

# Electric Vehicle Mystery Shopping Study

An investigation into the customer experience at EV dealerships in Ireland



# Electric Vehicle Mystery Shopping Study

A mystery shopper activity to understand and investigate the customer experience at EV dealerships in Ireland

Date: March 2022

## **Sustainable Energy Authority of Ireland**

SEAI is Ireland's national energy authority investing in, and delivering, appropriate, effective and sustainable solutions to help Ireland's transition to a clean energy future. We work with the public, businesses, communities and the Government to achieve this, through expertise, funding, educational programmes, policy advice, research and the development of new technologies.

SEAI is funded by the Government of Ireland through the Department of Communications, Climate Action and Environment and Department of Transport.

© Sustainable Energy Authority of Ireland

Reproduction of the contents is permissible provided the source is acknowledged.

## Contents

Executive Summary.....	4
Introduction .....	6
Objectives .....	6
Methodology .....	6
Mystery Shopper .....	6
Dealership Sample Selection.....	7
Visit Approach .....	7
Questionnaire .....	7
Results & Findings.....	8
Overview.....	8
EV Visibility.....	10
Car Recommendation .....	11
EV Knowledge .....	11
Sales Approach .....	13
Overall Customer Experience.....	14
Conclusion .....	15
Recommendations .....	16
References .....	17
Appendix – SEAI EV Questionnaire .....	18

## Executive Summary

Targets for the electrification of Ireland's national fleet have been set down by government through the Climate Action Plan (CAP). It is imperative to understand the full breadth of the customer journey and identify actions and policy decisions which will encourage an increase in the rate of Electric Vehicle (EV) adoption to meet these targets. The purpose of this study is to

- better understand the stage of the customer journey where the customer interacts with the dealership staff
- determine if there are any barriers to EV adoption at this stage; and
- propose potential actions to improve the customer experience.

In 2020, SEAI published a behavioural insights report on encouraging the purchase of electric vehicles in Ireland. This report established the various stages in the customer journey for purchasing a new car and in particular an electric car. From the review of existing research, it was evident that the interaction with car dealership staff could potentially be a barrier to EV adoption. SEAI undertook this study to examine if there are barriers present in Ireland car dealerships. To accomplish this SEAI appointed a market research organisation to perform mystery shopping on the SEAI registered EV dealership network. For the purpose of this study EV refers to Battery Electric Vehicles (BEV) and Plug-in Hybrid Electric Vehicles (PHEVs).

We drafted customer profiles, customer scenarios and a questionnaire for use by the shoppers to ensure a consistent approach to all mystery shopper visits. We selected a representative sample of 179 registered dealerships to undergo the mystery shopping.

The overall average score from the mystery shopping was 67%. Many of the overall scores recorded are lower than what would be considered the typical "norm" for the automotive industry. However, the scores represent a more positive attitude to EVs than that found in other international studies. This is a solid foundation to begin with, but improvements are required to positively influence consumers to select an EV.

Just over half of salespeople mentioned EVs as an option in response to a neutral opening query from the customer, despite their profile and driving habits being suitable for an EV. However, once prompted by the customer, salespeople were generally positive about EVs, with three quarters of final car recommendations being for BEVs or PHEVs.

The main reasons provided by salespeople in favour of purchasing an EV were the environmental impact, running costs, range, and the potential for home charging, while reasons provided against purchasing included purchase cost, range, inconvenience, and public charging infrastructure. Incentives provided by the government and SEAI were mentioned in 86% of visits with the most frequent mentions for SEAI EV purchase grant, SEAI home charger grant and lower fuel costs.

Research shows the use of EV calculator and/or comparator tools to highlight the personal savings and benefits of an EV can influence the likelihood to purchase. However, reference or use of such tools only featured in 2% of visits.

An interesting result emerged highlighting that 66% of salespeople were rated as "knowledgeable" about EVs. However, 75% of customers were ultimately recommended an EV.

Following completion of the visit the shoppers were asked to record whether they would be more or less likely to purchase an EV. Based on the interaction with the salespeople, the information and advice received, 68% of shoppers indicated they would be more likely to purchase an EV with the remaining 22% less likely.



**Figure 1. Summary of key takeaways from results**

Some actions to be considered to improve the customer experience and the scoring of dealership and their staff may include:

- Improve level of knowledge amongst dealership staff about EVs nationally:
  - Encourage brands to provide further training
  - Build on the current education tools provided by SEAI through webinars and the Energy Academy
  - Support staff to engage and share their advice and knowledge at the point of sale in an enthusiastic manner
- Promote the benefits of driving an EV:
  - Run a large-scale communication campaign to highlight the benefits of going electric
  - Run roadshow events across the country to provide an opportunity for people to easily test drive an EV
- Encourage dealerships to utilise the SEAI EV comparator tool
- Track improvements in customer experience
  - Re-run this study annually and benchmark the results
  - Identify actions that worked and did not work
- Provide support to switch to EVs
  - Retain the current suite of incentives at their current levels until the mass adoption segment of the EV adoption curve is attained in Ireland
  - Encourage brands to re-work their commission structure to favour EVs over ICE vehicles
  - Continue improving the SEAI grant system to ensure a speedy, easy to use, and efficient service for the EV dealership network
- Inform and reward EV dealerships
  - Provide a summary of this report to all dealerships and brands
  - Run the SEAI EV Dealership of the Year Awards as an annual event
    - Target full brand participation at a dealer level
  - Investigate expansion of dealership awards to incentivise the individual dealership staff
- Expand future studies to incorporate the second hand EV market in Ireland
  - Examine customer experience of purchasing second hand EVs
  - Investigate attitudes in the marketplace to customers trading in second hand EVs

### Introduction

The customer journey of purchasing a vehicle, new or used, can be broken down into several different steps from pre-contemplation up to delivery of vehicle. This statement rings true for the purchase of Electric Vehicles (EVs). One of the critical steps on this journey is the customer experience at car dealerships. The experience can be seen as a key component of the customer journey towards EV adoption. Presently, in Ireland the EV adoption curve is progressing away from the “early adopters” phase and is entering the broader more mainstream customer phase – mass adoption. It is likely as the broader customer base are now considering and purchasing EVs, the interaction between a potential customer and the sales staff at EV dealerships will become increasingly influential in the transition to EVs in Ireland (SEAI, 2020).

A study by Zarazua de Rubens et al. (2018) brings forward the barriers encountered by customers purchasing new vehicles and considering an EV. Zarazua de Rubens et al. (2018) indicated a lack of willingness from dealership staff to sell EVs compared to ICE vehicles in Sweden, Iceland, Norway, Finland, and Denmark due to anticipated longer sales time, lack of knowledge and competence to sell, lower profitability for dealerships, less after-sale revenue from servicing and the hassle of installing charge points. Separate research by Matthews et al. (2017) found a lack of availability of EVs in dealerships for customer test drive and long lead times for production and delivery of vehicles were significant barriers to adoption.

The mystery shopper activity was commissioned by SEAI to determine if these barriers to EV adoption are present in Ireland. SEAI wanted to better understand the customer journey and determine any potential areas in the customer experience that could be enhanced to improve the rate of EV adoption in Ireland. Having a base level of understanding of the customer experience at Irish car dealerships will provide the opportunity to improve low performing areas but also highlight and expand on existing strengths.

The objectives, methodology, structure, and results of the completed study are presented in detail throughout this report. The fieldwork was completed during September and October 2021.

### Objectives

The overall objective of this study was to conduct a quantitative and qualitative study of the Irish consumer experience of purchasing EVs from car dealerships through what is typically considered “mystery shopping”. Objectives included to:

- Gain a better understanding of the EV customer experience in Irish car dealerships
- Identify potential drivers and barriers of EVs at the point of sale
- Investigate the quality of information provided by salespeople on EVs
- Identify potential policy solutions to improve the customer experience and increase EV adoption in Ireland.
- Identify areas of improvement

### Methodology

SEAI appointed a market research organisation to perform the study. The market research organisation provided several mystery shoppers who visited car dealerships, posing as typical customers and made an enquiry about buying a new car. SEAI operates a registered network of EV dealerships from which the visits were selected.

179 dealerships were visited as part of this study. The selection represented 28 motor brands who have an EV offering as part of their sales line-up. This research considered EVs as including BEVs and PHEVs.

### Mystery Shopper

The mystery shopper’s role was to pose as a typical customer who is interested in purchasing a new vehicle. The shopper entered the dealership ready to provide details about their driving habits (50-60km daily commute), having access to off-street parking and having finance arranged already. The general customer scenario was that of a person whose profile and driving habit were suitable for an EV. The shopper records their experience by completing a report after their interaction with the dealership staff member.

The gender spread between the mystery shoppers was 50/50. The mystery shoppers were aged between 25 and 65 years. As EVs have a higher retail price than equivalent ICE vehicles, an age profile beginning at 25 years was selected to ensure believability of mystery shoppers' interest and finances for purchasing such a vehicle by dealership staff. The mystery shoppers all received training surrounding EVs, the visit approach and the questionnaire.

### Dealership Sample Selection

A sample of car dealerships to be visited was constructed using stratified sampling. The full list of SEAI registered dealerships were grouped by brand. Where a dealership sold more than one brand, these were counted as separate dealerships (in accordance with standard practice in the market research industry). The number of dealerships to be sampled for each brand group was chosen so that the representation mirrored the proportion of the full list of dealerships. A random sample of dealerships was then taken from each subgroup. However, four of the brands registered with SEAI had only registered one dealership. As they only represented one dealership entry into the stratified sampling technique they were not selected in the representative sample. To ensure all brands were represented, these four dealerships were manually reinserted into the sample which led to a final sample of 181 dealerships.

After mystery shopping had commenced, issues were identified with eight of the dealerships on the list. The addresses SEAI has on file were for the dealer's head office. These were replaced by selecting a dealer of the same brand in the same county or an adjacent county in one instance. There were further issues identified with two dealerships as they represented a brand who was winding down activity in Ireland. No visit was conducted for these two dealerships. Therefore, a final sample of 179 dealerships was reached.

### Visit Approach

Every participating mystery shopper was provided with and trained in the visit approach and customer scenario to engage with the dealership and the staff. The visits typically lasted between 15 and 25 minutes. The mystery shoppers were instructed to engage with the salespeople about buying a new car but not to take a test drive if offered or discuss peripheral issues like finance or trade-in values.

The shoppers were instructed to first survey the forecourt and the showroom. The shopper proceeded to engage with the salespeople with a neutral opening query *"Hi, I'm interested in a new [give a size] car."* The shoppers had been trained on the different EVs per brand and were able to align their query with a similar sized EV available in the dealership. The opening query was caveated by the shopper providing some further info on their driving requirements *"I drive about 50-60kms a day"*. If after the opening query EVs were not mentioned spontaneously by the salespeople, the shoppers were instructed to make two further prompts to try and engage the salespeople on EVs.

Following the opening exchanges, the key role of the shopper was to observe the salesperson and what they said and did. Like a real interaction, the discussion would be led by the salesperson. The shoppers had three specific questions to ask during the interaction if they had not come up in the natural, salesperson led, discussion regarding:

- EV Car Range
- The cost of running an EV v ICE over 7-10 years
- The environmental impact of EVs v ICE

### Questionnaire

The questionnaire was designed and laid out for shoppers to provide a structure to the visit and record their customer experience. The questionnaire can be found in Appendix 1. There were five principal areas considered in the questionnaire:

- EV Visibility
- Car Recommendation
- EV Knowledge
- Sales Approach
- Overall Customer Experience

## Results & Findings

### Overview

The mystery shopper visits reports were divided into five sections to reflect the questionnaire. The questions in each section were assigned importance weighting to reflect the salesperson’s knowledge of, and sales attitude towards EVs and EV visibility.

The overall score for all 179 visits was 67%. Comparing this figure to other mystery shopping programmes in the automotive industry, this is a relatively low score. However, comparisons with the referenced studies mentioned previously suggests the 67% as a good starting score for dealerships.

The highest scoring areas were EV Knowledge (71%) and Sales Approach (66%).

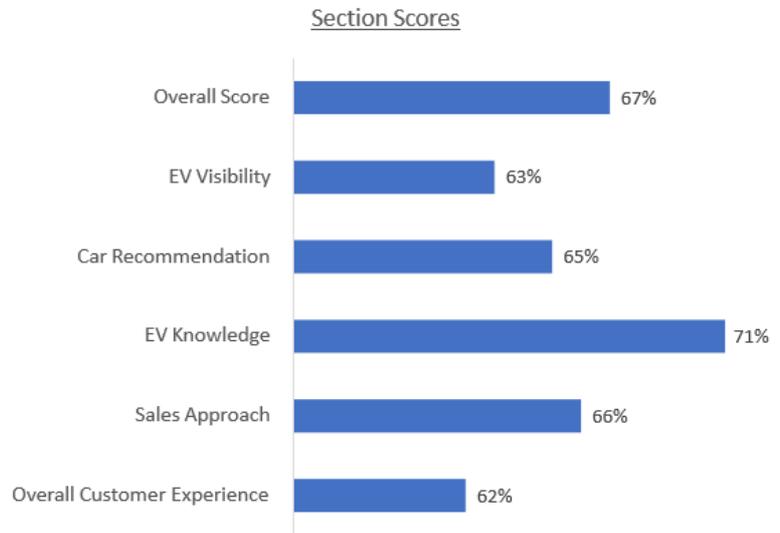


Figure 2. Overall scores of mystery shopper activity

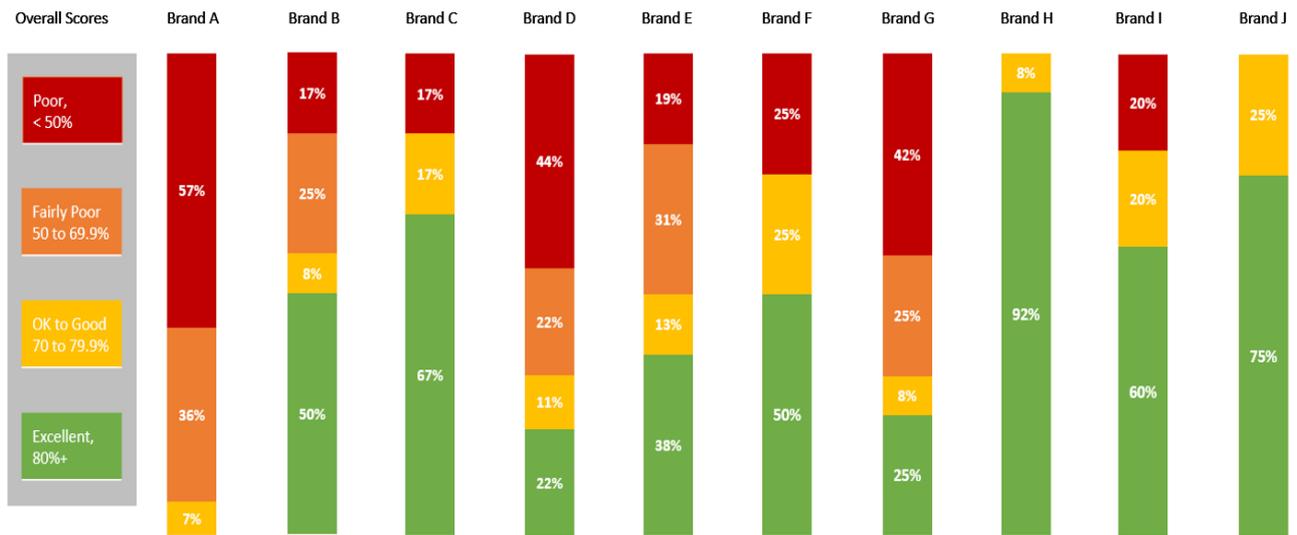


Figure 3. Summary of performance of top 10 car selling brands in Ireland presented in random order

### Dealership Scores

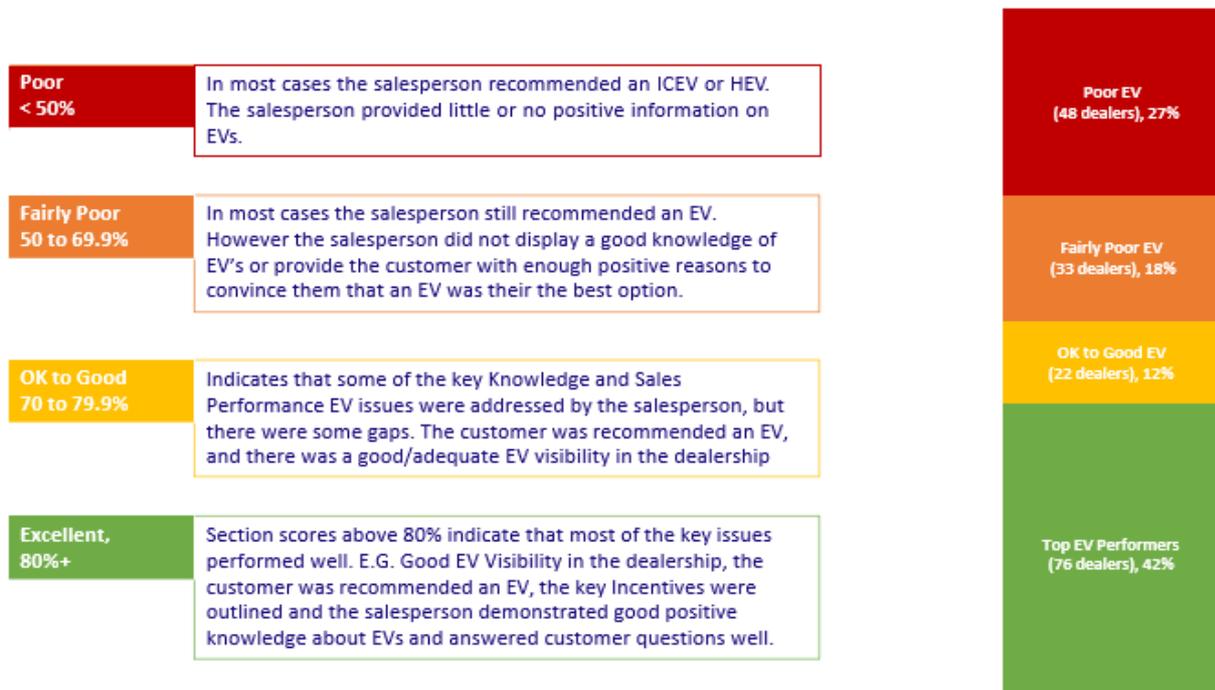


Figure 4. Detailed categorisation of scores

### EV Visibility

Shoppers were instructed to survey the forecourt and showroom on arrival if possible. This was achieved in 90% of the visits. EVs were on display in forecourts and showrooms in approximately 75% of the visits. Most dealerships had fewer than three EVs visible. EVs were at least as visible as ICE vehicles in 61% of visits.

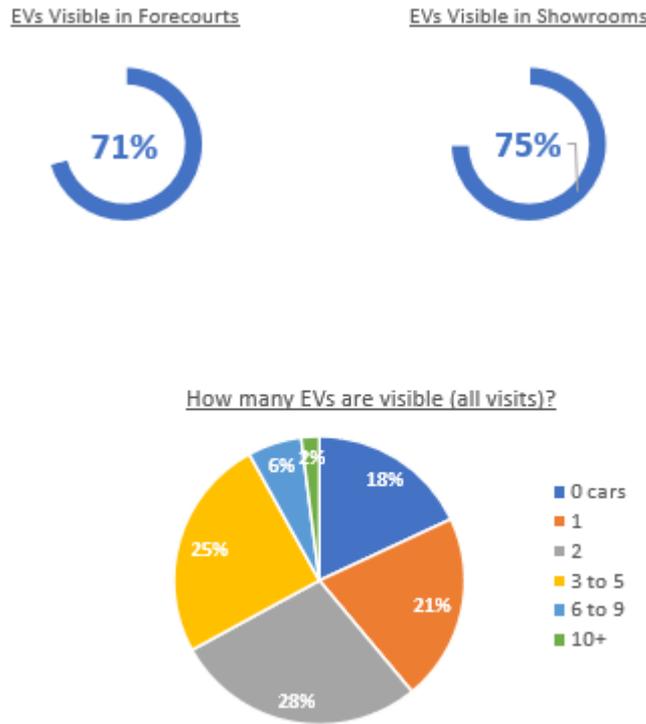


Figure 5. EV Visibility

In over half of the visits there was noted evidence of promotional EV material in use by the dealership. The following is a direct quote from one report: *“There were BEV vehicles out in the forecourt and in the showroom. There were two outside and two inside. They were prominently placed and there were several large, floor standing posters advertising the BEV power train.”*

75% of dealerships visited had an EV model available for test drive. It must be noted that due to semi-conductor shortages in the motor industry there are delays in the production and delivery of vehicles.



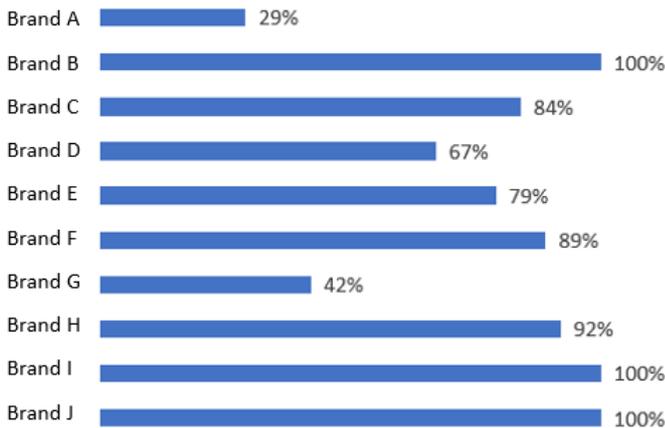
Figure 6. EV promotional material visibility

### Car Recommendation

In response to the opening neutral query, 57% of salespeople spontaneously mentioned EV as an option for consideration. The remaining 43% were then prompted by the shoppers about EVs and following the prompts a further 37% introduced EVs into the conversation. Out of 179 visits EVs were not mentioned or suggested as a viable option in 6% of visits equating to 11 out of 179 dealerships.

Shoppers were asked to record what type of vehicle the salespeople recommended after the interaction. Named models were recommended in 95% of the visits. No recommendation was made in the remaining 5%, with reasons cited including lack of stock and lack of knowledge of dealership staff member to put forward a recommendation.

EV Recommendations, Top 10 Selling Car brands



75% of final recommendations were for an EV, where EV refers to Battery Electric Vehicles (BEVs) and Plug-In Hybrid Electric Vehicle (PHEVs).

48% of shoppers were recommended BEVs, 27% were recommended PHEVs and 25% were recommended ICE vehicles, conventional and mild hybrids.

Figure 7 below, highlights the percentage of visits where an EV (BEV or PHEV) was recommended for the top ten selling car brands in Ireland, randomised order.

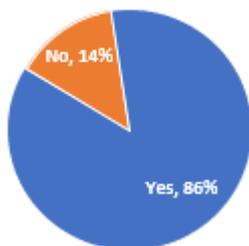
Figure 7. % of visits of top ten selling car brands where EV was recommended

### EV Knowledge

Government incentives and grants were mentioned in 86% of visits. Lower fuel costs, the SEAI EV grant, and the SEAI home charger grant were the three most-mentioned incentives (Figure 8). EV calculator and/or comparator tools only featured in 2% of visits.

Interestingly, incentives were mentioned more frequently when the conversation focussed on BEVs rather than PHEVs. Lower maintenance costs were mentioned in 68% of BEV conversations versus 43% of PHEV conversations.

Did the salesperson mention any Government Grants or Incentives for buying EVs?



If Yes, EV Government Grants or Incentives mentioned

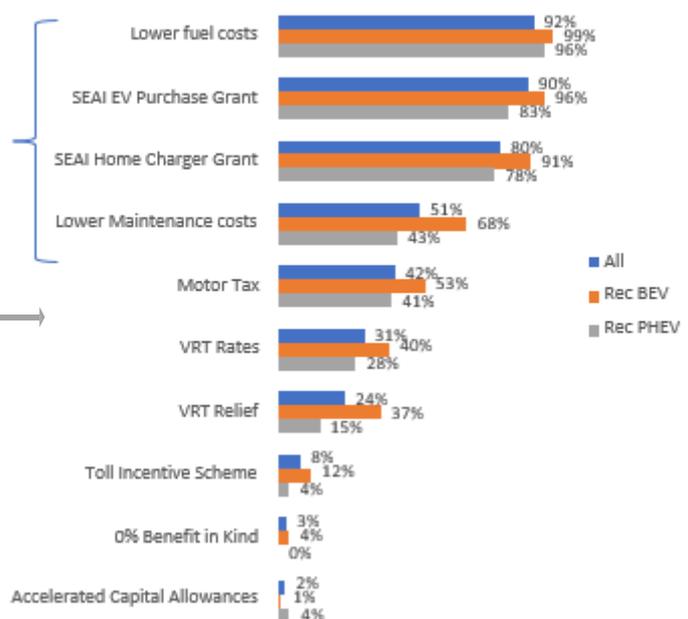


Figure 8. Government incentives and benefits of EVs mentioned

Figure 9 shows the three questions shoppers were instructed to ask if the topics did not come up naturally in the interaction. The figure shows whether a prompt was needed and if the information provided was correct or incorrect.

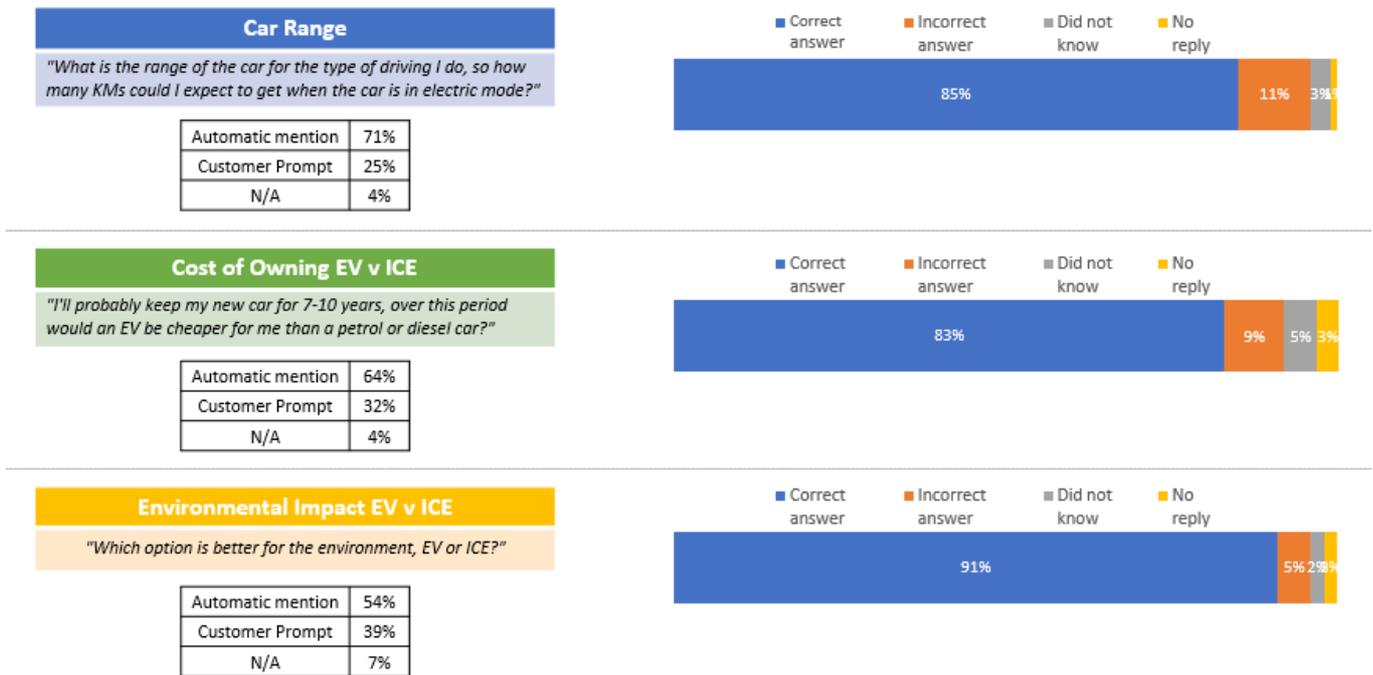
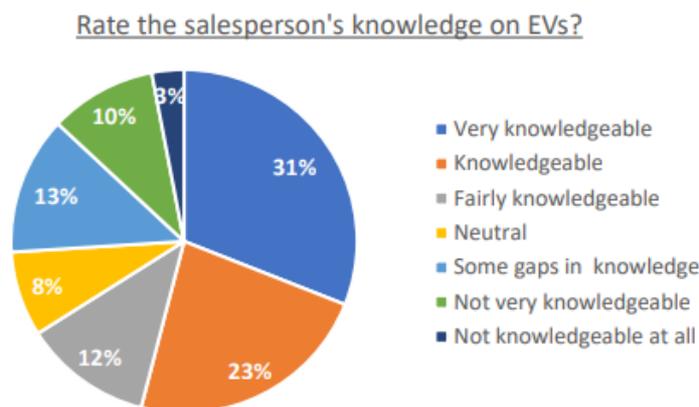


Figure 9. Responses to the three questions from Visit Approach

Salespeople provided inaccurate information about EVs which was negative in its nature in 23% of visits. For example, statements such as "They said over the long-term running costs wouldn't result in a great savings" emerged. Other themes around inaccurate negative information were environmental impact, reliability, battery life, insufficient public charging infrastructure and likelihood of grants being cut.



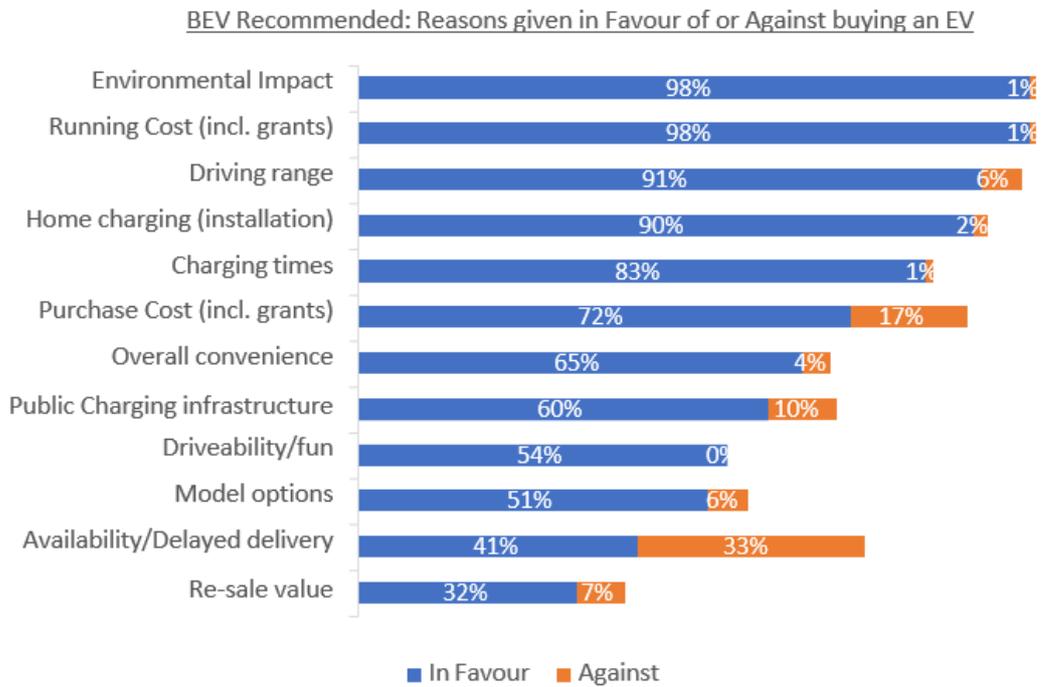
Shoppers rated 54% of the salespeople as "Very Knowledgeable" or "Knowledgeable". Shoppers noted salespeople had the knowledge about EVs but were not able or, not willing to communicate EV knowledge and three main themes were noted on this:

- Lack of EV knowledge or a reactive approach to EV sales "I only found out because I asked"
- Lack of EV model availability
- Costs or prospect of grants being cut

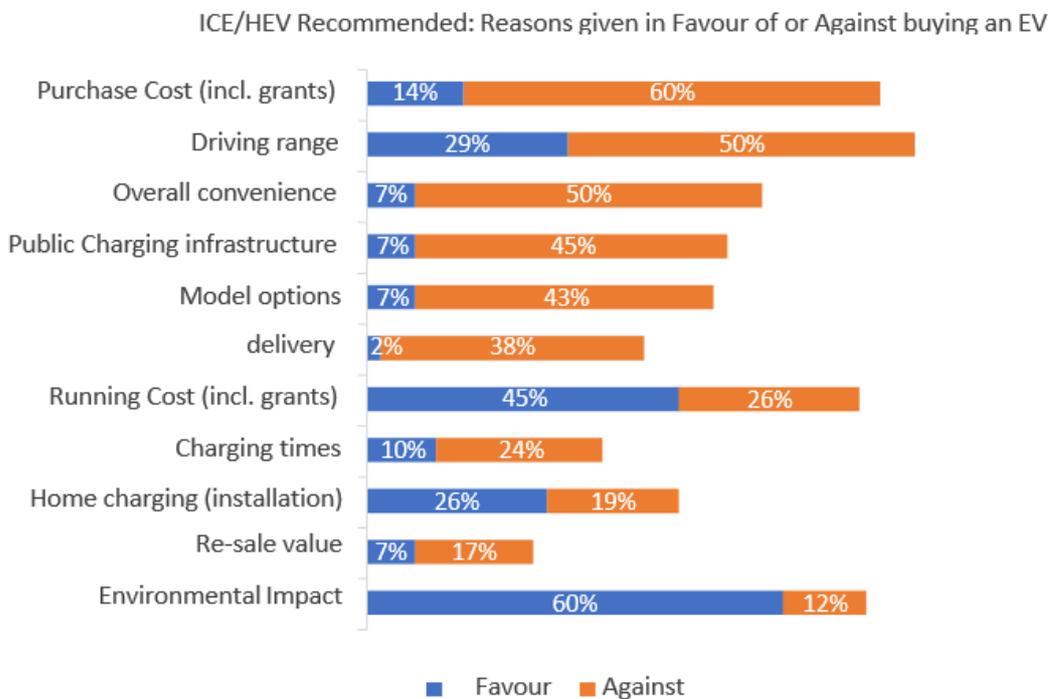
Figure 10. Responses to rate the salesperson's knowledge.

### Sales Approach

The following figures highlight the reasons given in support of the recommendation of a BEV (48% of recommendations) and ICE/conventional hybrid (25% of recommendations).



**Figure 11. Reasons for recommending a BEV**



**Figure 12. Reasons against EVs where ICE or conventional hybrid was recommended**

PHEV recommendations focussed on similar reasons to the Figure 10.

72% of shoppers were positive about trusting the information provided to them by the salespeople and just over half of shoppers recorded they were satisfied with the salesperson’s attitude towards EVs.

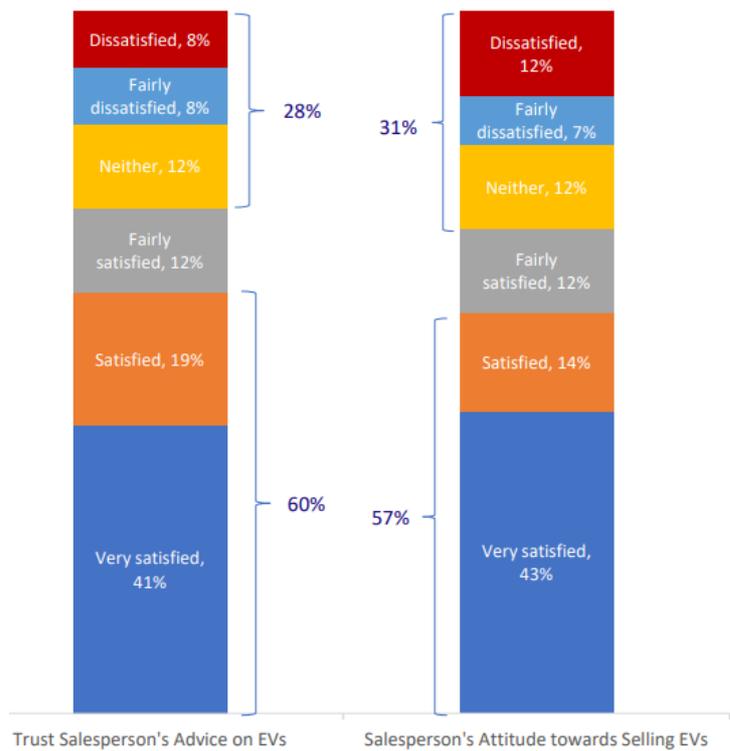


Figure 13. Shoppers’s trust and satisfaction with salesperson’s information and attitude

Overall Customer Experience

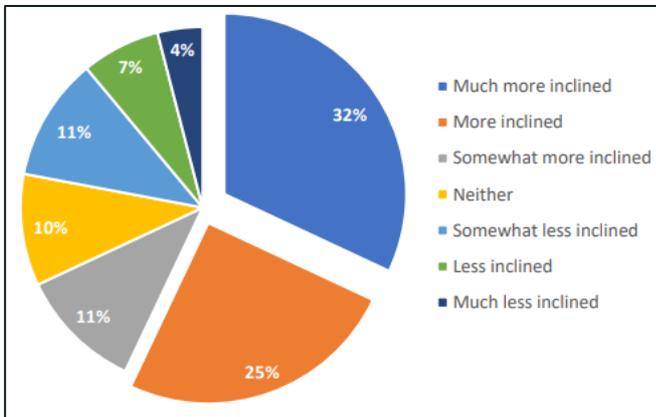


Figure 14. highlights the potential influence of salespeople on customers. The figure shows that a positive engagement and willingness to share advice and information regarding EVs at the point of sale can influence the likelihood for a customer to purchase an EV.

68% of shoppers said they were more inclined to buy an EV following their conversation with the salesperson.

Figure 14. How customer’s inclination to purchase EV has changed following salesperson interaction

Salesperson Influence over Customer Sales Experience	‘Much More Inclined’ & ‘More Inclined’ 102 Visits, Score 85%	‘Much Less Inclined’ to ‘Somewhat less Inclined’ 39 Visits, Score 28%
EVs visible at the dealership	93%	56%
Mention EV in response to customer’s opening enquiry	78%	20%
Recommended an EV to buy as the best option	98%	14%
Mention any Government Grants or Incentives for buying EVs	98%	41%
Salesperson: Very Knowledgeable or Knowledgeable	87%	5%
Salesperson: Sales Attitude Very Positive or Positive	93%	0%

Figure 15. Impact of positive customer experience on likelihood to purchase an EV

## Conclusion

Understanding the customer journey is a critical part of developing and implementing actions and policies to meet the targets set by government in respect to emission reduction in transport sector and number of EVs on Irish roads. SEAI have broken down the customer journey into various stages detailed in [Driving-Purchases-of-Electric-Vehicles-in-Ireland.pdf \(seai.ie\)](#). One of the stages identified is the point-of-sale interaction between the salesperson and the customer. Previous research by Zarazua de Rubens et al. (2018) and Matthews et al. (2017) found that this interaction can be a barrier to EV uptake. This study examines the interactions between the consumer and the salesperson in Ireland and highlights areas for action.

In comparison to other automotive mystery shopper programmes the overall score of 67% for this programme is relatively low. However, in some regard it could be considered as better than expected particularly when comparing with similar studies run internationally (Zarazua de Rubens et al. (2018), Matthews et al. (2017)). The results noted in this study and presented above, highlight a solid starting position from which the customer experience at point-of-sale interactions may be improved.

Overall, 68% of the dealerships visited did a good to excellent job of promoting EVs as the best option for the customer when buying a new vehicle. On the other hand, this is in comparison to 75% of visits returning a recommendation of EV while 25% of dealerships visited recommended an ICE or a mild or conventional hybrid. The main reasons for choosing an EV were environmental benefit, government incentives and lower running and maintenance costs.

From the results, dealerships are failing to make use of all the available information and tools. Only 2% of the visits featured the use/mention of an EV calculator or comparator tool. Despite SEAI developing and making available a free to use [Total Cost of Ownership calculator](#) and a [journey cost comparator](#) which will provide personalised results to the consumer. Comparison tools have huge potential to help consumers understand the total cost of ownership and overcome barriers to EV adoption such as range anxiety.

The results highlight an issue around sales staff communicating the positive messaging and knowledge of EVs to potential customers to aid their transition to EVs. Salespeople, some of whom were positive about EVs, displayed an inability or an unwillingness to provide customers with enough quality information about the benefits of EVs to convince customers to purchase. There may be a few reasons for this:

- Salespeople are uncomfortable with discussing and selling EVs. They may require further training around EVs, their technology and the medium of clearly communicating this to customers.
- ICE vehicles are an easier and quicker sale – there are no grants which need application and approval, lower return on after-sale servicing on EVs for the dealership, commission level on sales for EVs should be investigated for ICE vs EV sales etc.

Methods to address these issues include training programmes focusing on a “we will help you sell more cars” approach for the dealerships. This may be government or brand led or both. Such training actions would be mutually beneficial for the dealership, the staff, and the government.

The training may also address the gap between EV mentions and EV recommendations which was evident throughout the visits in this study. The impression of a reactive nature to EV sales in dealership staff shone through where EVs were mentioned spontaneously, after a neutral opening query, in just over half of the visits and following direct prompts from the mystery shoppers EVs were mentioned in 94% of the visits.

It was noted during the visits that government policy decisions surrounding EVs have a direct effect on EV sales. The results section above demonstrates that government grants and incentives comprise a large part of discussions regarding EVs. This study indicates that government grants and incentives are determining factors used by sales staff in the selling process to persuade customers EVs are the best option for them. Therefore, it is important to maintain the government provided incentives to encourage and reach the mass adoption phase of EV uptake in Ireland. The reaction of the PHEV market in 2022 to the removal of the PHEV purchase grant may provide a further insight. The removal of the PHEV grant from 1<sup>st</sup> Jan 2022 will allow us to track how the market responds to the removal of support. Is there a negative impact, a reduced level of growth or is the market self-sustaining regardless of the purchase grant?

One potential method to improve customer experience at the point of sale is to provide an incentive for dealerships and staff. SEAI are currently running their inaugural EV Dealership of the Year Award for 2022. 116 dealerships have registered themselves for consideration.

### Recommendations

- Improve level of knowledge amongst dealership staff about EVs nationally:
  - Encourage brands to provide further training
  - Build on the current education tools provided by SEAI through webinars and the Energy Academy
  - Support staff to engage and share their advice and knowledge at the point of sale in an enthusiastic manner
- Promote the benefits of driving an EV:
  - Run a large-scale communication campaign to highlight the benefits of going electric
  - Run roadshow events across the country to provide an opportunity for people to easily test drive an EV
- Encourage dealerships to utilise the SEAI EV comparator tool
- Track improvements in customer experience
  - -Re-run this study annually and benchmark the results
  - Identify actions that worked and did not work
- Provide support to switch to EVs
  - Retain the current suite of incentives at their current levels until the mass adoption segment of the EV adoption curve is attained in Ireland
  - Encourage brands to re-work their commission structure to favour EVs over ICE vehicles
  - Continue improving the SEAI grant system to ensure a speedy, easy to use, and efficient service for the EV dealership network
- Inform and reward EV dealerships
  - Provide a summary of this report to all dealerships and brands
  - Run the SEAI EV Dealership of the Year Awards as an annual event
    - Target full brand participation at a dealer level
  - Investigate expansion of dealership awards to incentivise the individual dealership staff
- Expand future studies to incorporate the second hand EV market in Ireland
  - Examine customer experience of purchasing second hand EVs
  - Investigate attitudes in the marketplace to customers trading in second hand EVs

## References

- Matthews, L., Lynes, J., Riemer, M., Del Matto, T., & Cloet, N. (2017). 'Do we have a car for you? Encouraging the uptake of electric vehicles at point of sale', *Energy Policy*, Vol. 100, pp. 79–88, <https://doi.org/10.1016/j.enpol.2016.10.001>
- SEAI (2020), 'Driving purchases of electric vehicles in Ireland'. [Driving-Purchases-of-Electric-Vehicles-in-Ireland.pdf \(seai.ie\)](https://www.seai.ie/~/media/SEAI/Files/Driving-Purchases-of-Electric-Vehicles-in-Ireland.pdf)
- Zarazua de Rubens, G., Noel, L., & Sovacool, B. K. (2018). 'Dismissive and deceptive car dealerships create barriers to electric vehicle adoption at the point of sale', *Nature Energy*, Vol. 3, Issue 6, pp. 501–507, <https://doi.org/10.1038/s41560-018-0152-x>

**Appendix – SEAI EV Questionnaire**

<b>SEAI: EV Questionnaire</b>	
Date shop performed	
Time of Visit:	
Length of Visit:	<i>Up to 10 mins                  10 to 20 mins                  20 to 30 mins                  30 to 40 mins                  Over 40 mins</i>
<b>EV Visibility</b>	
1.1 Did you get an opportunity to view cars in the forecourt?	Yes No
1.2 If Yes, as far as you could tell are EV's visible in the forecourt?	Yes No
1.3 Did you get an opportunity to view cars in the showroom?	Yes No
1.4 If Yes, as far as you could tell are EV's visible in the showroom?	Yes No
1.5 Based on what you were able to see, are EVs as visible as ICE models in this dealership in terms of placement?	Yes No
1.6 If 'No' to 1.5 why	
1.7 As far as you could see what types of EV cars were present?	<i>BEV                  PHEV                  None</i>
1.8 As far as you could see how many EV cars are visible?	<i>0                  1                  2                  3 to 5                  6 to 9                  10+</i>
1.9 Did you see any evidence of this dealership promoting the fact that they sell EVs, or have EV marketing information on display?	Yes No
1.9a Brief description of EV model Placement and Promotion in the dealership:	
1.10 If Yes to Q1.9, please tick what was visible:	<i>Promoted model                  Window advertising                  Forecourt stands/posters etc.                  Showroom                  stands/posters/brochures etc.                  EV Brochure, other marketing material                  Other</i>

1.11 If Other please describe:	
	<i>Very easy to see</i> <i>Easy to see</i> <i>Fairly easy to see</i> <i>Neutral</i> <i>Fairly difficult to see</i> <i>Difficult to see</i> <i>Very difficult to see</i>
1.12 If Yes to Q1.9, how visible was the EV promotion(s)/signage?	
1.13 Is there a demonstration model of the EV you were enquiring about available for test drive?	Yes No
1.14 If No, was a test drive offered in a different EV model?	Yes No
<h2>Car Recommendation</h2>	
2.1 Were you asked any qualifying questions about your driving requirements/habits?	Yes No
2.2 Were you asked whether you would consider an EV option?	Yes No
2.3 In response to your OPENING ENQUIRY was the FIRST car mentioned an EV or ICE model?	EV ICE
2.4 In response to your OPENING ENQUIRY did the salesperson mention EV as an option at all?	Yes No
2.5 If 'No' to Q2.4, in response to your <b>EV prompt</b> did the salesperson mention an EV option?	Yes No
2.6 If 'No' to Q2.4, in response to your <b>EV prompt</b> was the first car option mentioned an EV or ICE model?	EV ICE
2.7 Did the salesperson ultimately recommend a car to buy / suggest what would be the best option?	Yes No
2.8 If Yes, was a BEV, PHEV or ICE/HEV model recommended/suggested?	BEV PHEV ICE/HEV
2.9 If Yes to Q2.7, what car did the salesperson recommend you buy?	
2.10 If Yes to Q2.7, briefly record the main reasons given by the salesperson for recommending this car:	
<h2>EV Knowledge</h2>	
3.1 At any stage, did the salesperson offer an explanation of the differences between BEV, PHEV & HEV?	Yes No
3.2 If 'Yes', was the explanation correct?	Yes No
3.3 If 'No' to Q3.2 please explain:	
3.4 Did the salesperson mention any Government Grants or Incentives for buying EVs?	Yes No

<b>3.5 If Yes, indicate below which Grants and Incentives were mentioned:</b>	
a) SEAI Electric Vehicle Purchase Grant	Yes No
b) SEAI Home Charger Grant	Yes No
c) VRT Rates	Yes No
d) VRT Relief	Yes No
e) Motor Tax	Yes No
f) Toll Incentive Scheme	Yes No
g) 0% Benefit in Kind	Yes No
h) Lower Maintenance / Servicing costs	Yes No
i) Accelerated Capital Allowances	Yes No
j) Lower fuel costs	Yes No
3.6 Did the salesperson mention or use an EV/ICE calculator and/or comparison tool?	Yes use/show Yes mention No
3.7 If Yes, were these SEAI or car brand calculator/tools?	SEAI Car brand Both Could not tell
<b><u>Q3.8 Did the salesperson automatically mention any of the following issues when discussing EV options?</u></b>	
<b>A) The range the car has.</b>	Yes No, I had to ask N/A
"What is the range of the car for the type of driving I do, so how many KMs could I expect to get when the car is in electric mode?"	Correct Incorrect Did not know No reply
Record the reply:	
<b>B) The cost of owning and running EV V ICE car.</b>	Yes No, I had to ask N/A
"I'll probably keep my new car for 7-10 years; over this period would an EV be cheaper for me than a petrol or diesel car?"	Correct Incorrect Did not know No reply
Record the reply:	

<b>C) The impact that EV or ICE models have on the environment.</b>	Yes No, I had to ask N/A
"Which option is better for the environment, EV or ICE?"	Correct Incorrect Did not know No reply
Record the reply:	
3.9 Were you provided with any inaccurate information that was positive about EVs?	Yes No
If Yes, please record here the inaccurate information that was provided:	
3.10 Were you provided with any inaccurate information that was negative about EVs?	Yes No
If Yes, please record here the inaccurate information that was provided:	
3.11 Based on the conversation you had with the salesperson rate his/her knowledge about EVs	Very knowledgeable Knowledgeable Fairly knowledgeable Neutral Some gaps in knowledge Not very knowledgeable Not knowledgeable at all
<b>Sales Approach</b>	
<b>4.1 Indicate below the REASONS given by the salesperson IN FAVOUR OF or AGAINST buying an EV:</b>	
a) Purchase Cost (including grants)	Reason in Favour Reason Against Not mentioned N/A
b) Running Cost (including grants)	Reason in Favour Reason Against Not mentioned N/A
c) Range of model choice or version options	Reason in Favour Reason Against Not mentioned N/A
d) Re-sale value	Reason in Favour Reason Against Not mentioned N/A
e) Environmental Impact	Reason in Favour Reason Against Not mentioned N/A

	<i>Reason in Favour</i> <i>Reason Against</i> <i>Not mentioned</i> <i>N/A</i>
f) Driving range	<i>Reason in Favour</i> <i>Reason Against</i> <i>Not mentioned</i> <i>N/A</i>
g) Public Charging infrastructure	<i>Reason in Favour</i> <i>Reason Against</i> <i>Not mentioned</i> <i>N/A</i>
h) Home charging (installation)	<i>Reason in Favour</i> <i>Reason Against</i> <i>Not mentioned</i> <i>N/A</i>
i) Charging times	<i>Reason in Favour</i> <i>Reason Against</i> <i>Not mentioned</i> <i>N/A</i>
j) Overall convenience	<i>Reason in Favour</i> <i>Reason Against</i> <i>Not mentioned</i> <i>N/A</i>
k) Availability/Delayed delivery	<i>Reason in Favour</i> <i>Reason Against</i> <i>Not mentioned</i> <i>N/A</i>
l) Driveability/fun	<i>Reason in Favour</i> <i>Reason Against</i> <i>Not mentioned</i> <i>N/A</i>
m) Margin	<i>Reason in Favour</i> <i>Reason Against</i> <i>Not mentioned</i> <i>N/A</i>
n) Other	<i>Reason in Favour</i> <i>Reason Against</i> <i>Not mentioned</i> <i>N/A</i>
If Other, please explain:	
4.2 Based on the sales conversation you had; what statement best describes the salesperson's attitude towards selling you an EV?	<i>Very positive</i> <i>Positive</i> <i>Fairly Positive</i> <i>Neutral: neither solely positive or negative</i> <i>Fairly negative</i> <i>Negative</i> <i>Very negative</i>

<p>4.3 Based on the salesperson's approach and information provided, how satisfied are you that you can trust this salesperson as a good source of information about EVs</p>	<p><i>Very satisfied</i>  <i>Satisfied</i>  <i>Fairly satisfied</i>  <i>Neutral</i>  <i>Fairly dissatisfied</i>  <i>Dissatisfied</i>  <i>Very dissatisfied</i></p>
<p>Provide comments below on how the salesperson steered the conversation towards or away from buying an EV? (what was mentioned, what were the main reasons)</p>	
<p><b>Overall Customer Experience</b></p>	
<p>5.1 Do you feel more or less inclined to buy an EV following your conversation with this salesperson</p>	<p><i>Much more inclined</i>  <i>More inclined</i>  <i>Somewhat more inclined</i>  <i>Neither less inclined or more inclined</i>  <i>Somewhat less inclined</i>  <i>Less inclined</i>  <i>Much less inclined</i></p>
<p>5.2 In a real situation and based on the information and advice you received, would you be more likely to buy an EV or an ICE car in this dealership?</p>	<p><i>EV</i>  <i>ICE</i></p>



Riailas na hÉireann  
Government of Ireland

**Sustainable Energy Authority of Ireland**

Three Park Place  
Hatch Street Upper  
Dublin 2  
Ireland  
D02 FX65

e [info@seai.ie](mailto:info@seai.ie)  
w [www.seai.ie](http://www.seai.ie)  
t +353 1 808 2100

