



**accelerate**  
Canada's ZEV Supply Chain Alliance

# PUBLIC VIEWS ABOUT THE ZEV SUPPLY CHAIN

Report  
June 2025

**ENVIRONICS**  
RESEARCH



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# **Accelerate ZEV, Canada's ZEV industrial alliance, wants to understand what Canadians know and think about the emerging ZEV industry.**

This report provides a snapshot of public opinion, to inform strategy and communications efforts that will help the public understand the value of the ZEV industry for Canada.

# RESEARCH METHODS

**This report is based on an online survey conducted with a representative sample of 2,039 Canadians (18 or older), from May 14 to 23, 2025.**

The sample was drawn from an online panel and stratified by province to ensure adequate subsamples for analysis of smaller regions. Quotas were also used to ensure the sample was representative by age, gender and household income. At the analysis stage, the data were weighted to ensure the final sample reflects the actual distribution of the Canadian population per 2021 Census data. The survey used a non-probability sample, which means no margin of sampling error can be calculated.

	Total	BC	AB	SK/MB	ON	QC	ATL
Sample size (unweighted/actual)	2,039	307	282	254	518	387	291
Sample size (weighted)	2,039	276	235	137	787	470	133
Population (%) per Census	100%	14%	12%	7%	39%	23%	2%

NOTE:

- Results in this report may not add to 100% due to rounding or multiple responses.
- All results are based on the entire sample unless otherwise noted.
- *Data labels for values less than 4% may not be shown on some charts.*

# EXECUTIVE SUMMARY

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*The results reveal that public sentiment about an EV industry is still emerging. Canadians are receptive to EV industries and a domestic EV supply chain to address Canada's current economic challenges. Yet they have a limited understanding of what this entails and thus tend to approach it with a broadly optimistic outlook rather than strong conviction about the level of investment required from Canada.*

1

## **Depth of support across EV-related industries**

Public support is broad across all seven EV-related industries presented in the survey. Between 66 and 78 percent support industries ranging from critical minerals to final EV assembly. Strong support is around one in three. There are no standout sectors (critical mineral mining and processing is not viewed considerably differently) and there is limited recognition of real growth in any of them.

2

## **Lack of a clear EV supply chain vision**

Most Canadians do not see a cohesive national EV supply chain (just three in ten see real progress) and two-thirds believe we are falling behind the international leaders. Many agree building an EV supply chain should be an investment priority for Canada (70%) and support reduced government barriers (62%).

# EXECUTIVE SUMMARY (CONT'D)

3

## **Optimism without true understanding**

While Canadians are generally supportive, they lack a strong grasp of what building an EV supply chain entails. They see national and provincial benefits such as job creation and reduced dependence on countries like the U.S, but few foresee local benefits. Limited understanding of the barriers may dampen support for solutions, and a majority (58%) say it is unacceptable if it leads to higher vehicle prices.

4

## **Mix of messaging needed**

No single message landed as the most convincing reason to support an EV supply chain, although economic growth and national security reasons marginally outweigh appeals to environmental leadership and community revitalization. A mix of messages will likely be needed to address knowledge gaps and align with diverse social values.

5

## **Notable differences by region, age and political support**

- ON and QC residents (likely because of their proximity to the auto sector) and younger Canadians (under 30) tend to be more aligned with EV supply chain growth and potential
- Albertans and Conservative voters express less support for EV-linked industries compared to other Canadians, yet similar (or greater) support for critical minerals, suggesting polarization of the issues.

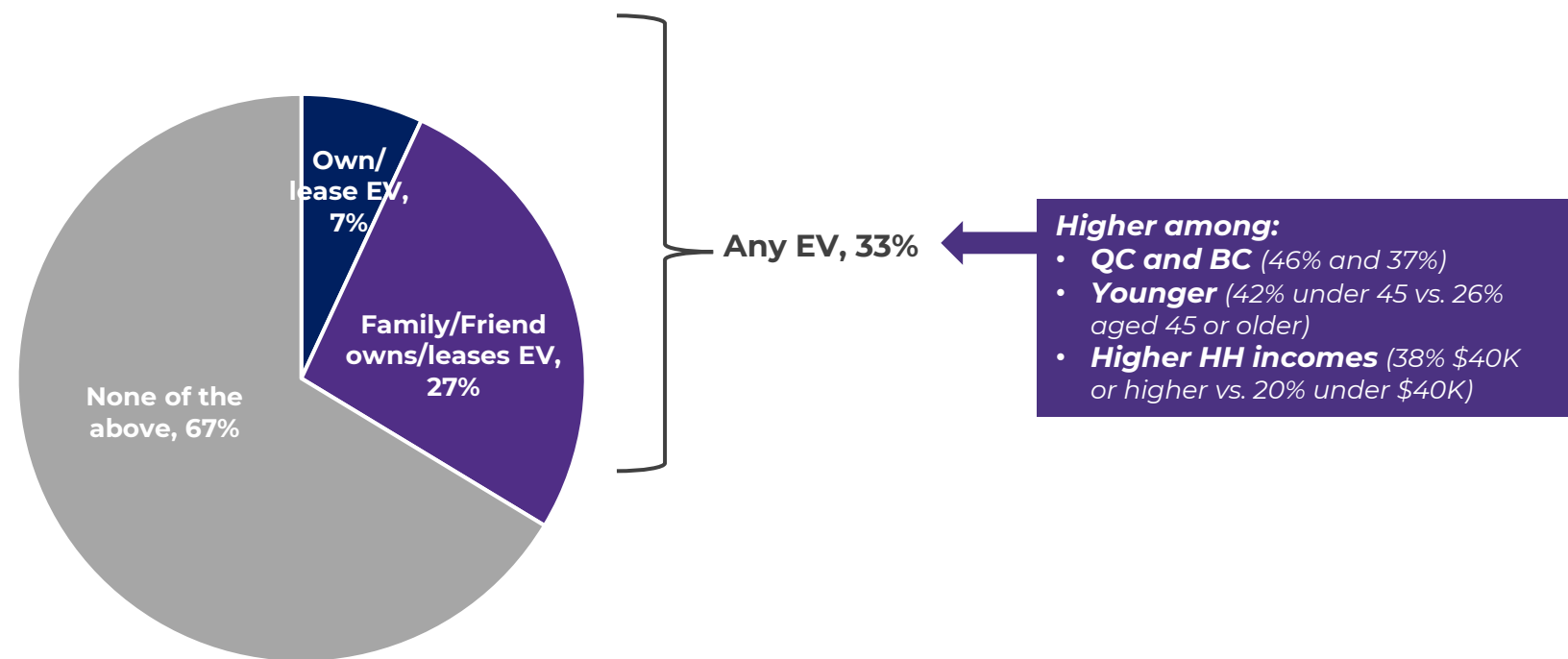
**CURRENT STATE -  
UNDERSTANDING  
PERCEPTIONS**



# Current State | **EV ownership**

One in three Canadians report owning/leasing an EV or knowing someone who does; this skews higher in Quebec and British Columbia.

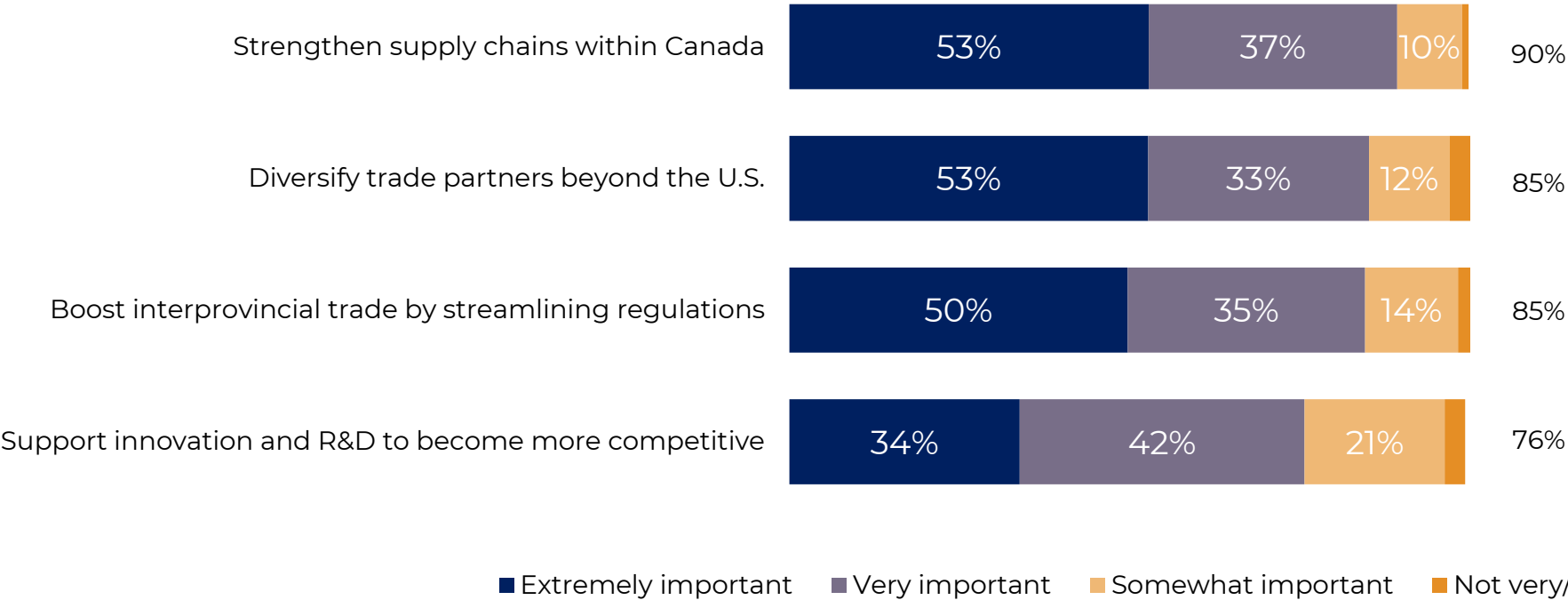
Q20 Which of the following best describes you?



# Perceptions | Importance of initiatives for Canada

The public views supply chains as one part of a multi-prong solution to Canada’s economic challenges, together with trade diversification and stronger interprovincial trade. Innovation and R&D are considered comparatively less important and will need further communication to connect with the public.

Q5     In your opinion, how important will each of the following be for Canada in the coming weeks and months? **Net Important**

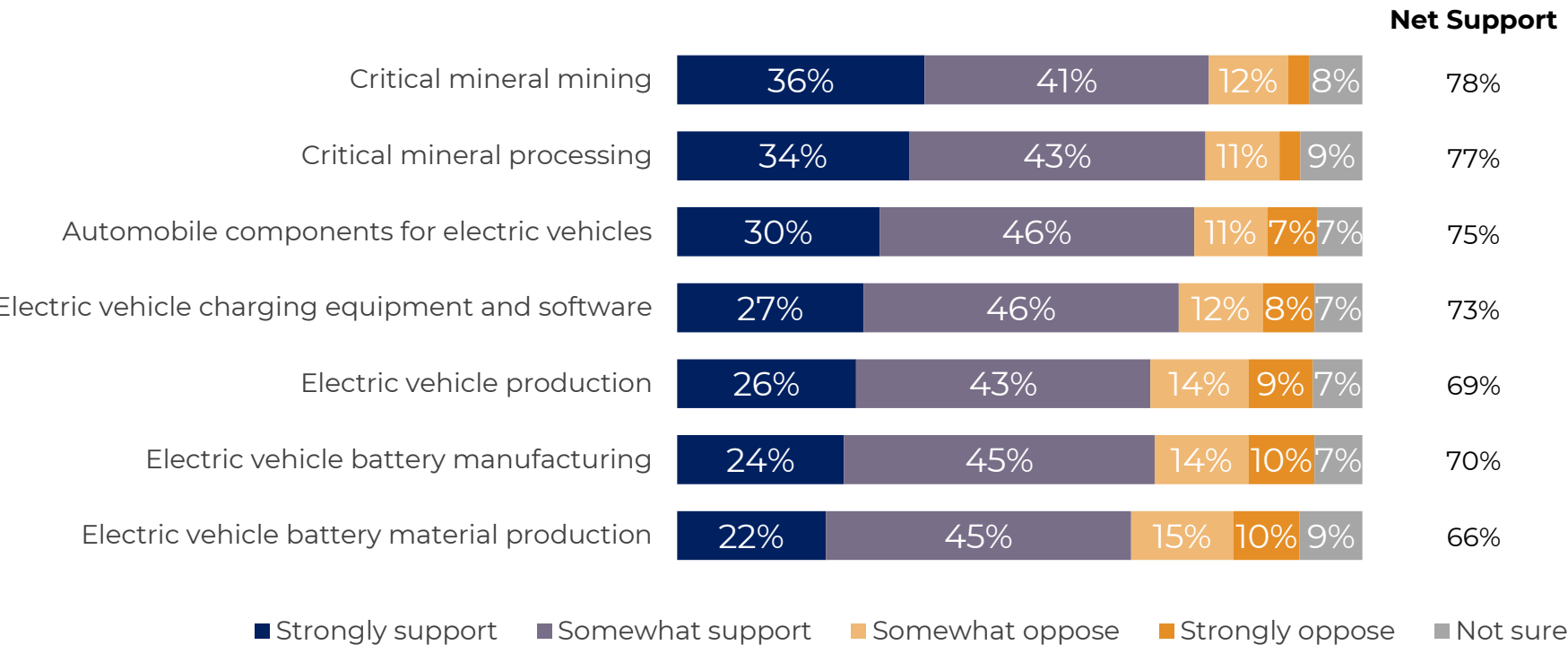


*Strong belief in the importance of the first 3 initiatives is consistently higher among older Canadians (45 and up); for “innovation”, strong importance is higher among those aged 60+.*

# Perceptions | **Industry support**

There is broad public support (two-thirds or more) for all seven EV-related industries. While critical mineral mining and processing top the list, the limited differentiation between industries and modest levels of strong support (one-third or less) indicates public opinion is not firmly established.

Q6 To what extent do you support or oppose each of the following industries as a way to grow the economy and jobs in Canada?



**Strong support for all industries is consistently higher among more educated Canadians and among men. Those who own, or who know people who own EVs, or are aware of ZEV mandates also react more positively to EV-named industries.**

**Among Conservatives, there is higher support for critical mineral industries and lower support for EV-linked industries relative to other party supporters, suggesting polarization of these issues.**

# Perceptions | **Industry support (cont'd)**

Industry support varies by province, with QC stronger on several including automobile components (together with BC), EV charging equipment (with Ontario) and battery manufacturing, and Atlantic Canada stronger on critical mineral extraction and processing, The prairie provinces trail on the EV-specified industries.

Q6      *To what extent do you support or oppose each of the following industries as a way to grow the economy and jobs in Canada?*

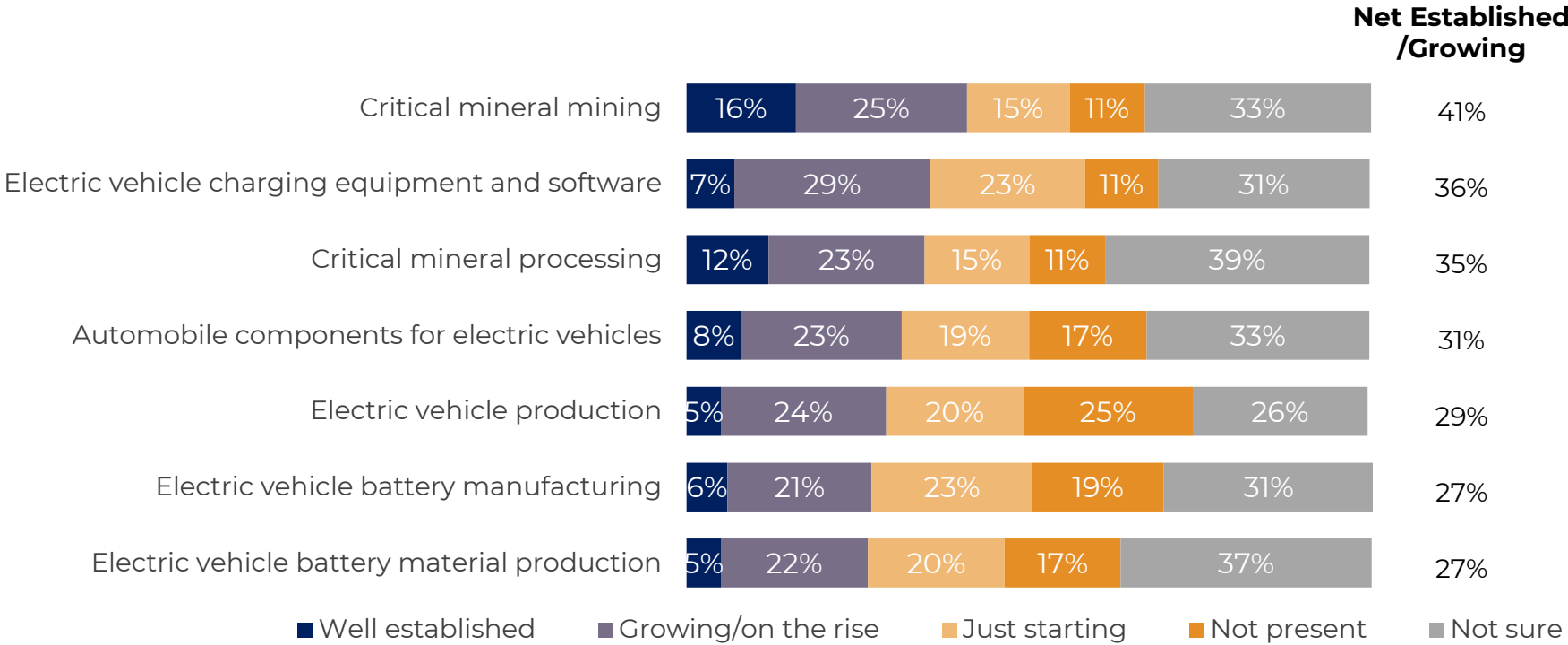
## Support – by province

	BC	AB	SK/MB	ON	QC	ATL
Critical mineral mining	75%	77%	81%	79%	74%	<b>84%</b>
Critical mineral processing	77%	80%	76%	79%	71%	<b>83%</b>
Automobile components for EVs	<b>81%</b>	65%	64%	75%	<b>82%</b>	76%
EV charging equipment and software	77%	60%	60%	<b>76%</b>	<b>76%</b>	71%
EV battery manufacturing	70%	62%	56%	72%	<b>76%</b>	64%
Electric vehicle production	72%	60%	56%	70%	75%	64%
EV battery material production	68%	56%	54%	69%	70%	64%

# Perceptions | **Industry existence in province**

Canadians see the most progress in developing industries around critical mineral mining and processing and EV charging equipment. However, this growth is only visible to a small slice of the public; the majority are uncertain or say these industries are not present or just starting.

Q7 From what you know or have heard, to what extent does each of these same industries exist in your province?



**Perceived growth in most industries is consistently more widespread among:**

- Younger Canadians (under 30)
- EV owners or know someone who owns an EV.

# Perceptions | **Industry existence in province (cont'd)**

Perceived growth of these industries is most visible to residents of Ontario and Quebec; growth in critical mineral mining is also more widely evident to BC and SK/MB residents than to those in AB and the Atlantic provinces.

Q7      *From what you know or have heard, to what extent does each of these same industries exist in your province?*

## Well established or growing – by province

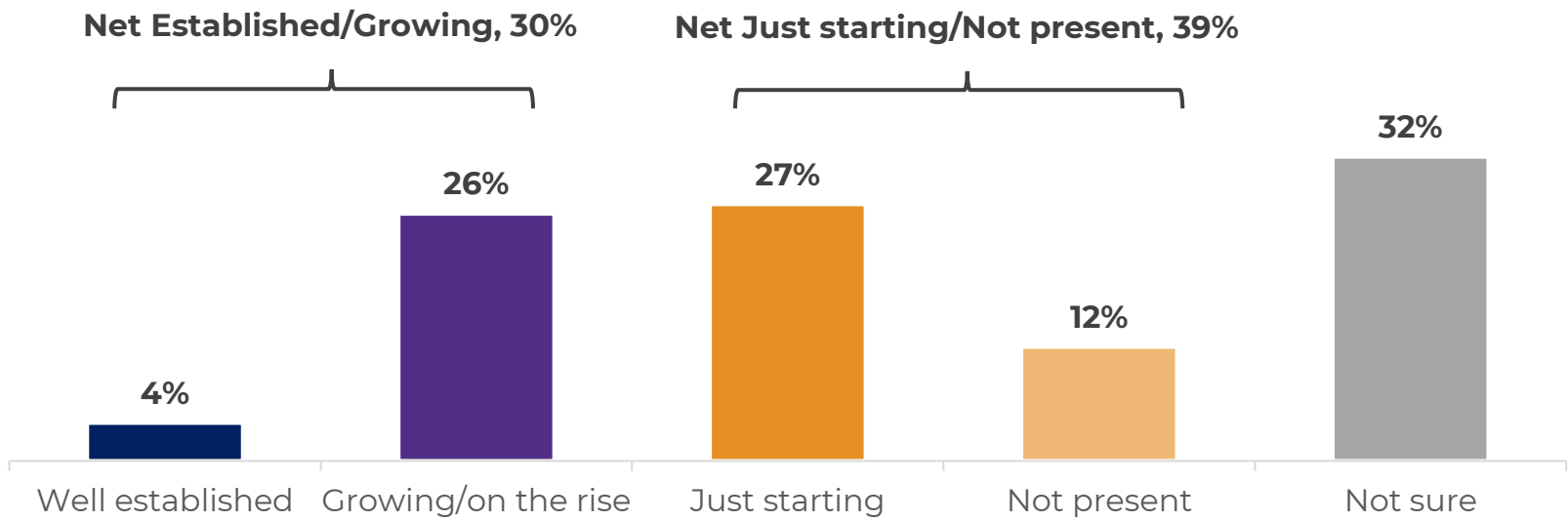
	BC	AB	SK/MB	ON	QC	ATL
Critical mineral mining	43%	33%	41%	46%	41%	26%
EV charging equipment and software	38%	28%	26%	40%	39%	23%
Critical mineral processing	34%	31%	30%	40%	34%	21%
Automobile components for EVs	22%	18%	16%	44%	32%	17%
EV production	21%	18%	14%	40%	32%	15%
EV battery manufacturing	21%	16%	17%	33%	31%	14%
EV battery material production	22%	17%	14%	32%	31%	13%

**FUTURE POTENTIAL**

# Future Potential | **Status of EV supply chain in Canada**

Three in ten Canadians see progress in building an EV supply chain in Canada, while the majority either believe it is nascent (39%) or are uncertain (32%). Optimism about progress is notably higher among younger Canadians.

Q8     *An electric vehicle supply chain is the system of companies, facilities, workers and processes that make, move and assemble all the parts needed to build an electric vehicle, from raw materials to the finished vehicle. From what you know or have heard, is there an electric vehicle supply chain in Canada?*



**Optimism that there is an established or growing EV supply chain in Canada is higher among:**

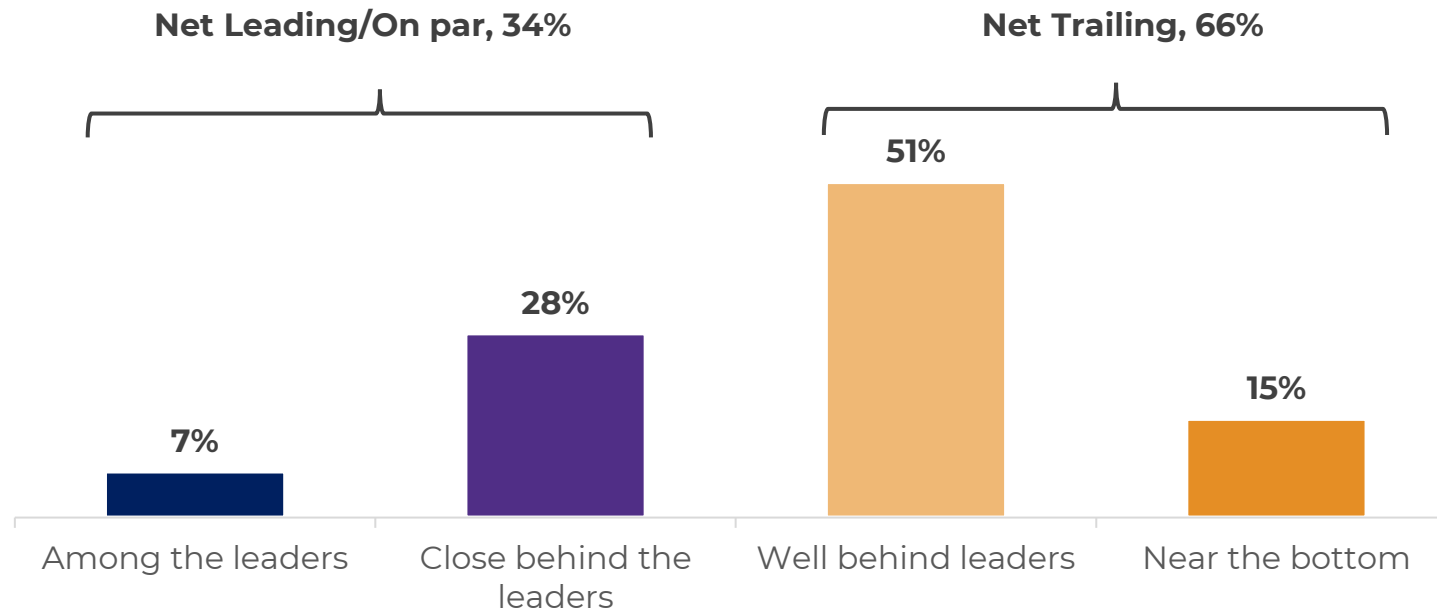
- **Younger Canadians** (52% under 30 vs. 24% 30 and older)
- **Ontario residents** (34%)
- **EV owners or know someone who does** (41% vs. 24% those don't)



# Future Potential | **Canada's position in global EV supply**

The public is twice as likely to believe Canada's EV supply chain efforts are substantially trailing those of other industrialized countries than to say we are leading or on par. Optimism that we are at the forefront is again notably higher among young Canadians (59%).

Q9 Each of these six industries is part of the electric vehicle (EV) supply chain: critical mineral mining and processing, EV battery material production and manufacturing, EV components and EV production. Compared to other industrialized countries like the U.S., Europe, Japan and China, where do you think Canada stands in its EV supply chain? Is Canada...



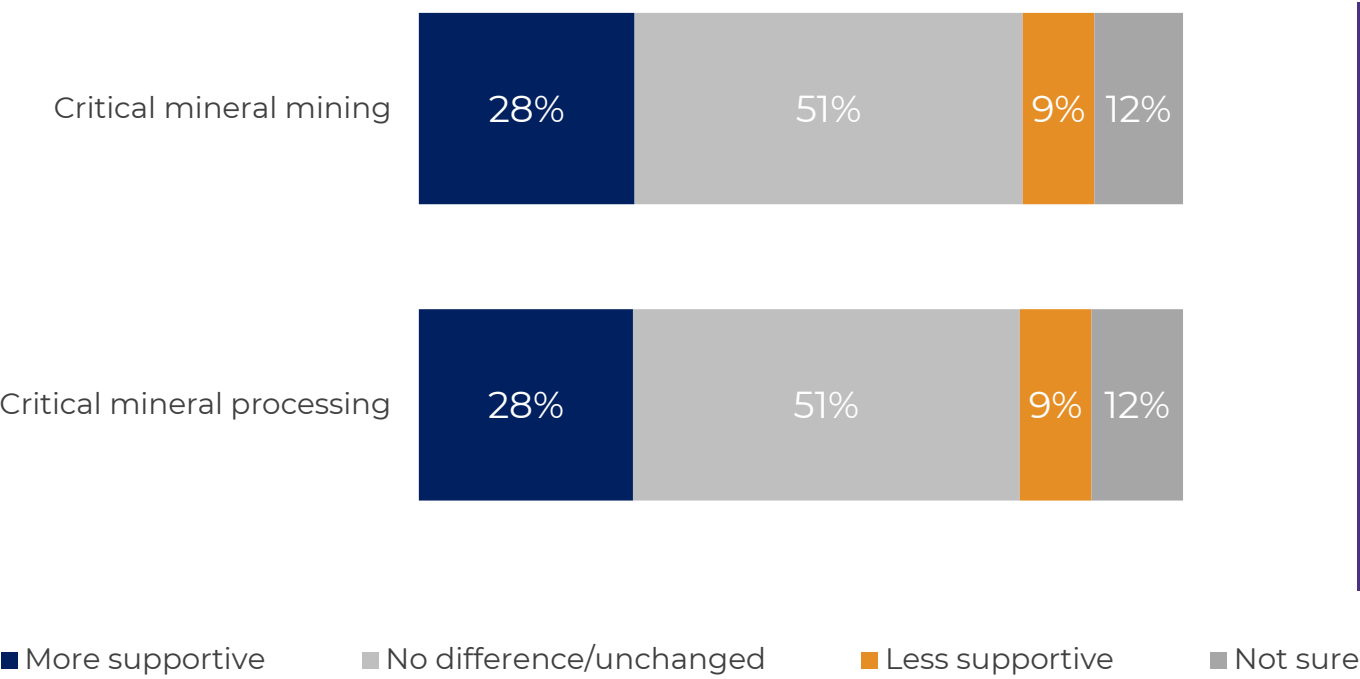
**Optimism that Canada leads or is on par globally in developing an EV supply chain is higher among:**

- **Younger Canadians** (59% under 30 vs 29% aged 30 or older)
- **Those without a postsecondary degree** (40% vs. 32% with)
- **EV owners or know someone who does** (53% vs. 33% who do not)

# Future Potential | **Change in support of critical minerals**

Almost three in ten Canadians become more supportive of critical mineral mining and processing after being told these are part of the EV supply chain; half say it does not change their view.

Q10 Does knowing that the following industries are part of the EV supply chain make you more or less supportive of the industry, or does it make no difference?



**Becoming more supportive in both cases is higher among:**

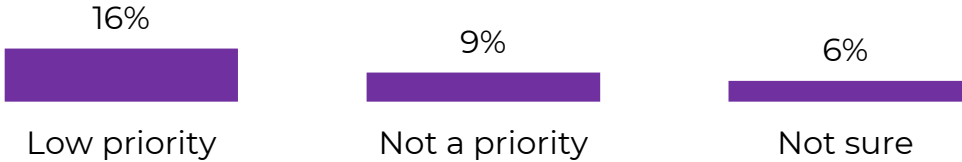
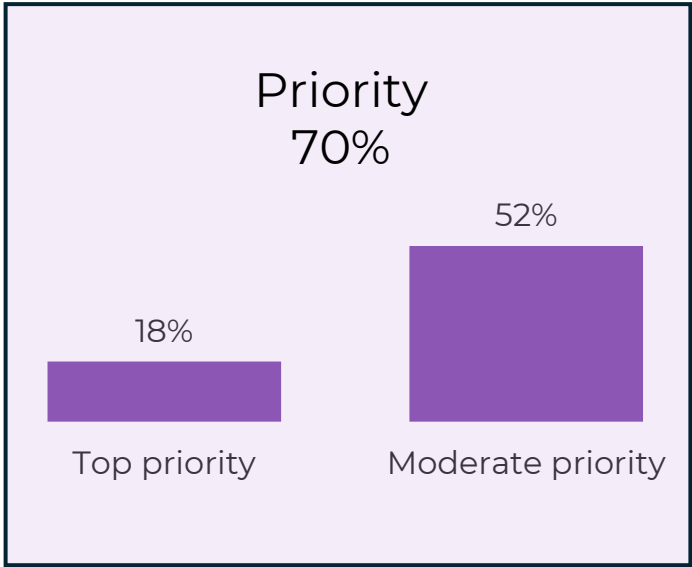
- Men
- EV owners or know someone who does

**There is a small proportion initially opposed to these industries who become more supportive, but others who move in the other direction to become more critical – further evidence of the polarization of EVs.**

# Future Potential | **Priority of investing in EV supply chain**

Seven in ten Canadians say the EV supply chain should be at least a moderate investment priority for Canada, including under two in ten who say it should be a top priority.

Q11 To what extent do you feel the electric vehicle supply chain is something Canada should be investing in?



**Top or moderate priority is higher among:**

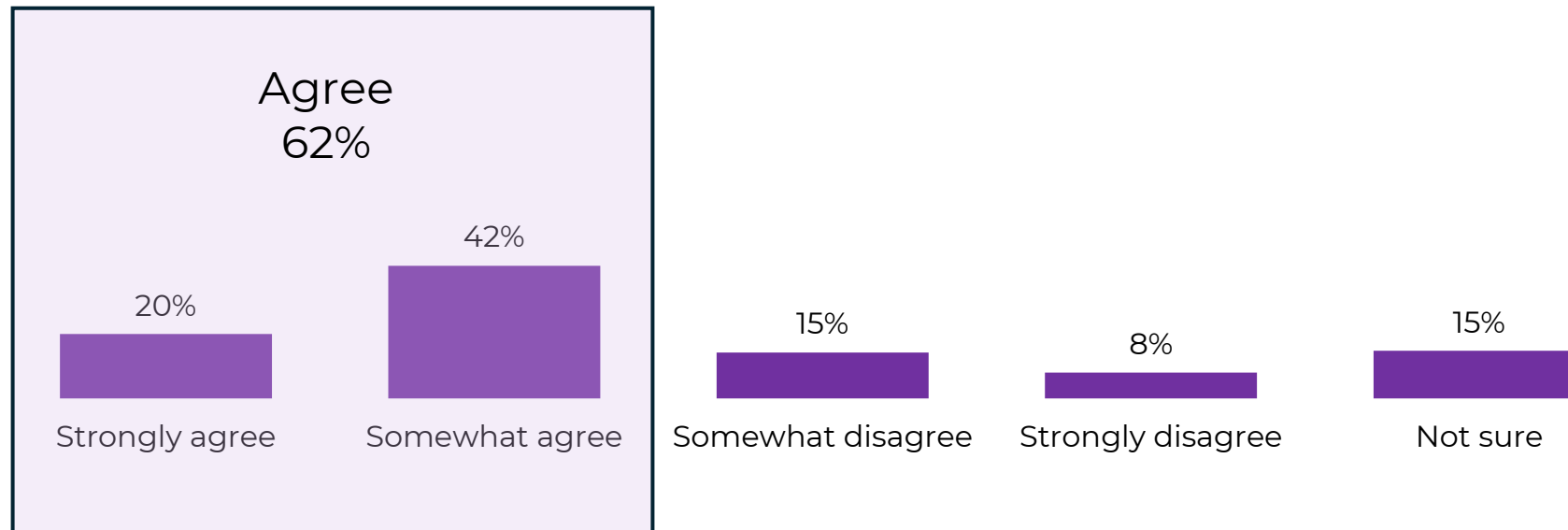
- **BC (73%), ON (73%) and QC (72%) residents** (vs. 60% rest of Canada)
- **Men** (76% vs. 64% women)
- **University-educated** (77% vs. 64% with a college diploma or less education)
- **EV owners or know someone who does** (84% vs. 62% those don't)
- **Those who believe Canada's EV supply chain is growing** (77% vs. 62% saying it is not present)

Top or moderate priority is **lower among Conservative voters** (59%) than other party supporters.

# Future Potential | Reducing barriers to building EV supply chain

There is majority agreement (62%) that governments should reduce barriers to building the EV supply chain in their province, but only one in five strongly agree (similar to the proportion who disagree; 23%) – indicating room for views to shift.

Q14 To what extent do you agree or disagree with the following statement: Governments should reduce barriers to build the EV supply chain in [PROVINCE], like easier approvals for new projects and lower corporate taxes?



**Agreement (strongly or somewhat) is higher among:**

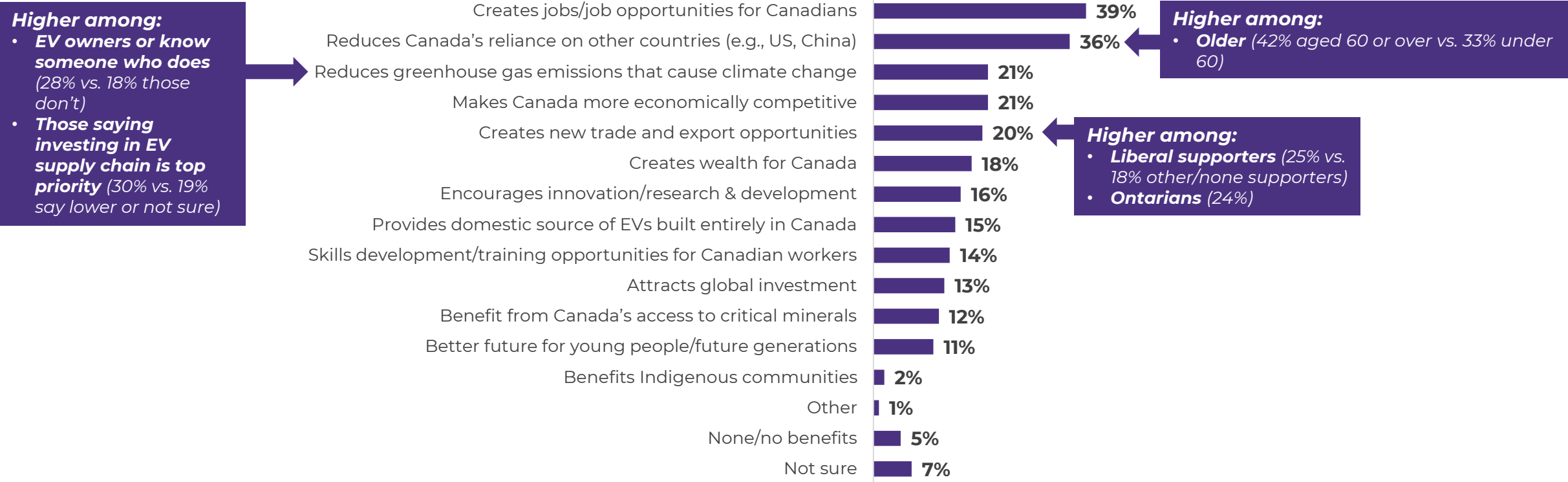
- **Men** (70% vs. 55% women)
- **EV owners or know someone who does** (72% vs. 58% those who don't)
- **Those who think Canada's EV supply chain is growing** (70% vs. 56% saying it is not present)
- **Liberal** (71%) **and Conservative** (65%) **voters** (vs. 52% of others)

**There is no significant difference by region.**

# Future Potential | **Benefits of EV supply chain in Canada**

Job creation and reducing Canada’s reliance on other countries are the benefits of building a domestic EV supply chain that resonate most with Canadians (from a list provided), ahead of broader economic or climate-related advantages.

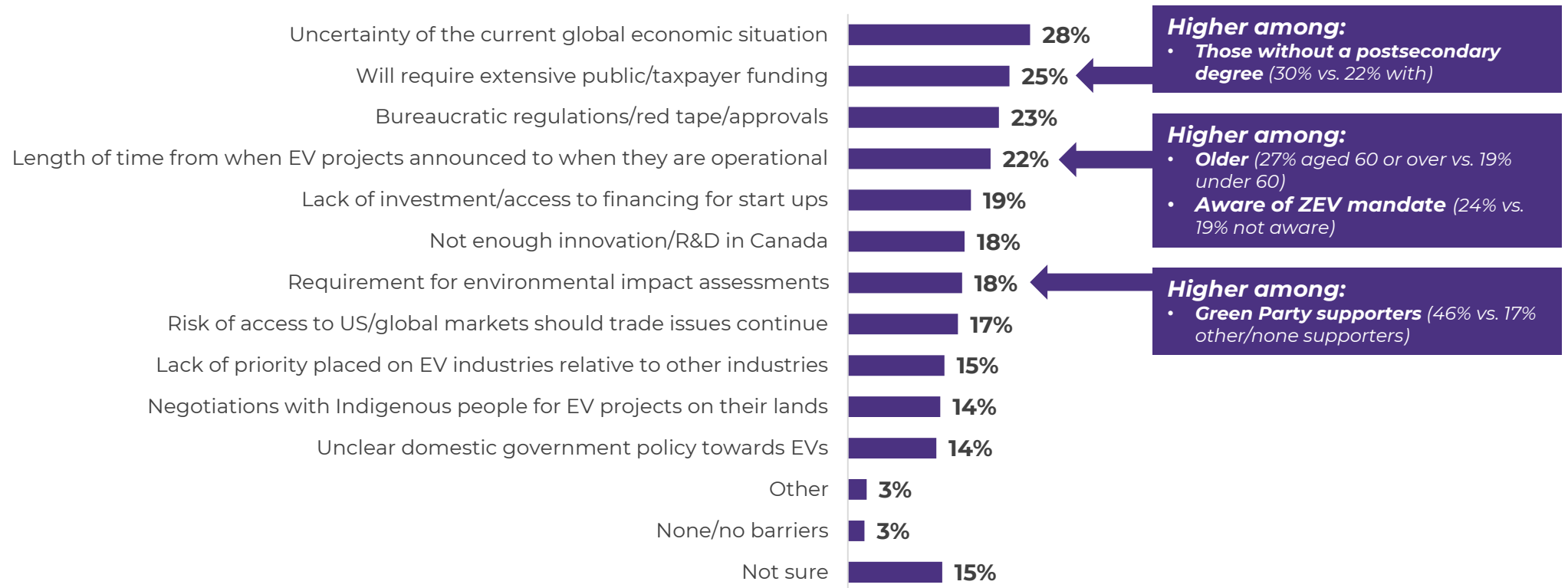
Q12     What are most likely to be the **benefits and advantages**, if any, of building the EV supply chain in Canada?



# Future Potential | **Barriers to building EV supply chain**

Canadians note a range of barriers to building the EV supply chain in Canada, with no one issue dominating. The top perceived barriers (selected from a list) include the uncertainty of the current global economic situation, need for extensive taxpayer funding, regulatory red tape and how much time it takes for EV projects to become operational.

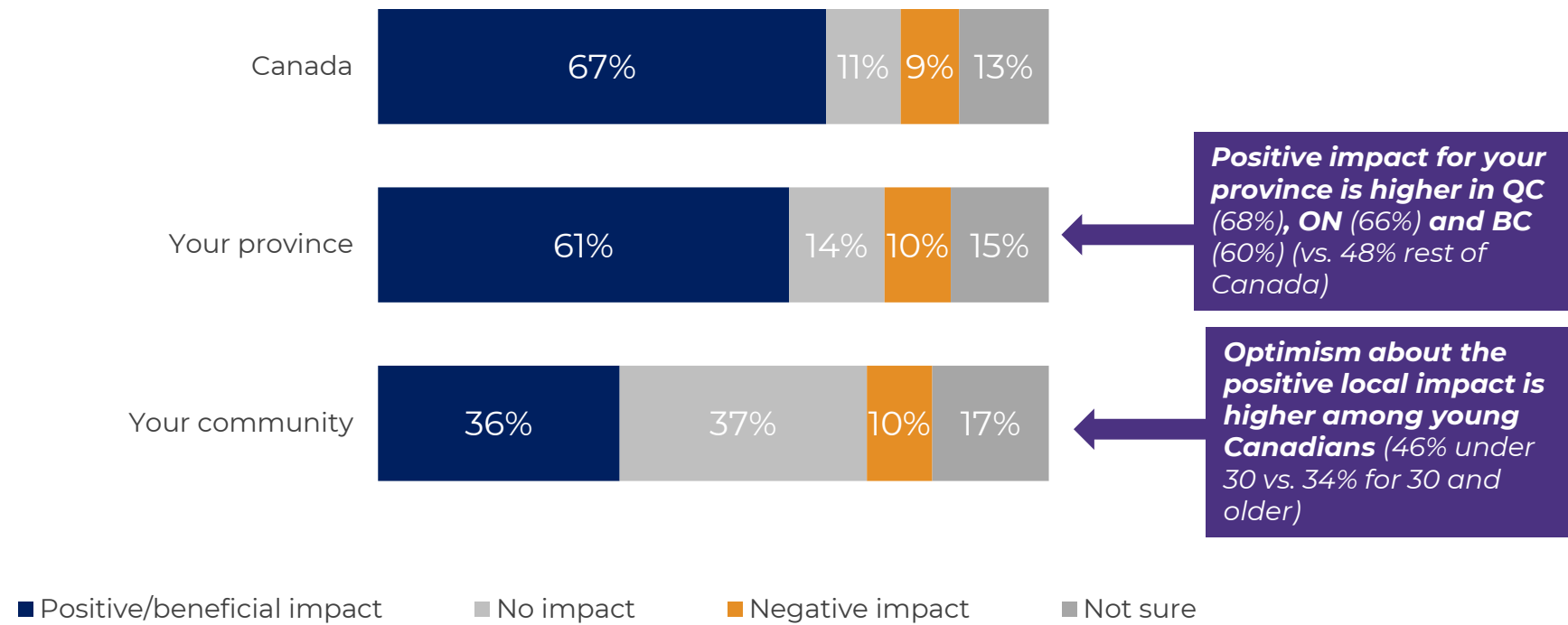
Q13 What are the **barriers**, if any, making it difficult to build the EV supply chain in Canada?



# Future Potential | **Impact of a strong EV supply chain**

Canadians are more optimistic about the impact of a strong domestic EV supply chain on the whole country or on their province than on their own community, suggesting the importance of creating/highlighting local benefits. Positive provincial benefits are considered more likely to accrue in provinces where the auto sector currently exists.

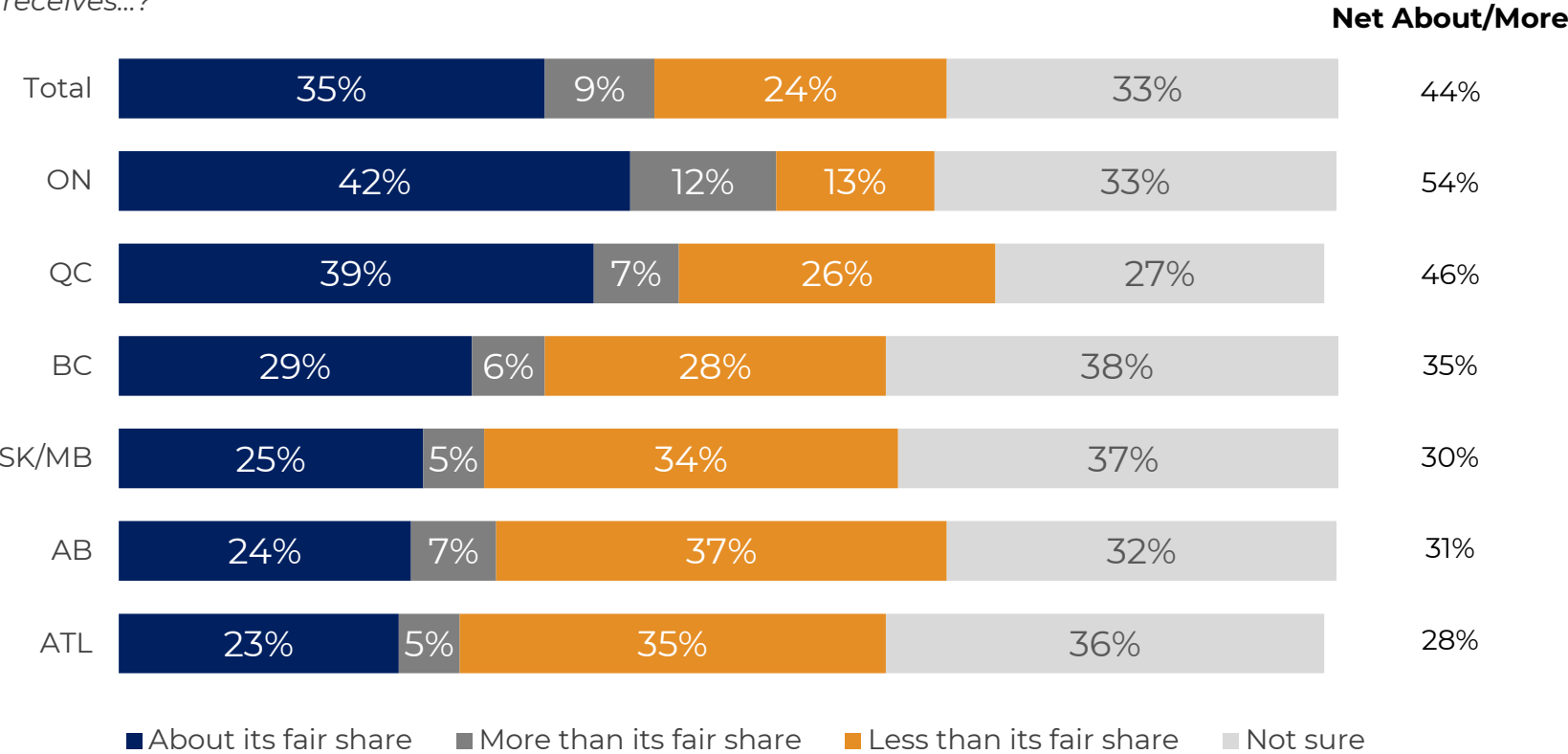
Q15 Do you think a strong EV supply chain in Canada will have a positive (or beneficial) impact, a negative impact or no impact on each of the following?



# Future Potential | Provincial share of EV funding

Belief that their province receives its fair share (or more) of investment into EV and battery manufacturing is most widespread in Ontario and Quebec. Other provinces are divided between belief they receive less than their fare share and being uncertain.

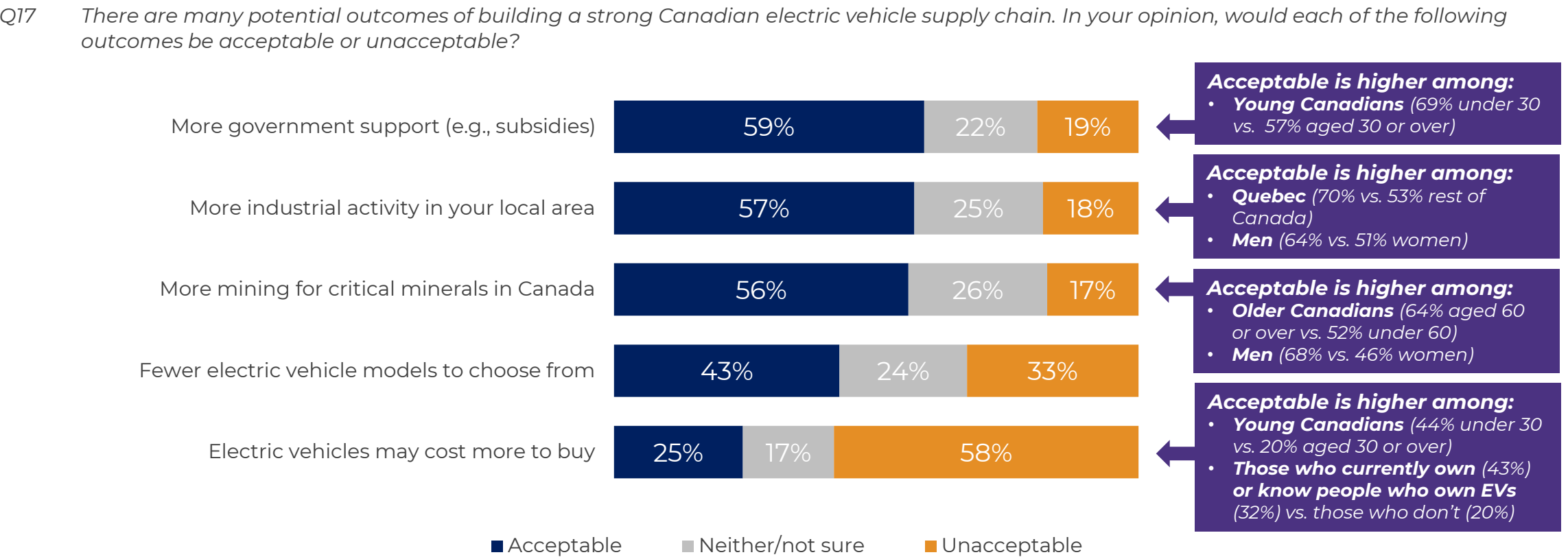
Q16 Thinking about the money invested by the federal and provincial governments to encourage EV and battery manufacturing in Canada, do you think your province receives...?





# Future Potential | **If potential EV outcomes are acceptable**

Trade-offs that don't directly affect consumers, such as the use of government subsidies, more industrial activity and more critical mineral mining, are acceptable to Canadians. A majority say it is unacceptable that a domestic EV supply chain would lead to more expensive EVs in Canada.

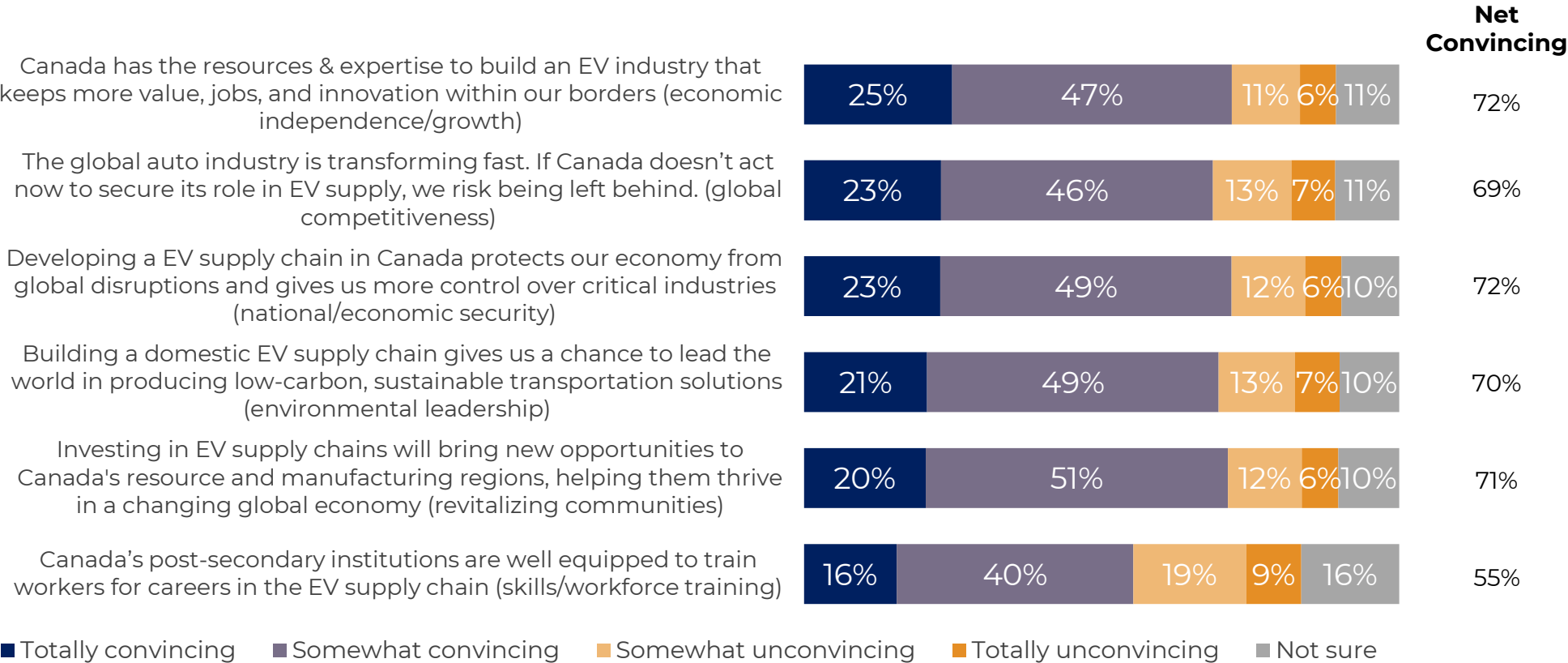


# MESSAGING

# Messaging | **Convincing EV supply chain statements**

Canadians are open to various messages about building the EV supply chain in Canada, but are less convinced by the argument that post-secondary institutions are well-equipped to train workers for EV supply chain careers.

Q18 To what extent do you think the following statements would convince people you know to support building the EV supply chain in Canada ?

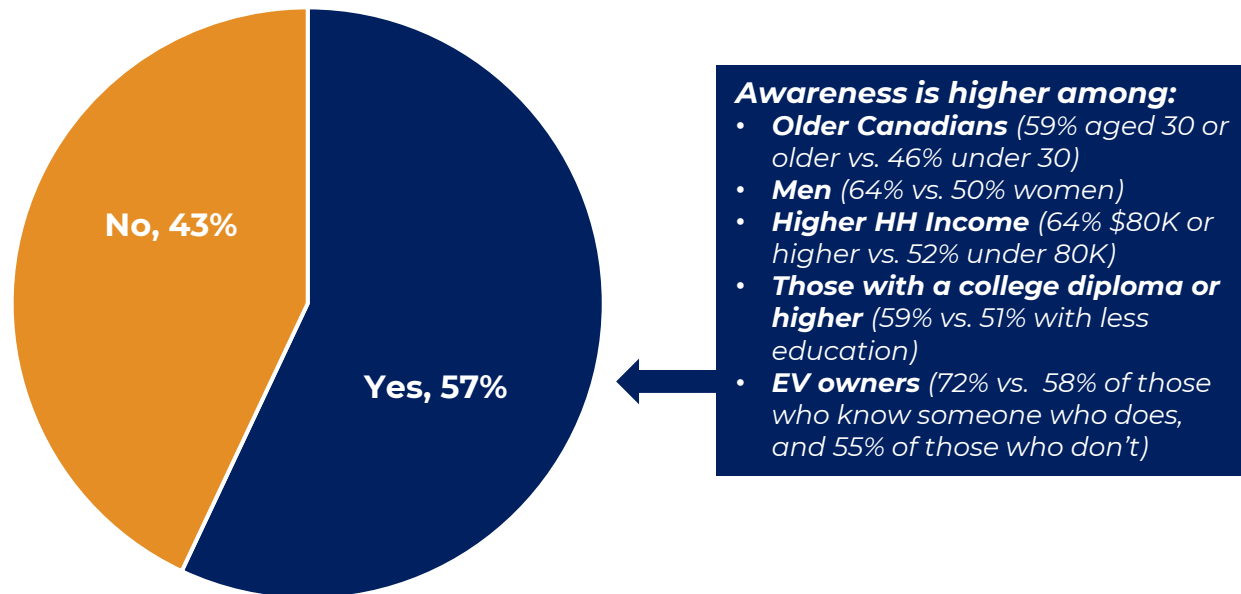


*There is limited variation in how regional and demographic subgroups respond to these arguments.*

# Messaging | **Awareness of federal ZEV policy**

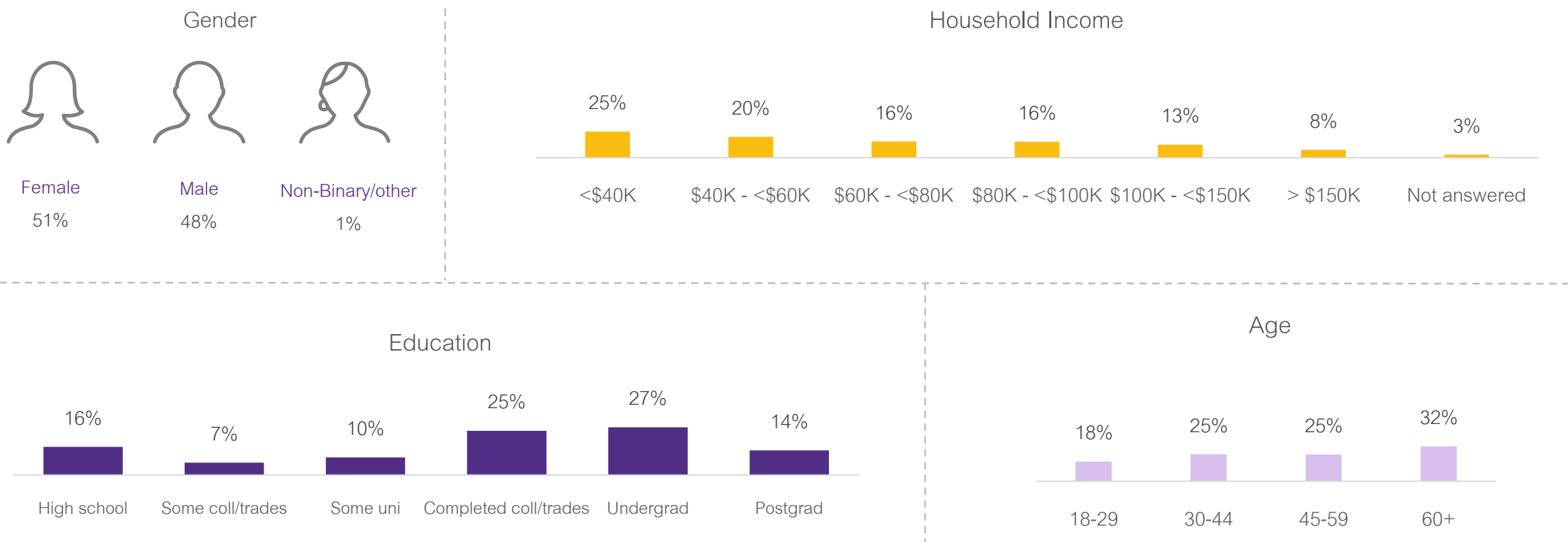
A slim majority Canadians are aware of the ZEV mandate; this awareness is correlated with more positive views about a domestic EV supply chain.

Q19     *The federal government has established a requirement that, by 2035, all new cars and light trucks sold in Canada must be electric or zero-emission vehicles (ZEV). The government of Quebec and British Columbia have their own ZEV mandates that complement the national target. Before today, were you aware of this policy?*

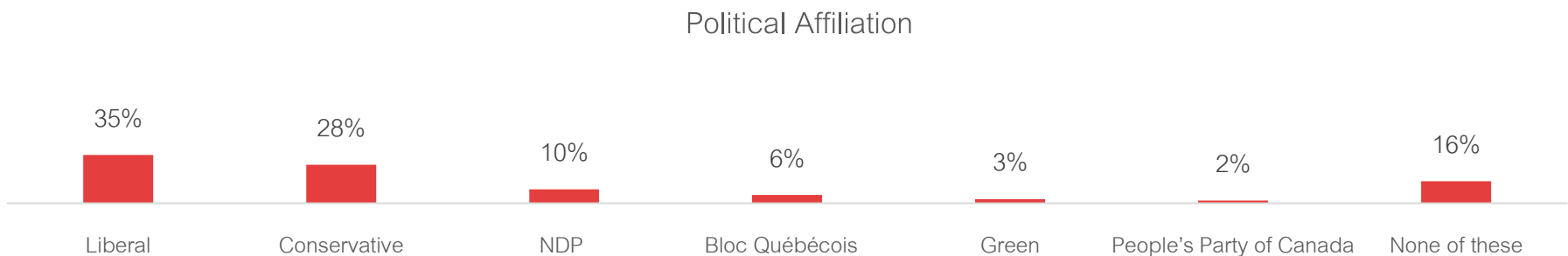
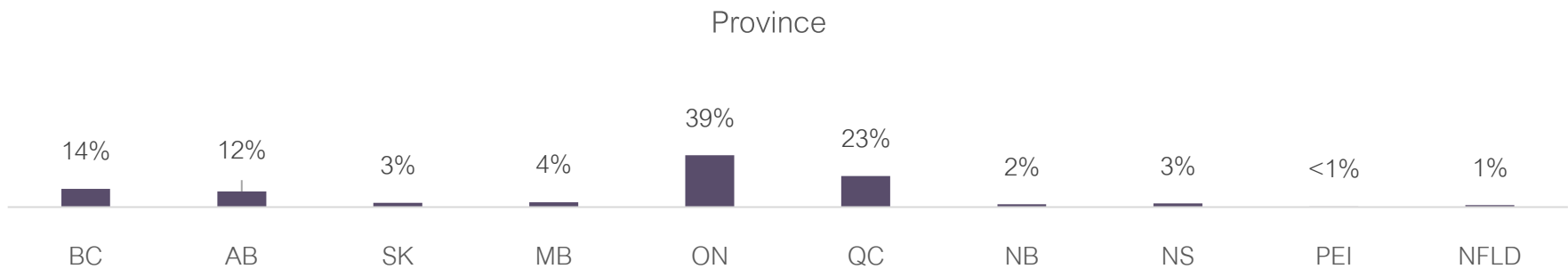


# DEMOGRAPHICS

# Demographics | Respondent profile



# Demographics | Respondent profile cont.



# Thank you.

**ENVIRONICS**  
RESEARCH

