



Electric Vehicles Survey

1,016 registered voters nationally and 525 registered voters in
15 Electric Vehicle Investment Congressional Districts*

Conducted February 19-25, 2025

* Electric Vehicle Investment Congressional Districts are defined as the following districts:

AZ-6, CA-13, CA-3, CO-8, ME-2, MI-10, MI-7, MI-8, NC-1, NM-2, NV-3, NY-19, OH-9, PA-10, WI-3

Research Objectives

1

Provide a more accurate and nuanced picture of how Americans think about EVs, countering oversimplified and misleading narratives.

- How many Americans are willing to consider purchasing an EV?
- Do voters support federal investment in EV manufacturing and infrastructure?
- What are voters' top priorities for the future of the auto industry and for EVs?

2

Identify areas of strength in public perception of EVs.

- What do voters see as the primary benefit(s) of EVs?
- What are the most appealing outcome(s) of federal investment in EV manufacturing and infrastructure?
- What are the strongest messages in support of federal EV investment?
- Can voters' feelings toward federal EV investment be separated from their feelings as consumers?

3

Sharing messaging insights with advocates.

- What do voters see as the primary drawback(s) of EVs?
- On what topics does EV messaging need improvement?
- What anti-EV messages resonate most with voters?

Key Takeaways

The Bottom Line: Far from wanting to see the federal government pull back, **American voters solidly endorse** maintaining or expanding federal investments in EV infrastructure and efforts to make EVs more affordable. They believe such investments yield major benefits for consumers, the economy, and the U.S. auto industry.

1

Federal EV investments have broad, bipartisan support, with the greatest intensity around increasing affordability, expanding charging access, and keeping jobs in the U.S. over China.

2

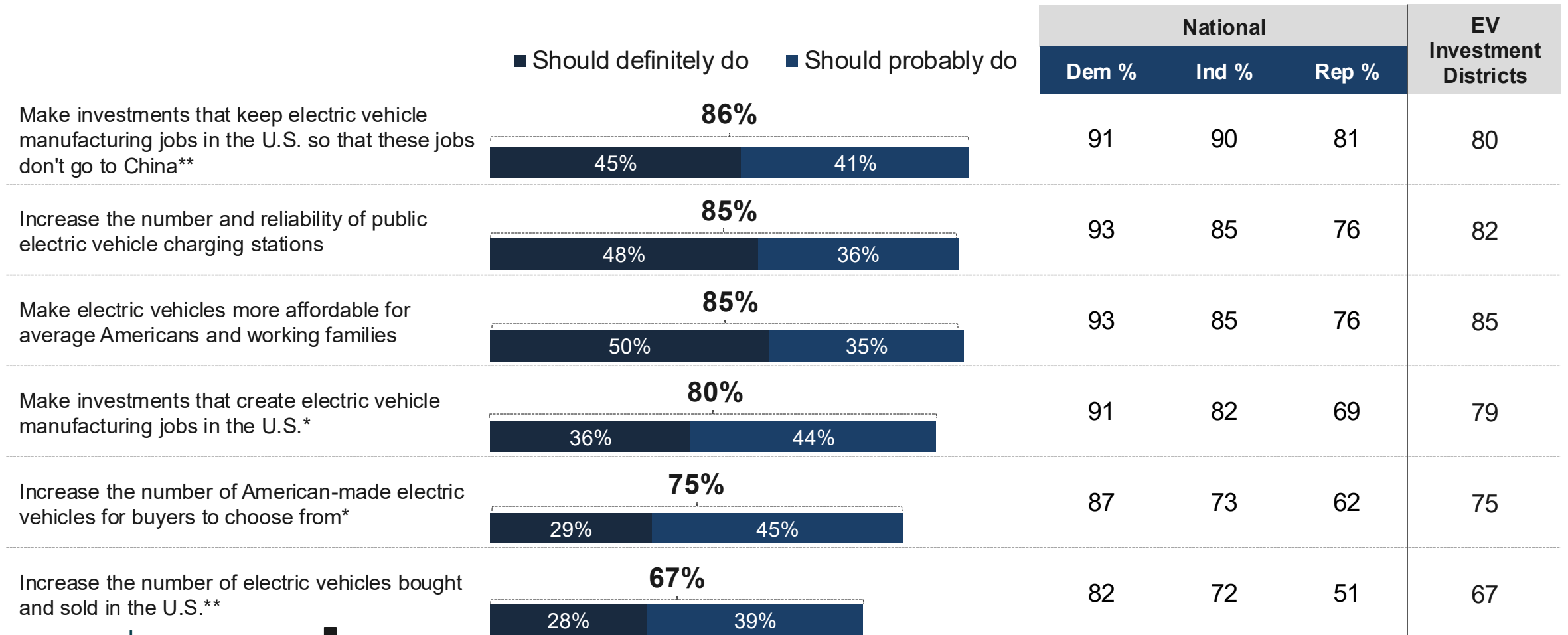
Voters support specific policies to lower EV costs, and boost U.S. manufacturing.

3

The economic case for EVs is powerful and credible to voters.

Voters across the political spectrum support federal EV investments, especially for jobs and affordability.

Do you think the federal government should or should not do each of the following things?



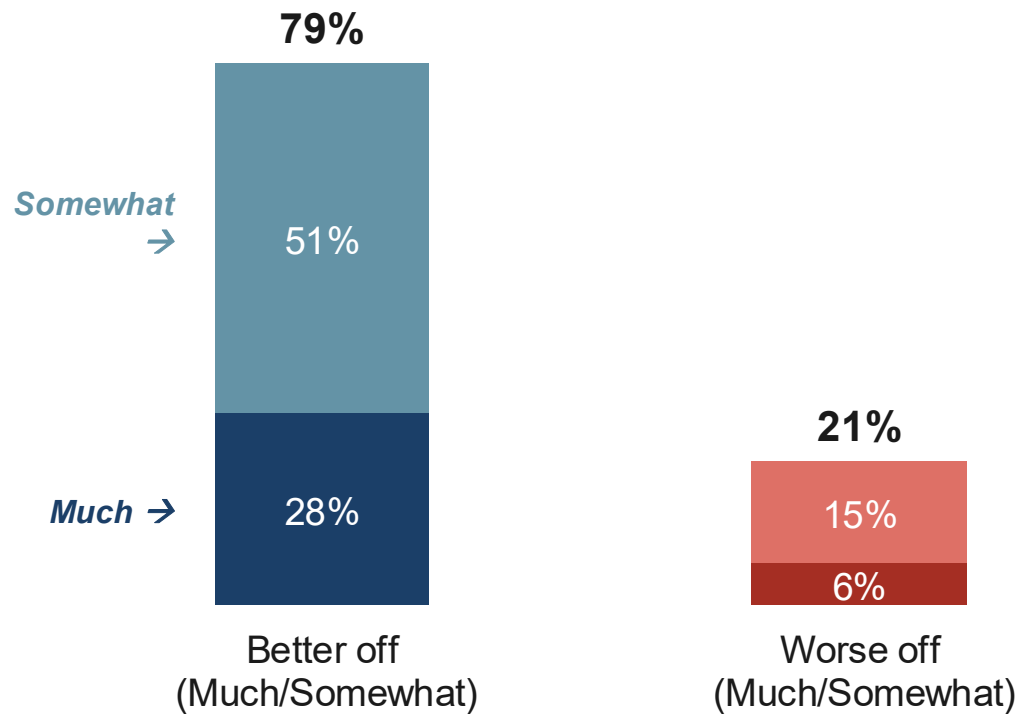
Specific EV policies and goals also draw substantial—but soft—approval.

Below are some policy proposals related to vehicles that the federal government could consider. Please indicate whether you think the federal government should or should not do each one.

	<div> <div>■ Should definitely do</div> <div>■ Should probably do</div> </div>	National			EV Investment Districts
		Dem %	Ind %	Rep %	
Give tax breaks and rebates to help people afford to install electric vehicle chargers at home or at a business	<div>77%</div> <div> <div>35%</div> <div>42%</div> </div>	90	81	63	77
Give tax breaks and rebates to help more Americans afford plug-in hybrid vehicles	<div>76%</div> <div> <div>37%</div> <div>39%</div> </div>	87	80	64	75
Keep the \$7,500 tax break for Americans who buy an electric vehicle**	<div>72%</div> <div> <div>38%</div> <div>34%</div> </div>	88	77	56	68
Give tax breaks to the automakers and manufacturers to build electric vehicles and electric vehicle parts in the U.S.	<div>72%</div> <div> <div>27%</div> <div>44%</div> </div>	81	70	63	70
Strengthen pollution standards to encourage companies to build cleaner and more electric heavy-duty trucks and buses *	<div>71%</div> <div> <div>31%</div> <div>39%</div> </div>	92	66	52	68
Allow states to set their own vehicle pollution standards that are stronger than federal government standards *	<div>62%</div> <div> <div>18%</div> <div>45%</div> </div>	65	67	59	61

Four in five see EV investments as a boost to the U.S. auto industry.

Do you believe that the U.S. auto industry will be better off or worse off if the federal government passes policies that make electric vehicles more affordable and builds more electric vehicle charging stations?

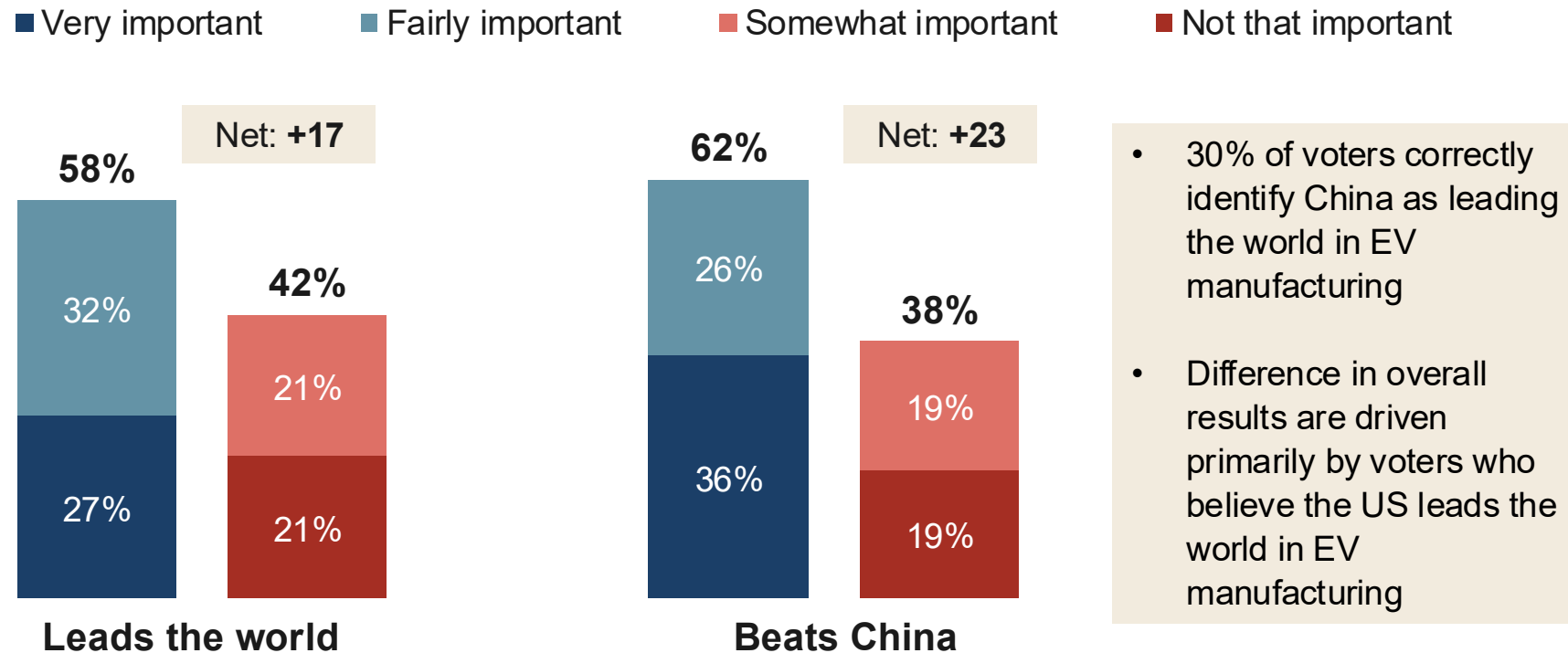


	Better off %	Worse off %
EV Investment CDs	77	23
Democrats	87	13
Independents	78	22
Republicans	72	28
Self-ID MAGA Republicans ⁺	70	30
Non-MAGA Republicans	75	25

⁺ Republicans who self-report as being aligned with the Make America Great Again movement.

Beating China is more important than leading the world in EV manufacturing.

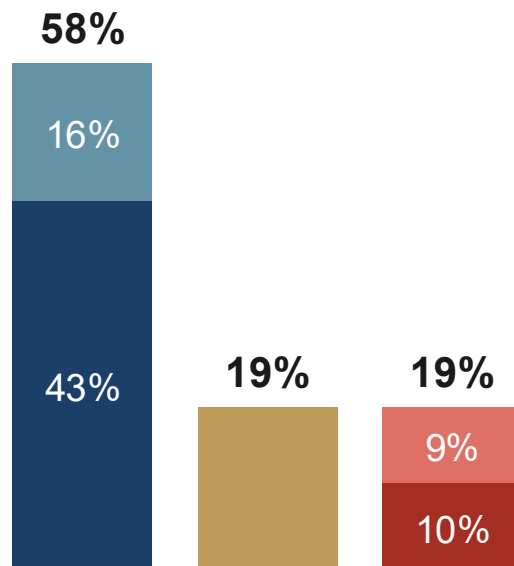
*In your opinion, how important is it to make sure that the United States [FORM A: **leads the world**] [FORM B: **beats China**] in manufacturing electric vehicles?*



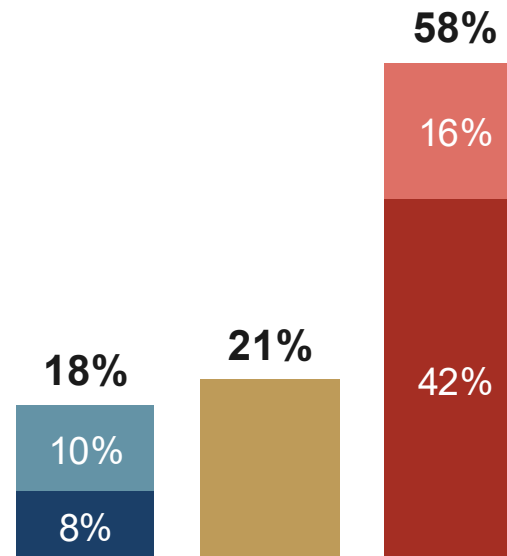
The positive environmental impact of EVs is already baked into many voters' thinking.

Do you think electric vehicles and vehicles that burn gas for fuel are good or bad for the environment?

■ Good for the environment ■ More good than bad ■ Equal ■ More bad than good ■ Bad for the environment



Electric Vehicles



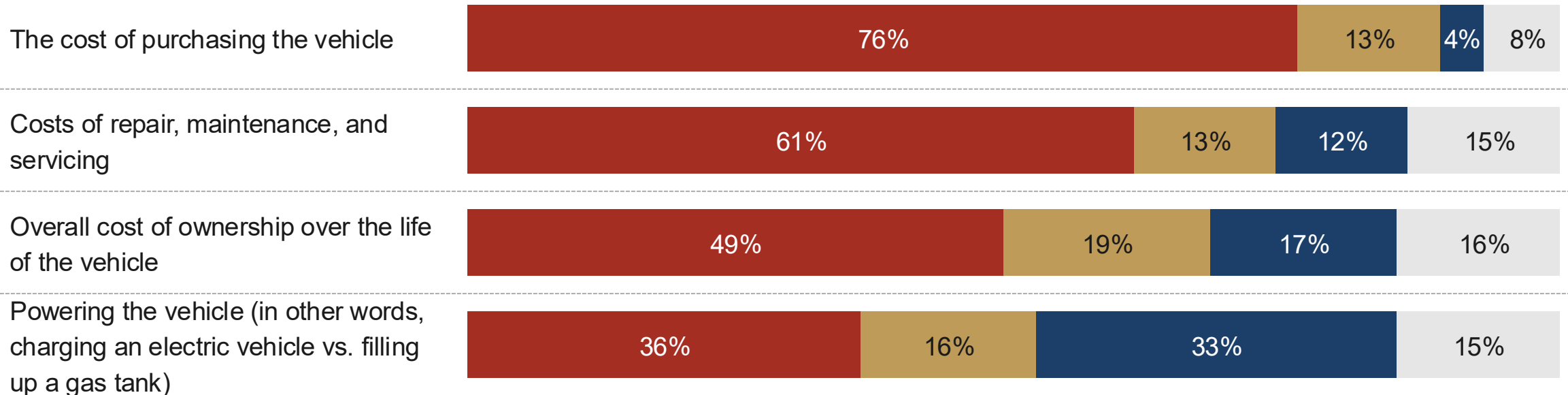
Gas Vehicles

- Environmental benefits (53%) was by far the top favorable impression volunteered in open-ended question

There's widespread belief that EVs cost more than gas cars—especially on sticker price and repairs—and many doubt fuel savings will make up the difference.

Do you think electric vehicles are more expensive, cost about the same, or are less expensive than gas-powered cars?

■ EV more expensive ■ Cost about the same ■ EV less expensive ■ Don't know



Majority (53%) still say EVs are more expensive to purchase than gas-powered cars, even after government rebates are included.

Full Wording: Pro-EV Information

The federal government should support American companies that make affordable, powerful electric vehicles built by American workers.

Investing in electric vehicle manufacturing and infrastructure creates good jobs. From advanced battery production to engineering and assembling next-generation cars, American-made electric vehicles create stable, good-paying jobs for working-class Americans.

Investing in electric vehicle manufacturing and infrastructure gives Americans more choices, so that electric vehicles and plug-in hybrids are accessible to people at different budget levels.

Increasing the number of electric vehicles on the road reduces air pollution, leading to reduced risk of health problems like asthma and heart disease.

Other countries like China, Japan, and South Korea are investing heavily in electric vehicle manufacturing. If the U.S. doesn't, we will fall behind in the global auto industry.

Investing in electric vehicle manufacturing and infrastructure strengthens America's energy independence so that more cars are made in America and powered by American energy.

If the U.S. fails to invest in electric vehicle manufacturing, China will seize the opportunity--costing American jobs and strengthening China's economy at our expense.

Investing in electric vehicle manufacturing and infrastructure means we need less gasoline, which makes the United States more energy independent, and less reliant on foreign oil.

The federal government should support American companies, like Elon Musk's Tesla, that make affordable, powerful electric vehicles built by American workers.

Cutting investments in electric vehicle manufacturing and infrastructure would mean that Americans have fewer choices when they want to buy a car.

Electric vehicles are cheaper for Americans to own because drivers are protected from high gasoline prices.

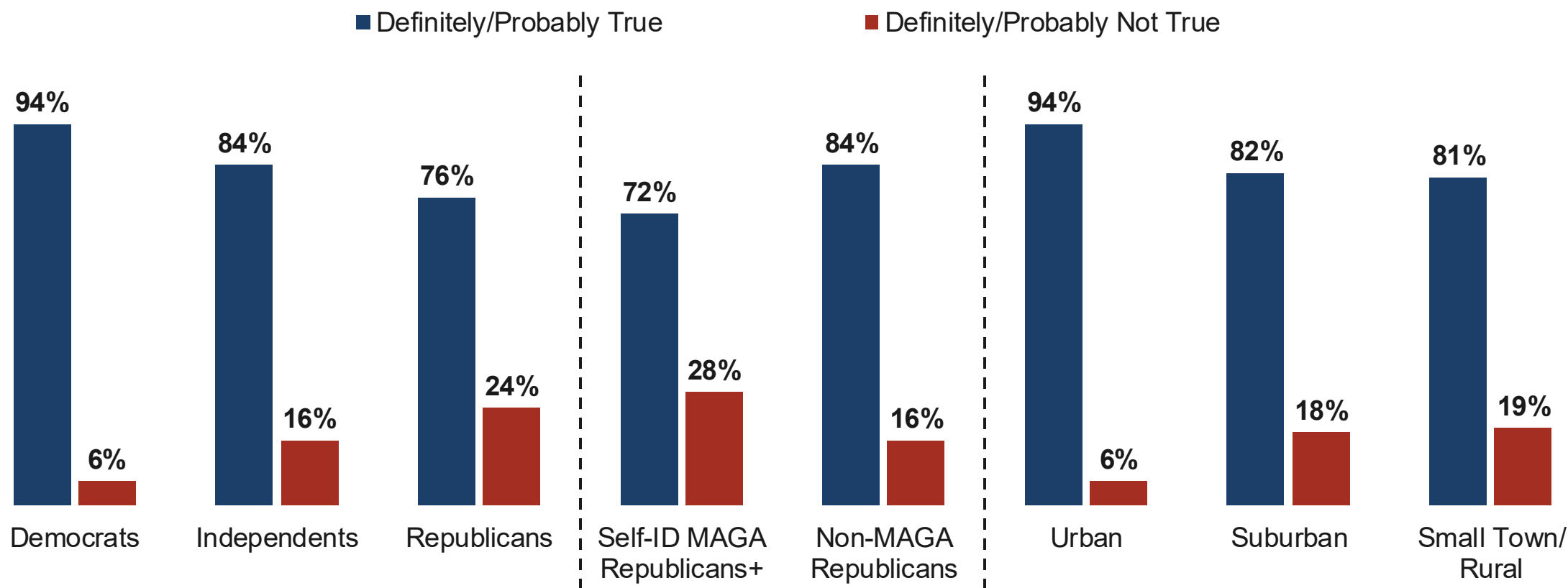
Voters Receptive to Pro-EV Information

Next are some reasons that people might give for why the federal government should support the growth and development of electric vehicles in the United States. Please indicate whether you believe each one is true or not true.

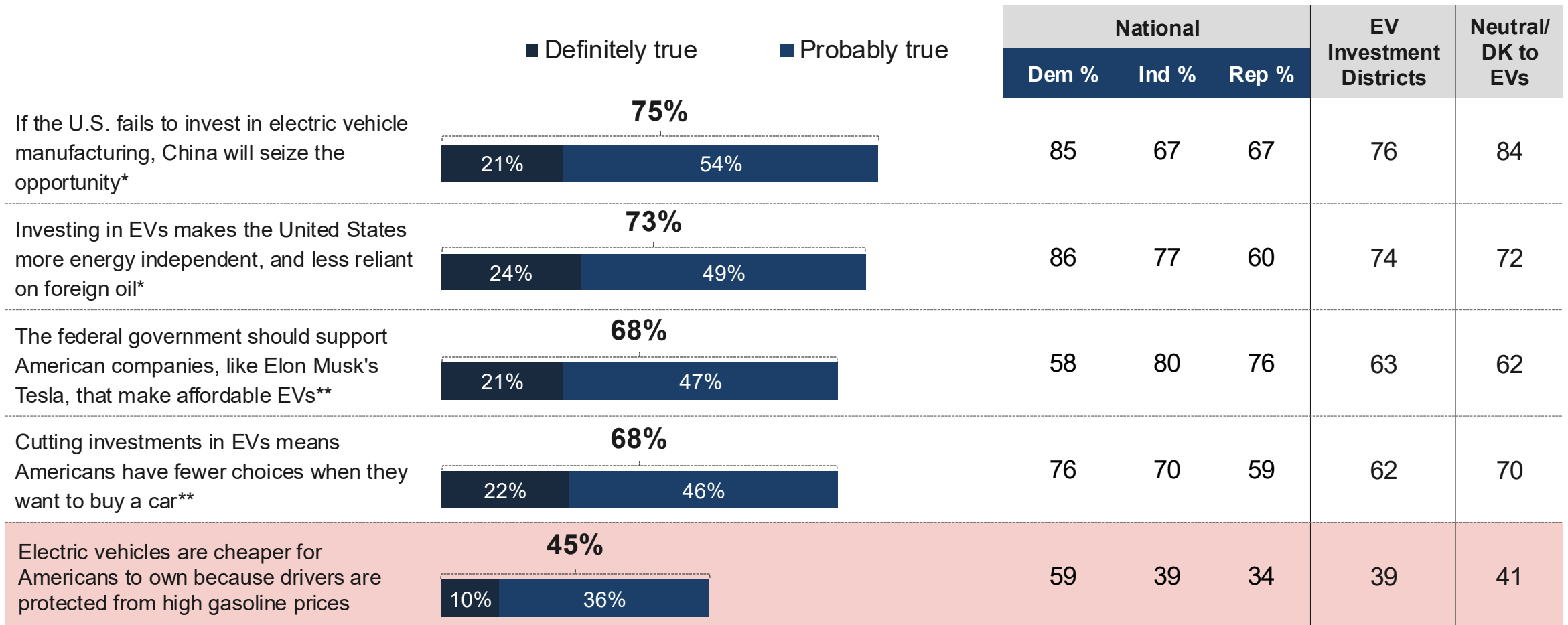
	<div> <div>■ Definitely true</div> <div>■ Probably true</div> </div>	National			EV Investment Districts
		Dem %	Ind %	Rep %	
Federal govt should support American companies and workers that make affordable EVs	<div>85%</div> <div> <div>35%</div> <div>50%</div> </div>	94	84	76	81
Investing in EV manufacturing and infrastructure creates good jobs	<div>83%</div> <div> <div>29%</div> <div>54%</div> </div>	90	85	75	79
Investing in EV manufacturing and infrastructure gives consumers more choices*	<div>81%</div> <div> <div>23%</div> <div>58%</div> </div>	90	83	72	77
U.S. is at risk of falling behind countries like China, Japan, and South Korea**	<div>75%</div> <div> <div>31%</div> <div>45%</div> </div>	82	82	68	71
Investing in EVs strengthens America's energy independence**	<div>75%</div> <div> <div>24%</div> <div>52%</div> </div>	81	82	68	77

Support for American EV Manufacturers and Workers is strong and bipartisan.

The federal government should support American companies that make affordable, powerful electric vehicles built by American workers.



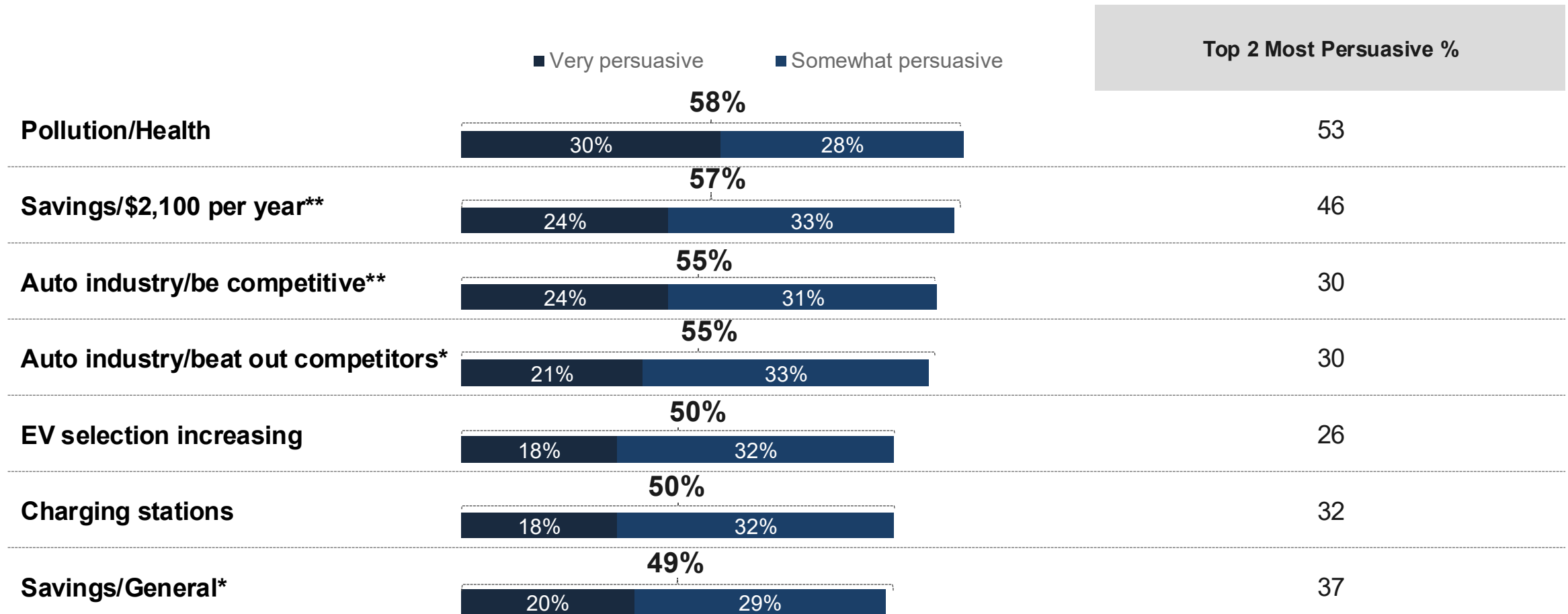
But messaging on cost savings needs significant improvement.



Full Wording: EV Messaging

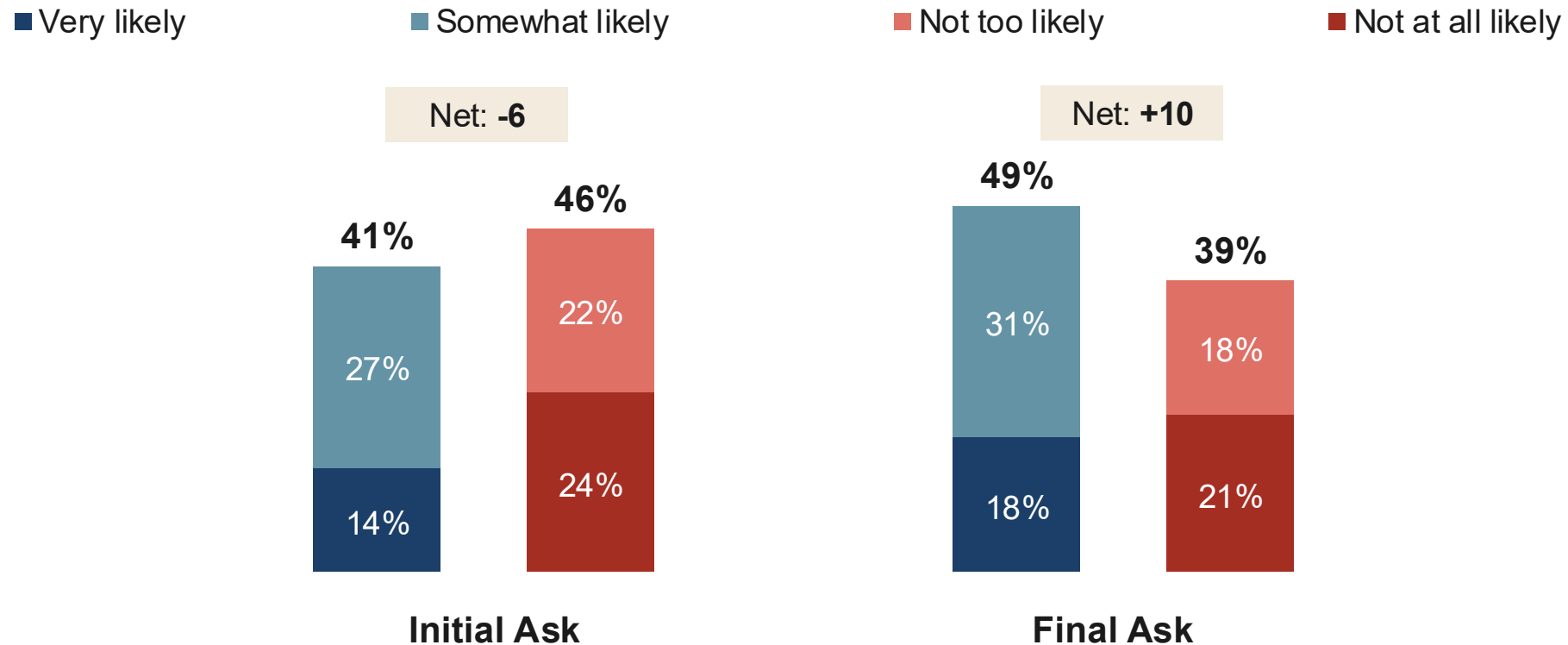
Pollution/Health	Unlike gas-powered cars, electric vehicles release no air pollution. The more electric vehicles we have on the road, the cleaner our air will be, which could result in tens of thousands of lives being saved and more than two million asthma attacks.
Savings/\$2,100 per year	Because electric vehicles use electricity which costs less than gasoline, electric vehicle drivers save as much as \$2,100 per year in fuel savings.
Auto industry/be competitive	Consumers are going to buy more and more electric vehicles in the coming years. We need to make sure the American auto industry is competitive with automakers from other regions, including China.
Auto industry/beat out competitors	Consumers are going to buy more and more electric vehicles in the coming years. We need to make sure the American auto industry is able to beat out competitors in China for those sales.
EV selection increasing	The number of electric vehicle models for buyers to choose from is increasing rapidly, as 75 new electric vehicle models are scheduled to be released over the next few years.
Charging stations	The number of electric vehicle charging stations in the U.S. has doubled over the past four years and is expected to reach 500,000 by 2030 with current investments. Plus, most states are building their own charging networks.
Savings/General	People who drove electric vehicles saved money throughout 2024 when compared to people who drove gas-powered cars.

Making the cost case for EVs is essential; our messages on cost need to be stronger, but specificity of savings helps.



Half of voters would consider purchasing an EV after messaging.

Based on what you have read, the next time you buy or lease a vehicle, how likely are you to seriously consider buying or leasing an electric vehicle?



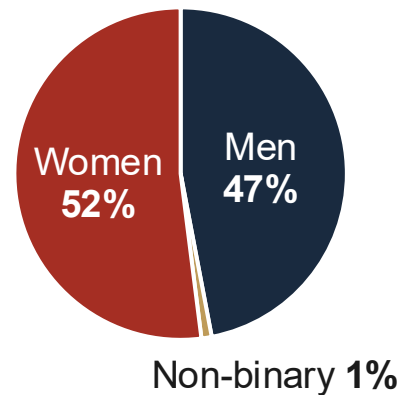
Industry experts, scientists, and community members are the most trusted sources for information about EVs.

	All voters	Democrats %	Independents %	Republicans %	Self-ID MAGA Republicans %	Non-MAGA Republicans %
Auto industry experts	45%	51	45	39	33	49
Scientists	35%	48	40	21	17	29
Neighbors, friends, and family	23%	18	20	29	28	30
Elon Musk	22%	7	14	38	48	20
Cable news channels like Fox News, CNN, and MSNBC	21%	22	13	23	26	19
Your local car dealer	15%	17	14	14	12	16
Donald Trump	15%	1	5	30	39	13
State leaders like your governor or local mayor	10%	13	7	8	7	10
Social media personalities and influencers	10%	10	8	10	11	8
Podcasters and other online personalities	10%	7	12	12	15	5
Your local member of Congress	6%	8	5	4	4	4
None of these	13%	12	19	13	12	16

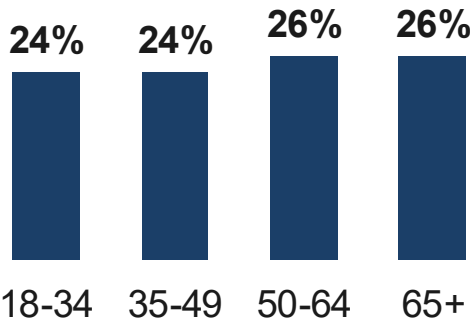
APPENDIX

Profile of the Sample

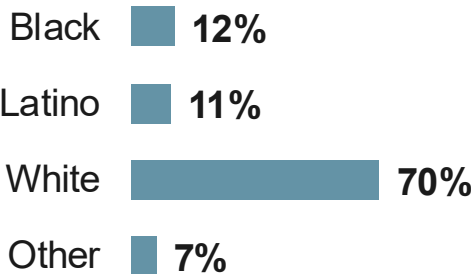
Gender



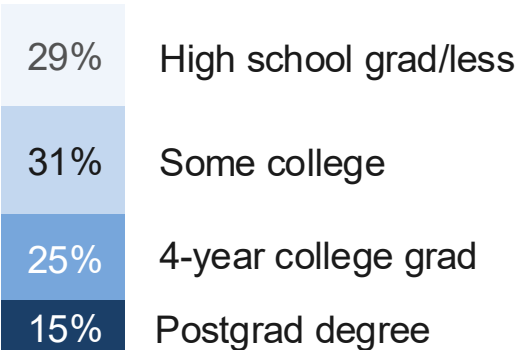
Age



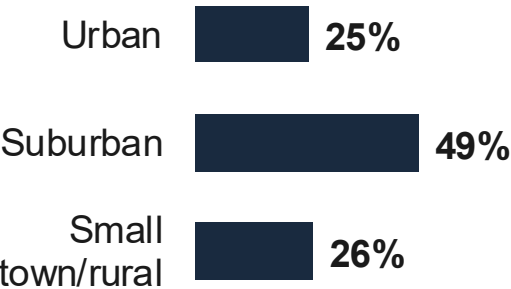
Race



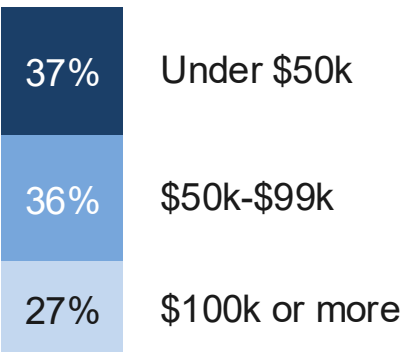
Education



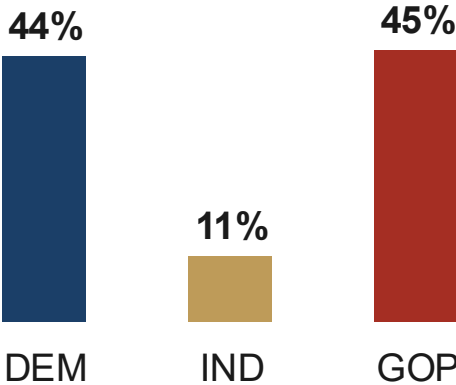
Area Type



Income



Party ID



2024 Vote

