

OMNIBUS SURVEY RESULTS

VEHICLE MANUFACTURERS AND ZERO-EMISSIONS VEHICLE SALES TARGETS CONDUCTED FOR ENVIRONMENTAL DEFENCE

RESEARCH AND ANALYSIS FROM CANADA'S LEADING PUBLIC AFFAIRS AND MARKET RESEARCH EXPERTS

METHODOLOGY

The survey was conducted with 1,500 Canadians aged 18 and over, from July 22 to 27, 2022. A random sample of panelists were invited to complete the survey from a set of partner panels based on the Lucid exchange platform. These partners are typically double opt-in survey panels, blended to manage out potential skews in the data from a single source.

Oversamples were conducted in Ontario (n=1,000) and Nova Scotia (n=500).

The margin of error for a comparable probability-based random sample of the same size is +/- 2.53%, 19 times out of 20.

The data were weighted according to census data to ensure that the sample matched Canada's population of recent newcomers according to age, gender, and region. Totals may not add up to 100 due to rounding.

KEY FINDINGS

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KEY FINDINGS

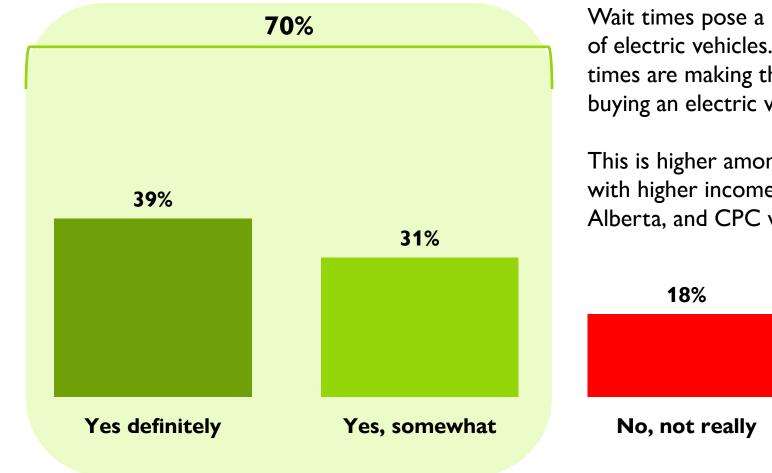
- Over half (58%) of Canadians support the federal government stepping in and imposing penalties on vehicle manufacturers who do not produce and sell more zero-emission vehicles.
 - 21% neither support nor oppose, and 21% oppose.
 - Support is strongest in BC, Ontario and Quebec. Among those with higher education and income, unionized individuals and those who voted LPC, NDP or Green in the last federal election.
- 86% support policy that would result in vehicle manufacturers providing zero-emission vehicles at more affordable prices, to meet the 2035 target.
- 84% support national standards for zero-emission vehicle availability so Canadians all over the country can have equal access to these vehicles
- 83% say vehicle manufacturers need to increase investment to zero-emission vehicles, to meet the 2035 target.
- 82% agree we need policy to increase supply and reduce wait times of zero-emission vehicles to meet the 2035 target.
- 70% of Canadians say wait times are making them less likely to consider buying an electric vehicle.
- 74% of Canadians agree with the statement "I believe vehicle manufacturers have a responsibility to increase zeroemissions vehicle production, and shift away from producing gasoline-powered vehicles, even if it has a negative impact on their profits".



RESULTS



70% SAY WAIT TIMES IMPACTING THEIR DECISION TO BUY AN ELECTRIC VEHICLE



Wait times pose a large challenge to the adoption of electric vehicles. 70% of Canadians say wait times are making them less likely to consider buying an electric vehicle.

This is higher among younger Canadians, those with higher incomes, individuals in Ontario and Alberta, and CPC voters.



12%

No, not at all

In February 2021 nearly two-thirds of Canadian dealership reported wait times of three to six months for an electric car order Now some are reporting wait times of three years Would you say these wait times are making you less likely to consider buying an electric vehicle?

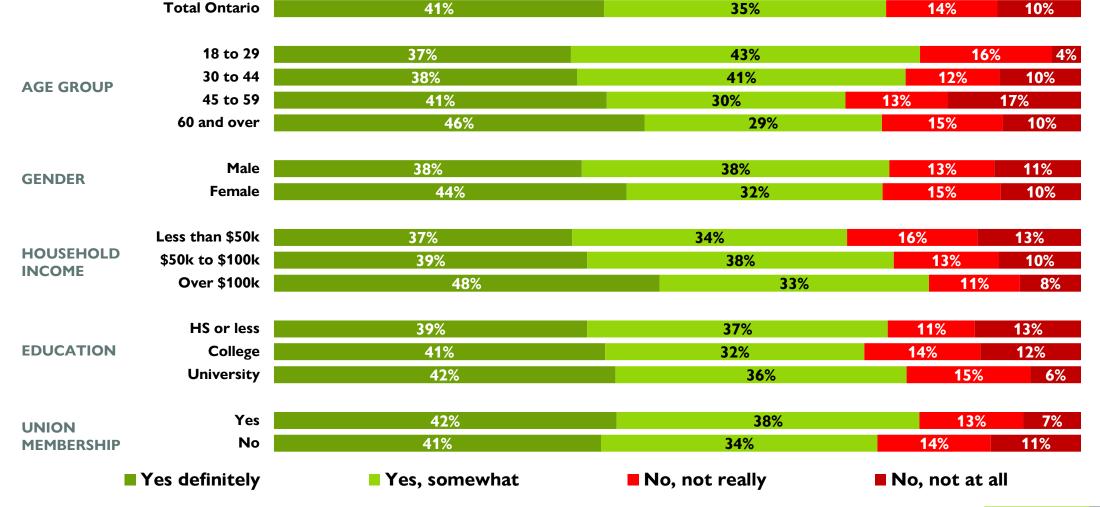
WAITING TIMES: REASON FOR NOT BUYING AN ELECTRIC VEHICLE?

	Total	39%	31%	18% 12%
AGE GROUP	18 to 29 30 to 44 45 to 59 60 and over	37% 40% 39% 41%	41% 35% 25% 26%	18% 4% 16% 9% 17% 19% 20% 13%
GENDER	Male Female	38% 40%	34% 28%	17% 11% 19% 13%
REGION	BC AB SK/MB ON QC ATL	39% 55% 32% 41% 30% 41%	35% 15% 32% 35% 29% 28%	17% 9% 14% 16% 16% 20% 14% 10% 30% 11% 18% 13%
TARGET PROVINCE	Nova Scotia Ontario	<u>41%</u> 41%	27% 35%	19% 13% 14% 10%
HOUSEHOLD INCOME	Less than \$50k \$50k to \$100k Over \$100k	37% 38% 45%	28% 2 8% 33%	20% 15% 19% 10% 14% 8%
EDUCATION	HS or less College University	36% 42% 39%	29% 29% 34%	20% 16% 17% 12% 19% 8%
UNION MEMBERSHIP	Yes No	<u>41%</u> 39%	36% 29%	14% 8% 19% 13%
PAST FED VOTE 2021	CPC LPC NDP Green	46% 38% 32% 30%	26% 35% 39% 40%	12% 15% 20% 7% 17% 11% 17% 13%
(=	es definitely	Yes, somewhat	No, not really	No, not at all

In February 2021 nearly two-thirds of Canadian dealership reported wait times of three to six months for an electric car order Now some are reporting wait times of three years Would you say these wait times are making you less likely to consider buying an electric vehicle?



WAITING TIMES: REASON FOR NOT BUYING AN ELECTRIC VEHICLE?

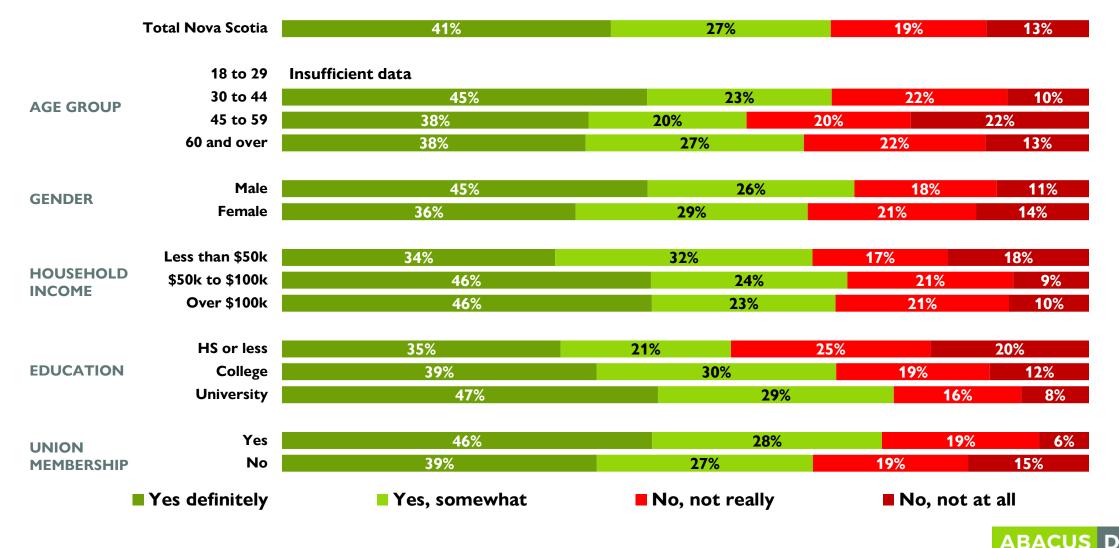


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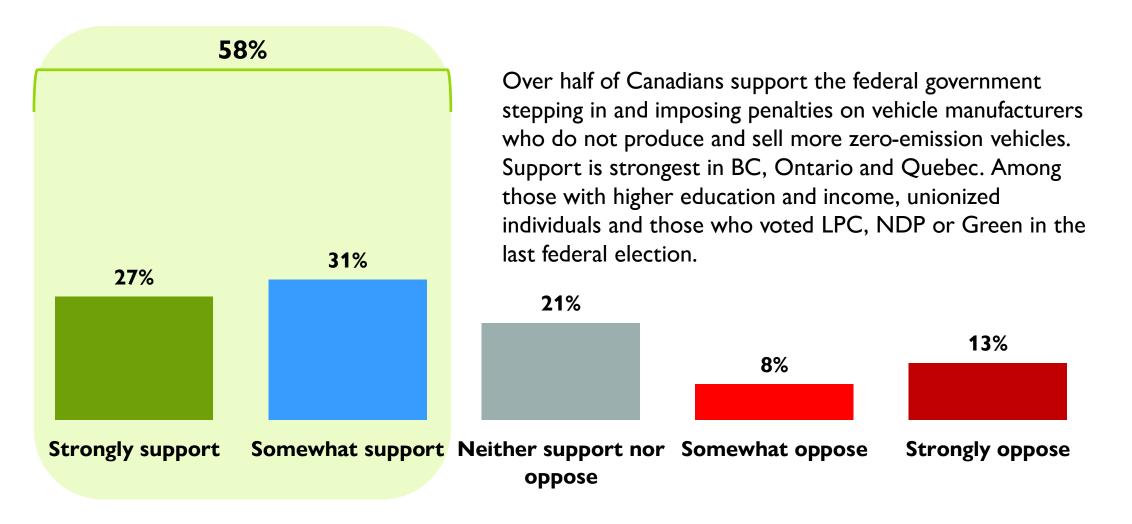
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WAITING TIMES: REASON FOR NOT BUYING AN ELECTRIC VEHICLE?



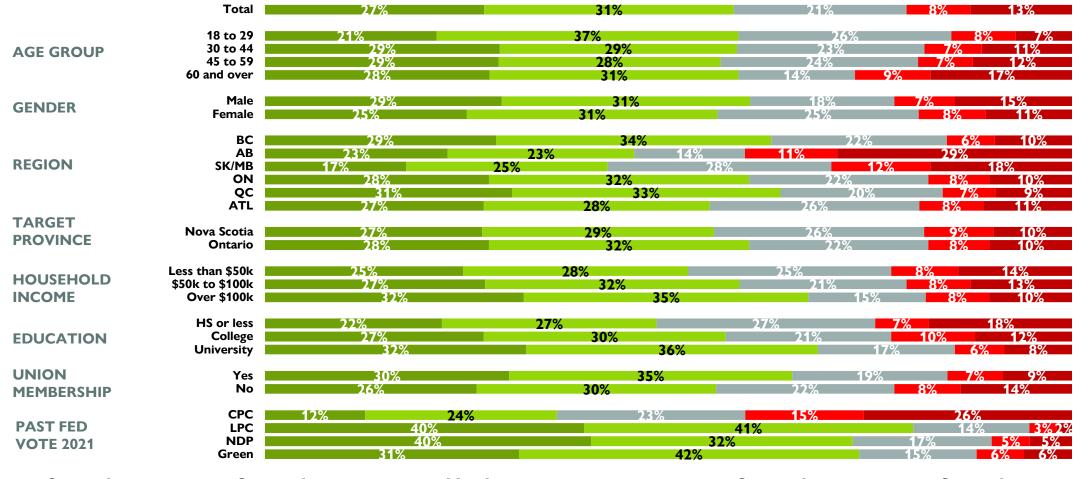
In February 2021 nearly two-thirds of Canadian dealership reported wait times of three to six months for an electric car order Now some are reporting wait times of three years Would you say these wait times are making you less likely to consider buying an electric vehicle?

OVER HALF SUPPORT PENALTIES FOR VEHICLE MANUFACTURERS WHO DO NOT PRODUCE, SELL MORE ZERO-EMISSION VEHICLES AS PER TARGET





SUPPORT FOR PENALTIES

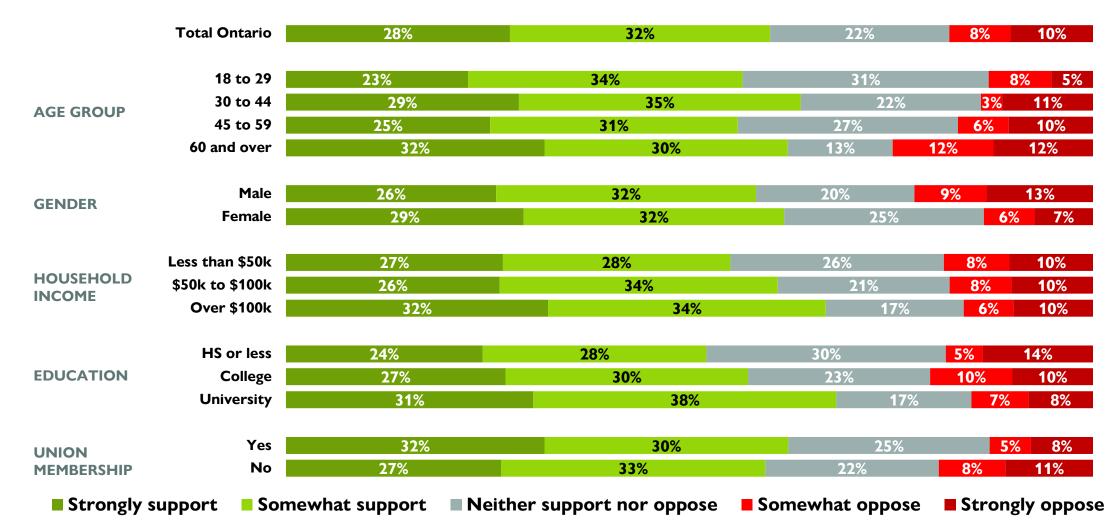


Strongly support Somewhat support Neither support nor oppose Somewhat oppose

Strongly oppose

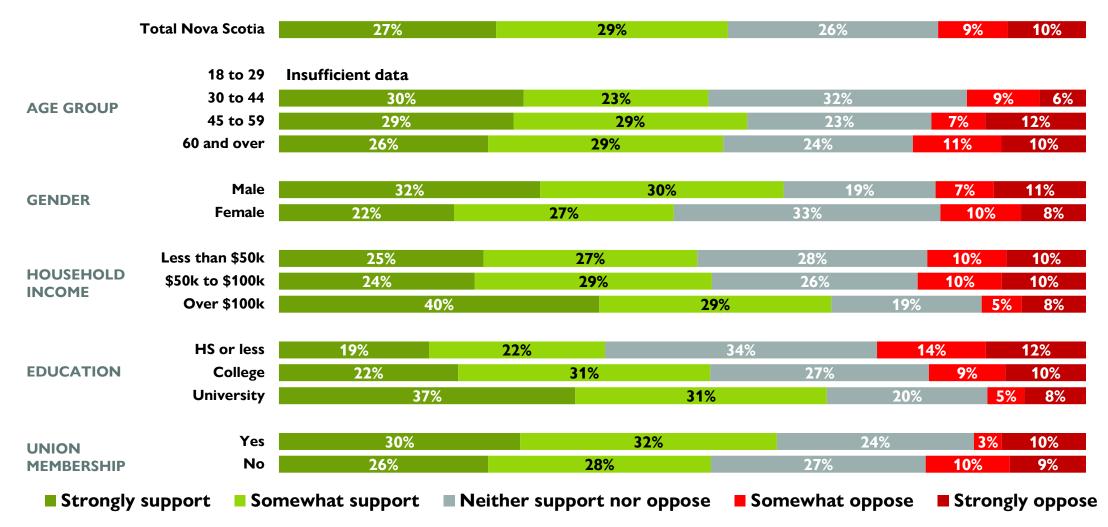


SUPPORT FOR PENALTIES





SUPPORT FOR PENALTIES





DO YOU AGREE OR DISAGREE WITH...

To meet the 2035 target of 100% of new vehicles sold being zero-emissions, we need policy that will result in vehicle manufacturers providing zero-emission vehicles at more affordable prices

We need national standards for zero-emission vehicle availability, so Canadians in all parts of the country can have equal opportunities to purchase a zero-emissions vehicle

To meet the 2035 target of 100% new vehicles sold being zero-emissions, vehicle manufacturers need to increase investment into zero-emissions vehicle production

To meet the 2035 target of 100% of new vehicles sold being zero-emissions, we need policy that will increase the supply of zeroemission vehicles and reduces wait times for consumers

Strongly agree

Somewhat agree

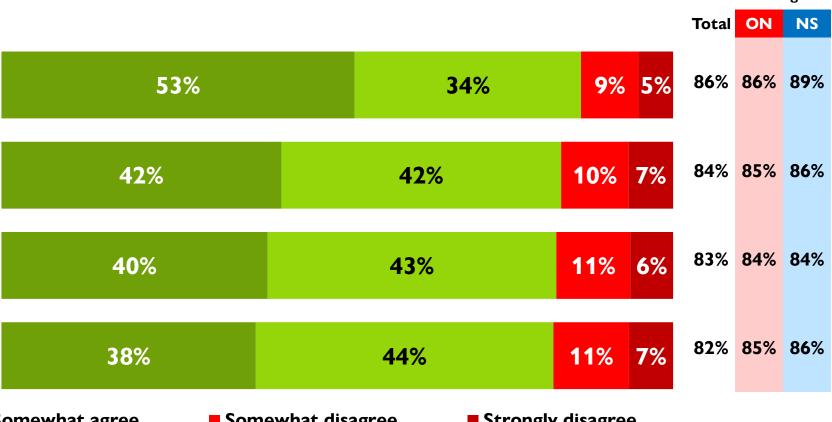
Somewhat disagree

Strongly disagree

% Strongly / Somewhat agree

ABACUS

Canadians are much more supportive of the outcomes of the policy to meet these targets. Above all else, there is widespread support for increasing affordability of these vehicles. Over 80% also support national standards so Canadians in all parts of Canada can have equal access to zero-emission vehicles, note the need for increased investment to zero-emissions vehicle production, and support for policy that increases supply and reduces wait times.

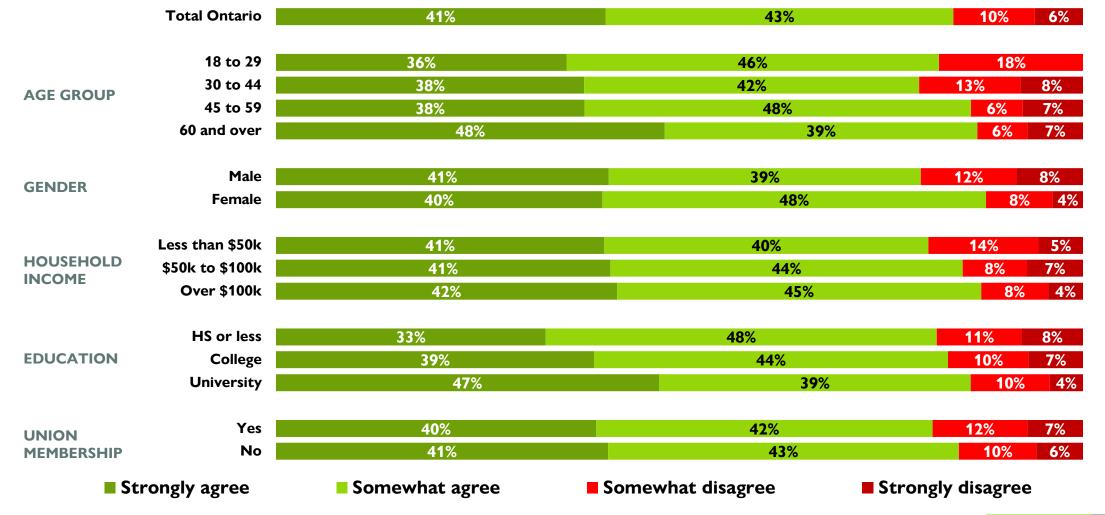


"TO MEET THE 2035 TARGET OF 100% NEW VEHICLES SOLD BEING ZERO-EMISSIONS, VEHICLE MANUFACTURERS NEED TO INCREASE INVESTMENT INTO ZERO-EMISSIONS VEHICLE PRODUCTION"

	Total	40%	43%	11% 6%
AGE GROUP	18 to 29	33%	45%	19% 4%
	30 to 44	37%	44%	14% 6%
	45 to 59	41%	43%	9% 8%
	60 and over	45%	41%	6% 7%
GENDER	Male Female	<u> </u>	37% 49%	12% 7% 10% 6%
REGION	BC	40%	45%	9% 5%
	AB	37%	35%	15% 12%
	SK/MB	29%	49%	14% 8%
	ON	41%	43%	10% 6%
	QC	41%	43%	11% 5%
	ATL	40%	43%	12% 5%
TARGET	Nova Scotia	<u>40%</u>	44%	12% 4%
PROVINCE	Ontario	41%	43%	10% 6%
HOUSEHOLD INCOME	Less than \$50k \$50k to \$100k Over \$100k	36% 41% 45%	44% 43% 41%	13% 8% 10% 6% 10% 4%
EDUCATION	HS or less	33%	45%	15% 8%
	College	41%	42%	10% 7%
	University	45%	42%	9% 4%
UNION	Yes No	<u>39%</u>	44%	11% 6%
MEMBERSHIP		40%	43%	11% 7%
PAST FED VOTE 2021	CPC LPC NDP Green	29% 51% 51% 47%	42% 4 37% 46%	17% 12% 3% 6% 10% 3% 4% 3%
Strongly agree		Somewhat agree	Somewhat disagree	Strongly disagree

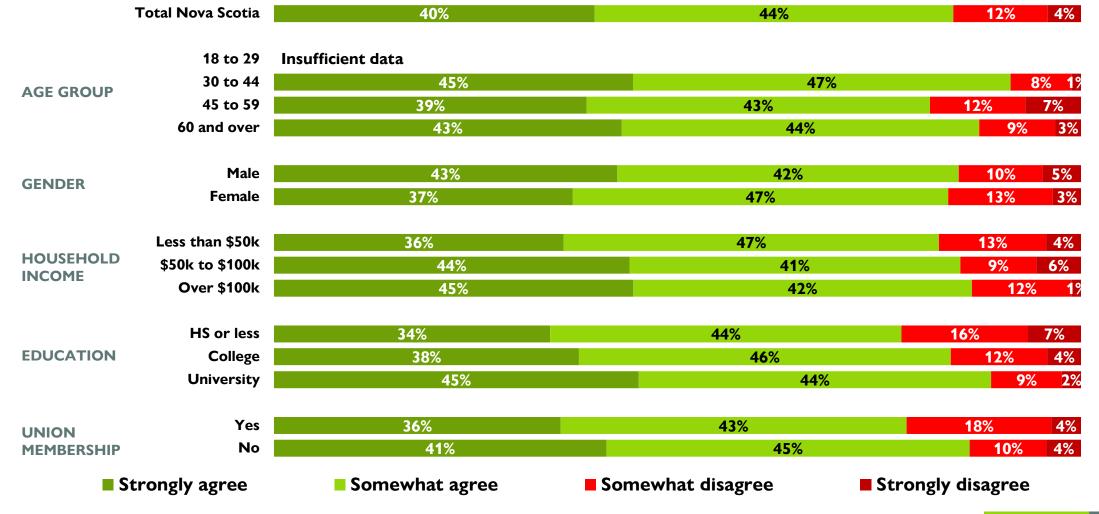


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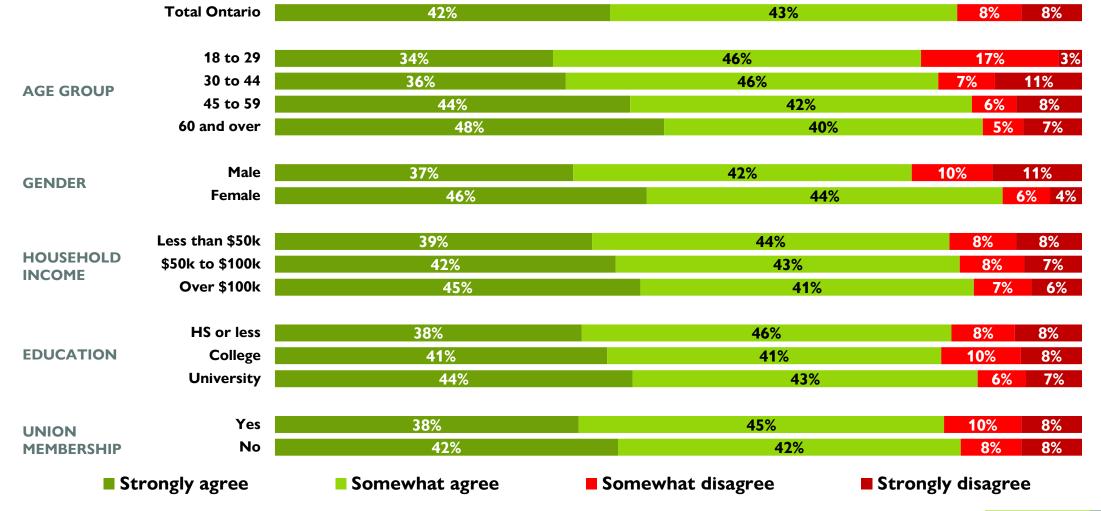


"WE NEED NATIONAL STANDARDS FOR ZERO-EMISSION VEHICLE AVAILABILITY, SO CANADIANS IN ALL PARTS OF THE COUNTRY CAN HAVE EQUAL OPPORTUNITIES TO PURCHASE A ZERO-EMISSIONS VEHICLE"

	Total	42%	42%	10% 7%
AGE GROUP	18 to 29 30 to 44 45 to 59 60 and over	32% 37% 48% 46%	46% 44% 36% 41%	18% 4% 11% 8% 9% 7% 6% 7%
GENDER	Male Female	<u>43%</u> 41%	37% 46%	12% 8% 8% 5%
REGION	BC AB SK/MB ON QC ATL	46% 36% 37% 42% 43% 43%	43% 37% 45% 43% 40% 42%	7% 4% 16% 11% 9% 8% 8% 8% 13% 4% 10% 5%
TARGET PROVINCE	Nova Scotia Ontario	<u> </u>	42% 43%	10% 4% 8% 8%
HOUSEHOLD INCOME	Less than \$50k \$50k to \$100k Over \$100k	40% 42% 47%	42% 43% 40%	10% 9% 10% 5% 9% 5%
EDUCATION	HS or less College University	39% 42% 44%	44% 38% 44%	11% 6% 12% 8% 6% 6%
UNION MEMBERSHIP	Yes No	37% 43%	49% 40%	9% 6% 10% 7%
PAST FED VOTE 2021	CPC LPC NDP Green	30% 52% 51% 54%	44% 42% 41% 33%	14% 12% 6% 1% 7% 2% 8% 5%
Strongly agree		Somewhat agree	Somewhat disagree	ongly disagree

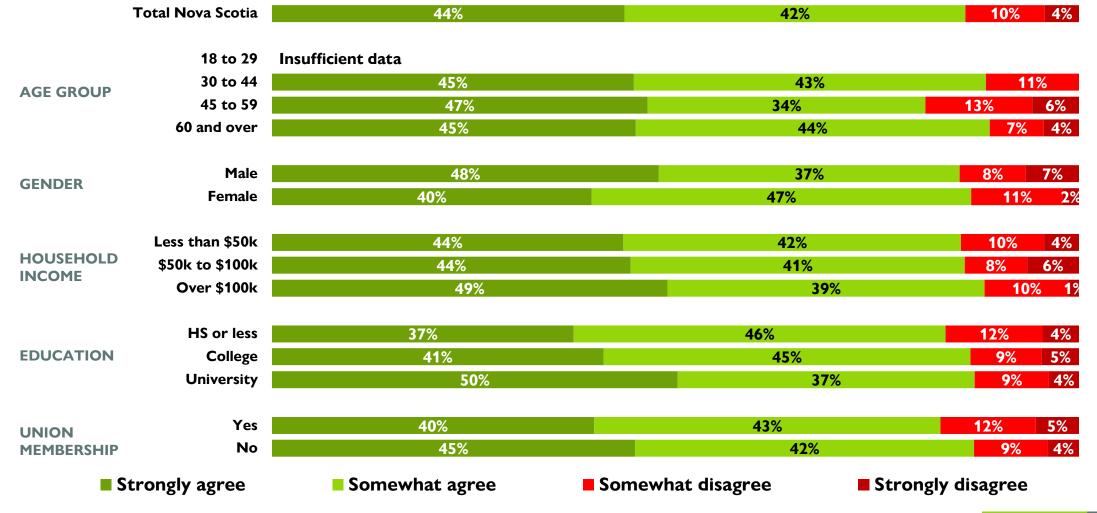


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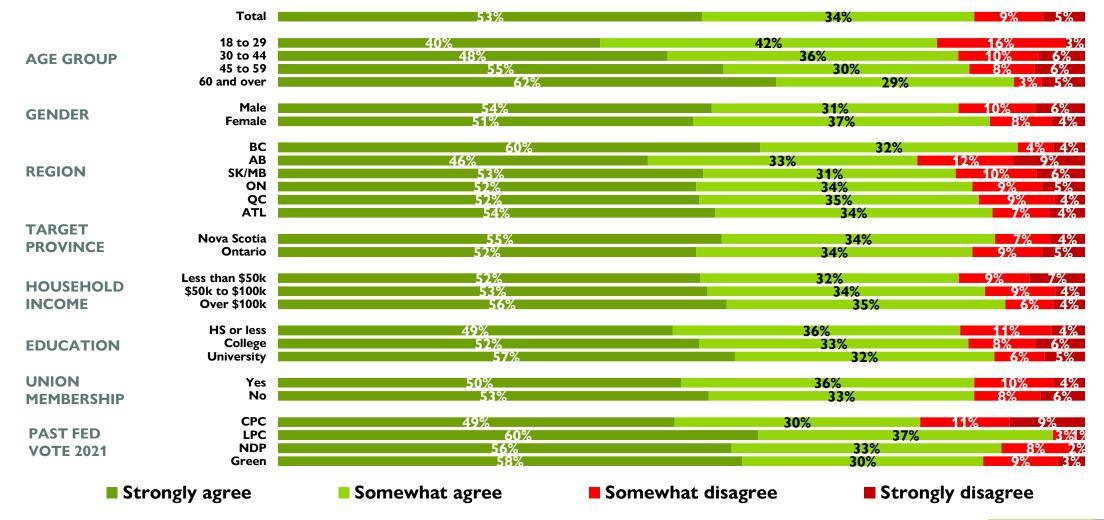


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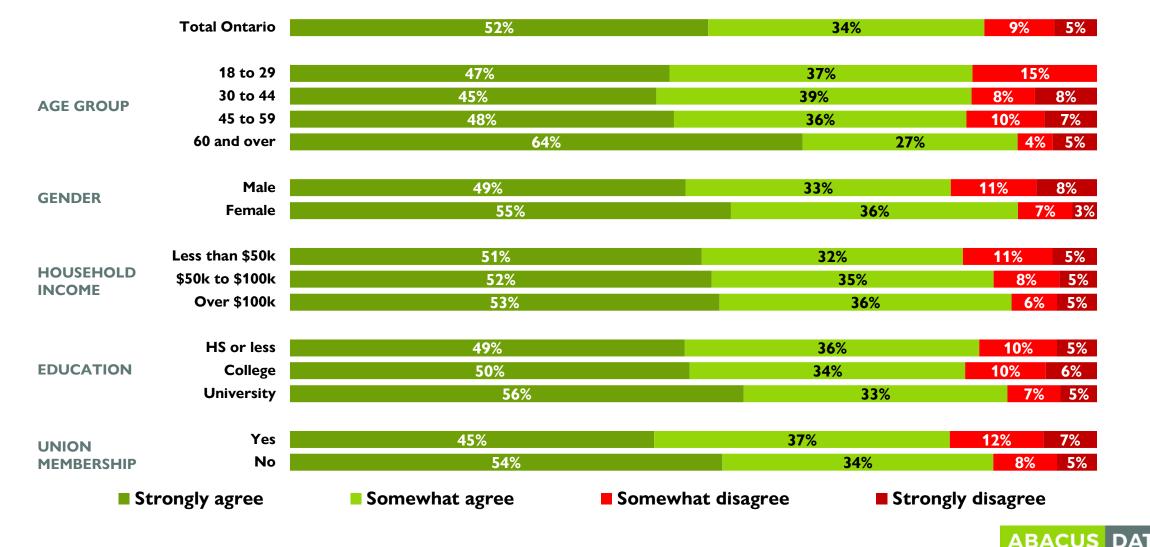


"TO MEET THE 2035 TARGET OF 100% OF NEW VEHICLES SOLD BEING ZERO-EMISSIONS, WE NEED POLICY THAT WILL RESULT IN VEHICLE MANUFACTURERS PROVIDING ZERO-EMISSION VEHICLES AT MORE AFFORDABLE PRICES"

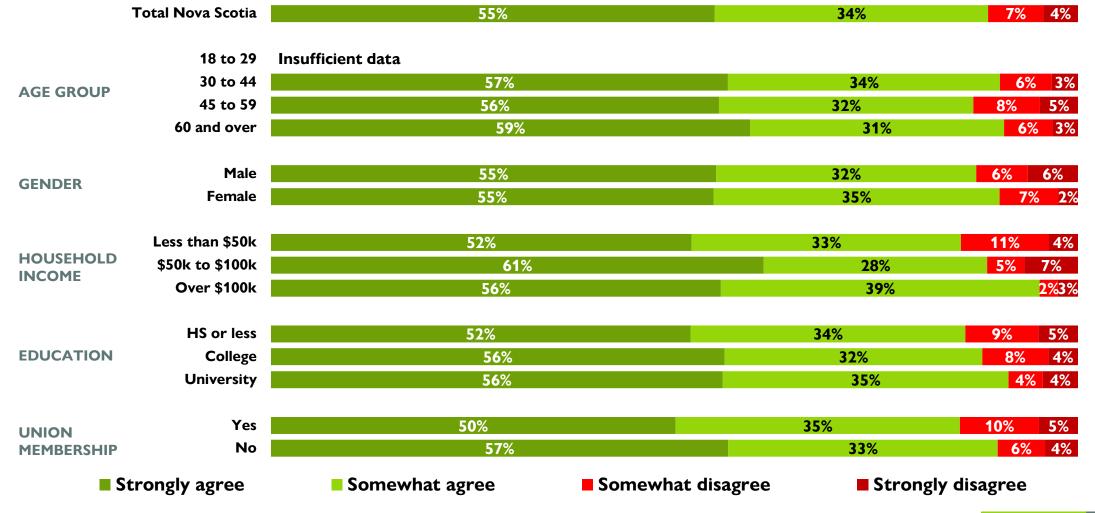




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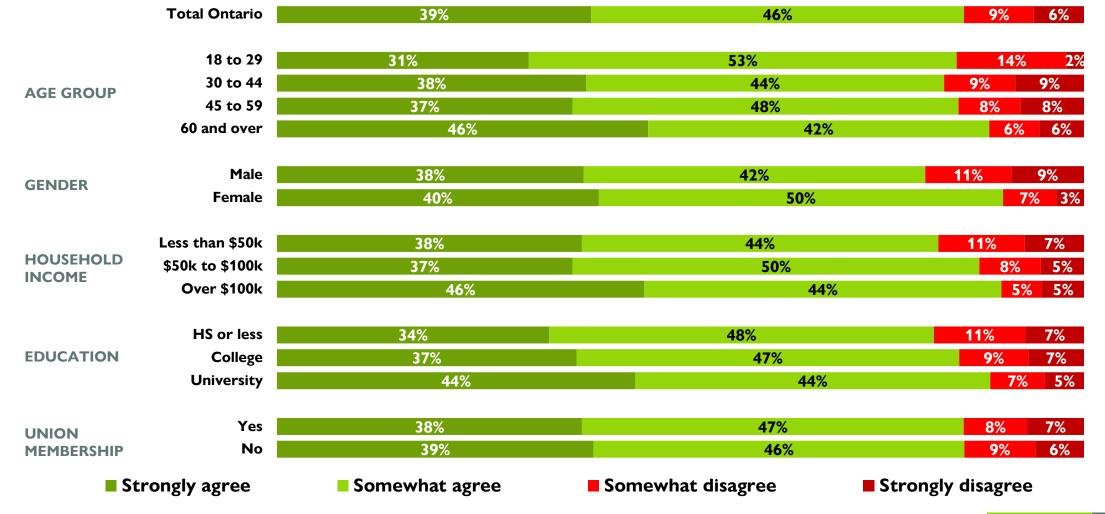


"TO MEET THE 2035 TARGET OF 100% OF NEW VEHICLES SOLD BEING ZERO-EMISSIONS, WE NEED POLICY THAT WILL INCREASE THE SUPPLY OF ZERO-EMISSION VEHICLES AND REDUCES WAIT TIMES FOR CONSUMERS"

	Total	38%	44%	11% 7%
AGE GROUP	18 to 29	26%	53%	18% 3%
	30 to 44	36%	45%	11% 7%
	45 to 59	39%	42%	9% 9%
	60 and over	45%	40%	9% 6%
GENDER	Male Female	<u>40%</u> 35%	40% 49%	11% 8% 11% 5%
REGION	BC	42%	42%	11% 6%
	AB	31%	43%	14% 12%
	SK/MB	29%	43%	21% 6%
	ON	39%	46%	9% 6%
	QC	39%	43%	12% 6%
	ATL	38%	47%	10% 5%
TARGET	Nova Scotia	<u>38%</u>	48%	10% 5%
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	University	44%	44%	7% 5%
UNION	Yes No	<u>37%</u>	48%	10% 5%
MEMBERSHIP		38%	43%	12% 7%
PAST FED VOTE 2021	CPC LPC NDP Green	32% 47% 42% 53%	40% 46% 44% 33%	16% 12% 5% 2% 11% 2% 11% 3%
Strongly agree		Somewhat agree	Somewhat disagree	Strongly disagree

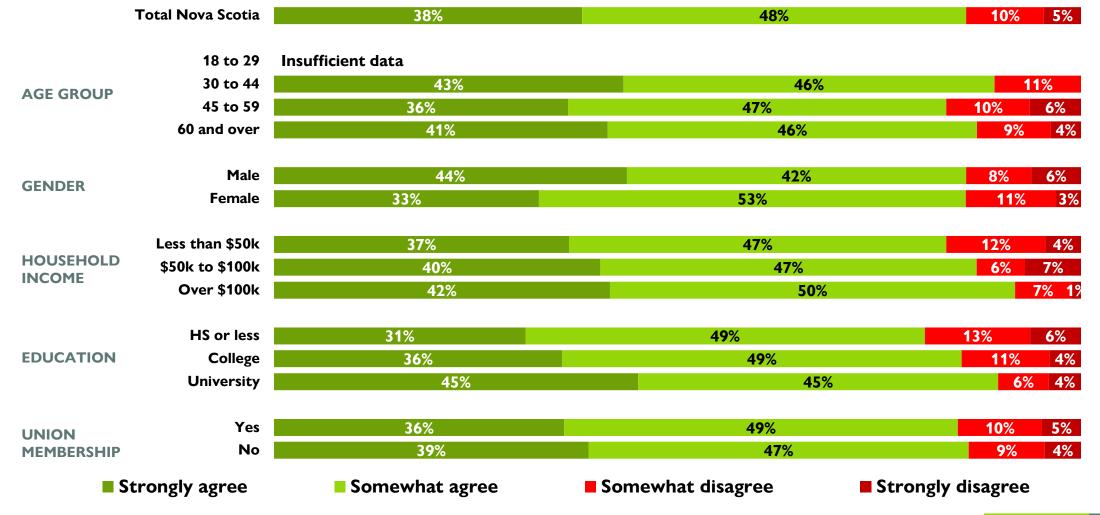


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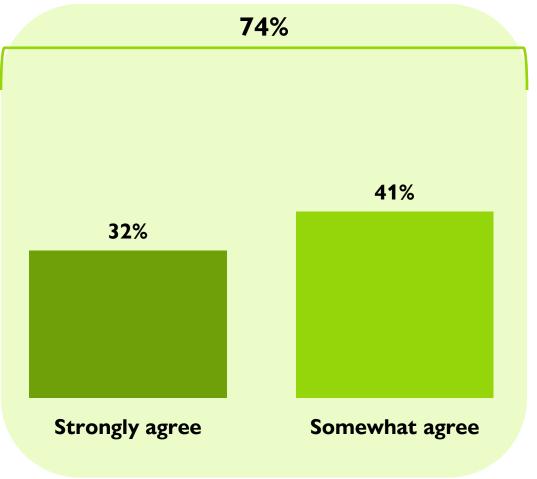




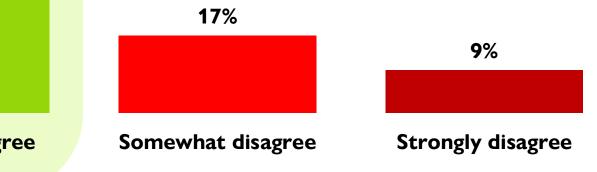
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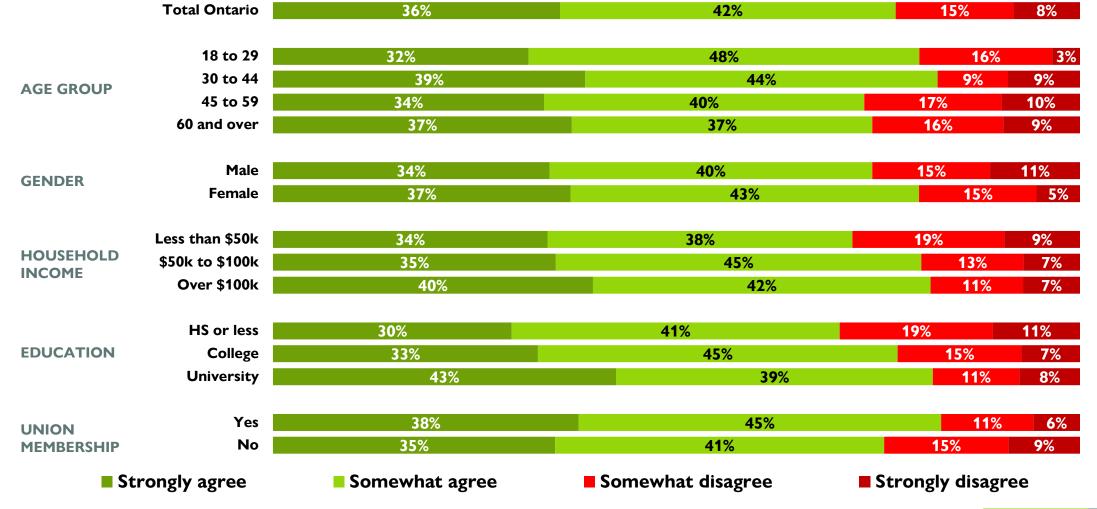
While support for penalties may not be as strong, the majority of Canadians see vehicle manufacturers having a responsibility to increase zero-emissions vehicle production even if it means forgoing profits.





	Total	32%	41%	17% 9%
AGE GROUP	18 to 29 30 to 44 45 to 59 60 and over	28% 34% 33% 33%	49% 41% 41% 37%	17% 6% 15% 9% 17% 9% 19% 12%
GENDER	Male Female	34% 31%	39% 43%	15% 12% 19% 7%
REGION	BC AB SK/MB ON QC ATL	34% 29% 19% 36% 32% 33%	30% 30% 42% 42% 48% 39%	18% 9% 25% 16% 22% 17% 15% 8% 14% 6% 20% 8%
TARGET PROVINCE	Nova Scotia Ontario	33% 36%	39% 42%	21% 8% 15% 8%
HOUSEHOLD INCOME	Less than \$50k \$50k to \$100k Over \$100k	28% 35% 37%	41% 41% 44%	20% 12% 16% 8% 13% 7%
EDUCATION	HS or less College University	27% 32% 39%	40% 41% 42%	22% 11% 16% 11% 13% 6%
UNION MEMBERSHIP	Yes No	<u>36%</u> 31%	43% 41%	14% 7% 18% 10%
PAST FED VOTE 2021	CPC LPC NDP Green	20% 42% 43% 38%	37% 46% 41% 44%	27% 16% 9% 2% 13% 3% 10% 9%
Str	ongly agree	Somewhat agree	Somewhat disagree	Strongly disagree

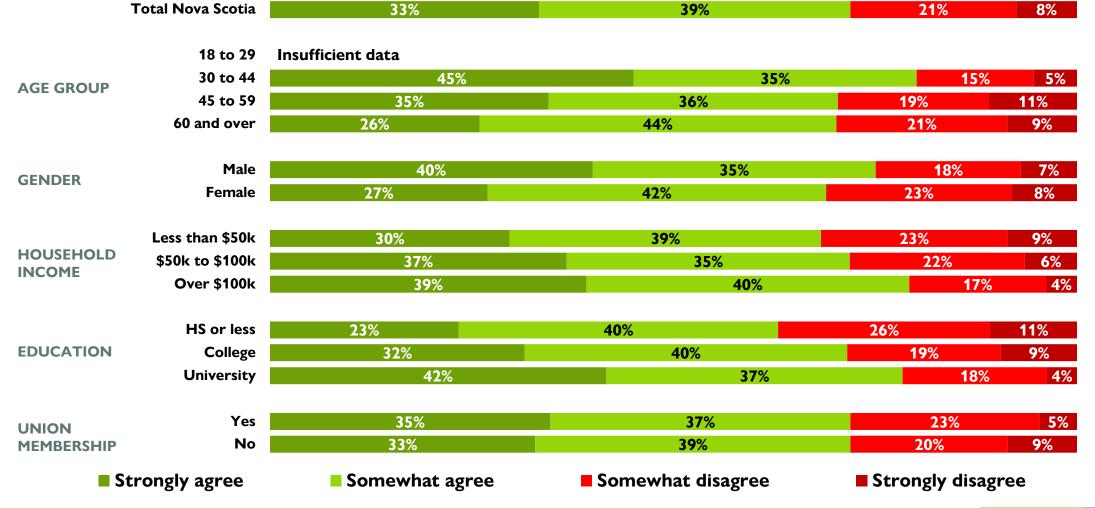






ONTARIO

Do you agree or disagree with the following?





NOVA SCOTIA

Do you agree or disagree with the following?