



PUBLIC OPINION AND ELECTRIC VEHICLES

MARCH 2019

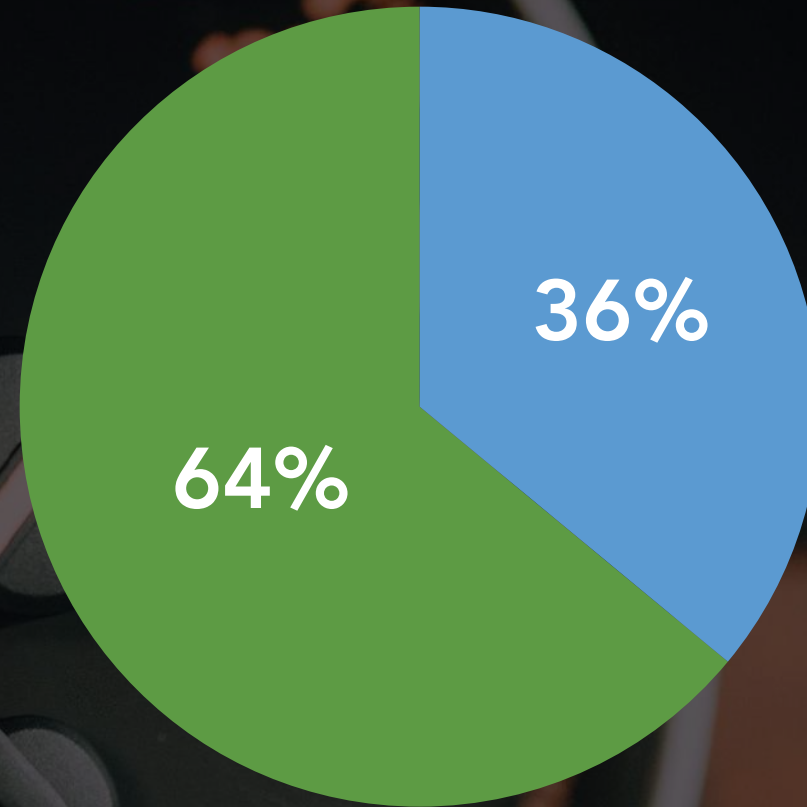
METHODOLOGY

SURVEY CONDUCTED ONLINE WITH 1,200 ADULTS AGED 18+, MARCH 2019. THE MARGIN OF ERROR FOR A COMPARABLE PROBABILITY-BASED RANDOM SAMPLE IS +/- 2.83%, 19 TIMES OUT OF 20.

DATA WERE WEIGHTED ACCORDING TO CENSUS TO ENSURE SAMPLE MATCHED CANADA'S POPULATION ACCORDING TO AGE, GENDER, EDUCATION, REGION.

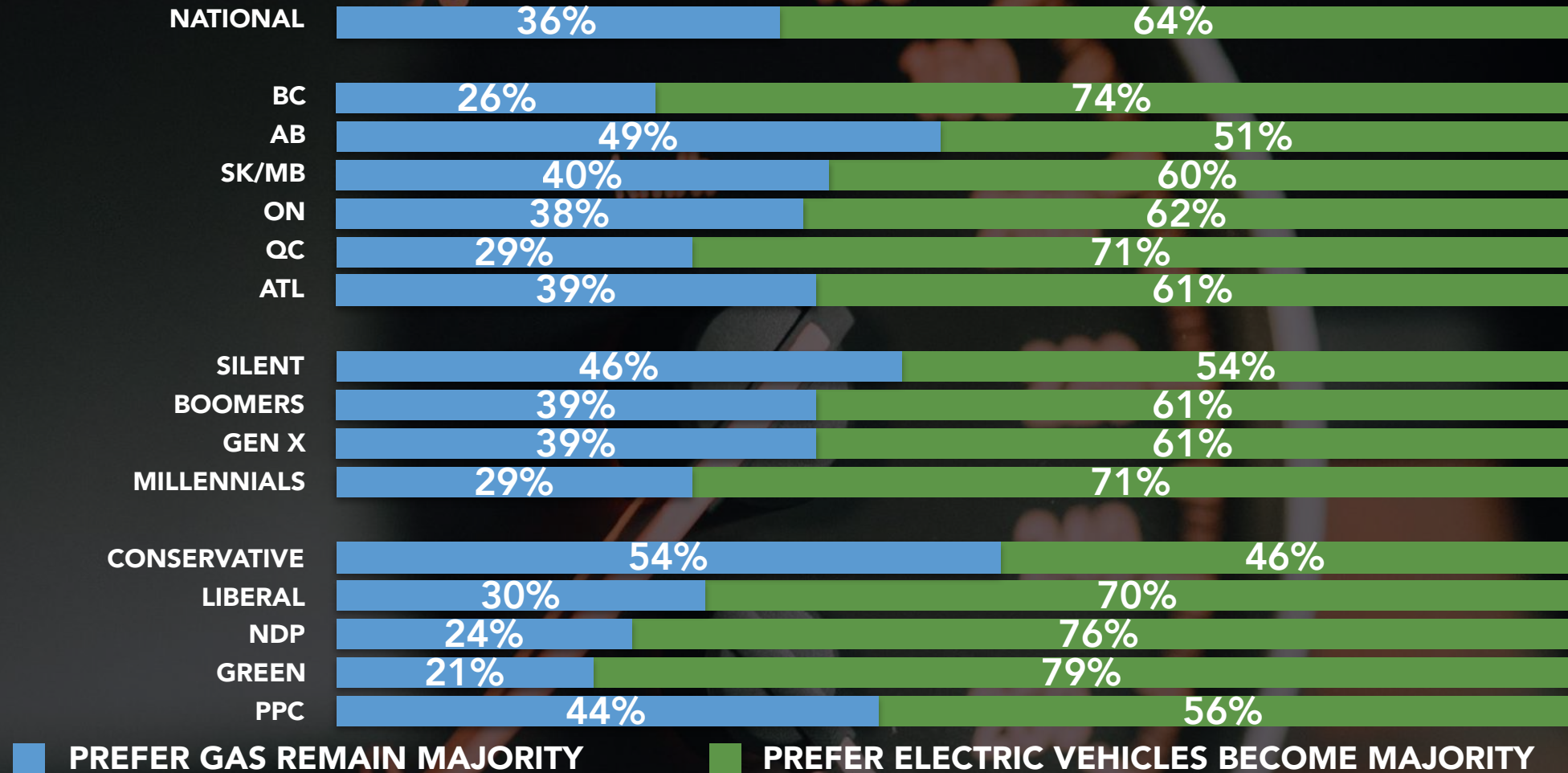
DO YOU WANT ELECTRIC VEHICLES TO BECOME THE MAJORITY OF CONSUMER VEHICLES SOLD?

IF IT WERE UP TO YOU, WOULD ELECTRIC CARS BECOME THE MAJORITY OF VEHICLES THAT CONSUMERS DRIVE AT SOME POINT IN THE FUTURE, OR WOULD YOU PREFER TO SEE GASOLINE/ DIESEL POWERED CARS REMAIN THE MAJORITY OF CARS?



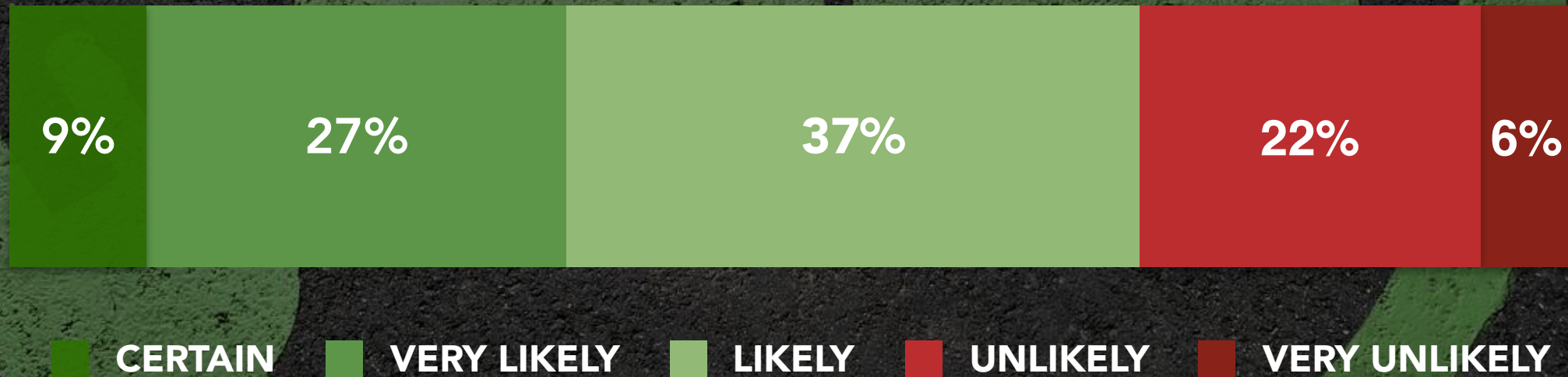
- PREFER GAS VEHICLES REMAIN MAJORITY
- PREFER ELECTRIC VEHICLES BECOME MAJORITY

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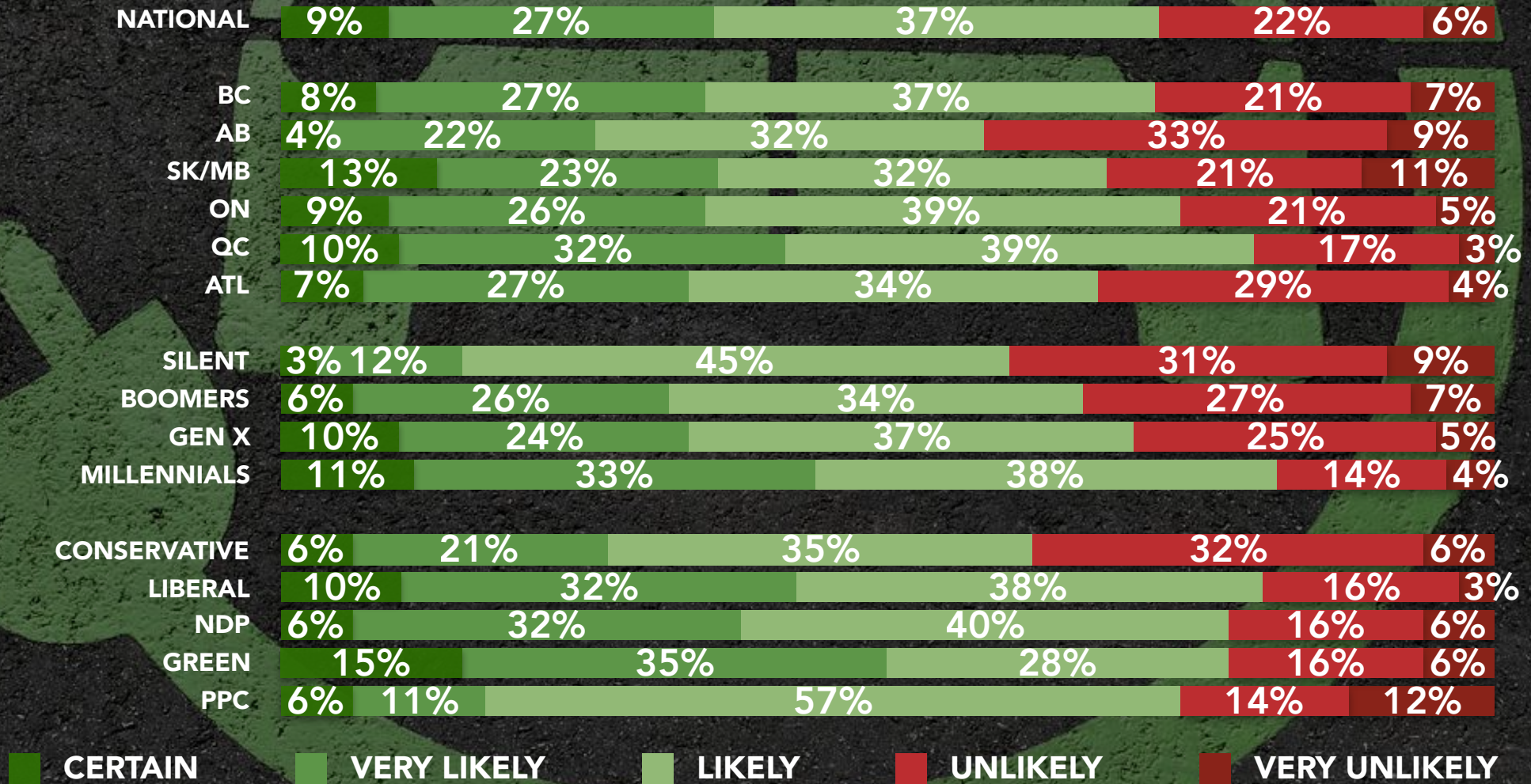
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WILL E-VEHICLES BECOME THE NORM?



DO YOU THINK IT IS CERTAIN, VERY LIKELY, LIKELY, UNLIKELY OR VERY UNLIKELY THAT ELECTRIC VEHICLES WILL BECOME THE MAJORITY OF CONSUMER VEHICLES SOLD AROUND THE WORLD?

WILL E-VEHICLES BECOME THE NORM?

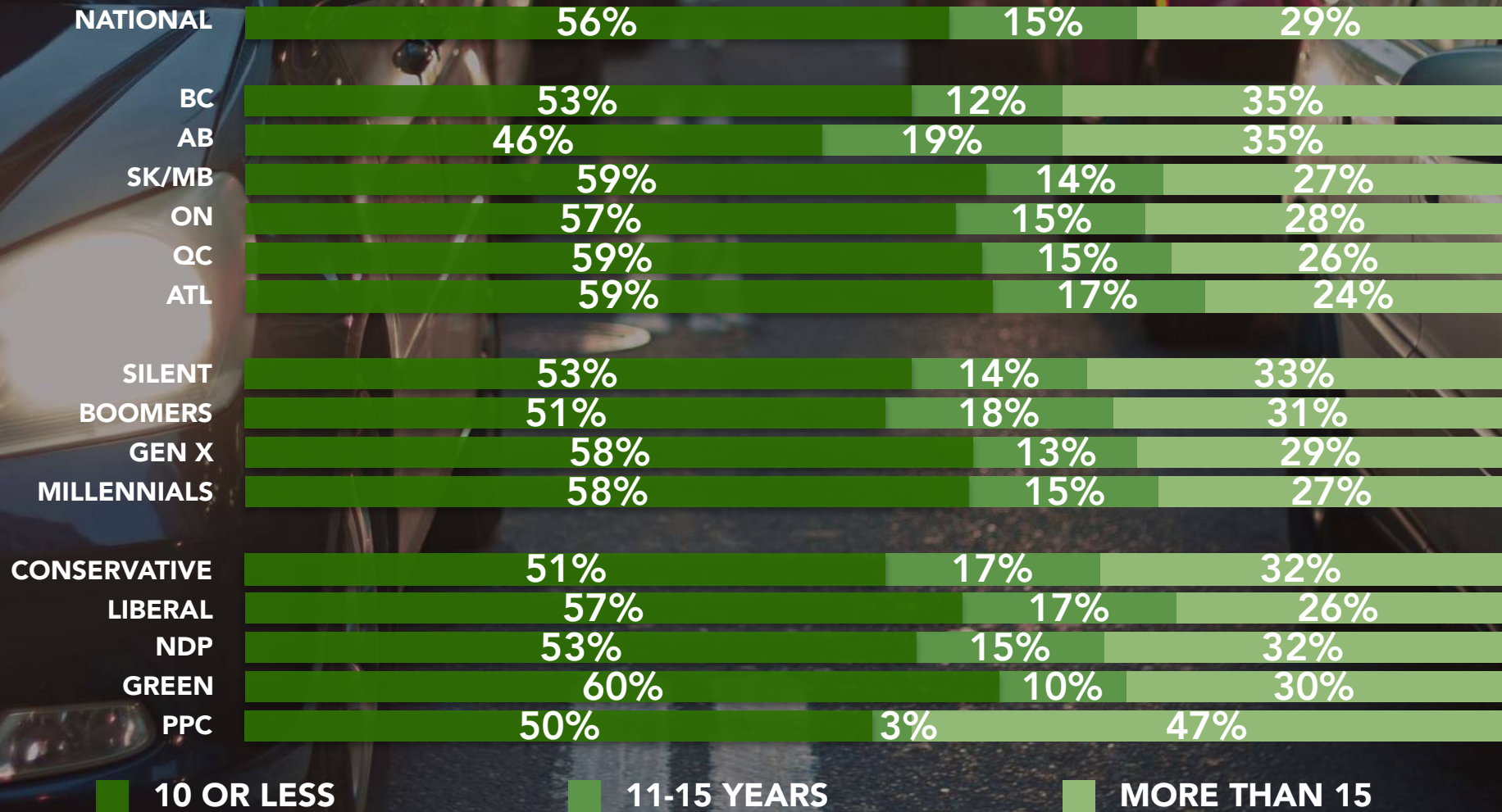


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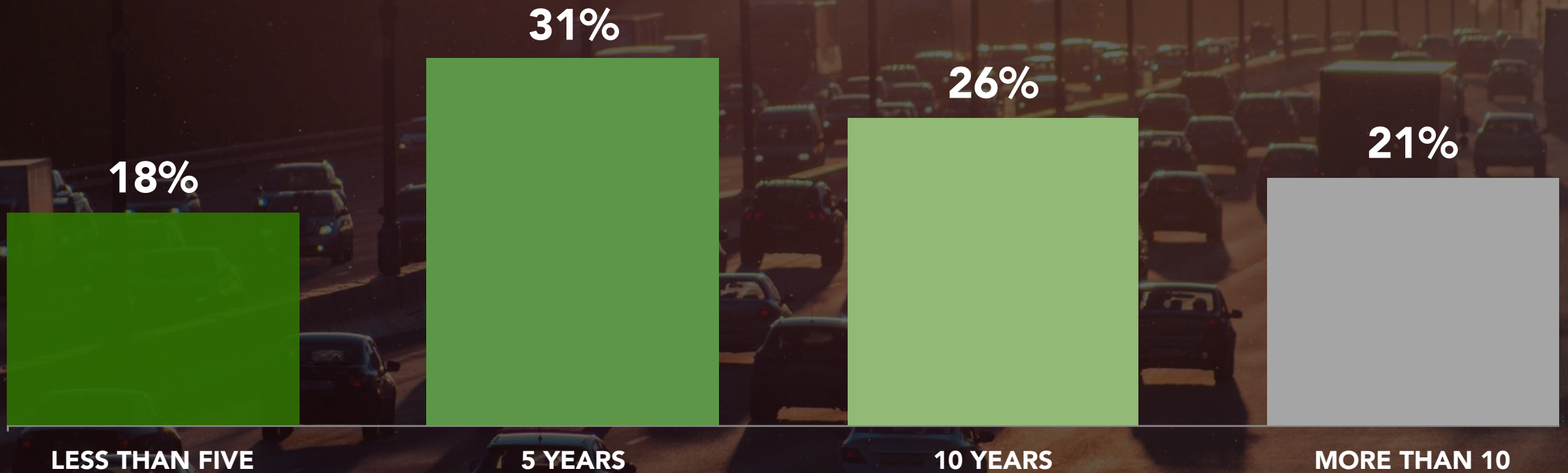
HOW MANY YEARS WILL IT TAKE FOR E-VEHICLES TO BECOME THE MAJORITY?



HOW MANY YEARS WILL IT TAKE FOR E-VEHICLES TO BECOME THE MAJORITY?



WHEN IS THE IDEAL TIME FOR E-CARS TO BECOME THE MAJORITY TO BECOME THE MAJORITY?



AGAIN, IF IT WERE UP TO YOU, HOW MANY YEARS FROM NOW WOULD BE THE RIGHT TIME FOR ELECTRIC VEHICLES TO BECOME THE MAJORITY OF CONSUMER VEHICLES SOLD?

IF BUYING A CAR WHAT WOULD YOU DO?



CERTAIN TO BUY E

VERY LIKELY E

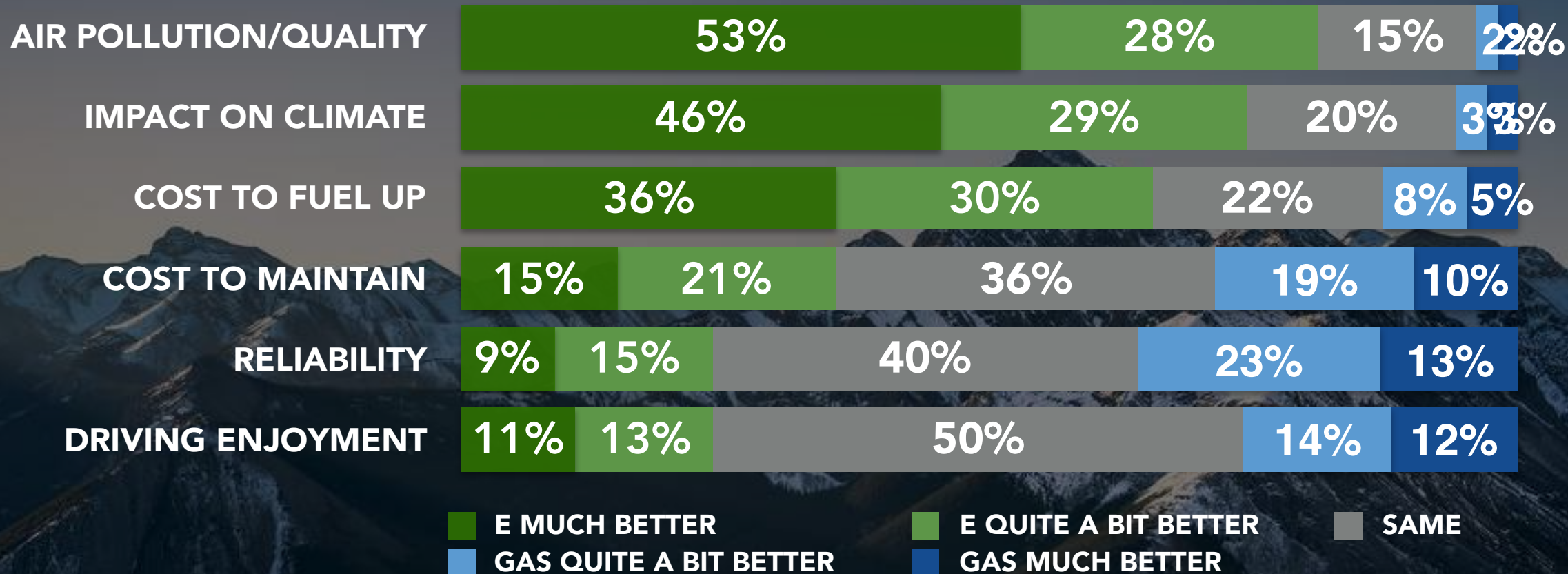
INCLINED E BUT WOULD COMPARE

INCLINED GAS WOULD COMPARE

VERY LIKELY GAS

CERTAIN TO BUY GAS

HOW DO ELECTRIC AND GAS VEHICLES COMPARE



COMPARING ELECTRIC VEHICLES TO GAS VEHICLES HOW DO YOU FEEL THEY COMPARE ON EACH OF THE FOLLOWING CRITERIA?

FACTORS THAT COULD HELP YOU DECIDE TO BUY ELECTRIC

KNOWING THERE ARE ENOUGH CHARGING STATIONS

45%

30%

25%

KNOWING THE TIME TO RECHARGE WAS QUICK

38%

37%

25%

BATTERY IMPROVEMENTS WERE INCREASING RANGE FOR ELECTRIC

38%

36%

26%

KNOWING MAINTENANCE COSTS ARE MUCH LOWER FOR ELECTRIC

36%

37%

27%

KNOWING IT COSTS 4-5 TIMES AS MUCH TO FUEL A GAS VEHICLE

34%

40%

26%

TAX INCENTIVES TO EQUALIZE PRICE WITH GAS CARS

32%

38%

30%

REALLY IMPORTANT

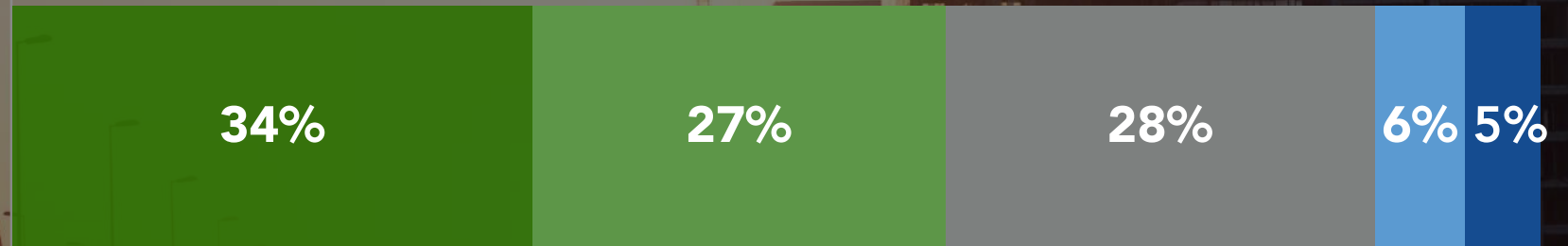
IMPORTANT

NOT IMPORTANT

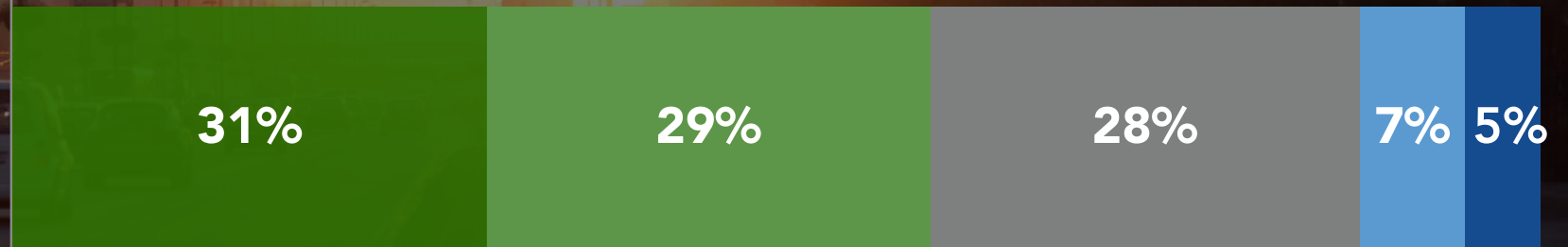
HOW MUCH WOULD EACH OF THE FOLLOWING CONTRIBUTE TO YOU DECIDING TO GET AN ELECTRIC VEHICLE AT SOME POINT IN THE FUTURE?

REACTIONS TO GOVERNMENT POLICY INITIATIVES

OFFERING REBATES OR PURCHASE INCENTIVES TO ENCOURAGE PURCHASES OF ELECTRIC VEHICLES?

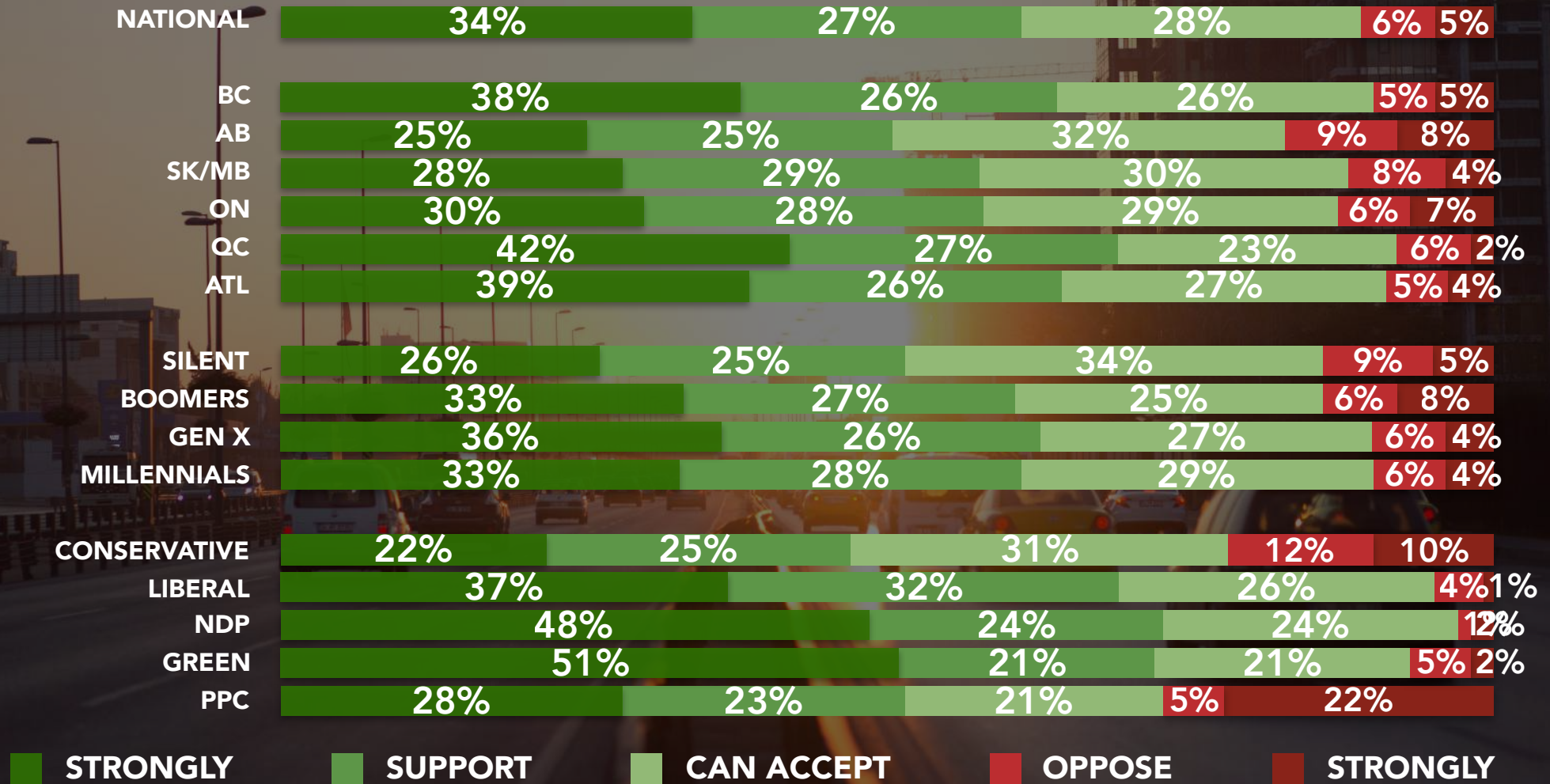


INVESTING MONEY IN ELECTRIC CAR RECHARGING INFRASTRUCTURE?



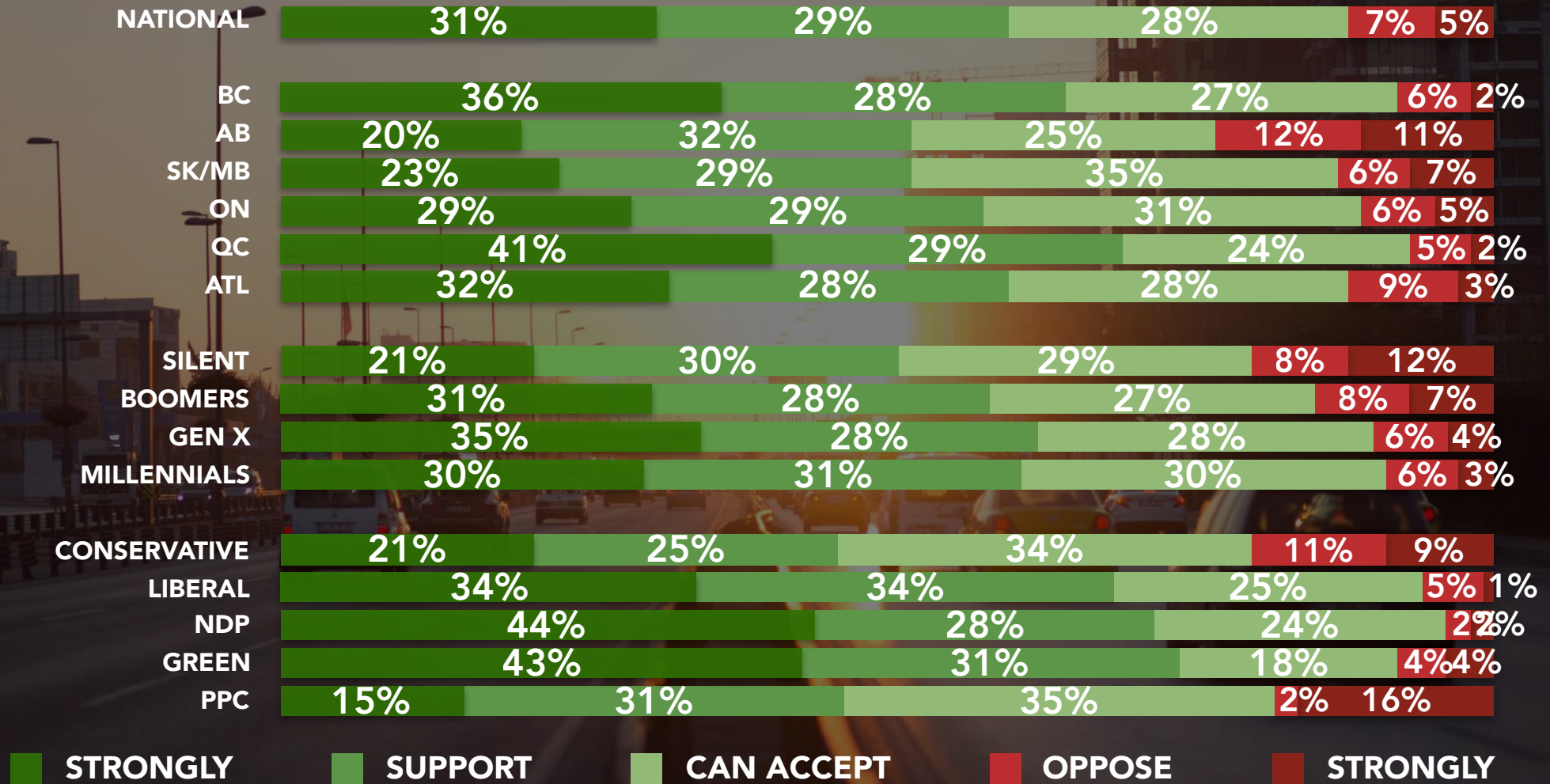
■ STRONGLY SUPPORT ■ SUPPORT ■ CAN ACCEPT ■ OPPOSE ■ STRONGLY OPPOSE

OFFERING REBATES OR PURCHASE INCENTIVES TO ENCOURAGE PURCHASES OF ELECTRIC VEHICLES



DO YOU STRONGLY SUPPORT, SUPPORT, CAN ACCEPT, OPPOSE OR STRONGLY OPPOSE GOVERNMENTS ...?

INVESTING MONEY IN ELECTRIC CAR INFRASTRUCTURE



DO YOU STRONGLY SUPPORT, SUPPORT, CAN ACCEPT, OPPOSE OR STRONGLY OPPOSE GOVERNMENTS ...?