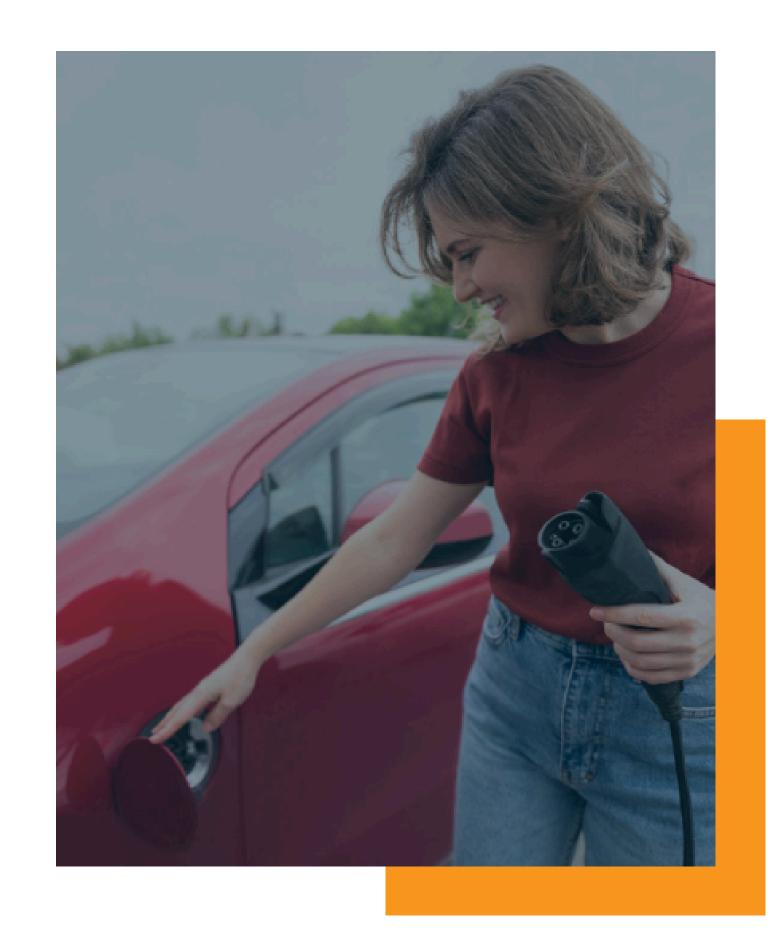


Methodology

Our 2025 EV driver survey was conducted from January 2025 to March 2025. This analysis shows the results for all EV drivers who reported living in the state of California, which encompasses 730 respondents. To see the demographics of the survey respondents, please click here.

The intent of this report is to show a full picture of the current EV experience in California, in particular:

- Purchasing considerations when buying an EV
- The likelihood of EV drivers' next vehicle being an EV
- The biggest concerns respondents had when buying or leasing an EV, and their biggest concerns now
- The charging experience
- The purchasing or leasing journey for an EV



EV Information

The Chevy Bolt is the top model among California respondents, while the Tesla Model 3 and Tesla Model Y are also popular.

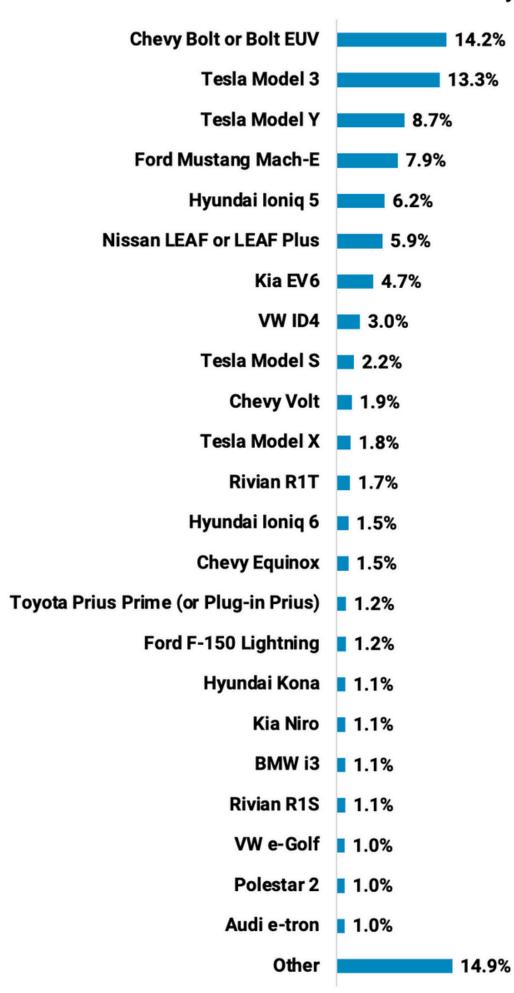
14.2% of California EV driver respondents said their primary EV is a Chevy Bolt. 13.3% said a Tesla Model 3 is their primary EV, while 8.7% said a Tesla Model Y is their primary EV. The Ford Mustang Mach-E and the Hyundai loniq 5 rounded out the top five.

83.1% of California EV driver respondents said they got their primary EV new, compared to 16.9% who said they got it used.

80.7% of California EV driver respondents said they bought their primary EV, while 19.3% said they leased it.



What is the model of your primary EV?



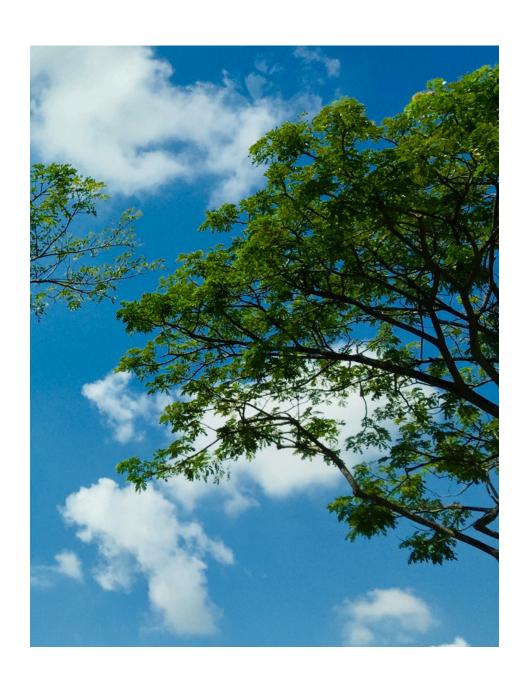
What influences EV purchases/leases in California?

"Clean air/environmental protection" is still the most important consideration for California EV driver respondents, with cost savings coming in second.

43.7% of California EV driver respondents said that clean air/environmental protection is their most important purchase consideration when choosing to buy an EV. This is slightly higher than the 39.7% of respondents nationwide who said the same.

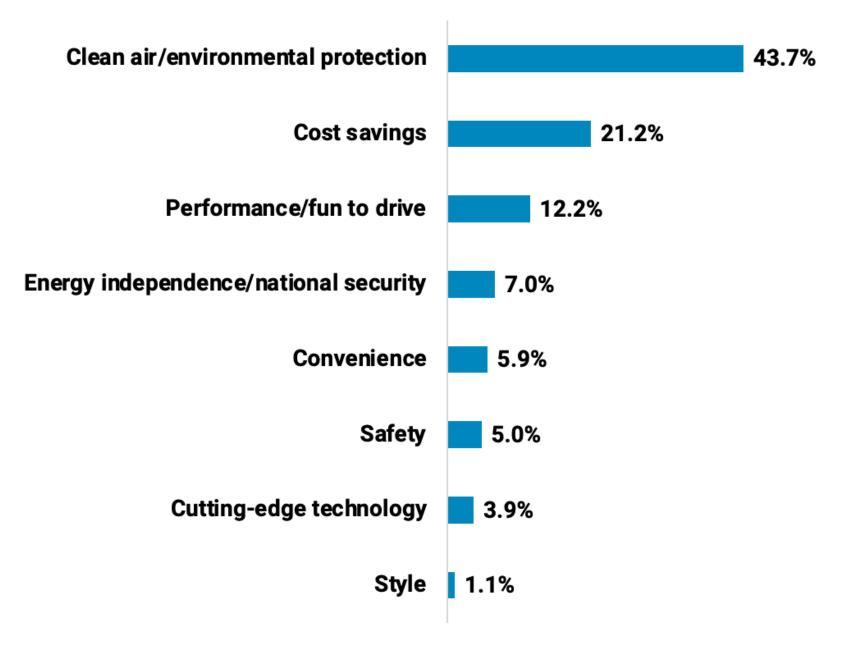
21.2% of California EV driver respondents said that cost savings is their most important consideration when choosing to buy an EV, in line with the 21.4% of nationwide respondents who said the same. While the other considerations are in line with the national average, clean air and cost savings represent the two differences in California.

We also asked respondents to reach each consideration individually based on how critical they are to them. While not selected often as the most important consideration, **61% of California EV driver respondents said safety is a crucial consideration** for them. It was the consideration that was second-most likely to be considered crucial by California respondents.



"Clean air/environmental protection" is still the most important consideration for California EV driver respondents, with cost savings coming in second.

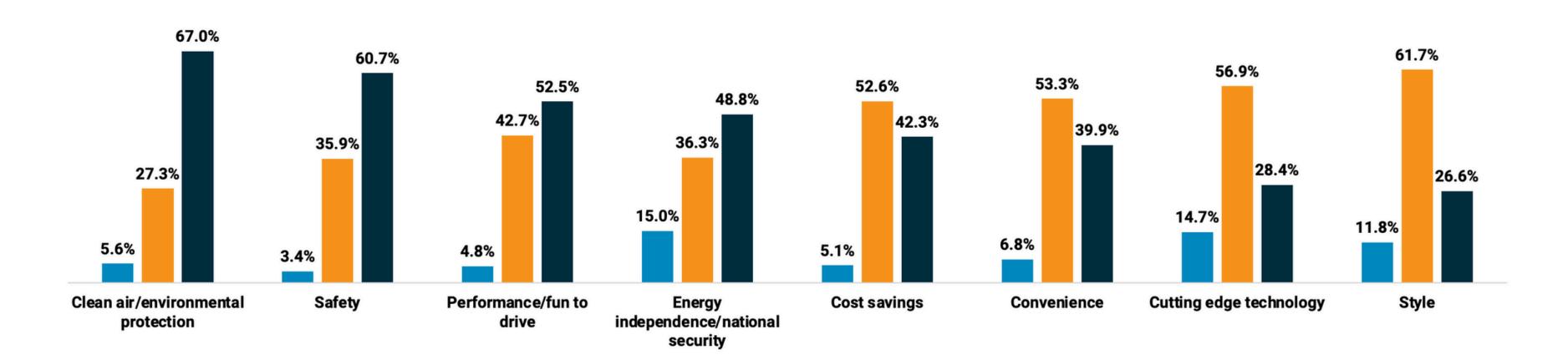




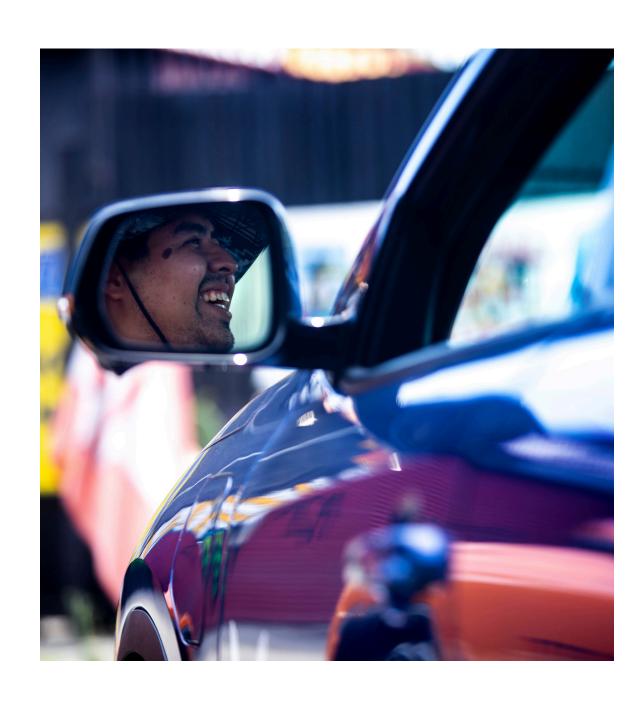
California respondents were most likely to cite "clean air/environmental protection" and "safety" as crucial purchase considerations.







California EV driver respondents saw concern drop in almost every single aspect after experience with an EV.



California EV driver respondents saw their concerns drop once they had experience with an EV. The biggest drops were seen in battery range, price, and access to home charging.

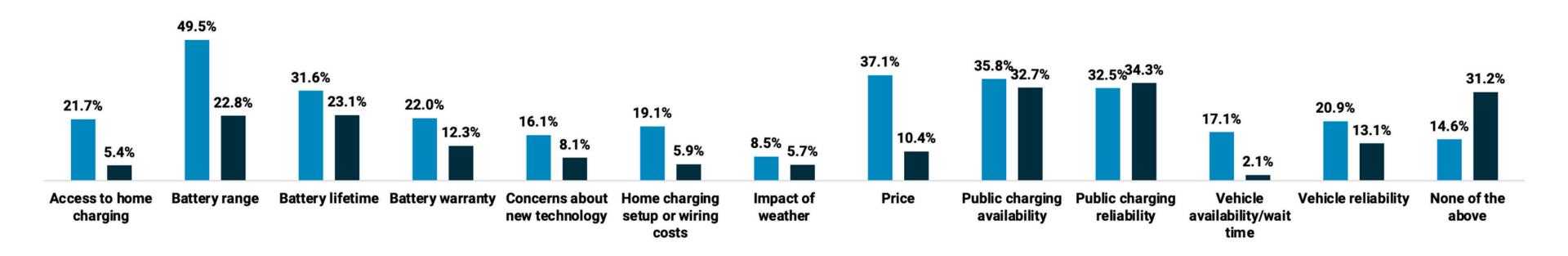
They actually saw a slight increase in concern when it comes to public charging reliability, but there was a slight decrease in concern when it comes to public charging availability.

After experience with an EV, 31.2% of California EV driver respondents said they had no concern with their EVs. Before experience with an EV, only 14.6% said the same.

California EV driver respondents saw concern drop in almost every single aspect after experience with an EV.

Which of the following were/are concerns for you...

■ at the time you bought or leased an EV ■ now that you own or lease an EV

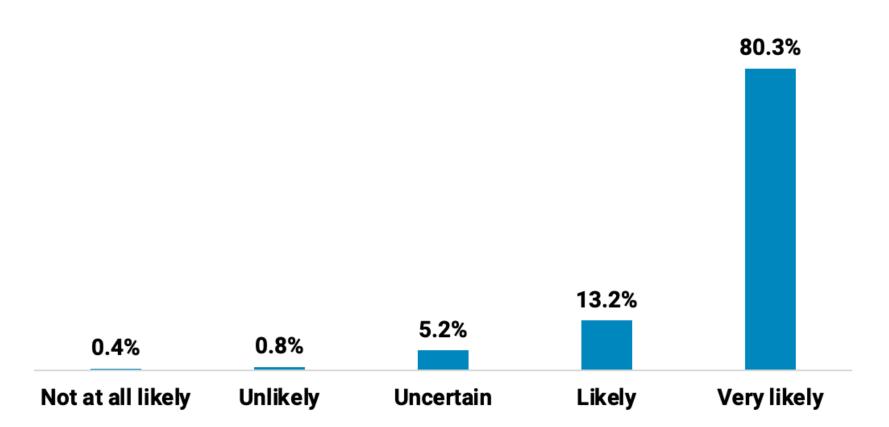


About 94% of California EV driver respondents said it is likely or very likely their next vehicle will be an EV.

93.5% of California EV driver respondents said it is likely or very likely their next vehicle will be an EV, with 80.3% saying it is very likely.

In last year's survey, about 89% of California EV driver respondents said the same. This was largely in line with the national total. This year, California drivers were slightly more likely to indicate likelihood.

What is the likelihood that your next vehicle will be an EV?



The federal EV tax credit is the most-used incentive in California, and state incentives are also popular.

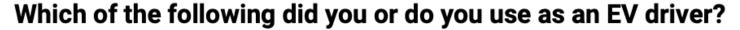
68% of California EV driver respondents said they used the federal EV tax credit, while 67% said they use or have used inexpensive home charging.

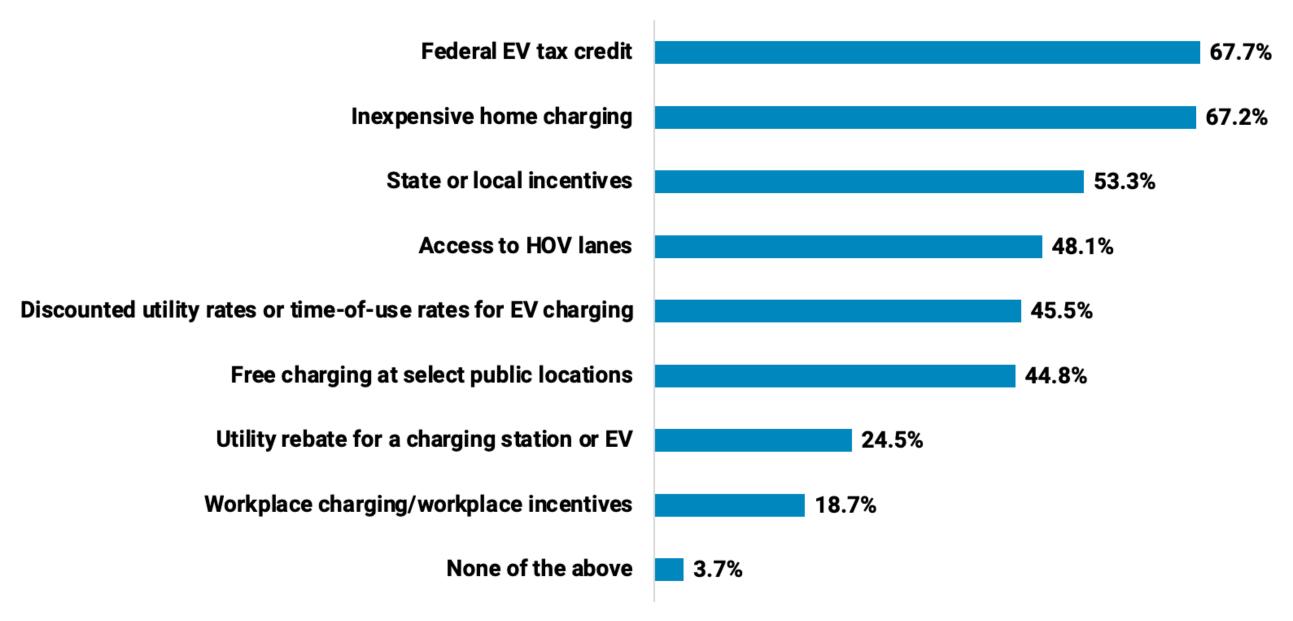
53% of California EV driver respondents reported using state or local incentives, much higher than the national percentage of 34%.

California EV driver respondents were more likely to report use of HOV lanes, discounted utility rates, and utility rebates for a charging station or EV than the national population.



The federal EV tax credit is the most-used incentive in California, and state incentives are also popular.





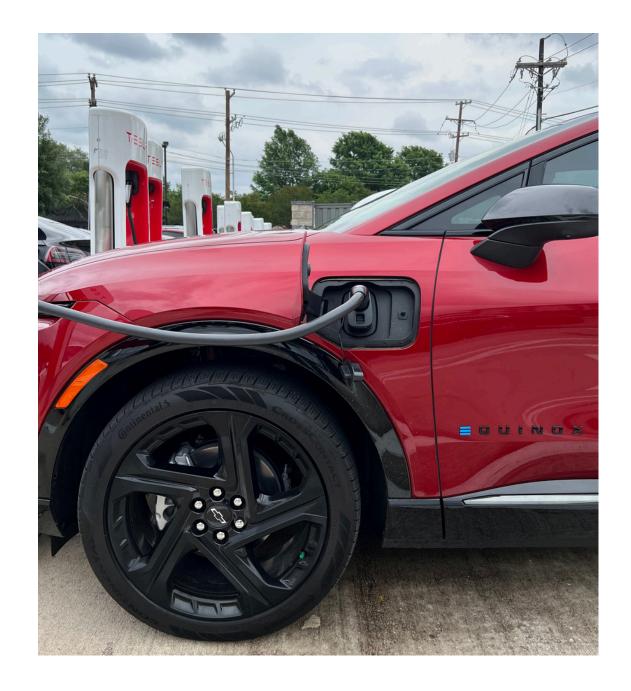
Charging in California

California EV drivers typically rely on home chargers but use home chargers on a less frequent basis than the country as a whole.

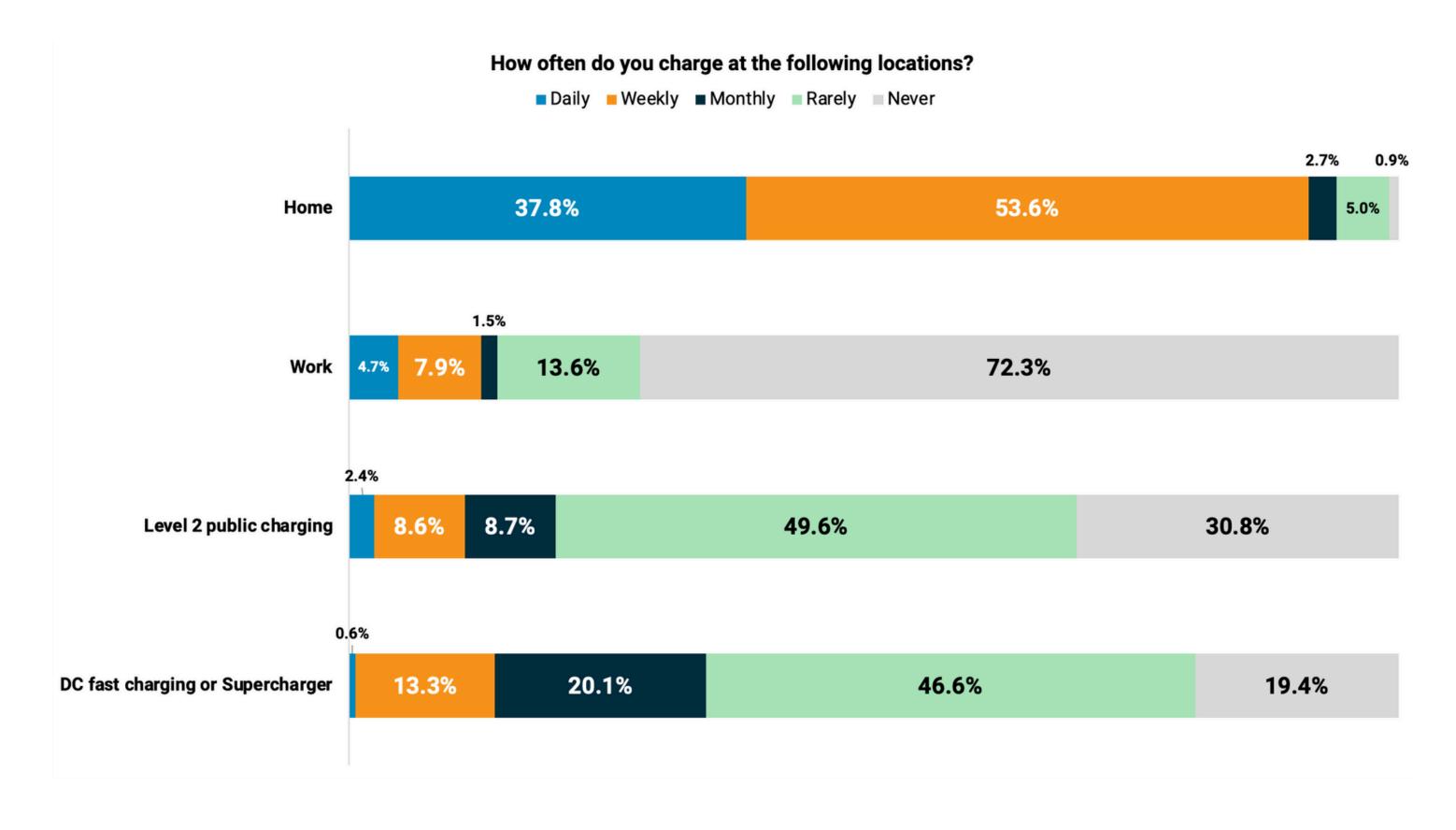
38% of California EV driver respondents said that they use a home charger daily, while 54% said they use a home charger weekly. In the country as a whole, 50% of EV driver respondents said they use home chargers daily and 45% said they use them weekly.

50% of California EV driver respondents said they use Level 2 chargers rarely, while 20% said they use them at least monthly.

47% said they use DC fast chargers or Superchargers rarely, while 34% said they use them at least monthly.



California EV drivers typically rely on home chargers but use home chargers on a less frequent basis than the country as a whole.



California EV drivers are more likely to report use of schedule charging features and more likely to be offered special rates for home EV charging.

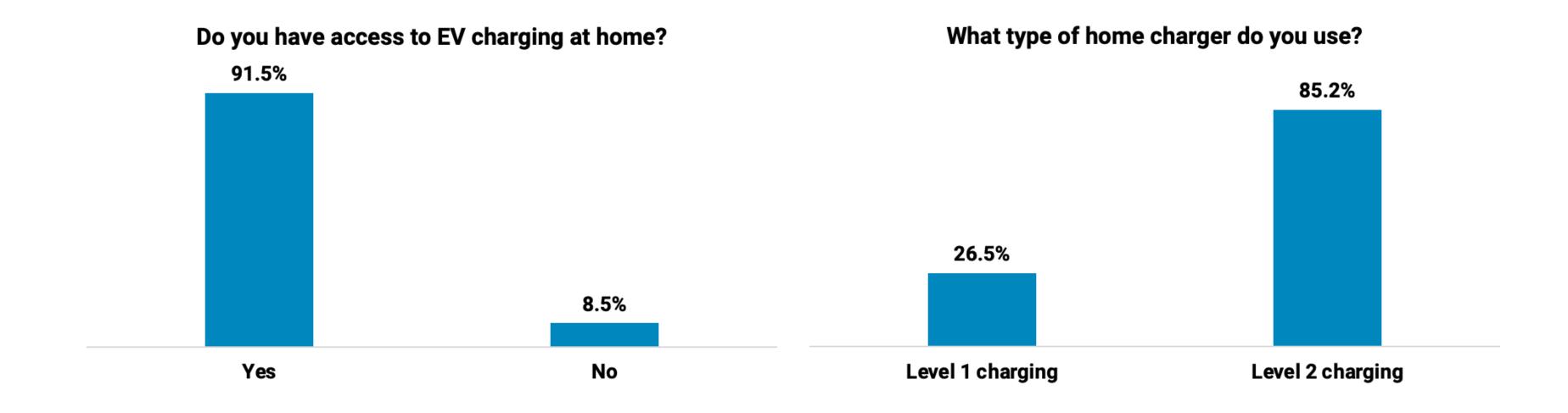
92% of California EV driver respondents said they have access to home EV charging. 85% have access to a Level 2 charger at home, while 27% have access to a Level 1 charger at home.

68% of California EV driver respondents said that they **use a schedule charging feature** to control the time of the day they charge. For comparison, 49% of EV driver respondents nationwide said they use a schedule charging feature.

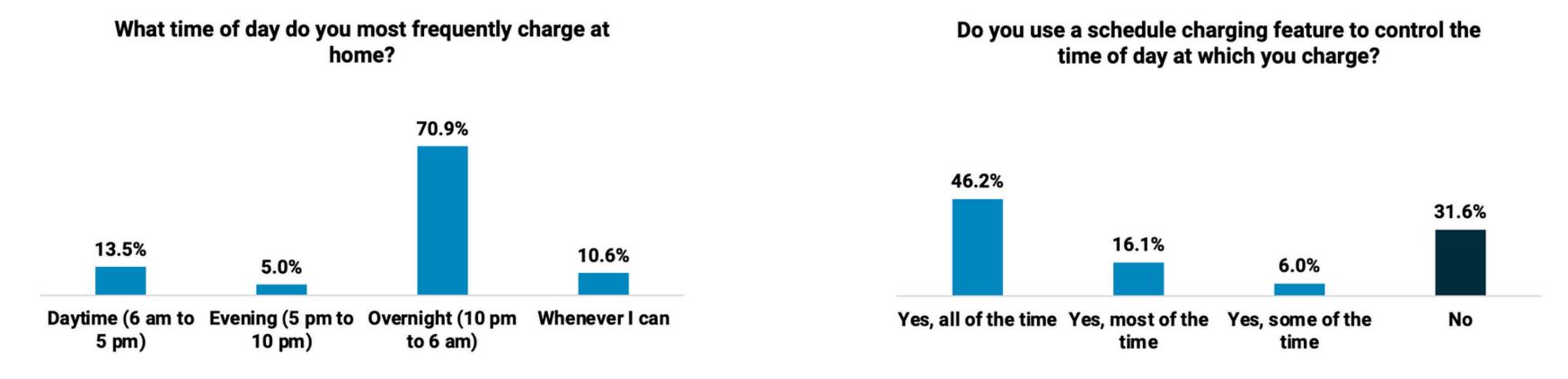
70% of California EV driver respondents **said their local electric utility offers special rates for home EV charging**, and **49**% **use the special rates**. For comparison, 39% of respondents nationwide said that their local electric utility offers discounted rates for home EV charging.

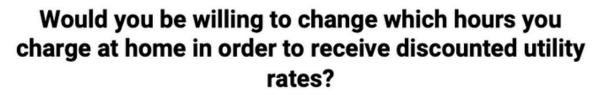


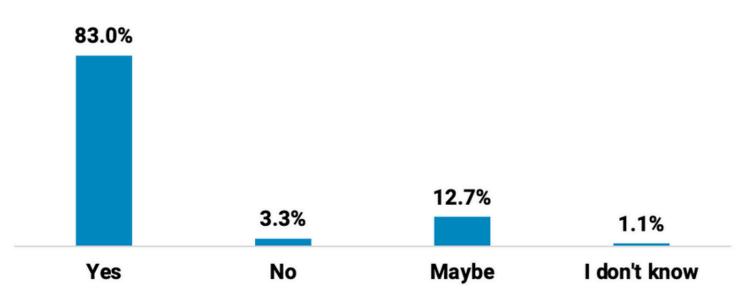
92% of California EV driver respondents have access to home EV charging, with 85% of those having access to a Level 2 charger.



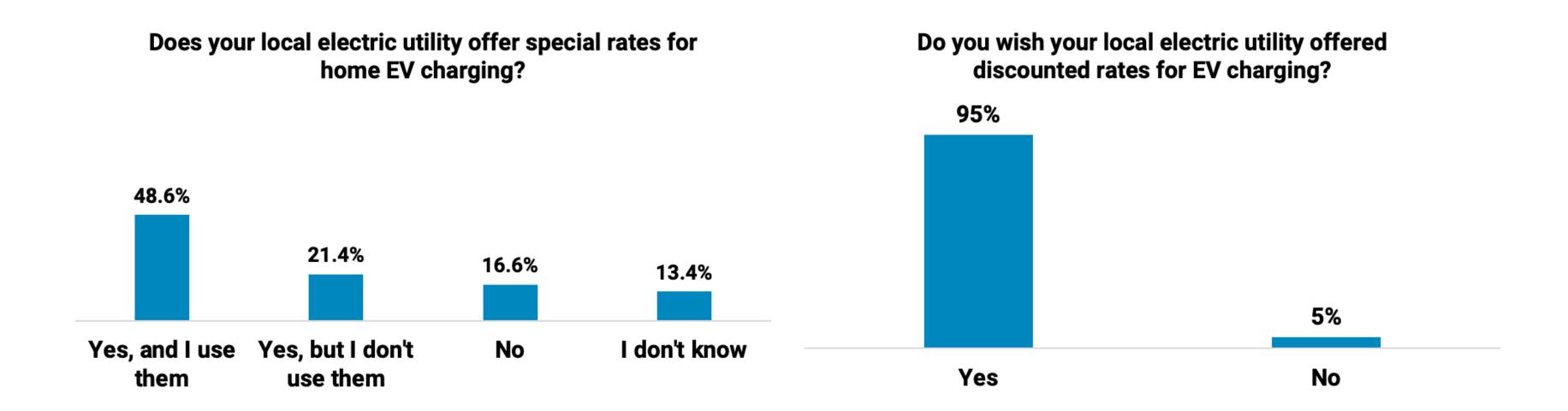
68% of California respondents use a schedule charging feature at home, almost 20% higher than the country.







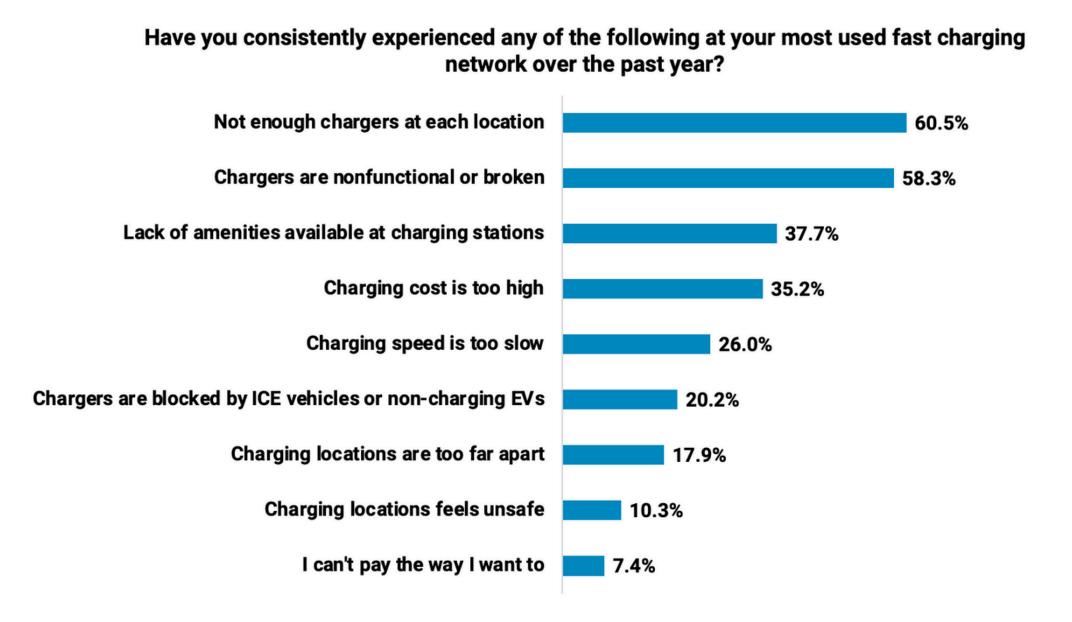
70% of California respondents said their local electric utility offers special rates for home EV charging, about 30% higher than the country.



California EV drivers identified need for more chargers at each fast charging location.

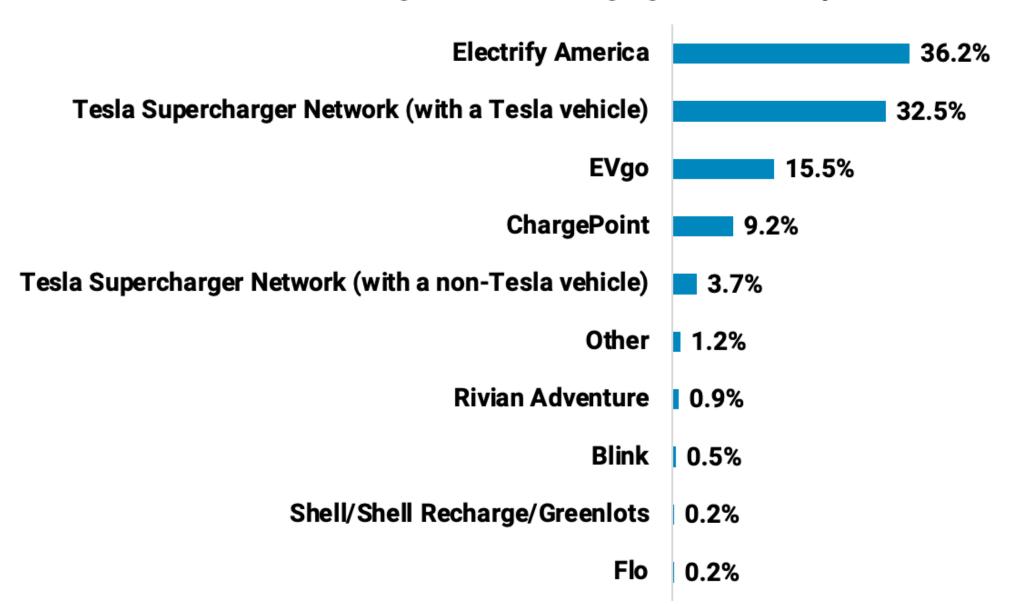
60.5% of California EV driver respondents said they have **consistently experienced not having enough chargers at each location** in the past year. Nationwide, less than half of respondents said the same.

Broken or nonfunctional chargers (58.3%) are the second biggest problem reported. This was consistent with the country as a whole, and with California respondents in last year's survey as well.



Electrify America and the Tesla Supercharger Network are the most popular fast charging networks for California respondents.

Which single DC fast charging network do you most often use?



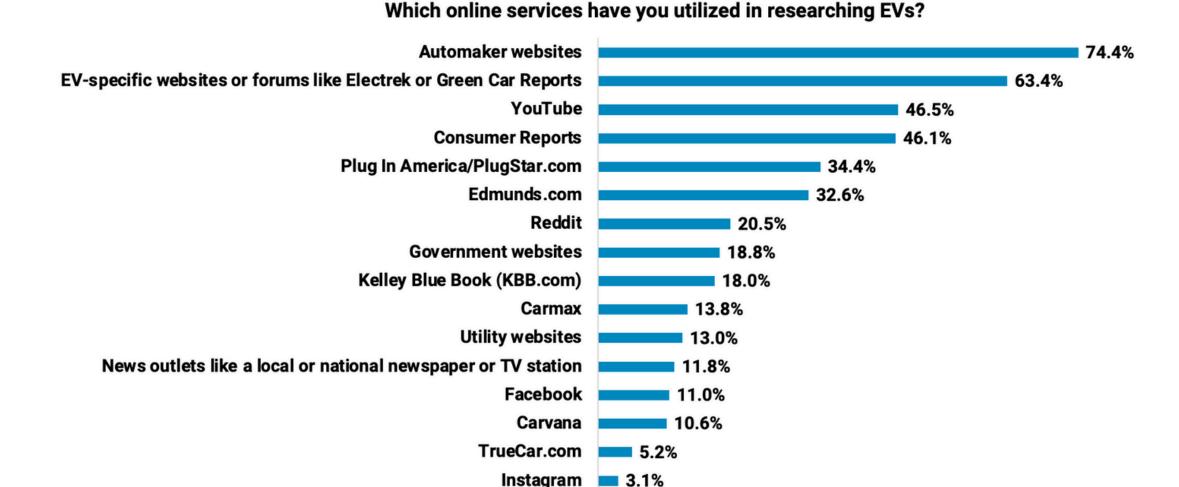
Buying or Leasing an EV in California

Automaker websites and EV-specific websites stand out as the most popular online services for EV research in California EV driver respondents.

74.4% of California EV driver respondents said they used automaker websites for EV research, while 63.4% said the same about EV-specific websites or forums.

46.5% of California EV driver respondents said that they used YouTube for EV research, while 46.1% said they used Consumer Reports.

California largely aligns with the rest of the country in the online services they use.



X/Twitter 2.5%

Threads 1 0.7%

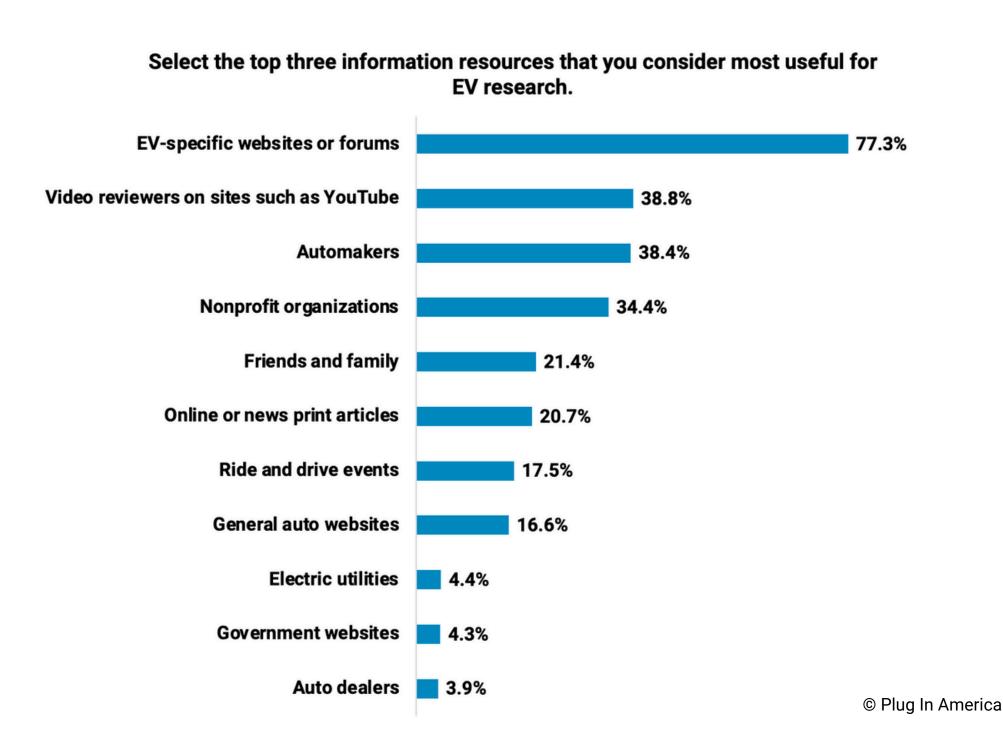
Bluesky 2.5%

EV-specific websites are far and away considered the most useful resource for EV research in California, while YouTube and automakers round out the top three.

77.3% of California EV driver respondents said they consider EV-specific websites one of the most useful resources for EV research, almost twice as likely to be selected as any other option.

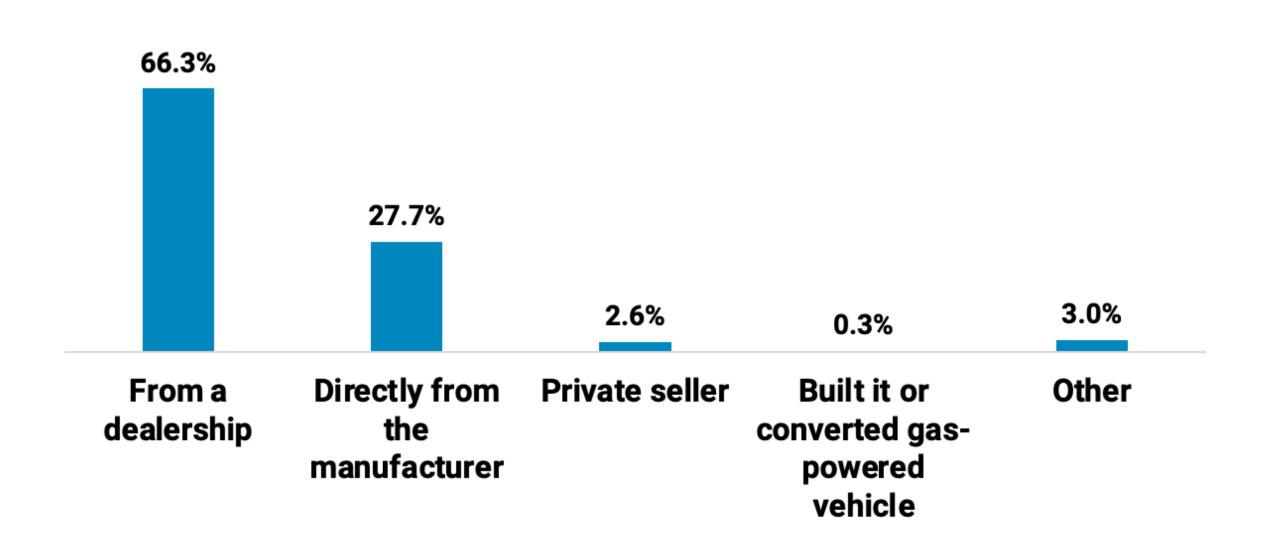
YouTube (38.8%), automakers (38.4%) and nonprofit organizations (34.4%) are also considered useful for EV driver respondents in California.

Electric utilities (4.4%), government websites (4.3%) and auto dealers (3.9%) were the least likely to be selected among California EV driver respondents.



Two-thirds of California EV driver respondents got their primary EV from a dealership.





Dealership EV knowledge is higher in California than in the country. However, California dealers have little influence on decisions.

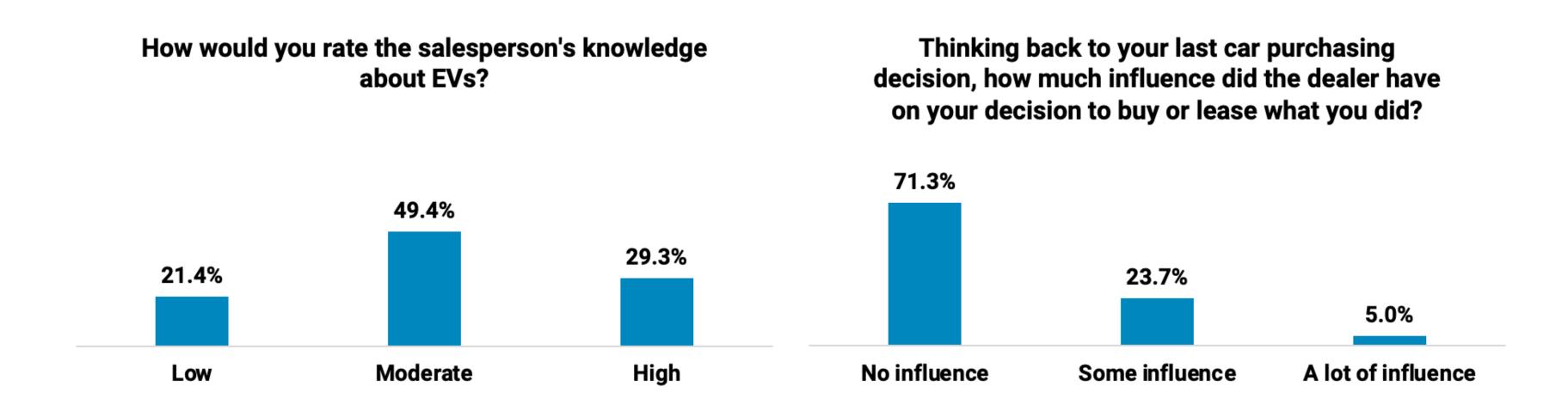
29% of California EV driver respondents said that their dealer had high knowledge of EVs when they got their primary EV, compared to 21.4% who said the knowledge was low. In the country as a whole, 29.1% said their dealer had low knowledge and 22.7% said their dealer had high knowledge.

Despite higher knowledge, respondents indicated that dealers don't have much influence on their decision-making. **71**% said that their dealer had no influence on their decision to buy or lease what they did.

86.3% of California EV driver respondents said that they know exactly what they want to buy or lease when they go to a dealer, making it important to reach consumers before they get to the dealership in the first place.



Dealership EV knowledge is higher in California than in the country. However, California dealers have little influence on decisions.



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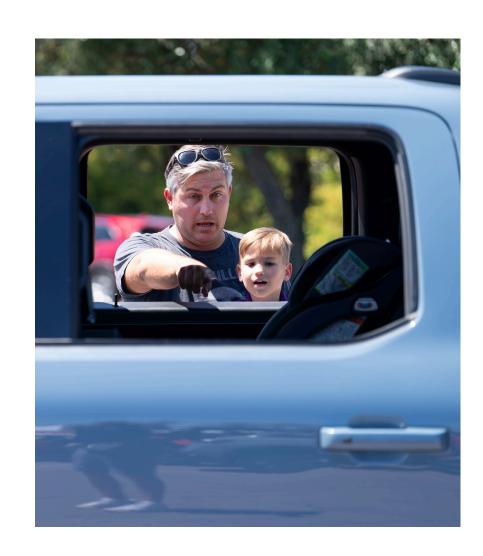


California EV driver respondents are generally satisfied with the EV purchasing process, especially in finding information and in taking delivery of the vehicle.

83% of California EV driver respondents said they were satisfied with finding the information needed to buy or lease an EV when it came to their primary EV. **81**% said they were satisfied with taking delivery of the vehicle.

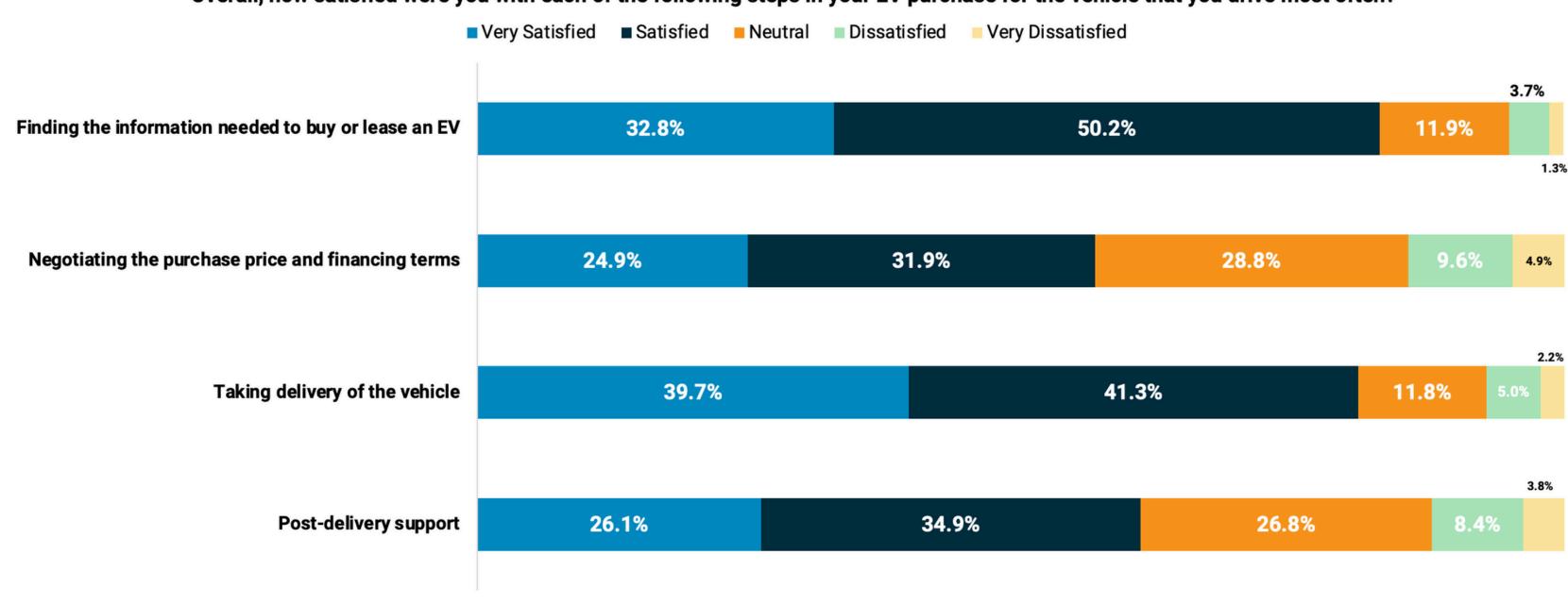
The results for post-delivery support (61% of respondents said they were satisfied or very satisfied with this step) and negotiating the purchasing price (56%) were still positive but less overwhelming than with the two other steps mentioned.

These results were largely consistent with the country as a whole.



California EV driver respondents are generally satisfied with the EV purchasing process, especially in finding information and in taking delivery of the vehicle.





Demographics

Demographics

Age Range	Percentage
18-24	0.3%
25-34	4.7%
35-44	9.5%
45-54	13.1%
55-64	24%
65-74	31.7%
75+	16.6%

Race/Ethnicity	Percentage
Asian/Asian American or Pacific Islander	12.8%
Black or African American	2.7%
Hispanic or Latino	7.6%
Native American or Alaska Native	1.7%
White	83.5%
Other	3%

Gender Identity	Percentage
Male	79.8%
Female	18.5%
Nonbinary	0%

Some respondents either declined to specify or answered that they would prefer to self-describe.

Some respondents declined to specify.

Demographics

Annual Household Income	Percentage
Up to \$36,000	2.7%
\$36,001 to \$50,000	4.7%
\$50,001 to \$75,000	7.4%
\$75,001 to \$100,000	16.4%
\$100,001 to \$250,000	47.7%
Over \$250,000	21.1%

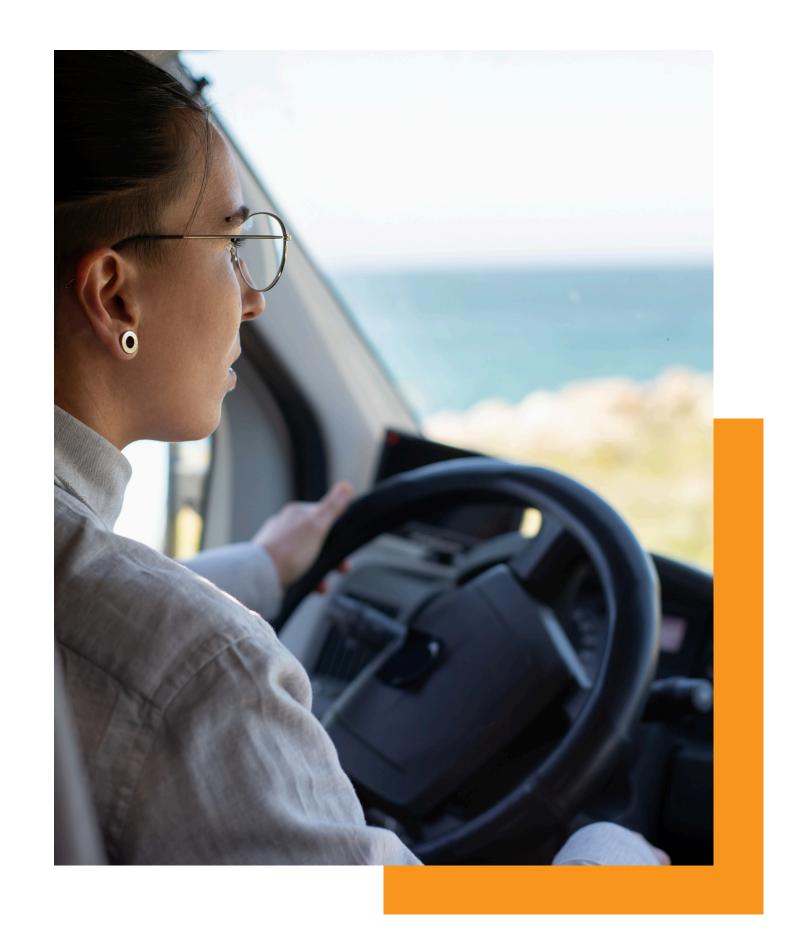
Home Residence	Percentage
Single-family home	82.9%
Multi-family housing, such as an apartment, condo or townhome (2-5 units)	8.7%
Multi-family housing, such as an apartment, condo or townhome (6+ units)	7.9%
Other	0.6%

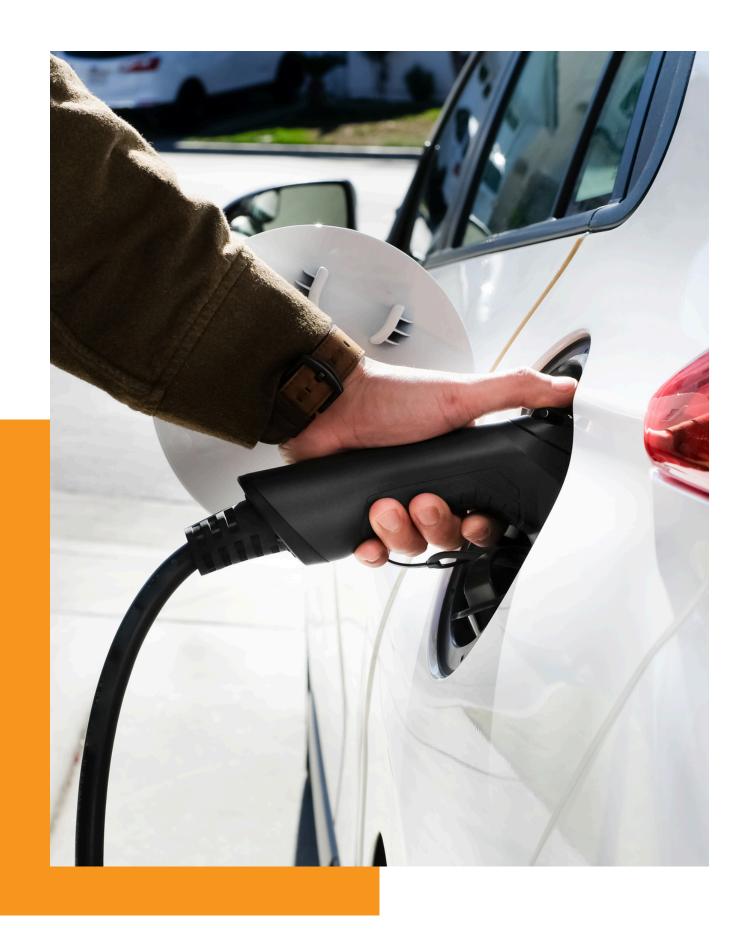
Is your home residence owned or rented?	Percentage
Owned	90.1%
Rented	9.9%

Takeaways

Messages to emphasize

- EV drivers enjoy everyday cost savings. Although the upfront cost of a new EV can be higher than a traditional gas car, everyday savings on fuel costs and maintenance, as well as rebates and incentive programs, can make up the difference in the long term and make EVs significantly cheaper over their lifetime, saving drivers thousands of dollars.
- Safety is an important EV purchase consideration. Consumers view safety as a crucial consideration in their decision to drive an EV, and EVs are sought after for their safety features.
- Government and utility incentives are available. State, local, and utility incentives are underutilized and not well-known. Policymakers and advocates can promote incentives and assist EV drivers with finding and applying for incentives.
- **EV drivers love their vehicles.** EV driver surveys consistently find that 9 out of 10 EV drivers expect their next car to be electric.
- To know an EV is to love one. Many people have concerns about switching to an EV, but once they drive an, EV nearly all of these concerns diminish.





Policies to prioritize

- **Electrify local fleets.** Increased visibility of EVs in local communities builds trust for potential EV drivers, since friends and family are often trusted sources of information.
- Expand charging infrastructure, especially public charging. Level 2 public charging is especially needed within walking distance of multifamily housing in order to alleviate concerns about battery range and charging options. Cities can also streamline the permitting process for public charging installation. States and municipalities can adopt right-to-charge policies, which expand access to charging at condominiums, apartments, and homeowners associations.
- Incentivize EV driving and reduce unnecessary road user fees. EV
 drivers are happy to pay their fair share to support roads and bridges,
 but excessive charging and annual EV registration fees are often
 punitive and hit low-income communities hardest. EV drivers already
 contribute to transportation funding through state taxes and fees.
 Investment in public charging can bring revenue to local communities
 and businesses, and the benefits that EVs bring should be rewarded
 with incentives, rebates, and assistance programs.

Efforts to prioritize

- Educate, educate, educate. Educational programs make a difference. These can be in-person, standalone ride-and-drive events or events associated with a national campaign like National Drive Electric Month or Drive Electric Earth Month. First-hand experience counters harmful myths and misconceptions about EVs.
- **Provide a place for people to ask questions one-on-one.** This happens organically at ride-and-drive events but also can take the form of live chat, email, or phone support like Plug In America's EV Support Center.
- Share EV driver stories through digital campaigns to show how today's EVs can fit into a variety of lifestyles and meet different needs. Stories that highlight cost savings, incentives, and drivers' love for their vehicles are impactful.
- Provide resources in places like EV-specific websites, such as PlugStar.com, and on social media websites like YouTube and Reddit. These platforms are critical for education and consumer research.
- Educate retailer and dealer staff who interface with the public about EVs.

 Programs like Plug In America's PlugStar offer retailer and dealer training in various formats and ongoing support to improve the consumer experience.





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