

NEW JERSEY

A SURVEY OF VOTERS

March 2023

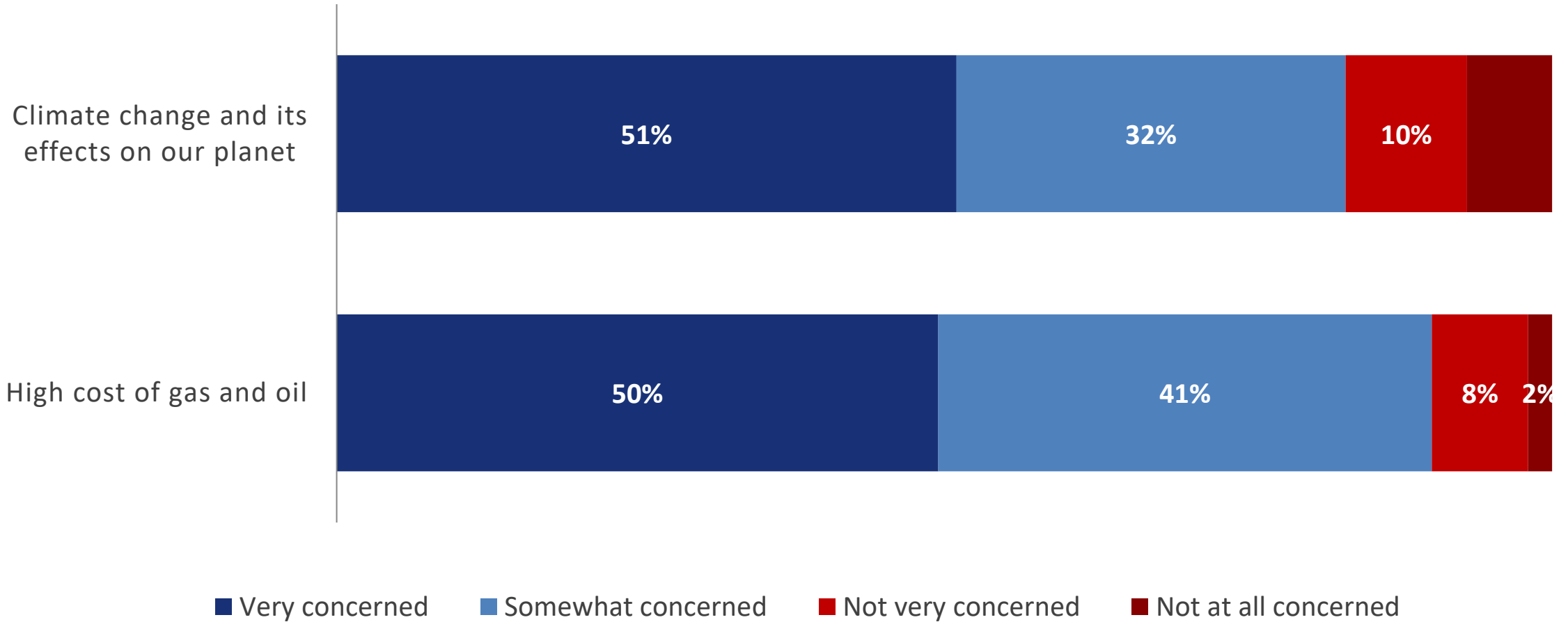
METHODOLOGY

- 600 interviews among voters in New Jersey were conducted from March 8-12, 2023.
- Interviews were conducted using an online survey.
- Results were weighted to ensure proportional response.
- The comparative margin of error for results is $\pm 4.0\%$ at the 95% confidence level. This number is higher for subgroups.

BREAKOUT DEFINITIONS

Category	Definition	Weighted n
TOTAL	All 600 respondents	600
Male	Respondents who identify as men	279
Female	Respondents who identify as women	315
Under 45	Respondents under the age of 45	262
45-64	Respondents age 45 to 64	193
65+	Respondents age 65 or older	145
North Jersey	Respondents who live in Bergen, Essex, Hudson, Morris, Passaic, Sussex, Union, or Warren county	277
Central Jersey	Respondents who live in Hunterdon, Mercer, Middlesex, Monmouth, Ocean, or Somerset county	196
South Jersey	Respondents who live in Atlantic, Burlington, Camden, Cape May, Cumberland, Gloucester, or Salem county	128
Non-college	Respondents without a four-year college degree	299
College	Respondents with a four-year college degree	300
Republican	Respondents who are a Strong Republican, Not-so-strong Republican, or Independent-lean Republican	174
Independent	Respondents who identify as Independent	145
Democrat	Respondents who are a Strong Democrat, Not-so-strong Democrat, or Independent-lean Democrat	265
Less than \$40k	Respondents whose household income is less than \$40,000 a year	154
\$40k-\$80k	Respondents whose household income is between \$40,000-\$80,000 a year	184
\$80k or more	Respondents whose household income is \$80,000 a year or more	231

ISSUE CONCERNS



BREAKOUT: ISSUE CONCERNS

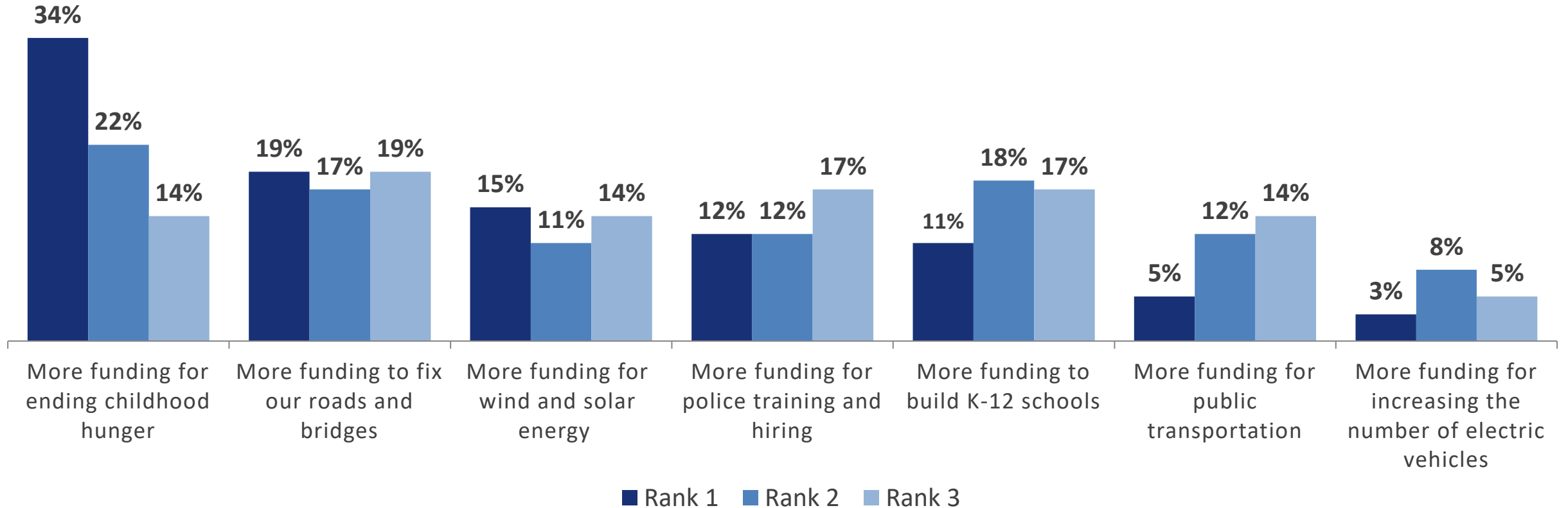
- Half of New Jersey voters are very concerned about the high cost of oil and gas. Middle aged voters, South Jersey voters, non-college voters, Republicans, and lower income voters are most likely to be very concerned.
- A majority of New Jersey voters are very concerned about climate change and its effects. Democrats are most likely to be very concerned.

	High cost of oil and gas	Climate change and its effects
TOTAL	50%	51%
Male	52%	48%
Female	48%	52%
Under 45	47%	54%
45-64	54%	44%
65+	48%	53%
North Jersey	48%	50%
Central Jersey	47%	49%
South Jersey	57%	53%
Non-college	51%	51%
College	48%	50%
Republican	66%	26%
Independent	48%	58%
Democrat	40%	63%
Less than \$40k	54%	55%
\$40k-\$80k	50%	50%
\$80k or more	47%	49%



Q8. In general, how concerned are you personally about the high cost of gas and oil, here in the United States?
 Q9. And how concerned are you personally about climate change and its effects on our planet
 % Very concerned

FEDERAL FUNDING PRIORITY

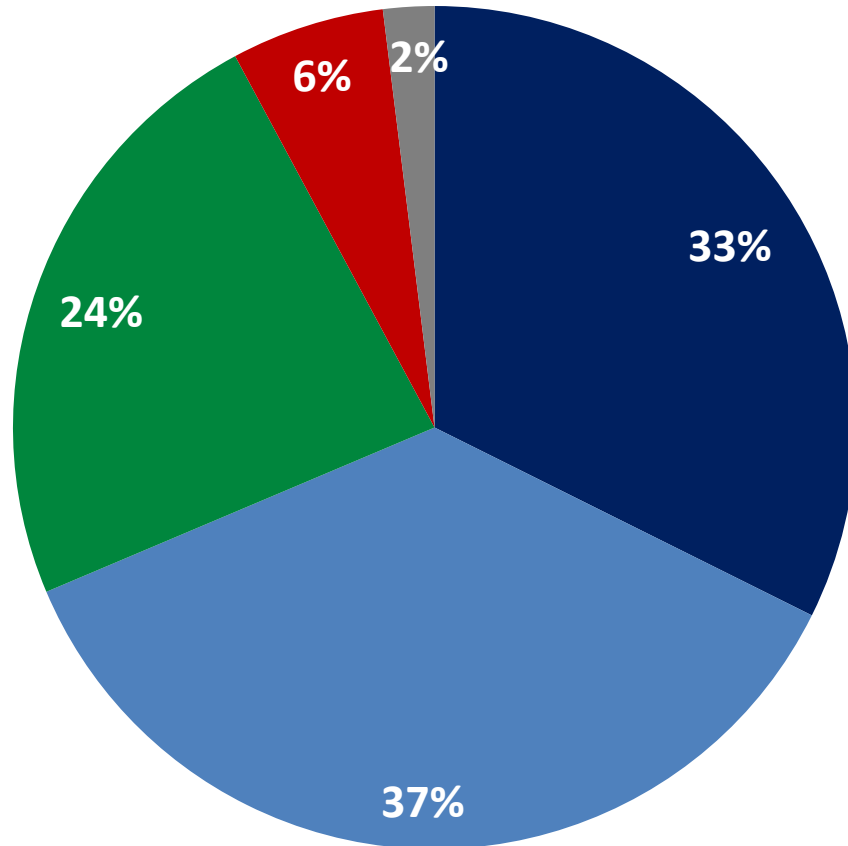


BREAKOUT: FEDERAL FUNDING PRIORITY RANK 1

- Over a third of New Jersey voters say that more funding for ending childhood hunger is most important, followed by funding to fix roads and bridges, and more funding for wind and solar energy.
- Just 3% of New Jersey voters say more funding for increasing the number of electric vehicles should be the top funding priority.

	More funding for ending childhood hunger	More funding to fix our roads and bridges	More funding for wind and solar energy	More funding for police training and hiring	More funding to build K-12 schools	More funding for public transportation	More funding for increasing the number of electric vehicles
TOTAL	34%	19%	15%	12%	11%	5%	3%
Male	27%	23%	17%	11%	12%	6%	5%
Female	40%	17%	14%	12%	10%	5%	2%
Under 45	38%	12%	15%	7%	16%	5%	6%
45-64	36%	24%	11%	13%	10%	5%	2%
65+	25%	27%	20%	19%	4%	5%	2%
North Jersey	36%	17%	16%	8%	12%	7%	4%
Central Jersey	28%	25%	17%	11%	12%	4%	2%
South Jersey	40%	17%	11%	20%	5%	3%	3%
Non-college	40%	16%	12%	13%	11%	6%	4%
College	28%	23%	19%	11%	11%	5%	3%
Republican	30%	22%	10%	21%	12%	2%	3%
Independent	39%	21%	14%	10%	8%	6%	2%
Democrat	35%	16%	20%	6%	11%	6%	5%
Less than \$40k	44%	11%	14%	10%	10%	6%	4%
\$40k-\$80k	34%	21%	11%	16%	8%	7%	3%
\$80k or more	30%	22%	21%	8%	11%	3%	4%

INCREASED ENERGY COSTS



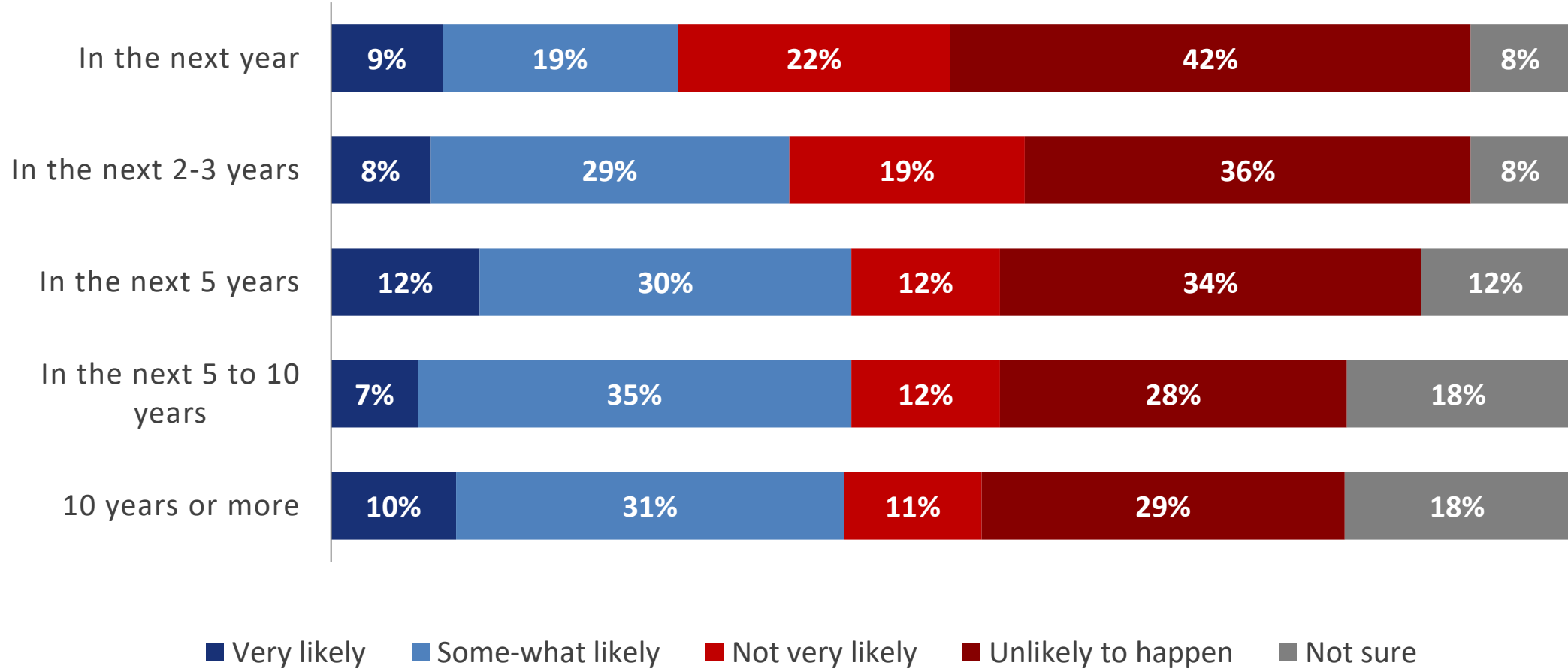
- It is making it hard to make ends meet
- It is not affecting my spending on needed items such as food but noticing the effect on my bank account
- I don't like it, but not really affecting me or my finances much
- Doesn't affect me at all
- Not sure

BREAKOUT: INCREASED ENERGY COSTS

- A third of New Jersey voters say increased energy costs is making it hard to make ends meet and another 37% say its not affecting their spending on need items but noticing the effect on bank account.
- Just 30% say it's not affecting them much or at all.
- Nearly half of lower income voters say it is making it hard to make ends meet.

	It is making it hard to make ends meet	It is not affecting my spending on needed items such as food but noticing the effect on my bank account	I don't like it, but not really affecting me or my finances much	Doesn't affect me at all	Not sure
TOTAL	33%	37%	24%	6%	2%
Male	31%	36%	25%	6%	2%
Female	34%	37%	22%	5%	1%
Under 45	36%	37%	20%	7%	1%
45-64	35%	34%	23%	5%	3%
65+	23%	40%	32%	5%	0%
North Jersey	29%	39%	23%	7%	3%
Central Jersey	26%	35%	31%	7%	1%
South Jersey	49%	34%	14%	3%	0%
Non-college	40%	33%	18%	7%	2%
College	25%	41%	29%	4%	1%
Republican	32%	41%	21%	5%	1%
Independent	34%	32%	22%	9%	3%
Democrat	31%	38%	26%	4%	1%
Less than \$40k	46%	29%	16%	5%	4%
\$40k-\$80k	38%	37%	18%	7%	1%
\$80k or more	21%	41%	33%	5%	0%

ELECTRIC VEHICLE



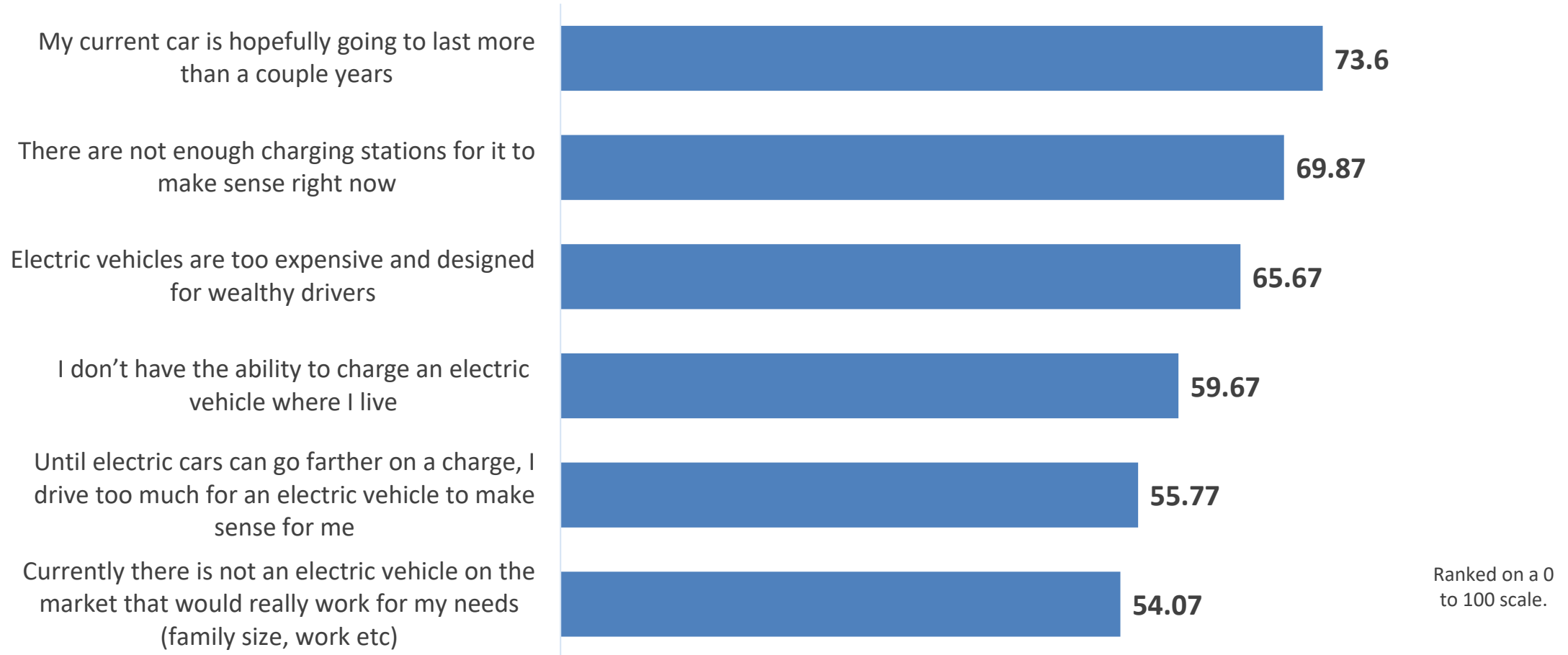
BREAKOUT: ELECTRIC VEHICLE

- Over a quarter of New Jersey voters say they are very or somewhat likely to buy an electric vehicle in the next year.
- Younger voters, men, and voters in North Jersey are most likely to say they are likely to buy an electric vehicle in the next year.

	In the next year	In the next 2-3 years	In the next 5 years	In the next 5-10 years	In the next 10 years or more
TOTAL	28%	37%	42%	42%	41%
Male	33%	46%	52%	49%	50%
Female	24%	28%	34%	36%	34%
Under 45	40%	46%	54%	54%	49%
45-64	28%	36%	38%	38%	45%
65+	7%	24%	30%	29%	26%
North Jersey	35%	43%	46%	42%	42%
Central Jersey	22%	29%	37%	43%	40%
South Jersey	23%	38%	41%	39%	42%
Non-college	23%	34%	38%	36%	33%
College	33%	40%	47%	49%	52%
Republican	21%	28%	29%	30%	31%
Independent	30%	46%	47%	41%	41%
Democrat	31%	39%	49%	51%	50%
Less than \$40k	21%	32%	35%	36%	36%
\$40k-\$80k	30%	36%	41%	41%	36%
\$80k or more	33%	44%	52%	49%	52%

Q12. In general, how likely are you to buy an electric vehicle in the following time periods? (Only asked if not very likely in previous time period)
% Total Likely

REASONS FOR NOT BUYING AN ELECTRIC VEHICLE



BREAKOUT: NOT BUYING AN ELECTRIC VEHICLE

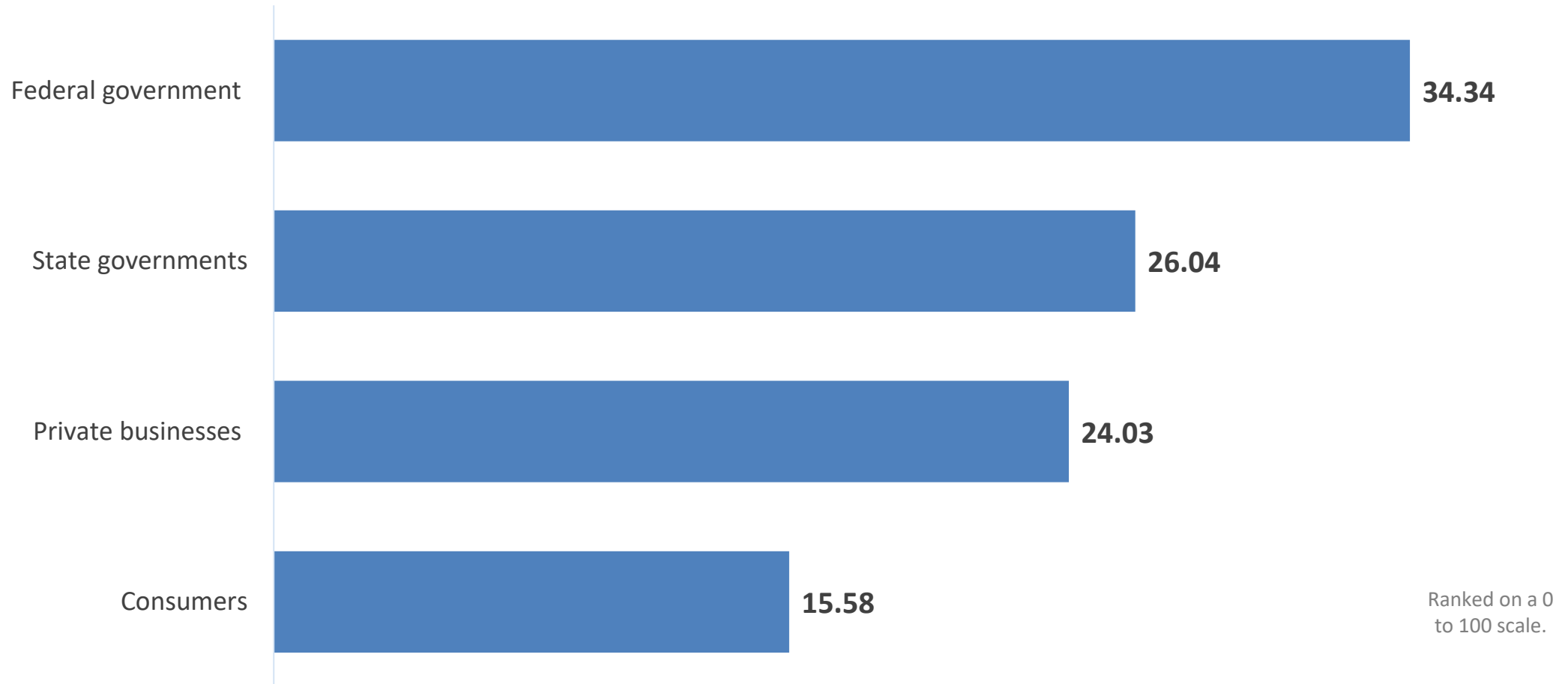
- Nearly half of New Jersey voters who are not very likely to buy an electric car in the next two years say their current care should last longer.
- Two in five also strongly agree that there aren't enough charging stations.

	Current car should last longer	Too expensive	Not enough charging stations	Can't charge where I live	Drive too much for it to make sense	No EV on market that meets needs
TOTAL	47%	37%	42%	34%	26%	24%
Male	45%	31%	40%	24%	24%	19%
Female	49%	41%	44%	43%	27%	29%
Under 45	35%	34%	33%	29%	17%	22%
45-64	49%	34%	41%	35%	32%	24%
65+	62%	44%	56%	41%	30%	27%
North Jersey	39%	37%	39%	34%	27%	25%
Central Jersey	54%	38%	41%	29%	26%	22%
South Jersey	53%	34%	47%	41%	22%	26%
Non-college	45%	37%	44%	37%	28%	25%
College	50%	36%	39%	31%	23%	22%
Republican	60%	46%	48%	38%	38%	30%
Independent	46%	34%	49%	33%	21%	28%
Democrat	40%	33%	33%	33%	19%	19%
Less than \$40k	35%	42%	39%	38%	22%	20%
\$40k-\$80k	50%	40%	47%	41%	30%	26%
\$80k or more	51%	32%	39%	26%	26%	25%

Q13. [SHOW IF 2 YEARS OR MORE] Below are some reasons that other people have given for why they don't think they will buy an electric vehicle in the next couple years. Please rate each using a scale of 0-100 where 0 means you do not agree at all and 100 means you strongly agree. You can use any number between 0 and 100.

% Strongly Agree (80-100)

CHARGING STATION FUNDING



BREAKOUT: CHARGING STATION FUNDING

- Over a quarter of New Jersey voters think the federal government should provide at least half of the infrastructure for charging stations.

	Federal government	State government	Private business	Consumers
TOTAL	27%	13%	12%	4%
Male	27%	12%	13%	3%
Female	28%	14%	11%	5%
Under 45	21%	10%	9%	5%
45-64	31%	17%	12%	4%
65+	33%	11%	17%	4%
North Jersey	24%	13%	9%	2%
Central Jersey	29%	12%	17%	6%
South Jersey	29%	12%	11%	6%
Non-college	28%	11%	9%	5%
College	26%	14%	15%	3%
Republican	29%	11%	15%	4%
Independent	26%	18%	13%	5%
Democrat	27%	12%	8%	4%
Less than \$40k	27%	11%	7%	5%
\$40k-\$80k	26%	12%	13%	8%
\$80k or more	25%	14%	14%	2%

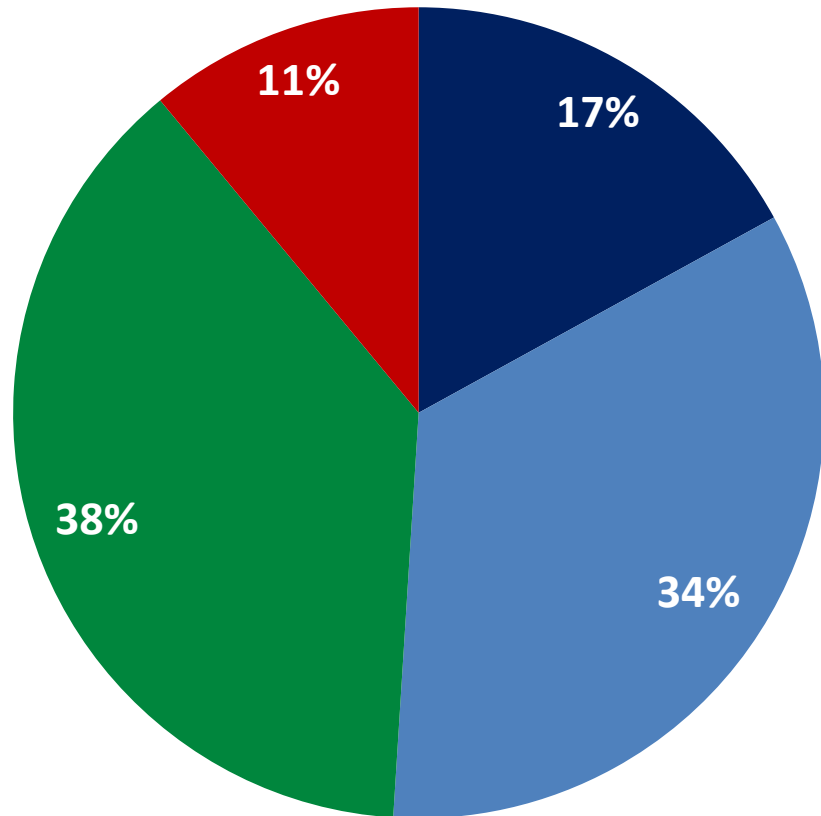
Q16. When it comes to building out the infrastructure of charging stations in New Jersey what percent of the funding do you think should come from the federal government, state government, private businesses, or electricity users/consumers. Please make sure your answer adds up to 100%
% 50-100%

BREAKOUT: CHARGING STATION FUNDING

- Thirty-five percent of New Jersey voters say most of the funding for charging stations should come from the federal government.
- Nineteen percent say it should mostly be private businesses and 15% say mostly state government.

	Mostly federal government	Mostly state government	Mostly private businesses	Mostly consumers	Mostly federal and state government	Mostly federal government and private businesses	All evenly	Other
TOTAL	35%	15%	19%	9%	8%	2%	7%	5%
Male	35%	15%	21%	9%	7%	2%	4%	5%
Female	35%	14%	16%	8%	9%	2%	10%	6%
Under 45	32%	19%	14%	10%	5%	4%	10%	6%
45-64	33%	14%	23%	7%	11%	0%	6%	7%
65+	41%	10%	22%	7%	11%	2%	4%	3%
North Jersey	35%	18%	17%	7%	7%	2%	9%	6%
Central Jersey	37%	12%	21%	10%	9%	2%	3%	6%
South Jersey	30%	14%	19%	11%	8%	3%	12%	3%
Non-college	34%	16%	14%	9%	8%	3%	9%	6%
College	35%	14%	23%	7%	8%	2%	6%	5%
Republican	36%	14%	23%	10%	7%	0%	8%	2%
Independent	30%	18%	23%	5%	11%	2%	6%	5%
Democrat	38%	14%	13%	9%	7%	3%	8%	7%
Less than \$40k	33%	16%	15%	12%	9%	3%	9%	4%
\$40k-\$80k	32%	16%	18%	10%	7%	4%	7%	7%
\$80k or more	35%	15%	21%	6%	9%	1%	6%	6%

MOVING TO ELECTRIC VEHICLES



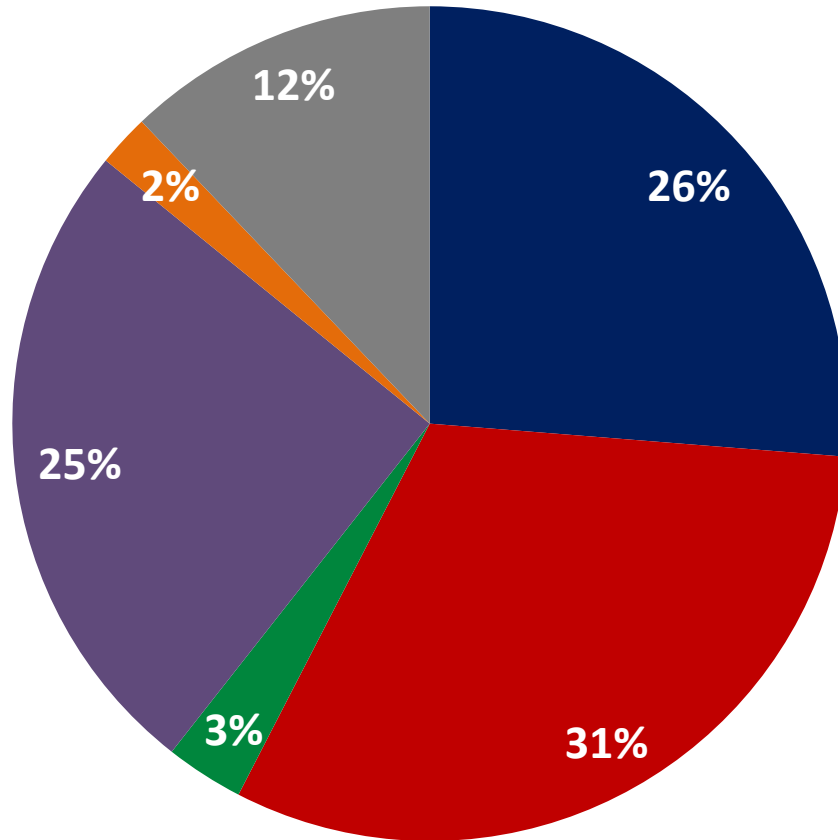
- We need to do whatever we can to get as many electric vehicles on the road as quickly as possible in New Jersey, including the state subsidizing the costs of the cars, banning the sale of new gas and diesel vehicles, and building the infrastructure for charging stations.
- The movement towards electric vehicles is already happening and while it might be slower than many would like we should not impose EV mandates or ban the sale of gas and diesel cars and trucks in New Jersey.
- Government spending should focus on priorities like schools, healthcare and public safety, not building EV chargers.
- Electric vehicles will probably not ever be a big market in New Jersey, and we need to focus on other things.

BREAKOUT: MOVING TO ELECTRIC VEHICLES

- Thirty-eight percent of New Jersey voters say government spending should focus on other priorities like schools. Women, non-college voters, Republicans, and lower income voters are most likely to say this.
- A third of voters say the movement is already happening.
- Just 17% say we need to do whatever we can to get as many EVs on the road as quickly as possible.

	We need to do whatever we can to get as many electric vehicles on the road as quickly as possible	The movement towards electric vehicles is already happening	Government spending should focus on priorities like schools, healthcare and public safety, not building EV chargers.	Electric vehicles will probably not ever be a big market in New Jersey, and we need to focus on other things.
TOTAL	17%	34%	38%	11%
Male	20%	40%	31%	9%
Female	13%	30%	43%	14%
Under 45	20%	31%	36%	13%
45-64	13%	37%	39%	12%
65+	15%	38%	38%	9%
North Jersey	17%	35%	39%	9%
Central Jersey	18%	32%	39%	11%
South Jersey	13%	36%	33%	17%
Non-college	12%	30%	43%	15%
College	21%	39%	32%	7%
Republican	10%	34%	42%	14%
Independent	18%	35%	36%	12%
Democrat	21%	35%	35%	10%
Less than \$40k	17%	25%	42%	16%
\$40k-\$80k	13%	36%	37%	14%
\$80k or more	20%	40%	33%	6%

ENCOURAGE MORE EVS



- Subsidize the cost of buying a new electric vehicle for residents
- Provide state funding to ensure that there are more charging stations available statewide.
- Ban the sale of new gas and diesel vehicles in New Jersey
- Let the new vehicle market reflect consumer demand
- Other
- Not sure

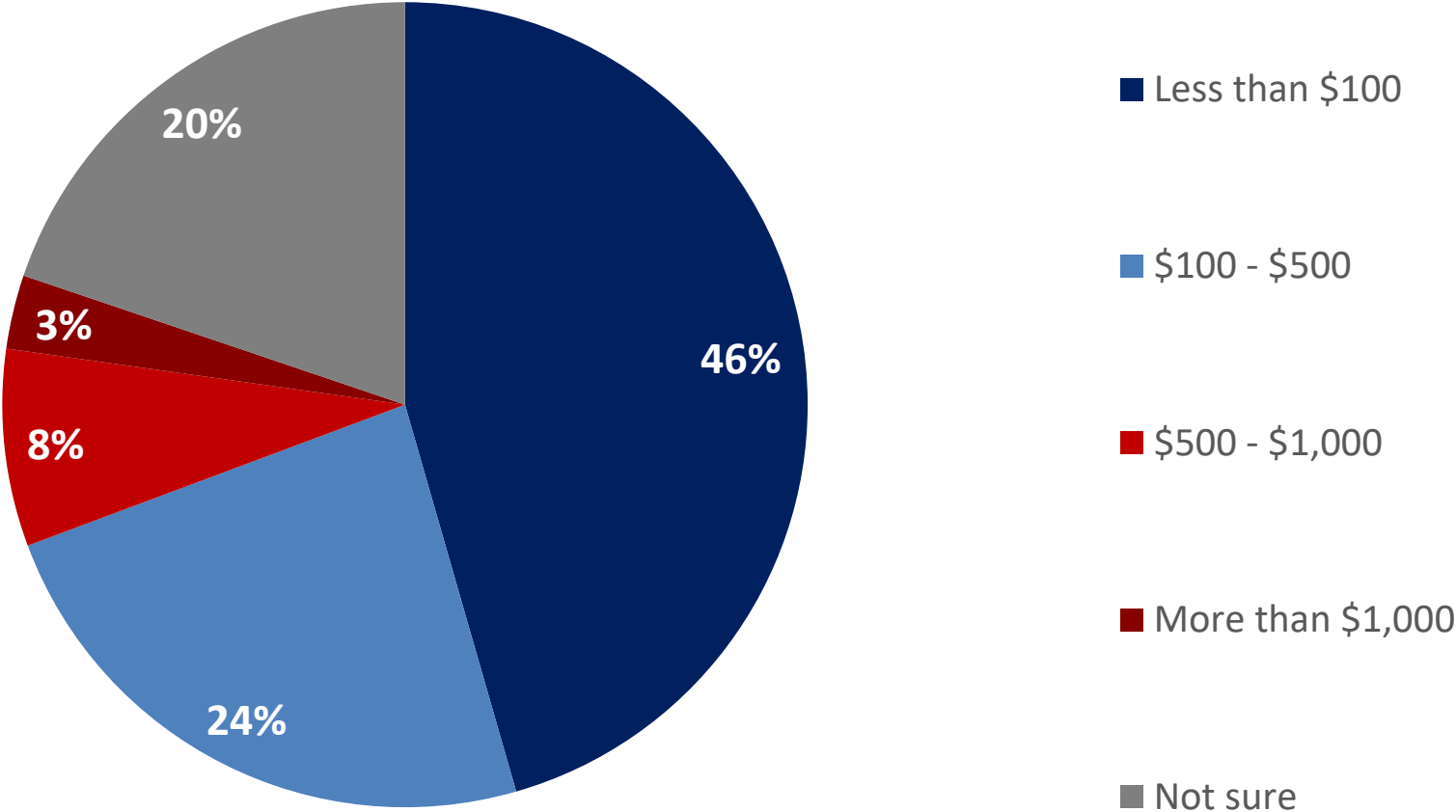
BREAKOUT: ENCOURAGE MORE EVS

- To encourage more EVs, three in ten voters think New Jersey should provide state funding to ensure that there are more charging stations available around the state.
- A quarter support subsidizing the cost of buying a new EV and another quarter say let the new vehicle market reflect consumer demand.
- Just 3% say limiting the number of gas vehicles sold in the state is the best approach.

	Subsidize the cost of buying a new electric vehicle for residents	Provide state funding to ensure that there are more charging stations available around the state.	Ban the sale of new gas and diesel vehicles in New Jersey	Let the new vehicle market reflect consumer demand	Other	Not sure
TOTAL	26%	31%	3%	25%	2%	12%
Male	28%	31%	3%	28%	1%	9%
Female	24%	32%	4%	23%	2%	16%
Under 45	32%	31%	6%	17%	1%	12%
45-64	21%	32%	1%	30%	2%	14%
65+	22%	31%	1%	32%	1%	12%
North Jersey	23%	33%	4%	26%	1%	13%
Central Jersey	30%	30%	1%	27%	2%	10%
South Jersey	29%	30%	5%	20%	1%	15%
Non-college	21%	32%	3%	24%	2%	19%
College	31%	31%	4%	26%	1%	6%
Republican	25%	23%	3%	36%	3%	10%
Independent	25%	35%	0%	24%	0%	16%
Democrat	28%	35%	6%	18%	2%	12%
Less than \$40k	23%	33%	3%	22%	2%	17%
\$40k-\$80k	25%	31%	6%	28%	1%	8%
\$80k or more	30%	29%	2%	25%	2%	11%

Q15. Regardless of your views on electric vehicles, which of the following approaches would be the best for the New Jersey government to take to encourage more residents to buy electric vehicles?

WILLING TO PAY MORE FOR EV ADOPTION



BREAKOUT: WILLING TO PAY MORE FOR EV ADOPTION

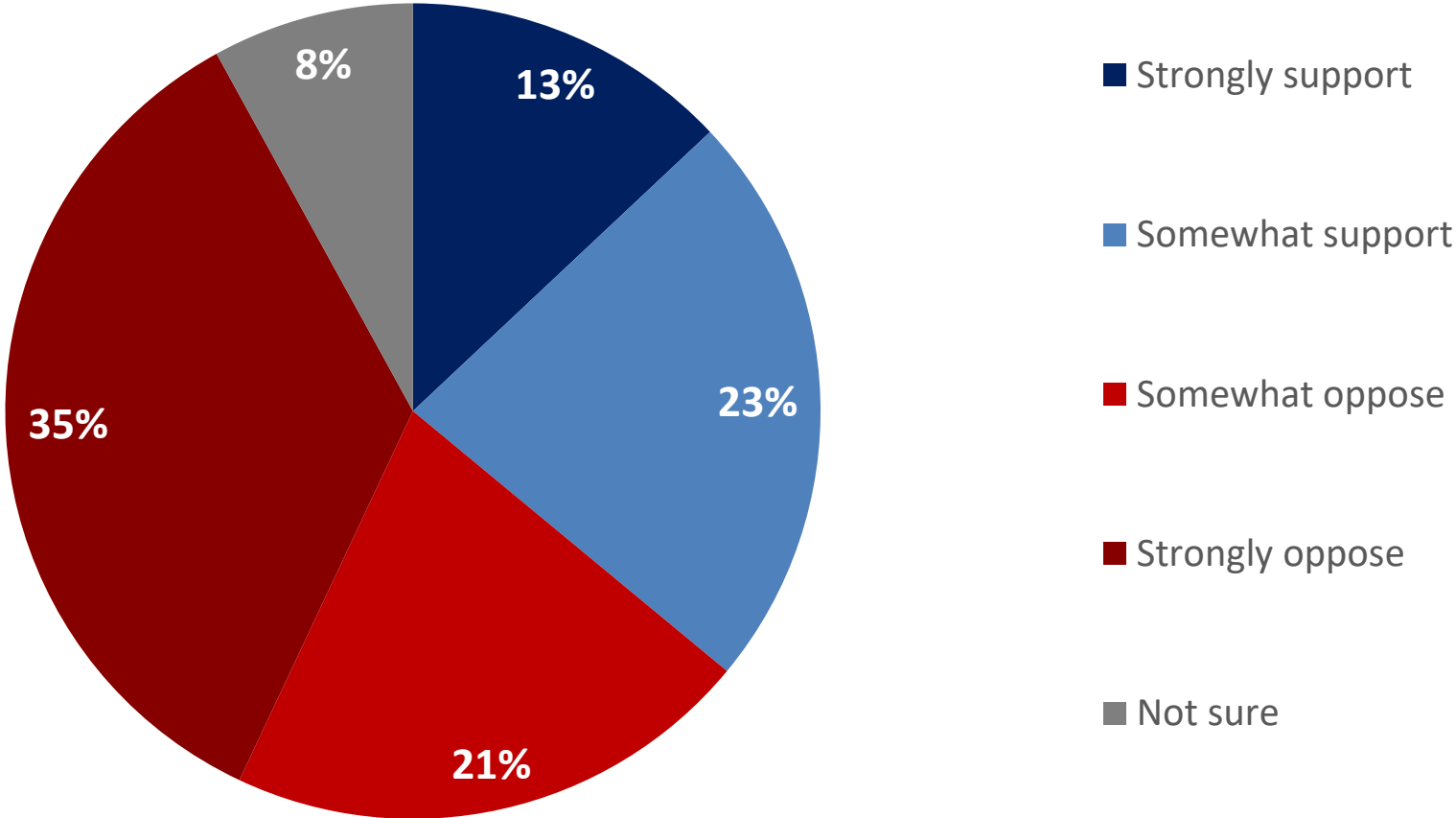
- Nearly half of New Jersey voters are willing to pay less than \$100 a year to speed up the adoption of electric vehicles. Women, older voters, Central Jersey voters, non-college voters, and Republicans are most likely to say they would pay less than \$100.
- A quarter are willing to pay between \$100-\$500.

	Less than \$100	\$100 - \$500	\$500 - \$1,000	More than \$1,000	Not sure
TOTAL	46%	24%	8%	3%	20%
Male	41%	30%	10%	5%	14%
Female	51%	18%	6%	1%	24%
Under 45	35%	31%	13%	5%	16%
45-64	51%	21%	5%	1%	23%
65+	62%	14%	2%	0%	22%
North Jersey	40%	28%	11%	3%	19%
Central Jersey	54%	19%	4%	4%	19%
South Jersey	46%	22%	7%	1%	24%
Non-college	50%	18%	7%	1%	24%
College	42%	29%	9%	4%	16%
Republican	61%	14%	8%	2%	15%
Independent	45%	24%	6%	2%	23%
Democrat	38%	30%	9%	3%	20%
Less than \$40k	46%	21%	4%	1%	27%
\$40k-\$80k	50%	23%	6%	2%	19%
\$80k or more	41%	29%	12%	5%	14%

Q17. How much more would you be willing to spend personally every year to speed up the adoption of electric vehicles and electric vehicle charging throughout New Jersey?

RESTRICT GAS VEHICLE SALES

BANS TO END SALE OF GAS VEHICLES



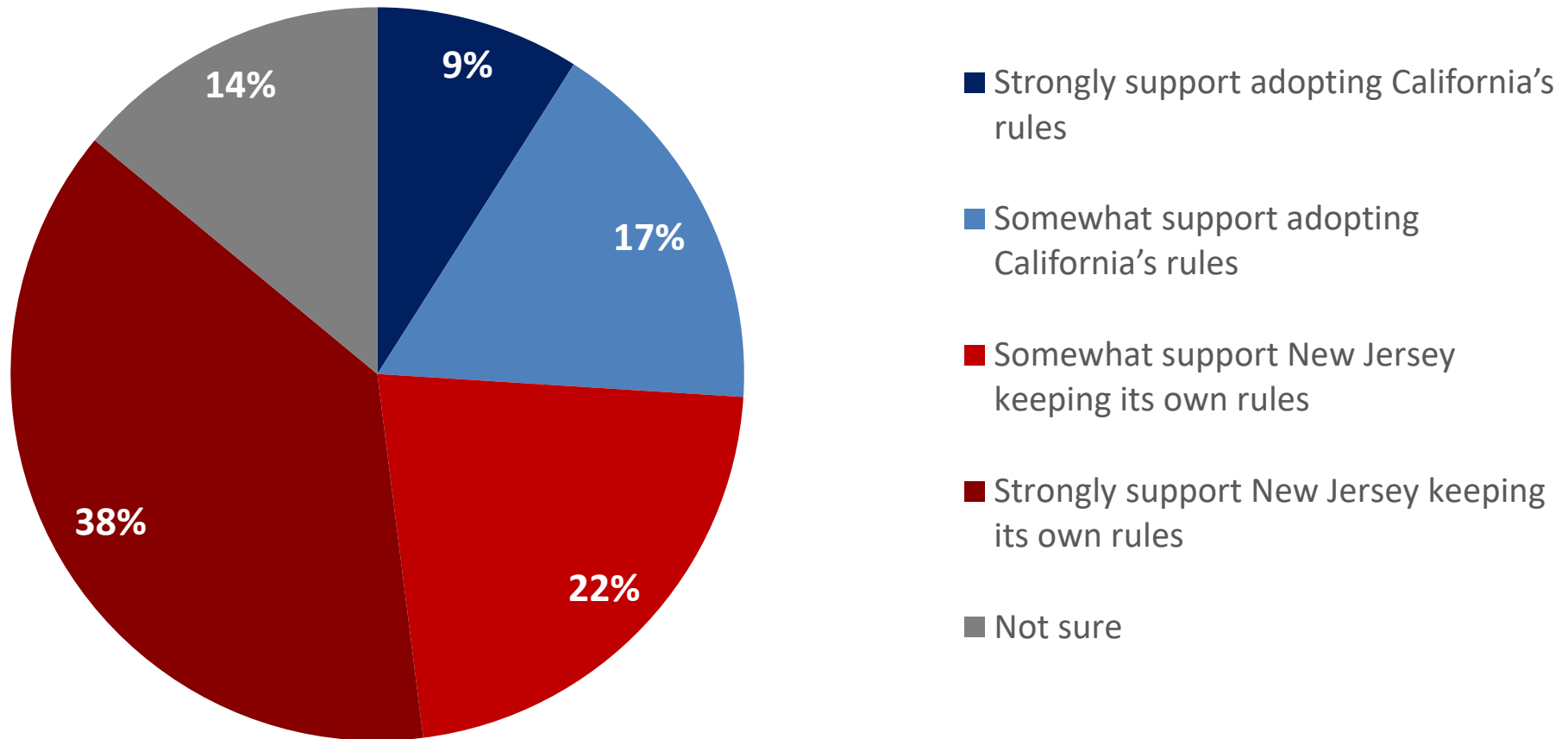
Q18. As you may have heard in the news recently, New Jersey Governor Phil Murphy announced that the state is going to ban the sale of new gasoline and diesel vehicles in full by 2035. Based on what you know about this issue, would you say you support or oppose a state government ban to end the sale of gas-powered cars and trucks?

BREAKOUT: BANS TO END SALE OF GAS VEHICLES

- A majority of voters oppose bans of the sale of gas-powered vehicles, just 35% support these plans.
- Women, older voters, Central and South Jersey voters, and Republican voters are most likely to oppose the ban.

	Total support	Total oppose	Not sure
TOTAL	35%	56%	8%
Male	40%	53%	7%
Female	31%	60%	9%
Under 45	48%	44%	7%
45-64	27%	62%	11%
65+	23%	70%	7%
North Jersey	40%	50%	10%
Central Jersey	32%	62%	6%
South Jersey	31%	62%	7%
Non-college	32%	58%	9%
College	39%	54%	7%
Republican	18%	80%	2%
Independent	33%	54%	12%
Democrat	49%	42%	9%
Less than \$40k	37%	53%	10%
\$40k-\$80k	34%	58%	8%
\$80k or more	38%	55%	6%

ADOPT CA'S REGS OR WRITE OWN RULES

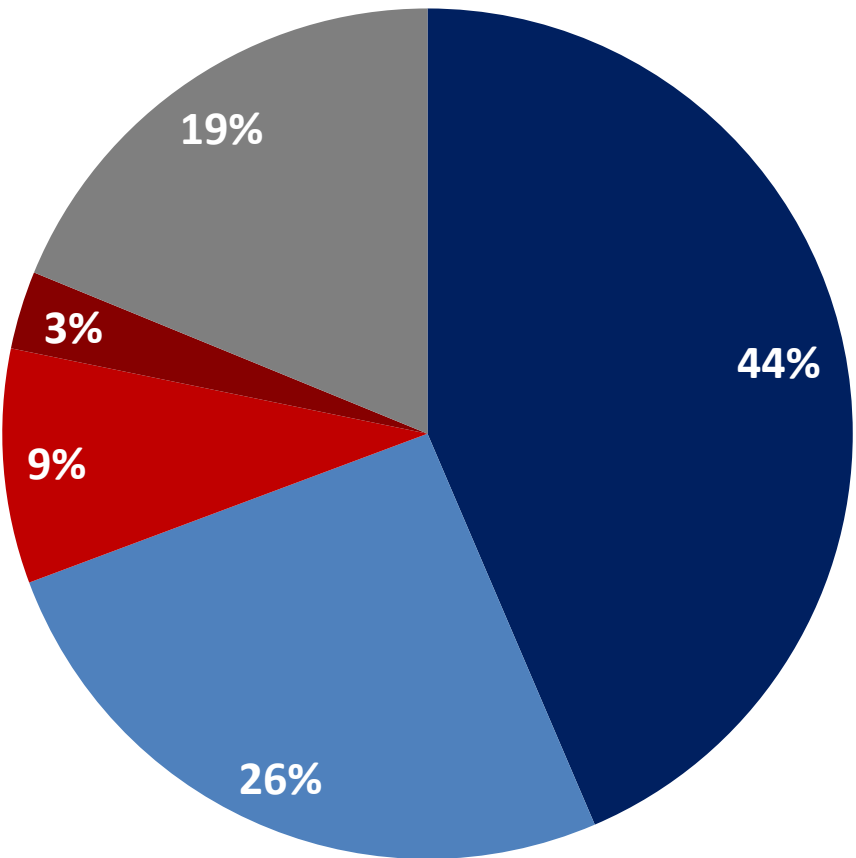


BREAKOUT: CA'S REGS OR WRITE OWN RULES

- Three in five New Jersey voters support the state writing its own rules, just a quarter support adopting California's rules.

	Total support adopting CA rules	Total support writing own rules	Not sure
TOTAL	26%	60%	14%
Male	31%	58%	11%
Female	22%	61%	17%
Under 45	36%	52%	12%
45-64	18%	65%	16%
65+	19%	66%	15%
North Jersey	27%	58%	15%
Central Jersey	27%	57%	16%
South Jersey	25%	65%	10%
Non-college	20%	62%	17%
College	33%	57%	11%
Republican	13%	80%	7%
Independent	20%	60%	21%
Democrat	40%	46%	15%
Less than \$40k	25%	58%	17%
\$40k-\$80k	27%	62%	11%
\$80k or more	29%	57%	14%

REQUIRING STATE LEGISLATURE APPROVAL



- Strongly support the governor getting approval from the state legislature
- Somewhat support the governor getting approval from the state legislature
- Somewhat support the governor moving unilaterally even without approval from the legislature
- Strongly support the governor proceeding with a ban even if he doesn't have the support of the legislature
- Not sure

Q20. And regardless of whether or not you feel New Jersey should maintain its own rules or adopt California's rules, do you feel the Governor should be required to get approval from the New Jersey legislature on new regulations to implement a ban on the sale of new gasoline and diesel vehicles or do you feel the Governor should move forward on his own?

BREAKOUT: REQUIRING STATE LEGISLATURE APPROVAL

- Over two-thirds of New Jersey voters support the Governor getting approval from the state legislature.
- Just 12% of voters support the Governor moving unilaterally.

	Total support governor getting approval from the state legislature	Total support governor moving unilaterally	Not sure
TOTAL	69%	12%	19%
Male	75%	12%	14%
Female	65%	12%	23%
Under 45	68%	14%	18%
45-64	67%	11%	22%
65+	75%	9%	16%
North Jersey	66%	15%	19%
Central Jersey	73%	9%	19%
South Jersey	71%	11%	18%
Non-college	64%	12%	25%
College	75%	12%	13%
Republican	76%	8%	16%
Independent	67%	12%	20%
Democrat	67%	15%	18%
Less than \$40k	57%	20%	23%
\$40k-\$80k	76%	9%	15%
\$80k or more	74%	10%	16%

MESSAGING

Regardless of how much you support the move to electric vehicles, New Jersey should have its own rules and regulations and not be forced to follow the rules of California.



While our free-market system is not perfect, government mandates or controls on what people can or can't buy never work out well. Encouraging EVs through tax credits, helping build out the infrastructure needed, etc. all...



New Jersey lawmakers should seek a bipartisan solution to help ensure a smooth adoption of EVs, and not get caught up in taking extreme positions on either side of the EV issue.



More people in New Jersey driving EVs is good for the environment but passing a complete ban on selling gas and diesel vehicles is a step too far for New Jersey.



A full ban on EV sales in New Jersey could have a negative effect on the movement to EVs since it will likely alienate many consumers who don't feel the government should control what people can and cannot drive in New...



A ban on gas and diesel vehicle sales would only mean that New Jersey residents would cross state lines to buy a gas car to get around the regulations.



Many of the major car companies say they are trying to move to a full electric fleet within the next 10 years. There is no good reason for New Jersey to mandate EV sales or ban the sale of other cars when the marketplace is...



Ranked on a 0 to 10 scale.

BREAKOUT: MESSAGING

- A majority of voters say that New Jersey should write its own rules and 45% strongly agree that government mandates never work well, that legislators should seek a bipartisan solution, and that a complete ban is a step too far. Older voters and Republicans are most likely to strongly agree with each.
- Over two in five strongly agree that a ban will alienate many consumers and that residents will cross state lines to buy cars.

	NJ should write own rules	Govt mandates never work well	Should seek bipartisan solution	Complete ban is a step too far	Will alienate many consumers	Cross state lines to buy cars	Marketplace is heading that way
TOTAL	54%	45%	45%	47%	41%	41%	36%
Male	50%	44%	47%	45%	39%	38%	38%
Female	57%	46%	44%	50%	44%	43%	35%
Under 45	43%	31%	35%	35%	35%	31%	27%
45-64	57%	49%	46%	51%	42%	45%	41%
65+	68%	63%	61%	64%	51%	53%	47%
North Jersey	49%	40%	43%	42%	39%	38%	35%
Central Jersey	58%	49%	44%	54%	44%	44%	38%
South Jersey	58%	49%	49%	48%	43%	41%	35%
Non-college	54%	45%	42%	50%	43%	41%	36%
College	54%	44%	47%	45%	39%	40%	37%
Republican	68%	62%	52%	61%	53%	54%	46%
Independent	57%	38%	42%	49%	43%	38%	35%
Democrat	44%	37%	43%	38%	34%	34%	32%
Less than \$40k	47%	37%	40%	43%	42%	37%	33%
\$40k-\$80k	59%	44%	43%	48%	43%	48%	41%
\$80k or more	51%	47%	50%	46%	38%	39%	37%



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