

What Electric Drivers Want:

# Decoding the Human Mindset Behind EV Adoption

In 2023, almost 14 million of EVs were sold globally, marking a 35% increase from the previous year.<sup>1</sup> The electric vehicle (EV) revolution is in full swing, and the vision of a fully electric future is driving extraordinary changes across the automotive industry.

## Accenture's recent survey of 6,000 car owners in six key markets worldwide reveals the following insights:

The future is electric

**57%**

of drivers plan to adopt an EV within the next decade.

Key factors for adoption

**Reliability,**

safety, and value for money are crucial in attracting new EV customers.

China leads the way

**44%**

of non-EV owners in China plan to buy an EV within five years.

Omnichannel experience

**A balanced mix**

of online and in-person interactions is essential for enhancing customer experience and operational efficiency.

Human-centric approach

**Focusing**

on human needs and attitudes, not just customer needs, is vital.

Automakers need to adjust their strategies to cater to five "mindsona" segments that will drive the mainstream EV market.

**These mindsonas provide deep insights into the motivations and desires of potential EV buyers and are crucial for crossing the chasm between early adopters and the mainstream. Who are they?**



Mindsona

**Individualist**

Hedonistic, future-oriented, individualistic

40.1 years (avg.), 38% female

**25%**

Drivers/Barriers

**Predominantly Pro EVs**

**Cutting-edge technology and status symbols**  
EVs are seen as advanced technology and symbols of status.

**Unique designs**  
EVs with unique designs that inspire fun, adventure, and luxury features, enhancing social standing and well-being.

Opportunity

**Market EVs as customizable options that cater to individual lifestyles, emphasizing high-end designs and cutting-edge technology.**



Mindsona

**Carer**

Socially oriented, environmental, health and well-being focused.

51.8 years (avg.), 53% female

**21%**

Drivers/Barriers

**Primarily Pro EVs**

**Environmentally and socially responsible**  
Models that reduce carbon footprints and use sustainable materials.

**Practical ownership**  
EV models that address the challenges of ownership.

**Regulatory compliance**  
EV models that meet environmental regulations and promote health and well-being.

Opportunity

**Market and promote the ethical and ecological benefits of EVs, emphasizing sustainable manufacturing and materials.**



Mindsona

**Strategist**

Future-focused, affluent, values luxury and innovation.

43.6 (avg.), 43% female.

**20%**

Drivers/Barriers

**Strongly Pro EVs**

**Attracted to luxury and high-end EVs**

These individuals see high-quality EVs as symbols of status, enhancing their social standing and standard of living.

**Aspirational life-style**  
EVs elevate their aspirations for a luxurious lifestyle and align with their desire for social recognition.

Opportunity

**Market EVs as a status symbol by highlighting luxury and high-end designs and cutting-edge features.**



Mindsona

**Conservative**

Security-oriented, prefers familiarity and reliability

45.6 (avg.), 55% female.

**17%**

Drivers/Barriers

**Predominately Contra EVs**

**Resistance to change**  
Discomfort with adopting new and unfamiliar technology.

**Practical concerns**  
Worries about adapting to new driving habits, charging times, and refueling processes, which may conflict with their need for reliable transportation.

Opportunity

**EV market strategy should focus on reliability, offering respective data, advanced safety features, and extended test drives.**



Mindsona

**Frugal**

Modest lifestyle, price-sensitive, non-materialistic

49.5 (avg.), 50% female.

**17%**

Drivers/Barriers

**Mostly Contra EVs**

**Cost concerns**  
Higher upfront costs compared to traditional vehicles.

**Simple lifestyle**  
Not driven by a desire for extraordinary experiences or material possessions.

**Technology indifference**  
High-tech features do not align with their basic, straightforward lifestyles.

Opportunity

**EVs market strategy should emphasize long-term cost savings and practical benefits of electrical vehicles, such as reduced fuel and maintenance.**

As we steer towards an electric vehicle (EV) future, the journey may have its challenges, but the destination is clear and promising.

By concentrating on effective cost management, enhancing life-centric customer experiences, and building strong partnerships, EV automakers can successfully navigate this transition.

Let's keep the momentum going and drive towards a sustainable, electric future for both businesses and consumers.

**Join us on this journey and be part of the change!**

<sup>1</sup>Goldman Sachs (2024), Electric Vehicles: What's Next IX: Time for Hybrids

Copyright © 2024 Accenture. All rights reserved.