

# The Buyer Journey

Client: California Energy Commission  
2016

In 2016, Frontier Energy conducted a year-long research project for the California Energy Commission to understand the point in the buyer journey at which information about electric vehicles could most influence a car shopper's vehicle choice. The Frontier team conducted surveys, focus groups, interviews, and exhaustive literature review to understand the behavior of individual and fleet buyers.

Most respondents—fleet and individual buyers—began car shopping to replace a vehicle. Many fleet buyers follow planned replacement cycles, but individuals typically waited until their current vehicle became unreliable. Nearly all buyers started shopping with a vehicle type in mind, like an SUV, four-wheel drive, luxury, or fuel efficient.

They considered hybrid and EV a distinct type of vehicle. By the end of the buyer journey, a few of the prospective EV buyers bought a conventional vehicle, however, none of the respondents switched from a conventional vehicle to a ZEV.



## In partnership with State of California agencies and the automakers, FRONTIER ENERGY:

- Worked with the car-buying websites like KBB and Edmunds to include EVs in searches for terms like “fuel efficient” and “high mileage” instead of only appearing in searches for EVs
- Through the automakers’ regional sales offices, encouraged dealerships to display lease prices for EVs on websites so that prospective buyers could see that EVs were affordable
- Developed a cost calculator that included rebates, tax credits, fuel cost, insurance estimate, and maintenance to compare an EV with a conventional car
- Focused messaging on barriers that included:
  - Discomfort with leasing a car—many people in the study preferred to buy a car because of perceived value of a trade in, concern about exceeding the mileage restriction, and/or the perception that a car is an asset
  - Concern about the ability to add home charging—half the study group rented their residence and nearly half of the home owners lived in residences that were built before 1970 or did not have private parking