

ROADMAP FOR POLICY MOMENTUM

August 2026

Quantitative Survey Results

Powered by Seven Letter Insight's Monthly Tracker



Seven Letter Insight's Tracker

The tracker is a monthly, N=1300 online survey fielded with a representatively sampled group of American voters. It is designed to help decisionmakers and leaders stay up-to-date with voter sentiment.

The survey was fielded from August 14-23, 2026 and has a margin of error of +/- 2.72%. Smaller demographic callouts have a range of larger margins of error based on the number of respondents represented in each group.

Future EV adoption is strengthening.

More than half now expect to own or lease an EV within five years, even as near-term purchase intent remains steady.

Affordability is increasingly shaping the market.

Given rising costs, consumers' priorities are shifting over time, and manufacturers must focus on offering lower-cost EVs to answer the call.

Charging remains a barrier, but the concern is evolving.

Consumers are increasingly focused on range, charging speed, and station access, rather than simply whether they can charge at home.

Reducing pollution is gaining ground as both a benefit and policy priority.

Reduced air pollution is rising as an EV benefit across partisan lines, most notably among Republicans, whose support for stronger pollution standards is also increasing.



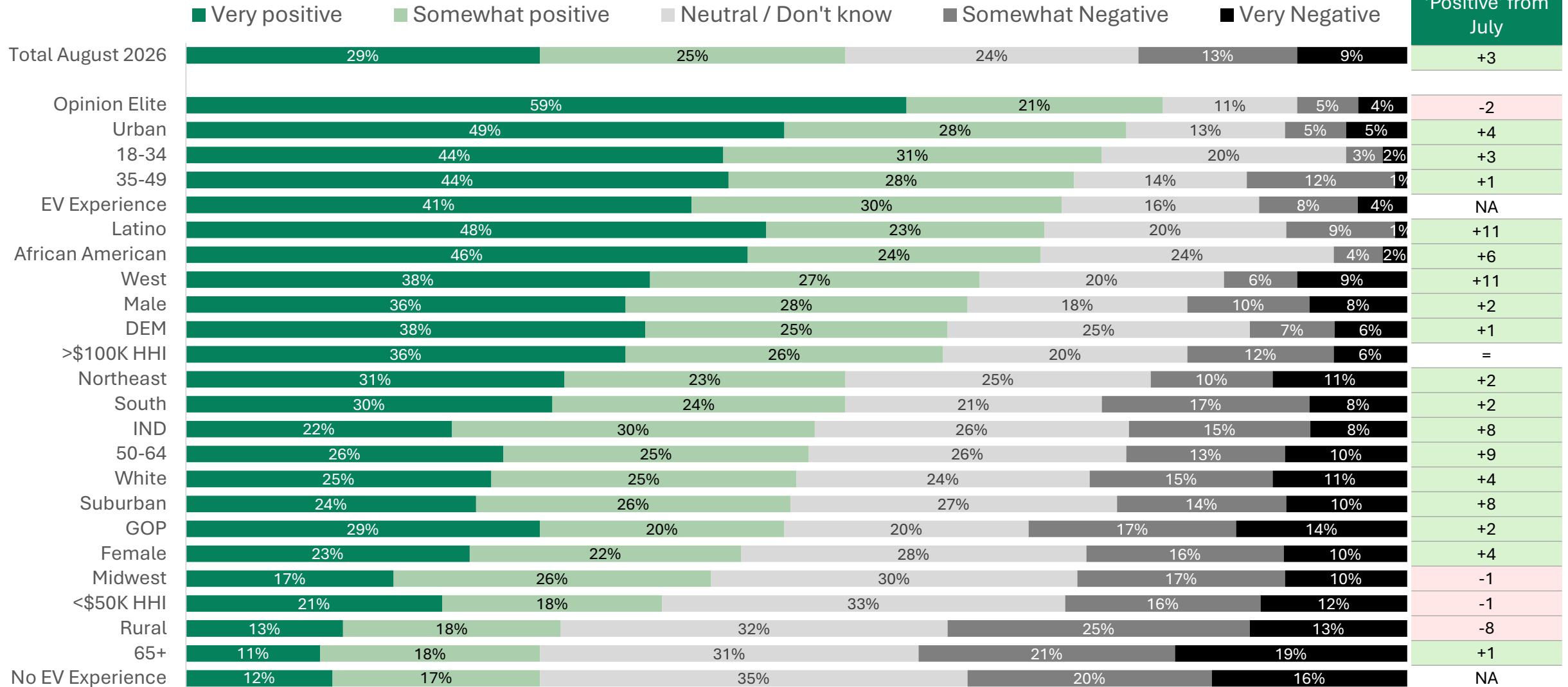
PERCEPTIONS OF CLEAN VEHICLES

Overall EV favorability rose modestly, with gains cutting across several key groups. The largest increases came among Latino, African American, Independent, and middle-aged consumers. Age and community type continue to define the sharpest divides while firsthand experience with EVs, even simply having ridden in one, emerges as a major driver of positive perceptions.

THE DEMOGRAPHICS BEHIND EV SUPPORT.

Experience with EVs proves to be a large driver behind support, along with age and community type.

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

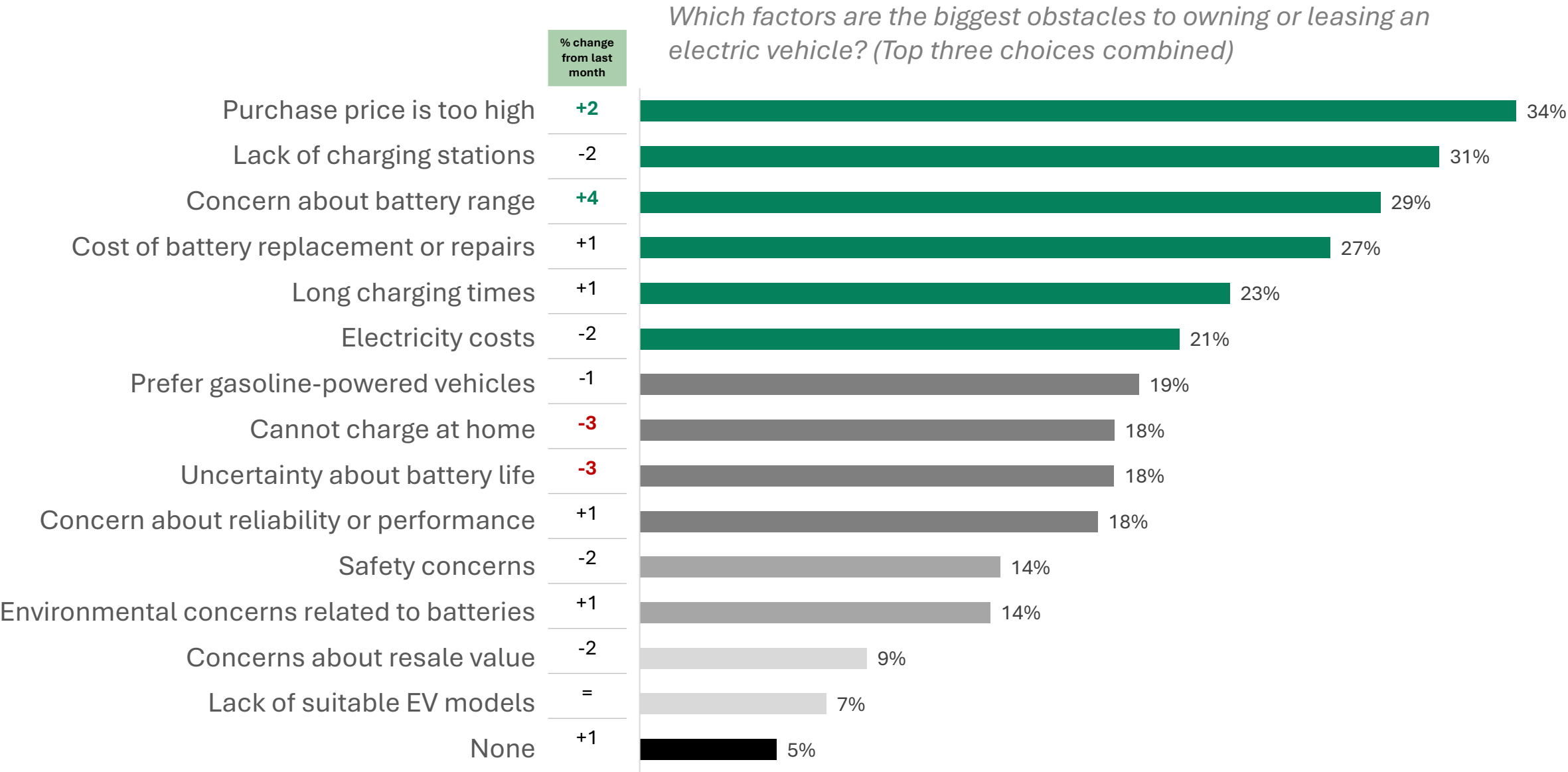




CHALLENGES TO OVERCOME

Costs and charging remain the biggest barriers to EV adoption, but the nature of charging concerns is shifting. Consumers are increasingly focused on getting more range and faster charging when they plug in, rather than simply the ability to charge at home.

CONCERNS ABOUT COSTS & CHARGING CONTINUE TO DOMINATE.



IN THEIR OWN WORDS:

*Why are you unlikely to purchase a **new** electric vehicle? (asked only among those only a little or not likely)*

A word cloud illustrating reasons for not purchasing a new electric vehicle. The most prominent words are 'charging stations', 'expensive', 'gas powered', and 'charge'. Other visible terms include 'range', 'long to charge', 'upfront cost', 'prefer gasoline', 'driving range', 'charge at home', 'trust', 'car', 'costs', 'home power', 'battery life', 'gas', 'prefer gas', 'hybrid', 'long distance', 'road trips', 'batteries', 'afford', 'infrastructure', 'longer trips', 'trust the technology', 'gas powered vehicles', 'expensive to buy', 'drive', 'battery', 'time', 'buy cars live', 'cost', 'feel', 'long trips', 'gas cars', 'vehicles', 'gas powered vehicles', 'good investment', 'driving', 'powered vehicles', 'charging infrastructure', 'insurance costs', 'range', 'takes too long', 'prefer gasoline', 'upfront costs', 'high price', 'trust', 'car', 'expensive', 'charging', 'home power', 'battery life', 'gas', 'prefer gas', 'hybrid', 'long distance', 'road trips', 'batteries', 'afford', 'infrastructure', 'longer trips', 'trust the technology', 'gas powered vehicles', 'expensive to buy'.

*Why are you unlikely to purchase a **used** electric vehicle? (asked only among those only a little or not likely)*

A word cloud illustrating reasons for not purchasing a used electric vehicle. The most prominent words are 'charging stations', 'battery life', 'expensive', 'battery replacement', and 'gas powered'. Other visible terms include 'cost of replacing', 'battery replacement costs', 'concerned about battery life', 'purchase used vehicles', 'uncertain battery', 'places to charge', 'prefer gasoline vehicles', 'money to buy', 'expensive to replace', 'else's problems', 'technology', 'trust', 'prefer to buy', 'car', 'vehicles', 'gas powered cars', 'long charge cost', 'powered vehicles', 'prefer to purchase', 'gas powered vehicles', 'buy used cars', 'feel comfortable', 'interested', 'buy someone else's problems', 'replacing battery', 'long distances', 'charging stations and battery', 'trust electric vehicles', 'battery', 'prefer', 'buy', 'gas vehicles', 'batteries', 'trust used cars', 'buy new cars', 'prefer new vehicles', 'battery replacement costs', 'concerned about battery life', 'purchase used vehicles', 'uncertain battery', 'places to charge', 'prefer gasoline vehicles', 'money to buy', 'expensive to replace', 'else's problems', 'technology', 'trust', 'prefer to buy', 'car', 'vehicles', 'gas powered cars', 'long charge cost', 'powered vehicles', 'prefer to purchase', 'gas powered vehicles', 'buy used cars', 'feel comfortable', 'interested', 'buy someone else's problems', 'replacing battery', 'long distances', 'charging stations and battery', 'trust electric vehicles'.

WHAT WE'RE HEARING: *(Open-ended responses about barriers for EV purchasing)*

*Q: Why are you unlikely to purchase a new/used electric vehicle?
(asked only to those only a little or not likely to purchase that type of vehicle)*

Top Barriers: *(based on open-ended responses)*

1. Higher upfront costs. (stronger in new)

Affordability remains a dominant barrier, with little change among new EV shoppers. Cost concerns appear somewhat more frequently among used EV shoppers after softening last month.

2. Charging concerns. (stronger in new)

Charging access and range remain major barriers, but they are much more prominent for new EV shoppers this month.

3. Reliability & battery issues. (stronger in used)

Battery health, replacement costs, and remaining lifespan continue to weigh especially heavily on used EV shoppers, with little change in this concern from last month.

4. Preference for gas-powered vehicles. (both)

Consumers continue to express a basic preference for gasoline vehicles or lack of interest in EVs, a sentiment that is largely unchanged from last month.

5. Skepticism that EVs fit lifestyle. (both)

Concerns about convenience, driving needs, weather, and the practicality of owning an EV remain common, with little change from last month.



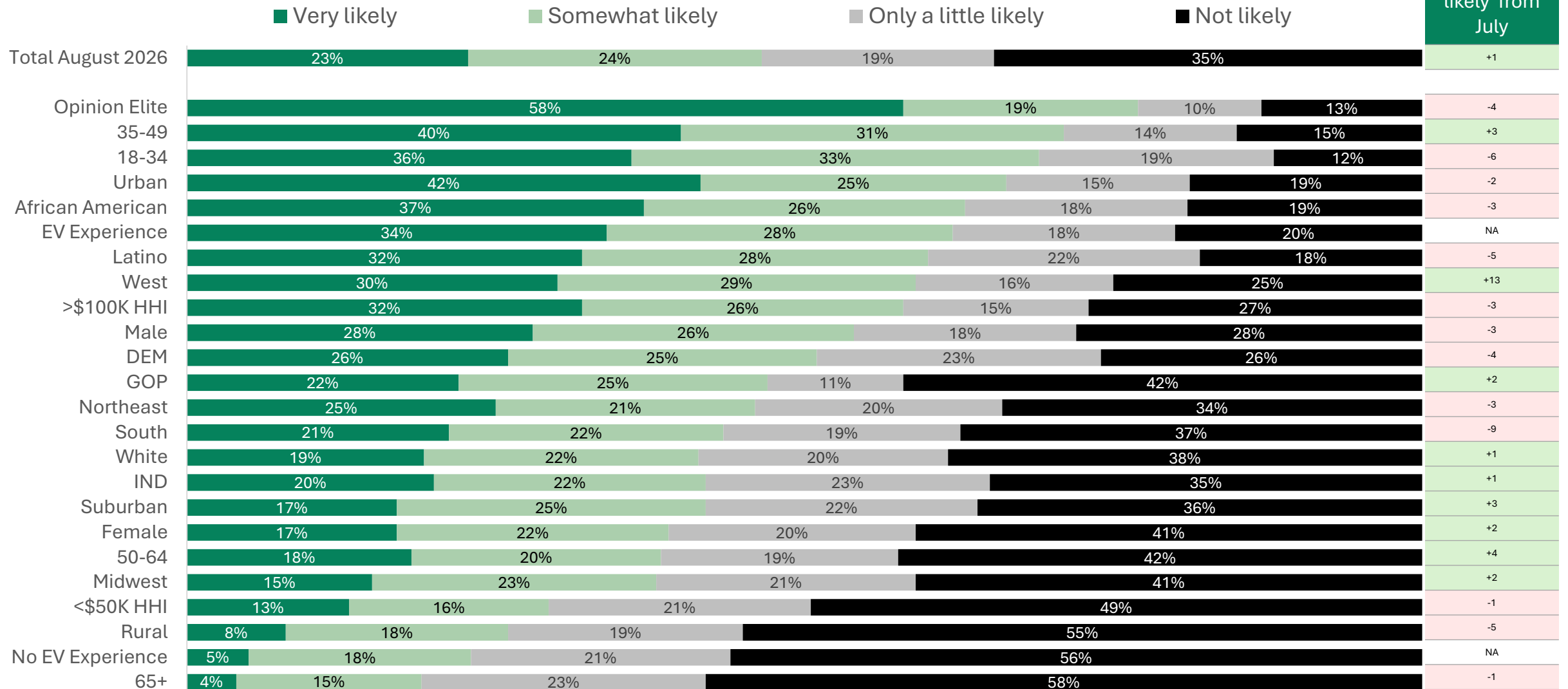
DRIVING PURCHASING BEHAVIOR

Future EV ownership is rising even as near-term purchase intent remains steady. More than half of consumers now think they will own or lease an EV within five years, while fewer than one-in-four say they definitely will not.

47% WOULD CONSIDER A NEW ELECTRIC VEHICLE.

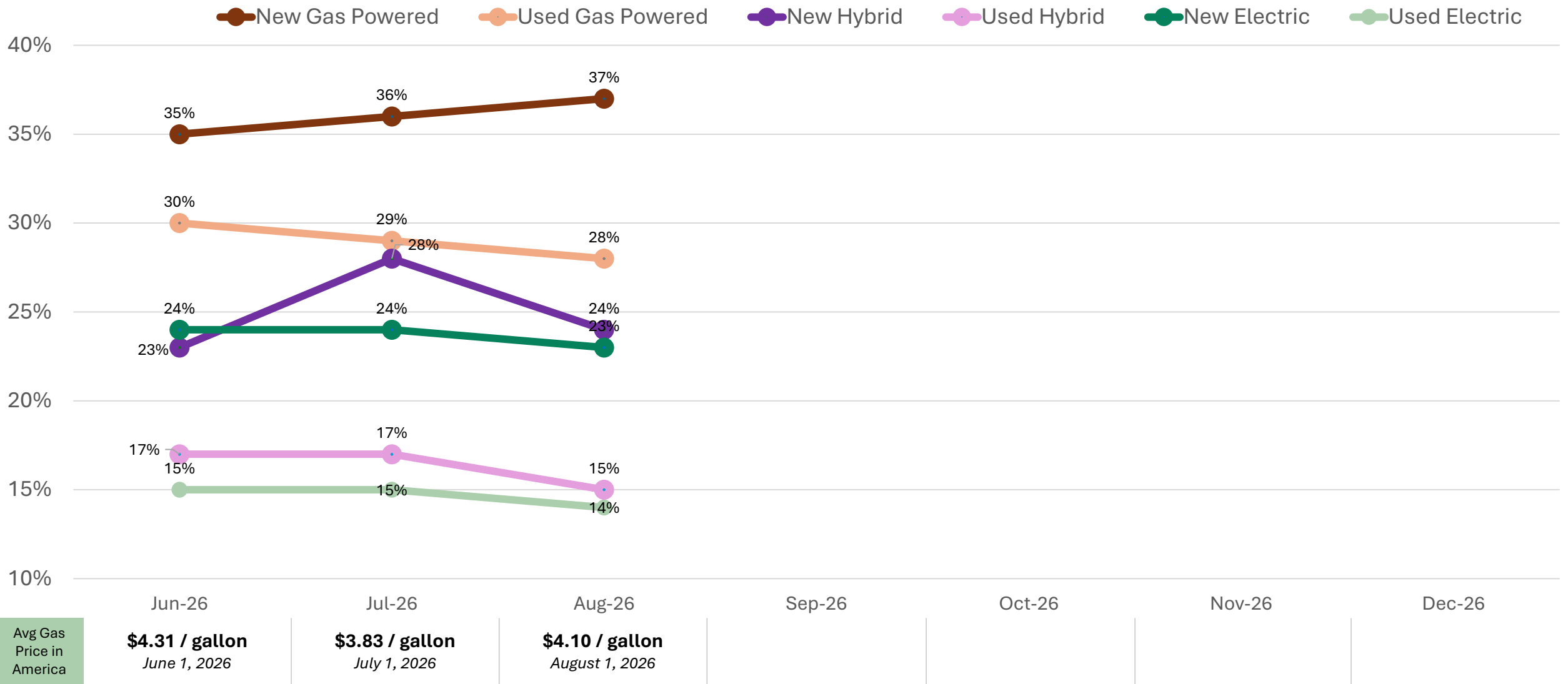
Overall intent is stable, but increased notably among those in the west, while softening among those 18-34.

How likely are you to purchase or lease a new electric vehicle?



PURCHASING INTENT BY VEHICLE TYPE:

How likely are you to purchase or lease the following types of vehicles for your next vehicle?
(Showing “Very likely” responses)

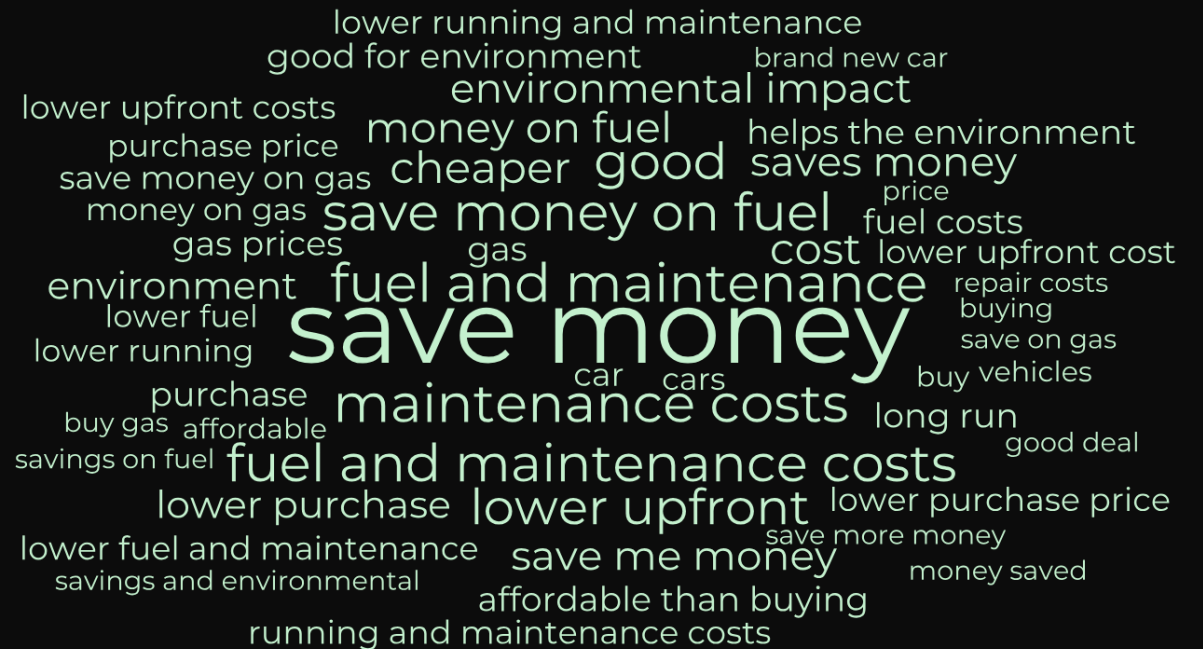


IN THEIR OWN WORDS:

*Why are you likely to purchase a **new** electric vehicle? (asked only among those very or somewhat likely)*



*Why are you likely to purchase a **used** electric vehicle? (asked only among those very or somewhat likely)*



WHAT WE'RE HEARING: *(Open-ended responses about drivers for EV purchasing)*

*Q: Why are you likely to purchase a new/used electric vehicle?
(asked only to those very or somewhat likely to purchase that type of vehicle)*

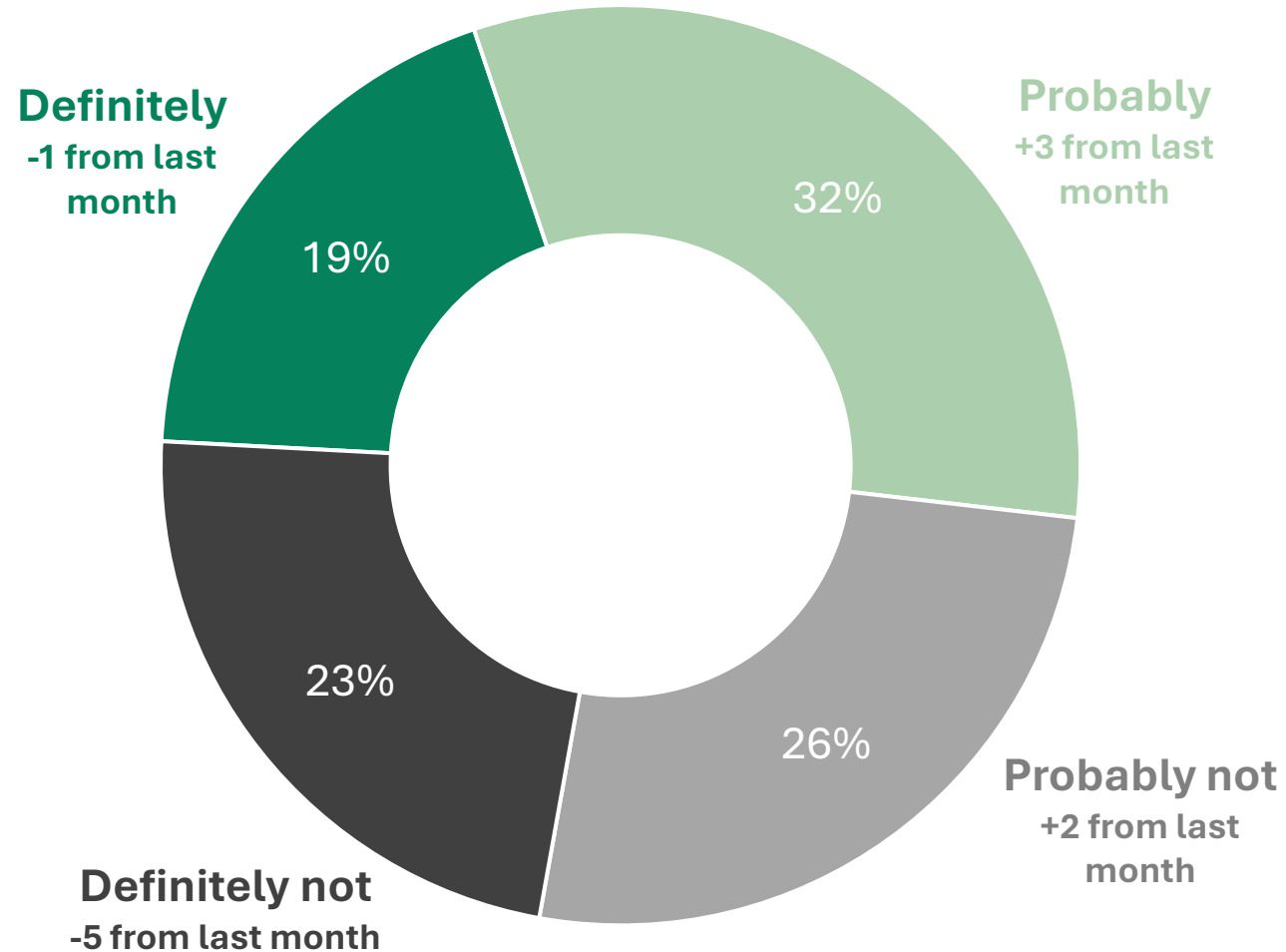
Top Drivers: *(based on open-ended responses)*

- 1. Save money on ownership costs. (both)**
Lower fuel costs and long-term savings remain the dominant reasons for considering an EV, with affordability with little change from last month.
- 2. Environmental benefits. (stronger in new)**
Environmental benefits remain a prominent motivation for new EV shoppers and a secondary consideration for used buyers, largely unchanged from last month.
- 3. Lower purchase price. (much stronger in used)**
Affordability and getting a lower-priced vehicle have become even clearer drivers of used EV interest this month.
- 4. Access to latest technology. (stronger in new)**
New EV shoppers continue to value the latest technology, performance, and modern features, with little change from prior months.
- 5. Long term value. (both)**
Consumers continue to frame EVs as a practical financial choice based on savings over time and lower ownership costs. This theme is stable from last month.

OVER HALF SAY THEY'LL SWITCH IN 5 YEARS.

And those who say they definitely will not switch has also dropped to under a quarter.

Q: In 5 years, do you think you will own or lease an electric vehicle?



The most likely groups to own an electric vehicle in 5 years

(showing "**definitely**" responses)

Opinion Elites: 45%

Urban: 34%

African American: 34%

Age 35-49: 32%

Latino: 31%

Age 18-34: 30%

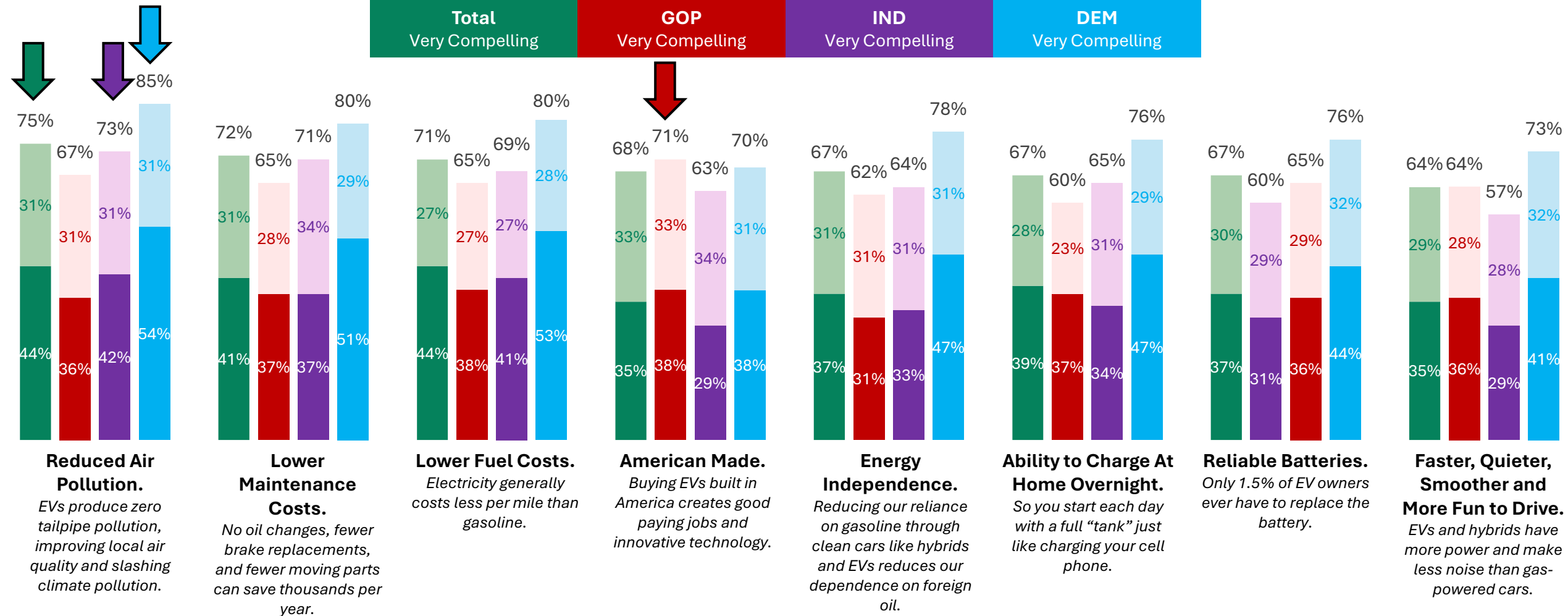
Those with EV experience: 28%

THE BEST ARGUMENT: REDUCED POLLUTION

Republicans have shifted to prioritizing reduced pollution over other benefits this month.

How compelling do you find each of the following potential benefits of clean cars and electric vehicles?

Total Somewhat Compelling	GOP Somewhat Compelling	IND Somewhat Compelling	DEM Somewhat Compelling
Total Very Compelling	GOP Very Compelling	IND Very Compelling	DEM Very Compelling



RANGE & CHARGING IMPROVEMENTS MATTER MORE THAN FUEL PRICE.

Though improvements on frequency and speed of charging are rising while at home charging has fallen.

Total August 2026	Change From Last Month	OE	Age 18-34	GOP	IND	DEM	< \$50K HHI	>\$100K HHI	Which changes or improvements would make you more likely to purchase or lease an electric vehicle? (top three choices combined)
29%	+1	30%	26%	24%	35%	29%	23%	34%	Improved battery range of 300 miles or more
23%	-4	25%	19%	13%	32%	26%	24%	21%	Ability to charge at home
22%	-3	21%	16%	17%	31%	18%	21%	25%	EVs costing the same or less than comparable gas-powered vehicles
22%	-1	25%	35%	24%	20%	22%	24%	21%	Lower maintenance costs
22%	+2	22%	22%	18%	27%	20%	15%	25%	Faster charging times under 10 minutes
21%	=	19%	19%	23%	20%	20%	18%	21%	More charging stations available
21%	-1	19%	30%	19%	22%	21%	20%	21%	Lower fuel / energy costs
19%	=	14%	31%	19%	20%	19%	18%	16%	Rising gas prices
18%	+2	32%	20%	21%	15%	17%	16%	23%	Better vehicle performance or technology
17%	-1	16%	14%	17%	15%	19%	15%	17%	Government incentives, rebates, or tax credits
13%	+2	20%	12%	15%	11%	13%	8%	14%	Ability to sell energy back to the grid for bill credits or energy
12%	+1	24%	16%	12%	11%	12%	2%	18%	Greater variety of EV models available
8%	=	15%	12%	7%	5%	12%	3%	10%	Future regulations favoring EVs
17%	=	6%	9%	23%	12%	16%	31%	11%	Nothing would make me likely to own or lease an electric vehicle

BRAND LOYALTY DECREASES AS COST CONCERNS CONTINUE TO RISE.

Only about 14% demonstrate true brand loyalty when purchasing a vehicle.

When shopping for a vehicle to purchase or lease, which best describes your approach?

40%

I compare several vehicle brands before deciding.

+8 from last month
Most common among Latinos and non-White consumers, with Independents, younger consumers, and those in the Midwest and Northeast also more likely to shop across brands.

36%

I strongly prefer one vehicle brand but consider others.

-2 from last month
Middle-aged and middle-income consumers are most likely to fall here, along with consumers in the West and South.

14%

I almost always choose the same vehicle brand.

-3 from last month
Opinion Elites remain the most brand loyal, followed by Republicans and older consumers.

7%

I have no strong vehicle brand preference.

-2 from last month
Lower-income consumers stand out as most likely to have no brand preference.

3%

I am not sure.
-2 from last month

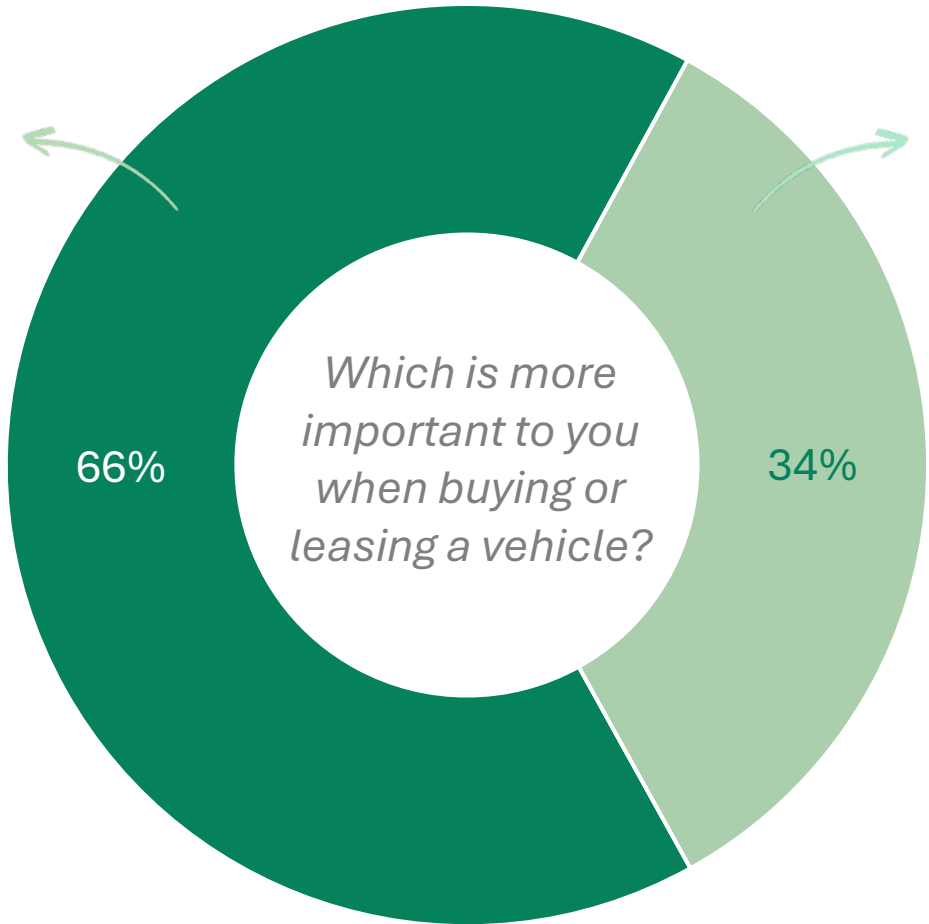
AMERICANS PRIORITIZE AFFORDABILITY.

Given rising costs, consumers' priorities are shifting over time and manufacturers are offering lower-cost EVs to answer the call.

Buying the most cost-effective vehicle, even if it is imported.

Who agrees the most?
+4 from last month

Age 65+: 74%
Suburban: 72%
Democrats: 71%
Independents: 71%
\$50K-\$100K HHI: 70%



Buying a vehicle made in America, even if it costs more.

Who agrees the most?
-4 from last month

Republicans: 42%
Opinion Elite: 42%
Age 50-64: 42%
Urban: 40%

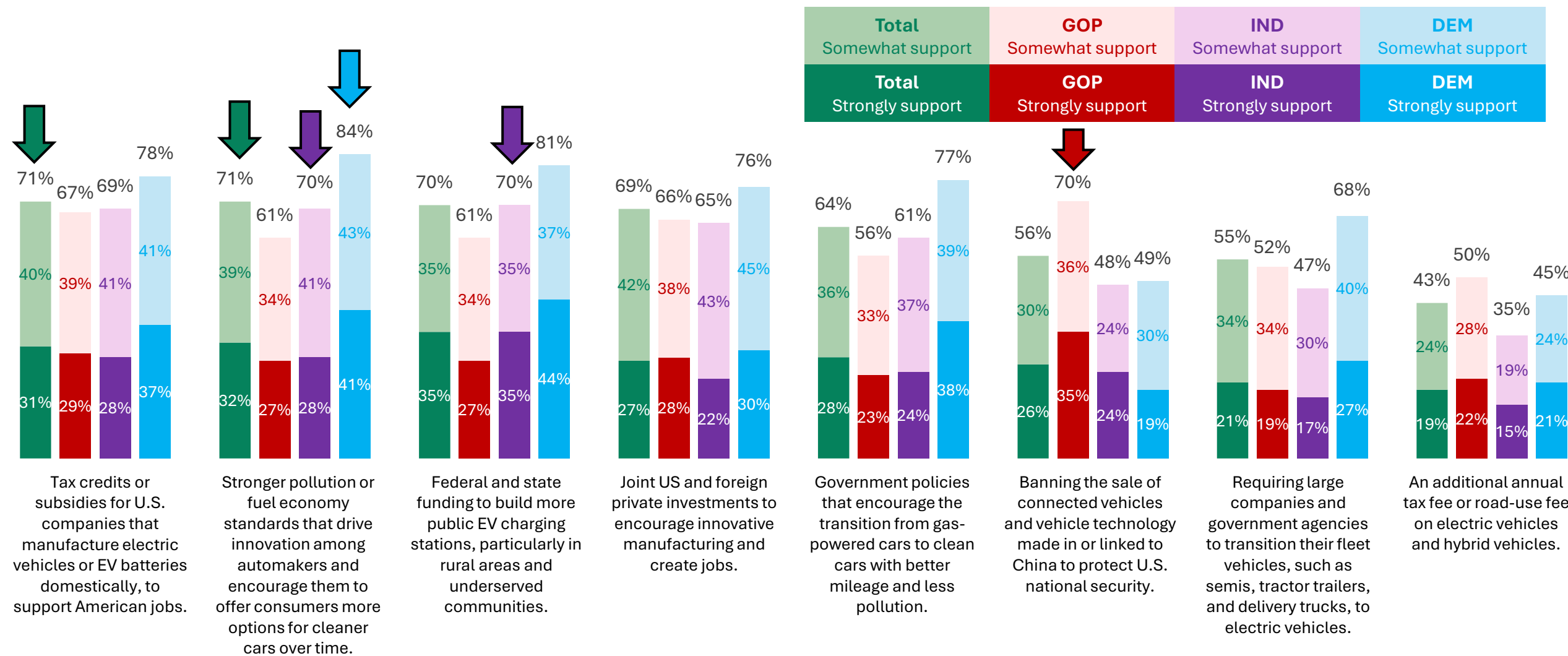
PUBLIC POLICY PERCEPTIONS

Pro-EV policies are gaining ground with voters, especially Republicans, but losing some support among Opinion Elites. Stronger standards and fleet transition requirements both improved overall as GOP support rose, even as Opinion Elite backing declined. Most policies still command broad support, with the EV road-use tax standing apart as the only proposal without majority support.

CLEAN VEHICLE POLICY – HEAD-TO-HEAD:

Soft support for nearly all policies (meaning more “somewhat support” than “strongly support” responses).

How compelling do you find each of the following potential benefits of clean cars and electric vehicles?

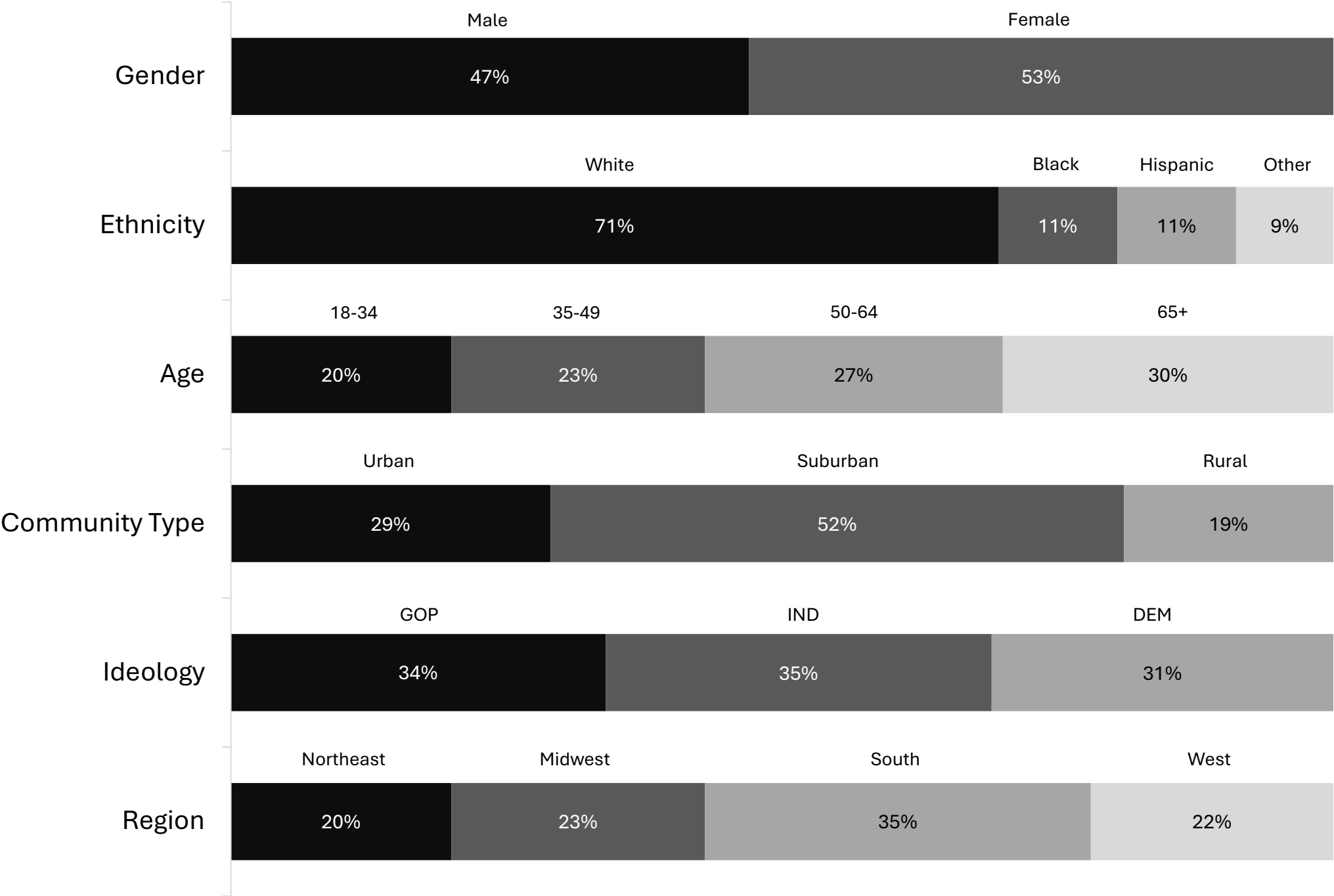


SAMPLE BREAKDOWN:

N=1300
n=1000 National Voters
n=300 Opinion Elite

Fielded:
August 14-23, 2026

M.o.E:
+/- 2.72%





THANK YOU!

Z E T A
ZERO EMISSION TRANSPORTATION ASSOCIATION

 **Generation180**

SEVEN
LETTER
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