abacus data

Perceptions of Clean Technologies Among Residents of the GTHA and Vancouver

Clean Energy Canada

Segmentation Analysis

March 2025

Methodology

- Sample size: 3,000 adult Canadians living in GTHA and Metro Vancouver.
- Margin of error: +/- 1.79%, 19 times out of 20.
- Survey field dates: November 12, 2024 to January 21, 2025.
- The data was weighted by age, gender, education and region.
- Totals may not add up to 100 due to rounding.
- Throughout the report % indicates a significantly higher proportion than the % in the same segment.

Who are your segments?

SEGMENTS

APPROACH TO SEGMENTATION

Segments were created using Latent Class Analysis (LCA), which grouped individuals based on shared characteristics across variables like gender, age, education, carbon footprint motivation, EV ownership, intent to purchase an EV or gas vehicle, importance of an energy-smart home, residence type, children, income, and birthplace. This approach identified distinct segments based on attitudes, behaviors, and demographics, offering insights into motivations for adopting clean technologies.

NET-ZERO DADS (AND MOMS)

14%

GENERATION GREEN

19%

RETIRED HOMEOWNERS

30%

PRACTICAL FAMILIES

15%

FRUGAL SKEPTICS

22%

SEGMENTS

NET-ZERO DADS (AND MOMS)

- Named after a term coined by *The Economist*, Net-Zero Dads make up 61% of this segment, with Moms at 39%.
- Very motivated to lower their carbon footprint and adopt clean technologies
- Younger urban parents with kids in the house
- Higher incomes, usually university-educated
- Typically work full-time jobs, and most commute by car
- Half of them already own an EV, while the rest are inclined to get one

GREEN GENERATION

- Very motivated to lower their carbon footprint and adopt clean technologies
- Younger, childless, and more often unmarried
- More likely to take transit, bike, or walk to work
- Only 25% currently own an EV, but three-quarters know someone who does
- Almost all of them are inclined to get an EV

RETIRED HOMEOWNERS

- Moderately motivated to lower their carbon footprint and adopt clean technologies
- Older, generally retired empty nesters
- Typically own their homes, often with no mortgage
- More likely to have technological concerns, like assumed electrical upgrades
- Only one in 20 currently have an EV, while about half are inclined to get one

PRACTICAL FAMILIES

- Moderately motivated to lower their carbon footprint and adopt clean technologies
- Younger parents with kids in the house, split between suburban and urban living
- Middle-class earners, most with a college or high school education
- Only one in 10 currently have an EV, while about half are inclined to get one
- Homeownership is split between a mix of homeowners in single-detached or row homes and renters, with many living in condos or apartments.

FRUGAL SKEPTICS

- Mostly unmotivated to lower their carbon footprint and adopt clean technologies
- Generally single and childless, but evenly split across age groups and gender
- Typically have a high school education or less with a lower income
- Most rent or live with family
- None of them own an EV, while only one in five are inclined to get one

Segment Profiles

NET-ZERO DADS (AND MOMS)

NET-ZERO DADS (AND MOMS) | 14%

Net Zero Dads (and Moms) are highly motivated to adopt clean technologies, driven by a commitment to sustainability and a fascination with new technology. Typically, homeowners with higher-than-average incomes, they are well-positioned to make home upgrades that align with their values and offer long-term financial benefits. This segment is predominantly urban, with a strong family focus, and they value the comfort, efficiency, and long-term financial savings of sustainable home solutions. While they are already on the path to adopting technologies like electric vehicles (EVs) and smart home systems, many lack detailed knowledge about the finer aspects of these technologies. However, when presented with the right information, their likelihood of adoption increases significantly, especially in areas like EVs and heat pumps.

DEMOGRAPHICS

GENDER

Male
61%

Female
39%

AGE

18 – 29: **23%**

30 – 44: **50%**

FAMILY STATUS

Married
74%

Children
Under 12: 71%
12-17: 42%

HOME OWNERSHIP

Own w/ mortgage
56%

Single detached
58%

HOUSEHOLD INCOME

$75k-$100k: **30%**

$100k+: **43%**

EMPLOYMENT

Work full-time
73%

Commute
69% drive

EDUCATION

University
69%

LOCATION

Urban
73%

NET-ZERO DADS (AND MOMS) | 14%

PERSONAL ACTION

REDUCE CARBON FOOTPRINT

89%
Motivated to do so

VEHICLE OWNERSHIP

Own an EV 50%
Know someone who does 88%

NEXT VEHICLE PURCHASE

100%
Inclined to purchase an EV

ENERGY SMART HOME

94%
Important that next home is energy smart

HEAT PUMP INTEREST

73%
Have or want one / have positive impression of them

KEY DEFINING ELEMENTS

Energy Smart Home Priorities: The main drivers for adopting energy-smart technologies are reducing monthly bills (52%) and enhancing comfort (48%).

Knowledge Growth Leads to Higher Adoption: Despite being highly motivated, many in this group were initially unaware of several benefits of clean technologies. For example, 81% became more likely to purchase an EV after learning that it's significantly cheaper over its lifetime than gas vehicles. Similarly, 77% were more likely to adopt heat pumps after understanding their energy efficiency and functionality.

Barriers and Incentives: Cost concerns remain the largest barrier, particularly with perceived battery replacement costs (37%) and initial vehicle costs (35%). However, they are willing to pay significantly more for EVs, with 53% willing to spend $50k+. Government rebates are a key motivator for overcoming cost barriers (36% for heat pumps, 82% for EVs in BC).

Economic Views: Although the segment is less concerned with the rising cost of living (50%) compared to others, they are still very interested in long-term cost savings from clean technologies, such as EVs and energy-efficient homes.

INFORMATION SOURCES AND INFLUENCE

INFORMATION ABOUT EVS & ENERGY-EFFICIENT HOME IMPROVEMENTS

55%
SOCIAL MEDIA

56%
FAMILY & FRIENDS

MOST INFLUENTIAL INFORMATION SOURCES WHEN CONSIDERING HOME UPGRADES

47%
FRIENDS & FAMILY

38%
SOCIAL MEDIA

36%
SEARCH ENGINE RESULTS

NET-ZERO DADS (AND MOMS) | 14%

KEY BARRIERS

Cost Concerns: The primary barrier is the initial cost of clean technologies, especially EVs and heat pumps. Despite their willingness to adopt, 37% are concerned about perceived battery replacement costs, and 35% worry about the initial cost of EVs. Despite this, they are willing to pay a premium for these technologies (53% would spend $50k+ for an EV), but the high upfront cost remains a potential barrier to overcome.

Charging Infrastructure: While 25% of the segment express concerns about access to charging stations, many are uncertain about the adequacy of public fast-chargers in their neighborhoods. With that, 28% are particularly concerned about making electrical upgrades in their homes, which could limit the installation of EV chargers.

Lack of Detailed Knowledge: Although this segment is highly motivated to adopt clean technologies, there is still a gap in their knowledge about specific benefits. For instance, 46% were unaware that EVs, when charged with clean electricity, are 90% cleaner than gas vehicles. Providing clear and educational content about long-term cost savings and environmental benefits will help overcome knowledge gaps.

Homeownership and Upgrades: While 56% of this group are homeowners, the status of renters could still be a barrier to adopting home-based technologies such as heat pumps. Renters often face limitations in making significant upgrades, which could slow down their transition to more sustainable home solutions.

Information Accessibility and Trust: Although this group is generally well-educated, they rely heavily on sources such as social media (55%) and friends and family (56%) for information. To facilitate adoption, information about clean technologies needs to be easily accessible, engaging, and come from sources they trust.

PERCEIVED BARRIERS

INITIAL COST OF EVs

35%
EVs are too expensive

ACCESS TO CHARGING

41%
Concerned about access

ELECTRICAL UPGRADES FOR EVs

31%
Concerned with upgrades needed

INITIAL COST OF HEAT PUMPS

34%
Concerned with upfront costs

GENERATION GREEN

GENERATION GREEN | 19%

Generation Green is a group of environmentally conscious, tech-savvy individuals who are highly motivated to reduce their carbon footprint and adopt clean technologies. Generally under 40 and childless, they are open to new technology and seek to align their purchases with their sustainability values. While they are highly motivated to adopt clean technologies, they also lack detailed knowledge about their specific benefits. They are eager to embrace clean energy solutions like electric vehicles (EVs) and smart homes but tend to have limited awareness of the finer details of how these technologies work. When provided with the right information, especially information that highlights the environmental and financial advantages of these technologies, their likelihood of adoption increases significantly. Generation Green is more likely than Net-Zero Dads (and Moms) to live in condos or rent, which may present more barriers to home upgrades. Despite these barriers, they are driven by a strong desire for sustainability and are motivated by the potential long-term cost savings clean technologies offer.

DEMOGRAPHICS

GENDER

Male **61%**

Female **39%**

AGE

18 – 29: **45%**

30 – 44: **26%**

FAMILY STATUS

Single **55%**

No children **100%**

HOME OWNERSHIP

Rent **44%**

Condo / Apartment **34%**

HOUSEHOLD INCOME

< $50k: **34%**

$100k+: **26%**

EMPLOYMENT

Work full-time **46%**

Commute **37%** **public transit**

EDUCATION

University: **41%**

College: **37%**

LOCATION

Urban **63%**

GENERATION GREEN | 19%

PERSONAL ACTION

REDUCE CARBON FOOTPRINT

69%
Motivated to do so

VEHICLE OWNERSHIP

Own an EV 25%
Know someone who does 76%

NEXT VEHICLE PURCHASE

96%
Inclined to purchase an EV

ENERGY SMART HOME

80%
Important that next home is energy smart

HEAT PUMP INTEREST

66%
Have or want one / have positive impression of them

KEY DEFINING ELEMENTS

Energy Smart Home Priorities: Reducing monthly bills (59%) and creating a comfortable living environment (48%) are key motivators for adopting clean home technologies such as smart thermostats and heat pumps.

Awareness and Knowledge Gaps: Despite their interest in clean technologies, this segment has notable knowledge gaps, partly due to limited homeownership experience. For instance, 53% were unaware that EVs are 90% cleaner when charged with clean electricity, but 70% said this would increase their likelihood to buy one. Similarly, 55% didn't know heat pumps could be installed in all types of homes

Barriers to Adoption: The main barrier for Generation Green is the cost EVs (43%) and heat pumps (34%), along with concerns about perceived battery replacement (38%). Their status as renters also limits their ability to make home upgrades. Despite these challenges, they remain highly motivated to adopt if costs are made more accessible through incentives like government rebates (42% for heat pumps, 60% for EVs in BC).

Financial Considerations: Despite their income diversity, cost remains a significant consideration, especially for those in the lower-income bracket, indicating that price and rebates play a critical role in adoption.

Government Support and Clean Technology Adoption: 84% of the segment believes the government should make clean technologies more accessible through incentives, with 66% favoring federal government responsibility. Their support for government action indicates they are open to policies that facilitate the adoption of clean technologies.

INFORMATION SOURCES AND INFLUENCE

INFORMATION ABOUT EVS & ENERGY-EFFICIENT HOME IMPROVEMENTS

47%
SOCIAL MEDIA

47%
FAMILY & FRIENDS

MOST INFLUENTIAL INFORMATION SOURCES WHEN CONSIDERING HOME UPGRADES

44%
SEARCH ENGINE RESULTS

42%
FRIENDS & FAMILY

33%
SOCIAL MEDIA

GENERATION GREEN | 19%

KEY BARRIERS

Cost of Clean Technologies: The primary barrier for Generation Green is the cost of clean technologies like EVs and heat pumps. While 26% of this segment earns over $100k, 34% earn under $50k, creating a significant income disparity. The initial costs of these technologies, as well as perceived EV battery replacement costs, present a barrier, especially for those in the lower-income bracket. Financial incentives like rebates are crucial for making them more affordable.

Renting Status and Housing Limitations: Generation Green is more likely to be a renter with 44% renting. Renting presents practical barriers for adopting home-based technologies like heat pumps, smart thermostats, and EV charging stations. Renters may lack the ability to make upgrades or install technologies that require significant changes to the property.

Lack of Detailed Knowledge: Despite being motivated, Generation Green has knowledge gaps regarding the specific benefits of clean technologies. For instance, 53% were unaware that EVs, when charged with clean electricity, are 90% cleaner than gas vehicles. Once educated, however, interest in clean technology increases, highlighting the need for clear, simple information that emphasizes both the environmental and financial benefits.

Access to Charging Infrastructure: While this segment is inclined to purchase an EV, 25% are concerned about access to charging stations. In addition, 44% of this segment are renters who may have difficulty accessing charging infrastructure for EVs, as they often do not have driveways or garage spaces to install charging equipment.

Uncertainty about Long-Term Financial Benefits: Although Generation Green is motivated by cost savings and long-term financial benefits, some are still uncertain about the actual financial impact of clean technologies. For example, many believe that heat pumps and EVs will help reduce bills over time, but there may be skepticism about total ownership costs, including installation and maintenance. Clear communication regarding the total cost of ownership, including savings on energy bills and fuel costs, could help mitigate this barrier.

PERCEIVED BARRIERS

FINANCIAL CONSTRAINTS

34%
Household income < $50k

LIMITATIONS DUE TO RENTING

44%
Are renters

ACCESS TO CHARGING

33%
Concerned about access

ELECTRICAL UPGRADES FOR HEAT PUMP

36%
Cannot afford / make electrical upgrades

RETIRED HOMEOWNERS

RETIRED HOMEOWNERS | 30%

Retired Homeowners are older adults, typically empty nesters, who prioritize comfort, simplicity, and cost-savings over technological innovation. While they are moderately interested in clean technologies, especially those that offer immediate financial benefits, they are cautious about adopting new systems without clear, practical reasons. Many are already retired or close to retirement, with children grown and living independently, making them less likely to be early adopters of new technologies. Instead, they prefer to make purchases that align with their needs for comfort, practicality, and reduced costs. Retired Homeowners are particularly motivated by rebates and cost-saving opportunities but concerns about costs – such as perceived costs for a battery replacement for electric vehicles (EVs) and installation costs for heat pumps – remain significant barriers. They are more likely to own their homes, many with no mortgage, putting them in a position to make upgrades, but they often seek simple, reliable information and financial incentives to ease the process. Overcoming financial hurdles and providing straightforward, functional details about how clean technologies improve their quality of life without overwhelming them with complexity would significantly impact their adoption of these solutions.

DEMOGRAPHICS

GENDER

Male **42%**

Female **58%**

AGE

45 – 59: **29%**

60+: **68%**

FAMILY STATUS

Married **59%**

Children 18+ **100%**

HOME OWNERSHIP

Own w/ no mortgage **38%**

Single detached **51%**

HOUSEHOLD INCOME

< $50k: **29%**

$100k+: **31%**

EMPLOYMENT

Retired **45%**

No Commute **46%**

EDUCATION

HS or less: **30%**

College: **47%**

LOCATION

Suburban **50%**

RETIRED HOMEOWNERS | 30%

PERSONAL ACTION

REDUCE CARBON FOOTPRINT

45%
Motivated to do so

VEHICLE OWNERSHIP

Own an EV	6%
Know someone who does	54%

NEXT VEHICLE PURCHASE

51%
Inclined to purchase an EV

ENERGY SMART HOME

56%
Important that next home is energy smart

HEAT PUMP INTEREST

57%
Have or want one / have positive impression of them

KEY DEFINING ELEMENTS

Moderate Environmental Motivation: 45% are motivated to take personal action to reduce their carbon footprint, with an additional 26% moderately motivated. While they care about the environment, their decisions are more pragmatic and influenced by personal benefits such as cost savings rather than a strong environmental drive.

EV Ownership and Future Intent: While 51% are inclined to purchase an EV for their next vehicle, the segment remains divided, with 49% still leaning towards a gas vehicle. The primary barriers to EV adoption include cost (69%), perceived battery replacement costs (67%), and concerns about home electrical upgrades (54%).

Home Energy Preferences: Only 56% find it important that their next home is energy smart, indicating less urgency for advanced home technologies. However, they are still open to adopting energy-efficient solutions, especially if they contribute to cost savings (75%) and comfort (51%).

Barriers to Technology Adoption: Cost concerns are significant, with 47% citing the high installation costs of heat pumps and the need for electrical upgrades as key barriers. They are also anxious about the complexities involved in adopting new technologies, and government rebates (37%) would help overcome these barriers.

Interest in Financial Incentives: They are highly motivated by cost savings (74%) and government incentives (81%) to make clean technologies more affordable. This makes rebates and tax incentives important in overcoming financial hurdles to adoption.

INFORMATION SOURCES AND INFLUENCE

INFORMATION ABOUT EVS & ENERGY-EFFICIENT HOME IMPROVEMENTS

53%
NEWS OUTLETS

49%
FAMILY & FRIENDS

MOST INFLUENTIAL INFORMATION SOURCES WHEN CONSIDERING HOME UPGRADES

57%
FRIENDS & FAMILY

46%
SEARCH ENGINE RESULTS

38%
CONTRACTORS

RETIRED HOMEOWNERS | 30%

KEY BARRIERS

Cost Concerns: The primary barrier for Retired Homeowners is the initial cost of clean technologies (e.g., 69% cite cost as the main barrier to adopting EVs). Similarly, the high installation costs for heat pumps are a significant challenge, with 47% highlighting them as a key obstacle. Although many are in a position to make upgrades, the financial burden of these technologies remains a key challenge.

Home Electrical Upgrades: Many Retired Homeowners are concerned about the need for electrical upgrades to install EV chargers or heat pumps, which could add additional costs or complexity to the adoption of clean technologies. This concern about the technical feasibility of installing new systems is a practical barrier, particularly for older adults who prioritize simplicity and comfort.

Knowledge Gaps: Despite being moderately motivated to adopt clean technologies, Retired Homeowners have a lower level of awareness about their benefits. For instance, 57% were unaware that EVs have a smaller carbon footprint than gas cars, and 61% were unaware that heat pumps are 2 to 5 times more efficient than gas furnaces. As this segment is open to learning, providing them with simplified, trustworthy information is crucial for overcoming knowledge gaps.

Skepticism About Technological Adoption: Retired Homeowners tend to be cautious about adopting new technologies. While many are interested in clean technologies, they need clear, simple, practical reasons to adopt. Their focus is primarily on comfort and cost savings, rather than on innovation. This cautious approach means they may be less likely to make investments in energy-smart home technologies unless there is a tangible financial benefit.

Limited Trust in New Technology: This group tends to rely on trusted sources like news outlets (53%) and friends and family (49%) for information about new technologies. Their decision-making is influenced more by familiar, reliable sources than by social media. Consequently, to encourage adoption, communication about clean technologies needs to be straightforward, trusted, and relevant to their daily needs.

PERCEIVED BARRIERS

INITIAL COST OF EVs

69%
EVs are too expensive

LACK AWARENESS OF EV BENEFITS

Many are unaware of the tangible benefits of EVs

ELECTRICAL UPGRADES FOR EVs

40%
Cannot afford / make electrical upgrades

ELECTRICAL UPGRADES FOR HEAT PUMP

36%
Cannot afford / make electrical upgrades

PRATICAL FAMILIES

PRACTICAL FAMILIES | 15%

Practical Families are a family-oriented group, moderately motivated to reduce their carbon footprint with a strong focus on long-term financial savings and family well-being. They are typically urban dwellers with children, balancing a commitment to sustainability with practical concerns like cost, comfort, and the future of their children. Unlike other segments in similar life stages, such as Net-Zero Dads (and Moms), Practical Families are less white-collar, with a focus on finding cost-effective solutions that meet both environmental and practical needs. While they are open to clean technologies like electric vehicles (EVs) and energy-efficient homes, they need clear evidence of the long-term benefits and financial incentives before fully embracing them. Practical Families place high importance on reducing their carbon footprint but are cautious about new technologies without clear, reliable benefits. They are particularly influenced by trusted sources like friends and family and are motivated by government incentives that can ease the financial burden of adopting clean energy solutions. Despite mixed opinions on EVs, they are actively exploring options that align with their financial and family priorities, guided by a blend of personal motivation and a desire for sustainable living.

DEMOGRAPHICS

GENDER

Male **43%**

Female **57%**

AGE

30 – 44: **51%**

45 – 59: **33%**

FAMILY STATUS

Married **61%**

Children
Under 12: 72%
12-17: 49%

HOME OWNERSHIP

Rent **53%**

Single detached **39%**

HOUSEHOLD INCOME

< $50k: **40%**

$100k+: **21%**

EMPLOYMENT

Work full-time **52%**

Commute **50% drive**

EDUCATION

HS or less: **30%**

College: **44%**

LOCATION

Urban **56%**

PRACTICAL FAMILIES | 15%

PERSONAL ACTION

REDUCE CARBON FOOTPRINT

23%
Motivated to do so

VEHICLE OWNERSHIP

Own an EV	9%
Know someone who does	55%

NEXT VEHICLE PURCHASE

48%
Inclined to purchase an EV

ENERGY SMART HOME

48%
Important that next home is energy smart

HEAT PUMP INTEREST

60%
Have or want one / have positive impression of them

KEY DEFINING ELEMENTS

Motivation to Reduce Carbon Footprint: The segment is moderately motivated (23%) to take personal action towards reducing their carbon footprint, while only 8% are highly motivated. This indicates a more balanced, cautious approach to adopting clean energy technologies.

Current Energy and Vehicle Choices: 91% do not currently own an EV, with intentions for their next vehicle split almost evenly (48% for EVs and 52% for gas vehicles), reflecting mixed views influenced by environmental and financial factors. Cost and perceived battery replacement costs are significant barriers, with a preference for affordable EV options.

Home Energy Preferences: The main driver for energy smart homes is reducing monthly energy bills (57%), which is a significant motivation for adopting energy-efficient technologies. Only 15% would like to get a heat pump immediately, but after being informed about the benefits, interest increases to 31%. Barriers such as cost and electrical upgrades play a large role in limiting adoption.

Financial Concerns: Cost Sensitivity: 52% cite the cost of EVs as a major barrier, and many are concerned about the cost of heat pumps and electrical upgrades. Additionally, they express concern about rising living costs and housing affordability (63% and 42%, respectively).

Government and Rebates: The segment expresses moderate support for government incentives to make clean technologies more accessible (73%), showing a preference for policies that reduce financial barriers, such as rebates and zero-interest loans.

INFORMATION SOURCES AND INFLUENCE

INFORMATION ABOUT EVS & ENERGY-EFFICIENT HOME IMPROVEMENTS

53%
SOCIAL MEDIA

56%
FAMILY & FRIENDS

MOST INFLUENTIAL INFORMATION SOURCES WHEN CONSIDERING HOME UPGRADES

58%
FRIENDS & FAMILY

41%
SEARCH ENGINE RESULTS

32%
SOCIAL MEDIA

PRACTICAL FAMILIES | 15%

KEY BARRIERS

Cost Concerns: The primary barrier for Practical Families is the cost of clean technologies like EVs and heat pumps – 52% of the group identify cost as a major barrier to adoption. While they show interest in energy-smart technologies, concerns about perceived battery replacement costs and installation costs for heat pumps and other upgrades present significant hurdles. This segment is highly cost-sensitive making financial incentives a crucial factor.

Renting and Housing Limitations: While 29% of Practical Families are homeowners (with a mortgage), 53% are renters, many living in condos or apartments. This significantly limits their ability to make home upgrades like installing EV charging stations or heat pumps. Renting status is a practical barrier, as renters may lack the authority to modify their homes to accommodate clean technologies.

Knowledge Gaps and Uncertainty: Despite their interest, Practical Families show notable knowledge gaps. For example, 62% are unaware that EVs are significantly cleaner when charged with clean electricity. Similarly, they are also unaware of the benefits of heat pumps and their energy efficiency. Once informed, 54% are more likely to consider adopting heat pumps. Therefore, providing clear, accessible information on how these technologies lead to long-term savings and environmental benefits could help increase willingness to adopt.

Mixed Opinions on EVs: This group has mixed views on EVs, with 52% intending to purchase a gas vehicle over an EV. While 48% are considering EVs, the upfront cost and perceived battery replacement cost concerns remain significant obstacles. They need financial incentives, such as rebates, to make EVs more accessible and affordable.

Limited Adoption of Energy-Smart Homes: Although 48% of this group finds an energy-smart home important, the initial cost of making a home energy-smart remains a barrier. This is compounded by the concerns over electrical upgrades and installation costs. 57% are motivated by the idea of reducing their monthly energy bills, but many require clearer pathways and/or financial incentives to upgrade their homes without substantial financial risk.

PERCEIVED BARRIERS

INITIAL COST OF EVs

52%
EVs are too expensive

FINANCIAL CONSTRAINTS

40%
Household income < $50k

LIMITATIONS DUE TO RENTING

43%
Are renters

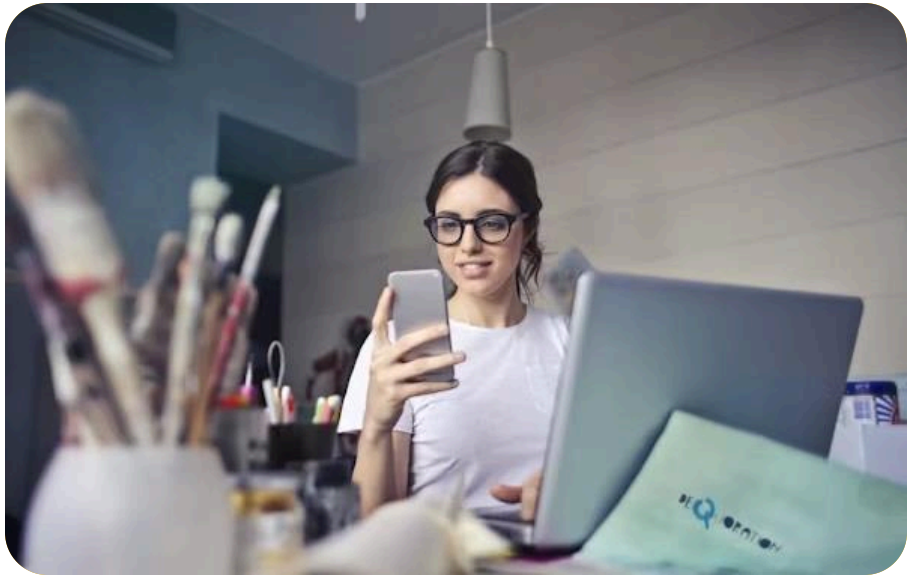
ELECTRICAL UPGRADES FOR HEAT PUMP

36%
Cannot afford / make electrical upgrades

FRUGAL SKEPTICS

FRUGAL SKEPTICS | 22%

Frugal Skeptics are a cost-focused group primarily concerned with affordability and practicality. With lower incomes and fewer educational opportunities, they are less motivated by environmental concerns and more focused on their day-to-day financial challenges. Frugal Skeptics are largely uninformed about clean energy solutions, with a strong preference for familiar options with lower upfront costs, like used gas vehicles. They are skeptical about the effectiveness of clean technologies, particularly if the upfront costs are too high, and they see no immediate need to adopt these technologies unless they directly benefit their bottom line. While some may show a mild interest in potential cost savings, they are primarily influenced by trusted sources such as friends, family, and search engine results when making decisions about purchases or home upgrades. Even when provided with information, their inclination to act on it remains low. For Frugal Skeptics, the key motivator is cost savings, but they need clear, straightforward information that demonstrates the immediate financial savings clean technologies can provide, alongside incentives and solutions aimed at renters.



DEMOGRAPHICS

GENDER

Male **49%**

Female **51%**

AGE

18 – 29: **25%**

45 – 59: **25%**

60+: **29%**

FAMILY STATUS

Single **51%**

No children **100%**

HOME OWNERSHIP

Rent **51%**

Condo / apartment **42%**

HOUSEHOLD INCOME

< $50k: **49%**

$50k-$75k: **17%**

EMPLOYMENT

Work full-time **29%**

No Commute **32%**

EDUCATION

High school or less **57%**

LOCATION

Urban **50%**

FRUGAL SKEPTICS | 22%

PERSONAL ACTION

REDUCE CARBON FOOTPRINT

14%
Motivated to do so

VEHICLE OWNERSHIP

Own an EV	0%
Know someone who does	35%

NEXT VEHICLE PURCHASE

18%
Inclined to purchase an EV

ENERGY SMART HOME

22%
Important that next home is energy smart

HEAT PUMP INTEREST

38%
Have or want one / have positive impression of them

KEY DEFINING ELEMENTS

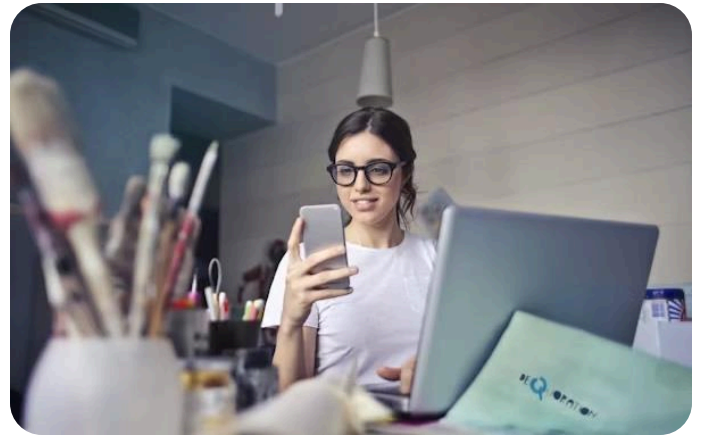
Home Energy Smart Preferences: 44% of this group does not find it important for their next home to be energy smart, with only 35% considering it somewhat important. This indicates minimal interest in energy-efficient home upgrades or technologies, focusing instead on practicality.

Cost Barriers and Skepticism: This segment faces multiple barriers to adopting clean technologies, including cost (66%), perceived battery replacement costs (60%), and concerns about electrical upgrades (56%). Many perceive gas vehicles as cheaper overall (65%). They are also doubtful about the benefits of clean technologies, with many unconvinced that EVs can save them money over time.

Awareness and Impact of Information: This segment has low awareness of the benefits of EVs and heat pumps. 76% were unaware that EVs are cleaner with 100% clean electricity, and 65% didn't know heat pumps function as both heating and cooling systems. While some are mildly influenced by new info (32% more likely to buy an EV), 68% would still choose a gas vehicle after receiving detailed information.

Barriers to EV and Heat Pump Adoption: Range concerns (49%) and doubts about public EV charging efficiency (43%) are significant barriers. They also face practical obstacles, such as not having a driveway or reliable place to charge an EV (48%) and renting (42%), which makes adoption of technologies like heat pumps or EVs more complicated.

Low Interest in Home Upgrades: Only 37% would consider adopting a smart thermostat (a relatively low-barrier upgrade), and even fewer are interested in technologies like heat pumps (30%), home energy management systems (26%), or rooftop solar panels (25%). Cost savings are the primary motivator (69%), but comfort and convenience rank second.



INFORMATION SOURCES AND INFLUENCE

INFORMATION ABOUT EVS & ENERGY-EFFICIENT HOME IMPROVEMENTS

39%
SOCIAL MEDIA

33%
NEWS OUTLETS

MOST INFLUENTIAL INFORMATION SOURCES WHEN CONSIDERING HOME UPGRADES

46%
FRIENDS & FAMILY

42%
SEARCH ENGINE RESULTS

29%
VIDEOS OR TUTORIALS

FRUGAL SKEPTICS | 22%

KEY BARRIERS

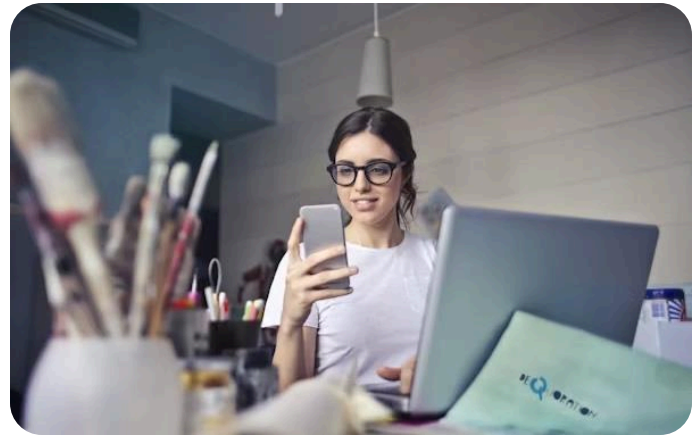
Cost Concerns: The cost of clean technologies is a major barrier, with 66% concerned about the upfront costs of EVs and heat pumps. They are also skeptical about long-term financial savings, with 71% being unaware the EVs will be cheaper than gas vehicles over the lifetime of the car. The segment is particularly cost-sensitive and prefers familiar, lower-cost options, such as used gas vehicles.

Renting Status and Housing Limitations: With 51% of the group renting, Frugal Skeptics face challenges in adopting home-based technologies like heat pumps and EV chargers. As renters, they may lack the ability to install these technologies, creating a practical barrier. Renters face difficulties in making the necessary upgrades, with 48% of this segment lacking a driveway or garage to install EV charging stations.

Skepticism and Lack of Information: This group is largely uninformed about clean-energy technologies, with 76% unaware that EVs are cleaner when charged with 100% clean electricity, and 65% unaware that heat pumps function as both heating and air conditioning systems. Although they are mildly influenced by new information, 68% would still choose a gas vehicle after receiving detailed information about EVs.

Low Interest in Energy-Smart Homes: Frugal Skeptics show low interest in adopting energy-smart home technologies, with 44% not finding it important for their next home to be energy smart. The cost of such upgrades remains a key barrier, and 57% prioritize cost savings over other benefits like comfort or convenience. Only 37% would adopt a smart thermostat, and even fewer would consider heat pumps or solar panels. They are more likely to adopt technologies that are affordable and practical, rather than advanced energy-efficient solutions.

Financial Constraints: Frugal Skeptics have a lower household income (49% earning less than $50k annually), which makes them more hesitant to invest in clean technologies. Even though they are open to cost savings, they are reluctant to spend on high-upfront-cost solutions, which contributes to their reluctance to adopt EVs and heat pumps without clear financial incentives or immediate savings.



PERCEIVED BARRIERS

INITIAL COST OF EVS

66%
EVs are too expensive

LIMITATIONS DUE TO RENTING

51%
Are renters

COST SAVINGS

69%
Prioritize cost savings

LACK AWARENESS OF BENEFITS

Many are unaware of the benefits of clean energy tech

Knowledge and Personal Action

In general, are you personally motivated to take actions that lower your carbon footprint in the context of climate change? For example: driving an EV, taking transit, flying less, eating less meat, recycling, voting for a certain party, etc.

PERSONAL MOTIVATION TO LOWER CARBON FOOTPRINT IN THE CONTEXT OF CLIMATE CHANGE

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
NET: Very motivated + Motivated	46%	89%	69%	23%	45%	14%
Very motivated	15%	33%	23%	8%	15%	3%
Motivated	30%	56%	46%	16%	30%	11%
Moderately motivated	26%	10%	25%	46%	26%	27%
NET: Somewhat motivated + Not at all motivated	28%	1%	6%	31%	29%	59%
Somewhat motivated	15%	1%	4%	18%	18%	28%
Not at all motivated	13%	1%	3%	12%	11%	31%

Base n = 3000

On average, which household do you think pays a smaller monthly energy bill?

HOUSEHOLD ENERGY BILLS: WHICH PAYS A SMALLER MONTHLY COST ON AVERAGE?

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
A household with an electric vehicle, a heat pump (which both heats and cools), and other clean energy technologies	57%	63%	60%	47%	65%	46%
A household with a gas vehicle, natural gas heating, air conditioning, and other fossil fuel or traditional technologies	43%	37%	40%	53%	35%	54%

Base n = 3000

Now, when thinking about 10 years from now, which household do you think will have spent less overall after a decade of ownership? This includes both the purchase price of the technology as well as monthly bills incurred over 10 years.

LONG-TERM OWNERSHIP COSTS: WHICH HOUSEHOLD WILL SPEND LESS OVER THE NEXT DECADE?

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
A household with an electric vehicle, a heat pump (which both heats and cools), and other clean energy technologies	64%	66%	71%	56%	72%	50%
A household with a gas vehicle, natural gas heating, air conditioning, and other fossil fuel or traditional technologies	36%	34%	29%	44%	28%	50%

Base n = 3000

Listed below are a number of clean technologies that households can adopt. Please indicate whether you have a positive or negative impression of them, or if you are unsure.

IMPRESSIONS OF CLEAN TECHNOLOGIES

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
Rooftop solar panels	76%	89%	82%	71%	78%	64%
Smart thermostats	78%	89%	83%	71%	84%	62%
Efficient electric water heaters	75%	89%	80%	69%	80%	61%
Home energy management systems	68%	88%	77%	65%	71%	48%
Heat pumps	67%	87%	73%	59%	70%	47%
Home electric vehicle charging	65%	90%	81%	59%	62%	43%
Electric vehicles	64%	92%	80%	57%	62%	40%
Home battery storage	57%	85%	69%	49%	53%	37%

Base n = 3000

Do you believe governments should help make clean technologies more accessible through incentives, such as rebates, zero-interest loans, or investments in public EV charging?

GOVERNMENT ROLE IN MAKING CLEAN TECHNOLOGIES MORE ACCESSIBLE: INCENTIVES AND INVESTMENTS

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
Governments should help make clean technologies more accessible	76%	80%	84%	73%	81%	62%
Governments should not try to make clean technologies more accessible	13%	19%	11%	15%	10%	13%
I don't know	11%	1%	5%	12%	9%	25%

Base n = 3000

Do you believe governments should help make clean technologies more competitive through market regulations, such as requiring automakers to offer more EVs, requiring cleaner fuel, or requiring energy efficiency in newly constructed homes?

GOVERNMENT ROLE IN ENHANCING COMPETITIVENESS OF CLEAN TECHNOLOGIES: MARKET REGULATIONS AND REQUIREMENTS

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
Governments should introduce market regulations that encourage clean energy and lower emissions	67%	83%	81%	64%	68%	46%
Governments should not introduce these kinds of regulations	17%	14%	11%	15%	19%	22%
I don't know	16%	3%	8%	21%	12%	31%

Base n = 3000

Who do you believe is primarily responsible for helping Canadians adopt clean technologies? (Select all that apply)

RESPONSIBILITY FOR HELPING CANADIANS ADOPT CLEAN TECHNOLOGIES: WHO SHOULD LEAD?

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
Federal government	62%	70%	66%	53%	69%	51%
Provincial government	45%	54%	50%	41%	45%	40%
Municipal government	30%	40%	38%	27%	30%	22%
Private sector / Businesses	27%	34%	27%	25%	31%	21%
Other	2%	0%	1%	3%	3%	3%
Unsure / No opinion	18%	5%	9%	23%	18%	30%

Base n = 2000

Electric Vehicles

Do you think it is certain, very likely, likely, unlikely, very unlikely or certain not to happen that electric vehicles will become the majority of consumer vehicles sold around the world?

LIKELIHOOD OF ELECTRIC VEHICLES BECOMING THE MAJORITY OF CONSUMER VEHICLES SOLD GLOBALLY

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
NET: Certain + Very likely + Likely	70%	97%	91%	71%	65%	44%
Certain	11%	25%	16%	7%	10%	2%
Very likely	26%	48%	38%	20%	21%	12%
Likely	34%	25%	36%	44%	34%	30%
NET: Unlikely + Very unlikely + Certain not to happen	30%	3%	9%	29%	35%	56%
Unlikely	20%	2%	7%	20%	25%	35%
Very unlikely	6%	0%	2%	3%	8%	12%
Certain not to happen	4%	0%	1%	6%	3%	9%

Base n = 3000

Does your household currently have an electric vehicle?

DOES YOUR HOUSEHOLD CURRENTLY OWN AN ELECTRIC VEHICLE?

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
Yes	15%	50%	25%	9%	6%	0%
No	85%	50%	75%	91%	94%	100%

Base n = 3000

Do you know someone who drives an electric vehicle?

DO YOU KNOW SOMEONE WHO DRIVES AN ELECTRIC VEHICLE?

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
NET: Yes, and I've been in it + Yes, but I haven't been in it	59%	88%	76%	55%	54%	35%
Yes, and I've been in it	36%	70%	50%	30%	30%	16%
Yes, but I haven't been in it	22%	17%	27%	25%	23%	19%
No	38%	10%	21%	41%	45%	59%
Unsure	3%	2%	3%	5%	2%	5%

Base n = 3000

Thinking about your next car, would you say you are certain to choose an electric vehicle, very likely to, inclined to buy electric, inclined to buy a gas or diesel vehicle, very likely to buy gas/diesel, or certain to buy gas/diesel?

INTENTION TO CHOOSE AN ELECTRIC OR GAS/DIESEL VEHICLE FOR YOUR NEXT CAR

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
NET: Certain to choose an electric vehicle + Very likely to choose electric + Inclined to buy electric	59%	100%	96%	48%	51%	18%
Certain to choose an electric vehicle	11%	30%	22%	6%	7%	1%
Very likely to choose electric	22%	48%	38%	15%	17%	4%
Inclined to buy electric	25%	22%	36%	27%	28%	13%
NET: Inclined to buy a gas/diesel + Very likely to buy gas/diesel + Certain to buy gas/diesel	41%	0%	4%	52%	49%	82%
Inclined to buy a gas/diesel	17%	0%	2%	21%	21%	34%
Very likely to buy gas/diesel	11%	0%	1%	17%	13%	21%
Certain to buy gas/diesel	12%	0%	0%	13%	15%	27%

Base n = 3000

Whether it's electric or gas, your next vehicle will likely be a…

WHAT TYPE OF VEHICLE WILL YOUR NEXT CAR LIKELY BE?

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
SUV	38%	50%	34%	45%	40%	24%
Sedan	25%	29%	29%	20%	21%	26%
Hatchback	7%	7%	10%	7%	8%	4%
Pickup truck	5%	5%	4%	6%	4%	6%
Minivan	4%	3%	5%	5%	3%	2%
I don't know yet	14%	4%	15%	11%	14%	21%
I don't see myself getting a vehicle	8%	1%	4%	6%	9%	17%

Base n = 3000

When you consider the lifetime cost of owning a car (including, maintenance, repairs, insurance and the cost of the energy to power it) do you think…

LIFETIME COST OF OWNING A CAR: MAINTENANCE, REPAIRS, INSURANCE, AND ENERGY COSTS

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
NET: An electric vehicle will end up much cheaper, despite a higher upfront cost + An electric vehicle will end up a bit cheaper, despite a higher upfront cost	63%	92%	84%	60%	59%	35%
An electric vehicle will end up much cheaper, despite a higher upfront cost	25%	49%	39%	19%	19%	9%
An electric vehicle will end up a bit cheaper, despite a higher upfront cost	38%	42%	45%	41%	40%	26%
NET: A gas vehicle will end up a bit cheaper + A gas vehicle will end up much cheaper	37%	8%	16%	40%	41%	65%
A gas vehicle will end up a bit cheaper	24%	7%	14%	26%	26%	39%
A gas vehicle will end up much cheaper	13%	2%	2%	14%	14%	26%

Base n = 3000

Provincial Rebates for EVs

Based on your individual income, would you qualify for B.C.'s EV rebate?

ELIGIBILITY FOR B.C.'S EV REBATE BASED ON YOUR INDIVIDUAL INCOME

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
I qualify for the full rebate	43%	33%	43%	40%	55%	35%
I qualify for the $2,000 rebate	16%	31%	20%	15%	13%	7%
I qualify for the $1,000 rebate	8%	12%	9%	19%	4%	4%
I do not qualify for any rebates	25%	22%	24%	21%	22%	38%
Prefer not to answer	7%	2%	5%	6%	7%	16%

Base n = 1500; those who live in Vancouver; Note: Frugal skeptics likely qualify to a higher rate than they report given their lower HHI. The perception that they do not qualify is likely indicative of their belief that they are unable/unwilling to purchase an EV and, as a result, they would not quality for a rebate.

Based on your answer to the previous question, you would either receive a reduced rebate or no rebate at all. Do you think it is fair that you are excluded from receiving a full rebate?

FAIRNESS OF EXCLUSION FROM FULL B.C. EV REBATE BASED ON INCOME

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
NET: Very fair + Fair	27%	47%	31%	17%	21%	16%
Very fair	5%	9%	7%	3%	3%	1%
Fair	22%	39%	24%	14%	17%	15%
Somewhat fair	28%	25%	35%	28%	19%	31%
NET: Unfair + Very unfair	46%	27%	34%	55%	60%	53%
Unfair	26%	16%	22%	29%	31%	32%
Very unfair	20%	12%	12%	27%	29%	21%

Base n = 765; those who live in Vancouver and qualify for $1k, $2k or for no rebate

Would you be more likely to purchase an EV as your next vehicle if the income requirement changed and you qualified for the full $4,000 provincial rebate?

IMPACT OF FULL $4,000 PROVINCIAL REBATE ON YOUR LIKELIHOOD TO PURCHASE AN EV

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
NET: Definitely likely + Much more likely	49%	82%	60%	36%	43%	17%
Definitely likely	14%	28%	15%	14%	12%	2%
Much more likely	35%	54%	44%	22%	31%	16%
Somewhat more likely	24%	13%	29%	33%	26%	20%
I am interested in an EV, but this wouldn't influence me either way	10%	4%	9%	9%	9%	19%
I don't intend to purchase an EV	17%	1%	3%	22%	22%	44%

Base n = 765; those who live in Vancouver and qualify for $1k, $2k or for no rebate

Quebec, B.C., Manitoba, Atlantic Canada and the Yukon offer provincial rebates to those who purchase EVs. However, Ontario does not. Do you think Ontario should offer a provincial EV rebate?

SHOULD ONTARIO OFFER A PROVINCIAL EV REBATE, LIKE OTHER PROVINCES?

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
Yes	63%	84%	72%	52%	67%	45%
No	17%	10%	15%	21%	15%	24%
Not sure	20%	5%	13%	26%	18%	31%

Base n = 1500; those who live in GTHA

Would you be more likely to purchase an EV as your next vehicle if Ontario offered a $5,000 provincial rebate?

IMPACT OF A $5,000 PROVINCIAL REBATE ON YOUR LIKELIHOOD TO PURCHASE AN EV IN ONTARIO

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
NET: Definitely likely + Much more likely	43%	87%	71%	34%	31%	18%
Definitely likely	16%	42%	26%	12%	11%	4%
Much more likely	27%	45%	44%	22%	21%	14%
Somewhat more likely	23%	10%	19%	34%	26%	23%
I am interested in an EV, but this wouldn't influence me either way	9%	2%	5%	11%	10%	13%
I don't intend to purchase an EV	25%	1%	5%	22%	33%	46%

Base n = 1500; those who live in GTHA

Barriers to Purchasing an EV

What are some barriers you think you would face when it comes to adopting an electric vehicle?

BARRIERS TO ADOPTING AN ELECTRIC VEHICLE: WHAT CHALLENGES DO YOU EXPECT?

% MAJOR BARRIER	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
Electric vehicles are too expensive for me	56%	35%	43%	52%	69%	66%
I have concerns around potential battery replacement costs	53%	37%	38%	51%	67%	60%
I suspect my home might require electrical upgrades that I cannot afford or do not want to make	45%	28%	33%	40%	54%	56%
I have concerns around the driving range of EVs	41%	28%	31%	35%	50%	49%
I do not trust public EV charging options are sufficient	36%	25%	25%	29%	45%	43%
I do not have a driveway, garage or other reliable place to charge an EV at home	35%	26%	28%	28%	37%	48%
I do not know enough about the technology	23%	20%	21%	19%	22%	30%
I am not the type of person who would drive an EV	20%	17%	13%	16%	20%	28%
I'm open to getting an EV, but none of the models available to me fit my tastes or needs	20%	21%	21%	18%	19%	21%

Base n = 3000

You said cost was a barrier for you. Which of the following would best address your concerns and help you choose to go electric? Please rank in order of importance.

ADDRESSING COST BARRIERS TO ELECTRIC VEHICLE ADOPTION: RANK THE MOST EFFECTIVE SOLUTIONS

% TOP RANKED	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
More affordable EV options available in Canada	41%	34%	39%	35%	45%	47%
Government rebates available for new EVs	19%	21%	20%	18%	21%	14%
Government rebates available for used EVs	15%	18%	17%	16%	11%	15%
Low or zero-interest financing options for EVs	14%	16%	13%	16%	13%	13%
Battery health testing for used EV	11%	12%	12%	14%	10%	11%

Base n = 2545; those who said that the cost of electric vehicles are a minor or major barrier

Roughly speaking, what is the most you would be willing to spend on a new gas-powered vehicle?

MAXIMUM WILLINGNESS TO SPEND ON A NEW GAS-POWERED VEHICLE

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
Less than $30,000	35%	13%	29%	38%	33%	54%
$30,000	18%	14%	19%	17%	20%	16%
$40,000	23%	27%	26%	18%	26%	16%
$50,000	14%	22%	13%	17%	12%	7%
$60,000	5%	11%	6%	5%	4%	2%
More than $60,000	6%	12%	6%	5%	4%	5%

Base n = 3000

And what is the most you would be willing to spend on a new electric vehicle (after rebates)?

MAXIMUM WILLINGNESS TO SPEND ON A NEW ELECTRIC VEHICLE (AFTER REBATES)

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
Less than $30,000	34%	9%	25%	40%	33%	57%
$30,000	17%	12%	18%	16%	19%	15%
$40,000	22%	26%	23%	18%	25%	18%
$50,000	15%	25%	17%	14%	15%	6%
$60,000	7%	17%	10%	7%	5%	2%
More than $60,000	5%	11%	8%	5%	3%	2%

Base n = 3000

You said access to, or the installation of charging was a concern for you. Which of the following would best address your concerns and help you choose to go electric? Please select the options that would best address your concerns.

ADDRESSING CHARGING ACCESS CONCERNS: WHAT SOLUTIONS WOULD HELP YOU CHOOSE TO GO ELECTRIC?

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
Government rebates to install a home charger	35%	41%	39%	33%	36%	25%
Sufficient public fast-chargers in your neighborhood	33%	39%	37%	31%	34%	26%
If your condo / apartment building offered EV charging options	27%	26%	32%	30%	24%	24%
Learning that you do not need to make any electrical upgrades	25%	30%	23%	19%	30%	19%
Learning that most drivers only need basic "Level 1" charging at home, using a standard outlet	23%	31%	25%	24%	23%	15%
Other	1%	0%	1%	2%	2%	1%
None of the above	13%	0%	3%	14%	13%	31%

Base n = 2698; those who said that the access to or installation of charging electric vehicles are a minor or major barrier

Take a moment to consider your daily driving habits and how often your car remains parked in your garage. On average, about how many kilometres do you think you drive in a day?

DAILY DRIVING HABITS: ON AVERAGE, HOW MANY KILOMETRES DO YOU DRIVE IN A DAY?

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
Less than 25 kilometres	36%	22%	37%	17%	45%	34%
Between 25 and 50 kilometres	33%	41%	36%	38%	30%	30%
Between 50 and 75 kilometres	16%	23%	16%	24%	13%	16%
Between 75 and 100 kilometres	9%	13%	9%	13%	6%	11%
More than 100 kilometres	6%	2%	2%	8%	6%	9%

Base n = 933; those who are homeowners in houses or townhomes who drive and do not own a electric vehicle

Electric vehicle drivers generally choose between two types of charging at home. Level 2 charging is considerably faster, but Level 1 charging can be set up at no cost using a regular outlet. Which type of charger do you think you would use?

PREFERRED HOME CHARGING OPTION FOR ELECTRIC VEHICLE: LEVEL 1 OR LEVEL 2?

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
Level 1 charging (adds 8 kilometres of range per hour, so nearly 100 kilometres if parked 12 hours) Plugs into a regular outlet	34%	41%	49%	30%	36%	16%
Level 2 charging (adds 40 kilometres of range per hour car will fully charge overnight) Requires a special outlet and in some cases electrical upgrades	39%	57%	48%	50%	33%	26%
I have no interest in an EV	27%	2%	3%	20%	31%	58%

Base n = 933; those who are homeowners in houses or townhomes who drive and do not own a electric vehicle

Knowledge of EVs

Here are a number of facts about electric vehicles. For each, tell us whether you were aware of the fact, then indicate if it would make you more or less inclined to purchase an EV as your next vehicle (regardless of when or whether you intend to get a next car)

FACT: According to numerous studies, electric vehicles have a smaller carbon footprint than gas cars no matter where they're made or charged. Canada's electricity grid is 85% clean.

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
I've heard something like this before	43%	60%	51%	37%	43%	29%
This is new information for me	57%	40%	49%	63%	57%	71%

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
NET: Much more inclined + Somewhat more inclined	50%	81%	66%	42%	48%	24%
Much more inclined	17%	35%	27%	11%	14%	4%
Somewhat more inclined	33%	46%	39%	31%	33%	19%
NET: Somewhat less inclined + Much less inclined	13%	11%	16%	21%	9%	14%
Somewhat less inclined	8%	7%	11%	12%	5%	6%
Much less inclined	5%	4%	5%	9%	3%	8%
Doesn't make a difference	27%	7%	14%	25%	33%	44%
Don't know	10%	1%	4%	13%	10%	18%

Base n = 3000

Here are a number of facts about electric vehicles. For each, tell us whether you were aware of the fact, then indicate if it would make you more or less inclined to purchase an EV as your next vehicle (regardless of when or whether you intend to get a next car)

FACT: When charged with 100% clean electricity, EVs are 90% cleaner than gas cars, including emissions from manufacturing the vehicle. Canada's grid is 84% clean, and B.C. and Ontario's grids are over 90% clean.

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
I've heard something like this before	38%	54%	47%	38%	35%	24%
This is new information for me	62%	46%	53%	62%	65%	76%

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
NET: Much more inclined + Somewhat more inclined	53%	82%	70%	46%	52%	26%
Much more inclined	18%	35%	30%	12%	15%	5%
Somewhat more inclined	35%	47%	40%	33%	37%	20%
NET: Somewhat less inclined + Much less inclined	12%	12%	13%	18%	8%	13%
Somewhat less inclined	7%	7%	9%	12%	5%	6%
Much less inclined	5%	5%	4%	6%	3%	7%
Doesn't make a difference	25%	5%	12%	26%	30%	44%
Don't know	9%	1%	5%	11%	10%	17%

Base n = 3000

Here are a number of facts about electric vehicles. For each, tell us whether you were aware of the fact, then indicate if it would make you more or less inclined to purchase an EV as your next vehicle (regardless of when or whether you intend to get a next car)

FACT: All EVs sold today include a battery warranty of at least eight years and 160,000 kilometers.

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
I've heard something like this before	32%	52%	40%	30%	31%	17%
This is new information for me	68%	48%	60%	70%	69%	83%

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
NET: Much more inclined + Somewhat more inclined	51%	77%	67%	42%	52%	26%
Much more inclined	17%	34%	25%	12%	16%	5%
Somewhat more inclined	34%	43%	42%	31%	35%	22%
NET: Somewhat less inclined + Much less inclined	15%	13%	16%	23%	11%	15%
Somewhat less inclined	9%	10%	13%	14%	7%	6%
Much less inclined	6%	3%	3%	9%	4%	9%
Doesn't make a difference	24%	7%	12%	22%	27%	42%
Don't know	10%	3%	5%	13%	10%	16%

Base n = 3000

Here are a number of facts about electric vehicles. For each, tell us whether you were aware of the fact, then indicate if it would make you more or less inclined to purchase an EV as your next vehicle (regardless of when or whether you intend to get a next car)

FACT: A recent study showed that the majority of EVs that have been driven more than 160,000 kilometres still retained at least 90% of their original range.

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
I've heard something like this before	26%	47%	36%	25%	19%	14%
This is new information for me	74%	53%	64%	75%	81%	86%

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
NET: Much more inclined + Somewhat more inclined	52%	81%	67%	46%	52%	25%
Much more inclined	17%	36%	26%	9%	16%	4%
Somewhat more inclined	35%	45%	40%	36%	35%	21%
NET: Somewhat less inclined + Much less inclined	14%	13%	15%	20%	10%	15%
Somewhat less inclined	9%	10%	12%	13%	6%	8%
Much less inclined	5%	3%	4%	8%	4%	8%
Doesn't make a difference	24%	5%	11%	23%	27%	42%
Don't know	11%	2%	7%	12%	12%	17%

Base n = 3000

Here are a number of facts about electric vehicles. For each, tell us whether you were aware of the fact, then indicate if it would make you more or less inclined to purchase an EV as your next vehicle (regardless of when or whether you intend to get a next car)

FACT: When factoring in total ownership costs (fuel, maintenance, etc.), EVs end up being significantly cheaper overall than gas cars, according to multiple Canadian studies.

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
I've heard something like this before	47%	59%	59%	43%	48%	29%
This is new information for me	53%	41%	41%	57%	52%	71%

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
NET: Much more inclined + Somewhat more inclined	54%	81%	70%	47%	53%	29%
Much more inclined	20%	37%	30%	12%	17%	8%
Somewhat more inclined	34%	44%	41%	35%	35%	21%
NET: Somewhat less inclined + Much less inclined	14%	14%	15%	19%	10%	16%
Somewhat less inclined	8%	9%	12%	11%	6%	7%
Much less inclined	6%	5%	4%	8%	4%	9%
Doesn't make a difference	23%	4%	10%	23%	29%	38%
Don't know	9%	1%	4%	11%	9%	17%

Base n = 2000

Here are a number of facts about electric vehicles. For each, tell us whether you were aware of the fact, then indicate if it would make you more or less inclined to purchase an EV as your next vehicle (regardless of when or whether you intend to get a next car)

FACT: Gas prices would have to plummet to roughly 40 cents per litre to match the cost of EV charging, according to a recent Canadian study.

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
I've heard something like this before	26%	47%	36%	26%	19%	15%
This is new information for me	74%	53%	64%	74%	81%	85%

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
NET: Much more inclined + Somewhat more inclined	51%	81%	67%	45%	49%	24%
Much more inclined	20%	40%	30%	14%	16%	7%
Somewhat more inclined	31%	41%	36%	31%	33%	17%
NET: Somewhat less inclined + Much less inclined	14%	12%	16%	21%	11%	15%
Somewhat less inclined	9%	8%	12%	13%	6%	8%
Much less inclined	5%	4%	3%	8%	5%	7%
Doesn't make a difference	24%	6%	11%	21%	28%	41%
Don't know	11%	1%	7%	12%	12%	20%

Base n = 3000

Here are a number of facts about electric vehicles. For each, tell us whether you were aware of the fact, then indicate if it would make you more or less inclined to purchase an EV as your next vehicle (regardless of when or whether you intend to get a next car)

FACT: Electric vehicles accelerate very quickly, which can help with highway merges.

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
I've heard something like this before	43%	53%	47%	39%	44%	34%
This is new information for me	57%	47%	53%	61%	56%	66%

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
NET: Much more inclined + Somewhat more inclined	45%	75%	60%	35%	43%	22%
Much more inclined	15%	32%	22%	10%	13%	5%
Somewhat more inclined	30%	44%	38%	25%	30%	16%
NET: Somewhat less inclined + Much less inclined	14%	15%	16%	19%	9%	15%
Somewhat less inclined	8%	9%	12%	12%	6%	6%
Much less inclined	6%	6%	4%	7%	3%	9%
Doesn't make a difference	31%	9%	17%	31%	39%	47%
Don't know	10%	1%	7%	14%	10%	16%

Base n = 3000

Here are a number of facts about electric vehicles. For each, tell us whether you were aware of the fact, then indicate if it would make you more or less inclined to purchase an EV as your next vehicle (regardless of when or whether you intend to get a next car)

FACT: The average range of new EVs sold last year was 468 kilometres.

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
I've heard something like this before	35%	51%	39%	32%	35%	22%
This is new information for me	65%	49%	61%	68%	65%	78%

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
NET: Much more inclined + Somewhat more inclined	44%	76%	59%	35%	43%	19%
Much more inclined	15%	31%	20%	10%	13%	5%
Somewhat more inclined	30%	45%	39%	25%	30%	14%
NET: Somewhat less inclined + Much less inclined	18%	14%	17%	28%	15%	21%
Somewhat less inclined	11%	11%	12%	17%	8%	10%
Much less inclined	7%	3%	5%	10%	6%	10%
Doesn't make a difference	27%	7%	17%	24%	33%	41%
Don't know	11%	2%	6%	14%	10%	19%

Base n = 3000

Here are a number of facts about electric vehicles. For each, tell us whether you were aware of the fact, then indicate if it would make you more or less inclined to purchase an EV as your next vehicle (regardless of when or whether you intend to get a next car)

FACT: Most Canadians drive less than 60 kilometres per day and can do all of their charging at home.

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
I've heard something like this before	42%	55%	48%	37%	42%	31%
This is new information for me	58%	45%	52%	63%	58%	69%

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
NET: Much more inclined + Somewhat more inclined	48%	76%	66%	39%	47%	22%
Much more inclined	17%	34%	26%	12%	15%	4%
Somewhat more inclined	31%	42%	40%	27%	32%	19%
NET: Somewhat less inclined + Much less inclined	15%	14%	16%	20%	10%	17%
Somewhat less inclined	9%	11%	12%	13%	5%	8%
Much less inclined	6%	4%	4%	7%	5%	9%
Doesn't make a difference	28%	8%	15%	30%	35%	41%
Don't know	9%	2%	3%	11%	9%	19%

Base n = 3000

Here are a number of facts about electric vehicles. For each, tell us whether you were aware of the fact, then indicate if it would make you more or less inclined to purchase an EV as your next vehicle (regardless of when or whether you intend to get a next car)

FACT: EVs are expected to use only about 3% of Canada's total electricity supply in 2030, growing gradually to 23% by 2050.

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
I've heard something like this before	25%	47%	33%	24%	18%	17%
This is new information for me	75%	53%	67%	76%	82%	83%

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
NET: Much more inclined + Somewhat more inclined	43%	76%	58%	34%	40%	21%
Much more inclined	15%	33%	22%	10%	13%	4%
Somewhat more inclined	28%	43%	36%	24%	28%	17%
NET: Somewhat less inclined + Much less inclined	17%	14%	18%	24%	12%	19%
Somewhat less inclined	11%	11%	13%	17%	8%	8%
Much less inclined	6%	3%	6%	7%	3%	11%
Doesn't make a difference	29%	8%	18%	31%	36%	42%
Don't know	11%	1%	6%	11%	12%	19%

Base n = 3000

Here are a number of facts about electric vehicles. For each, tell us whether you were aware of the fact, then indicate if it would make you more or less inclined to purchase an EV as your next vehicle (regardless of when or whether you intend to get a next car)

FACT: An electric vehicle is 60 times less likely to catch fire than a gas car.

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
I've heard something like this before	27%	45%	35%	28%	23%	15%
This is new information for me	73%	55%	65%	72%	77%	85%

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
NET: Much more inclined + Somewhat more inclined	46%	74%	66%	38%	44%	20%
Much more inclined	17%	31%	29%	12%	15%	6%
Somewhat more inclined	29%	43%	37%	26%	29%	14%
NET: Somewhat less inclined + Much less inclined	18%	16%	17%	24%	15%	21%
Somewhat less inclined	10%	11%	12%	14%	7%	8%
Much less inclined	9%	5%	5%	10%	8%	14%
Doesn't make a difference	26%	8%	12%	24%	32%	42%
Don't know	10%	1%	5%	14%	9%	17%

Base n = 3000

Here are a number of facts about electric vehicles. For each, tell us whether you were aware of the fact, then indicate if it would make you more or less inclined to purchase an EV as your next vehicle (regardless of when or whether you intend to get a next car)

FACT: If all new vehicles sold were electric by 2035, one study found there would be 2.8 million fewer asthma attacks among children in the U.S. alone.

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
I've heard something like this before	22%	43%	29%	21%	14%	11%
This is new information for me	78%	57%	71%	79%	86%	89%

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
NET: Much more inclined + Somewhat more inclined	51%	75%	69%	40%	50%	27%
Much more inclined	21%	37%	31%	12%	20%	7%
Somewhat more inclined	30%	38%	37%	27%	31%	20%
NET: Somewhat less inclined + Much less inclined	14%	16%	14%	22%	9%	15%
Somewhat less inclined	9%	11%	10%	15%	5%	7%
Much less inclined	5%	5%	4%	6%	4%	8%
Doesn't make a difference	25%	8%	12%	24%	31%	39%
Don't know	10%	1%	5%	14%	10%	19%

Base n = 3000

Reassessing Purchase Intent

Taking into consideration the information provided to you, when thinking about your next vehicle purchase, which will you choose?

CONSIDERING ALL INFORMATION: WHAT WILL YOU CHOOSE FOR YOUR NEXT VEHICLE PURCHASE?

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
NET: Certain to choose an electric vehicle + Very likely to choose electric + Inclined to buy electric	65%	95%	92%	57%	61%	32%
Certain to choose an electric vehicle	11%	25%	21%	5%	9%	1%
Very likely to choose electric	23%	44%	37%	18%	19%	6%
Inclined to buy electric	31%	25%	34%	34%	33%	25%
NET: Inclined to buy a gas/diesel + Very likely to buy gas/diesel + Certain to buy gas/diesel	35%	5%	8%	43%	39%	68%
Inclined to buy a gas/diesel	15%	3%	6%	20%	16%	28%
Very likely to buy gas/diesel	9%	1%	1%	12%	10%	16%
Certain to buy gas/diesel	11%	1%	1%	11%	14%	24%

Base n = 3000

Heat Pumps

From what you know about heat pumps, how would you feel about installing one in your home?

HOW WOULD YOU FEEL ABOUT INSTALLING A HEAT PUMP IN YOUR HOME?

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
My home already has a heat pump	10%	20%	14%	10%	6%	3%
I would like to get a heat pump at some point	15%	20%	19%	15%	15%	6%
I need to learn more about heat pumps, but I have a positive impression of them	19%	26%	21%	18%	20%	12%
I need to learn more about heat pumps, but I have a negative impression of them	7%	10%	7%	11%	8%	3%
I don't want to get a heat pump because the technology doesn't appeal to me	5%	4%	4%	4%	5%	7%
I don't think a heat pump would make sense for my home	9%	7%	8%	6%	13%	9%
I do not own my home	23%	9%	19%	23%	22%	38%
Don't know	12%	2%	8%	13%	12%	23%

Base n = 3000

What are some barriers you think you would face installing a heat pump when it comes time to update your existing heating system (either because your current system requires replacement or you wish to add cooling and energy efficiency)? (Major barrier; minor barrier, not a barrier)

BARRIERS TO INSTALLING A HEAT PUMP: CHALLENGES WHEN UPDATING YOUR HEATING SYSTEM

% MAJOR BARRIER	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
I suspect a heat pump would cost more to install than the alternative	41%	34%	34%	36%	47%	45%
I suspect my home might require electrical upgrades that I cannot afford or do not want to make	41%	33%	36%	36%	45%	45%
I rent my home and do not have control over these choices or the ability to do installations	34%	29%	33%	31%	31%	42%
I do not know enough about the technology	31%	26%	27%	26%	31%	40%
I am not the type of person who would install a heat pump	21%	23%	20%	16%	19%	28%

Base n = 3000

Which of the following would best address your concerns and help you choose a heat pump? Please rank in order of importance.

ADDRESSING CONCERNS ABOUT HEAT PUMP INSTALLATION: RANK THE MOST EFFECTIVE SOLUTIONS

% TOP RANKED	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
Government rebates for heat pumps	38%	36%	42%	35%	37%	37%
Learning that a heat pump can be paired with your existing heating system, lowering bills and providing cooling	18%	12%	13%	20%	23%	20%
Learning that your home does not require additional electrical upgrades to support a heat pump	14%	11%	13%	12%	16%	16%
Hearing from a friend that they're very satisfied with their heat pump	12%	20%	12%	17%	8%	11%
Low or zero-interest loans to finance heat pumps	11%	18%	14%	11%	8%	9%
Learning that heat pumps can be installed in many condos	6%	4%	6%	5%	7%	8%

Base n = 1865; those who are not renting

Knowledge of Heat Pumps

Here are a number of facts about heat pumps. Select all that you previously knew about before this survey.

FACT: Modern heat pumps can operate in weather as cold as -30C.

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
I've heard something like this before	32%	49%	37%	29%	31%	20%
This is new information for me	68%	51%	63%	71%	69%	80%

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
NET: Much more inclined + Somewhat more inclined	51%	77%	63%	43%	50%	29%
Much more inclined	19%	36%	24%	15%	19%	9%
Somewhat more inclined	31%	41%	40%	29%	31%	20%
NET: Somewhat less inclined + Much less inclined	12%	13%	16%	18%	9%	9%
Somewhat less inclined	8%	10%	10%	11%	5%	6%
Much less inclined	4%	3%	6%	7%	4%	3%
Doesn't make a difference	26%	9%	15%	24%	30%	43%
Don't know	11%	1%	6%	15%	12%	19%

Base n = 3000

Here are a number of facts about heat pumps. Select all that you previously knew about before this survey.

FACT: Heat pumps are highly energy efficient, making them good for the environment in almost all cases—especially when replacing a natural gas or oil heating system.

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
I've heard something like this before	46%	60%	50%	38%	52%	29%
This is new information for me	54%	40%	50%	62%	48%	71%

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
NET: Much more inclined + Somewhat more inclined	55%	78%	67%	46%	57%	32%
Much more inclined	20%	35%	28%	14%	21%	9%
Somewhat more inclined	34%	43%	39%	32%	36%	23%
NET: Somewhat less inclined + Much less inclined	11%	14%	15%	19%	6%	9%
Somewhat less inclined	7%	11%	11%	12%	3%	5%
Much less inclined	4%	3%	4%	7%	3%	4%
Doesn't make a difference	24%	7%	13%	21%	27%	42%
Don't know	10%	2%	5%	15%	10%	18%

Base n = 3000

Here are a number of facts about heat pumps. Select all that you previously knew about before this survey.

FACT: Heat pumps are two to five times more efficient than gas furnaces.

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
I've heard something like this before	37%	53%	39%	34%	39%	22%
This is new information for me	63%	47%	61%	66%	61%	78%

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
NET: Much more inclined + Somewhat more inclined	56%	79%	67%	47%	60%	33%
Much more inclined	22%	38%	30%	17%	23%	10%
Somewhat more inclined	34%	41%	37%	30%	38%	23%
NET: Somewhat less inclined + Much less inclined	11%	14%	15%	18%	6%	10%
Somewhat less inclined	7%	11%	10%	11%	4%	6%
Much less inclined	4%	4%	6%	8%	2%	4%
Doesn't make a difference	22%	6%	12%	20%	24%	39%
Don't know	11%	1%	6%	15%	10%	18%

Base n = 3000

Here are a number of facts about heat pumps. Select all that you previously knew about before this survey.

FACT: Heat pumps function as air conditioners as well as heating systems.

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
I've heard something like this before	47%	54%	47%	37%	59%	35%
This is new information for me	53%	46%	53%	63%	41%	65%

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
NET: Much more inclined + Somewhat more inclined	55%	78%	66%	48%	59%	31%
Much more inclined	23%	38%	30%	15%	23%	13%
Somewhat more inclined	32%	40%	36%	33%	36%	18%
NET: Somewhat less inclined + Much less inclined	12%	14%	16%	18%	6%	11%
Somewhat less inclined	8%	10%	12%	13%	3%	6%
Much less inclined	4%	3%	5%	6%	3%	5%
Doesn't make a difference	23%	8%	12%	21%	25%	40%
Don't know	10%	1%	6%	13%	10%	18%

Base n = 3000

Here are a number of facts about heat pumps. Select all that you previously knew about before this survey.

FACT: Heat pumps are the lowest-cost option for heating and cooling for most households in Canada even when factoring in equipment costs, according to a recent study.

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
I've heard something like this before	37%	54%	42%	32%	39%	22%
This is new information for me	63%	46%	58%	68%	61%	78%

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
NET: Much more inclined + Somewhat more inclined	55%	80%	65%	46%	57%	31%
Much more inclined	21%	38%	26%	15%	22%	10%
Somewhat more inclined	34%	43%	39%	31%	36%	22%
NET: Somewhat less inclined + Much less inclined	12%	12%	16%	21%	6%	9%
Somewhat less inclined	7%	9%	11%	14%	3%	4%
Much less inclined	4%	3%	5%	7%	3%	4%
Doesn't make a difference	23%	6%	14%	19%	26%	41%
Don't know	11%	1%	5%	14%	11%	19%

Base n = 3000

Here are a number of facts about heat pumps. Select all that you previously knew about before this survey.

FACT: In most provinces, there are a number of government rebates to lower the upfront cost of buying a heat pump.

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
I've heard something like this before	39%	56%	43%	34%	42%	25%
This is new information for me	61%	44%	57%	66%	58%	75%

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
NET: Much more inclined + Somewhat more inclined	55%	78%	65%	48%	59%	30%
Much more inclined	20%	35%	27%	12%	21%	9%
Somewhat more inclined	35%	43%	38%	37%	38%	21%
NET: Somewhat less inclined + Much less inclined	12%	14%	18%	18%	6%	10%
Somewhat less inclined	7%	10%	13%	9%	3%	5%
Much less inclined	5%	4%	5%	9%	3%	5%
Doesn't make a difference	23%	6%	11%	21%	25%	42%
Don't know	10%	2%	6%	13%	10%	18%

Base n = 3000

Here are a number of facts about heat pumps. Select all that you previously knew about before this survey.

FACT: Heat pumps can be installed in all types of homes, including townhouses and many condos.

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
I've heard something like this before	41%	54%	45%	34%	45%	28%
This is new information for me	59%	46%	55%	66%	55%	72%

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
NET: Much more inclined + Somewhat more inclined	49%	77%	61%	45%	50%	25%
Much more inclined	19%	35%	25%	14%	19%	8%
Somewhat more inclined	30%	42%	36%	31%	31%	16%
NET: Somewhat less inclined + Much less inclined	11%	13%	16%	16%	6%	10%
Somewhat less inclined	8%	8%	11%	12%	4%	7%
Much less inclined	4%	5%	5%	4%	2%	3%
Doesn't make a difference	29%	8%	18%	26%	33%	47%
Don't know	11%	2%	5%	13%	11%	18%

Base n = 3000

Reassessing Interest in Heat Pumps

We would like you to now reconsider and re-answer the same question from before: how would you feel about installing a heat pump in your home?

RECONSIDERING INSTALLATION: HOW WOULD YOU FEEL ABOUT INSTALLING A HEAT PUMP IN YOUR HOME NOW?

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
My home already has a heat pump	12%	19%	19%	10%	8%	5%
I would like to get a heat pump at some point	30%	36%	30%	31%	31%	17%
I need to learn more about heat pumps, but I have a favourable impression of them	25%	22%	24%	23%	30%	20%
I need to learn more about heat pumps, but I have a negative impression of them	7%	12%	8%	6%	5%	8%
I don't want to get a heat pump because the technology doesn't appeal to me	6%	3%	5%	10%	4%	13%
I don't think a heat pump would make sense for my home	12%	5%	9%	11%	13%	18%
Don't know	8%	2%	4%	7%	9%	18%

Base n = 1614; homeowners with or without a mortgage

Installation of Heat Pumps in New Construction

In regions of the province where heating needs can be met with heat pumps, should new buildings be permitted to connect to natural gas for heat in the construction phase or should they come with heat pumps instead?

SHOULD NEW BUILDINGS IN REGIONS WITH HEAT PUMP SUITABILITY BE PERMITTED TO CONNECT TO NATURAL GAS, OR SHOULD THEY BE BUILT WITH HEAT PUMPS INSTEAD?

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
New buildings should be allowed to connect to natural gas heating	25%	41%	26%	25%	20%	21%
New buildings should come with heat pumps wherever it makes sense	53%	53%	61%	48%	59%	42%
Don't know	21%	5%	13%	26%	20%	37%

Base n = 3000

Similarly, should new buildings be permitted to install traditional air conditioning where a heat pump could provide cooling instead?

SHOULD NEW BUILDINGS BE PERMITTED TO INSTALL TRADITIONAL AIR CONDITIONING, OR SHOULD HEAT PUMPS BE USED FOR COOLING INSTEAD?

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
New buildings should be allowed to install air conditioning over heat pumps	23%	35%	26%	24%	16%	23%
New buildings should come with heat pumps wherever it makes sense	56%	59%	64%	50%	65%	41%
Don't know	20%	6%	11%	26%	20%	36%

Base n = 3000

Energy Smart Homes

How important is it to you that your next home be an energy smart home?

HOW IMPORTANT IS IT TO YOU THAT YOUR NEXT HOME BE AN ENERGY-SMART HOME?

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
NET: Very important + Important	57%	94%	80%	48%	56%	22%
Very important	25%	47%	37%	18%	23%	6%
Important	32%	47%	43%	29%	32%	16%
Somewhat important	25%	6%	17%	38%	26%	35%
NET: Not very important + Not at all important	18%	0%	3%	15%	18%	44%
Not very important	11%	0%	2%	9%	12%	24%
Not at all important	7%	0%	0%	5%	6%	20%

Base n = 3000

Which of the following factors most contribute to your interest in an energy smart home? (Select all that apply)

FACTORS CONTRIBUTING TO YOUR INTEREST IN AN ENERGY-SMART HOME

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
Reducing monthly bills	62%	52%	59%	57%	75%	57%
Enjoying a more comfortable living environment	44%	48%	48%	39%	51%	34%
Taking advantage of rebates or tax incentives	44%	48%	42%	32%	53%	37%
Future-proofing your home against rising energy costs	43%	45%	45%	34%	53%	31%
Minimizing your environmental impact	40%	44%	47%	33%	47%	27%
Enhancing the resale value of your property	32%	34%	34%	25%	39%	22%
Access to advanced and innovative home energy technologies	29%	40%	35%	24%	31%	18%
None of the above	12%	1%	3%	15%	8%	28%

Base n = 3000

Are you interested in a home energy management system now or in the future?

ARE YOU INTERESTED IN A HOME ENERGY MANAGEMENT SYSTEM NOW OR IN THE FUTURE?

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
I am interested in the near term. I already have or plan to soon adopt technologies it could manage	20%	50%	30%	18%	11%	6%
I am interested in the long term. It makes me more open to adopting certain technologies in the future knowing this complementary solution exists	45%	47%	55%	51%	47%	28%
I do not see myself ever adopting such a system for my home	17%	1%	4%	12%	24%	33%
I don't know	18%	3%	10%	19%	19%	32%

Base n = 3000

Time-of-use policies have been developed for both B.C. and Ontario. To what degree are you interested in signing up for time-of-use pricing at some point within the next five years?

INTEREST IN TIME-OF-USE PRICING: WOULD YOU CONSIDER SIGNING UP WITHIN THE NEXT FIVE YEARS?

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
NET: Very interested + Somewhat interested	61%	92%	78%	52%	59%	34%
Very interested	23%	40%	27%	14%	24%	11%
Somewhat interested	38%	51%	52%	38%	35%	23%
NET: Not that interested + Not at all interested	22%	6%	12%	29%	24%	33%
Not that interested	11%	4%	8%	18%	12%	12%
Not at all interested	11%	1%	5%	11%	12%	21%
Unsure	17%	3%	10%	20%	17%	33%

Base n = 3000

How likely are you to consider each of the following home upgrades?

LIKELIHOOD OF CONSIDERING EACH OF THE FOLLOWING HOME UPGRADES

% LIKELY + VERY LIKELY	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
Smart thermostat	64%	87%	76%	60%	66%	37%
Efficient (heat pump) electric hot water heater	57%	88%	73%	54%	52%	30%
Home energy management system	54%	86%	72%	52%	48%	26%
Smart (time-based) EV charging	47%	85%	70%	45%	39%	17%
Rooftop solar panels	45%	80%	63%	44%	31%	25%
Home battery storage	44%	80%	62%	41%	35%	18%

Base n = 3000

Much in the same way that it is often said that younger generations face systemic barriers in the housing market, do you think that younger people (under the age of 40) in your city face similar systemic barriers around accessing and adopting the clean technologies mentioned above?

SYSTEMIC BARRIERS FOR YOUNGER GENERATIONS: ACCESSING AND ADOPTING CLEAN TECHNOLOGIES

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
Younger people face a lot of barriers	32%	36%	34%	28%	31%	32%
Younger people face some barriers	28%	41%	34%	26%	26%	18%
Younger people don't have it any worse than other generations	17%	13%	17%	20%	18%	14%
Younger people have it easier	6%	7%	4%	5%	8%	6%
I don't know	17%	3%	11%	21%	18%	29%

Base n = 2000

Information Sources

Where do you primarily receive information on topics like electric vehicles and energy-efficient home improvements? (Select all that apply)

INFORMATION SOURCES: EVS AND ENERGY-EFFICIENT HOME IMPROVEMENTS

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
News outlets (mainstream or alternative)	43%	40%	42%	38%	53%	33%
Social media platforms	42%	55%	47%	53%	29%	39%
Friends and family	46%	56%	47%	56%	49%	29%
Environmental or non-profit organizations	17%	28%	18%	13%	18%	7%
Local community groups or places of worship	13%	26%	17%	13%	9%	6%
Vendors (e g , car dealerships, installation companies)	18%	29%	25%	10%	14%	12%
Other (please specify)	2%	0%	2%	1%	3%	3%
None of the above	12%	1%	5%	11%	14%	26%

Base n = 1000

When considering home upgrades, which sources of information influence your decisions the most? (Select all that apply)

SOURCES OF INFORMATION THAT IMPACT YOUR DECISIONS

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
Contractors or installation professionals	29%	28%	27%	18%	38%	26%
Social media (e g , Instagram, TikTok)	26%	38%	33%	32%	16%	24%
Online forums or discussion boards (e g , Reddit)	18%	27%	21%	20%	15%	14%
Search engine results (e g , Google)	43%	36%	44%	41%	46%	42%
Advertisements (online, print, or TV)	23%	25%	21%	24%	28%	17%
Videos or tutorials (e g , YouTube)	29%	35%	32%	23%	27%	29%
Friends and family	50%	47%	42%	58%	57%	46%
Neighbors	19%	21%	18%	21%	20%	16%

Base n = 1000

When deciding whether to purchase new technology or upgrade your home, how important are each of the following factors? Please select up to 3 factors that are most important to you

FACTORS TO CONSIDER WHEN DECIDING WHETHER TO INVEST IN NEW TECHNOLOGY

	Total	SEGMENTS				
		Net-Zero Dads	Generation Green	Practical Families	Retired Homeowners	Frugal Skeptics
Potential cost savings	61%	44%	50%	55%	74%	69%
Convenience or time savings	32%	35%	33%	33%	25%	38%
Reduction in carbon footprint	31%	39%	33%	17%	36%	23%
Improved home comfort	46%	36%	39%	42%	56%	50%
Enhanced home safety	33%	27%	36%	40%	32%	31%
Increased property value	32%	28%	29%	25%	36%	37%
A more modern or updated appearance for your home	14%	28%	17%	12%	10%	11%

Base n = 1000

Demographics

DEMOGRAPHICS

REGION	
BC	50%
ON	50%
GENDER	
Male	50%
Female	50%
AGE GROUP	
18 to 29	19%
30 to 44	25%
45 to 59	25%
60 and over	31%
EDUCATION	
HS or less	31%
College	37%
University	32%
What best describes your employment status?	
Permanent full-time	42%
Self-employed	8%
Full-time contract that is renewed	2%
Provide services on a freelance basis	0%
Employed part-time	10%
Student	4%
Retired	20%
Unemployed	9%
Unemployed because of COVID-19	0%
Stay at home	3%
Other	1%

Do you own or rent your home?	
Own with a mortgage	27%
Own with no mortgage	23%
Rent	41%
Live with family	9%
Which best describes the residential property that live in?	
Single detached house	47%
Semidetached house	8%
Row or townhouse	11%
Condo / strata / apartment	33%
Mobile home/structure	1%
Other	1%
Do you have regular access to a vehicle that you can drive?	
Yes	79%
No	21%
Other	1%
Would you consider or not consider voting for the following federal political parties? % Would consider	
Conservative Party	52%
Liberal Party	45%
New Democratic Party	42%
Green Party	34%
Bloc Québécois	10%
People's Party of Canada	22%
The Maverick Party	11%

DEMOGRAPHICS

If a federal election were held tomorrow, which one of the following parties would you vote for in your constituency?	
Pierre Poilievre's Conservative Party	33%
Justin Trudeau's Liberal Party	21%
Jagmeet Singh's New Democratic Party	15%
Elizabeth May's Green Party	5%
Yves-François Blanchet's Bloc Quebecois	0%
Max Bernier's People's Party of Canada	2%
Another party	1%
I'm undecided right now	23%
Do you consider yourself to be on the right, the centre right, the centre, the centre left, or the left of the political spectrum?	
Left	9%
Centre left	18%
Centre	50%
Centre right	14%
Right	8%
We know that many people in your riding didn't vote in the last federal election in 2021 Do you remember if you voted or not in that election?	
I did not vote	28%
I voted	67%
Can't remember	6%

In the last federal election in 2021, which party did you vote for?	
Conservative Party	29%
Liberal Party	44%
NDP	16%
Green Party	6%
Bloc Quebecois	0%
Peoples Party of Canada	2%
Prefer not to say	3%
Another Party	0%
Which best describes the place where you live?	
Urban	55%
Suburban	41%
Rural	4%
Do you have children in the following age ranges?	
I do not have children	39%
Under 2	6%
3 to 4	7%
5 to 8	9%
9 to 11	8%
12 to 14	9%
15 to 17	10%
17 to 18	0%
18 and older	30%

DEMOGRAPHICS

How would you describe your marital status?	
Married / Domestic Partner	53%
Widowed	5%
Divorced	7%
Separated	4%
Single / Never Married	32%
How do you typically commute to work? (Select all that apply)	
Drive alone	41%
Carpool or ride-share	6%
Public transportation (bus, train, etc.)	24%
Bicycle	5%
Walk	16%
Work from home	12%
Other	1%
Not applicable / no commute	26%
Which of the following best describes your annual household income (before taxes)?	
Less than $35,000	19%
$35,000 to $50,000	14%
$50,001 to $75,000	18%
$75,001 to $100,000	18%
$100,001 to $150,000	17%
Over $150,000	9%
Rather not say	5%

Which of the following statements best describes you:	
I was born in Canada	67%
I was born in another country, and have been living in Canada less than one year	2%
I was born in another country, and have been living in Canada between 1 and five years	5%
I was born in another country, and have been living in Canada between 6 and 10 years	5%
I was born in another country, and have been living in Canada between 11 and 20 years	6%
I was born in another country, and have been living in Canada more than 20 years	15%
Prefer not to answer	1%
Do you identify as Indigenous?	
Yes	5%
No	95%
Which of the following groups do you belong?	
First Nations	54%
Metis	28%
Inuk (Inuit)	4%
Prefer not to say	13%
Self-Identify	1%

DEMOGRAPHICS

Which of the following relate to your racial identity? (Please select all that apply)	
Arab	2%
Black	9%
Chinese	9%
Filipino	4%
Japanese	1%
Korean	1%
Latin American	2%
South Asian	9%
Southeast Asian	2%
West Asian	1%
White	61%
Other	2%
Prefer Not to Say	3%

What language do you primarily speak at home?	
English	88%
French	1%
Spanish	1%
Mandarin	2%
Punjabi	1%
Arabic	0%
German	0%
Italian	0%
Tagalog	1%
Russian	0%
Urdu	1%
Vietnamese	1%
Bengali	0%
Other	3%
I do not speak a language at home	0%

Thank You

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