

MEMORANDUM

To: Interested Party
Re: Key Findings from Union of Concerned Scientists Dec 2019 Toyota Owners Poll

METHODOLOGY:

- *Field Dates: December 12-16 2019*
- *Sample: Toyota owners, nationally*
- *Sample Size: 1000 participants.*
- *Margin of Error: +/-3.1%*
- *Our sampling took care to mirror nationwide ideology and 2016 vote tallies:*
- *Our sampling took care to acquire variable ranges of age, income, geography, and education.*
- *Survey sample by vehicle model ownership mirrored Toyota 2019 YTD Sales Data as reported by Toyota North America.*

WHAT YOU REALLY NEED TO KNOW:

1. Toyota's failure to support strong vehicle emissions standards by joining the Trump Administration lawsuit in defense of their rollback of California and other states' authority to limit tailpipe pollution results in the company's favorability falling from 98% to 66% with their consumer base.
2. 81% of all Toyota owners believe that the company should support stronger pollution standards designed to help the environment and improve gas mileage. 75% of Republicans and 90% of Democrats who own Toyota vehicles agree.
3. 63% of all Toyota owners became less supportive of the company due to their decision to join the October 2019 lawsuit once informed that the environmental performance of their vehicle fleet actually got worse in recent years. *(As detailed in the 2017 Automotive Trends Report, Toyota was the only vehicle manufacturer whose emissions and fuel efficiency rates worsened from 2012 to 2017.)*
4. The number of Toyota consumers who would consider switching brands DOUBLES (23% to 54%) due to the company's decision to join the lawsuit opposing strong vehicle pollution standards.
5. Four in ten (39.7%) loyal Toyota consumers who initially said that they would definitely purchase another Toyota vehicle would consider switching brands due to the company's support for the lawsuit opposing strong vehicle pollution standards. *(Younger Toyota owners (age 18-34) are the most likely to initially consider a different manufacturer in the future.)*
6. 72% of Toyota owners say that their opinion of the company would improve if Toyota were to reverse course and oppose the lawsuit against strong vehicle pollution standards.

FINDINGS FROM PRE-BALLOT QUESTIONING

1. Our survey found Toyota owners have overwhelming initial positive favorability of Toyota as a company.
Which best describes your impression of Toyota as a company? (Pre-Ballot)

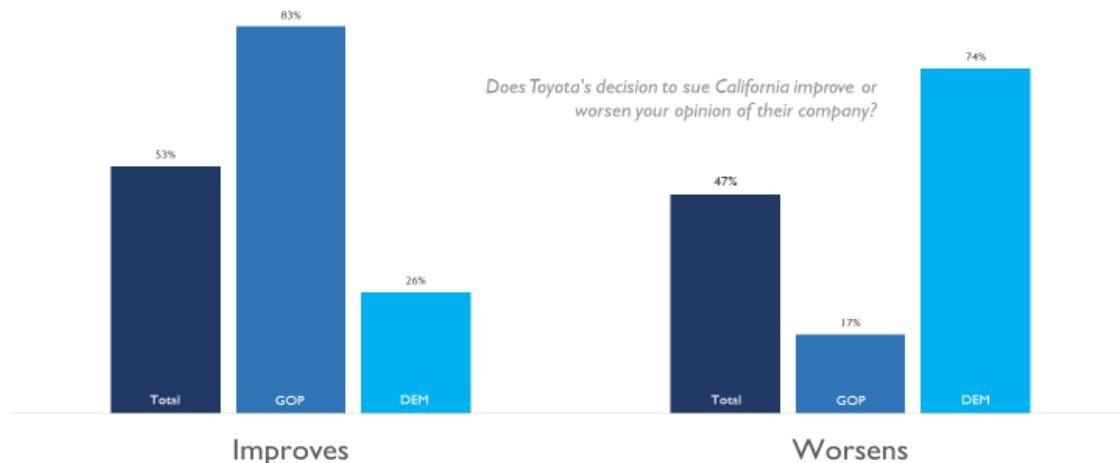


2. Initially, the vast majority of Toyota owners view the company as “green and sustainable” (90% agree).
(This opinion increases with age. 18-34 (85% agree), 35-49 (89% agree) 50-64 (91% agree), 65+ (95% agree).)
3. 63% of Toyota owners initially believe that Toyota is a leader in creating cars with good gas mileage. (32% of all Toyota owners surveyed chose “good gas mileage” as the number one or number 2 reason they purchased their Toyota Vehicle.)
4. Initially, 78% of Toyota owners said they would DEFINITELY purchase another Toyota in the future. (Of note, younger consumers (age 18-34) are 11% less likely to say that they’d definitely purchase another Toyota (67%).)

PERCEPTIONS OF THE CALIFORNIA LAWSUIT & EMISSIONS STANDARDS

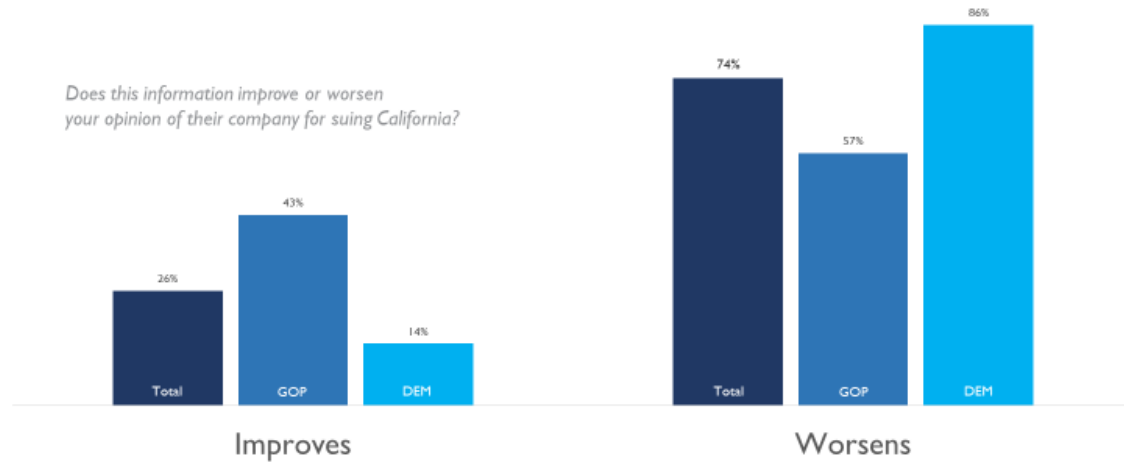
1. A vast majority (81%) of ALL Toyota owners believe that Toyota should support emissions standards. *(This holds true across ideological fault lines. 75% of Republican Toyota owners and 90% of Democrat Toyota owners believe that Toyota should support emissions standards.)*
2. Awareness of the California Lawsuit is low. Just 15% of all Toyota owners are either “actively following it” or “know the facts of the suit.” *(Awareness numbers rise only slightly in California where only 20% of Toyota owners are “actively following it” or “know the facts of the suit.”)*
3. Predictably, when initially informed about the details of the lawsuit, support and opposition for the lawsuit falls along party lines. Republican Toyota owners support a decision of the company to join action taken by the Trump Administration, while Democrat Toyota owners oppose the decision.

“To provide more context about the lawsuit, the Trump Administration is planning to freeze fuel efficiency requirements for the next 5 years instead of maintaining existing standards that increase fuel efficiency of new passenger cars by 7 mpg over that same time period. Currently, California has legal authority to set their state’s own emissions standards. The Trump administration’s lawsuit is seeking to revoke California’s existing ability to set stronger emissions standards for the state.”



- However; when further information that details motivations for Toyota’s support of the lawsuit is presented, public opinion changes drastically. The fact that Toyota is the only company whose fleet has gotten less efficient (higher emissions) over the past several years changes respondents’ opinions. (Even a majority of Republican Toyota owners (57%) – the group that were previously supportive of Toyota’s decision – say that this information worsens their opinion of the company.)

“A 2017 Automotive Trends Report lists emissions and mileage efficiency for all car manufacturers from 2012 to 2017. In this report, Toyota was the only manufacturer whose emissions and fuel efficiency worsened during that five-year period.”

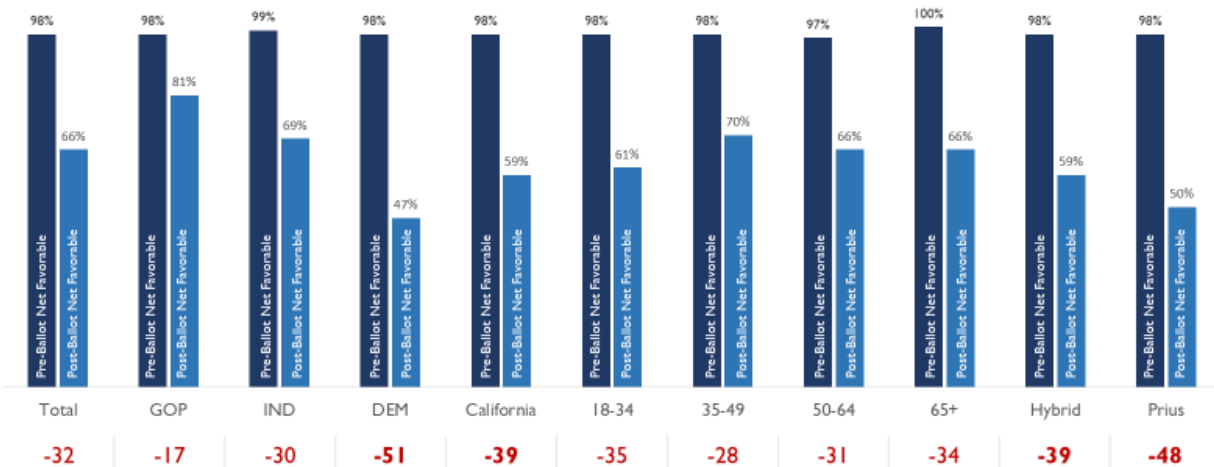


FINDINGS FROM POST BALLOT QUESTIONING

- After learning about the details of the lawsuit, Toyota’s Favorability drops significantly... across all demographics.

Pre-Ballot: Which best describes your impression of Toyota as a company?

Post Ballot: Now that you have read a bit more about the Toyota’s recent activity in California, which best describes your impression of Toyota as a company? (Showing only “Extremely, Very, or Somewhat Favorable” responses. “No opinion” option not given in either pre-or-post ballot version of the question.)



- After learning about the details of the lawsuit, those who agree that Toyota is a “green and sustainable company” drops 35 percentage points to 55% from an initial 90% with all Toyota owners. (The reduction in this metric measures 27 percentage points for Republican Toyota owners and 47 percentage points for Democrat Toyota owners.)
- Initially, 78% of all Toyota owners said that they would definitely purchase another Toyota. After learning more about the lawsuit, that number drops to LESS THAN HALF of all Toyota owners (47%). (The reduction in this metric is 14 percentage points for Republican Toyota Owners and 47 percentage points for Democrat Toyota owners.)

4. Initially, only 3% of all Toyota owners said that they would choose another manufacturer for their next vehicle purchase. That number rises FOUR TIMES to 12% after learning more about the lawsuit. *(It rises SEVEN TIMES for Democrats.)*
5. Initially, 63% of all Toyota owners stated that Toyota was a leader in producing vehicles with good gas mileage. After learning more about the details of the lawsuit, that number falls 21 percentage points to 42%. *(The reduction in this metric is 10 percentage points for Republican Toyota owners and 29 percentage points for Democrat Toyota owners.)*
6. Notably, if Toyota were to reverse course and oppose the lawsuit against California, it would improve the company's consumer opinion. 72% of all Toyota owners said it would improve their opinion of the company. *(59% of Republican Toyota owners responded that it would improve their opinion of the company. And 86% of Democrat Toyota owners responded that it would improve their opinion of the company.)*