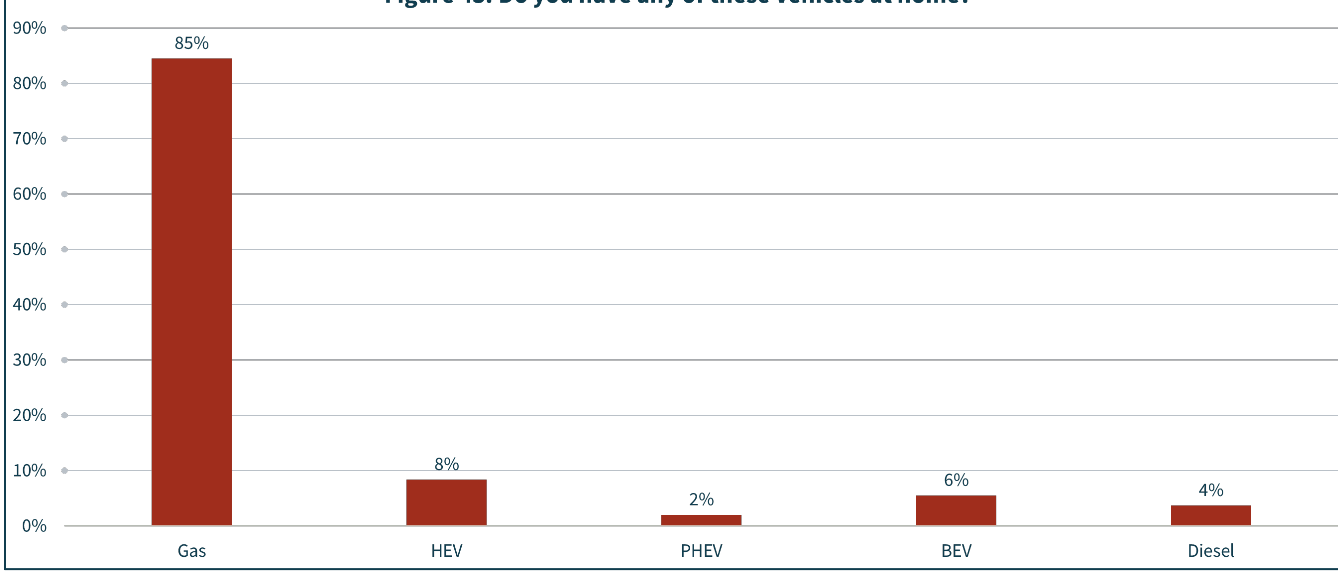


Figure 44: Have a Gasoline Vehicle in Household

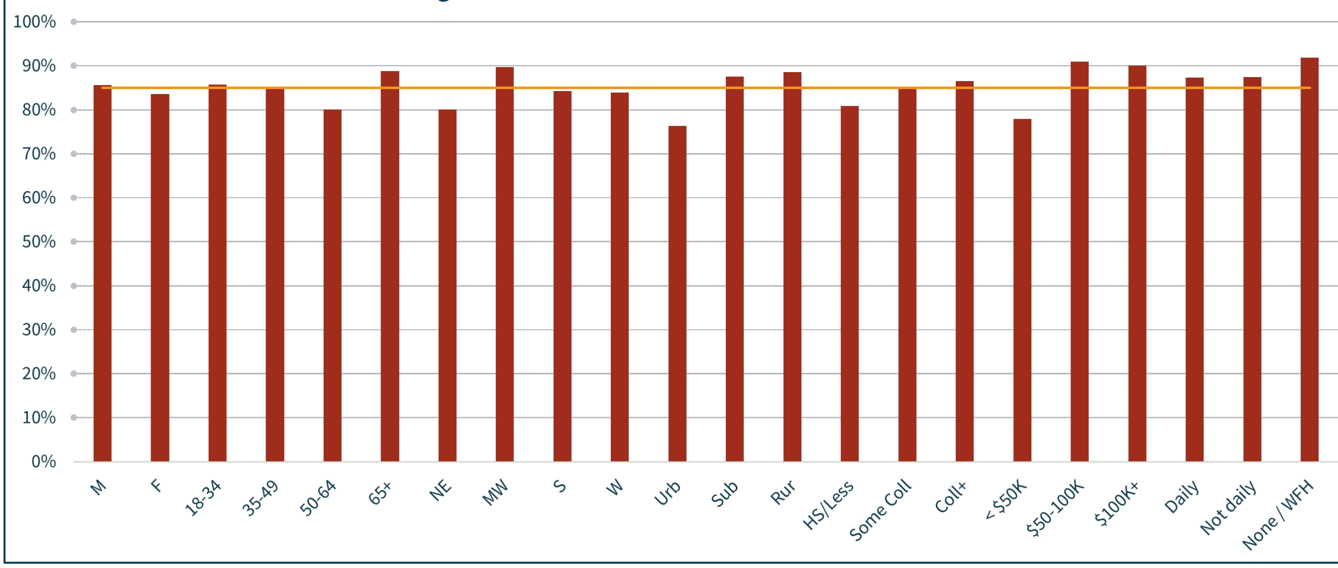
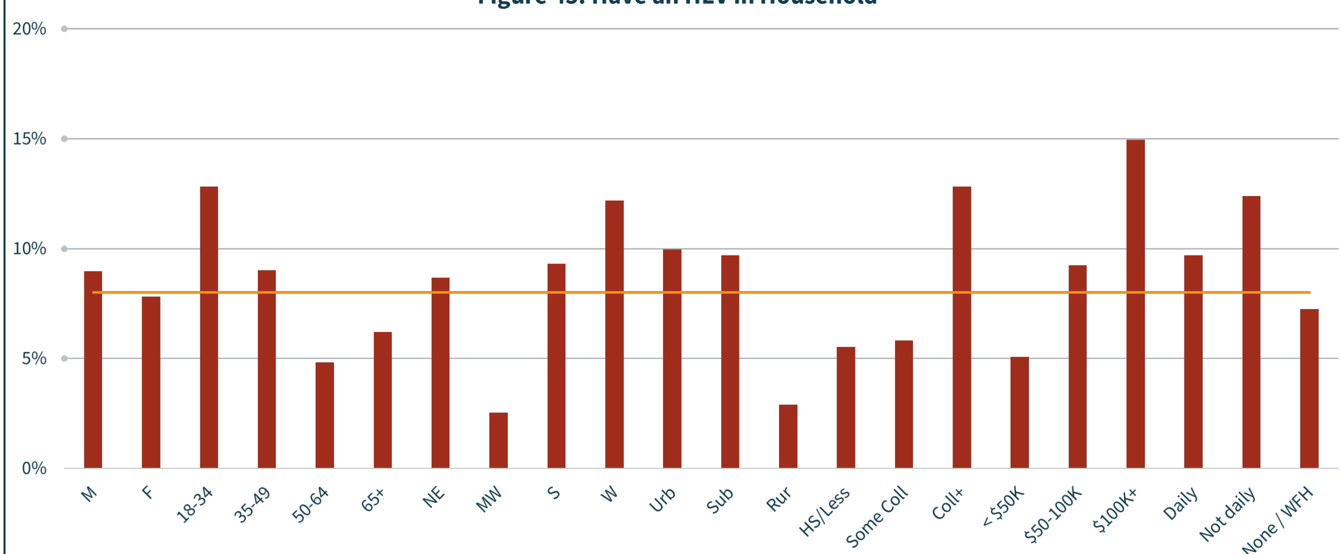


Figure 45: Have an HEV in Household



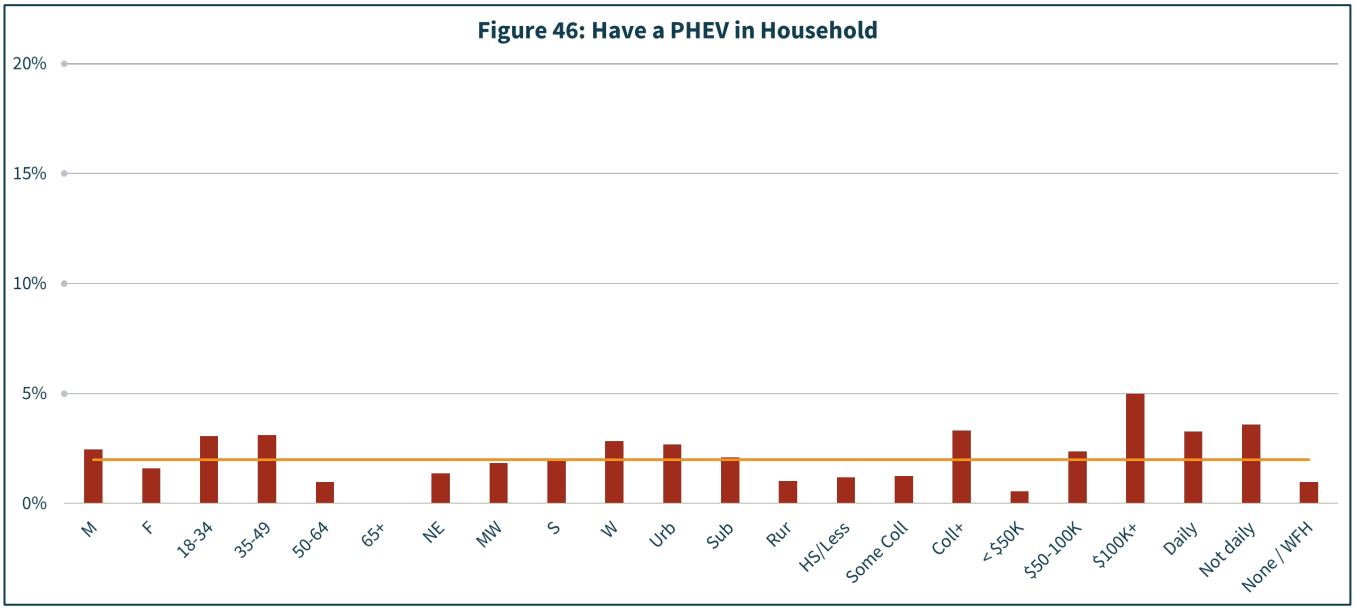


Figure 46: Have a PHEV in Household
20%
15%
10%
5%
0%
M
F
18-34
35-49
50-64
65+
NE
MW
S
W
Urb
Sub
Rur
HS/Less
Some Coll
Coll+
< $50K
$50-100K
$100K+
Daily
Not daily
None / WFH

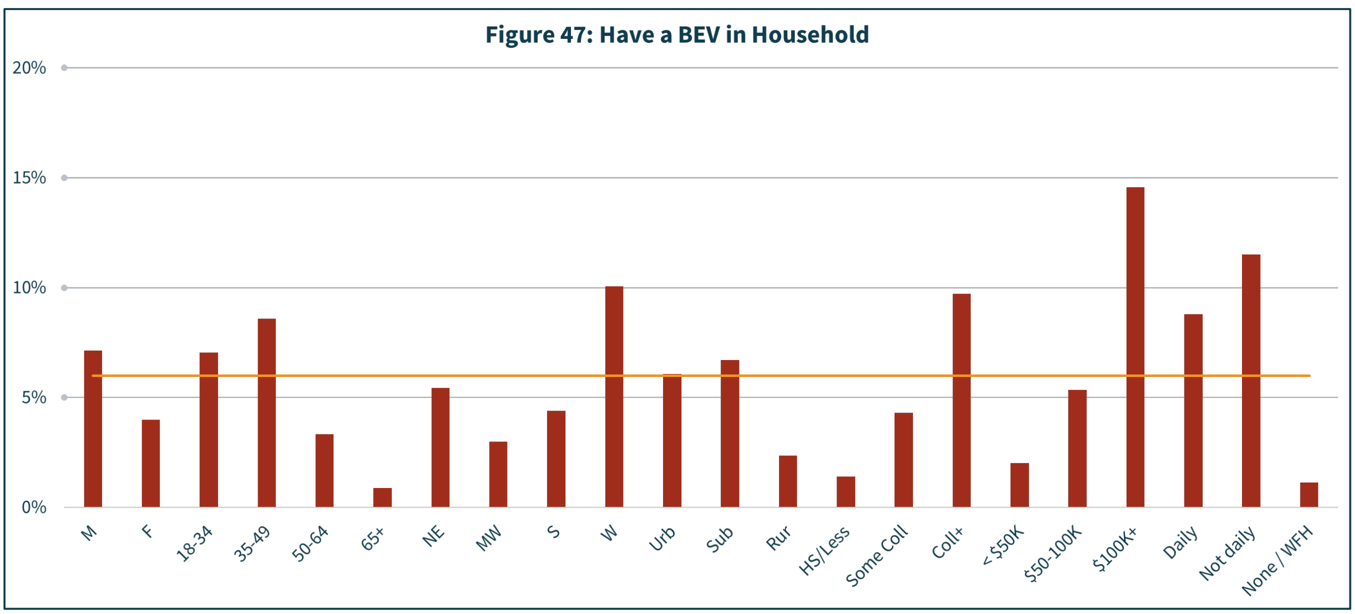


Figure 47: Have a BEV in Household
20%
15%
10%
5%
0%
M
F
18-34
35-49
50-64
65+
NE
MW
S
W
Urb
Sub
Rur
HS/Less
Some Coll
Coll+
< $50K
$50-100K
$100K+
Daily
Not daily
None / WFH

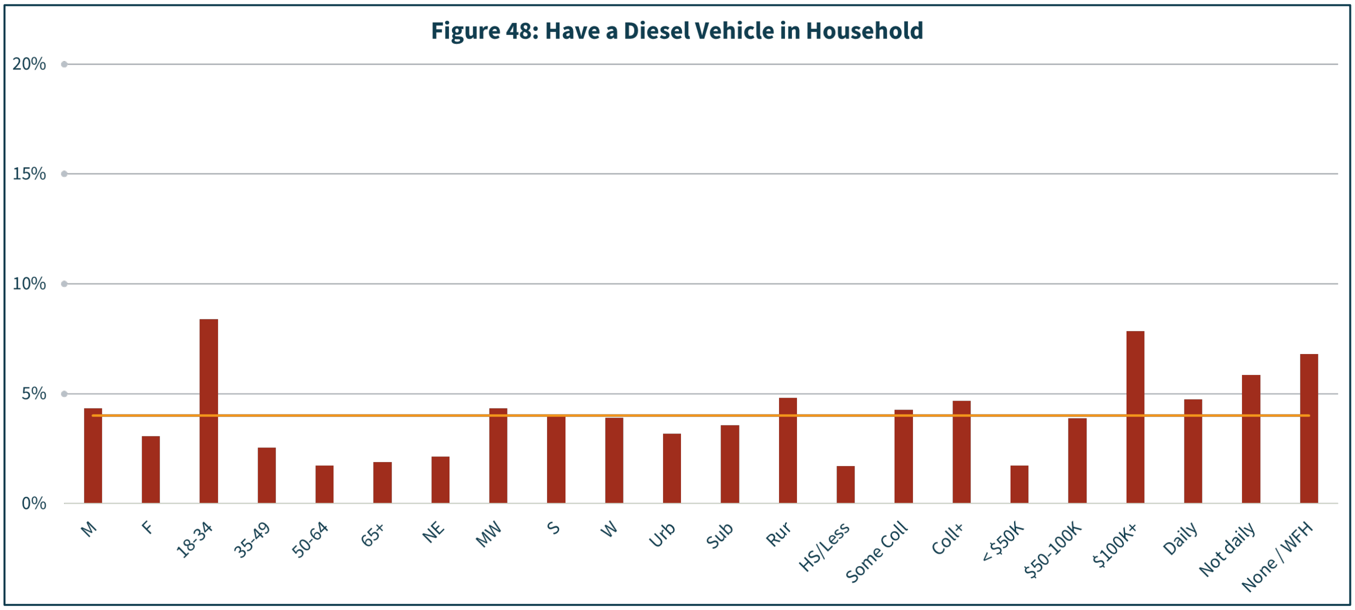


Figure 48: Have a Diesel Vehicle in Household
20%
15%
10%
5%
0%
M
F
18-34
35-49
50-64
65+
NE
MW
S
W
Urb
Sub
Rur
HS/Less
Some Coll
Coll+
< $50K
$50-100K
$100K+
Daily
Not daily
None / WFH

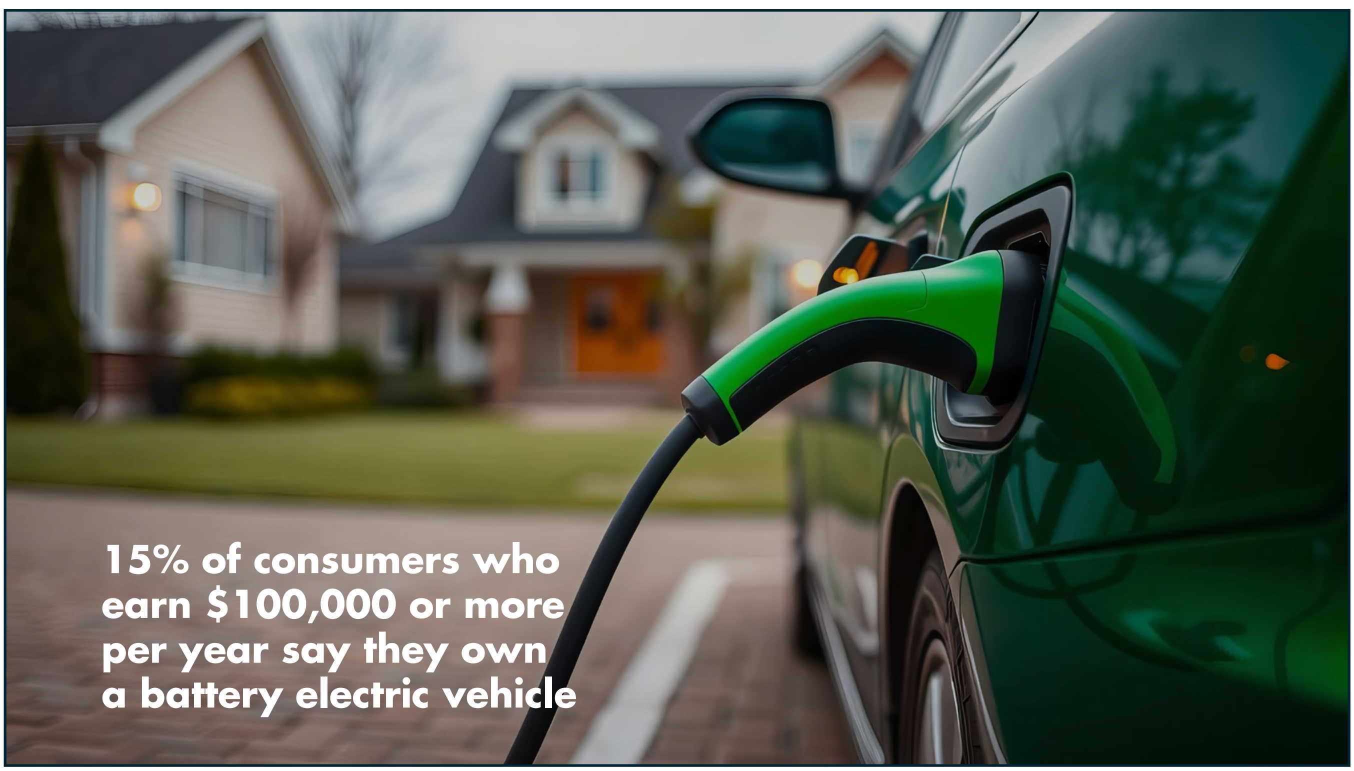

15% of consumers who earn $100,000 or more per year say they own a battery electric vehicle

Figure 49: Why type of vehicle do you most commonly drive?

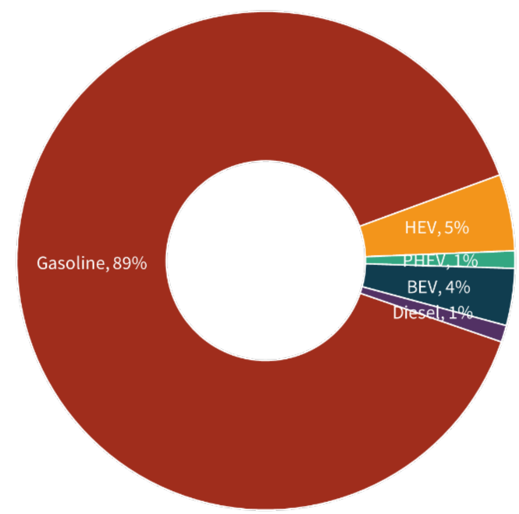
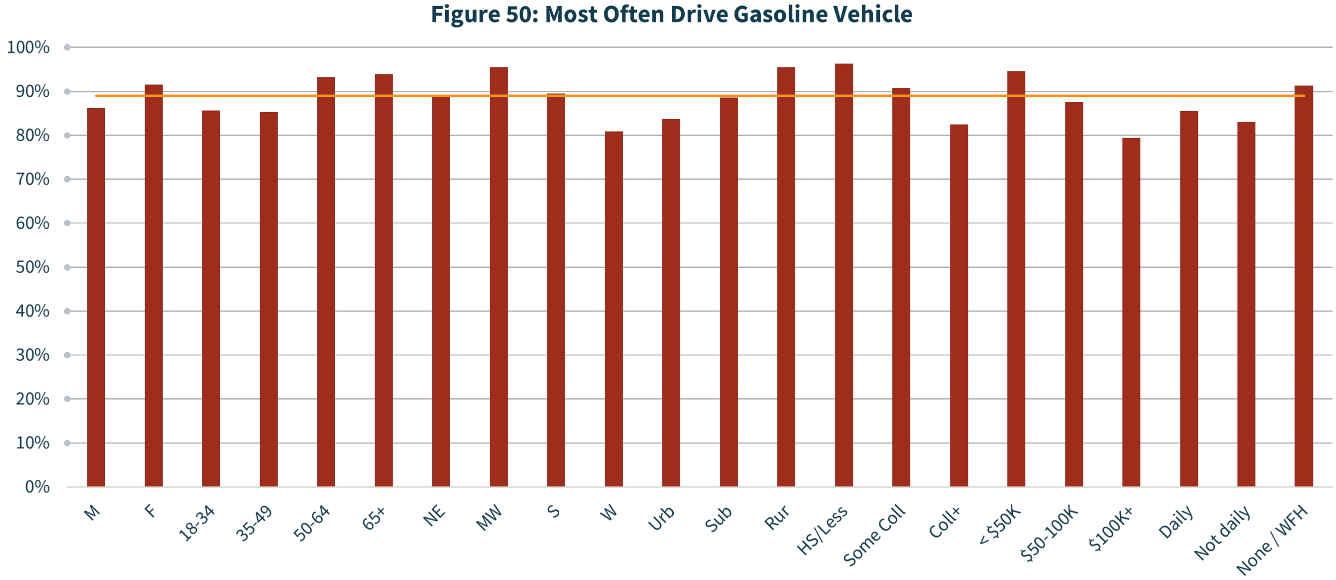


Figure 50: Most Often Drive Gasoline Vehicle



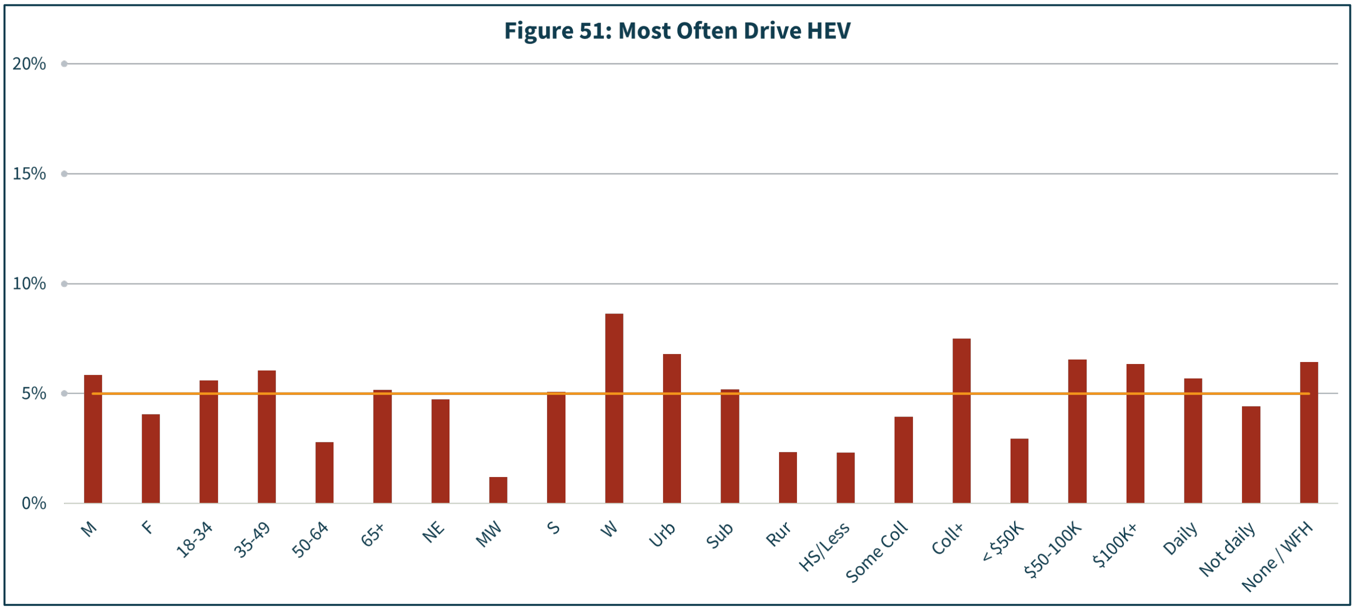


Figure 51: Most Often Drive HEV
20%
15%
10%
5%
0%
M
F
18-34
35-49
50-64
65+
NE
MW
S
W
Urb
Sub
Rur
HS/Less
Some Coll
Coll+
< $50K
$50-100K
$100K+
Daily
Not daily
None / WFH

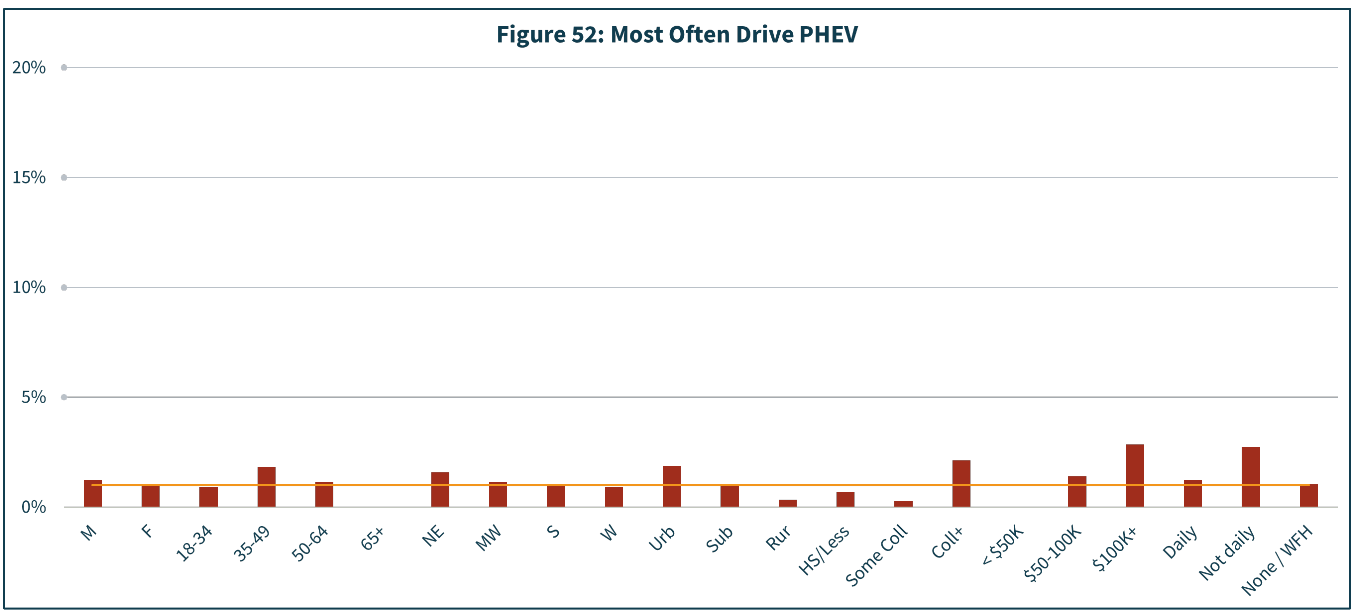


Figure 52: Most Often Drive PHEV
20%
15%
10%
5%
0%
M
F
18-34
35-49
50-64
65+
NE
MW
S
W
Urb
Sub
Rur
HS/Less
Some Coll
Coll+
< $50K
$50-100K
$100K+
Daily
Not daily
None / WFH

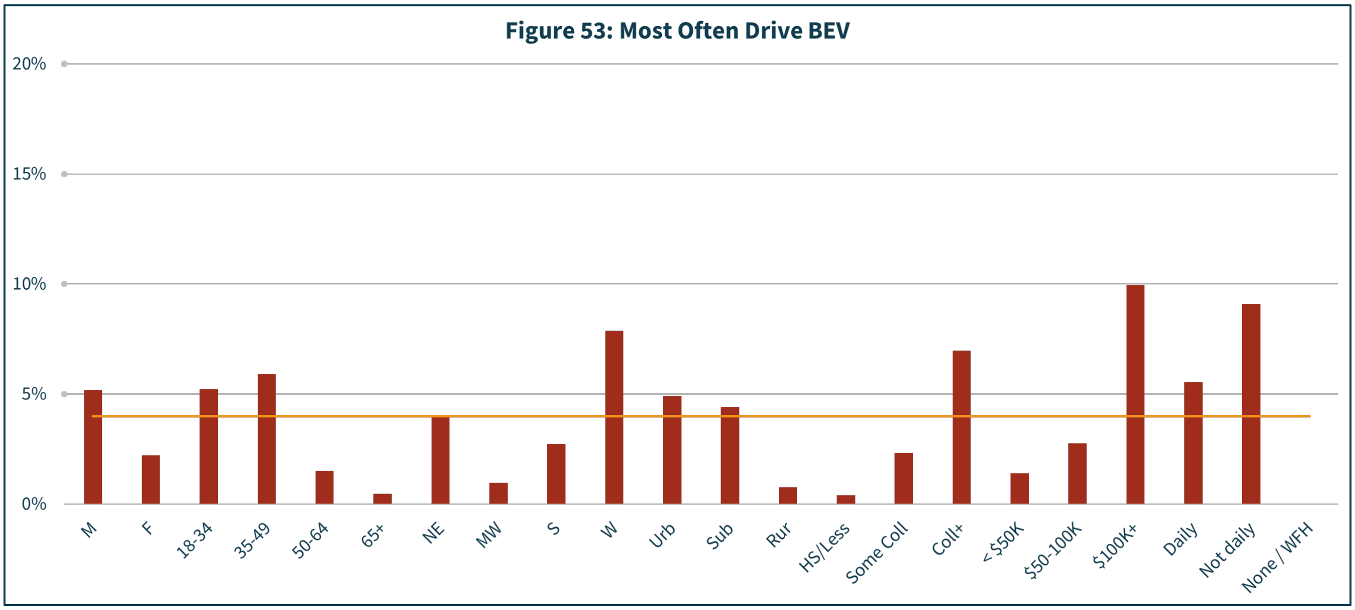


Figure 53: Most Often Drive BEV
20%
15%
10%
5%
0%
M
F
18-34
35-49
50-64
65+
NE
MW
S
W
Urb
Sub
Rur
HS/Less
Some Coll
Coll+
< $50K
$50-100K
$100K+
Daily
Not daily
None / WFH

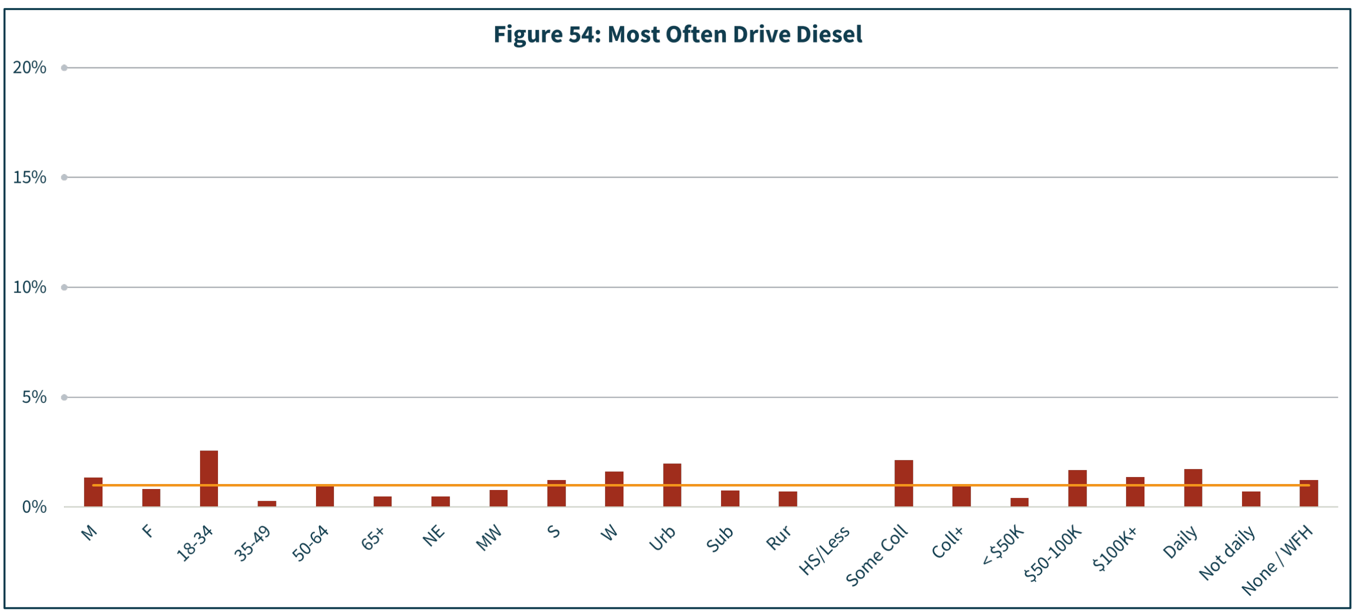


Figure 54: Most Often Drive Diesel
20%
15%
10%
5%
0%
M
F
18-34
35-49
50-64
65+
NE
MW
S
W
Urb
Sub
Rur
HS/Less
Some Coll
Coll+
< $50K
$50-100K
$100K+
Daily
Not daily
None / WFH

Type of Vehicle

The majority of consumers reported they most commonly drive a car (55%), while 32% said they drive a sport utility vehicle (SUV) or crossover utility vehicle (CUV), 9% drive a pickup truck and 3% drive a van or minivan. Those 18 - 34 years old (70%) exceeded the average of those who most commonly drive a car, while those earning $100,000 per year (40%) were least likely to most commonly drive a car.

Men were more likely to drive pickup trucks than women (15% to 3%), and those in the West (13%) and Rural communities (15%) also exceeded the average. In addition to women, those living in the Northeast (5%) and those earning less than $50,000 (6%) also deviated from the average pickup truck driver.

Women were more likely than men to drive a SUV/CUV (36% to 28%), while those over 65 years of age (40%), those with a college education (41%), those earning $100,000 (50%) and those who do not commute or work from home (40%) exceeded the average. Those 18 - 34 years of age (21%) fell significantly lower than the SUV/CUV average.

Figure 55: What kind of vehicle do you most commonly drive?

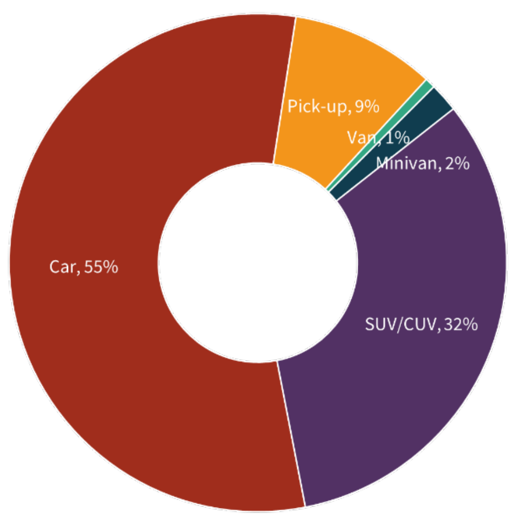


Figure 56: Most Often Drive a Car

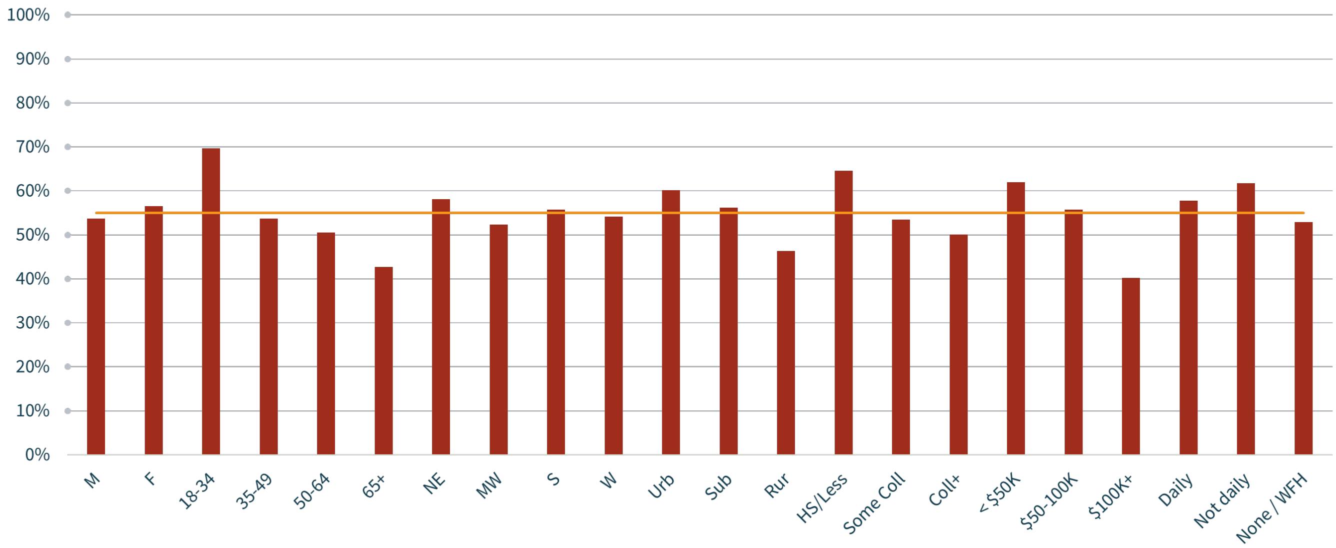


Figure 57: Most Often Drive a SUV or CUV

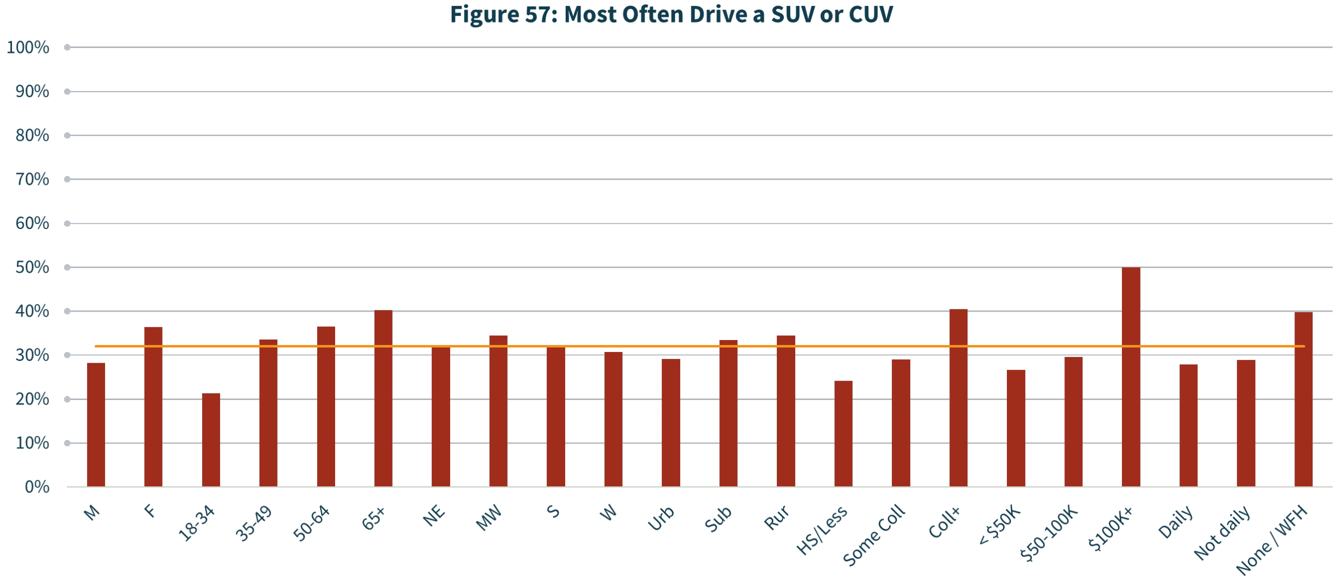


Figure 58: Most Often Drive a Pick-up

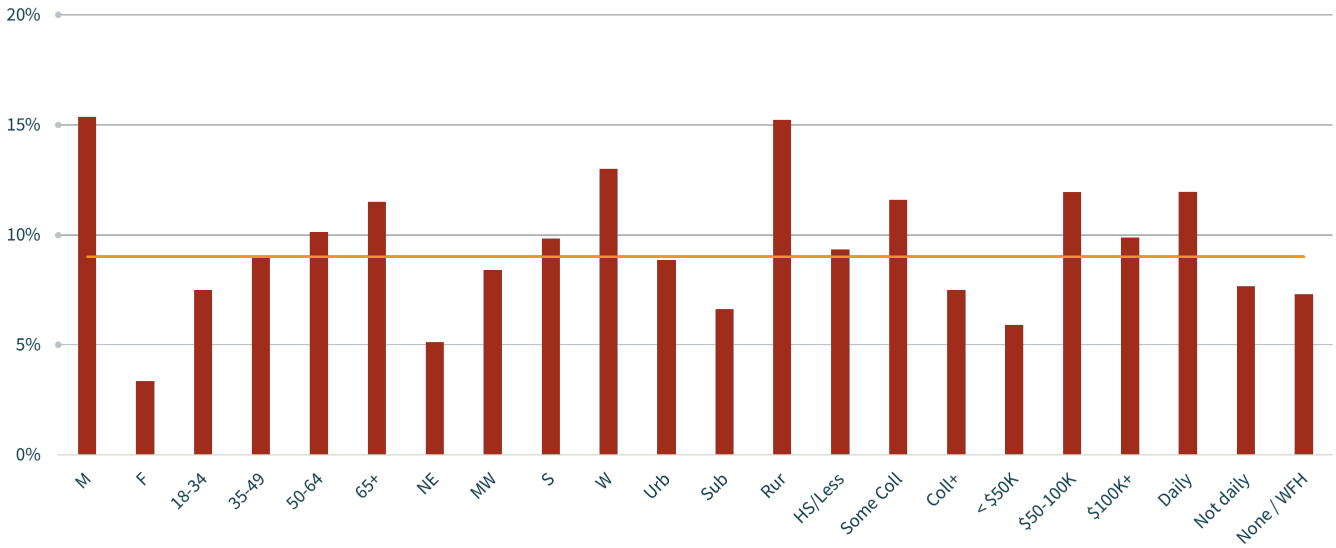
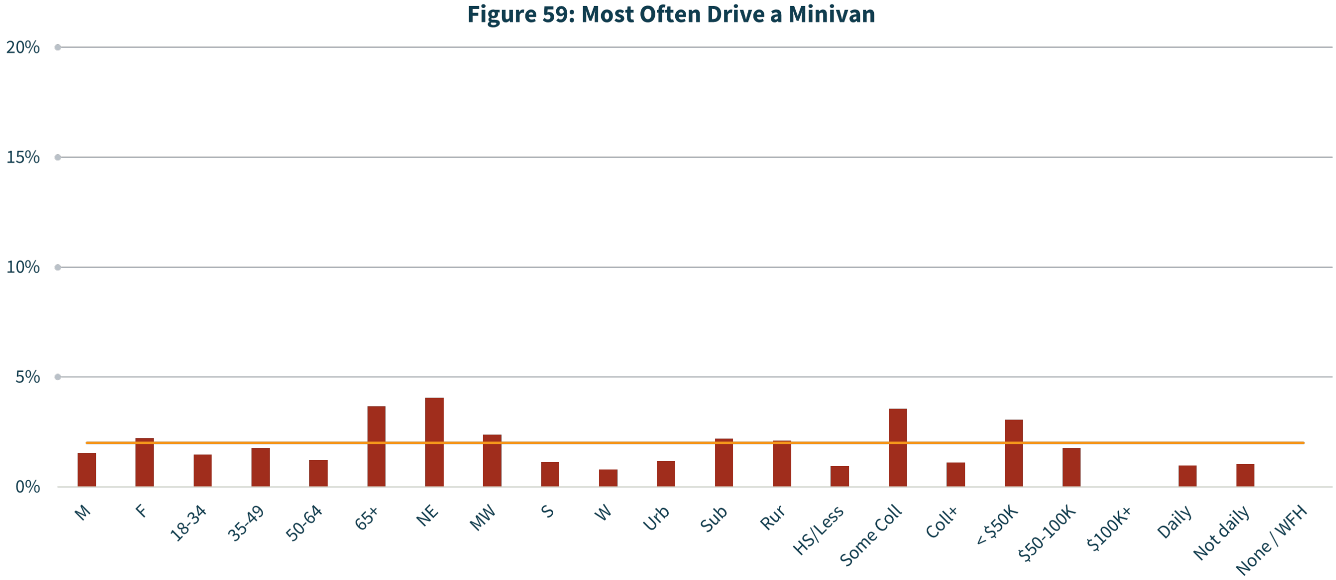


Figure 59: Most Often Drive a Minivan



Future Vehicle Acquisition

Likely to Buy or Lease in Two Years

With 57% of consumers having a pessimistic feeling about the economy, it is not surprising that 50% of consumers think that now is a bad time to buy or lease a vehicle. Of those thinking now is a good time to buy a vehicle (23%), there was only one significant variation - 34% of those earning $100,000 per year think now is a good time to buy or lease a vehicle.

At the same time, 64% of consumers think prices will increase next year, while only 12% expect them to go down. Complementing their higher-than-average perception that now is a good time to buy or lease a vehicle, 75% of those earning $100,000 think prices will be higher next year.

With that in mind, it is not surprising that only 39% of consumers think they are likely to buy or lease a vehicle in the next two years, while 41% believe they are unlikely to make such a purchase. Those 65 years of age or older are the least likely to make a purchase (18%) while those earning $100,000 are the most likely (56%). The overall sentiment has not changed much compared to last year's survey respondents, 40% of whom said they are likely to buy or lease a vehicle in the next two years and 38% said they were unlikely to do so.

Figure 60: Is Now a Good Time to Buy/Lease a Vehicle?

Figure 61: Is Now a Good Time to Buy/Lease a Vehicle?

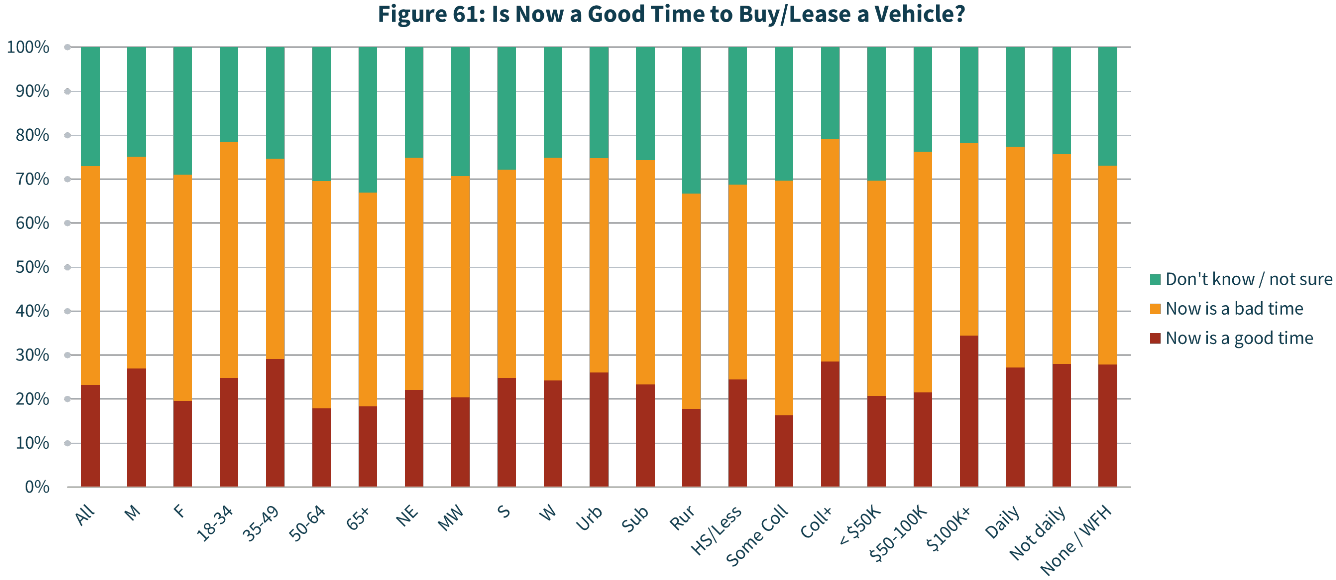


Figure 62: Will Vehicle Prices Go Up in the Next Year?

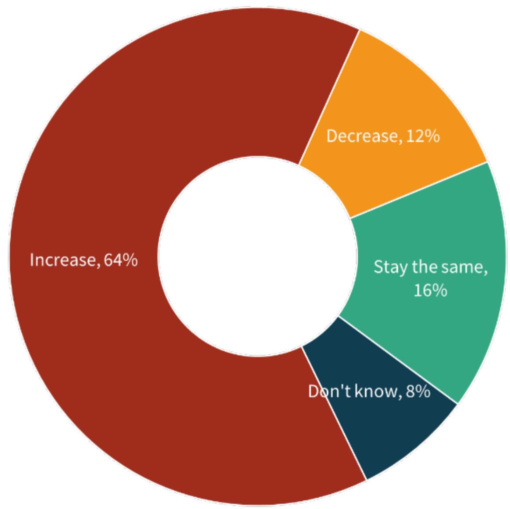


Figure 63: Will Vehicle Prices go Up in the Next Year?

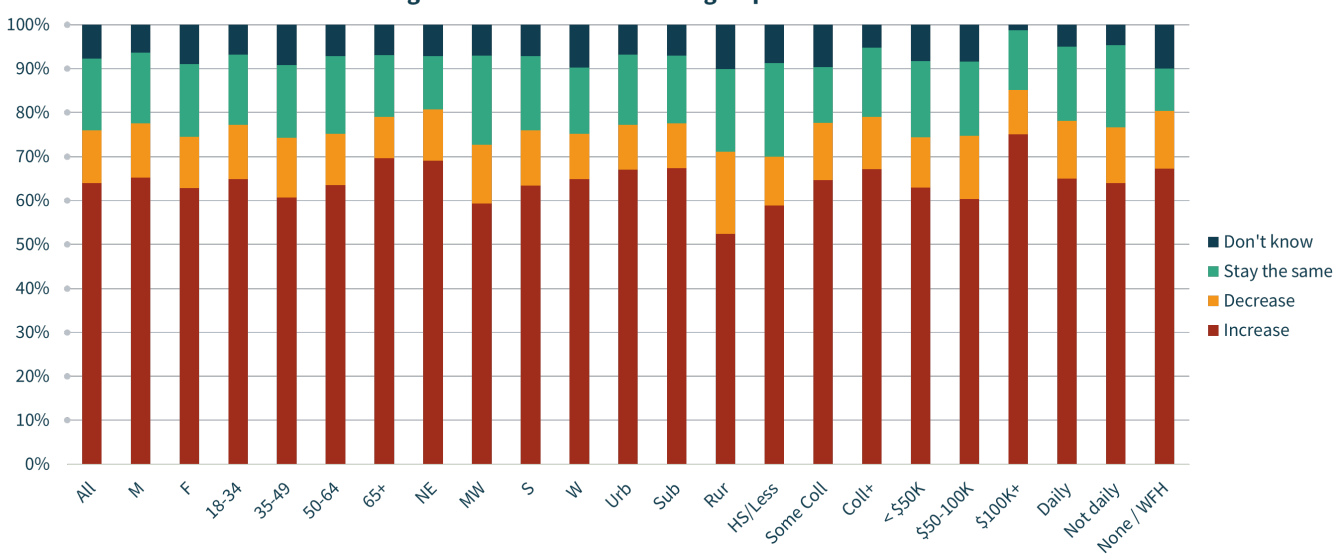


Figure 64: How likely are you to buy/lease a vehicle in the next two years?

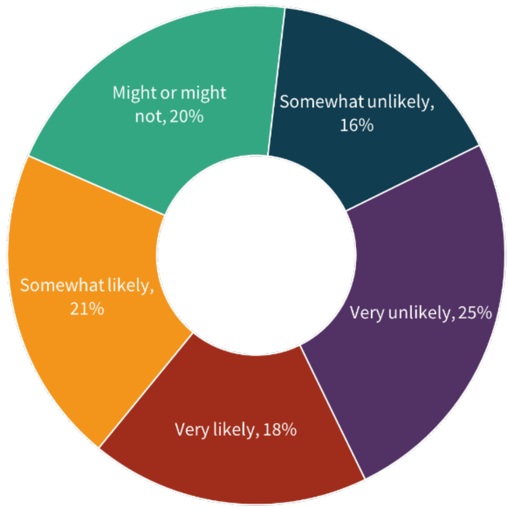
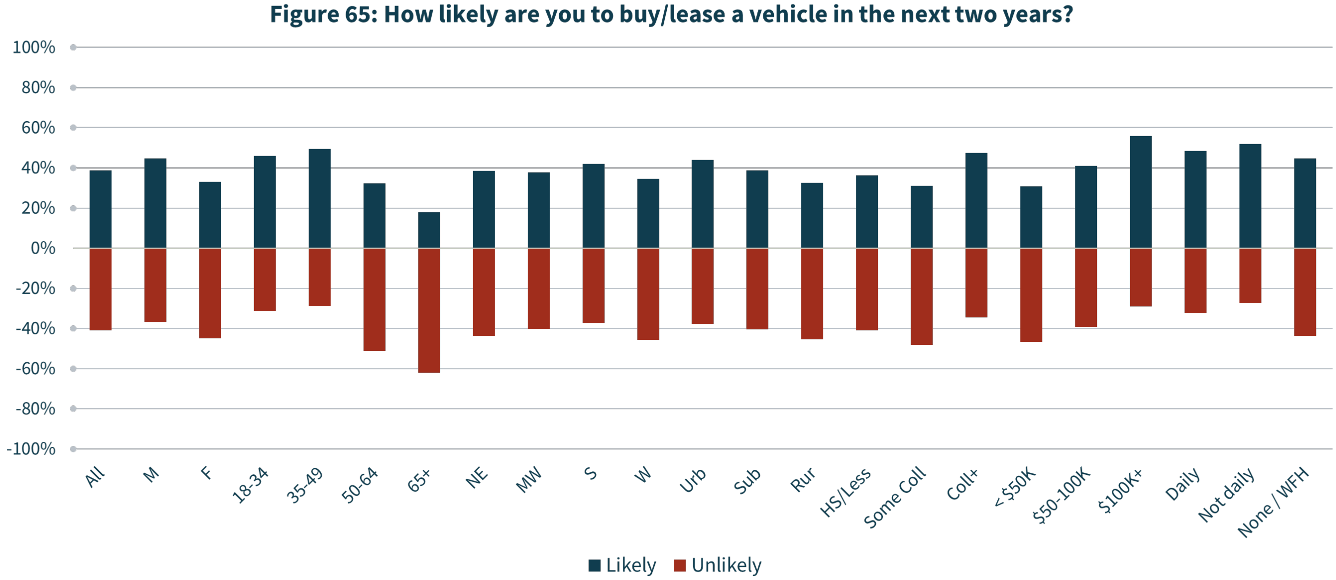


Figure 65: How likely are you to buy/lease a vehicle in the next two years?



Consideration of Powertrains

Of those who say they are likely to or might buy a vehicle in the next two years, 82% said they are likely to consider a gasoline powered vehicle and 6% said they were unlikely[4]. Those who live in the West (74%) and those who do not commute daily (72%) were the only significant deviations from the average.

Flexible fuel vehicles (FFVs), those capable of operating on gasoline blended with up to 85% ethanol, would likely be considered by 26% of consumers while 43% would not consider these vehicles. Men (34%), those in the Northeast (31%), those living in urban communities (35%), those earning $100,000 (34%) and those who commute daily (38%) and not daily (33%) exceeded the average of those likely to consider an FFV. Meanwhile, those over 65 years of age (10%), those in rural communities (18%) and those with some college education (15%) were less likely than the average to consider an FFV.

While two-thirds of potential vehicle buyers were unlikely to consider purchasing a diesel vehicle, 17% said they were likely to consider one. Men (25%), those earning $100,000 (26%) and those who commute daily (25%) were more likely than the average to consider a diesel vehicle, while women (9%) and those 65 years of age and older (2%) were least likely.

Thirty-seven percent of consumers were likely to consider a HEV, while 41% said they were unlikely to consider one. Men (45%), those 18 - 34 years old (45%), those in the West (45%), those in urban communities (47%), those with college educations (48%), those earning $100,000 (56%) and those who do not commute daily (49%) exceeded the average, while those in rural communities (20%) and those 65 years of age or older (25%) were least likely to consider acquiring an HEV.

More than one-quarter (28%) of consumers were likely to consider a PHEV, although 53% were unlikely to consider one. Those who live in the West (40%), those with college educations (38%), those earning $100,000 (46%) or those commuting daily (37%) or not daily (38%) exceeded the average. Those 65 years of age or older (10%) and those living in rural communities (13%) were least likely to consider a PHEV.

More than one-quarter (28%) of consumers were likely to consider purchasing a BEV, with 56% saying they were unlikely to consider one. Men (36%), those living in the West (38%), those in urban communities (36%), those with college educations (37%), those earning $100,000 (44%) and those who commute (37% and 39% daily and not daily, respectively) exceeded the average. Meanwhile, those 65 years of age or older (11%) and those in rural communities (12%) were the least likely to consider a BEV.

[4] During peer review, this data point was contrasted with the results of a different survey, Deloitte's Global Automotive Consumer Study, which found 62% of U.S. consumers would "prefer a gasoline/diesel ICE" for their next vehicle. It is important to note that responses to surveys are contingent upon how questions were asked and of whom. The survey included in this TEI paper asked its respondents, "How likely are you to consider a gasoline powered vehicle?"

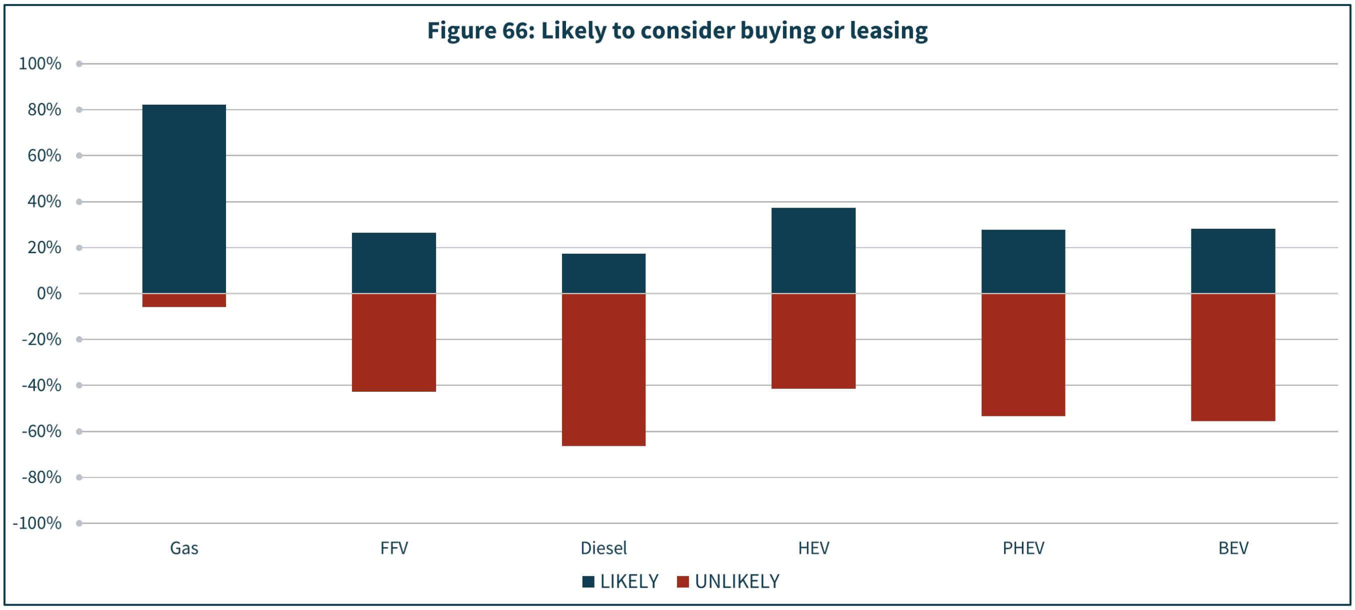


Figure 66: Likely to consider buying or leasing
100%
80%
60%
40%
20%
0%
-20%
-40%
-60%
-80%
-100%
Gas
FFV
Diesel
HEV
PHEV
BEV
LIKELY
UNLIKELY

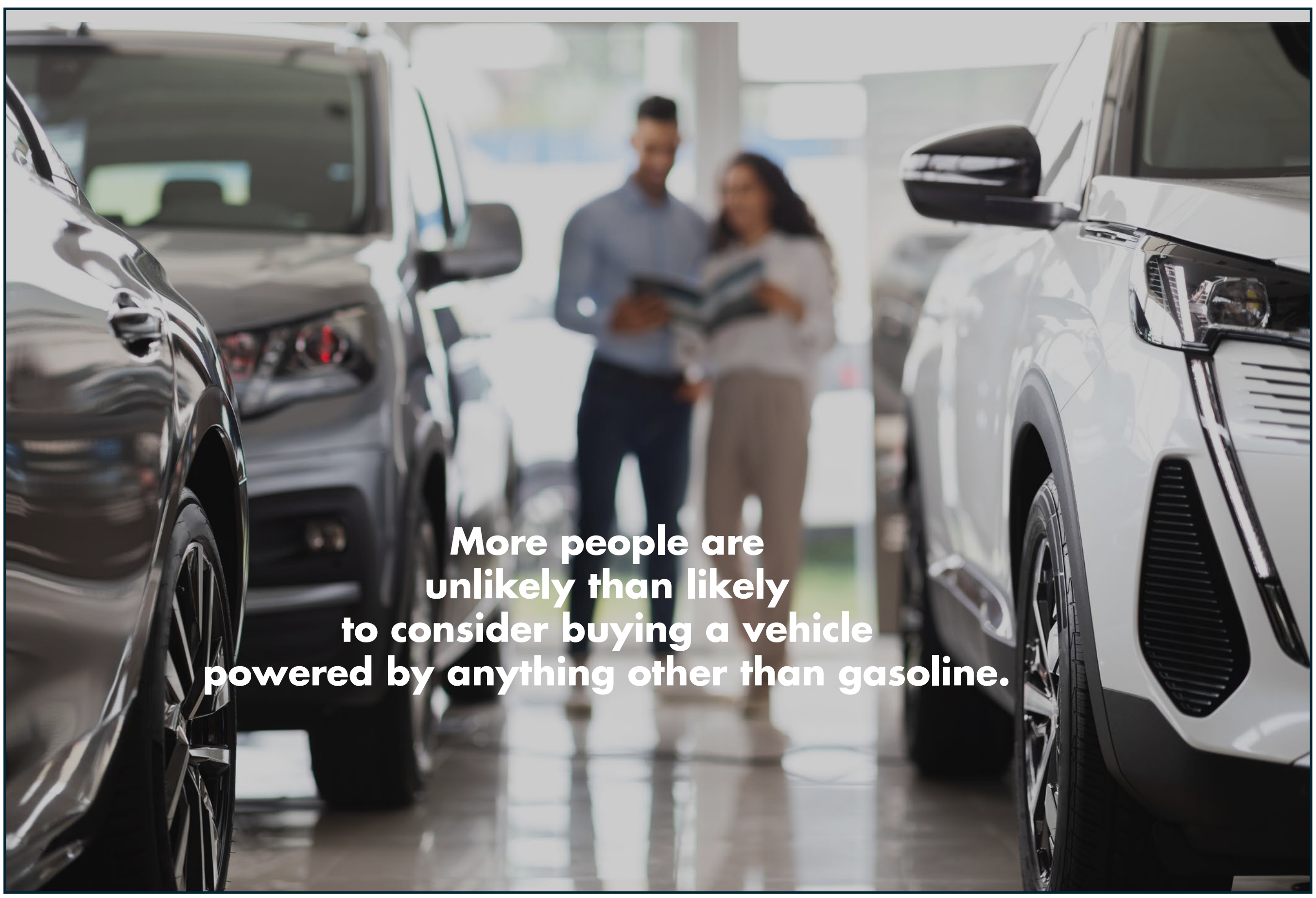

More people are
unlikely than likely
to consider buying a vehicle
powered by anything other than gasoline.

Figure 67: Likely to consider a gasoline vehicle

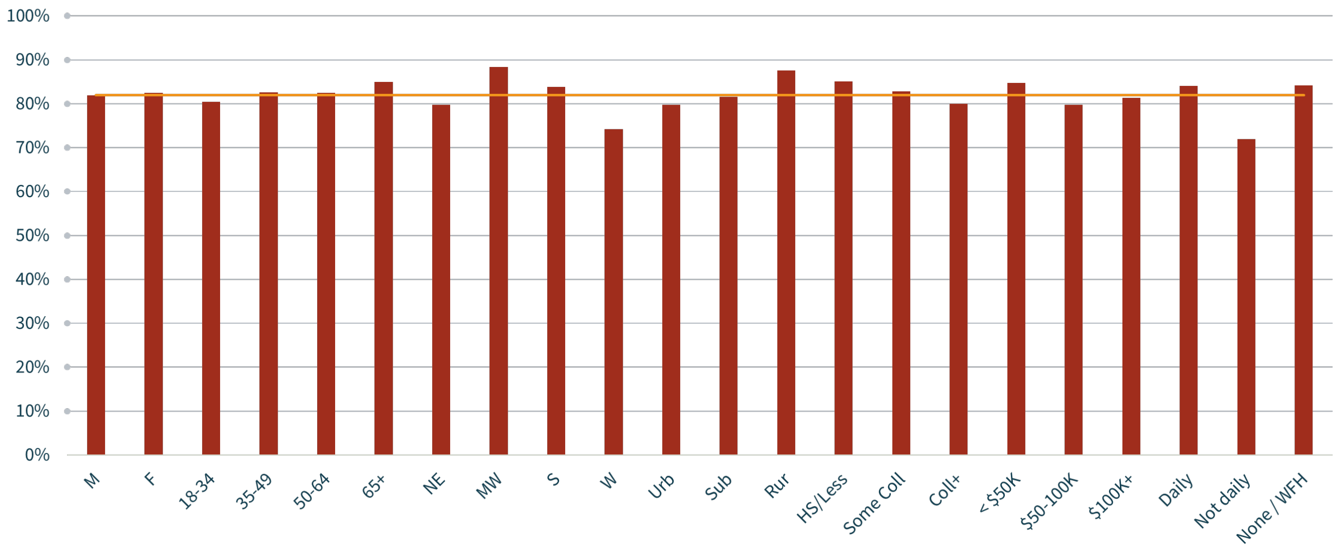
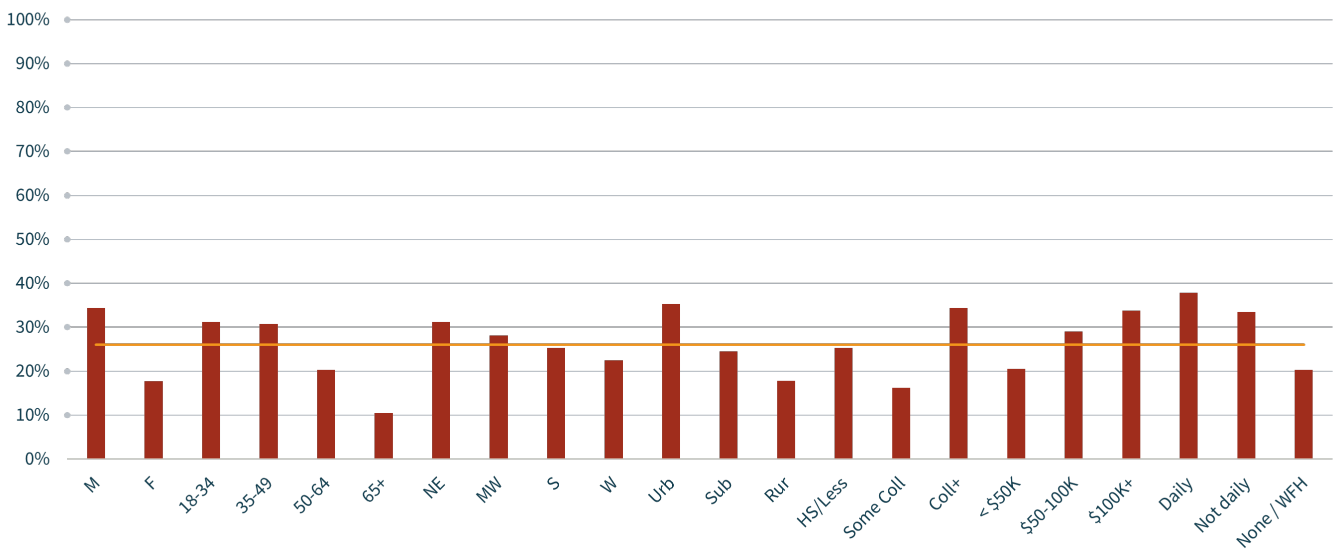


Figure 68: Likely to consider an FFV



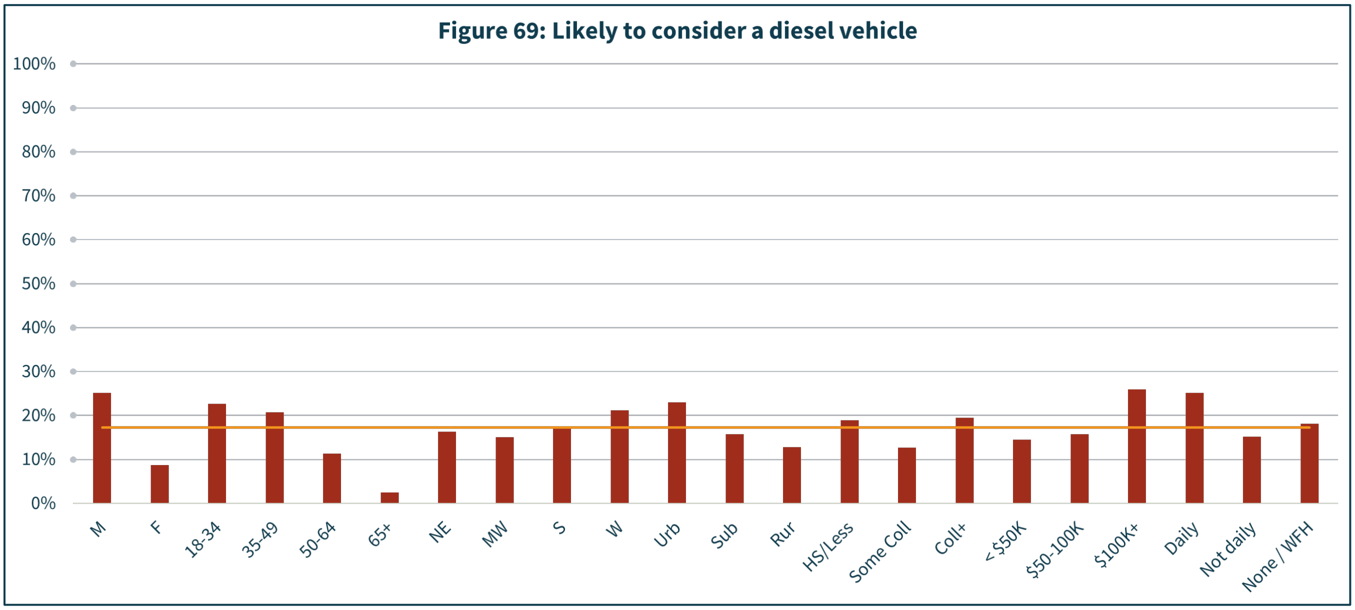


Figure 69: Likely to consider a diesel vehicle
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
M
F
18-34
35-49
50-64
65+
NE
MW
S
W
Urb
Sub
Rur
HS/Less
Some Coll
Coll+
< $50K
$50-100K
$100K+
Daily
Not daily
None / WFH

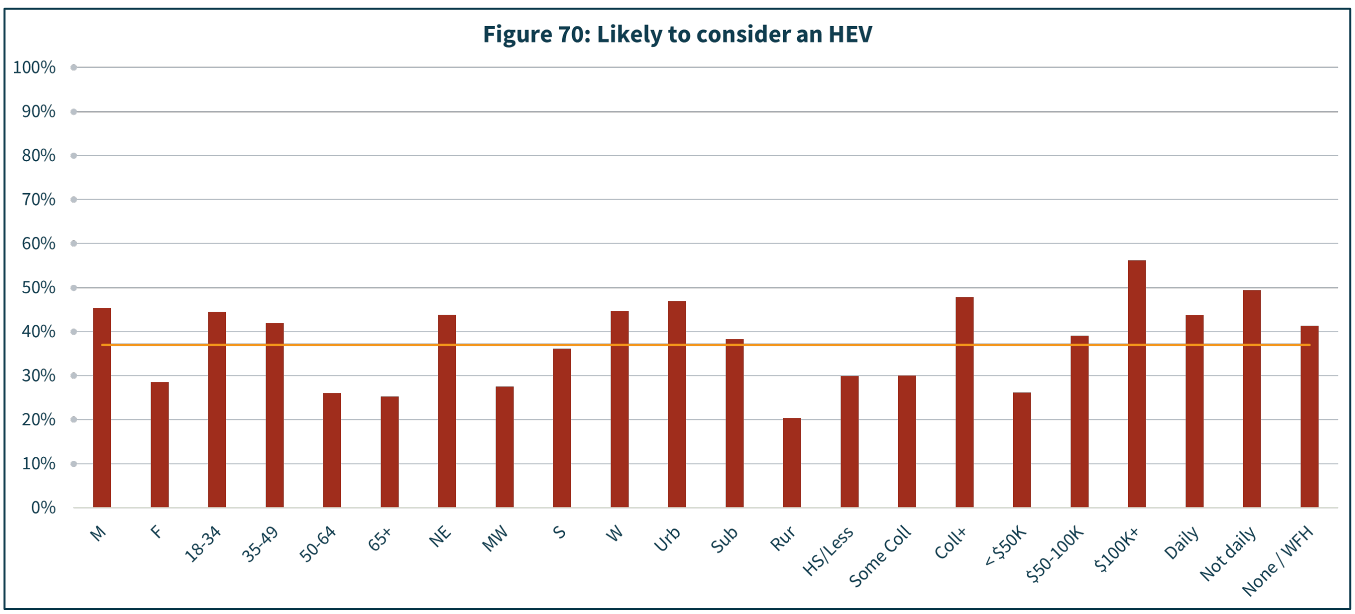


Figure 70: Likely to consider an HEV
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
M
F
18-34
35-49
50-64
65+
NE
MW
S
W
Urb
Sub
Rur
HS/Less
Some Coll
Coll+
< $50K
$50-100K
$100K+
Daily
Not daily
None / WFH

Figure 71: Likely to consider a PHEV

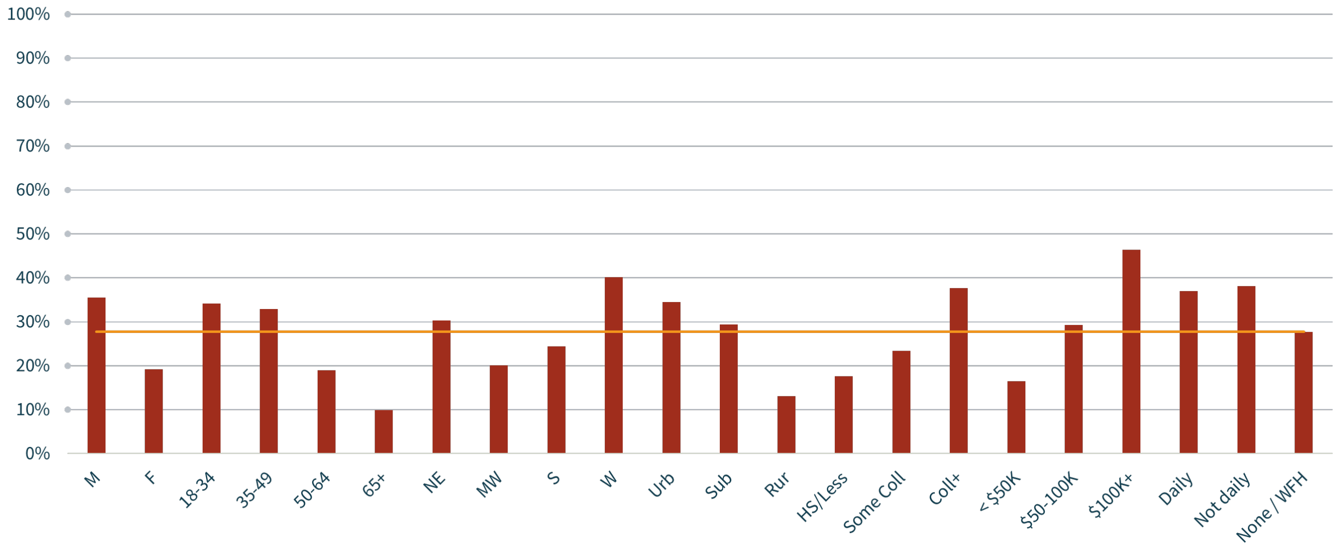
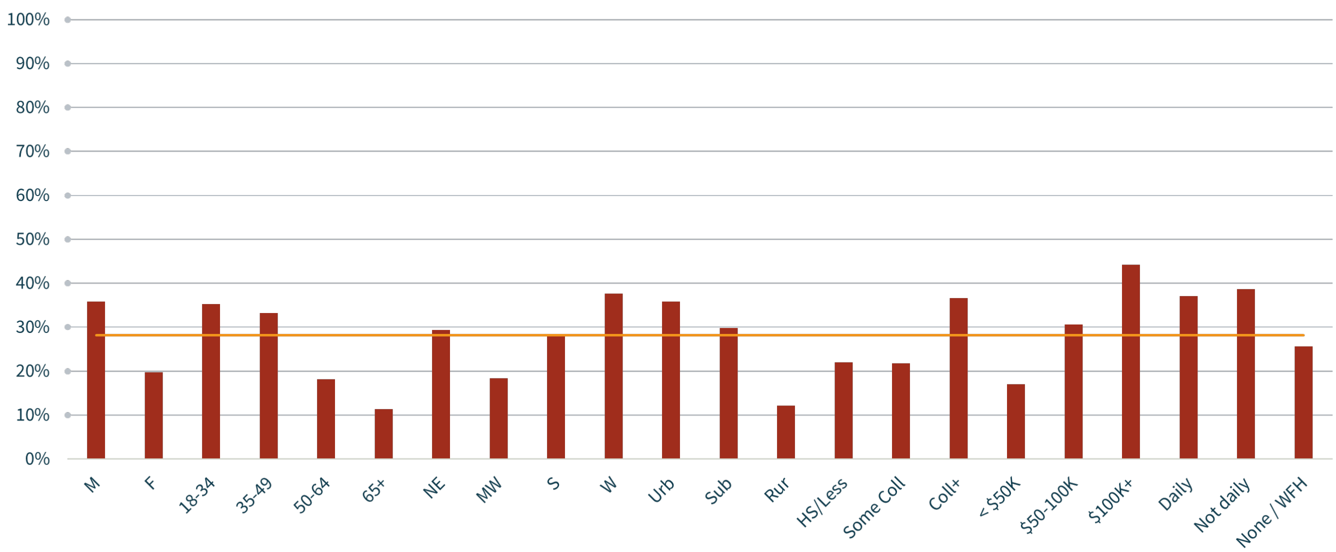


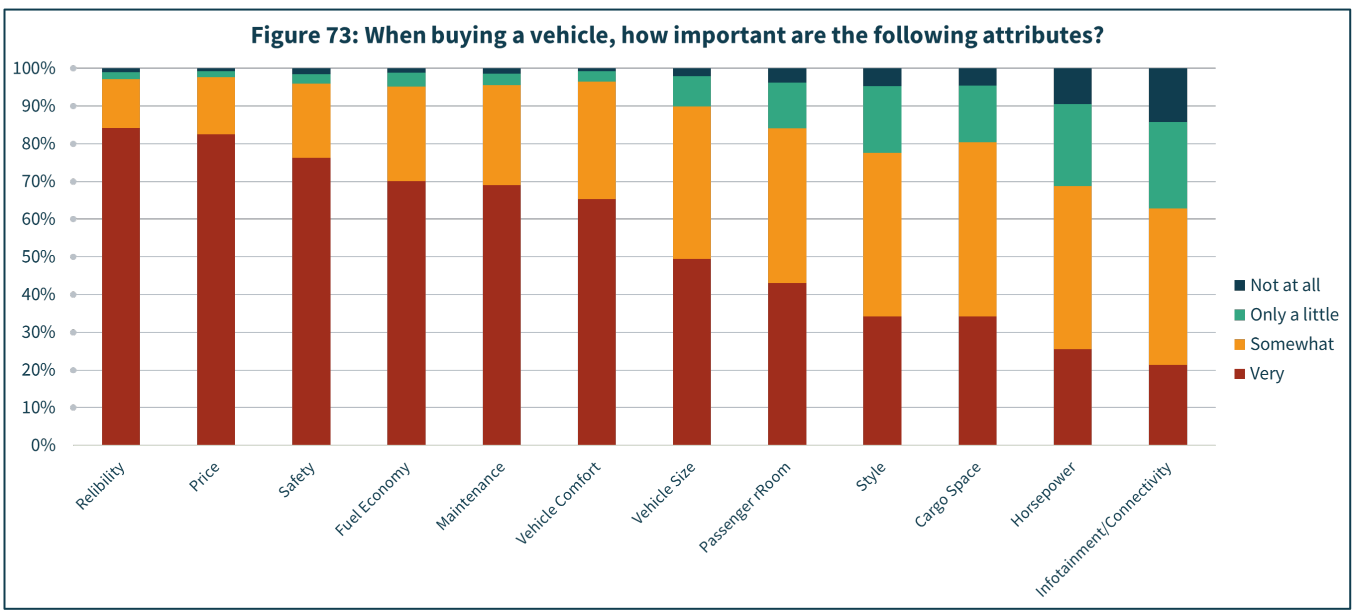
Figure 72: Likely to consider a BEV



Importance of Vehicle Attributes

Aside from powertrain options, consumers have a variety of vehicle features and attributes from which to select. Knowing which are most important can provide some insight into their potential decision-making process. When asked how important certain attributes would be to their decision to acquire a vehicle, reliability (84%) and price (83%) received the highest percentage of consumers ranking them as very important. Fuel economy (70%) came in fourth behind safety (76%). Only 25% of consumers ranked horsepower as very important, and only 21% said infotainment/connectivity was very important. Among the four top attributes, there was very little variation among different demographics groups ranking as very important.

When the question was changed to ask consumers to identify which attribute was MOST important, the priorities shifted, and purchase price became the priority at 38%. Reliability (17%), safety (16%), and fuel economy (11%) rounded out the top four. Horsepower (1%) and infotainment/connectivity (0%) continued to be the lowest priorities of consumers.



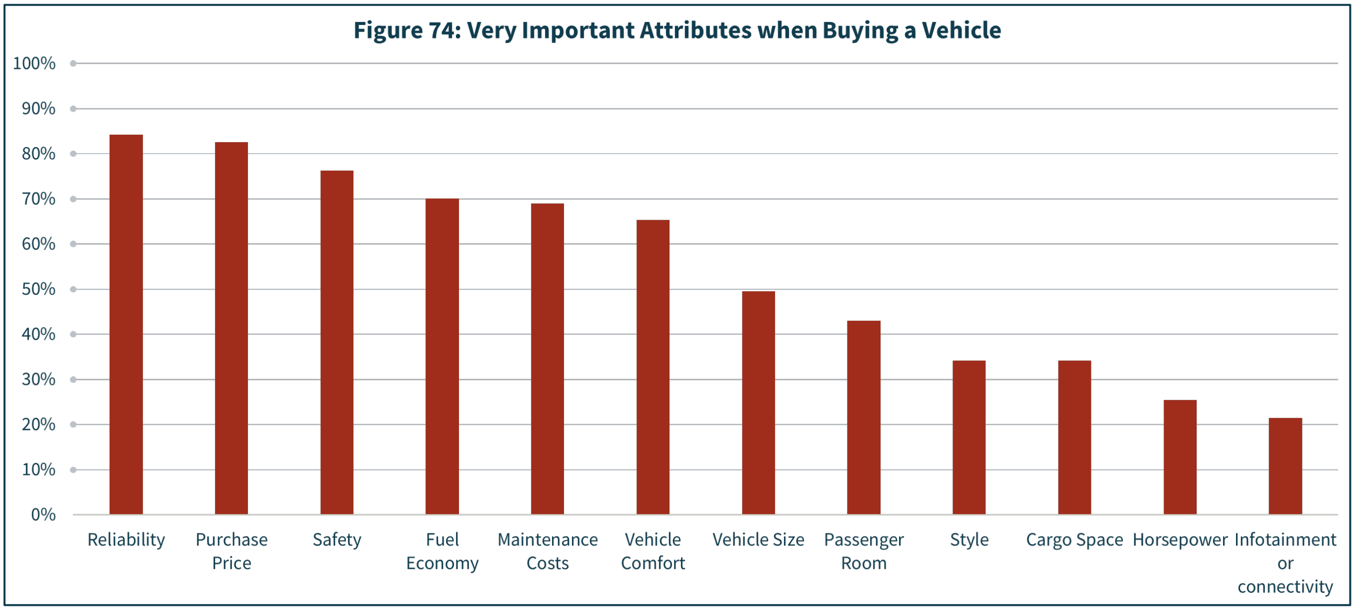


Figure 74: Very Important Attributes when Buying a Vehicle
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
Reliability
Purchase Price
Safety
Fuel Economy
Maintenance Costs
Vehicle Comfort
Vehicle Size
Passenger Room
Style
Cargo Space
Horsepower
Infotainment or connectivity

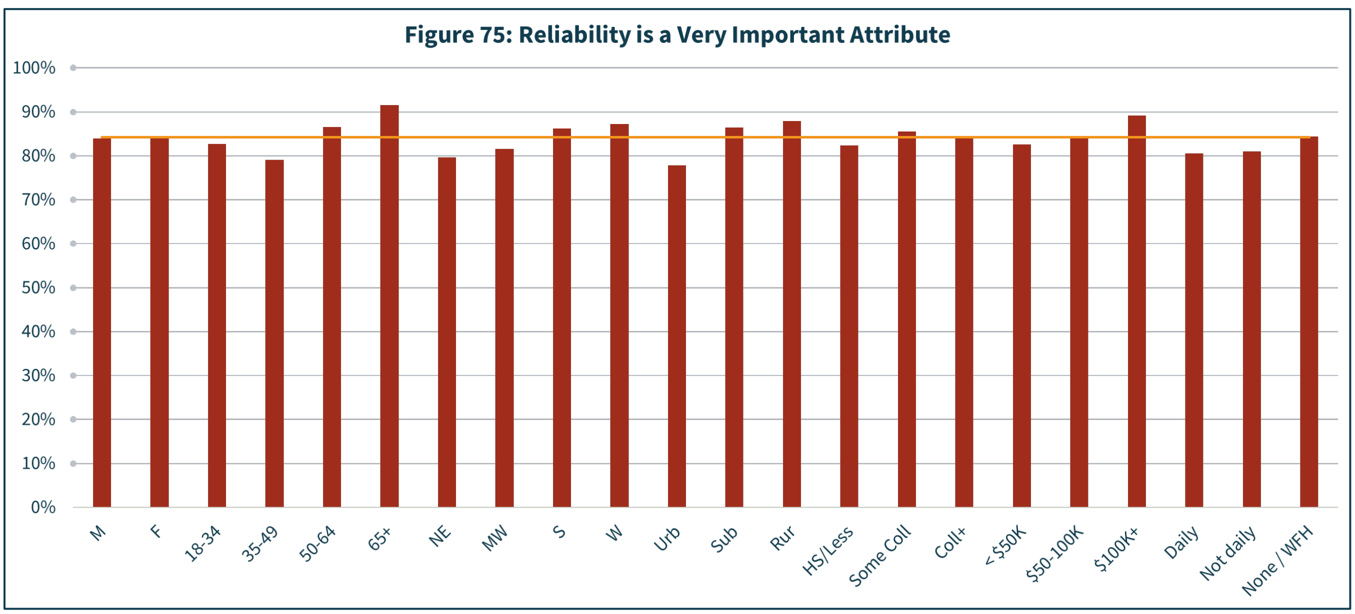


Figure 75: Reliability is a Very Important Attribute
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
M
F
18-34
35-49
50-64
65+
NE
MW
S
W
Urb
Sub
Rur
HS/Less
Some Coll
Coll+
< $50K
$50-100K
$100K+
Daily
Not daily
None / WFH

Figure 76: Purchase Price is a Very Important Attribute

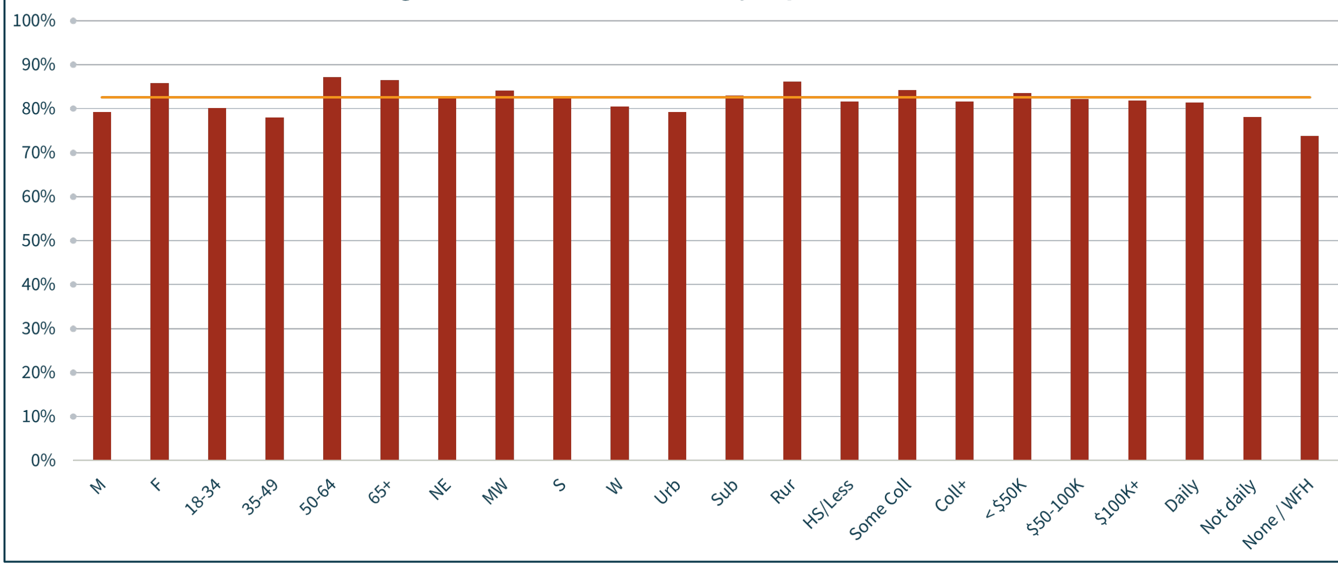


Figure 77: Safety is a Very Important Attribute

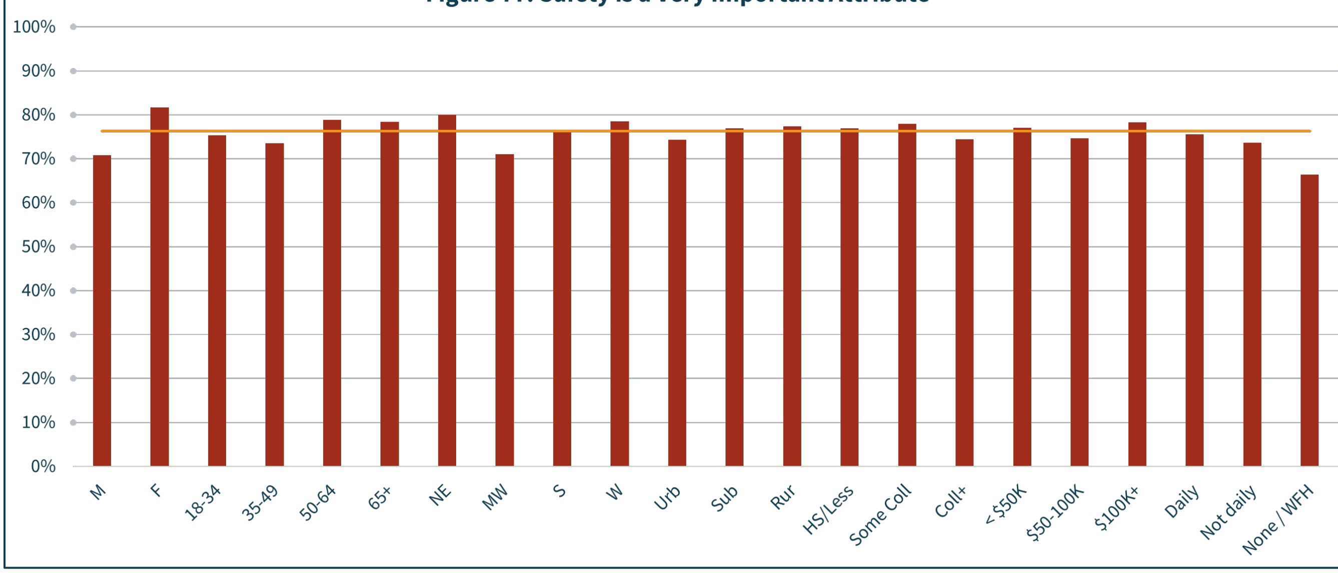


Figure 78: Fuel Economy is a Very Important Attribute

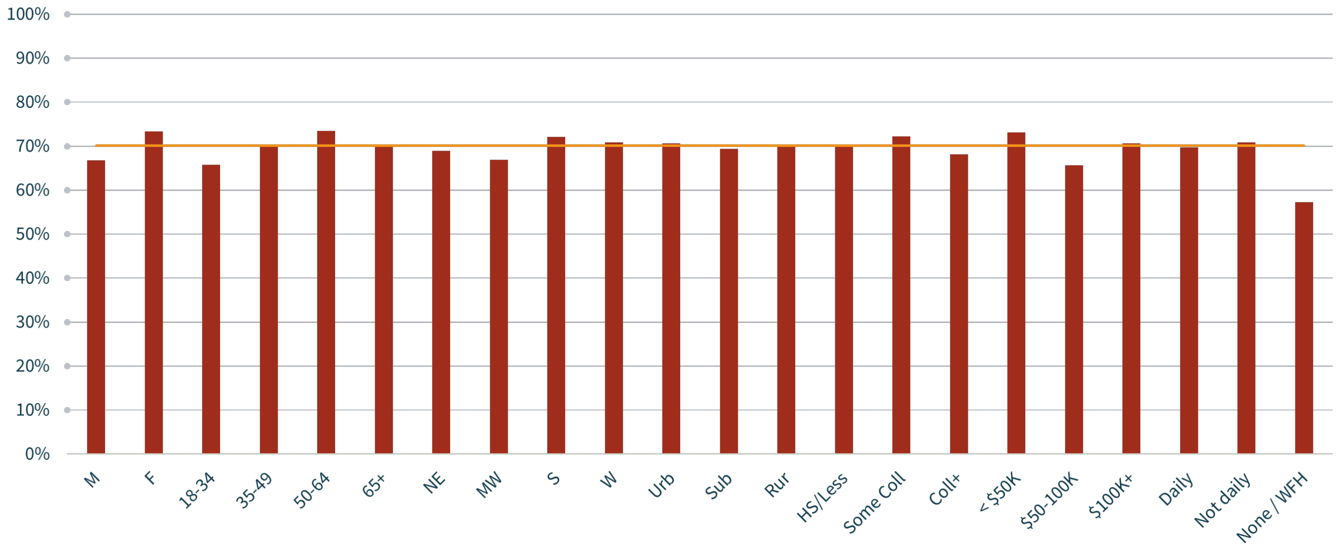
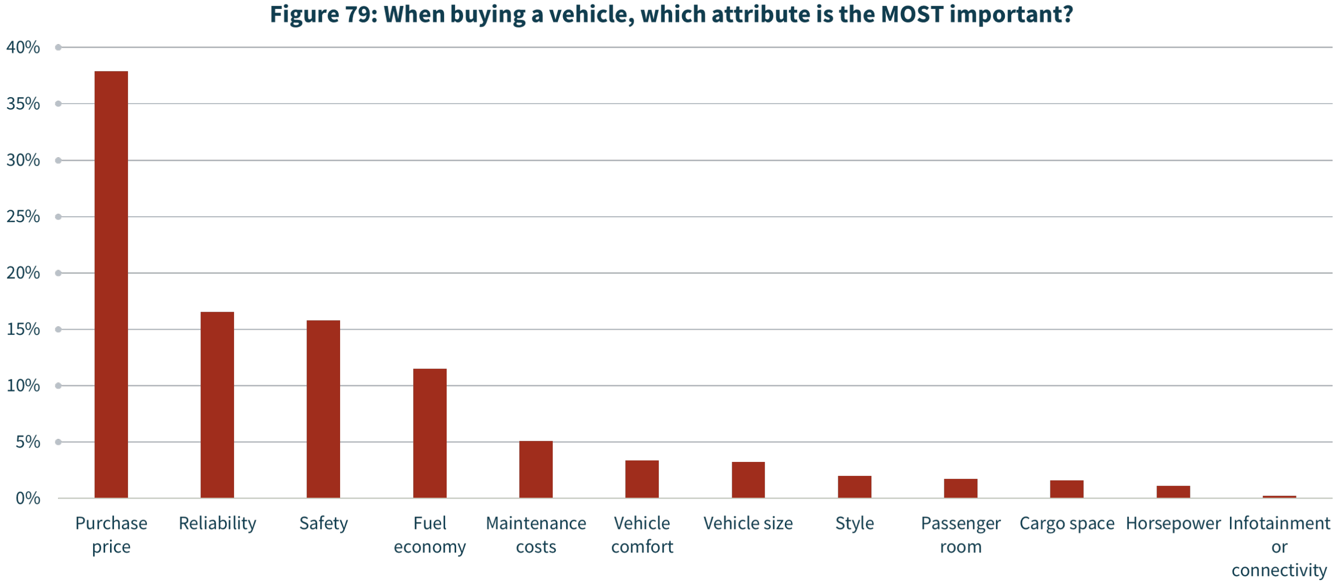


Figure 79: When buying a vehicle, which attribute is the MOST important?



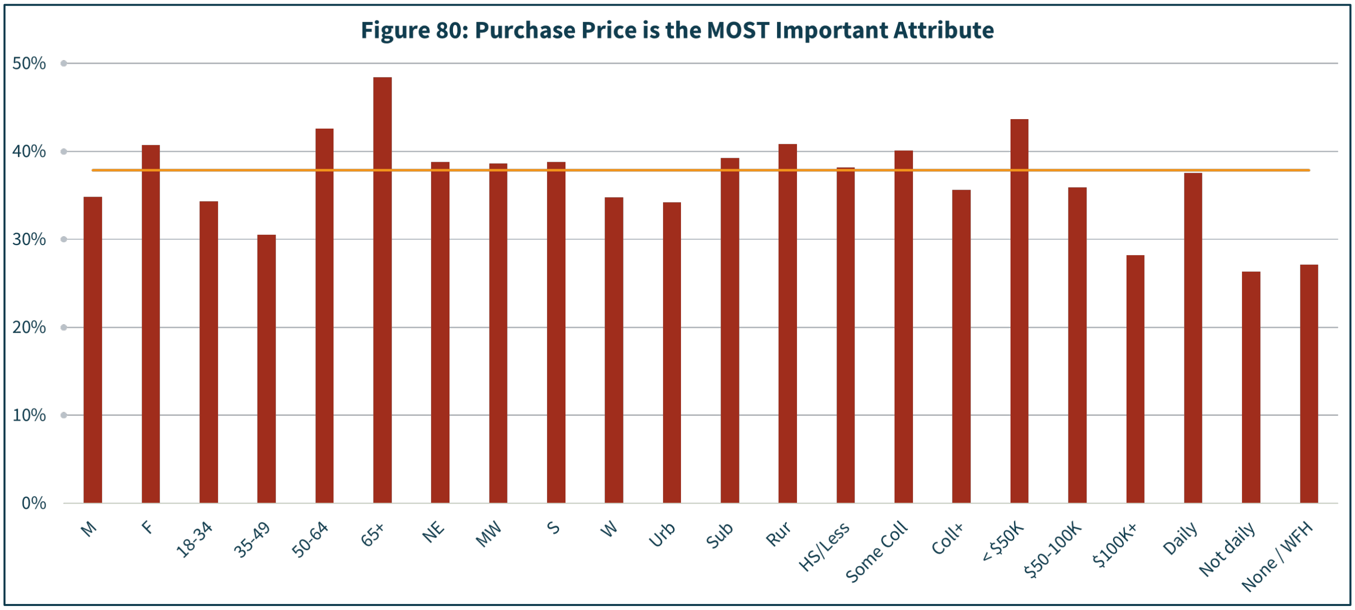


Figure 80: Purchase Price is the MOST Important Attribute
50%
40%
30%
20%
10%
0%
M
F
18-34
35-49
50-64
65+
NE
MW
S
W
Urb
Sub
Rur
HS/Less
Some Coll
Coll+
< $50K
$50-100K
$100K+
Daily
Not daily
None / WFH

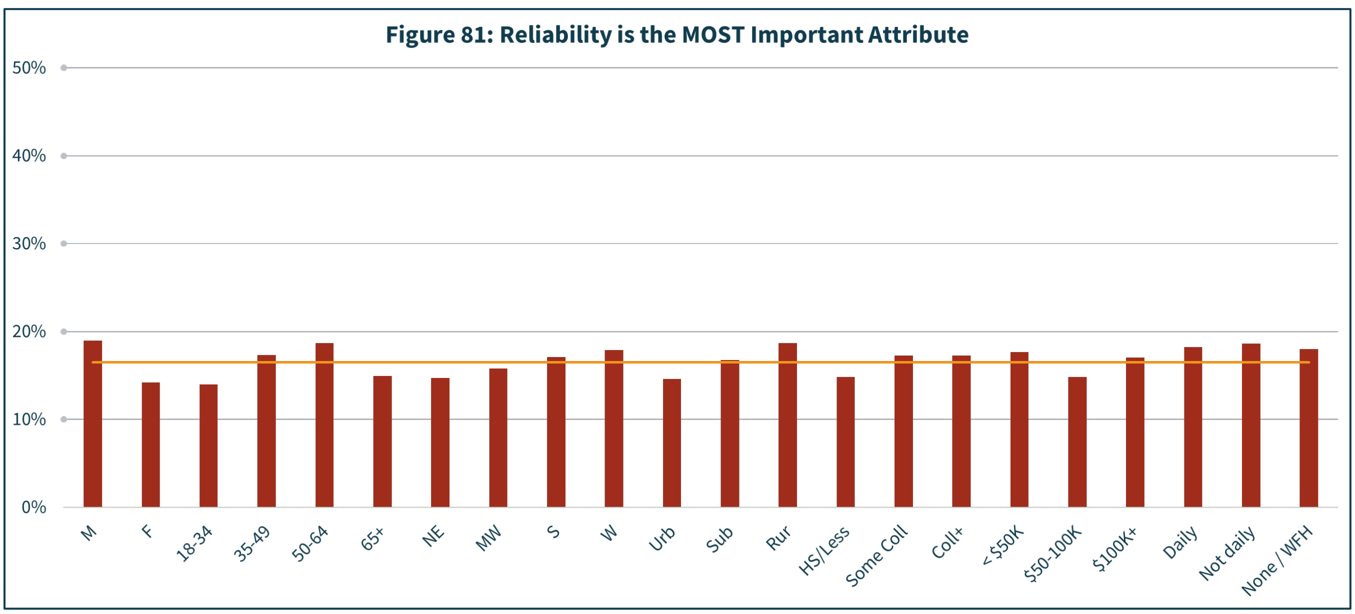


Figure 81: Reliability is the MOST Important Attribute
50%
40%
30%
20%
10%
0%
M
F
18-34
35-49
50-64
65+
NE
MW
S
W
Urb
Sub
Rur
HS/Less
Some Coll
Coll+
< $50K
$50-100K
$100K+
Daily
Not daily
None / WFH

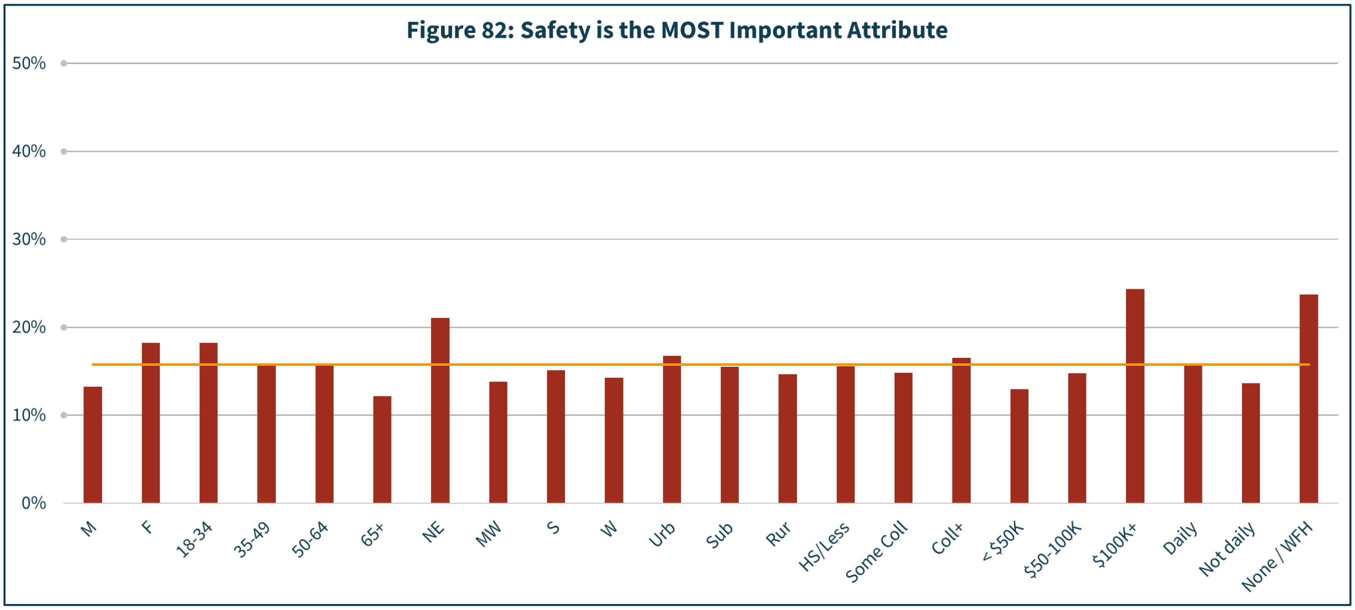


Figure 82: Safety is the MOST Important Attribute
50%
40%
30%
20%
10%
0%
M
F
18-34
35-49
50-64
65+
NE
MW
S
W
Urb
Sub
Rur
HS/Less
Some Coll
Coll+
< $50K
$50-100K
$100K+
Daily
Not daily
None / WFH

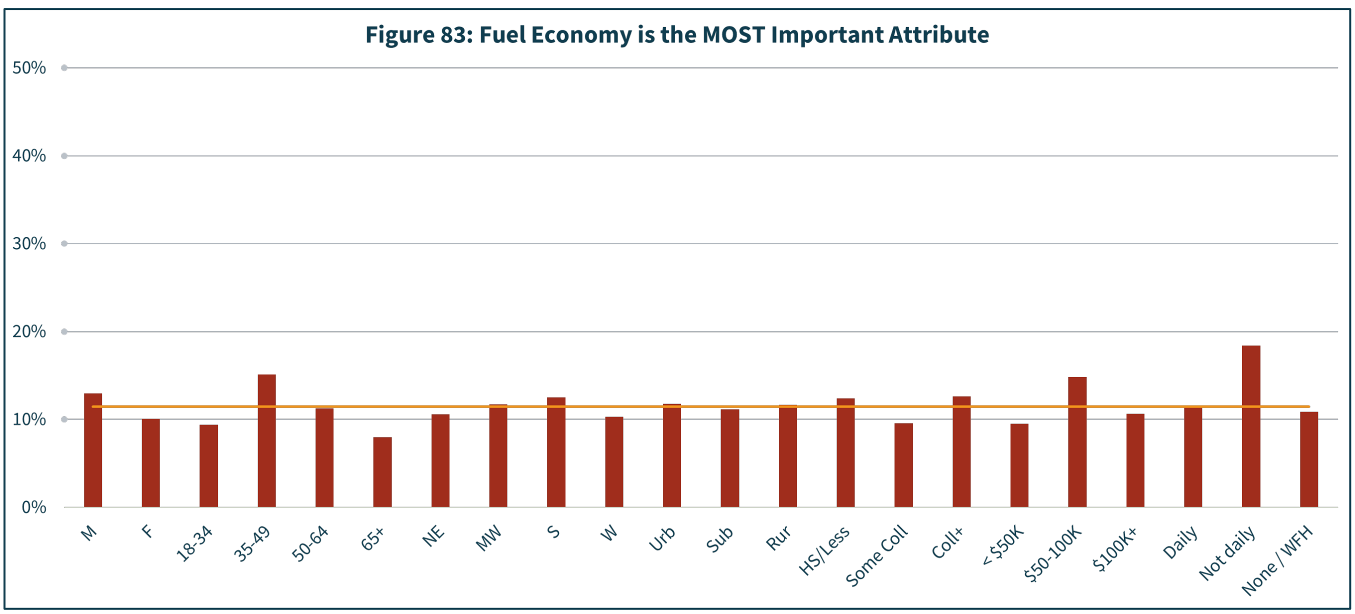


Figure 83: Fuel Economy is the MOST Important Attribute
50%
40%
30%
20%
10%
0%
M
F
18-34
35-49
50-64
65+
NE
MW
S
W
Urb
Sub
Rur
HS/Less
Some Coll
Coll+
< $50K
$50-100K
$100K+
Daily
Not daily
None / WFH

Attitudes Towards Alternatives

Three trends that have been seen as potentially disruptive to the current transportation energy sector have been the growth of electric vehicles, the development of autonomous vehicles (AVs), and the expansion of rideshare/on-demand ride service companies. The future of each of these trends is dependent upon consumer acceptance. According to the survey, less than half of consumers have a positive feeling about any of these trends. Nearly half (49%) said they have a positive attitude towards rideshare services and 44% have a positive attitude towards BEVs, but only a quarter (25%) have a positive attitude towards AVs. This does not mean more than half have a negative attitude, there are many who have no opinion. Only 17% have a negative attitude towards rideshare, 29% are negative towards BEVs and 50% are negative towards AVs.

When asked if their view had changed in the past year, the majority said their attitudes were unchained, 31% were more positive towards BEVs, 23% more positive towards AVs, and 29% more positive towards rideshare. TEI asked this same question in 2024 and respondents to that survey indicated a 40% positive attitude towards BEVs (indicating a four-point improvement this year), the same 25% positive towards AVs and 45% positive towards rideshare (another four-point improvement).

Figure 84: Please indicate your current attitude towards...

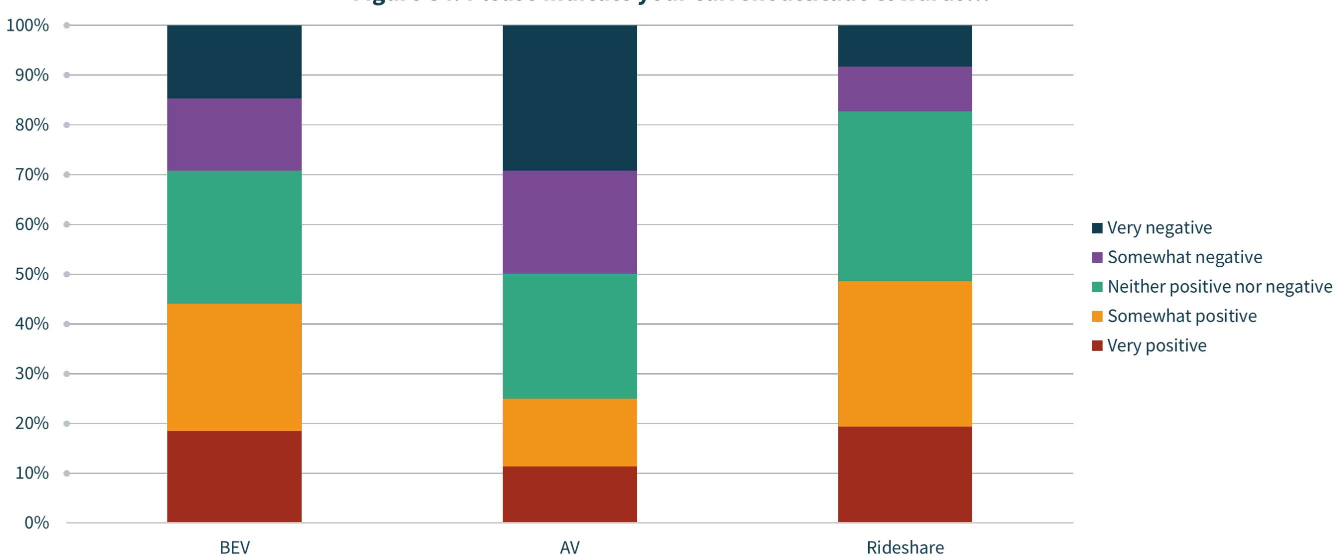


Figure 85: How has your view changed in the past year

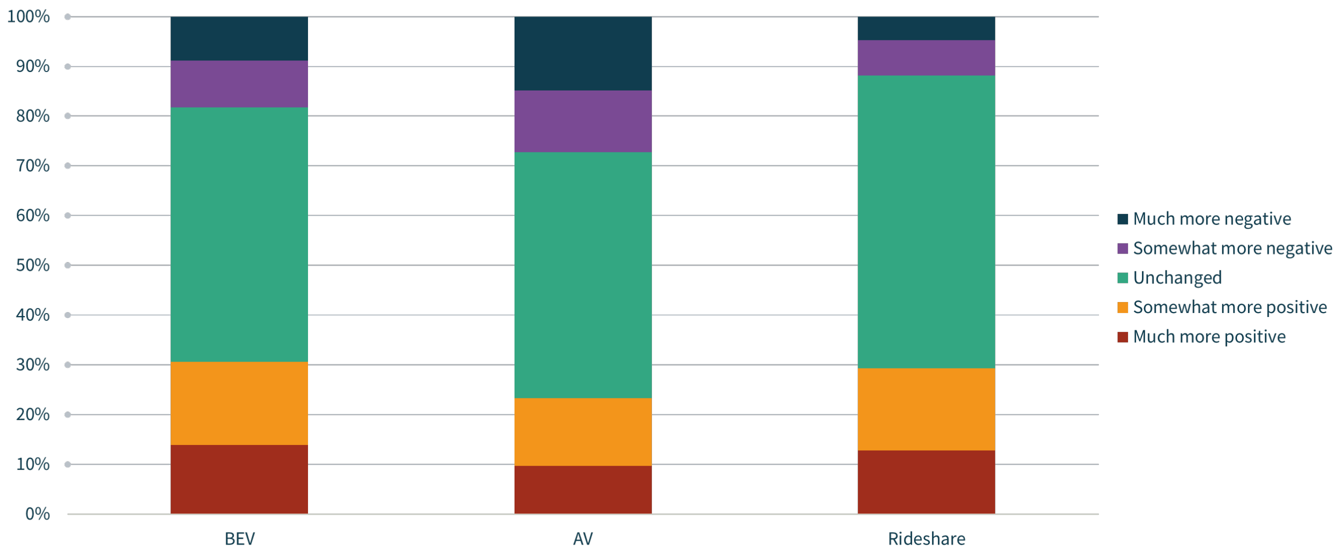
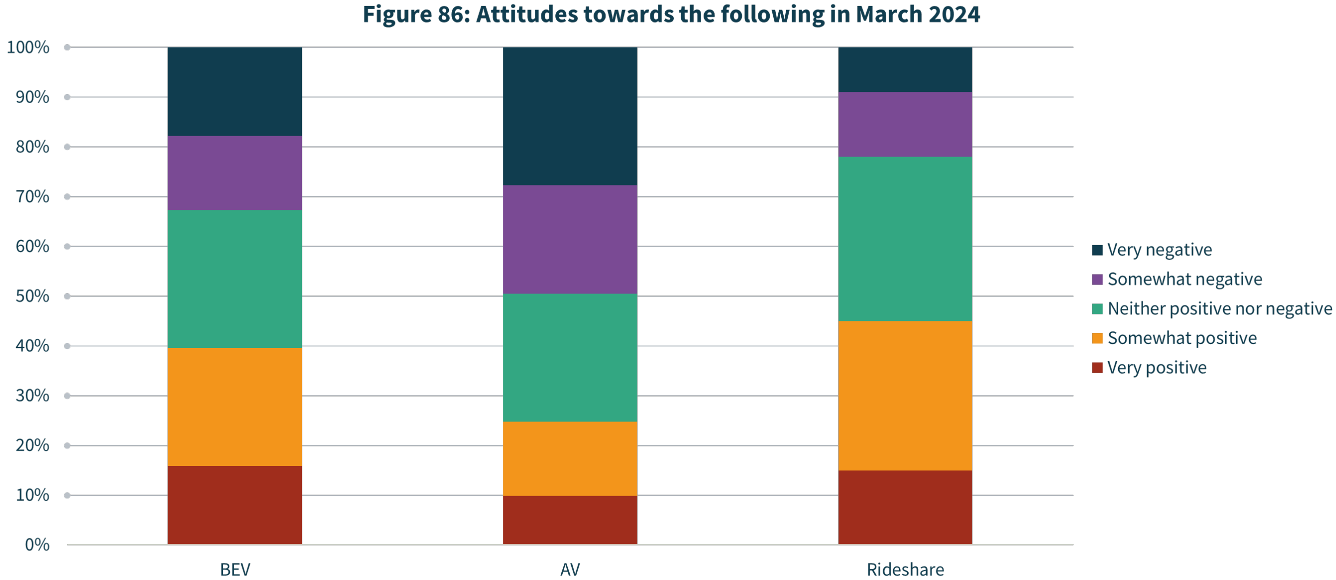


Figure 86: Attitudes towards the following in March 2024



Battery Electric Vehicles

Looking specifically at BEVs, 18% of consumers have a very positive attitude towards the vehicles, up from 16% last year. Comparing the responses of certain demographic groups, those possessing a more positive attitude were found among consumers 18 – 34 years of age (58%), 35 - 49 years (52%), those living in urban communities (52%), those with college educations (55%), those earning $100,000 (64%) and those who commute (55% and 59%, respectively for daily and not daily). Below the average were those 50 - 64 years of age (32%), those 65 years and older (27%), those living in the Midwest (34%), and those living in rural communities (27%).

For those who indicated they currently had a "Very Positive" or "Very Negative" attitudes towards electric vehicles, the survey asked for them to explain why they felt that way in their own words. Below is a summary of their open-ended responses.

Very Positive Attitudes towards Electric Vehicles

An analysis of the 215 survey respondents (18%) who provided an open ended response to explain why they had a "Very Positive" attitude towards electric vehicles, the most frequent response was related to environmental benefits. Respondents frequently mentioned the following in their comments:

- "Better for the environment" (mentioned in various phrasings countless times)
- "Less pollution" / "Reduces emissions" / "No emissions"
- "Helps mitigate climate change" / "Combat climate change" / "Good for the planet"
- "Cleaner air"
- "Eco-friendly" / "Environmentally friendly"
- "Sustainable" / "Environmental conservation"
- "Reduce dependence on fossil fuels" / "Don't use gas"

The second most frequent responses were related to financial considerations, with respondents frequently mentioning in their comments:

- "Saves money" / "Cheaper"
- "Saves on gas" / "Don't have to pay for gas"
- "More cost effective"
- "Cheaper to operate over time"
- "Less maintenance"

A third category of frequent responses were related to advanced technology of the vehicles, with respondents frequently mentioning in their comments:

- "The future" / "Future of transportation" / "Next generation"
- "Awesome technology" / "Technology keeps improving" / "Advancing"
- "Innovation" / "Modern age"

Other less frequent responses related to the performance and driving experience and the convenience and practicality they associated with electric vehicles.

Very Negative Attitudes towards Electric Vehicles

An analysis of the 184 survey respondents (15%) who provided an open ended response to explain why they had a "Very Negative" attitude towards electric vehicles, the most frequent response was related to charging infrastructure and convenience. Respondents frequently mentioned the following in their comments:

- "Not enough charging stations" / "Hard to find electric replacement stations"
- "Takes too long to charge" / "Time consuming to charge" / "Waiting on to be able to use"
- "Don't like depending on electric places to charge"
- "Not practical" (often tied to charging)
- "Limited infrastructure to support them"
- Concerns about charging at home ("additional charges to set up a charger") or in apartments.
- Issues with range ("Can't go long distances," "range is too short," "don't go far enough for travel").
- Getting stranded ("run out of charge," "lose power in snowstorms").

The second most frequent responses were related to financial considerations, with respondents frequently mentioning in their comments:

- "Too expensive to buy" / "Cost way too much" / "Too expensive upfront"
- "Batteries are too expensive to replace" / "Cost of the battery"
- "Expensive to maintain" / "Cost of repairs is higher"
- "Additional charges to set up a charger in your home."

A third category of frequent responses were related to environmental claims and battery disposal, with respondents frequently mentioning in their comments:

- "Don't really help the environment" / "Not as green as claimed"
- "Electricity comes from fossil fuels" / "Still have to burn fossil fuel for the electricity"
- "Batteries are toxic" / "Hard to get rid of" / "No way to dispose of them"
- "Lithium mining causes environmental harm" / "Negative environmental impact from lithium mining"
- "No system for disposal or recycling of used batteries."
- "Graveyards filled with these batteries."

Other less frequent responses related to safety and reliability, power grid and government influence and personal preference.

Figure 87: Current Attitudes Towards BEVs

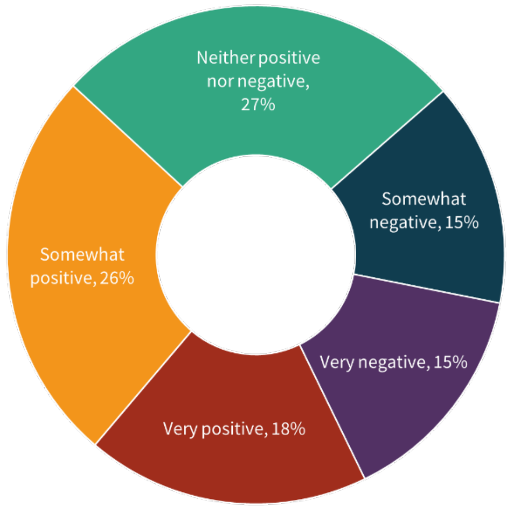
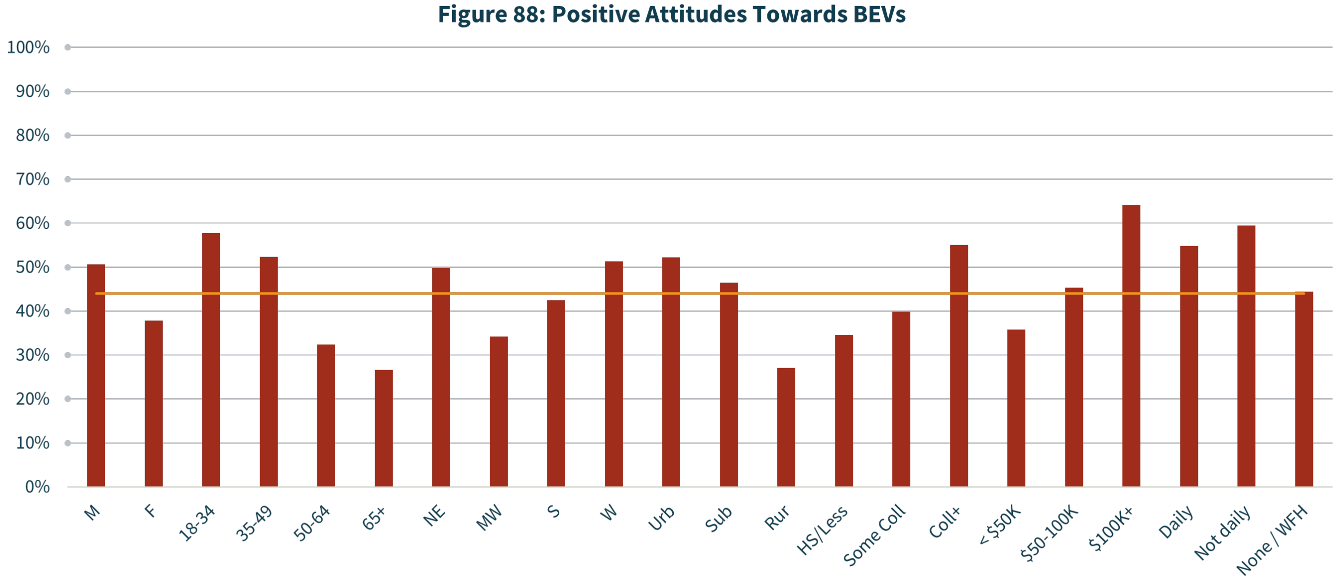


Figure 88: Positive Attitudes Towards BEVs



Change in Attitudes toward Electric Vehicles

Nearly one-third (31%) of consumers said they have a more positive attitude towards BEVs this year, with 18 - 34 years olds (45%) and those earning $100,000 (49%) representing those whose attitudes have improved the most and those in the Midwest (28%), those 65 years and older (25%) and those possessing a high school or less education (25%) representing those whose attitudes become more negative.

Figure 89: How has your view towards BEVs changed in past year?

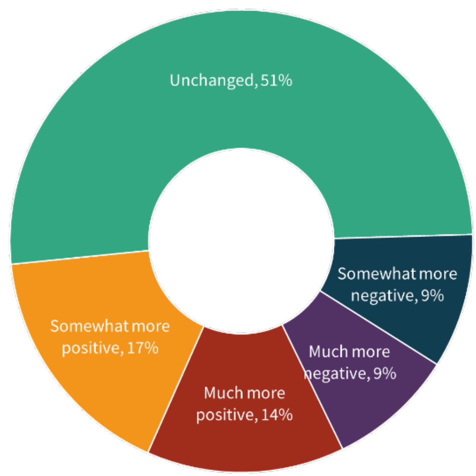
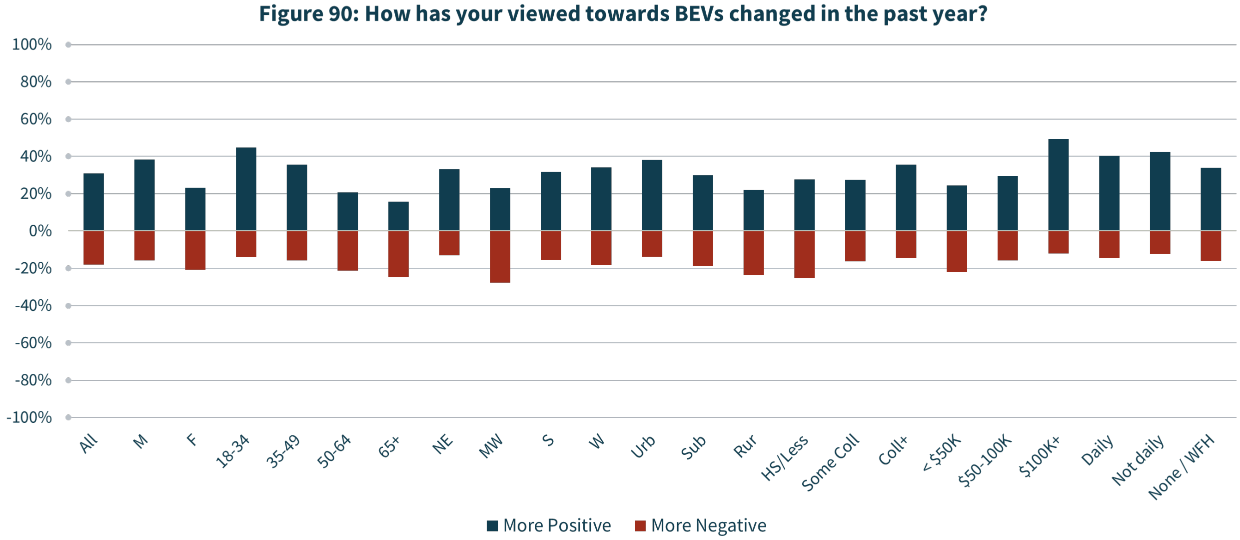


Figure 90: How has your viewed towards BEVs changed in the past year?



Autonomous Vehicles

Consumer attitudes towards AVs have not significantly improved. While 25% indicated a positive attitude towards the technology, 50% possess a negative attitude, the same ratio as reported in last year's survey. That said, 23% of consumers said they are more positive about AVs this year and 27% said they are more negative. In general, only 11% said they are very positive towards the technology while 29% said they are very negative.

Men (35%), 18 - 34 year olds (36%), those earning $100,000 (37%) and those who commute (34% daily and 36% not daily) possess more positive attitudes about the technology. Meanwhile, women (16%), those 65 years and older (11%) and those in rural communities (16%) were much less positive about AVs.

While half (49%) of consumers have not changed their attitude, 10% are much more positive and 15% are much more negative. Once again, those 18 - 34 (35%) have developed a more positive attitude, as have those earning $100,000 (38%). One-third (33%) of women possess a more negative attitude than last year, as do those 65 years or older (34%).

Figure 91: Current Attitudes Towards AVs

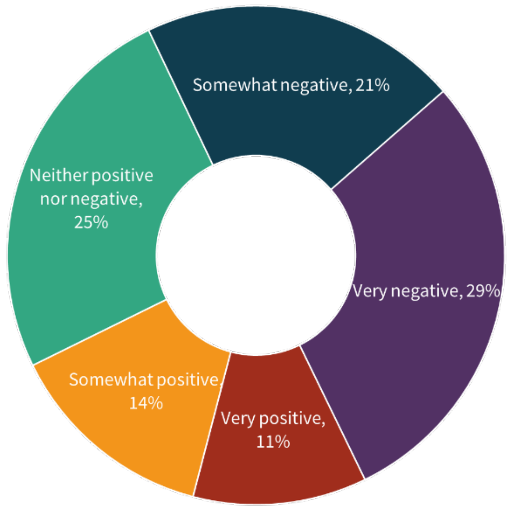


Figure 92: Positive Attitudes Towards AVs

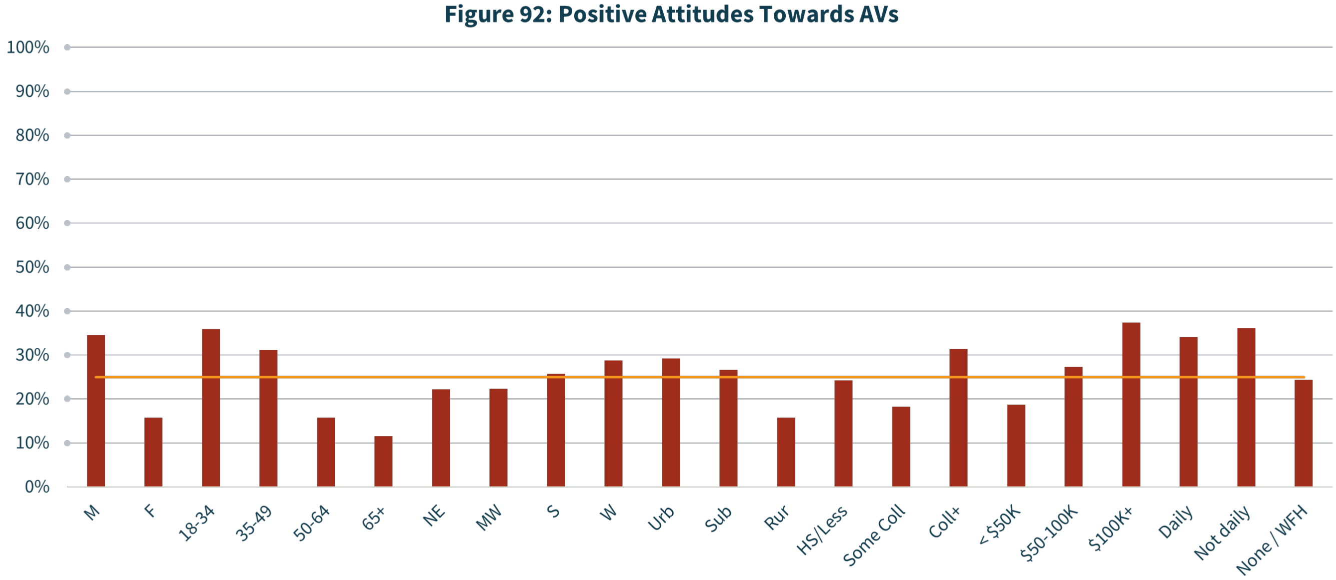


Figure 93: How has your view towards AVs changed in the past year?

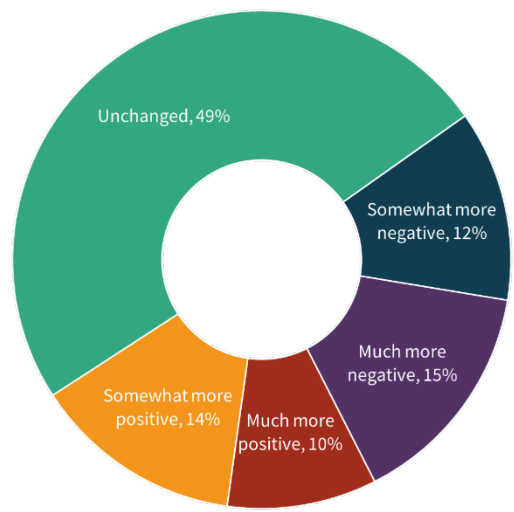
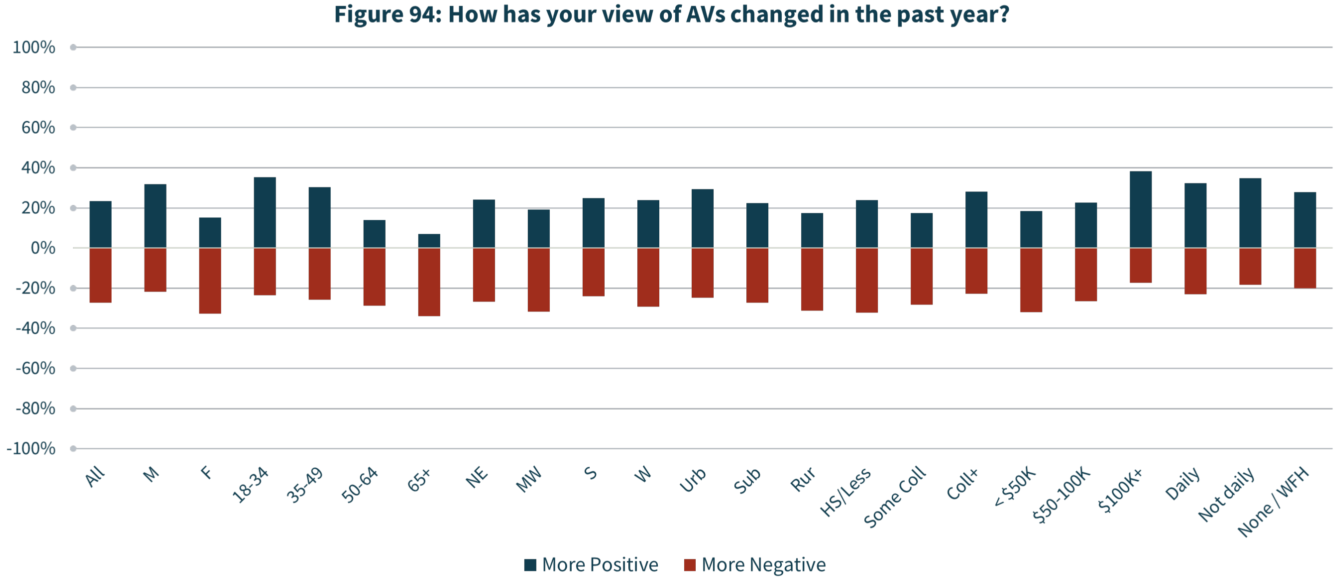


Figure 94: How has your view of AVs changed in the past year?



Rideshare

Nearly half of consumers (49%) have a positive attitude towards rideshare and only 17% possess a negative attitude, which is an improvement over last yar when 45% were positive and 22% were negative. Nearly one-in-five (19%) are very positive towards the service. Almost one-third (29%) have developed a more positive attitude in the past year, while 12% have become more negative towards the service.

There was not much variation among demographic groups, with the notable exception of those living in rural communities (32%) lagging far behind suburban (50%) and urban (59%) dwellers in terms of their positive attitude. Those 65 years and older (27%) are also less likely to be very positive about the service. Consumers 18 - 34 years old (39%), 35 – 49 years old (38%), those living in urban communities (39%), those earning $100,000 (41%), and those commuting on a non-daily basis (39%) developed much more positive attitudes than other demographic groups.

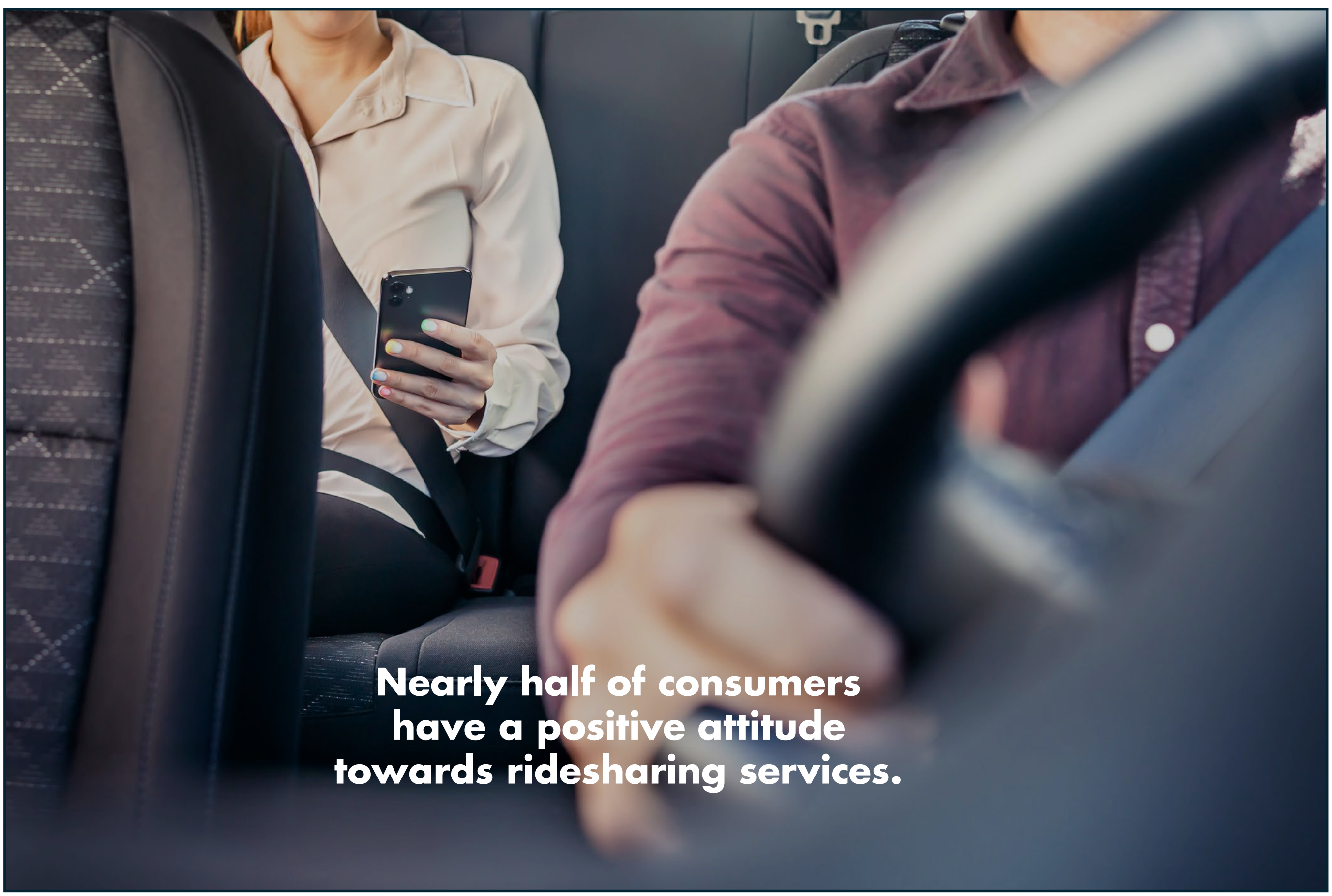


Figure 95: Current Attitudes Towards Rideshare/On Demand

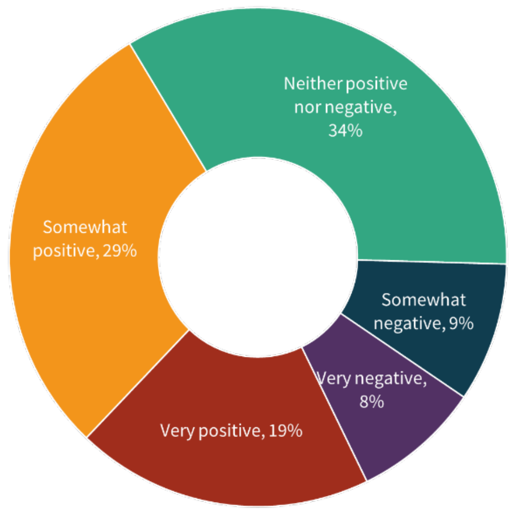


Figure 96: Positive Attitudes Towards Rideshare/On Demand

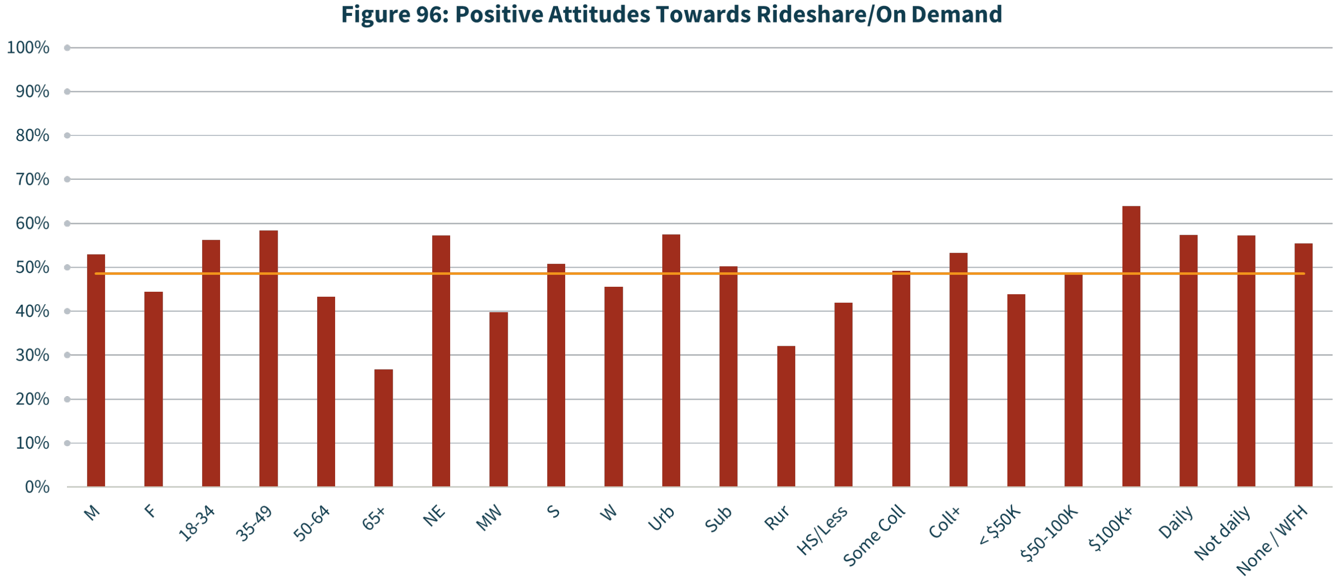


Figure 97: How has your view towards rideshare/ on demand services changed in the past year?

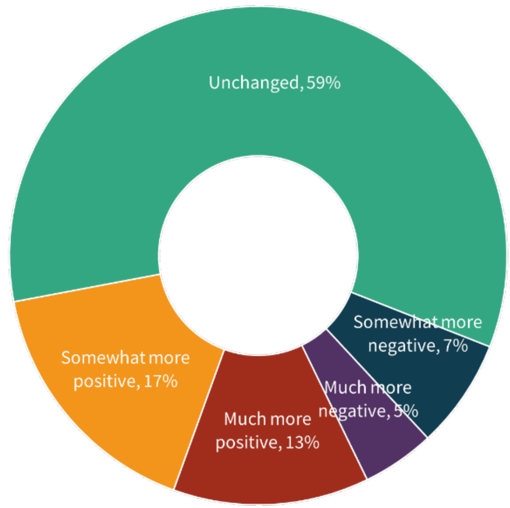
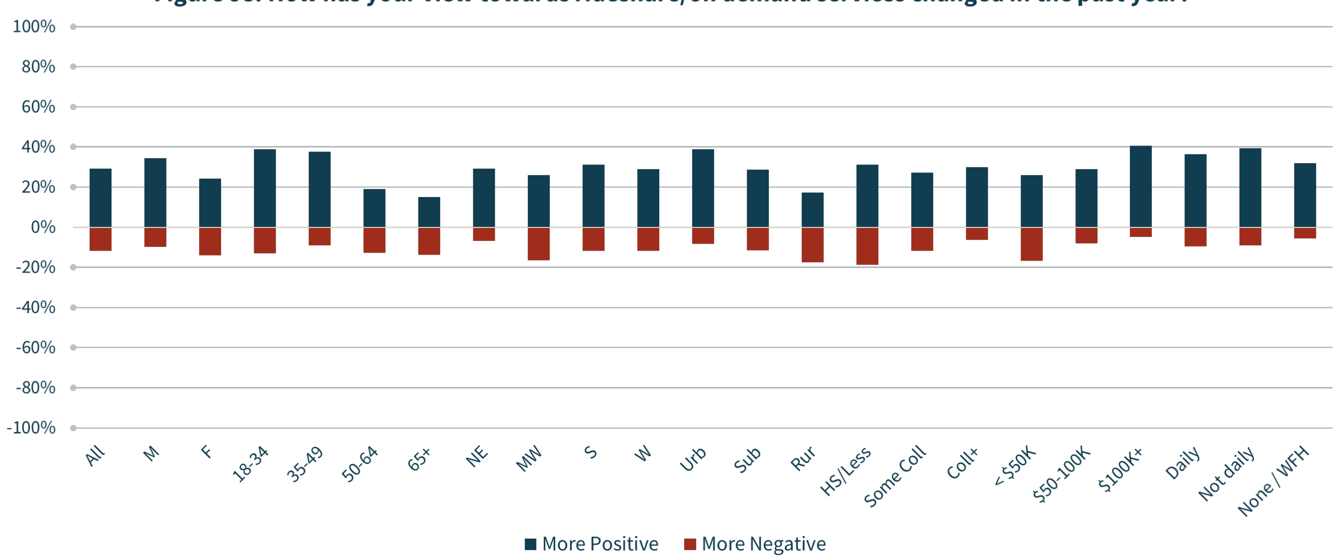


Figure 98: How has your view towards rideshare/on demand services changed in the past year?



Electric Vehicles and Charging

When it comes to the market for EVs, there remains a disconnect between how many EVs consumers think are being sold and what is actually happening. In 2024, BEVs represented 7.79% of all light duty vehicles sold, according to Wards Intelligence. Yet consumers on average think 28% of vehicles sold last year were BEVs. This is likely a reflection of the amount of media attention paid to BEVs over the past several years and a reminder that consumers do not track vehicle sales numbers.

Moving beyond that challenging question for consumers, 7% of consumers report seeing EVs being driven or charged in the area where they live or work extremely often. Another 17% report seeing them very often and 21% somewhat often. On the other hand, 8% said they never see EVs, 19% see them rarely, and 22% see them occasionally. EVs are most often seen among those 18 - 34 years old (36%), those living in the West (39%), those earning $100,000 (34%), and those commuting daily (34%). Those seeing EVs least often include those 65 years and older (40%), those in the Midwest (36%), those in rural communities (45%), and those earning less than $50,000 (35%).

A key factor in EV adoption is the availability of charging. More than half of consumers (53%) said they have a suitable place at home to charge an EV, while only 37% said they do not. Charging availability was more prevalent among those with a college education (65%) and those earning $100,000 (79%) and least prevalent among those with a high school education or less (43%) and those earning less than $50,000 (40%).

When thinking about charging away from home, the majority of consumers (59%) said that finding a place to charge in their community would be hard, with 22% saying it would be very hard. On the other hand, 12% said it would be very easy. Among those who think it would be easy were 18 – 34-year-olds (56%), those in the West (51%), those living in urban communities (48%), those earning $100,000 (51%), and those commuting daily (50%). Those who thought it would be difficult included those 65 years and older (76%), those living in the Midwest (66%), those in rural communities (74%), those earning less than $50,000 (64%) and those who do not commute or work from home (66%).

Overall, consumers (73%) felt that chargers should be installed at convenience stores/gas stations. In addition, 63% think they should be installed at shopping malls/strip malls, 57% said grocery stores and 56% said hotels. Restaurants (40%) and fast-food restaurants (30%) were much further down the list.

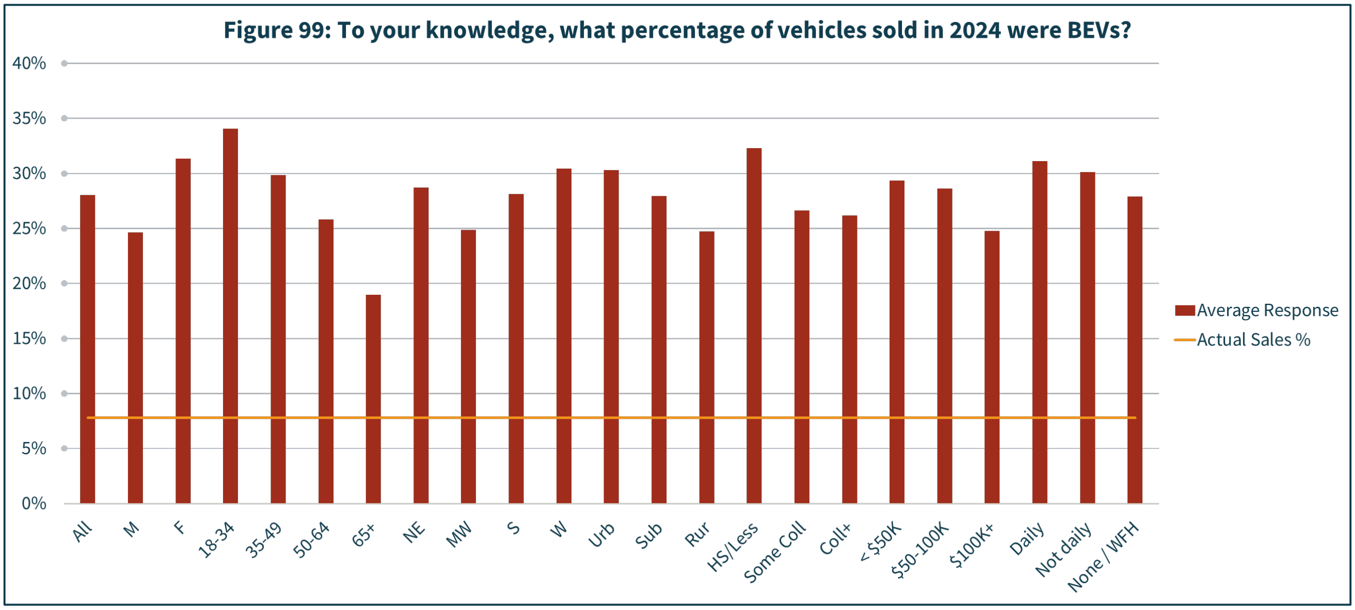


Figure 99: To your knowledge, what percentage of vehicles sold in 2024 were BEVs?
40%
35%
30%
25%
20%
15%
10%
5%
0%
All
M
F
18-34
35-49
50-64
65+
NE
MW
S
W
Urb
Sub
Rur
HS/Less
Some Coll
Coll+
< $50K
$50-100K
$100K+
Daily
Not daily
None / WFH
Average Response
Actual Sales %


41% of consumers believe finding a place to charge an electric vehicle away from home would be easy.

Figure 100: How often do you see BEVs in the area where you live or work?

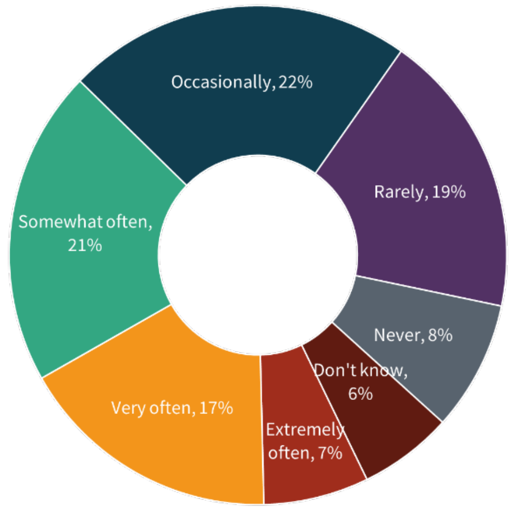


Figure 101: How often do you see BEVs in the area where you live or work?

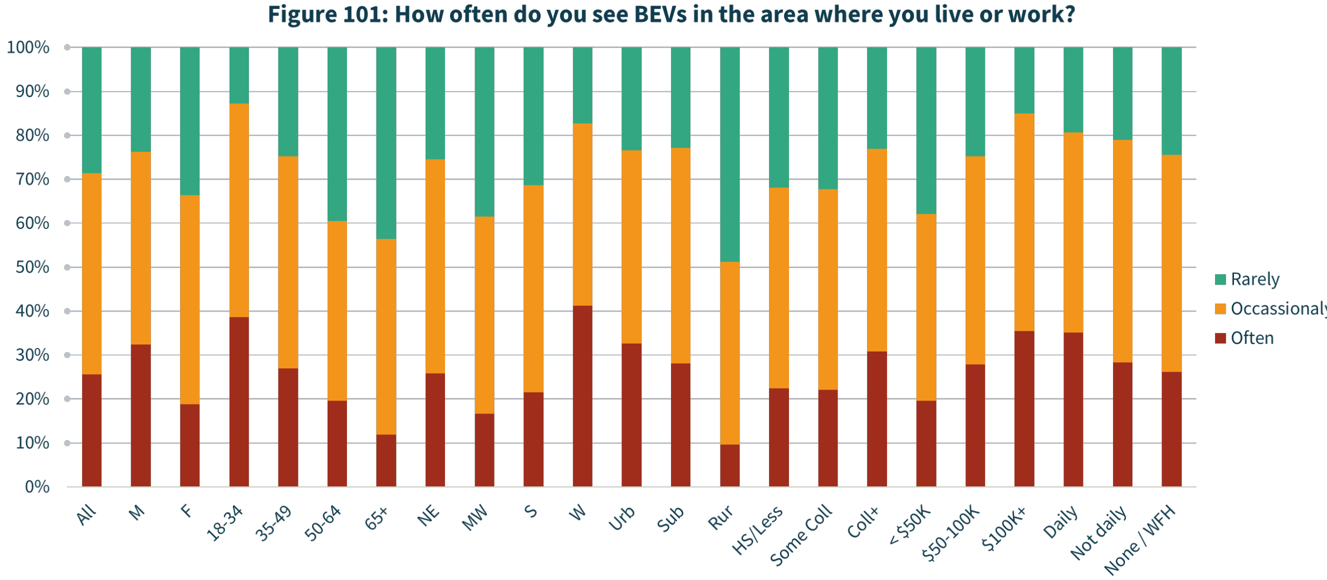


Figure 102: Do you have a suitable place to charge an EV at home?

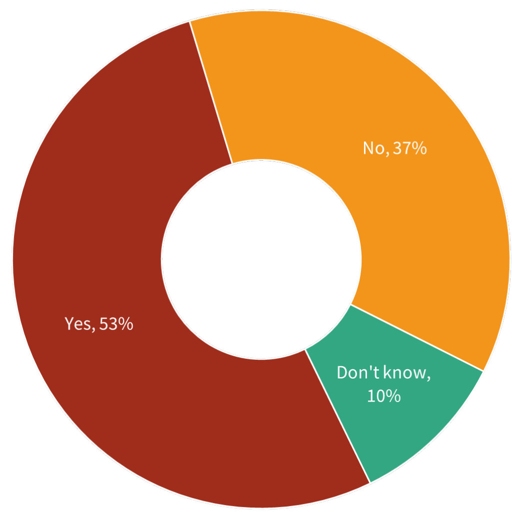


Figure 103: Do you have a suitable place to charge an EV at home?

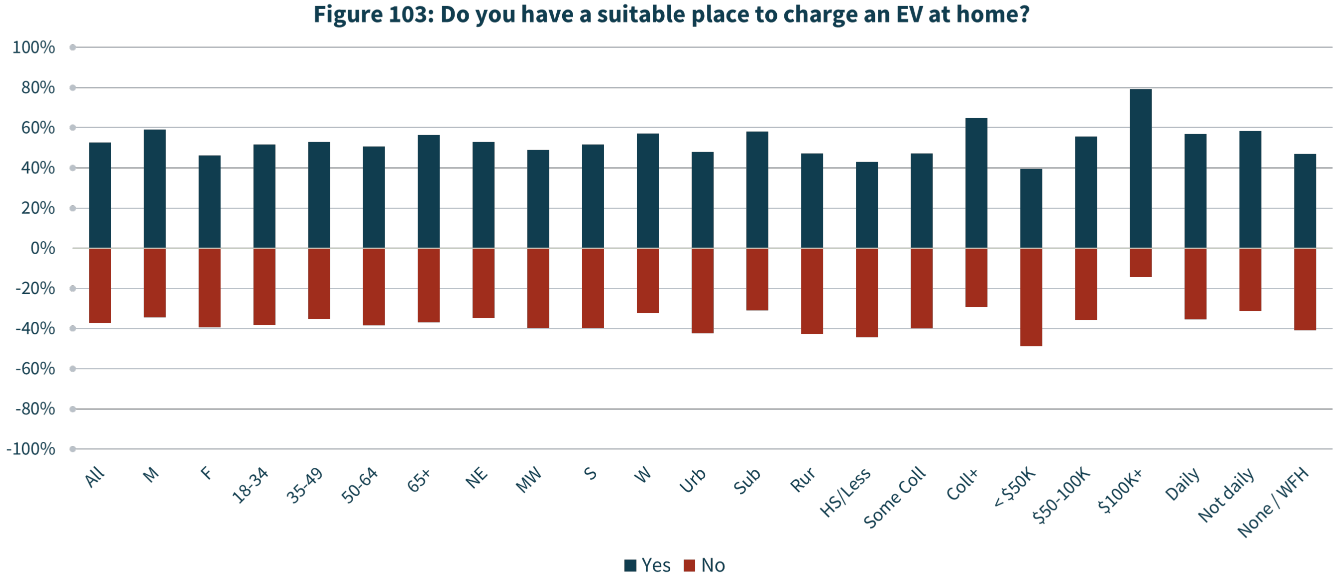


Figure 104: How easy would it be to find places to charge an EV in your community?

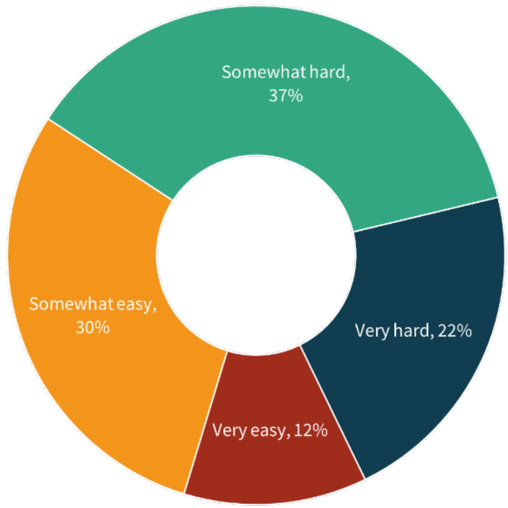


Figure 105: How easy would it be to find places to charge an EV in your community?

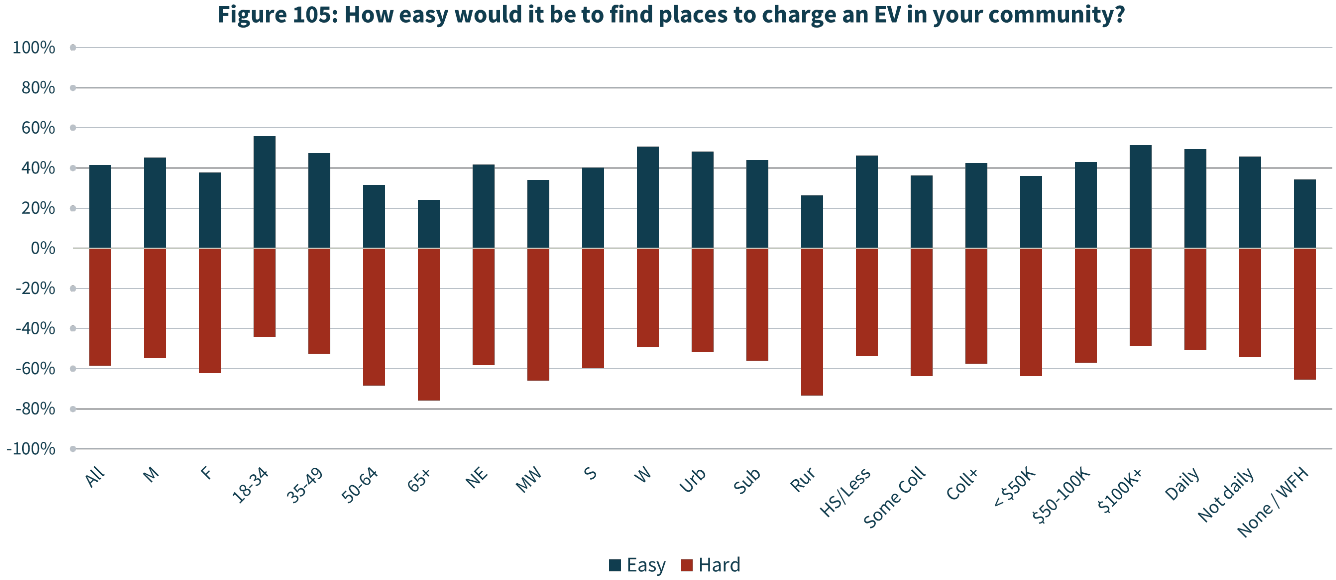
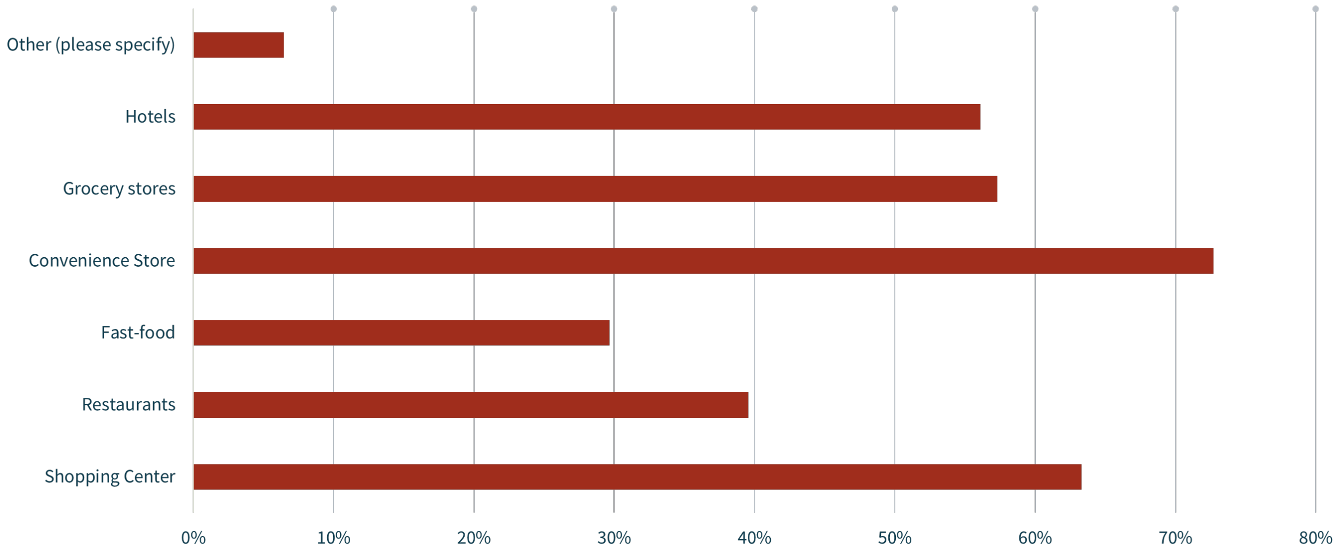


Figure 106: Where should EV chargers be located?



Appendix A

Demographic Characteristics of Survey Sample

Category	Options	% of Respondents
Gender	Male	49%
	Female	51%
Age	18 - 34	25%
	35 – 49	31%
	50 – 64	27%
	65 and older	16%
Region	Northeast	19%
	Midwest	21%
	South	38%
	West	22%
Community	Urban	30%
	Suburban	48%
	Rural	22%
How many people in household?	1	25%
	2	29%
	3	21%
	4	14%
	5	7%
	6 or more	4%
Do you have children under the age of 18 living at home?	Yes	33%
	No	67%
Do you own or rent your primary residence?	Own	50%
	Rent	45%
	Other	4%
Employment Status	Working full-time	43%
	Working part-time	13%
	Student	4%
	Retired	20%
	Unemployed/Not currently working	20%
Do you commute to work?	Commute every day	62%
	Commute few times per week	23%
	Commute less than once per week	3%
	Do not commute/work from home	13%

Category	Options	% of Respondents
Education	High school or less	28%
	Technical/vocational school	6%
	Some college	27%
	Graduated college	29%
	Post-graduate	9%
Household Income	Less than $20,000	17%
	$20,000 – $34,999	15%
	$35,000 - $49,999	11%
	$50,000 - $74,999	22%
	$75,000 - $99,999	12%
	$100,000 - $149,999	12%
	$150,000 or more	7%

Appendix B

Survey Questions Asked of Respondents

Responses to the following questions were extracted from the larger survey for this report.

Economic Sentiment and Gasoline Prices

Generally speaking, how do you feel about the economy?

1) Very pessimistic
2) Somewhat pessimistic
3) Somewhat optimistic
4) Very optimistic

How much do gas prices today impact your feelings on the economy? They have…

1) Great impact
2) Some impact
3) Little impact
4) No impact

How much does the price of gas impact your driving decisions? Does it have a…

1) Great impact
2) Some impact
3) Little impact
4) No impact

Compared to last year, would you say the amount you drive has changed?

1) Yes – I drive much more
2) Yes – I drive somewhat more
3) Yes – I drive somewhat less
4) Yes – I drive much less
5) No – the amount I drive has not changed

If drive more, which of the following reasons relate to why you drive more than you did last year? Please select all that apply.

1) I have more jobs / multiple jobs
2) I have more errands / responsibilities
3) I am engaged in more social or family activities outside my home
4) I use public transportation less than before
5) Other (Please specify)

If drive less, which of the following reasons relate to why you drive less than you did last year? Please select all that apply.

1) The price of gas
2) I work from home and commute less
3) I retired or am no longer employed
4) I have fewer errands
5) I engage in fewer social activities outside my home
6) I use public transportation more than before
7) Other (Please specify)

Gas Purchasing Behavior and Price Sensitivity

Which of the following best describes how often you buy gas for a vehicle, such as a car, truck, or van?

1) Once a day
2) At least once a week
3) A few times a month
4) At least once a month
5) A few times a year
6) Once a year
7) Never
8) Don't know

Generally speaking, at what time of the day do you most often purchase gas?

1) Morning, or roughly 6am to 10am
2) Mid-day, or roughly 10am to 3pm
3) Afternoon, or roughly 3pm to 7pm
4) Night, or roughly 7pm to midnight
5) Overnight, or roughly midnight to 6am

Which method do you typically use to purchase gas?

1) Credit
2) Debit
3) Cash
4) Other (e.g. mobile app, gift card, etc.)

Where do you most often buy gas?

1) At a convenience store that sells gas
2) At a service station that has a very limited store or no store for snacks/drinks
3) From a big-box retailer like Costco or Walmart that sells fuel

When buying gas, which of the following factors is **most** important to you?

1) Price
2) Location
3) Brand

Generally speaking, do you have a preference for a certain gas station or chain?

1) Yes
2) No

If yes, why do you prefer that gas station or chain?

1) It usually has lower prices
2) Location of a particular store
3) Quality of fuel
4) Type of fuel (Ethanol, E15, etc.)
5) Loyalty program with chain/store
6) Quality of prepared food/drinks
7) Quality of store employees
8) Restrooms / cleanliness
9) Other (Please specify)
10) Don't know

If a convenience store near you could do one thing to get more of your business, what would it be?

1) Lower gas price
2) Lower price of in-store items
3) High-quality prepared foods options
4) Improved customer service / employees
5) Something else (please specify)

How strongly do you agree or disagree with the following statements?

a) Strongly agree
b) Somewhat agree
c) Somewhat disagree
d) Strongly disagree

    1) I would take a left hand turn across a busy street to save 5 cents per gallon on gas
    2) I would drive 5 minutes out of my way to save 5 cents per gallon on gas
    3) I would drive 10 minutes out of my way to save 5 cents per gallon on gas

Alternative Fuel – E15

Thinking about times you purchased gas in the past year, have you been presented with the option to purchase E15 (a gasoline blend containing up to 15% ethanol)?

1) Yes
2) No
3) Don’t know / not sure

If yes, thinking about times you purchased gas in the past year, have you ever purchased E15 (a gasoline blend containing up to 15% ethanol) instead of regular gasoline (which contains up to 10% ethanol)?

1) Yes
2) No
3) Don’t know / not sure

If yes, for which of the following reasons did you choose to purchase E15 instead of regular gasoline? Please select all that apply.

1) E15 was priced lower than regular gasoline
2) E15 has a higher octane (88) rating that regular gasoline (87)
3) I believe E15 is better for the environment
4) I believe E15 supports American famers
5) Other (Please specify)

Driving Behavior

How often do you drive a vehicle such as a car, truck, or van?

1) Once a day
2) At least once a week
3) A few times a month
4) At least once a month
5) A few times a year
6) Once a year
7) Never
8) Don't know

Vehicle Ownership

How many vehicles (i.e., cars, trucks, vans, etc.) do you have at home?

1) None
2) 1
3) 2
4) 3
5) 4
6) 5
7) 6 or more
8) Don't know / not sure

Powertrain of Vehicles

Do you or anyone in your household have any of the following types of vehicles at home?

1) A gasoline powered vehicle
2) A hybrid vehicle
3) A plug-in electric hybrid vehicle
4) An all-electric vehicle
5) A diesel fuel vehicle

Thinking about the vehicle you most commonly drive, how is it powered?

1) A gasoline powered vehicle
2) A hybrid vehicle
3) A plug-in electric hybrid vehicle
4) An all-electric vehicle
5) A diesel fuel vehicle
6) Something else (Please specify)
7) Don't know / not sure

Which of the following best describes the vehicle you most commonly drive?

1) Car
2) Pick-up truck
3) Van
4) Minivan
5) SUV or crossover
6) Motorcycle
7) Something else (Please specify)

Future Vehicle Acquisition

For people in general, do you think that now is a good time or a bad time to buy or lease a new or used vehicle?

1) Now is a good time
2) Now is a bad time
3) Don't know / not sure

Over the next year, do you think that the average price of buying or leasing a vehicle (whether new or used) will…?

1) Increase
2) Decrease
3) Stay about the same
4) Don't know / not sure

Thinking about your household specifically, how likely are you to buy or lease a new or used vehicle in the next two years?

1) Very likely
2) Somewhat likely
3) Might or might not
4) Somewhat unlikely
5) Very unlikely

Interest in Powertrains

I would like to ask about different types of vehicles you might consider buying or leasing. For each, please indicate how likely you are to consider the following.

a) Very likely
b) Somewhat likely
c) Might or might not
d) Somewhat unlikely
e) Very unlikely

1) A gasoline powered vehicle
2) A hybrid electric vehicle
3) A flex fuel vehicle (i.e., capable of using E85 fuel)
4) An all-electric vehicle
5) A plug-in electric hybrid vehicle
6) A diesel fuel vehicle

Vehicle Attributes

Regardless of whether or not you intend to get a different vehicle in the next few years, we would like to ask your opinion on some attributes people often consider when getting a vehicle.

If you were to consider getting a different vehicle, how important would the following attribute be?

1) Fuel economy
2) Purchase price
3) Maintenance costs
4) Infotainment or connectivity
5) Passenger room
6) Vehicle comfort
7) Cargo space
8) Vehicle size
9) Horsepower
10) Reliability
11) Safety
12) Style

Which of the following attributes would be MOST IMPORTANT if you were to consider getting a different vehicle?

1) Fuel economy
2) Purchase price
3) Maintenance costs
4) Infotainment or connectivity
5) Passenger room
6) Vehicle comfort
7) Cargo space
8) Vehicle size
9) Horsepower
10) Reliability
11) Safety
12) Style

Attitudes Towards Alternatives

Please indicate your current attitude towards the following:

a) Very positive
b) Somewhat positive
c) Neither positive nor negative
d) Somewhat negative
e) Very negative

1) Electric Vehicles (EVs)
2) Autonomous (self-driving) Vehicles
3) Rideshare / on-demand services such as Uber or Lyft

How – if at all – has your view changed towards the following in the past year?

a) Much more positive
b) Somewhat more positive
c) Unchanged
d) Somewhat more negative
e) Much more negative

1) Electric Vehicles (EVs)
2) Autonomous (self-driving) Vehicles
3) Rideshare / on-demand services such as Uber or Lyft

In your own words, why do you say you have a "very positive" attitude towards Electric Vehicles (EVs)?

In your own words, why do you say you have a "very negative" attitude towards Electric Vehicles (EVs)?

Consumers and Electric Vehicles

To the best of your knowledge, what percentage of vehicles sold last year (in 2024) were Electric Vehicles?

To the best of your knowledge, how often do you see Electric Vehicles (EVs) being driven or charged in the area where you live or work?

1) Extremely often
2) Very often
3) Somewhat often
4) Occasionally
5) Rarely
6) Never
7) Don’t know / not sure

In your opinion, where should EV chargers be located? Please select all that apply.

1) Shopping malls / strip malls
2) Sit-down restaurants
3) Fast-food restaurants
4) Convenience stores/gas stations
5) Grocery stores
6) Hotels
7) Other (please specify)

Thinking about your community, how easy or difficult do you think it would be to find places where you could charge an Electric Vehicle (EV)?

1) Very easy
2) Somewhat easy
3) Somewhat hard
4) Very hard

Thinking specifically about where you live, do you have a garage, driveway, parking spot, or other suitable location where you might be able to charge an Electric Vehicle (EV) at home?

1) Yes
2) No
3) Don’t know / not sure

About the Transportation Energy Institute

The Transportation Energy Institute, founded by NACS in 2013, is a 501(c)(4) nonprofit research-oriented think tank dedicated to evaluating the market issues related to vehicles and the fuels that power them. By bringing together diverse stakeholders of the transportation and fuels markets, the Institute helps to identify opportunities and challenges associated with new technologies and to facilitate industry coordination to help ensure that consumers derive the greatest benefit.

The Transportation Energy Institute commissions and publishes comprehensive, fact-based research projects that address the interests of the affected stakeholders. Such publications will help to inform both business owners considering long-term investment decisions and policymakers considering legislation and regulations affecting the market. Research is independent and unbiased, designed to answer questions, not advocate a specific outcome. Participants in the Transportation Energy Institute are dedicated to promoting facts and providing decision makers with the most credible information possible so that the market can deliver the best in vehicle and fueling options to the consumer.

For more about the Transportation Energy Institute visit transportationenergy.org

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