

## **From early adopters to mass market: is the French population ready for electric mobility?**

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### **Summary**

France has actively supported electromobility through political incentives and a dynamic industrial fabric. In that context, Avere-France and its partner Mobivia Group have conducted for the third time since 2012 a survey, carried out by IPSOS, on the French's mobility behaviours and their opinion on electric cars. It aims at determining whether the French population is mature enough to shift in the era of electromobility. The report highlights that they are better informed, and more prone to buy an electric vehicle to complete their daily needs and act in favour of the environment, despite the persistence of few prejudices.

*Keywords: demand, EV (electric vehicle), incentive, mass market*

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## **1 Introduction**

### **1.1 Presentation of Avere-France**

Avere-France is a professional association founded in 1978. It is a member of the AVERE European network. As a centre of information and expertise, it gathers and represents more than 140 entities, such as vehicle and equipment manufacturers, research centres, consultancies, municipalities, urban mobility services or professional users of electric vehicles.

Its main objective is to promote the use of battery, plug-in hybrid and fuel cell electric vehicles - individually and in fleets and for priority uses – in order to achieve greener mobility for cities and countries.

The main activities to achieve these objectives are related to lobbying, communication, networking, monitoring, and participation in French sustainable transports policy making.

Its main activities regard:

- Communication and promotion of electric mobility
- Lobbying towards national and local public authorities
- Creation of synergies in the French electromobility sector

- Workshops and meetings on specific topics (such as subsidies on vehicles, interoperability, access to private and public charging points, batteries improvement...)
- Cooperate with AVERE
- Organize and implement actions to promote its members Thanks to its expertise, Avere-France has been a strong partner of French policy makers for years. For example it has worked on the energy transition law and on the transposition of the European directive on alternative fuels in the country.

## **1.2 Context and objectives**

France is one of the most active markets for electric cars in Europe. Electric cars registrations have increased by +26% in 2016 to reach 27,307 units and are still growing in 2017. In March 2017, France has even breached the 100,000 new generation BEVs threshold, a European record only shared with Norway.

The government steadily encourages the development of electric mobility through several subsidies on both the purchase of an electric car – which can go up to 10,000 € – and the installation of public and private charging points.

In addition, the ecological transition law voted in 2015 has given local authorities not only tools to incentivize low emission vehicles, such as creating low emission zones (LEZ), but also obligations regarding their own car fleet. The ministry of Environment has also created a 6-class sticker, called Crit'Air, that distinguish all cars according to their level of NOx and other types of emissions. One of them is exclusively dedicated to BEVs and FCVs.

In that positive framework, Avere-France and its partner, Mobivia, have ordered a survey in order to capture how the French perceive electric mobility. This study is the third edition of an operation launched for the first time in 2012. It consists of both barometrical elements and new inputs about the relations between the French and electric cars. The aim is to determine whether the market growth and the political support had an impact on the French's willingness to buy an electric car.

The results have been presented at the occasion of 2016's European mobility week and reactivated during the Paris Motor Show of October 2016.

## **1.3 Methodology**

The survey was conducted by IPSOS, a well-known institute in the global research industry, in August 2016. A representative sample of 1,000 French was contacted to reply to an online 20-question survey. Since it was its third edition, some of the items have not been changed so as to question the evolution of the French perception of electric cars.

# **2 Mobility habits and an environmental awareness favourable to electric mobility**

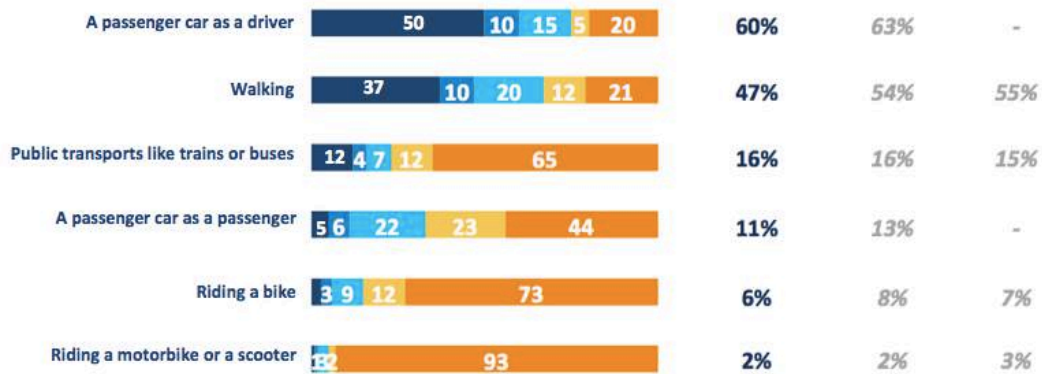
## **2.1 Mobility behaviours**

The survey focuses first on the French's mobility behaviours. The sample was asked how often they use different kinds of transportation. It is beyond dispute that cars are still the most popular option: 60% of respondents use it at least 4 times a week as a driver and 11% as a passenger. It should be noticed that this result has not changed much compared to two years ago. Further behind were quoted public transports (16% use them at least 4 times a week) and bicycles (6%).

## Driving remains very popular

Base: to all

■ Everyday or almost   
 ■ 4 to 5 times a week   
 ■ 1 to 3 times a week  
■ 2 to 3 times a month   
 ■ Not often or never



4 Could you tell how often you use the following transportation?

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Such data can bring food-for-thoughts to policy makers in the way they highlight that cars firmly dominate the French's daily mobility. From an environmental perspective, it raises two opportunities to improve their impact: fight against solo car use through shared mobility, and support the use of greener cars. Alternative fuel models like BEVs are therefore likely to be more promoted in the future.

In that respect, the daily distance realised by the French shows that they are perfectly compatible to electric cars for most of their needs. 77% of daily trips are below 50 km and the average is slightly above 30 km, which is 10% of the range of a Renault ZOE ZE 40. Having said that, the market share of electric models in the monthly new cars registrations is only around 1%. It shows most French ignore an EV can suit the majority of their needs.

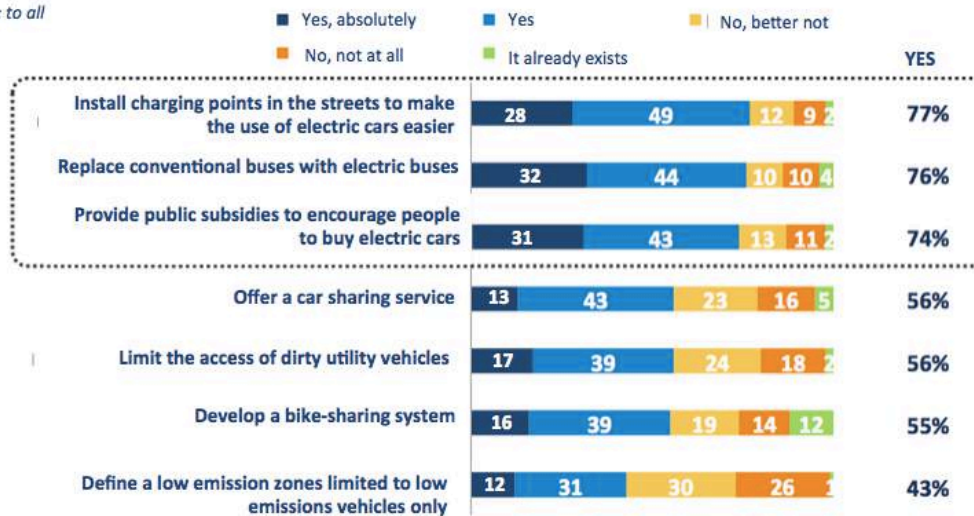
## 2.2 Making concessions for ecological purposes

The French's daily mobility habits are not to remain the same in the future. When asked whether they are ready to change their mobility behaviours to fight against local pollution, 80% of them replied yes. Such an answer should be taken carefully as it doesn't have direct consequences on their life, but still, it shows the French are willing to try alternatives to improve their quality of life. COP21, the Energy transition law (2015) and the pollution peaks that occurred in Paris and some other regions have probably contributed to raise concern in the society.

To understand more about their expectations, the survey focuses then on the solutions the sample would like public local authorities to implement. They were asked to pick 3 options out of 7. The ones that are directly connected to electric mobility were the most quoted answers: installing public charging points (picked by 77% of respondents), converting conventional buses to electric (76%) and providing subsidies on buying an EV (74%). Even enforcing a low emission zone is supported by at least 40% of them, though the policy is rather expected to be unpopular.

## The French support the deployment of electric mobility services in their city

Base: to all



8 Would you like your city to:

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### 3 The French are still prejudiced but more inclined to electric cars

#### 3.1. A positive image

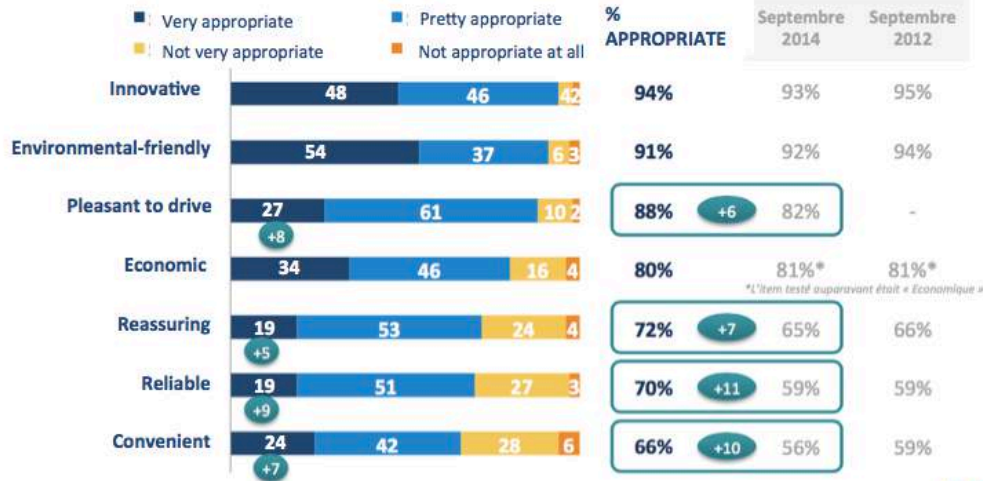
So far, the survey has highlighted 2 facts: the French are willing to adopt new mobility behaviours and their daily needs are compatible with electric cars. The potential of a bigger adoption of EVs is also strengthened by a very positive image of electric cars.

The respondents consider electric cars to be first of all innovative (94% of the respondents) and environmental-friendly (91%). Such qualities were already noticeable from the results of the 2014 survey, but since then, the perception has evolved. All the features connected to the use itself of the vehicle are indeed more positively assessed. For instance, the options “fun to drive” (88%), “reliable” (70%) and “convenient” (66%) are much more often quoted than before.

It shows that electric cars are no longer perceived as a mere eco-friendly object but now as a genuine and accessible solution. It also reveals that a larger number of French have probably driven an EV compared to the time of the previous poll, which will be confirmed later on.

## The image of the electric car is very positive and has improved on its features connected to its use

Base: to all



For each of the following adjectives, do you reckon it is appropriate to the idea you have of an electric car

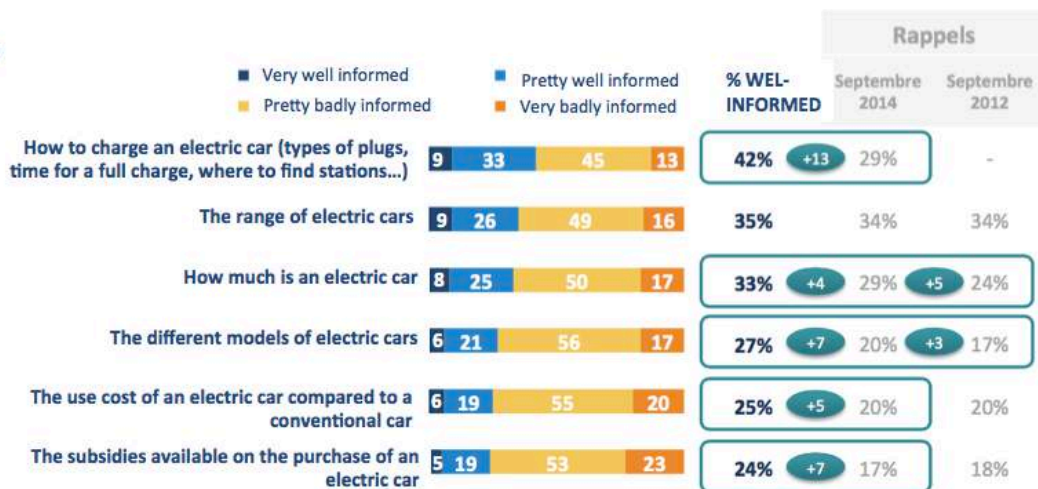
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This improved perception of electric cars is also very much linked to a better understanding of how EVs work. 2014's survey had indeed underlined the French's impression of lacking information about EVs. Efforts to explain how to charge an electric car seem to have paid off, as the proportion of interviewees who consider being well informed on that matter has jumped by 13 points to reach 42% of the respondents.

More than a half of the respondents have not changed its mind though. Outreach campaigns need to target questions like use costs and public subsidies as only 1 French out of 4 thinks to have enough information on those issues.

## The feeling of being well informed on electric cars increases

Base: to all



Do you have the feeling of being informed enough on...

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Pedagogy appears to be, through these results, a serious driver to make the transition from early adopters, who are naturally curious about new technology, to the mass market. Most people would expect the public authorities and companies to explain them what they should know about EVs, without making the first step.

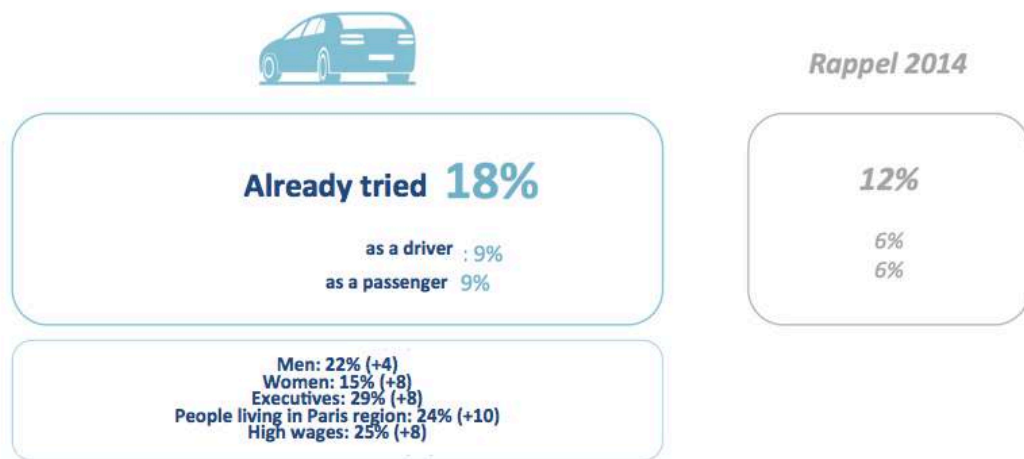
### 3.2. More and more people willing to buy an electric car

As shown before, the French are more aware of the benefits of driving electric. This idea is confirmed by the higher rate of positive answers to the question “have you already tried an electric car?” 18% of the respondents replied they did, which is 6 points more than in 2014.

However not all the French are equal: 29% of executives and 25% of people with high revenues have already tried an EV, which is far above average. It could mean that the idea of trying an electric car is directly connected to the perspective of buying one, which would explain why wealthy people are overrepresented. Such a result could change as second-hand vehicles reach the market.

#### More and more French have already tried an EV whatever category they belong to

Base: to all



14 Have you already tried an electric car?

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On the other hand, trying an electric car has direct consequences on their decision of buying one. While 35% of the respondents said they would be ready to go electric, the proportion is even higher among those who have already experienced EVs, as it reaches 55%. Compared to 2014, the French seem to be more mature towards this decision, as they used to be only 28% to be ready to buy an EV.

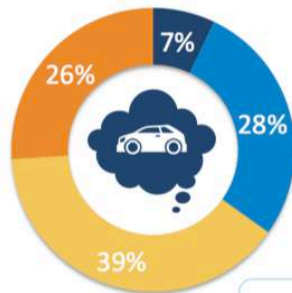
This surge can be accounted for by a better image of the EV as a car itself and a willingness to change their habits for the environment, as explained before, but also by the fact that public charging stations are more and more visible. Those who can potentially charge an EV are indeed more than 50% to be ready to buy an EV.

Here again the survey shows that electric cars are more popular among executives and higher social classes. This fact does not represent a surprise, as this category is more prone to buy a new car than the rest of the population.

## Intentions of buying an EV increases, especially among those who have already tried one and who know they can recharge it

Base: to all

■ Yes absolutely ■ Yes ■ No, rather not ■ No, not at all



**YES**  
**35%**

Executives: 48% (+10)  
High wages: 42% (+13)

Among those who have already tried an EV: 55% (+16)  
Among those who know they can charge: 54% (+12)



sept.-12 sept.-14 sept.-16

20 If you had to buy a car in the coming months, would you be ready to buy an EV rather than a conventional car ?

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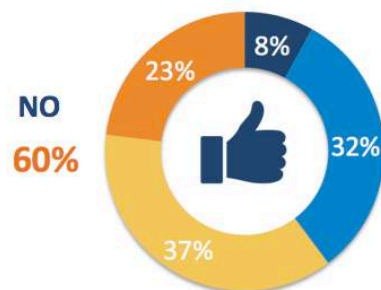
### 3.3. The obstacles on the way to a mass market

Although the daily distance made by the French is totally adequate to the range of an EV, people usually have a different understanding of their needs. The respondents of this survey made no exception as only 40% reckon EVs can match with their mobility habits. This rate is unchanged compared to the previous poll editions. More positive answers have to be noticed among those who have already tried an EV (51%) and those who can recharge it (57%).

## Electric cars correspond to the demand for mobility of 2 French out of 5

Base: to all

■ Yes absolutely ■ Yes ■ No, rather not ■ No, not at all



**NO**  
**60%**

**YES**  
**40%**

Executives: 50% (=)  
Among the most graduated: 46% (-5)  
Among those who have already tried an EV: 51% (+2)  
Among those who know they can charge: 57% (+6)



Only 40% (-2) of those who drive less than 50km/a day think an EV can correspond to their needs

Rappels % Oui	
Septembre 2014	Septembre 2012
41%	44%

16 Do you think an electric car can correspond to your daily personal demand for mobility?

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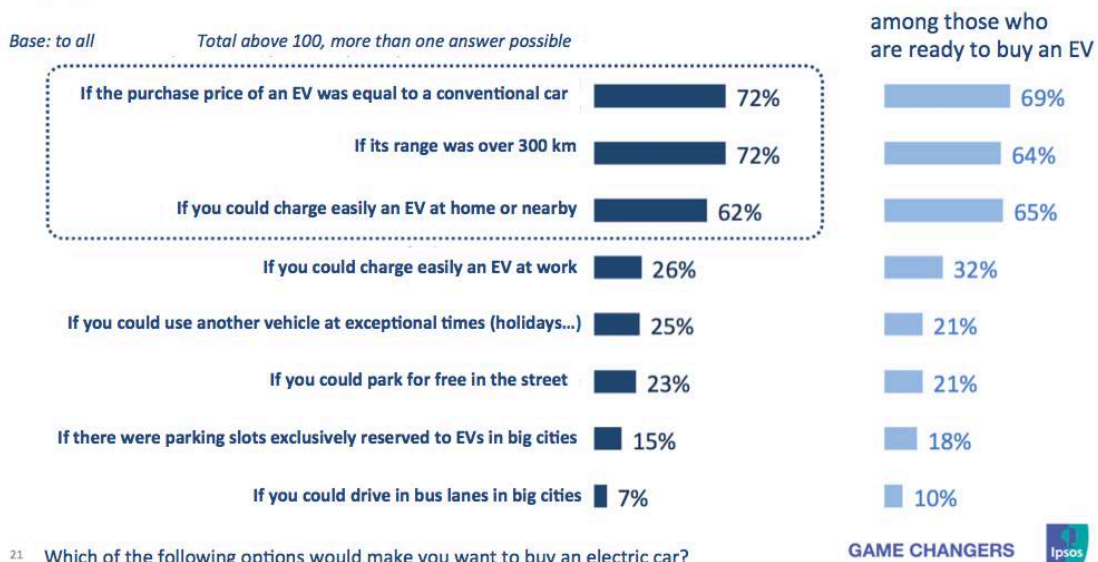


This result overall underlines people still struggle to rethink their mobility. They tend to overestimate their needs and usually ignore alternatives to the use of their personal car if they are going for long distances (for instance, Nissan France offers 30% of rebate on tickets to take one's LEAF away to its destination by the train).

This impression should indeed be put into perspective with the French's feeling of lacking information on EVs. In that framework, the sample still pointed out limited range (picked by 58% of the respondents) and the price (45%) to be the main hindrances to their decision to buy an electric car. When asked about how many kilometres of range an EV should have, they put the psychological barrier around 300 km.

As the new Renault ZOE and the Opel Ampera-e seem to correspond to their needs, the next edition of the survey will certainly determine whether range is still an issue. As for now, the French have identified three priorities that could make them buy an EV. "An equivalent purchase cost to a conventional car" is the most quoted answer (picked by 72% of the respondents) on the same level as "if the car range were over 300 km", but the proportion goes down to 64% for the latter among people who are ready to buy an EV. In third position, the respondents have picked by 62% the answer "if they could charge their EV directly at home or nearby", which is way more than the option regarding charging at work.

### Purchase costs, range and charge are the main priorities to encourage the French buying an electric car



## 4 Conclusion and perspectives

According to the survey, the French are more and more inclined to electric cars: the image of EVs has improved and spread in the society, charging is not as much of an issue as before... This has to be connected to the evolution of the context, which, through events and legislation, has raised concern about environmental issues. The French declare to be willing to change their old mobility habits, even though they still have some prejudices against electric cars. They tend to overestimate the range they need, which is ten times more than the distance they actually drive a day.

It is due to change: the actual range of EVs seems to correspond not only to their actual demand but also to their expectations. They could even be overachieved since car manufacturers have already announced new

models with a 500 km range. It might therefore lead to postponing their decision of buying, as it shows electric car is a fast-changing technology.

In that context, this highlights how important explaining electric mobility is. The survey shows improvements on practical aspects (i.e. how to charge the car) but the feeling of lacking information still persists about the costs of EVs.

Price may become the first obstacle on the way to mass market. It depends on whether the new government will extend the current program of financial incentives, as promised by Emmanuel Macron. The coming second-hand vehicles will also be part of the answer to lower the purchase costs of EVs.

The EV ecosystem has not answered all the French's questions yet. The interest people demonstrate towards electric cars after they have tried one proves tests and awareness campaigns are the best tools to carry the French on the road of electric mobility.

## Authors



Antoine Dusart, 29 years old, has been the Communication Manager of Avere-France since 2014. He is specialized in the political and juridical aspects of electromobility and coordinates a task force with 30 local authorities in France.



Marie Castelli, 32 years old, is the General Secretary of Avere-France since 2013. She is considered as one of the French electromobility sector experts in France. Before that, she was a consultant in a public affairs consultancy where she was specialised in energy issues.