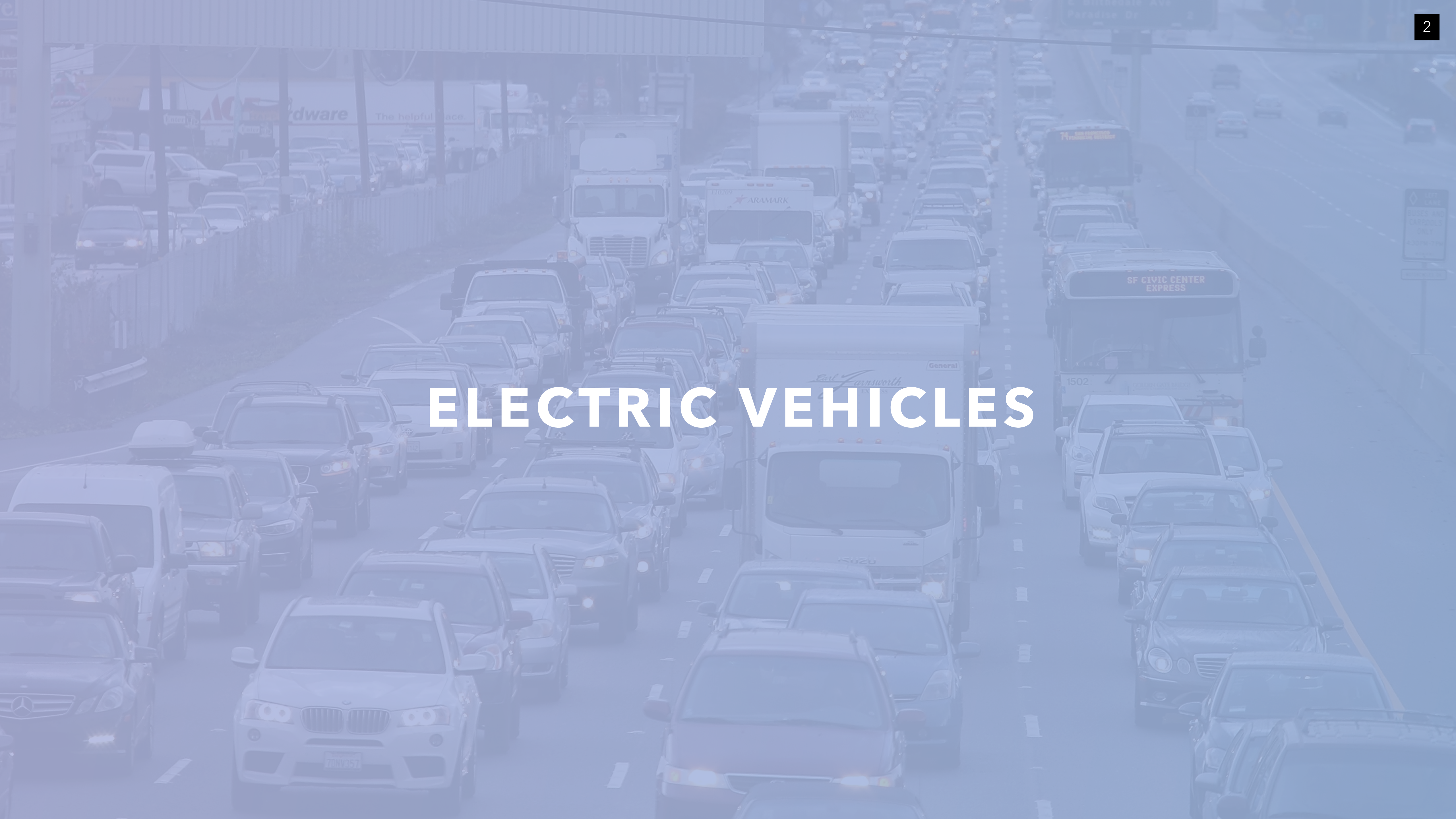


BLUELABS OMNIBUS SURVEY

Opinion Survey of U.S. General Population

SEPTEMBER 2023

ELECTRIC VEHICLES



OVERALL TAKEAWAYS

➤ A PLURALITY OF AMERICANS SAY THEY DEFINITELY OR MIGHT CONSIDER AN ELECTRIC VEHICLE FOR THEIR NEXT PURCHASE – A SIMILAR PERCENTAGE TO OUR FEBRUARY OMNIBUS

Democrats are much more likely than Republicans to consider purchasing an electric vehicle. However, awareness of the electric vehicle tax credit is low amongst both Democrats and Republicans.

➤ REPUBLICANS ARE LESS LIKELY TO CONSIDER BUYING AN ELECTRIC VEHICLE THAN DEMOCRATS AND INDEPENDENTS

However, nearly a third of Republicans who live in urban areas are at least considering an electric vehicle compared to just 8% of Republicans who live in rural areas.

➤ HISPANIC AMERICANS ARE THE MOST LIKELY TO OPT FOR AN ELECTRIC VEHICLE IN THE FUTURE WHILE BLACK AMERICANS EXPRESS THE MOST HESITANCE

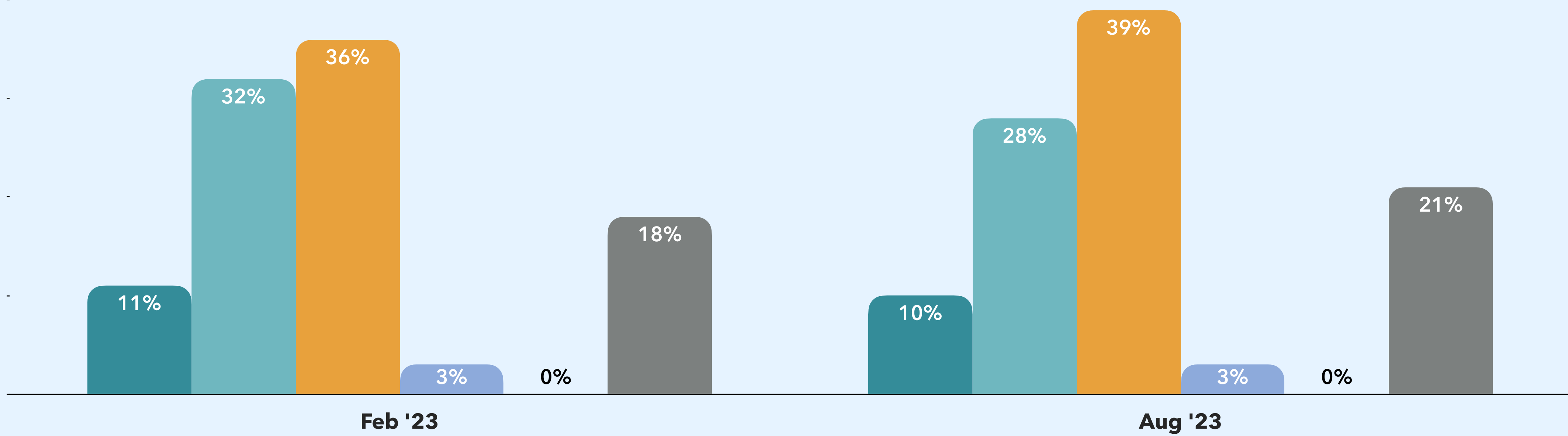
Nearly 20% of Hispanic Americans say they will definitely choose an electric vehicle in their future purchase, two points higher than the general population. Black Americans are more uncertain on their decision to purchase an electric vehicle, with 38% reporting they only might purchase an EV – 10 points higher than the general population.

ELECTRIC VEHICLE PURCHASE PREFERENCES HAVE HELD STEADY SINCE FEBRUARY

Self-reported likelihood of purchasing an electric vehicle has held steady since our February omnibus, with a slight increase in those who say they would not choose an electric vehicle and a slight decrease in those who say that they would definitely or might choose an electric vehicle.

Purchase Likelihood - Electric Vehicle

- WILL DEFINITELY CHOOSE EV
- MIGHT CHOOSE EV
- WOULD NOT CHOOSE EV
- ALREADY HAVE EV; WOULD GET ANOTHER
- ALREADY HAVE EV; WOULD NOT GET ANOTHER
- WOULD NOT BUY / LEASE VEHICLE

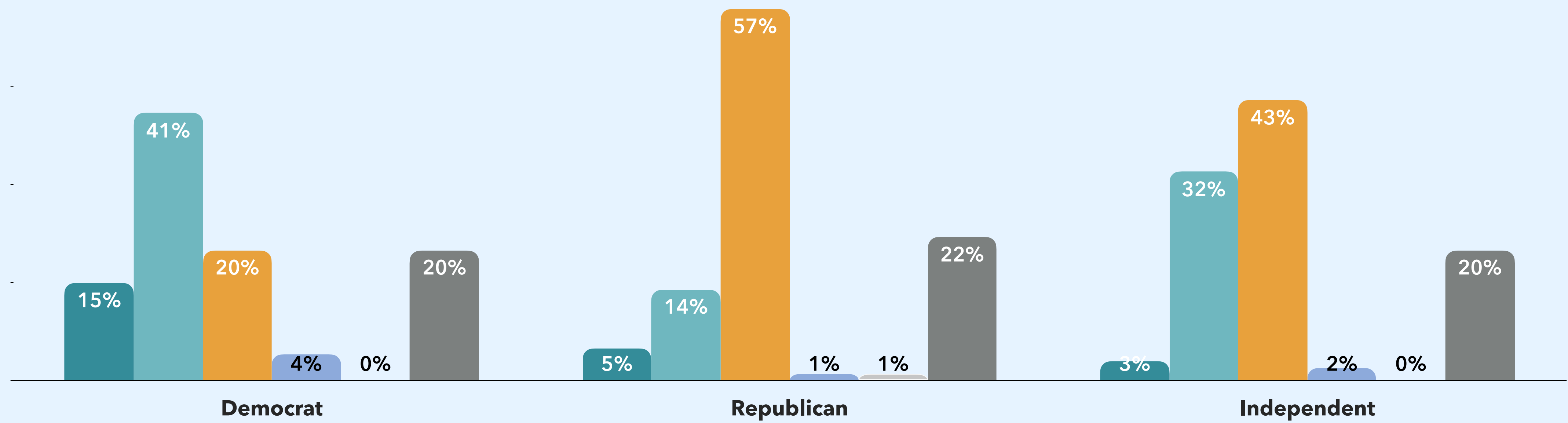


UNSURPRISINGLY, ELECTRIC VEHICLE PURCHASE LIKELIHOOD IS HEAVILY SPLIT BY PARTISANSHIP

Very few Independents would definitely choose an electric vehicle as their next purchase, but a third are open to considering one as an option.

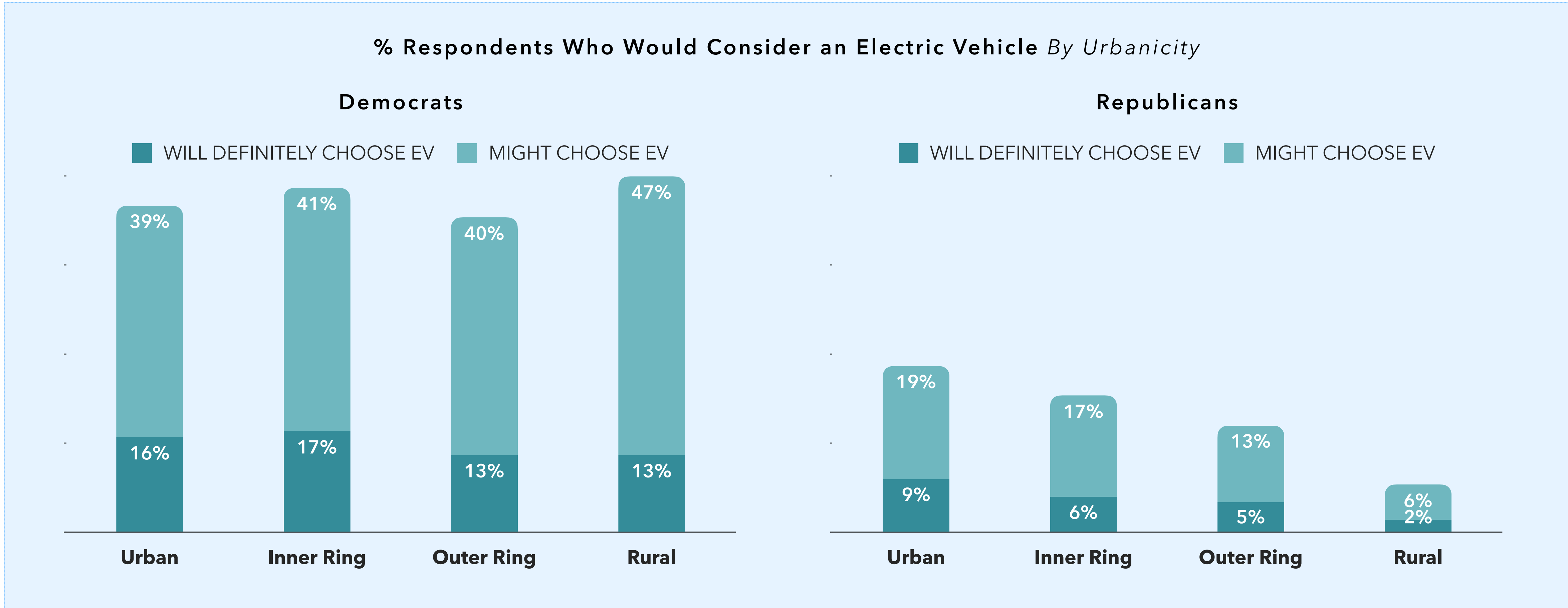
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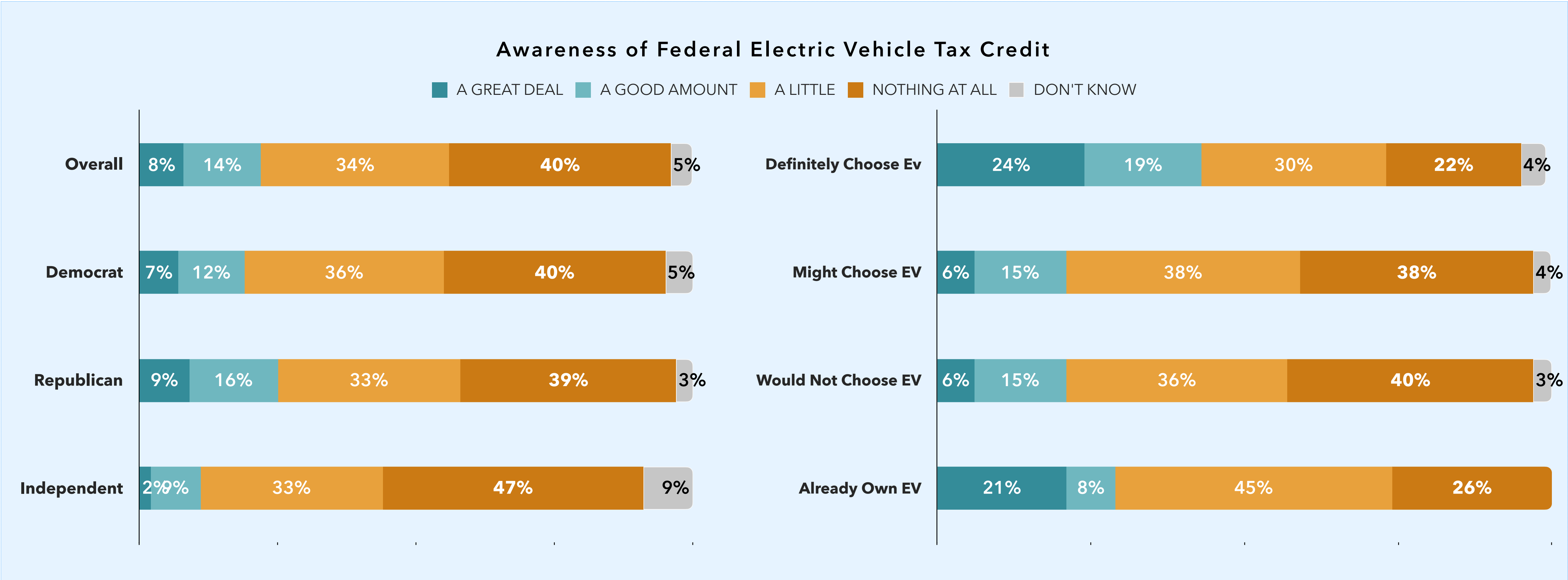
REPUBLICANS WHO LIVE IN URBAN AREAS OR THE INNER SUBURBS ARE MORE LIKELY TO PURCHASE AN ELECTRIC VEHICLE

Nearly a third of Republicans living in urban areas would consider purchasing an electric vehicle compared to just 8% who live in rural areas. This trend does not hold amongst among Democrats as electric vehicle purchase likelihood is relatively stable across urbanicity groups.



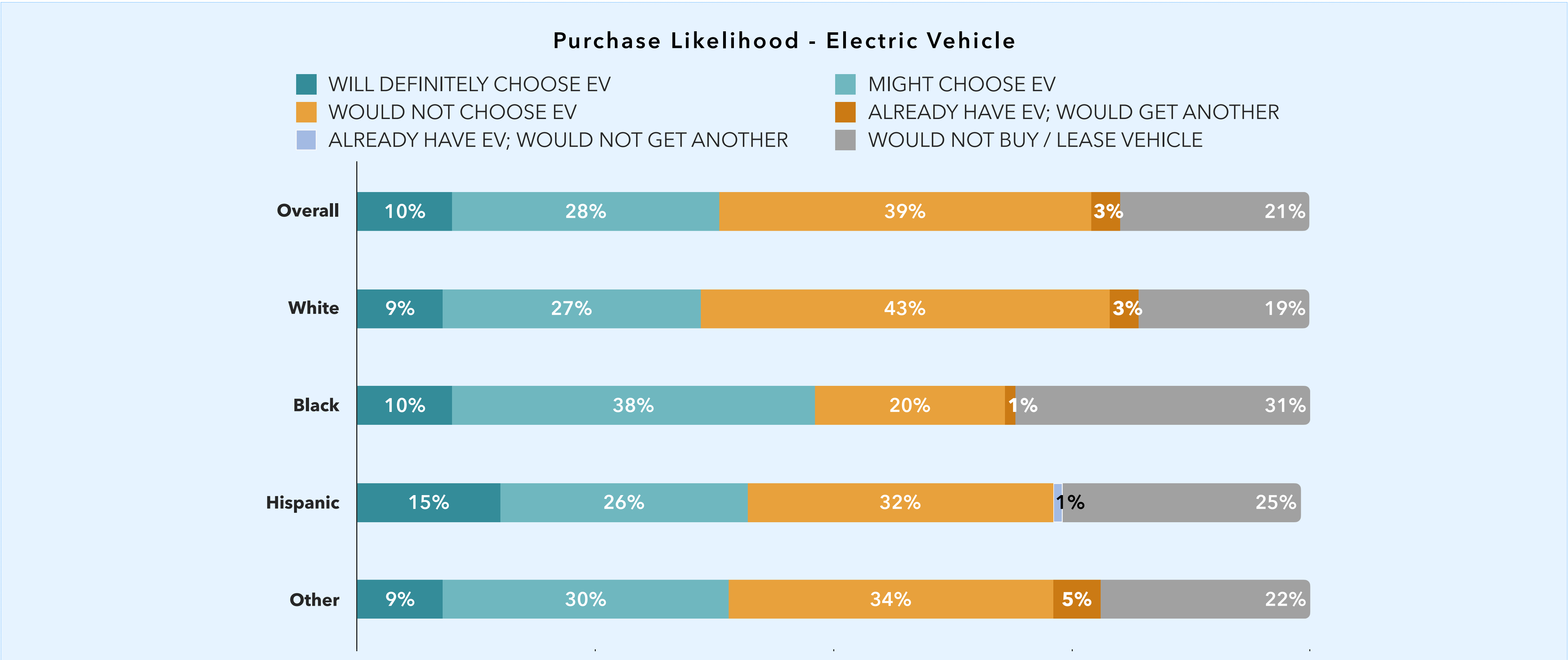
AWARENESS OF THE FEDERAL ELECTRIC VEHICLE TAX CREDIT IS LOW

Only 22% of respondents have heard “a great deal” or “a good amount” about the EV tax credit – with 40% of respondents reporting knowing nothing about it. This is split pretty evenly across party though Independents are less aware than Democrats or Republicans. Americans who are definitely planning to buy an electric car are more aware of the tax credit but awareness is still low amongst those who only *might* choose an electric vehicle.



HISPANIC AMERICANS ARE THE MOST LIKELY TO OPT FOR AN ELECTRIC VEHICLE

Nearly 20% of Hispanic Americans indicate a preference for choosing an electric vehicle as a future purchase, the highest among any racial group. While 38% of Black Americans express interest in potentially purchasing an EV, they also report the highest rate of certainty against purchasing any vehicle.



MOST AMERICANS ACROSS SUBGROUPS ARE LESS AWARE OF EV TAX CREDIT

Black Americans exhibit the lowest awareness of EV tax credit, presenting an opportunity to address hesitation toward EVs.

