



Majority of Canadians believe the zero-emission vehicle mandate targets are unreasonable to one extent or another.

The research gauged the opinions among Canadians on their level of awareness of the zero-emission vehicle mandate re-confirmed by the Government of Canada and their plans on purchasing a future vehicle.

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,028 Canadians, 18 years of age or older, between August 30<sup>th</sup> and September 3<sup>rd</sup>, 2025 as part of an omnibus survey.

The margin of error for this survey is  $\pm 3.1$  percentage points, 19 times out of 20.

The statistical tabulations including the unweighted and weighted number of interviews can be accessed [here](#).

The research was commissioned by C.D. Howe and was conducted by Nanos Research.

# KEY FINDINGS

1

## **JUST OVER THREE IN FIVE CANADIANS SAY THE ZERO-EMISSION VEHICLE MANDATE IS UNREASONABLE/SOMEWHAT UNREASONABLE**

[Sixty-one per cent of Canadians](#) say they believe that the zero-emission vehicle mandate targets are unreasonable/somewhat unreasonable. Meanwhile, close to two in five Canadians ([39%](#)) say the mandate targets are reasonable/somewhat reasonable. Residents in Quebec ([49%](#)) are more likely to say that the mandate targets are reasonable/somewhat reasonable than residents in the Atlantic ([29%](#)).

2

## **CANADIANS MOST LIKELY TO SAY THE MANDATE TARGETS SHOULD BE REDUCED, WITH MORE TIME TO PHASE IN ZERO-EMISSION VEHICLES**

When asked Canadians if they believe the mandate targets electric or hybrid plug-in passenger vehicles, SUVs and light-duty trucks sold in Canada to be 20 percent of all sales by 2026 rising to 100 sales, two in five ([40%](#)) Canadians say they should be reduced, with more time to phase in zero-emission electric and hybrid plug-in vehicles. Almost one in three ([29%](#)) say it should be eliminated completely and one in four ([25%](#)) say it should stay the same. Residents in Quebec ([50%](#)) are more likely to say it should be reduced, with more time to phase in zero-emission electric and hybrid plug-in vehicles than residents in the Prairies ([28%](#)). Residents aged 55 plus ([47%](#)) are more likely to say this than residents aged 18-34 ([33%](#)).

3

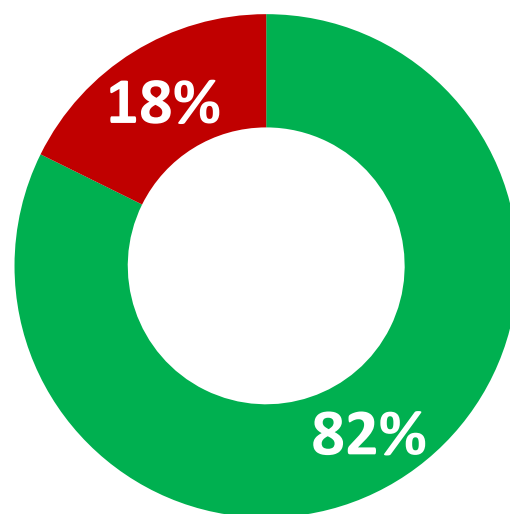
## **CANADIANS ARE SPLIT ON PLANNED NEXT VEHICLE PURCHASE TO BE A FULL ELECTRIC OR PLUG-IN HYBRID ZERO EMISSION VEHICLE**

Half of Canadians planning to purchase a vehicle in the next six years ([49%](#)) say they are not likely/somewhat not likely to purchase a full electric or plug-in hybrid zero emission vehicle as their next vehicle purchase. On the other side, close to one in two Canadians ([47%](#)) say they are likely/somewhat likely to purchase a full electric or plug-in hybrid zero emission vehicle as their next vehicle purchase. When asked their opinion, almost one in two ([20%](#)) said due to Insufficient/concern over Charging Infrastructure/concern about range, followed by high cost of vehicles ([16%](#)) and to reduce fossil fuel consumption, protect the environment ([10%](#)).

# Awareness of zero-emission vehicle mandate

The Government of Canada recently re-confirmed its zero-emission vehicle (ZEV) mandate. This mandate requires a certain percentage of passenger vehicles, SUVs and light-duty trucks sold in Canada to be either fully electric or plug-in hybrids, with these vehicles representing 20 percent of sales in 2026 and rising to 100 percent of sales in 2035.

Q – Prior to today were you aware or unaware of this mandate?



■ Aware of mandate

■ Not aware of mandate

## Just over 4 in 5 Canadians

say they are aware (82%) of the mandate.

Canadians aged 55 plus (87%) are more likely to say they are aware of the mandate than Canadians aged 18-34 (75%).

\*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 30<sup>th</sup> to September 3<sup>rd</sup>, 2025, n=1028, accurate 3.1 percentage points plus or minus, 19 times out of 20.

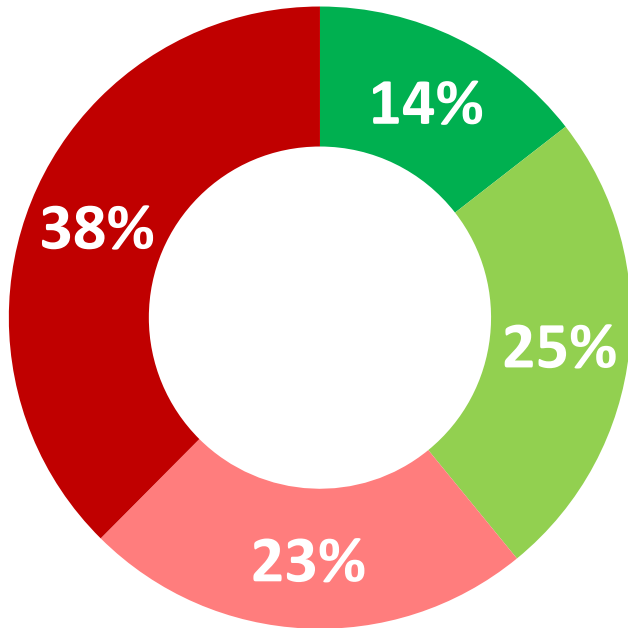
## Awareness of zero-emission vehicle mandate – By demographics

The Government of Canada recently re-confirmed its zero-emission vehicle (ZEV) mandate. This mandate requires a certain percentage of passenger vehicles, SUVs and light-duty trucks sold in Canada to be either fully electric or plug-in hybrids, with these vehicles representing 20 percent of sales in 2026 and rising to 100 percent of sales in 2035.

Q – Prior to today were you aware or unaware of this mandate?

|                      | 2025-09<br>(n=1028) | Atlantic<br>(n=107) | Quebec<br>(n=190) | Ontario<br>(n=360) | Prairies<br>(n=213) | BC<br>(n=158) | Men<br>(n=537) | Women<br>(n=491) | 18-34<br>(n=194) | 35-54<br>(n=397) | 55 plus<br>(n=437) |
|----------------------|---------------------|---------------------|-------------------|--------------------|---------------------|---------------|----------------|------------------|------------------|------------------|--------------------|
| Aware of mandate     | 82.3%               | 70.3%               | 76.5%             | 84.6%              | 83.3%               | 90.2%         | 87.5%          | 77.3%            | 75.0%            | 82.7%            | 86.8%              |
| Not aware of mandate | 17.7%               | 29.7%               | 23.5%             | 15.4%              | 16.7%               | 9.8%          | 12.5%          | 22.7%            | 25.0%            | 17.3%            | 13.2%              |

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, August 30<sup>th</sup> to September 3<sup>rd</sup>, 2025, n=1028, accurate 3.1 percentage points plus or minus, 19 times out of 20.



- Reasonable
- Somewhat reasonable
- Somewhat unreasonable
- Unreasonable

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

Q – Do you believe these targets are reasonable, somewhat reasonable, somewhat unreasonable or unreasonable?

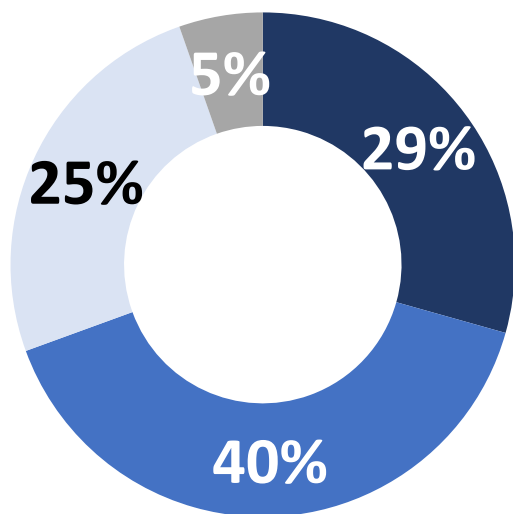
# Views on mandate targets

| Reasonable/Somewhat reasonable     | Atlantic (n=107) | Quebec (n=190) | Ontario (n=360)  | Prairies (n=213) | BC (n=158)      |
|------------------------------------|------------------|----------------|------------------|------------------|-----------------|
|                                    | 29.4%            | 49.2%          | 38.6%            | 29.8%            | 40.1%           |
| Unreasonable/Somewhat unreasonable | Men (n=537)      | Women (n=491)  | 18 to 34 (n=194) | 35 to 54 (n=397) | 55 plus (n=437) |
|                                    | 37.8%            | 40.3%          | 47.2%            | 32.1%            | 39.3%           |
| Unreasonable/Somewhat unreasonable | Atlantic (n=107) | Quebec (n=190) | Ontario (n=360)  | Prairies (n=213) | BC (n=158)      |
|                                    | 70.6%            | 50.8%          | 61.4%            | 70.2%            | 59.9%           |
| Unreasonable/Somewhat unreasonable | Men (n=537)      | Women (n=491)  | 18 to 34 (n=194) | 35 to 54 (n=397) | 55 plus (n=437) |
|                                    | 62.2%            | 59.7%          | 52.8%            | 67.9%            | 60.7%           |

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, August 30<sup>th</sup> to September 3<sup>rd</sup>, 2025, n=1028, accurate 3.1 percentage points plus or minus, 19 times out of 20.

## Belief in the mandate targets to be 20 per cent by 2026 rising to 100 sales

Q – Do you believe the mandate targets electric or hybrid plug-in passenger vehicles, SUVs and light-duty trucks sold in Canada to be 20 percent of all sales by 2026 rising to 100 sales should be:



■ Eliminated completely

■ Reduced, with more time to phase in zero-emission electric and hybrid plug-in vehicles

■ Stay the same

■ Not sure

\*Weighted to the true population proportion.

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

## 2 in 5 Canadians

say the mandate should be reduced, with more time to phase in zero-emission electric and hybrid plug-in vehicles (40%).

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, August 30<sup>th</sup> to September 3<sup>rd</sup>, 2025, n=1028, accurate 3.1 percentage points plus or minus, 19 times out of 20.

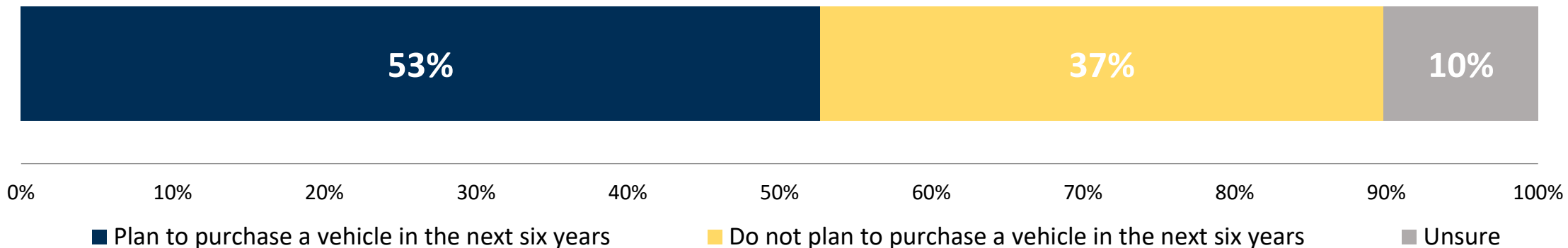
# Belief in the mandate targets to be 20 per cent by 2026 rising to 100 sales – By demographics

Q – Do you believe the mandate targets electric or hybrid plug-in passenger vehicles, SUVs and light-duty trucks sold in Canada to be 20 percent of all sales by 2026 rising to 100 sales should be:

|                                                                                        | 2025-09<br>(n=1028) | Atlantic<br>(n=107) | Quebec<br>(n=190) | Ontario<br>(n=360) | Prairies<br>(n=213) | BC<br>(n=158) | Men<br>(n=537) | Women<br>(n=491) | 18-34<br>(n=194) | 35-54<br>(n=397) | 55 plus<br>(n=437) |
|----------------------------------------------------------------------------------------|---------------------|---------------------|-------------------|--------------------|---------------------|---------------|----------------|------------------|------------------|------------------|--------------------|
| Reduced, with more time to phase in zero-emission electric and hybrid plug-in vehicles | 40.1%               | 45.7%               | 49.5%             | 41.6%              | 28.1%               | 32.3%         | 37.4%          | 42.6%            | 32.9%            | 37.5%            | 46.7%              |
| Eliminated completely                                                                  | 29.4%               | 20.5%               | 15.3%             | 30.3%              | 48.8%               | 30.0%         | 34.8%          | 24.1%            | 27.3%            | 36.2%            | 25.4%              |
| Stay the same                                                                          | 25.2%               | 20.7%               | 31.0%             | 23.4%              | 18.5%               | 31.1%         | 24.6%          | 25.7%            | 32.0%            | 23.9%            | 21.8%              |
| Unsure                                                                                 | 5.4%                | 13.1%               | 4.2%              | 4.7%               | 4.5%                | 6.6%          | 3.1%           | 7.5%             | 7.8%             | 2.4%             | 6.1%               |

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, August 30<sup>th</sup> to September 3<sup>rd</sup>, 2025, n=1028, accurate 3.1 percentage points plus or minus, 19 times out of 20.

# Plans to purchase a vehicle in the next six years



|                                                         | 2025-09<br>(n=1028) | Atlantic<br>(n=107) | Quebec<br>(n=190) | Ontario<br>(n=360) | Prairies<br>(n=213) | BC<br>(n=158) | Men<br>(n=537) | Women<br>(n=491) | 18-34<br>(n=194) | 35-54<br>(n=397) | 55 plus<br>(n=437) |
|---------------------------------------------------------|---------------------|---------------------|-------------------|--------------------|---------------------|---------------|----------------|------------------|------------------|------------------|--------------------|
| Plan to purchase a vehicle in the next six years        | 52.7%               | 60.1%               | 49.2%             | 53.9%              | 51.8%               | 52.5%         | 59.1%          | 46.4%            | 56.9%            | 60.3%            | 43.9%              |
| Do not plan to purchase a vehicle in the next six years | 37.2%               | 26.0%               | 44.5%             | 35.8%              | 33.6%               | 38.5%         | 33.5%          | 40.7%            | 35.5%            | 30.0%            | 43.8%              |
| Unsure                                                  | 10.2%               | 13.9%               | 6.3%              | 10.2%              | 14.7%               | 9.0%          | 7.4%           | 12.9%            | 7.6%             | 9.6%             | 12.3%              |

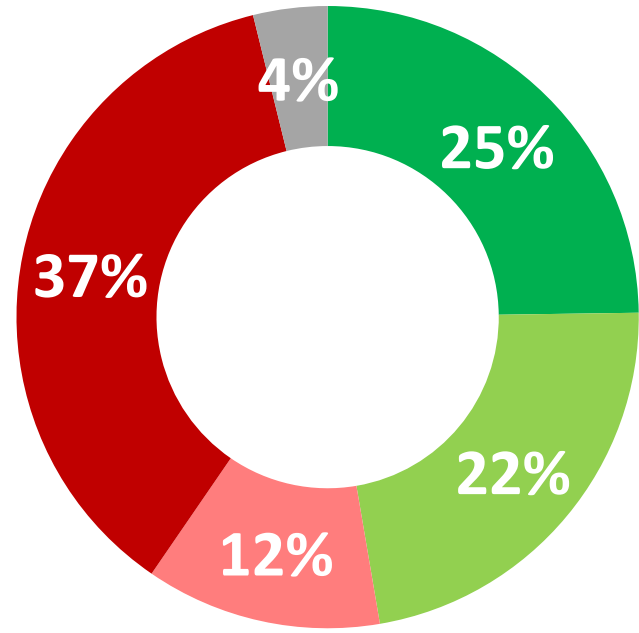
\*Weighted to the true population proportion.

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

Q – Please tell us about your future vehicle plans. Do you plan or not plan to purchase a vehicle in the next six years?

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, August 30<sup>th</sup> to September 3<sup>rd</sup>, 2025, n=1028, accurate 3.1 percentage points plus or minus, 19 times out of 20.





■ Likely
 ■ Somewhat likely  
■ Somewhat not likely
 ■ Not likely  
■ Unsure

\*Weighted to the true population proportion.

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

## Likelihood to purchase a full electric or plug-in hybrid Zero Emission Vehicle

| Likely/Somewhat likely         | Atlantic<br>(n=63) | Quebec<br>(n=96) | Ontario<br>(n=195)  | Prairies<br>(n=111) | BC<br>(n=81)       |
|--------------------------------|--------------------|------------------|---------------------|---------------------|--------------------|
|                                | 28.1%              | 69.1%            | 42.5%               | 35.0%               | 53.0%              |
| Likely/Somewhat likely         | Men<br>(n=317)     | Women<br>(n=229) | 18 to 34<br>(n=110) | 35 to 54<br>(n=239) | 55 plus<br>(n=197) |
|                                | 47.3%              | 47.4%            | 56.8%               | 42.0%               | 45.0%              |
| Not likely/Somewhat not likely | Atlantic<br>(n=63) | Quebec<br>(n=96) | Ontario<br>(n=195)  | Prairies<br>(n=111) | BC<br>(n=81)       |
|                                | 67.0%              | 29.4%            | 52.6%               | 63.9%               | 39.7%              |
| Not likely/Somewhat not likely | Men<br>(n=317)     | Women<br>(n=229) | 18 to 34<br>(n=110) | 35 to 54<br>(n=239) | 55 plus<br>(n=197) |
|                                | 50.6%              | 46.7%            | 39.1%               | 54.2%               | 51.3%              |

Q – [IF PLANS TO BUY A VEHICLE IN THE NEXT SIX YEARS] Is your planned next vehicle purchase likely, somewhat likely, somewhat unlikely or unlikely be a full electric or plug-in hybrid Zero Emission Vehicle?

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, August 30<sup>th</sup> to September 3<sup>rd</sup>, 2025, n=546 Canadians who plan on purchasing a vehicle in the next six years, accurate 4.2 percentage points plus or minus, 19 times out of 20.

# Views on planned next vehicle purchase

Q – Why do you have that opinion? [OPEN]

| TOP RESPONSES |                                                                       | 2025-09<br>(n=471) | Atlantic<br>(n=55) | Quebec<br>(n=78) | Ontario<br>(n=170) | Prairies<br>(n=95) | BC<br>(n=73) | Men<br>(n=270) | Women<br>(n=201) | 18-34<br>(n=84) | 35-54<br>(n=205) | 55 plus<br>(n=182) |
|---------------|-----------------------------------------------------------------------|--------------------|--------------------|------------------|--------------------|--------------------|--------------|----------------|------------------|-----------------|------------------|--------------------|
|               | Insufficient/concern over Charging Infrastructure/concern about range | 19.6%              | 17.8%              | 24.0%            | 16.6%              | 23.5%              | 18.2%        | 17.4%          | 22.2%            | 17.5%           | 16.5%            | 24.2%              |
|               | High Cost of Electric Vehicles                                        | 16.2%              | 32.4%              | 13.4%            | 14.7%              | 16.6%              | 14.6%        | 15.8%          | 16.5%            | 19.0%           | 18.0%            | 12.3%              |
|               | To reduce fossil fuel consumption, protect the environment            | 10.4%              | 8.5%               | 16.6%            | 7.3%               | 9.6%               | 12.4%        | 8.8%           | 12.3%            | 8.5%            | 9.9%             | 12.2%              |
|               | Preference for Hybrid Vehicles                                        | 9.8%               | 7.9%               | 5.7%             | 11.5%              | 6.5%               | 15.6%        | 9.4%           | 10.4%            | 16.9%           | 8.4%             | 6.3%               |
|               | Poor Performance in Cold Weather                                      | 9.1%               | 11.1%              | 1.0%             | 10.2%              | 18.4%              | 5.3%         | 10.4%          | 7.4%             | 5.1%            | 11.5%            | 9.3%               |
|               | Support for Transition to Electric Vehicles/It's the future           | 7.2%               | 1.4%               | 12.7%            | 7.3%               | 4.6%               | 5.2%         | 8.1%           | 6.0%             | 2.9%            | 6.9%             | 10.3%              |
|               | I already have an EV/am currently looking to buy one                  | 5.8%               | 1.8%               | 16.2%            | 3.5%               | 0.6%               | 5.6%         | 7.6%           | 3.6%             | 8.0%            | 5.8%             | 4.3%               |
|               | It's cheaper/Tired of paying for gas                                  | 4.2%               | 3.7%               | 4.6%             | 4.7%               | 0.6%               | 7.1%         | 4.5%           | 4.0%             | 6.3%            | 3.7%             | 3.4%               |
|               | Environmental and Sustainability Concerns of EV                       | 4.1%               | 1.4%               | 1.0%             | 6.8%               | 3.4%               | 3.5%         | 3.2%           | 5.2%             | 2.7%            | 6.0%             | 3.2%               |

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, August 30<sup>th</sup> to September 3<sup>rd</sup>, 2025, n=471 Canadians who plan on purchasing a vehicle in the next six years, accurate 4.6 percentage points plus or minus, 19 times out of 20.

# Views on planned next vehicle purchase - Likelihood

|               |                                                                       | 2025-09<br>(n=471) | Likely<br>(n=107) | Somewhat<br>likely (n=97) | Somewhat not<br>likely (n=59) | Not likely<br>(n=191) | Unsure<br>(n=17)* |
|---------------|-----------------------------------------------------------------------|--------------------|-------------------|---------------------------|-------------------------------|-----------------------|-------------------|
| TOP RESPONSES | Insufficient/concern over Charging Infrastructure/concern about range | 19.6%              | 4.1%              | 13.3%                     | 29.7%                         | 28.1%                 |                   |
|               | High Cost of Electric Vehicles                                        | 16.2%              | 2.7%              | 13.1%                     | 42.7%                         | 16.3%                 |                   |
|               | To reduce fossil fuel consumption, protect the environment            | 10.4%              | 28.9%             | 15.4%                     | 1.6%                          | -                     |                   |
|               | Preference for Hybrid Vehicles                                        | 9.8%               | 11.4%             | 20.4%                     | 3.0%                          | 5.6%                  |                   |
|               | Poor Performance in Cold Weather                                      | 9.1%               | -                 | 3.6%                      | 6.0%                          | 18.7%                 |                   |
|               | Support for Transition to Electric Vehicles/It's the future           | 7.2%               | 17.9%             | 11.2%                     | 1.6%                          | 0.7%                  |                   |
|               | I already have an EV/am currently looking to buy one                  | 5.8%               | 19.7%             | 5.1%                      | -                             | -                     |                   |
|               | It's cheaper/Tired of paying for gas                                  | 4.2%               | 10.9%             | 7.6%                      | -                             | -                     |                   |
|               | Environmental and Sustainability Concerns of EV                       | 4.1%               | 0.9%              | 1.0%                      | 4.7%                          | 8.1%                  |                   |

\*Note: Data for samples n=30 have been suppressed.

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, August 30<sup>th</sup> to September 3<sup>rd</sup>, 2025, n=471 Canadians who plan on purchasing a vehicle in the next six years, accurate 4.6 percentage points plus or minus, 19 times out of 20.



Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,028 Canadians, 18 years of age or older, between August 30<sup>th</sup> and September 3<sup>rd</sup>, 2025, as part of an omnibus survey. Participants were randomly recruited by telephone using live agents and administered a survey online. 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 were randomly called using random digit dialing with a maximum of five call backs.

The margin of error for a random survey of 1,028 Canadians is  $\pm 3.1$  percentage points, 19 times out of 20.

The research was commissioned by C.D. Howe and was conducted by Nanos Research.

**Full data tables with weighted and unweighted number of interviews are [here](#).**

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



| Element                          | Description                                                                                                                                                                                                                                                                                                                                                       | Element                           | Description                                                                                                                                                                                                                                                                                              |
|----------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Research sponsor                 | C.D. Howe                                                                                                                                                                                                                                                                                                                                                         | 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 | 1,028 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 Probability 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 Atlantic Canada, Quebec, Ontario, Prairies, British Columbia. Smaller areas such as Atlantic Canada were marginally oversampled to allow for a minimum regional sample. |
| Margin of Error                  | ±3.1 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                    | This was the only question asked on this topic.                                                                                                                                                                                                                                                          |
| 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, views on helping Ukraine, views on Canada-US tariffs issues and Canada-China trade relationship, views on Government spending and views on the standard of living.                      |
| Demographics (Captured)          | Atlantic Canada, Quebec, Ontario, Prairies, British Columbia; Men and Women; 18 years and older.<br>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.<br><a href="http://www.nanos.co">http://www.nanos.co</a><br>Telephone:(613) 234-4666 ext. 237<br>Email: <a href="mailto:info@nanosresearch.com">info@nanosresearch.com</a> .                                              |
| Time of Calls                    | Individuals recruited were called between 12-5:30 pm and 6:30-9:30pm local time for the respondent.                                                                                                                                                                                                                                                               | Data Tables                       | <a href="#">By region, age and gender</a>                                                                                                                                                                                                                                                                |
| Field Dates                      | August 30 <sup>th</sup> to September 3 <sup>rd</sup> , 2025.                                                                                                                                                                                                                                                                                                      |                                   |                                                                                                                                                                                                                                                                                                          |
| 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.<br><a href="https://canadianresearchinsightscouncil.ca/standards/">https://canadianresearchinsightscouncil.ca/standards/</a> |                                   |                                                                                                                                                                                                                                                                                                          |



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# Any questions?

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