



Shell Canada and Ipsos Survey Results

Overview

Shell recently opened its second Canadian hydrogen fuel station in Burnaby, British Columbia. To support the opening, Shell and Ipsos conducted a study among the general population of Canada to better understand Canadians' consideration and attitudes towards low emission vehicles, including hydrogen fuel vehicles, their barriers to consideration, as well as their perspectives on how these types of vehicles impact the environment.

Overarching Canadian Narrative

Many Canadians are planning to purchase or lease a vehicle within the next couple years (40%). Among the wide range of options, almost half of Canadians are considering a low emission vehicle for their next purchase or lease (47%). This is not surprising, given that over 4 in 5 Canadians say if more people drove low emission vehicles, it would make a big impact on the environment (84%).

Although Canadians are interested in low emission vehicles, many are not aware that hydrogen fuel vehicles are an option (68%). The majority of Canadians say they would consider a hydrogen fuel vehicle if they knew more about them (69%), and currently, 2 in 5 feel held back from purchasing or leasing a hydrogen fuel vehicle by a lack of knowledge about hydrogen fuel (41%).

Lack of infrastructure is a key barrier to purchase for hydrogen fuel vehicles. Close to half of Canadians say they're held back because they feel there's a lack of infrastructure, including hydrogen fuel stations (44%). That said, there is a desire for development. Almost 9 in 10 Canadians say there should be better infrastructure to support hydrogen fuel vehicles on the roads (85%).

There is an opportunity to educate both Millennials and women about hydrogen fuel vehicles in Canada. Millennials are the least likely age group to be aware of hydrogen fuel vehicles (42% Gen Xers and 46% Boomers vs. 30% Millennials), and women report lower awareness than men (25% vs. 55%).

Canadians also recognize the positive environmental impact this can have. Over 4 in 5 say that making the switch to a hydrogen fuel vehicle is good for the environment (83%).



Overarching British Columbia Narrative

1 in 3 British Columbians are planning to purchase or lease a vehicle within the next two years (34%). British Columbians are more likely than other Canadians to consider a low emission vehicle for their next purchase or lease (66% in BC vs. 34% - 46% across other provinces), and their consideration is higher for low emission vehicles than other types (66% for low emission vs. 52% gasoline engine and 6% diesel engine). This is not surprising, given that 9 in 10 British Columbians say if more people drove low emission vehicles, it would make a big impact on the environment (89%).

Although British Columbians are more interested in low emission vehicles than other types, many are not aware that hydrogen fuel vehicles are a low emission option (60%). The majority of British Columbians say they would consider a hydrogen fuel vehicle if they knew more about them (65%), and currently, half feel held back from purchasing or leasing a hydrogen fuel vehicle by a lack of knowledge about hydrogen fuel (47%).

Lack of infrastructure is a key barrier to purchase for hydrogen fuel vehicles. Close to half of British Columbians say they're held back because they feel there's a lack of infrastructure, including hydrogen fuel stations (45%). That said, there is a desire for development. Almost 9 in 10 British Columbians say there should be better infrastructure to support hydrogen fuel vehicles on the roads (86%).

Key Canadian Headlines:

- Almost half of Canadians are considering a low emission vehicle for their next purchase or lease (47%)
- Over 4 in 5 Canadians say that if more people drove low emission vehicles, it would have a big impact on the environment (84%)
- 2 in 3 Canadians are not aware that hydrogen fuel vehicles are an option when choosing a low emission vehicle (68%)
- 7 in 10 Canadians would consider purchasing or leasing a hydrogen fuel vehicle if they knew more about them (69%)
- 2 in 5 Canadians are held back from purchasing or leasing a hydrogen fuel vehicle by a lack of knowledge about hydrogen fuel (41%)



- Close to half of Canadians are held back from purchasing or leasing a hydrogen fuel vehicle because they feel there's a lack of infrastructure to support it, such as gas stations that sell hydrogen fuel (44%)
- Almost 9 in 10 Canadians say there should be better infrastructure to support hydrogen fuel vehicles on the roads (85%)
- Over 4 in 5 Canadians say making the switch to a hydrogen fuel vehicle is good for the environment (83%)
- Gen Xers and Boomers are more likely than Millennials to be aware of hydrogen fuel vehicles (42% Gen Xers and 46% Boomers vs. 30% Millennials)
- Men are more likely than women to be aware to be aware of hydrogen fuel vehicles (55% vs. 25%)

Key British Columbia Headlines

- British Columbians are more likely than Canadians in any other province to consider a low emission vehicle for their next purchase or lease (66% in BC vs. 34% - 46% across other provinces).
- British Columbians' consideration is higher for low emission vehicles than other vehicle types (66% for low emission vs. 52% gasoline engine and 6% diesel engine).
- 3 in 5 British Columbians are not aware that hydrogen fuel vehicles are an option when choosing a low emission vehicle (60%)
- Half of British Columbians are held back from purchasing or leasing a hydrogen fuel vehicle by a lack of knowledge about hydrogen fuel (47%)
- Close to half of British Columbians are held back from purchasing or leasing a hydrogen fuel vehicle because they feel there's a lack of infrastructure to support it, such as gas stations that sell hydrogen fuel (45%)
- Almost 9 in 10 British Columbians say there should be better infrastructure to support hydrogen fuel vehicles on the roads (86%)
- Almost 9 in 10 British Columbians say making the switch to a hydrogen fuel vehicle is good for the environment (86%)



- Almost 2 in 3 British Columbians would consider purchasing or leasing a hydrogen fuel vehicle if they knew more about them (65%)
- 9 in 10 British Columbians say that if more people drove low emission vehicles, it would have a big impact on the environment (89%)

Methodology

The online survey was conducted through the Ipsos panel. The study was in field between October 30 –November 4, 2019, and surveyed n=1,000 Canadians starting from the ages of 18 and older. Demographics were balanced to ensure the sample's composition reflects that of the adult population according to Census data. The survey was offered Canada-wide in English & French. For the purposes of margin of error, a comparable study utilizing a probability-based sample would yield an overall margin of error of +/- 3% at a 95% confidence level.