

REV UP

ELECTRIC VEHICLES

The first-ever multi-state study of the electric vehicle shopping experience.



SIERRA
CLUB

SIERRA CLUB EV INITIATIVE



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AGENDA

Purpose

Overview

Methodology

Key Findings

Recommendations

Q & A

PURPOSE

Asses what's working well and what can be improved in the EV marketplace

“I couldn't do a test drive because the key was lost. I was encouraged to purchase a non-electric vehicle instead.”

LOUISE A.,
NISSAN DEALERSHIP, CONNECTICUT

“EV salesman wasn't working that day, so I was told to come again.”

STEPHEN B.,
HYUNDAI DEALERSHIP, CALIFORNIA

“There were only two EVs on the lot, and neither were charged with sufficient power for a test drive.”

KEVIN K.,
MERCEDES DEALERSHIP, CALIFORNIA

“I called the dealership and was told that they weren't certified to sell EVs and that their sales department wasn't equipped to handle them.”

NANCY P.,
FORD DEALERSHIP, MAINE

“The website said they had EVs in stock but they had none on the lot when I arrived.”

ALLISON R.,
VOLVO DEALERSHIP, MASSACHUSETTS

“The salesperson admitted he did not know too much about EVs. He said he had not received EV training.”

EUGENE C.,
VOLKSWAGEN DEALERSHIP, CALIFORNIA

OVERVIEW

- April, May, June 2016
- 174 volunteers
- 308 dealerships
- 13 automakers
- 10 states

California
 Connecticut
 Oregon
 Massachusetts
 Maine

Maryland
 New Jersey
 New York
 Rhode Island
 Vermont

AUTOMAKER (some sell multiple EV models/brands)	TOTAL EV sales Jan-June, 2016	TOTAL Overall U.S. Car Model Sales	PERCENT EV sales of all U.S. Auto Sales
TESLA	19,030	19,030	100%
GENERAL MOTORS (Chevy, Cadillac)	12,803	1,438,915	0.84%
FORD	10,906	1,345,170	0.81%
BMW	6,214	153,436	4.05%
NISSAN	5,793	798,114	0.73%
VW AG (Audi, Volkswagen)	3,397	247,135	1.38%
FCA (Fiat, Chrysler)	2,220	1,152,259	0.19%
HYUNDAI	1,360	374,060	0.36%
PORSCHE	1,322	26,708	4.95%
VOLVO	1,006	36,653	2.75%
DAIMLER AG (Mercedes, Smart)	740	181,132	0.41%
KIA	613	328,327	0.19%
TOYOTA	42	1,197,800	0.00%
MITSUBISHI	20	51,934	0.04%
HONDA	0	792,355	0%
JAGUAR, LAND ROVER	0	47,639	0%
SUBARU	0	279,458	0%
MAZDA	0	145,354	0%

METHODOLOGY



- Email, phone and social media outreach
- Web-tool designed by Sierra Club & housed on website
- Volunteers watched short video presentation
- Dealerships were removed when surveyed

92103

Priority auto dealerships closest to you:

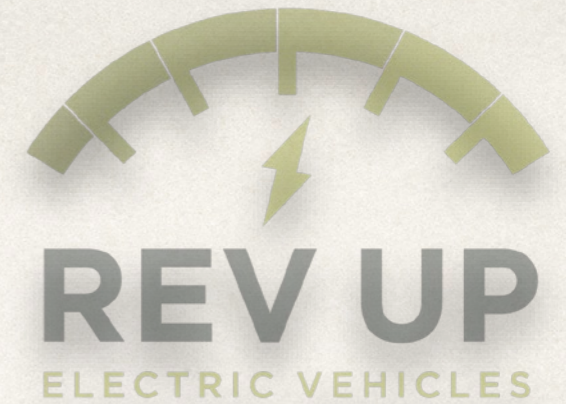
Click on the dealership you want to visit.

- Mercedes-Benz of San Diego**
4750 Kearny Mesa Road
San Diego, CA 92111
858-279-7202
Type: Mercedes-Benz
- Kearny Pearson Kia**
7303 Clairemont Mesa Boulevard
San Diego, CA 92111
858-560-5544
Type: Kia
- Volvo San Diego**
5350 Kearny Mesa Road
San Diego, CA 92111
858-279-9700
Type: Volvo

A Google Map of the San Diego area with three red pins indicating dealership locations. The map shows major highways like I-5, I-8, I-15, and SR-52, and labels for areas like Mira Mesa, La Jolla, Pacific Beach, San Diego, Coronado, Chula Vista, El Cajon, and La Mesa. The Google logo and map data information are visible at the bottom of the map.

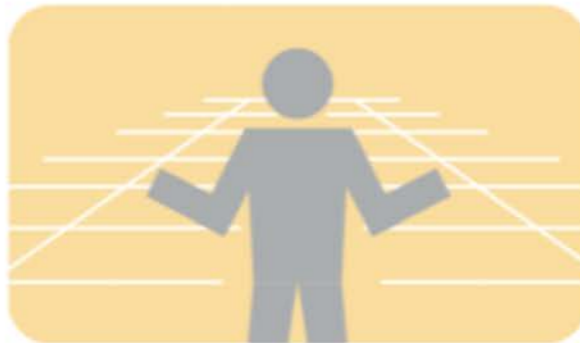
METHODOLOGY

Volunteers were asked to observe the following:

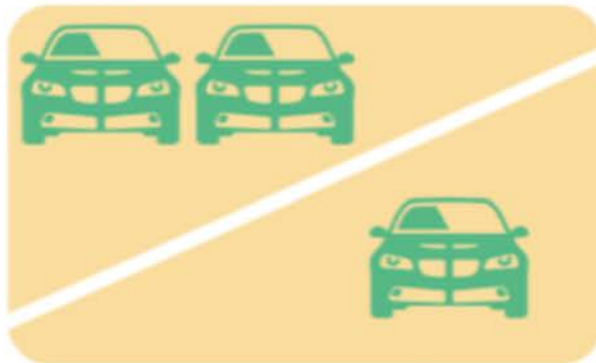


1. Availability
2. Charged batteries
3. Visibility
4. Salespeople enthusiasm
5. Salespeople knowledge of EV tech/charging
6. Salespeople knowledge of credits/incentives

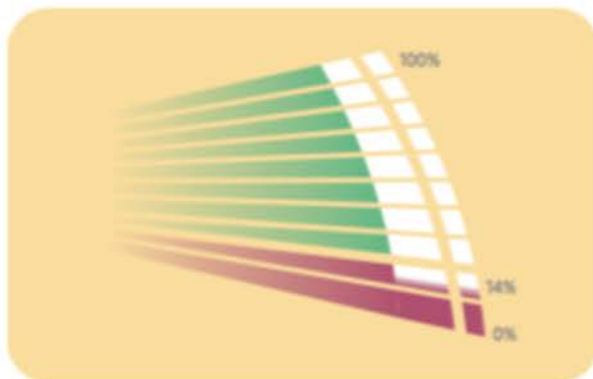
KEY FINDINGS



Our volunteers were **2 1/2 times** more likely to find no EV on a dealership lot in the nine other ZEV states than they were in California.

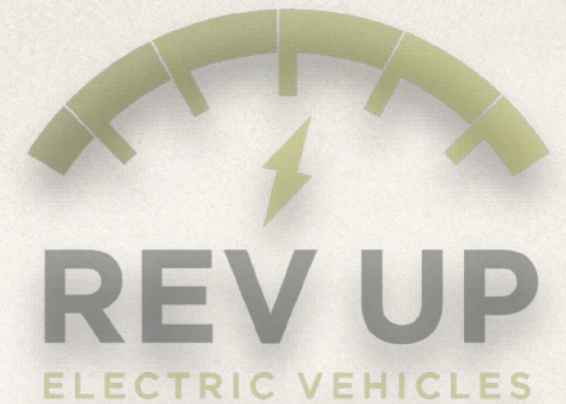


Among the dealerships our volunteers visited that had at least one EV, **the average number of EVs on lots in California was nearly twice the average** number on lots in the nine other ZEV states.



Of our respondents who asked to test drive an EV, **they were told at 14% of the dealerships that the car was not sufficiently charged**, including at **22%** of the Chevy dealerships and at **21%** of the Ford dealerships visited.

KEY FINDINGS



Of the visits to dealerships with at least one EV on the lot, volunteers indicated that only **about 50% of the salespeople they spoke with provided information on how to fuel the EV while traveling.**



Of the visits to dealerships with at least one EV on the lot, volunteers found that **42% of the time EVs were either “not prominently displayed” or were only “somewhat prominently displayed.”**



Of the visits to dealerships with at least one EV on the lot, volunteers indicated that **about 33% of the time the salesperson did not discuss the federal and state tax credits and rebates** available to lower the cost of an EV.

KEY FINDINGS

Knowledge of rebates/tax credits



Averages based on five-point scale, where 1 = poor and 5 = very knowledgeable

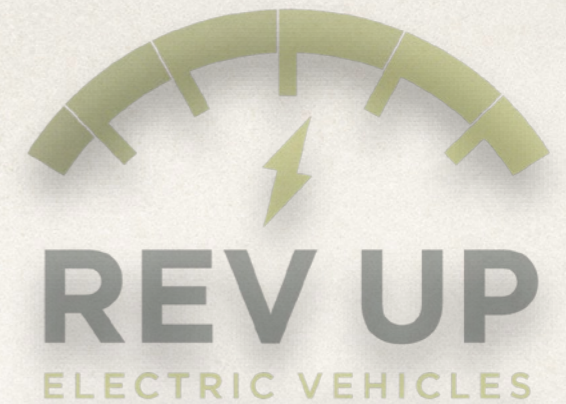
FULL SPEED AHEAD	4-5	Tesla, Fiat
GOING SLOWLY	3-3.9	Audi, BMW, Chevy, Ford, Mercedes, Nissan, Porsche, Volkswagen
BARELY MOVING	2-2.9	Volvo, Hyundai, Kia

FULL SPEED AHEAD	4 - 5	Oregon
GOING SLOWLY	3 - 3.9	California, Connecticut, Massachusetts, Maryland, New York
BARELY MOVING	2 - 2.9	Maine, New Jersey, Vermont

*among dealerships/stores with at least one EV on the lot.

KEY FINDINGS

Prominent display of plug-in models



Averages based on percentage of “yes” responses

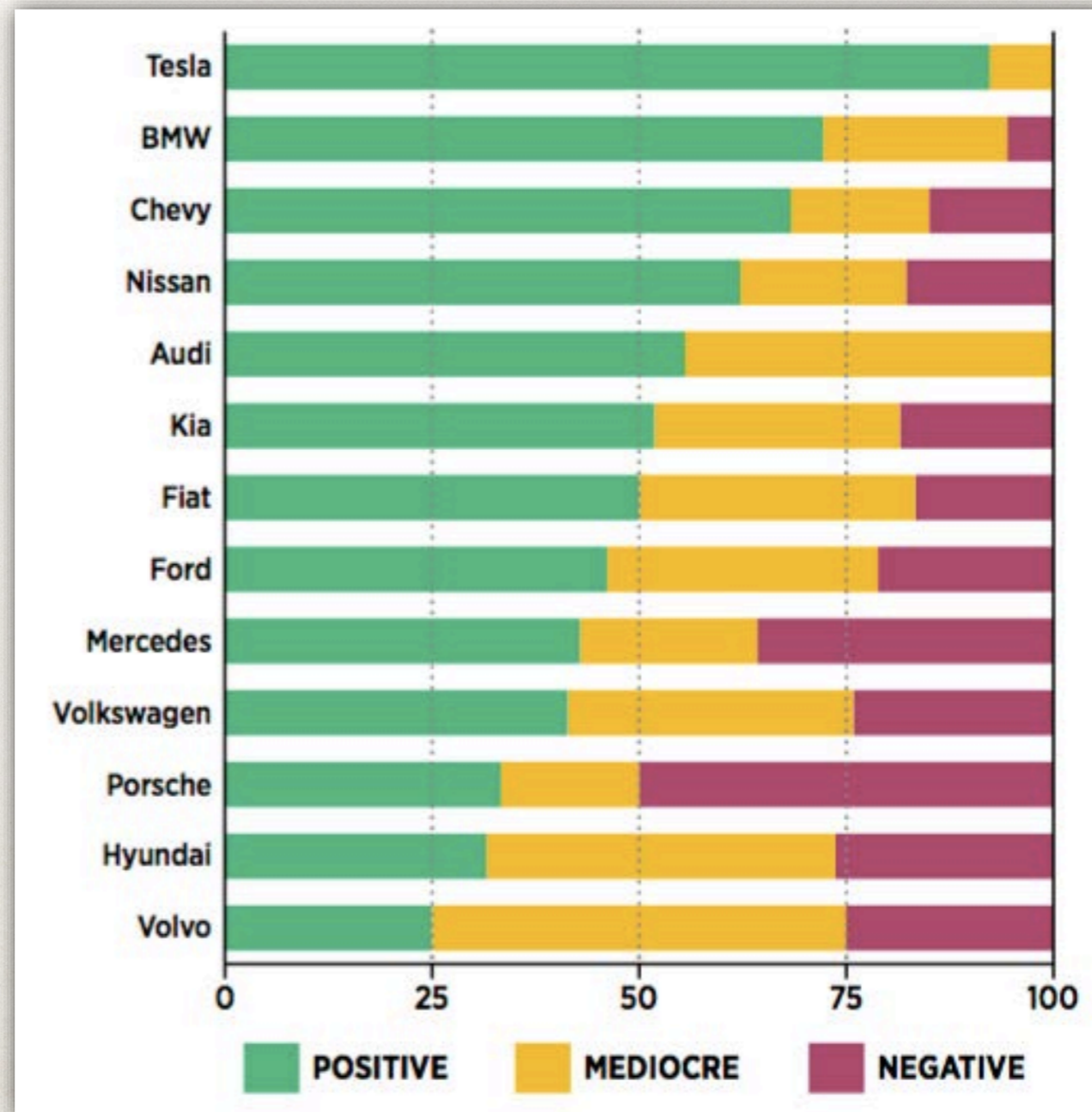
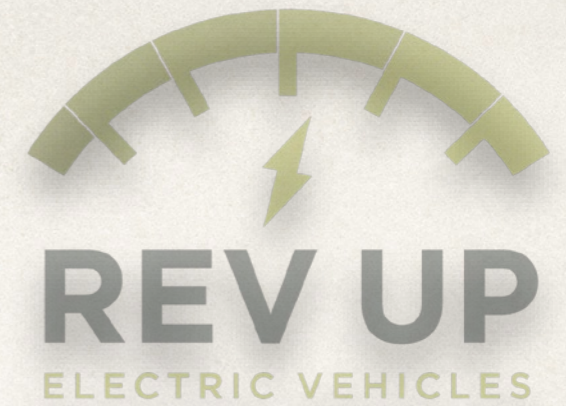
FULL SPEED AHEAD	80-100%	Tesla
GOING SLOWLY	40-79%	Audi, BMW, Chevy, Fiat, Ford, Kia, Nissan, Porsche, Volkswagen, Volvo
BARELY MOVING	<40%	Hyundai, Mercedes

FULL SPEED AHEAD	80-100%	None
GOING SLOWLY	40-79%	California, Connecticut, Maryland, Massachusetts, New York, Oregon, Vermont
BARELY MOVING	<40%	New Jersey

*among dealerships/stores with at least one EV on the lot.

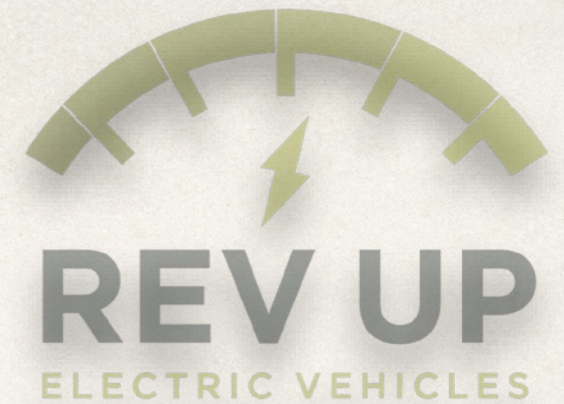
KEY FINDINGS

Overall EV Shopping Experience



RECOMMENDATIONS

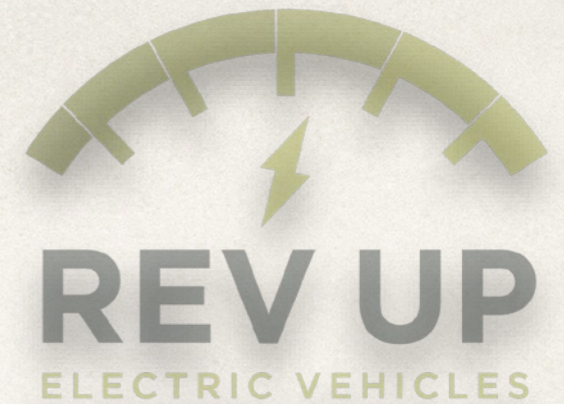
For *government agencies...*



- **Create and expand consumer incentives**, such as purchase/lease rebates, to keep EVs within grasp of middle-class Americans. Additional incentives should be provided to low-income residents.
- **Provide grants and incentives** for businesses, municipalities, and government agencies to invest in EV fleets and charging infrastructure.
- **Educate the public** about EVs and EV incentives.
- **Work with dealer groups** on salesperson training programs.

RECOMMENDATIONS

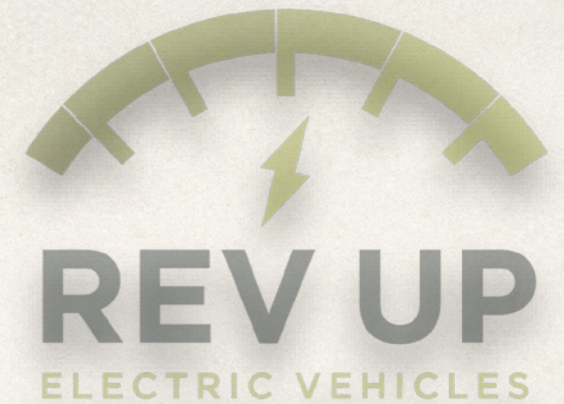
For *auto dealers* ...



- **Secure more EV inventory** from their affiliated automakers.
- **Provide regular trainings to salespeople** on EVs, charging technology, federal and state rebates and incentives, tax credits, and sales strategies.
- **Seek out EV certification** for their dealership and salespeople with one or more designated as EV Specialists.
- **Display EVs prominently**, such as under special canopies, in the showroom and along charging stations.
- **Recognize and reward** high-performing EV salespeople.
- **Work with local pro-EV groups** to participate in test-drive events.

RECOMMENDATIONS

For *automakers* ...



- **Increase EV inventory** for more dealerships in more states.
- Provide dealers with current and **detailed info on federal and state rebates and incentives, tax credits, and utility discounts.**
- Streamline the process and **lower or remove the costs of EV certification** for dealerships and their salespeople.
- Significantly **increase national EV marketing** and advertising.
- Recognize and **reward high-performing EV dealerships.**



Questions?

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