

Understanding The EV Customer Journey

Looking at current and future possible interventions to drive mass adoption of EV's in Ireland



The main barriers to EV adoption are...



Upfront Costs



Range Anxiety



Status Quo Bias

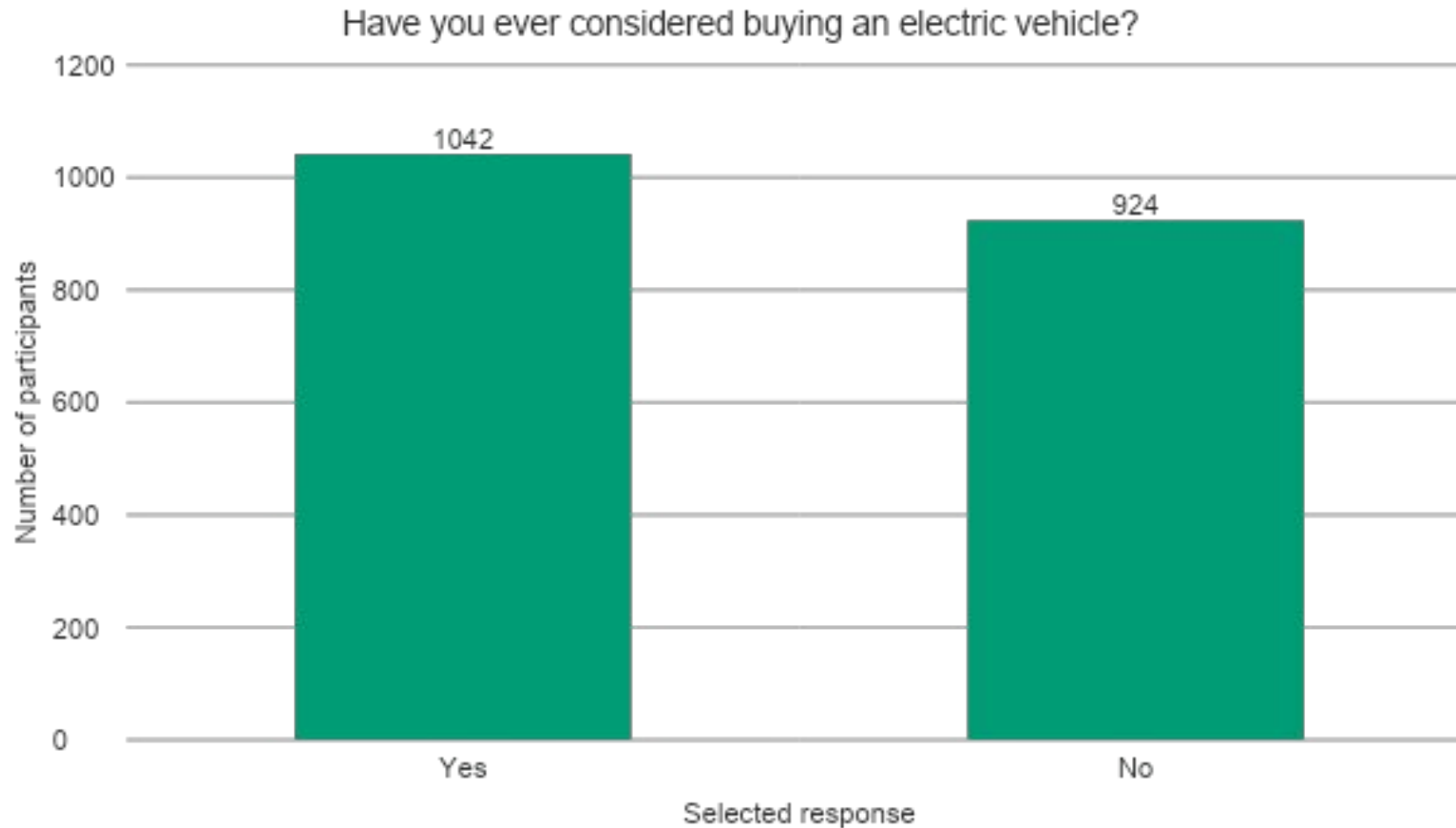
A typical customer journey for buying a car

Stage	Behaviours
Contemplation	Not in the market but forming opinions and daydreaming about new cars
Trigger	Motivation to start looking for a car now
Consideration	Online and word of mouth search
Choosing	Narrowing down options
Deciding	Visiting dealers, test driving
Deal Making	Negotiating
Driving	Choosing energy tariff, identifying charging strategies

Some insights

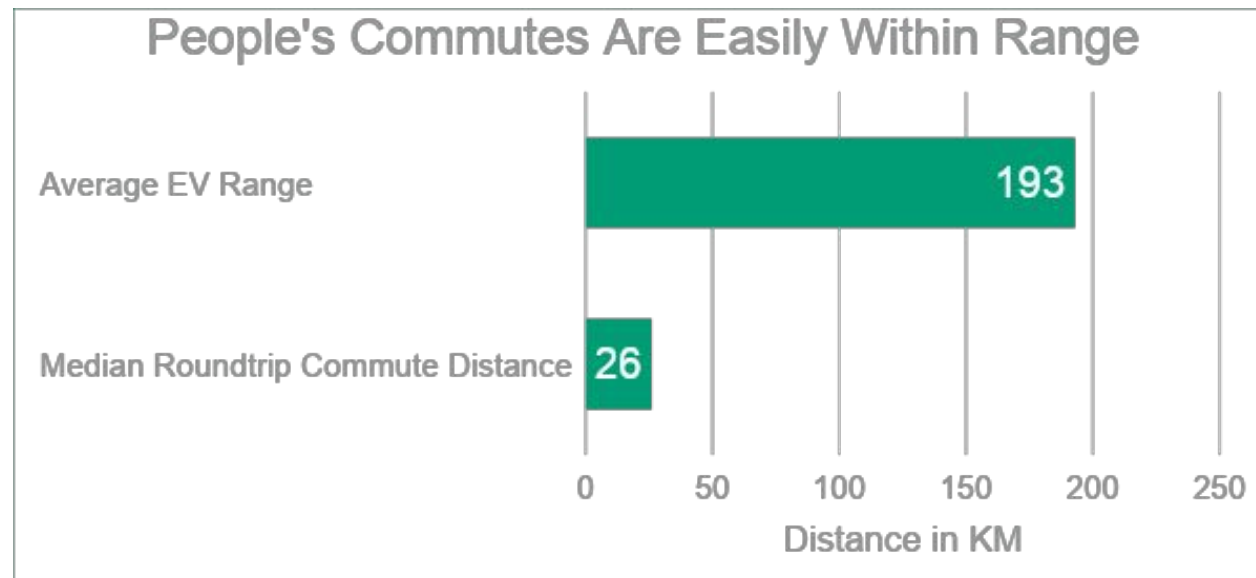


A sizable amount of people have considered purchasing an EV



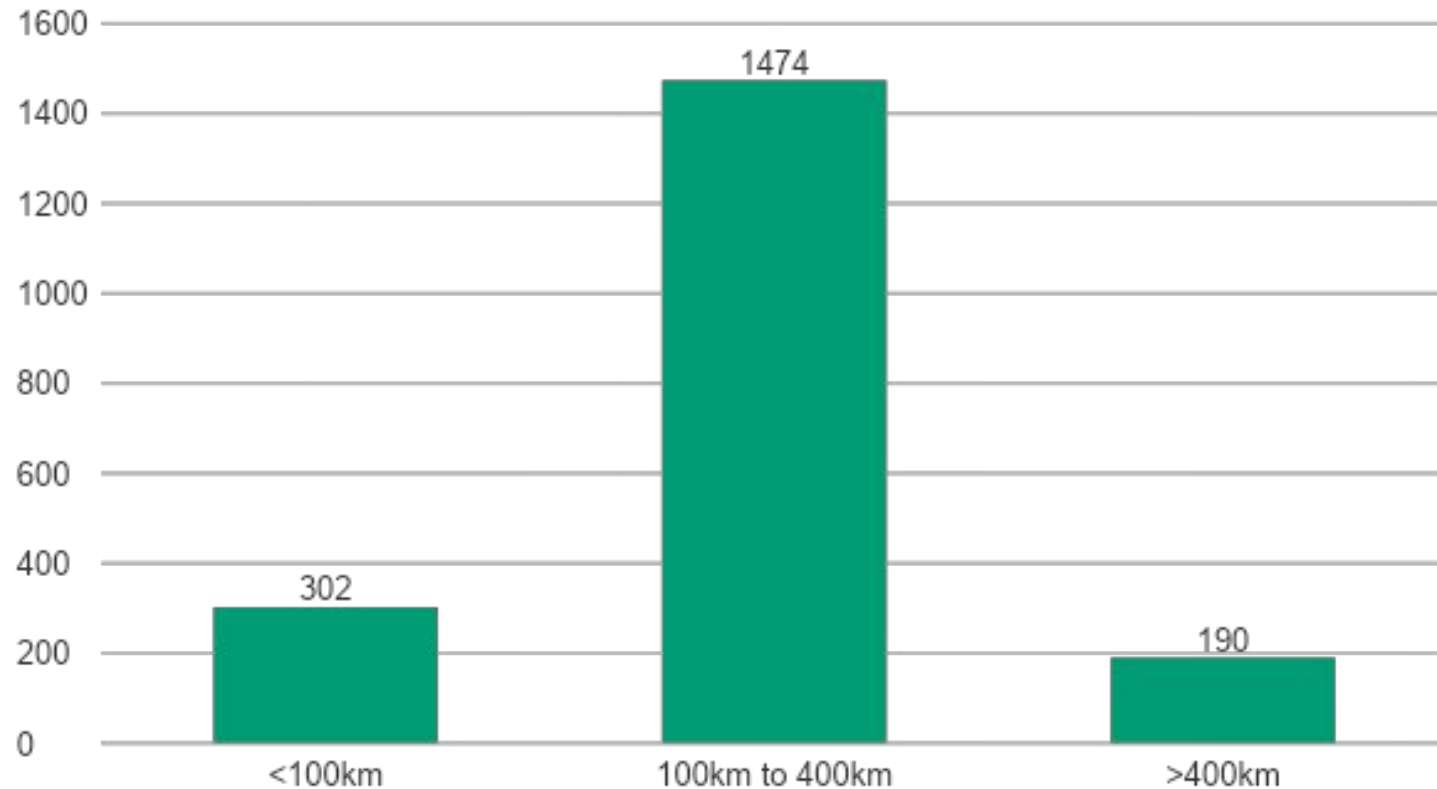
People's Roundtrip Commutes are Well Within the Range of Modern EV's

- We asked participants to enter their commute route on a map and saved their inputs



People have a good sense of how far EV's can drive

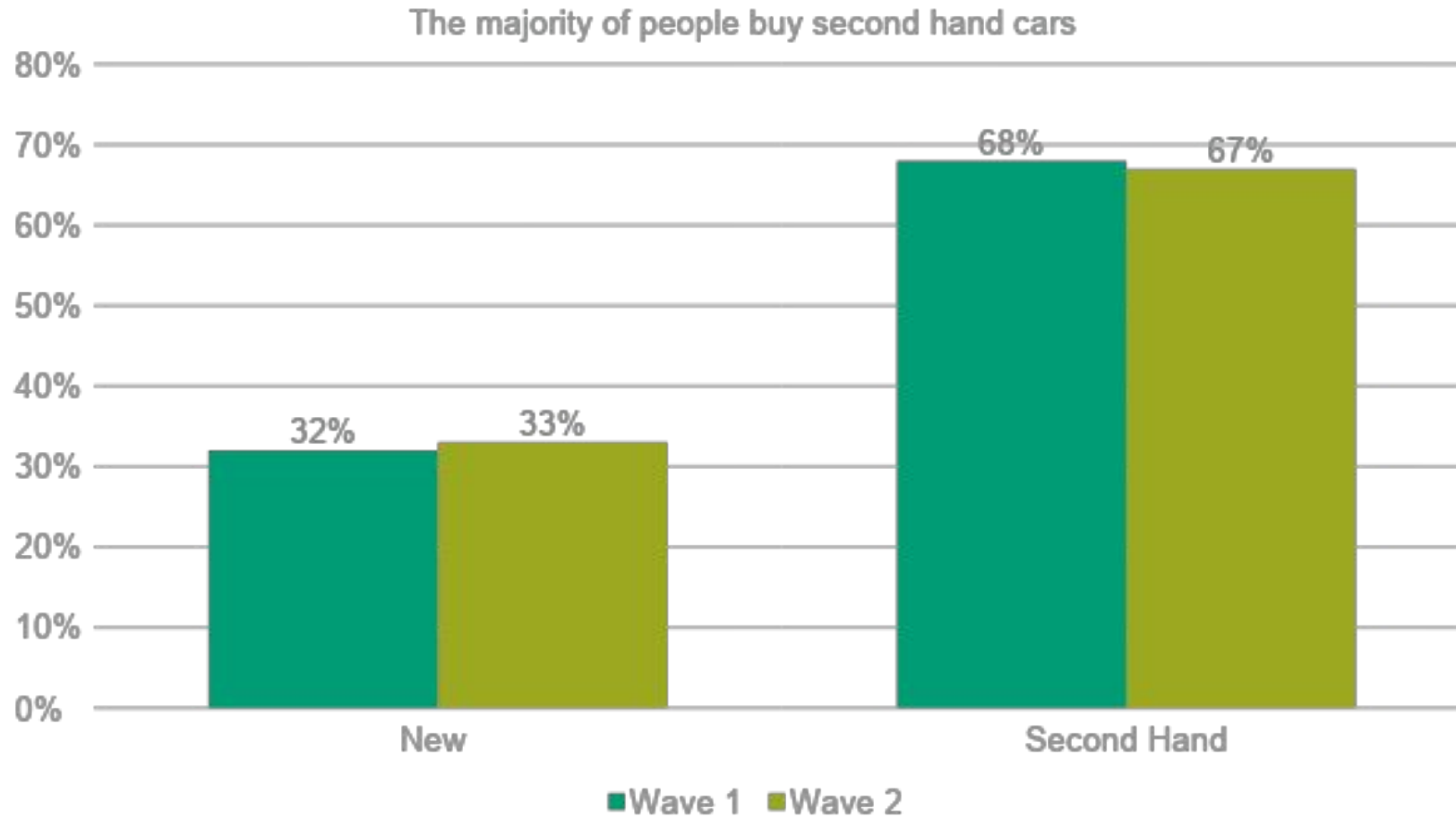
On average, what distance do you think an electric vehicle can travel before needing to be charged? Please give your answer in Kilometers (Km).



- Median guess is 200km
- Most frequent guess is 200km
- Real average is about 193km

But...

Most people buy second hand cars



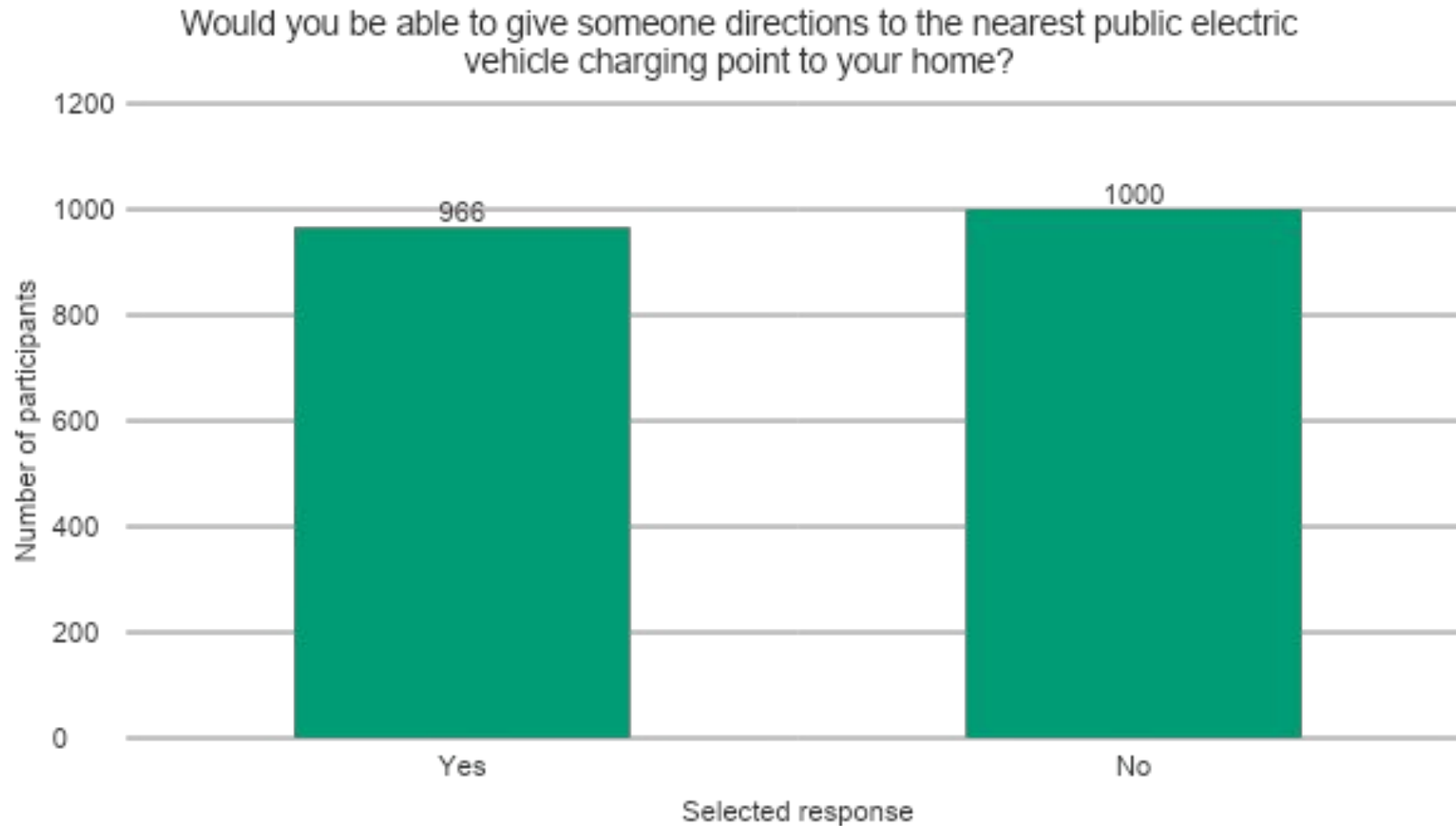
A lot of people don't believe EV range estimates

The range is an average so it is unreliable

Presuming the figures given are for daylight with no other power use beyond driving

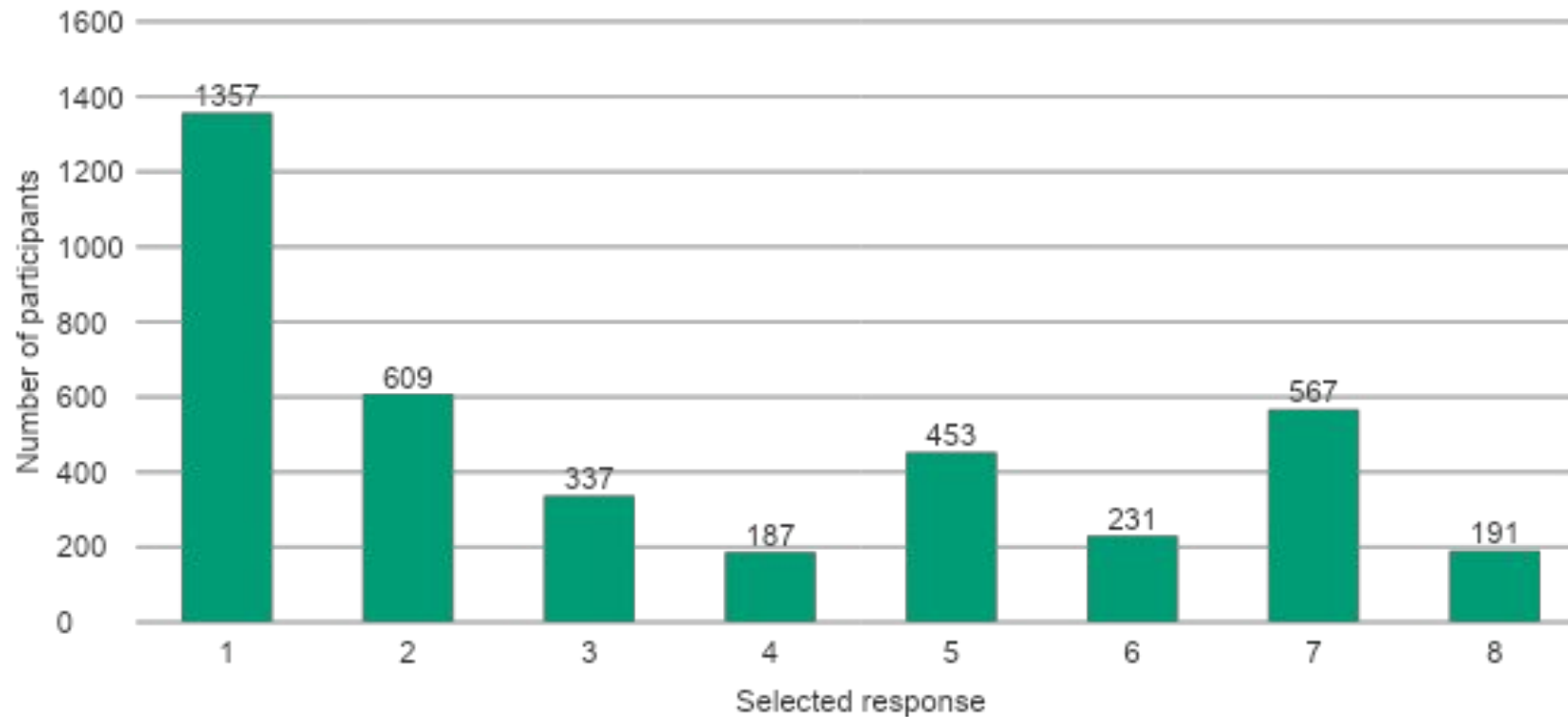
My concern with an EV is how good is the range when you have a family of four and their luggage to go on a holiday say from Kildare to Cork for a weekend,,hard to find that info out

A lot of people don't know where their nearest charger is...

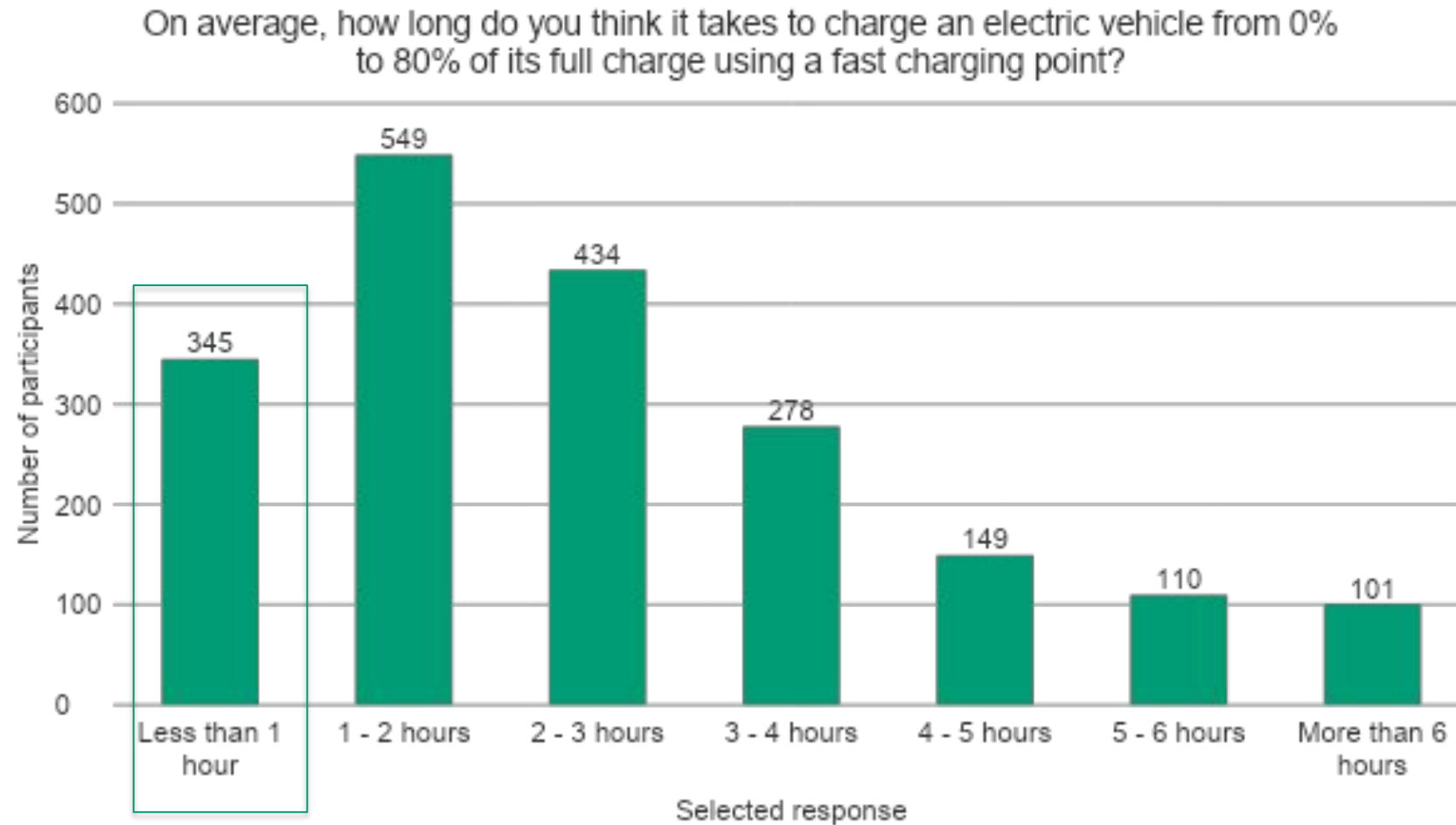


People in Dublin and Urban Areas find it harder to install home charging points

Do you have the ability to install an EV charging point at your home? This means that you have access to a fixed parking space, an electricity supply, and a method for metering your usage where the charging cable won't cause any hazards for others.



Most people over-estimate charging times



Potential Measures



Test Drive Initiatives

- Direct prior experience positively predicts investment likelihood and evaluation of key vehicle characteristics.
 - SEAI (2019), Schmalfuß et al (2017)
- Real world experience diminishes range anxiety
 - McKinsey & Company (2017), Rauh et al (2015)
- SEAI Energy Show – a successful precedent
- Roadshows
 - Plug'n Drive EV Roadshow - Ontario
 - Ride and Drive – New Zealand



Dealership Training & Awards

- Structured training can provide dealers with the expertise to advance EV sales by effectively communicating:
 - Running cost savings
 - Range capabilities
 - Grant availability
 - Tax incentives
- Certification and award systems can increase incentives to promote sales and improve corporate social responsibility status.



Comparison Tools & Total Cost of Ownership Labelling

- Increasing the salience of long terms costs can mitigate the impact of hyperbolic discounting.
- Maximise the key selling point of EVs
 - Lower running costs and maintenance costs



Thank you!

Shane
Prendergast



If you would like to run experiments with us to learn what works for increasing EV sales, please email:
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Electric vehicle customer journey

STAGE 1: CONTEMPLATION

Not actively looking for a new vehicle, but forming opinions



STAGE 2: INVESTIGATION

Gathering information and forming vehicle preferences



STAGE 3: DECISION

Finalising vehicle choice or deferring purchase

