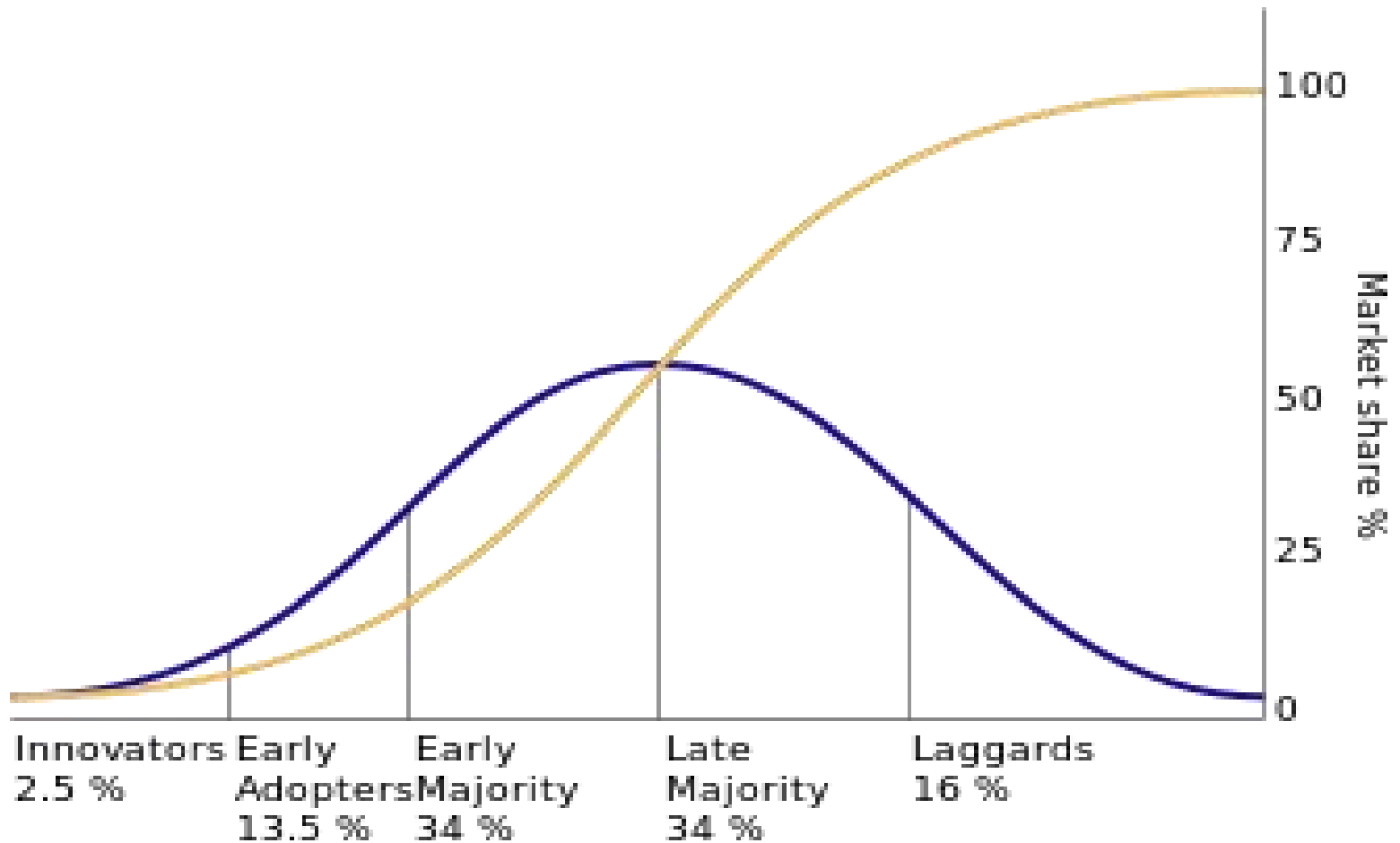


Will They or Won't They?

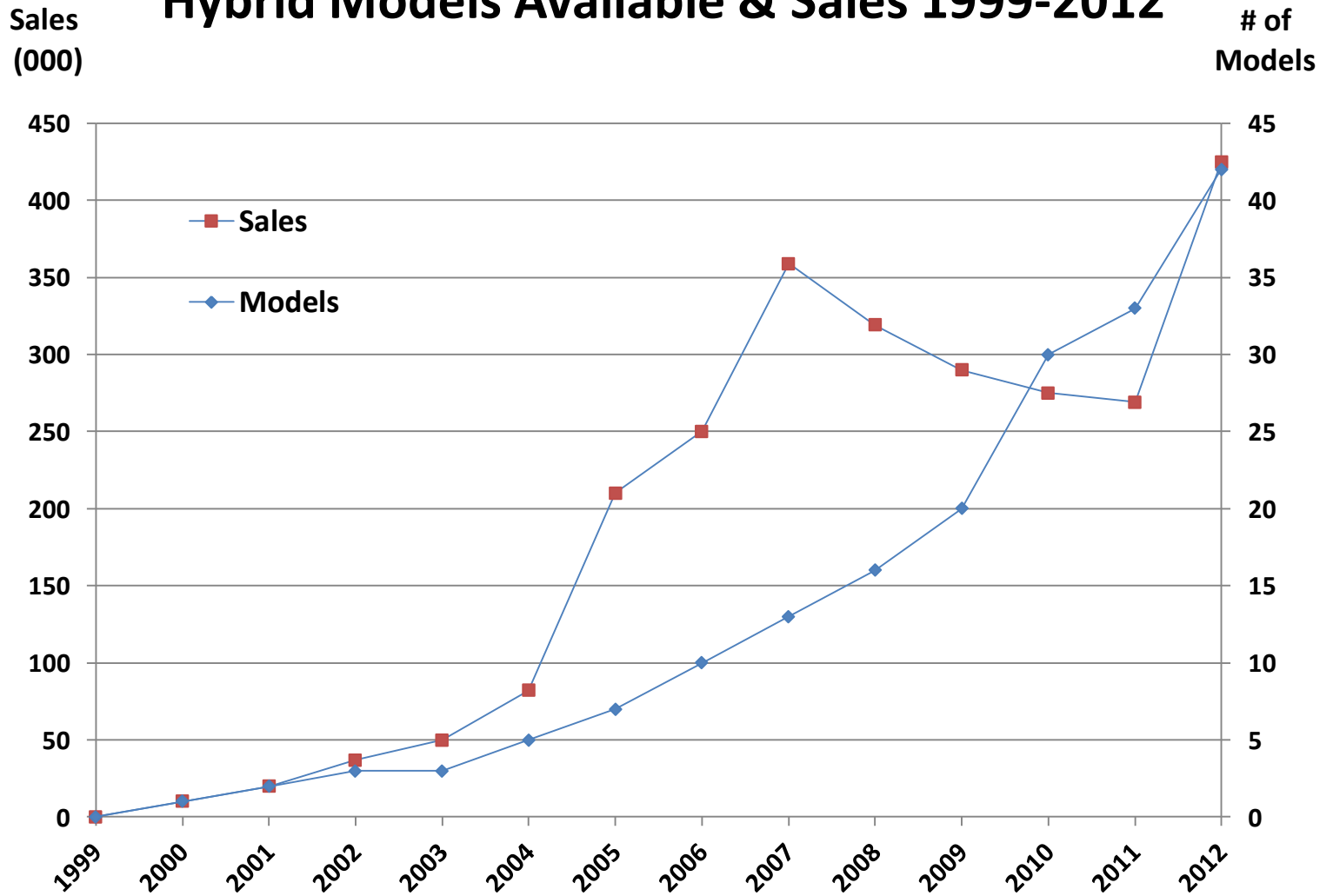
**Consumer Adoption of High Fuel Economy Vehicles, 1999-2012,
and the Role of the 2025 Standards in Speeding
Diffusion of Advanced Technology**

**Panel on *Consumer Acceptance of Advanced Technology Vehicles*
Mobile Sources Technical Review Subcommittee
December 13, 2012**

The Classic Innovation Diffusion Framework

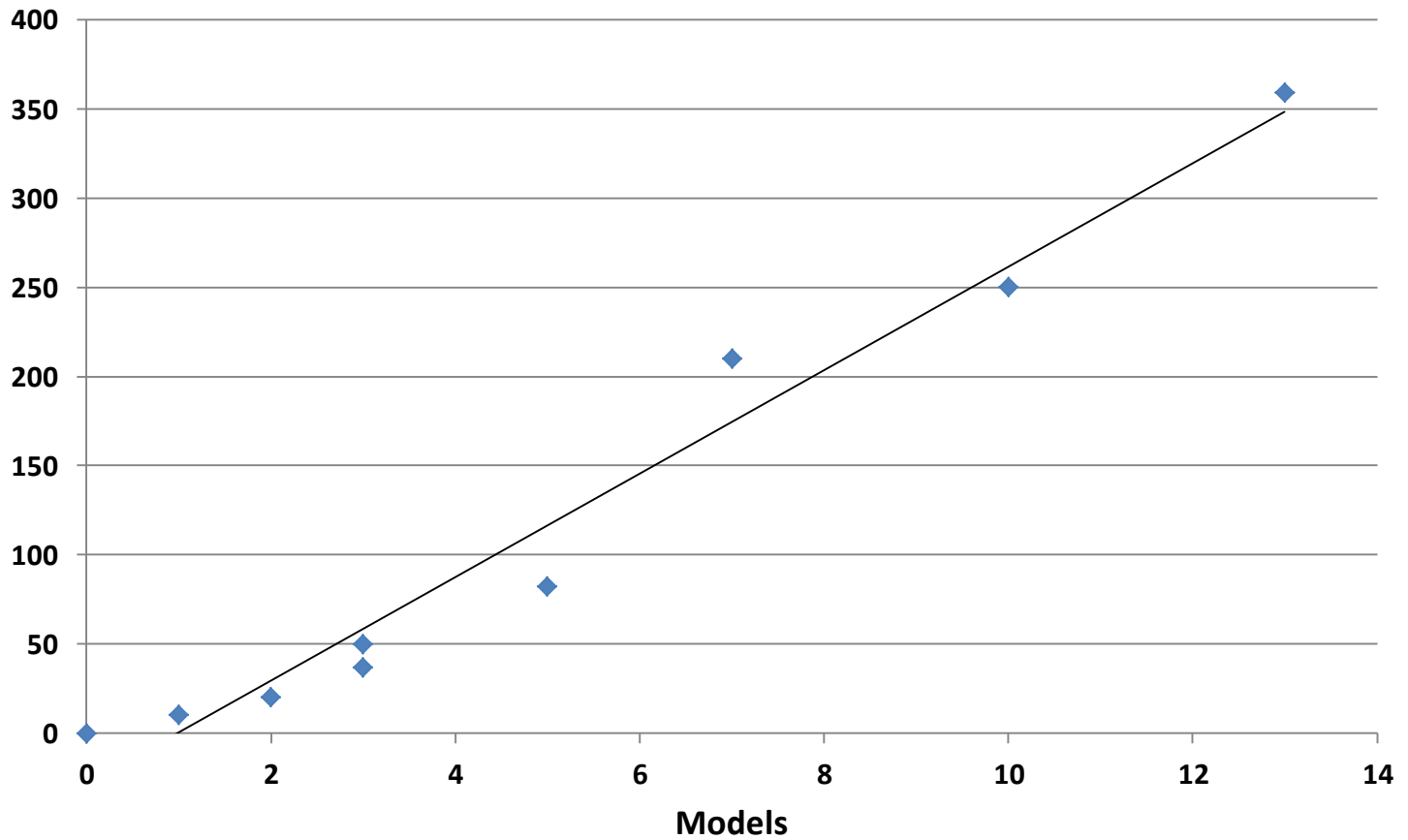


Hybrid Models Available & Sales 1999-2012

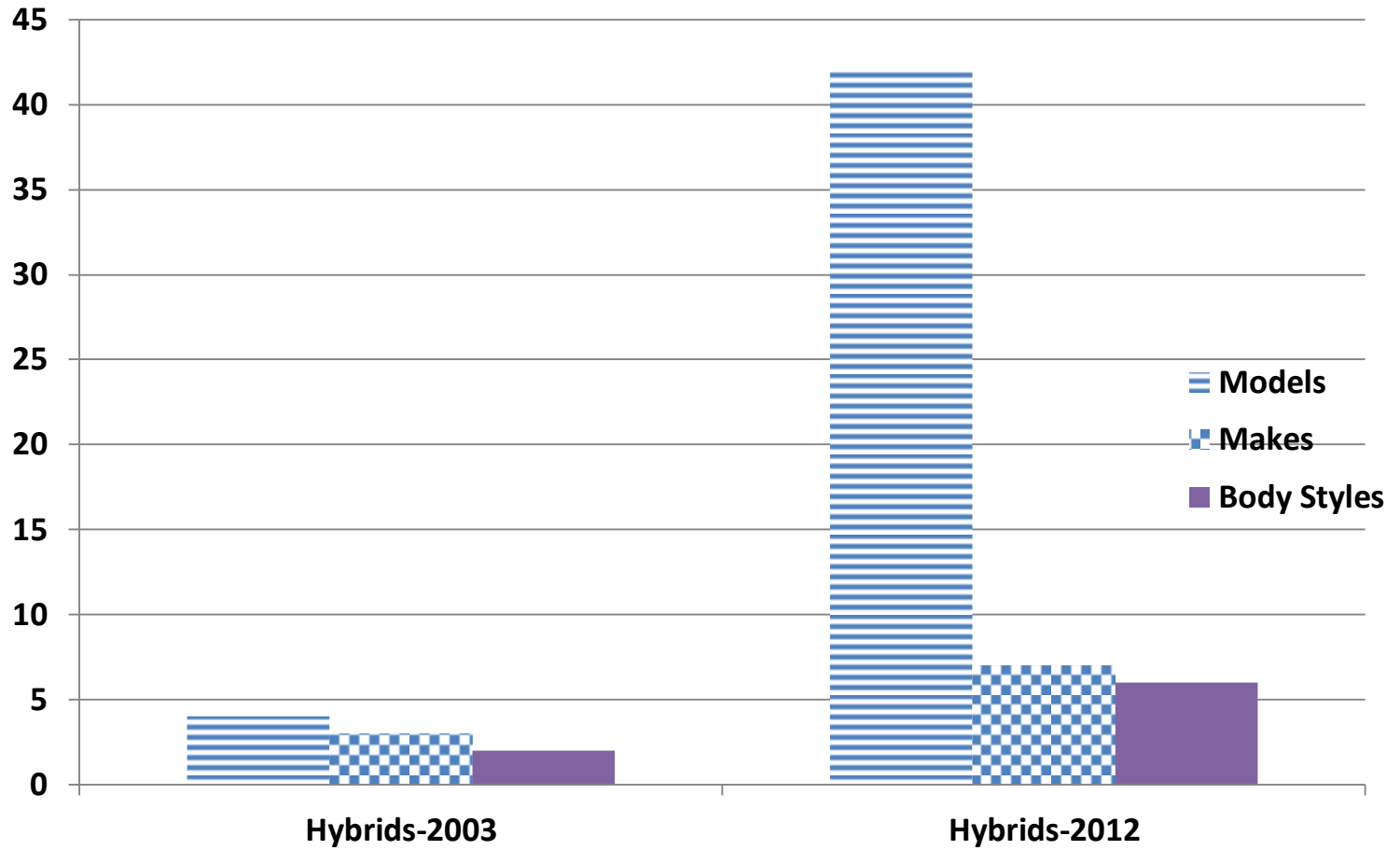


Hybrid Models & Sales, Excluding Recession

Sales (000)

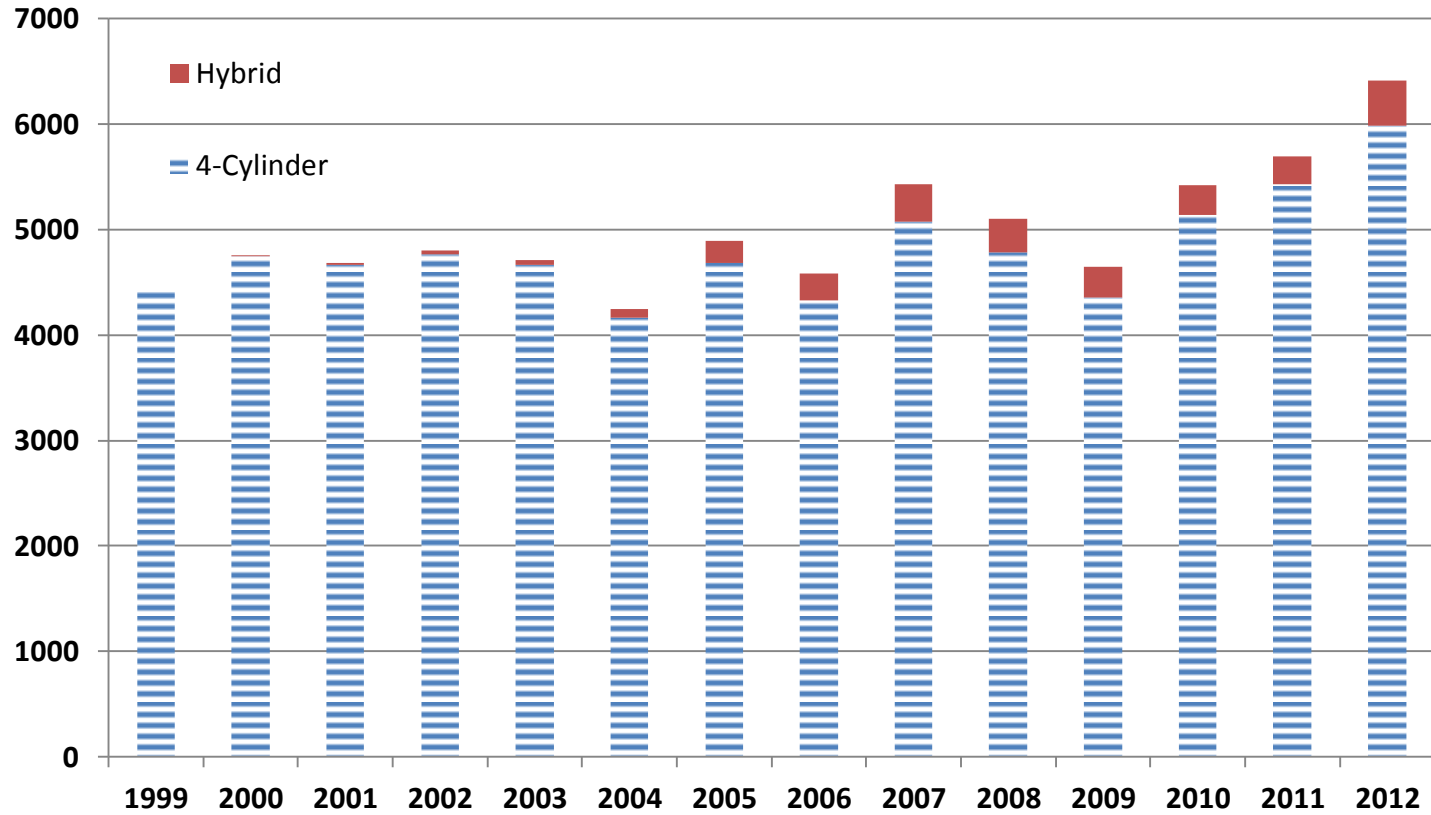


Availability of Hybrid Choice



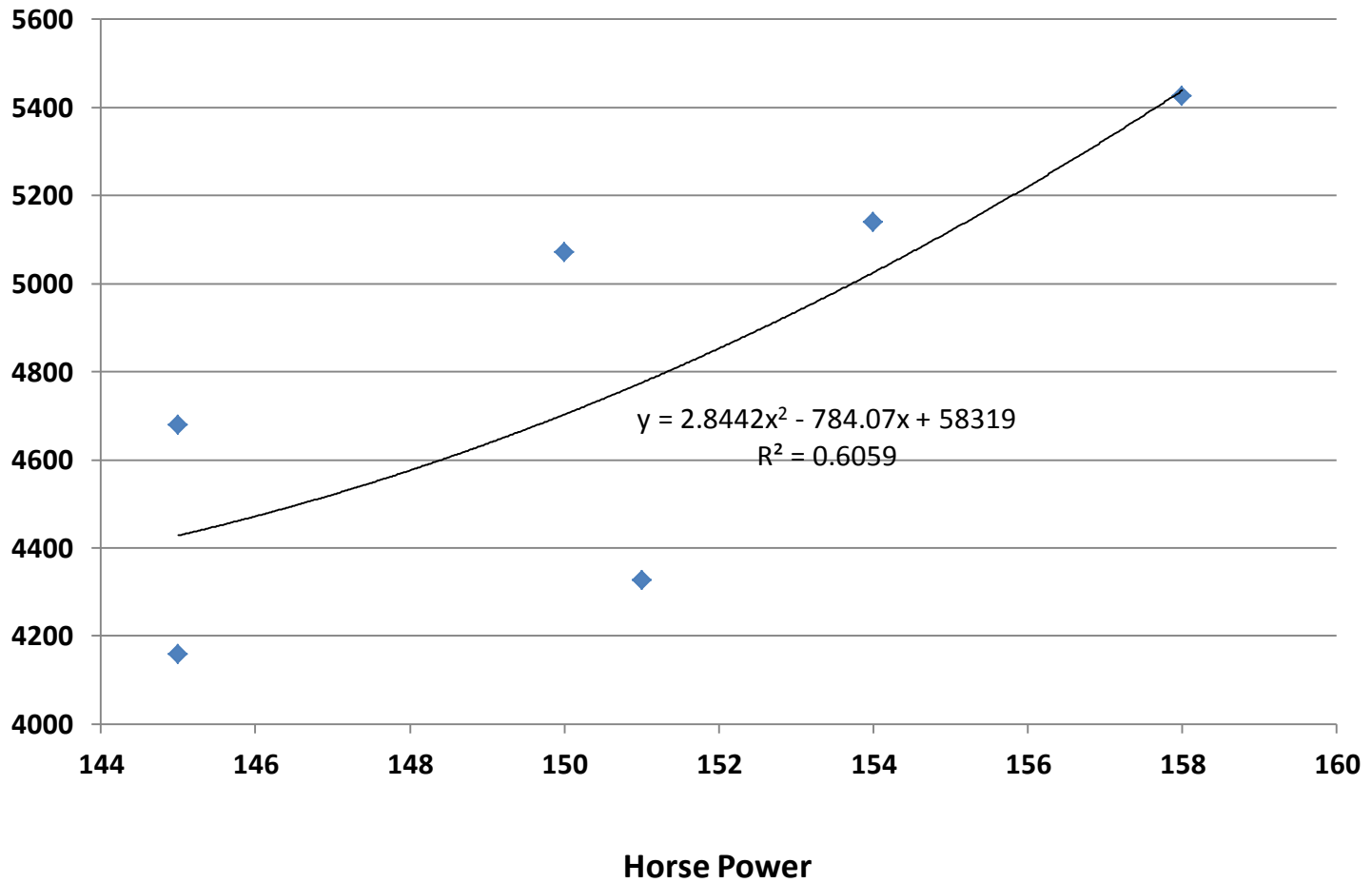
4-Cylinder and Hybrid Sales

Units (000)

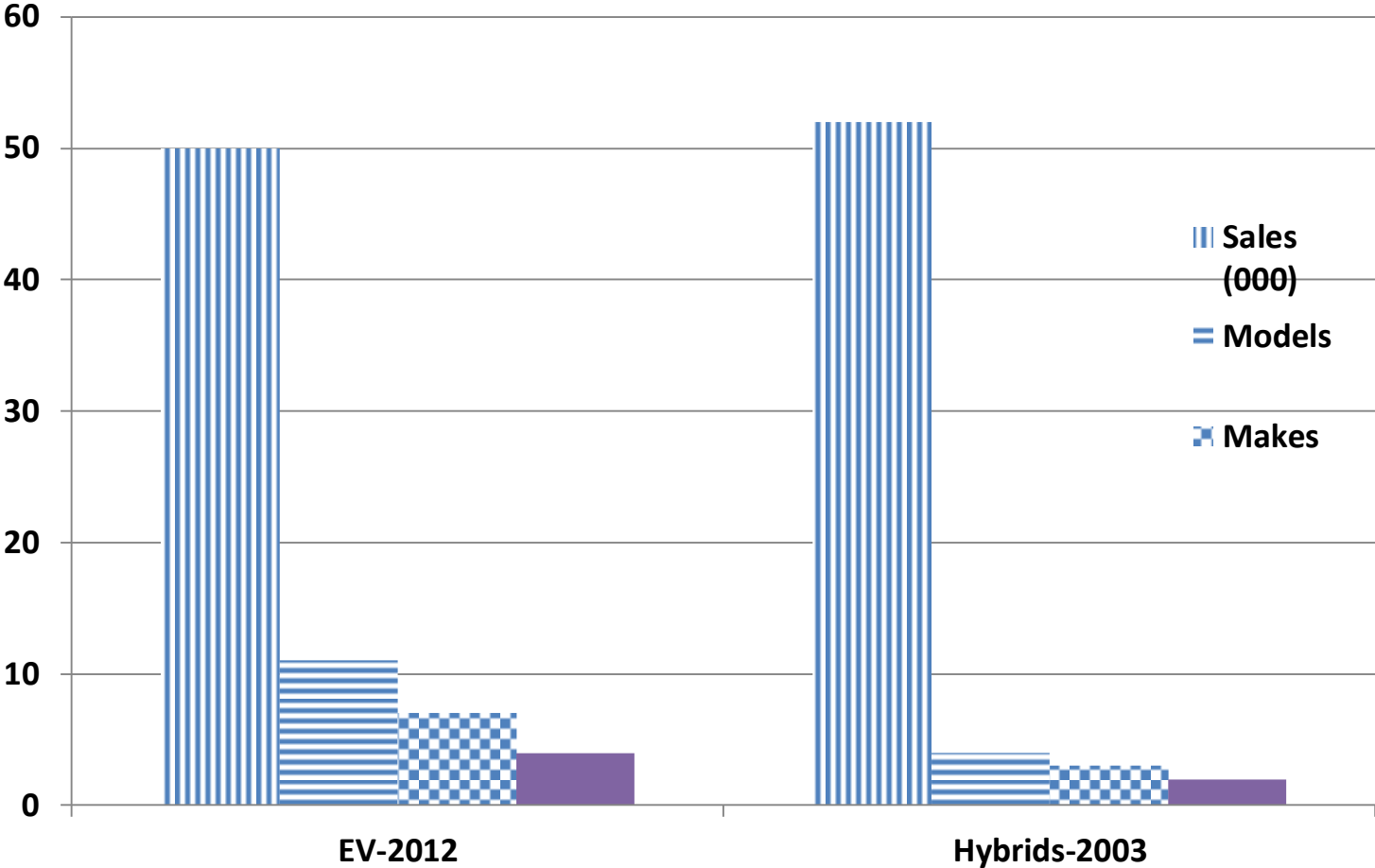


4-Cylinder Horse Power and Sales (Recession Excluded)

Units (000)

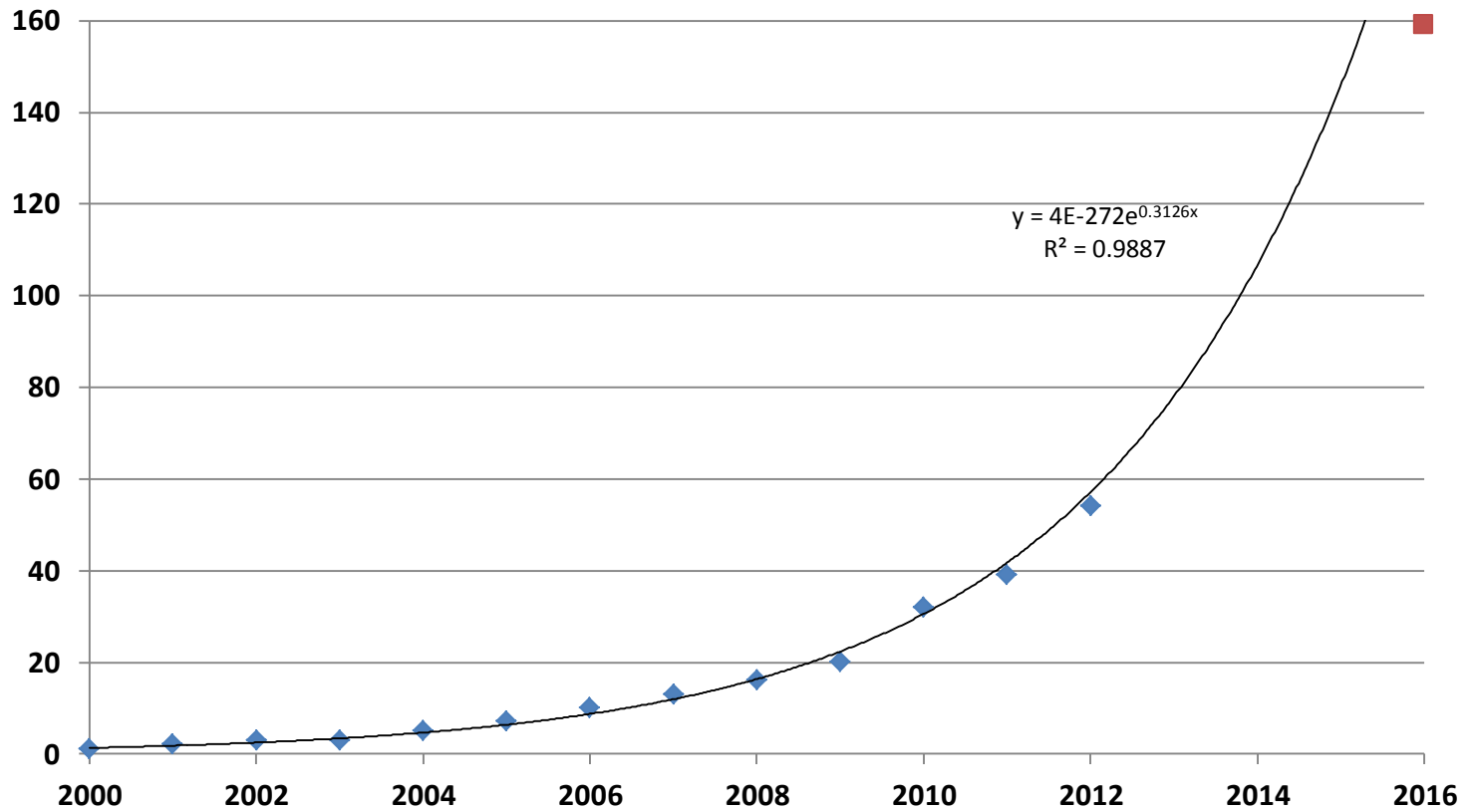


Early Development - Plug-ins v. Hybrids



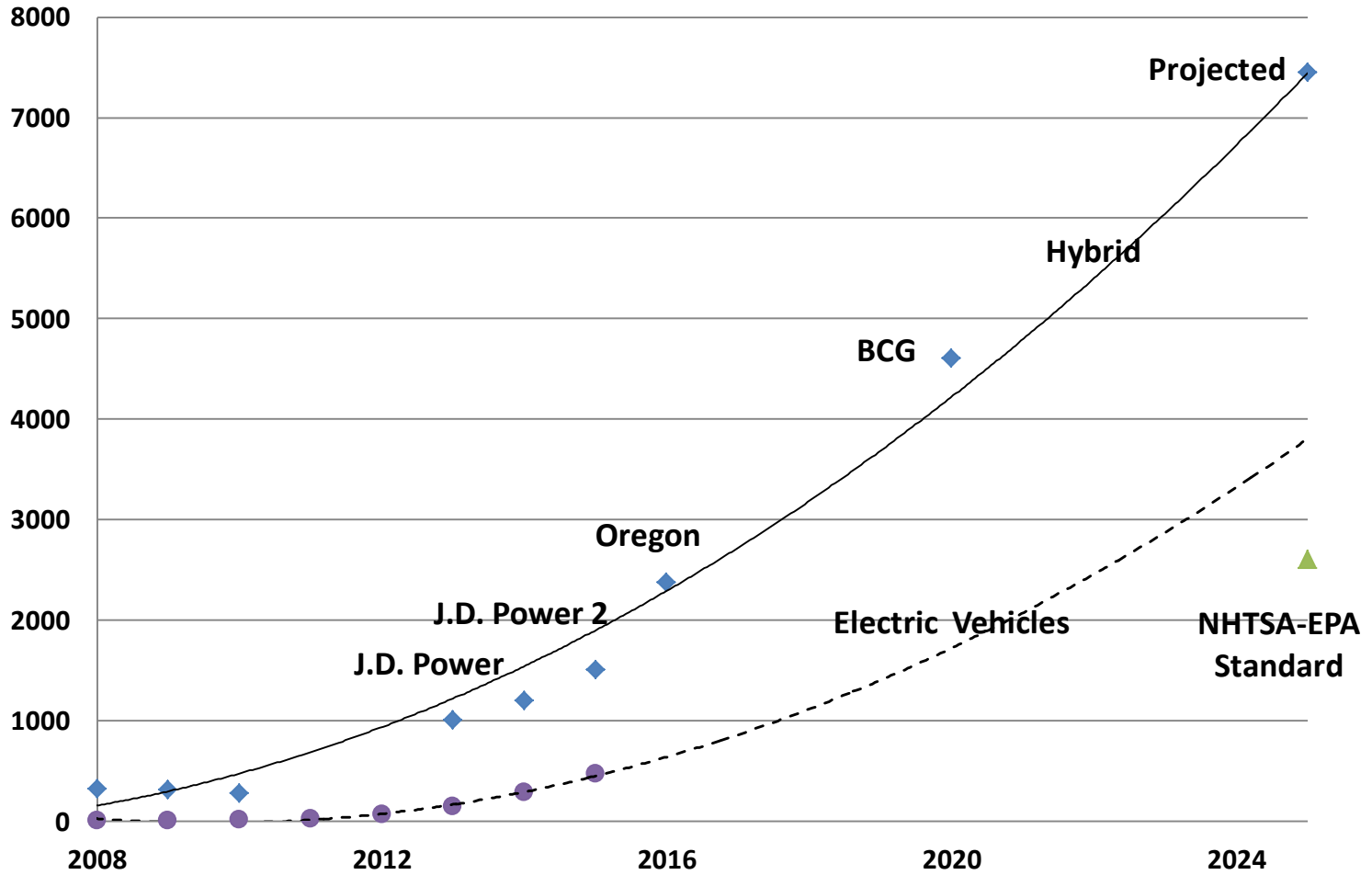
EV Models Offered, History + JD Power Projection

Number



INDUSTRY PROJECTIONS OF ELECTRIC VEHICLES SALES

000 Units



Projection of Hybrid Sales to 2025

Units (000)

