EV & Hybrid Vehicle Wave 4 (November 2025) Insights Report

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Research Objectives

The objectives for this research can be summarised as to…

> **“ …update our understanding of beliefs and perspectives on EVs and hybrid vehicles among Australian vehicle drivers ”**

This research focuses on understanding Australian drivers, with a specific focus on understanding …

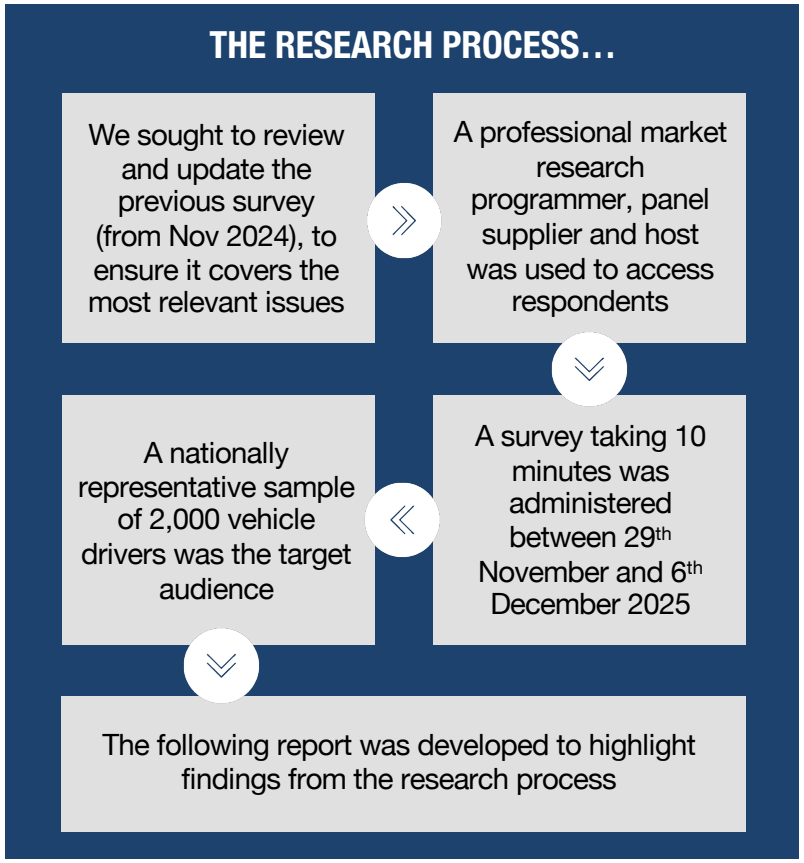
- The **type of vehicle they currently drive** (body style, age, fuel type);
- Their **willingness to purchase an electric vehicle** when replacing any of their current household vehicles;
- Specific **perspectives on electric and hybrid vehicles** (willingness to consider, drivers/barriers of consideration and price point analysis);
- **Attitudes towards EVs** and the role of individuals in driving uptake.

We know that **the EV space in Australia is shifting rapidly**, so after conducting initial research in September 2022 and then additional waves in January and November 2024, it was timely to once again test the market to see how things have shifted, if any.

To track shifts in sentiment and behaviours, we once again collected feedback from **a sample of 2,000 Australian drivers** (representative by age, gender and household location across Australia).

The results from the latest stage of research - **conducted in November 2025** - are detailed in this document.

Research Approach



This report primarily features results **from the November 2025 stage of research**, but there are times throughout where we also include the corresponding figures from previous research stages (September 2022, January 2024 and November 2024).

Where no significant differences between time periods are noted, we have at times not included the previous wave's figure.

Refreshing Our Survey

This tracking wave **involved making some minor updates to our research questionnaire** to ensure our findings can address some important hot topics for AADA.

We **took great care to ensure our key tracking questions were consistent with past stages of research**, and used this stable platform to track any real shifts in driver perceptions and preferences from wave to wave.

Here are the changes we introduced for the 2025 wave…

- We added a question relating to **a proposed distance-based Road User Charge** and tested for potential impact on consideration of EVs.
- We added a question to evaluate the extent to which **country of manufacture** is considered important to drivers when deciding on a car to buy.
- We **removed questions** related to the new Fuel Efficiency Standards and the perceived convenience of dealer-based EV charging facilities.

Executive Summary

An overview of our key research findings…

Key Research Headlines

NEW CAR PURCHASE INTENTION REMAINS SOLID...

In spite of the challenging economic times, we've noticed strong ongoing intention to replace current vehicles with brand new ones (rather than used).

In addition, we haven't noted any shift to delaying the next vehicle purchase (one in five remain likely to replace their main vehicle in the coming 12 months).

GROWTH IN INTENTION FOR MEDIUM/ LARGE SUVs.

Our study is showing a longer-term trend towards drivers preferring medium and large SUVs over smaller vehicles. Furthermore, over the past two years, we've seen a steady decline in intention of medium cars.

It suggests that vehicle sizes may be on the rise in future.

EV INTENTION FOR MAIN VEHICLE IS STEADY, BUT FALLS FOR 'OTHER VEHICLES'.

Since 2022, intention for EVs to replace a next main household vehicle has remained steady. Intention for EVs was at 38% in September 2022 and is now at 38%.

However, over the past 12 months, intention of EVs for replacing a secondary/tertiary vehicle in the household has dropped significantly.

EVs CONTINUE TO BE 'FOR' ONLY CERTAIN COHORTS.

While EV intention is stagnant across the total driver base, we do see higher consideration among specific cohorts. Younger drivers, men and those living within 10km of a CBD are significantly more open to EVs in future than others.

It suggests that EV growth - at this stage - is still likely to be driven by demographic pockets rather than en masse.

ENVIRONMENTAL BENEFITS FOR EVs LESS OF A HOOK…

We see a significant decline in being better for the environment acting as a driver for considering an EV.

At the same time, we've seen an increase in intention drivers linked to perceived value for money and cost benefits of EVs. It suggests that willingness to engage with EVs is increasingly an economic decision rather than a values-based one.

DISTANCE-BASED RUC TO HAVE POSSIBLE NET NEGATIVE IMPACT ON EV CONSIDERATION…

While 20% say that a distance-based RUC would make them more willing to buy an EV, 27% say it would make them less willing to buy one.

Overall, therefore, there's a chance that introduction of a RUC such as this may have a dampening effect on overall intention for EVs.

Overview | Feedback On Electric Vehicles

38% **WOULD CONSIDER AN EV FOR THEIR NEXT MAIN VEHICLE [vs. 39% in Nov '24]**

2% **AVERAGE PRICE PREMIUM CONSUMERS WOULD PAY FOR AN EV [vs. 6% in Nov '24]**

KEY DRIVERS FOR EVs…

1. 'Better for the environment' ↓ [49%, down from 58% in Nov '24]
2. 'Represent the future of vehicles'
3. 'Cheaper to run and recharge'

BARRIERS TO EVs…

1. 'Cost too much'
2. 'I don't have the right setup at home'
3. 'Not enough charging infrastructure' ↓ [43%, down from 49% in Nov '24]

EV PRICING…

- Since last year, we've seen a strong decline in acceptance of a price premium for an EV over another fuel type
- The current accepted price premium for an EV sits at 2%, down from 6% last year. This may be linked to a combination of cheaper new EV models coming entering the market and a declining willingness to pay more.
- In November 2025, 65% agree that 'given the current economic times, I'm less willing to pay more for an EV over other fuel types'. It suggests that economic pressures are also hindering uptake of EVs.

What Has Changed Over Time?

	DEC '22	NOV '24	NOV '25	CHANGE (Nov '24-Nov '25)
Considering **replacing my main vehicle in the next 3 years**	53%	59%	59%	-/+
Likelihood to specifically consider **an EV for my next main vehicle**	38%	39%	38%	-1%
Not open to an EV due to perception that **EVs cost too much to purchase**	62%	55%	53%	-2%
% Agree 'Governments **should be incentivising more customers** to transition to EVs'	71%	62%	60%	-2%
% Agree 'I'm less willing to pay more for an EV over other fuel types **due to the current economic times**'	60%	64%	63%	-1%
% **price premium I'm willing to pay** for an EV over a similar vehicle with a traditional fuel type	+6%	+6%	+2%	-4%

In general, our study suggests that driver sentiment toward EVs hasn't shifted significantly since late 2022, despite new EV model availability and public awareness and narrative.

We've largely seen **consistent consideration of EVs** for the driver's next main vehicle (38%, steady from 38% in 2022).

Our study highlights that EV intention is **less linked now to environmental benefits** and is increasingly focused on **financial benefits to the driver**. On this basis, intention for EVs is linked to the financial times facing consumers.

Right now, over two thirds suggest that they're **less willing to pay more for an EV** due to the current economic times, and this is reflected in **a substantial decline in price premium willing to be paid** for EVs over ICE vehicles (2% vs. 6% in 2024).

Results that are significantly higher (⬆) and lower (⬇) at the 95% confidence level between November 2024 & November 2025.

ATTITUDES TO EVs…

60%
vs. 62%

"Governments should be incentivising customers more to transition to EV"

56%
vs. 56%

"I'm concerned I won't be able to afford a vehicle if govts ban the sale of conventional fuel vehicle"

65%
vs. 66%

"I expect to keep my current car for longer due to the current cost of living pressures"

54%
vs. 53%

"EVs don't have enough driving range for me to consider one"

63%
vs. 64%

"I'm less willing to pay more for an EV over other fuel types due to the current economic times"

27% ⬆
vs. 24%

"Now is the best time to buy an EV, as they will hold their resale value better"

Current Vehicles

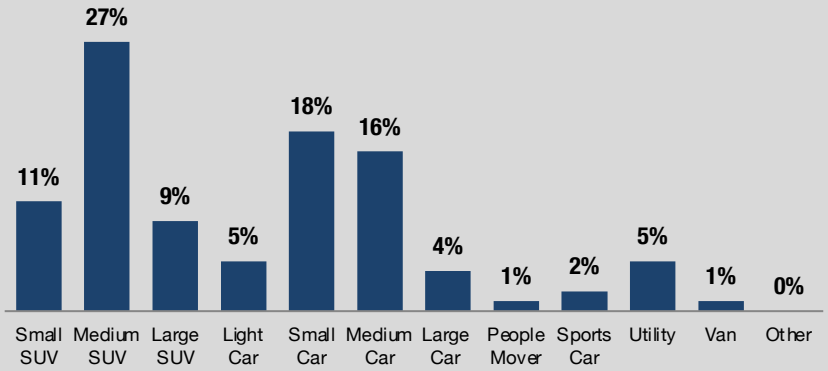
An update on our respondents' current vehicle ownership status…

Current Vehicle Profile…

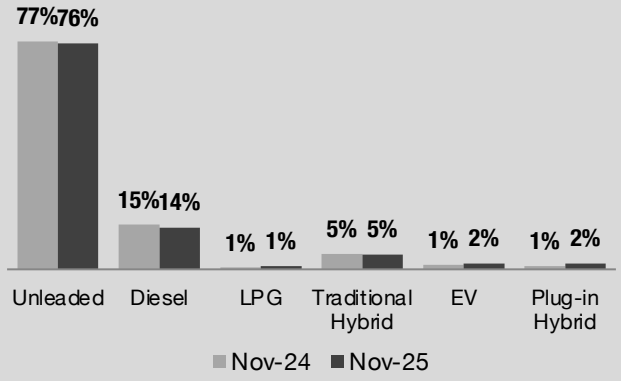
The most commonly driven vehicle type within our sample is **medium SUVs** (27%, up slightly from 24% in Nov '24). Prevalence of **small cars** in our sample has dropped now two waves in a row (from 25% in January to 22% in November and to 18% in November 2025). Otherwise the mix of main vehicles driven remains steady.

We've seen consistency of fuel types from 2024-2025. **Unleaded** (76%) remains the most common fuel type used, followed by **diesel** (14%). Prevalence of **EVs** has increased from 1% to 2% year-on-year.

WHAT SORT OF VEHICLE IS THE ONE YOU MAINLY DRIVE RIGHT NOW?



WHAT FUEL TYPE DOES THE VEHICLE YOU MAINLY DRIVE CURRENTLY USE?

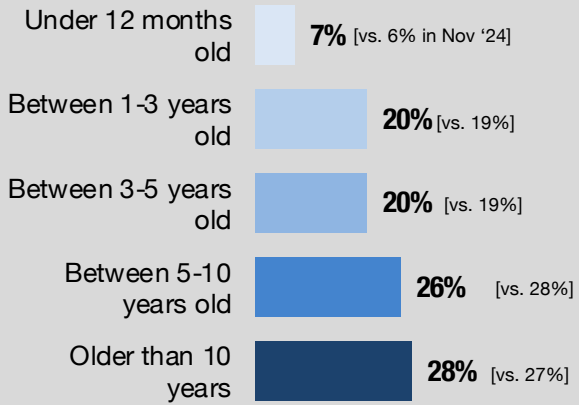


Q10. & Q11. Base: total respondents (n=2,000)

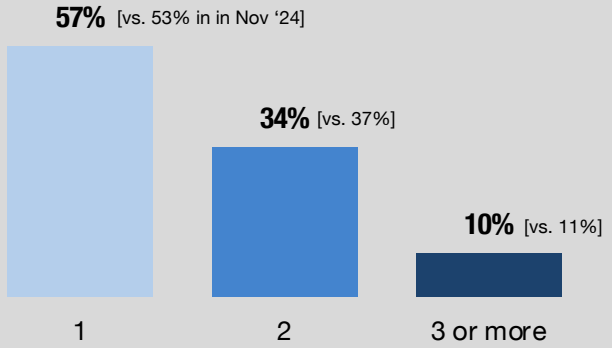
Results that are significantly higher (⬆) and lower (⬇) at the 95% confidence level between November 2024 and November 2025

Vehicle Age & Other Household Vehicles

HOW OLD IS THE VEHICLE YOU MAINLY DRIVE?



IN TOTAL, HOW MANY VEHICLES ARE THERE IN YOUR HOUSEHOLD?



The **age profile** of the main vehicle driven has remained consistent over the past four waves of research. Over half of our sample suggest the vehicle they mainly drive is **older than 5 years old** (54%), with 28% of this cohort driving a vehicle that is **more than 10 years old**.

We're seeing **significant growth in one-vehicle households** wave-to-wave (57%, up from 53% in November 2024. In particular we've seen a decline in households with two vehicles (34%, down from 37% last wave).

Q9. & Q12. Base: total respondents (n=2,000)

Results that are significantly higher (⬆) and lower (⬇) at the 95% confidence level between November 2024 and November 2025

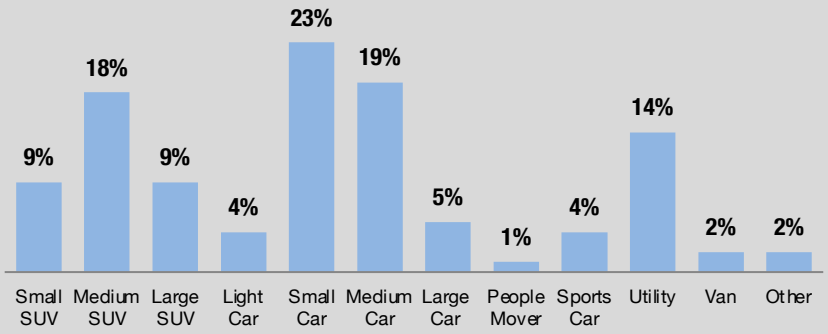
Other Household Vehicle Profile…

Among the cohort of respondents who have more than one vehicle in their household, the mix of other vehicles in the household tend towards smaller vehicles and cars specifically.

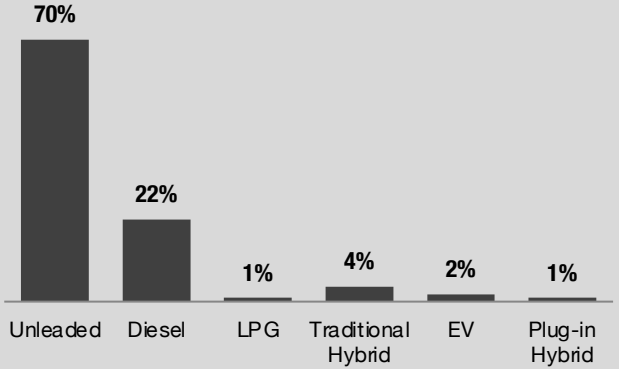
Small and **medium cars** are the most-listed 'other vehicles', followed by **Medium SUVs**. **Medium cars** and **small cars** are much more likely to be secondary vehicles in the household than main vehicles.

When it comes to fuel types in non-main vehicles, **unleaded** and **diesel** are again most prevalent…

BESIDE THE ONE YOU MAINLY DRIVE, WHAT OTHER VEHICLE TYPES ARE CURRENTLY IN YOUR HOUSEHOLD?



WHAT FUEL TYPE DO THESE OTHER VEHICLES IN YOUR HOUSEHOLD CURRENTLY USE?



Q17. & Q18. Base: total respondents (n=2,000)

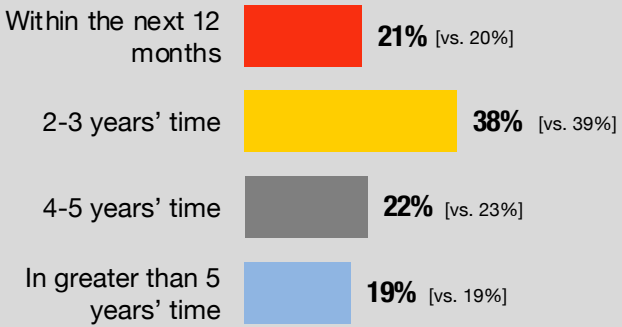
Results that are significantly higher (⬆) and lower (⬇) at the 95% confidence level between November 2024 and November 2025

Replacing Vehicles In Future

Reviewing plans for replacing their household vehicle/s, and to what extent EVs might play a role in this…

Replacing Current Vehicle/s…

WHEN DO YOU PLAN ON REPLACING THE VEHICLE YOU MAINLY DRIVE?



WHEN REPLACING THE VEHICLE/S IN YOUR HOUSEHOLD, IS YOUR INTENTION TO BUY…?

	BRAND NEW	USED
VEHICLE MAINLY DRIVEN	72%	28%
OTHER VEHICLES IN HOUSEHOLD	54%	45%

The timeline for vehicle replacement has remained steady between November 2024 and now, with 59% looking to replace their main vehicle **within the next three years** (vs. 59% last wave).

As per previous waves, main vehicles are notionally going to be **replaced with a brand new** (rather than used) **vehicle** (72% new / 28% used), up slightly on November 2024 results (where 71% intended new).

Across the past few waves, our findings suggest that appetite for new (rather than used) vehicles remains strong among the broader driver base.

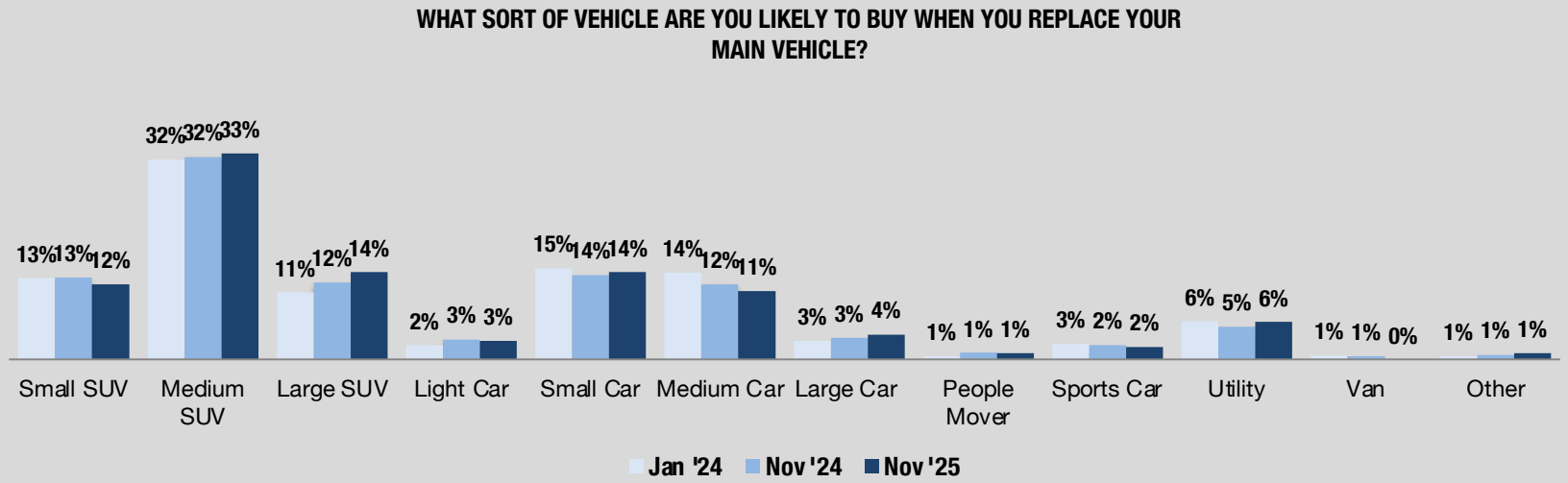
Q14. & Q19 Base: total respondents (n=2,000)

Results that are significantly higher (⬆) and lower (⬇) at the 95% confidence level between November 2024 and November 2025

Type Of Vehicle Intended Next…

Medium SUVs continue to be the most sought-after vehicle type for the next main household vehicle (33%), followed by **small cars** (14%), **large SUVs** (14%) and **small SUVs** (12%).

While no vehicle type has shown significant growth in popularity wave-to-wave, we're noticing **a longer-term trend towards large SUVs** (intention has grown from 11% in January 2024 to 14% in November 2025), and a **decline in intention of medium cars** (from 14% to 11% over the same time period).

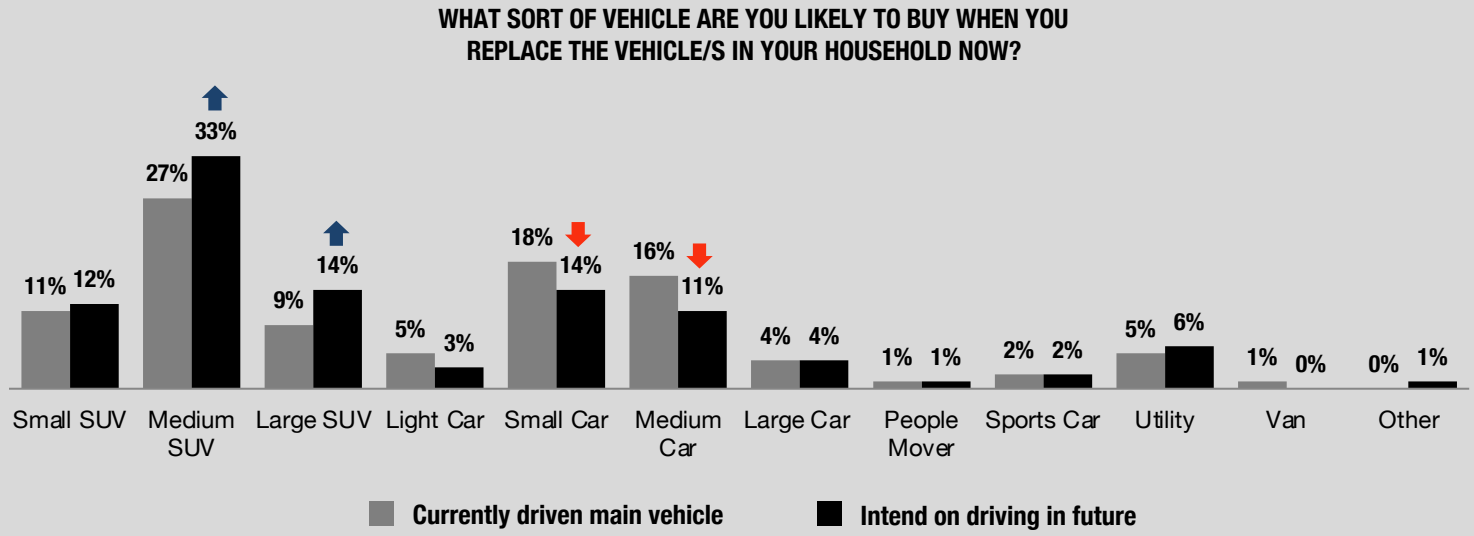


Q15. & Q17 Base: total respondents (n=2,000)

Results that are significantly higher (↑) and lower (↓) at the 95% confidence level between November 2024 and November 2025

Main Vehicle | Current vs. Future…

Similarly to the last wave of research, we note that compared to what's being driven as a main household vehicle now, future purchase intention indicates a trend **towards medium SUVs** (from 27% owned to 33% intended in future) **and large SUVs** (from 9% to 14%), and **away from small cars** (18% owned down to 14% intended) and **medium cars** (16% down to 11%).



Q15. & Q17 Base: total respondents (n=2,000)

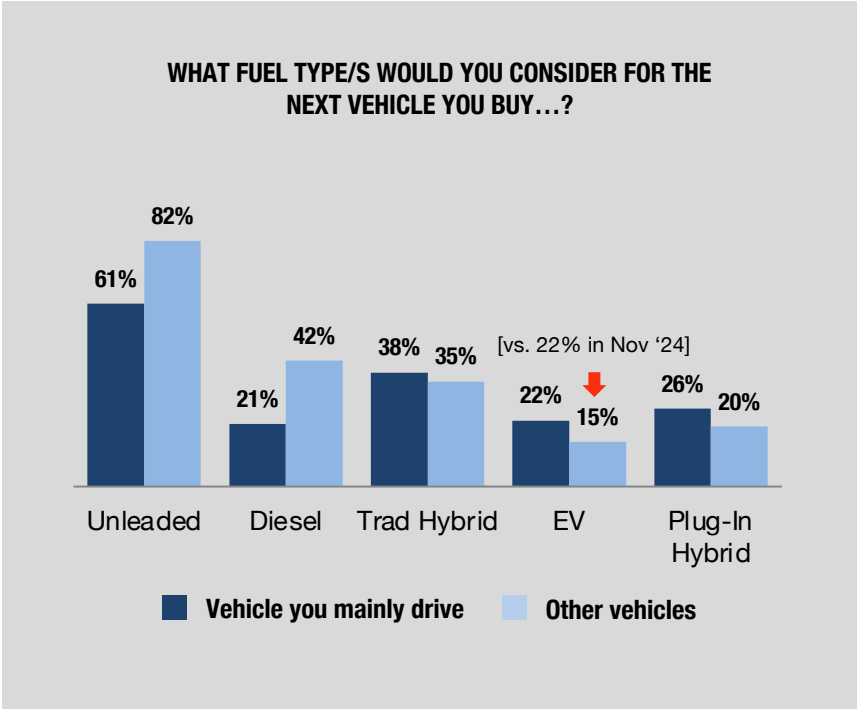
denotes vehicle types which are significantly more/less likely to be driven in future compared to driven now, at the 95% statistical confidence level

Fuel Types Considered Next…

Similarly to last wave, **unleaded engines** are most likely to be the expected 'next fuel types' for both the main vehicle driven (61%) and other vehicles to be replaced in the household (82%). This consideration of unleaded fuel has not shifted over time.

Around two in five are open to **traditional hybrid vehicles** for their next main vehicle (38%, up slightly from 36% in November 2024), while just on one in four (26%, up from 24%) are open to a **plug-in hybrid**.

Consideration of EVs for a next main vehicle is at 22% of the market, which is **slightly down from last wave** (23%). However, we've noticed a significant drop in consideration of EVs for a future 'other vehicle in household' purchase (15%, down from 22%).

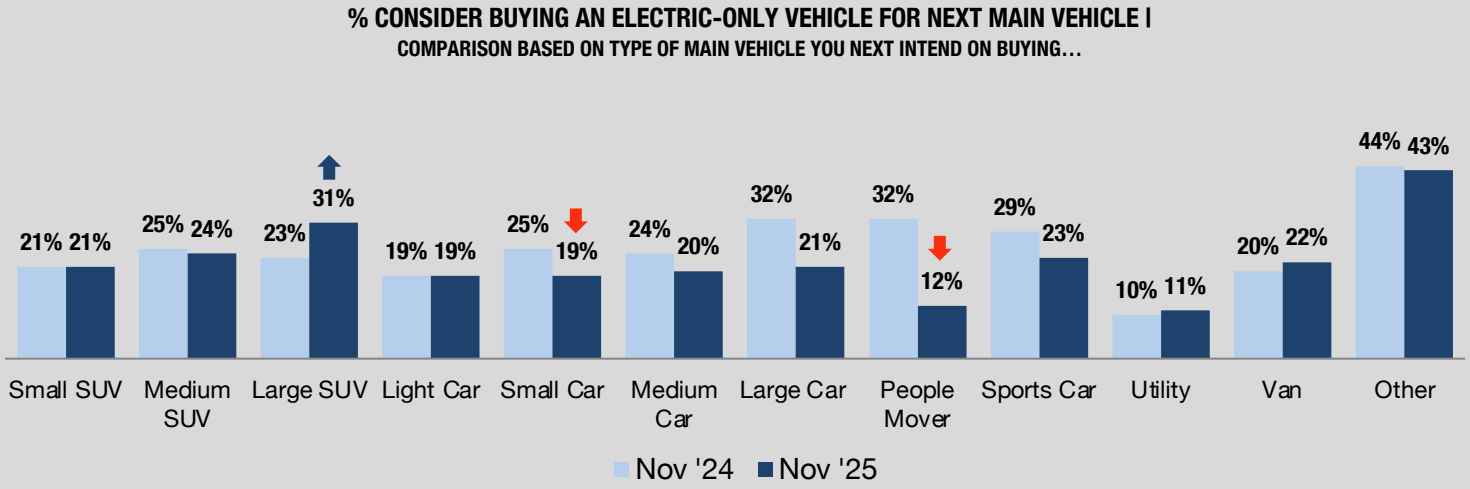


Q16. & Q20 Base: total respondents (n=2,000)

Results that are significantly higher (⬆) and lower (⬇) at the 95% confidence level between November 2024 and November 2025

Consideration Of EVs | By Main Vehicle Type Intended

Most commonly, intention to consider an EV on the next main vehicle driven is higher when replacing a **large SUV**, **medium SUV** or **sports car**, and is less prevalent when replacing a **small car**, **light car** or **people mover**.
The sense we get is that EVs are being thought of primarily as a solution to reducing high fuel costs (which the aforementioned vehicle types are most likely to be exposed to). Low EV consideration for **utilities** may be linked to a perceived lack of power/functionality for the purpose these vehicles are often used for.



Q16. & Q20 Base: total respondents (n=2,000)

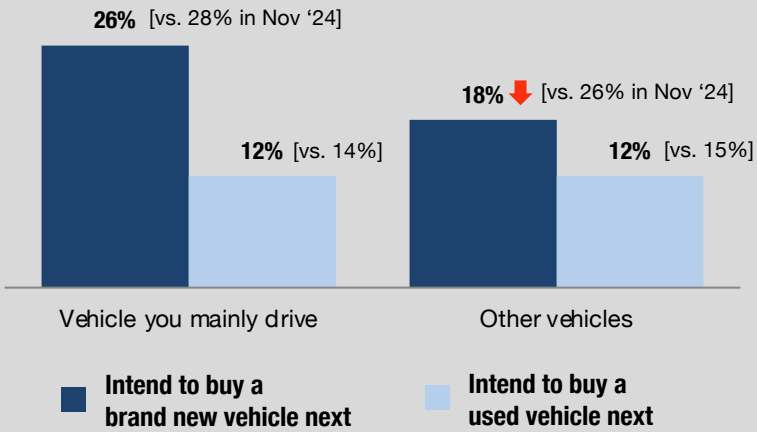
Results that are significantly higher (▲) and lower (▼) at the 95% confidence level between November 2024 and November 2025

Consideration Of EVs | By Intention For New vs. Used

Those who are likely to replace either their main vehicle or another household vehicle **with a brand new vehicle** are again more likely to be considering an EV than those who are looking to replace **with a used vehicle**.

We've **noticed a softening** of consideration of an EV for a future non-main vehicle purchase, suggesting that EVs are increasingly seen as being most fitting as a primary household vehicle.

% CONSIDER BUYING AN ELECTRIC-ONLY VEHICLE FOR NEXT MAIN VEHICLE |
COMPARISON BASED ON INTENTION TO BUY NEW VS. USED NEXT TIME…



Q16. & Q20 Base: total respondents (n=2,000)

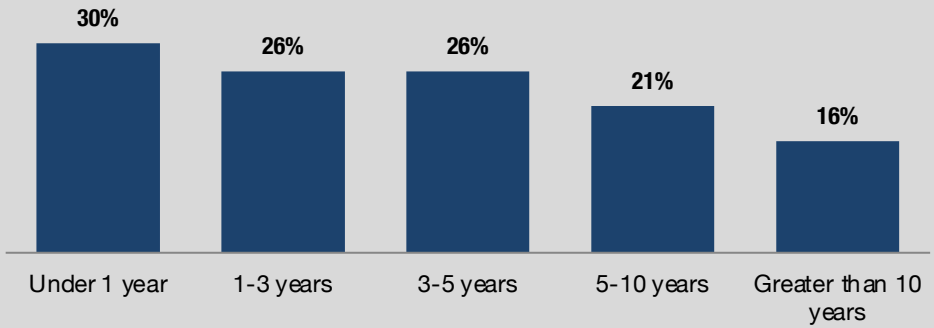
Results that are significantly higher (↑) and lower (↓) at the 95% confidence level between November 2024 and November 2025

Consideration Of EVs | By Age Of Current Vehicle

Willingness to buy an EV on the next main vehicle purchase remains slightly **higher among those whose current vehicle is newer** - 30% of those with a vehicle under 1 year old are willing to buy an EV when they replace this vehicle.

Openness to EVs drops off to just 16% among those who are currently driving a vehicle greater than 10 years old.

% CONSIDER BUYING AN ELECTRIC-ONLY VEHICLE FOR NEXT MAIN VEHICLE |
COMPARISON BASED ON AGE OF CURRENT VEHICLE…



Q16. & Q20 Base: total respondents (n=2,000)

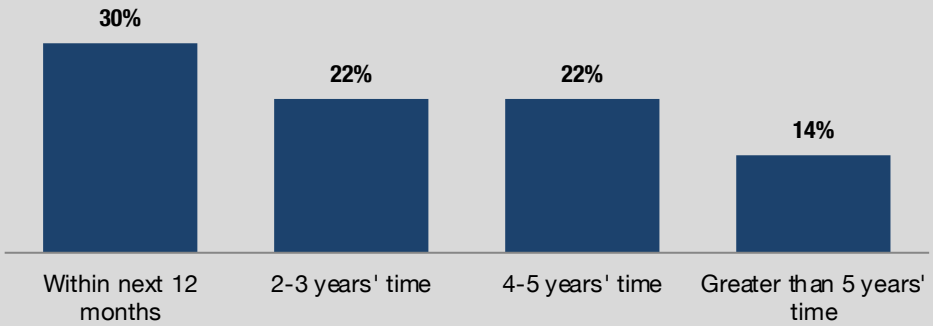
Results that are significantly higher (⬆) and lower (⬇) at the 95% confidence level between November 2024 and November 2025

Consideration Of EVs | By Timeline For Replacement

We've once again determined that **EVs are more likely to be in the consideration set of those who are after a replacement vehicle in the near term** compared to those with a longer-term replacement timeline.

Openness to EVs among those replacing their main vehicle **within the next 12 months** is at 30%, and this drops to 14% among those who are replacing their main vehicle **in greater than 5 years' time**.

% CONSIDER BUYING AN ELECTRIC-ONLY VEHICLE FOR NEXT MAIN VEHICLE |
COMPARISON BASED ON TIMEFRAME FOR REPLACING YOUR MAIN VEHICLE…



Q16. & Q20 Base: total respondents (n=2,000)

Results that are significantly higher (⬆) and lower (⬇) at the 95% confidence level between November 2024 and November 2025

Observations | Replacing Vehicles…

MAINTAINED PREFERENCE FOR NEW OVER USED

When looking at replacing either their main or secondary vehicles in the household, we see **ongoing driver preference for buying a brand new over a used car**.

LONGER-TERM TREND TOWARDS LARGE SUVs & AWAY FROM MEDIUM CARS

While not significant wave-to-wave, we've noted a multi-wave growth trend in future purchase intention of **large SUVs**, with a corresponding decline in intention to buy **medium cars**.

SOFTENING IN CONSIDERATION OF EVs…

After some growth between 2022 (21%) and January 2024 (25%), consideration of an EV for the next vehicle purchase in the household **has stagnated more recently** (22%). Consideration of an EV for a future non-main vehicle has declined significantly over the past year.

SLOW GROWTH IN OPENNESS TO HYBRID VEHICLES

Since January 2024, we've seen **very slow growth** (but growth nonetheless) in intention of Traditional Hybrids and Plug-In Hybrids for drivers' next main vehicle. Growth for each is in the magnitude of around 2%.

EVs ARE MORE APPEALING TO NEW CAR BUYERS & NEAR-TERM INTENDERS

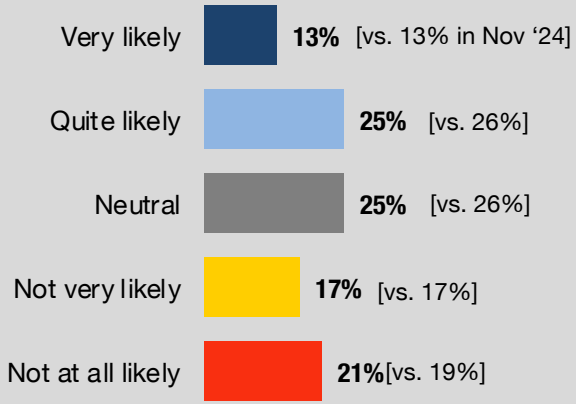
Intention of EVs for the next main vehicle bought is higher **among new car buyers** (26%) and those who are looking to **replace their vehicle in the next 12 months** (30%).

Focus On EVs

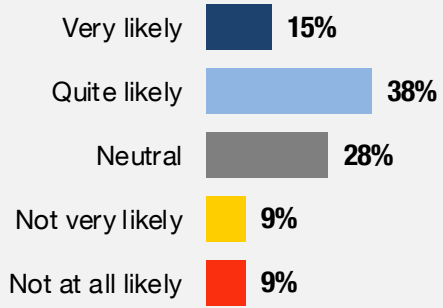
Specific feedback on drivers/barriers to EVs and the status quo of beliefs around EVs…

Consideration Of Hybrid & Electric

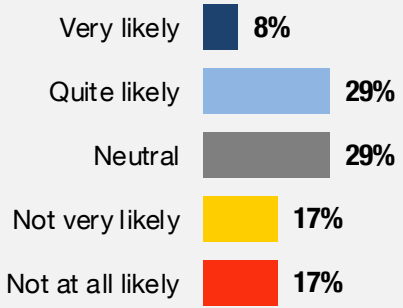
SPECIFICALLY, HOW LIKELY ARE YOU TO CONSIDER AN EV FOR THE NEXT VEHICLE YOU MAINLY DRIVE?



HOW LIKELY ARE YOU TO CONSIDER BUYING A TRADITIONAL HYBRID VEHICLE IN FUTURE?



HOW LIKELY ARE YOU TO CONSIDER BUYING A PLUG-IN HYBRID VEHICLE IN FUTURE?



Prompted consideration of an EV for the next vehicle they mainly drive **has remained steady** in the Australian market since 2022. 38% now say they're very or quite likely to consider buying an EV, which is **the same as the September 2022 result** (38%).

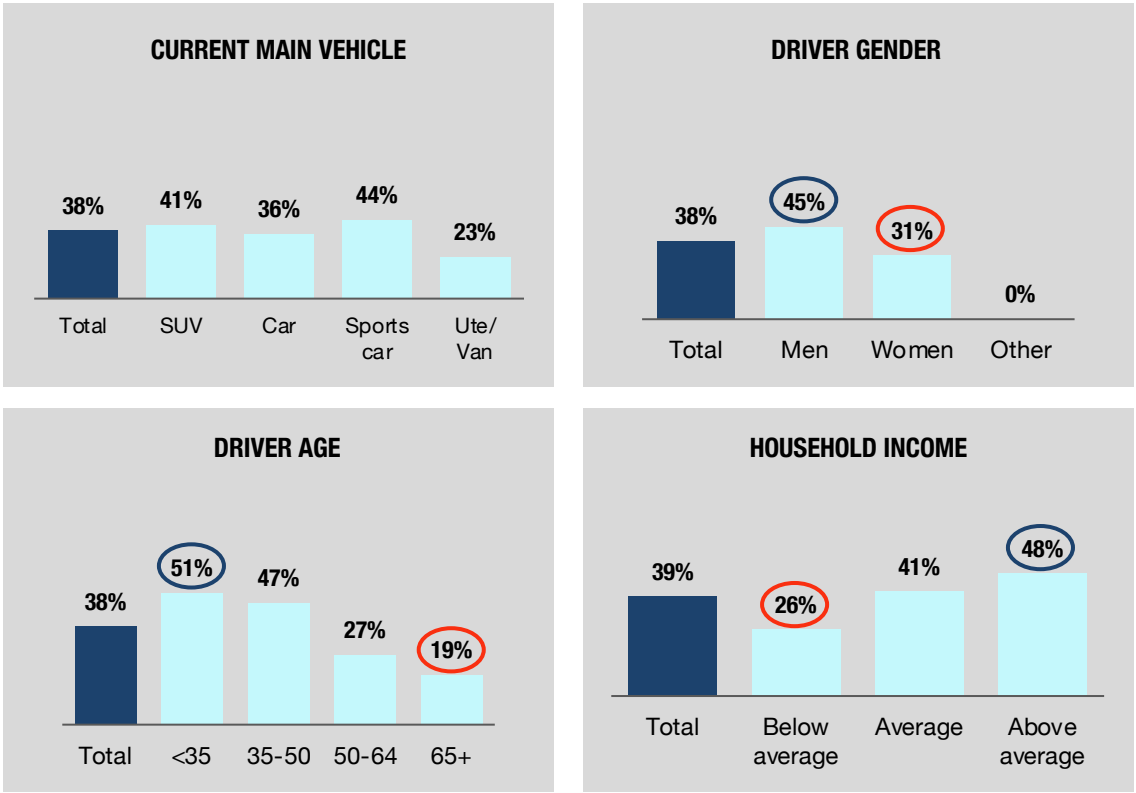
Openness to a **traditional hybrid** is higher (53%, up from 52% in November 2024), while consideration of **plug-in hybrids** is at 37% (up by 1% from last wave, but remaining just below the level of consideration of an EV).

Q21. & Q24. Base: total respondents (n=2,000)

Results that are significantly higher (⬆) and lower (⬇) at the 95% confidence level between November 2024 and November 2025

Profiling | Consideration Of Electric Vehicles

% ARE VERY/QUITE LIKELY TO CONSIDER AN EV FOR THEIR NEXT VEHICLE



Men, **younger drivers** (aged under 50 years) and **higher income households** remain more likely than their respective comparison demographics of women, lower-income households and older drivers to be open to considering an EV.

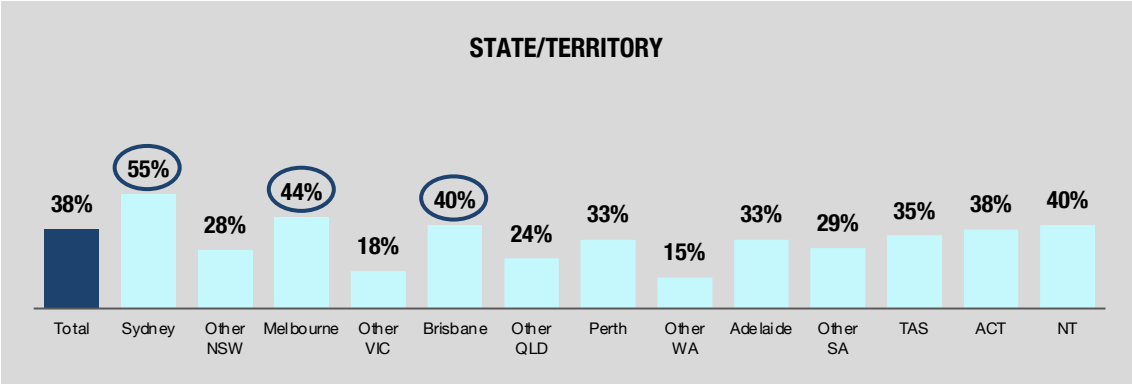
It suggests that openness to EVs continues to exist more within specific demographic cohorts rather than reaching a mainstream driver profile.

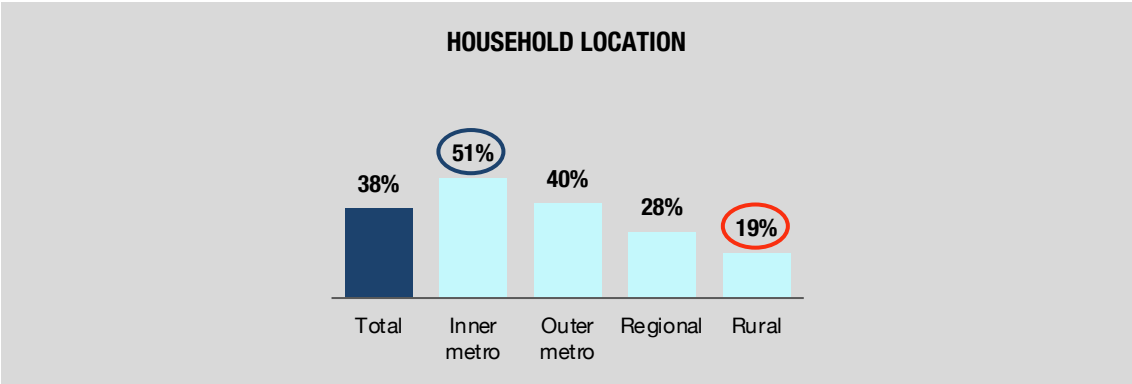
Q21. Base: respondents who are very/quite likely to consider an EV in future (n=754)

denotes results which are significantly higher/lower than comparative sub-groups at the 95% confidence level

Profiling | Consideration Of Electric Vehicles

% ARE VERY/QUITE LIKELY TO CONSIDER AN EV FOR THEIR NEXT VEHICLE





As with last wave, consideration of EVs is stronger among **residents of the major capital cities** than among those living in **regional/rural areas** of the same state/territory.

Specifically, consideration of EVs remains highest among those in **Sydney**, **Melbourne** and **Brisbane**.

When we categorise household postcodes of our sample into region types, we see consideration **at its highest among those living within 10km of a major city** (51%).

Compared to the November 2024 research wave, we've seen a decline in consideration of EVs among those in **rural** (19%, down from 21%) and **regional** areas (28%, down from 33%).

Q21. Base: respondents who are very/quite likely to consider an EV in future (n=754)

denotes results which are significantly higher/lower than comparative sub-groups at the 95% confidence level

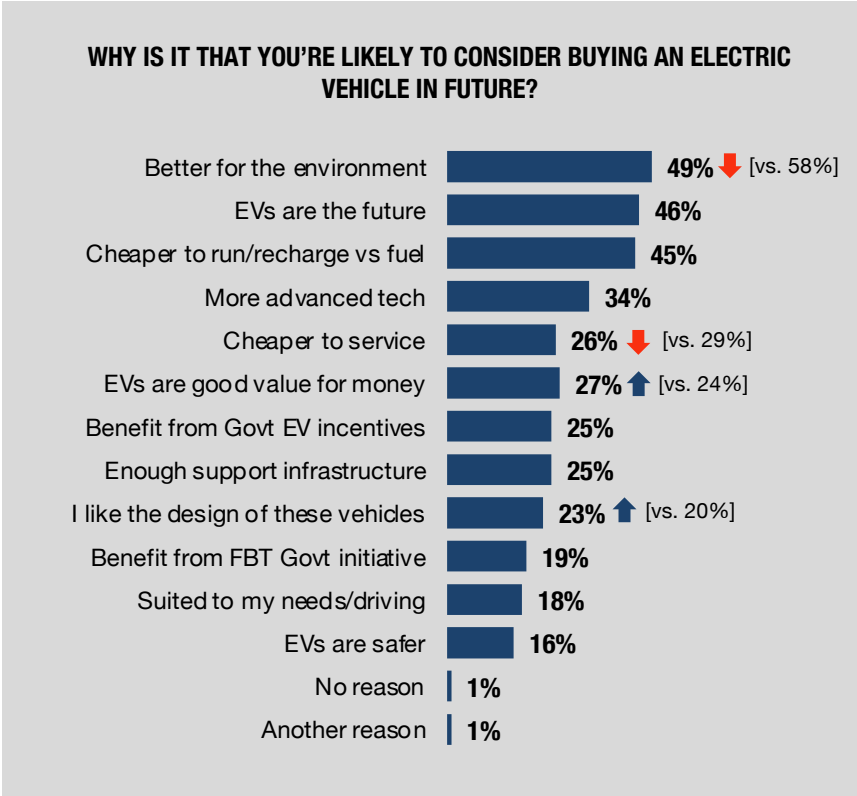
Drivers Of Considering An EV…

The most common reasons for being open to considering an electric vehicle continues to include the idea that they're **better for the environment** (49%) and representing an inevitable **step into the future** (46%).

However, for the second wave running, we've noticed significant decline in EVs being **better for the environment** acting as a driver for considering EVs. This is down to 49% from 67% in January 2024.

At the same time, we've noticed an increase more recently in a sense that EVs provide **value for money** and an increase in consumers **liking the design** of these vehicles

It suggests that the customer narrative and drivers for considering an EV are shifting away from environmental benefits and more towards the financial benefits/savings that EVs can afford.



Q23. Base: those who are likely to buy an EV in future (n=754)

Results that are significantly higher (↑) and lower (↓) at the 95% confidence level between November 2024 & November 2025

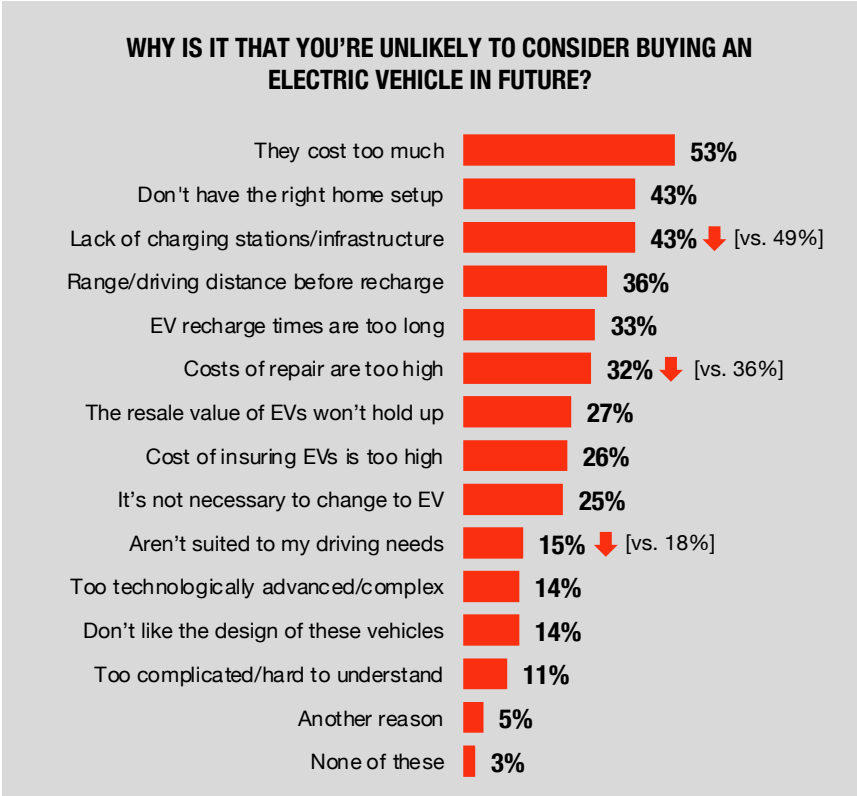
Barriers To Considering An EV…

The most common reason for being unlikely to consider an electric vehicle remains a concern around **them costing too much** (53%). However, compared to September 2022 results (62%), this concern has dropped substantially. It indicates that price is less singularly a barrier as new, more affordable models have come to market.

Other perceived barriers include charging infrastructure – 43% are concerned that they **don't have the right setup at home** to charge their vehicle and a similar proportion feel there isn't enough charging infrastructure available generally.

Compared to last wave, we've seen significant decline in concern about the **lack of charging stations/infrastructure** for EVs (43%, down from 49%), about **costs of repair** (32%, down from 36%) and about a lack of **suitability for my driving needs** (15%, down from 18%).

It suggests that there may be fewer perceived functional barriers to owning an EV over other vehicle types, although this is yet to convert to higher EV intention across the market.



Q22. Base: those who are unlikely to buy/unsure about buying an EV in future (n=1,246)

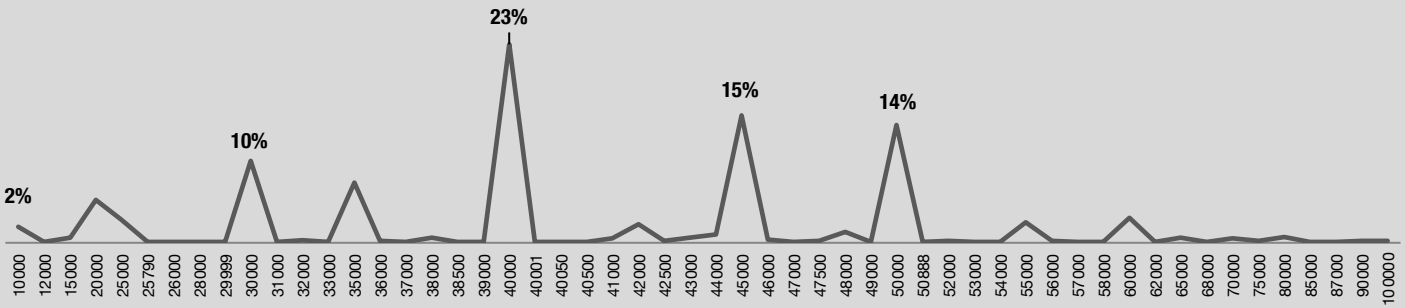
Results that are significantly higher (▲) and lower (▼) at the 95% confidence level between November 2024 & November 2025

EV Price Point…

We again posed a hypothetical for respondents whereby a petrol vehicle priced at $40k could be made available in an EV variant - we asked them how much they'd be prepared to pay for an EV variant of that same vehicle. **4.8% said they'd pay 'nothing'** (which is consistent with all previous waves).

Overall, 44% (stable from 44% in November 2024) **are willing to pay more for an EV than a petrol variant** – 15% would be willing to pay $5k more and 14% would pay $10k more. On balance, the overall average price drivers are willing to pay is **$40,800** (which represents a 2% price premium). This **price premium has declined from 8% in January 2024 and 6% in November 2024**, perhaps reflecting a mix of reduced perceived value for money from EVs and lower new EV prices coming to market.

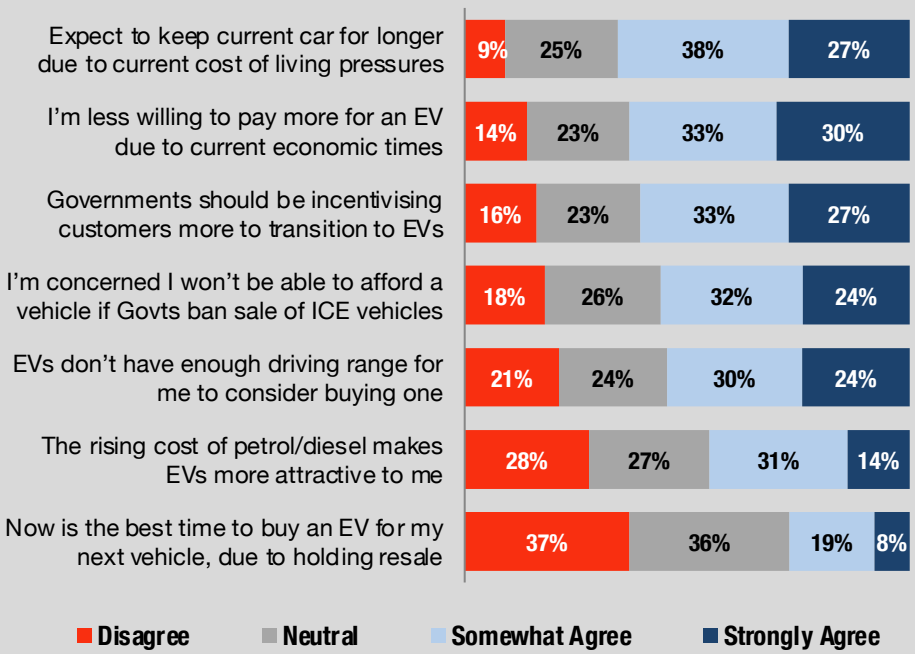
IMAGINE YOU WERE IN THE MARKET FOR A PETROL VEHICLE THAT IS AVAILABLE FOR $40,000. WHAT PRICE WOULD YOU BE PREPARED TO PAY FOR AN ELECTRIC VERSION OF THIS SAME VEHICLE?



Ave. price	$40,800
% would pay more than $40k	44%
% would pay $40k	23%
% would pay less than $40k	29%

Q25. Base: total respondents (n=2,000)

Attitudes To EVs



The overall mood towards EVs has remained steady over the past year.

Almost two in three (65%) expect to **hold onto their current vehicle for longer** due to cost of living pressures, while 63% say they're **less willing to pay more for an EV now due to the economic times**.

Three in five (60%) say they're in support of **Governments incentivising customers more** to transition to EVs.

We've noted an increase in the total proportion who agree that **now is the best time to buy an EV for my next vehicle due to them holding their resale better** (27%, up from 24% last year).

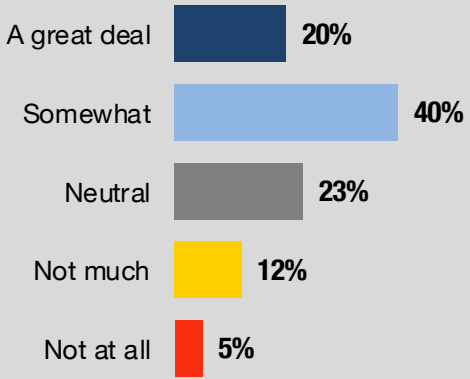
Q26. Base: total respondents (n=2,000)

Importance Of Country Of Manufacture

In the November 2025 research wave, we introduced a new question to measure the role that country of manufacture plays in guiding vehicle purchase decisions. Overall, three in five (60%) drivers say that country of manufacture **has at least some impact** on their purchase decision.

This did not differ greatly by demographic cohorts, except for **those living in high-income households** (those earning $200k or higher) being more likely than others to focus on country of manufacture (70%).

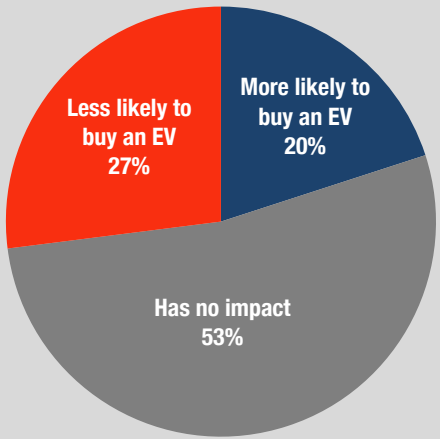
TO WHAT EXTENT DOES THE COUNTRY OF MANUFACTURE INFLUENCE YOUR PURCHASE DECISION?



Q33. Base: total respondents (n=2,000)

Impact Of Proposed Road User Charge…

HOW WOULD THE INTRODUCTION OF AN UPCOMING DISTANCE-BASED ROAD USER CHARGE POTENTIALLY IMPACT YOUR WILLINGNESS TO BUY AN ELECTRIC VEHICLE?



We introduced the idea of the Government considering a distance-based road user charge (RUC) which would affect all road users, including drivers of EVs. Following the introduction of the idea, we asked whether it would impact their consideration of an EV in future.

Overall, 20% suggest that this type of RUC would make them more likely to buy an EV, with 27% saying they'd be less likely to buy an EV. Overall, this represents **a potential net negative impact on EV consideration** of -7%.

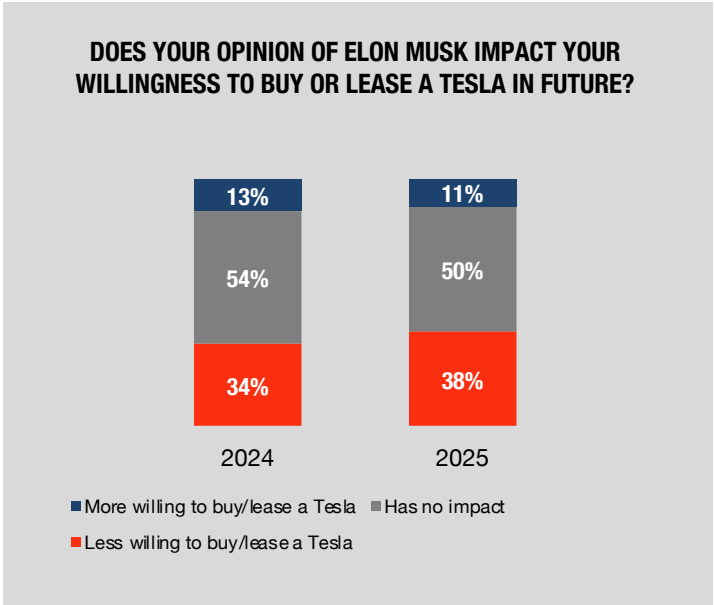
When we analyse differences in findings by demographics, we don't see any significant differences by cohorts based on them being less likely to buy an EV in response to a distance-based RUC. However, we do note some cohorts **who are more likely to buy an EV** with the distance-based RUC…

- Those **aged under 50** (29%)
- Those in **higher income households** (25%)
- Those living **within 10km of a major CBD** (29%)

The sense we get is that those whose demographics makes them appear more likely to take shorter trips/driving fewer KMs feel that EVs may represent even better value overall with a distance-based RUC.

Q34. Base: total respondents (n=2,000)

Elon Musk & Tesla



Overall, **Elon Musk's reputation is continuing to have a net negative effect** on consideration of a Tesla (38% are less likely to consider one vs. 11% being more likely to consider one due to their opinion of Musk).

This is an overall net negative impact of -27%, which is even more negative than was the case in November 2024 (-21%).

Q32. Base: total respondents (n=2,000)

Observations | EV Focus…

EVs REMAIN 'FOR CERTAIN TYPES OF PEOPLE', NOT MASS

38% are now open to considering an EV specifically for their next vehicle, which is **flat from 2024** (38%).

Intention is higher for specific sub-groups, including men, younger drivers, higher-income households and inner-city drivers.

INTENTION OF EVs LESS DRIVEN BY THE ENVIRONMENT, MORE ABOUT VALUE

We've seen **a decline in environment benefits** being seen as a key driver of considering an EV, and growth in a sense that they provide good value for money.

EVs COMMANDING A LOWER ACCEPTED PRICE PREMIUM

In January 2024, consumers indicated a willingness to pay an 8% price premium for an EV over an equivalent ICE vehicle. **This has dropped to a 2% premium** in November 2025.
This may be linked to less expensive models coming to market but also to a declining sense of premium for EVs over other fuel types.

DISTANCE-BASED RUC MAY HAVE A NET NEGATIVE IMPACT ON EV CONSIDERATION

27% of drivers say they'd be less likely to consider an EV if a distance-based RUC was introduced, with 20% saying they'd be more likely to consider one.
Overall, this **indicates a potential net negative influence on EV consideration** in the magnitude of -7%.

Appendix: Sample Profile

Demographic profile of sample

Demographic Profile Of Sample

AGE	n=	%
17-29	352	18%
30-39	390	20%
40-49	367	18%
50-59	341	17%
60+	550	28%

GENDER	n=	%
Male	981	49%
Female	1019	51%
Other	0	0%

LIFE STAGE	n=	%
Single	495	25%
Couples, no kids	258	13%
Young Families	187	9%
Middle Families	340	17%
Mature Families	353	18%
Empty Nesters	367	18%

HOUSEHOLD LOCATION	n=	%
Within 10km of CBD	557	28%
Metro >10km from CBD	783	39%
Regional	352	18%
Rural	308	15%

Demographic Profile Of Sample

HOUSEHOLD LOCATION	n=	%
Sydney	410	21%
Other NSW	218	11%
Melbourne	385	19%
Other VIC	120	6%
Brisbane	205	10%
Other QLD	200	10%
Perth	160	8%
Other WA	40	2%
Adelaide	121	6%
Other SA	41	2%
TAS	40	2%
ACT	40	2%
NT	20	1%

HOUSEHOLD INCOME	n=	%
Less than $20 000	39	2%
$20 000 - $39 999	198	10%
$40 000 - $59 999	212	11%
$60 000 - $79 999	215	11%
$80 000 - $99 999	240	12%
$100 000 - $124,999	255	13%
$125,000 - $149,999	235	13%
$150,000 - $199,999	242	12%
$200,000+	246	12%
Don’t know	23	1%
Prefer not to say	95	5%