

A blue electric car is shown from a side profile, parked at a charging station. The car is connected to a charging cable. The background is a bright, hazy sky. The text is overlaid on the image.

Nearly two thirds of Canadians support or somewhat support the proposed 100% tax on Chinese-made electric vehicles.

National survey released September 2024
Field: August 30th to September 2nd, 2024
Submission 2024-2671

THE GLOBE AND MAIL 

 **NANOS**



Nanos was retained by the Globe and Mail to conduct research among Canadians to gauge their views on their priorities in buying electric vehicles, including price, range, and domestic versus international manufacturing. It also explores opinions on paying a premium for Canadian-made EVs, support for a tax on Chinese-made EVs, and the impact of EV origin on purchase decisions.

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1093 Canadians, 18 years of age or older, between August 30th to September 2nd, 2024 as part of an omnibus survey.

The margin of error for this survey is ± 3.0 percentage points, 19 times out of 20.

This study was commissioned by Globe and Mail and the research was conducted by Nanos Research.

KEY FINDINGS

1

CANADIANS OVER TWICE AS LIKELY TO SUPPORT RATHER THAN OPPOSE THE 100% TAX ON ALL CHINESE-MADE ELECTRIC VEHICLES

Over three in five Canadians support (43%) or somewhat support (20%) 100% tax on all Chinese-made electric vehicles, while just over one in four oppose (10%) or somewhat oppose (17%) this. Older Canadians (55 plus) were more likely to support this (52% support, 22% somewhat support) than younger Canadians (18-34)(33% support, 18% somewhat support).

2

CHINESE-MADE ELECTRIC VEHICLES SIX TIMES MORE LIKELY TO HAVE NEGATIVE RATHER THAN POSITIVE IMPACT ON LIKELIHOOD OF PURCHASING

Just over six in ten Canadians say that knowing that an electric vehicle was made in China would make them less likely (48%) or somewhat less likely (13%) to purchase that vehicle. Just under one in ten say this would make them more likely (six per cent) somewhat more likely (three per cent). One quarter say it will have no impact on their likelihood (25%).

3

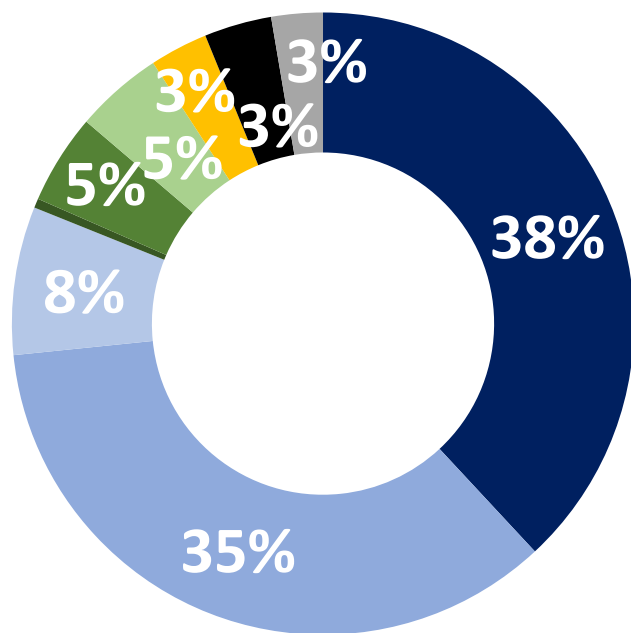
CANADIANS MOST LIKELY TO SAY THEY DO NOT THINK OTHERS WILL WANT TO PAY A PREMIUM FOR A CANADIAN MADE ELECTRIC VEHICLE

Just over four in ten Canadians say they do not think their neighbour would be willing to pay a premium to purchase an electric vehicle if it was made in Canada (43%). Among those who believe their neighbour would pay a premium, the average premium Canadians believe their neighbour would pay is 13% more. Nearly one in two were unsure if their neighbour would pay a premium (48%).

4

OPINIONS ARE SPLIT BETWEEN PRICE AND RANGE ON A SINGLE CHARGE WHEN IT COMES TO BUYING AN ELECTRIC VEHICLE

Just over one third of Canadians (38%) say that price is the most important factor in their purchase decision if they were to buy an electric vehicle, while 35 per cent say range on a single charge is most important. Just under one in ten say that the vehicle being made in Canada is most important (eight per cent).



- Price
- Range of vehicle on a single charge
- Vehicle being made in Canada
- Vehicle being made outside of Canada
- Features of the vehicle
- Would not buy one/prefer hybrid
- Charging infrastructure
- Other
- Unsure

*Weighted to the true population proportion.

*Charts may not add up to 100 due to rounding.

Important factors in buying an electric vehicle

Canadians are split

between price and range of the vehicle on a single charge when it comes to the most important factor when buying an electric vehicle. The vehicle being made in Canada is the most important factor for under one in ten Canadians.

Q – If you were to buy an electric vehicle, what would be the most important factor in your purchase decision? (Select one)[RANDOMIZE]

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, August 30th to September 2nd, 2024, n=1093, accurate 3.0 percentage points plus or minus, 19 times out of 20.

THE GLOBE AND MAIL*



Important factors in buying an electric vehicle – by demographics

Q – If you were to buy an electric vehicle, what would be the most important factor in your purchase decision? (Select one)[RANDOMIZE]

	2023-09 (n=1093)	Atlantic (n=111)	Quebec (n=256)	Ontario (n=360)	Prairies (n=209)	BC (n=157)	Men (n=615)	Women (n=476)	18-34 (n=174)	35-54 (n=409)	55 plus (n=510)
Price	38.1%	37.4%	41.6%	41.1%	34.5%	28.5%	38.2%	38.0%	46.4%	38.3%	32.4%
Range of vehicle on a single charge	35.3%	42.6%	33.0%	32.5%	37.8%	40.0%	37.6%	32.9%	27.7%	37.4%	38.5%
Vehicle being made in Canada	7.7%	3.1%	6.8%	7.9%	7.2%	11.5%	6.1%	9.4%	6.7%	6.2%	9.6%
Features of the vehicle	4.7%	3.1%	5.7%	3.4%	5.2%	6.7%	5.0%	4.2%	4.8%	4.2%	4.9%
Would not buy one/prefer hybrid	4.6%	1.6%	4.1%	4.6%	4.6%	6.7%	5.0%	4.1%	5.2%	4.2%	4.4%
Charging infrastructure	3.0%	5.2%	0.4%	5.7%	1.5%	0.8%	2.6%	3.5%	3.4%	2.7%	3.0%
Operation in cold climate	1.0%	0.7%	-	0.8%	3.7%	-	0.6%	1.4%	1.0%	1.1%	0.9%
Battery life/cost to replace battery	0.7%	2.0%	-	0.5%	0.5%	2.4%	0.7%	0.8%	-	1.4%	0.7%
Vehicle being made outside of Canada	0.5%	-	1.2%	0.3%	0.5%	-	0.3%	0.7%	-	0.5%	0.8%

Top mentions

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, August 30th to September 2nd, 2024, n=1093, accurate 3.0 percentage points plus or minus, 19 times out of 20.

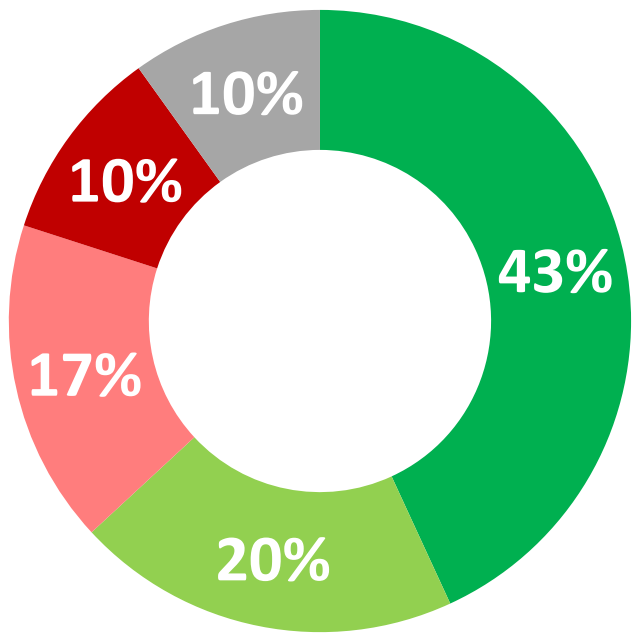
Premium for Canadian-made EVs – by demographics

Q – If your neighbour were to buy an electric vehicle, what premium, if any, would they be willing to pay to buy an electric vehicle made in Canada?

	2023-09 (n=1093)	Atlantic (n=111)	Quebec (n=256)	Ontario (n=360)	Prairies (n=209)	BC (n=157)	Men (n=615)	Women (n=476)	18-34 (n=174)	35-54 (n=409)	55 plus (n=510)
____% higher price for a Canadian electric vehicle (mean)	13.2	8.5	19.7	11.9	8.3	11.9	12.1	16.8	6.0	17.3	13.9
____% higher price for a Canadian electric vehicle (median)	10.0	8.5	15.0	10.0	10.0	10.0	10.0	10.0	5.0	10.0	10.0
Top answers											
10% higher price for a Canadian electric vehicle	1.5%	0.6%	1.7%	1.1%	1.8%	2.4%	1.9%	1.0%	0.6%	1.6%	2.0%
5% higher price for a Canadian electric vehicle	0.8%	-	-	0.8%	1.6%	1.5%	1.5%	-	2.2%	0.2%	0.4%
15% higher price for a Canadian electric vehicle	0.6%	-	1.0%	0.7%	0.3%	-	0.9%	0.2%	-	0.5%	1.0%
Price is not important to my neighbour	5.5%	4.1%	4.2%	7.0%	2.1%	8.4%	4.9%	6.2%	6.0%	4.7%	5.7%
My neighbour would not pay a higher price for a Canadian made electric vehicle	43.2%	35.9%	42.8%	41.9%	50.8%	41.9%	45.8%	40.5%	44.6%	44.4%	41.5%
Unsure	47.8%	58.9%	49.1%	48.1%	43.3%	45.4%	44.2%	51.8%	46.6%	47.8%	48.7%

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, August 30th to September 2nd, 2024, n=1093, accurate 3.0 percentage points plus or minus, 19 times out of 20.

Support for tax on Chinese-made EVs



- Support
- Somewhat support
- Somewhat oppose
- Oppose
- Unsure

Support/Somewhat support	Atlantic (n=111)	Quebec (n=256)	Ontario (n=360)	Prairies (n=209)	BC (n=157)
	59.7%	53.3%	68.2%	60.5%	70.3%
	Men (n=615)	Women (n=476)	18-34 (n=174)	35-54 (n=409)	55 plus (n=510)
	65.5%	60.6%	50.4%	59.9%	74.0%

Oppose/Somewhat oppose	Atlantic (n=111)	Quebec (n=256)	Ontario (n=360)	Prairies (n=209)	BC (n=157)
	27.7%	35.0%	22.7%	26.8%	25.5%
	Men (n=615)	Women (n=476)	18-34 (n=174)	35-54 (n=409)	55 plus (n=510)
	29.3%	24.4%	33.0%	30.2%	20.6%

*Weighted to the true population proportion.
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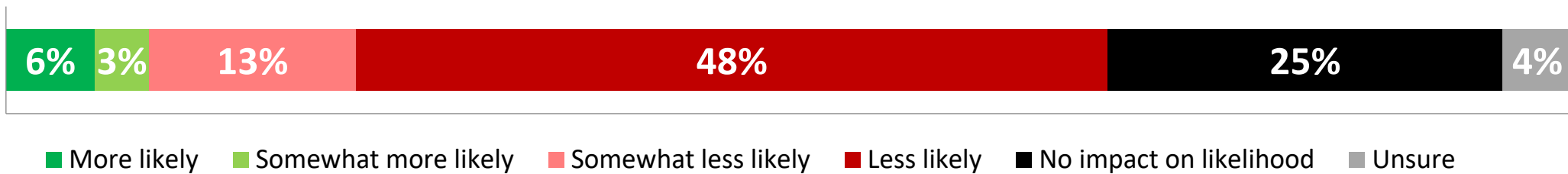
Q – As you may know, in October 2024 the Government of Canada intends to implement a 100 per cent tax on all Chinese-made electric vehicles such as automobiles, trucks, and buses following similar announcements by the US and the European Union. Do you support, somewhat support, somewhat oppose, or oppose this 100% tax on all Chinese-made electric vehicles?

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, August 30th to September 2nd, 2024, n=1093, accurate 3.0 percentage points plus or minus, 19 times out of 20.



Impact of Chinese origin on likelihood to purchase an electric vehicle

Q – Would knowing that an electric vehicle was made in China make you more likely, somewhat more likely, somewhat less likely, less likely or would it have no impact on your likelihood of purchasing the electric vehicle?



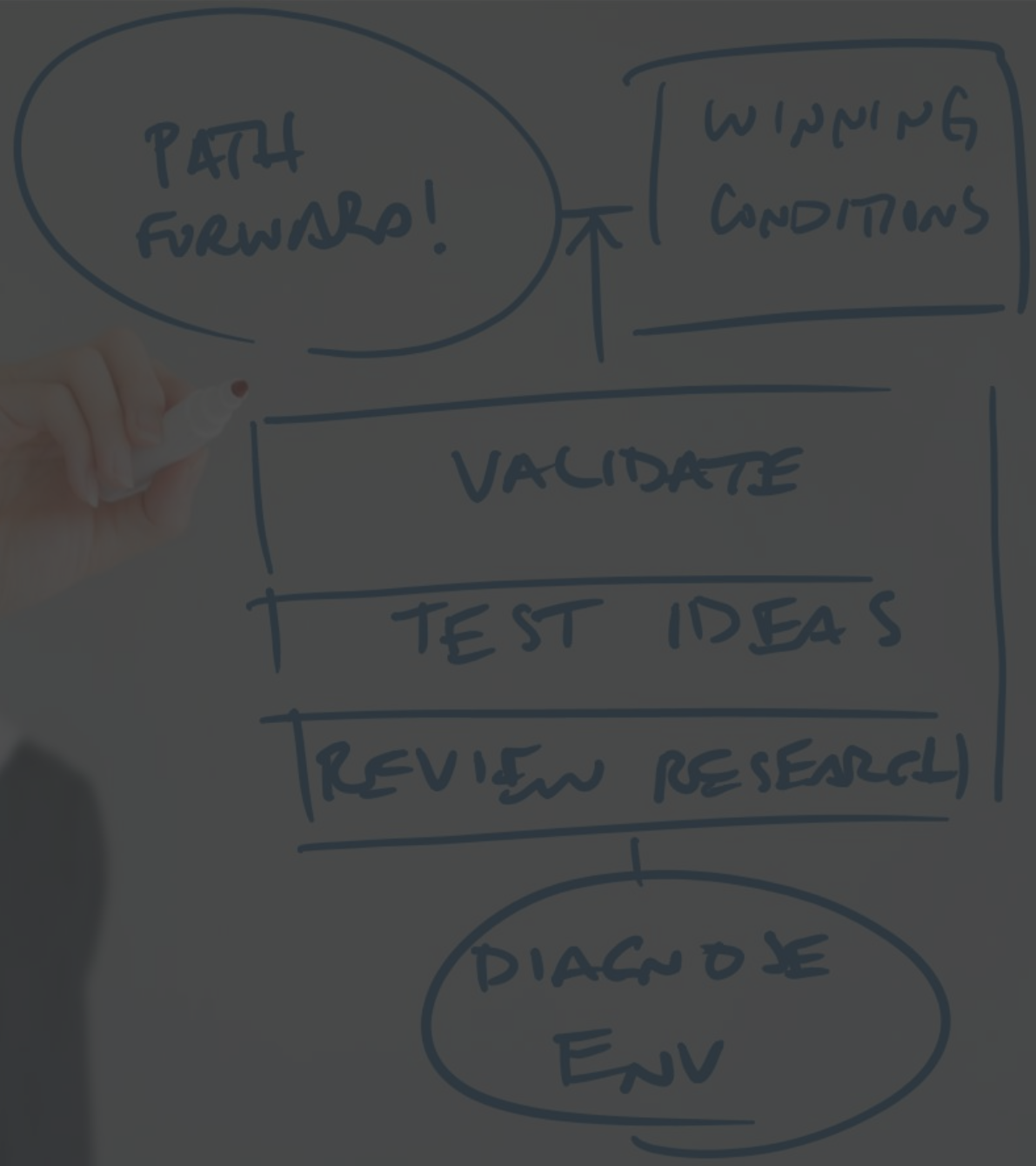
Not likely/Somewhat likely	Atlantic (n=111)	Quebec (n=256)	Ontario (n=360)	Prairies (n=209)	BC (n=157)
	60.3%	50.9%	68.9%	54.1%	66.1%
	Men (n=615)	Women (n=476)	18-34 (n=174)	35-54 (n=409)	55 plus (n=510)
	59.0%	63.6%	54.4%	63.2%	64.0%

No impact on likelihood	Atlantic (n=111)	Quebec (n=256)	Ontario (n=360)	Prairies (n=209)	BC (n=157)
	23.4%	35.1%	18.0%	31.9%	21.4%
	Men (n=615)	Women (n=476)	18-34 (n=174)	35-54 (n=409)	55 plus (n=510)
	26.7%	23.8%	33.4%	22.9%	21.8%

*Weighted to the true population proportion.
 *Charts may not add up to 100 due to rounding.

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, August 30th to September 2nd, 2024, n=1093, accurate 3.0 percentage points plus or minus, 19 times out of 20.

METHODOLOGY



Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1093 Canadians, 18 years of age or older, between August 30th to September 2nd, 2024 as part of an omnibus survey. Participants were randomly recruited by telephone using live agents and administered a survey online. The sample included both land- and cell-lines across Canada. The results were statistically checked and weighted by age and gender using the latest Census information and the sample is geographically stratified to be representative of Canada.

Individuals randomly called using random digit dialling with a maximum of five call backs.

The margin of error for this survey is ± 3.0 percentage points, 19 times out of 20.

This study was commissioned by the Globe and Mail and the research was conducted by Nanos Research.

Note: Charts may not add up to 100 due to rounding

Element	Description	Element	Description
Research sponsor	The Globe and Mail	Weighting of Data	The results were weighted by age and gender using the latest Census information (2021) and the sample is geographically stratified to ensure a distribution across all regions of Canada. See tables for full weighting disclosure
Population and Final Sample Size	1093 Randomly selected individuals.	Screening	Screening ensured potential respondents did not work in the market research industry, in the advertising industry, in the media or a political party prior to administering the survey to ensure the integrity of the data.
Source of Sample	Nanos Hybrid Panel	Excluded Demographics	Individuals younger than 18 years old; individuals without land or cell lines, and individuals without internet access could not participate.
Type of Sample	Probability	Stratification	By age and gender using the latest Census information (2021) and the sample is geographically stratified to be representative of Canada. Smaller areas such as Atlantic Canada were marginally oversampled to allow for a minimum regional sample.
Margin of Error	±3.0 percentage points, 19 times out of 20.	Estimated Response Rate	14 percent, consistent with industry norms.
Mode of Survey	RDD dual frame (land- and cell-lines) hybrid telephone and online omnibus survey	Question Order	Question order in the preceding report reflects the order in which they appeared in the original questionnaire.
Sampling Method Base	The sample included both land- and cell-lines RDD (Random Digit Dialed) across Canada.	Question Content	Topics on the omnibus ahead of the survey content included: views on political issues, views on economic issues, and views on immigration.
Demographics (Captured)	Atlantic Canada, Quebec, Ontario, Prairies, British Columbia; Men and Women; 18 years and older. Six digit postal code was used to validate geography.	Question Wording	The questions in the preceding report are written exactly as they were asked to individuals.
Fieldwork/Validation	Individuals were recruited using live interviews with live supervision to validate work, the research questions were administered online	Research/Data Collection Supplier	Nanos Research
Number of Calls	Maximum of five call backs to those recruited.	Contact	Contact Nanos Research for more information or with any concerns or questions. http://www.nanos.co Telephone:(613) 234-4666 ext. 237 Email: info@nanosresearch.com.
Time of Calls	Individuals recruited were called between 12-5:30 pm and 6:30-9:30pm local time for the respondent.	Tabulations	By age, gender and region
Field Dates	August 30 th to September 2 nd , 2024.		
Language of Survey	The survey was conducted in both English and French.		
Standards	Nanos Research is a member of the Canadian Research Insights Council (CRIC) and confirms that this research fully complies with all CRIC Standards including the CRIC Public Opinion Research Standards and Disclosure Requirements. https://canadianresearchinsightscouncil.ca/standards/		



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Any questions?



Nanos Research

(613) 234-4666, ext. 237

ea@nanosresearch.com

For more information on the firm, please visit www.nanos.co



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