

February 2025

NBCUniversal

Profiling the Hybrid Consumer



Executive Summary

Hybrid owners bridge the gap between ICE and EV owners in demographics, lifestyle, motivations, and media consumption



Hybrid owners' demographics are a blend of ICE & EV owners

Hybrid owners fall between ICE and EV owners in HHI and gender split, with an older age profile that more closely aligns with ICE owners.



While EV & Hybrid owners share similar overall purchase behaviors, Hybrid owners are **unique in their interests and values**

Hybrid owners are more likely to support social causes, value their local community, and have an interest in arts & culture.



While there are multiple motivators that lead hybrid owners to purchase, **consumers still have unanswered questions**

Hybrid buyers prioritize the environment, brand loyalty, and driving practicality, but have questions around maintenance, range and cost.



EV & Hybrid owners have **similar media consumption behaviors**

Hybrid owners watch content across linear TV & streaming and are receptive to ads.

Research Sources

To understand the Hybrid Consumer, we gathered insights from the following first-party and third-party data sources.

Third-Party Data

MRI | SIMMONS

Consumer Syndicated

Audience Groups:

Hybrid Owners and EV Owners

GWI.

Consumer Syndicated

Audience Groups:

Hybrid Owners and EV Owners

MINTEL

Audience Group:

Hybrid Considerers

First-Party Data

NBCUniversal

Primary Research

Audience Group:

EV/Hybrid Considerers

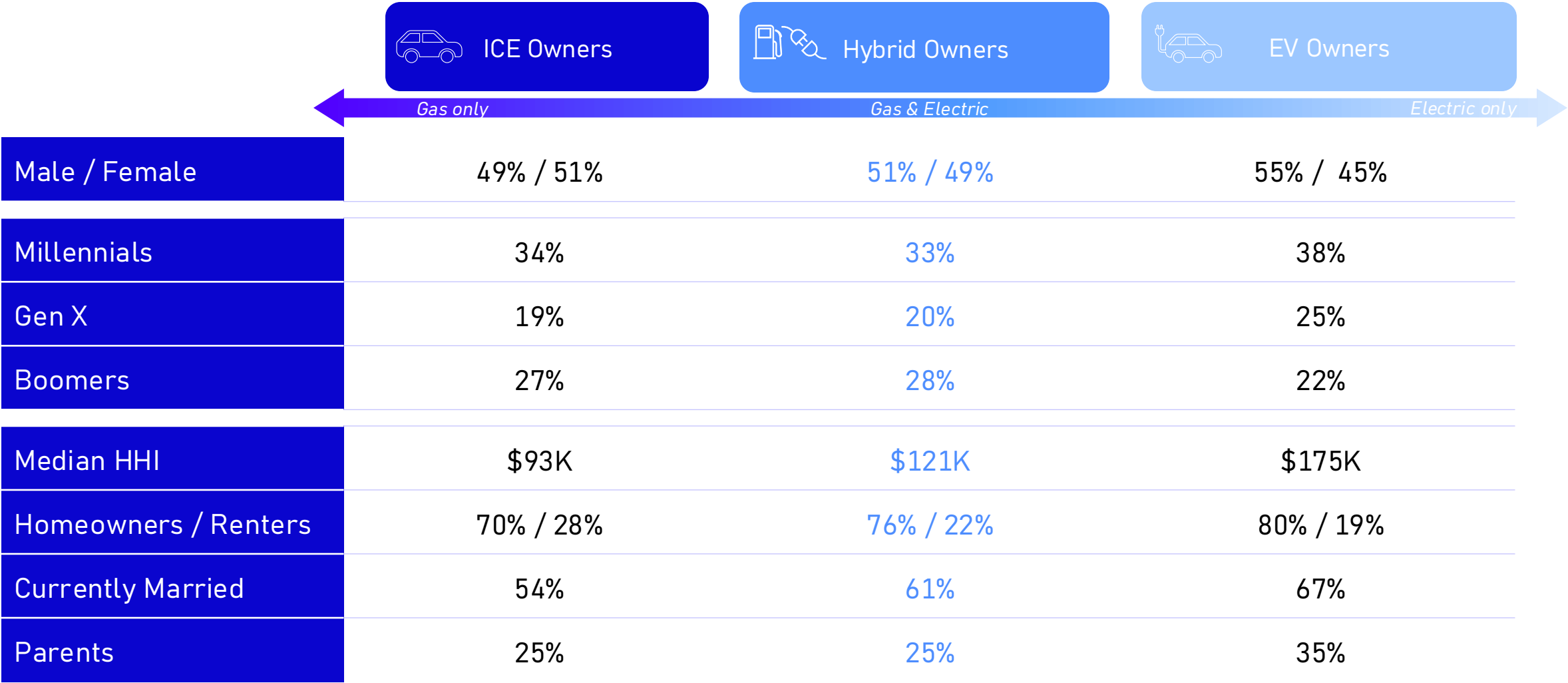
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Proprietary Data

Audience Group:

In Market/Owners of Hybrids

Hybrid owners' demographics are a blend of ICE & EV owners



Source: MRI-Simmons Cord Evolution Study, November 2024

While EV & Hybrid owners share similar purchase behaviors...



Prefer **eco-friendly** products/brands

52% say they are more likely to buy a brand that is committed to reducing its impact on the environment



Conduct **online research** before purchase

83% say they read online reviews before purchasing a product



Prioritize **quality**

69% say they buy based on quality, not price

...Hybrid owners are unique in their interests and values



Support **social causes**

34% say they will participate in a civil protest if they feel strongly about an issue (6% more likely than EV owners)



Value their **local community**

42% say they are more likely to buy products from companies that advertise or sponsor events in their community (9% more likely than EV owners)



Interest in **arts & culture**

50% say they are very interested in the fine arts (14% more likely than EV owners)

Key Motivations for Choosing a Hybrid Vehicle

Hybrid buyers prioritize the environment, brand loyalty, driving practicality, and cost efficiency

Environmental Consciousness

Hybrid owners prioritize **environmental responsibility**, which is reflected in their vehicle choices



63%

of hybrid owners believe buying an alt-fuel vehicle is the **right thing to do to protect the environment** (131i)¹

Brand Loyalty

Purchasers are **brand loyal** with brand consideration a top priority



54%

of hybrid owners **remain loyal to their vehicle brand** and continue purchasing from it¹



"I'm tired of buying gas and want a car that is **more friendly for the environment and easier on my wallet**. I get a sense of guilt when I go to the pump because I feel like **it's time to do better for myself and my community**."

Male, 52-59
EV/Hybrid Considerer³

Driving Practicality

Hybrids offer **greater flexibility** and **ease of use** compared to EVs, making them a practical choice for many consumers



73%

of consumers view hybrid vehicles as **more practical** than battery-only vehicles²

Maintenance Savings

Hybrids provide a **cost-effective alternative** by combining the benefits of electrification with the familiarity of ICE vehicles



77%

of hybrid considerers perceive EVs as costly to maintain and repair²

Alt-fuel considerers still have questions around hybrid maintenance, range, and cost

“

“It’s tough to find clear info on the **long-term battery replacement costs** for EVs and hybrids. Also, I’d like more details on **how much maintenance really differs** between these options in the long run.”

Male, 23-27, EV/Hybrid Considerer

“

“I’d also like to know more about how **hybrid vehicles perform in terms of fuel savings** over the long term, considering the additional complexity of the system.”

Male, 36-43, EV Owner

“

“I looked for information about **gas mileage, maintenance, car expectancy, cost of parts, and the environmental impact** hybrid cars have in comparison to traditional gas/diesel vehicles.”

Female, 23-27, EV/Hybrid Owner



Hybrid owners access content across streaming and traditional TV and are receptive to ads

on par with EV owners

HOW THEY WATCH

80%

of hybrid owners stream weekly¹



74%

of hybrid owners watch live traditional TV weekly¹



Cordless

Do not have a traditional TV subscription

30%

Hybrid Owners

Cord Loyalists

Have a traditional TV subscription, with no intention of canceling

59%

**Cord Shaver/
Cutter Intenders**

Plan to cut down or cancel traditional TV subscription

11%

HOW THEY ENGAGE



Hybrid owners are **29% more likely** than EV owners to **discover brands via TV ads**²



Hybrid owners are more likely than EV owners to value **honesty**, **reliability**, and **tradition** in a brand²



33% of hybrid owners say they like that ads on streaming services are **interactive**, on par with EV owners¹

Source: 1. MRI-Simmons Cord Evolution Study, November 2024; 2. GWI USA, Q4'23-Q3'24

Connecting on NBCU

Hybrid owners are engaging with NBCU content across screens

In-Market /
Owners of Hybrids

Interest/Owning Households



57.7M

NBCU Cross-platform
HH Reach

What they're watching by
reach



What they're watching by
index



What they will
be watching:

SUIT'S LA

LONG
BRIGHT
RIVER

OPRY
100

LOCKERBIE
A SEARCH FOR TRUTH

bravo LOVE
HOTEL

Sources: NBCU Reach and Content Watched based on NBCU in-house audience insights utilizing 1P/3P data, analysis pulled as of 2.14.2025, Cross platform. Base: HH, Target Audiences: Consumers likely to purchase a new hybrid vehicle in the next 12 to 24 months. Those who have previously owned or currently own a hybrid vehicle. This audience is identified through self-reported data and aggregated VIN data (excluding DPPA-related information), indicating a demonstrated interest in hybrid vehicles. These individuals represent the core market for new hybrid car purchases., 2024

*See notes section for full segment definitions & sourcing details. What Are They Watching? Based on index (precision) or scale (reach); top 10 titles viewed in 2024. Limited to programs with 1%+ Reach Only.

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Thank You

Interested in learning more? Please contact the Auto Category Strategy Team
Megan Ryan, Nikita Tolani, Melissa Perron, Hayley Bass, Ray Mo

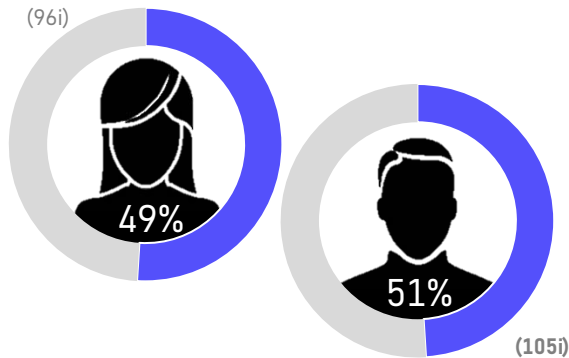


Demographic Snapshot of Hybrid Owners

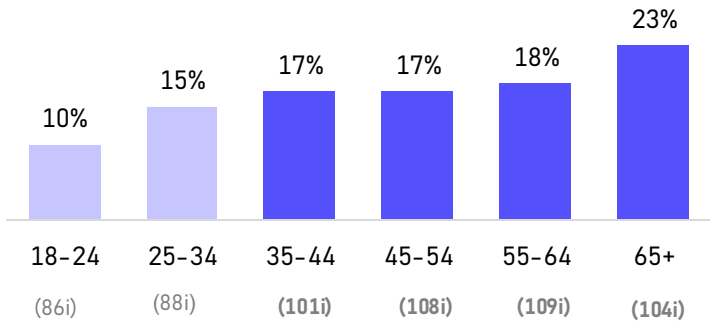
General Statistics

Median Household Income	\$121K
Median Age	50
Children in Household	25%
Homeowners	76%
Renters	22%

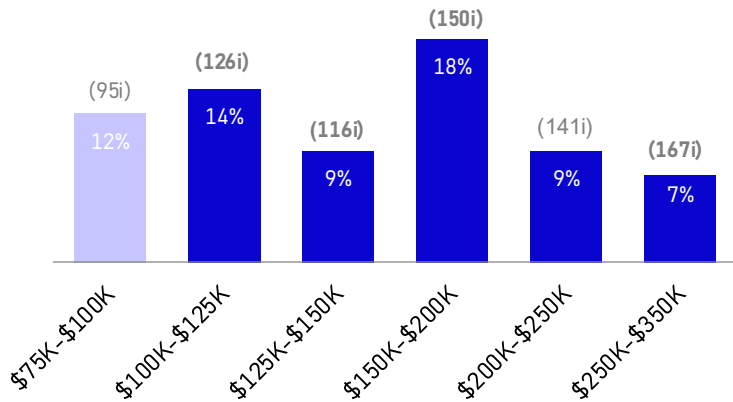
Gender



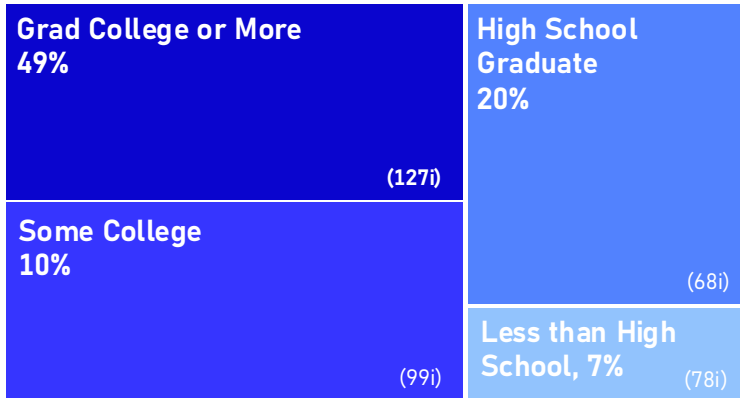
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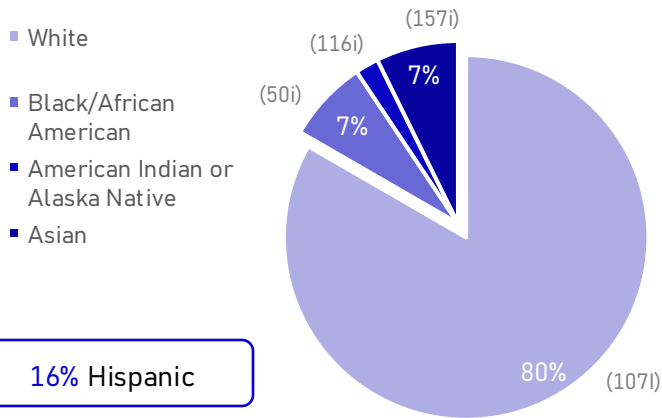
Household Income



Education



Race

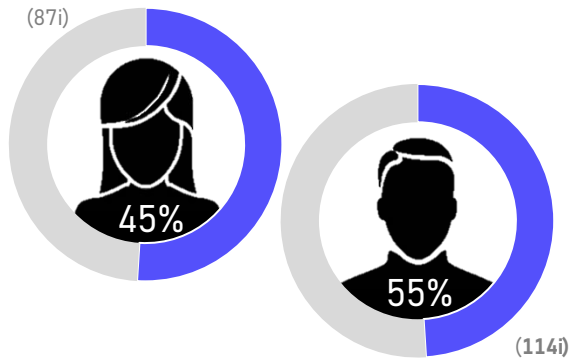


Demographic Snapshot of EV Owners

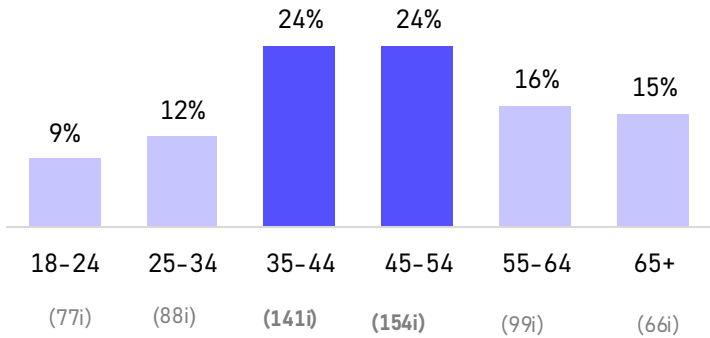
General Statistics

Median Household Income	\$175K
Median Age	47
Children in Household	35%
Homeowners	80%
Renters	19%

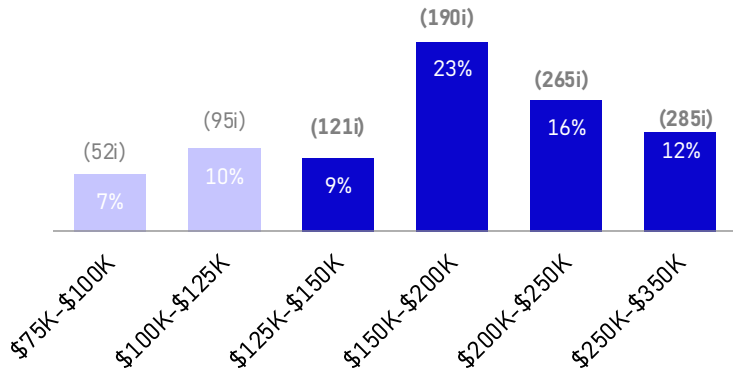
Gender



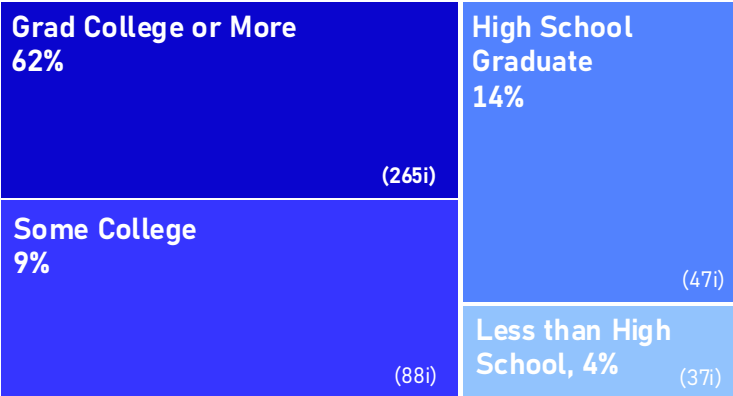
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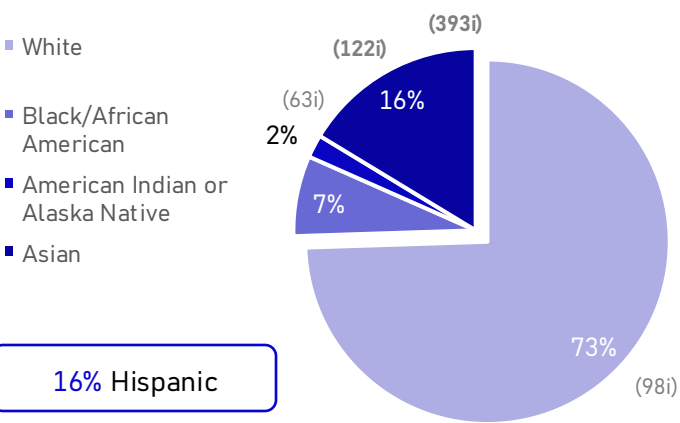
Household Income



Education



Race



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Owners of
Electric Vehicles

Interest/Owning Households



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