To: Interested Party
Re: Key Findings from ZETA's February 2022 Electric Vehicle Perception Index Study

SEVEN LETTER INSIGHT POLLING METHODOLOGY:

- *Field Dates: 2-14-22 to 2-22-22*
- *Sample: U.S. National online: Likely voters who are also vehicle lessees or owners*
- *Sample Size: 1000 participants*
- *Margin of Error: +/-3.1%*
- *Our sampling took care to mirror nationwide ideology and geographic distribution, as well as proportional representations of key demographics such as age, income, education, ethnicity, gender, and community type.*

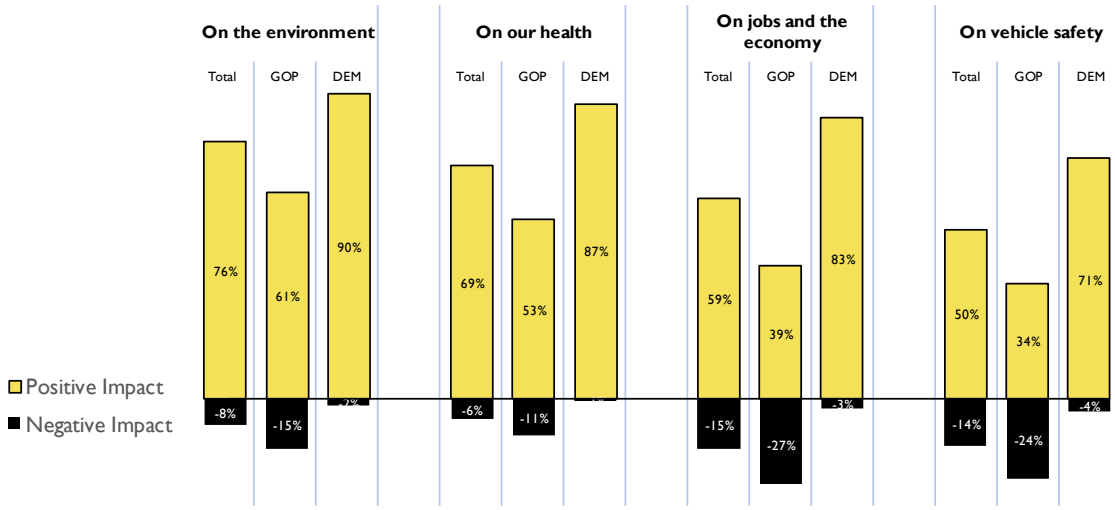
KEY DATA INSIGHTS:

- There has been a noticeable uptick in improved perceptions of electric vehicles generally over the last year. Voters and consumers realize the positive impact that electric vehicles can have on the environment, on our health, on supporting the economy with new jobs, and on vehicle safety.
- There is bipartisan support for smart policies designed to increase the adoption of electric vehicles. 79% of voters support providing consumer incentives that would reduce the purchase price of electric vehicles and why 69% of voters would support federal, state, and local investments to expand the electric vehicle charging network.
- Electric vehicles are officially "cooler" than gas-powered vehicles. When compared head-to-head, EVs are now considered the "cooler" option. This signals a sea change in perceptions for electric vehicles.
- Electric vehicles are becoming a real consideration for many vehicle consumers. 1 in 5 American car owners who are also likely voters would "definitely choose" an electric vehicle for their next purchase. Another 27% would "strongly consider" an electric vehicle.

KEY FINDINGS:

1. **Majorities of voters believe that increasing electric vehicle adoption will have a positive impact on the environment, on our health, on jobs and the economy, and on vehicle safety**. The vast majority of Democrats agree. The majority of Republicans believe that electric vehicles will benefit the environment and our health; while a plurality of Republicans believe that increasing electric vehicle adoption will have a positive impact on jobs and the economy. Over one third of Republican voters believe increased electric vehicle adoption could have a net benefit to vehicle safety.

Question: If electric vehicle adoption increased, do you think it would have a positive or negative impact on …

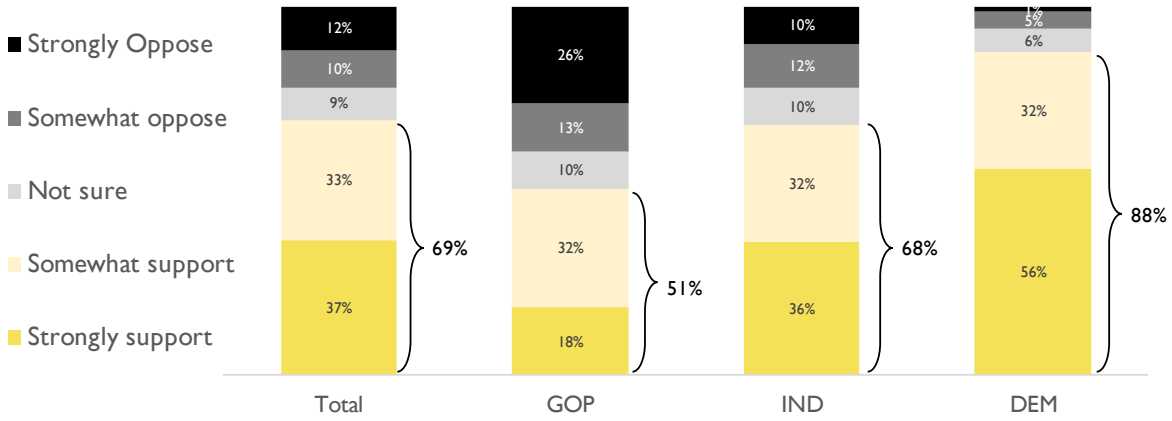


2. **There is BROAD, bipartisan support for smart policies designed to increase adoption of electric vehicles.** The table below includes top-testing policy options where voters see an overwhelming benefit to both improving the economy and to addressing climate change. It is notable that each of the policies listed below also enjoys a MAJORITY of support from Republican voters, making each of these policies a clear bipartisan solution to making electric vehicles more accessible for more consumers.

	Support or oppose this policy? *(Showing only "Support" responses)*			**Positive or negative impact on jobs & economy?** *(Showing only "Positive impact" responses)*			**Positive or negative impact on environment and climate change?** *(Showing only "Positive impact" responses)*		
	Total	**GOP**	**DEM**	**Total**	**GOP**	**DEM**	**Total**	**GOP**	**DEM**
Provide incentives that would reduce the consumer price of electric vehicles.	79%	63%	94%	67%	51%	83%	71%	53%	88%
Provide incentives for the electrification of larger vehicles like trucks, freight trucks and school buses.	69%	50%	87%	63%	45%	83%	75%	60%	89%
Create federal policies to encourage domestic manufacturing of electric vehicles	73%	56%	89%	70%	52%	87%	69%	52%	87%
Invest in research and development to help drive down the cost and increase the range of electric vehicles.	78%	62%	91%	69%	50%	86%	72%	53%	89%
Provide incentives for businesses to install electric vehicle chargers on their property.	73%	54%	91%	61%	45%	82%	69%	50%	87%

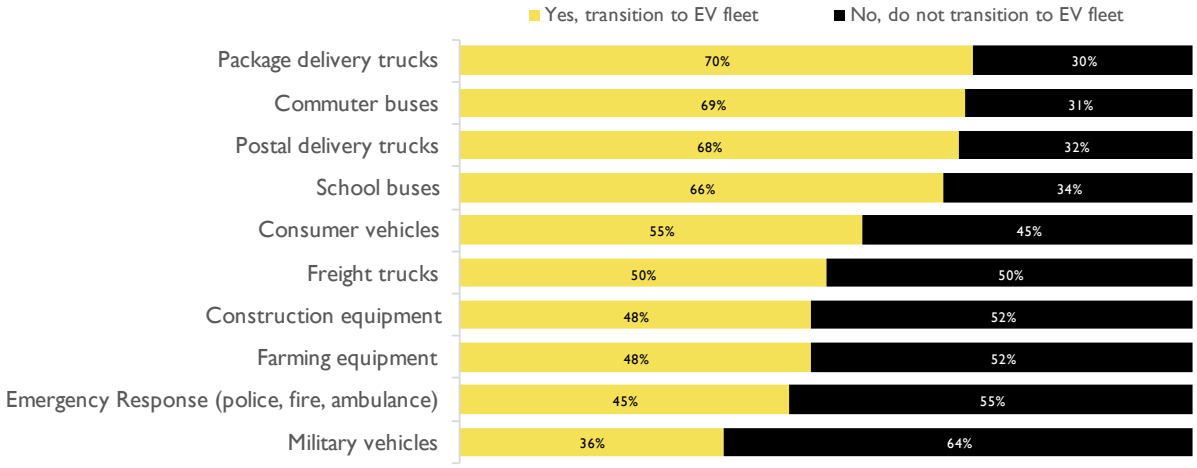
3. **There is bipartisan support for public investment that would help to transition public transportation vehicles from gas-powered vehicles to electric vehicles.** A majority of each ideological group support these incentives. Republicans: 51% support. Independents: 68% support. Democrats: 88% support.

Question: Would you support or oppose federal, state, and local investment for transitioning public transportation vehicles from gas-powered vehicles to electric vehicles?



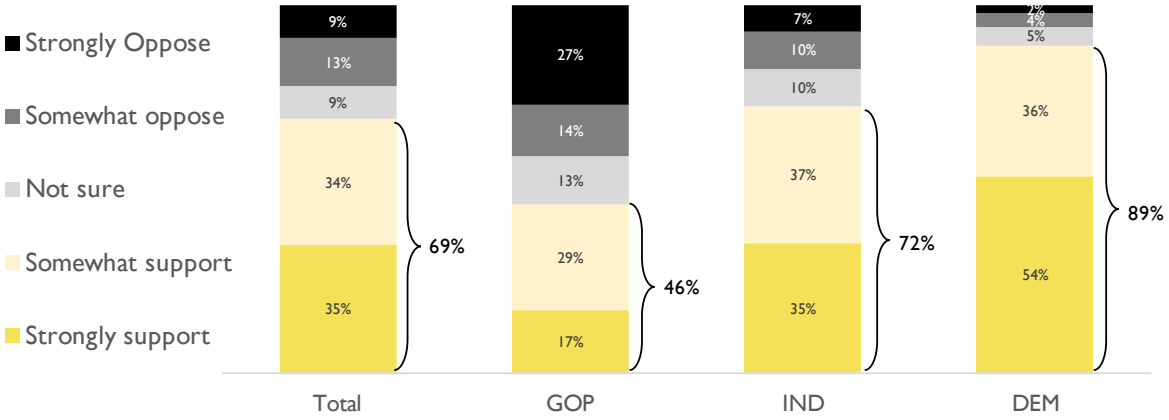
4. **Most voters are ready to electrify package and postal delivery trucks, public transportation vehicles like school and commuter buses, and passenger vehicles.** Voters are more split about electrifying military vehicles, emergency response vehicles, and construction and farming equipment.

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



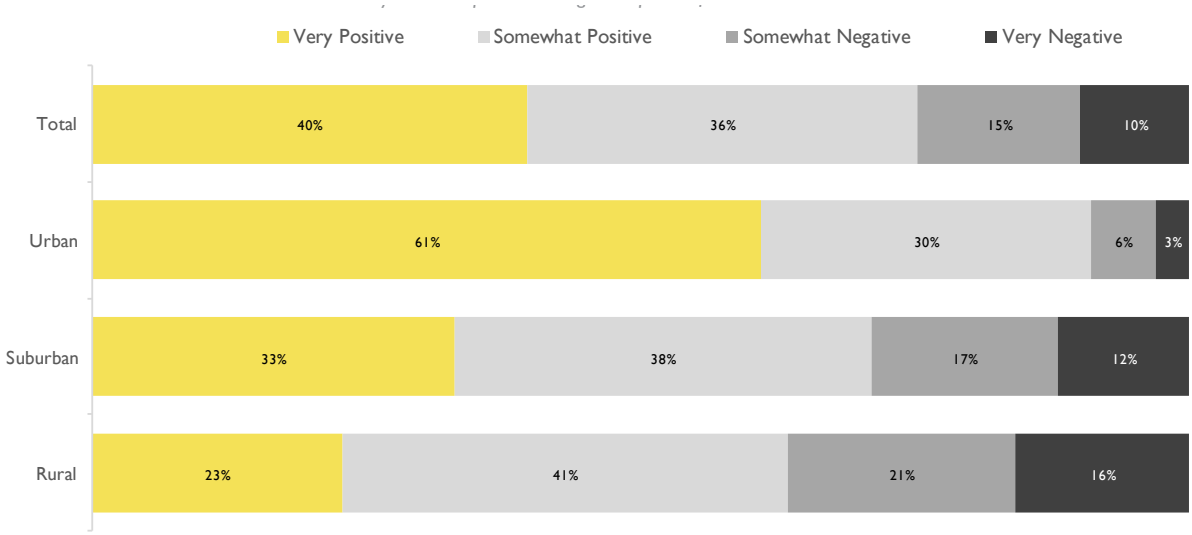
5. **More than two-thirds of voters support public investment to expand the network of chargers for electric vehicles.** This includes a plurality of Republicans (46%) and a majority of Independents (72%) and Democrats (89%).

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



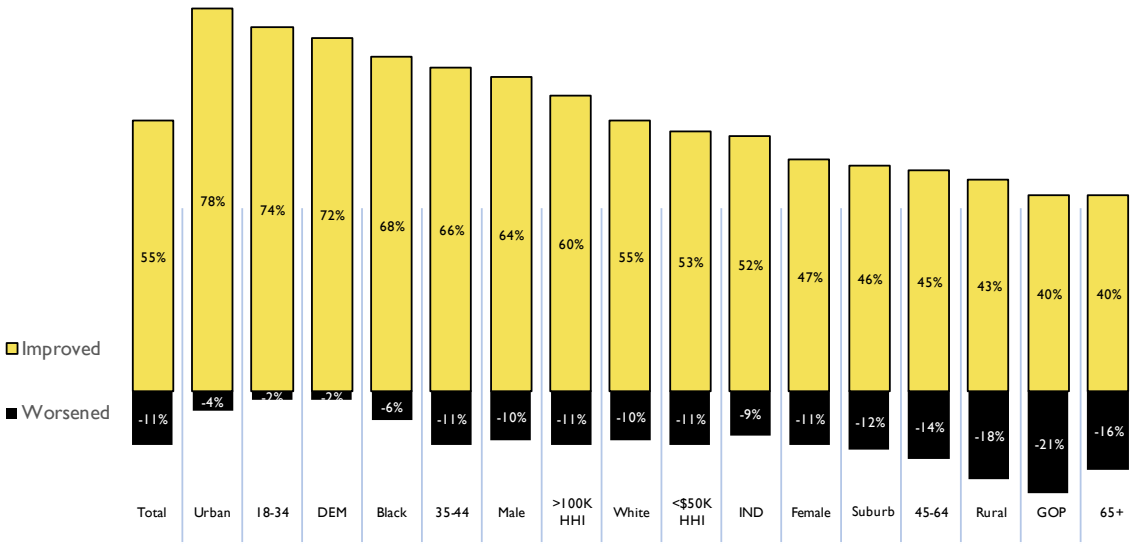
6. **Electric vehicles have a very good reputation, and the intensity of positive reputations appears to be growing**. 2 in 5 voters who also own or lease a vehicle have a "very positive" opinion of electric vehicles. That number jumps up to 3 in 5 when focused on those who live in urban communities.

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



7. **Over half of voters who own or lease vehicles have an improved perception of electric vehicles over the past year.** Only 11% have opinions that have worsened. Groups that contribute to this groundswell of positive perception are younger, male, Democratic voters who live in urban communities.

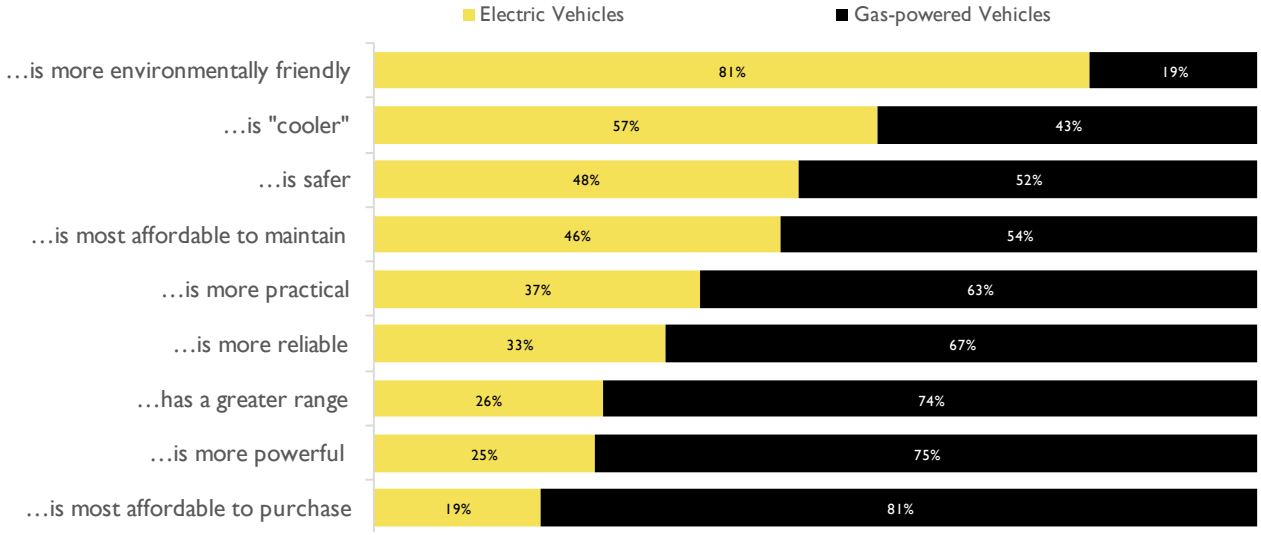
Question: To what extent has your opinion of electric vehicles changed in the past year?



And while older, rural, Republican voters slightly over index on having worsened their opinions of electric vehicles over the last year when compared with the total sample, it is important to note that TWICE as many have *improved* their perceptions of electric vehicles than have had their opinions worsened.

8. **Electric vehicles are officially "cooler" than gas-powered vehicles.** Research shows that a majority of voters who own or lease vehicles believe that electric vehicles are the "cooler" option.

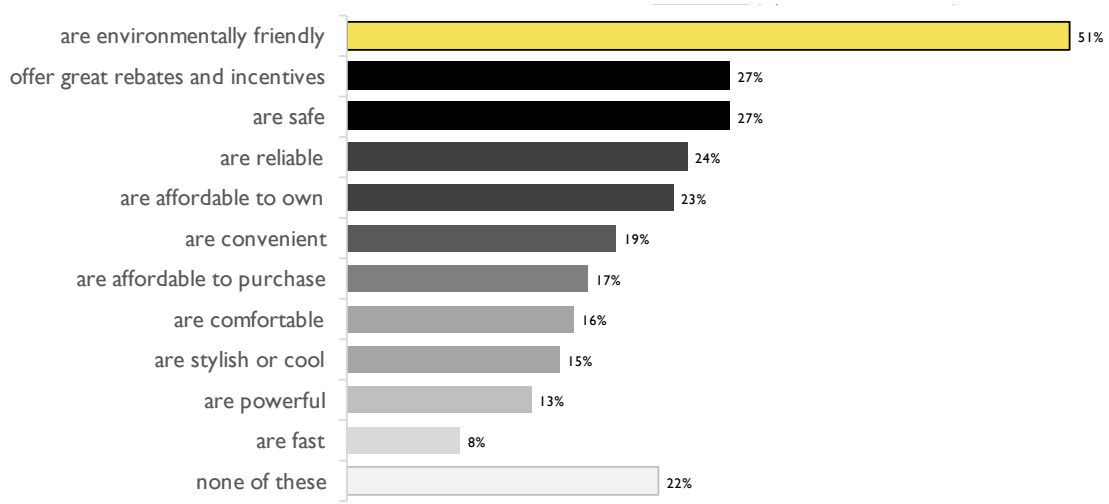
Question: Which type of vehicle do you think …



The vast majority of American vehicle drivers who are also voters believe that electric vehicles are more environmentally friendly than gas-powered vehicles. Electric vehicles are also nearly tied with gas-powered vehicles in perceptions of being "safe" and "affordable to maintain." Electric vehicles still have a far way to go in overcoming gas-powered vehicles in perceptions of being more affordable to purchase, more powerful, having a greater range, being more reliable, and being more practical.

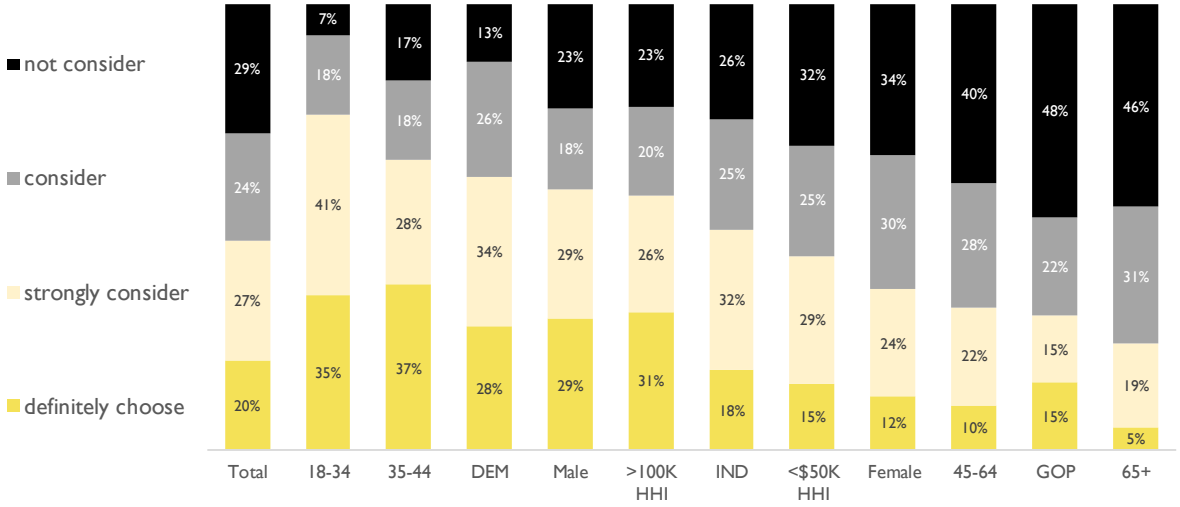
9. **The top benefit of purchasing an electric vehicle, or in advocating for greater electric vehicle adoption, is environmental friendliness.** Environmental friendliness is the biggest perceived competitive advantage of electric vehicles over gas-powered vehicles. It is also the top reason – by far – why someone might choose to purchase an electric vehicle.

Question: Why might you choose to purchase or lease an electric vehicle over a gas-powered vehicle? Because electric vehicles are _____...



10. **1 in 5 voters who own or lease a vehicle would "definitely choose" an electric vehicle for their next purchase or lease. Nearly HALF of voters who own or lease a vehicle would at least "strongly consider" an electric vehicle for their next vehicle**. The most likely electric vehicle purchasers are younger, male, Democratic voters who are more affluent. Age is the most determining factor in potential purchasing considerations (even more than income.)

Question: "I will _____ an electric vehicle for my next purchase or lease."



11. **The biggest perceptional challenges: affordability to purchase, range, and charging accessibility.** These misperceptions must be rectified before electric vehicles can enjoy more widespread consumer acceptance.

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