



escalent

EVForward®

Predicting the next
generation of EV
buyers just got real

2026 U.S. Core Study

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Analysis relies on data from primary research and third-party sources deemed to be reliable. Although believed to be accurate, this information is not guaranteed.

Methodology

EVForward has the following sample quotas to ensure accurate market representation

01 Demographics: age, gender, and ethnicity for new car buyers

02 Geography: by U.S. state

03 Vehicle ownership by segment with actual counts:

Segment	2026
Total Sample	n=10,026
Total Mainstream Owners	n=8,499
C Pick-up Truck	n=367
D Pick-up Truck	n=761
Mainstream A/B Car	n=134
Mainstream C Car	n=898
Mainstream D/E Car	n=1,151
Sport	n=166
Minivan	n=188
Mainstream B SUV	n=437
Mainstream C SUV	n=2,518
Mainstream D SUV	n=1,534
Mainstream E SUV	n=345

Segment	2026
Total Luxury Owners	n=1,527
Luxury C Car	n=55
Luxury D Car	n=230
Luxury E Car	n=208
Luxury C SUV	n=184
Luxury D SUV	n=337
Luxury E SUV	n=513
Total Alt. Powertrain Owners	n=2,398
BEV (w/Tesla)	n=904
PHEV	n=250
HEV	n=1,239
FCEV	n=4
EREV	n=1

25 Minute Online Survey

2026 Qualifications:

- U.S. market only (quotas by state)
- Age 18-80 years old
- Must not work in market research, automotive, or for an electric utility company
- Primary vehicle household must be MY2020 or newer
- Must have had an active role in the purchase/lease decision
- Intend new vehicle within 5 years

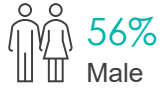
2026 Fieldwork:

- January 2025 – December 2025
- Recruited monthly (n=~840)
- Updated vehicle list

2026 Data Weighted:

- By segment, powertrain, brand, state, age, gender, race & Hispanic

Sample



56%

Male

GENDER



<35

16%

35-54

37%

55+

47%

AGE

23%

West

18%

North-Central

21%

North-East

16%

South – Central

22%

South-East

REGION

STATES (EV REGISTRATIONS RANK* & % OF SAMPLE)

California	Florida	Texas	Washington	New Jersey	Rest:
#1	#2	#3	#4	#5	
12%	9%	10%	2%	4%	59%

Center of large city 16%

Suburb of large city 49%

Smaller city 12%

Smaller town 10%

Rural/Countryside 12%



NEIGHBORHOOD TYPE



Median Income

\$99,884

INCOME



Bachelors Degree+ 60%

EDUCATION



Married

67%

MARITAL STATUS



1 20%

2 62%

3 or more 18%

ADULTS IN HOUSEHOLD



No Children in Household 64%

Children over 18, no longer at home 51%

CHILDREN



Working At Least Part-Time 66%

Retired 27%

WORK



White 78%

African-American 11%

Hispanic Descent 16%

ETHNICITY

Algorithm

EVForward Was Created To Identify And Understand The Next Generation Of EV Buyers

Algorithms based on advanced modeling and an extensive dataset serve as EVForward's foundation

- EVForward's core working team consists of several PhD data scientists
- Continual feedback results in an ever-evolving, always improving model

INPUTS

Over 600 data points for each respondent

These provide insight into vehicle opinions, attitudes & values, lifestyle, usage, technology and more

ANALYSIS

Dozens of platforms are created with aggregations of these variables

Combined with vehicle intention and ownership data, we identify characteristics most indicative of EV intention

RESULTS

EVForward Segmentation: rich discriminant personas of the next EV buyers

EVForward Score: a respondent's likelihood of purchasing an EV

EV Intention Group: a respondent's likelihood to adopt a BEV within the next 5 years

DREAMER

EVForward Score

53

EV Open



Current subscribers can use the EVForward Typing Tool in their own custom studies!



Executive Summary →

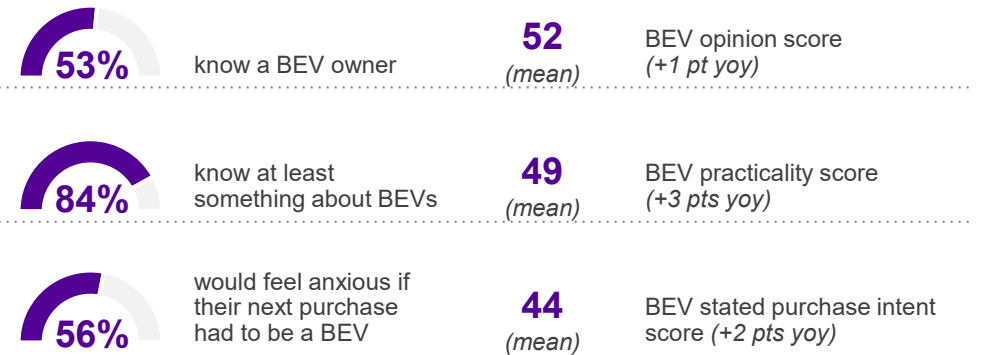
Executive Summary

Uphill Trek Through The Early Majority

- BEVs are now mainstream: over half of buyers know a BEV owner and familiarity is widespread
- Mid and lower funnel scores—opinion, practicality, stated purchase intent—steadily improve, but persistent barriers block adoption. Scores have a lot of room for improvement and hover around mid-range
- BEV sentiment is volatile and highly sensitive to macroeconomics, policy changes, gas price volatility, and trending stories
- Although BEV practicality strengthened in 2026, anxiety if their next purchase had to be a BEV has remained stubbornly high over the years
- Awareness ≠ conversion. In the past, BEV adoption relied heavily on awareness. Now that BEVs are more mainstream, momentum requires education and proven value
- Lacking information, and in some cases misinformation, deepens hesitations. Gaps in perception vs reality across purchase price, the charging experience, home charging costs, public charging access, maintenance costs, battery longevity, and needed range hamper adoption
- Education is important; compelling product is just as important. The early majority is less likely to make concessions to purchase a BEV. Limited or no BEV options in buyer's preferred brands and segments will force them to delay their purchase

Implications

Buyers evaluate BEVs through analytical reasoning rather than emotional impulse. Opinions are shaped by exposure to information and assessing trade-offs to determine if a BEV is “worth it” and makes sense for them. Educate buyers about the realities of owning a BEV, including the charging experience and associated ownership costs



Executive Summary

Affordability Is A Dominant Headwind (And Lever)

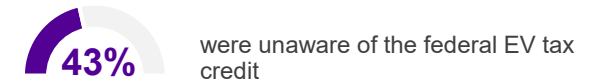
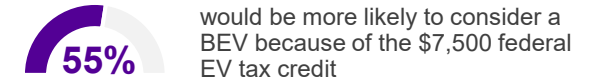
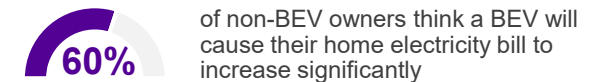
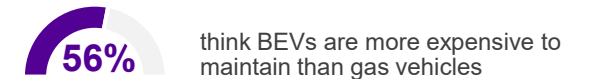
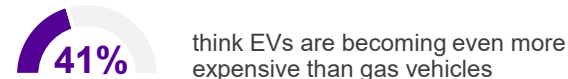
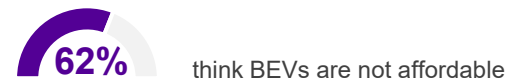
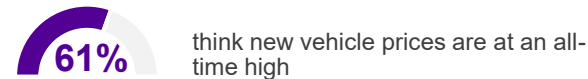
- Affordability is a considerable hurdle for the automotive industry and is amplified for BEVs. New vehicle prices are thought to be at historic highs. On top of that, BEVs carry a visible price premium and many think they are not affordable
- Misperceptions about BEV purchase prices heighten affordability barriers. BEV price premiums compared to a gas vehicle prices is thought to be higher than reality, and this perceive gap is thought to be widening, when in reality prices are becoming more comparable
- Affordability concerns go beyond upfront purchase price and include associated costs and perceived financial risk, including battery replacement costs, expensive maintenance and repairs, home charger installation, and home and public charging costs
- The discontinuation of the federal EV tax credit removed a critical demand lever
- Economic uncertainty (inflation, interest rates, tariffs, war) makes buyers risk averse and impacts their consideration for large purchases

Implications

Make incentives impossible to miss. They meaningfully shift consideration, but only if shoppers are aware of them

Approach BEV affordability as an ecosystem, not just the upfront purchase price. Educate shoppers about lifetime ownership costs and offer options to offset upfront costs

- ▶ Educate buyers about battery longevity, regular maintenance and repair costs, and realistic home and public charging costs to overcome misperceptions
- ▶ Offer longer term financing and flexible lease options. Buyers show interest in 7-year financing
- ▶ Bundle a home charger and installation with the purchase of a BEV
- ▶ Offer battery warranties to reduce perceived risks about battery longevity and replacement



Executive Summary

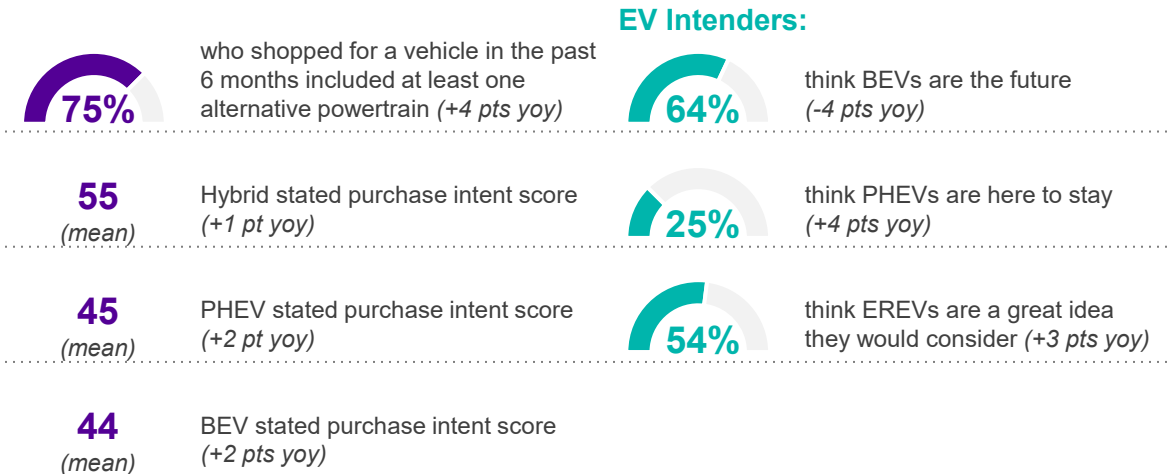
A Future With Multiple Powertrains

- The powertrain market is fragmenting. Buyers are increasingly shopping for and considering an alternative powertrain, but few are focused on BEV only; buyers will cross-shop alternative powertrains
- EV Intenders see BEVs as the future, but are increasingly viewing the future as a mixed-powertrain landscape, with choice between BEV, PHEV, and EREV
- Buyers who are curious but cautious about electrification may opt for a hybrid, PHEV, or EREV instead of a BEV. These powertrains act as a safer middle-ground that allow buyers to access some electrification benefits without forcing them to drastically change their vehicle ownership habits
- The market is made up of various audiences that have different demographics, vehicle priorities, and openness to electrification. They are interested in electrification for different reasons and are at different stages on their electrification journey

Implications

Meet buyers where they are on their electrification journey and work from there. Rather than using one national narrative, buyer segmentation is key to identify and address barriers to adoption that resonate with each audience.

Not all are ready to adopt a BEV now. Treat PHEVs and EREVs as strategic adoption tools, not distractions. Offer a diverse powertrain portfolio that includes a strategic mix of powertrains. The difficult decision for automakers is which powertrains to offer in which segments



Executive Summary

Charging Is a Confidence Problem, Not an Awareness Problem

- Public charging buildout alone is insufficient to drive adoption. Public charger visibility is rising and several concerns are softening, but confidence is lagging
- Buyers more often notice chargers, but don't want to deal with the perceived hassle of public charging. They question whether charging access is convenient, reliable, and well-located for their needs
- Required BEV range continues to rise for the 3rd consecutive year. Range anxiety is a proxy for a lack of confidence in the charging experience
- Daily driving and parking habits are conducive for BEV ownership. A lack of confidence stems from longer trips

Implications

Reduce overreliance on range as a psychological safety net by making charging feel manageable, predictable, and convenient

- ▶ Educate buyers about how rarely public charging is used. Emphasize real-world range adequacy for daily needs
- ▶ Bundle a home charger and installation with the purchase of a BEV to eliminate a daily friction point
- ▶ In addition to showing public charger density, frame the public charging experience is predictable and manageable. Replace abstract infrastructure growth stories with lived experiences
- ▶ Build confidence around longer trips by offering a real-time charging app that shows where to charge, when to stop, how long charging will take, charger availability, and if chargers are in working order

Take ownership of the entire charging experience, not just the vehicle. Partner with charge point operators to establish “certified charging locations”



notice public charging signage or chargers



have one-way commutes less than 50 miles

431 miles
(mean)

required driving range to consider a BEV



park in their garage or driveway

Executive Summary

Priority Segments For BEV Adoption

The following buyer segments show openness to BEVs and would benefit from targeted messaging that aligns with their vehicle priorities:

Midsize/large car intenders	Luxury compact and midsize/large SUV intenders	EV Owners	EV Intenders
Intend a gas or hybrid, but plug-in alternatives are close behind, including BEV. Affordability concerns are front and center so value propositions will be key to adoption	Higher household income, interest in new technology, enthusiasm about cars, and familiarity with plug-in powertrains translates to strong intention for alternative powertrains, including BEV	Care about performance, and in-vehicle and powertrain technology. Will likely buy another BEV but still expect technology advancements, more appealing offerings, and improvements to public charging	Associated BEV costs are concerning, so lead with cost savings and pre-owned offerings with assurances. Will likely cross-shop alternative powertrains, so BEV concerns could push them to another alternative powertrain
Trailblazers	Altruists	Techies	Dreamers
Performance-driven early adopters who see BEV as the future and believe current capabilities fit their needs. Drawn to BEVs for technology and environmental benefits rather than cost or practicality	BEVs are in their consideration set due to environmental benefits and operating cost savings, but barriers temper full commitment. Use long-term value coupled with convenience and environmental benefits to draw in this audience	Tech-forward, in the early majority, and care about style. Technology and the convenience of avoiding routine gas stations visits are key draws to a BEV, but capabilities seem to fall short	Want a vehicle that stands out but are constrained by price. Their appeal for a BEV is in long-term savings through lower operating and maintenance costs, making value-focused messaging critical to overcoming upfront price concerns

Executive Summary

The Story Of 2026 Is Not BEV Rejection, It's BEV Hesitation

BEVs are no longer unfamiliar; they are under scrutiny. The automakers that win next will:

- Combat misinformation that fuels perception vs reality gaps
- Solve confidence gaps, not awareness gaps
- Compete on perceived value and risk reduction
- Embrace the “messy middle” of electrification and make strategic decisions about which electrified powertrains to introduce into which segments
- Use audience segmentation to meet buyers where they are on their electrification journey and address barriers to adoption





Macroeconomic Context →

Economic Outlook & New Vehicle Spend

Economic Uncertainty Tightens Budgets

Affordability concerns intensify during periods of economic uncertainty.

When asked in March 2025, consumers were split between uncertainty, confidence, and skepticism about the U.S. economy and prospects for 2025. These economic sentiments can cause buyers to be more risk-averse and less likely to make larger purchases.

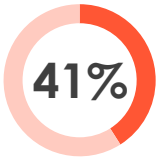
Consumers confident in the U.S. economy expect to spend more on their next vehicle, while those who

are uncertain or skeptical are far more likely to cap their spending at a lower threshold.

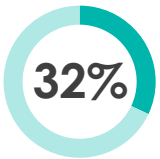
Heading into the 2026 calendar year, growing economic uncertainty—high inflation and interest rates, spikes in gas prices, war in Iran—will likely sharpen affordability concerns, making BEV price premiums harder for buyers to justify. This requires automakers to prove value, reduce perceived financial risk, and give buyers compelling reasons to purchase now rather than wait.

Feeling when thinking about the U.S. economy and the prospects for 2025

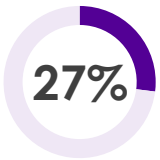
Uncertain



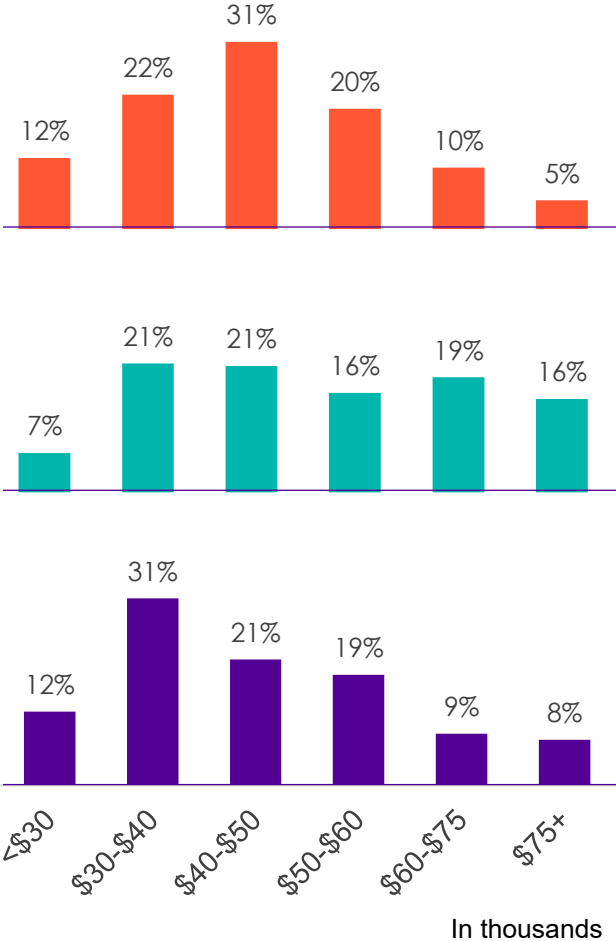
Confident



Skeptical



EXPECTED SPEND ON NEW VEHICLE



U.S. Tariff Policy

Consumers Expect Tariff Burden

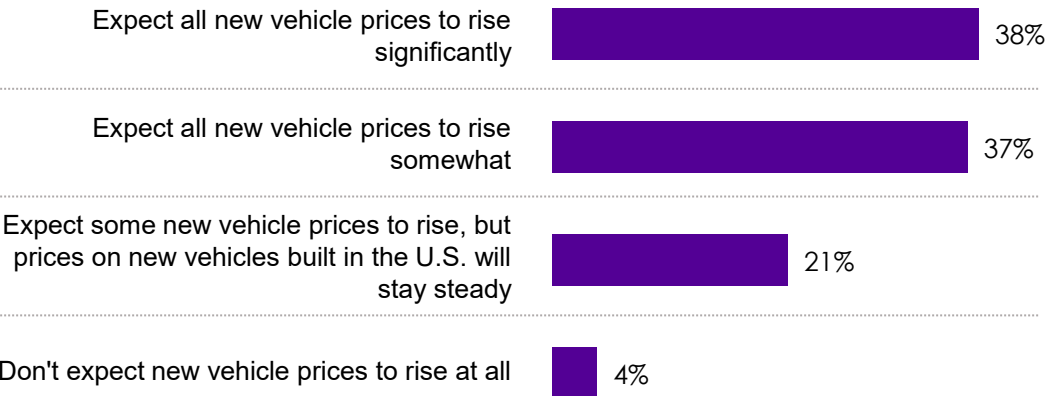
Early 2025, the Trump administration repeatedly announced, revised, and rolled back tariff plans, creating significant uncertainty across global trade and especially within the U.S. automotive industry. The rapid and shifting policies caused uncertainty for buyers.

In response to tariff announcements, buyers expected price hikes. After presenting this news, the majority said they would expect price increases

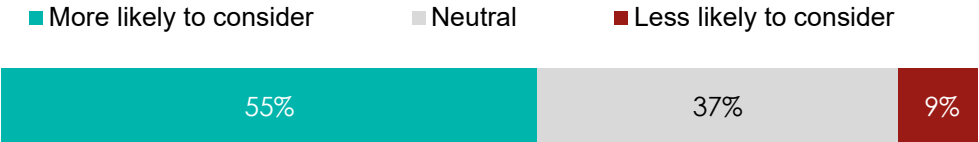
across all new vehicles regardless of origin, recognizing that even U.S.-made vehicles would be affected. Only a small minority expected prices to stay the same despite tariffs.

With tariffs targeting Canada, Mexico, and China, all key players in the automotive supply chain, consumer sentiment shifted in favor of U.S.-manufactured vehicles. Over half said they'd be likely to consider a domestic-made vehicle.

HOW WILL AUTOMAKERS WILL REACT TO TARIFF ANNOUNCEMENTS?



LIKELIHOOD TO BUY A NEW VEHICLE FROM AN AUTOMAKER THAT MANUFACTURES VEHICLES IN THE U.S.



U.S. Tariff Policy

Tariffs Put Strain On Large Purchases

By May 2025, the Trump administration imposed tariffs on dozens of imported goods, ranging from consumer electronics and semiconductors to steel and automobiles.

In May 2025, Escalent asked buyers how they were navigating the new tariff landscape. In response, many showed signs of strain on their planned purchases.

Nearly half said that tariffs had either somewhat or greatly impacted the purchases they had planned for 2025. Regarding the purchase of a new vehicle, many said they would wait to see what

happens with tariffs. Others said they would hold off on a new vehicle purchase altogether.

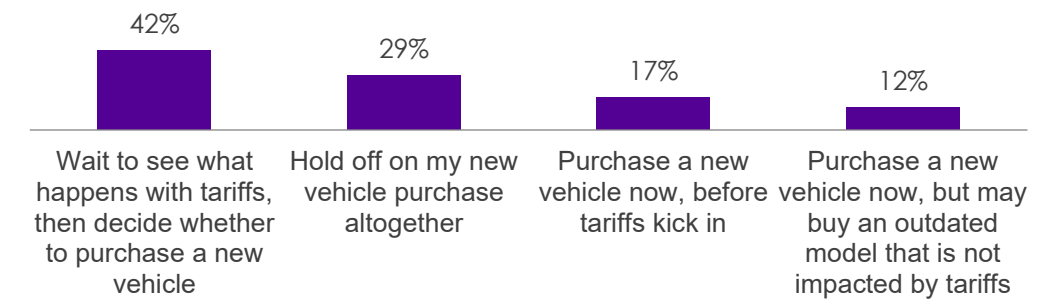
This household-level weariness manifested in skepticism about the health of the automotive industry. Over half said they expected new vehicle sales in 2025 to decrease relative to year's prior.

However, by the end of 2025 new vehicle sales in the U.S. reached a 6-year high according to Cox Automotive. Despite perceptions, the U.S. tariff regime did not lead to a significant drop in new vehicle sales.

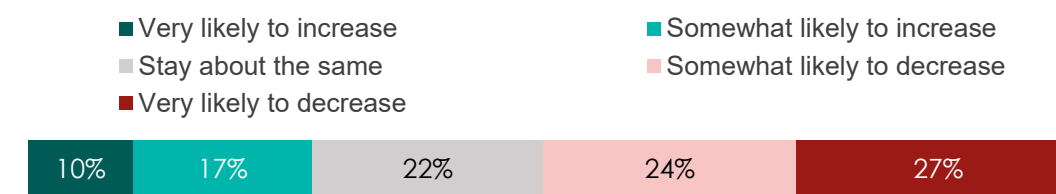
IMPACT THAT TARIFF ANNOUNCEMENTS HAVE ON PLANNED 2025 PURCHASES OVER THE PAST MONTH OR TWO



MOST LIKELY TO DO WHEN THINKING ABOUT A NEW VEHICLE PURCHASE IN 2025



PREDICTED IMPACT THAT TARIFFS WILL HAVE ON U.S. NEW VEHICLE SALES IN 2025 COMPARED TO YEAR'S PRIOR



New Vehicle Spend & Prices

Affordability In A High-Price Market

Expected spend on their next vehicle continues to rise since 2022, and many buyers think that new vehicle prices are at historic highs in 2026.

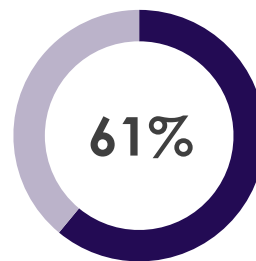
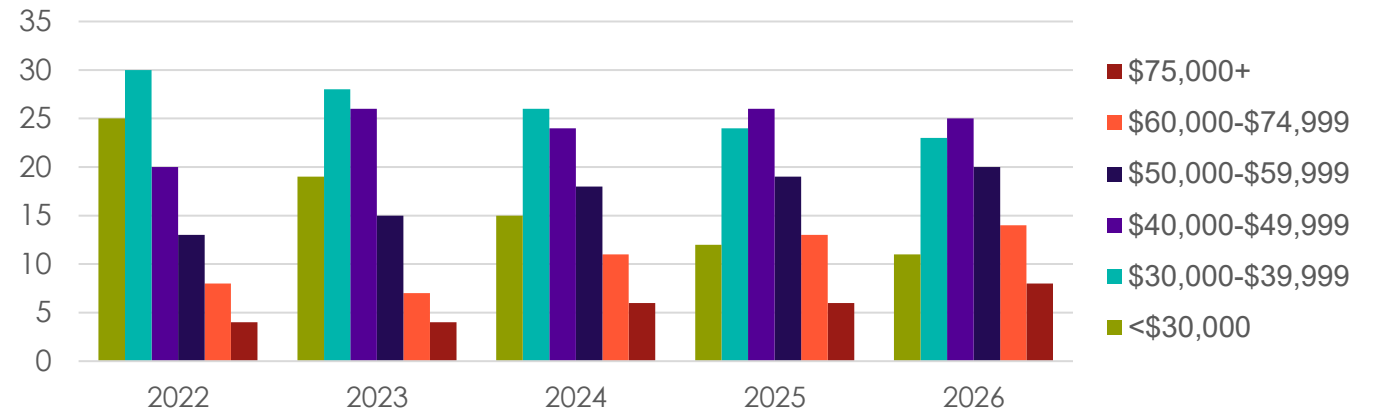
However, there is a contradiction in the market. While many believe new vehicle prices are at an all-time high, most say there are at least some appealing vehicles in their price range. Buyers appear to be increasing their expected spend rather than opting out of a new vehicle purchase.

These affordability concerns are intensified when it comes to a BEV purchase. Associated costs

(i.e., installing a home charger, home and public charging) and perceived financial risks (i.e., battery replacement, expensive repairs) add uncertainty to an already expensive purchase and deter buyers from the powertrain.

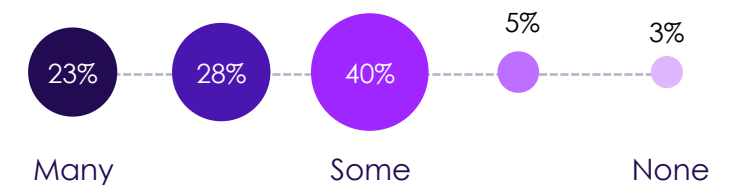
To justify the price premium, a BEV must clearly deliver superior value through its driving experience, charging experience, technology offerings, and lower operating and maintenance costs. At the same time, misconceptions about high costs need to be addressed through consumer education.

EXPECTED SPEND ON NEW VEHICLE



Think new vehicle prices are at an all-time high

FEEL THERE ARE APPEALING CARS IN THEIR PRICE RANGE



Automotive Financing

The Rise Of 7-Year Financing

As a way to generate new sales in an economy where buyers are continuously feeling squeezed, an increasingly greater share of new vehicle purchases are being financed over 7 years. A longer duration loan doesn't appear inherently popular, as most buyers prefer to pay off their loan after 5 years at the longest.

However, when presented with realistic financing packages using real dollar values, buyers' interest in a 7-year loan piques more than initially indicated.

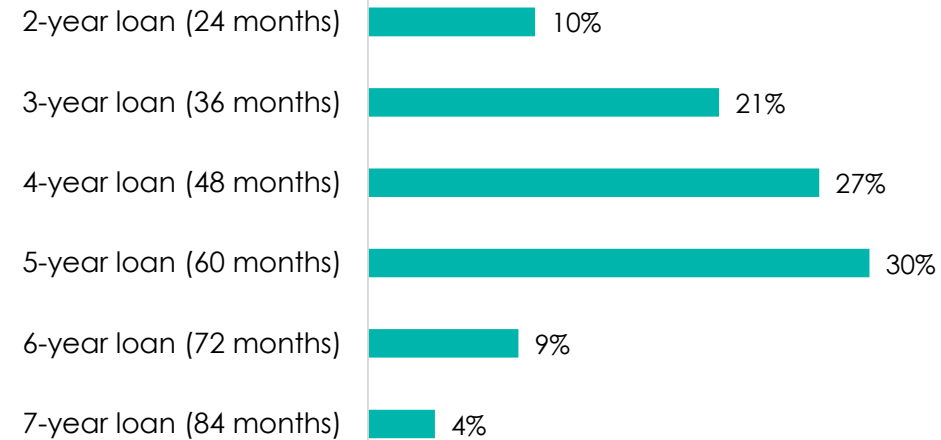
Respondents were shown monthly payments for various financing packages on a \$40,000 loan, each at different interest rates. The 2-year loan had the lowest interest

rate, and the 7-year loan had the highest interest rate. They weren't explicitly told that the longer loans have higher interest rates, but savvy respondents may have interpreted that with some simple math.

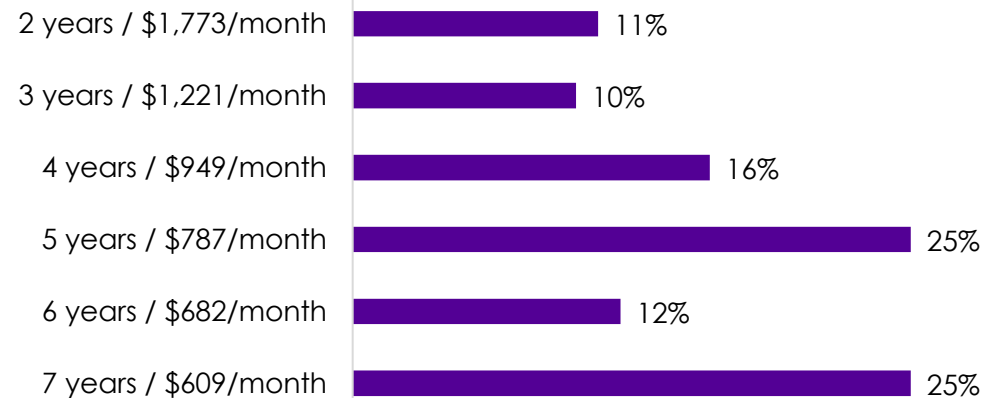
It's likely that many buyers wouldn't care about paying more interest, as long as they can secure a lower monthly payment. Perhaps it's the inherent attractiveness of having a low monthly payment despite having a higher interest rate that is working behind the scenes.

This exercise exemplifies how automakers can promote BEV adoption through affordability levers without lowering sticker prices.

IDEAL LOAN TERM IF FINANCED A NEW VEHICLE



FINANCING PACKAGE PREFERENCE (\$40K FINANCED ON \$50K VEHICLE)





Next Vehicle →

Next Vehicle Attribute Importance

Performance Gains, EV Incentives Soften

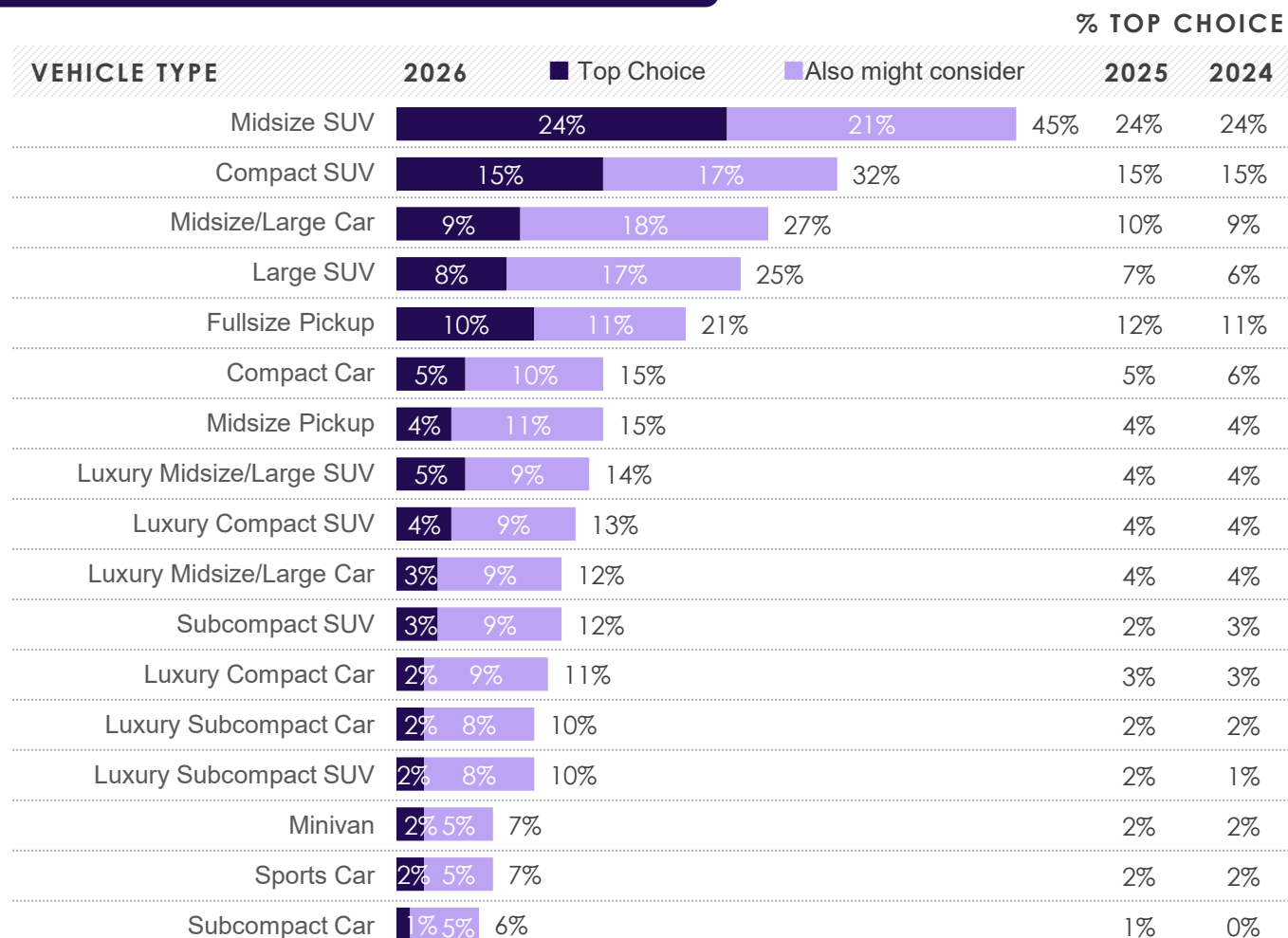
Purchase price has been the most important attribute to new car buyers for the past 3 years. As previously discussed, affordability is a big hurdle for the automotive industry, and this hurdle is amplified when applied to BEVs because they are more expensive than their gas counterparts.

The importance of performance when thinking about their next vehicle purchase has continued to climb since 2024. This uncovers an opportunity to reinforce performance as a strong BEV differentiator. BEV messaging should lean into the advantage of instant torque and power.

EV rebates and tax credits decline 2 pts in 2026, likely reflecting uncertainty around the federal EV tax credit.

ATTRIBUTE	2026	2025	2024
Purchase price	59%	61%	62%
Quality/Reliability/Durability	56%	56%	56%
Safety	47%	47%	46%
Fuel economy	46%	47%	47%
Comfort	43%	44%	43%
Vehicle size	35%	37%	37%
Performance	33%	31%	29%
Maintenance costs	25%	24%	23%
Warranty	25%	24%	25%
All wheel drive	23%	24%	24%
Exterior styling	19%	19%	20%
Innovative in-vehicle technology	17%	16%	16%
Engine type/sound	15%	13%	13%
New engine/powertrain technology	12%	10%	10%
Environmental sustainability	10%	10%	11%
Resale value*	10%	10%	10%
Connected capabilities*	7%	7%	7%
Electric or hydrogen vehicle rebates/tax credits	7%	9%	9%
Self-driving/autonomous features	5%	5%	5%
Towing	5%	6%	6%
Carpool lane access	1%	1%	1%

Next Vehicle Purchase



A Clear Gap in Sedan BEV Offerings

Segment-level purchase intent is stable, reinforcing these segments as priorities for BEV launches. Interest in midsize/large cars remains strong, yet BEV offerings in this segment are limited.

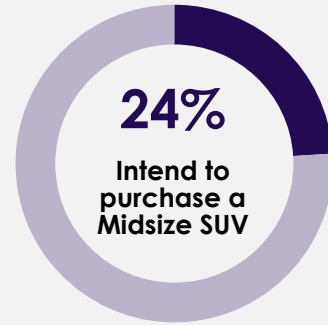
Recent product shifts are reinforcing this gap. The Honda 0 Saloon was discontinued prior to production and production of the Dodge Charger EV was delayed.

Sedan intenders have the

strongest BEV opinion and consideration, meaning there is a market opportunity for the automaker that can fill this segment with compelling product.

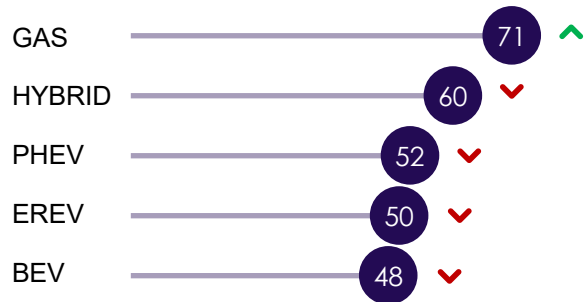
The following slides examine the top three mainstream intended segments and top two luxury intended segments, outlining who these buyers are, what they value, and their openness to different powertrain options.

SEGMENT INTENDER: Midsize SUV

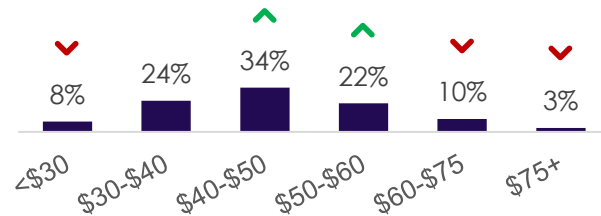


Skew older and female. Less enthusiasm and knowledge about cars may influence their strong preference for gas. Hybrid is the only alternative powertrain that may compete. BEV needs to prove itself; PHEV is preferred to being forced into a BEV; EREV is unknown territory. More often EV Open and EV Resistant. Practicality is important; value traditional vehicle attributes (especially safety and comfort) and don't think an expensive vehicle is a way to reward themselves. Plug-in adoption will likely occur farther in the future, after it has saturated the mass market.

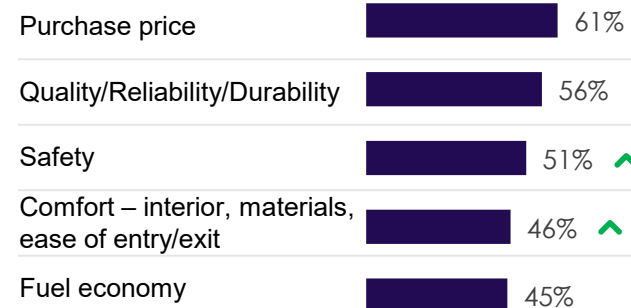
POWERTRAIN INTENTION SCORE



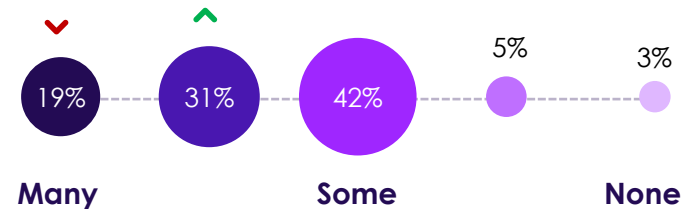
NEXT VEHICLE EXPECTED SPEND In thousands



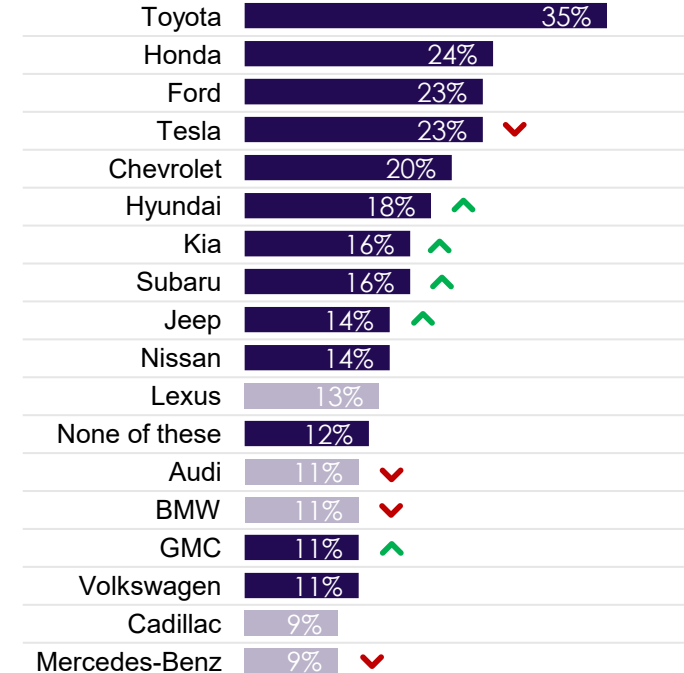
MOST IMPORTANT VEHICLE ATTRIBUTES



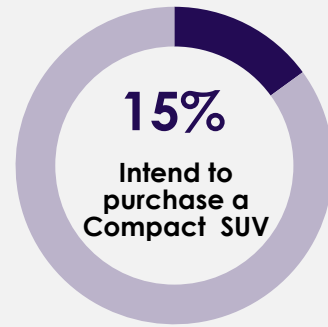
APPEALING CARS IN THEIR PRICE RANGE



BRAND CONSIDERATION

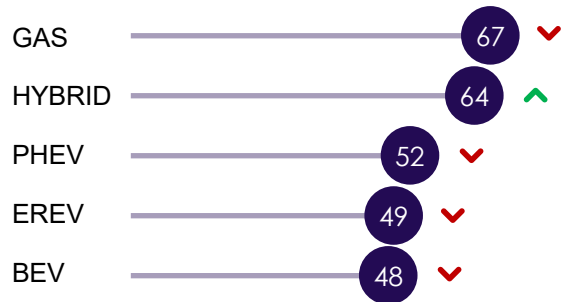


SEGMENT INTENDER: Compact SUV

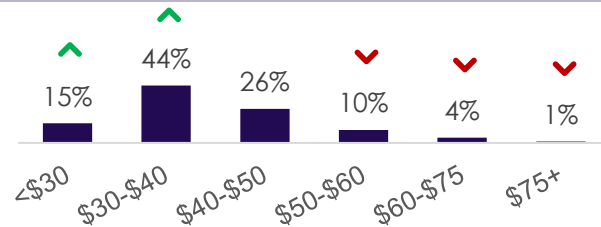


Lower household income and purchase price is important. Expected spend on their next vehicle is lower and less often think there are appealing cars in their price range. Not as tech adventurous; like to hear about others' experiences before trying new products. Prefer tried and trusted brands; Toyota and Honda are top contenders. Will likely purchase gas or hybrid. Plug-in powertrains are not top of mind and less often notice public charging. Purchase price is a strong BEV barrier. With more disposable income in the future, they may size up into a midsize SUV rather than purchasing a compact SUV plug-in.

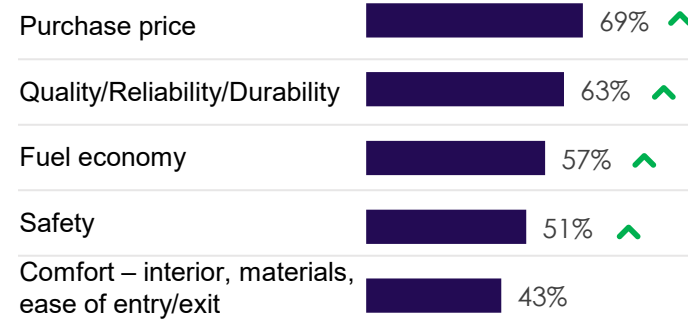
POWERTRAIN INTENTION SCORE



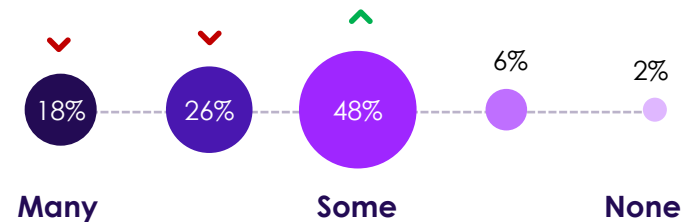
NEXT VEHICLE EXPECTED SPEND In thousands



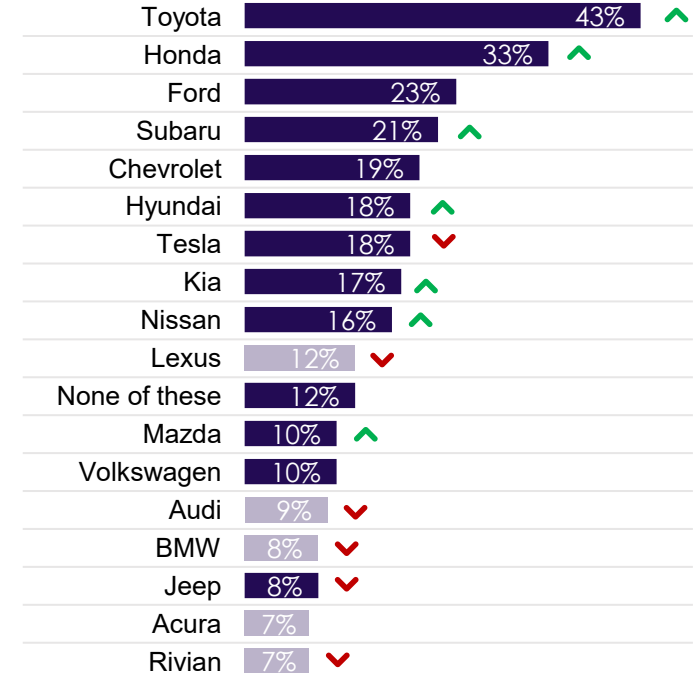
MOST IMPORTANT VEHICLE ATTRIBUTES



APPEALING CARS IN THEIR PRICE RANGE

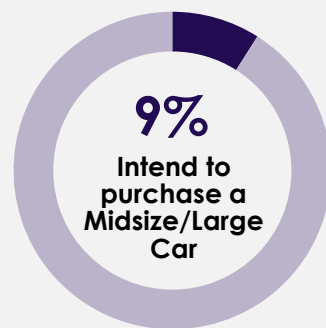


BRAND CONSIDERATION



■ Mainstream
■ Luxury

SEGMENT INTENDER: Midsize/ Large Car

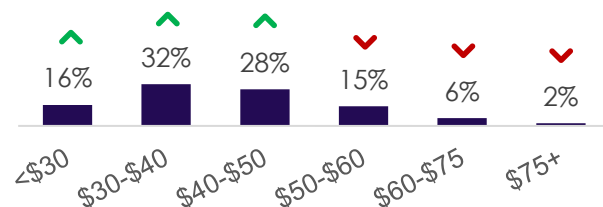


Lower household income and expect to spend in lower-to-mid range on their next vehicle. Purchase price and fuel economy are important. Intend a gas or hybrid, but plug-in alternatives are close behind, including BEV. More often EV Intender. Lower required range to consider a BEV and driving range is a less prevalent BEV barrier. Cost to recharge, cost of repairs/maintenance, and uncertainty about overall value are strong BEV barriers, so value propositions will be key to adoption. This seems to be a strong segment to offer plug-in vehicles now and into the future.

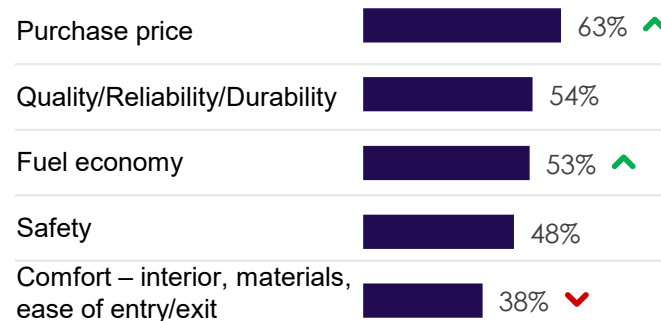
POWERTRAIN INTENTION SCORE



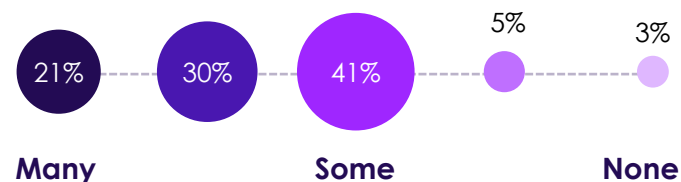
NEXT VEHICLE EXPECTED SPEND In thousands



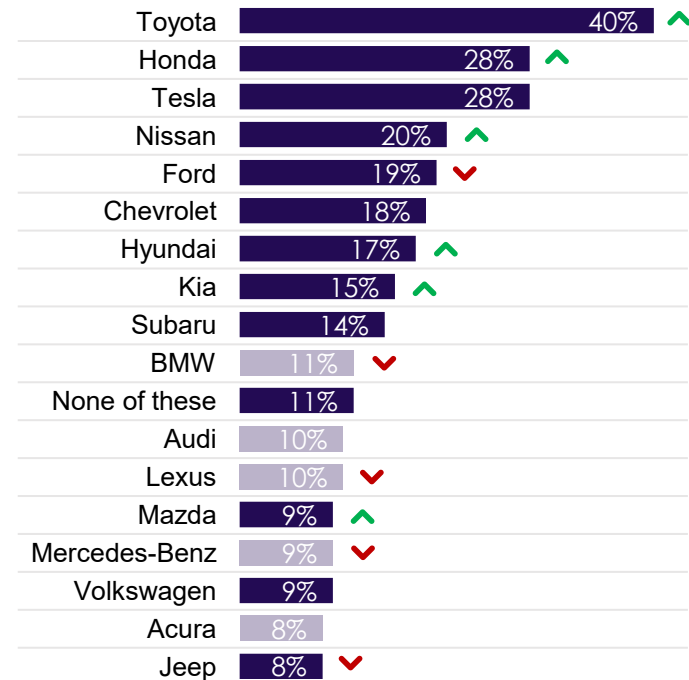
MOST IMPORTANT VEHICLE ATTRIBUTES



APPEALING CARS IN THEIR PRICE RANGE

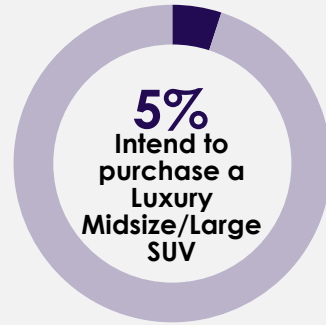


BRAND CONSIDERATION



■ Mainstream
■ Luxury

SEGMENT INTENDER: Luxury Midsize/ Large SUV

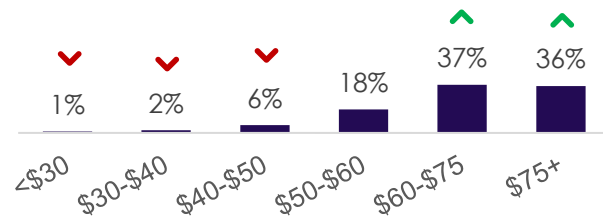


Shorter purchase horizon. Do more research activities, particularly in person like visiting a dealer and test driving. Higher household income; there are many appealing cars in their price range. Car and technology enthusiast. Familiar with and know someone who owns a plug-in powertrain. Strong purchase intention for alternative powertrains and is comparable to gas. Think BEV is practical and is the future, PHEV is here to stay, and EREV is a great idea they would consider. This seems to be a strong segment to offer plug-in vehicles now and into the future.

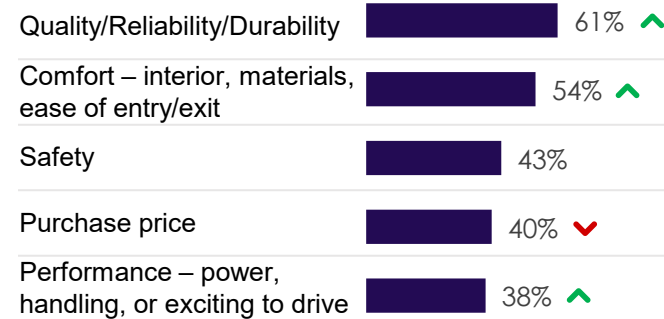
POWERTRAIN INTENTION SCORE



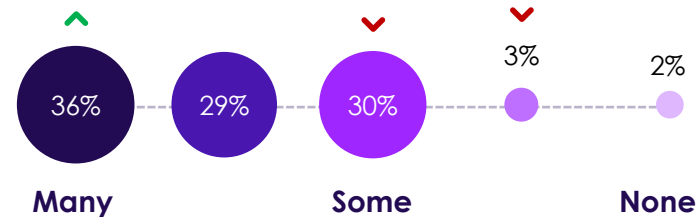
NEXT VEHICLE EXPECTED SPEND In thousands



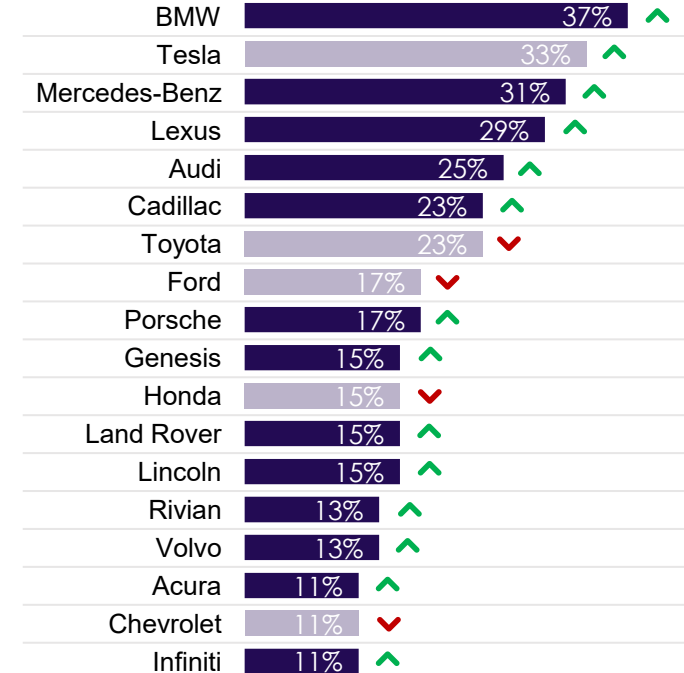
MOST IMPORTANT VEHICLE ATTRIBUTES



APPEALING CARS IN THEIR PRICE RANGE

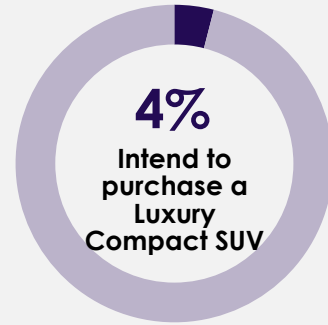


BRAND CONSIDERATION



■ Luxury
■ Mainstream

SEGMENT INTENDER: Luxury Compact SUV

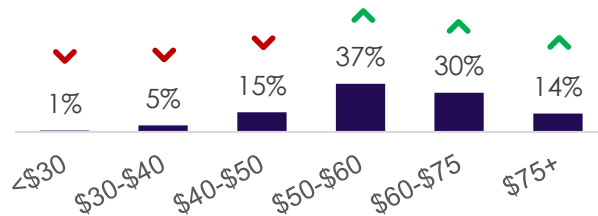


Higher household income and there are appealing cars in their price range. Familiar with plug-in powertrains and know someone who owns PHEV and BEV. Think BEV is practical and is the future, and EREV is a great idea they would consider. Strong intention for alternative powertrains. Like new technology, enthusiastic about cars, and want to drive an environmentally-friendly car. Drawn to BEVs for technology, but hesitant because of charge time. This seems to be a strong segment to offer plug-in vehicles now and into the future.

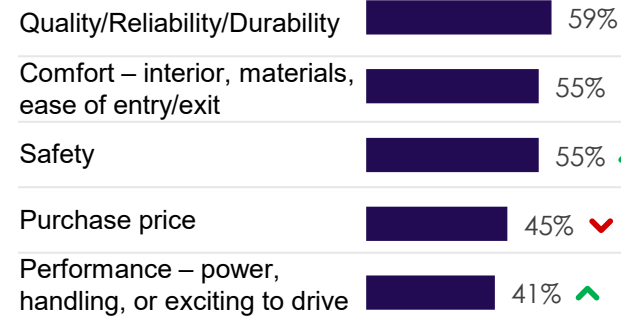
POWERTRAIN INTENTION SCORE



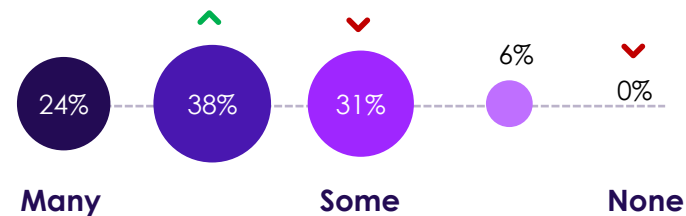
NEXT VEHICLE EXPECTED SPEND In thousands



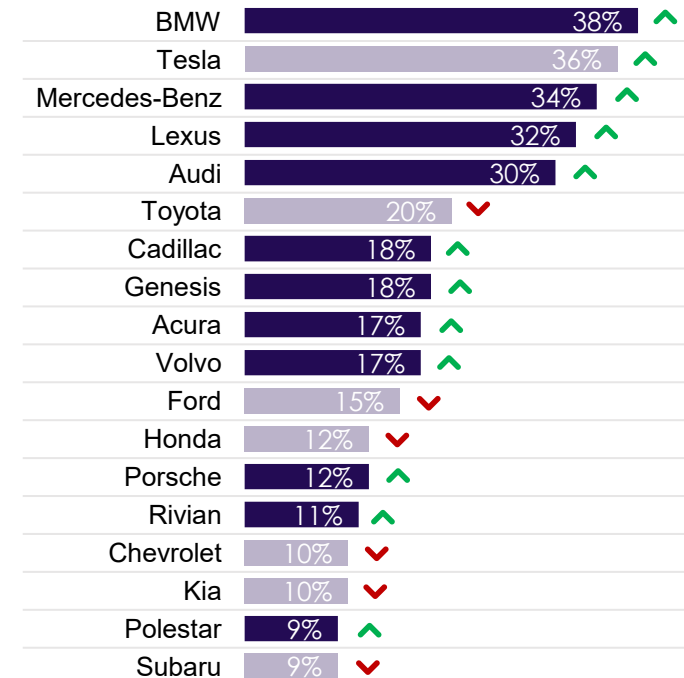
MOST IMPORTANT VEHICLE ATTRIBUTES



APPEALING CARS IN THEIR PRICE RANGE



BRAND CONSIDERATION



Truck Intenders Changing

A New Kind of Truck Intender

A shift in truck intender perceptions appears driven less by changing attitudes among traditional truck buyers and more by a change in the composition of truck intenders.

Compared to 2025, today's truck intenders skew younger, more urban and suburban, more liberal, and show more openness to new technology. They are more often SUV owners rather than current truck owners and more often currently own an alternative powertrain.

As a result, sentiment toward BEVs and other alternative powertrains is warming. 2026 truck intenders increasingly view BEVs as practical and either an interesting idea or one that still needs to prove itself. Intent to

purchase an alternative powertrain among truck intenders rises, while gas intent softens slightly.

This shift in composition may have been caused by interest in battery electric trucks—like F-150 Lightning, Rivian R1T, Silverado EV, Slate, and Cybertruck—from buyers who may not have previously considered a truck at all.

At the same time, product delays and discontinuations, such as Ford discontinuing the F-150 Lightning and delays to the GMC Hummer EV, may further reshape the truck intender segment.

As the segment is redefined, truck intenders are moving out of EV Resistant and into EV Intender and EV Open groups.

TRUCK INTENDER DEMOGRAPHICS	2026	2025 DELTA
Age 18-34	13%	-1
Age 35-54	39%	+4
Age 55-80	49%	-3
Car owner	8%	-1
SUV owner	28%	+3
Truck owner	64%	-2
Alternative powertrain owner	20%	+2
Conservative skew	47%	-3
Liberal skew	17%	+2
Usually try new products before others do	23%	+3
Feel more comfortable using familiar brands and products	41%	-4
Centre/suburb of large city	51%	+4
Rural/countryside	22%	-3
TRUCK INTENDER POWERTRAIN PERCEPTIONS		
BEV is future	26%	-1
BEV is interesting idea	44%	+3
BEV has to prove itself	18%	+2
BEV is stupid idea	11%	-4
EV Owner	5%	0
EV Intender	23%	+3
EV Open	29%	+4
EV Resistant	43%	-7
Hybrid sentiment more positive	42%	+5
PHEV sentiment more positive	32%	+4
BEV sentiment more positive	31%	+2
BEV practicality (mean)	42	+7
Gas purchase intention (mean)	76	-1
Hybrid purchase intention (mean)	56	+3
PHEV purchase intention (mean)	48	+4
BEV purchase intention (mean)	45	+4



Powertrain Sentiment →

Familiarity & Exposure

From Niche To Normal

Familiarity and real-world exposure to BEVs and PHEVs has increased over time, but momentum has stalled over the past couple years.

Knowing someone who owns a BEV rose steadily since EVForward launched in 2020 and then plateaued in 2025. PHEV follows a similar trend.

Roughly half of new car buyers now know someone who owns a BEV, meaning exposure to the powertrain has moved well outside of early adopter circles.

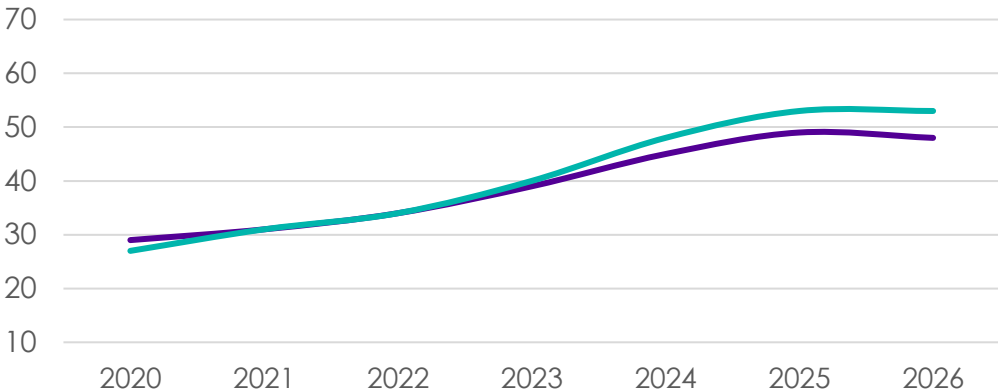
BEV familiarity experienced rapid growth from 2022 to 2024 and

then leveled off. PHEV familiarity growth is more linear.

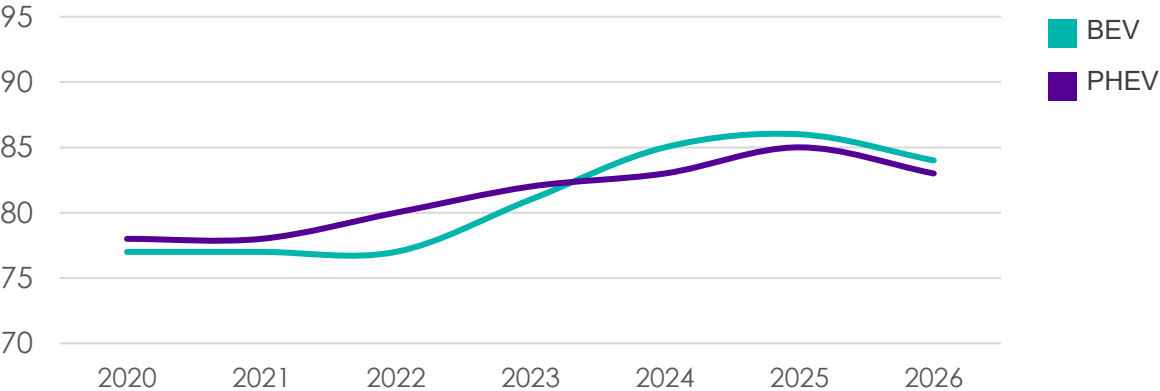
Familiarity and real-world exposure are necessary precursors to adoption, but they are not sufficient on their own. They generate curiosity about and openness to alternative powertrains, but do not seal the deal.

To support BEV adoption, automakers must understand where different audience groups are on their electrification journey, decide which audiences to prioritize, and address barriers that are holding them back.

KNOW SOMEONE WHO OWNS POWERTRAIN (A FEW, MANY)



FAMILIARITY (DROVE, KNOW WELL, KNOW SOMETHING)



Opinion & Sentiment Change

BEV Enthusiasm With Friction

Gas opinion has been consistently strong since 2020. Buyers are gradually warming to electrified powertrains, but momentum is modest. To the average buyer, BEVs are still perceived as aspirational, future technology, and day-to-day barriers around costs, range, and charging are easing only at the margins.

BEV net positive sentiment tells a different story. It stalls in 2022 and then fluctuates year to year. And although buyers have the highest opinion of gas, net positive sentiment for the powertrain is relatively low.

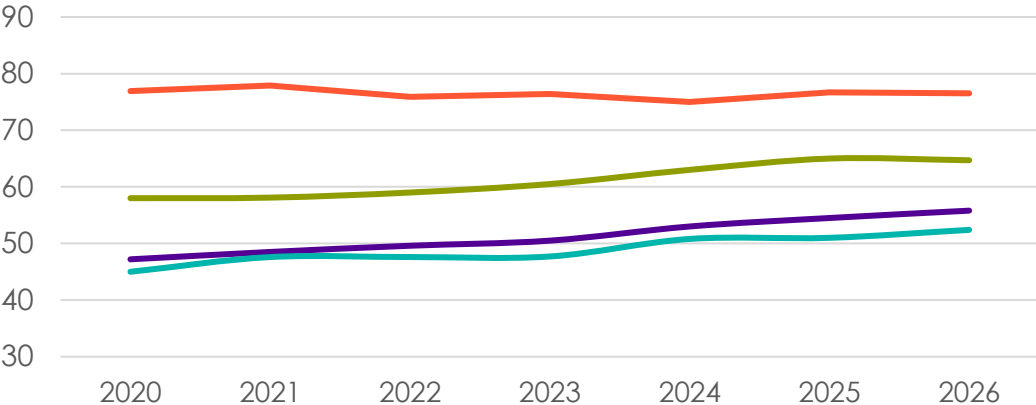
Interestingly, BEV and gas net positive sentiment appear volatile. The two powertrains move in

opposition: when one rises, the other falls. These swings are likely driven by external factors such as fluctuations in gas prices, policy shifts, negative news cycles, or extreme weather events. The following slide maps out macroeconomic events that may have caused swings in BEV and gas net positive sentiment.

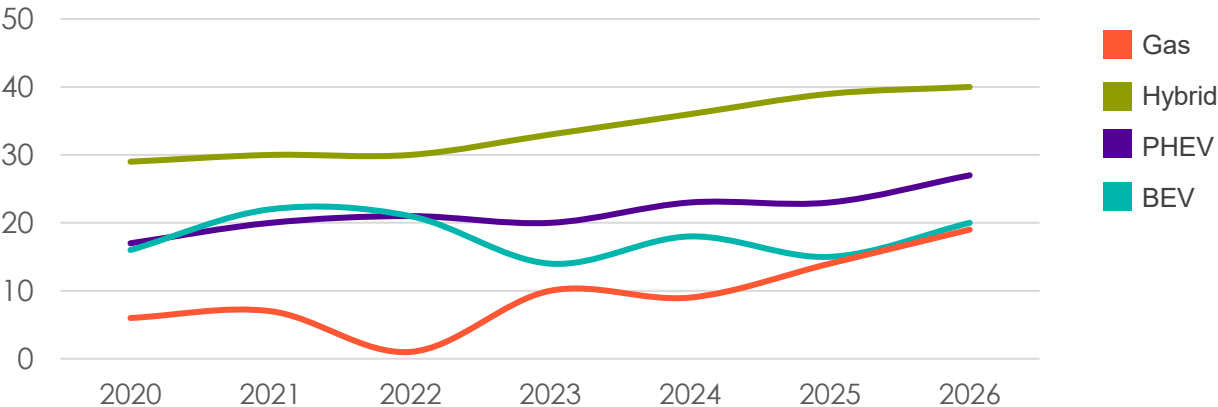
Hybrid and PHEV net positive sentiment is not affected in the same way. Sentiment for these powertrains trends upward over time, reinforcing their position as low-risk electrification options.

In 2026, all powertrains are on an upward trend, with hybrid, PHEV, and gas net positive sentiment at all-time highs.

OPINION (MEAN)

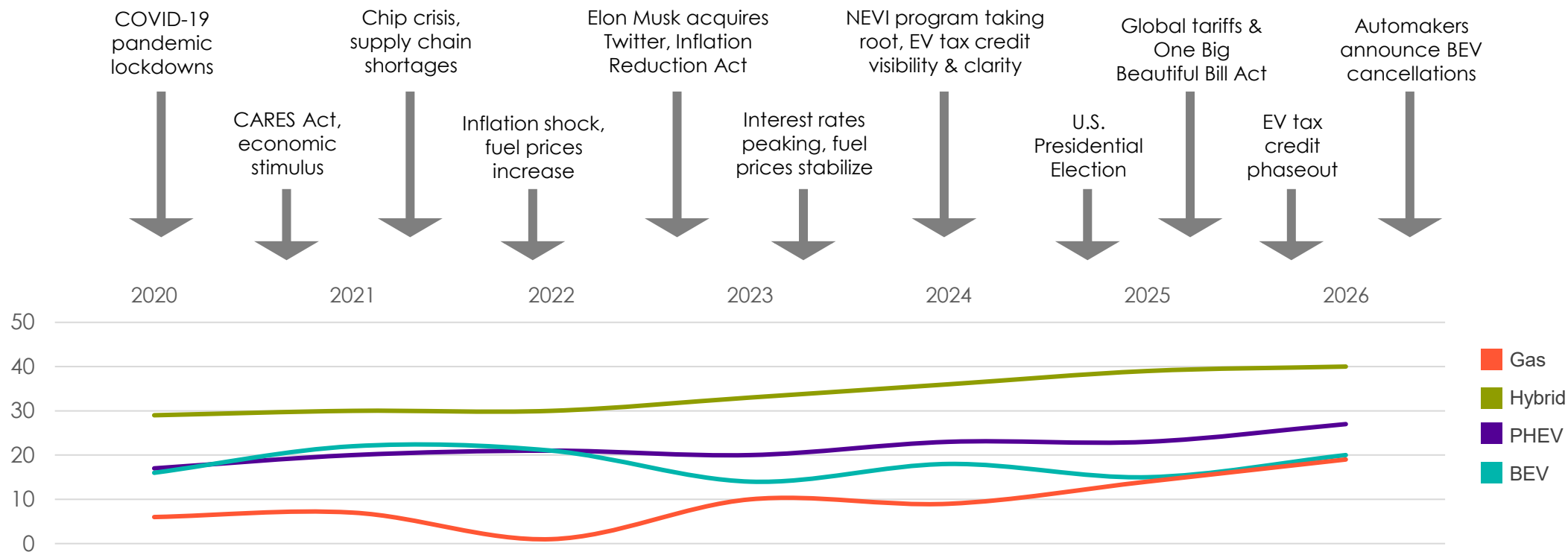


NET POSITIVE SENTIMENT CHANGE



Macroeconomic Environment

NET POSITIVE SENTIMENT CHANGE – MACROECONOMIC FACTORS



Consideration & BEV Interest

The Shift Toward Electrification

Consideration for alternative powertrains continues to steadily rise since 2020, inline with opinion trends. Gas consideration declines until 2024 and then stabilizes over the past three years.

Hybrid remains the dominant alternative powertrain. For the mass market, the path to full electrification may begin with hybrid. These hybrid-first buyers are likely part of the early-to-late majority in the diffusion of innovation. They are not yet ready to commit to a plug-in vehicle, so hybrid is seen as a safe and convenient option because it unlocks some electrification benefits without needing to worrying about plugging-in.

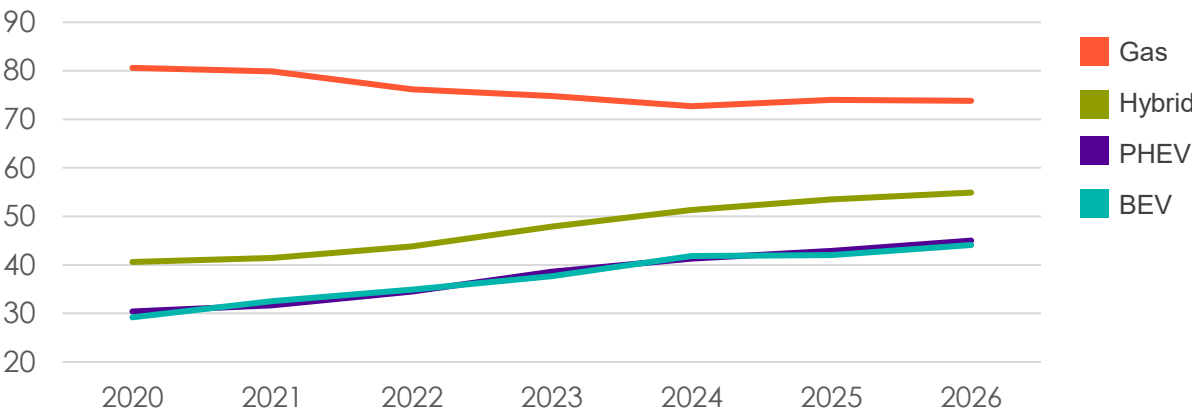
Buyer interest in a BEV as their next vehicle climbs from 2022 to

2024, then levels off over the past three years. “PHEV not BEV” follows a similar trend.

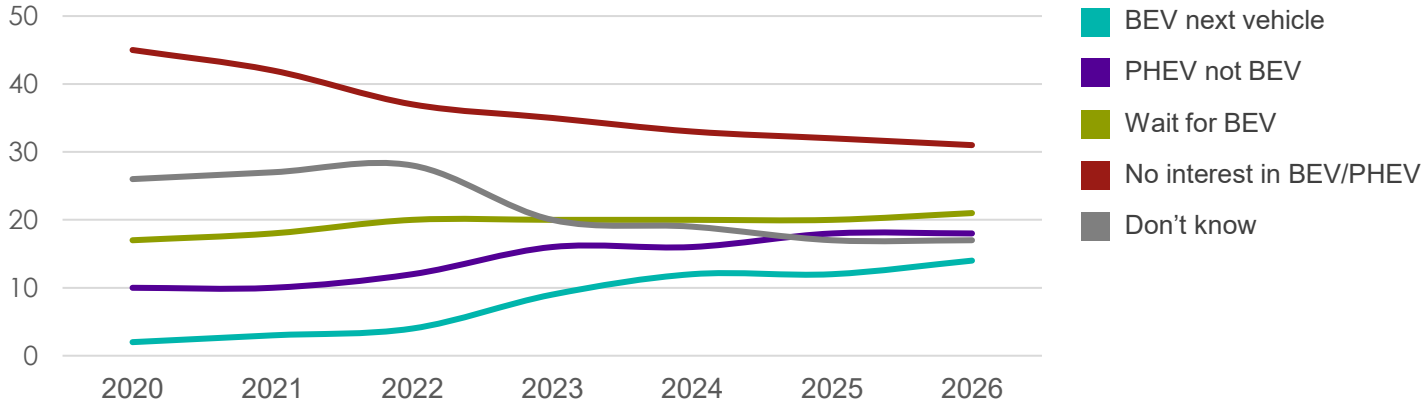
Those waiting on the sidelines for a BEV is relatively consistent over the years, showing a portion of the population that is ready to adopt the powertrain when the capabilities and environment feels right for them.

Rejection of BEVs and PHEVs continues a steady decline since 2020, signaling that electrified powertrains are firmly on consumers’ radar and indeed entering the mass market. At this time, the key challenge of electrification is less about awareness of alternative powertrains and more about when and how consumers will make the switch.

CONSIDERATION (MEAN)



BEV INTEREST



Powertrain Perceptions

Bridges To Electrification

Although much less severe, viewing BEV as “the future” roughly tracks with swings in net positive sentiment, suggesting BEV perceptions are also sensitive to macroeconomic events.

Buyers thinking of BEVs as “an interesting idea” has declined slightly since 2020, with an uptick in those viewing the powertrain as a “passing fad” or “stupid idea.” Even so, the majority see BEVs as either the future or an interesting idea.

PHEVs are widely viewed as a credible stepping-stone to full electrification and roughly one in three say they are preferred to being forced into a BEV.

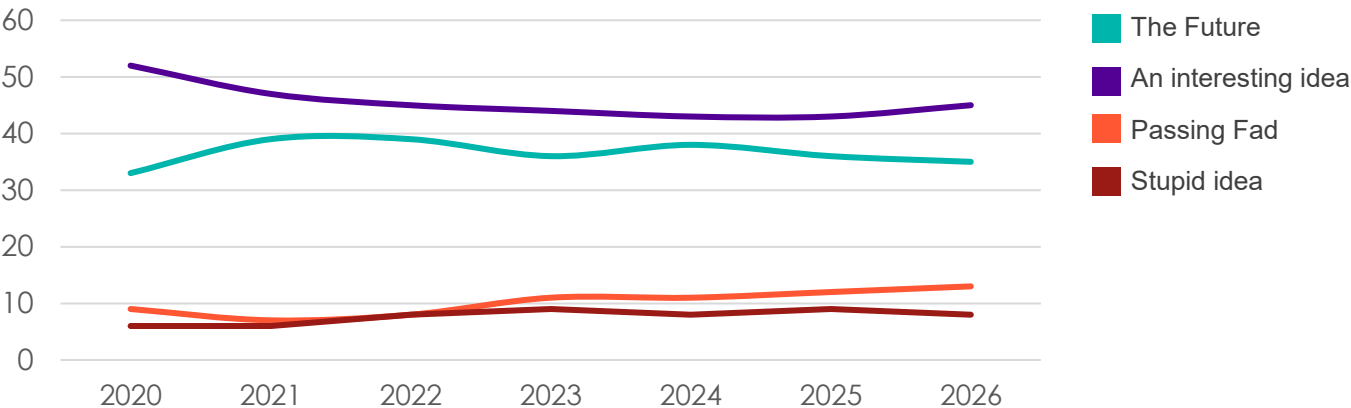
As a newer powertrain,

exposure to and familiarity with EREVs is lower than BEVs and PHEVs, and buyers show a lack of understanding. Nearly half say they are intriguing but want more information.

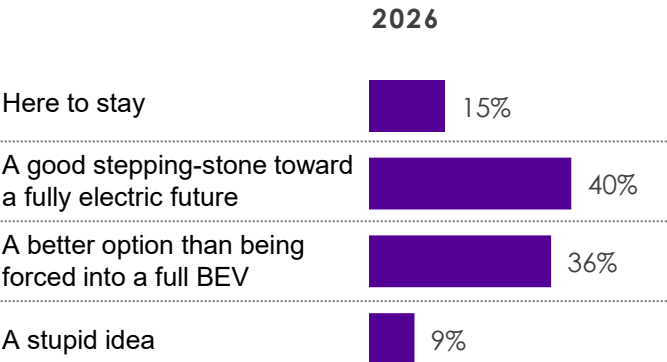
Although familiarity with and exposure to EREV is low, opinion is already on par with BEV and PHEV. It seems that these more established plug-in powertrains paved the way for EREV to enter the market with relatively high opinion.

While BEVs seem to have solid footing in the distant future, PHEVs and EREVs are near-term options that allow buyers who are anxious about range, charging, and other barriers to ease into electrification.

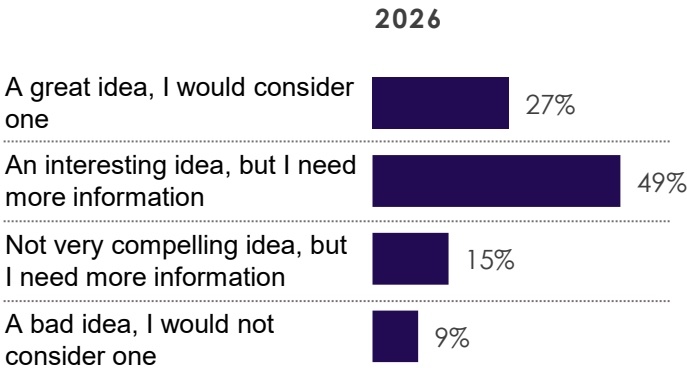
BEV PERCEPTION



PHEV PERCEPTION



EREV PERCEPTION



Powertrain Shopping

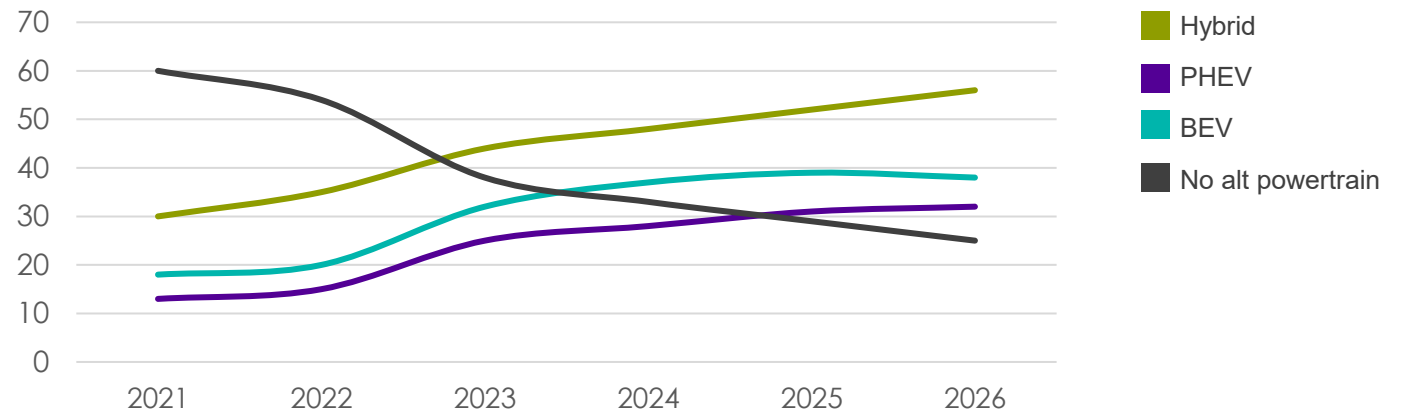
Exploration Of Electrification Expands

Hybrid is a low-risk entry point into electrification, and shopping for the powertrain rises steadily since 2021.

Shopping for plug-in powertrains, both PHEV and BEV, spike in 2023 and continue to grow through 2026.

Most buyers are now at least curiously exploring electrified options. The share of shoppers excluding all alternative powertrains from their shopping process has been declining since 2021. This suggests a breakthrough and normalization of alternative powertrains in the market.

POWERTRAIN SHOPPING (AMONG THOSE WHO HAVE SHOPPED FOR A VEHICLE IN THE PAST 6 MONTHS)





Powertrain Intention →

Cross-Powertrain Intention

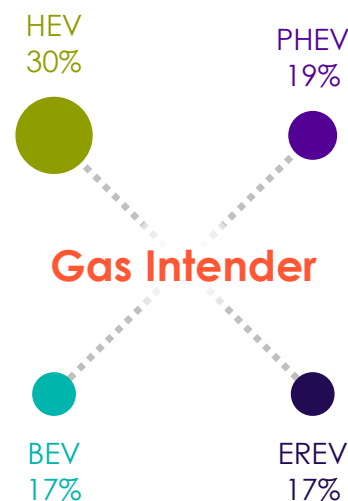
Alternative Powertrain Intenders Cross-Shop

The graphs at right show cross-powertrain purchase intent.

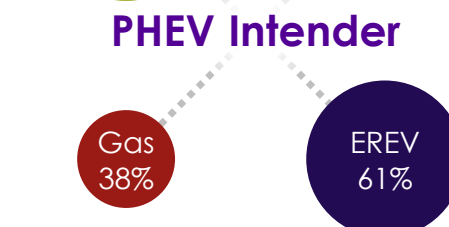
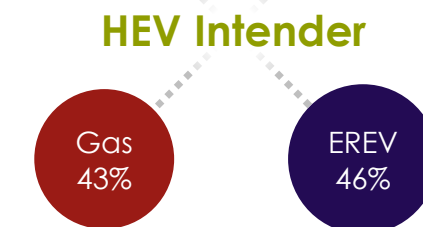
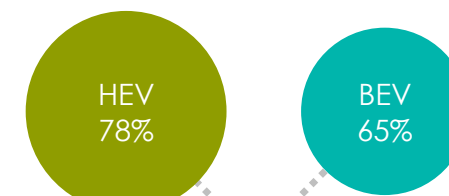
Gas intenders show limited openness to alternative powertrains. Only 30% also intend to purchase a hybrid for their next vehicle, and intent to purchase plug-in powertrains is even lower.

Alternative powertrain intenders behave differently. They show varying degrees of openness to multiple electrified options. While gas remains in their consideration set, alternative powertrains are preferred and consistently outperform gas.

The following slides explore EREV, PHEV, hybrid, and gas intenders, looking at what is important to them when thinking about their next vehicle, and where they are on their electrification journey.



CROSS-POWERTRAIN INTENTION

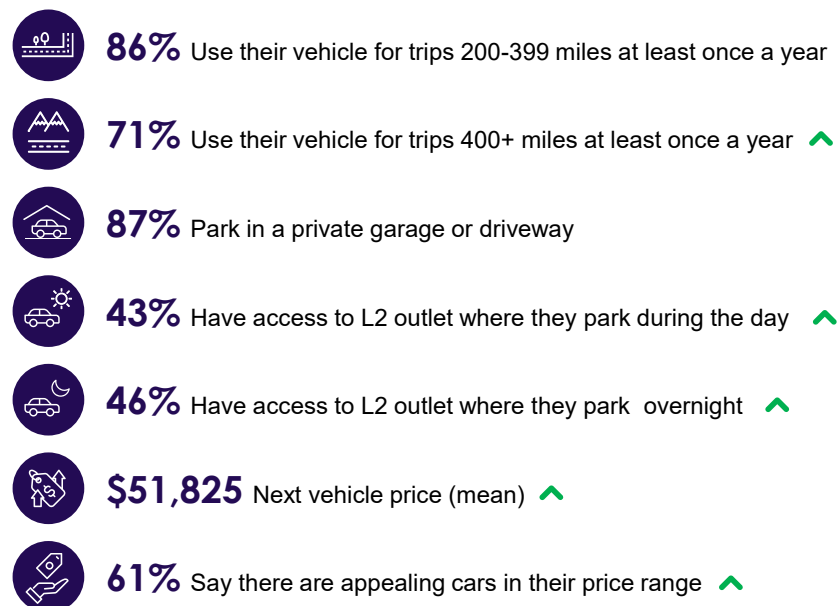


POWERTRAIN INTENDER:

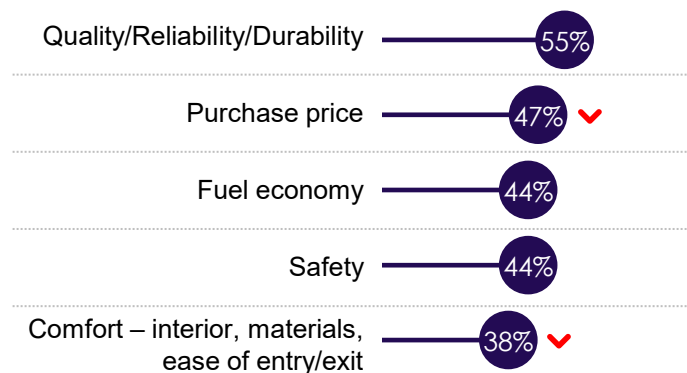
Extended-Range Electric

8% of sample

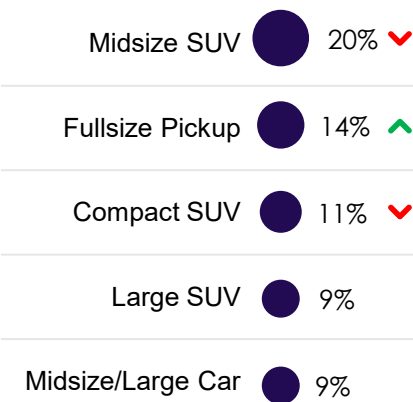
Relatively high price tolerance with higher expected spend on their next vehicle and less importance on purchase price. Prioritize reliability, efficiency, and safety, while strongly motivated by technology and environmental impact. Preferer SUVs and fullsize pickup. Higher share of Trailblazers (eco-conscious, tech-interested) and Dreamers (value and long-term savings focused)



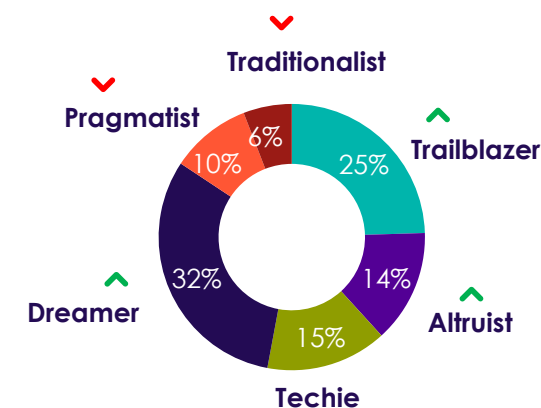
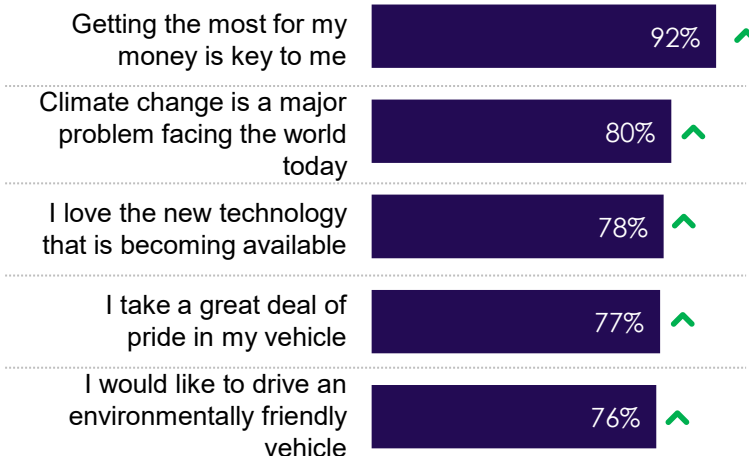
MOST IMPORTANT VEHICLE ATTRIBUTES



NEXT VEHICLE SEGMENT



VEHICLE VALUES

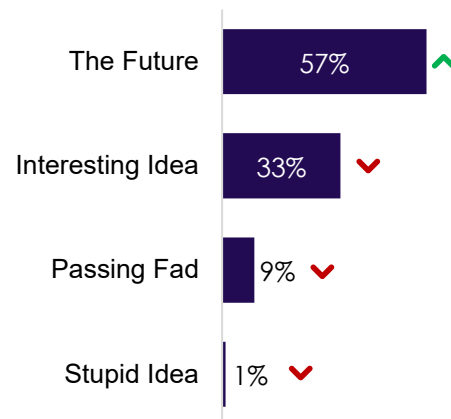


POWERTRAIN INTENDER:

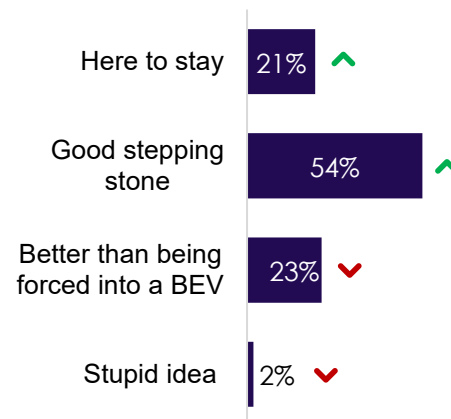
Extended- Range Electric

View electrification positively but pragmatically. See BEVs as the future, yet think PHEVs are a good stepping stone and EREVs are a great idea they would consider. Cost savings and environmental impact are BEV draws, but range, battery uncertainty, and charging (time, access, perceived inconvenience) are key barriers, which drives stronger purchase intent for EREV than another alternative powertrain.

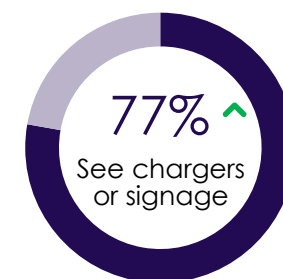
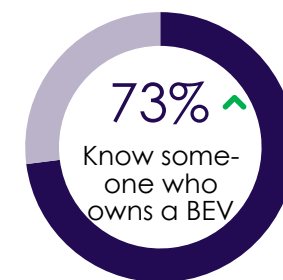
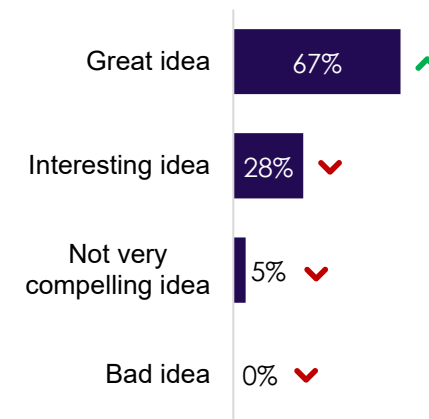
BEV PERCEPTIONS



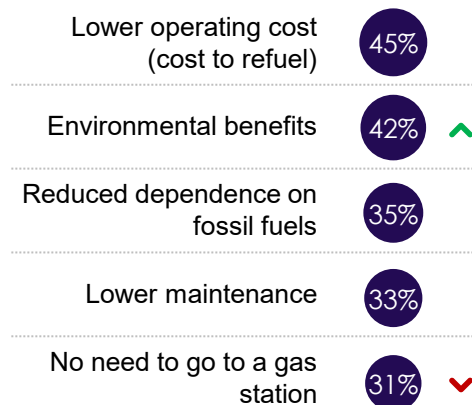
PHEV PERCEPTIONS



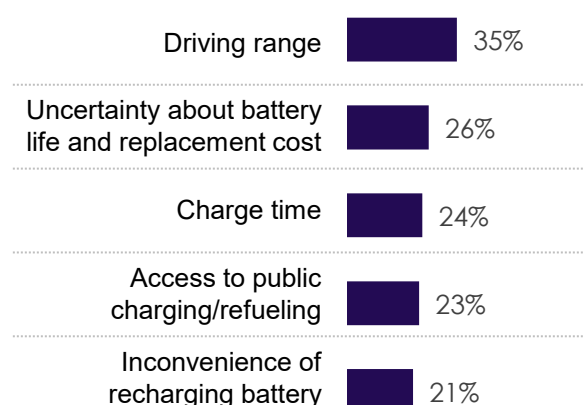
EREV PERCEPTIONS



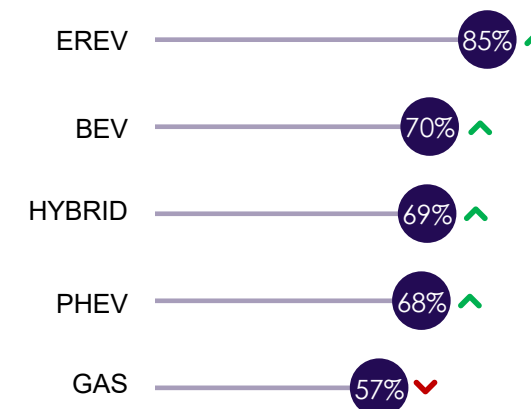
TOP BEV BENEFITS



TOP BEV BARRIERS



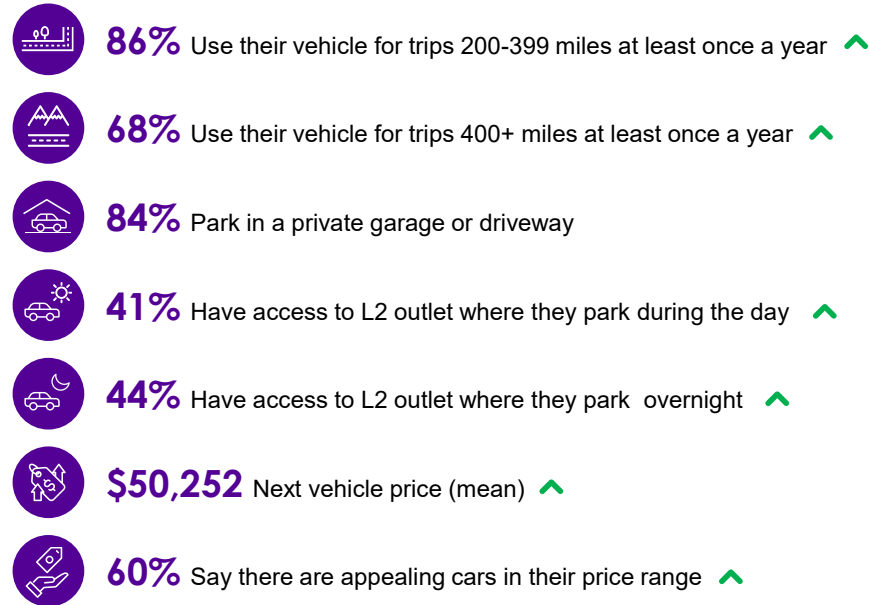
POWERTRAIN INTENTION SCORE



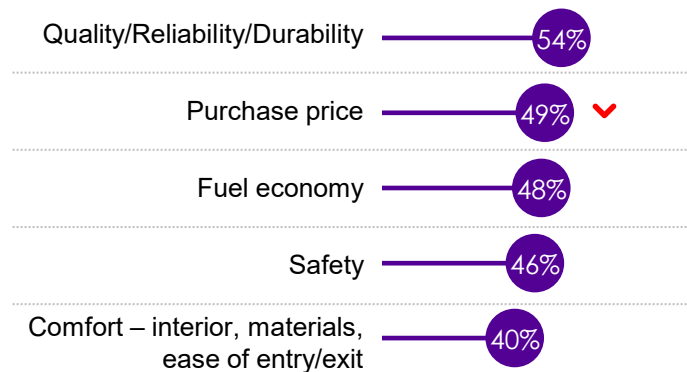
POWERTRAIN INTENDER: Plug-In Hybrid

7% of
sample

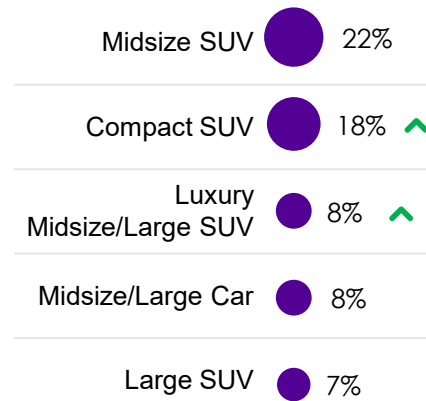
Higher price point with less emphasis on purchase price. Prioritize quality, efficiency, and safety, while balancing environmental concern and interest in new technology. Favor versatile vehicle segments like midsize and compact SUV. Use vehicle for longer trips so value long-distance flexibility, reinforcing PHEVs as a practical way to gain electric benefits without fully relying on charging.



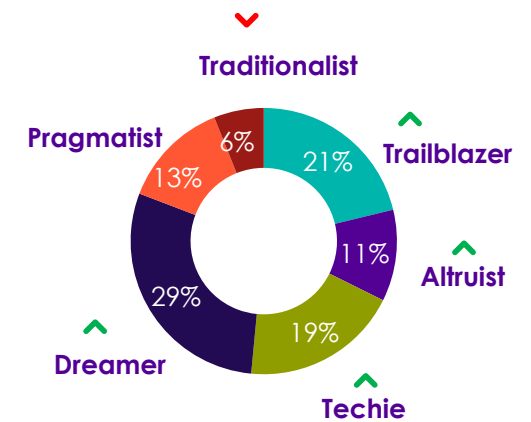
MOST IMPORTANT VEHICLE ATTRIBUTES



NEXT VEHICLE SEGMENT



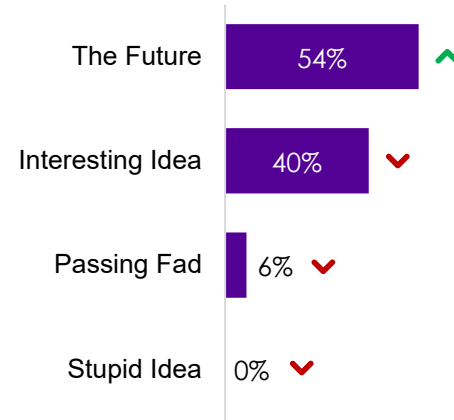
VEHICLE VALUES



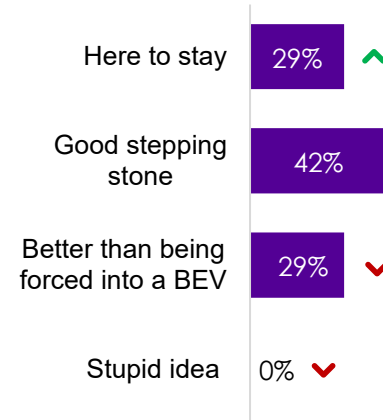
POWERTRAIN INTENDER: Plug-In Hybrid

BEVs are viewed as the future, or at least an interesting idea. PHEVs are seen as a practical stepping stone toward full electrification, while EREVs generate interest but less conviction. Although environmental benefits, cost savings, and reduced reliance on fossil fuels are appealing, concerns around range, charge time, and battery life keep PHEVs well-positioned, with hybrid as top a contender over BEV and EREV.

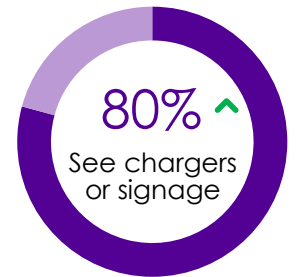
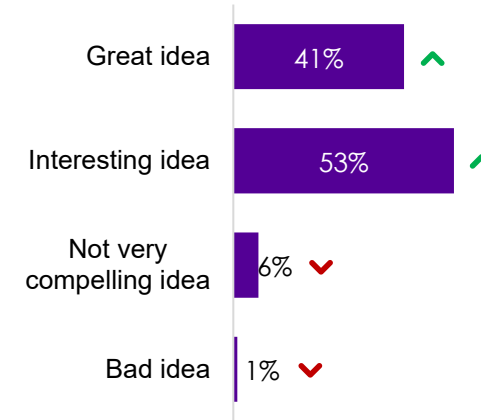
BEV PERCEPTIONS



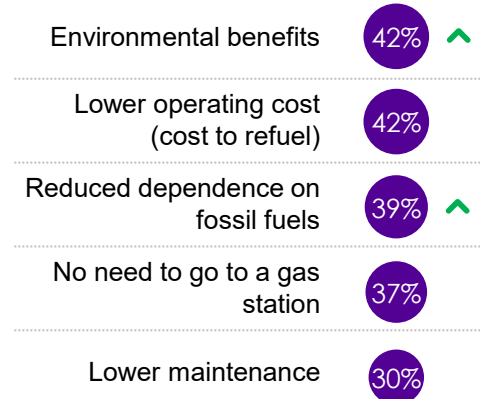
PHEV PERCEPTIONS



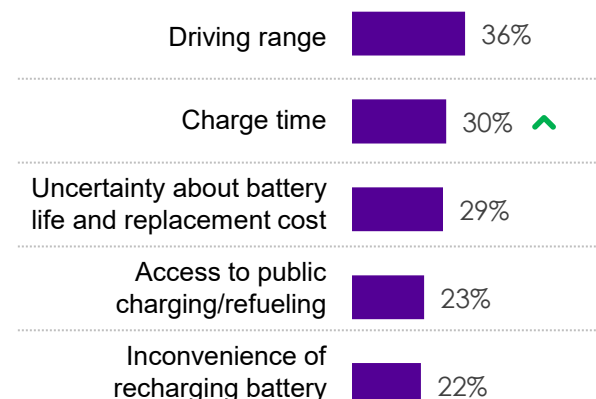
EREV PERCEPTIONS



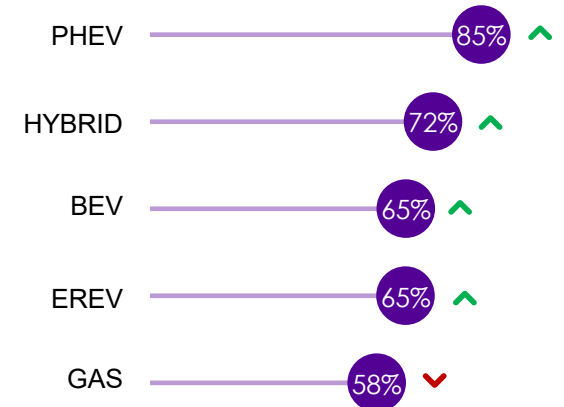
TOP BEV BENEFITS



TOP BEV BARRIERS



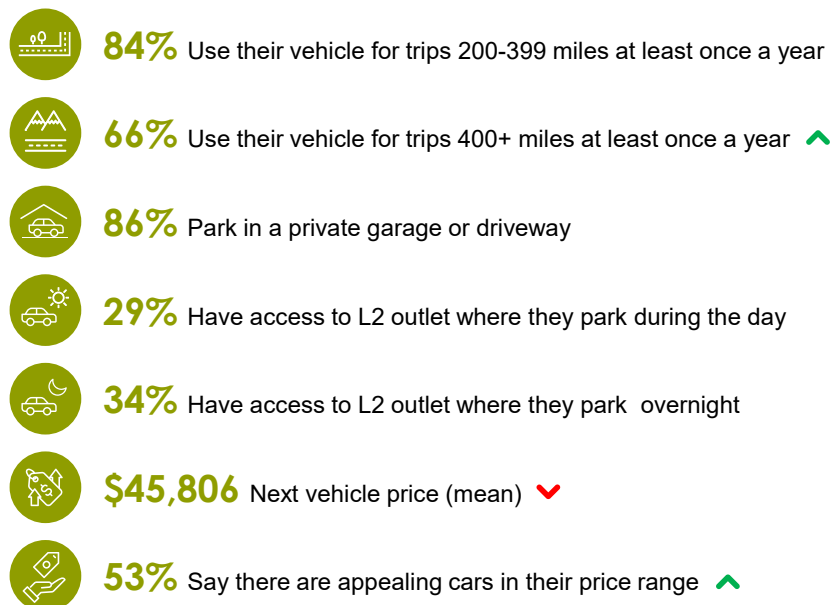
POWERTRAIN INTENTION SCORE



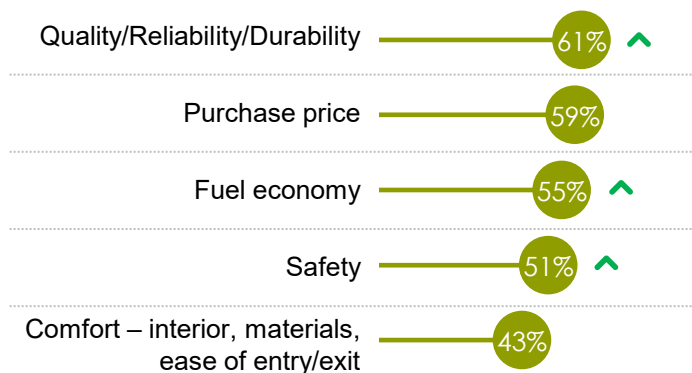
POWERTRAIN INTENDER: Hybrid

18% of
sample

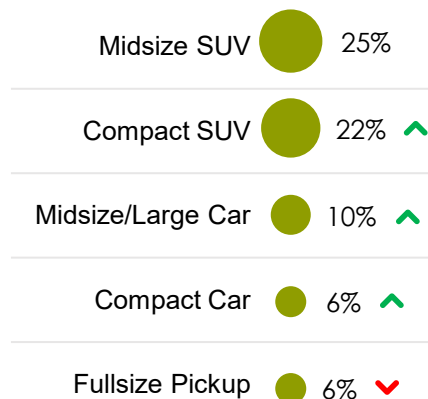
Park in private garage or driveway for easy home charging, but few have L2 access. Lower expected spend on their next vehicle and roughly half see appealing cars in their price range. High proportion of Dreamers and Pragmatists means they are value-driven and convenience-focused. Favor quality, costs, and safety; environmental and climate considerations matter to them. Segment preferences span car, SUV, and pickup



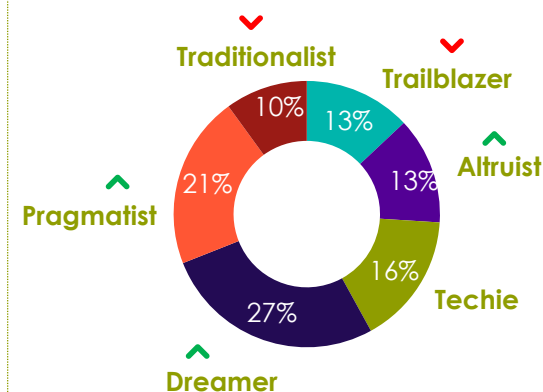
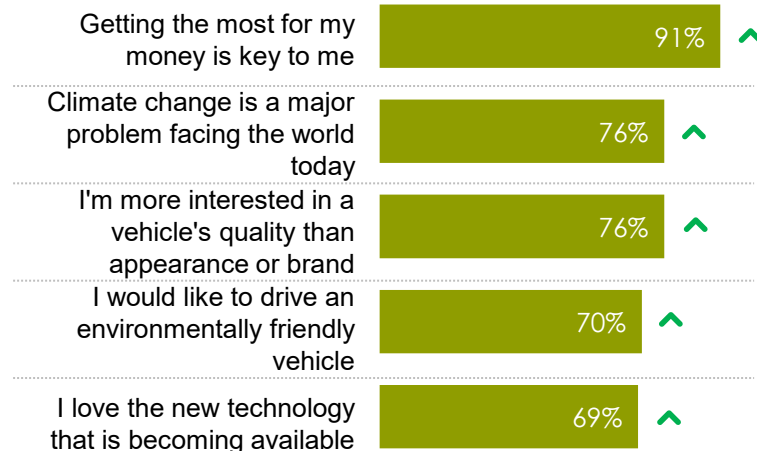
MOST IMPORTANT VEHICLE ATTRIBUTES



NEXT VEHICLE SEGMENT



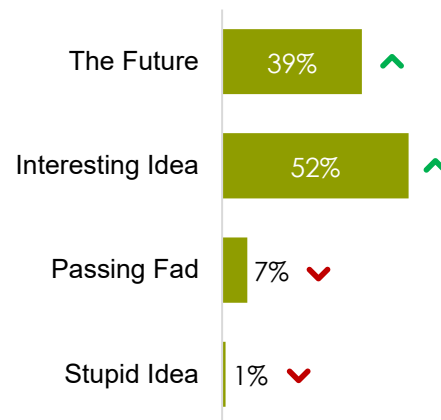
VEHICLE VALUES



POWERTRAIN INTENDER: Hybrid

Support electrification but approach it cautiously. BEVs are more so an interesting idea, PHEVs are a good stepping stone or at least better than being forced into electrification, and EREVs are an interesting idea. Recognize BEV benefits as cost savings, environmental, and reduced dependence on fossil fuels, but range and other barriers outweigh the benefits, which translates into lower interest in plug-in powertrains that require a changing routine.

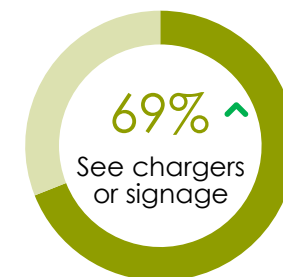
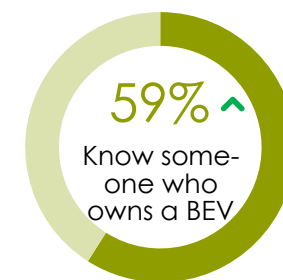
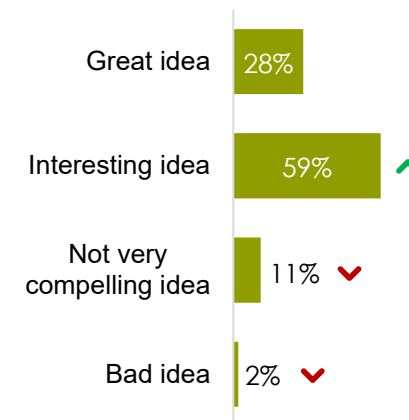
BEV PERCEPTIONS



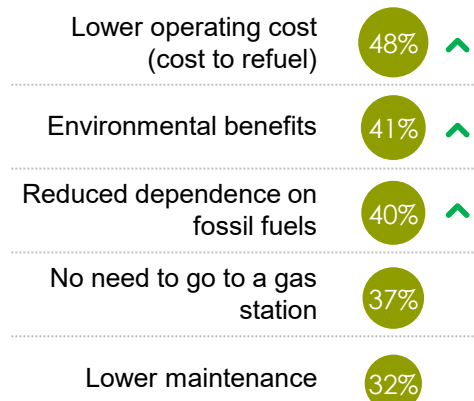
PHEV PERCEPTIONS



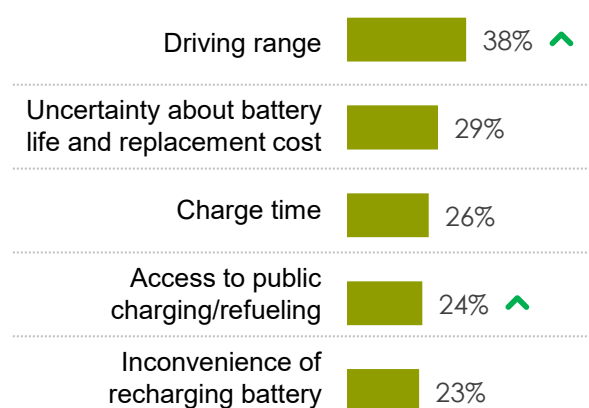
EREV PERCEPTIONS



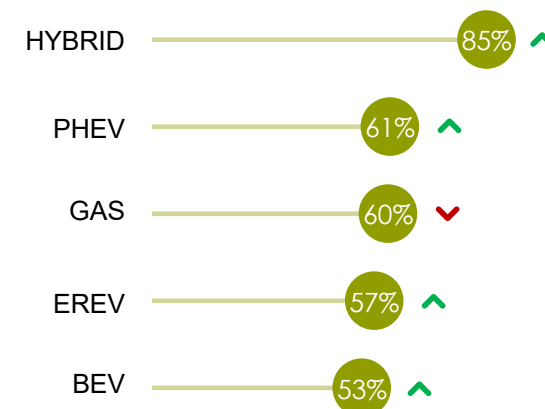
TOP BEV BENEFITS



TOP BEV BARRIERS



POWERTRAIN INTENTION SCORE

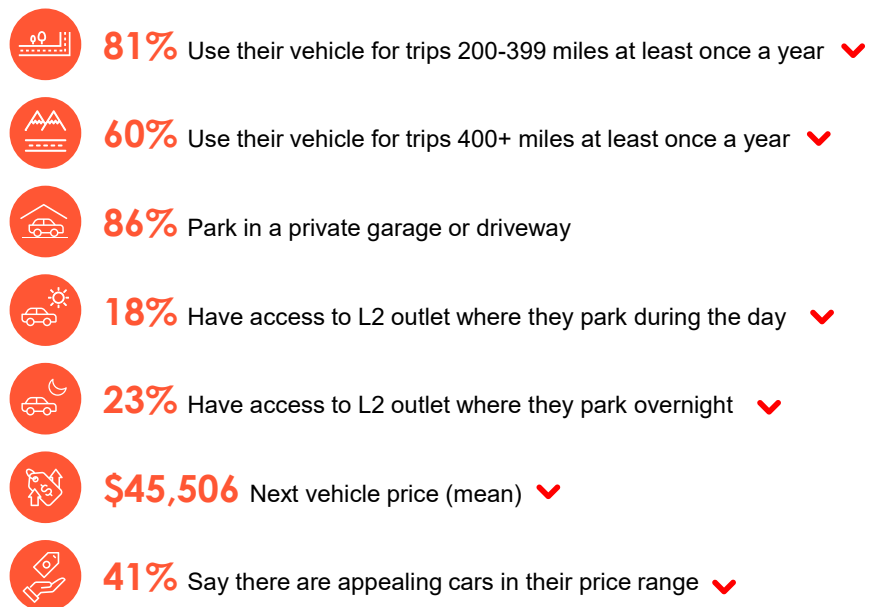


POWERTRAIN INTENDER:

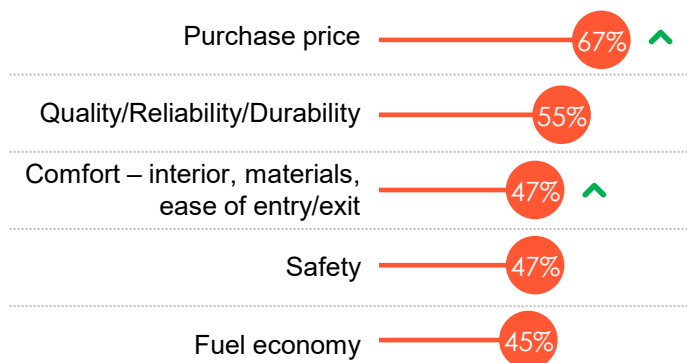
Gas

48% of sample

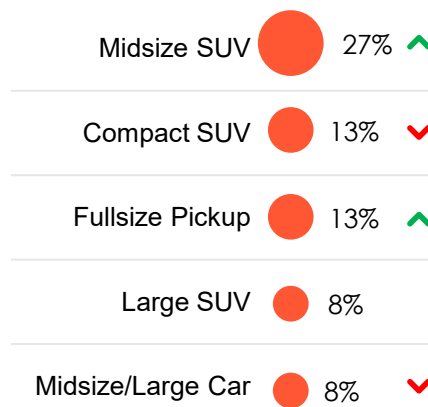
Environmental benefits nor emerging technology are strong considerations when thinking about their next vehicle. Care more about affordability, Q/R/D, and comfort. Gravitate toward SUVs or fullsize pickup. Larger proportion are traditionalists who show limited interest in electrified powertrains.



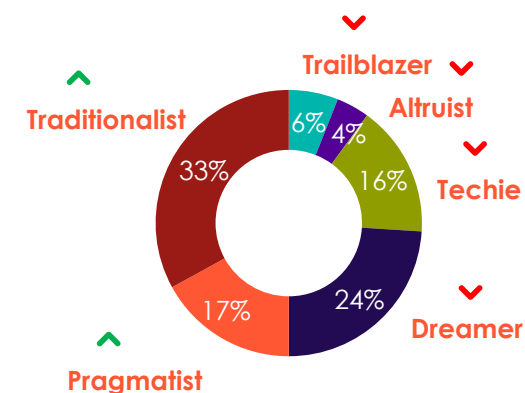
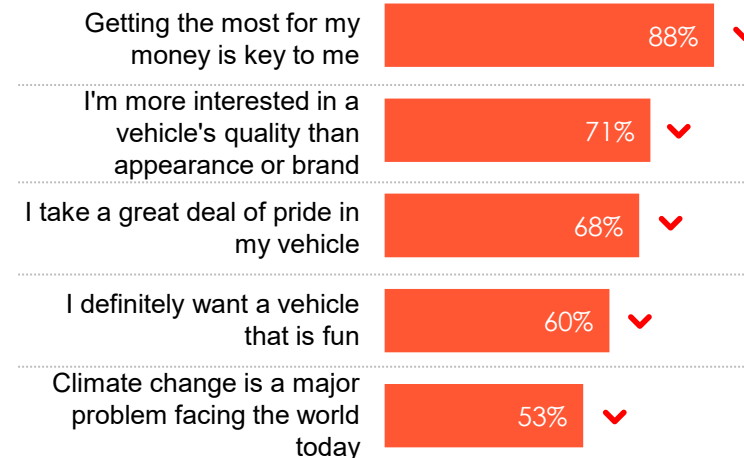
MOST IMPORTANT VEHICLE ATTRIBUTES



NEXT VEHICLE SEGMENT



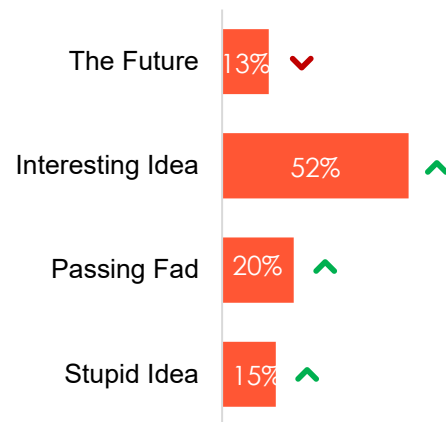
VEHICLE VALUES



POWERTRAIN INTENDER: Gas

Electrification is viewed skeptically across the board, including BEV, PHEV, and EREV. Eliminating routine gas station visits, lower operating cost, and quietness are seen as BEV benefits, but do not outweigh the barriers of range, battery uncertainty, and charging. Few know a BEV owner or see signage for charging. Intend gas above all else. Electrified options do not come close to gas purchase intention.

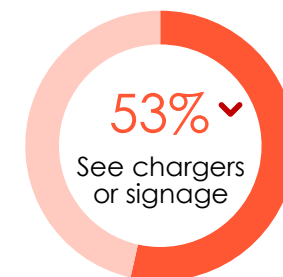
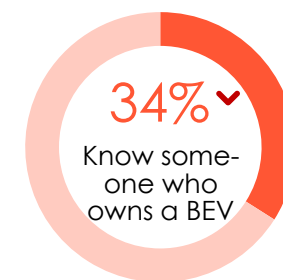
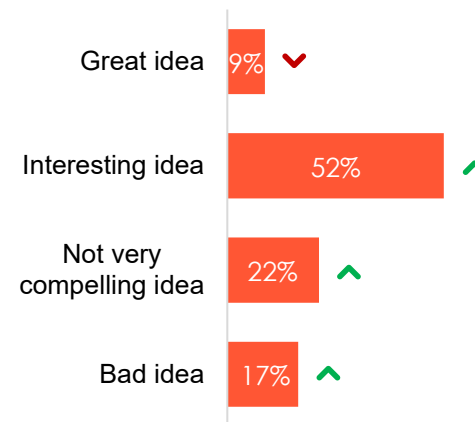
BEV PERCEPTIONS



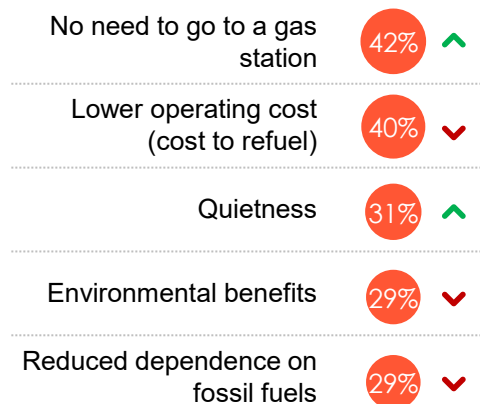
PHEV PERCEPTIONS



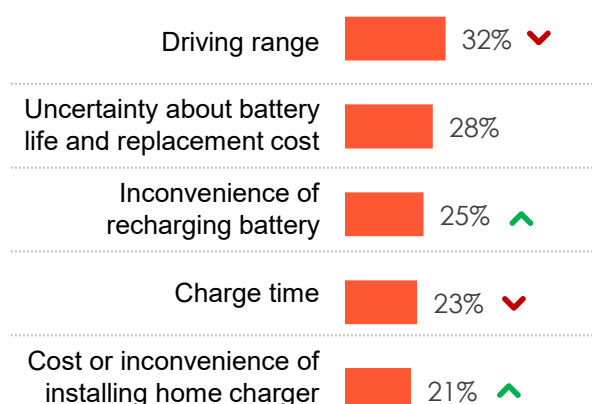
EREV PERCEPTIONS



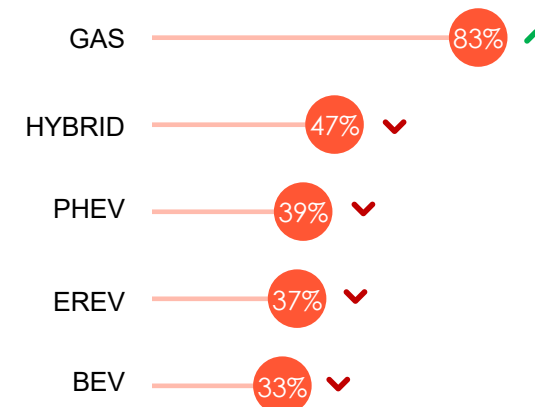
TOP BEV BENEFITS



TOP BEV BARRIERS



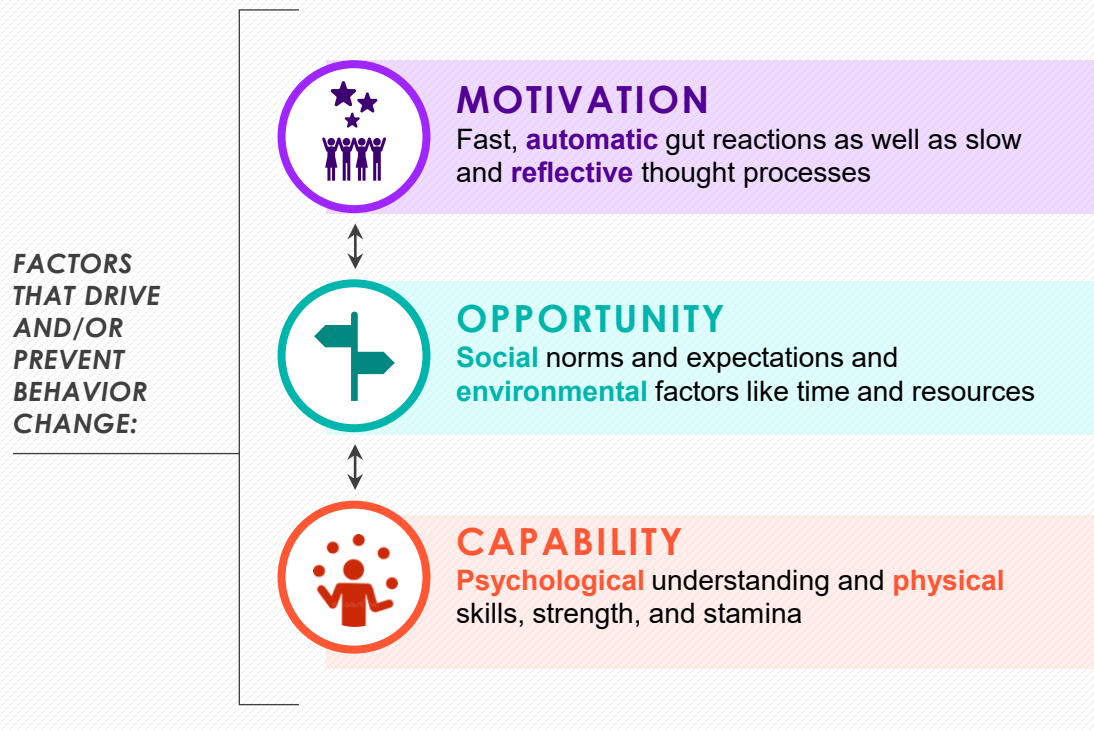
POWERTRAIN INTENTION SCORE





Behavioral Science and BEVs →

COM-B Model



BEV practicality is improving, likely supported by an increase in public charging awareness and softening concerns around public charging and other key barriers.

However, progress is offset by perceptions that keep buyers hesitant. Required range continues to creep upward and many still believe that BEV sales are outpacing investments in public charging infrastructure. Concerns about battery reliability, repair costs, affordability, range, the charging experience, and availability of appealing models remain widespread.

These perceptions are compounded by a challenging market environment. Tariff costs are being passed on to buyers at a

time when vehicle prices are already thought to be at historic highs and affordability is a central industry obstacle. Legacy brands are under increasing pressure as lower-priced Chinese competitors threaten to enter the market and the federal EV tax credit is eliminated. Economic uncertainty is making buyers more cautious about committing to large purchases.

The COM-B (Capability, Motivation, Opportunity – Behavioral) model offers a useful framework for addressing these challenges. Examining capability, opportunity, and motivation provide a structured way to diagnose what is holding BEV adoption back and how interventions can drive behavior change.

COM-B Factors

BEV Opinions Driven By Logic, Not Impulse

Reflective motivation is the primary driver of shifts in BEV sentiment, pushing sentiment both more positive and more negative. This indicates that buyers are evaluating BEVs through analytical reasoning rather than emotional impulse. Opinions are shaped by exposure to information and conscious assessment of trade-offs, which is consistent with “System 2” thinking where consumers weigh facts (both positive and negative) to determine whether a BEV makes sense for them.

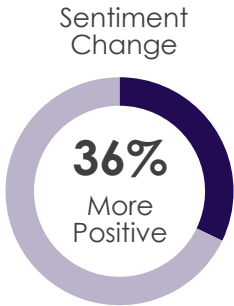
By contrast, automatic motivation—habits, emotions, impulses—has minimal influence on BEV sentiment.

Environmental opportunity is a close second in driving negative sentiment. When consumers feel they lack the

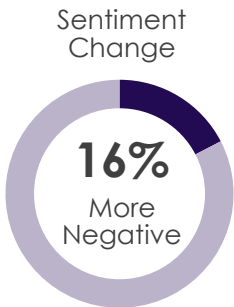
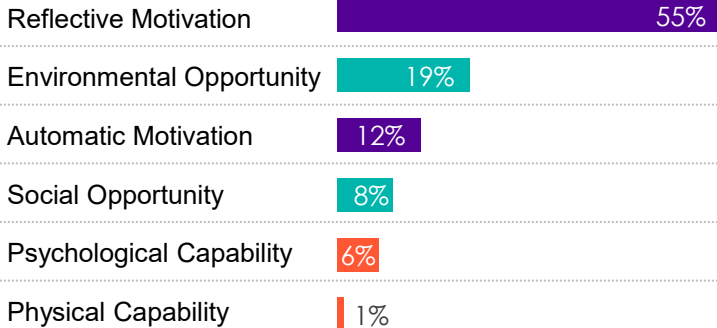
resources to own a BEV, sentiment worsens. Resource constraints span the full BEV ecosystem, including vehicle capabilities (range and charge time), the charging environment (both at home and in public), and the finances required for ownership.

Social opportunity plays a relatively minor role. Cultural norms, peer influence, and social visibility alone are insufficient to shift BEV sentiment. Simply seeing more BEVs on the road does not drive sentiment. Buyers need proof that BEVs are a worthwhile investment that will suit their needs.

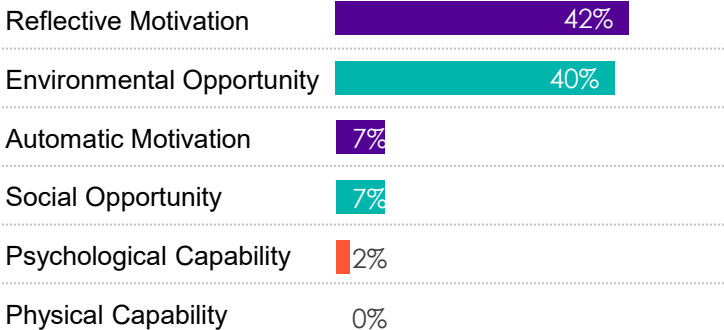
Psychological and physical capability have no or minimal impact on BEV sentiment. Decision-making capacity and physical abilities do not apply to BEV sentiment.



COM-B FACTOR



COM-B FACTOR



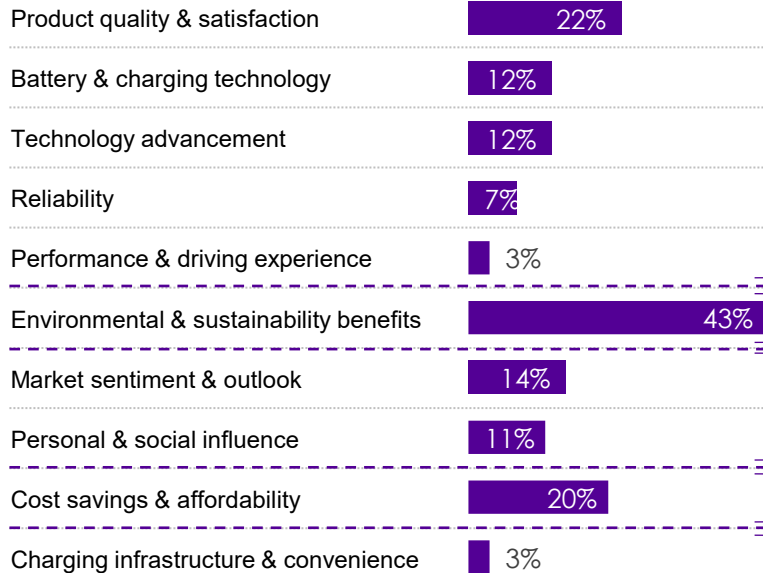
Reflective Motivation → Positive Sentiment



Improving BEV sentiment is rooted in **reflective motivation**

Reflective motivation refers to conscious beliefs, cost-benefit evaluations, identity alignment, and future planning that influence behavior

TOP 10 POSITIVE SENTIMENT TOPICS



Product improvements drive the biggest gains in BEV sentiment, with advances in quality, battery performance, range, technology, and reliability making BEVs feel like a viable option

Environmental benefits lift sentiment but ultimately don't drive adoption; buyers need to see personal value for positive sentiment to translate into purchase intent

Proof of concept boosts confidence as BEVs become more common and consumers see them working in real-world situations, reinforcing the idea that they are the future

Lower operating costs, particularly fuel savings, support positive opinions

Public and home charging have minimal influence on positive sentiment, signaling friction in the charging ecosystem. This topic surfaces as an environmental opportunity factor that negatively impacts sentiment and will be covered later in this section

“

battery electric vehicle have become more affordable and have longer ranger ranges than before. Charging stations are popping up everywhere , making them more convenient

It is getting more innovative and more reliable

At the beginning I thought it was a crazy idea but now I think it'll be better for the environment as well as in the long run you will save a lot of money

Battery electric vehicles seems to be the new reality and the future

I have seen them in action and think they are a great idea for in city driving

I have gained more knowledge and seen them improve with time

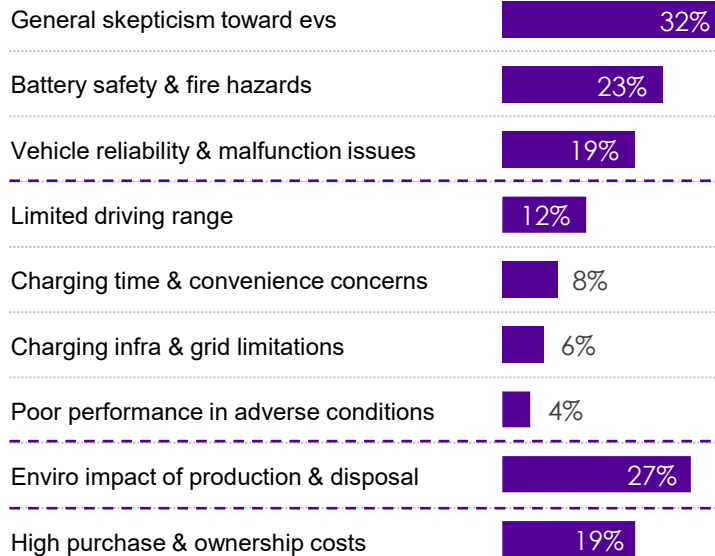
Reflective Motivation → Negative Sentiment



Worsening BEV sentiment is also rooted in **reflective motivation**

Reflective motivation refers to conscious beliefs, cost-benefit evaluations, identity alignment, and future planning that influence behavior

NEGATIVE SENTIMENT TOPICS



Worsening sentiment is largely from general dislike and skepticism toward BEVs with buyers focusing on things that have gone wrong with the vehicles

Negative reviews and anecdotes drive reliability concerns, including fears of expensive repairs and safety issues such as battery fires

BEVs are viewed as impractical or unnecessary, highlighting capability limitations (range and charging), which reinforce preferences for gas

- Perceived lack of public charging infrastructure
- Concerns that the electrical grid cannot support widespread adoption
- Charging inconvenience (public charging availability and wait times)
- Inadequate driving range, especially in cold weather

Environmental concerns, like resource-intensive production and battery disposal, negatively impact sentiment

“

I just do not they are practical and more of a headache than they are worth.

More documentation of fires from batteries overheating.

The cost of the vehicle and the cost of the repairs are absolutely ridiculous and you can only go so many miles before having to find a charging station, and the charging stations are absolutely ridiculously priced

The national electric grid cannot support this level of usage.

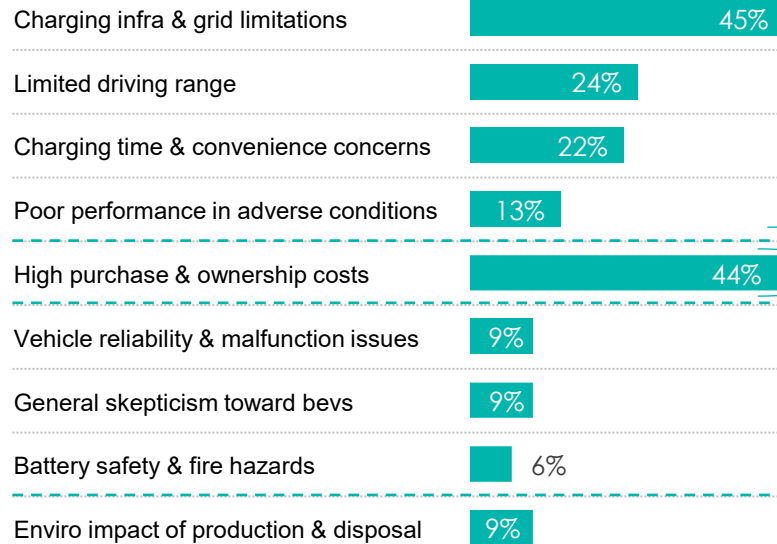
Environmental Opportunity → Negative Sentiment



Worsening BEV sentiment is rooted in **environmental opportunity**

Environmental opportunity includes external physical factors such as time, access, cost, or location that influence behavior

NEGATIVE SENTIMENT TOPICS



External factors drive negative BEV sentiment

- BEV capabilities and the charging ecosystem are perceived as inadequate and undermine confidence in everyday usability
- Range and charge time limitations are inconvenient, reinforcing skepticism about the powertrain
- The charging ecosystem and experience is a perceived pain point because of limited access to public charging, friction around installing a home charger, and concerns about grid readiness

High purchase prices and perceived financial risk persist, particularly fears around battery replacement and expensive repairs

“

BEV's issues with charging infrastructure , range anxiety (especially in cold weather), higher upfront costs, and battery degradation/replacement cost

It seems hard to find locations to charge. The time to charge seems long as well.

More and more there are failures that are discovered such as cold weather operations, etc. and the costs to deal with the battery.

I don't trust the idea of an electric vehicle due to the possibility to having a malfunction while driving, or not kicking into gasoline if electric fails.

Reflective Motivation Interventions



→ To address key drivers of reflective motivation, reinforce levers that promote positive sentiment and combat levers that lead to negative sentiment

→ Reflective Motivation Interventions:

- **Education**- Informing and explaining to increase knowledge and understanding
- **Persuasion**- Influencing to develop positive or negative feelings that stimulate action

→ **Persuasive education initiatives** can reinforce positive views and soften or neutralizing negative sentiment

- Reinforce positives by highlighting progress in BEV capabilities, including better quality, longer range, faster charging, improved reliability, advanced technology, expanded public charging, and easier home charging
- Sensational or isolated stories (often amplified by local news) can distort perceptions. Counter negative narratives with facts and real-world examples about life with the powertrain. Education can reframe these narratives as exceptions, not the norm
- Close perception gaps that make the powertrain feel unaffordable, like discrepancies between perceived and actual purchase prices, operating and maintenance costs, and battery longevity
- Address skepticism through clarity and transparency. Negative sentiment is often rooted in uncertainty, misinformation, and a lack of understanding, making education a critical tool to replace assumptions with credible proof points

→ Reflective Motivation Interventions:

- **Incentivize**- Establishing rewards and incentives

→ **Targeted rewards and incentives** make the switch to BEV feel worthwhile and reinforce the BEV value proposition

- With the federal EV tax credit discontinued, automakers must fill the gap with alternative incentives
- Effective levers include bundling a home charger with the purchase of a BEV, offering extended battery warranties to reduce perceived risk, and introducing longer-term financing options (e.g., 7-year loans) to ease affordability concerns

BEV Truths

Misinformation Is Holding BEVs Back

Escalent tested several common misconceptions about BEVs to understand how surprised buyers were to learn the truth and how this information impacts their consideration for the powertrain.

Buyers' high levels of surprise and positive impact on BEV purchase interest show the effect that misinformation has on BEV purchase consideration and highlights the important of strong marketing campaigns

that educate buyers about the realities of ownership.

Learning about the realities of charging—that the majority is done at home and home charging costs are lower than expected—has a positive impact on BEV interest.

Escalent tested other BEV misconceptions in the May 2025 Newsletter and can be accessed in [Enlyta](#).

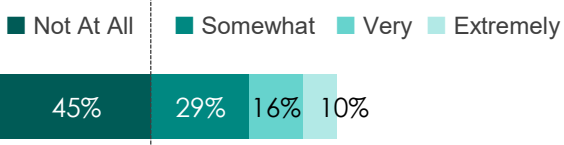


CHA7. Is this information..?
CHA8. Does this information make you more or less interested in purchasing a battery electric vehicle?
CHA15. Is this information..?
CHA16. Does this information make you more or less interested in purchasing a battery electric vehicle?
Sample size: n=836

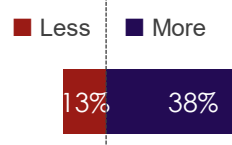
TESTING BEV TRUTHS

Because people are used to going to a gas station to refuel, many people think they'll use public charging to recharge a BEV if they purchase one. However, according to the Department of Energy, approximately 80% of electric vehicle charging is done at home.

HOW SURPRISING IS THIS INFORMATION?

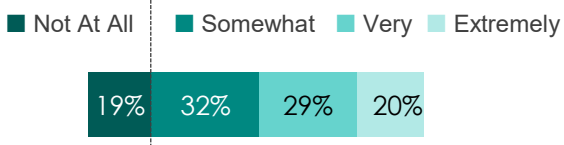


IMPACT THAT INFORMATION HAS ON INTEREST IN PURCHASING BEV

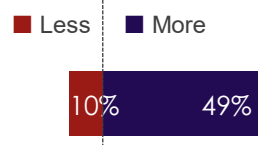


Many people are concerned about how much it would cost to charge an EV at home. According to Escalent research, nearly half of all EV owners indicate that the cost of charging at home is lower than they expected it to be.

HOW SURPRISING IS THIS INFORMATION?



IMPACT THAT INFORMATION HAS ON INTEREST IN PURCHASING BEV



Tax Credit Dissolution

The Lost EV Lever

In July 2025, months before the federal EV tax credit was discontinued, a considerable share of consumers were not aware that many new BEVs may have been eligible for a \$7,500 incentive. This lack of awareness persists even among shoppers with stronger BEV purchase intent. As previously noted, incentives are a critical lever for building positive sentiment, as it strengthens affordability for value-focused buyers.

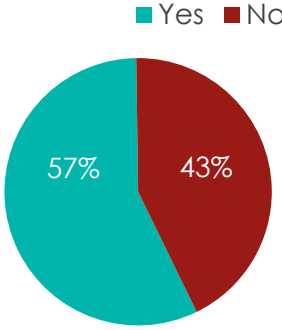
When the federal government stepped away from its role as a financial supporter of EV purchases, buyers felt that automakers should help fill the gap. While this is easier said than done, reducing prices on existing BEV models and focusing on producing new, less expensive BEVs could help

reengage the electrified-ready cohort that is hindered by upfront purchase prices.

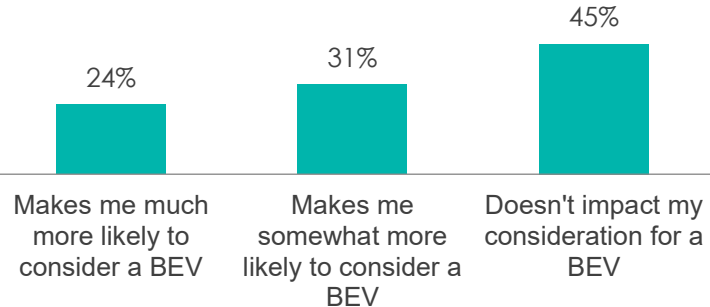
In July 2025, Escalent also asked buyers how impactful the \$7,500 federal EV tax credit is on their consideration for a BEV. Many said it made them at least somewhat more likely to consider one.

Given the clear relationship between incentives and purchase consideration, it is essential that automakers actively promote whatever BEV incentives are available. As demonstrated by the federal EV tax credit, incentives can increase purchase consideration, but only if buyers are aware they exist.

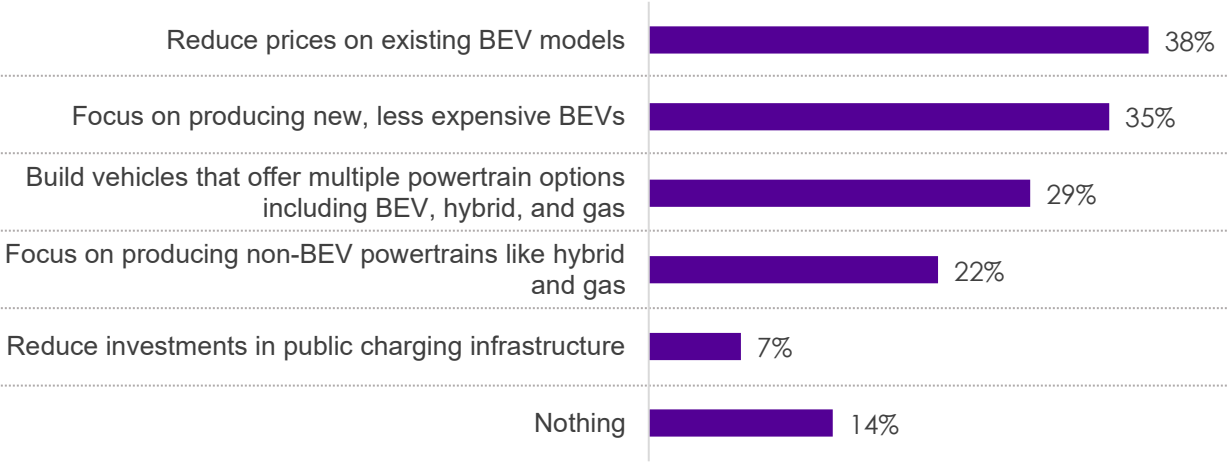
AWARE THAT MANY NEW BEVS ARE ELIGIBLE FOR A \$7,500 FEDERAL



IMPACT OF \$7,500 FEDERAL TAX CREDIT ON BEV PURCHASE CONSIDERATION



IN RESPONSE TO DISCONTINUATION OF FEDERAL EV TAX CREDIT...WHAT SHOULD THINK AUTOMAKERS DO?



Environmental Opportunity Interventions



→ To address key drivers of environmental opportunity, create an environment that supports, welcomes, and builds confidence in BEV ownership

→ Environmental opportunity Interventions:

- **Restriction-** Using rules or laws to change behaviors

→ **Rules and regulations** to change consumer behavior is a limited lever for automakers, as policy decisions are largely outside their control

- The current policy environment is not supportive of BEV adoption. The discontinuation of the federal EV tax credit, reduced funding for public charging infrastructure, and relaxed emissions requirements all dampening momentum

→ Environmental opportunity Interventions:

- **Enablement-** Increase means or reduce barriers to increase capability (beyond education and training) or opportunity (beyond environmental restructuring)
- **Environment Restructure-** Changing the social or physical environment

→ **Enablement and environment restructuring** can make BEV ownership feel manageable, predictable, and beneficial

- The BEV ownership experience differs from gas, and buyers need support to understand and reframe those differences
- Bundle a home charger and installation with a BEV purchase to remove a major barrier and unlock benefits: no routine gas station visits, wake up fully charged, access to home energy programs that improve energy resilience and reduce costs
- Take ownership of the entire charging experience by supporting public charging developments and offering charging apps that build confidence on longer trips
 - Make public charging predictable by offering a real-time charging app that shows where to charge, when to stop, how long charging will take, charger availability, and if chargers are in working order
 - Although rare, negative public charging experiences disproportionately erode trust and repurchase intent. Establish “certified charging locations” with service-level guarantees. Route navigation can suggest chargers based on experience (i.e., reliable chargers) in addition to convenience (i.e., the nearest charger)
 - Neutralize concerns about the cost of public charging by offering a free public charging period (ex. first year of ownership), a flat-rate charging subscription bundled with the vehicle, or transparent in-app pricing



The BEV Market in Focus →

Diffusion of Innovation

Moving Beyond The Early Adopter

BEV adoption has moved from innovators and niche appeal into the mass market, naturally slowing the pace of growth. Early momentum developed quickly, but progress is now more gradual as BEVs work through the mass majority.

The 2024 Path to Purchase: Crossing the Chasm DeepDive showed continued movement through the adoption funnel, with no clear “chasm” detected. That finding still holds and underscores the need for automakers to continue evolving their products and marketing to broaden BEV appeal for subsequent waves of BEV shoppers.

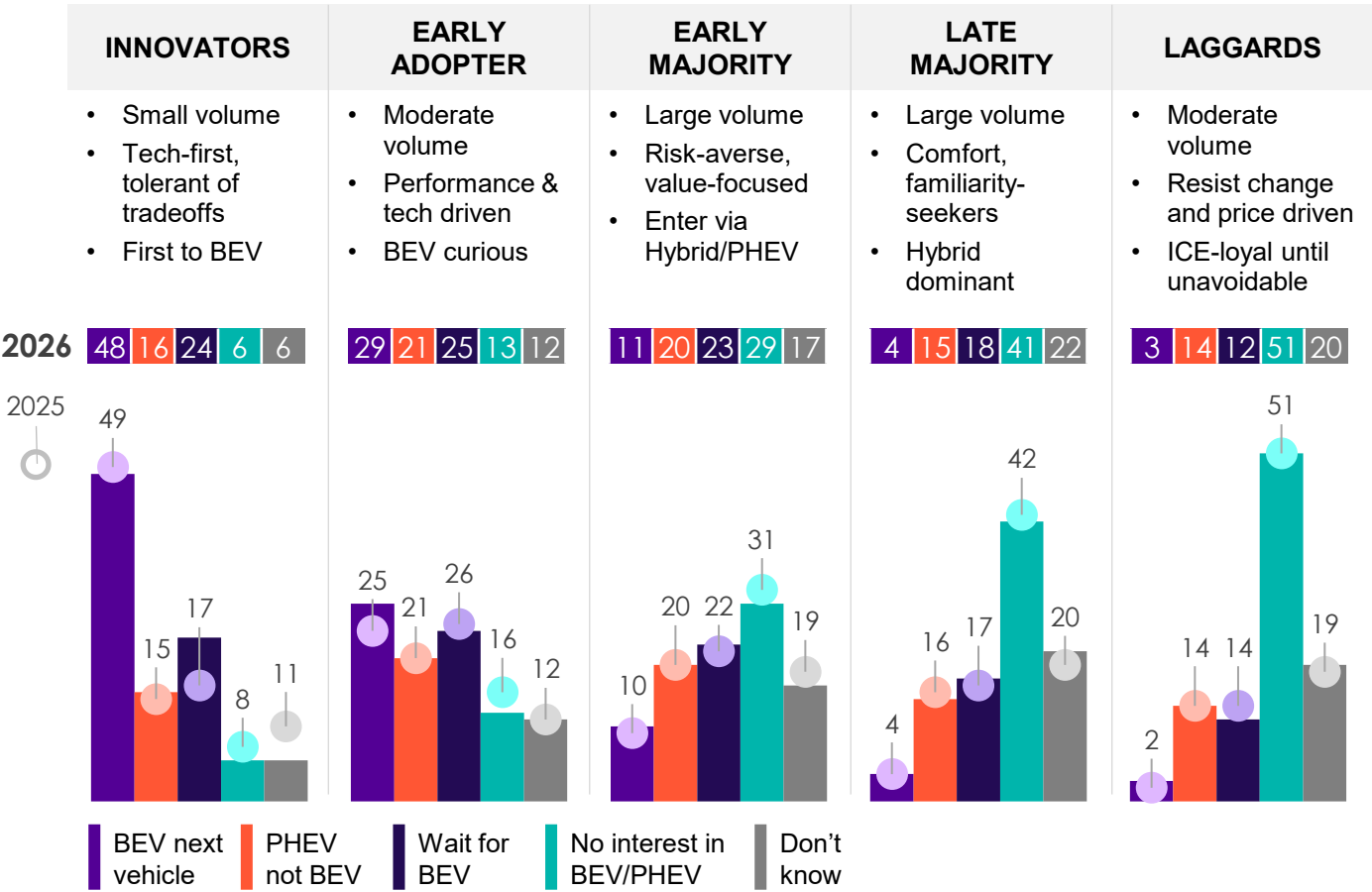
Movement through the funnel continues. Innovators remain committed to BEVs but are

increasingly willing to wait for models that fully meet their needs, signaling commitment to the powertrain but wiliness to delay. At the same time, the share of Innovators who are not interested in BEVs or PHEVs or are undecided is shrinking.

Early Adopters are more likely to say their next vehicle will be a BEV in 2026 and are less likely to reject electrified options.

Uphill progress among the Early and Late Majority is inherently slower but still show signs of movement. These groups show incremental movement toward electrification. As adoption moves beyond tech-forward buyers, success increasingly depends on delivering complete solutions that prioritize value and convenience.

DIFFUSION OF INNOVATION



Practicality & Anxiety

Practical Gains, Psychological Barriers

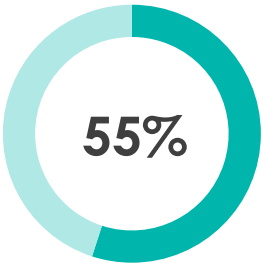
Perceived practicality of owning a BEV has been steadily rising since 2020. Most recently, practicality increased 3 pts in 2026, suggesting public infrastructure buildout and capability advancements are noticed by buyers.

That said, practicality still sits near the midpoint, indicating substantial room for improvement.

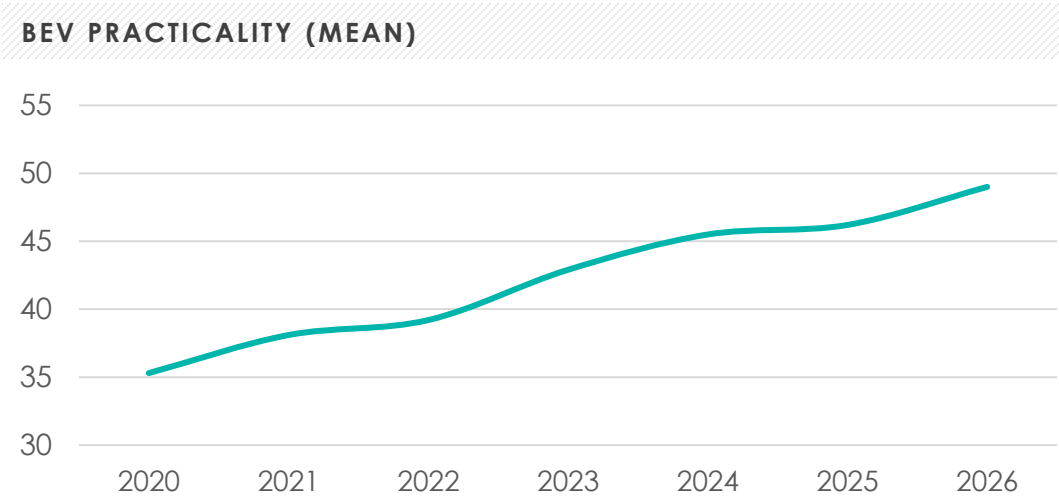
Despite progress on viability, anxiety

about owning a BEV has not changed. Anxiety if their next vehicle had to be a BEV has been hovering around 55% since 2023.

This suggest that, while infrastructure and technology are improving perceptions of practicality, resistance persists. Barriers may now be less functional and more psychological or behavioral, such as reluctance to change their vehicle ownership habits.



Would be anxious if their next vehicle had to be a BEV (2023-2026 avg.)



Journeys

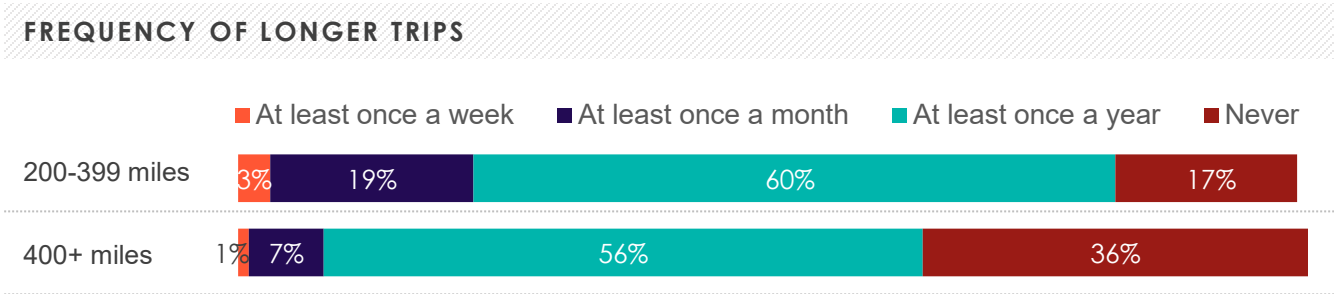
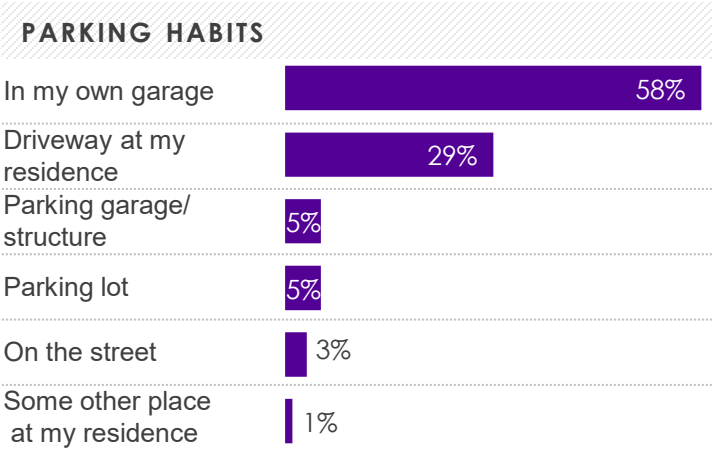
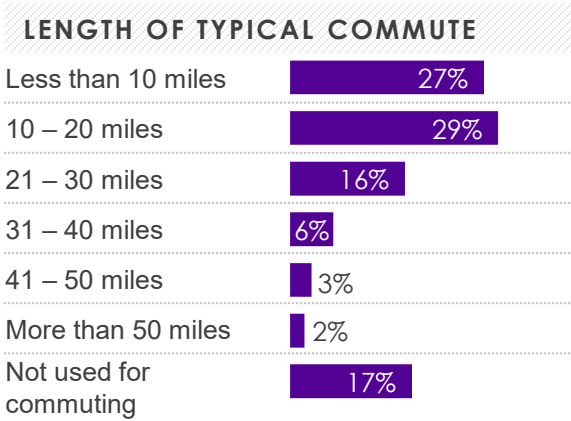
Most Days Are Easy, Long Trips Cause Anxiety

Most drivers have commutes well within BEV range capabilities and park in a private garage or driveway, making Level 2 home charging a realistic option. As a result, day-to-day charging concerns largely center on the ability to install a home charger, an obstacle automakers can remove by offering a home charger and installation with the purchase of a BEV.

Longer trips introduce a different set of anxieties. Most drivers take at least one trip of 400+ miles each year, which is a range beyond the capability of most BEVs. This brings public charging into focus and surfaces practical concerns: where to charge, how long charging will take, will there be an available charger, will the equipment work reliably, etc.

Because most buyers are unfamiliar with the public charging experience, it is often perceived as a hassle. Emphasizing the convenience of home charging addresses the majority of charging needs, but it doesn't address charging on longer trips.

Automakers can address this concern by making public charging feel predictable and manageable. Real-time charging apps that route to reliable and convenient chargers, estimate charging times, and show pricing and nearby amenities, can bring confidence to the experience. Better tools, and promotion and education about these tools, can reduce anxieties among buyers who are weary about the new experience.



Practicality & Charging

Visibility Rising, Confidence Lagging

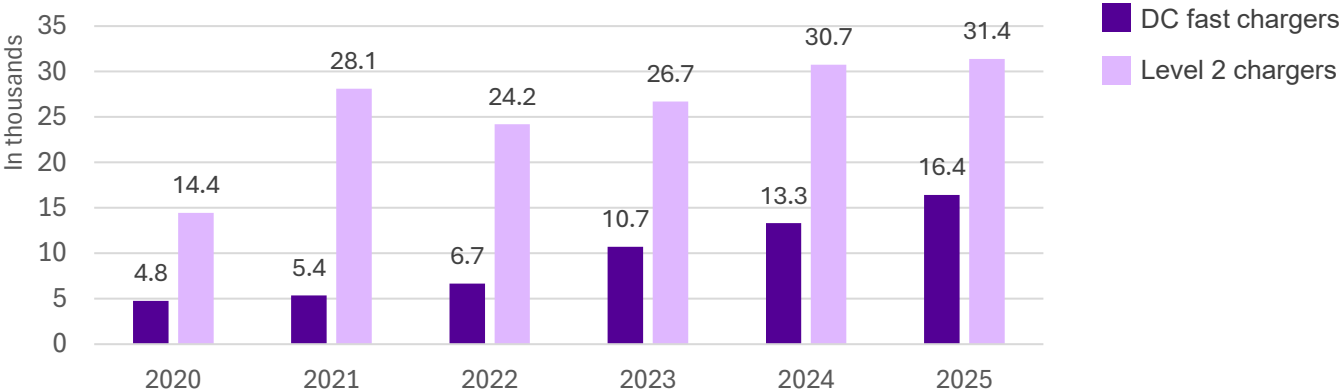
The public charging network has continued to expand since 2020, and more drivers are noticing chargers along their typical routes.

Access to public charging is a top concern and public charging visibility is an important contributor to rising perceptions of BEV practicality. However, while both charging awareness

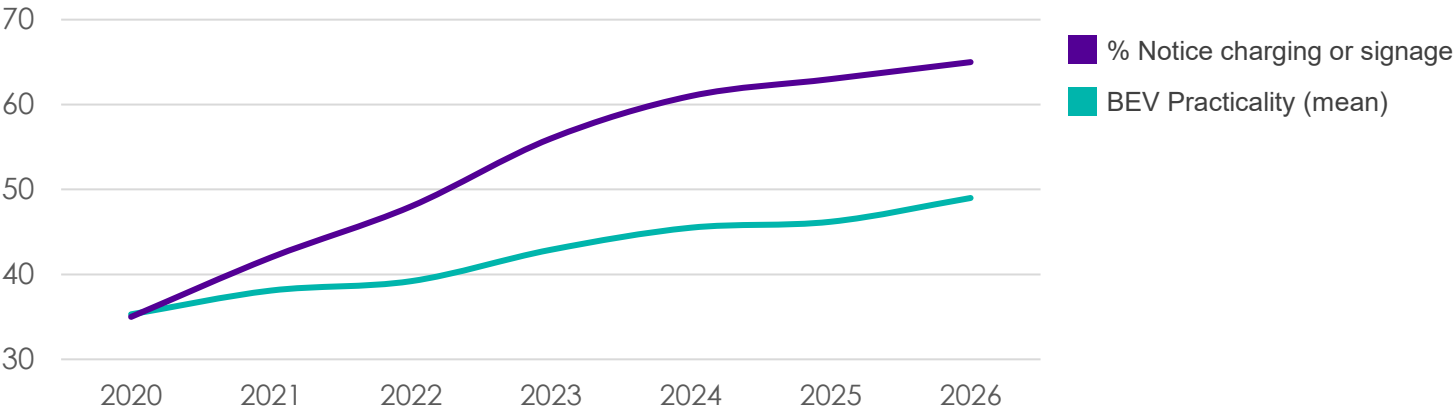
and perceived practicality are increasing year over year, they are not rising at the same pace.

The growing gap shows that public charging buildout alone is insufficient to drive adoption. Consumers are seeing more chargers, but are still questioning whether charging access is convenient, reliable, and well-located for their needs.

NUMBER OF NEW U.S. PUBLIC CHARGING LOCATIONS PER YEAR*



PRACTICALITY & LOCAL CHARGING AWARENESS



Public Charging Concerns

Concerns Soften But Are Still Prevalent

As charger counts and awareness grow, several related concerns have eased. Worries about the distance between chargers and finding a charger that is not being used each decline by 5 pts in 2026, suggesting that expansion is softening barriers tied to public charger density.

Nearly all other public charging concerns soften but are still prevalent.

Charge time remains as the top concern, meaning charging speed, not just availability, is a

critical adoption lever.

Cost to charge is still the second-highest concern, possibly reflecting rising electricity prices and uncertainty about public charging prices compared to gas. This highlights a perception vs reality education opportunity since public charging is typically less expensive or comparable to gas prices.

Safety while charging in public is a steady concern year over year, with women consistently more worried than men.

PUBLIC CHARGING CONCERN	2026	2025	MALE	FEMALE
Charge time	69%	72%	70%	68%
Cost to charge	55%	57%	54%	56%
Distance between chargers	50%	55%	50%	51%
Charger reliability	39%	41%	39%	39%
Finding a charger that's not being used	38%	43%	39%	38%
Finding a working charger	37%	40%	36%	37%
Safety	28%	28%	25%	31%
None of these aspects concern me	6%	6%	6%	7%

Range For Consideration

The Myth of “Enough” Range

Longer driving range acts as a band aid for charging confidence. Even as public charging buildout and awareness increase, and several public charging concerns soften, required range to consider a BEV continues to climb for the third consecutive year. This suggests that, while consumers see more chargers, they still don’t want to deal with the perceived hassle of public charging.

BEV range capabilities meet daily driving needs, but buyers still want 400+ miles of range. The disconnect is driven less by actual usage and more by psychological anxieties. Marketing should focus on closing this gap through education: emphasizing real-world range adequacy and real-time charging apps that make longer trips predictable and manageable. Building charging confidence, rather than merely showing public charger density, can reduce overreliance on range as a psychological safety net.

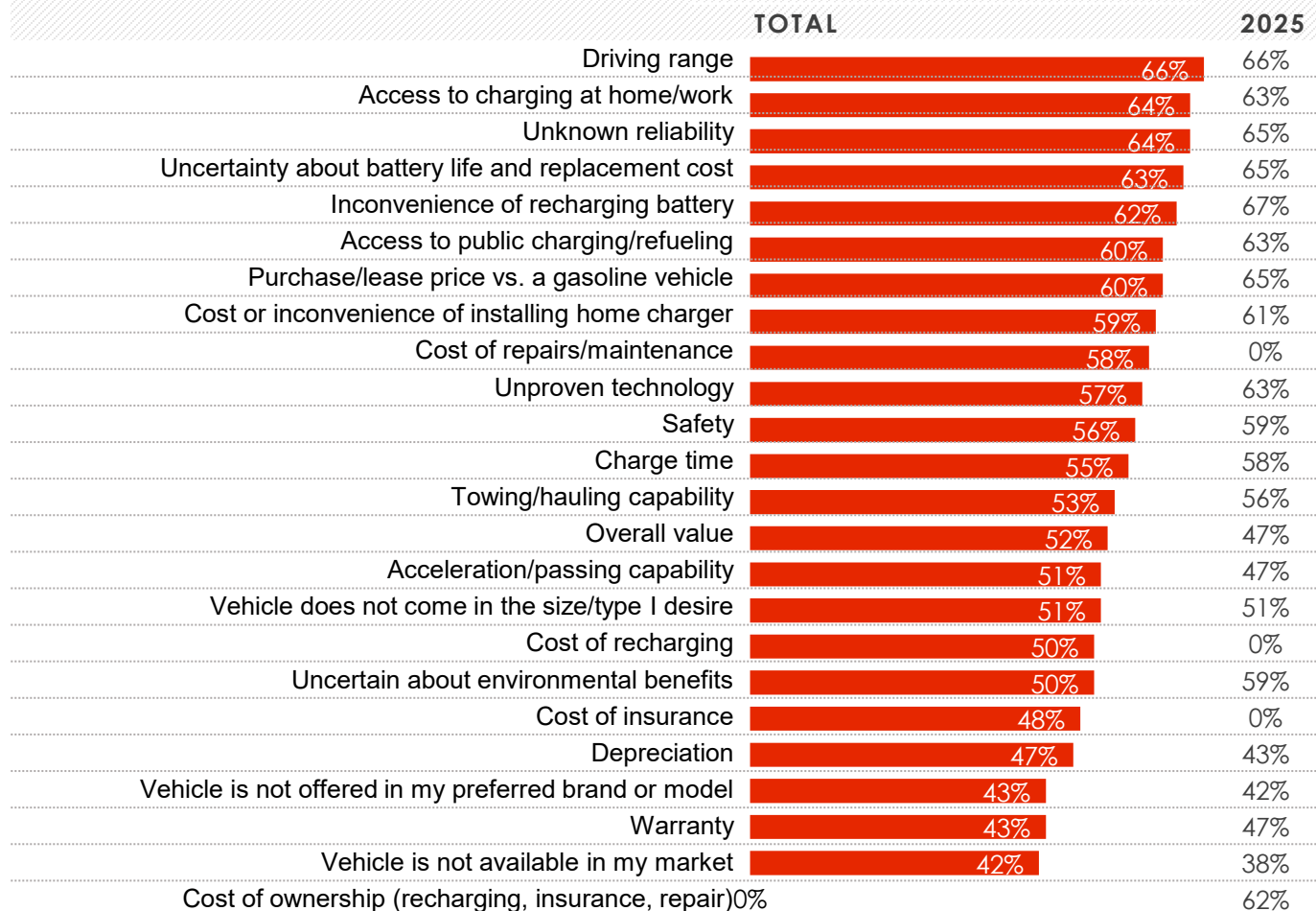
Another factor that may explain rising required range is that buyer expectations are increasing alongside improvements in BEV capabilities. As BEV range has extended over the past three years, consumer expectations have extended in parallel. In this context, required range is a moving target and is a proxy for other unresolved hesitations. As such, making a BEV with “enough” range may be unattainable, and automakers should direct their focus less on range capabilities and more on shaping the public charging experience.

Younger buyers and car intenders have range requirements lower than the average new car buyer. Their requirements are still above the range of most BEVs today but are closer to current market capabilities, meaning these segments are more addressable with today’s BEV offerings.

REQUIRED RANGE TO CONSIDER A BEV* (MEAN MILES)				NEVER SERIOUSLY CONSIDER BEV (2026)
	2026	2025	2024	
Total	431	420	409	24%
18-34	392	371	355	18%
35-54	414	408	385	19%
55-80	460	451	449	29%
Car intender	404	387	372	21%
SUV intender	431	423	414	23%
Truck intender	481	466	455	28%

Strength Of BEV Barriers

TOP 3 BOX



Many Top Deterrents Weaken

Driving range remains the strongest BEV barrier and is unchanged year over year, with roughly two in three saying it strongly deters them from purchasing the powertrain.

Unknown reliability is a top-tier barrier in terms of its strength in deterring buyers from a BEV. To address this concern, trusted mass-market brands can emphasize their reliability heritage, balancing innovation with reassurance.

Encouragingly, several major barriers—charge time, inconvenience of recharging, access to public charging, purchase/lease price—soften in 2026, indicating gradual progress as the market moves through adoption.

BEV Price Parity

Price Perceptions Move The Wrong Way

BEV price premiums relative to gas vehicle prices is a major adoption barrier. While actual price parity has come closer in recent years, perceptions are moving in the opposite direction.

Affordability is becoming a greater concern as the price perception gap between BEVs and gas vehicles widens. In May 2024, 38% of buyers said that EVs have become even more expensive than gas vehicles. When asked again in December 2025, even more (41%) shared this sentiment. The discontinuation of the federal EV tax credit may have contributed to this shift.

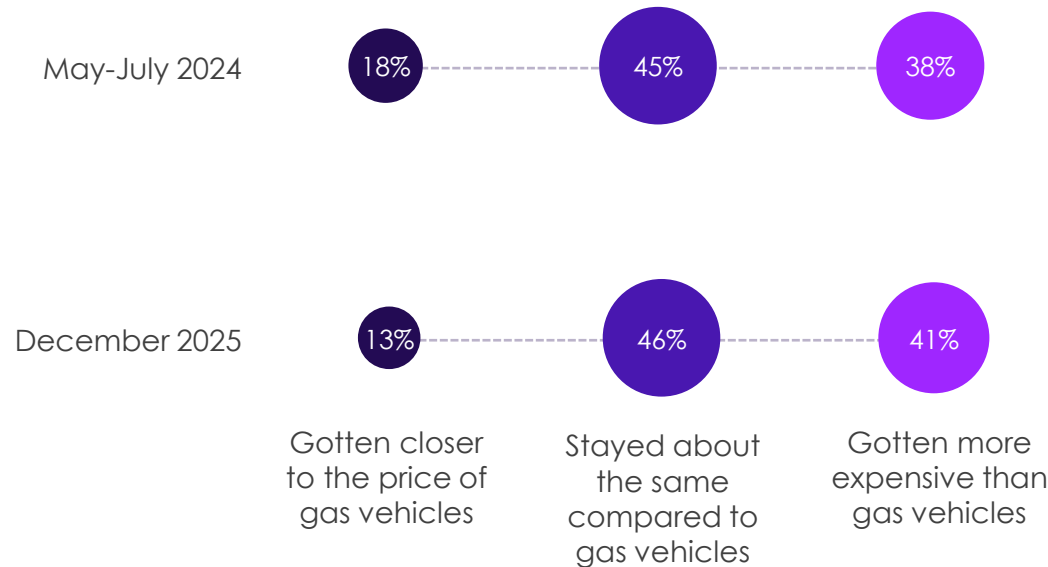
Many buyers (42%) expect BEVs to cost 20% or more above a comparable gas vehicle, even though actual price differences tend to be smaller. This perception gap reinforces price as a barrier and deters otherwise interested buyers.

Encouragingly, many automakers plan to introduce more affordable BEVs, which could begin to reset price perceptions. However, automakers need to make sure they get the word out when BEV prices are in line with gas counterparts.

Correcting inflated price assumptions, and reframing value beyond the sticker price (lower operating cost, less maintenance, longer term loans), is critical to overcoming affordability-driven hesitations.

Value-seeking buyers may not be anti-BEV, rather they require a clear and credible total-cost-of-ownership picture—that includes the total purchase price, the cost to recharge at home and in public, maintenance costs, and potential repair costs—to move them from interest to intent.

OVER THE PAST 6 MONTHS, THE PRICE OF EVS HAS...



Home Electricity Bill

Electricity Bill Anxiety Gap

Affordability concerns are again fueled by a mismatch between perception and reality. Though it is plausible that non-BEV owners have this misconception amidst rising home energy costs, it is nonetheless a mismatch.

Roughly half of current BEV owners report only a slight increase in their home electricity bill, while many non-BEV owners expect their bill would rise significantly. This perception gap adds to BEV affordability concerns that deter adoption.

Of note, there seems to be confusion about operating costs. Shown on a following slide, nearly two in three believe

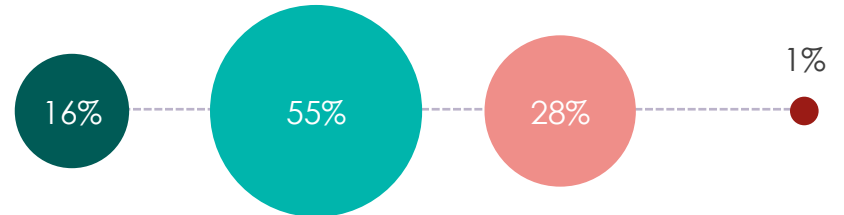
recharging a BEV is cheaper than refueling a gas vehicle, yet many still expect a significant increase in their monthly electricity bill. This tension may explain why the perceived benefit of lower operating costs has steadily weakened since 2020 (shown on the following slide).

It's also possible that uncertainty about how charging affects household expenses, rather than an actual cost comparison, is causing this mismatch.

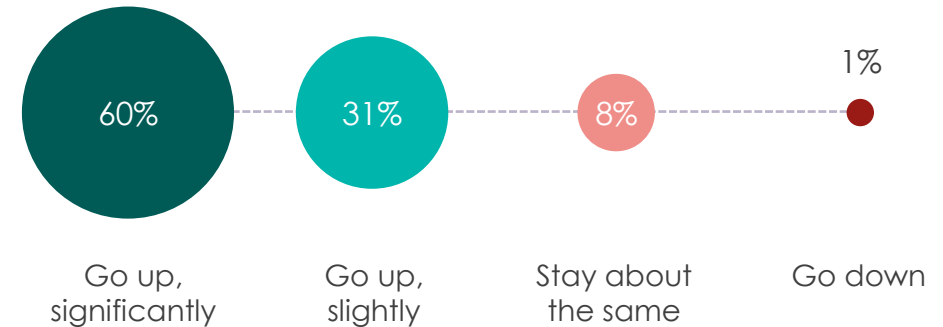
This highlights an opportunity where education can ease concerns and overcome an important BEV adoption barrier.

HOME ELECTRICITY BILL WITH BEV

Since purchasing a BEV, owner's home electricity bill has...



Non-BEV owners think that charging at home will cause their home electricity bill to...



BEV Benefits

Tech Benefit For The Win

The perceived benefit of lower operating cost has weakened significantly since 2020. This decline aligns with rising U.S. residential electricity prices, which increased from roughly 13¢/kWh in 2020 to 17¢/kWh in 2025, a 31% increase.* Although the benefit has decreased over the years, it is still the top expected benefit and is how many rationalize BEV value.

Environmental benefits and reduced dependence on fossil fuels are losing strength, indicating BEVs are no longer viewed as a sustainability panacea.

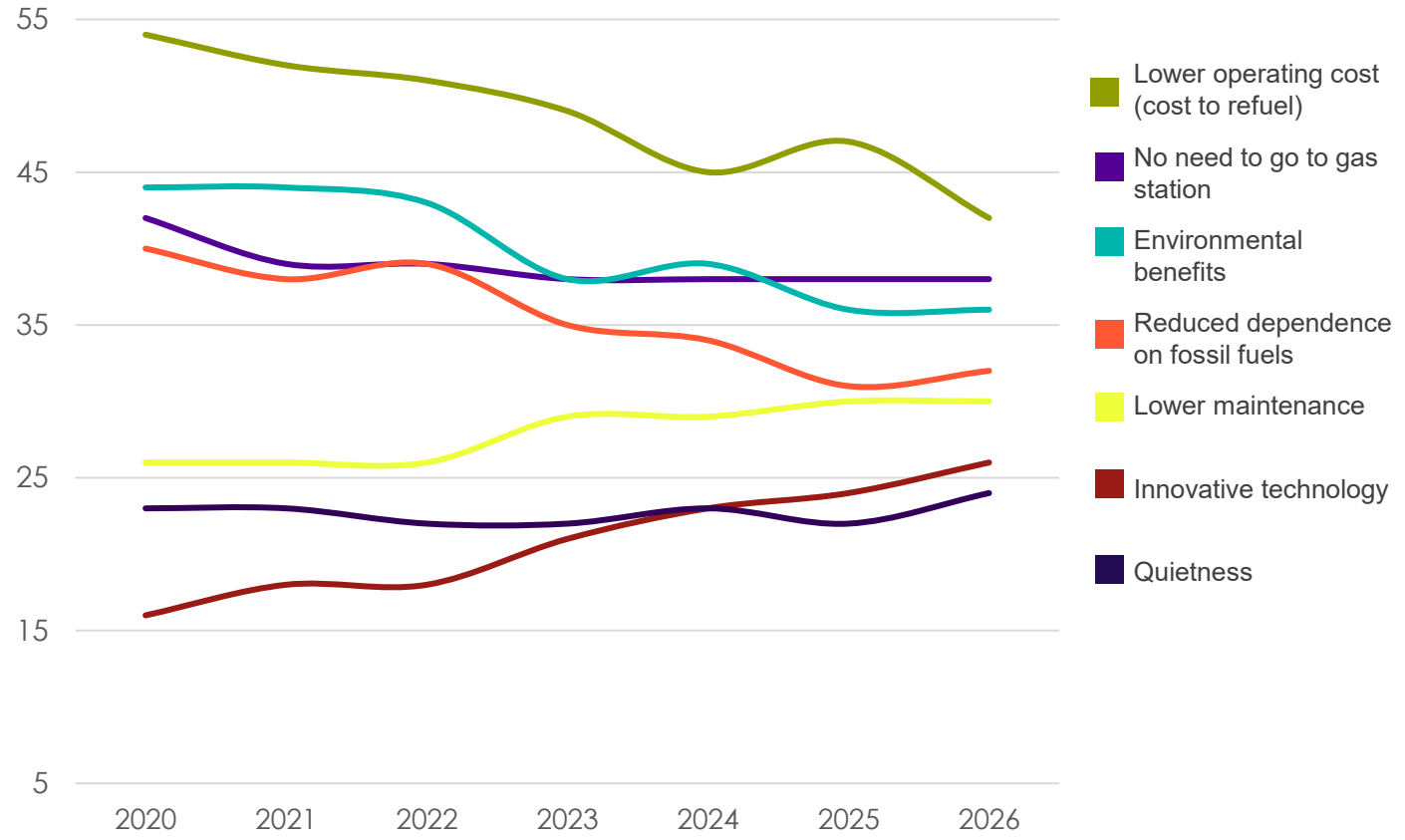
Avoiding gas stations continues to resonate, reinforcing everyday convenience as a stable appeal.

The benefit of lower maintenance gained traction in 2023 and then plateaued. Although it is the fifth-highest BEV benefit, many believe that BEVs are more expensive to maintain than gas vehicles (shown on the following slide), showing a disconnect and an opportunity where automakers can educate buyers about realistic maintenance costs.

Innovative technology has gained steadily (10 pts since 2020) and represents a clear opportunity to anchor BEV messaging.

Quietness has remained constant over the years and may be a missed messaging opportunity.

BEV BENEFITS (TOP 6)



BEV Statements

Confidence Breaks

The majority think BEVs are better for the climate than gas vehicles, but that benefit is not a primary purchase driver among the early majority.

Even though home energy prices are on the rise, BEVs are widely perceived as cheaper to fuel than gas vehicles. However, this advantage disappears when maintenance is considered. More buyers believe BEVs cost more to maintain, reinforcing maintenance and repair costs as a strong barrier. This sentiment may originate from “horror” stories about expensive BEV repairs.

Many buyers think there is not a BEV meets their needs, likely driven by concerns about range, charging,

affordability, and battery reliability.

Range and purchase price are major hurdles, with close to two in three saying BEV range is not adequate and BEVs are not affordable.

Public charging is viewed as a shortcoming, as many believe infrastructure is not keeping pace with BEV sales despite rapid real-world expansion, highlighting a persistent perception gap that continues to suppress confidence.

Battery life and replacement cost is a top-tier barrier, and roughly two in three believe that batteries are unreliable and will need replacement. Clear communication about real-world battery degradation can combat this sentiment.

NEGATIVE STATEMENT		POSITIVE STATEMENT	2026 NET	2025 NET
BEVs are worse for the climate than gas cars	30%	70%	40	-
Automakers are losing money on every BEV they sell	37%	63%	26	18
Refueling a BEV is more expensive than refueling a gas vehicle	37%	63%	26	-
BEVs are declining in popularity	39%	61%	22	28
BEVs are tough to find at dealerships	44%	56%	12	8
BEVs are more expensive to maintain than gas vehicles	56%	44%	-12	-
There is not any BEV out there that fits my needs	57%	43%	-14	-14
BEV range is not adequate	60%	40%	-20	-30
BEVs are not affordable	62%	38%	-24	-24
BEV batteries are unreliable and would need to be replaced a few times during the lifetime of ownership	64%	36%	-28	-
Automakers are struggling to sell BEVs	65%	35%	-30	-32
BEV sales are outpacing investment in public charging infrastructure	66%	34%	-32	-34

Willingness To Delay

Pull Forward Strengthens But Policy Uncertainty Looms In 2026

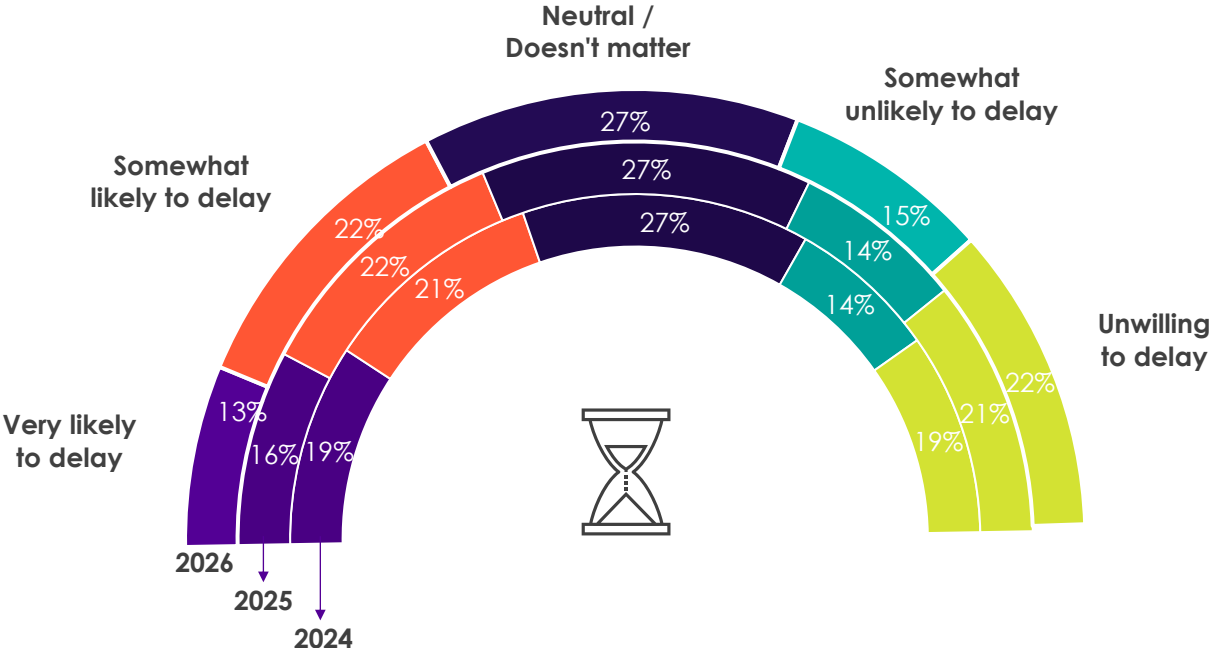
Product and charging improvements, as well as trying to take advantage of a limited-time incentive accelerated purchase readiness in the 2025 calendar year, but policy and economic uncertainty will likely push some buyers to delay their purchase in the 2026 calendar year.

Readiness to purchase a BEV without delay has been slowly rising since 2024, likely driven most notably by NACS port adoption, 300+ mile ranges becoming standard, and urgency to lock in the federal EV tax credit before its discontinuation. These advances reduce friction and pull purchase intent forward.

At the same time, the 2026 calendar year introduces headwinds that may encourage delay. Policy shifts under the Trump administration—the elimination of the federal EV tax credit, reduced funding for charging infrastructure, new tariffs that raise vehicle prices—introduce uncertainty and dampen momentum. Broader macro pressures, such as elevated interest rates, inflation, and affordability concerns, further reinforce hesitation.

Timing to purchase a new vehicle in the 2026 calendar year will likely be as much a macroeconomic decision as a product one.

WILLINGNESS TO DELAY NEXT PURCHASE FOR A BEV



BEV Brand Consideration

Opportunity Amid Tesla's Decline

While consideration for the battery electric powertrain increased in 2026, brand-level consideration declines or is flat across all automakers. This softening is likely influenced by survey design. Six additional brands were added to the brand consideration question in 2026, resulting in more dispersed brand selections.

Toyota continues to lead BEV brand consideration, followed by Tesla. However, Tesla experiences the largest decline in consideration, consistent with its global sales slowdown in the 2025 calendar year.

The March 2025 Newsletter in [Enlyta](#)

explores the opportunity that competitors have to capture disaffected Tesla intenders. Toyota, Ford, and BMW are best positioned to benefit. Chevrolet, Mercedes-Benz, Honda, Lexus, and Hyundai are also in contention but need to move more aggressively to close the gap. Strategies that can help put these brands on buyers' radar include:

- Including a home charger and installation with the purchase of a BEV
- Opening more public charging locations (ex. Ionna)
- Improving in-vehicle technology

BRAND CONSIDERATION		2025	YOY CHANGE
	2026		
Toyota	33%	36%	-3
Tesla	26%	31%	-5
Honda	23%	26%	-3
Ford	22%	24%	-2
Chevrolet	19%	22%	-3
BMW	15%	16%	-1
Hyundai	14%	15%	-1
Lexus	14%	16%	-2
Nissan	14%	15%	-1
Kia	13%	14%	-1
Mercedes-Benz	13%	14%	-1
Subaru	13%	15%	-2
Audi	12%	14%	-2
Jeep	11%	11%	0
GMC	10%	11%	-1
Cadillac	9%	10%	-1
Volkswagen	9%	11%	-2
Acura	8%	10%	-2
Rivian	8%	9%	-1
Volvo	8%	10%	-2
Genesis	7%	7%	0

Prospects For Used BEVs

Confidence Drives Used BEV Consideration

There is openness to considering a used BEV as a more affordable entry point, but perceived risk is a significant barrier. Compared to used gas vehicles, used BEVs are seen as riskier.

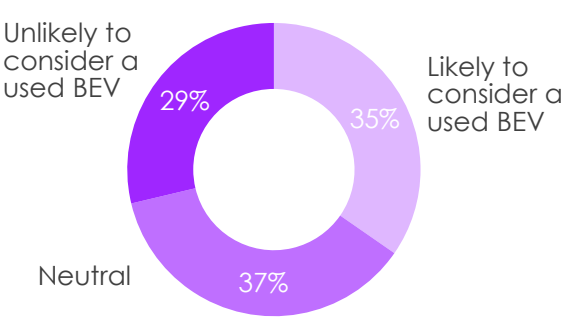
Battery life and replacements costs and maintenance and repair costs are key barriers that deter buyers from a BEV purchase. These concerns are heightened with a use BEV.

Automakers can reduce

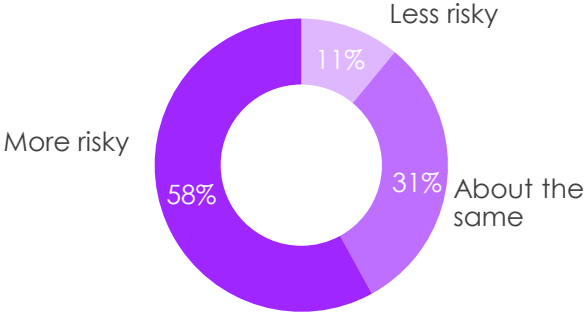
hesitation toward used BEVs by increasing transparency and reassurance, such as offering extended battery warranties, maintenance histories, and battery health reports. These proof points can make a used BEV feel like a safer purchase.

Openness to a used BEV varies by audience. Buyers with stronger BEV perceptions and intention would more likely consider used. These differences will be explored in the next section.

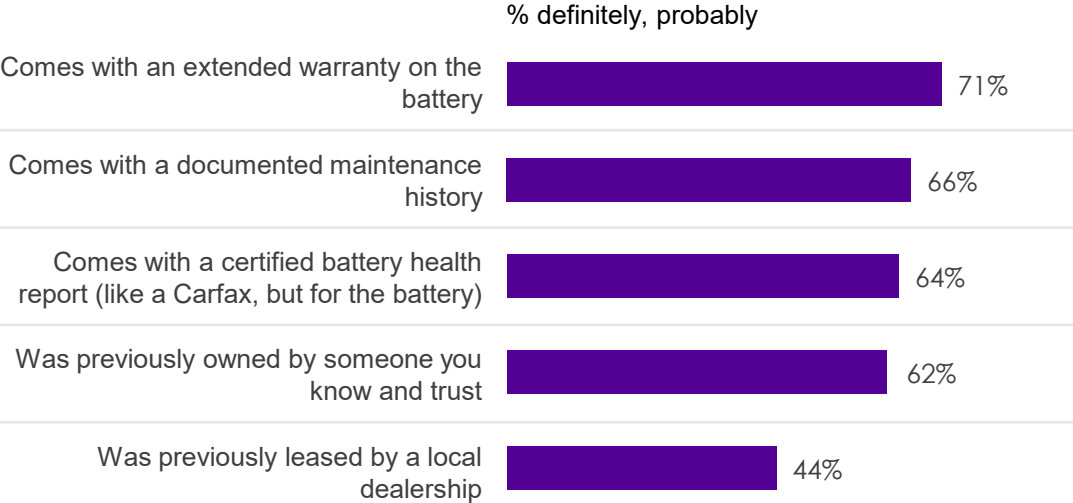
LIKELIHOOD TO CONSIDER A USED BEV



COMPARED TO A USED GAS VEHICLE, A USED BEV WOULD FEEL...



WOULD YOU BE MORE LIKELY TO BUY A USED BEV IF IT...





EV Intention →

EV Intention Groups

Out Of Resistant, Into Open

Escalent's team of data scientists developed a proprietary algorithm for EVForward used to score and predict each respondent's likelihood to adopt a BEV within the next 5 years. The algorithm classifies each respondent into one of four groups—EV Owner,

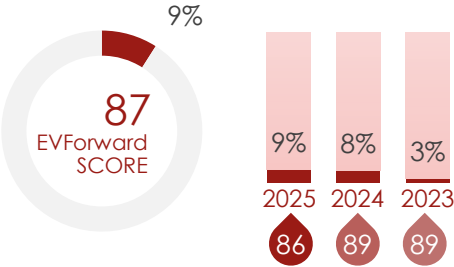
EV Intender, EV Open and EV Resistant—correlating to increasing EVForward scores as new car buyers come closer to EV adoption.

In 2026, buyers are moving out of Resistant and into Intender and Open.

Below shows each group as a % of new car buyer population

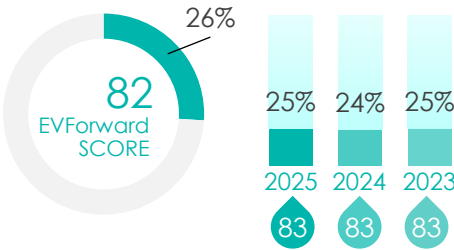


EV OWNER



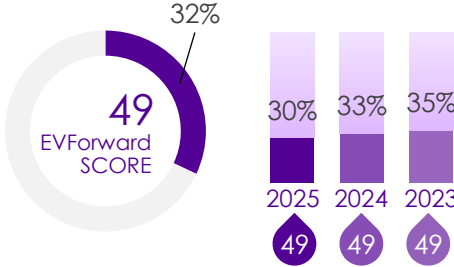
Currently own an EV

EV INTENDER



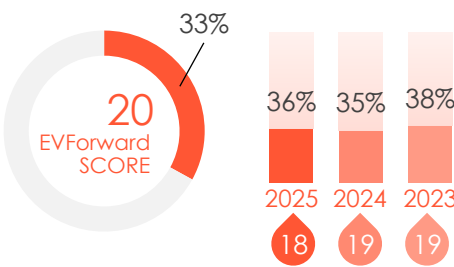
Likely to shop for a BEV as their next vehicle

EV OPEN



Open to BEV but unlikely to shop for one as their next vehicle

EV RESISTANT

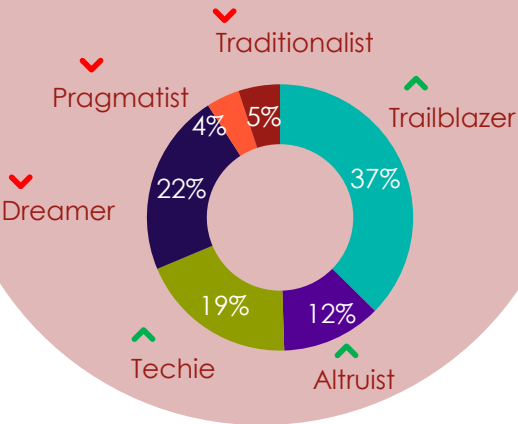


Rank lowest in EV purchase intention

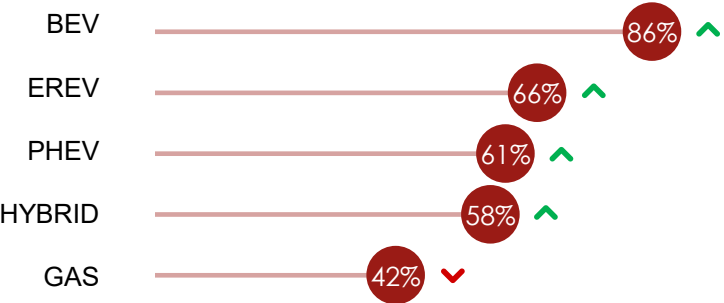
EV INTENTION GROUP:
EV Owner

9% of
sample

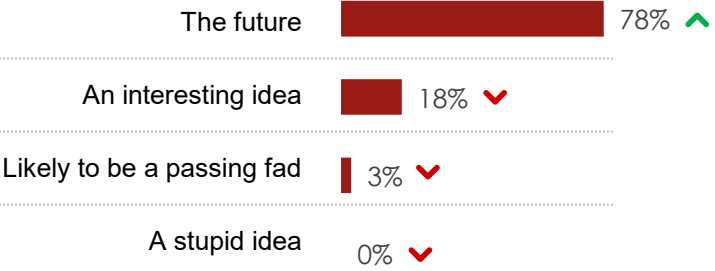
Car and technology enthusiasts. Care about performance, and in-vehicle and powertrain technology. Think BEV is the future and will likely buy another. BEV capabilities mostly meet their needs, but they still expect continuous technology advancements, more appealing offerings, and improvements to the public charging ecosystem



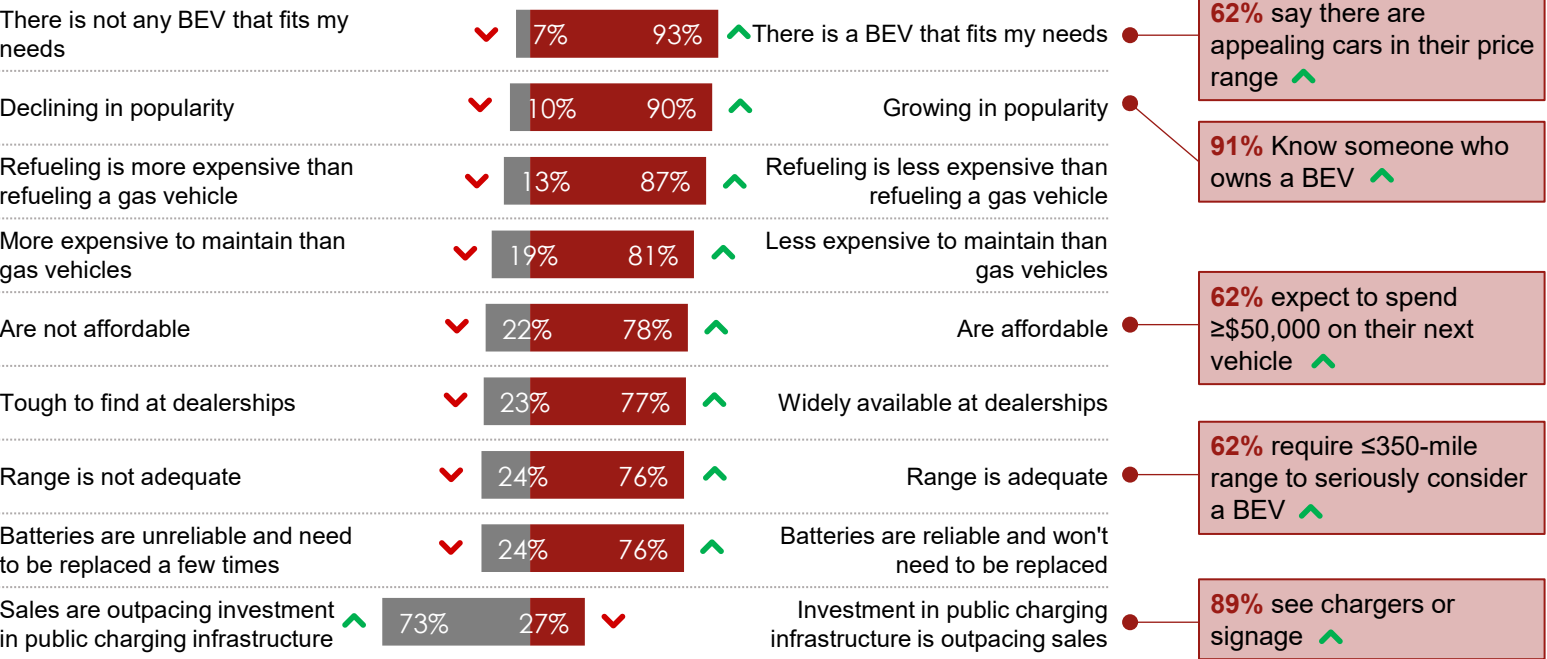
POWERTRAIN CONSIDERATION



BEV PERCEPTIONS



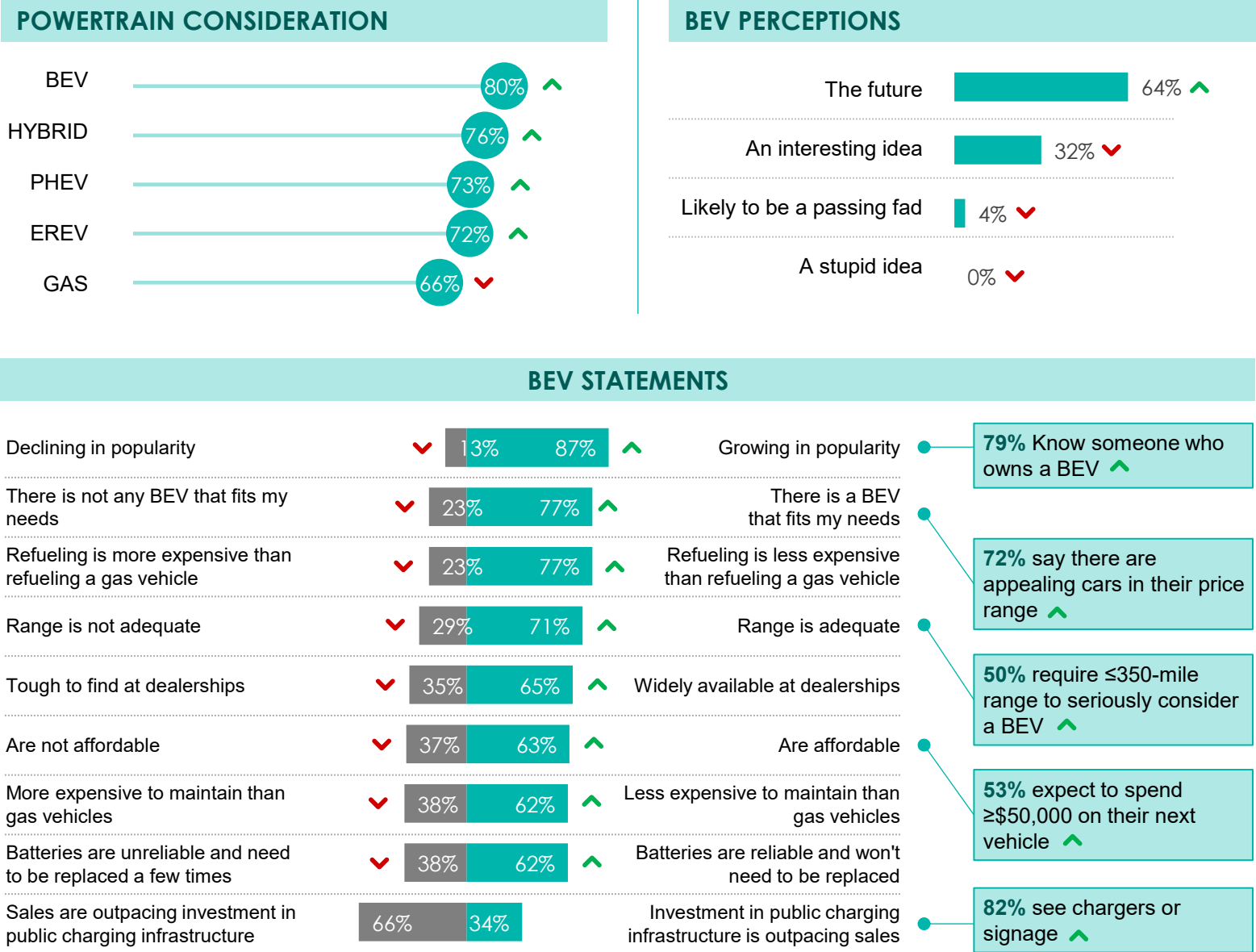
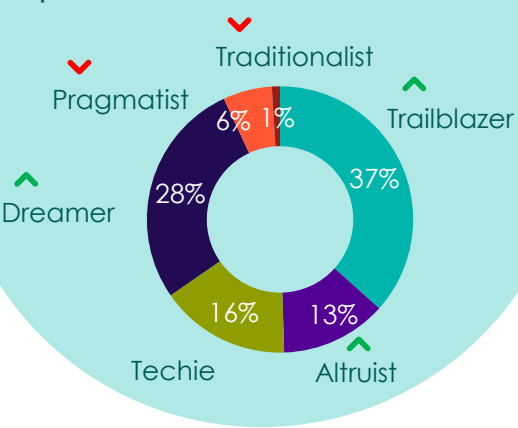
BEV STATEMENTS



EV INTENTION GROUP:
EV Intender

26% of
sample

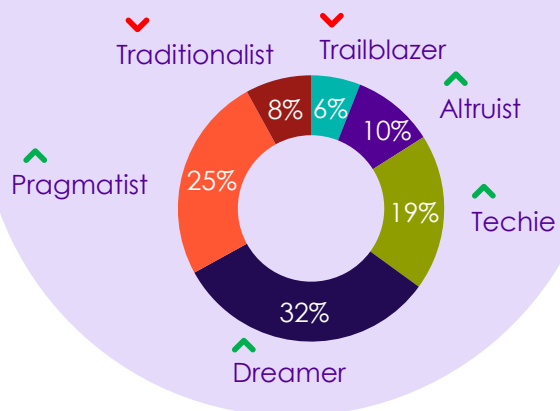
Most think BEV is the future; the powertrain is a top contender. Will likely cross-shop other alt powertrains, so concerns about BEV could dampen adoption and push them to another alt powertrain. Associated costs are concerning, so lead with ownership and energy savings and pre-owned offerings with assurances that mitigate perceived financial risk



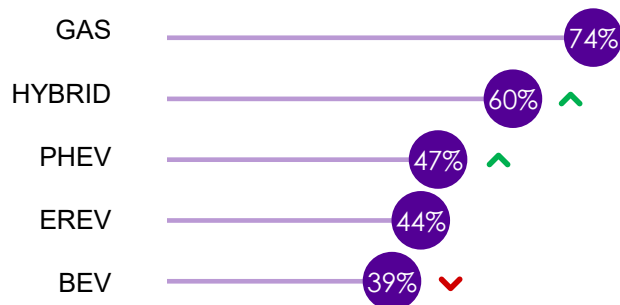
EV INTENTION GROUP: EV Open

32% of
sample

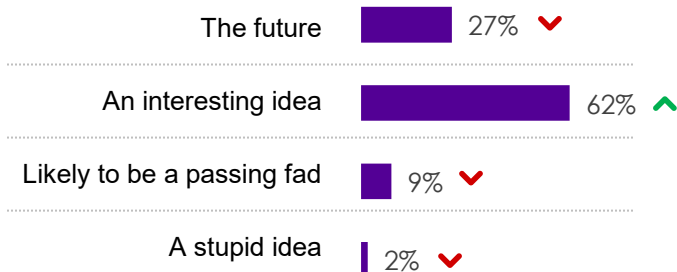
Intend gas, but hybrid and PHEV cross their mind and offer a low-risk way to stay modern without the concerns of a full electric powertrain. BEV still needs to prove itself and currently doesn't meet their needs (price, charging, range). Not anti-BEV, but they don't think ownership is practical yet. Need to see value before they would consider adopting



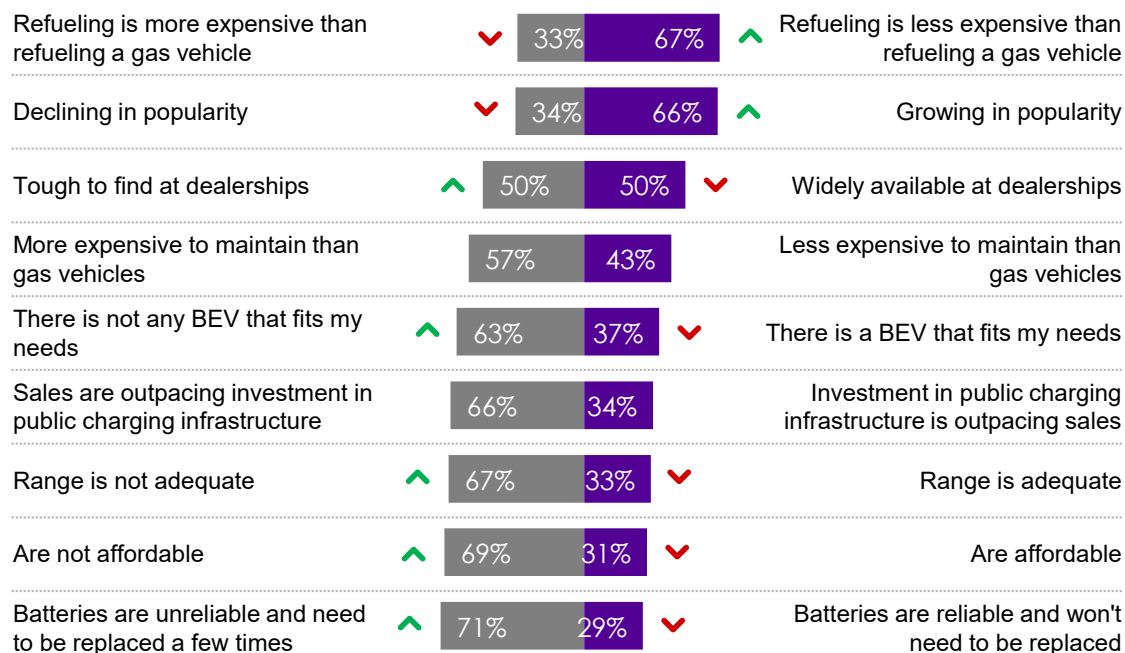
POWERTRAIN CONSIDERATION



BEV PERCEPTIONS



BEV STATEMENTS



49% Know someone who owns a BEV ↓

45% say there are appealing cars in their price range ↓

64% see chargers or signage ↓

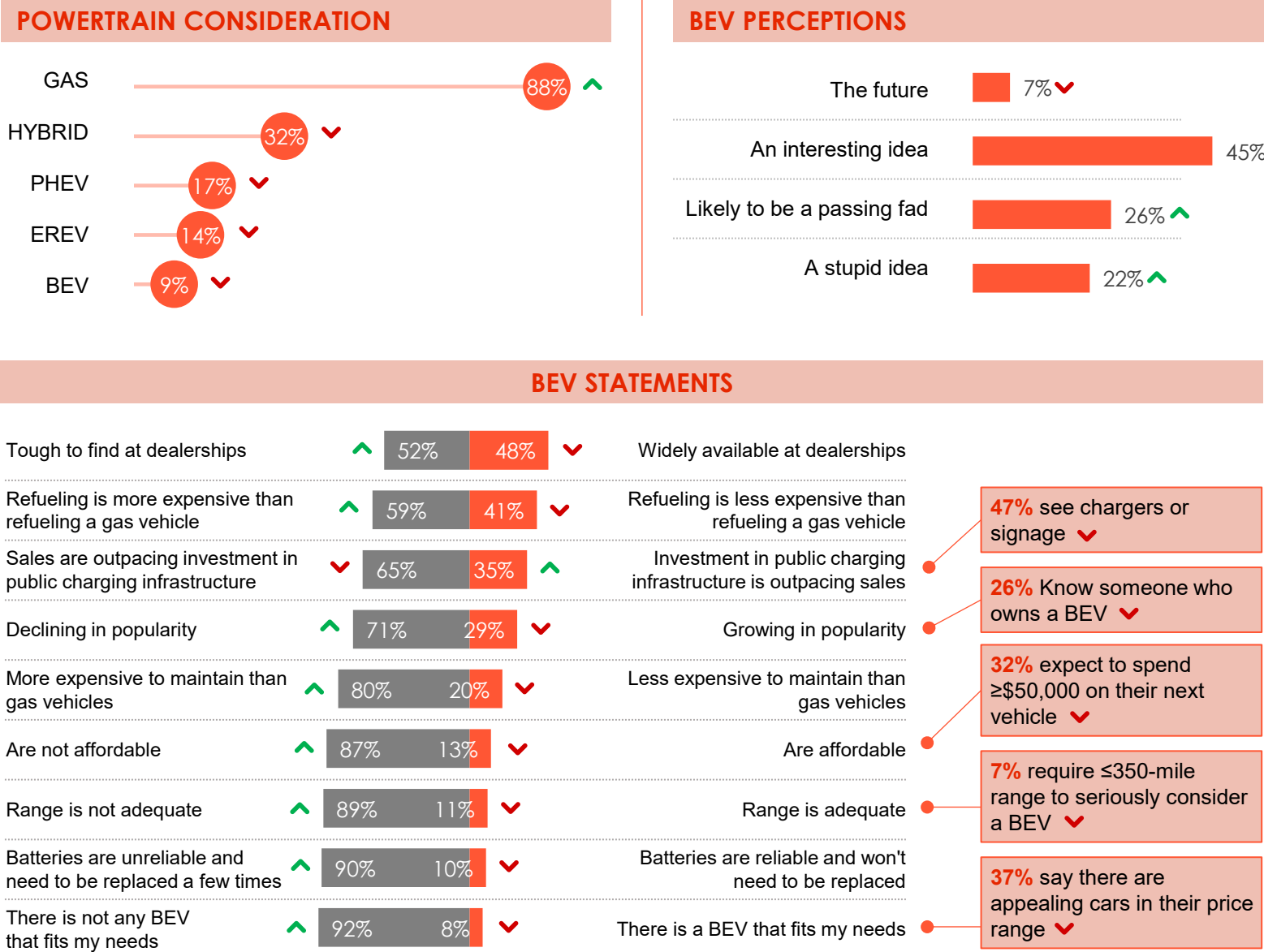
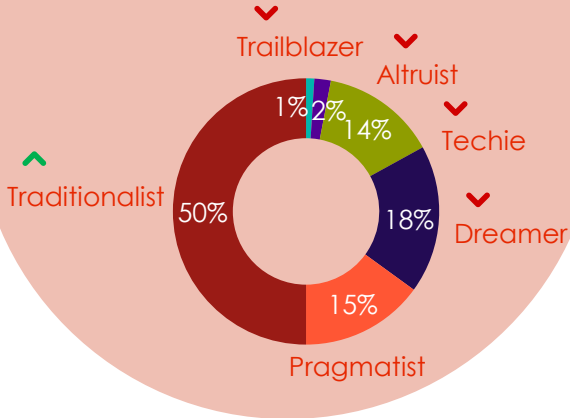
25% require ≤350-mile range to seriously consider a BEV ↓

35% expect to spend ≥\$50,000 on their next vehicle ↓

EV INTENTION GROUP: EV Resistant

33% of sample

Intend gas only. Plurality think BEV is interesting idea, but many think it's stupid or a fad. Sentiments toward BEV and other alt powertrains have remained relatively unchanged over the years. Hybrid may be a possible in-road to electrification, but it's highly unlikely that they would consider any plug-in option



BEV Perceptions

Widening Powertrain Options

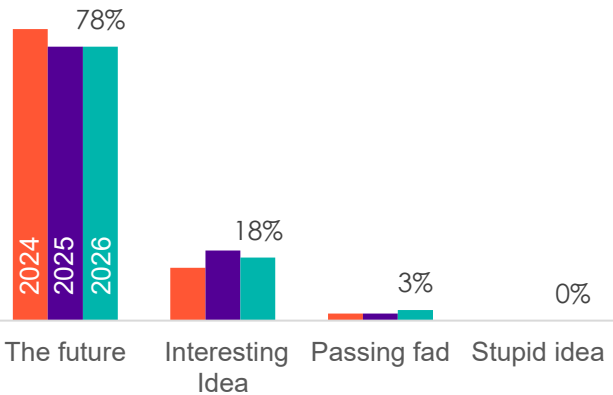
Perceptions of BEVs as “the future” continue to soften among EV Intenders and EV Open in 2026, but this does not translate into weaker consideration. BEV stated purchase intent is stable among both EV Intenders and EV Open.

Among EV Owners, EV Intenders, and EV Opens, stated purchase intent for all powertrains (BEV, PHEV, hybrid, gas) is consistent or increases in 2026. This suggests that softening BEV perceptions reflect broader openness to various powertrain options rather than disengagement from BEVs.

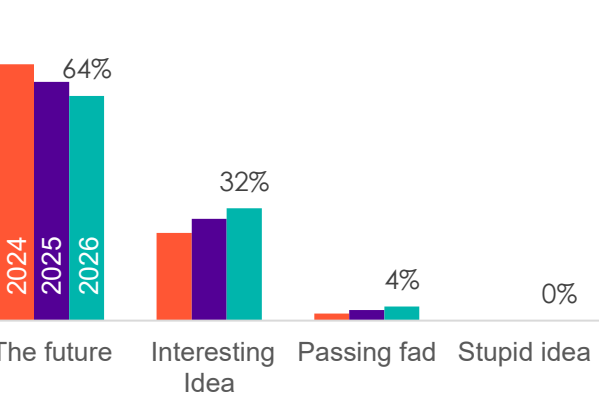
The market is in the “messy middle.” An expanding set of powertrain choices, uneven availability across segments and models, and increasingly complex tradeoffs are creating choice overload as consumers try to determine which option best fits their needs. Automakers are faced with the challenge of meeting buyers at different stages on their electrification journey and offering the right mix of powertrains across segments and models.

BEV PERCEPTIONS

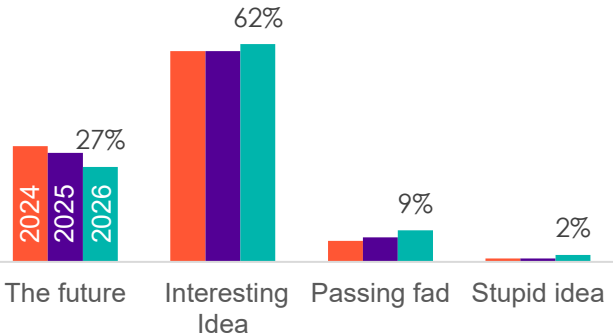
EV OWNER



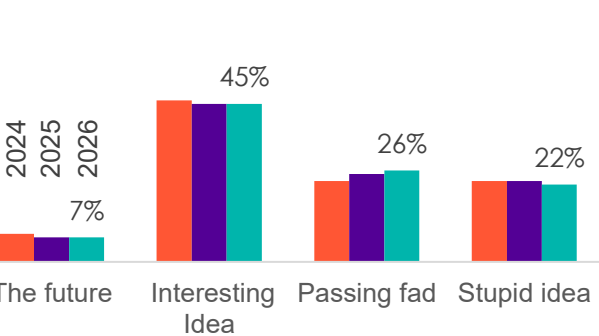
EV INTENDER



EV OPEN



EV RESISTANT



PHEV Perceptions

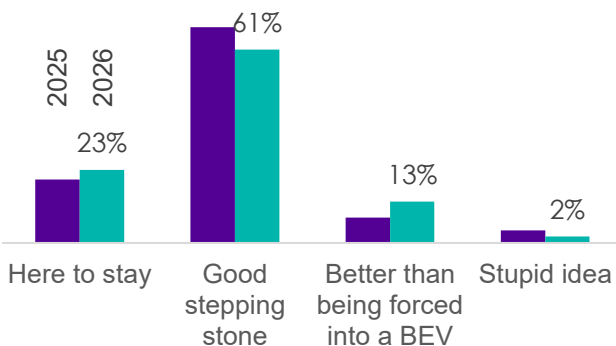
Multi-Powertrain Future Takes Shape

Perceptions of PHEVs are shifting. EV Owners and EV Intenders increasingly think that PHEVs are “here to stay” and the share viewing PHEVs as a “stepping stone” is softening. Most still see PHEVs as a bridge toward a fully electric future, but they increasingly envision a future where BEVs coexist alongside other powertrain options rather than fully replacing them.

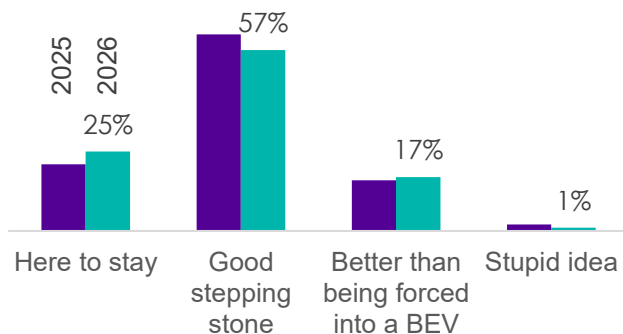
In the near term, hybrids and PHEVs function as an on-ramp to electrification. EV Intenders and EV Open can access some electrification benefits without confronting BEV-specific concerns. At the moment, BEVs fail to meet the needs and desires of EV Open.

PHEV PERCEPTIONS

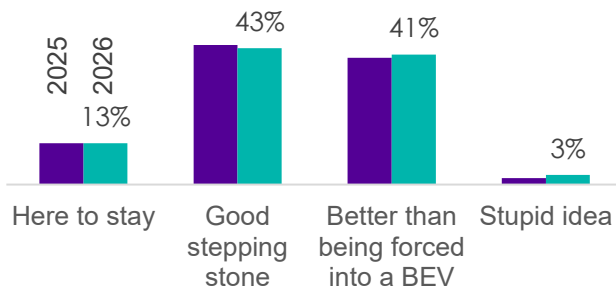
EV OWNER



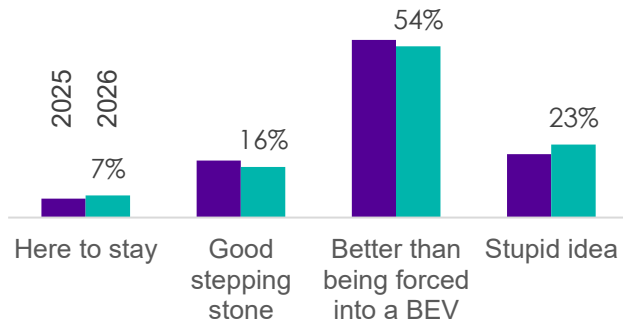
EV INTENDER



EV OPEN



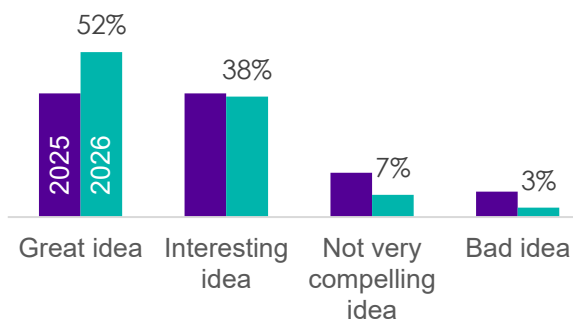
EV RESISTANT



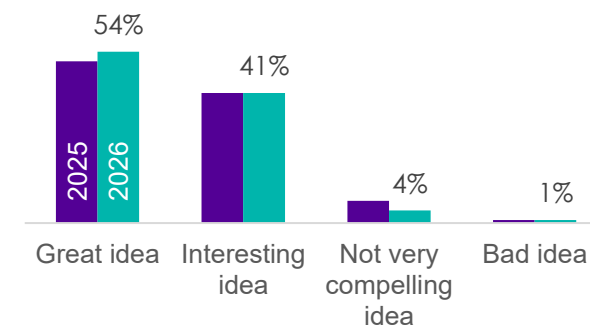
EREV Perceptions

EREV PERCEPTIONS

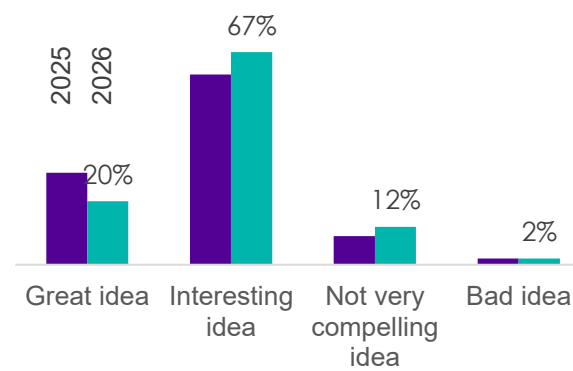
EV OWNER



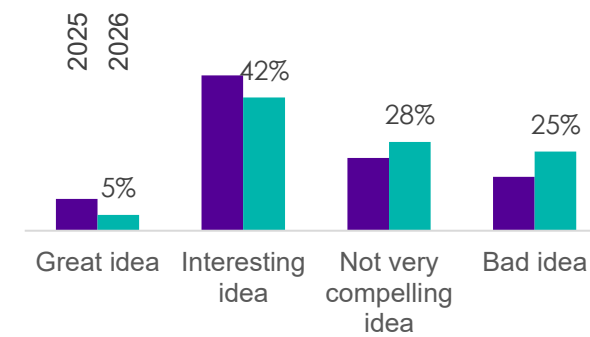
EV INTENDER



EV OPEN



EV RESISTANT

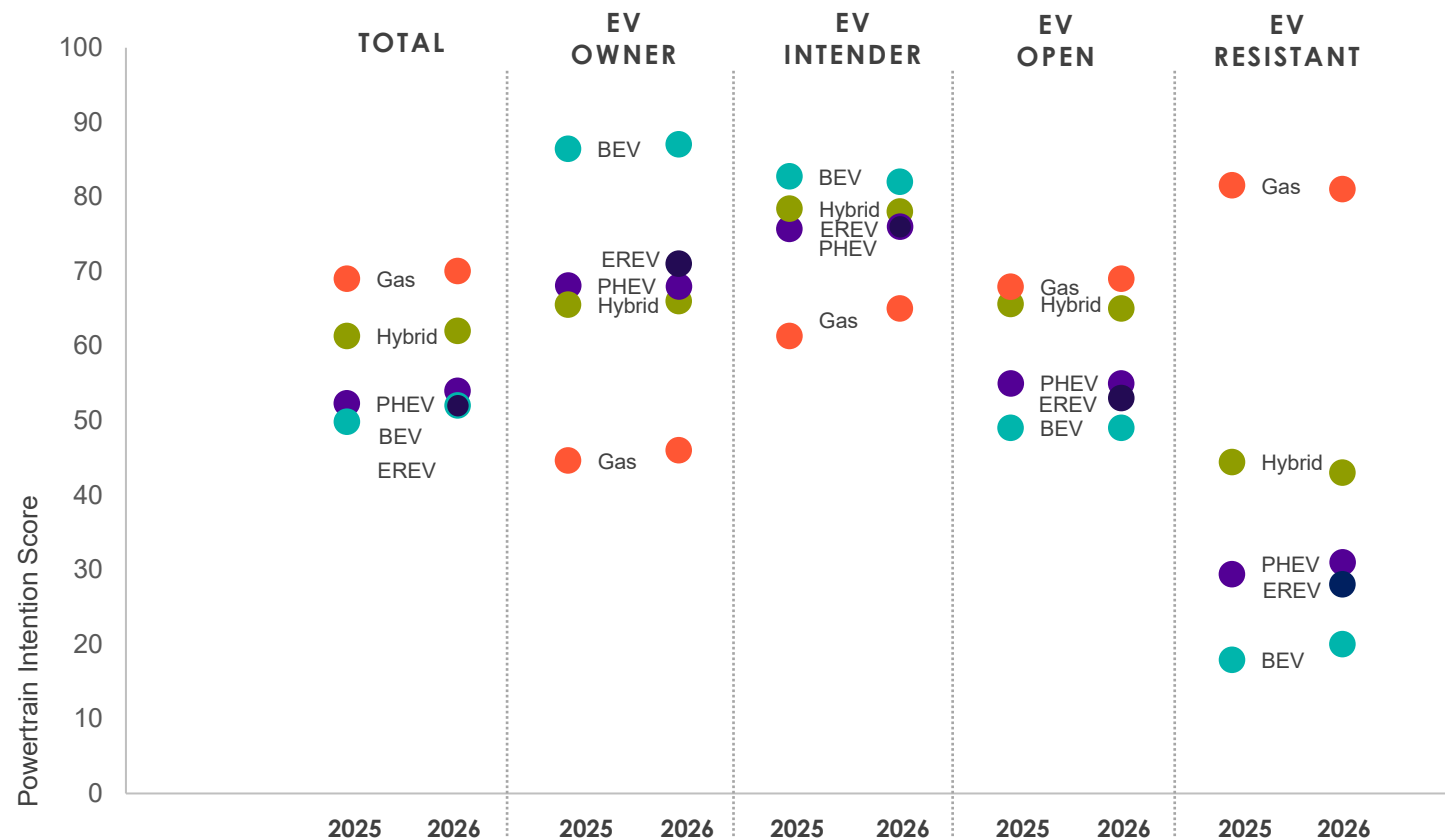


A New Path In Electrification

EREVs are gaining traction among EV Owners and EV Intenders, with more viewing them as a great idea that they would consider. Overall, these groups see EREVs as either a “great” or “interesting” idea, valuing them as a hybrid-like solution that delivers mostly electric driving while retaining a gas backup for reassurance.

EV Open are warming to EREVs as an interesting idea but they need more information and clarity to move them from curiosity to consideration.

Powertrain Intent



Powertrain Choice Gets Crowded

The growing “messy middle” of powertrain choice becomes more evident in 2026, as purchase intent increases across all powertrains. EREV, introduced to the study in 2026, clusters closely with other plug-in options and adds another layer to an already complex decision set.

Among EV Owners, BEV and gas purchase intent increase slightly and hybrid and PHEV are consistent. BEV still holds a considerable lead.

Among EV Intenders, gas purchase intention rises 4 pts, a concerning shift when paired with a 1 pt decline in BEV intent. PHEV and hybrid are consistent. This may show how expanded choice and friction can cause some shoppers to hesitate or backslide away from full electrification. BEV, Hybrid, PHEV and EREV are clustered even tighter in 2026, indicating that EV Intenders will cross-shop powertrains. Alternative powertrains still outperform gas, although now to a lesser extent.

Willingness To Delay

Delay Driven by Cost, Availability And Confidence

EV Intenders are most likely to delay their purchase for a BEV that meets their needs.

For both EV Owners and EV Intenders, financial considerations are their primary reason to delay. As previously shown, purchase price is an important factor, and higher purchase prices keep affordability front and center.

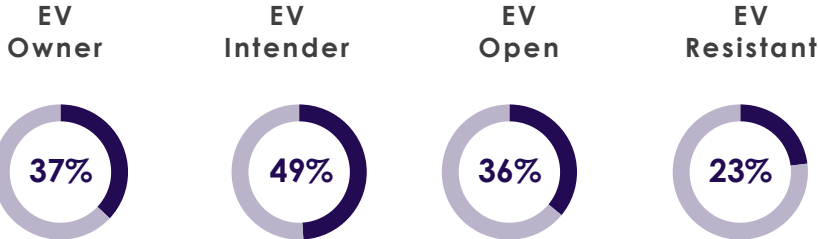
A sizable share of both EV Owners and EV Intenders also cite a lack of appealing options. While BEV capabilities may be sufficient, shoppers may not be finding a model in their preferred segment or brand.

EV Intenders also express a

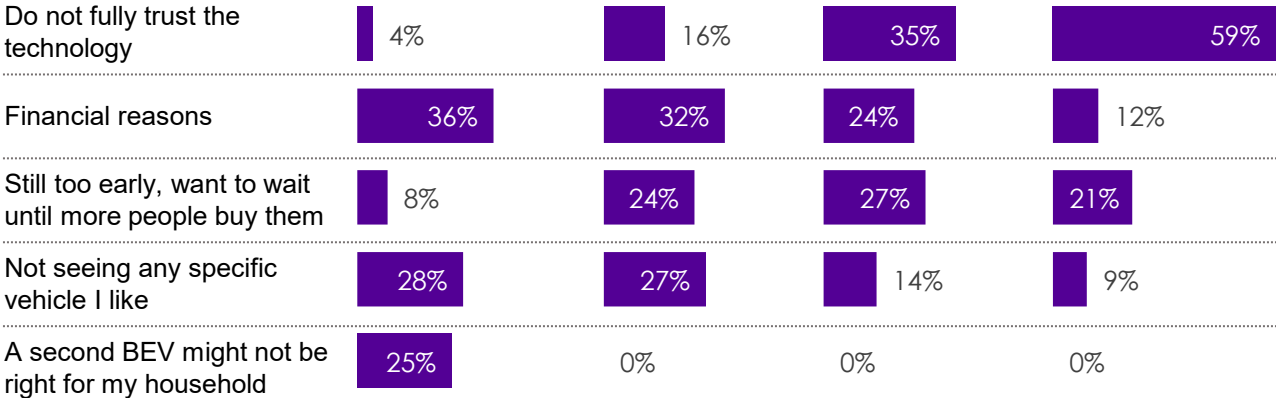
desire to wait and see broader market adoption. They want more proof that the BEV value proposition holds at scale before committing. Although most EV Intenders know BEV owners (63% know a few and 17% know many), they want more reassurance that BEVs have widespread market support. This confidence may be difficult to build amid current macroeconomic conditions and the rollback of pro-EV policies.

EV Open, and especially EV Resistant, more often say they will delay because they do not fully trust the technology. These groups are farther from adoption and current BEV capabilities do not meet their expectations.

Somewhat or very likely to delay buying their next vehicle until an EV that better meets their needs is available



REASON TO DELAY EV PURCHASE



Affordability

Affordability Defines BEV Readiness

Financial considerations are the primary driver of BEV purchase delays for both EV Owners and EV Intenders, with roughly one in three citing cost as a reason to wait.

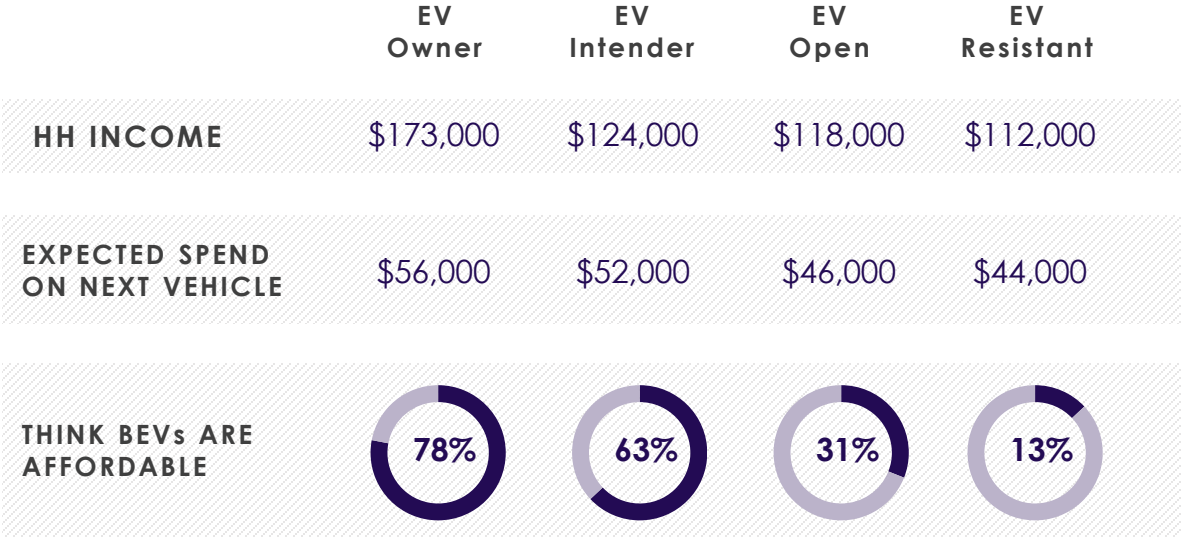
EV Owners are better positioned financially to purchase a BEV. With household incomes roughly \$50,000 higher than the average buyer, they have greater disposable income to withstand economic volatility and try new products. Their expected vehicle spend also aligns with typical BEV transaction prices, leading many EV Owners to view BEVs as affordable.

EV Intenders sit closer to the affordability threshold. While their household incomes are slightly higher than average, their expected spend falls just below the

typical price of a BEV. Consistent with this, about two in three consider BEVs affordable, suggesting that incentives like the former \$7,500 federal EV tax credit played a critical role in helping this group overcome financial hesitation.

As previously shown, there are other levers that automakers can use to overcome affordability barriers without lowering the sticker price, including 7-year loans and educating shoppers about lifetime ownership cost savings.

BEVs remain financially out of reach for most EV Open and EV Resistant. Their expected spend falls short of current BEV pricing and most believe BEVs are not affordable, making cost a defining barrier to adoption.



Tax Credit Dissolution

Sunset Of EV Tax Credit Removes Conversion Lever

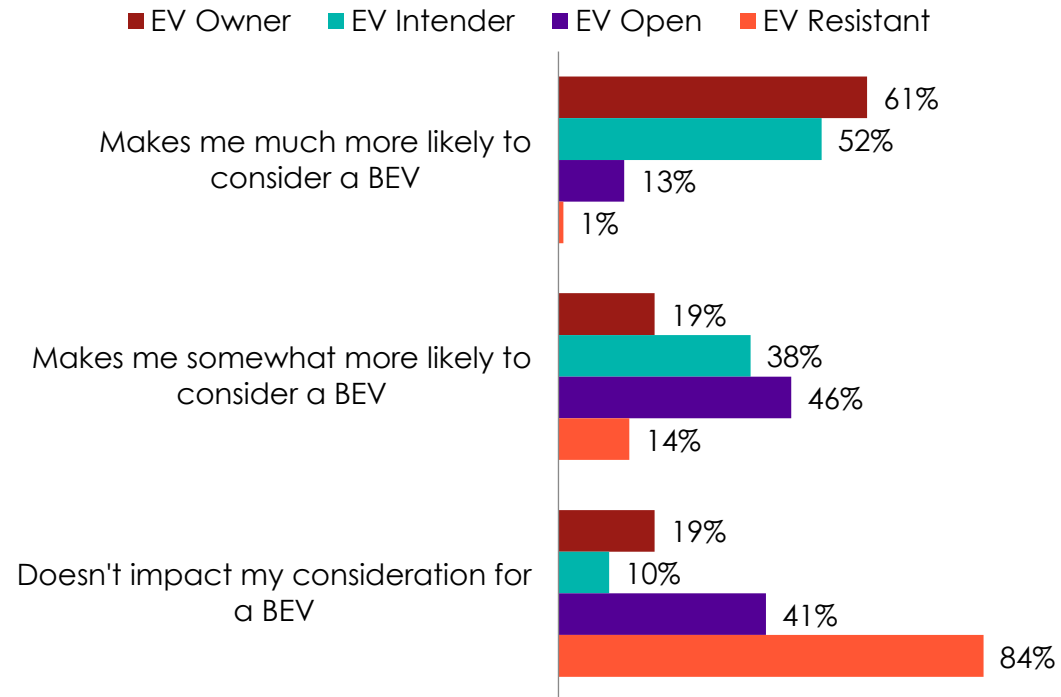
In July 2025, Escalent assessed the impact of the \$7,500 federal EV tax credit on BEV consideration. A majority of EV Owners and EV Intenders said the credit makes them at least somewhat more likely to consider a BEV.

As expected, EV Resistant overwhelmingly reported no

impact, as BEVs are largely outside their consideration set.

The federal EV tax credit has been a critical lever for BEV conversion. With its sunset in September 2025, automakers will need to identify alternative ways to attract interested buyers and offset the upfront purchase price barrier to sustain momentum.

IMPACT OF \$7,500 FEDERAL TAX CREDIT ON BEV PURCHASE CONSIDERATION



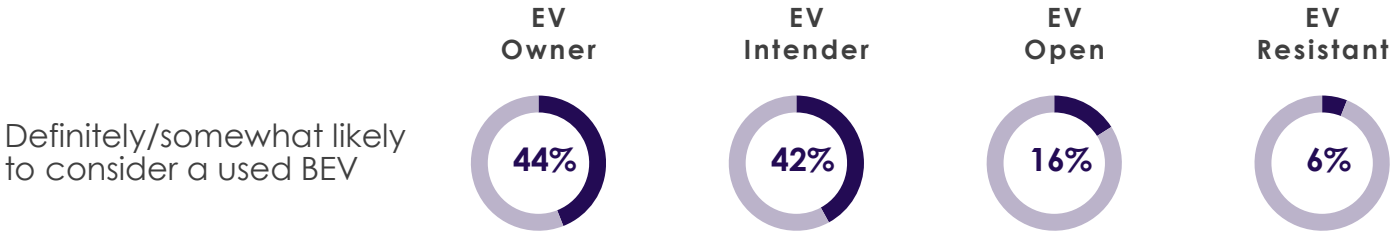
Prospects For Used BEVs

The Used BEV Tradeoff: Price vs. Risk

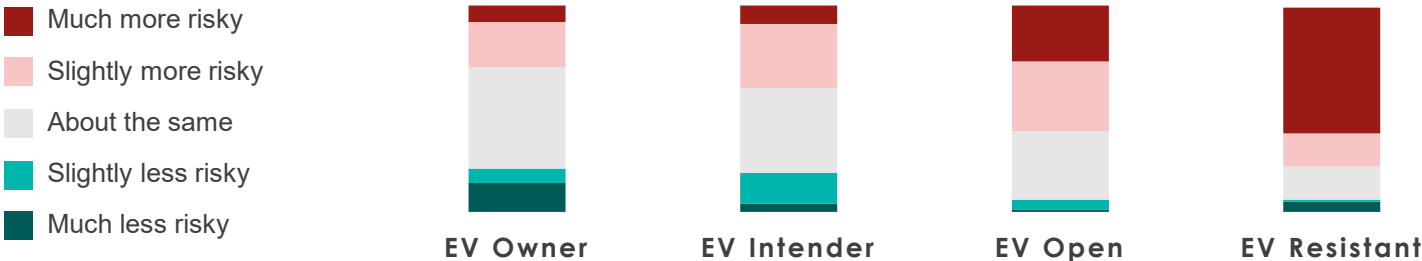
Used BEVs represent a potential affordability pathway, offering lower purchase prices for buyers interested in electrification.

A sizable share of EV Owners and EV Intenders say they would consider purchasing a used BEV, but perceived risk remains higher than with used gas vehicles.

Concerns likely center around battery durability and unknown maintenance history. These risks could be mitigated through extended battery warranties, transparent service records, and certified battery health reports, which would help build confidence and make used BEVs a more viable option for cost-conscious shoppers.



COMPARED TO A USED GAS VEHICLE, A USED BEV WOULD FEEL...



WOULD YOU BE MORE LIKELY TO BUY A USED BEV IF IT...

	EV Owner	EV Intender	EV Open	EV Resistant
Comes with an extended warranty on the battery	87%	89%	77%	44%
Comes with a documented maintenance history	91%	89%	69%	37%
Comes with a certified battery health report (like a Carfax, but for the battery)	85%	87%	68%	36%
Was previously owned by someone you know and trust	86%	79%	67%	37%
Was previously leased by a local dealership	62%	66%	44%	21%

BEV Availability Landscape

Right Specs, Wrong Vehicle

Difficulty finding a specific vehicle they want in their preferred segment and brand, rather than feeling that BEV capabilities are lacking, is another reason EV Owners and EV Intenders are likely to delay their BEV purchase.

Most say there is a BEV that meets their functional needs and they require a range under 375 miles, which some current models offer.

There is a meaningful distinction between a BEV that meets their capability needs and a BEV that shoppers genuinely want to buy.

When examining the top intended vehicle segments and

brands, clear gaps emerge in BEV model availability. These gaps are widening as automakers discontinue BEV models. For example, the discontinuation of Tesla Model S and X, Ford F-150 Lightning, and potentially the Honda Prologue, further reduce options.

All top intended legacy brands among EV Intenders currently have a BEV in their top intended segment, but there is still product whitespace in other segments.

Until the product matrix is filled in, many will remain in a holding pattern despite their readiness on BEV capabilities.

SEG6. Please read the following list of statements and indicate which you agree with more.
B7. What driving range would be required for you to seriously consider a Battery Electric Vehicle?
N2. What type of vehicle are you most likely to purchase next?
BR4. If you had to buy a new Electric Vehicle tomorrow, which brands that offer, or will soon offer Electric Vehicles would you seriously consider, if any?
Note: vehicle segment is based on internal EVForward segmentation

EV OWNER

There is a BEV out there that fits my needs



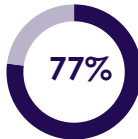
Required range

356

		Top 5 Brand Consideration				
		Tesla	Toyota	Ford	BMW	Mercedes-Benz
Top 5 Segment Intended		47%	30%	28%	27%	25%
Midsize SUV	17%		bZ & bZ Woodland	Mach-E		
Compact SUV	13%	Model Y	C-HR			
Midsize/Large Car	10%					
Luxury Midsize/Large SUV	9%	Model X			iX	EQE SUV & EQS SUV
Luxury Compact Car	8%				i4	

EV INTENDER

There is a BEV out there that fits my needs



Required range

374

		Top 5 Brand Consideration				
		Toyota	Tesla	Ford	Honda	Chevrolet
Top 5 Segment Intended		41%	40%	31%	28%	24%
Midsize SUV	21%	bZ & bZ Woodland		Mach-E	Prologue	Blazer
Compact SUV	11%	C-HR	Model Y			Equinox
Midsize/Large Car	11%					
Fullsize Pickup	10%		Cybertruck	F-150 Lightning		Silverado EV
Large SUV	10%					



Buyer Segmentation →

EV Buyer Personas

One Market, Multiple Mindsets

Altruists continue to gradually decline as a share of the new car buyer population, while Trailblazers and Dreamers increasingly fill the gap. Dreamers still represent the largest persona segment among new vehicle buyers.

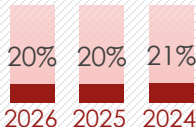
The below personas have different demographics, vehicle priorities,

expectations for their next vehicle, and openness to electrification. As a result, they are at different stages on their electrification journey, and in some cases they are pursuing entirely different paths. Some are drawn to advanced technology and style, while others prioritize value and practicality.

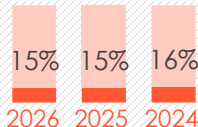
Because these personas are motivated by distinct needs, each will respond differently to messaging and product strategies.

The following slides explore demographics, key vehicle attributes, and powertrain perceptions across the personas.

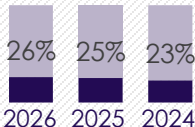
TRADITIONALIST



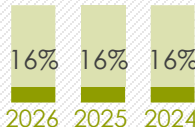
PRAGMATIST



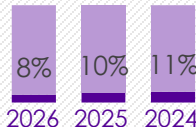
DREAMER



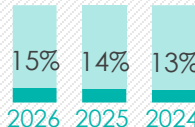
TECHIE



ALTRUIST



TRAILBLAZER



% of new car buyer population

Altruists In Focus



Altruist Population Is Shrinking

Environmental benefits are a core reason Altruists are drawn to BEVs, but concerns around value, quality, and practicality hinder adoption.

Altruists are deeply committed to their environmental values and recognize BEVs as a meaningful way to reduce environmental impacts. However, rising concerns around safety, reliability, purchase price, and the everyday realities of BEV ownership make those benefits difficult to justify.

At the same time, confidence that BEVs represent the single, best long-term solution seems to be softening, with greater openness to PHEV and EREV alternatives.

The pool of buyers driven to adopt a BEV primarily because of environmental benefits may be shrinking as certain BEV hesitations become more prominent and these buyers redirect their consideration to another alternative powertrain.

VEHICLE VALUES	2026	2025 DELTA
I would like to drive an environmentally friendly vehicle	100%	0
Climate change is a major problem facing the world today	96%	0
TOP 3 BEV BENEFITS		
Environmental benefits	72%	0
Reduced dependence on fossil fuels	52%	-4
Lower operating costs	50%	-5
TOP 3 BEV DETERRENTS FROM BEV PURCHASE		
Safety	63%	+13
Unknown reliability	62%	+4
Purchase/lease price vs. gas vehicle	59%	+3
PLUG-IN POWERTRAIN PERCEPTIONS		
BEVs are the future	57%	-7
PHEVs are here to stay	19%	+3
EREVs are a great idea	39%	+3

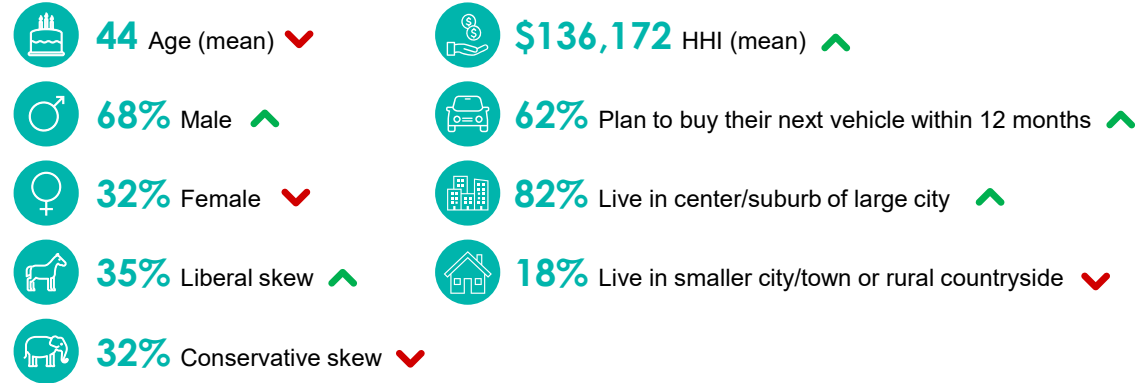
EV BUYER PERSONA: Trailblazer

15% of sample

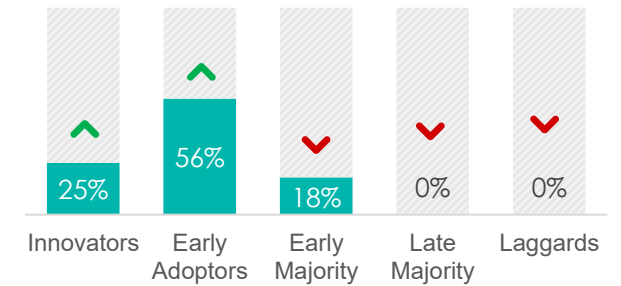


TRAILBLAZER IN FOCUS

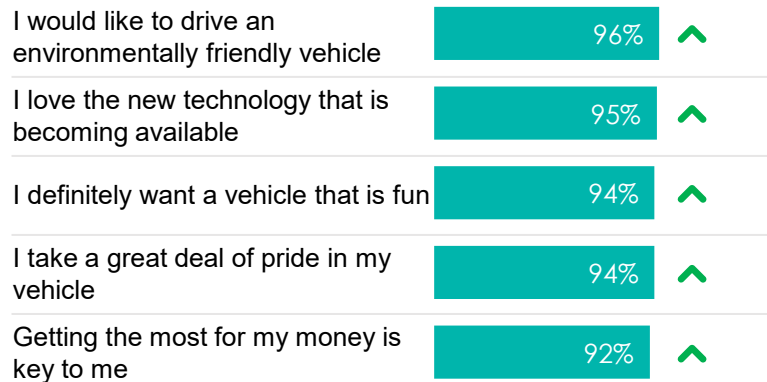
Trailblazers skew younger and male, with higher incomes, higher expected spend, and shorter purchase timelines, often living in urban or suburban areas. Tech-forward and environmentally motivated, they are performance-driven early adopters who see BEV as the future and largely believe current capabilities fit their needs. Less concerned about adoption barriers, they are drawn to BEV for technology and environmental benefits rather than cost or practicality. Performance matters when thinking about their next vehicle, but this attribute is not top of mind when thinking about a BEV, identifying a marketing opportunity. They will also consider other alternative powertrains.



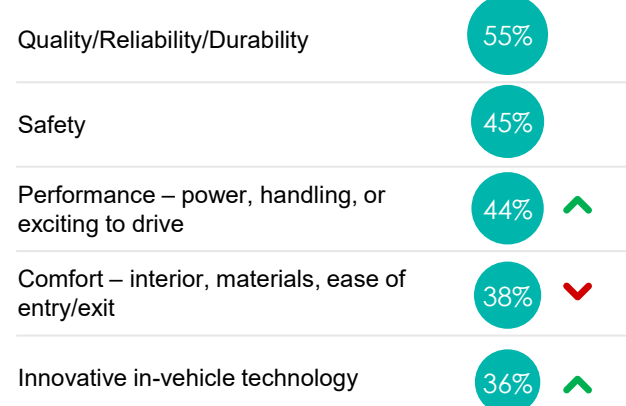
INNOVATION GROUP



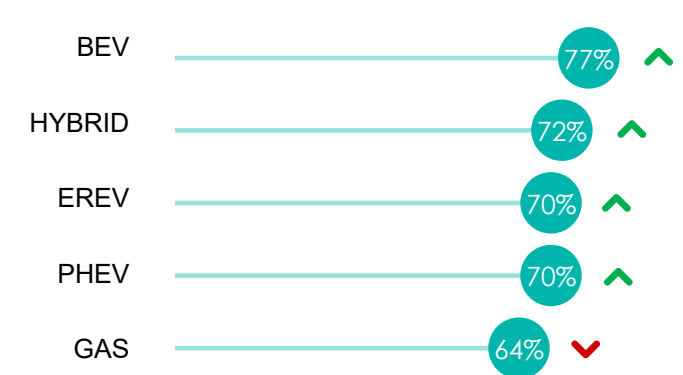
VEHICLE VALUES



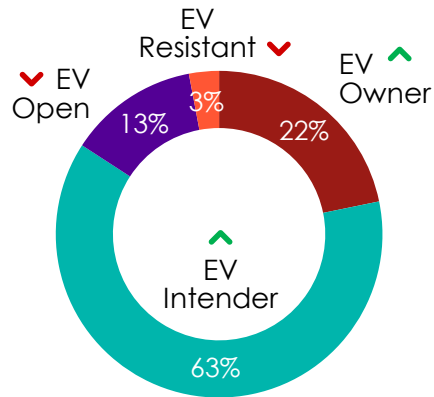
MOST IMPORTANT VEHICLE ATTRIBUTES



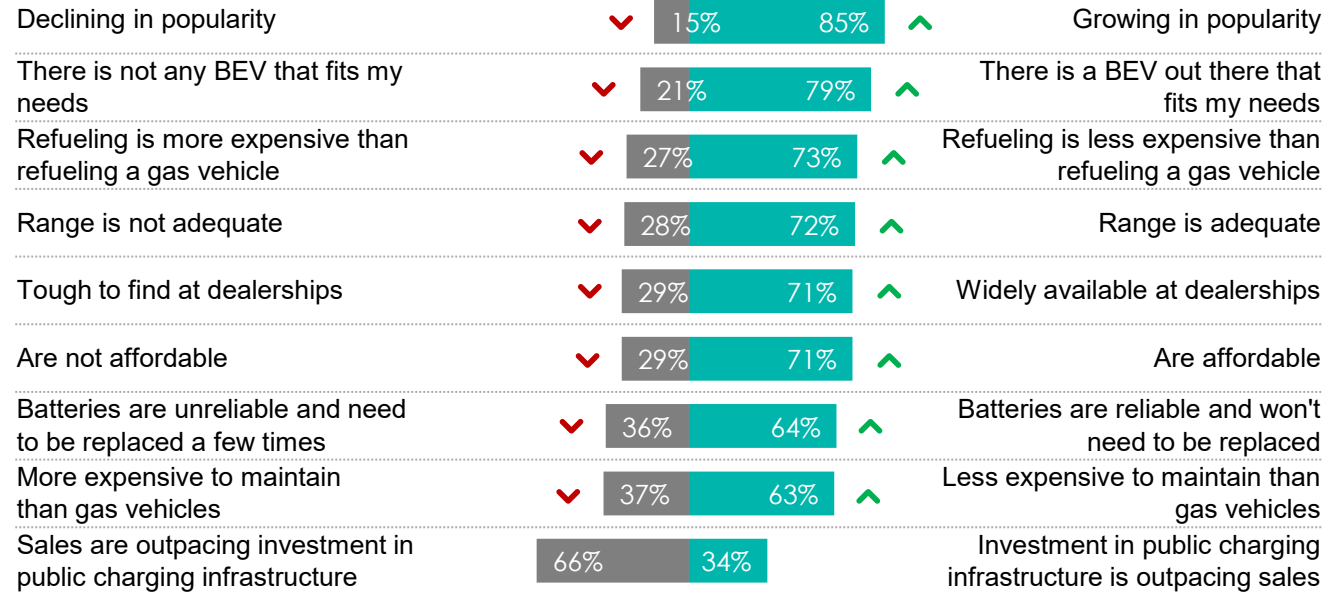
POWERTRAIN CONSIDERATION



EV BUYER PERSONA: Trailblazer



BEV STATEMENTS



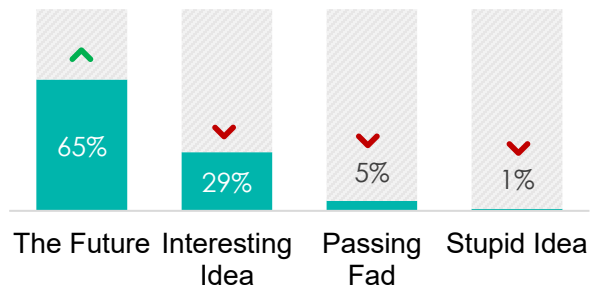
82% know someone who owns a BEV

51% require ≤350-mile range to seriously consider a BEV

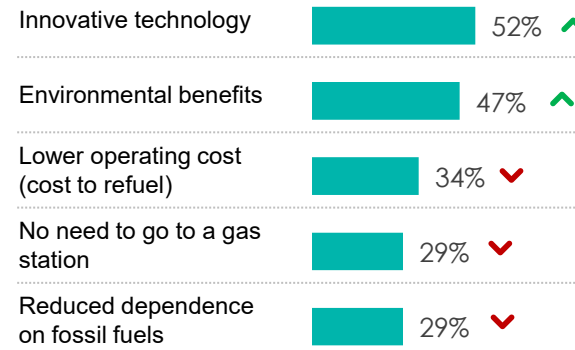
65% expect to spend ≥\$50,000 on their next vehicle

86% see chargers or signage

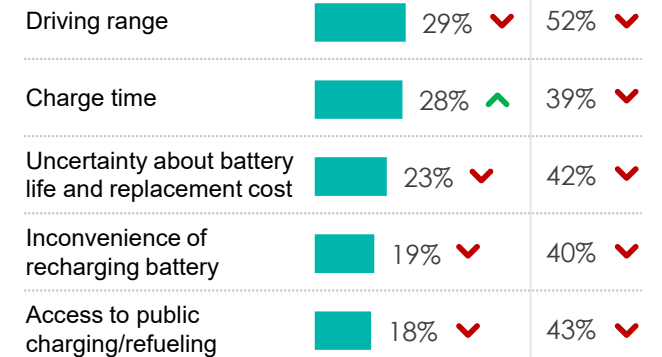
BEV PERCEPTIONS



TOP BEV BENEFITS



TOP BEV BARRIERS & STRENGTH OF BARRIER



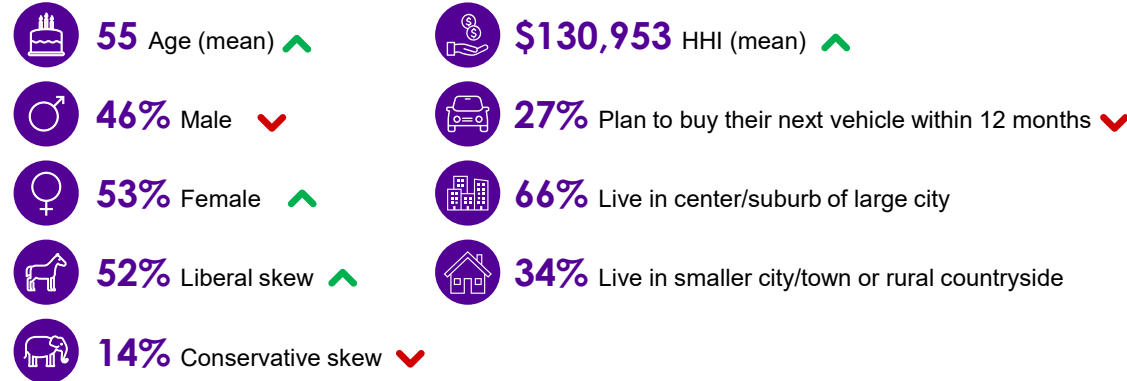
EV BUYER PERSONA: Altruist

8% of sample

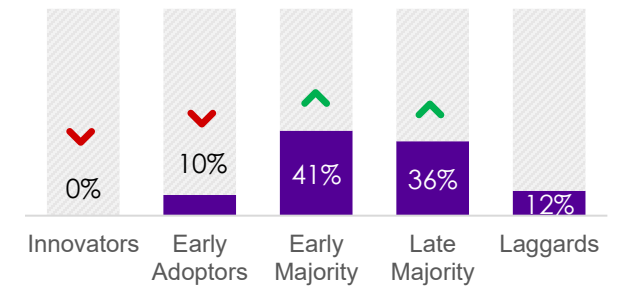


ALTRUIST IN FOCUS

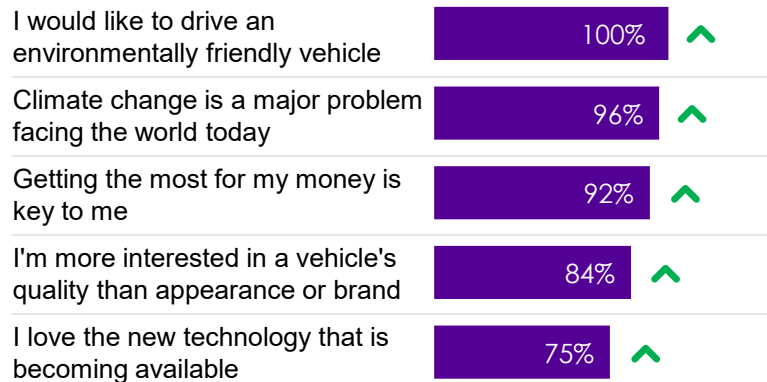
Altruists skew older, female, and liberal, with longer purchase timelines. Despite higher-than-average household income, they are value-driven, early-to-late majority buyers who prioritize purchase price, climate impact, practical technology, and quality over brand image. Hybrids are their preferred low-risk entry into electrification. BEVs are near the top of their consideration due to environmental benefits and operating cost savings, but persistent barriers temper full commitment. Use long-term value coupled with convenience and environmental benefits to draw in this audience.



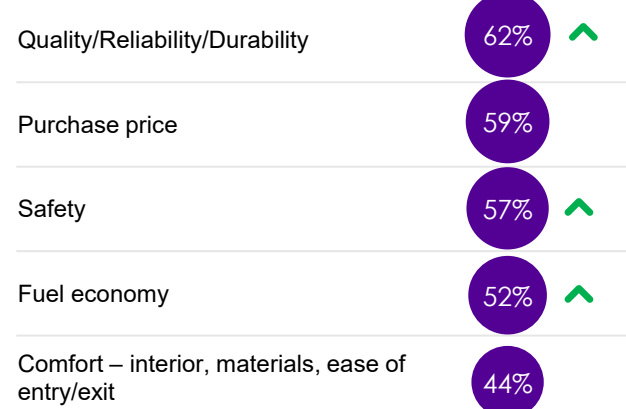
INNOVATION GROUP



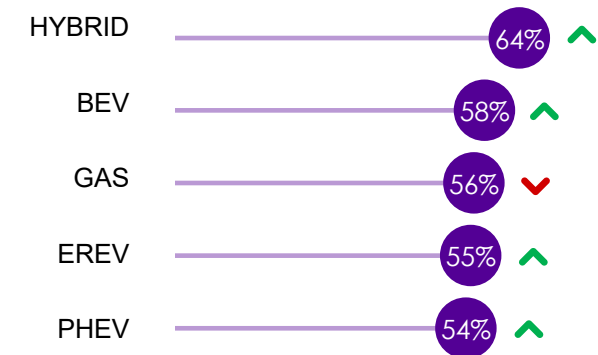
VEHICLE VALUES



MOST IMPORTANT VEHICLE ATTRIBUTES



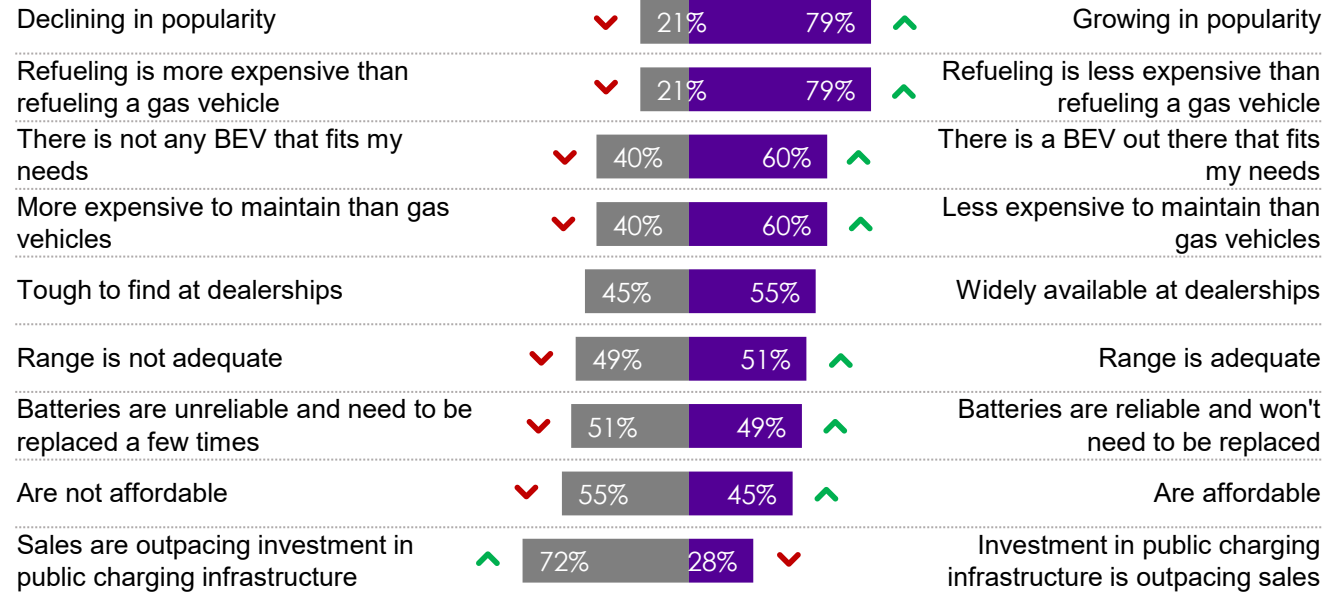
POWERTRAIN CONSIDERATION



EV BUYER PERSONA: Altruist



BEV STATEMENTS



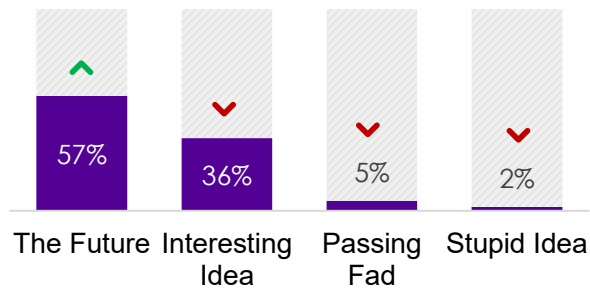
58% know someone who owns a BEV

39% require ≤350-mile range to seriously consider a BEV

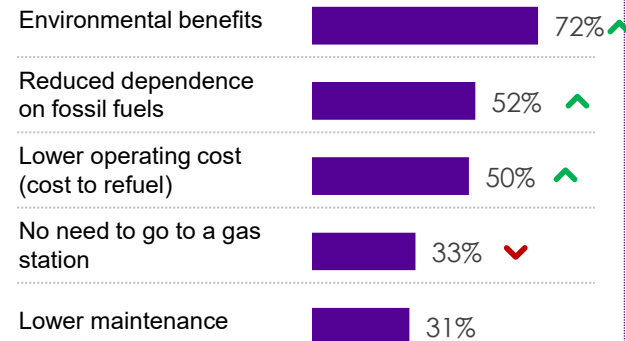
35% expect to spend ≥\$50,000 on their next vehicle

72% see chargers or signage

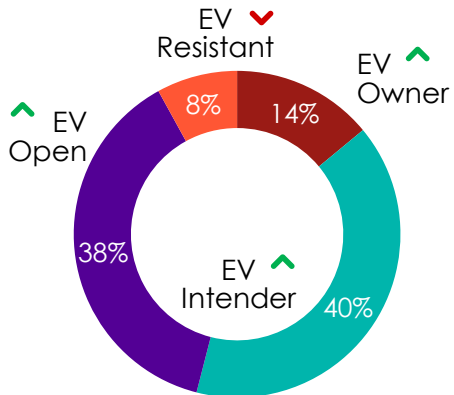
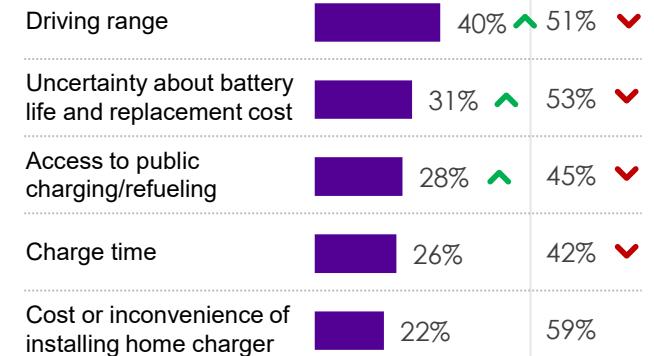
BEV PERCEPTIONS



TOP BEV BENEFITS



TOP BEV BARRIERS & STRENGTH OF BARRIER



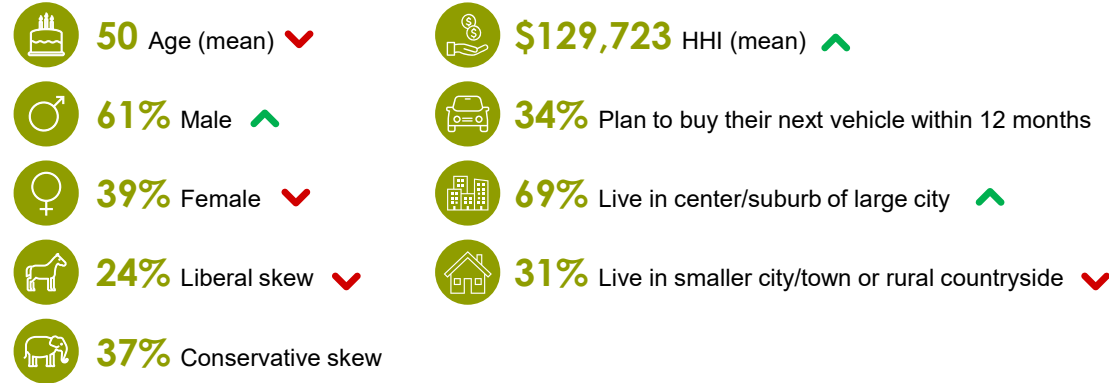
EV BUYER PERSONA: Techie

16% of sample

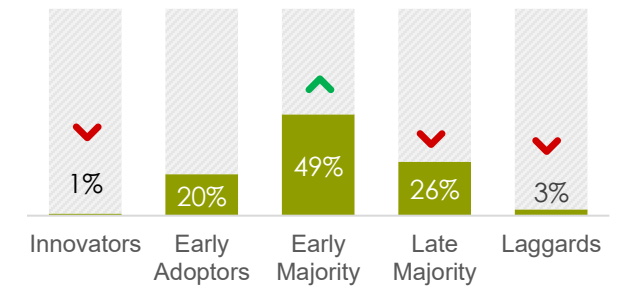


TECHIE IN FOCUS

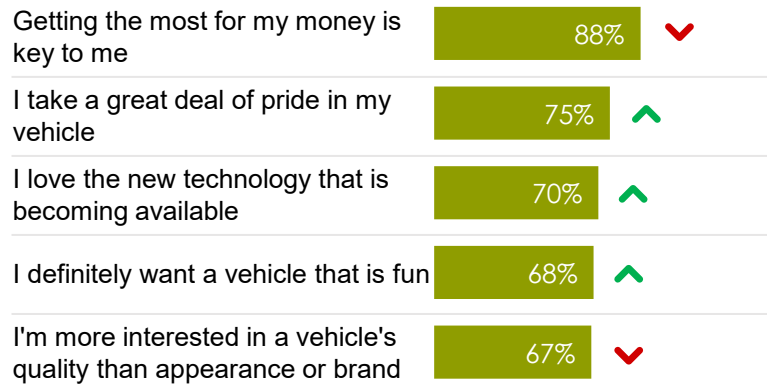
Techies skew younger and male, with higher household incomes and expected spend on their next vehicle. They are tech-forward, in the early majority, and care about style over traditional vehicle attributes. While they will consider gas or hybrid, they are open to plug-in powertrains and view BEVs as the future or an interesting idea. Technology and the convenience of avoiding routine gas station visits are key draws to a BEV, but capabilities fall short, with many needing more range than current BEVs offer.



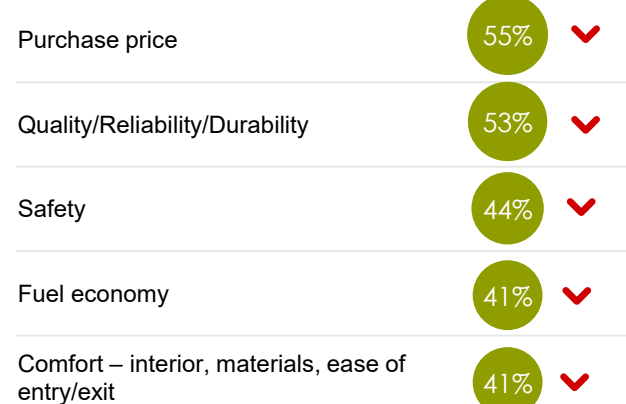
INNOVATION GROUP



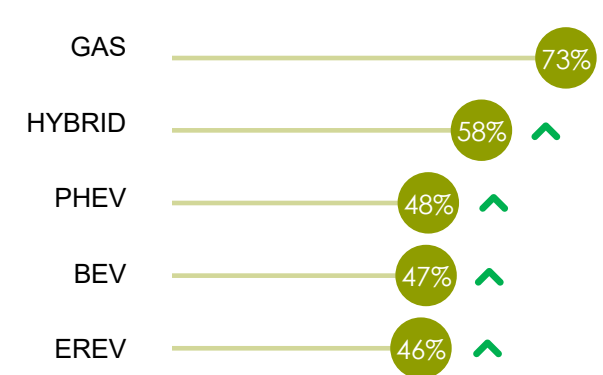
VEHICLE VALUES



MOST IMPORTANT VEHICLE ATTRIBUTES



POWERTRAIN CONSIDERATION



EV BUYER PERSONA: Techie



BEV STATEMENTS

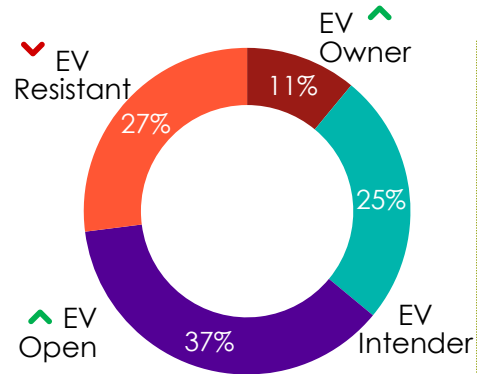
Refueling is more expensive than refueling a gas vehicle	33%	67%	Refueling is less expensive than refueling a gas vehicle
Declining in popularity	37%	63%	Growing in popularity
Tough to find at dealerships	41%	59%	Widely available at dealerships
More expensive to maintain than gas vehicles	53%	47%	Less expensive to maintain than gas vehicles
There is not any BEV that fits my needs	55%	45%	There is a BEV out there that fits my needs
Range is not adequate	59%	41%	Range is adequate
Are not affordable	59%	41%	Are affordable
Batteries are unreliable and need to be replaced a few times	60%	40%	Batteries are reliable and won't need to be replaced
Sales are outpacing investment in public charging infrastructure	62%	38%	Investment in public charging infrastructure is outpacing sales

58% know someone who owns a BEV

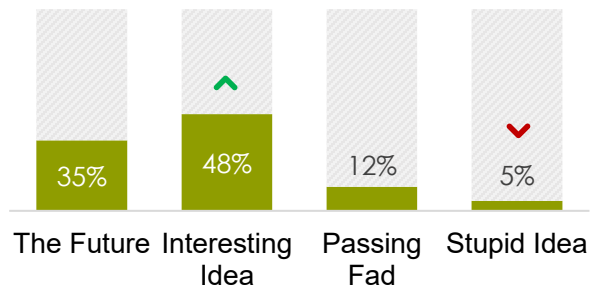
31% require ≤350-mile range to seriously consider a BEV

44% expect to spend ≥\$50,000 on their next vehicle

67% see chargers or signage



BEV PERCEPTIONS



TOP BEV BENEFITS

Innovative technology	49%
No need to go to a gas station	45%
Lower operating cost (cost to refuel)	41%
Lower maintenance	29%
Reduced dependence on fossil fuels	23%

TOP BEV BARRIERS & STRENGTH OF BARRIER

Driving range	35%	59%
Charge time	27%	47%
Uncertainty about battery life and replacement cost	25%	56%
Inconvenience of recharging battery	21%	57%
Access to public charging/refueling	20%	57%

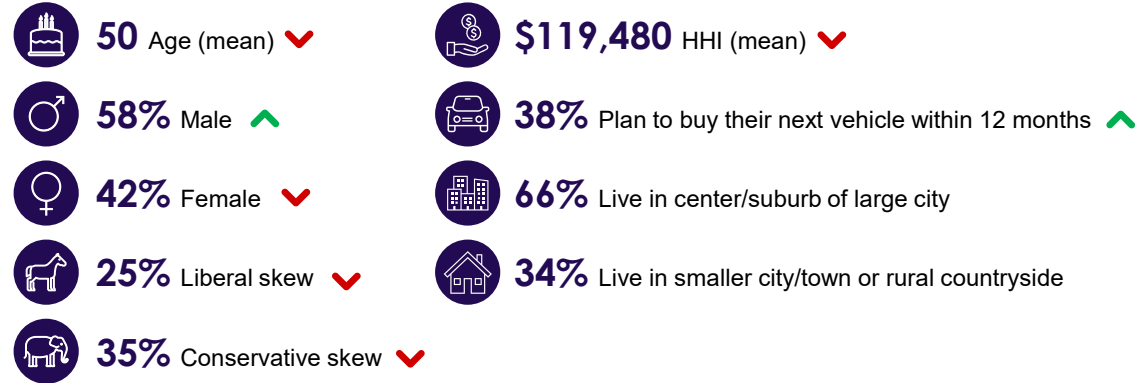
EV BUYER PERSONA: Dreamer

26% of sample

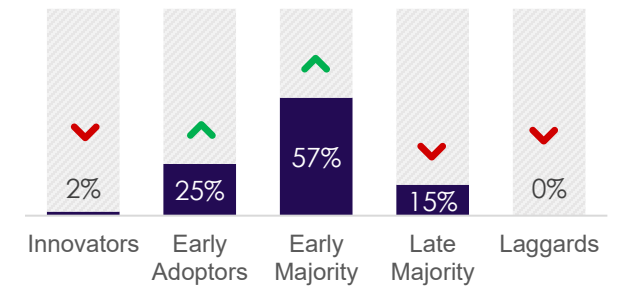


DREAMER IN FOCUS

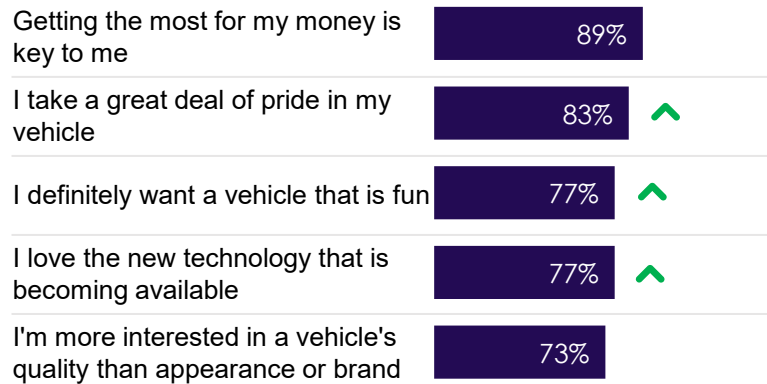
Dreamers skew younger and male, with lower incomes and below-average expected spend. As early majority buyers, they want a vehicle that stands out but are constrained by price. They typically consider gas or hybrid but are open to plug-ins. BEV is seen as an interesting idea or the future. Their appeal for the powertrain is in long-term savings through lower operating and maintenance costs, making value-focused messaging critical to overcoming upfront price concerns.



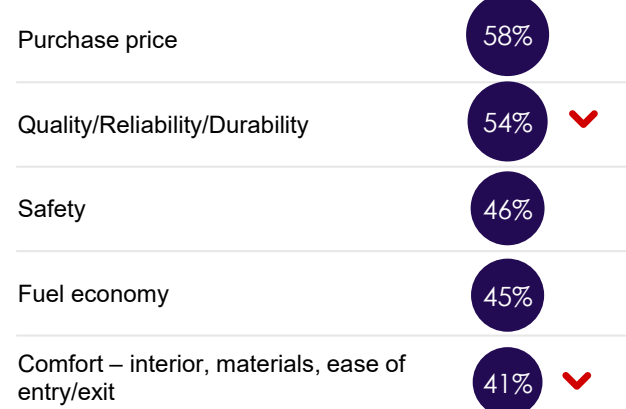
INNOVATION GROUP



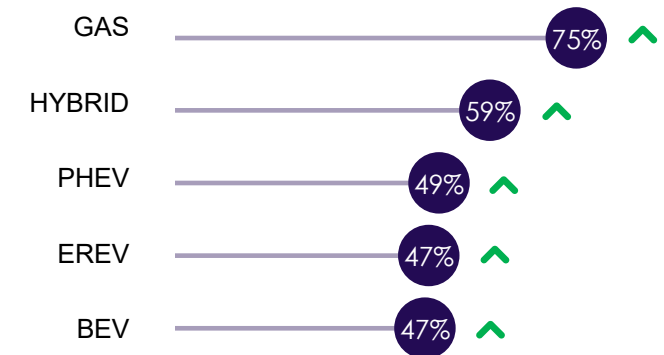
VEHICLE VALUES



MOST IMPORTANT VEHICLE ATTRIBUTES



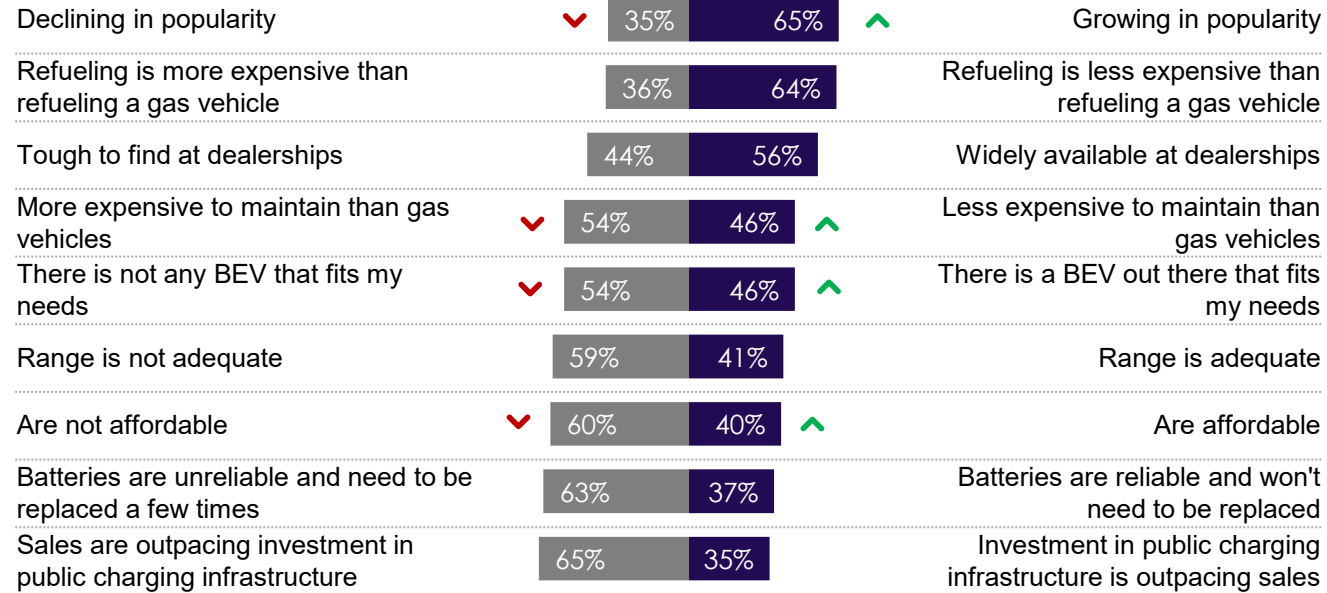
POWERTRAIN CONSIDERATION



EV BUYER PERSONA: Dreamer



BEV STATEMENTS

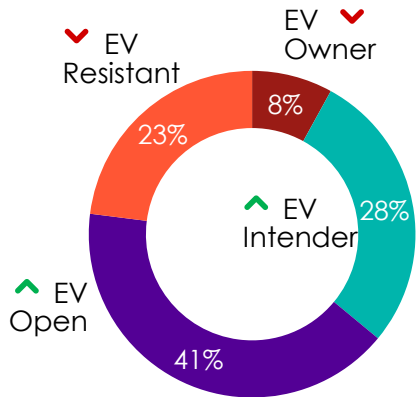


58% know someone who owns a BEV

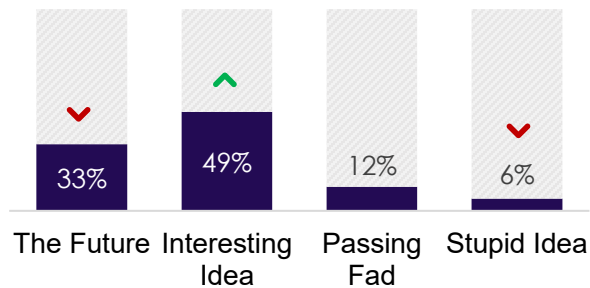
29% require ≤350-mile range to seriously consider a BEV

45% expect to spend ≥\$50,000 on their next vehicle

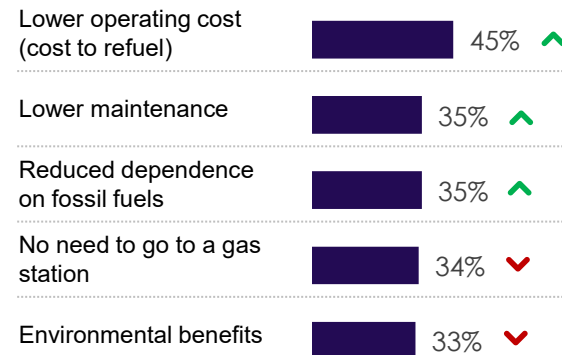
70% see chargers or signage



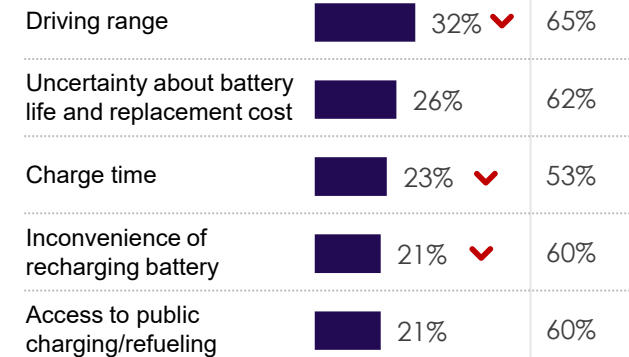
BEV PERCEPTIONS



TOP BEV BENEFITS

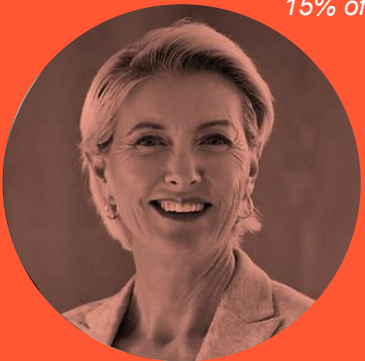


TOP BEV BARRIERS & STRENGTH OF BARRIER



EV BUYER PERSONA: Pragmatist

15% of sample



PRAGMATIST IN FOCUS

Pragmatists skew older, female and liberal, with lower income and longer purchase horizon. Positioned at the tail end of the adoption curve, they care about the environment but are strongly value-driven and view vehicles as basic transportation. Gas is their top choice; alternative powertrains fall lower in consideration, especially plug-ins. They see BEVs as an interesting idea and recognize environmental, cost, and convenience benefits, but persistent barriers keep them from deeper consideration for powertrain.

59 Age (mean)

\$111,853 HHI (mean)

45% Male

19% Plan to buy their next vehicle within 12 months

55% Female

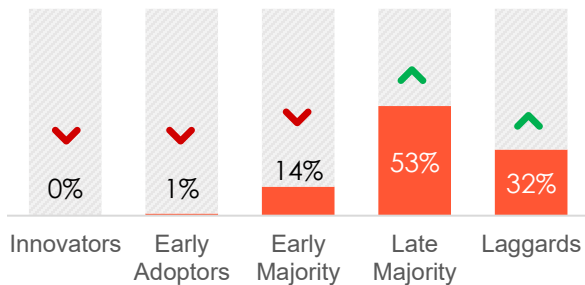
59% Live in center/suburb of large city

32% Liberal skew

41% Live in smaller city/town or rural countryside

30% Conservative skew

INNOVATION GROUP



VEHICLE VALUES

Getting the most for my money is key to me **90%**

I'm more interested in a vehicle's quality than appearance or brand **81%**

Climate change is a major problem facing the world today **74%**

I would like to drive an environmentally friendly vehicle **63%**

My vehicle is just a means of transportation, nothing more **57%**

MOST IMPORTANT VEHICLE ATTRIBUTES

Purchase price **74%**

Quality/Reliability/Durability **60%**

Fuel economy **58%**

Safety **54%**

Comfort – interior, materials, ease of entry/exit **43%**

POWERTRAIN CONSIDERATION

GAS **76%**

HYBRID **52%**

PHEV **36%**

EREV **33%**

BEV **32%**

EV BUYER PERSONA: Pragmatist



BEV STATEMENTS

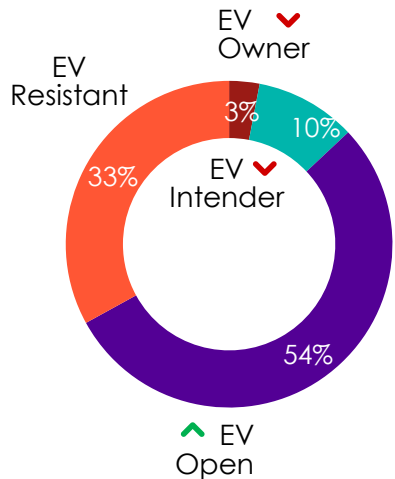
Refueling is more expensive than refueling a gas vehicle	39%	61%	Refueling is less expensive than refueling a gas vehicle
Declining in popularity	42%	58%	Growing in popularity
Tough to find at dealerships	55%	45%	Widely available at dealerships
More expensive to maintain than gas vehicles	64%	36%	Less expensive to maintain than gas vehicles
Sales are outpacing investment in public charging infrastructure	68%	32%	Investment in public charging infrastructure is outpacing sales
There is not any BEV that fits my needs	72%	28%	There is a BEV out there that fits my needs
Range is not adequate	73%	27%	Range is adequate
Batteries are unreliable and need to be replaced a few times	76%	24%	Batteries are reliable and won't need to be replaced
Are not affordable	78%	22%	Are affordable

39% know someone who owns a BEV

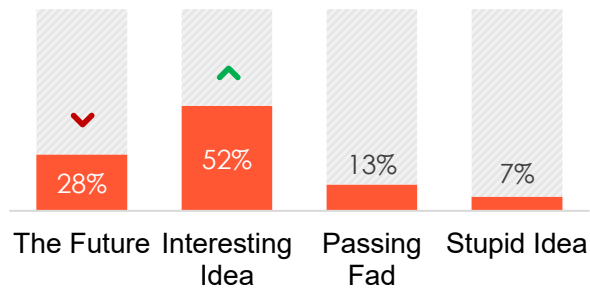
56% see chargers or signage

20% require ≤350-mile range to seriously consider a BEV

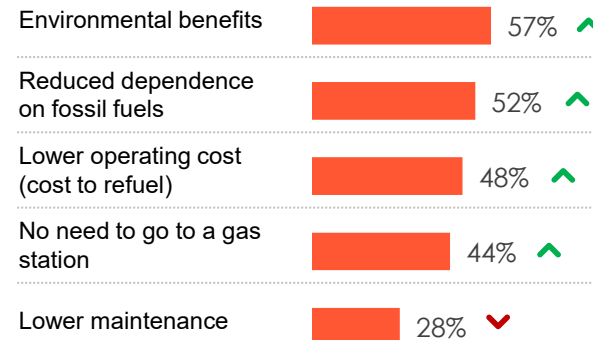
23% expect to spend ≥\$50,000 on their next vehicle



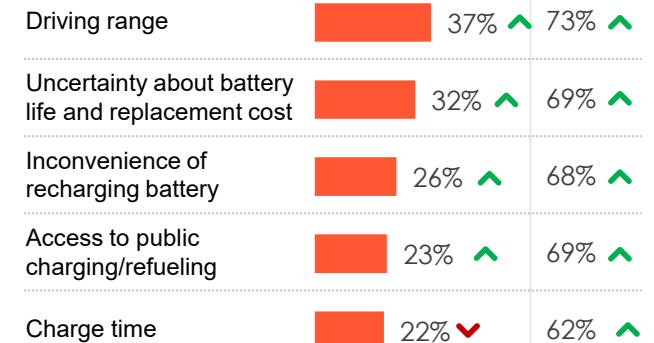
BEV PERCEPTIONS



TOP BEV BENEFITS



TOP BEV BARRIERS & STRENGTH OF BARRIER



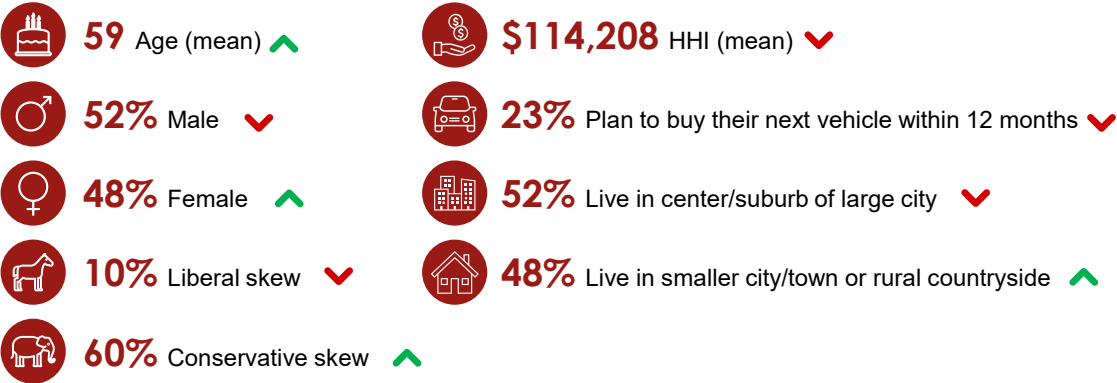
EV BUYER PERSONA: Traditionalist

20% of sample

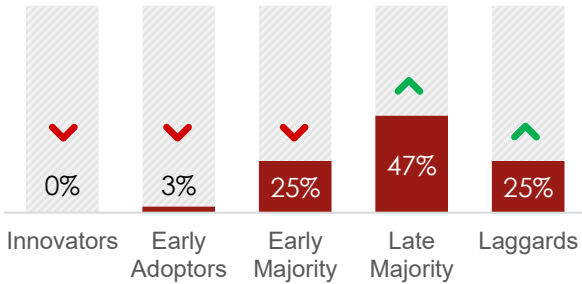


TRADITIONALIST IN FOCUS

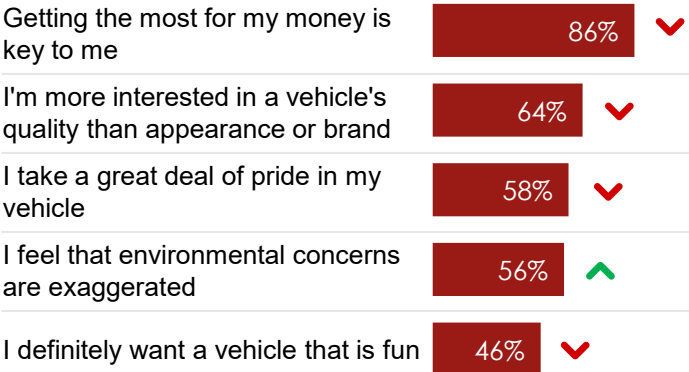
Traditionalist skew older and conservative. They have lower incomes, longer purchase horizons and live in more rural areas. They view environmental concerns as exaggerated and prioritize purchase price above all else. Gas vehicles make the most sense to them. They are skeptical about EVs, more often viewing them as a passing fad or stupid idea. While they acknowledge benefits like quiet operation and avoiding routine gas stations visits, those positives are far outweighed by barriers that strongly deter consideration.



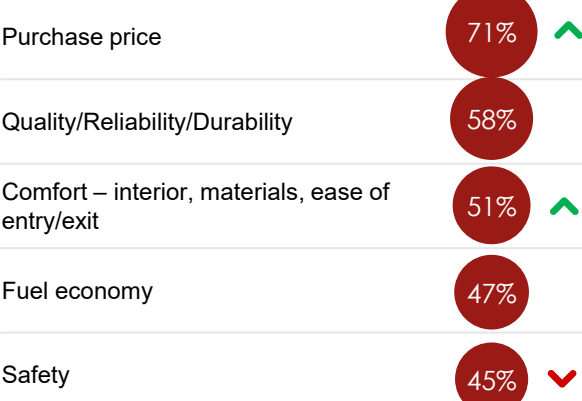
INNOVATION GROUP



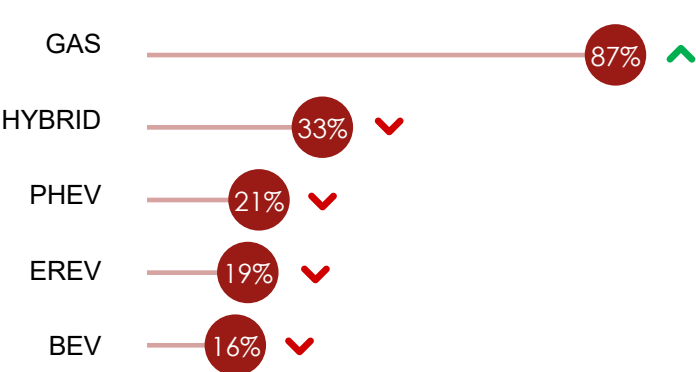
VEHICLE VALUES



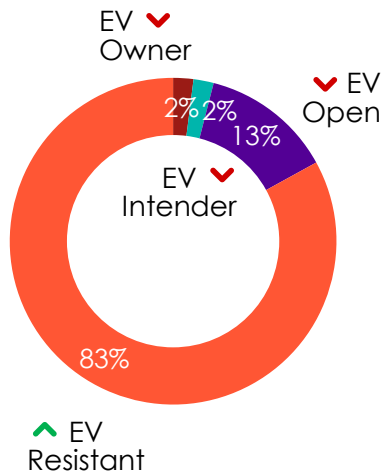
MOST IMPORTANT VEHICLE ATTRIBUTES



POWERTRAIN CONSIDERATION



EV BUYER PERSONA: Traditionalist



BEV STATEMENTS

Tough to find at dealerships	51%	49%	Widely available at dealerships
Refueling is more expensive than refueling a gas vehicle	55%	45%	Refueling is less expensive than refueling a gas vehicle
Sales are outpacing investment in public charging infrastructure	67%	33%	Investment in public charging infrastructure is outpacing sales
Declining in popularity	68%	32%	Growing in popularity
More expensive to maintain than gas vehicles	76%	24%	Less expensive to maintain than gas vehicles
Range is not adequate	84%	16%	Range is adequate
Are not affordable	85%	15%	Are affordable
There is not any BEV that fits my needs	86%	14%	There is a BEV out there that fits my needs
Batteries are unreliable and need to be replaced a few times	87%	13%	Batteries are reliable and won't need to be replaced

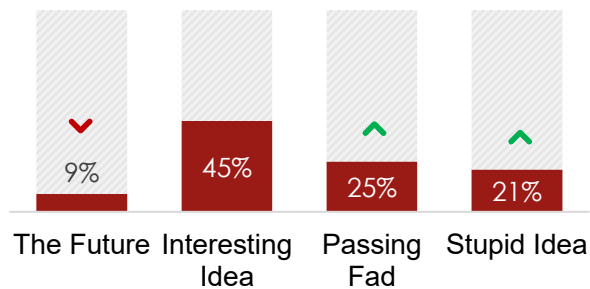
47% see chargers or signage

29% know someone who owns a BEV

10% require ≤350-mile range to seriously consider a BEV

32% expect to spend ≥\$50,000 on their next vehicle

BEV PERCEPTIONS



TOP BEV BENEFITS

Quietness	52%
No need to go to a gas station	43%
Lower operating cost (cost to refuel)	39%
Lower maintenance	29%
Innovative technology	21%

TOP BEV BARRIERS & STRENGTH OF BARRIER

Driving range	34%	83%
Uncertainty about battery life and replacement cost	30%	79%
Inconvenience of recharging battery	27%	81%
Charge time	24%	82%
Cost or inconvenience of installing home charger	21%	74%

EVForward U.S. – Offerings



EVForward Core Study

- Annual study for unparalleled insight into electric vehicle buyers (respondents are recruited monthly)
- Key topics: powertrain preferences, desired vehicle types/attributes, EV sentiment, EV barriers/benefits, charging access/usage, brand ratings, and much more
- Study elements: Market Profile; Buyer Segmentation; EV Intention Scoring



Data Portal & mTab Access

- Sample: 10,000 new-car buyers per year (**2020:** 10,293, **2021:** 10,218, **2022:** 10,272, **2023:** 10,418, **2024:** 11,000, **2025:** 10,026)
- mTab data portal for instant responses to EV queries
- mTab database includes Core Study data with detail by vehicle ownership, intended segment, brand opinion, EV Intention level, EV buyer type, age, location, and more
 - Visualization dashboards, data analysis tools, and data export capabilities available depending on mTab license (mTab Analyze)
- Monthly market and brand KPIs in Enlyta



DeepDives (4)

- Four studies are fielded and delivered at intervals over the course of the subscription year
- 2026 topics include: Affordability, Brand, Second BEVs, Segmentation x Powertrain
- Results for each DeepDive may be presented to clients with DeepDive access, by request



Custom Research

- Volume pricing for recontact studies fielded through EVForward panel
- Subscribers can leverage EVForward algorithms for recruiting, database profiling and special analyses, subject to setup fee
- Ongoing analysis support and survey design assistance



Insights on Demand

- Offering cost effective and sophisticated real-time market feedback from our representative sample of US new-vehicle buyers to answer client's specific business questions on the next generation of EV shoppers and owners
- Clients can ask up to 10 proprietary questions per month, reaching approximately 670 new car buyers



EVForward Pulse Newsletter

- EVForward's monthly e-newsletter, delivering specific, timely insights about the next generation of EV buyers
- Each month, we survey the next generation of EV buyers on timely topics based on market news, trends and disruptors. Examples include brand consideration, consumer education, marketing tactics, new vehicles releases and more



Other Markets

- EVForward offers a separate research program for the European market (Germany, France, Italy, Spain and the United Kingdom) that is entering its sixth year of study (**2021:** 9,252, **2022:** 9,396, **2023:** 10,182, **2024:** 10,141, **2025:** 8,460)
- EVForward launched for the first time in Southeast Asia (Indonesia, Malaysia, Philippines, Thailand, Vietnam) (**2024:** 7,936)
- EVForward has the structure in place to launch in Mexico (n=1,500), Canada (n=1,500), Nordic (n=1,500/market) and China (n=1,900), pending client interest

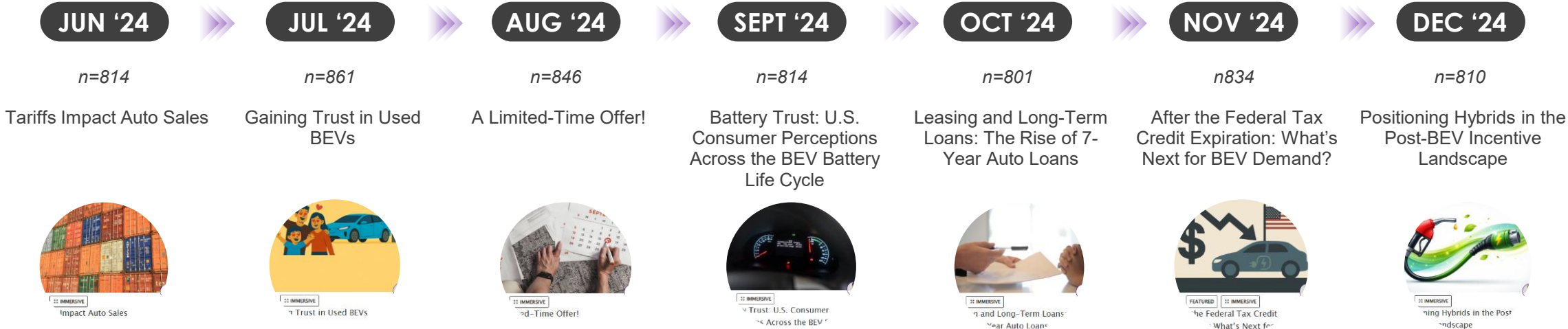
EVForward Pulse Monthly

The EVForward Monthly Pulse Allows For Real Time Findings And Analysis

Each month, EVForward recruits n=~670 new car buyers, providing clients a real-time look into the minds of U.S. consumers.

In 2025, Escalent published 12 monthly newsletters leveraging the data compiled throughout this report.

Each month, the team explored a new topic, focusing on areas like BEV adoption patterns, sales volume changes, the impact of tariffs on consumer automotive demand, the dissolution of the federal EV tax credit, 7-year auto loans, hybrid and PHEV strategies, etc. Each newsletter is available in [Enlyta](#) for EVForward subscribers.



Escalent Brand Audiences

Each [EVForward Brand Audience](#) Below Can Be Activated On LiveRamp, The Trade Desk, Google Ads, And More!

Five EVForward Audiences— And More To Come!

It's the psyche of the EV buyer that's most important: each EV audience has behaviors, values, life situations and more that's critical to determining their propensity to buy an EV.

Escalent has created 5 unique, proprietary audiences based on our 6+ years of speaking to and analyzing the habits, behaviors and opinions of new car buyers.

In 2025, Escalent uploaded nearly a dozen more unique audiences to various advertising marketplaces.

EV Buyer Persona Audiences



Steward



Young Enthusiast



Torchbearer

EV Intention Audiences



EV Intender



EV Open

Further customization and creation of new audiences available by request.

Please reach out to [Ben Lundin](#) for more information

EVForward Team

Talk To The Experts



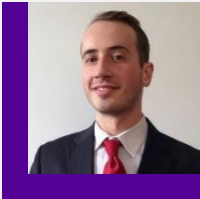
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About Escalent

Escalent is a top human behavior and analytics firm specializing in industries facing disruption and business transformation. As catalysts of progress for more than 40 years, we tell stories that transform data and insight into a profound understanding of what drives human beings. And we help businesses turn those drivers into actions that build brands, enhance customer experiences and inspire product innovation. Visit escalent.co to see how we are helping shape the brands that are reshaping the world.

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