

ELECTRIC CIRCUIT SURVEY

2016

HIGHLIGHTS

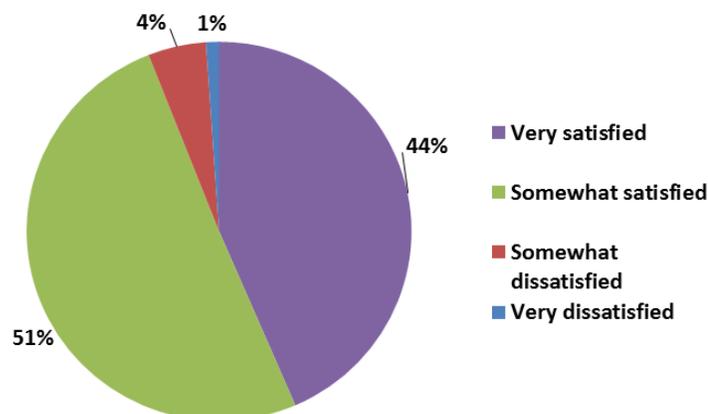
- The vast majority of respondents appreciate the charging experience and find the Electric Circuit Web site and mobile app easy to use.
- Over two thirds of respondents want two or more fast-charge stations at existing sites and more service points along main roads and in urban centres.
- Satisfaction regarding charging rates is high (79%). However, the comments concerning the 240-volt charging stations are split. Two thirds asked to eliminate the \$2.50 rate, while one third said that the rate of \$1/hour is too expensive. A per kWh rate was also requested, but actually that possibility is not permitted by the regulatory framework.

The 2016 survey was designed to help us better understand our members' charging habits, which is why several of the questions cover charging/consumption habits at public charging stations and at home and work. A number of questions, mainly those concerning personal, monetary or operational information, have not been included in this report for confidential reasons.

Conducted from November 1 to 10, 2016, and answered by 1674 of the Electric Circuit's 10,762 users.

OVERALL SATISFACTION

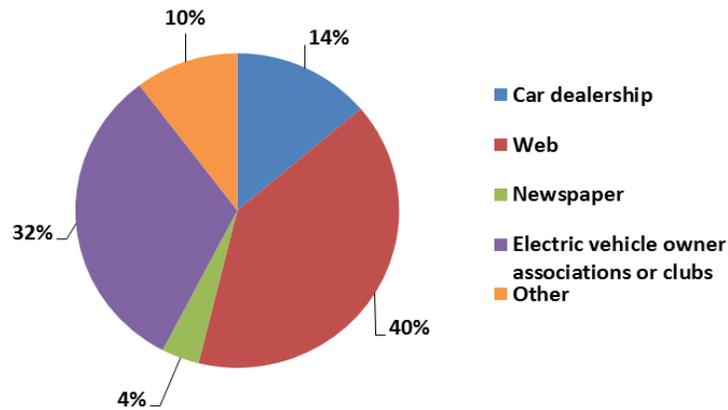
Satisfaction with the Electric Circuit rose from 93% in 2015 to 95% in 2016.



QUESTIONS

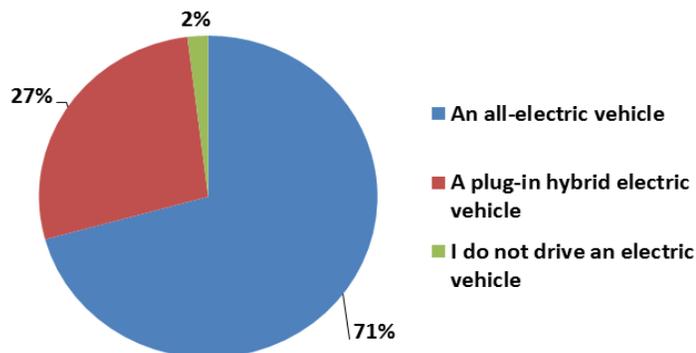
How did you hear about the Electric Circuit?

Almost half of the respondents (40%) said they found out about the Electric Circuit on the Web and 32% through electric vehicle (EV) owner associations and clubs.



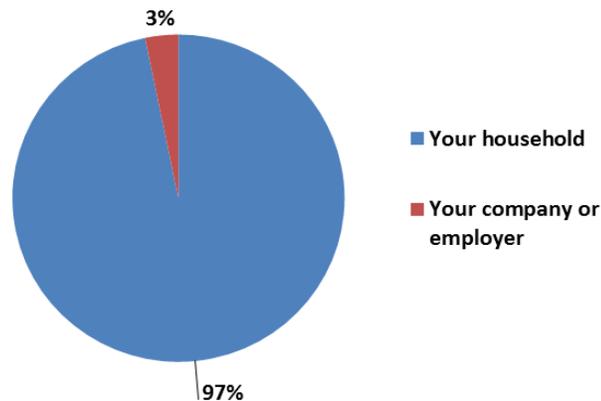
Do you have access to an all-electric vehicle, a plug-in hybrid electric vehicle or do you not drive an electric vehicle?

Although the majority of electric vehicles in Québec are plug-in hybrid vehicles (55% according to statistics from the Société de l'assurance automobile du Québec as at October 31, 2016), only 27% of respondents said they own a plug-in hybrid vehicle.

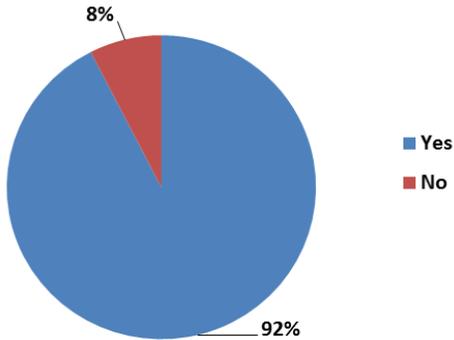


Does the vehicle belong to you, is it your household's main vehicle and are you its main user?

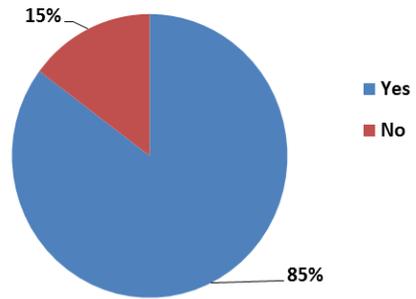
In 97% of cases, respondents owned their vehicle and were its main user (92%). In addition, 85% of respondents said the EV was their household's main vehicle.



Are you the main user?

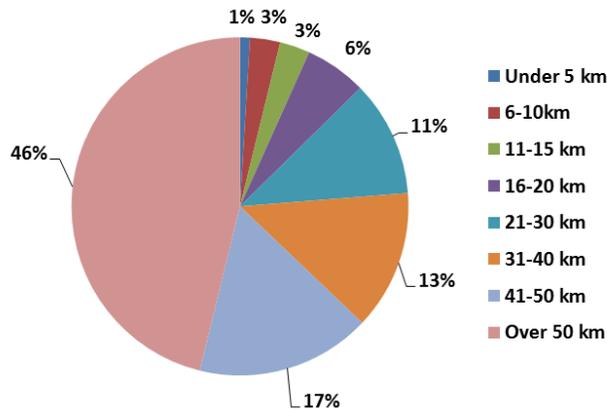


Is it your main vehicle of your household?



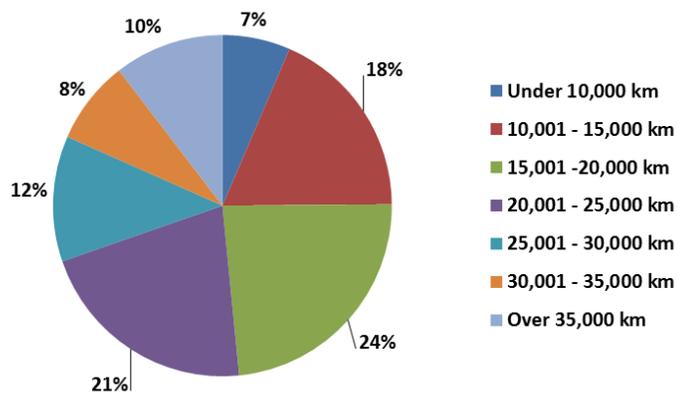
How many kilometres do you drive per day with your EV?

The majority of respondents (76%) said they drive over 31 km per day, from which 46% of respondents drive over 50 km per day.



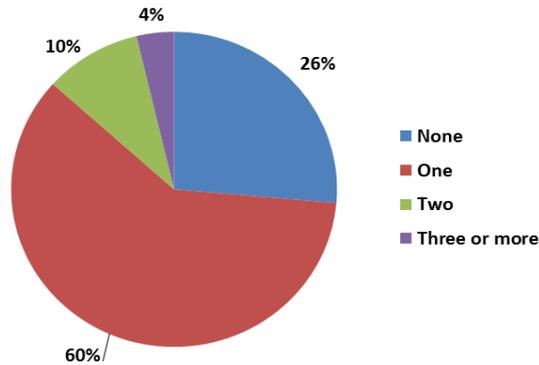
What is the annual mileage of your EV?

The annual mileage varied.



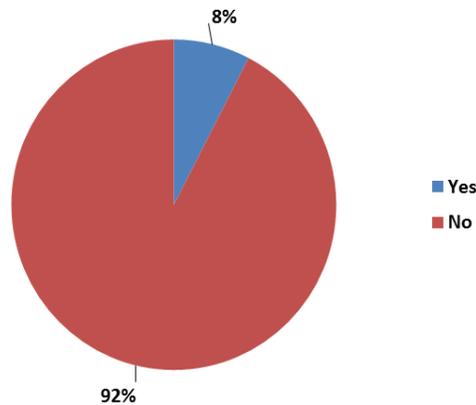
How many gas-powered vehicles does your household own in addition to your EV?

Over half of respondents (60%) said they have one gas-powered vehicle in addition to their EV.



Has the mileage of your gas-powered vehicle(s) increased since you got an EV?

The vast majority (92%) of respondents who own a second gas-powered vehicle said the mileage in that vehicle had not increased since they purchased their EV, as their EV fulfills most of their travel needs.



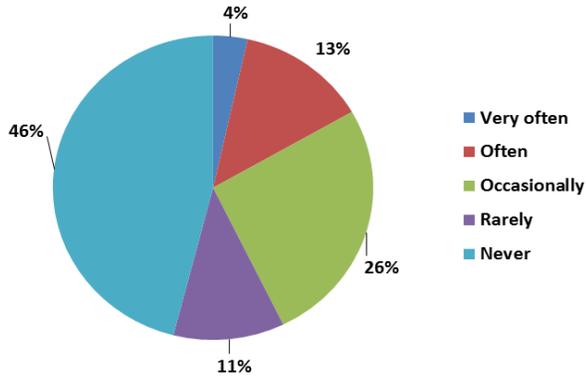
The 8% of respondents who reported an increase in the mileage of their gas-powered vehicle compared with the previous year attributed that increase to the fact that they often have to drive long distances that are outside the range of their EV.

ELECTRIC CIRCUIT CHARGING STATIONS

What type of Electric Circuit charging stations do you use?

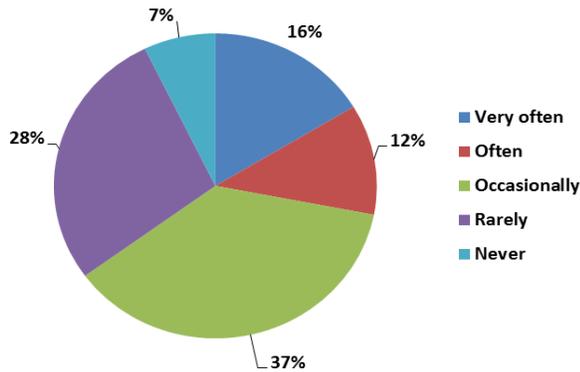
a) Fast-charge stations (400 volts)?

Only 17% of respondents said they use fast-charge stations often or very often, and 46% said they have never used fast-charge stations.



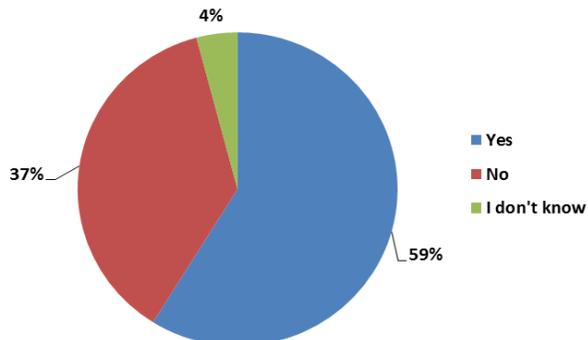
b) Standard charging stations (240 volts)?

Standard charging stations are more commonly used than fast-charge stations, with 28% of respondents reporting they use them often or very often and only 7% saying they have never used them.



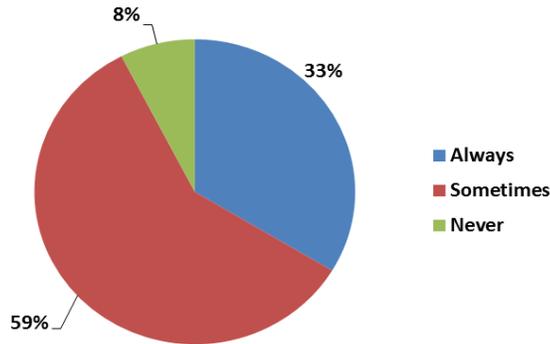
The Electric Circuit has about 60 fast-charge stations. Can your vehicle handle a 400-V charge?

Over half of respondents (59%) can use fast-charge stations, an improvement compared with 2015 (55%). However, 37% of respondents (38% last year) cannot use fast-charge stations.

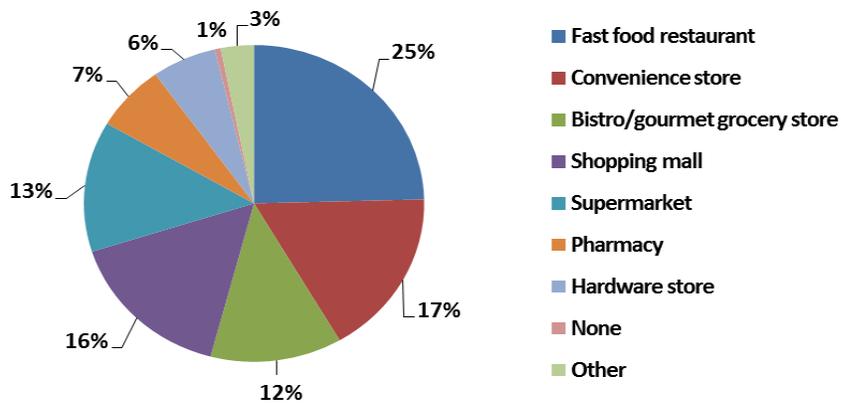


While charging your vehicle at a 400-V fast-charge station, do you spend money at businesses near the station?

Of the 59% of respondents who can use fast-charge stations, the majority (92%) said they spend at nearby businesses while their car is being charged (compared with 88% in 2015) and 33% said they always do so (32% in 2015).

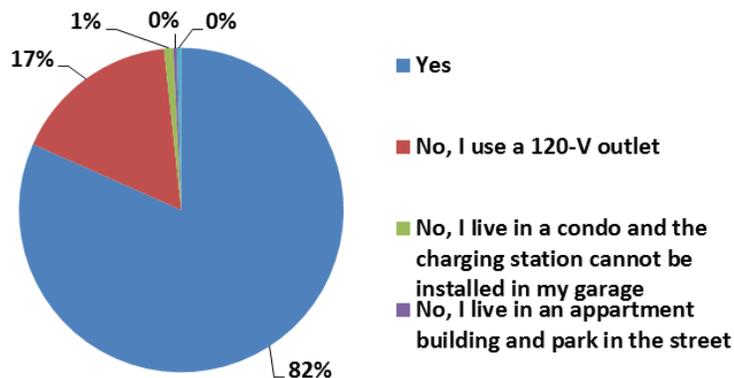


Of the 92% of respondents who make purchases at businesses near the fast-charge station, they mostly prefer to spend money at fast food restaurants (25%) and convenience stores (17%).



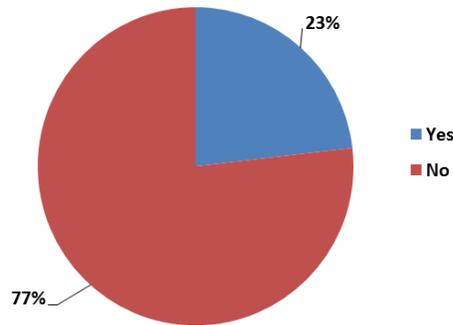
Do you have a 240-V charging station at home?

The vast majority of respondents have a charging station at home (82%).

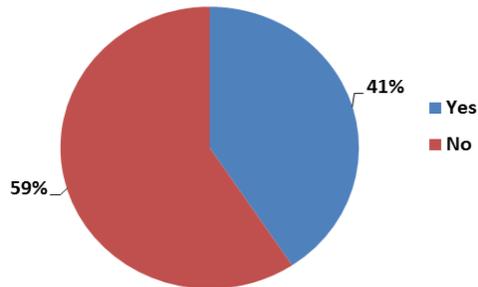


Do you have a 240-V charging station at work?

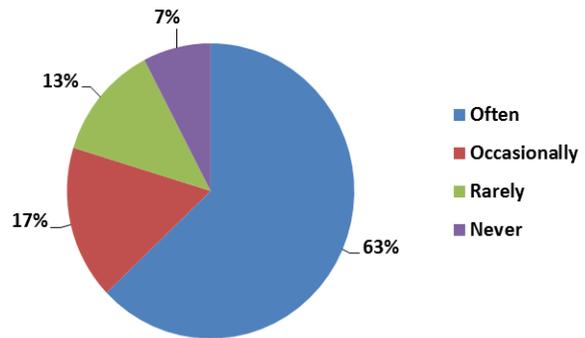
Most respondents (77%) do not have a charging station at work and 59% of the majority say they do not need one. Of the 23% of respondents who do have a charging station at work, 63% said they use it often.



Do you need one?



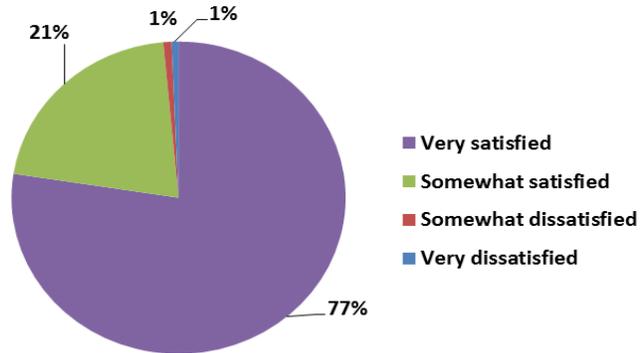
Do you use it...?



SATISFACTION WITH THE ELECTRIC CIRCUIT

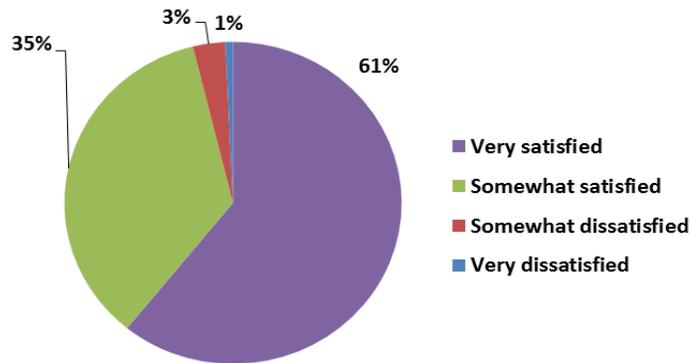
Ease of subscription

Over 98% of respondents said they were satisfied or very satisfied with the ease of subscription to the Electric Circuit.



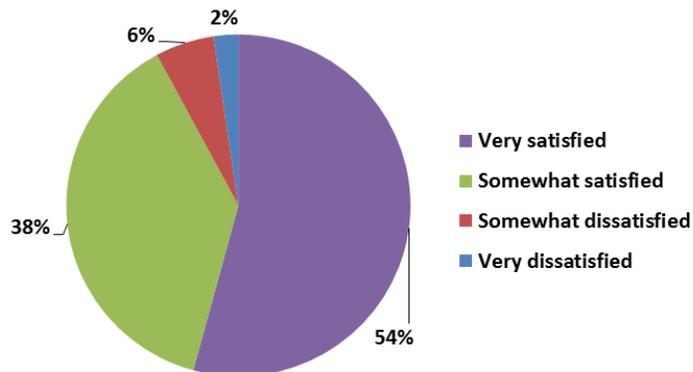
Web site user-friendliness

Nearly the totality of respondents (96%) said they were satisfied or very satisfied with the Web site's user-friendliness.



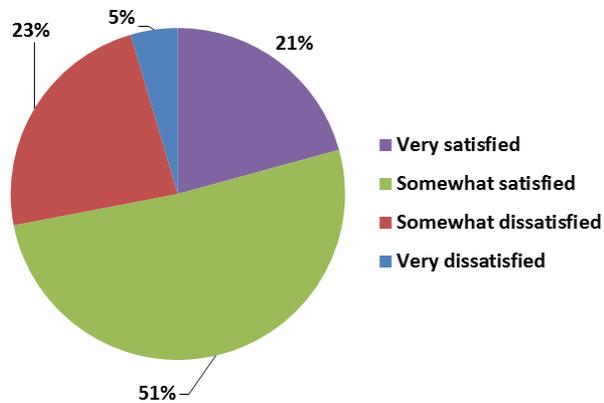
User-friendliness of the mobile app

The vast majority of respondents (92%) said they were satisfied or very satisfied with the mobile app's user-friendliness.



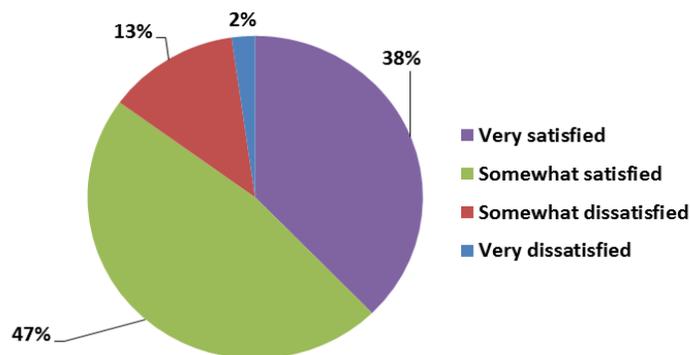
Geographical distribution of charging stations

Satisfaction with the geographical distribution of charging stations has grown (72% satisfied vs 28% dissatisfied) compared with last year when it was more split (63% satisfied vs 37% dissatisfied). The comments received were similar to those from 2015 and point to a need for more fast-charge service points in all regions and in major urban centres, especially to avoid waiting at the charging stations.



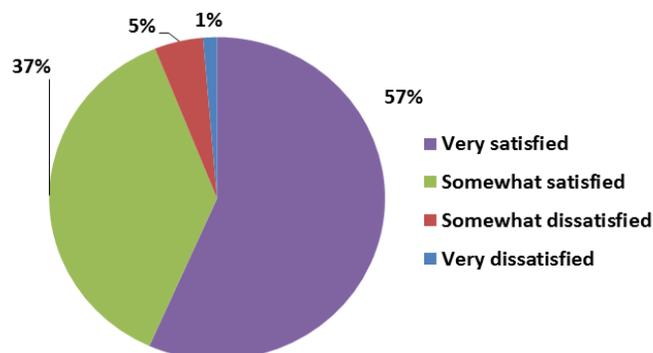
Ease in locating and accessing stations

Respondents said they were satisfied or very satisfied (85%) with the ease of locating and accessing charging stations.



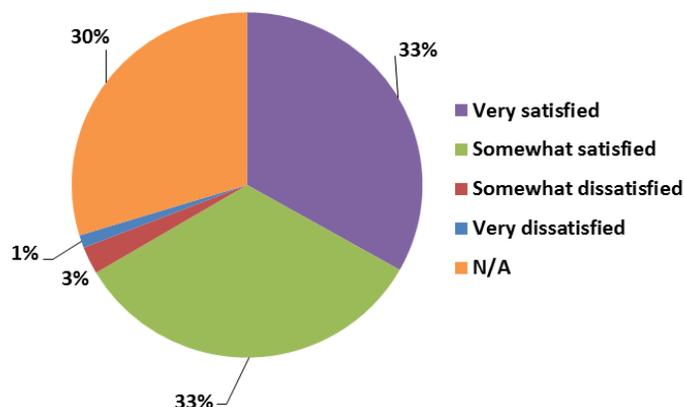
Charging experience

The vast majority of respondents (94%) were very satisfied or somewhat satisfied or very satisfied with their charging experience.



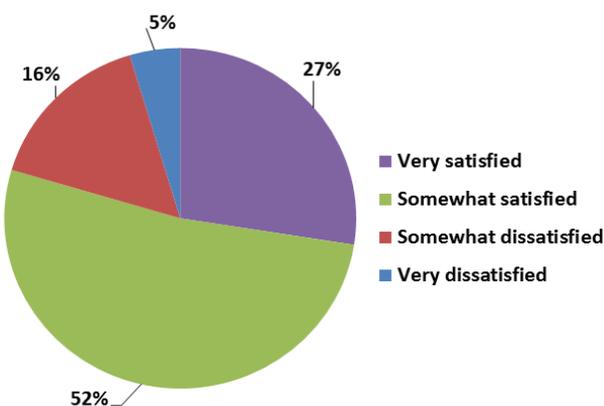
Efficiency and friendliness of customer service offered by CAA-Québec

A third of the respondents (30%) reported that they never used the services of CAA-Québec, which is an increase of the solicitations to this agency, because in 2015, 50% never contacted CAA-Québec. However, almost all respondents who called on CAA-Québec said they were satisfied with the customer service (33% satisfied and 33% very satisfied).



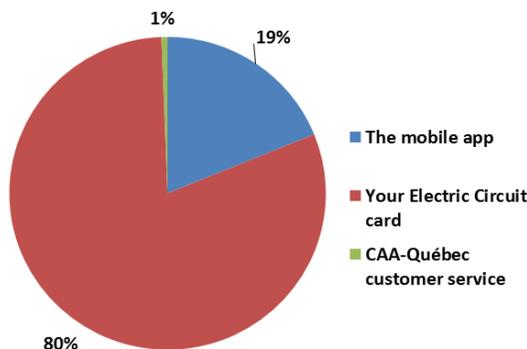
Rates

Satisfaction with charging rates rose slightly compared with 2015, going from 72% to 79%.



When you begin a charge, do you use the mobile app, your Electric Circuit card or CAA-Québec's customer service?

The majority of respondents (80%) use the Electric Circuit card to start their charge. However, there was an increase in the popularity of the mobile app for this purpose, which is now used by 19% of respondents compared with 12% in 2015.



COMMENTS

Some 54% of respondents expressed their views on three main topics.

Fast-charge station deployment

Over two thirds of respondents expressed an interest in more fast-charge stations, but especially in the deployment of several fast-charge stations at a single site.

For 2017, fifty DCFC's are planned to be deployed in some existing sites.

Rates

The comments concerning the 240-volt charging stations are split. Two thirds asked to eliminate the \$2.50 rate, while one third said that the rate of \$1/hour is too expensive. A per kWh rate was also requested, but actually that possibility is not permitted by the regulatory framework.

In terms of fast-charging, Hydro-Québec requested to the Régie de l'Énergie to obtain a special rate for DCFC's in 2017.

Reserved parking for EV

There were a number of comments about gas-powered vehicles being parked in the spots reserved for EV charging. Respondents asked the Electric Circuit to give these vehicles tickets or have them towed. However, parking is managed entirely by our partners (municipalities, businesses or institutions). However, the Electric Circuit regularly educates its partners about this issue.



The Electric Circuit wishes to thank all survey respondents. Their valuable input will help ensure the ongoing improvement of our service offering.