

# Environmental Polling Consortium Quarter 4 Briefing

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Presented by:  
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# Survey Methodology

Sample of 2,490 U.S. Adults aged 18+ using web panel respondents with quota based recruitment procedure

Fielded using online panel from Nov 24, 2024 – Dec 6th, 2024

Weighted to population of U.S. Adults aged 18+ on age, race, gender, Hispanic ethnicity, educational attainment, and census region using the U.S. American Community Survey 2022 5 year estimates. The data for race were weighted based on the U.S. Decennial Survey. For more information on methodology, please visit [www.northwindclimate.com](http://www.northwindclimate.com)

MOE: +/- 2 %\*

\*Results for subgroups of the sample are subject to increased margins of error

TABLE 1: WEIGHTED & UNWEIGHTED FREQUENCY OF DEMOGRAPHICS USED FOR SAMPLE WEIGHTS

Demo	Weighted	Unweighted
<b>Age</b>		
age: 18-24	12%	13%
age: 25-34	18%	16%
age: 35-44	17%	15%
age: 45-64	32%	33%
age: 65+	21%	22%
<b>Race</b>		
race: white	64%	67%
race: black	12%	12%
race: other	24%	21%
<b>Gender</b>		
gender: female	51%	52%
gender: male	49%	48%
<b>Hispanic</b>		
hispanic: yes	12%	20%
hispanic: no	88%	80%
<b>Education</b>		
education: lessthanbachelors	68%	60%
education: bachelors	20%	26%
education: advanced	12%	14%
<b>Census Region</b>		
census: northeast	17%	17%
census: midwest	22%	21%
census: south	38%	37%
census: west	23%	24%



# Segmentation Model Methodology

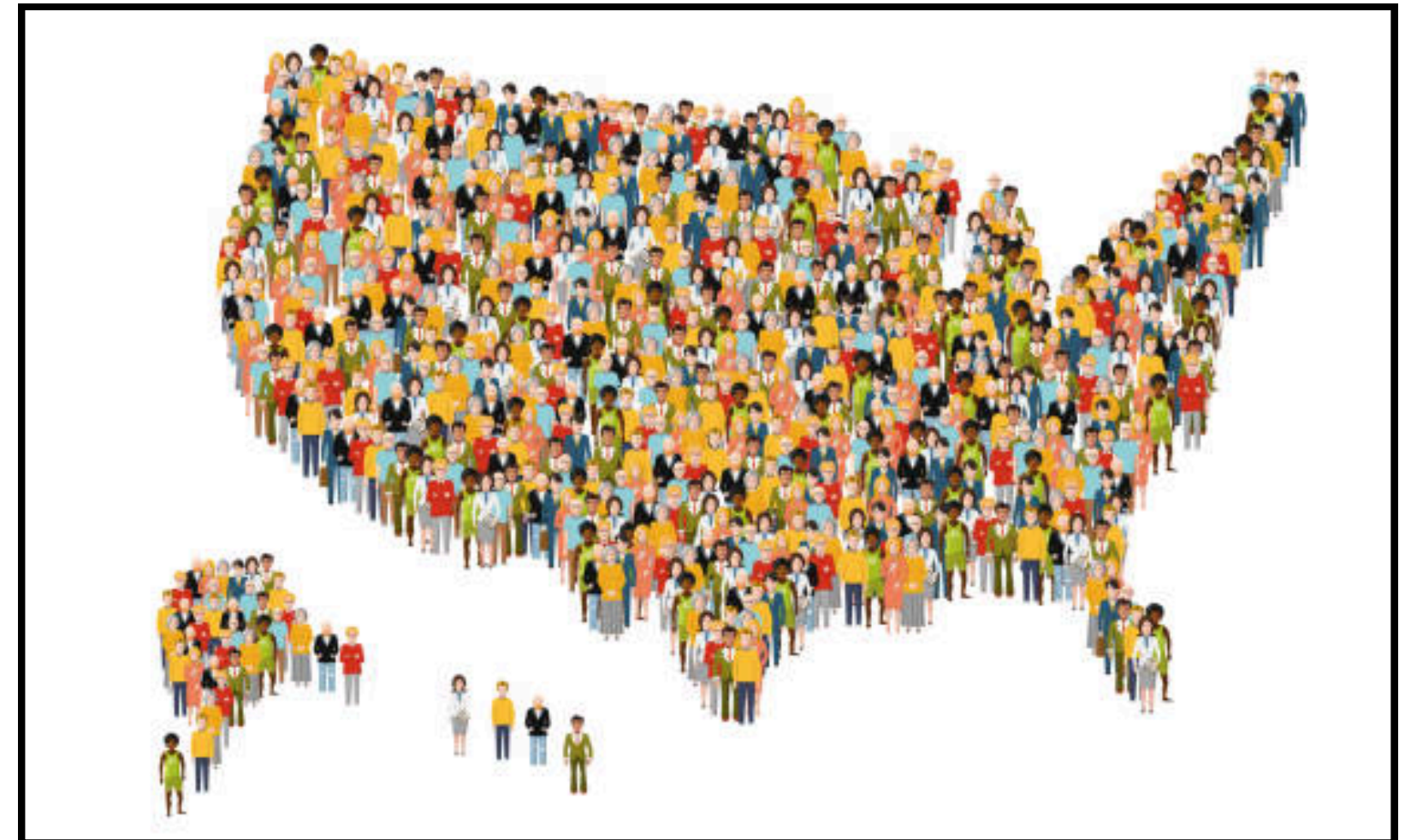
## Climate Value Model

Northwind Climate's Climate Value model uncovers hidden subgroups within a population by analyzing shared characteristics and attitudes of survey respondents.

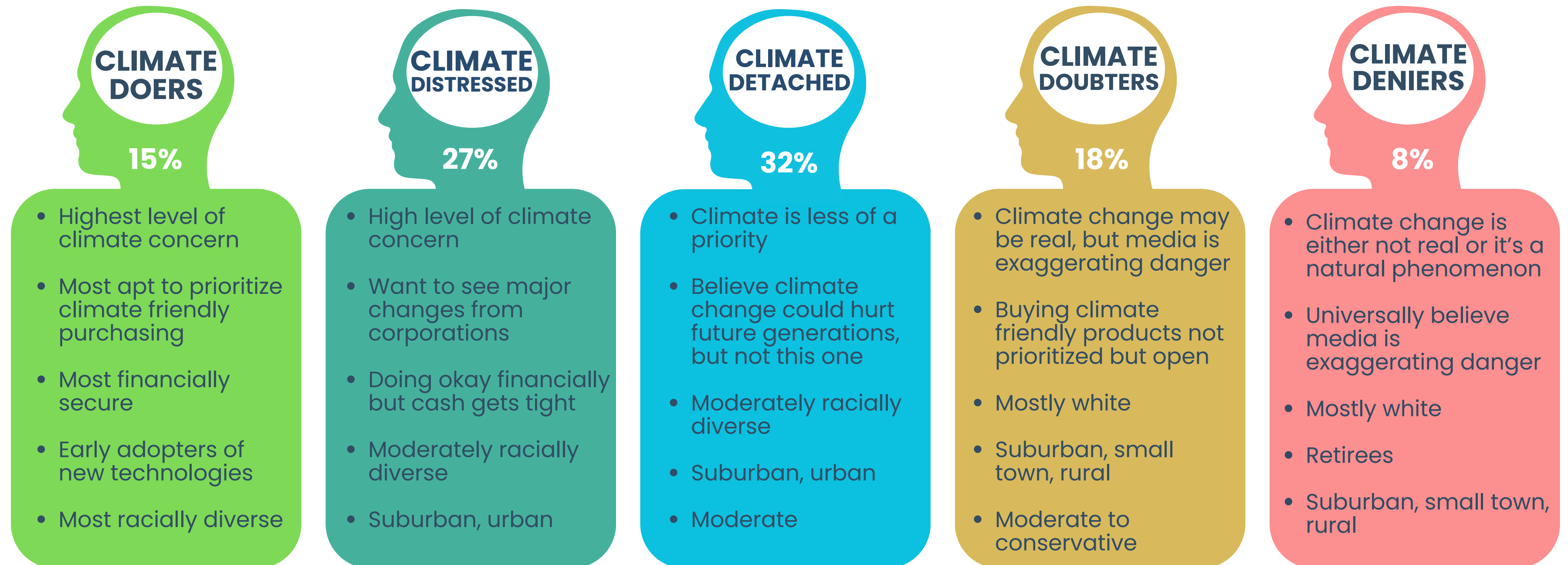
This approach recognizes that people understand social domains like climate change through unique configurations of beliefs and values. Our segmentation models help people go beyond demographic analysis to identify patterns that drive behaviors, such as adopting EVs or climate technology solutions.

NWC builds onto its model each month for robustness.

For more information please visit [www.northwindclimate.com](http://www.northwindclimate.com)



## Five “climate” groups of the U.S population



These segments are better predictors of consumer behavior around climate issues than demographics or political measures alone



# Key Insights

1

## EV's Don't Meet "Lifestyle" Expectations Yet

1 in 2 are at least somewhat likely to consider purchasing an EV

But, 4 in 10 express lifestyle concerns

2

## Knowledge Gaps Persist & Discussions Around Cost Are Nuanced

Most are aware that EV's are better for climate, and have lower fuel.

6 in 10 correctly believe ICE vehicles cost less upfront

But only 3 in 10 recognize EV's have lower lifetime costs

3

## Bipartisan Support For EV Rebates

Majorities of both democrats and republicans (56% vs. 71%) believe the EV tax credit should be at least \$7,500 at the federal level

Removing the credit would reduce interest in EV's for the majority of respondents

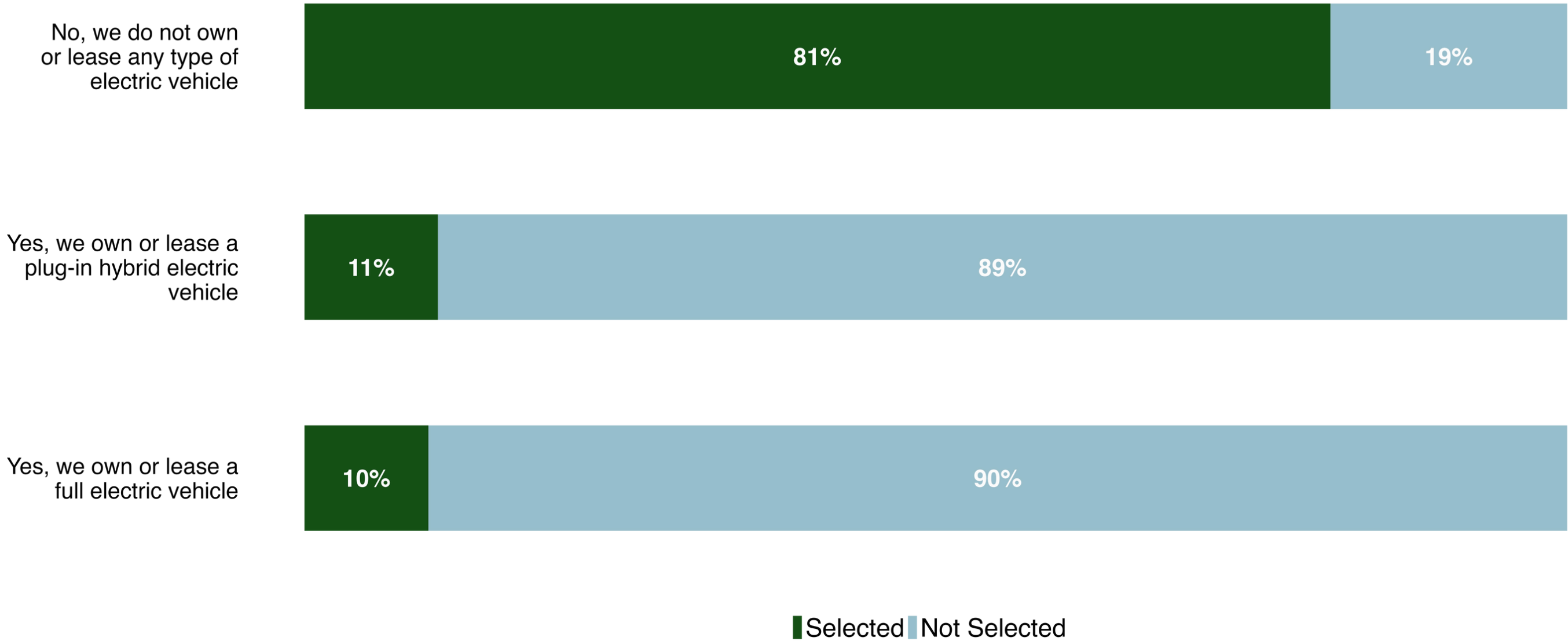
Partisan gap in net support for state-level rebates (+28 vs. -6)

# Section 1: Landscape of Electric Vehicles



# Only 1 in 10 currently own a fully electric vehicle

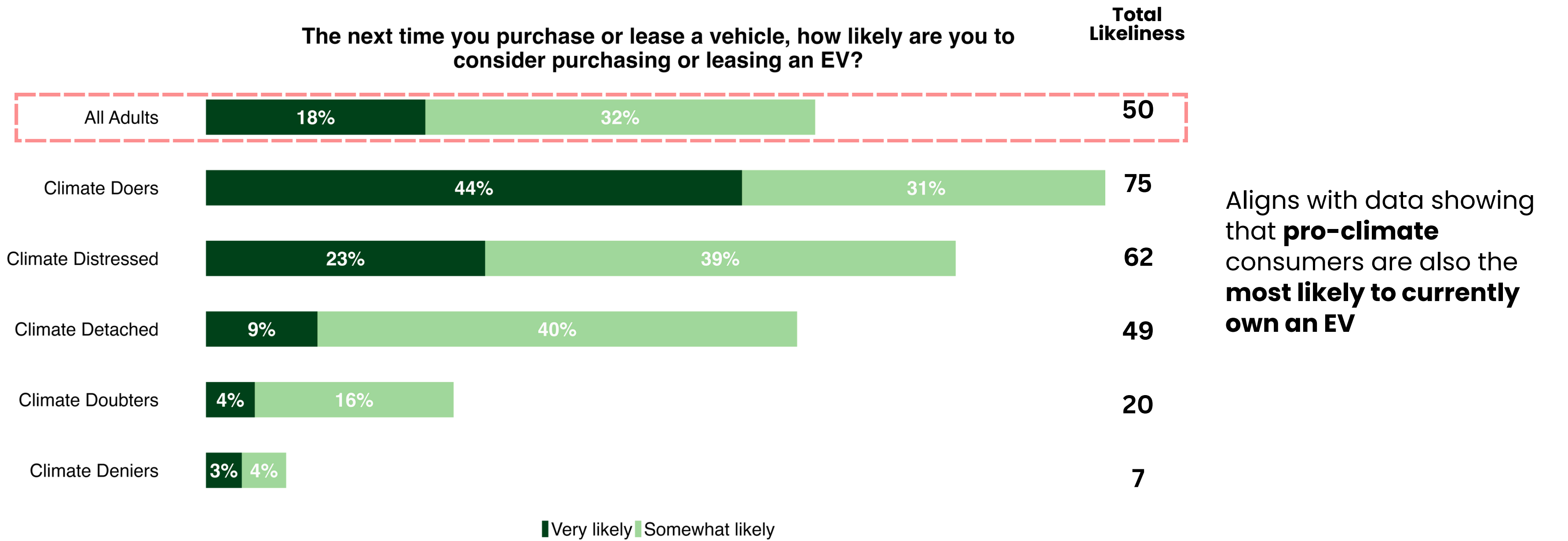
Do you currently own or lease an electric vehicle (including plug-in hybrids, and full electric vehicles)? Please select all that apply.



SOURCE: NORTHWIND CLIMATE RESEARCH NOV. 2024



# 1 in 2 are open to EVs, including nearly half of climate "detached" who believe that climate is less of a priority

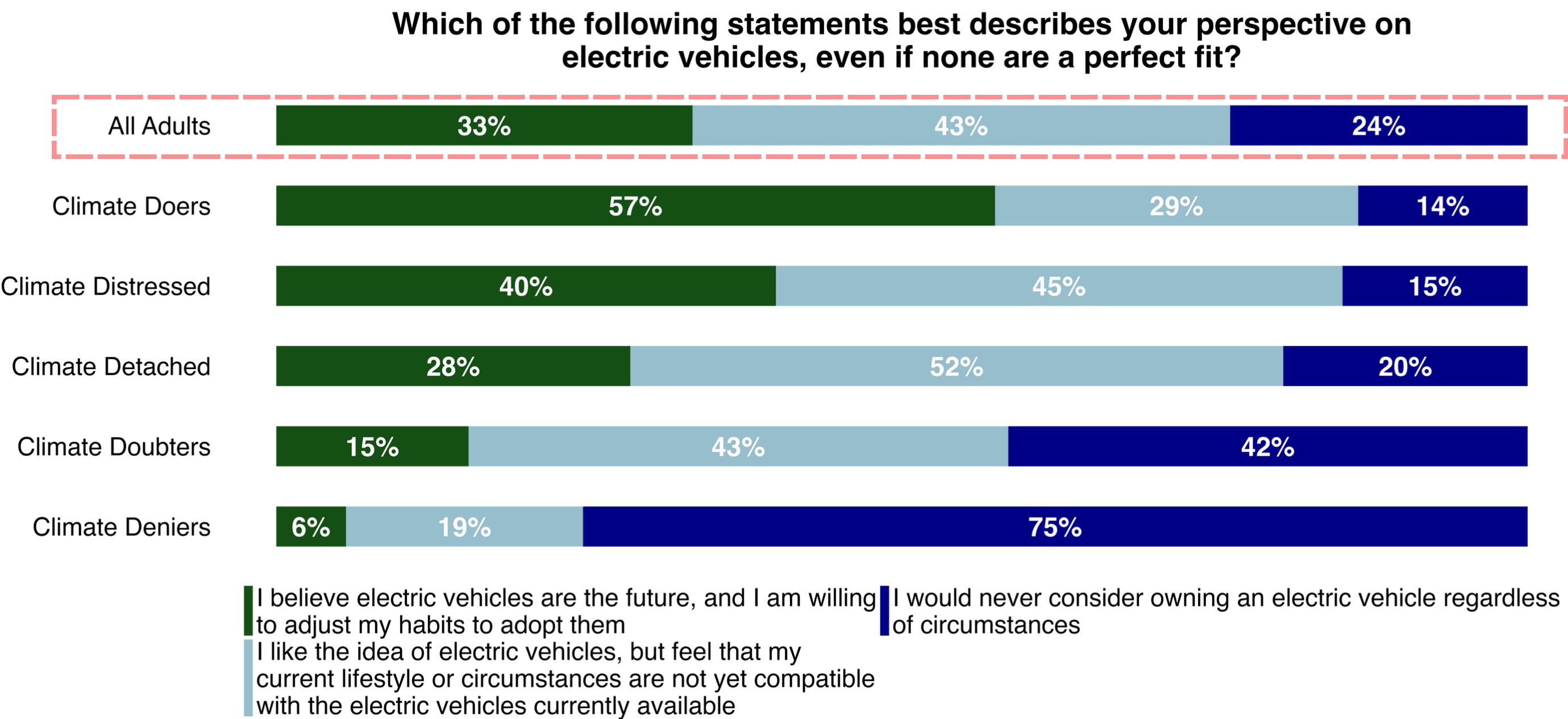


SOURCE: NORTHWIND CLIMATE RESEARCH NOV. 2024





# 1 in 3 respondents are open to adjusting habits for an EV, while 1 in 4 find EVs incompatible with their lives, despite favorable attitudes

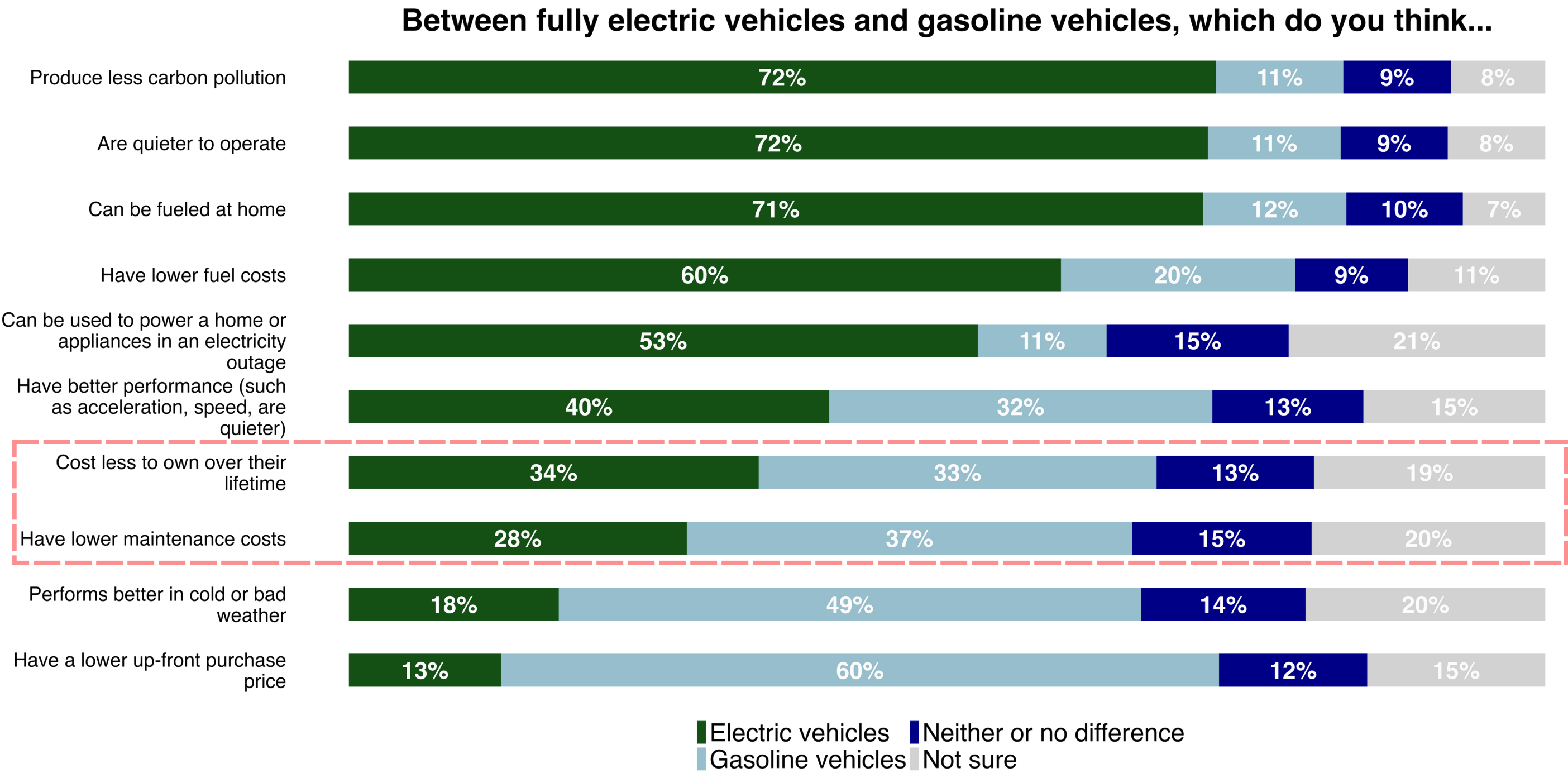


SOURCE: NORTHWIND CLIMATE RESEARCH NOV. 2024



## Section 2: EV Knowledge Gaps

# Most recognize EVs’ fuel savings, but there’s a significant knowledge gap around their lower lifetime ownership, and maintenance costs

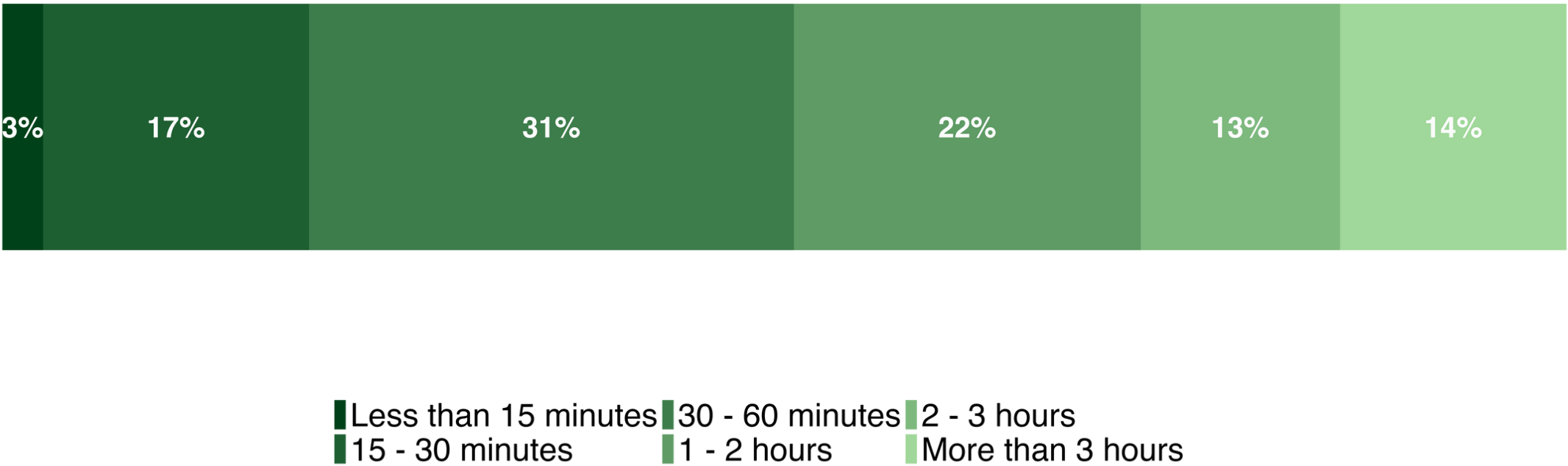


SOURCE: NORTHWIND CLIMATE RESEARCH NOV. 2024



# Nearly 1 in 2 believe that charging an EV at a public fast charger takes longer than an hour

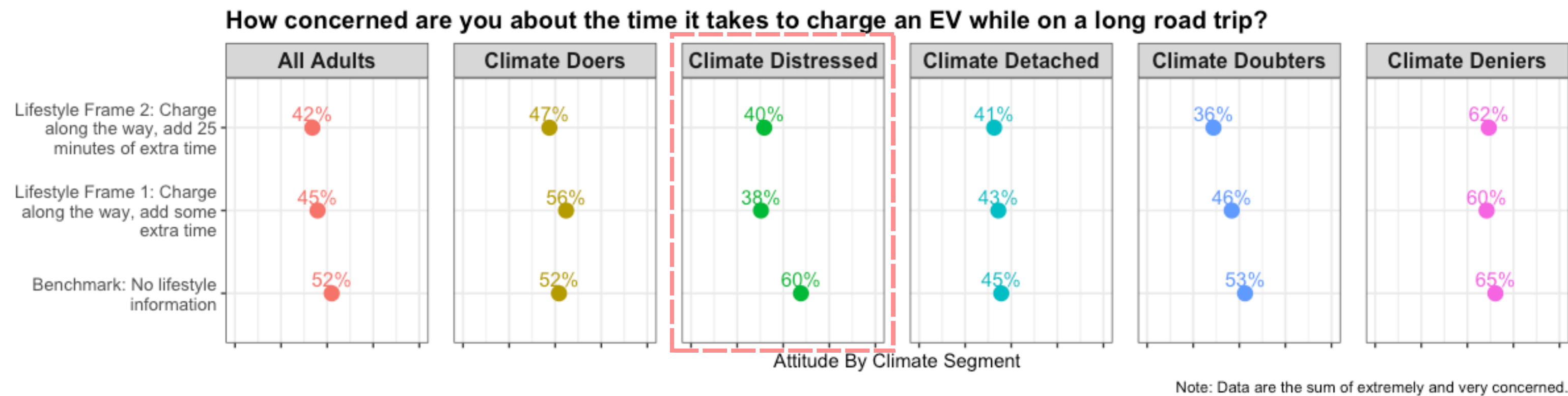
How long do you think it takes to charge a fully electric vehicle to near full battery capacity using a public fast charger? If you do not know, just give your best guess.



SOURCE: NORTHWIND CLIMATE RESEARCH NOV. 2024



# Concerns about EV charging on roadtrips decline when you address lifestyle concerns



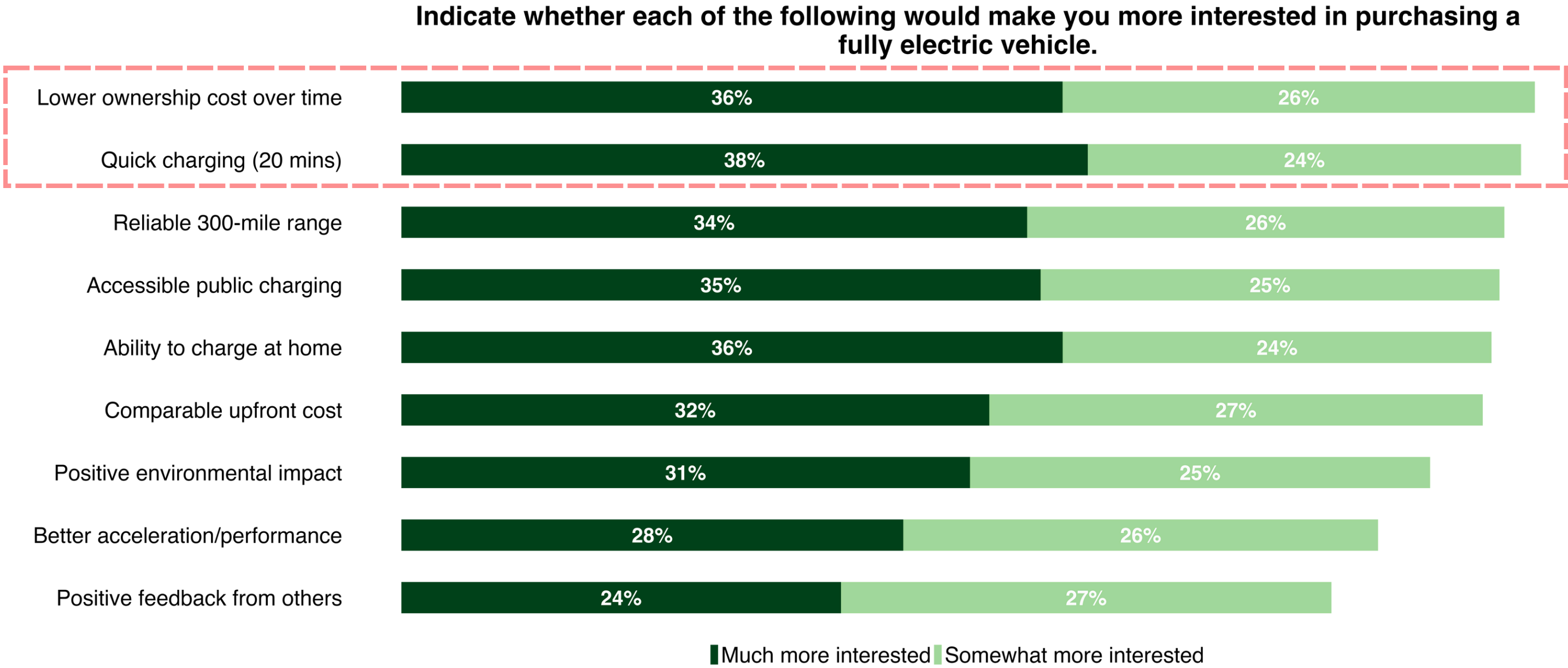
Insights:

- For “All Respondents”, providing lifestyle information reduced concerns about how much time charging adds to road trip.
- For Climate Distressed (the 2nd largest respondent category), concerns declined by over 20% when given lifestyle adjustments frame.
- For Climate Deniers, neither frame made meaningful reductions in levels of concern (5% between benchmark and lifestyle 1).

SOURCE: NORTHWIND CLIMATE RESEARCH NOV. 2024



# Over 6 in 10 would be much more interested in an EV if they knew that lifetime ownership costs were lower than ICE and EV could charge in 20 minutes



SOURCE: NORTHWIND CLIMATE RESEARCH NOV. 2024



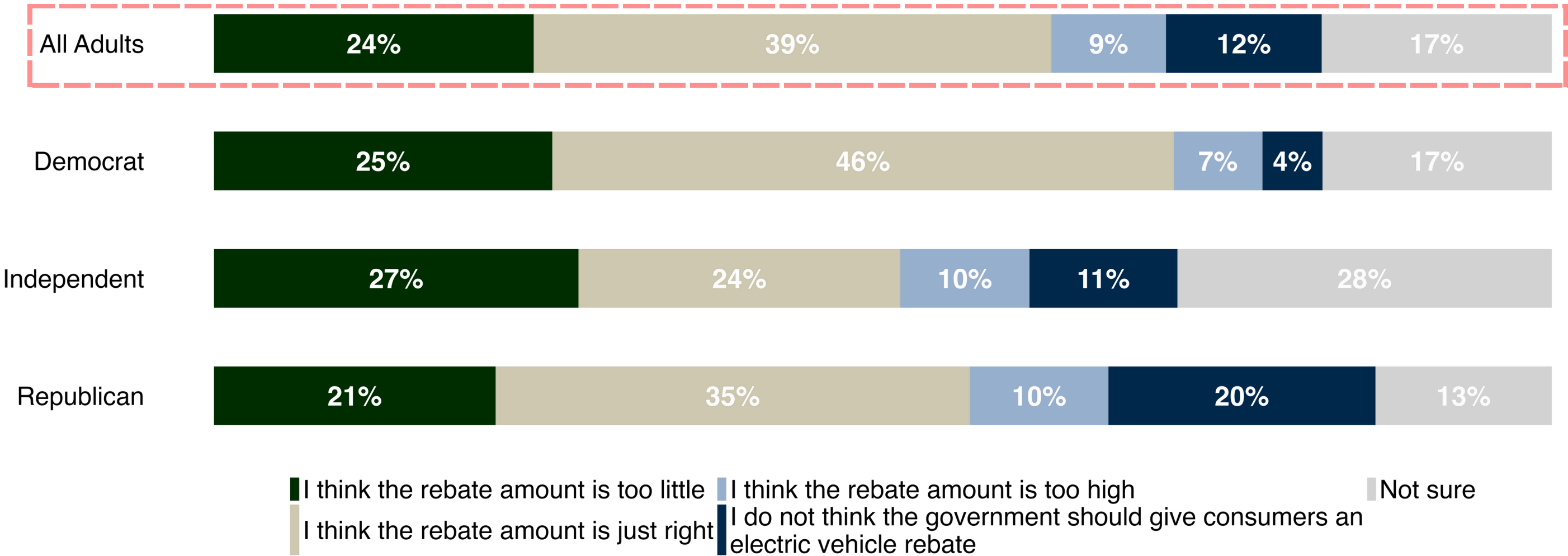


## **Section 3**

# **Inflation Reduction Act (IRA) & EV's**

# Bipartisan majority (56% democrat vs. 71% republican) believe the EV tax credit should be at least \$7,500 at the federal level

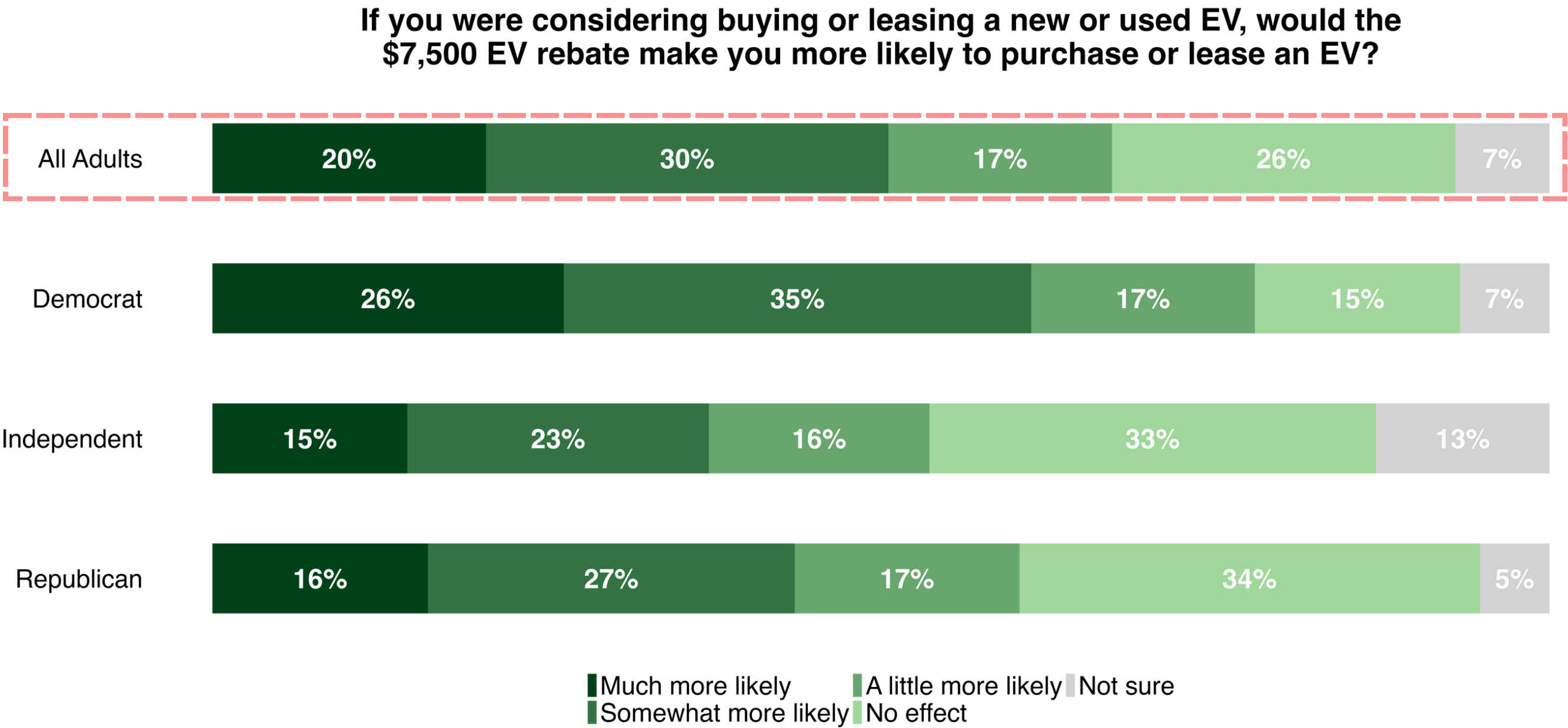
As you may know, the Inflation Reduction Act (IRA) was a bill passed by congress to invest in U.S. clean energy. The IRA includes a \$7,500 rebate to lower the upfront cost of buying or leasing a new electric vehicle, directly reducing the sticker price. Do you think that the rebate amount is too high, too little, or just right?



SOURCE: NORTHWIND CLIMATE RESEARCH NOV. 2024



# 1 in 2 say the EV rebate increases their likelihood of purchasing an EV, with the strongest impact among Democrats

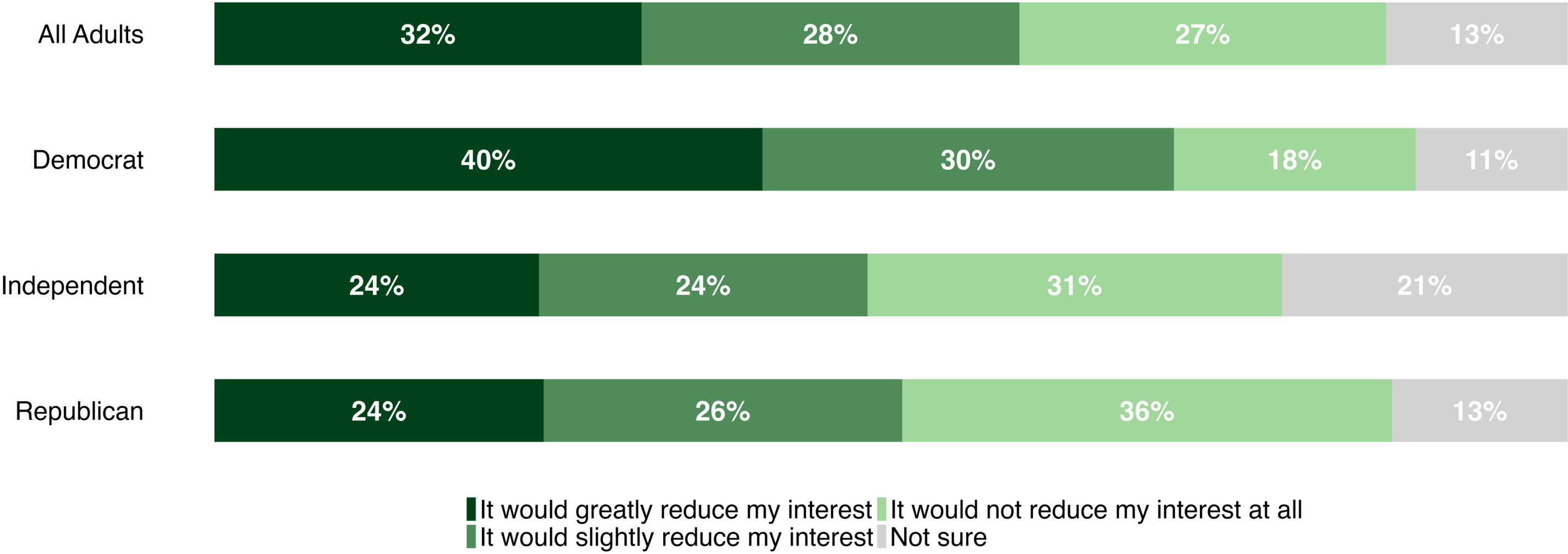


SOURCE: NORTHWIND CLIMATE RESEARCH NOV. 2024



# 1 in 3 say that eliminating the \$7,500 would *greatly* reduce their interest in EV's

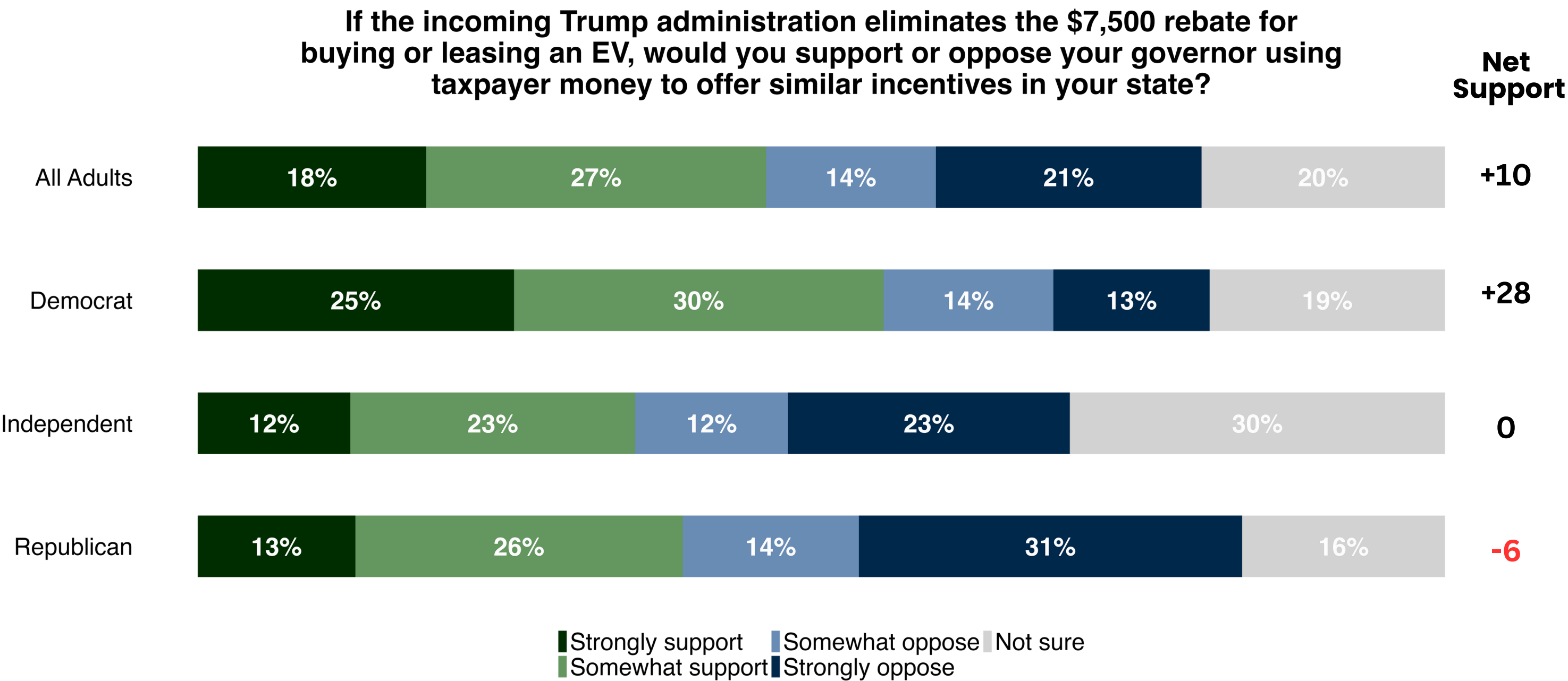
The incoming Trump administration has proposed eliminating the \$7,500 rebate for buying or leasing an electric vehicle. If this rebate were no longer available, how would it affect your decision to consider an electric vehicle for your next purchase or lease?



SOURCE: NORTHWIND CLIMATE RESEARCH NOV. 2024



# Democrats support state-funded EV rebates if federal incentives are cut, while Republicans and Independents show little to no support



SOURCE: NORTHWIND CLIMATE RESEARCH NOV. 2024





# Thank you!

