



Energy Transition

Public Opinion Research

Release Date: February 15th, 2024

Field Dates: January 4th to 16th, 2024

Key Findings

Key Findings

1

People are paying less attention to energy transition and electrification

The number of Canadians who say they can explain electrification and energy transition has dropped over the past year as other concerns compete for attention. Similarly, there is a slight decline in Canadians who say they have personally engaged in shifting energy sources.

2

Feelings about energy transition remain stable

While Canadians are almost 4 times as likely to feel that the energy transition is a good thing (41%) than a bad thing (11%), opinions are split on its financial impact. Canadians are equally likely to say it'll leave them worse off financially (27%) as better (27%) while another 28% feel it will have both positive and negative impacts.

3

Willingness to pay more to enable the transition has dropped in the second half of 2023

Net support for increasing the price of electricity to expand the grid with non-emitting generation has dropped by at least 12 pts. The higher the potential increase, the more support has dropped.

4

Political narratives having more impact than financial circumstances

Willingness to pay has dropped by similar amount BOTH among people struggling to pay their bills and those who are not struggling. Agreement with skeptical narratives is growing while agreement with leadership narratives are dropping.

5

Positive impressions of the Clean Energy Regulations have dropped 18 pts since June 2023

Canadians want to take action to reduce emissions from electricity, but they would prefer to extend the deadline beyond 2035 to keep price increases down. A growing number of Canadians support the CPC narrative over the Liberal narrative.

Energy Transition

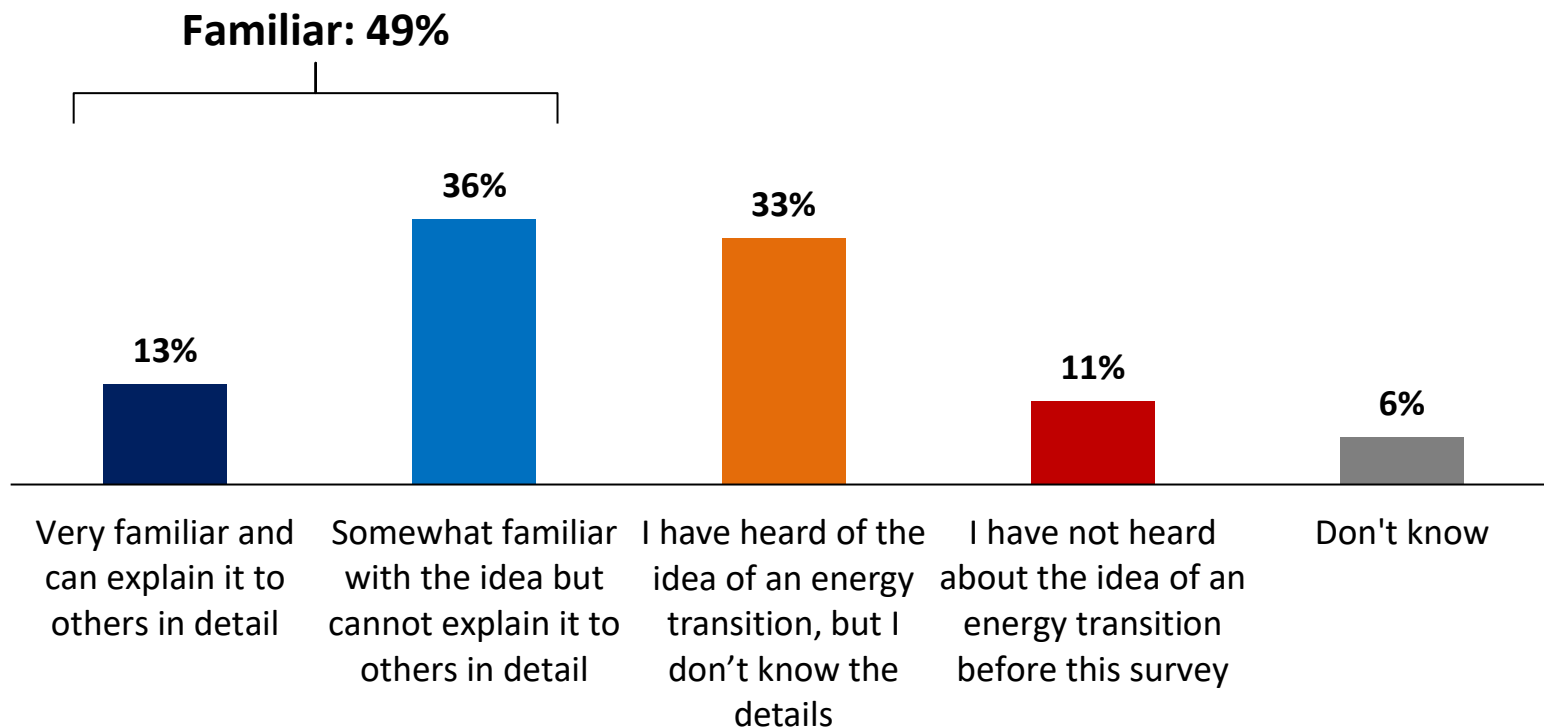
Familiarity with Energy Transition: Nearly half (49%) are familiar with the idea of energy transition; highest among Populist Conservatives



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.

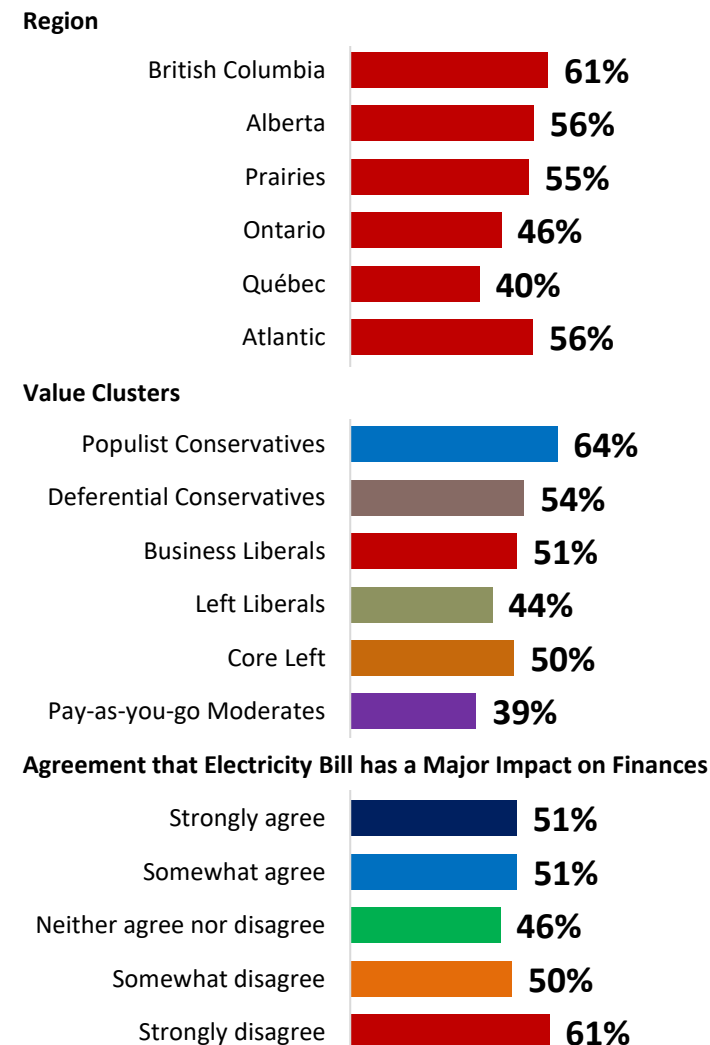
How familiar are you with the idea of transitioning from its current energy system that depends highly on carbon-based fuels to a lower-carbon energy system?

[asked of all respondents; n=1,500]



Segmentation

Those who are Familiar



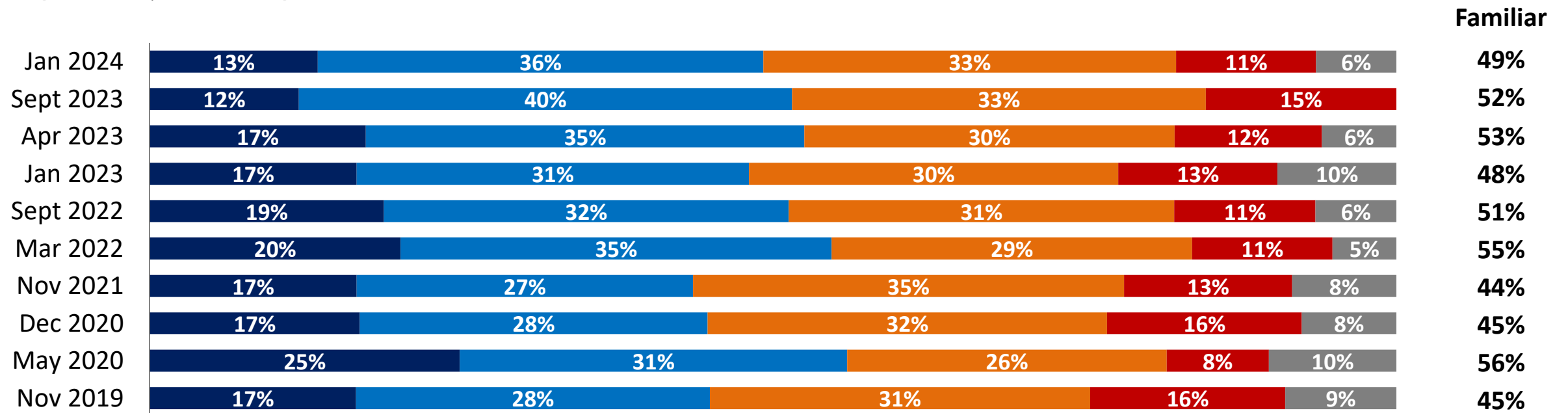
Familiarity with Energy Transition – Tracking: Familiarity with energy transition has remained stable since tracking began in Nov '19



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=1,500]



Very familiar and can explain it to others in detail

I have heard of the idea of an energy transition, but I don't know the details

Don't know

Somewhat familiar with the idea but cannot explain it to others in detail

I have not heard about the idea of an energy transition before this survey

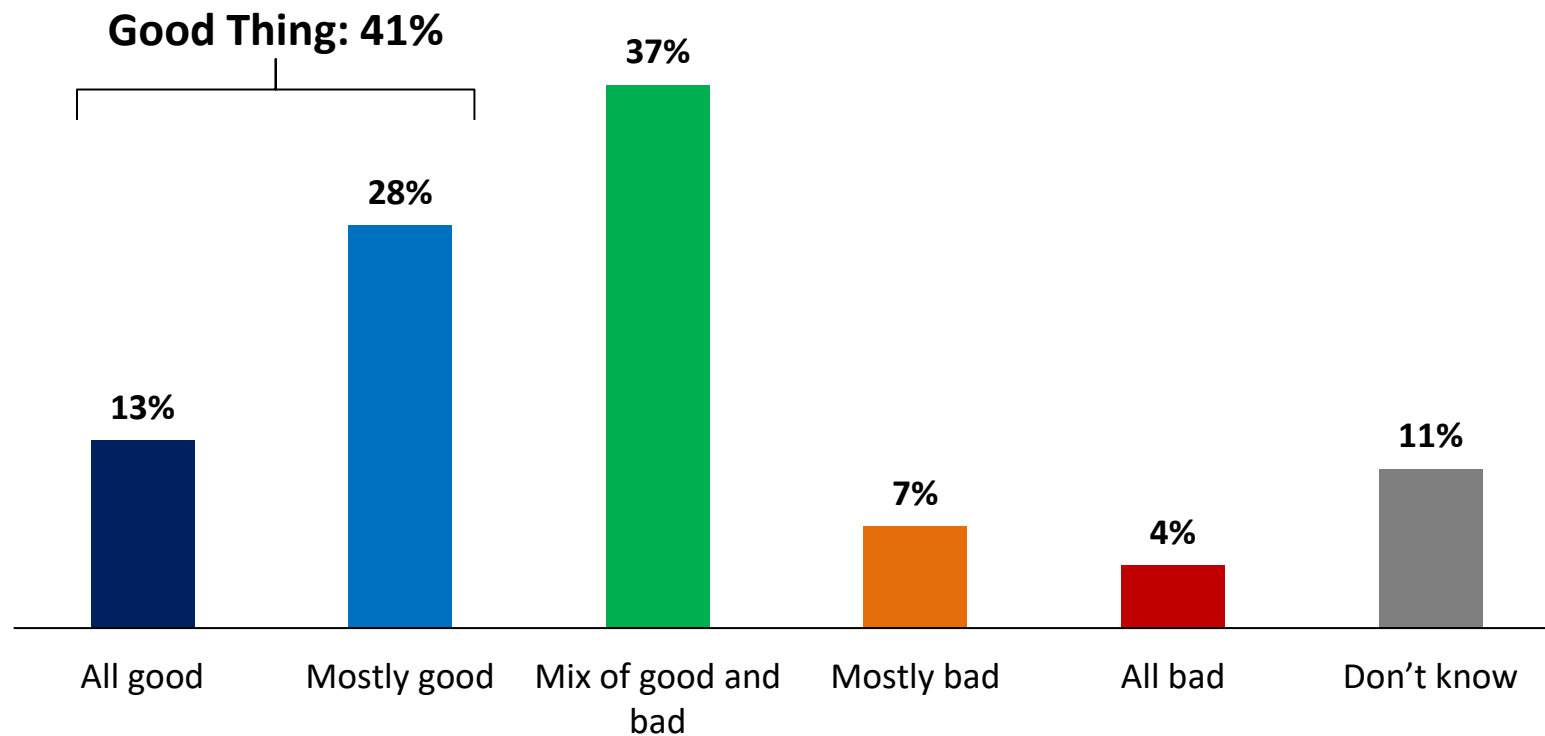
NOTE: "Don't know" was not included as an option when asked in September 2023. In addition, wording for two response options are slightly different from November 2019 to April 2023 i.e. "Very familiar and can explain it to others in detail" was "I understand the details and can explain them to others" while "Somewhat familiar with the idea but cannot explain it others" was "I am familiar with the idea of an energy transition but cannot explain it to others".

Impression of Energy Transition: Based on first impressions, 2-in-5 (41%) say energy transition sounds like a good thing



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

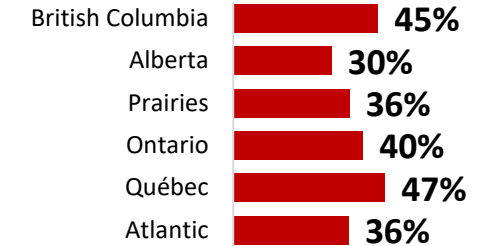
[asked of all respondents; n=1,500]



Segmentation

Those who say Good Thing

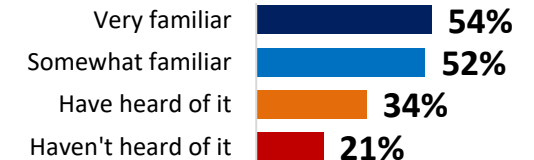
Region



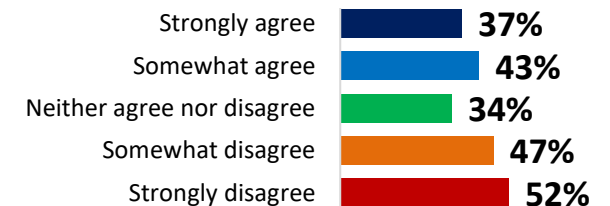
Value Clusters



Familiarity with Idea of Energy Transition



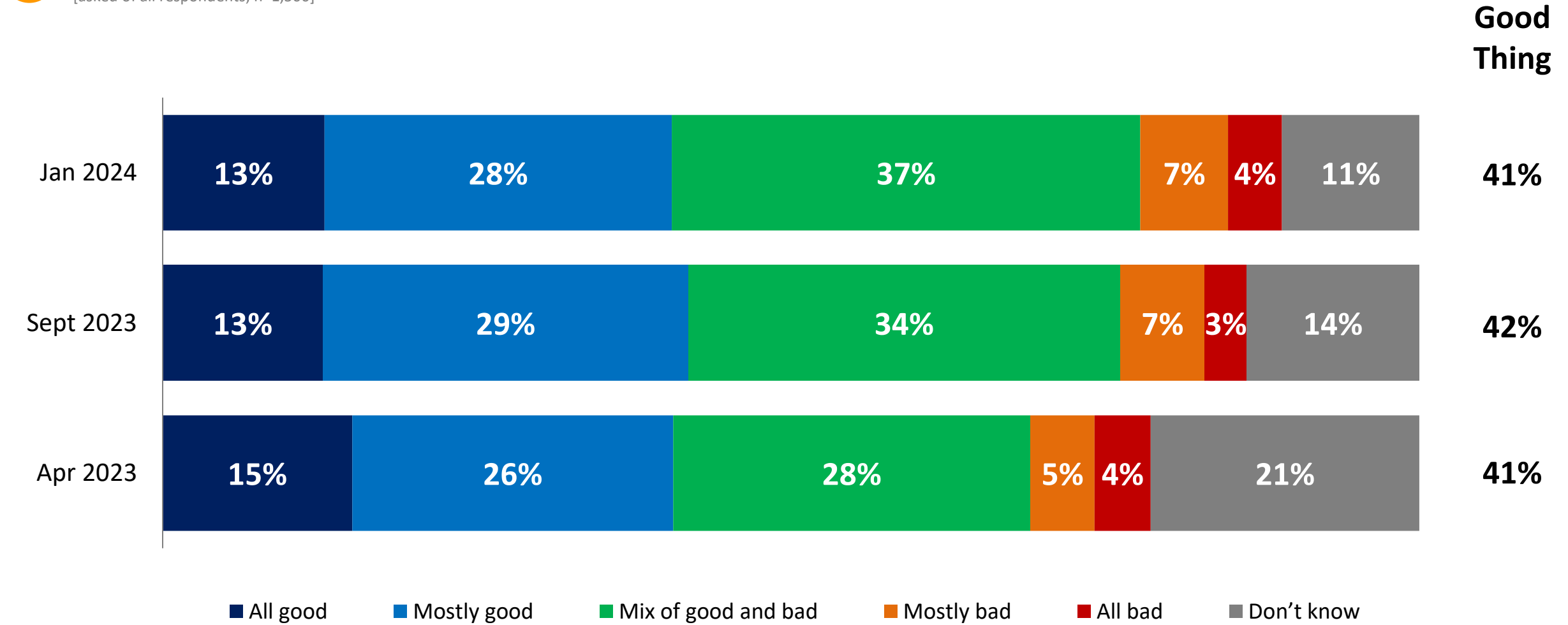
Agreement that Electricity Bill has a Major Impact on Finances



Impression of Energy Transition – Tracking: Over time, respondents have been increasingly likely to characterize it as a mix of good and bad



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=1,500]

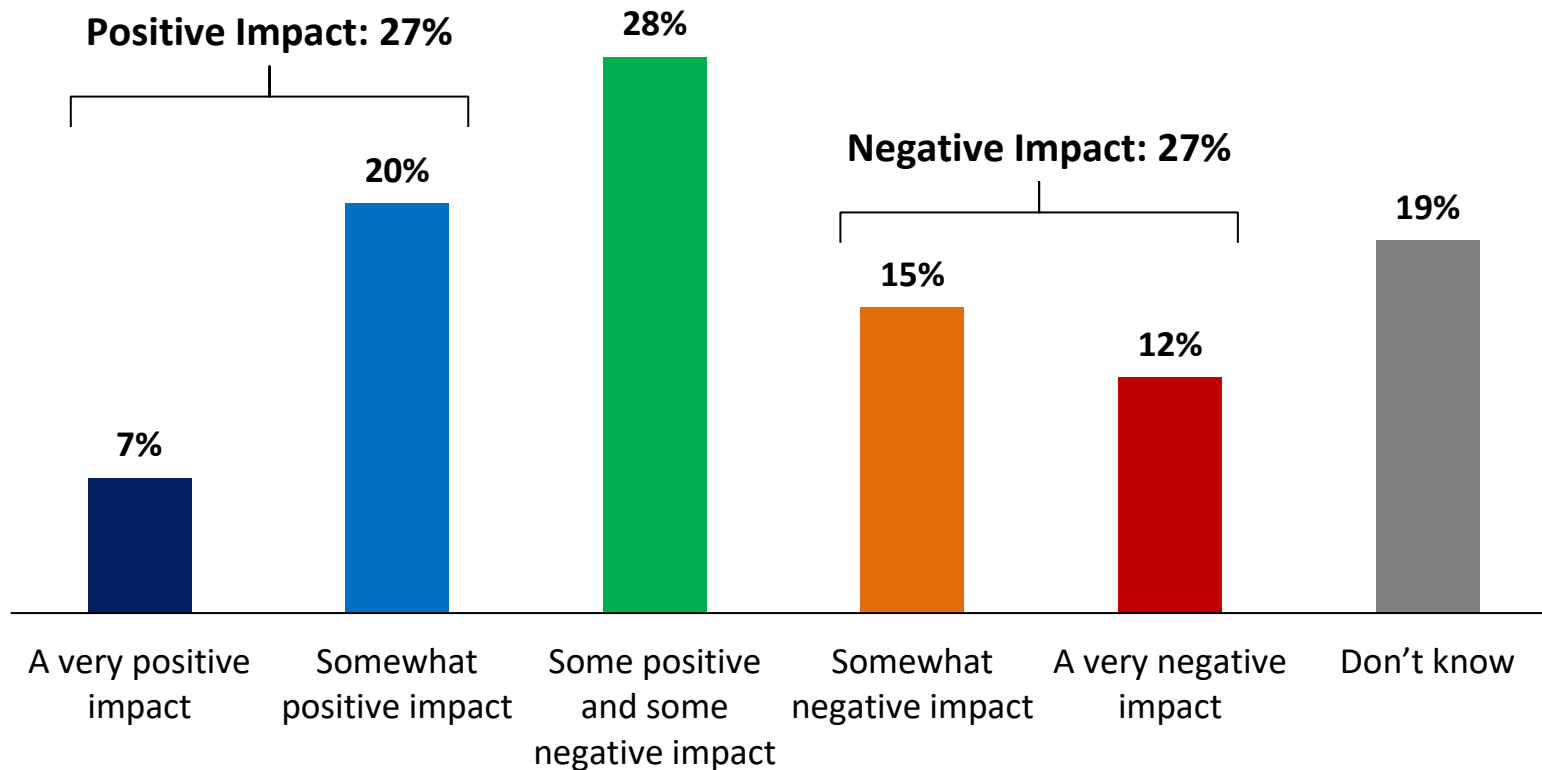


Energy Transition Financial Impact: When it comes to financial impacts,⁹ respondents are split



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?

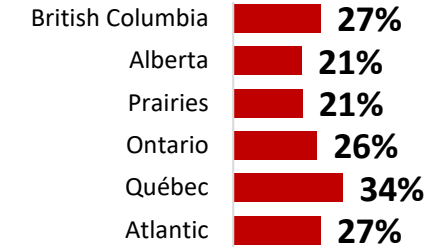
[asked of all respondents; n=1,500]



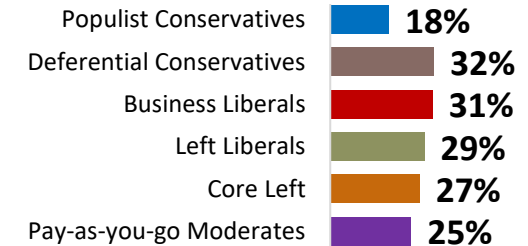
Segmentation

Those who say Positive Impact

Region



Value Clusters



Familiarity with Idea of Energy Transition



Agreement that Electricity Bill has a Major Impact on Finances

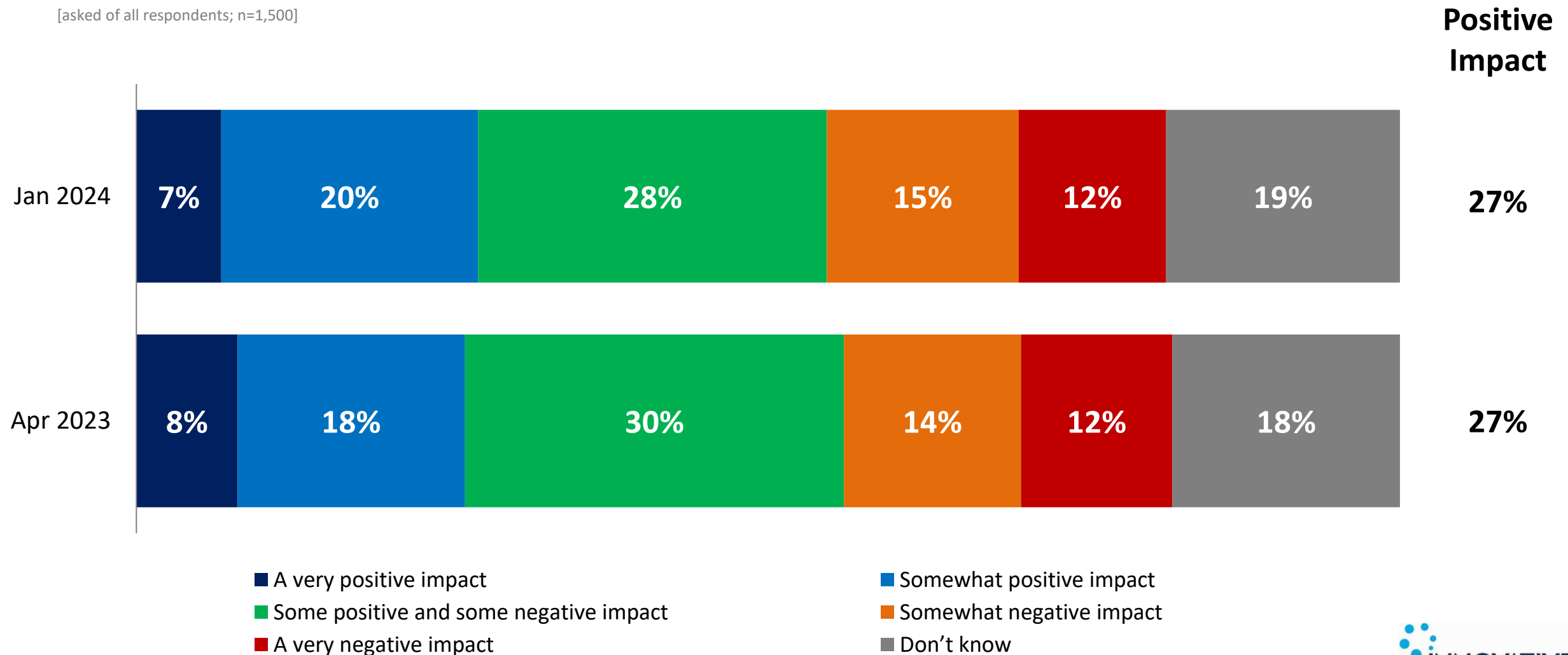


Energy Transition Impact – Tracking: Perspectives on the impact of energy transition on household finances have remained unchanged



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=1,500]

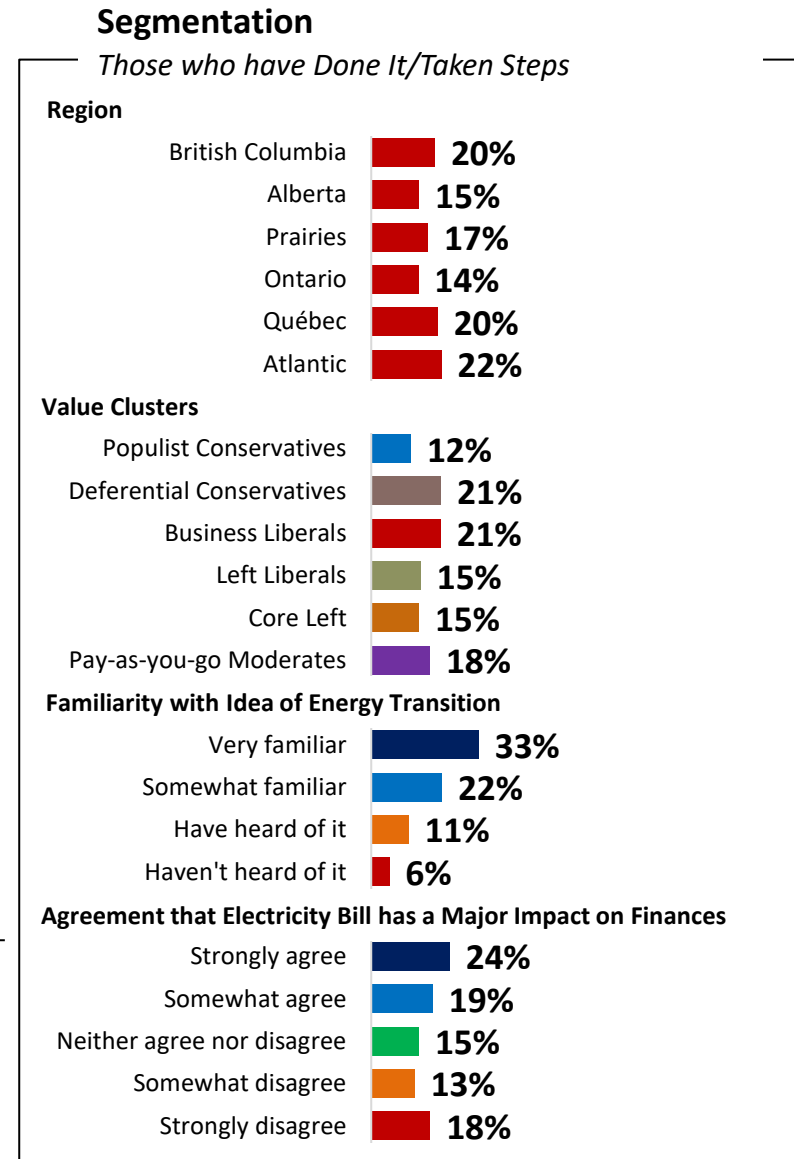
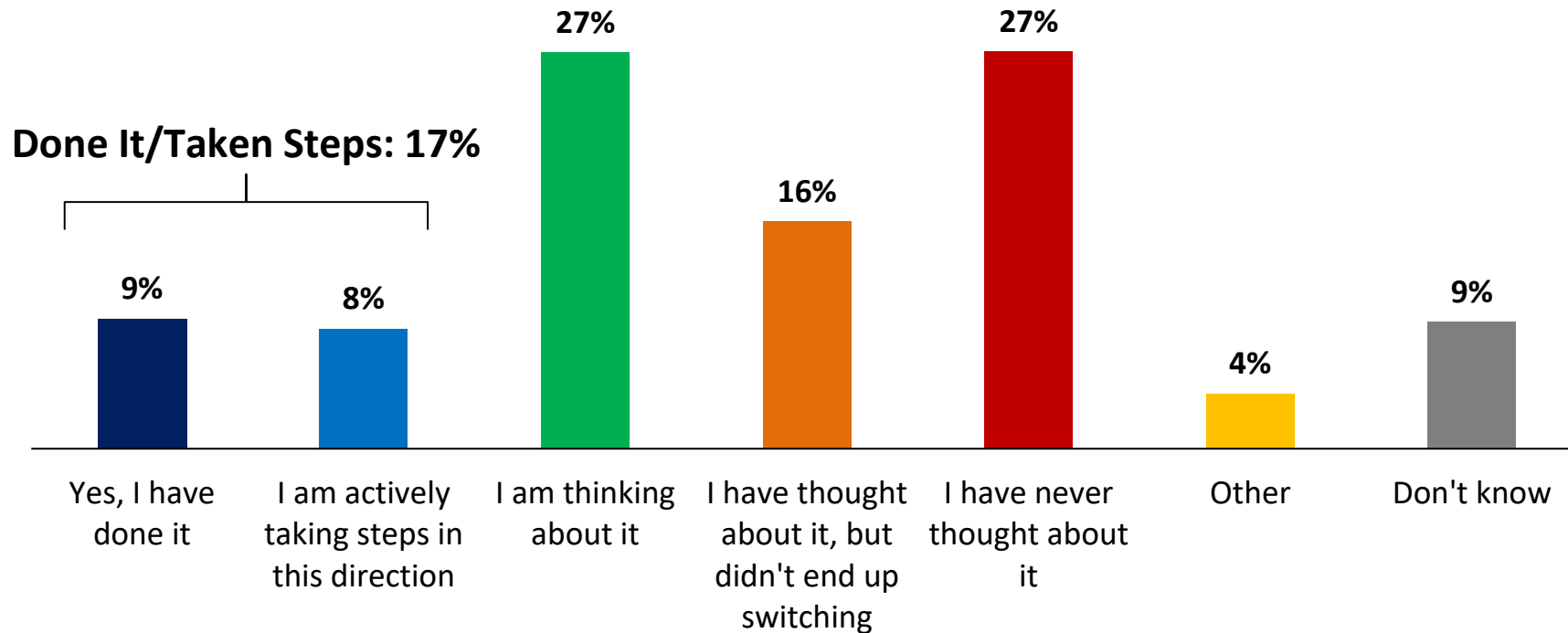


Energy Shift: Less than 1-in-5 (17%) have taken steps to shift energy sources; highest among those familiar with energy transition



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=1,500]

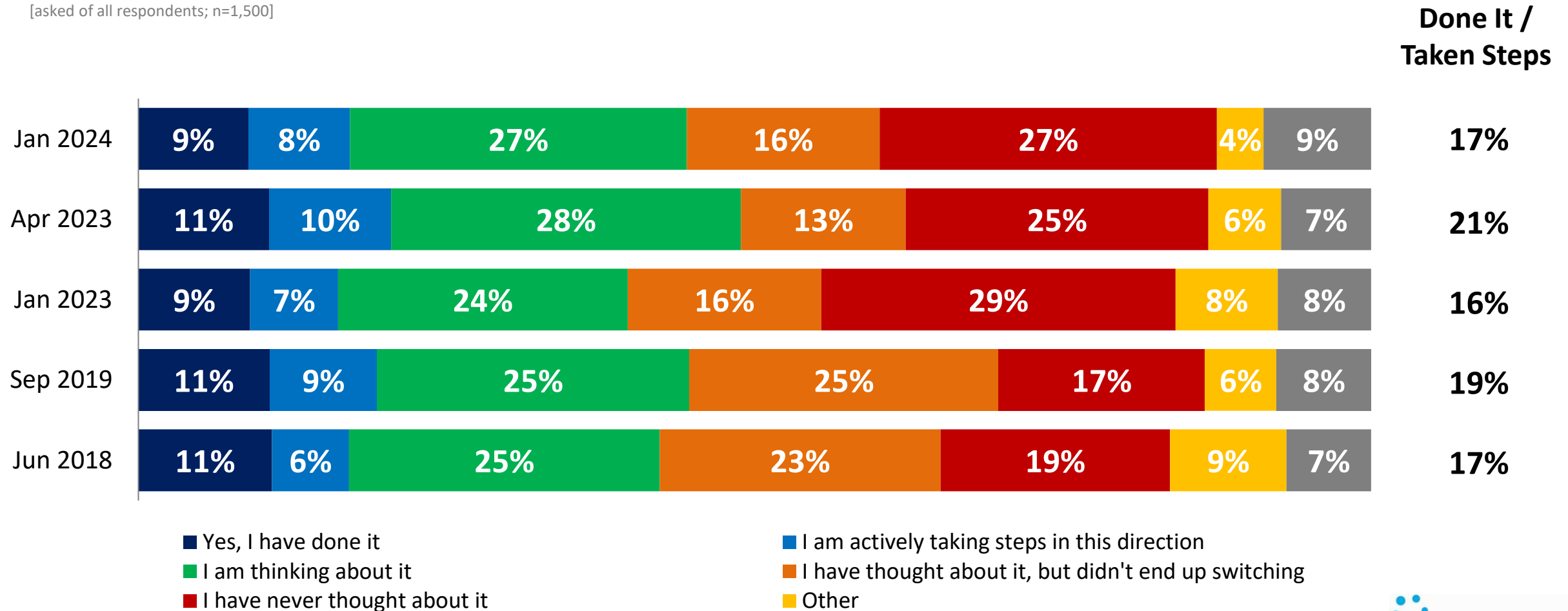


Energy Shift – Tracking: Consumers are no more focused on their broader energy wallet today than five years ago



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=1,500]



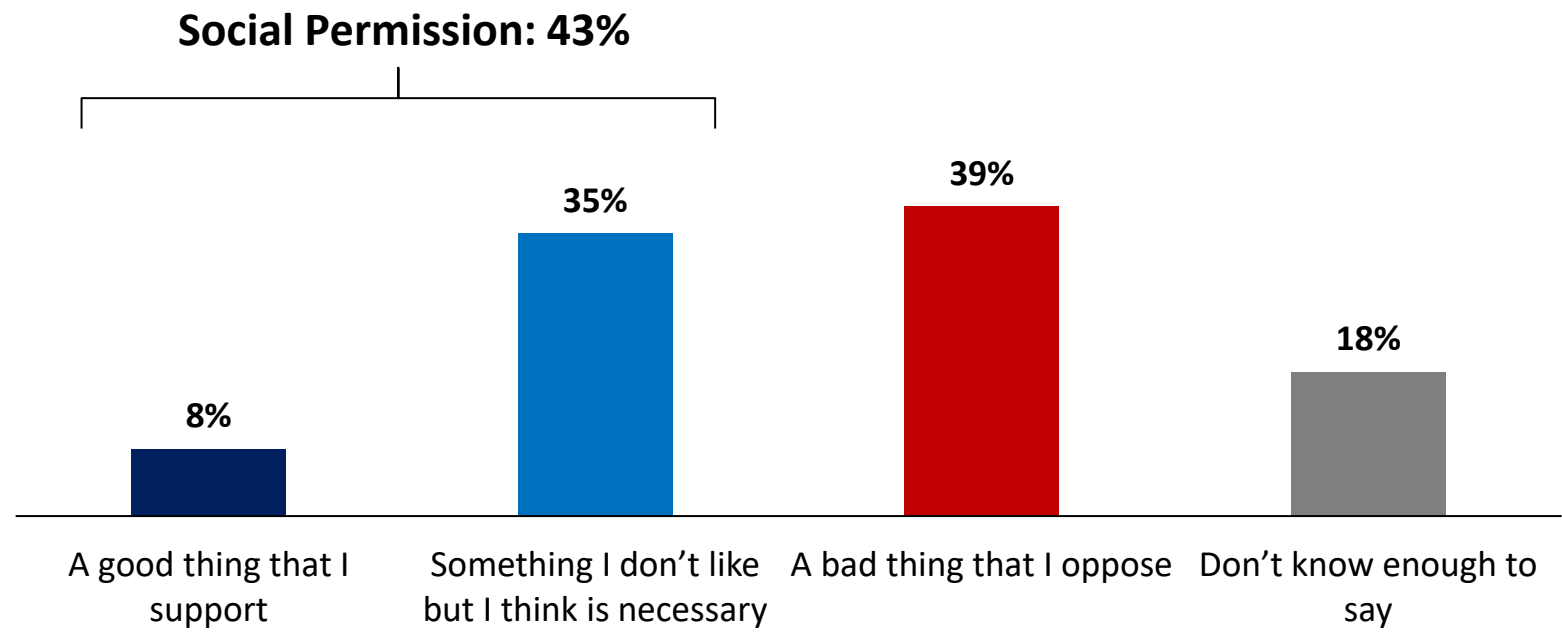
Social Permission: 43% think increasing the price of electricity is at least necessary; highest social permission among Deferential Conservatives



Research from multiple sources predicts the energy transition could require the electricity system to more than double to meet the growing demand for electricity. This would require new investments in [INSERT PROV]'s electricity system.

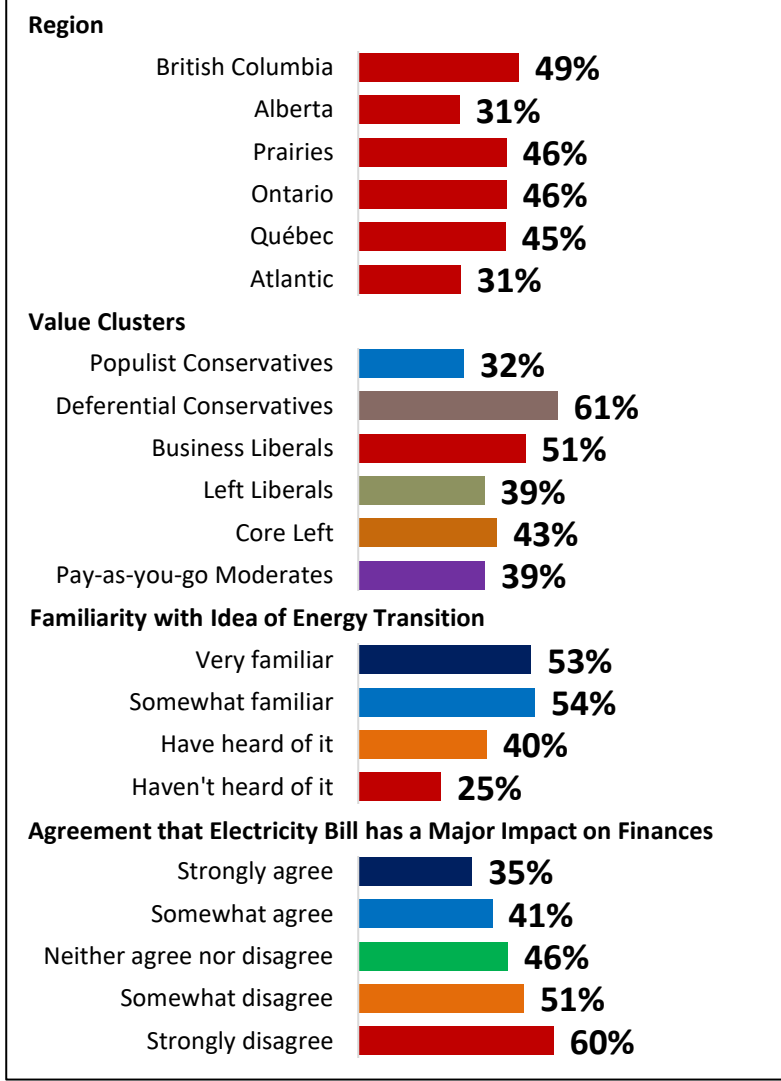
Do you think that increasing the price of electricity to be able to expand [INSERT PROV]'s electricity system would be...

[asked of all respondents; n=1,500]



Segmentation

Those who give Social Permission



Social Permission Tracking: Support and opposition for price increases to facilitate energy transition has remained steady since Sept '23

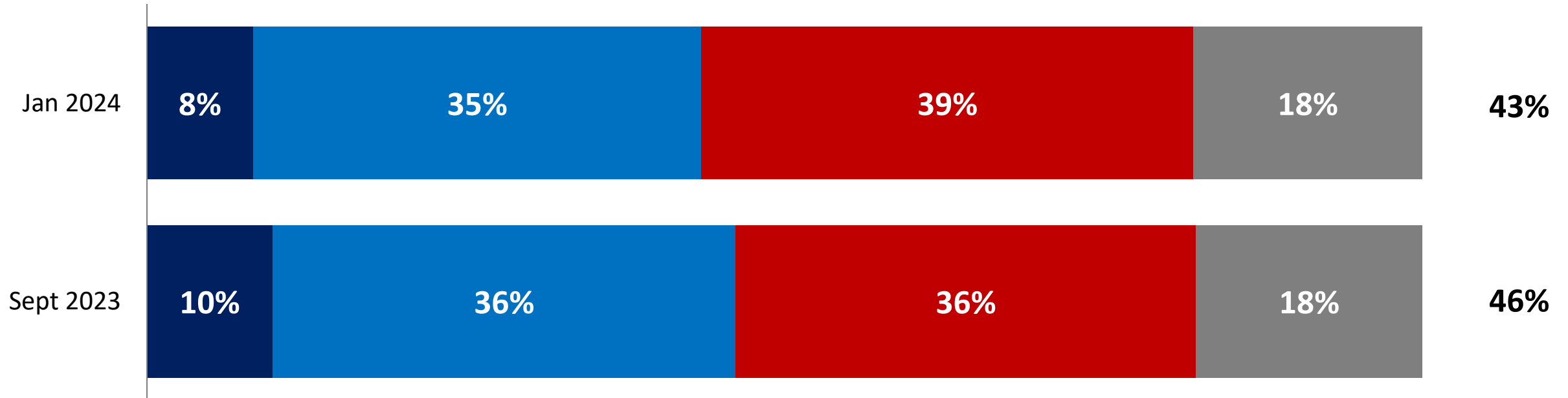


Research from multiple sources predicts the energy transition could require the electricity system to more than double to meet the growing demand for electricity. This would require new investments in [INSERT PROV]'s electricity system.

Do you think that increasing the price of electricity to be able to expand [INSERT PROV]'s electricity system would be...

[asked of all respondents; n=1,500]

Support / Necessary



■ A good thing that I support

■ A bad thing that I oppose

■ Something I don't like but I think is necessary

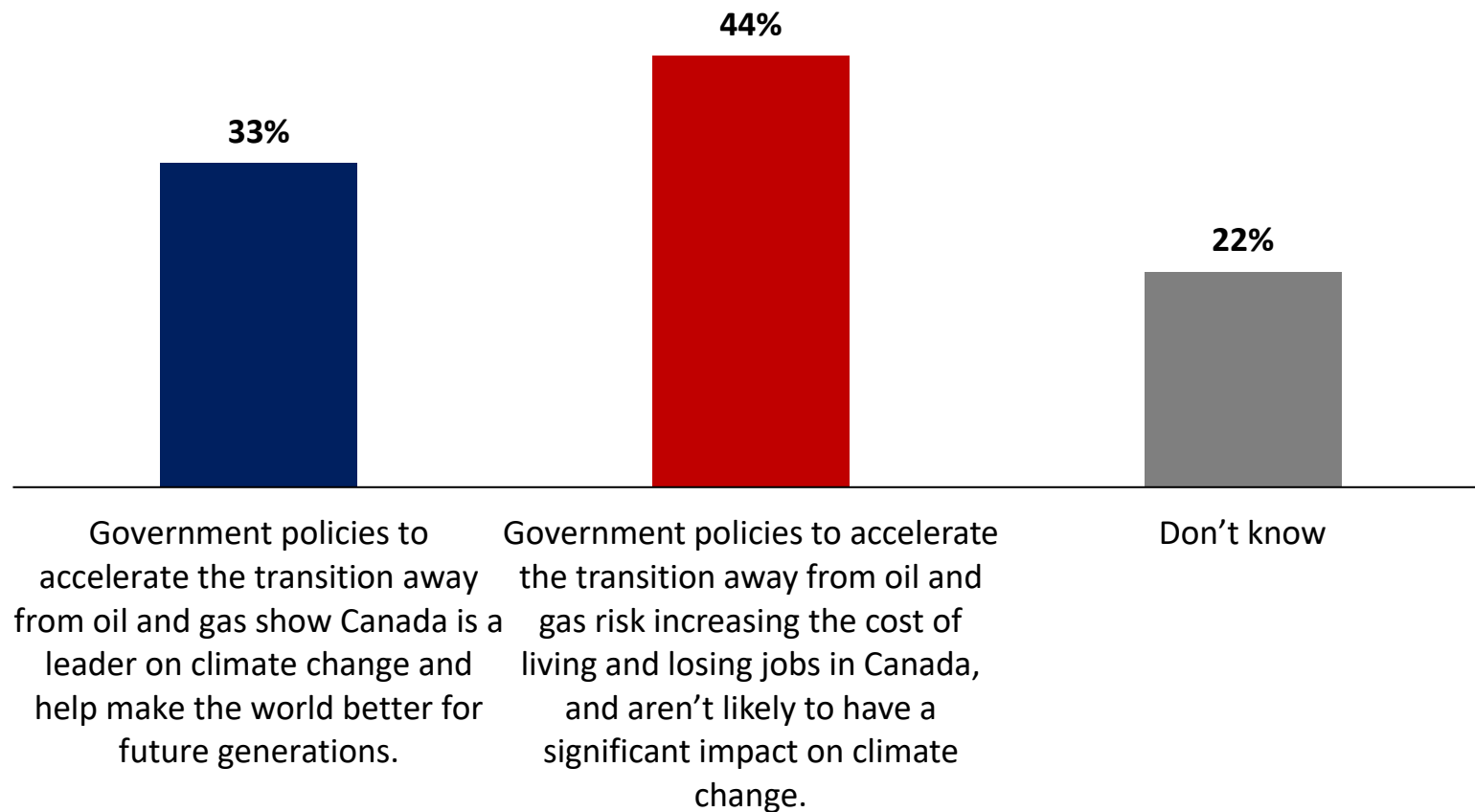
■ Don't know enough to say

Views on Government Energy Transition Policies: The greater the bill impact, the more likely to have a negative view of gov't policies



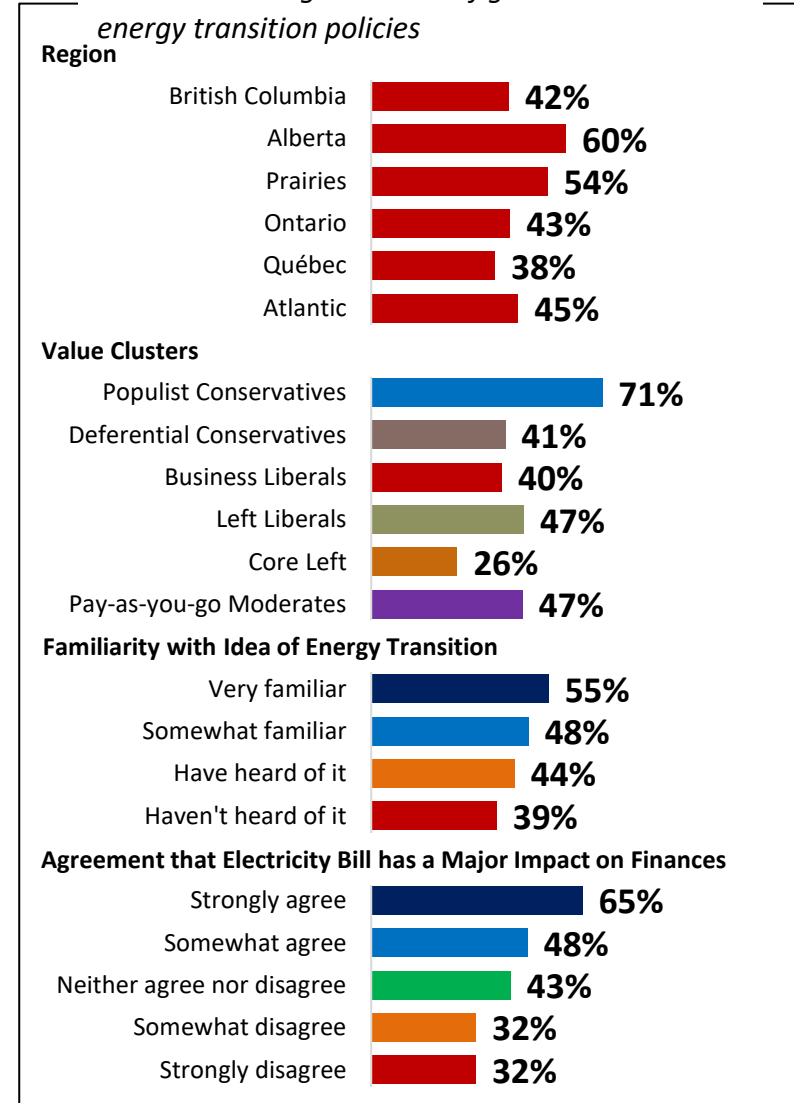
Based on what you know about an energy transition, which of the following statements is closest to your point of view?

[asked of all respondents; n=1,500]



Segmentation

Those with a negative view of government energy transition policies



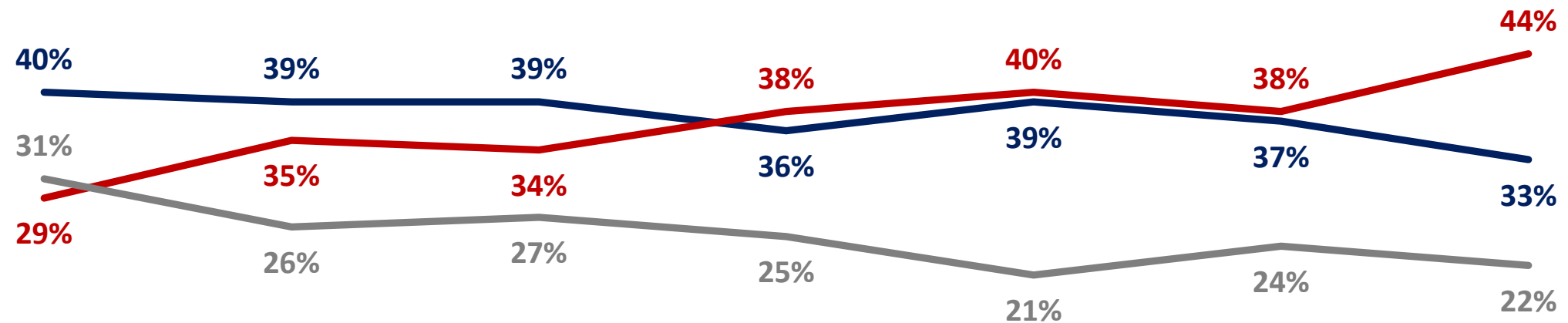
Views on Government Energy Transition Policies – Tracking: Skeptical viewpoint up 6 points since Sept '23; highest since tracking began



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=1,500]

- 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



Nov 2021

Mar 2022

Sept 2022

Jan 2023

Apr 2023

Sep 2023

Jan 2024

Electrification

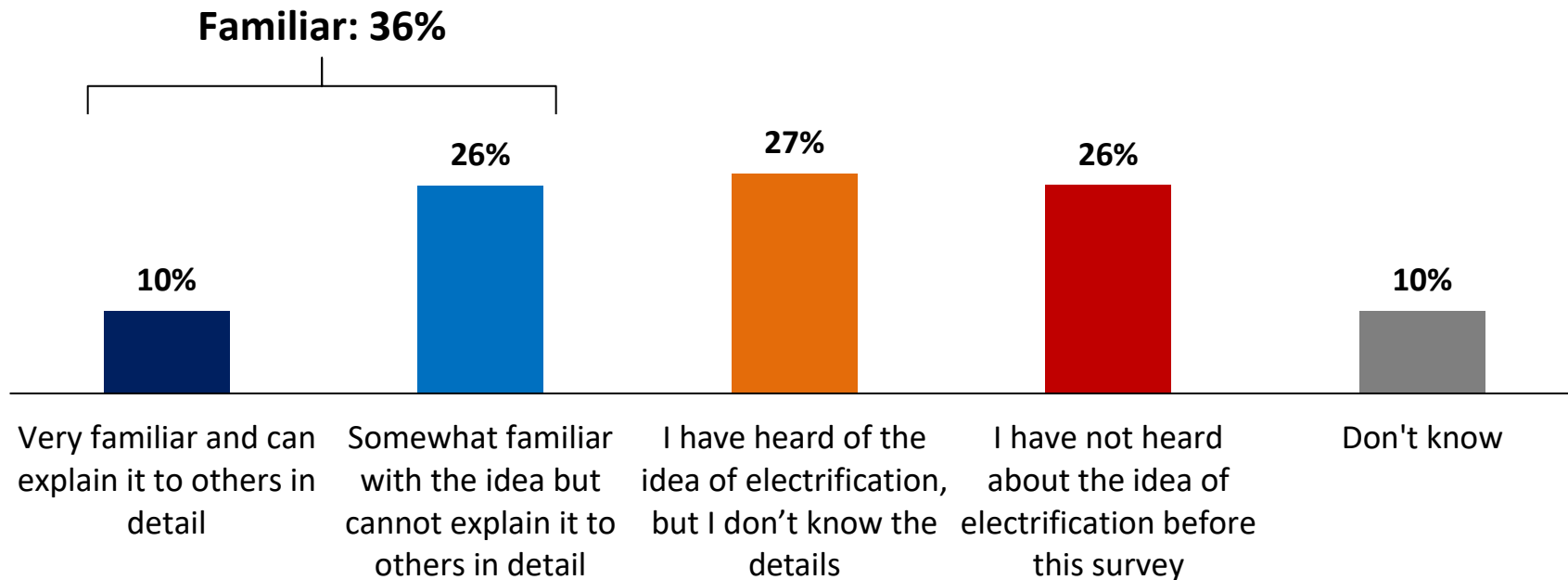
Electrification Familiarity: Nearly 2-in-5 (36%) are familiar with electrification; highest among those very familiar with energy transition



A key element in the energy transition is electrification. Electrification means increasing the use of electricity generated from non-carbon emitting energy sources. Expanding the electricity grid with non-emitting generation will result in increases to your electricity bill above and beyond any normal costs associated with aging equipment, inflation and other routine cost increases.

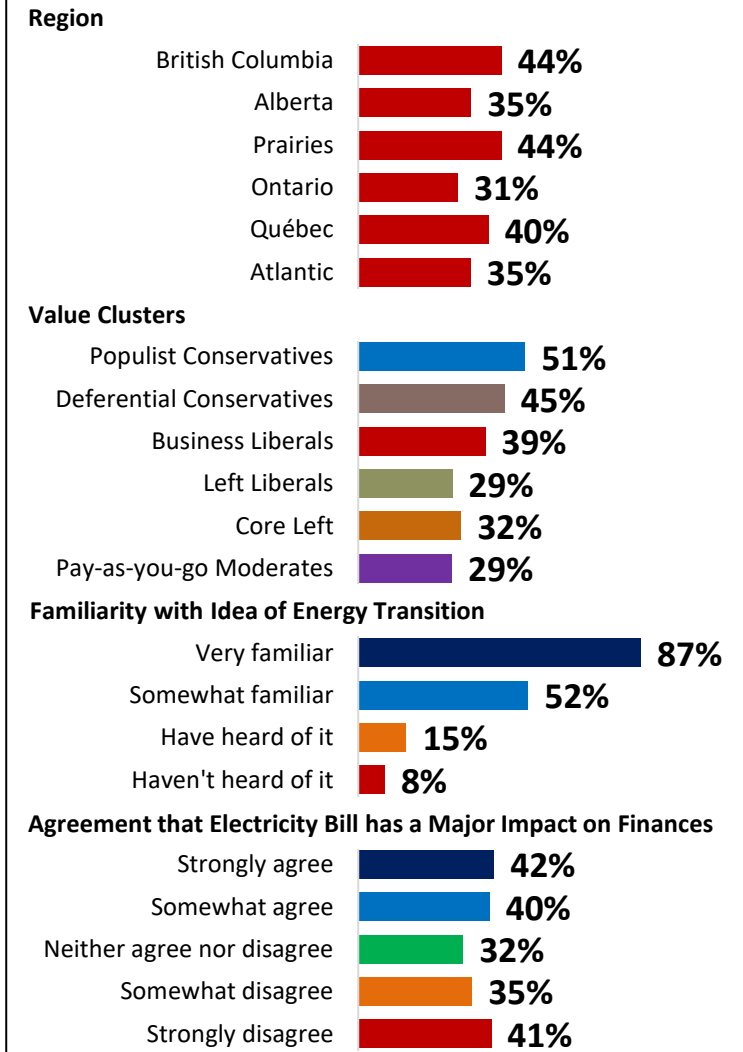
How familiar are you with the idea of electrification, that is increasing the use of electricity generated from non-carbon emitting energy sources as part of transitioning to a lower-carbon energy system?

[asked of all respondents; n=1,500]



Segmentation

Those who are Familiar



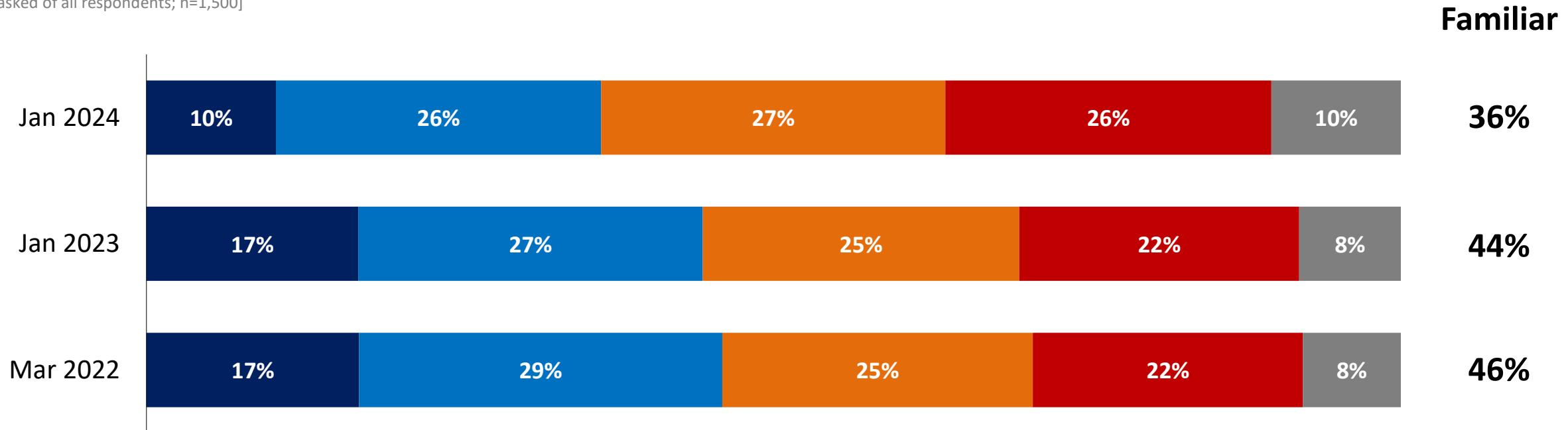
Electrification Familiarity Tracking: The share of those familiar with electrification has slipped to the lowest since tracking began



A key element in the energy transition is electrification. Electrification means increasing the use of electricity generated from non-carbon emitting energy sources. Expanding the electricity grid with non-emitting generation will result in increases to your electricity bill above and beyond any normal costs associated with aging equipment, inflation and other routine cost increases.

How familiar are you with the idea of electrification, that is increasing the use of electricity generated from non-carbon emitting energy sources as part of transitioning to a lower-carbon energy system?

[asked of all respondents; n=1,500]



Very familiar and can explain it to others in detail

I have heard of the idea of electrification, but I don't know the details

Don't know

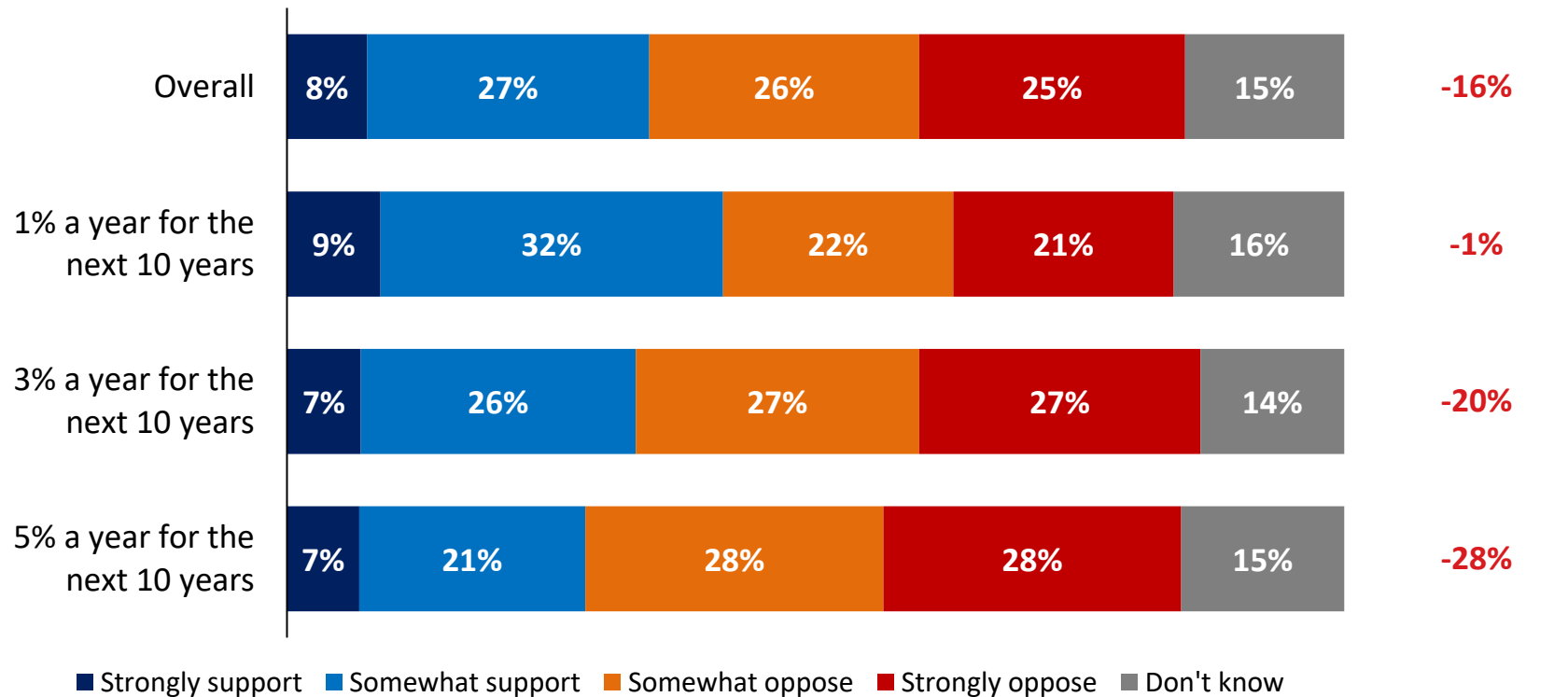
Somewhat familiar with the idea but cannot explain it to others in detail

I have not heard about the idea of electrification before this survey

Electrification Pricing: Net support is negative for all price increase proposals; Populist Conservatives most likely to oppose

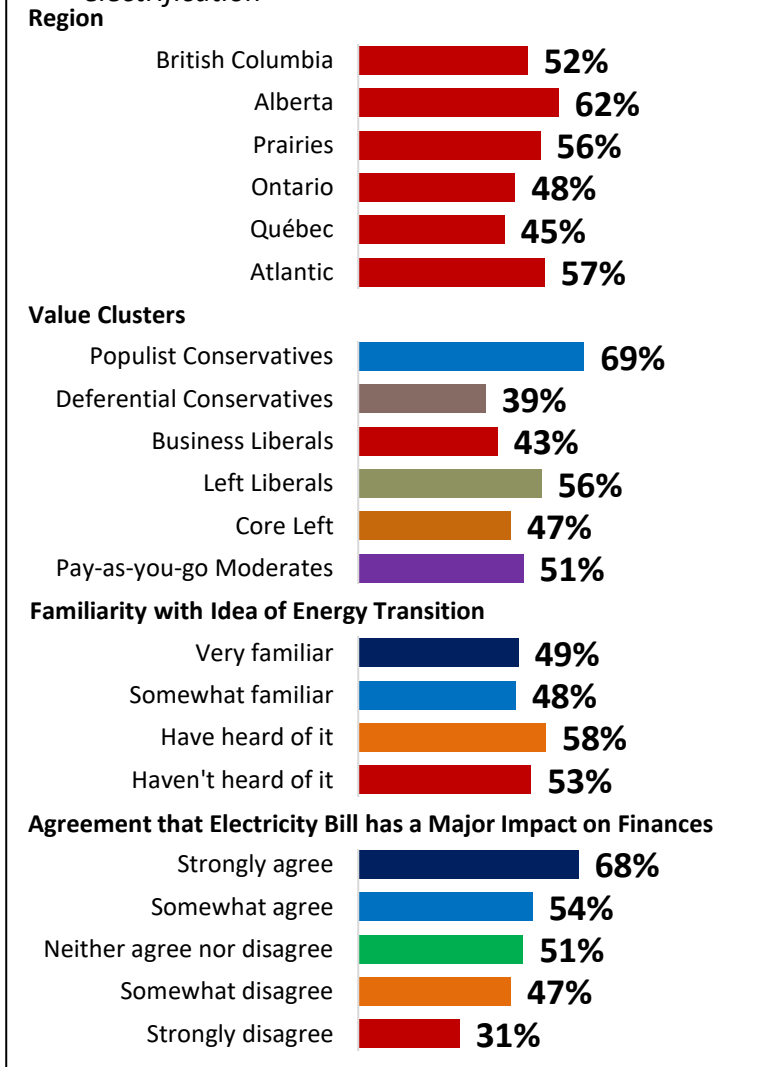
Q Electricity prices will have to rise to pay for expanding the electricity grid with non-emitting generation. You might be able to offset some of these costs by reducing the amount of automotive fuel or home heating fuel you currently purchase. The more we pay in electricity rates, the quicker we can 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=1,500]



Segmentation

Those who oppose investments to enable electrification

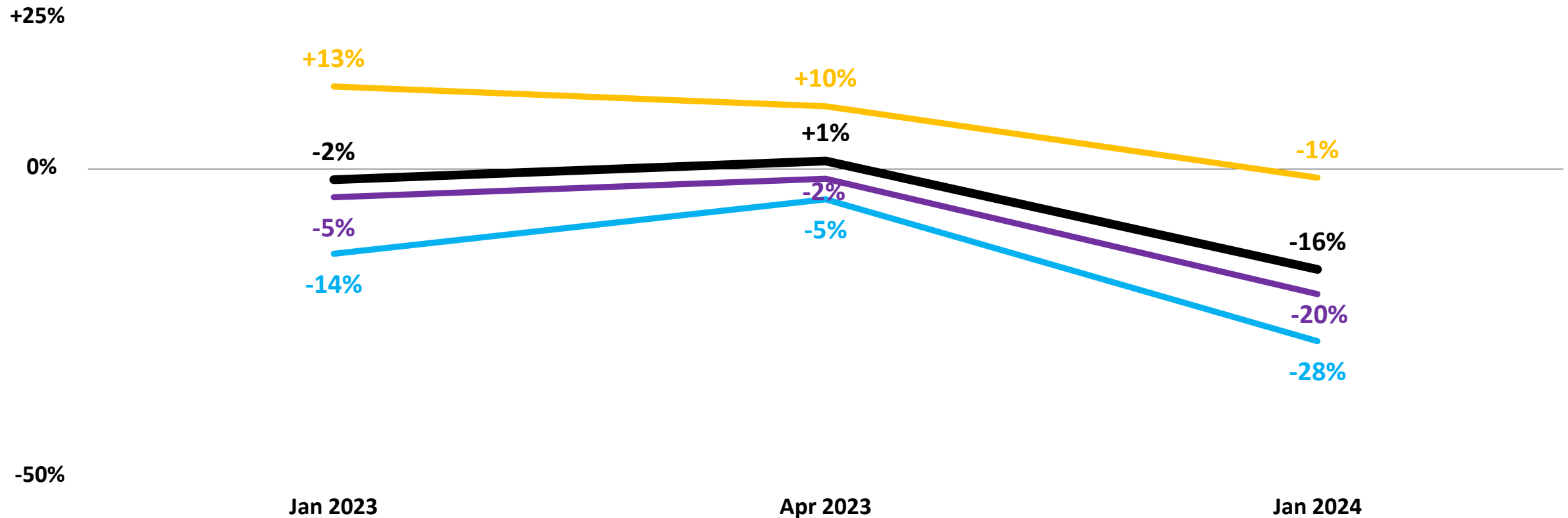


Electrification Pricing – NET Support Tracking: Support for electricity price increases down across all proposed percentage increases

Q 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=1,500]

— 1% a year for the next 10 years
 — 3% a year for the next 10 years
 — 5% a year for the next 10 years
 — Overall

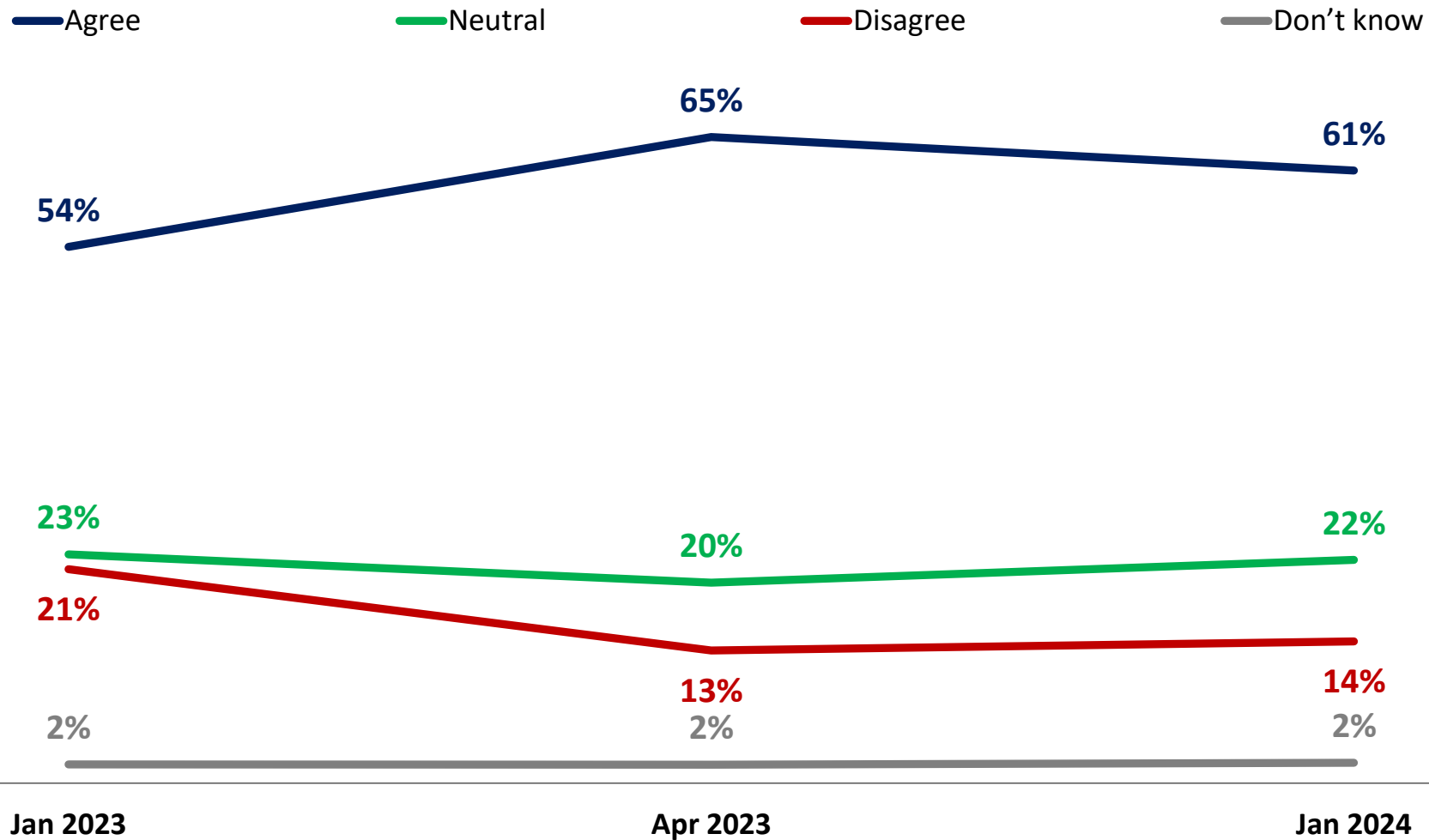


Impact of Affordability on Electrification Support

General Affordability: 3-in-5 (61%) are finding it more difficult to get by,²³ up 8 point from a year ago



Do you agree or disagree with the following statements? No matter how hard I work, every year it seems more difficult to get by.
[asked of all respondents; n=1,500]

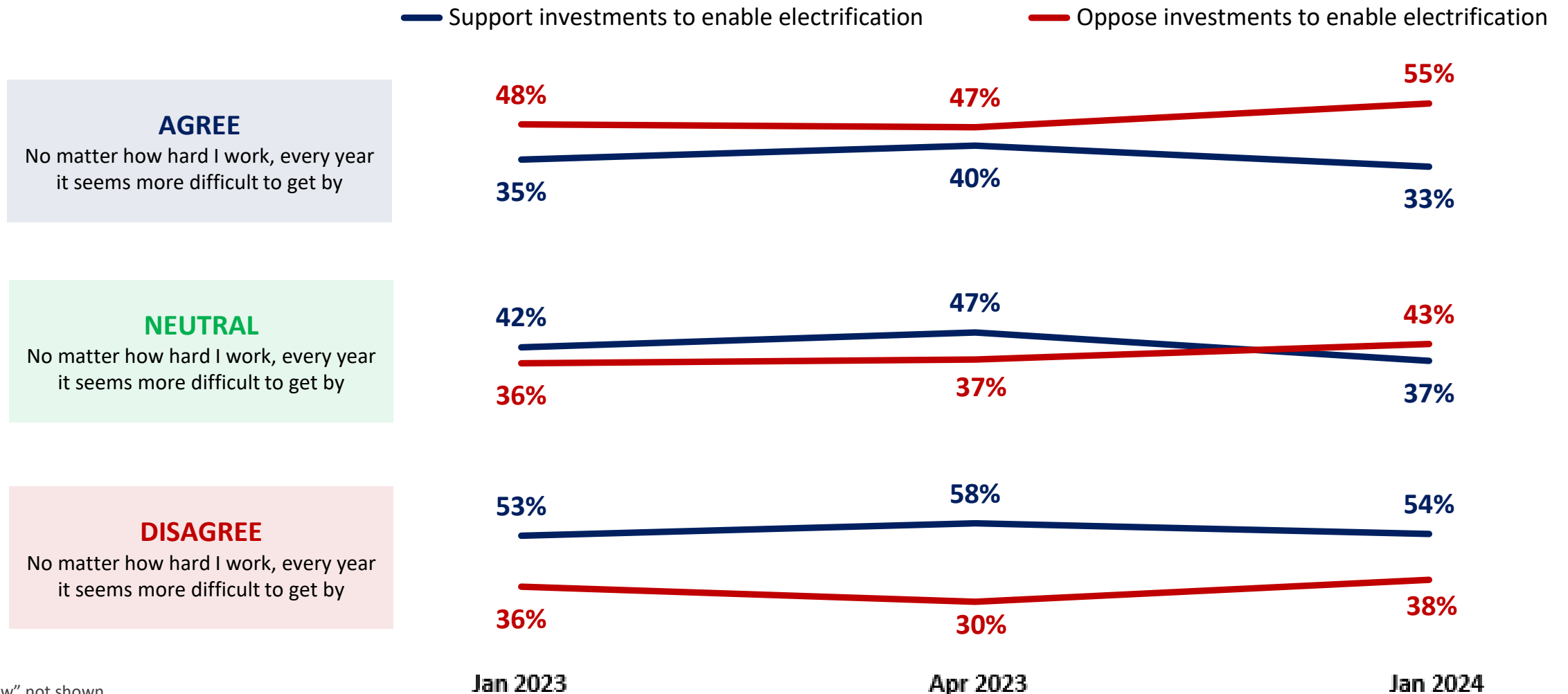


Electrification Investment Support By Economic Situation: Opposition to spending more is up regardless of financial circumstances



Do you support or oppose investments to enable electrification, if in addition to routine increases, your electricity bill will grow by: **OVERALL [BY]** Do you agree or disagree with the following statements? No matter how hard I work, every year it seems more difficult to get by.

[asked of all respondents; n=1,500]



NOTE: "Don't know" not shown.

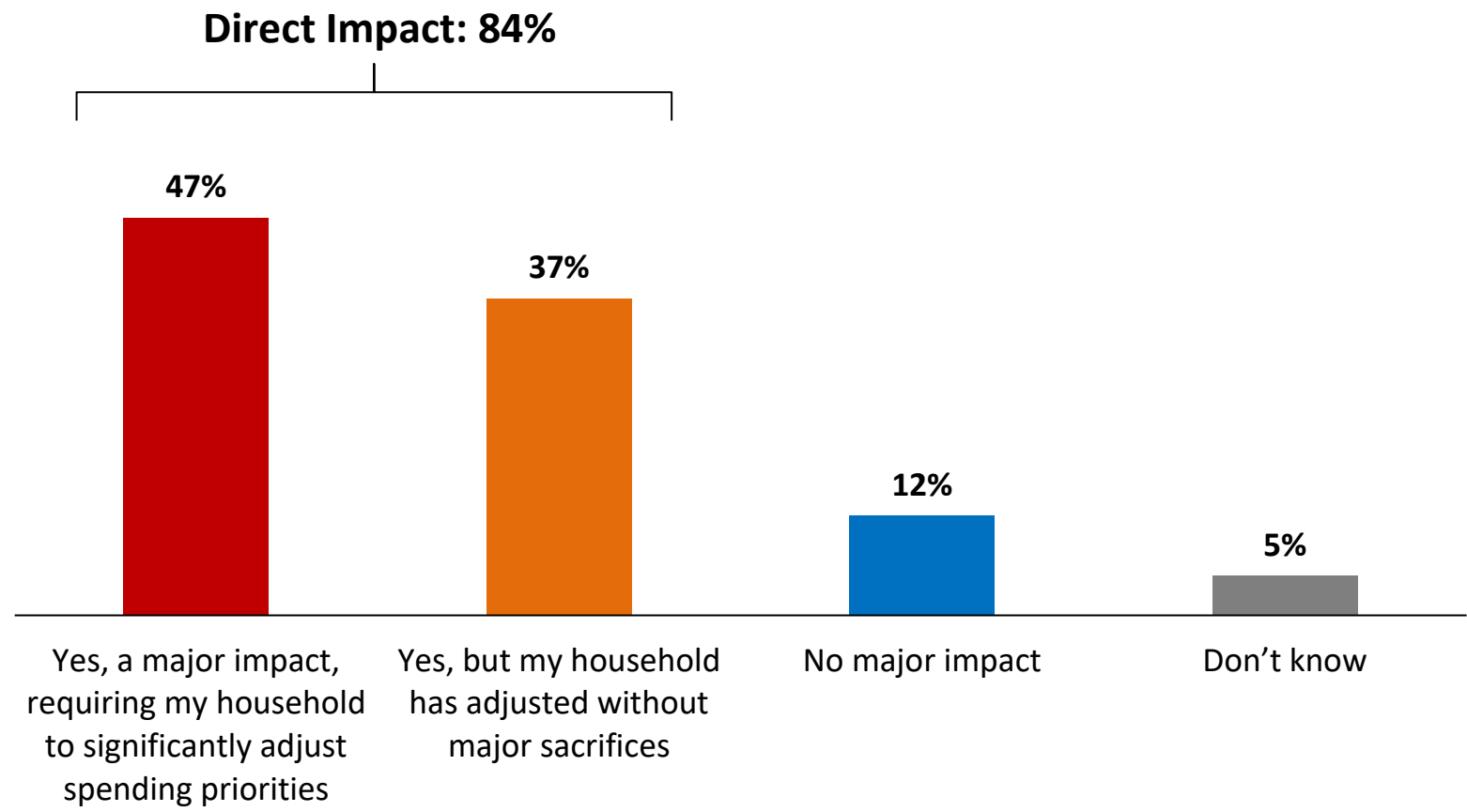
Affordability/Price Impacts

Impact of Inflation/Rising Cost of Living: Over 4-in-5 (84%) say inflation has had a direct impact on their household finances



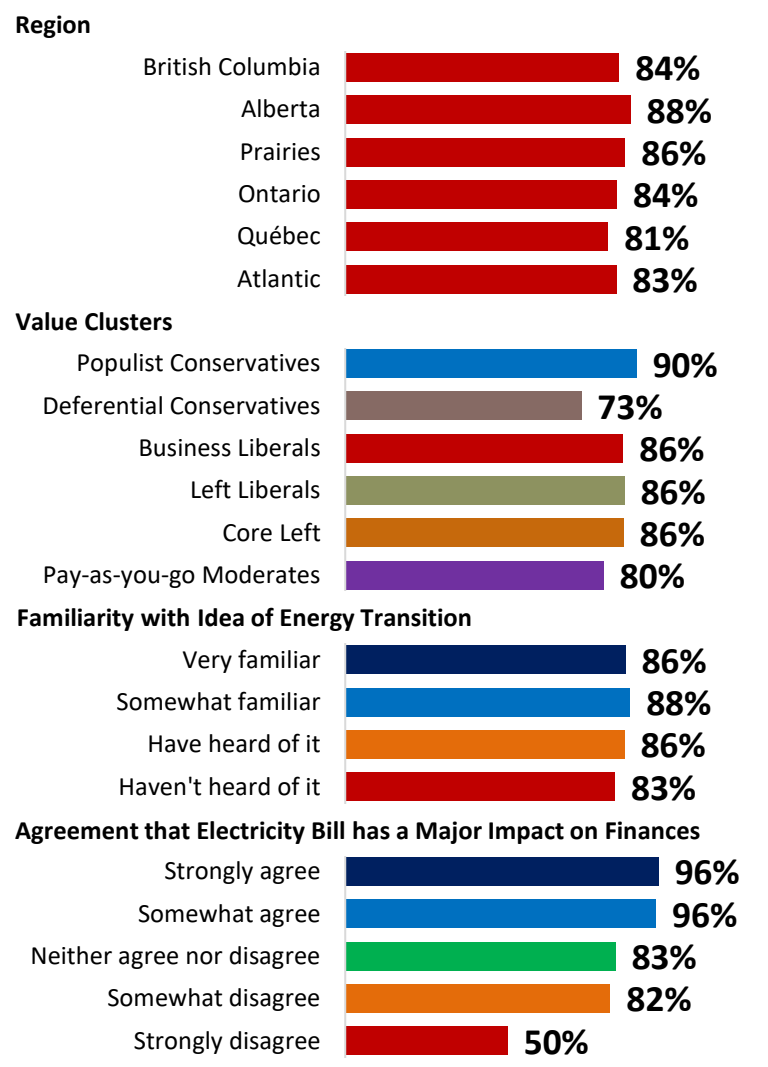
Over the past year, has inflation and the rising cost of living had a direct impact on your household's current financial situation?

[asked of all respondents; n=1,500]



Segmentation

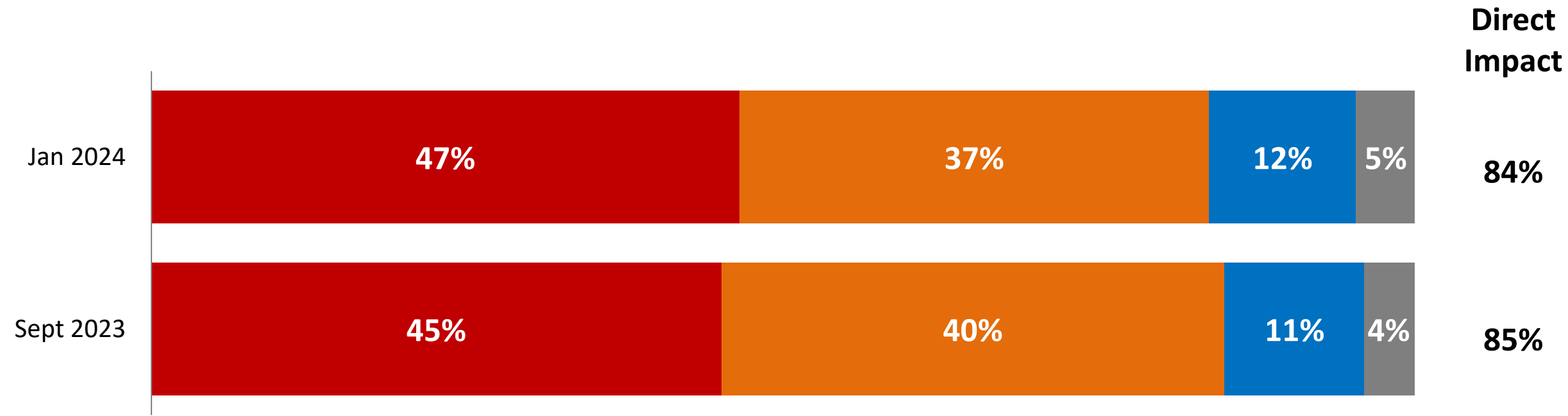
Those who say inflation has had a Direct Impact



Impact of Inflation/Rising Cost of Living – Tracking: Perspectives on the impact of inflation on household finances have remained unchanged



Over the past year, has inflation and the rising cost of living had a direct impact on your household's current financial situation?
[asked of all respondents; n=1,500]



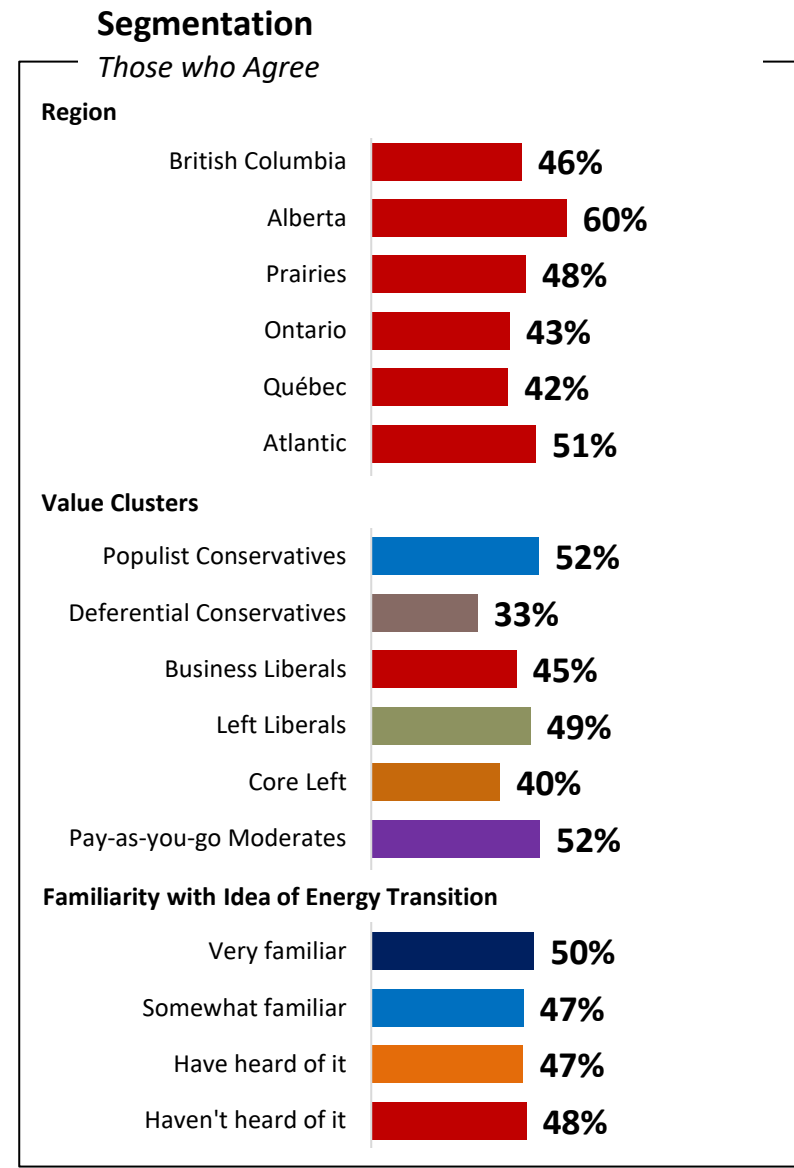
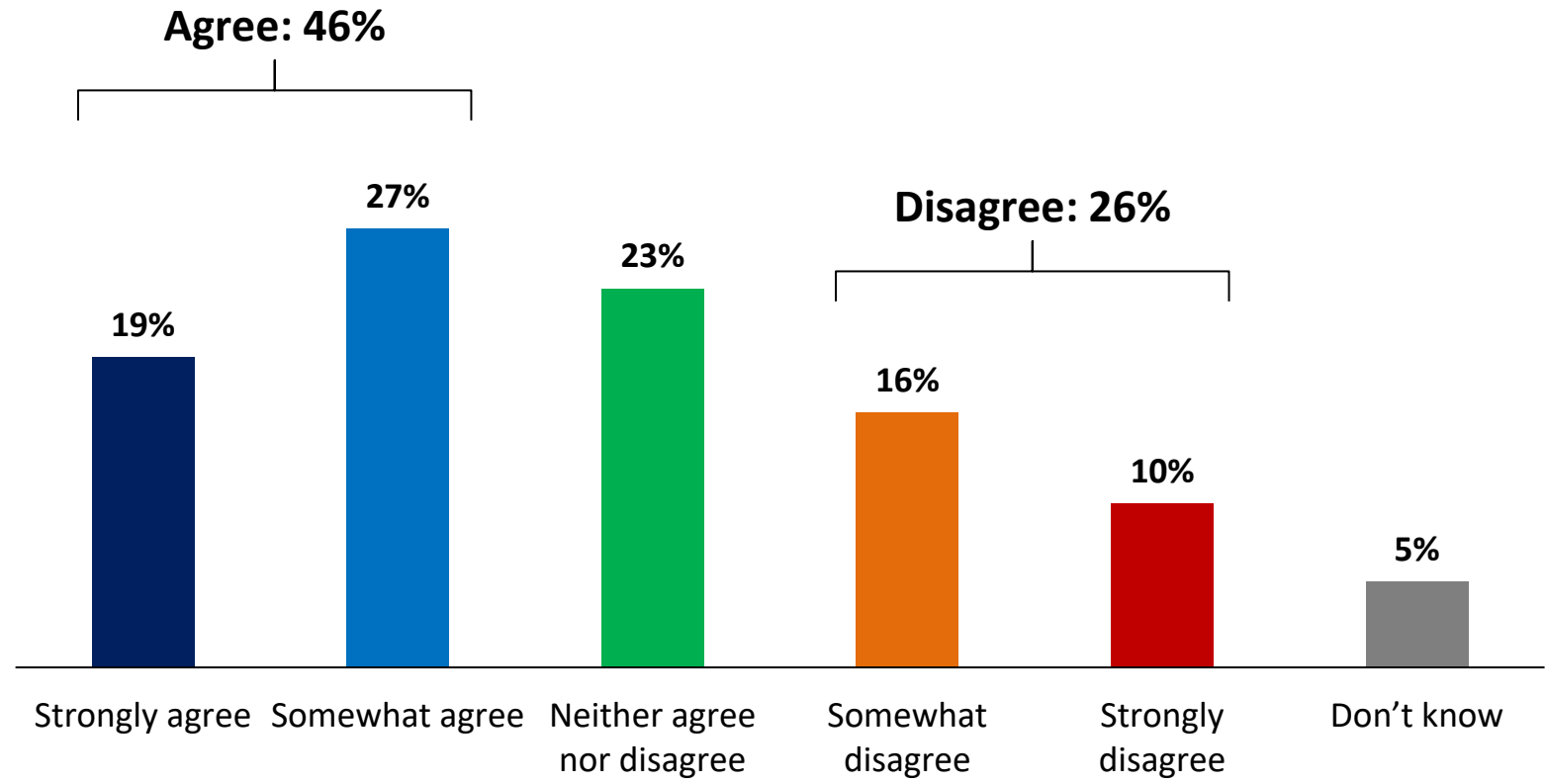
- Yes, a major impact, requiring my household to significantly adjust spending priorities
- Yes, but my household has adjusted without major sacrifices
- No major impact
- Don't know

Affordability: 46% agree their electricity bill has a major impact on their finances; higher among Albertans (60%) and Atlantic Canadians (51%)

Q Do you agree or disagree with the following statement?

My electricity bill has a major impact on my finances and requires I do without other important priorities.

[asked of all respondents; n=1,500]

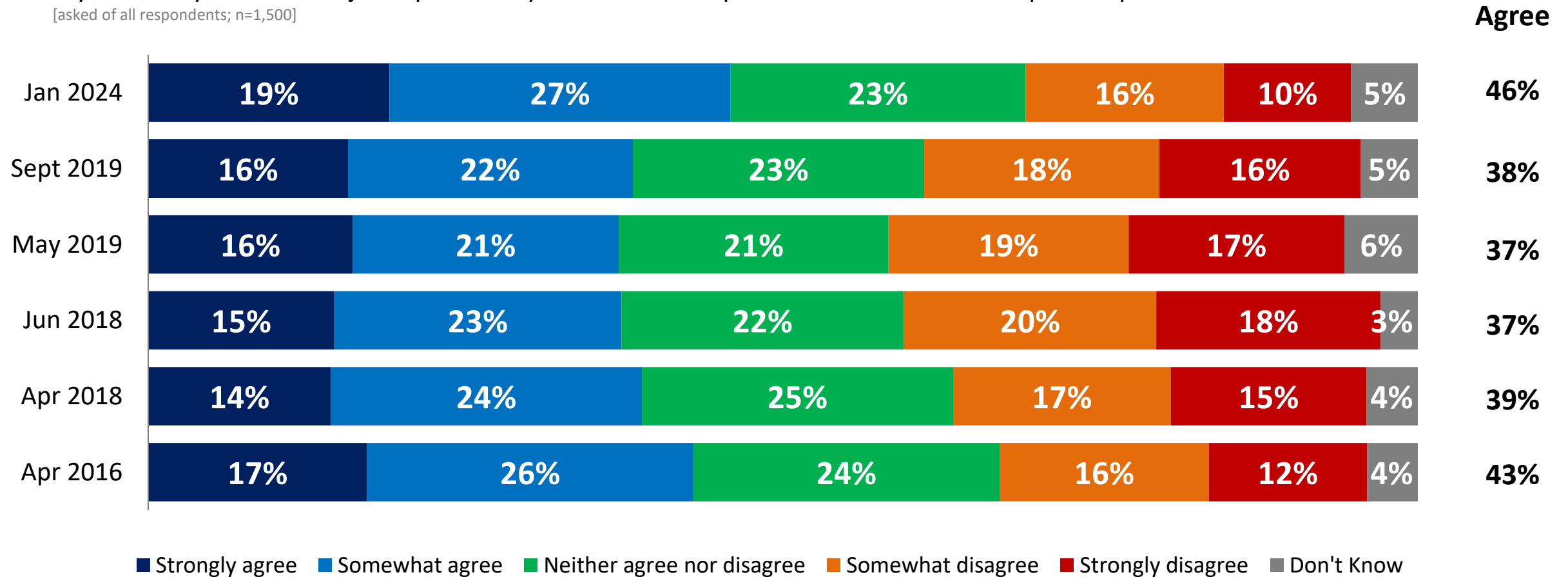


Affordability – Tracking: Agreement electricity bill has major impact on finances up 8 points since Sept ‘19; highest since tracking began

Q Do you agree or disagree with the following statement?

My electricity bill has a major impact on my finances and requires I do without other important priorities.

[asked of all respondents; n=1,500]



NOTE: Question wording was slightly different from April 2016 to September 2019, “Thinking about electricity, would you agree or disagree with the following statement? The cost of my electricity bill has a major impact on my finances and requires I do without some other important priorities”.

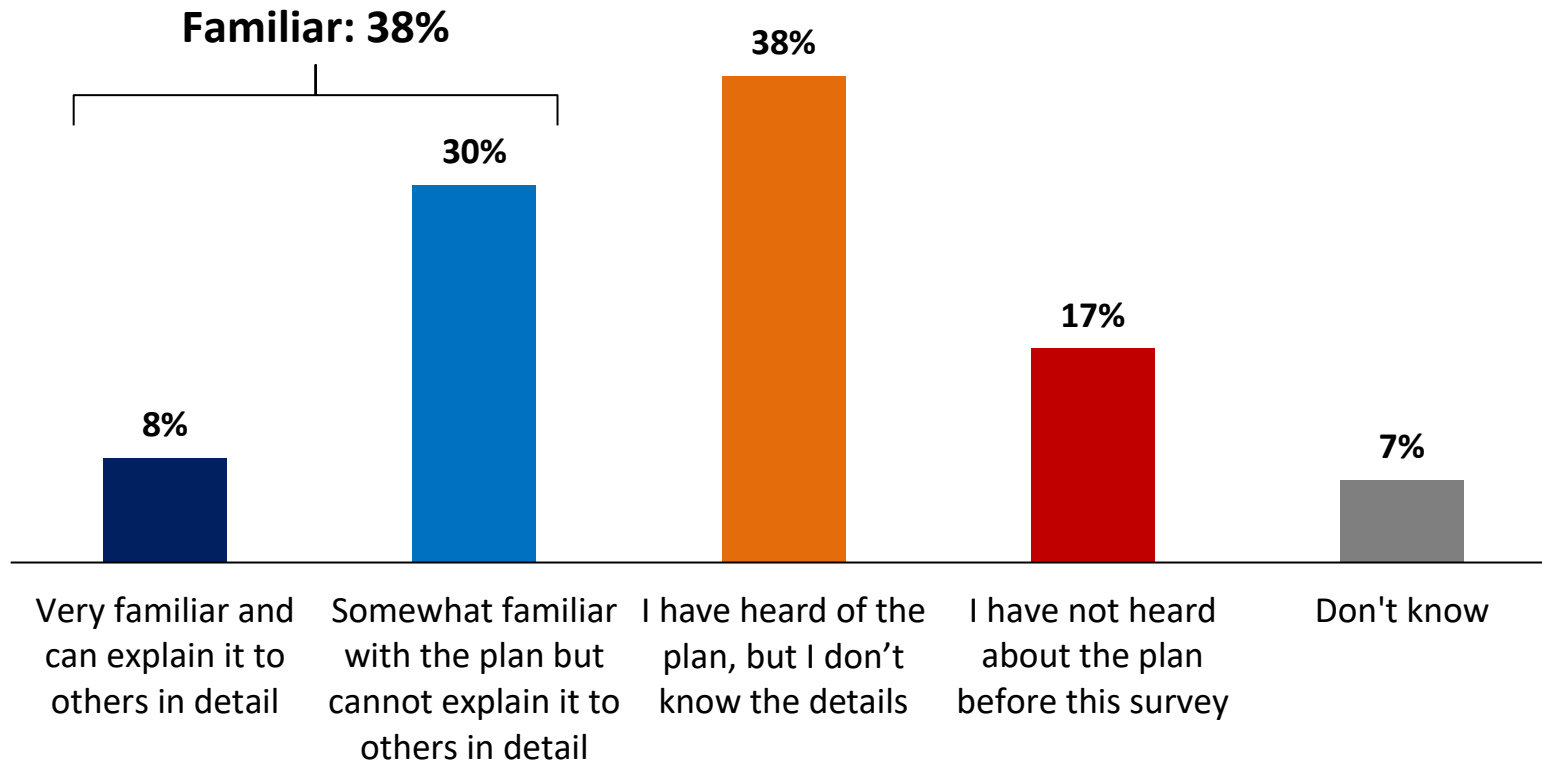
Federal Government Net-Zero Electricity Commitment

Familiarity with Federal Government's Plan: 2-in-5 (38%) are familiar with the proposed plan; higher among Time for Change voters



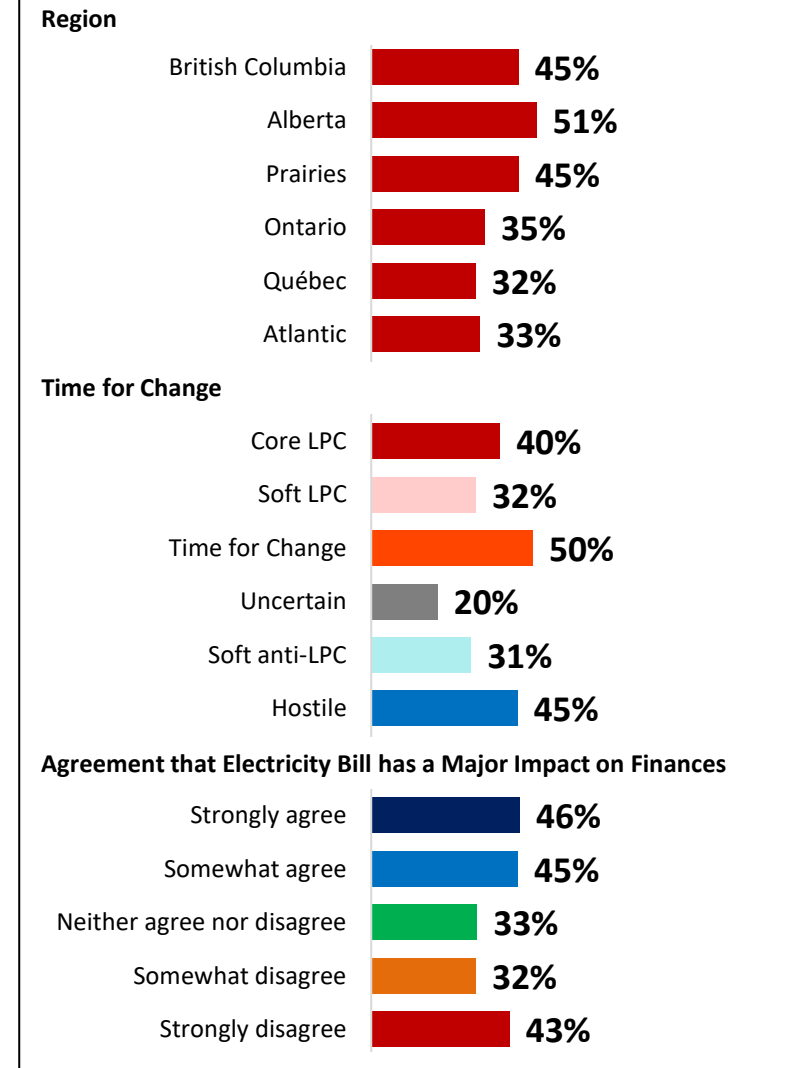
How familiar are you with the Federal government's proposed plan for the electricity sector to achieve net zero climate change emissions by 2035?

[asked of all respondents; n=1,500]



Segmentation

Those who are Familiar

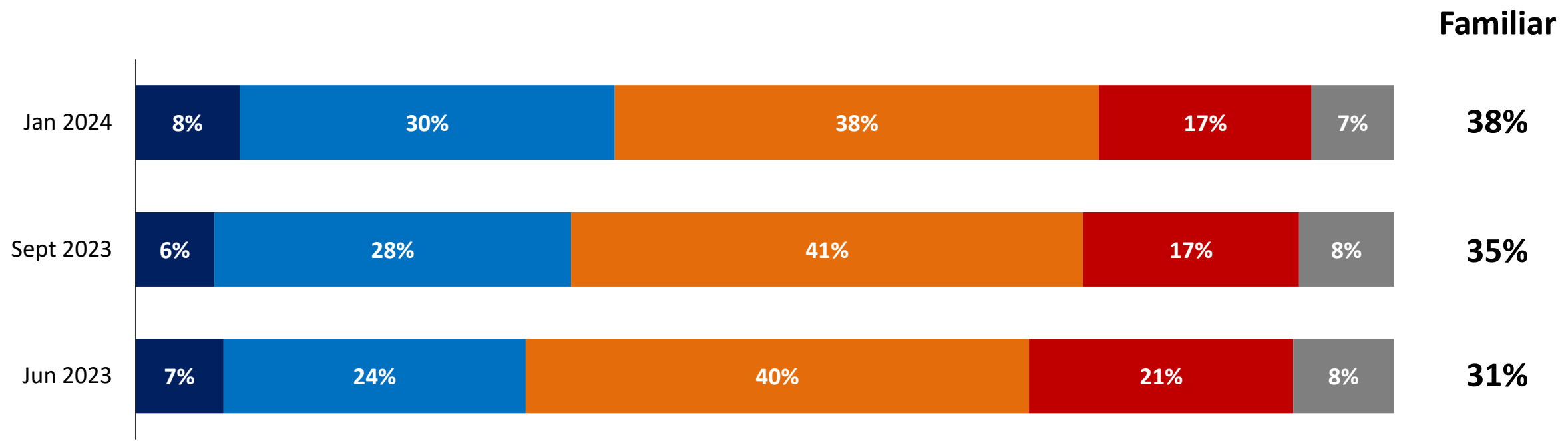


Familiarity with Federal Government’s Plan – Tracking: Familiarity with the federal government’s plan for net zero by 2035 on an upward trend



How familiar are you with the Federal government’s proposed plan for the electricity sector to achieve net zero climate change emissions by 2035?

[asked of all respondents; n=1,500]



- Very familiar and can explain it to others in detail
- Somewhat familiar with the plan but cannot explain it to others in detail
- I have heard of the plan, but I don't know the details
- I have not heard about the plan before this survey
- Don't know

NOTE: The wording for June 2023 was “How familiar are you with the proposed clean energy standard plan for the electricity sector to achieve net zero climate change emissions by 2035?” In addition, the wording for the response “Very familiar and can explain it to others in detail” was worded as “I understand the details and can explain them to others” last wave.

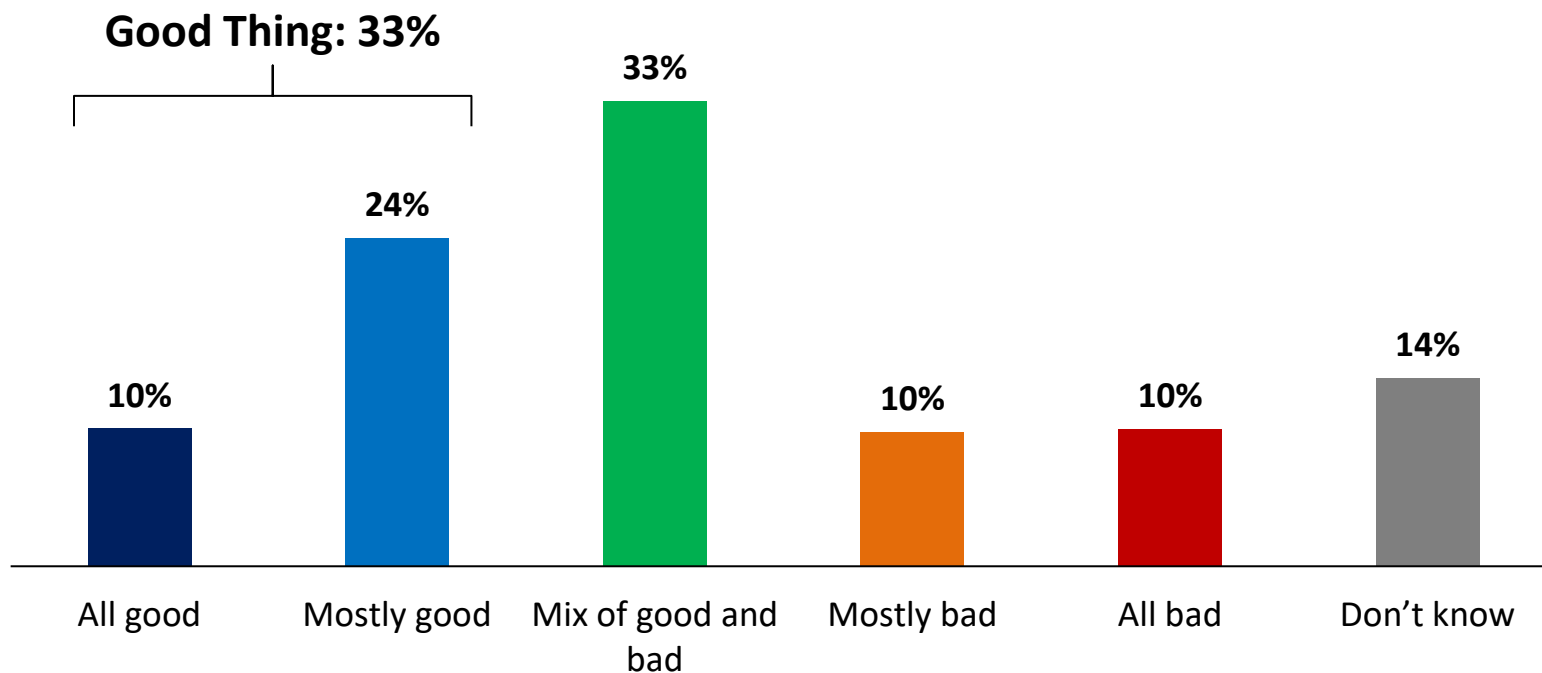
Impression of Clean Energy Regulations: 1-in-3 think Clean Energy Regulations are a good thing; 1-in-2 Time for Change voters agree



The Federal government's proposed plan, known as the Clean Energy Regulations, will require provincial electricity grids to shift from using fossil fuels to generate electricity to non-emitting generation to reduce greenhouse gas emissions by 2035.

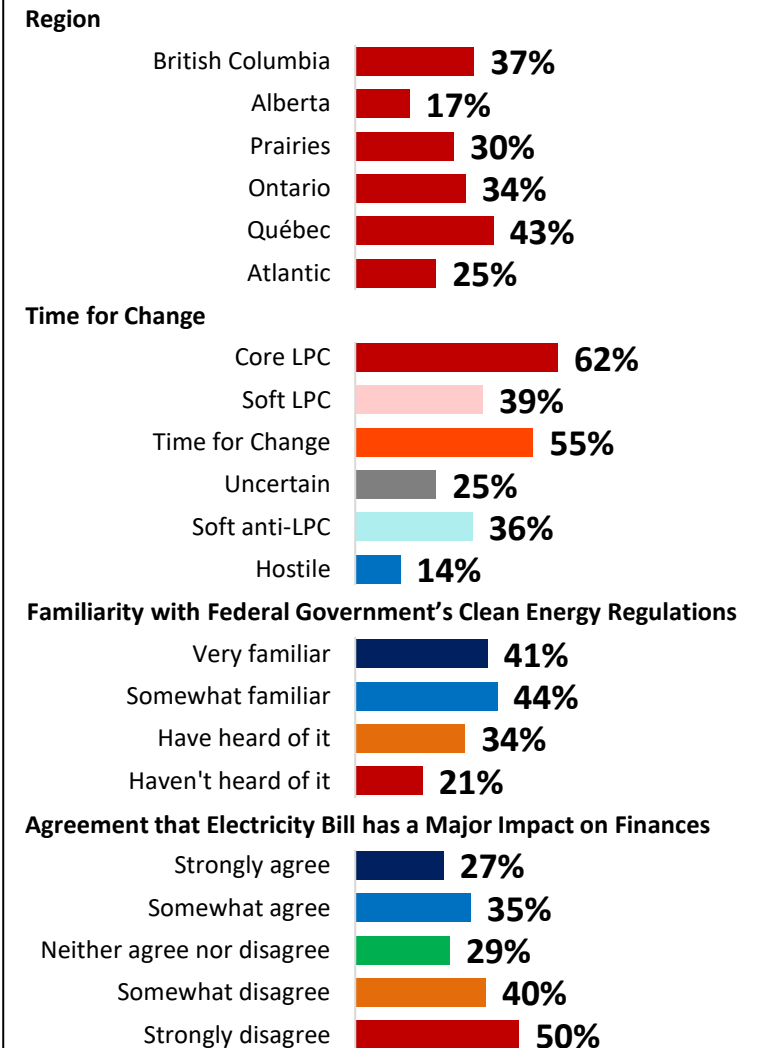
From what you know or based on your first impression, does this plan sound like a good thing or a bad thing?

[asked of all respondents; n=1,500]



Segmentation

Those who say Good Thing



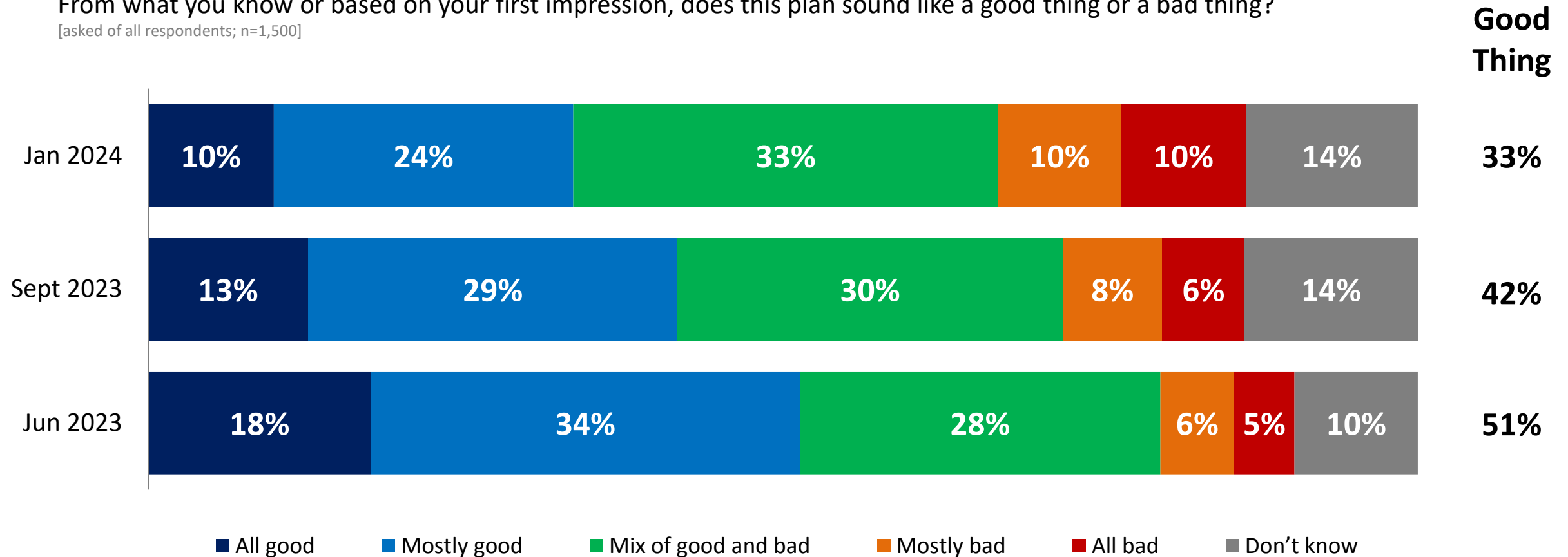
Impression of Clean Energy Regulations – Tracking: Impression of Clean Energy Regulations worsening, down 18 points since Jun '23



The Federal government's proposed plan, known as the Clean Energy Regulations, will require provincial electricity grids to shift from using fossil fuels to generate electricity to non-emitting generation to reduce greenhouse gas emissions by 2035.

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

[asked of all respondents; n=1,500]



NOTE: The wording for June 2023 was "A clean energy standard will require provincial electricity grids to shift from using fossil fuels to generate electricity to non-emitting generation to reduce greenhouse gas emissions. From what you know or based on your first impression, does the clean energy standard sound like a good thing or a bad thing?"

View on Clean Energy Regulations: Preference to keep electricity rates affordable more common among those with a greater bill impact



There is a debate over the Clean Energy Regulations. Please indicate which of the following statements is closest to your own?

[asked of all respondents; n=1,500]

To address the climate emergency, we should move the electricity system to net zero climate change emissions by 2035, even if it means a significant increase in electricity rates to reach that goal.



We should be moving the electricity system to net zero climate change emissions, but we should be careful to avoid significant electricity rate increases, even if that delays reach the goal of net zero climate change emissions by 2035.

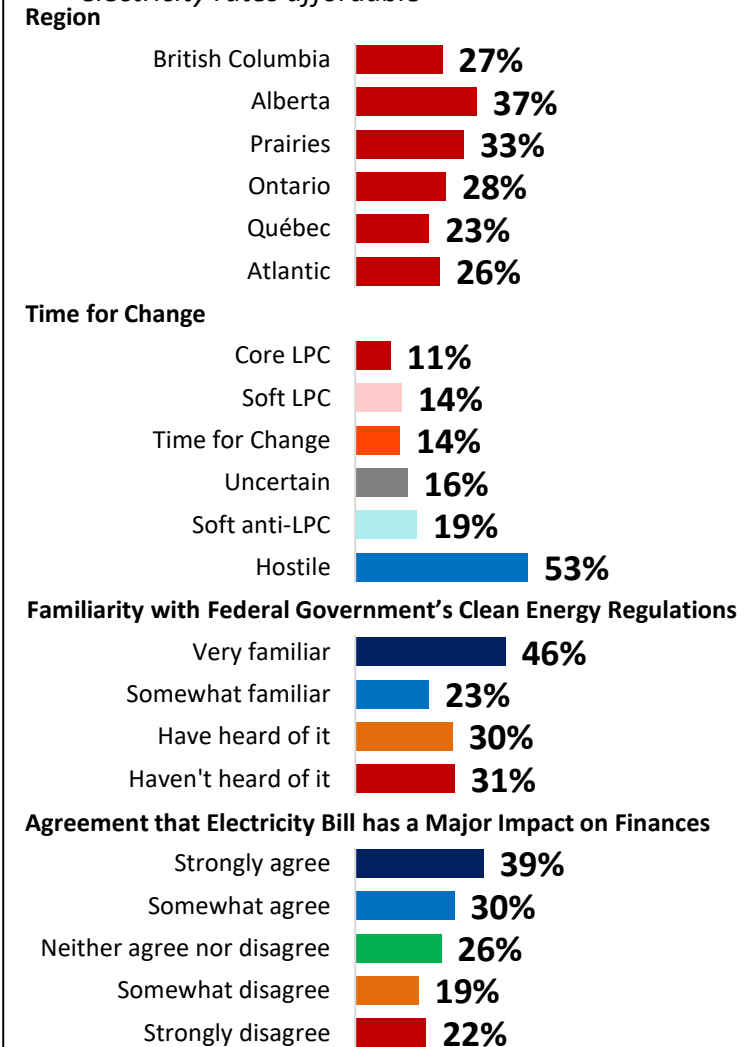


It is more important to me to keep electricity rates affordable than to move the electricity system to net zero climate change emissions.



Segmentation

Those who say it is more important to keep electricity rates affordable

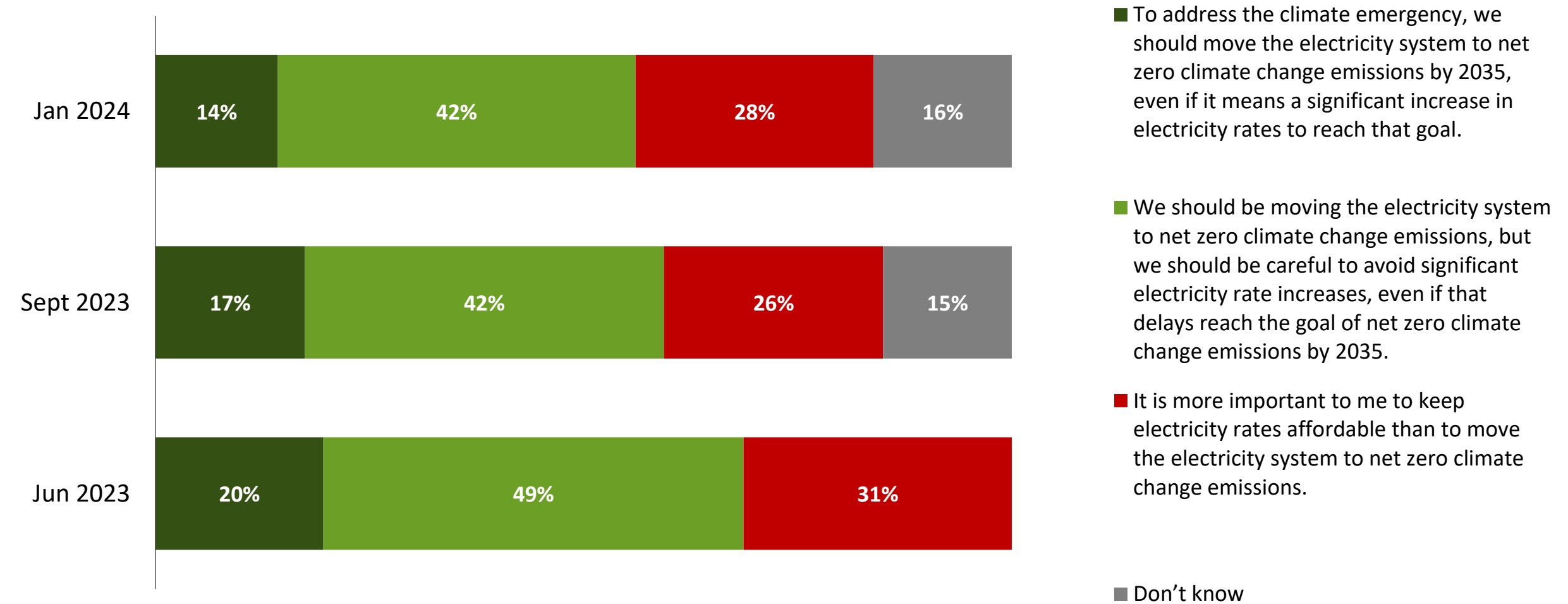


View on Clean Energy Regulations – Tracking: 2-in-5 (42%) say we need³⁶ to avoid significant electricity rate increases even if it delays net zero goal



There is a debate over the Clean Energy Regulations. Please indicate which of the following statements is closest to your own?

[asked of all respondents; n=1,500]



NOTE: "Don't know" was not included as an option when asked in June 2023.

Liberal vs. Conservative Approach: 49% support the Conservative approach; with 27% strongly supporting it

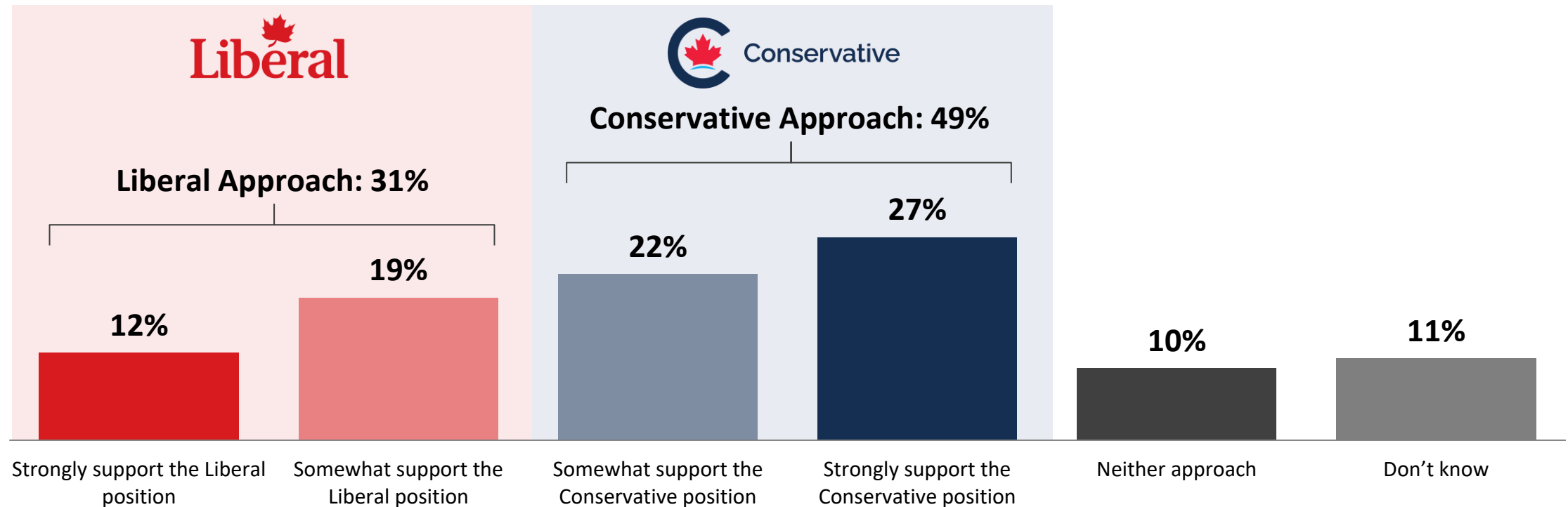


The Liberal Party of Canada supports establishing Clean Energy Regulations as a way for Canada to show leadership in moving to net zero climate change emissions by 2035, even if it means some increases in electricity prices.

The Conservative Party of Canada opposes establishing Clean Energy Regulations and prefers the federal government avoid increases in electricity prices and focus on encouraging investments in new technology to reduce emissions instead.

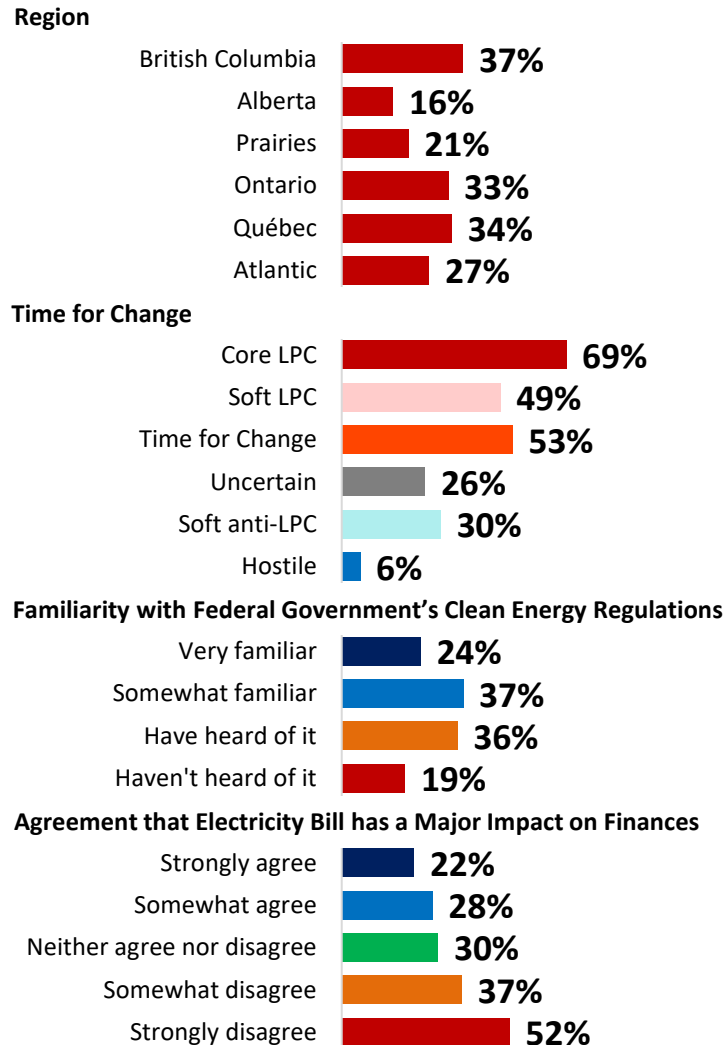
Do you tend to support the Liberal approach or the Conservative approach?

[asked of all respondents; n=1,500]

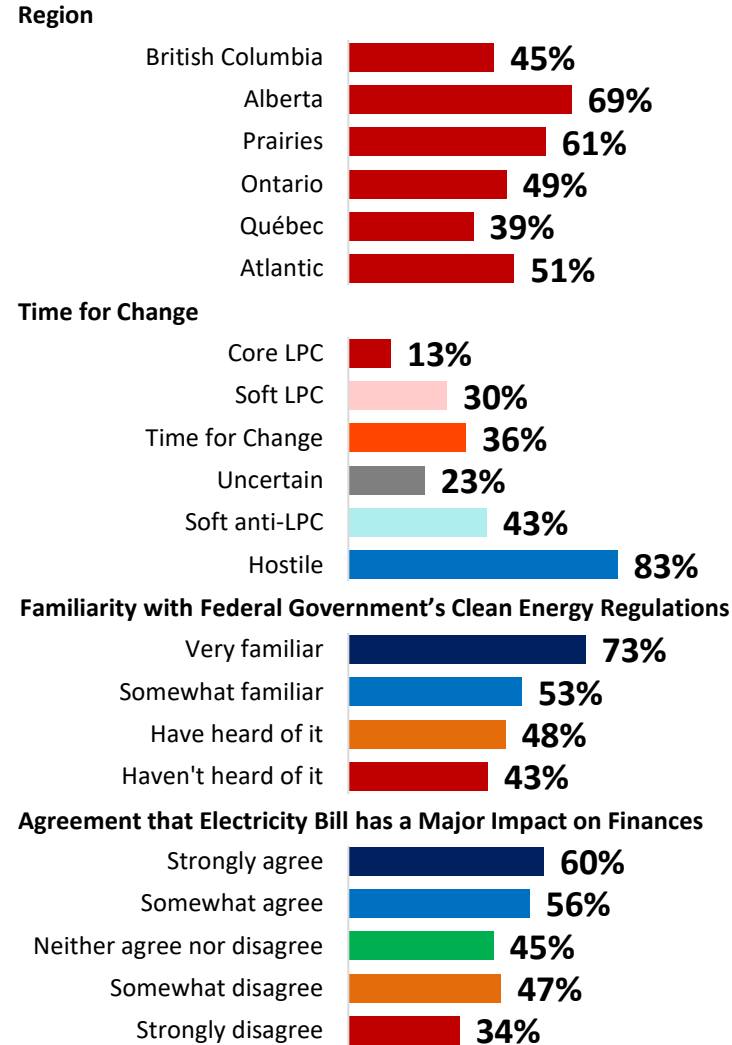


Liberal vs. Conservative Approach: Those very familiar with the Regulations are more likely to support the Conservative approach

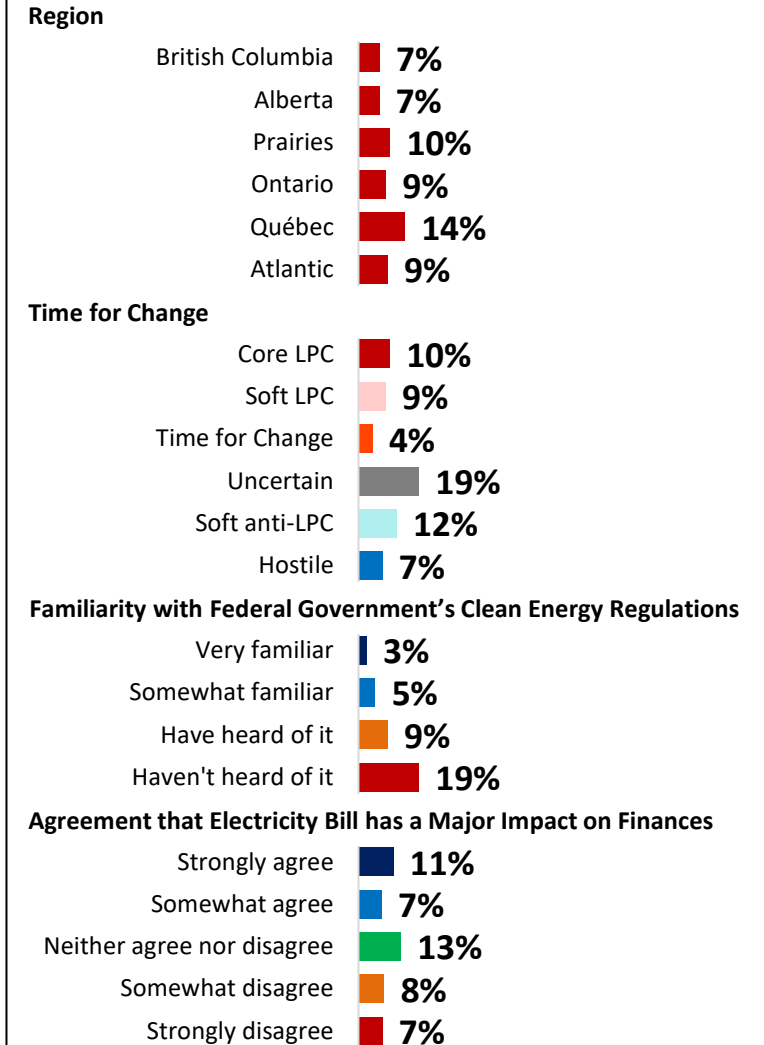
Support the Liberal Approach



Support the Conservative Approach



Support Neither Approach



Liberal vs. Conservative Approach to Energy Transition – Tracking:

Liberal approach support continues to fall, down 10 points since Jun '23

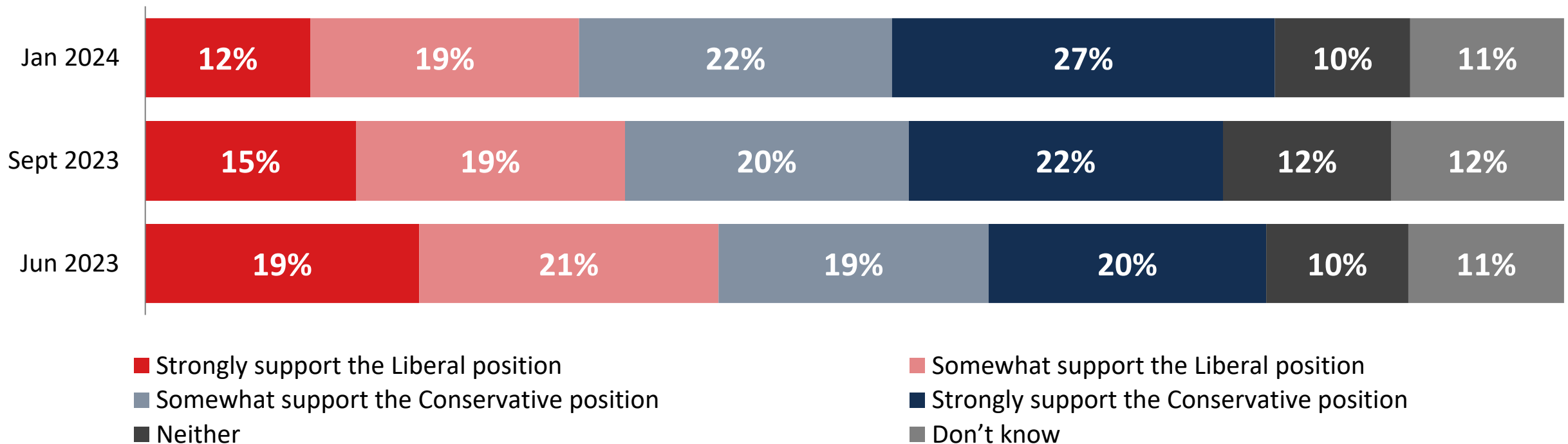


The Liberal Party of Canada supports establishing Clean Energy Regulations as a way for Canada to show leadership in moving to net zero climate change emissions by 2035, even if it means some increases in electricity prices.

The Conservative Party of Canada opposes establishing Clean Energy Regulations and prefers the federal government avoid increases in electricity prices and focus on encouraging investments in new technology to reduce emissions instead.

Do you tend to support the Liberal approach or the Conservative approach?

[asked of all respondents; n= 1,500]



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.

Survey Methodology

These are the results of an online survey conducted between January 4th and January 16th, 2024.

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 participants from the panel and weighted to ensure that the overall sample's composition reflects that of the actual Canadian population according to Census data. Results are intended to approximate a probability sample.

Sample Size: n=2,185 Canadian citizens, 18 years or older. The results are nationally weighted to n=1,500 based on Census data from Statistics Canada.

Field Dates: January 4th and January 16th, 2024.

Weighting: Results are weighted by age, gender, region, education, and past federal vote 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	163	7.5%	204	13.6%
Men 35-54	286	13.1%	238	15.9%
Men 55+	577	26.5%	285	19.1%
Women 18-34	275	12.6%	198	13.2%
Women 35-54	352	16.1%	247	16.6%
Women 55+	527	24.2%	322	21.5%

BC	369	16.9%	209	13.9%
AB	277	12.7%	168	11.2%
Prairies	152	7.0%	96	6.4%
ON	788	36.1%	581	38.7%
QC	448	20.5%	344	23.0%
Atlantic	151	6.9%	101	6.8%



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Building Understanding.