

NYSERDA Drive Clean Rebate Adoption Survey - 2024 Results

Final Report

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Abstract

This report summarizes the results of a survey of rebate recipients who adopted an electric car while participating in the New York State Energy Research and Development Authority’s (NYSERDA) Drive Clean Rebate program in 2024. The program offered point-of-sale rebates on new car purchases and leases for eligible electric cars. Invitations to participate in this “Adoption Survey” were sent via email to a total of 42,498 rebate recipients, at the time of this report, resulting in 5,292 complete responses. Survey results are grouped by technology type, i.e., plug-in hybrid electric vehicles (PHEVs) and battery electric vehicles (BEVs). Results summarize purchasing decisions, the impact of the rebate on purchases, the role of dealers, electric car charging access and behaviors, and the demographic characteristics of electric car adopters.

Keywords

Electric cars, plug-in electric hybrid vehicles (PHEVs), battery electric vehicles (BEVs), Drive Clean Rebate program, point-of-sale rebates, rebate importance, *Rebate Essentiality*, auto dealers, electric car adoption.

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Acronyms and Abbreviations

BEV	battery electric vehicle
CSE	Center for Sustainable Energy
NYSERDA	New York State Energy Research and Development Authority
PHEV	plug-in hybrid electric vehicle

Executive Summary

NYSERDA's Drive Clean Rebate Program provides point-of-sale rebates to consumers who purchase or lease eligible new plug-in hybrid electric vehicles (PHEVs) or battery electric vehicles (BEVs). The program launched in March 2017 and is administered by the Center for Sustainable Energy (CSE). Participants in the program are invited to take an Adoption Survey after their application for the rebate has been approved. The survey is voluntary and used to gain insight on electric car adoption decisions and experience. This report summarizes findings for rebated vehicles purchased or leased between January 1, 2024 and December 31, 2024.

At the time of this report, a total of 42,498 program participants¹ received a rebate for vehicles acquired in 2024 and were invited to the survey. In total, 5,292 completed the survey, constituting a 12% response rate.² Survey data were then weighted to better represent the larger population of program participants.

The key findings include the following:

- Nearly two-thirds (65%) of the survey respondents acquired a BEV and 35% acquired a PHEV.
- Respondents typically replaced, or will replace, a car with their rebated electric car (83%).
- The replaced, or to-be-replaced, cars were largely conventional gasoline-powered: 62% of respondents replaced a gasoline car and 7% replaced a conventional hybrid car.
- Most respondents are first time electric car owners, 75% of respondents indicated that the rebated car is their first electric car.
- Almost three-quarters (73%) of respondents answered the Drive Clean rebate was “extremely important” or “very important” in making it possible for them to acquire their electric car.
- Nearly half (48%) of respondents stated they would not have acquired their electric car without the rebate, a similar percentage as last year's results of 46%.
- Most respondents live in a detached home (77%) and charge their electric car at home (78%).
- In total, 16% percent of program participants reside in a disadvantaged community (DAC), a slight decrease from 19% in the last report.
- Respondents residing within DACs tended to have lower income, with 64% having household income below \$150,000 compared to 46% respondents residing outside a DAC.

1 Introduction

NYSERDA’s Drive Clean Rebate program provides point-of-sale rebates to consumers who purchase or lease eligible new plug-in hybrid electric vehicles (PHEVs) or battery electric vehicles (BEVs). The program launched in March 2017 and is administered by the Center for Sustainable Energy (CSE). One component of the program is the voluntary “Adoption Survey,” which is used to gain insights into electric car adoption decisions, program performance and efficacy perceptions, and participating households’ demographic characteristics. This report summarizes the survey results and highlights key Drive Clean Rebate program trends.

1.1 Survey Administration and Response Rate

The Drive Clean Rebate Adoption Survey is administered on a rolling basis. Program participants receive a survey invitation by email approximately 1–3 weeks after approval of their rebate. The participants in this analysis purchased or leased cars between January 1, 2024 and December 31, 2024. A total of 42,498 participants³ were invited to take the survey and 5,430 responded. The respondents completed the survey between January 30, 2024 and March 5, 2025. One hundred and thirty-eight (138) respondents were disqualified for one of three reasons: their rebate was for a different car⁴, their car was primarily for commercial use, or they were not the primary driver of the car. After eliminating these responses, a total of 5,292 (12% response rate) valid responses were analyzed in this report.

1.2 Representativeness and Weighting

Since not all Drive Clean Rebate recipients complete the Adoption Survey, responses may not be representative of the entire participant population. To mitigate this issue, response weights were created to compensate for over- or under-representation among groups using application data that is available for all program participants. The dimensions used for weighting were rebated car model, purchase versus lease, county, and technology type (BEV/PHEV). Weights were calculated using iterative proportional fitting, or the raking method.⁵ During the weighting process, 102 rebate recipients were excluded from the participant population because no corresponding survey response was represented in one or more of the strata used to weight. Weighted responses are presented in this report and represent applicants who purchased or leased their cars between January 1, 2023 and December 31, 2023. A summary of the participant population represented, survey sample size, and weighting method and dimensions can be found in Table 1.

Table 1. Drive Clean Rebate Adoption Survey Sample Size And Representativeness

Details	Sample Size and Representativeness
Program Participant Population	N = 42,396 ^a
Responses in Data Set	n = 5,292 (12%)
Weighting Method	Iterative Proportional Fitting (Raking)
Representative Dimensions	Rebated Car Model, Purchase vs. Lease, County, Technology Type

^a 102 rebate recipients were excluded from the program population of 42,498 because no corresponding survey response was represented in one or more of the strata used to weight.

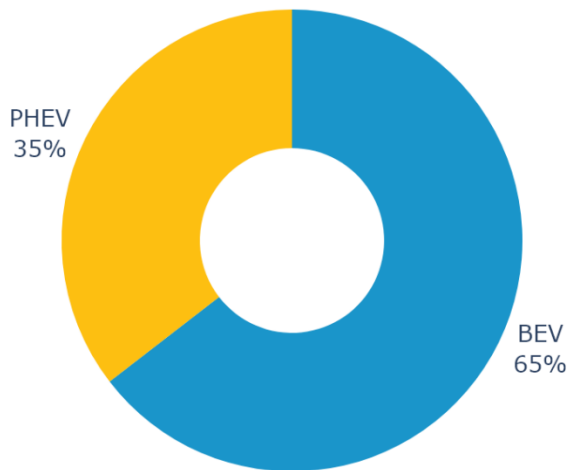
2 Results

2.1 Technology Types

Figure 1 shows the distribution of survey respondents by rebated electric car type after responses were weighted; 65% of survey responses collected were from respondents who were rebated for a BEV and 35% were from respondents who were rebated for a PHEV. These percentages align with the proportion of rebates going to these technology types during the reporting period. Slightly less BEVs were rebated for vehicles purchased or leased in 2024 compared to 2023, where 70% of program participants acquired BEVs and 30% acquired PHEVs.

Figure 1. Survey Responses By Technology Type Acquired

(n = 5,292)

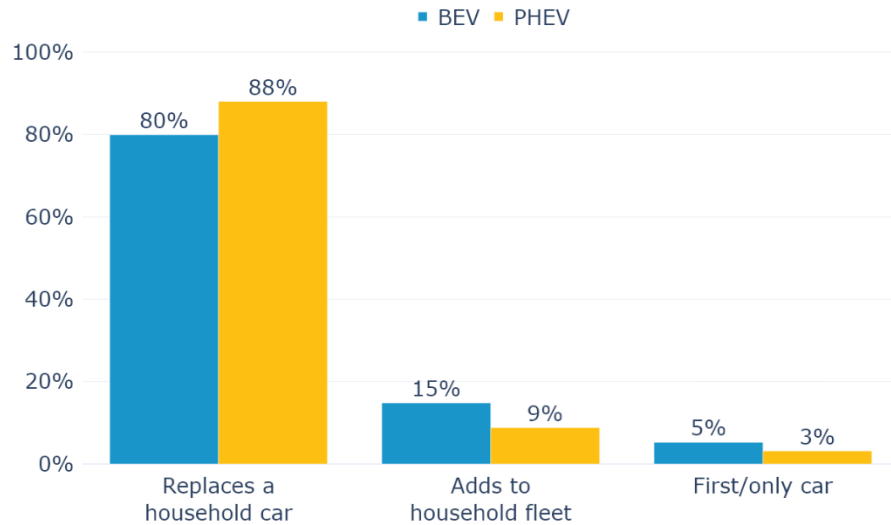


2.2 Adoption Decisions

Overall, 83% of survey respondents indicated that the electric car had replaced or would replace another household car, while 13% reported that the car was an addition to the household fleet. Figure 2 shows car replacement status by technology type. Those who adopted a PHEV were significantly more likely to replace (or plan to replace) a car in the home than those who adopted a BEV.

Figure 2. Responses to “Which Of The Following Best Describes Your New Electric Car Purchase Or Lease?” By Technology Type Acquired

Responses from BEV and PHEV consumers are significantly different (chi-squared test: $\chi^2 = 55$, $p < 0.01$, $n = 5,268$).



Sixty-nine (69%) percent of survey respondents replaced (or plan to replace) a conventional gasoline-powered car. This is comprised of 62% of respondents who replaced a gasoline-powered car and 7% of respondents who replaced a conventional-hybrid. Figure 3⁶ shows the difference in vehicle technology type replacements between BEV and PHEV survey respondents. Survey respondents who previously owned a BEV or PHEV were more likely to replace their car with the same technology type. Seventy-five (75%) percent of respondents reported that this was the first electric car they had purchased or leased. Figure 4 shows that those who adopted a PHEV were significantly more likely to be first-time electric car owners than those who adopted a BEV.

Figure 3. Technology Of Replaced Cars By Technology Type Acquired

Responses from BEV and PHEV consumers are significantly different (chi-squared test: $\chi^2 = 833$, $p < 0.01$, $n = 4,324$).

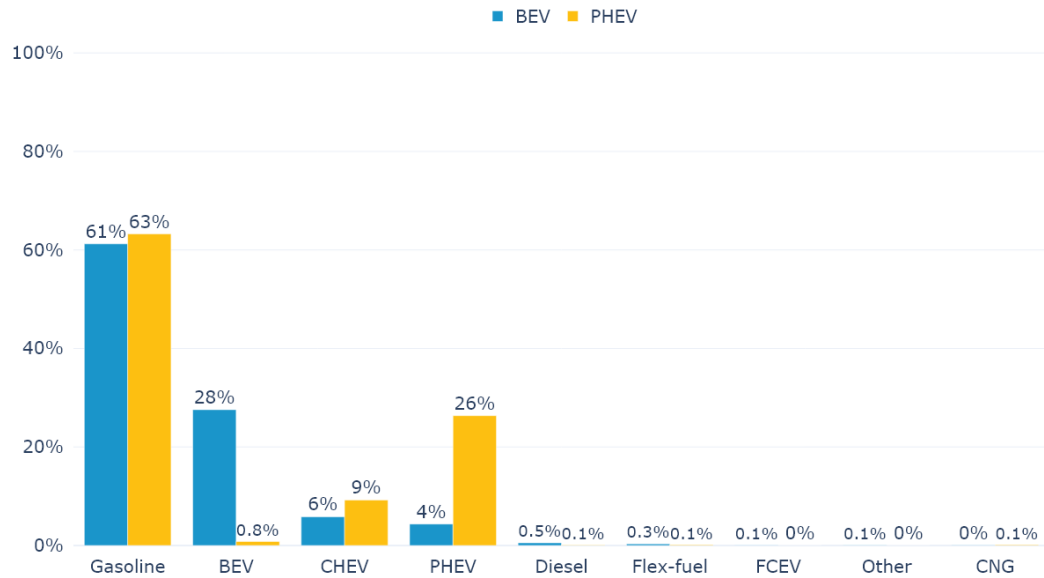
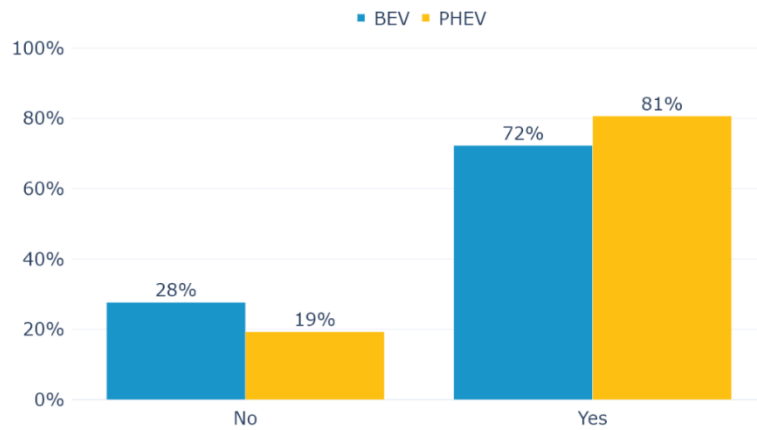


Figure 4. Responses To “Is This The First Electric Car You Have Ever Purchased Or Leased?” By Technology Type Acquired

Responses from BEV and PHEV consumers are significantly different (chi-squared test: $\chi^2 = 45$, $p < 0.01$, $n = 5,272$).

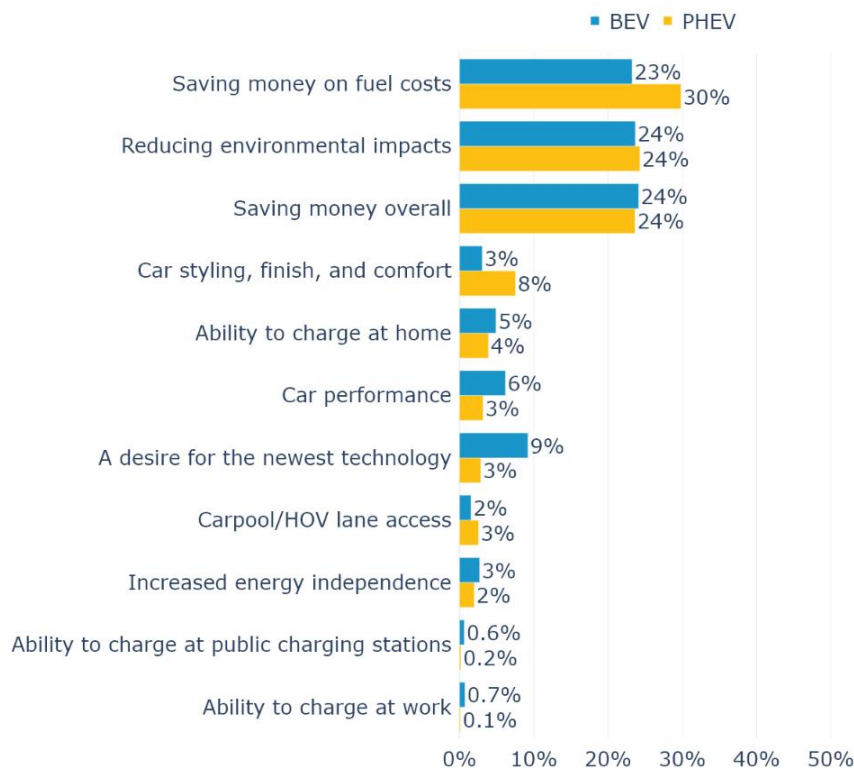


Respondents were asked to choose among a few options the most important reason they decided to acquire an electric car (Figure 5). Across all respondents, the top reasons were “Saving money on fuel costs” (26%), “Reducing environmental impacts” (24%), and “Saving money overall” (24%). These three

factors remain the most important reasons for acquiring an electric car, as prior survey analysis (2017-2023) have reflected similar results. BEV respondents were more likely to select “a desire for the newest technology” than PHEV respondents in the survey. PHEV respondents were more likely to indicate “saving money on fuel costs” and “car styling, finish, and comfort” as important factors in their decision.

Figure 5. Responses To “Which Of These Factors Was The Most Important Reason Why You Decided To Acquire An Electric Car?” By Technology Type Acquired

Responses from BEV and PHEV consumers are significantly different (chi-squared test: $\chi^2 = 190$, $p < 0.01$, $n = 5,271$).

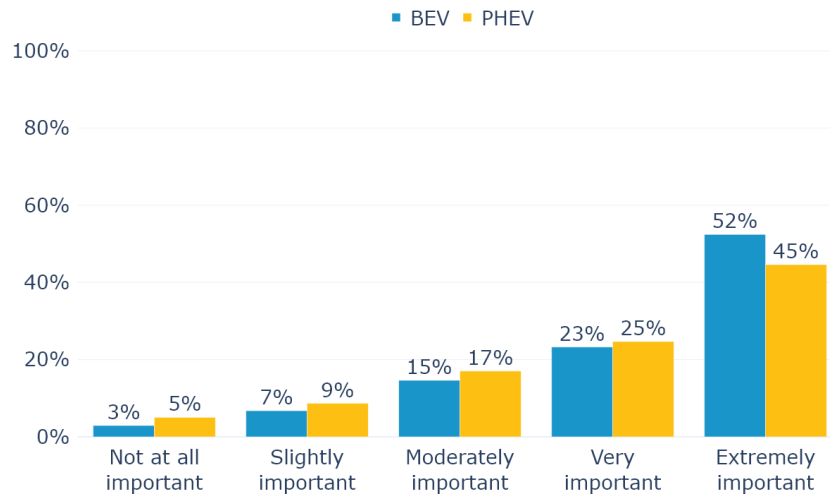


2.3 Program Impact

Respondents were asked several questions to determine how essential the NYSERDA Drive Clean Rebate was for their purchase. Approximately 73% rated the rebate as “extremely important” or “very important” in making it possible for them to acquire their car (Figure 6).

Figure 6. Responses To “How Important Was The State Drive Clean Rebate In Making It Possible For You To Acquire Your Electric Car?” By Technology Type Acquired

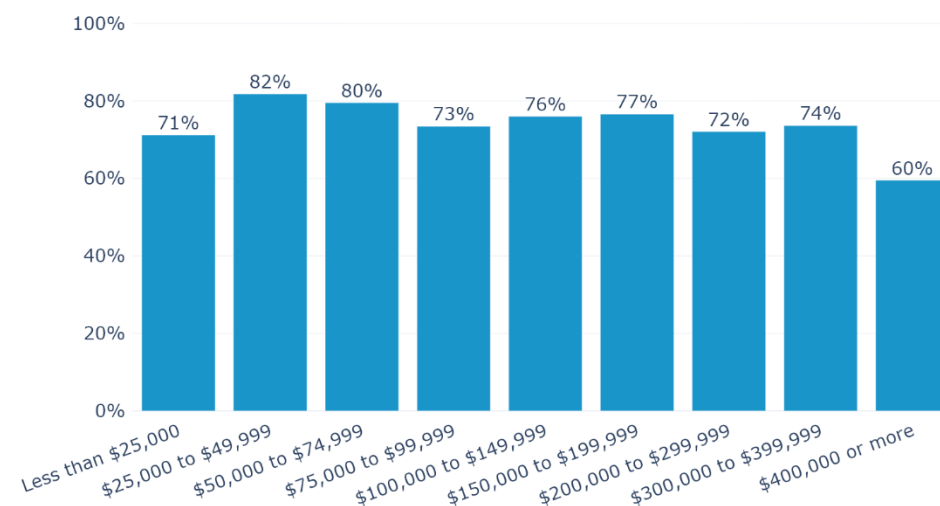
Responses from BEV and PHEV consumers are significantly different (chi-squared test: $\chi^2 = 39$, $p < 0.01$, $n = 5,078$).



Generally, there is not a linear relationship between a survey respondent’s income and the importance they assigned the Drive Clean rebate (Figure 7). For income levels below \$200,000, the percentage describing the rebate as very or extremely important ranges between 71% and 82% with some differences between the groups. There is a drop-off in importance for those who reported a household income of \$200,000 or more, though a minor uptick of 2% for income levels between \$300,000 to \$399,999.

Figure 7. Percent Of Respondents Who Stated That The Rebate Was “Very Important” Or “Extremely Important” By Income Level

($n = 5,907$)



Two questions were asked about the hypothetical purchase or lease decisions in the absence of the rebate, which were “Would you have purchased/leased your electric car without the state car rebate (Drive Clean Rebate)?” (Figure 8) and “If the drive clean rebate were not available for electric cars, would you still have purchased/leased the same car?” (Figure 9). Approximately 52% of respondents reported that they would not have purchased their electric car without the Drive Clean Rebate, indicating that the rebate was essential to acquiring their car. This is an increase from last year’s results of 46%.

Figure 8. Responses To “Would You Have Purchased/Leased Your Electric Car Without The State Car Rebate (Drive Clean Rebate)?” By Technology Type Acquired

Survey respondents are considered rebate essential if they responded “No” to the question, and those that responded “Yes” are not rebate essential. Responses from BEV and PHEV consumers are not significantly different (chi-squared test: $\chi^2 = 2$, $p < 0.15$, $n = 5,283$).

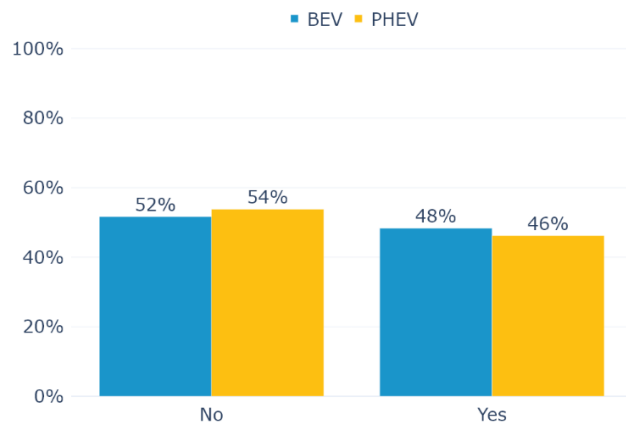
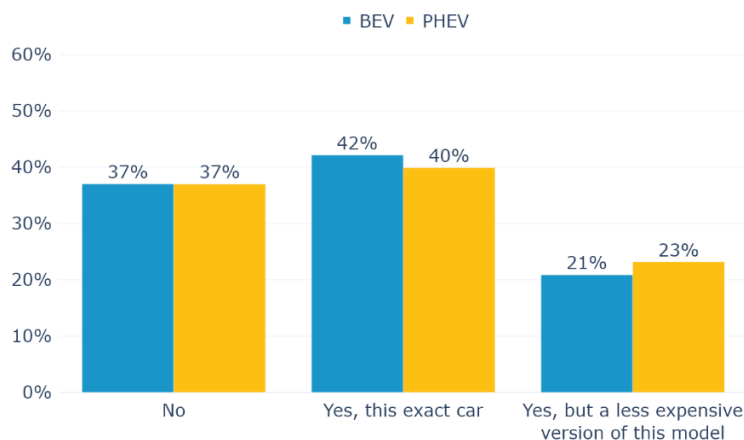


Figure 9. Responses To “If The Drive Clean Rebate Were Not Available For Electric Cars, Would You Still Have Purchased/Leased The Same Car?” By Technology Type Acquired

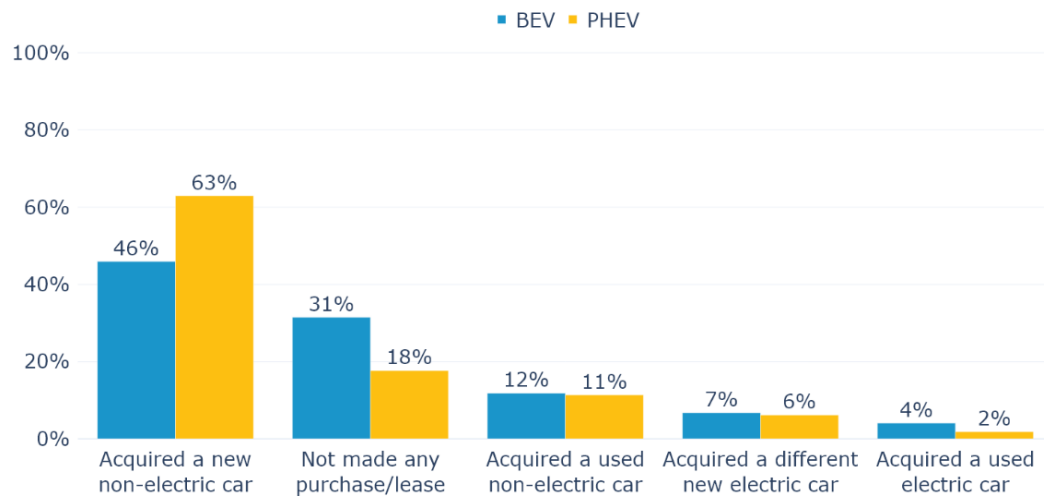
Responses from BEV and PHEV consumers are not significantly different (chi-squared test: $\chi^2 = 4$, $p < 0.11$, $n = 5,279$).



Respondents who answered “No” to the question “If the Drive Clean Rebate were not available for electric cars, would you still have purchased/leased the same car?” were asked a follow-up question about what purchase they would have made. Figure 10 shows that BEV respondents were likelier to report that they would not have made any purchase at all compared to PHEV respondents, while PHEV respondents were likelier to purchase a new non-electric car compared to BEV respondents.

Figure 10. Responses To “If The Drive Clean Rebate Were Not Available For Electric Cars, What Would You Most Likely Have Done?” By Technology Type Acquired

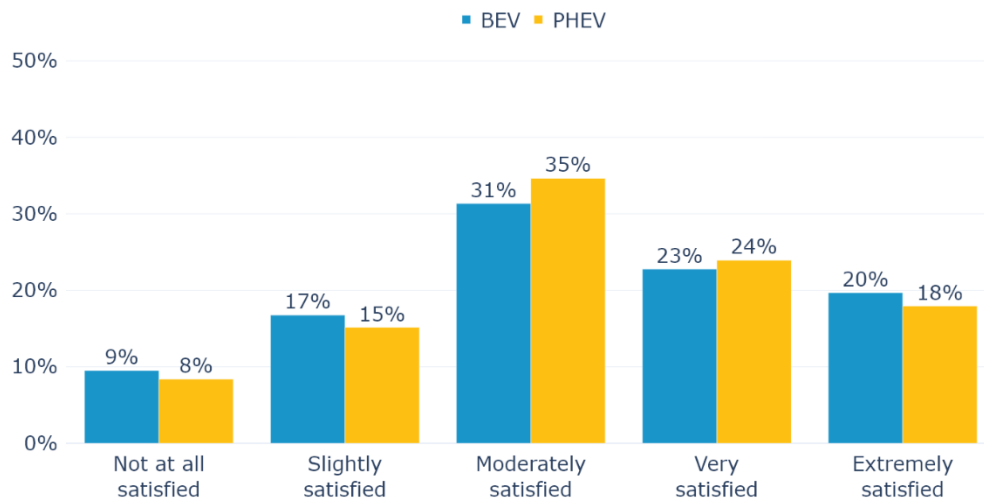
Responses from BEV and PHEV consumers are significantly different (chi-squared test: $\chi^2 = 64$, $p < 0.01$, $n = 1,948$).



Overall, 42% of respondents reported being extremely satisfied or very satisfied with the amount of the rebate. Figure 11 shows that PHEV respondents reported slightly higher levels of satisfaction with the rebate amount than BEV respondents.

Figure 11. Satisfaction With The Amount Of The Rebate By Technology Type Acquired

Responses from BEV and PHEV consumers are significantly different (chi-squared test: $\chi^2 = 10$, $p < 0.05$, $n = 4,988$).



2.4 Dealership Experience

Dealers appear to be broadly aware of the Drive Clean Rebate, with 72% of respondents reporting that their dealer was aware of the rebate when the respondent first visited the dealership (Figure 12).

Compared to last year, this is a 7% increase in dealership awareness of the rebate. Respondents had a lower initial awareness of the rebate than dealers with only 51% of respondents indicating that they were aware of the rebate before visiting a dealership. Figure 13 shows the differences in initial awareness of the rebate between BEV and PHEV respondents, with BEV respondents more likely than PHEV respondents to be aware of the rebate prior to visiting a dealership.

Figure 12. Responses To “Did Your Dealer Know About The Drive Clean Rebate When You First Went To Visit Them?” By Technology Type Acquired

Responses from BEV and PHEV consumers are significantly different (chi-squared test: $\chi^2 = 11$, $p < 0.01$, $n = 5,270$).

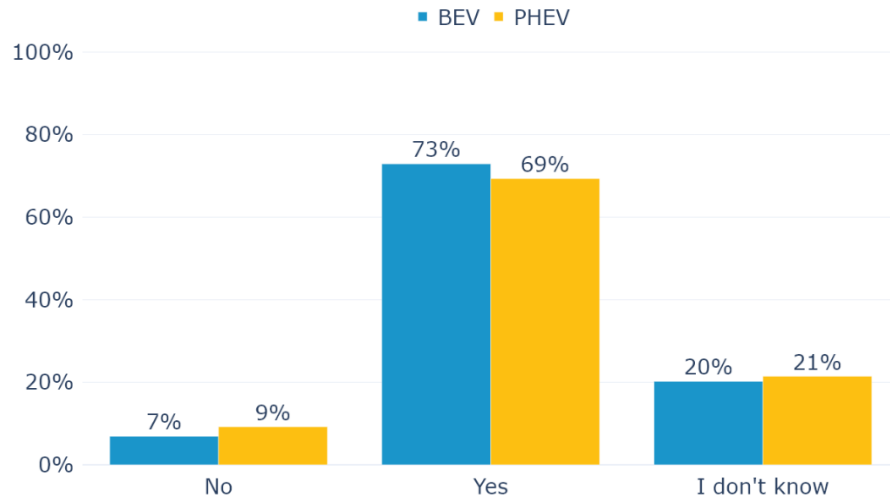
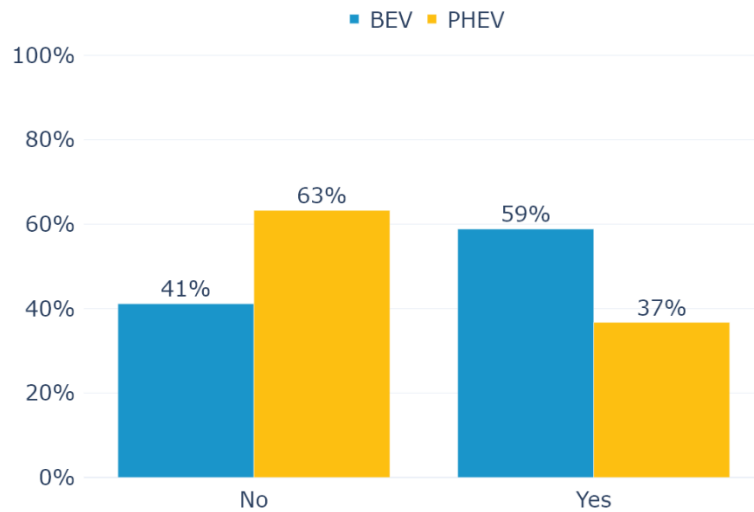


Figure 13. Responses To “Had You Heard About The Drive Clean Rebate Before You Visited A Dealership?” By Technology Type Acquired

Responses from BEV and PHEV consumers are significantly different (chi-squared test: $\chi^2 = 236$, $p < 0.01$, $n = 5,282$).



2.5 Charging

Over three-quarters of respondents (78%) charge their electric car at home, with 11% indicating plans to start charging at home. Figure 14 shows the distribution between BEV and PHEV respondents. For workplace charging, BEV respondents were more likely to have charging opportunities at or near their workplace (Figure 15).

Figure 14. Charging At Home By Technology Type Acquired

Responses from BEV and PHEV consumers are significantly different (chi-squared test: $\chi^2 = 28$, $p < 0.01$, $n = 5,266$).

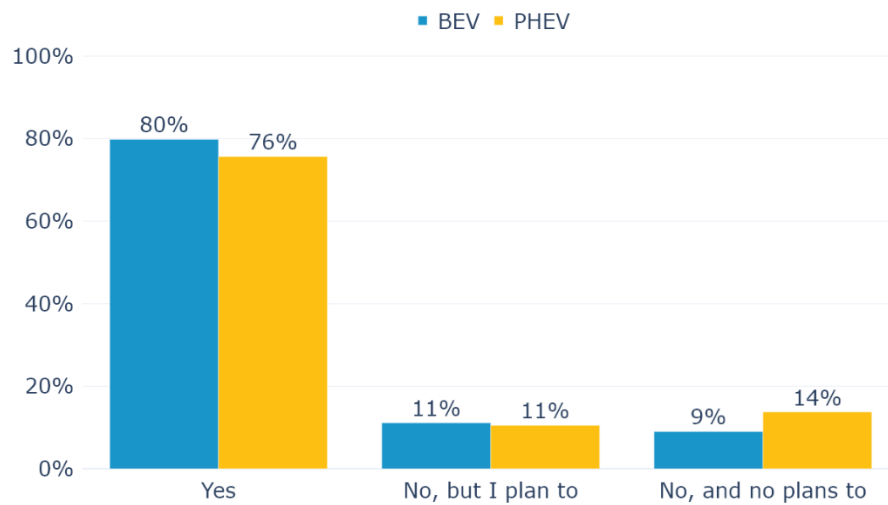
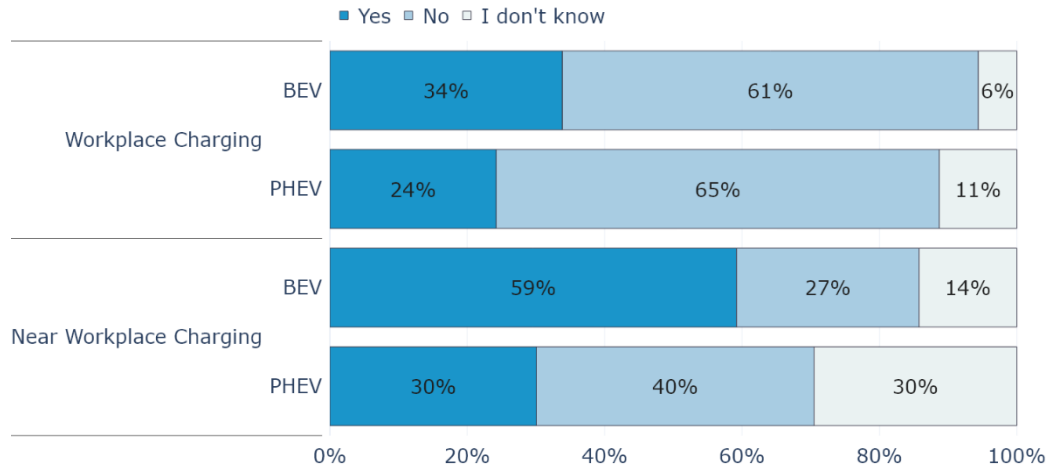


Figure 15. Access To Charging At Or Near Work By Technology Type Acquired

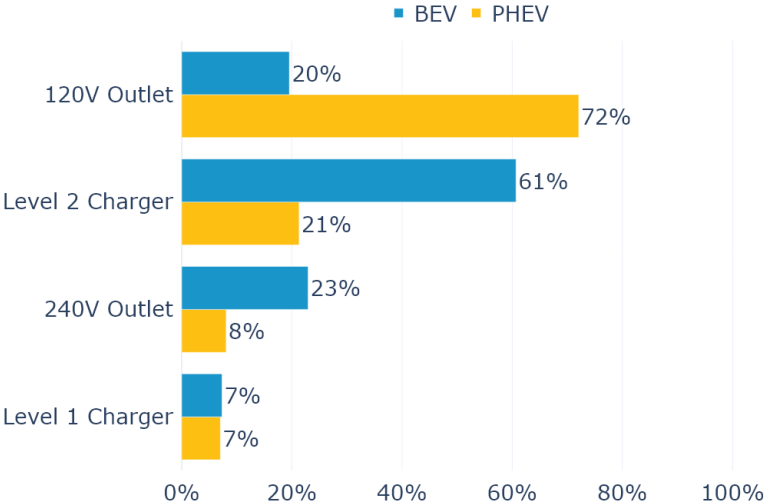
Responses from BEV and PHEV consumers are significantly different for workplace charging (chi-squared test: $\chi^2 = 67$, $p < 0.01$, $n = 3,951$) and near workplace charging (chi-squared test: $\chi^2 = 315$, $p < 0.01$, $n = 3,985$).



Respondents were also asked about whether they currently use or plan to use Level 1 or Level 2 charging at home. Figure 16 shows that PHEV respondents were significantly more likely to use a 120-volt wall outlet plug for charging their vehicle than BEV respondents, and BEV respondents were nearly two times as likely to use Level 2 charging compared to PHEV respondents.

Figure 16. Chargers Used By Technology Type Acquired

Responses are significantly different for 120v outlet (chi-squared test: $\chi^2 = 1234$, $p < 0.01$, $n = 4,663$), 240v outlet (chi-squared test: $\chi^2 = 158$, $p < 0.01$, $n = 4,663$), and level 2 charger (chi-squared test: $\chi^2 = 652$, $p < 0.01$, $n = 4,663$). There is no significant difference for the level 1 charger ($n = 4,663$).



2.6 Demographics

Figure 17 shows that a large majority (82%) of survey respondents are homeowners. About 77% of survey respondents live in detached houses (Figure 18), an increase relative to last year’s survey results at 72%.

Figure 17. Responses To “Do You Own Or Rent Your Residence?” By Technology Type Acquired

Responses from BEV and PHEV consumers are not significantly different (chi-squared test: $\chi^2 = 4$, $p < 0.16$, $n = 5,122$).

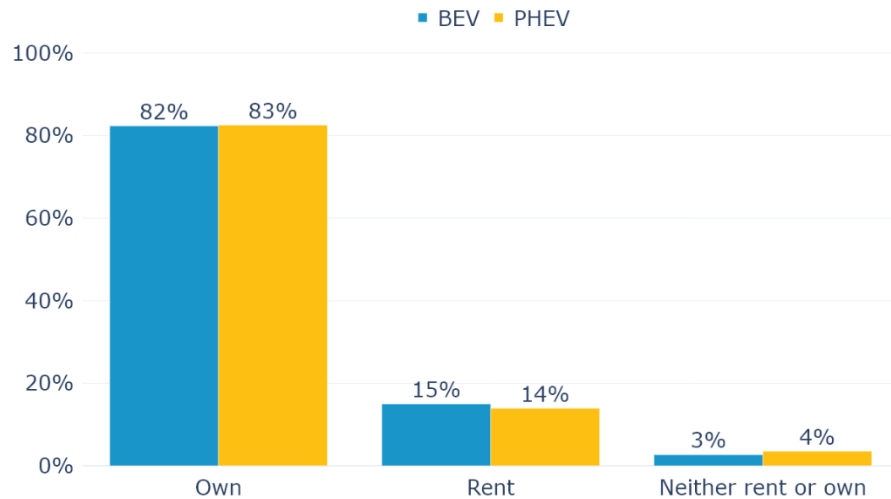
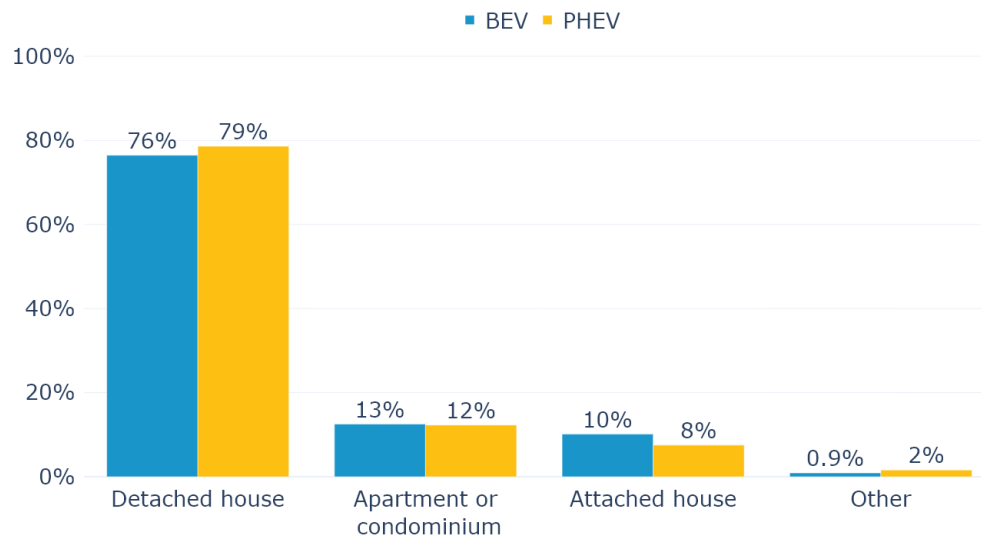


Figure 18. Residence Types By Technology Type Acquired

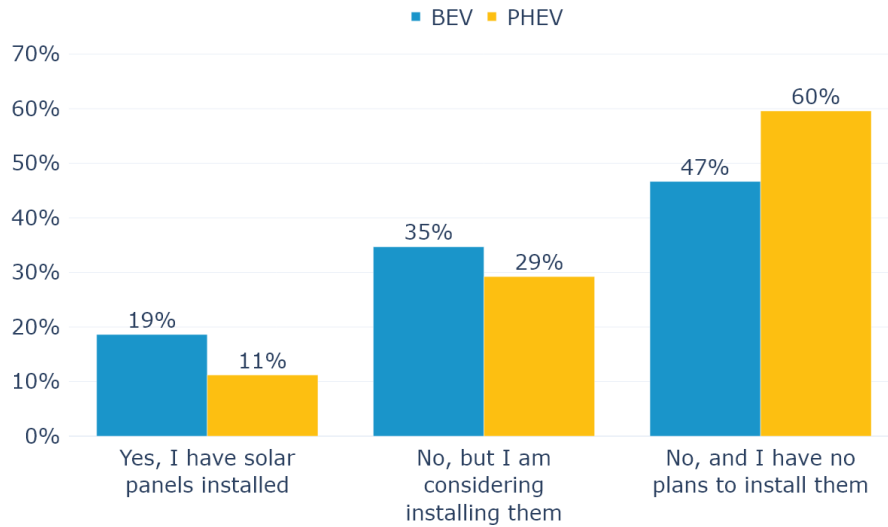
Responses from BEV and PHEV consumers are significantly different (chi-squared test: $\chi^2 = 14$, $p < 0.01$, $n = 5,155$).



Adoption of solar panels is at 16% overall, with BEV respondents slightly more likely than PHEV respondents to have solar panels installed at their residence (Figure 19).

Figure 19. Responses To “Do You Have Solar Panels At Your Residence?” By Technology Type Acquired

Responses from BEV and PHEV consumers are significantly different (chi-squared test: $\chi^2 = 92$, $p < 0.01$, $n = 5,279$).



Respondents are 69% male, with females making up a larger portion of PHEV respondents than BEV respondents (Figure 20). The education level of respondents is high, with 74% having a bachelor’s or graduate degree (Figure 21). Figure 22 and Figure 23 show that, on average, BEV respondents are younger and have slightly higher incomes than PHEV respondents (there is no statistically significant difference between the household income levels of BEV and PHEV respondents). Most survey respondents (73%) indicated they are White or Caucasian (Figure 24), and 10% of respondents indicated their ethnicity as Hispanic or Latino (not provided in a visual).

Figure 20. Gender By Technology Type Acquired

Responses from BEV and PHEV consumers are significantly different (chi-squared test: $\chi^2 = 168$, $p < 0.01$, $n = 5,133$).

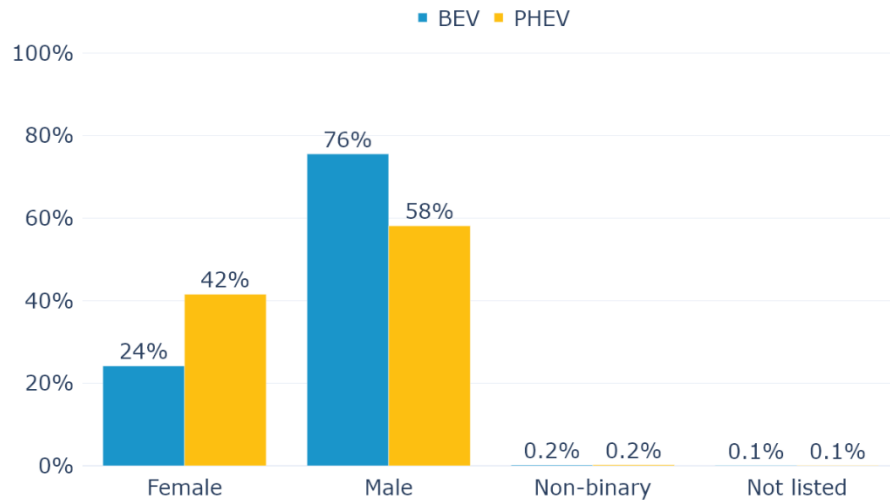


Figure 21. Highest Level of Education Completed By Technology Type Acquired

Responses from BEV and PHEV consumers are significantly different (chi-squared test: $\chi^2 = 15$, $p < 0.01$, $n = 5,115$).

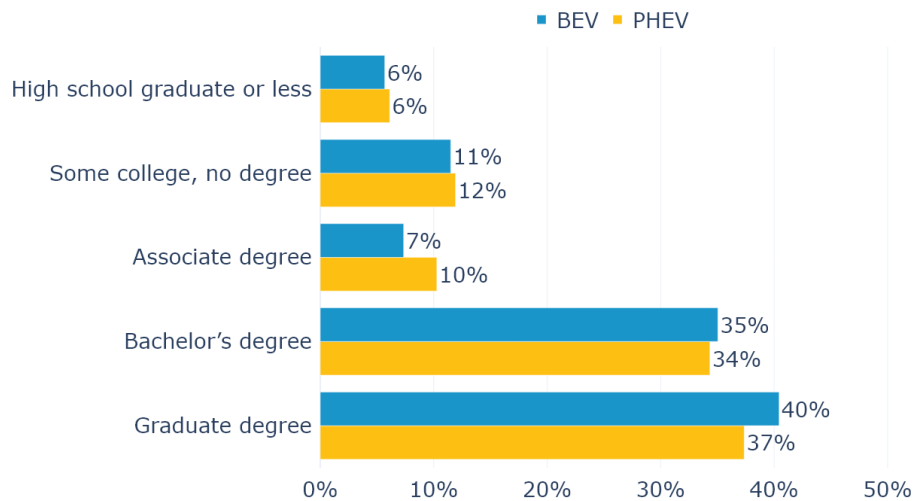


Figure 22. Age By Technology Type Acquired

Responses from BEV and PHEV consumers are significantly different (chi-squared test: $\chi^2 = 56$, $p < 0.01$, $n = 5,147$).

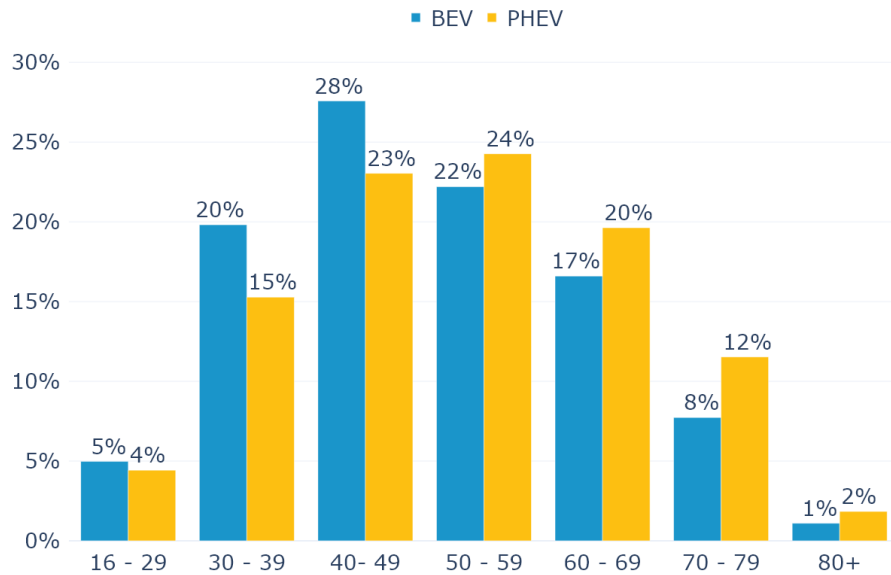


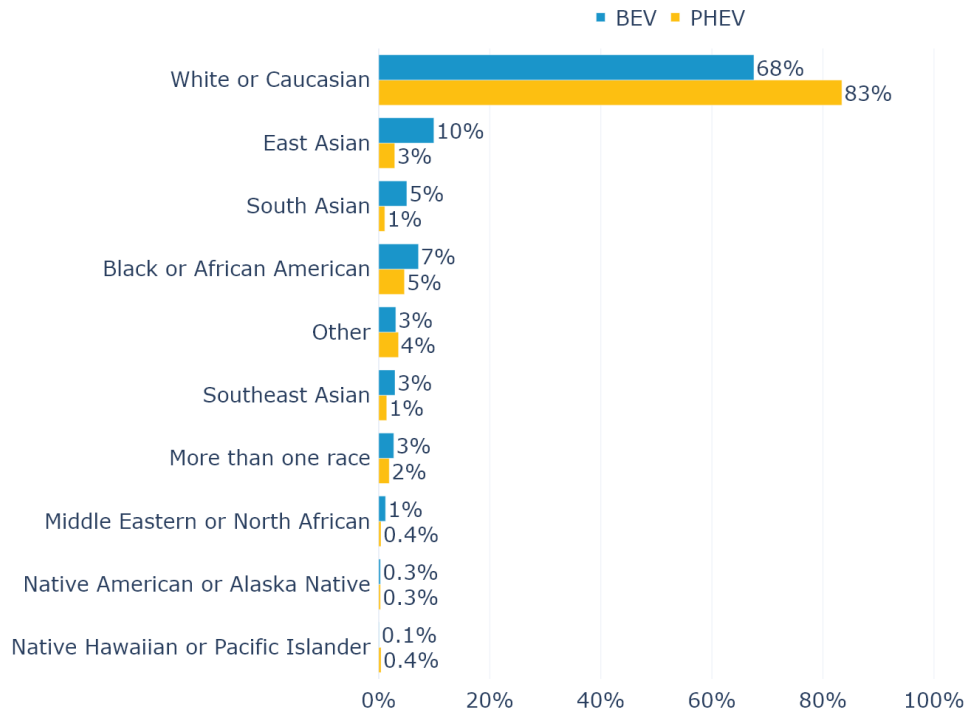
Figure 23. Current Annual Gross Household Income From All Sources (i.e. Before Taxes) By Technology Type Acquired

Responses from BEV and PHEV consumers are not significantly different (chi-squared test: $\chi^2 = 12$, $p < 0.13$, $n = 4,455$).



Figure 24. Racial Identity By Technology Type Acquired

Responses from BEV and PHEV consumers are significantly different (chi-squared test: $\chi^2 = 194$, $p < 0.01$, $n = 4,609$).



2.7 Disadvantaged Community Participation

Both economic and environmental burdens impact disadvantaged communities (DACs) and need to be prioritized to achieve environmental justice. On March 27, 2023, New York State finalized the criteria to define DACs.⁷ Based on these criteria, DACs have a higher proportion of minority residents and lower household incomes relative to New York State. In 2023, 36.7% of New York State residents live in a DAC.⁸ This percentage serve as an estimate for the DAC population for 2024.

Overall, 16% of Drive Clean Rebate program participants with vehicles purchased in 2024 were within DACs (Figure 25). DAC residents were proportionally represented among survey respondents, making up 16% of respondents.

Figure 25. Percentage Of Program Participants Within A Disadvantaged Community

(n = 41,717)



The vehicle types adopted between participants who reside within a DAC and outside a DAC were nearly identical between program participants and survey respondents. Amongst the program participants who reside within a DAC, about 65% adopted a BEV and 35% adopted a PHEV. This is the same proportion for program participants who reside outside of a DAC. Similar percentages were reflected with the survey respondents, where approximately 65% adopted a BEV and 35% adopted a PHEV both within and outside a DAC. Table 2 and Table 3 shows the percentage of program participants and survey respondents who acquired BEV and PHEV, respectively, by DAC status.

Table 2. Battery Electric Car Adoption By Disadvantaged Community Status

Percent of adoptees between program participants and survey respondents.

DAC Status	Program Participants acquiring a BEV	Survey Respondents acquiring a BEV
Inside a DAC	64.6%	64.9%
Outside a DAC	64.7%	64.5%

Table 3. Plug-in Hybrid Electric Car Adoption By Disadvantaged Community Status

Percent of adoptees between program participants and survey respondents.

DAC Status	Program Participants acquiring a PHEV	Survey Respondents acquiring a PHEV
Inside a DAC	35.4%	35.1%
Outside a DAC	35.3%	35.5%

Respondents within a DAC were slightly more likely to be rebate essential (Figure 26). The median income is lower for respondents within a DAC (Figure 27); 64% of survey respondents within a DAC had a household income of \$149,999 or less, compared to 46% of respondents outside a DAC.

Figure 26. Rebate Essentiality By Disadvantaged Community Status

Survey respondents are considered rebate essential if they responded “no” to the question “Would you have purchased/leased your electric car without the state car rebate (Drive Clean Rebate)?” Those that responded “yes” are not rebate essential. Responses from participants within a DAC and those outside of a DAC are significantly different (chi-squared test: $\chi^2 = 9$, $p < 0.01$, $n = 5,221$).

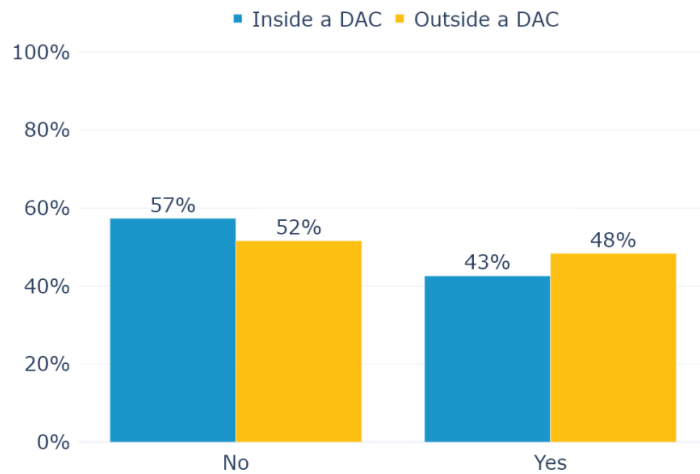
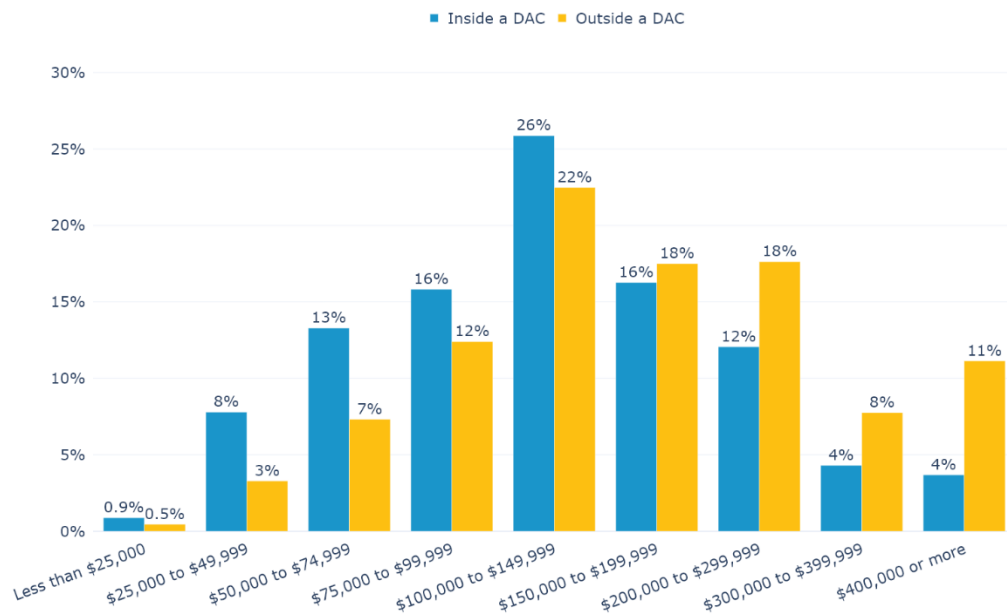


Figure 27. Income By Disadvantaged Community Status

Responses from participants within a DAC and those outside of a DAC are significantly different (chi-squared test: $\chi^2 = 123$, $p < 0.01$, $n = 4,404$).



Survey respondents residing within a DAC differed from those residing outside a DAC in housing type; respondents within a DAC were three times as likely to live in apartment buildings (Figure 28). Respondents within a DAC were two times as likely to report their rebated car as their first or only car (Figure 29).

Figure 28. Residence Type By Disadvantaged Community Status

Responses from participants within a DAC and those outside of a DAC are significantly different (chi-squared test: $\chi^2 = 313$, $p < 0.01$, $n = 5,095$).

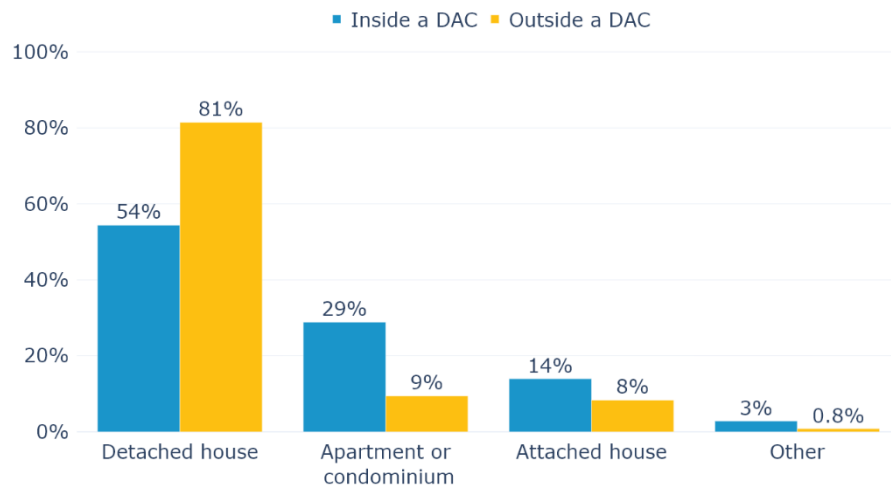
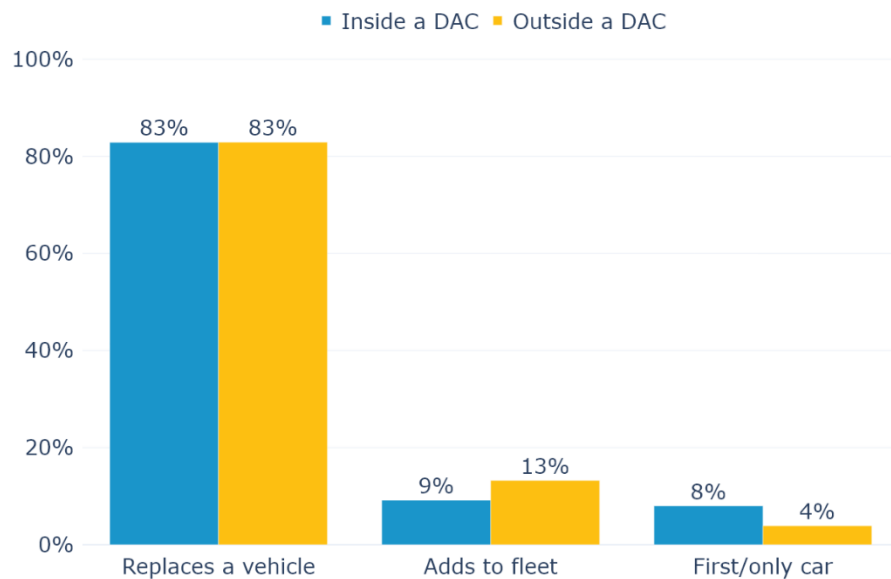


Figure 29. Vehicle Replacement Status By Disadvantaged Community Status

Responses from participants within a DAC and those outside of a DAC are significantly different (chi-squared test: $\chi^2 = 36$, $p < 0.01$, $n = 5,207$).



Survey respondents within a DAC had significantly different results from respondents outside a DAC in a few other dimensions, though the percentage differences were minimal: importance of the Drive Clean rebate in making it possible for respondent to acquire their electric car, first electric car acquired, most

important reason why respondent decided to acquire an electric car, and awareness of the rebate before visiting a dealership.

Respondents within a DAC were slightly more likely to find the Drive Clean rebate very or extremely important in making it possible for them to acquire their electric car (79% versus 73%, shown in Figure 30), and were likely to acquire their first electric car as part of participating in the program (83% versus 74%, shown in Figure 31).

Figure 30. Responses To “How Important Was The State Drive Clean Rebate In Making It Possible For You To Acquire Your Electric Car?” By Disadvantaged Community Status

Responses from participants within a DAC and those outside a DAC are significantly different (chi-squared test: $\chi^2 = 16$, $p < 0.01$, $n = 5,021$).

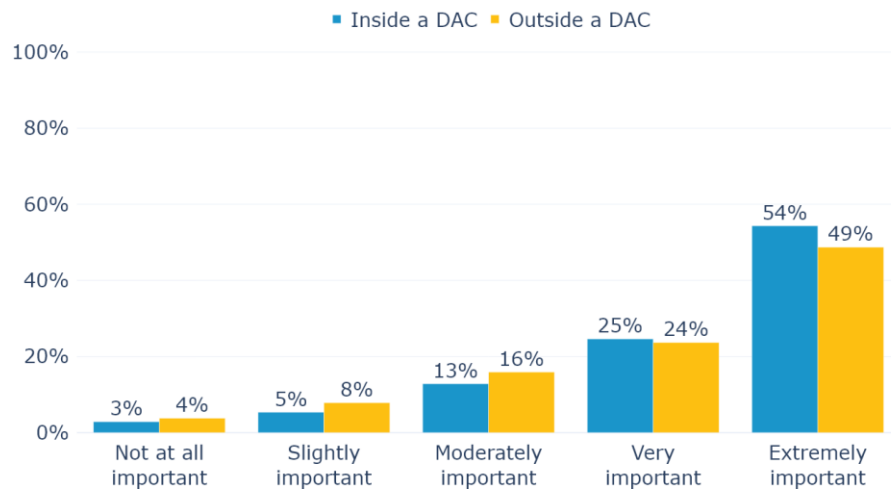


Figure 31. Responses To “Is This The First Electric Car You Have Ever Purchased Or Leased?” By Disadvantaged Community Status

Responses from participants within a DAC and those outside a DAC are significantly different (chi-squared test: $\chi^2 = 29$, $p < 0.01$, $n = 5,212$).

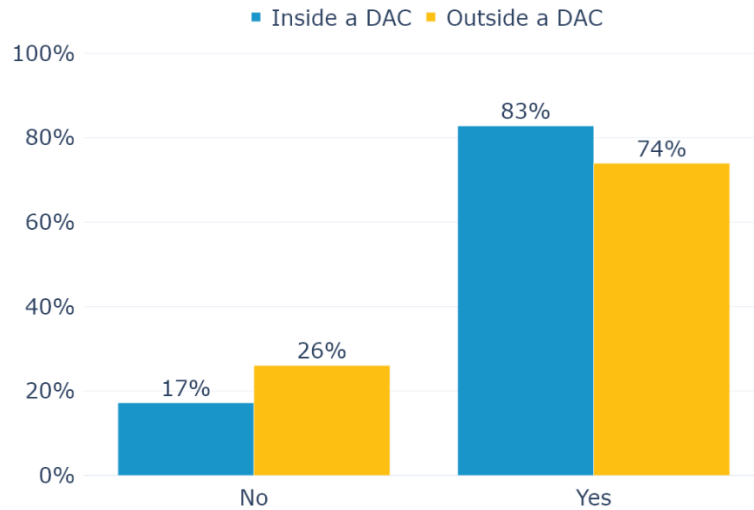


Figure 32 shows the distribution of responses to the question “Which of these factors was the most important reason why you decided to acquire an electric car?” by those within and outside a DAC. Respondents outside of a DAC selected saving money on fuel costs, saving money overall, and reducing environmental impacts nearly equally while respondents within a DAC selected saving money on fuel costs or saving money overall as their most important reason to acquire an electric car.

Close to half of the respondents within and outside a DAC were not aware of the Drive Clean rebate prior to visiting a dealership, with respondents within a DAC more likely to be not aware (Figure 33).

Figure 32. Most Important Reason Why Respondent Decided To Acquire An Electric Car By Disadvantaged Community Status

Responses from participants within a DAC and those outside a DAC are significantly different (chi-squared test: $\chi^2 = 36$, $p < 0.01$, $n = 5,210$).

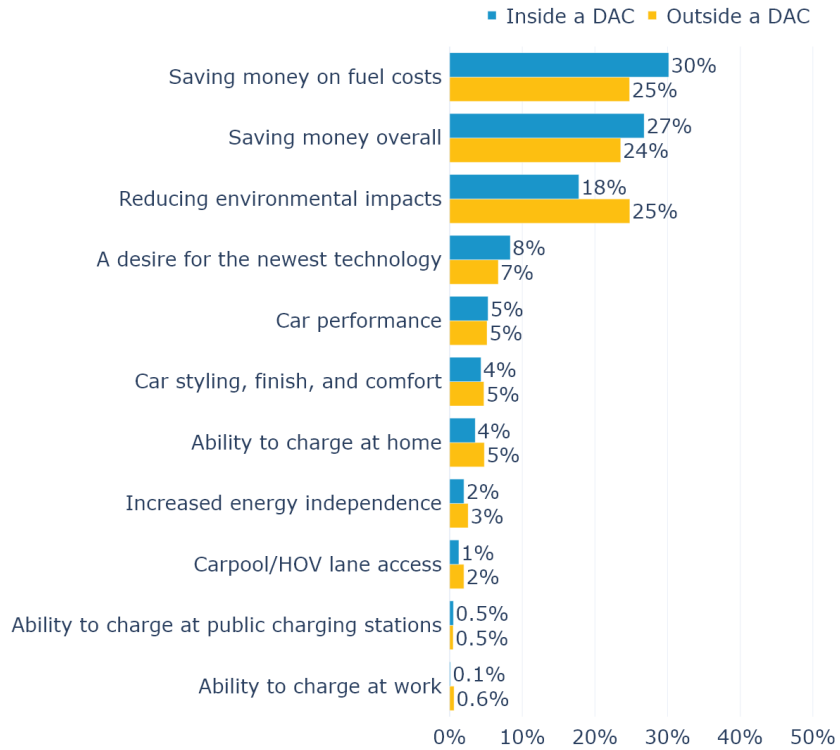
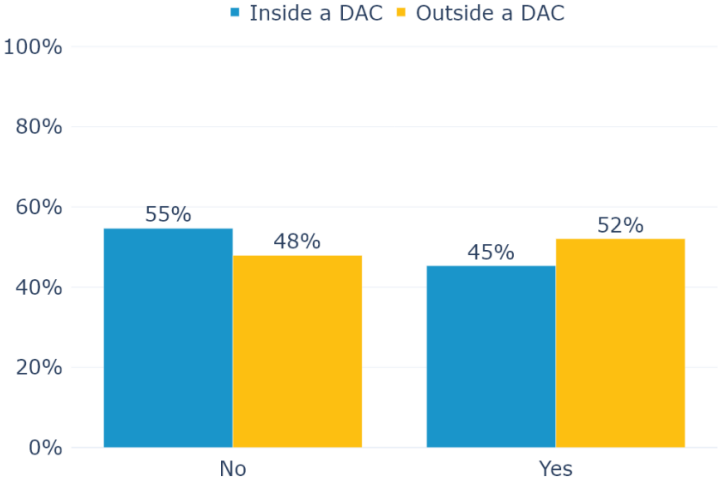


Figure 33. Responses To “Had You Heard About The Drive Clean Rebate Before You Visited A Dealership?” By Disadvantaged Community Status

Responses from participants within a DAC and those outside a DAC are significantly different (chi-squared test: $\chi^2 = 12$, $p < 0.01$, $n = 5,220$).



3 Discussion

The Adoption Survey results indicate that participants of the Drive Clean Rebate Program transition to using an electric car when replacing their household car. A majority (83%) responded that the rebated vehicle replaced or would replace another household car. This is a 6% increase from last year's survey results of 77%. Three-quarters (75%) of respondents reported that the rebated car is their first electric car or only car. While respondents are still much more likely to be receiving a rebate for their first electric car, this percentage is down from the 2023 survey which showed 81% of respondents acquiring their first electric car.

BEVs are the predominant vehicle choice, with 65% of participants adopting BEVs and 35% adopting PHEVs. The motivating factors for participants to acquire an electric car have stayed consistent overall throughout the survey years (2017-2024), however, the relative ranking of the motivations has shifted. Saving money overall remained the top motivation, while saving on fuel costs and reducing environmental impact tied for the second most common motivation.

The Drive Clean rebate remains an essential part of the electric car purchase or lease for participants with 73% of survey respondents rating the rebate to be extremely or very important in making it possible for them to acquire their car. Approximately 48% of respondents indicated that they would not have purchased or leased their electric car without the rebate. The average of rebate essentiality for respondents earning less than \$150,000 is higher by 8% than the average of those earning \$150,000 or more in the household.

The percentage of respondents that reported dealer awareness of the Drive Clean Rebate when they first visited the dealership was higher compared to last year's results (72% and 65%, respectively). However, the percentage of respondents that were aware of the rebate before visiting a dealership remains steady at 51% (compared to 53% and 54% from the 2023 and 2022 survey results, respectively).

DAC participation decreased slightly from the 2023 survey results from 19% to 16%. Rebate essentiality for DAC respondents increased from 47% in the last survey results to 57%.

The survey provided insight into respondent's electric car adoption experience and revealed similar trends about the participants—like household vehicle composition and motivating factors to acquire an electric car. As the electric car market matures, the experiences of electric car adopters will continue to evolve.

Appendix A. Adoption Survey Questionnaire

A.1 Introduction

Welcome to NYSERDA's Drive Clean Rebate “Electric Car Adoption Survey.”

Congratulations on your new electric car! Please take a few moments to complete the following survey to help our program best support the electric car market in New York State.

Your participation in the survey is voluntary. However, your input is valuable for enhancing the electric car experience for all New Yorkers, and it is important that you try to answer all of the questions. The information you provide will be kept private to the extent permitted by law. The analysis will only use summary level data; no individual respondents will be identified.

The survey will take about 10–15 minutes. Your link is personalized and cannot be shared with others. This means that your progress will be saved, so you can exit and return at a more convenient time to complete the survey.

If you have any questions about this research project or if you experience any technical difficulties, you may contact the Center for Sustainable Energy (CSE), the Drive Clean Rebate Program Administrator for NYSERDA, at:

Phone: (866) 595-7917

Email: NYDriveClean@energycenter.org

A.2 Personal Car

Page exit logic: Skip / Disqualify Logic **IF:** #1 Question "According to our records, you received a rebate for a [contact("nymake")] [contact("nymodel")]. Is this car used primarily for personal use?" is one of the following answers ("No, this car is primarily for commercial/organizational use") **THEN:** Jump to page 16 - Disqualification (commercial vehicle)

Page exit logic: Skip / Disqualify Logic **IF:** #1 Question "According to our records, you received a rebate for a [contact("nymake")] [contact("nymodel")]. Is this car used primarily for personal use?" is one of the following answers ("My rebate is for a different car") **THEN:** Jump to page 17 - Disqualification (different vehicle)

1) According to our records, you received a rebate for a [contact("nymake")] [contact("nymodel")]. Is this car used primarily for personal use?*

- Yes
 - No, this car is primarily for commercial/organizational use
 - My rebate is for a different car
-

A.3 Primary Driver

Page exit logic: Skip / Disqualify Logic **IF:** #2 Question "Are you the primary driver of this [contact("nymake")] [contact("nymodel")]?" is one of the following answers ("No") **THEN:** Jump to page 18 - Disqualification (primary driver)

2) Are you the primary driver of this [contact("nymake")] [contact("nymodel")]?*

- Yes
 - No
-

A.4 Electric Car Definition

In this survey, we are going to ask you about your experience with your **electric car**. By car, we mean passenger cars, SUVs, or light duty trucks. Your car might:

- run entirely on electricity from plugging the car in (all-battery electric car)
- use a combination of electricity from plugging in and gasoline (plug-in hybrid electric car)
- use hydrogen as fuel (hydrogen fuel-cell electric car)

When we refer to **electric cars**, we are referring to all of these.

A.5 Electric Car Purchasing Decisions

Logic: Show/hide trigger exists.

3) Which of the following best describes your new electric car purchase or lease?

- It replaces (or will replace) another household car
- It adds to the other cars in my household's fleet
- It is my household's first-ever car
- My household has had cars in the past, but did not have one when we purchased/leased this electric car

Logic: Hidden unless: #3 Question "Which of the following best describes your new electric car purchase or lease?" is one of the following answers ("It replaces (or will replace) another household car")

Please describe the **make and model** of the car that you replaced (or plan to replace) with your new electric car.

Make:

- Acura
- Audi
- BMW
- Buick
- Cadillac
- Chevrolet
- Chrysler
- Dodge
- FIAT
- Ford
- GMC
- Honda
- Hyundai
- Infiniti
- Jaguar
- Jeep
- Kia
- Land Rover / Range Rover
- Lexus
- Lincoln
- Mazda
- Mercedes-Benz
- Mercury

- MINI
- Mitsubishi
- Nissan
- Oldsmobile
- Pontiac
- Porsche
- Saab
- Saturn
- Scion
- smart
- Subaru
- Suzuki
- Tesla
- Toyota
- Volkswagen
- Volvo
- Other: _____ *

Model: _____

Please describe the **model year and technology type** of the car that you replaced (or plan to replace) with your new electric car.

Model Year:

- 2022
- 2021
- 2020
- 2019
- 2018
- 2017
- 2016
- 2015
- 2014
- 2013
- 2012
- 2011
- 2010
- 2009
- 2008
- 2007
- 2006
- 2005

- 2004
- 2003
- 2002
- 2001
- 2000
- 1999 or earlier

Technology Type:

- Gasoline
 - Conventional hybrid (fueled with gasoline only)
 - Plug-in hybrid electric car (recharged with electricity and/or fueled with gasoline)
 - All-battery electric car (recharged with electricity only)
 - Hydrogen fuel-cell electric car
 - Diesel
 - Compressed natural gas
 - Flex-fuel (E85 ethanol)
 - Other alternative fuel
-

A.6 Electric Car Purchasing Decisions (cont.)

Logic: Show/hide trigger exists.

5) Including your new electric car, how many cars does your household own or lease in total? [please exclude motorcycles, ATVs, RVs, etc. or any cars not currently registered]

- 1
- 2
- 3
- 4 or more

Logic: Hidden unless: #5 Question "Including your new electric car, how many cars does your household own or lease in total? [please exclude motorcycles, ATVs, RVs, etc. or any cars not currently registered]" is one of the following answers ("2","3","4 or more")

6) Other than your rebated electric car, please describe the car in your household that you will use most often.

Car Type:

Compact Car



Midsize Car



Fullsize Car



Small/midsize SUV



Fullsize SUV



Pickup truck



Minivan



Technology Type:

Gasoline

Conventional hybrid (fueled with gasoline only)

Plug-in hybrid electric car (recharged with electricity and/or fueled with gasoline)

All-battery electric car (recharged with electricity only)

Hydrogen fuel-cell electric car

Diesel

Compressed natural gas

Flex-fuel (E85 ethanol)

Other alternative fuel

7) Which of the following statements best describes your interest in acquiring an electric car when you started your search for a new car? Please select one statement.

- I did not know electric cars existed
- I knew electric cars existed, but had no interest in one
- I had some interest in an electric car
- I was very interested in an electric car
- I was only interested in an electric car but considered multiple makes/models
- I was only interested in the specific electric car I purchased/leased

8) Is this the first electric car you have ever purchased or leased?

- Yes
- No

A.7 Electric Car Purchasing Decisions

9) On a scale of 1 to 5 (with 1 representing "Not at all important" and 5 representing "Extremely important"), please describe how important each of the following factors was in your decision to acquire an electric car.

Factors	Not at all important (1)	Slightly important (2)	Moderately important (3)	Very important (4)	Extremely important (5)
Saving money on fuel costs	()	()	()	()	()
Saving money overall	()	()	()	()	()
Reducing environmental impacts	()	()	()	()	()
Carpool or High Occupancy Vehicle (HOV) lane access	()	()	()	()	()
Increased energy independence	()	()	()	()	()
Ability to charge at home	()	()	()	()	()
Ability to charge at work	()	()	()	()	()
Ability to charge at public charging stations	()	()	()	()	()
Speed of car refueling	()	()	()	()	()
Car performance	()	()	()	()	()
Car styling, finish, and comfort	()	()	()	()	()
A desire for the newest technology	()	()	()	()	()

Logic: Hidden unless: nyfueltype is exactly equal to "Electric"

10) Which of these factors was the **most important** reason why you decided to acquire an electric car? Please select one statement.

- Saving money on fuel costs
- Saving money overall
- Reducing environmental impacts
- Carpool or High Occupancy Vehicle (HOV) lane access
- Increased energy independence
- Ability to charge at home
- Ability to charge at work
- Ability to charge at public charging stations
- Car performance
- Car styling, finish, and comfort
- A desire for the newest technology

Logic: Hidden unless: nyfueltype is exactly equal to "Hydrogen"

11) Which of these factors was the **most important** reason why you decided to acquire an electric car? Please select one statement.

- Saving money on fuel costs
- Saving money overall
- Reducing environmental impacts
- Carpool or High Occupancy Vehicle (HOV) lane access
- Increased energy independence
- Speed of car refueling
- Car performance
- Car styling, finish, and comfort
- A desire for the newest technology

12) On a scale of 1 to 5 (with 1 representing "Not at all important" and 5 representing "Extremely important"), please describe how important each of the following factors was in making it possible for you to acquire your electric car.

Factors	Not at all important (1)	Slightly important (2)	Moderately important (3)	Very important (4)	Extremely important (5)	Not applicable
State car rebate (Drive Clean Rebate)	()	()	()	()	()	()
Federal tax incentives	()	()	()	()	()	()
Green Pass or similar toll/E-Z Pass discount	()	()	()	()	()	()
Manufacturer or dealer incentives (e.g., low interest rate, cash back)	()	()	()	()	()	()
Special electricity rates for charging at home	()	()	()	()	()	()
Free charging away from home	()	()	()	()	()	()
Free hydrogen fueling	()	()	()	()	()	()

A.7 Program Performance

13) Would you have purchased/leased your electric car without the State car rebate (Drive Clean Rebate)?

- Yes
- No

Logic: Show/hide trigger exists.

14) If the Drive Clean Rebate were not available for electric cars, would you still have purchased/leased the same car? Please select one statement.

- Yes, I would have purchased/leased this exact electric car anyway
- Yes, but I would have purchased/leased a less expensive version of the same model
- No

Logic: Hidden unless: #14 Question "If the Drive Clean Rebate were not available for electric cars, would you still have purchased/leased the same car? Please select one statement." is one of the following answers ("No")

15) If the Drive Clean Rebate were not available for electric cars, what would you most likely have done?

Please select one statement.

- Purchased/leased a different new electric car
- Purchased/leased a used electric car
- Purchased/leased a new non-electric car instead
- Purchased/leased a used non-electric car instead
- Not made any purchase/lease at all

16) Had you heard about the Drive Clean Rebate **before** you visited a dealership?

- Yes
 - No
-

A.8 Program Performance (cont.)

17) On a scale of 1 to 5 (with 1 representing "Not at all satisfied" and 5 representing "Extremely satisfied"), please describe how satisfied you were with each of the following aspects of the Drive Clean Rebate.

Aspects of Drive Clean Rebate	Not at all satisfied (1)	Slightly satisfied (2)	Moderately satisfied (3)	Very satisfied (4)	Extremely satisfied (5)	Not applicable
Promotion	()	()	()	()	()	()
Website	()	()	()	()	()	()
Dealer familiarity with the rebate	()	()	()	()	()	()
Amount of the rebate	()	()	()	()	()	()

A.9 Dealership Experience

The following questions will ask about your experience with your electric car dealer. If you visited more than one dealer, please answer the following questions for the dealership where you acquired your electric car.

18) How many electric cars did you see on your dealer's lot? [please provide your best estimate]

- None; electric cars had to be ordered

- 1–2
- 3–5
- 6–10
- 11–20
- More than 20

19) Did your dealer know about the Drive Clean Rebate when you first went to visit them?

- Yes
- No
- I don't know

20) On a scale of 1 to 5 (with 1 representing "Not at all knowledgeable " and 5 representing "Extremely knowledgeable"), please describe how knowledgeable your dealer was about the following topics.

Topics	Not at all knowledgeable (1)	Slightly knowledgeable (2)	Moderately knowledgeable (3)	Very knowledgeable (4)	Extremely knowledgeable (5)	I don't recall	Did not discuss
Electric cars in general	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Total cost of ownership	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Government financial incentives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other incentives/perks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Car performance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Environmental benefits of electric cars	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Electricity rates to charge at home	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Home charging (outlet/equipment options, installation costs, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Away-from-home charging (workplace, public)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Current availability of hydrogen fueling stations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Future plans for hydrogen fueling stations in New York	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hydrogen safety	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hydrogen refueling process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Smartphone apps for your EV	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

21) Whether or not these were offered to you, which of the following services would be valuable for a dealer to provide? [select all that apply]

- The option to have an extended test drive or loaner electric car before buying/leasing
 - An electric car specialist to answer questions about cars
 - Facilitating the installation of a home charging station
 - Electric car tutorials or workshops for new owners
 - Free charging at dealership
 - Free hydrogen fueling at dealership
 - Other, please specify:: _____ *
 - None of the above
-

A.11 Charging

Page entry logic: This page will show when: nyfueltype is exactly equal to "Electric"

Logic: Show/hide trigger exists.

22) Do you charge your electric car at home?

- Yes
- No, but I am planning to start charging at home
- No, and I have no plans to start charging at home

Logic: Hidden unless: #22 Question "Do you charge your electric car at home?" is one of the following answers ("Yes", "No, but I am planning to start charging at home")

23) Which charging method(s) are you currently using (or plan to use) when charging at home? [select all that apply]

- Plugging directly into a 120V outlet (typical household outlet)
- Plugging directly into a 240V outlet (e.g., dryer outlet)
- Using a level 1 (120V) charging station with a built-in plug
- Using a level 2 (240V) charging station with a built-in plug

24) Do you have access to charging at the following locations?

Charging Locations	Yes, and I can charge for free	Yes, but I must pay to charge	No	I don't know	Not applicable
Near your home	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
At your workplace	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Near your workplace	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

A.12 Hydrogen Fueling

Page entry logic: This page will show when: nyfueltype is exactly equal to "Hydrogen"

25) Do you have access to fueling at the following locations?

Fueling Locations	Yes, and I can refuel for free	Yes, but I must pay to refuel	No	I don't know	Not applicable
Near your home	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Near your workplace	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
On the way to/from your workplace	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

A.13 Household and Demographic Characteristics

In this final section, we will be asking some questions about you and your household so we can learn more about the characteristics of electric car adopters in New York State. The information you provide will be **kept private** to the extent permitted by law. The analysis will only use summary level data; no individual respondents will be identified.

26) Do you own or rent your residence?*

- Own
- Rent
- Neither rent nor own
- Prefer not to answer

27) What type of residence do you live in?*

- Detached house (single family home)
- Attached house (e.g., townhome, duplex, triplex)
- Apartment/condominium
- Other, please specify: _____ *
- Prefer not to answer

28) Do you have solar panels at your residence?

- Yes, I have solar panels installed
- No, but I am considering installing them
- No, and I have no plans to install them

29) How many people live in your household, including yourself?

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9 or more

30) How many licensed drivers live in your household, including yourself?

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9 or more

31) What is your age?*

- 16–20
- 21–29
- 30–39
- 40–49
- 50–59
- 60–69
- 70–79
- 80+
- Prefer not to answer

32) What is your gender?*

- Female
- Male
- Non-binary/third gender
- Prefer to self-describe:: _____
- Prefer not to answer

33) What is the highest level of education you have completed?*

- High school graduate or less
- Some college, no degree
- Associate degree
- Bachelor's degree
- Graduate degree
- Prefer not to answer

34) What is your current annual gross household income from all sources (i.e., before taxes)?*

- Less than \$25,000
- \$25,000 to \$49,999
- \$50,000 to \$74,999
- \$75,000 to \$99,999
- \$100,000 to \$149,999
- \$150,000 to \$199,999
- \$200,000 to \$299,999
- \$300,000 to \$399,999
- \$400,000 or more
- Prefer not to answer

35) Are you Hispanic or Latino/a?*

- Yes
- No
- Prefer not to answer

36) How do you prefer to describe your racial/ethnic identity? [select all that apply]*

- Black or African American
 - East Asian
 - Middle Eastern or North African
 - Native American or Alaska Native
 - Native Hawaiian or Pacific Islander
 - South Asian
 - Southeast Asian
 - White or Caucasian
 - Other, please specify: _____ *
 - Prefer not to answer
-

A.14 Other Comments

Please be sure to click “Submit” at the bottom of the page to complete the survey.

37) What has been the best part of your experience purchasing or leasing an electric car?

38) Please share any feedback about how the Drive Clean Rebate could be improved in the box below.

39) Please share any additional comments about your electric car experience or this survey in the box below.

A.15 Disqualification (Commercial Vehicle)

Unfortunately, you do not qualify for this survey at this time. You indicated that the car associated with your survey invitation is not being used primarily as a private car.

However, we welcome you to provide any feedback you have about the Drive Clean Rebate in the comment box below.

If you have any questions, please email NYDriveClean@energycenter.org. We thank you for your time and appreciate your interest.

40) Please share any comments in the box below.

A.16 Disqualification (Different Vehicle)

Page entry logic: This page will show when: #1 Question "According to our records, you received a rebate for a [contact("nymake")] [contact("nymodel")]. Is this car used primarily for personal use?" is one of the following answers ("My rebate is for a different car")

Unfortunately, you do not qualify for this survey at this time. You indicated that the car associated with your survey invitation is a different car than the one for which you are receiving this rebate.

However, we welcome you to provide any feedback you have about the Drive Clean Rebate in the comment box below.

If you wish to take the survey for another private car receiving a rebate, please look for the survey invitation associated with that car, or email NYDriveClean@energycenter.org with any questions.

41) Please share any comments in the box below.

A.17 Disqualification (Primary Driver)

Page entry logic: This page will show when: #2 Question "Are you the primary driver of this [contact("nymake")] [contact("nymodel")]?" is one of the following answers ("No")

Unfortunately, you do not qualify for this survey at this time. You indicated that you are not the primary driver of the rebated car.

However, we welcome you to provide any feedback you have about the Drive Clean Rebate in the comment box below.

If you have any questions, please email NYDriveClean@energycenter.org. We thank you for your time and appreciate your interest.

42) Please share any comments in the box below.

A.18 Thank You!

Thank you for your participation in this survey. Your feedback is greatly appreciated and will help inform and support the development of electric car markets in New York State. If you have any questions about this research project, you may contact the Center for Sustainable Energy (CSE), the Drive Clean Rebate Program Administrator for NYSERDA, at:

Phone: (866) 595-7917

Email: NYDriveClean@energycenter.org

Endnotes

- ¹ Excludes businesses and government entities.
- ² One hundred and thirty-eight (138) responses were disqualified out of the 5,430 complete responses received, resulting in 5,292 remaining responses that were analyzed in this report. Respondents were disqualified for one of three reasons: their rebate was for a different car, their car was primarily for commercial use, or they were not the car's primary driver.
- ³ Excludes businesses and government entities.
- ⁴ Rebates processed are confirmed to match the vehicle acquired, thus respondents who selected this option are removed from analysis to preserve the validity of responses.
- ⁵ Raking, also known as iterative proportional fitting, is a technique used to match distributions from a sample to the known distributions of the broader population.
- ⁶ Fuel type abbreviations are: Conventional Hybrid Electric Vehicle (CHEV), Fuel-Cell Electric Vehicle (FCEV)
- ⁷ The finalized criteria identified for a disadvantaged community as defined by New York State.
- ⁸ The percentage of New York State population in a DAC was provided by NYSERDA and is based off of the Census American Community Survey population estimates for 2019-2023.