Empowering Households

Key findings for policymakers to advance adoption of EVs and heat pumps

September 2025

CLEAN ENERGY CANADA

SFU MORRIS J. WOSK CENTRE FOR DIALOGUE

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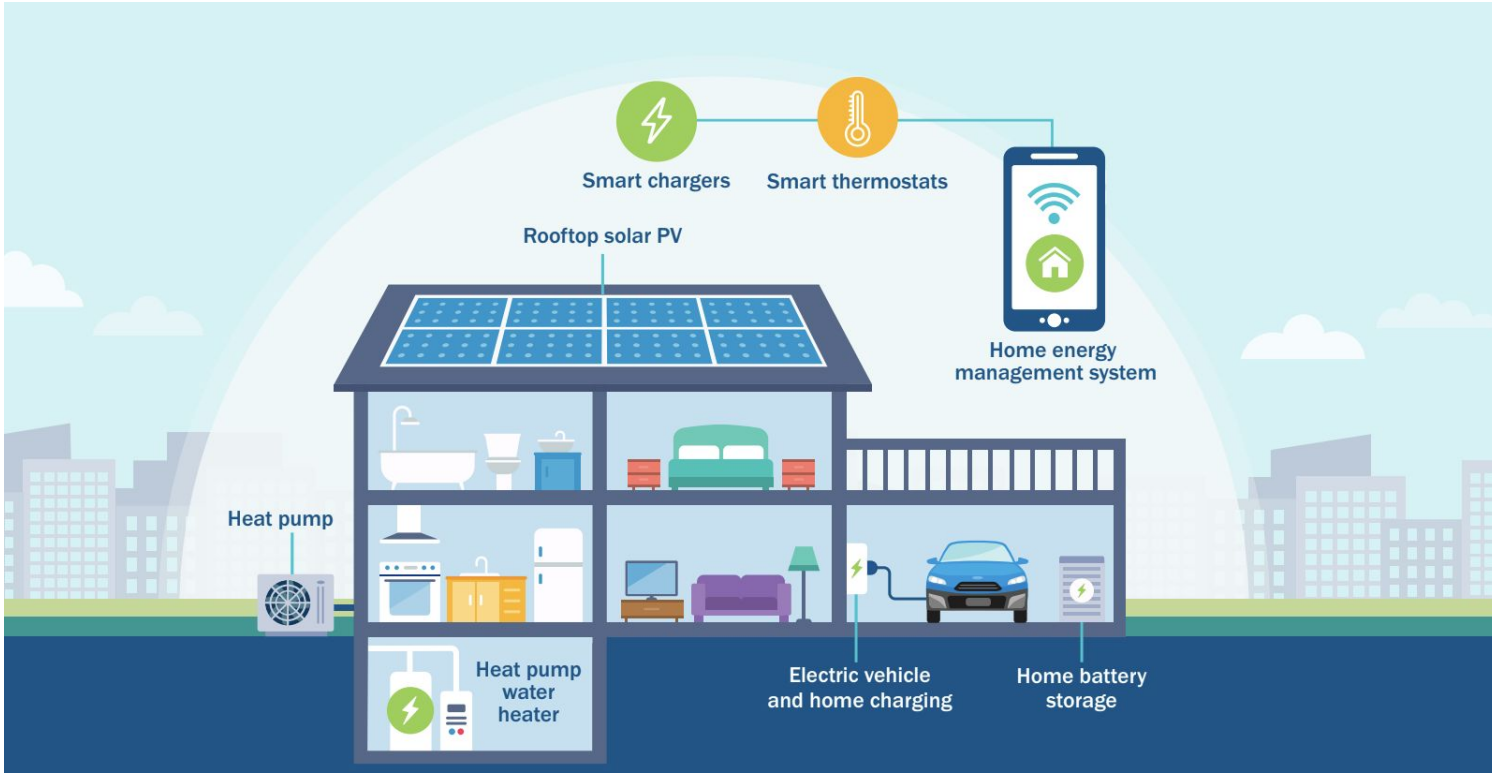
PART 1

Introduction

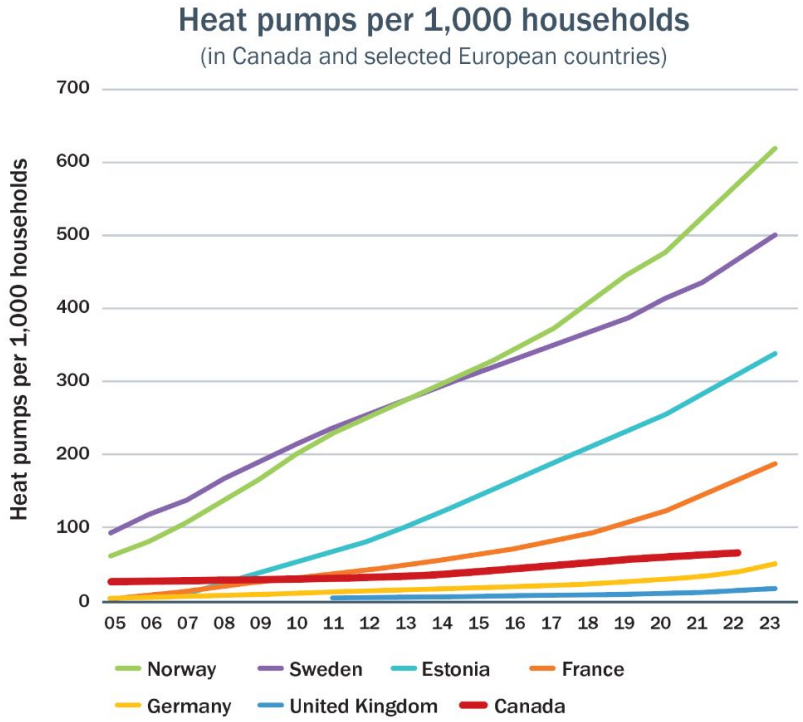
Why household clean technology adoption is critical

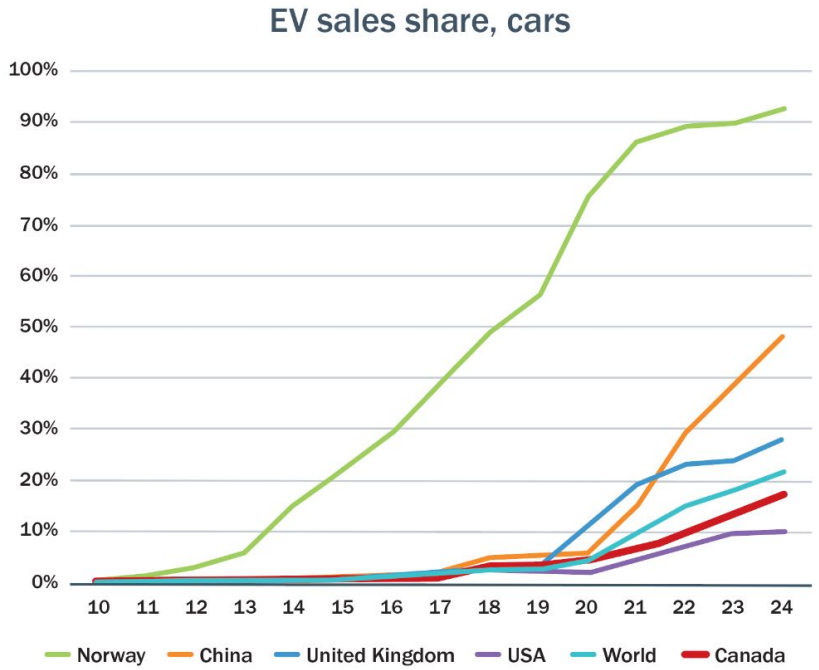
- **Drives down direct emissions:** Accounting for 17% nationally, but up to almost a third of emissions in provinces without oil and gas, Canada can't hit its targets without EVs and heat pumps.
- **Reduces fossil fuel demand:** Private vehicles were responsible for more than 25% of global oil use in 2023, and an uptake in electric vehicles in China is already reducing global oil demand growth
- **Spurs technology development:** For every EV, heat pump, rooftop solar panel, or battery built, sold, and deployed, we drive down the cost of the next one.
- **Grows clean investment:** In advanced economies with strong policies, households have accounted for nearly 60% of clean energy investment growth since 2016.
- **Creates a network effect:** Each adopter increases the likelihood that their neighbours will also adopt a technology, and there is some evidence that one technology can be a gateway to others.
- **Expands our electricity resources:** Electro-technologies that produce, store, or manage power—like rooftop solar, home batteries, and EVs—can be managed collectively by utilities as a single "virtual power plant" to help reduce costs and buildout required to meet electricity demand.

An energy smart home



How is Canadian adoption faring compared to the rest of the world?





PART 2

Methodology and key findings of 2025 market research

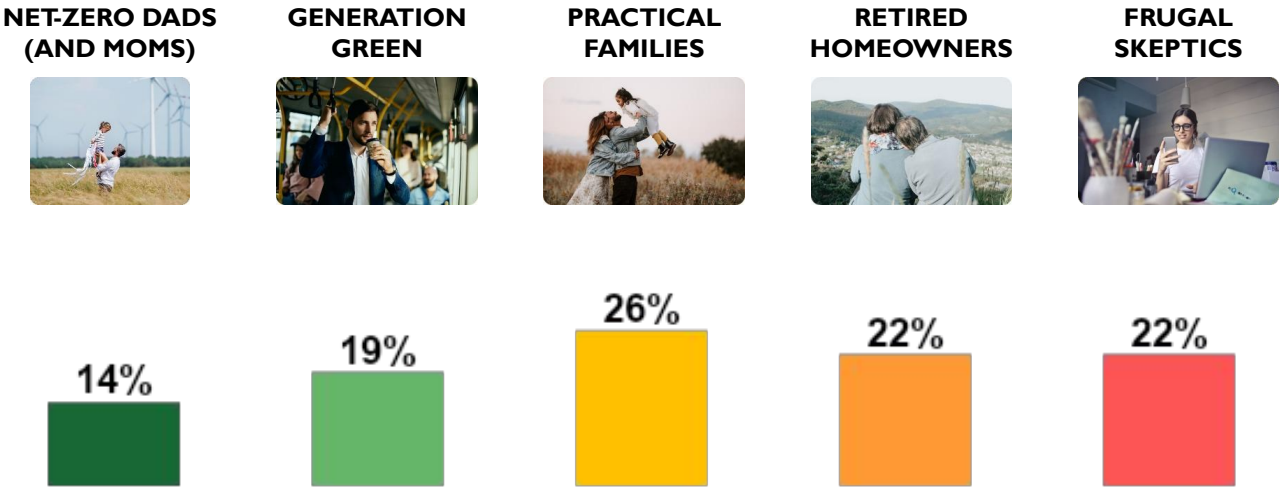
Methodology

Between November 2024 and January 2025, Abacus Data and Clean Energy Canada surveyed 3,000 residents of Canada's two largest English-speaking metro regions, the Greater Toronto and Hamilton Area and Metro Vancouver, with a focus on people's understanding of and interest in clean technologies, including benefit awareness and barriers to adoption.

- Overall results presented include all respondents.
- In the sections on EVs and heat pumps, the data was filtered to target "accessible consumers"(removing those who already own the technology, those who indicated that they have a "very negative" perception of the technology and for heat pumps only, non-home owners).
- Throughout the presentation, a % indicates a significantly higher proportion than the % in the same segment.

Methodology: Segmentation of groups

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, etc. This approach identified distinct segments based on attitudes, behaviors, and demographics, offering insights into motivations for adopting clean technologies.



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

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.

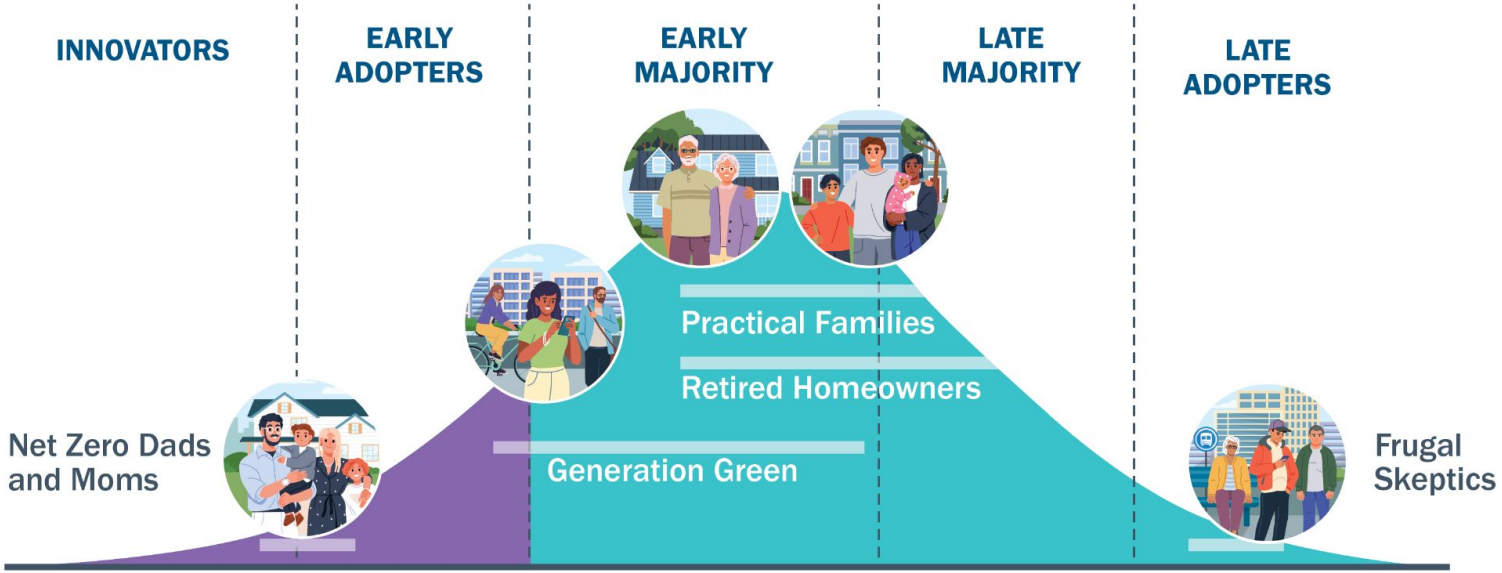
RETIRED HOMEOWNERS

- 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

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

Technology adoption curve for household clean tech



Net Zero Dads and Moms have the interest and resources that make them likely to be innovators and early adopters.

Generation Green, Practical Families, and Retired Homeowners have various levels of interest in clean technology and all face barriers that keep them from being early adopters.

Frugal Skeptics have lowered interest and face high barriers, and are therefore likely to be the last to adopt.

Key Findings

There is strong interest in clean technologies across all demographics. The challenge isn't interest or politics - most people know this saves them money. The challenge is people face real barriers to adoption.

- **59% are inclined to buy an EV as their next car** (69% in Vancouver, where adoption is much higher), 56% have or positively view heat pumps, and 57% say it's important their next home is energy smart.
- **Some technologies are even more universally appealing:** 78% supporting solar panels, 76% supporting smart thermostats, and 75% endorsing efficient electric water heaters.
- **Over half of respondents (57%) believe households using clean technologies**, such as EVs and heat pumps, will pay smaller monthly energy bills, and 64% think they will spend less overall after a decade.

Key Findings

Governments have a key role to play in addressing these barriers. People expect them to be taking action to help get them access to cost saving technologies.

- **Support for consumer incentives is high**: 76% support incentives such as rebates, zero-interest loans, and investments in public charging with only 13% opposition. This is higher than introducing market regulations at 67% support with 17% opposing.
- **Many renters are inclined to adopt, but need government assistance to address their barriers to access.** Three-quarters (75%) of those living in apartments and townhomes say that access to charging is a barrier to EV adoption, while 68% say they do not have the ability to make heat pump installation (compared to 44% of those in detached homes). Efficiency and cooling requirements for rental units and making sure new buildings are built with clean technology infrastructure can help.

Key findings

Unlocking the next wave of adopters means designing policies beyond Net Zero dads-- we need to be getting to the other target audiences with the right messages and solutions.

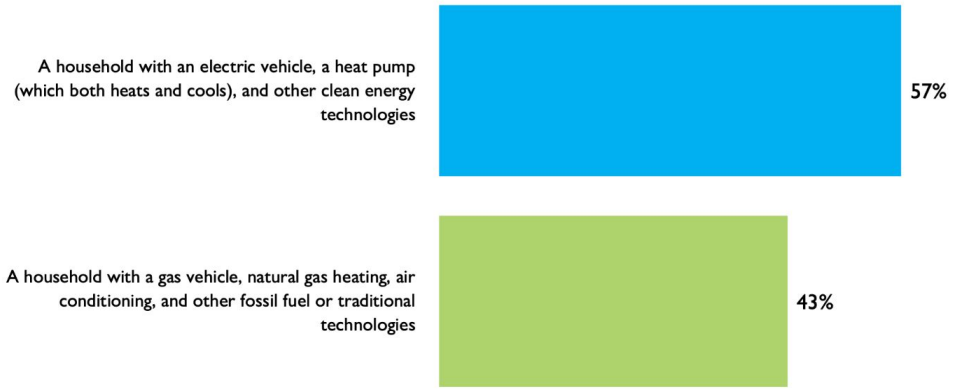
- **Younger respondents are considerably more inclined to adopt clean technologies.** For example, 71% of those under 30 want an EV for their next car, compared to 49% of those over 60. Younger people are also more likely to rent or live in apartments, limiting their ability to make electrification upgrades or access home charging.
- **For older respondents, many live in homes they own and could theoretically make upgrades, but they have more concerns about the technology.** Education and simplification can make an impact: for example, given they typically drive less, most only require Level 1 charging, eliminating the need for electrical upgrades.

Overall perceptions (all respondents)

Over 50% believe clean technologies will lower monthly energy costs

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

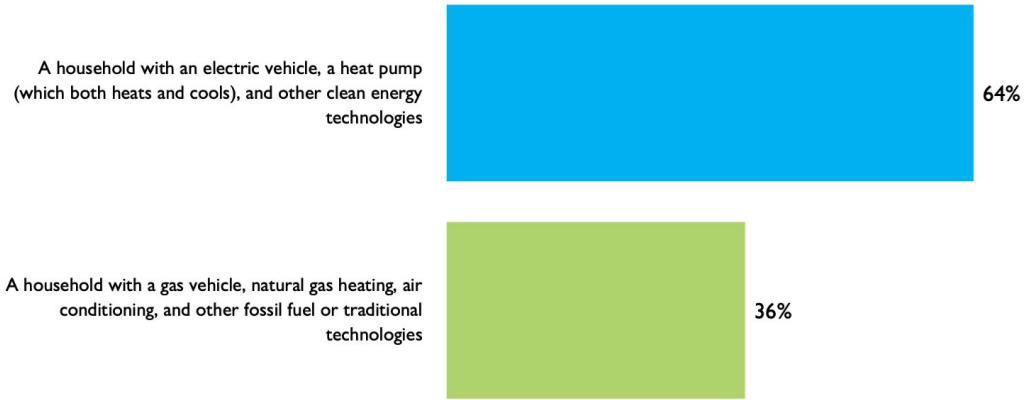
Over half of respondents believe a household with an EV, heat pump, and other clean technologies pays a smaller monthly energy bill than those who do not



Over 50% understand that households with clean energy solutions will pay less over the next decade

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.

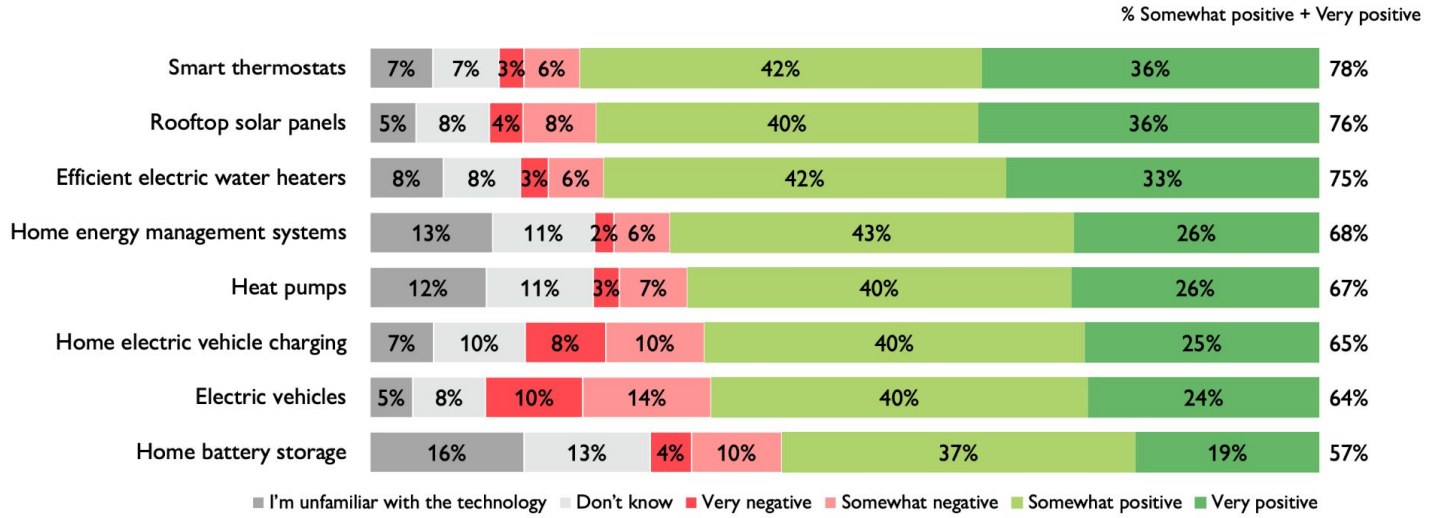
3 in 5 respondents believe a household with an EV, heat pump, and other clean technologies will have spent less overall after a decade of ownership than those who do not



Over 50% of respondents had a positive impression of all clean technologies polled

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.

Many residents in the GTHA and Metro Vancouver hold positive views on clean technologies, with 78% favouring smart thermostats, 76% supporting solar panels, and 75% endorsing efficient electric water heaters.



Positive impressions were higher among men, those born outside of Canada and were correlated with income

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.

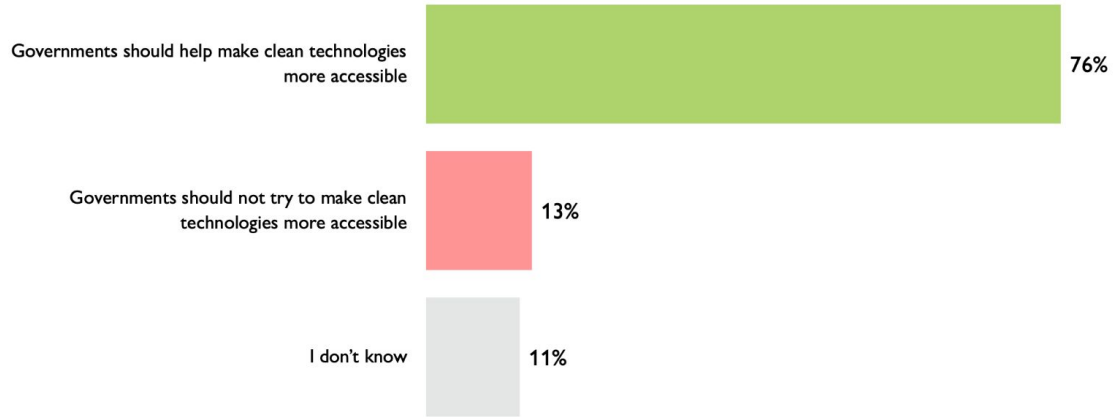
IMPRESSIONS OF CLEAN TECHNOLOGIES

% Somewhat positive + Very positive	TOTAL	CITY		AGE				GENDER		HOUSEHOLD INCOME			BORN IN…	
		METRO VAN	GTHA	18-29	30-44	45-59	60+	Male	Female	Less than $50k	$50k to $100k	Over $100k	Canada	Outside of Canada
Rooftop solar panels	76%	82%	74%	73%	78%	78%	75%	77%	75%	75%	75%	81%	76%	78%
Smart thermostats	78%	81%	77%	70%	78%	77%	83%	79%	77%	71%	80%	87%	78%	79%
Efficient electric water heaters	75%	80%	74%	73%	71%	77%	79%	78%	73%	73%	75%	81%	74%	78%
Home energy management systems	68%	70%	68%	66%	71%	68%	68%	72%	65%	64%	70%	77%	66%	74%
Heat pumps	67%	73%	64%	63%	67%	64%	70%	73%	60%	60%	67%	78%	65%	71%
Home electric vehicle charging	65%	72%	62%	70%	68%	65%	59%	70%	60%	59%	67%	73%	62%	70%
Electric vehicles	64%	72%	61%	67%	69%	63%	60%	68%	60%	61%	63%	72%	61%	72%
Home battery storage	57%	59%	56%	60%	60%	58%	50%	65%	48%	53%	56%	65%	55%	61%

Three quarters of those surveyed believe governments should help people access household clean technologies

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?

76% of residents believe that governments should support the accessibility of clean technologies by offering incentives.



Belief in government support for incentives was strong across nearly all demographics

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 SUPPORT FOR CLEAN TECHNOLOGIES: INCENTIVES AND ACCESSIBILITY

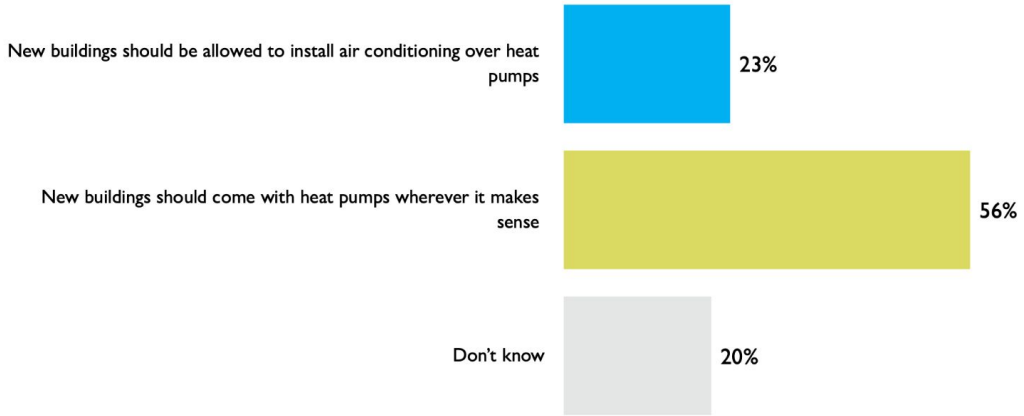
	TOTAL	CITY		AGE				GENDER		HOUSEHOLD INCOME			BORN IN…	
		METRO VAN	GTHA	18-29	30-44	45-59	60+	Male	Female	Less than $50k	$50k to $100k	Over $100k	Canada	Outside of Canada
Governments should help make clean technologies more accessible	76%	80%	75%	75%	75%	76%	77%	76%	76%	76%	75%	82%	74%	79%
Governments should not try to make clean technologies more accessible	13%	11%	13%	14%	12%	13%	12%	15%	10%	11%	15%	12%	13%	12%
I don't know	11%	9%	12%	11%	13%	11%	10%	9%	13%	13%	10%	6%	12%	8%

	TOTAL	LANGUAGE		AREA		BUILDING TYPE		HOMEOWNERSHIP		MARTIAL STATUS		CHILDREN U18		COMMUTE FOR WORK	
		ENG	Non-ENG	Urban	Suburban	House	Townhome/ Condo	Owner	Renter	Married	Single	Yes	No	Yes	No
Governments should help make clean technologies more accessible	76%	75%	81%	77%	75%	75%	77%	78%	75%	77%	75%	79%	75%	76%	76%
Governments should not try to make clean technologies more accessible	13%	13%	10%	13%	13%	14%	11%	14%	13%	13%	12%	12%	13%	14%	9%
I don't know	11%	11%	9%	10%	12%	10%	12%	8%	12%	10%	13%	9%	12%	10%	15%

Over half of respondents believe new construction should default to supporting clean technologies

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

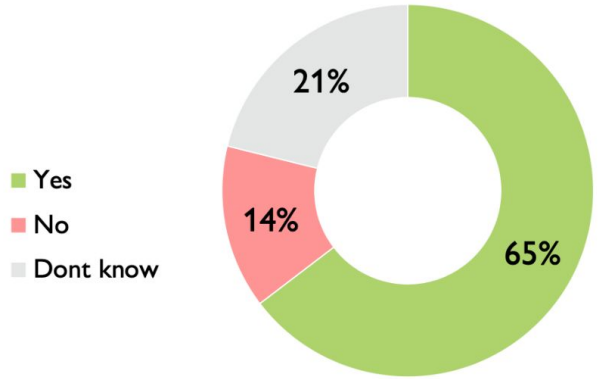
56% believe new buildings should come with heat pumps wherever it makes sense, while 23% think new buildings should be allowed to install air conditioning over heat pumps



Over half of respondents believe new construction should default to supporting clean technologies

Do you support "charge-ready" requirements for new construction?

65% of those in the GTHA and Metro Vancouver support "charge ready" requirements for new construction



Many municipalities around Vancouver and Toronto require newly constructed residential buildings to be "charge-ready," meaning they either include EV chargers or are wired for future installation. Federal and provincial governments can influence these building codes.

Detailed findings on EV adoption

KEY FINDINGS | ELECTRIC VEHICLES

GROWING SUPPORT FOR ELECTRIC VEHICLES (EVS)

70% of residents in the GTHA and Metro Vancouver believe EVs will dominate global vehicle sales, with younger Canadians (18-29; 80%, 30-44; 78%) showing the most confidence. This reflects a shift toward more sustainable options, especially among younger generations. The growing acceptance of EVs suggests that targeted outreach and education for these groups could accelerate adoption in the coming years.

BARRIERS TO EV ADOPTION AND FINANCIAL INCENTIVES

The biggest barriers to EV adoption are costs—purchase price (85%), battery replacement (85%), and electrical upgrades (77%). Many residents believe government rebates and incentives for both EVs and home charging installations are crucial to overcoming these challenges. Strong support for these financial supports highlights affordability as a key issue, making incentives an essential part of promoting EV adoption.

IMPACT OF INFORMATION ON PURCHASE INTENT

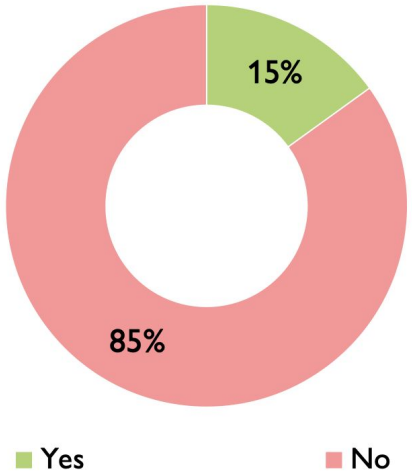
After receiving more information about EVs, 65% of residents in the GTHA and Metro Vancouver showed increased intent to purchase (a 6-point rise), especially among younger Canadians (18-29; 79%). This suggests that providing accurate information on EV benefits and savings can boost confidence and purchase intent, emphasizing the need for targeted education and awareness campaigns, particularly for younger consumers.

REBATE SUPPORT AND REGIONAL DISPARITIES

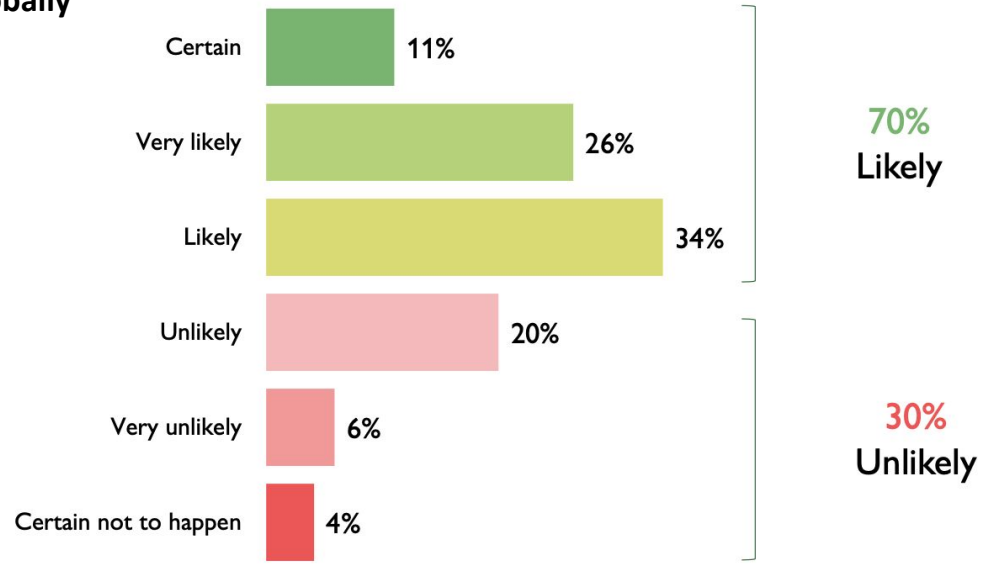
In Metro Vancouver, 57% of residents don't qualify for the full EV rebate, and 73% of those would be more likely to purchase an EV if they were eligible. In the GTHA, 66% would be more likely to buy an EV if Ontario offered a $5,000 rebate. These figures highlight that rebate limitations significantly influence EV purchase decisions, and expanding or introducing provincial rebates could greatly boost adoption, especially in areas with higher upfront costs or limited incentives.

State of Play: 15% of respondents already own an EV and 70% believe it is likely EVs will become the majority of consumer vehicles sold globally

15% of respondents currently have an EV



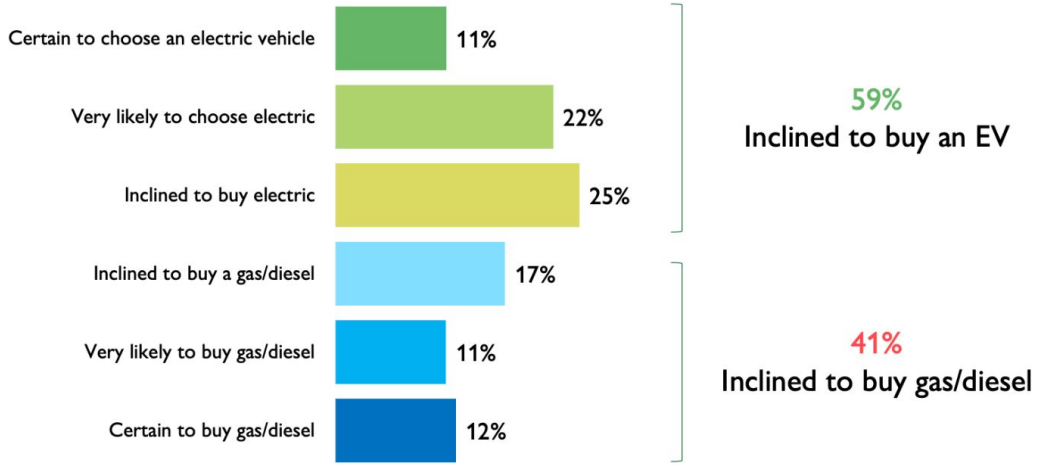
Seven out of ten residents of the GTHA and Metro Vancouver believe it is likely that EVs will become the majority of consumer vehicles sold globally



Over half of all respondents are inclined to purchase an EV for their next vehicle

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?

58% of those in the GTHA and Metro Vancouver are inclined to purchase an EV when considering their next vehicle



Inclination to purchase: demographic breakdown

Consistently stronger inclination in younger demographics and those born outside of Canada

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	CITY		AGE				GENDER		HOUSEHOLD INCOME			BORN IN...	
		METRO VAN	GTHA	18-29	30-44	45-59	60+	Male	Female	Less than $50k	$50k to $100k	Over $100k	Canada	Outside of Canada
NET: Inclined to buy an EV	59%	69%	55%	71%	68%	53%	49%	64%	53%	53%	60%	66%	53%	72%
Certain to choose an electric vehicle	11%	14%	11%	15%	16%	10%	7%	14%	9%	10%	10%	17%	10%	14%
Very likely to choose electric	22%	26%	21%	31%	27%	20%	15%	26%	19%	21%	23%	25%	18%	33%
Inclined to buy electric	25%	29%	24%	25%	25%	23%	27%	25%	25%	23%	26%	25%	25%	25%
NET: Inclined to buy a gas/diesel	41%	31%	45%	29%	32%	47%	51%	36%	47%	47%	40%	34%	47%	28%
Inclined to buy a gas/diesel	17%	15%	18%	14%	14%	21%	20%	16%	19%	19%	18%	15%	19%	14%
Very likely to buy gas/diesel	11%	9%	12%	9%	10%	12%	13%	10%	13%	12%	13%	8%	14%	7%
Certain to buy gas/diesel	12%	7%	14%	6%	9%	13%	18%	10%	15%	16%	10%	11%	15%	7%

Inclination to purchase: demographic breakdown

Appeal specifically to commuters, those who know someone who has an EV, homeowners and those who do not have children under 18

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

	TOT	LANGUAGE		AREA		BUILDING TYPE		HOMEOWNERSHIP		MARTIAL STATUS		CHILDREN U18		COMMUTE FOR WORK		KNOW SOMEONE WHO HAS AN EV	
		ENG	Non-ENG	Urban	Suburban	House	Townhome/ Condo	Owner	Renter	Married	Single	Yes	No	Yes	No	YES	No
NET: Inclined to buy an EV	59%	57%	74%	65%	52%	61%	56%	68%	56%	62%	56%	49%	65%	64%	46%	73%	37%
Certain to choose an electric vehicle	11%	11%	15%	14%	8%	12%	10%	15%	10%	12%	10%	7%	15%	13%	7%	16%	5%
Very likely to choose electric	22%	21%	33%	26%	19%	23%	21%	30%	20%	25%	19%	17%	26%	26%	12%	31%	9%
Inclined to buy electric	25%	25%	27%	25%	25%	25%	24%	23%	26%	24%	26%	25%	24%	25%	26%	26%	23%
NET: Inclined to buy a gas/diesel	41%	43%	26%	35%	48%	39%	44%	32%	44%	38%	44%	51%	35%	36%	54%	27%	63%
Inclined to buy a gas/diesel	17%	18%	12%	16%	20%	16%	20%	12%	19%	16%	19%	22%	15%	16%	22%	14%	23%
Very likely to buy gas/diesel	11%	12%	9%	10%	13%	11%	12%	10%	12%	10%	12%	13%	11%	10%	14%	8%	17%
Certain to buy gas/diesel	12%	13%	5%	9%	15%	13%	12%	11%	13%	12%	13%	16%	10%	10%	18%	5%	23%

Network effect to-date mirrors current adoption patterns

Higher among younger respondents, male, Metro Van and those born outside of Canada

Do you know someone who drives an electric vehicle?

DO YOU KNOW SOMEONE WHO DRIVE AN EV?

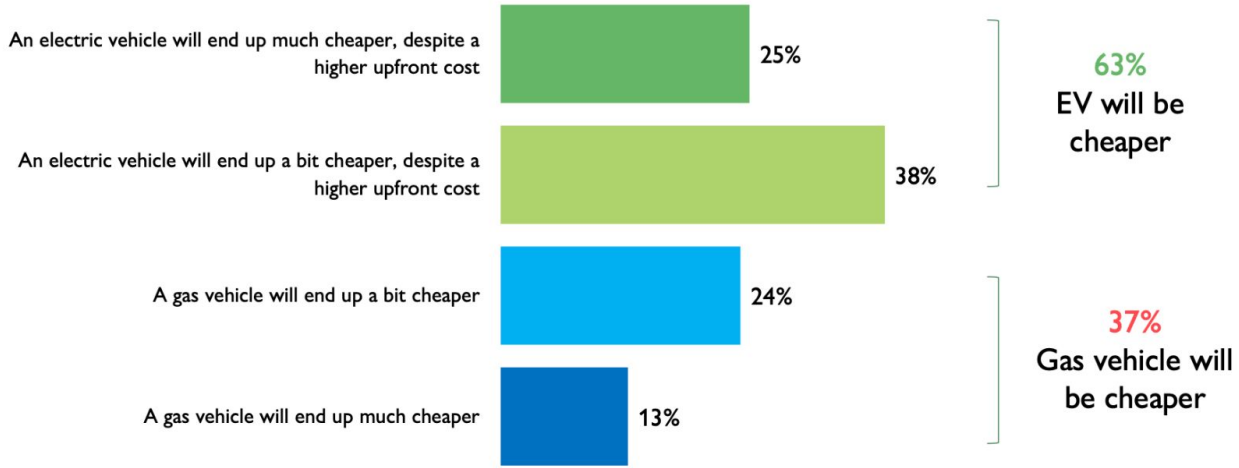
	TOTAL	CITY		AGE				GENDER		HOUSEHOLD INCOME			BORN IN...	
		METRO VAN	GTHA	18-29	30-44	45-59	60+	Male	Female	Less than $50k	$50k to $100k	Over $100k	Canada	Outside of Canada
Yes, and I've been in it	36%	50%	32%	50%	41%	33%	28%	41%	32%	24%	40%	50%	34%	41%
Yes, but I haven't been in it	22%	23%	22%	23%	21%	25%	21%	22%	22%	21%	25%	23%	21%	26%
No	38%	25%	43%	22%	34%	40%	50%	33%	43%	52%	32%	26%	42%	30%
Unsure	3%	3%	3%	5%	4%	3%	2%	3%	3%	4%	3%	1%	3%	4%

	TOTAL	LANGUAGE		AREA		BUILDING TYPE		HOMEOWNERSHIP		MARTIAL STATUS		CHILDREN U18		COMMUTE FOR WORK	
		ENG	Non-ENG	Urban	Suburban	House	Townhome/ Condo	Owner	Renter	Married	Single	Yes	No	Yes	No
Yes, and I've been in it	36%	36%	37%	41%	33%	40%	32%	48%	30%	42%	30%	32%	42%	42%	21%
Yes, but I haven't been in it	22%	21%	31%	20%	26%	23%	21%	25%	20%	23%	22%	23%	23%	24%	18%
No	38%	39%	28%	36%	38%	33%	44%	26%	46%	33%	44%	43%	31%	32%	56%
Unsure	3%	3%	4%	3%	3%	3%	3%	1%	4%	2%	4%	2%	4%	2%	6%

Broad awareness of the lower lifetime cost of electric vehicles

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…

63% of residents in the GTHA and Metro Vancouver believe the lifetime cost of owning an electric vehicle (EV) will be lower, despite the higher initial purchase price.

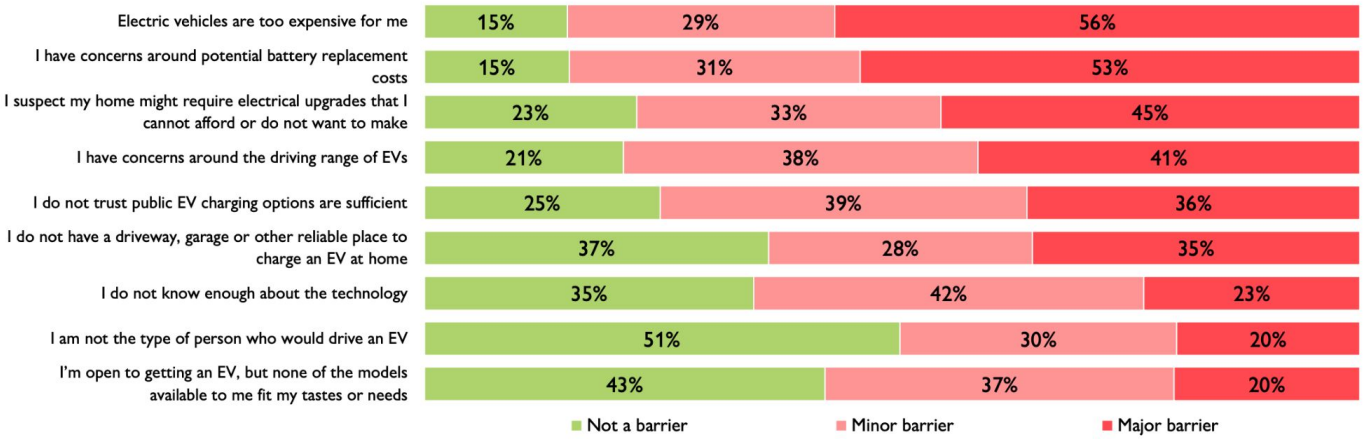


Barriers to EV Adoption

Cost is key, but some cost concerns, like battery replacement, could be alleviated by greater awareness and education

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

The biggest barriers to adopting an electric vehicle (EV) are cost (85%), battery replacement costs (84%), concerns about the expense and need for electrical upgrades (78%), and range anxiety (79%).



Barriers to EV adoption: demographic breakdown

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?

% Minor + Major barrier	TOTAL	CITY		AGE				GENDER		HOUSEHOLD INCOME			BORN IN…	
		METRO VAN	GTHA	18-29	30-44	45-59	60+	Male	Female	Less than $50k	$50k to $100k	Over $100k	Canada	Outside of Canada
Electric vehicles are too expensive for me	85%	86%	84%	79%	81%	86%	89%	82%	88%	86%	86%	81%	85%	85%
I have concerns around potential battery replacement costs	85%	85%	84%	80%	81%	86%	90%	83%	86%	83%	87%	83%	85%	84%
I suspect my home might require electrical upgrades that I cannot afford or do not want to make	77%	78%	77%	75%	75%	79%	79%	74%	81%	78%	81%	72%	77%	79%
I have concerns around the driving range of EVs	79%	79%	79%	74%	75%	79%	84%	77%	81%	75%	81%	80%	79%	78%
I do not trust public EV charging options are sufficient	75%	74%	75%	72%	69%	75%	81%	71%	78%	76%	75%	74%	74%	76%
I do not have a driveway, garage or other reliable place to charge an EV at home	63%	63%	63%	69%	63%	65%	58%	60%	66%	72%	64%	52%	61%	68%
I do not know enough about the technology	65%	61%	66%	66%	62%	66%	65%	59%	71%	69%	66%	58%	65%	64%
I am not the type of person who would drive an EV	49%	45%	51%	55%	49%	47%	47%	48%	50%	53%	49%	44%	48%	52%
I'm open to getting an EV, but none of the models available to me fit my tastes or needs	57%	58%	57%	64%	60%	58%	50%	60%	55%	58%	58%	55%	54%	62%

Barriers to EV adoption: demographic breakdown

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?

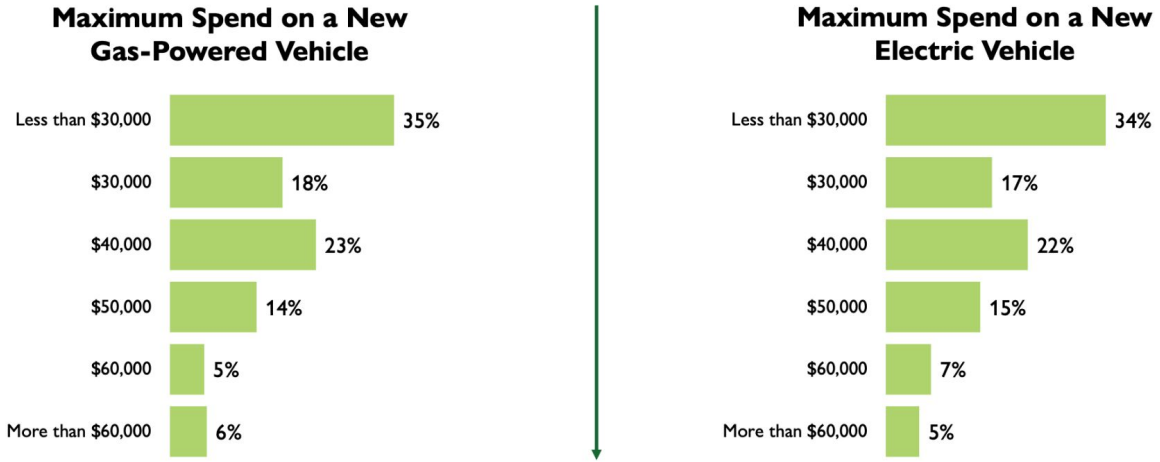
% Minor + Major barrier	TOT	LANGUAGE		AREA		BUILDING TYPE		HOMEOWNERSHIP		MARTIAL STATUS		CHILDREN U18		COMMUTE FOR WORK		KNOW SOMEONE WHO HAS AN EV	
		ENG	Non-ENG	Urban	Suburban	House	Townhome/ Condo	Owner	Renter	Married	Single	Yes	No	Yes	No	YES	No
Electric vehicles are too expensive for me	85%	85%	87%	84%	86%	84%	86%	86%	86%	86%	84%	92%	82%	84%	86%	84%	87%
I have concerns around potential battery replacement costs	85%	84%	86%	83%	86%	85%	84%	87%	84%	85%	84%	90%	82%	84%	85%	84%	87%
I suspect my home might require electrical upgrades that I cannot afford or do not want to make	77%	77%	79%	76%	78%	78%	77%	81%	79%	77%	77%	79%	77%	77%	77%	77%	79%
I have concerns around the driving range of EVs	79%	78%	82%	77%	81%	81%	76%	83%	76%	81%	76%	86%	76%	79%	79%	79%	79%
I do not trust public EV charging options are sufficient	75%	75%	76%	72%	77%	75%	75%	77%	74%	75%	74%	83%	71%	74%	77%	73%	79%
I do not have a driveway, garage or other reliable place to charge an EV at home	63%	63%	68%	66%	58%	54%	75%	59%	75%	57%	70%	52%	64%	65%	59%	62%	66%
I do not know enough about the technology	65%	65%	66%	63%	66%	66%	63%	66%	67%	63%	67%	66%	64%	64%	66%	62%	69%
I am not the type of person who would drive an EV	49%	50%	46%	48%	50%	50%	48%	50%	53%	48%	51%	48%	51%	50%	46%	46%	55%
I'm open to getting an EV, but none of the models available to me fit my tastes or needs	57%	56%	65%	57%	57%	58%	55%	60%	59%	56%	59%	51%	61%	61%	47%	59%	54%

Understanding upfront cost as a barrier

A majority would like to spend $30,000 or less on either a gas or electric vehicle, but almost half of potential consumers could afford a $40,000 electric vehicle

Roughly speaking, what is the most you would be willing to spend on a new gas-powered vehicle?
And what is the most you would be willing to spend on a new electric vehicle (after rebates)?

GTHA and Metro Vancouver residents would be willing to spend the same on a new electric vehicle as they would on a new gas-powered vehicle



Maximum willingness to spend: demographic breakdown

Generally consumers want to spend the same after rebates on an electric vehicle as they would on a gas-powered car

MAXIMUM WILLINGNESS TO SPEND ON A NEW GAS-POWERED VEHICLE

	TOTAL	CITY		AGE				GENDER		HOUSEHOLD INCOME			BORN IN…	
		METRO VAN	GTHA	18-29	30-44	45-59	60+	Male	Female	Less than $50k	$50k to $100k	Over $100k	Canada	Outside of Canada
Less than $30,000	35%	34%	35%	33%	36%	35%	35%	29%	41%	61%	24%	14%	36%	31%
$30,000	18%	17%	18%	16%	15%	18%	20%	17%	18%	16%	20%	15%	16%	20%
$40,000	23%	23%	23%	24%	17%	24%	25%	24%	22%	16%	27%	27%	22%	25%
$50,000	14%	14%	13%	14%	16%	12%	12%	16%	11%	5%	19%	18%	14%	13%
$60,000	5%	6%	5%	6%	7%	5%	4%	7%	4%	1%	6%	12%	5%	6%
More than $60,000	6%	6%	6%	6%	8%	6%	4%	8%	4%	2%	4%	14%	6%	6%

	TOTAL	LANGUAGE		AREA		BUILDING TYPE		HOMEOWNERSHIP		MARTIAL STATUS		CHILDREN U18		COMMUTE FOR WORK	
		ENG	Non-ENG	Urban	Suburban	House	Townhome/ Condo	Owner	Renter	Married	Single	Yes	No	Yes	No
Less than $30,000	35%	35%	34%	36%	32%	27%	45%	18%	50%	27%	43%	30%	33%	31%	46%
$30,000	18%	18%	17%	16%	19%	18%	17%	17%	18%	18%	18%	20%	17%	17%	18%
$40,000	23%	23%	25%	23%	23%	25%	21%	28%	18%	25%	21%	27%	22%	24%	20%
$50,000	14%	14%	10%	14%	14%	16%	10%	21%	8%	17%	9%	15%	15%	15%	9%
$60,000	5%	5%	9%	5%	5%	7%	4%	8%	4%	6%	4%	4%	6%	6%	3%
More than $60,000	6%	6%	5%	5%	7%	7%	4%	8%	3%	7%	5%	4%	7%	6%	4%

Maximum willingness to spend: demographic breakdown

Generally consumers want to spend the same after rebates on an electric vehicle as they would on a gas-powered car

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

	TOTAL	CITY		AGE				GENDER		HOUSEHOLD INCOME			BORN IN...	
		METRO VAN	GTHA	18-29	30-44	45-59	60+	Male	Female	Less than $50k	$50k to $100k	Over $100k	Canada	Outside of Canada
Less than $30,000	34%	31%	36%	31%	35%	37%	34%	29%	39%	58%	24%	14%	37%	28%
$30,000	17%	15%	17%	15%	15%	17%	18%	15%	19%	18%	17%	13%	16%	17%
$40,000	22%	23%	22%	23%	18%	23%	24%	23%	21%	15%	29%	24%	22%	24%
$50,000	15%	16%	14%	14%	17%	12%	15%	17%	12%	6%	19%	20%	14%	17%
$60,000	7%	9%	6%	9%	9%	7%	4%	8%	6%	1%	7%	15%	6%	9%
More than $60,000	5%	6%	5%	8%	6%	4%	4%	7%	3%	2%	3%	13%	5%	6%

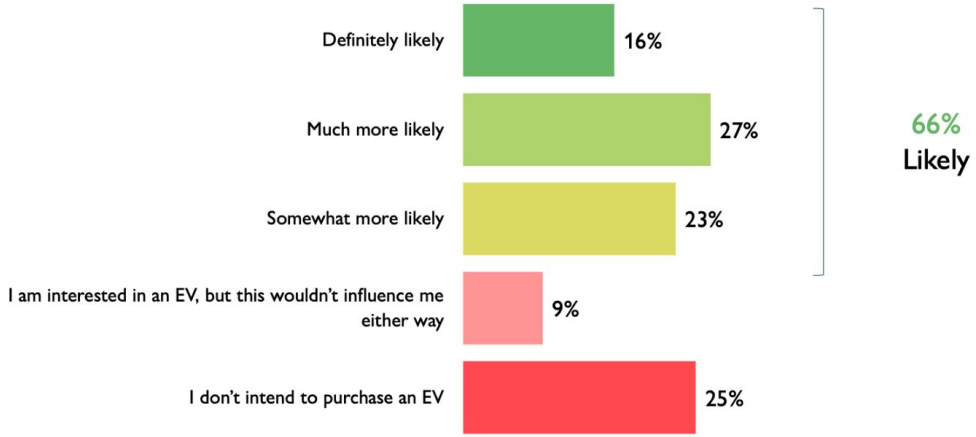
	TOTAL	LANGUAGE		AREA		BUILDING TYPE		HOMEOWNERSHIP		MARTIAL STATUS		CHILDREN U18		COMMUTE FOR WORK		KNOW SOMEONE WHO HAS AN EV	
		ENG	Non-ENG	Urban	Suburban	House	Townhome/ Condo	Owner	Renter	Married	Single	Yes	No	Yes	No	YES	No
Less than $30,000	34%	35%	29%	34%	33%	28%	41%	19%	48%	27%	43%	32%	31%	30%	45%	25%	49%
$30,000	17%	17%	16%	15%	18%	16%	18%	15%	17%	17%	16%	17%	15%	17%	16%	17%	18%
$40,000	22%	22%	23%	23%	22%	25%	19%	28%	18%	25%	19%	26%	22%	23%	19%	26%	19%
$50,000	15%	15%	15%	15%	15%	16%	13%	21%	10%	17%	12%	16%	15%	16%	11%	17%	8%
$60,000	7%	6%	11%	7%	6%	9%	5%	11%	4%	8%	6%	5%	9%	8%	4%	7%	2%
More than $60,000	5%	5%	5%	6%	5%	6%	4%	7%	3%	7%	4%	3%	7%	6%	4%	7%	3%

Solving upfront cost: rebates can meaningfully impact intent to purchase

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

66% of GTHA residents say they would be more likely to purchase an electric vehicle (EV) for their next vehicle if Ontario offered a $5,000 provincial rebate.

GTHA RESIDENTS



...but there is even stronger support for attracting affordable EV models to Canada

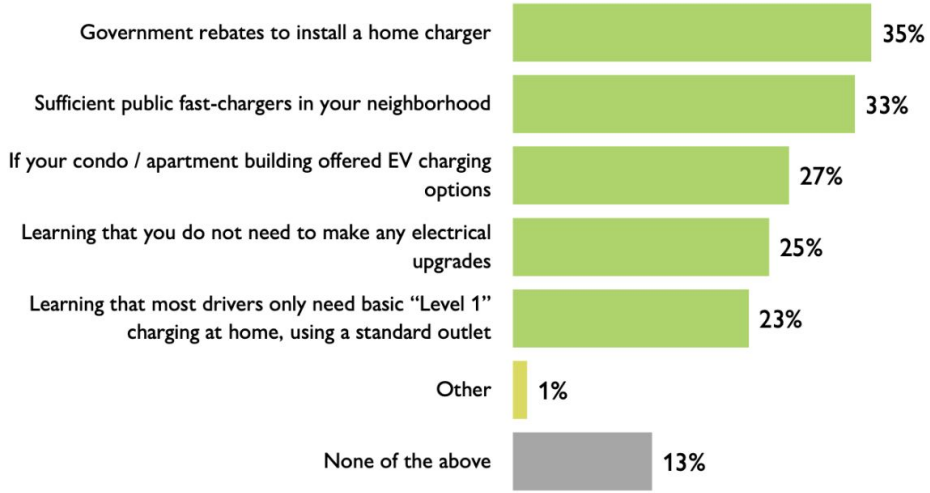
You said cost was a barrier for you. Which of the following would best address your concerns and help you choose to go electric? Please rank in order of importance.

Residents of the GTHA and Metro Vancouver who identified cost as a barrier believe that more affordable EV options, along with government incentives for both new and used EVs, would help address these cost challenges.

Solving charging access

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.

Among those who expressed concerns about charging installation, 35% believe that government rebates for installing a home charger would address their worries, while 33% cited the availability of sufficient fast chargers in their neighborhood as a solution.



Solving charging access

Younger and lower-income respondents identified charging access in condos and apartments as an important solution

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	CITY		AGE				GENDER		HOUSEHOLD INCOME			BORN IN...	
		METRO VAN	GTHA	18-29	30-44	45-59	60+	Male	Female	Less than $50k	$50k to $100k	Over $100k	Canada	Outside of Canada
Government rebates to install a home charger	35%	32%	36%	31%	36%	35%	36%	36%	34%	27%	38%	41%	33%	38%
Sufficient public fast-chargers in your neighborhood	33%	32%	34%	35%	33%	37%	28%	35%	31%	29%	32%	40%	31%	37%
If your condo / apartment building offered EV charging options	27%	31%	25%	31%	32%	24%	22%	26%	28%	31%	29%	20%	25%	30%
Learning that you do not need to make any electrical upgrades	25%	26%	24%	24%	21%	24%	29%	23%	26%	21%	26%	28%	26%	23%
Learning that most drivers only need basic "Level 1" charging at home, using a standard outlet	23%	24%	22%	26%	23%	18%	24%	23%	22%	22%	22%	27%	23%	23%
Other	1%	2%	1%	1%	1%	2%	2%	1%	1%	2%	1%	1%	2%	1%
None of the above	13%	11%	14%	8%	11%	14%	17%	11%	15%	20%	10%	8%	15%	10%

Impact of information and awareness

Abacus data provided respondents with new information and facts about electric vehicles, tested if they had heard it before, inquired whether it changed their perspective, then tested overall interest in heat pumps following receiving this data

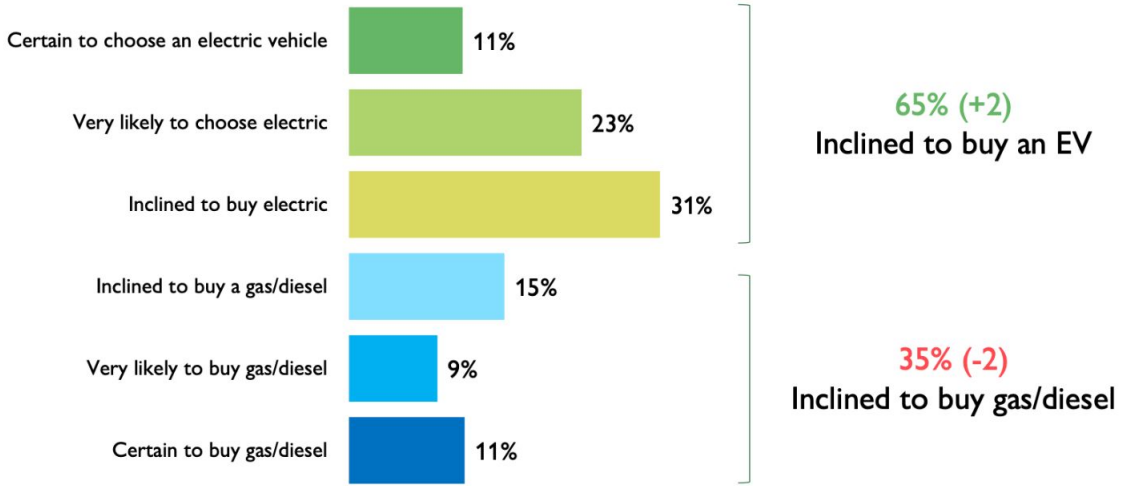
Results

- **EVs have become a better known technology and views are more crystallized than for other technologies. The receipt of new information only makes a minor difference (2-point increase) in intent to purchase.**
- **Of the questions polled, those that participants noted they had not heard previously, and which made them more inclined to purchase were:**
  - 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.
  - FACT: All EVs sold today include a battery warranty of at least eight years and 160,000 kilometres.
  - 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.
- **Educational efforts around EVs could focus on addressing misconceptions about range, battery life, and environmental impact**

Reassessing purchase intent: EVs

More information about EVs has a more minimal impact than other technologies

After receiving information about electric vehicles (EVs), 65% of residents in the GTHA and Metro Vancouver say they would be inclined to purchase an EV, representing a 2-point increase in intent compared to before the information was shared.



Likely Electric Vehicle Adopters: Methodology

- **As part of this research, we re-ran the data to try to pull conclusions about the "next wave of adopters"**
- **This sample excludes: People that already own an EV, have a very negative impression of EVs, and are certain to buy a gas/diesel vehicle as their next vehicle**
  - Sample size: 2104 adult Canadians living in the GTHA and Metro Vancouver
  - Margin of error: +/- 1.79%, 19 times out of 20
  - Survey field dates: November 12, 2024 to January 21, 2025

Key Findings

- **Most results were similar to the full sample.** **Yet the subset was more receptive to EVs: They tended to be less informed and more inclined to buy an EV after learning more**
  - **The barriers remain the same, emphasizing the need to address upfront (87%) and battery replacement costs (85%).** They believe more affordable EV models available in Canada is the best solution to address this.
  - **The subset is already more inclined to purchase an EV (58% -> 63%), and identified more as people who would own an EV.** With receptive groups skewing towards more urban, younger men with children and a higher household income compared to the general population
  - **After learning more about EVs, 71% of the subset became inclined to buy an EV, an 8% increase from before.** Less common EV-interested demographics such as women, renters, people over the age of 60, those with a household income <$50k, and people who do not know anyone with an EV showed the biggest increase in EV purchasing intent.

Detailed findings on heat pump adoption

KEY FINDINGS | HEAT PUMPS

INTEREST IN HEAT PUMPS AND INFORMATION GAPS

19% of homeowners are interested in installing a heat pump in the future, with an additional 25% needing more information. However, knowledge of heat pumps remains relatively low, with less than half of Canadians aware of key facts, such as their efficiency in cold weather or cost benefits compared to gas furnaces. While interest in heat pumps is growing, educating consumers about their benefits and addressing knowledge gaps is essential for increasing adoption.

BARRIERS TO HEAT PUMP INSTALLATION

The primary barriers to installing heat pumps are high installation costs (76%) and the expense of electrical upgrades (72%). Overcoming financial barriers through government rebates and incentives will be crucial to increasing heat pump adoption, especially among those most concerned with upfront costs.

SOLUTIONS TO HEAT PUMP ADOPTION

Respondents suggest that government rebates and educational efforts on lowering energy bills and electrical requirements are key solutions to overcoming heat pump adoption barriers. Addressing cost concerns and providing clear, accessible information on installation and savings potential can help drive greater adoption of heat pumps.

SUPPORT FOR HEAT PUMPS IN NEW CONSTRUCTION

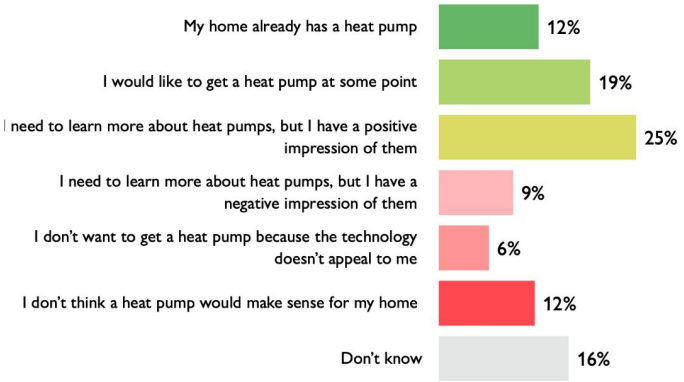
53% of residents in the GTHA and Metro Vancouver believe new buildings should be equipped with heat pumps, while 56% feel that heat pumps should be the default for new construction where applicable. There is strong public support for integrating heat pumps into new buildings, indicating that policy changes requiring their installation could be met with widespread approval.

Over half of homeowners have a heat pump or have a positive impression of them

Information and awareness low: 50% don't yet have a firm opinion

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

Among homeowners, 19% express interest in getting a heat pump in the future, while 25% are interested but need more information.



Heat pump interest: demographic breakdown

Positive impressions stay over 50% for all homeowner demographics, but women in particular have not yet formed a firm view

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	CITY		AGE				GENDER		HOUSEHOLD INCOME			BORN IN…	
		METRO VAN	GTHA	18-29	30-44	45-59	60+	Male	Female	Less than $50k	$50k to $100k	Over $100k	Canada	Outside of Canada
My home already has a heat pump	12%	14%	12%	17%	15%	12%	8%	13%	11%	11%	12%	15%	13%	12%
I would like to get a heat pump at some point	19%	22%	18%	21%	18%	17%	20%	23%	15%	15%	19%	24%	17%	23%
I need to learn more about heat pumps, but I have a positive impression of them	25%	25%	25%	21%	26%	27%	24%	24%	25%	25%	24%	27%	25%	25%
I need to learn more about heat pumps, but I have a negative impression of them	9%	9%	10%	8%	11%	10%	8%	8%	11%	8%	11%	9%	9%	10%
I don't want to get a heat pump because the technology doesn't appeal to me	6%	6%	7%	5%	6%	6%	7%	7%	6%	7%	6%	5%	6%	7%
I don't think a heat pump would make sense for my home	12%	15%	11%	9%	9%	12%	16%	11%	13%	13%	13%	12%	12%	11%
Don't know	16%	11%	18%	18%	14%	16%	17%	13%	19%	20%	15%	8%	18%	12%

Heat pump interest: demographic breakdown

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?

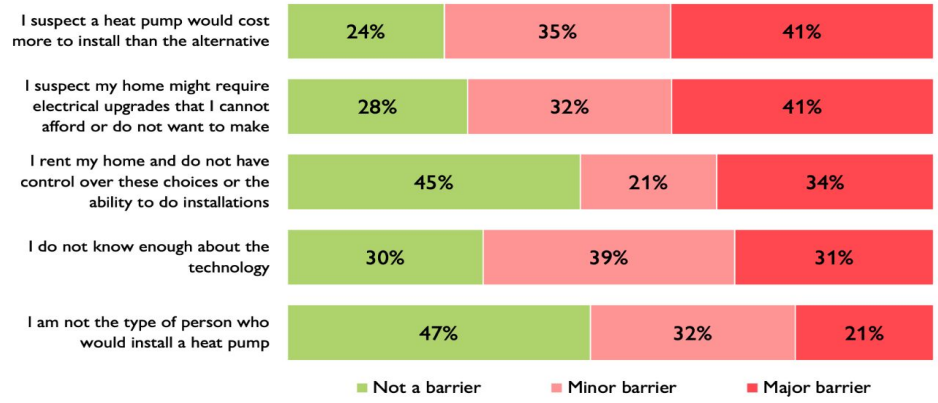
	TOTAL	LANGUAGE		AREA		BUILDING TYPE		HOMEOWNERSHIP		MARTIAL STATUS		CHILDREN U18		COMMUTE FOR WORK	
		ENG	Non-ENG	Urban	Suburban	House	Townhome/ Condo	Owner	Renter	Married	Single	Yes	No	Yes	No
My home already has a heat pump	12%	13%	10%	14%	11%	13%	13%	14%	10%	12%	13%	8%	15%	15%	5%
I would like to get a heat pump at some point	19%	18%	25%	19%	19%	20%	17%	21%	16%	22%	15%	19%	20%	19%	19%
I need to learn more about heat pumps, but I have a positive impression of them	25%	25%	23%	25%	24%	27%	22%	27%	23%	25%	24%	26%	25%	25%	24%
I need to learn more about heat pumps, but I have a negative impression of them	9%	9%	13%	9%	10%	9%	9%	9%	11%	9%	10%	10%	9%	10%	6%
I don't want to get a heat pump because the technology doesn't appeal to me	6%	6%	7%	6%	7%	7%	5%	6%	7%	6%	6%	7%	6%	7%	6%
I don't think a heat pump would make sense for my home	12%	12%	10%	13%	11%	10%	15%	11%	9%	12%	13%	14%	10%	11%	16%
Don't know	16%	17%	12%	14%	18%	14%	20%	12%	24%	15%	19%	16%	16%	14%	24%

Installation and electrical upgrade costs are the primary barriers

but 70% say they do not know enough about the technology

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)

The primary barriers to installing a heat pump relate to installation costs (76%), and costs related to electrical upgrades (73%).



A heat pump works with technology that captures existing heat from the air or ground and transfers it to your home. Heat pumps are extremely energy efficient and can provide both home heating and cooling like an air conditioner. They generally run on electricity.

Barriers to installation: demographic breakdown

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

% Minor + Major barrier	TOTAL	CITY		AGE				GENDER		HOUSEHOLD INCOME			BORN IN…	
		METRO VAN	GTHA	18-29	30-44	45-59	60+	Male	Female	Less than $50k	$50k to $100k	Over $100k	Canada	Outside of Canada
I suspect a heat pump would cost more to install than the alternative	76%	76%	76%	74%	73%	76%	78%	76%	76%	77%	76%	75%	73%	81%
I suspect my home might require electrical upgrades that I cannot afford or do not want to make	72%	74%	71%	74%	71%	74%	71%	70%	75%	73%	74%	68%	71%	75%
I rent my home and do not have control over these choices or the ability to do installations	55%	52%	56%	67%	62%	55%	41%	54%	55%	70%	53%	41%	53%	59%
I do not know enough about the technology	70%	65%	71%	72%	70%	71%	67%	68%	72%	71%	72%	66%	69%	71%
I am not the type of person who would install a heat pump	53%	47%	55%	62%	55%	52%	47%	53%	53%	58%	54%	47%	51%	57%

Barriers to installation: demographic breakdown

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

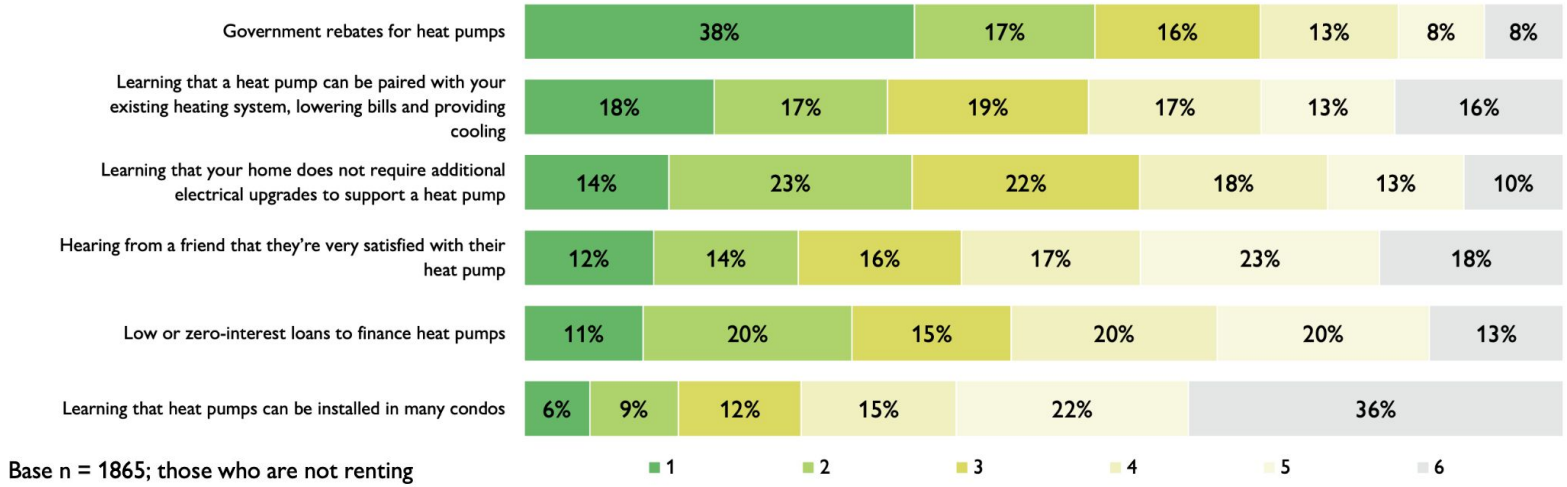
% Minor + Major barrier	TOTAL	LANGUAGE		AREA		BUILDING TYPE		HOMEOWNERSHIP		MARTIAL STATUS		CHILDREN U18		COMMUTE FOR WORK	
		ENG	Non-ENG	Urban	Suburban	House	Townhome/ Condo	Owner	Renter	Married	Single	Yes	No	Yes	No
I suspect a heat pump would cost more to install than the alternative	76%	75%	82%	73%	79%	78%	73%	80%	74%	77%	74%	81%	75%	76%	74%
I suspect my home might require electrical upgrades that I cannot afford or do not want to make	72%	72%	76%	70%	75%	73%	71%	74%	74%	72%	72%	74%	72%	73%	69%
I rent my home and do not have control over these choices or the ability to do installations	55%	55%	52%	59%	49%	44%	68%	39%	84%	46%	64%	39%	58%	58%	46%
I do not know enough about the technology	70%	69%	74%	69%	70%	71%	68%	72%	70%	69%	71%	73%	70%	71%	66%
I am not the type of person who would install a heat pump	53%	53%	55%	54%	52%	52%	55%	54%	58%	51%	55%	46%	56%	55%	47%

Government rebates are a top solution to address barriers

but education was also ranked highly among homeowners

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

When considering ways to address concerns about heat pump installation, respondents highlight government rebates and educational efforts on lowering bills and electrical requirements as the key solutions.



Base n = 1865; those who are not renting

Solutions for homeowners: demographic breakdown

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

CHOOSING A HEAT PUMP: RANK THE FACTORS THAT WOULD ADDRESS YOUR CONCERNS

tel:18-29%2030-44%2045-59

% Rank 1	TOTAL	CITY		AGE				GENDER		HOUSEHOLD INCOME			BORN IN…	
		METRO VAN	GTHA	18-29	30-44	45-59	60+	Male	Female	Less than $50k	$50k to $100k	Over $100k	Canada	Outside of Canada
Government rebates for heat pumps	38%	40%	37%	38%	37%	35%	40%	43%	32%	38%	38%	37%	37%	39%
Learning that a heat pump can be paired with your existing heating system, lowering bills and providing cooling	18%	16%	19%	18%	12%	20%	21%	15%	22%	16%	19%	19%	20%	14%
Learning that your home does not require additional electrical upgrades to support a heat pump	14%	15%	13%	10%	11%	16%	16%	12%	16%	13%	14%	14%	14%	13%
Hearing from a friend that they're very satisfied with their heat pump	12%	9%	14%	18%	18%	11%	7%	13%	12%	11%	13%	13%	11%	15%
Low or zero-interest loans to finance heat pumps	11%	11%	12%	10%	17%	10%	9%	12%	10%	14%	11%	12%	11%	11%
Learning that heat pumps can be installed in many condos	6%	8%	6%	5%	5%	8%	7%	5%	8%	8%	6%	5%	6%	7%

Base n = 1865; those who are not renting

Solutions for homeowners: demographic breakdown

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

CHOOSING A HEAT PUMP: RANK THE FACTORS THAT WOULD ADDRESS YOUR CONCERNS

% Rank 1	TOTAL	LANGUAGE		AREA		BUILDING TYPE		MARTIAL STATUS		CHILDREN U18		COMMUTE FOR WORK	
		ENG	Non-ENG	Urban	Suburban	House	Townhome/ Condo	Married	Single	Yes	No	Yes	No
Government rebates for heat pumps	38%	37%	42%	39%	35%	37%	38%	39%	35%	38%	37%	38%	37%
Learning that a heat pump can be paired with your existing heating system, lowering bills and providing cooling	18%	19%	14%	15%	21%	20%	13%	19%	18%	23%	17%	17%	22%
Learning that your home does not require additional electrical upgrades to support a heat pump	14%	15%	9%	13%	16%	14%	13%	14%	14%	17%	13%	13%	16%
Hearing from a friend that they're very satisfied with their heat pump	12%	12%	16%	12%	13%	13%	10%	11%	15%	8%	15%	13%	10%
Low or zero-interest loans to finance heat pumps	11%	11%	15%	14%	9%	12%	10%	11%	12%	9%	12%	14%	6%
Learning that heat pumps can be installed in many condos	6%	7%	5%	7%	6%	3%	16%	6%	7%	5%	6%	5%	9%

Base n = 1865; those who are not renting

Information and awareness changes minds

Abacus data provided respondents with new information and facts about heat pumps, tested if they had heard this before, inquired whether it changed their perspective, then tested overall interest in heat pumps following receiving this data

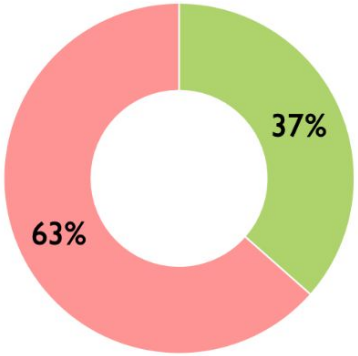
Results:

- **Awareness of key facts about heat pumps is low. Around 60% of respondents indicated the facts were new information**
- **On average, almost 50% of those who did not previously know key facts about heat pumps indicated that the facts would make them more inclined to purchase one**
- **The existence of government rebates and facts about the efficiency of heat pumps compared to gas furnaces were the most persuasive arguments to individuals who had not previously heard these facts**
- **Following receipt of new information, there was an 11-point increase in people inclined to install one at some point**

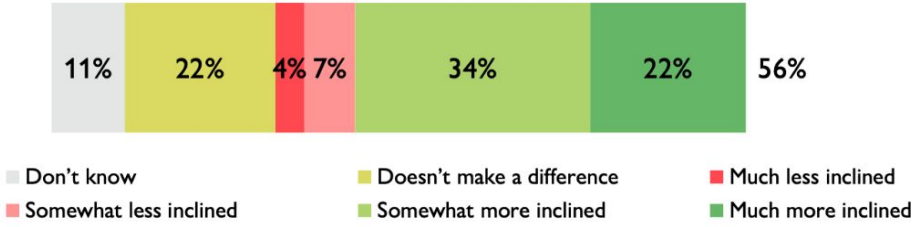
Here are a number of facts about heat pumps. Select all that you previously knew about before this survey.

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

AWARENESS



IMPACT

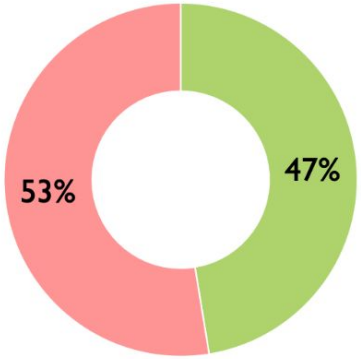


	AWARE OF THIS BEFORE?	
	YES	NO
NET: More inclined	69%	49%
NET: Less inclined	11%	12%
Doesn't make a difference	17%	25%
Don't know	3%	15%

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.

AWARENESS



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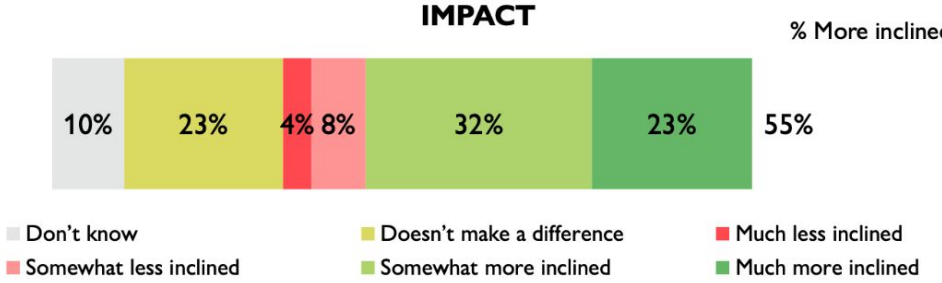
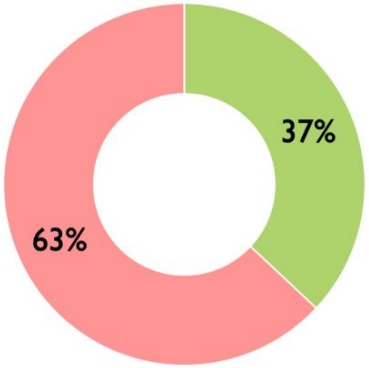


	AWARE OF THIS BEFORE?	
	YES	NO
NET: More inclined	63%	48%
NET: Less inclined	10%	14%
Doesn't make a difference	22%	23%
Don't know	5%	15%

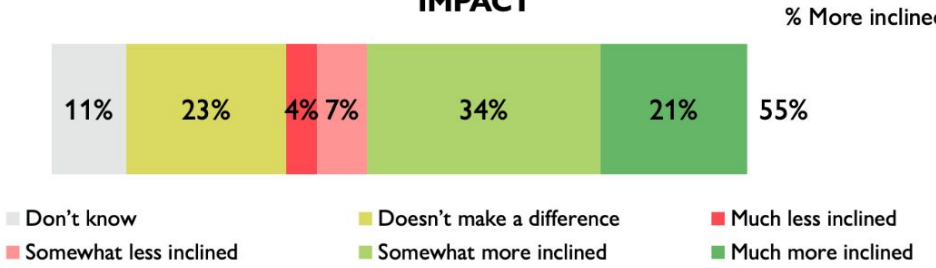
Here are a number of facts about heat pumps. Select all that you previously knew about before this survey.

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.

AWARENESS



IMPACT

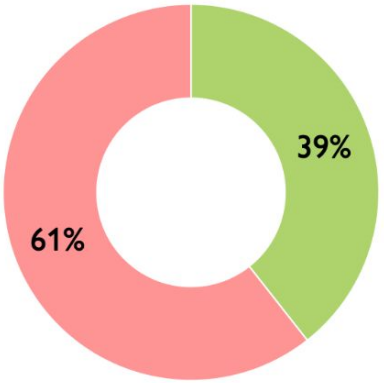


	AWARE OF THIS BEFORE?	
	YES	NO
NET: More inclined	66%	48%
NET: Less inclined	12%	11%
Doesn't make a difference	17%	26%
Don't know	4%	15%

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.

AWARENESS



- I've heard something like this before
- This is new information for me

IMPACT

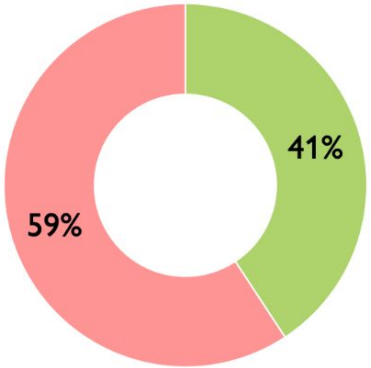
- Don't know
- Doesn't make a difference
- Much less inclined
- Somewhat less inclined
- Somewhat more inclined
- Much more inclined

	AWARE OF THIS BEFORE?	
	YES	NO
NET: More inclined	64%	49%
NET: Less inclined	11%	13%
Doesn't make a difference	20%	25%
Don't know	4%	14%

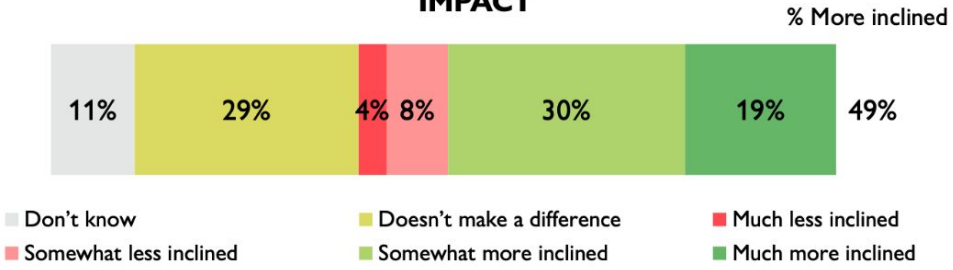
Here are a number of facts about heat pumps. Select all that you previously knew about before this survey.

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

AWARENESS



IMPACT



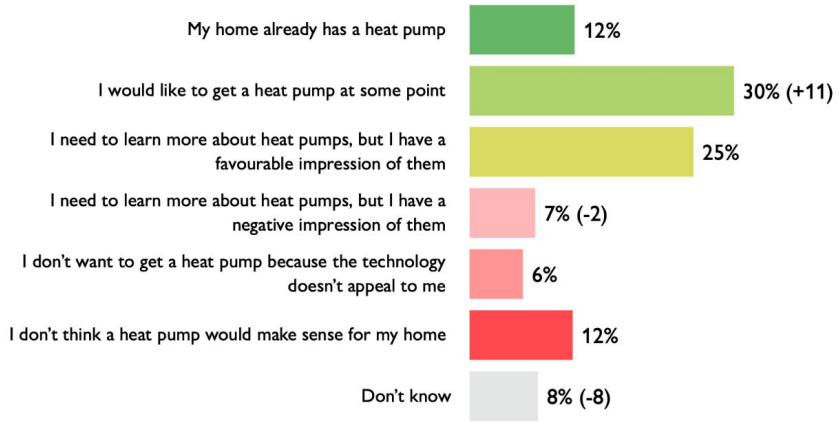
	AWARE OF THIS BEFORE?	
	YES	NO
NET: More inclined	59%	43%
NET: Less inclined	10%	12%
Doesn't make a difference	26%	30%
Don't know	5%	15%

Following receipt of key facts, the number of interested homeowners grew to over half

67% of people then either already have, or are inclined to get a heat pump

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?

After receiving information about heat pumps, 30% of residents say they would like to install one at some point, marking a 11-point increase, while 25% still indicate they need to learn more but have a favorable impression.



Change in perspective: demographic breakdown

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	CITY		AGE				GENDER		HOUSEHOLD INCOME			BORN IN…	
		METRO VAN	GTHA	18-29	30-44	45-59	60+	Male	Female	Less than $50k	$50k to $100k	Over $100k	Canada	Outside of Canada
My home already has a heat pump	12%	14%	11%	18%	18%	10%	8%	13%	11%	10%	12%	13%	13%	9%
I would like to get a heat pump at some point	30%	34%	29%	27%	28%	30%	32%	34%	26%	23%	30%	34%	27%	35%
I need to learn more about heat pumps, but I have a favourable impression of them	25%	23%	26%	23%	23%	28%	26%	23%	28%	22%	24%	28%	26%	25%
I need to learn more about heat pumps, but I have a negative impression of them	7%	8%	7%	14%	11%	5%	5%	7%	8%	8%	7%	7%	6%	10%
I don't want to get a heat pump because the technology doesn't appeal to me	6%	4%	7%	4%	4%	9%	6%	6%	6%	8%	5%	5%	6%	6%
I don't think a heat pump would make sense for my home	12%	13%	11%	8%	9%	11%	14%	11%	12%	19%	12%	8%	12%	11%
Don't know	8%	6%	9%	6%	8%	7%	9%	6%	9%	9%	10%	4%	9%	4%

Change in perspective: demographic breakdown

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	LANGUAGE		AREA		BUILDING TYPE		MARTIAL STATUS		CHILDREN U18		COMMUTE FOR WORK	
		ENG	Non-ENG	Urban	Suburban	House	Townhome/ Condo	Married	Single	Yes	No	Yes	No
My home already has a heat pump	12%	12%	12%	13%	11%	11%	13%	11%	14%	7%	15%	14%	6%
I would like to get a heat pump at some point	30%	30%	33%	31%	29%	30%	29%	32%	25%	30%	31%	30%	30%
I need to learn more about heat pumps, but I have a favourable impression of them	25%	25%	30%	24%	27%	26%	24%	25%	27%	31%	22%	25%	25%
I need to learn more about heat pumps, but I have a negative impression of them	7%	8%	7%	8%	7%	8%	6%	8%	6%	5%	9%	8%	5%
I don't want to get a heat pump because the technology doesn't appeal to me	6%	6%	6%	5%	6%	6%	5%	6%	7%	5%	7%	6%	5%
I don't think a heat pump would make sense for my home	12%	12%	10%	12%	12%	11%	13%	11%	13%	14%	10%	10%	16%
Don't know	8%	8%	4%	7%	8%	7%	9%	7%	10%	8%	6%	6%	12%

Likely Heat Pump Adopters: Methodology

- **As part of this research, we re-ran the data to try to pull conclusions about the "next wave of adopters"**
- **This sample excludes: those who have a very negative impression of heat pumps, already have a heat pump, and don't want to get a heat pump because the technology doesn't appeal to them, and where specified, excludes non-homeowners**
    - Sample size: 1225 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

Key Findings

- **Most results were similar to the full sample: barriers cited are the same (at similar percentages) and upfront cost noted as the top barrier.**
  - **Education will be key to driving adoption, especially for this group who self-report greater positive impact of learning facts.** Only 45% of this "likely adopter" group have formed a firm opinion about the technology, When given further information the number of people interested in a heat pump rose from 25% to 38%.
  - **The gender divide is even more pronounced.** With even more men expressing interest in heat pumps and women disproportionately not yet forming a firm view of this technology.
  - **Building the network effect will be critical, but traditional media matters.** The most influential source of information is "people they know", but news outlets are a more important source of information.

Track the energy transition

Each Monday we publish the Clean Energy Review, a free weekly digest of must-read climate and clean energy stories from across Canada and around the world.

For follow-up questions, contact:

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613-293-9272

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