



SELF-DRIVING CARS AND ELECTRIC VEHICLES: U.S. MARKET INSIGHTS & ANALYSIS

AUG 2025

EXECUTIVE DASHBOARD

Your high-voltage overview of the current EV and self-driving vehicle landscape

Consumer skepticism around Tesla's Full Self-Driving (FSD) technology is high. Nearly half of consumers believe FSD technology should be illegal, and consumers say FSD features make them less likely to buy a Tesla by a two-to-one margin. After answering additional questions about FSD, consumers consider it even less of a reason to purchase a vehicle featuring the technology.

FSD and Autonomous Vehicle (AV) skepticism is driving demand for increased regulation and legal accountability. There is strong support for holding AV manufacturers responsible for accidents and requiring stricter regulatory and advertising guardrails around features such as FSD.

Consumers want LiDAR. Consumers overwhelmingly prefer for AVs to be equipped with both LiDAR and cameras (as Waymo does) as opposed to Tesla's camera-only approach. 70% of Americans say autonomous vehicles should use both LiDAR and cameras, while only 3% support Tesla's camera-only model. And 71% want the government to mandate both.

Negative perceptions of Tesla's brand have worsened. Declining brand positivity and trust scores have hit new lows for Tesla—down significantly from the spring—and there are increasing concerns about safety and family-friendliness compared to other carmakers.

ABOUT EVIR & METHODOLOGY

The Electric Vehicle Intelligence Report tracks actionable insights on consumer attitudes, trends, and perceptions across the evolving U.S. EV landscape. Our proprietary research methodology delivers real-time insights into how people are thinking about the future of driving.

EVIR surveyed more than 8,000 U.S. consumers, weighted by education, race, gender, age, income, geography, and political preference to uncover the truths behind what's powering or stalling the EV and self-driving car transition.

THE LONG HAUL: TRENDS TO WATCH

What to watch in the fast-moving market, and where the data is going

What lies ahead for autonomous driving? Consumer skepticism around FSD and AV technology is driving increased consumer interest in a tighter regulatory and legal environment around these capabilities, while dampening interest in cars that feature the technology. How will carmakers and regulators react?

Tesla's reputational misery continues. Tesla is the only EV carmaker with negative consumer perceptions on brand reputation and trust, with a dramatic slide continuing from the spring. Does Elon have any cards left to play?

Is all publicity good publicity? Lackluster product demonstrations, front-page accidents, and FSD-related legal cases are starting to take their toll on perceptions of self-driving cars as safe and appealing. Will consumers warm up to AV technology, or has the self-driving train left the station?

Toyota and Honda top the tables. From brand reputation to vehicle safety, the two Japanese heavyweights lead consumer perceptions of EV carmakers. As the EV market continues its shift away from high-priced luxury models to everyday drivers, will these carmakers clean up, or will tariffs stand in the way?

THE FAST LANE: MARKET INSIGHTS

A summary of the data from this month's report

- Deep consumer skepticism around Tesla's foregrounding of its Full Self-Driving (FSD) technology persists, raising doubts about whether a short- or medium-term market for "robotaxis" and similar Autonomous Vehicle (AV) technology exists. 48% of consumers believe Tesla's FSD technology should be illegal, and FSD puts off more potential Tesla purchasers than it attracts by more than two-to-one.
- This skepticism drives consumer appetite for additional legal and regulatory guardrails around FSD and AV technology. 66% of consumers say Tesla should be held responsible for accidents involving its advanced driver-assistance technologies, and 78% of consumers support regulations requiring Tesla advertisements to show proper use of Autopilot and Full Self-Driving. 70% of consumers believe autonomous vehicles should use both LiDAR and cameras for safety, and 71% believe the government should mandate this standard.
- Consumers do not find FSD to be a particularly good reason to buy a Tesla vehicle. Only 4% say Full Self-Driving makes them "much more" likely to purchase a Tesla, while 10% say "somewhat more." On the other hand, 28% say it makes them "much less" likely to purchase a Tesla, and 7% "somewhat less" likely. After answering questions related to Tesla's advanced driver-assistance technologies, this split becomes even more pronounced.

Based on what you have read, does Tesla's Full Self-Driving technology make you more or less likely to buy a Tesla vehicle?



- Negative perceptions of Tesla's brand have worsened to a -15 brand positivity score, down two points from -13 in July and more than doubling from -7 in April. Toyota (+43 net positive view) and Honda (+40 net positive view) have the most positive public perception, while Tesla is the only EV brand that consumers hold net negative views of. Trust in Tesla has also plummeted to -12, down from -8 in July and quadrupling April's -3 score.



ZOOM IN:
Tesla's net
positivity has
dropped 8 points
since April,
and stands as the
only brand in the
negative



- Recent safety lawsuits may be affecting Tesla's brand. Tesla's rating among consumers shifted from 34% viewing it as unsafe to 36% over the last two surveys, while the share rating Tesla as "very safe" dropped from 17% to 13%. Honda (84%), Toyota (84%), and Chevrolet (81%) topped the safety measure. The share of consumers reporting that Tesla vehicles are not "family friendly" also increased after the legal cases, moving from 44% to 47%. No other company had more than 25% of consumers report it as not family-friendly. The most family-friendly vehicles were Toyota (84%), Honda (81%) and Ford (79%).

Perception: Tesla's Full Self-Driving and Autopilot Technologies

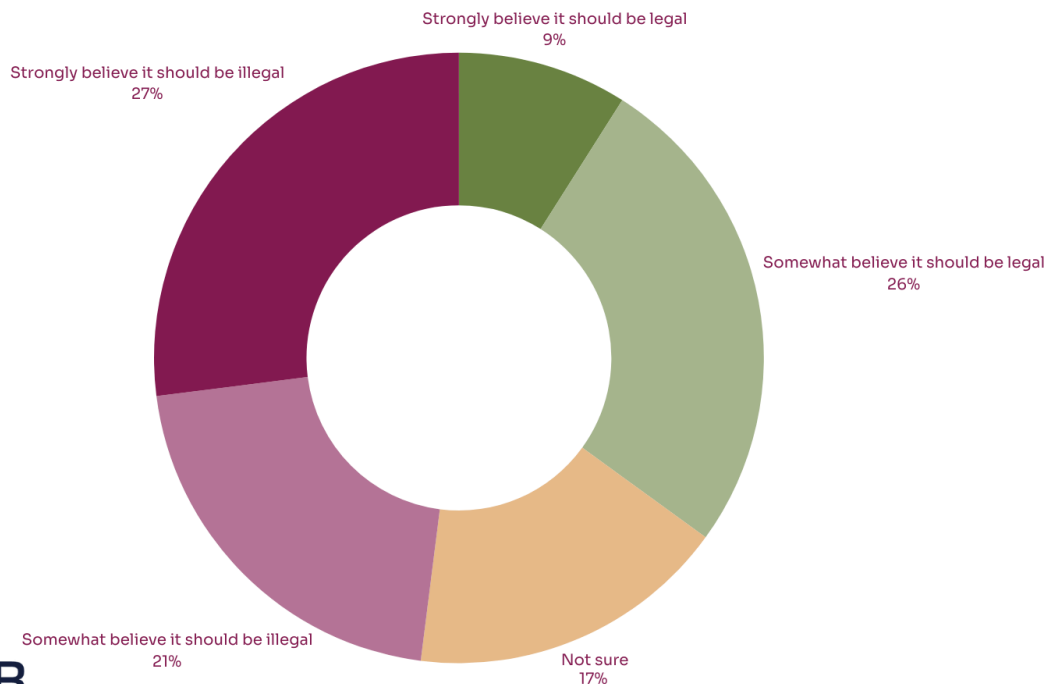
When initially presented with a description of Tesla Full Self-Driving's functionalities and expected use, nearly half of consumers (48%) say the technology should be illegal.

Roughly a third (35%) say Full Self-Driving should be legal, and 17% are unsure. Younger consumers (ages 18-44) and the highest-income consumers (income of \$150,000 or more) are more likely than average to say the technology should be legal, while older consumers (aged 65 and over) and those with incomes of less than \$100,000 are somewhat more likely than average to say the technology should be illegal.

14% of consumers say Full Self-Driving makes them more likely to buy a Tesla vehicle, while roughly a third (35%) say it makes them less likely to do so; half (51%) say it makes no difference. Younger, high-income, and urban consumers are more likely than average to say Full Self-Driving makes them somewhat more likely to buy a Tesla vehicle.

Tesla's Full Self-Driving is a set of features that help with driving. It can change lanes, follow directions, park itself, and obey traffic signs. But it is not fully self driving. The driver must always pay attention and be ready to take control at any moment.

Do you believe that Tesla's Full Self-Driving technology should be legal?



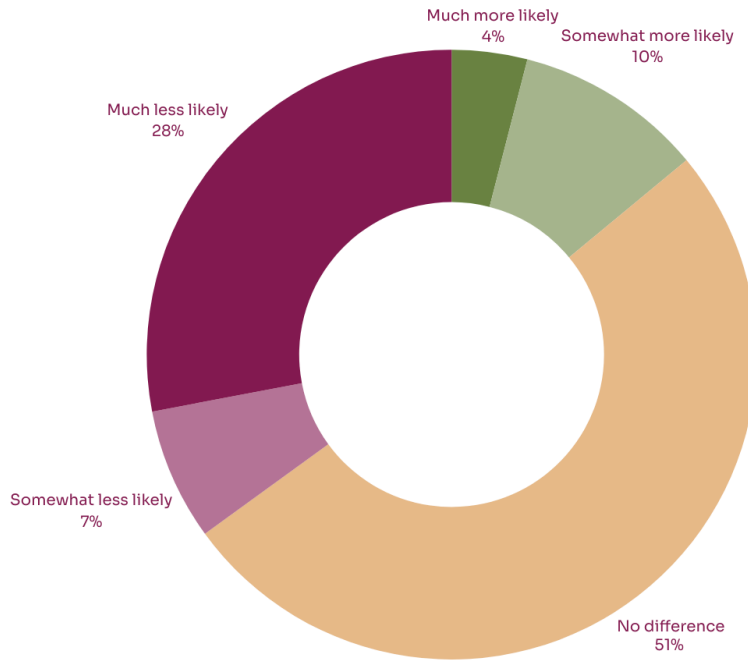
Age	18-44	45-64	65+
Strongly believe it should be legal	12%	7%	7%
Somewhat believe it should be legal	31%	24%	22%
Somewhat believe it should be illegal	19%	22%	22%
Strongly believe it should be illegal	22%	27%	33%
Not sure	17%	20%	16%

Income	\$150k+	\$100-150k	\$75-100k	<\$75k
Strongly believe it should be legal	13%	11%	10%	6%
Somewhat believe it should be legal	36%	26%	25%	22%
Somewhat believe it should be illegal	22%	22%	19%	21%
Strongly believe it should be illegal	19%	26%	30%	30%
Not sure	10%	16%	17%	21%

Geography	Urban	Suburban	Rural
Strongly believe it should be legal	11%	9%	6%
Somewhat believe it should be legal	27%	25%	26%
Somewhat believe it should be illegal	20%	21%	21%
Strongly believe it should be illegal	22%	29%	28%
Not sure	19%	16%	18%

Tesla's Full Self-Driving is a set of features that help with driving. It can change lanes, follow directions, park itself, and obey traffic signs. But it is not fully self driving. The driver must always pay attention and be ready to take control at any moment.

Does Tesla's Full Self-Driving technology make you more or less likely to buy a Tesla vehicle?



Age	18-44	45-64	65+
Much more likely	6%	3%	1%
Somewhat more likely	17%	6%	6%
Somewhat less likely	6%	7%	8%
Much less likely	23%	30%	34%
No difference	49%	54%	51%

Income	\$150k+	\$100-150k	\$75-100k	<\$75k
Much more likely	6%	3%	3%	3%
Somewhat more likely	16%	11%	8%	7%
Somewhat less likely	7%	10%	7%	7%
Much less likely	20%	26%	26%	33%
No difference	51%	50%	55%	51%

Geography	Urban	Suburban	Rural
Much more likely	5%	4%	1%
Somewhat more likely	15%	8%	7%
Somewhat less likely	6%	7%	10%
Much less likely	24%	30%	29%
No difference	51%	51%	53%

When it comes to car accidents involving Autopilot and Full Self-Driving, consumers see Tesla and its technologies bearing some responsibility. Two-thirds of consumers say that Tesla should compensate victims of crashes involving its advanced driver-assistance technologies. Presented with a case in which a person was hit and killed by a Tesla vehicle using Full Self-Driving, 44% consumers believe the technology was entirely to blame, while an almost equal share believes the driver and the technology are equally to blame.

An overwhelming majority of consumers (78%) support regulation requiring Tesla advertisements to depict proper use (i.e., the driver paying attention to the road with their hands on the wheel, as described in the company’s owner’s manuals) of Autopilot and Full Self-Driving technologies. Presented with a description of Autopilot’s functionalities and expected use, nearly half of consumers (49%) say the name “Autopilot” does not accurately reflect the technology’s capabilities and the level of driver attention required to operate it safely. About two-thirds of consumers support requiring Tesla to ensure that its vehicles retain crash data such that it is directly accessible to drivers and law enforcement.

A Florida jury found Tesla liable in a fatal 2019 crash involving a Tesla vehicle that was using Autopilot (one of Tesla’s advanced driver-assistance technologies), and ordered Tesla to pay \$243 million to the family of the woman killed and a survivor who was injured. Do you believe that Tesla should be required to pay victims of crashes involving its advanced driver-assistance technologies, including Autopilot and Full Self-Driving, or should drivers be considered entirely at fault?

All Consumers

Tesla should be required to pay victims	66%
Drivers should be considered entirely at fault	12%
Not sure	21%

Tesla's Autopilot technology helps drivers to keep their car centered within the lane. It also helps drivers maintain a safe distance from other vehicles, slowing down or speeding up as needed, and is designed only for highway driving, with the expectation that the driver will remain fully attentive and keep their hands on the wheel—similar to cruise control systems used by other automakers. **In your opinion, does the name "Autopilot" accurately reflect what the Tesla technology does and the level of driver attention required to operate it safely?**

All Consumers

Total: Accurately Reflects (Very Accurately + Somewhat Accurately)

32%

Total: Inaccurately Reflects (Very Inaccurately + Somewhat Inaccurately)

49%

Unsure

19%

In certain cases, when a Tesla vehicle has been in an accident, the accident data from the car has been kept on Tesla's database but deleted from the car itself so that only Tesla can see the accident information. **Do you support or oppose requiring Tesla to keep any accident data on the car itself so that it is accessible to the driver and law enforcement?**

All Consumers

Total: Support (Strongly Support + Somewhat Support)

64%

Total: Oppose (Somewhat Oppose + Strongly Oppose)

25%

Don't Know

12%

In 2023, a Tesla vehicle using Full Self-Driving technology hit and killed a 71-year-old woman. **Who do you believe is to blame?**

All Consumers

Total: Driver Is to Blame (Entirely to Blame + Somewhat to Blame)

13%

Total: Full Self-Driving Technology Is to Blame (Entirely to Blame Somewhat to Blame)

43%

Driver and Full Self-Driving Technology Are Equally to Blame

44%

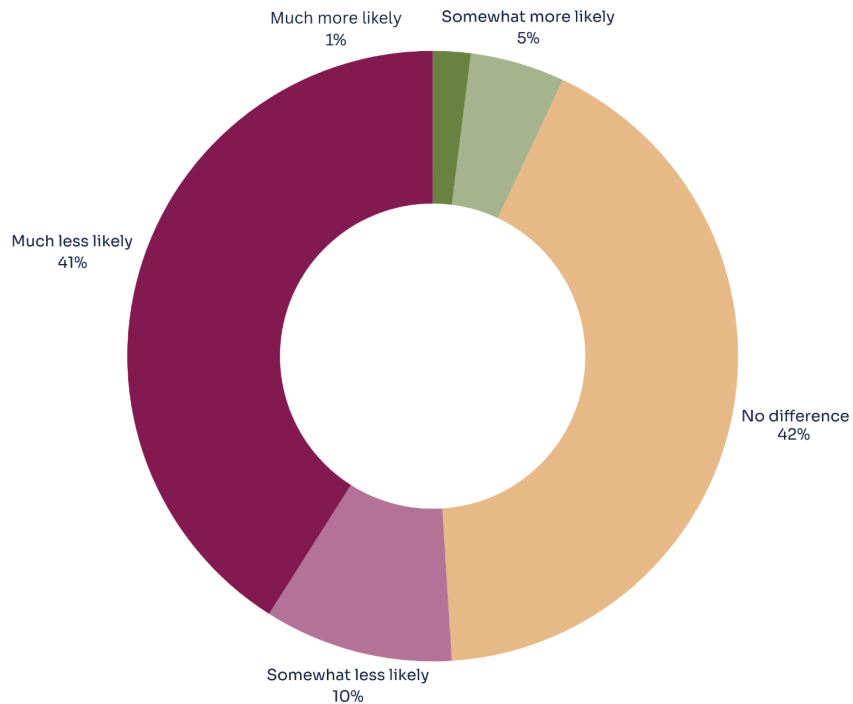
When Tesla is sued over accidents involving its Autopilot or Full Self-Driving technologies, the company often points out that its owners manual states that drivers must keep their hands on the wheel and pay attention to the road while using Autopilot or Full Self-Driving. However, Tesla advertisements often show drivers using its cars without their hands on the wheel. **Do you support or oppose regulation requiring Tesla advertisements to show proper use of its technology?**

All Consumers

Total: Support (Strongly Support + Somewhat Support)	78%
Total: Oppose (Somewhat Oppose + Strongly Oppose)	9%
Don't Know	13%

After responding to questions related to Tesla’s advanced driver-assistance technologies, consumers are less likely to see Full Self-Driving technology as an inducement to buy a Tesla vehicle. When asked a second time whether Full-Self Driving makes them more or less likely to buy a Tesla vehicle, the share of consumers who say the technology makes them “much more” or “somewhat more” likely to buy a Tesla decreases by three and five points, respectively; the share who say it makes them “somewhat less” or “much less” likely to buy a Tesla increases by three and 13 points, respectively.

Based on what you have read, does Tesla’s Full Self-Driving technology make you more or less likely to buy a Tesla vehicle?



Based on what you have read, does Tesla's Full Self-Driving technology make you more or less likely to buy a Tesla vehicle?

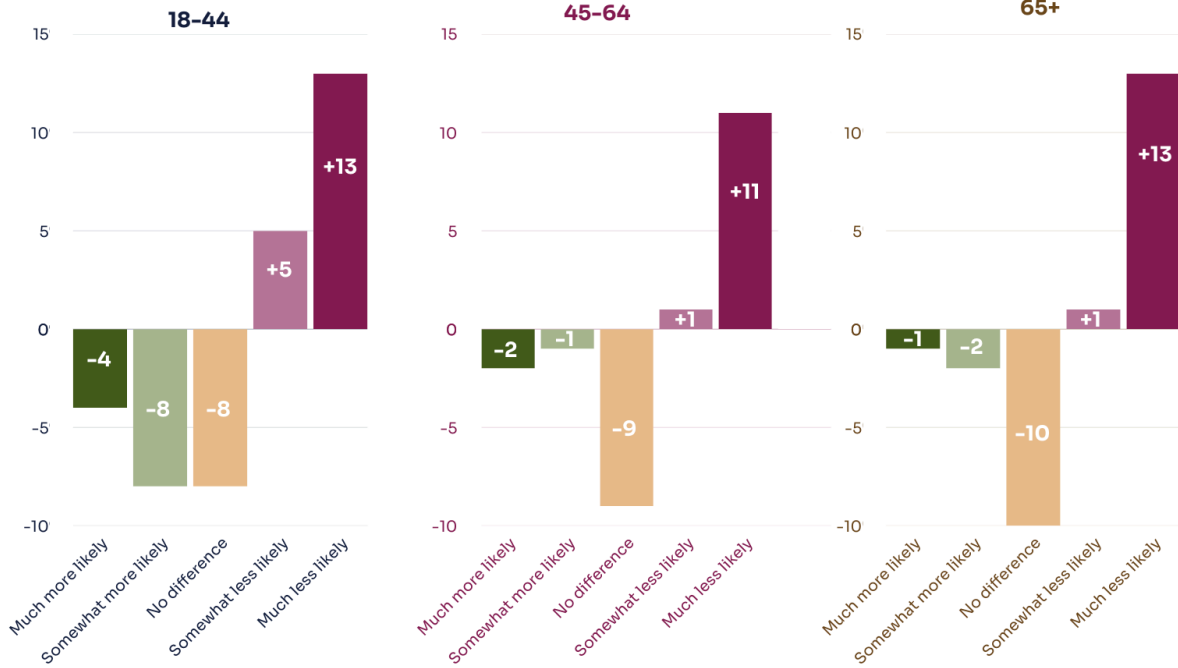


Age	18-44	45-64	65+
Much more likely	2%	1%	0%
Somewhat more likely	9%	5%	3%
Somewhat less likely	11%	8%	9%
Much less likely	36%	41%	47%
No difference	41%	45%	41%

Based on what you have read, does Tesla's Full Self-Driving technology make you more or less likely to buy a Tesla vehicle?



AGE (Net Change)

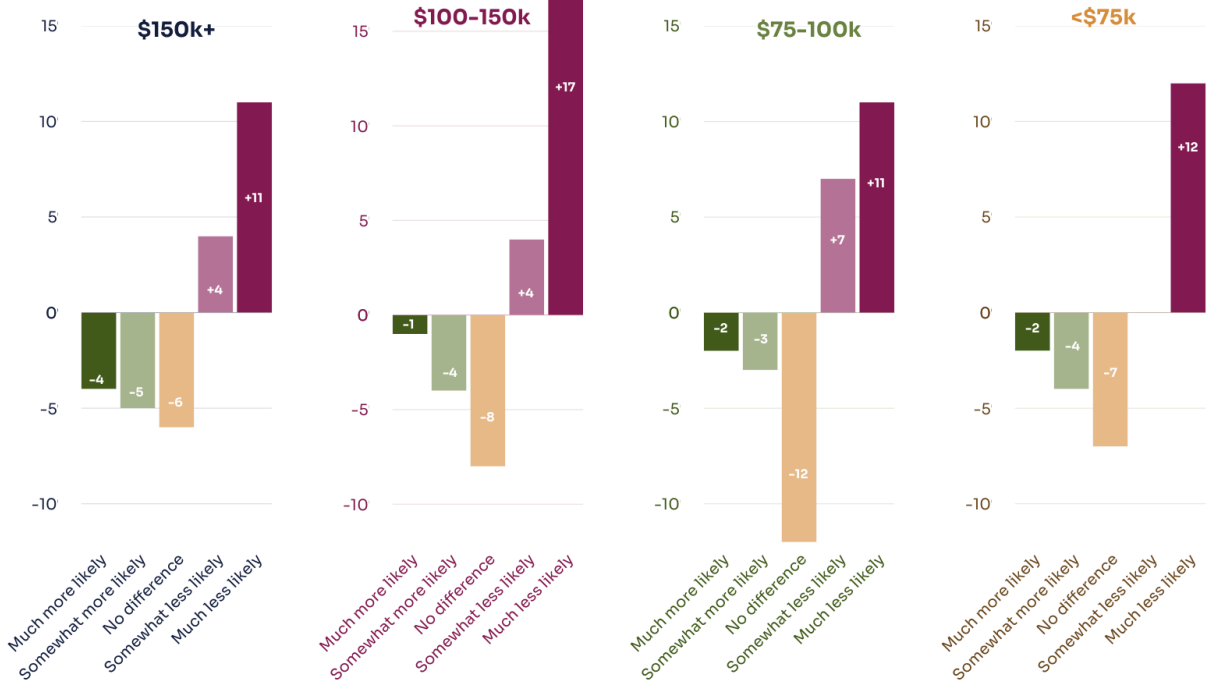


Income	\$150k+	\$100-150k	\$75-100k	<\$75k
Much more likely	2%	2%	1%	1%
Somewhat more likely	11%	7%	5%	3%
Somewhat less likely	11%	14%	14%	7%
Much less likely	31%	43%	37%	45%
No difference	45%	34%	43%	44%

Based on what you have read, does Tesla's Full Self-Driving technology make you more or less likely to buy a Tesla vehicle?



INCOME (Net Change)



Geography	Urban	Suburban	Rural
Much more likely	2%	2%	0%
Somewhat more likely	10%	4%	3%
Somewhat less likely	10%	10%	10%
Much less likely	36%	43%	43%
No difference	43%	41%	43%

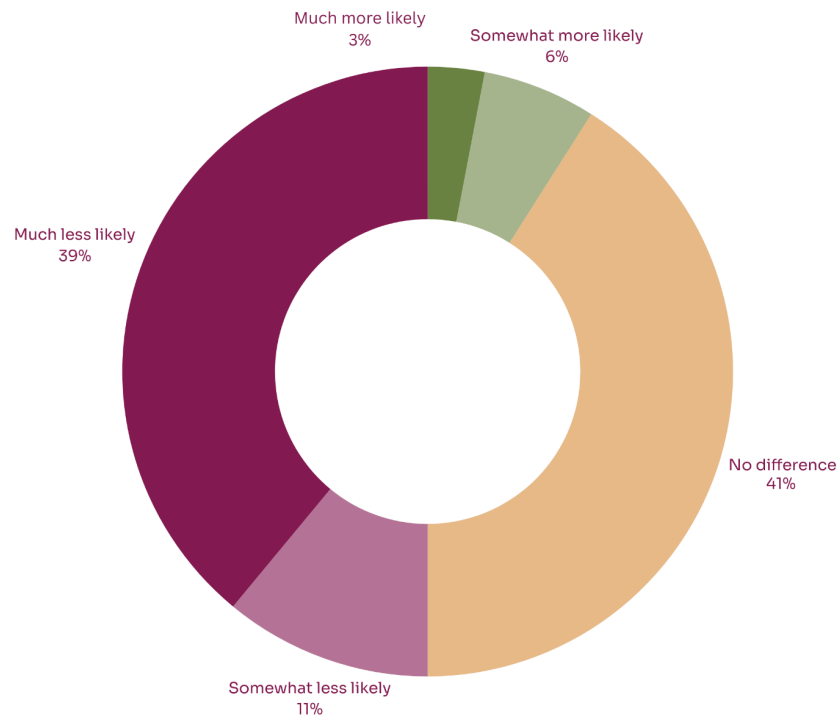
Based on what you have read, does Tesla's Full Self-Driving technology make you more or less likely to buy a Tesla vehicle?



GEOGRAPHY (Net Change)



Based on what you have read, does Tesla's Autopilot technology make you more or less likely to buy a Tesla vehicle?



Perception: Robotaxis and LiDAR

Some companies that are creating autonomous vehicles (also called robotaxis) use both cameras and LiDAR, a form of radar. Others only use cameras. Companies that use LiDAR say that the additional technology makes cars safer in case cameras alone cannot detect a person or object. Companies that use only cameras say that LiDAR is too expensive and will drive up the price of the car. **Which comes closer to your view?**

All
Consumers

Autonomous vehicles (also called robotaxis) should use both LiDAR and cameras 70%

Autonomous vehicles (also called robotaxis) should only use cameras 3%

Not sure 27%

Some companies that are creating autonomous vehicles (also called robotaxis) use both cameras and LiDAR, a form of radar. Others only use cameras. Some say that the government should require companies to use both LiDAR and cameras to make vehicles safer. Others say that companies should be allowed to use only cameras to make vehicles more affordable for consumers. **Which comes closer to your view?**

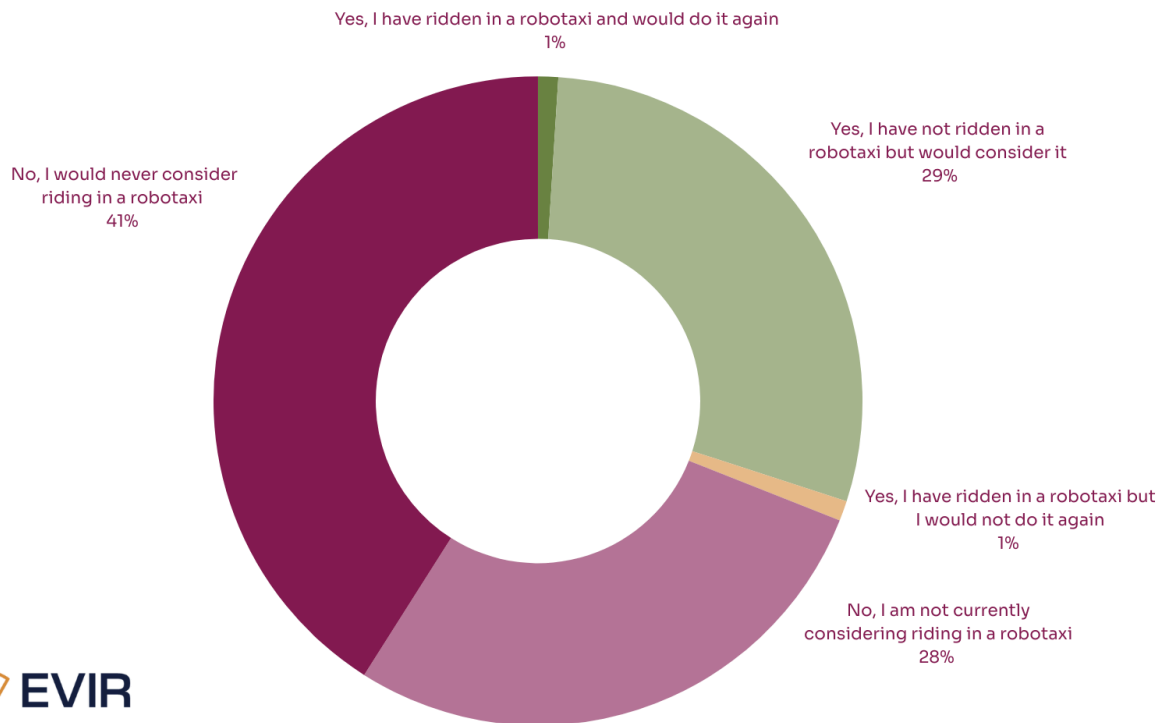
All
Consumers

Government should require autonomous vehicles (also called robotaxis) to use both LiDAR and cameras 71%

Government should allow autonomous vehicles (also called robotaxis) to use only cameras 5%

Not sure 24%

Would you consider taking a ride in an autonomous taxi, also known as a self-driving taxi or a robotaxi?

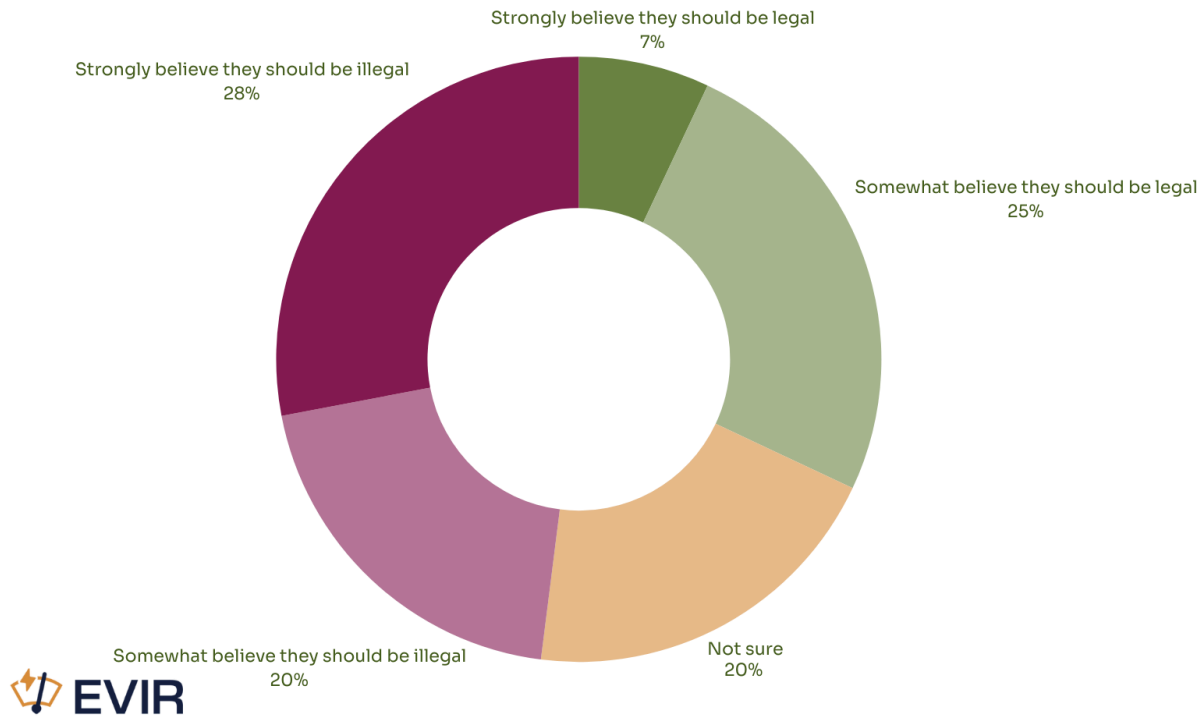


Age	18-44	45-64	65+
Yes, I have ridden in a robotaxi and would do it again	2%	1%	0%
Yes, I have ridden in a robotaxi but I would not do it again	1%	0%	0%
Yes, I have not ridden in a robotaxi but would consider it	39%	27%	19%
No, I am not currently considering riding in a robotaxi	25%	28%	31%
No, I would never consider riding in a robotaxi	32%	44%	49%

Income	\$150k+	\$100-150k	\$75-100k	<\$75k
Yes, I have ridden in a robotaxi and would do it again	2%	2%	3%	0%
Yes, I have ridden in a robotaxi but I would not do it again	1%	1%	0%	0%
Yes, I have not ridden in a robotaxi but would consider it	41%	29%	32%	23%
No, I am not currently considering riding in a robotaxi	27%	35%	24%	27%
No, I would never consider riding in a robotaxi	29%	34%	40%	49%

Geography	Urban	Suburban	Rural
Yes, I have ridden in a robotaxi and would do it again	2%	1%	0%
Yes, I have ridden in a robotaxi but I would not do it again	1%	0%	0%
Yes, I have not ridden in a robotaxi but would consider it	39%	27%	22%
No, I am not currently considering riding in a robotaxi	22%	31%	28%
No, I would never consider riding in a robotaxi	36%	41%	50%

Do you believe autonomous taxis, also known as self-driving taxis or robotaxis, should be legal?



Age	18-44	45-64	65+
Strongly believe they should be legal	9%	5%	6%
Somewhat believe they should be legal	32%	23%	18%
Somewhat believe they should be illegal	18%	18%	24%
Strongly believe they should be illegal	20%	30%	35%
Not sure	21%	24%	17%

Income	\$150k+	\$100-150k	\$75-100k	<\$75k
Strongly believe they should be legal	12%	5%	9%	5%
Somewhat believe they should be legal	35%	28%	30%	19%
Somewhat believe they should be illegal	19%	24%	18%	19%
Strongly believe they should be illegal	20%	26%	25%	32%
Not sure	13%	17%	19%	26%

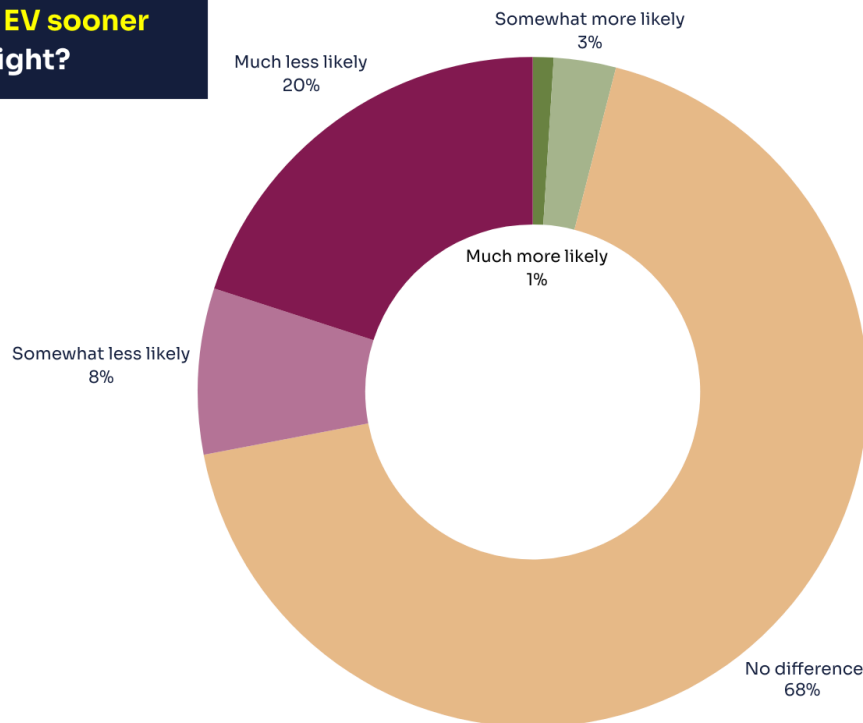
Geography	Urban	Suburban	Rural
Strongly believe they should be legal	9%	7%	4%
Somewhat believe they should be legal	29%	24%	20%
Somewhat believe they should be illegal	19%	20%	18%
Strongly believe they should be illegal	21%	29%	34%
Not sure	21%	20%	25%

Perception: Tariffs and Gas Prices as EV Purchase Factors

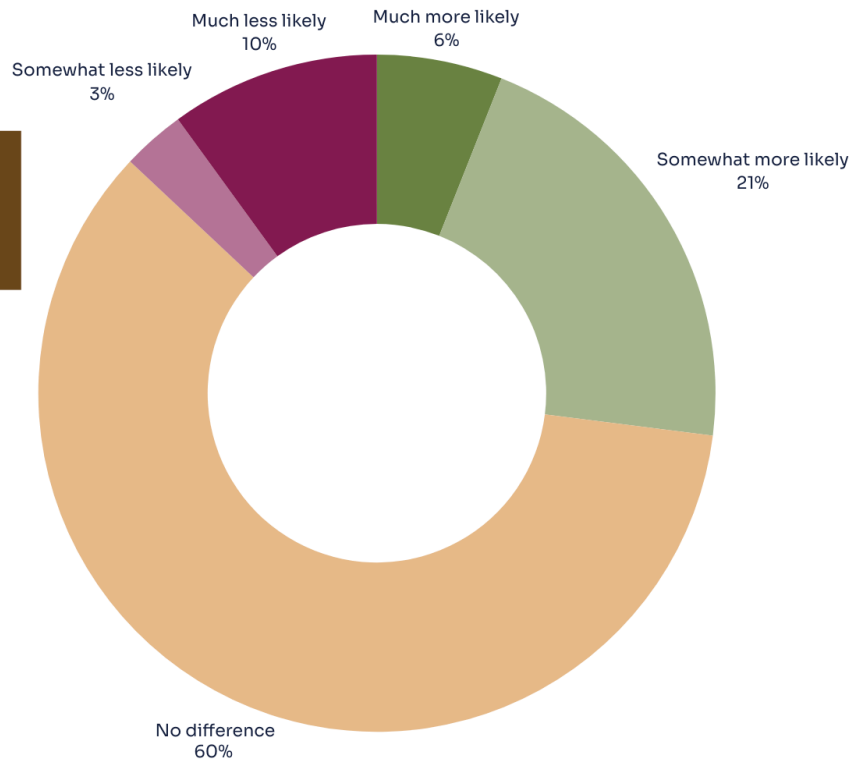
4% of consumers say that tariffs make them more likely to consider purchasing an EV sooner than they otherwise might have, while 28% say it makes them less likely. Among consumers who report that they are currently considering purchasing an EV, 13% say tariffs make them more likely to buy sooner (3% “much more” likely and 10% “somewhat more” likely), while 33% say it makes them less likely to do so (21% “somewhat less” likely and 12% “much less” likely).

Larger shares of consumers express greater sensitivity to gas prices. 27% of consumers say rising gas prices would make them more likely to buy an EV, while 13% say it would make them less likely. Among consumers currently considering purchasing an EV, 68% say rising gas prices would make them more likely to buy an EV (19% “much more” likely and 49% “somewhat more” likely); among those not currently considering purchasing an EV, 33% say rising gas prices would make them more likely to buy an EV (6% “much more” likely and 27% “somewhat more” likely).

Do the anticipated effects of tariffs make you **more likely** or **less likely** to consider buying an EV sooner than you otherwise might?

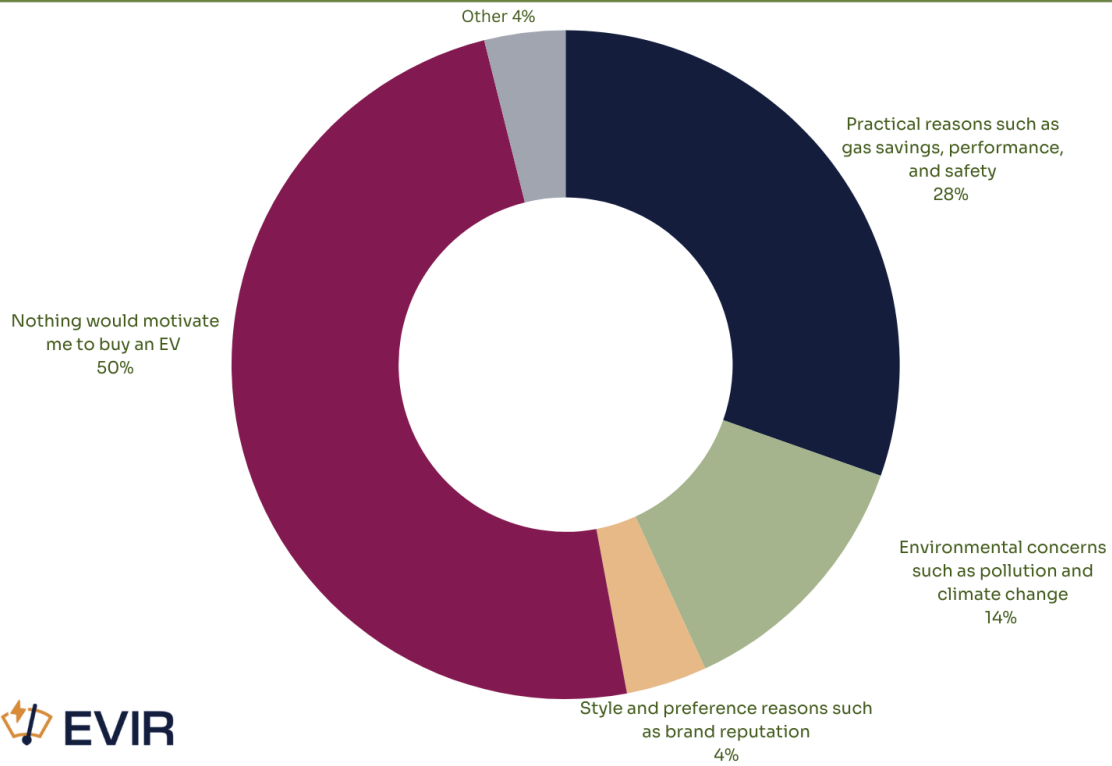


Would rising **gas prices** make you more or less likely to buy an EV?



EV Purchase Factors

What would most motivate you to buy an electric vehicle (EV)?



Factors Driving Interest in Purchasing an Electric Vehicle

Interest Factor	All	Consumers Considering Buying an EV
Saving on gas	37%	63%
Concern about the environment or climate change	21%	41%
The ability to charge at home	19%	35%
Government tax credits and rebates	16%	18%
More reliable and fewer repairs	15%	27%
Think they are the future	12%	27%
Smoother, better ride and other drivability features	9%	21%
Reflects my values	4%	9%
Feel they are more safe	4%	7%
Want a specific brand or model	4%	6%
They are cool	4%	10%
Want to be an early adopter of new technology	3%	8%
Prefer the style	3%	7%
Impressive to other people	1%	2%
Make a statement to my town or community	1%	1%
Other	1%	0%
None of these makes me interested in electric vehicles	42%	1%

Concerns About Purchasing an Electric Vehicle

Concern Factor	All	Consumers Considering Buying an EV	Consumers Not Considering Buying an EV
Price is too high	51%	63%	49%
Length of range on a battery charge	50%	65%	47%
Availability of charging stations	48%	61%	45%
I couldn't charge at home	22%	22%	23%
I'm skeptical of the technology	20%	13%	22%
Feel they are less safe	14%	8%	16%
Threat of vandalism/mistreatment	6%	9%	5%
I don't understand EVs	7%	6%	7%
Don't like the style	5%	3%	5%
Don't like the driving experience	3%	2%	3%
Other	3%	0%	3%
None of these make me concerned about purchasing an EV	15%	6%	17%

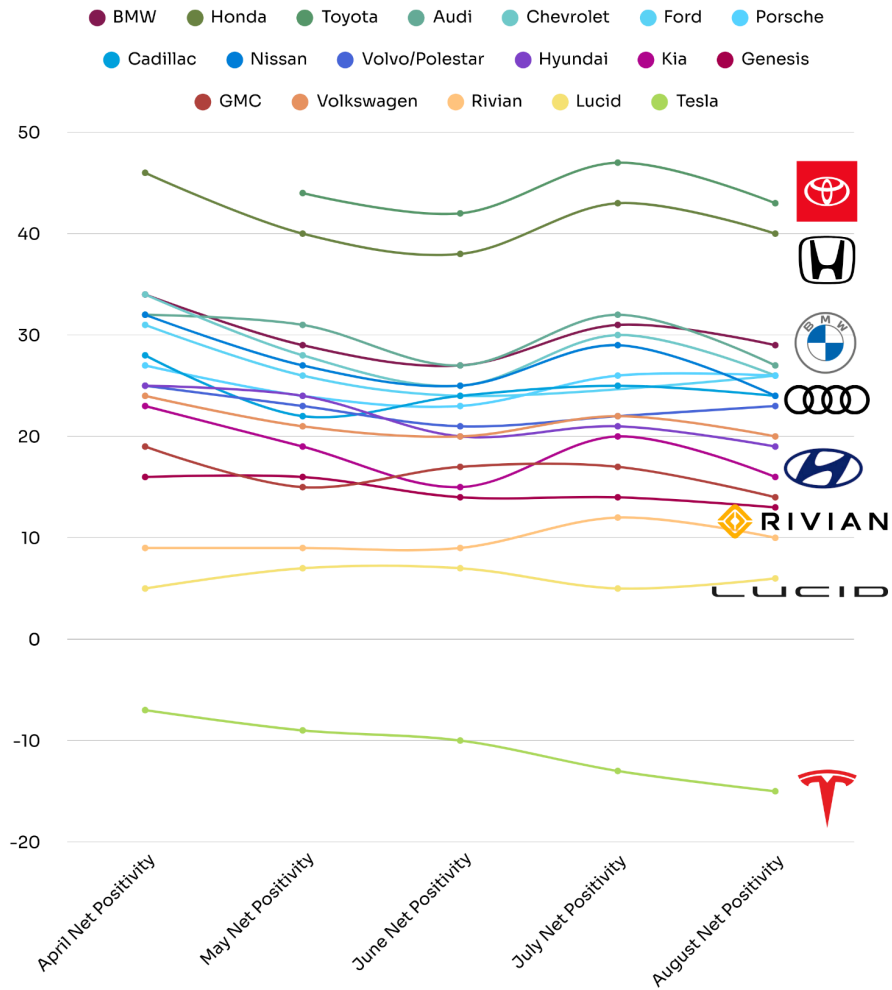
EV Brand Perception: Positive vs. Negative

All consumers



For each brand of EV, say whether you have a positive, negative, or neutral view of the brand*

*Toyota was added to this survey in May as a result of crossing 2% market share threshold and its partnership with Waymo





ZOOM IN:
Tesla's net
positivity has
dropped 8 points
since April,
and stands as the
only brand in the
negative



Brand	Total Positive View (Very Positive + Somewhat Positive)	Total Negative View (Very Negative + Somewhat Negative)	Not Familiar/ No Opinion	Net Positive View	View Intensity Score*
Toyota	48%	5%	23%	+43	18
Honda	44%	4%	24%	40	15
BMW	36%	7%	28%	29	11
Audi	34%	7%	29%	27	9
Chevrolet	36%	10%	24%	26	8
Nissan	33%	9%	26%	24	8
Ford	37%	11%	23%	26	7
Porsche	31%	5%	30%	26	7
Cadillac	32%	8%	28%	24	7
Volvo/Polestar	29%	6%	36%	23	6
Hyundai	29%	10%	31%	19	5
Volkswagen	29%	9%	28%	20	5
Kia	29%	13%	27%	16	4
Genesis	17%	4%	55%	13	3
GMC	25%	11%	30%	14	3
Rivian	14%	4%	66%	10	3
Lucid	9%	3%	78%	6	2
Tesla	24%	39%	17%	-15	-17

* **View Intensity score** is the share of consumers who say they have a “very” positive view of the brand minus the share of consumers who say they have a “very” negative view of the brand.

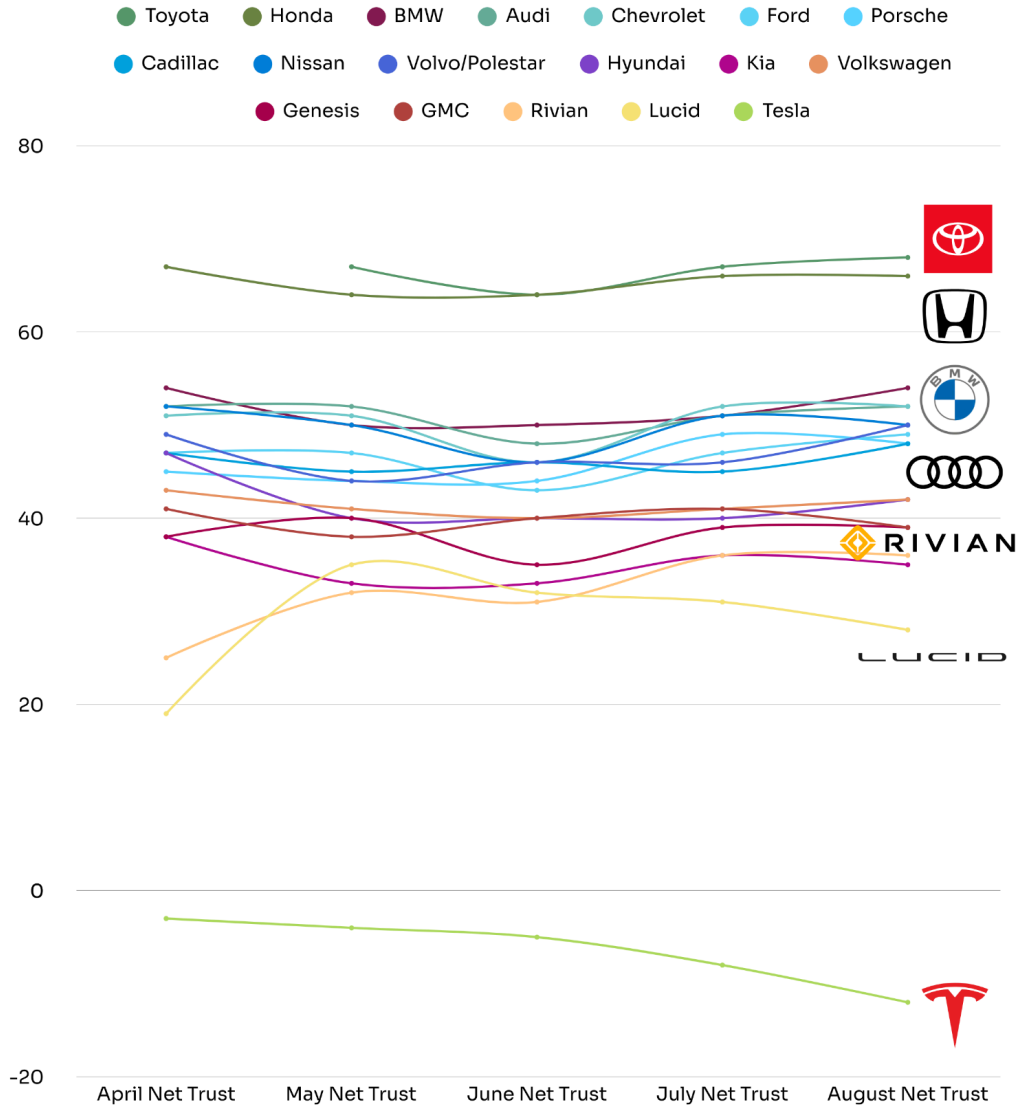
EV Brand Perception: Trust

All consumers



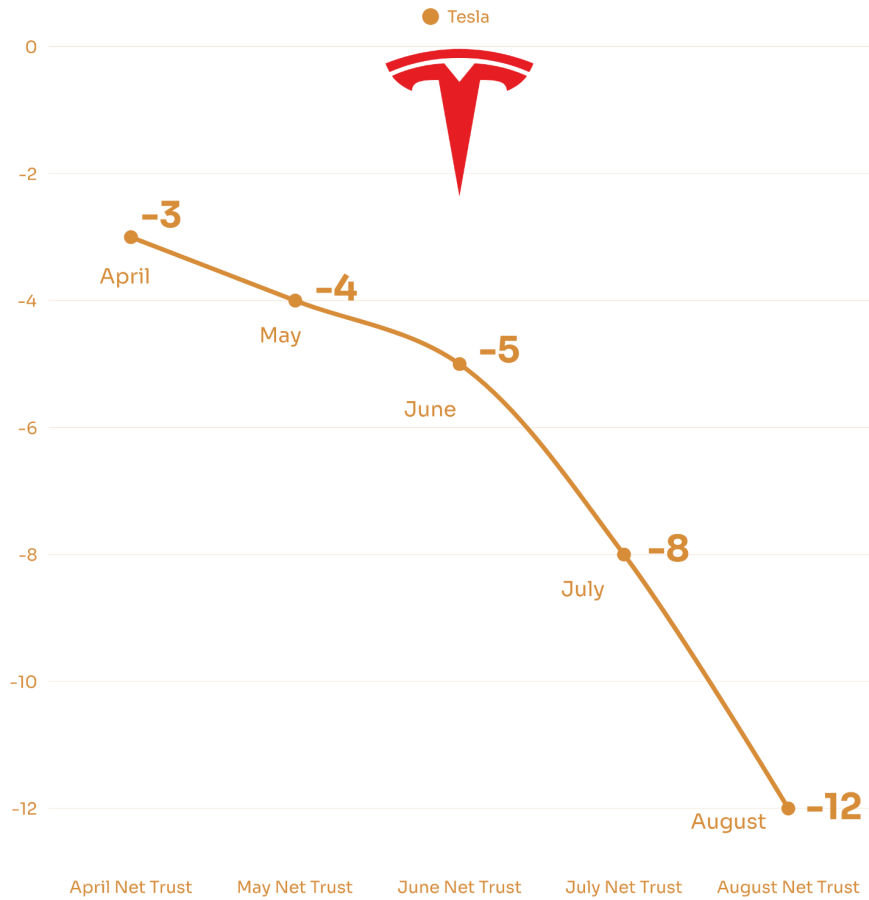
For each brand of EV, say how much you trust the brand*

*Toyota was added to this survey in May as a result of crossing 2% market share threshold and its partnership with Waymo





ZOOM IN:
Since April, Tesla's brand trust has plummeted by 9 points to -12 net trust



Brand	Total Trust (Trust a Lot + Trust Somewhat)	Total Distrust (Distrust Somewhat + Distrust a Lot)	Not Familiar/No Opinion	Net Trust	Trust Intensity Score**
Toyota	79%	11%	11%	+68	32
Honda	77%	11%	12%	66	27
BMW	70%	16%	14%	54	19
Audi	67%	15%	17%	52	15
Chevrolet	70%	18%	11%	52	14
Nissan	68%	18%	14%	50	14
Porsche	65%	17%	19%	48	14
Ford	69%	20%	11%	49	13
Cadillac	66%	18%	15%	48	13
Volvo/Polestar	66%	16%	19%	50	12
Hyundai	63%	21%	16%	42	8
Volkswagen	64%	22%	15%	42	8
Genesis	54%	15%	31%	39	8
GMC	61%	22%	16%	39	7
Rivian	53%	17%	30%	36	6
Kia	61%	26%	14%	35	5
Lucid	45%	17%	37%	28	4
Tesla	39%	51%	9	-12	-23

** Trust intensity score is the share of consumers who say they trust a brand “a lot” minus the share of consumers who say they distrust a brand “a lot”.

EV Brand Perception: Safety

All consumers

Brand	All : Safe	Considering Buying an EV	Not Buying an EV	Already Own an EV
Honda	84%	92%	81%	96%
Toyota	84%	93%	82%	94%
Chevrolet	81%	91%	78%	89%
Cadillac	79%	90%	77%	92%
BMW	79%	90%	75%	97%
Ford	78%	91%	74%	93%
Nissan	78%	88%	75%	97%
Audi	77%	88%	73%	93%
Volkswagen	77%	88%	73%	96%
GMC	76%	81%	75%	83%
Volvo	76%	90%	71%	92%
Hyundai	73%	85%	69%	95%
Kia	72%	82%	69%	94%
Porsche	67%	77%	63%	94%
Genesis	63%	77%	59%	95%
Rivian	62%	75%	55%	88%
Lucid	56%	70%	48%	81%
Tesla	49%	64%	44%	82%

EV Brand Perception: Good For Families

All consumers

Brand	All: Good for Families	Considering Buying an EV	Not Buying an EV	Already Own an EV
Toyota	84%	93%	82%	93%
Honda	81%	91%	79%	97%
Ford	79%	92%	75%	87%
Chevrolet	78%	89%	76%	89%
Nissan	78%	89%	75%	93%
Hyundai	73%	86%	69%	90%
Volkswagen	72%	85%	68%	90%
Kia	71%	84%	67%	94%
Cadillac	71%	86%	67%	89%
GMC	70%	78%	68%	79%
Volvo/Polestar	70%	84%	65%	95%
Audi	66%	79%	62%	92%
BMW	66%	78%	62%	91%
Genesis	57%	72%	52%	92%
Rivian	52%	67%	43%	90%
Lucid	41%	49%	37%	82%
Tesla	37%	57%	31%	86%
Porsche	36%	42%	33%	58%

EV Brand Perception: Luxury

All consumers

Brand	All: Luxury	Considering Buying an EV	Not Buying an EV	Already Own an EV
BMW	90%	94%	89%	95%
Cadillac	85%	86%	84%	84%
Audi	77%	85%	76%	82%
Porsche	62%	94%	91%	98%
Tesla	62%	72%	59%	74%
Genesis	61%	74%	57%	83%
Volvo/Polestar	53%	63%	50%	75%
Rivian	50%	59%	46%	65%
Lucid	49%	61%	40%	79%
GMC	31%	31%	31%	27%
Volkswagen	22%	25%	21%	22%
Toyota	17%	15%	18%	15%
Nissan	16%	14%	16%	24%
Chevrolet	16%	15%	17%	20%
Honda	14%	11%	15%	18%
Hyundai	14%	18%	13%	17%
Ford	14%	15%	13%	18%
Kia	11%	10%	11%	27%

EV Brand Perception: Key Consumer Segments

Income

Brand	\$150k+: Net Positive Views	\$150k+: View Intensity Score	Brand	\$100k-150k: Net Positive Views	\$100k-150k: View Intensity Score
Toyota	54	23	Toyota	54	21
BMW	43	18	Honda	49	17
Honda	48	17	BMW	34	12
Audi	39	13	Porsche	29	10
Porsche	40	11	Audi	32	9
Volvo	37	11	Hyundai	24	9
Hyundai	27	9	Chevrolet	26	8
Cadillac	26	9	Kia	22	8
Chevrolet	27	8	Nissan	29	7
Volkswagen	23	8	Cadillac	24	7
Nissan	21	8	Ford	26	6
Ford	32	7	Genesis	22	6
Genesis	19	6	Volvo	29	5
Rivian	26	4	Rivian	11	4
Kia	19	3	GMC	9	4
Lucid	16	3	Volkswagen	25	3
GMC	17	0	Lucid	7	2
Tesla	2	-5	Tesla	-11	-13
Brand	\$75k-100k: Net Positive Views	\$75k-100k: View Intensity Score	Brand	<\$75k: Net Positive Views	<\$75k: View Intensity Score
Toyota	45%	21	Toyota	35%	15
Honda	41	15	Honda	33	14
BMW	29	9	Chevrolet	27	9
Nissan	26	8	Nissan	25	9
Audi	24	8	Ford	25	8
Chevrolet	29	7	BMW	20	8

Volvo	15	5	Cadillac	23	7
Porsche	23	4	Audi	19	7
Ford	21	4	Porsche	19	6
Hyundai	17	4	Volkswagen	19	5
Volkswagen	14	4	GMC	17	4
Genesis	9	4	Kia	15	4
Cadillac	23	3	Hyundai	17	4
GMC	14	3	Volvo	16	3
Kia	13	3	Rivian	5	2
Rivian	9	3	Genesis	7	1
Lucid	5	2	Lucid	2	1
Tesla	-19	-19	Tesla	-21	-21

Geography

Brand	Rural: Net Positive View	Rural: View Intensity Score	Brand	Suburban: Net Positive View	Suburban: View Intensity Score	Brand	Urban: Net Positive View	Urban: View Intensity Score
Toyota	33	14	Toyota	44	19	Toyota	52	21
Honda	27	9	Honda	41	16	Honda	48	19
Chevrolet	24	7	BMW	27	10	BMW	36	18
Ford	21	5	Audi	26	9	Chevrolet	37	14
BMW	21	5	Porsche	26	8	Nissan	37	14
GMC	16	4	Nissan	24	8	Porsche	36	13
Nissan	15	4	Cadillac	26	7	Audi	36	12
Volkswagen	16	3	Chevrolet	24	7	Cadillac	30	12
Volvo	16	3	Ford	24	7	Ford	37	10
Cadillac	16	3	Volvo	22	7	Hyundai	29	9
Audi	18	2	Hyundai	19	6	Volkswagen	25	8
Genesis	9	2	Volkswagen	20	5	GMC	18	7
Kia	8	2	Kia	15	4	Kia	26	7
Porsche	13	1	Genesis	13	4	Volvo	28	5
Hyundai	13	1	Rivian	11	3	Genesis	17	5
Rivian	4	1	GMC	13	2	Rivian	15	4
Lucid	2	-1	Lucid	5	2	Lucid	11	3
Tesla	-18	-20	Tesla	-19	-19	Tesla	-5	-8

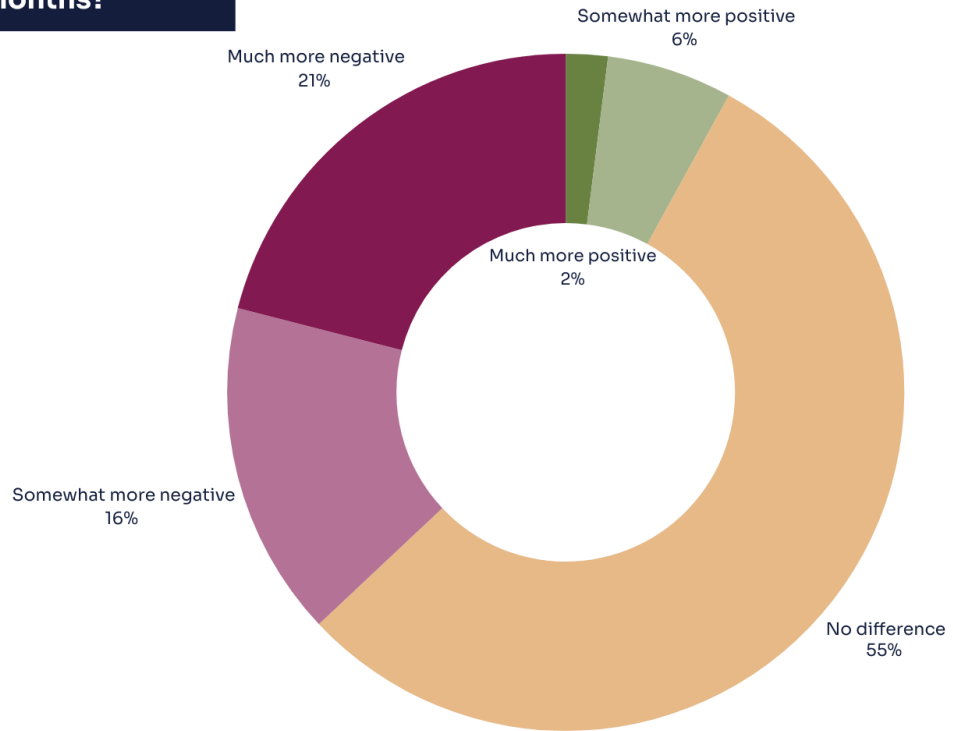
Age

Brand	18-44: Net Positive Views	18-44: View Intensity Score	Brand	45-64: Net Positive Views	45-64: View Intensity Score	Brand	65+ : Net Positive Views	65+: View Intensity Score
Toyota	56	27	Toyota	39	16	Toyota	33	11
Honda	51	24	Honda	35	13	Honda	32	8
BMW	40	20	BMW	25	8	Audi	21	4
Chevrolet	39	15	Audi	23	8	Ford	21	4
Porsche	38	15	Volvo	22	8	BMW	20	4
Nissan	33	14	Chevrolet	26	6	Volvo	20	4
Cadillac	36	13	Ford	22	5	Nissan	17	4
Audi	36	13	Porsche	22	5	Cadillac	13	3
Ford	35	12	Nissan	21	5	Chevrolet	15	3
Hyundai	32	10	Cadillac	22	5	Porsche	14	2
Volkswagen	32	10	Volkswagen	17	4	Genesis	12	2
Kia	26	10	Hyundai	15	4	Hyundai	11	2
GMC	24	7	Genesis	12	3	Kia	12	2
Genesis	17	6	Rivian	10	3	Rivian	5	2
Volvo	25	5	GMC	13	2	Lucid	5	2
Rivian	15	3	Lucid	4	1	Volkswagen	10	0
Lucid	9	2	Kia	10	0	GMC	6	-1
Tesla	-6	-4	Tesla	-14	-14	Tesla	-21	-21

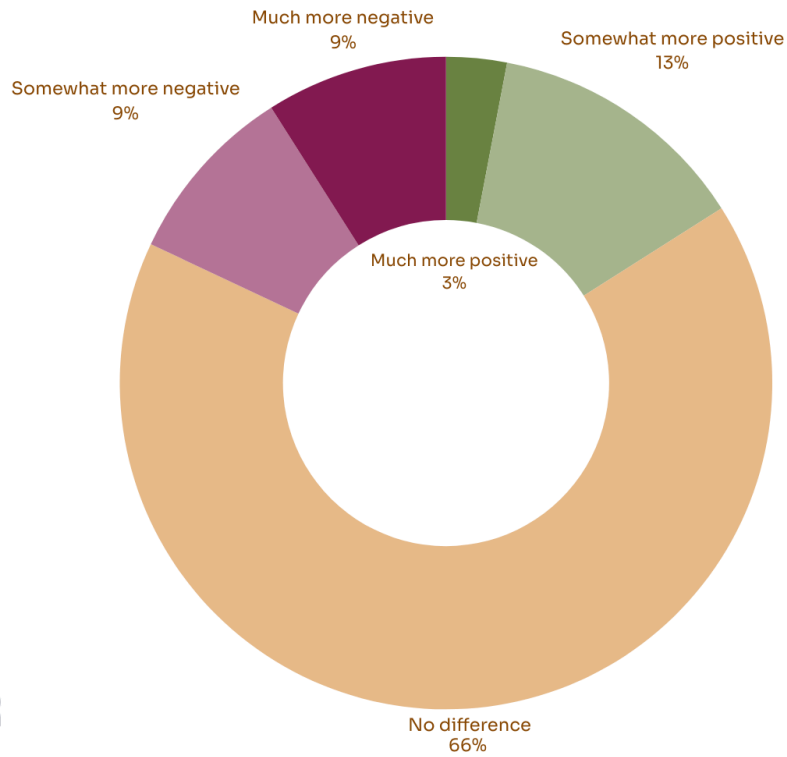
Consumer Interest: EV Models

Model	Would Never Consider	Currently Considering	Open to Considering	Not Likely to Consider
Tesla Cybertruck	52%	8%	19%	21%
Tesla Model X	32%	13%	32%	24%
Tesla Model 3	30%	15%	28%	26%
Tesla Model Y	30%	15%	31%	24%
Rivian R1S	16%	8%	49%	26%
Kia EV9	16%	10%	46%	27%
Ford F-150 Lightning	15%	12%	45%	28%
Cadillac Lyriq	14%	8%	44%	34%
Volkswagen ID.4	13%	6%	48%	33%
Ford Mustang Mach-E	12%	8%	45%	35%
BMW i4	12%	10%	53%	25%
Chevrolet Equinox EV	11%	9%	51%	29%
Hyundai Ioniq 5	11%	13%	51%	25%
Honda Prologue	9%	5%	55%	31%

How have your views of Tesla electric vehicles (EVs) changed over the past 6 months?



How have your views of electric vehicles (EVs) changed over the past 6 months?



The Full Charge: EV Infrastructure

EV Charger Models

Consumers who have owned or are considering purchasing an EV charger

EV Charger Model	Interest Score *	Currently Considering	Open to Considering	Would Never Consider
Chargepoint Home Flex Level 2 EV Charger	78	18%	66%	6%
Lectron Portable Level 2 Charger	74	7%	73%	6%
Emporia Level 2 EV	69	9%	68%	8%
United Charger Grizzl-E Duo	67	4%	68%	5%
Enphase IQ	64	5%	65%	6%
United Chargers Grizzl-E	57	4%	69%	6%
Tesla Wall Connector	51	26%	43%	18%
Enel	46	4%	53%	11%

*Interest score is the share of consumers considering purchasing an EV charger who say they are “currently considering” or “open to considering” the model minus those who say they “would never consider” the model.

Home Battery Storage System Models

Consumers who have owned or are considering purchasing a home battery storage system

Home Battery Storage Systems	Interest Score*	Currently Considering	Open to Considering	Would Never Consider
LG Energy Solution	70	11%	68%	9%
Panasonic EverVolt	66	5%	69%	8%
Enphase IQ	64	9%	64%	9%
Generac PWRcell	63	9%	64%	10%
SolarEdge Energy Bank	55	6%	60%	11%
Bluetti EP900	53	3%	62%	12%
GM Energy PowerBank	52	6%	58%	12%
Sonnen Eco	52	2%	62%	12%
Sungrow Residential	52	1%	63%	12%
BYD Battery-Box	45	1%	58%	14%
Tesla Powerwall	41	20%	44%	23%

***Interest score** is the share of consumers considering purchasing a home battery storage system who say they are “currently considering” or “open to considering” the model minus those who say they “would never consider” the model.

When states and municipalities build charging networks, which companies would you prefer they use?

All consumers

Brand	Most Prefer:	Least Prefer
Tesla	28%	24%
Chargepoint	21%	6%
Blink Charging	9%	9%
Voltpost	6%	8%
Wallbox	6%	8%
Enel X Way	2%	8%
None of the above	56%	59%