



Energy Transition

Public Opinion Research
Field Dates: April 6, 2023, to May 1, 2023
Release Date: May 10th, 2023

Summary

- 01** While belief in climate change remains steady with past years, *concern* about climate change has been dropping slightly.
- 02** Familiarity with the energy transition has not been growing meaningfully. However, people are more likely to say they are taking steps to shift their energy usage or that they will in the future.
- 03** Opinion is split on whether people would pay more for the energy transition. Across three scenarios of a 1%, 3% or 5% increase in electricity, opinion is split evenly. When it comes to paying 1% more per year, net support is at +10%.
- 04** Support for projects in people's communities hasn't changed much in recent years. A majority of Canadians feel the nearest infrastructure projects are at least a necessary evil if not actually good for the community.
- 05** Public opinion on regulators makes a big difference in whether people are willing to pay more for the energy transition. People who agree the process is transparent, accountable and protects consumers are typically twice as willing to pay more for transition than those who do not.



As climate change impacts grow more severe, is public support for measures to combat climate change growing?

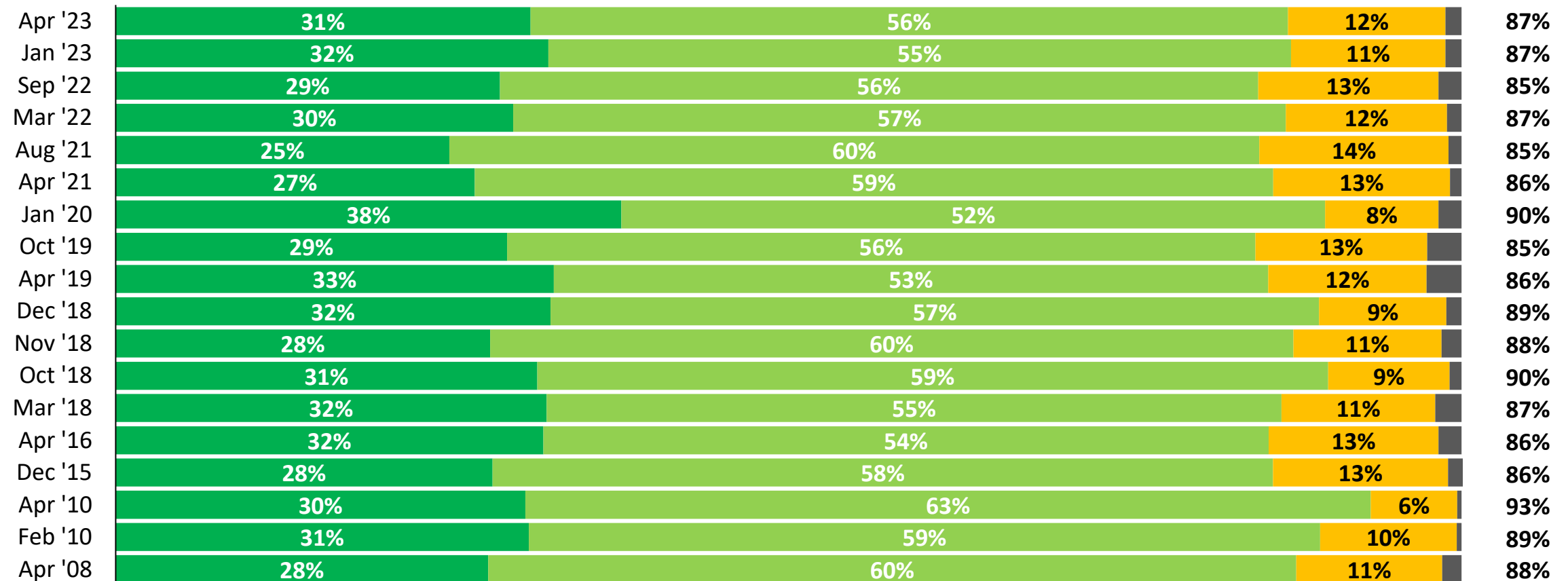
Familiarity with Climate Change: Familiarity with climate change remains high and steady with nearly 9-in-10 (87%) being familiar with it



How familiar are you with the concept of climate change?

[asked of all respondents; n=2,000]

% Familiar
(Detailed + General
Understanding)



■ You have a detailed understanding of climate change

■ You have heard of climate change but don't know much about it

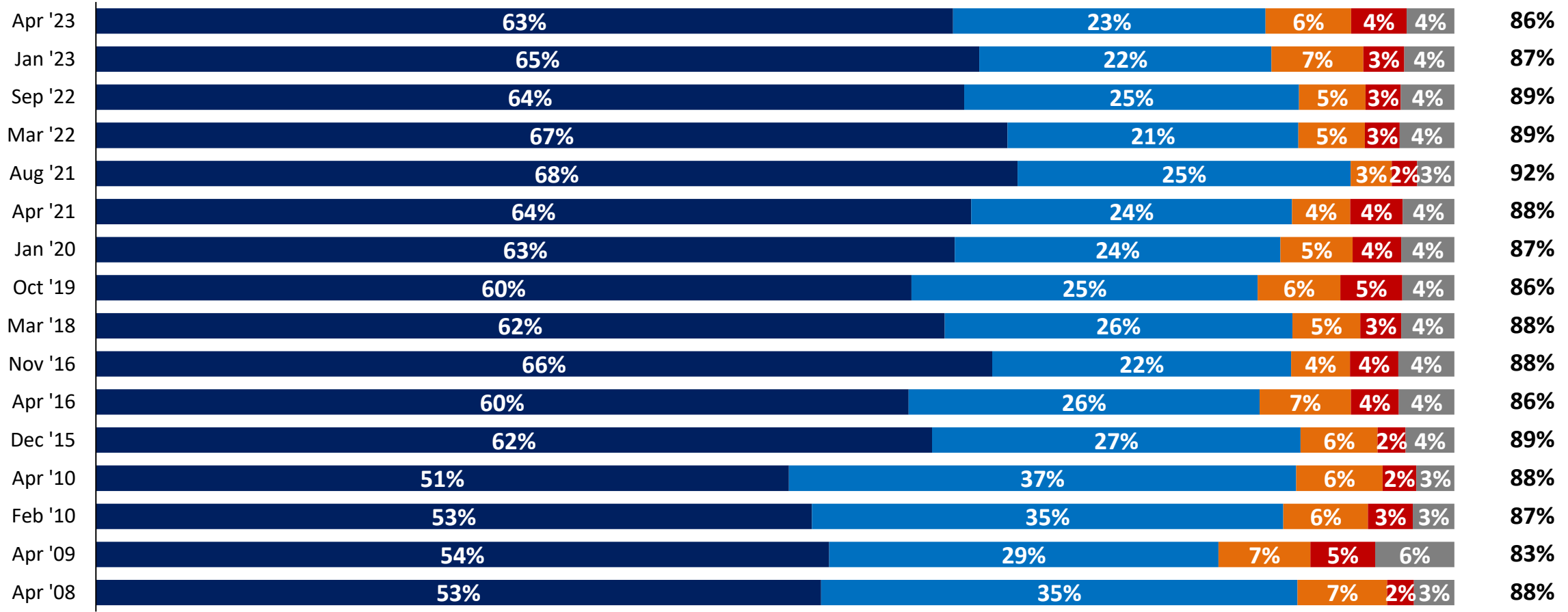
■ You have a general understanding of climate change but don't know the details

■ You haven't heard of climate change before this survey

Belief in Climate Change: Belief in climate change remains steady with nearly 2-in-3 (63%) saying 'climate change is definitely occurring'

Thinking about your own personal view, do you believe that...
[asked of all respondents; n=2,000]

% At least probably occurring



■ Climate change is definitely occurring
 ■ Climate change is probably occurring
 ■ Climate change is probably not occurring
■ Climate change is definitely not occurring
 ■ Don't know



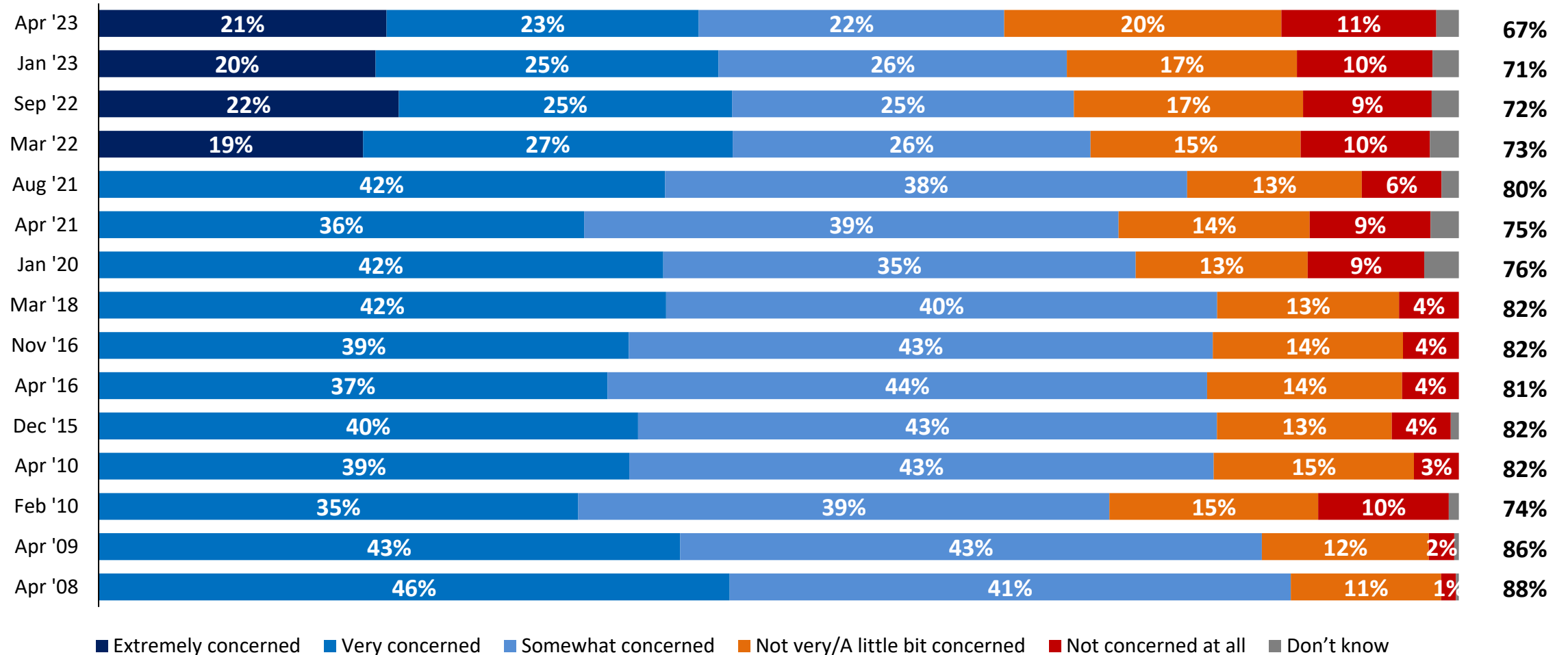
Concern about Climate Change: Since last wave of tracking, concern about climate change has dropped 4 pts from 71% to 67%



How concerned are you about climate change?

[asked of all respondents; n=2,000]

% Concerned

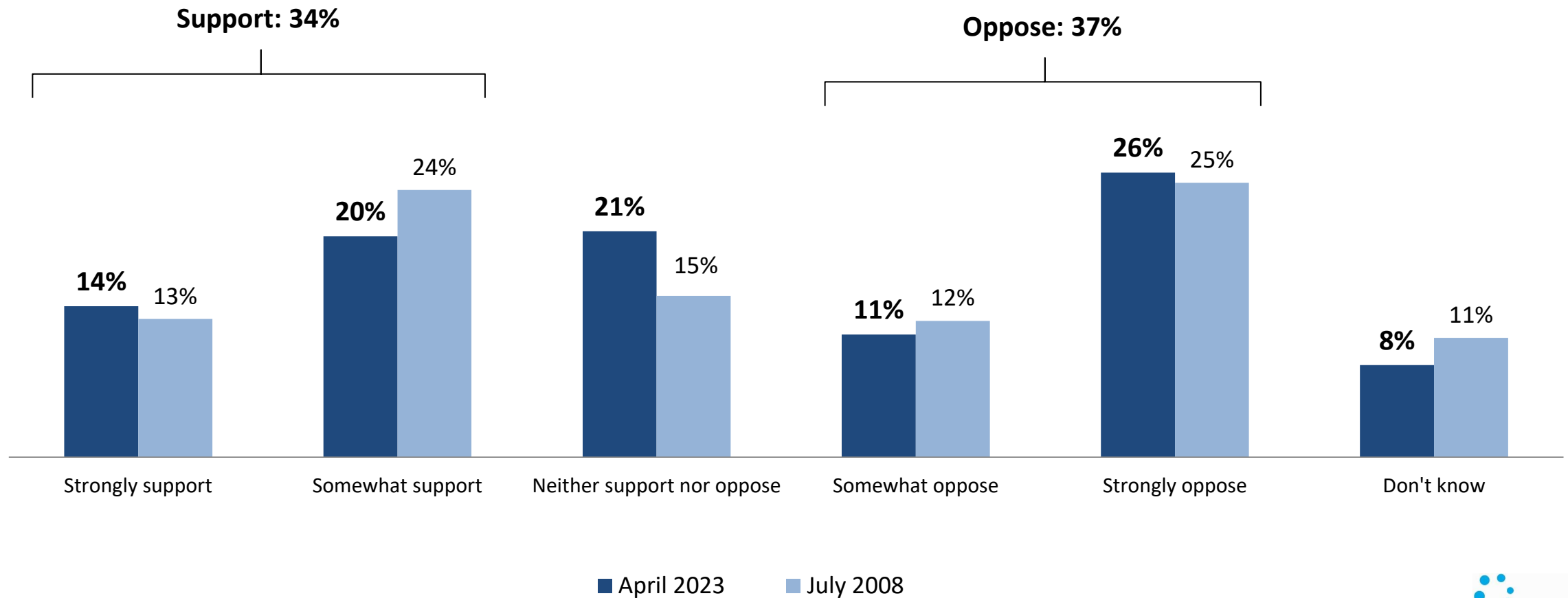


Support for Carbon Tax: Since 2008, the level of support for carbon tax has remained steady with a marginal decrease of 3 points



Do you support or oppose the idea of a carbon tax?

[asked of all respondents; n=2,000]



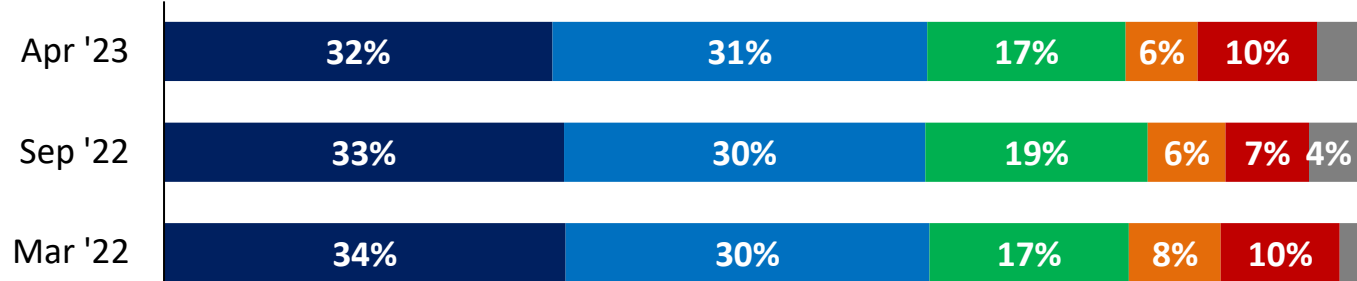
Attitudes: Net agreement with reducing GHG emissions even if it means losing jobs is down 8 pts from 25% to 17%



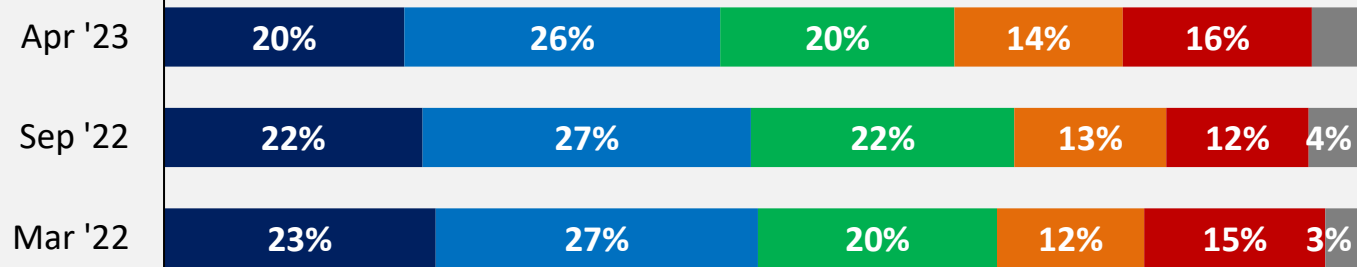
Do you agree or disagree with the following statements?
[asked of all respondents; n=2,000]

Net Agree

Canada should be a leader on reducing greenhouse gas emissions even if other countries are not keeping up



We need to reduce greenhouse gas emissions as quickly as possible, even if it means job losses or paying more for energy



Canada should only act on climate change if other bigger greenhouse gas emitting countries join us in reducing emissions



■ Strongly agree
 ■ Somewhat agree
 ■ Neither agree nor disagree
 ■ Somewhat disagree
 ■ Strongly disagree
 ■ Don't know



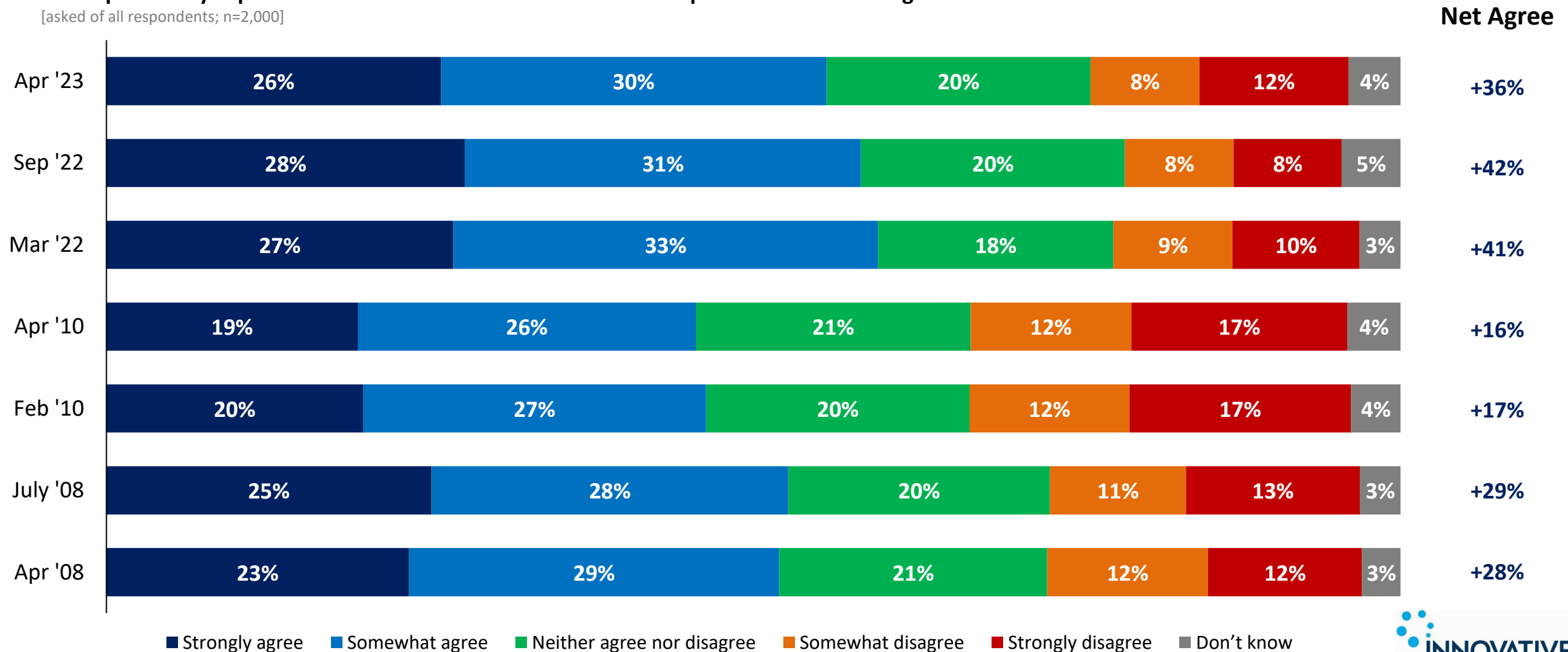
Proof of Climate Change: Net agreement that unusual weather is proof⁹ of climate change is down 6 points from 42% to 36%



Do you agree or disagree with the following statement?

I have personally experienced unusual weather that I feel is clear proof of climate change

[asked of all respondents; n=2,000]



Strongly agree Somewhat agree Neither agree nor disagree Somewhat disagree Strongly disagree Don't know

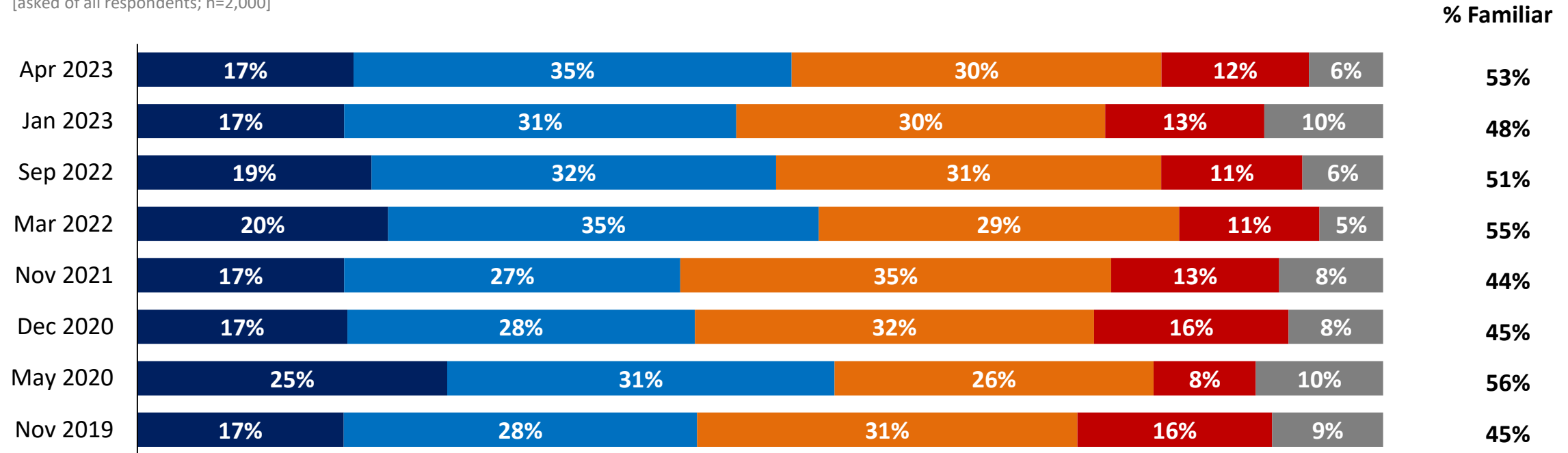
Energy Transition Familiarity Tracking: Familiarity with energy transition is up 5 pts from 48% to 53% since January



One issue people have been talking about lately is the idea that Canada and the world may be transitioning from its current energy system that depends highly on carbon-based fossil fuels like coal, oil and gas to a lower-carbon energy system.

How familiar are you with the idea of transitioning from its current energy system that depends highly on carbon-based fuels to a lower-carbon energy system?

[asked of all respondents; n=2,000]



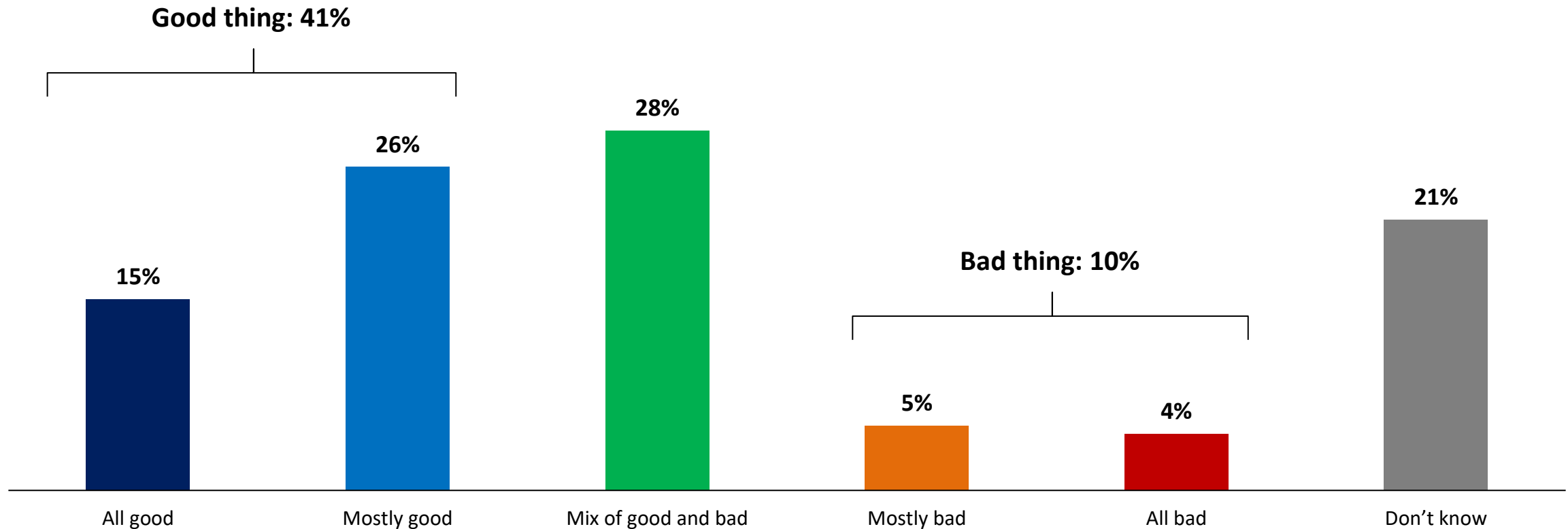
- I understand the details and can explain them to others
- I am familiar with the idea of an energy transition but cannot explain it to others
- I have heard of the idea of an energy transition but I don't know the details
- I have not heard about the idea of an energy transition before this survey
- Don't know

Impression of Energy Transition: 2-in-5 (41%) say energy transition sounds like a good thing while only 10% say it sounds like a bad thing



From what you know or based on your first impression, does energy transition sound like a good thing or a bad thing?

[asked of all respondents; n=2,000]

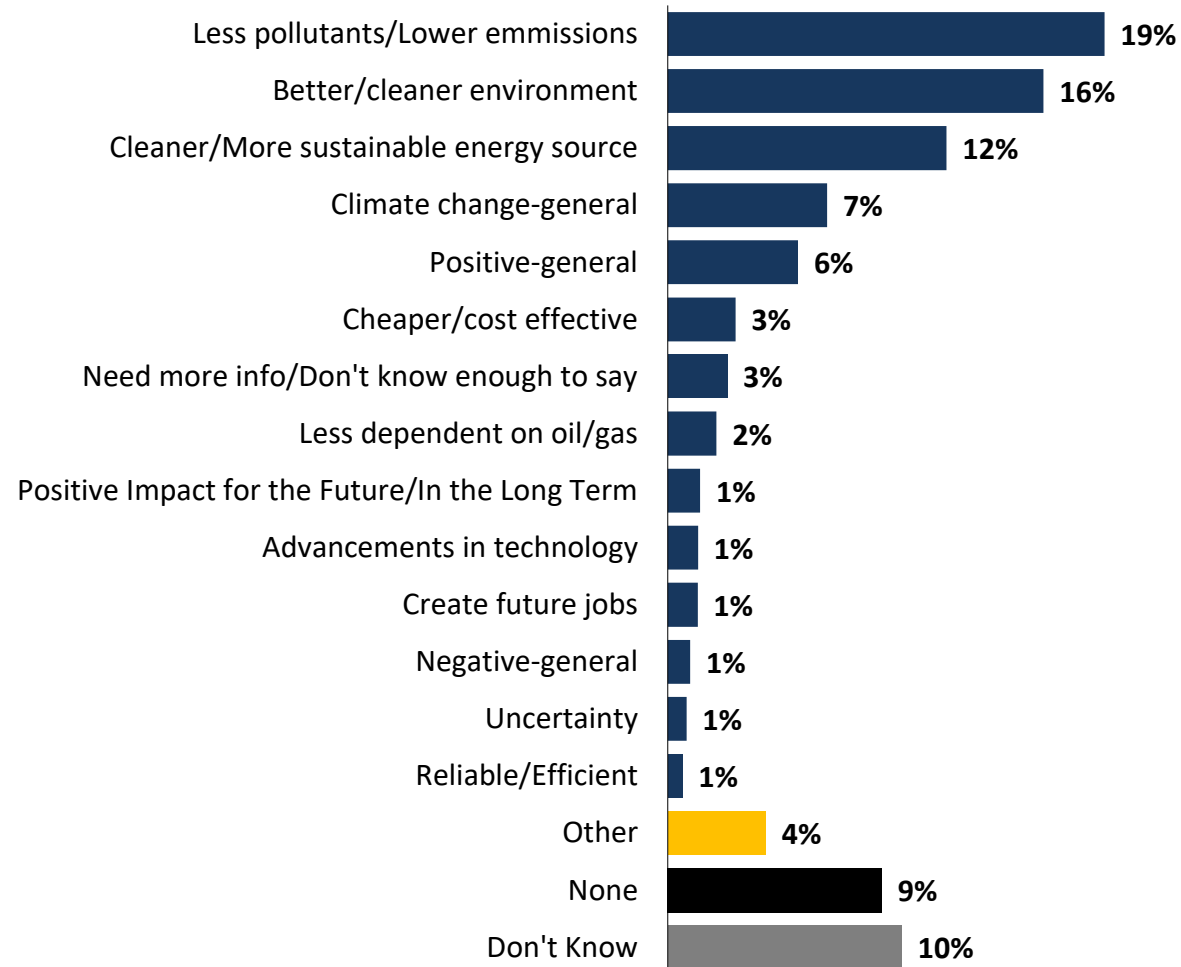


Good Things: Less pollutants/lower emissions is the top good thing about energy transition, followed by a better/cleaner environment



What good things come to mind? [OPEN]

[asked of those who said good, mix of good and bad or mostly bad; n=1,911]



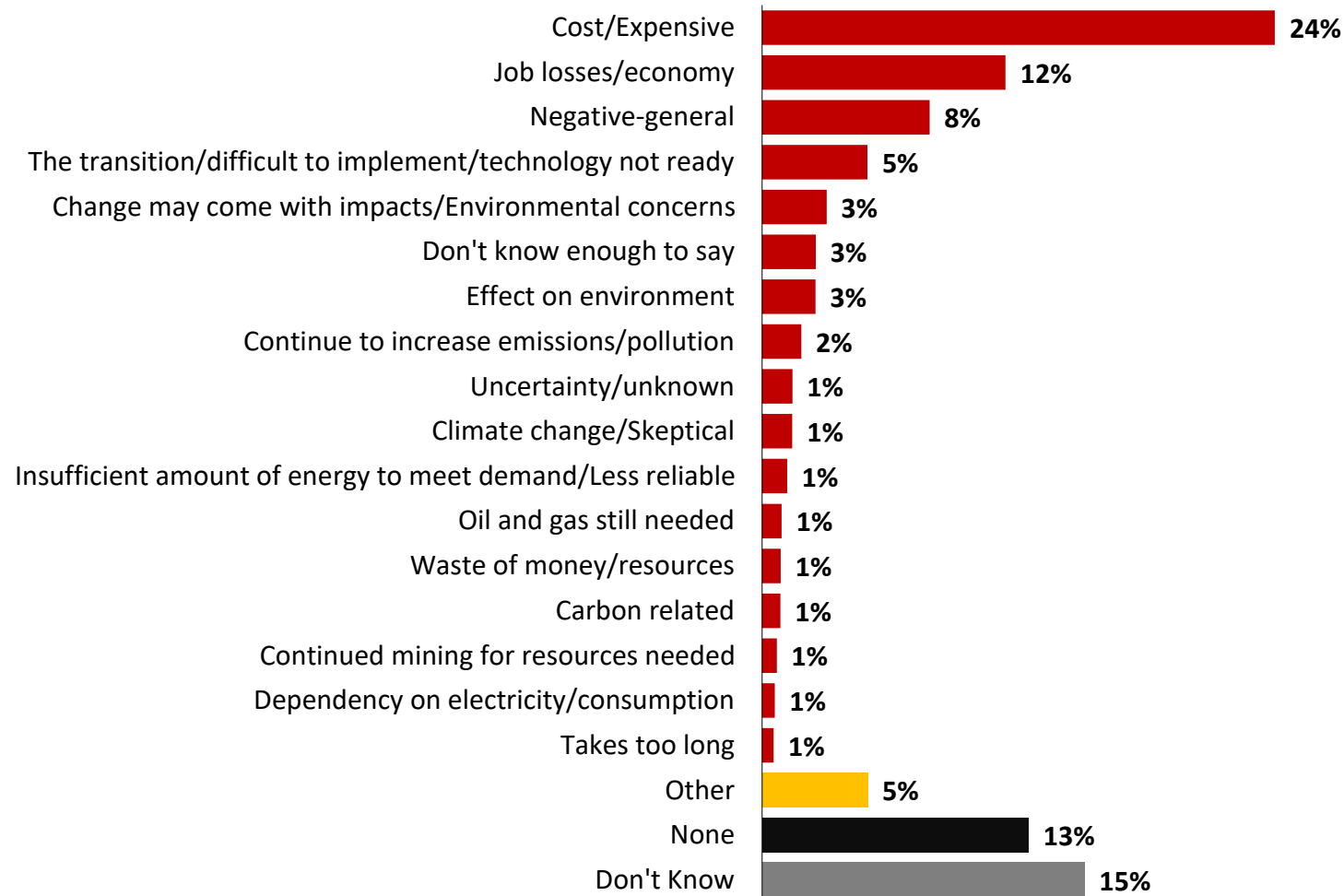
NOTE: "Refused" (1%) not shown.

Bad Things: Energy transition being too costly/expensive is the top bad thing, followed by fear of job losses and impacts on the economy



What bad things come to mind? [OPEN]

[asked of those who said bad, mix of good and bad or mostly good; n=1,698]



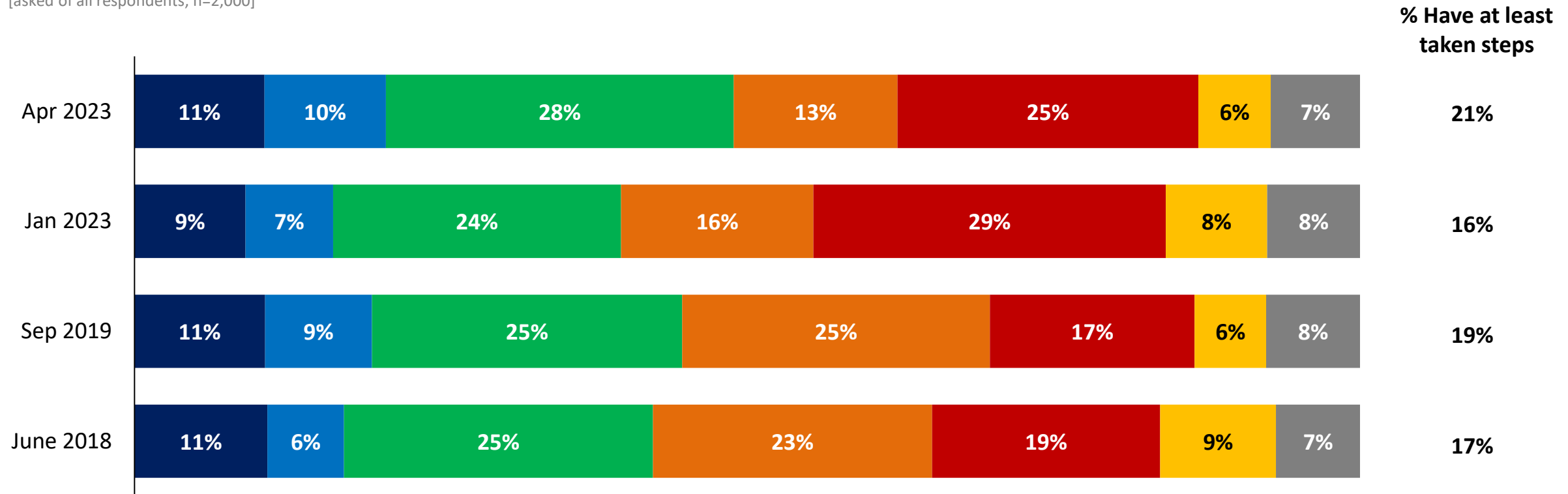
NOTE: "Refused" (1%) not shown.

Energy Shift: Those have done it or taken steps towards shifting energy sources is up 5 pts from 16% to 21% since January



When you think about all your energy bills, have you ever considered shifting from one energy source to another to save money or reduce your impact on the environment? For example, changing from using natural gas to electricity to heat a home, or from a gas-fuelled personal vehicle to an electric vehicle?

[asked of all respondents; n=2,000]



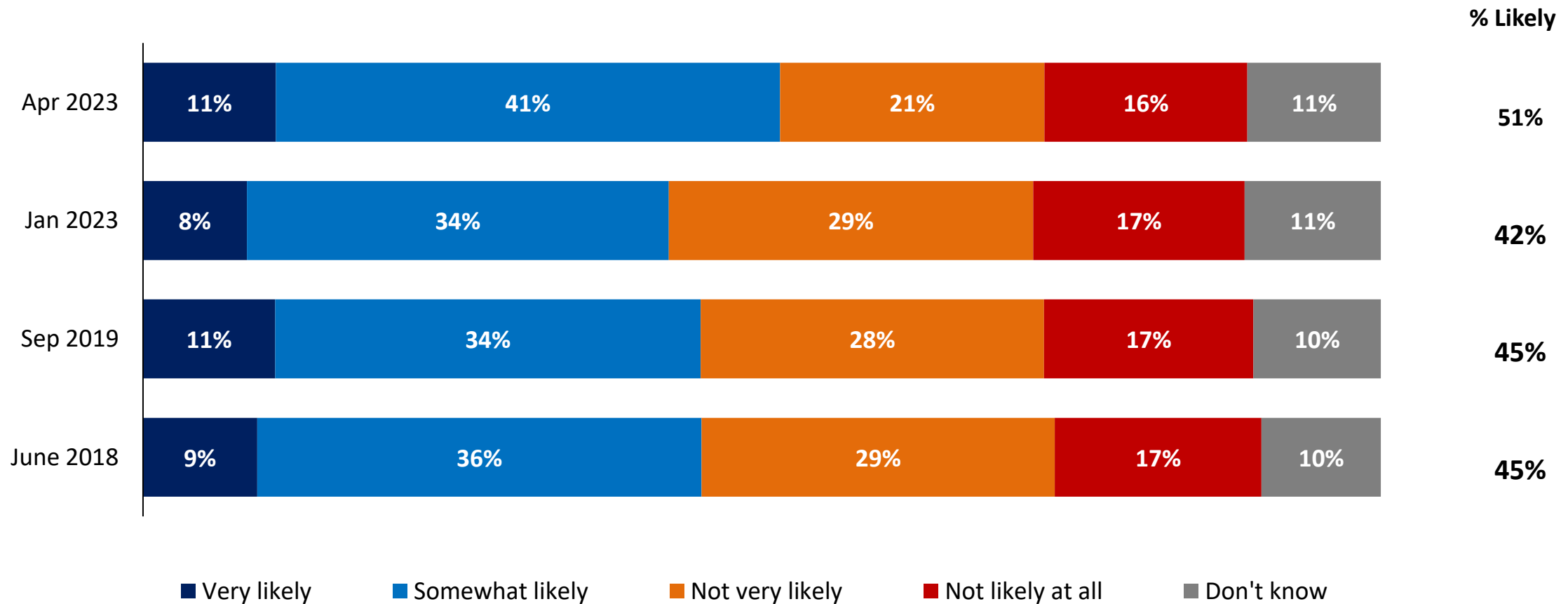
- Yes, I have done it
- I am actively taking steps in this direction
- I am thinking about it
- I have thought about it, but didn't end up switching
- I have never thought about it
- Other
- Don't know



NOTE: Prior to April 2023, the question was asked if respondents had considered “for example, changing from an electric dryer to a gas dryer.”

Likelihood to Shift Tracking: Over half say they are likely to consider shifting energy sources; highest since tracking began

Q How likely would you be to consider shifting from one energy source to another in the future?
[asked of those who have thought of switching, didn't switch or never thought about it; n=1,326]



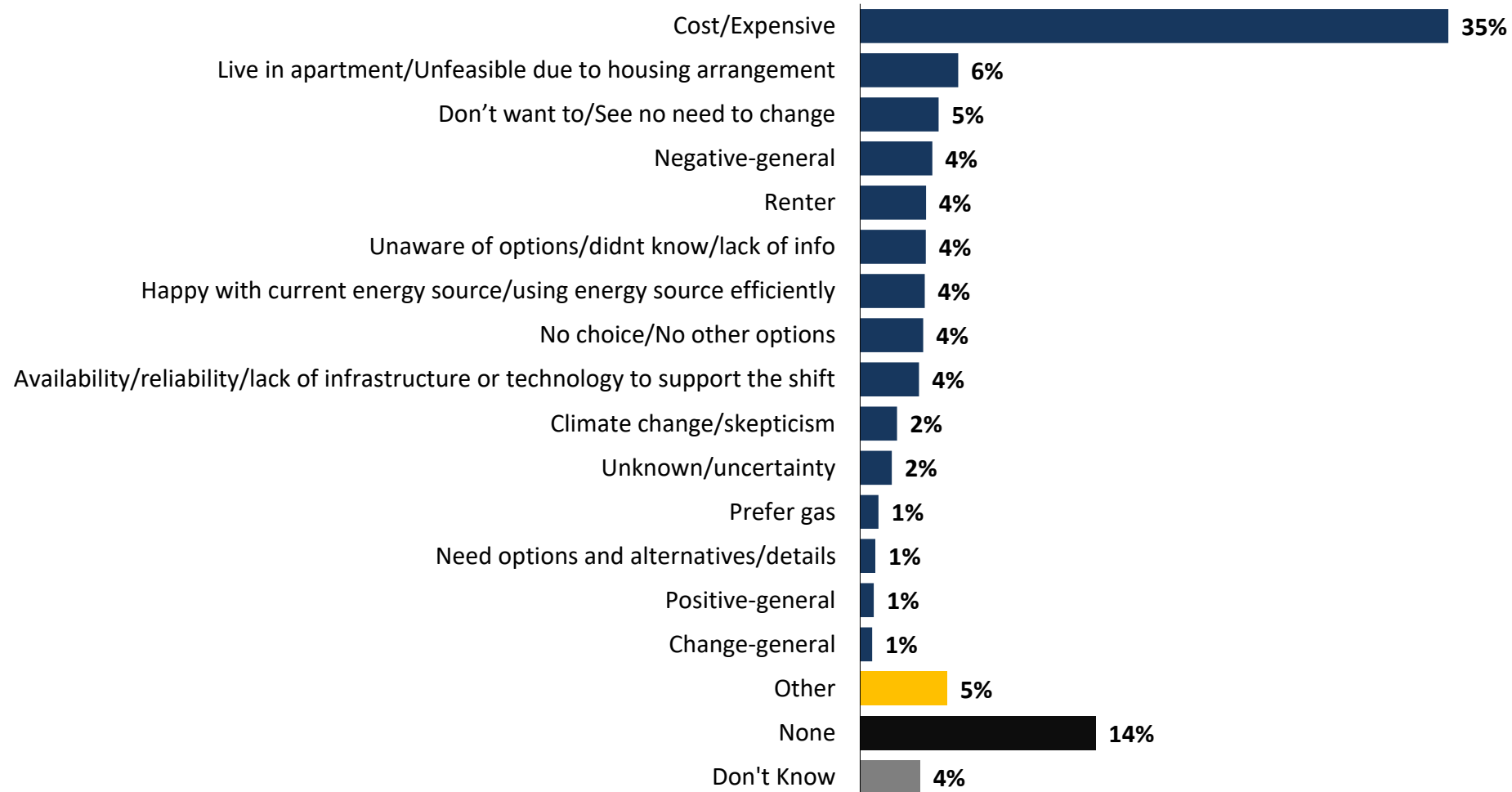
Barriers to Energy Transition: Cost/the shift being expensive is the top reason preventing respondents from shifting energy sources



Is there anything in particular that is holding you back from shifting from one energy source to another in the future? Please be as specific as possible.

[OPEN]

[asked of those who are not likely to shift or don't know; n=642]

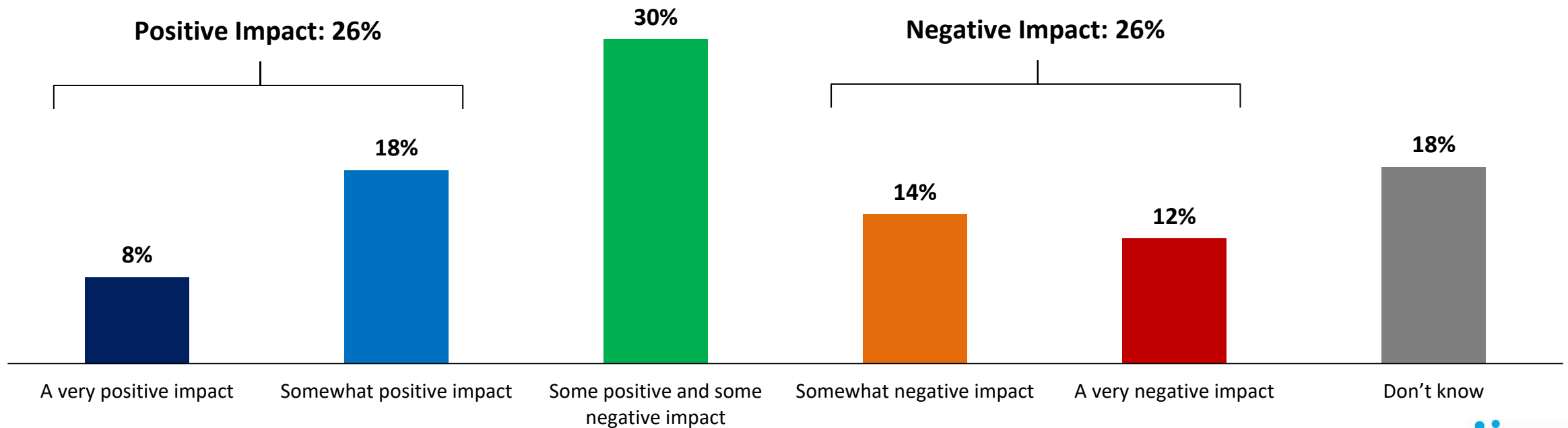


NOTE: "Refused" (1%) not shown.

Energy Transition Impact: Canadians are divided over the impact of the energy transition on their household finances



From what you know or based on your first impression, what impact do you expect the energy transition to have on your household financial situation?
[asked of all respondents; n=2,000]

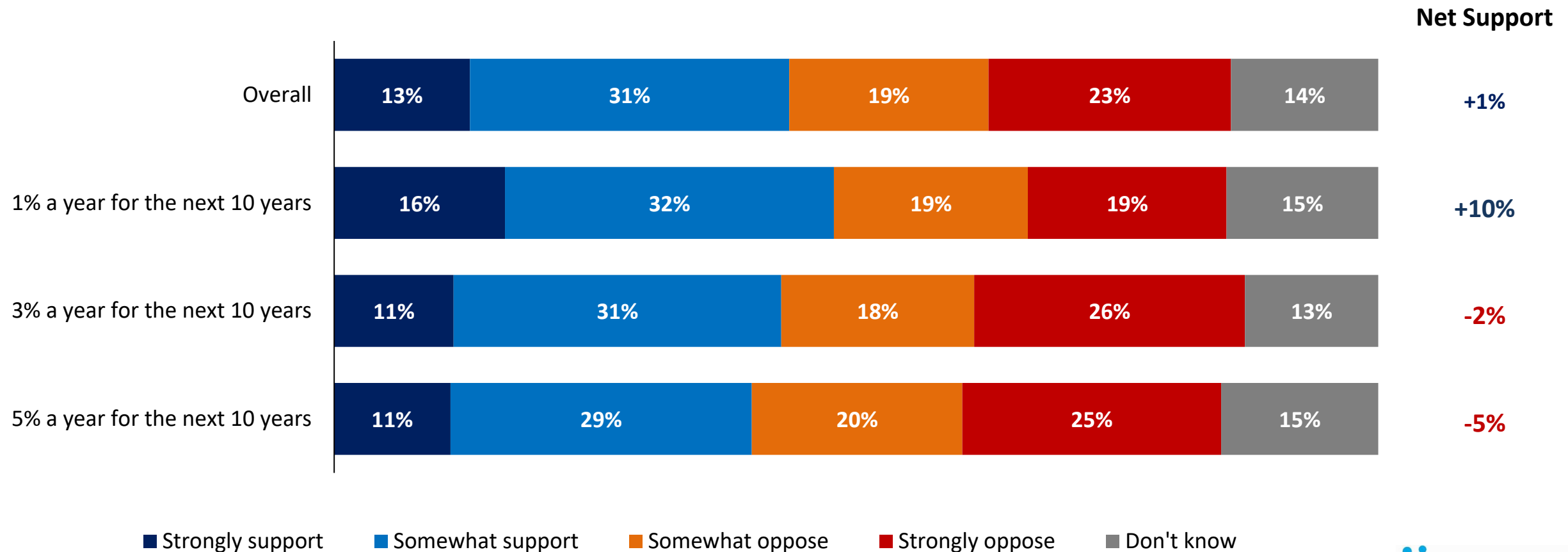


Electrification Pricing: Overall, net support for a bill increase is split; highest support for a marginal increase of 1%



To implement the energy transition, electricity prices will have to rise to pay for expanding the electricity grid with non-emitting generation. You might be able to offset some of these costs by reducing the amount of automotive fuel or home heating fuel you currently purchase. The more we pay in electricity rates, the quicker we can implement the energy transition. Do you support or oppose investments to enable electrification, if in addition to routine increases, your electricity bill will grow by:

[asked of all respondents; n=2,000]

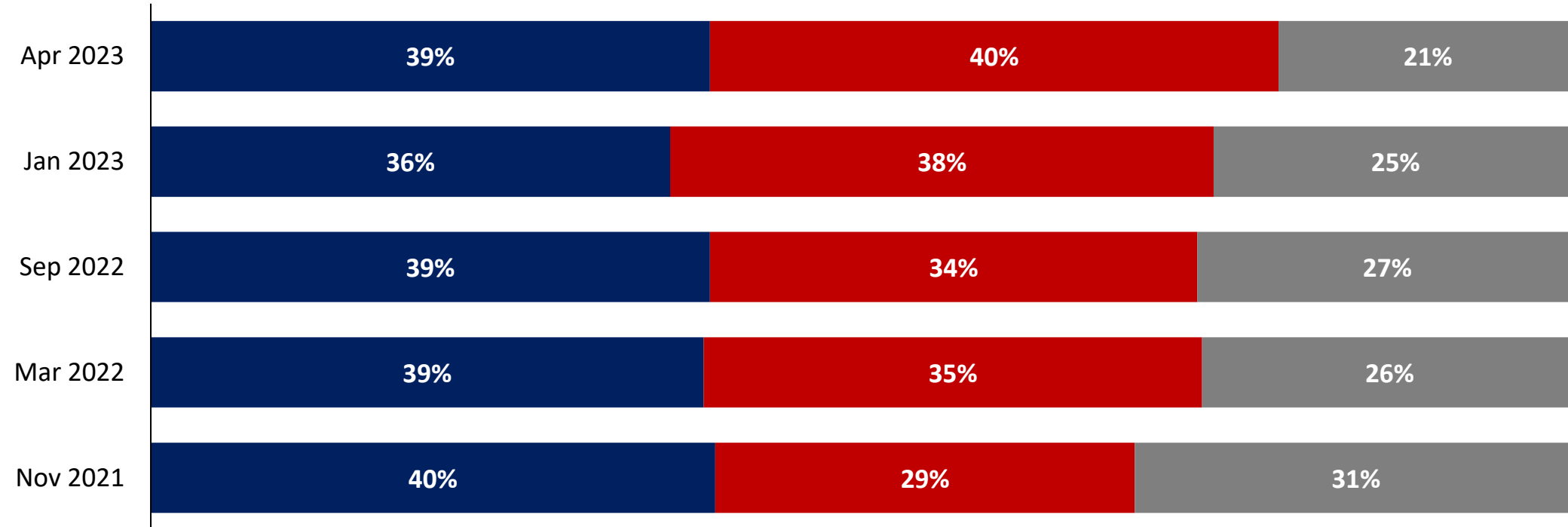


Energy Transition Attitudes Tracking: Transition-skeptic narrative has gained 11 points in 18 months



Based on what you know about an energy transition, which of the following statements is closest to your point of view?

[asked of all respondents; n=2,000]



- Government policies to accelerate the transition away from oil and gas show Canada is a leader on climate change and help make the world better for future generations.
- Government policies to accelerate the transition away from oil and gas risk increasing the cost of living and losing jobs in Canada, and aren't likely to have a significant impact on climate change.
- Don't know



Is it getting harder to secure public support to build energy infrastructure in Canada?

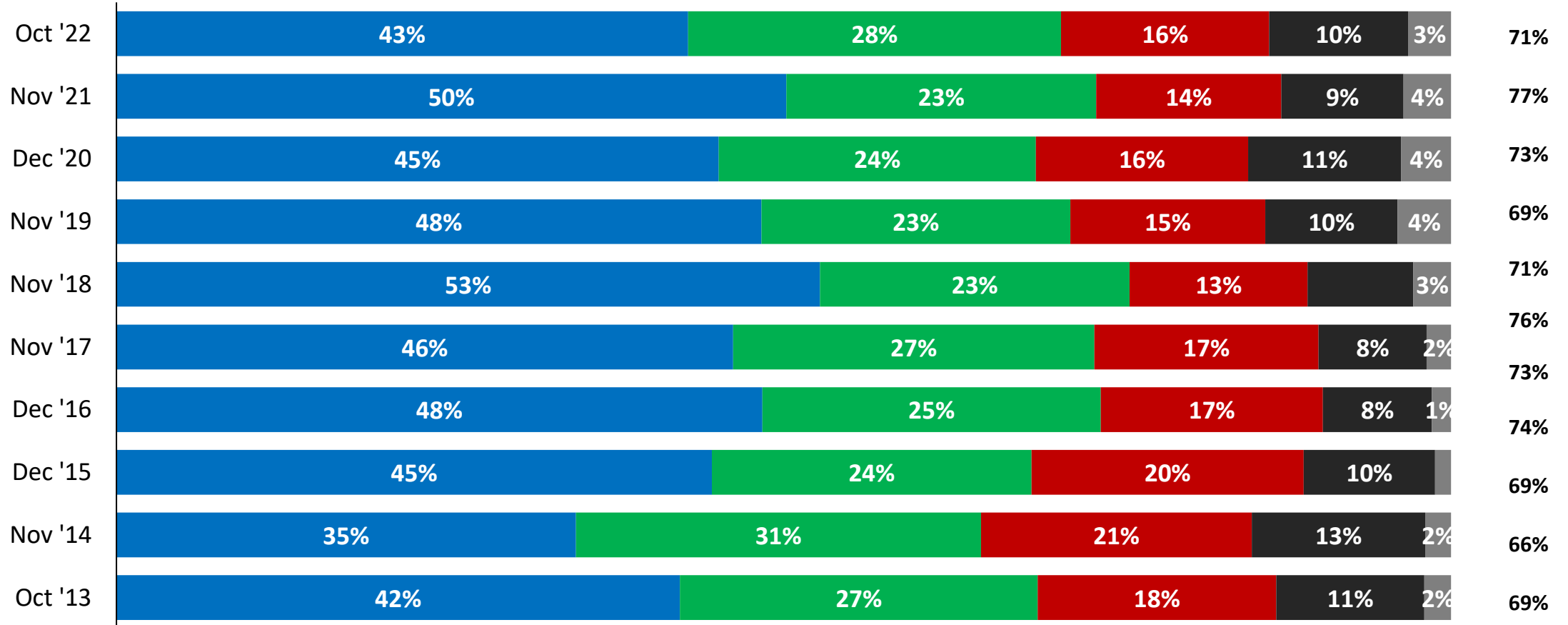
Social Permission: Social permission for projects close to people's homes has been relatively stable in the past few years



Which of the following best represents your view of that project?
[asked of those with proposed developments near home, n=833]

Asked of people with projects close to their homes

**Total Permission
(support + necessary)**



- It's a good thing for the community and I support it
- I don't like it but I think it is necessary
- It's a bad thing for the community and I oppose it
- I don't feel I know enough to judge this project
- Don't know



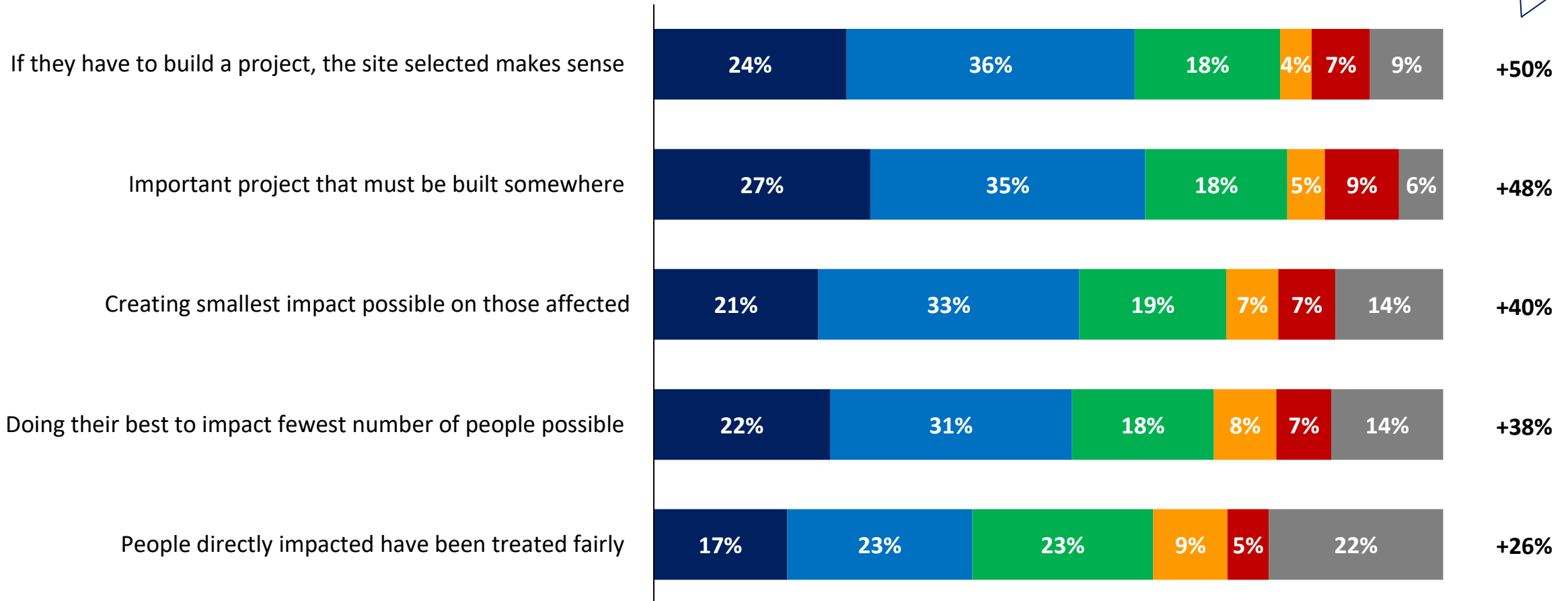
The Hurdles: Agreement is highest on ‘the site selected makes sense’ and ‘the project must be built somewhere’



Do you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements?

[asked of those with proposed developments near home, n=833]

Net Agree

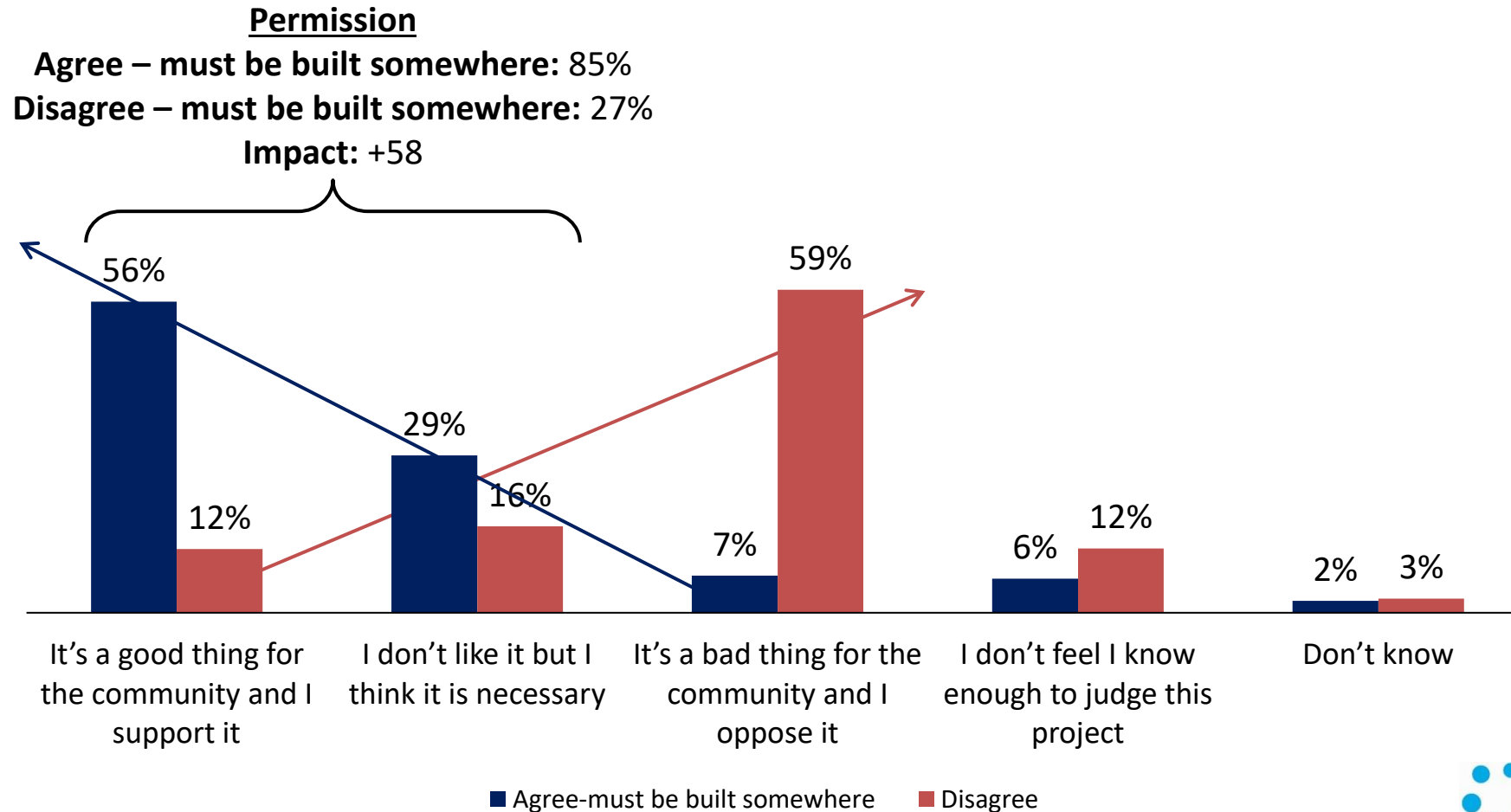


■ Strongly agree
 ■ Somewhat agree
 ■ Neither agree nor disagree
■ Somewhat disagree
 ■ Strongly disagree
 ■ Don't know

1. Need?: 85% of people who say 'this is an important project that has to be built somewhere' give social permission to the project



'Which of the following best represents your view of that project' **BY** 'This is an important project that has to be built somewhere'
[asked of those with proposed developments near home, n=833]

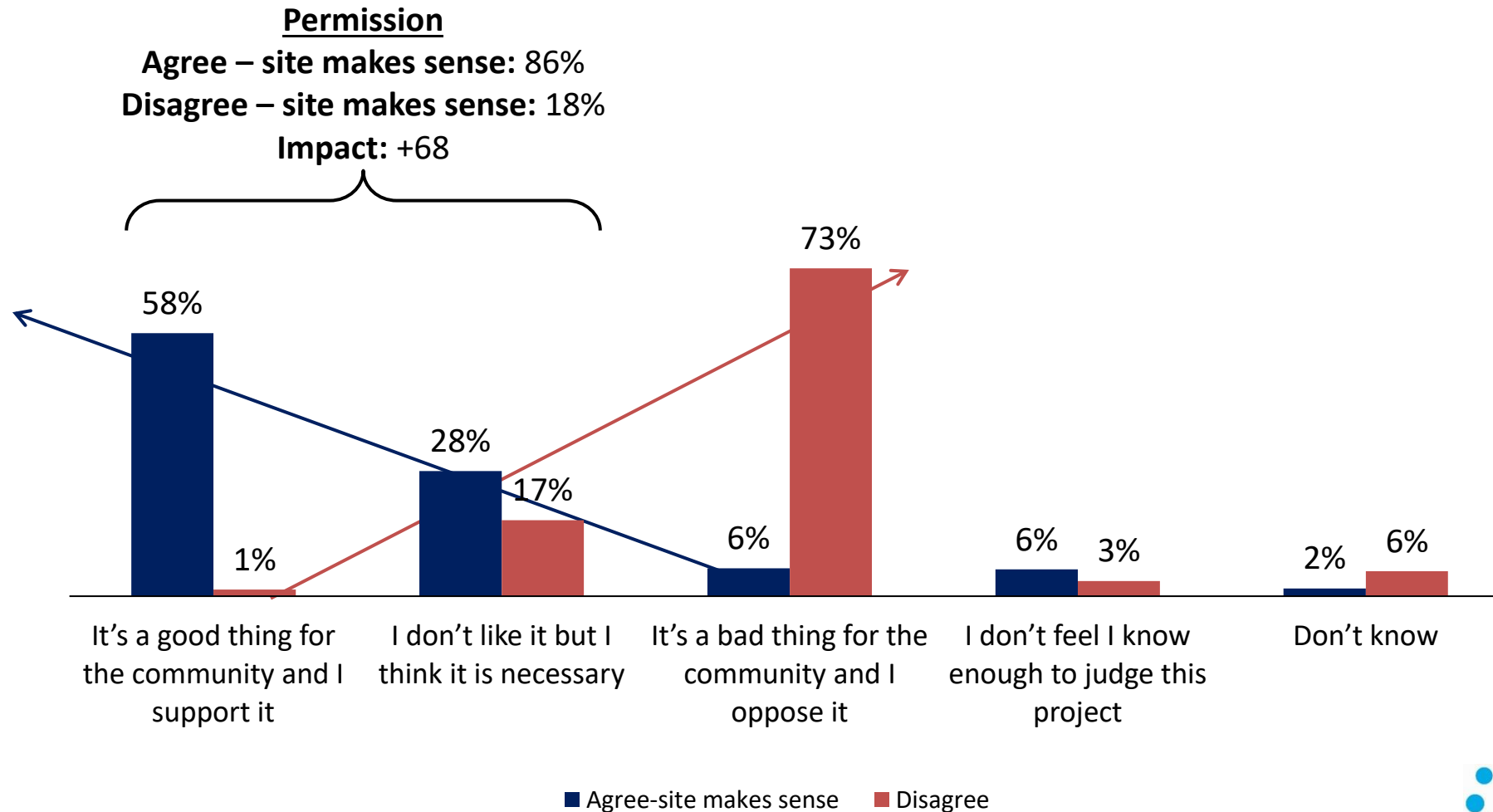


Note: 'Don't know' if project is important not shown

2. Best Option?: 86% of people who say 'the site they are using makes sense' give social permission to the project ²⁴



'Which of the following best represents your view of that project' **BY** 'If they are going to build a project like that, the site they are using makes sense'
[asked of those with proposed developments near home, n=833]



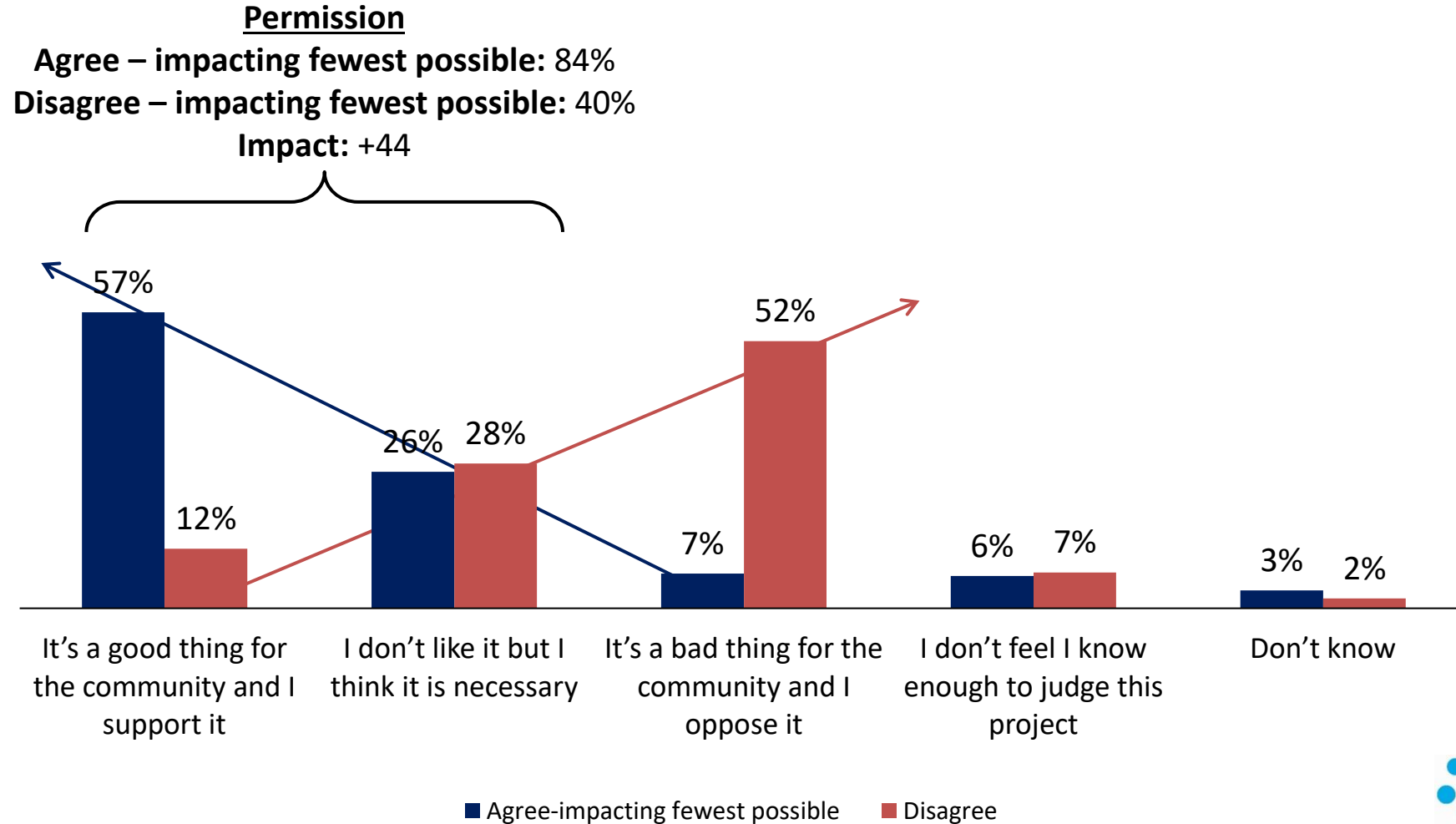
Note: 'Don't know' if site makes sense not shown

3. Impact Fewest?: 84% of people who agree that ‘the builders are doing their best to impact the fewest people’ give social permission



‘Which of the following best represents your view of that project’ **BY** ‘The builders of this project are doing their best to impact the fewest number of people possible’

[asked of those with proposed developments near home, n=833]

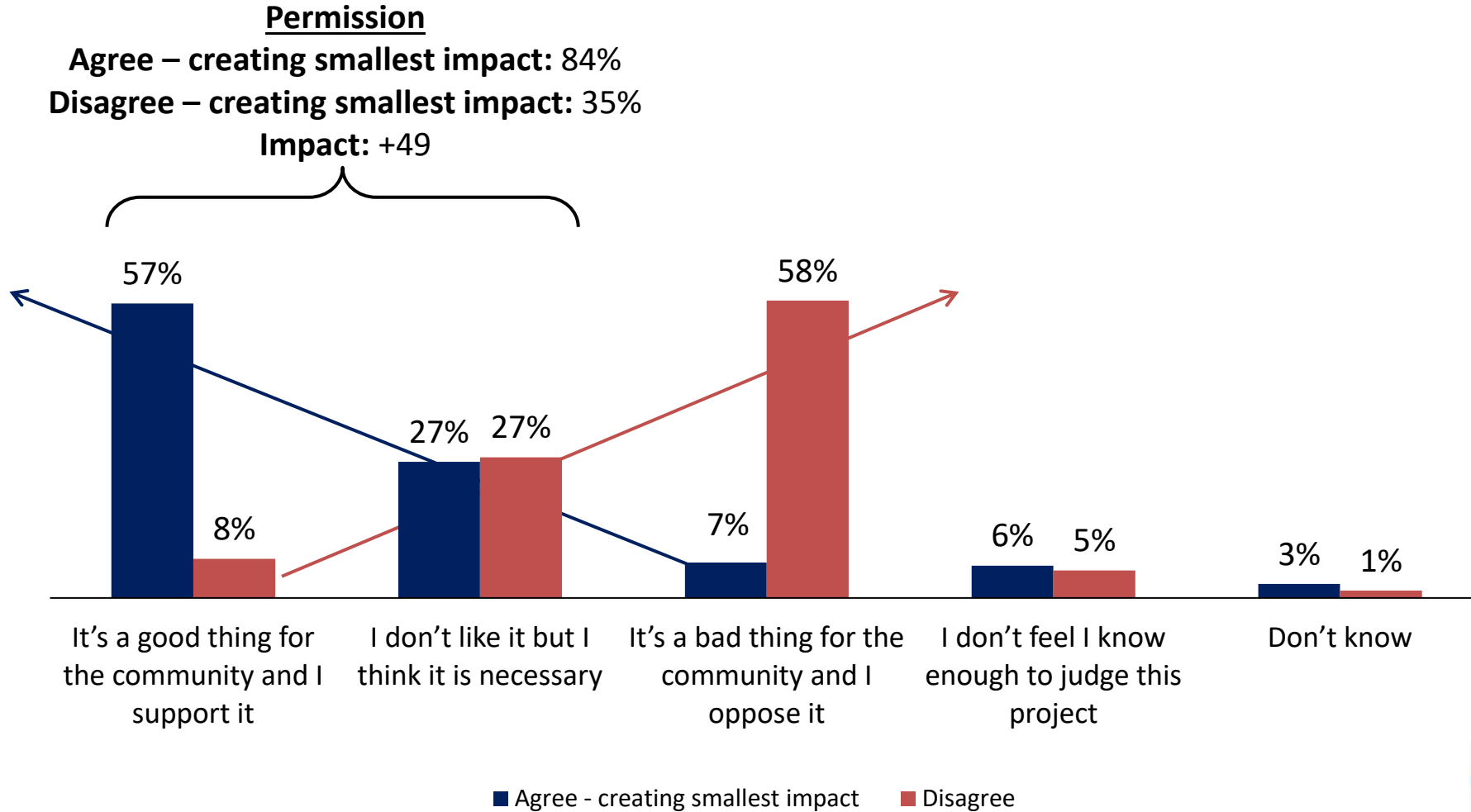


4. Creating the Smallest Impact?: 83% of people who say 'doing their best to create the smallest impact' give social permission



'Which of the following best represents your view of that project' **BY** 'The builders of this project are doing their best to create the smallest impact possible on those who had to be affected'

[asked of those with proposed developments near home, n=833]

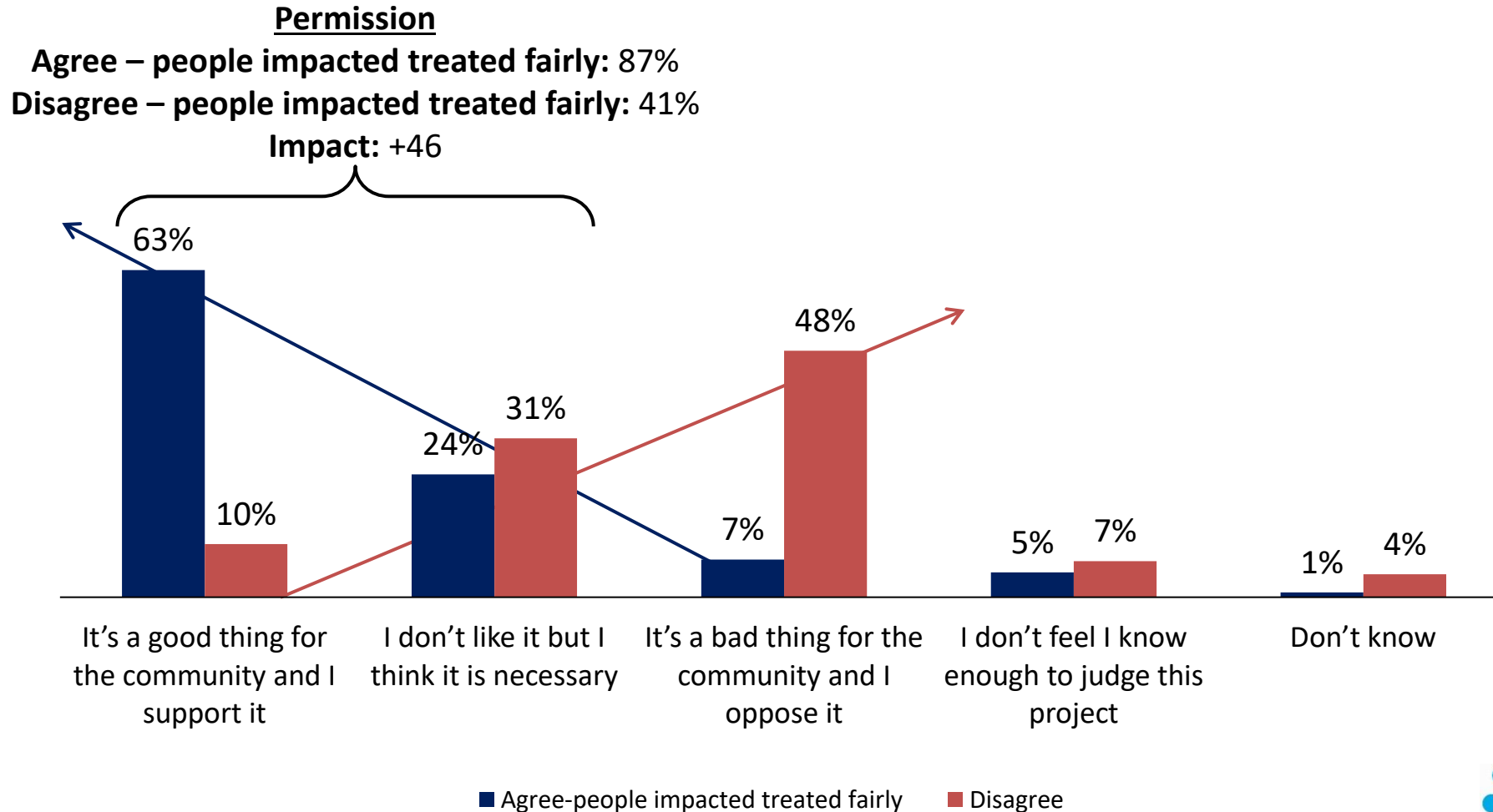


Note: 'Don't know' about impact not shown


5. Treating People Fairly?: 87% of people who agree that 'the people impacted have been treated fairly' give social permission



'Which of the following best represents your view of that project' **BY** 'The people impacted by the project have been treated fairly'
[asked of those with proposed developments near home, n=833]



Note: 'Don't know' about fair treatment not shown



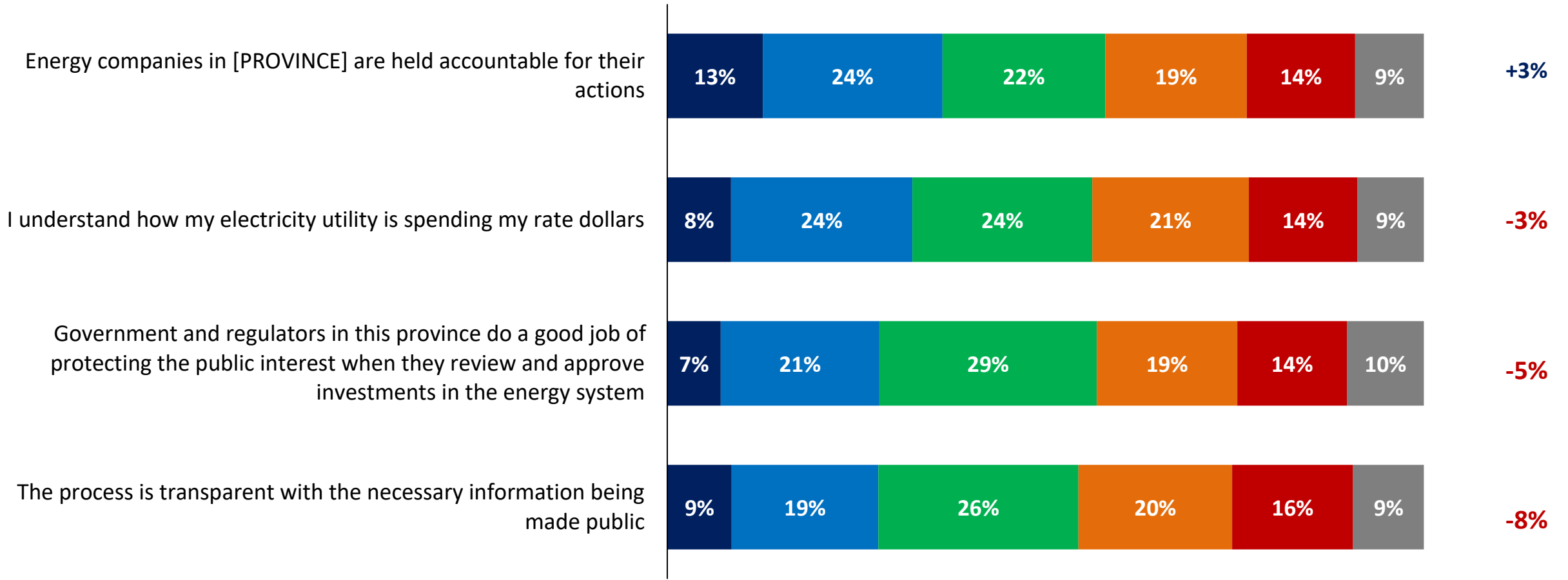
Can energy regulators can make a major difference to public support for the energy transition?

Regulator Attitudes: Canadians are divided on whether key regulatory outcomes are being delivered or not



Do you agree or disagree with the following statements?
[asked of all respondents; n=2,000]

Net Agree



■ Strongly agree
 ■ Somewhat agree
 ■ Neither agree nor disagree
 ■ Somewhat disagree
 ■ Strongly disagree
 ■ Don't know

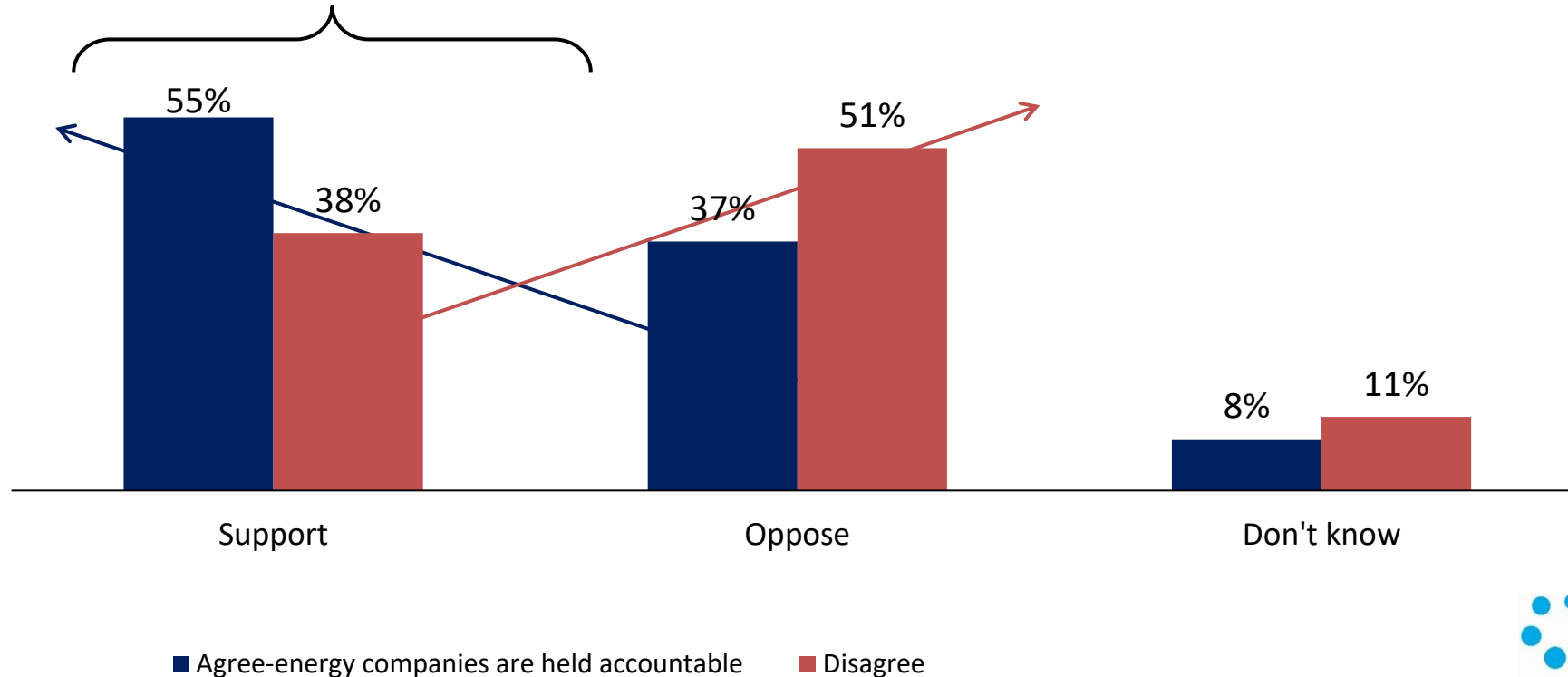


Willingness to Pay BY Energy Companies are Held Accountable: 55% of those who say energy companies held accountable would pay more



Willingness to Pay **BY** Energy Companies are Held Accountable
[asked of all respondents; n=2,000]

Support
Agree – energy companies are held accountable: 55%
Disagree – energy companies are held accountable: 38%
Impact: +17



Willingness to Pay BY Understanding Utility Spending: 63% of those who understand how utilities are spending say they would pay more



Willingness to Pay **BY** Familiarity on how Consumer Rate Dollars are Spent

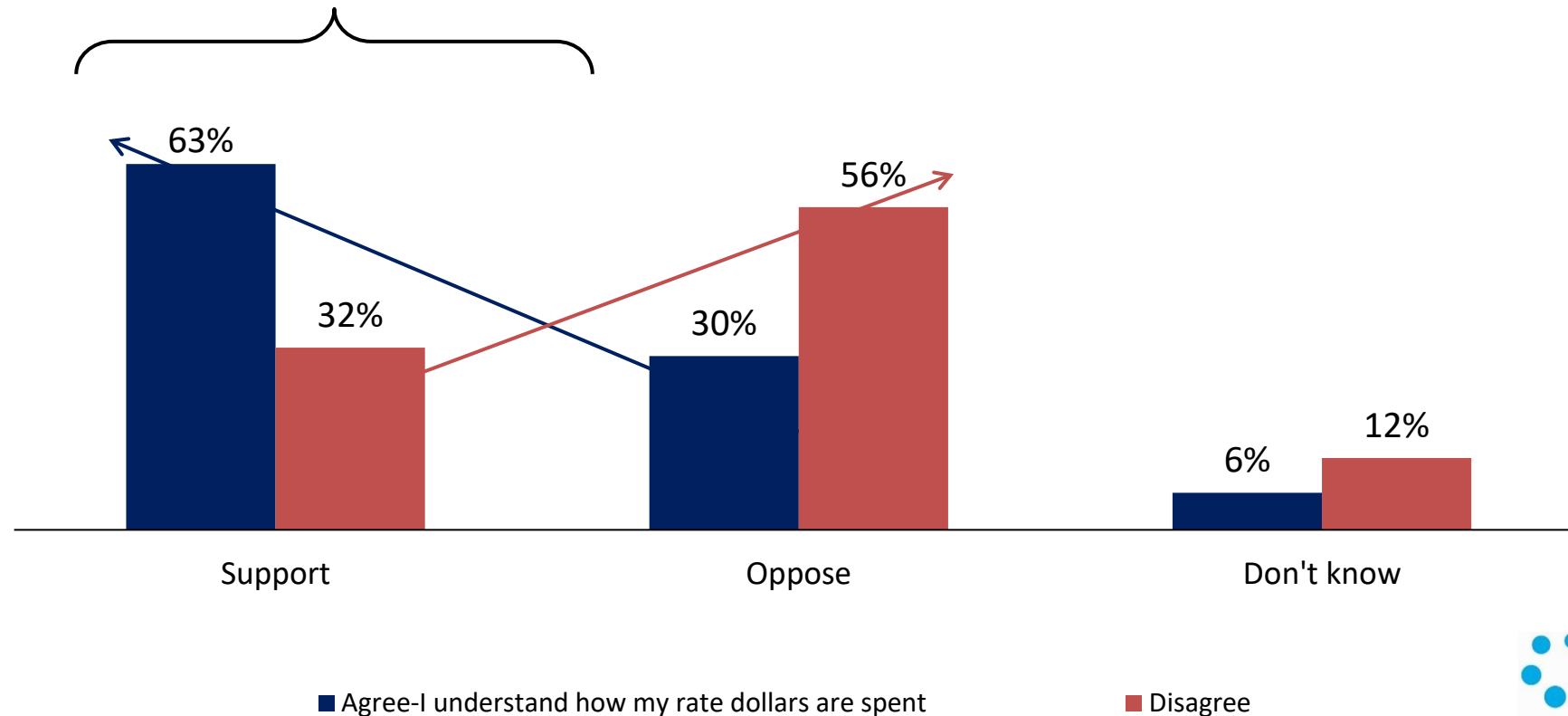
[asked of all respondents; n=2,000]

Support

Agree – I understand how my electricity utility is spending my rate dollars: 63%

Disagree – I understand how my electricity utility is spending my rate dollars: 32%

Impact: +32

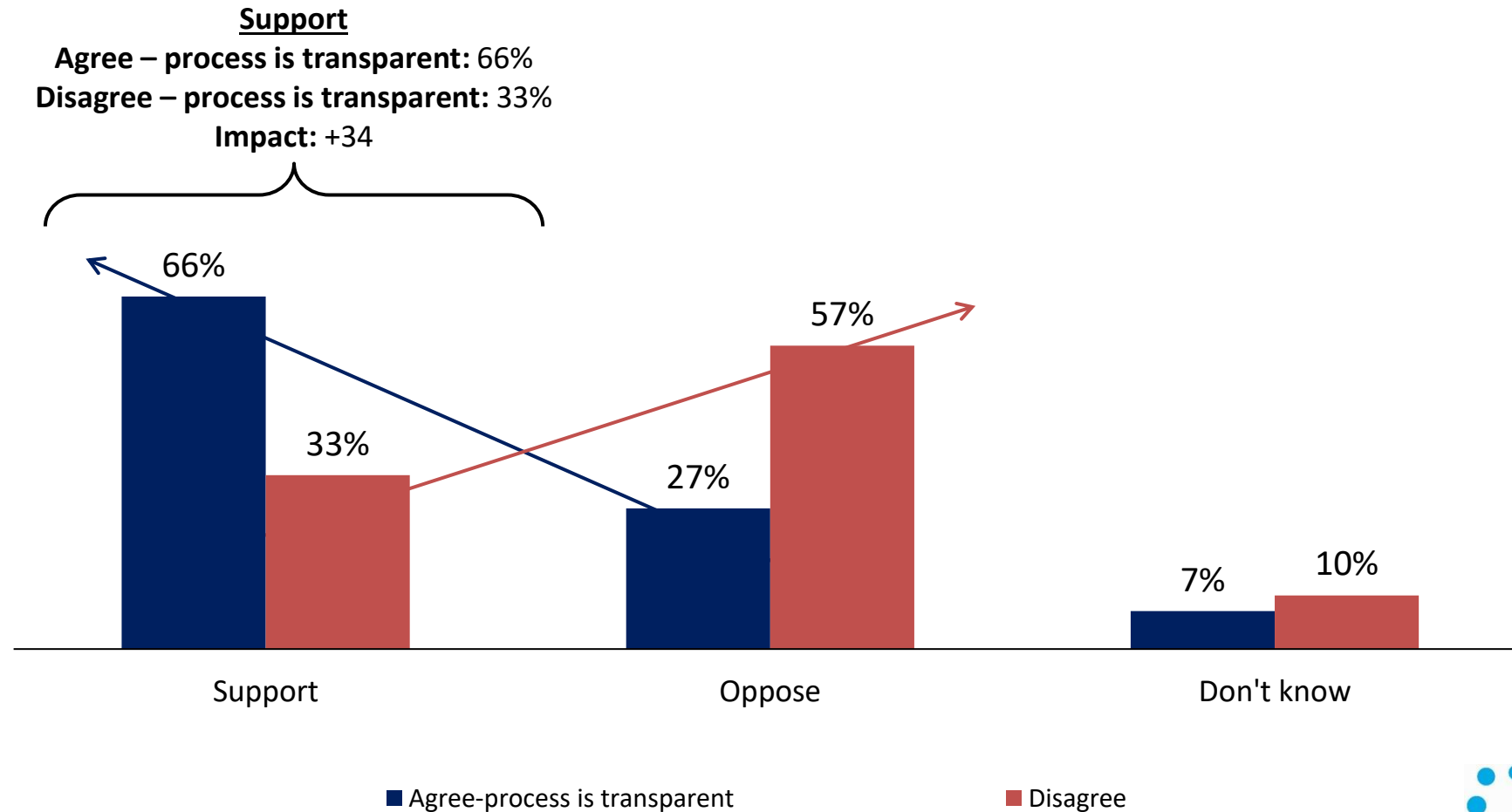


Willingness to Pay BY Process is transparent: Two thirds (66%) of those who say the process is transparent would pay more



Willingness to Pay **BY** Process is transparent

[asked of all respondents; n=2,000]



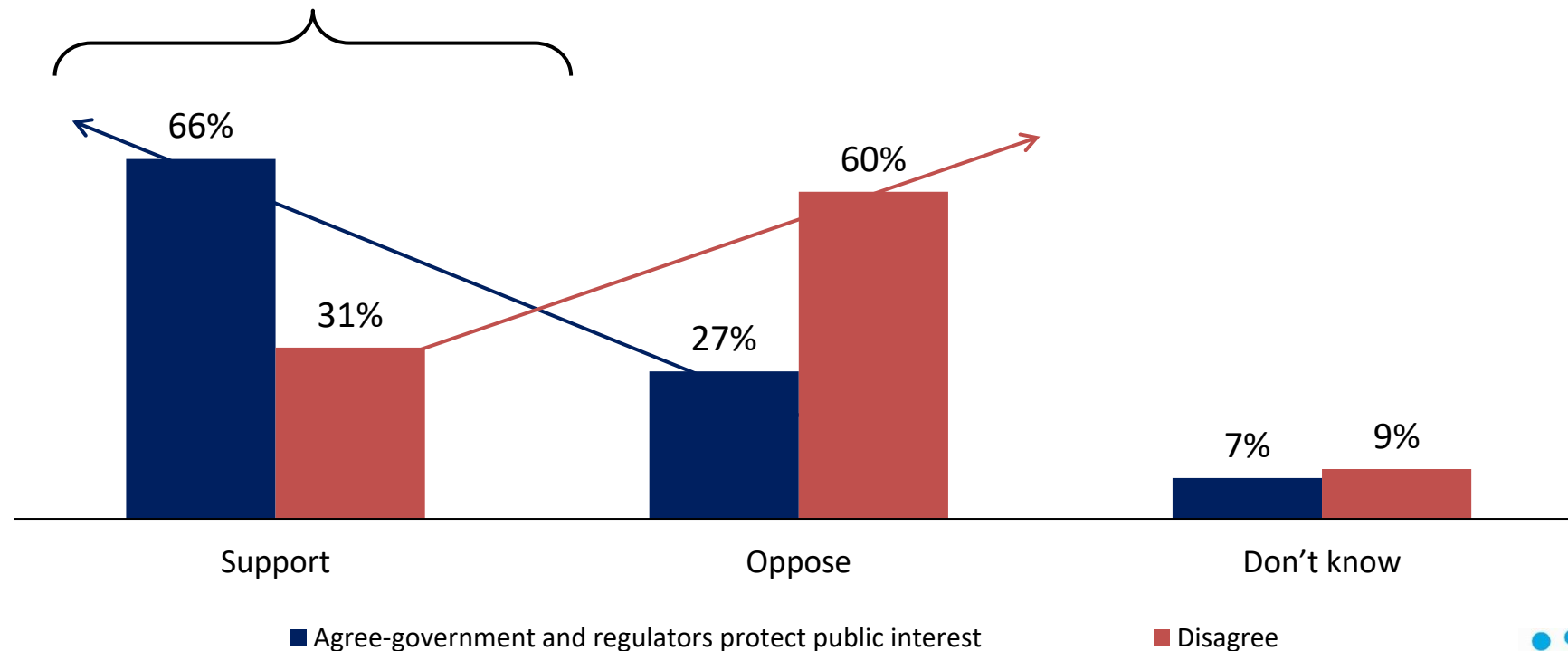
Willingness to Pay BY Protecting Public Interest: Two thirds (66%) of those who say regulators protect public interest would pay more



Willingness to Pay **BY** Protecting Public Interest

[asked of all respondents; n=2,000]

Support
Agree – government and regulators protect public interest: 66%
Disagree – government and regulators protect public interest: 31%
Impact: +34



Methodology

The background of the slide is a solid dark blue color. It features several faint, light blue circles of varying sizes scattered across the surface, creating a subtle pattern.

Methodology

These are the results of an online survey conducted between April 6th and May 1st, 2023.

Method: This online survey was conducted using INNOVATIVE's Canada 20/20 national research panel with additional respondents from Lucid, a leading provider of online sample. Each survey is administered to a series of randomly selected samples from the panel and weighted to ensure that the overall sample's composition reflects that of the actual Canadian population according to Census data to provide results that are intended to approximate a probability sample.

Sample Size: n=3,680 general population, 18 years or older. The results are weighted to n=2,000 based on Census data from Statistics Canada.

Field Dates: April 6th to May 1st, 2023

Weighting: Results for Canada are weighted by age, gender, education and region to ensure that the overall sample's composition reflects that of the actual population according to Census data; in order to provide results that are intended to approximate a probability sample. Weighted and unweighted frequencies are reported in the table.

Margin of Error: This is a representative sample. However, since the online survey was not a random probability based sample, a margin of error cannot be calculated. Statements about margins of sampling error or population estimates do not apply to most online panels.

Note: Graphs may not always total 100% due to rounding values rather than any error in data. Sums are added before rounding numbers.

	Unweighted (n)	Unweighted (%)	Weighted (n)	Weighted (%)
Men 18-34	304	8.3%	277	14.0%
Men 35-54	456	12.5%	316	16.0%
Men 55+	938	25.7%	375	18.9%
Women 18-34	483	13.2%	268	13.6%
Women 35-54	583	16.0%	328	16.6%
Women 55+	888	24.3%	415	21.0%
Region				
BC	583	15.8%	277	13.9%
Alberta	507	13.8%	221	11.1%
Prairies	259	7.0%	128	6.4%
Ontario	1422	38.6%	775	38.7%
Quebec	579	15.7%	464	23.2%
Atlantic	330	9.0%	134	6.7%



For more information, please contact:

Greg Lyle

President

(416) 642-6429

glyle@innovativeresearch.ca

Carmen Hui

Research Analyst

(604) 782-0502

chui@innovativeresearch.ca

Contributing author:

Joshua Tafel, Consultant

Building Understanding.