

July 2021

# National Cycle 3 ZEV Investment Plan Summary



# Corporate social responsibility pillars



## Enabling electric transportation

Commitment to making the world a more sustainable place by driving electric vehicle adoption through infrastructure and education



## Environmental sustainability

Commitment to being carbon-neutral or better, powering our stations with renewable energy and building infrastructure sustainably



## Community support

Unlocking electrification for all, including investments and education in diverse communities across the United States



## Equality & diversity

Striving to achieve diversity and inclusion in everything we do, from investing to hiring and supplier relationships



# Progress to date

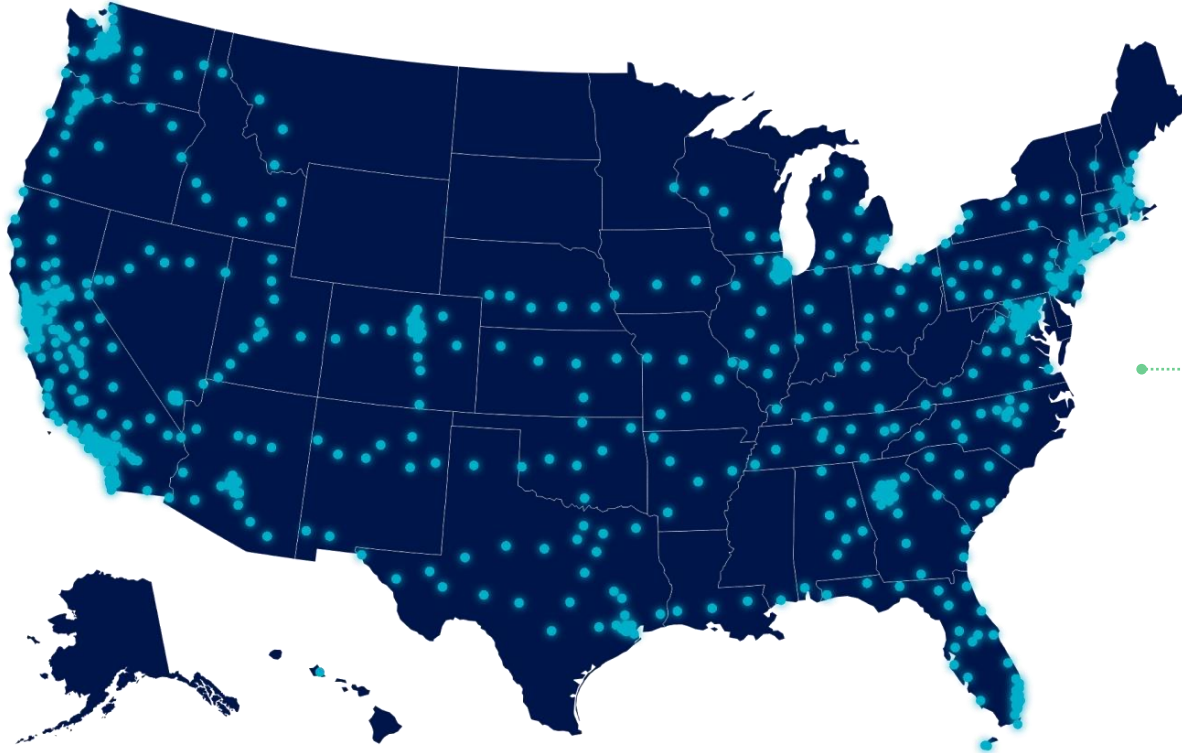
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- ⚡ Largest and most powerful open fast charger network
- ⚡ Serving 29 metros and 46 states, including two cross-country routes – nearly 90% of Americans live within 50 miles of a station
- ⚡ Award winning network with highest customer satisfaction
- ⚡ Expanding the market and access through education and outreach



# The largest open ultra-fast network

- Cycle 1 and Cycle 2 sites



## NUMBER OF STATIONS

May 2018

1

Today

633

December 2021\*

800

## NUMBER OF CHARGERS

May 2018

4

Today

2,717

December 2021\*

3,500

Data as of June 17, 2021  
\*Installed or Under Development

# Despite an unprecedented construction pace and state-of-the-art equipment, our customer satisfaction leads all other open networks

**Electrify America is devoted to providing the best customer experience for EV drivers**

Network Operations and Customer Contact Centers provide 24/7 technical and customer support

**Electrify America ranks #1 in quality and customer satisfaction**

Highest customer rating among open fast charge networks;  
2020 EV Charging Infrastructure Best-in-Test award winner

**Electrify America continues to innovate to develop a network that can serve all Americans**

Electrify America's Center of Excellence is a first-of-its-kind EV charging laboratory, testing and optimizing the latest ultra-fast charging technology







## National Cycle 3 ZEV Investment Plan

1. National outreach efforts
2. Infrastructure investments
3. Public education, awareness, access and marketing



# National outreach efforts

A year long, multi-pronged outreach effort captured insights from key stakeholders and informed Cycle 3 investments.

-  Active outreach to academics and industry
-  Listening sessions with regional government stakeholders and interest groups
-  Thorough review of 900+ website submissions for content and insights
-  Follow-up with website submitters via one-on-one phone calls and emails



# National outreach efforts

Themes and lessons learned from outreach campaign:

- ⚡ Public ultra-fast charging is key to inspiring range confidence and driving EV adoption
- ⚡ Continued deployment of DCFC to support MUD residents is a critical need
- ⚡ Charging is the primary barrier to ride-hail drivers going electric
- ⚡ Equality & Diversity and Environmental Sustainability CSR pillars have broad support



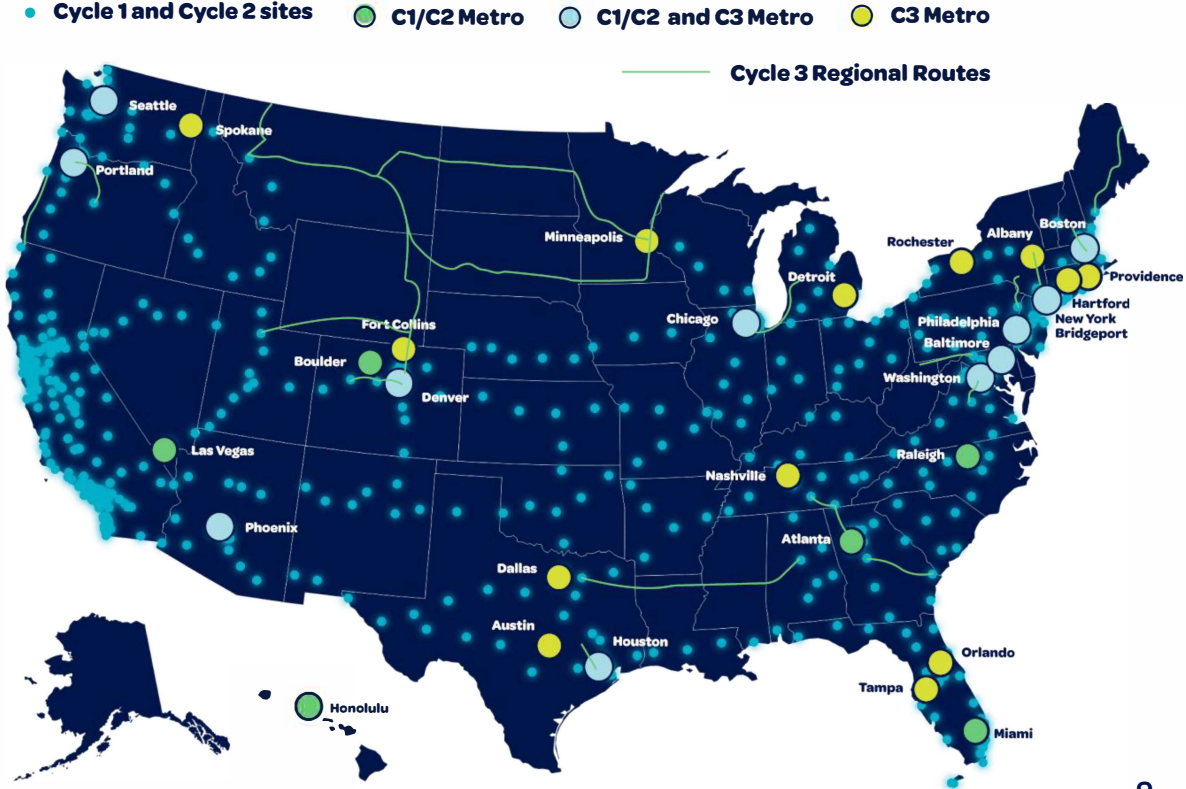


# Community-level ultra-fast charging infrastructure investments will be added in 25 metropolitan areas



Further expand access to ultra-fast charging stations across the United States:

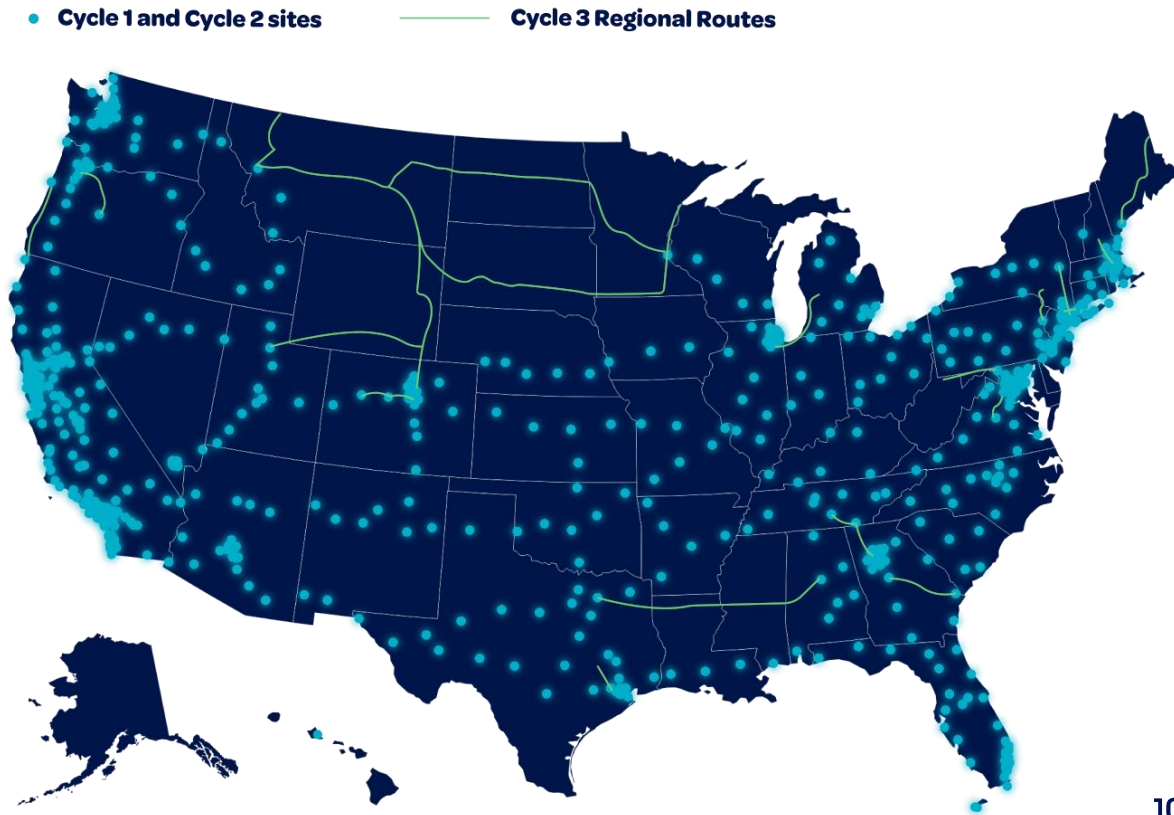
- Dallas-Fort Worth-Arlington, TX
- New York-Newark-Jersey City, NY-NJ-PA
- Austin-Round Rock-Georgetown, TX
- Boston-Cambridge-Newton, MA-NH
- Washington-Arlington-Alexandria, DC-VA-MD-WV
- Denver-Aurora-Lakewood, CO
- Detroit-Warren-Dearborn, MI
- Minneapolis-St. Paul-Bloomington, MN-WI
- Baltimore-Columbia-Towson, MD
- Seattle-Tacoma-Bellevue, WA
- Bridgeport-Stamford-Norwalk, CT
- Chicago-Naperville-Elgin, IL-IN-WI
- Hartford-East Hartford-Middletown, CT
- Houston-The Woodlands-Sugar Land, TX
- Nashville-Davidson-Murfreesboro-Franklin, TN
- Orlando-Kissimmee-Sanford, FL
- Philadelphia-Camden-Wilmington, PA-NJ-DE-MD
- Phoenix-Mesa-Scottsdale, AZ
- Portland-Vancouver-Hillsboro, OR-WA
- Tampa-St. Petersburg-Clearwater, FL
- Albany-Schenectady-Troy, NY
- Fort Collins, CO
- Providence-Warwick, RI-MA
- Rochester, NY
- Spokane-Spokane Valley, WA



# Electrify America will expand the nation's largest open DC fast charging network to serve all lower-48 states

Further expand access to charging infrastructure for highways and regional routes:

Minneapolis, MN to Butte, MT, I-90  
Minneapolis, MN to Billings, MT, I-94  
Dallas, TX to Birmingham, AL, I-20  
Cheyenne, WY to Salt Lake City, UT, I-80  
Chicago, IL to Grand Rapids, MI, I-94, I-196  
Denver, CO to Billings, MT, I-25  
Portland, ME to Bangor, ME, I-95  
Denver, CO to Glenwood Springs, CO, I-70  
Houston, TX to College Station, TX, SR-6, US-290  
Washington, DC to Morgantown, WV, I-70, I-68  
Minneapolis, MN to Duluth, MN, I-35  
Butte, MT to Great Fall, MT, I-15  
Allentown, PA to Scranton, PA, I-476  
Atlanta, GA to Nashville, TN  
Atlanta, GA to Savannah, GA, I-16  
Boston, MA to White Mountains, I-93  
New York, NY to Albany, NY, I-84  
Newport, OR to Crescent City, CA, US-97  
Portland, OR to Bend, OR, US-26, US-97  
Rockland, NY to White Plains, NY, I-87 / I-287  
Washington, DC to Charlottesville, VA, US-29



# Public education, awareness, access and marketing



## Boosting ZEV adoption through brand neutral campaigns. Our strategy:

Continue brand neutral messaging, similar to Normal Now campaign while also leveraging great work of others.



## Sponsoring many other efforts, including Plug In America and other prominent organizations:

Continued investment in organizations that promote EV education, ride & drive events, workforce development, and other activities to raise EV awareness and build capacity.



92% of EV ride & drive attendees said their impression of EVs is “better” after driving one<sup>1</sup>

78% of Americans think finding an EV charging station is at least moderately difficult<sup>2</sup>

65% of Americans have not driven or known someone who has driven an all-electric car or truck<sup>2</sup>

Sources:

1 – 2019 Participants from ten Plug In America Ride and Drives sponsored by Electrify America

2 – MacInnis, Bo, and Jon A. Krosnick. 2020. Climate Insights 2020: Electric Vehicles. Washington, DC: Resources for the Future

# \$300M to expand charging infrastructure, ZEV access, and education



## Infrastructure \$228M

- **Metro: \$90-130M**
  - Retail
  - Mobility
  - MUD
- **Highway and regional routes: \$100-120M**
  - Highway



## Education, Access, and Marketing \$42M

- **ZEV Adoption: \$24.5M**
  - TNC
  - Events/PR/social
- **Station Utilization: \$17M**
  - Advertising
  - Website/App
  - CRM
  - Events/PR/social
- **ZEV Adoption Access: \$0.5M**
  - Ride & Drives



# Thank You

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america

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