

MARYLAND

A SURVEY OF VOTERS

April 2023

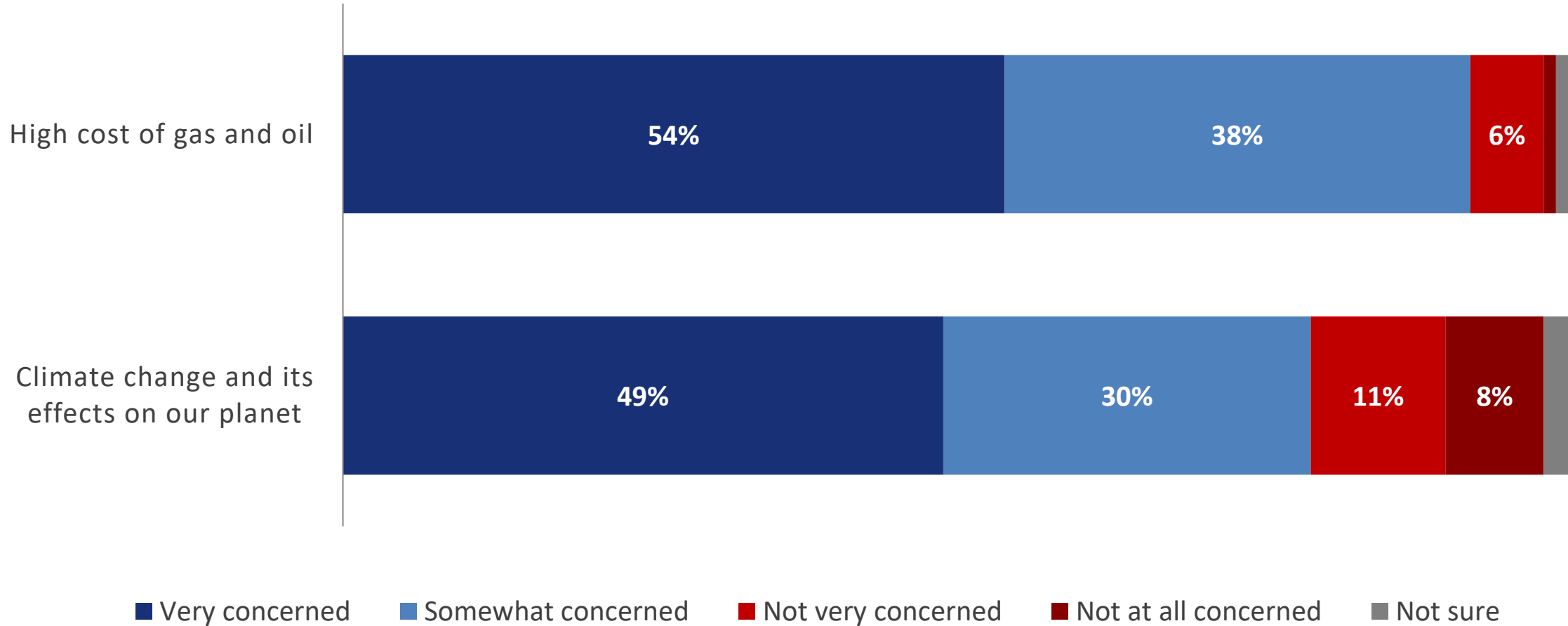
METHODOLOGY

- 600 interviews among voters in Maryland were conducted from April 12-17, 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	320
Under 45	Respondents under the age of 45	232
45-64	Respondents age 45 to 64	212
65+	Respondents age 65 or older	157
Baltimore mm	Respondents who live in the Baltimore or Salisbury media market	324
DC mm	Respondents who live in the Washington DC or Pittsburgh media market	276
Non-college	Respondents without a four-year college degree	305
College	Respondents with a four-year college degree	294
Republican	Respondents who are a Strong Republican or Not-so-strong Republican	130
Independent	Respondents who identify as Independent, Independent-lean Democrat, or Independent-lean Republican	193
Democrat	Respondents who are a Strong Democrat, or Not-so-strong Democrat	263
Less than \$40k	Respondents whose household income is less than \$40,000 a year	170
\$40k-\$80k	Respondents whose household income is between \$40,000-\$80,000 a year	188
\$80k or more	Respondents whose household income is \$80,000 a year or more	208

ISSUE CONCERNS

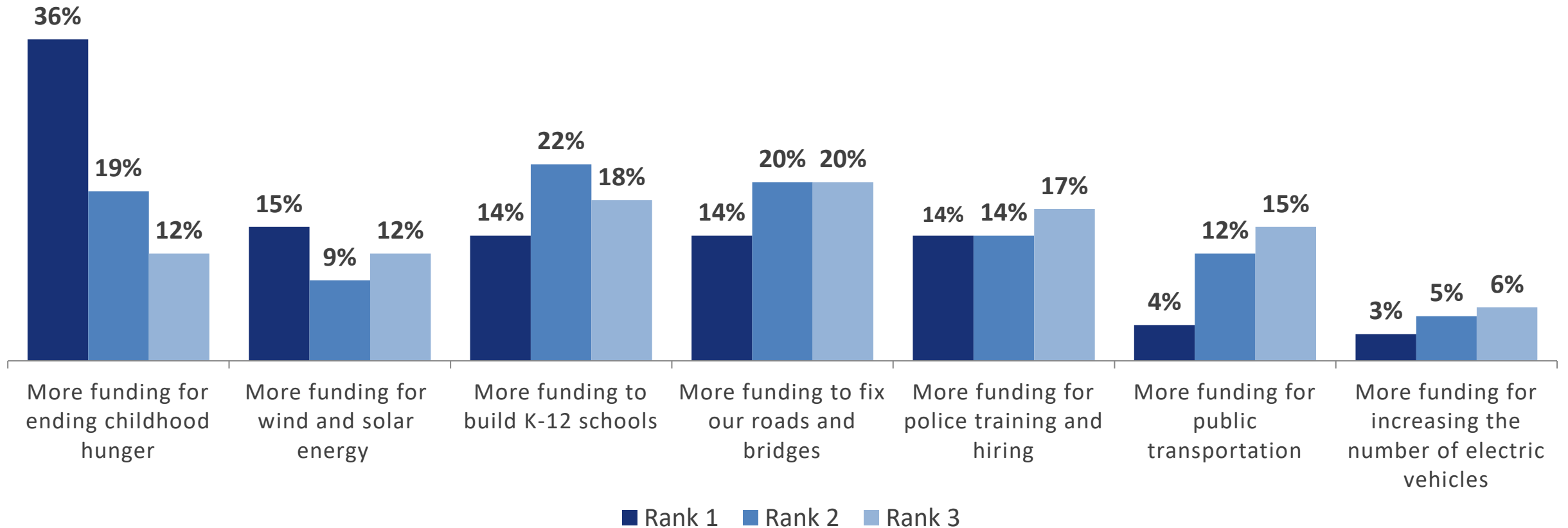


BREAKOUT: ISSUE CONCERNS

- A majority of Maryland voters are very concerned about the high cost of oil and gas. Middle aged voters, Republicans, and non-college voters are most likely to be very concerned.
- Nearly half of Maryland 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	54%	49%
Male	51%	43%
Female	57%	55%
Under 45	54%	56%
45-64	59%	42%
65+	48%	48%
Baltimore mm	54%	45%
DC mm	54%	54%
Non-college	59%	48%
College	49%	51%
Republican	64%	22%
Independent	54%	44%
Democrat	49%	65%
Less than \$40k	55%	51%
\$40k-\$80k	54%	46%
\$80k or more	52%	51%

FEDERAL FUNDING PRIORITY

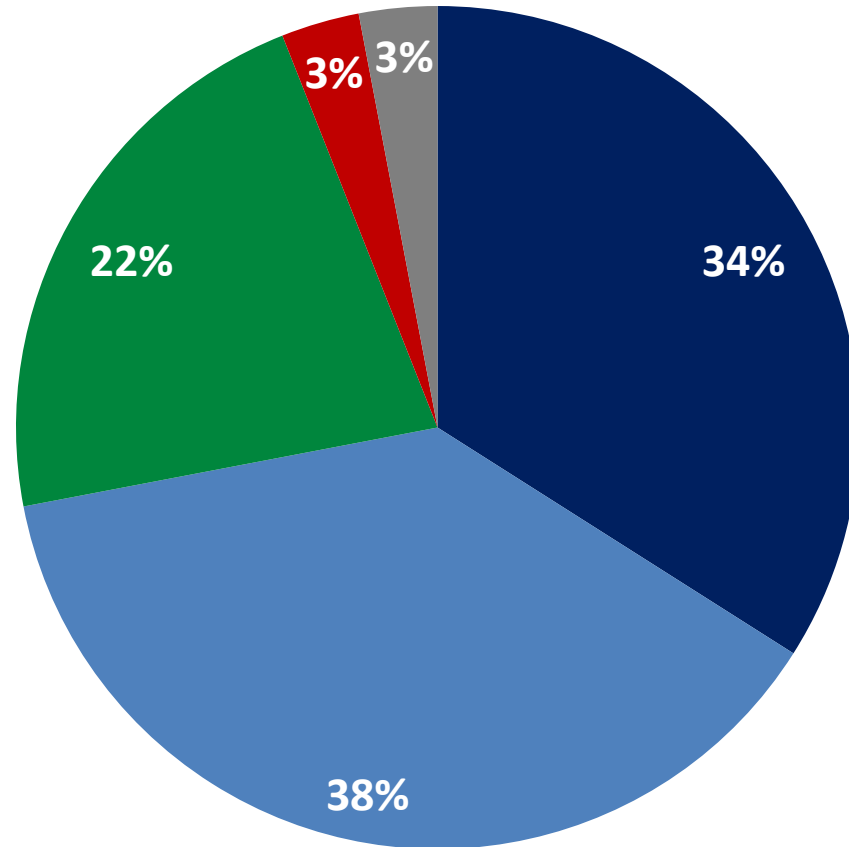


BREAKOUT: FEDERAL FUNDING PRIORITY RANK 1

- Over a third of Maryland voters say that more funding for ending childhood hunger is most important, followed more funding for wind and solar energy.
- Just 3% of Maryland 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	36%	14%	15%	14%	14%	4%	3%
Male	24%	20%	17%	17%	13%	3%	5%
Female	46%	8%	13%	12%	15%	4%	2%
Under 45	41%	12%	14%	9%	15%	6%	4%
45-64	34%	12%	14%	16%	17%	3%	3%
65+	30%	19%	17%	20%	9%	2%	3%
Baltimore mm	35%	12%	14%	18%	15%	3%	4%
DC mm	36%	16%	16%	11%	13%	5%	3%
Non-college	45%	11%	9%	16%	14%	2%	2%
College	25%	17%	21%	13%	14%	5%	4%
Republican	24%	20%	7%	31%	13%	1%	4%
Independent	36%	17%	14%	12%	16%	3%	3%
Democrat	40%	9%	19%	8%	13%	6%	4%
Less than \$40k	46%	10%	9%	14%	12%	5%	3%
\$40k-\$80k	33%	12%	15%	17%	15%	5%	3%
\$80k or more	26%	19%	19%	13%	15%	3%	5%

INCREASED ENERGY COSTS



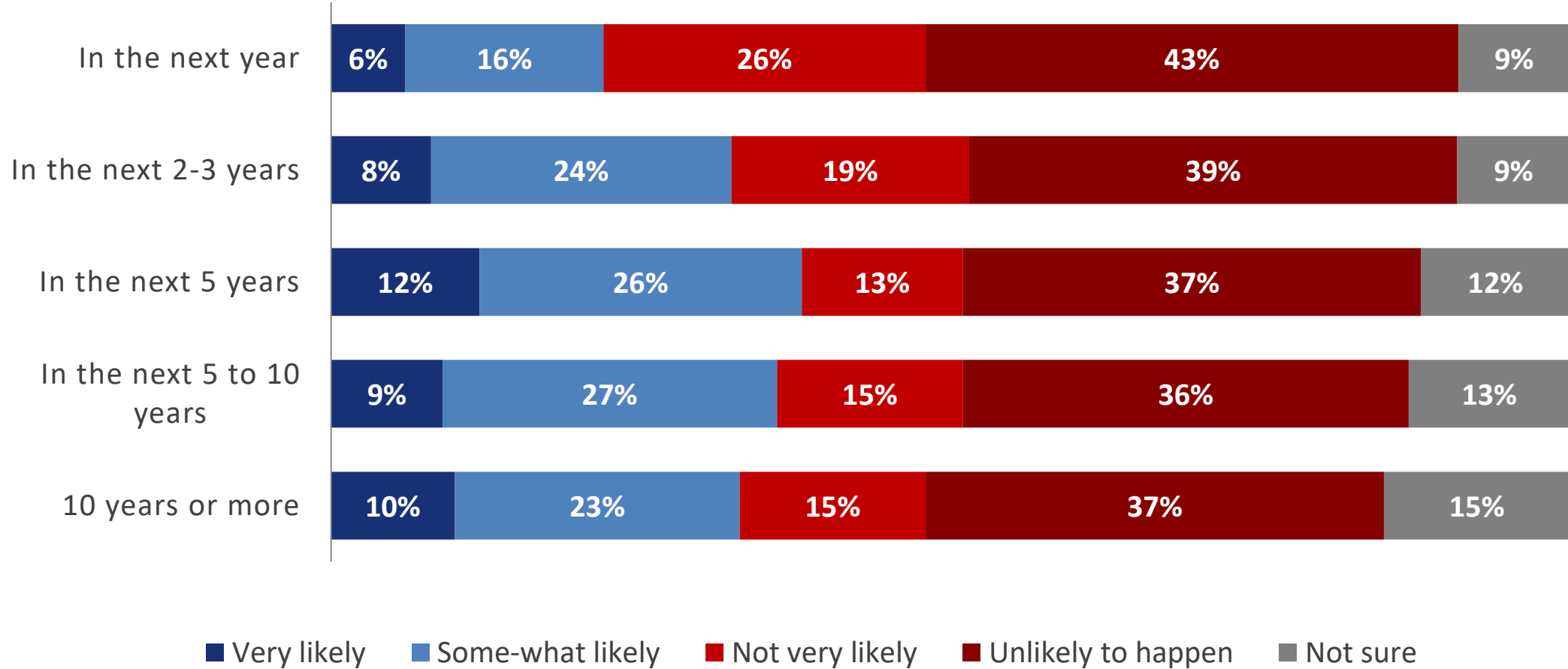
- It is making it hard to make ends meet
- It is not affecting my spending on needed items such as food but noticing the effect on my bank account
- I don't like it, but not really affecting me or my finances much
- Doesn't affect me at all
- Not sure

BREAKOUT: INCREASED ENERGY COSTS

- A third of Maryland voters say increased energy costs is making it hard to make ends meet and another 38% say its not affecting their spending on need items but noticing the effect on bank account.
- Just 25% say it's not affecting them much or at all.
- Over two in five 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	34%	38%	22%	3%	3%
Male	25%	43%	27%	3%	1%
Female	41%	35%	17%	3%	4%
Under 45	36%	37%	21%	3%	4%
45-64	41%	37%	18%	2%	2%
65+	21%	43%	29%	4%	3%
Baltimore mm	38%	37%	19%	4%	2%
DC mm	29%	40%	26%	2%	4%
Non-college	39%	37%	17%	3%	4%
College	28%	40%	27%	3%	2%
Republican	36%	37%	23%	2%	2%
Independent	33%	41%	21%	3%	1%
Democrat	33%	37%	22%	4%	3%
Less than \$40k	44%	37%	12%	3%	5%
\$40k-\$80k	37%	33%	23%	5%	2%
\$80k or more	22%	45%	31%	2%	1%

ELECTRIC VEHICLE

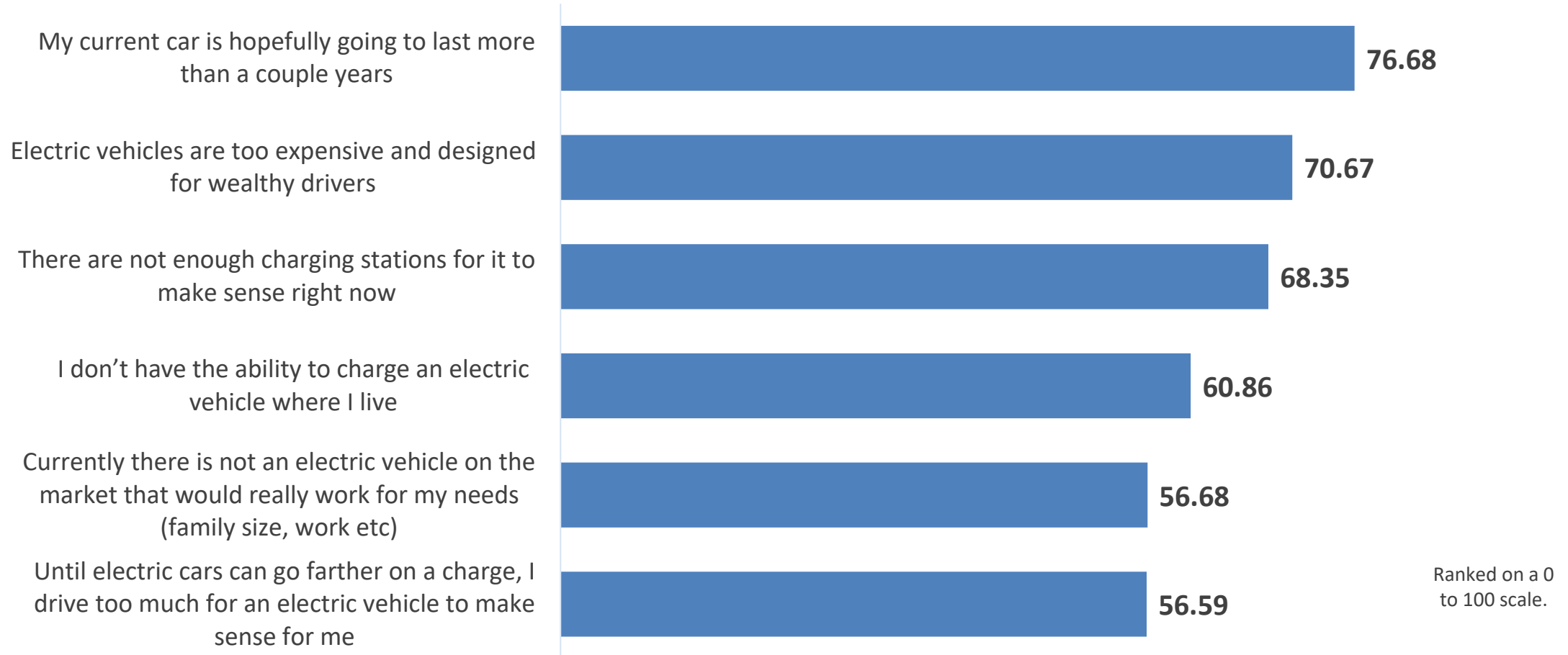


BREAKOUT: ELECTRIC VEHICLE

- Over one in five Maryland voters say they are very or somewhat likely to buy an electric vehicle in the next year.
- Younger voters, men, college voters, and voters in the DC media market 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	22%	33%	38%	36%	33%
Male	27%	41%	47%	39%	36%
Female	18%	26%	30%	34%	30%
Under 45	32%	41%	47%	45%	43%
45-64	19%	34%	38%	35%	31%
65+	11%	20%	25%	27%	23%
Baltimore mm	19%	29%	31%	32%	31%
DC mm	26%	37%	46%	41%	36%
Non-college	18%	27%	31%	31%	30%
College	25%	38%	45%	42%	36%
Republican	12%	20%	24%	27%	29%
Independent	22%	36%	45%	40%	33%
Democrat	26%	36%	40%	40%	37%
Less than \$40k	23%	30%	31%	28%	29%
\$40k-\$80k	21%	29%	40%	37%	37%
\$80k or more	24%	42%	45%	46%	37%

REASONS FOR NOT BUYING AN ELECTRIC VEHICLE



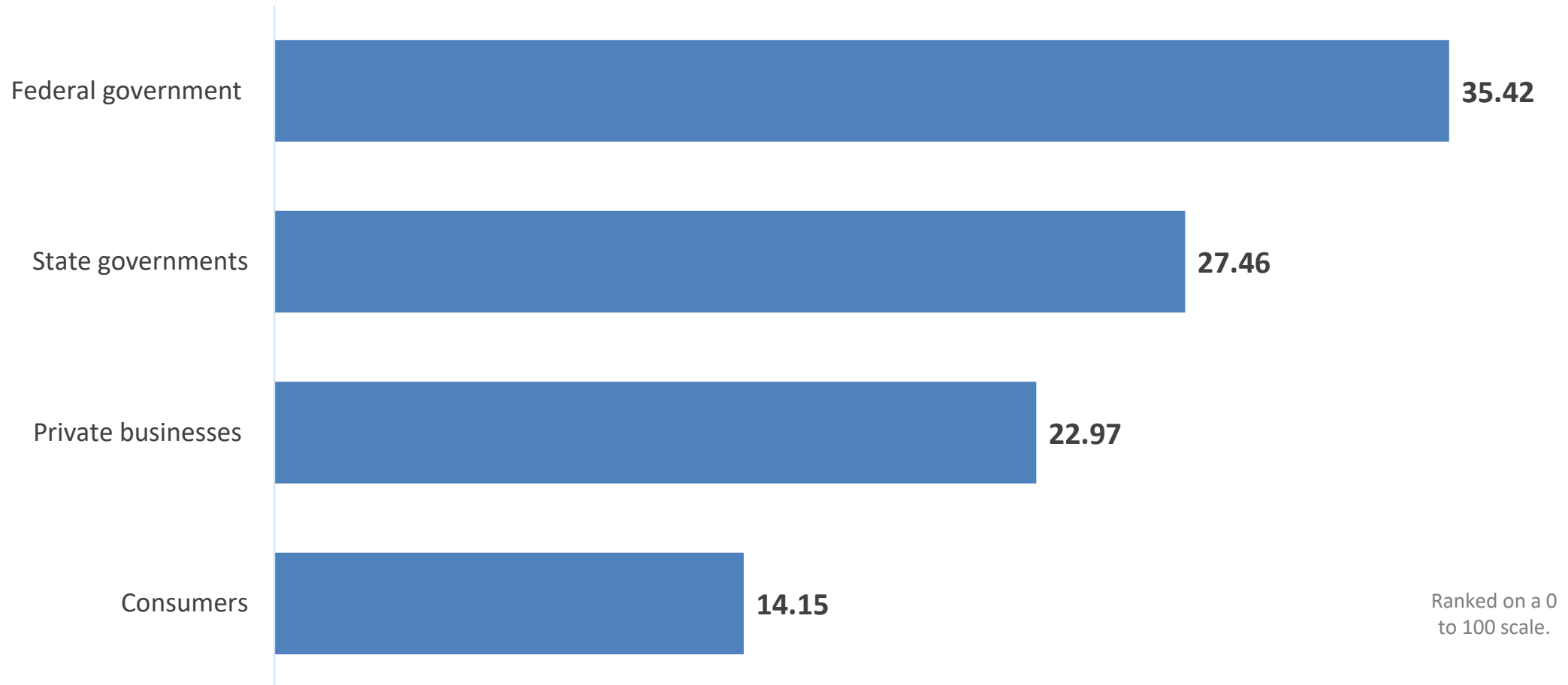
BREAKOUT: NOT BUYING AN ELECTRIC VEHICLE

- A majority of Maryland voters who are not very likely to buy an electric car in the next two years say their current car should last longer.
- Two in five also strongly agree that there aren't enough charging stations and that they're too expensive.

	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	53%	44%	40%	36%	29%	27%
Male	55%	45%	48%	33%	32%	29%
Female	51%	44%	33%	40%	27%	26%
Under 45	41%	37%	31%	35%	23%	25%
45-64	56%	51%	41%	36%	32%	25%
65+	66%	47%	51%	39%	35%	33%
Baltimore mm	57%	50%	42%	42%	33%	30%
DC mm	49%	38%	37%	30%	25%	23%
Non-college	50%	50%	41%	43%	31%	32%
College	57%	39%	38%	29%	28%	22%
Republican	66%	55%	50%	43%	43%	41%
Independent	55%	45%	40%	37%	30%	26%
Democrat	46%	38%	35%	33%	21%	21%
Less than \$40k	44%	44%	39%	43%	29%	28%
\$40k-\$80k	52%	47%	35%	37%	24%	26%
\$80k or more	61%	41%	45%	31%	35%	28%

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



Ranked on a 0 to 100 scale.

BREAKOUT: CHARGING STATION FUNDING

- Three in ten Maryland voters think the federal government should provide at least half of the infrastructure for charging stations.

	Federal government	State government	Private business	Consumers
TOTAL	31%	15%	11%	5%
Male	28%	10%	14%	5%
Female	33%	19%	9%	5%
Under 45	23%	19%	8%	7%
45-64	34%	14%	13%	5%
65+	37%	10%	14%	3%
Baltimore mm	31%	16%	10%	6%
DC mm	31%	14%	12%	4%
Non-college	32%	17%	10%	5%
College	30%	12%	13%	5%
Republican	32%	8%	17%	7%
Independent	30%	16%	13%	7%
Democrat	31%	16%	7%	3%
Less than \$40k	33%	20%	8%	5%
\$40k-\$80k	30%	14%	10%	5%
\$80k or more	32%	12%	14%	4%

Q16. When it comes to building out the infrastructure of charging stations in Maryland 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%

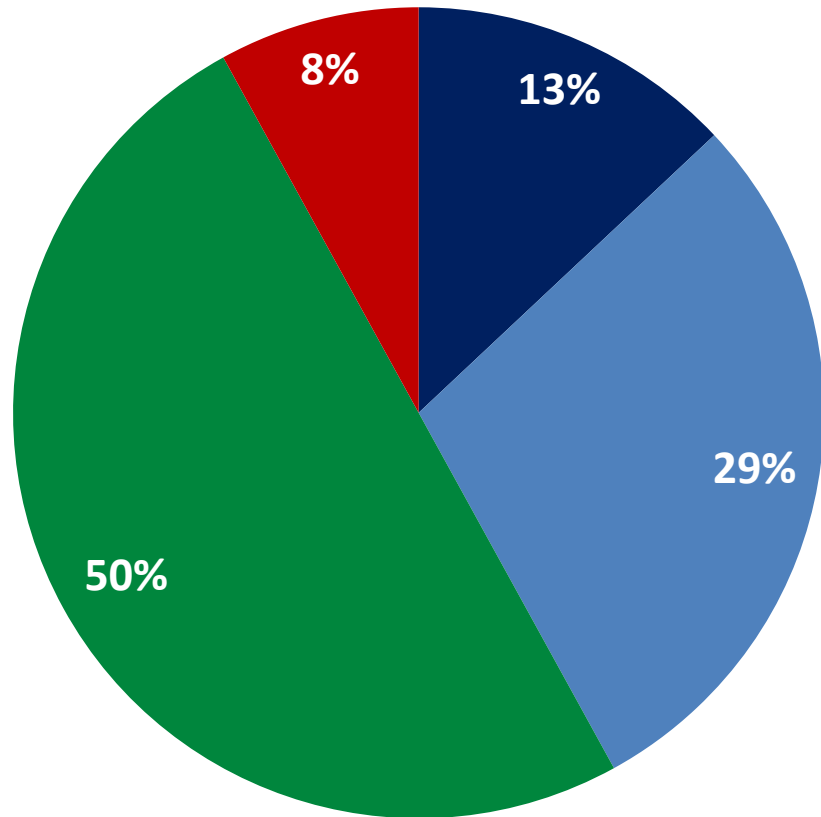
BREAKOUT: CHARGING STATION FUNDING

- Thirty-six percent of Maryland voters say most of the funding for charging stations should come from the federal government.
- Sixteen percent say it should mostly be private businesses and 14% 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	36%	14%	16%	7%	12%	1%	7%	6%
Male	37%	14%	21%	9%	9%	1%	6%	3%
Female	35%	15%	12%	6%	15%	1%	8%	9%
Under 45	25%	17%	14%	12%	14%	1%	11%	6%
45-64	39%	15%	16%	3%	12%	2%	7%	7%
65+	47%	9%	21%	6%	11%	0%	2%	4%
Baltimore mm	37%	16%	15%	7%	12%	1%	6%	5%
DC mm	35%	12%	18%	7%	12%	1%	8%	7%
Non-college	35%	16%	13%	7%	15%	1%	9%	5%
College	37%	13%	20%	8%	9%	1%	5%	7%
Republican	39%	8%	20%	9%	9%	1%	6%	7%
Independent	32%	14%	18%	10%	14%	0%	6%	5%
Democrat	38%	17%	13%	5%	11%	1%	9%	6%
Less than \$40k	39%	19%	11%	4%	14%	1%	8%	5%
\$40k-\$80k	33%	14%	14%	11%	12%	1%	9%	7%
\$80k or more	39%	12%	22%	7%	10%	2%	4%	5%

Q16. When it comes to building out the infrastructure of charging stations in Maryland 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%

MOVING TO ELECTRIC VEHICLES



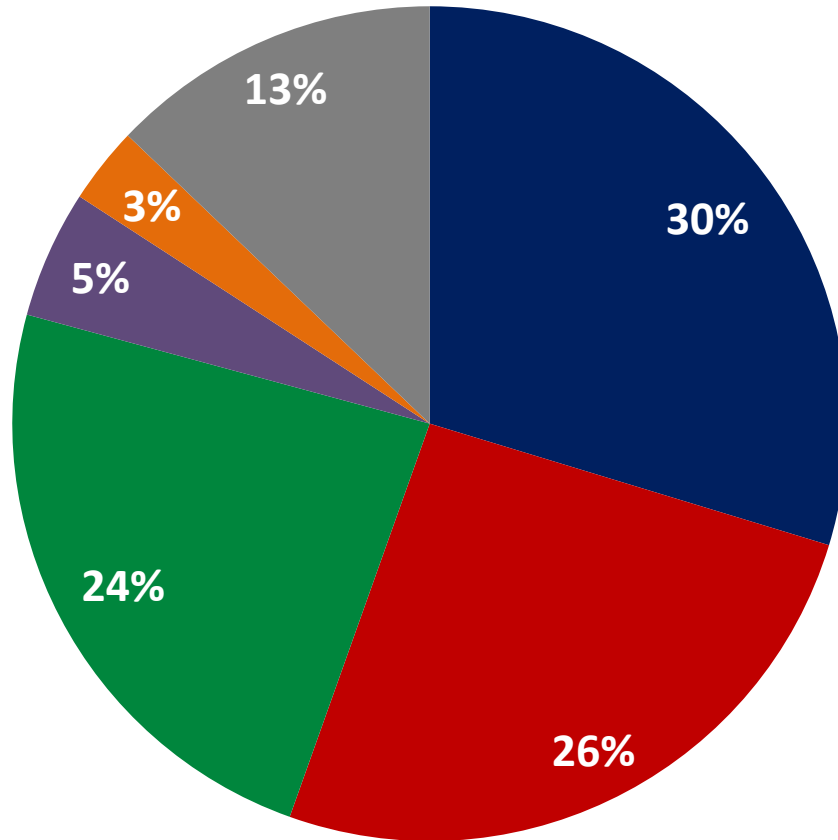
- We need to do whatever we can to get as many electric vehicles on the road as quickly as possible in Maryland, including the state subsidizing the costs of the cars, banning the sale of new gas and diesel vehicles, and building the infrastructure for charge
- The movement towards electric vehicles 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 Maryland.
- Government spending should focus on priorities like schools, healthcare and public safety, not trying to make more people buy electric vehicles
- Electric vehicles will probably not ever be a big market in Maryland, and we need to focus on other things.

BREAKOUT: MOVING TO ELECTRIC VEHICLES

- Half of Maryland 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.
- Three in ten voters say the movement is already happening.
- Just 13% 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 Maryland, and we need to focus on other things.
TOTAL	13%	29%	50%	8%
Male	16%	34%	45%	6%
Female	12%	26%	53%	10%
Under 45	16%	22%	54%	8%
45-64	9%	34%	49%	8%
65+	15%	34%	44%	7%
Baltimore mm	11%	30%	50%	8%
DC mm	16%	28%	49%	7%
Non-college	10%	25%	56%	9%
College	17%	34%	43%	6%
Republican	5%	23%	59%	13%
Independent	11%	32%	51%	6%
Democrat	19%	30%	44%	6%
Less than \$40k	9%	24%	57%	10%
\$40k-\$80k	15%	29%	47%	9%
\$80k or more	17%	34%	44%	5%

ENCOURAGE MORE EVS



- Subsidize the cost of buying a new electric vehicle for residents
- Let the new vehicle market reflect consumer demand
- Provide state funding to ensure that there are more charging stations available around the state.
- Ban or limit the number of gas vehicles that can be sold in Maryland
- Other
- Not sure

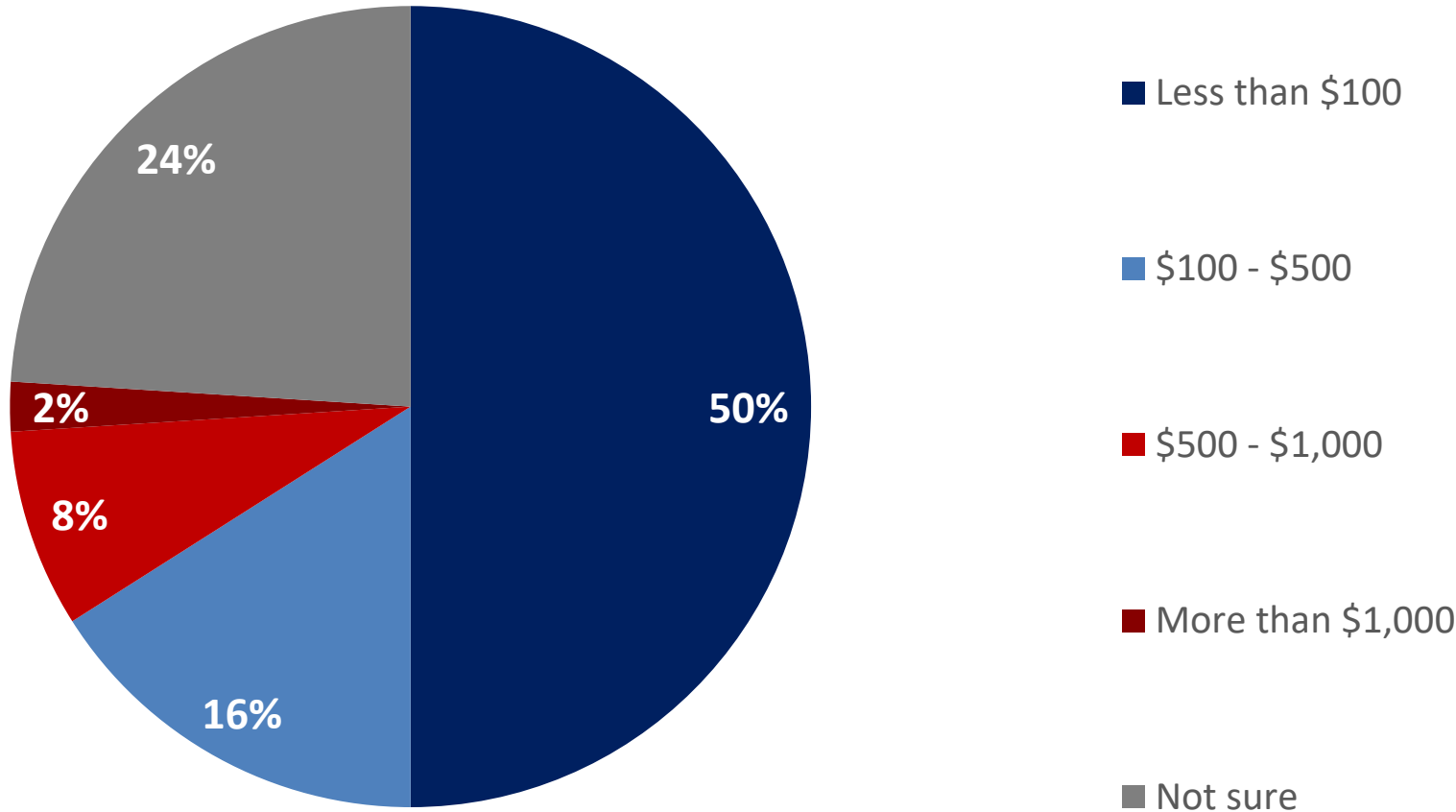
BREAKOUT: ENCOURAGE MORE EVS

- To encourage more EVs, three in ten voters support subsidizing the cost of buying a new EV.
- A quarter think Maryland should provide state funding to ensure that there are more charging stations available around the state and another quarter say let the new vehicle market reflect consumer demand.
- Just 5% 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 Maryland	Let the new vehicle market reflect consumer demand	Other	Not sure
TOTAL	30%	24%	5%	26%	3%	13%
Male	34%	23%	4%	32%	2%	5%
Female	26%	25%	5%	22%	4%	19%
Under 45	31%	27%	8%	20%	3%	12%
45-64	31%	18%	4%	31%	2%	14%
65+	26%	26%	1%	30%	4%	12%
Baltimore mm	33%	19%	5%	28%	3%	12%
DC mm	26%	29%	4%	24%	3%	13%
Non-college	29%	23%	4%	22%	4%	17%
College	30%	24%	5%	31%	1%	9%
Republican	21%	16%	4%	39%	5%	15%
Independent	32%	18%	3%	31%	2%	13%
Democrat	33%	32%	6%	17%	1%	11%
Less than \$40k	30%	26%	3%	22%	4%	16%
\$40k-\$80k	31%	21%	8%	26%	3%	11%
\$80k or more	30%	26%	3%	30%	1%	10%

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

WILLING TO PAY MORE FOR EV ADOPTION



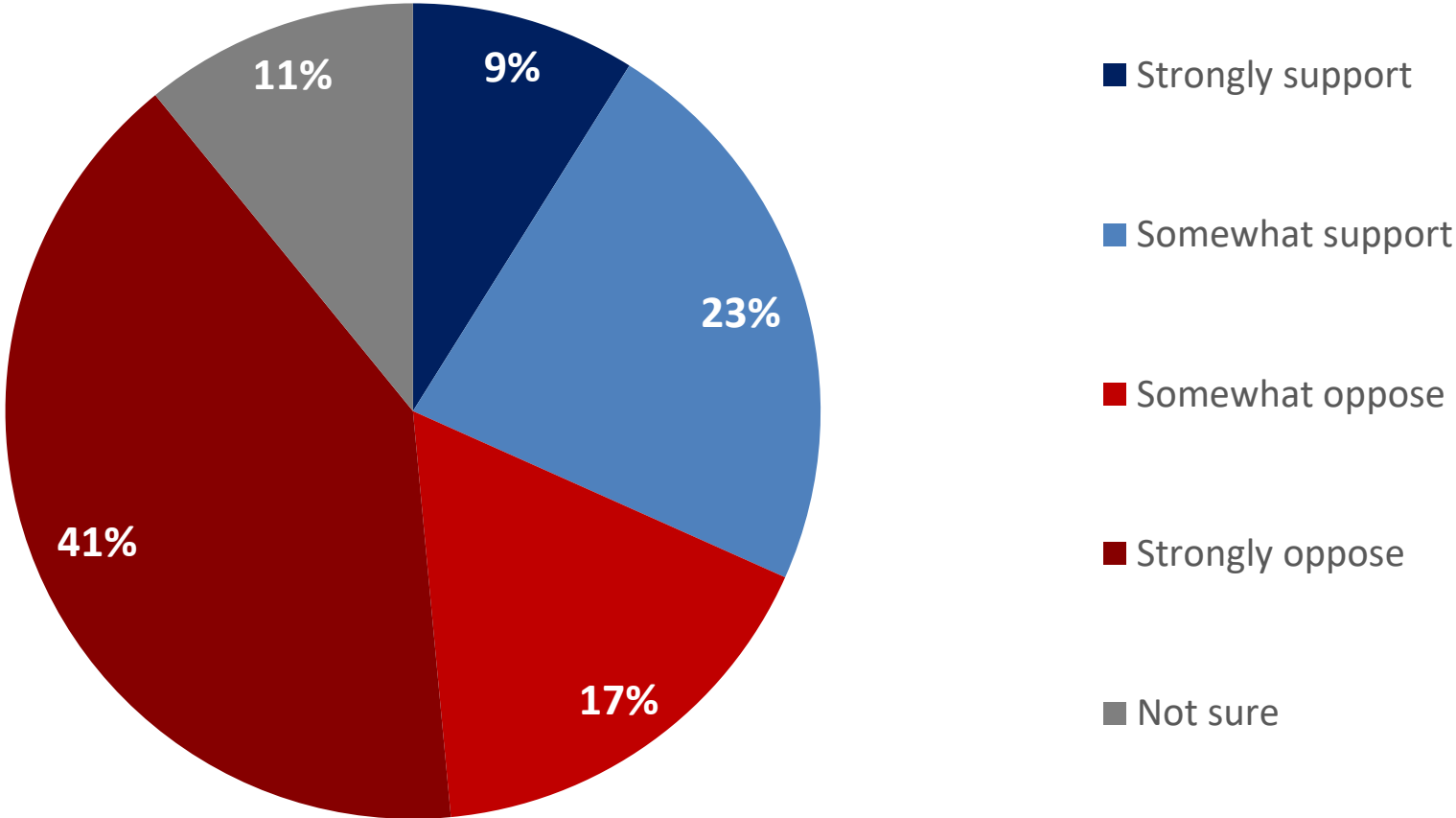
BREAKOUT: WILLING TO PAY MORE FOR EV ADOPTION

- Half of Maryland voters are willing to pay less than \$100 a year to speed up the adoption of electric vehicles. Older voters and Republicans are most likely to say they would pay less than \$100.
- Sixteen percent are willing to pay between \$100-\$500.

	Less than \$100	\$100 - \$500	\$500 - \$1,000	More than \$1,000	Not sure
TOTAL	50%	16%	8%	2%	24%
Male	51%	20%	10%	3%	17%
Female	49%	13%	6%	1%	30%
Under 45	43%	20%	14%	5%	18%
45-64	50%	16%	5%	0%	29%
65+	61%	11%	3%	0%	25%
Baltimore mm	52%	13%	8%	2%	25%
DC mm	47%	20%	8%	2%	23%
Non-college	48%	14%	7%	1%	29%
College	52%	18%	9%	2%	19%
Republican	63%	9%	5%	1%	22%
Independent	55%	13%	8%	2%	22%
Democrat	40%	22%	10%	2%	26%
Less than \$40k	50%	12%	6%	2%	30%
\$40k-\$80k	45%	20%	12%	1%	22%
\$80k or more	55%	19%	7%	3%	17%

RESTRICT GAS VEHICLE SALES

BANS TO END SALE OF GAS VEHICLES



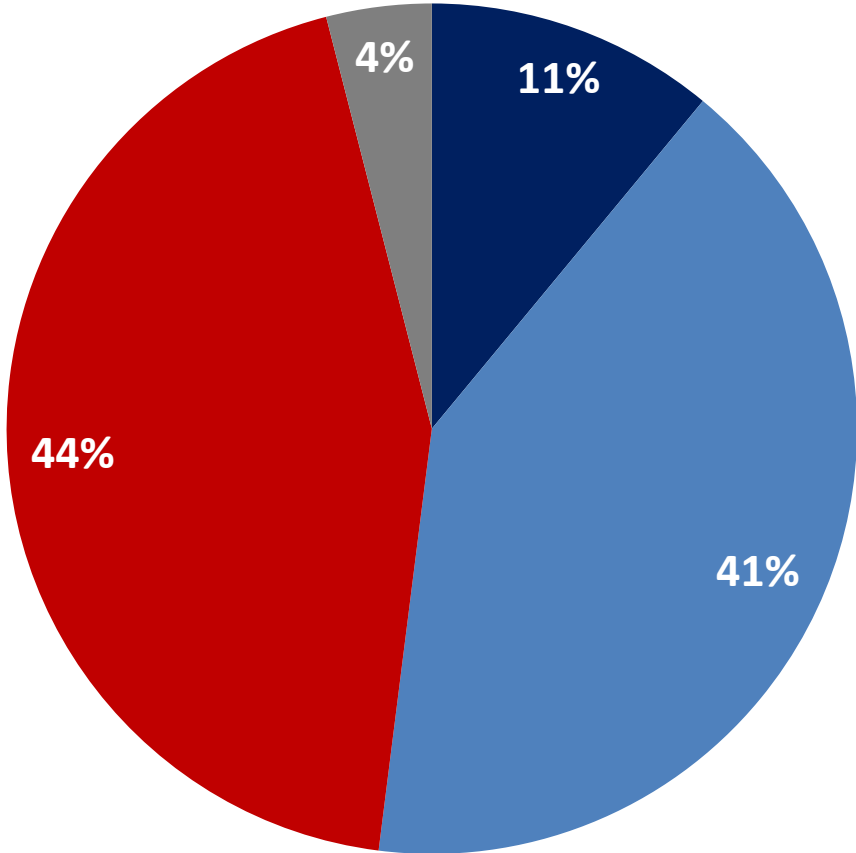
Q18. As you may have heard in the news recently; some states have been implementing plans to ban the sales of all new gas and diesel-powered vehicles within the next 10 years or so. Based on what you know about this issue, would you say you support or oppose plans like these which would create state government bans to end the sale of gas-powered vehicles?

BREAKOUT: BANS TO END SALE OF GAS VEHICLES

- A majority of voters oppose bans of the sale of gas-powered vehicles, just 31% support these plans.
- Voters over 45, Baltimore media market voters, non-college voters, Republicans, and lower income voters are most likely to oppose the ban.

	Total support	Total oppose	Not sure
TOTAL	31%	58%	11%
Male	34%	59%	6%
Female	28%	58%	14%
Under 45	40%	49%	11%
45-64	26%	65%	9%
65+	24%	64%	12%
Baltimore mm	26%	65%	9%
DC mm	37%	51%	12%
Non-college	26%	63%	11%
College	37%	54%	10%
Republican	15%	80%	5%
Independent	28%	66%	6%
Democrat	42%	43%	16%
Less than \$40k	27%	61%	13%
\$40k-\$80k	35%	56%	9%
\$80k or more	32%	59%	9%

CLEAN CARS ACT



- Strongly support Maryland continuing to adopt all of California's vehicle emission laws
- Maryland should consider each of California's vehicle policies individually before adopting them in our state
- Maryland should not be adopting vehicle policies written by California or any other state
- Other

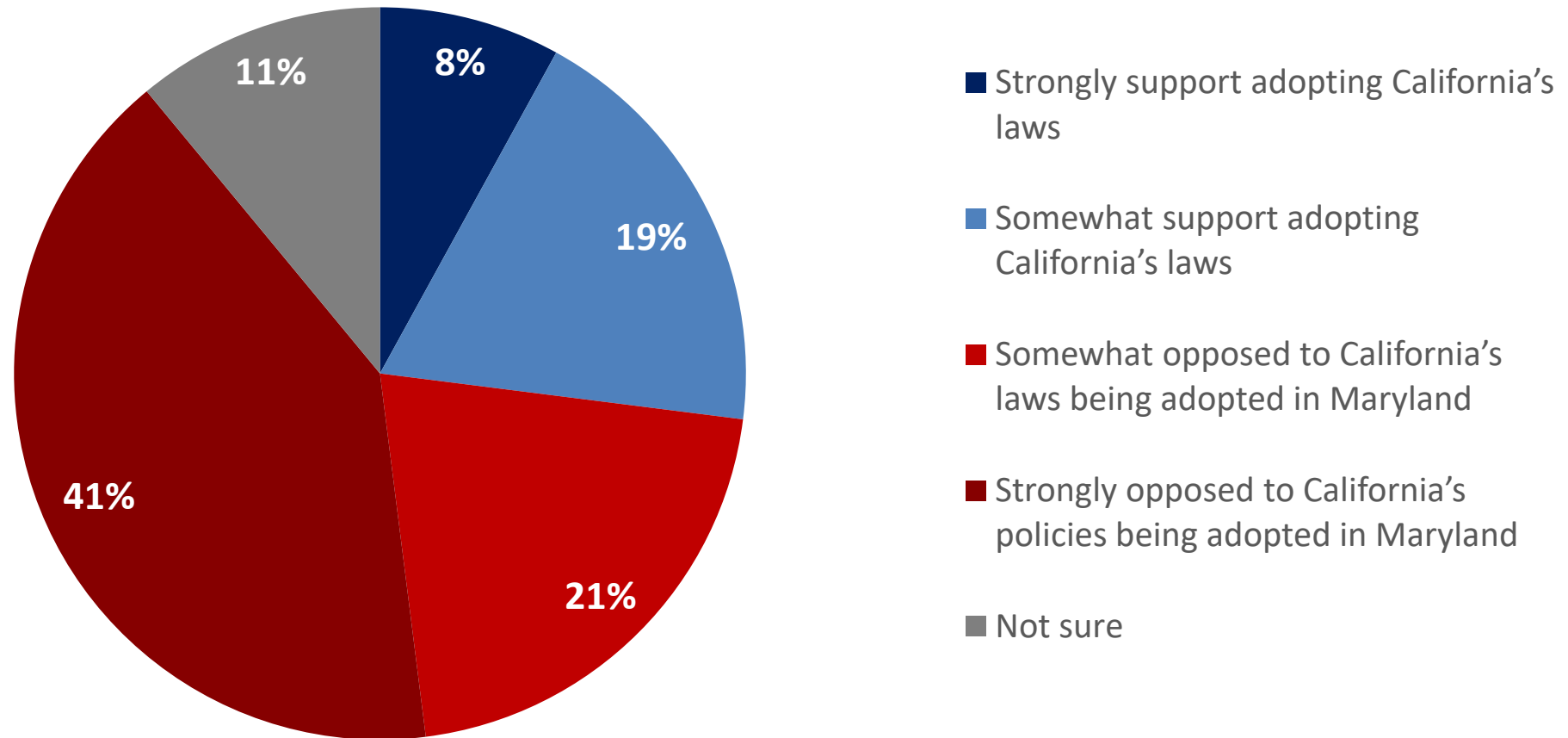
Q19. As you may have heard, in 2007, Maryland passed the Clean Cars Act which requires the state to automatically adopt California policies when it comes to vehicle emission standards. Among other things, this law requires Maryland to adopt any future regulations that California passes when it comes to vehicle emission policies and it does not require the Maryland legislature to consider or approve these California policy changes before they're made law. Based on this information, how do you feel about Maryland automatically adopting California's vehicle policies

BREAKOUT: CLEAN CARS ACT

- A plurality of Maryland voters say the state should not be adopting vehicle policies written by California or any other state. Men, voters over 45, Baltimore media market voters, and Republicans are most likely to agree.
- Two in five voters say the state should consider each of California's vehicle policies individually before adopting them. A majority of younger voters and Democrats agree with this view.
- Just 11% of Maryland voters strongly support the state continuing to adopt all of California's vehicle emission laws.

	Strongly support Maryland continuing to adopt all of California's vehicle emission laws	Maryland should consider each of California's vehicle policies individually before adopting them in our state	Maryland should not be adopting vehicle policies written by California or any other state	Other
TOTAL	11%	41%	44%	4%
Male	12%	40%	48%	1%
Female	10%	42%	41%	7%
Under 45	12%	51%	31%	7%
45-64	7%	37%	52%	3%
65+	14%	31%	53%	1%
Baltimore mm	10%	37%	49%	5%
DC mm	12%	46%	39%	3%
Non-college	7%	40%	47%	6%
College	15%	42%	41%	2%
Republican	4%	25%	69%	2%
Independent	11%	41%	46%	2%
Democrat	14%	50%	31%	5%
Less than \$40k	11%	37%	44%	8%
\$40k-\$80k	10%	43%	46%	2%
\$80k or more	12%	42%	45%	1%

ADOPT CA'S REGS OR WRITE OWN RULES

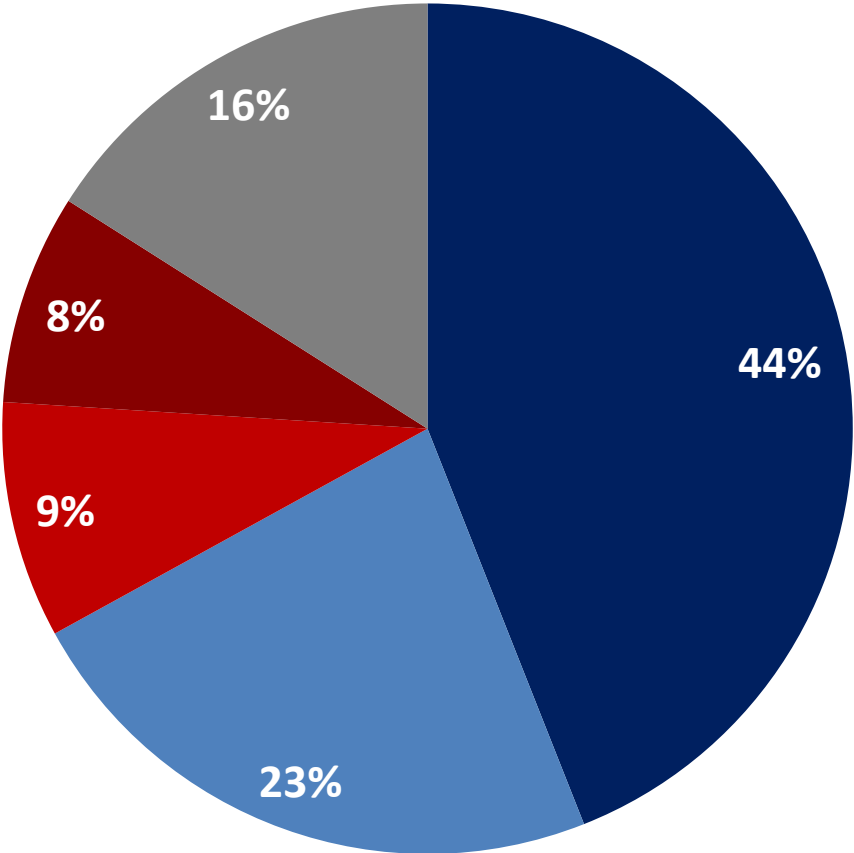


BREAKOUT: CA'S REGS OR WRITE OWN RULES

- Over three in five Maryland 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%	63%	11%
Male	29%	65%	6%
Female	25%	60%	15%
Under 45	29%	58%	13%
45-64	23%	67%	10%
65+	27%	64%	9%
Baltimore mm	24%	66%	10%
DC mm	30%	59%	11%
Non-college	22%	67%	11%
College	32%	59%	10%
Republican	10%	86%	4%
Independent	23%	68%	9%
Democrat	39%	48%	13%
Less than \$40k	23%	62%	15%
\$40k-\$80k	29%	62%	8%
\$80k or more	29%	65%	6%

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

Q21. And regardless of whether or not you feel Maryland should be adopting California's ban on sales of new gasoline and diesel vehicles, do you feel the Governor should be required to get approval from the Maryland legislature before any new regulations are implemented to ban the sale of new vehicles or do you feel that the governor should move forward on his own?

BREAKOUT: REQUIRING STATE LEGISLATURE APPROVAL

- Over two-thirds of Maryland voters support the Governor getting approval from the state legislature.
- Just 17% of voters support the Governor moving unilaterally.

	Total support governor getting approval from the state legislature	Total support governor moving unilaterally	Not sure
TOTAL	67%	17%	16%
Male	73%	16%	11%
Female	61%	17%	21%
Under 45	61%	22%	17%
45-64	68%	13%	19%
65+	75%	14%	11%
Baltimore mm	68%	15%	17%
DC mm	66%	19%	15%
Non-college	61%	18%	21%
College	73%	15%	12%
Republican	73%	11%	16%
Independent	73%	14%	13%
Democrat	60%	22%	17%
Less than \$40k	61%	15%	23%
\$40k-\$80k	62%	23%	15%
\$80k or more	76%	14%	10%

MESSAGING

Regardless of how much you support the move to electric vehicles, Maryland should 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...



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



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



A full ban on EV sales in Maryland 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...



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 Maryland to mandate EV sales or ban the sale of other cars when the marketplace is...



The federal government has its own standards and programs to encourage more people to purchase EVs. If all 50 states are working under the same rules it will make the transition to EVs much easier and probably faster

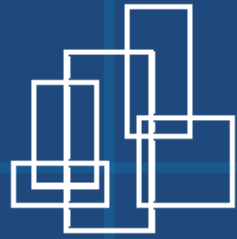


Ranked on a 0 to 10 scale.

BREAKOUT: MESSAGING

- A majority of voters say that Maryland should not be forced to follow California and 47% strongly agree that government mandates never work well 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.

	MD should not be forced to follow CA	Govt mandates never work well	Complete ban is a step too far	Cross state lines to buy cars	Will alienate many consumers	Marketplace is heading that way	Easier if all states had same rules
TOTAL	54%	47%	47%	46%	43%	37%	29%
Male	58%	50%	51%	49%	48%	43%	33%
Female	50%	44%	44%	43%	39%	33%	27%
Under 45	46%	36%	36%	41%	34%	32%	24%
45-64	57%	48%	50%	45%	45%	34%	29%
65+	60%	61%	60%	55%	55%	50%	39%
Baltimore mm	57%	52%	53%	48%	44%	38%	30%
DC mm	50%	41%	41%	44%	43%	37%	28%
Non-college	56%	46%	48%	48%	42%	34%	26%
College	52%	48%	47%	44%	45%	41%	33%
Republican	67%	57%	61%	60%	49%	41%	21%
Independent	61%	53%	50%	49%	50%	43%	34%
Democrat	42%	37%	39%	38%	35%	32%	30%
Less than \$40k	51%	50%	46%	43%	42%	31%	29%
\$40k-\$80k	50%	39%	43%	41%	41%	37%	26%
\$80k or more	58%	51%	54%	53%	45%	43%	34%



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