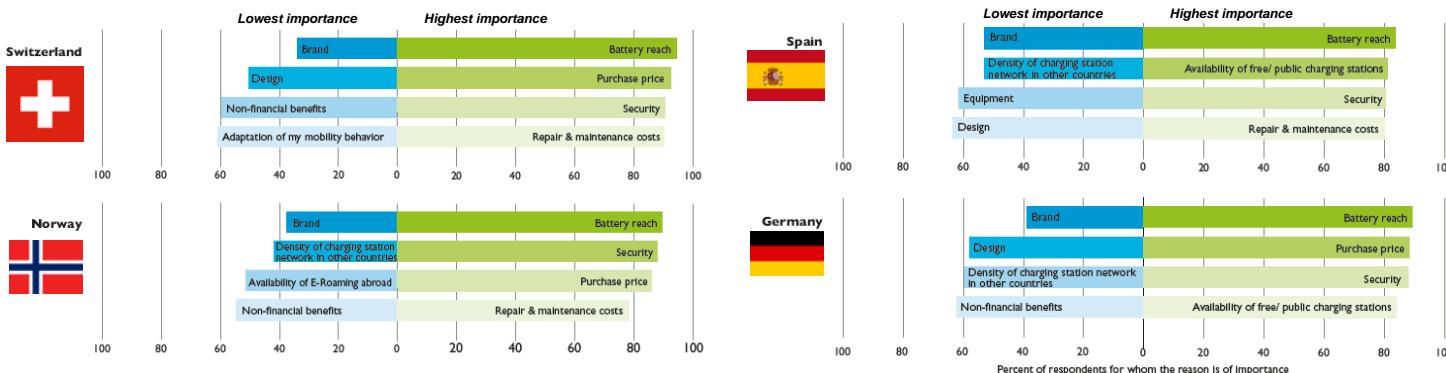


# CUSTOMER ACCEPTANCE OF E-MOBILITY: SURVEY RESULTS FROM SWITZERLAND, NORWAY, GERMANY AND SPAIN

KEY INSIGHTS	SURVEY 1	SURVEY 2
<ul style="list-style-type: none"> <li>Factors of key importance across all countries are: Battery reach, charging infrastructure, the price of the purchase, repair and maintenance costs, as well as security.</li> <li>Respondents from Spain and from Germany consider the availability of free/public charging stations as important determinant in their decision to purchase an electric vehicle.</li> <li>Potential buyers can imagine an adaptation of their own mobility behavior (in Switzerland: 60.9%; in Norway: 69.7%; in Spain: 66.5%; in Germany: 64%).</li> <li>Non-financial benefits (e.g. free parking free use of bus lanes) are of lower priority.</li> <li>The density of the charging infrastructure in the home country is of great importance.</li> <li>The density of charging station networks abroad, as well as E-Roaming abroad are among the lowest priorities.</li> </ul>	<ul style="list-style-type: none"> <li>830 respondents from 4 countries: Switzerland 210; Norway 211; Spain 203; Germany 206.</li> <li>Data was collected btw. May and June 2017 by respondi AG in Switzerland, Spain and Germany, and by Norstat in Norway.</li> <li>Respondents selected of this study met at least one of four conditions: 1. they own a renewable energy installation (e.g. solar panel, heat pump, wind, biomass, battery), 2. they own an electric vehicle, 3. they gathered information on at least one of the renewable energy installations within the last 12 months, 4. they gathered information on electric vehicles within the last 12 months.</li> <li>The sample is representative of gender (53% female respondents), living area (rural 39%; sub-urban 32%; urban 29%). Respondents are at least co-responsible for the financial concerns in the household.</li> <li>88% of the respondents own at least a flat or a house (95% in Germany; 94% in Switzerland; 84% in Norway and 80% in Spain).</li> <li>Average age of the respondents is 36 years (34 years in Germany; 37 years in Switzerland; 33 years in Norway; 40 years in Spain).</li> </ul> 	<ul style="list-style-type: none"> <li>1'021 Swiss respondents aged 16 to 74, residing in the German- and French-speaking parts of Switzerland.</li> <li>Data was collected in January and February 2017. The sample was drawn from the B2C online panel of intervista AG.</li> <li>The sample is representative for gender (51% women) and education, with 32% of respondents having obtained a higher education degree.</li> <li>Geographically, the sample corresponds to the distribution of the overall population among the German and French-speaking regions of Switzerland. 25% of respondents reside in Western Switzerland, 24% in Alpine/Pre-Alpine regions, 22% in the Western Midlands and 29% in the Eastern Midlands.</li> <li>The sample is representative for political orientation according to the results of the latest national elections.</li> </ul> 

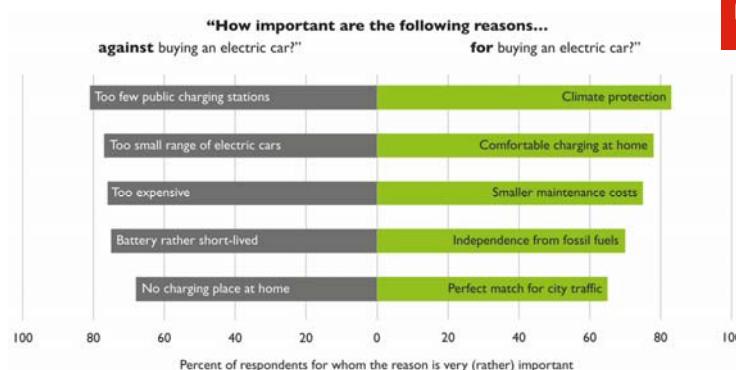
## KEY RESULTS STUDY 1

### • IMPORTANCE OF FACTORS FOR PURCHASING AN ELECTRIC CAR

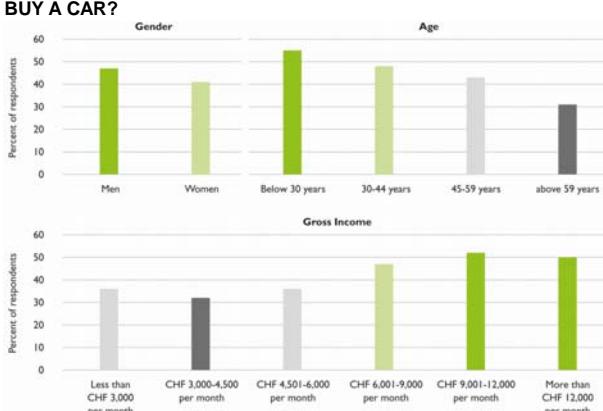


## KEY RESULTS STUDY 2

### • IMPORTANCE OF FACTORS FOR PURCHASING AN ELECTRIC CAR



### • COULD YOU IMAGINE TO CHOOSE AN ELECTRIC CAR NEXT TIME YOU BUY A CAR?



## KEY IMPLICATIONS



44% of the respondents could imagine their next car to be electric

Pre-purchase perception contrasts with studies of post-purchase driver behavior in countries with high penetration of electric cars (e.g. in Norway, 83% of charging is actually done at home).

Overall, adoption rates may change as battery technology develops towards longer driving range, and as purchase prices fall (with decreasing battery costs and greater economies of scale).

In Switzerland, a tax incentive is perceived as a more effective way to support the diffusion of electric mobility, than a cash bonus.