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Canadians' Awareness, Knowledge and Attitudes Related to Zero-Emission Vehicles (ZEVs) – 2026

Final Report

Prepared for Natural Resources Canada

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Canada 

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This research report presents the results of an online survey conducted by EKOS Research Associates Inc. on behalf of Natural Resources Canada. The research involved an online survey of 3,035 Canadians. The survey was conducted across Canada in both official languages. The field dates for the survey were January 5 to 26, 2026.

Cette publication est aussi disponible en français sous le titre : Sensibilisation, connaissances et attitudes des Canadiens par rapport aux véhicules à émission zéro (VEZ) – 2026.

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SUMMARY

A. BACKGROUND AND OBJECTIVES

The Government of Canada's 2026 Automotive Strategy positions Canada to attract investment, reinforce domestic supply chains, and lower costs for drivers and fleets. The Strategy includes commitments to introduce stronger greenhouse gas emission standards for vehicles, putting Canada on a path to achieve a goal of 75% EV sales by 2035 and 90% EV sales by 2040.

On-road transportation accounts for about 20 percent of Canada's total greenhouse gas emissions. Reducing transportation emissions is critical to achieving the Government's climate change commitments and is consistent with the global shift toward zero-emission vehicles (ZEVs).

For Canada to achieve the transition to ZEVs, consumer awareness, knowledge, and acceptance of new ZEV technologies have been acknowledged by all stakeholders as critical.

Although various parties in Canada have conducted sporadic consumer surveys over the past decade that seek to measure these factors in the Canadian general public, these have not been designed as a baseline to be repeated consistently over time, so comparison between years of the fast-evolving consumer perspectives on ZEVs cannot be undertaken with scientific rigour.

NRCan commissioned EKOS Research Associates to undertake a fourth survey of Canadians examining their awareness, knowledge and confidence in ZEVs. The first NRCan baseline survey of Canadians on their awareness, knowledge and confidence in ZEVs was conducted in the summer of 2021 (July 16 to August 3, 2021), and the survey, including a few changes, was repeated in the fall of 2022 (September 9 to October 4, 2022) and winter of 2024 (January 17 to February 7, 2024). The current survey was also collected in the winter (January 5 to 26, 2026)

The survey was specifically designed to be repeated on an annual or bi-annual basis to provide key performance indicators on the success of efforts to increase consumer intention and action on the purchase of ZEV technologies. This year's results will provide an update to the previous

surveys for key performance indicators and key market data to measure and track impacts and progress resulting from government and partner investments to foster ZEV adoption.¹

B. METHODOLOGY

The research involved an online survey of 3,035 Canadians 18 years of age and older. The survey was conducted across Canada in both official languages. The field dates for the survey were January 5 to 26, 2026.

Appendix A contains a detailed description of the methodology used in this study.

Appendix B contains the full survey questionnaire.

C. KEY FINDINGS

Survey results reveal that Canadians hold mixed views on ZEVs, with persistent uncertainty about key aspects of ownership. As was found in previous surveys, most Canadians believe that ZEVs are beneficial for the environment, but a clear majority view them as too expensive.

Concerns about charging infrastructure and vehicle range remain widespread, including perceptions that there are too few public charging stations and that ZEVs cannot travel far enough on a full charge. Many also question winter performance and resale value. While some Canadians believe ZEVs can offer long-term savings, a significant proportion indicate they would only consider purchasing one if prices were comparable to conventional vehicles, and many say they would only do so as a secondary household vehicle. Exposure to ZEVs has risen substantially, but, as in previous years, uncertainty persists around issues such as charging capacity, maintenance costs, and resale value, suggesting these are areas in need of increased ZEV awareness/education initiatives.

¹ As discussed later in this report, the timing of this year's survey is similar to that collected in 2024, how it is different than the timing of surveys conducted in 2021 and 2022 .

Highlight Results

Survey results suggest that although there is some interest in ZEVs among Canadians, increased education and awareness efforts will be required to overcome some of the concerns about ZEVs (e.g., charging, reliability, costs to run and maintain). As shown by some examples of the key comparative results in the table below, tracking reveals a significant increase in exposure and familiarity with ZEVs, stagnant interest in the purchase/lease of a ZEV, as well as a substantial decrease in interest in taking a ZEV for a test drive. Importantly for those working to advance ZEV adoption, concerns about many aspects of ZEVs – particularly range and winter performance – have not improved over the past two years.

Table 1: Highlight results

Statement/Question	2021 % Yes/Agree	2022 % Yes/Agree	2024 % Yes/Agree	2026 % Yes/Agree	Change from 2024 +/-
Have you ever driven or ridden in a zero-emission vehicle?	32%	39%	42%	59%	+17%
Do you know an owner of a zero-emission vehicle?	46%	54%	62%	68%	+6%
Have you considered purchasing or leasing a zero-emission vehicle for your household?	51%	51%	36%	34%	-2%
ZEVs can't travel far enough on a full charge	44%	49%	56%	58%	+2%
ZEVs perform poorly in cold weather	28%	37%	59%	58%	-1%
Interested in taking a ZEV for a test drive	67%	62%	48%	35%	-13%
Too few charging stations where I drive	53%	55%	62%	57%	-5%

These and other survey results can help the Government of Canada and all ZEV stakeholders focus the content and messaging in their awareness and education activities in the coming months and years. There are clearly a wide variety of opportunities to fill gaps in knowledge and understanding related to ZEVs, particularly where there are clear misperceptions, and where large numbers of respondents have indicated they are “unsure”.

Survey Context

A few contextual factors should be considered when interpreting the 2026 survey results and comparing any significant changes in Canadians' attitudes and awareness of ZEVs from 2024, and in particular 2021 and 2022 surveys. These contextual factors include:

- **Seasonality:** 2024 and 2026 surveys were conducted in the winter, while the 2021 and 2022 surveys were conducted in the summer and fall, respectively. Winter driving experiences and concerns may be more top of mind for respondents when surveyed in the winter. In addition, media reports indicating that ZEVs lose driving range in the winter are typically less prevalent in other seasons.
- **ZEV-related policy announcements:** Toward the end of collection of the 2026 survey, an announcement was made about the deal struck between Canada and China to allow Chinese-made ZEVs into the Canadian market. A comparison of the results collected after this announcement does not appear to have a significant impact on reported perceptions or behaviour.
 - The 2024 survey was conducted shortly after the announcement of Canada's Electric Vehicle Availability Standard (December 2023) – a federal regulation requiring that by 2035, 100% of new light-duty vehicles for sale in Canada must be zero-emission vehicles. This announcement received a significant amount of media attention, much of it negative in tone, and likely heightened Canadians' awareness of (and potentially opposition to) ZEVs.
- **Interest rates:** Increases in inflation and interest rates, compared to rates during survey periods in 2021 and 2022, may have impacted survey results for 2024 and 2026, due to impacts on affordability.

All of these factors may explain at least some of the decrease in attitudes and consumer interest in the purchase/lease of ZEVs seen in this year's survey.

Outlined below are key findings from this study, organized by topic area. The remainder of this report describes survey results in more detail.

Intention to Purchase/Lease a Vehicle

Respondents were first asked if they plan to purchase or lease any type of new or used vehicle in the next 10 years. More than six in ten Canadians (63 per cent) say they do intend to purchase a vehicle within the next 10 years. This result represents a five-point decline since 2021.

When asked in what timeframe they plan to purchase a vehicle, most of these respondents indicated either within the next 2 years (40 per cent) or within the next 2-5 years (39 per cent). Tracking reveals that while overall interest in getting a vehicle in the next 10 years has declined slightly, there has been an increase in the proportion who plan to purchase/lease a vehicle in the next 2 years (from 30 per cent in 2024 to 40 per cent in 2026).

A plurality of these respondents who plan to purchase a car in the next 10 years anticipate the total cost of the vehicle will be in the \$25,000-\$39,999 range. A narrow plurality (38 per cent) intend to purchase a new vehicle, rather than used, a 5-point increase since 2024. When asked what type of vehicle they are considering purchasing or leasing, small SUVs, midsize SUVs, and midsize cars are mentioned most often.

A plurality of Canadian households say they own one car, while 34 per cent own two vehicles and 11 per cent own three or more.

Vehicle Usage

Those who own at least one vehicle were asked a number of questions about their vehicle usage. Just over one in three say they drive their vehicle fewer than 99 kilometres during a typical week (36 per cent), while a fairly large proportion (28 per cent) drive their vehicle between 100 and 199 kilometres per week.

Most of these respondents (60 per cent) say they drive their vehicle fewer than 99 kilometres on a typical weekend (60 per cent), while one in four (25 per cent) say they drive their vehicle between 100 and 199 kilometres. Turning to vehicle usage on vacation, results reveal that many respondents who own a vehicle say they drive their vehicle 600 kilometres or more in a single day on vacation (35 per cent), although one in ten (10 per cent) do not use their vehicle on vacation at all.

Ownership and Intention to Purchase/Lease an Electric Vehicle

Among those who have a vehicle in their household, one in ten (nine per cent) say they own or lease a zero-emission vehicle that runs on electricity (ZEV), an increase of four percentage points since 2021. One in three Canadians (33 per cent) say they are very or somewhat likely to purchase a ZEV as (33 per cent), while most say it is very or somewhat unlikely (34 per cent).

Among those who do not own or lease a zero -emission vehicle, one in three (34 per cent) indicated that they had considered purchasing a ZEV, consistent with the 2024 survey findings,

but down significantly from 51 per cent in 2021 and 2022. When asked what information would be of greatest interest to them if they were considering purchasing or leasing a ZEV, driving range was mentioned most often (51 per cent), followed by purchase price (46 per cent), driving range in cold weather (42 per cent), battery life expectancy (45 per cent), and winter performance (37 per cent).

Experience with Zero-Emission Vehicles

Four in ten Canadians (39 per cent) say they have either driven or ridden in a ZEV. A large majority of these respondents (93 per cent) indicated that they have been a passenger, while more than a third (36 per cent) said they have been a driver.

When asked how their experience with a ZEV compares to that of a gas-powered vehicle, approximately half of these respondents (48 per cent) indicated that it was about the same. When asked to explain in what way their ZEV experience compared, a third of respondents (29 per cent) said it was quieter; followed by good acceleration time, speed, or torque (11 per cent); and a smooth or comfortable ride (9 per cent).

Among those respondents who have not ridden in a ZEV, more than a third (35 per cent) said they would be somewhat or very interested in taking a test drive, down from 48 per cent in 2024. Among those who would not be interested, the most common reason cited was they had no intention of buying a ZEV (80 per cent, up significantly from 68 per cent in 2024).

Those who do not own or lease a ZEV were asked what experiences/actions they have had with ZEVs. The most common responses involved talking to a friend/family member/colleague about ZEVs (40 per cent, close to 44 per cent in 2024), or reading a negative (29 per cent, down significantly from 42 per cent 2024) or positive (27 per cent, down from 34 per cent in 2024) news story about these vehicles.

Nearly seven in 10 (68 per cent) indicated they know an owner of a ZEV, an increase of 14 percentage points from 2022. When respondents were asked, unprompted, to name any ZEV make and model they were aware of, Tesla is mentioned most often (55 per cent).

Views on Zero-Emission Vehicle Features

Respondents were asked a number of attitudinal questions about ZEVs. A clear majority of Canadians (73 per cent) believe that ZEVs are too expensive, while only 38 per cent of Canadians agree that gas/diesel vehicles are too expensive. Just over half (55 per cent) agree

that ZEV contribute significantly to a reduction of greenhouse gas emissions and air pollutants compared to gas or diesel-powered vehicles, and just under half (48 per cent) agree that ZEVs are less damaging to the environment than gas or diesel-powered vehicles.

More than half of Canadians (57 per cent) agree that there are too few, if any, publicly available charging stations where they drive. More than half express concerns that ZEVs cannot travel far enough on a full charge (58 per cent). Fewer than half agree that they can charge a ZEV at their home (48 per cent), and even fewer agree they can charge a ZEV at their workplace (19 per cent). In addition, half of Canadians worry that if too many people purchase ZEVs it will put too much pressure on the electric grid (50 per cent). Less than half also agree that charging a ZEV at home will significantly increase their monthly electricity bill (43 per cent).

There is also a significant proportion who feel that ZEVs perform poorly in cold weather (58 per cent).

Four in ten (38 per cent) believe a ZEV would save them money in the long run, and one in three (33 per cent) say they would only buy a ZEV as a second vehicle for their household, while keeping a gas or diesel-powered vehicle as well.

One in four (24 per cent) feels that the style or type of vehicle they prefer is not available as a ZEV, but many are unsure. Nearly a quarter (24 per cent, up from 18 per cent since 2024) feel there is an affordable ZEV available that meets their lifestyle needs, but again, many are unsure.

One-quarter (25 per cent) feel the repair and maintenance costs for a ZEV are lower than for a gas or diesel-powered vehicle, and over four in ten (41 per cent, up from 21 per cent in 2024) believe ZEVs have a poor resale value.

Moreover, over four in ten Canadians could not provide a response when asked whether zero-emission vehicles have the same towing ability as conventional vehicles (41 per cent), or whether hydrogen fuel cell electric vehicles are more dangerous than other kinds of vehicles (46 per cent).

One in four (25 per cent) agree that it is difficult to find credible sources of information about ZEVs, and one in five (22 per cent) feel that gas or diesel-powered vehicles are safer than ZEVs.

Respondents were also asked which of a range of statements about the purchase price of a ZEV is closest to their own point of view. Most indicated that they would only buy a ZEV if the price were about the same as an equivalent conventional vehicle (35 per cent, unchanged since

2024). About one in five (17 per cent) would be willing to pay more for a ZEV than an equivalent conventional vehicle. Sixteen per cent indicated they would only buy or lease a ZEV if the price were lower than an equivalent conventional vehicle, and 22 per cent said they would never buy a ZEV.

Canadians were also asked to what extent a range of factors would make them more likely to consider purchasing or leasing a zero-emission vehicle. Equal or greater driving range than a gas or diesel vehicle, proven winter weather performance, having access to a charging station at home, and a 10-year battery warranty were seen as the most important factors in encouraging Canadians to consider purchasing/leasing ZEVs.

Respondents were asked to indicate how much of an impact a series of factors would have on their likelihood to purchase or lease a ZEV. A third (34 per cent) indicated that they would be much less likely to purchase a ZEV if the vehicle were being imported from the US, although the same proportion indicated this would have no impact on their decision. On the other hand, nearly half (46 per cent) said that a vehicle being imported from China would have no impact on their decision.

Awareness and Support for Government Rebates/Mandates

Six in ten Canadians (62 per cent) say they have heard of Canada's Electric Vehicle Availability Standard, a 12-point decline from 2024. Just one in ten Canadians (nine per cent) say they are aware of any Canadian programs or incentives intended to offset tariffs on zero-emission vehicles imported from the US.

Canadians were also asked whether they support or oppose a variety of policies regarding ZEVs. There is strong support for building a national network of charging stations for electric vehicles (66 per cent) and reinstating rebates for the purchase or lease of fully electric or plug-in hybrid electric vehicles (61 per cent). However, only one in three (35 per cent) support a sales mandate ensuring that by a future date, all new vehicles sold must be ZEVs, and just one in four (27 per cent) support the Government of Canada's 100 per cent tariff on Chinese-made electric vehicles.

A clear majority of Canadians say they are either very (24 per cent) or somewhat (39 per cent) familiar with Canadian tariffs imposed on electric vehicles imported from China. A somewhat lesser majority say they are either very (16 per cent) or somewhat (41 per cent) familiar with Canadian counter-tariffs imposed on vehicles imported from the United States. Most Canadians (73 per cent) say these tariffs and trade policies are not affecting their behaviour.

D. CONTRACT VALUE

The contract value for the POR project is \$70,758.67 (including HST).

Supplier Name: EKOS Research Associates

PWGSC Contract Number: CW2423944


Contract Award Date: October 20, 2025

For more information on this report, please contact NRCan at: nrcan.por-rop.rncan@canada.ca

E. POLITICAL NEUTRALITY CERTIFICATION

I hereby certify as Senior Officer of EKOS Research Associates Inc. that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Policy on Communications and Federal Identity and the Directive on the Management of Communications. Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standings with the electorate, or ratings of the performance of a political party or its leaders.

Signed by:



Susan Galley (Vice President)

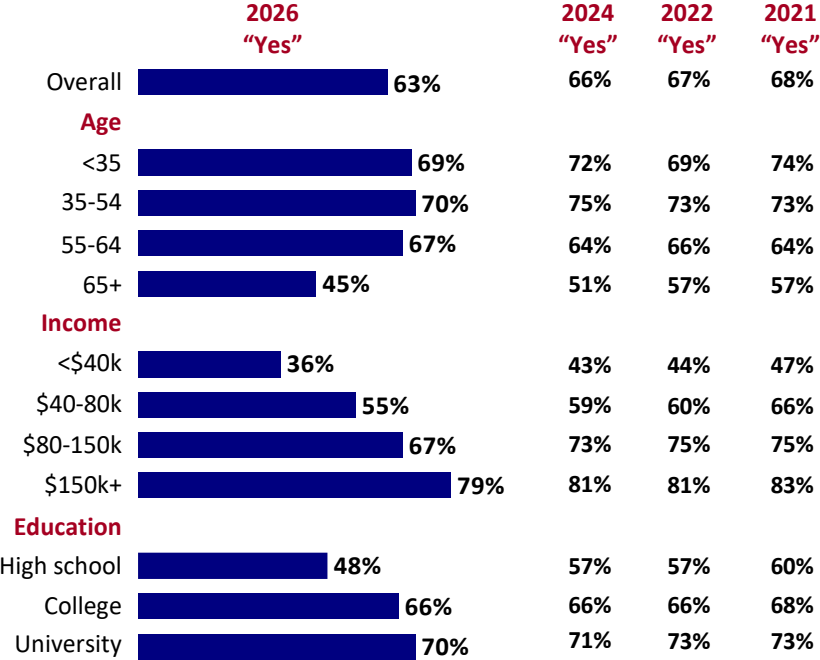
DETAILED FINDINGS

Outlined below are detailed findings from this study, organized by topic area.

A. INTENTION TO PURCHASE/LEASE A VEHICLE

Respondents were first asked if they plan to purchase or lease a new or used vehicle in the next 10 years. Results reveal that more than six in ten Canadians (63 per cent) say they intend to purchase a vehicle within that timeframe. Another 25 per cent do not intend to purchase a vehicle within this timeframe, and 12 per cent are unsure. Tracking suggests the proportion of Canadians who intend to purchase or lease a vehicle has declined five points since 2021.

Chart 1: Intention to purchase/lease a vehicle



QA. Do you plan to purchase or lease a new or used personal vehicle for yourself or others in the next 10 years?

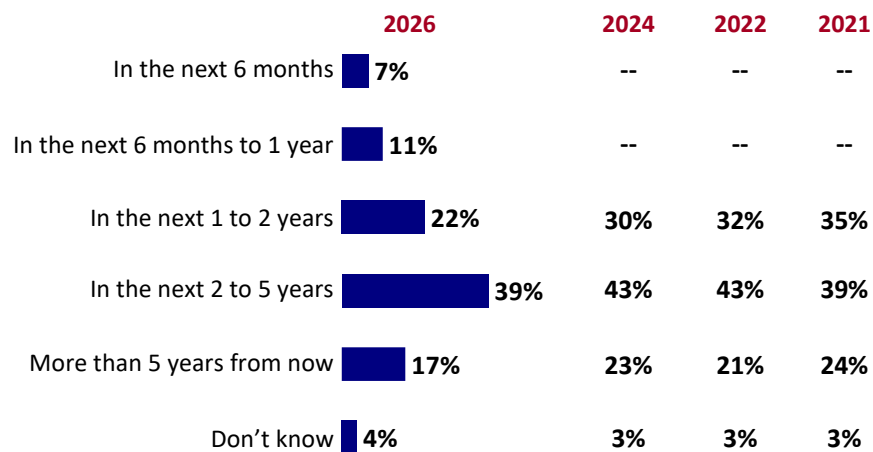
Base: Canadians; n=3,035

- Those 65 years of age and older are least likely to believe they will purchase or lease a new vehicle (45 per cent, down 12 percentage points since 2022).
- The likelihood of purchasing or leasing a vehicle rises progressively with both income (from 36 per cent among those earning less than \$40,000 in household income to 79 per cent among those earning \$150,000 or more) and education (from 48 per cent among those with a high school education to 70 per cent among university graduates).
- Men (68 per cent) are more likely than women (59 per cent) to say they will purchase or lease a vehicle.

Timeframe for purchasing/leasing a vehicle

Those intending to purchase or lease a vehicle in the next 10 years were asked a number of follow-up questions. When asked about the timeframe, four in ten of these respondents (40 per cent) indicated within the next two years, including seven per cent in the next six months, 11 per cent in the next six months to a year, and 22 per cent in the next one to two years. Four in ten (39 per cent) say they plan to purchase a vehicle in the next two to five years (30 per cent), while one in six (17 per cent) intend to wait at least five years. Tracking reveals an increase among those who plan to purchase/lease a vehicle in the next two years (from 30 per cent in 2024 to 40 per cent in 2026).

Chart 2: Timeframe for purchasing/leasing a vehicle



Q1. [IF PLANS TO PURCHASE VEHICLE] In what timeframe do you plan to purchase or lease a new or used personal vehicle for yourself or others?

BASE: If plans to purchase vehicle; n=1,925

- Residents of Alberta (36 per cent) and those 55-64 years of age (35 per cent) are more likely to say they will purchase/lease a vehicle within the next 2 years.
- Residents of Ontario (46 per cent) are more likely to say they will purchase/lease a vehicle within the next 2 to 5 years.

Size/Type of vehicle to be purchased

With regard to the type of vehicle they are considering, small sport utility vehicles continue to be selected most often (36 per cent), followed closely by midsize SUVs (34 per cent), and midsize vehicles (30 per cent). These results are largely consistent with those found in 2024.

Table 2: Size/type of vehicle to be purchased

<i>Q2. [IF PLAN TO PURCHASE VEHICLE] What size or type of personal vehicle will you be considering for lease or purchase? [SELECT ALL THAT APPLY] Results 2% or more only shown.</i>	2021	2022	2024	2026
Small sport utility (SUV)/crossover	34%	32%	35%	36%
Midsize sport utility/crossover	30%	27%	32%	34%
Midsize car	31%	29%	31%	30%
Small car	22%	22%	22%	20%
Pick-up truck	16%	15%	17%	15%
Large sport utility/crossover	9%	8%	9%	10%
Large car	7%	6%	7%	7%
Van/Minivan	3%	3%	3%	7%
Don't know	2%	2%	2%	2%

- The likelihood of considering a pick-up truck is higher among residents of Alberta (25 per cent, compared to 15 per cent nationally).
- Those under 35 years of age are more likely to consider a small (30 per cent) or midsize (42 per cent) car.
- Men are more likely to consider a pick-up truck (22 per cent, compared to nine per cent among women).
- A small car is more likely among those earning less than \$40,000 in household income (40 per cent) than it is among others.

Intended vehicle to be purchased

Results highlight a split between those who intend to buy a used vehicle (38 per cent) and those who intend to buy a new vehicle (36 per cent), while a fairly large proportion are unsure (26 per cent). Tracking reveals a four-point decline in the proportion of Canadians who intend to purchase a new vehicle (and a corresponding five-point rise in the proportion who plan to buy a used vehicle). This finding is consistent with Statistics Canada data indicating a slight decrease in new passenger car sales in December 2025 compared with December 2024.²

Chart 3: Intended vehicle to be purchased

	2026	2024	2022	2021
Previously owned	38%	33%	28%	30%
New	36%	40%	45%	45%
Don't know/not sure	26%	28%	27%	25%

Q3. [IF PLAN TO PURCHASE VEHICLE] Do you plan to purchase a new or previously owned vehicle?

BASE: If plans to purchase vehicle; n=1,925

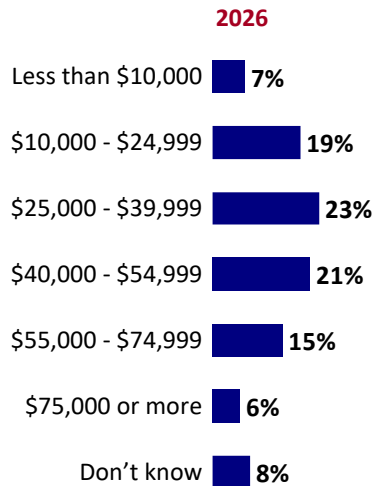
- The likelihood of considering purchasing a new vehicle rises progressively with age (from 25 per cent among those under 35 to 48 per cent among those 65 and over) and household income (from 18 per cent among those with a household income of less than \$40,000 to 44 per cent among those with a household income of \$150,000 or greater).
- Residents of Quebec are more likely to say they will purchase a new vehicle (44 per cent).
- Conversely, residents of BC are most likely to say they will purchase a previously owned vehicle (48 per cent, compared to 36 per cent nationally).

² Statistics Canada. Table 20-10-0085-01: New motor vehicle sales, monthly.

Market value of vehicle to be purchased

As was found in previous years, there is a range in expectation about the price consumers plan to pay, from one in five (19 per cent) indicating a \$10,000 - \$24,999 range, 23% indicating \$25,000 - \$39,999 and 21% believing they will pay \$40,000 - \$54,000.

Chart 4: Market value of vehicle to be purchased



Q4. [IF PLANS TO PURCHASE VEHICLE] What will likely be the total market value of the vehicle you plan to purchase or lease?

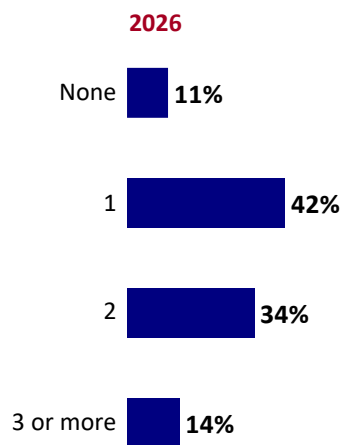
BASE: If plans to purchase vehicle; n=1,925

- Not surprisingly, the likely market value of the vehicle to be purchased rises progressively with household income. For example, 63 per cent of those earning less than \$40,000 in household income say they plan to purchase a vehicle with a market value under \$25,000, compared to 16 per cent among those earning \$150,000 or more.
- Those under 35 are more likely to say they plan to purchase a vehicle with a market value of less than \$25,000 (39 per cent, compared to 15 per cent among those aged 65 and over).
- Respondents who say they plan to purchase a previously owned vehicle are also more likely to spend less than \$25,000 (58 per cent, compared to one per cent among those who say they plan to purchase a new vehicle).

Number of personal vehicles owned per household

Canadians were asked how many vehicles they currently have in their household. The plurality (42 per cent) indicates they have one car, while a sizeable proportion (34 per cent) say they have two vehicles. Fourteen per cent of Canadians say they do not own a vehicle, and 11 per cent indicate they have three or more vehicles in their household. These results are consistent with those found in previous years.

Chart 5: Number of personal vehicles owned



Q5. How many personal vehicles do you currently have in your household?

BASE: Canadians; n=3,035

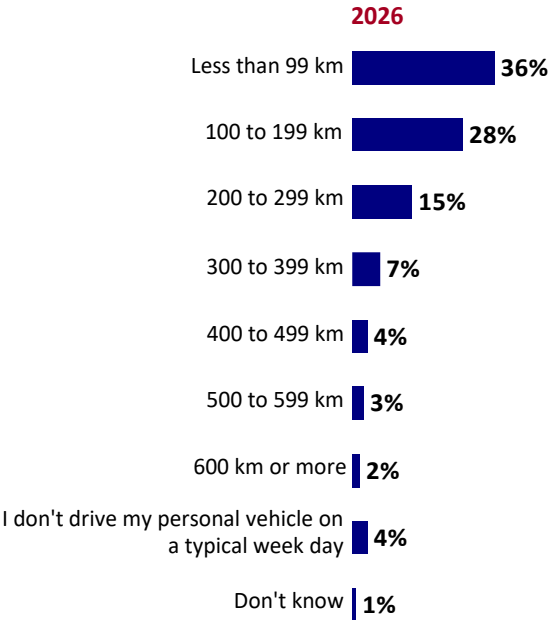
- Residents of Quebec are more likely to have either one personal vehicle or no vehicle at all in their household (64 per cent, compared to 53 per cent overall), and residents of Alberta and Saskatchewan/Manitoba are more likely to have two or more (61 per cent and 58 per cent, respectively, compared to 48 per cent overall).
- The number of vehicles in a household rises progressively with income. For example, 13 per cent of those earning less than \$40,000 in household income say they have two or more vehicles, compared to 78 per cent among those earning \$150,000 or more.

B. VEHICLE USAGE

Kilometres driven in typical week

Those who own at least one vehicle were asked about their vehicle usage. The largest proportion (36 per cent; up four per cent from 2024) drive their vehicle fewer than 99 kilometres during a typical week, although a significant proportion (28 per cent) drive between 100 and 199 kilometres per week.

Chart 6: Kilometres driven in typical week



Q6. [IF OWNS VEHICLE] How many kilometres do you drive your personal vehicle(s) in a typical week?

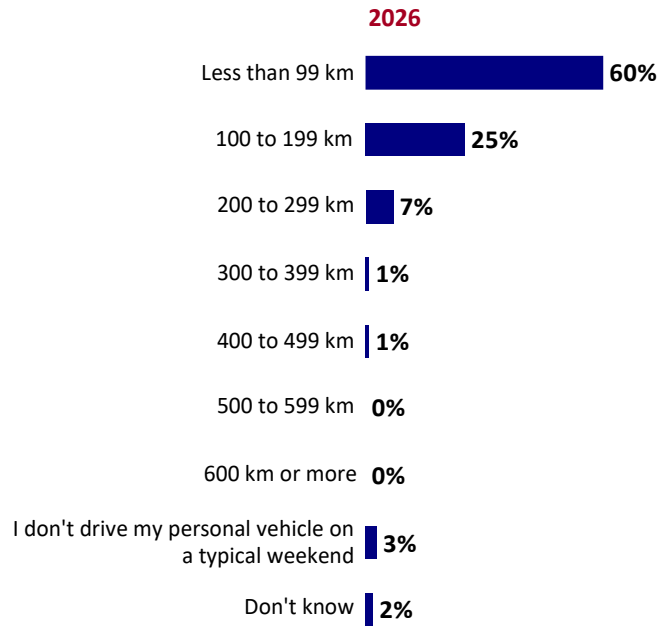
BASE: If owns vehicle; n=2,741

- Women (43 per cent) and those earning less than \$40,000 in household income (48 per cent) are more likely to say they drive less than 99 kilometres per week.

Kilometres driven on typical weekend

As in 2024, fewer than 99 kilometres is the most typical weekend mileage (60 per cent), with another one in four (25 per cent) saying they drive between 100 and 199 kilometres on weekends.

Chart 7: Kilometres driven on typical weekend



Q7. [IF OWNS VEHICLE] How many kilometres do you drive your personal vehicle(s) on a typical weekend?

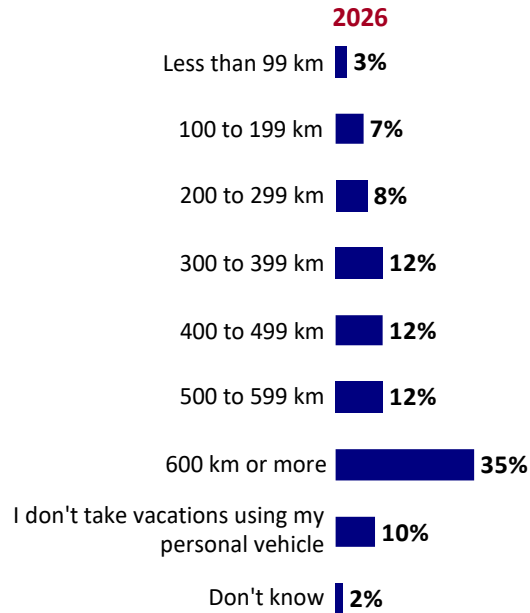
BASE: If owns vehicle; n=2,741

- The likelihood of driving less than 99 kilometres on a typical weekend rises progressively with age (from 55 per cent among those under 35 to 67 per cent among those aged 65 and over).
- Women are more likely to say they drive less than 99 kilometres on a typical weekend (65 per cent, compared to 55 per cent of men).

Kilometres driven on vacation

By comparison, daily mileage driven while on vacation is significant, with the largest proportion of drivers (35 per cent) saying they drive 600 kilometres or more in a single day, and another 24% registering 400 to 599 kilometres daily.

Chart 8: Kilometres driven on vacation



Q8. [IF OWNS VEHICLE] Thinking about the last time you took a vacation using your personal vehicle, what is the longest distance you drove in a single day?

BASE: If owns vehicle; n=2,741

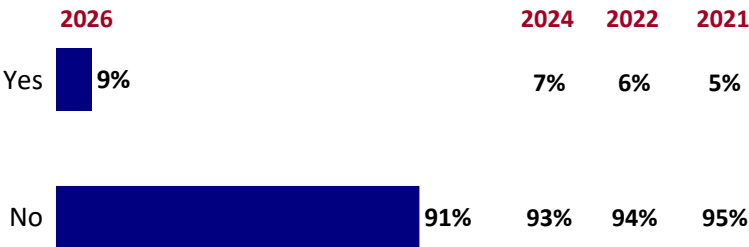
- Residents of Alberta (48 per cent) and Saskatchewan/Manitoba (47 per cent), men (41 per cent), and those 35-64 years of age (41 per cent) are more likely to say they drive 600 kilometres or more per day while on vacation.
- The likelihood of driving 600 kilometres or more daily rises with household income (from 26 per cent among those earning less than \$40,000 to 43 per cent among those earning \$150,000 or more). Those earning less than \$40,000 are more likely to say they do not use their vehicle on vacation (23 per cent).

C. OWNERSHIP AND INTENTION TO PURCHASE/LEASE AN ELECTRIC VEHICLE

Zero-emission vehicles owned/leased

According to 2026 results, nine per cent of Canadian vehicle owners now own or lease a zero-emission vehicle, nearly doubling from five per cent in the past five years.

Chart 9: Zero-emission vehicles owned/leased



Q9. [IF OWNS VEHICLE] Do you currently own or lease a zero-emission vehicle (a vehicle that runs on electricity)?

BASE: If own vehicle; n=2,741

- Residents of Quebec (18 per cent) and those with a household income of \$150,000 or more (15 per cent) are somewhat more likely to say they own a ZEV.

Consideration of purchasing/leasing a zero-emission vehicle

Among non-zero-emission vehicle owners, one in three (34 per cent) said they have considered purchasing a ZEV, which is consistent with the 2024 survey findings, but down significantly from 51 per cent in 2021 and 2022.³

Chart 10: Intention to purchase/lease a zero-emission vehicle (i)

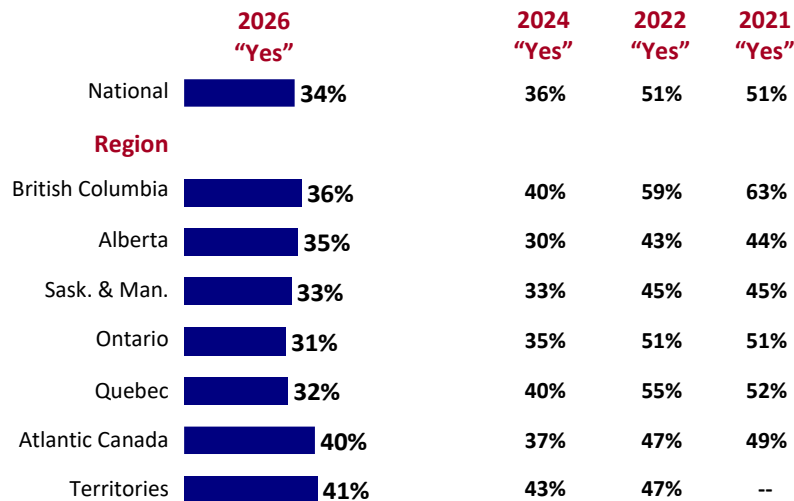
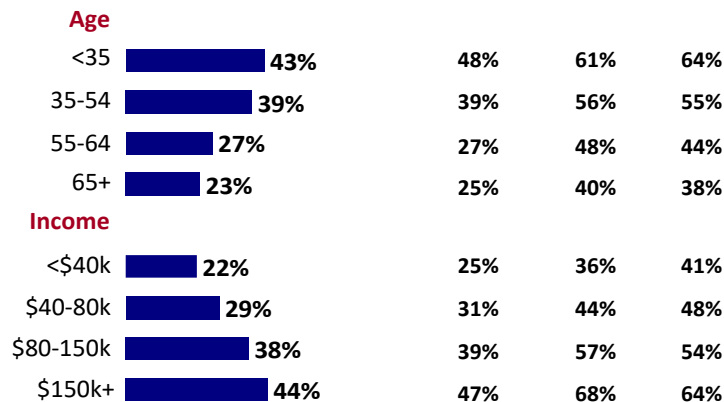


Chart 11: Intention to purchase/lease a zero-emission vehicle (ii)



Q19. [IF NOT OWN ELECTRIC VEHICLE] Have you considered purchasing or leasing a zero-emission vehicle for your household?

BASE: If not own electric vehicle; n=2,774

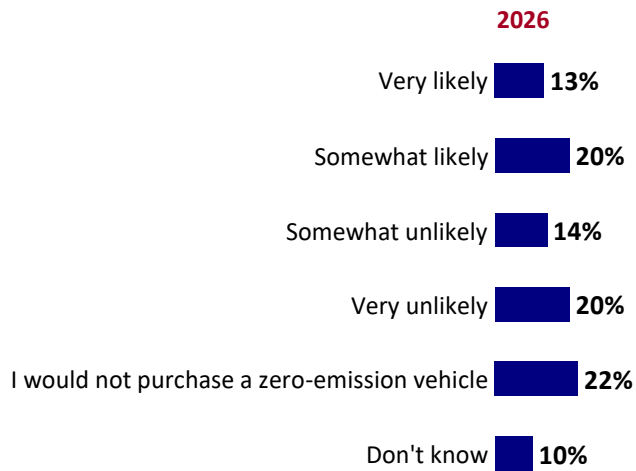
³ As previously noted, survey results from 2026 and 2024 may have been affected by a number of factors, such as the timing of the survey, inflation, and ZEV-related policy announcements in 2026 and 2024.

- The likelihood of considering the purchase/lease of a zero-emission vehicle rises progressively with both income (from 22 per cent among those earning less than \$40,000 in household income, to 44 per cent of those earning \$150,000 or more), and education (from 24 per cent among those with a high school diploma, to 45 per cent of university graduates).
- Conversely, the incidence of those who have considered purchasing/leasing a zero-emission vehicle declines with age (43 per cent of those under 35 years of age, compared to 23 per cent of those ages 65 and older).
- Among those who plan to purchase a new vehicle, 41% have considered purchasing/leasing a zero-emission vehicle for their household.
- Among those who do not own but have driven a ZEV, 52% said they would be willing to consider purchasing or leasing one compared with 45% among those who have ridden in one and only 20% of those who have never been in one.

Likelihood of purchasing ZEV as next vehicle

All respondents were asked how likely it is that they will purchase a ZEV as their next vehicle. While one in three believe it is very or somewhat likely (33 per cent), more than half believe it is very or somewhat unlikely (34 per cent), or that they will not purchase a ZEV (22 per cent). Ten per cent are unsure. These results are consistent with those found in 2024.

Chart 12: Likelihood of purchasing ZEV as next vehicle



Q20. How likely or unlikely are you to purchase a zero-emission vehicle as your next vehicle?

BASE: Canadians; n=3,035

- Those with a university education (43 per cent), those earning \$150,000 or more in household income (43 per cent), and Quebec residents (41 per cent) are most likely to indicate they are very or somewhat likely to purchase a ZEV as their next vehicle.
- Naturally, those willing to pay more for a zero-emission vehicle than an equivalent conventional one are far more likely to say they are very or somewhat likely to purchase a ZEV (77 per cent).

Information needed to consider purchase of ZEV

Non-ZEV owners were asked about the type of information that would be of greatest interest to them if they were considering purchasing or leasing a ZEV. Driving range was noted most often (51 per cent), followed by purchase price (46 per cent), driving range in cold weather (42 per cent), battery life expectancy (45 per cent), and winter performance (37 per cent). Results are in line with 2024.

Table 3: Information needed to consider purchase of ZEV

<i>Q18. If you were considering purchasing or leasing a zero-emission vehicle, which information would interest you the most? [Choose up to 5]</i>	2024	2026
Driving range – how far a vehicle can go on a fully charged battery	55%	51%
Purchase price	46%	46%
Driving range in cold weather compared to gas vehicles	34%	42%
Battery life expectancy	45%	41%
Winter performance	38%	37%
Time required to charge the battery	27%	29%
Reliability	26%	27%
Vehicle maintenance costs compared to an equivalent gas car	26%	26%
Subsidies for new/used vehicle purchase	21%	16%
Costs to charge a zero-emission vehicle	17%	14%
Cost of insurance	13%	14%
Warranty	13%	12%
Vehicle safety	11%	12%
How to charge a zero-emission vehicle at home	--	12%
Availability of all-wheel drive	10%	12%
The carbon footprint over a vehicle's lifetime	13%	11%
Environmental impact compared to an equivalent gas car	11%	10%
Resale value	6%	8%
How to charge a zero-emission vehicle	15%	5%
Towing capacity	5%	5%
Availability of makes and models in your area	6%	4%
Different levels, or speeds, of vehicle charging equipment	--	4%
Don't know	7%	8%

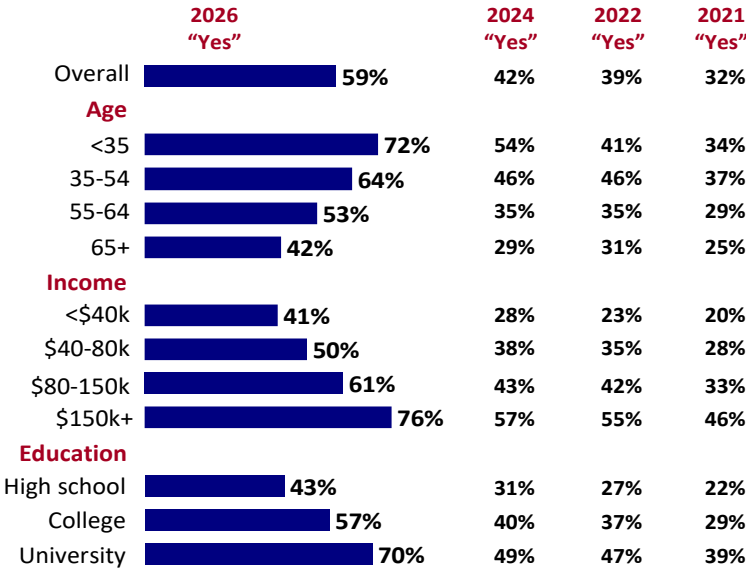
- Residents of Alberta and Saskatchewan/Manitoba are most likely to be interested in information about driving range in cold weather (55 per cent and 51 per cent, respectively) and winter performance (48 per cent and 54 per cent, respectively).
- The proportion interested in information about driving range rises progressively with both household income (from 42 per cent among those earning \$40,000 or less to 58 per cent among those earning \$150,000 or more) and education (from 45 per cent among those with a high school education to 57 per cent among those with a university education).

D. EXPERIENCE WITH ZERO-EMISSION VEHICLES

Experience with zero-emission vehicles

Among those who currently do not own or lease one, six in ten (59 per cent) have driven or ridden in a zero-emission vehicle, which is a significant increase from 42 per cent in 2024.

Chart 13: Experience with zero-emission vehicles



Q11. Have you ever driven or ridden in a zero-emission vehicle?

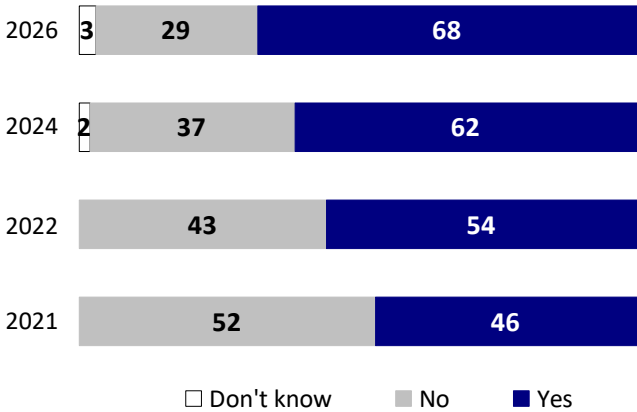
Note: Results do not include DK/NR.

BASE: Canadians; n=2,774

- Residents of BC (71 per cent) and men (64 per cent) are particularly likely to say they have driven/ridden in a zero-emission vehicle.
- The incidence of having driven/ridden in a zero-emission vehicle rises with both income (from 41 per cent among those earning less than \$40,000 in household income to 76 per cent of those earning \$150,000 or more) and education (from 43 per cent among those with a high school diploma to 70 per cent of university graduates), while it declines with age (from 72 per cent among those under 35 to 42 per cent among those aged 65 and over).

The proportion of respondents knowing an owner of a ZEV has increased steadily over time. Two in three (68 per cent) now know someone, which is an increase of six percentage points since 2024, 14 percentage points since 2022, and 22 percentage points since 2021.

Chart 14: Personal connection to zero-emission vehicle owners



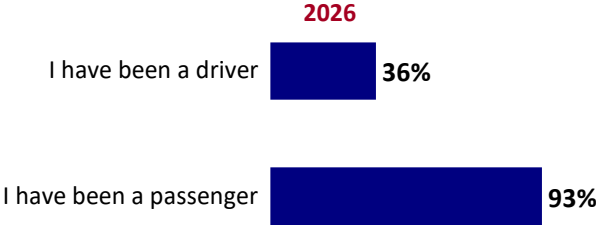
Q16. Do you know an owner of a zero-emission vehicle? For example, a friend, family member, neighbour or colleague

Base: Canadians; n=3,035

- Residents of Quebec (80 per cent), those between the ages of 35 and 54 (74 per cent), those with an annual household income of \$150,000 or more (81 per cent), individuals with a university education (71 per cent), owners of a new vehicle (79 per cent), those who willing to pay more for a ZEV, and those who have driven a ZEV (88 per cent) are more likely to know an owner of a ZEV.
- Conversely, residents of Alberta (42 per cent), those 65 years of age and older (35 per cent), individuals with an annual household income below \$40,000 (51 per cent), those with a high school education (42 per cent), people who are unwilling to purchase a ZEV (39 per cent), and those who have never ridden in a ZEV (51 per cent) are less likely to know an owner of a ZEV.

Respondents who indicated they have been in a ZEV were asked whether they have been a driver, a passenger, or both in a ZEV. A large majority (93 per cent) indicated that they have been a passenger, while more than a third (36 per cent) said they have been a driver.

Chart 15: Experience with zero-emission vehicles (i)



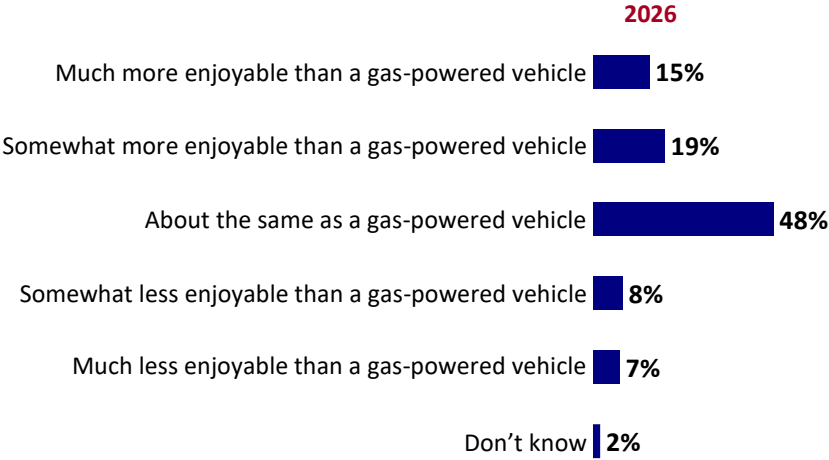
Q12. [IF HAVE BEEN IN A ZEV] Have you been a driver, a passenger or both in a zero-emission vehicle (ZEV), often commonly referred to as an electric vehicle, includes battery-electric, plug-in hybrid electric and hydrogen fuel cell? [Select all that apply.]

BASE: If have been in a ZEV; n=1,598

- Residents of the Territories (52 per cent), men (46 per cent), those with an annual household income of \$150,000 or above (43 per cent), owners of a new vehicle (46 per cent), and those who are willing to pay more for a ZEV (42 per cent) are more likely to have been a driver.

Comparing their ZEV experience with a gas-powered vehicle, one in three (34 per cent) said it was more or somewhat more enjoyable. This is compared with 15 per cent saying it was less enjoyable. About half (48 per cent) said it was about the same.

Chart 16: Experience with zero-emission vehicles (ii)



Q13. [IF OWN OR HAVE DRIVEN/RIDDEN IN A ZEV] How did your experience in a zero-emission vehicle compare to your experience in a gas-powered vehicle?

BASE: If own or have driven/ridden in a ZEV; n=1,859

- Residents of Quebec (42 per cent), those 65 years of age or older (43 per cent), and those who are willing to pay more for a ZEV (67 per cent) are more likely to say their experience with a ZEV was more enjoyable than in a gas-powered vehicle.
- Residents of the Territories (66 per cent), those between the ages of 55 and 64 (53 per cent), individuals with a high school education or less (54 per cent), those who are willing to pay the same for a ZEV or a conventional vehicle (58 per cent), and those who have been a passenger in a ZEV (55 per cent) are more likely to say their experience was the same.
- Respondents with a college education (20 per cent) and those who are unwilling to purchase a ZEV (49 per cent) are more likely to say their experience with a ZEV was less enjoyable.

When asked to describe their experience, a third of respondents (29 per cent) said it was quieter. Good acceleration time, speed, or torque (11 per cent); and a smooth or comfortable ride (9 per cent) were also noted by one in ten.

Table 4: Zero-emission vehicle experience

<i>Q13B. In your own words, explain in what way your zero-emission vehicle experience was more enjoyable/the same as/less enjoyable than a gas vehicle? Results 2% or more only shown.</i>	2026 (More enjoyable)
Quieter	29%
Good acceleration time/speed/torque	11%
Smooth/comfortable ride	9%
More fuel efficient, minimal operating/maintenance costs	7%
Better for the environment/eco-friendly, feels good to do my part for reducing pollution	6%
Charging concerns/issues	6%
Innovative technology, modern tech available within EV vehicles, tech amenities	5%
Good handling/responsive handling to speed/breaking	4%
Charging positives	3%
Prefer driving gas/ice vehicles	3%
Range/mileage issues on a charge, limited range/distance	3%
Canadian winters/weather change concerns	2%
Quality/luxury vehicles, well made/modern/sleek	2%
No fumes/smells	2%
Other general negatives	2%
Drive/ride is not smooth, uncomfortable	2%
Too much technology controls/features	2%
They are the same, did not notice any difference, did notice I was in an EV, got me from point a to point b	26%
Other	5%
Prefer not to answer	12%

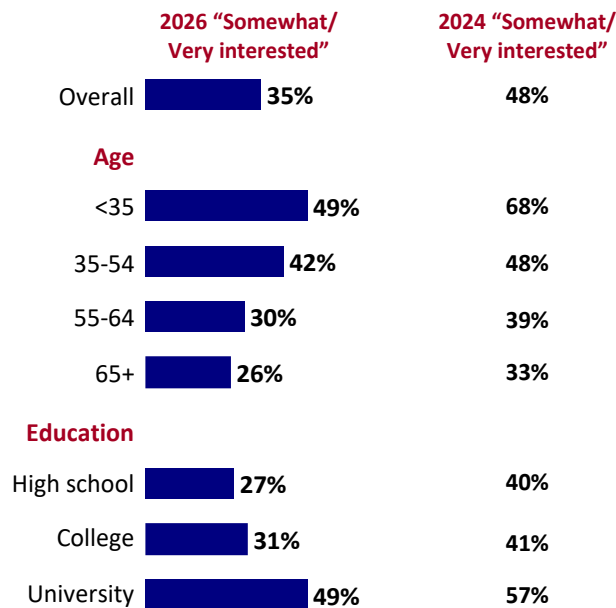
- Residents of Quebec (35 per cent), individuals 65 years of age or older (42 per cent), those with an annual household income below \$40,000, as well as those with an income between \$40,000 and \$80,000 (35 per cent, respectively), and those who are willing to pay more for a ZEV (42 per cent) are more likely to say their experience with a ZEV was quieter.

- Residents of the Territories (29 per cent), men (16 per cent), owners of a new vehicle (17 per cent), and those who are willing to pay more for a ZEV (21 per cent) are more likely to comment on a ZEV’s acceleration time, speed, or torque.

Interest in test-driving a zero-emission vehicle

Respondents who have not ridden in a ZEV were also asked about their interest in taking a zero-emission vehicle for a test drive. More than a third (35 per cent) said they would be somewhat or very interested, down from 40 per cent in 2024.

Chart 17: Interest in test driving a zero-emission vehicle



Q14. [IF HAVE NOT RIDDEN IN A ZEV] IF HAVE NOT RIDDEN IN A ZEV] How interested, if at all, would you be in taking a zero-emission vehicle for a test drive?

BASE: If have not ridden in a ZEV; n=1,115

- Those under 35 years of age are more interested in taking a zero-emission vehicle for a test drive (49 per cent compared to 35 per cent on average).
- Interest in taking a zero-emission vehicle for a test drive rises progressively with education (from 27 per cent among those with a high school diploma to 49 per cent of university graduates).

Reasons for lack of interest in taking ZEV test drive

Among those not interested in taking a ZEV for a test drive, the most common reason was their lack of intention to buy a ZEV (80 per cent, up significantly from 68 per cent in 2024), followed distantly by a lack of suitable ZEV models for their lifestyle (13 per cent, virtually unchanged from 15 per cent in 2024).

Table 5: Reasons for lack of interest in taking ZEV test drive

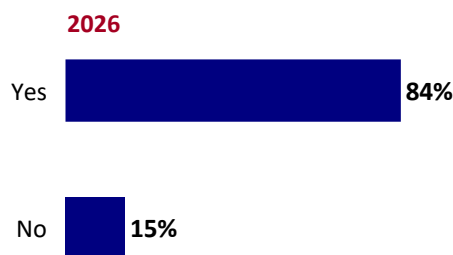
<i>Q15. Why would you not be interested in taking a zero-emission vehicle for a test drive? Results 2% or more only shown.</i>	2024	2026
I am not planning on buying a ZEV	68%	80%
No models that I prefer or are suitable for my lifestyle are available for test driving	15%	13%
Do not drive, do not have a license	--	5%
Test drives are run by biased people	2%	4%
Are environmentally damaging	3%	4%
No dealerships or test drives are near or convenient to me	4%	3%
Test drives are run by unknowledgeable people	--	3%
ZEVs/batteries do not work in Canada's cold weather/climate	4%	3%
Not planning on buying any car at this time	3%	3%
Too expensive to buy/own/repair	4%	2%
Prefer ices/hybrids	--	2%
Lack of necessary infrastructure to make them feasible	--	2%
Do not drive, do not have a license	6%	--
Lack of charging access	3%	--
Unreliable technology, not advanced enough, not ready to be broadly used	2%	--
Disagree with government supports for EVS	2%	--
Rural/remote living issues, do not suit rural living areas	2%	--
Distance/range issues with battery charge, not far/long enough	2%	--

- Residents of Saskatchewan and Manitoba (88 per cent) and owners of a previous-owned vehicle (93 per cent) are particularly likely to indicate they are not planning on buying a ZEV.

Zero-emission vehicle as primary vehicle

Among those who own or lease a zero-emission vehicle, the vast majority (84 per cent) say they use it as their primary vehicle, while one in seven (15 per cent) do not.

Chart 18: Zero-emission vehicle as primary vehicle



Q10. Is a zero-emission vehicle your primary vehicle?

Base: Canadians; n=261

Experience/actions taken with ZEVs (i)

Non-ZEV owners were asked what experiences they have had or actions they have taken with ZEVs. Primarily, non-ZEV owners talked to friends, family, or colleagues about ZEVs (40 per cent, close to 44 per cent in 2024). Nearly three in ten said they read a negative (29 per cent, down significantly from 42 per cent 2024) or positive (27 per cent, down from 34 per cent in 2024) news story about these vehicles. Thirty-six per cent reported having taken none of the listed actions with ZEVs, up from 29 per cent in 2024.

Table 6: Experience/actions taken with ZEVs

<i>Q21. In the past 12 months, which of the following, if any, experiences have you had, or actions have you taken, related to zero-emission vehicles?</i>	2024	2026
Talked to a friend, family member, or colleague about zero-emission vehicles	44%	40%
Read or heard a news story that gave negative information about zero-emission vehicles	42%	29%
Read or heard a news story that gave positive information about zero-emission vehicles	34%	27%
Done an internet search about zero-emission vehicles	28%	23%
Seen social media content (e.g. Facebook, Instagram) about zero-emission vehicles	25%	22%

<i>Q21. In the past 12 months, which of the following, if any, experiences have you had, or actions have you taken, related to zero-emission vehicles?</i>	2024	2026
Visited a car manufacturer's website to research zero-emission vehicles	17%	13%
Visited a car dealership to learn more about zero-emission vehicles	6%	6%
Visited a federal government website to research incentives for purchasing or leasing a zero-emission vehicle	8%	6%
Visited a provincial government website to research incentives for purchasing or leasing a zero-emission vehicle	6%	5%
Test driven a friend or colleague's zero-emission vehicle	6%	5%
Rented a zero-emission vehicle	3%	3%
Test driven a zero-emission vehicle at a dealership	3%	3%
Visited an Autoshow or convention and learned more about zero-emission vehicles	3%	2%
Test driven a zero-emission vehicle at a special event	1%	1%
None of the above	29%	36%
Don't know	1%	1%

- BC residents (47 per cent), those under 35 years of age (47 per cent), those earning \$150,000 or more in household income (46 per cent), and those with university education (48 per cent) are most likely to indicate they talked with a friend/family member/colleague about ZEVs.
- Alberta (40 per cent) and BC residents (34 per cent) and men (35 per cent) are most likely to indicate they heard a negative story about ZEVs.
- BC residents (33 per cent) and men (33 per cent) are most likely to indicate they heard a positive story about ZEVs.

Awareness of zero-emission vehicles makes and models

Respondents were asked, unprompted, to name any zero-emission vehicle makes and models they were aware of. As was found in previous years, Tesla is mentioned most often (55 per cent, the same proportion as in 2024). Over one in ten mentioned the Ford F150 truck (14 per cent, the same proportion as in 2024), Nissan Leaf (13 per cent, down slightly from 17 per cent in 2024), Toyota Prius (11%, compared to 12% in 2024), Hyundai Ioniq (11%, unchanged), or a general mention of Toyota (11%, 10% in 2024)). One in five (17 per cent, nearly the same of 18 per cent in 2024) could not name any ZEV.

Table 7: Awareness of zero-emission vehicle makes and models

<i>Q17. Please name any zero-emission vehicle (ZEV), makes and models (company and specific car, SUV or truck name) of which you are aware. [OPEN ENDED]</i> <i>Results 3% or more only shown</i>	2021	2022	2024	2026
Tesla (General mention)	51%	52%	55%	55%
Ford F150/ Truck	4%	8%	14%	14%
Nissan Leaf	21%	17%	17%	13%
Toyota Prius	14%	10%	12%	11%
Hyundai Ioniq	3%	8%	11%	11%
Toyota (General mention)	7%	7%	10%	11%
Chevrolet Volt	16%	16%	13%	8%
KIA (General mention)	3%	5%	6%	8%
Volkswagen (General mention)	--	4%	6%	8%
Ford Mustang Mach-E SUV	4%	7%	7%	8%
Hyundai (General mention)	4%	5%	7%	7%
Chevrolet (General mention)	3%	5%	4%	7%
Chevrolet Bolt	11%	12%	12%	7%
Ford (General mention)	6%	7%	8%	6%
Tesla 3	7%	6%	8%	6%
Volvo (General mention)	--	--	6%	6%
Honda (General mention)	3%	3%	5%	5%
Rivian (General and Specific)				5%
Hyundai Kona	5%	6%	6%	5%
Tesla X/Y	3%	3%	7%	4%
Tesla S	5%	4%	6%	3%

<i>Q17. Please name any zero-emission vehicle (ZEV), makes and models (company and specific car, SUV or truck name) of which you are aware. [OPEN ENDED] Results 3% or more only shown</i>	2021	2022	2024	2026
Toyota Rav4	--	--	4%	3%
BMW (General mention)	3%	3%	4%	3%
Other	--	--	--	18%
DK/NR	27%	25%	18%	17%

- Residents of Alberta (65 per cent), those aged 35 to 54 (60 per cent), and those earning \$150,000 or more in household income (62 per cent) are the most likely to name Tesla.
- Owners of a previously owned vehicle are more likely to identify Tesla (60 per cent).

E. VIEWS ON ZERO-EMISSION VEHICLE FEATURES

Attitudes towards zero-emission vehicles

Respondents were also asked a number of attitudinal questions about ZEVs. Results reveal mixed views on zero-emission vehicles, as well as a general lack of knowledge about these vehicles.

Consistent with results from previous iterations of this study, findings generally indicate that Canadians believe ZEVs are beneficial for the environment, but also feel they are expensive and difficult to charge. Canadians also have limited understanding about a range of issues associated with these vehicles, such as safety, vehicle charging, performance, maintenance costs, and resale value.

A clear majority of Canadians (73 per cent, down only slightly from 75 per cent in 2024) believe that zero-emission vehicles are too expensive, while only 38 per cent of Canadians agree that gas or diesel-powered vehicles are too expensive.

Canadians generally believe that ZEVs are better for the environment than other types of vehicles. Just over half (55 per cent, virtually unchanged from 54 per cent in 2024) agree that zero-emission vehicles contribute significantly to a reduction of greenhouse gas emissions and air pollutants compared to gas or diesel-powered vehicles, and just under half (48 per cent, identical to 2024) agree that zero-emission vehicles are less damaging to the environment than gas or diesel-powered vehicles.

Results also reveal concerns about charging ZEVs. More than half of Canadians (57 per cent, down from 62 per cent – up in 2024) agree that there are too few, if any, publicly available charging stations where they drive. In addition, more than half express concerns that zero-emission vehicles cannot travel far enough on a full charge (58 per cent, up from 56 per cent since 2024), Fewer than half agree that they can charge a zero-emission vehicle at their home (48 per cent, unchanged since 2024), and even fewer agree they can charge a ZEV at their workplace (19 per cent). In addition, half of Canadians worry that if too many people purchase zero-emission vehicles, it will put too much pressure on the electric grid (50 per cent). Less than half agree that charging a zero-emission vehicle at home will significantly increase their monthly electricity bill (43 per cent, down from 48 per cent since 2024).

There is also a significant proportion who feel that zero-emission vehicles perform poorly in cold weather (58 per cent, down one percentage point from 59 per cent in 2024).

Four in ten (38 per cent, down one per cent from 39 per cent since 2024) believe a zero-emission vehicle would save them money in the long run⁴, and one in three (33 per cent, unchanged since 2024) say they would only buy a zero-emission vehicle as a second vehicle for their household, while keeping a gas or diesel-powered vehicle as well.

One in four (24 per cent, unchanged since 2024) feel that the style or type of vehicle they prefer is not available as a zero-emission vehicle, but many are unsure. Nearly a quarter (24 per cent, up from 18 per cent since 2024) feel there is an affordable zero-emission vehicle available that meets their lifestyle needs, but again, many are unsure.

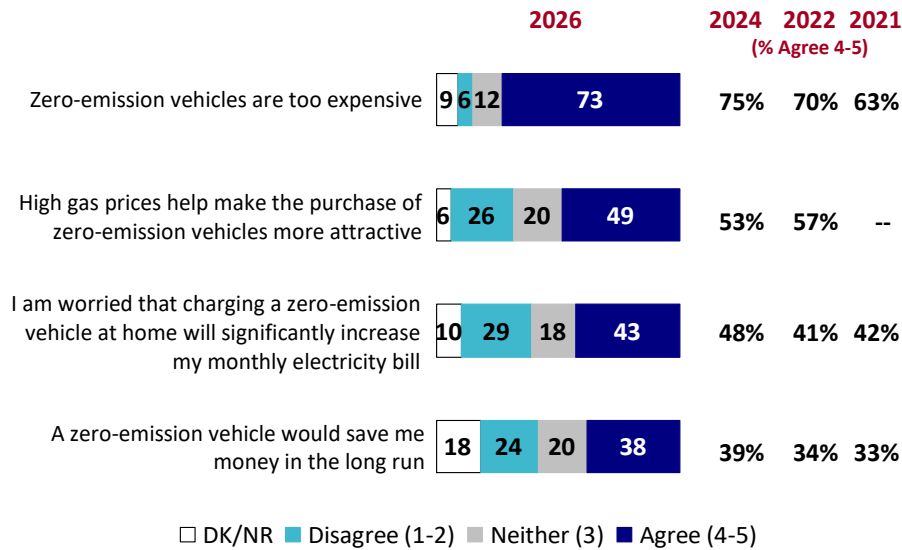
One quarter (25 per cent, unchanged since 2024) feel the repair and maintenance costs for a zero-emission vehicle are lower than for a gas or diesel-powered vehicle, and over four in ten (41 per cent, a notable increase from 21 per cent in 2024) believe zero-emission vehicles have a poor resale value.

Moreover, over four in ten Canadians could not provide a response when asked whether zero-emission vehicles have the same towing ability as conventional vehicles (41 per cent), or whether hydrogen fuel cell electric vehicles are more dangerous than other kinds of vehicles (46 per cent).

Finally, one in four (25 per cent, down two per cent from 27 per cent in 2024) agree that it is difficult to find credible sources of information about zero-emission vehicles, and one in five (22 per cent, 20 per cent since 2024) feel that gas or diesel-powered vehicles are safer than ZEVs, but again, many express uncertainty about these issues. (Charts are on following pages).

⁴ Please note that the question wording for ZEVs saving money in the long run was slightly changed in 2024 (the words “in the long run” were added to the question).

Chart 19: Attitudes related to costs (i)

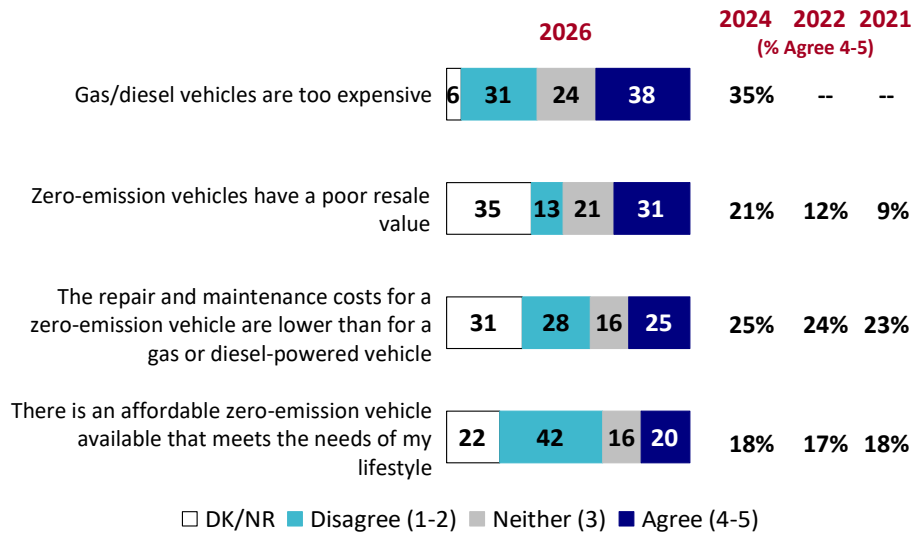


Q22. Please indicate [on a 5-point scale] whether you agree or disagree with each of the following statements about zero-emission vehicles.

BASE: Canadians; n=3,459

- Men (78 per cent) are more likely to agree that ZEVs are too expensive.
- Residents of BC (57 per cent), those under the age of 35 (61 per cent), respondents with an annual household income between \$80,000 and \$150,000 (55 per cent), and those with a university education (60 per cent) are more likely to agree that high gas prices make the purchase of a ZEV more attractive.
- Residents of the Territories (72 per cent), those with an annual household income below \$40,000 (51 per cent), and those with a high school education or less (50 per cent) are more likely to worry that charging a ZEV at home will significantly increase their monthly electricity bill.
- Residents of Quebec (46 per cent), those under the age of 35 (49 per cent), respondents with an annual household income between \$80,000 and \$150,000 (43 per cent), and those with a university education (47 per cent) are more inclined to agree that a ZEV would save them money in the long run.

Chart 20: Attitudes related to costs (ii)

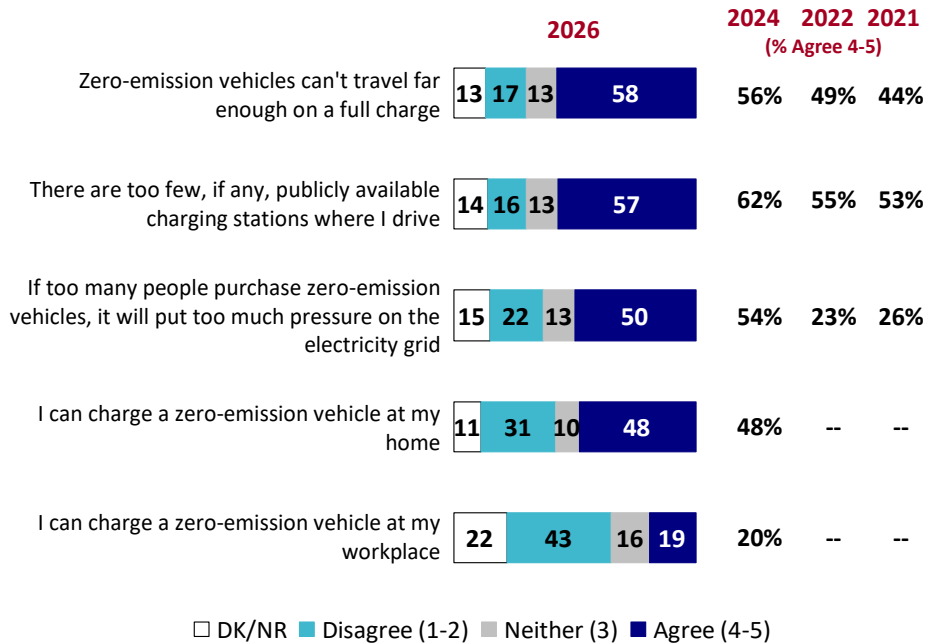


Q22. Please indicate [on a 5-point scale] whether you agree or disagree with each of the following statements about zero-emission vehicles.

BASE: Canadians; n=3,459

- Atlantic Canadians and residents of Alberta and Saskatchewan (44 per cent respectively) are more likely to agree that gas or diesel vehicles are too expensive.
- Residents of BC (37 per cent), men (40 per cent), those with an annual household income of \$150,000 or above (36 per cent), those who have previously owned a ZEV (36 per cent), those who are unwilling to buy a ZEV (50 per cent), and those who have driven a ZEV (39 per cent) are more likely to agree that a ZEV has a poor resale value.
- Residents of BC (34 per cent), men (34 per cent), those with an annual household income of \$150,000 or above (33 per cent), those with a university education (30 per cent), those who are willing to pay more for a ZEV (52 per cent), and those who have driven a ZEV (33 per cent) are more likely to agree that the repair and maintenance costs for a ZEV are lower than for a gas or diesel-powered vehicle.
- Residents of Quebec and the Territories (26 per cent respectively), those with an annual household income of \$150,000 or above (27 per cent), those with a university education (27 per cent), and those who are willing to pay more for a ZEV (49 per cent) are more likely to agree that there is an affordable zero-emission vehicle available that meets the needs of their lifestyle.

Chart 21: Attitudes related to driving range and infrastructure



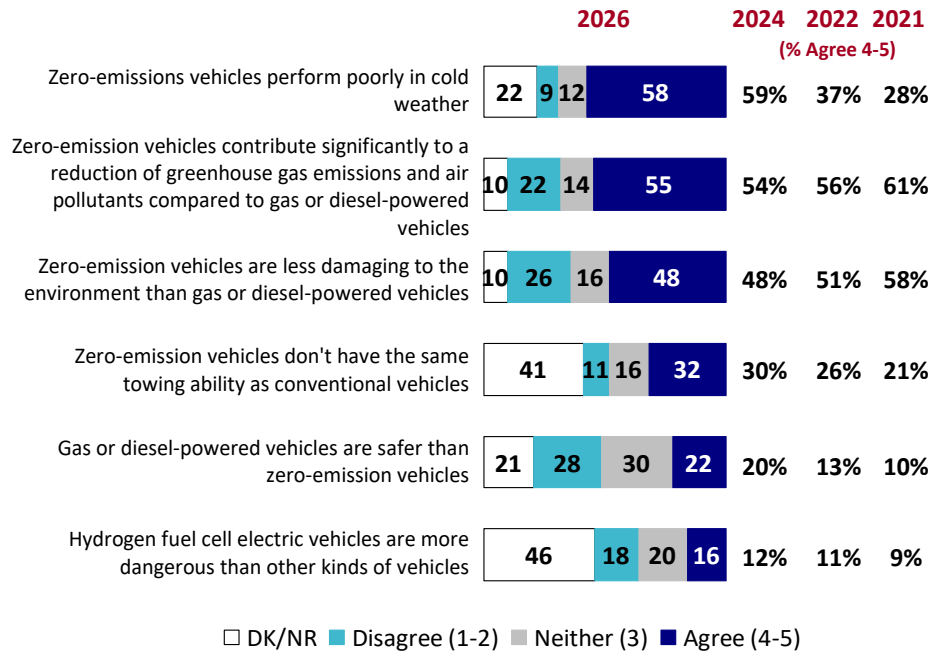
Q22. Please indicate [on a 5-point scale] whether you agree or disagree with each of the following statements about zero-emission vehicles.

BASE: Canadians; n=3,459

- Those who intend to purchase a new, not used, vehicle (65 per cent), those who are unwilling to buy a ZEV (77 per cent), and those who have driven a ZEV (64 per cent) are more likely to agree that ZEVs cannot travel far enough on a full charge.
- Residents of Atlantic Canada (71 per cent), those who intend to purchase a new vehicle (65 per cent), and those who are willing to pay less for a ZEV (65 per cent) are more likely to agree that there are too few, if any, publicly available charging stations where they drive.
- Residents of Alberta (60 per cent), men (56 per cent), those with a college education (55 per cent), those who intend to purchase a new, not used, vehicle (55 per cent), and those who are unwilling to purchase a ZEV (77 per cent) are more likely to agree that if too many people purchase zero-emission vehicles, it will put too much pressure on the electricity grid.
- Residents of Quebec (56 per cent), men (56 per cent), those with an annual household income of \$150,000 or above (63 per cent), those with a university education (53 per cent), those who intend to purchase a new, not used, vehicle (60 per cent), those who are willing to pay more for a ZEV (73 per cent), and those who have driven a ZEV (58 per cent) are more likely to agree that they can charge a zero-emission vehicle at their home.

- Residents of Quebec (27 per cent), those with an annual household income of \$150K or above (29 per cent), and those who are willing to pay more for a ZEV are more likely to agree that they can charge a zero-emission vehicle at their workplace.

Chart 22: Attitudes related to safety & performance



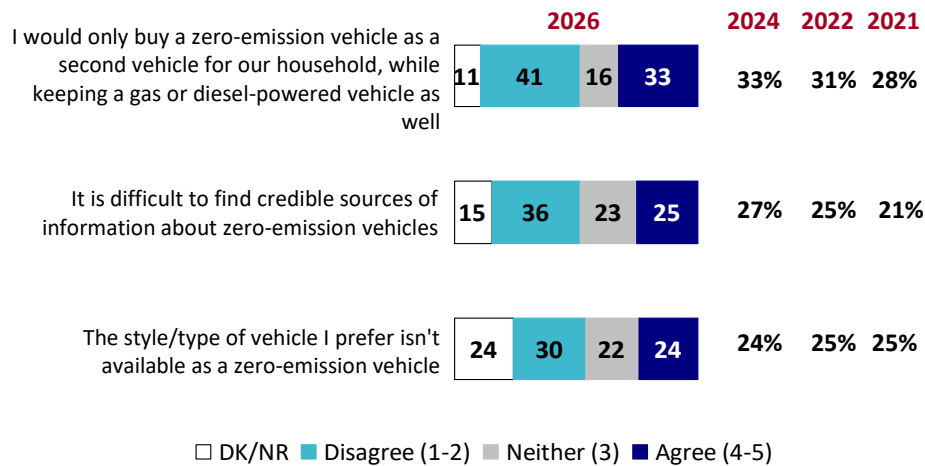
Q22. Please indicate [on a 5-point scale] whether you agree or disagree with each of the following statements about zero-emission vehicles.

BASE: Canadians; n=3,459

- Residents of Alberta (71 per cent) and Saskatchewan and Manitoba (64 per cent), along with men (65 per cent), those with an annual household income over \$150,000 (63 per cent), or who have a college education (62 per cent), are more likely to say ZEVs perform poorly in cold weather.
- Residents of Quebec (62 per cent), those 65 and over (60 per cent), those with a university education (64 per cent), and those who are willing to pay more for a ZEV (86 per cent) are more likely to agree that ZEVs contribute significantly to a reduction of greenhouse gas emissions and air pollutants compared to gas or diesel-powered vehicles.
- Those 65 and over (53 per cent), with a university education (57 per cent), and those who are willing to pay more for a ZEV (81 per cent) are more likely to agree that ZEVs are less damaging to the environment than gas or diesel-powered vehicles.

- Residents of BC (38 per cent), men (40 per cent), those with a college education (37 per cent), those who have owned a new vehicle (37 per cent), those who unwilling to purchase a ZEV (46 per cent), and those who have driven a ZEV are more likely to agree that ZEVs do not have the same towing ability as conventional vehicles.
- Residents of the Territories (45 per cent), those with a college education (28 per cent), those who are unwilling to purchase a ZEV (51 per cent), and those who have never been in a ZEV (27 per cent) are more likely to agree that gas or diesel-powered vehicles are safer than ZEVs.
- Those who are unwilling to purchase a ZEV (23 per cent) are more likely to agree that hydrogen fuel cell electric vehicles are more dangerous than other kinds of vehicles.

Chart 23: Other attitudes



Q22. Please indicate [on a 5 point scale] whether you agree or disagree with each of the following statements about zero-emission vehicles.

BASE: Canadians; n=3,459

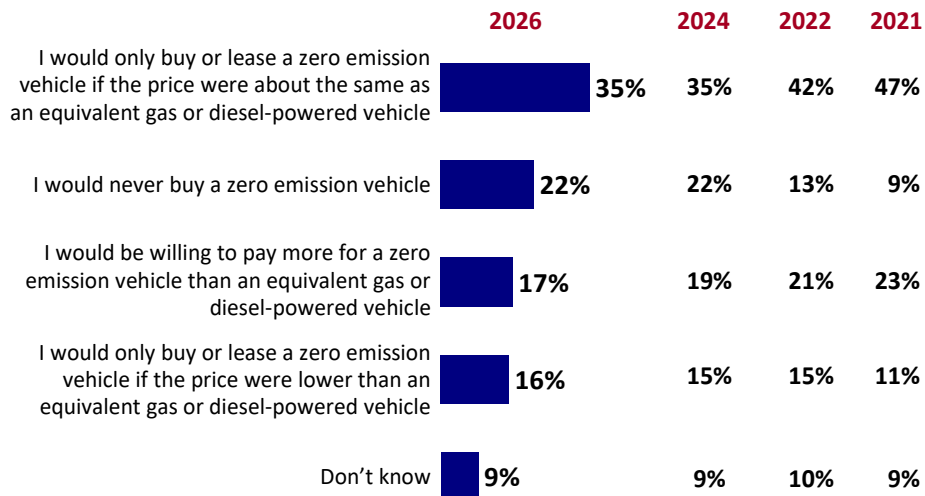
- Residents of Alberta (41 per cent), those with an annual household income of \$150,000 or above (41 per cent), those who have owned a new vehicle (40 per cent), those who are not willing to pay more for a ZEV (51 per cent), and those who have driven a ZEV (39 per cent) are more likely to agree that they would only buy a ZEV as a second vehicle for their household, while keeping a gas or diesel-powered vehicle as well.
- Residents of Saskatchewan and Manitoba (36 per cent) and those who are not willing to pay more for a ZEV are more likely to agree that it is difficult to find credible sources of information about zero-emission vehicles.

- Residents of Saskatchewan and Manitoba, as well as residents of BC (29 per cent each), those who are not willing to pay less for a ZEV (33 per cent), and those who have driven a ZEV (33 per cent) are more likely to agree that the style or type of vehicle they prefer is not available as a ZEV.

Attitudes about price parity to ICEVs in purchase of zero-emission vehicles

Respondents were also asked a range of statements about the purchase price of a ZEV. Most indicated that they would only buy a zero-emission vehicle if the price were about the same as an equivalent conventional vehicle (35 per cent, unchanged since 2024). About one in five (17 per cent, down from 19 per cent since 2024) would be willing to pay more for a zero-emission vehicle than an equivalent conventional vehicle. Sixteen per cent indicated they would only buy or lease a zero-emission vehicle if the price were lower than an equivalent conventional vehicle, and 22 per cent (unchanged since 2022) said they would never buy a zero-emission vehicle.

Chart 24: Importance of price parity in purchase of zero-emission vehicles



Q23. Which of the following statements is closest to your own point of view?

BASE: Canadians; n=3,035

- Those under 35 years of age (40 per cent), those with \$80,000-\$150,000 in household income (41 per cent), and those with a university education (25 per cent) are more likely to indicate they would only buy a zero-emission vehicle if the price were about the same as an equivalent conventional vehicle.
- Residents of the Territories (34 per cent), those aged 65 and over (27 per cent), those with a high school education (30 per cent), and who have never ridden in a ZEV (31 per cent) are more likely to say they would never buy a ZEV.
- Those with a household income of \$150,000 or more (24 per cent), and university graduates (25 per cent) are most likely to say they would be willing to pay more for a zero-emission vehicle than an equivalent conventional vehicle.
- Residents of Saskatchewan and Manitoba (21 per cent) are more likely to say they would only buy or lease a ZEV if the price were lower than an equivalent gas or diesel-powered vehicle.

Factors encouraging purchasing/Leasing a zero-emission vehicle

Canadians were also asked how much impact a range of factors would have on their likelihood of purchasing or leasing a zero-emission vehicle.

Equal or greater driving range than a gas or diesel vehicle (43 per cent, down from 48 per cent in 2024), proven winter weather performance (42 per cent, a decrease from 49 per cent), access to a charging station at home (41 per cent, down from 49 per cent), and a 10-year battery warranty (40 per cent, down from 49 per cent in 2024) were seen as factors that were much more likely to encourage Canadians to consider purchasing/leasing ZEVs.

Lower total costs to own and operate ZEVs (34 per cent, down from 47 per cent), rebates/incentives for purchasing or leasing a ZEV (35 per cent, down from 41 per cent), lower maintenance costs than a similar gas vehicle (34 per cent, compared to 39 per cent), and more charging stations along highways (33 per cent, down from 41 per cent) were also seen as effective in encouraging Canadians to consider ZEVs.

Table 8: Factors encouraging purchasing/leasing a zero-emission vehicle

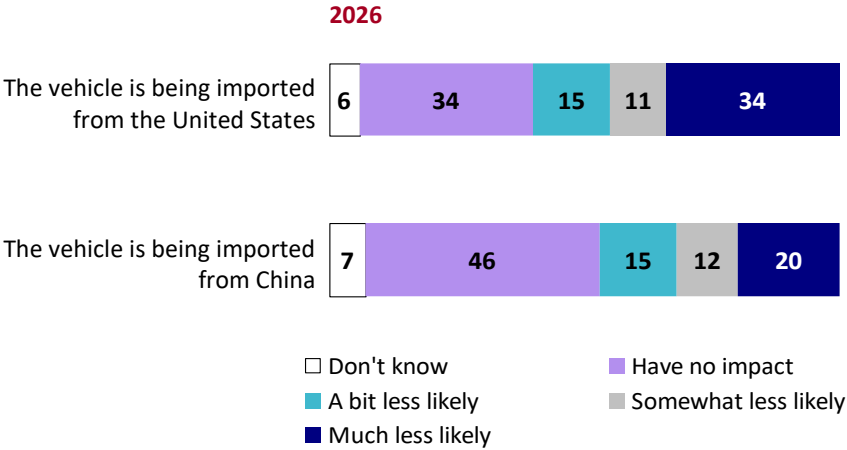
<i>Q24. How much of an impact, if any, would each of the factors below have on your likelihood of purchasing or leasing a zero-emission vehicle? Would it make you...?</i> <i>Note: Results do not include DK/NR.</i>	2021 “A great extent”	2022 “A great extent”	2024 “A great extent”	2026 “Much more likely to purchase”⁵
Equal or greater driving range than a gas or diesel vehicle	51%	45%	48%	43%
Proven winter-weather performance	45%	49%	49%	42%
Having access to a charging station at home	54%	49%	49%	41%
10-year battery warranty	51%	46%	49%	40%
Lower total cost of owning and operating the vehicle	--	--	47%	40%
Rebates/incentives for purchasing or leasing the vehicle	--	--	41%	35%
Lower maintenance costs than a similar gas vehicle	43%	39%	39%	34%
More charging stations along highways	46%	43%	41%	33%
Convenient locations of public charging stations	--	--	40%	33%
Lower fuel costs to operate a zero-emission vehicle	--	--	38%	32%
Rebates/incentives for purchasing or installing a charging station at home	--	--	39%	31%
More charging stations in public parking lots and shopping destinations	41%	38%	34%	29%
Lower total carbon footprint over its manufacturing, use and disposal compared to a gas vehicle	--	--	33%	29%
Similar monthly payments compared to gas vehicles	--	--	33%	23%
Selection of makes and models similar to that of gas vehicles	--	--	24%	22%
Convenient access to charging stations at my workplace	31%	29%	--	21%
Better towing capacity than a similar gas vehicle	15%	--	13%	13%
A short wait time for my vehicle to be delivered	--	--	19%	--

⁵ Note that the scale was changed from “Great extent” (would increase likelihood to purchase) in previous years to “Much more likely to purchase” in 2026.

- Residents of the Territories (51 per cent), under age 35 (49 per cent), with a university education (54 per cent), have owned a new vehicle (50 per cent), are willing to pay more for a ZEV (58 per cent), and those who have driven a ZEV (50 per cent) are more likely to say having equal or greater driving range than a gas or diesel vehicle would make them more likely to purchase a ZEV.
- Residents of Saskatchewan and Manitoba (49 per cent), under age 35 (50 per cent), with an annual household income between \$80,000 and \$150,000 as well as those earning \$150,000 or above (46 per cent each), those with a university education (51 per cent), those who own a new vehicle (46 per cent), those who are willing to pay the same for a ZEV or a conventional vehicle (56 per cent), and those who have been a passenger in a ZEV are more likely to say proven winter weather performance would make them more likely to purchase a ZEV.
- Those under age 35 (49 per cent), earning an annual household income of \$150,000 or above (47 per cent), with a university education (53 per cent), those who own a new vehicle (46 per cent), and those who are willing to pay more for a ZEV (64 per cent) are more likely to say having access to a charging station at home would make them more likely to purchase a ZEV.
- Residents of Atlantic Canada and Quebec (45 per cent each), those under age 35 (46 per cent), with a university education (48 per cent), and those who are willing to pay more for a ZEV (57 per cent) are more likely to say a 10-year battery warranty would make them more likely to purchase a ZEV.

One in three respondents (34 per cent) indicated that they would be much less likely to purchase a ZEV if the vehicle were being imported from the US, although the same proportion indicated this would have no impact on their decision. On the other hand, nearly half (46 per cent) said that a vehicle being imported from China would have no impact on their decision.

Chart 25: Factors influencing decision to purchase a ZEV



Q25a-b. How much of an impact, if any, would each of the factors below have on your likelihood of purchasing or leasing a zero-emission vehicle? Would it make you ...?

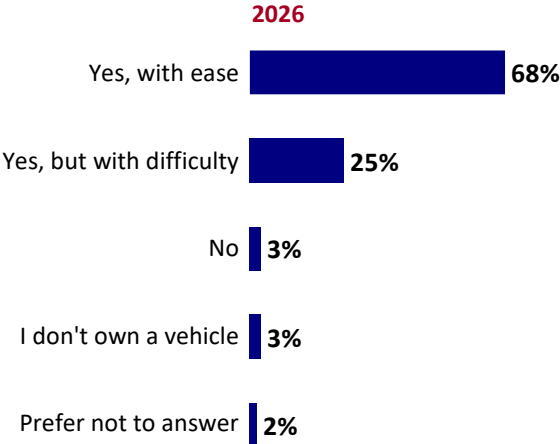
Note: Results do not include DK/NR.

BASE: Canadians; n=3,035

- Residents of Quebec (43 per cent), those 65 and over (43 per cent), and those who are willing to pay more for a ZEV (41 per cent) are less likely to purchase a ZEV if it is being imported from the US.
- Residents of BC (51 per cent), those under age 35 (56 per cent), those earning an annual household income below \$40,000 (51 per cent), and those who are unwilling to purchase a ZEV (53 per cent) are more likely to say that the vehicle being imported from China would have no impact on their decision to purchase a ZEV.

Respondents were also asked whether they were able to afford bills associated with vehicle ownership, including monthly payments, fuel or charging costs, maintenance, and insurance over the past three months. A majority of respondents (68 per cent) indicated that they were able to do so with ease, although one in four (25 per cent) said they could do so but with difficulty. Only a small proportion (3 per cent) either said they could not, or that they did not own a vehicle.

Chart 26: Vehicle ownership affordability



Q25c. Over the past three months, have you been able to afford bills associated with vehicle ownership, including monthly payments, fuel or charging costs, maintenance, and insurance?

Note: Results do not include DK/NR.

BASE: Canadians; n=2,741

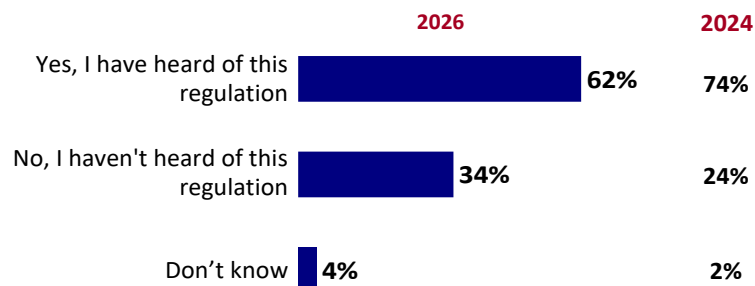
- Residents of Quebec (79 per cent), those 65 and over (81 per cent), with a university education (75 per cent), those who own a new vehicle (77 per cent), and who are willing to pay more for a ZEV (83 per cent) are more likely to say they would be able to afford bills associated with vehicle ownership with ease.
- Residents of Atlantic Canada (34 per cent), those between the ages of 35 and 54 (31 per cent), with household income under \$40,000 (46 per cent), and those who are not willing to pay more for a ZEV (38 per cent) are more likely to say they would be able to afford bills associated with vehicle ownership, but with difficulty.

F. AWARENESS AND SUPPORT FOR GOVERNMENT REBATES/MANDATES

Awareness of Canada's Electric Vehicle Availability Standard

Respondents were also asked if they had heard of Canada's Electric Vehicle Availability Standard, a federal regulation requiring that by 2035, 100 per cent of new light-duty vehicles for sale in Canada must be zero-emission vehicles. Six in ten Canadians (62 per cent) say they have heard of this regulation, a 12-point decline from 2024. One in three (34 per cent) say they have not, up from 24 per cent in 2024.

Chart 27: Awareness of Canada's Electric Vehicle Availability Standard



Q26. Canada's Electric Vehicle Availability Standard is a federal regulation requiring that a stated percent of all new light duty vehicles for sale in Canada, including cars, SUVs and pick-up trucks, must be zero-emission vehicles (ZEVs). The required sales targets will increase annually so that eventually all new vehicle sales will be ZEVs. Have you heard of this regulation?

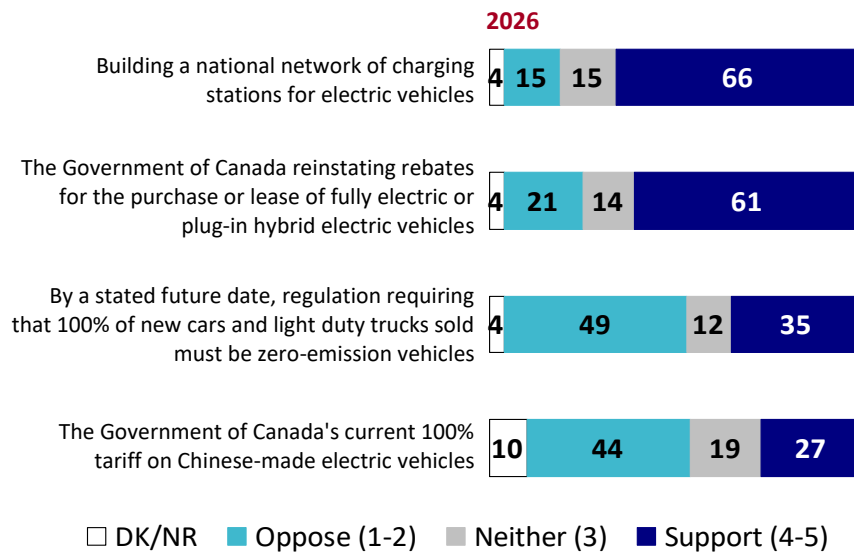
Base: Canadians; n=3,035

- Those willing to pay more for a zero-emission vehicle than an equivalent conventional one (73 per cent), Alberta residents (71 per cent), and men (71 per cent) are more likely to say they have heard of this regulation. Those under 35 (43 per cent) are more likely to say they have not heard of this regulation.
- Familiarity with this regulation rises progressively with household income (from 40 per cent among those earning less than \$40,000 to 71 per cent among those earning \$150,000 or more).

Support for ZEV policies

Canadians were also asked whether they support or oppose a variety of policies regarding ZEVs. There is strong support for building a national network of charging stations for electric vehicles (66 per cent) and reinstating rebates for the purchase or lease of fully electric or plug-in hybrid electric vehicles (61 per cent). However, only one in three (35 per cent) support a sales mandate ensuring that by a future date, all new vehicles sold must be ZEVs, and just one in four (27 per cent) support the Government of Canada's 100 per cent tariff on Chinese-made electric vehicles.

Chart 28: Support for ZEV policies



Q27a-d. How much do you support or oppose the following policies?

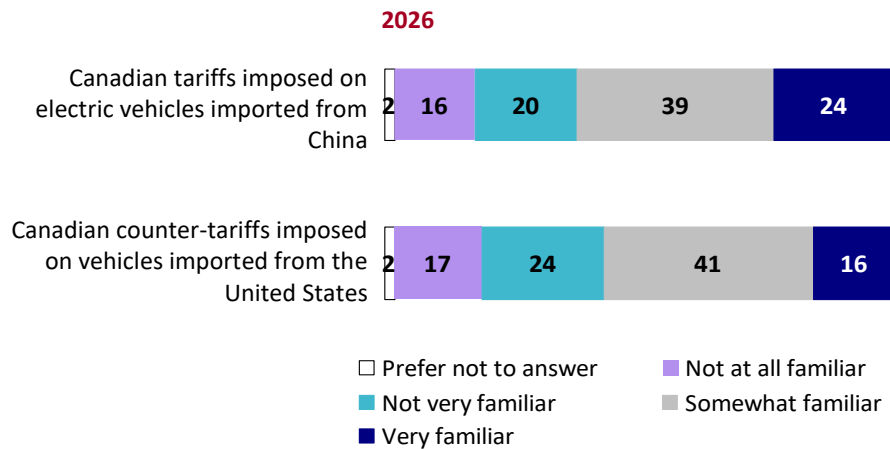
Base: Canadians; n=3,035

- Residents of Quebec (50 per cent), those under 35 (51 per cent), women (51 per cent), university graduates (48 per cent), and those willing to pay more for a zero-emission vehicle than an equivalent conventional one (55 per cent) are more likely to oppose the tariff on Chinese-made electric vehicles, while they are consistently more likely to say they support the remaining three policies.
- Residents of Alberta are more likely to say they oppose building a national network of charging stations (25 per cent), reinstating rebates for electric or plug-in hybrid electric vehicles (31 per cent), and mandating that all new vehicles are ZEVs (63 per cent).

Familiarity with vehicle tariffs

A clear majority of Canadians say they are either very (24 per cent) or somewhat (39 per cent) familiar with Canadian tariffs imposed on electric vehicles imported from China, while 36 per cent say they are not very familiar or not at all familiar. A somewhat lesser majority say they are either very (16 per cent) or somewhat (41 per cent) familiar with Canadian counter-tariffs imposed on vehicles imported from the United States.

Chart 29: Familiarity with vehicle tariffs



Q28-Q29. How familiar are you with the following?

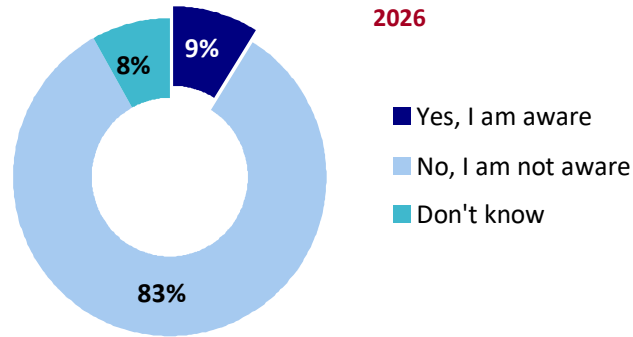
Base: Canadians; n=3,035

- Residents of BC are more likely to say they are at least somewhat familiar with the tariffs imposed on Chinese electric vehicles (72 per cent, compared to 63 per cent overall). Residents of Quebec are more likely to say they are not familiar with either set of tariffs.
- Self-rated familiarity with both sets of tariffs is higher among men and those willing to pay more for a zero-emission vehicle than an equivalent conventional one, and rises progressively with household income.

Awareness of other measures to offset tariffs

Just one in ten Canadians (nine per cent) say they are aware of any Canadian programs or incentives intended to offset tariffs on zero-emission vehicles imported from the US, while the vast majority (83 per cent) are not. Eight per cent are unsure.

Chart 30: Awareness of other measures to offset tariffs



Q30B. Are you aware of any Canadian programs or incentives measures that offset counter tariffs on ZEVs imported from the U.S.?

Base: Canadians; n=3,035

Impact of tariffs on ZEV purchases

Respondents were asked, in an open-ended question (i.e., unprompted), whether tariffs or trade policies affecting Canada’s automotive sector are influencing their decisions to purchase or lease a ZEV. Most (73 per cent) said these policies are not affecting their behaviour, while seven per cent preferred not to answer. Among those who reported an impact, the most common response was boycotting specific markets (seven per cent). Others pointed to rising vehicle, maintenance, or parts costs (five per cent) or said they are exploring vehicles from other countries (four per cent).

Table 9: Impact of tariffs on ZEV purchases

Q30C. Thinking about tariffs or trade policies currently affecting Canada's automotive sector, are these influencing your decisions regarding purchasing/leasing ZEVs?	2026
Boycotting markets	7%
Increases costs of vehicle/maintenance/parts, price comparisons will dictate choice	5%
Will need to look to other countries market/vehicles, look elsewhere for options	4%
I buy Canadian/try to if I can, prefer products that are made/mostly made in Canada	2%
Will delay/deter purchasing one	2%
Concerns with Canadian government policies/trade negotiations	2%
Limits/limited availability of options	1%
We need to be more independent, allow for more manufacturing and diversify markets here/open up to other possibilities and development	1%
Everything is unaffordable, cost of living too high, unemployment rising, cannot afford anything/need for stricter budget	1%
Avoiding EV's for other reasons	1%
No	73%
Prefer not to answer	7%

APPENDICES

A. METHODOLOGICAL DETAILS

The research involved an online survey of 3,035 Canadians. The survey was conducted across Canada in both official languages. The field dates for the survey were January 5-26, 2026.

We used our probability-based online panel, *Probit*, in undertaking this survey. *Probit* is an online research panel that has been designed by EKOS to provide statistically representative data. Our panel offers complete coverage of the Canadian population (Internet, phone, cell phone), random recruitment (participants are recruited randomly; they do not opt themselves into our panel), and equal probability sampling. All respondents to our panel are recruited by telephone using random digit dialling, and their demographic information is confirmed by live interviewers.

The distribution of the recruitment process for our panel mirrors the actual population in Canada (as defined by Statistics Canada). As such, our panel can be considered representative of the general public (survey results from our online panel support confidence intervals and margin of error estimates). The overall panel size is roughly 135,000 Canadian households. Random stratified samples are drawn from the panel database for individual research assignments.

All survey results were weighted by region, age and gender according to Statistics Canada data, to ensure results are representative of the Canadian public. The margin of error for a survey of $n=3,035$ is +/- 1.7 percentage points, 19 times out of 20.

Sample design, weighting and respondent profile

The sampling method was designed to complete interviews with at least 3,000 Canadians ages 18 and over. Quotas were set by age, gender, and region. The survey obtained the following distribution:

Table 10: Sample distribution

Variable	% of population	Target (quota)	% of sample	Actual Unweighted	Actual Weighted*
Jurisdiction					
Newfoundland and Labrador	1%	100	3%	96	47
Nova Scotia	3%	135	5%	144	85
Prince Edward Island	<1%	65	2%	55	13
New Brunswick	2%	100	3%	99	69
Quebec	23%	650	22%	682	689
Ontario	39%	750	25%	801	1,157
Manitoba	4%	150	5%	132	108
Saskatchewan	3%	150	5%	136	95
Alberta	11%	400	13%	380	337
British Columbia	14%	450	15%	472	422
Territories	<1%	50	2%	25	12
Age					
18-34	27%	630	21%	599	810
35-54	32%	1,070	36%	1,063	962
55+	41%	1,370	46%	1,327	1,217
Gender					
Male	49%	1,475	49%	1,493	1,450
Female	51%	1,525	51%	1,489	1,532

The following table presents the weighted distribution of survey participants by specific variables.

Table 11: Weighted distribution by specific variables

Variable	Total sample %	% of population
Education ^α		
High school or less	22	39
Apprentice/college/some university	34	32
University graduate/post-graduate	43	29
Total annual household income⁺		
Under \$40,000	12	19
\$40,000-<\$80,000	19	28
\$80,000-<\$100,000	12	12
\$100,000-<\$150,000	20	20
\$150,000 or more	27	20

^α Actual Census categories differ from those used in this survey; categories have been adjusted to correspond. Statistics Canada figures for education are for Canadians aged 25 to 64 years. For employment age 15+.
⁺ Percentage of those providing a response.

Questionnaire design

NRCan provided EKOS with a draft questionnaire for review and comment. In consultation with NRCan, EKOS revised and finalized the questionnaire.

EKOS data analysts programmed the final questionnaire and performed thorough testing to ensure accuracy in set-up and data collection. This validation ensured that the data entry process conformed to the surveys' basic logic. The data collection system handles sampling invitations, quotas and questionnaire completion (skip patterns, branching, and valid ranges). The client was also given the opportunity to test the survey links.

Prior to finalizing the survey for field, a pre-test (soft launch) was conducted in English and French. The pre-test assessed the questionnaires in terms of question wording and sequencing, respondent sensitivity to specific questions and to the survey overall, and to determine the survey length; standard Government of Canada pre- testing questions were also asked.

The final survey questionnaire is included in Appendix B.

Fieldwork

The survey was conducted by EKOS using a secure, fully featured web-based survey environment. The average interview length was 18 minutes.

All respondents were offered the opportunity to complete the surveys in their official language of choice. All research work was conducted in accordance with the Standards for the Conduct of Government of Canada Public Opinion Research – Online Surveys and recognized industry standards, as well as applicable federal legislation (*The Privacy Act, Personal Information Protection and Electronic Documents Act, and Access to Information Act*).

Following data collection, the data from this survey were statistically weighted to ensure the sample is representative of the Canadian population according to the most recently available Census information.

Completion results

The completion results are presented in the following table.

Table 12: Contact disposition

Disposition	N
Total invitations (c)	14,618
Invalid	83
Total completes (d)	3,035
Qualified break-offs (e)	481
Disqualified (f)	0
Not responded (g)	11, 019
Quota filled (h)	0
Contact rate = (d+e+f+h)/c	24%
Participation rate = (d+f+h)/c	21%

Non-response bias analysis

The table below presents a profile of the final sample, compared to the actual population of Canada (2021 Census information). As is the case with most surveys, the final sample underrepresents those with high school or less education, which is a typical pattern for public opinion surveys in Canada (e.g., those with more education are more likely to respond to surveys). This is also the case, to a lesser degree, among those under 35.

Table 13: Non-response bias analysis

Sample type	Sample*	Canada (2021 Census)
Gender (18+)		
Male	49%	49%
Female	49%	51%
Age		
18-34	20%	27%
35-54	35%	32%
55+	44%	41%
Education level ^α		
High school diploma or less	22%	39%
Trades/college/post sec no degree	34%	32%
University degree	43%	29%

* Data are unweighted and percentaged on those giving a response to each demographic question

^α Actual Census categories differ from those used in this survey and have been recalculated to correspond. Statistics Canada figures for education are for Canadians aged 25 to 64 years.

B. SURVEY QUESTIONNAIRE

WINTRO

Si vous préférez répondre au sondage en français, veuillez cliquer sur français.
Thank you for agreeing to complete this survey. We are conducting a survey with Canadians 18 years of age or older on behalf of the Government of Canada about vehicle ownership and use. A few reminders before beginning :

Please rest assured that your answers are completely confidential (this means that no individual will be associated with the survey's results - rather, they will be rolled up into large categories to protect the confidentiality of each respondent) and that this survey is voluntary. It is being directed by EKOS Research, and administered according to the requirements of the *Privacy Act*. To view our privacy policy, click here. The survey is registered with the Canadian Research Insights Council's (CRIC) Research Verification Service System. Click here if you wish to verify its authenticity (project code 20251215-EK716).

INSTRUCTIONS

- On each screen, after selecting your answer, click on the "Continue" button at the bottom of the screen to move forward in the questionnaire.
- The survey takes an average of about 15 minutes to complete. If you leave the survey before completing it, you can return to the survey URL later, and you will be returned to the page where you left off. Your answers up to that point in the survey will be saved.
- If you have any questions about how to complete the survey, need help with or a different way to complete it, please call EKOS at 1-866-211-8881 or email us at online@ekos.com. Thank you in advance for your participation.

QA

These first few questions will help us to understand more about you and any recent vehicle purchases you have made or intend to make in the near future.

Do you plan to purchase or lease a new or used personal vehicle for yourself or others in the next 10 years?

Yes	1
No	2
Don't know	9

Q1

Approximately when do you plan to purchase or lease a new or used personal vehicle for yourself or others:

In the next 6 months	1
In the next 6 months to 1 year	2
In the next 1 to 2 years	3
In the next 2 to 5 years	4
More than 5 years from now	5

Don't know 9

Q2 [1,11]

What size or type of personal vehicle will you be considering for lease or purchase?

Check all that apply.

Small car	1
Midsize car	2
Large car	3
Small sport utility (SUV)/crossover	4
Midsize sport utility/crossover	5
Large sport utility/crossover	6
Van or minivan	7
Pick-up truck	8
Other (name) :	77
Don't know	99

Q3

Do you plan to purchase a new or previously owned vehicle?

New	1
Previously owned	2
Don't know/not sure	9

Q4

What will likely be the total purchase price of the vehicle you plan to purchase or lease?

Less than \$10,000	1
\$10,000-\$24,999	2
\$25,000-\$39,999	3
\$40,000-\$54,999	4
\$55,000-\$74,999	5
\$75,000 or more	6
Don't know/not sure	9

Q5

How many personal vehicles do you currently have in your household?

None	98
1	1
2	2
3 or more	3
Don't know	99

Q6

Now we have a few questions about your driving habits and needs.

How many kilometres do you drive your personal vehicle in a typical week (from Monday to Friday)?

Less than 99 km	1
100 to 199 km	2
200 to 299 km	3
300 to 399 km	4
400 to 499 km	5
500 to 599 km	6
600 km or more	7
I don't drive my personal vehicle on a typical week day	8
Don't know	99

Q7

How many kilometres do you drive your personal vehicle on a typical weekend?

Less than 99 km	1
100 to 199 km	2
200 to 299 km	3
300 to 399 km	4
400 to 499 km	5
500 to 599 km	6
600 km or more	7
I don't drive my personal vehicle on a typical weekend	8
Don't know	99

Q8

Thinking about the last time you took a vacation using your personal vehicle, what is the longest distance you drove in a single day?

Less than 99 km	1
100 to 199 km	2
200 to 299 km	3
300 to 399 km	4
400 to 499 km	5
500 to 599 km	6
600 km or more	7
I don't take vacations using my personal vehicle	8
Don't know	99

PQ9

Now, we have a few questions about zero-emission vehicles.

A zero-emission vehicle (ZEV), often commonly referred to as an electric vehicle, or "EV", is a vehicle that can be driven without producing polluting exhaust.

There are three types of ZEVs:

battery-electric

plug-in hybrid electric

hydrogen fuel cell

Q9

Do you currently own or lease a zero-emission vehicle (a vehicle that runs on electricity)?

Yes	1
No	2
Don't know	9

Q10

Is a zero-emission vehicle your primary vehicle?

Yes	1
No	2
Don't know	9

Q11

Have you ever driven or ridden in a zero-emission vehicle?

Yes	1
No	2
Don't know	9

Q12 [1,2]

Have you been a driver, a passenger or both in a <HOVER="A zero-emission vehicle (ZEV), often commonly referred to as an electric vehicle, includes battery-electric, plug-in hybrid electric and hydrogen fuel cell.">zero-emission vehicle> ?

Select all that apply.

I have been a driver	1
I have been a passenger	2
Don't know	9

Q13

How did your experience in a <HOVER="A zero-emission vehicle (ZEV), often commonly referred to as an electric vehicle, includes battery-electric, plug-in hybrid electric and hydrogen fuel cell.">zero-emission vehicle> compare to your experience in a gas-powered vehicle?

Much more enjoyable than a gas-powered vehicle	1
Somewhat more enjoyable than a gas-powered vehicle	2
About the same as a gas-powered vehicle	3

Somewhat less enjoyable than a gas-powered vehicle	4
Much less enjoyable than a gas-powered vehicle	5
Don't know	9

CALCQ13

much more enjoyable than a gas-powered vehicle	1
somewhat more enjoyable than a gas-powered vehicle	2
about the same as a gas-powered vehicle	3
somewhat less enjoyable than a gas-powered vehicle	4
much less enjoyable than a gas-powered vehicle	5
Don't know	9

Q13B [1,3]

In your own words, explain in what way your <HOVER="A zero-emission vehicle (ZEV), often commonly referred to as an electric vehicle, includes battery-electric, plug-in hybrid electric and hydrogen fuel cell.">zero-emission vehicle> experience was CALCQ13 ?

Please specify :	77
Prefer not to answer	99

Q14

How interested, if at all, would you be in taking a <HOVER="A zero-emission vehicle (ZEV), often commonly referred to as an electric vehicle, includes battery-electric, plug-in hybrid electric and hydrogen fuel cell.">zero-emission vehicle> for a test drive?

Very interested	1
Somewhat interested	2
Only a little interested	3
Not at all interested	4
Don't know	9

Q15 [1,8]

Why would you not be interested in taking a zero-emission vehicle for a test drive?

Select all that apply

No zero-emission models that I prefer or are suitable for my lifestyle are available for test driving	1
No dealerships or test drives are near or convenient to me	2
Test drives are run by biased people	3
Test drives are run by unknowledgeable people	4
I am not planning on buying a zero-emission vehicle	5
Other (please specify) :	77
Don't know	99

Q16

Do you know an owner of a <HOVER="A zero-emission vehicle (ZEV), often commonly referred to as an electric vehicle, includes battery-electric, plug-in hybrid electric and hydrogen fuel cell.">zero-emission vehicle> ? For example, a friend, family member, neighbour or colleague.

Yes	1
No	2
Don't know	9

PQ17

Please name any <HOVER="A zero-emission vehicle (ZEV), often commonly referred to as an electric vehicle, includes battery-electric, plug-in hybrid electric and hydrogen fuel cell.">zero-emission vehicle> makes and models (company and specific car, SUV or truck name) of which you are aware.

Q17A [0,5]

Vehicle 1	
Please specify :	77
Don't know	99

Q17B [0,5]

Vehicle 2	
Please specify :	77
Don't know	99

Q17C [0,5]

Vehicle 3	
Please specify :	77
Don't know	99

Q17D [0,5]

Vehicle 4	
Please specify :	77
Don't know	99

Q17E [0,5]

Vehicle 5	
Please specify :	77
Don't know	99

Q18 [1,5]

If you were considering purchasing or leasing a zero-emission vehicle, which information would interest you the most?

Choose up to 5:

How to charge a zero-emission vehicle	1
Availability of makes and models in your area	2

Vehicle safety	3
Vehicle maintenance costs compared to an equivalent gas car	4
Purchase price	5
Costs to charge a zero-emission vehicle	6
Environmental impact compared to an equivalent gas car	7
Different levels, or speeds, of vehicle charging equipment	8
How to install a vehicle charger at your home	9
Driving range – how far a vehicle can go on a fully charged battery	10
Time required to charge the battery	11
Resale value	12
Subsidies for new/used vehicle purchase	13
Reliability	14
Battery life expectancy	15
Warranty	16
Cost of insurance	17
Towing capacity	18
Availability of all-wheel drive	19
Winter performance	20
Driving range in cold weather compared to gas vehicles	21
The carbon footprint over a vehicle's lifetime (i.e., from manufacture, use and disposal)	22
Don't know	99

Q19

Have you considered purchasing or leasing a zero-emission vehicle (a vehicle that runs on electricity) for your household?

Yes	1
No	2
Don't know	9

Q20

How likely or unlikely are you to purchase a zero-emission vehicle as your next vehicle?

Very likely	1
Somewhat likely	2
Somewhat unlikely	3
Very unlikely	4
I would not purchase a zero-emission vehicle	5
Don't know	98
Prefer not to answer	99

Q21 [1,14]

In the past 12 months, which of the following, if any, experiences have you had, or actions have you taken, related to zero-emission vehicles?

Select all that apply

Visited a car dealership to learn more about zero-emission vehicles	1
Test driven a zero-emission vehicle at a dealership	2
Test driven a zero-emission vehicle at a special event	3
Test driven a friend or colleague's zero-emission vehicle	4
Rented a zero-emission vehicle	5
Visited an Autoshow or convention and learned more about zero-emission vehicles	6
Visited a car manufacturer's website to research zero-emission vehicles	7
Visited a federal government website to research incentives for purchasing or leasing a zero-emission vehicle	8
Visited a provincial government website to research incentives for purchasing or leasing a zero-emission vehicle	9
Talked to a friend, family member, or colleague about zero-emission vehicles	10
Done an internet search (e.g. Google search) about zero-emission vehicles	11
Seen social media content (e.g. Facebook, Instagram) about zero-emission vehicles	12
Read or heard a news story that gave negative information about zero-emission vehicles	13
Read or heard a news story that gave positive information about zero-emission vehicles	14
None of the above	15
Don't know	99

PQ22A

Please indicate whether you agree or disagree with each of the following statements about zero-emission vehicles.

Q22A

High gas prices help make the purchase of zero-emission vehicles more attractive

Strongly agree	1
Somewhat agree	2
Neither agree nor disagree	3
Somewhat disagree	4
Strongly disagree	5
I Don't know	9

Q22G

Zero-emission vehicles are too expensive	
Strongly agree	1
Somewhat agree	2
Neither agree nor disagree	3
Somewhat disagree	4
Strongly disagree	5
I Don't know	9

Q22H

Gas/diesel vehicles are too expensive	
Strongly agree	1
Somewhat agree	2
Neither agree nor disagree	3
Somewhat disagree	4
Strongly disagree	5
I Don't know	9

Q22K

The repair and maintenance costs for a zero-emission vehicle are lower than for a gas or diesel-powered vehicle	
Strongly agree	1
Somewhat agree	2
Neither agree nor disagree	3
Somewhat disagree	4
Strongly disagree	5
I Don't know	9

Q22Q

A zero-emission vehicle would save me money in the long run	
Strongly agree	1
Somewhat agree	2
Neither agree nor disagree	3
Somewhat disagree	4
Strongly disagree	5
I Don't know	9

Q22R

Zero-emission vehicles have poor resale value	
Strongly agree	1
Somewhat agree	2
Neither agree nor disagree	3
Somewhat disagree	4
Strongly disagree	5

I Don't know 9

Q22V

There is an affordable zero-emission vehicle available that meets the needs of my lifestyle

Strongly agree 1
Somewhat agree 2
Neither agree nor disagree 3
Somewhat disagree 4
Strongly disagree 5
I Don't know 9

Q22U

I am worried that charging a zero-emission vehicle at home will significantly increase my monthly electricity bill

Strongly agree 1
Somewhat agree 2
Neither agree nor disagree 3
Somewhat disagree 4
Strongly disagree 5
I Don't know 9

PQ22D

Please indicate whether you agree or disagree with each of the following statements about zero-emission vehicles.

Q22D

There are too few, if any, publicly available charging stations where I drive

Strongly agree 1
Somewhat agree 2
Neither agree nor disagree 3
Somewhat disagree 4
Strongly disagree 5
I Don't know 9

Q22J

Zero-emission vehicles can't travel far enough on a full charge

Strongly agree 1
Somewhat agree 2
Neither agree nor disagree 3
Somewhat disagree 4
Strongly disagree 5
I Don't know 9

Q22L

I can charge a zero-emission vehicle at my home	
Strongly agree	1
Somewhat agree	2
Neither agree nor disagree	3
Somewhat disagree	4
Strongly disagree	5
I Don't know	9

Q22P

I can charge a zero-emission vehicle at my workplace	
Strongly agree	1
Somewhat agree	2
Neither agree nor disagree	3
Somewhat disagree	4
Strongly disagree	5
I Don't know	9

Q22S

If too many people purchase zero-emission vehicles, it will put too much pressure on the electricity grid	
Strongly agree	1
Somewhat agree	2
Neither agree nor disagree	3
Somewhat disagree	4
Strongly disagree	5
I Don't know	9

PQ22I

Please indicate whether you agree or disagree with each of the following statements about zero-emission vehicles.

Q22I

Zero-emission vehicles are less damaging to the environment than gas or diesel-powered vehicles	
Strongly agree	1
Somewhat agree	2
Neither agree nor disagree	3
Somewhat disagree	4
Strongly disagree	5
I Don't know	9

Q22N

Gas or diesel-powered vehicles are safer than zero-emission vehicles	
Strongly agree	1
Somewhat agree	2

Neither agree nor disagree	3
Somewhat disagree	4
Strongly disagree	5
I Don't know	9

Q22O

Hydrogen fuel cell electric vehicles are more dangerous than other kinds of vehicles

Strongly agree	1
Somewhat agree	2
Neither agree nor disagree	3
Somewhat disagree	4
Strongly disagree	5
I Don't know	9

Q22T

Zero-emission vehicles contribute significantly to a reduction of greenhouse gas emissions and air pollutants compared to gas or diesel-powered vehicles

Strongly agree	1
Somewhat agree	2
Neither agree nor disagree	3
Somewhat disagree	4
Strongly disagree	5
I Don't know	9

Q22X

Zero-emission vehicles don't have the same towing ability as conventional vehicles

Strongly agree	1
Somewhat agree	2
Neither agree nor disagree	3
Somewhat disagree	4
Strongly disagree	5
I Don't know	9

Q22W

Zero-emission vehicles perform poorly in cold weather

Strongly agree	1
Somewhat agree	2
Neither agree nor disagree	3
Somewhat disagree	4
Strongly disagree	5
I Don't know	9

PQ22M

Please indicate whether you agree or disagree with each of the following statements about zero-emission vehicles.

Q22M

The style/type of vehicle I prefer isn't available as a zero-emission vehicle	
Strongly agree	1
Somewhat agree	2
Neither agree nor disagree	3
Somewhat disagree	4
Strongly disagree	5
I Don't know	9

Q22E

It is difficult to find credible sources of information about zero-emission vehicles	
Strongly agree	1
Somewhat agree	2
Neither agree nor disagree	3
Somewhat disagree	4
Strongly disagree	5
I Don't know	9

Q22F

I would only buy a zero-emission vehicle as a second vehicle for our household, while keeping a gas or diesel-powered vehicle as well	
Strongly agree	1
Somewhat agree	2
Neither agree nor disagree	3
Somewhat disagree	4
Strongly disagree	5
I Don't know	9

Q22CHK

To help us ensure data quality, please select "Strongly agree" for this question.	
Strongly agree	1
Somewhat agree	2
Neither agree nor disagree	3
Somewhat disagree	4
Strongly disagree	5

Q23

Which of the following statements is closest to your own point of view?

- I would be willing to pay more for a zero-emission vehicle than an equivalent gas or diesel-powered vehicle 1
- I would only buy or lease a zero-emission vehicle if the price were about the same as an equivalent gas or diesel-powered vehicle 2
- I would only buy or lease a zero-emission vehicle if the price were lower than an equivalent gas or diesel-powered vehicle 3
- I would never buy a zero-emission vehicle 4
- Don't know 9

PQ24A

How much of an impact, if any, would each of the factors below have on your likelihood of purchasing or leasing a zero-emission vehicle? Would it make you ...

Q24A

Lower fuel costs to operate a zero-emission vehicle

- Much more likely to purchase 1
- Somewhat more likely to purchase 2
- A bit more likely to purchase 3
- Have no impact 4
- Don't know 9

Q24C

Lower maintenance costs than a similar gas vehicle

- Much more likely to purchase 1
- Somewhat more likely to purchase 2
- A bit more likely to purchase 3
- Have no impact 4
- Don't know 9

Q24F

Lower total cost of owning and operating the vehicle (including purchasing, charging (fuel), maintenance and repairs, compared to similar gas vehicles)

- Much more likely to purchase 1
- Somewhat more likely to purchase 2
- A bit more likely to purchase 3
- Have no impact 4
- Don't know 9

Q24G

Similar monthly payments compared to gas vehicles

- Much more likely to purchase 1
- Somewhat more likely to purchase 2

A bit more likely to purchase	3
Have no impact	4
Don't know	9

Q24J

Rebates/incentives for purchasing or leasing the vehicle	
Much more likely to purchase	1
Somewhat more likely to purchase	2
A bit more likely to purchase	3
Have no impact	4
Don't know	9

Q24K

Rebates/incentives for purchasing or installing a charging station at home	
Much more likely to purchase	1
Somewhat more likely to purchase	2
A bit more likely to purchase	3
Have no impact	4
Don't know	9

Q24D

Selection of makes and models similar to that of gas vehicles	
Much more likely to purchase	1
Somewhat more likely to purchase	2
A bit more likely to purchase	3
Have no impact	4
Don't know	9

PQ24H

How much of an impact, if any, would each of the factors below have on your likelihood of purchasing or leasing a zero-emission vehicle? Would it make you ...

Q24H

Better towing capacity than a similar gas vehicle	
Much more likely to purchase	1
Somewhat more likely to purchase	2
A bit more likely to purchase	3
Have no impact	4
Don't know	9

Q24I

10-year battery warranty	
Much more likely to purchase	1
Somewhat more likely to purchase	2

A bit more likely to purchase	3
Have no impact	4
Don't know	9

Q24R

A lower total carbon footprint over its manufacturing, use and disposal compared to a gas vehicle

Much more likely to purchase	1
Somewhat more likely to purchase	2
A bit more likely to purchase	3
Have no impact	4
Don't know	9

Q24L

Equal or greater driving range than a gas or diesel vehicle

Much more likely to purchase	1
Somewhat more likely to purchase	2
A bit more likely to purchase	3
Have no impact	4
Don't know	9

Q24M

Having access to a charging station at home

Much more likely to purchase	1
Somewhat more likely to purchase	2
A bit more likely to purchase	3
Have no impact	4
Don't know	9

Q24N

Convenient access to charging stations at my workplace

Much more likely to purchase	1
Somewhat more likely to purchase	2
A bit more likely to purchase	3
Have no impact	4
Don't know	9

Q24O

More charging stations in public parking lots and shopping destinations

Much more likely to purchase	1
Somewhat more likely to purchase	2
A bit more likely to purchase	3
Have no impact	4
Don't know	9

Q24P

More charging stations along highways	
Much more likely to purchase	1
Somewhat more likely to purchase	2
A bit more likely to purchase	3
Have no impact	4
Don't know	9

Q24Q

Convenient locations of public charging stations	
Much more likely to purchase	1
Somewhat more likely to purchase	2
A bit more likely to purchase	3
Have no impact	4
Don't know	9

Q24E

Proven winter weather performance	
Much more likely to purchase	1
Somewhat more likely to purchase	2
A bit more likely to purchase	3
Have no impact	4
Don't know	9

PQ25A

How much of an impact, if any, would each of the factors below have on your likelihood of purchasing or leasing a zero-emission vehicle? Would it make you ...

Q25A

The vehicle is being imported from the United States	
Much less likely to purchase	1
Somewhat less likely to purchase	2
A bit less likely to purchase	3
Have no impact	4
Don't know	9

Q25B

The vehicle is being imported from China	
Much less likely to purchase	1
Somewhat less likely to purchase	2
A bit less likely to purchase	3
Have no impact	4
Don't know	9

Q25C

Over the past three months, have you been able to afford bills associated with vehicle ownership, including monthly payments, fuel or charging costs, maintenance, and insurance?

Yes, with ease	1
Yes, but with difficulty	2
No	3
I don't own a vehicle	4
Prefer not to answer	99

Q26

Canada's *Electric Vehicle Availability Standard* is a federal regulation requiring that a stated percent of all new light duty vehicles for sale in Canada, including cars, SUVs and pick-up trucks, must be zero-emission vehicles (ZEVs). The required sales targets will increase annually so that eventually all new vehicle sales will be ZEVs.

Have you heard of this regulation?

Yes, I have heard of this regulation	1
No, I haven't heard of this regulation	2
Don't know	9

PQ27

How much do you support or oppose the following policies?

Q27A

By a stated future date, regulation requiring that 100% of new cars and light duty trucks sold must be zero-emission vehicles

Strongly Support	1
Somewhat Support	2
Neutral	3
Somewhat Oppose	4
Strongly Oppose	5
Don't know/ Prefer not to answer	9

Q27B

The Government of Canada's current 100% tariff on Chinese-made electric vehicles

Strongly Support	1
Somewhat Support	2
Neutral	3
Somewhat Oppose	4
Strongly Oppose	5
Don't know/ Prefer not to answer	9

Q27C

The Government of Canada reinstating rebates for the purchase or lease of fully electric or plug-in hybrid electric vehicles

Strongly Support	1
Somewhat Support	2
Neutral	3
Somewhat Oppose	4
Strongly Oppose	5
Don't know/ Prefer not to answer	9

Q27D

Building a national network of charging stations for electric vehicles

Strongly Support	1
Somewhat Support	2
Neutral	3
Somewhat Oppose	4
Strongly Oppose	5
Don't know/ Prefer not to answer	9

PQ28

How familiar are you with the following?

Q28

Canadian tariffs imposed on electric vehicles imported from China

Very familiar	1
Somewhat familiar	2
Not very familiar	3
Not at all familiar	4
Prefer not to answer	9

Q29

Canadian counter-tariffs imposed on vehicles imported from the United States

Very familiar	1
Somewhat familiar	2
Not very familiar	3
Not at all familiar	4
Prefer not to answer	9

Q30B

Are you aware of any Canadian programs or incentives measures that offset counter tariffs on ZEVs imported from the U.S.?

Yes, I am aware	1
No, I am not aware	2
Don't know	9

Q30C [1,3]

Thinking about tariffs or trade policies currently affecting Canada's automotive sector, are these influencing your decisions regarding purchasing/leasing ZEVs?

Yes, please specify how :	77
No	98
Prefer not to answer	99

QGENDR

These final few questions are for statistical purposes only. Your responses will be aggregated with those of other respondents to the survey and will help us to analyse different sub-groups of the population.

What is your gender?

Man	1
Woman	2
Prefer to specify :	77
Prefer not to answer	99

QAGEX

In what year were you born?

Year :	77
Prefer not to answer	99

QAGEY

Which of the following age categories do you belong to?

18-34	1
35-44	2
45-54	3
55-64	4
65 or older	5
Prefer not to answer	9

QPROV

In which province or territory of the country do you reside?

Newfoundland	1
Nova Scotia	2
Prince Edward Island	3
New Brunswick	4
Quebec	5
Ontario	6
Manitoba	7
Saskatchewan	8
Alberta	9
British Columbia	10
Northwest Territories/Yukon/Nunavut	11

Prefer not to answer 99

QEDUC

What is the highest level of formal education that you have completed?

Less than a high school diploma or equivalent	1
High School Diploma or equivalent	2
Registered Apprenticeship or other trades certificate or diploma	3
College, CEGEP, or other non-university certificate or diploma	4
University certificate or diploma below bachelor's level	5
Bachelor's degree	6
Post graduate degree above the bachelor's level	7
Prefer not to answer	9

QINC

Which of the following best describes your total household income last year, from all sources for all household members, before taxes?

Under \$20,000	1
\$20,000 to just under \$40,000	2
\$40,000 to just under \$60,000	3
\$60,000 to just under \$80,000	4
\$80,000 to just under \$100,000	5
\$100,000 to just under \$150,000	6
\$150,000 to just under \$200,000	7
\$200,000 to just under \$250,000	8
\$250,000 and above	9
Prefer not to answer	99

QHOME

Which of the following best describes the type of dwelling in which you live?

Single, detached home	1
Semi-detached	2
Townhome or row home	3
Apartment or condo	4
Other (please specify) :	77
Prefer not to answer	99

QLANE

Do you have access to your own driveway or indoor parking at home?

Yes	1
No	2
Prefer not to answer	9

QDISAB

Are you a person with a disability? A person with a disability is a person who has a long-term or recurring impairment (such as vision, hearing, mobility or mental health-related) which limits their daily activities inside or outside the home.

Yes	1
No	2
Prefer not to answer	9

Q38 [1,4]

Are you First Nations, Métis, or Inuk (Inuit)?

Note: First Nations (North American Indian) includes Status and Non-Status Indians. Please select all that apply.

No, not First Nations, Métis, or Inuk (Inuit)	1
Yes, First Nations (North American Indian)	2
Yes, Métis	3
Yes, Inuk (Inuit)	4
Prefer not to answer	99

QETHN [1,14]

You may belong to one or more racial or cultural groups on the following list. Are you ...?

Please select all that apply

Arab	1
Black	2
Chinese	3
Filipino	4
Japanese	5
Korean	6
Latin American	7
South Asian (e.g., East Indian, Pakistani, Sri Lankan, etc.)	8
Southeast Asian (e.g., Vietnamese, Cambodian, Malaysian, Thai, Laotian, etc.)	9
West Asian (e.g., Iranian, Afghan, etc.)	10
White	11
Other group (please specify) :	77
Prefer not to answer	99

QPOSTCELL

May we have the first three digits of your postal code?

Please specify :	77
Prefer not to answer	99

THNK

Those are all the questions we have for you. Thank you very much for taking the time to complete this survey, it is greatly appreciated. Your answers have been saved and you may now close your browser window.