

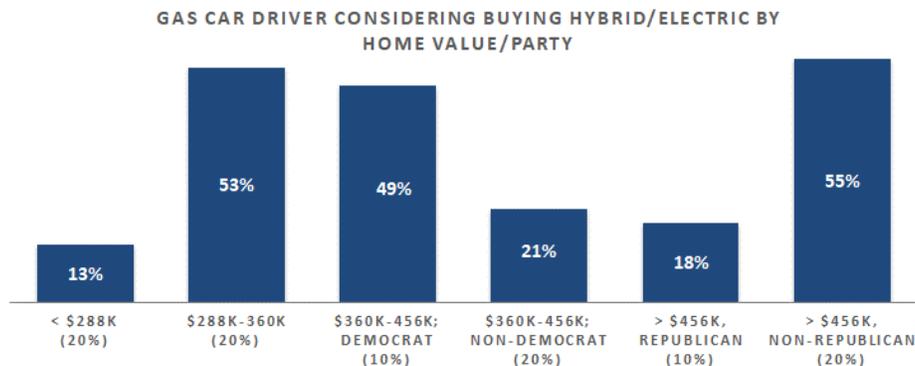
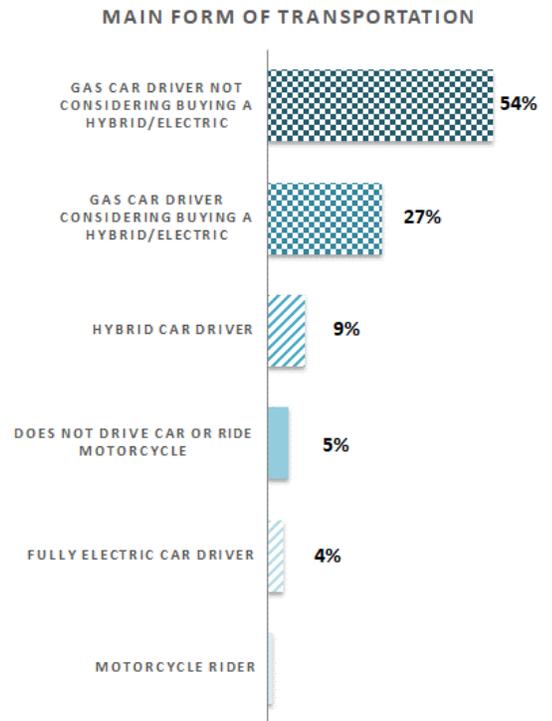
one of the economic topics as most important. That does not mean economics won't be vote determinative in November: 24% of registered voters put it at the top of their list.

Other issues are each mentioned by fewer than 5%, so homelessness, housing, and high costs really have San Diegans' attention. Local leaders should take note.

How we Get Around

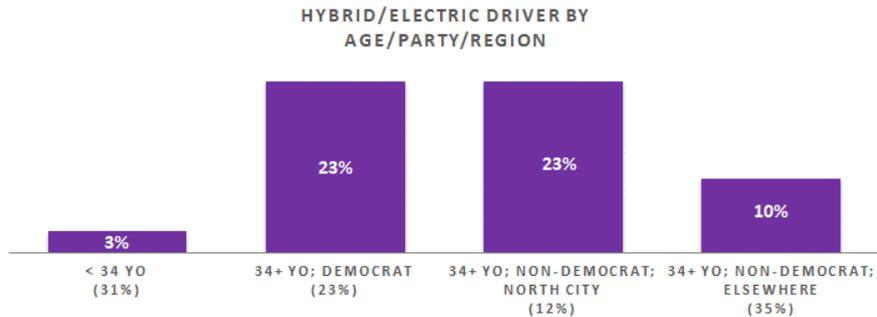
San Diegans heavily depend on their cars, as 94% drive one. The ubiquity of automobiles should be a caution sign for promoters of mass transit and alternate transportation. And despite the record-high fuel prices, 54% drive a gasoline-powered car and don't intend to buy a hybrid or electric vehicle. That's not surprising given the economic uncertainty and a new car's expensive price tag.

However, a substantial 27% of gas-powered vehicle owners *are* considering purchasing a hybrid or electric car. Affluent gas car drivers are more inclined to consider buying a hybrid or electric car, although Republican voters among them are much more resistant. Even when home values are between \$360,000 and \$456,000, Republicans and non-partisan drivers are far less likely to ditch their internal combustion engines. It is fascinating to find politics driving purchase intent, as Democrats are clearly more open to an electric or hybrid vehicle. Even most drivers of gas cars in more modest communities desire hybrid/electric cars. It is only drivers whose home values are less than \$290,000 that are rarely interested in trading in their gas car.



There's no evidence that higher gas prices -- or the fear of them in the future -- spurs more interest in electric/hybrid vehicles. In fact, the reverse is true. Only 13% of gas car drivers who believe gas prices will get a lot higher next year are considering moving away from gas, but more than 50% of those who think prices will *decrease* are doing so. This is regardless of the driver's socioeconomic status.

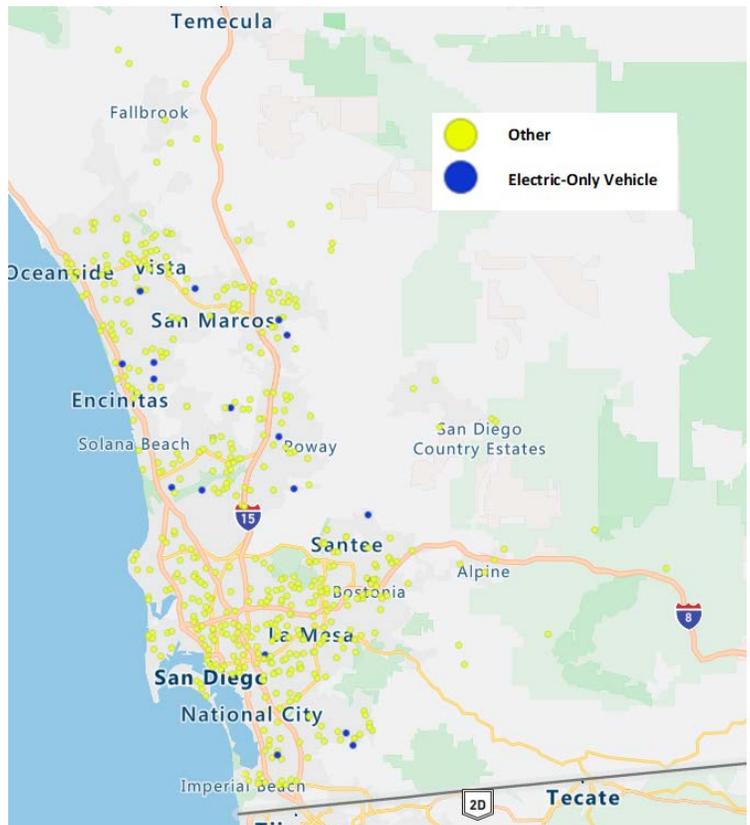
Even if everyone who is thinking about buying a hybrid or electric did so, gas-powered cars would still dominate. That's because just 13% of County residents drive a car that's not solely powered by fossil fuels. Most of those are hybrids, which are much more popular with non-Latino women. Overall, owning a non-gas-powered vehicle is largely a function of age, where a resident lives, and, perhaps most surprisingly, their politics. Residents younger than 34 rarely own hybrid or electric cars; perhaps they will age into one. Ownership reaches 17% among those older than 33, and 23% among Democrats over



the age of 33. Electrics and hybrids are also fairly popular with non-Democrats if they live in the City of San Diego's northern part, which is a hotspot for alternatives to gas-powered vehicles. So, among non-Democrats older than 33, non-gas cars remain decidedly unpopular outside the north city. How much of the huge 65% that currently don't drive hybrids and electrics will change their tune as we near the year 2035 and the possible mandate that all new cars sold in California be zero-emission vehicles?

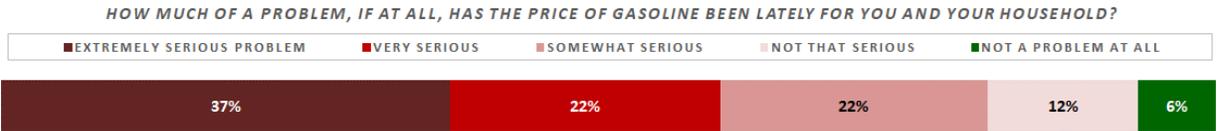
Completely electric cars remain something of a novelty in San Diego County. Just 4% of residents drive them now, although that doubles between SR-56 and SR-78 which includes many affluent neighborhoods. On the other hand, *none* in our survey who live between SR-54 and SR-94 own an electric car. Although this disparity partly relates to varying income levels -- after all, electric cars are new and are more expensive to buy -- another factor may be the presence of charging stations in certain areas and not in others.

Just 1% of San Diegans ride a motorcycle and 5% don't drive a car or ride a motorcycle. Motorcycle riders are typically White or Asian American. Residents lacking a car or motorcycle are mostly seniors, tend to live in the more urban area between I-8 and SR-52 and are more than twice as likely to be Black.

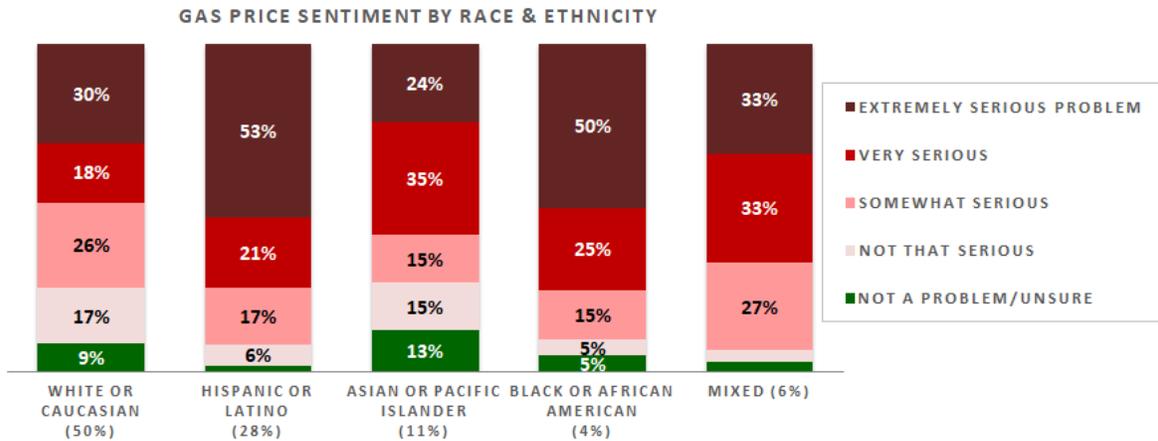


A Serious Problem with Gas Prices

California currently has the highest average gas prices in the nation at \$6.43 per gallon. San Diegans are really feeling it in their wallet: eight-in-ten say the price of gasoline has been a problem, with most saying it is an extremely or very serious problem rather than only somewhat serious. Although 9% spontaneously name gas prices as the County’s most important issue, most residents clearly feel a lot of pain at the pump when asked about them directly.



That pain has many components. Latino, Black, and multi-ethnic residents are much more impacted by high gas prices than are white or Asian residents. While most Latinos characterize the price as an extremely serious problem, and most Blacks do the same, just 30% of whites and only 24% of Asians are similarly impacted.



Gas prices also have a partisan tinge to them, as Democrats are not nearly as bothered by the price of gas. Half of them do not regard what they pay as a very serious problem, while 53% of non-partisans, and nearly 70% of Republicans and non-registrants say this is a very or extremely serious problem in their households.

Geographically, south suburban residents are highly sensitive to rising gas prices. Seventy-one percent say it’s an extremely serious problem for them. Residents younger than 25 are also disproportionately impacted, much more so than older residents, as they are twice as likely to say prices are an extremely serious problem. Those residing in areas with very high home values are much less concerned about gas prices. Where home values are lowest, more than three quarters regard gas prices as a very or extremely serious problem.

There is one sure way to beat sharply rising gas costs: by not driving at all. Only 30% of those who do not drive or ride a motorcycle see gas prices as more than a somewhat serious problem, and 46% of them do not see this as much of a problem. Unfortunately, not driving is nearly impossible for almost all

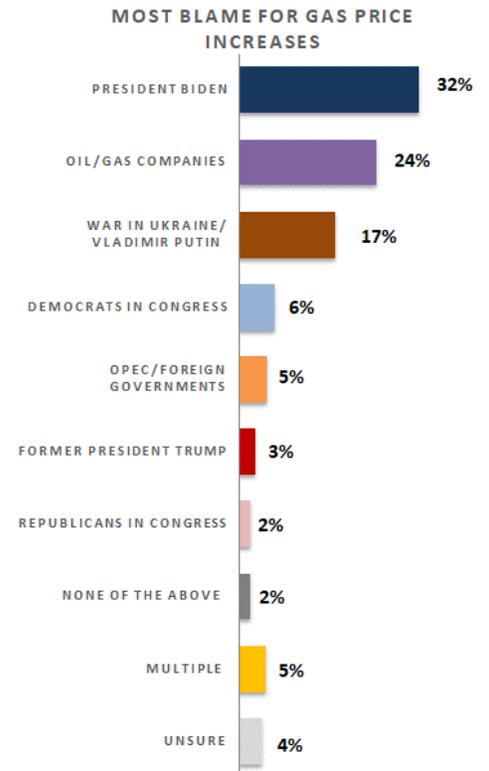
County residents. Electric car drivers are split on whether gas prices are a problem; 44% say they are not, but half say they are, presumably because others in their household need to fill up.

Placing Blame for the Nation's High Gas Prices

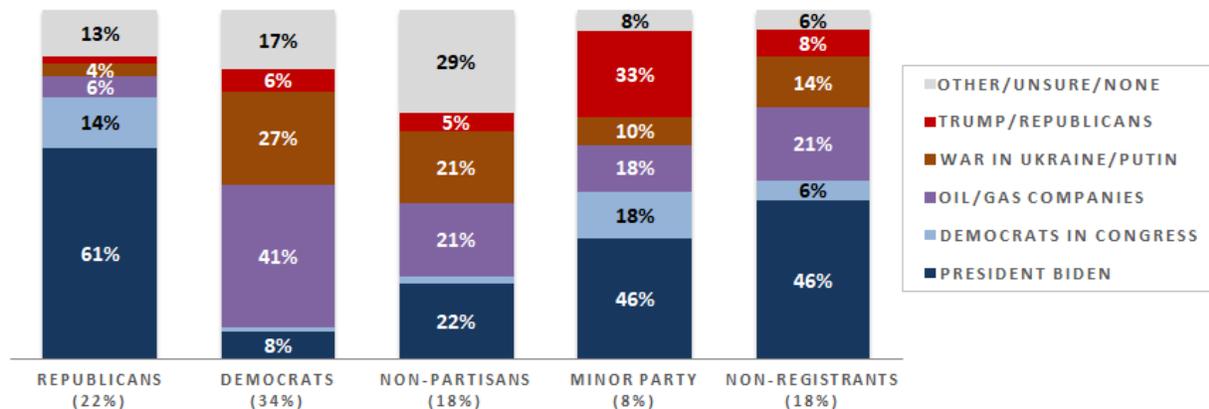
Three entities get the brunt of the blame for high gas prices nationwide. At 32%, President Biden takes the biggest hit and, when combined with the 6% who blame Congressional Democrats, nearly four-in-ten residents directly fault Democrats. Conversely, just 5% call out former President Trump or Republicans in Congress. Democrats are taking serious political heat on this issue and will likely feel the ramifications of this sentiment at the ballot box come November, especially if prices stay high or worsen.

Twenty-four percent feel oil and gas companies are to blame, while 17% point to the war in Ukraine or Vladimir Putin. When added to the 5% citing OPEC or foreign governments, 46% of San Diegans blame gas prices on an entity outside the US government, so this is not purely a partisan issue.

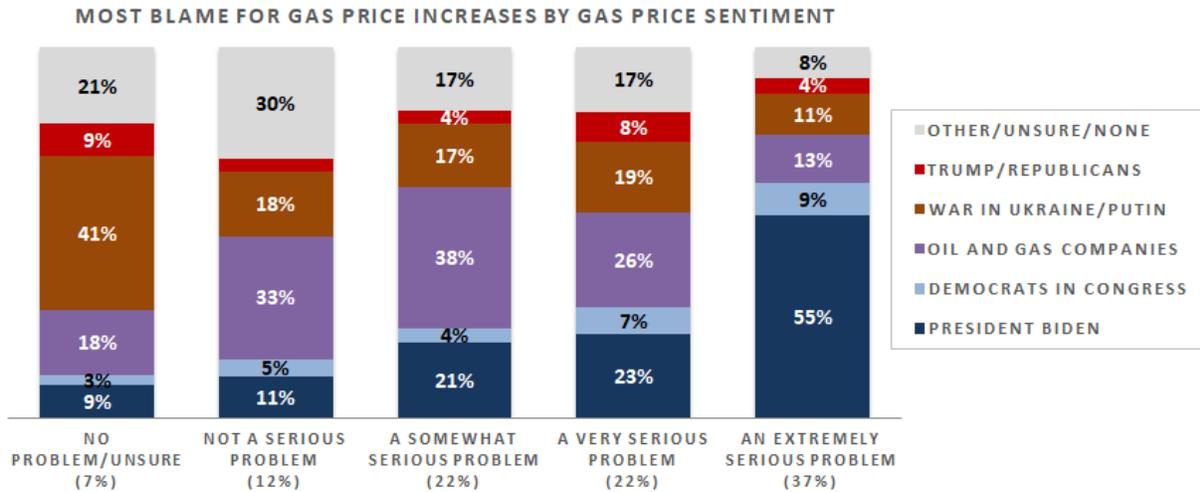
Republicans are naturally eager to blame President Biden for rising gas prices. Democrats focus their ire more on oil and gas companies, and, to a lesser extent, the war in Ukraine. The important nonpartisan group of voters spread the blame around. Although 22% say Biden is at fault, similar percentages blame oil and gas companies and the war in Ukraine. Heightening the electoral ramifications, those who see rising gas prices as more personally problematic blame President Biden far more often. Most who say the problem is extremely serious say he is the one mainly at fault. Those less impacted spread the blame around, more often focusing on oil and gas companies and the war in Ukraine.



MOST BLAME FOR GAS PRICE INCREASES BY PARTY



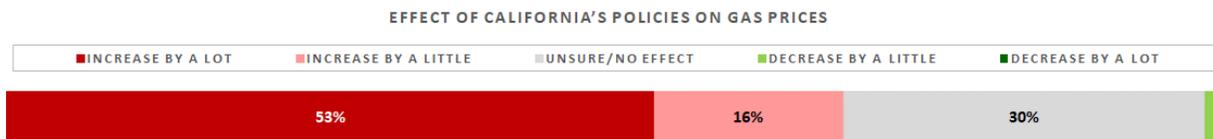
As discussed earlier, politics influence vehicle choice and that clearly plays out here. The drivers who resist buying a hybrid or electric car most commonly blame President Biden for the rising gas prices. On the other hand, drivers of hybrids – and those considering buying one or an electric car – more often see oil and gas companies as taking advantage of the situation. Those who already drive a fully electric car most often say the war in Ukraine and Vladimir Putin are to blame.



Latino residents are also far more likely to see President Biden as the main culprit. While only 29% of whites, 25% of Blacks and 21% of Asian American residents point to the president, 42% of Latinos do so.

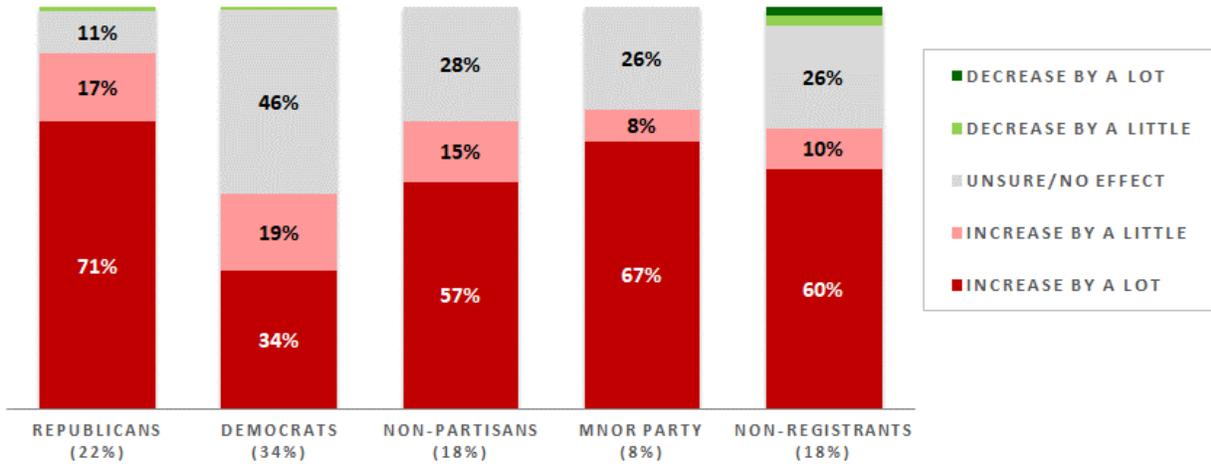
State Gas Policies

As San Diegans face a 3-cent state gas tax increase on July 1, a massive 69% of residents believe the state’s fuel policies have increased the price of gas in California, with most saying the policies have driven up prices *a lot*. Fifteen percent believe the policies have no impact on the prices while another 15% are unsure, but virtually no one thinks the state’s policies have decreased the cost. Given that Democrats hold a veto-proof supermajority in the legislature, this may be interpreted as another form of culpability on the issue. Although California is not the primary offender for current fuel prices *nationally*, most San Diegans perceive that state policies exacerbate the problem *locally*.



Unsurprisingly, things naturally get political on this issue. Nearly all Republican voters see the legislature and governor as complicit in the high cost of gas. However, they are not the only ones feeling this way, as most nonpartisans, those registered with minor parties, and even non-registrants have come to believe that state policies are responsible for increasing gas prices by *a lot*. And we cannot leave out Democrats either: even most of them believe California’s policies increase gas prices. The difference in opinion between the partisans is a matter of degree, as “only” 34% of Democrats say state policies increase gas prices by *a lot*.

EFFECT OF CALIFORNIA'S POLICIES ON GAS PRICES BY PARTY



Those heavily impacted by gas prices also tend to blame California policies more than do those who have less of a problem with the cost of gas. Two-thirds enduring an *extremely* serious problem and even 56% of those who regard gas prices as only *very* serious, feel state policies increase gas prices by a lot.

White residents typically see state policies as increasing gas prices the most, but Latino and multi-ethnic residents are not far behind. It is Black residents who do not pile on the state, as 60% of them say state policies do not affect gas prices or are unsure about the question. Drivers of fully electric cars are another group who feel the state has no effect on gas prices.

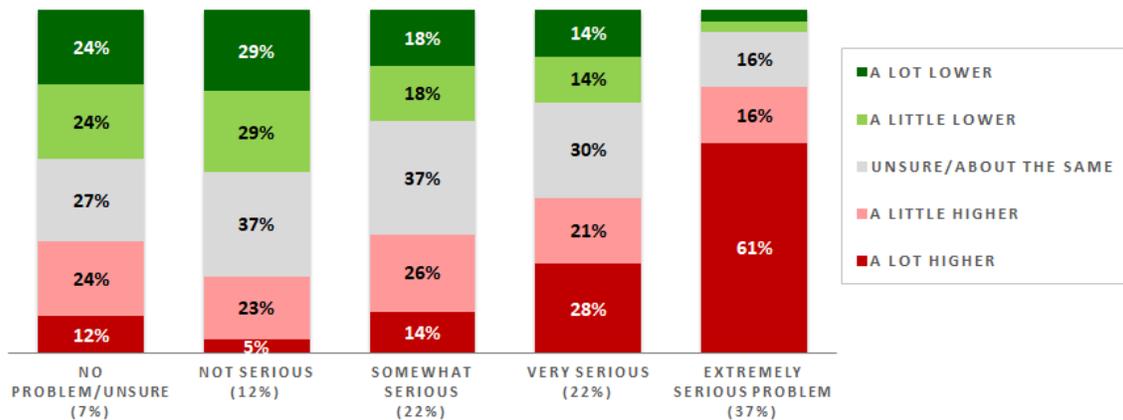
Gas Price Predictions

For most San Diegans, the outlook on gas prices is pessimistic. Fifty-three percent think gas prices will be higher a year from now, and one-third believe they will be *a lot* higher. There is no end in sight for high gas prices for many. Just 20% think they will be lower, and only a small 6% anticipate them being *a lot* lower. Another 20% say prices will be about the same, while 7% are unsure.

WILL GAS PRICES IN SAN DIEGO COUNTY BE HIGHER OR LOWER A YEAR FROM NOW?

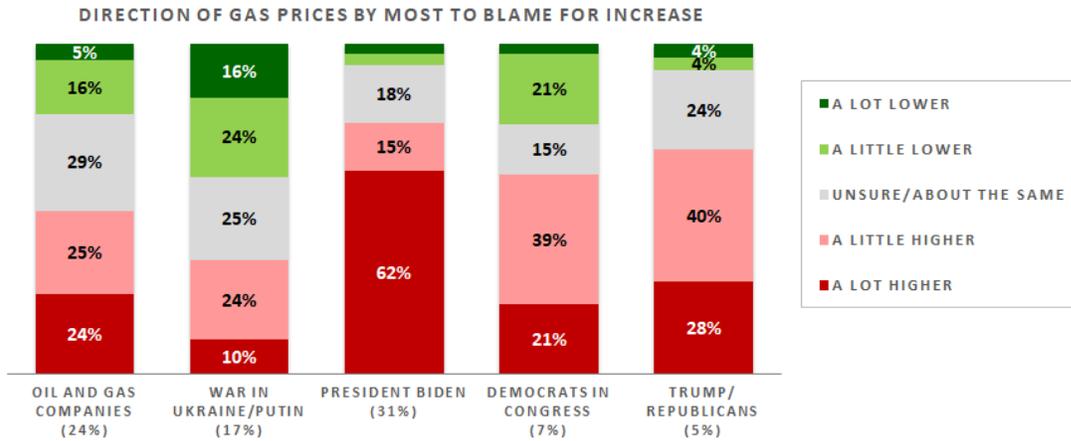


DIRECTION OF GAS PRICES BY GAS PRICE SENTIMENT



The dire prediction that gas prices will get *a lot* higher is stronger among those enduring the worst of the situation. Sixty-one percent experiencing an extremely serious problem in their household also believe gas costs will get a lot higher next year.

Residents who blame President Biden overwhelmingly sense prices will be higher a year from now, and 62% predict they'll get *a lot* higher. And why not? In the minds of these folks, the chief architect of rising gas prices will still be in control in 2023. On the other hand, those who blame the war in Ukraine or Vladimir Putin offer mixed predictions. For them, rising gas prices are due to events -- not policy-based -- so they believe costs will come down when war fears calm.



Drivers thinking about buying a hybrid or electric car are quite relaxed about the direction of gas prices; after all, such a purchase would lessen -- or eliminate -- their need for gasoline. While 61% of those *not* considering such a purchase feel gas prices will increase a lot, only 41% who *are* considering a hybrid or electric vehicle share that view, and 30% of them actually think the price of gas will be *lower* a year from now. The *current* cost of gas is *not* spurring purchase consideration for many folks.

White residents evince far less negativity about the direction of gas prices than do others, especially Latinos, among whom 71% believe gas prices will get higher. Young adults are also much more downbeat about the cost of gas; a whopping 90% of them believe gas prices will be higher next year.

A Close Look at San Diego's Communities of Color

The Black Community

- ✓ Blacks are slightly less likely than San Diegans overall to think things in the county are on the wrong track, although their top two issues of concern – homelessness and housing – align with broader sentiment.
- ✓ They are nearly three times more likely than the overall population to not drive a car or motorcycle, as 14% are non-drivers/riders.
- ✓ While fewer in the Black community are buying gas, that does nothing to lessen the impact of prices on the 86% who do. Half say current prices are an extremely serious problem for them, so fuel costs hit the Black community hard.
- ✓ Like the overall population, Blacks tend to think gas prices will increase over the next year.
- ✓ They are twice as likely (60% vs. 30%) to be unsure about the effect of state policies on fuel prices and three times more likely (15% vs 5%) to blame multiple people or entities for skyrocketing gas prices. Although Blacks are overly impacted by sky-high gas prices, the root cause and primary perpetrator are not as clear-cut for them as they are to others.

The Asian Community

- ✓ Asian and Pacific Islanders' (AAPI) views regarding the direction of the county mirror the broader dubious mood.
- ✓ At 24%, housing affordability is the top issue for them.
- ✓ AAPI can be considered the “ambassadors” of eco-friendly vehicles. Fourteen percent already drive a fully electric vehicle and that climbs to 24% when hybrids are included.
- ✓ However, they are just as likely as all county residents to see gas prices as a very or extremely serious problem and to think prices will rise in the coming months.
- ✓ AAPI folks also differ from the broader population in their view of who or what is to blame for higher gas prices. Thirty percent see it as “Putin’s Price Hike,” but they align with the general population in perceiving that state policies raise prices. AAPI residents are twice as likely to be registered nonpartisans and tend to view the issue through a less partisan lens.

The Latino Community

- ✓ Latinos are also more negative than positive about the county’s direction.
- ✓ Primary concerns include homelessness and housing affordability, though a large 17% name gas prices as the most important issue.
- ✓ Their pocketbooks take a harder hit: 53% report gas prices are an extremely serious problem. Most believe prices will continue to climb; it’s a somber story for the Latino community.
- ✓ Latinos feel the heavier burden because they’re more often drivers – just 2% don’t drive a car or motorcycle – and more rely on the internal combustion engine.
- ✓ They blame President Biden for the nationwide price surge 46% of the time. They also fault California’s policies for their own pain at the pump, as a huge 71% feel those policies lead to higher gas prices.
- ✓ Latino San Diegans are disproportionately registered as Democrats, but their frustration with high gas prices coupled with Democratic leaders and policies taking the lion’s share of the blame should test their partisan loyalties in November.

Findings are based on the results from our poll of 505 San Diego County adult residents. The poll was conducted in English and Spanish by Competitive Edge Research & Communication (CERC), a national research firm based in San Diego, from June 2 through 7, 2022. The maximum margin of sampling error for the total sample is +/- 4.3%. The margin of sampling error for subgroups is larger. Interviews were conducted by trained professionals at CERC's El Paso, TX, facility, and via the web for residents with an e-mail address or cell phone number in the sample.