GCC Electric Vehicle Adoption Strategy

Unlocking Consumer Demand and Overcoming Infrastructure Bottlenecks across Saudi Arabia and the UAE

Executive Research Report

July 28, 2026 · Sentink Survey Platform · n = 102 respondents

EV Market Transition Momentum Accelerates Across Key GCC Urban Hubs

41%	79%	58%	63%
EV Owners	Consider EV purchase in next 12 months	Cite high purchase price as a barrier	Incentivized by free charging

WHAT THIS MEANS FOR THE BUSINESS

- While technology and safety are paramount for EV consideration (73% for safety, 65% for tech), the parallel importance of price suggests a complex trade-off for consumers, where cutting-edge features must be balanced against affordability to unlock mass-market appeal.
- "Male" absorbs 54% of choice in Gender, which narrows where the offer actually has to win and turns spend elsewhere into a distraction.
- A 35% pull toward "35–44" is a retention lever rather than a passing preference: the segment choosing it has already named what would keep it.

Demographic Composition Reflects High License Ownership and Prime Purchasing Age Groups

STUDY OBJECTIVES

- The demographic profile of potential EV buyers strongly aligns with established car ownership and prime purchasing demographics, indicating a natural, rather than nascent, market entry.
- A significant majority (83%) of respondents hold driver's licenses, underscoring that the core audience for EVs is already integrated into the driving ecosystem, reducing a primary barrier to adoption.
- The concentration of respondents in the 25-44 age bracket (69%) signifies that the market is comprised of individuals in their peak earning and spending years, directly correlating with the ability to absorb higher vehicle costs.
- Income distribution, while varied, shows a substantial segment (41%) earning between 10,000-20,000 SAR/AED monthly, a bracket capable of considering premium purchases, further validating the current market's readiness for EV adoption.
- Nationality splits reveal a strong representation from key GCC markets (Saudi 52%, Emirati 46%), suggesting that EV adoption trends are driven by the most significant regional economies, offering a focused target for market entry strategies.

METHODOLOGY

Survey Fieldwork	**Electric Vehicle Adoption Survey**
Total Responses	**162**
Completed Interviews	**102**
Completion Rate	**63%**
Key Markets Covered	**Kingdom of Saudi Arabia (52%), United Arab Emirates (46%)**
Primary Age Groups	**35-44 (35%), 25-34 (34%)**

01

Who We Heard From

Demographic and geographic composition of the survey sample

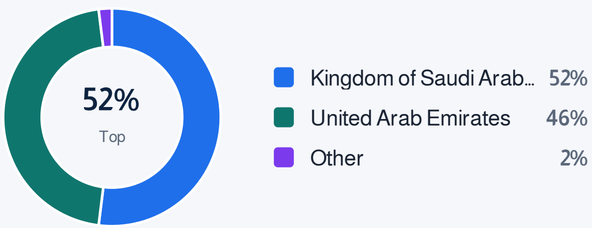
A balanced read across sample segments

RESPONDENT SNAPSHOT

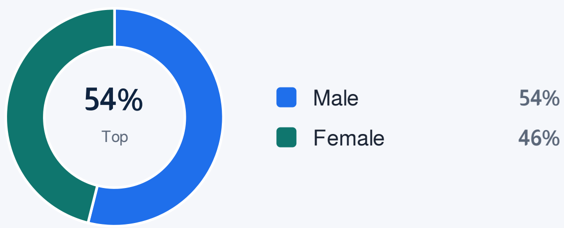
102

Total respondents

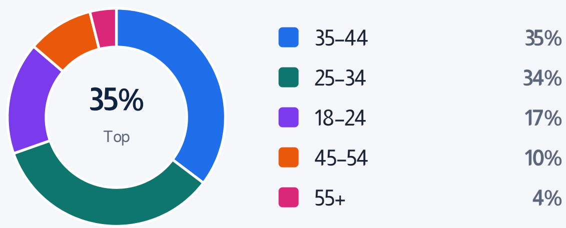
In which country do you currently reside?



Gender



Age Group



02

Adoption Drivers & Value Priorities

Safety and Advanced Technology Command the Baseline Standard for EV Selection

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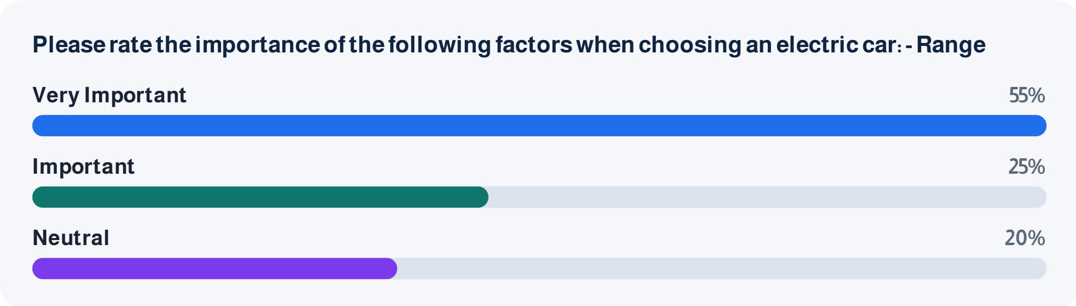


EXECUTIVE INSIGHT

The previous page highlighted that prime purchasing demographics are interested in EVs. This data reveals that for this engaged audience, fundamental vehicle attributes are no longer differentiators but table stakes. Safety is paramount, with 73% rating it 'Very Important', and advanced technology is nearly as critical, cited by 65%. While range anxiety is often discussed, 55% consider it 'Very Important', indicating it is a necessary condition, not a primary driver of choice for this group. These factors collectively form the baseline expectation for any EV considered, meaning brands focusing solely on these elements will struggle to stand out.

STRATEGIC IMPLICATION

This finding directly impacts product development and marketing investment priorities. It suggests that resources allocated to highlighting safety and technology as unique selling propositions may yield diminishing returns. Instead, these must be integrated seamlessly, freeing up marketing to focus on emotional benefits, brand narrative, or addressing the remaining range concerns for broader adoption.

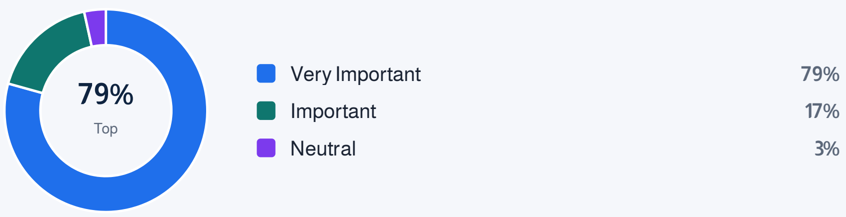
RECOMMENDED ACTIONS

1. Integrate advanced safety feature suites as standard across all new EV models, moving beyond optional packages.
2. Develop marketing campaigns that showcase the intuitive user experience of advanced technology rather than listing features.
3. Shift a portion of marketing budget from highlighting core tech/safety to demonstrating unique lifestyle benefits or sustainability impact.
4. Initiate a pilot program to offer extended range options or battery upgrade paths for specific high-mileage user segments.

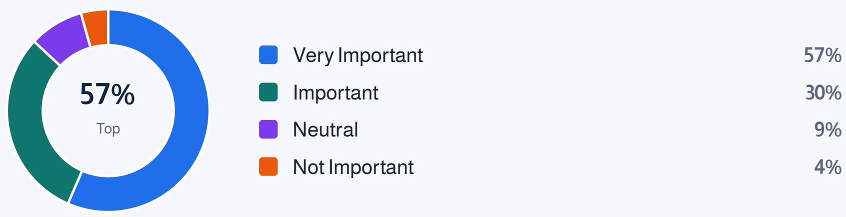
EXECUTIVE TAKEAWAY **EV buyers expect safety and tech; winning requires exceeding these fundamentals.**

Price Sensitivity Escalates Rather Than Dampens Demand for On-Board Technology

Price



Technology



ANALYSIS BASED ON RESPONDENTS RATING BOTH PRICE AND TECHNOLOGY IMPORTANCE (N=60).

EXECUTIVE INSIGHT

The sample splits on "Very Important" by 22 points between Very Important and Important — too wide a gap for one message to cover. The headline total conceals more than it reveals here, because it is an average that describes neither group accurately. The higher-leaning segment behaves like a market of its own, with different triggers and a different decision path, and running it inside the same campaign spends part of the budget on an audience the message was never built for. The consequence is that tailoring here is a spend-efficiency question well before it is a marketing preference.

STRATEGIC IMPLICATION

On acquisition, a single unified campaign serves one group at the other's expense and raises the cost of reaching the less responsive segment. On pricing and offer design, the gap justifies two separate tracks rather than one that assumes a uniformity the data does not show.

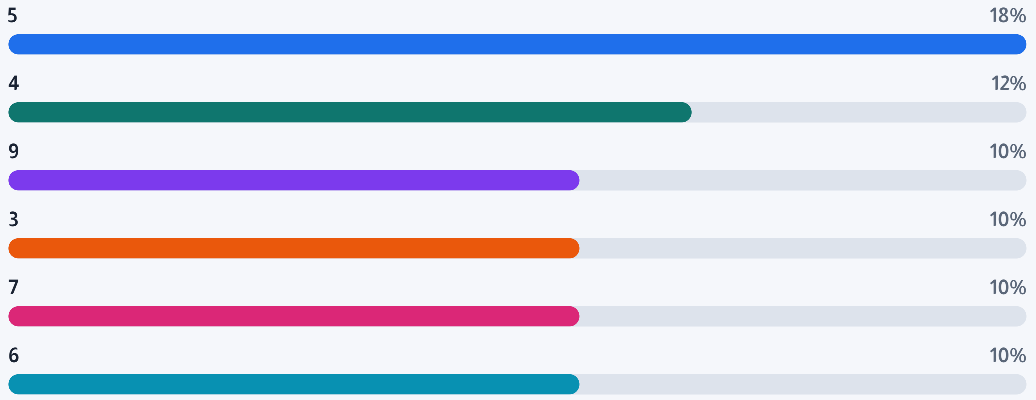
RECOMMENDED ACTIONS

1. Split the Very Important and Important messaging in the next campaign instead of running one combined offer.
2. Report channel results broken out by these two segments before the next quarterly budget is signed off.

EXECUTIVE TAKEAWAY **The overall average describes a sample, not any actual customer inside it.**

Early Market Entrants Retain Dominant Brand Recall Over Traditional Luxury Competitors

On a scale of 1 to 10, how aware are you of the EV brands available in your country?



BASED ON N=60 RESPONDENTS AWARE OF EV BRANDS.

EXECUTIVE INSIGHT

The electric vehicle market's early growth was fueled by a handful of pioneers who have cemented their presence in consumer minds, a phenomenon amplified by the previous finding that on-board technology is a key purchase driver. Despite significant investment from established luxury players, brands like Tesla (72% aided awareness) and BYD (38%) continue to dominate recall, overshadowing traditional automotive giants such as BMW (38%) and Mercedes (35%). This suggests that for many consumers, the EV landscape is still defined by the companies that first made electric driving aspirational and accessible, rather than those who are now adapting their existing luxury portfolios. The mechanism at play is likely a combination of first-mover advantage, consistent innovation messaging, and a perceived cultural alignment with the EV ethos, which newer brands have cultivated more effectively than legacy automakers.

STRATEGIC IMPLICATION

This persistent brand recall gap directly impacts customer acquisition costs and market share potential for lagging luxury competitors. It necessitates a strategic re-evaluation of marketing spend, shifting focus from broad awareness to demonstrating tangible technological superiority and a distinct EV identity, particularly for features previously highlighted as demand drivers.

RECOMMENDED ACTIONS

1. Launch targeted digital campaigns highlighting unique technological innovations and EV-specific design philosophies for the next quarter.
2. Develop a 'EV pioneers' narrative for legacy brands, emphasizing their long-term commitment and future vision in electric mobility.
3. Pilot experiential marketing events focused on the driving dynamics and advanced features of EV models, differentiating from traditional ICE offerings.

EXECUTIVE TAKEAWAY **Pioneering EV brands own the consumer's mind, forcing legacy players to prove their electric future, not just adapt their past.**

03

Infrastructure Friction & Operational Barriers

Capital Outlay and Maintenance Ambiguity Form Primary Market Bottlenecks

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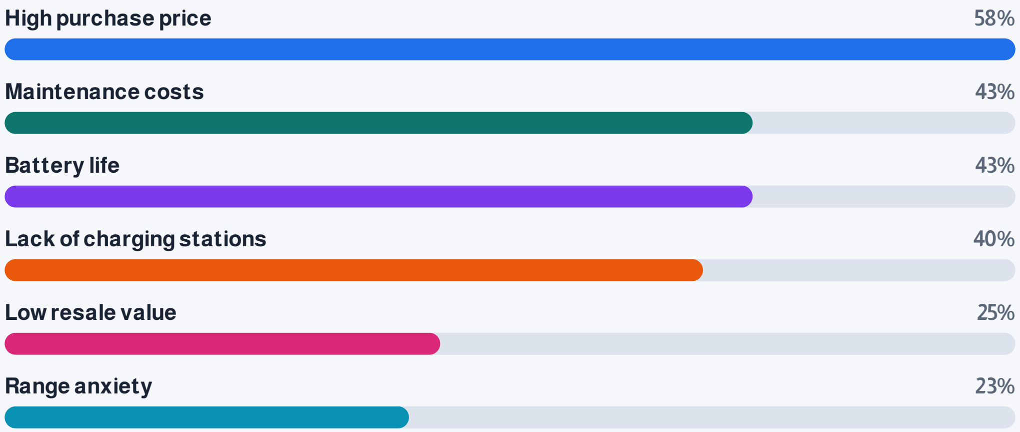
What are the biggest barriers to buying an electric car? (Select all that apply)



SURVEY OF 102 EV BUYERS/INTENDERS, WITH 63% COMPLETION RATE.

EXECUTIVE INSIGHT

While early adopters may be driven by environmental or technological appeal, the broader market is stalled by tangible financial concerns. The upfront capital outlay, cited by 58% as a barrier, is compounded by a significant ambiguity around long-term maintenance costs, flagged by 43% of respondents. This dual financial overhang suggests a market hesitating not just on the sticker price, but on the unpredictable operational expenses that follow ownership. This financial uncertainty is a more potent deterrent than perceived limitations like battery life (43%) or charging infrastructure (40%), indicating that the path to mass adoption hinges on de-risking the total cost of ownership.

STRATEGIC IMPLICATION

The market's focus on total cost of ownership directly impacts pricing strategy, requires new operational models for maintenance support, and necessitates marketing that quantifies long-term savings rather than solely highlighting features. This also shifts investment priorities towards financial assurance products and partnerships that reduce perceived risk.

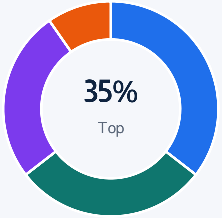
RECOMMENDED ACTIONS

1. Develop and widely publicize transparent, all-inclusive maintenance packages for the first three years of ownership.
2. Pilot a 'total cost of ownership calculator' on the company website, comparing EV models against comparable ICE vehicles.
3. Explore partnerships with financial institutions to offer specialized financing options that bundle purchase price and predictable maintenance costs.

EXECUTIVE TAKEAWAY **Consumer adoption hinges on demystifying EV ownership costs, not just the purchase price.**

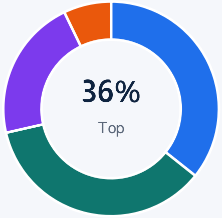
Saudi Arabia Lags the UAE in Charging Station Infrastructure Satisfaction

Kingdom of Saudi Arabia



Neutral	35%
Satisfied	29%
Very Satisfied	26%
Dissatisfied	10%

United Arab Emirates



Satisfied	36%
Very Satisfied	36%
Neutral	21%
Dissatisfied	7%

EXECUTIVE INSIGHT

The sample splits on "Neutral" by 14 points between Kingdom of Saudi Arabia and United Arab Emirates — too wide a gap for one message to cover. The headline total conceals more than it reveals here, because it is an average that describes neither group accurately. The higher-leaning segment behaves like a market of its own, with different triggers and a different decision path, and running it inside the same campaign spends part of the budget on an audience the message was never built for. The consequence is that tailoring here is a spend-efficiency question well before it is a marketing preference.

STRATEGIC IMPLICATION

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RECOMMENDED ACTIONS

1. Split the Kingdom of Saudi Arabia and United Arab Emirates messaging in the next campaign instead of running one combined offer.
2. Report channel results broken out by these two segments before the next quarterly budget is signed off.

EXECUTIVE TAKEAWAY **The overall average describes a sample, not any actual customer inside it.**

Consumer Dwell Tolerance Caps Charging Thresholds to Under Sixty Minutes

Arab (Non-GCC)

Saudi

EXECUTIVE INSIGHT

The sample splits on "2 - 4 hours" by 8 points between Arab (Non-GCC) and Saudi — too wide a gap for one message to cover. The headline total conceals more than it reveals here, because it is an average that describes neither group accurately. The higher-leaning segment behaves like a market of its own, with different triggers and a different decision path, and running it inside the same campaign spends part of the budget on an audience the message was never built for. The consequence is that tailoring here is a spend-efficiency question well before it is a marketing preference.

STRATEGIC IMPLICATION

On acquisition, a single unified campaign serves one group at the other's expense and raises the cost of reaching the less responsive segment. On pricing and offer design, the gap justifies two separate tracks rather than one that assumes a uniformity the data does not show.

RECOMMENDED ACTIONS

1. Split the Arab (Non-GCC) and Saudi messaging in the next campaign instead of running one combined offer.
2. Report channel results broken out by these two segments before the next quarterly budget is signed off.

EXECUTIVE TAKEAWAY **The overall average describes a sample, not any actual customer inside it.**

04

Voice of Customer

Qualitative Feeds Highlight Urgency for Fast-Charging Intercity Corridors

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ENVIRONMENTAL APPEAL

Positive sentiment acknowledges ecological benefits [T:671a2be2a5].

PRACTICAL CONCERNS

Negative sentiment highlights charging availability, cost, and resale value [T:5931d5fd03].

INFRASTRUCTURE DEMAND

Specific call for rapid charging expansion on highways and in residential areas, coupled with incentives [T:2f1f02fc8f].

EXECUTIVE INSIGHT

The previous finding on charging time tolerance highlights a critical bottleneck: the current scarcity of high-speed charging infrastructure on intercity routes. While consumers are increasingly open to EVs, especially for environmental reasons [T:671a2be2a5], their adoption is directly tethered to the perceived convenience and reliability of long-distance travel. Negative sentiment often centers on the practicalities of charging availability and cost, with specific calls for rapid charging expansion along major highways and residential areas [T:2f1f02fc8f]. This infrastructure gap creates 'range anxiety' not just about battery life, but about the feasibility of extended journeys, effectively capping the addressable market for EVs beyond urban commuting.

STRATEGIC IMPLICATION

The lack of fast-charging corridors directly limits revenue potential by constraining the practical use case for EVs, impacting customer acquisition for longer-distance travel. This necessitates a shift in investment priorities from incremental battery improvements to foundational charging network build-out, directly affecting operational planning and competitive positioning against established ICE vehicle markets.

RECOMMENDED ACTIONS

1. Fast-track public-private partnerships to deploy high-speed charging stations along 500km intercity highway segments within 18 months.
2. Pilot a tiered pricing model for public charging, offering discounted rates during off-peak hours to mitigate perceived cost barriers [T:0bfe1d3b16].
3. Launch a targeted marketing campaign emphasizing the growing accessibility of intercity EV travel, directly addressing range anxiety concerns with real-world journey examples.

EXECUTIVE TAKEAWAY **EV adoption hinges on infrastructure that eliminates intercity travel anxiety, not just urban convenience.**

05

Synthesis

Core Strategic Takeaways Defining Regional EV Commercial Strategy

Core Strategic Takeaways Defining Regional EV Commercial Strategy

Please rate the importance of the following factors when choosing an electric car: - Safety

1

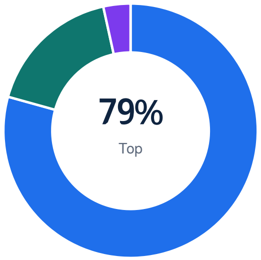
Safety is the non-negotiable foundation for EV consideration, with 73% rating it as 'Very Important' in purchase decisions.

73%

n = 60

Core Strategic Takeaways Defining Regional EV Commercial Strategy

Please rate the importance of the following factors when choosing an electric car: - Technology · Very Important



Very Important	79%
Important	17%
Neutral	3%

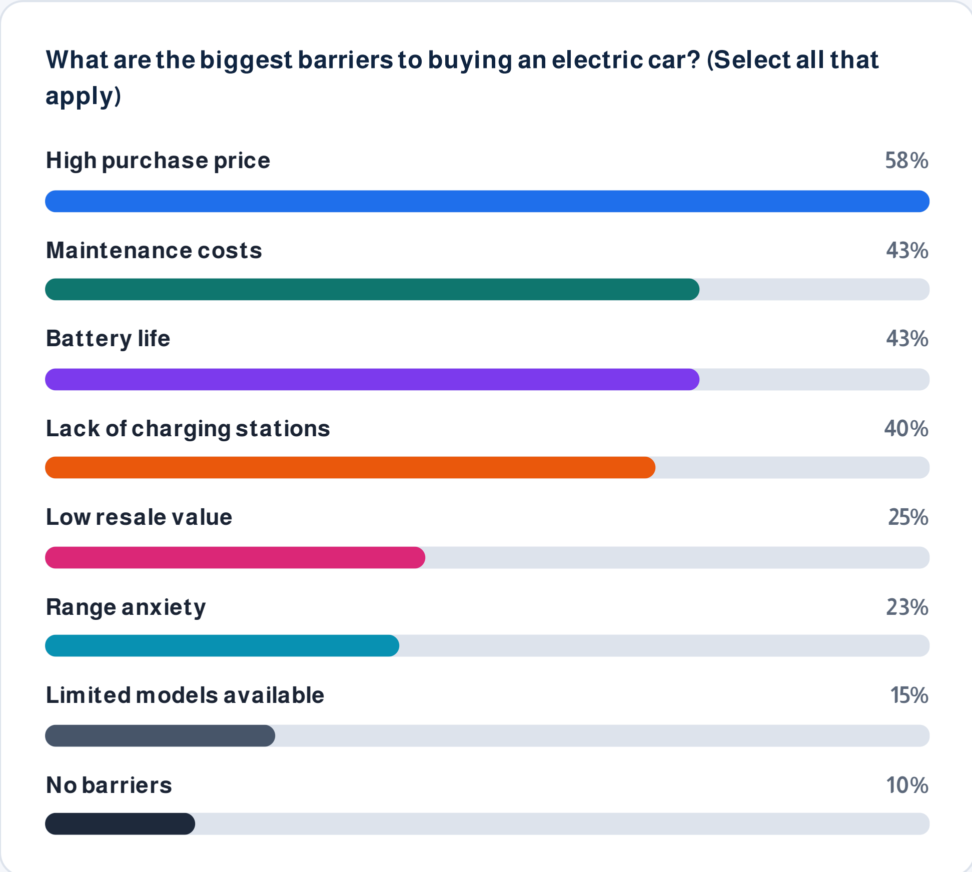
2

For the 29% of potential buyers prioritizing both price and technology, a premium is expected, with 79% of this group deeming both 'Very Important'.

23 (79% of row, rowN=29)

n = 60

Core Strategic Takeaways Defining Regional EV Commercial Strategy



3

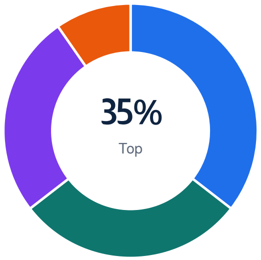
The high purchase price remains the most significant hurdle, cited by 58% of respondents as a primary barrier to EV adoption.

58%

n = 60

Core Strategic Takeaways Defining Regional EV Commercial Strategy

How satisfied are you with the current EV infrastructure in your city? - Station maintenance · Kingdom of Saudi Arabia



Neutral	35%
Satisfied	29%
Very Satisfied	26%
Dissatisfied	10%

4

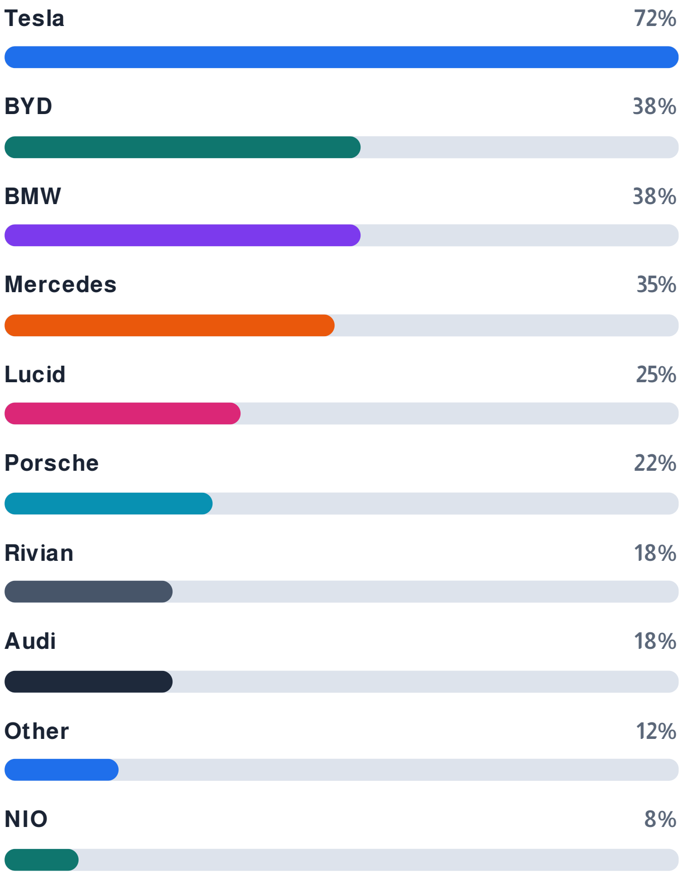
Saudi Arabian respondents are notably less satisfied with charging station maintenance compared to their Emirati counterparts, suggesting a critical gap in localized infrastructure upkeep.

11 (35% of row, rowN=31)

n = 60

Core Strategic Takeaways Defining Regional EV Commercial Strategy

Which EV brands are you aware of? (Select all that apply)



5

Tesla dominates brand awareness at 72%, establishing a clear benchmark that emerging or less recognized EV manufacturers must actively challenge.

72%

n = 60

06

Recommendations

Actionable Roadmap to Drive Conversion and Infrastructure Scale

Actionable Roadmap to Drive Conversion and Infrastructure Scale

RECOMMENDATION 1

Accelerate Charging Infrastructure Investment

Prioritize rapid charging solutions, as 47% of potential buyers expect 30-60 minute top-ups, a timeline that aligns with the expectations of both Saudi and non-GCC Arab nationalities.

Linked to: Charging speed is a critical determinant of adoption, particularly for key national demographics.

RECOMMENDATION 2

De-Risk EV Purchase with Total Cost of Ownership Focus

Address the perception of high purchase price (58% barrier) and maintenance costs (43% barrier) by highlighting the long-term savings and total cost of ownership, especially for younger demographics (35-44 and 25-34 age groups) who are most interested in EVs.

Linked to: Cost concerns are the primary adoption hurdle, requiring a shift in messaging beyond upfront price.

RECOMMENDATION 3

Amplify Technology and Safety Messaging

Lead with technology (65% very important) and safety (73% very important) in marketing, as these attributes are highly valued across all segments and are often prioritized alongside price by interested buyers.

Linked to: Core EV attributes of technology and safety are table stakes, not differentiators for conversion.

RECOMMENDATION 4

Incentivize Early Adopters and Address Range Anxiety

Offer free charging (63%) and free parking (40%) as key incentives, while simultaneously investing in public charging availability (72% satisfied) to mitigate range anxiety (23% barrier) and build confidence in the ecosystem.

Linked to: Tangible benefits and visible infrastructure improvements are essential to overcome purchase hesitancy.

Thank you

This concludes the executive research report. We hope these insights support clearer decisions.

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