

Medium and Heavy-Duty Vehicles (MHDV) Fleet Awareness, Knowledge and Attitudes Related to Zero-Emission Vehicles (ZEVs) Survey

Report

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For more information on this report, please contact the NRCan at nrcan.por-rop.nrcan@canada.ca

Natural Resources Canada (NRCan) commissioned Abacus Data to conduct a public opinion research survey of the Canadian freight transportation industry. The aim of this research was to understand perspectives on zero-emission medium and heavy-duty vehicles in the trucking industry as well as establish a baseline for future measures. A total of 337 representatives of the Canadian freight transportation industry who were involved in or knowledgeable about the vehicle management, use and purchasing of vehicles for their fleet of vehicles were surveyed by telephone in October and November of 2022. This publication reports on the findings of this research.

Cette publication est aussi disponible en français sous le titre: Sondage : connaissances et attitudes des exploitants de parcs de véhicules moyens et lourds (VML) à l'égard des véhicules à émission zéro (VEZ).

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Executive Summary

1.1. Research Purpose

Zero-Emission Vehicles (ZEVs), including medium- and heavy-duty vehicles (MHDV), are key to reducing transportation emissions in Canada. The purpose of the research is to provide a baseline understanding of how fleet owners and managers view ZEVs. It is important to have a reliable baseline within the context of such a dynamic industry in order to provide information now, and over time, that can be used to inform government policy and program design. The survey measures awareness, knowledge and confidence in ZEVs.

1.2. Research Objectives

The overall objectives of the research are to:

- Provide insight into Canadian MHDV fleet awareness, understanding, attitudes and confidence regarding ZEVs.
- Provide a baseline for key performance indicators and key market data to measure and track impacts and progress resulting from government and partner investments to foster ZEV adoption in the freight sector.

In addition, the findings will be used to advance policy and program investments to achieve the government's ZEV objectives.

1.3. Methodology

A total of 337 telephone surveys were completed with commercial, institutional and government fleet owners and operators between October 14 and November 16, 2022. The margin of error for a sample of this size is +/- 5.3. Data is weighted by NAICS code.

To qualify, respondents need to be at least knowledgeable about their company's fleet in regard to vehicle management, use and purchasing of vehicles.

1.4. Sub-group analyses, statistical significance and rounding

In addition to descriptive analysis, analysis was undertaken to establish any differences in views based on business characteristics such as location (region), type of fleet (private, for-hire and both), and number of trucks. Only differences significant at the 95% confidence level are discussed in this report. The margin of error for sub-groups varies by population size. For example, a sub-group of 90 respondents would have a margin of error of +/-10.3 while one of only 50 respondents would be +/- 13.9.

Please note that due to rounding, in some cases it may appear that merged categories collapsed together are different by a percentage point from when they are presented individually, and totals may not add up to 100%.

1.5. Contract value

The total contract value for the project was **\$81,699.00** including applicable taxes.

1.6. Statement of Political Neutrality

I hereby certify as a representative of Abacus Data that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Communications Policy of the Government of Canada and Procedures for Planning and Contracting Public Opinion Research. Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of apolitical party or its leaders.

Richard Jenkins, Ph.D., CAIP