

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

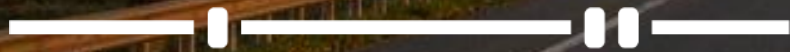
ABACUS DATA

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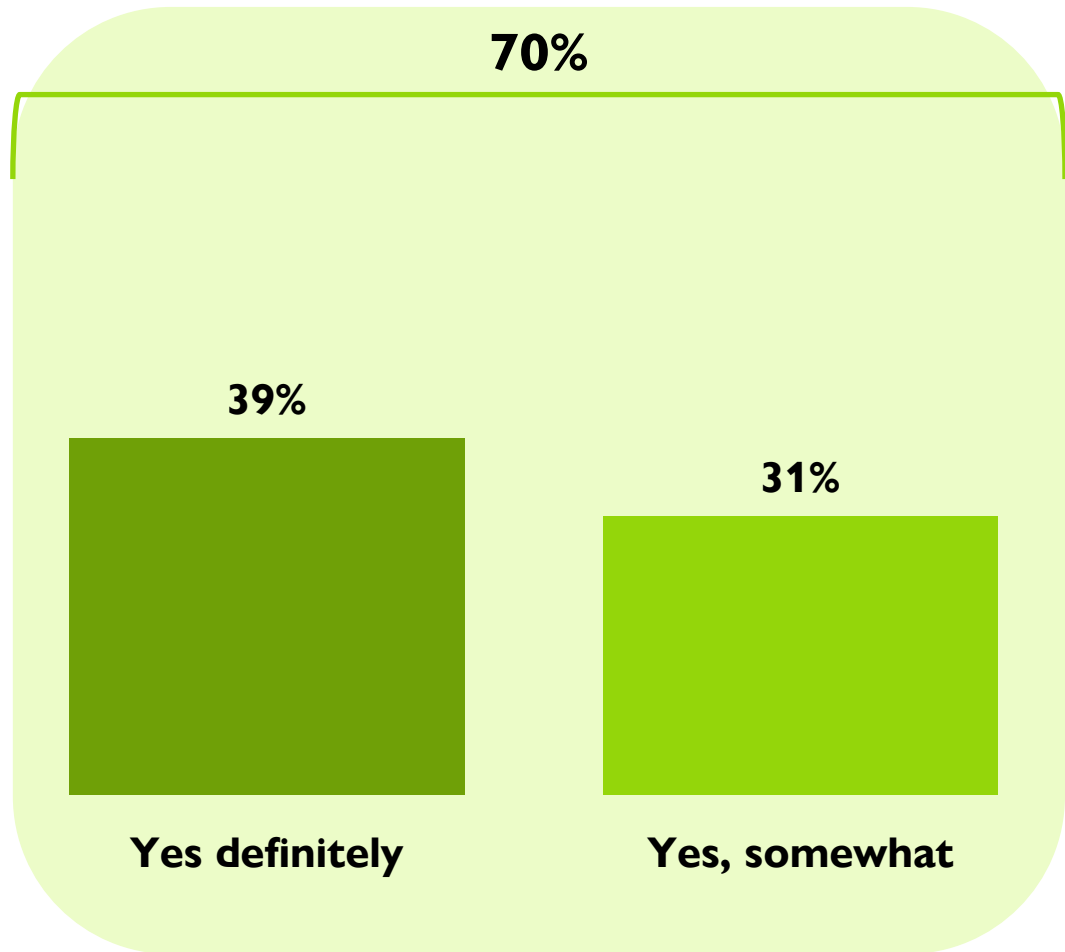
- Over half (58%) of Canadians support the federal government stepping in and imposing penalties on vehicle manufacturers who do not produce and sell more zero-emission vehicles.
 - 21% neither support nor oppose, and 21% oppose.
 - Support is strongest in BC, Ontario and Quebec. Among those with higher 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 zero-emissions vehicle production, and shift away from producing gasoline-powered vehicles, even if it has a negative impact on their profits”*.

RESULTS

ABACUS DATA

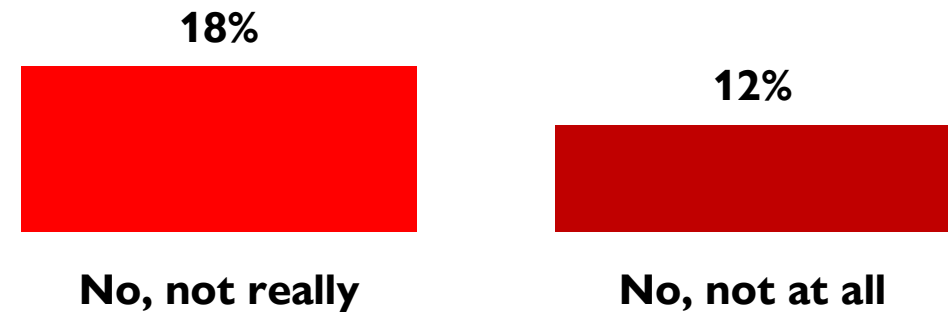


70% SAY WAIT TIMES IMPACTING THEIR DECISION TO BUY AN ELECTRIC VEHICLE



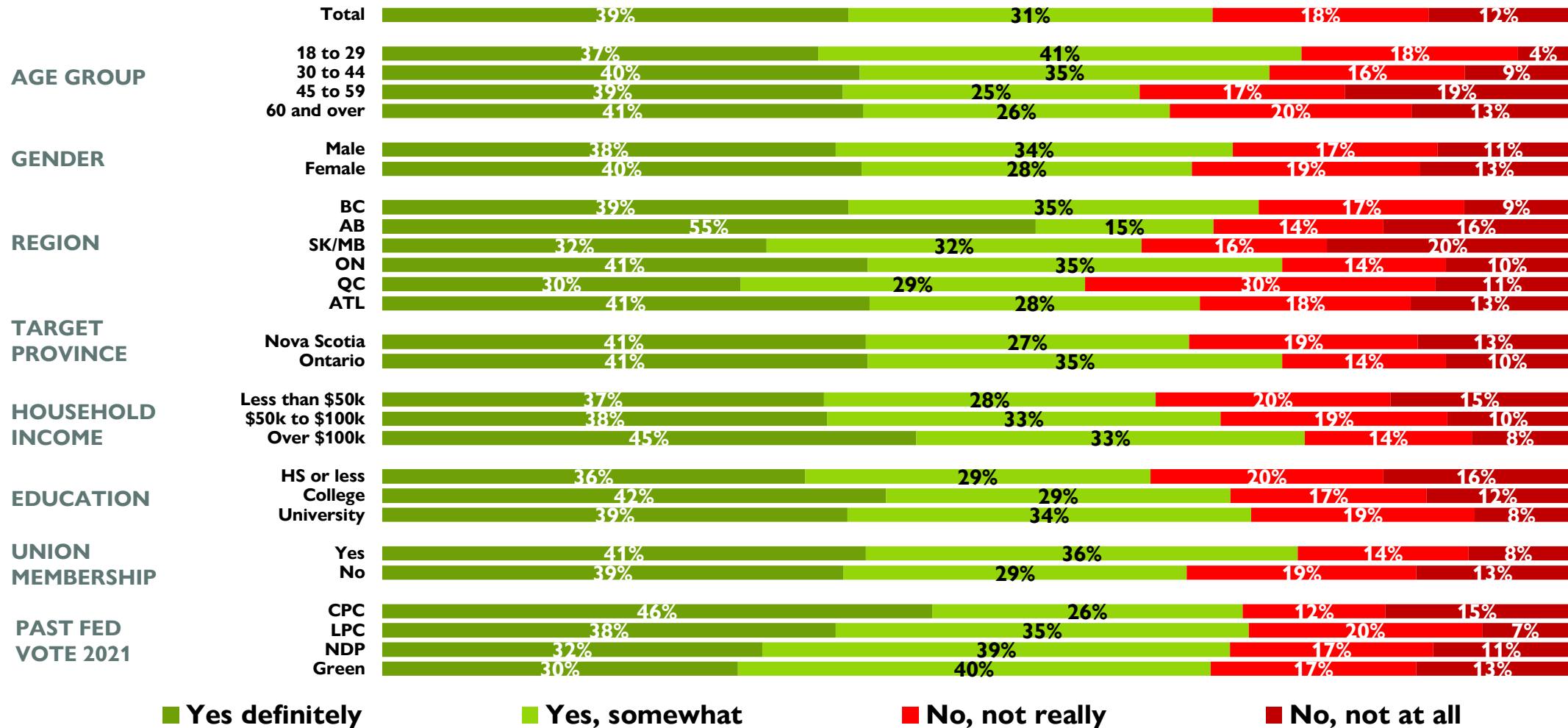
Wait times pose a large challenge to the adoption of electric vehicles. 70% of Canadians say wait times are making them less likely to consider buying an electric vehicle.

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



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?

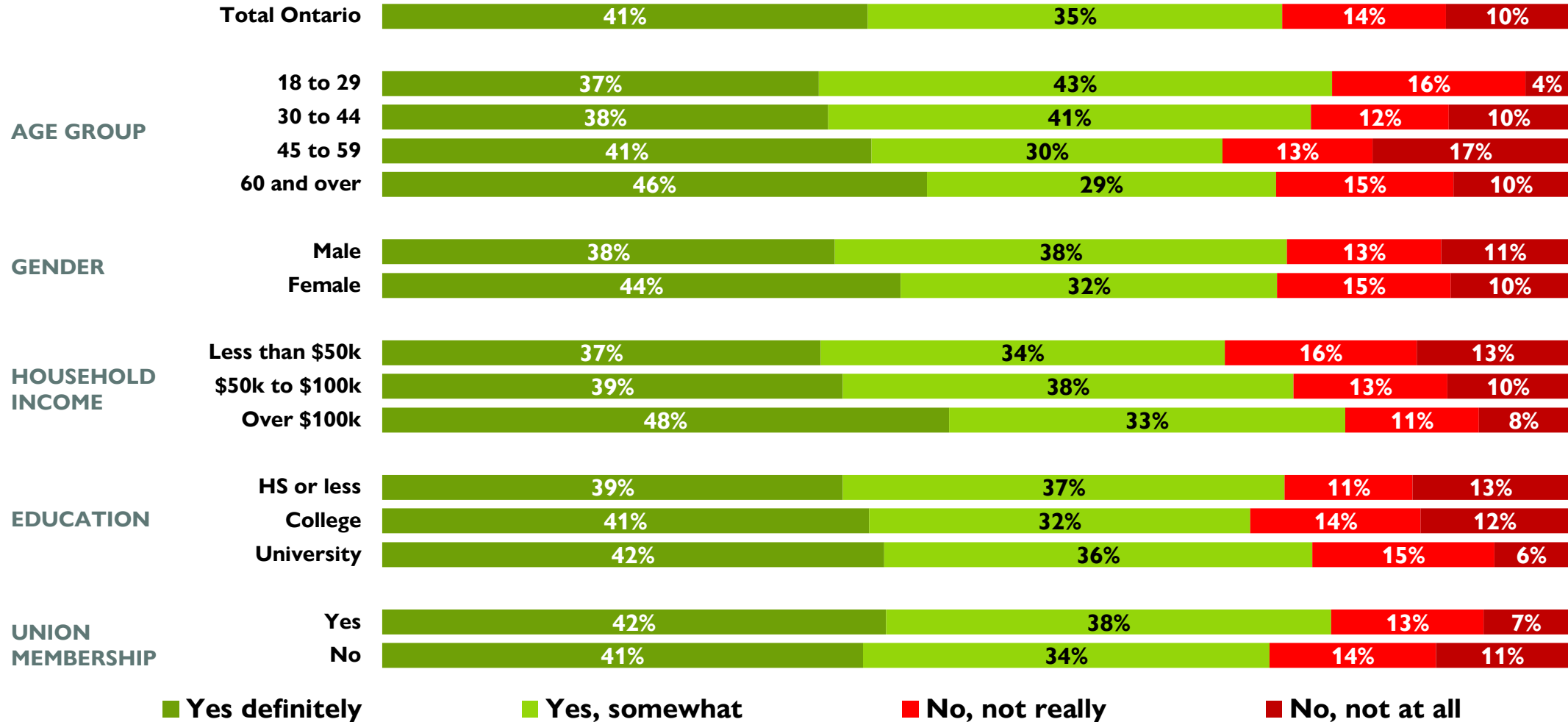
WAITING TIMES: REASON FOR NOT BUYING AN ELECTRIC VEHICLE?



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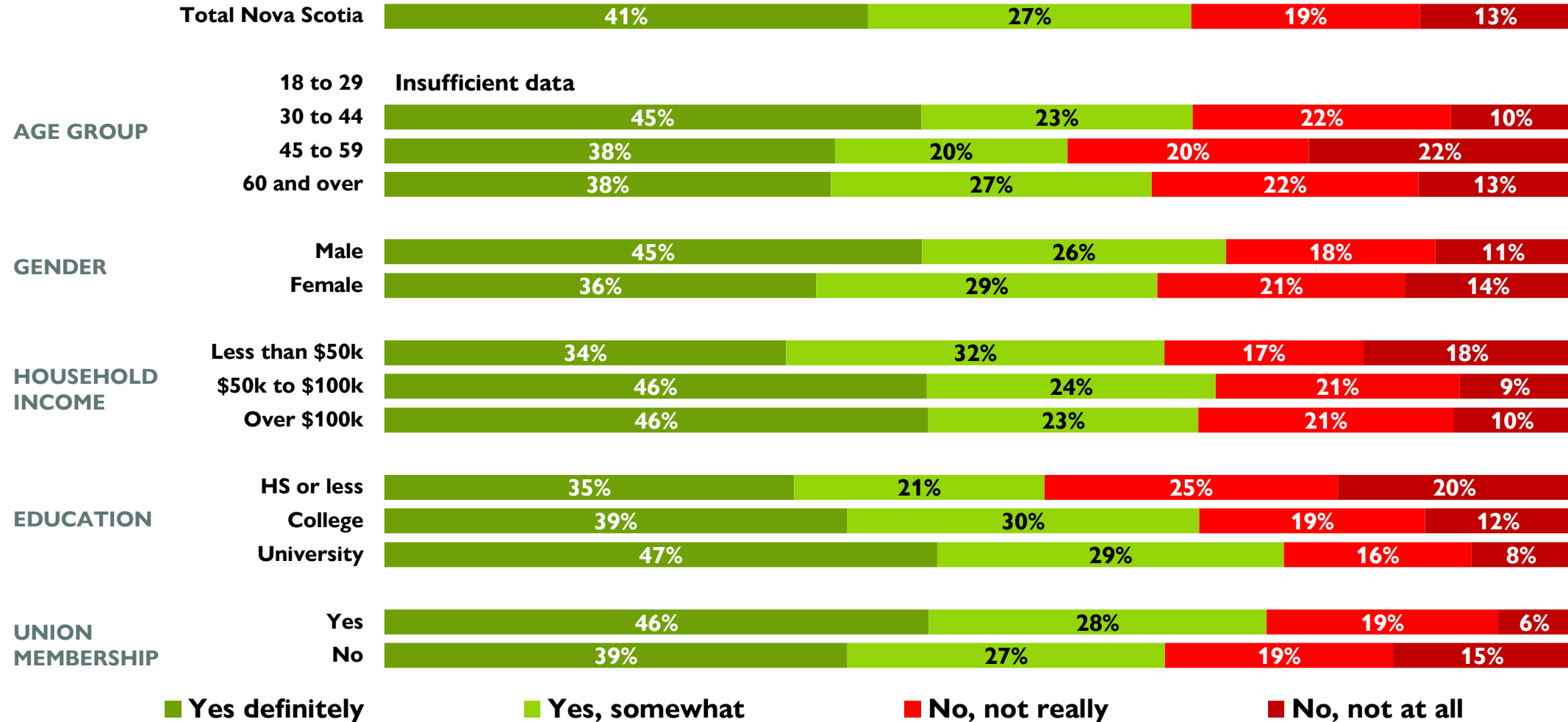
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ONTARIO



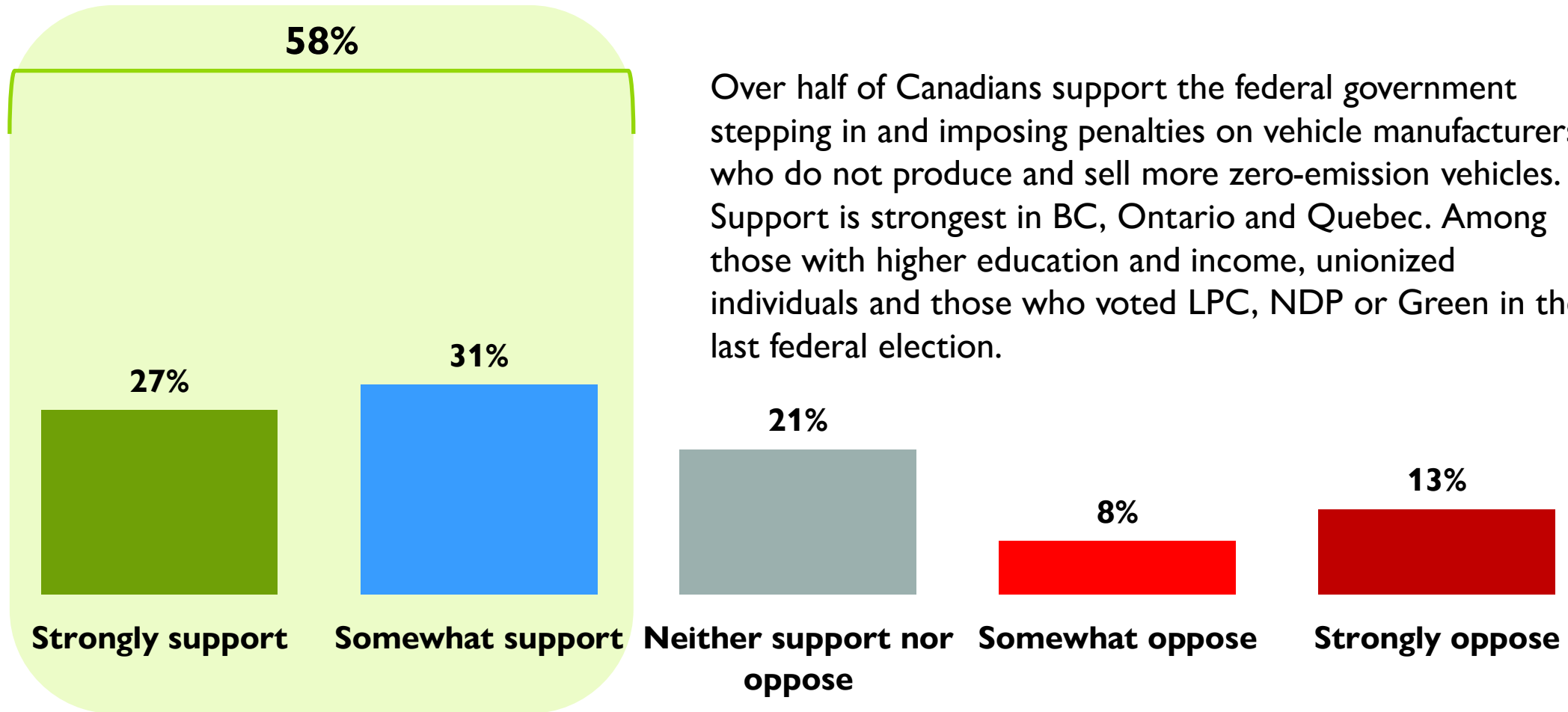
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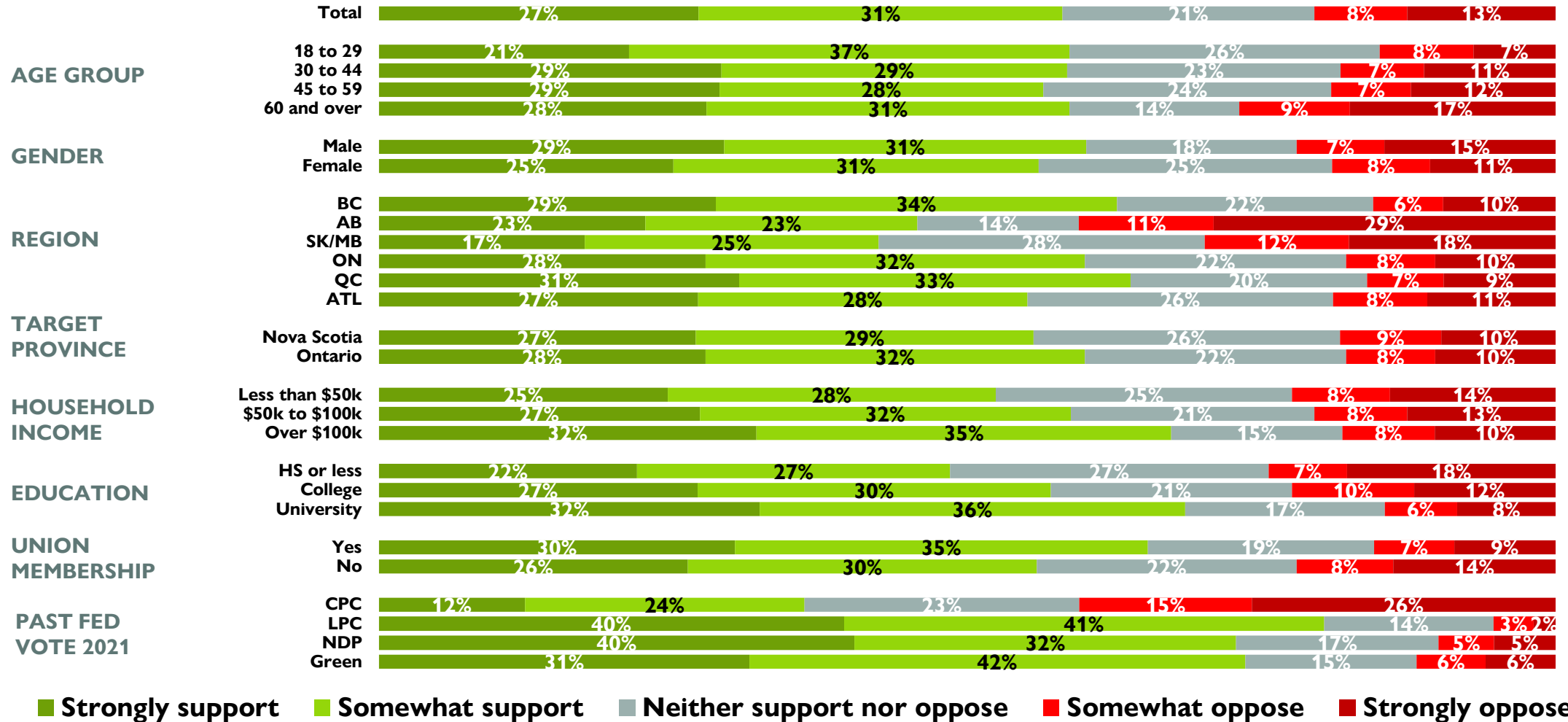
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OVER HALF SUPPORT PENALTIES FOR VEHICLE MANUFACTURERS WHO DO NOT PRODUCE, SELL MORE ZERO-EMISSION VEHICLES AS PER TARGET



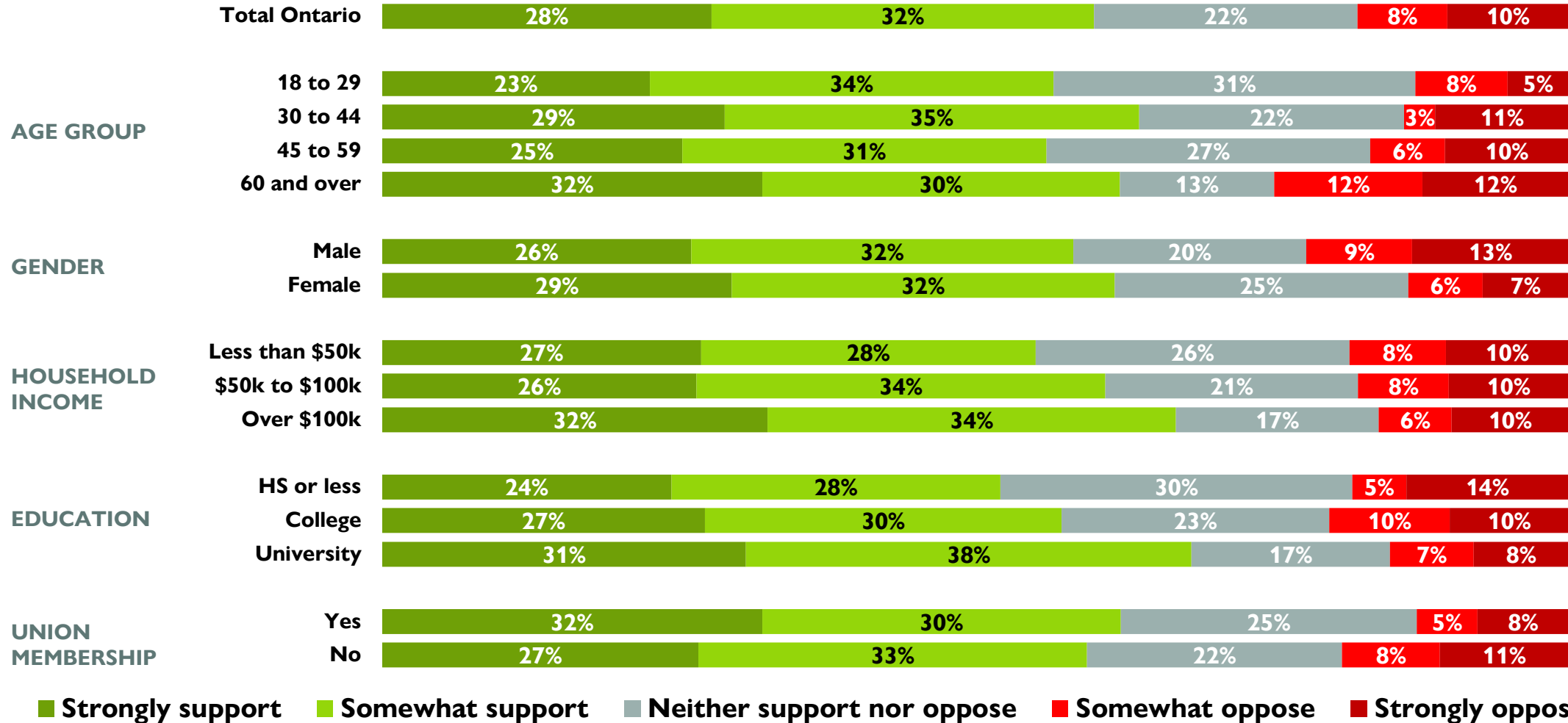
The federal government has announced a plan that they will require 100% of the new vehicles sold in Canada be zero-emissions by 2035. They will also require vehicle manufacturers to meet interim targets of 20% of new vehicle sales being zero-emissions by 2026, and 60% by 2030. Do you support or oppose the federal government taking steps to ensure vehicle manufacturers produce and sell more zero-emission vehicles and face financial penalties if they do not?

SUPPORT FOR PENALTIES



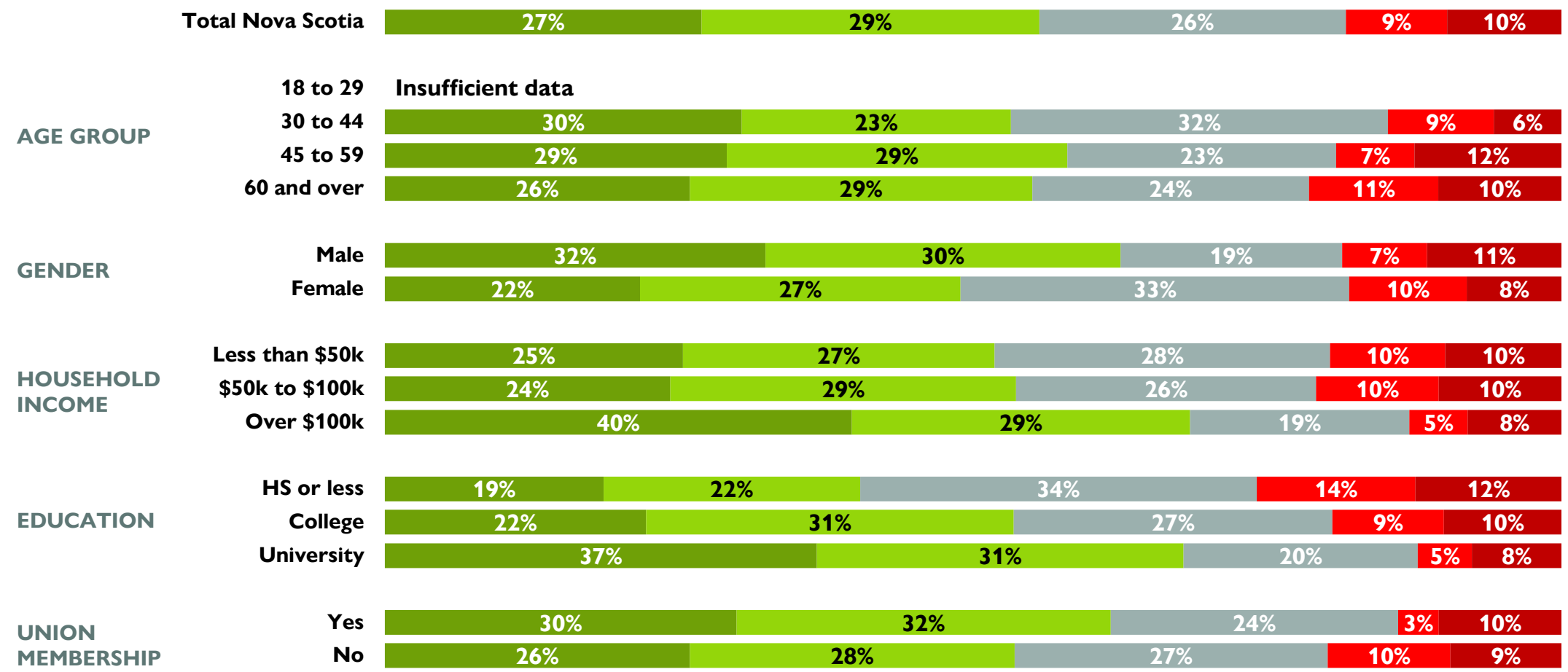
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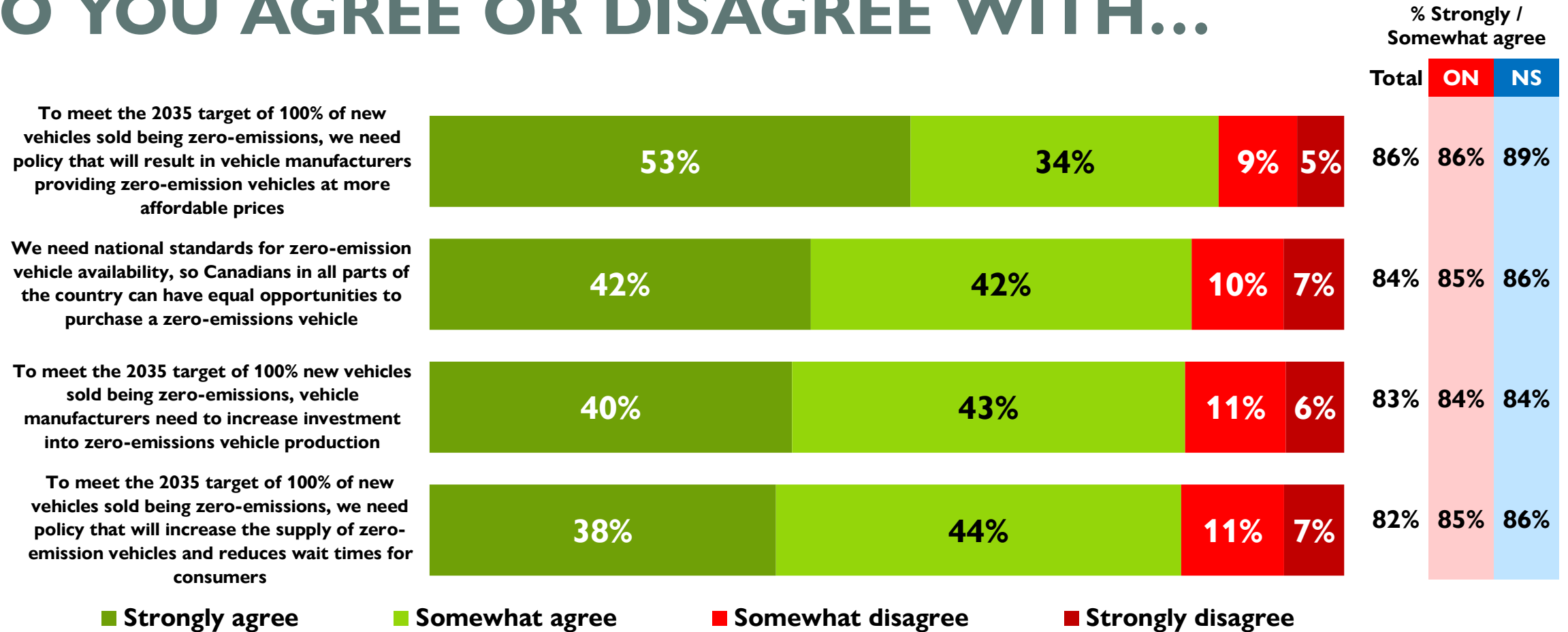
SUPPORT FOR PENALTIES



■ Strongly support
 ■ Somewhat support
 ■ Neither support nor oppose
 ■ Somewhat oppose
 ■ Strongly oppose

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DO YOU AGREE OR DISAGREE WITH...

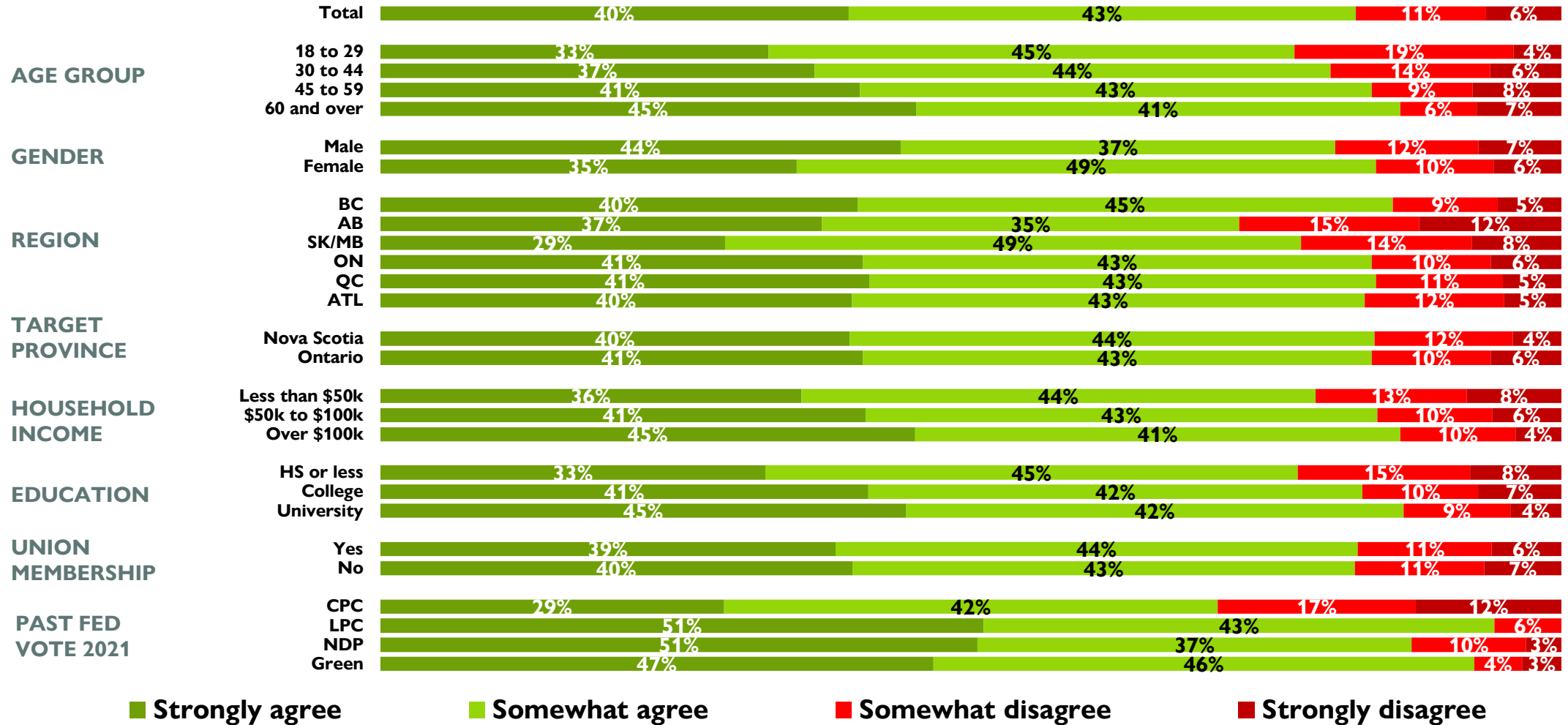


Canadians are much more supportive of the outcomes of the policy to meet these targets. Above all else, there is widespread support for increasing affordability of these vehicles. Over 80% also support national standards so Canadians in all parts of Canada can have equal access to zero-emission vehicles,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

Do you agree or disagree with the following statements?

DO YOU AGREE WITH...

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

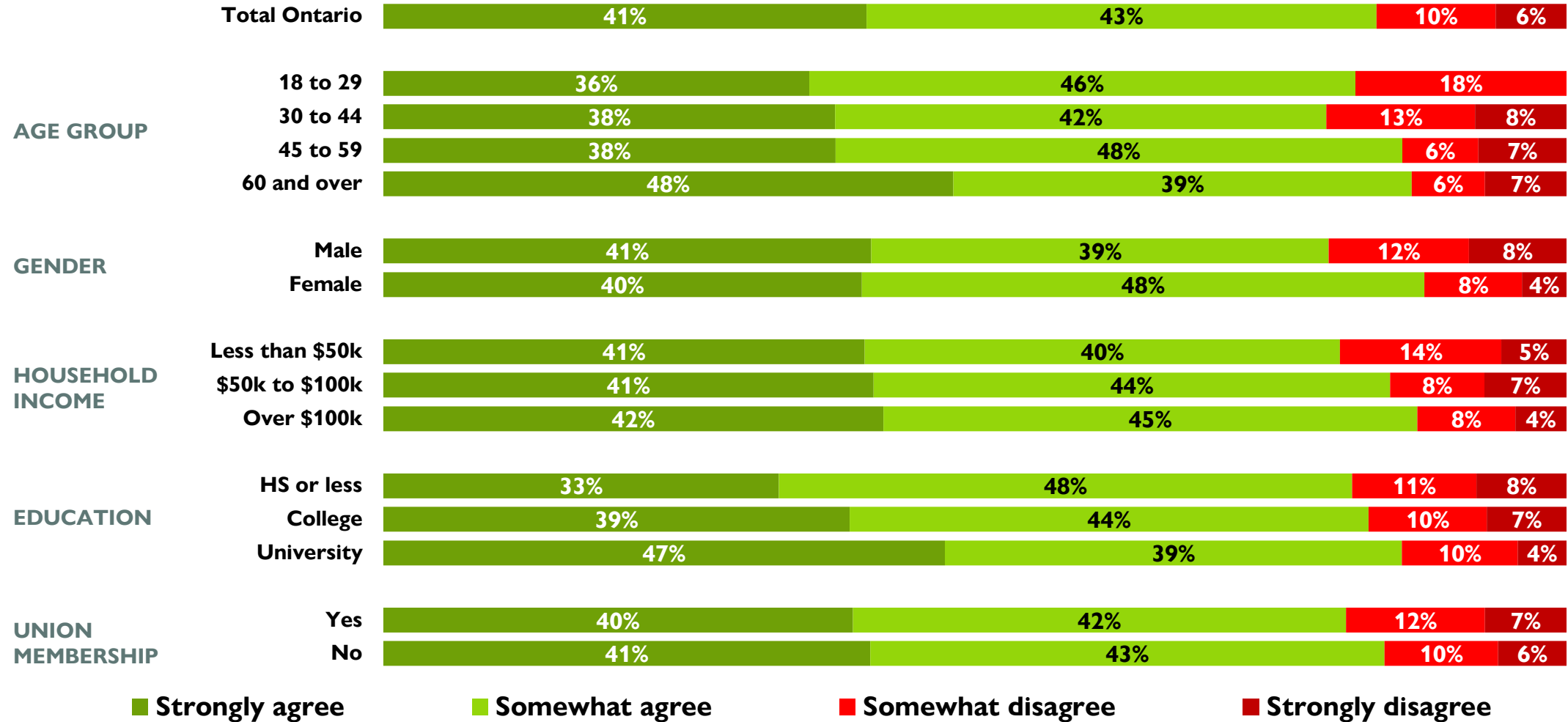


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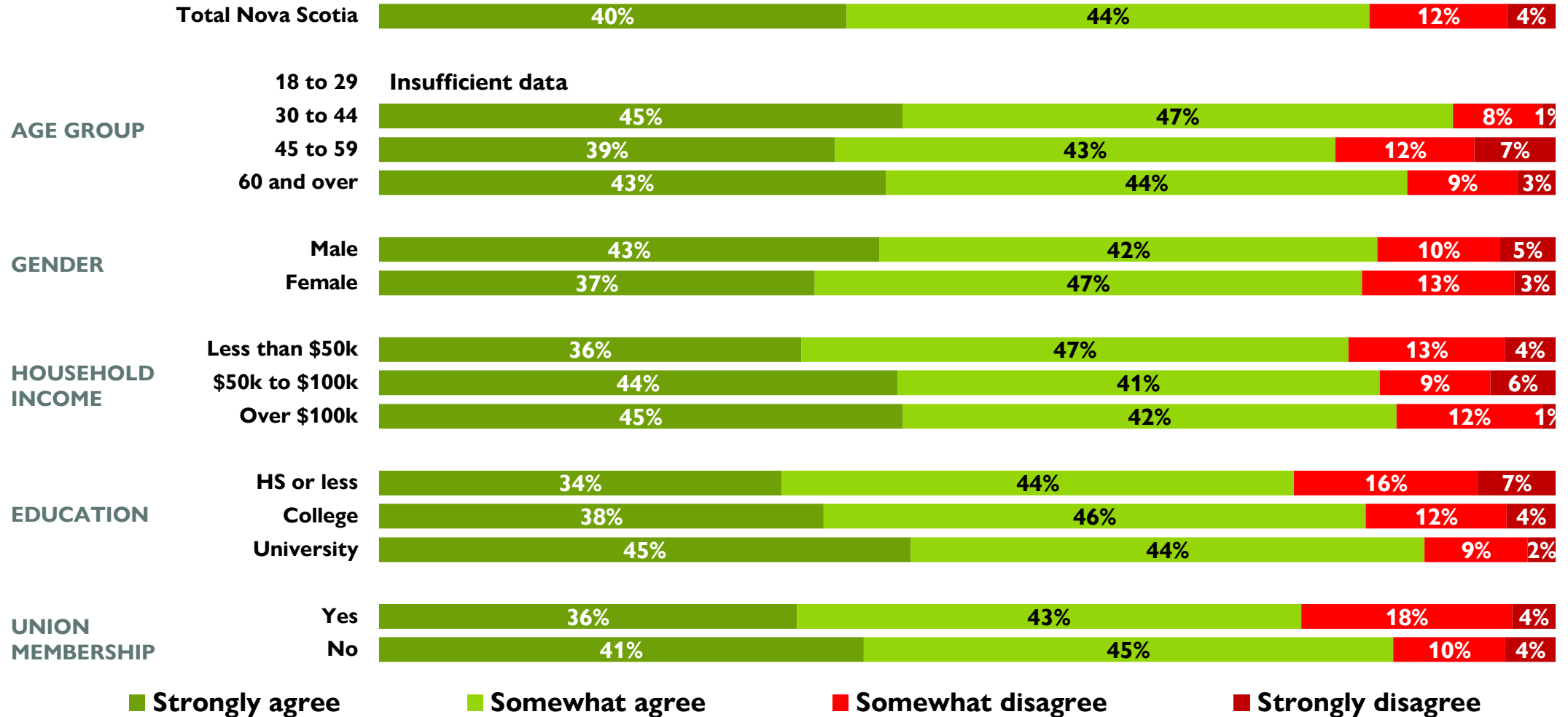
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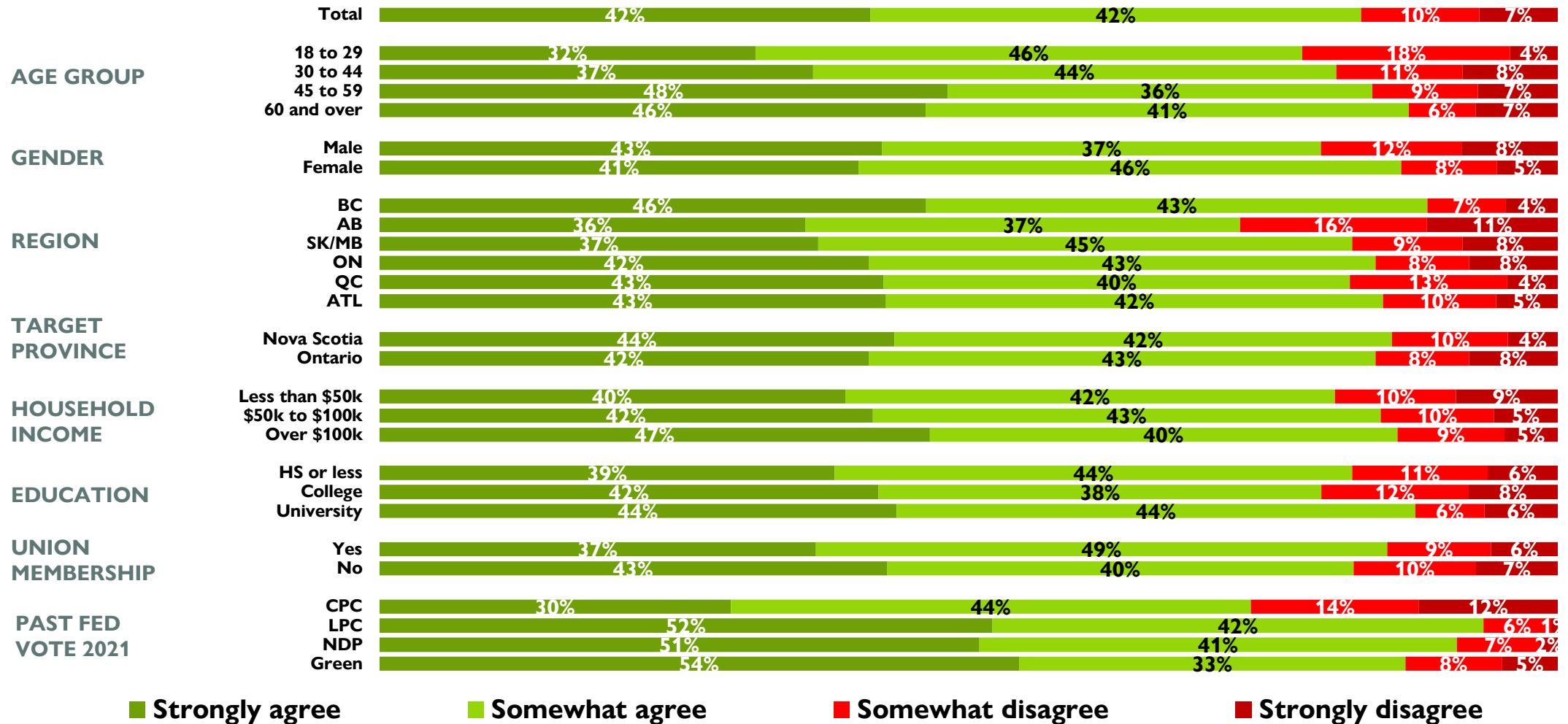
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Do you agree or disagree with the following statements?

DO YOU AGREE WITH...

“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”

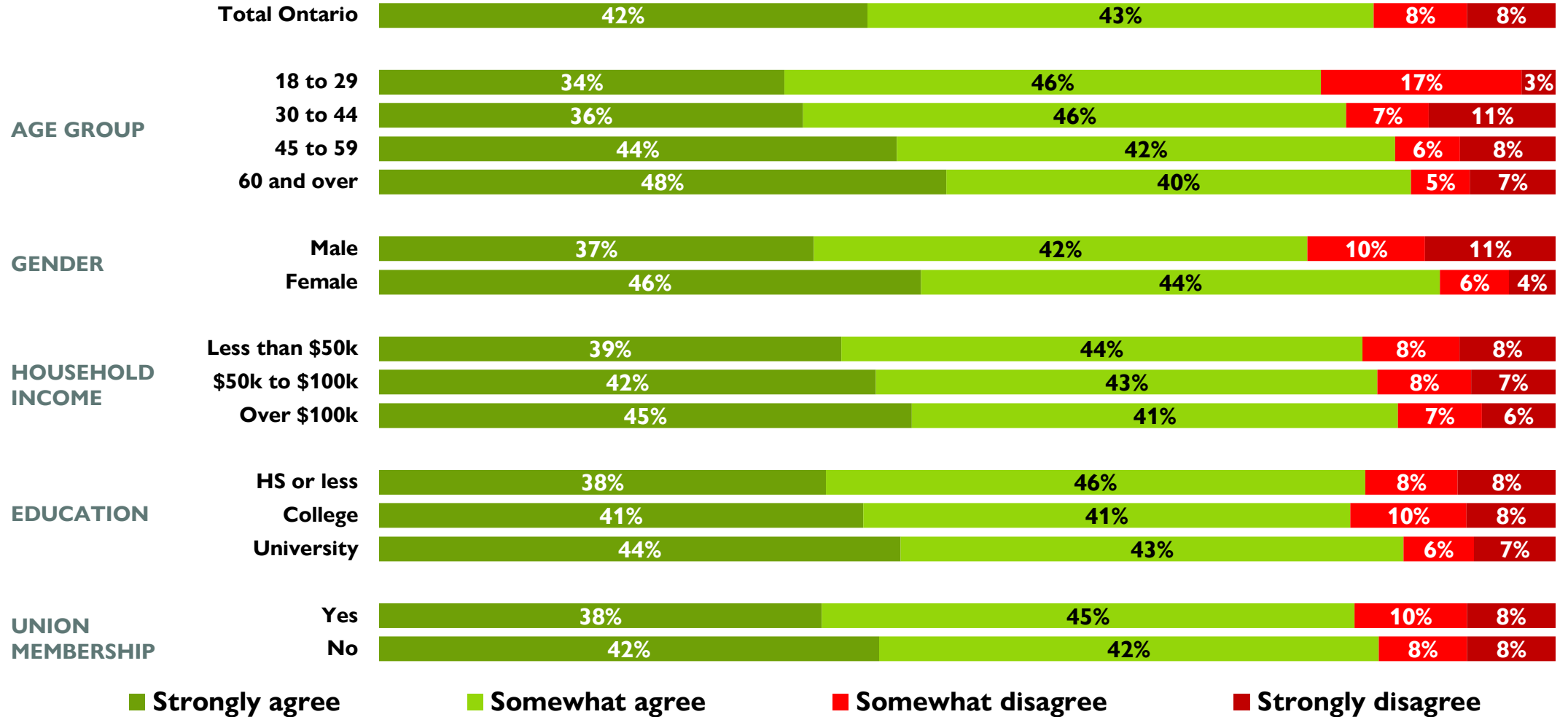


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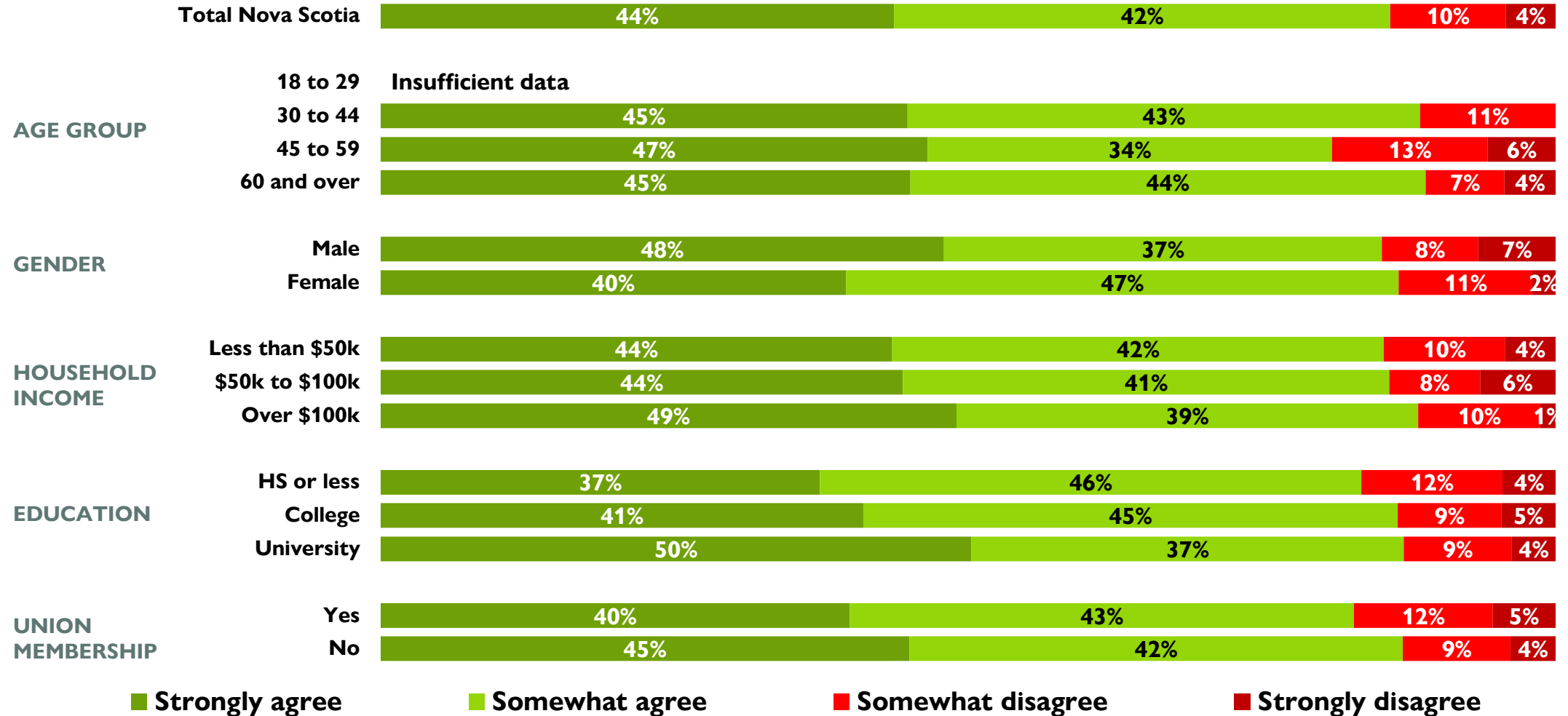
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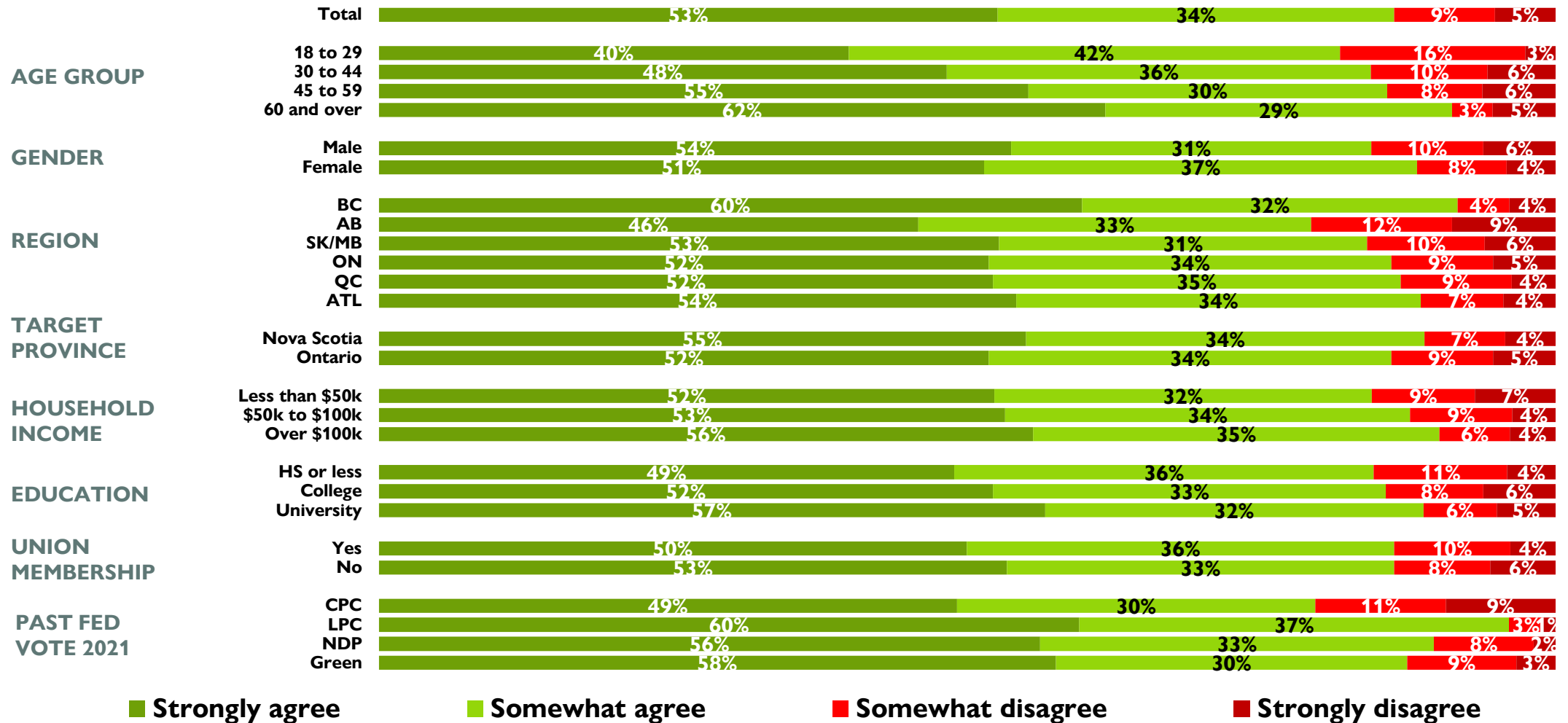
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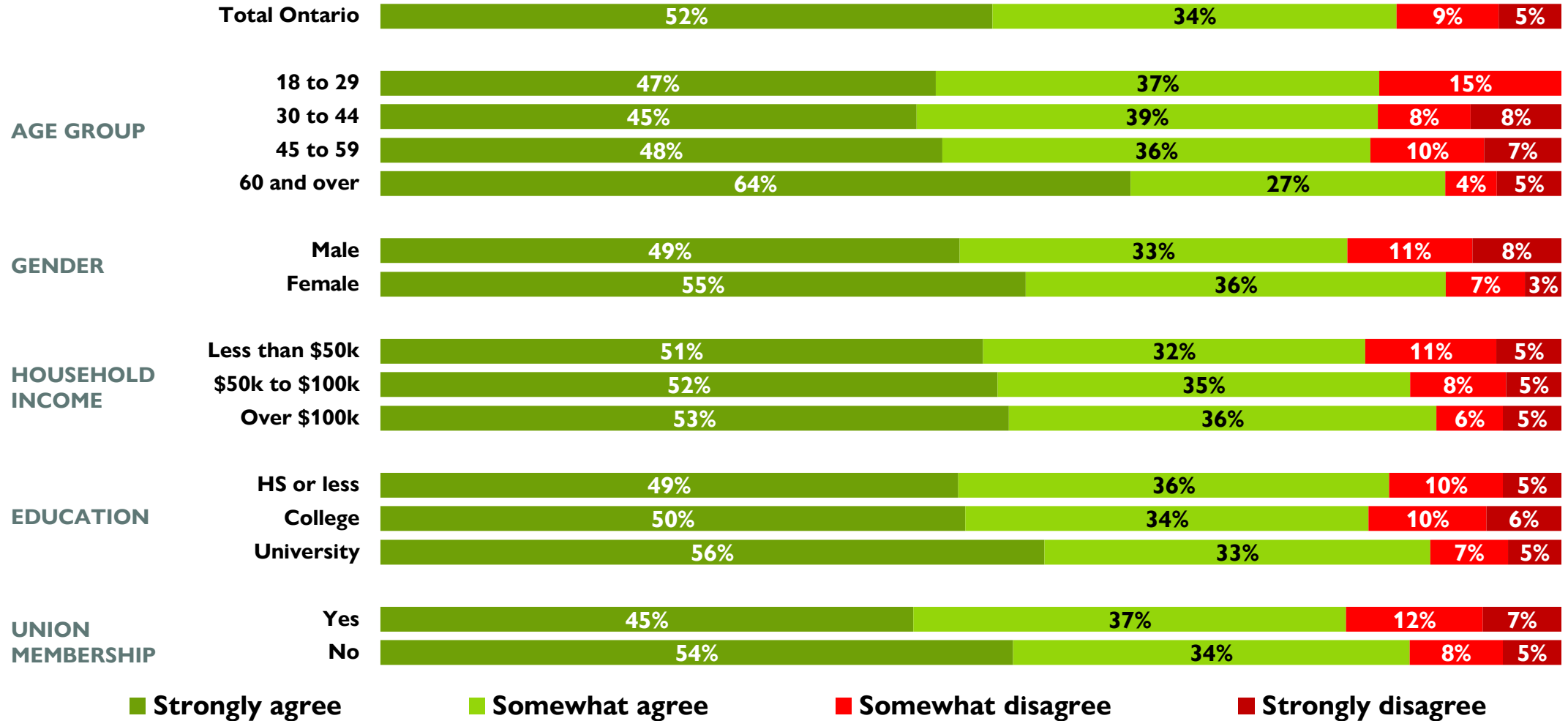
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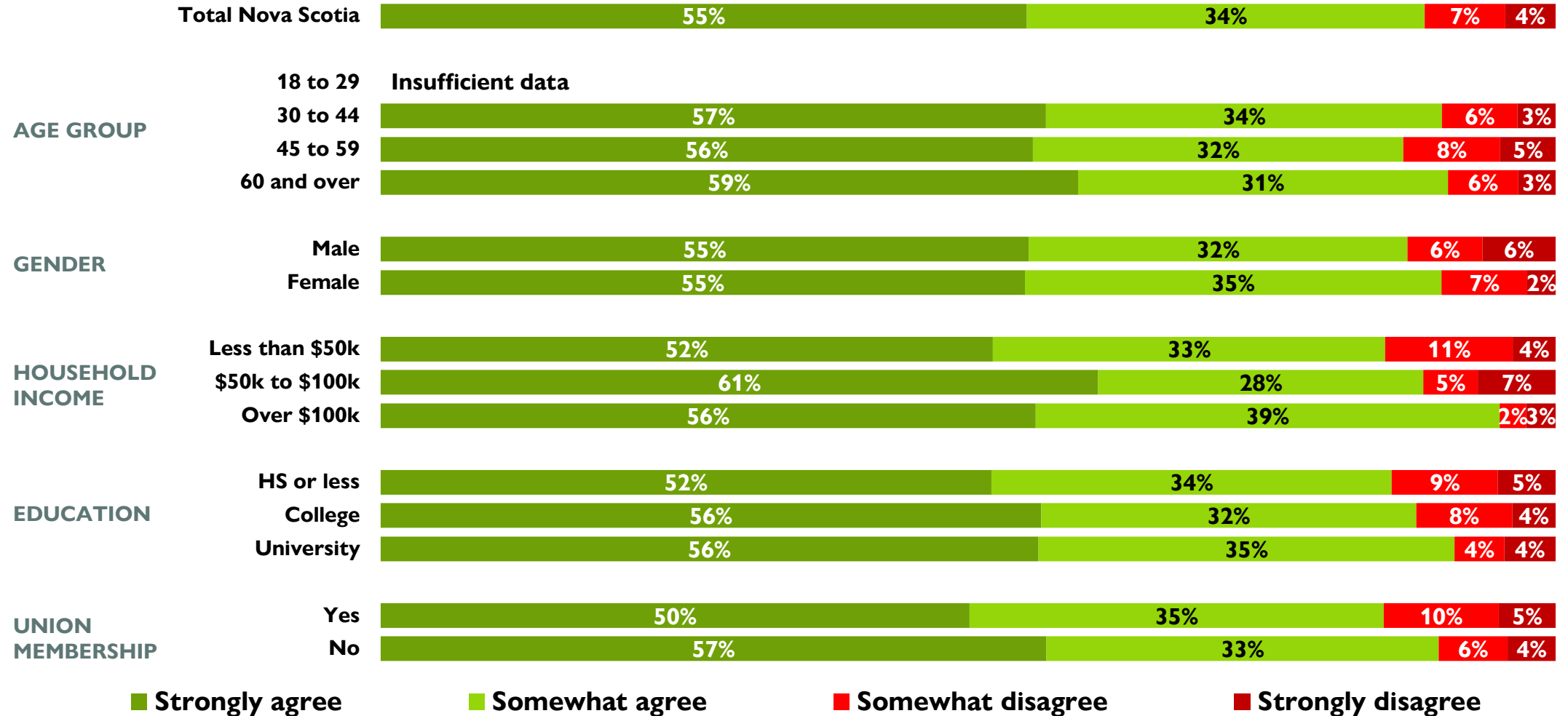
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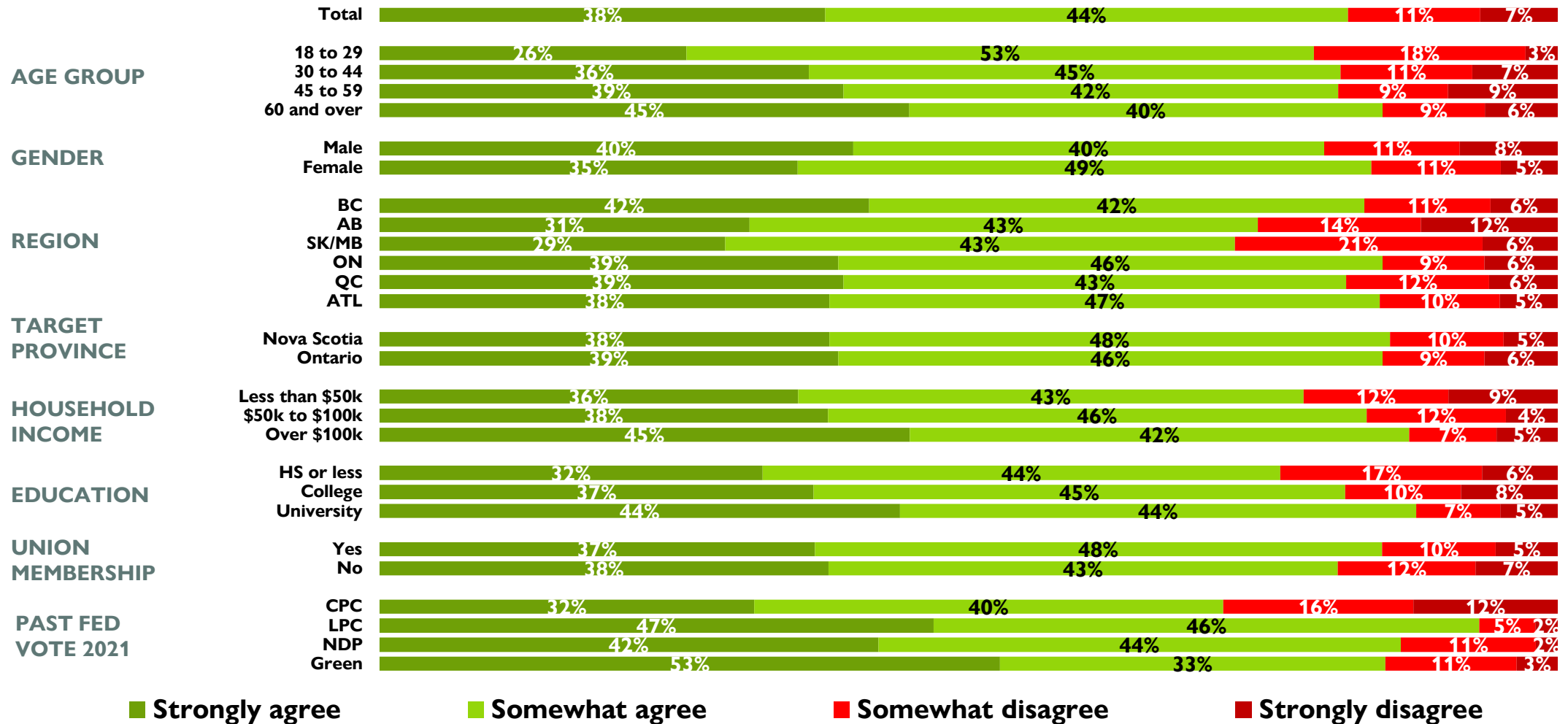
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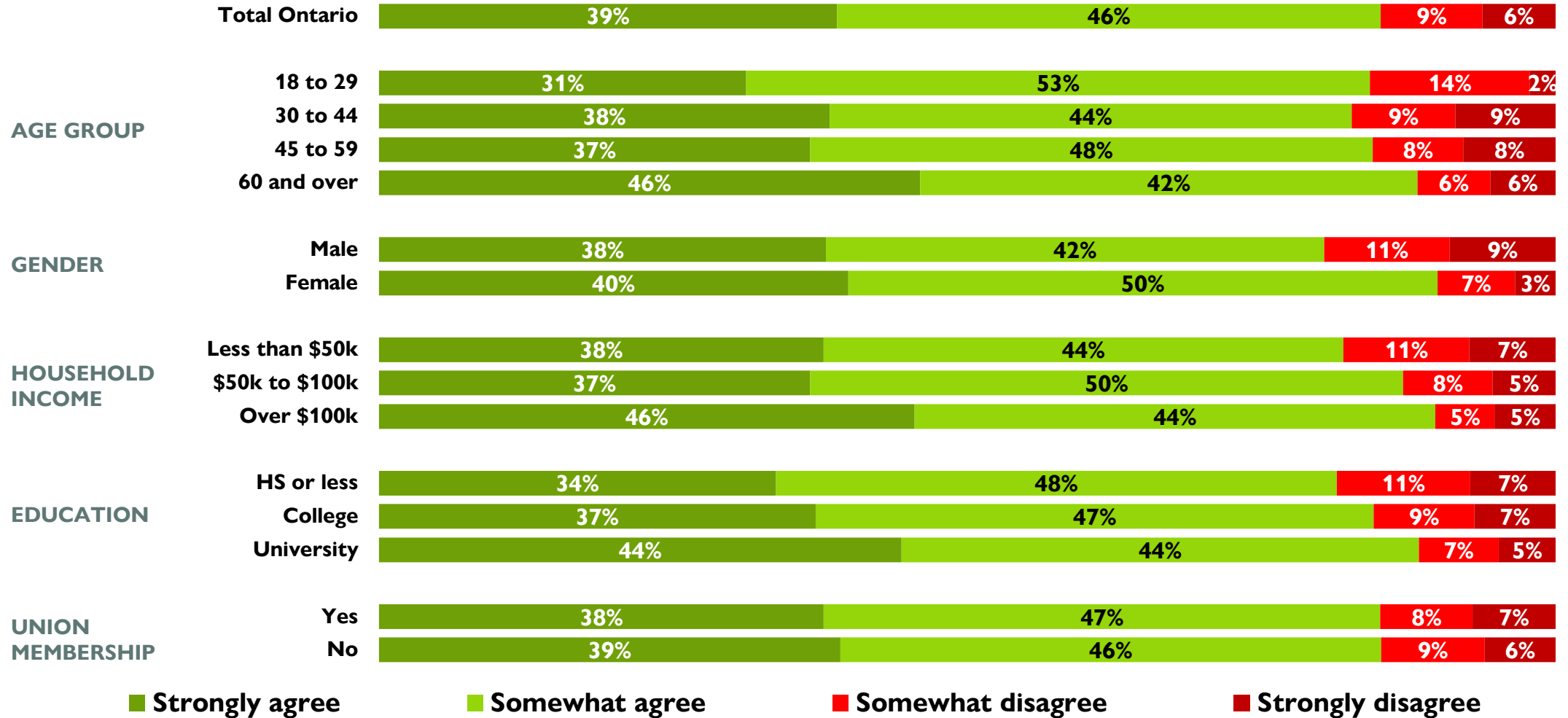


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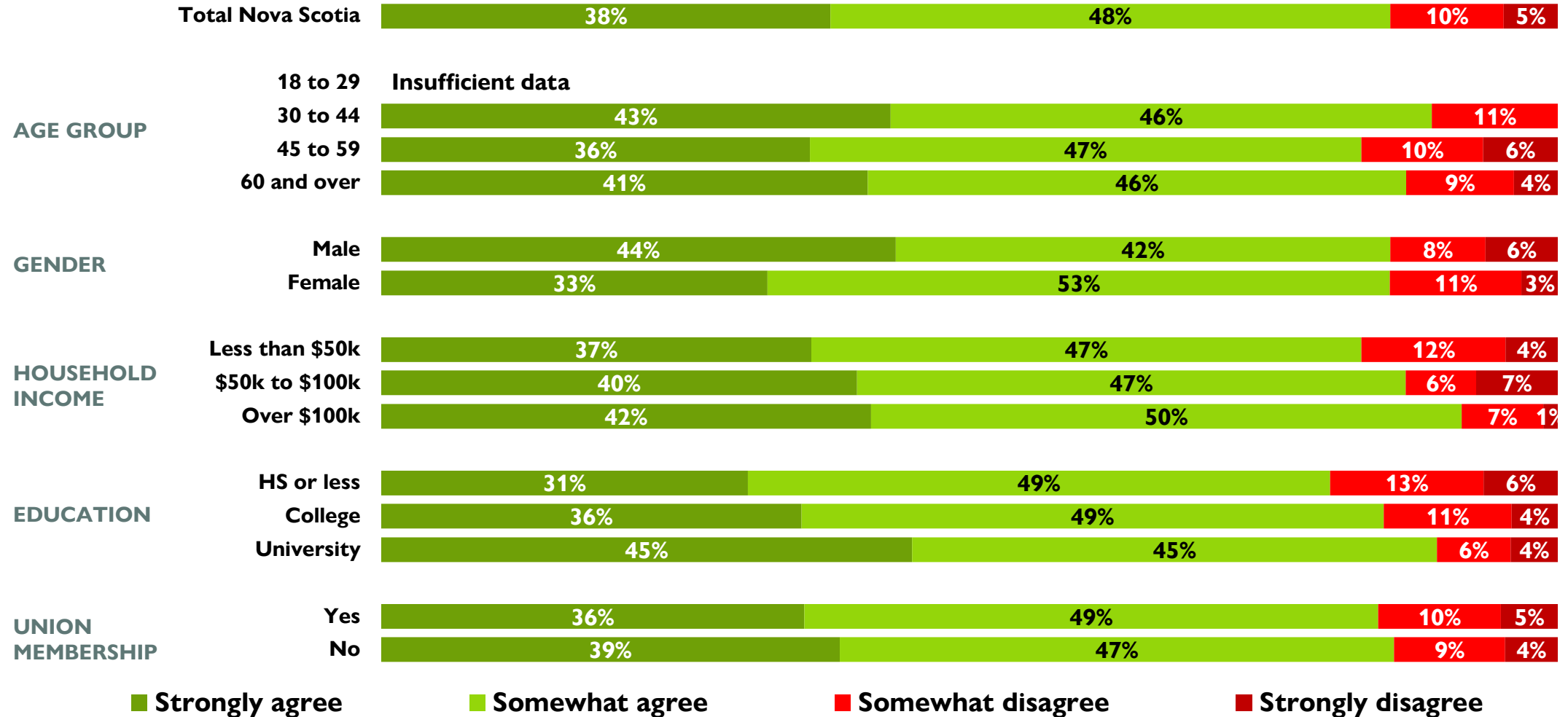
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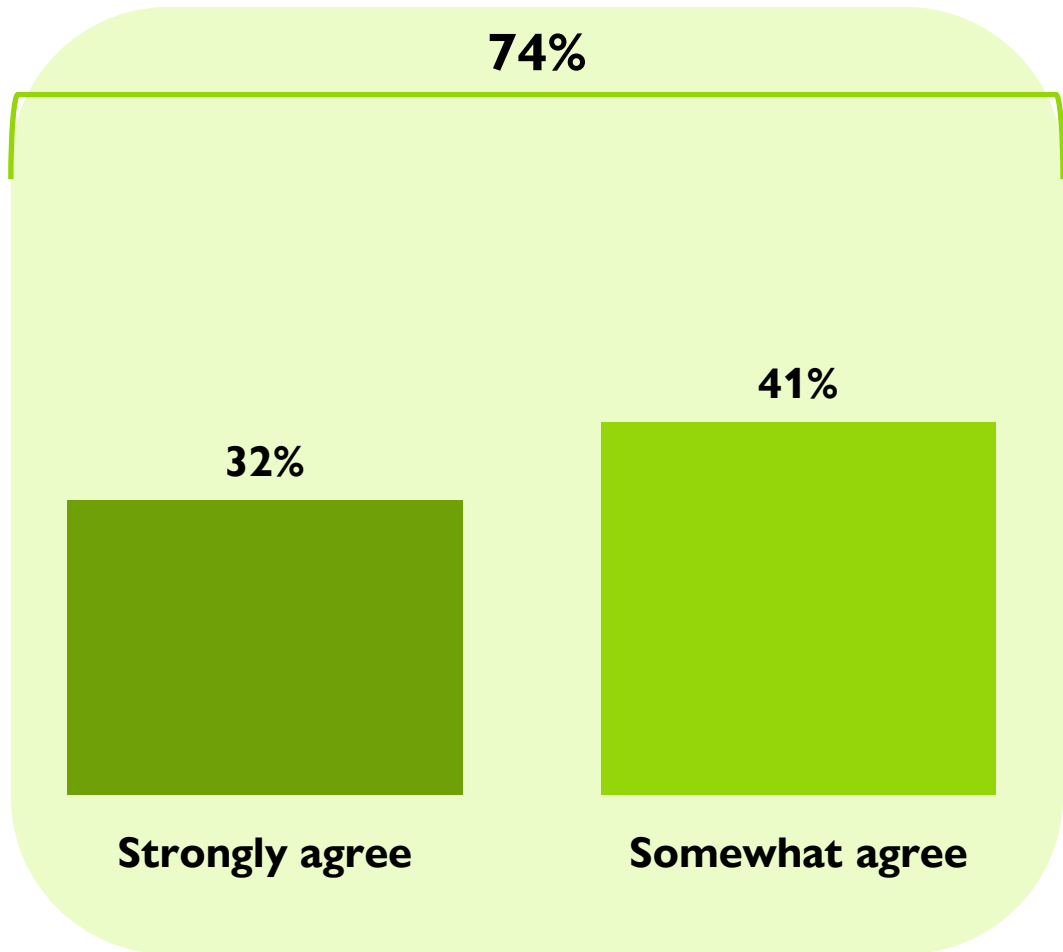
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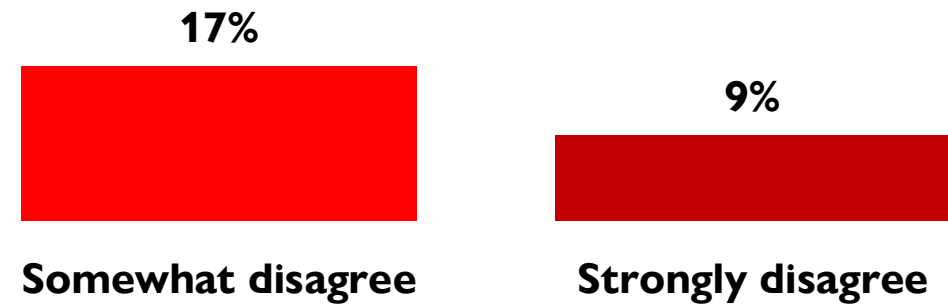


Do you agree or disagree with the following statements?

“I BELIEVE VEHICLE MANUFACTURERS HAVE A RESPONSIBILITY TO INCREASE ZERO-EMISSIONS VEHICLE PRODUCTION, AND SHIFT AWAY FROM PRODUCING GASOLINE-POWERED VEHICLES, EVEN IF IT HAS A NEGATIVE IMPACT ON THEIR PROFITS”

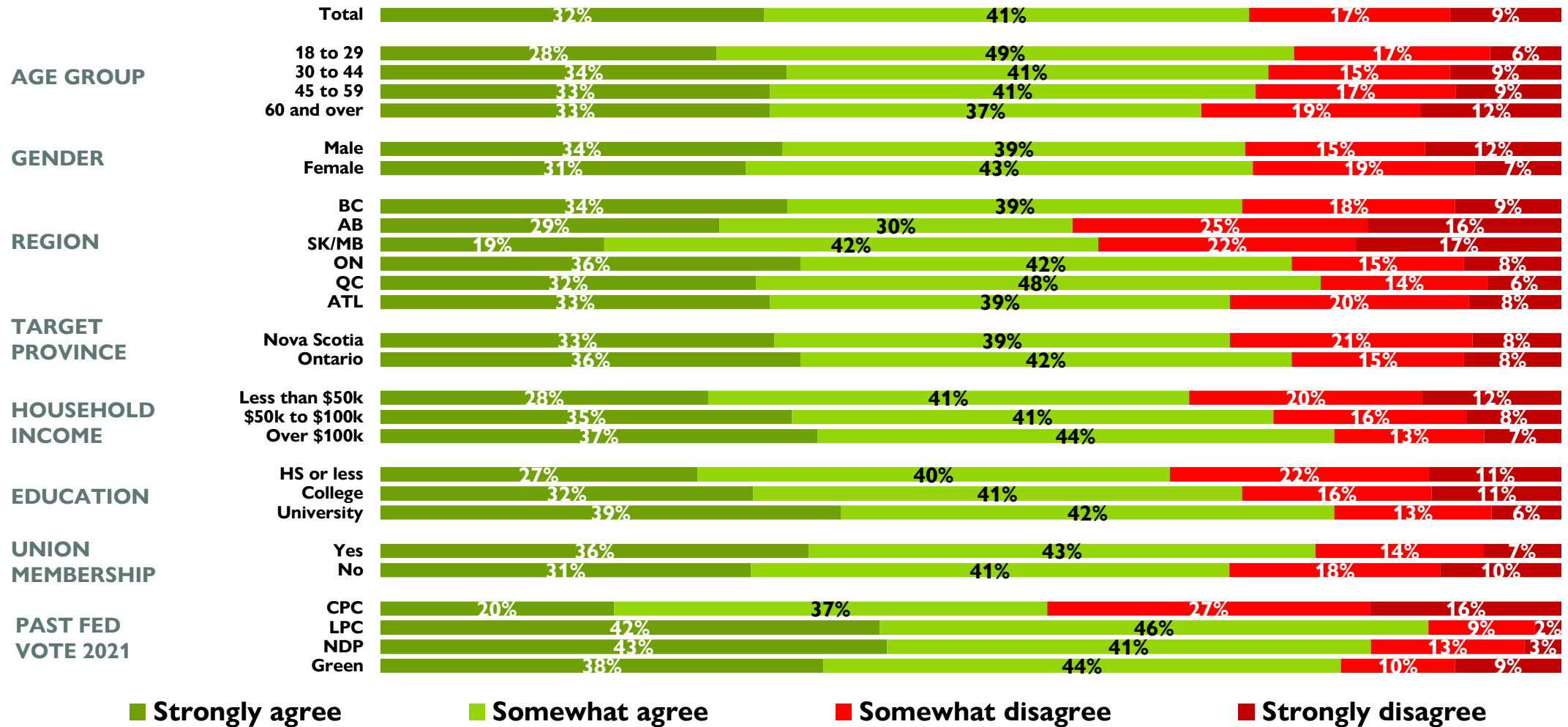


While support for penalties may not be as strong, the majority of Canadians see vehicle manufacturers having a responsibility to increase zero-emissions vehicle production even if it means forgoing profits.



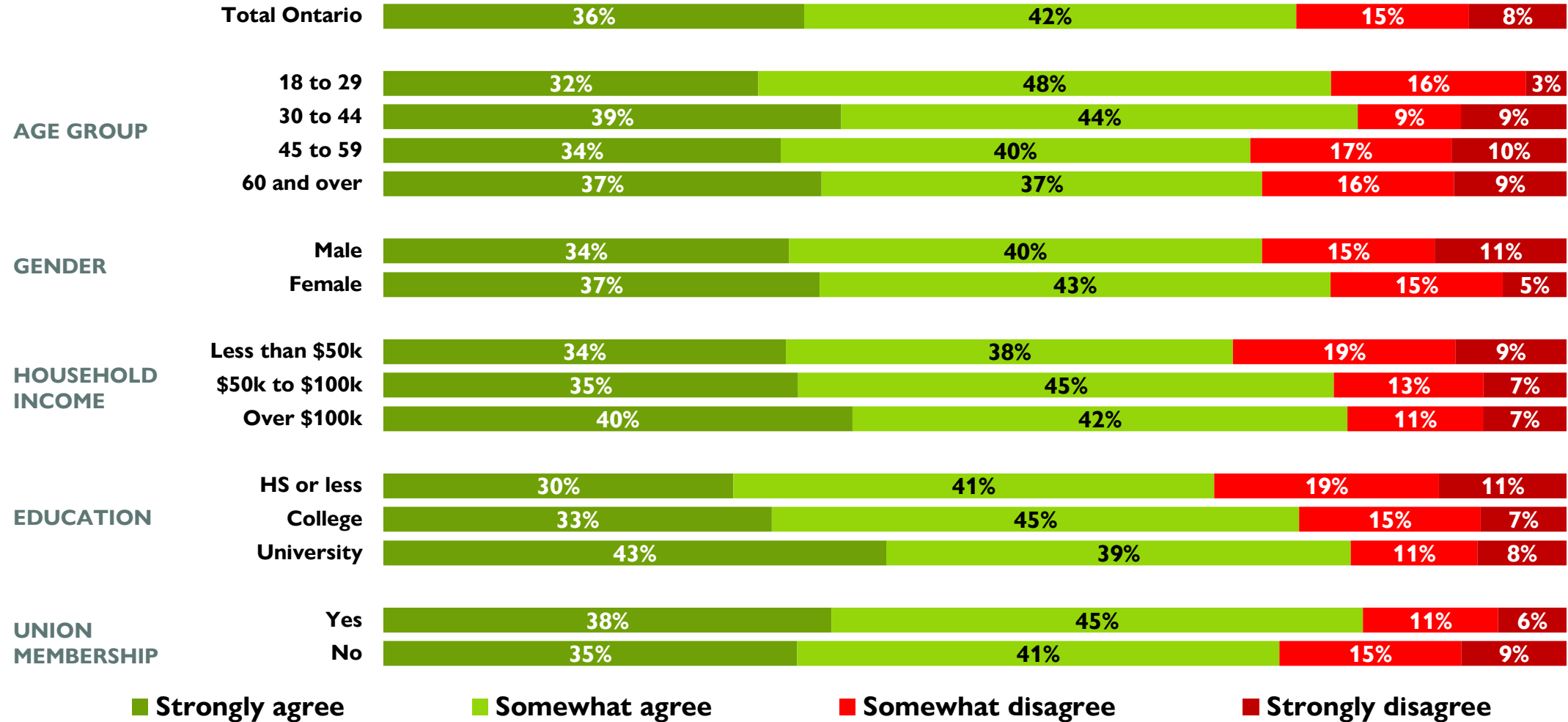
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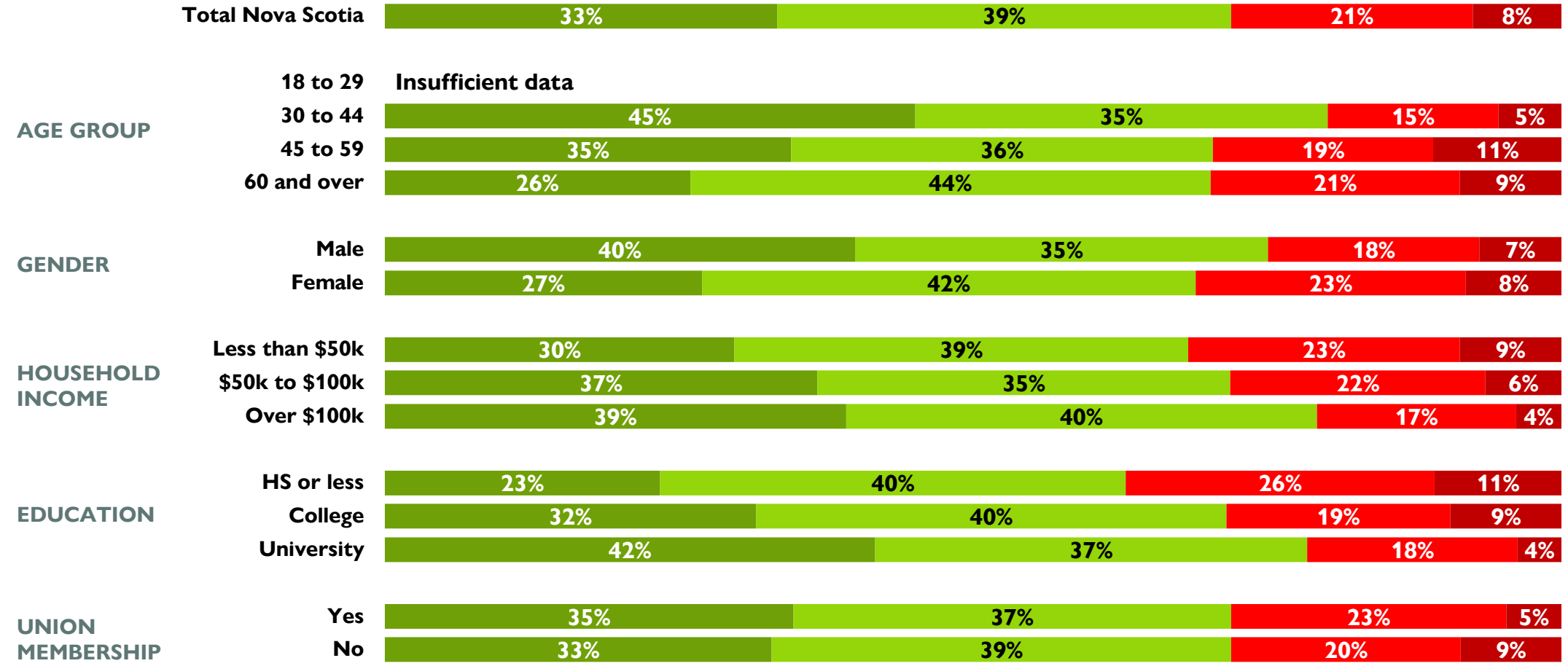
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