abacus data

Powering Up: Perceptions of Electric Vehicles

Electric Mobility Canada

NATIONAL REPORT

May 2024

Methodology

- Sample: n = 6,150 adult Canadians.
- Margin of error: ± 1.25%, 19 times out of 20.
- Online data collection (EN and FR) from May 7 to 24, 2024.
- The data was weighted by age, gender, education and region.
- Totals may not add up to 100 due to rounding.
- Throughout the report % indicates a significantly higher proportion than the % in the same segment.
- Tracking data shown in brackets, where applicable (September 2023, n=1,500) (NC = no change).
- Labels not shown on select charts where responses are 2% or less.

Key Insights

KEY INSIGHTS: INTENT TO PURCHASE (BEFORE AND AFTER INFORMATION DISSEMINTATION)

SHIFTING PREFERENCES: THE EMERGENCE OF ELECTRIC VEHICLES IN CANADA

While gas and non-plug-in hybrid vehicles remain predominant, with two-thirds of Canadians owning them, there is a notable inclination towards EVs among specific demographics. Currently, 15% of Canadians own an EV or plug-in hybrid electric vehicle (PHEV), with ownership particularly concentrated among younger individuals and urban dwellers. Moreover, over 2 in 5 Canadians express intentions to purchase an EV as their next vehicle, especially prevalent among urban residents and those in provinces like BC and Quebec, as well as those aged 30-44. This surge in interest signifies a potentially changing landscape in vehicle ownership, driven by factors such as environmental consciousness, technological advancements, and evolving consumer preferences.

PREFERENCE FOR EVs REFLECTS PRACTICAL CONSIDERATIONS IN EV ADOPTION

Among non-EV owners considering an electric vehicle (EV) purchase, a clear preference for plug-in hybrid electric vehicles (PHEVs) emerges, with 46% intending to opt for PHEVs compared to 29% for battery electric vehicles (BEVs). This preference is driven by practical considerations, as highlighted by respondents' desire for flexibility in power options and concerns about the availability of public chargers. While environmental benefits and cost savings remain primary motivators for EV adoption, the prominence of PHEVs underscores the importance of convenience and practicality in shaping consumer choices. Additionally, the significant influence of government incentives emphasizes the pivotal role of policy support in accelerating the transition towards sustainable transportation.

GROWING FAVORABILITY AND INTENTIONS TOWARDS EVS IN CANADA

The data presents a shift in Canadian attitudes towards electric vehicles (EVs), indicating a notable increase in favorability and purchase intent after receiving specific information about them. Despite initial skepticism, with only 2 in 5 Canadians (44%) noting an inclination to purchase an EV over a gas vehicle, there's a clear trend towards acceptance following the receipt of information of EVs. Particularly striking is the 14-point increase in the intent to purchase an EV after being informed about them, demonstrating the impact of knowledge dissemination. Moreover, the inclination towards EVs is especially pronounced among certain demographics, such as Quebec residents, urban dwellers, and younger age groups. This insight underscores the importance of education and awareness campaigns in promoting sustainable transportation choices and highlights the potential for continued growth in EV adoption.

KEY INSIGHTS: PERCEIVED BARRIERS TO EV ADOPTION

AFFORDABILITY CONCERNS

Most Canadians (64%) anticipate spending less than $40,000 on their next vehicle, indicating a significant sensitivity to price. While a notable portion is willing to pay a premium for an EV, with 27% ready to pay $1,001 to $3,000 more and 25% willing to pay $3,001 to $5,000 more compared to a traditional gas vehicle, the overall budget constraint remains a critical factor in EV adoption.

UPFRONT COSTS VS. MONTHLY SAVINGS

Two out of five Canadians are open to the idea of a higher upfront vehicle cost if it translates to lower monthly fees, though 45% remain undecided. This presents an opportunity to educate the undecided group about the long-term financial benefits and savings associated with higher initial costs but lower ongoing expenses, potentially making EVs more attractive.

DEALERSHIP VISITS AND PURCHASE TIMELINE

Nearly half of Canadians (49%) expect to visit 1-2 dealerships before making their next vehicle purchase, suggesting a preference for in-person exploration and comparison. Additionally, 42% of Canadians expect to wait less than one month for their vehicle after placing an order, while 32% are prepared to wait 1 to 3 months. This highlights the importance of dealership experiences and the need for efficient vehicle delivery processes.

PERCEPTIONS OF EV AVAILABILITY

Only 10% of individuals consider the availability of EVs near them as a personal barrier to purchase. However, 44% believe that while it might not be a barrier for them, it could be for others. This indicates that while direct availability is not a widespread issue, there is a perceived concern about the accessibility of EVs for the broader population, which could influence overall market growth.

KEY INSIGHTS: KNOWLEDGE GAPS ARE PERSISTENT

LIMITED AWARENESS OF INCENTIVES AND COSTS

A significant portion of Canadians are largely unaware of the incentives and financial benefits associated with EVs. Most do not know about federal and provincial government rebates, and only 27% are aware of the federal tax deduction for EV purchases for the self-employed or business owners—a slight increase from August 2023. Additionally, nearly half are unfamiliar with other available incentives, only 12% know the average price of a new light-duty vehicle in Canada, and just 8% are aware that there are over 40 EV models available below this average price. This gap in knowledge highlights the need for better dissemination of information to encourage EV adoption.

PERCEPTION OF TOTAL OWNERSHIP COSTS

Despite the lack of awareness about specific incentives, more than half of Canadians (56%) believe that the total cost of owning an EV will be cheaper than owning a gas vehicle, with 22% expecting it to be "much cheaper." This perception aligns with the fact that 55% of Canadians think it is less expensive to recharge an EV at home compared to filling up a gas vehicle. However, only a quarter are aware of the specific cost range to drive an EV 100 km (50 cents - $4.00), suggesting that while the general sentiment is positive, specific knowledge about cost savings is lacking.

CONCERNS AND MISCONCEPTIONS ABOUT EV AVAILABILITY AND RANGE

There are mixed feelings about the availability and reliability of EVs. While 37% of Canadians express no concern about the availability of EVs compared to gas vehicles, 39% have varying levels of concern. Additionally, the majority are unaware of the average range of new EVs, with only 25% knowing that it falls between 400 and 500 kilometers. Confidence in the reliability of EVs is also an issue, with 46% expressing less confidence in their reliability compared to gas vehicles, although there has been a slight increase in confidence since August 2023.

CHARGING INFRASTRUCTURE AWARENESS

Awareness of charging infrastructure and its capabilities is somewhat limited among Canadians. While 40% know that most new EVs can charge from 20% to 80% in 15 to 45 minutes, this still leaves a significant portion of the population uninformed. Furthermore, although nearly two in five Canadians (38%) are willing to wait less than a month for an EV/PHEV after purchase, and 33% are willing to wait 1-3 months, this indicates an openness to EVs that could be better supported with more robust education on charging times and infrastructure availability.

KEY INSIGHTS: ELECTRIC VEHICLE OWNERSHIP

KEY MOTIVATIONS FOR EV PURCHASES

The results revealed that 15% of Canadians own an EV or PHEV, with higher ownership among younger and urban populations. Cost savings (60%) and environmental benefits (50%) are the primary motivations for purchasing EVs. This trend continues among those planning to buy or lease another EV, with 55% prioritizing cost savings and 46% focusing on environmental benefits. Efficiency is also important for one in three potential repeat buyers. Additionally, nearly two-thirds of EV owners acknowledge the significant influence of government incentives on their purchase decisions.

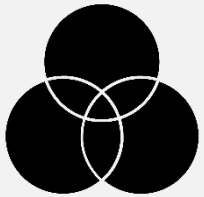
BARRIERS AND CHALLENGES TO EV ADOPTION

Overall, 71% of EV owners report no negative experiences in the past year, yet 23% do encounter issues. For those facing difficulties, limited access to public charging infrastructure (58%) and range anxiety (43%) are the predominant problems. Among current EV owners, 9% note that their next vehicle purchase/lease will be gasoline or diesel. This is important to note as it suggests that there are barriers that deter some Canadians from purchasing another EV. Among those hesitant to make another EV purchase, 47% note that EVs are too expensive, and 36% cite the lack of home charging options as a major concern. Additionally,

CHARGING INFRASTRUCTURE

When it comes to charging infrastructure, over three-quarters of EV/PHEV owners have access to a home charging station. However, for those without home charging facilities (23% of EV owners), the main obstacles are the cost (61%), lack of parking space (34%), and property type restrictions (28%). Additionally, charging habits indicate that 51% of Canadians do not need to charge their vehicles at work, while 49% choose to charge their vehicle while at work. When considering public charging infrastructure, 41% of EV/PHEV owners have used fast charger stations at least 3-5 times, while 36% have used public Level 2 (L2) chargers with the same frequency in the last 12 months.

KEY INSIGHTS: VEHICLE USAGE



ANNUAL DRIVING DISTANCES AND TRAVEL PATTERNS

Most Canadians drive 10,000 km or less annually, with 54% reporting this range. However, EV owners tend to drive more, with 38% driving between 10,000 and 20,000 km, compared to 27% of non-EV owners. This indicates that EV owners might be more frequent travelers or use their vehicles more extensively. Additionally, Canadians typically take 1-2 long trips (500 km or more) annually (47%), but EV owners are significantly more likely to take 3 or more such trips (45%) compared to non-EV owners (24%). This suggests that EV owners may have more confidence in their vehicles' range and reliability for longer distances.

REFUELING AND BREAK PATTERNS

Three out of five Canadians stop for breaks and refueling every one to two hours, a behavior more common among EV owners (71%) compared to non-EV owners (58%). When it comes to refueling, half of Canadians spend 1-5 minutes, while 40% spend 5-10 minutes. Despite the quick refueling times for gas vehicles, EV owners show a greater willingness to deviate from their ideal route to find charging stations, with 55% willing to travel 5-10 minutes and 13% willing to travel 20+ minutes. This flexibility highlights the growing adaptability of EV users to current charging infrastructure.

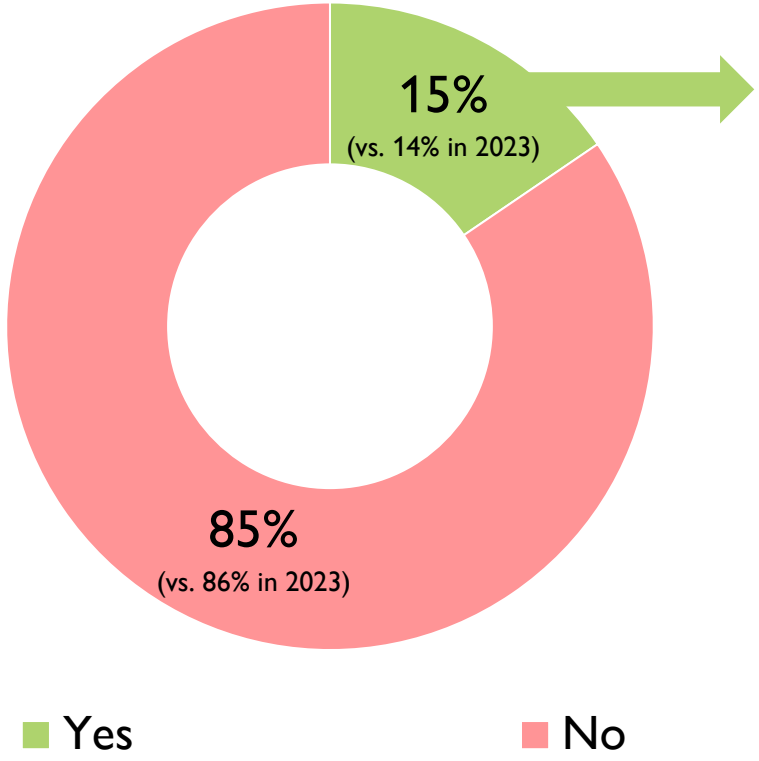
COMMUTE AND FUEL CONVENIENCE PREFERENCES

When looking for fuel, half of Canadians are willing to travel 1-5 minutes off their ideal route. However, EV owners demonstrate a higher willingness to go out of their way for charging, with 55% traveling 5-10 minutes and 13% going 20+ minutes out of their way. Additionally, while 29% of Canadians are willing to pay more for gas at a convenient location, younger Canadians show a higher propensity to pay a premium compared to those aged 45 and older. This indicates a trend towards valuing convenience and accessibility, especially among the younger demographic.

Vehicle Ownership

Do you own an electric vehicle or plug-in hybrid vehicle?

Currently, 15% of Canadians own an EV or PHEV, with ownership particularly high among younger Canadians and those in urban areas.

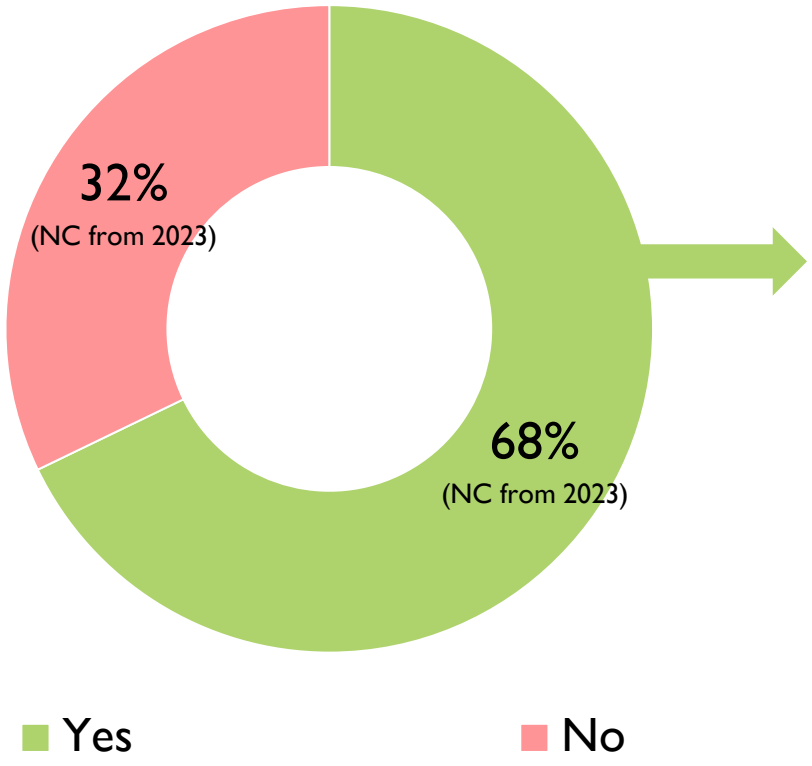


Region							Type of Community			Age			
BC	AB	SK/MB	ON	QC	ATL	NORTH	Urban	Suburban	Rural	18-29	30-44	45-59	60+
18%	12%	9%	17%	16%	9%	30%	18%	14%	10%	27%	23%	11%	5%

Base n = 6150

Do you own a gas or non-plug-in hybrid vehicle?

Conversely, two-thirds of Canadians own a gas / non-plug-in hybrid vehicle.

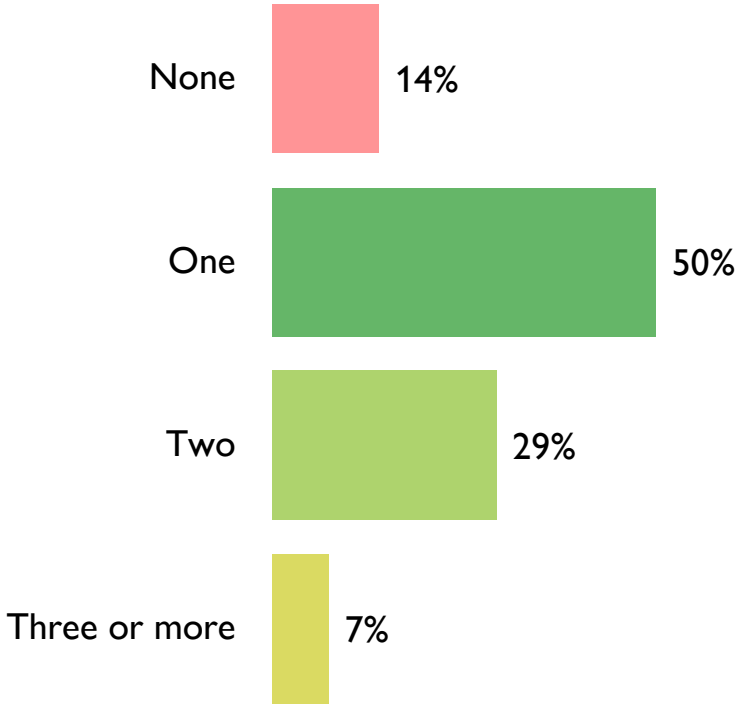


Region							Type of Community		
BC	AB	SK/MB	ON	QC	ATL	NORTH	Urban	Suburban	Rural
68%	72%	70%	65%	69%	70%	69%	65%	70%	73%

Base n = 6150

How many cars or light trucks are present in your household?

Most Canadians have one vehicle in their household (50%), while 35% report having 2+ vehicles.

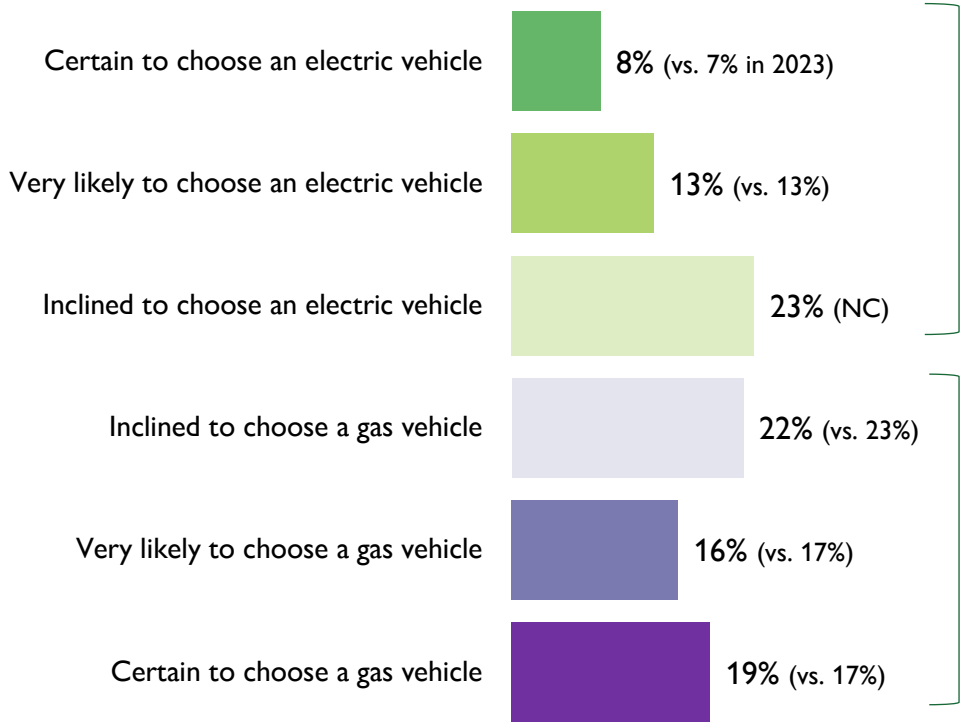


# of Cars/ Light Trucks	EV Owner		Region							Type of Community			Age			
	Yes	No	BC	AB	SK/MB	ON	QC	ATL	NORTH	Urban	Suburban	Rural	18-29	30-44	45-59	60+
None	3%	16%	13%	8%	11%	16%	15%	12%	8%	17%	12%	9%	16%	14%	15%	11%
1	36%	52%	52%	49%	47%	51%	48%	51%	43%	53%	48%	43%	39%	48%	49%	60%
2	51%	25%	24%	32%	31%	29%	30%	29%	26%	26%	31%	34%	32%	32%	30%	24%
3+	10%	7%	11%	11%	10%	5%	6%	8%	22%	5%	9%	13%	14%	6%	6%	5%

Base n = 6150

When thinking about your next vehicle purchase, which will you choose?

Over 2 in 5 Canadians (44%) plan to buy an EV as their next vehicle. This preference is higher among urban residents (49%), those in BC (50%) and Quebec (51%), and individuals aged 30-44 (51%).



44% (vs. 43%) Electric

Region							Type of Community			Age			
BC	AB	SK/MB	ON	QC	ATL	NORTH	Urban	Suburban	Rural	18-29	30-44	45-59	60+
50%	34%	35%	45%	51%	34%	29%	49%	44%	31%	47%	51%	44%	38%

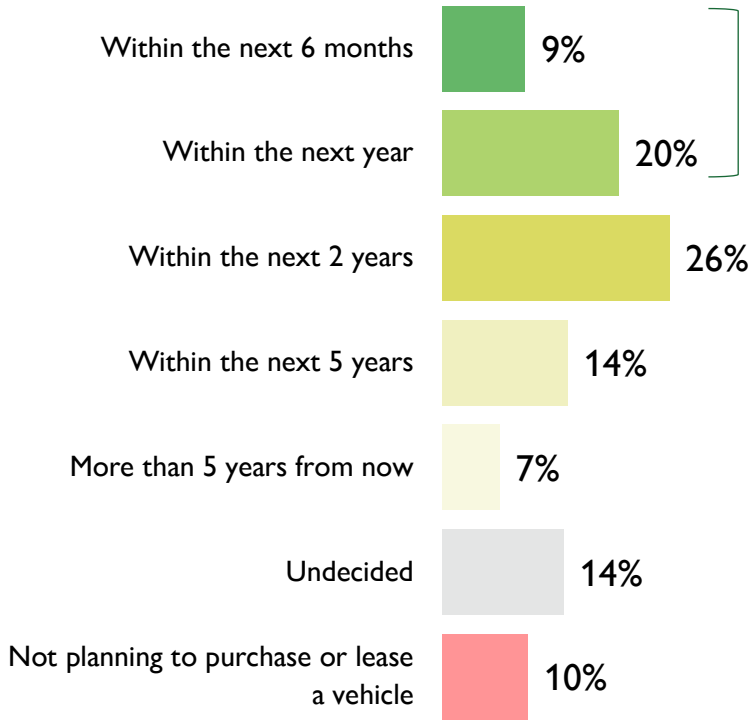
57% (NC) Gas

Region							Type of Community			Age			
BC	AB	SK/MB	ON	QC	ATL	NORTH	Urban	Suburban	Rural	18-29	30-44	45-59	60+
50%	66%	65%	55%	49%	66%	71%	51%	56%	69%	53%	49%	56%	62%

Base n = 5336; those who do not own an EV or PHEV

When, if at all, do you plan to purchase or lease your next vehicle? Please select one option

1 in 3 Canadians intend to purchase a new vehicle within the next year (30%).



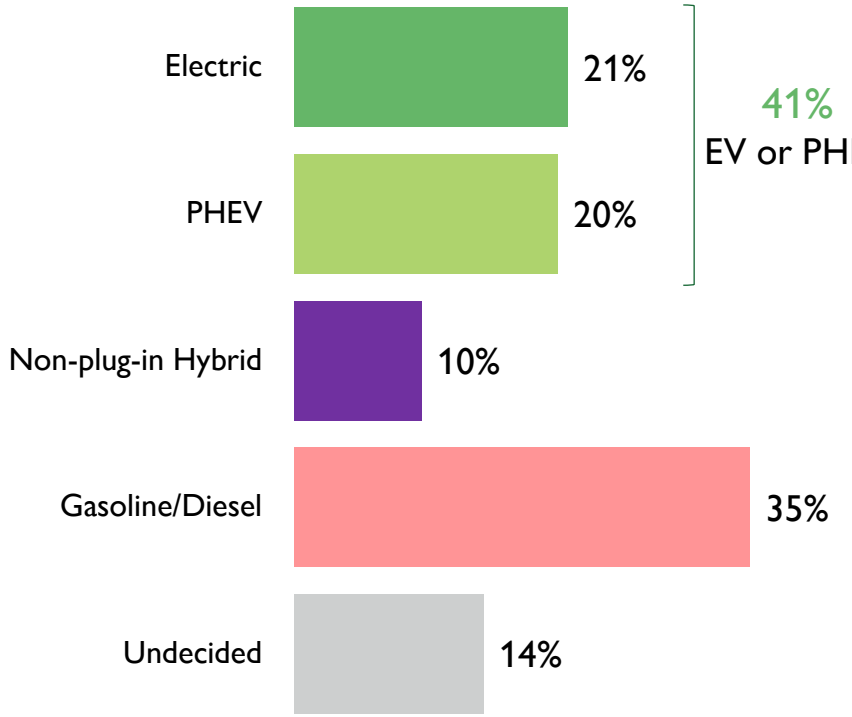
30% within the next year

EV Owner		Region							Type of Community			Age			
Yes	No	BC	AB	SK/MB	ON	QC	ATL	NORTH	Urban	Suburban	Rural	18-29	30-44	45-59	60+
49%	26%	27%	31%	28%	33%	25%	27%	15%	33%	28%	24%	34%	41%	27%	19%

Base n = 6150

What type of vehicle do you intend to purchase or lease next?

Among those who intend to purchase a new vehicle, 41% intend to purchase an EV / PHEV, while 35% plan to purchase a gas/diesel vehicle.



EV Owner		Region							Type of Community			Age			
Yes	No	BC	AB	SK/MB	ON	QC	ATL	NORTH	Urban	Suburban	Rural	18-29	30-44	45-59	60+
76%	34%	48%	31%	31%	41%	50%	28%	43%	45%	41%	28%	47%	50%	37%	33%

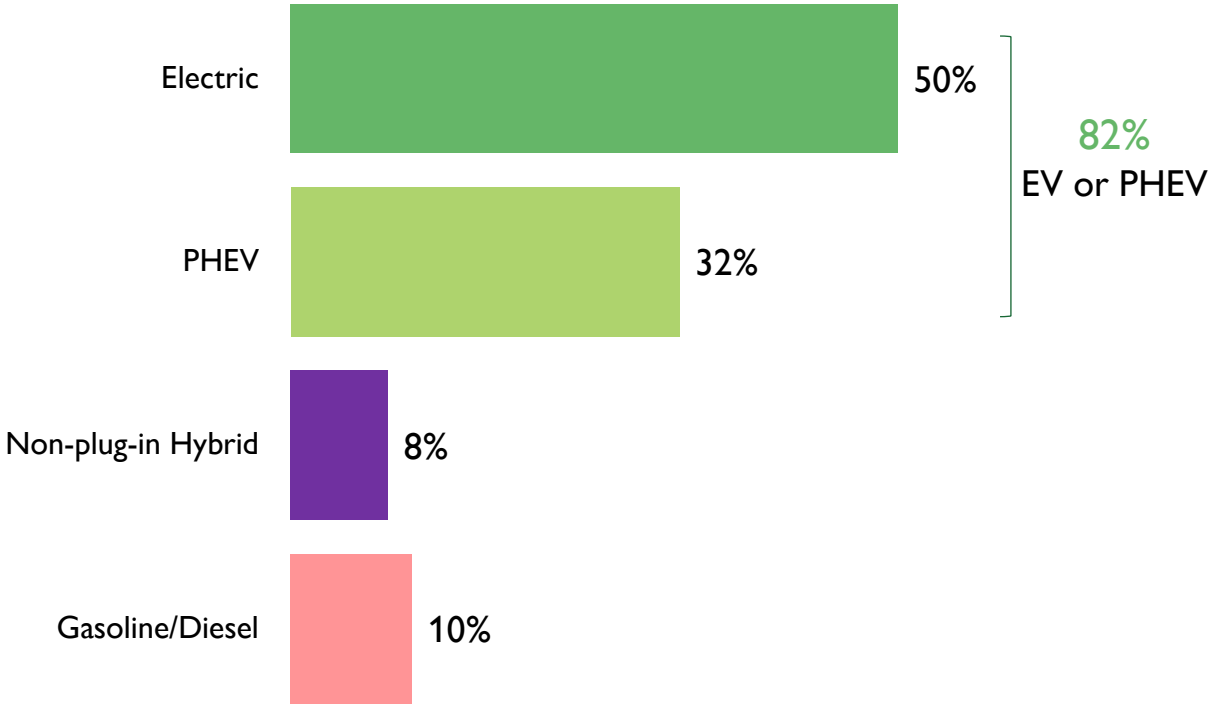
EV Owner		Region							Type of Community			Age			
Yes	No	BC	AB	SK/MB	ON	QC	ATL	NORTH	Urban	Suburban	Rural	18-29	30-44	45-59	60+
9%	40%	29%	46%	45%	34%	28%	44%	26%	32%	33%	49%	31%	31%	38%	39%

Base n = 5567; those who plan to purchase or lease a vehicle at some point

What type of vehicle do you intend to purchase or lease next?

Among current EV owners who know what type of vehicle they will purchase next, 82% note that they would buy an EV/PHEV, with only 10% indicating that they would purchase a gas vehicle.

AMONG CURRENT EV OWNERS

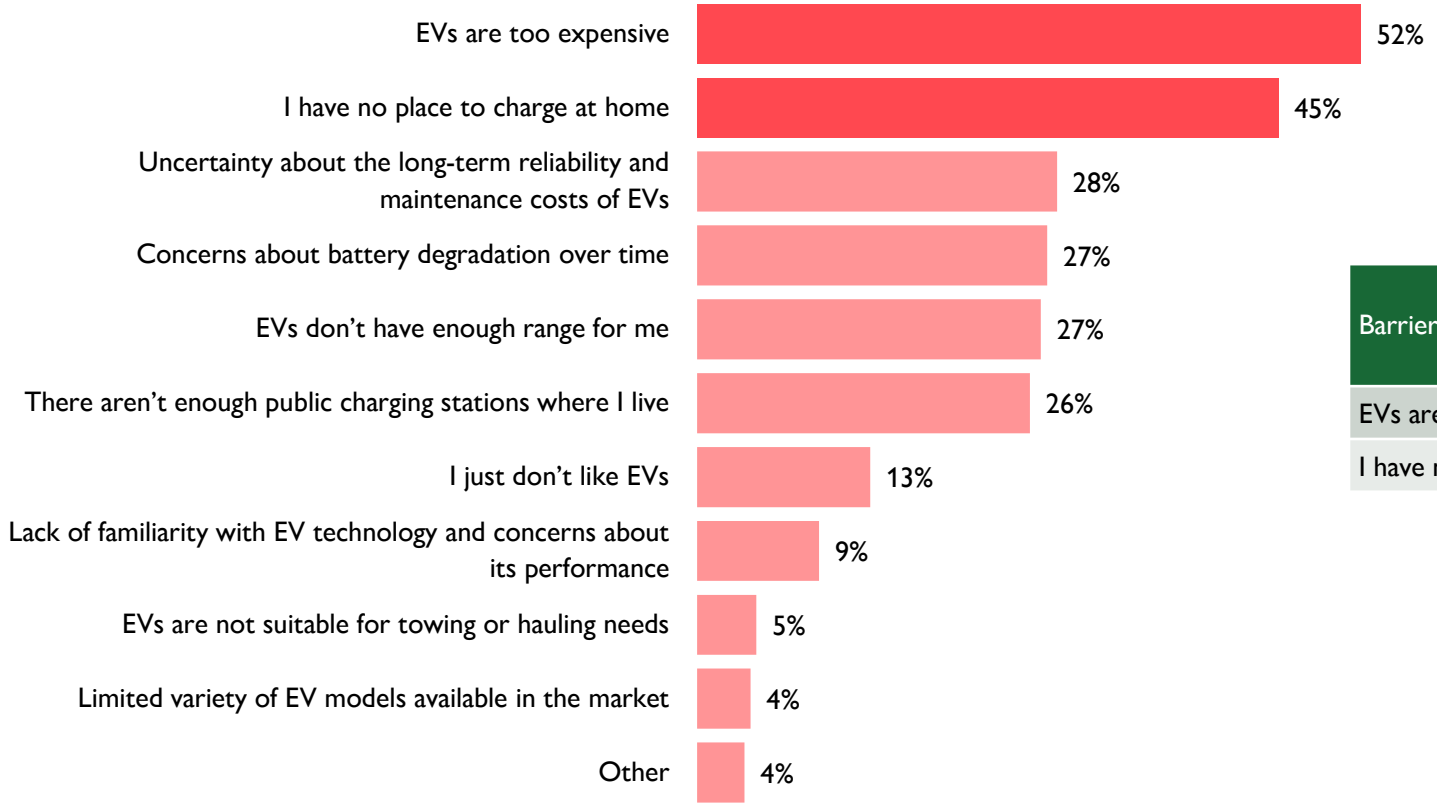


Region							Type of Community			Age			
BC	AB	SK/MB	ON	QC	ATL	NORTH	Urban	Suburban	Rural	18-29	30-44	45-59	60+
82%	73%	73%	82%	89%	80%	87%	83%	84%	71%	78%	85%	84%	83%

Base n = 732; current EV owners who plan to purchase or lease a vehicle at some point; excludes those who are undecided

What would prevent you from selecting an electric or plug-in hybrid vehicle as your next car? Please select up to 3 reasons

For those planning to buy a gas or diesel vehicle, the main barriers to choosing an EV or PHEV instead are the cost (52%) and the lack of home charging options (45%).

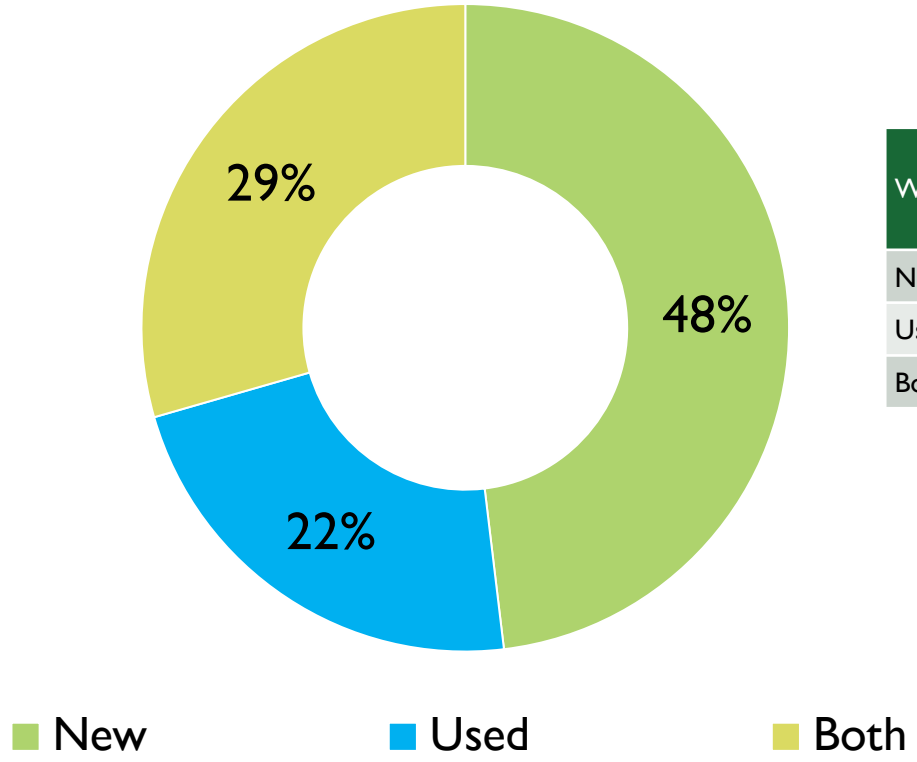


Barriers to Choosing an EV/PHEV	Type of Community			Age			
	Urban	Suburban	Rural	18-29	30-44	45-59	60+
EVs are too expensive	50%	51%	54%	41%	45%	55%	58%
I have no place to charge at home	49%	42%	40%	48%	44%	44%	46%

Base n = 2661; those who plan to purchase or lease a non-PHEV or a gasoline/diesel for their next vehicle

When purchasing your next vehicle, what type of vehicle will you consider?

3 in 4 Canadians note that they will consider purchasing a new vehicle (77%).



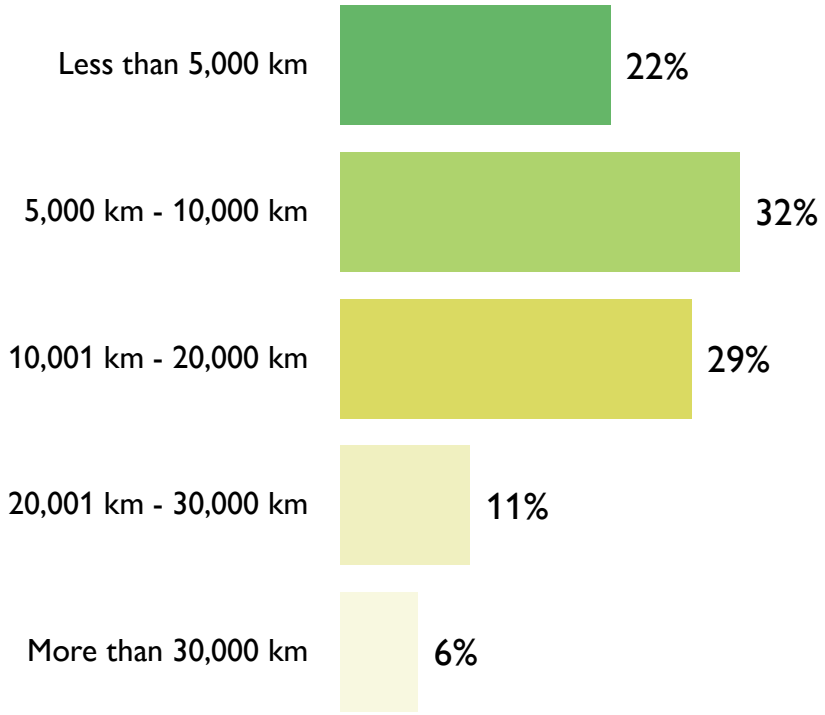
Would consider…	EV Owner		Region							Type of Community		
	Yes	No	BC	AB	SK/MB	ON	QC	ATL	NORTH	Urban	Suburban	Rural
New	67%	45%	43%	40%	34%	52%	52%	48%	49%	51%	48%	38%
Used	15%	24%	24%	26%	28%	19%	25%	20%	19%	21%	21%	29%
Both	18%	31%	33%	34%	38%	29%	23%	32%	32%	27%	31%	33%

Base n = 6150

Current Vehicle Usage

How many km do you drive in a year?

Most Canadians (54%) drive 10,000 km or less on average annually. EV owners are more inclined to drive between 10,000 and 20,000 km (38%) compared to non-EV owners (27%).

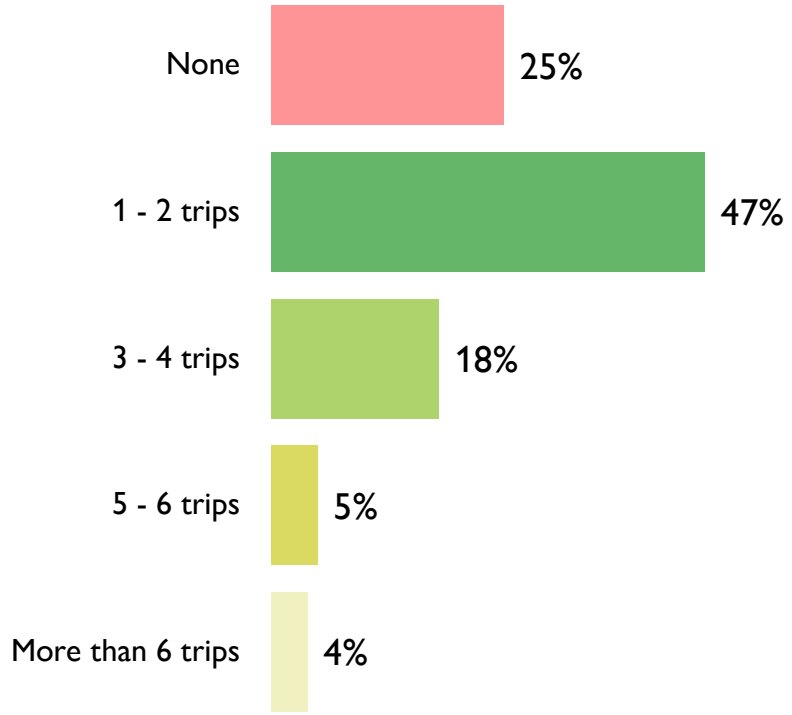


KMs in a year	EV Owner		Region						
	Yes	No	BC	AB	SK/MB	ON	QC	ATL	NORTH
Less than 5,000	8%	25%	26%	18%	21%	23%	21%	19%	15%
5,000 to 10,000	32%	33%	37%	33%	32%	31%	32%	32%	26%
10,001 to 20,000	38%	27%	25%	31%	27%	27%	32%	29%	34%
20,001 to 30,000	13%	10%	7%	11%	12%	11%	10%	13%	15%
More than 30,000	9%	6%	6%	8%	7%	7%	5%	6%	10%

Base n = 6150

How many long distance (500 km or more) trips do you make in one year?

On average, Canadians take 1-2 trips of 500 km or more per year (47%). However, EV owners are notably more inclined to take 3 or more such trips annually (45%) compared to non-EV owners (24%).

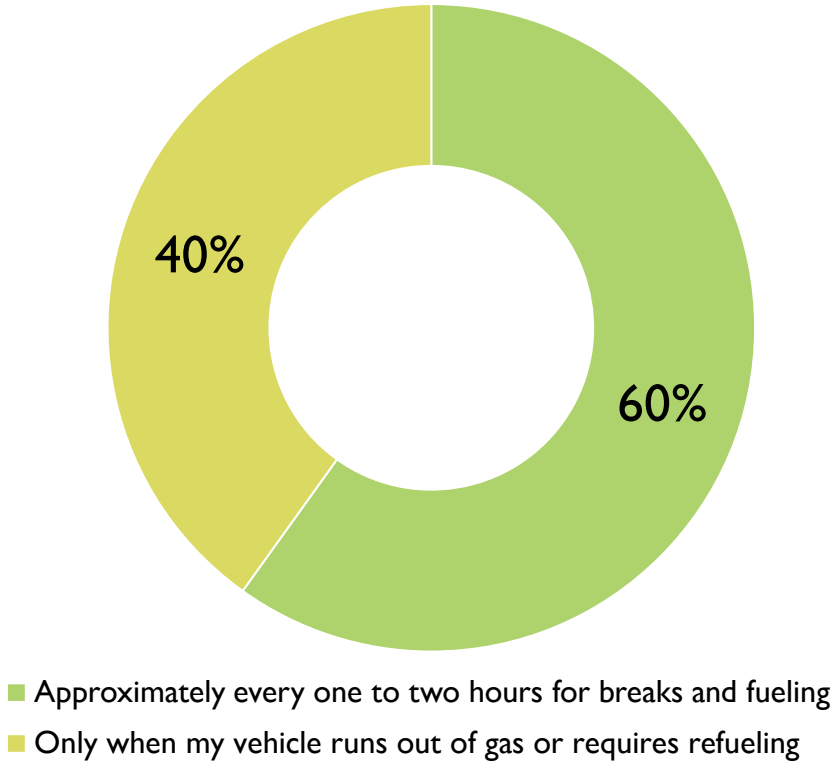


Long-distance trips in a year	EV Owner		Region							Age			
	Yes	No	BC	AB	SK/MB	ON	QC	ATL	NORTH	18-29	30-44	45-59	60+
None	8%	29%	28%	21%	22%	25%	29%	22%	15%	16%	18%	25%	38%
1 to 2 trips	48%	47%	49%	45%	47%	47%	49%	45%	43%	50%	49%	49%	43%
3 to 4 trips	30%	16%	16%	22%	22%	18%	15%	21%	21%	24%	22%	16%	13%
5 to 6 trips	9%	4%	4%	6%	6%	5%	4%	7%	9%	6%	6%	6%	3%
More than 6 trips	6%	4%	2%	6%	4%	4%	3%	5%	12%	4%	5%	4%	2%

Base n = 6150

How frequently do you typically make stops during long-distance trips (500 km or more)?

Three out of five Canadians stop every one to two hours for breaks and refueling while driving. This tendency is especially pronounced among EV owners (71%) compared to non-EV owners (58%).

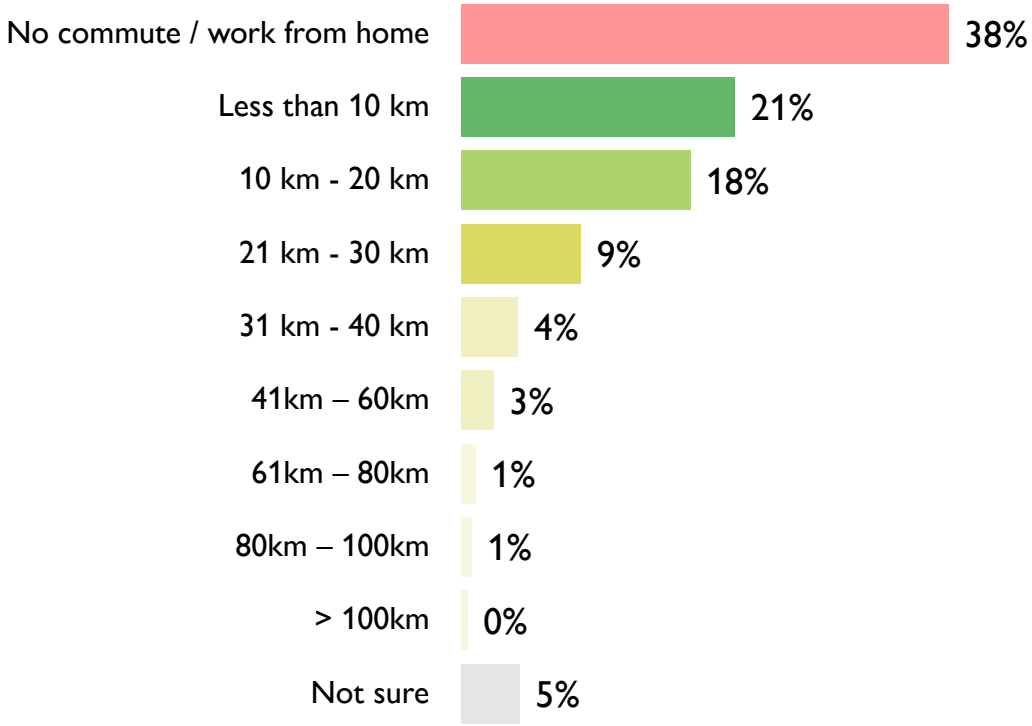


Frequency of stops	EV Owner		Type of Community			Age			
	Yes	No	Urban	Suburban	Rural	18-29	30-44	45-59	60+
Every 1 to 2 hours	71%	58%	62%	59%	55%	61%	65%	58%	56%
When vehicle needs fuel	29%	42%	38%	41%	45%	39%	35%	42%	44%

Base n = 6150

How far do you drive to get to work?

1 in 3 Canadians note that they do not have a commute (38%), while 21% drive less than 10km to work.

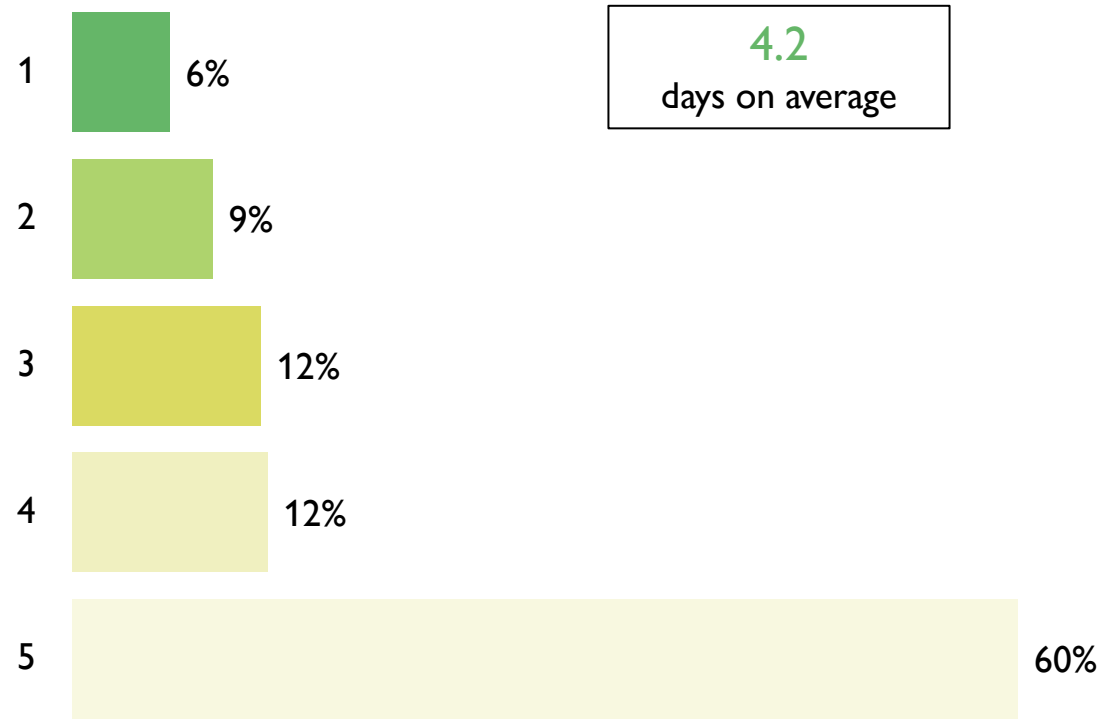


Commute distance	EV Owner		Age			
	Yes	No	18-29	30-44	45-59	60+
No commute/work from home	14%	42%	17%	24%	33%	70%
Less than 10 km	21%	21%	28%	24%	23%	13%
10 to 20 km	27%	16%	27%	22%	19%	6%
21 to 30 km	16%	8%	12%	13%	10%	4%

Base n = 6150

How many days a week do you need to commute to a work location?

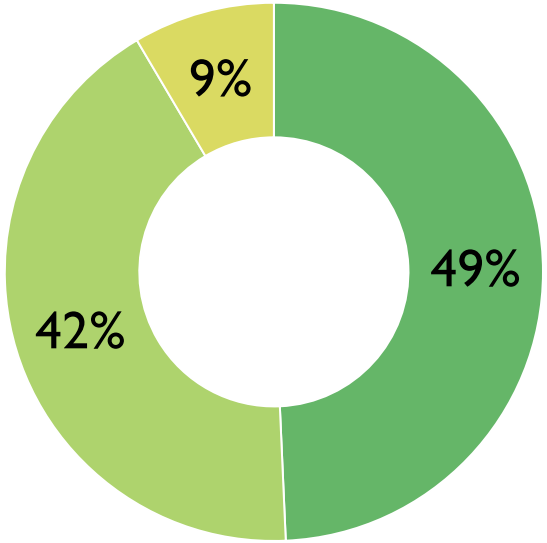
Among those who do commute, 60% note that they commute 5 days a week.



Base n = 3707; those who commute

When you stop for gas (or when you previously did), how far off your ideal route are you willing to travel to find fuel?

Half of Canadians are willing to travel 1-5 minutes off their ideal route to find fuel. However, EV owners are notably more willing to deviate from their ideal route compared to non-EV owners, with 55% willing to travel 5-10 minutes and 13% willing to travel 20+ minutes.

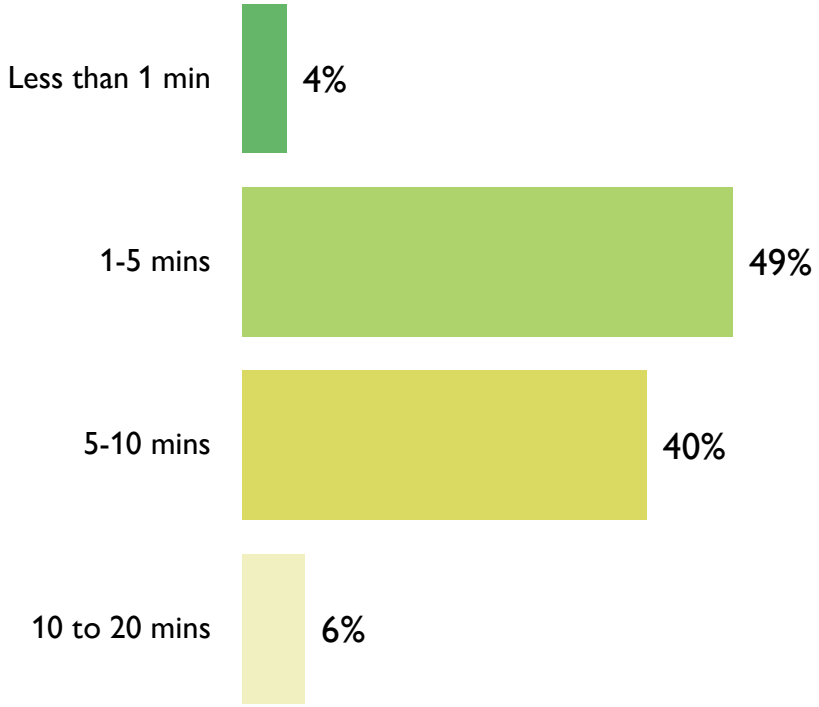


Willing to travel…	EV Owner		Region							Type of Community			Age			
	Yes	No	BC	AB	SK/MB	ON	QC	ATL	NORTH	Urban	Suburban	Rural	18-29	30-44	45-59	60+
1-5 minutes	32%	52%	53%	55%	54%	46%	46%	54%	52%	46%	52%	56%	40%	43%	54%	57%
5-10 minutes	55%	40%	40%	37%	41%	45%	43%	40%	30%	46%	40%	35%	50%	48%	39%	35%
20+ minutes	13%	8%	7%	8%	6%	9%	11%	6%	18%	9%	8%	9%	10%	10%	7%	8%

Base n = 6150

How long do you (or did you in the past) typically spend at a gas station when you need to refuel?

1 in 2 Canadians spend 1 to 5 minutes when refueling, with 2 in 5 spending 5-10 minutes.

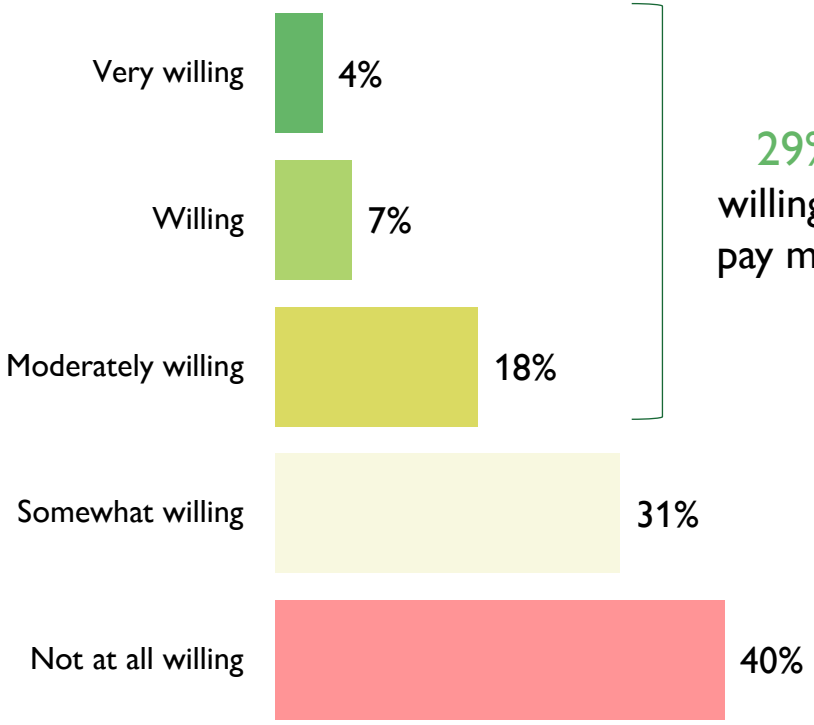


Time spent at gas station	Region						
	BC	AB	SK/MB	ON	QC	ATL	NORTH
5 minutes or less	56%	47%	49%	51%	61%	51%	51%
5 to 10 minutes	38%	45%	45%	42%	34%	43%	39%
10 to 20 minutes	6%	8%	5%	7%	5%	5%	10%

Base n = 6150

Would you be willing to pay more for gas if a gas station was at a convenient location (i.e., you did not need to drive out of your way)?

29% of Canadians would be willing to pay more for gas if it was at a convenient location, while 40% would not be willing to pay the premium for convenience. Younger Canadians are significantly more likely to be willing to pay a premium than those who are 45+.



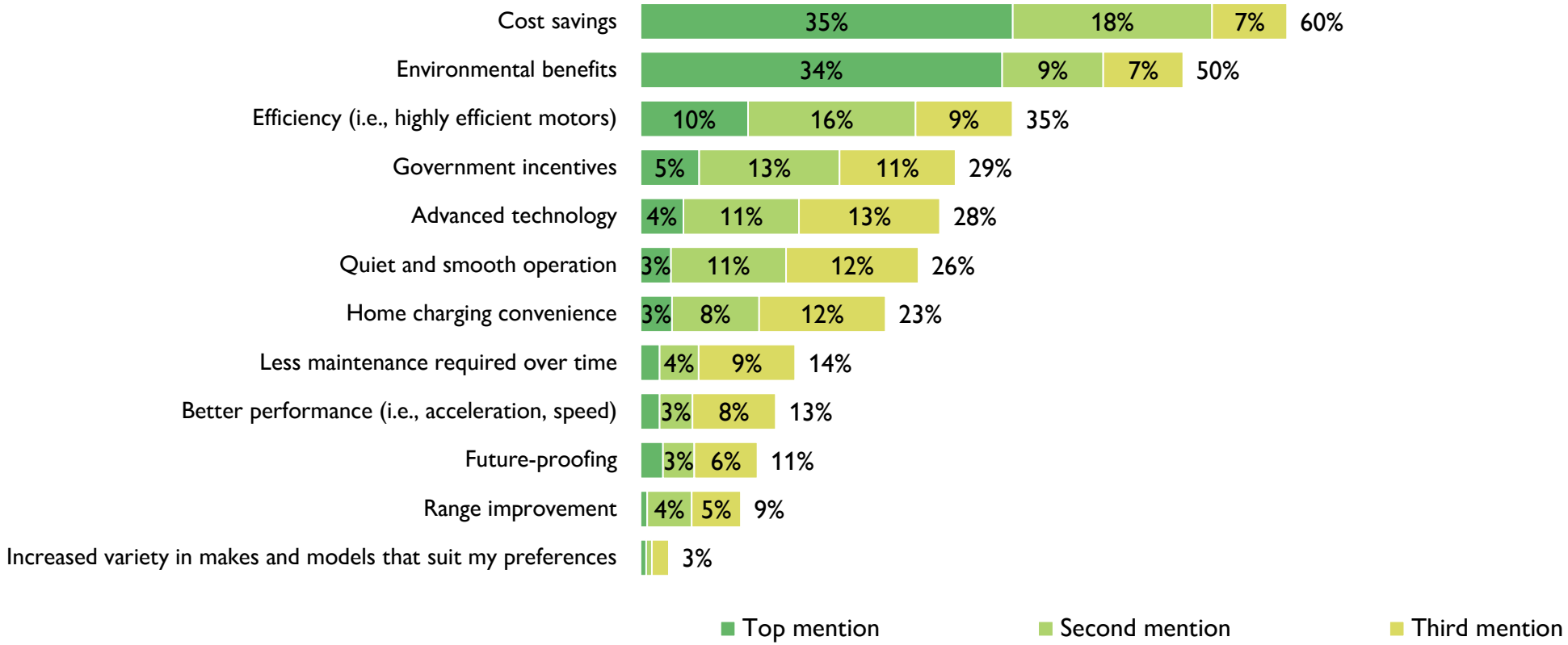
EV Owner		Type of Community			Age			
Yes	No	Urban	Suburban	Rural	18-29	30-44	45-59	60+
47%	26%	32%	26%	25%	42%	35%	24%	19%

Base n = 6150

Current EV Owners

Why did you purchase an EV or PHEV? Please rank the top 3 reasons

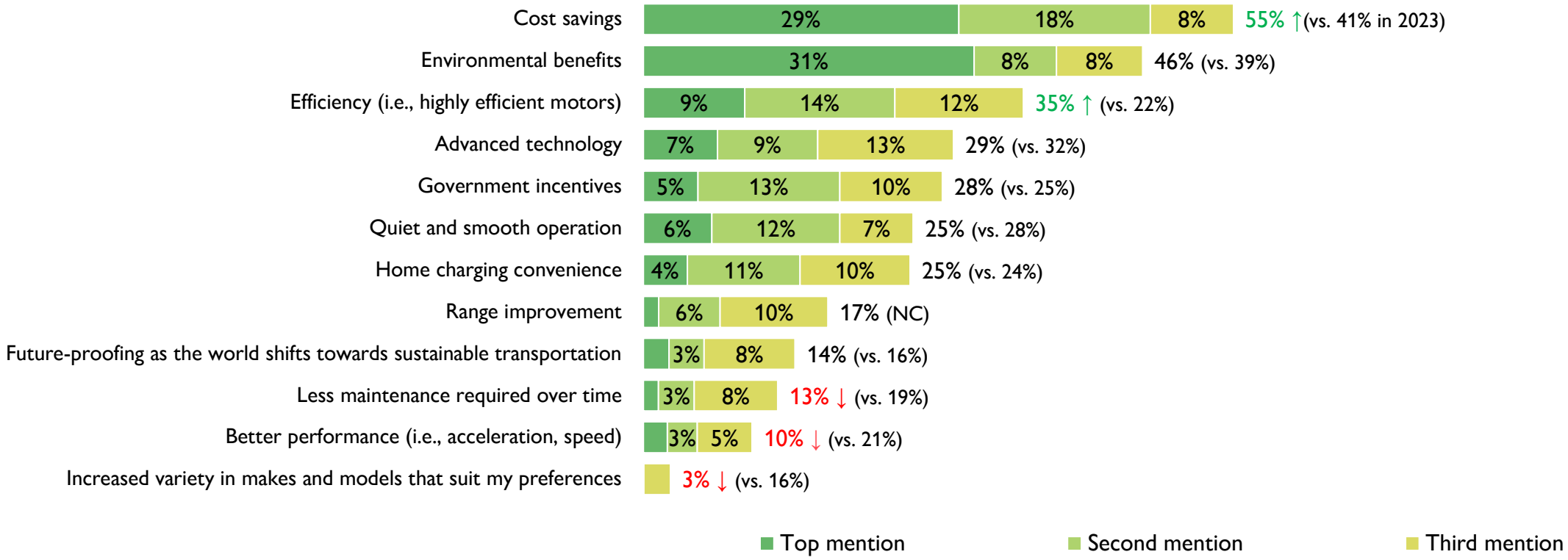
For EV owners, the primary motivations for purchasing their vehicles were cost savings (60%) and environmental benefits (50%).



Base n = 814
Total percentage (right of row) shows % who mentioned this within their top 3.

What are the main reasons that you would consider purchasing/leasing an electric vehicle again? Please rank the top 3 reasons

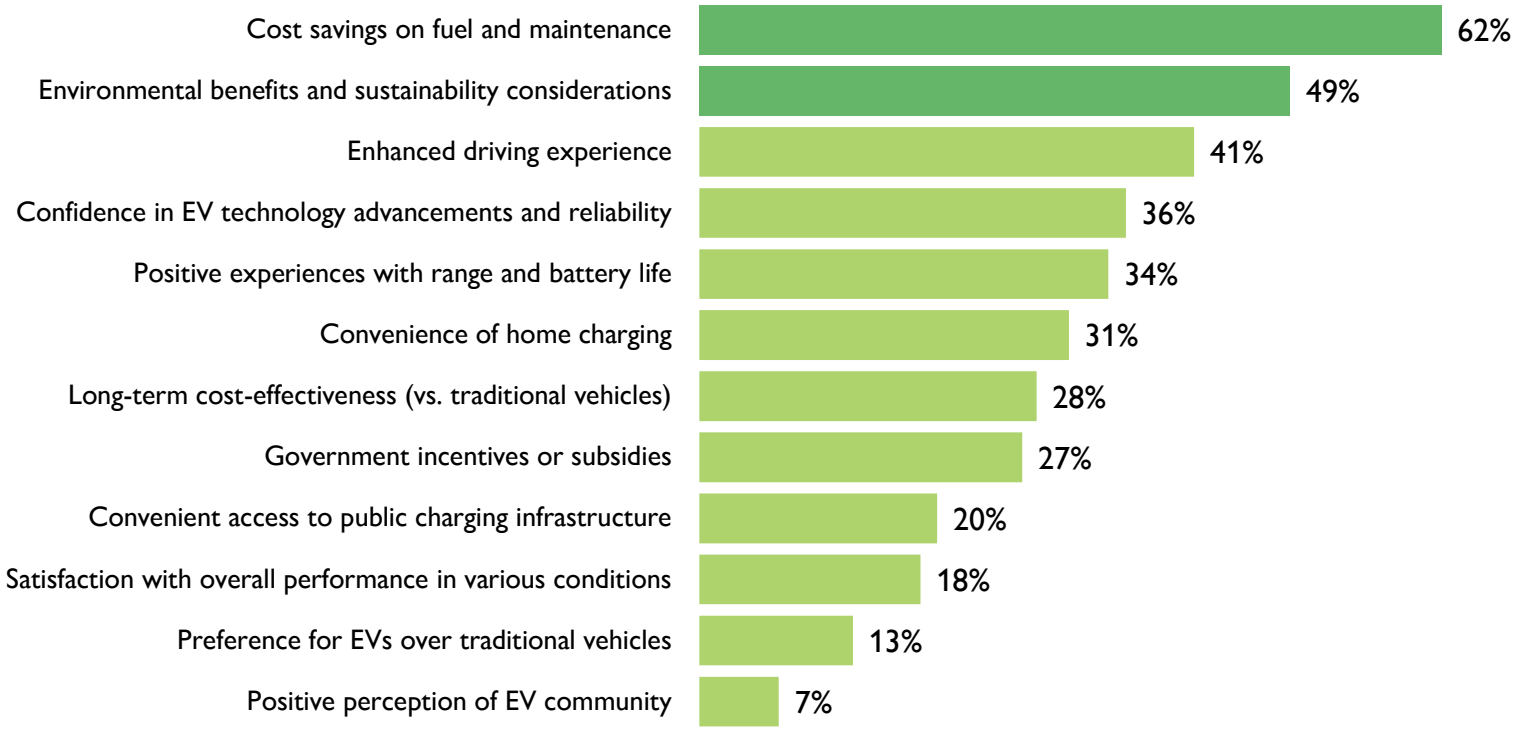
Similar to their initial purchase, EV owners cite cost savings (55%) and environmental benefits (46%) as the main reasons for buying another EV. Additionally, one in three Canadians noted efficiency as a significant factor.



Base n = 605; those who own an EV or PHEV now and intend to purchase one again for their next vehicle
Total percentage (right of row) shows % who mentioned this within their top 3.

What are the main reasons motivating you to consider purchasing another electric vehicle (EV) in the future, given that you already own one? Please select all that apply from the following list

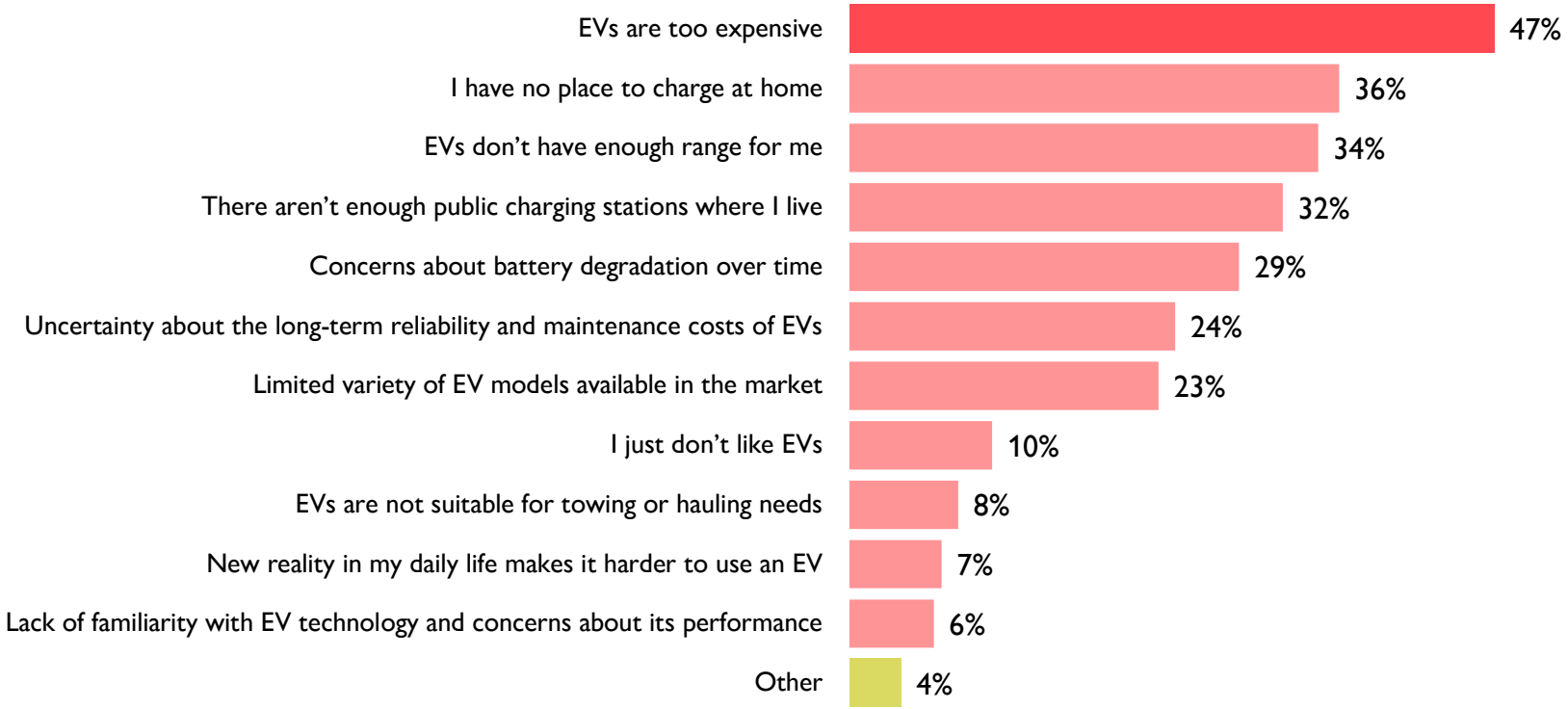
For current EV owners, the top motivators for considering another EV in the future are cost savings (62%), environmental benefits (49%), and an enhanced driving experience (41%).



Base n = 605; those who own an EV or PHEV now and intend to purchase one again for their next vehicle

What factors contribute to your decision not to repurchase/lease an electric vehicle (EV) in the future, despite currently owning one? Please select all that apply from the following list

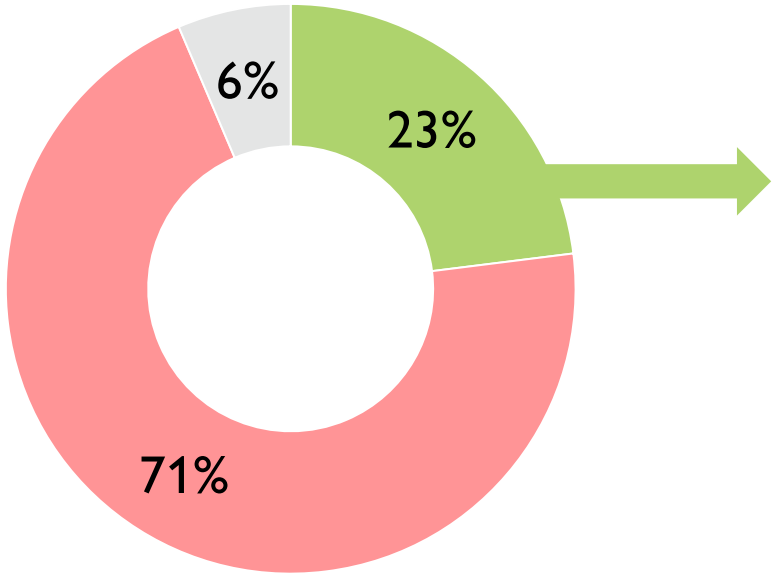
Among those who wouldn't purchase another EV in the future, 47% say EVs are too expensive, and 36% cite the lack of home charging options.



Base n = 127; those who own an EV or PHEV now and do not intend to purchase one again for their next vehicle

Have you encountered any negative experiences with your current EV in the last year? This can include with the vehicle itself or with charging

Most EV owners (71%) have not had a negative experience in the past year, while 1 in 4 note that they have (23%).



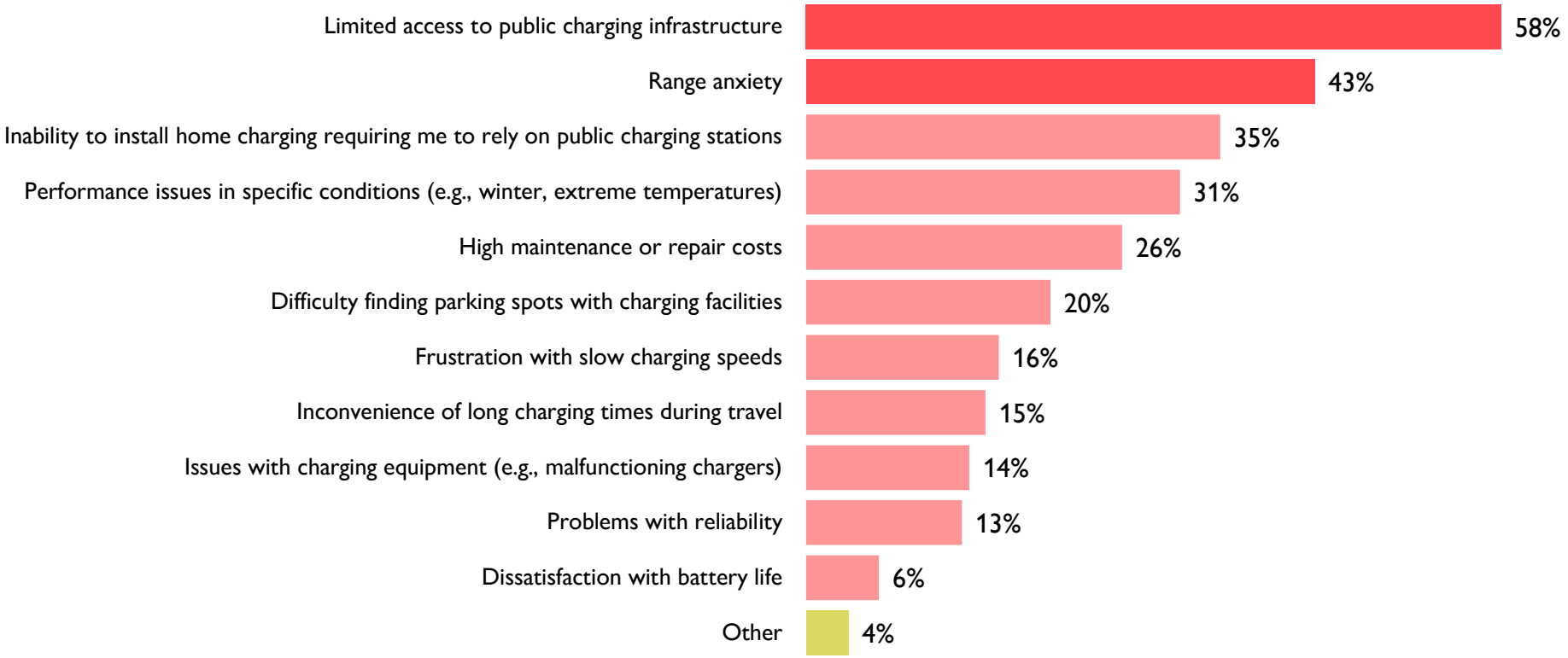
Region						
BC	AB	SK/MB	ON	QC	ATL	NORTH
38%	23%	25%	17%	23%	20%	64%

Yes No Not sure

Base n = 814; those who own an EV or PHEV

What negative experiences have you encountered with your electric vehicle (EV)? Please select all that apply from the following list

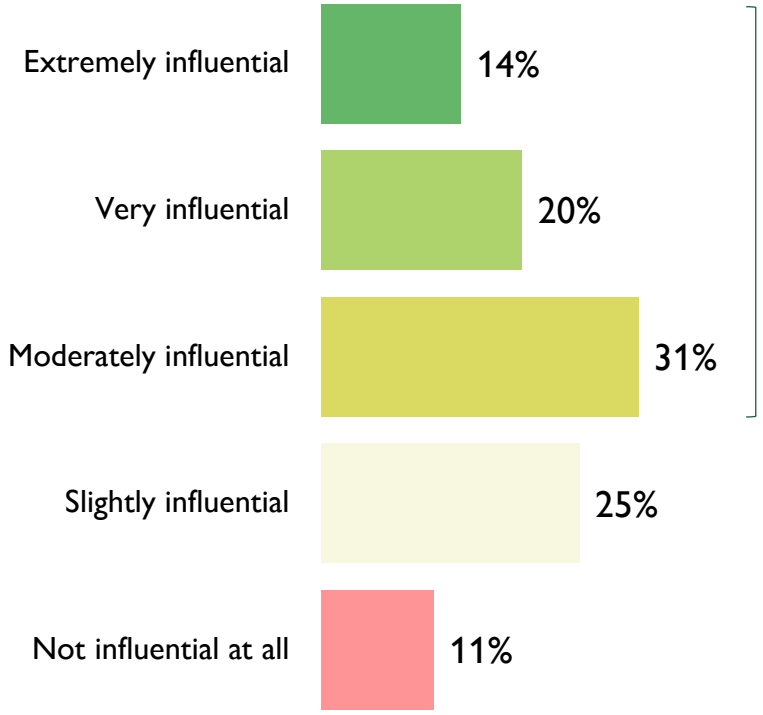
Among those who have had a negative experience with their EV, 58% cite limited access to public charging infrastructure as the main issue, and 43% mention range anxiety.



Base n = 220; those who have had negative experiences with their EV/PHEV in the past year

How influential were government incentives in your decision to purchase/lease an EV/PHEV?

Nearly two-thirds of Canadians who own an EV or PHEV note that government incentives were influential in their decision to purchase their vehicle.



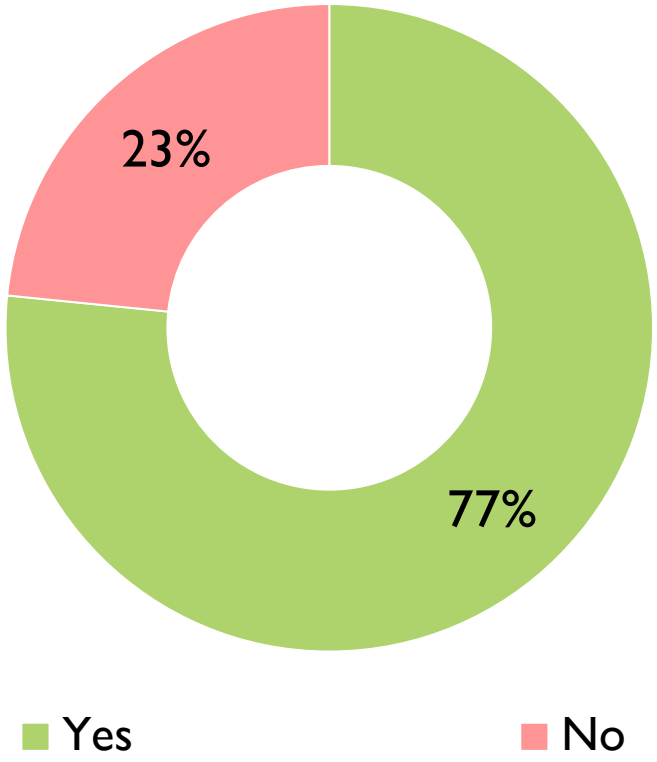
64% influential

Region							Type of Community		
BC	AB	SK/MB	ON	QC	ATL	NORTH	Urban	Suburban	Rural
72%	59%	58%	61%	66%	68%	92%	69%	62%	42%

Base n = 814; those who own an EV or PHEV

Do you have access to home charging?

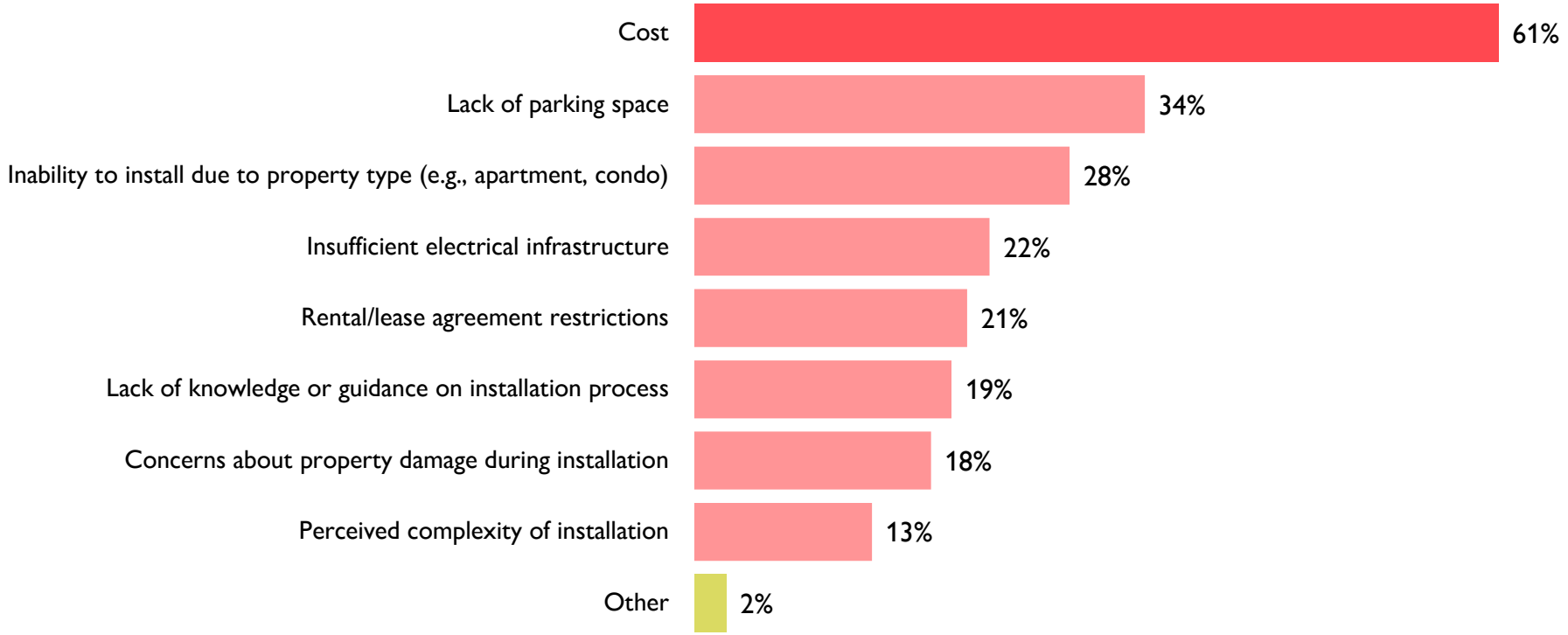
Over 3 in 4 Canadians who own an EV or PHEV have access to a home charging station.



Base n = 814; those who own an EV or PHEV

Are there any logistical or practical barriers preventing you from installing a home charging station? Select up to 3 reason

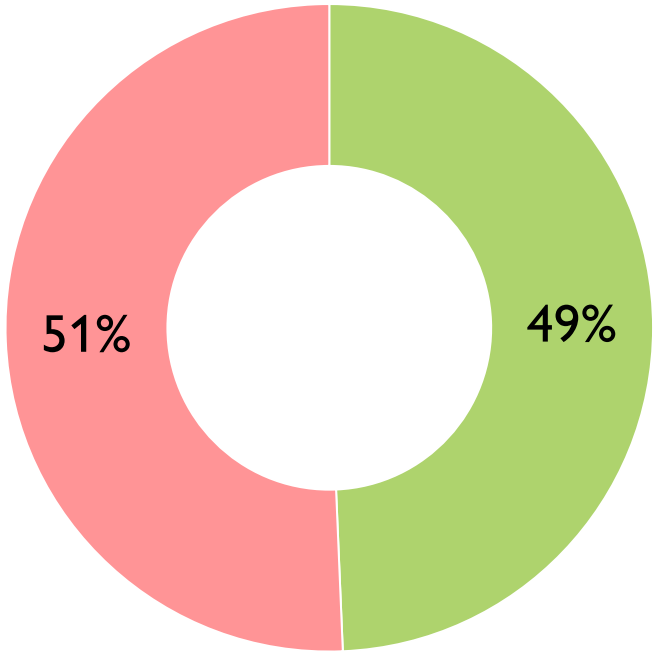
Among those without a home charging station, 61% cite cost as the biggest barrier, followed by a lack of parking space (34%) and the inability to install one due to their property type (28%).



Base n = 185; those who don't have access to home charging

Does your commute require you to charge your vehicle while you are at work?

51% of Canadians note that they do not need to charge their vehicle while at work.

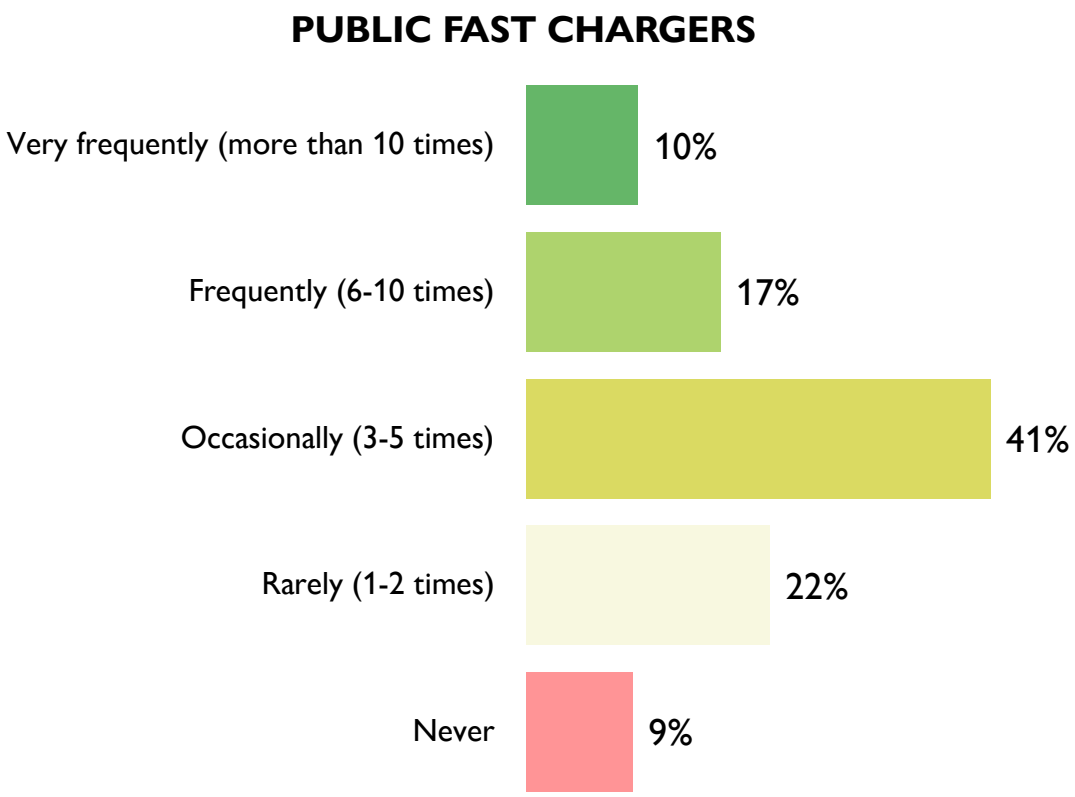


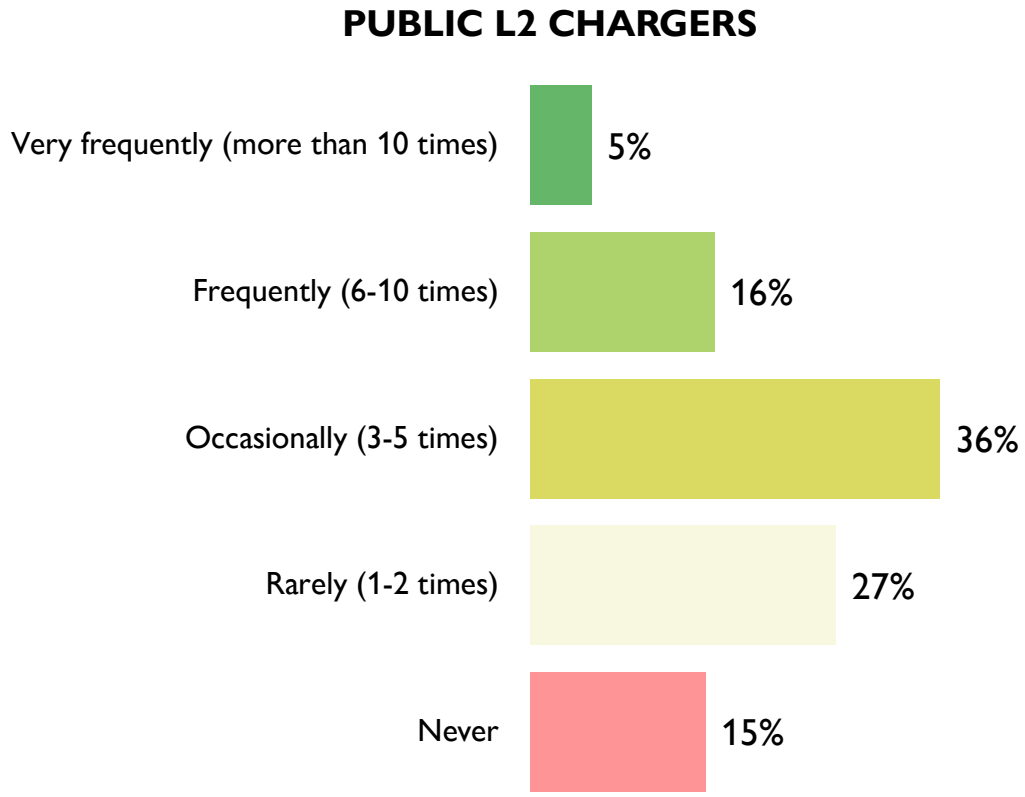
- Yes, I need to charge my vehicle prior to leaving work
- No, I can complete a round trip commute to and from work without needing to charge my vehicle

Base n = 702; those who commute

How often have you used a public fast charger in the last year?
How often have you used a public L2 charger in the last year?

In the past year, 41% of EV/PHEV owners have used a fast charger station at least 3-5 times, while 36% note using public L2 chargers 3-5 times in the last year.

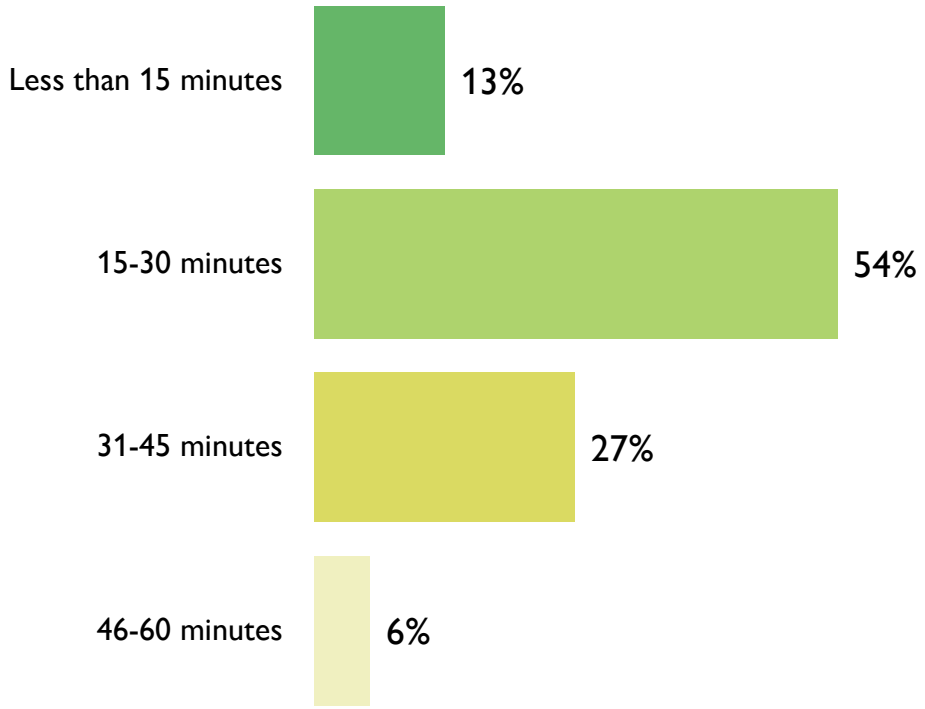




Base n = 814; those who own an EV or PHEV

What amount of time is reasonable when you are charging at a fast charger?

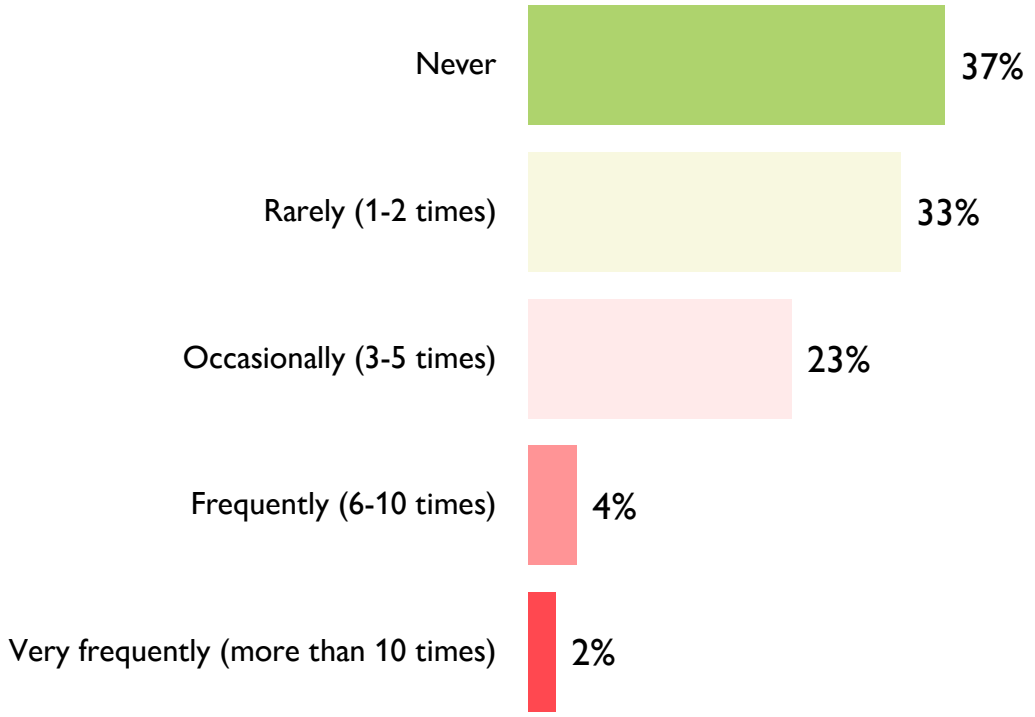
Among EV owners, 54% note that 15-30 minutes is a reasonable amount of time when charging their EV at a fast charger.



Base n = 814; those who own an EV or PHEV

How often have you encountered problems at a public charger in the last year?

Most EV/PHEV owners have never (37%) or rarely (33%) experienced problems at a public charger in the last year.

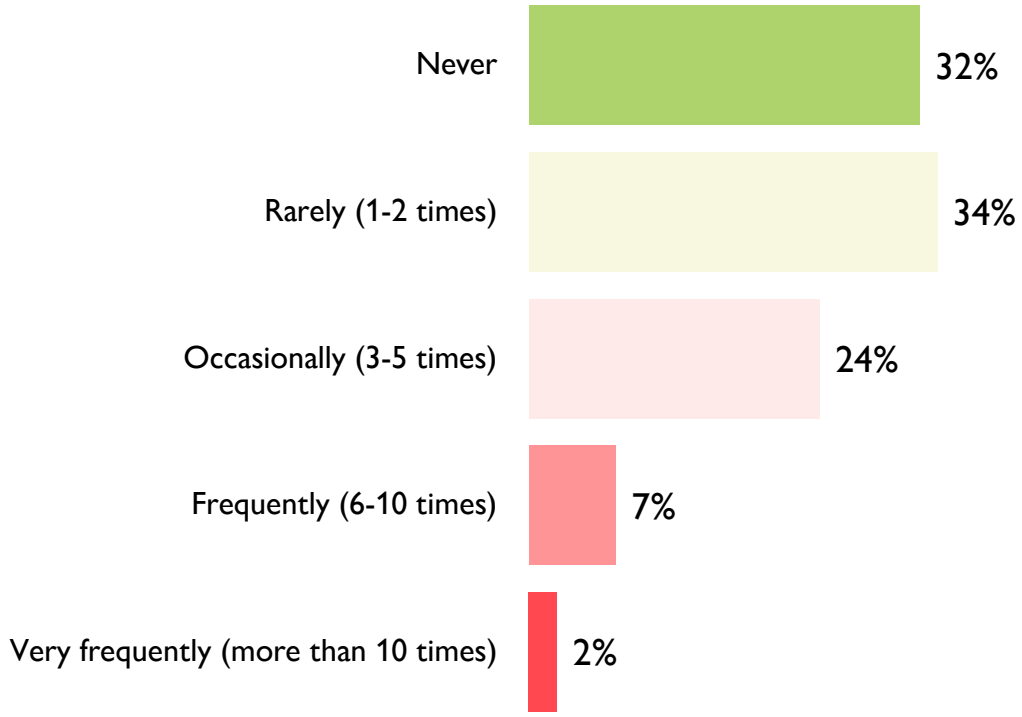


Encountered problems at a public charger	Region						
	BC	AB	SK/MB	ON	QC	ATL	NORTH
Never	33%	41%	35%	33%	45%	41%	17%
Rarely	28%	26%	31%	42%	24%	32%	12%
Occasionally	30%	25%	30%	20%	25%	14%	29%
Frequently	5%	5%	1%	4%	4%	8%	24%
Very frequently	5%	4%	2%	1%	2%	5%	18%

Base n = 814; those who own an EV or PHEV

Have you ever encountered a situation where there were no available charging stations when needed? If so, how often in the last year?

In the past year, 32% of EV/PHEV owners reported never encountering a lack of available charging stations when needed, while 34% said it rarely happened.

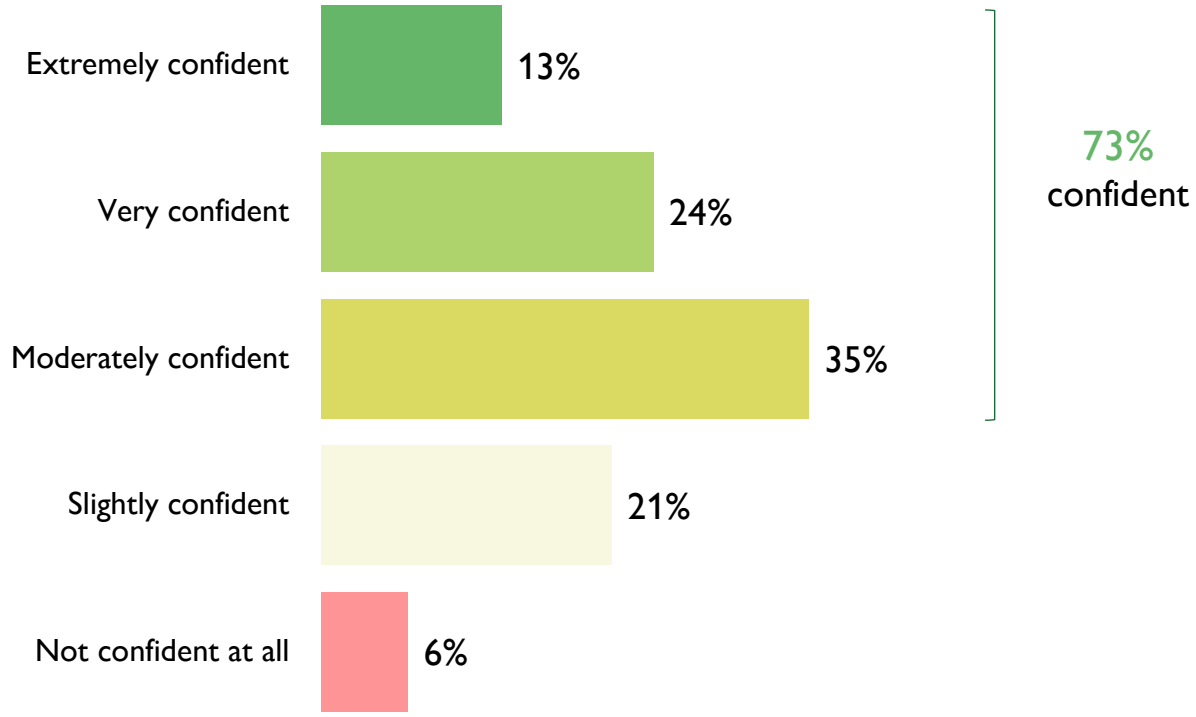


No available charging stations	Region						
	BC	AB	SK/MB	ON	QC	ATL	NORTH
Never	29%	40%	35%	34%	30%	37%	10%
Rarely	30%	32%	34%	35%	36%	27%	20%
Occasionally	28%	17%	26%	25%	21%	23%	31%
Frequently	9%	6%	2%	5%	10%	9%	26%
Very frequently	4%	4%	3%	1%	2%	3%	13%

Base n = 814; those who own an EV or PHEV

Do you feel confident in the public charging infrastructure?

Nearly 3 in 4 EV/PHEV owners (73%) note that they feel confident in the public charging infrastructure, while only 6% note that they do not feel confident at all.



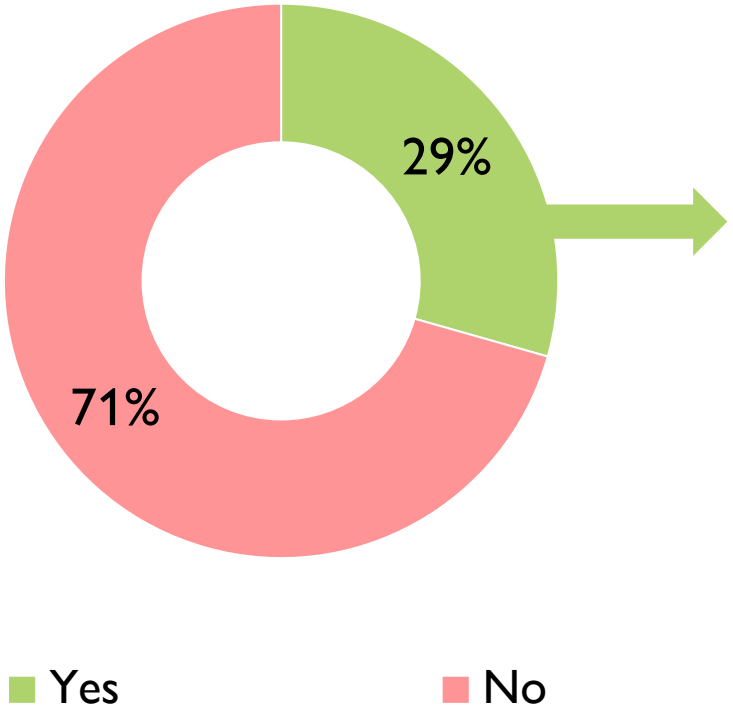
Base n = 814; those who own an EV or PHEV

Although problems encountered at public chargers do increase with the number of visits to them, confidence levels are still high(er) among those who frequently use public chargers.

	Frequency of Use (Past Year) – Public Fast Charger			Frequency of Use (Past Year) – Public L2 Charger		
	Never	1-5 Times	6+ Times	Never	1-5 Times	6+ Times
Encountered problems at a public charger in the past year:						
Never	82%	32%	32%	75%	32%	23%
Rarely (1-2 times)	14%	37%	31%	20%	37%	30%
Occasionally (3-5 times)	1%	28%	20%	1%	27%	29%
Frequently (6-10 times)	3%	2%	9%	2%	3%	10%
Very frequently (more than 10 times)	0%	1%	7%	1%	1%	8%
Encountered no available charging stations in the past year:						
Never	72%	29%	27%	72%	26%	23%
Rarely (1-2 times)	17%	37%	32%	19%	39%	31%
Occasionally (3-5 times)	9%	26%	25%	7%	27%	28%
Frequently (6-10 times)	2%	7%	10%	2%	7%	10%
Very frequently (more than 10 times)	0%	1%	7%	0%	1%	8%
Overall confidence in public charging infrastructure:						
Moderately/very/extremely confident	60%	73%	77%	61%	73%	80%

Did you ever encounter any challenges related to EV-PHEV performance in the winter in the last year?

7 in 10 EV/PHEV owners note that they did not encounter any challenges related to vehicle performance in the winter.

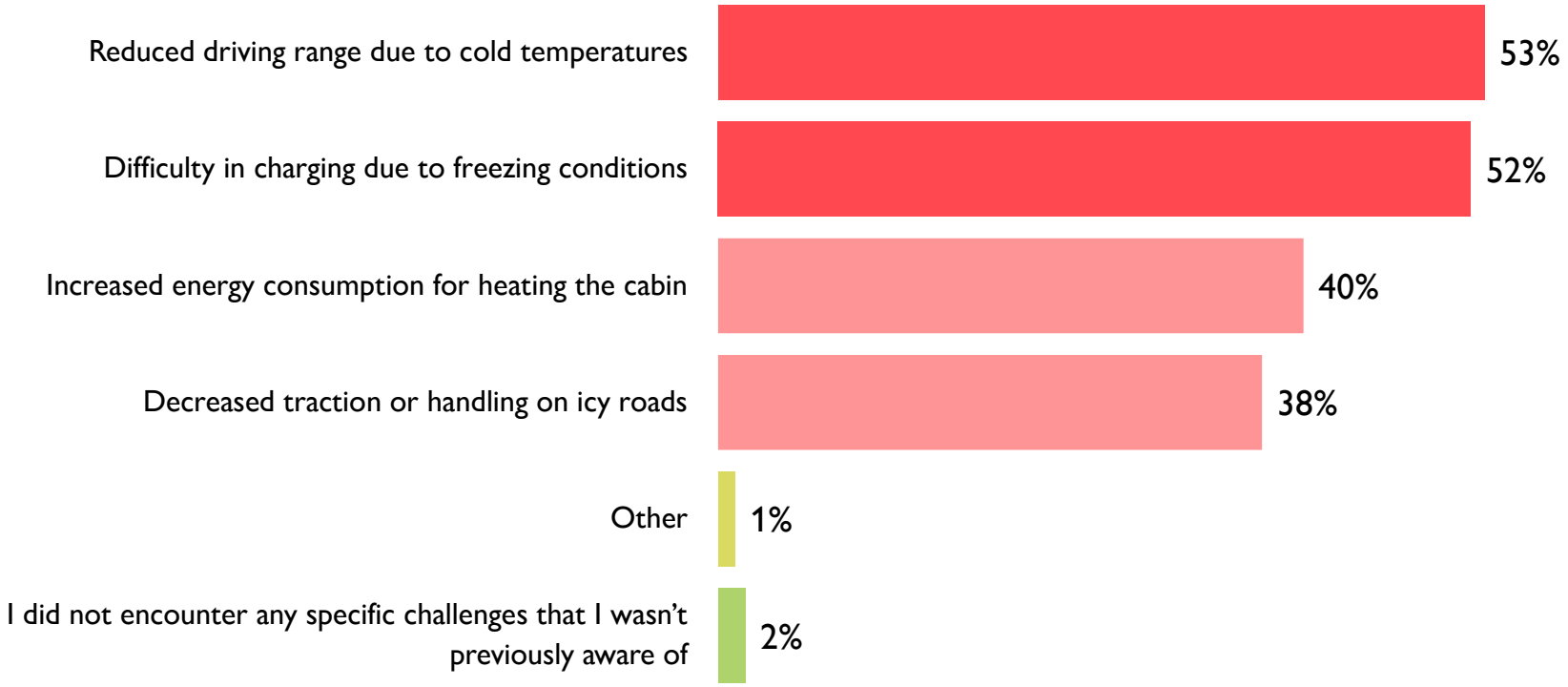


Region							Age			
BC	AB	SK/MB	ON	QC	ATL	NORTH	18-29	30-44	45-59	60+
35%	31%	37%	25%	32%	29%	64%	39%	31%	19%	11%

Base n = 814; those who own an EV or PHEV

What challenges did you encounter related to EV-PHEV performance in the winter last year? (Please select all that apply)

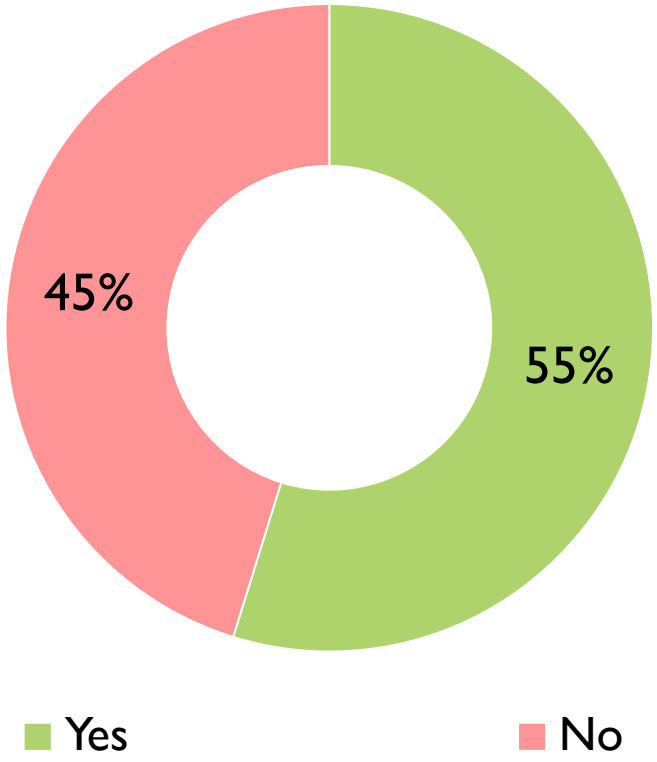
Among those who faced weather-related challenges, 53% reported a reduced driving range due to cold temperatures, and 52% experienced difficulties charging in freezing conditions.



Base n = 275; those who have encountered weather-related challenges in the past year

Have you ever influenced someone else to consider purchasing an EV/PHEV?

More than half of Canadian EV/PHEV owners (55%) report having influenced someone else to consider purchasing an EV/PHEV.

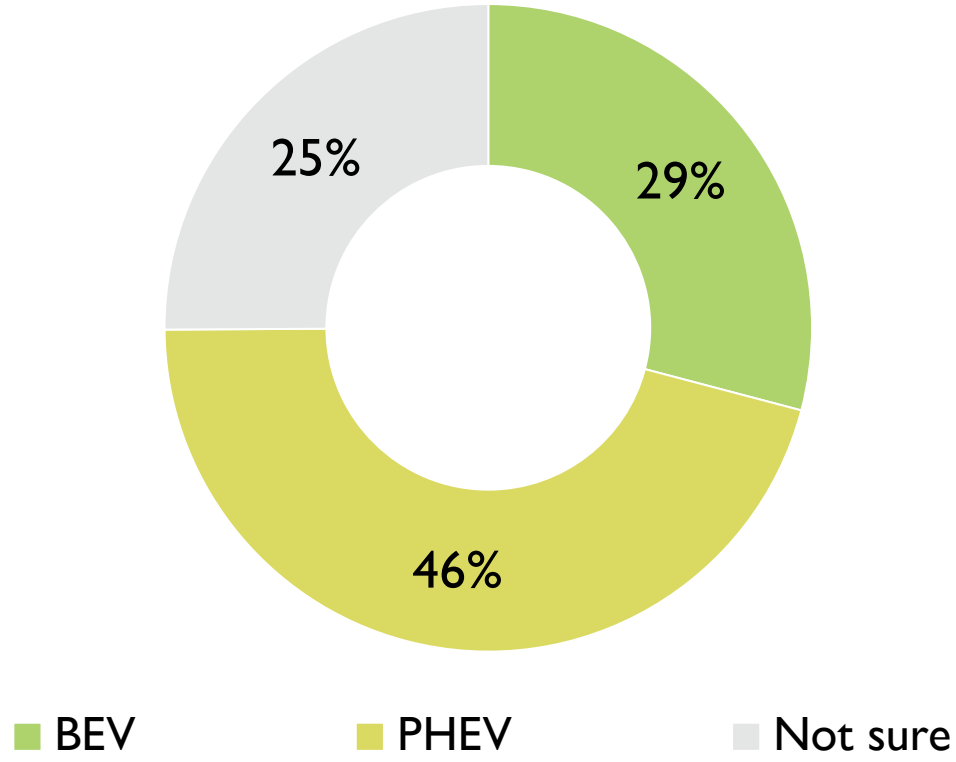


Base n = 814; those who own an EV or PHEV

Intent to Purchase an EV (Non-Owners)

When you are selecting your next vehicle, do you expect you will buy/lease a fully electric vehicle (BEV) or a plug-in hybrid electric vehicle (PHEV)?

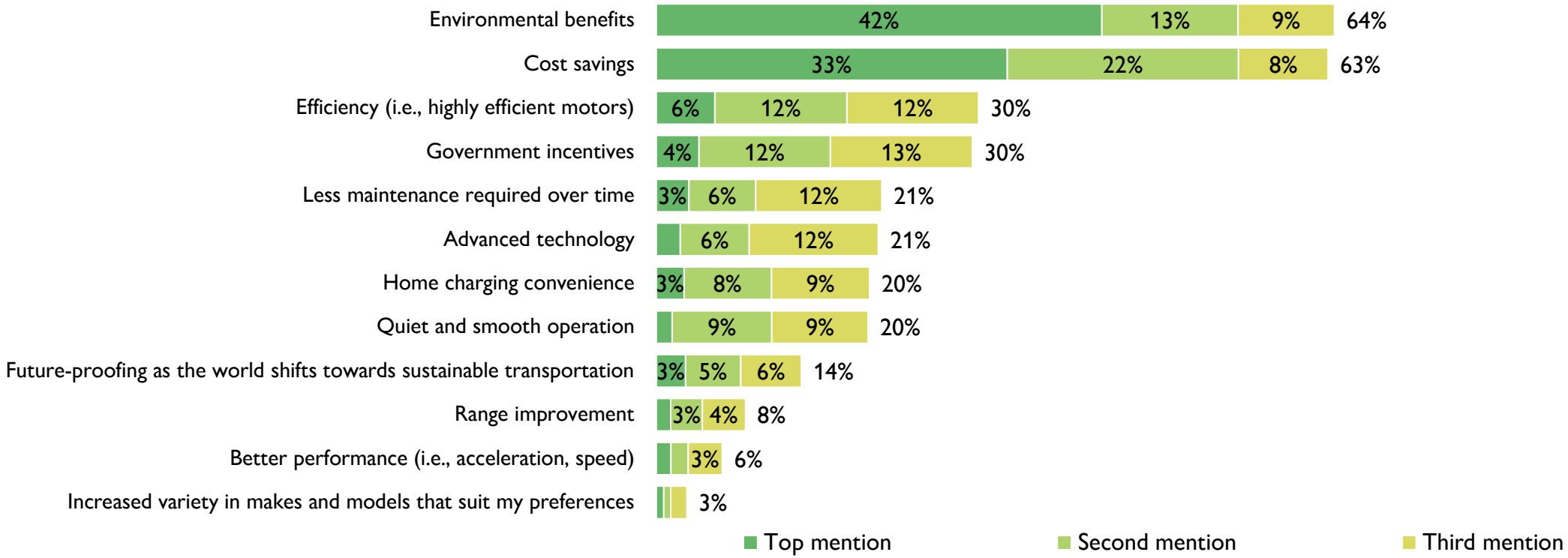
Among those planning to purchase an EV, 29% intend to buy a BEV, while 46% plan to purchase a PHEV.



Base n = 1468; those who don't currently own an EV or PHEV, but intend to buy one for their next vehicle

What are the main reasons that you would consider purchasing an electric vehicle? Please rank the top 3 reasons

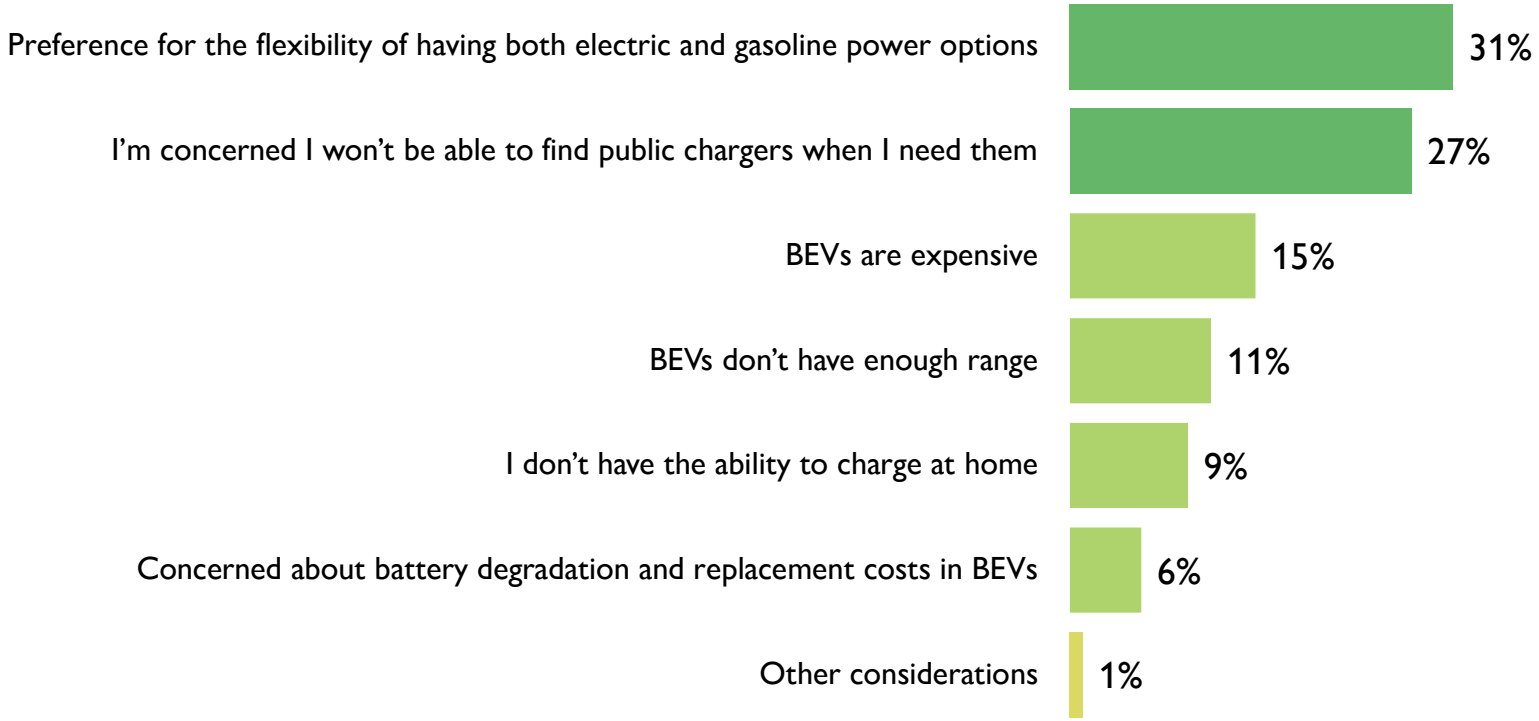
Environmental benefits (64%) and cost savings (63%) are the primary motivators for purchasing an EV.



Base n = 1468; those who don't currently own an EV or PHEV, but intend to buy one for their next vehicle
Total percentage (right of row) shows % who mentioned this within their top 3.

Why do you expect to select a PHEV over a BEV?

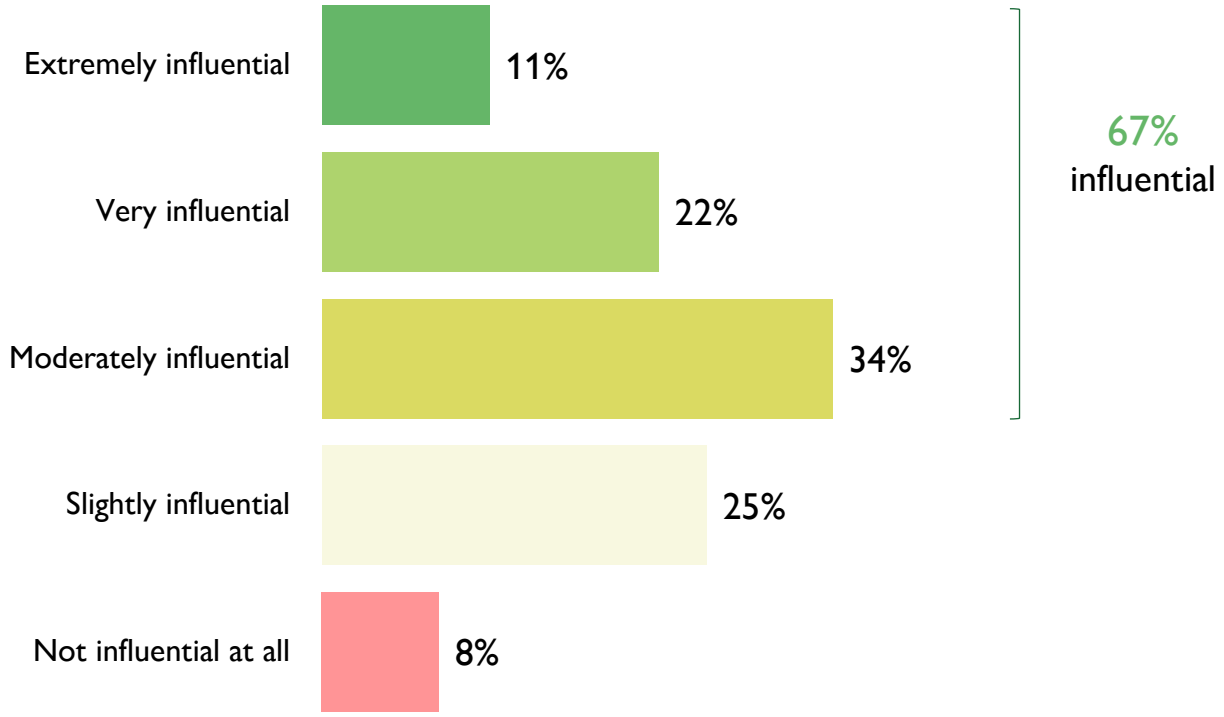
Among those opting for a PHEV over a BEV, the primary reason is a preference for the flexibility of having both electric and gas power options (31%), followed by concerns about the availability of public chargers when needed (27%).



Base n = 724; those who would choose a PHEV over a BEV

How influential are government incentives in your decision to consider purchasing an EV/PHEV?

Two-thirds (67%) indicate that government incentives are influential in their decision to consider purchasing an EV/PHEV.

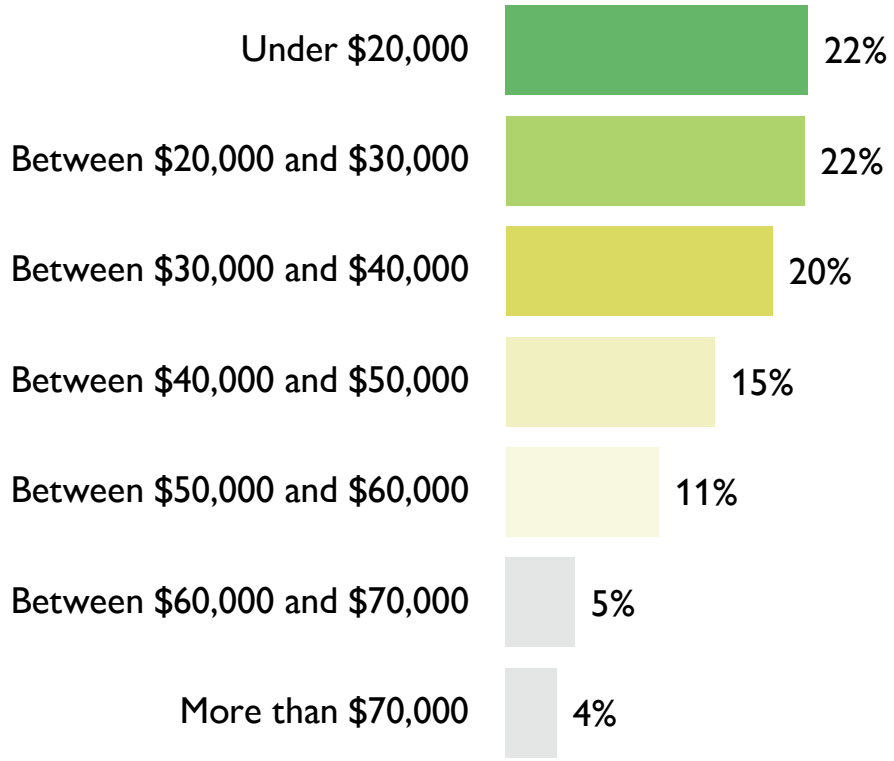


Base n = 1468; those who don't currently own an EV or PHEV, but intend to buy one for their next vehicle

Barriers to EV Adoption

What is your budget for your next vehicle?

Most Canadians anticipate spending less than $40,000 on their next vehicle (64%)



Base n = 6150

What is your budget for your next vehicle?

NEXT VEHICLE BUDGET

Next Vehicle Budget	EV Owner		Region							Type of Community			Age			
	Yes	No	BC	AB	SK/MB	ON	QC	ATL	NORTH	Urban	Suburban	Rural	18-29	30-44	45-59	60+
Under $20,000	6%	25%	20%	25%	28%	21%	23%	24%	13%	22%	19%	31%	22%	23%	23%	21%
Between $20,000 and $30,000	16%	23%	19%	24%	21%	21%	25%	23%	18%	21%	23%	22%	26%	18%	20%	25%
Between $30,000 and $40,000	16%	20%	20%	18%	19%	20%	19%	21%	11%	18%	22%	20%	18%	19%	20%	21%
Between $40,000 and $50,000	16%	15%	17%	16%	14%	16%	14%	15%	20%	16%	16%	13%	12%	15%	15%	18%
Between $50,000 and $60,000	23%	9%	14%	8%	9%	12%	11%	9%	19%	12%	12%	8%	12%	13%	12%	9%
Between $60,000 and $70,000	12%	4%	6%	5%	5%	5%	4%	5%	13%	6%	4%	5%	4%	7%	6%	3%
More than $70,000	11%	3%	4%	4%	4%	4%	4%	3%	6%	4%	4%	2%	5%	5%	3%	2%

Base n = 6150

Those with a higher budget for their next vehicle are more likely to: currently own an EV, plan to buy in the next 12 months, and consider a new vehicle. The higher the budget, the more likely they are to consider an EV.

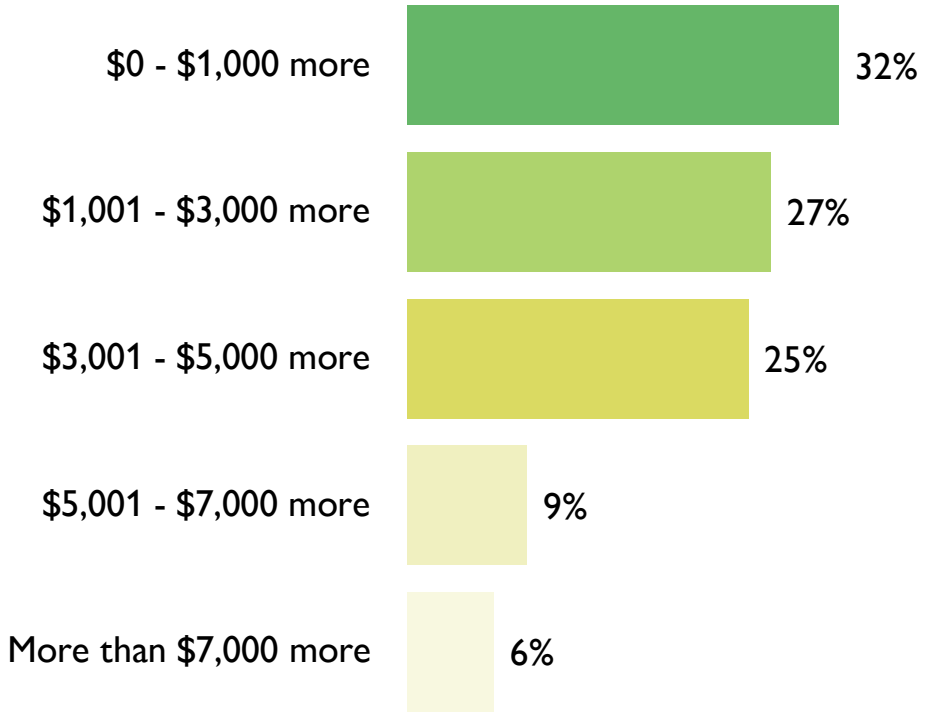
	Next Vehicle Budget						
	Less than $20K	$20K to $30K	$30K to $40K	$40K to $50K	$50K to $60K	$60K to $70K	More than $70K
Currently own an EV:							
Yes	4%	11%	13%	16%	32%	37%	44%
No	96%	89%	87%	84%	68%	63%	56%
Plan to Purchase next vehicle:							
Within 12 months	17%	26%	26%	37%	42%	43%	57%
Will Consider…							
New	14%	39%	55%	67%	74%	77%	77%
Used	53%	25%	13%	8%	7%	5%	5%
Both	33%	36%	33%	25%	19%	17%	18%
Next Vehicle (among those who plan to purchase at some point):							
EV/PHEV	16%	34%	41%	55%	60%	59%	60%
Non-plug-in hybrid	7%	9%	12%	11%	10%	6%	10%
Gas/diesel	56%	38%	33%	25%	20%	26%	24%
Undecided	22%	19%	14%	9%	10%	9%	6%

Those with a higher budget are more likely to opt for a fully electric vehicle (BEV). Final intent to purchase an EV is more balanced across all budgets after the knowledge questions (except for those with a budget of less than $20K).

	Next Vehicle Budget						
	Less than $20K	$20K to $30K	$30K to $40K	$40K to $50K	$50K to $60K	$60K to $70K	More than $70K
Next Vehicle (among Non-EV Owners):							
Inclined to choose EV	27%	41%	46%	59%	62%	55%	54%
Inclined to choose Gas	73%	59%	54%	41%	38%	45%	46%
BEV or PHEV (among non-EV owners who intend to buy an EV next):							
BEV	16%	24%	22%	34%	43%	36%	50%
PHEV	44%	49%	49%	47%	42%	44%	22%
Final Intent to Purchase (after knowledge questions):							
Certain to choose electric	8%	12%	12%	17%	24%	23%	28%
Very likely to choose electric	12%	18%	18%	22%	28%	19%	20%
Inclined to choose electric	27%	32%	35%	28%	20%	28%	19%
Inclined to choose gas/diesel	21%	18%	18%	15%	13%	13%	11%
Very likely to choose gas/diesel	13%	9%	7%	7%	7%	8%	12%
Certain to choose gas/diesel	19%	11%	10%	10%	9%	9%	11%
NET: Leaning towards EV	47%	62%	65%	68%	71%	70%	67%
NET: Leaning towards gas/diesel	53%	38%	35%	32%	29%	30%	33%

When considering the upfront cost of an electric vehicle vs a traditional gas vehicle, how much more do you consider acceptable today?

1 in 4 Canadians note that they would be willing to pay $1,001 to $3,000 more for an EV vs. a traditional gas vehicle (27%), while 25% would be willing to pay $3,001 to $5,000 more.



Base n = 6150

When considering the upfront cost of an electric vehicle vs a traditional gas vehicle, how much more do you consider acceptable today?

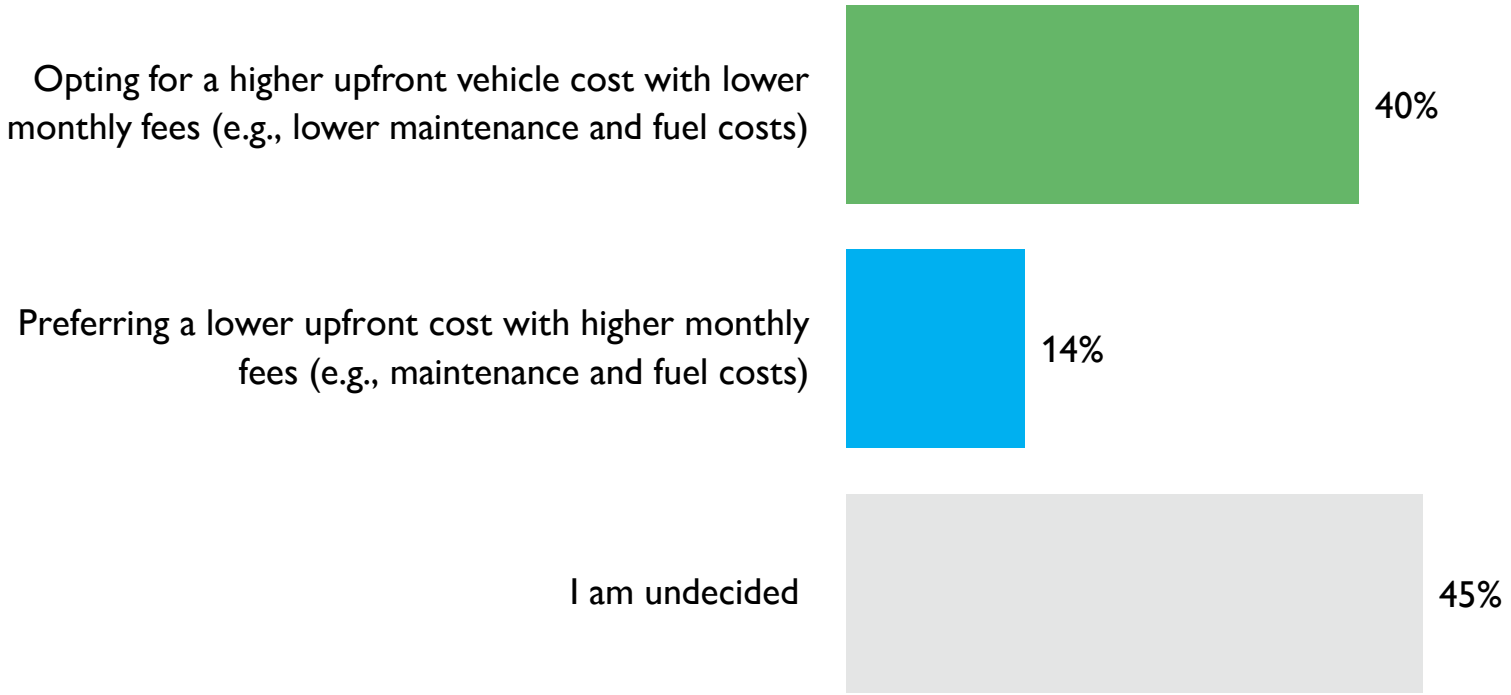
ACCEPTABLE PREMIUM FOR AN EV (COMPARED TO A GAS VEHICLE)

Acceptable Premium	EV Owner		Region							Type of Community			Age			
	Yes	No	BC	AB	SK/MB	ON	QC	ATL	NORTH	Urban	Suburban	Rural	18-29	30-44	45-59	60+
Up to $1,000 more	13%	36%	31%	39%	36%	33%	28%	33%	27%	30%	31%	41%	23%	28%	38%	37%
$1,001 to $3,000 more	28%	27%	25%	24%	27%	29%	27%	28%	18%	29%	26%	23%	33%	28%	25%	24%
$3,001 to $5,000 more	34%	24%	27%	22%	23%	25%	28%	25%	33%	26%	26%	23%	29%	28%	22%	24%
$5,001 to $7,000 more	16%	8%	12%	9%	8%	7%	10%	10%	16%	9%	10%	6%	8%	9%	10%	9%
More than $7,000 more	9%	6%	6%	6%	6%	6%	8%	5%	6%	6%	7%	7%	6%	7%	6%	7%

Base n = 6150

Which option would you be more inclined to choose for your vehicle financing preferences?

Two out of five Canadians are open to choosing a higher upfront vehicle cost with lower monthly fees, while 45% are undecided. This underscores an opportunity to educate the undecided about the financial benefits and savings associated with a higher upfront vehicle cost.



Base n = 6150

Which option would you be more inclined to choose for your vehicle financing preferences?

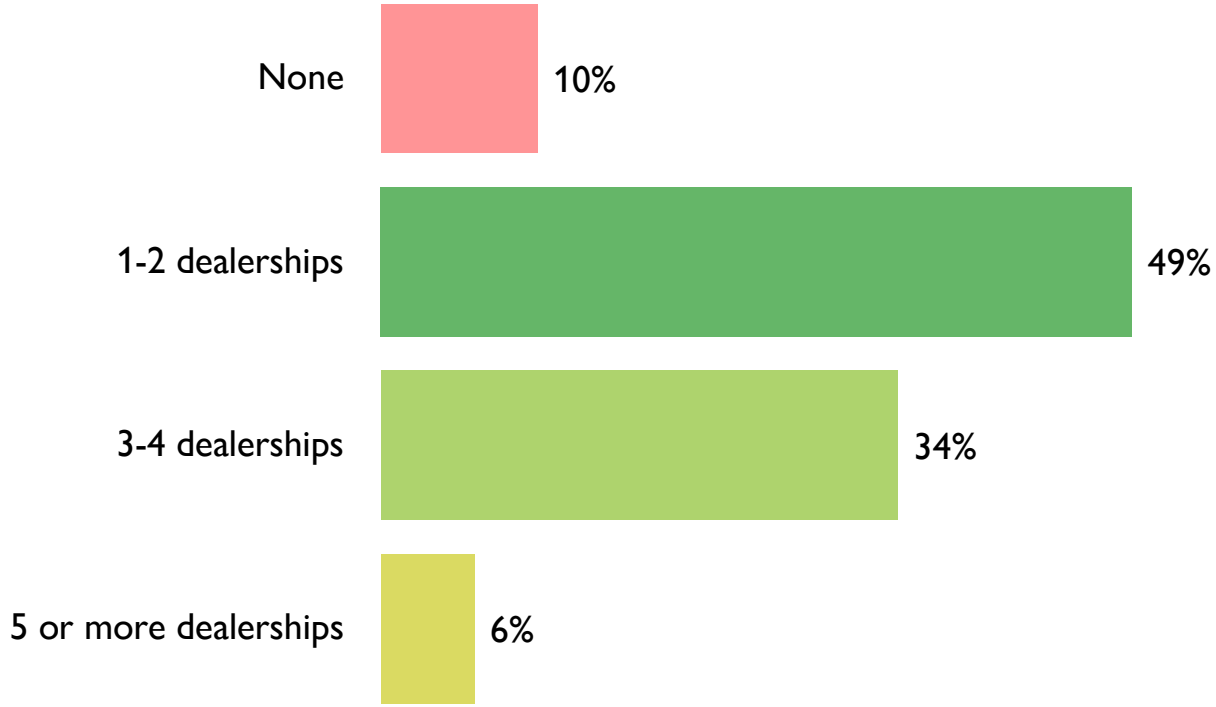
UPFRONT COST VS. MONTHLY FEES

Would prefer…	EV Owner		Region							Type of Community			Age			
	Yes	No	BC	AB	SK/MB	ON	QC	ATL	NORTH	Urban	Suburban	Rural	18-29	30-44	45-59	60+
Higher upfront cost and lower monthly fees	53%	38%	46%	41%	37%	42%	36%	40%	47%	43%	39%	34%	52%	48%	35%	30%
Lower upfront cost and higher monthly fees	21%	13%	13%	11%	12%	16%	14%	13%	15%	14%	15%	12%	19%	18%	14%	8%
Undecided	26%	49%	41%	48%	50%	43%	50%	47%	38%	43%	46%	54%	29%	34%	51%	62%

Base n = 6150

How many dealerships would you expect to visit before purchasing your next vehicle?

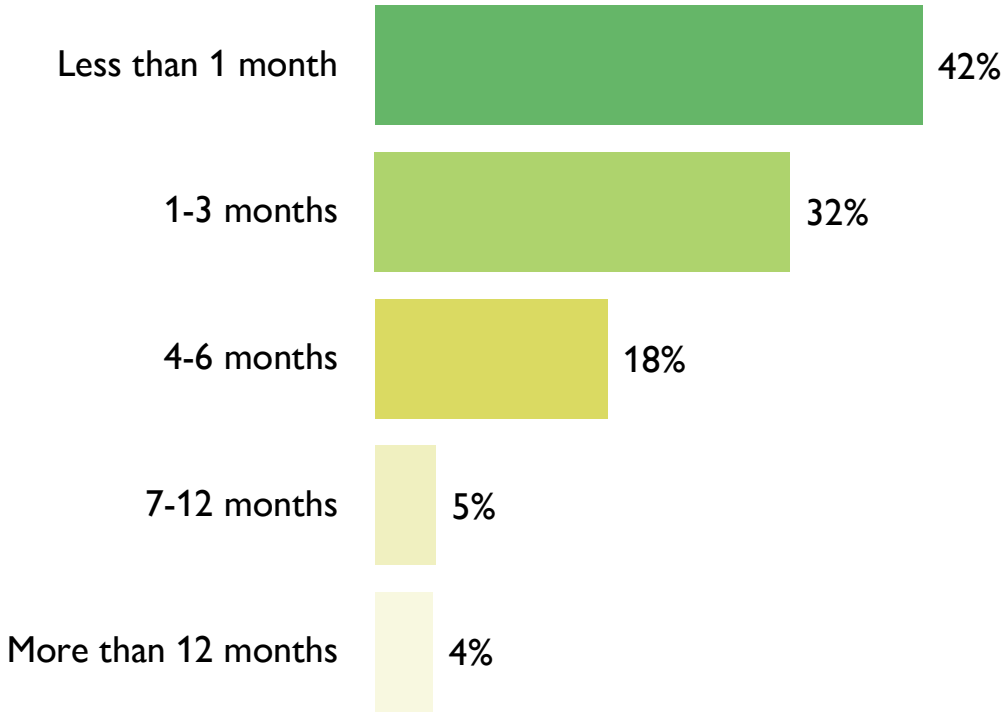
Nearly 1 in 2 Canadians note that they expect to visit 1-2 dealerships (49%) before purchasing their next vehicle.



Base n = 6150

How long would you expect to wait to receive your next vehicle after placing an order?

2 in 5 Canadians expect to wait less than 1 month for their next vehicle after placing an order (42%), while 32% are expect to wait 1 to 3 months.



Base n = 6150

How long would you expect to wait to receive your next vehicle after placing an order?

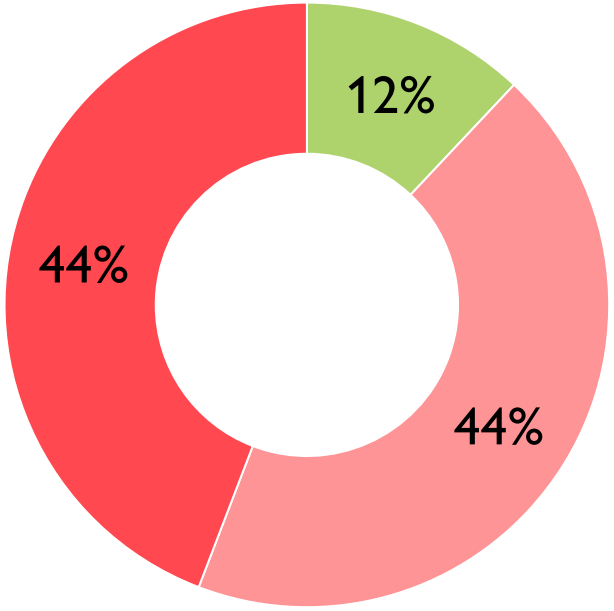
ACCEPTABLE WAIT TIME TO RECEIVE A VEHICLE

Acceptable wait time	EV Owner		Region							Type of Community			Age			
	Yes	No	BC	AB	SK/MB	ON	QC	ATL	NORTH	Urban	Suburban	Rural	18-29	30-44	45-59	60+
Less than 1 month	18%	46%	41%	51%	49%	41%	34%	48%	34%	40%	41%	48%	32%	36%	46%	50%
1 to 3 months	36%	31%	34%	30%	32%	32%	30%	32%	28%	32%	33%	28%	37%	33%	28%	29%
4 to 6 months	32%	15%	16%	12%	14%	18%	22%	15%	28%	18%	18%	17%	23%	20%	16%	14%
7 to 12 months	10%	4%	5%	3%	2%	5%	6%	3%	7%	5%	5%	3%	4%	7%	4%	3%
More than 12 months	3%	5%	4%	3%	2%	4%	8%	3%	3%	5%	3%	5%	3%	4%	6%	4%

Base n = 6150

Has the availability of EVs near you prevented you from purchasing one in the past?

Only one in ten individuals consider the availability of EVs near them as a barrier to purchase, while 44% believe it wouldn't be a barrier for them but anticipate it could be for others.



Yes No, but I expect it would No, but I expect it would not

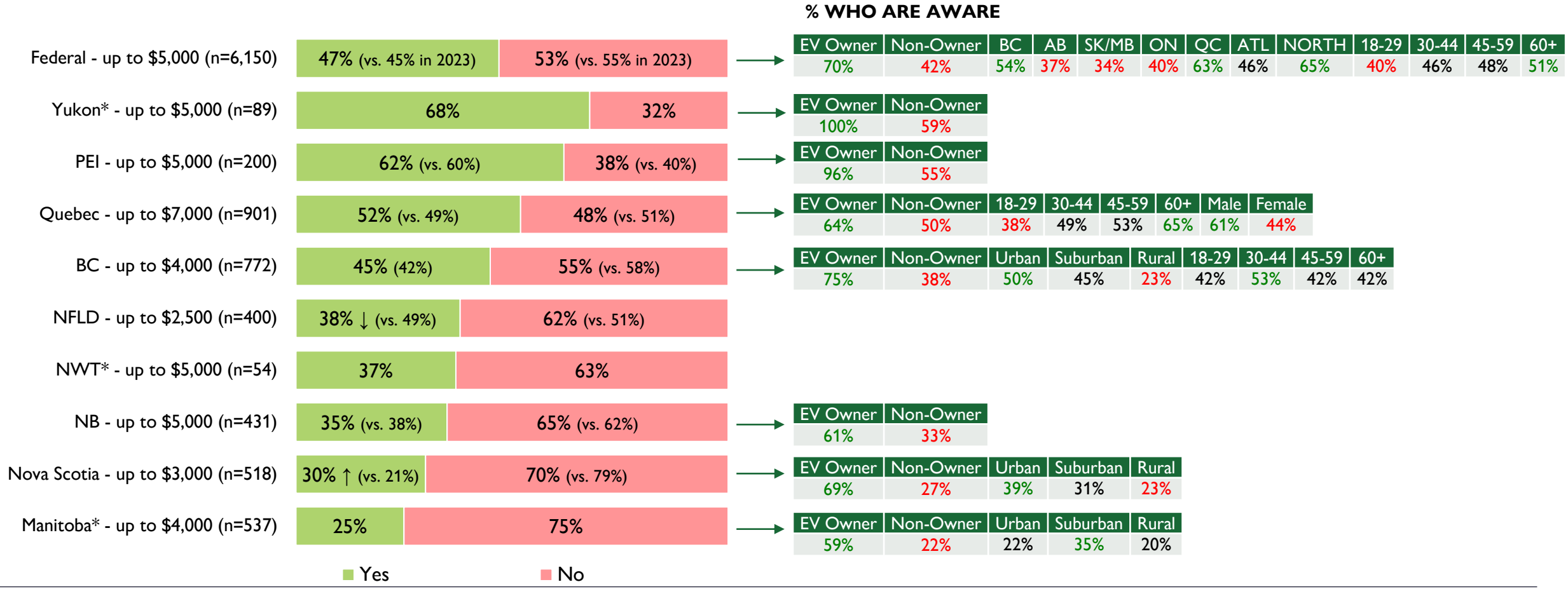
	EV Owner		Region							Age			
	Yes	No	BC	AB	SK/MB	ON	QC	ATL	NORTH	18-29	30-44	45-59	60+
Yes	26%	9%	14%	10%	11%	11%	13%	11%	28%	16%	17%	9%	7%
No, but I expect it would	46%	43%	41%	42%	47%	45%	42%	47%	55%	45%	44%	42%	44%
No, but I expect it would not	29%	47%	45%	48%	42%	43%	45%	42%	17%	39%	39%	48%	49%

Base n = 6150

Knowledge of EVs

Are you aware of the [federal/provincial] government rebate of up to [insert applicable amount] for purchasing an electric vehicle?

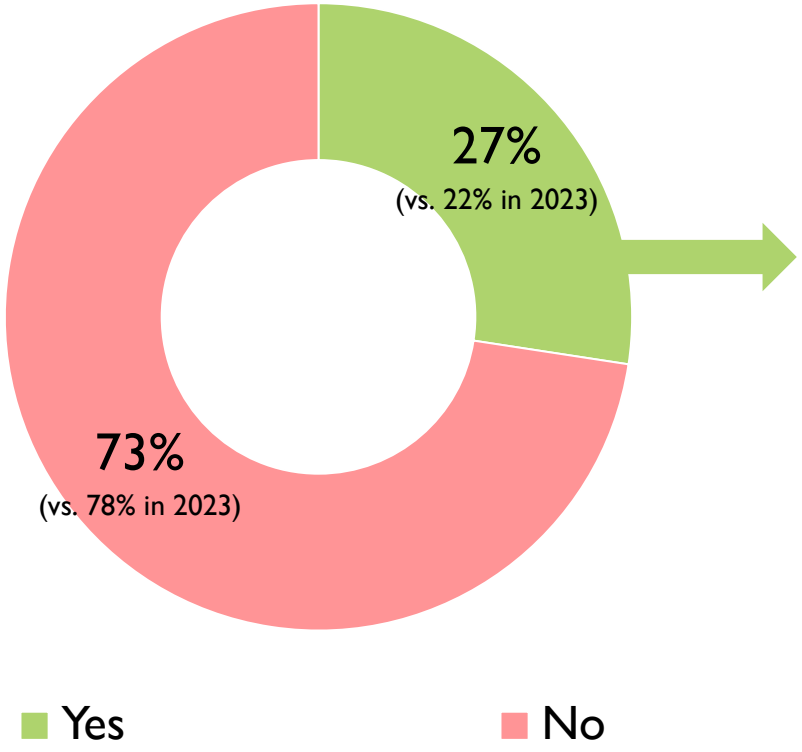
Most Canadians are unaware of the federal/provincial government rebates for EVs



*Not applicable in 2023

Are you aware that you may be eligible for a federal tax deduction specifically for the purchase of an electric vehicle if you are self-employed or own a company?

Only a quarter of Canadians (27%) are aware of the federal tax deduction for purchasing an EV if they are self-employed or own a company. This reflects a 5-point increase in awareness compared to August 2023.

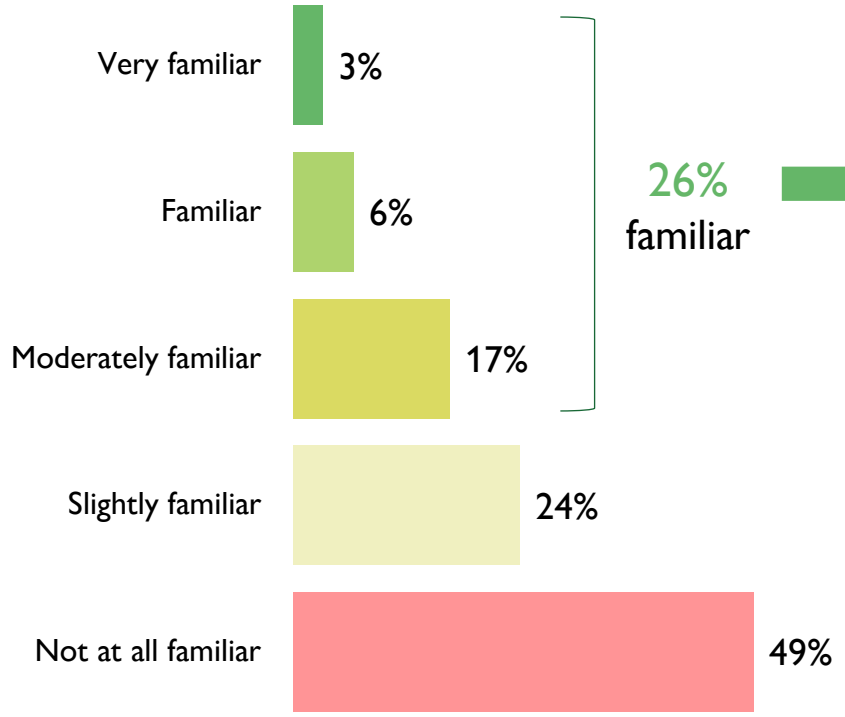


EV Owner		Region							Type of Community			Age			
Yes	No	BC	AB	SK/MB	ON	QC	ATL	NORTH	Urban	Suburban	Rural	18-29	30-44	45-59	60+
56%	22%	29%	23%	19%	29%	31%	22%	40%	30%	26%	24%	35%	35%	26%	17%

Base n = 6150

Are you familiar with other incentives available to EVs (e.g., ferries, dedicated lanes on highways, dedicated parking spots closer to the entrance, etc.)?

Most Canadians are largely unaware of other incentives available to EV owners (49%), while 1 in 4 are only slightly familiar (24%).

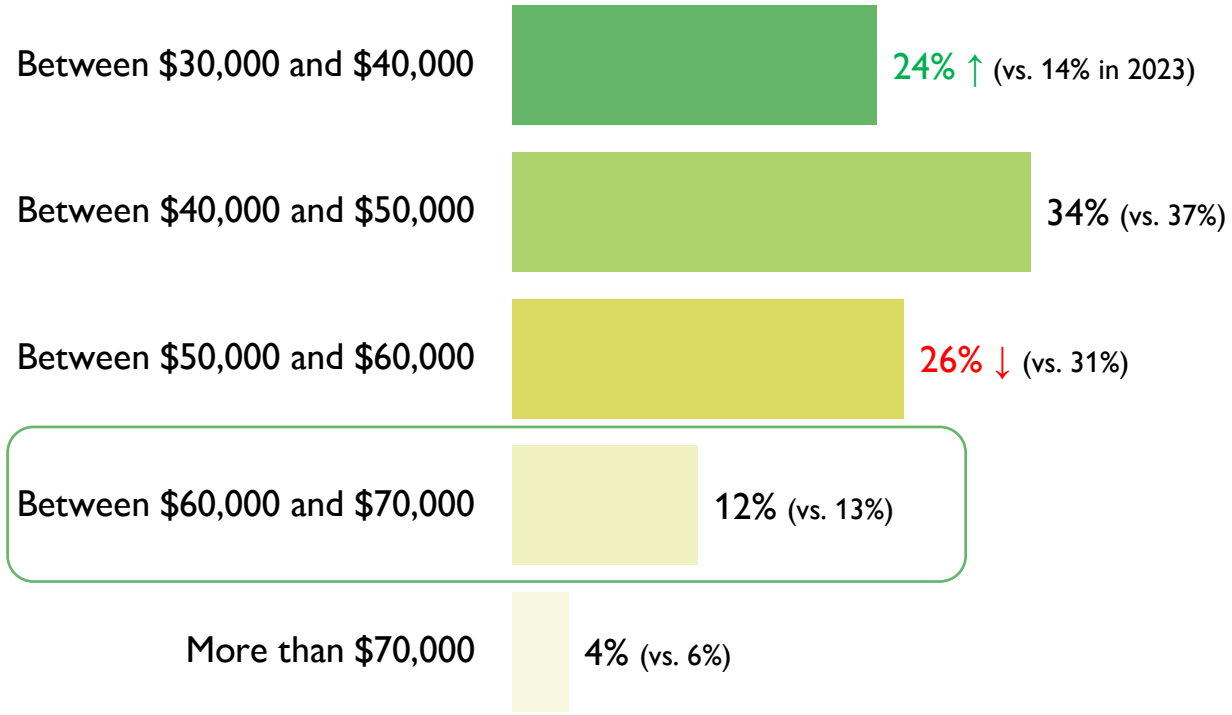


EV Owner		Region							Type of Community			Age			
Yes	No	BC	AB	SK/MB	ON	QC	ATL	NORTH	Urban	Suburban	Rural	18-29	30-44	45-59	60+
51%	22%	31%	20%	16%	26%	32%	20%	46%	28%	28%	19%	35%	35%	25%	14%

Base n = 6150

What is the average price of a new light duty vehicle (car, SUV, pickup truck) in Canada?

Only 1 in 10 Canadians (12%) are aware of the average price of a new light duty vehicle in Canada.



Base n = 6150

*2023 question phrased as follows: In June 2023, what was the average purchase price for a new passenger vehicle (e g , car, SUV, pickup truck, minivan) in Canada, according to Auto Trader?

What is the average price of a new light duty vehicle (car, SUV, pickup truck) in Canada?

BEST GUESS: AVERAGE PRICE OF A NEW LIGHT DUTY VEHICLE

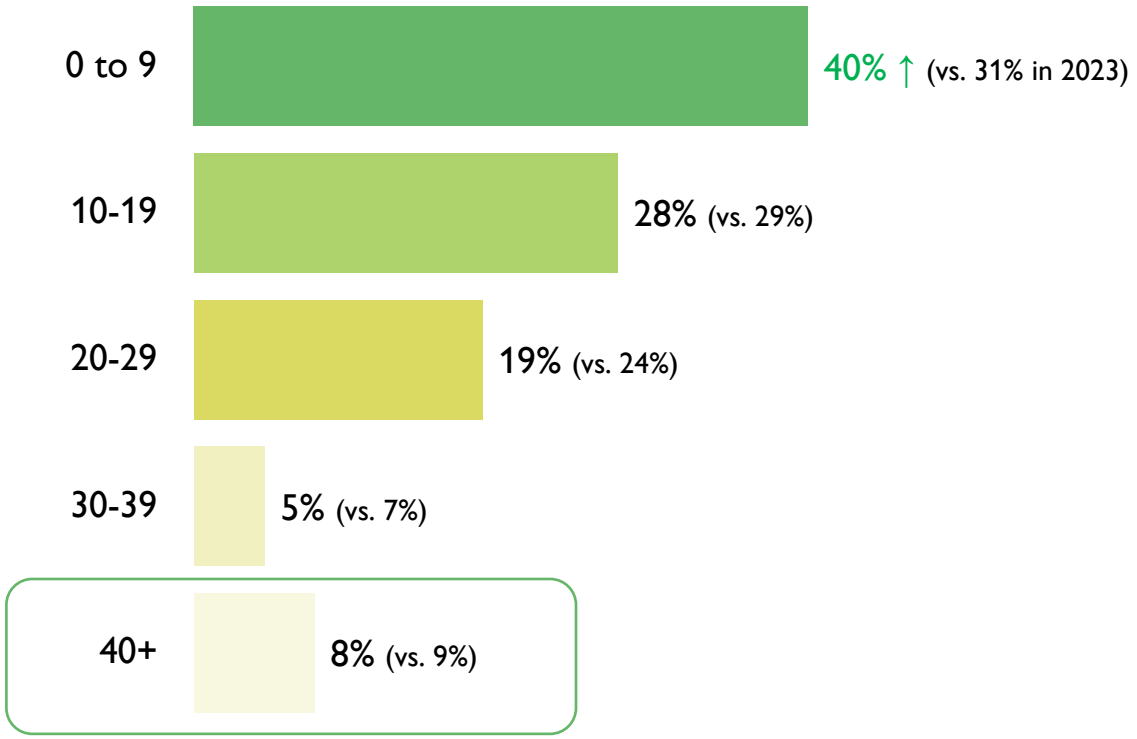
Average purchase price of a new LDV	EV Owner		Region							Type of Community			Age			
	Yes	No	BC	AB	SK/MB	ON	QC	ATL	NORTH	Urban	Suburban	Rural	18-29	30-44	45-59	60+
Between $30,000 and $40,000	17%	25%	20%	21%	20%	25%	27%	26%	8%	24%	24%	24%	23%	23%	23%	27%
Between $40,000 and $50,000	33%	34%	35%	34%	33%	34%	36%	32%	19%	34%	35%	32%	36%	32%	33%	36%
Between $50,000 and $60,000	29%	25%	27%	27%	26%	26%	24%	26%	38%	26%	26%	25%	27%	26%	28%	23%
Between $60,000 and $70,000	16%	12%	15%	14%	16%	11%	10%	14%	24%	12%	12%	15%	10%	14%	12%	13%
More than $70,000	6%	3%	4%	4%	6%	4%	3%	3%	11%	4%	3%	5%	3%	4%	5%	3%

Base n = 6150

*2023 question phrased as follows: In June 2023, what was the average purchase price for a new passenger vehicle (e g , car, SUV, pickup truck, minivan) in Canada, according to Auto Trader?

How many new electric and plug-in hybrid vehicle models are available below the average price of a new vehicle in Canada, when including the federal rebate?

Only a small fraction of Canadians (8%) are aware that there are over 40 EVs available below the average price of a new vehicle in Canada.



Base n = 6150

How many new electric and plug-in hybrid vehicle models are available below the average price of a new vehicle in Canada, when including the federal rebate?

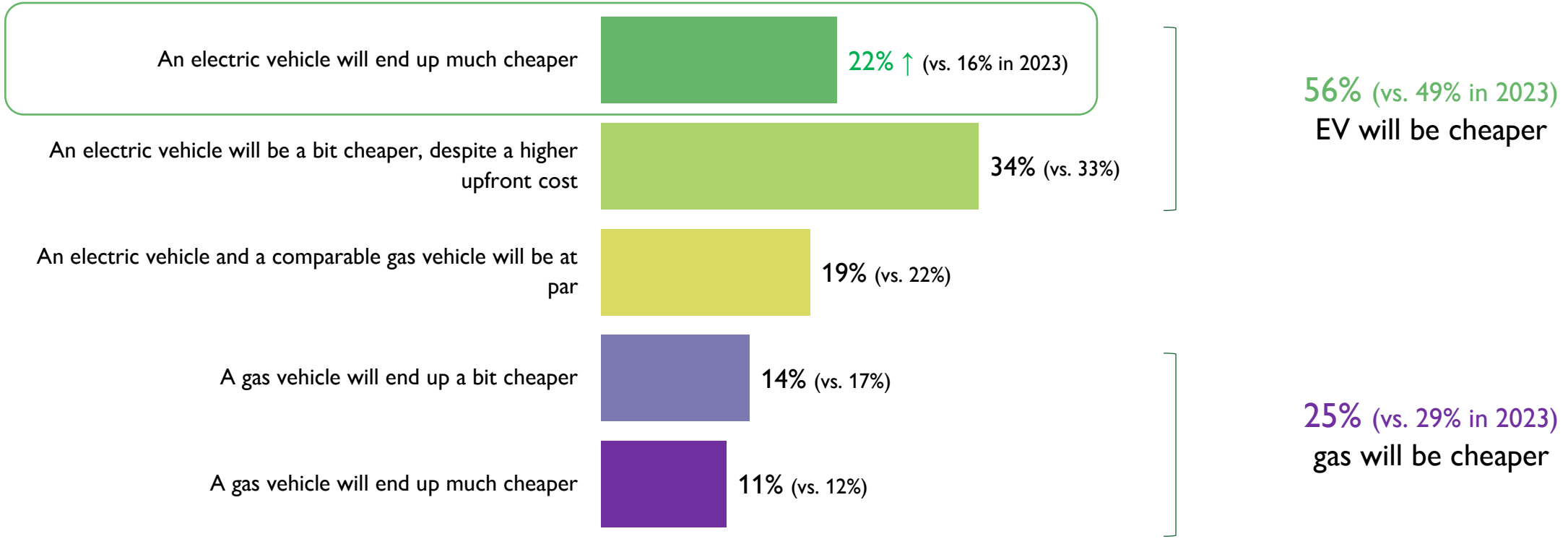
BEST GUESS: NUMBER OF EV/PHEV MODELS AT BELOW-AVERAGE COST

Number of EV/PHEV models at below-average cost	EV Owner		Region							Type of Community			Age			
	Yes	No	BC	AB	SK/MB	ON	QC	ATL	NORTH	Urban	Suburban	Rural	18-29	30-44	45-59	60+
0 to 9	26%	43%	40%	39%	38%	43%	39%	41%	29%	38%	41%	46%	20%	35%	47%	54%
10 to 19	27%	28%	26%	28%	29%	27%	31%	27%	28%	27%	28%	28%	34%	31%	26%	23%
20 to 29	32%	17%	20%	18%	18%	20%	19%	15%	15%	20%	19%	14%	31%	20%	15%	13%
30 to 39	6%	4%	5%	5%	6%	4%	5%	5%	9%	5%	4%	4%	5%	6%	4%	4%
40+	9%	8%	9%	10%	10%	6%	7%	11%	20%	9%	7%	7%	10%	8%	8%	6%

Base n = 6150

Which of the following statements is true regarding the total cost of ownership when purchasing a new vehicle?

56% of Canadians believe the total cost of ownership of an EV will end up being cheaper than a gas vehicle, with 22% believing it will end up being “much cheaper” in the end.



Base n = 6150

Which of the following statements is true regarding the total cost of ownership when purchasing a new vehicle?

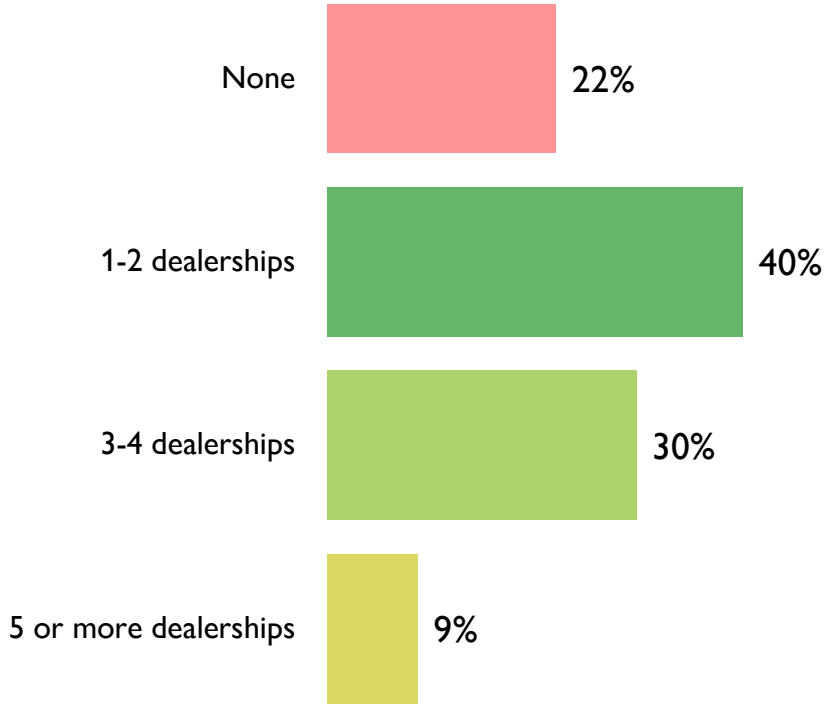
BEST GUESS: TOTAL COST OF EV VS. GAS VEHICLE

Total cost of EV vs. gas vehicle	EV Owner		Region							Type of Community			Age			
	Yes	No	BC	AB	SK/MB	ON	QC	ATL	NORTH	Urban	Suburban	Rural	18-29	30-44	45-59	60+
EV will end up much cheaper	28%	20%	26%	18%	24%	20%	22%	23%	19%	24%	19%	18%	20%	23%	22%	21%
EV will be a bit cheaper, despite a higher upfront cost	38%	34%	35%	30%	34%	34%	37%	35%	32%	34%	36%	31%	35%	34%	34%	35%
EV and comparable gas vehicle will be at par	20%	19%	18%	21%	15%	20%	20%	17%	19%	18%	20%	21%	22%	21%	18%	16%
Gas vehicle will end up a bit cheaper	9%	14%	12%	15%	15%	15%	10%	14%	13%	14%	13%	14%	16%	12%	12%	14%
Gas vehicle will end up much cheaper	6%	12%	9%	15%	12%	11%	11%	11%	17%	10%	12%	15%	7%	9%	14%	14%

Base n = 6150

How many dealerships are you willing to visit to buy an EV or a PHEV?

2 in 5 Canadians would be willing to visit 1-2 dealerships to buy an EV/PHEV, while 30% would be willing to visit 2-4.

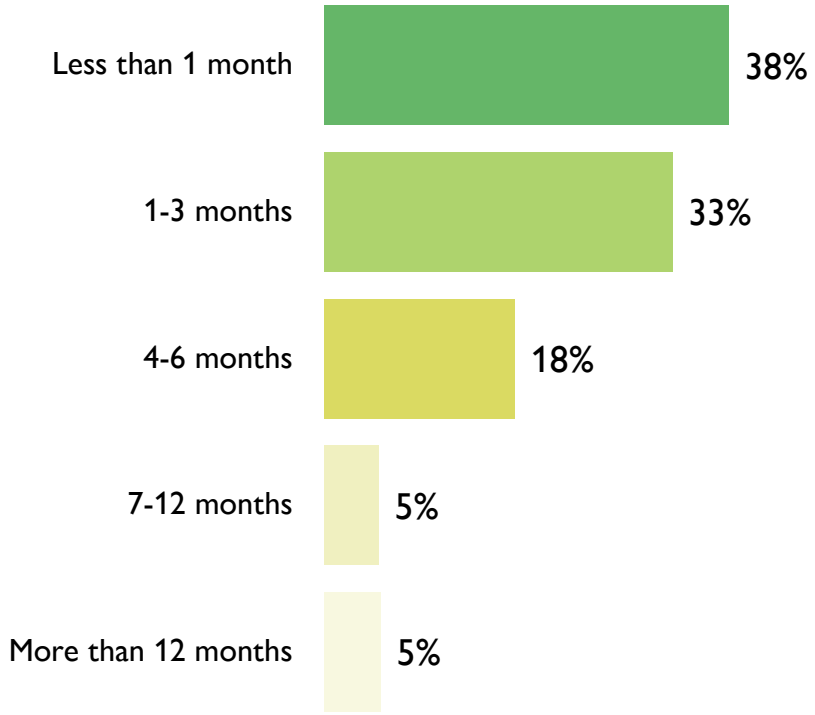


Dealerships willing to visit	EV Owner		Region							Age			
	Yes	No	BC	AB	SK/MB	ON	QC	ATL	NORTH	18-29	30-44	45-59	60+
None	5%	25%	21%	29%	28%	21%	18%	24%	30%	14%	18%	23%	29%
1 to 2	51%	38%	40%	37%	37%	40%	42%	38%	30%	44%	43%	38%	36%
3 to 4	36%	28%	32%	27%	26%	30%	31%	29%	28%	30%	31%	29%	29%
5 or more	9%	9%	7%	7%	9%	9%	9%	8%	13%	12%	8%	10%	6%

Base n = 6150

How long are you willing to wait to receive an EV or PHEV after purchase?

Nearly 2 in 5 Canadians (38%) would be willing to wait less than 1 month to wait to receive an EV/PHEV after purchase, while 33% would be willing to wait 1-3 months.

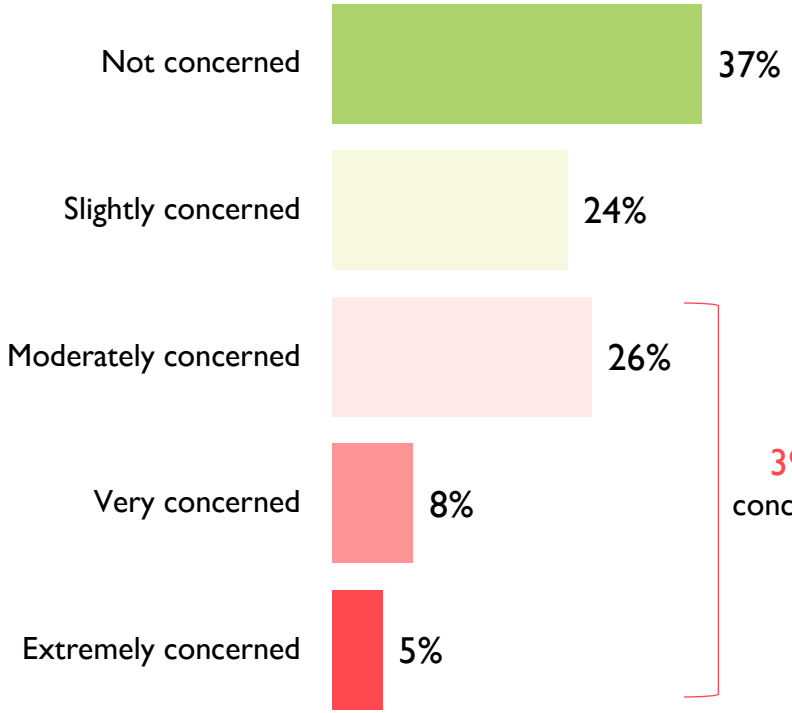


Willing to wait…	EV Owner		Region							Age			
	Yes	No	BC	AB	SK/MB	ON	QC	ATL	NORTH	18-29	30-44	45-59	60+
Less than 1 month	17%	42%	38%	48%	45%	37%	32%	44%	29%	29%	34%	43%	44%
1 to 3 months	42%	31%	36%	31%	32%	35%	30%	33%	29%	39%	34%	30%	31%
4 to 6 months	29%	16%	17%	12%	16%	18%	23%	15%	28%	23%	19%	16%	15%
7 to 12 months	9%	4%	5%	3%	3%	4%	8%	3%	8%	5%	7%	5%	4%
More than 12 months	3%	6%	3%	5%	4%	5%	8%	4%	6%	4%	6%	6%	5%

Base n = 6150

Are you concerned about the availability of EVs compared to gas vehicles?

37% of Canadians express no concern about the availability of EVs compared to gas vehicles, while 39% indicate varying levels of concern.

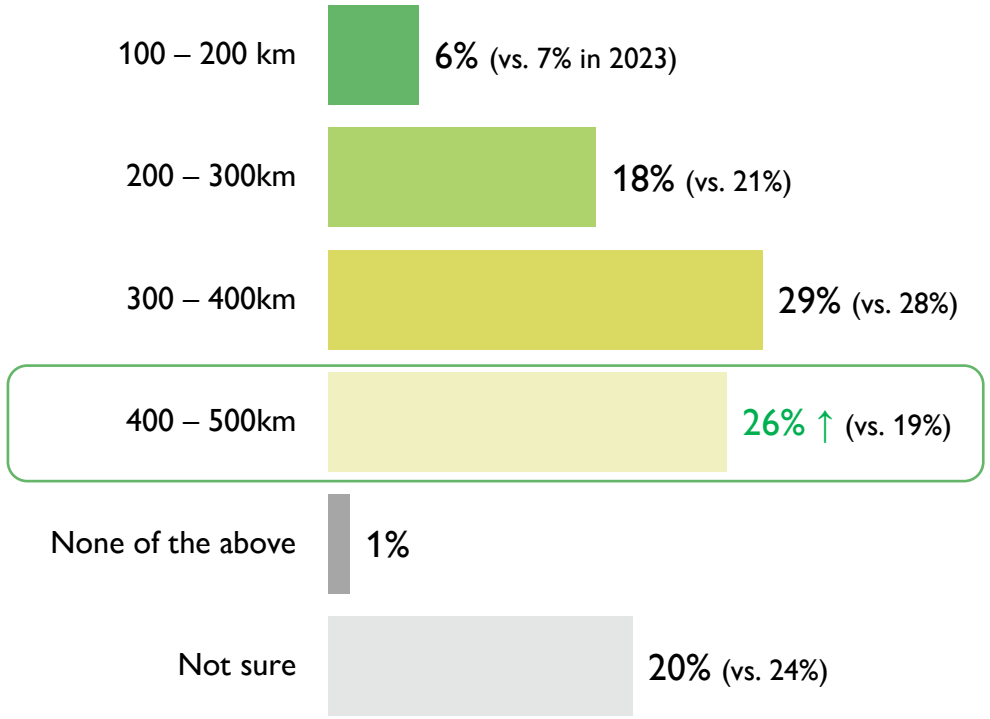


EV Owner		Region							Type of Community			Age			
Yes	No	BC	AB	SK/MB	ON	QC	ATL	NORTH	Urban	Suburban	Rural	18-29	30-44	45-59	60+
51%	37%	34%	30%	33%	41%	47%	34%	50%	41%	40%	34%	42%	43%	39%	34%

Base n = 6150

What is the average range of most new electric vehicles?

The majority of Canadians are unaware of the average range of new EVs, with only 1 in 4 knowing that it falls between 400 and 500 kilometers.



Base n = 6150

What is the average range of most new electric vehicles?

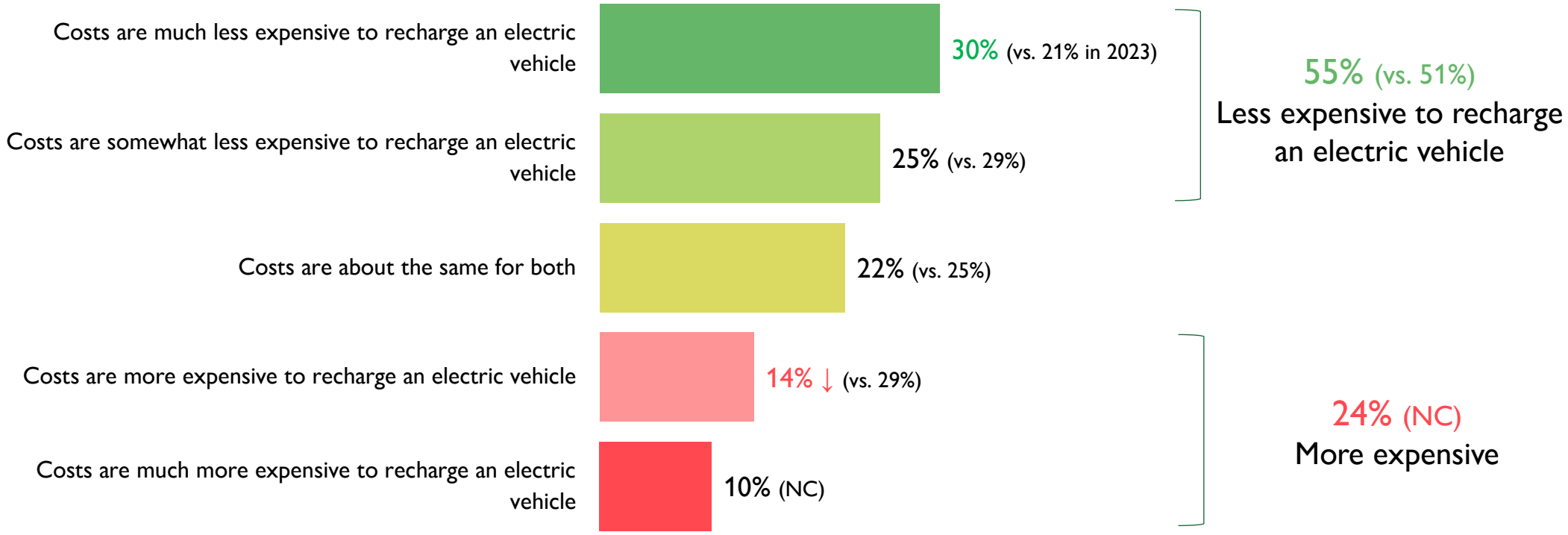
BEST GUESS: RANGE OF NEW EVs

Range of new EVs	EV Owner		Region							Age			
	Yes	No	BC	AB	SK/MB	ON	QC	ATL	NORTH	18-29	30-44	45-59	60+
100 to 200 km	5%	6%	5%	6%	7%	6%	6%	6%	2%	7%	7%	6%	4%
200 to 300 km	22%	17%	17%	16%	17%	17%	21%	15%	16%	22%	17%	16%	17%
300 to 400 km	35%	27%	30%	28%	24%	29%	30%	25%	44%	27%	30%	27%	29%
400 to 500 km	29%	26%	25%	28%	28%	26%	25%	29%	24%	23%	24%	28%	29%
None of these	1%	1%	2%	1%	2%	1%	2%	2%	0%	2%	2%	1%	1%
Not sure	8%	22%	20%	21%	21%	22%	15%	22%	14%	19%	20%	22%	20%

Base n = 6150

Do you believe that charging an electric vehicle at home is more or less expensive than filling up a gas vehicle at the station?

55% of Canadians believe that it is less expensive to recharge an EV at home than filling up a gas vehicle at the station.



Base n = 6150

Do you believe that charging an electric vehicle at home is more or less expensive than filling up a gas vehicle at the station?

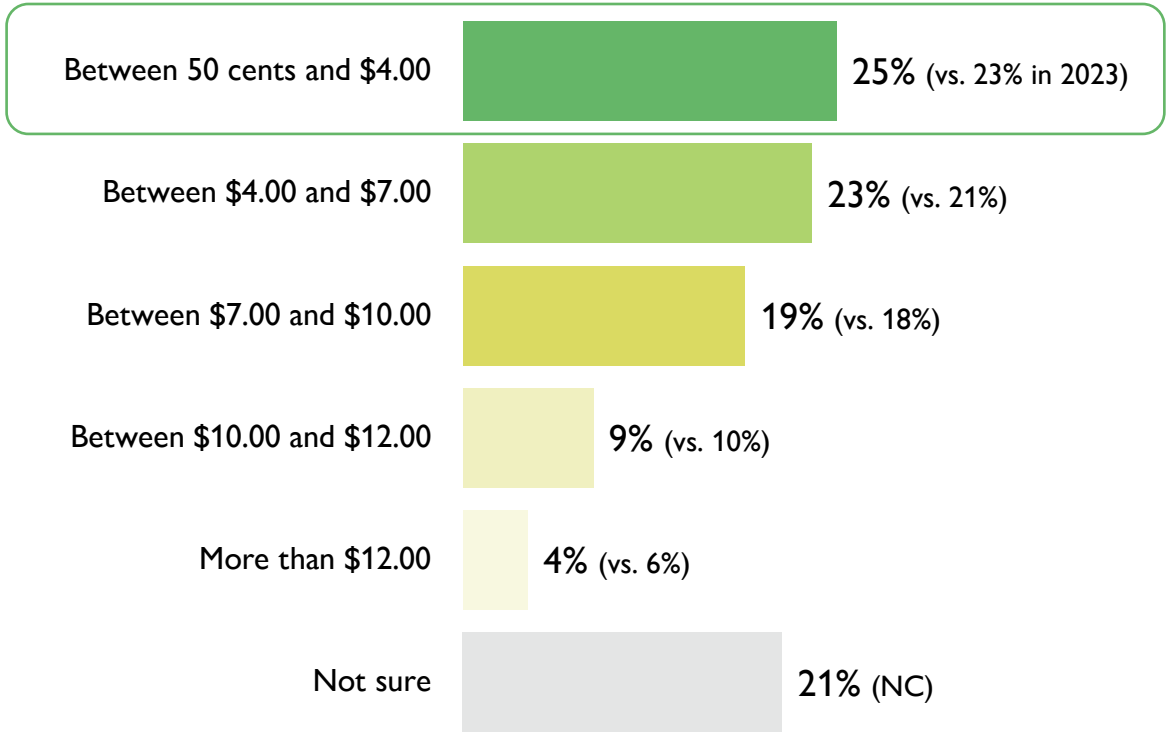
PERCEIVED COST OF FUELING AN EV VS. A GAS VEHICLE

Perceived cost of fueling an EV vs. a gas vehicle	EV Owner		Region							Type of Community			Age			
	Yes	No	BC	AB	SK/MB	ON	QC	ATL	NORTH	Urban	Suburban	Rural	18-29	30-44	45-59	60+
Costs are much more expensive to recharge an EV	12%	10%	8%	12%	11%	10%	10%	10%	18%	10%	8%	13%	11%	12%	10%	8%
Costs are more expensive to recharge an EV	19%	13%	12%	17%	15%	15%	10%	11%	11%	14%	14%	13%	19%	15%	11%	10%
Costs are about the same for both	19%	22%	23%	19%	20%	22%	21%	22%	26%	21%	22%	23%	24%	25%	22%	17%
Costs are somewhat less expensive to recharge an EV	20%	26%	22%	29%	26%	27%	20%	27%	23%	24%	26%	23%	22%	21%	24%	30%
Costs are much less expensive to recharge an EV	30%	30%	34%	23%	28%	26%	39%	31%	21%	31%	30%	28%	24%	27%	33%	34%

Base n = 6150

At $1.50/L, a gas car that does 8L/100km will cost approximately $12 to drive 100km. When charging at home, how much will a comparable electric car cost to drive 100km in any of the 10 provinces?

1 in 4 Canadians are aware that it costs between 50 cents and $4.00 to drive an EV 100 km.



Base n = 6150

At $1.50/L, a gas car that does 8L/100km will cost approximately $12 to drive 100km. When charging at home, how much will a comparable electric car cost to drive 100km in any of the 10 provinces?

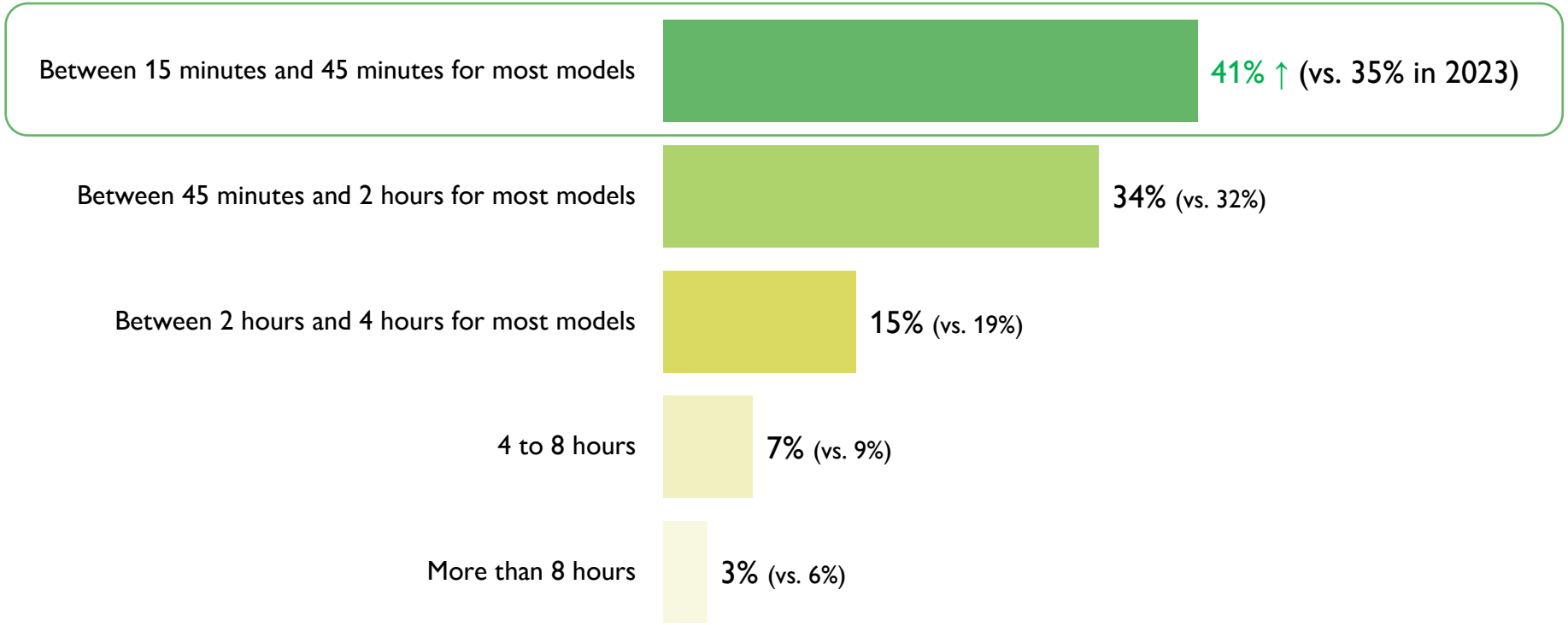
BEST GUESS: COST OF DRIVING AN EV 100 KM

Cost of driving an EV 100 KM	EV Owner		Region							Age			
	Yes	No	BC	AB	SK/MB	ON	QC	ATL	NORTH	18-29	30-44	45-59	60+
Between $0.50 and $4.00	27%	24%	28%	21%	27%	21%	29%	27%	33%	19%	24%	28%	26%
Between $4.00 an $7.00	24%	23%	21%	24%	23%	22%	25%	22%	17%	24%	21%	22%	24%
Between $7.00 and $10.00	24%	18%	19%	16%	18%	21%	17%	17%	18%	22%	23%	15%	15%
Between $10.00 and $12.00	12%	8%	8%	10%	7%	9%	8%	9%	6%	12%	10%	8%	6%
More than $12.00	5%	4%	3%	6%	5%	5%	3%	5%	12%	5%	4%	4%	4%
Not sure	9%	23%	21%	23%	21%	22%	18%	19%	15%	17%	17%	23%	26%

Base n = 6150

How long does it take to charge most new EVs using a superfast charger from 20% to 80%?

2 in 5 Canadians are aware that it would take most new EVs 15 to 45 minutes to charge from 20% to 80%.



Base n = 6150

How long does it take to charge most new EVs using a superfast charger from 20% to 80%?

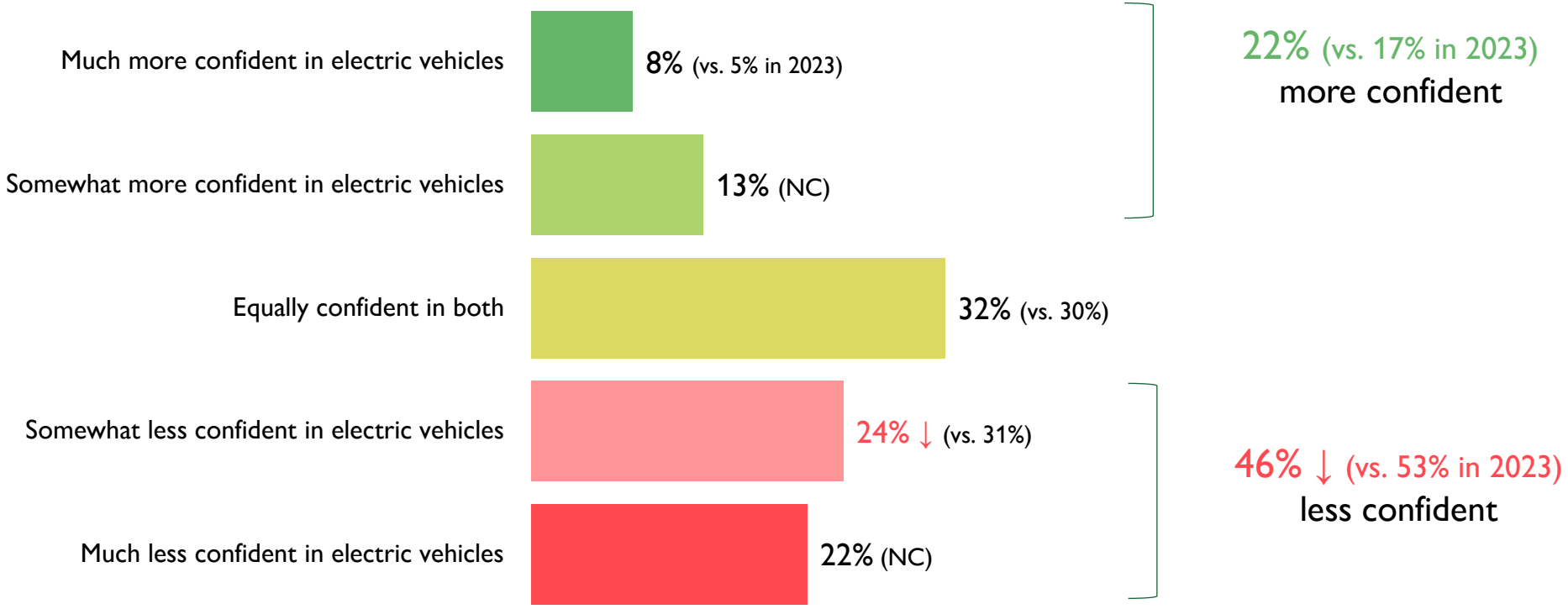
BEST GUESS: TIME TO CHARGE AN EV USING A SUPERFAST CHARGER

Time to charge an EV using a superfast charger	Region							Age			
	BC	AB	SK/MB	ON	QC	ATL	NORTH	18-29	30-44	45-59	60+
15 to 45 minutes	44%	38%	41%	38%	47%	44%	36%	37%	38%	43%	46%
45 minutes to 2 hours	35%	33%	33%	34%	33%	32%	33%	37%	35%	31%	32%
2 to 4 hours	14%	16%	16%	17%	12%	15%	18%	17%	16%	14%	13%
4 to 8 hours	5%	8%	6%	8%	7%	7%	11%	6%	8%	7%	6%
More than 8 hours	3%	5%	4%	4%	2%	3%	2%	3%	3%	5%	2%

Base n = 6150

How confident are you in the reliability and longevity of electric vehicles?

More than two in five Canadians (46%) express less confidence in the reliability of electric vehicles compared to gas vehicles, while one in four (22%) are more confident. This marks a 5-point increase in EV confidence since August 2023.



Base n = 6150

How confident are you in the reliability and longevity of electric vehicles?

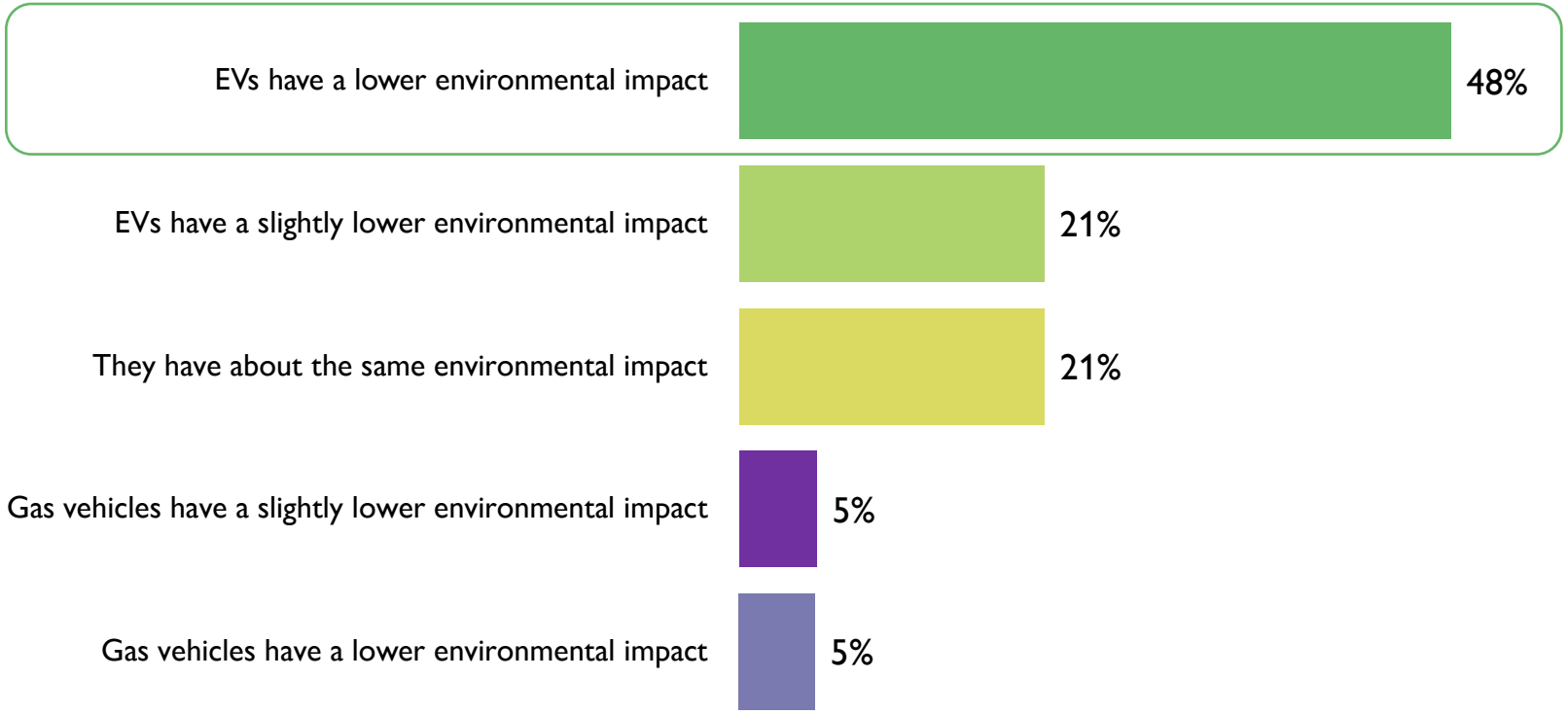
LEVEL OF CONFIDENCE IN EV RELIABILITY AND LONGEVITY

Level of confidence in EV reliability and longevity	EV Owner		Region							Type of Community			Age			
	Yes	No	BC	AB	SK/MB	ON	QC	ATL	NORTH	Urban	Suburban	Rural	18-29	30-44	45-59	60+
Much less confident in EVs	9%	24%	20%	31%	28%	20%	17%	27%	31%	18%	22%	34%	16%	18%	23%	28%
Somewhat less confident in EVs	18%	26%	26%	25%	28%	24%	23%	25%	21%	25%	24%	23%	26%	21%	25%	26%
Equally confident in both	38%	31%	29%	26%	26%	34%	38%	28%	22%	33%	34%	28%	32%	36%	34%	29%
Somewhat more confident in EVs	18%	13%	15%	12%	13%	14%	12%	13%	14%	15%	13%	10%	16%	15%	12%	12%
Much more confident in EVs	17%	6%	9%	6%	5%	8%	9%	7%	12%	10%	6%	6%	10%	11%	7%	5%

Base n = 6150

What do you know about the environmental impact of an EV vs a gas vehicle? (Please select one option)

1 in 2 Canadians (48%) believe EVs have a lower environmental impact when compared to gas vehicles, while 21% believe they have a slightly lower impact.



Base n = 6150

What do you know about the environmental impact of an EV vs a gas vehicle? (Please select one option)

BEST GUESS: ENVIRONMENTAL IMPACT OF EVs VS. GAS VEHICLES

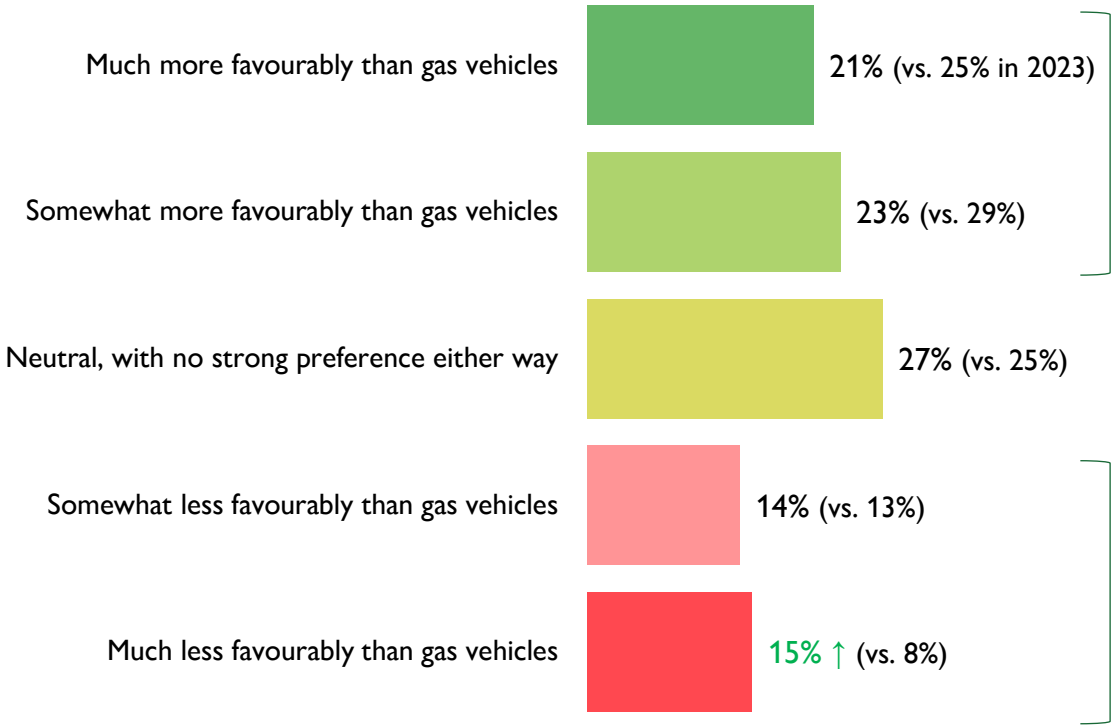
Environmental impact	EV Owner		Region							Type of Community			Age			
	Yes	No	BC	AB	SK/MB	ON	QC	ATL	NORTH	Urban	Suburban	Rural	18-29	30-44	45-59	60+
EVs have a lower environmental impact	44%	49%	48%	47%	51%	50%	44%	54%	38%	52%	45%	43%	16%	18%	23%	28%
EVs have a slightly lower environmental impact	21%	21%	22%	21%	19%	20%	21%	19%	20%	20%	22%	18%	26%	21%	25%	26%
They have about the same environmental impact	22%	21%	20%	20%	19%	20%	24%	17%	22%	19%	23%	22%	32%	36%	34%	29%
Gas vehicles have a slightly lower environmental impact	8%	5%	5%	6%	5%	5%	5%	5%	10%	5%	5%	8%	16%	15%	12%	12%
Gas vehicles have a lower environmental impact	5%	5%	5%	6%	5%	4%	6%	6%	9%	4%	5%	8%	10%	11%	7%	5%

Base n = 6150

Reassessing Purchase Intent

After receiving the previous information about electric vehicles, how do you generally view electric vehicles in comparison to gas vehicles?

44% of Canadians have a more favourable impression of EVs compared to gas vehicles, while 29% note that they view them less favourably.



44% ↓ (vs. 54%)
more favourably

EV Owner		Region							Type of Community			Age			
Yes	No	BC	AB	SK/MB	ON	QC	ATL	NORTH	Urban	Suburban	Rural	18-29	30-44	45-59	60+
55%	42%	47%	38%	42%	44%	47%	40%	39%	47%	42%	37%	40%	45%	42%	48%

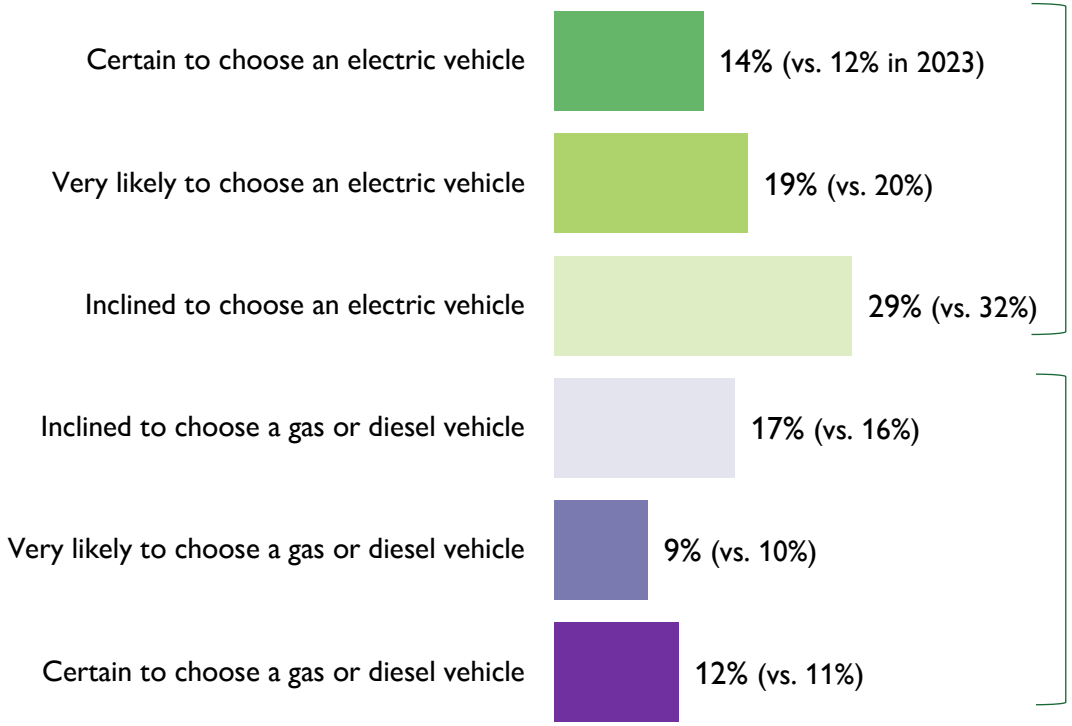
29% ↑ (vs. 21%)
less favourably

EV Owner		Region							Type of Community			Age			
Yes	No	BC	AB	SK/MB	ON	QC	ATL	NORTH	Urban	Suburban	Rural	18-29	30-44	45-59	60+
26%	30%	25%	37%	31%	28%	28%	31%	31%	26%	29%	39%	34%	29%	27%	28%

Base n = 6150

Taking into consideration the information provided to you, when thinking about your next vehicle purchase, which will you choose?

After learning about EVs, 62% of Canadians consider leaning towards purchasing one for their next vehicle. This inclination is especially notable among Quebec residents (68%), urban dwellers (66%), and younger Canadians aged 18-29 (67%) and 30-44 (69%).



62% (vs. 63% in 2023) leaning towards an EV

EV Owner		Region							Type of Community			Age			
Yes	No	BC	AB	SK/MB	ON	QC	ATL	NORTH	Urban	Suburban	Rural	18-29	30-44	45-59	60+
82%	58%	63%	53%	54%	63%	68%	53%	51%	66%	61%	47%	67%	69%	58%	55%

38% (vs. 37% in 2023) leaning towards gas/diesel

EV Owner		Region							Type of Community			Age			
Yes	No	BC	AB	SK/MB	ON	QC	ATL	NORTH	Urban	Suburban	Rural	18-29	30-44	45-59	60+
18%	42%	37%	47%	46%	37%	32%	47%	49%	34%	39%	53%	33%	31%	42%	45%

Base n = 6150

Taking into consideration the information provided to you, when thinking about your next vehicle purchase, which will you choose?

After receiving information about EVs, there was a 14-point increase in the intent to purchase an EV.

Among Non-EV Owners	Before	After	Variation
Certain to choose an electric vehicle	8.29%	11.55%	3.26
Very likely to choose an electric vehicle	13.31%	16.40%	3.09
Inclined to choose an electric vehicle	22.65%	29.97%	7.32
Inclined to choose a gas vehicle	21.65%	18.90%	-2.75
Very likely to choose a gas vehicle	15.56%	9.54%	-6.02
Certain to choose a gas vehicle	18.53%	13.64%	-4.89

+13.66
inclined to choose an EV
(vs. +20.37 in 2023)

-13.66
inclined to choose a gas vehicle
(vs. -20.38 in 2023)

Base n = 5336; those who do not currently own an EV or PHEV

Respondent Profile

RESPONDENT PROFILE

REGION	
BC	14%
AB	12%
SK/MB	7%
ON	39%
QC	23%
ATL	6%
NORTH	0%
GENDER	
Male	49%
Female	51%
AGE GROUP	
18 to 29	20%
30 to 44	25%
45 to 59	27%
60 and over	28%
EDUCATION	
HS or less	31%
College	37%
University	32%

What best describes your employment status?	
Permanent full-time	41%
Self-employed	7%
Full-time contract that is renewed	2%
Provide services on a freelance basis	1%
Employed part-time	10%
Student	5%
Retired	22%
Unemployed	6%
Stay at home	4%
Other	2%
What best describes the sector you are currently employed in?	
Arts, cultural, sports, entertainment, and recreation	4%
Construction	8%
Health care or educational services	15%
Hospitality, accommodation, and tourism	4%
Logistics, transportation, or warehousing	5%
Manufacturing	8%
Natural resources	1%
Not for profits/charities	1%
Personal services	5%
Professional, scientific, or financial services	10%
Retail	12%
Technology	10%
Wholesale trade	2%
Other	15%

RESPONDENT PROFILE

Including yourself, how many people live in your household?	
Average	2.6
Do you have children in the following age ranges	
I do not have children	33%
Under 2	5%
3 to 4	4%
5 to 8	7%
9 to 11	6%
12 to 14	6%
15 to 17	7%
18 and older	23%
How would you describe your marital status?	
Married / Domestic Partner	52%
Widowed	4%
Divorced	8%
Separated	4%
Single / Never Married	33%
Which of the following best describes your annual household income (before taxes)?	
Less than $50k	36%
$50k to $100k	36%
Over $100k	22%
Which best describes the place where you live?	
Urban	49%
Suburban	36%
Rural	15%
Are you a member of a visible minority/racialized community?	
Yes	20%
No	80%

Do you own or rent your home?	
Own	51%
Rent	41%
Live with family	8%
Which best describes the residential property that you live in?	
Single detached house	50%
Condo / strata / apartment	31%
Semidetached house	8%
Row or townhouse	8%
Mobile home/structure	2%
Other	1%
Where do you typically park your vehicle overnight?	
In a driveway	35%
In a garage on my property	25%
On a private lot (e.g., at an apartment complex)	13%
In the street	7%
In a parking garage	6%
In a parking lot (e.g., at work, shopping center)	2%
Other	1%
Not applicable	10%
Where do you typically park your vehicle during the day?	
In a driveway	32%
In a garage on my property	16%
In a parking lot (e.g., at work, shopping center)	15%
On a private lot (e.g., at an apartment complex)	11%
In the street	8%
In a parking garage	6%
Other	1%
Not applicable	11%

Thank You

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