

# MODULO WATT SURVEY



Electric vehicles: interest & expectations  
of visitors to the 2010 Motor Show



Speeding up the uptake and wider use of electric vehicles

# SURVEY ARCHITECTURE

## THE SURVEY IS BASED ON:

- An approach to new engines
- Getting out & about and car use
- Focus on the electric vehicle
- Personal data

## OPERATIONAL CONDITIONS OF THE SURVEY:

- Size of the sample: 536 people aged 18 and over
- Place: the Paris Motor Show - Porte de Versailles
- Period: From 01/10 to 10/10/2010
- Data gathering: face to face interviews (paper format and/or on iPad)
- Data processing: Google Docs

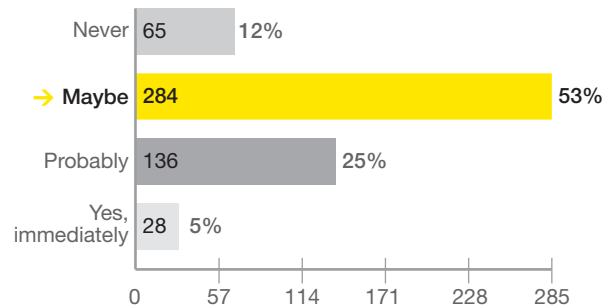


This survey was carried out in partnership with the daily newspaper **20 Minutes** during the Paris Motor Show



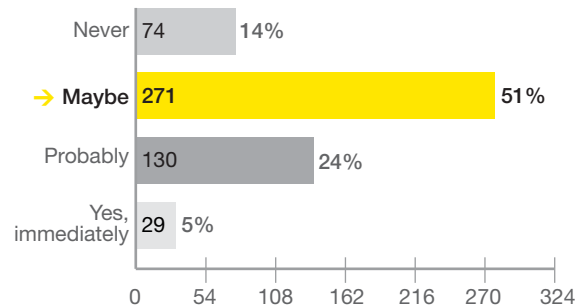
# APPROACH TO NEW ENGINES

Were you to buy a new car,  
would you choose?  
A classic Hybrid  
(petrol/electric such as a Toyota Prius)



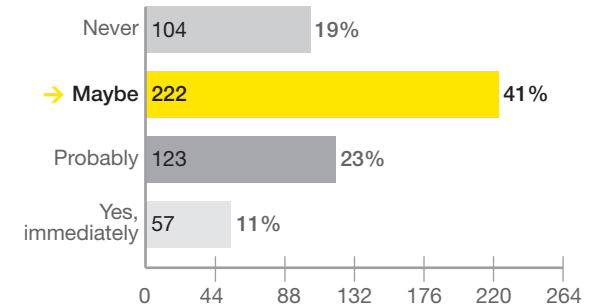
WE FIND THE NORMAL SPREAD BETWEEN «EARLY ADOPTERS» AND THE REST OF THE SAMPLE.

Were you to buy a new car,  
would you choose?  
A rechargeable Hybrid  
(such as a: Peugeot 3008, Chevrolet Volt, Fisker Karma,...)



WE CAN NOTE THAT 30% OF THE SAMPLE HAVE A FAVOURABLE OPINION OF HYBRID VEHICLES.

Were you to buy a new car,  
would you choose?  
A 100% electric Vehicle  
(such as a: Renault Zoe, PSA I-On, Citroën C-zero,...)

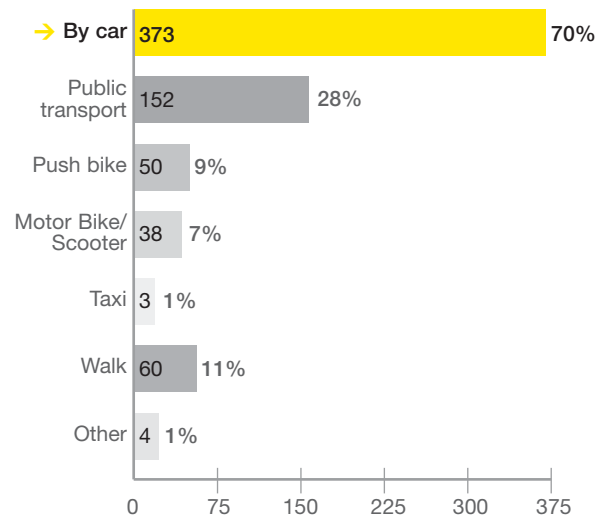


FOR THE 100% EV, OPINIONS ARE EVEN MORE CLEAR-CUT BETWEEN THE FORS AND THE AGAINSTS.

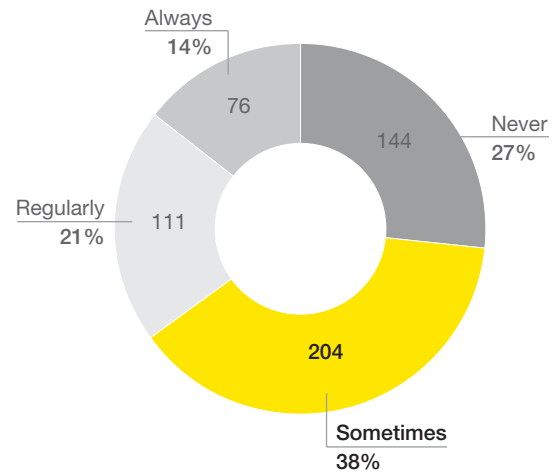


# GETTING OUT & ABOUT AND CAR USE

How do you get out and about on a daily basis?



Do you use public transport to get around in town on a daily basis?

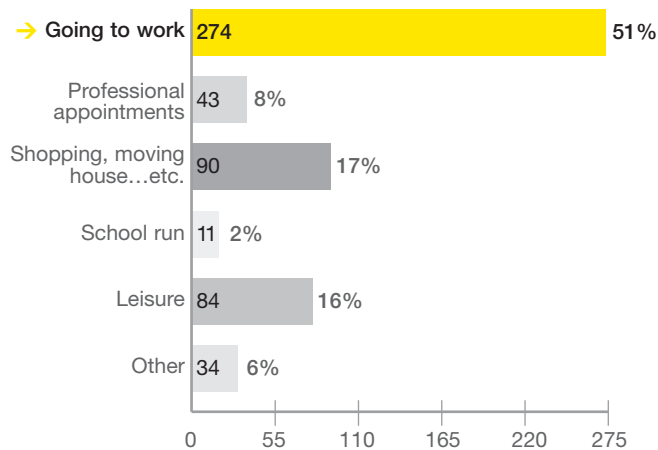


DESPITE GOVERNMENT INCENTIVES, MOST CITY TRAVELLING IS DONE IN CARS.

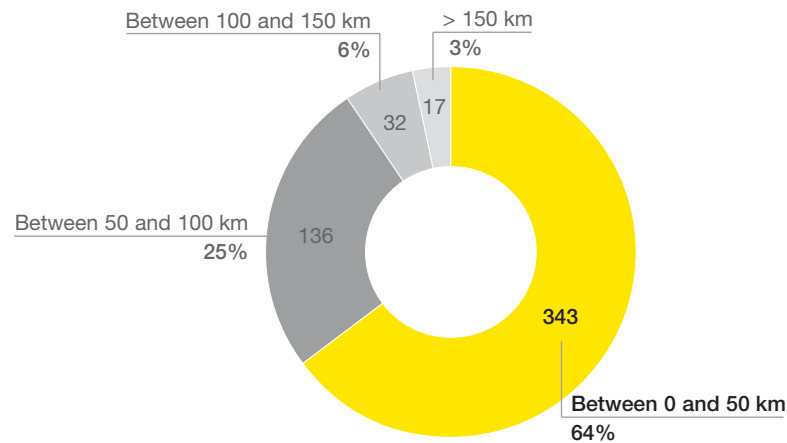


# GETTING OUT & ABOUT AND CAR USE

When you use your car on a daily basis, is it mainly for?



What average daily distance do you cover?

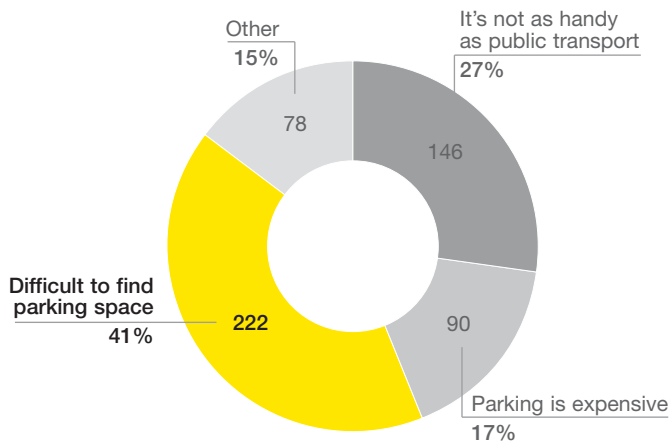


89% OF URBAN AND PERI-URBAN TRAVELLING CONSISTS OF COMMUTING FROM HOME TO WORK FOR TRIPS NOT EXCEEDING 100 KM.



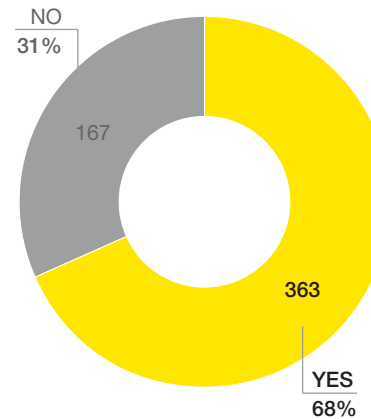
# GETTING OUT & ABOUT AND CAR USE

When you don't take your car to get about town, is it because?



PROBLEMS RELATED TO DIFFICULT PARKING IN CITIES IS THE NUMBER ONE CAUSE FOR PEOPLE NOT USING THEIR CARS.

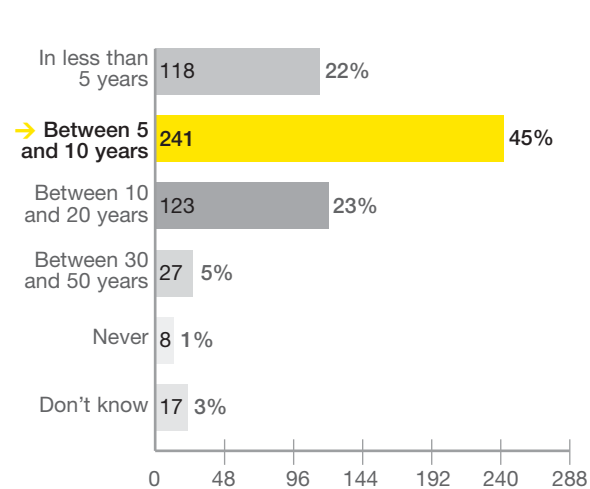
Is owning a car important for you or are you prepared to simply rent a car if it turns out to be financially more attractive?



ALSO, A MAJORITY OF THE SAMPLE (68%) SEEMS RECEPTIVE TO THE IDEA OF RENTING A CAR IF THIS WAS PERCEIVED TO BE FINANCIALLY ATTRACTIVE.

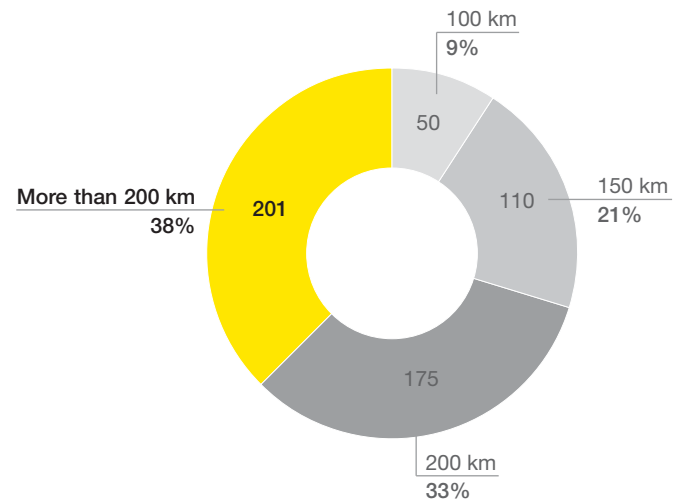
# FOCUS ON ELECTRIC VEHICLE

When do you think the electric car will become the most popular way of getting around town?



THE MAJORITY OF THE SAMPLE (67%) THINK THE ELECTRIC CAR WILL BE PREDOMINANT IN THE NEAR FUTURE (BETWEEN 5 AND 10 YEARS) AS A CREDIBLE ALTERNATIVE TO THE INTERNAL COMBUSTION ENGINE IN CITIES.

In your opinion, what distance do you have to cover for an electric car to become a viable proposition?

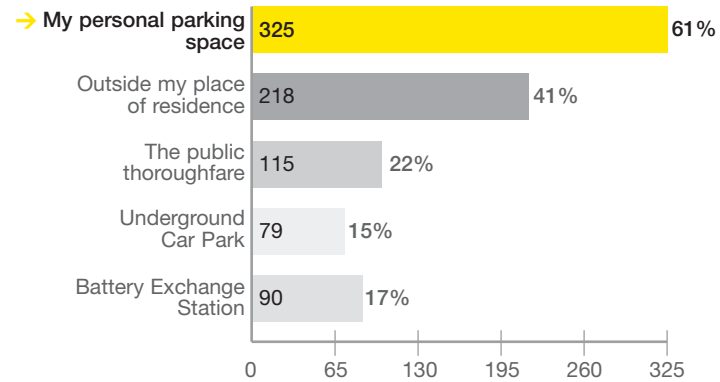


THE RANGE ISSUE REMAINS THE BIGGEST DRAWBACK FOR THE MAJORITY OF THE SAMPLE (91%), AS THIS IS SITUATED BEYOND THE 150 KM LIMIT AT PRESENT.



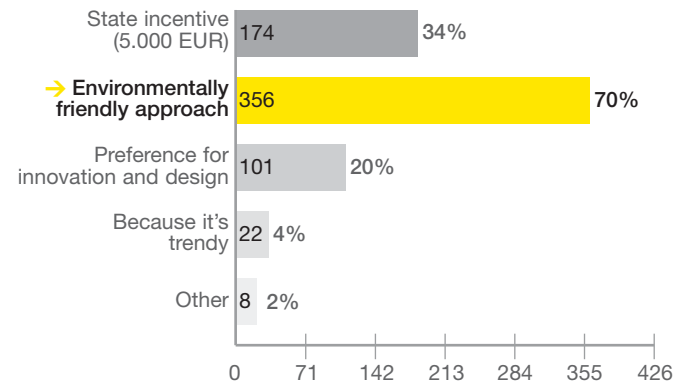
# FOCUS ON ELECTRIC VEHICLE

Where will you go to recharge your electric car?



THE RECHARGING ISSUE SEEMS TO BE CLEARER IN THE LIGHT OF THE RESULTS COLLECTED. MOST OF THE SAMPLE WOULD PREFER RECHARGING AT HOME OR NOT TOO FAR AWAY FROM THEIR PLACE OF RESIDENCE. BATTERY QUICK-DROP ONLY RECEIVED 17% APPROVAL.

What would encourage you to use an electric car?

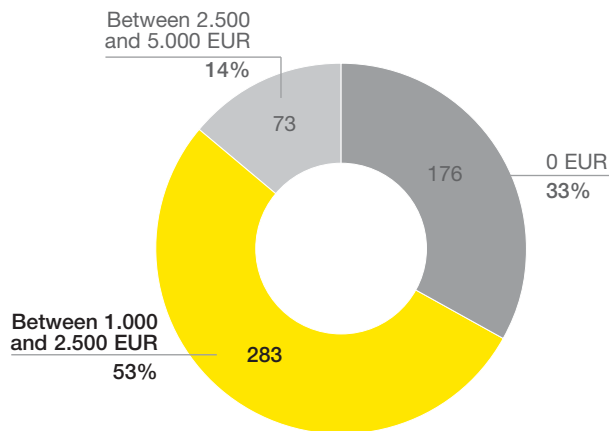


THE TAKE UP OF THE EV STEMS FROM ENVIRONMENTAL CONSIDERATIONS MORE THAN GOVERNMENTAL BONUSES, WHICH COMES SECOND ON THE LIST.



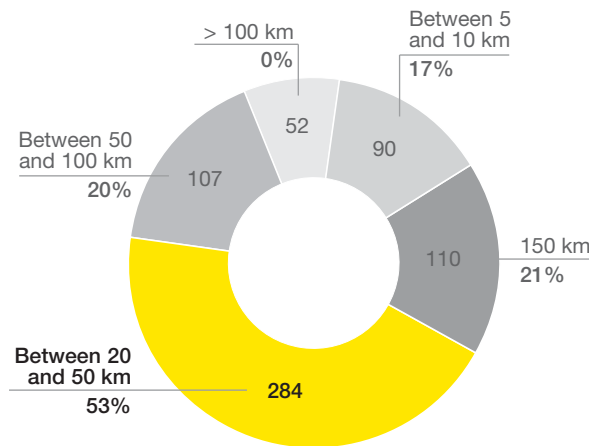
# FOCUS ON ELECTRIC VEHICLE

Would you be prepared to pay more for an electric car? If so, how much?



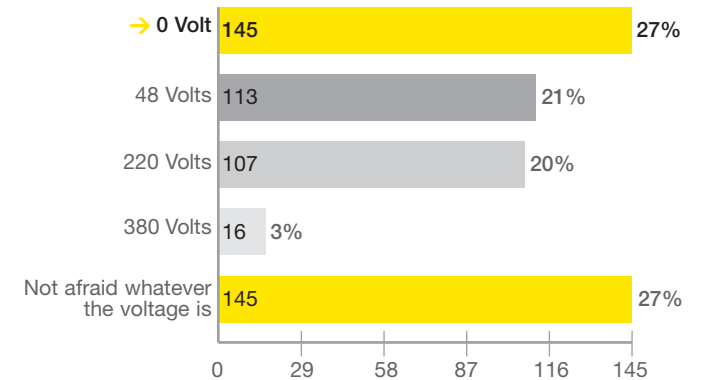
53% OF THE SAMPLE ARE PREPARED TO PAY AN EXTRA 1,000 TO 2,500 EUR FOR AN EV WHEREAS 33% REFUSE TO PAY OVER THE ODDS.

When do you think you have to recharge with the following range left?



THE PROBLEM OF «RANGE ANXIETY» SEEMS TO BE AN ISSUE WITH 73% OF THOSE SAMPLED THINKING THAT THE CAR HAS TO BE RECHARGED WITH BETWEEN 20 AND 100 KM OF RANGE LEFT.

What's the maximum current you would accept to handle when recharging your car using an electric cable in the rain?

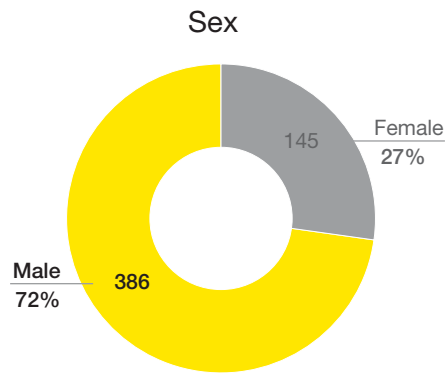


73% OF THE SAMPLE FEEL SOME APPREHENSION ABOUT HANDLING ELECTRIC CABLES DURING THE RECHARGING PROCESS.

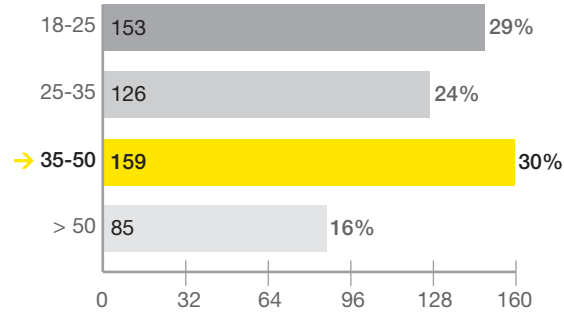


# PERSONAL DATA

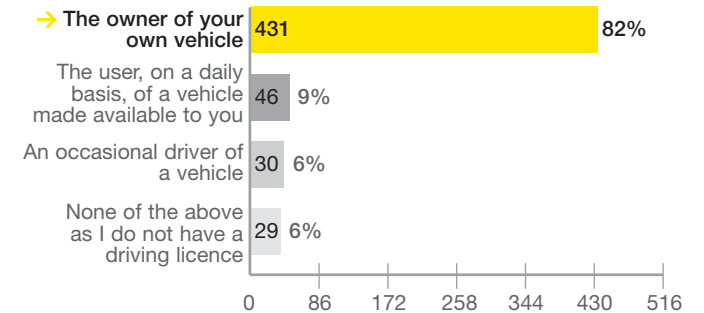
Who are you?



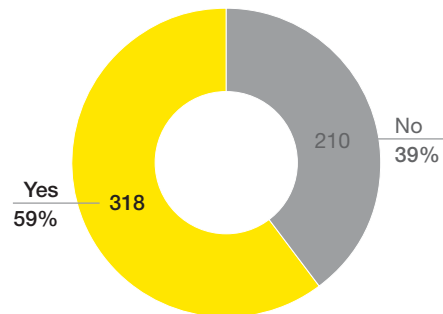
Age



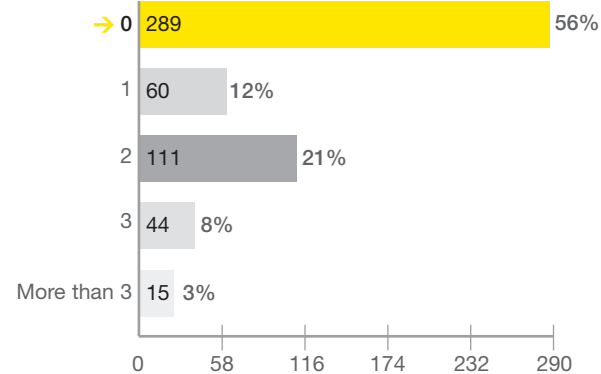
Are you?



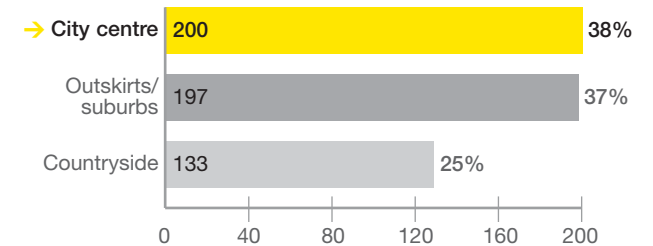
Married / Living together



Do you have children?

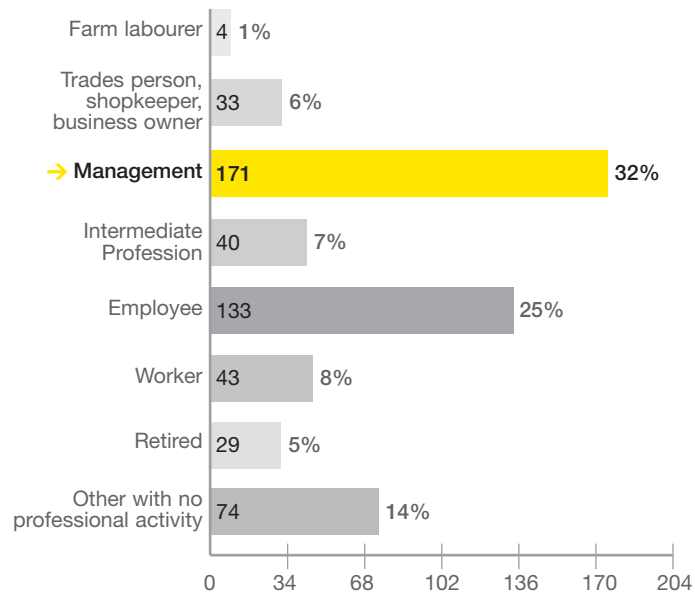


Where do you live?

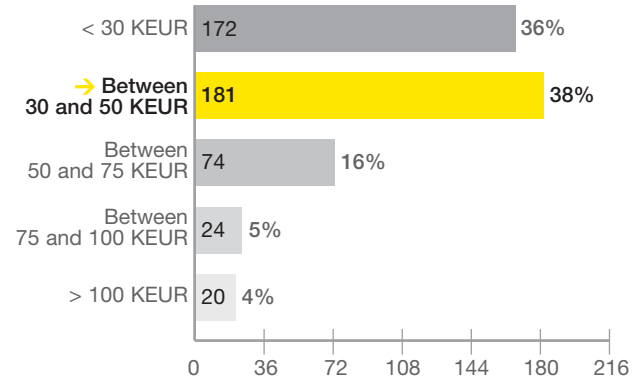


# PERSONAL DATA

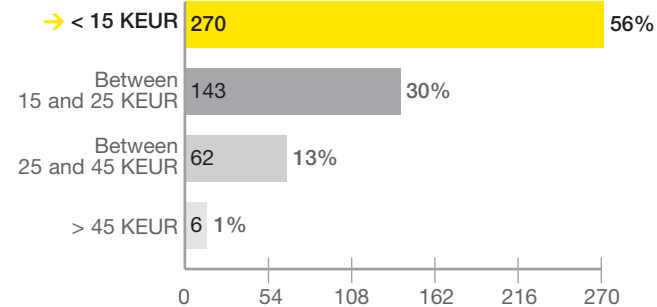
Social and professional status  
(In line with National Statistics Office)



Annual household revenue



How much did you pay for your last car?



# CONCLUSIONS

- **The sample seems receptive to the new engines on offer** with the EV being perceived as especially attractive.
- **Constant habits of use are worthy of note:** Most urban and peri-urban travelling takes place mainly in cars over distances not exceeding 100 km on a daily basis. Parking remains the number 1 obstacle to city centre driving.
- A deeper trend seems to be on the rise: **a car usage less based on the notion of «status» and more focused on responsible consumption and being a «good citizen».** The notion of car possession seems to be losing ground to that of rental if the global offer is attractive.
- **The idea of paying more for an EV seems to be acceptable to the sample (1.000 to 2.500 EUR)** for the purchase of an electric car in the future.
- **The issues of battery range and handling electric cables** during the recharging process seem to be the biggest stumbling blocks when it comes to the uptake of the EV.
- **Around half of the sample think it will take between 5 and 10 years for the EV to be widely taken up in cities.** The general public realises that its uptake is closely linked to the roll-out of adequate infrastructures. (Quotes: «there aren't any recharging stations in my town», «we won't be able to recharge in winter when there's a peak in consumption of electricity», «we'll have to change the electric meter at home»). However, 2/3 believe the EV will be widespread in less than 10 years in city centres.
- **When diesel engine cars have a range of 1000 km, it's only logical to expect EVs to have a range of above or equal to 200 km** (71% of the sample). However, this expectation is not in line with present car usage. 89% say they cover less than 100 km per day. The recharging of an EV every night or the frequent topping up in town has not been fully taken on board. The idea of running out of energy is perceived in the same way as for internal combustion engine (ICE) cars. (Quote: «I think about filling up when I get down to my last 50 km»).

## TO CONCLUDE: THERE ARE TWO MAJOR POINTS TO REMEMBER

- 1 Because of the absence of points of reference to daily use of an EV, the **sample answers reflect the spontaneous comparison of drivers who drive ICE cars.**
- 2 **The success of the EV seems to depend on two factors. The comparable cost of that of an ICE vehicle as well as that of range which would have to be greater.** Solving this equation means either making significant progress in battery performance (hypothetical at the moment) or by rolling out available recharging infrastructures which are easy to access and easy to use.



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