



2022



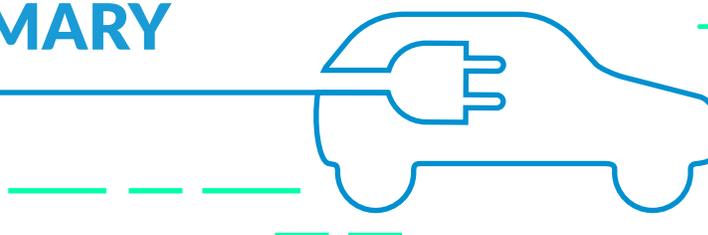
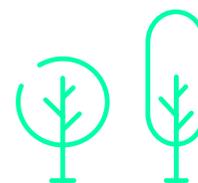
# ANNUAL REPORT

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## EXECUTIVE SUMMARY



Since its official launch in late 2020, stimulated by the California Air Resources Board (CARB)'s Low Carbon Fuel Standard (LCFS) and supported by electric distribution utility (EDU) companies statewide, the California Clean Fuel Reward (CCFR) program has rewarded hundreds of thousands of electric vehicle (EV) customers in the State of California. EV customers, as a group, continue to multiply year over year in response to global climate concerns, anticipated government regulatory changes, and the persistently high price of fossil fuels. As such, the CCFR program has maintained tremendous popularity with both EV customers and their retailers.

Through most of 2021, CCFR had maintained a \$1,500 point-of-sale reward amount for the purchase of eligible new plug-in light-duty vehicles at participating retailers. However, market conditions presented many challenges to the long-term sustainability of the reward amount. So, in late 2021, the CCFR Steering Committee approved a reduction of the maximum reward amount from \$1,500 to \$750.

In 2022, due to the aforementioned popularity of the program and rapid increase in electric vehicle sales throughout the year, dedicated reward funds were rapidly depleted. In addition, the revenues generated from LCFS credits were not as high as originally projected. As such, the reward amount was temporarily reduced again in August 2022, this time to \$0, where it remained through the end of the year. Yet, due to steady demand for program rewards and ever-increasing enrollment from participating retailers, 2022 presented many insights as well as opportunities for enhancement and improved program efficacy, specifically in the areas of marketing, education, and outreach.

While 2021 focused its marketing communications efforts primarily on seasonality—targeting peak automotive sales periods—2022 focused on consistency: even distribution of dollars allocated throughout the year. As a result, the program website achieved billions of impressions, millions of clicks, and millions of video views.

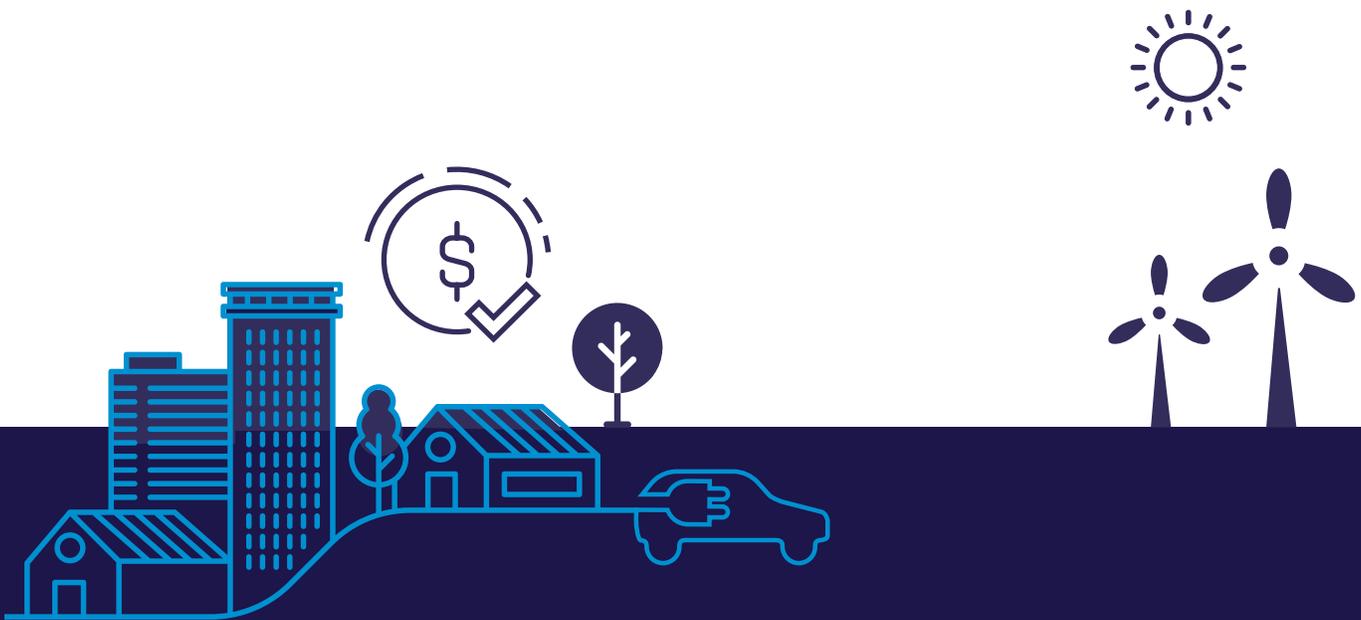
With the number of new original equipment manufacturer (OEM) entrants into the EV space diminishing, CCFR's training efforts shifted from securing retailer enrollments to enhancing the retailer team's EV sales education. Through a variety of virtual touchpoints, such as text-message educational communications, target audiences were provided with a variety of on-demand, at-the-point-of-need resources. But, new for 2022, program education shifted from a primarily virtual approach to one of increased onsite presence of program consultants directly supporting retailers and their teams at the store level. The increased onsite presence led to key learnings such as greater need for role and priority clarification, understanding EDU environmental goals and offerings as a key point-of-sale strategy, and the importance of direct engagement between program consultants and retailers.

Launching in late November 2021 and carrying through May 2022, the Community Partner Outreach Pilot (CPOP) program focused its efforts on improving EV awareness and education in underserved communities. Addressing the unique challenges of equity audiences, partner relationships were established with Valley Clean Air Now, Redeemer Community Partnership, Liberty Hill Foundation, and Latino and Latina Roundtable of the San Gabriel and Pomona Valley. Supported by these organizations, focused social media posts, Facebook Live events, and live in-person events greatly increased community engagement with CPOP's target audiences, despite the significant challenge posed by state and local COVID-19 protocols.

As a final component of CCFR's outreach efforts, both retailer and consumer surveys were implemented to capture key feedback data on current program viability and desired future enhancements. The one-time retailer survey sent in January 2022 revealed that 88% of retailers agree or strongly agree that the program is excellent, with the majority of respondents indicating that CCFR helps their dealerships sell more EVs. Likewise, consumers have indicated strong favorability toward the program, rating their overall purchase experience 4.5 out of 5. Approximately 384,000 surveys have been deployed and around 70,000 responses received since the beginning of the program through year-end 2022.

Overall, through year-end 2022, incremental retailer enrollments remained steady, until the temporary reward-amount reduction was implemented. Continuing a pattern that began Q2 2021, odd-numbered quarters saw an average incremental increase in retailer enrollments in the high 30s, while even-numbered quarters average in the high 70s. Other trends such as retailer enrollment by brand, retailer enrollment by EDU territory, etc., retain the same patterns that we saw in 2021.

In terms of rewarded customers, submissions increased roughly 90% on average each month for the first half of 2022. Likewise, processing times grew slightly in the first half of the year due to the increased submission volume. No additional rewards were applied to vehicle sales or leases after August 31, 2022. However, retailers were able to continue submitting all final claims for reimbursement through the end of the year.



# 01 BACKGROUND

# 01 BACKGROUND

## HISTORY

The following milestone dates outline the history and formation of the CCFR program.

### September 27, 2018

Transportation electrification is essential to achieving California's greenhouse gas (GHG) reduction targets. The CCFR program was conceived with the stated goal of accelerating EV adoption by offering a simplified and consistent EV reward on all new vehicle purchases or leases. CARB adopted amendments to the LCFS Regulation (17 CCR§ 95480 et seq.) that mandated that utilities contribute a certain percentage of their LCFS credit revenue to a statewide program. To that end, electric utilities, in collaboration with CARB, the California Public Utilities Commission (CPUC), and automakers, created a statewide, electric utility operated, point-of-sale reward program for the purchase of new qualifying plug-in hybrid (PHEV) or battery electric vehicles (BEVs). As discussed below, Southern California Edison Company (SCE) currently administers the program on behalf of all participating electric utilities.

The LCFS Regulation defines a progressive reward offered on any plug-in light-duty vehicle, starting with a battery size greater than 5 kWh, with the full reward amount available on vehicles with batteries larger than 16 kWh. Light-duty vehicles are defined as all on-road vehicles with a gross vehicle weight rating (GVWR) less than 8,500 pounds.

### April 2, 2019

SCE submitted Advice Letter 3982-E to the CPUC requesting authorization to act as the interim CCFR administrator for three years and to work with the other utility sponsors to establish a CCFR Governance Agreement that would define the rules of operation for the program.

### Fall 2019

A group of more than 20 utilities from across the state negotiated the Governance Agreement for the CCFR. The document defines the roles and responsibilities of several committees, including the Steering Committee: a body made up of voting representatives from each of the five large utilities in the state and one representative each for the smaller and medium utilities in the northern and southern parts of the state, and non-voting representatives from CARB and the Program Administrator. The Steering Committee was given approval authority for all vendor selections, invoices, and setting the reward amount. The Governance Agreement further stipulated that the Administrator would use third-party implementers to facilitate the program, and that at least one of these implementers would be an audit firm, with no affiliation to any participating utility, to perform annual audits of the program.

The Governance Agreement places additional requirements on the participating utilities, outside of the LCFS Regulation, to set a regular and recurring schedule for the utilities to contribute LCFS credit proceeds to the program. A final version of the CCFR Governance Agreement was filed with the CPUC by SCE in supplemental Advice Letter 4090-E-A on December 20, 2019.

### March 3, 2020

After approval of the Governance Agreement via a disposition from the CPUC Energy Division, the program's implementation began when the five large electric distribution utilities (EDUs), Pacific Gas & Electric, Southern California Edison, Los Angeles Department of Water and Power, San Diego Gas and Electric, and Sacramento Municipal Utility District, executed the Statewide Clean Fuel Reward Governance Agreement. Shortly thereafter, the governing Steering Committee was formed with representatives of the large five EDUs as well as representatives of the Northern and Southern publicly owned utilities (POUs). This enabled the program to develop and issue requests for third-party implementer proposals and establish a program funds account to receive and hold utility deposits.

### November 17, 2020

After two years of collaboration with CARB, the CPUC, and electric utilities throughout the state, the CCFR program was officially launched on November 17, 2020, providing an instant reward of up to \$1,500 at the point of sale for the purchase of an eligible new plug-in light-duty vehicle at a participating retailer. Quick speed-to-market was required to aid consumers in a time of increasing financial need during the COVID-19 pandemic.

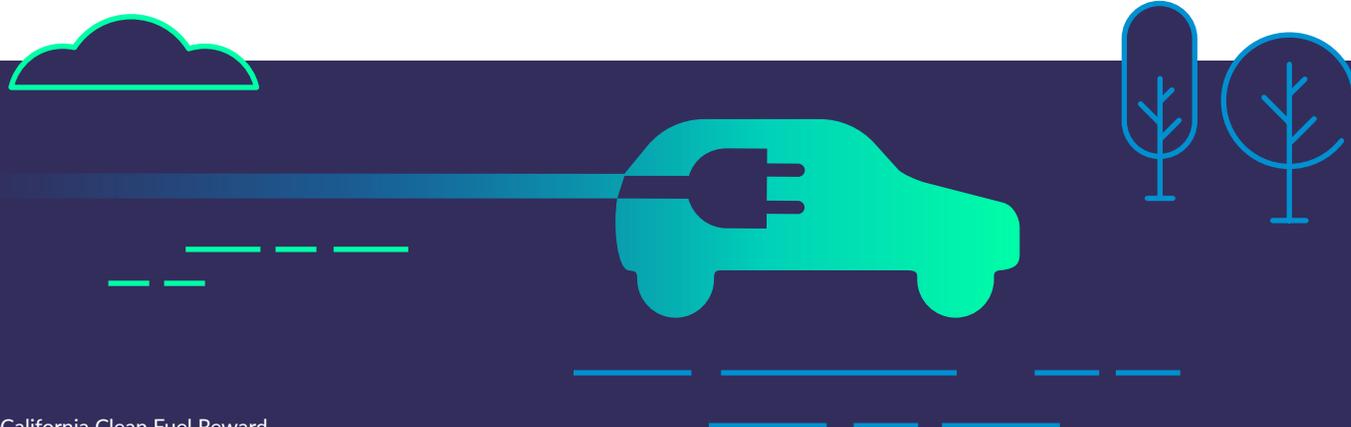
### November 11, 2021

2021 presented challenges to the CCFR that were working in opposition: general travel continued to be depressed, which both reduced the amount of LCFS credits being generated by electric vehicle charging and the demand for LCFS credits to offset the sale of more carbon-intense fuels (a reduction in program revenues), yet consumer demand for new electric vehicles was higher than anticipated by most market analysts.

The result was that the program experienced an apparent cash flow shortfall that required changes be made to keep the program within its statutory obligations and to ensure a stable reward amount for future customers. So, the CCFR Steering Committee approved a reduction of the maximum reward amount from \$1,500 to \$750. This date was chosen to align with the first day of the November automotive sales cycle.

### August 1, 2022

Due to the increasing popularity of electric vehicles and higher than estimated growth of electric vehicle sales in California, CCFR's goal of sustainably maintaining a robust and consequential reward amount was severely challenged. Rapid growth in EV sales drew down reward funds more quickly than expected, leaving less revenue than initially estimated from the sale of LCFS credits, while the program still maintained a legal obligation to retain at least \$10 million in program funds in reserve. As such, the Steering Committee approved a temporary reduction of the reward amount to \$0.



## CCFR GUIDING PRINCIPLES

SCE's Advice Letter 3982-E from April 2019 laid out a set of 12 guiding principles for the CCFR that SCE and the other utilities continue to rely on when making programmatic decisions

- 1 Accelerate the sale of plug-in electric vehicles (PEVs) with an instant reduction in price to all PEV purchases in California at the point of sale or lease
- 2 Mitigate the risk of a wait list or program insolvency.
- 3 Maximize the CCFR, including by stacking the CCFR with other state, local, and federal incentives, while minimizing the amount of LCFS revenue expended on administration and marketing.
- 4 Implement the program consistent with an equity-based framework, consistent with CARB direction.
- 5 Maximize dealer (retailer) participation.
- 6 Promote transparency to all vested stakeholders by, among other things, publishing the CCFR amount at the time of sale.
- 7 Provide continuity, certainty, and simplicity in the CCFR program for California's PEV purchasers and minimize changes to the CCFR amount.
- 8 Launch the program as soon as possible by ensuring sufficient, fair, and timely contributions for startup costs using existing LCFS funds.
- 9 Facilitate the collection of data on PEV sales in the state for grid planning, rate enrollment, and other good utility practices.
- 10 Create a Steering Committee of utilities with appropriate decision-making authority and create a supporting advisory committee comprised of stakeholders.
- 11 Develop robust risk mitigation and fraud management policies.
- 12 Support utility cobranding and marketing of the statewide program, as well as complementary utility-specific programs.

The following sections of this report provide detail and insight regarding the implementation of the CCFR program, a presentation of program results during calendar year 2022, an overview of the new initiatives and resources launched, and a discussion of lessons learned and opportunities for continued improvement.

**02**

# **IMPLEMENTATION**

## 02 IMPLEMENTATION

### MARKETING, EDUCATION, AND OUTREACH

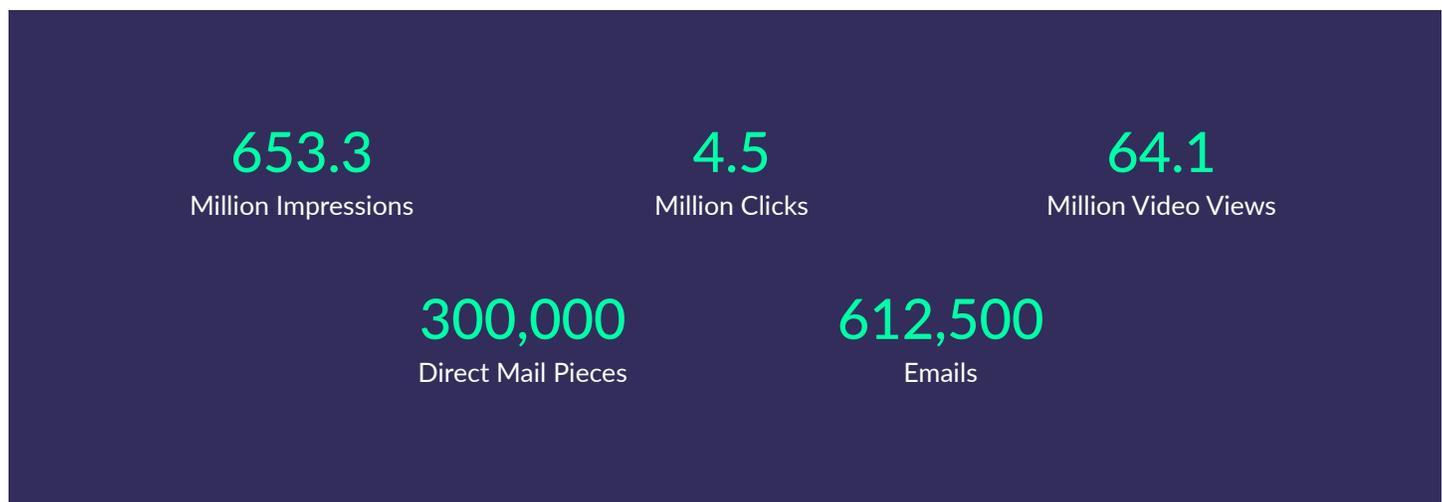
#### Consumer Outreach

Building on the success of the program's first year of consumer outreach in 2021, several key learnings were implemented to enhance outreach efforts in 2022. The theme of 2021's investment allocation was seasonality—concentrating efforts at peak automotive sales periods and key events specific to electric vehicles and environmental awareness. In 2022, the theme shifted to consistency—allocating investment with even distribution throughout the year to minimize fluctuations in cost.

Persona-tailored outreach was also a larger focus in 2022. Personas are fictional characters representing target customer groups and are used to personalize marketing and outreach efforts. The five unique personas that comprised the outreach efforts for CCFR were segmented by their primary reasons for considering an electric vehicle. Adding to the unique messaging for each audience that was already in place from 2021, in 2022 customized strategies were applied to reach each persona with tactics that showed the highest engagement from that particular audience.

#### Outreach Results:

In 2022, the CCFR consumer marketing campaign achieved:



#### Adjusting for the Temporary Reward Reduction

In August of 2022, the consumer outreach plan was adjusted to support the program shift during the temporary reward reduction period. In support of the original project scope and statement of work, and with the support of the retailer network, outreach efforts necessarily pivoted from driving consumer *awareness* of the CCFR program to promoting consumer *education* on electric vehicle purchase and ownership, including information on EDU rate programs, links to EDU fuel savings calculators, industry resources, charger maps, fact sheets, and more. Following the temporary reward reduction, August through December also marked a wind-down phase, with reduced outreach tactics and scaled-down investment.



## Community Partner Outreach Pilot

To reach the level of EV adoption necessary to achieve California’s carbon neutrality goals, all customers and communities must be considered in developing and implementing marketing, engagement, and outreach efforts. Underserved communities, also known as equity audiences, are one of the most critical segments within this equation. These audiences face several unique challenges when it comes to EV adoption, and to date, traditional marketing efforts have not been effective in reaching and driving EV adoption within this segment.

In the first quarter of calendar year 2021, the CCFR Equity Advisory Group presented an opportunity to the Steering Committee to implement a pilot that would evaluate multiple engagement and outreach activities in underserved communities. This pilot would focus on driving awareness and education for both EVs and CCFR. The pilot’s purpose was to collect a deeper level of insight around the EV adoption challenges faced by these communities and identify the most effective ways to engage them and drive EV adoption moving forward.

The six-month pilot launched on November 21, 2022, and operated in the regions that contain 96% of California’s disadvantaged community census tracts (San Joaquin Valley, Inland Empire, and Los Angeles). Community partners in these areas used a mix of social media, live events, surveys, phone banks, and customer advocates to educate their communities about EVs and the CCFR program and to drive awareness and consideration.

Although the pilot faced significant challenges due to the auto industry’s limited vehicle inventory supply, the pilot succeeded in achieving its education, awareness, and consideration goals. The learnings identified through analysis of the pilot’s engagement data validate the niche, one-to-one, community-driven outreach approach as highly effective in engaging underserved communities. The pilot also provided CCFR with valuable insights that can be used to further refine future engagement within underserved communities. See section 05, Learnings and Opportunities, for additional information on key learnings from the pilot program.

### Pilot Goals and Objectives

#### Goals

The following goals were identified for the pilot program:

- **Awareness and Education** – Engage, educate, and drive awareness of the benefits of EV ownership and the CCFR program within equity segments.
- **Consideration** – Increase consideration of EV ownership and/or purchasing or leasing a CCFR-eligible vehicle.
- **Generate Insights** – Collect data, feedback, and insights to help better understand equity audience EV support needs, refine message relevancy, and ensure engagement is delivered in ways the audience feels are authentic.
- **Informed Recommendation** – Based on pilot engagement data and insights, provide an informed recommendation for a potential statewide equity outreach and engagement program.

## Objectives

The following objectives were identified to build a framework that helps evaluate the impact of various engagement activities and collects insights to refine and improve future engagement initiatives with equity audiences:

- Engage equity audiences in two-way conversations about the benefits of EV ownership, the CCFR opportunity, and their support needs, as they relate to EVs.
- Generate insights that help refine and improve future engagement initiatives with equity audiences.
  - Identify the most effective tactics and platforms for reaching these audiences.
  - Identify the most effective messaging for driving audience engagement.
  - Identify the most effective tools and resources that enable these audiences to continue their EV purchase/lease interest after engaging with the pilot.
  - Identify specific audience needs as they relate to leasing/purchasing an EV.
- Develop a deeper understanding of the differences between equity audiences and general consumer audiences as they relate to EVs.
- Validate the effectiveness of the pilot's framework in reaching the right equity audiences, driving awareness, education, and consideration.
  - Increase audience understanding of the benefits of EV ownership.
  - Increase audience awareness of CCFR.
  - Increase audience purchase/lease consideration for EVs and CCFR.



## Community Partner Organizations

Understanding, trust, and authenticity are critical factors in driving successful engagement with equity audiences. For this reason, community partner organizations were the central element driving the design, implementation, and measurement of the pilot outreach and engagement initiatives. They know the unique challenges equity audiences face and how to engage them in authentic ways that resonate, because they do it 365 days a year. The community partner organizations involved with the pilot included:



### VALLEY CLEAN AIR NOW

*Lead Community Partner Agency and San Joaquin Valley Outreach Partner*

A 501(c)(3) public charity committed to quantifiably reducing air emissions in California's San Joaquin Valley, the region with the worst air quality in the United States. Valley CAN served two roles in the pilot: coordinating and managing all community partner pilot outreach activities and engaging the underserved rural community in the San Joaquin Valley.

#### Additional Partner Information



### REDEEMER COMMUNITY PARTNERSHIP

*Los Angeles County Outreach*

A 501(c)(3) nonprofit Christian community development corporation that has been working in the Exposition Park neighborhood in South Los Angeles since 1992 to create a safe, healthy, opportunity-rich community where children, youth, and their families thrive. Their focus is on creating a network of programs and partners that will support the children in their neighborhoods from birth to college and career.

#### Additional Partner Information



### LIBERTY HILL FOUNDATION

*Los Angeles County Outreach Partner*

Liberty Hill Foundation is a laboratory for social change philanthropy. They leverage the power of community organizers, donor activists, and allies to advance social justice through strategic investment in grants, leadership training, and campaigns. As a public foundation, Liberty Hill Foundation provides critical support for social justice campaigns, and as a nonprofit, they lead research and policy initiatives designed to drive systemic change.

#### Additional Partner Information



### LATINO AND LATINA ROUNDTABLE

*Inland Empire Outreach Partner*

The Latino and Latina Roundtable of the San Gabriel and Pomona Valley works to improve quality of life and socioeconomic justice for the Latinx community and those facing inequities through advancing education, leadership development, and civic participation.

#### Additional Partner Information

## Outreach Elements

CPOP’s community partners leveraged their existing social media channels, websites, people, and events to promote CCFR to potential new car buyers in their communities and encouraged them to visit their websites to learn more.

### Community Partner Social Media Posts

Weekly organic and boosted postings on community partner Facebook Pages were designed to educate low-income, disadvantaged, and underserved communities about EVs and drive interest in the CCFR program and consideration for purchasing/leasing EVs.

- [Valley CAN Facebook Page](#)
- [Redeemer Community Partnership Facebook Page](#)
- [Latino and Latina Roundtable of the San Gabriel and Pomona Valley Facebook Page](#)

**EMPOWER**

**Are you interested in an electric vehicle?**

CA residents can receive up to **\$14,750+** from CA state programs towards a new EV by combining incentives.

NEW CARS	USED CARS
California Clean Fuel Rebate (CCFR).....\$750	Drive Clean in the San Joaquin (Replace).....\$9,500
Clean Vehicle Rebate Program (CVRP).....\$4,500	SCE Pre-Owned EV Rebate.....\$1,000
Increased rebate for low income.....\$2,500	Increased rebate for low income.....\$3,000
Drive Clean in the San Joaquin (Rebate).....\$3,000	<b>Total: \$13,500 towards new BEV</b>
Drive Clean in the San Joaquin (Replace).....\$9,500	
<b>Total: \$14,750 towards new BEV</b>	

Call our EV benefits team:  
Monday - Friday  
8:30am to 5:00pm  
evbenefits@valleycan.org  
(559) 404-0255

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**EMPOWER**

**¿Te interesa saber más sobre los Vehículos eléctricos?**

Los vehículos eléctricos pueden ayudar a mejorar la calidad del aire en nuestras comunidades.

Al usar un vehículo eléctrico tu familia y tú ahorran en gastos de gasolina y costos de mantenimiento.

Si vives en California puedes recibir hasta **\$14,750+** combinando distintos programas de beneficios para comprar un vehículo eléctrico.

Lláma, Mandá Texto O Correo Electrónico A:  
Martha Lozano  
martha@redeemercp.org  
(323) 337-6950  
Lunes a Viernes De 9 AM a 5 PM

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**EMPOWER**

**Are you interested in an electric vehicle?**

EVs can help improve the air quality in our Valley communities.

Owning an EV can save families money on gas and maintenance costs.

CA residents can receive **\$14,750+** from CA state programs towards a new EV by combining incentives.

Call our Valley CAN EV Team!  
Monday - Friday  
8:30 am - 5:00 pm  
(559) 404-0255  
EVbenefits@valleycan.org



**Community Partner Facebook Live Events**

Biweekly Facebook Live events hosted by community partners engaged communities in informational, two-way conversations about topics that alternated between EV education, benefits of EV ownership, EV shopping, finance, and purchasing. Broadcasts were conducted in both English and Spanish.



**Live In-Person Events**

Valley CAN created and staffed a CCFR-branded booth at six Tune In & Tune Up events in the San Joaquin Valley. These events took place on Saturdays and typically hosted 350 to 500 low-income disadvantaged community drivers. Trained community partner Customer Advocates engaged attendees face to face with both general EV and CCFR informational materials, as well as answering attendee questions. Customer Advocates also provided attendees with access to the online Stage 1 Survey and assisted them in completing the survey.

**Stage 1 Survey**

Community Partner social media posts and live event activities prompted community members to visit their websites to learn more about EVs and CCFR, and then invited them to complete an optional online survey. These surveys, or intake forms, collected demographic, purchase intent, and EV knowledge information from those we engaged.

**Stage 2 Survey**

Customer Advocates made follow-up calls to those who requested additional information in the online survey. During these calls, Customer Advocates asked and documented responses to specific questions to help identify those who were interested in buying or leasing now or in the future.

**Stage 3 Survey**

Customers who identified themselves as “ready to purchase an EV now” during the Stage 2 calls received an additional follow-up call a few days later. Customer Advocates used this point of contact to identify the information and support that these customers needed in order to find and purchase the EV that they wanted.

**Community Partner Phone Bank**

Community partner Customer Advocates provided additional support by hosting a phone bank that took incoming calls from those engaged by the pilot to answer questions about EVs and CCFR. They also made outbound calls to those who requested follow-up information and contact at various phases of the engagement.

**Engagement Results**

Here are the engagement and outreach numbers achieved by CPOP from November 29, 2021, through May 14, 2022.

**Facebook Post Engagement**

A sustained Facebook social media engagement plan implemented by all three community partners drove significant engagement with targeted audiences.

Posting Weeks	Total Reach	Impressions	Post Engagement	Video Plays	Reactions
December 5, 2021 – May 5, 2022	1,873,897	2,354,793	171,976	286,494	18,826

**Facebook Live Events Engagement**

The 15 Facebook Live events hosted by community partners delivered the pilot’s largest volume of engagement.

**174,221**  
Reach

**122,467**  
Views

## In-Person Event Engagement

Nine live, in-person events were conducted by Valley CAN over a 15-week period from January to May 2022. These events engaged a total of 2,411 individuals. State and local COVID-19 protocols significantly limited advocate engagement with participants.

### Survey Engagement

922

Total Stage 1  
Survey Completions

196

Total Stage 2  
Survey Completions

33

Total Stage 3  
Survey Completions

### Phone Bank Phone Bank Engagement

1,777

Total number of inbound calls received  
by the pilot phone bank

993

Total number of unique inbound phone  
numbers that contacted the pilot phone bank

## CPOP Recommendations

At the conclusion of the CPOP, the pilot team developed a report included in Appendix C and made several informed recommendations for expanding EV engagement and outreach activities in underserved communities beyond the pilot program. These results will serve to inform the design of future iterations of the CCFR program when a reward amount is restored and when regulatory parameters enable program features to be dedicated to specifically addressing the needs of underserved communities and individuals.

## Education and Training

In 2022, the CCFR training team continued to build upon the three main objectives from 2021:

- Secure retailer enrollments
- Create multimodal learning solutions for retailers
- Educate retailer sales teams on EVs to improve sales

As the number of new entrants into the EV market became fewer, the need to secure retailer enrollments became less of a focus in 2022, leaving the remaining two objectives as the central aims. Multimodal, or blended, learning continued through a combination of onsite visits, virtual touchpoints, and text message communications. The education of retailer sales teams became an increasingly important focal point during 2022, and a new approach to support the effort was created. Retailer communications were enhanced through the delivery of a monthly CCFR newsletter, with content that supported training goals and the CCFR program overall.

Due to changes in state and local COVID-19 protocols, 2022 also signaled an end to the CCFR consultant teams' virtual-only status, and the beginning of onsite retailer meetings. The CCFR consultant team expanded to nine individuals, adding three new consultants to maximize the quality and quantity of retailer touchpoints. Each consultant's territory included approximately 180 retailers.

Retailer training and consulting in 2022 were rich in data pertaining to program performance, EV website presence, consumer feedback on purchase influence, or sales team knowledge, and more. The approach focused on three areas:

- Program performance metrics
- Website and search analysis
- EV education for retailer sales teams

### **Program Performance Metrics**

Using the program dashboard, CCFR consultants advised retailers on program performance, highlighting their challenges around outstanding claims, number of days to submit program claims, sales-to-claims ratios, and rejection and return rates. The goal was to help the retailers perfect their program performance by improving the processes to handle claims and get paid in the most efficient way possible.

Two new powerful tools came into play during these retailer meetings: The New Area Comparison Tool allowed consultants to compare individual retailer performance to their parent OEM brand and to other retailers in a specified radius. In addition, consumer survey data offered an evaluation of their retail experience from the point of view of customers who received the CCFR reward during their interaction. This data included a rating of the overall purchase experience and specific questions related to EV knowledge during the sales interaction.

### **Website and Search Analysis**

An analysis of retailer website and search interactions, conducted by Maritz Automotive, continued to be a valuable resource during the consultants' onsite interactions. The analysis reviewed website content (i.e., does the site have EV content that will drive relevant traffic searching for related EV terms and questions?), CCFR branding (including a spot check for the correct reward amount), and search engine performance (i.e., how does the site rank in Google, how likely are shoppers to see the site when searching for EVs in the area, and how well does the site perform in both organic and paid search?). In total, 1,043 website and search analysis reports were delivered as of December 2022, with an overflow of reports scheduled to be delivered in the first quarter of 2023.

### **EV Education for Sales Teams**

A key focus during the 2022 consultant visits was on EV education for retail teams, geared toward enhancing sales consultant and business development center (BDC) personnel conversations on the topics that are important to today's EV buyer: total cost of ownership (TCO), charging, warranty, roadside service, OEM apps, incentives, local EDU rate plans, etc.

The training team developed two new deliverables to support this objective. The EV Education Checklist for Sales Teams provides a listing of all the topics that sales/BDC members should address before, during, and after the sales process. The Helpful QR Codes job aid provides a list of important websites, many of which also have mobile apps. Using the QR codes in the job aid, sales and BDC teams can save these websites to their mobile device or laptop for quick retrieval during customer conversations

## 2022 Training Highlights

1,580

Onsite Meetings with Retailers

658

Virtual Retailer Meetings  
Conducted

2

New Job Aids Created to Enhance  
Retailer Education

36%

Open Rate of CCFR  
Monthly Newsletter

82%

Opt-In Text Message Enrollment  
Increase in the Platform for  
Program News and Updates

101%

Opt-In Text Message Enrollment  
Increase for EV Sales Tips

## Retailer Surveys

At the end of February 2022, CCFR completed its first retailer-focused survey, to evaluate the overall effectiveness of the program from the retailer perspective, while gaining suggestions and preferences for future improvements. Rated categories included training, program support, marketing materials, etc.

## Survey Engagement

3,169

Survey Invitations Sent via Email

191

Surveys Completed  
(6% Response Rate)

11

Additional Surveys Completed  
via Link on the Retailer Portal

About 75% of the retailers responding are **very familiar** with CCFR, which complements the customer survey results (see below), showing that retailers are informing their customers about CCFR. Of the retailers familiar with the program, two out of three submit claims for the program for either a single or multiple retailer location.

Most retailers reported that the program is **excellent**.

70%

Strongly Agree

88%

Agree or Strongly Agree

Of five statements measuring the achievement of program objectives, all received **positive average ratings**, including:

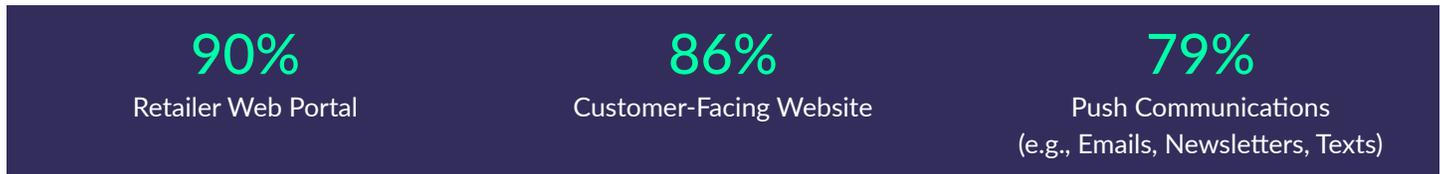
68%

CCFR Helps My Dealership Sell More EVs

77%

The Program Helps Encourage Customers to Consider  
an Electric Vehicle Over Another Vehicle Type

Likewise, retailers are very happy with the program tools that are available to them, rating them as *highly valuable*:



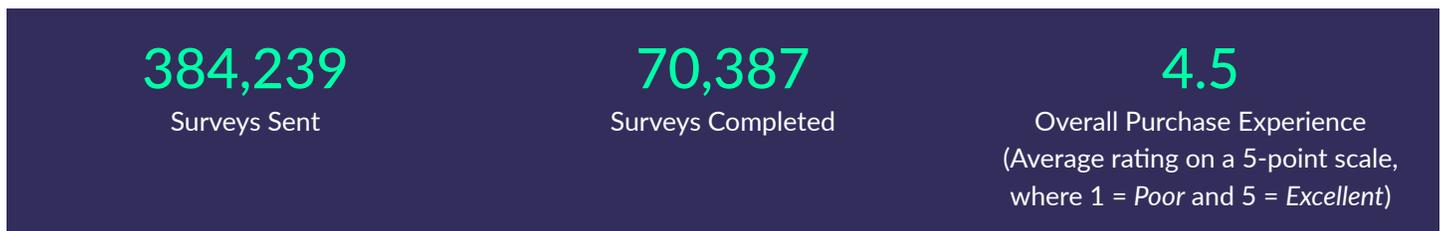
Finally, the retailer surveys produced key follow-up recommendations in support of improving the program, split into two categories: Core Communications and Key Opportunities. These will be detailed in the Learnings and Opportunities section of this report.

## Customer Surveys

The post-purchase customer survey continued to be a valuable opportunity to collect useful information from recent EV buyers who received the California Clean Fuel Reward. The survey responses measure customer satisfaction with their dealership and the CCFR program, as well as factors that influenced their decision to purchase an EV, what vehicles they considered, and charging plans.

2022 was the second full year gathering customer survey results, and they have proven to be very consistent over time. The overall purchase experience has continued to score very highly over the life of the program, with over 65% of respondents giving the program a perfect score.

### Survey Engagement Data as of 12/31/22



## Reason for Vehicle Purchase

Almost 80% of EV buyers replaced another vehicle in their household, and of those, almost 73% replaced a gasoline-powered vehicle. In addition, almost two-thirds of respondents (61.9%) are purchasing or leasing an EV for the first time. More than three quarters of respondents (77.7%) have only one EV in their household. Interestingly, 95.7% of responders have one to two EVs in their household.

## Q2: Reason for new vehicle

Which of the following best describes your new vehicle purchase or lease?

	Reason for new vehicle?	Responses	%
1.	Replacement for another household vehicle	55,943	79.5%
2.	An additional vehicle to my household	11,883	16.9%
3.	First ever vehicle acquired by my household	2,515	3.6%

### Influential Factors

Test Drive (45.2%) and Other EV Owners (45.3%) continued to be the most influential factors for customers when deciding to acquire an EV. The OEM website (28.6%), Third-Party Reviews (28.0%), and Shopping Tools (26.2%) were also valuable influences.

	Responses	Dealer	Electric utility	Employer	News	Nonprofit	OEM website	Online forum	Shopping tools	Other	Other EV owner	Social media	Test drive	3rd party review
Program	70,346	9.3%	15.8%	2.6%	9.4%	1.3%	28.6%	16.7%	26.2%	13.6%	45.3%	14.6%	45.2%	28.0%

Across all factors measured on a 5-point scale (where 5 = extremely important), Fuel Costs (4.4) and Vehicle Performance (4.4) were the most influential, with Environmental Impact (4.3) close behind.

	Responses	Money overall	Fuel costs	Environmental impact	HOV Lanes	Parking incentives
Program	70,346	4.1	4.4	4.3	3.3	2.6

	Responses	Vehicle performance	Vehicle style / comfort	Latest tech	Knowledgeable dealer	Rental / Share
Program	70,346	4.4	4.2	3.9	2.8	1.9

Financial incentives also played an influential role in a customer’s decision to acquire an EV, with CCFR, CVRP (Clean Vehicle Rebate Project), and Federal Tax Incentives all scoring 3.8.

	Responses	CCFR	CVRP	Fed Tax	OEM / Dealer	Other Local
Program	70,346	3.8	3.8	3.8	3.2	2.7

### EV Lifestyle

Almost 86% of respondents charge their EV at home, and almost 33% (32.6%) have solar panels that produce energy at their residence. Over one-third (36.5%) have the option to charge at their workplace, 18.8% for free, and 17.7% for a fee. Almost half of respondents (47.3%) drive 20 miles or less each day for work. Just 7.6% drive more than 80 miles for work. 71.0% drive their EV up to 20 miles for non-work each day.



## Most Notable Changes Comparing 2021 to 2022 Results

### Influential Factors

The *Dealer* (10.3% vs. 8%) and taking a *Test Drive* (48.2% vs. 41.0%) had a higher influential impact for EV buyers in 2021 vs. 2022. Buyers also used more *Online Shopping Tools* in 2022 to influence their decision to acquire an EV (24.6% in 2021 vs. 28.5% in 2022).

### Search Process

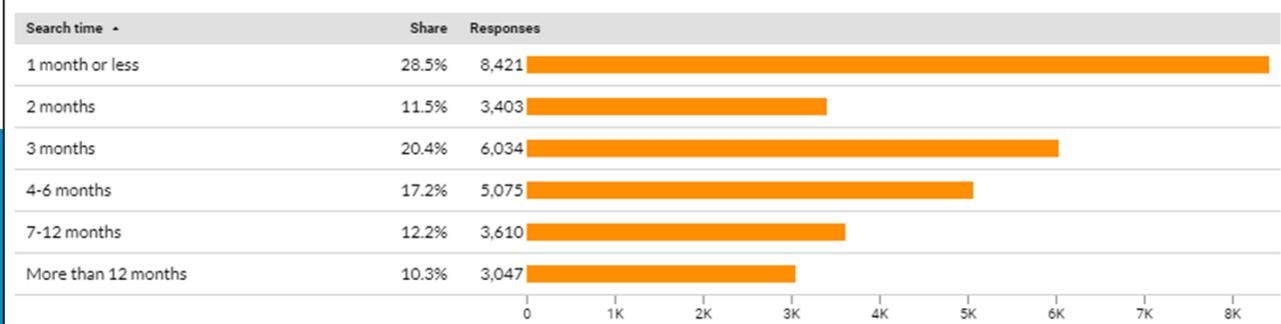
In 2022, buyers took longer to search for vehicle information and/or visit a retailer before they made their EV purchase vs. 2021:

- 33.8% took one month or less to purchase in 2021 vs. 28.5% in 2022
- Most notable is the increase in buyers taking 7 to 12 months and more than 12 months to search in 2022

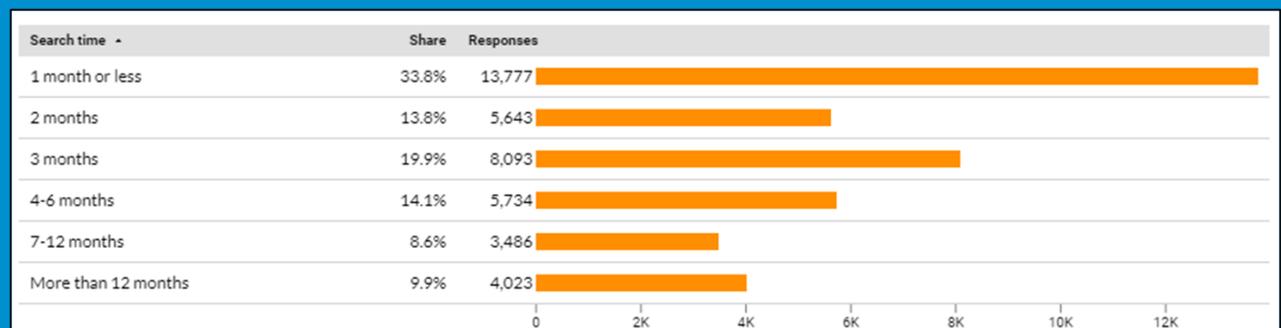
## 2022

### Q10: Search Process

How long was your search process, from the time you began searching for vehicle information and/or visiting a dealership until you made your EV purchase?



## 2021



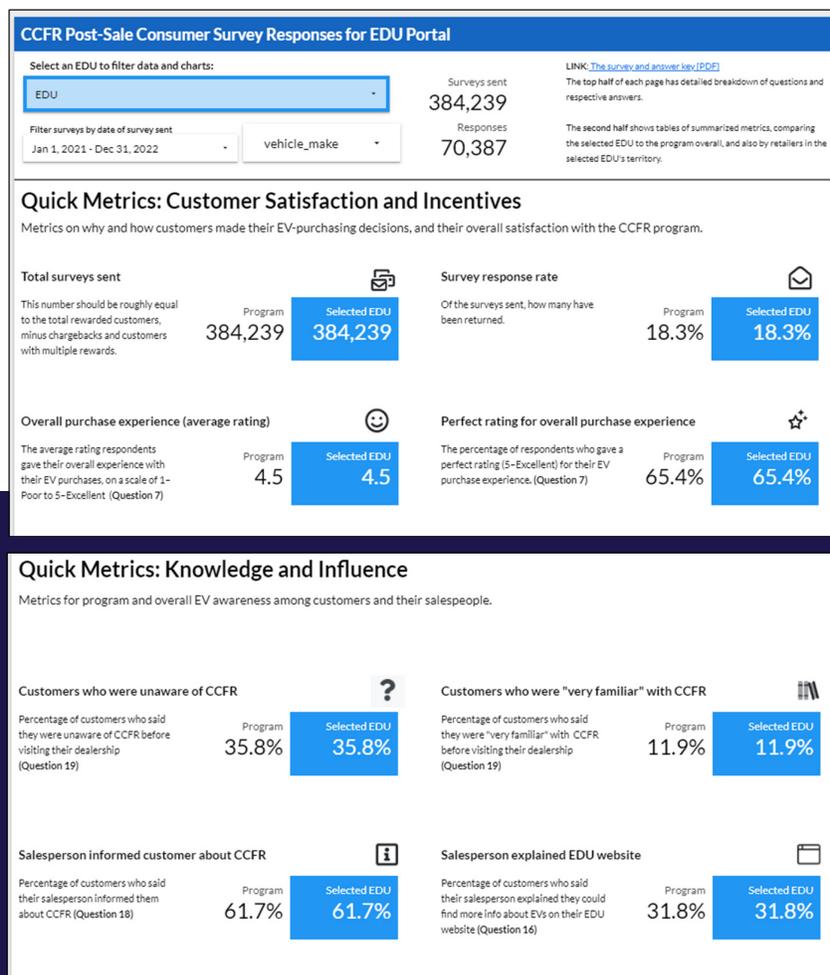
## Participating Electric Distribution Utilities Support

The involvement of and partnership with the EDUs in California continued to grow in 2022. The three objectives in 2021 were supported and enhanced in 2022:

- Provide information about the participating EDUs to customers and retailers who visit the CCFR website
- Connect the customer with their EDU after purchasing/leasing an eligible vehicle and receiving the reward
- Empower EDUs to seamlessly continue building a relationship with EV customers and retailers in their territories

## EDU Customer Survey Results Dashboard

A new customer survey results dashboard was added to the EDU portal, providing EDUs with the ability to see aggregated survey results, filter by their EDU and date range, compare their results vs. the program, and view Quick Metrics that highlight results in Customer Satisfaction and Incentives, as well as Knowledge and Influential Factors.



## Retailer Customer Education Flyer

The Retailer Customer Education Flyer was updated in Q4 2022 and made available to all enrolled retailers to download from their portal and provide to their customers at the time of sale. The enhanced updates encourage customers to visit the CCFR website after purchase, highlighting their EDU's EV support programs, even though the reward is temporarily reduced. The flyer is available in English, Spanish, and Chinese.

## TEMPORARY REWARD AMOUNT REDUCTION

### Reward Amount Temporarily Reduced to \$0

A change that significantly affected the program in 2022 was the temporary reduction of the reward amount to \$0. The reward amount reduction was based on the goal to sustainably maintain a robust and consequential reward amount, which was challenged by several factors, including:

- Higher than estimated growth of electric vehicle sales in California, which drew down reward funds more quickly than expected
- Less revenue than initially estimated from the sale of LCFS credits
- The program's legal obligation to maintain at least \$10 million in program funds in reserve

The Steering Committee approved the temporary reduction of the reward to \$0, effective September 1, 2022. To support the requirements of the program and ensure all retailers and stakeholders were aware of the change, a comprehensive communications plan was developed and implemented beginning August 1, 2022, allowing for a 30-day notice.

### *Communications Strategies by Audience Type*

Communications were developed to target three key audience groups including retailers, customers, and key stakeholders.

#### **Retailers**

- Participating retailers were advised about the temporary reward reduction. Their awareness was ensured with ongoing reminders leading up to and after the temporary reward reduction effective date.
- Retailers were provided with details and requirements to be ready for the temporary reward reduction period and were supported with key messaging for their sales teams to relay to their customers.
- Retailers were required to acknowledge on the retailer portal that they were made aware of the temporary reward reduction.
- The retailer portal was redesigned to give easy access to revised job aids as well as the Retailer Consumer Education Flyer.

#### **Customers**

- Customers were made aware of the upcoming temporary reward reduction with clear references on the CCFR website.
- The website was revamped and refocused to highlight EV education and resources. EDU partner content was brought front and center, making it easy for consumers to access valuable utility resources.
- The website presented an easy way for customers to ask questions by providing program headquarters contact information.
- References to the reward amount were removed from consumer marketing in the weeks leading up to the change.
- Third-party websites and incentive stackers similarly removed reward amount references.

#### **Key Stakeholders**

- OEM corporate and field offices were informed of the temporary reward reduction through consistent communications.
- Industry organizations were informed and provided with messaging and FAQs to share with their members.
- EDUs were notified of the temporary reward reduction to ensure their websites were updated to remove reward references.
- Additional stakeholders were informed of the temporary reward reduction, including key partners and third-party sites that were promoting the reward. More than 15 third-party sites were contacted to remove references to CCFR.

While this change was significant, only a limited number of inquiries (fewer than 20) were received from both customers and retailers. Among those inquiries and particularly noteworthy here was the excellent feedback that retailers shared about their consultants with regard to their overall EV education, not merely knowledge shared about the CCFR program.

## OPERATIONS, AUDITING, AND MONITORING

### Operations

Maintaining operational excellence and continuous improvement are the keys to ensuring that the CCFR program runs as efficiently as possible. Ongoing review and analysis of processes and procedures are a core part of the program, and improvements are incorporated as needed. In addition, strategies are developed annually to meet the needs of the program.

2022 continued with high volumes of claim submissions and payments, especially in Q2 (over 85,000 claims paid). A key strategy implemented in 2022 was to continually review staffing plans and allow for greater flexibility to adjust, based on claim volume. In addition, artificial intelligence (AI) functionality was fine-tuned to more accurately identify the need for a second audit of claims, and a process was implemented to prioritize OEM-specific claims during spike periods.

### Auditing

As in 2021, an independent auditor was engaged for the CCFR program to review and assess the continual operating effectiveness of controls that were in place during 2022. In addition to the independent audit, in 2022 SCE's Audit Services Department (ASD) also performed an internal audit of the administrative functions SCE provides. This audit focused on the financial account management, cross-functional programmatic activities, and the follow-up time frame for actions assigned to Maritz from the independent auditor. Both requirements support the CCFR's guiding principle to "develop robust risk mitigation and fraud management policies."

The 2021 Annual Audit Report was developed and distributed in June 2022 and covered activities through December 31, 2021. Specific areas of focus included:

- A review of the retailer enrollment and reevaluation of the enhanced process, including secondary verification of the enrollment
- Retailer reward and reimbursement processes, including secondary verification of claims
- Annual enrollment and claims data validation processes
- Program metric definition, monitoring, and reporting
- Implementer, financial institution, and program administrator billing and invoicing
- Segregation of duties (SOD) and approvals of system access, including semiannual access reviews
- Accuracy and validity of program expenses
- Completeness and existence of account balances
- Omissions (complaints) process

### Monitoring

The program operations team continues to use the feedback in the audit report to refine and improve program processes. The final 2021 Annual Audit Report is included on the CCFR website. The CCFR program will continue to be audited at the end of each fiscal year, with the 2022 annual audit planned for Q1 2023.

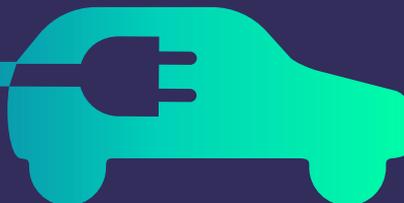
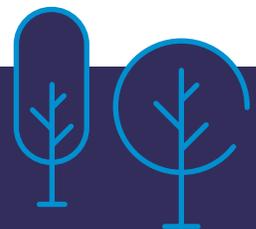
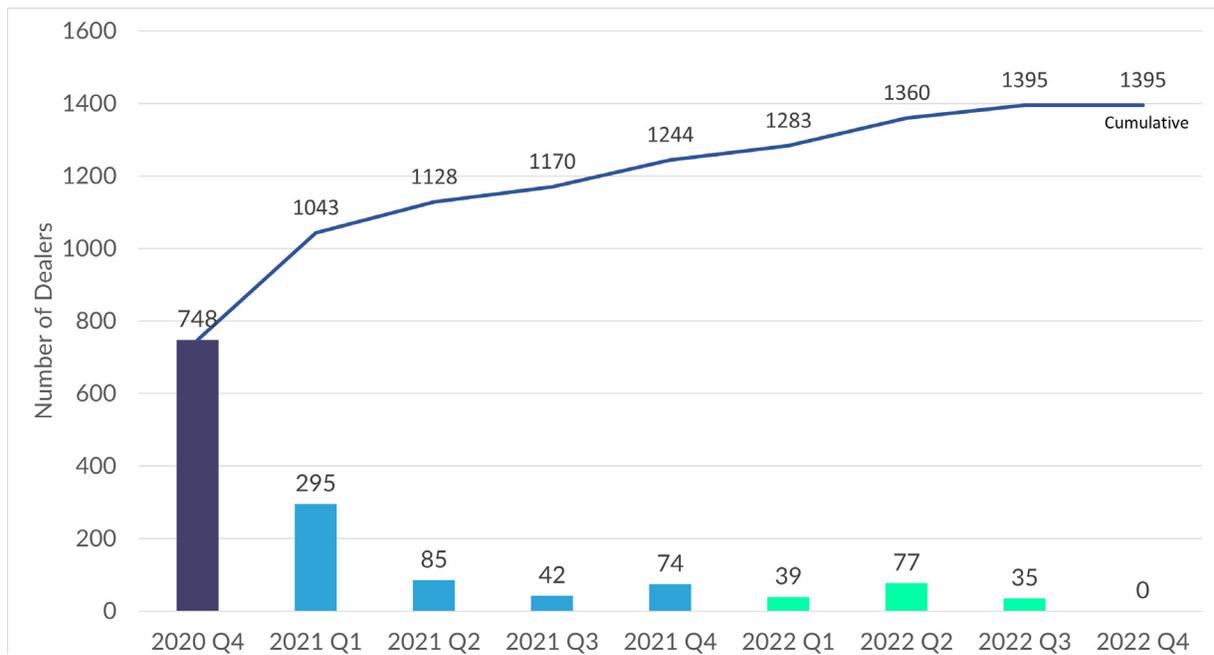
# 03 RESULTS

# 03 RESULTS

Data contained in this report represents activity from program inception through the end of 2022. For current information, please visit [www.cleanfuelreward.com](http://www.cleanfuelreward.com).

## RETAILER ENROLLMENT

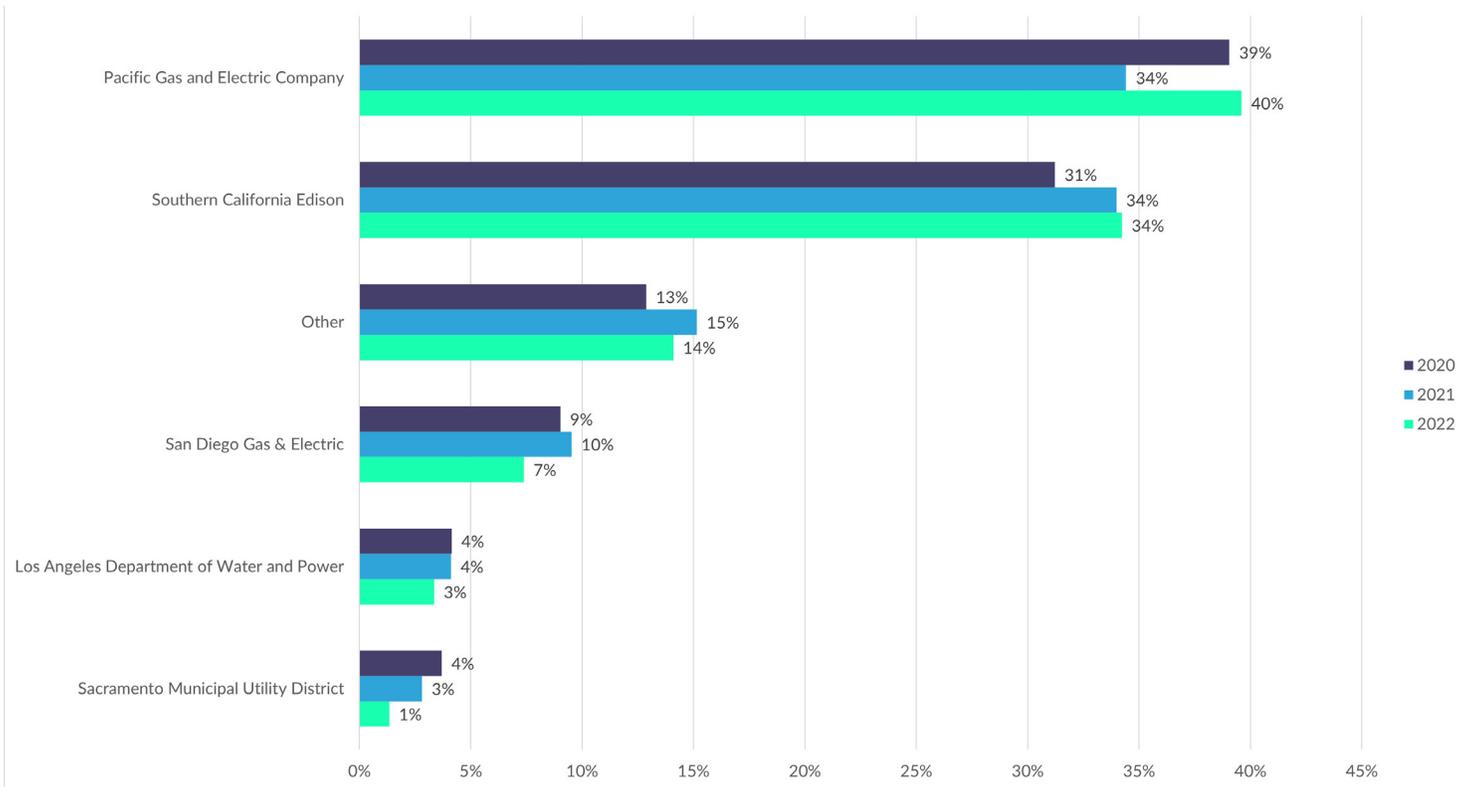
As more retailers enrolled through 2021 into 2022, there were fewer possible enrollment opportunities remaining. Thus, we continue to see reduced counts in each successive quarter following the initial enrollment period. The majority of retailer enrollments—nearly 750—occurred in the first two months of the program. The next highest enrollment counts, 85 and 77 respectively, occurred during the second quarters in 2021 and 2022.





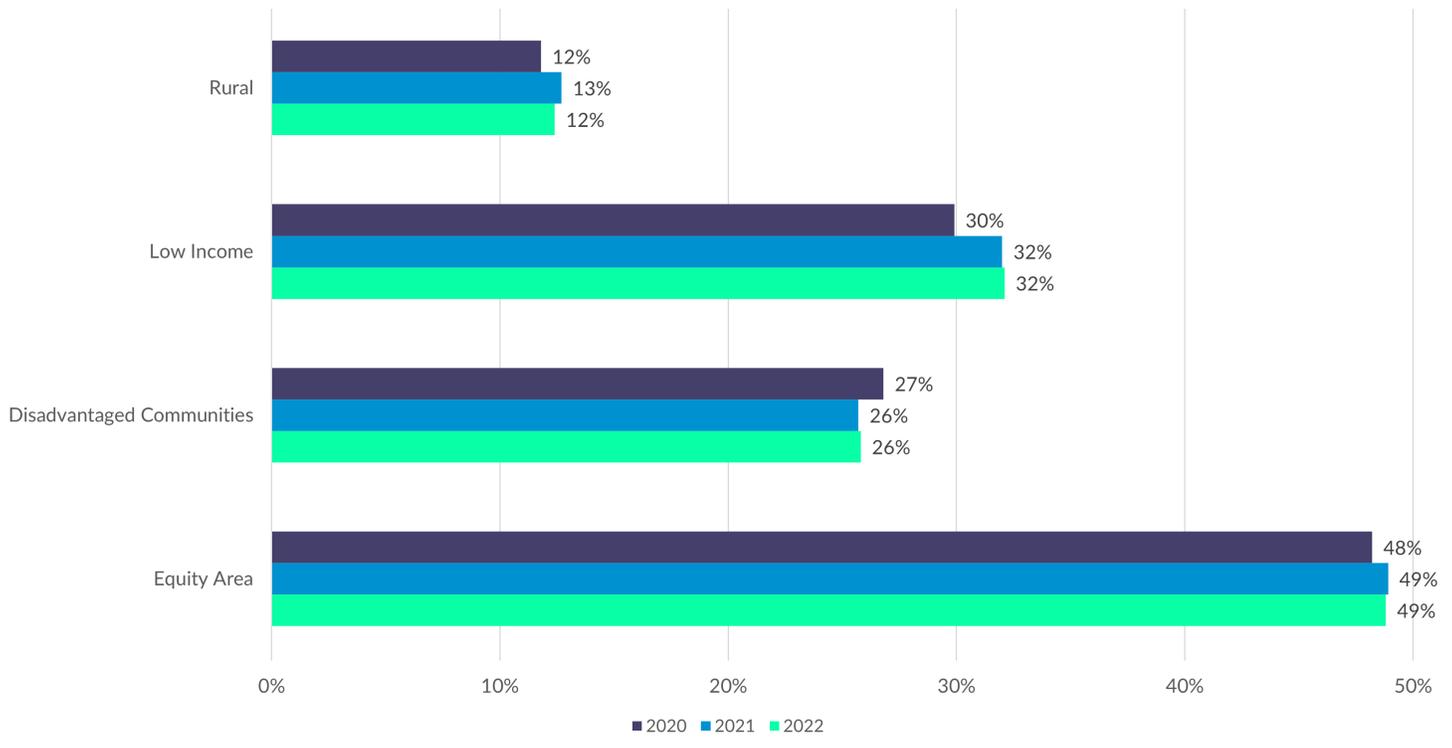
### RETAILER ENROLLMENT BY EDU TERRITORY

To ensure that the CCFR continues to reach retailers in different EDU territories, final tallies for retailer enrollments by EDU remain consistent with the percentages seen at year end 2020 and 2021.



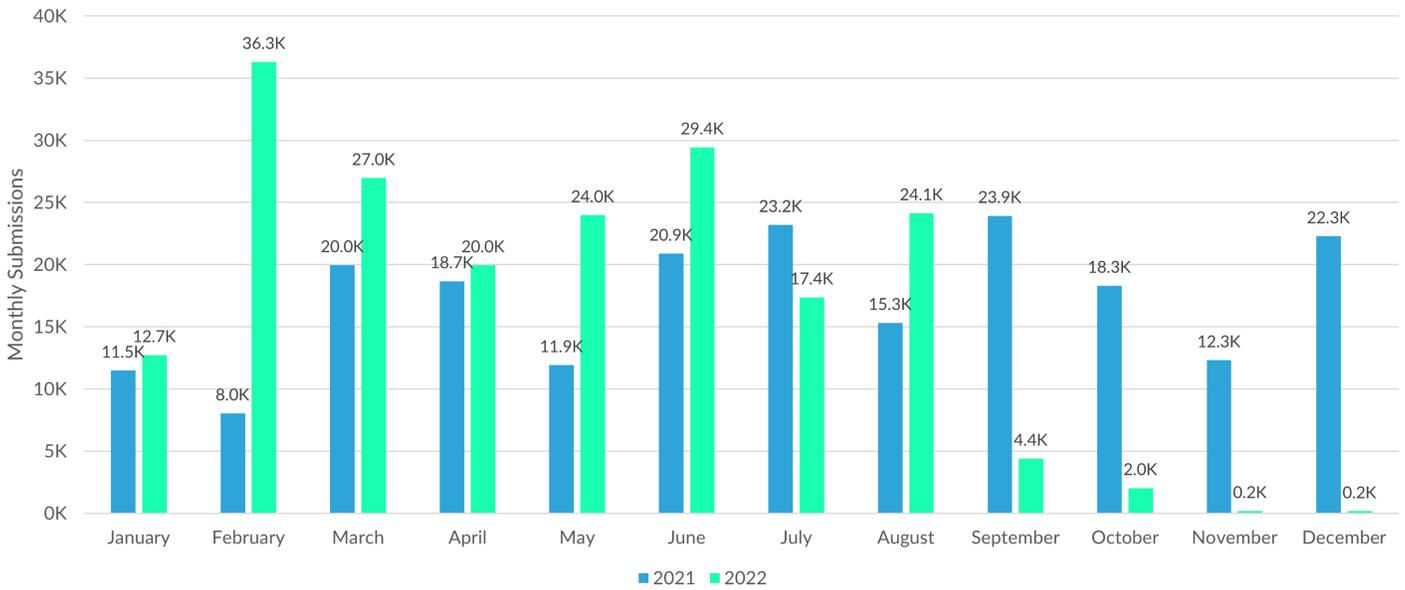
### RETAILER ENROLLMENT DISPERSION IN UNDERSERVED COMMUNITIES

Nearly half of the program’s retailers were enrolled in the first year, 2020. Since then, the distribution of participating retailers across equity areas has remained largely stable through 2022, which saw the addition of another 149 participating retailers. As of December 2022, almost half (49%) of the program’s participating retailers serve equity areas.



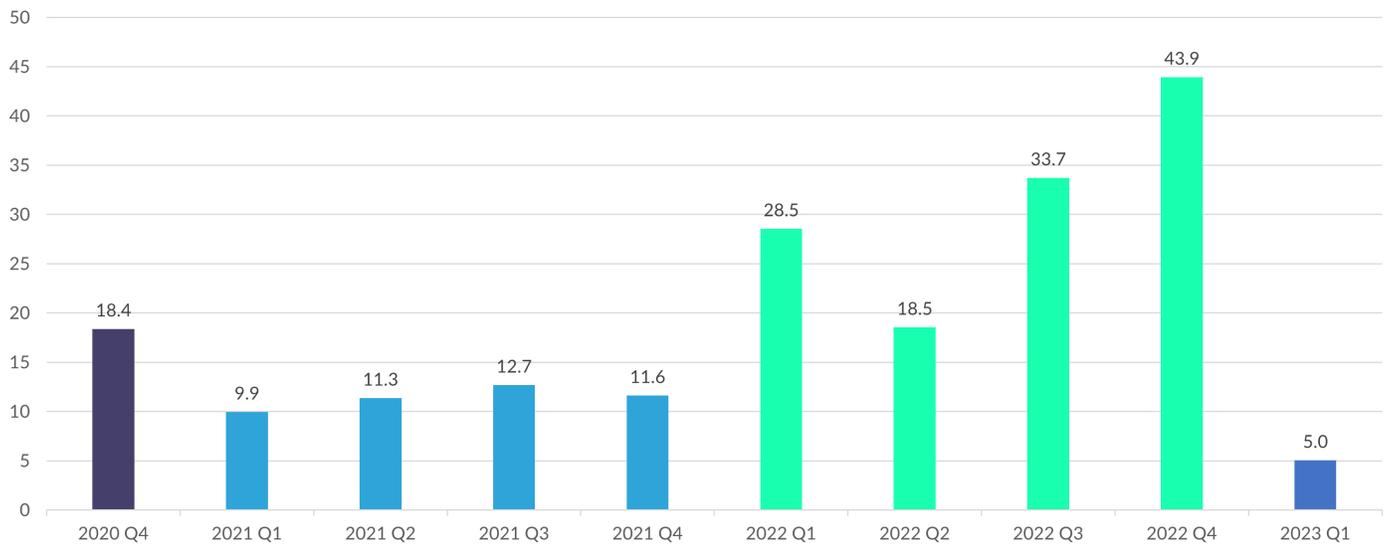
### CUSTOMERS REWARDED: MONTHLY SUBMISSIONS

Submissions increased roughly 90% on average each month for the first half of 2022, showing an increase in availability and program efficacy until the temporary reward reduction was implemented. Processing times grew slightly in the first half with the increased volume.



## CUSTOMERS REWARDED: PROCESSING TIMES

Processing time fluctuated throughout the year, along with volume. 2021 had an average of 12 days to process, which increased in 2022. 2022 had an average of 29 days to process, with the largest increase in days to process in the second half of the year due to the temporary reward reduction. The first half of 2022 had a significant increase in the volume of submissions and averaged 22 days to process.

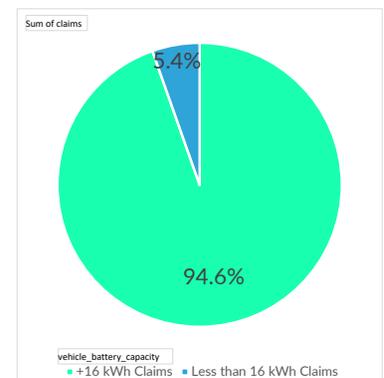
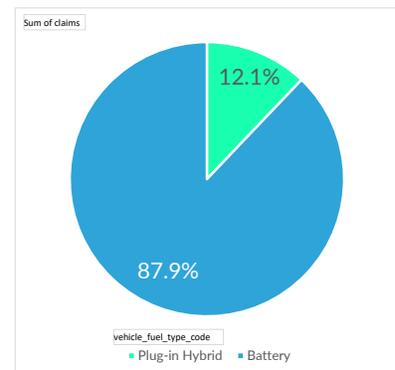


## REWARDS ISSUED BY AUTOMOTIVE MAKE AND MODEL

Although rewards were temporarily reduced to \$0 at the end of August, the volume of rewards in 2022 still reached 97.6% of the 193,000 customers rewarded in 2021. While Tesla's share of the rewards fell from nearly 90% in 2020 to 62% in 2021 it still accounted for the majority of rewards. However, that may have been an anomaly resulting from the fact that retailers from other OEMs had yet to enroll in the CCFR program. In 2022, Tesla's share increased slightly to 67%, but its lowest-selling model—Model X—secured only 3.9% of rewards, nearly equaling the 4.4% share of all Hyundai (the second-highest-share OEM) models combined.

MAKE/ MODEL	REWARDED CUSTOMERS	
Tesla	125,823	66.70%
Model 3	51,055	27.07%
Model S	7,579	4.02%
Model X	7,430	3.94%
Model Y	59,759	31.68%
Hyundai	8,288	4.39%
IONIQ 5	5,558	2.95%
Ioniq Electric	11	0.01%
Ioniq Plug-in Hybrid	290	0.15%
KONA Electric	1,122	0.59%
Kona EV	4	0.00%
SANTA FE Plug-In Hybrid	771	0.41%
TUCSON Plug-in Hybrid	532	0.28%
Ford	6,933	3.68%
Escape Plug-In Hybrid	558	0.30%
F-150 Lightning	228	0.12%
Fusion Energi	2	0.00%
Mustang Mach-E	6,145	3.26%
Kia	6,236	3.31%
EV6	3,119	1.65%
Niro EV	1,868	0.99%
Niro Plug-In Hybrid	650	0.34%
Sorento Plug-In Hybrid	535	0.28%
Sportage Plug-In Hybrid	64	0.03%
BMW	5,997	3.18%
3 Series	1,156	0.61%
5 Series	876	0.46%
7 Series	27	0.01%
CE	19	0.01%
i3	10	0.01%
i4	1,163	0.62%
iX	604	0.32%
X5	2,142	1.14%
Volvo	4,843	2.57%
C40	451	0.24%
S60	247	0.13%
S90	7	0.00%
V60	21	0.01%
XC40	597	0.32%
XC60	1,187	0.63%
XC90	2,333	1.24%
Audi	4,392	2.33%
A7	2	0.00%
e-tron	2,092	1.11%
e-tron GT	500	0.27%
e-tron S	109	0.06%
e-tron S Sportback	56	0.03%
e-tron Sportback	747	0.40%
Q4 e-tron	29	0.02%
Q5	756	0.40%
RS e-tron GT	101	0.05%
Toyota	4,379	2.32%
bZ4X	95	0.05%
Prius Prime	1,976	1.05%
RAV4 Prime	2,308	1.22%
Jeep	4,304	2.28%
Wrangler Unlimited	4,304	2.28%
Chevrolet	4,267	2.26%
Bolt EUV	3,124	1.66%
Bolt EV	1,143	0.61%
Volkswagen	2,586	1.37%
ID.4	2,586	1.37%
Nissan	2,369	1.26%
LEAF	2,369	1.26%

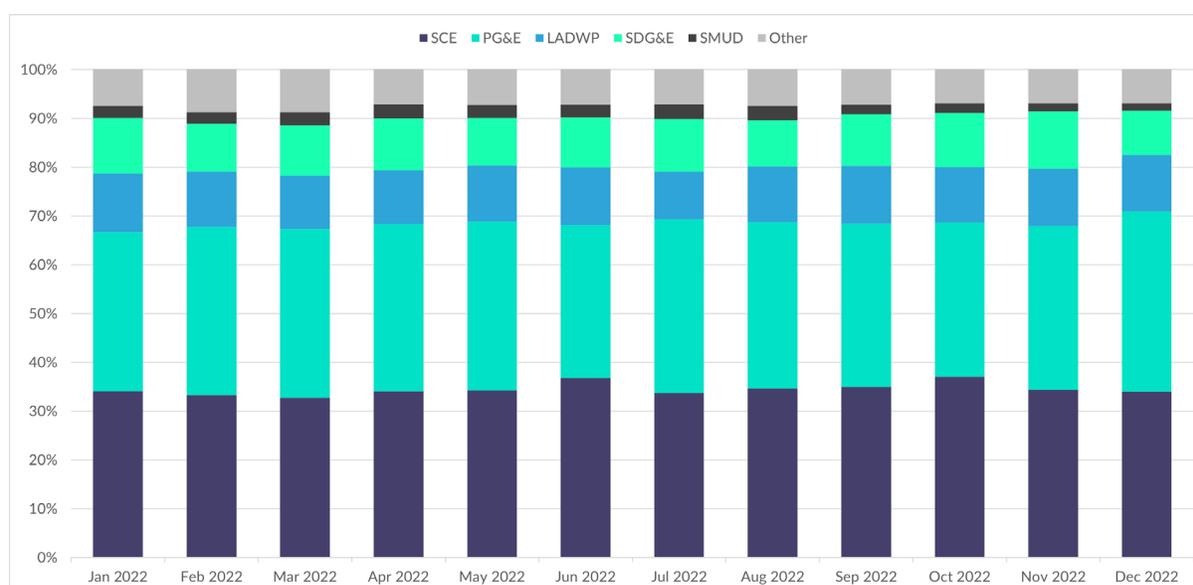
MAKE/ MODEL	REWARDED CUSTOMERS	
Porsche	1,937	1.03%
Cayenne	228	0.12%
Panamera	93	0.05%
Taycan	1,616	0.86%
Polestar	1,744	0.92%
1	4	0.00%
2	1,740	0.92%
Honda	3	0.00%
Clarity Plug-In Hybrid	3	0.00%
MINI	824	0.44%
Countryman Plug-in Hybrid	43	0.02%
Hardtop 2 Door	781	0.41%
Chrysler	679	0.36%
Pacifica Hybrid	679	0.36%
Lexus	582	0.31%
NX 450h+	582	0.31%
Mercedes-Benz	486	0.26%
EQB	2	0.00%
EQS	484	0.26%
Lucid	392	0.21%
Air	392	0.21%
Genesis	378	0.20%
GV60	378	0.20%
Zero	255	0.14%
DS	17	0.01%
DSR	20	0.01%
DSR Black Forest	1	0.00%
DSRP	1	0.00%
FX	8	0.00%
FXE	17	0.01%
S	53	0.03%
SR	20	0.01%
SR/F	28	0.01%
SR/S	90	0.05%
Mazda	247	0.13%
MX-30 EV	247	0.13%
Subaru	230	0.12%
Crosstrek	227	0.12%
Solterra	3	0.00%
Lincoln	164	0.09%
Aviator	78	0.04%
Corsair	86	0.05%
ElectraMeccanica	96	0.05%
SOLO	96	0.05%
LiveWire	59	0.03%
One	59	0.03%
Mitsubishi	55	0.03%
Outlander PHEV	55	0.03%
Arcimoto	32	0.02%
FUV	32	0.02%
Jaguar	30	0.02%
I-PACE	30	0.02%
Energica	17	0.01%
Ego	7	0.00%
Eva	10	0.01%
Karma	8	0.00%
GS-6	2	0.00%
Revero	6	0.00%
Land Rover	2	0.00%
Range Rover	1	0.00%
Range Rover Sport	1	0.00%
Harley-Davidson	1	0.00%
LiveWire	1	0.00%



## REWARDED CUSTOMERS BY EDU TERRITORY

As in 2021, the two largest EDU territories—PG&E and SCE—saw slight monthly changes to their respective shares of CCFR customers. For 2022, PG&E’s percentage of CCFR customers dipped slightly from 34.4% in 2021 to 33.6%. Correspondingly, SCE’s share increased from 33.4% in 2021 to 34.7%.

The first chart below shows the trends in EDU reward share by month, while the second chart shows the total percentage of customers rewarded in 2022 by EDU. The third chart, on the next page, shows the number of claims paid by EDU, followed by their overall percentage share of all claims in 2022.



EDU	% OF CUSTOMERS REWARDED IN 2022	% OF CUSTOMERS REWARDED IN 2021	CVRP % BENCHMARK
Pacific Gas & Electric Company	33.6%	34.4%	39.8%
Southern California Edison	34.7%	33.4%	31.1%
Los Angeles Department of Water and Power	11.4%	12.0%	10.0%
San Diego Gas and Electric	10.4%	10.6%	10.5%
Sacramento Municipal Utility District	2.6%	2.5%	2.1%
Medium and Small POUs	7.4%	7.1%	6.6%

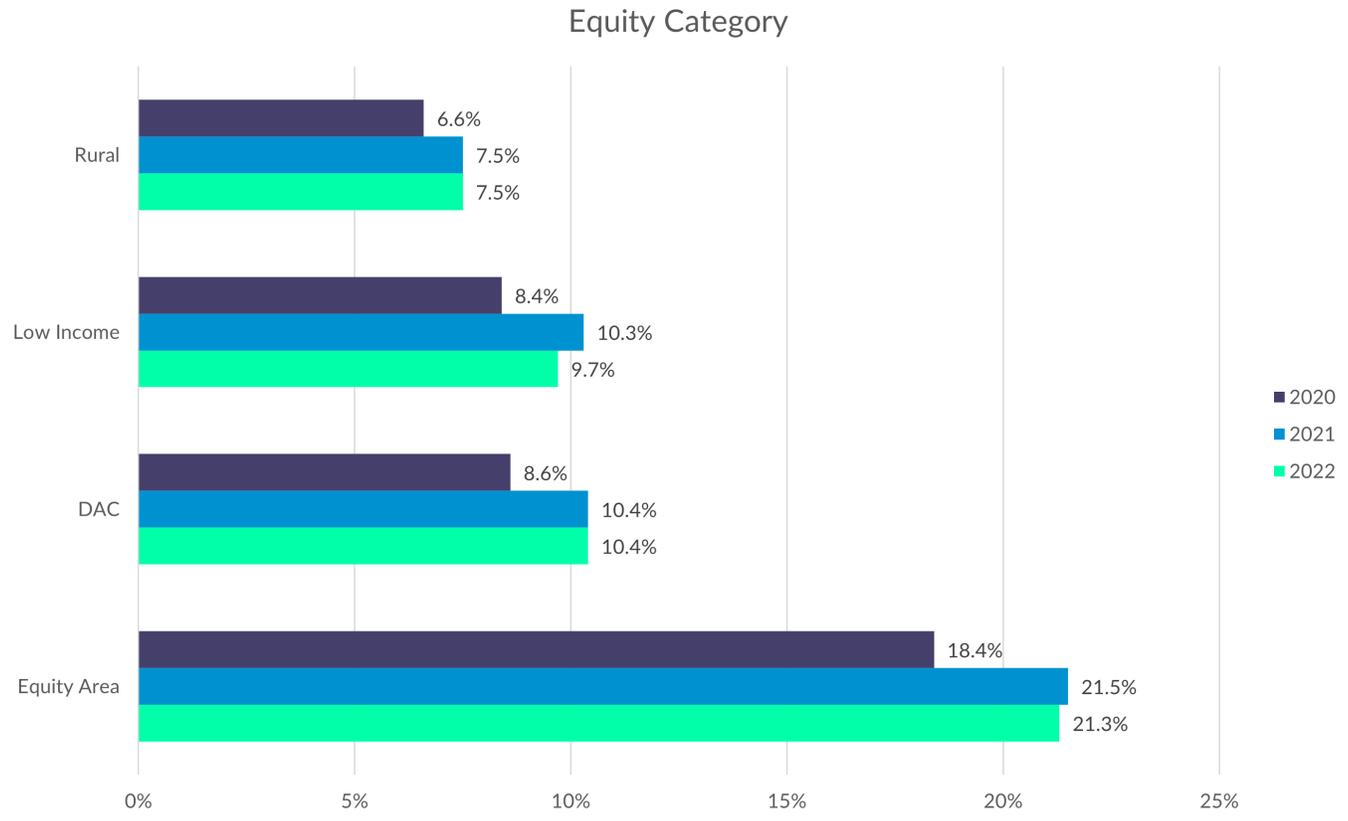
EDU	CLAIMS PAID	CLAIMS SHARE %
Southern California Edison	131,854	34.10%
Pacific Gas & Electric Company	131,333	33.97%
Los Angeles Department of Water & Power	45,196	11.69%
San Diego Gas & Electric	40,639	10.51%
Sacramento Municipal Utility District	9,732	2.52%
City of Anaheim Public Utilities Department	3,273	0.85%
Glendale Water & Power	2,992	0.77%
Silicon Valley Power	2,453	0.63%
Pasadena Water & Power	2,121	0.55%
City of Palo Alto	1,929	0.50%
City of Riverside	1,762	0.46%
Roseville Electric	1,722	0.45%
Modesto Irrigation District	1,721	0.45%
Burbank Water & Power	1,548	0.40%
Imperial Irrigation District	1,326	0.34%
Other	1,107	0.29%
Alameda Municipal Power	1,060	0.27%
City of Cerritos	904	0.23%
Turlock Irrigation District	829	0.21%
Merced Irrigation District	402	0.10%
Azusa Light & Water	366	0.09%
Moreno Valley Electric Utility (MVU)	363	0.09%
Redding Electric Utility	303	0.08%
Liberty Utilities	245	0.06%
Lodi Electric Utility	237	0.06%
Colton Electric Utility Department	149	0.04%

EDU	CLAIMS PAID	CLAIMS SHARE %
City of Healdsburg	147	0.04%
Truckee Donner Public Utilities District	141	0.04%
Lathrop Irrigation District	136	0.04%
City of Industry	95	0.02%
City of Lompoc Electric Division	87	0.02%
City of Banning Electric Department	80	0.02%
Bear Valley Electric Service	67	0.02%
PacifiCorp	64	0.02%
City of Corona Department of Water & Power	62	0.02%
City of Vernon Municipal Light Department	50	0.01%
City of Ukiah Electric Utility	45	0.01%
Rancho Cucamonga Municipal Utility	40	0.01%
Anza Electric Cooperative, Inc.	17	0.00%
City of Shasta Lake	17	0.00%
Plumas-Sierra Rural Electric Cooperative	14	0.00%
City of Pittsburg	13	0.00%
Trinity Public Utilities District	9	0.00%
Gridley Electric Utility	7	0.00%
Shelter Cove Resort Improvement District	4	0.00%
Biggs Municipal Utilities	3	0.00%
City of Needles	2	0.00%
Lassen Municipal Utility District	2	0.00%
Kirkwood Meadows Public Utility District	1	0.00%
Port of Oakland	1	0.00%
Surprise Valley Electrification Corporation	1	0.00%



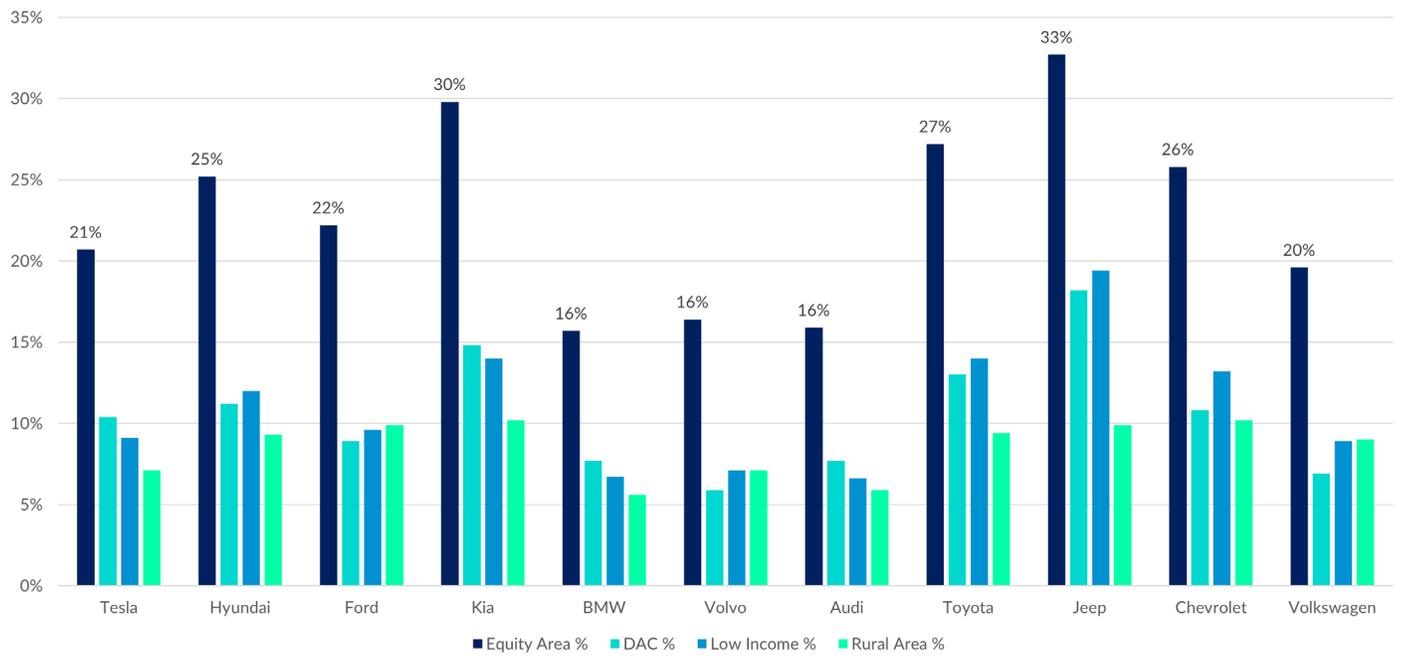
### DISPERSION OF REWARDED CUSTOMERS IN UNDERSERVED COMMUNITIES

While 2021 saw an uptick in rewarded customers from equity areas—from 18.4% in 2020 to 21.5% in 2021—the upward trend did not continue in 2022, with equity area rewards remaining flat (21.3%). The halving of the CCFR reward in November 2021 likely had an impact on lower-income households’ purchasing power for new EVs in 2022, as did the temporary reward reduction in the second half of 2022.



### DISPERSION OF REWARDED CUSTOMERS IN UNDERSERVED COMMUNITIES BY OEM

The chart below represents the ratio of customers from underserved communities for the top ten most popular OEMs—all with at least 4,000 rewarded customers in 2022.



# 04 2022 PROGRAM FINANCIALS

## 04 2022 PROGRAM FINANCIALS

LINE NO.	METRIC	ESTIMATED AMOUNT	ACTUAL AMOUNT
1	Deposits	\$177,452,247.00	\$129,451,080.23
2	Rewards Paid	\$174,345,645.00	\$141,144,792.49
3	Total Administrative and ME&O Costs	\$15,525,000.00	\$12,967,066.59
3a	Program Administrator Costs	Data Redacted for Confidentiality Purposes	
3b	Program Implementer Costs		
3c	Program Auditor Costs		
3d	Consumer-Facing ME&O Costs		
4	Administrative Costs, % of Deposits	8.7%	10%
5	<b>Total Program Expenditures</b>	<b>\$189,870,645.00</b>	<b>\$154,111,859.08</b>

### COST DETAIL

2022 represents the second full year of non-launch operating costs since the CCFR program inception on November 17, 2020. The 2022 estimated budget was presented to, and approved by, the CCFR Steering Committee at the beginning of the calendar year. 2022 presented several challenges for the CCFR program; most notably a \$48M (27%) shortfall in expected deposits that was driven almost entirely by the decline in LCFS credit prices that began in Q3 2021, reducing credit prices from \$180 to \$63 per metric ton in less than eighteen months. In response to the shortfall, the CCFR Steering Committee approved the temporary reduction of the reward to \$0, effective September 1, 2022. The reduction is still in place as of the time of this submission.

#### 1. DEPOSITS

Deposits into the program in 2022 were primarily the mandated, periodic, quarterly deposits from the large EDUs with additional annual contributions from opt-in medium EDUs in March and amounted to a total of \$129M for calendar year 2022.

#### 2. REWARDS PAID

The program reimbursed automotive retailers for \$33M less in reward claims in 2022 than anticipated. This is due to the program undergoing a \$0 reward reduction for the last four months of the year.

### 3. TOTAL PROGRAM ADMINISTRATOR COSTS

The LCFS Regulation states that “Administrative Costs, excluding startup costs, to support any Clean Fuel Reward program funded by LCFS credit proceeds may not exceed 10% of LCFS credit proceeds contributed to the Clean Fuel Reward program annually.”<sup>1</sup> SCE sought to further define this in Advice Letter 3982-E and proposed that it be allowed to serve as the “administrator to pay ME&O and administrative costs under rules established by the Steering Committee, including the fees charged by all third-party implementer(s), at an amount not to exceed 10% of the total annual LCFS statewide CCFR program revenue”<sup>2</sup> and that this cap would “include other administrative costs besides those of the third-party implementers, including, but not necessarily limited to, SCE’s program administration costs.”<sup>3</sup> The Commission agreed and found that “a 10% program budget cap on administrative and ME&O spending is reasonable if it includes all IOU [investor-owned utility] administrative costs related to the CCFR program.”<sup>4</sup> The 10% cap is applied to the rollup of these costs, which are described in more detail below.

- A. Program Administrator Costs are defined as costs incurred by SCE to support the administration of the CCFR program including, but not limited to program management, data analytics, reward and invoice processing, cash account management, internal audit support, and procurement activities. These were lower than expected in 2022 due in large part to the reduction in activity, due to the \$0 reward, in the second half of the year.
- B. Program Implementer Costs represent costs incurred by the program implementer to manage the program website and retailer portal, process reimbursement claims, manage ongoing program and retailer support activities, and to develop and execute retailer outreach and education activities. These were lower in 2022 than expected due to the reward reduction and a winding down in processing and administrative costs in Q3 of 2022.
- C. Program Auditor Costs are costs associated with paying the program’s third-party external auditing firm to examine the program’s processes and perform annual and interim audits. These were higher than expected this year due to the invoicing schedule of the two audits that were conducted in 2021, overlapping into the 2022 billing cycle, plus additional scope that was requested as a one-time audit by the Program Steering Committee to examine specific internal controls. These were offset in the total program costs by lower costs across the board associated with the reduction in activity in the second half of the year.
- D. Consumer-facing ME&O Costs are for activities that are directed at consumers to increase consumer awareness about the program and electrification in general. These costs are separate from the retailer-focused ME&O activities that are built into Line Item 3. These costs were lower than expected in 2022 as the consumer-facing ME&O activities scaled back during the reward reduction period.

### 4. ADMINISTRATION COSTS, PERCENTAGE OF DEPOSITS

§95483(c)(1)(A)(4) of the LCFS Regulation states that the Total Administrative Costs for the CCFR program in any year cannot exceed 10% of the total annual deposits into the program. This section of the Regulation further delineates that startup costs are separate from Total Administrative Costs and are not subject to the 10% administrative cap.

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<sup>1</sup> §95483(c)(1)(A)(4) of the LCFS Regulation, at page 33

<sup>2</sup> SCE Advice Letter 3982-E, at page 22

<sup>3</sup> Ibid

<sup>4</sup> Resolution E-5015, Findings and Conclusions 20, at page 33

# 05 LEARNINGS AND OPPORTUNITIES

# 05 LEARNINGS AND OPPORTUNITIES

## 2022 LEARNINGS

### Training and Consulting

CCFR consultant and retailer interactions brought several key challenges to light during the second program year.

#### 1. *Role Clarity*

OEMs, retailers, and EDUs are working toward the same goal to get more EVs on the road. The focus for 2023 and onward is to continue to define each role and determine the best way to ensure clarity in the roles and responsibilities. Continued success of the program is dependent on furthering the clarity for all involved parties in achieving the same goal.

#### 2. *Environmental Goals and Retail Connections*

Retailers and their teams would benefit from a comprehensive understanding of the EDUs' environmental goals and the programs that they offer to consumers that help achieve those goals. Similarly, a robust understanding of the connecting points between the retail experience and the EDU offerings that make EVs more cost-effective to own would be beneficial.

#### 3. *Priority Confusion*

OEMs face the twin tasks of meeting EV market share goals and simultaneously maintaining customer satisfaction, retention, and profitability. These three audiences (EDUs, retailers, and OEMs) should connect and work together to make the adoption of electric vehicles in California possible.

#### 4. *Meeting Delivery*

From a meeting delivery standpoint, key learnings from the Training and Consulting team included:

- Onsite meetings allowed the consultants to engage with leadership and sales teams and deliver more impactful training.
- The CCFR newsletter was an effective way to deliver messages and had a 36% open rate, which is impressive by industry standards.

### Community Partner Outreach Pilot Program

We identified three critical learnings that should be taken into consideration when engaging underserved communities.

#### 1. *EV and EV Ownership Education*

We identified a need to continue educating equity audiences about EVs and the benefits of EV ownership. Several of those engaged by the phone bank told the Customer Advocates that the educational information provided by the pilot moved EVs to their consideration list for the first time. This type of education is a critical success factor in growing EV adoption in underserved communities.

#### 2. *CCFR, Other State EV Rewards, and Rebate-Stacking Education*

During the pilot, after discovering that CCFR alone could not help them afford an EV, several individuals requested information about other California state EV rebates and rebate-stacking options. When this information was provided, those individuals continued their interest and consideration for EVs while shopping for their new vehicle. Providing this kind of rebate information is critical to achieving wider EV adoption in underserved communities.

### 3. Retailer Integration

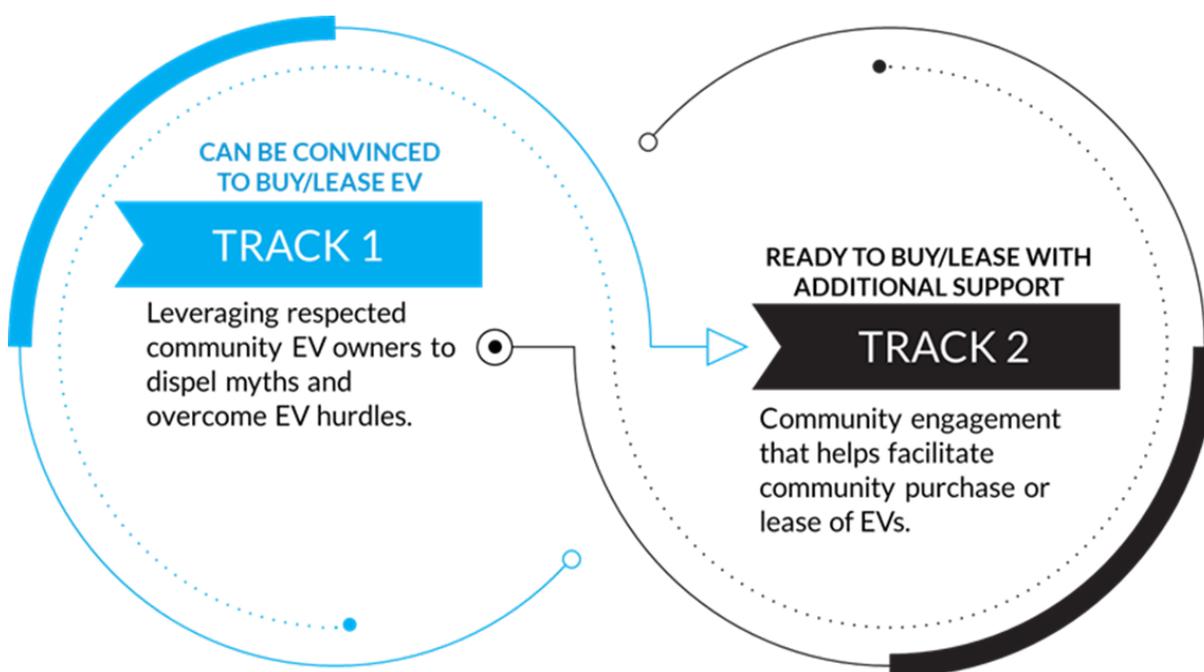
The fears and challenges that underserved communities face when contacting retailers while shopping for or purchasing new EVs remains a significant opportunity. Partnering with select retailers in these communities can help overcome these challenges. Opportunities to improve integration include identifying a retail employee at these select retailers to serve as an equity-audience “advocate” and point of contact, and scheduling an EV test drive with retailers in the program.

#### Future Considerations and Opportunities

Based on the results of the pilot program, expanding outreach and engagement within underserved communities is critical to ensuring equitable CCFR participation and achieving the state’s carbon neutrality goals. Through an analysis of comments made on the pilot’s social media posts and verbatims captured by the phone bank, we have identified two behavioral segments within the underserved communities that should be a focus of future outreach and engagement efforts, to help CCFR achieve its goals within the underserved communities.

<h3 style="color: #00A651;">1. Can Be Convinced to Buy/Lease EV</h3> <p>Would purchase or lease an EV, but have significant concerns about the power grid, battery life, and charger accessibility that must first be overcome before they will consider an EV</p>	<h3 style="color: #00A651;">2. Ready to Buy/Lease with Additional Support</h3> <p>The EV shopping/purchase experience can be particularly overwhelming for those in underserved communities, but with additional support many within this segment will become EV adopters</p>
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To help meet the unique needs of each of these two behavioral segments, we propose implementing a two-track outreach and engagement strategy for these underserved communities in 2023.



### **Track 1 Engagement and Outreach Plan**

*Target Audience: Can Be Convinced to Buy/Lease*

The first step in extending CCFR's scope in underserved communities begins by creating unique, sustained engagement and outreach that address community fears and misconceptions about EV ownership, the power grid, battery life, and general charging concerns.

The Track 1 plan focuses on identifying trusted individuals in the engagement areas who currently own EVs ("community EV advocates") and are interested in telling their EV ownership stories online and in person to others in their community. Community EV advocates would be provided with a talking-points outline, CCFR program information, and the program phone bank number. These individuals would be encouraged to generate content on their social media channels (Facebook, Instagram, Twitter, TikTok, etc.) that tells their EV story in their own words.

Overcoming the EV concerns held by this target audience is the way to effectively graduate them to Track 2, transitioning them to considering EVs, leveraging the CCFR reward, and ultimately purchasing or leasing an EV as their next vehicle.

### **Track 2 Engagement and Outreach Plan**

*Target Audience: Ready to Buy/Lease with Additional Support*

Track 2 is the natural progression for those engaged in Track 1 who have already overcome their EV concerns and are ready to consider purchasing an EV. Unfortunately, vehicle inventory issues that persisted through 2022 significantly limited this audience's ability to pursue an EV purchase or lease. While the three-stage engagement approach implemented for the pilot was successful in reaching those in the underserved communities who had an interest in buying or leasing an EV, with only minor modifications, future outreach strategies will be even more successful when EV inventories return to normal.

### **Future Program Expansion**

The next step in growing the pilot's outreach and engagement is to expand the Track 1 and Track 2 plans within the existing pilot markets (California regions that contain 96% of disadvantaged community [DAC] census tracts) and expand into select areas of San Diego. This would include all ZIP Codes that have a 4.0 DAC census tract.

### **Equity Audiences Engagement Insights Database and Dashboard**

Finally, consolidating all Track 1 and 2 engagement data, social media conversations, and survey results into one database and reporting dashboard can be a powerful tool in helping CCFR and the state make decisions, design rebate program rules, and better understand the needs of underserved communities as they relate to EV adoption. We propose creating such a dashboard for 2023 and beyond.

## Retailer Survey

The retailer survey produced powerful insights in support of making key improvements to the CCFR program.

### 1. Core Communications

#### Email

Newly enrolled retailers appreciate an email welcoming them to the program. Similarly, specialty standalone email communications should continue to be sent out on a bimonthly or quarterly cadence recognizing program milestones, as well as key news and legal updates. Enrolled retailers also appreciate a consistent monthly cadence for the program eNewsletter, as well as personal outreach from their dedicated consultants who offer helpful hints.

#### Text Messaging

Seventy-two percent of the retailer survey respondents said that they would like to receive updates and learning via text message more frequently, with a strong preference for once or twice monthly. However, they would prefer receiving a reduced amount of content to improve readability. These messages should include program updates, sales tips, etc., focusing on only one topic per text message and should be timed as closely as possible to time of relevancy.

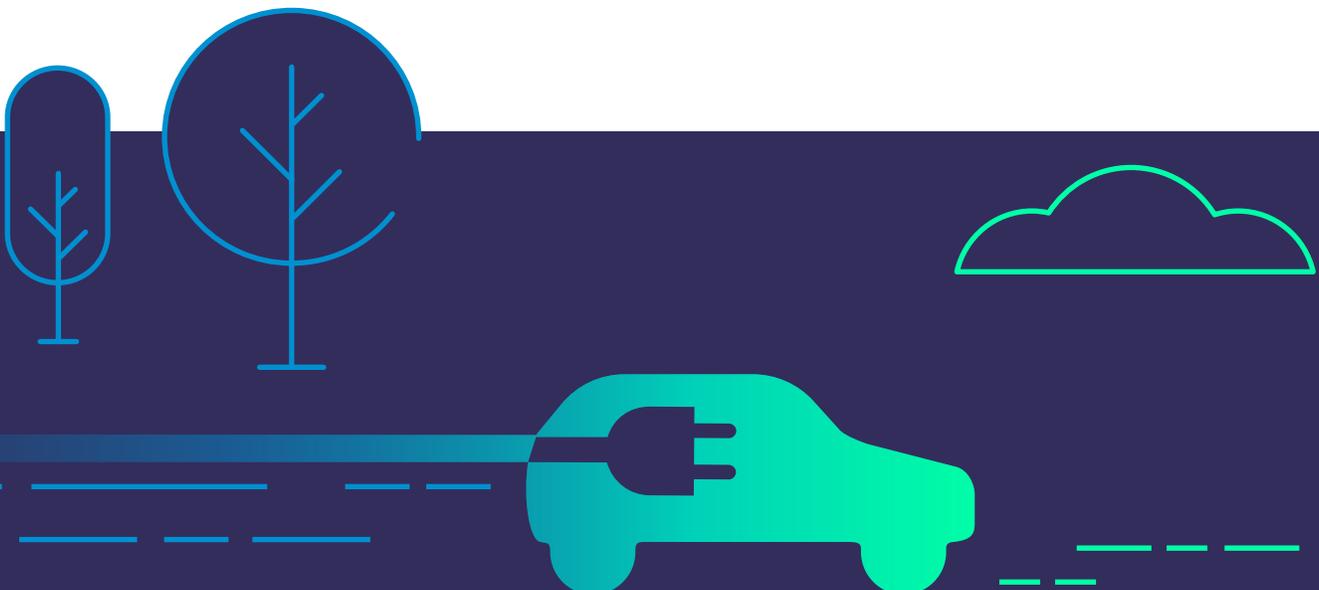
### 2. Key Opportunities

#### Adding New Users to the Program Portal

Program admins could use additional instruction, either via eNewsletter or direct consultant outreach, on how to add new users to the program portal.

#### Sales Manager/Directors Lack EV Knowledge

We have a wonderful opportunity to provide improved support and enhanced retailer team knowledge about electric vehicles through direct consultant contact and additional learning assets, such as a video library for sales managers and their teams.



## 2023 GOALS

### Retailer Training and Support

Moving into 2023, the program will continue to deliver EV education to retailer teams and be the connection point between OEMs, EDUs, and the enrolled retailers in the CCFR program. Here are how these goals will be achieved:

- Consultants will help retailers understand EDU goals and programs, as well as their pain points and how to alleviate these during selling conversations.
- Consultants will educate retailer sales teams to dispel the myths about EVs so the sales team can meet objections that are not based on product or price.
- Provide next-level training deliverables that retail teams can use with their sales and service teams.
- Continue to provide the website and search analysis in a revised format that will help retailers present EV as a brand and address EV service in search analysis.
- Continue to focus consultant meetings on how best to speak to retailer teams about the EV lifestyle and what is most important to EV customers: charging at home and on the road, maintenance, total cost of ownership (TCO), battery life, local rate plans, roadside assistance, etc.
- Update the current EV Education Checklist, QR Code Job Aid, and create a new checklist focused on EVs and the service department.

### Continue Momentum During Temporary Reward Reduction Period

- Shift to broad EV education.
- Keep retailers, consumers, EDUs, and stakeholders engaged.
- Maintain CCFR brand equity.

### Provide Measurement and Insights

- Show tangible value of consumer and retailer engagement.
- Collect additional consumer information for EDUs.
- Provide EV industry insights and trends.
- Leverage CCFR buyer data to collect additional insights and information via a survey.
- Leverage the CCFR website to survey EV shoppers and recent EV buyers about EV-related programs and benefits.

# 06 APPENDICES

## 06 APPENDICES

### APPENDIX A: GLOSSARY OF TERMS

TERM	DEFINITION
BDC	Business Development Center
BEV	Battery Electric Vehicle
CARB	California Air Resources Board
CCFR; CCFR Program	California Clean Fuel Reward Program (i.e., the point-of-purchase incentive for electric vehicles)
CPOP	Community Partner Outreach Pilot
CPUC	California Public Utilities Commission
CVRP	Clean Vehicle Rebate Project
DAC	Disadvantaged Community (see additional information on the following page)
EDU	Electric Distribution Utility—a complete list of participating EDUs is listed in AL 4090
EV	Electric Vehicle
GHG	Greenhouse Gas
GVWR	Gross Vehicle Weight Rating
LCFS	Low Carbon Fuel Standard
LI	Low-Income Community (see additional information on the following page)
Maritz	Maritz Automotive, the third-party implementer of the CCFR program
ME&O	Marketing, Education, and Outreach
OEM	Original Equipment Manufacturer
PHEV	Plug-In Hybrid Electric Vehicle
Program	See CCFR
Program Administrator	Authorized Administrator of the CCFR program, which shall be SCE for at least the first three years of the program
Retailer	A new car dealer, either online based or with a physical storefront, that is enrolled in the CCFR program to receive reward reimbursements
Reward	Point-of-purchase amount offered through the program
SCE	Southern California Edison
Steering Committee	Governing body of the Clean Fuel Reward Program
TCO	Total Cost of Ownership

## APPENDIX B: DEFINED EQUITY CATEGORIES

§95483(c)(1)(A)(6)(a) of the LCFS Regulation determines that special equity considerations should be given to underserved Californians through LCFS programs and defines these Californians as “disadvantaged communities and/or low-income communities and/or rural areas or low-income individuals eligible under California Alternative Rates for Energy (CARE) or Family Electric Rate Assistance Program (FERA) or the definition of low-income in Health and Safety code section 50093 or the definition of low-income established by a POU’s governing body.”<sup>5</sup> Each of the categories being considered in this report has unique characteristics:

**Disadvantaged Communities (DAC):** census tracts located in disadvantaged geographical regions as defined by the CalEnviroScreen 3.0 modeling. “CalEnviroScreen is a screening tool that evaluates the burden of pollution from multiple sources in communities while accounting for potential vulnerability to the adverse effects of pollution. CalEnviroScreen ranks census tracts in California based on potential exposures to pollutants, adverse environmental conditions, socioeconomic factors, and prevalence of certain health conditions. Data used in the CalEnviroScreen model come from national and state sources.”<sup>6</sup> While many DACs are often low-income communities, they are not always the same.

**Low-Income Communities:** census tracts with median household incomes at or below 80% of the statewide median income or with median household incomes at or below the threshold designated as low income by the Department of Housing and Community Development’s list of state income limits adopted pursuant to Section 50093.<sup>7</sup>

**Rural Areas:** a census tract with at least 75% of its population identified as rural by the latest U.S. Census data.<sup>8</sup>

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<sup>5</sup> §95483(c)(1)(A)(6)(a) at page 35

<sup>6</sup> <https://oehha.ca.gov/calenviroscreen/calenviroscreen-faqs>

<sup>7</sup> California Health and Safety Code §39713(d)(2)

<sup>8</sup> §95481 (a) (133)

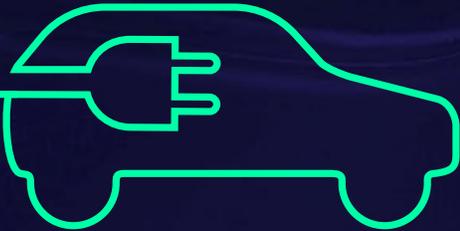


CALIFORNIA  
CLEAN FUEL  
REWARD<sup>SM</sup>

APPENDIX C

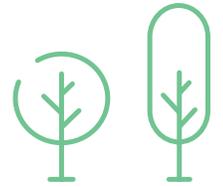
# CPOP REPORT 2022

PREPARED BY SOUTHERN CALIFORNIA EDISON  
06/17/2022

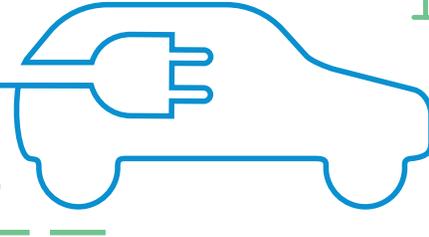


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## EXECUTIVE SUMMARY



To reach the level of EV adoption necessary to achieve California's carbon neutrality goals, all customers and communities must be considered in developing and implementing marketing, engagement, and outreach efforts. Equity audiences, or underserved communities, are one of the most critical segments within this equation.

Equity audiences face several unique challenges when it comes to EV adoption, and to date, traditional marketing efforts have not been effective in reaching and driving EV adoption within this segment.

In the first quarter of calendar year 2021, the CCFR Steering Committee identified an opportunity to implement a pilot that would evaluate multiple engagement and outreach activities in underserved communities. This pilot would focus on driving awareness and education for both EVs and CCFR. The pilot's purpose was to collect a deeper level of insight around the EV adoption challenges faced by these communities and identify the most effective ways to engage them and drive EV adoption moving forward.

Understanding, trust, and authenticity are critical factors in driving successful engagement with equity audiences. For this reason, community partner organizations were the central element driving the design, implementation, and measurement of this pilot.

The six-month pilot launched on November 21, 2022, and operated in the regions that contain 90% of California's disadvantaged community census tracts (San Joaquin Valley, Inland Empire and Los Angeles). Community partners in these areas utilized a mix of social media, live events, surveys, phone banks and customer advocates to educate their communities about EVs and CCFR, and drive awareness and consideration.

Customer Advocates also conducted surveys and engaged in two-way conversations that provided the pilot with a deeper understanding of these audiences and the most effective ways to engage them in the future.

Although the pilot faced significant challenges due to the auto industry's vehicle inventory supply, the pilot succeeded in achieving its education, awareness, and consideration goals. The learnings identified through analysis of the pilot's engagement data validate the niche, one-to-one, community-driven outreach approach as highly effective in engaging underserved communities. The pilot has also provided CCFR with valuable insights that can be utilized to further refine engagement with underserved communities moving forward.

The following pages of this report provide detailed pilot information including pilot development, community partners, and engagement deliverables, as well as results and key findings.

# 01 BACKGROUND

## EQUITY AUDIENCES

This pilot approaches equity and transportation electrification from the point of view of California regulation and defines equity customers in three ways:

**Low-income communities or low-income individuals (LI):** California Air Resources Board (CARB) ties qualification of “low-income” to the California Alternative Rates for Energy (CARE), the Family Electric Rate Assistance Program (FERA) or section 50093 of the State Health and Safety Code. These income levels are based on the 2022 Federal Poverty Guidelines (FPL). The income levels utilized by CARB vehicle incentive programs are defined as:

- 2022 FPL for a Household of 3 = \$23,030
- Low Income: <225% FPL (\$51,817.50)
- Moderate Income: 225%-300% FPL (\$57,575)
- Above Moderate Income: <300% FPL (\$69,090)

**Disadvantaged Communities (DAC):** Communities that are located in disadvantaged census tracts as defined by the [CalEnviroScreen](#) modeling. This definition considers air quality and exposure to other adverse environmental impacts, as well as local socio-economic conditions.

**Rural Areas/Communities:** These areas have typically been overlooked by energy transition, electrification, and efficiency upgrades.

## EQUITY CHALLENGES

The specific equity audiences identified above face significant barriers to EV adoption. Those include:

- EVs are perceived as an option available only for more affluent buyers. This contributes to much lower levels of familiarity and comfort with EV technology in the communities that can most benefit from their affordability and reliability.
- The cost differential between a new EV and an equivalent internal combustion engine vehicle averages approximately \$10,000. This price difference alone is sometimes equal to a low-income car buyer’s entire vehicle purchase budget.
- EV charging is much less available in disadvantaged and rural communities than in higher-income communities that typically receive more investment in infrastructure

To help correct this perception and overcome these barriers, equity audiences require extra support with:

- **Awareness**
  - Understanding that incentive programs can make EVs an affordable choice to purchase and operate.
  - Understanding that vehicle manufacturers are offering a growing variety of lower-priced EVs suited to a wide range of needs.
  - Assistance with learning about and qualifying for all available EV vehicle incentives.
- **Affordability**
  - Referrals to community lenders offering vehicle finance options with reasonable rates and supportive terms.
  - Referrals to vehicle insurers offering discounted premiums for EVs.

## Who Buys Electric Vehicles?

PEV buyers (those that purchase or lease a PEV) are mostly male, high-income, highly educated, homeowners, who have multiple vehicles in their household, and have access to charging at home. In California, the largest and most researched PEV market in the US, buyers have a mean income of \$190,000 per year, 81% own their home, 81% are college graduates, and 75% are male.<sup>1</sup>

- **Accessibility of EV shopping**
  - Referrals to nearby dealers with lower-priced EVs available to test-drive.
- **Accessibility of EV charging**
  - Assistance learning about and qualifying for home EV charging installation incentives.
  - Assistance locating convenient and affordable options for public charging.

## PILOT PURPOSE, GOALS, AND OBJECTIVES

### Purpose

To reach the level of EV adoption necessary to achieve the state’s carbon neutrality goals, all customers, and communities must be factored into marketing, engagement, and outreach efforts. The CCFR Community Partner Outreach Pilot was established to help CCFR test and understand the most effective ways to engage and communicate with specific underserved communities to ensure equitable program participation.

### Goals

The following goals were identified for the pilot program.

- **Awareness and Education** – Engage, educate, and drive awareness of the benefits of EV ownership and the CCFR program within equity segments.
- **Consideration** – Increase consideration of EV ownership and/or purchasing/leasing a CCFR-eligible vehicle.
- **Generate Insights** – Collect data, feedback, and insights to help better understand equity audience EV support needs, refine message relevancy, and ensure engagement is delivered in ways the audience feels are authentic.
- **Informed Recommendation** – Based on pilot engagement data and insights, provide an informed recommendation for a potential state-wide equity outreach & engagement program.

### Objectives

The following objectives were identified to build a framework that evaluates the impact of various engagement activities and collects insights to refine and improve future engagement initiatives with equity audiences.

- Engage equity audiences in two-way conversations about the benefits of EV ownership, the CCFR opportunity and their support needs, as it relates to EVs.
- Generate insights that help refine and improve future engagement initiatives with equity audiences.
  - Identify the most effective tactics and platforms for reaching these audiences.
  - Identify the most effective messaging for driving audience engagement.
  - Identify the most effective tools and resources that enable these audiences to continue their EV purchase/lease interest after engaging with the pilot.
  - Identify specific audience needs as it relates to leasing/purchasing an EV.
- Develop a deeper understanding of the differences between equity audiences and general consumer audiences as it relates to EVs.
- Validate the effectiveness of the pilot’s framework in reaching the right equity audiences, driving awareness, education, and consideration.
  - Increase audience understanding of the benefits of EV ownership.
  - Increase audience awareness of CCFR.
  - Increase audience purchase/lease consideration for EVs and CCFR.

## KEY MILESTONES

The following milestone dates outline the history and formation of the CCFR Community Partner Outreach Pilot.

### April-May 2021

- Steering Committee identified a CCFR program opportunity of enabling equitable access for disadvantaged communities
- Steering Committee made the decision to implement a pilot engagement and outreach program

### June-July 2021

- CCFR Equity Advisory Subcommittee was informed of the decision to implement a pilot
- Maritz Automotive was identified as the facilitator of the pilot program
- CCFR Equity Advisory Subcommittee was introduced to Maritz Automotive

### August-September 2021

- Fifteen Community Partners were offered the opportunity to opt into the pilot design process, three selected to participate
- Maritz conducted design sessions with the three Community Partners who opted in
- Engagement and Outreach framework was created based on community partner input

### October 2021

- Pilot program Request for Proposal (RFP) was created and distributed to community partner pilot program hand raisers
- Valley CAN was selected as lead community partner for the pilot
- Pilot statement of work and budget were submitted to the Steering Committee and pilot was approved

### November 2021

- Pilot deliverables were created, and community partner teams trained
- Pilot launched November 29, 2021

## 02 IMPLEMENTATION

### TARGET AUDIENCES, AREAS, AND COMMUNITY PARTNERS

The pilot was conducted in the California regions that contain 90% of disadvantaged community census tracts, as highlighted below.

#### SAN JOAQUIN VALLEY (Underserved rural community)



#### LOS ANGELES (High-density urban community)



#### INLAND EMPIRE (Adjacent but remote X-urban community)



### Community Partner Organizations

Understanding, trust, and authenticity are critical factors in driving successful engagement with equity audiences. For this reason, community partner organizations were the central element driving the design, implementation and measurement of the pilot outreach and engagement initiatives. They know the unique challenges equity audiences face and how to engage them in authentic ways that resonate, as they do it 365 days a year. The community partner organizations involved with the pilot included:



#### VALLEY CLEAN AIR NOW

*Lead Community Partner Agency and San Joaquin Valley Outreach Partner*

A 501(c)(3) public charity committed to quantifiably reducing air emissions in California's San Joaquin Valley, the region with the worst air quality in the United States.

Valley CAN served two roles in the pilot – Coordinating and managing all community partner pilot outreach activities and engaging the underserved rural community in the San Joaquin Valley.

[Additional Partner Information](https://valleycan.org/) <https://valleycan.org/>



## **REDEEMER COMMUNITY PARTNERSHIP**

### *Los Angeles County Outreach*

A 501(C)(3) nonprofit Christian community development corporation that has been working in the Exposition Park neighborhood in South Los Angeles since 1992 to create a safe, healthy, opportunity-rich community where children, youth and their families thrive. Our focus is on creating a network of programs and partners that will support the children in our neighborhood from birth to college and career.

[Additional Partner Information](#)



## **LIBERTY HILL FOUNDATION**

### *Los Angeles County Outreach Partner*

Liberty Hill Foundation is a laboratory for social change philanthropy. We leverage the power of community organizers, donor activists, and allies to advance social justice through strategic investment in grants, leadership training, and campaigns.

Liberty Hill envisions a society in which all people have a powerful voice, including those currently shut out of our democracy, people cut off from opportunities because they are poor, because of their skin color, because of their gender or sexual orientation, because of where they live, or where they were born. We will not rest until society provides justice and equality for all.

As a public foundation, we provide critical support for social justice campaigns, and as a nonprofit, we lead research and policy initiatives designed to drive systemic change. Our training institute strengthens and connects community leaders and our role as a convener allows us to bring unusual allies together across our region to affect change.

[Additional Partner Information](#)



## **LATINO AND LATINA ROUNDTABLE**

### *Inland Empire Outreach Partner*

The Latino/a Roundtable of the San Gabriel and Pomona Valley works to improve quality of life and socio-economic justice for the Latinx community and those facing inequities through advancing education, leadership development, and civic participation.

[Additional Partner Information](#)

**ENGAGEMENT STRATEGY**

**Engagement Framework**

Maritz and Valley CAN worked together to create an engagement framework that assisted in identifying deliverables that aligned with the pilot's goals and drove action within targeted communities.

**AWARENESS**

FACEBOOK AD | FACEBOOK LIVE VIDEOS | EVENTS | WEBSITE

- PHONE BANK
- ONLINE FORM
- INTAKE SURVEY
- PHONE SUPPORT
- CUSTOMER ADVOCATES

**Outreach Structure**

Valley CAN developed a cohesive structure that identified touchpoints to ensure outreach drove forward progression and provided the program opportunities to collect equity audience insights, feedback, and data.

Engage and educate communities about EVs and CCFR and then drive them to a trusted source for additional information and support.

Identify those currently shopping for a vehicle who are interested in buying/leasing an EV.

Provide support and tools to help facilitate purchase/lease with those interested in buying/leasing an EV.

## OUTREACH ELEMENTS

The pilot’s community partners leveraged their existing social media channels, websites, people, and events to promote CCFR to potential new car buyers in their communities and encouraged them to visit their website to learn more.

### Community Partner Social Media Posts

Weekly organic and boosted postings on community partner Facebook Pages were designed to educate low-income/ disadvantaged/underserved communities about EVs and drive interest and consideration for purchasing/leasing EVs and the CCFR program.

- [Valley CAN Facebook Page](#)
- [Redeemer Community Partnership Facebook Page](#)
- [Latino and Latina Roundtable of the San Gabriel and Pomona Valley Facebook Page](#)



### Community Partner Facebook Live Events

Biweekly Facebook Live Events hosted by community partners engaged communities in informational, two-way conversations about topics that alternated between EV education, benefits of EV ownership, EV shopping, finance, and purchasing. Broadcasts were conducted in both English and Spanish.

### Live In-Person Events

Valley CAN created and staffed a CCFR-branded booth at six Tune In & Tune Up events in the San Joaquin Valley. These events took place on Saturdays and typically hosted 350-500 low-income disadvantaged community drivers. Trained community partner Customer Advocates engaged attendees face-to-face with both general EV and CCFR informational materials and answered any questions. Customer Advocates also provided attendees with access to the online Stage 1 Survey, detailed below, and assisted them in completing the survey.



## Stage 1 Survey

Community Partner social media posts and live event activities prompted community members to visit their websites to learn more about EVs and CCFR, and then invited them to complete an optional online survey. These surveys, or intake forms, collected demographic, purchase intent and EV knowledge information from those we engaged.

## Stage 2 Survey

Customer Advocates made follow-up calls to those who requested additional information in the online survey. During these calls, Customer Advocates asked and documented responses to specific questions to help identify those who were interested in buying/leasing now or in the future. Examples of these questions include:

- Are you still interested in buying or leasing an electric vehicle?*
- Do you have any questions about how the incentive programs work or what you need to do to receive the program rewards?*
- Do you have any fears or concerns about any aspect of the incentive programs?*
- Do you have any questions about purchasing, leasing, or owning an EV that I can help you with?*
- Are there any reasons or factors that might stop you from buying, leasing, or owning an EV?*
- Have you had an opportunity to search available electric vehicles in your area online or at a dealership?*
- Are you comfortable searching and purchasing/leasing a vehicle through a dealer/online or would you typically prefer to purchase through an informal means (e.g., social media, local auto shop, friends/family)?*
- Has the information and support we've provided you with made the process of buying or leasing an EV easier for you?*
- Has this engagement influenced your decision to buy or lease an EV?*

## Stage 3 Survey

Customers who identified themselves as ready to purchase an EV now during the Stage 2 calls received an additional follow-up call a few days later. Customer Advocates used this contact to identify the information and support these customers needed to find and purchase the EV they wanted. Examples of these questions include:

- What model of EV you are looking for?
- Are these cars within your price range if you use the incentives?
- Are you interested in a test drive?

## Community Partner Phone Bank

Community partner Customer Advocates provided additional support by hosting a phone bank that took incoming calls from those engaged by the pilot to answer questions about EVs and CCFR. They also made outbound calls to those who requested follow-up information and contact at various phases of the engagement.

## 03 ENGAGEMENT RESULTS

This section of the report provides an overview of the engagement and outreach numbers achieved by the pilot program from November 29, 2021, through May 14, 2022.

### FACEBOOK POST ENGAGEMENT

Sustained Facebook social media engagement plan implemented by all three community partners drove significant engagement with our targeted audiences.

WEEK	REACH	IMPRESSIONS	POST ENGAGEMENT	VIDEO PLAYS	REACTIONS
12/5/21 - 12/11/21	19,150	22,095	784	N/A	178
12/12/21 - 12/18/21	22,376	26,386	1,034	N/A	163
12/19/21 - 12/25/21	26,504	30,786	987	N/A	233
12/26/21 - 1/1/22	29,058	33,090	690	N/A	130
1/2/22 - 1/8/22	46,059	51,889	1,096	N/A	189
1/9/22 - 1/15/22	32,086	36,516	750	N/A	291
1/16/22 - 1/22/22	55,253	50,977	1,343	N/A	281
1/23/22 - 1/29/22	65,237	83,041	5,003	6,879	1,084
1/30/22 - 2/5/22	102,972	132,316	7,100	12,449	895
2/6/22 - 2/12/22	99,094	67,228	5,692	7,107	1,898
2/13/22 - 2/19/22	128,734	184,193	9,937	19,238	1,737
2/20/22 - 2/26/22	168,147	192,670	10,164	15,574	1,336
2/27/22 - 3/5/22	216,356	253,687	16,409	30,675	1,233
3/6/22 - 3/12/22	265,258	304,951	10,177	11,097	2,162
3/13/22 - 3/19/22	207,360	318,747	22,580	36,088	2,680
3/20/22 - 3/26/22	177,327	269,470	17,643	28,225	1,593
3/27/22 - 4/2/22	74,381	112,392	10,953	20,222	818
4/3/22 - 4/9/22	31,126	37,096	8,537	16,102	219
4/10/22 - 4/16/22	51,641	73,590	24,358	52,110	400
4/17/22 - 4/23/22	5,969	8,399	57	N/A	313
4/24/22 - 4/30/22	31,955	45,676	15,953	30,728	572
5/1/22 - 5/7/22	5,145	5,721	520	0	414
5/8/22 - 5/14/22	12,709	13,877	209	0	7
<b>TOTALS</b>	<b>1,873,897</b>	<b>2,354,793</b>	<b>171,976</b>	<b>286,494</b>	<b>18,826</b>

## FACEBOOK LIVE EVENTS ENGAGEMENT

The 15 Facebook Live Events hosted by community partners delivered the pilot's largest volume of engagement.

FACEBOOK LIVE EVENT DATE	REACH	VIEWS
January 27, 2022 (Valley)	15,606	8,137
February 10, 2022 (Valley)	14,677	9,583
February 24, 2022 (Valley) February 25, 2022 (LA)	29,434	22,381
March 10, 2022 (Valley) March 11, 2022 (LA)	24,205	16,949
March 16, 2022 (LA/IE)	21,303	15,006
March 25, 2022 (LA)	15,416	11,895
April 6, 2022 (LA/IE) April 7, 2022 (Valley) April 8, 2022 (LA)	42,406	32,174
April 21, 2022 (Valley)	4,655	2,884
April 27, 2022 (LA/IE)	6,480	3,421
May 4, 2022 (LA/IE)	39	37
<b>Total</b>	<b>174,221</b>	<b>122,467</b>

## IN-PERSON EVENT ENGAGEMENT

Nine live, in-person events were conducted by Valley CAN over a 15-week period from January to May of 2022. These events engaged a total of 2,411 individuals. *State and local COVID-19 protocols significantly limited Advocate engagement with participants.*

IN-PERSON EVENT DATE	LOCATION	ATTENDEES ENGAGED
January 22, 2022	Madera, CA	280
February 12, 2022	Bakersfield, CA	400
March 5, 2022	Stockton, CA	396
March 26, 2022	Fresno, CA	376
April 10, 2022	Tulare, CA	263
April 23, 2022	Huron, CA	100
April 30, 2022	Modesto, CA	301
May 14, 2022	Merced, CA	265
May 14, 2022	Fresno, CA	30
<b>Total</b>		<b>2,411</b>

## SURVEY ENGAGEMENT

922

Total Stage 1 Survey Completions

196

Total Stage 2 Survey Completions

33

Total Stage 3 Survey Completions

## PHONE BANK ENGAGEMENT

1,777

Total number of inbound calls received by the pilot phone bank

993

Total number of unique inbound phone numbers that contacted the pilot phone bank

## AUDIENCES ENGAGED

Data collected from the 790 completed **Stage 1 Surveys** provide a snapshot of who we engaged and where they live.

### TOP 10 SURVEYS COLLECTED - BY COUNTY

1. Los Angeles - 208
2. Fresno - 149
3. Tulare - 69
4. Kern - 68
5. San Joaquin - 63
6. Merced - 47
7. Madera - 43
8. Unidentified - 39
9. Stanislaus - 35
10. Kings - 15

### TOP 10 SURVEYS COLLECTED - BY CITY

1. Los Angeles - 117
2. Fresno - 108
3. Bakersfield - 59
4. Unidentified - 55
5. Stockton - 45
6. Madera - 32
7. Visalia - 32
8. Merced - 28
9. Modesto - 17
10. Porterville - 13

### TOP 10 SURVEYS COLLECTED - BY ZIP CODE

1. Unidentified - 51
2. 93722 - 21
3. 93638 - 19
4. 90018 - 17
5. 93637 - 15
6. 93727 - 15
7. 93257 - 13
8. 95348 - 13
9. 93291 - 12
10. 95206 - 12

### INCOME TIERS

\$200K or more	1%
\$150-199K	1%
\$100-\$149	6%
\$75-99K	9%
\$50-75K	20%
\$25-49K	38%
\$24K>	25%

### EDUCATION BACKGROUND

13%	Less than High School diploma
31%	High School or equivalent
15%	Technical or occupational certificate
12%	Associate Degree
14%	Bachelor's degree
5%	Master's Degree
10%	Other

### AGE RANGE

18-25	6%
26-35	24%
36-49	38%
50+	23%
Unidentified	8%

### AVERAGE INCOME

\$46,514

### AVERAGE HOUSEHOLD SIZE

2.9

### AVERAGE FPL

231.8%

### RENT VS. OWN

40% Rent  
60% Own

### AVERAGE MILES DRIVEN PER WEEK

185

# 04 INSIGHTS AND LEARNINGS

Through an analysis of quantitative and qualitative inputs collected from the pilot, behavioral sciences application, and automotive industry and equity audience expertise, Valley CAN and Maritz Automotive have identified significant insights that should be considered moving forward with future engagement and outreach activities.

*There are significant differences between the audiences we engaged and those who purchased/leased a vehicle through the CCFR program.*

PILOT STAGE 1 SURVEY DEMOGRAPHICS		CCFR POST SALE SURVEYED BUYERS – ALL BRANDS	
<p><b>Demographic Snapshot (746 Surveys)</b></p> <p><b>Age</b></p> <p>7% 18-25 23% 26-35 39% 36-49 24% 50+ 8% No Answer</p>	<p><b>Average Household Income</b></p> <p>0% \$200K or more 0% \$150-199K 9% \$100-\$149 5% \$75-99K 20% \$50-75K 64% \$25-49K</p> <p><b>Educational Background</b></p> <p>5.1% Postgraduate 15.7% Bachelors 16.8% Some College/Technical or Occupational Degree 12.5% Associates degree 35% High School or Equivalent 14.8% Less than a High School Education</p>	<p><b>Demographic Snapshot (All Makes, 46K Surveys)</b></p> <p><b>Age</b></p> <p>8% 21-29 22.5% 30-39 25.1% 40-49 20.4% 50-59 13.8% 60-69 7.3% 70-79</p>	<p><b>Average Household Income</b></p> <p>29.9% \$200K or more 13.3% \$150-199K 18.8% \$100-\$149 9.7% \$75-99K 8.4% \$50-75K 5.1% \$25-49K</p> <p><b>Educational Background</b></p> <p>37.1% Postgraduate 36.9% Bachelors 10.5% Some College 5.8% Associates degree 5.1% High School or Equivalent</p>
<p><b>CCFR POST SALE SURVEYED BUYERS – HYUNDAI</b></p> <p><b>Demographic Snapshot (HYUNDAI, 1.5K Surveys)</b></p> <p><b>Age</b></p> <p>7.9% 21-29 21.8% 30-39 20.7% 40-49 22.2% 50-59 14.9% 60-69 9.2% 70-79</p>	<p><b>Average Household Income</b></p> <p>18.9% \$200K or more 14.2% \$150-199K 23.2% \$100-\$149 12.6% \$75-99K 11.1% \$50-75K 6.7% \$25-49K</p> <p><b>Educational Background</b></p> <p>40.8% Postgraduate 33.5% Bachelors 11% Some College 6.4% Associates degree 4.2% High School or Equivalent</p>	<p><b>CCFR POST SALE SURVEYED BUYERS – CHEVY</b></p> <p><b>Demographic Snapshot (CHEVROLET, 1.75K Surveys)</b></p> <p><b>Age</b></p> <p>5.3% 21-29 18% 30-39 22.5% 40-49 22.2% 50-59 17.2% 60-69 10.4% 70-79</p>	<p><b>Average Household Income</b></p> <p>21.2% \$200K or more 14.1% \$150-199K 20.5% \$100-\$149 11.2% \$75-99K 10.4% \$50-75K 7.6% \$25-49K</p> <p><b>Educational Background</b></p> <p>41.7% Postgraduate 33.4% Bachelors 11.4% Some College 4.6% Associates degree 4.6% High School or Equivalent</p>
<p><b>CCFR POST SALE SURVEYED BUYERS – TOYOTA</b></p> <p><b>Demographic Snapshot (TOYOTA, 3K Surveys)</b></p> <p><b>Age</b></p> <p>7.3% 21-29 21.2% 30-39 21.3% 40-49 19.5% 50-59 18.4% 60-69 9% 70-79</p>	<p><b>Average Household Income</b></p> <p>17.8% \$200K or more 12.3% \$150-199K 22% \$100-\$149 11.8% \$75-99K 11.9% \$50-75K 8.5% \$25-49K</p> <p><b>Educational Background</b></p> <p>36.9% Postgraduate 33.7% Bachelors 11.1% Some College 6.6% Associates degree 6.5% High School or Equivalent</p>		

*The pilot engagement and support made it easier for many of those we engaged in underserved communities to buy/lease an EV and significantly influenced their decision to purchase/lease an EV.*

50%

of Stage 2 Survey respondents said the information and support provided by the pilot made the process of buying/leasing an EV easier for them.

71%

of Stage 2 Survey respondents said the pilot engagement and support influenced their decision to buy or lease an EV in a positive way.

*The Pilot's three-phased engagement approach was extremely effective in driving awareness and interest in EVs and CCFR in underserved communities, especially those in-market to buy/lease a vehicle now.*

The pilot's Stage 1 survey showed the majority of those who took action after the first engagement with the pilot were in-market to buy/lease a vehicle in 6 months or less.

*What is your expected time frame for buying a vehicle?*

58%

ASAP

20%

1-3 Months

14%

3-6 Months

8%

6-9 Months to 1 Year

*Fuel efficiency and price were the two biggest factors in motivating our pilot audience's decision to purchase/lease a new vehicle.*

41%

Fuel Efficiency

31%

Price

11%

Quality

11%

Safety

6%

Other

*Equity audiences in these markets have significant interest in EV full size pickup trucks, minivans, and work vans, but have not converted to EV yet due to lack of vehicle options.*

We identified several individuals who told us they were ready to convert to EV now, but they require larger vehicles for work and/or family purposes and the lack of larger EV vehicles has prevented them from purchasing an EV.

**The average new vehicle purchase/lease budget of those we engaged who completed the stage 1 survey was \$11,235.**

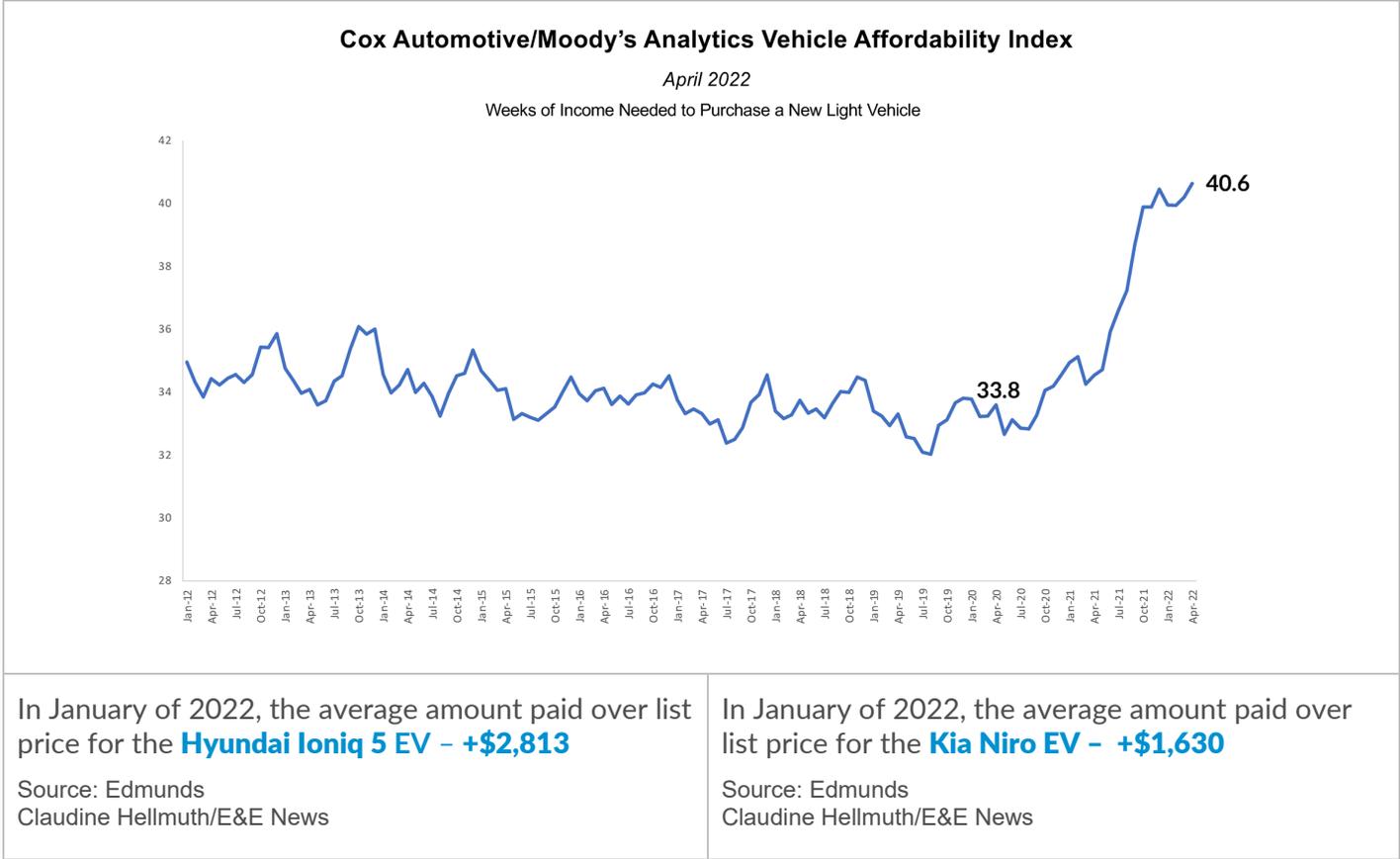
This amount is significantly lower than the starting price of the most affordable EVs currently on the market (as of March 2022<sup>2</sup>).

2022 Nissan Leaf Starting price: \$28,425	2022 Mini Cooper SE Hardtop Starting price: \$30,750	2022 Chevrolet Bolt EUV Starting price: \$32,495
2022 Mazda MX-30 Starting price: \$34,695	2021 Hyundai Kona EV Starting price: \$35,245	2021 Kia Niro EV Starting price: \$41,205

**Vehicle inventory challenges significantly impacted the pilot’s ability to convert those in-market car buyers to take action.**

The vehicle chip shortage has made it a challenge for most consumers to buy/lease vehicles, especially in the communities we engaged through the pilot. Lack of EV inventory at retail decreased our audience’s ability to shop both online and at retail. Retailers were also pricing EVs significantly over MSRP, pushing these vehicles further out of our audience’s price range. Other Retailers offered their customers opportunities to put down a deposit to get on an EV waiting list, creating another significant barrier to EV purchase/lease for underserved communities.

Cox Automotive/Moody’s Analytics Vehicle Affordability Index measuring the median number of weeks of income needed to purchase the average new vehicle increased significantly between [April 2021 and April 2022](#), from 33.8 weeks to 40.6 weeks.



**The majority of those who engaged with the Stage 1 Survey were in-market to purchase/lease a new vehicle vs. a used vehicle.**

**64%**  
New Vehicle

**36%**  
Used Vehicle

**The majority of those who completed the Stage 1 Survey who were in-market to purchase/lease a vehicle had some level of knowledge about EVs.**

**How much do you know about electric vehicles?**



*In addition to increasing awareness of CCFR, the pilot increased awareness of other California EV reward programs. Several of the individuals we engaged requested additional information about other rewards and if it was possible to “stack” multiple rewards.*

*Phone bank and social media comments identified several individuals who were motivated to research EV ownerships costs due to current high fuel prices and inflation’s impact on maintaining a vehicle, making it nearly impossible for them to afford an internal combustibile engine vehicle now.*

*Several of those engaged by the pilot commented that the current \$750 CCFR reward amount was not nearly enough to help them afford a new EV.*

*Comments and discussions associated with pilot social media posts, and comments documented by phone bank staff, identified four significant hurdles that need to be addressed to drive adoption of EVs within underserved communities.*

**CA POWER GRID CONCERNS**

- “What happens when everybody has their state-Manda EV and they tell you that you can’t charge them because the grid, (which is at capacity right now without them), is overloaded?”
- “If EVERYONE in the US brought home an electric car today, there wouldn’t be enough electricity (oil made) to charge them!! FACT!! The electric Grid would Fail!!”
- “We don’t have an electrical grid that’s good enough to charge all this It’s all smoke and mirrors.”
- “Just make sure you don’t charge it between the hours of 4 PM and 9 PM, or during rolling blackout periods...”
- “...and don’t forget the power grid that is under repeat black-out stress already, and your goanna increase the load on this shaky network and claim PROGRESS?”

**CHARGING CONCERNS**

- “I have problems paying my electric bill now!!! Are you nuts?!”
- “Where do you suppose, everyone is going to charge their cars? The infrastructure for electric cars is not there yet!”
- “While they are working, most companies do not have charging stations for these cars this is especially true for manufacturing companies.”
- “The only companies that provide charging stations are companies were employees are office workers working at a desk.”
- “The incentive will die as soon as people realize that access to charging your car will be limited.”
- “We have one charging station in our neighborhood... after 7 years...”

**BATTERY LIFE CONCERNS**

- “...and don’t forget replacement of the battery is going to be a small fortune.”
- “Once most people drive an electric vehicle, the government will charge you to have it disposed of when its battery is fully depleted of useful life.”
- “How much does it cost to replace the battery, and where do the batteries go when replaced?”
- “With all the money we’re saving on gas we are just banking the money in our savings since we know we will need to replace the battery in a 5+ years from now.

**CAN’T AFFORD AN EV EVEN WITH REWARDS**

- “I can’t afford to buy a new one on my own, even with the rebate.”
- “I can’t afford it on its own. The (CCFR) rebate is not enough.”
- “I can’t afford an EV at the moment even if you include the rebate.”
- “This rebate isn’t enough.”
- “Also, the initial CCFR incentive is real low for people who would like to use it.”

*"Here's the reality with electric cars... the battery Technology is still not there."*

*"Battery replacement is ridiculous. Any money you saved on gas will go to the batteries and then some."*

*"It's almost impossible for him to get an EV with the 750 help."*

**Pilot engagement has identified four unique EV behavioral segments within the communities we engaged during the pilot.**

The collection and analysis of pilot data, survey inputs, phone bank and social media comments/conversations has provided us deeper understanding of the hurdles and support underserved communities need to transition to EV. We believe applying this understanding to future engagement is critical to closing the gap in underserved communities becoming EV adopters.

<p><b>SEGMENT 1</b> <b>EV DENIER</b></p> <p>Will never buy an EV and cannot be convinced otherwise.</p>	<p><b>SEGMENT 2</b> <b>CAN BE CONVINCED TO BUY/LEASE</b></p> <p>Would purchase or lease an EV, but have significant concerns about the power grid, battery life, and charger accessibility that must first be overcome before they will consider an EV.</p>
<p><b>SEGMENT 3</b> <b>READY TO BUY/LEASE WITH ADDITIONAL SUPPORT</b></p> <p>The EV shopping/purchase experience can be particularly overwhelming for those in underserved communities, but with some additional support in this area, many within this segment will become an EV adopter.</p>	<p><b>SEGMENT 4</b> <b>CURRENT REWARDS NOT ENOUGH</b></p> <p>Currently have an interest in purchasing/leasing a new EV, however even with the CCFR reward, they still cannot afford a new EV.</p>

# 05 APPENDIX

## REFERENCES

<sup>1</sup> Lee, J. H., Hardman, S. & Tal, G. Who is buying electric vehicles in California? Characterizing early adopter heterogeneity and forecasting market diffusion. *Energy Research Social Science* 55 (2019).

<sup>2</sup> [Here Are the 11 Cheapest Electric Vehicles You Can Buy](#)



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