

## IAG EV Whitepaper Report 2026

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This disclosure statement complies with the Australian Polling Council Code of Conduct.\*

| Short Methodology Disclosure Statement |                                                 |                                                                                                                   |
|----------------------------------------|-------------------------------------------------|-------------------------------------------------------------------------------------------------------------------|
| F1a.                                   | Research company conducting the research        | Ipsos                                                                                                             |
| F1b.                                   | Client commissioning the research               | This study was commissioned by IAG.                                                                               |
| F1c.                                   | Name of end client                              | IAG                                                                                                               |
| F1d.                                   | Fieldwork dates                                 | 19/05/2026 – 26/05/2026                                                                                           |
| F1e.                                   | Data collection methodology and (F1f.) split    | Online (100%)                                                                                                     |
| F1g.                                   | Target population                               | Australian adults aged 18+                                                                                        |
| F1h.                                   | Sample size                                     | n=2000                                                                                                            |
| F1i.                                   | Compliant with Australian Polling Council Code. | Yes                                                                                                               |
| F1j.                                   | URL for Long Methodology Disclosure Statement   | <a href="https://www.ipsos.com/en-au/disclosure_statements">https://www.ipsos.com/en-au/disclosure_statements</a> |
| F1k.                                   | Voting intention published                      | No                                                                                                                |
| F1l.                                   | Allocation of undecided voters                  | -                                                                                                                 |

| Long Methodology Disclosure Statement     |                                                                          |                                                                                                                                                                                                                                                                                                                                                                                       |
|-------------------------------------------|--------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| F2a.                                      | Effective sample size after weighting                                    | Total effective sample size = 1780.47                                                                                                                                                                                                                                                                                                                                                 |
| F2b.                                      | Error margin associated with the effective sample size for the research. | Credibility Interval is +/- 2.32%<br>For information on the Ipsos use of credibility intervals, visit:<br><a href="https://www.ipsos.com/sites/default/files/ct/publication/documents/2021-03/credibility_intervals_for_online_polling_-_2021.pdf">https://www.ipsos.com/sites/default/files/ct/publication/documents/2021-03/credibility_intervals_for_online_polling_-_2021.pdf</a> |
| F2c.                                      | Variables used for weighting, population data source                     | Targets calculated using the 2021 ABS Census figures used for age, sex, location.                                                                                                                                                                                                                                                                                                     |
| F2d.                                      | Weighting methodology used                                               | Rim weighting                                                                                                                                                                                                                                                                                                                                                                         |
| F2e.                                      | Full question text                                                       | See below                                                                                                                                                                                                                                                                                                                                                                             |
| F2f.                                      | **Prior questions which may have materially influenced results           | None                                                                                                                                                                                                                                                                                                                                                                                  |
| F2g.                                      | **Proportion of completed phone interviews by type                       | Not applicable                                                                                                                                                                                                                                                                                                                                                                        |
| F2h.                                      | **Source of online sample used.                                          | Respondents selected from existing panels of people agreeing to take part in surveys.                                                                                                                                                                                                                                                                                                 |
| <b>**If voting intention is published</b> |                                                                          |                                                                                                                                                                                                                                                                                                                                                                                       |
| G2b.                                      | Ability to provide 'undecided' response                                  | No                                                                                                                                                                                                                                                                                                                                                                                    |
| G2c.                                      | Do voting intention figures exclude 'undecided'                          | Not applicable                                                                                                                                                                                                                                                                                                                                                                        |
| G2e.                                      | Method of calculating 2PP                                                | Not applicable                                                                                                                                                                                                                                                                                                                                                                        |

\*Relevant clauses of the Code of Conduct are noted for each item

\*\*This item may not be applicable

The Australian Polling Council Code of Conduct can be found [here](#).

**Full question text**

**SECTION S – SCREENING**

**SQ1 YEAR/MONTH.** What is your date of birth?

**YEAR**

- ☐ \_1910 1910  
☐ ...  
☐ \_2015 2015

**MONTH**

- ☐ \_1 January  
☐ \_2 February  
☐ \_3 March  
☐ \_4 April  
☐ \_5 May  
☐ \_6 June  
☐ \_7 July  
☐ \_8 August  
☐ \_9 September  
☐ \_10 October  
☐ \_11 November  
☐ \_12 December

**RECRUIT TO QUOTA | SET QUOTAS AGE | TERMINATE IF YOUNGER THAN 18YO**

| AGE               |   | TARGET    |
|-------------------|---|-----------|
| Under 18 years    |   | TERMINATE |
| 18 to 24 years    | 1 | 221       |
| 25 to 34 years    | 2 | 371       |
| 35 to 44 years    | 3 | 351       |
| 45 to 54 years    | 4 | 325       |
| 55 to 64 years    | 5 | 301       |
| 65 years and over | 6 | 430       |
|                   |   | n=2000    |

**RESP\_AGE.**

**Hidden Question - RESP\_AGE** "this is a dummy question that will hold age"

**PROGRAM TO RECODE AUTOMATICALLY {CHECK QUOTA} | IF UNDER 18 TERMINATE**

**SQ2 RESP\_GENDER\_NONBINARY.** What is your gender?

- ☐ \_1 Male  
☐ \_2 Female  
☐ \_3 Another gender  
☐ \_4 Prefer not to answer

**RESP=GENDERV1** Help question only, do not show respondents – allocate as per RESP\_GENDER. If code 3 or 4, randomly allocate to code 1 or 2

1. Male
2. Female

#### RECRUIT TO QUOTA | SET QUOTAS GENDER |

| GENDER |   | TARGET |
|--------|---|--------|
| Male   | 1 | 982    |
| Female | 2 | 1018   |
|        |   | n=2000 |

**COUNTRY10 (HIDDEN) – AUTOCODE 4: AUSTRALIA**  
**POSTCODE\_AU | CORTEX | {Open Ended Numeric Input only}**

**SQ3 PostCode\_AU.** Please insert your residential/home postal code?

*Please type in your response below.*

**4 DIGIT RESPONSE ONLY.**

**City. REQUIRED.** Please select the city you are living in?

**SQ4 Hidden Recode AUSSTDRegion from PostCode, City and State.**

**RECODE FROM POSTCODE TO CORRESPONDENDING REGION**

#### RECRUIT TO QUOTA | SET QUOTAS REGION |

| REGION                       |    | TARGET |
|------------------------------|----|--------|
| Greater Sydney               | 1  | 410    |
| Rest of New South Wales      | 2  | 221    |
| Australian Capital Territory | 3  | 35     |
| Greater Melbourne            | 4  | 389    |
| Rest of Victoria             | 5  | 124    |
| Greater Hobart               | 6  | 20     |
| Rest of Tasmania             | 7  | 25     |
| Greater Brisbane             | 8  | 197    |
| Rest of Queensland           | 9  | 206    |
| Greater Adelaide             | 10 | 111    |
| Rest of South Adelaide       | 11 | 32     |
| Greater Perth                | 12 | 169    |
| Rest of Western Australia    | 13 | 43     |
| Greater Darwin               | 14 | 11     |
| Rest of Northern Territory   | 15 | 7      |
|                              |    | n=2000 |

**Hidden Recode ARIA\_Remoteness from PostCode.**

**RECODE FROM POSTCODE TO CORRESPONDENDING REGION (REFER SUPPLIED LIST)**

**SQ5 ARIA Remoteness**

|                         |   |
|-------------------------|---|
| Metro                   | 1 |
| Inner Regional          | 2 |
| Outer Regional / Remote | 3 |

-----[NEW SCREEN]-----

**FOR THOSE WHO ARE TERMINATED IN PREVIOUS SCREENER QUESTIONS**
**Termination script:**

Thank you for agreeing to take part in the survey. Unfortunately, you are not one of the people we are looking for in this survey.

[REDIRECT TO PANEL WEBSITE]

**MAIN QUESTIONNAIRE**
**PART A – Vehicle ownership and intention**
**ASK ALL**
**A1 | Vehicle ownership | {SINGLE}**

Do you currently own a motor vehicle?

|     |   |
|-----|---|
| Yes | 1 |
| No  | 2 |

**ASK ALL**
**D1 | New Vehicle\_familiarity | {SINGLE per row} | {REVERSE FOR 50%} | #ABH4 | #INQ1**

How familiar are you with the types of vehicles below? *Please select one answer per row*

|   | ROTATE CAR TYPES                                            | Never heard of | Heard about but know nothing | Know just a little about | Know a fair amount | Know a great deal about |
|---|-------------------------------------------------------------|----------------|------------------------------|--------------------------|--------------------|-------------------------|
| 1 | Battery electric vehicle                                    | 1              | 2                            | 3                        | 4                  | 5                       |
| 2 | Hybrid vehicle (mix of fuel and electric)                   | 1              | 2                            | 3                        | 4                  | 5                       |
| 3 | Petrol or diesel vehicle with an internal combustion engine | 1              | 2                            | 3                        | 4                  | 5                       |

**ASK ALL**
**A3 | Intender | {SINGLE}**

**IF A1=2 SHOW** When, if at all, do you think you will buy a vehicle? *Please select one answer*

**SHOW FOR ALL OTHERS** When, if at all, do you think you will buy your next vehicle? *Please select one answer*

|                                       |   |
|---------------------------------------|---|
| In the next 12 months                 | 1 |
| In the next 1 to 2 years              | 2 |
| In the next 2 to 3 years              | 3 |
| In the next 3 to 5 years              | 4 |
| In more than 5 years' time            | 5 |
| Not sure                              | 6 |
| I do not intend to purchase a vehicle | 7 |

**ASK IF INTENDERS (IF A3=1-4)**

**A4 | New or Used | {SINGLE}**

For your next vehicle purchase, are you considering buying a new or used/demo vehicle?

By 'new' we mean a vehicle purchased brand new from a dealership

By 'used' we mean a pre-owned or second hand vehicle or demonstrator vehicle bought from a dealership or a private sale

|                |   |
|----------------|---|
| A new vehicle  | 1 |
| A used vehicle | 2 |
| Not sure       | 3 |

**ASK IF A4 = 2 (CONSIDERING USED VEHICLE, EITHER, OR NOT SURE)**

**A4a | New or Used | {SINGLE}**

You mentioned you are considering a used or pre-owned vehicle. How open would you be to purchasing a used battery electric vehicle?

Please select one answer

|                                                               |   |
|---------------------------------------------------------------|---|
| Very open, it would be one of my first considerations         | 1 |
| Somewhat open, I would consider it alongside other options    | 2 |
| Not very open, I would prefer a used petrol or hybrid vehicle | 3 |
| Not open at all, I would not consider a used electric vehicle | 4 |
| Not Sure                                                      | 5 |

**ASK IF SELECTED CODE 1 AT A1 (OWNERS)**

**A5 | VEHICLE OWNERSHIP | {SINGLE} | {REVERSE ORDER FOR 50%} | #ABB3a | #INS10**

Thinking about the vehicle you own, what type of vehicle is it?

*If you own multiple cars respond with most recent purchase in mind. Please select one answer*

|                                   |   |
|-----------------------------------|---|
| Petrol                            | 1 |
| Diesel                            | 2 |
| Battery Electric                  | 3 |
| Hybrid (mix of fuel and electric) | 4 |

**ASK IF INTENDERS (IF A3=1-4)**

**A6 | VEHICLE TYPE INTENTION | {MULTIPLE} |**

**{REVERSE ORDER FOR 50%} | #ABB4c**

What type of vehicle are you considering purchasing as your next car?

*Please select all that apply*

|                                   |   |
|-----------------------------------|---|
| Petrol                            | 1 |
| Diesel                            | 2 |
| Battery Electric                  | 3 |
| Hybrid (mix of fuel and electric) | 4 |
| Not sure {EXCLUSIVE}              | 5 |

**A7 | ELECTRIC CONSIDERATION | {SINGLE PER ROW} | REVERSE ORDER FOR 50%**

Will you consider the following vehicle types in your purchase?

*Please select one answer for each row*

|   |                                                                  | Will not<br>consider at all | Will<br>consider a<br>little bit | Will<br>consider a<br>lot |
|---|------------------------------------------------------------------|-----------------------------|----------------------------------|---------------------------|
| 1 | Battery Electric <b>ASK IF CODE NOT 3 AT A6</b>                  | 1                           | 2                                | 3                         |
| 2 | Hybrid (mix of fuel and electric) <b>ASK IF CODE NOT 4 AT A6</b> | 1                           | 2                                | 3                         |

**ASK IF CODE 1 AT A7\_1**

**A8 | ELECTRIC REJECTION | {MULTIPLE} | RANDOMISE | #ABB4e**

You said that you will not consider a battery electric vehicle for your next purchase. Why do you say that?

*Please select any that apply.*

|                                                                |    |
|----------------------------------------------------------------|----|
| Battery life (i.e., how many years the battery will be useful) | 1  |
| Charging time                                                  | 2  |
| Lack of public charging stations                               | 3  |
| Driving range                                                  | 4  |
| Affordability                                                  | 5  |
| Inability to charge at home                                    | 6  |
| Higher overall cost of ownership                               | 7  |
| Safety                                                         | 8  |
| Unproven reliability                                           | 9  |
| Lack of familiarity / knowledge about EVs                      | 10 |
| Lack of mechanics who can service EVs                          | 11 |
| Performance relative to petrol/ diesel powered vehicles        | 12 |
| Availability / dealer inventory                                | 13 |
| Towing capacity                                                | 14 |
| Load carrying capacity (boot/storage space)                    | 15 |
| Unattractive styling                                           | 16 |
| Social acceptability                                           | 17 |
| Lack of engine / exhaust noise                                 | 18 |
| Risk of battery fires                                          | 19 |
| Other (please specify) <b>{ANCHOR}</b>                         | 97 |
| None of the above <b>{EXCLUSIVE / ANCHOR}</b>                  | 98 |

**PART B – MOTIVATORS AND BARIERS TO PURCHASE**

**B1 | Drivers for Electric Vehicle purchase/consideration | {MULTIPLE} | #ABB4d**

**SHOW IF SELECTED CODE 3 AT A5** Which factors led you to purchase an electric vehicle?

*Please select all applicable answers*

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**SHOW IF SELECTED CODE 3 AT A6 EXCLUDE CODE 3 AT A5 (ELECTRIC VEHICLE BUYERS)** Which factors have led you to consider purchasing a battery electric vehicle?

*Please select all applicable answers*

|                                                |    |
|------------------------------------------------|----|
| Environmental sustainability concerns          | 1  |
| Lifestyle enhancement                          | 2  |
| Passionate about electric vehicle technology   | 3  |
| Driving assistance and autonomous car features | 4  |
| Reducing my carbon footprint                   | 5  |
| More public charging available                 | 6  |
| Improved driving range                         | 7  |
| Less maintenance than a petrol or diesel car   | 8  |
| Cheaper to run than petrol/diesel cars         | 9  |
| Ability to recharge at home or work            | 10 |
| Ability to use renewable energy to recharge    | 11 |
| Save fuel resources                            | 13 |
| Government subsidies on purchase               | 15 |
| Unreliable fuel supply                         | 16 |
| Other {ANCHOR}                                 | 97 |

### ASK ALL

**B3 | EV\_importance | {MULTIPLE} | ROTATE STATEMENTS | #INQ3XX**

If you were to purchase a battery electric vehicle tomorrow, which attributes would be most important to you?

*Please select all that apply.*

|                                              |    |
|----------------------------------------------|----|
| Price                                        | 1  |
| Driving range                                | 2  |
| Charging speed                               | 3  |
| Access to a nationwide fast charging network | 4  |
| Efficiency/ Low running cost                 | 5  |
| Government subsidies and incentives          | 6  |
| Advanced technology                          | 7  |
| Advanced driver assist system technologies   | 8  |
| Reputable car manufacturer                   | 9  |
| Safety                                       | 10 |
| Attractive styling                           | 11 |
| Other {ANCHOR}                               | 97 |

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## PART C – FINANCE AND INSURANCE

### SHOW IF A3 = 1-4 (INTENDERS)

#### C2 | Vehicle budget intenders | {SINGLE} | #ABF1bi

What budget are you currently planning to have for your next vehicle purchase? *Please select one answer*

|                     |    |
|---------------------|----|
| Less than \$15,000  | 1  |
| \$15,000 - \$19,999 | 2  |
| \$20,000 - \$29,999 | 3  |
| \$30,000 - \$39,999 | 4  |
| \$40,000 - \$49,999 | 5  |
| \$50,000 - \$59,999 | 6  |
| \$60,000 - \$69,999 | 7  |
| \$70,000 - \$79,999 | 8  |
| \$80,000 - \$89,999 | 9  |
| \$90,000 +          | 10 |
| Prefer not to say   | 97 |

### ASK IF CODE 3 AT A6 (ELECTRIC VEHICLE INTENDERS)

#### C3 | EV willingness to spend more | {SINGLE}

What is the most you are willing to spend on a battery electric vehicle?

|                     |    |
|---------------------|----|
| Less than \$15,000  | 1  |
| \$15,000 - \$19,999 | 2  |
| \$20,000 - \$29,999 | 3  |
| \$30,000 - \$39,999 | 4  |
| \$40,000 - \$49,999 | 5  |
| \$50,000 - \$59,999 | 6  |
| \$60,000 - \$69,999 | 7  |
| \$70,000 - \$79,999 | 8  |
| \$80,000 - \$89,999 | 9  |
| \$90,000 +          | 10 |
| Prefer not to say   | 97 |

### SHOW IF A1=1 (CAR OWNERS)

#### C4 | When think about insurance | {SINGLE} | #ABF1C

When did you start thinking about insurance when it came to your vehicle purchase, if at all? *Please select one answer*

|                                                                                                |   |
|------------------------------------------------------------------------------------------------|---|
| <b>From the beginning</b> , when I was thinking about what I need and things I should consider | 1 |
| <b>When I had a rough idea</b> of what was out there and narrowing down my choices             | 2 |
| <b>When I had a short list of vehicles</b> I was evaluating / comparing                        | 3 |

|                                                                                |   |
|--------------------------------------------------------------------------------|---|
| <b>When I knew exactly which vehicle I wanted</b> and was getting ready to buy | 4 |
| <b>After I made my purchase</b>                                                | 5 |

**ASK IF SELECTED CODE 3 AT A5 (ELECTRIC VEHICLE BUYERS) OR CODE 3 AT A6 (ELECTRIC VEHICLE INTENDERS)**

## PART D – FUTURE INTENTION

### ASK ALL

**D2 | New vehicle likelihood to purchase future | {SINGLE PER ROW} | {REVERSE FOR 50%} | #ABH5**

How likely are you to purchase each type of vehicle in the future? *Please select one answer per row*

|   |                                                             | <b>Very unlikely</b> | <b>Somewhat unlikely</b> | <b>Neither likely nor unlikely</b> | <b>Somewhat likely</b> | <b>Very likely</b> |
|---|-------------------------------------------------------------|----------------------|--------------------------|------------------------------------|------------------------|--------------------|
|   | <b>ROTATE CAR TYPES</b>                                     |                      |                          |                                    |                        |                    |
| 1 | Battery electric vehicle                                    | 1                    | 2                        | 3                                  | 4                      | 5                  |
| 2 | Hybrid vehicle (mix of fuel and electric)                   | 1                    | 2                        | 3                                  | 4                      | 5                  |
| 3 | Petrol or diesel vehicle with an internal combustion engine | 1                    | 2                        | 3                                  | 4                      | 5                  |

**ASK IF CODE 4 OR 5 SELECTED AT D2\_1 OR 2 (ELECTRIC/HYBRID VEHICLE)**

**D3 | Electric intention | {SINGLE}**

When do you think you will buy a {INSERT RESPONSE FROM D2\_1}? *Please select one answer*

|                            |   |
|----------------------------|---|
| In the next 12 months      | 1 |
| In the next 1 to 2 years   | 2 |
| In the next 2 to 3 years   | 3 |
| In the next 4 to 5 years   | 4 |
| In the next 5 to 10 years  | 5 |
| In more than 10 years time | 6 |
| Not sure                   | 7 |

**ASK IF CODE 4 OR 5 SELECTED AT D2\_1 OR 2 (ELECTRIC/HYBRID VEHICLE)**

**D4 | likelihood to purchase NEW | {SINGLE PER ROW} | {REVERSE FOR 50%}**

Would you ever consider purchasing a used or second hand electric or hybrid vehicle?

|   | <b>ROTATE CAR TYPES<br/>ONLY SHOW 1 OR 2 BASED ON<br/>RESPONSE AT D2_1 OR 2</b> | <b>Would only ever purchase new</b> | <b>Would consider purchasing used or second hand</b> | <b>Would only ever purchase used or second hand</b> |
|---|---------------------------------------------------------------------------------|-------------------------------------|------------------------------------------------------|-----------------------------------------------------|
| 1 | Battery electric vehicle                                                        | 1                                   | 2                                                    | 3                                                   |
| 2 | Hybrid vehicle (mix of fuel and electric)                                       | 1                                   | 2                                                    | 3                                                   |

**ASK IF CODE 4 OR 5 SELECTED AT D2\_1 OR 2 (ELECTRIC/HYBRID VEHICLE)**

**D5 | Likelihood to import 2<sup>nd</sup> hand EV | {MULTIPLE}**

Would you ever consider purchasing an imported used or second-hand electric vehicle if the price and vehicle type met your needs? *Please select all that apply*

|                                                                            |   |
|----------------------------------------------------------------------------|---|
| Yes, I would import an electric vehicle from another country to own        | 1 |
| Yes, I would purchase an imported vehicle if it was already in the country | 2 |
| No, I would not purchase an imported vehicle {EXCLUSIVE}                   | 3 |

**ASK IF SELECTED CODE 1 OR 2 FOR D4\_1**

**D6 | What would need to change to seriously consider 2<sup>nd</sup> hand EV | {SINGLE PER ROW} | {REVERSE FOR 50%}**

What would need to change in order for you to seriously consider purchasing a used or second-hand battery electric vehicle? *Please provide as much detail as possible*

{OPEN ENDED TEXT RESPONSE}

**ASK IF CODE 4 OR 5 SELECTED AT D2\_1 (ELECTRIC VEHICLE)**

**D8 | Electric consideration | {MULTIPLE} | {RANDOMISE} | #INQ3XX**

Why are you likely to consider purchasing a battery electric vehicle in the future? *Please select up to 5 responses*

|                                                         |    |
|---------------------------------------------------------|----|
| Less pollution                                          | 1  |
| Save fuel resources (oil/petrol)                        | 2  |
| Helps reduce carbon footprint                           | 3  |
| Ability to recharge at home                             | 4  |
| Cost of electricity is lower than cost of petrol/diesel | 5  |
| Can use renewable energy                                | 6  |
| Uses more advanced technology                           | 7  |
| No need to go to a petrol station                       | 8  |
| Less maintenance                                        | 9  |
| Government subsidies for purchasing                     | 10 |
| I like them                                             | 11 |
| More likely to use sustainable materials                | 12 |
| Performance relative to petrol/diesel powered vehicles  | 13 |
| Attractive styling                                      | 14 |
| Can recharge at work                                    | 15 |
| Ability to work like a generator/store energy           | 16 |
| Concern about unreliable fuel supply                    | 17 |
| Other (please specify) {ANCHOR}                         | 97 |
| None of the above {EXCLUSIVE} {ANCHOR}                  | 98 |

**ASK IF SELECTED A8 = 4 (DRIVING RANGE)**

**D10 | EV\_range | {SINGLE} | #INQ23**

What is the minimum distance you would need a battery electric vehicle to travel on a single charge before you would consider purchasing it?

|                        |   |
|------------------------|---|
| 200 kilometres or less | 1 |
| 201 - 300 kilometres   | 2 |

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|                        |   |
|------------------------|---|
| 301 – 400 kilometres   | 3 |
| 401 – 500 kilometres   | 4 |
| 501 – 600 kilometres   | 5 |
| 601 – 700 kilometres   | 6 |
| 701 kilometres or more | 7 |

### ASK IF SELECTED CODE 1 or 2 AT A7\_1 (UNLIKELY TO PURCHASE)

#### D11| EV infrastructure | {SINGLE} | RANDOMISE

What type of infrastructure would need to be in place before you would consider purchasing a battery electric vehicle? *Please select all that apply.*

|                                                                          |   |
|--------------------------------------------------------------------------|---|
| Access to charging facilities at my work                                 | 1 |
| Public charging stations in by local council area                        | 2 |
| Fast charging facilities on all major highways every 50 kms              | 3 |
| Electric charging capabilities at petrol stations                        | 4 |
| Public charging stations featuring multiple chargers                     | 5 |
| Access to free charging at major shopping centres / public carparks etc  | 6 |
| Public charging stations at visitor attractions and accommodation venues | 7 |
| Other (please specify) {ANCHOR}                                          | 8 |
| None of the above would change my consideration of EVs {ANCHOR}          | 9 |

### ASK ALL

#### D12| EV battery testing | {SINGLE} | ROTATE RESPONSE ORDER FOR 50%

If you could check your battery health easily and affordably through a trusted source, how likely would this make you to seriously consider purchasing an electric vehicle in the future?

|                      |   |
|----------------------|---|
| No change            | 1 |
| A little more likely | 2 |
| A lot more likely    | 3 |

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**ASK IF CODE 1-3 SELECTED AT D2\_1 (ELECTRIC VEHICLE)**
**D14 | Electric\_likelihood to purchase future\_what will change mind | {MULTIPLE} | RANDOMISE | #INQ18 | #INQ37**

After reviewing all the statements below, please select the changes that would make the most difference to your likelihood to buy an electric vehicle (EV).

Select up to 5.

|                                                                |    |
|----------------------------------------------------------------|----|
| Ability to charge EVs at your home                             | 1  |
| Lower cost of electricity                                      | 2  |
| Increased petrol/diesel prices                                 | 3  |
| Government subsidies when purchasing an EV                     | 4  |
| Installation of solar panels on your house or apartment block  | 5  |
| Ability to charge EVs at your workplace                        | 6  |
| More attractive styling                                        | 7  |
| A ban on sale of new fossil fuel vehicles in Australia         | 8  |
| Increase in driving range                                      | 9  |
| More public EV chargers in your local area                     | 10 |
| More public EV chargers on motorways or in rural areas         | 12 |
| Availability of cheaper electric vehicle models                | 13 |
| Increased towing capacity for EVs                              | 15 |
| Increased EV load carrying capacity (i.e., boot/storage space) | 16 |
| Better information about how to purchase an EV                 | 17 |
| None of the above {ANCHOR}                                     | 97 |

**PART E – EV OWNER ATTITUDES**
**ASK IF SELECTED CODE 3 AT A5 (ELECTRIC VEHICLE BUYERS)**
**E1 | Most important activity to promote Electric Vehicle sales | {MULTI} | ROTATE STATEMENTS | #ABB4f**

Which, if any, of the following do you think would encourage Australians to buy an electric vehicle for their next vehicle purchase? Please select up to three responses

|                                                                                                                                |    |
|--------------------------------------------------------------------------------------------------------------------------------|----|
| Offer financial viability model calculator showing savings on petrol/diesel and breakeven of vehicle costs                     | 1  |
| Government incentives with lower taxes, benefits for end users if they have electric vehicles                                  | 2  |
| Government incentives to vehicle manufacturers to reduce electric vehicle prices                                               | 3  |
| Establish adequate electric vehicle charging infrastructure in each community and Local Government Area                        | 4  |
| Community awareness through government funded integrated communication campaign involving all major newspapers and TV channels | 5  |
| A ban on the importation of fossil fuel vehicles into Australia                                                                | 6  |
| Address insurance related issues for electric vehicles                                                                         | 7  |
| Other specify {ANCHOR}                                                                                                         | 97 |
| None of the above {ANCHOR} {EXCLUSIVE}                                                                                         | 98 |

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**FOR ROWS 1-8 ASK ALL**

**FOR ROWS 9-11 ASK IF SELECTED CODE 3 AT A5 (ELECTRIC VEHICLE BUYERS)**

**E2 | General BEV owner attitudes | {SINGLE} | REVERSE RESPONSE ORDER FOR 50% | #INQ31B**

To what extent to do you agree with the following statements about battery electric vehicles (BEV)?

*Please select one answer per row*

|    | <b>ROTATE STATEMENTS<br/>SHOW AS A PROGRESSIVE GRID</b>                                                                                                                                               | <b>Strongly<br/>agree</b> | <b>Somewha<br/>t agree</b> | <b>Neither<br/>agree nor<br/>disagree</b> | <b>Somewhat<br/>disagree</b> | <b>Strongly<br/>disagree</b> | <b>Do<br/>n't<br/>kno<br/>w</b> |
|----|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------|----------------------------|-------------------------------------------|------------------------------|------------------------------|---------------------------------|
| 1  | It will take a long time for BEVs to become mainstream <b>(ASK ALL)</b>                                                                                                                               | 1                         | 2                          | 3                                         | 4                            | 5                            | 6                               |
| 2  | BEVs should include all the latest high-tech features that are available <b>(ASK ALL)</b>                                                                                                             | 1                         | 2                          | 3                                         | 4                            | 5                            | 6                               |
| 3  | I regularly check the battery health of my electric vehicle <b>(ASK IF SELECTED CODE 3 AT A5)</b>                                                                                                     | 1                         | 2                          | 3                                         | 4                            | 5                            | 6                               |
| 4  | BEVs should look more modern and futuristic than traditional vehicles <b>(ASK ALL)</b>                                                                                                                | 1                         | 2                          | 3                                         | 4                            | 5                            | 6                               |
| 5  | Considering their whole lifecycle, including production, operation and disposal, battery electric vehicles are no better for the environment than traditional petrol/diesel vehicles <b>(ASK ALL)</b> | 1                         | 2                          | 3                                         | 4                            | 5                            | 6                               |
| 6  | The overall cost of buying and running a battery electric vehicle is less than for a traditional petrol/diesel vehicle <b>(ASK ALL)</b>                                                               | 1                         | 2                          | 3                                         | 4                            | 5                            | 6                               |
| 7  | Battery electric vehicles can do everything a traditional petrol/diesel vehicle can do <b>(ASK ALL)</b>                                                                                               | 1                         | 2                          | 3                                         | 4                            | 5                            | 6                               |
| 8  | Next time I buy a car, it will definitely be a battery electric vehicle <b>(ASK IF SELECTED CODE 3 AT A5)</b>                                                                                         | 1                         | 2                          | 3                                         | 4                            | 5                            | 6                               |
| 9  | I expect it to be able to sell my battery electric vehicle with a strong resale value <b>(ASK IF SELECTED CODE 3 AT A5)</b>                                                                           | 1                         | 2                          | 3                                         | 4                            | 5                            | 6                               |
| 10 | I would use an annual service that tests the health of my vehicle's battery <b>(ASK IF SELECTED CODE 3 AT A5)</b>                                                                                     | 1                         | 2                          | 3                                         | 4                            | 5                            | 6                               |
| 12 | There are some things I don't like about my battery electric vehicle <b>(ASK IF SELECTED CODE 3 AT A5)</b>                                                                                            | 1                         | 2                          | 3                                         | 4                            | 5                            | 6                               |
| 11 | I am concerned there is a lack of trained mechanics who can service or repair                                                                                                                         | 1                         | 2                          | 3                                         | 4                            | 5                            | 6                               |

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|        |                                                                               |   |   |   |   |   |   |
|--------|-------------------------------------------------------------------------------|---|---|---|---|---|---|
|        | electric vehicles in my area ( <b>ASK IF<br/>SELECTED CODE 3 AT A5</b> )      |   |   |   |   |   |   |
| 1<br>2 | I am concerned about the reliability and<br>cost of petrol/diesel fuel supply | 1 | 2 | 3 | 4 | 5 | 6 |
| 1<br>3 | It would be easy for my household to<br>install home EV charging              | 1 | 2 | 3 | 4 | 5 | 6 |

**ASK IF SELECTED CODE 1 OR 2 FOR E2\_12**
**E3 | What don't like about EV | {SINGLE PER ROW} | {REVERSE FOR 50%}**

You mentioned there are some things you don't like about your battery electric vehicle. Please provide as much detail as possible about what you don't like.

|                            |
|----------------------------|
| {OPEN ENDED TEXT RESPONSE} |
|----------------------------|

**PART F – AUTO EXPERT / INFLUENCER / GENERAL EV ATTITUDES**
**ASK ALL**
**F1 | Auto knowledge | {SINGLE} | REVERSE RESPONSE ORDER FOR 50% | #ABC1**

Using the below scale, how knowledgeable would you say you are about cars/vehicles in general? *Please select one answer*

| I know almost<br>nothing about<br>cars/vehicles | I know a little about<br>cars/vehicles | I have a reasonable<br>knowledge about<br>cars/vehicles | I have a good level<br>of knowledge about<br>cars/vehicles | I have an advanced<br>knowledge about<br>cars/vehicles |
|-------------------------------------------------|----------------------------------------|---------------------------------------------------------|------------------------------------------------------------|--------------------------------------------------------|
| 1                                               | 2                                      | 3                                                       | 4                                                          | 5                                                      |

**ASK ALL**
**F2 | Auto interest | {SINGLE} | REVERSE RESPONSE ORDER FOR 50% | #ABC2**

How interested would you say you are about cars/vehicles in general? *Please select one answer*

| Not at all interested | Just a little bit<br>interested | Somewhat<br>interested | Very interested |
|-----------------------|---------------------------------|------------------------|-----------------|
| 1                     | 2                               | 3                      | 4               |

**ASK ALL**
**F4 | ELECTIC AWARENESS | {MULTIPLE} | RANDOMISE | #INQ17**

Thinking about battery electric vehicles (BEVs), which of the following have you done in the last 12 months)? *Please select all that apply.*

|                                           |    |
|-------------------------------------------|----|
| Noticed BEVs on the road                  | 1  |
| Seen advertising for a BEV                | 2  |
| Seen BEV charging stations                | 3  |
| Seen news coverage about BEVs             | 4  |
| Talked about BEVs with someone I know     | 5  |
| Know someone who has bought a BEV         | 6  |
| Ridden in a BEV as a passenger            | 7  |
| Visited a dealership and asked about BEVs | 9  |
| Driven a BEV                              | 10 |

## Long Methodology Disclosure Statement

|                                                               |    |
|---------------------------------------------------------------|----|
| Attended an event/location where BEVs were promoted/displayed | 11 |
| Purchased a BEV                                               | 12 |
| None of these <b>{ANCHOR} {EXCLUSIVE}</b>                     | 13 |

### ASK ALL

#### F5 | TRUSTED VOICE | {SINGLE PER ROW} | REVERSE RESPONSE ORDER FOR 50%

To what extent do you trust advice on battery electric vehicles from each of the following organisations or people?  
*Please select one response per row.*

|    | <b>RANDOMISE<br/>SHOW AS A PROGRESSIVE GRID</b> | Distrust a great deal | Distrust a little | Neutral | Trust a little | Trust a great deal |
|----|-------------------------------------------------|-----------------------|-------------------|---------|----------------|--------------------|
| 1  | The current Australian government               | 1                     | 2                 | 3       | 4              | 5                  |
| 2  | Your local state or territory government        | 1                     | 2                 | 3       | 4              | 5                  |
| 3  | Car dealerships                                 | 1                     | 2                 | 3       | 4              | 5                  |
| 4  | Banking/financial sector                        | 1                     | 2                 | 3       | 4              | 5                  |
| 5  | Petrol stations                                 | 1                     | 2                 | 3       | 4              | 5                  |
| 6  | Car manufacturers                               | 1                     | 2                 | 3       | 4              | 5                  |
| 7  | Electricity utility suppliers                   | 1                     | 2                 | 3       | 4              | 5                  |
| 8  | Motoring associations (e.g., NRMA or RAC)       | 1                     | 2                 | 3       | 4              | 5                  |
| 9  | Mechanics                                       | 1                     | 2                 | 3       | 4              | 5                  |
| 10 | The media                                       | 1                     | 2                 | 3       | 4              | 5                  |
| 11 | General insurance companies                     | 1                     | 2                 | 3       | 4              | 5                  |

### ASK ALL

#### F6 | GENERAL EV ATTITUDES | {SINGLE PER ROW} | {REVERSE RESPONSE ORDER FOR 50%}

How much do you agree or disagree with the following statements? *Please select one response per row.*

|   | <b>RANDOMISE<br/>SHOW AS A PROGRESSIVE GRID</b>                                                          | Strongly disagree | Somewhat disagree | Neither agree nor disagree | Somewhat agree | Strongly agree |
|---|----------------------------------------------------------------------------------------------------------|-------------------|-------------------|----------------------------|----------------|----------------|
| 1 | Electric vehicles have different servicing requirements than traditional petrol/diesel vehicles          | 1                 | 2                 | 3                          | 4              | 5              |
| 2 | Electric vehicles have different maintenance requirements than traditional petrol/diesel vehicles        | 1                 | 2                 | 3                          | 4              | 5              |
| 3 | It costs less to service and maintain an electric vehicle compared to traditional petrol/diesel vehicles | 1                 | 2                 | 3                          | 4              | 5              |
| 4 | Electric vehicles are not suitable for the Australian climate and weather conditions                     | 1                 | 2                 | 3                          | 4              | 5              |
| 5 | Electric vehicles are just as durable as traditional petrol/diesel vehicles                              | 1                 | 2                 | 3                          | 4              | 5              |

## Long Methodology Disclosure Statement

|    |                                                                                                                      |   |   |   |   |   |
|----|----------------------------------------------------------------------------------------------------------------------|---|---|---|---|---|
| 6  | I am concerned electric vehicles are more likely to catch fire than petrol/diesel vehicles                           | 1 | 2 | 3 | 4 | 5 |
| 7  | I do not believe an electric vehicle can meet my every day driving needs                                             | 1 | 2 | 3 | 4 | 5 |
| 8  | I am interested in learning more about electric vehicles                                                             | 1 | 2 | 3 | 4 | 5 |
| 9  | I am worried about the safety of charging electric vehicles                                                          | 1 | 2 | 3 | 4 | 5 |
| 10 | I am worried about how electric vehicle batteries will be recycled and disposed of once they reach their end of life | 1 | 2 | 3 | 4 | 5 |
| 11 | Insurance companies should do more to reward EV drivers including reducing the cost of insuring electric vehicles    | 1 | 2 | 3 | 4 | 5 |
| 12 | There should be a way to monitor and test the battery life and health of electric vehicles                           | 1 | 2 | 3 | 4 | 5 |
| 13 | I have confidence in the quality of the electric vehicles entering Australia by new manufacturers                    | 1 | 2 | 3 | 4 | 5 |
| 14 | Electric vehicles offer protection from future oil price rises.                                                      | 1 | 2 | 3 | 4 | 5 |
| 15 | Fuel instability makes EVs feel like a better long-term option than petrol/diesel vehicles                           | 1 | 2 | 3 | 4 | 5 |

### ASK ALL

#### F7 | Battery recycling | {SINGLE PER ROW} | {REVERSE RESPONSE ORDER FOR 50%}

How much do you agree or disagree with the following statements?

|   | <b>RANDOMISE<br/>SHOW AS A PROGRESSIVE GRID</b>                                                               | <b>Strongly<br/>disagree</b> | <b>Somewhat<br/>disagree</b> | <b>Neither<br/>agree<br/>nor<br/>disagree</b> | <b>Somewhat<br/>agree</b> | <b>Strongly<br/>agree</b> |
|---|---------------------------------------------------------------------------------------------------------------|------------------------------|------------------------------|-----------------------------------------------|---------------------------|---------------------------|
| 1 | I'm confident that EV batteries can be reused and recycled                                                    | 1                            | 2                            | 3                                             | 4                         | 5                         |
| 2 | I am concerned about the safety of recycled electric vehicle batteries                                        | 1                            | 2                            | 3                                             | 4                         | 5                         |
| 3 | I would be willing to use a recycled electric vehicle battery                                                 | 1                            | 2                            | 3                                             | 4                         | 5                         |
| 4 | I am worried about where all the expired electric vehicle batteries will go once they reach their end of life | 1                            | 2                            | 3                                             | 4                         | 5                         |

### ASK ALL

#### F8 | preferences | {SINGLE PER ROW} | {REVERSE RESPONSE COLUMN ORDER FOR 50%}

Which of the following vehicle types do you believe ....? *Please select one response per row*

## Long Methodology Disclosure Statement

|    | <b>RANDOMISE<br/>SHOW AS A PROGRESSIVE GRID</b> | <b>Battery<br/>electric<br/>vehicles</b> | <b>Hybrid<br/>vehicles</b> | <b>Petrol/<br/>diesel<br/>vehicles</b> |
|----|-------------------------------------------------|------------------------------------------|----------------------------|----------------------------------------|
| 1  | Offers the best value for money                 | 1                                        | 2                          | 3                                      |
| 2  | Has the best safety features                    | 1                                        | 2                          | 3                                      |
| 3  | Is the most environmentally friendly            | 1                                        | 2                          | 3                                      |
| 4  | Is the most cost effective to run               | 1                                        | 2                          | 3                                      |
| 5  | Is the fastest                                  | 1                                        | 2                          | 3                                      |
| 6  | Is the most exciting                            | 1                                        | 2                          | 3                                      |
| 7  | Is safest to own                                | 1                                        | 2                          | 3                                      |
| 8  | Will be most common in 5 years' time            | 1                                        | 2                          | 3                                      |
| 9  | Is the easiest to sell                          | 1                                        | 2                          | 3                                      |
| 10 | Is best to drive in all weather conditions      | 1                                        | 2                          | 3                                      |

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## PART G – GOVERNMENT

### ASK ALL

#### G1 | EV strategy awareness | {SINGLE PER ROW} | {REVERSE RESPONSE ORDER FOR 50%}

In 2023, the Australian government announced its National Electric Vehicle (EV) strategy. The strategy was designed to offer greater EV affordability, access to charging stations, and reductions in emissions. It also includes government incentives with a focus on expanding the availability and options of electric vehicles for buyers to enable a rapid EV uptake in Australia.

How much, if anything, would you say you know about the National Vehicle Strategy?

|                              |   |
|------------------------------|---|
| Never heard of it            | 1 |
| Heard of, know nothing about | 2 |
| Just a little                | 3 |
| A fair amount                | 4 |
| A great deal                 | 5 |
| Don't know {ANCHOR}          | 6 |

### ASK ALL

#### G2 | Fuel excise understanding | {SINGLE} | {RANDOMISE}

Australia's fuel excise is a national sales tax imposed by the federal government. How do you believe this fuel excise tax is currently paid by Australians?

|                                                         |   |
|---------------------------------------------------------|---|
| Paid at the pump as part of the cost of petrol / diesel | 1 |
| As part of annual registration fee for vehicles         | 2 |
| As part of the insurance of vehicles                    | 3 |
| On toll roads or via congestion taxes                   | 4 |
| Other (please specify) {ANCHOR}                         | 5 |
| Not sure {ANCHOR}                                       | 6 |

### ASK ALL

#### G3 | Fuel excise awareness | {SINGLE}

Australia's fuel excise is a flat sales tax that is imposed by the federal government on petrol and diesel purchased at the pump. The current rate is 48.8 cents excise for every litre of fuel purchased. The fuel excise rate is adjusted in February and August each year in line with inflation and is in addition to the GST.

Before today, were you aware Australians pay this tax on petrol and diesel?

|                                                                           |   |
|---------------------------------------------------------------------------|---|
| Yes – I am aware of the tax and the amount of excise charged              | 1 |
| Yes – I am aware of the tax, but didn't know the amount of excise charged | 2 |
| No – I was not aware of this tax or excise charged                        | 3 |

### ASK ALL

#### G4 | Policies | {SINGLE PER ROW} | {REVERSE RESPONSE ORDER FOR 50%}

To what extent do you support or oppose the following initiatives?

## Long Methodology Disclosure Statement

|    | <b>RANDOMISE<br/>SHOW AS A PROGRESSIVE<br/>GRID</b>                                                                                                      | <b>Strongly<br/>support</b> | <b>Tend to<br/>support</b> | <b>No<br/>feelings<br/>either way</b> | <b>Tend to<br/>oppose</b> | <b>Strongly<br/>oppose</b> | <b>Don't<br/>Know<br/>{ANCHOR}</b> |
|----|----------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|----------------------------|---------------------------------------|---------------------------|----------------------------|------------------------------------|
| 1  | The import of second hand electric vehicles to grow affordable supply in Australia                                                                       | 1                           | 2                          | 3                                     | 4                         | 5                          | 6                                  |
| 2  | A target to reduce internal combustion engine sales in Australia (i.e., will reduce sales of petrol/diesel cars by 30% by 2035)                          | 1                           | 2                          | 3                                     | 4                         | 5                          | 6                                  |
| 3  | Ban of importation of internal combustion engine vehicles in Australia after a certain date (i.e., no more importation of petrol/diesel cars after 20XX) | 1                           | 2                          | 3                                     | 4                         | 5                          | 6                                  |
| 4  | Introduction of national fuel efficiency standards                                                                                                       | 1                           | 2                          | 3                                     | 4                         | 5                          | 6                                  |
| 5  | A national framework for road user charging to replace the fuel excise tax                                                                               | 1                           | 2                          | 3                                     | 4                         | 5                          | 6                                  |
| 6  | A national training package to upskill mechanics in servicing and repairing electric vehicles                                                            | 1                           | 2                          | 3                                     | 4                         | 5                          | 6                                  |
| 7  | A government campaign to encourage Australians to purchase electric vehicles                                                                             | 1                           | 2                          | 3                                     | 4                         | 5                          | 6                                  |
| 8  | Consumer education on how to safely charge and preserve battery life of electric vehicles                                                                | 1                           | 2                          | 3                                     | 4                         | 5                          | 6                                  |
| 9  | Establishment of a clear process for disposal, reuse and recycling of electric vehicle batteries                                                         | 1                           | 2                          | 3                                     | 4                         | 5                          | 6                                  |
| 9a | Establishment of a clear process for recycling and disposal of petrol and diesel vehicles as more electric vehicles are introduced in Australia          | 1                           | 2                          | 3                                     | 4                         | 5                          | 6                                  |

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## Long Methodology Disclosure Statement

|    |                                                                                                                                                |   |   |   |   |   |   |
|----|------------------------------------------------------------------------------------------------------------------------------------------------|---|---|---|---|---|---|
| 10 | National standards and regulations on the safe installation, operation and maintenance of electric charging infrastructure                     | 1 | 2 | 3 | 4 | 5 | 6 |
| 11 | Adjustments to the national written off vehicle register to include information on whether an electric vehicle battery was damaged or replaced | 1 | 2 | 3 | 4 | 5 | 6 |
| 12 | A public awareness campaign showcasing the benefits of switching to electric vehicles                                                          | 1 | 2 | 3 | 4 | 5 | 6 |
| 13 | Putting the transition to electric vehicles at the heart of Australia's net zero strategy                                                      | 1 | 2 | 3 | 4 | 5 | 6 |
| 14 | A government buy back of petrol and diesel vehicles to encourage the uptake of electric vehicles                                               | 1 | 2 | 3 | 4 | 5 | 6 |
| 15 | Government support to include electric vehicle charging infrastructure in strata properties                                                    | 1 | 3 | 3 | 4 | 5 | 6 |

### IF G4\_3 = 1

#### G5 | IMPORTATION BAN | {SINGLE}

When do you believe the ban of importation of internal combustion engine (petrol/diesel) vehicles should take effect in Australia? *Please select one answer*

|                                         |   |
|-----------------------------------------|---|
| No more importation after 2027          | 1 |
| No more importation after 2030          | 2 |
| No more importation after 2035          | 3 |
| No more importation after 2040          | 4 |
| No more importation after 2045          | 5 |
| No more importation after 2050 or later | 6 |

### ASK ALL

#### G6 | Fuel excise alternative | {SINGLE} | {RANDOMISE}

There are talks to consider changing the national framework for a road user charge to replace the fuel excise tax to make it fair for all Australians, including those who drive electric vehicles. Which of the following do you believe would be the best way to implement such a tax?

|                                                       |   |
|-------------------------------------------------------|---|
| Paid at the pump as part of the cost of petrol/diesel | 1 |
|-------------------------------------------------------|---|

## Long Methodology Disclosure Statement

|                                                   |   |
|---------------------------------------------------|---|
| During registration / re-registration of vehicles | 2 |
| As part of the insurance of vehicles              | 3 |
| On toll roads or via congestion taxes             | 4 |
| Based on kilometres driven                        | 5 |
| Other (please specify) {ANCHOR}                   | 6 |
| Not sure {ANCHOR}                                 | 7 |

### ASK ALL

#### G7 | EV tax | {SINGLE} | ROTATE ORDER FOR 50%

Currently, the funds from Australia's fuel excise tax is collected by the federal government and contributes to general revenue. Because electric vehicles don't use petrol or diesel fuels, they don't contribute to this tax. One of the proposed changes is that electric vehicles would pay a levy based on the distance they travel.

- Supporters of the road user levy on electric vehicles say that it will ensure electric vehicle owners pay their fair share
- Opponents say the levy will slow down the conversion to electric vehicles and cause more pollution

With this in mind, how much do you support or oppose a new proposal to levy a road user tax on electric vehicles?

|                        |   |
|------------------------|---|
| Strongly support       | 1 |
| Slightly support       | 2 |
| No feelings either way | 3 |
| Slightly oppose        | 4 |
| Strongly oppose        | 5 |
| Not sure {ANCHOR}      | 6 |

### ASK ALL

#### G8 | EV tax introduction | {SINGLE} | ROTATE ORDER FOR 50%

One way of incentivising the uptake of electric vehicles in Australia is to pause the implementation of a national road user charge for several years, or until the percentage of electric vehicles sold in Australia reaches a certain milestone. In 2025, 8.2% of all vehicles sold in Australia were EVs.

When do you believe a road user charge for battery electric vehicles should be introduced in Australia?

|                                                                        |    |
|------------------------------------------------------------------------|----|
| It should be introduced immediately                                    | 1  |
| When battery electric vehicle sales reach 10% of all cars sold         | 2  |
| When battery electric vehicle sales reach 20% of all cars sold         | 3  |
| When battery electric vehicle sales reach 30% of all cars sold         | 4  |
| When battery electric vehicle sales reach 40% of all cars sold         | 5  |
| When battery electric vehicle sales reach 50% of all cars sold         | 6  |
| When battery electric vehicle sales reach 60% of all cars sold         | 7  |
| When battery electric vehicle sales reach 70% of all cars sold         | 8  |
| When battery electric vehicle sales reach 80% or more of all cars sold | 9  |
| It shouldn't be introduced at all                                      | 10 |

### ASK ALL

#### G9 | LEADERSHIP IN EV | {SINGLE PER ROW} | {ROTATE RESPONSE OPTIONS}

## Long Methodology Disclosure Statement

Which organisation do you believe should take the lead on the following initiatives in the electric vehicle space?

*Please select one answer per row*

|   | <b>ROTATE STATEMENTS</b>                                                                             | <b>The Government</b> | <b>Car manufacturers</b> | <b>Car dealerships</b> | <b>Banking/<br/>Financial sector</b> | <b>General insurance companies</b> | <b>None of these</b> |
|---|------------------------------------------------------------------------------------------------------|-----------------------|--------------------------|------------------------|--------------------------------------|------------------------------------|----------------------|
| 1 | The sale and use of electric vehicles                                                                | 1                     | 2                        | 3                      | 4                                    | 5                                  | 6                    |
| 2 | Understand how electric vehicles are different to insure or repair than petrol/diesel vehicles       | 1                     | 2                        | 3                      | 4                                    | 5                                  | 6                    |
| 3 | Reducing the cost of insuring electric vehicles                                                      | 1                     | 2                        | 3                      | 4                                    | 5                                  | 6                    |
| 4 | Monitoring and testing the battery life and health for electric vehicles                             | 1                     | 2                        | 3                      | 4                                    | 5                                  | 6                    |
| 5 | Providing more changing stations                                                                     | 1                     | 2                        | 3                      | 4                                    | 5                                  | 6                    |
| 6 | Battery recycling and end-of-life recycling of electric vehicles                                     | 1                     | 2                        | 3                      | 4                                    | 5                                  | 6                    |
| 7 | Reducing the environmental and other impacts of electric vehicles throughout their product lifecycle | 1                     | 2                        | 3                      | 4                                    | 5                                  | 6                    |

## PART H – SUSTAINABILITY

### ASK ALL

#### H1| ENVIRONMENTAL VALUES | {SINGLE PER ROW} | {REVERSE RESPONSE ORDER FOR 50%}

How much do you agree or disagree with the following statements?

|   | <b>RANDOMISE<br/>SHOW AS A PROGRESSIVE GRID</b>                                                | <b>Strongly<br/>disagree</b> | <b>Somewhat<br/>disagree</b> | <b>Neither<br/>agree<br/>nor<br/>disagree</b> | <b>Somewhat<br/>agree</b> | <b>Strongly<br/>agree</b> |
|---|------------------------------------------------------------------------------------------------|------------------------------|------------------------------|-----------------------------------------------|---------------------------|---------------------------|
| 1 | I think about sustainability when choosing products/services                                   | 1                            | 2                            | 3                                             | 4                         | 5                         |
| 2 | I expect to pay more for sustainable products/services                                         | 1                            | 2                            | 3                                             | 4                         | 5                         |
| 3 | I am willing to pay more for sustainable products/services                                     | 1                            | 2                            | 3                                             | 4                         | 5                         |
| 4 | A company's environmental record is important in my purchasing decisions for products/services | 1                            | 2                            | 3                                             | 4                         | 5                         |
| 5 | The government should be doing more to support sustainability efforts among Australians        | 1                            | 2                            | 3                                             | 4                         | 5                         |
| 6 | Sustainability is important to me                                                              | 1                            | 2                            | 3                                             | 4                         | 5                         |
| 7 | Climate change is a serious threat to Australia                                                | 1                            | 2                            | 3                                             | 4                         | 5                         |

### ASK ALL

#### H2| ENVIRONMENTAL ISSUES | {SINGLE PER ROW} | {REVERSE RESPONSE ORDER FOR 50%} | #INQ16

How much do you agree or disagree with the following statements?

|   | <b>RANDOMISE<br/>SHOW AS A PROGRESSIVE GRID</b>                                                       | <b>Strongly<br/>disagree</b> | <b>Somewhat<br/>disagree</b> | <b>Neither<br/>agree<br/>nor<br/>disagree</b> | <b>Somewhat<br/>agree</b> | <b>Strongly<br/>agree</b> |
|---|-------------------------------------------------------------------------------------------------------|------------------------------|------------------------------|-----------------------------------------------|---------------------------|---------------------------|
| 1 | Reducing vehicle emissions is important to me                                                         | 1                            | 2                            | 3                                             | 4                         | 5                         |
| 2 | Most Australians will adopt electric vehicles in the next 5 years                                     | 1                            | 2                            | 3                                             | 4                         | 5                         |
| 3 | I am willing to pay a little extra for products such an electric vehicle for a cleaner environment    | 1                            | 2                            | 3                                             | 4                         | 5                         |
| 4 | I buy vehicles that reflect my commitment to the environment                                          | 1                            | 2                            | 3                                             | 4                         | 5                         |
| 5 | I am willing to give up convenience for environmentally friendly products                             | 1                            | 2                            | 3                                             | 4                         | 5                         |
| 6 | The introduction of more electric vehicles is a crucial step in reducing Australia's carbon emissions | 1                            | 2                            | 3                                             | 4                         | 5                         |

|  |  |  |  |  |  |  |
|--|--|--|--|--|--|--|
|  |  |  |  |  |  |  |
|--|--|--|--|--|--|--|

**ASK ALL**

**H4 | Product stewardship end of life | {SINGLE} | {ROTATE RESPONSE OPTIONS}**

**{IF RESPONDENT SELECTS LESS THAN SINGLE RESPONSE CAN WE INCLUDE AND RED REMINDER THAT IT'S "SELECT UP TO 3" ALLOW TO PROCEED IF NO CHANGE}**

Who do you think should be taking the lead in managing the social and environmental impacts of electric vehicles and their parts? *Please select up to three.*

|                                                     |    |
|-----------------------------------------------------|----|
| Manufacturer / producer                             | 1  |
| Brand owner / the brand responsible for production  | 2  |
| Federal government                                  | 3  |
| State or territory government                       | 4  |
| Retailer / the company selling it                   | 5  |
| Distributors / importers                            | 6  |
| Consumer / individuals                              | 7  |
| Waste management / recycling services and companies | 8  |
| Local council                                       | 9  |
| Repairers / mechanics                               | 10 |
| Second hand car dealers                             | 11 |
| Don't know / unsure {ANCHOR}                        | 12 |

**ASK ALL**

**H5 | Product stewardship end of life | {SINGLE} | {ROTATE RESPONSE OPTIONS}**

Who, if anybody, do you believe should have to pay for the cost of recycling and disposal of electric vehicles and their parts at the end of their life? *Please select up to three.*

|                                                     |    |
|-----------------------------------------------------|----|
| Manufacturer / producer                             | 1  |
| Brand owner / the brand responsible for production  | 2  |
| Federal government                                  | 3  |
| State or territory government                       | 4  |
| Retailer / the company selling it                   | 5  |
| Distributor / importer                              | 6  |
| Consumers (the general public)                      | 7  |
| Waste management / recycling services and companies | 8  |
| Local government                                    | 9  |
| Other (please specify) {ANCHOR}                     | 10 |
| Don't know / unsure {ANCHOR}                        | 11 |

**ASK ALL**

**H7 | EV confidence | {SINGLE} | REVERSE RESPONSE COLUMN ORDER FOR 50%**

How concerned are you about the following? *Please select one answer per row*

## Long Methodology Disclosure Statement

|   | <b>ROTATE<br/>SHOW AS PROGRESSIVE GRID</b>                                                                                                      | Very<br>concerned | Somewhat<br>concerned | Not very<br>concerned | Not at all<br>concerned | Not sure<br>{ANCHOR} |
|---|-------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|-----------------------|-----------------------|-------------------------|----------------------|
| 1 | The recycling and disposal of electric vehicle batteries once they reach their end of life                                                      | 1                 | 2                     | 3                     | 4                       | 5                    |
| 2 | The recycling and disposal of vehicles with internal combustion engines (petrol/diesel vehicles) with the increased uptake of electric vehicles | 1                 | 2                     | 3                     | 4                       | 5                    |

### PART I—GENERAL PROFILING

#### ASK ALL

##### I1 | Vehicles in HH | {SINGLE}

How many registered motor vehicles are owned or used by members of your household?

|           |   |
|-----------|---|
| None      | 1 |
| 1         | 2 |
| 2         | 3 |
| 3         | 4 |
| 4 or more | 5 |

##### IF A1=1 (CAR OWNERS)

##### I2| CURRENT DRIVING FREQUENCY | {SINGLE}

On average, how often is your vehicle driven by anyone in your household?

*If you own more than one vehicle, please think about the vehicle that is driven most often.*

|                                                       |    |
|-------------------------------------------------------|----|
| Every day                                             | 1  |
| 6 days a week                                         | 2  |
| 5 days a week                                         | 3  |
| 4 days a week                                         | 4  |
| 3 days a week                                         | 5  |
| 2 days a week                                         | 6  |
| Once a week                                           | 7  |
| Less than weekly, but at least once a month           | 8  |
| Less than once a month, but at least every six months | 9  |
| Less than every six months                            | 10 |

##### IF A1=1 (CAR OWNERS)

##### I3| CURRENT DRIVING RANGE | {SINGLE}

Approximately how many kilometres is your vehicle driven each day?

|                             |   |
|-----------------------------|---|
| Up to 10 kilometres per day | 1 |
|-----------------------------|---|

## Long Methodology Disclosure Statement

|                                |    |
|--------------------------------|----|
| 10 – 20 kilometres per day     | 2  |
| 21 – 30 kilometres per day     | 3  |
| 31 - 40 kilometres per day     | 4  |
| 41 - 50 kilometres per day     | 5  |
| 51 – 60 kilometres per day     | 6  |
| 61 – 70 kilometres per day     | 7  |
| 71 - 80 kilometres per day     | 8  |
| 80+ kilometres per day or more | 9  |
| I'm not sure                   | 10 |

### IF A1=1 (CAR OWNERS)

#### I4| CURRENT HABITS | {SINGLE PER ROW} | RANDOMISE | REVERSE RESPONSE ORDER FOR 50%

How often would you say you undertake the following activities with your vehicle? *Please select one answer per row*

|   | <b>RANDOMISE<br/>SHOW AS PROGRESSIVE GRID</b>           | Daily | Weekl<br>y | Monthly | Quarterly | Six<br>monthly | Annually<br>or less | I do not do<br>this activity<br>{ANCHOR} |
|---|---------------------------------------------------------|-------|------------|---------|-----------|----------------|---------------------|------------------------------------------|
| 1 | Towing                                                  | 1     | 2          | 3       | 4         | 5              | 6                   | 7                                        |
| 2 | Driving for errands                                     | 1     | 2          | 3       | 4         | 5              | 6                   | 7                                        |
| 3 | Regular commuting                                       | 1     | 2          | 3       | 4         | 5              | 6                   | 7                                        |
| 4 | Hauling / carrying large and or heavy loads             | 1     | 2          | 3       | 4         | 5              | 6                   | 7                                        |
| 5 | Medium distance driving (1.5 to 2.5 hours driving time) | 1     | 2          | 3       | 4         | 5              | 6                   | 7                                        |
| 6 | Long distance driving (3+ hours driving time)           | 1     | 2          | 3       | 4         | 5              | 6                   | 7                                        |
| 7 | Driving for work (apart from regular commuting)         | 1     | 2          | 3       | 4         | 5              | 6                   | 7                                        |

## PART J –DEMOGRAPHICS

### SHOW ALL

Just a few more questions to help us profile the people who participated in this survey.

### ASK ALL

#### J1 | Lifestage | {SINGLE}

Which of the following best describes your life-stage? *Please select one answer*

|                                 |   |
|---------------------------------|---|
| Single living alone             | 1 |
| Single living with other people | 2 |
| Couple no children              | 3 |

## Long Methodology Disclosure Statement

|                                                                           |   |
|---------------------------------------------------------------------------|---|
| Couple or single parent with mostly pre-school children ( $\leq 6$ years) | 4 |
| Couple or single parent with mostly school aged children                  | 5 |
| Couple or single parent with mostly older children ( $< 18$ years)        | 6 |
| Older couple or single parent with no children left at home               | 7 |
| Other                                                                     | 9 |

### ASK ALL

#### J2 | HH Income | {SINGLE}

What is your approximate **annual household income** before tax? Please take account of the salaries, bonuses, pensions, allowances etc. paid to all the members of the household. *Please select one answer*

|                       |    |
|-----------------------|----|
| Below \$30,000        | 1  |
| \$30,001 - \$40,000   | 2  |
| \$40,001 - \$50,000   | 3  |
| \$50,001 - \$60,000   | 4  |
| \$60,001 - \$80,000   | 5  |
| \$80,001 - \$100,000  | 6  |
| \$100,001 - \$130,000 | 7  |
| \$130,001 - \$160,000 | 8  |
| \$160,001 - \$200,000 | 9  |
| \$200,001 or more     | 10 |
| Prefer not to say     | 97 |

### ASK ALL

#### J3 | CALD | {SINGLE}

Do you speak a language other than English at home?

|                                                    |   |
|----------------------------------------------------|---|
| Yes, I speak a language other than English at home | 1 |
| No                                                 | 2 |
| I'd prefer not to say                              | 9 |

### ASK IF J3 = 1

#### J4 | LANGUAGE | {MULTIPLE}

Which other language do you speak at home? *Please select all that apply*

|            |    |
|------------|----|
| Arabic     | 1  |
| Cantonese  | 2  |
| Filipino   | 3  |
| German     | 4  |
| Greek      | 5  |
| Hindi      | 6  |
| Italian    | 7  |
| Korean     | 8  |
| Mandarin   | 9  |
| Vietnamese | 10 |

## Long Methodology Disclosure Statement

|                        |    |
|------------------------|----|
| Other [please specify] | 97 |
|------------------------|----|

### ASK ALL

#### J5 | FIRST NATIONS | {SINGLE}

Do you identify as being of Aboriginal origin, Torres Strait Islander origin, or both?

|                                                 |   |
|-------------------------------------------------|---|
| Yes, Aboriginal only                            | 1 |
| Yes, Torres Strait Islander only                | 2 |
| Yes, both Aboriginal and Torres Strait Islander | 3 |
| No                                              | 4 |
| Prefer not to say                               | 9 |

### ASK ALL

#### J6 | EDUCATION | {SINGLE}

What is the highest level of education that you have completed?

|                                             |    |
|---------------------------------------------|----|
| Postgraduate degree (honours, Masters, PhD) | 1  |
| Graduate diploma or graduate certificate    | 2  |
| Bachelor degree (undergraduate)             | 3  |
| Advanced diploma or diploma                 | 4  |
| Certificate (TAFE)                          | 5  |
| Year 12                                     | 6  |
| Year 11                                     | 7  |
| Year 10 or under                            | 8  |
| I'd prefer not to say                       | 97 |

### ASK ALL

#### J7 | HOME TYPE | {SINGLE}

And which one of the following best describes your current home type?

|                                                         |    |
|---------------------------------------------------------|----|
| Separate house                                          | 1  |
| Semi-detached, terrace, town house or villa, 1 storey   | 2  |
| Semi-detached, terrace, town house or villa, 2+ storeys | 3  |
| Flat, unit or apartment 1-2 storey block                | 4  |
| Flat, unit or apartment 3 storey block                  | 5  |
| Flat, unit or apartment 4+ storey block                 | 6  |
| Flat or unit attached to a house                        | 7  |
| House or flat attached to a shop or office              | 8  |
| Caravan, cabin or houseboat                             | 9  |
| Some other type (please specify)                        | 10 |
| Not sure                                                | 97 |

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**ASK ALL****J8 | HOME OWNERSHIP STATUS | {SINGLE}**

What is your current home ownership status?

|                                    |    |
|------------------------------------|----|
| Owner without mortgage             | 1  |
| Owner with a mortgage              | 2  |
| Renter                             | 3  |
| Living rent free                   | 4  |
| Some other tenure (please specify) | 5  |
| Not sure                           | 97 |

**ASK ALL****J9 | SOLAR STATUS | {SINGLE}**

Does your home currently have solar panels installed?

|                     |   |
|---------------------|---|
| Yes                 | 1 |
| No                  | 2 |
| No but intending to | 3 |

**THANK AND CLOSE****Sydney**

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