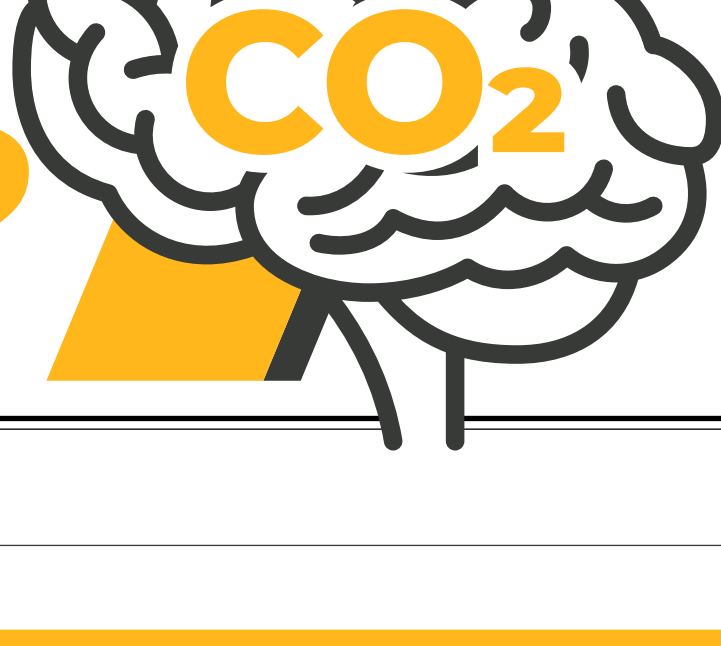


# Eyes On: Greener Roads

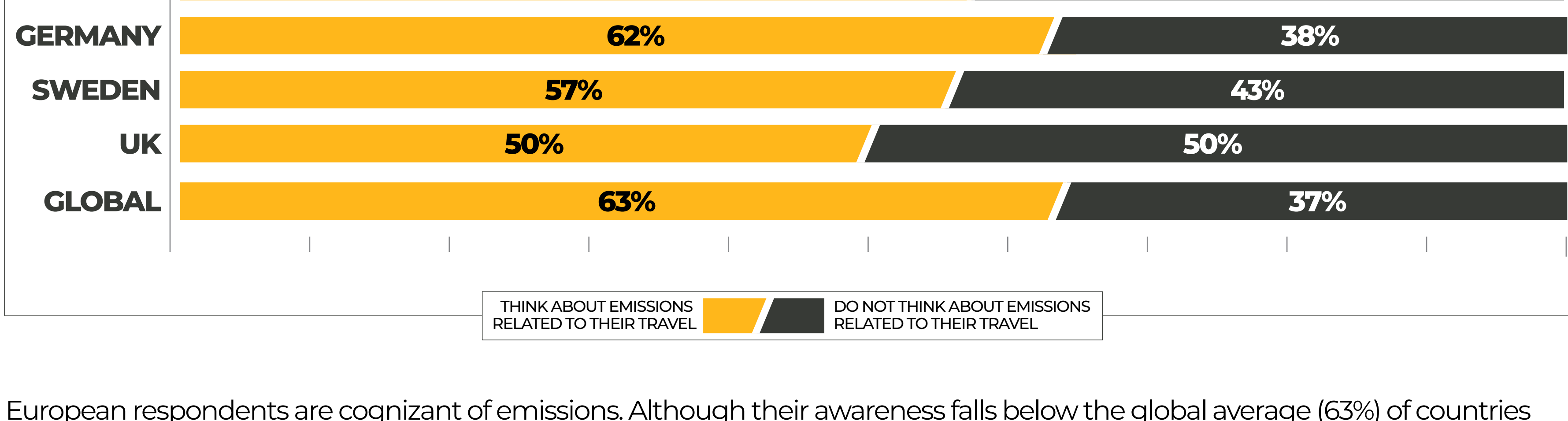
European Edition

CONSUMERS IN FRANCE, GERMANY, SWEDEN AND THE UNITED KINGDOM ARE MINDFUL OF THEIR EMISSIONS AND ARE INTERESTED IN BUYING AFFORDABLE ELECTRIC VEHICLES (EVs) TO ENABLE CLEANER, GREENER ROADS.

## CONCERNED ABOUT CARBON EMISSIONS?



WHEN ASKED IF THEY CONSIDERED EMISSIONS RELATED TO THEIR BUSINESS OR PERSONAL TRAVEL, RESPONDENTS REPLIED:

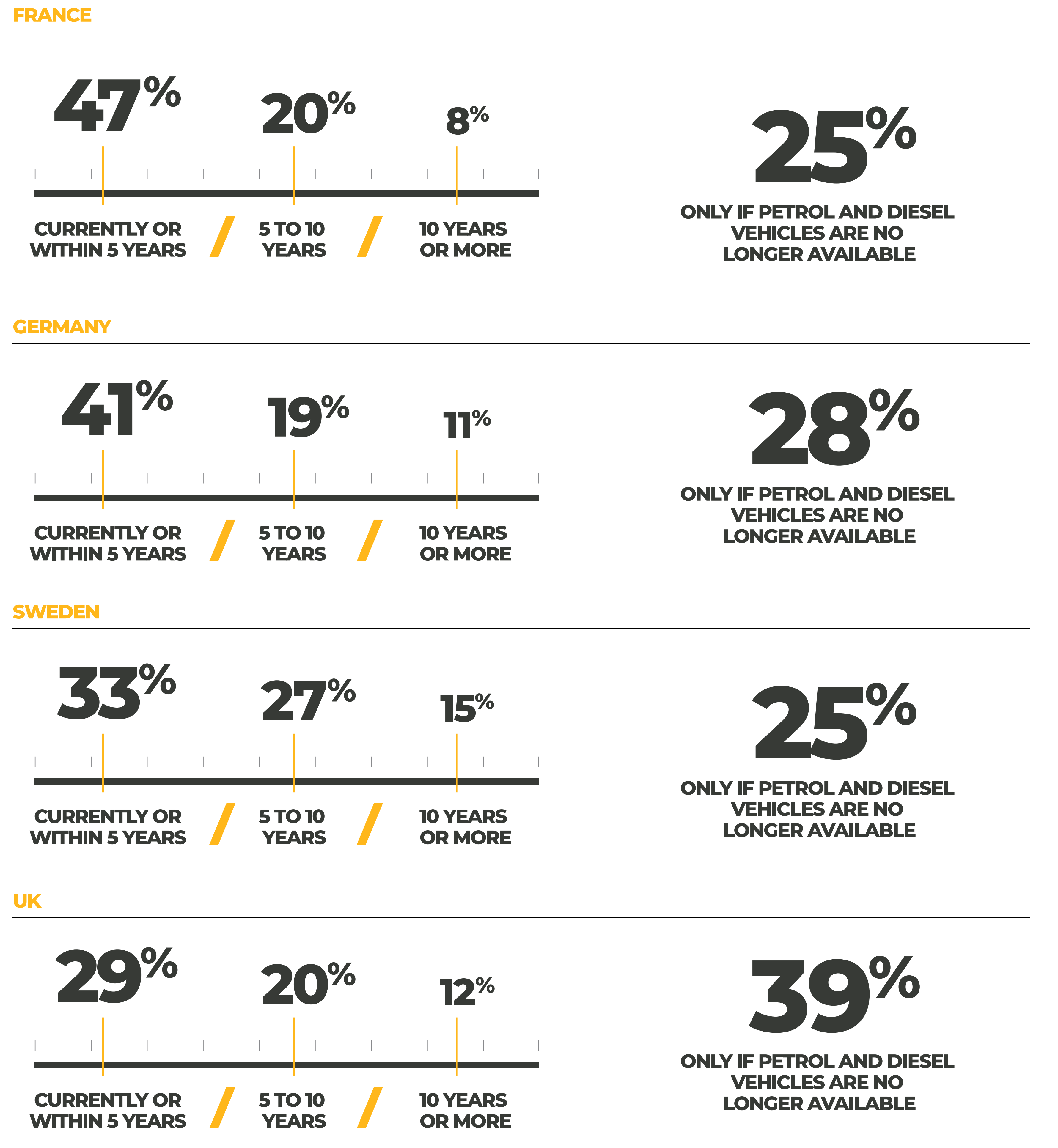


European respondents are cognizant of emissions. Although their awareness falls below the global average (63%) of countries surveyed, it is markedly higher than the U.S., where only 39% of respondents express concern about emissions.

## GOING GREEN A TIMELINE



WHEN ASKED WHEN THEY WOULD CONSIDER BUYING AN EV, RESPONDENTS REPLIED:

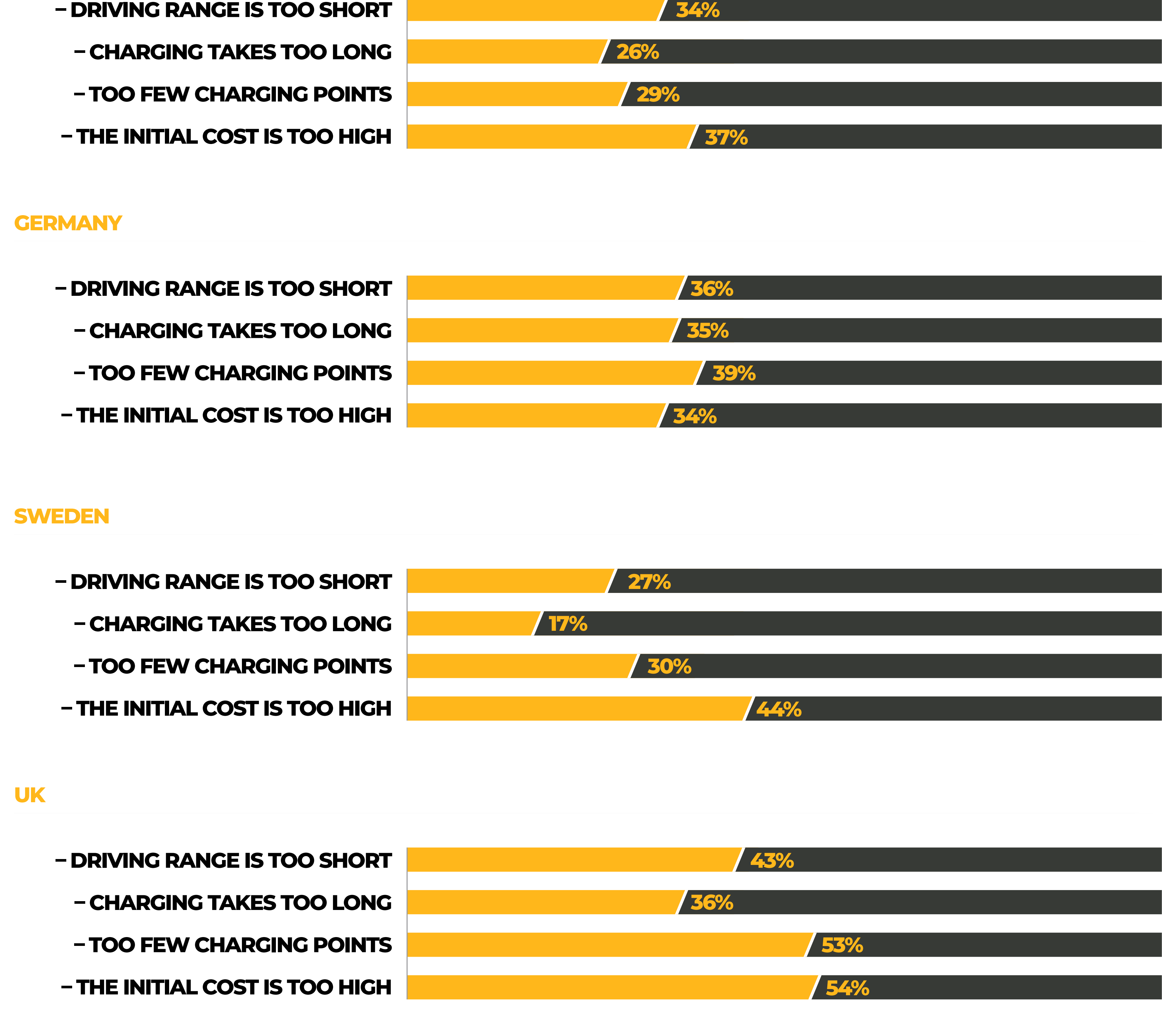


For those who don't already own an electric vehicle, more than half of respondents from France (59%), Germany (55%) and Sweden (54%) expect to own an EV within the next decade. Less than one-third of respondents in those regions will only purchase if petrol and diesel vehicles become unavailable. Those in the U.K. are slightly less likely (44%) to purchase in the next decade and more likely (39%) to only purchase if traditionally-powered cars become unavailable.

## ROAD BLOCKS TO PURCHASING



WHEN ASKED WHICH CONCERNS WOULD PREVENT THEM FROM BUYING AN EV, RESPONDENTS COULD SELECT ALL THE REASONS THAT APPLIED.



Concerns over upfront costs and lack of charging points are holding back European consumers from purchasing EVs.

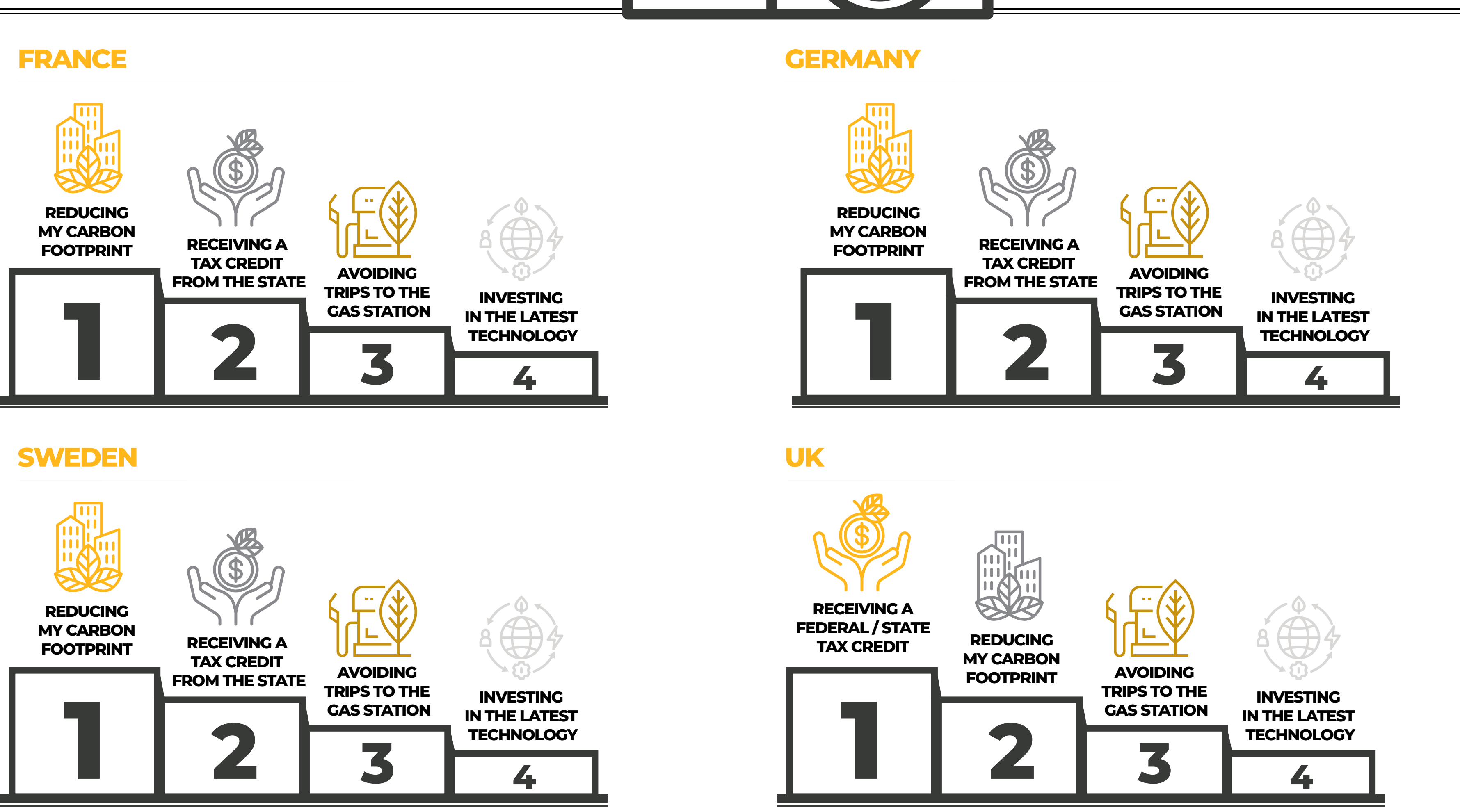
Across the board, Europeans' biggest concerns include: the initial cost of an EV, short driving ranges and charging (both EVs taking too long to charge and too few available charging points). Respondents in the U.K. are most concerned with the cost (54%).

Accessibility to EVs and qualified mechanics proved not to be significant barriers to purchase.

## INCENTIVES FOR CHANGE



WHEN ASKED TO RANK IN ORDER OF IMPORTANCE WHICH FACTORS WOULD MOST INFLUENCE THEIR DECISION TO PURCHASE AN EV, RESPONDENTS REPLIED:



The decision made by most French, German and Swedish consumers to purchase an EV by 2030 will likely be driven by their desire to reduce carbon emissions. Conversely, those surveyed in the U.K. will be more motivated to purchase an EV if the government offers a state tax credit. All regions ranked "avoiding trips to the petrol station" and "investing in the latest tech" as least important.

## IF THE PRICE IS RIGHT



WHEN ASKED IF THEY WOULD BUY AN EV AS THEIR NEXT VEHICLE IF IT COST AS MUCH AS A PETROL-POWERED VEHICLE, RESPONDENTS REPLIED:



The majority of those surveyed in France, Germany, Sweden and the U.K. would consider an EV as their next vehicle purchase if the price matched petrol-powered vehicles.

Across the four countries, Swedish respondents are most likely (70%) to purchase an EV if it were the same price. German respondents were least likely to be swayed by price, with 42% of respondents saying they would not purchase an EV or that price would not impact their decision to purchase.