

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

JAN 2026

EXECUTIVE DASHBOARD

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

Tesla confidence and purchase/investment interest decline over broken AV promises. Presented with a list of autonomous vehicle promises Tesla executives made on 2025 earnings calls that have yet to be fulfilled, consumer response is decisively negative. Just 10% say the unfulfilled promises make them more confident in Tesla, while 36% say they make them less confident (net -26). Thirty-two percent say the missed AV commitments make them less likely to purchase a Tesla vehicle, while 7% say it makes them more likely (-25), and 33% say they're less likely to purchase Tesla stock, compared to 14% who say they're more likely (-19). Younger consumers (18-34) show particularly sharp declines in confidence and likelihood of purchasing a Tesla vehicle.

Tesla-exposed investors react negatively to Tesla's detoured AV roadmap. Investors with exposure to Tesla via S&P 500 index funds and other diversified funds express less confidence in Tesla as a company in shares similar to consumers overall, with 10% saying they are more confident and 35% saying they are less confident (net -25). While Tesla-exposed investor likelihood of purchasing Tesla stock is slightly more resilient than overall consumer likelihood (-19), net response is still firmly negative (-16)

Toyota and Honda continue to lead on EV brand positivity and trust. Toyota and Honda maintain a significant lead over competitors, with 49% of consumers expressing a positive view of Toyota (view intensity score: 21) and 44% expressing a positive view of Honda (view intensity score: 16). Consumer trust in these brands is even higher: total trust in Toyota is 66% (trust intensity score: 26) and total trust in Honda is 64% (trust intensity score: 21). With a -14 view intensity score and a -14 trust intensity score, Tesla continues to rank at the bottom of the pack on these measures.

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 3,000 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.

In the data below, "Tesla-Exposed Investors" refers to individuals who report market exposure to Tesla through ETFs, mutual funds, and other investment products.

Perception: Tesla's AV Roadmap

Here are some plans shared by Elon Musk and other Tesla executives on public earnings calls in 2025 that have not been fulfilled.

- Saying that Tesla would be “launching the autonomous ride-hailing across most of the country” and that Tesla “will probably have autonomous ride-hailing in probably half the population of the US by the end of the year” in 2025.
- Saying that, in certain areas, when customers order Tesla cars, the cars will drive themselves autonomously to the customer “from the factory by the end of this year. A good car will deliver itself to where you are unless you say you do not want that” in 2025.
- Saying that Tesla will “be operating robotaxis in, I think, about eight to ten metro areas by the end of the year” and that they “expect to be operating in Nevada and Florida and Arizona by the end of the year” in 2025.

Does the fact that Tesla did not fulfill these plans in 2025 make you...

More or less confident in Tesla as a company?	Total More Confident (<i>Much More Confident + Somewhat More Confident</i>)	Total Less Confident (<i>Much Less Confident + Somewhat Less Confident</i>)	No Change in Confidence
All Consumers	10%	36%	55%
Age: 18-34	12%	39%	49%
Age: 35-49	12%	33%	55%
Age: 50-64	9%	33%	57%
Age: 65+	7%	34%	58%
Income: <\$75k	9%	32%	58%
Income: \$75k-150k	11%	37%	52%
Income: \$150k+	9%	38%	53%
Education: High School or Less	11%	29%	60%
Education: Some College	9%	30%	61%
Education: Bachelors	8%	41%	51%
Education: Advanced Degree	12%	44%	44%

More or less likely to purchase a Tesla vehicle?	Total More Likely (<i>Much More Likely + Somewhat More Likely</i>)	Total Less Likely (<i>Much Less Likely + Somewhat Less Likely</i>)	No Change in Likelihood
All Consumers	7%	32%	60%
Age: 18-34	10%	38%	52%
Age: 35-49	9%	29%	62%
Age: 50-64	8%	31%	62%
Age: 65+	4%	31%	64%
Income: <\$75k	8%	33%	60%
Income: \$75k-150k	9%	32%	59%
Income: \$150k+	6%	32%	62%
Education: High School or Less	9%	30%	61%
Education: Some College	5%	31%	63%
Education: Bachelors	6%	35%	59%
Education: Advanced Degree	11%	33%	56%

More or less likely to purchase Tesla stock?	Total More Likely (<i>Much More Likely + Somewhat More Likely</i>)	Total Less Likely (<i>Much Less Likely + Somewhat Less Likely</i>)	No Change in Likelihood
All Consumers	14%	33%	54%
Age: 18-34	19%	39%	42%
Age: 35-49	17%	29%	54%
Age: 50-64	12%	33%	56%
Age: 65+	8%	32%	60%
Income: <\$75k	13%	32%	55%
Income: \$75k-150k	15%	33%	52%
Income: \$150k+	12%	35%	53%
Education: High School or Less	16%	30%	55%
Education: Some College	12%	31%	58%
Education: Bachelors	13%	36%	52%
Education: Advanced Degree	15%	39%	47%

Investor Spotlight

Among Tesla-exposed investors...

Net -25 More Confident in Tesla as a Company

Presented with a list of Tesla's unmet 2025 earnings call promises on AVs, 35% say they are less confident in Tesla as a company, while 10% say they are more confident....

Net -16 More Likely to Purchase Tesla Stock

...and 32% say they are less likely to purchase Tesla stock, while 16% say they are more likely to purchase Tesla stock.

+9 Concern That Musk's Pay Could Reward Overpromising

A majority, 55%, say they are concerned that Elon Musk's \$1 trillion pay package could reward him for making big promises about Tesla's future that he does not fully deliver on; 36% say they are not concerned.

Perception: EV Brands

EV Brand Perception: Positive vs. Negative

All consumers

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	49%	7%	15%	42	21
Honda	44%	7%	16%	37	16
BMW	37%	11%	18%	26	10
Audi	35%	9%	21%	26	9
Porsche	33%	9%	21%	24	9
Chevrolet	35%	12%	16%	23	8
Cadillac	33%	11%	18%	22	8
Ford	37%	14%	15%	23	7
Nissan	36%	11%	17%	25	7
Hyundai	30%	11%	21%	19	5
Volvo	28%	9%	25%	19	5
GMC	27%	14%	21%	13	4
Volkswagen	29%	12%	19%	17	4
Kia	29%	16%	18%	13	4
Genesis	21%	7%	38%	14	4
Rivian	19%	8%	47%	11	2
Lucid	14%	6%	54%	8	0
Cruise	7%	7%	61%	0	-2
Waymo	13%	15%	46%	-2	-3
Zoox	3%	6%	75%	-3	-3
Tesla	27%	37%	9%	-10	-14

* **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

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	66%	12%	23%	54	26
Honda	64%	12%	24%	52	21
BMW	57%	16%	28%	41	12
Chevrolet	57%	17%	25%	40	11
Audi	54%	14%	31%	40	11
Cadillac	56%	16%	28%	40	10
Ford	58%	20%	23%	38	10
Porsche	52%	16%	32%	36	9
Nissan	57%	17%	27%	40	9
Volvo	49%	14%	36%	35	7
Volkswagon	51%	18%	30%	33	6
GMC	50%	20%	30%	30	6
Hyundai	49%	18%	33%	31	5
Kia	48%	23%	29%	25	4
Genesis	32%	13%	55%	19	3
Rivian	26%	13%	61%	13	1
Lucid	21%	11%	68%	10	0
Cruise	15%	11%	74%	4	-2
Zoox	8%	10%	82%	-2	-3
Waymo	20%	20%	60%	0	-4
Tesla	39%	42%	19%	-3	-14

** 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: Key Consumer Segments

Income

Brand	\$150k+: Total Positive View	\$150k+: View Intensity Score	Brand	\$75-150k: Total Positive View	\$75-150k: View Intensity Score	Brand	<\$75k: Total Positive View	<\$75k: View Intensity Score
Toyota	55%	20	Toyota	54%	22	Toyota	45%	20
Honda	51%	18	Honda	48%	18	Honda	40%	15
Audi	42%	12	Audi	40%	8	Chevrolet	35%	11
BMW	45%	12	BMW	40%	8	BMW	32%	11
Porsche	36%	10	Cadillac	36%	7	Nissan	35%	9
Cadillac	36%	8	Ford	40%	6	Cadillac	31%	9
Volvo	39%	8	Chevrolet	37%	6	Audi	31%	9
Chevrolet	37%	7	Porsche	36%	6	Porsche	29%	9
Ford	39%	6	Nissan	35%	6	Ford	34%	8
Hyundai	36%	6	Volvo	36%	5	GMC	27%	6
Genesis	28%	5	Hyundai	32%	4	Kia	29%	5
Volkswagen	36%	4	Rivian	25%	4	Volkswagen	28%	5
Lucid	18%	4	Genesis	26%	3	Hyundai	27%	5
Nissan	38%	3	Volkswagen	29%	2	Volvo	22%	4
Kia	31%	2	Kia	29%	2	Genesis	17%	4
Rivian	27%	2	Lucid	17%	2	Rivian	13%	1
GMC	28%	1	GMC	27%	1	Lucid	10%	0
Cruise	7%	0	Cruise	8%	-2	Cruise	7%	-2
Waymo	16%	-1	Zoox	4%	-2	Zoox	2%	-3
Zoox	3%	-3	Waymo	13%	-3	Waymo	11%	-4
Tesla	55%	-14	Tesla	30%	-15	Tesla	23%	-14

Age

Brand	18-34: Total Positive Views	18-34: View Intensity Score	Brand	35-49: Total Positive Views	35-49: View Intensity Score
Toyota	57%	28	Toyota	53%	26
Honda	49%	20	Honda	47%	20
BMW	46%	17	Chevrolet	40%	14
Chevrolet	41%	16	Audi	41%	14
Porsche	42%	14	BMW	44%	14
Nissan	42%	13	Cadillac	36%	12
Audi	42%	13	Ford	44%	12
Ford	41%	12	Porsche	39%	11
Cadillac	35%	11	Nissan	39%	10
Volkswagen	34%	9	GMC	32%	8
Hyundai	36%	9	Volkswagen	34%	8
GMC	28%	9	Hyundai	33%	8
Kia	33%	6	Volvo	30%	7
Volvo	22%	4	Genesis	23%	6
Genesis	20%	4	Rivian	23%	6
Rivian	18%	2	Kia	31%	5
Lucid	12%	1	Lucid	17%	3
Cruise	9%	-2	Cruise	9%	1
Zoox	5%	-3	Waymo	13%	0
Waymo	14%	-5	Zoox	4%	-1
Tesla	30%	-12	Tesla	30%	-9
Brand	50-64: Total Positive Views	50-64: View Intensity Score	Brand	65+: Total Positive Views	65+: View Intensity Score
Toyota	49%	20	Toyota	41%	12
Honda	47%	19	Honda	38%	10
Cadillac	34%	10	Audi	28%	3
BMW	35%	10	BMW	29%	3

Audi	34%	9	Cadillac	27%	2
Chevrolet	37%	8	Porsche	22%	2
Porsche	31%	8	Ford	30%	2
Nissan	35%	7	Volvo	27%	2
Ford	37%	6	Hyundai	24%	1
Volvo	29%	6	Genesis	21%	1
Hyundai	31%	5	Chevrolet	28%	0
Volkswagen	29%	4	Nissan	29%	0
Genesis	21%	4	Kia	23%	-1
GMC	29%	3	Rivian	18%	-1
Kia	30%	3	GMC	22%	-2
Rivian	18%	2	Volkswagen	24%	-2
Lucid	13%	2	Lucid	12%	-2
Cruise	7%	-1	Cruise	4%	-3
Zoox	3%	-2	Zoox	2%	-4
Waymo	11%	-4	Waymo	12%	-6
Tesla	27%	-13	Tesla	24%	-19