





PAIN POINT OR MOMENT THAT MATTERS?

Why or why not?

EV-specific barriers derived from GM Electric Vehicle Ethnography December 2018.

No, neither: Customers have many research options that work for them, so this is a relatively painless task—and even enjoyable for some.

Barriers: Cost premium, dealer knowledge level, understanding of total cost of ownership and tax incentives.

No, neither: The customer is narrowing their consideration set using a variety of inputs and ultimately aren't stressed about making a final decision yet.

Barriers: Finding other EV drivers for an honest assessment.

No, neither: The trial experience (physical or virtual) is generally positive, and there may not be pressure to commit at this point.

Barriers: Product availability, no EV test drive offered, dealer knowledge level.

Yes, this is a Moment that Matters: This critical decision results in a sale or a loss for the brand or dealer. 72% say this decision point is positive because they're looking forward to the new purchase.

Barriers: Dealer is not excited about EV and is trying to sell me a different car that is on the lot.

KEY

Fluid cycle; start and end at any point

Time based; but can occur out of order

Decision point; diverges into paths

Activity is a quantified Moment that Matters

Activity is a quantified Pain Point

Unique to EV

THINKING

Insights from Qualitative Research

RESEARCH

VALIDATE

EXPERIENCE

DECIDE

Is this my "all in" price? I don't want to see additional charges at the end

There are certain features I want but a price I can't exceed

I want to conduct my research based on features, not by model/brand

How do I know I am getting all the right information and best price for this vehicle?

Is fast charging available?

Is an EV a real option for me?

How different are the costs of operating/owning a gas-powered vehicle versus an EV (overall price, incentives, tax credits)?

I need to understand what type of charging options are available to me where I live/work

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I hope my coworkers and family think I am making the right choice

I am going to ask my Facebook friends what they think

Wow this got great reviews—it's definitely staying on my list

I need to make sure my sources are reliable

How will my insurance rates change when/if I get this new vehicle?

Why can't I compare different models and brands at the same time?

Can I really make an EV work with my lifestyle?

Is an EV the attitude I want to project?

My EV owner friends have some good things to say

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I want to try the exact vehicle I want to get

Let me check it out, but save the hard sell

The salesperson is showing me all these awesome features, I wonder how much it will increase the price

Why does n't my research match what the dealer is telling me?

Test drives today aren't long enough

I borrowed my friend's car and now I want all this new technology

Why do I know more about the features on this EV than the dealer?

Driving an EV is really different

I'm nervous about charging—show me how that works

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This is exactly what I was looking for, it's perfect!

When I look at all the options and features I want, can I really afford this vehicle?

I did my research, so I know I am getting the vehicle for the price I want

The dealer offered me less than I was expecting for my trade-in — this changes everything

This may not be the best time to get a new vehicle. I think I'll wait

I like that the dealer listened to me. When I'm ready to buy I'll come back here

I have been thinking about EVs for years—now is finally the time!

The dealer is not excited to sell me an EV—he wants me to decide on something different

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FEELING

Quantifies Customer Sentiment

15% Excited  
42% Pleased  
27% OK  
12% Neutral  
1% Unhappy  
2% Frustrated  
0% Furious

19% Excited  
42% Pleased  
25% OK  
12% Neutral  
1% Unhappy  
1% Frustrated  
0% Furious

20% Excited  
44% Pleased  
23% OK  
10% Neutral  
1% Unhappy  
2% Frustrated  
0% Furious

23% Excited  
43% Pleased  
17% OK  
9% Neutral  
1% Unhappy  
1% Frustrated  
0% Furious

SHOP

NEEDS

From quantitative research, ranked by importance I want/need a vehicle, service, or experience that...

Responses from all GM owners

RESEARCH

VALIDATE

EXPERIENCE

DECIDE

Provides a final dealer price upfront without surprises

Allows you to select exactly the features you want instead of choosing between packages of features

Provides a guaranteed quote that will match the final price at the dealer so there are no surprises in your estimated monthly payment

Provides an accurate trade-in value for your current vehicle before you negotiate for your new vehicle

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Provides you with enough information about a recall on a vehicle you're considering to make a confident purchase

Helps you understand your bottom-line price, including all the offers and incentives that apply to you

Provides a side-by-side comparison of add-on in-vehicle services (e.g., emergency services, radio subscriptions, Wi-Fi) across providers

Provides a collection of third-party reviews, ratings and awards in one place to help you narrow your vehicle choices

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Makes you feel the salesperson is listening to you and respecting your needs over their own needs

Allows you to test-drive a vehicle for at least 24 hours so you can really understand how comfortable the vehicle is in real life

Allows you to experience vehicle features and technology so that you feel confident these features are right for you

Allows you to test-drive a vehicle for at least 24 hours so you can really understand how the vehicle performs

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Ensures the dealer respects your needs during the buying process when you're purchasing a vehicle in an urgent situation (vehicle totaled in accident, etc.)

Provides special offers (i.e., discounted vehicle price, incentive, discounted service) to recognize your previous purchases from that dealer or manufacturer

Helps you get the right vehicle to purchase or lease when you need to replace your current vehicle quickly

Recommends the best time to buy or lease a new vehicle based on your specific warranty, repairs, lease or purchase terms

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Responses from EV owners only

Allows you to select exactly the features you want instead of choosing between packages of features

Makes it easy to understand how things like accidents, potholes, puddles and inclement weather impact electric vehicle safety

Makes you knowledgeable about the technology features in the vehicle to ensure you're selecting the right vehicle for you

Provides a collection of third party reviews, ratings, and awards in one place to help you narrow your vehicle choices

Provides you with enough information about a recall on a vehicle you're considering to make a confident purchase

Provides you all the information you need to have a conversation with your employer or landlord about installing charging equipment for you to use

Gives you an estimated itemize breakdown of home charging installation costs

Allows you to test-drive a vehicle for at least 24 hours so you can really understand how the vehicle performs

Provides you with take-home materials that summarize the information on the specific vehicle you test drove

Allows you to test-drive a vehicle for at least 24 hours so you can really understand how comfortable the vehicle is

Ensures that the features (e.g., power seats, heated seats, power windows) in your electric vehicle are as refined as in a gas-powered vehicle

Helps you know what you need to do before your lease ends (vehicle inspection, etc.)

Recommends the best time to buy or lease a new vehicle based on your specific warranty, repairs, lease or purchase terms

Offers advice so you can determine if now is the right time to buy your next vehicle based on your changing needs

Helps you understand the differences between leasing or purchasing your next vehicle so that you can make an informed decision

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SHOP

GENERAL MOTORS

As of 1/24/2020



*PAIN POINT  
OR MOMENT  
THAT  
MATTERS?*

Why or why not?  
EV-specific barriers  
derived from  
GM Electric Vehicle  
Ethnography  
December 2018.

**Yes, this is a Moment that Matters:**  
Finding the vehicle the customer wants creates the strongest positive emotion in this stage of the journey. It is critical the customer finds what they want with minimal effort.

**Yes, this is a Pain Point:** When the dealer is unable to find what they want it creates frustration and unhappiness for 6% of customers, which in turn negatively impacts the sale.

⚡ **Barriers:** Lack of dealer inventory and the wait period.

Yes, this is a Pain Point: 10% of customers feel negatively about the effort to negotiate the best price. Customers often feel that they have been misled when it comes to incentives and offers and getting to the final "all in" price of the vehicle.

**⚡ Barriers:** Inability to sift through the tax incentives and the EV-specific rebates.

Yes, this is a Pain Point: 7% of customers have negative feelings about the purchase process which includes accurate final price, the amount of time it takes, and just an overall bad dealer experience. This is a point of no return for the customers and these triggers could cause customers to rethink the purchase.

**Barriers:** Frustrated with the need to work with multiple entities to fulfill EV needs.

**Yes, this is a Pain Point:** Securing financing at an affordable rate combined with high sales pressure tactics for “add-ons” causes pain for the customer. In addition, the time-consuming and often manual processes creates frustration and unhappiness for 6% of customers.

**⚡ Barriers:** Uncertainty around the cost and the options for home charging.

KEY

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- ⚡ Activity is a quantified Pain Point
- ⚡ Unique to EV



## NEEDS

quantitative research, ranked by importance I want/need a vehicle, service, or experience that ...

Responses from  
all GM owners

Responses from  
EV owners only

