

MEMORANDUM

To: Interested Party
 Re: Key Findings from Union of Concerned Scientists March-April 2020 GM Owners Poll

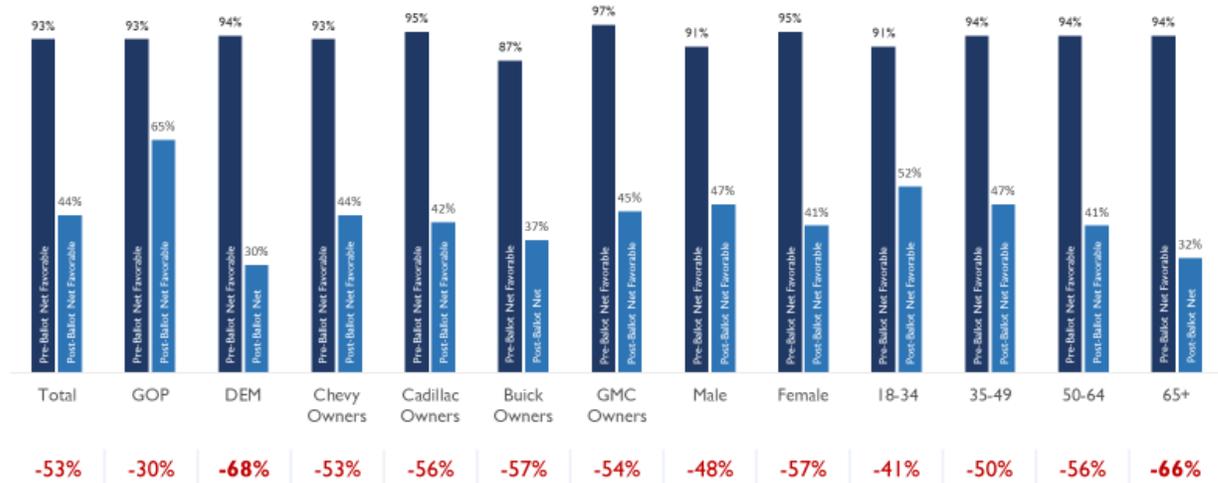
METHODOLOGY:

- Field Dates: 3/27/20 to 4/3/20
- Sample: GM 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 GM 2019 Overall Sales Data as reported by GM US.

WHAT YOU REALLY NEED TO KNOW:

- In addition to other corporate activities, GM’s lawsuit to revoke California’s and other states’ existing authority to set their own vehicle pollution standards results in the company’s favorability falling from 93% to 44% with their consumer base...a 53%-point reputational loss. *By comparison, in a similar survey, Toyota’s favorable reputation fell by only 30%.*

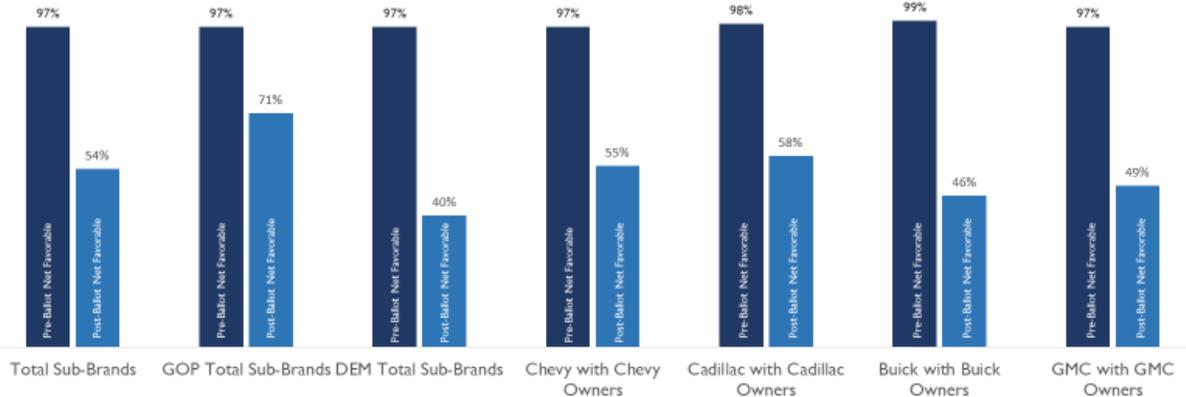
Pre-Ballot: Which best describes your impression of GM as a company?
 Post Ballot: Now that you have read a bit more about the GM’s recent activity, which best describes your impression of GM as a company?
 (Showing only “Extremely, Very, or Somewhat Favorable” responses. “No opinion” option not given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



- GM’s consumers have a higher affinity for their sub-brand of choice, Chevrolet, Cadillac, Buick, GMC than they do for the parent company, GM. That said, GM’s corporate activities do have an impact on these sub brands’ favorability with their respective consumers. 69% of all GM owners pay at least some attention to what GM does as a company, with more than a quarter (27%) stating that GM’s activities matter ‘a lot’ to their purchasing decisions.

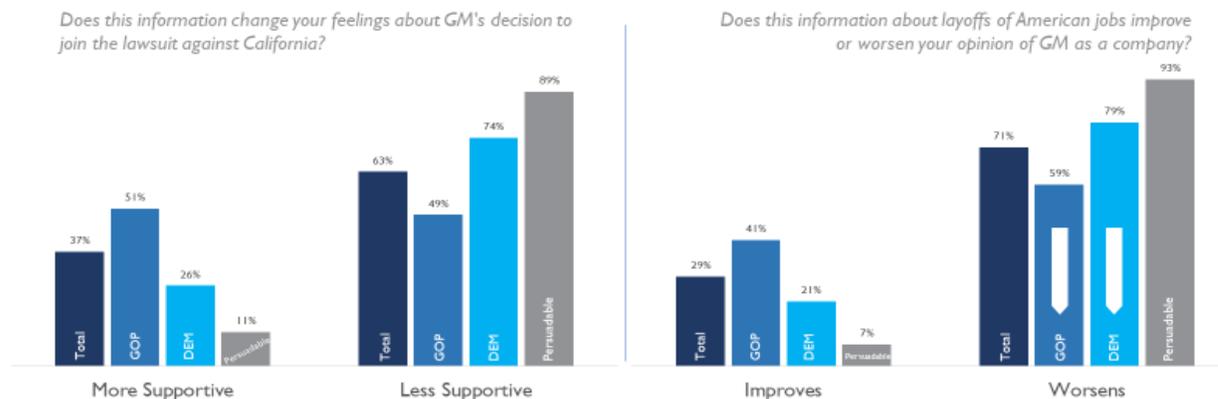
- When GM owners learn more about the corporate behavior of GM including their lawsuit, overarching consumer favorability with sub-brands (Chevrolet, Cadillac, Buick, GMC) collectively reduced from 97% to 54%... a 44% point reputational loss, with the greatest reductions in favorability coming from Buick and GMC owners.

Pre-Ballot: Which best describes your impression of [Chevrolet / Cadillac / Buick / GMC] as a sub-brand of GM?
 Post Ballot: Now that you have read a bit more about the GM's recent activity, which best describes your impression of [Chevrolet / Cadillac / Buick / GMC] as a sub-brand of GMC? (Showing only "Extremely, Very, or Somewhat Favorable" responses. "No opinion" option not given in either pre-or-post ballot version of the question. Each sub-brand's specific group represents responses JUST from those owners.)

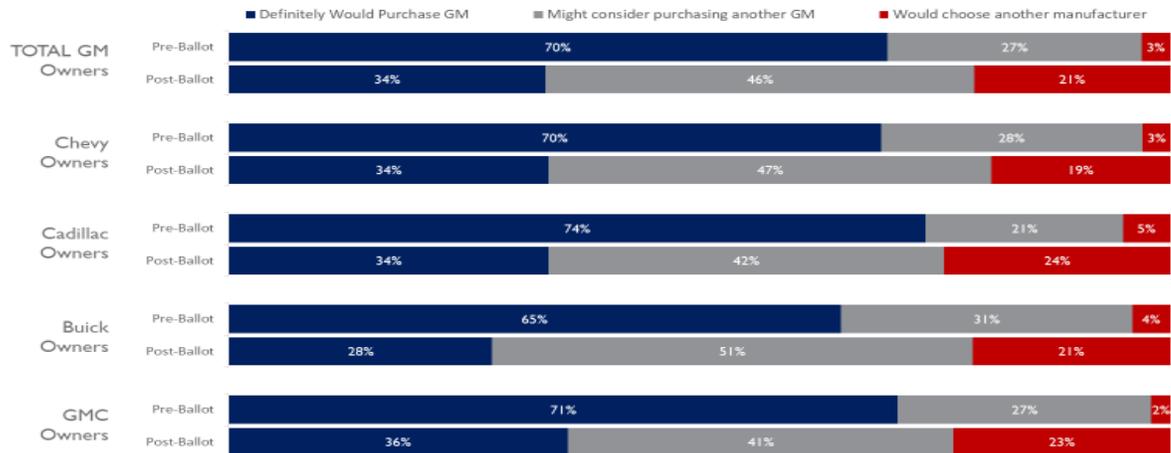


- 87% of all GM owners (compared to 81% of all Toyota owners) believe that the company should support stronger pollution standards designed to help the environment and improve gas mileage. 82% of Republicans and 93% of Democrats who own GM vehicles agree.
- 60% of all GM owners became less supportive of the company's decision to join the October 2019 lawsuit once informed that the environmental performance of their vehicle fleet ranks 3rd from last for ALL car manufacturers. (As detailed in the 2018 Automotive Trends Report, GM ranked third from the bottom in both fuel efficiency and emissions metrics from 2013 to 2018. Only Ford and Fiat Chrysler performed at lower levels.)
- 63% of GM owners became less supportive of the company's decision to join the October 2019 lawsuit when reminded that before suing to ease fuel efficiency standards, GM announced 15,000 layoffs, including an entire plant in Lordstown, Ohio, which produced the Chevy Cruze, one of GM's most fuel-efficient models. In the same quarter, GM posted a \$2.8 billion profit.

Before suing California to revoke the state's authority to set their own emissions standards, GM announced nearly 15,000 layoffs of American workers. This included an entire plant in Lordstown, Ohio which produced the Chevy Cruze, one of GM's most fuel-efficient models. In the same quarter as the layoffs, GM posted a \$2.8 billion profit.

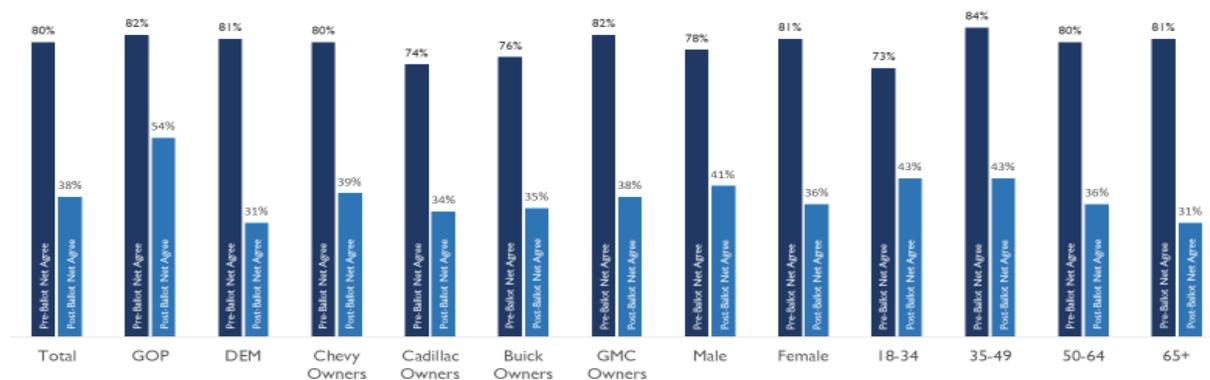


7. 65% of GM owners became less supportive of the company's decision to join the October 2019 lawsuit when informed that Forbes reports that the lawsuit against states' rights to set their own vehicle pollution standards will cost consumers roughly \$160 Billion through 2050 as projected by Energy Innovation Modeling.
8. 59% of GM owners became less supportive of the company's decision to join the October 2019 lawsuit when reminded that the lawsuit contradicts GM's commitment made to consumers during the 2008 Federal Government Bailout – in which they agreed to produce more fuel-efficient, lower-cost vehicles.
9. In our GM poll, 51% of loyal customers who initially said that they would “definitely purchase” another GM were considering another brand at the end of the poll, after learning more information about GM's corporate behavior. By comparison, that same metric was only 39% in our Toyota poll



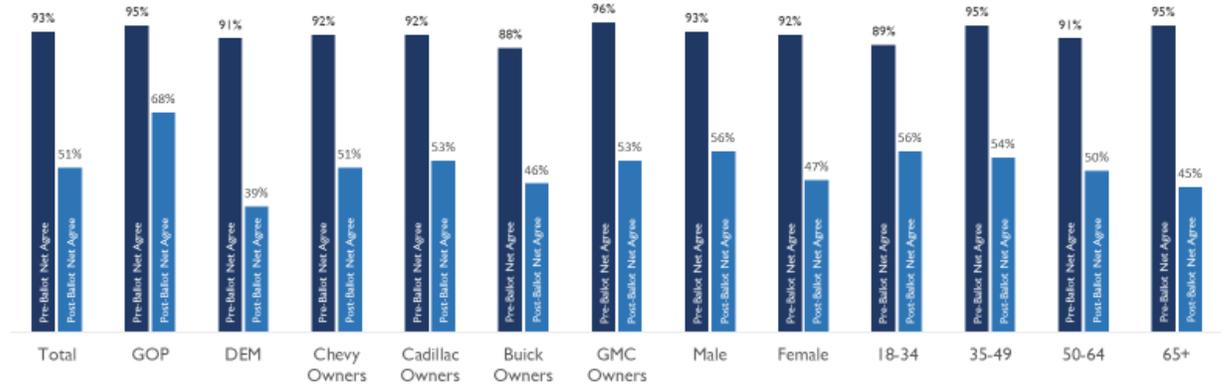
10. The number of GM owners who said that they might consider purchasing from another brand or would definitely choose another manufacturer rose from 30% at the beginning of the poll to 67% after learning more about GM's corporate behavior - more than doubling the number who would consider another brand.
11. GM's reputation with their own consumers as a “green and sustainable company” falls by 53%; from 80% initially agreeing with the statement “GM is a green and sustainable company that takes care to be environmentally friendly” to only 38% in agreement by the end of the poll. Nearly 4-in-10 indicated that GM's corporate record on environmentalism played at least some role in their purchasing decision.

Pre-and-Post Ballot: Do you agree or disagree with this statement: “GM is a green and sustainable company that takes care to be environmentally friendly.”
 (Showing only “Strongly or Somewhat Agree” responses. “No opinion” or “Neither” options not given in either the pre-or-post ballot version of this question.)



12. GM's reputation with their own consumers as an innovative company falls by 45% from 93% initially agreeing with the statement, "GM is a future-focused company that harnesses American ingenuity to develop technologies that move the auto industry forward." to only 51% in agreement by the end of the poll.

Pre-and-Post-Ballot: Do you agree or disagree with this statement: "GM is a future-focused company that harnesses American ingenuity to develop technologies that move the auto industry forward."
 (Showing only "Strongly or Somewhat Agree" responses. "No opinion" or "Neither" options not given in either the pre-or-post ballot version of this question.)



13. 76% of GM owners say that their opinion of the company would improve if GM were to reverse course and oppose the lawsuit against strong vehicle efficiency standards.

If GM were to reverse course and oppose the lawsuit against California, what impact would that have on your opinion of GM as a company?

