CVRP Implementation Status Update

CVRP Long-Term Planning Workshop

8 December 2015, Sacramento CA
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Additional thanks to John Anderson, Clair Johnson, and others at CSE
Outline

• **Background**

• **CVRP: Implementation Overview**
  – Rebate Processing
  – Outreach
  – Transparency

• **Long-term Planning Assets: Public Data & Tools**
  – Rebate Data & Dashboard
  – Survey Data & Dashboard

• **Summary of Program Participation**
  – Rebated Consumers: Who? Why?
Background
CSE’s Plug-In & Fuel-Cell Electric Vehicle (EV) Activities

Incentives Design & Administration

Consumer & Dealer Outreach

Stakeholder Engagement

Fleet Assistance & Clean Cities

PEV, Alt.-Fuel, & ZEV Planning & Implementation

2nd Life Battery Research & Vehicle-Grid Integration
CSE has processed >130k rebates totaling >$275M

**California (CVRP), 2010–present**
- 2007 Legislation (AB118, then AB8) allowing vehicle registration fees
- Greenhouse Gas Reduction Fund

**Massachusetts (MOR-EV), 2014–present**
- Regional Greenhouse Gas Initiative

**Connecticut (CHEAPR), 2015–present**
- Utility Settlement
- Both a vehicle rebate and dealer incentive
  - Consumer can also assign vehicle rebate to dealer
CVRP Implementation Overview
Rebate Processing
Application: Simplicity is Key

Step 1: Go to cleanvehiclerebate.org

Step 2: Select your vehicle and fill out application

Step 3: Submit supporting documentation

Step 4: Receive check in mail
Drive clean and save

California residents get up to $5,000 for the purchase or lease of a new, eligible zero-emission or plug-in hybrid light-duty vehicle.

Vehicles and eligibility

Apply within 18 months of purchase/lease of an eligible vehicle and before rebate funds are exhausted. See complete eligibility guidelines.

- Tesla Roadster: $2,500
- smart electric fortwo cabriolet: $2,500
- GEM e2: $900
- Toyota Prius Plug-In Hybrid: $1,500
- Mitsubishi i-MiEV: $7,500
Maneje limpio y ahorre

Los residentes de California pueden recibir hasta $5000 para la compra o el alquiler de un vehículo nuevo elegible, que puede ser un vehículo de cero emisiones o un vehículo híbrido enchufable liviano.

¿Es su primera vez en el CVRP?
Ver el estado de su solicitud
Solicite un reembolso

Vehículos y elegibilidad

Presente su solicitud dentro de los 18 meses posteriores a la compra o el alquiler de un vehículo elegible y antes de que se agoten los fondos para reembolsos.

Consulte los lineamientos de elegibilidad completos.

Vantage EVX1000  $900
Chevrolet Spark EV  $2,500
GEM e2  $900
Hyundai Sonata Plug-in Hybrid  $1,500
Tesla Roadster  $2,500

cleanvehiclerebate.org/es
Application: Simplicity is Key

- Streamlined application process (10 mandatory fields)
- Upload documents online or send via email
- Possible to complete at dealership
Application: Simplicity is Key

- Streamlined application process (10 mandatory fields)
- Upload documents online or send via email
- Possible to complete at dealership

One third of applications are submitted within **one day of purchase**
Over half of applications are submitted **within 7 days of purchase**
Nearly 80% of applications are submitted within 30 days of purchase
Processing: Automation is Key

- Eligibility pre-screening and application detail verification
- Application status updates and emails
- Reduced administrative burden and allows us to focus on approving applications

Applications approved in ~5 days from submittal
Check Sent Timeline

- Waitlist
- ~14k checks in 7 business days

Date Check Sent

Check Sent Timeline

Checks sent
Avg time from approval to check sent

Days
Checks Sent
Feb-14
Apr-14
Jun-14
Aug-14
Oct-14
Dec-14
Feb-15
Apr-15
Jun-15
Aug-15
Oct-15
Check Sent Timeline

Waitlist

~14k checks in 7 business days

Dates
- Feb-14
- Apr-14
- Jun-14
- Aug-14
- Oct-14

Checks sent

Avg time from approval to check sent

Days
- 0
- 20
- 40
- 60
- 80
- 100
- 120
- 140
- 160
- 180

Checks Sent
- 0
- 2,000
- 4,000
- 6,000
- 8,000
- 10,000
- 12,000
- 14,000
- 16,000
Outreach
Outreach: New Car Shoppers

Target Audience: Lowest Barriers to EV Adoption

• Homeowners
• 2-car households
• Affluent (HHI: $100K+)
• College educated+

Activities:

• Community and industry events with branded booth and marketing materials
• Digital marketing through CVRP Social Media pages and promotion
• Project website and new content
Outreach: New Car Shoppers

Target Audience: Lowest Barriers to EV Adoption

- Homeowners
- 2-car households
- Affluent (HHI: $100K+)
- College educated+

Activities:

- Cross-Program Collaboration
  - CVRP collateral distribution at events
  - Cross-promotion via digital marketing
  - Examples:
    - Statewide Test Drive Campaigns
    - Energy Upgrade California
Outreach: New Car Shoppers

Target Audience: Lowest Barriers to EV Adoption

- Homeowners
- 2-car households
- Affluent (HHI: $100K+)
- College educated+

Results FY 14-present:

- Events: +130
- Collateral Distributed: +7.5K
- Conversations: +14K
- CVRP website page views: ~25K/month
Outreach: Underserved Communities

Target Audience:
• Disadvantaged communities (DACs)
• Non-DAC low-to-moderate income consumers

Activities:
• Integrate CVRP messaging into community based organizations and other agencies through workshops and events
  – Charge Ahead Coalition
  – Energy Upgrade California
  – GRID Alternatives
  – Building Healthier Communities
  – Air Districts
Outreach: Underserved Communities

Target Audience:
- Disadvantaged communities (DACs)
- Non-DAC low-to-moderate income consumers

Activities:
- Increase usability and accessibility of the CVRP website and marketing collateral
  - New content targeted to underserved communities
  - Underserved communities FAQs
  - Multi-lingual resources
Outreach: Underserved Communities

Target Audience:
• Disadvantaged communities (DACs)
• Non-DAC low-to-moderate income consumers

Results FY 14-present:
• Events: +30 (40 additional planned for FY 15-16)
• Collateral Distributed: +1.5k
• Conversations: +1K
## Stacked Incentives: LMI Increased Incentive

<table>
<thead>
<tr>
<th>Vehicle Type</th>
<th>CVRP</th>
<th>CVRP-LMI (≤300% FPL)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hydrogen Fuel-Cell Electric Vehicles</td>
<td>$5,000</td>
<td>$6,500</td>
</tr>
<tr>
<td>Battery Electric Vehicles (&amp; i3 REx)</td>
<td>$2,500</td>
<td>$4,000</td>
</tr>
<tr>
<td>Plug-in Hybrid Electric Vehicles</td>
<td>$1,500</td>
<td>$3,000</td>
</tr>
<tr>
<td>Neighborhood Electric Vehicles</td>
<td>$900</td>
<td></td>
</tr>
<tr>
<td>Zero-Emission Motorcycles</td>
<td>$900</td>
<td></td>
</tr>
</tbody>
</table>
**Stacked Incentives: South Coast and San Joaquin**

- **Incentive Dollars**
  - $14,000
  - $12,000
  - $10,000
  - $8,000
  - $6,000
  - $4,000
  - $2,000
  - $0

- **Incentives**:
  - Incentives Total
  - CVRP - LMI Kicker
  - CVRP
  - Plus-up
  - EFMP

- **Stacked Incentives**:
  - BEV <225% FPL
  - PHEV <225% FPL
  - BEV <300% FPL
  - PHEV <300% FPL
  - BEV <400% FPL
  - PHEV <400% FPL

- **Incentive Levels**:
  - $13,500
  - $12,500
  - $11,500
  - $10,500
  - $8,000
  - $7,000

- **FPL** = federal poverty level (a function of household size). 300% of FPL for a 3-person HH is ~$73k/y.
Outreach: Dealerships & Sales Staff

- Quarterly sales staff webinars
- OEM- and dealer-association-sponsored group training
- Direct dealership outreach
- 1-on-1 inquiry support
- Dealership-targeted outreach brochure and EV marketing materials
Transparency
Transparency

- Real time or near-real time data updates
- Facilitates informed decision making for consumers and stakeholders
- Provides data for measuring incentive and outreach effectiveness
- Reduces administrative burden
Public Tools and Available Data

Planning Inputs/Assets
Rebate Dashboard: Filters

Filter by:
- Consumer type
- Vehicle category
- Make
- Region:
  - Air district
  - Utility territory
  - County
  - Legislative district
  - Disadvantaged Community status
  - Funding Source
- Application date
Rebate Dashboard: Results

Results by:
- Rebated vehicles and funds:
  - Life-of-project (grey headings) vs. filtered selection (black)
- Rebated vehicles:
  - By month
  - By vehicle category
    - Filtered totals and %
- Downloads:
  - Images
  - Raw data (incl. Census tract)
Rebate Map

- Rebated vehicles and funds over the life of the project by:
  - County
  - Utility
  - Air District
  - Zip Code (census tract coming soon)
  - State Assembly District
  - State Senate District
- PDF image download
Consumer Survey Dashboard

- All rebate recipients invited to take a survey
- >25,000 CVRP responses
- Topics include:
  - Demographics
  - Information channels
  - Purchase motivations and enablers
  - Dealership experience
  - Utility rate awareness
- Filter by: vehicle category, buy/lease, make, region
- Survey results reasonably represent all rebate recipients
Program Participation
Rebated Vehicles & Rebated Consumers
Program Participation

• Rebated Vehicles (application data)
  – How many? What type?
  – Where?
  – Rebated at what rate?

• Rebated Consumers (survey data)
  – Who?
    • Demographic and housing characteristics
    • Income comparisons
  – Why?
    • Motivations to purchase
    • Impact of rebate
How many? What type?

Rebated Vehicles
Cumulative CVRP Rebates by Vehicle Category

Through Nov 2015, approved and in progress applications
Share by Vehicle Category:
All PEVs, Rebates, DAC Rebates

Rebates through Nov 2015. Overall market includes vehicles registered prior to 6/1/2015 and uses content supplied by R.L. Polk & Co.; Copyright © R.L. Polk & Co., 2015. All rights reserved
Rebate Share by Major Brand: CA & DACs

- **Chevrolet**: 21%
- **Nissan**: 20%
- **Tesla**: 15%
- **Toyota**: 14%
- **Ford**: 12%
- **Other Brands**: 9%
- **FIAT**: 9%
- **Other Brands**: 13%
- **Ford**: 9%
- **Toyota**: 16%
- **Tesla**: 8%
- **Nissan**: 18%

*Through Nov 2015, approved and in progress. “Major” > 10,000 rebates*
Rebate Dollars to Disadvantaged Communities

"In DACs" Goal (Census Tracts) - 6%
"Benefitting DACs" Goal (Zip Codes) - 37%

Vehicles purchased/leased through Nov 2015, approved and in progress
Context Is Important (2014)

![Bar chart showing rebate penetration.]

- CA Population: 0.12%
- CA Driving Age Population (16+): 0.15%
- New LDV Sales: 2.5%
- New Comparable LDV Sales: 3.0%

DACs as a Percentage of Entire State (2014)

Rebates as a % of Comparable New Car Sales
(2014 calendar year)

Statewide DAC

Rebates per Comparable LDV Sale

Rebates

DACs = 6.3% of CA

In 1Q2015, DACs = 45%

DACs = 38% of CA

Includes vehicles purchased/registered in 2014. Uses content supplied by R.L. Polk & Co.; Copyright © R.L. Polk & Co., 2015. All rights reserved
Where?

Rebated Vehicles
Rebates by County (thru May 2015), Growth (2013 to 2014)

16,995 Rebates
937 Growth
28,935 Rebates
59% Growth
2,74% Growth
29% Growth
Rebates by County & Normalized to Comparable Sales (thru May 2015)

Per 1,000 vehicles
Rebated at what rate?

Rebated Vehicles / Eligible Vehicles
CVRP Participation (March 2010–March 2015)*

- Statewide, life-of-program average participation rate >74%
- >67% for PHEV consumers
- >81% for BEV consumers

*Topic brief available for download from the Program Reports page at https://cleanvehiclerebate.org

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CVRP Participation by Major Vehicle Category

Participation Rate

<table>
<thead>
<tr>
<th>Year</th>
<th>BEV</th>
<th>PHEV</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1 2012</td>
<td>52%</td>
<td>55%</td>
</tr>
<tr>
<td>Q2 2012</td>
<td>52%</td>
<td>55%</td>
</tr>
<tr>
<td>Q3 2012</td>
<td>69%</td>
<td>70%</td>
</tr>
<tr>
<td>Q4 2012</td>
<td>67%</td>
<td>96%</td>
</tr>
<tr>
<td>Q1 2013</td>
<td>67%</td>
<td>55%</td>
</tr>
<tr>
<td>Q2 2013</td>
<td>67%</td>
<td>55%</td>
</tr>
<tr>
<td>Q3 2013</td>
<td>67%</td>
<td>55%</td>
</tr>
<tr>
<td>Q4 2013</td>
<td>67%</td>
<td>55%</td>
</tr>
</tbody>
</table>

BEV: Battery Electric Vehicle
PHEV: Plug-in Hybrid Electric Vehicle

Topic brief available for download at https://cleanvehiclerebate.org
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CVRP Participation by Major Vehicle Brand

- Chevrolet: 77%
- Ford: 59%
- Nissan: 86%
- Tesla: 80%
- Toyota: 64%

Topic brief available for download at https://cleanvehiclerebate.org
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CVRP Participation by Vehicle Category
(for major brands offering multiple categories)

- **Chevrolet**: 77% PHEV, 78% BEV
- **Ford**: 56% PHEV, 77% BEV
- **Toyota**: 63% PHEV, 76% BEV

Topic brief available for download at https://cleanvehiclerebate.org
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CVRP Participation by County: PHEVs and BEVs

PHEV Participation
- Insufficient Data
- 1%–63%
- 64%–71%
- 72%–73%

BEV Participation
- Insufficient Data
- 1%–63%
- 64%–71%
- 72%–77%
- 78%–95%

Topic brief available for download at https://cleanvehiclerebate.org
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Who is participating?
Rebated Consumers
Rebated Consumer Characteristics

**Gender**
- Female: 25%
- Male: 75%

**Age**
- 80+: 1%
- 70-79: 5%
- 60-69: 16%
- 50-59: 27%
- 40-49: 28%
- 30-39: 19%
- 21-29: 4%
- 16-20: 0%

**Education**
- Postgraduate degree: 49%
- Bachelor's degree: 34%
- Associate degree: 5%
- Some college, no degree: 10%
- High school graduate or equivalent: 2%
- 12th grade or less: 1%

**Housing**
- Own: 85%
- Rent: 15%

**Total Responses:** 25,217

Overall Time Frame: 9/1/2012–11/15/2015
### Majority Characteristics of CVRP Consumers

<table>
<thead>
<tr>
<th></th>
<th>CVRP rebate recipients (CVRP 2012–2015)</th>
<th>New-vehicle &quot;intenders&quot; (CHTS 2012)</th>
<th>CA residents (Census 2014)</th>
</tr>
</thead>
<tbody>
<tr>
<td>40–59 years old</td>
<td>55%</td>
<td>52%</td>
<td>27%</td>
</tr>
<tr>
<td>Bachelor’s Postgraduate</td>
<td>83%</td>
<td>66%</td>
<td>31%</td>
</tr>
<tr>
<td></td>
<td>49%</td>
<td>34%</td>
<td>11%</td>
</tr>
<tr>
<td>Male</td>
<td>75%</td>
<td>49%</td>
<td>50%</td>
</tr>
<tr>
<td>White/Caucasian</td>
<td>64%</td>
<td>76%</td>
<td>62%</td>
</tr>
<tr>
<td>Detached homes</td>
<td>83%</td>
<td>75%</td>
<td>66%</td>
</tr>
<tr>
<td>$50–200k/y household income</td>
<td>61%</td>
<td>58%</td>
<td>51%</td>
</tr>
</tbody>
</table>

Weighted CHTS data
By Product Type

PHEV consumers tend to more often be:

• Older
• Female
• Renters
• Multi-unit dwellers
• 1-vehicle households
• Lower income

Total PHEV Gender Responses: 9,266, BEV Gender Responses: 14,942
Overall Time Frame: 9/1/2012–11/15/2015
Over Time: Gender

Total Responses: 23,371
Overall Time Frame: 9/1/2012–9/30/2015
Rebate Recipients Over Time: Housing Type

Overall Time Frame: 9/1/2012–9/30/2015

Total Responses: 23,859
Spotlight: Income Comparisons
Rebate Recipient Household Income by Product Type

Total Responses: 20,251
Overall Time Frame: 9/1/2012–11/15/2015
CVRP Income Dist. Through Time

Total Responses: 20,251
Overall Time Frame: 9/1/2012–11/15/2015
New-vehicle “intenders” and CVRP Income Distributions: Unweighted vs. Weighted

Weighted CVRP (2012-2014) & CHTS (2012) data
## California Median Household (HH) Incomes

<table>
<thead>
<tr>
<th>California population (Census 2014)</th>
<th>New-vehicle “intenders” (CHTS 2012)</th>
<th>CVRP rebate recipients (CVRP 2014)</th>
</tr>
</thead>
<tbody>
<tr>
<td>~$61,500</td>
<td>$75,000-$99,999</td>
<td>$150,000-$174,999</td>
</tr>
</tbody>
</table>

Weighted or unweighted CVRP (2014) & weighted or unweighted CHTS (2012) data
## CA Median HH Incomes: All vs. DAC

<table>
<thead>
<tr>
<th></th>
<th>New-vehicle “intenders” (CHTS 2012)</th>
<th>CVRP rebate recipients (CVRP 2014)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>All:</strong></td>
<td>$75,000-$99,999</td>
<td>$150,000-$174,999</td>
</tr>
<tr>
<td><strong>DAC:</strong></td>
<td>$25,000-$49,999</td>
<td>$75,000-$99,999</td>
</tr>
<tr>
<td><strong>DAC/All</strong></td>
<td>25-67%</td>
<td>43-67%</td>
</tr>
</tbody>
</table>

Weighted or unweighted CVRP (2014) & weighted CHTS (2012) data
New-vehicle “intenders” and CVRP Income Distributions: All vs. DACs

- **CVRP (All)**
- **CVRP (DAC)**
- **CHTS (All)**
- **CHTS (DAC)**

**Weighted CVRP (2014) & weighted CHTS (2012) data**

Income brackets:
- $250,000 or more
- $200,000 to $249,999
- $150,000 to $199,999
- $100,000 to $149,999
- $75,000 to $99,999
- $50,000 to $74,999
- $25,000 to $49,999
- Less than $24,999
Rebate Recipients and New-vehicle “intenders” with Low-to-Moderate Income

<table>
<thead>
<tr>
<th></th>
<th>LMI (CVRP, 2014)</th>
<th>LMI (CHTS, 2012)</th>
</tr>
</thead>
<tbody>
<tr>
<td>CA Overall</td>
<td>4% - 10%</td>
<td>28% - 42%</td>
</tr>
<tr>
<td>In DACs</td>
<td>10% - 25%</td>
<td>57% - 71%</td>
</tr>
</tbody>
</table>

Weighted CVRP (2014) & weighted CHTS (2012) data
Why are they purchasing/leasing?

Rebated Consumers
### Primary Purchase Motivations: BEV vs. PHEV

#### BEV Respondents

- **Total Responses:** 15,274
- **Overall Time Frame:** 9/1/2012 – 11/15/2015

<table>
<thead>
<tr>
<th>Motivation</th>
<th>BEV Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Saving money on fuel costs</td>
<td>30%</td>
</tr>
<tr>
<td>Reducing environmental impacts</td>
<td>25%</td>
</tr>
<tr>
<td>HOV lane access</td>
<td>15%</td>
</tr>
<tr>
<td>Increased energy independence</td>
<td>10%</td>
</tr>
<tr>
<td>Vehicle performance</td>
<td>5%</td>
</tr>
<tr>
<td>A desire for newest technology</td>
<td>5%</td>
</tr>
<tr>
<td>Other</td>
<td>0%</td>
</tr>
</tbody>
</table>

#### PHEV Respondents

- **Total Responses:** 9,533
- **Overall Time Frame:** 9/1/2012 – 11/15/2015

<table>
<thead>
<tr>
<th>Motivation</th>
<th>PHEV Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Saving money on fuel costs</td>
<td>40%</td>
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<tr>
<td>A desire for newest technology</td>
<td>5%</td>
</tr>
<tr>
<td>Other</td>
<td>0%</td>
</tr>
</tbody>
</table>
Primary Purchase Motivations: Non-Tesla vs. Tesla BEV

**BEV Leases**
- **Saving money on fuel costs**: Highest priority for BEV leases.
- **Reducing environmental impacts**: Second most important.
- **HOV lane access**: Third priority.
- **Increased energy independence**: Fourth priority.
- **Vehicle performance**: Fifth priority.
- **A desire for newest technology**: Least important.
- **Other**: Minor considerations.

**Total Responses**: 9,627
**Overall Time Frame**: 9/1/2012–11/15/2015

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**Tesla Purchases**
- **Saving money on fuel costs**: Highest priority for Tesla purchases.
- **Reducing environmental impacts**: Second most important.
- **HOV lane access**: Third priority.
- **Increased energy independence**: Fourth priority.
- **Vehicle performance**: Fifth priority.
- **A desire for newest technology**: Sixth priority.
- **Other**: Minor considerations.

**Total Responses**: 3,748
**Overall Time Frame**: 9/1/2012–11/14/2015
Primary Purchase Motivations: Non-Tesla vs. Tesla BEV

San Bernardino/Riverside BEV Leases
- Saving money on fuel costs: 60%
- Reducing environmental impacts: 10%
- HOV lane access: 5%
- Increased energy independence: 3%
- A desire for newest technology: 3%
- Vehicle performance: 2%
- Other: 20%

Total Responses: 335
Overall Time Frame: 9/17/2012–10/31/2015

Marin Tesla Purchases
- Saving money on fuel costs: 20%
- Reducing environmental impacts: 40%
- HOV lane access: 1%
- Increased energy independence: 10%
- A desire for newest technology: 10%
- Vehicle performance: 10%
- Other: 10%

Total Responses: 103
Overall Time Frame: 11/9/2012–9/12/2015
CVRP Impact on Purchase/Lease

Would you have purchased or leased your vehicle without the state vehicle (CVRP) rebate?

- Yes
- No
Parting Thoughts
Cumulative CA Zero Tailpipe Emission Vehicles (ZEVs)

Goal: 1.5M by 2025

Most recent quarter partial (data thru May 2015).
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We work nationally in the clean energy industry and are always open to exploring partnership opportunities.

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Comparison Groups & Data sources

• **General population:**
  – U.S. Census Bureau, 2009-2013 5-Year American Community Survey

• **Population intending to buy a new vehicle within 5 years:**
  – Caltrans, 2012 California Household Travel Survey (CHTS)
  – Note: CHTS was drawn from a representative sample, but how well do new-vehicle “intenders” represent state’s new-vehicle buyers?

• **Clean Vehicle Rebate Project (CVRP):**
  – Consumers:
    • CSE, California Air Resources Board CVRP “EV Consumer Survey,” 2014 data or “EV Consumer Survey” and “Clean Vehicle Consumer Survey,” 2012–2015 data
  – Vehicles:
    • CSE, California Air Resources Board CVRP rebate application data, March 2010–November 2015 (or appropriate subset)

• **Overall vehicle markets:**
  – Polk registration data March 2010–May 2015