

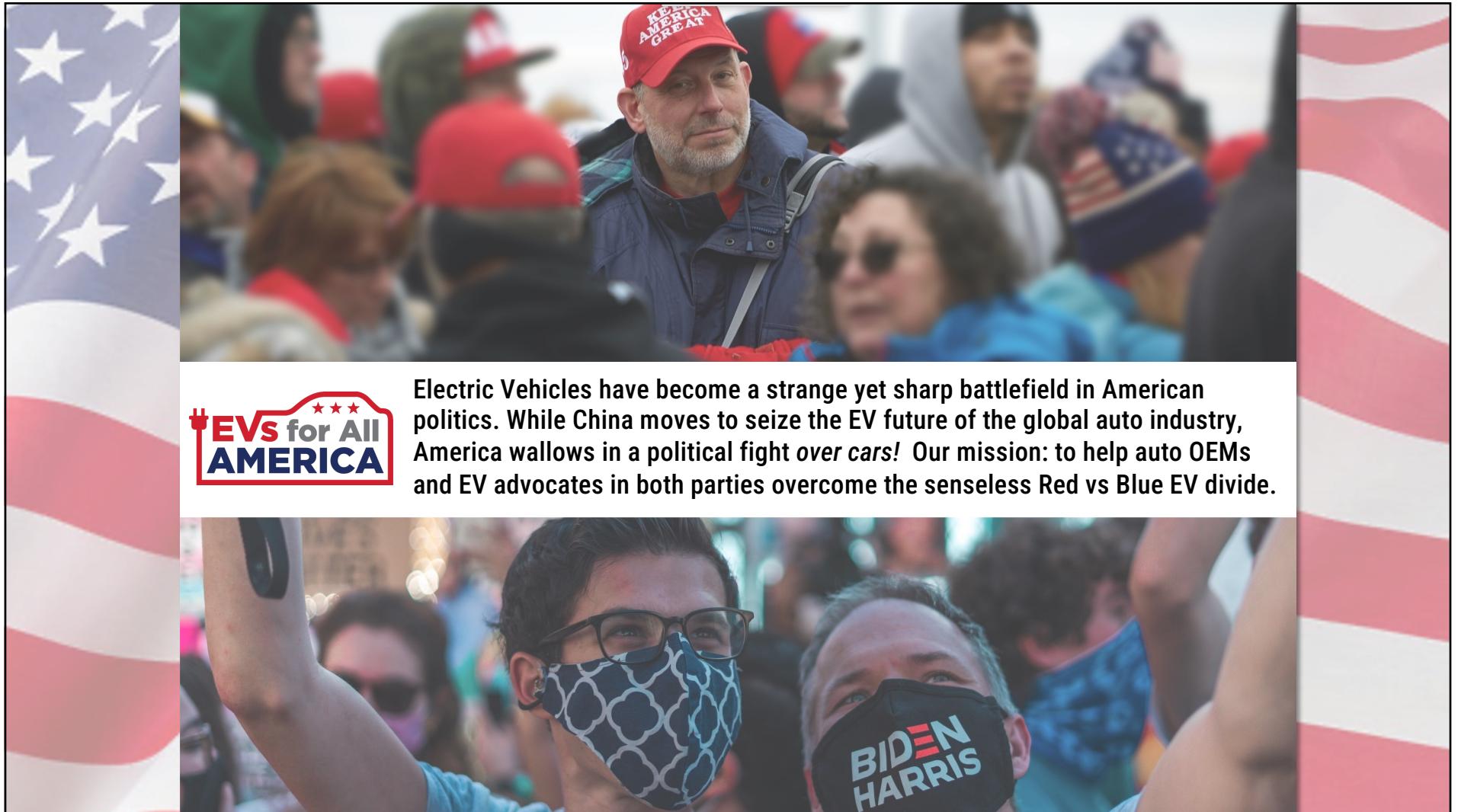
# Fixing America's Partisan Divide Over EVs:

## *Tracking Three Years of Slow Progress*

January 12, 2026



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Electric Vehicles have become a strange yet sharp battlefield in American politics. While China moves to seize the EV future of the global auto industry, America wallows in a political fight over cars! Our mission: to help auto OEMs and EV advocates in both parties overcome the senseless Red vs Blue EV divide.

This report comes from our annual poll of American voter/consumer opinions on Electric Vehicles. It is based on a national poll we have conducted every November since 2023. Our goal is to help automotive OEMs, dealers and EV advocates overcome the silly partisan political divide over EVs.

We work through two non-partisan non-profit groups: the [American EV Jobs Alliance](#) (a c4 advocacy group) and [EVs for All America](#) (a c3 policy and research organization). Both groups were founded by Mike Murphy, a Detroit native and nationally known political consultant who specializes in strategic messaging. Mike became frustrated as the Republican party he has long been associated with embraced a knee-jerk hostility to EVs, ignoring the fact that successfully competing in the global EV marketplace is vital to the [long-term survival of American auto manufacturing](#). With [EVs now making up 25% of global auto sales](#), the partisan war over EVs only hurts American Auto manufacturing while assisting China's relentless effort to dominate global auto manufacturing and de-industrialize its geopolitical rivals.

Click either logo to see each organization's website and learn more. For follow up or media inquiries please contact our Executive director Dan Krassner at [dan@EVsforAmerica.org](mailto:dan@EVsforAmerica.org) or at (850) 321-0432.



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# Our Mission?

## Develop Practical Policies and Messaging to Sell More EVs to Red State America

- **Data-Driven Messaging to Move Hearts and Minds**
  - **Help OEMs Improve EV Messaging:** Reach the EV-resistant 40% of the New + Used Vehicle Market That Identifies Republican
- **New Policies to Fix Key “Pinch Points” to EV Sales:**
  - **Multifamily Residents:** A Huge Potential EV Market
  - **The Dealer Problem:** Need New and Better Dealer Incentives
  - **Develop State-based Incentives in the Top 15 States for EV Sales (80% of Total U.S. EV Sales)**



Our Survey Methodology:

## ***Polling the “Car Commerce” Electorate***

To properly measure both political identify and capture a vast majority of consumers in the U.S. new and used car and light truck market, our annual EV attitudes poll samples registered voters 18+ in households with a total family income of \$50K a year or higher. This sample leaves out approximately 32% of the typical voting electorate in a U.S. Presidential election but does capture 80%+ of the total U.S. new and used car and light truck market. We believe this is the optimal mix for our political opinions within the U.S. auto market focused research. Our survey research consultant team is led by Dr. David B. Hill and Dr. Stephen White of Hill Research Consultants, a highly respected political polling group.

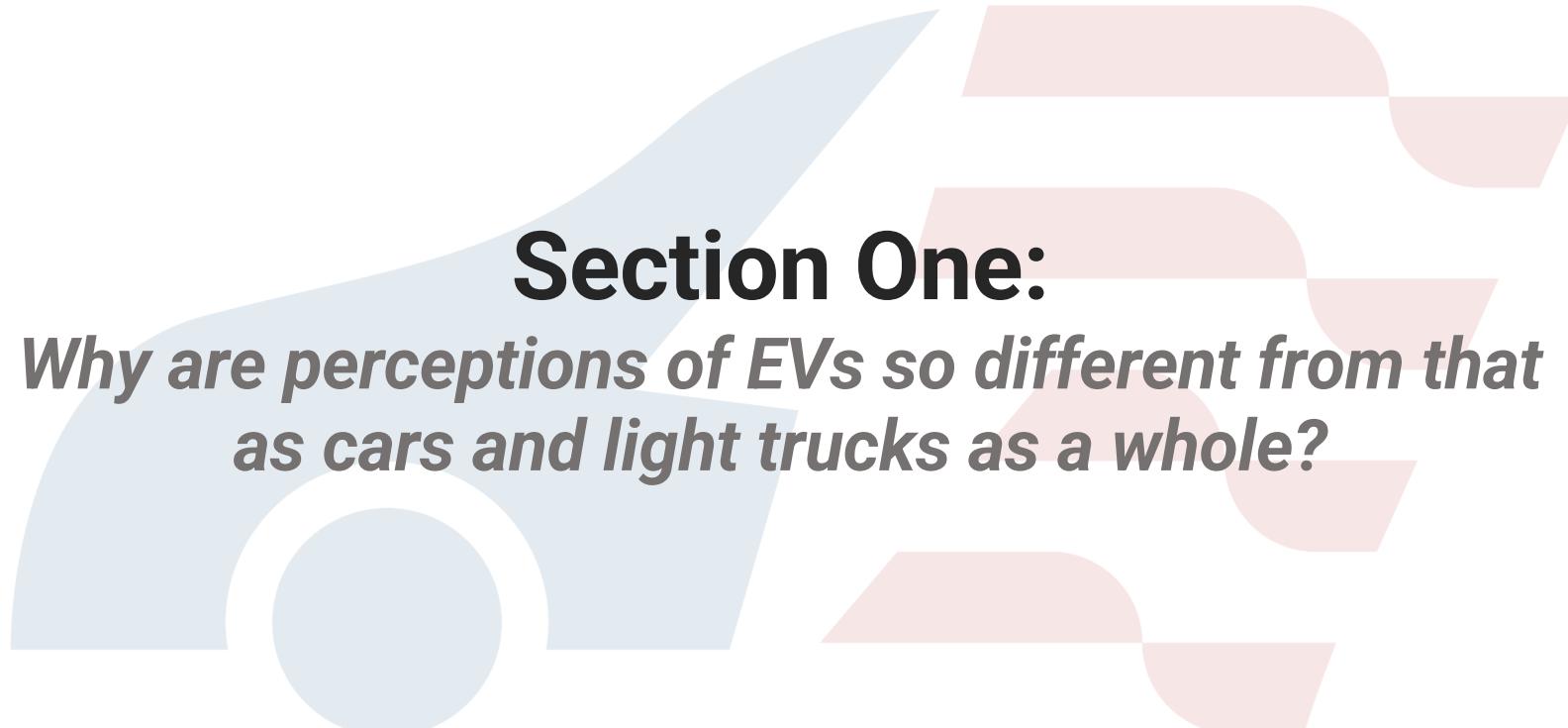
# Highlights:

## *This report covers:*

1. How and Why Opinions on EVs are Much More Partisan than Opinions on Gas Cars and Brands
2. How We Got Here... Polar Bears and Virtue Marketing: Whoops!
3. The Republican “Red Wall” Against EVs is Shrinking Among GOP Consumers
4. The Donald Trump and Elon Musk Relationship Factor: Political Polarization Has Hurt Tesla’s Brand (While Helping the EV Category with Republicans)
5. Only 28% of Respondents Call President Trump a “Good Friend” of U.S. Auto Industry
6. Beyond Politics: Other Drivers of Opinion About EVs
7. How Bad is Loss of Federal EV Subsidies?
8. How to Overcome EV Pinch Points and Sell More EVs?
  - a) Word of Mouth, Charging and the Multifamily Building Level 2 Overnight Charging
9. The EV Debate Shouldn’t Be About Green, it Should Be About Jobs and China

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## Section One:

*Why are perceptions of EVs so different from that  
as cars and light trucks as a whole?*

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# Opinion of American Car Brands: No Partisan Division



■ **Favorable** ■ **Mixed** ■ **Unfavorable**

47% 45%

8%

*Republicans*

45% 43%

13%

*Democrats*

46% 48%

6%

*Independents*

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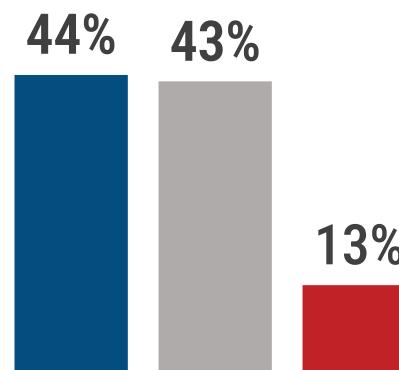
National Survey of 600 Voters with HH Income of \$50K+ representing 67% of U.S. 2020 Electorate/90% of New + Used Vehicle Market.. Nov 2025



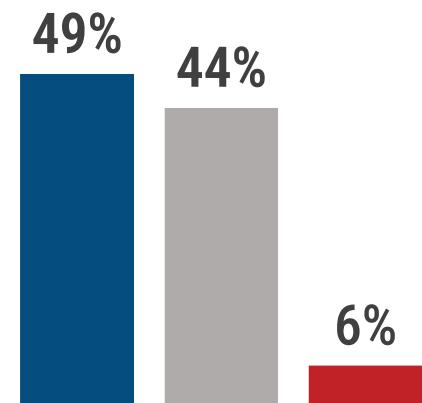
# Opinion of German Car Brands: No Partisan Division



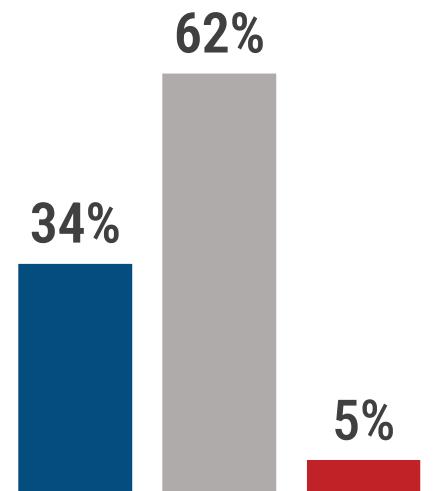
■ ***Favorable*** ■ ***Mixed*** ■ ***Unfavorable***



*Republicans*



*Democrats*



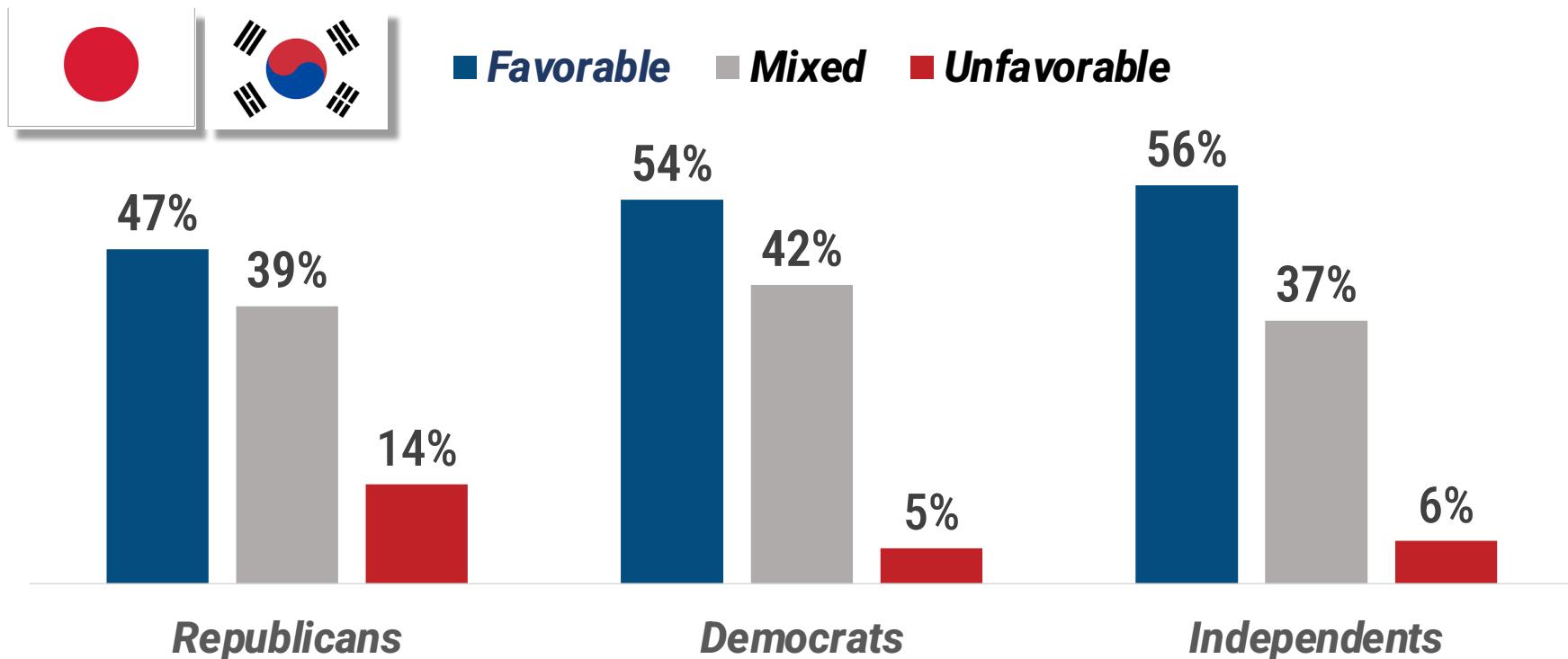
*Independents*

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National Survey of 600 Voters with HH Income of \$50K+ representing 67% of U.S. 2020 Electorate/90% of New + Used Vehicle Market.. Nov 2025



# Opinion of Asian Car Brands: Slight Partisan Division



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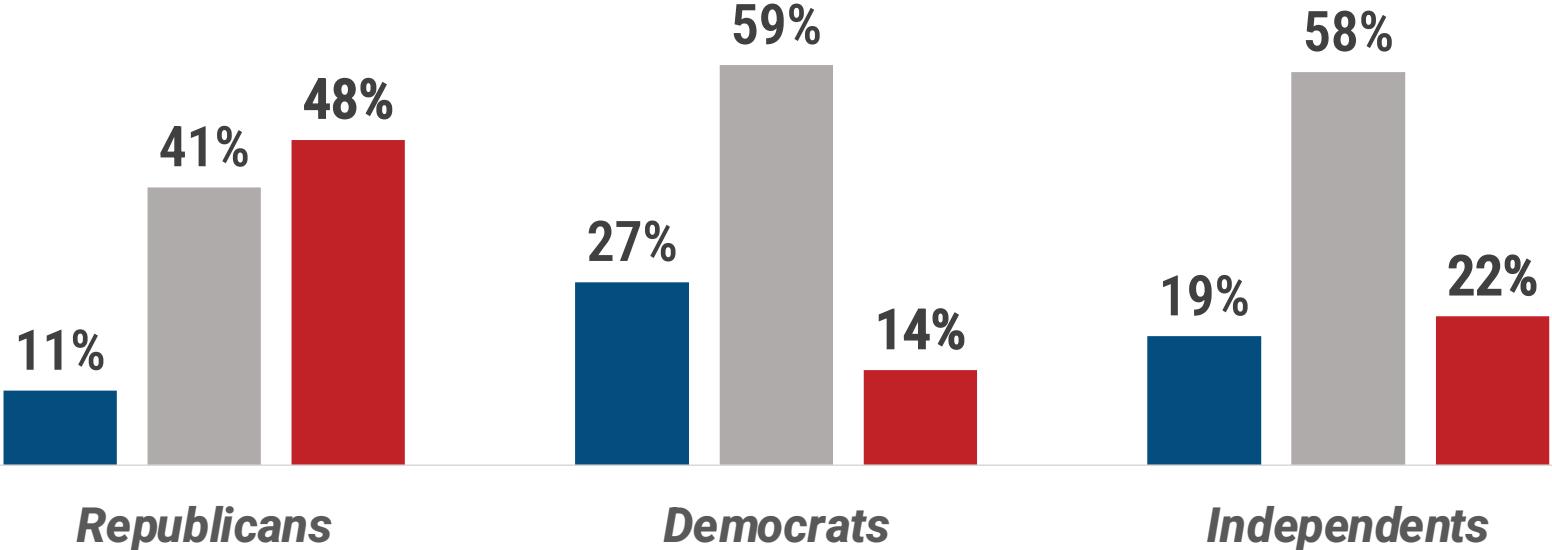
National Survey of 600 Voters with HH Income of \$50K+ representing 67% of U.S. 2020 Electorate/90% of New + Used Vehicle Market.. Nov 2025



## Opinion of Electric Car Brands: a 40-pt Partisan Divide!



■ **Favorable** ■ **Mixed** ■ **Unfavorable**

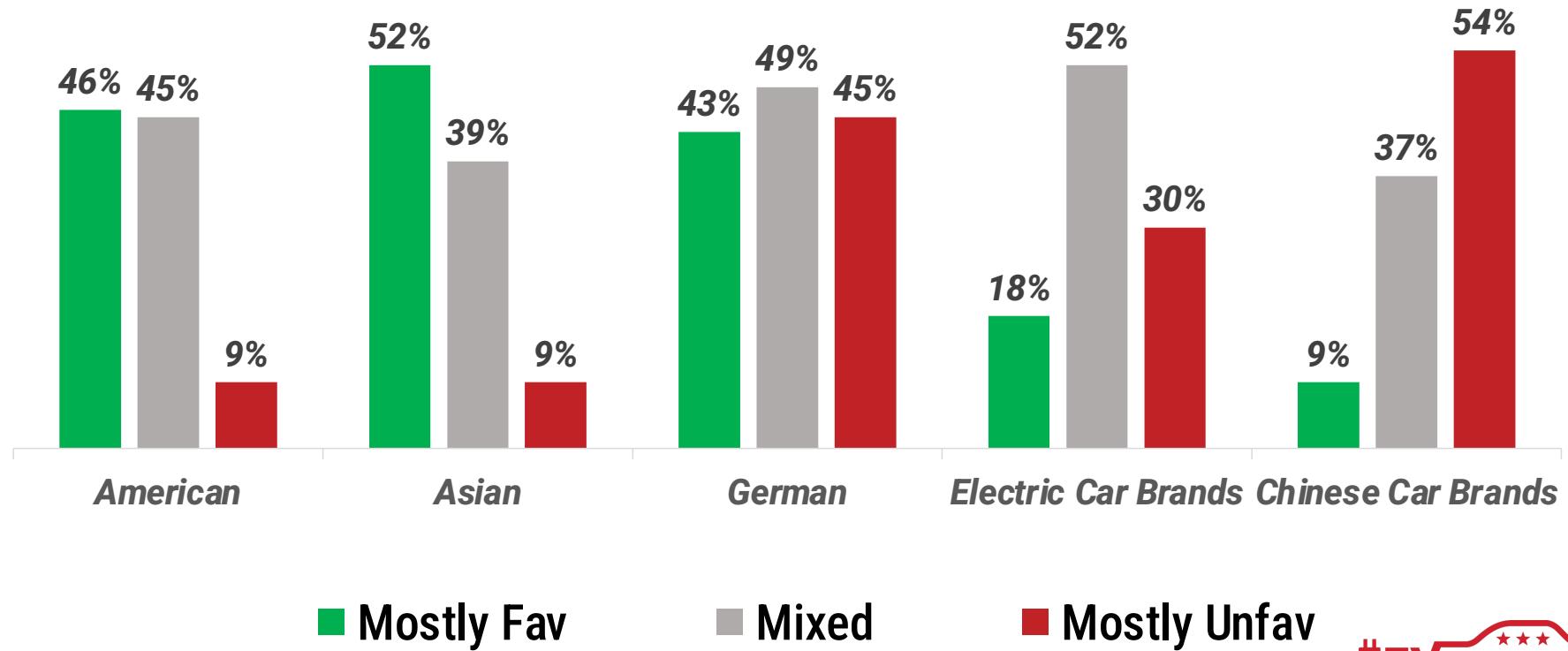


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National Survey of 600 Voters with HH Income of \$50K+ representing 67% of U.S. 2020 Electorate/90% of New + Used Vehicle Market.. Nov 2025



# Opinion of Car Brands by National Origin + EV Category



National Survey of 600 Voters with HH Income of \$50K+ representing 67% of U.S. 2020 Electorate

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# Opinion of Major Car Brands



CHEVROLET



TOYOTA



Mercedes-Benz



Cadillac



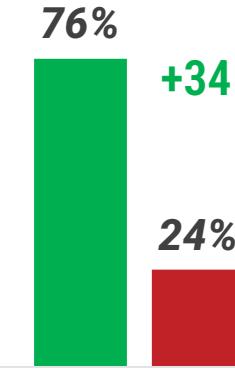
TESLA



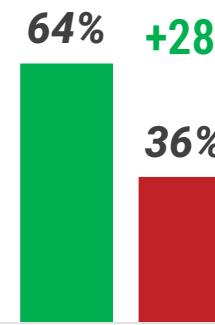
Chevrolet



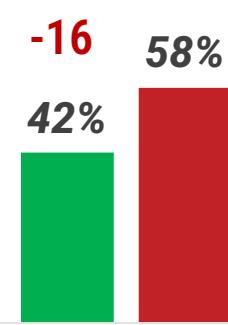
Toyota



Mercedes



Cadillac



Tesla

■ Favorable

■ Unfavorable

National Survey of 600 Voters with HH Income of \$50K+ representing 67% of U.S. 2020 Electorate

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## What Sparked This Fierce Partisan Political Battle Over EVs?

*While Biden's strong support for EVs and Trump's hostility toward EVs supercharged polarization during the 2024 election, but the root of polarization over EVs goes back to a huge strategic marketing blunder in 2010...*

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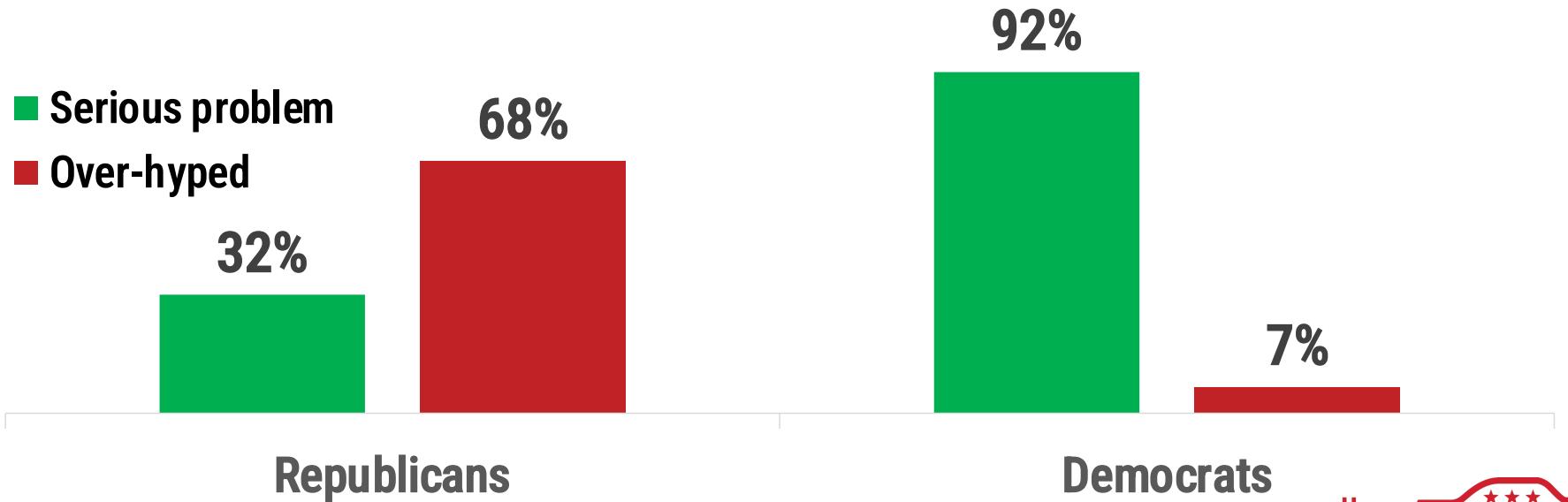
Nissan Leaf and the Grateful Polar Bear ads!

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# The Problem with Climate Virtue Branded Vehicles?

*America is Deeply **Polarized** Over Climate Change:*

**Which is Closest to Your View: “Climate Change is a **Serious Problem** and **Action is Needed Now** or Climate Change is **Over-Hyped by Media** and We Should Worry Less About It?”**

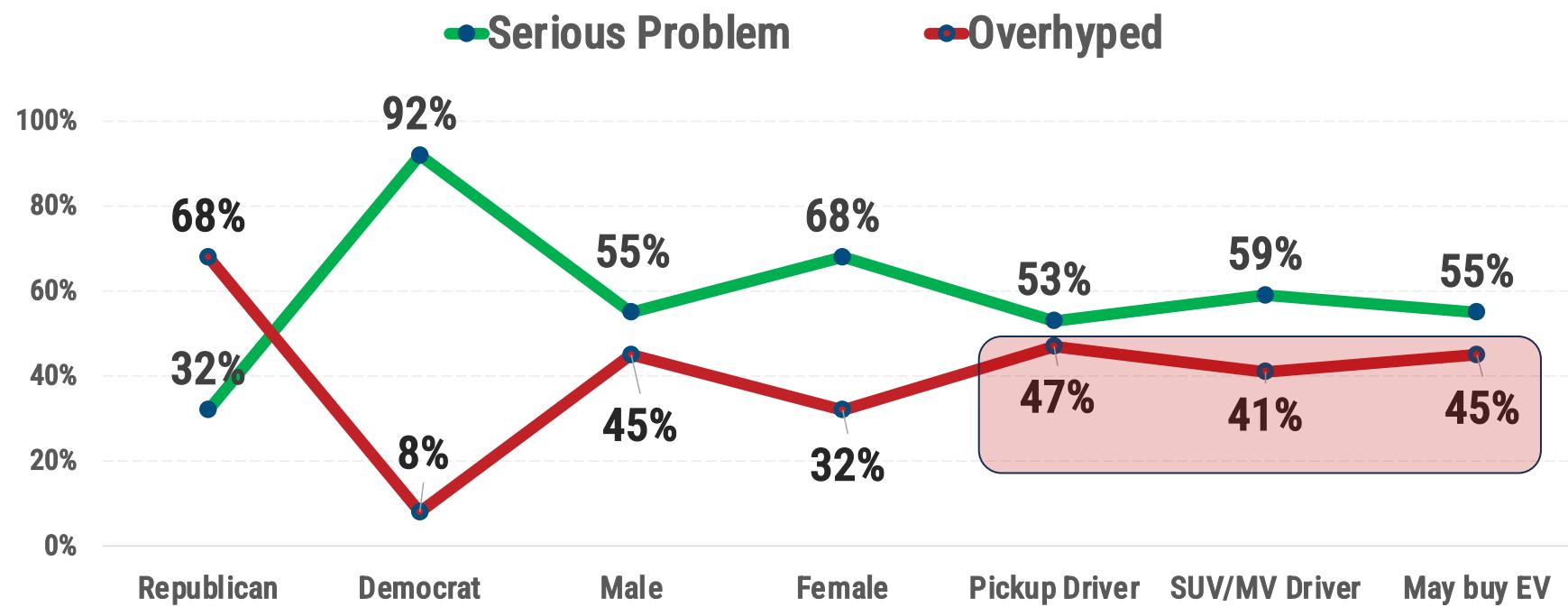


Nov 2025 National Survey of 600 Voters with HH Income of \$50K+ representing 67% of U.S. 2020 Electorate

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# Closest to Your View: Climate Change Is Serious Problem or... Climate Change Is Overhyped?





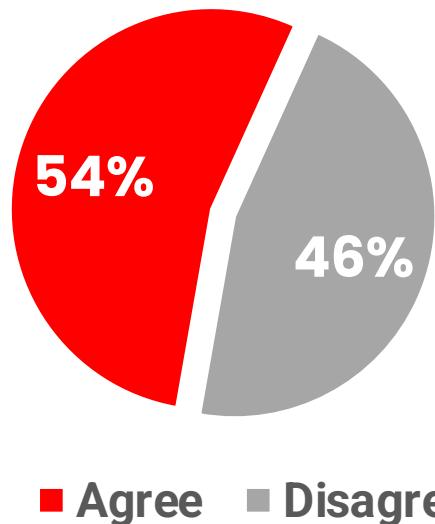
**Now, EVs are Stuck in Our Divided Politics:**  
*EVs are perceived by GOP Consumers not as vehicles, but as statements, particularly on climate policy.*

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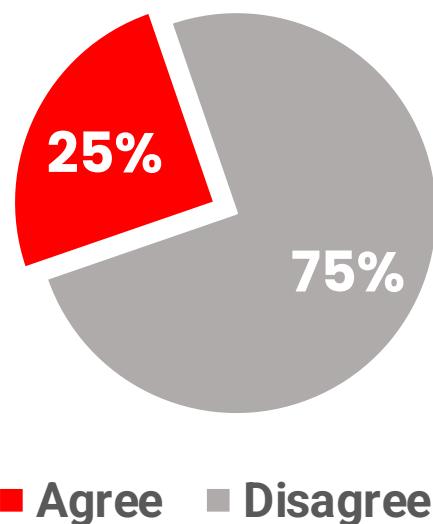


## 2024 Post Election: Do You Agree/Disagree: “EVs are for People Who *See the World Differently* than I Do.”

2024 GOP Prez Voters:



2024 Dem Prez Voters:



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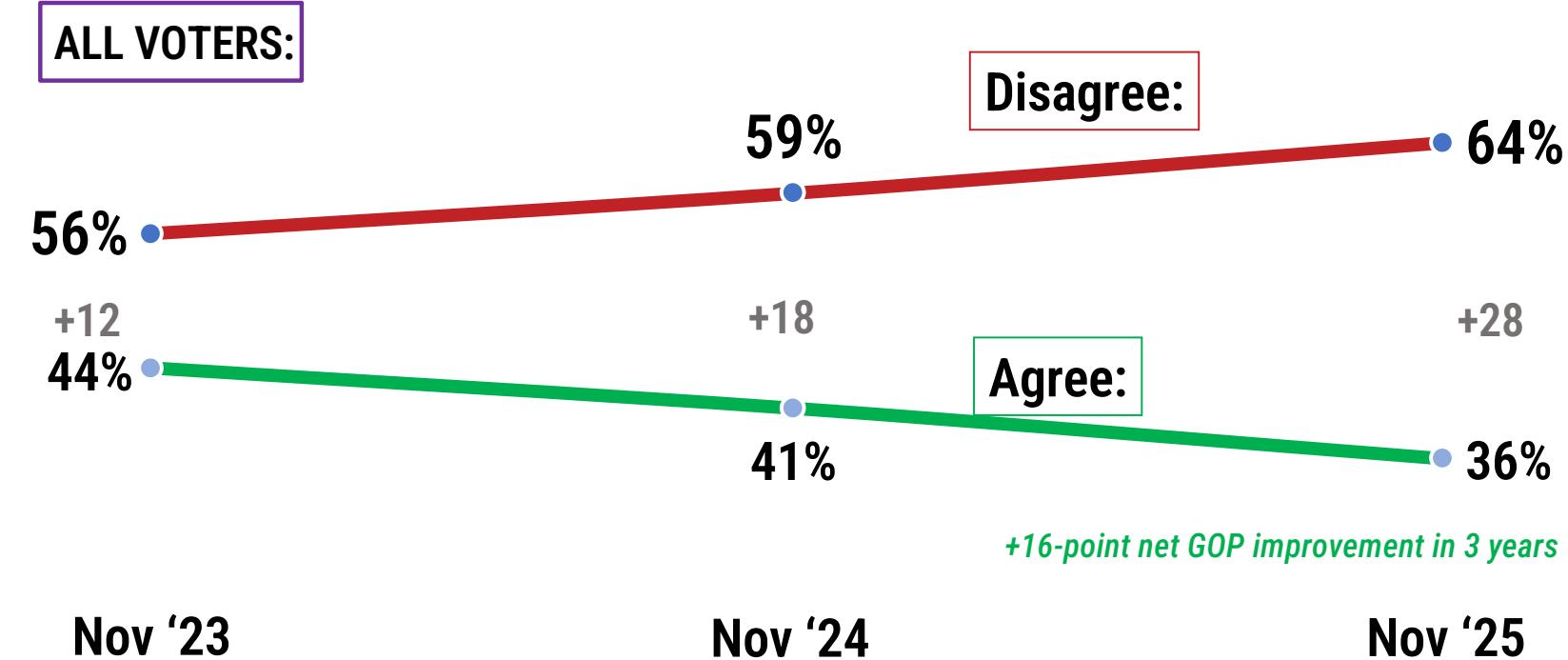


**Good News: the EV “Red Wall” is Shrinking:**  
*Republican cultural suspicion of EVs has declined by  
20 points since 2023*

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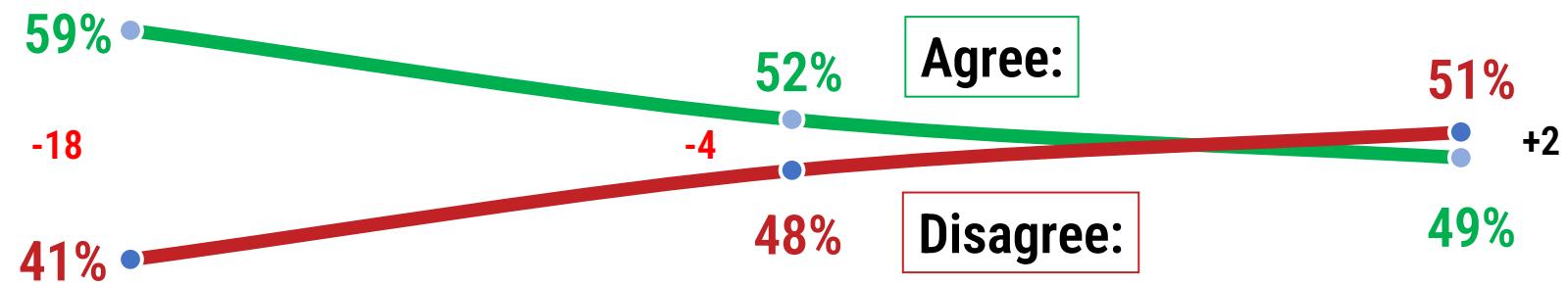
# The Red vs Blue EV Culture Gap is Slowly Declining: "EVs are for People Who See the World Differently Than I Do"



# Republicans Have Improved by 20 Points: "EVs are for People Who See the World Differently Than I Do"



REPUBLICANS:



+20-point net improvement in 3 years

Nov '23

Nov '24

Nov '25

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# Democrats Have Inched Up Slightly: “EVs are for People Who See the World Differently Than I Do”



DEMOCRATS:

75%

76%

80%

+50

+52

+60

25%

24%

20%

Nov '23

Nov '24

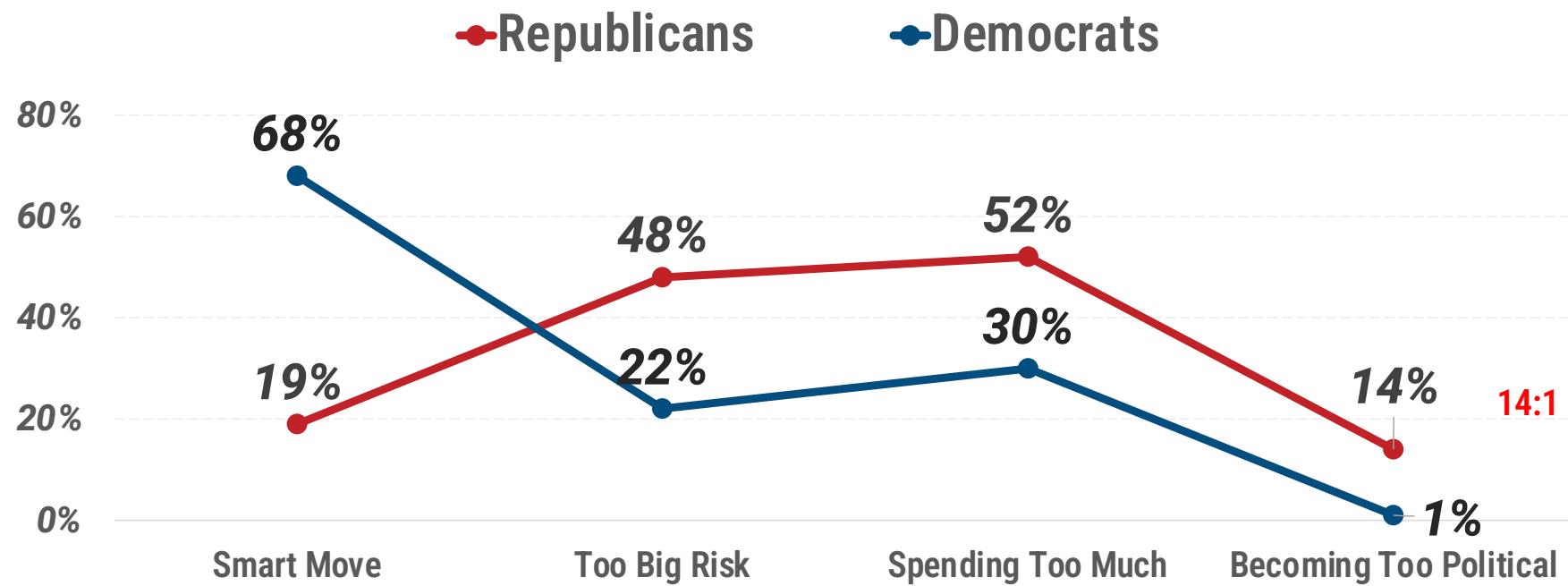
Nov '25

Disagree:

Agree:

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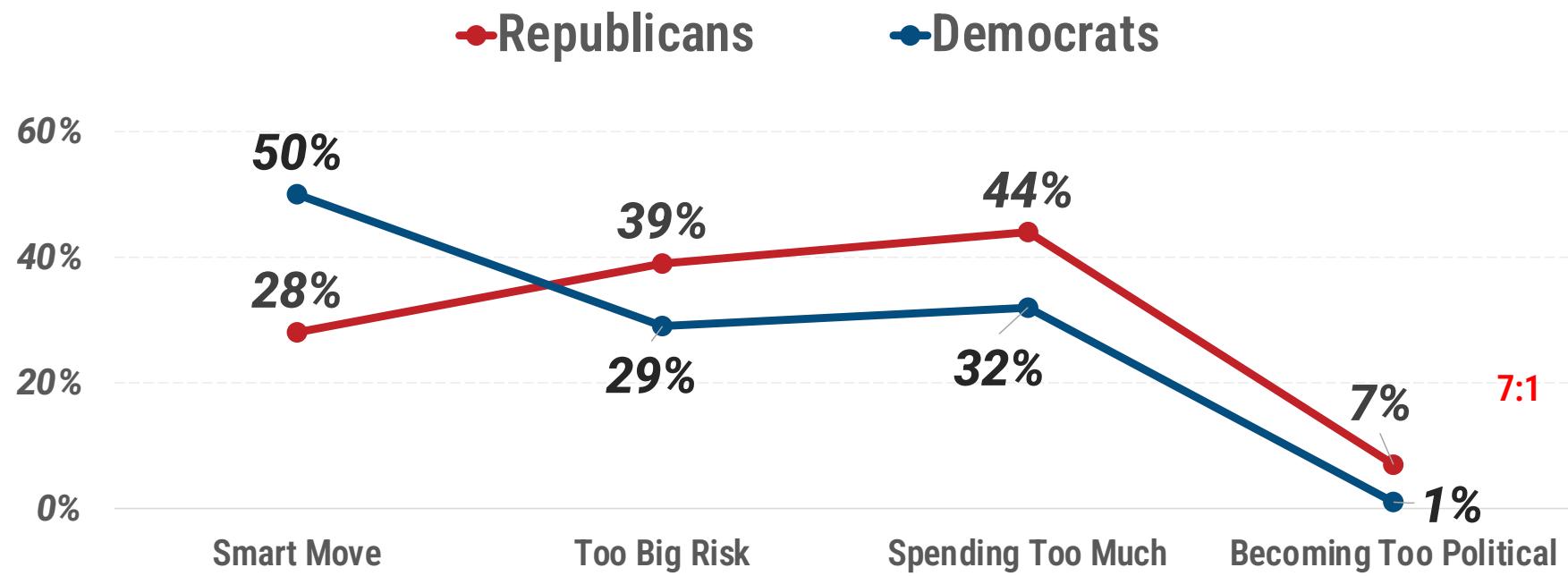
# Nov 2024: "If You Got an EV... What Would Your Best Friends and Relatives Think?"



National Survey of 600 Voters with HH Income of \$50K+ representing 67% of U.S. 2020 Electorate

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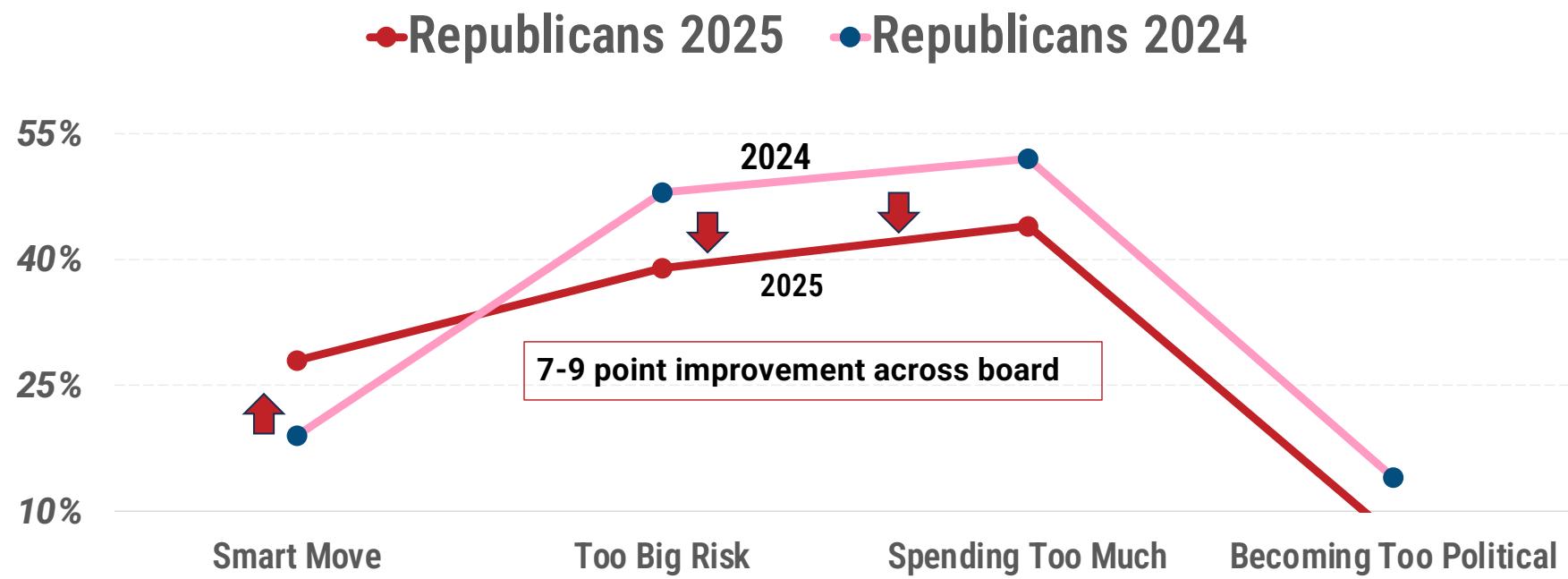
## Nov 2025: "If You Got an EV... What Would Your Best Friends and Relatives Think?"



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# 2024-2025 Progress: “If You Got an EV... What Would Your Best Friends and Relatives Think?”



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# Democrats Always Pro-EV

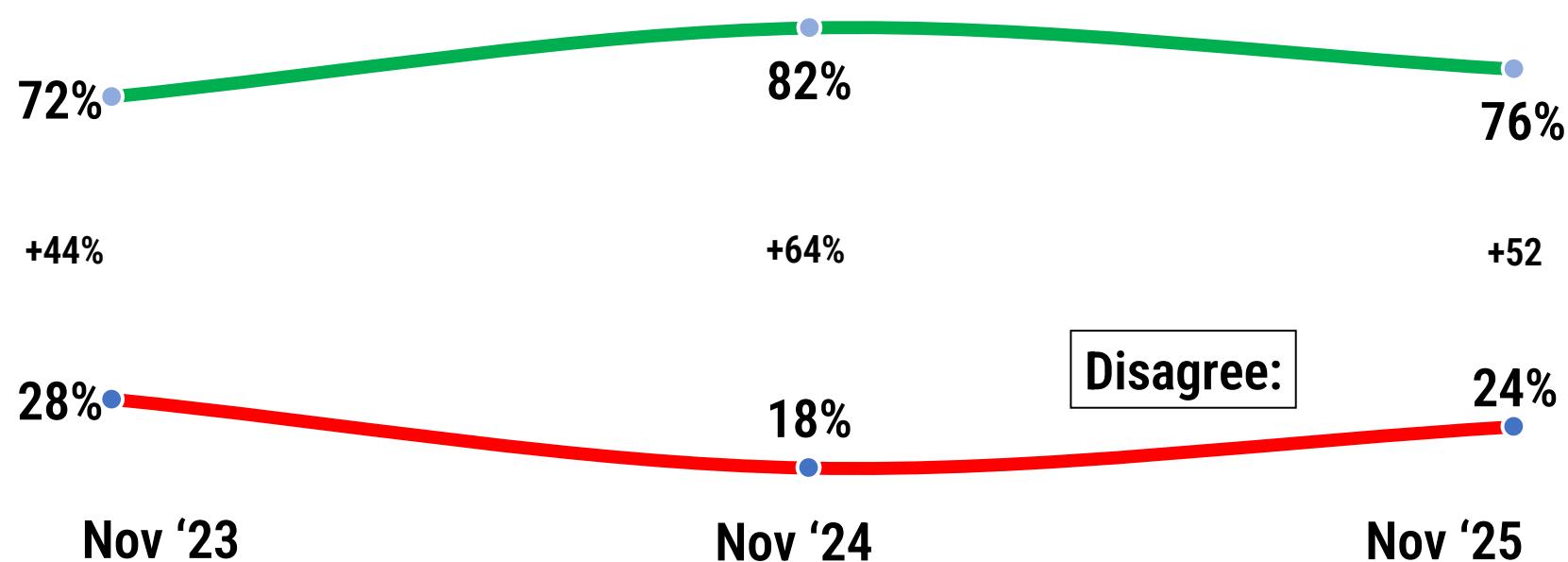
*"EVs are the Future and One Day I'll Probably Drive One"*



DEMOCRATS:

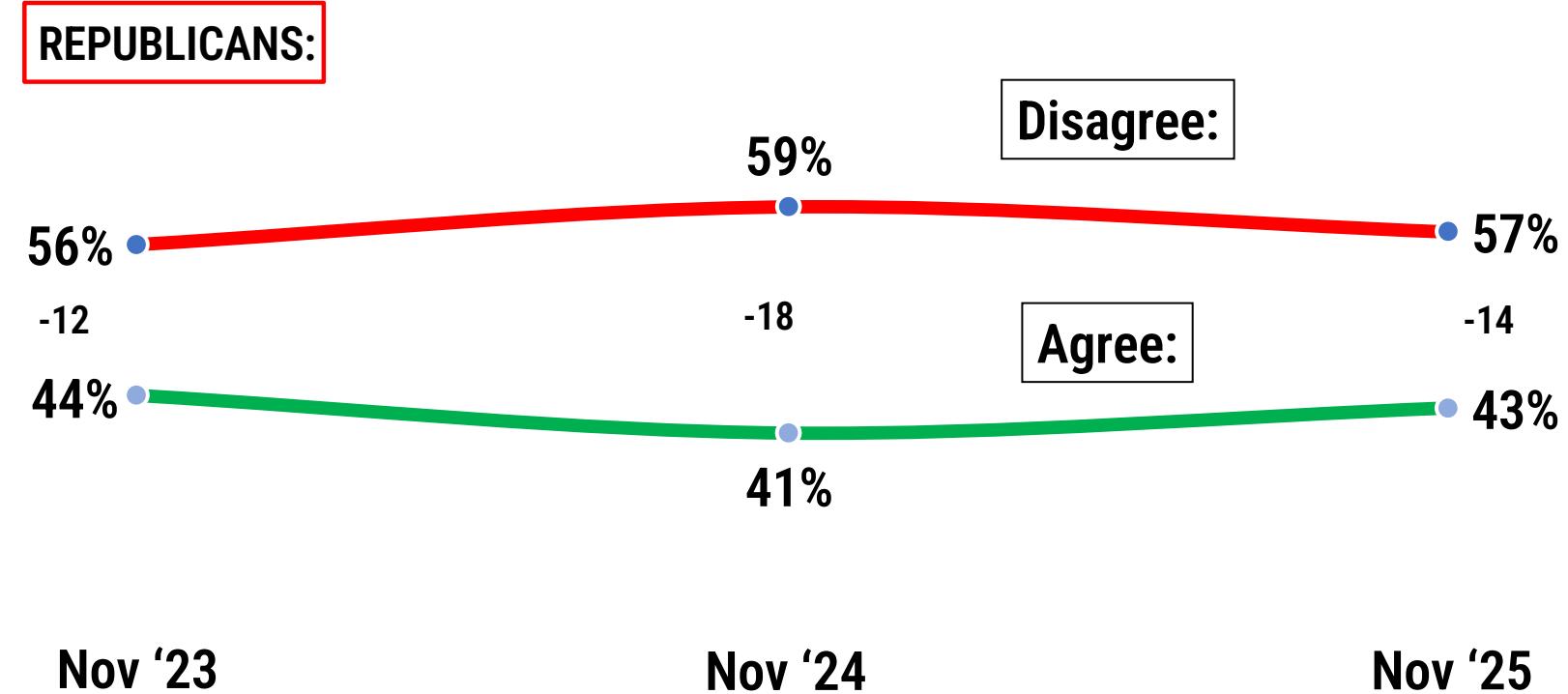
Agree:

Disagree:



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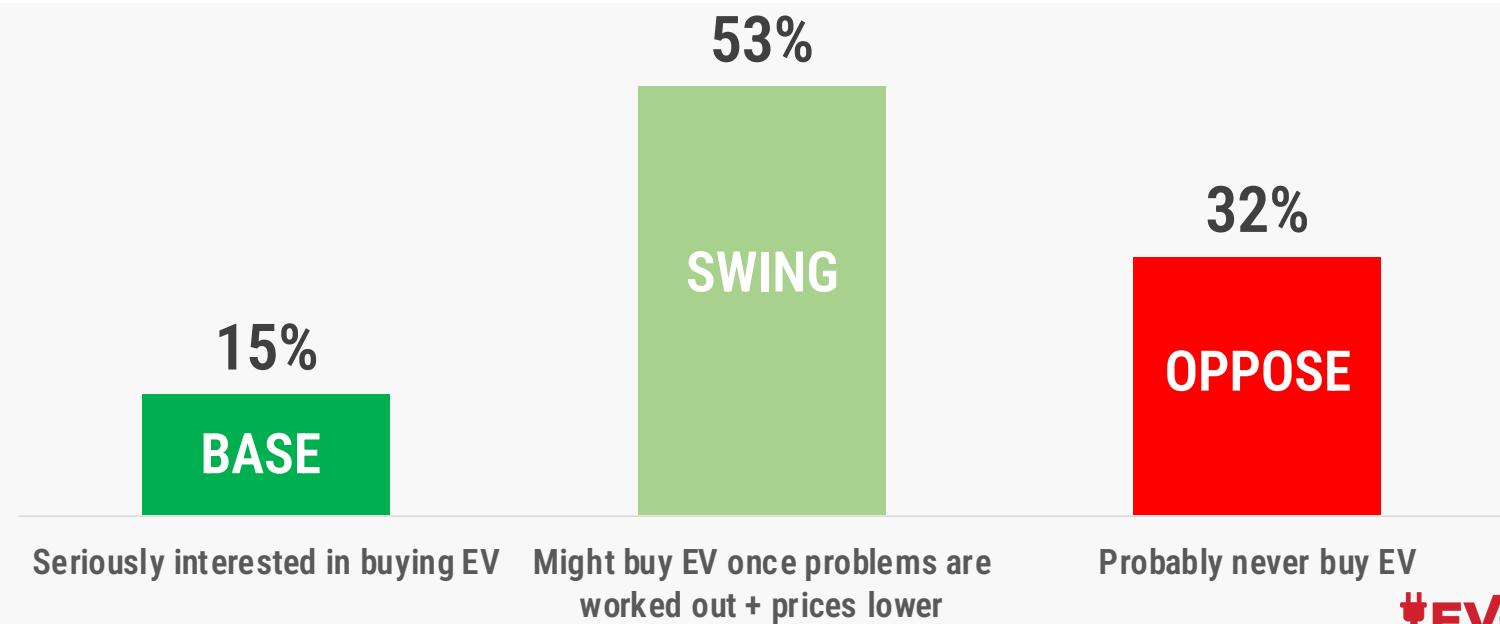
# Republicans Are Not There Yet: Flat “EVs are the Future and One Day I’ll Probably Drive One”



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# EVs and the Auto Market from a Campaign POV: *Base, Swing and Opponent Segments*

## View on Buying or Leasing an EV:



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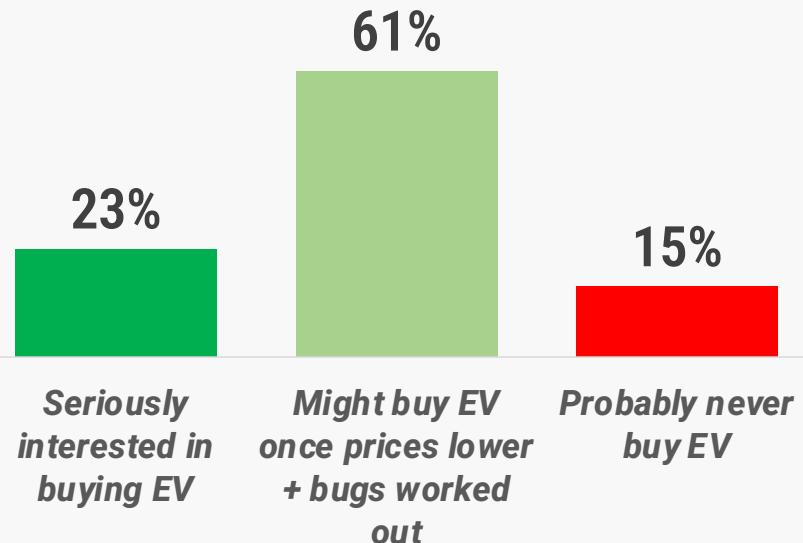


# Dem vs GOP by Level of Interest in Buying EVs: a 30 Point Gap

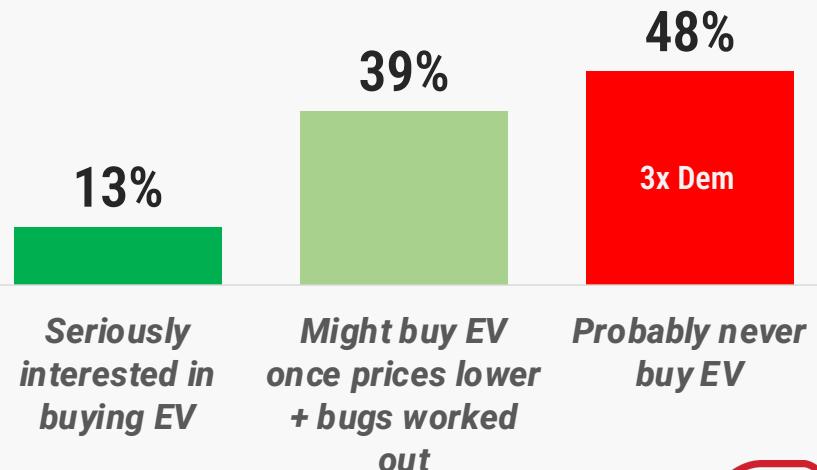
“When It Comes To Electric Vehicles, Which Best Describes You?”



84% **Democrats** are open to EVs



52% **Republicans** are open to EVs

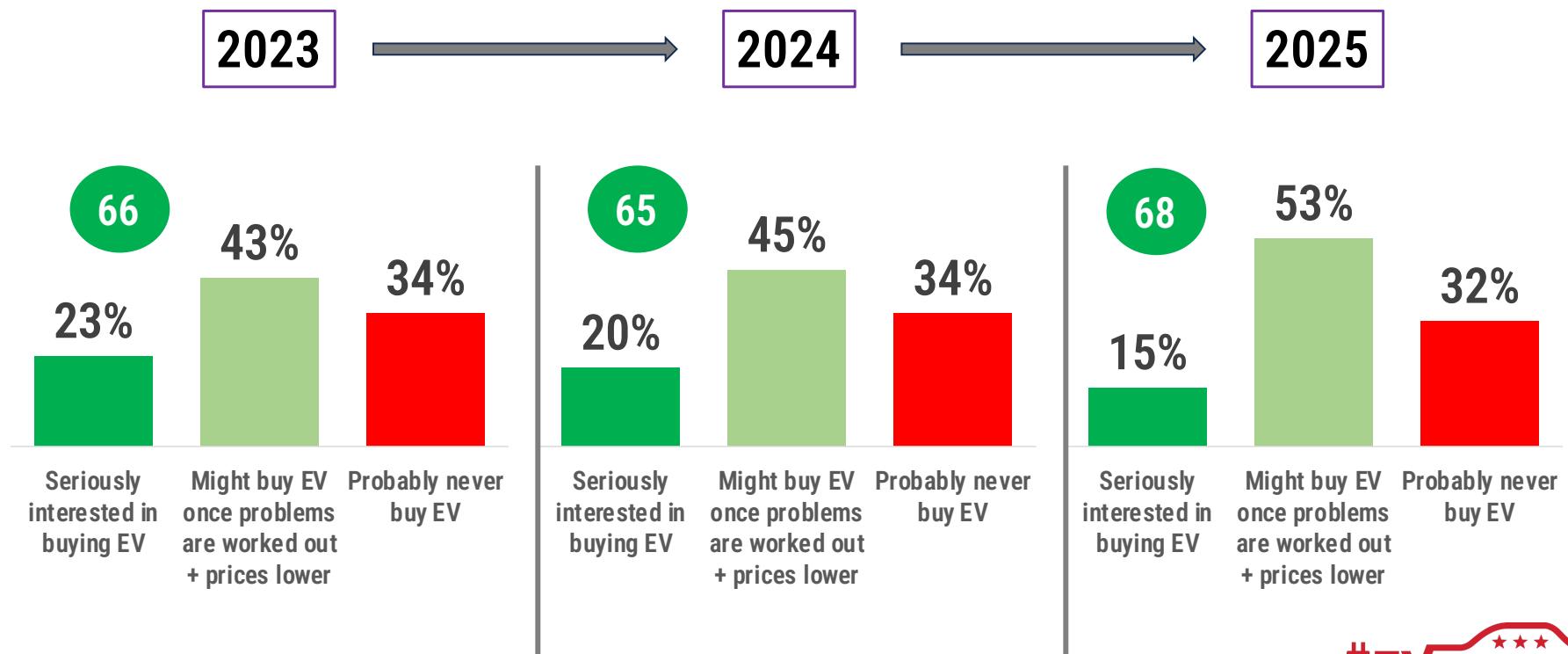


National Survey of 600 Voters with HH Income of \$50K+ representing 67% of U.S. 2020 Electorate Nov 2025 Copyright 2026



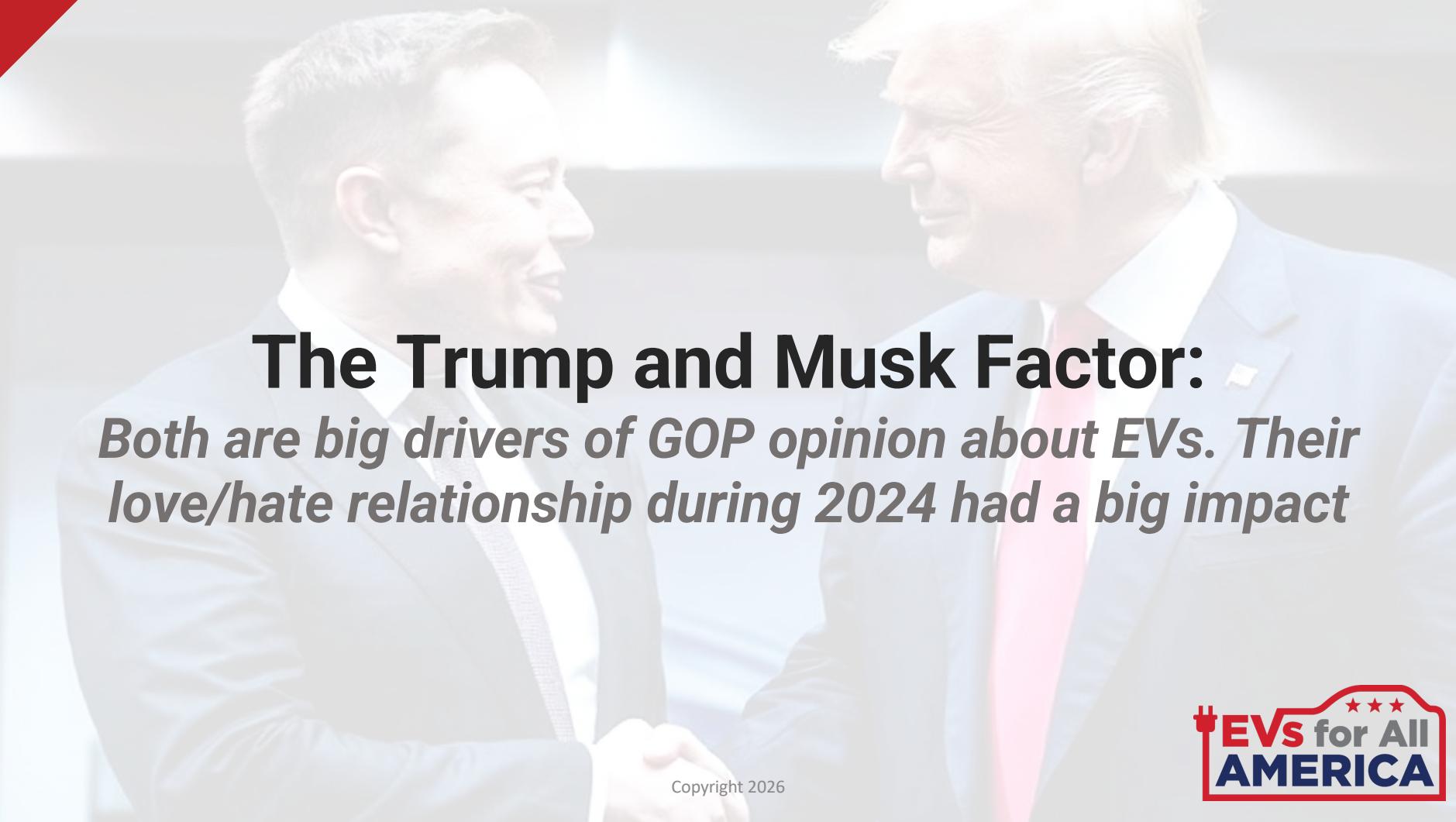
# 2023 → 2025

*Base, Swing and Opponent Segments Over Last Three Years*



National Survey of 600 Voters with HH Income of \$50K+ representing 67% of U.S. 2020 Electorate. Nov 2023, 2024, 2025 Copyright 2026





# **The Trump and Musk Factor:**

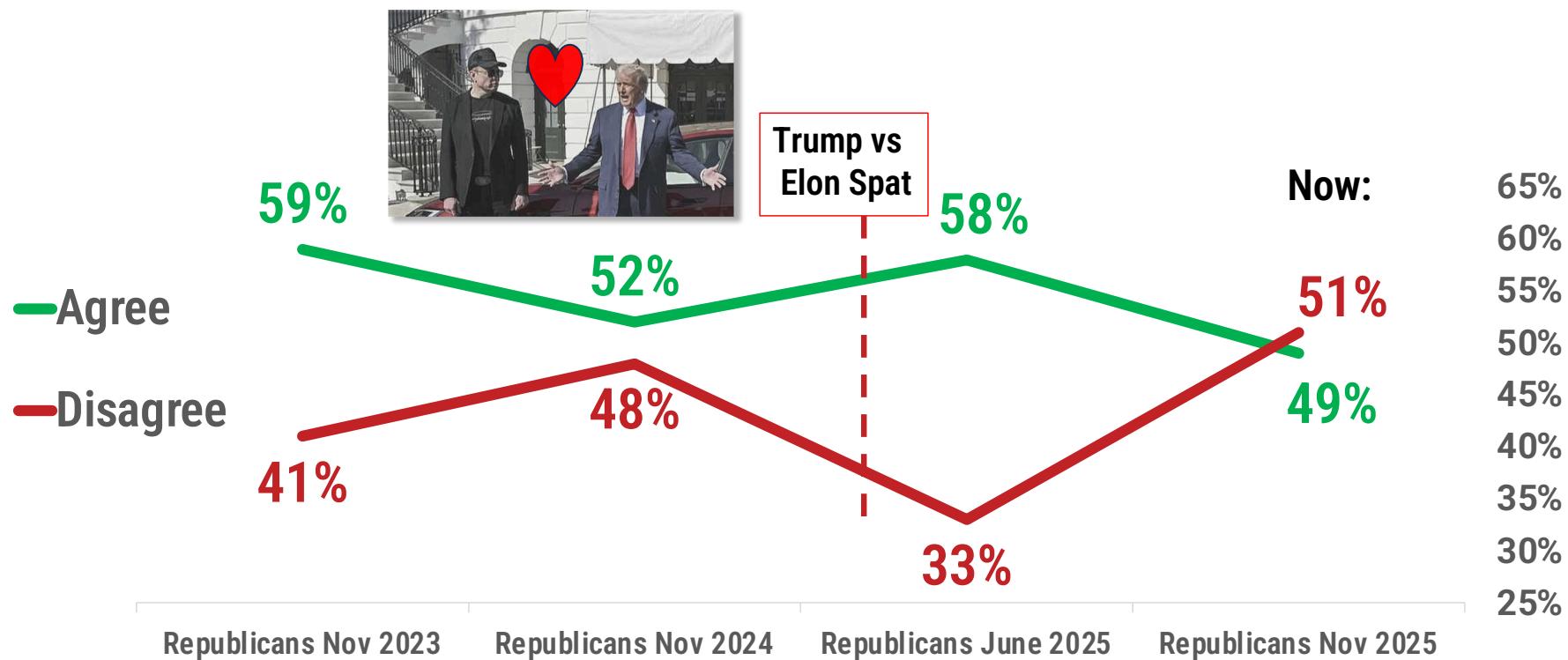
***Both are big drivers of GOP opinion about EVs. Their love/hate relationship during 2024 had a big impact***

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# Trump & Elon: First a GOP Feud but Now Recovery

Agree/Disagree: *"EVs are for People that See the World Differently Than I Do"*

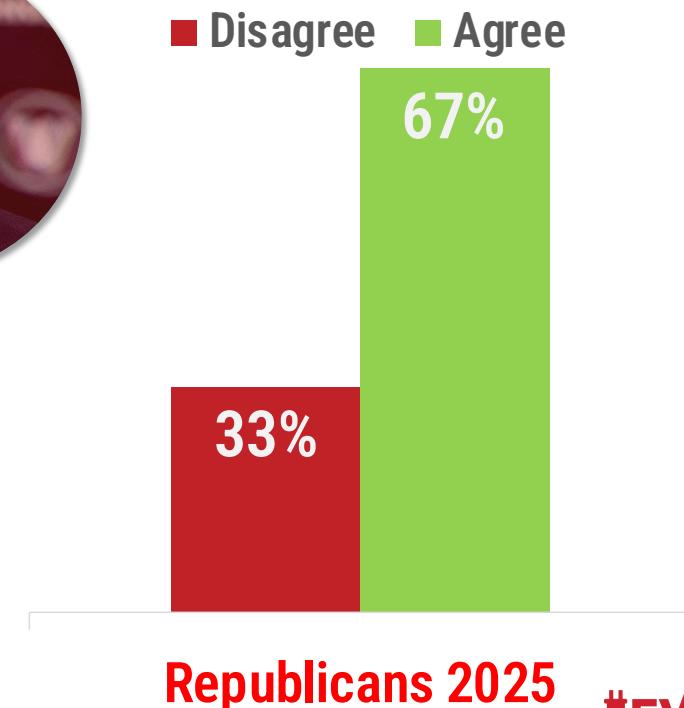
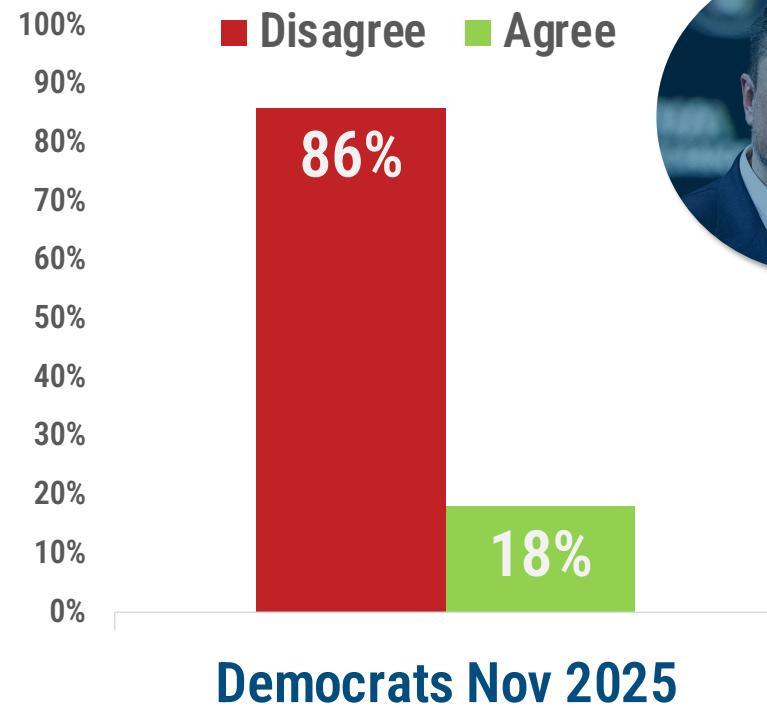


National Survey of 600 Voters with HH Income of \$50K+ representing 67% of U.S. 2020 Electorate + 2025 National Survey June 585 \$50K+ HH Voters Copyright 2026



# Elon's Brand is Super-Partisan: Dems Hate His Connection to EVs

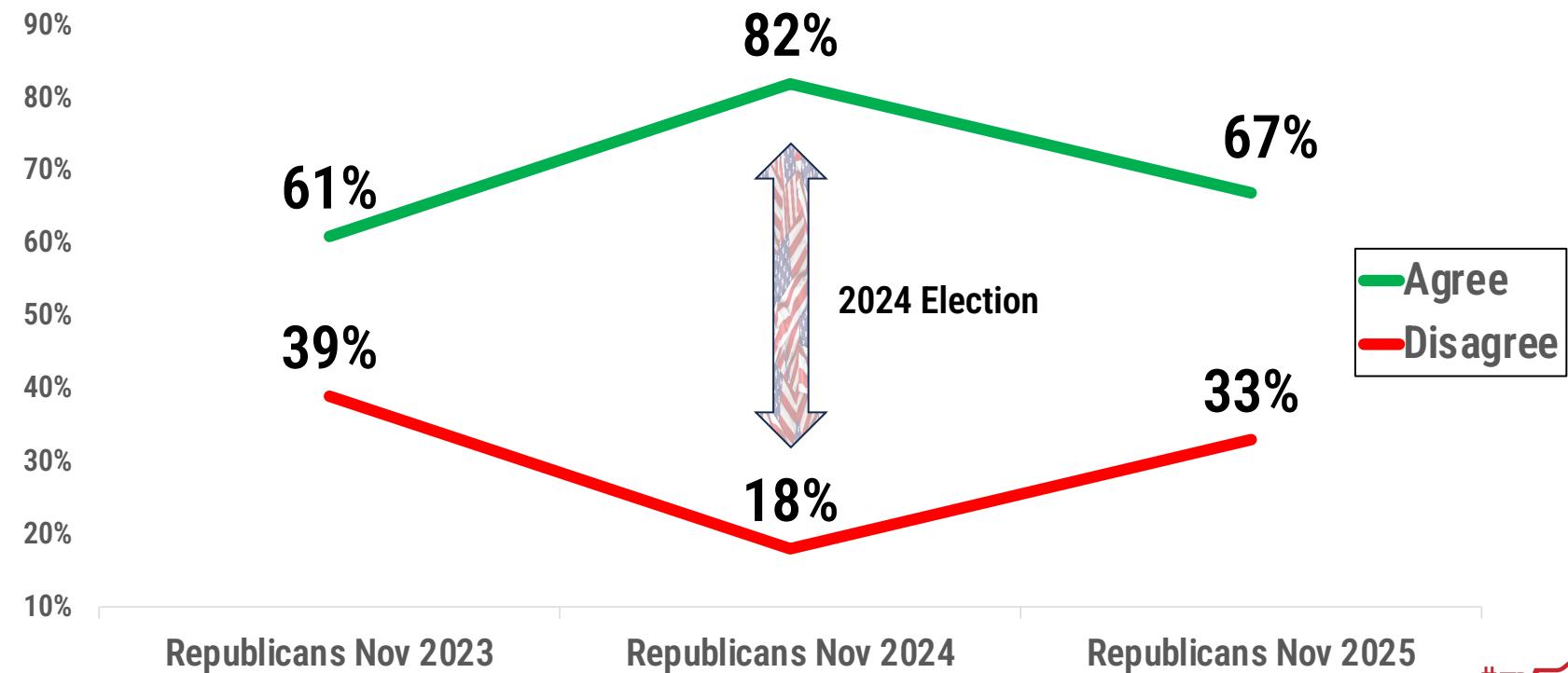
## Agree/Disagree: "Elon Musk is a Good Ambassador for EV Sales"



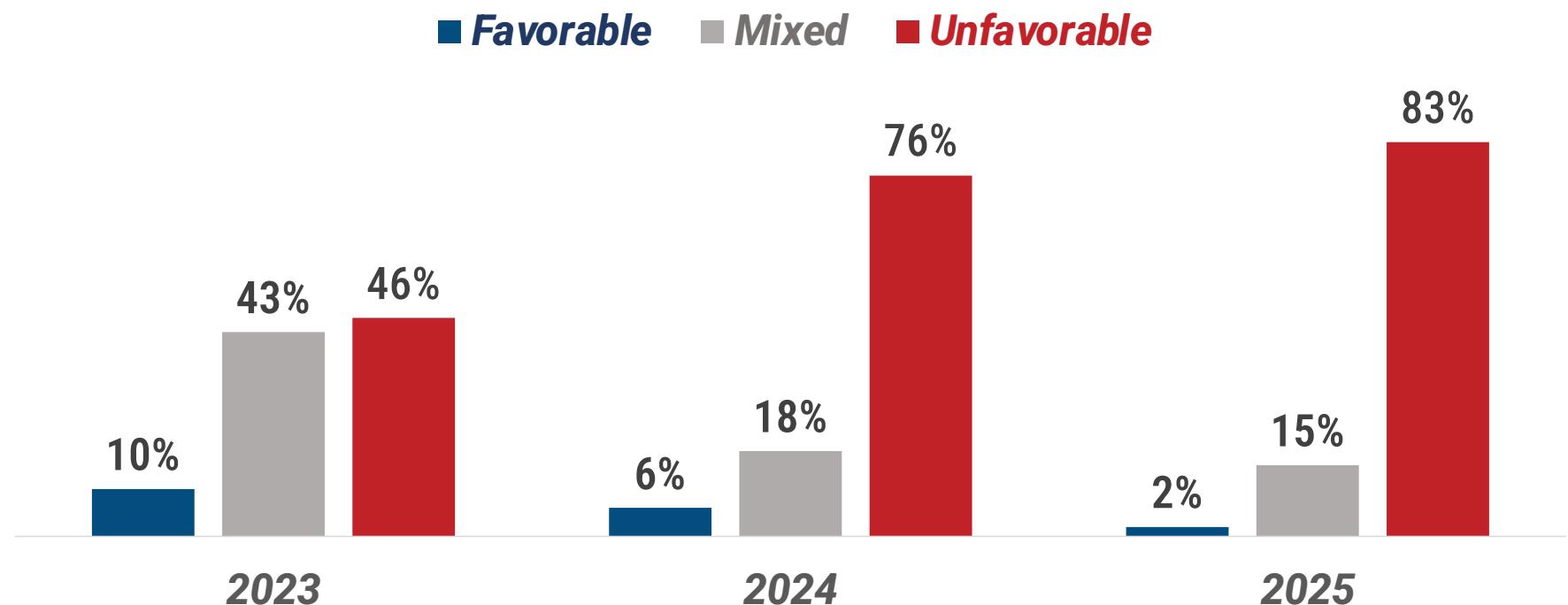
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# Republican Love for Elon Peaked During 2024 Campaign: Agree/Disagree: *“Elon Musk is a Good Ambassador for EV Sales”*



# Democrat Consumers' Opinion of Elon Musk



Nationwide Automobile Surveys November 2023, November 2024, & November 2025

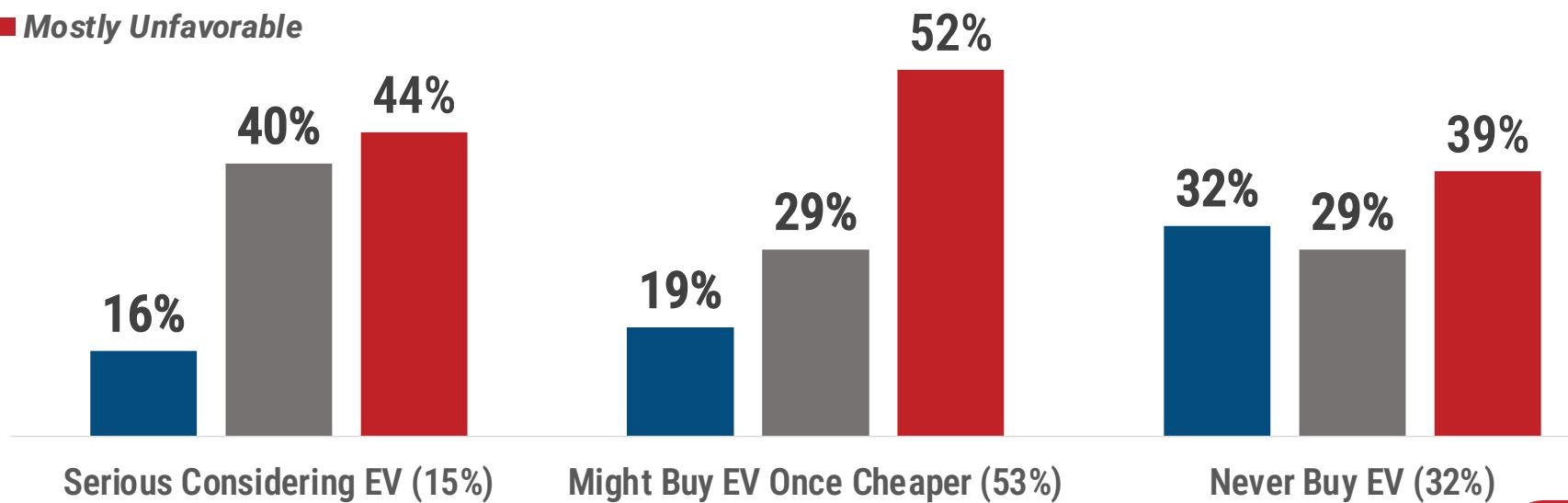
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# Opinion of Elon Musk By EV Buying Interest:



- **Mostly Favorable**
- **Mixed**
- **Mostly Unfavorable**



National Survey of 600 Voters with HH Income of \$50K+ representing 67% of U.S. 2020 Electorate

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## Opinions of Car Brands **Among Those Seriously Interested in Buying an EV in Next Year or So:**



CHEVROLET

76%

24%

*Chevrolet*



TOYOTA

91%

9%

*Toyota*



Mercedes-Benz

88%

12%

*Mercedes*



*Cadillac*

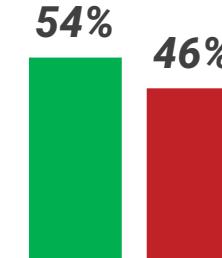
76%

24%

*Cadillac*



TESLA

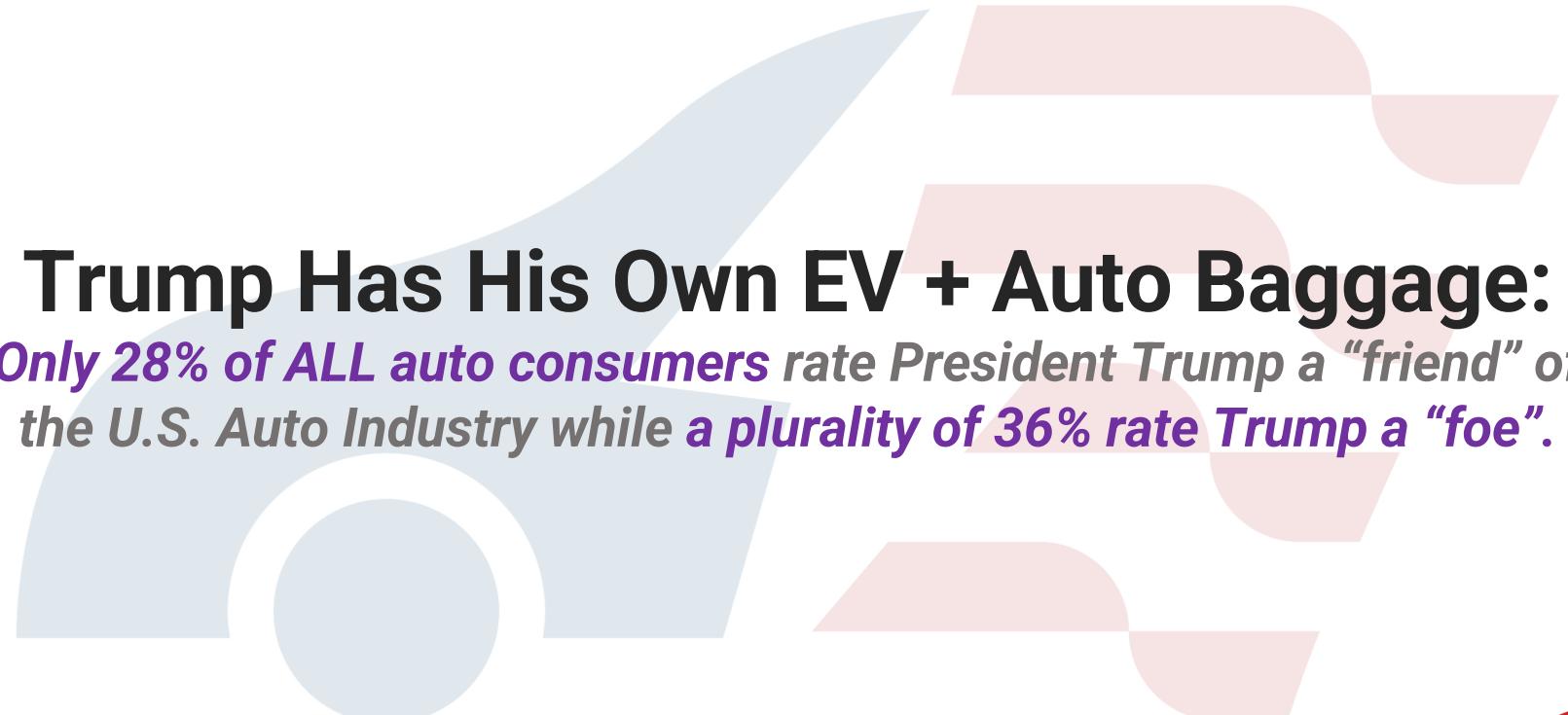


National Survey of 600 Voters with HH Income of \$50K+ representing 67% of U.S. 2020 Electorate Conducted Nov 2025

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**Not a Fun Time to be Tesla's CMO:**  
*Tesla brand fav/unfav is weak, even among  
consumers who are seriously considering  
buying/leasing EV in next year.*



## Trump Has His Own EV + Auto Baggage:

*Only 28% of ALL auto consumers rate President Trump a “friend” of the U.S. Auto Industry while a plurality of 36% rate Trump a “foe”.*

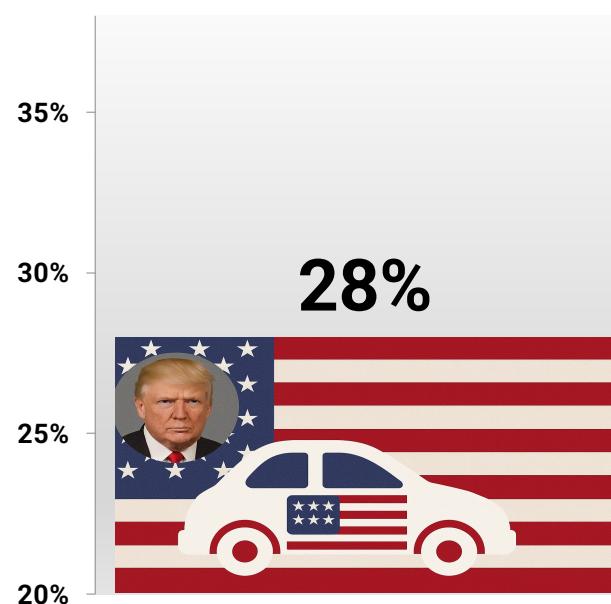
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# Only 28% of Consumers Say Donald Trump is Good Friend of the U.S. Auto Industry While 36% Say Trump is Foe of the Auto Industry:



"Would you say that President Donald Trump is a good friend, sometime friend or foe of the US auto industry?"



 **Good Friend U.S. Auto Industry**

 **Foe of U.S. Auto Industry**

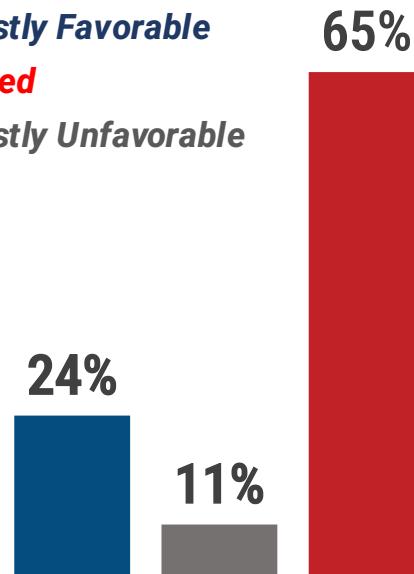
 **Sometime Friend**

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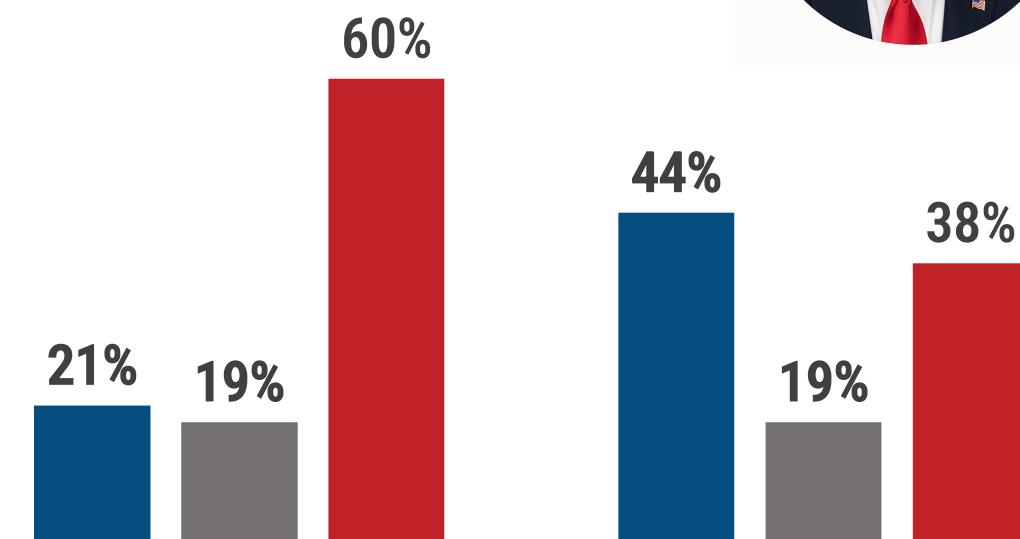
# Opinion of Donald Trump By EV Buying Interest:



- **Mostly Favorable**
- **Mixed**
- **Mostly Unfavorable**



*Serious Considering EV (15%)* *Might Buy EV Once Cheaper (53%)*



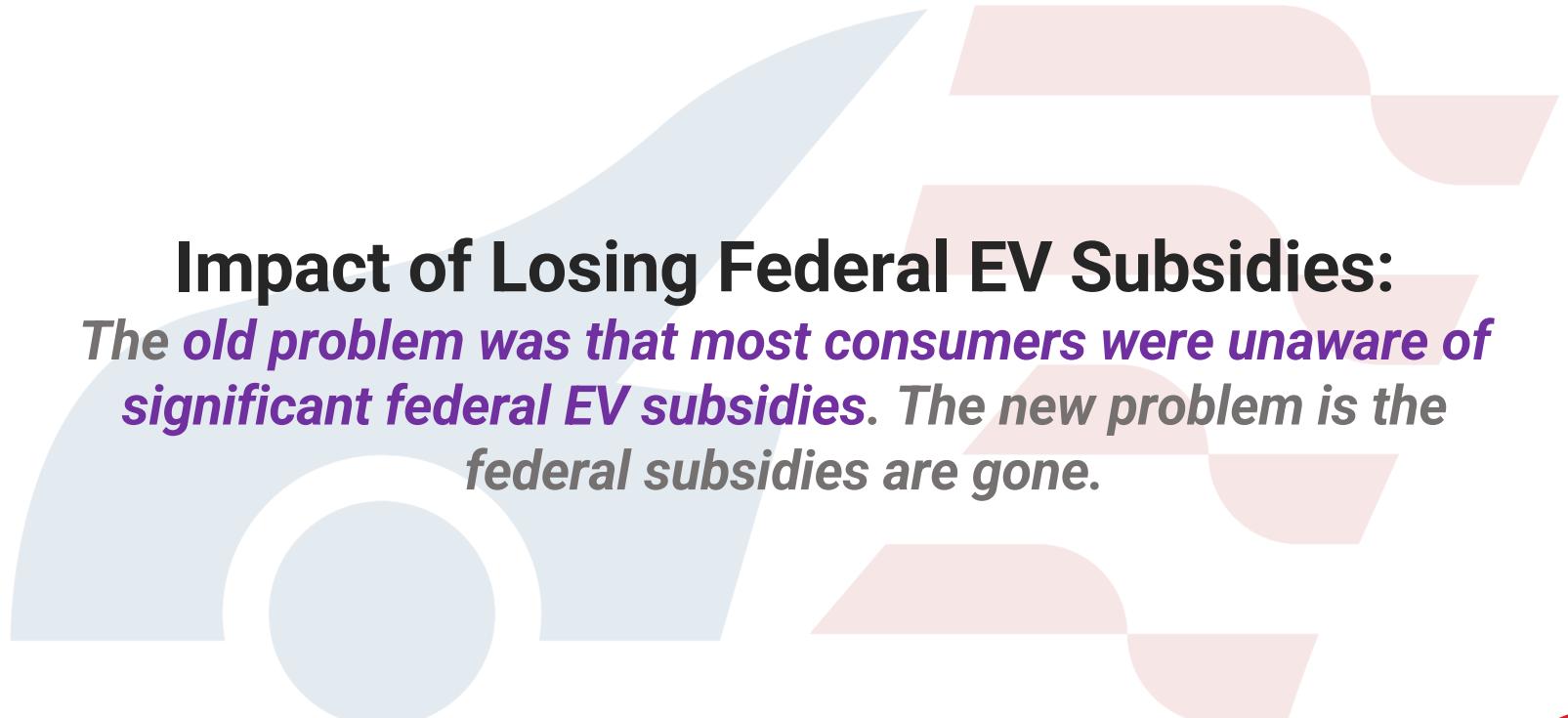
*Never Buy EV (32%)*



**Beyond Political Identity:**  
The other big driver of opinion about EVs... **is age.**

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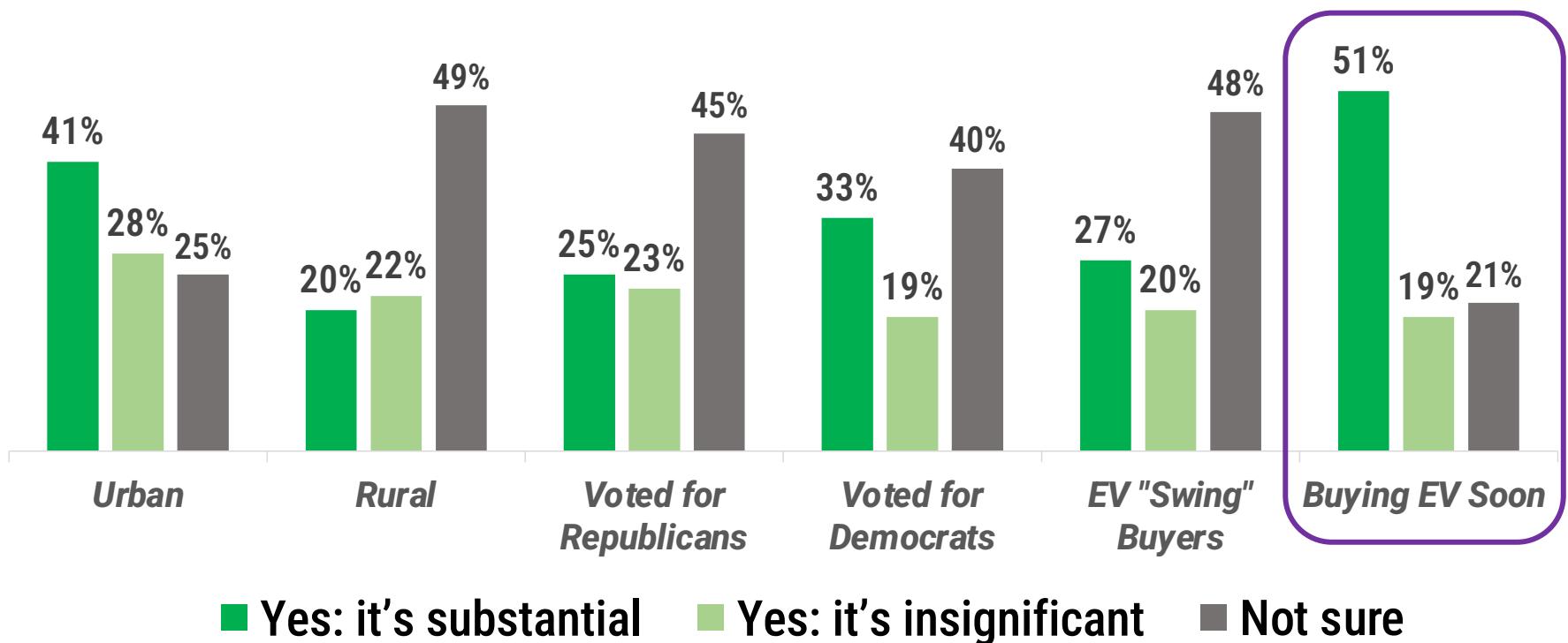


**Impact of Losing Federal EV Subsidies:**  
*The **old problem** was that most consumers were unaware of significant federal EV subsidies. The **new problem** is the federal subsidies are gone.*

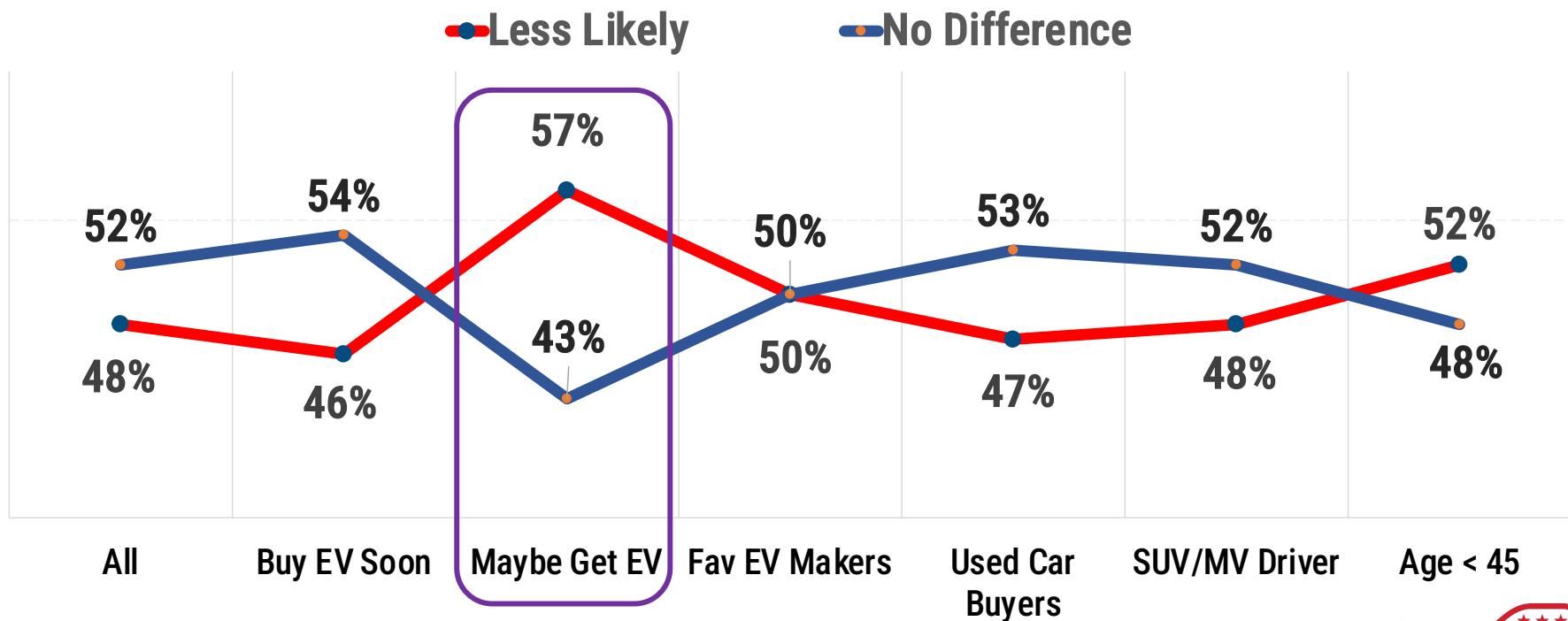
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## Old Problem: EV Rebates Were Unknown to Most Consumers:



**Now, Roughly Half of Consumers Say Loss of Fed EV Subsidies Makes Them *Less Likely* to Buy/Lease EV: (24% say “Much Less Likely”)**



National Survey of 600 Voters with HH Income of \$50K+ representing 67% of U.S. 2020 Electorate

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# How Bad is Loss of Federal EV Subsidies: *Evidence Exists That Impact of Losing Subsidies... is Temporary.*

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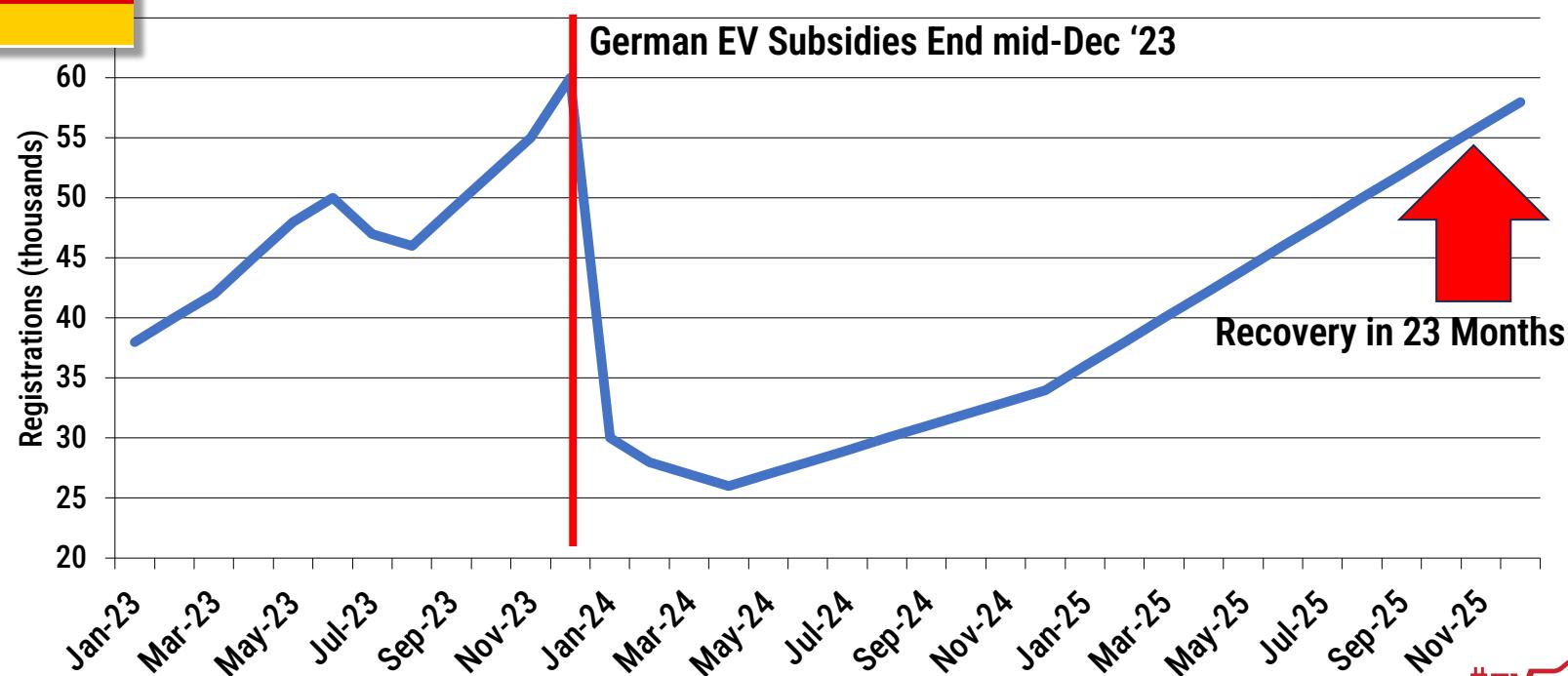


## German Example: Full Recovery to Subsidy Level Sales in 23 Months

Battery-Electric Vehicle (EV) Registrations Jan 2023 – Dec 2025



### Monthly German EV Registrations:



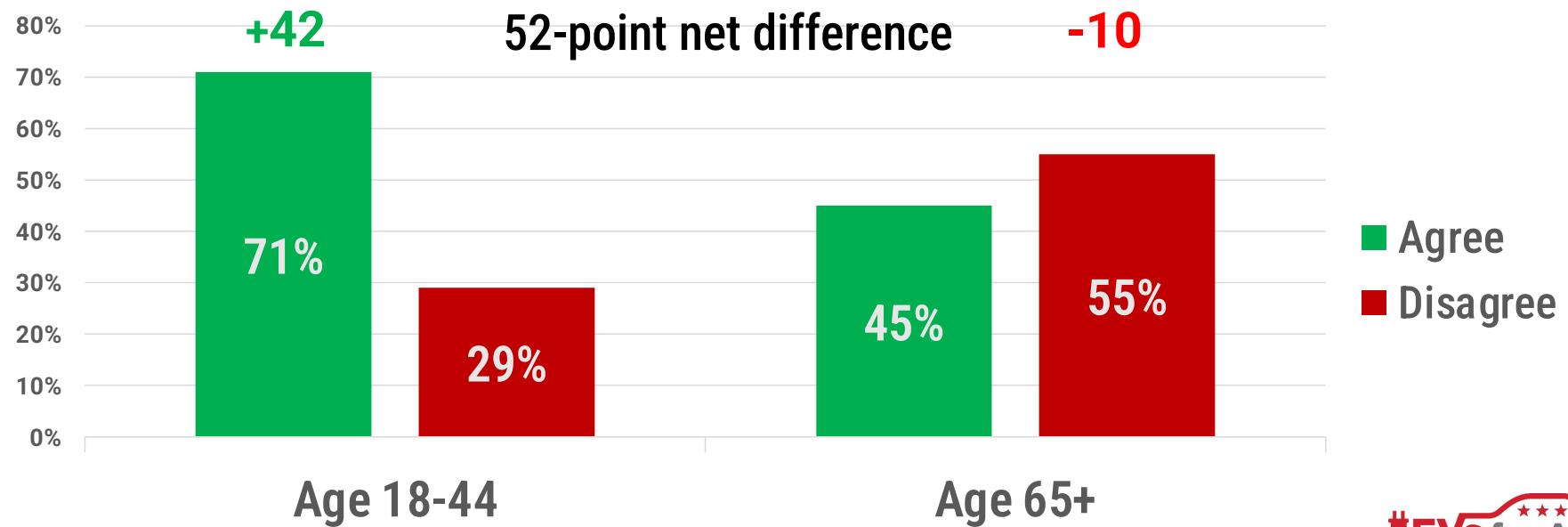
# How Do We Overcome All This and Sell More EVs?

## *What Messages and Tactics Work to Sell More EVs?*

- *Generational Math is Good for Future of EVs*
- *Sell Attributes, not Green Dogma*
- *Leverage Word of Mouth from Existing EV Drivers*
- *Test Drives; 24-48 Hours, Not 20 Minutes*
- *GR: Work State Incentives in Top 15 EV States (80% of all Sales)*
- *Charging, Charging, Charging!*
- *The Huge Multifamily Opportunity for EVs*

# EV Opinions Cut Big by Age... (and Young Consumers Do Rule the Market Over Time)

Agree/Disagree: *"EVs are the future and one day I'll probably drive one."*

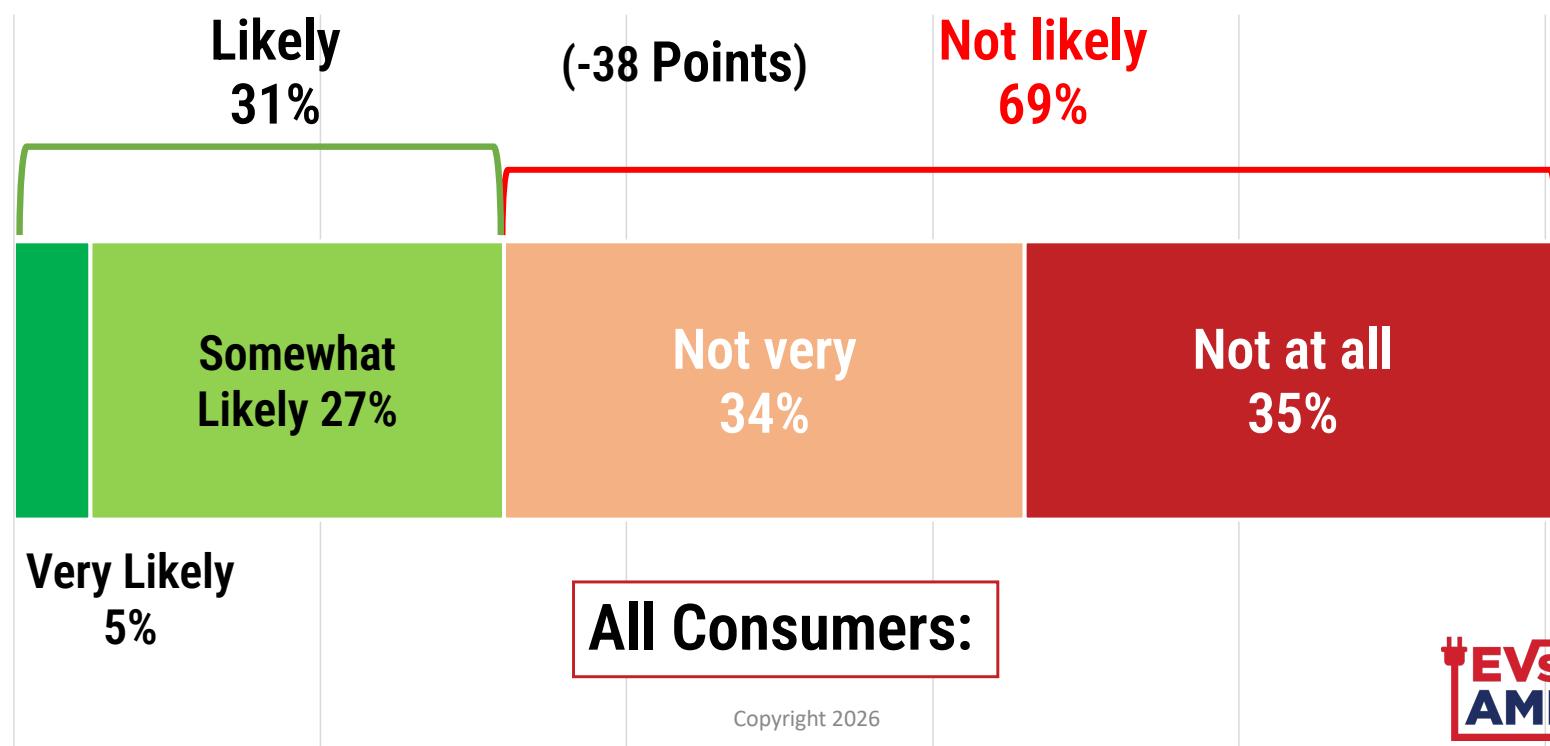


National Survey of 600 Voters with HH Income of \$50K+ representing 67% of U.S. 2024 Electorate. Conducted mid-November 2025 Copyright 2026

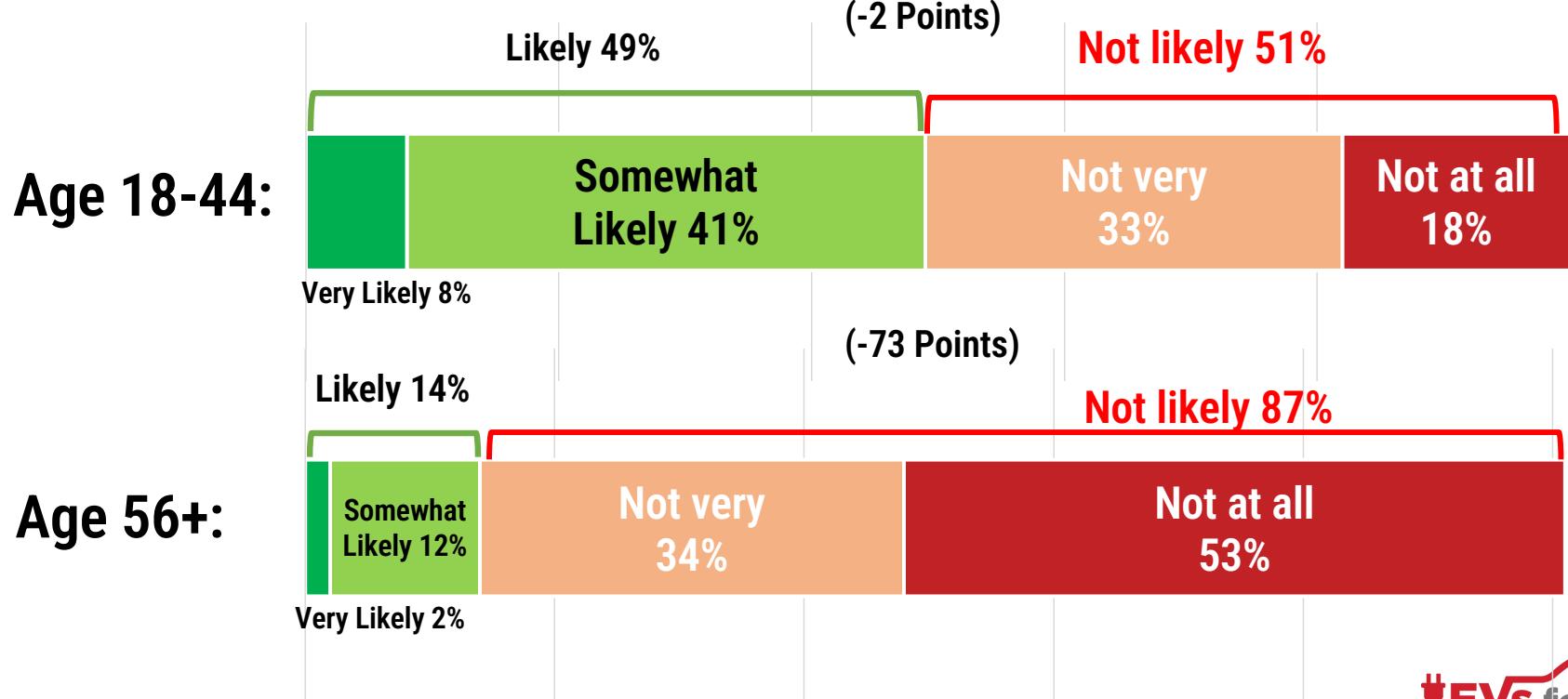


# Good Thing There Are Headwinds in the U.S. to Chinese Cars + EVs!

*How Likely Would You Be to Buy a Chinese-made Automobile?*



# Except Among Buyers Under 44... The Future!



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## Move Messaging Off Green to Vehicle Attributes!

- Fast, More Fun to Drive
- No Gas! Save \$. Fuel in Your Garage
- Less Repair Cost

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## Attributes: Best Reason to Own EV: No More Gas (& Tech, EV \$ rebates)

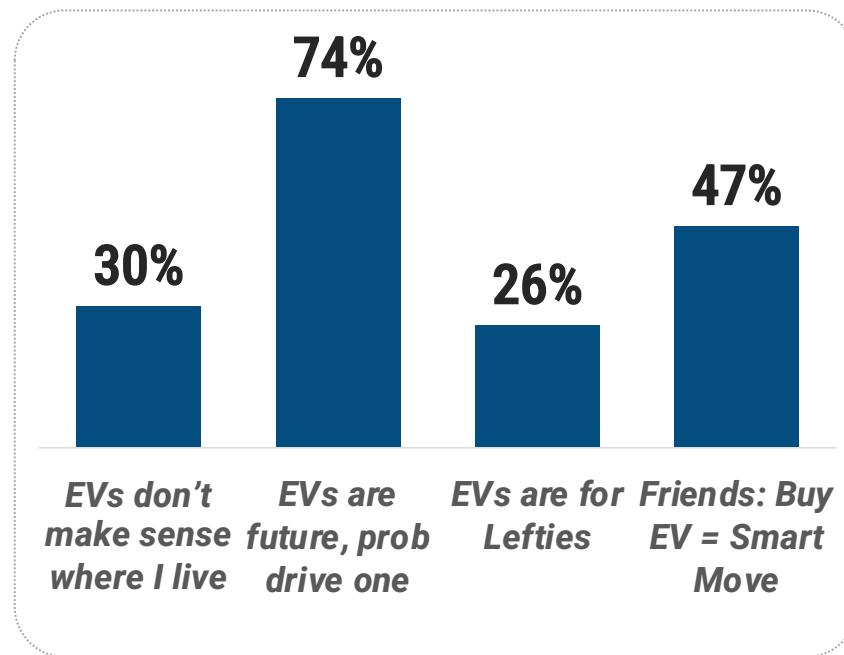
<b><i>Best Combined Reasons to own EV</i></b>	<b><i>Republican</i></b>	<b><i>Democrat</i></b>	<b><i>Independent</i></b>
<i>Never paying for gas</i>	<b>46 %</b>	<b>69 %</b>	<b>53 %</b>
<i>Good for environment</i>	<b>20 %</b>	<b>60 %</b>	<b>44%</b>
<i>Rebate from Government</i>	<b>26 %</b>	<b>22 %</b>	<b>13 %</b>
<i>New technology is appealing:</i>	<b>32 %</b>	<b>24 %</b>	<b>28 %</b>
<i>Sends positive message about me and my values</i>	<b>1 %</b>	<b>3 %</b>	<b>2 %</b>
<i>None, there are no good reasons</i>	<b>34 %</b>	<b>7 %</b>	<b>21 %</b>

## Biggest Concern About Owning an EV? More Agreement: (Cost, Range/Charging Anxiety) + (note China Batteries with R's)

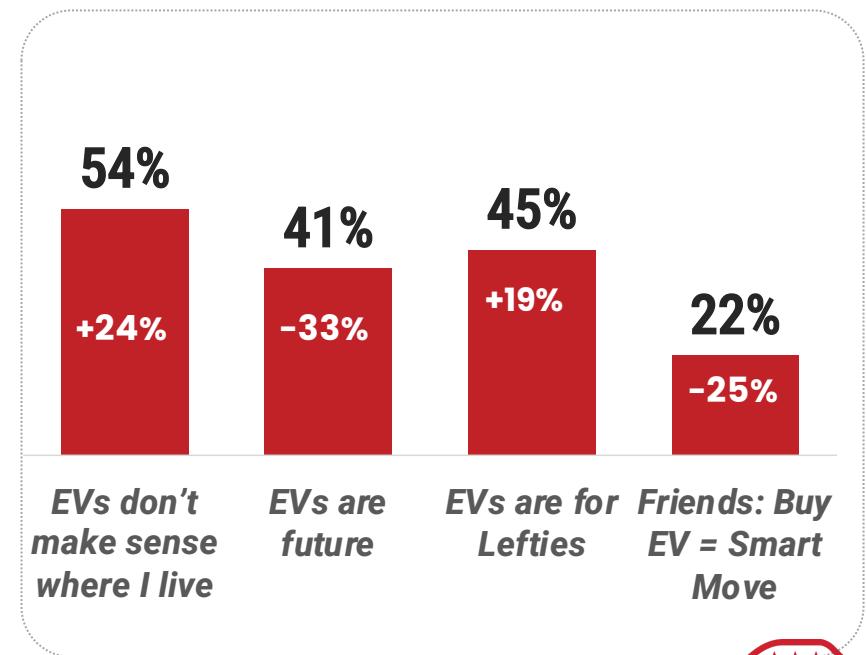
Biggest concern about owning an EV	Republican	Democrat	Independent
<i>Expensive</i>	<b>48%</b>	<b>51%</b>	<b>42%</b>
<i>Insufficient range for trips</i>	<b>59 %</b>	<b>56 %</b>	<b>62 %</b>
<i>Confusing Technology</i>	<b>3 %</b>	<b>3 %</b>	<b>4 %</b>
<i>Charger networks are unreliable</i>	<b>48 %</b>	<b>51 %</b>	<b>47 %</b>
<i>EV batteries from China/bad for environment:</i>	<b>31 %</b>	<b>17 %</b>	<b>23 %</b>

# Word of Mouth: *A Huge Positive Factor in EV Perception*

## Friends with EV (47%)



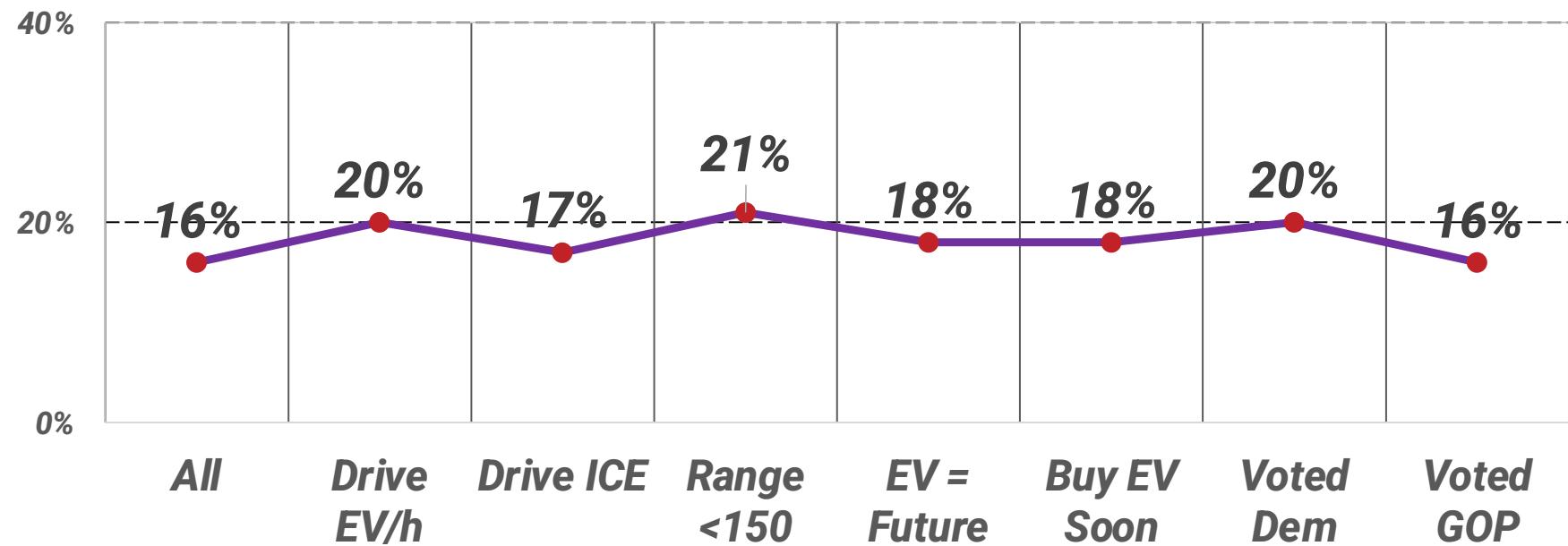
## No Friends with EV (53%)



## Solving Charging Fears is Big Key to Progress:

- *Progress: Charging Fears Declining Since 2024*
- *Consumers Prefer Level 2 Home Charging Above All*
- *Ford Has a Real Winner in Their Power Promise Program*
- *Level 2 Charging in Multifamily Properties is a Huge Opportunity*

# Top Concern about EVs: Charging Networks Unreliable 2023

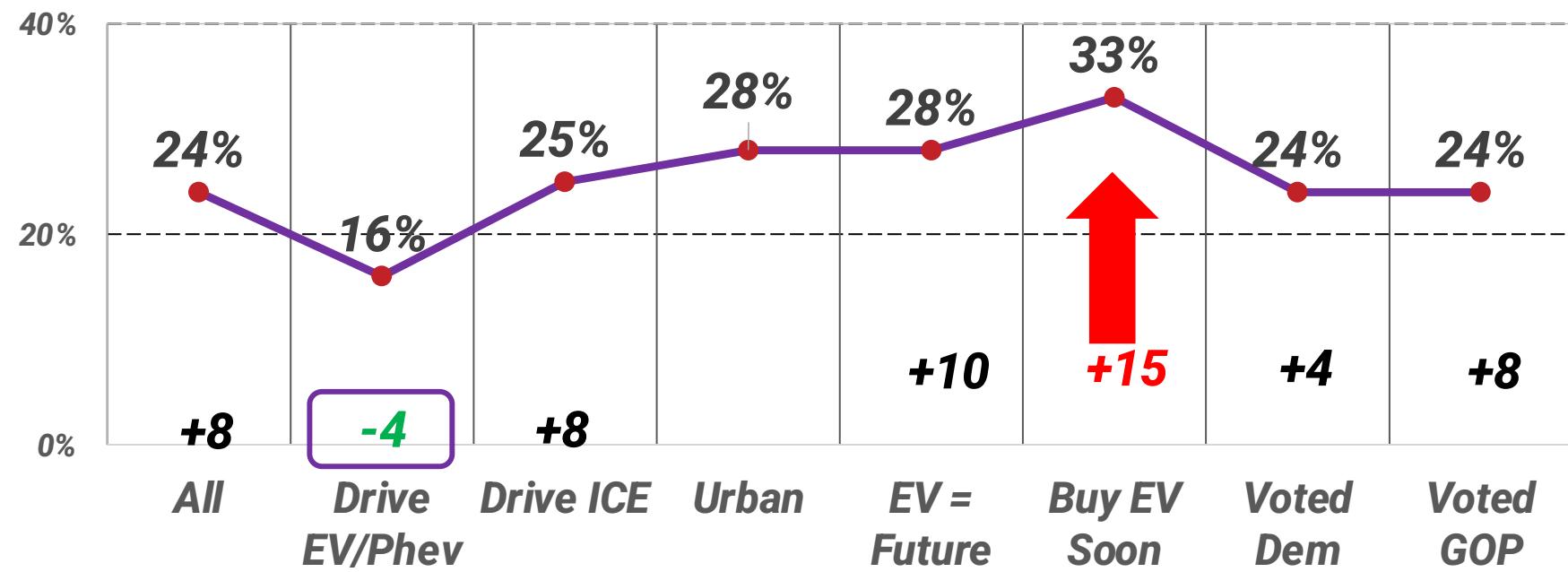


National Survey of 600 Voters with HH Income of \$50K+ representing 67% of U.S. 2020 Electorate

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# Top Concern about EVs: Charging Networks Unreliable 2024

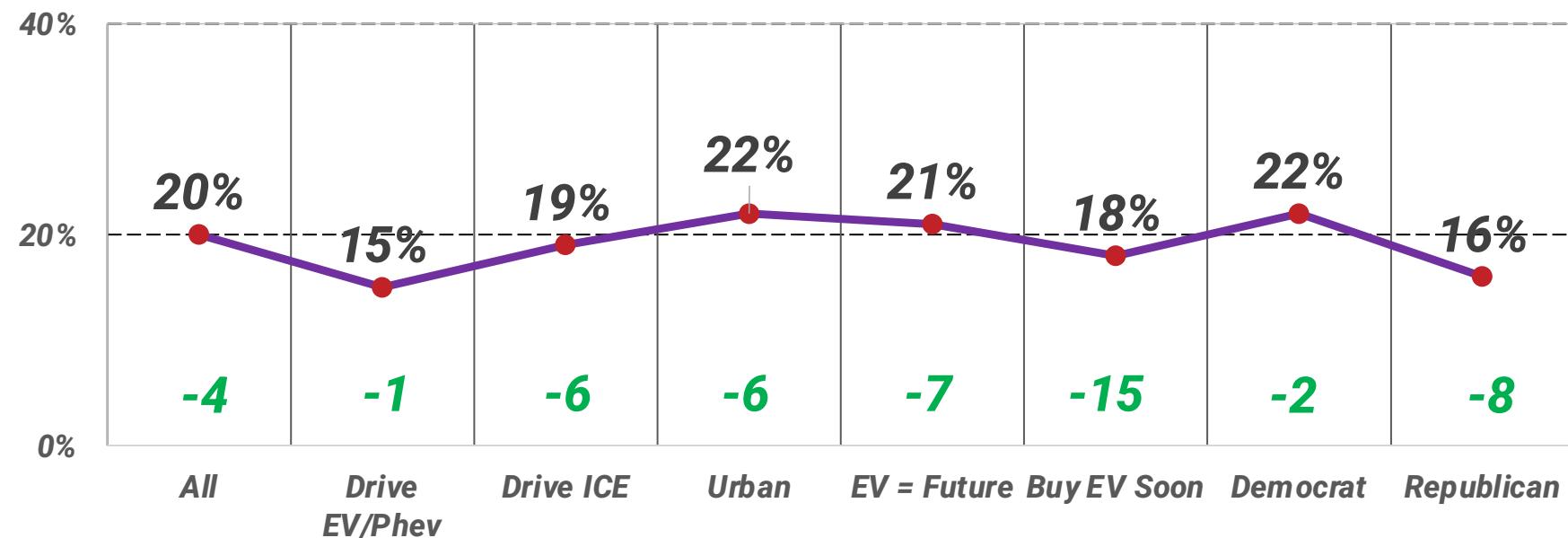


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## Top Concern about EVs: Charging Networks Unreliable 2025



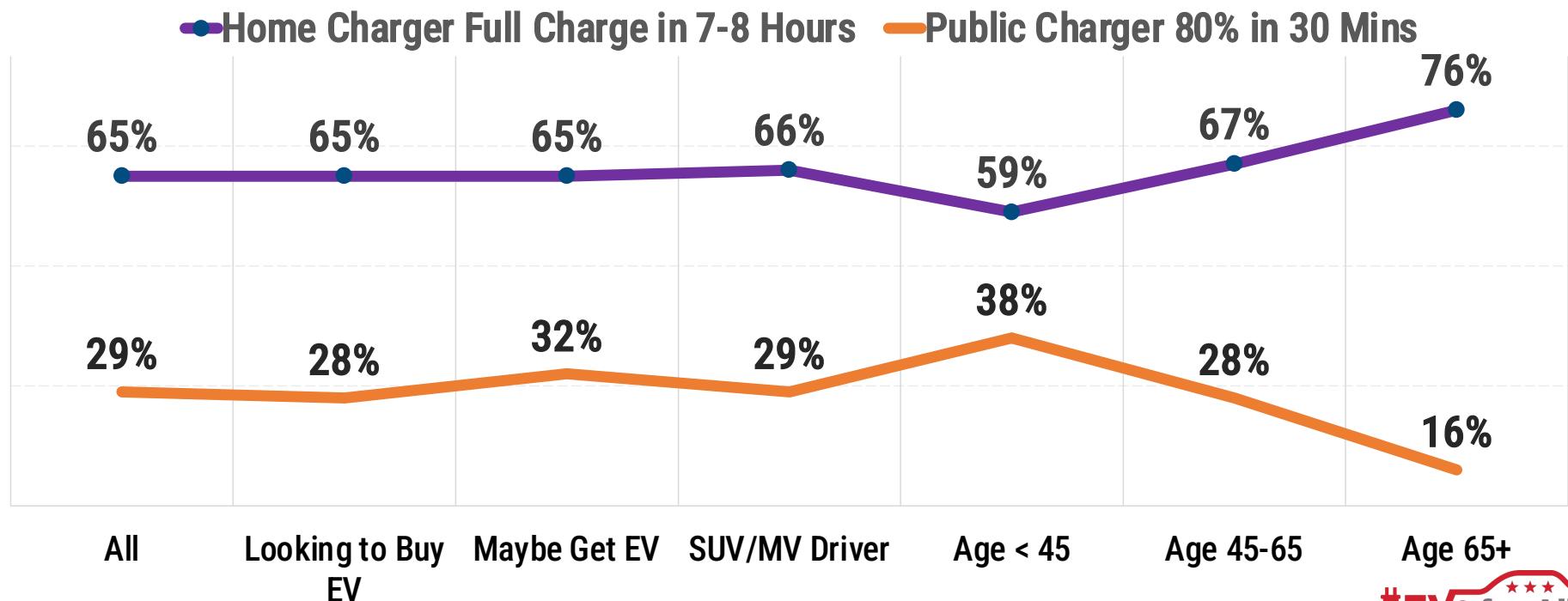
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## If You Owned EV How Would You Prefer to Charge It Most of Time?

*(Home Charger: Full Charge in 7-8 Hours or Public Charging Station 80% Charge in 30 Minutes?)*



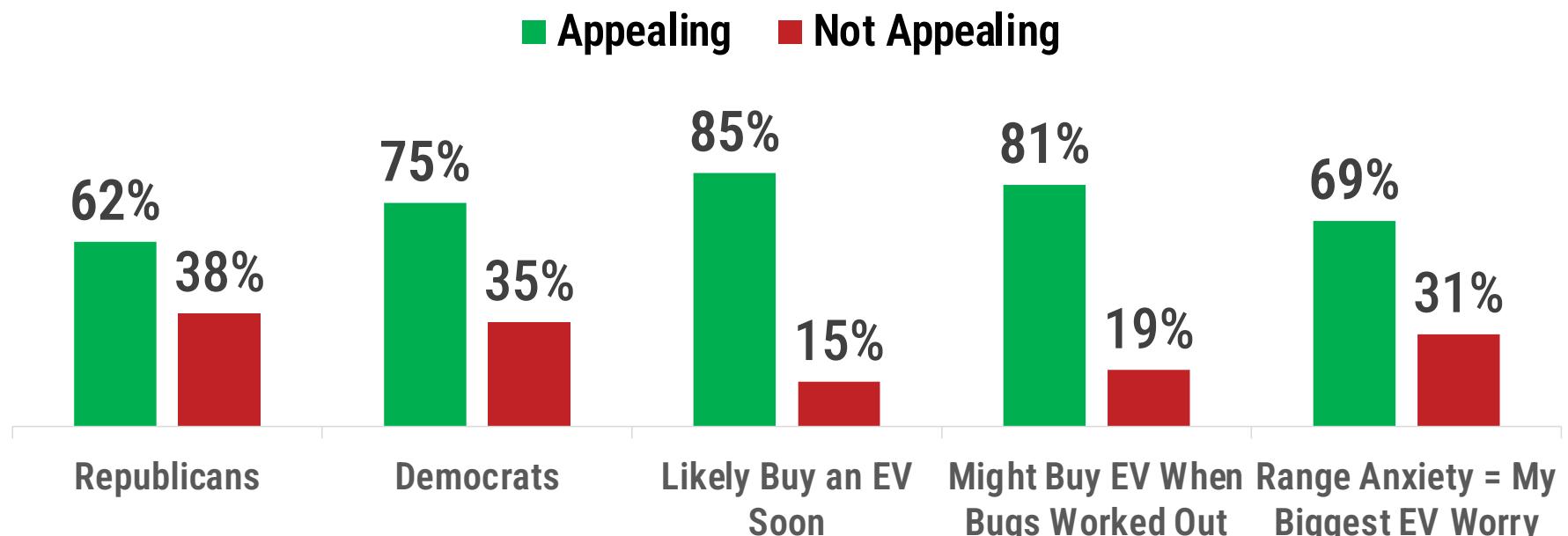
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# Ford's Power Promise Charger Offer is Very Appealing:

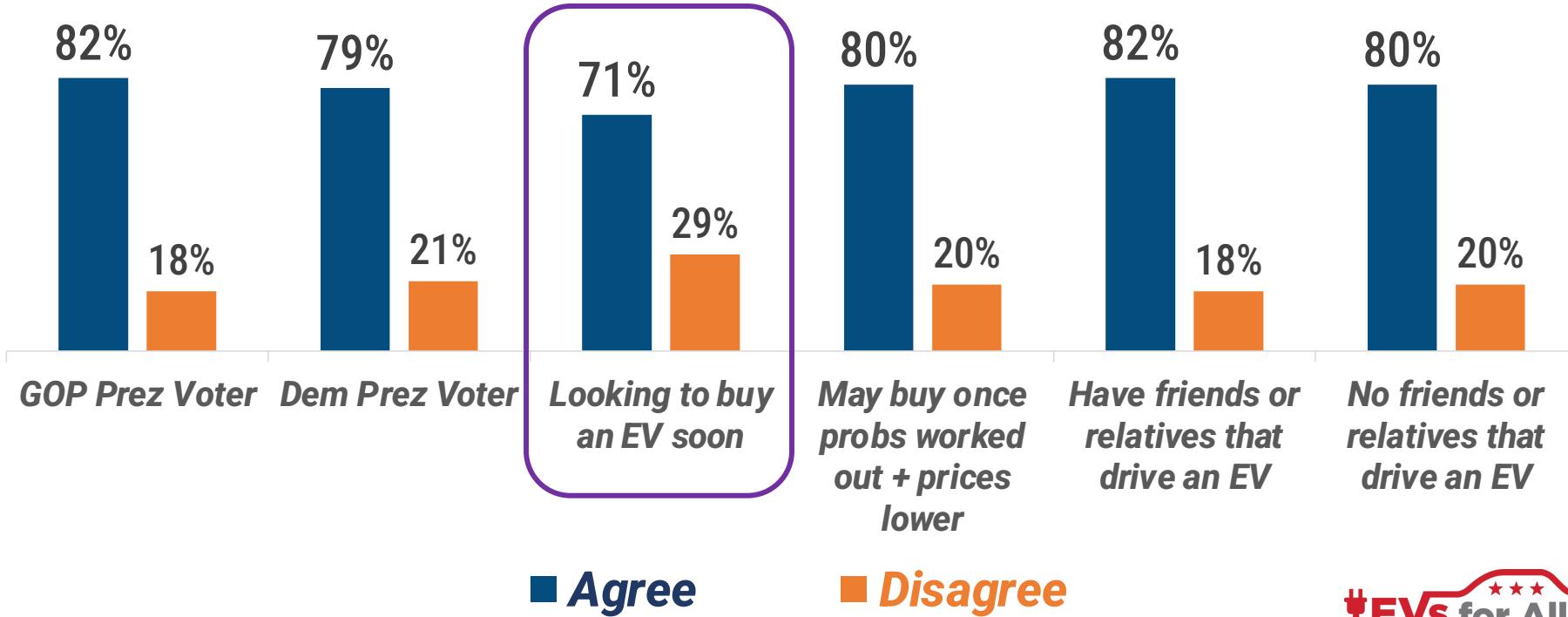
*How Appealing to You is Ford's offer of a complimentary home charger installation to consumers that buy or lease a new Lightning F-150 or Mustang Mach-E SUV EV?*



Nov 2025 National Survey of 600 Voters with HH Income of \$50K+ representing 67% of U.S. 2020 Electorate Copyright 2026



## *Vital to Get Overnight Level 2 Charging into Multifamily Buildings:*



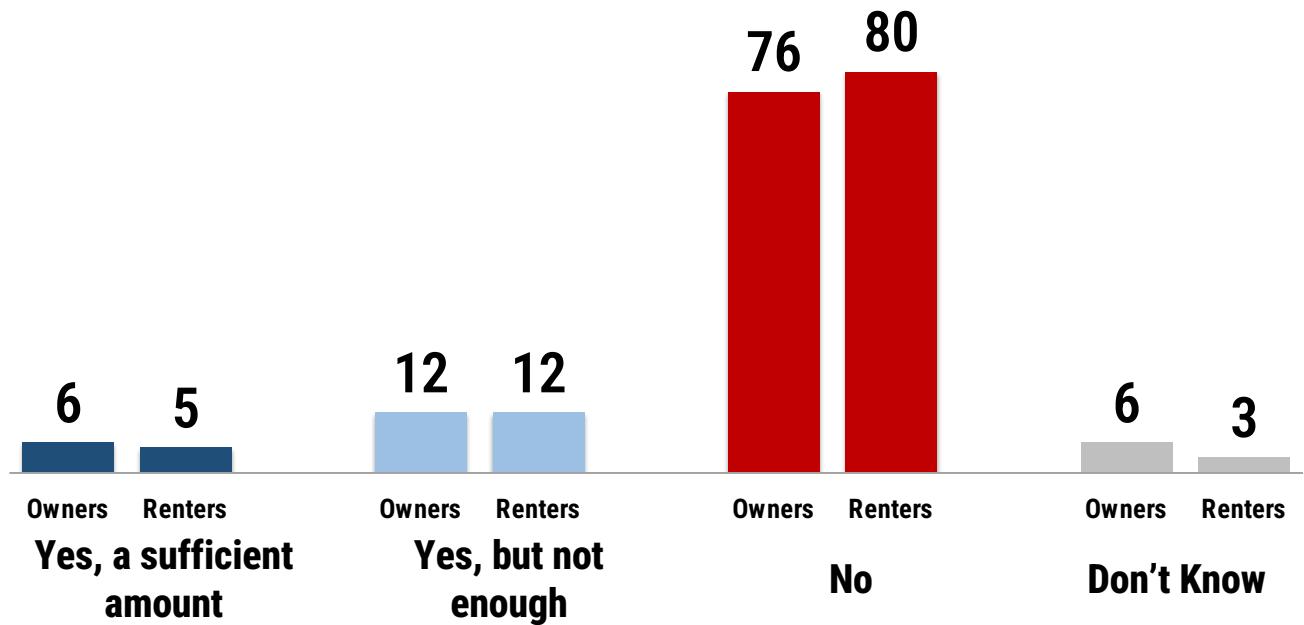
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# Yet, 76%-80% of multi-family residents do not have EV chargers in their buildings:

*Does your apartment or condo building have EV chargers for tenants to use?*



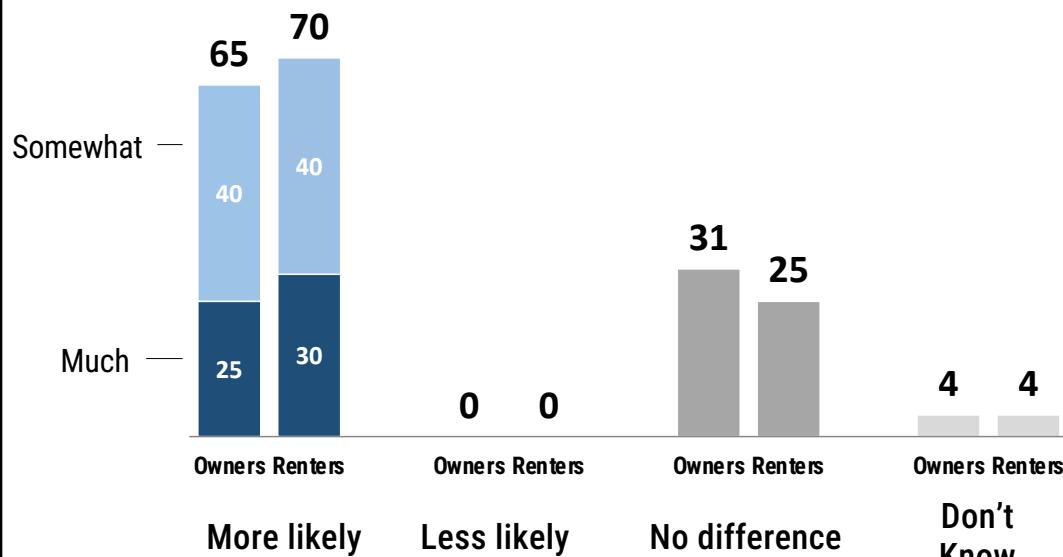
CA Survey of 400 Apartment and Condo Owners, Q3 2025

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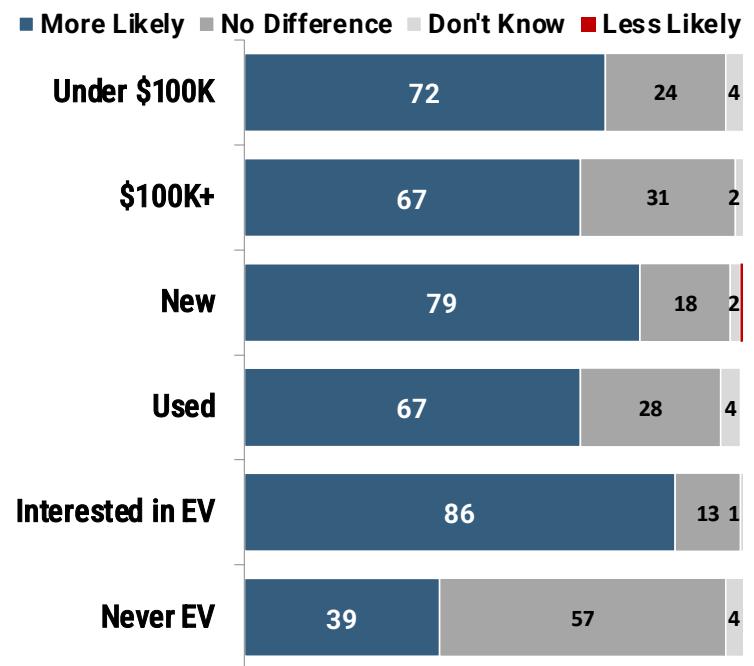
# 65% of owners and 70% of renters say they would be **more likely** to acquire an EV if their building had overnight level 2 charging:

*If your building had overnight charging, that cost at least 40% less than what gas costs for non-electric cars, would that make you more likely or less likely to buy or lease an EV in the future, or wouldn't it make a difference?*



CA Survey of 400 Apartment and Condo Owners, Q3 2025

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## We Polled Just Republicans About EVs, Auto Jobs... and China

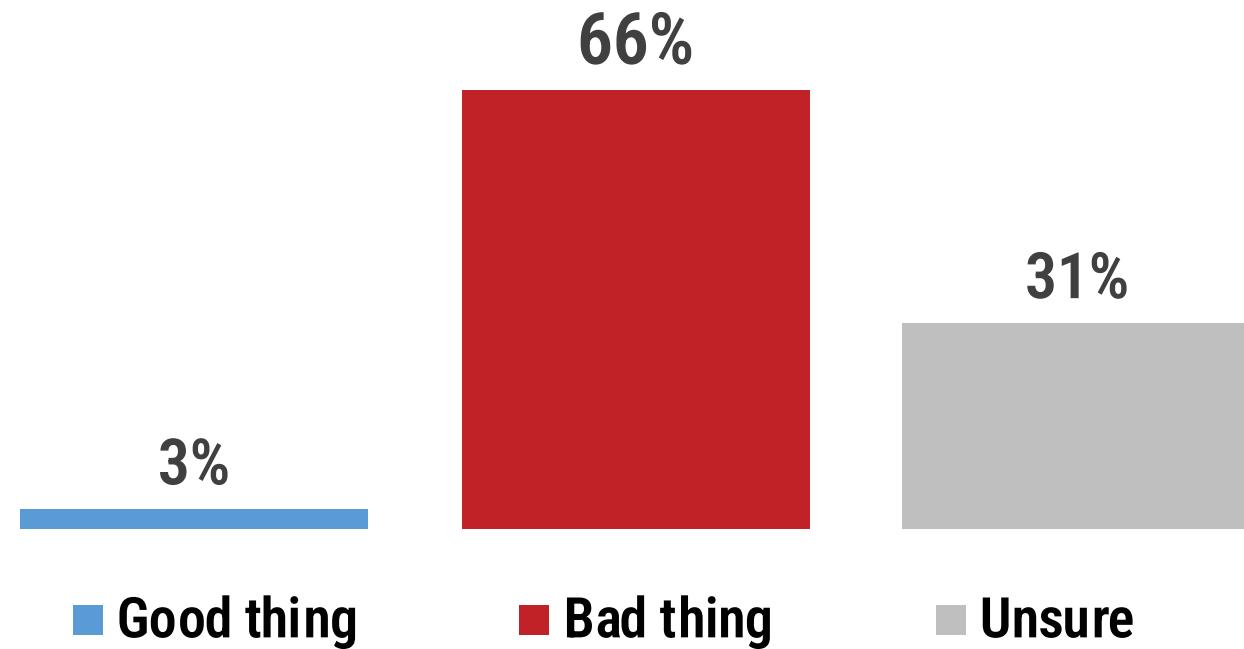
*The best political messaging on EVs to Republicans is Not “Green Cars” but China and the Big Threat to American Auto Manufacturing Jobs (and National Security)*

National Survey of 800 Registered GOP Voters, Oct 2024

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# **“China Manufactured 3 Times as Many Cars as the U.S. Did Last Year. Is That a Good Thing, a Bad Thing or Are You Unsure?”**



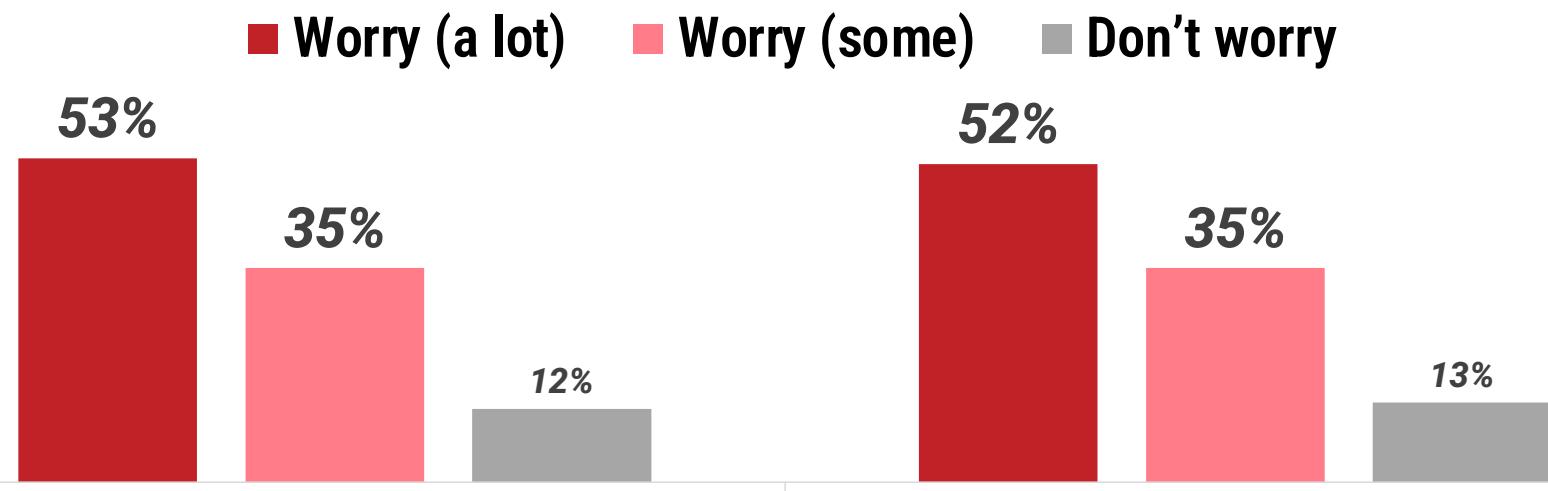
National Survey of 800 GOP voters with \$50K+ HH incomes. Oct 10-15, 2024

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ALLIANCE**

# GOP Voters Have Deep Concerns About Losing U.S. Manufacturing Jobs:

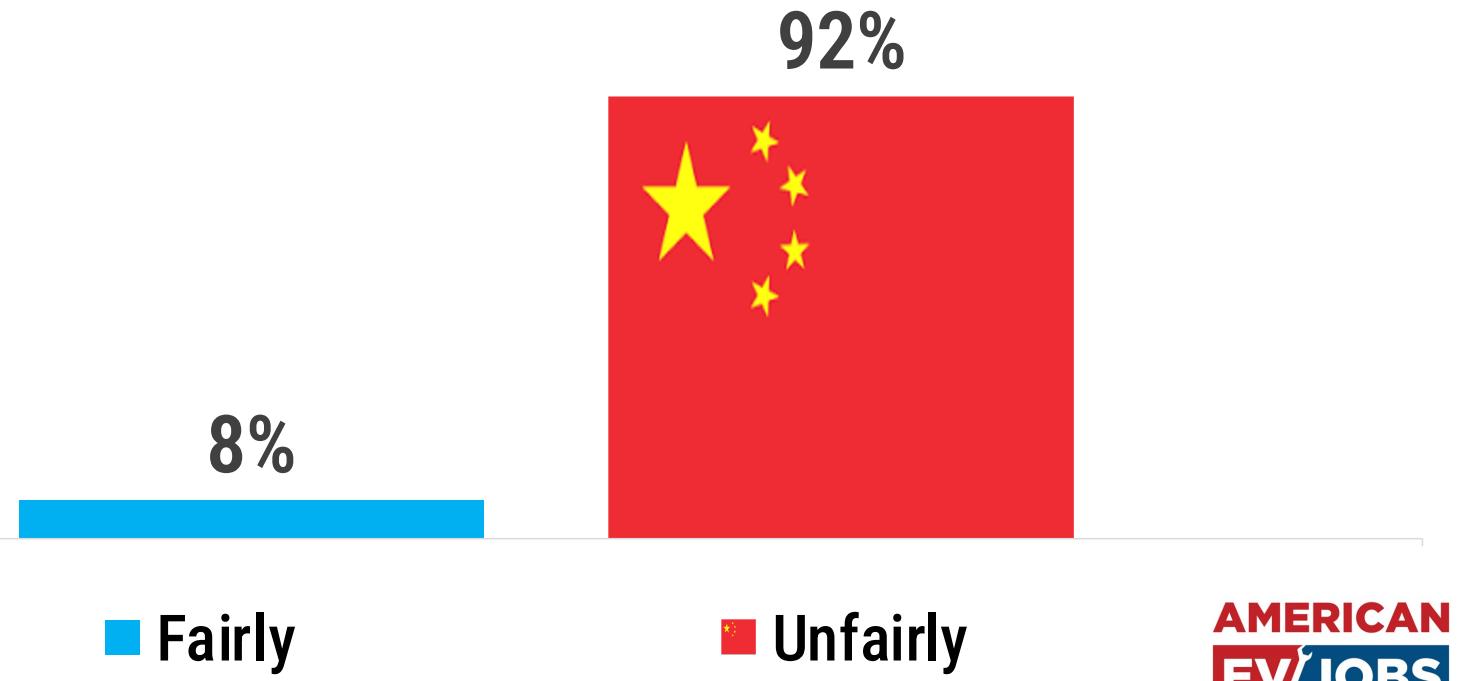
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Our national security may be threatened  
if we lose our industrial base

We are losing too many good-paying  
manufacturing jobs

# “Does China Generally Compete Fairly or Unfairly in International Trade?”



National Survey of 800 GOP voters with \$50K+ HH incomes. Oct 10-15, 2024

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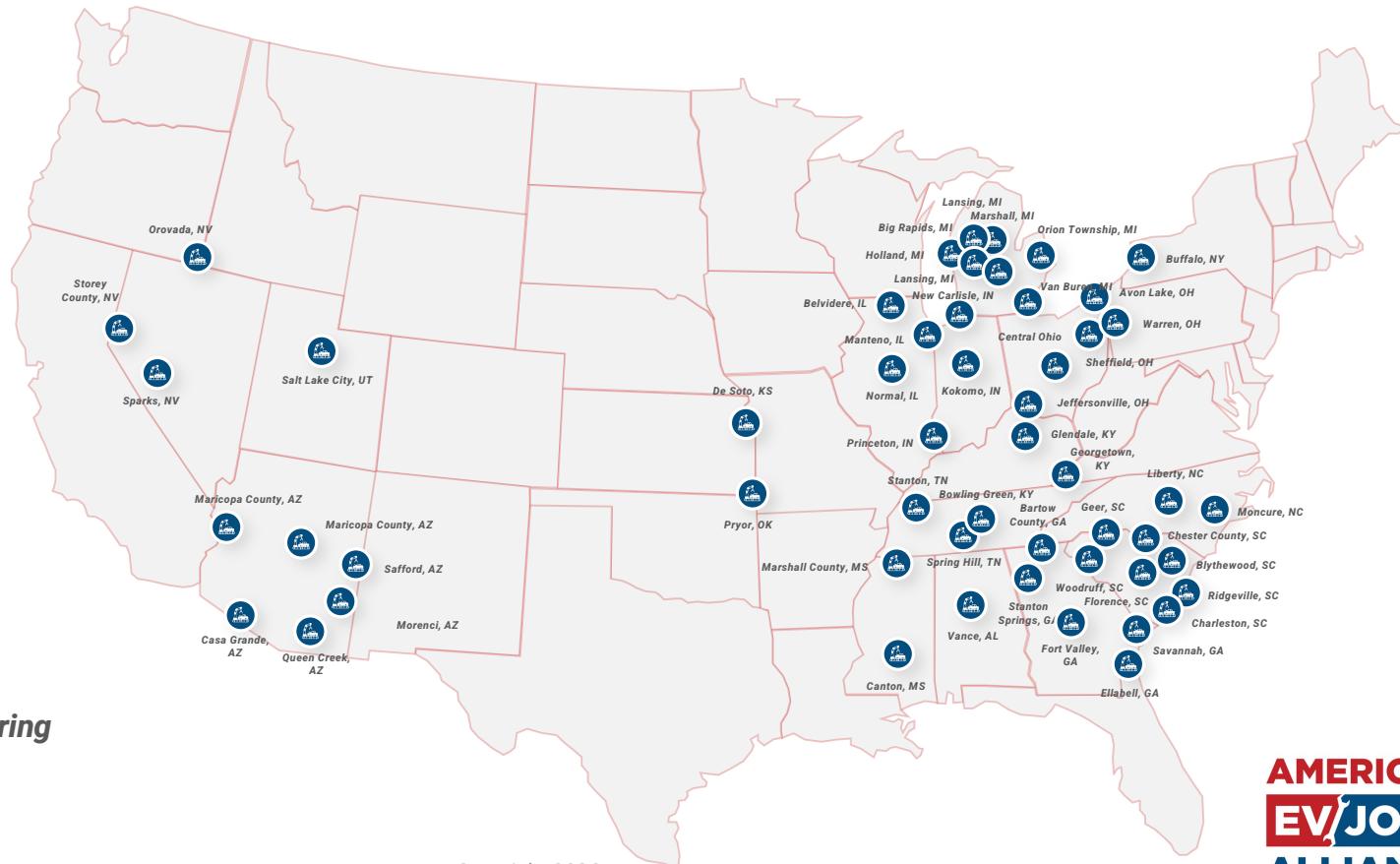
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# EVs = U.S. Manufacturing Jobs:

EV-Related facilities with over \$1B in investment and/or 3,000 jobs...



EV Manufacturing Locations



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A large, stylized silhouette of a car, facing right, is composed of several overlapping shapes. The main body is a light blue shape, with a white shape forming the front wheel and a darker blue shape forming the rear wheel. The car is positioned on the left side of the slide.

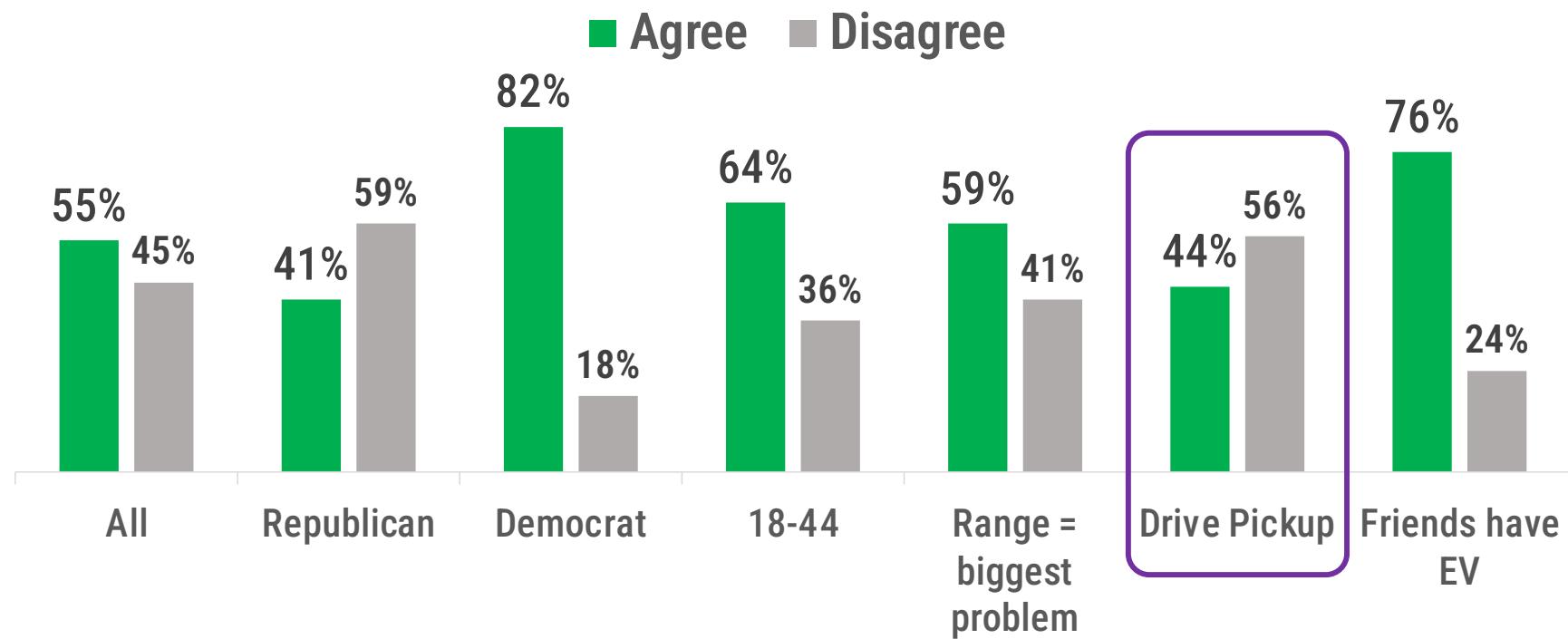
**The Good News...**



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# Agree/Disagree: “EVs are the Future and One Day I’ll Probably Drive One”





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