

Z E T A

# ELECTRIC VEHICLE PERCEPTION INDEX

PUBLIC OPINION RESEARCH RESULTS  
FEBRUARY 2022

*N = 1000 Likely Voters who own/lease a vehicle  
M.o.E = +/-3.1%  
2-14-22 to 2-22-22*



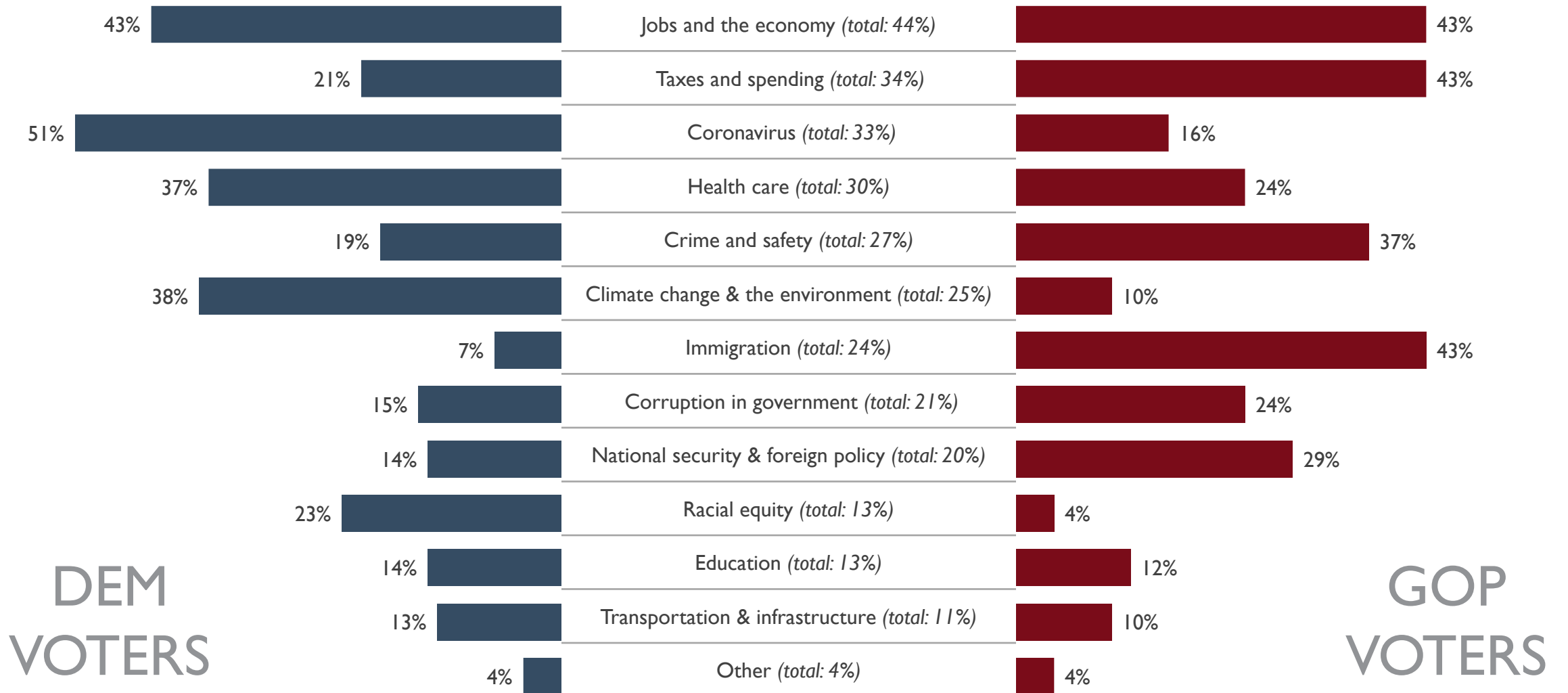
# VOTER PERCEPTIONS

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# VOTER PRIORITIES:

Political ideology has a significant impact on which issues voters care about most.

Over the next two years, which of the following issues do you think is most important for the President & Congress to address? (Top 3 choices combined)

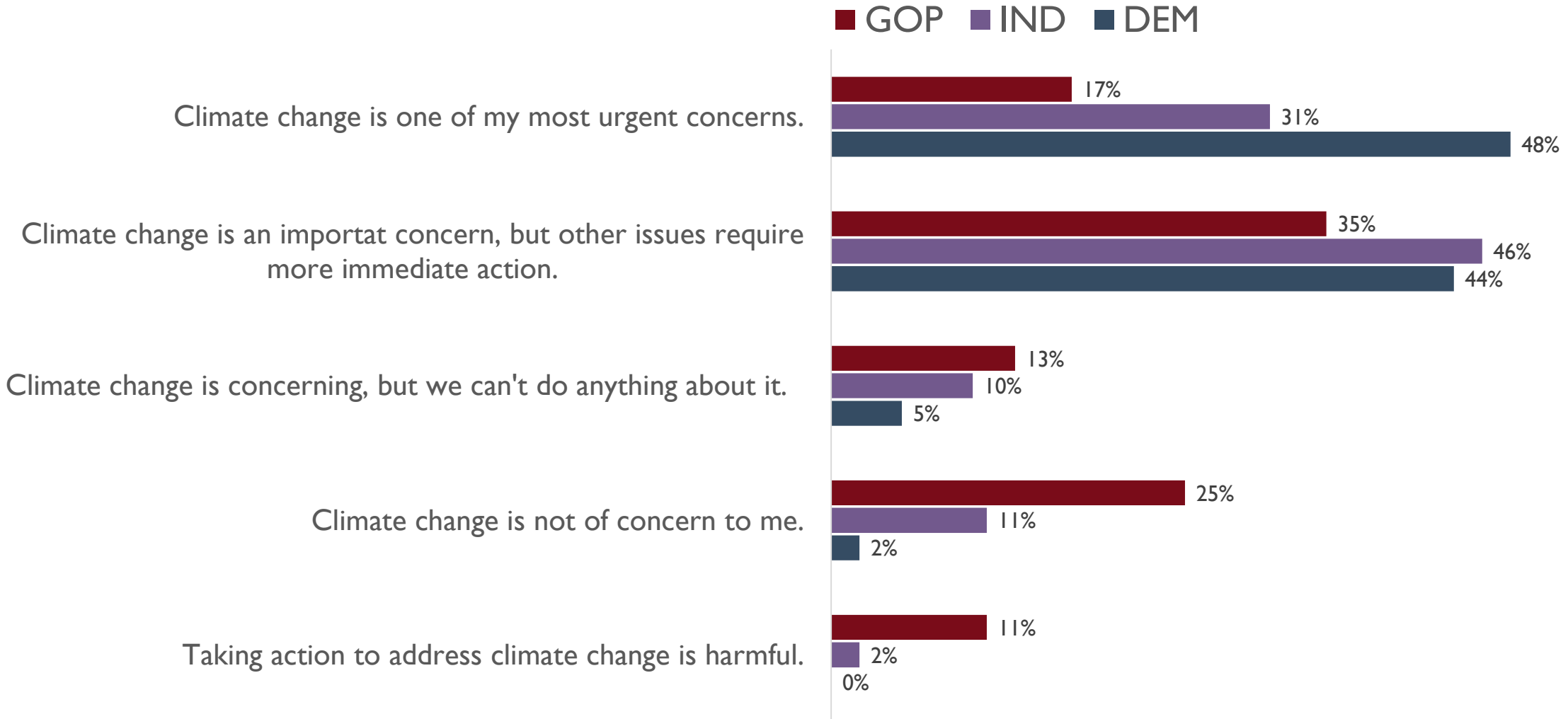




# CLIMATE CHANGE REMAINS INCREDIBLY POLARIZING:

Nearly half of Dems list it as one of their most urgent concerns. A quarter of Republicans say it's of no concern.

Which of the following statements regarding the environment and climate change comes CLOSEST to your opinion?

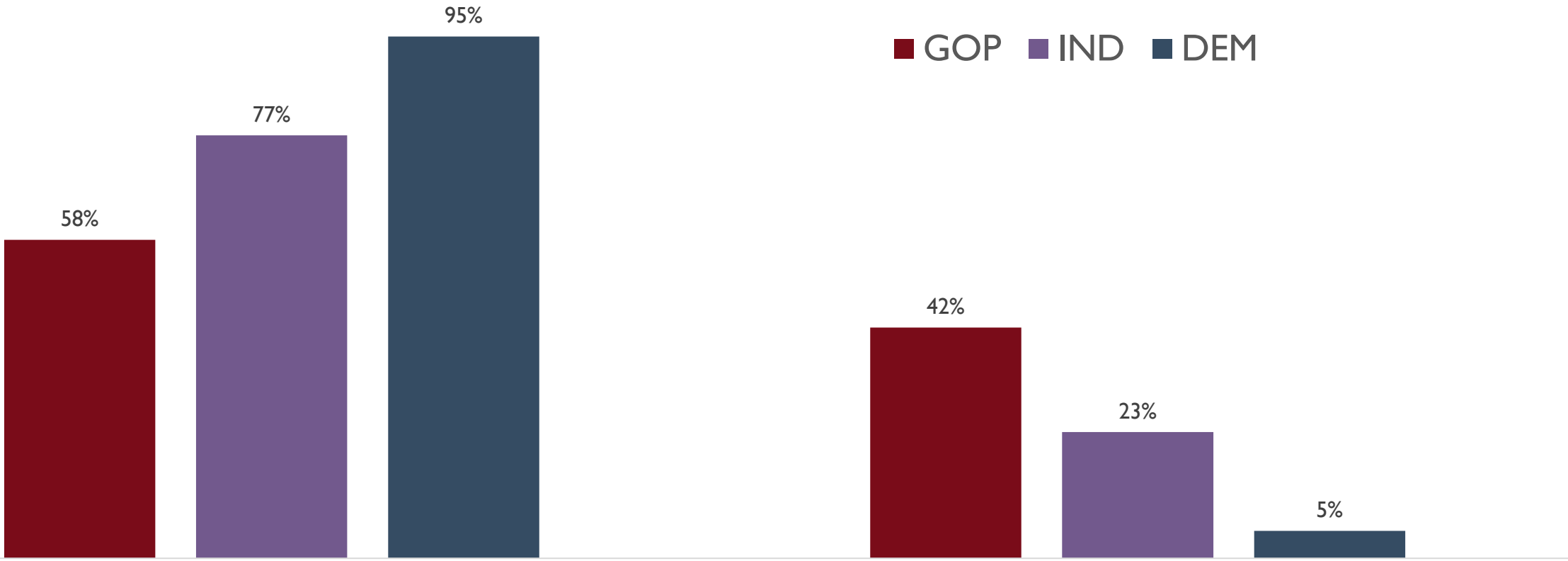




# ECONOMIC GROWTH & CLIMATE SOLUTIONS AREN'T AT ODDS.

Three-quarters (including a 58% of GOP voters) believe we CAN address climate change AND grow our economy simultaneously.

Which statement do you agree with more?



We CAN address climate change and grow our economy at the same time by passing policies that create jobs and promote clean energy and clean cars.

We CANNOT address climate change and grow our economy at the same time by passing policies that create jobs and promote clean energy and clean cars.

# VOTERS SEE VALUE IN ALL TYPES OF INFRASTRUCTURE SPENDING.

Republicans are more hesitant to see value in electric infrastructure or supporting the emerging EV sector.

Each of the following are potential investments that our country may make in the relatively near future.

Please indicate whether you think it will have a positive or negative impact on [The economy / the environment / public health]

(Showing net positive – net negative score. The higher the score, the more perceived positive impact)

		Total	GOP	IND	DEM
<b>Infrastructure:</b> <i>Repairing and maintaining American roads, bridges and highways</i>	Impact on the ECONOMY	77	76	71	80
	Impact on the ENVIRONMENT	69	69	63	75
	Impact on PUBLIC HEALTH	66	60	64	73
<b>Electric Infrastructure:</b> <i>Developing and installing electric vehicle charging stations and modifying the electrical grid.</i>	Impact on the ECONOMY	58	27	61	87
	Impact on the ENVIRONMENT	59	31	67	82
	Impact on PUBLIC HEALTH	54	32	54	75
<b>Auto Industry:</b> <i>Supporting the emerging electric vehicle sector by investing in materials, parts, and technology.</i>	Impact on the ECONOMY	52	28	54	77
	Impact on the ENVIRONMENT	56	34	60	75
	Impact on PUBLIC HEALTH	52	33	56	66
<b>Public Transit:</b> <i>Increase access to low-cost, high-quality, zero-emission public transportation options for all.</i>	Impact on the ECONOMY	60	46	55	79
	Impact on the ENVIRONMENT	65	49	70	79
	Impact on PUBLIC HEALTH	59	41	62	74

# PERCEPTIONS OF EVs

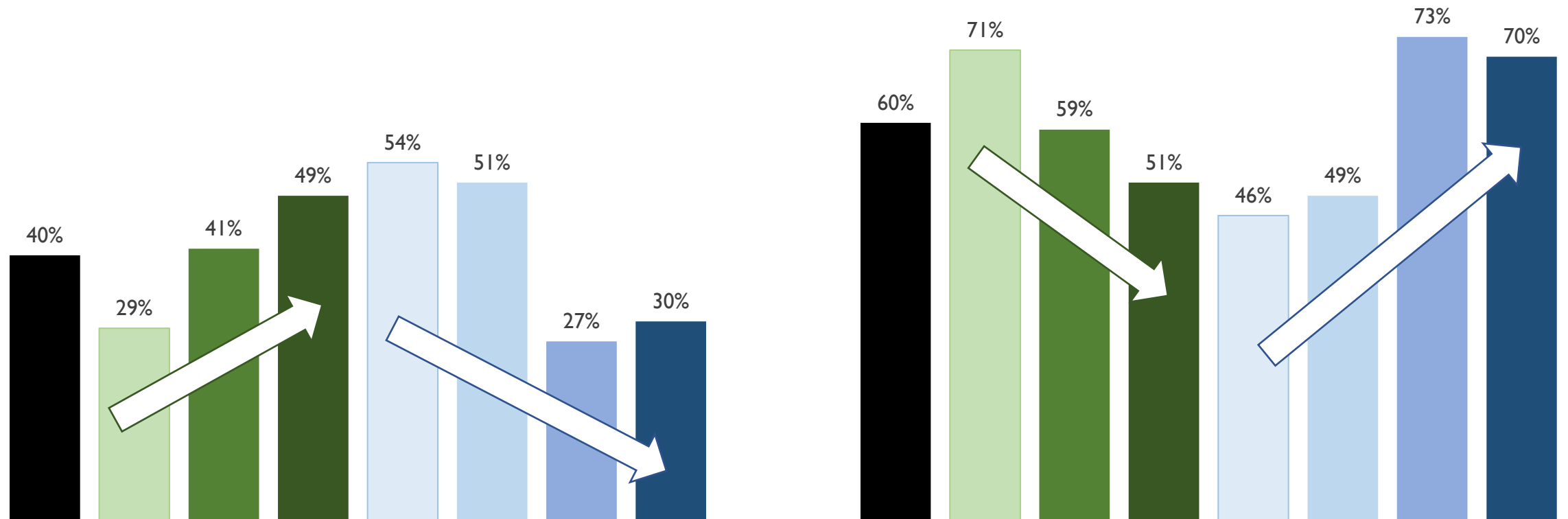
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# EV KNOWLEDGE DECREASES WITH AGE AND RISES WITH INCOME.

Younger, affluent consumers self-identify knowing more about EVs.

Which of the following best describes your knowledge level regarding electric vehicles?

■ TOTAL   ■ <\$50K HHI   ■ \$50-100K HHI   ■ >\$100K HHI   ■ 18-34   ■ 35-44   ■ 45-64   ■ 65+



Consider myself an expert or follow electric vehicles closely in the news / read about them.

I know what electric vehicles are but don't know the specifics or have never heard of them before.

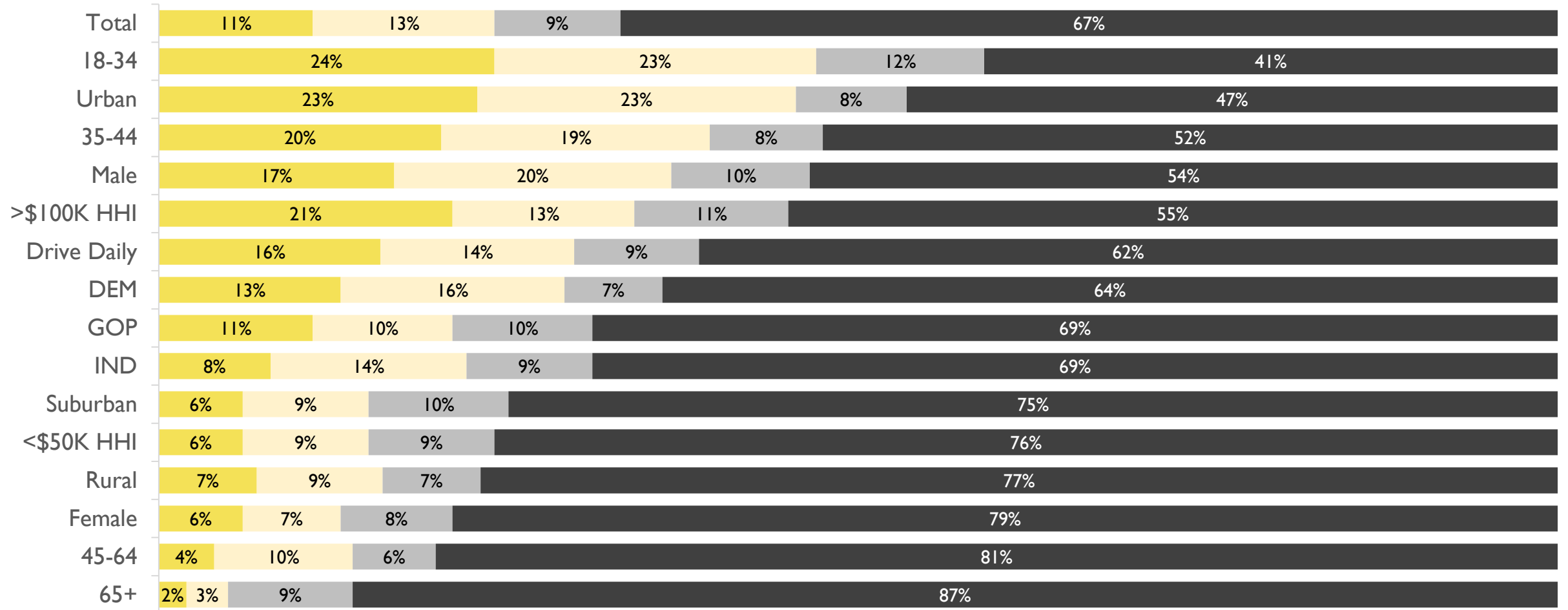


# TWO-THIRDS HAVE NEVER DRIVEN AN EV BEFORE.

Younger, urban, affluent males are much more likely to have driven an EV before. Political affiliation plays less of a role.

Have you driven an electric vehicle before?

■ Yes, many times    ■ Yes, a few times    ■ Yes, only once    ■ No

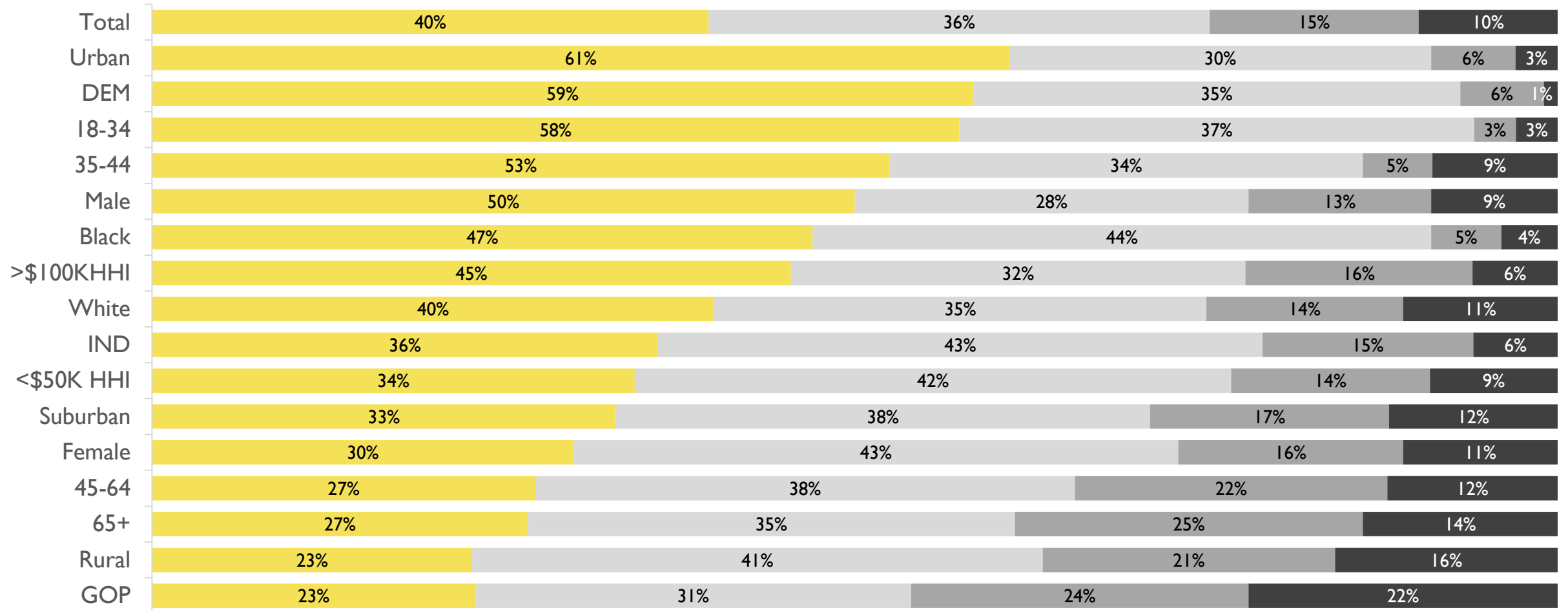


# A NOTICABLE JUMP IN EV REPUTATION INTENSITY

Previous polling measured total “very positive” ratings at about 27%. Most of the lift comes from younger, urban Dems

Do you have a positive or negative opinion of electric vehicles?

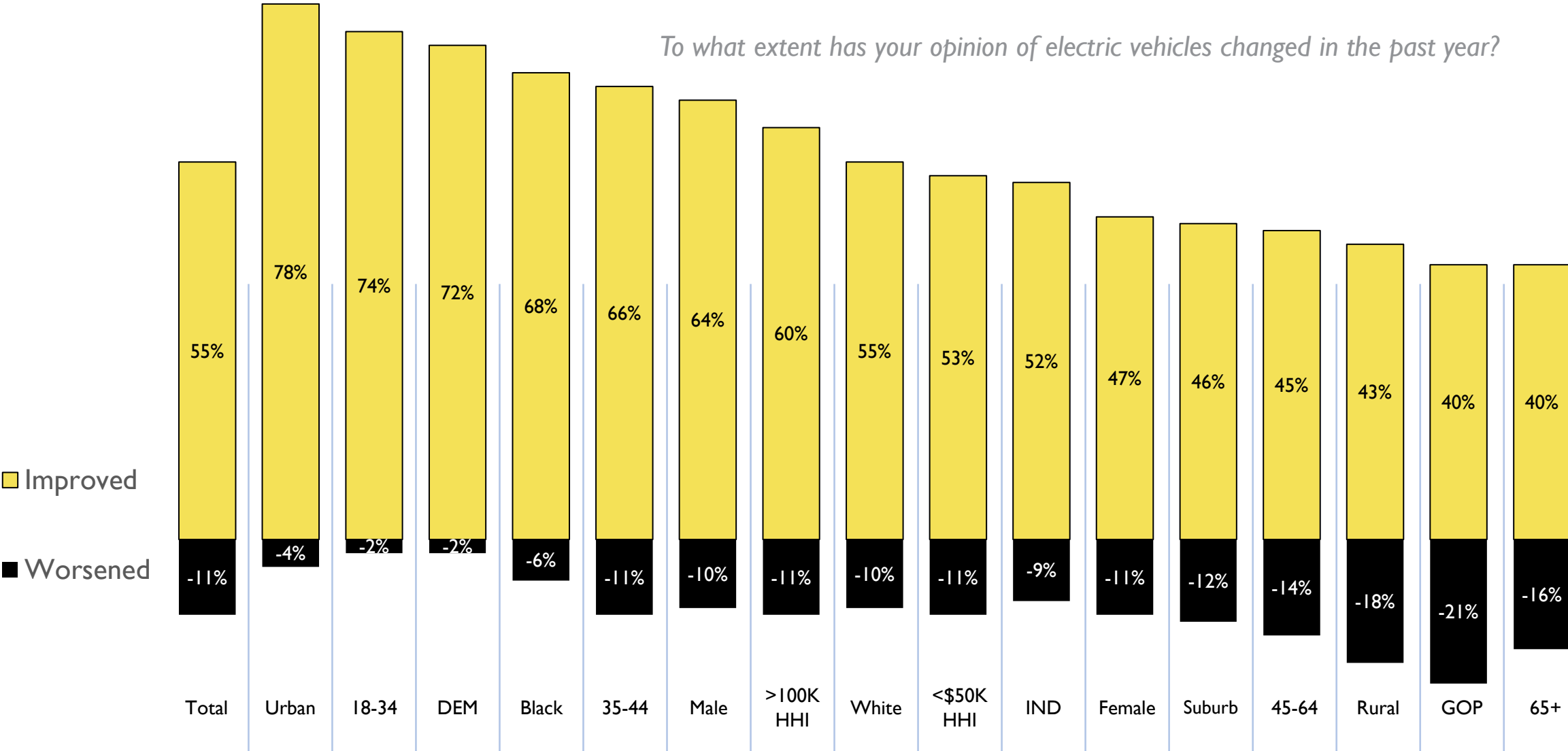
Very Positive    Somewhat Positive    Somewhat Negative    Very Negative



# BIG REPUTATIONAL LIFTS WITH YOUNG, URBAN, DEMS

Reputational lifts may coincide with increased consumer marketing efforts.

To what extent has your opinion of electric vehicles changed in the past year?



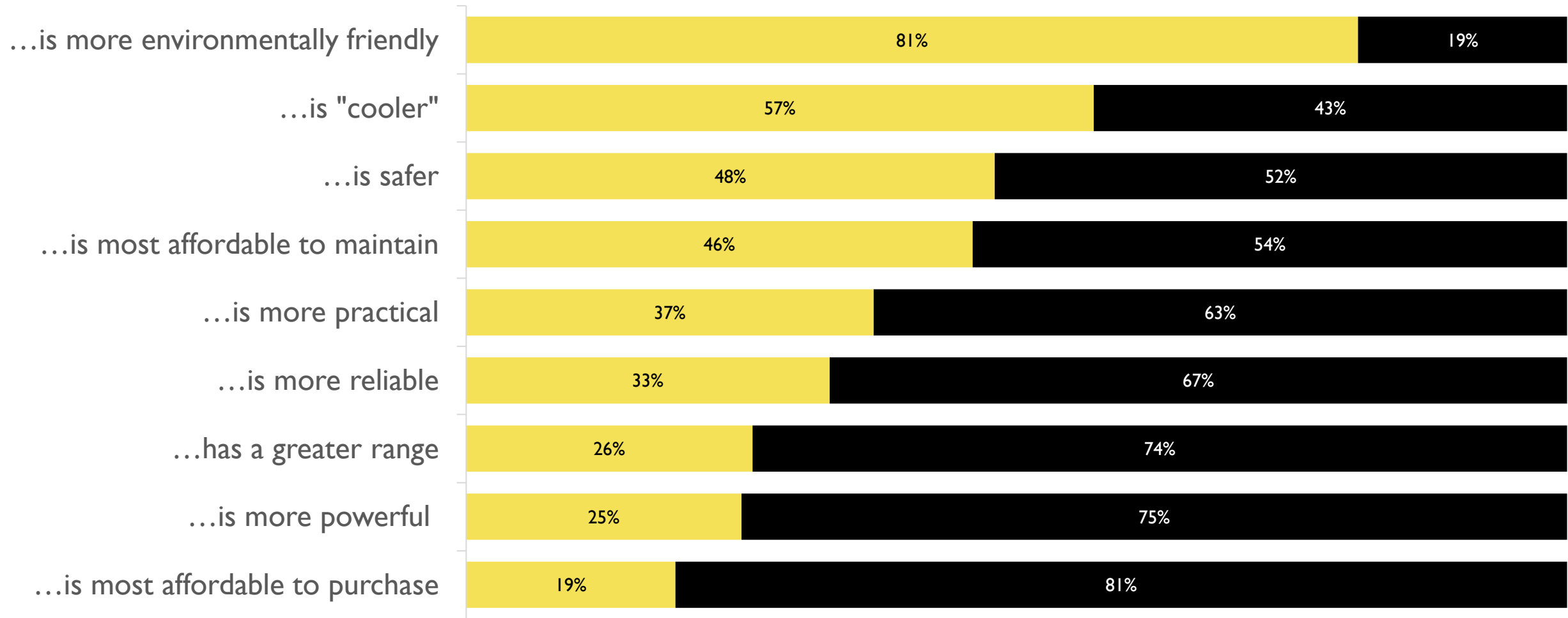
# EV's ARE OFFICIALLY "COOL."

*But there is still a long way to go to overcome gas-powered vehicles on other metrics.*

*Which type of vehicle do you think ... (total responses shown below)*

■ Electric Vehicles

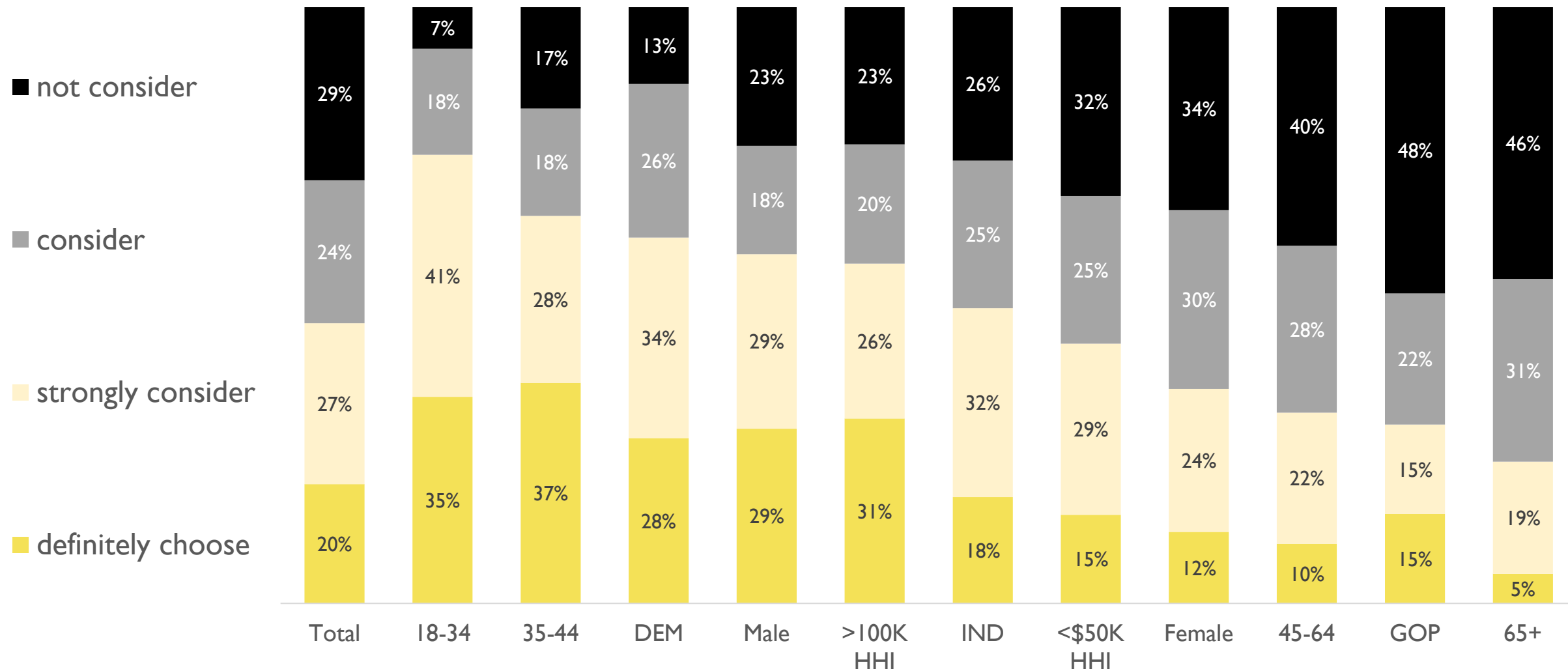
■ Gas-powered Vehicles



# AGE IS MOST DETERMINING FACTOR IN POTENTIAL PURCHASING

Political party affiliation and gender also have deeply affective roles in forecasting potential purchases of EVs.

“I will \_\_\_\_\_ an electric vehicle for my next purchase or lease”

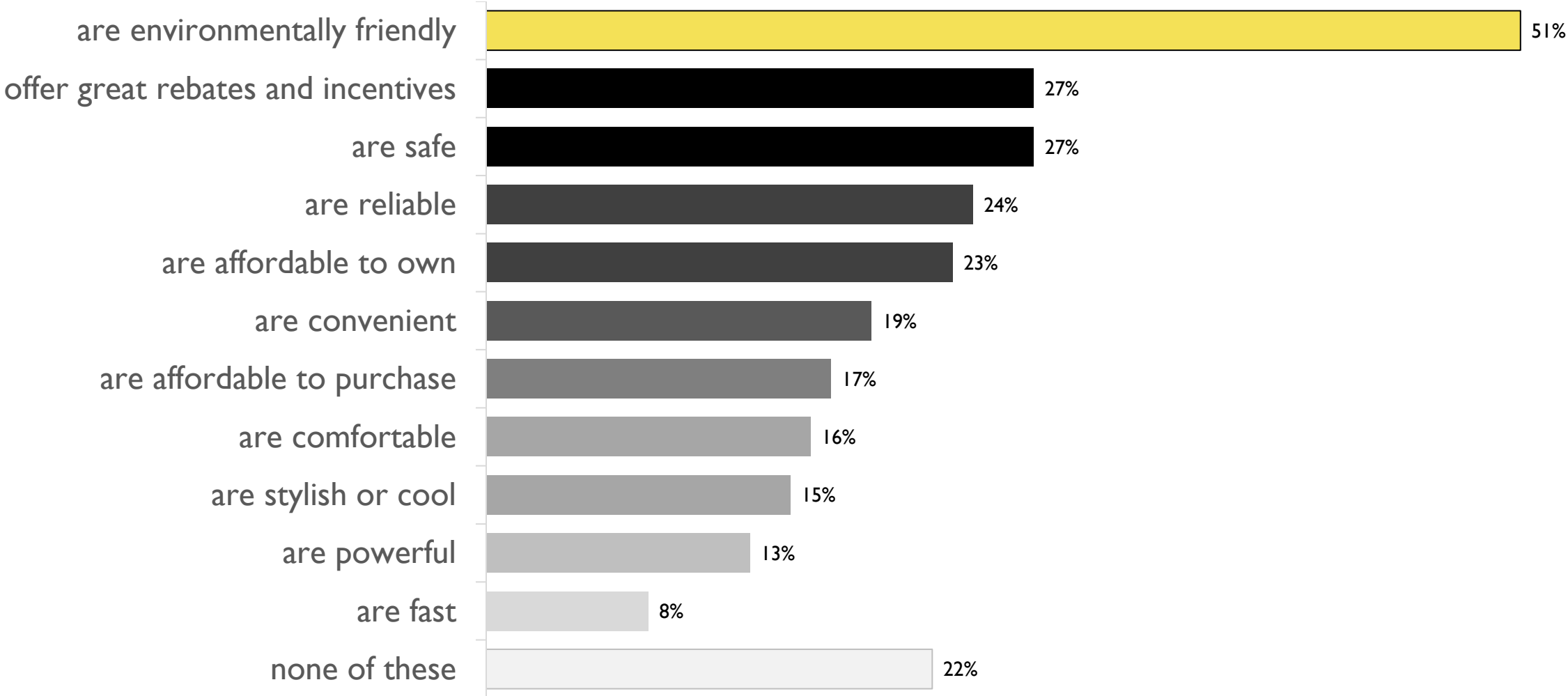




# TOP PURCHASING FACTOR: ENVIRONMENTAL FRIENDLINESS

*It's much less about EVs being fast, powerful, or cool.*

*Why might you choose to purchase or lease an electric vehicle over a gas-powered vehicle?  
Because electric vehicles \_\_\_\_\_.* (top three choices combined)

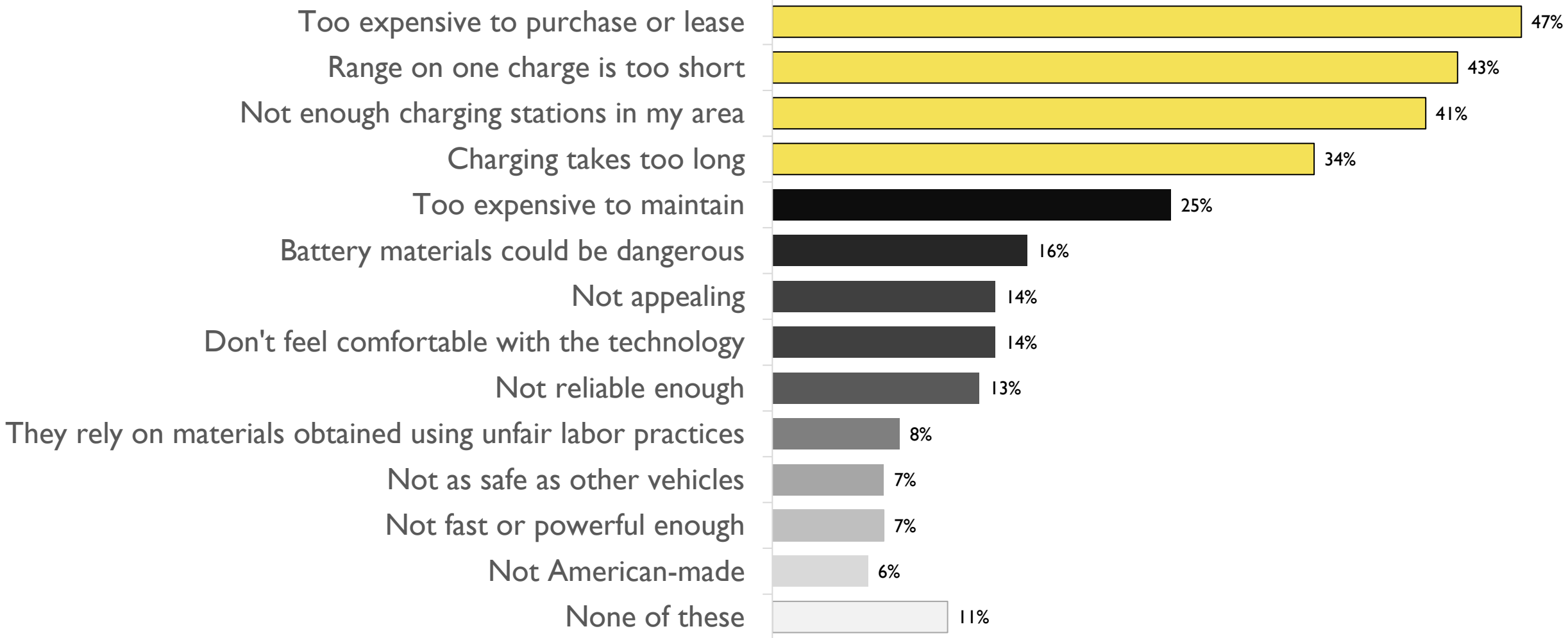




# TOP PURCHASING ROADBLOCKS:

*Purchasing cost... range... charging convenience & logistics.*

*Which of the following give you the most hesitation about purchasing or leasing an electric vehicle? (top three choices combined)*

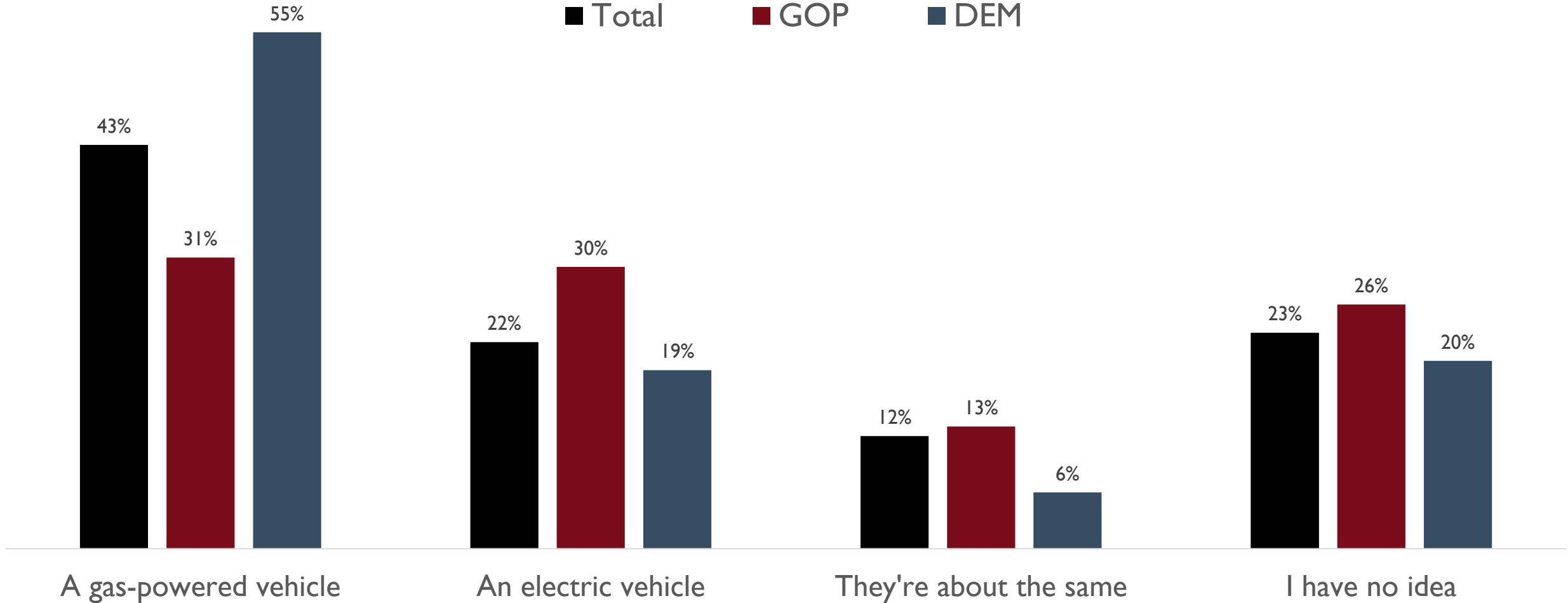


# COST: A KNOWLEDGE GAP BASED ON IDEOLOGY.

Democrats are nearly twice as likely as Republicans to believe a gas-powered vehicle costs more to drive per mile.

Which do you think costs more to drive per mile?

■ Total ■ GOP ■ DEM

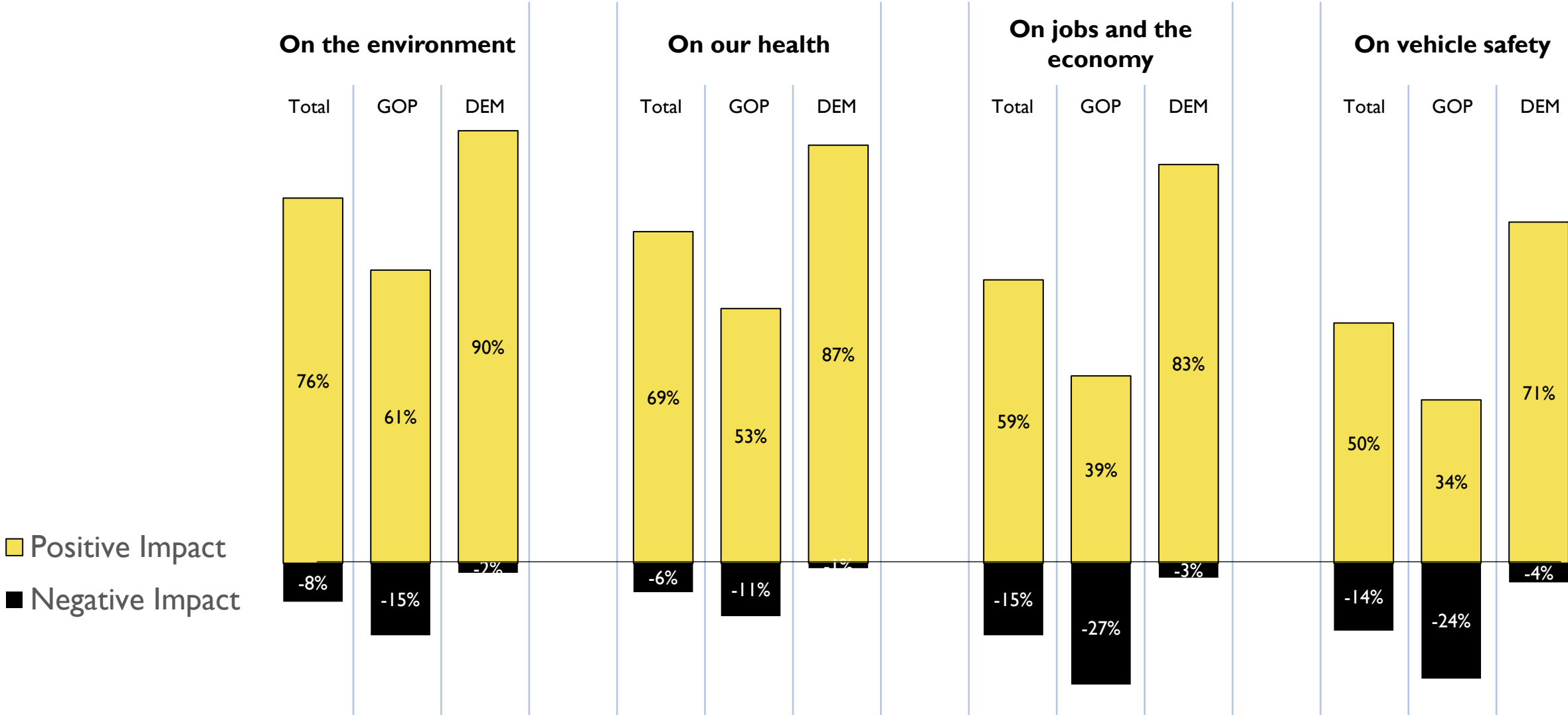




# EV ADOPTION BENEFITS ENVIRONMENT THE MOST

Voters are less likely to immediately recognize the benefits to safety or to jobs and the economy.

*If electric vehicle adoption increased, do you think it would have a positive or negative impact on....*



# POLICY PERCEPTIONS

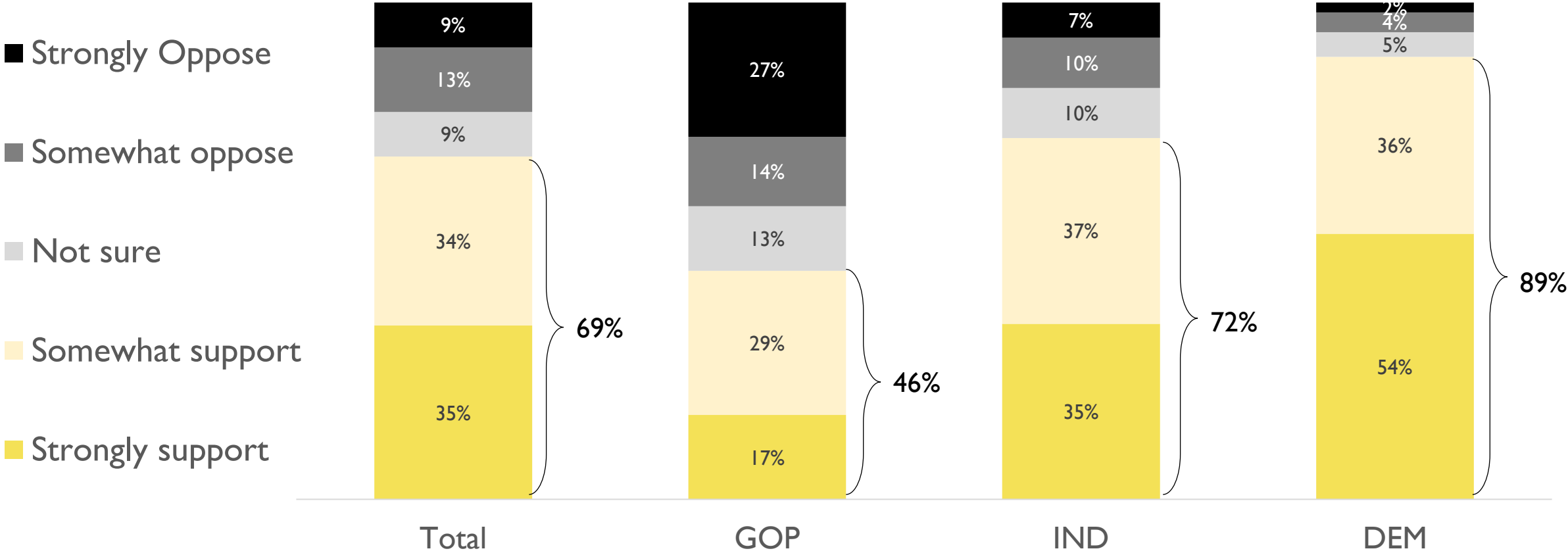
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# MOST SUPPORT INVESTMENT FOR EV CHARGING NETWORK

Republican voters are the most cautious group when it comes to this type of infrastructure.

Would you support or oppose federal, state and local investment to **expand the network of chargers for electric vehicles?**

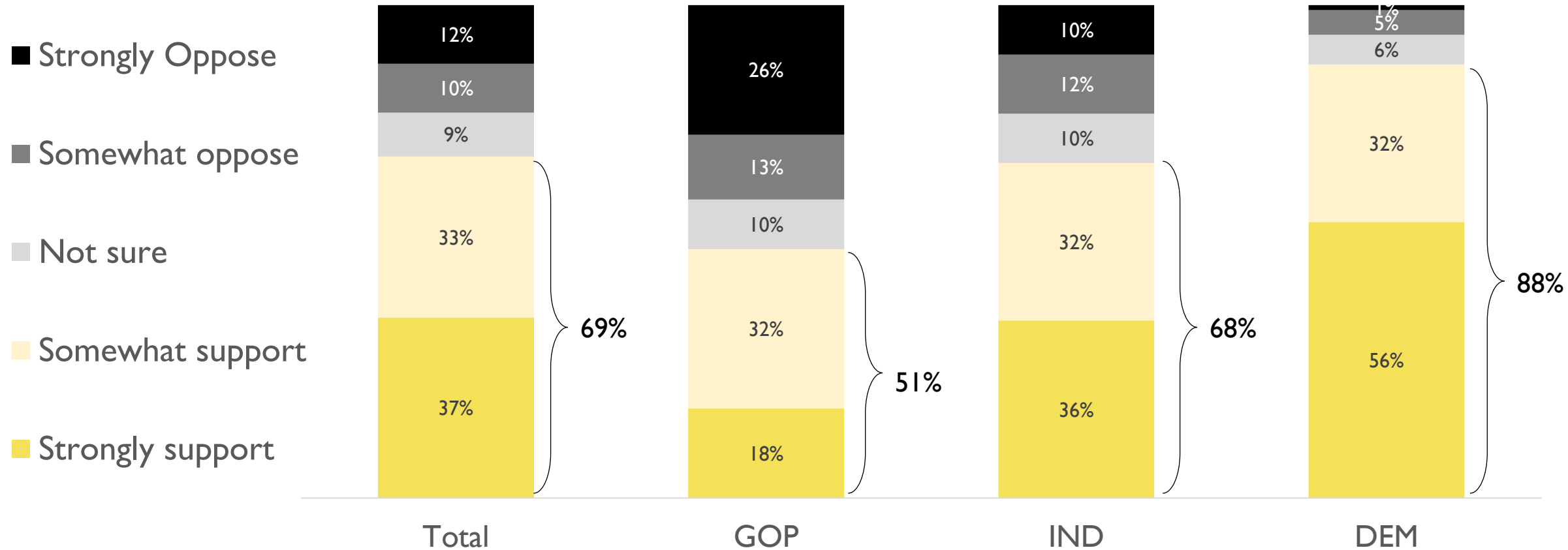


# SUPPORT FOR TRANSITIONING PUBLIC TRANSIT VEHICLES

While the most skeptical group, Republican voters are more receptive to this than to building EV charging infrastructure.

Would you support or oppose federal, state and local investment for

**transitioning public transportation vehicles from gas-powered vehicles to electric vehicles?**

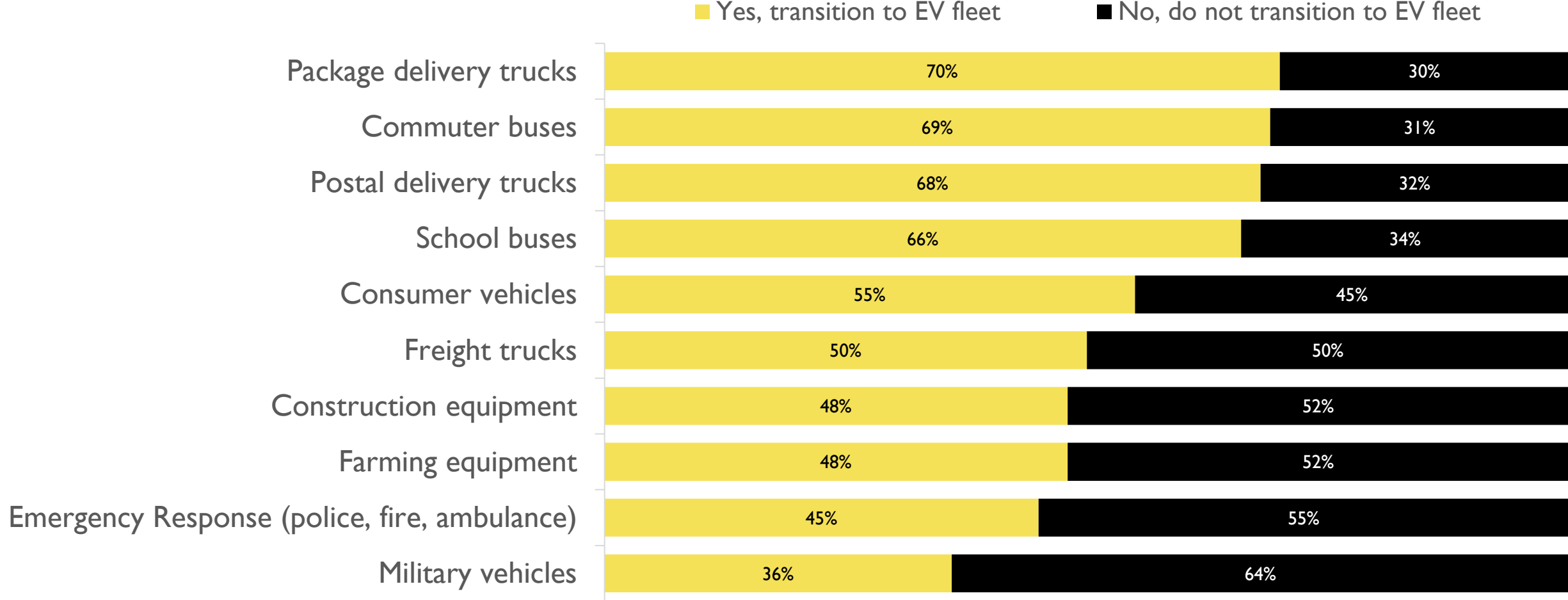




# TIME TO TRANSITION PUBLIC TRANSPORTATION & DELIVERY VEHICLES.

*They're less likely to want to transition emergency or military vehicles.*

*For each of the following vehicle types, please indicate whether you would support transitioning the current fleet from gas-powered to electric-powered vehicles.*



# POLICY SUMMARY:

	Support or oppose this policy?			Positive or negative impact on jobs & economy?			Positive or negative impact on environment and climate change?		
	Support	Oppose	NET	Positive Impact	Negative impact	NET	Positive impact	Negative impact	NET
Provide incentives that would reduce the consumer price of electric vehicles.	79%	14%	65%	67%	11%	56%	71%	7%	64%
Provide incentives for the electrification of larger vehicles like trucks, freight trucks and school buses.	69%	24%	45%	63%	14%	49%	75%	8%	67%
Create federal policies to encourage domestic manufacturing of electric vehicles	73%	19%	54%	70%	12%	58%	69%	8%	61%
Invest in research and development to help drive down the cost and increase the range of electric vehicles.	78%	16%	62%	69%	9%	60%	72%	7%	65%
Provide incentives for businesses to install electric vehicle chargers on their property.	73%	19%	54%	61%	12%	49%	69%	8%	61%

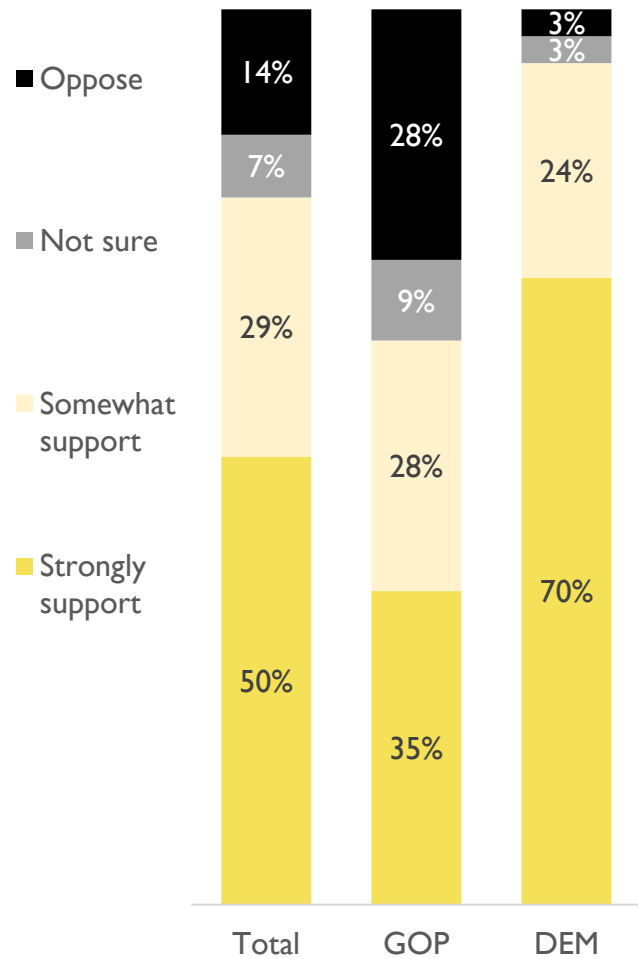
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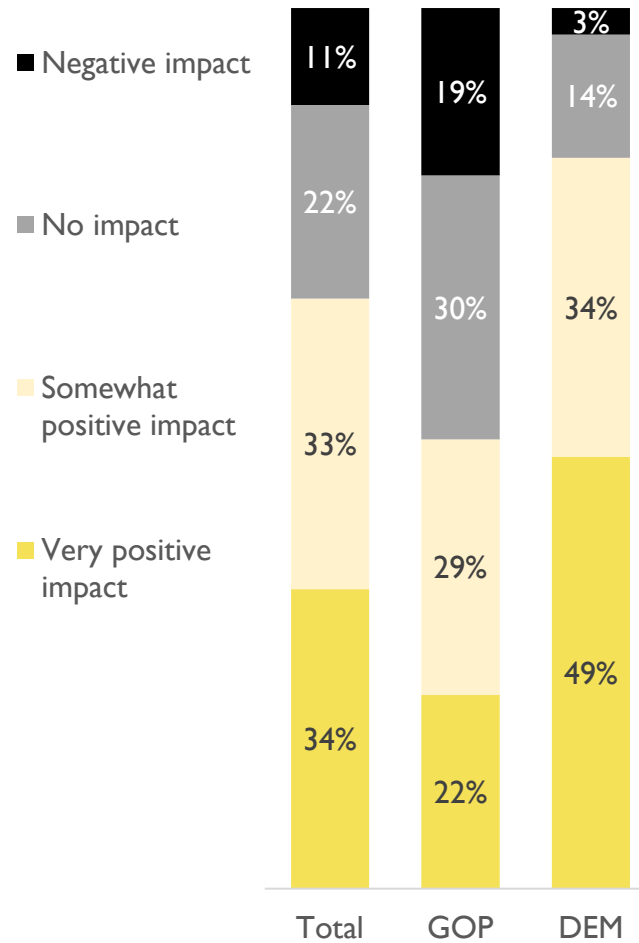
# POLICY FOCUS:

Provide incentives that would reduce the consumer price of electric vehicles.

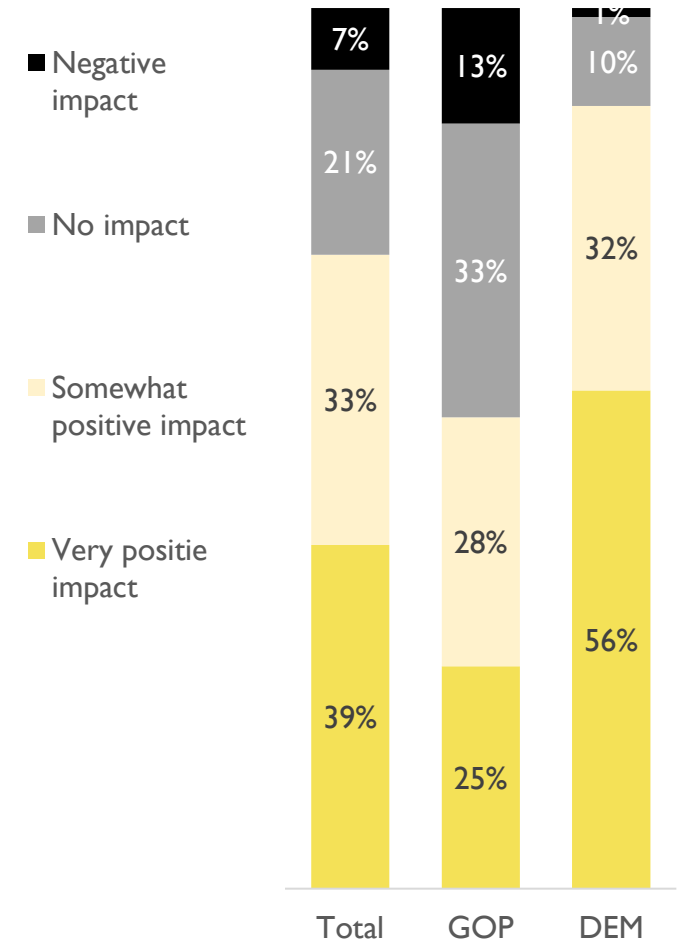
### Do you support or oppose this policy?



### Will this policy have a positive or negative impact on jobs and the economy?



### Will this policy have a positive or negative impact on the environment and climate change?

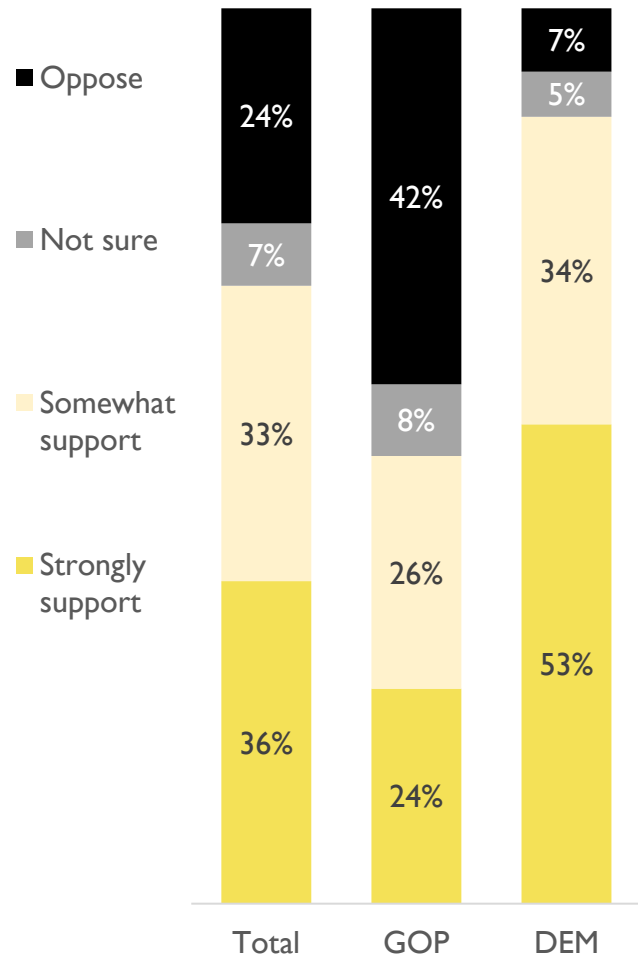




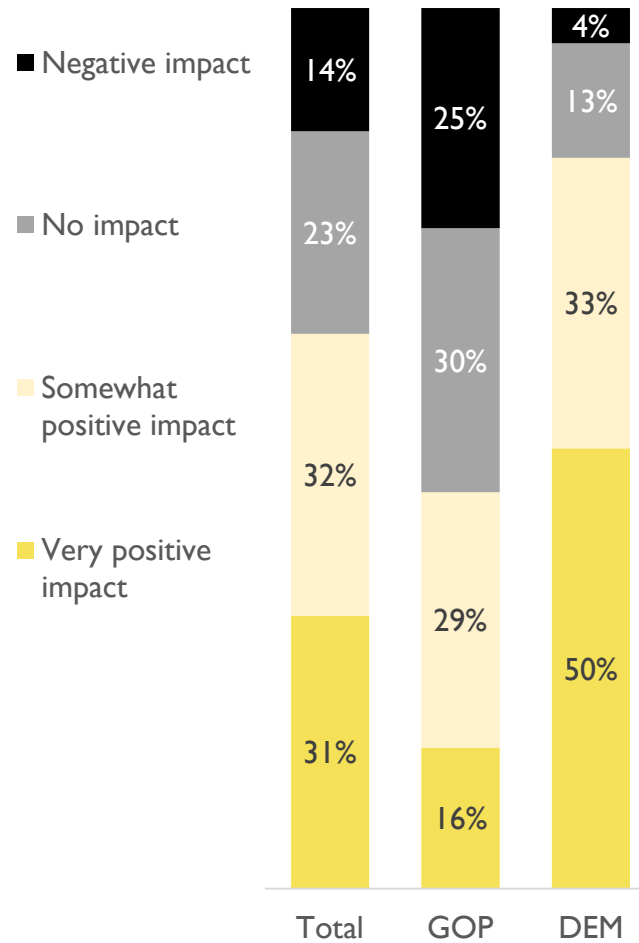
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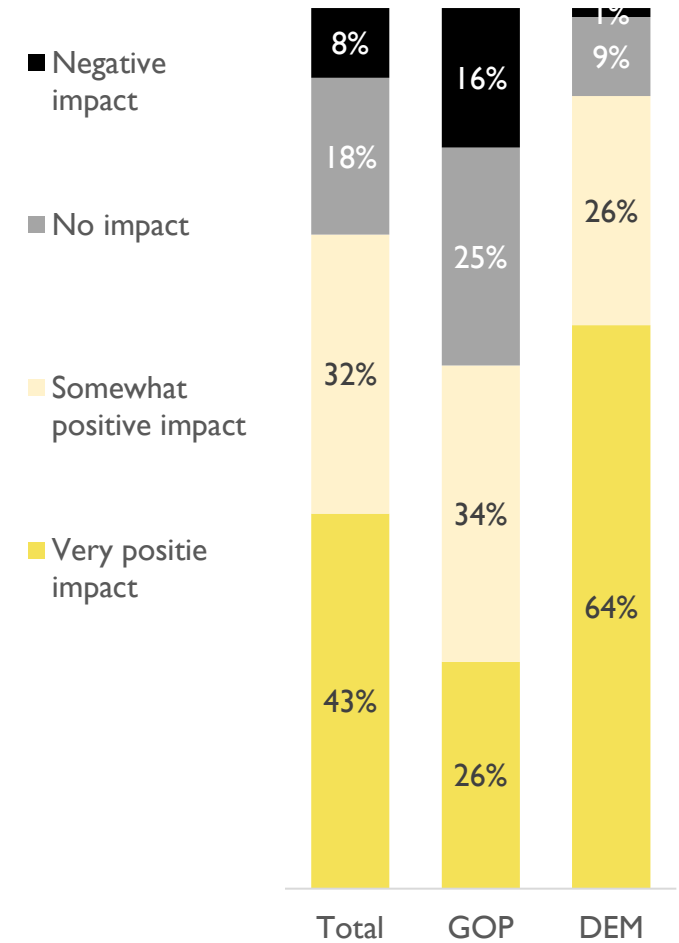
### Do you support or oppose this policy?



### Will this policy have a positive or negative impact on jobs and the economy?



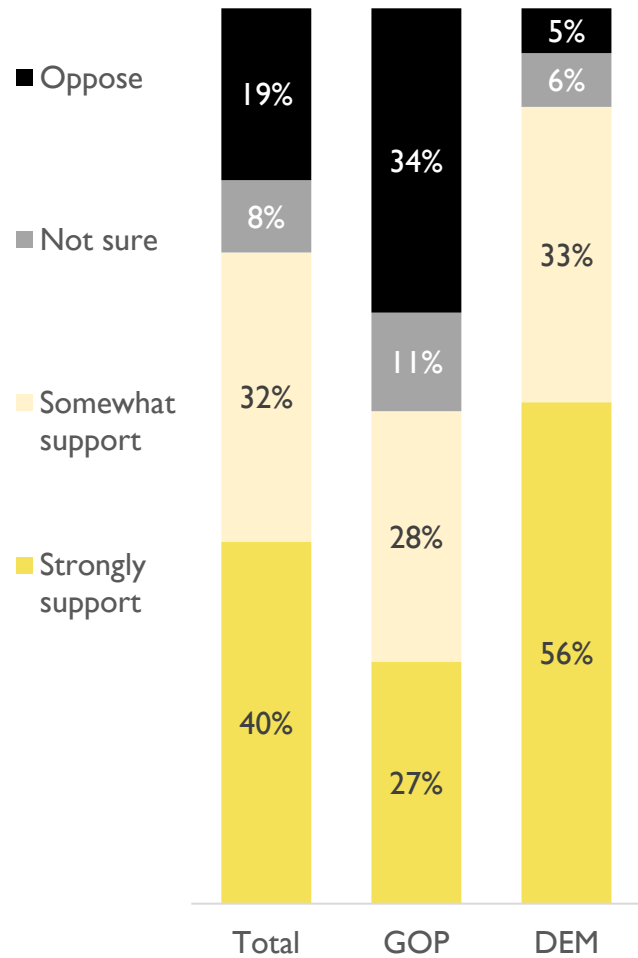
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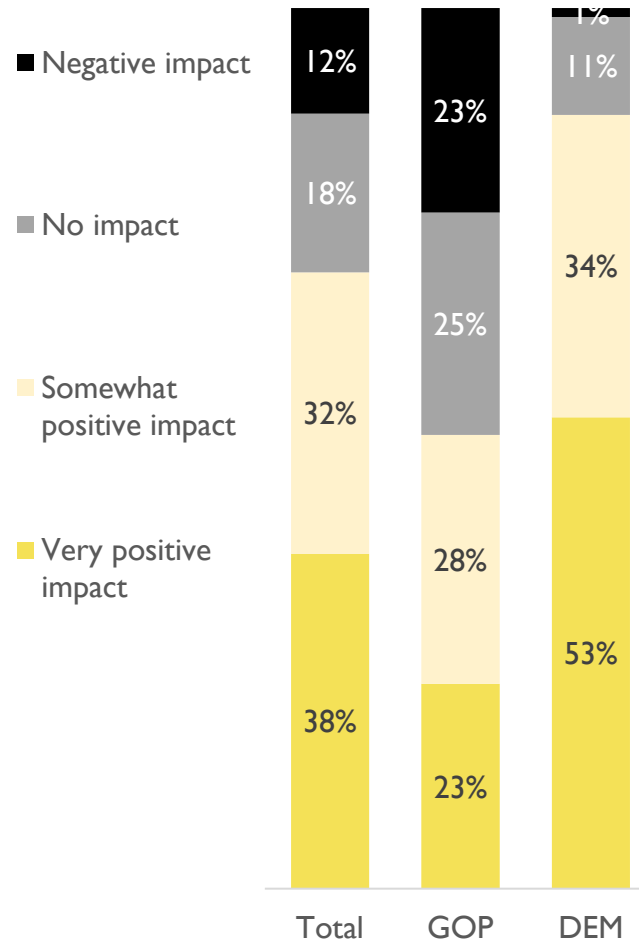
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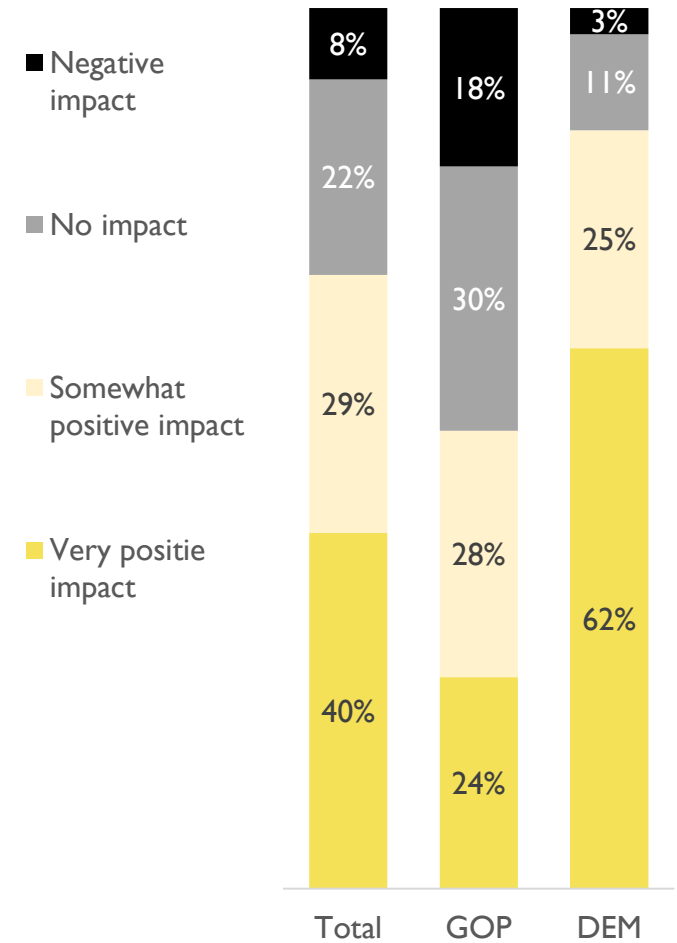
### Do you support or oppose this policy?



### Will this policy have a positive or negative impact on jobs and the economy?



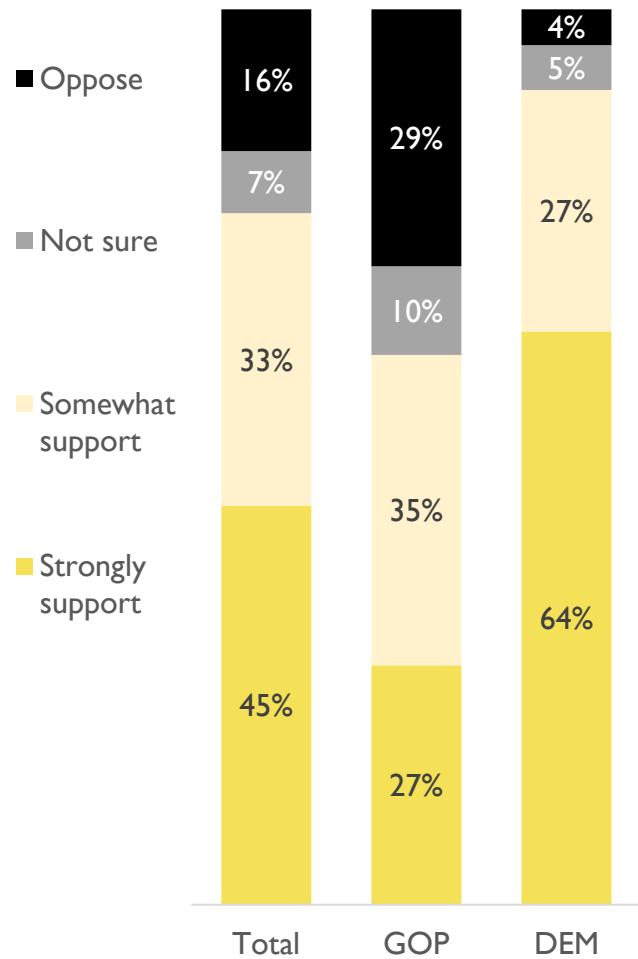
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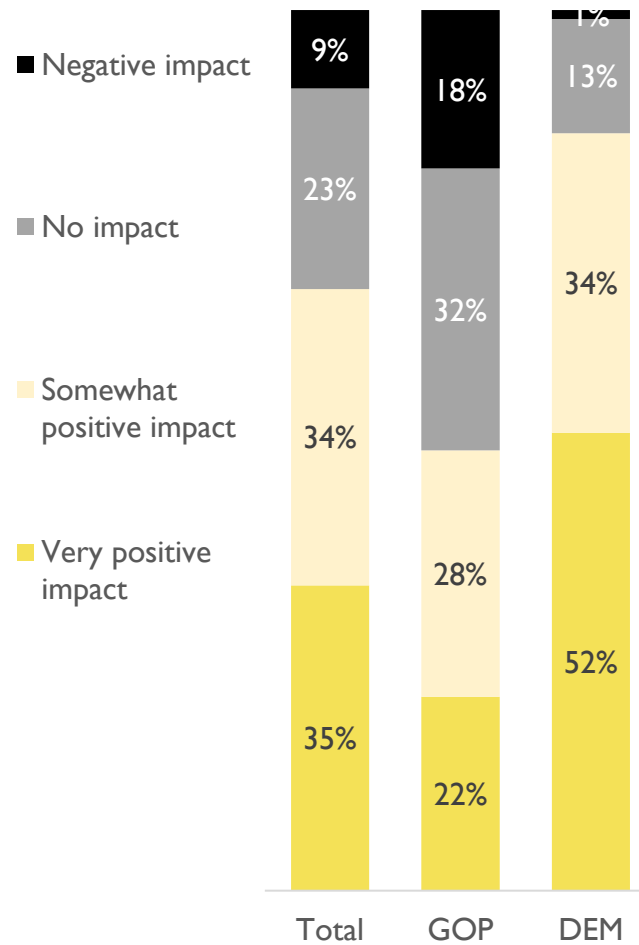
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*Invest in research and development to help drive down the cost and increase the range of electric vehicles.*

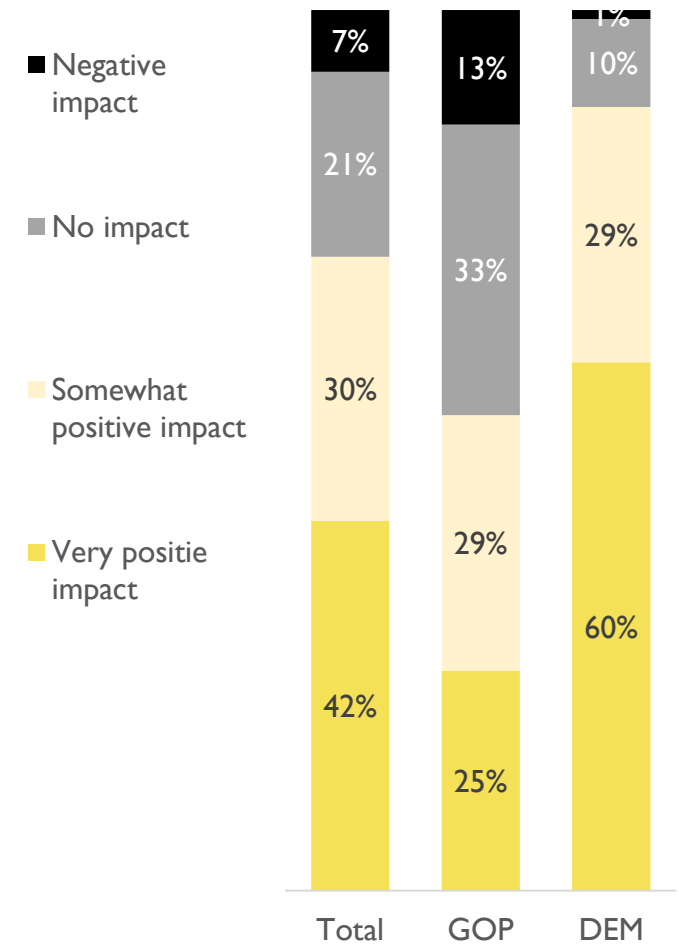
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### Will this policy have a positive or negative impact on jobs and the economy?



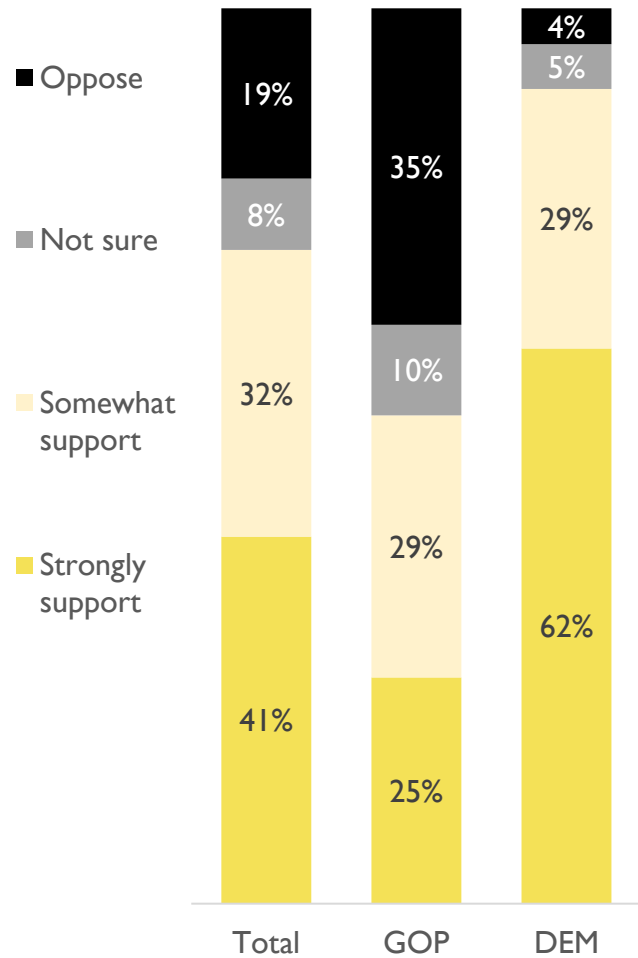
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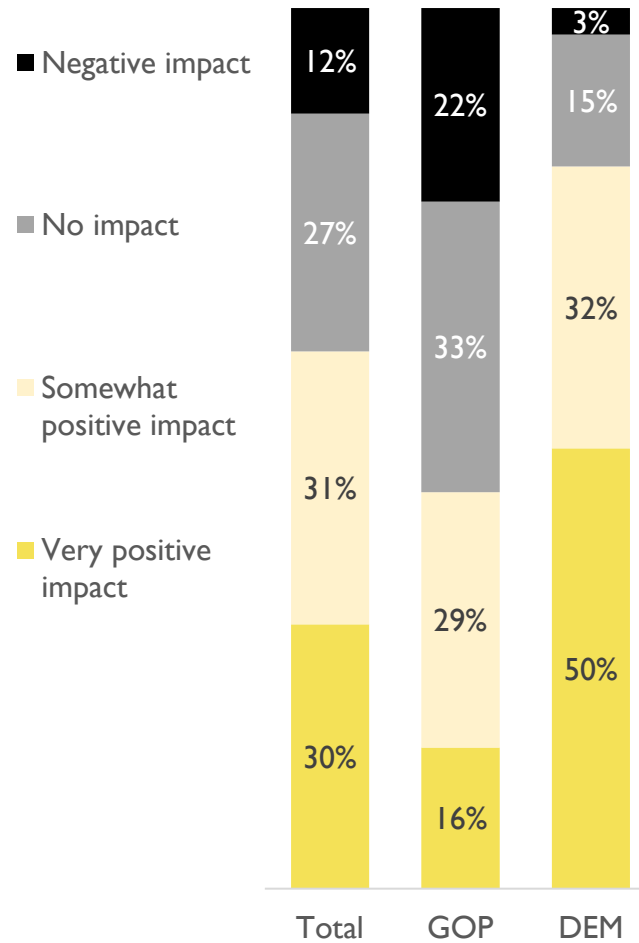
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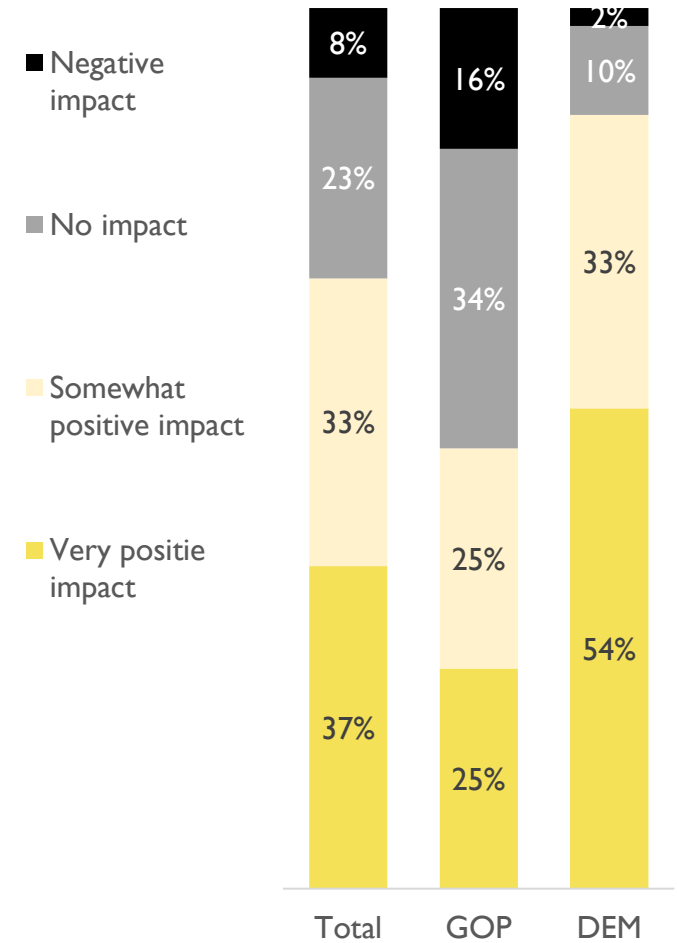
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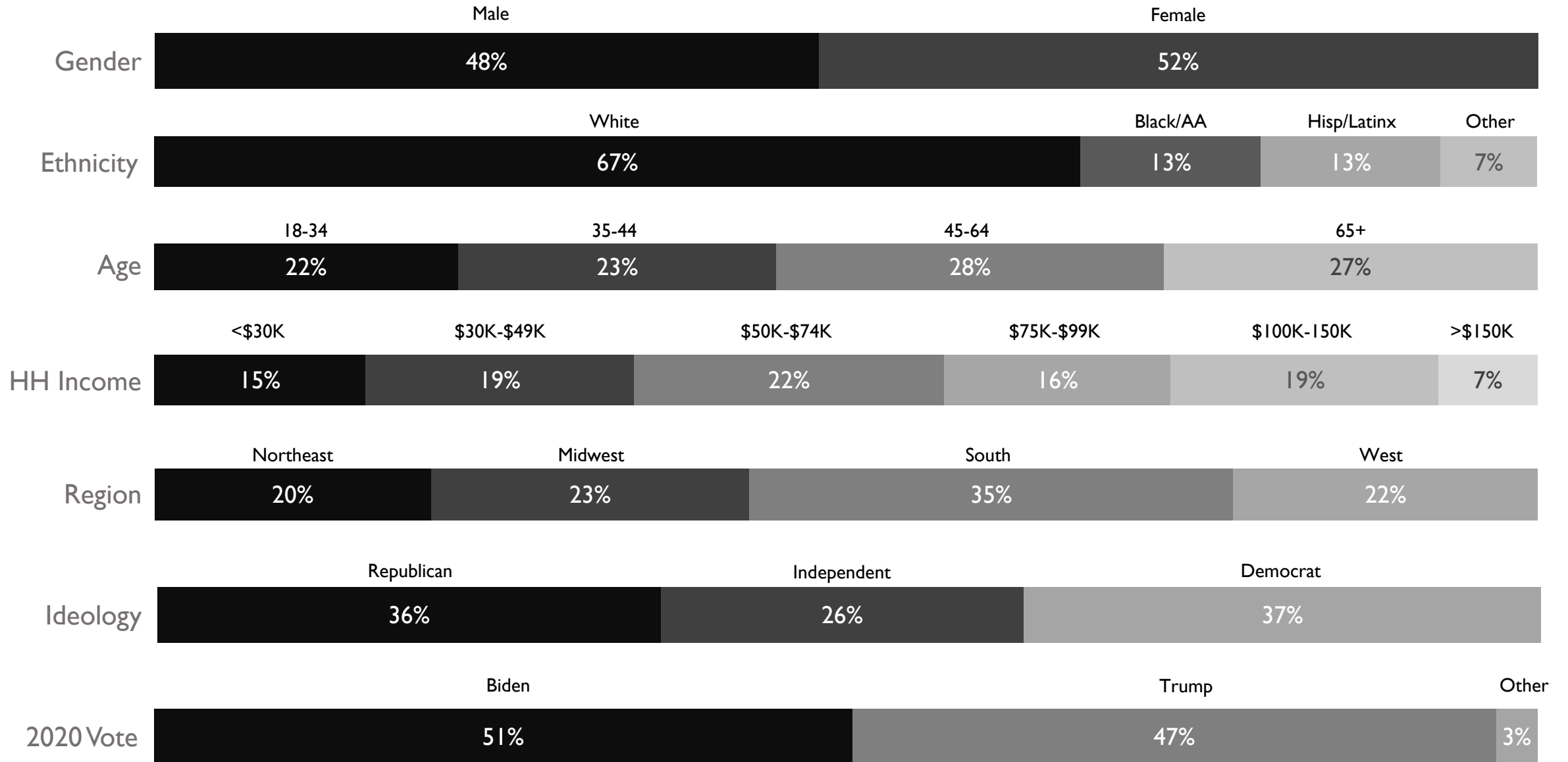


# METHODOLOGY:

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# QUANTITATIVE: NATIONAL VOTER SAMPLE BREAKDOWN: N=1000

(N = 1000 | Fielded 2-14-22 to 2-22-22 | M.o.E +/- 3.1%)



# THANK YOU!

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