



# Small Fleets, Big Impact: A National Study of EV Adoption Among SMBs

February 2026



# Objective



- As states push towards zero-emission vehicle mandates, commercial fleet owners are grappling with the transition to electric vehicles (EVs). While many recognize the potential benefits, significant barriers remain – from vehicle availability and performance to infrastructure needs and costs
- Mitra EV in partnership with the Clean Cities Coalition, seeks to understand the current landscape for EV adoption among small to medium-sized fleets



# Methodology

## Qualitative 1-on-1 Interviews with Small Business Fleet Owners

Online interviews were conducted among owners/managers of light- to medium-duty (Class 2b-6) commercial vehicle fleet owners from Home Services enterprises in the four target states



**California**  
(12 interviews)



**Georgia**  
(4 interviews)



**Colorado**  
(4 interviews)



**Ohio**  
(4 interviews)

## Quantitative Online Survey with Small Business Fleet Owners

An online survey was conducted among similar commercial vehicle fleet owners in the four target states



**California**  
(n=72)



**Georgia**  
(n=78)



**Colorado**  
(n=70)



**Ohio**  
(n=73)

ReconMR was contracted to conduct both the qualitative and quantitative portions of the study



# Executive Summary



# Executive Summary – Current State of the Market



## Current State & Interest



### Knowledge & Likelihood

Knowledge about commercial EVs varies, with only 26% nationally feeling highly knowledgeable. Similarly, 39% nationally report being likely to electrify.

- EV Adopters are significantly more knowledgeable about EVs for their fleet types. Consequently, Adopters are much more likely to consider further electrifying their fleet compared to Non-Adopters



### Political Leaning

Fleet owners identifying as Liberals are most likely to electrify (41%) compared to Moderates and Conservatives both at 24% likely to electrify their fleets



### Information Sources

Online research (72%) and dealerships/leasing companies (62%) are the primary sources for information on electrification.



### Vehicle Selection

Smaller commercial EV (e.g., class 2b) have significantly higher penetration than larger ones



# Executive Summary – How to Further EV Adoption

Widespread commercial EV adoption will depend on addressing these core needs and concerns in the coming years

## ○ More EV options that meet diverse commercial needs

## ○ Improved range and payload capacities

- *"That is my main issue with EV... fossil fuel I think is for anything big that requires a lot of lifting or heavy weight is still the ideal vehicle for us... I really got a F650 truck that I have an insulation machine that we have full of insulation to insulate homes. So I mean I wouldn't be able to go down the block with that if it was an EV truck because just the weight and all the equipment in it."*

## ○ Comprehensive, turnkey solutions for vehicle acquisition and infrastructure

- *"So they dig the holes and they run the line and they put in the charger and they bring in the truck and they go, there you go. That would be handy... Now, if you get somebody who can do all that in one package, then that's something to look at."*

## ○ Clear information on total cost of ownership and ROI timelines

- *"You're telling me I can generate, what do you want to call it, a thousand more dollars a month in profit by taking level two charging and offering it as a solution... Well, sure, I'd want to do that, but again, I don't want to spend six months going through the process either."*

## Simplified access to incentives and funding programs

- *"I see that there's government assistance as far as getting started with charging stations and stuff like that. However, as I was mentioning before, with all the things that a person like myself has going on, we don't always have the time to dive into it and find out what that assistance is."*

## ○ Assurances about long-term reliability and support

- *"...when it goes down, it's a pain in the ass to get back up because we don't have a technician on staff. The shop that we take it to doesn't have a technician. So we rely on the manufacturer to have a technician who is based here in Denver to make time, well, I need it now, I don't need it three days from now. And that makes it difficult where the number of technicians available to work on it is limited as well."*



# Executive Summary – Conclusion and Implications



## Conclusion

While common drivers like potential cost savings and emerging regulatory landscapes influence fleet electrification, significant state-level variations are evident

- **California** generally demonstrates higher EV knowledge and more positive perceptions regarding EV benefits (e.g., long-term savings, reduced maintenance) but also voices strong concerns about installation costs and vehicle availability
- **Colorado** operators report lower EV knowledge levels and have higher range expectations
- **Georgia** operators are characterized by distinct vehicle acquisition patterns, including a greater use of mixed new/used vehicle purchases and traditional leases
- **Ohio** operators exhibit lower confidence in charging infrastructure adequacy and place a comparatively higher emphasis on vehicle maintenance costs and direct EV vs. ICE cost comparisons when considering electrification

Understanding these specific regional nuances is crucial for developing targeted and effective strategies to support and accelerate commercial fleet electrification. Overcoming the adoption hurdles will likely require addressing the key cost and infrastructure concerns, closing the knowledge gap, particularly among Non-Adopters, and potentially targeting segments like Class 2B vehicle owners who show fewer initial concerns about range and load capacity



# Executive Summary – Conclusions and Implications



## Empower Dealerships as Trusted Educators

Dealerships are SMBs' main channel for both vehicle purchases (80%) and EV information (62%), yet most lack tools to advise on charging or incentives. Training and resources would position them as trusted guides.



## Modernize Incentive Design for Real-World Use Cases

Incentive programs should not assume fleets will self-deploy and own EVs and infrastructure. Policies must support third-party providers who deliver bundled vehicle-and-charging solutions — a model more accessible and scalable for SMBs



## Invest in Shared Truck Charging Hubs

Most SMBs cannot install private DC fast chargers, and public charging rarely works for fleets, with small stalls and inconsistent access. Purpose-built shared hubs are essential, especially in space-constrained or disadvantaged areas.



## Use Smaller Electric Trucks as Gateways to Electrification

The hardest hurdle is initial adoption. Generous support for a fleet's first EVs and charger (especially lower-risk pickups and vans) removes friction, builds confidence, and triggers a snowball effect, broadening adoption and stretching public dollars further.



## Cost-Competitiveness Does Not Eliminate the Need for Support

Even at TCO parity, SMBs face non-financial barriers like navigating incentives, permitting, and trusting newer OEMs. Well-structured programs along with incentives that mitigate risk and complexity are key to sustaining adoption.



# Current Fleet Behaviors



# Current State of Fleet Electrification

## A Limited but Growing EV Adoption



While a majority of small commercial fleets have not yet adopted EVs, many have purchased a few electric commercial vehicles.



The majority are still operating fully gas/diesel fleets but are aware of coming mandates and starting to explore options.

## What Drives Interest in EVs



### Regulatory compliance – preparing for California's 2035 zero-emission mandate

"I know that by I think 2035, the goal is to move things over to more electric vehicles."



### Potential fuel and maintenance cost savings

"We could probably buy five brand new electric vehicles with the cost of fuel we pay. I think it's close to a half a million dollars a year and it just goes up..."



### Environmental benefits and sustainability goals

"I mean we're aware that we're the main polluters, we're the one causing these issues with climate"



### Tax incentives and rebates

"I just saw a voucher for one of the trucks that we are leasing, and it was \$119,000 vehicle bright drop, and the rebate was \$94,000 from California, which is incredible to me."



# Typical Buying/Leasing Habits

Almost all (91%) Fleet Managers buy either new or a mix of used/new vehicles.

- EV Adopters are significantly more likely to buy new vehicles.

Purchase Condition	Total	Adopters (Own 1+ EVs) A	Have Considered C	Non-Adopters (Own 0 EVs) N
New	48%	56% <sup>N</sup>	42%	35%
Used	9%	4%	8%	20% <sup>AC</sup>
A Mix of Both	43%	41%	50%	45%

Lease/Own	Total	Adopters (Own 1+ EVs)	Have Considered	Non-Adopters (Own 0 EVs)
Buy your vehicles outright, which may include a loan	68%	64%	74%	71%
Lease your vehicles with a traditional automotive lease	26%	27%	21%	27%
Have an equity lease (e.g., TRAC lease) on your vehicles	5%	7% <sup>N</sup>	5%	2%
Unsure	1%	1%	-	-

Shading indicates a significant difference at the 90% confidence level

Q8 – Do you typically buy or lease your company’s vehicles new or used?; Q9 – Do you most often...;  
BASE: TOTAL (n=293 Total/n=169 Adopters/n=38 Considered/n=86 Non-Adopters)



# Typical Buying/Leasing Habits by State

Georgia operators (55%) are more apt to buy a mix of new/used vehicles than Colorado (34%) and Ohio operators (37%). And Georgia operators (33%) are more apt to lease vehicles with a traditional lease than Colorado operators (19%).

Purchase Condition	Total	CA <sub>B</sub>	CO <sub>C</sub>	GA <sub>D</sub>	OH <sub>E</sub>
New	48%	47%	53%	40%	52%
Used	9%	7%	13%	5%	11%
A Mix of Both	43%	46%	34%	55% <sup>CE</sup>	37%

Lease/Own	Total	CA	CO	GA	OH
Buy your vehicles outright, which may include a loan	68%	65%	79% <sup>BD</sup>	56%	71% <sup>D</sup>
Lease your vehicles with a traditional automotive lease	26%	26%	19%	33% <sup>C</sup>	26%
Have an equity lease (e.g., TRAC lease) on your vehicles	5%	7%	3%	9% <sup>E</sup>	3%
Unsure	1%	1%	-	1%	-

Shading indicates a significant difference at the 90% confidence level

Q8 – Do you typically buy or lease your company’s vehicles new or used?, Q9 – Do you most often...  
 BASE: TOTAL (n=293 Total/n=72 CA/n=70 CO/n=78 GA/n=73 OH)



# Purchase Location/Commercial Space

Fleet operators primarily purchase their vehicles from dealerships (80%) and fleet management companies (52%)

- EV Non-Adopters are significantly more likely to lease their commercial space

Purchase from	Total	Adopters (Own 1+ EVs) A	Have Considered C	Non-Adopters (Own 0 EVs) N
A dealership	80%	84% <sup>N</sup>	82%	72%
A fleet management (Lease) company	52%	60% <sup>N</sup>	58% <sup>N</sup>	35%
A commercial rental company	36%	44% <sup>N</sup>	32%	22%
Other	2%	1%	3%	6% <sup>A</sup>

Commercial Space	Total	Adopters (Own 1+ EVs)	Have Considered	Non-Adopters (Own 0 EVs)
Own	73%	79% <sup>N</sup>	68%	63%
Rent/Lease	27%	21%	32%	36% <sup>A</sup>

Shading indicates a significant difference at the 90% confidence level

Q10 – Where do you buy or lease your vehicles from?; Q11 – Do you own or rent the commercial space for business operations?  
BASE: TOTAL (n=293 Total/n=169 Adopters/n=38 Considered/n=86 Non-Adopters)



# Purchase Location/Commercial Space by State

Ohio fleet operators (82%) are more likely to own their commercial space than California (68%) or Georgia fleet operators (69%).

Purchase from	Total	CA B	CO C	GA D	OH E
A dealership	80%	86%	79%	78%	78%
A fleet management (lease) company	52%	47%	57%	54%	51%
A commercial rental company	36%	36%	34%	42%	30%
Other	2%	1%	4%	-	4%

Commercial Space	Total	CA B	CO C	GA D	OH E
Own	73%	68%	73%	69%	82% <sup>BD</sup>
Rent/Lease	27%	31% <sup>E</sup>	27%	31% <sup>E</sup>	18%

Shading indicates a significant difference at the 90% confidence level

Q10 – Where do you buy or lease your vehicles from?  
Q11 – Do you own or rent the commercial space for business operations?  
BASE: TOTAL (n=293 Total/n=72 CA/n=70 CO/n=78 GA/n=73 OH)



# Parking/Charging

The majority (75%) of businesses park their fleet vehicles on company property

- Almost all businesses with EVs report having onsite charging (86%)

Vehicle Parking	Total	Adopters (Own 1+ EVs)	Have Considered	Non-Adopters (Own 0 EVs)
Commercial Building	 75%	75%	69%	79%
Employee Home	 23%	24%	26%	20%
Other	 2%	1%	5%	2%

Onsite Charging	Adopters (Own 1+ EVs)
Yes	 86%
No	 14%

Q2. Thinking about where your company's vehicles are parked overnight, what percentage are parked at... ?

BASE: TOTAL(n=293 Total/n=169 Adopters/n=38 Considered/n=86 Non-Adopters)

Q3. Do you have any onsite EV charging stations for any of your company's vehicles (other than their homes)?

BASE: OWN OR LEASE AN EV (n=169 Total)



# Overnight Parking by State



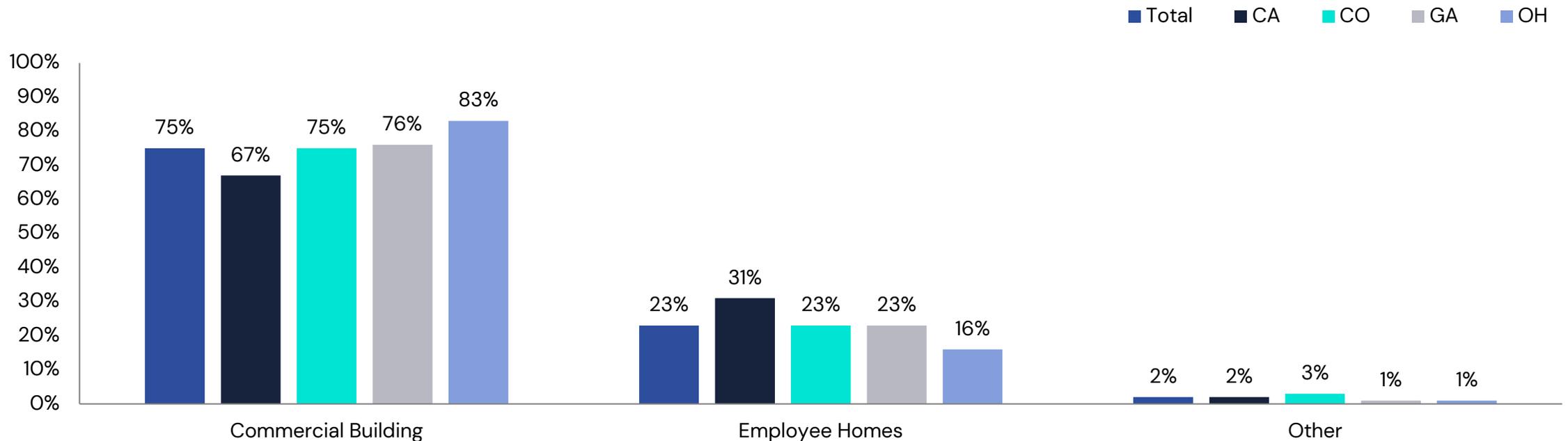
The majority (75%) of businesses park their fleet vehicles on company property

Georgia operators are more likely to say they park their fleet vehicles on company property than California operators; 83% vs. 67%

Ohio operators (83%) are more likely to park fleet vehicles on company property than California (67%) and Colorado (74%) operators

California operators are more likely to park their vehicle fleets at employee homes than in the other three states

## Where Company Vehicles are Parked Overnight



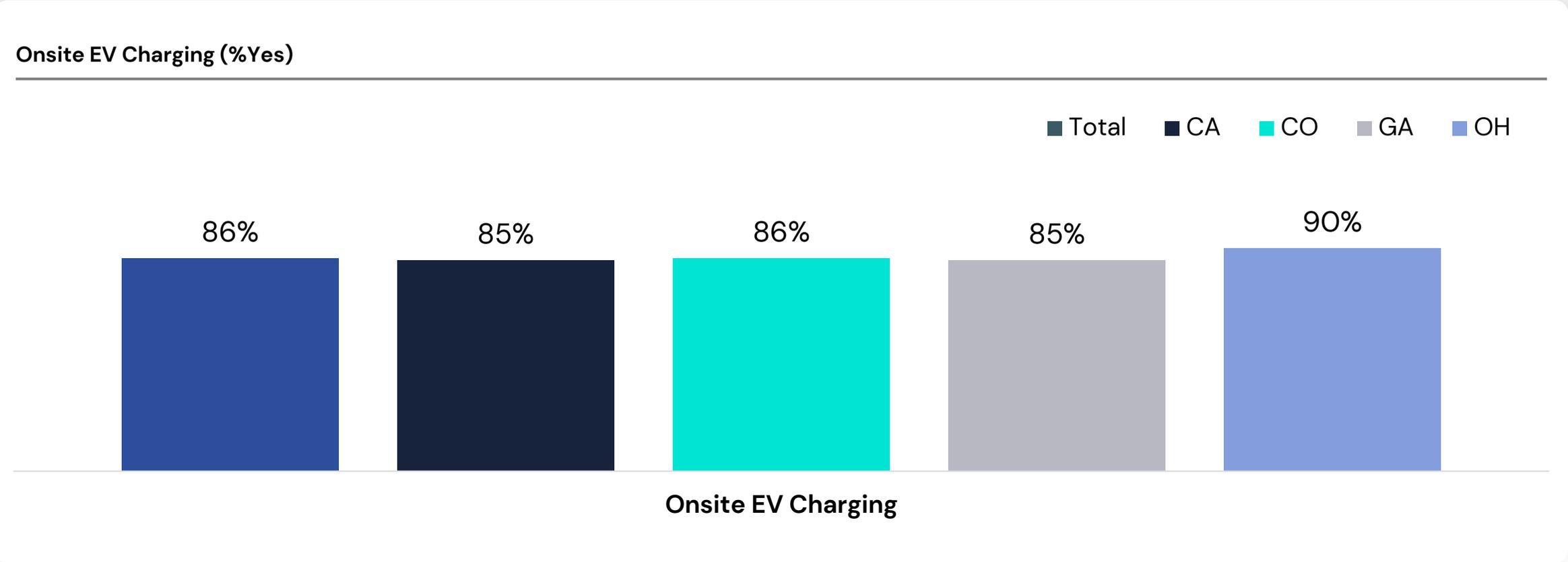
Q2. Thinking about where your company's vehicles are parked overnight, what percentage are parked at... ?  
BASE: TOTAL (n=293 Total/n=72 CA/n=70 CO/n=78 GA/n=73 OH)



# Onsite Charging by State

Almost all businesses with EVs report having onsite charging (86%)

- Differences across states are not significant



Q3 – Do you have any onsite EV charging stations for any of your company’s vehicles (other than their homes)?  
BASE: OWN OR LEASE AN EV (n=169 Total/n=53 CA/n= 35 CO/n= 41 GA ./ n= 40 OH)



# Knowledge of Current EV Fleet & Likelihood to Electrify

Overall, about a quarter (26%) of Fleet Owners feel knowledgeable about EVs and a similar portion (29%) are likely to electrify

- Non-Adopters are significantly less knowledgeable about EVs

Level of Knowledge	Total	Adopters (Own 1+ EVs) A	Have Considered C	Non-Adopters (Own 0 EVs) N
Extremely Knowledgeable (%9-10)	26%	38% <sup>CN</sup>	21% <sup>N</sup>	6%
Somewhat Knowledgeable (%7-8)	35%	44% <sup>N</sup>	34% <sup>N</sup>	17%
Not Very Knowledgeable (%0-6)	39%	18%	45% <sup>A</sup>	77% <sup>AC</sup>

Likelihood to Electrify	Total	Adopters (Own 1+ EVs)	Have Considered	Non-Adopters (Own 0 EVs)
Likely (%9-10)	29%	42% <sup>N</sup>	29% <sup>N</sup>	3%
Somewhat Likely (%7-8)	30%	34% <sup>N</sup>	50% <sup>AN</sup>	13%
Not Very Likely (%0-6)	41%	24%	21%	84% <sup>AC</sup>

Shading indicates a significant difference at the 90% confidence level

Q12 – How knowledgeable would you say you are about EVs for the types of vehicles in your fleet?

Q13 – How likely, if at all, are you to consider electrifying the vehicles your company owns or leases?

BASE: TOTAL (n=293 Total/n=169 Adopters/n=38 Considered/n=86 Non-Adopters)



# Knowledge of Current EV Fleet & Likelihood to Electrify by State

Half of Colorado fleet owners say they are not very knowledgeable about EVs, compared with 36% of California fleet owners and 33% of Georgia fleet owners. And California fleet owners (36%) are more likely to electrify than Colorado fleet owners (21%)

Level of Knowledge	Total	CA <sub>B</sub>	CO <sub>C</sub>	GA <sub>D</sub>	OH <sub>E</sub>
Extremely Knowledgeable (%9-10)	26%	35% <sup>C</sup>	19%	28%	23%
Somewhat Knowledgeable (%7-8)	35%	29%	31%	38%	40%
Not Very Knowledgeable (%0-6)	39%	36%	50% <sup>BD</sup>	33%	37%

Likelihood to Electrify	Total	CA <sub>B</sub>	CO <sub>C</sub>	GA <sub>D</sub>	OH <sub>E</sub>
Likely (%9-10)	29%	36% <sup>C</sup>	21%	33%	25%
Somewhat Likely (%7-8)	30%	31%	33%	24%	32%
Not Very Likely (%0-6)	41%	33%	46%	42%	44%

Shading indicates a significant difference at the 90% confidence level

Q12 – How knowledgeable would you say you are about EVs for the types of vehicles in your fleet?  
 Q13 – How likely, if at all, are you to consider electrifying the vehicles your company owns or leases?  
 BASE: TOTAL (n=293 Total/n=72 CA/n=70 CO/n=78 GA/n=73 OH)



# Purchasing/Leasing Sources of Information

## Fleet Owners use similar sources for researching both ICE and EV purchases

- Online research (69%) and Dealerships (66%) are the primary sources for researching EVs.
- Non-Adopters have done significantly less research across most sources.

	Helpful Sources of Information on EVs	Adopters	Have Considered	Non-Adopters	Helpful Sources of Information on ICEs	Adopters (A)	Have Considered (C)	Non-Adopters (N)
Online research	69%	69%	NA	NA	69%	69%	84% <sup>AN</sup>	63%
Dealership/leasing company	66%	66%	NA	NA	56%	56%	50%	59%
Buyer reviews	53%	53%	NA	NA	47%	50% <sup>N</sup>	63% <sup>N</sup>	33%
Social media	49%	49%	NA	NA	33%	44% <sup>CN</sup>	13%	19%
Trade associations	40%	40%	NA	NA	32%	33%	32%	29%
Word of mouth	38%	38%	NA	NA	40%	37%	47%	42%
Printed newspaper/magazine	24%	24%	NA	NA	14%	20% <sup>CN</sup>	8%	6%

Shading indicates a significant difference at the 90% confidence level

Q5. What sources of information were most helpful when researching before purchasing or leasing your company's electric vehicles ?; BASE: OWN OR LEASE AN EV (n=169 Total)

Q6. What sources of information were most helpful when researching before purchasing or leasing your company's internal combustion engine vehicles ? BASE: TOTAL (n=293 Total/n=169 Adopters/n=38 Considered/n=86 Non-Adopters)



# Purchasing/Leasing Sources of Information by State

## Fleet Owners use similar sources for researching both ICE and EV purchases

- California fleet owners (72%) are more likely to cite a dealership/leasing company as a helpful source of information on EVs than Colorado fleet owners (54%)
- Two-thirds of California and Georgia fleet owners alike cite a dealership/leasing company as a helpful source of information for ICE vehicles, compared with just 44% of Ohio fleet owners

	Helpful Sources of Information on EVs	CA <sub>B</sub>	CO <sub>C</sub>	GA <sub>D</sub>	OH <sub>E</sub>	Helpful Sources of Information on ICEs	CA <sub>B</sub>	CO <sub>C</sub>	GA <sub>D</sub>	OH <sub>E</sub>
Online research	69%	68%	71%	66%	73%	69%	74%	63%	71%	70%
Dealership/leasing company	66%	72% <sup>C</sup>	54%	66%	68%	56%	63% <sup>E</sup>	56%	62% <sup>E</sup>	44%
Buyer reviews	53%	57%	54%	51%	48%	47%	53% <sup>C</sup>	33%	56% <sup>C</sup>	44%
Social media	49%	51%	49%	54%	43%	33%	38%	27%	37%	29%
Trade associations	40%	42%	43%	37%	38%	32%	29%	36%	29%	33%
Word of mouth	38%	45%	40%	29%	35%	40%	46%	46%	35%	33%
Printed newspaper/magazine	24%	32%	23%	20%	20%	14%	15%	17%	13%	12%

Shading indicates a significant difference at the 90% confidence level

Q5. What sources of information were most helpful when researching before purchasing or leasing your company's electric vehicles ?

BASE: OWN OR LEASE AN EV (n=169 Total/n=53 CA/n= 35 CO/n= 41 GA ./ n= 40 OH)

Q6. What sources of information were most helpful when researching before purchasing or leasing your company's internal combustion engine vehicles ?

BASE: TOTAL (n=293 Total/n=72 CA/n=70 CO/n=78 GA/n=73 OH)



# Source of Information to Help Electrify Fleet

Fleet operators primarily rely on online research (72%) and dealerships or leasing companies (62%) when seeking information about electrifying their vehicles

- EV Adopters are significantly more likely to utilize social media and print media when deciding to electrify

Information Source	Total	Adopters (Own 1+ EVs) A	Have Considered C	Non-Adopters (Own 0 EVs) N
Online research	72%	71%	82%	70%
Dealership/Leasing company	62%	60%	66%	64%
Buyer reviews	48%	46%	66% <sup>AN</sup>	45%
Trade associations/business groups	39%	43% <sup>N</sup>	42%	30%
Word of mouth	37%	36%	39%	40%
Social media	35%	46% <sup>CN</sup>	24%	21%
Printed newspaper/magazine	16%	24% <sup>CN</sup>	8%	5%

Shading indicates a significant difference at the 90% confidence level

Q14 – Where would you get information or help if you decided to electrify the vehicles your company uses?  
BASE: TOTAL (n=293 Total/n=169 Adopters/n=38 Considered/n=86 Non-Adopters)



# Source of Information to Help Electrify Fleet by State

California (78%) and Georgia (74%) operators are more apt to rely on online research than Ohio operators (62%). Georgia operators (54%) are more apt to rely on buyer reviews than Colorado operators (40%). Ohio operators (45%) are more apt to rely on trade associations than Colorado operators (31%). And Colorado (40%) and Georgia (41%) operators are more likely to rely on social media than Ohio operators (25%).

Information Source	Total	CA B	CO C	GA D	OH E
Online research	72%	78% <sup>E</sup>	74%	74% <sup>E</sup>	62%
Dealership/Leasing company	62%	63%	64%	65%	55%
Buyer reviews	48%	49%	40%	54% <sup>C</sup>	51%
Trade associations/business groups	39%	44%	31%	35%	45% <sup>C</sup>
Word of mouth	37%	42%	37%	35%	36%
Social media	35%	36%	40% <sup>E</sup>	41% <sup>E</sup>	25%
Printed newspaper/magazine	16%	21%	16%	17%	12%

Shading indicates a significant difference at the 90% confidence level.

Q14 – Where would you get information or help if you decided to electrify the vehicles your company uses?  
BASE: TOTAL (n=293 Total/n=72 CA/n=70 CO/n=78 GA/n=73 OH)



# Consideration for Converting Fleet to EVs

Approximately one third of Non-Adopters report having considered converting their fleet to electric.

Consideration to Convert	Non-EV Owners	Adopters (Own 1+ EVs)	Have Considered	Non-Adopters (Own 0 EVs)
Have Considered (%7-10)	 31%	NA	100%	-
Have Not Considered (%0-6)	 69%	NA	-	100%

Q7 – What has been your previous or current level of consideration for integrating or converting your fleet to EVs?;  
BASE: DO NOT OWN OR LEASE AN EV (n=124 Total/n=0 Adopters/n=38 Considered/n=86 Non-Adopters)



# Consideration for Converting Fleet to EVs

Approximately one third of Non-Adopters report having considered converting their fleet to electric.

Consideration to Convert	Non-EV Owners	CA	CO	GA	OH
Have Considered (%7-10)	 31%	37%	20%	35%	33%
Have Not Considered (%0-6)	 69%	63%	80%	65%	67%

Q7 – What has been your previous or current level of consideration for integrating or converting your fleet to EVs?  
BASE: DO NOT OWN OR LEASE AN EV (n=124 Total/n=19 CA/n= 35 CO/n= 37 GA ./ n= 33 OH)



# EV Adoption by Political Leaning



# Political Beliefs by State

Political beliefs among Fleet Owners are very consistent across states

- California contains more owners who consider themselves Extremely Liberal

Political Beliefs	Total	CA B	CO C	GA D	OH E
<b>NET: LIBERAL</b>	27%	<b>33%</b>	<b>23%</b>	<b>29%</b>	<b>23%</b>
Extremely liberal	6%	14% <sup>CDE</sup>	4%	4%	3%
Liberal	12%	10%	10%	18%	11%
Slightly liberal	9%	10%	9%	8%	10%
<b>Moderate or middle of the road</b>	29%	<b>26%</b>	<b>33%</b>	<b>26%</b>	<b>33%</b>
<b>NET: CONSERVATIVE</b>	38%	<b>33%</b>	<b>36%</b>	<b>41%</b>	<b>41%</b>
Extremely conservative	6%	10%	6%	5%	4%
Conservative	20%	15%	19%	19%	26%
Slightly conservative	12%	8%	11%	17%	11%
<b>Don't know or not political</b>	5%	<b>7%</b>	<b>9%</b>	<b>4%</b>	<b>3%</b>

QF10 – When it comes to politics, do you usually think of yourself as extremely liberal, liberal, slightly liberal, moderate or middle of the road, slightly conservative, conservative, extremely conservative, or haven't you thought much about this?  
 BASE: TOTAL (n=293 Total/n=72 CA/n=70 CO/n=78 GA/n=73 OH)



# Political Beliefs by Adoption

Fleet Owner EV Adopters are split evenly between Conservatives (37%) and Liberals (34%)

- Liberal Fleet Owners are significantly more likely to at least have considered purchasing an EV

Political Beliefs	Total	Adopters (Own 1+ EVs) A	Have Considered C	Non-Adopters (Own 0 EVs) N
<b>NET: LIBERAL</b>	27%	34% <sup>N</sup>	39% <sup>N</sup>	9%
Extremely liberal	6%	7% <sup>N</sup>	11%	2%
Liberal	12%	17% <sup>N</sup>	13% <sup>N</sup>	2%
Slightly liberal	9%	9%	16% <sup>N</sup>	5%
<b>Moderate or middle of the road</b>	29%	27% <sup>C</sup>	13%	41% <sup>AC</sup>
<b>NET: CONSERVATIVE</b>	38%	37%	42%	38%
Extremely conservative	6%	12%	13%	12%
Conservative	20%	18%	26%	20%
Slightly conservative	12%	7%	3%	7%
<b>Don't know or not political</b>	5%	2%	5%	12% <sup>A</sup>

QF10 – When it comes to politics, do you usually think of yourself as extremely liberal, liberal, slightly liberal, moderate or middle of the road, slightly conservative, conservative, extremely conservative, or haven't you thought much about this?

BASE: TOTAL (n=293 Total/n=169 Adopters/n=38 Considered/n=86 Non-Adopters)



# Likelihood to Electrify by Political Beliefs

While Liberal respondents report significantly higher EV adoption rates (71%) and a greater likelihood to consider electrification (41%), over half of all Moderate and Conservative respondents own at least one EV

Current EVs in Fleet	Total	Liberal	Moderate	Conservative
Non-Adopters (0 EVs)	42%	29%	47%	44% <sup>L</sup>
Adopters (1 or more EVs)	58%	71% <sup>MC</sup>	53%	56%

Likelihood to Electrify	Total	Liberal	Moderate	Conservative
Extremely Likely (%9-10)	29%	41% <sup>MC</sup>	24%	24%
Somewhat Likely (%7-8)	30%	31%	28%	31%
Not Very Likely (%0-6)	41%	28%	48% <sup>L</sup>	45% <sup>L</sup>

Shading indicates a significant difference at the 90% confidence level

QS7 – How many electric commercial trucks or vans does your company own or lease?  
Q13 – How likely, if at all, are you to consider electrifying the vehicles your company owns or leases?  
BASE: TOTAL (n=293 Total/n=80 Lib/n=86 Mod/n=111 Cons)



# EV Barriers and Motivations



# Barriers to Adoption



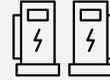
## High upfront costs of vehicles and charging infrastructure

"I think initial cost is my big, big issue is my initial upfront cost as a nonprofit. And that would really be it because it would be the cost of taking out services."



## Range concerns, particularly for long routes or heavy loads

"My client doesn't want to hear. Well, two of our three service vehicles in your market couldn't find a place to charge. That's why they didn't show up. And that happens, right? And I've had it happen. Why is Luke not at X location? Oh, he's charging. Well, what happened? Oh, well, Luke didn't charge it overnight. Well, that's a personnel issue, but if Luke had some more work thrown at him and my range is one 50 and you've already done that by 12, that's what I'm thinking about when I look at new vehicles."



## Lack of charging infrastructure, especially for vehicles that don't return to a central location daily

"That's going to be the biggest roadblock, how are they going to recharge at home? Or do we just have to rely on the job site having a charging station? And again, that's probably not going to happen that often."



## Uncertainty about long-term reliability and maintenance

"We need to have some kind of a track record of faults at certain mileage or hours, whatever the case is, to be able to say, yeah, this is a good idea. But right now, like I said, there is no want to, and there is no proven reliability."



## Limited EV options for commercial vehicles, especially larger trucks

"Right now we have one-ton trucks that pull a trailer and a skid steer on the trailer. Now, as of right now, the way it is, you can do that with a class C license, but now you're talking a one ton, say it's an electric truck and now the weight of the actual truck's going to change the weight. Once a skid steer becomes electric is going to change. It's going to be a lot more than 10,000 pounds. Now do I need to hire a bunch of class A drivers? Do I need to make my Class C drivers class A drivers?"



# Attitudes Toward EVs among Non-Adopters



As expected, EV Adopters are more likely to agree to the benefits of EVs than Non-Adopters.

The largest barriers of EV adoption among Non-Adopters are the expense of installing charging stations (52%), not enough chargers in their area (49%) and the amount of time required to install chargers (43%).

Benefits	EV Adoption								
	Adopters (Own 1+ EVs)			Have Considered			Non-Adopters (Own 0 EVs)		
Overall, EVs will save me money in the long-term over traditional internal combustion engines	4%	40%	56%	5%	42%	53%	20%	63%	17%
EVs need less frequent maintenance	9%	49%	43%	16%	58%	26%	23%	57%	20%
<b>Barriers</b>									
Adding EV charging stations often requires adding existing power capacity	7%	47%	46%	13%	53%	34%	9%	49%	42%
EVs for my fleet have a higher up-front cost than traditional internal combustion engine vehicles	9%	48%	43%	11%	58%	32%	9%	44%	47%
Installing charging stations is an expensive undertaking	11%	54%	34%	3%	47%	50%	9%	38%	52%
There are not enough charging stations in my area to support an EV fleet	21%	47%	32%	16%	55%	29%	10%	41%	49%
Installing charging stations is a lengthy process	18%	51%	30%	13%	68%	18%	10%	47%	43%
The resale value of EVs is lower than traditional internal combustion engine vehicles	20%	48%	33%	11%	71%	18%	14%	62%	24%
I'll have to buy a new battery before I'm ready to return or sell the vehicle	19%	53%	28%	13%	68%	18%	16%	55%	29%
EVs cannot handle the heavy loads we put in our vehicles	36%	39%	25%	39%	42%	18%	22%	47%	31%
EVs do not come in the types and/or sizes of vehicles I need for my fleet	33%	42%	25%	34%	45%	21%	35%	37%	28%
Current EVs do not have the range that my business will need daily	27%	47%	25%	34%	42%	24%	26%	50%	24%
Researching fleet electrification is burdensome	25%	51%	24%	34%	42%	24%	27%	47%	27%

■ Disagree ■ Neutral ■ Agree

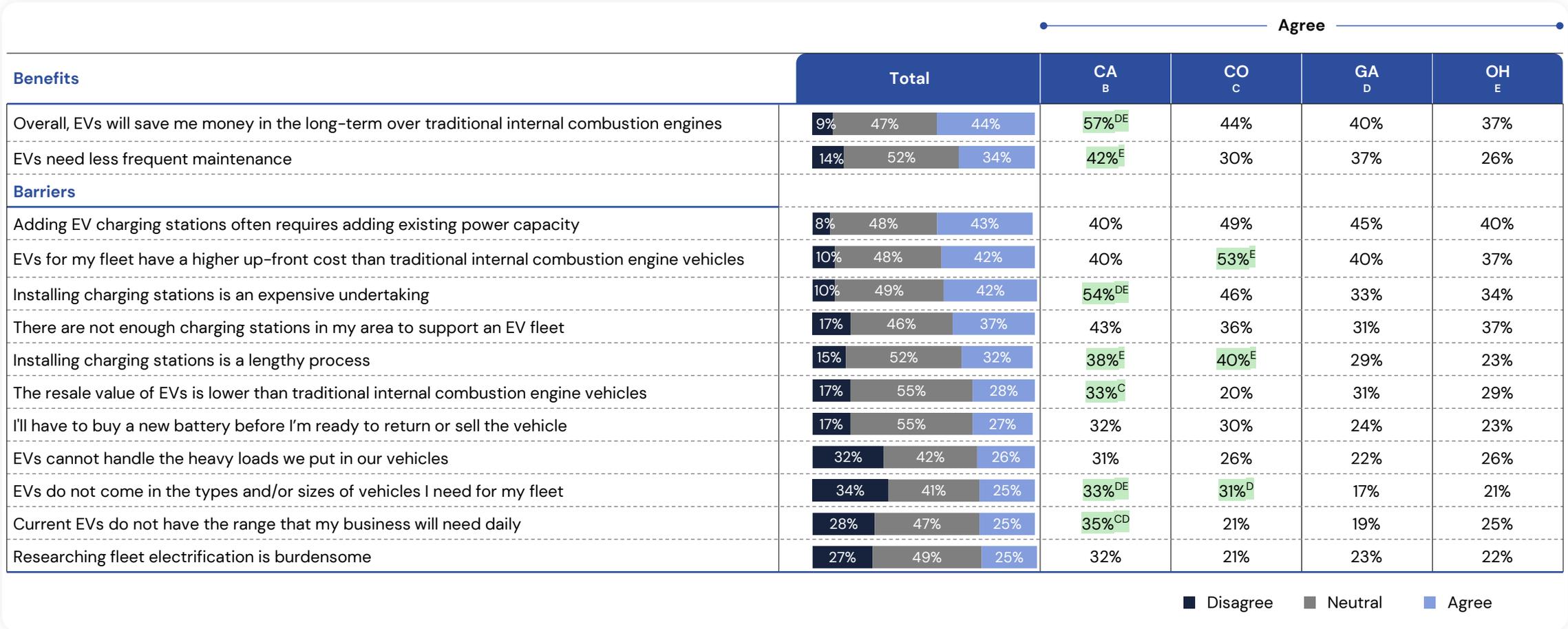
Q24 – Now we'd like to know how much you agree with the following statements about EVs.  
 BASE: TOTAL (n=293 Total)



# Attitudes Toward EVs by State



57% of California fleet owners agree EVs offer long-term savings, compared with just 40% of Georgia fleet owners and 37% of Ohio fleet owners. California fleet owners (42%) are also more likely to agree that EVs need less maintenance than Ohio fleet owners (26%).



Q24 – Now we'd like to know how much you agree with the following statements about EVs.  
 BASE: TOTAL (n=293 Total/n=72 CA/n=70 CO/n=78 GA/n=73 OH)



# Attitudes Toward EVs by Vehicle Class



**Fleet Owners with only Class 2B vehicles present a more approachable market segment.**

Owners with only Class 2B vehicles are less concerned about range and load of the vehicles, while being more concerned with charging stations and upfront costs.

Benefits	Electric Vehicle Class		
	Class 2B EVs Only	Class 2B + Other EVs	Class 3+ EVs Only
Overall, EVs will save me money in the long-term over traditional internal combustion engines	4% 49% 47%	4% 30% 66%	42% 58%
EVs need less frequent maintenance	15% 49% 36%	5% 45% 50%	62% 38%
<b>Barriers</b>			
Adding EV charging stations often requires adding existing power capacity	4% 47% 49%	8% 51% 41%	4% 46% 50%
EVs for my fleet have a higher up-front cost than traditional internal combustion engine vehicles	9% 49% 43%	9% 45% 46%	15% 54% 31%
Installing charging stations is an expensive undertaking	9% 51% 40%	14% 54% 32%	12% 69% 19%
There are not enough charging stations in my area to support an EV fleet	19% 47% 34%	20% 51% 28%	35% 38% 27%
Installing charging stations is a lengthy process	17% 51% 32%	19% 50% 31%	31% 50% 19%
The resale value of EVs is lower than traditional internal combustion engine vehicles	23% 51% 26%	16% 49% 35%	15% 46% 38%
Researching fleet electrification is burdensome	23% 53% 23%	19% 57% 24%	38% 42% 19%
EVs do not come in the types and/or sizes of vehicles I need for my fleet	30% 49% 21%	34% 41% 26%	38% 42% 19%
I'll have to buy a new battery before I'm ready to return or sell the vehicle	19% 60% 21%	15% 49% 36%	23% 54% 23%
EVs cannot handle the heavy loads we put in our vehicles	36% 47% 17%	32% 38% 30%	50% 35% 15%
Current EVs do not have the range that my business will need daily	28% 57% 15%	26% 42% 32%	31% 46% 23%

■ Disagree ■ Neutral ■ Agree

Q24 – Now we'd like to know how much you agree with the following statements about EVs.  
 BASE: EV OWNERS (n=47 Class 2B/n=74 Class 2B + Others/n= 26 Class 3 + Others)

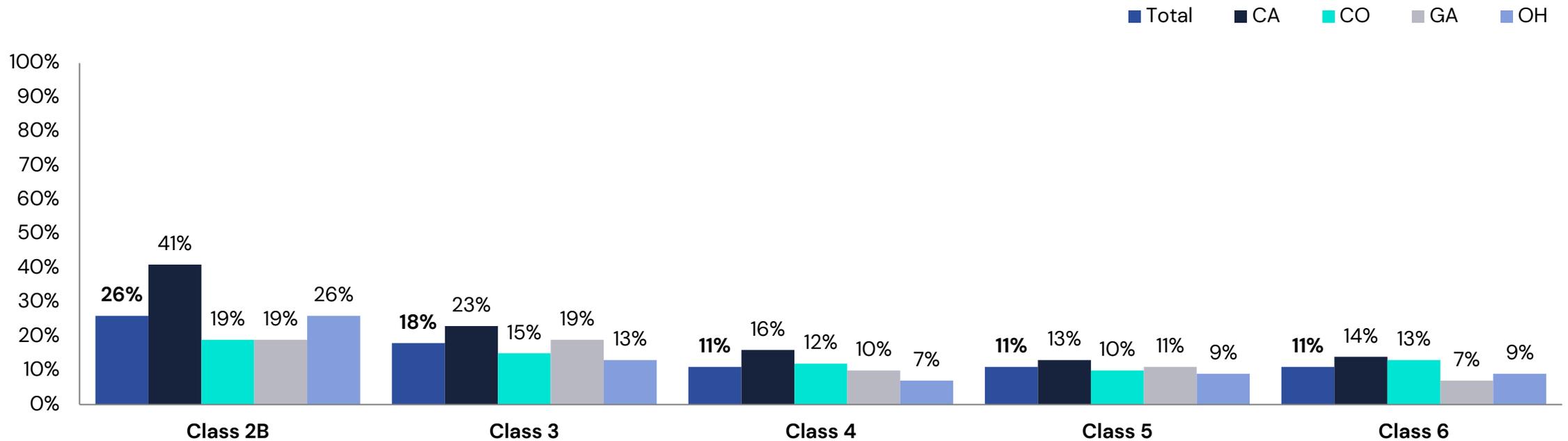


# Electric Vehicles Being Utilized Among Adopters

Class 2B and Class 3 vehicle fleets show a higher conversion to EVs

- California leads the way in EV conversion across all vehicle classes

Percent of Commercial EVs in Fleet



Q1. Earlier you mentioned that you had [S5] Class 2b-6 vehicles. How many of each type do you have? And how many are EVs?  
BASE: TOTAL (n=293 Total/n=72 CA/n= 70 CO/n= 78 GA/n= 73 OH)



# EV Conversion Factors

## MaxDiff Analysis



# MaxDiff Analysis



MaxDiff is a survey research methodology used to rank the importance of items using trade-offs among items. Survey respondents are asked to select the “most important” item and the “least important” among a subset of items from the total list of items. Survey respondents will make these “most important/least important” trade-offs over several randomized subsets



In our research, we had a list of 28 items. Survey respondents were asked to choose the most important item and the least important item among six items from the list. They completed this exercise 14 times. See the screenshot on the right

How important are the following factors when thinking about converting your fleet to at least some electric vehicles?

Please choose the item that is most important and least important.

How important is...

(1 of 1)

Most Important		Least Important
<input type="radio"/>	Having the ability to schedule time to charge at fast chargers that are also used by others for vehicle charging	<input checked="" type="radio"/>
<input checked="" type="radio"/>	Having sufficient charging stations throughout your vehicles' driving range	<input type="radio"/>
<input type="radio"/>	Having a turnkey solution complete with vehicle and charging as a bundled offering for electrifying your fleet	<input type="radio"/>
<input type="radio"/>	Having a sufficient number of maintenance vendors to service EVs	<input type="radio"/>
<input type="radio"/>	The lower frequency of vehicle maintenance	<input type="radio"/>
<input type="radio"/>	That your vehicles can make it through the business day without needing to be charged again	<input type="radio"/>



# Importance Factors for EV Fleet Conversion – By Adoption



The most important factors for companies thinking about converting their fleet to EVs are shown below.

Costs (both fuel and purchase) as well as vehicle capability (both range and load) are the most important factors across all segments.

Having the costs clearly outlined is very important for fleet managers who have considered, but not yet adopted.

Most Important	Total	Adopters (Own 1+ EVs)	Have Considered	Non-Adopters (Own 0 EVs)
Save on fuel costs	5.46	5.40	5.39	5.61
Vehicles can make it through the business day without need to be charged again	5.25	5.25	4.50	5.53
The overall cost of the vehicle to purchase or lease	5.10	4.63	6.45	5.34
That the vehicle can carry any heavy load you need to put in that vehicle	4.77	4.52	5.30	5.08
Vehicle and charging as a bundled offering for electrifying your fleet	4.65	4.90	4.19	4.36
The ability to have fast chargers (DCFC) on your property for quick top offs	4.59	4.77	3.63	4.64
The lower cost of vehicle maintenance	4.59	4.61	5.18	4.25
How the costs compare between EVs and internal combustion engines for your fleet	4.57	4.78	3.95	4.43
The ability to access fast chargers (DCFC) throughout your vehicles' drive range	4.36	4.66	3.46	4.16
The costs involved in converting my fleet are clearly outlined	4.30	4.02	5.58	4.23
Have sufficient charging stations throughout your vehicles' driving range	4.29	4.41	3.81	4.26
That there are no upfront costs when convert your vehicle fleet	4.16	3.85	4.43	4.58
Time to charge at fast chargers that are also used by others for vehicle charging	4.08	4.48	3.45	3.52
The ability to have sufficient chargers where the vehicles are parked overnight	4.07	4.11	3.58	4.18

Q25 – How important are the following factors when thinking about converting your fleet to at least some electric vehicles? MaxDiff Results  
BASE: TOTAL (n=293 Total)



# Importance Factors for EV Fleet Conversion – By Adoption



The less important factors for electrification are shown below.

How the vehicle is purchased, resale value of the vehicle as well as being a role model for other companies are consistently among the least important.

	Total	Adopters (Own 1+ EVs)	Have Considered	Non-Adopters (Own 0 EVs)
The lower frequency of vehicle maintenance	3.70	3.53	4.79	3.55
There are a wide variety of vehicle types and sizes to meet your needs	3.61	3.52	4.03	3.63
The setup of the charge stations is done quickly	3.56	3.77	3.64	3.15
Have the ability to sufficiently test drive an EV before purchasing or leasing	3.50	3.72	3.72	2.98
You're ahead of any regulatory compliance regard commercial vehicles	3.29	3.34	3.04	3.29
Reduce emissions from your vehicle fleet	3.27	3.19	4.46	2.95
Have a sufficient number of maintenance vendors to service EVs	3.27	3.26	3.29	3.26
The setup of the charge stations uses existing power capacity	3.23	3.21	2.41	3.64
Have a battery storage system onsite as a power backup	3.19	3.24	2.86	3.24
The ability to have flexible payment or lease plans for your vehicles	3.16	3.27	3.08	2.98
You won't have to replace the battery before you're ready to replace that vehicle	2.97	3.07	3.21	2.71
Your company is a role model for other companies in your community	2.73	2.64	2.82	2.92
The resale value of your vehicle when you're ready to replace that vehicle	2.66	2.75	2.49	2.57
The ability to lease OR buy your vehicles, depend on your needs	2.59	2.70	2.35	2.49

Least Important |

Q25 – How important are the following factors when thinking about converting your fleet to at least some electric vehicles? MaxDiff Results  
 BASE: TOTAL (n=293 Total)



# Importance Factors for EV Fleet Conversion – By State

The most important factors for companies thinking about converting their fleet to EVs are shown below

- Priorities are similar across the states with Costs (both fuel and purchase) being the highest priorities along with making sure the vehicle can make it through the day on one charge
- Fleet Owners in Ohio gave a higher priority to vehicle maintenance costs and the comparison of costs between EVs and ICEs

Most Important

	CA B	CO C	GA D	OH E
Save on fuel costs	4.65	5.42	5.93	6.01
Vehicles can make it through the business day without need to be charged again	5.35	5.53	5.03	5.11
The overall cost of the vehicle to purchase or lease	4.74	4.96	5.48	5.21
That the vehicle can carry any heavy load you need to put in that vehicle	4.24	4.35	5.32	5.13
Vehicle and charging as a bundled offering for electrifying your fleet	4.6	4.98	4.5	4.54
The ability to have fast chargers (DCFC) on your property for quick top offs	4.21	4.94	4.29	4.98
The lower cost of vehicle maintenance	4.17	3.93	4.89	5.3
How the costs compare between EVs and internal combustion engines for your fleet	3.99	4.71	4.5	5.15
The ability to access fast chargers (DCFC) throughout your vehicles' drive range	4.01	4.86	3.91	4.7
The costs involved in converting my fleet are clearly outlined	4.22	4.02	4.48	4.45
Have sufficient charging stations throughout your vehicles' driving range	4.3	4.29	4.16	4.42
That there are no upfront costs when convert your vehicle fleet	4.13	4.18	4.17	4.15
Time to charge at fast chargers that are also used by others for vehicle charging	3.93	4.48	3.83	4.14
The ability to have sufficient chargers where the vehicles are parked overnight	4.35	4.08	3.97	3.87

Q25 – How important are the following factors when thinking about converting your fleet to at least some electric vehicles? MaxDiff Results  
 BASE: TOTAL (n=293 Total/n=72 CA/n=70 CO/n=78 GA/n=73 OH)



# Importance Factors for EV Fleet Conversion – By State

The less important factors for electrification are shown below

- How the vehicle is purchased, resale value of the vehicle as well as being a role model for other companies are consistently among the least important

Least Important

	CA B	CO C	GA D	OH E
The lower frequency of vehicle maintenance	3.62	3.36	3.92	3.87
There are a wide variety of vehicle types and sizes to meet your needs	3.81	3.29	3.95	3.39
The setup of the charge stations is done quickly	3.6	3.81	3.37	3.47
Have the ability to sufficiently test drive an EV before purchasing or leasing	3.55	3.78	3.52	3.17
You're ahead of any regulatory compliance regard commercial vehicles	3.28	3.42	3.52	2.96
Reduce emissions from your vehicle fleet	3.57	3.14	3.15	3.16
Have a sufficient number of maintenance vendors to service EVs	2.99	3.49	3.36	3.2
The setup of the charge stations uses existing power capacity	3.28	3.58	3.15	2.92
Have a battery storage system onsite as a power backup	3.33	3.09	3.23	3.11
The ability to have flexible payment or lease plans for your vehicles	3.44	2.95	3.29	3
You won't have to replace the battery before you're ready to replace that vehicle	2.89	3.43	2.82	2.76
Your company is a role model for other companies in your community	2.71	2.76	2.85	2.58
The resale value of your vehicle when you're ready to replace that vehicle	2.71	2.72	2.44	2.82
The ability to lease OR buy your vehicles, depend on your needs	2.75	2.74	2.49	2.38

Q25 – How important are the following factors when thinking about converting your fleet to at least some electric vehicles?  
 BASE: TOTAL (n=293 Total/n=72 CA/n=70 CO/n=78 GA/n=73 OH)



# Charging Concerns



# Range & Charging Concerns

Almost half of all EV Adopters fall into the range sweet spot of 100 to 200 miles.

- EV Non-Adopters are significantly less confident in the charging infrastructure

Needed Range	Total	Adopters (Own 1+ EVs)	Have Considered	Non-Adopters (Own 0 EVs)
Less than 100 miles	12%	6%	21% <sup>A</sup>	19% <sup>A</sup>
100 to 200 miles	39%	46% <sup>CN</sup>	23%	31%
200 to 300 miles	26%	28%	29%	20%
300 or more miles	24%	21%	27%	31%

Confidence in Charging	Total	Adopters (Own 1+ EVs)	Have Considered	Non-Adopters (Own 0 EVs)
Extremely confident	10%	17% <sup>CN</sup>	3%	1%
Very confident	30%	44% <sup>CN</sup>	18%	8%
Somewhat confident	33%	26%	55% <sup>AN</sup>	36%
Not too confident	18%	11%	18%	33% <sup>AC</sup>
Not at all confident	8%	2%	5%	22% <sup>AC</sup>

Shading indicates a significant difference at the 90% confidence level

Q26 – How far would an electric vehicle need to be able to travel before charging is required for you to consider purchasing or leasing one?

Q27 – How confident are you that there will be enough charging stations and infrastructure needed to support large numbers of electric vehicles on the roads?

BASE: TOTAL (n=293 Total/n=169 Adopters/n=38 Considered/n=86 Non-Adopters)



# Range & Charging Concerns by State

- Colorado fleet operators (31%) are more likely to require a range of 300 or more miles than Georgia fleet operators (18%)
- Ohio fleet operators (12%) express less confidence in charging than California fleet operators (4%)

Needed Range	Total	CA <sup>B</sup>	CO <sup>C</sup>	GA <sup>D</sup>	OH <sup>E</sup>
Less than 100 miles	12%	17% <sup>D</sup>	10%	8%	12%
100 to 200 miles	39%	36%	34%	50% <sup>BCE</sup>	33%
200 to 300 miles	26%	25%	24%	24%	29%
300 or more miles	24%	22%	31% <sup>D</sup>	18%	26%

Confidence in Charging	Total	CA	CO	GA	OH
Extremely confident	10%	14%	7%	12%	8%
Very confident	30%	32%	27%	31%	32%
Somewhat confident	33%	33%	36%	33%	29%
Not too confident	18%	17%	20%	18%	19%
Not at all confident	8%	4%	10%	6%	12% <sup>B</sup>

Shading indicates a significant difference at the 90% confidence level

Q26 – How far would an electric vehicle need to be able to travel before charging is required for you to consider purchasing or leasing one?

Q27 – How confident are you that there will be enough charging stations and infrastructure needed to support large numbers of electric vehicles on the roads?

BASE: TOTAL (n=293 Total/n=72 CA/n=70 CO/n=78 GA/n=73 OH)



# Grid Concerns

Less than a quarter of all Fleet Owners (23%) are worried about the stability of the grid to charge their vehicles.

- This is consistent across all segments

Worried About the Grid	Total	Adopters (Own 1+ EVs)	Have Considered	Non-Adopters (Own 0 EVs)
Worried – Agree (%9-10)	 23%	21%	26%	24%
Neutral (%7-8)	 29%	27%	39%	30%
Not Worried – Disagree (%0-6)	 48%	53% <sup>c</sup>	34%	45%

Shading indicates a significant difference at the 90% confidence level

Q28 – How much do you agree or disagree with the following statement? I am worried about the electric grid going down and not being able to charge my vehicles.  
BASE: TOTAL (n=293 Total/n=169 Adopters/n=38 Considered/n=86 Non-Adopters)



# Grid Concerns by State

Less than a quarter of all Fleet Owners (23%) are worried about the stability of the grid to charge their vehicles.

- Differences are not significant across states.

Worried About the Grid	Total	CA	CO	GA	OH
Worried – Agree (%9-10)	 23%	26%	21%	21%	22%
Neutral (%7-8)	 29%	31%	31%	33%	22%
Not Worried – Disagree (%0-6)	 48%	43%	47%	46%	56%

Q28 – How much do you agree or disagree with the following statement? I am worried about the electric grid going down and not being able to charge my vehicles.  
 BASE: TOTAL (n=293 Total/n=72 CA/n=70 CO/n=78 GA/n=73 OH)



# Monthly Costs & Other Concerns



# Range & Charging Concerns

Half of all Fleet Owners spend less than \$2,500 monthly on fuel and less than \$2,000 monthly on maintenance

- Non-Adopters have lower monthly costs than EV Adopters.

Monthly Fuel Costs	Total	Adopters (Own 1+ EVs)	Have Considered	Non-Adopters (Own 0 EVs)
Under \$1,000	 25%	19%	29%	35% <sup>A</sup>
\$1,001 to \$2,500	 25%	25%	18%	27%
\$2,501 to \$5,000	 19%	19%	18%	21%
\$5,001 to \$10,000	 15%	15%	16%	13%
Over \$10,000	 16%	22% <sup>N</sup>	18% <sup>N</sup>	5%
<b>Median</b>	<b>\$2,730</b>	<b>\$3,200</b>	<b>\$3,000</b>	<b>\$2,000</b>

Monthly Maintenance Costs	Total	Adopters (Own 1+ EVs)	Have Considered	Non-Adopters (Own 0 EVs)
Under \$1,000	 39%	28%	52% <sup>A</sup>	53% <sup>A</sup>
\$1,001 to \$2,500	 23%	25% <sup>C</sup>	8%	26% <sup>C</sup>
\$2,501 to \$5,000	 19%	18%	29%	17%
\$5,001 to \$10,000	 5%	8% <sup>N</sup>	-	2%
Over \$10,000	 13%	21% <sup>N</sup>	11% <sup>N</sup>	1%
<b>Median</b>	<b>\$2,000</b>	<b>\$2,500</b>	<b>\$1,000</b>	<b>\$1,000</b>

Q31 – On average, how much do you spend each month on fueling the vehicles in your company's fleet?;

Q32 – On average, how much do you spend each month on maintenance for the vehicles in your company's fleet?;

BASE: TOTAL (n=293 Total/n=169 Adopters/n=38 Considered/n=86 Non-Adopters)

Shading indicates a significant difference at the 90% confidence level



# Range & Charging Concerns by State

- The differences across states for median monthly maintenance and monthly fuel costs are mostly not significant

Monthly Fuel Costs	Total	CA B	CO C	GA D	OH E
Under \$1,000	25%	30%	20%	27%	22%
\$1,001 to \$2,500	25%	22%	30%	24%	22%
\$2,501 to \$5,000	19%	17%	17%	18%	26%
\$5,001 to \$10,000	15%	21%	11%	13%	14%
Over \$10,000	16%	10%	21%	18%	16%
<b>Median</b>	<b>\$2,730</b>	<b>\$2,170</b>	<b>\$2,750</b>	<b>\$2,500</b>	<b>\$3,000</b>

Monthly Maintenance Costs	Total	CA B	CO C	GA D	OH E
Under \$1,000	39%	42%	34%	41%	38%
\$1,001 to \$2,500	23%	26% <sup>D</sup>	29% <sup>D</sup>	13%	26% <sup>D</sup>
\$2,501 to \$5,000	19%	17%	17%	24%	18%
\$5,001 to \$10,000	5%	6%	6%	4%	5%
Over \$10,000	13%	9%	14%	18%	12%
<b>Median</b>	<b>\$2,000</b>	<b>\$1,780</b>	<b>\$2,000</b>	<b>\$2,000</b>	<b>\$2,000</b>

Shading indicates a significant difference at the 90% confidence level

Q31 – On average, how much do you spend each month on fueling the vehicles in your company's fleet?

Q32 – On average, how much do you spend each month on maintenance for the vehicles in your company's fleet?

BASE: TOTAL (n=293 Total/n=72 CA/n=70 CO/n=78 GA/n=73 OH)



# Remaining Concerns with Fleet Electrification

Cost analysis and financial implications (38%) are the top concerns, followed by charging infrastructure (18%) and vehicle range/suitability (14%). Logistics, maintenance/service, program transparency, and incentives also remain important considerations for businesses

Needs to Address	Total	CA	CO	GA	OH
<b>NET: Cost Analysis/Financial Implications</b>	<b>38%</b>	<b>35%</b>	<b>43%</b>	<b>33%</b>	<b>41%</b>
Cost (General)	22%	18%	26%	21%	25%
Return on investment/cost-benefit	9%	10%	10%	6%	10%
Purchase price	5%	4%	9%	3%	5%
Operating cost	4%	6%	6%	1%	3%
Consumption of electricity	2%		1%	5%	1%
<b>NET: Charging Infrastructure</b>	<b>18%</b>	<b>21%</b>	<b>23%</b>	<b>18%</b>	<b>12%</b>
Charging (General)	12%	10%	12%	15%	10%
Availability of charging	3%	6%	1%	1%	3%
Installation of charging	3%	4%	6%		1%
Location of the chargers	2%	1%	4%	3%	1%
<b>NET: Vehicle Range and Suitability</b>	<b>14%</b>	<b>13%</b>	<b>20%</b>	<b>8%</b>	<b>18%</b>
Vehicle range	5%	6%	7%	5%	1%
Vehicle selection/ acquisition	5%	7%	6%	1%	5%
Enough power/towing	4%	4%	6%		5%
Charging time/efficiency	2%		1%	1%	5%
Battery life	1%	1%	1%		3%
<b>Logistics of switching to an electric fleet</b>	<b>10%</b>	<b>10%</b>	<b>10%</b>	<b>9%</b>	<b>10%</b>
<b>NET: Maintenance and Service</b>	<b>7%</b>	<b>8%</b>	<b>6%</b>	<b>9%</b>	<b>5%</b>
Maintenance of the vehicles	5%	7%	4%	8%	3%
Reliability of the vehicles	2%	4%		1%	3%
<b>Program information/transparency</b>	<b>7%</b>	<b>6%</b>	<b>7%</b>	<b>9%</b>	<b>7%</b>
<b>Ease of implementation and turnaround time</b>	<b>4%</b>	<b>7%</b>	<b>3%</b>	<b>3%</b>	<b>4%</b>
<b>Incentives/Tax Benefits</b>	<b>4%</b>	<b>8%</b>	<b>3%</b>	<b>1%</b>	<b>3%</b>
<b>Dont know</b>	<b>3%</b>	<b>6%</b>	<b>3%</b>	<b>3%</b>	<b>1%</b>
<b>Nothing</b>	<b>10%</b>	<b>11%</b>	<b>4%</b>	<b>12%</b>	<b>11%</b>

Q23 – Based on this description, what needs to be addressed in that program to consider electrifying your company’s fleet?

BASE: TOTAL (n=293 Total/n=72 CA/n=70 CO/n=78 GA/n=73 OH)



# Firmographics



# Screening Questions



Below is a snapshot of who completed the Fleet Manager Survey

Most participants are in the delivery or construction business with over five Class 2b to Class 6 vehicles

S3 – Which of the following best describes your business?	Total	CA	CO	GA	OH
Home Services	24%	40%	23%	22%	12%
Delivery and logistic	42%	42%	40%	51%	36%
Disaster and restoration services	14%	24%	7%	9%	15%
Construction/General Contracting	44%	50%	47%	37%	44%
Landscaping	14%	17%	16%	6%	16%

S4 – How many commercial trucks or vans does your company own or lease?	Total	CA	CO	GA	OH
3 to 10	47%	35%	56%	51%	47%
11 to 20	28%	28%	19%	24%	42%
21 to 50	18%	24%	19%	21%	8%
More than 50	7%	14%	7%	4%	3%

S5 – How many are Class 2b to Class 6 vehicles?	Total	CA	CO	GA	OH
3	13%	8%	16%	15%	11%
4	14%	10%	16%	9%	23%
5+	73%	82%	69%	76%	66%
Mean	11	13	12	12	10

S6 – What is the average daily range of these vehicles?	Total	CA	CO	GA	OH
Less than 50 miles	8%	8%	7%	4%	14%
50 to 99 miles	26%	31%	26%	26%	22%
100 to 149 miles	36%	29%	37%	42%	34%
More than 150 miles	30%	32%	30%	28%	30%

S7 – How many electric commercial trucks or vans does your company own or lease?	Total	CA	CO	GA	OH
0	42%	26%	50%	47%	45%
At Least 1	58%	74%	50%	53%	55%
1	7%	7%	6%	9%	7%
2	14%	15%	11%	14%	16%
3	6%	8%	6%	5%	7%
4	3%	6%	1%	1%	5%
5	9%	13%	3%	13%	7%
6+	17%	25%	23%	10%	12%



# Firmographics

F4 – Do you own or lease the location(s) for which you are responsible for the energy management decisions?	Total	CA	CO	GA	OH
Own	<b>68%</b>	61%	67%	65%	78%
Lease	<b>27%</b>	35%	26%	28%	18%
Unsure	<b>5%</b>	4%	7%	6%	4%

F5 – What is your business’s annual gross revenue?	Total	CA	CO	GA	OH
Less than \$500,000	<b>6%</b>	3%	7%	5%	11%
\$500,000 to less than \$1 million	<b>13%</b>	17%	7%	14%	15%
\$1 million to less than \$5 million	<b>28%</b>	24%	29%	36%	22%
\$5 million to less than \$15 million	<b>24%</b>	25%	34%	18%	21%
\$15 million to less than \$50 million	<b>12%</b>	15%	11%	9%	14%
\$50 million to less than \$100 million	<b>10%</b>	11%	4%	12%	11%
\$100 million or more	<b>4%</b>	1%	4%	5%	5%

F6 – How many full-time employees does your company have at the location(s) for which you are responsible for the vehicle fleet?	Total	CA	CO	GA	OH
1-10	<b>18%</b>	22%	23%	10%	16%
11-50	<b>43%</b>	35%	33%	53%	52%
51-100	<b>15%</b>	17%	13%	15%	14%
101-500	<b>19%</b>	19%	23%	18%	15%
501+	<b>5%</b>	7%	9%	4%	3%

F7 – Across all states, how many locations does your company have?	Total	CA	CO	GA	OH
1	<b>46%</b>	38%	54%	38%	56%
2	<b>21%</b>	19%	16%	24%	23%
3	<b>9%</b>	10%	10%	12%	5%
4	<b>2%</b>	6%	1%	1%	1%
5-10	<b>12%</b>	15%	11%	13%	10%
11+	<b>9%</b>	13%	7%	12%	4%

F8 – What is your job title?	Total	CA	CO	GA	OH
Supervisor/Manager	<b>34%</b>	26%	34%	37%	40%
Founder/Owner	<b>17%</b>	15%	20%	14%	19%
C Level Exec/President	<b>12%</b>	22%	14%	6%	8%
Fleet Manager	<b>11%</b>	7%	13%	13%	10%
Director	<b>10%</b>	11%	6%	14%	10%
Contractor	<b>3%</b>	1%	3%	1%	5%
Vice President	<b>2%</b>	3%	1%	4%	1%
Other	<b>10%</b>	14%	9%	10%	7%

F9 – May we please have your age?	Total	CA	CO	GA	OH
18-24	<b>5%</b>	4%	1%	13%	-
25-34	<b>29%</b>	43%	21%	29%	22%
35-44	<b>39%</b>	33%	47%	35%	41%
45-54	<b>20%</b>	14%	20%	19%	26%
55-64	<b>6%</b>	3%	10%	3%	8%
65+	<b>2%</b>	3%	-	1%	3%