

June 27, 2024

**ELECTRIC
MOBILITY
CANADA**

ACCELERATING ELECTRIC
TRANSPORTATION



**MOBILITÉ
ÉLECTRIQUE
CANADA**

ACCÉLÉRER L'ÉLECTRIFICATION
DES TRANSPORTS

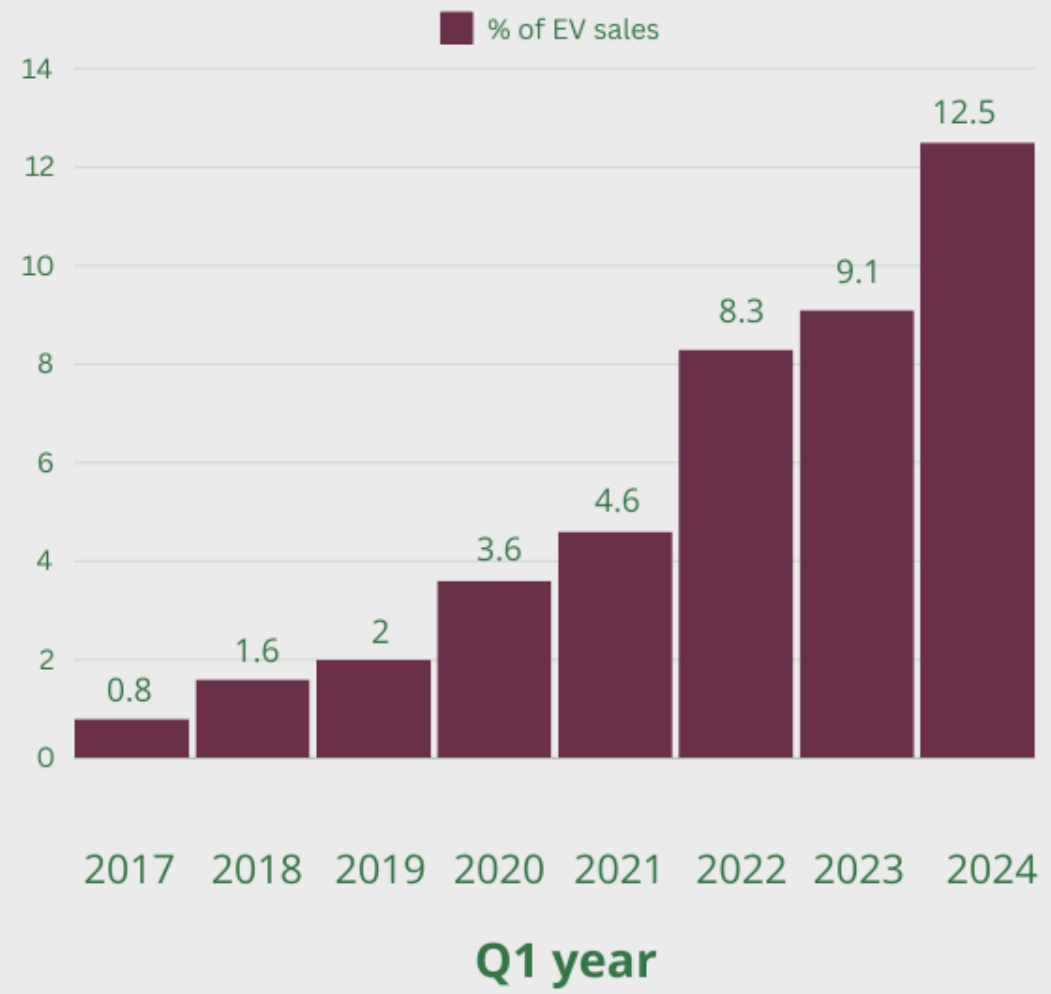
ZEV sales data for Q1 2024

+

May 2024 Abacus poll highlights

Q1 Canadian ZEV sales 2017-2024

A glance at Q1 ZEV sales growth from 2017 to 2024



- Fifteen fold increase between Q1 2017 and Q1 2024
- 37% growth in ZEV sales percentage between Q1 2023 and Q1 2024
- 53% growth in absolute ZEV sales between Q1 2023 and Q1 2024
- If ZEV sales percentage grows by 27% (instead of 37%) in Q1 2025 and Q1 2026, Canada will surpass its 20% 2026 ZEV sales target BEFORE the end of 2026

Number of public charging stations in Canada – June 2024

2025 targets

11,584
station locations

Fast chargers: 4300

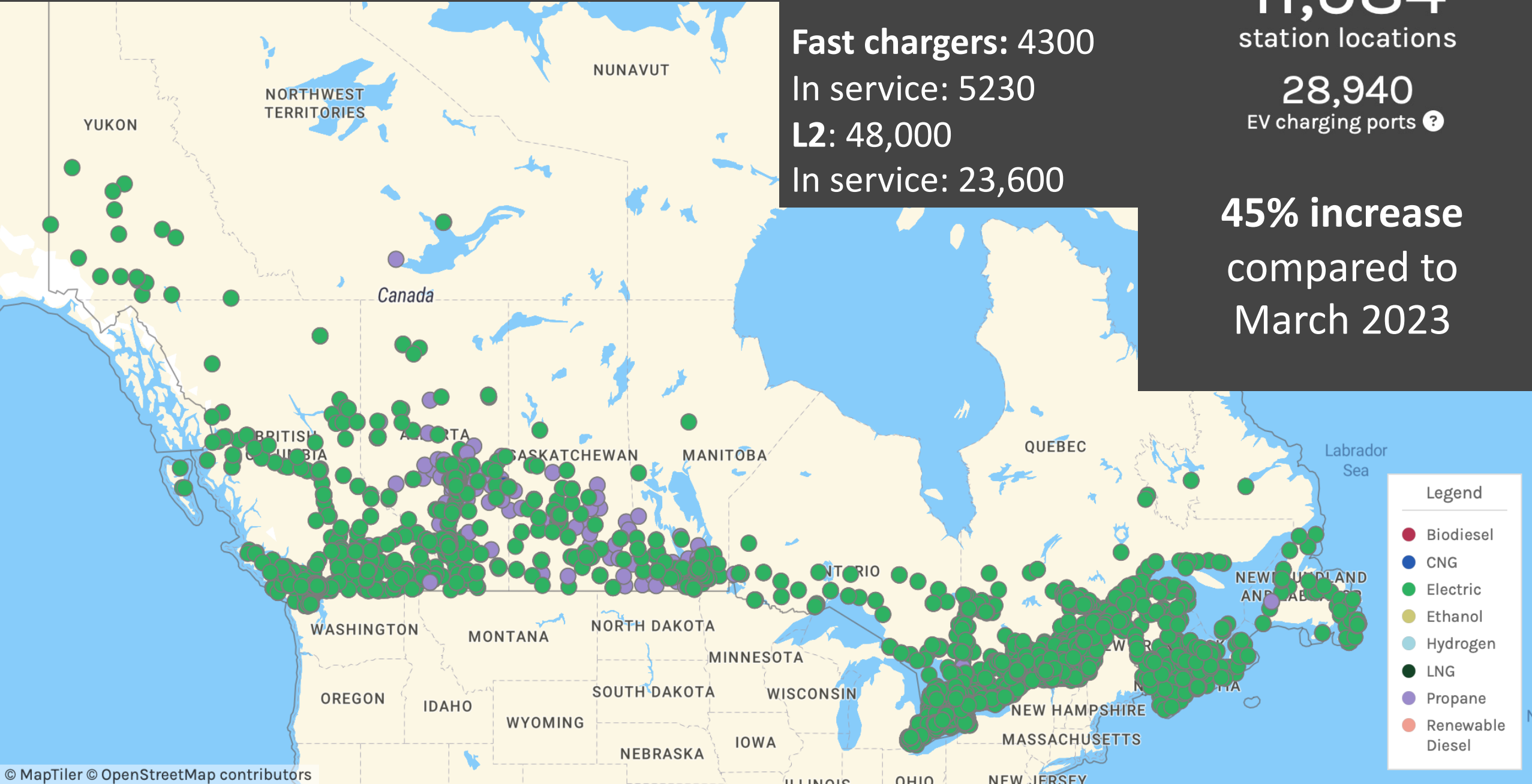
28,940
EV charging ports ?

In service: 5230

L2: 48,000

In service: 23,600

45% increase
compared to
March 2023



Canada's Light Duty ZEV fleet: Approx. 700,000
Québec's Light Duty ZEV fleet: Approx. 300,000

Québec represents:

- Approx. 42% of the Canadian ZEV fleet
- Approx. 40% of the Canadian public chargers
- Approx. 33% of the Canadian fast chargers

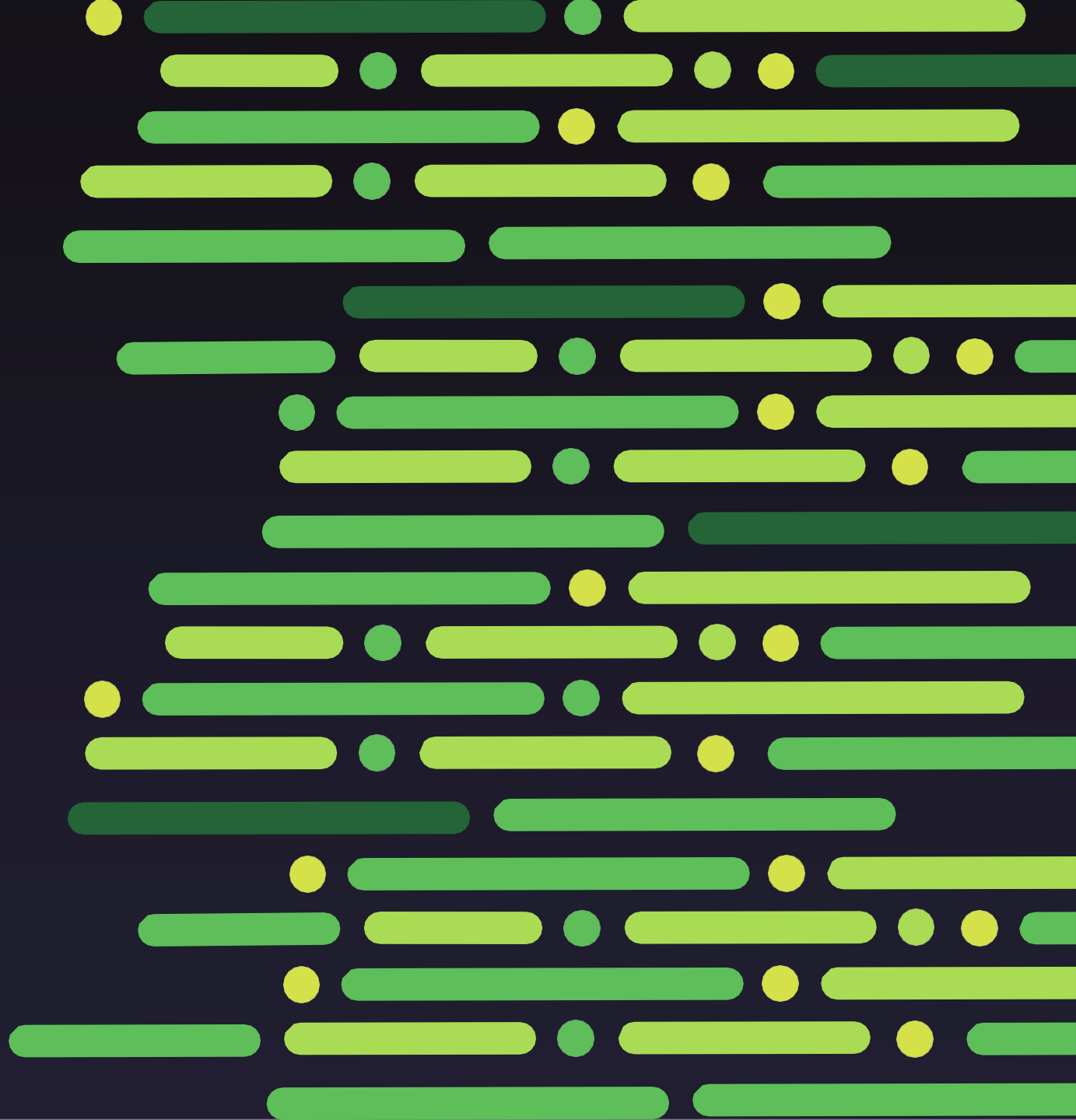


Powering Up: Perceptions of Electric Vehicles

For Electric Mobility Canada

NATIONAL REPORT
HIGHLIGHTS

May 2024



Methodology

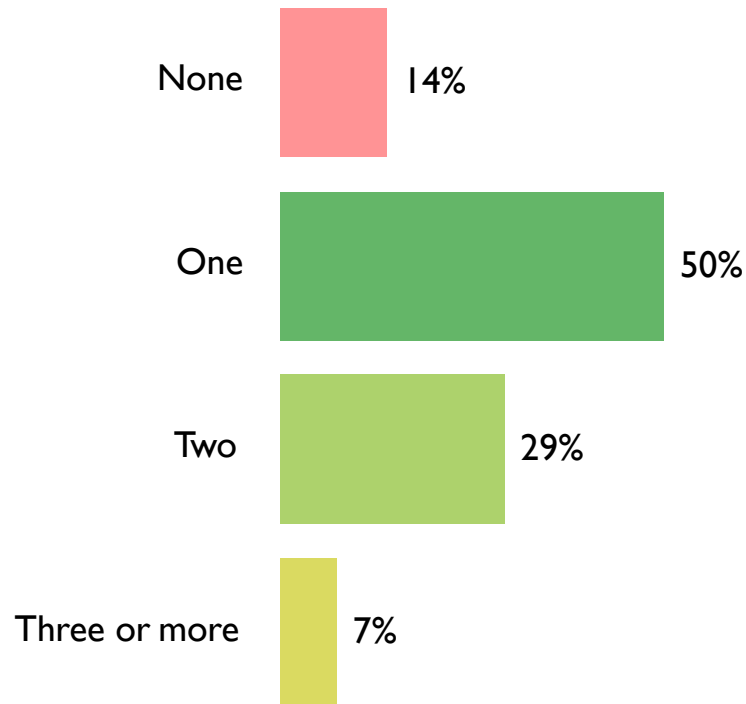
- Sample: n = 6,150 adult Canadians.
- Margin of error: $\pm 1.25\%$, 19 times out of 20.
- Online data collection (EN and FR) from May 7 to 24, 2024.
- The data was weighted by age, gender, education and region.
- Totals may not add up to 100 due to rounding.
- Throughout the report % indicates a significantly 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.





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%

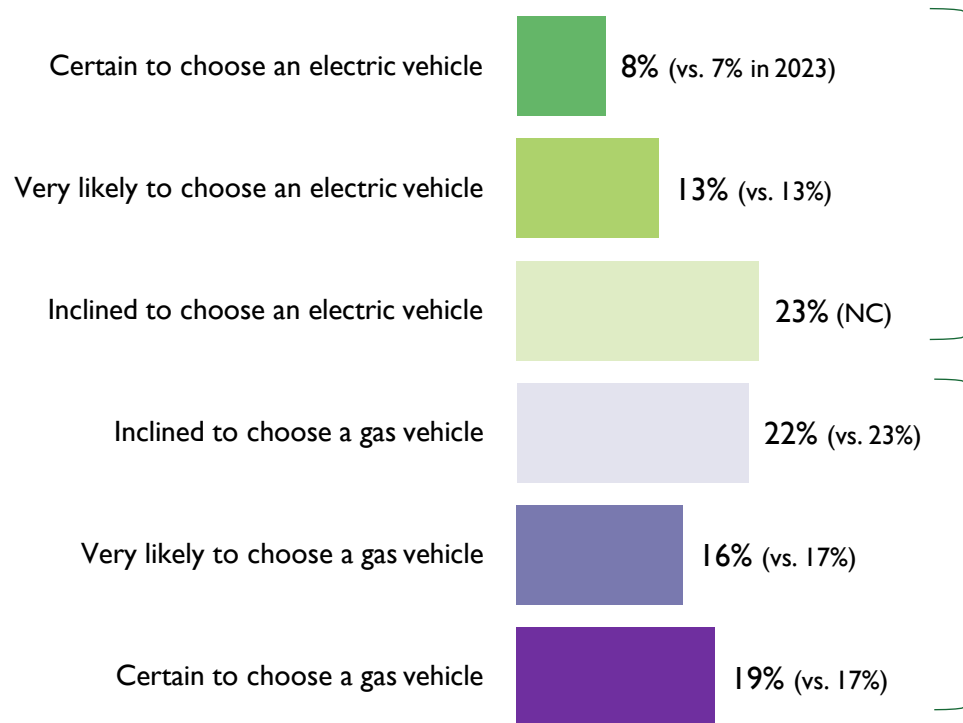
Base n = 6150





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

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

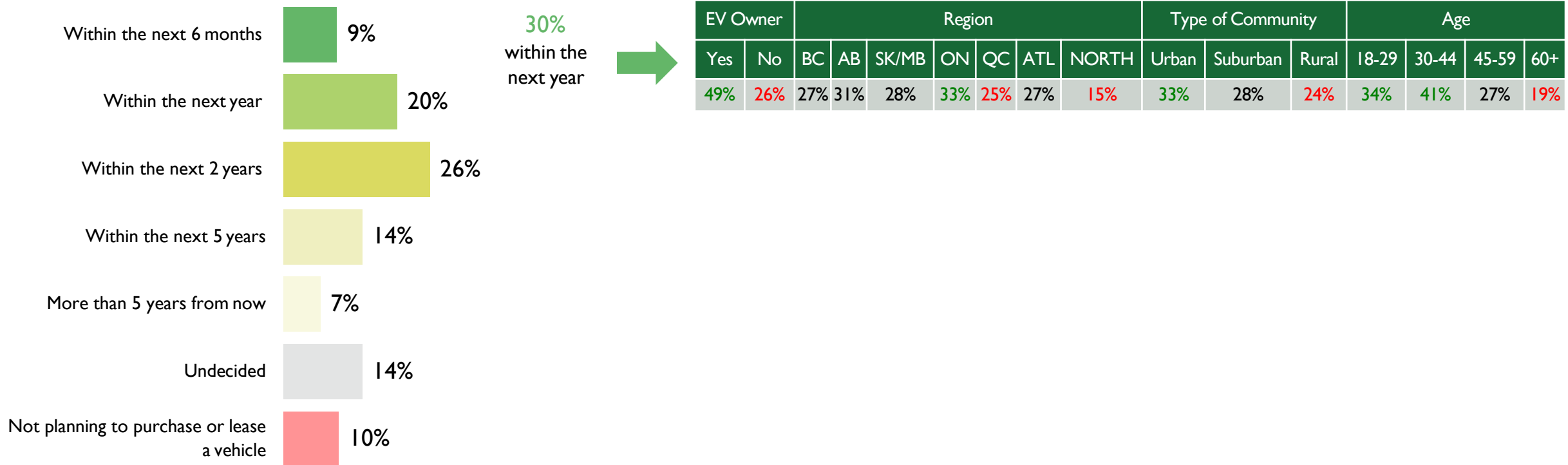
Region							Type of Community			Age			
BC	AB	SK/MB	ON	QC	ATL	NORTH	Urban	Suburban	Rural	18-29	30-44	45-59	60+
50%	66%	65%	55%	49%	66%	71%	51%	56%	69%	53%	49%	56%	62%

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%).

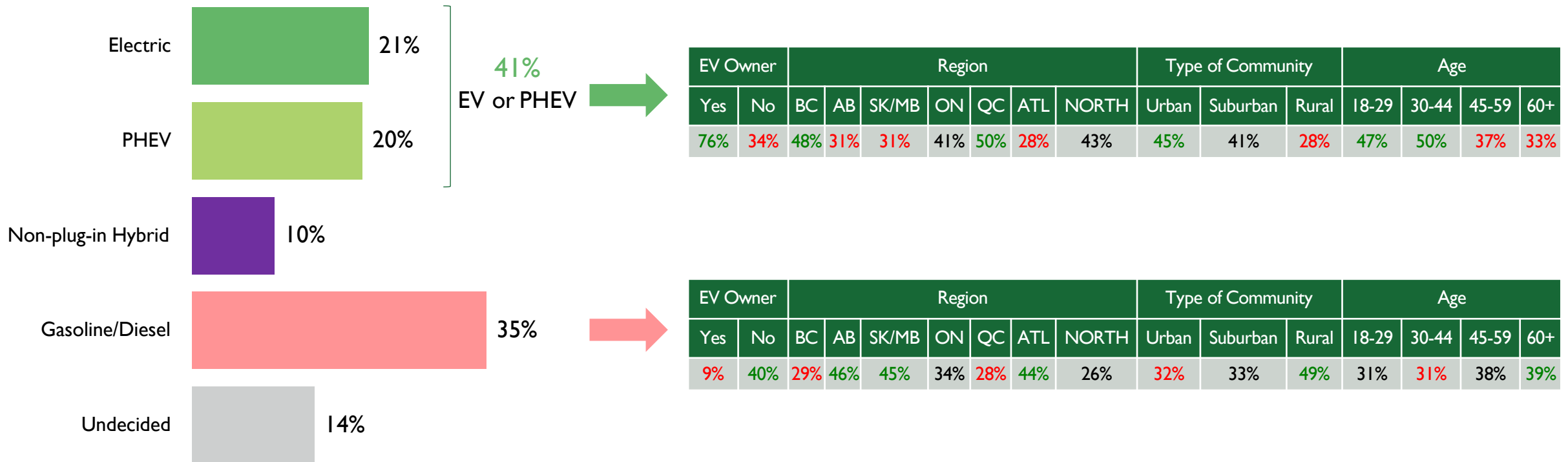


Base n = 6150



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.



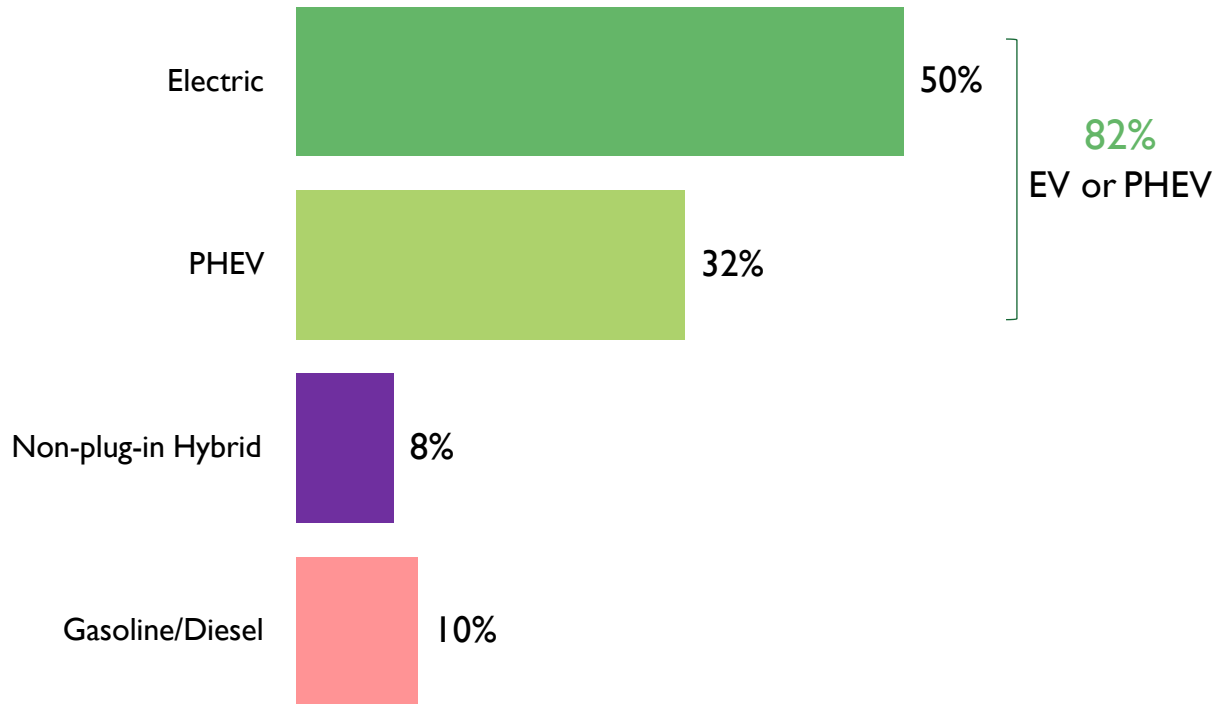
Base n = 5567; those who plan to purchase or lease a vehicle at some point





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

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



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%

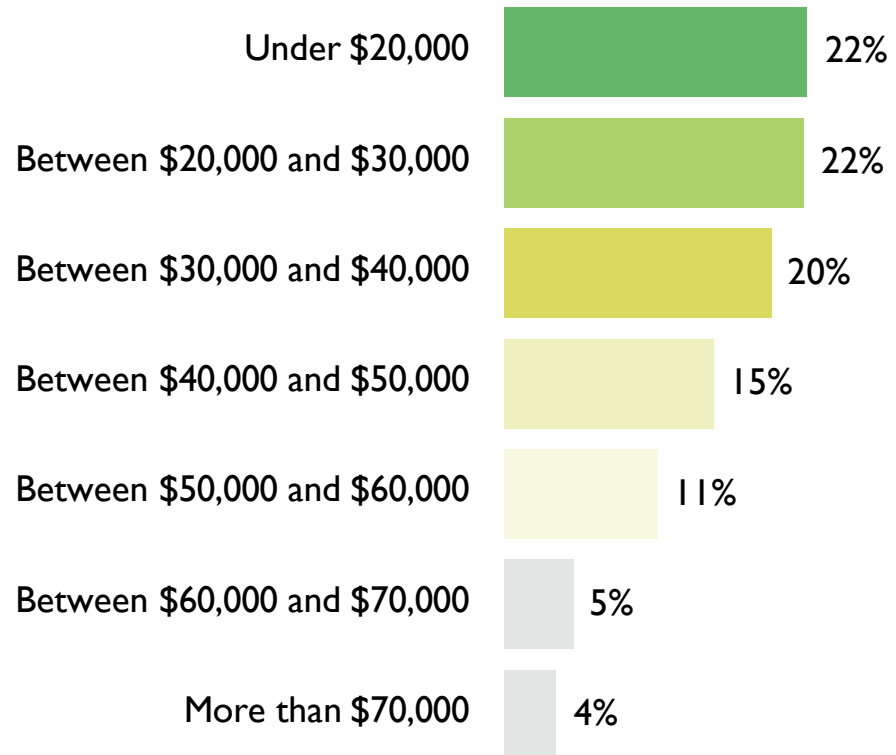
Base n = 732; current EV owners who plan to purchase or lease a vehicle at some point; excludes those who are undecided





What is your budget for your next vehicle?

64% of Canadians anticipate spending less than \$40,000 on their next vehicle



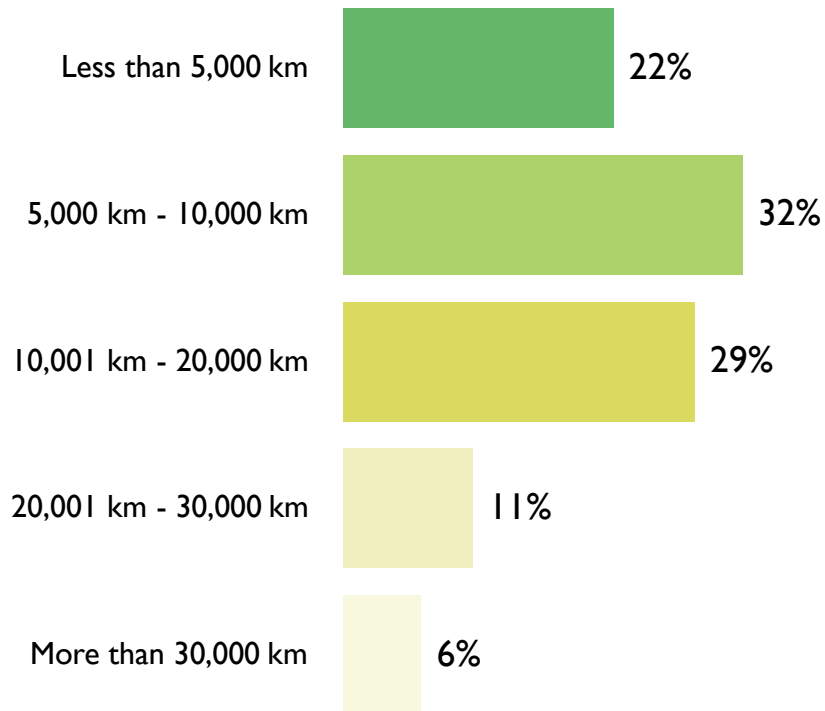
Base n = 6150





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





The average annual mileage of Canadians in 2019 was 15,300 km/year). This represents a 20% decrease compared to year 2000.

Average distance travelled in 2019

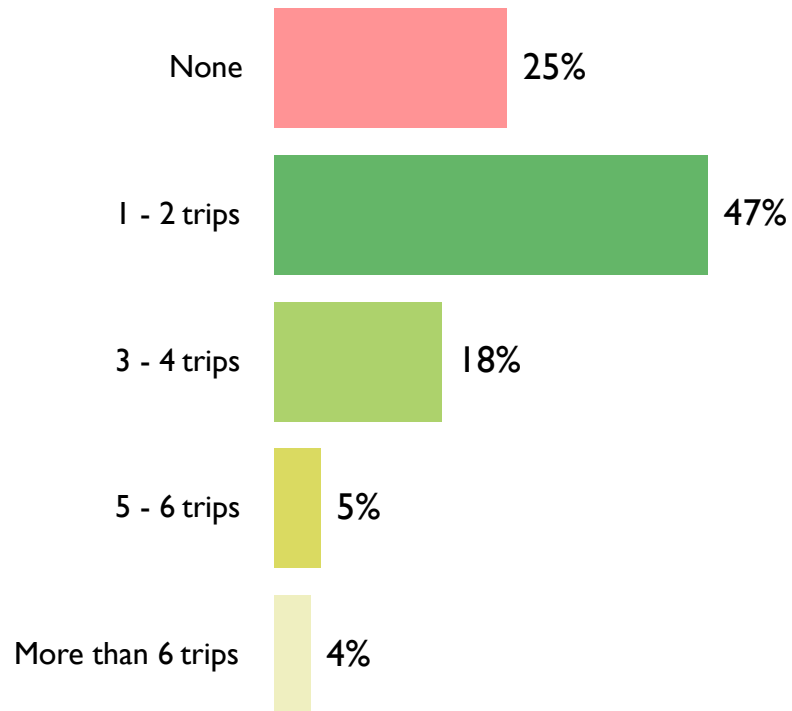
	Cars	Passenger trucks
Canada	14,729 km	15,985 km
Alberta	12,595 km	12,972 km
British-Columbia / Colombie-Britannique	11,593 km	13,441 km
Manitoba	17,730 km	17,675 km
New-Brunswick/ Nouveau-Brunswick	15,517 km	16,412 km
Newfoundland / Terre-Neuve	18,678 km	19,655 km
Nova-Scotia / Nouvelle-Écosse	21,063 km	22,200 km
Ontario	16,698 km	17,535 km
Prince Edward Island / Ile du Prince Édouard	14,512 km	15,439 km
Québec	13,041 km	15,060 km
Saskatchewan	16,733 km	17,484 km





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%

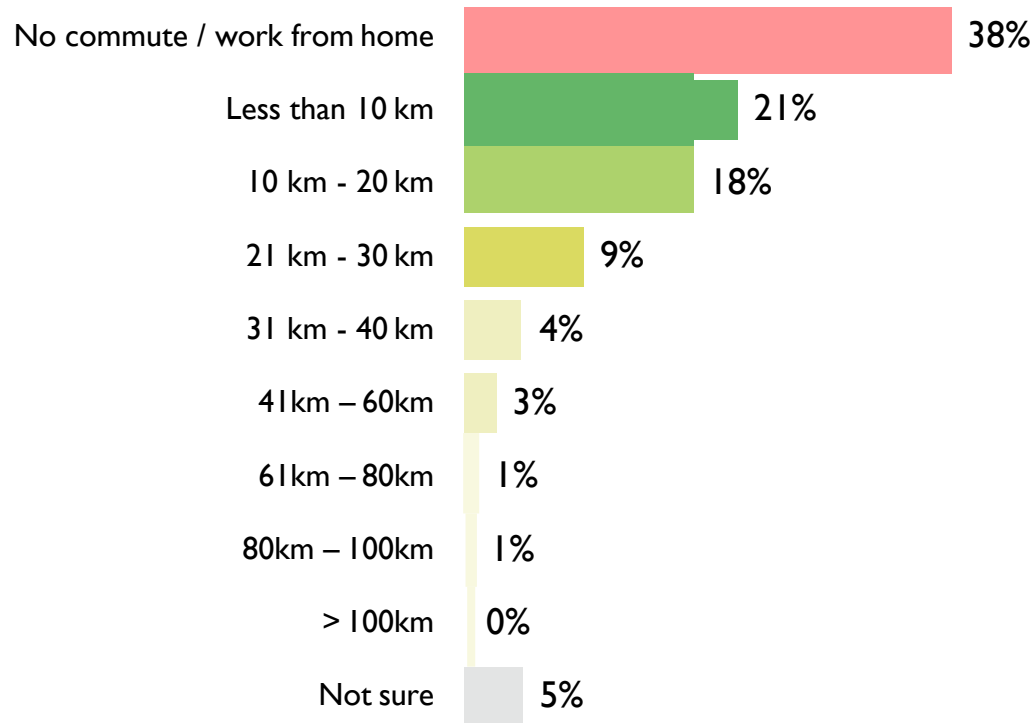
Base n = 6150





How 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%

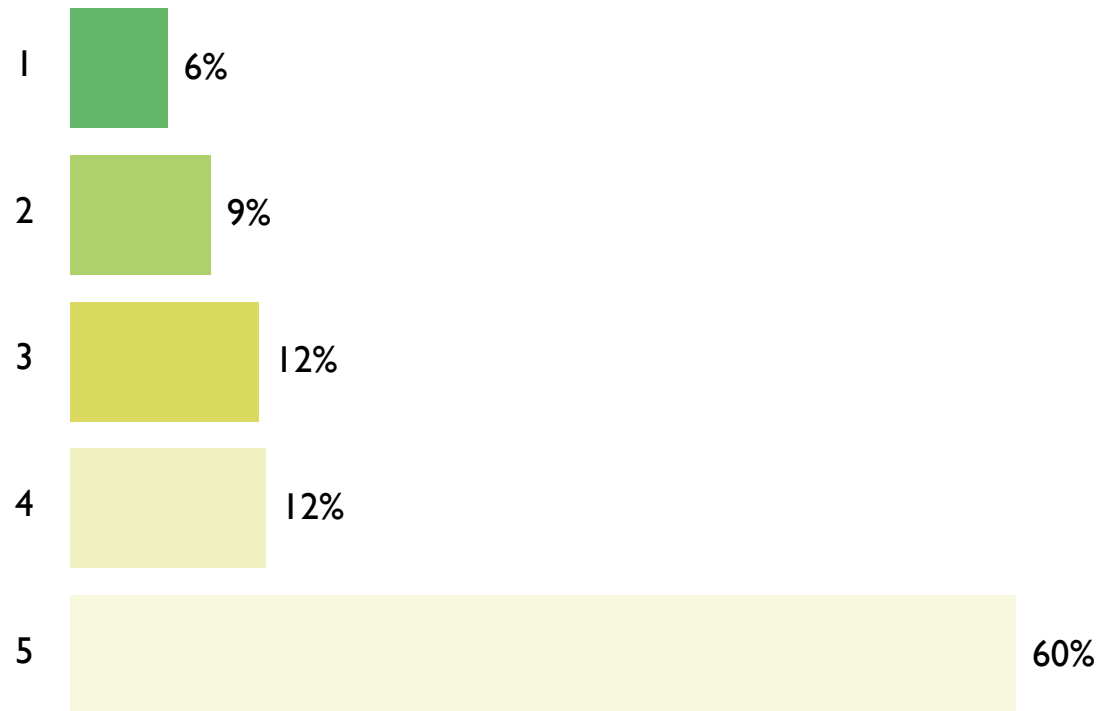
Base n = 6150





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.



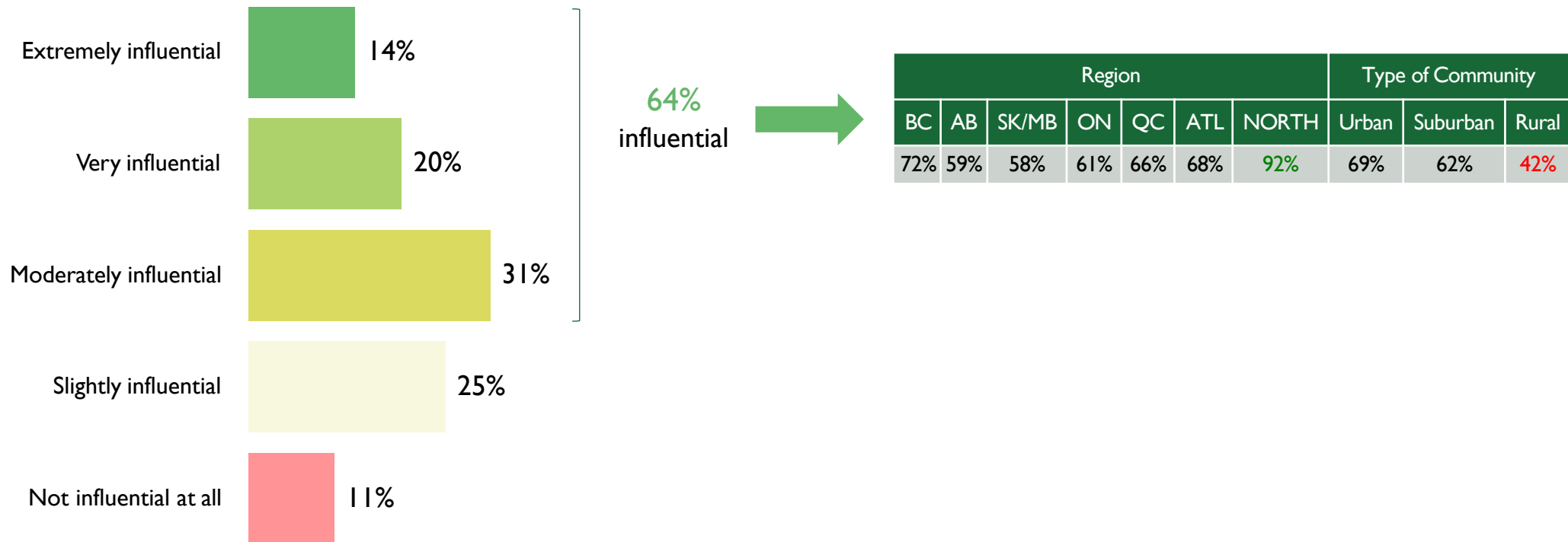
Base n = 3707; those who commute





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

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



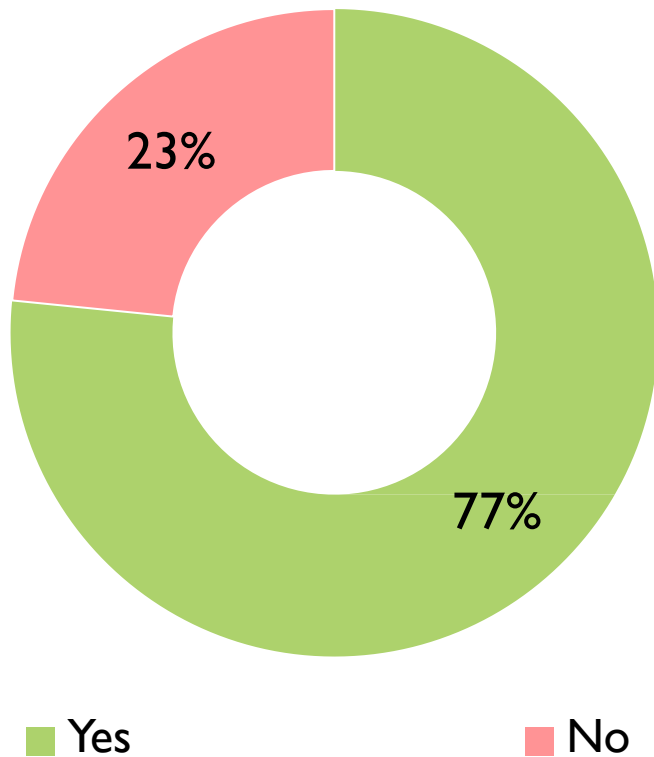
Base n = 814; those who own an EV or PHEV





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

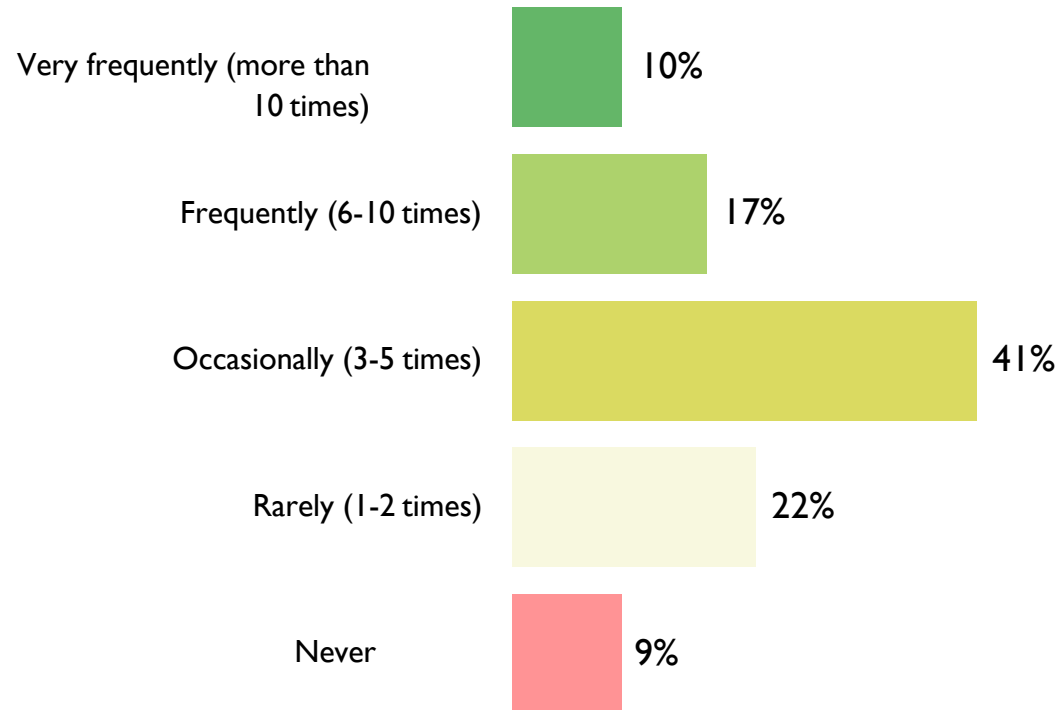




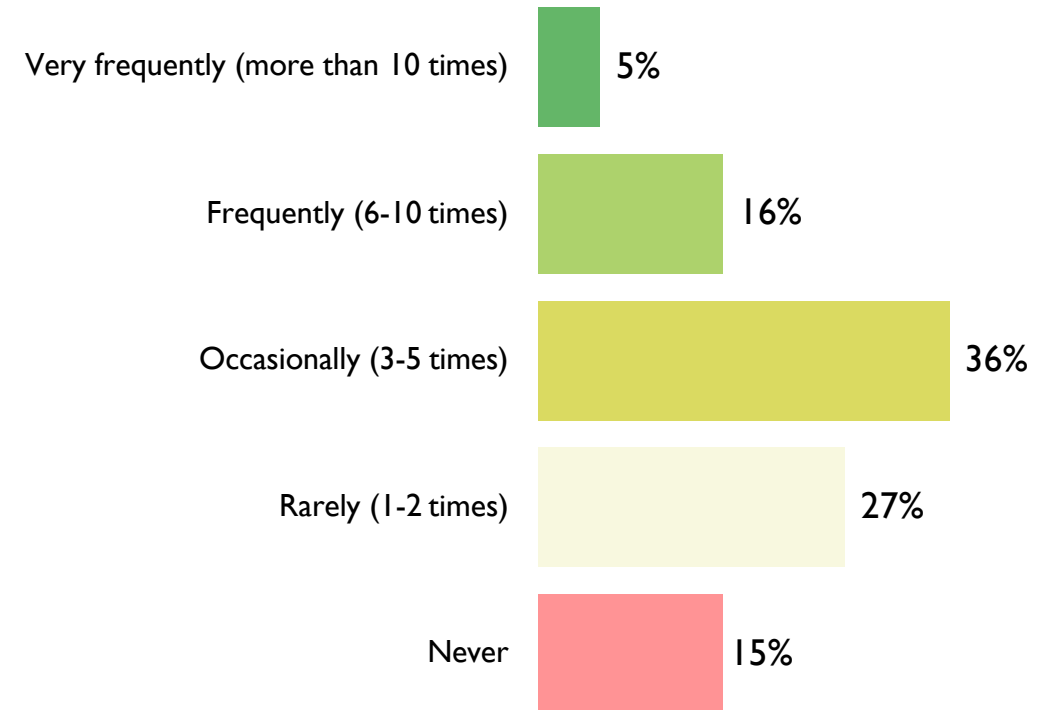
How often have you used a public fast charger in the last year?
How often have you used a public L2 charger in the last year?

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.

PUBLIC FAST CHARGERS



PUBLIC L2 CHARGERS



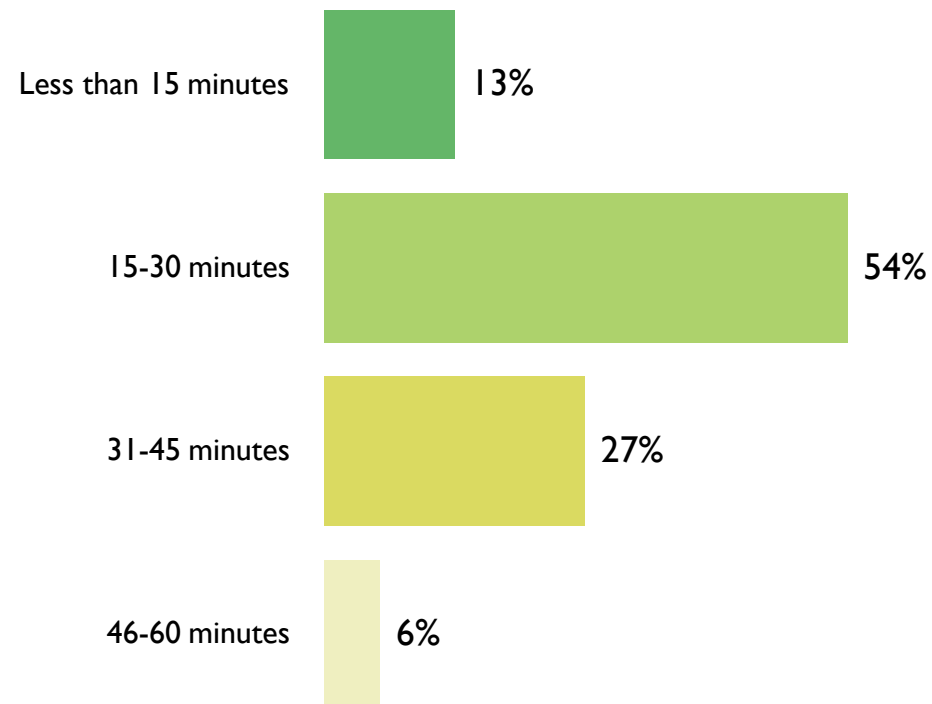
Base n = 814; those who own an EV or PHEV





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.



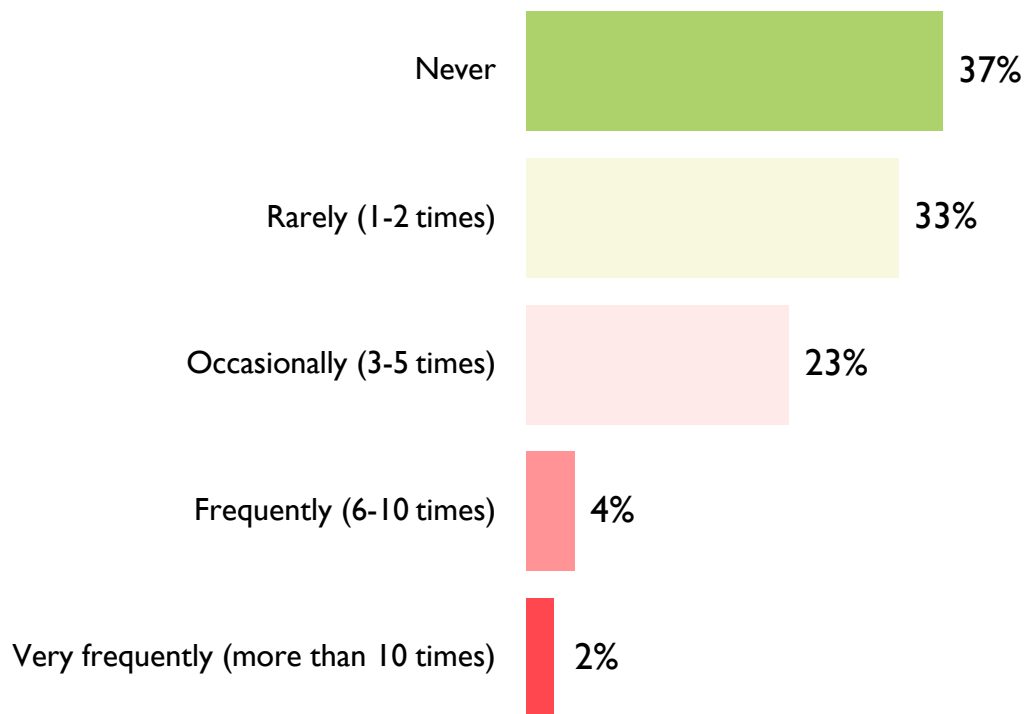
Base n = 814; those who own an EV or PHEV





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%

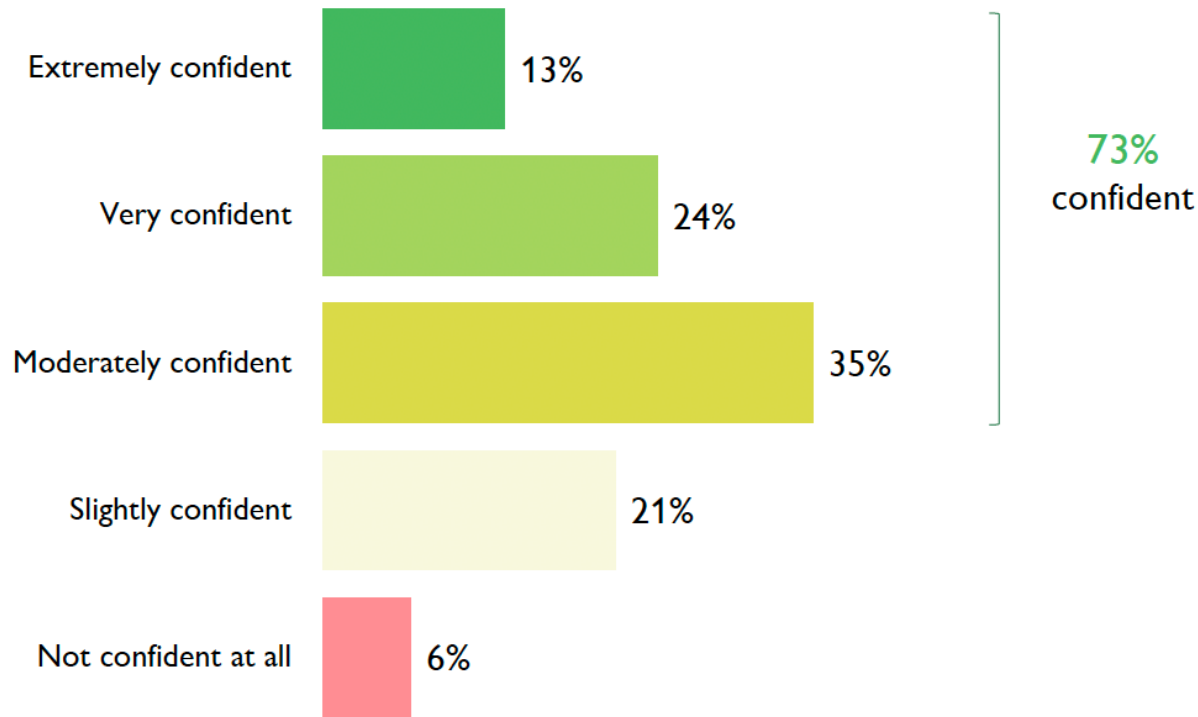
Base n = 814; those who own an EV or PHEV





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.



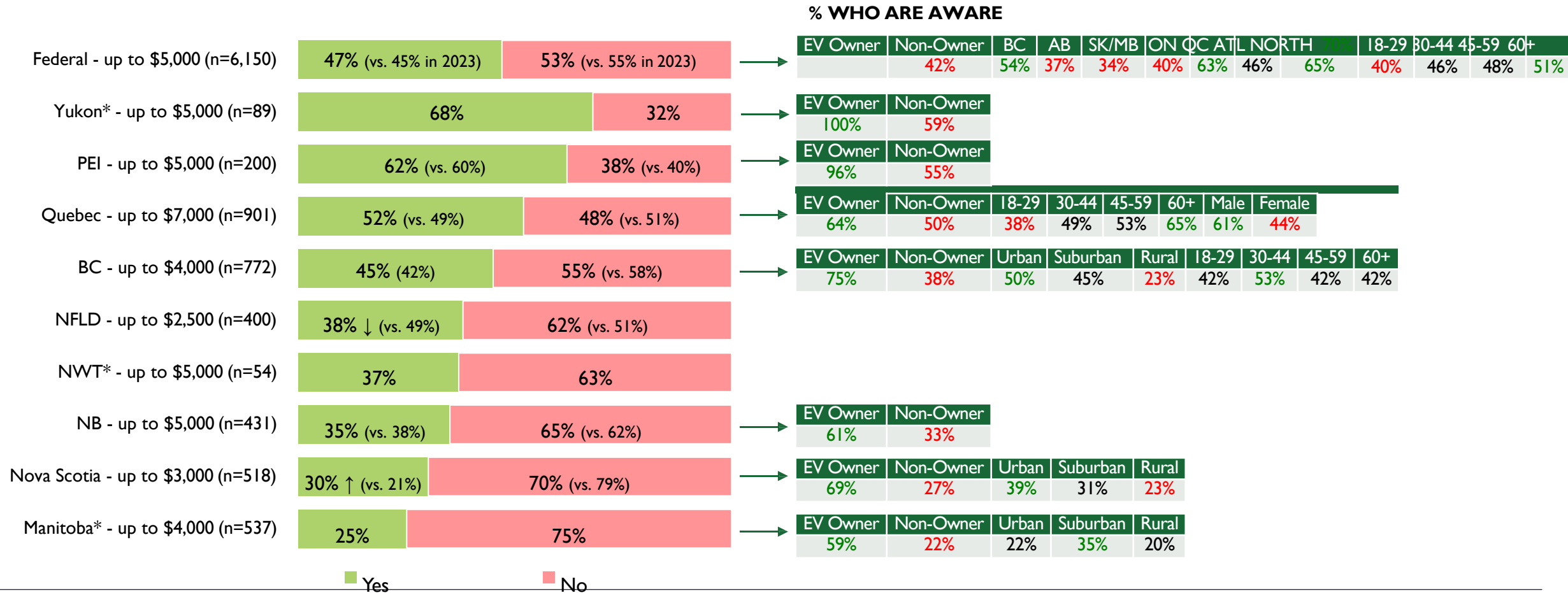
Base n = 814; those who own an EV or PHEV





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

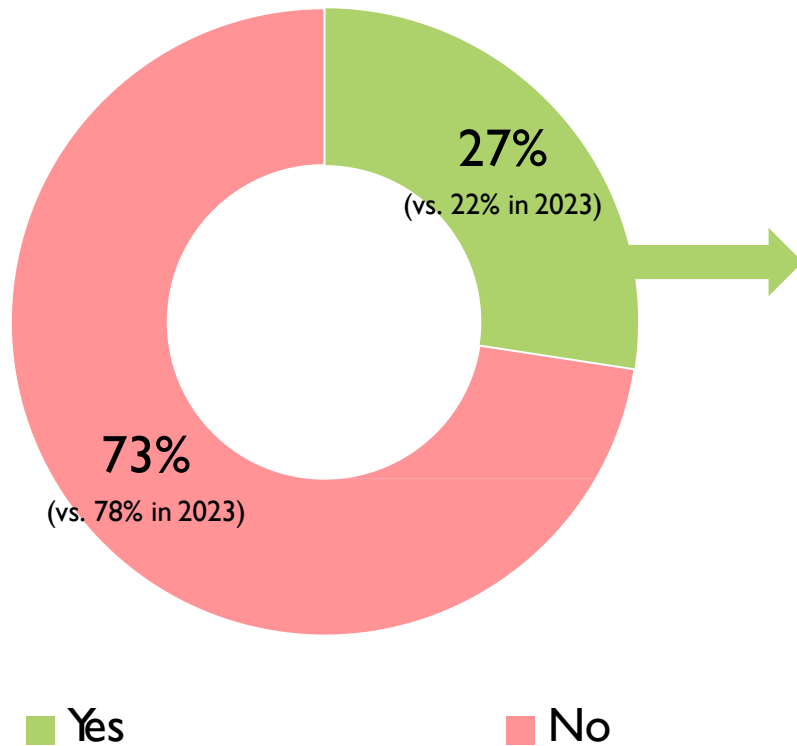


*Not applicable in 2023



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%

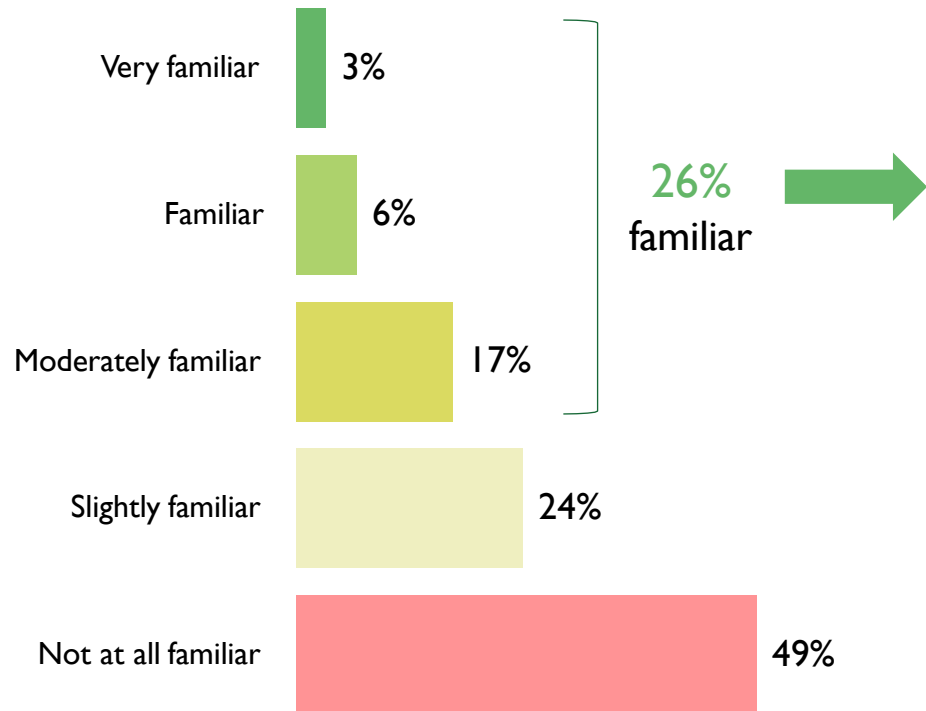
Base n = 6150





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%).



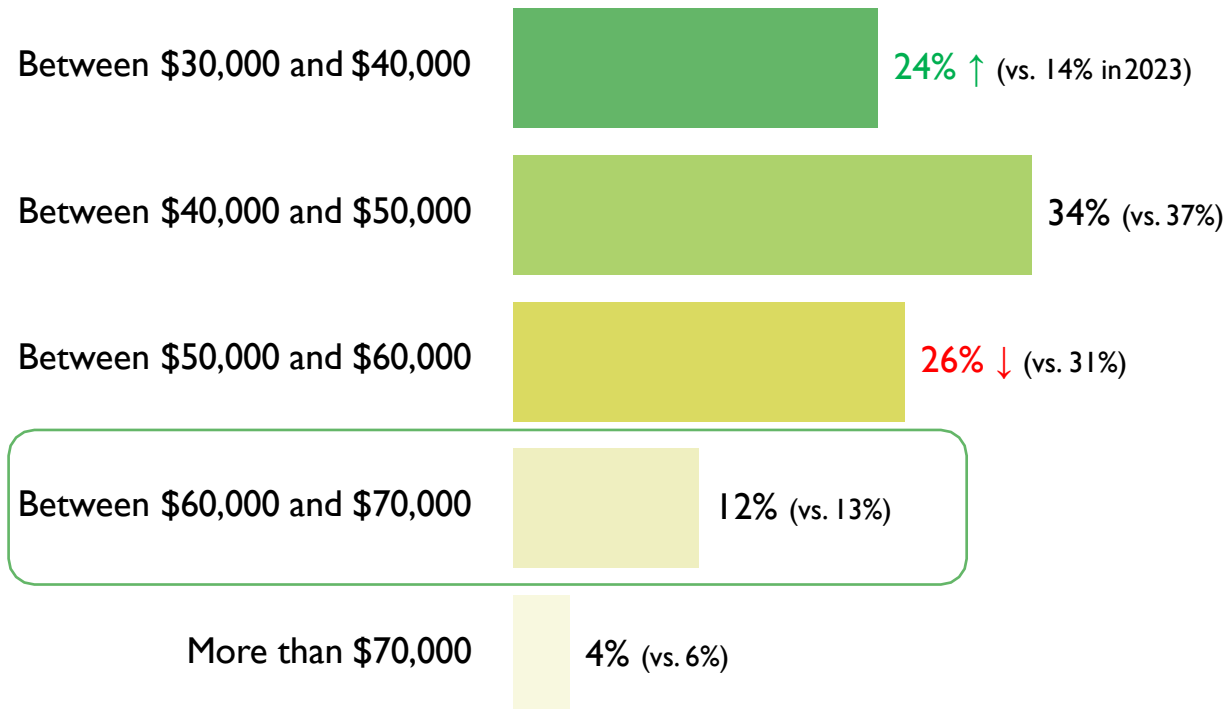
EV Owner		Region							Type of Community			Age			
Yes	No	BC	AB	SK/MB	ON	QC	ATL	NORTH	Urban	Suburban	Rural	18-29	30-44	45-59	60+
51%	22%	31%	20%	16%	26%	32%	20%	46%	28%	28%	19%	35%	35%	25%	14%

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

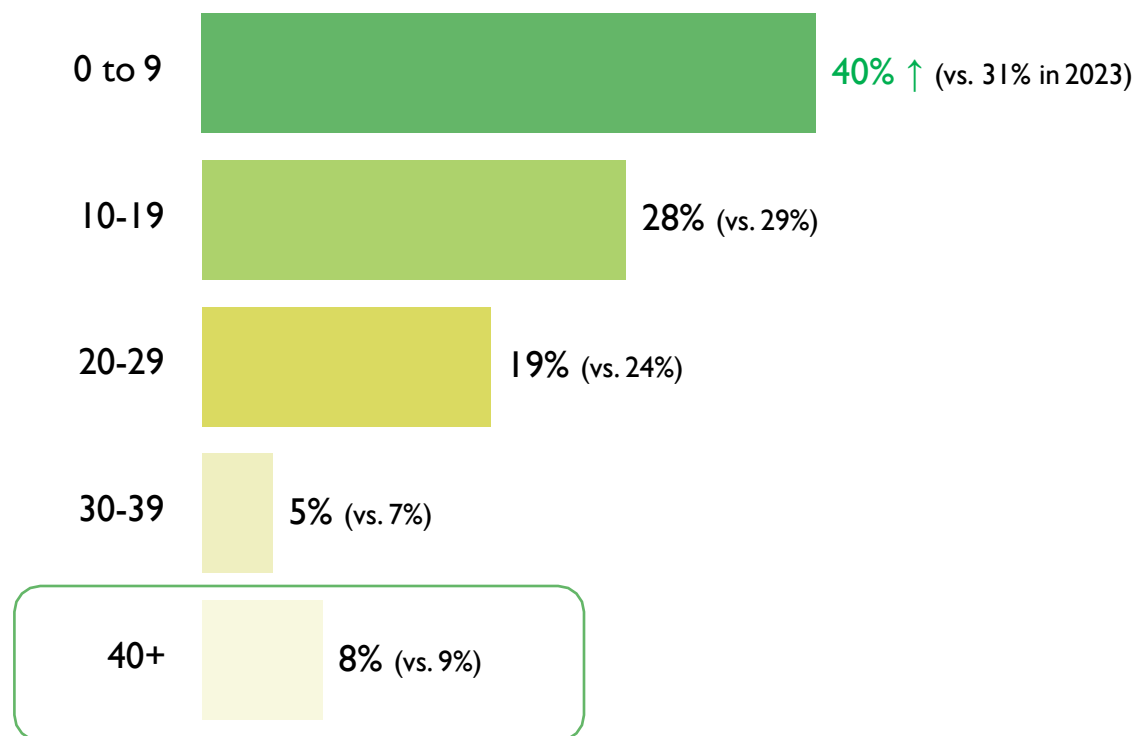
*2023 question phrased as follows: In June 2023, what was the average purchase price for a new passenger vehicle (e.g., car, SUV, pickup truck, minivan) in Canada, according to Auto Trader?





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 50 EVs and PHEVs available below the average price of a new vehicle in Canada (\$66,400)

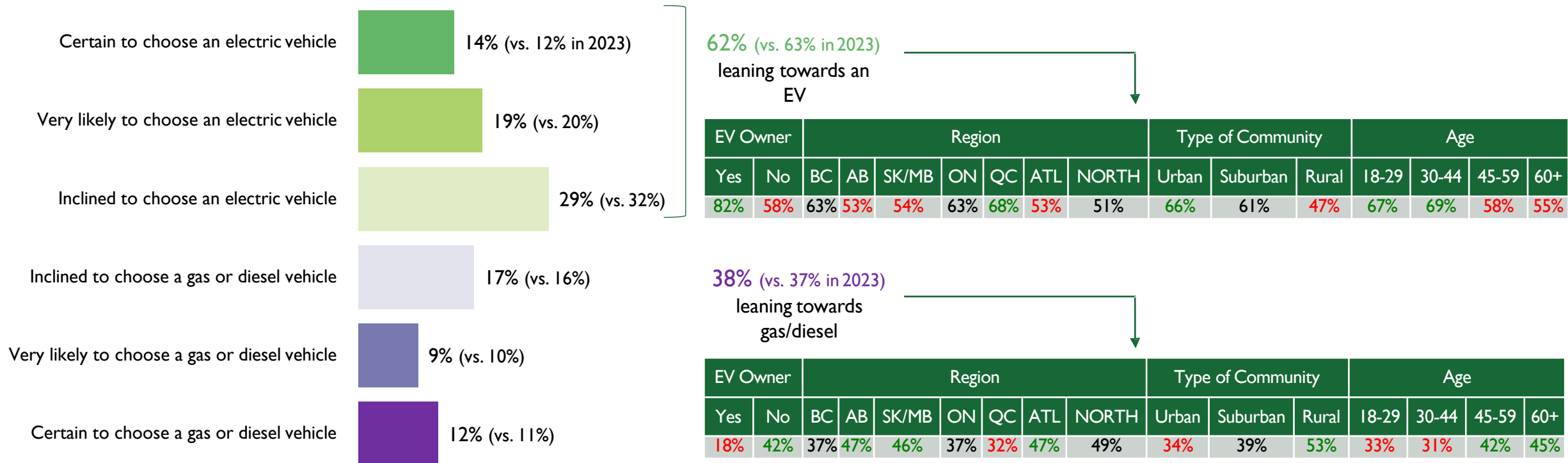


Base n = 6150



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 represents a 18 points or 40% increase between the beginning and the end of the survey, demonstrating how EV education is key.



Base n = 6150

Thank You

This project was undertaken with the financial support
of the Government of Canada.

Ce projet a été réalisé avec l'appui financier
du gouvernement du Canada.

Canada

To support the mandate of Canada's Net-Zero Advisory Body related to research, this project was undertaken with the financial support of the Government of Canada. Funding was provided through the Environmental Damages Funds' Climate Action and Awareness Fund, administered by Environment and Climate Change Canada.

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