

January 12, 2026

MESSAGE TESTING ON ELECTRIC VEHICLES:

Survey Results

VELOZ[®] **BSP**.research



OUTLINE

1. About the Survey
2. Key Findings
3. Research Summary

An aerial photograph of a two-lane asphalt road cutting through a dense, lush green forest. Two cars are visible on the road, one in each lane. A large, semi-transparent orange shape is overlaid on the left side of the image, containing the text 'ABOUT THE SURVEY' in white, bold, sans-serif capital letters. The orange shape has a diagonal cutout at the top-left and bottom-right corners.

ABOUT THE SURVEY

MESSAGE TESTING PARTNER: BSP RESEARCH

About BSP Research

BSP Research is a U.S.-based independent research and polling firm with two decades of experience in public opinion, messaging, and data analysis, especially across diverse and under-represented communities.

This firm emphasizes cultural competence in research design and interpretation to ensure results accurately reflect the perspectives of diverse audiences. Recognized for rigorous methodology and expertise in survey design, focus groups, and analytical interpretation.

Analytical Approach & Methods

BSP's approach prioritizes high-quality, representative data so that insights are reliable and actionable.

Their research includes both qualitative (e.g., focus groups) and quantitative (e.g., polling) methods tailored to specific audiences and communications objectives.

Credibility & Track Record

Works with a broad array of clients including political campaigns, advocacy organizations, academic institutions, media outlets, and community groups.

Known for producing research that reaches key decision-makers and contributes to strategic communications, policy discussions, and public understanding.

Certified as a Minority-Owned Business, underscoring its leadership and perspective in research on diverse populations.



METHODOLOGY

- Total N=1,800 adults in the United States (+/- 3.1%)
 - All respondents have a driver's license and none own electric vehicles
- Shipyard defined four geographic tiers based on propensity to purchase an EV
 - Tier 1 (N=600): CO, CT, DC, DE, MD, MA, MN, NJ, NM, NY, OR, PA, RI, VT, VA, WA
 - Tier 2 (N=500): AZ, FL, GA, HI, IL, IN, ME, MI, NV, NH, NC, OH, TX, UT, WI
 - Tier 3 (N=300): AL, AK, AR, ID, IA, KS, KY, LA, MS, MO, MT, NE, ND, OK, SC, SD, TN, WV, WY
 - California (N=400):
- Field Dates: December 15 - 23, 2025
- Survey completed online, and available in English and Spanish

An aerial photograph of a two-lane asphalt road cutting through a dense, lush green forest. Two cars are visible on the road, one in each lane. A large, semi-transparent orange shape is overlaid on the left side of the image, containing the text 'KEY FINDINGS' in white, bold, sans-serif capital letters. The orange shape has a diagonal cutout at the top-left and bottom-right corners.

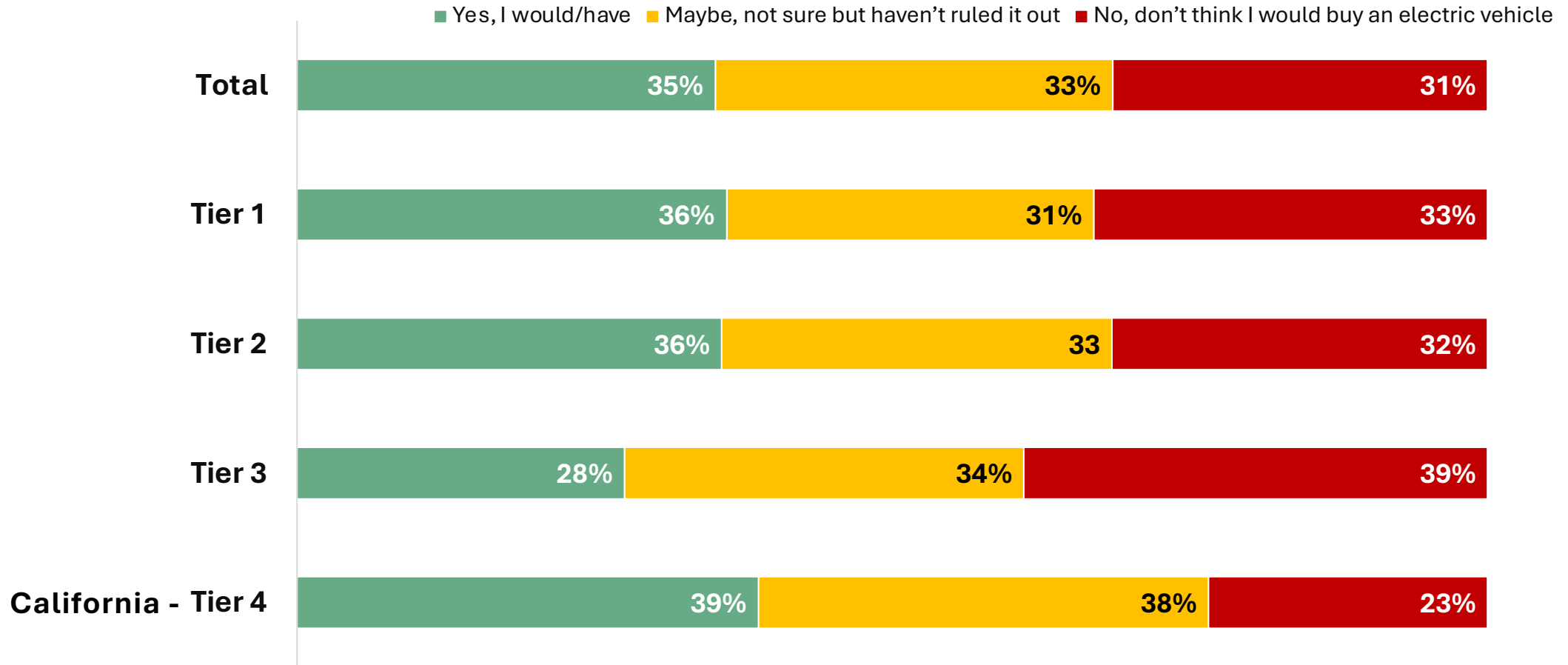
KEY FINDINGS

KEY FINDINGS

- For all consumers, there is a dearth of information on EVs. Every tier showed meaningful improvement after learning more about EVs.
- Every demographic group, identity, political persuasion and geography shifted toward greater interest in EVs.
- Costs are an urgent matter and cost messages on energy and maintenance were persuasive.
- Beyond costs, standout messages included reassurance about range, the ability to charge while you sleep, and the variety of EVs available to suit consumer needs.
 - These fall directly into the “information” category, meaning they were attributes less known to the consumers.
- Environmental messages on benefits did better than macro-economic and global concerns.
- Respondents enthusiastically agreed that EVs make the air cleaner, the community healthier, reduce our dependence on foreign oil.
- Improvement was greater in Tiers 2 and 3 than in Tier 1.
- California remains an outlier—beginning the study with greater enthusiasm for EVs and yet still increasing in willingness more than all of the other Tiers.

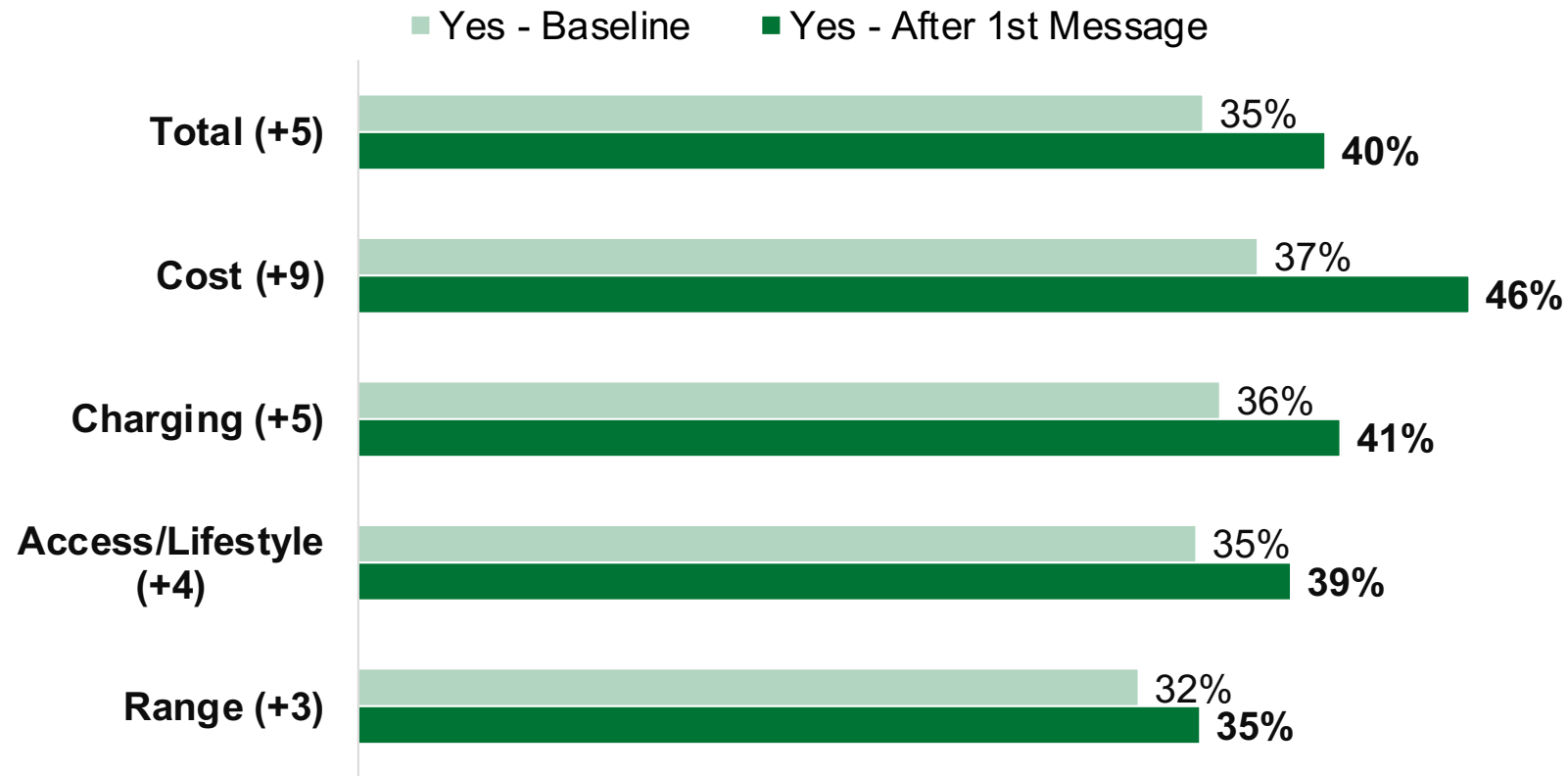
BASELINE INTEREST IN BUYING AN EV

Would you ever consider, or have you ever considered, buying a fully electric car? [Baseline response]



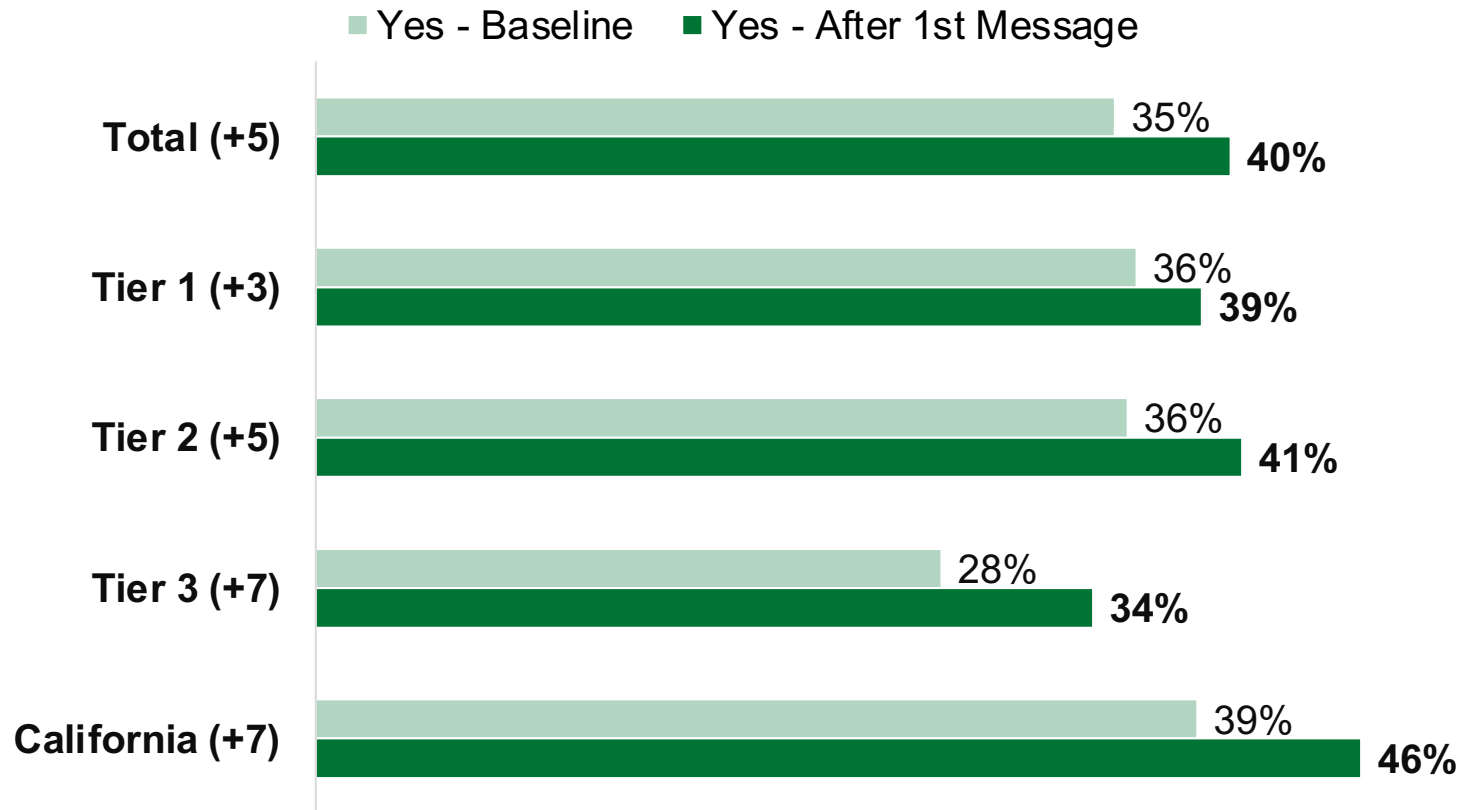
INTEREST IN PURCHASING AN ELECTRIC VEHICLE AFTER FIRST MESSAGE EXPOSURE – BY MESSAGE THEME

Would you ever consider, or have you ever considered, buying a fully electric car? (yes responses illustrated)



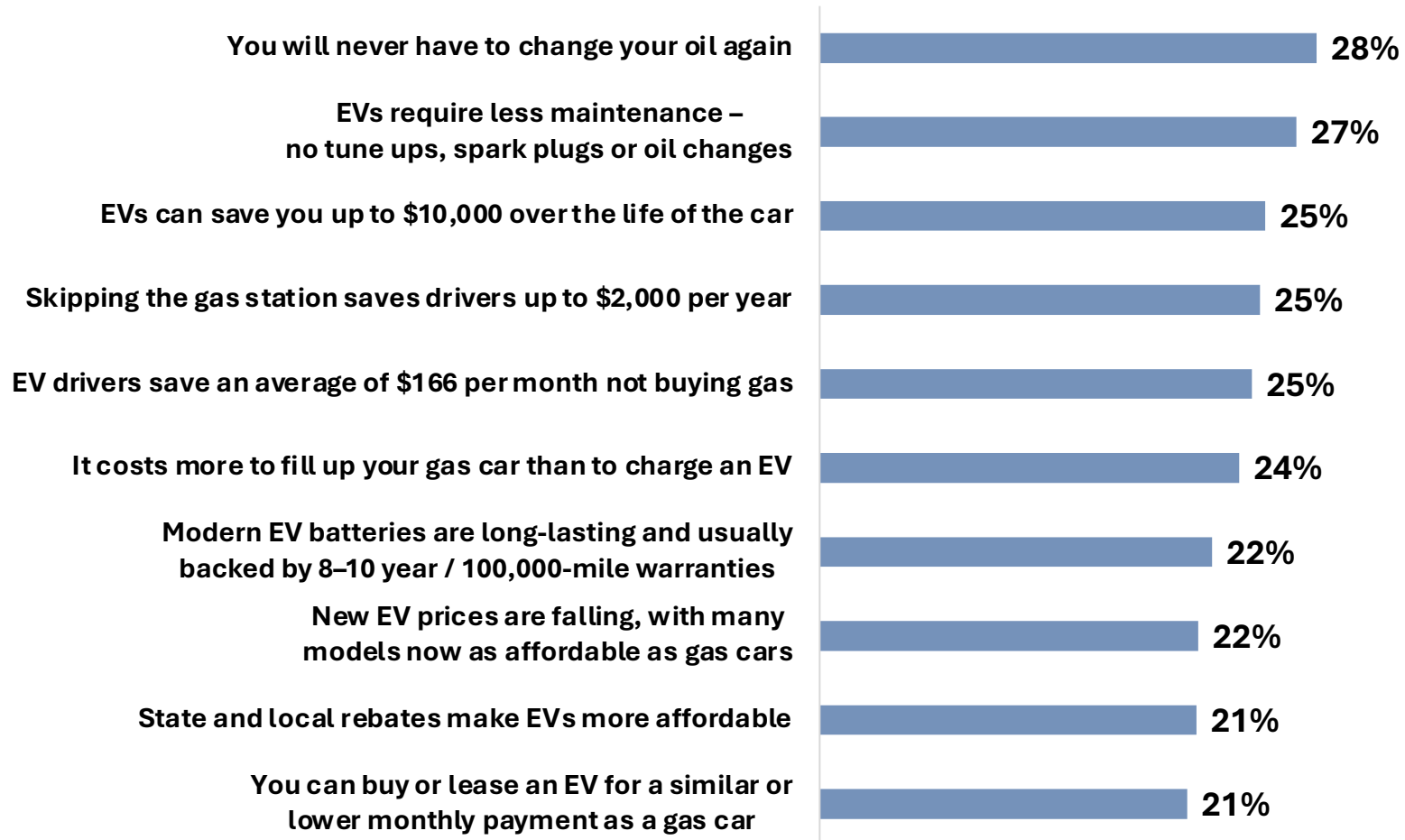
INTEREST IN PURCHASING AN ELECTRIC VEHICLE AFTER FIRST MESSAGE EXPOSURE – BY TIER

Would you ever consider, or have you ever considered, buying a fully electric car? (yes responses illustrated)



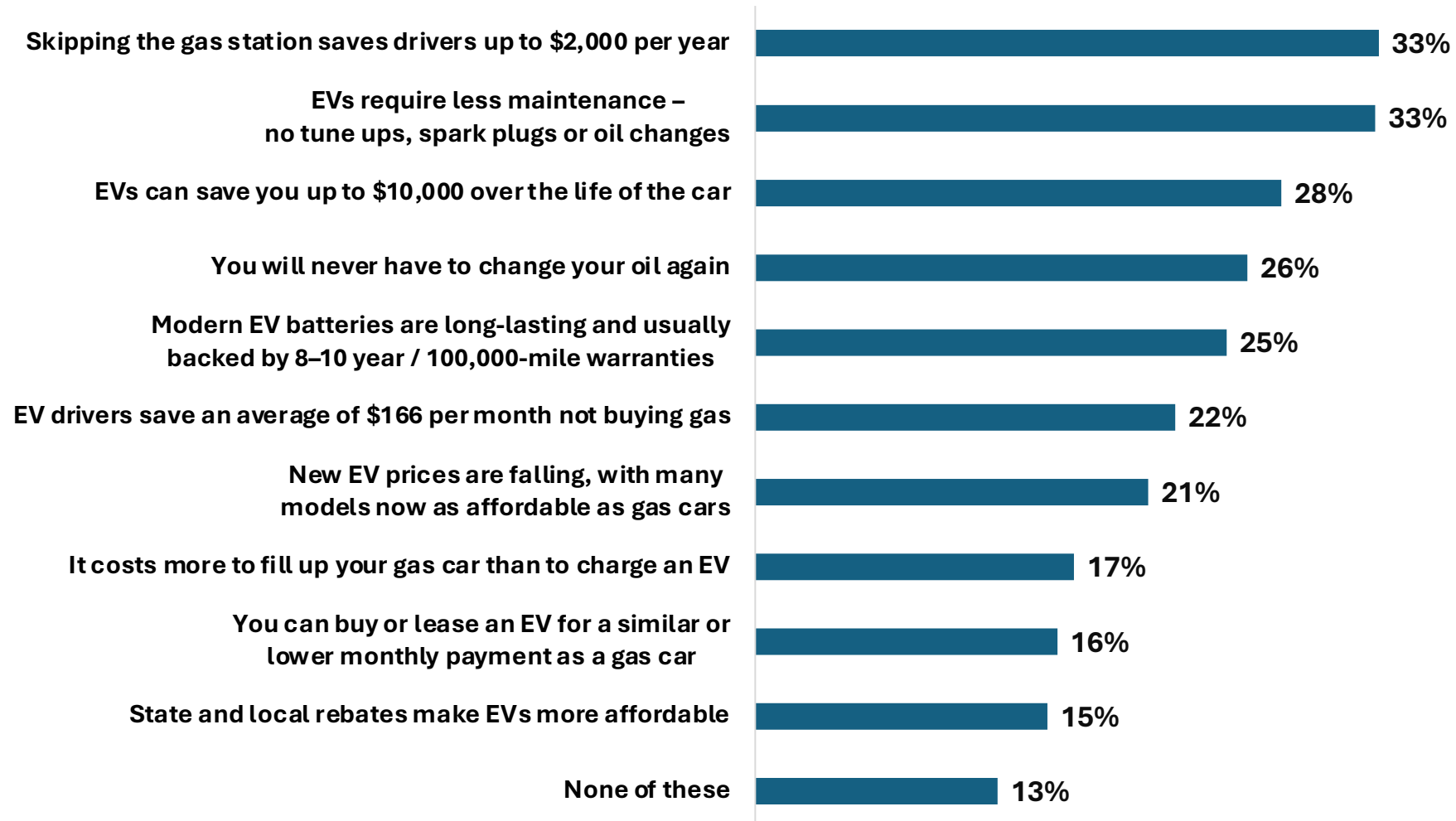
COST MESSAGES

On a scale of 1 to 5, how motivating are the following statements in encouraging you to choose an EV over a gas car? Percentage of respondents rating the messages extremely motivating are illustrated.



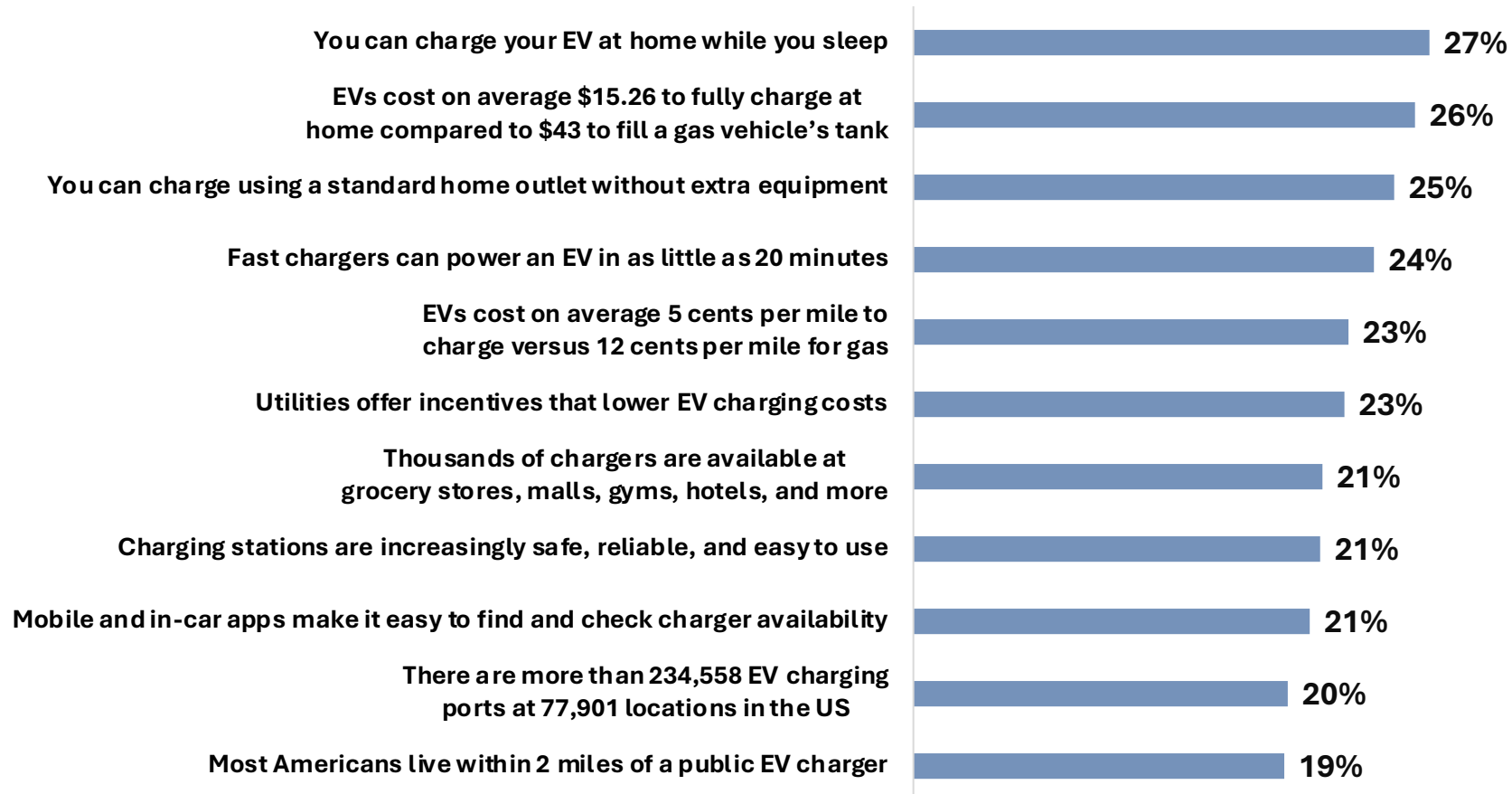
COST MESSAGES – SUMMARY RESULTS

Which of the following statements do you find the most motivating? Select up to 3.



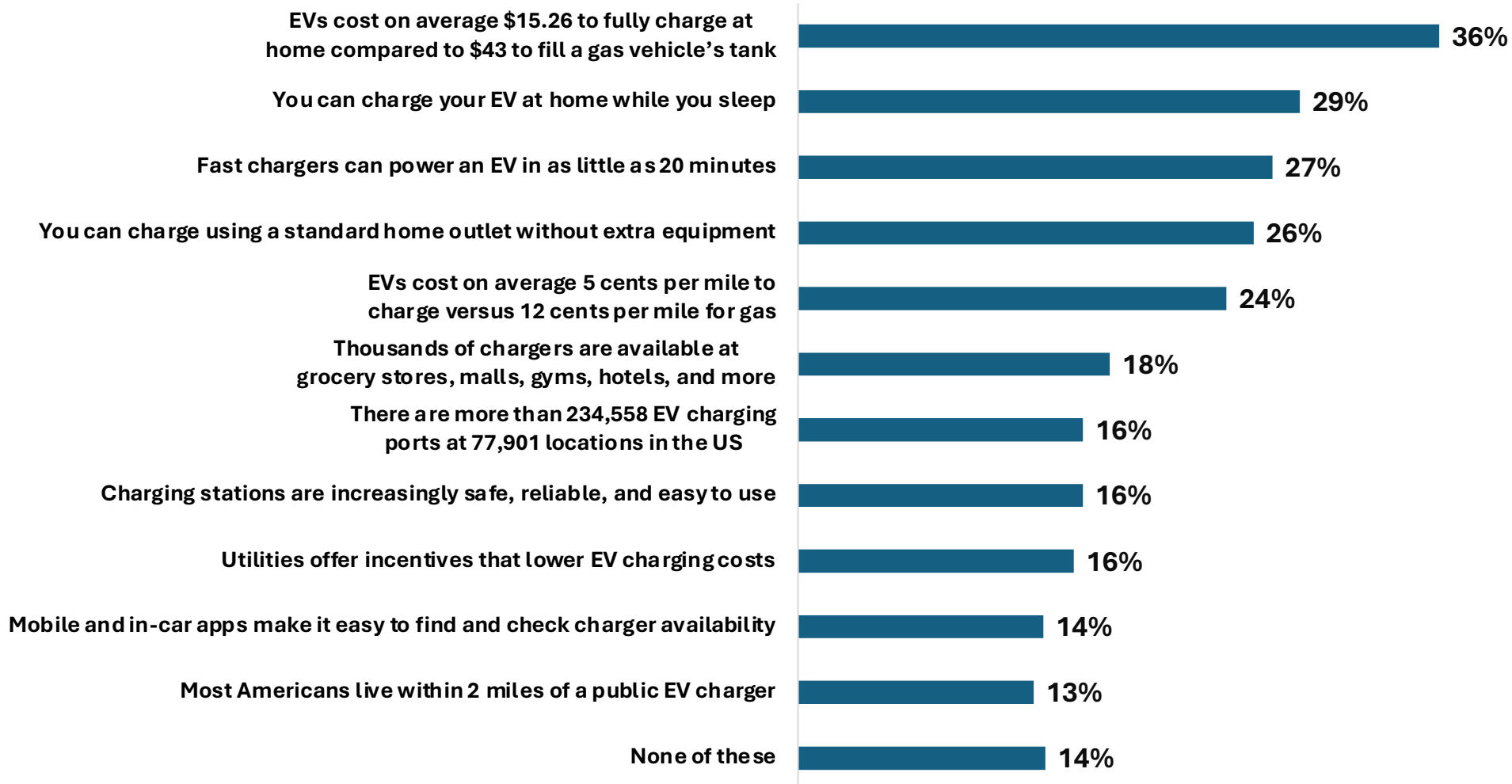
CHARGING MESSAGES

On a scale of 1 to 5, how motivating are the following statements in encouraging you to choose an electric vehicle (EV) over a gas car? Percentage of respondents rating the messages extremely motivating are illustrated.



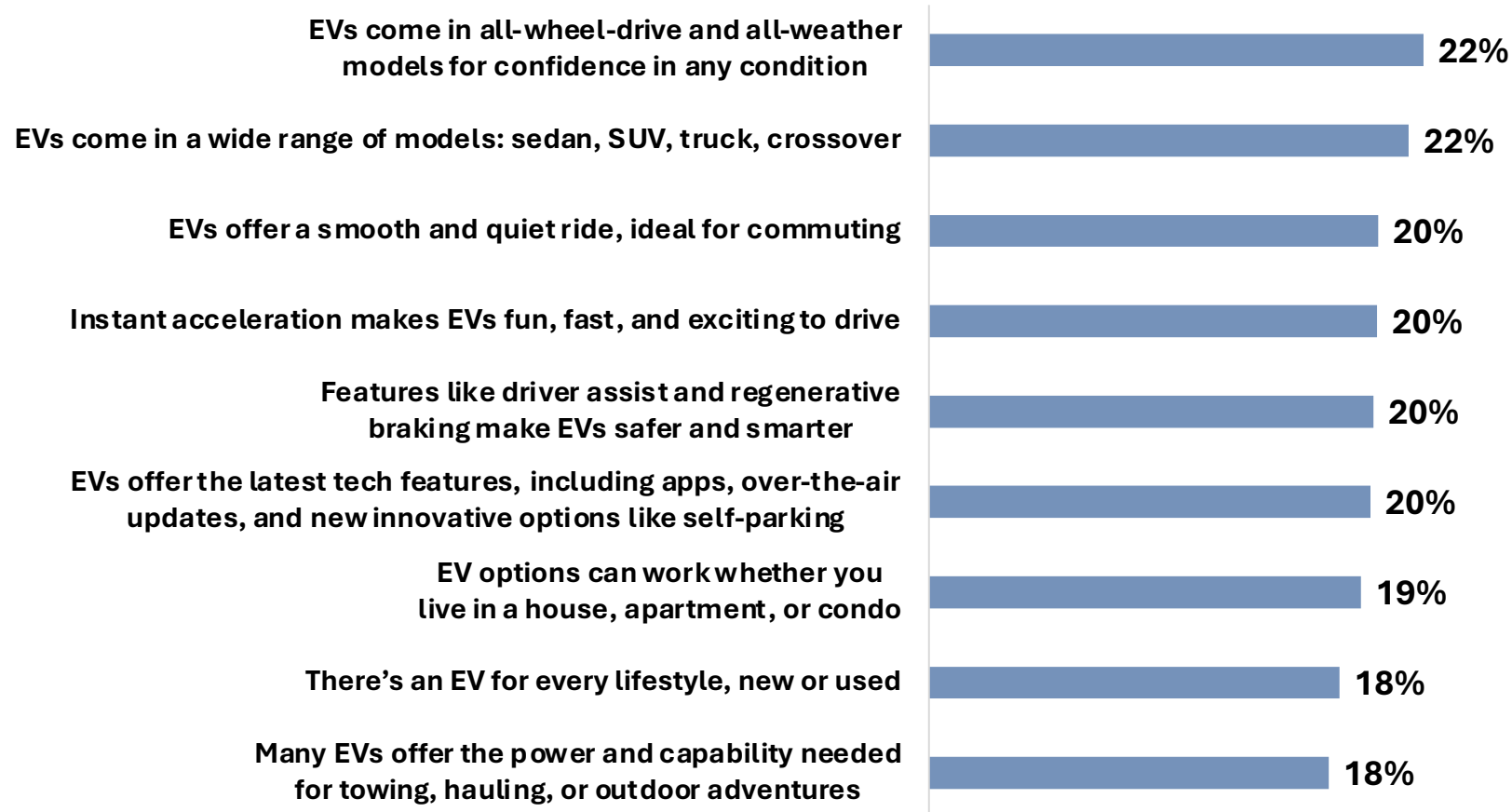
CHARGING MESSAGES SUMMARY RESULTS

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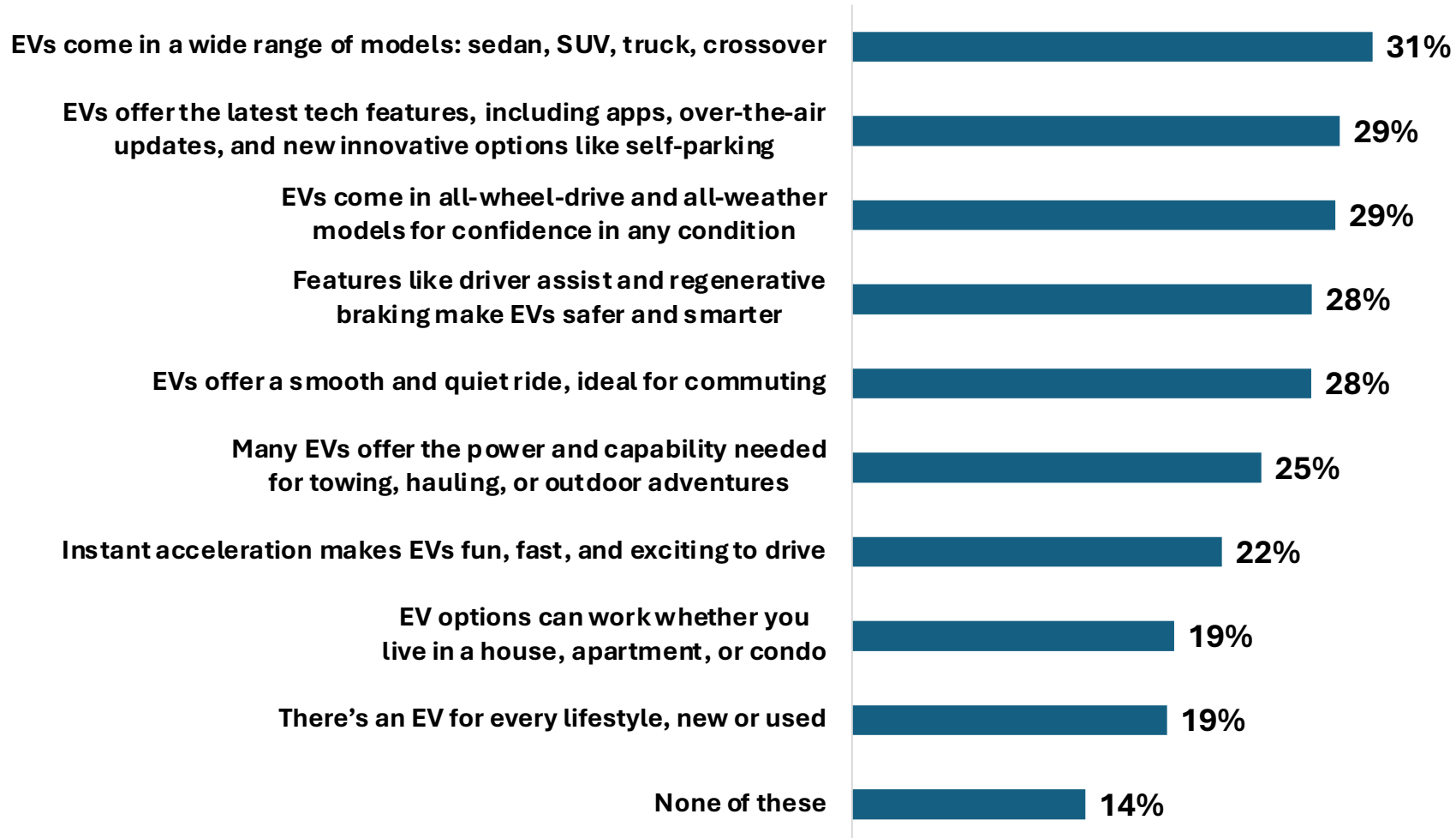
ACCESSIBILITY/LIFESTYLE MESSAGES

On a scale of 1 to 5, how motivating are the following statements in encouraging you to choose an electric vehicle (EV) over a gas car? Percentage of respondents rating the messages extremely motivating are illustrated.



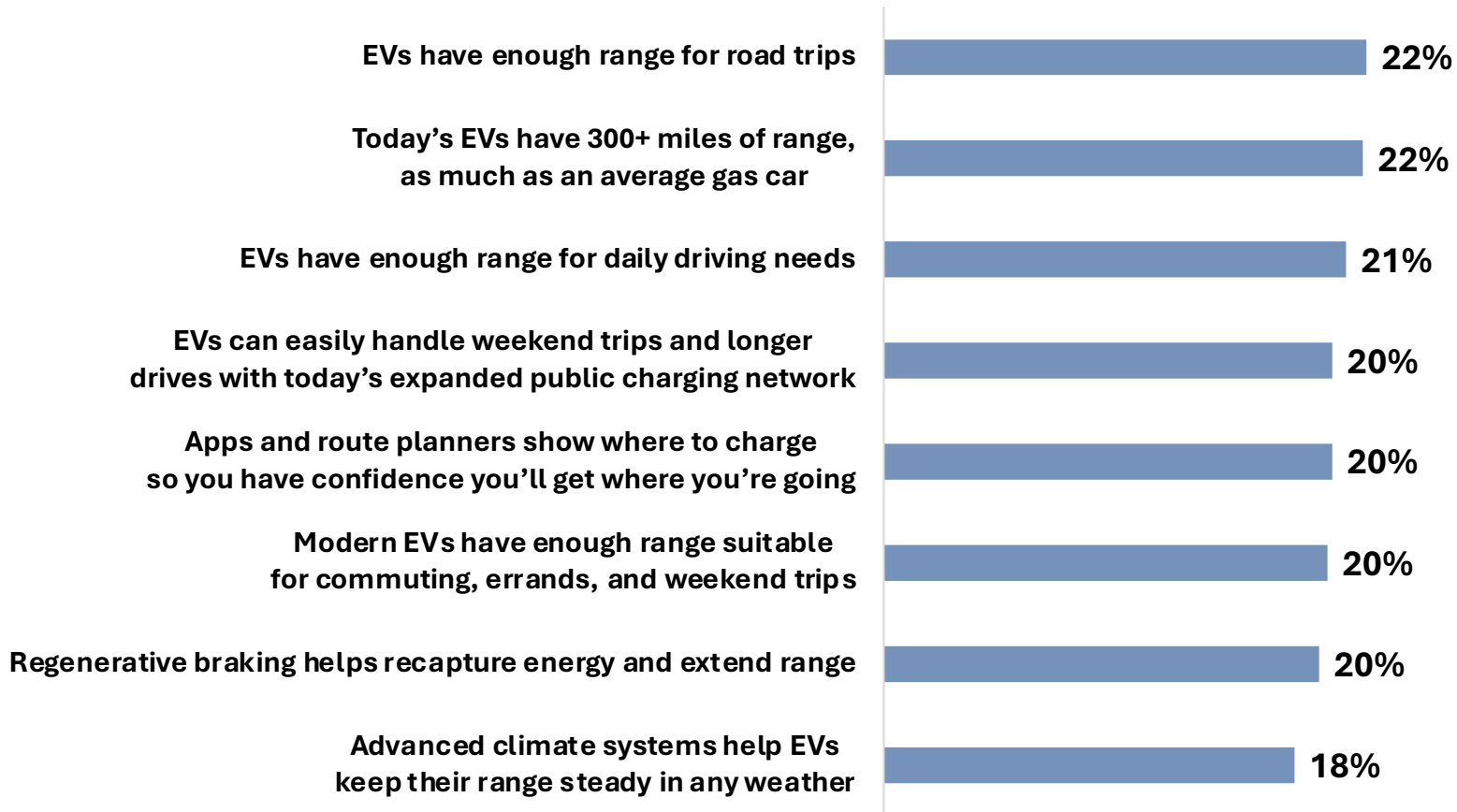
ACCESSIBILITY/LIFESTYLE MESSAGES SUMMARY RESULTS

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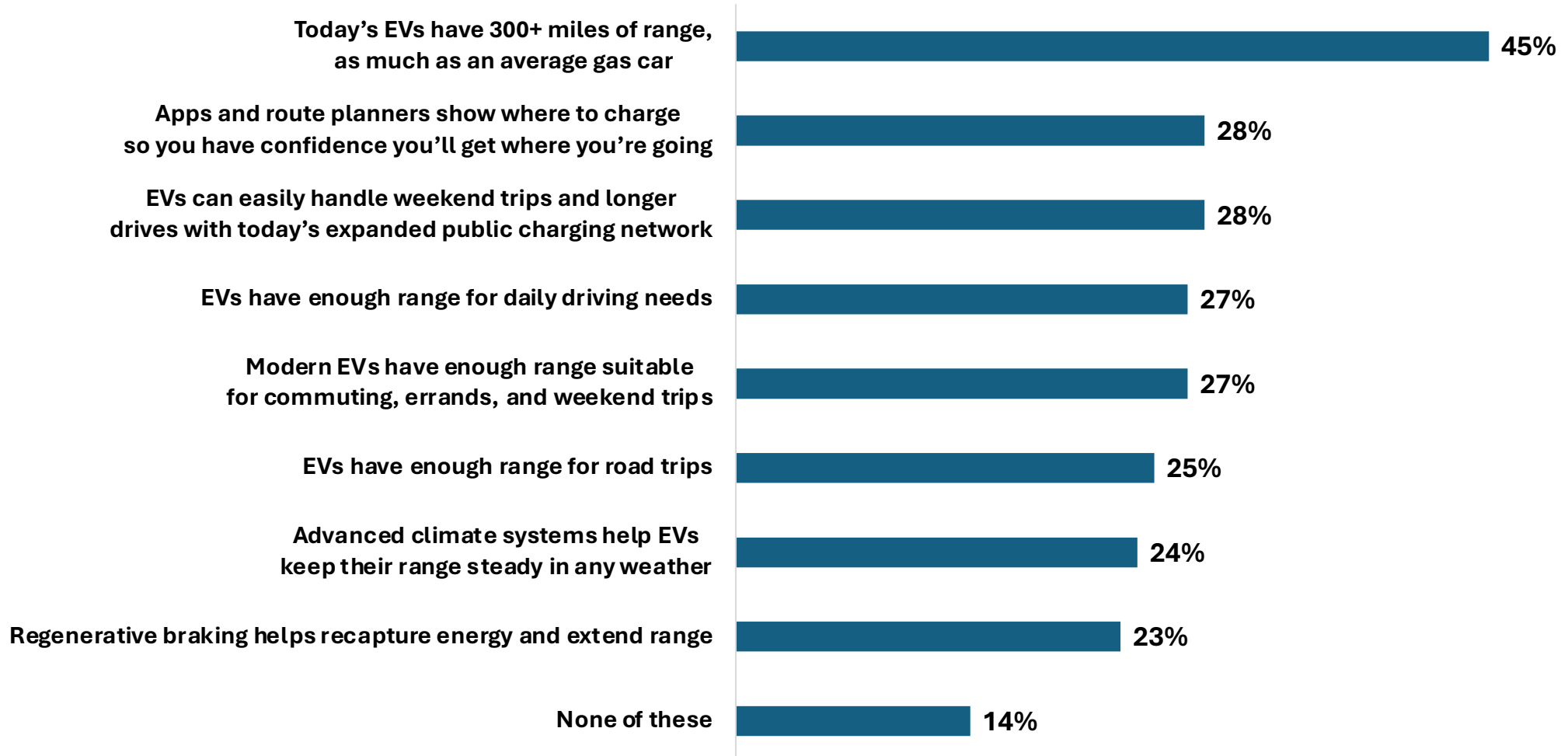
RANGE MESSAGES

On a scale of 1 to 5, how motivating are the following statements in encouraging you to choose an electric vehicle (EV) over a gas car? Percentage of respondents rating the messages extremely motivating are illustrated.



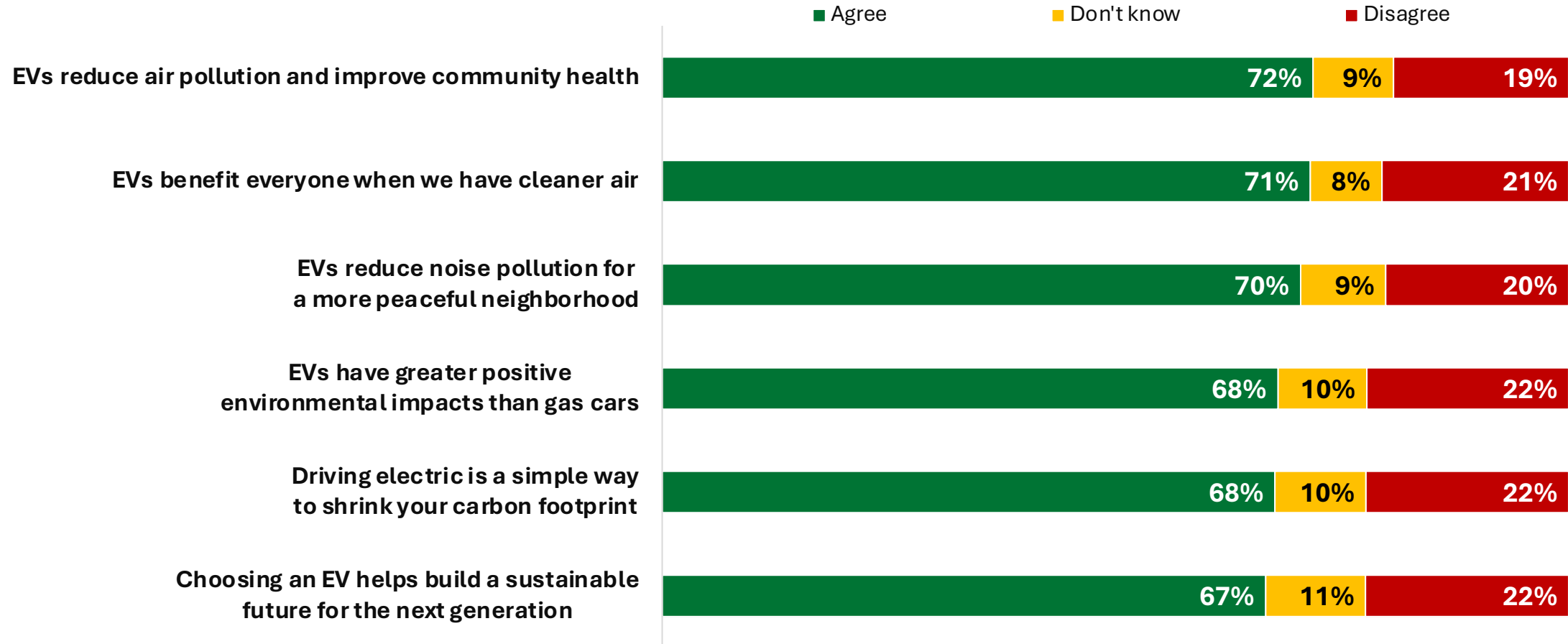
RANGE MESSAGES SUMMARY RESULTS

Which of the following statements do you find the most motivating? Select up to 3.



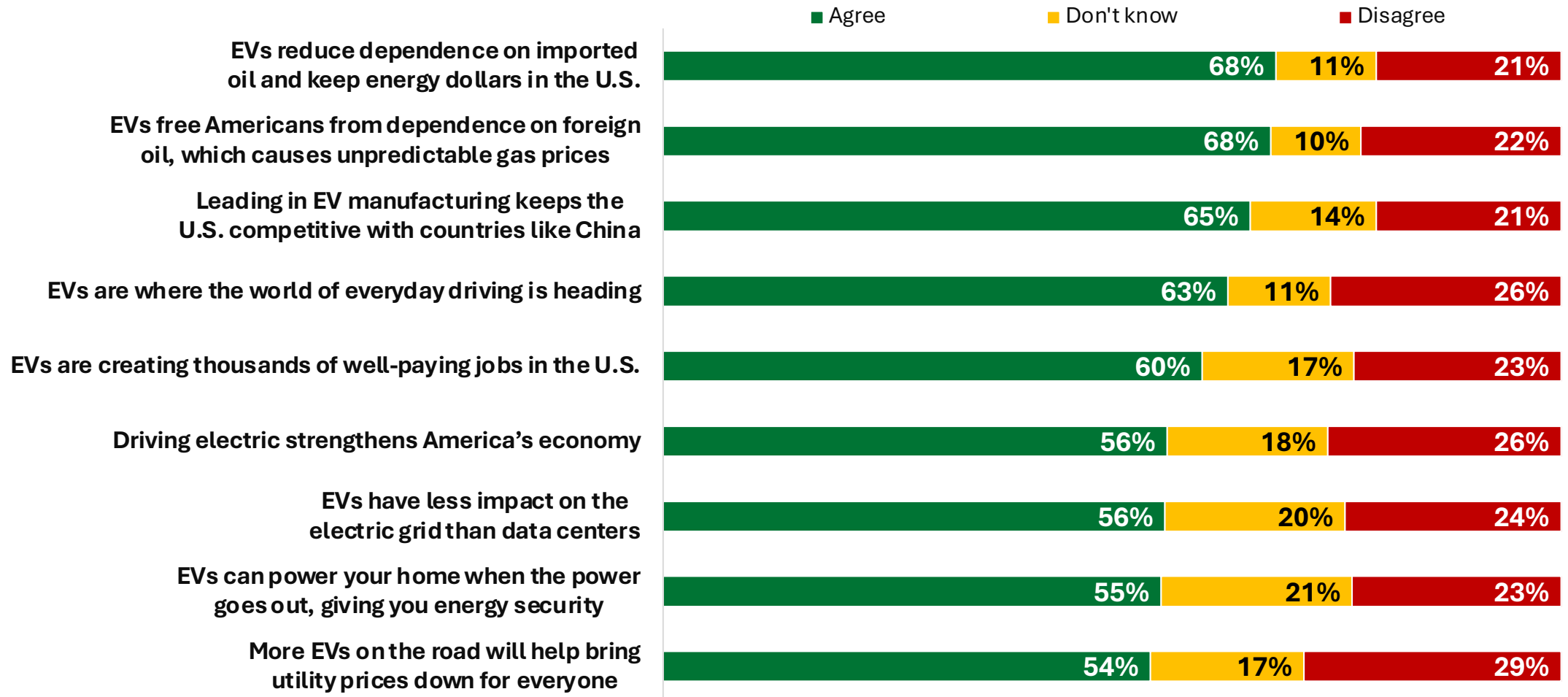
ENVIRONMENTAL IMPACT VALUES SUMMARY RESULTS

For each of the following statements, tell us whether you agree or disagree.



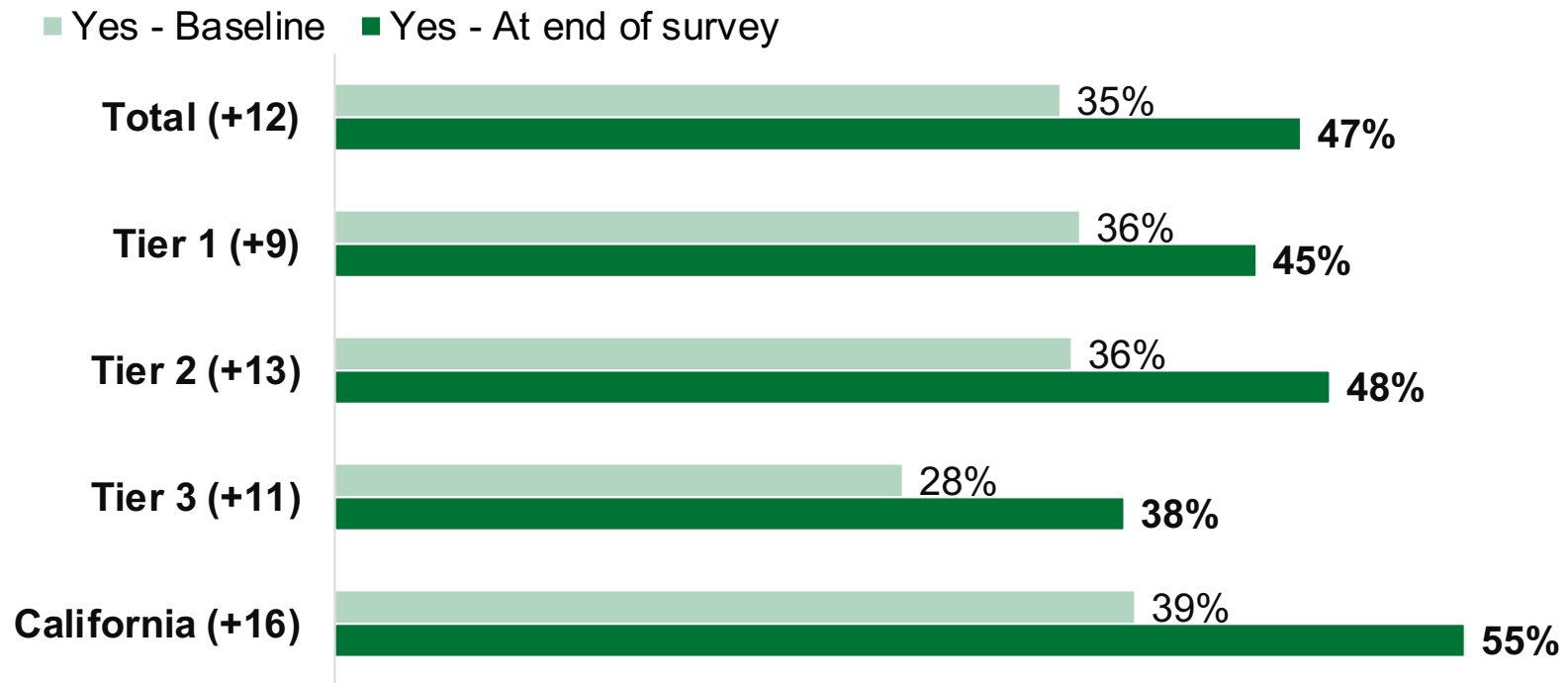
ENVIRONMENTAL IMPACT VALUES SUMMARY RESULTS

For each of the following statements, tell us whether you agree or disagree.

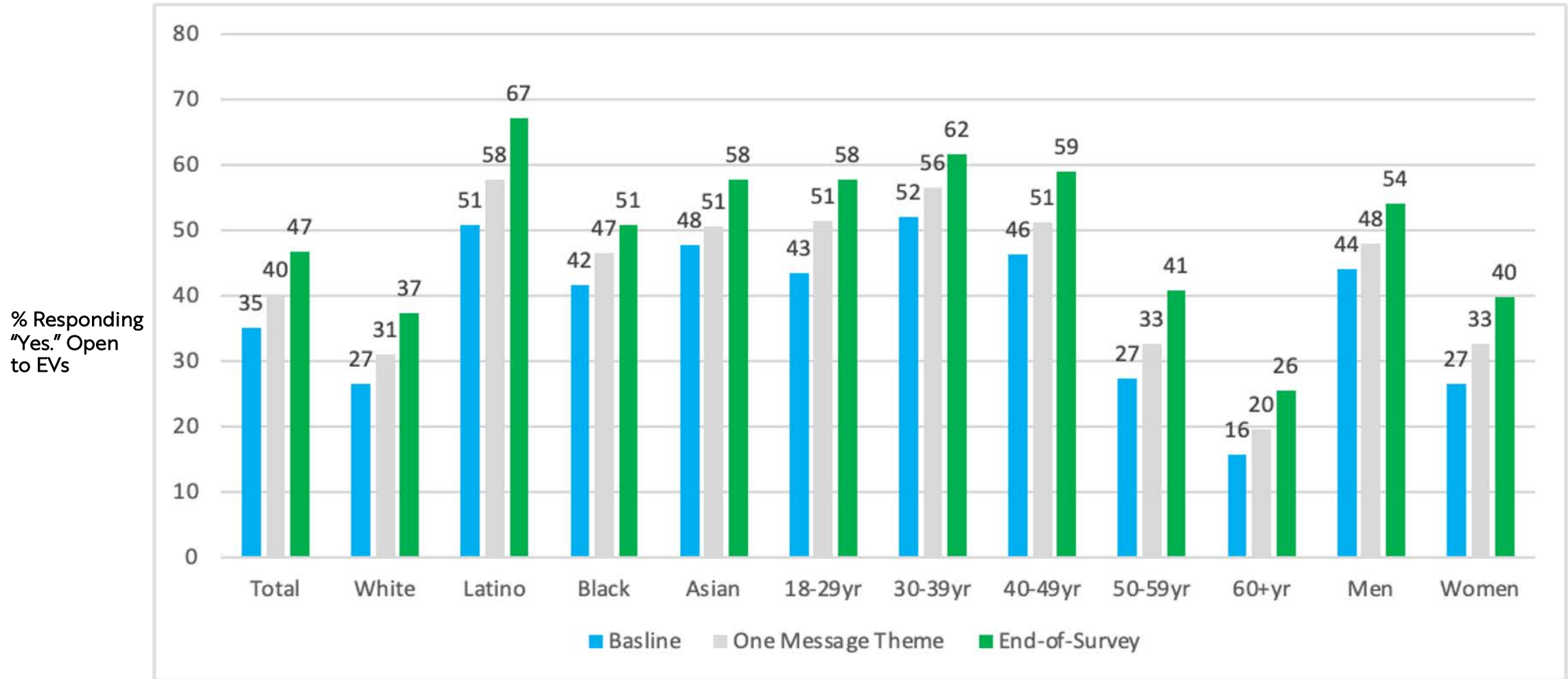


INTEREST IN PURCHASING AN ELECTRIC VEHICLE AFTER FULL SURVEY EXPOSURE – BY TIER (NET EFFECT OF ALL PERSUASION MESSAGES)

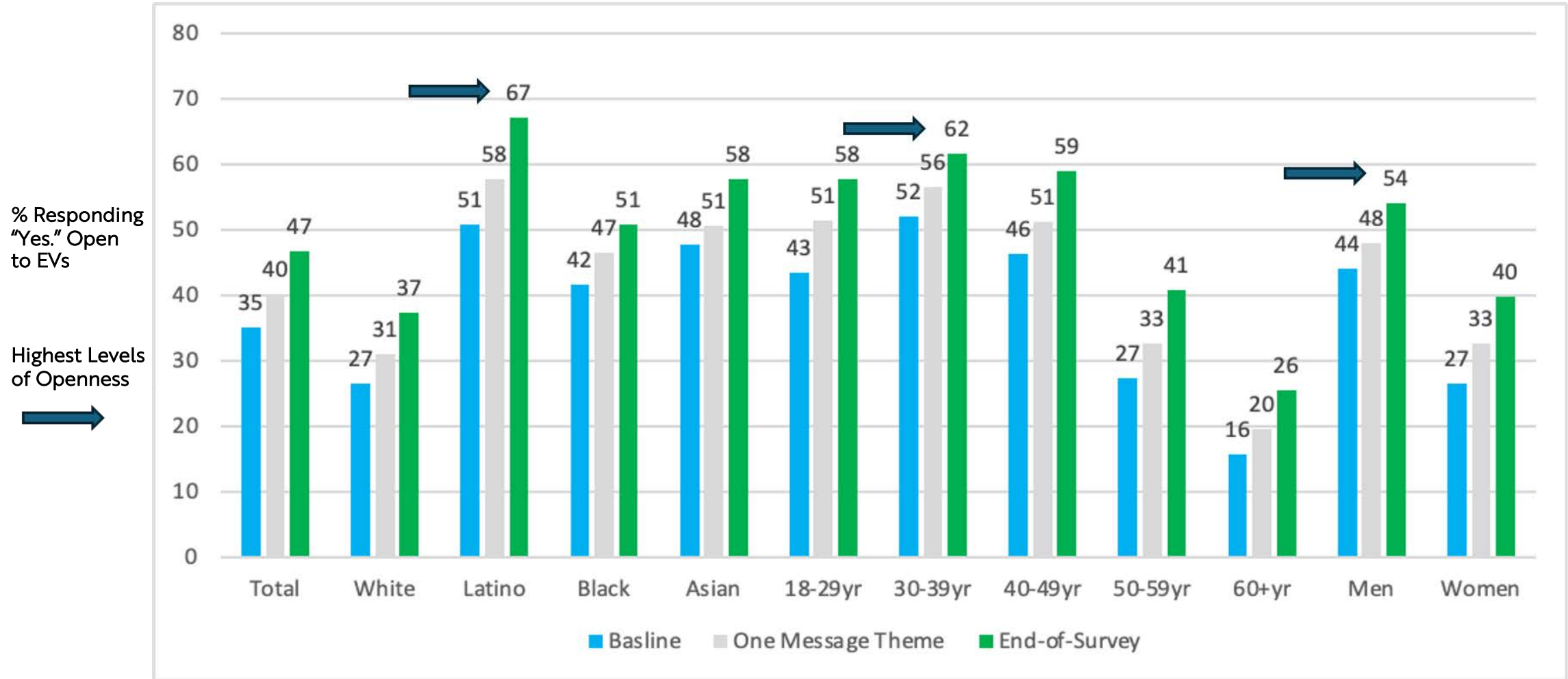
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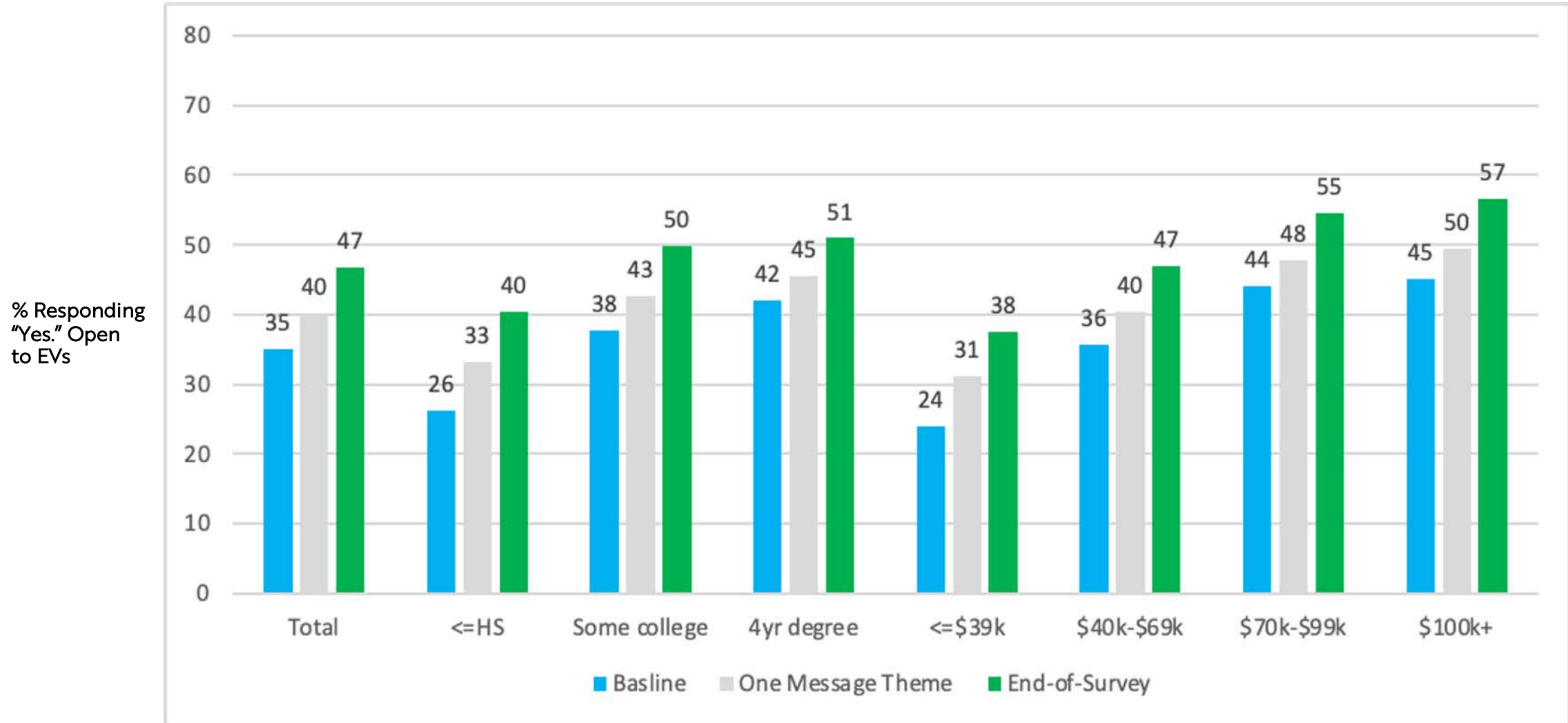
EFFECTS OF MESSAGING BY RACE, AGE AND GENDER



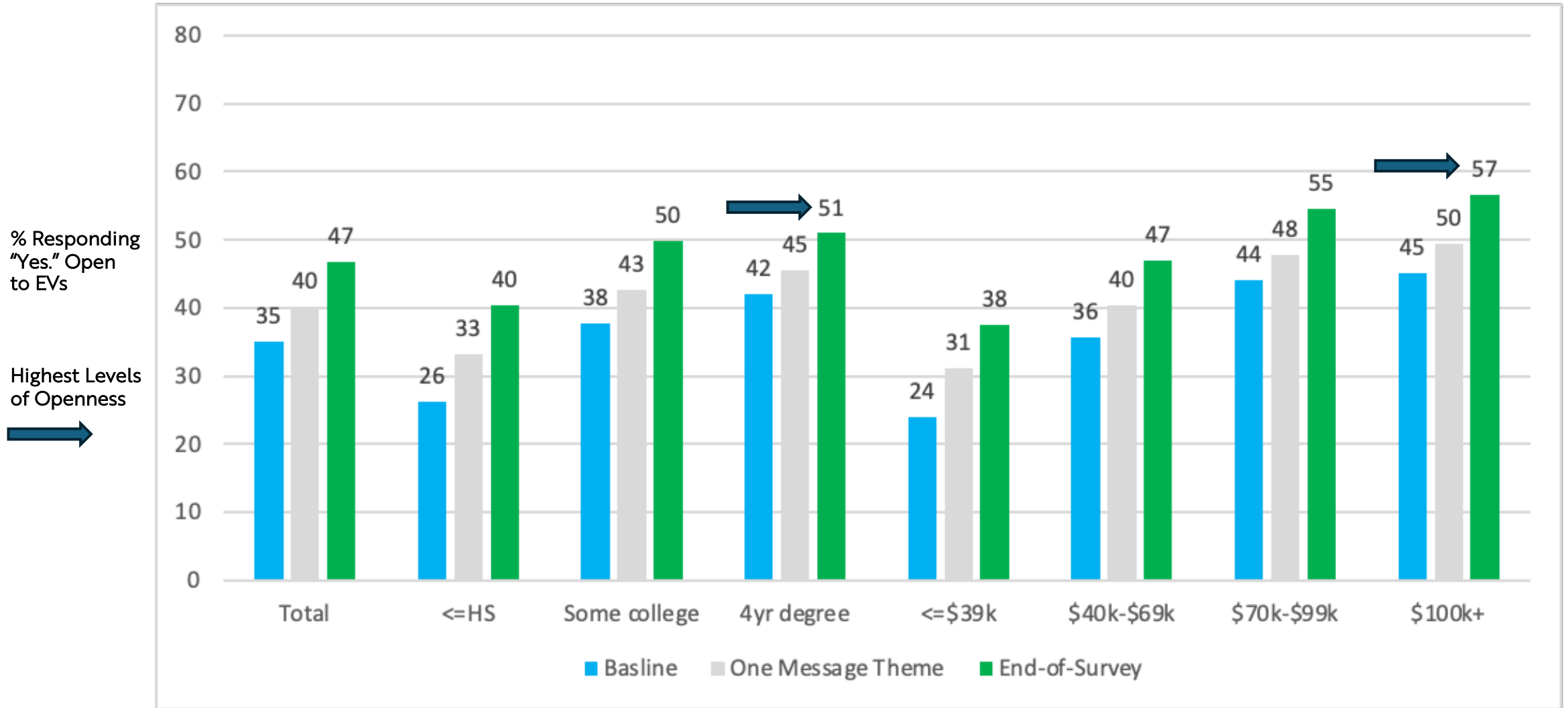
EFFECTS OF MESSAGING BY RACE, AGE AND GENDER



EFFECTS OF MESSAGING BY EDUCATION AND INCOME

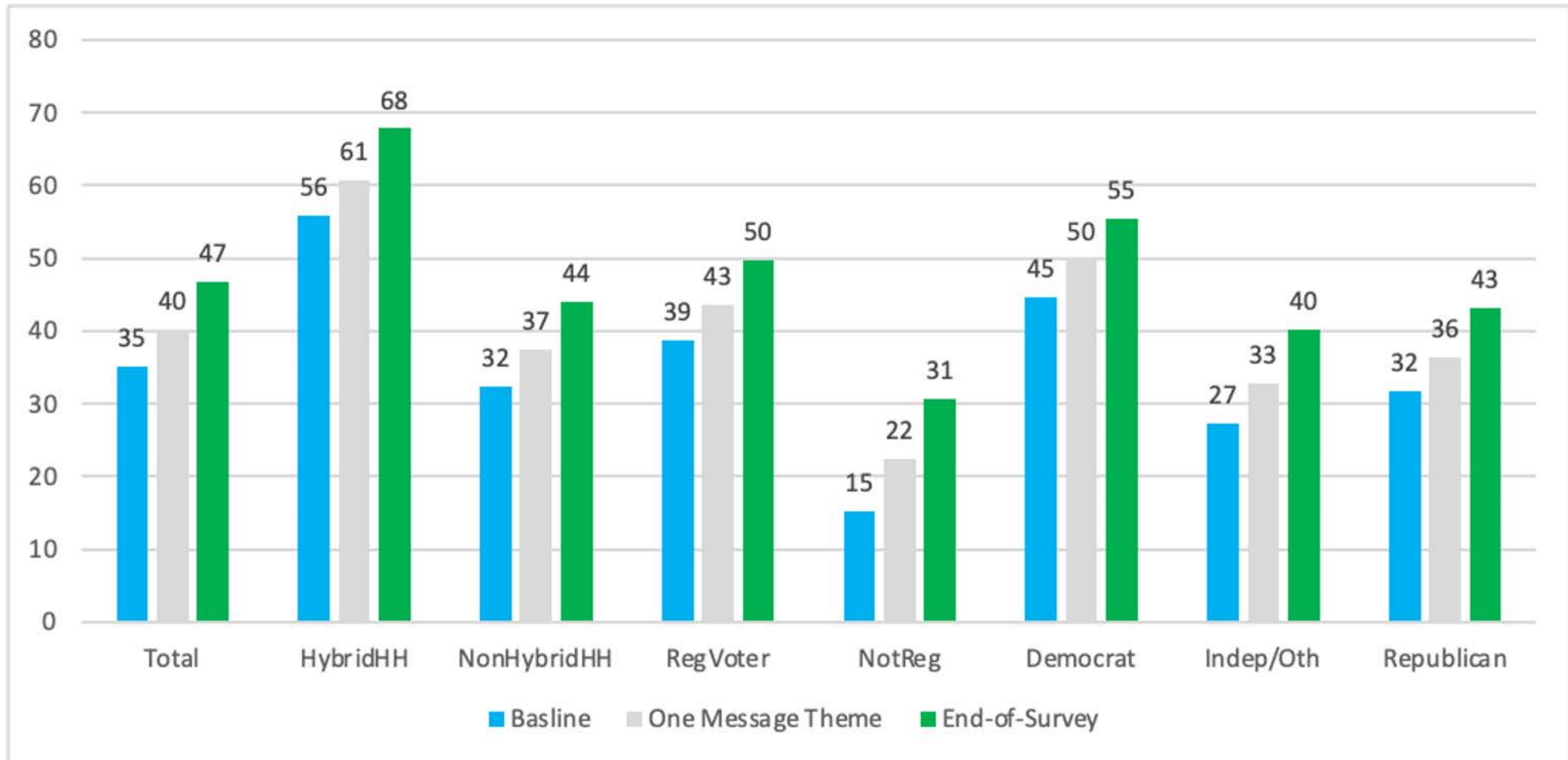


EFFECTS OF MESSAGING BY EDUCATION AND INCOME

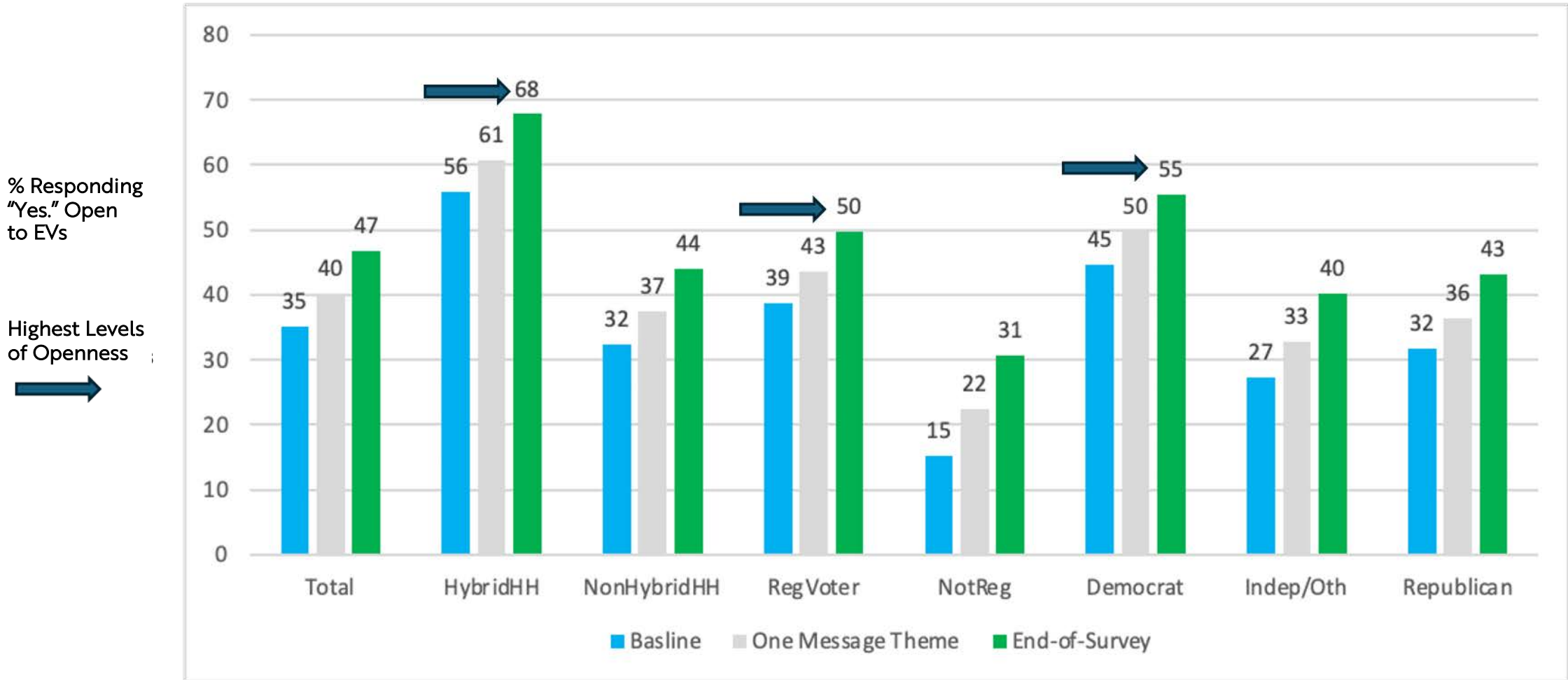


EFFECTS OF MESSAGING BY HYBRID OWNERSHIP AND POLITICAL VARIABLES

% Responding "Yes." Open to EVs



EFFECTS OF MESSAGING BY HYBRID OWNERSHIP AND POLITICAL VARIABLES



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RESEARCH SUMMARY

SUMMARY

- Overall, the messages tested were responded to favorably.
 - By far, cost-related messages appear to have had the greatest impact, increasing willingness to purchase EVs by nine points, though at least one or two messages from each theme (charging, lifestyle, and range) resonated effectively.
- Essentially everyone moved in the positive direction.
 - California and Tier 1 states moved more than Tier 2 and Tier 3 states.
 - Latino, Asian American and Black respondents at both the beginning (pre-message) and the end (post-message) of the survey were significantly more open to EV purchases than White respondents.
 - The messages have larger effects among cohorts who start the survey less likely to purchase EVs, while they have smaller effects among groups who were already enthusiastic about EVs.
 - Non-voters, younger respondents (18-29), and 40-49 year olds moved more.
 - Registered voters and those 30-39 were the ones who ended most positively, having started more supportive.

THANK YOU!