INNOVATIVE RESEARCH GROUP

Presentation

Social Permission + Grid Edge

September 29, 2025 | Ontario Energy Conference

Survey Methodology

The findings presented in this report are based on an online survey conducted by Innovative Research Group (INNOVATIVE).

WHO

National general population survey of Canadian adult (18yrs+).

Survey available in both English and French.

SAMPLE

The results are nationally weighted to n=2,000 based on Census data from Statistics Canada (*unweighted sample of n=2,079*)

DATE

Survey in field from September 9 to 14, 2025

METHOD

Online survey from representative panels.

Key Findings

01 Grid edge solutions are both an opportunity and a threat.

Residential programs can both reduce absolute system costs and give customers a sense of control over their bills. But designed or communicated poorly, grid edge solutions can trigger outrage by evoking big brother concerns.

02 We are in a critical early stage on public attitudes regarding the grid edge.

A minimal survey intervention created significant shifts in intention. Don't be fooled by initial positive numbers. And pay attention to intensity – passion equals action.

03 Talk *with* your customers, not *to* your customers.

Don't confuse trust and deference. As a result of everything the system has done over the years, customers are open to listening to you. But they are not inclined to simply take your word for things. You must prove your case to drive commitment to grid edge solutions.

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Social Permission Basics

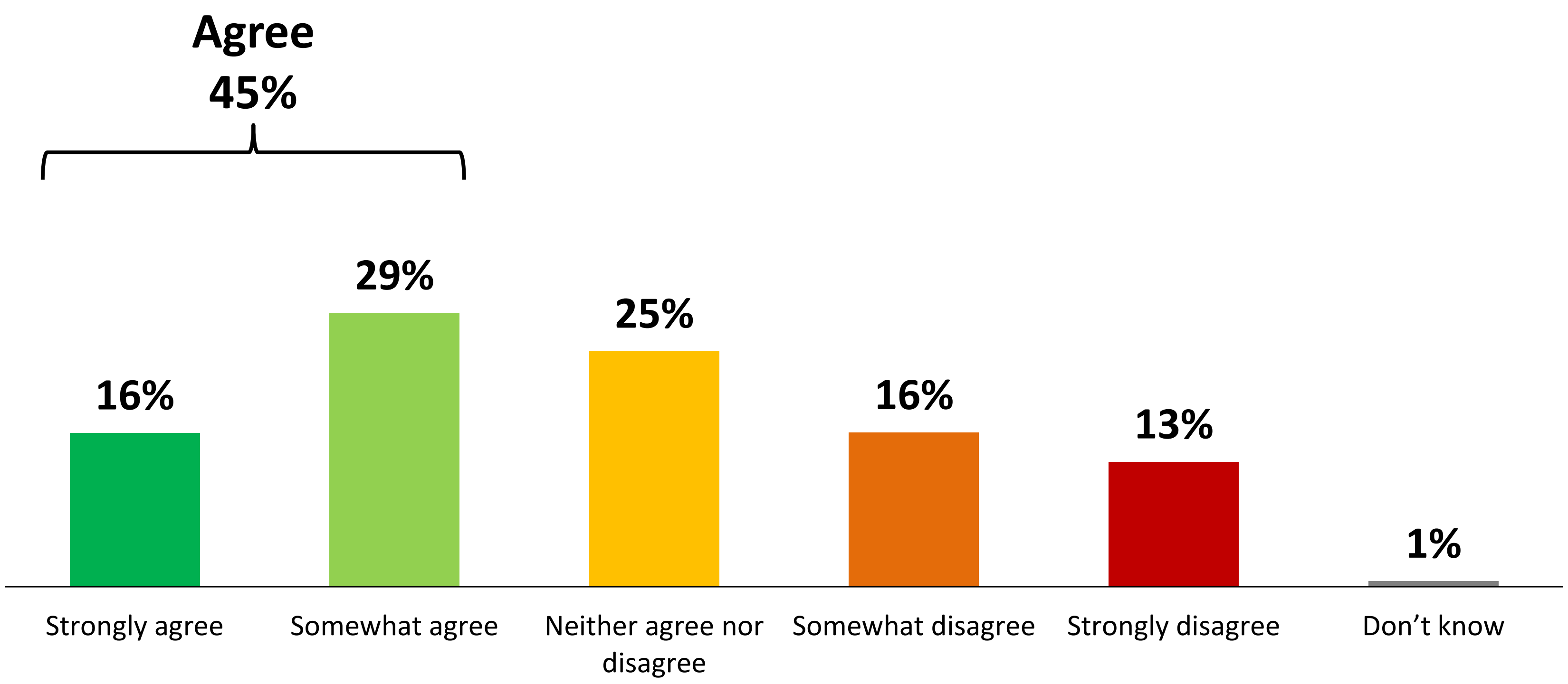
Electricity Bill:

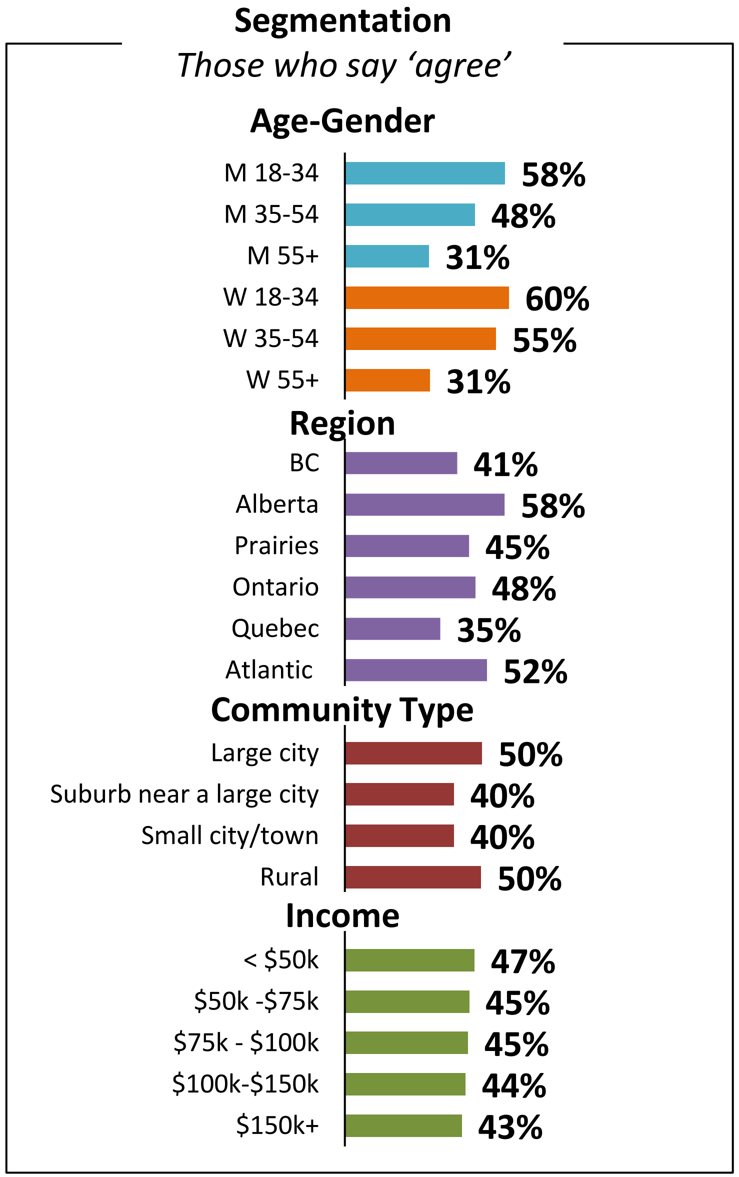
45% agree their electricity bill significantly impacts their finances; higher among younger Canadians

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=2,000]





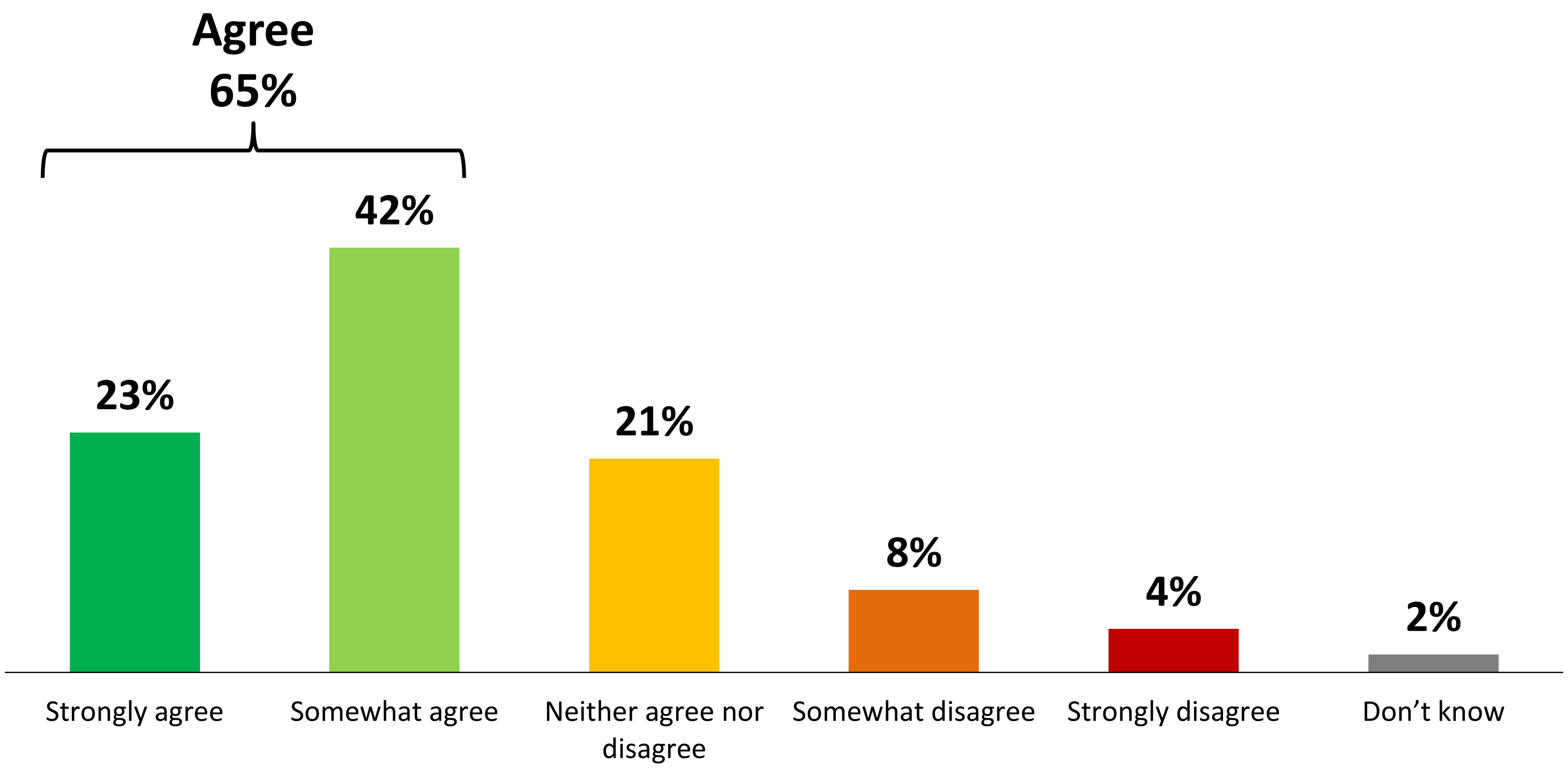
Electricity Service:

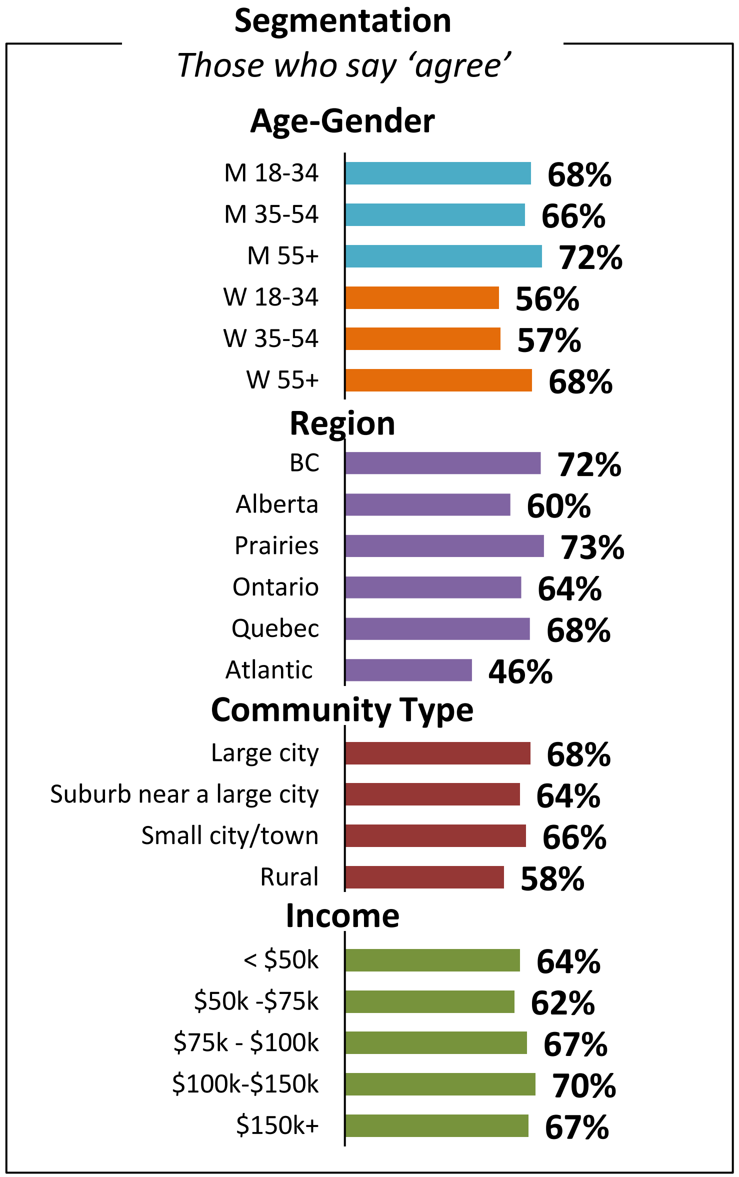
65% agree their province's electricity system serves them well

Q Do you agree or disagree with the following statement?

Customers are well served by the electricity system in [PROVINCE].

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



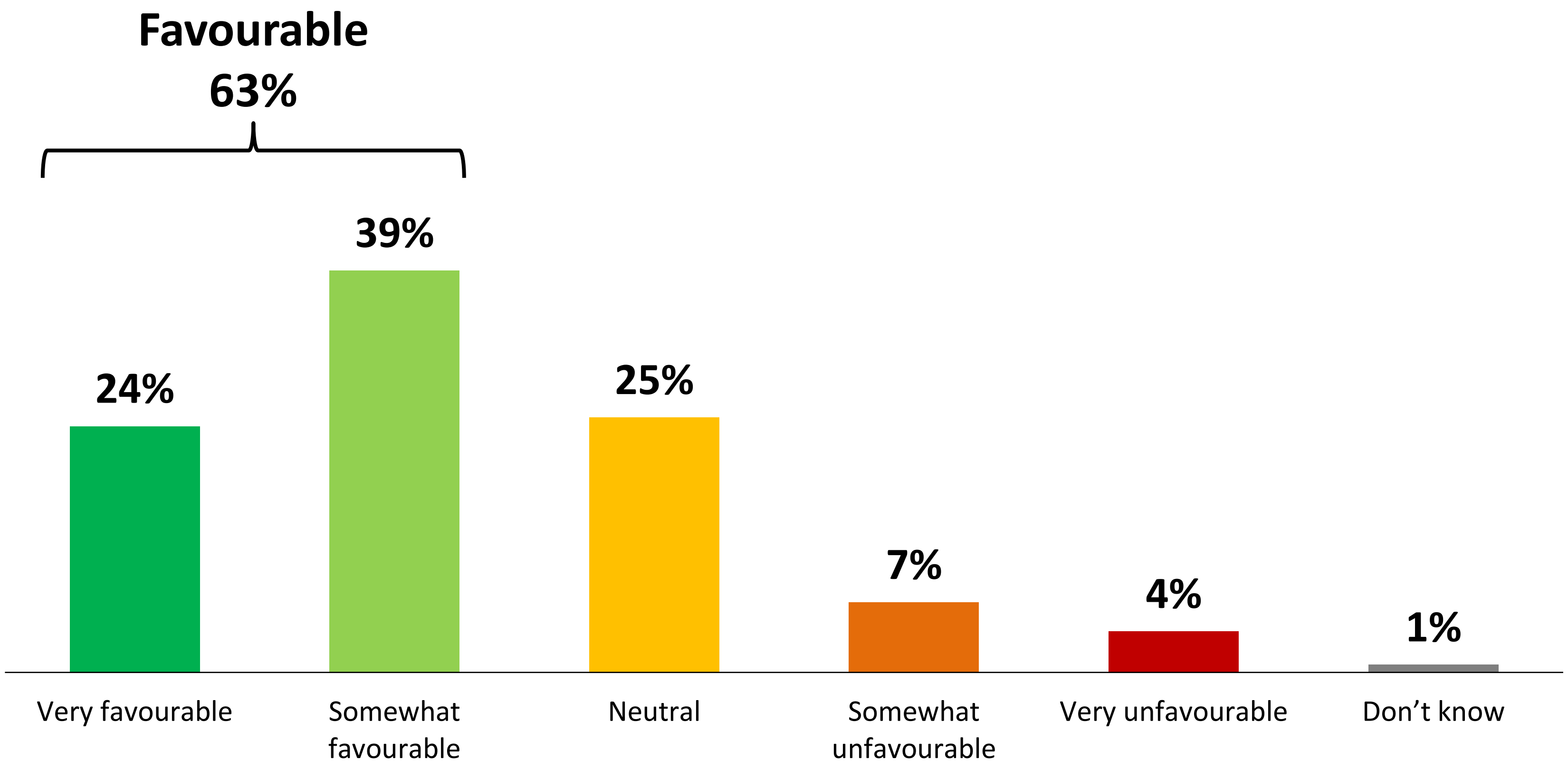


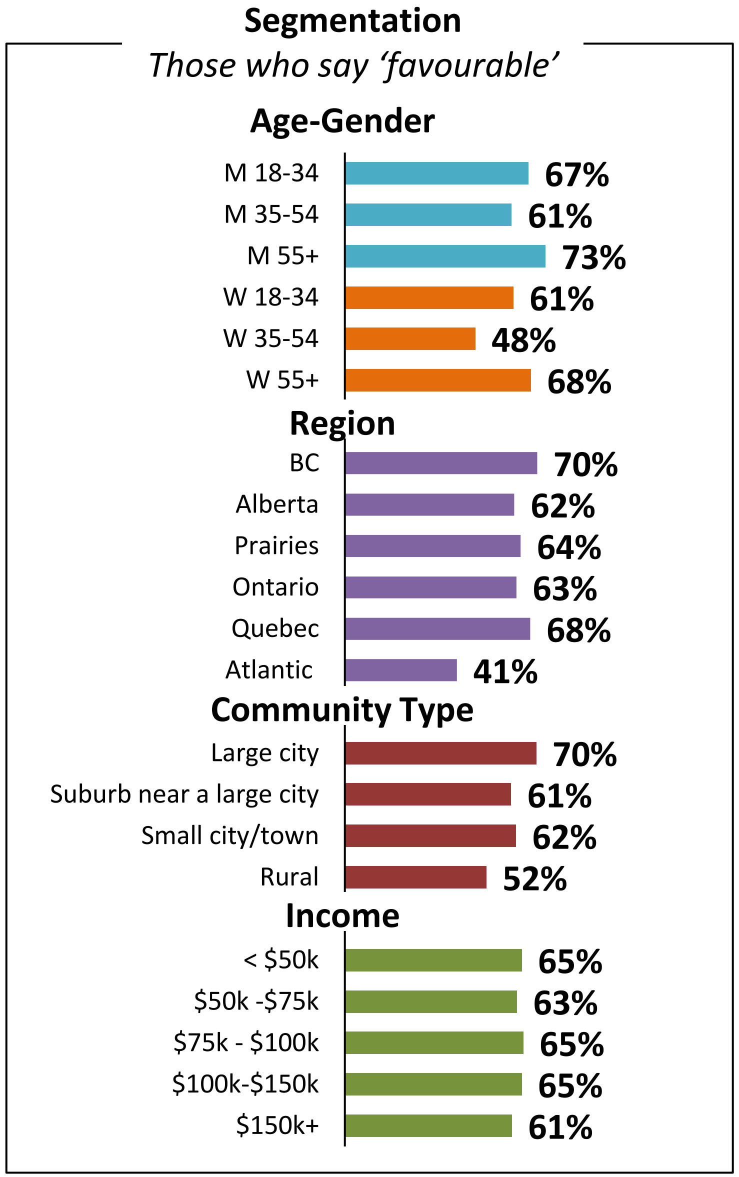
Utility Impression:

63% favorable impression of their electricity provider; highest in large cities vs. lowest in rural areas

Q Thinking about the company that sends you your electricity bill, would you say your overall impression of this company is….

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

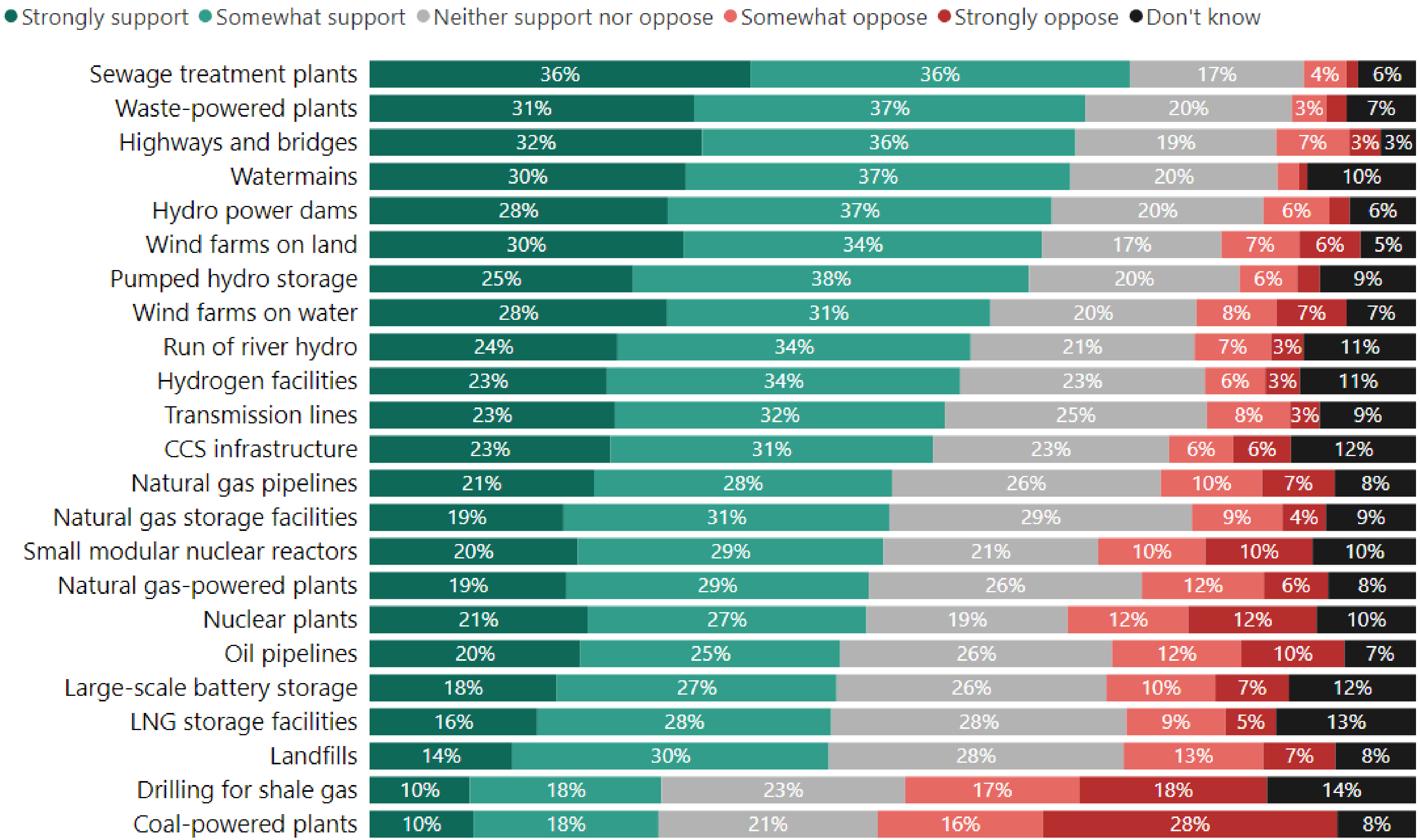




Infrastructure Project Support:

Shale gas drilling and coal-fired power plants least supported forms of infrastructure projects

Q Generally speaking, would your initial reaction be to support or oppose a proposal to build each of the following projects in your province?
[asked of all respondents]

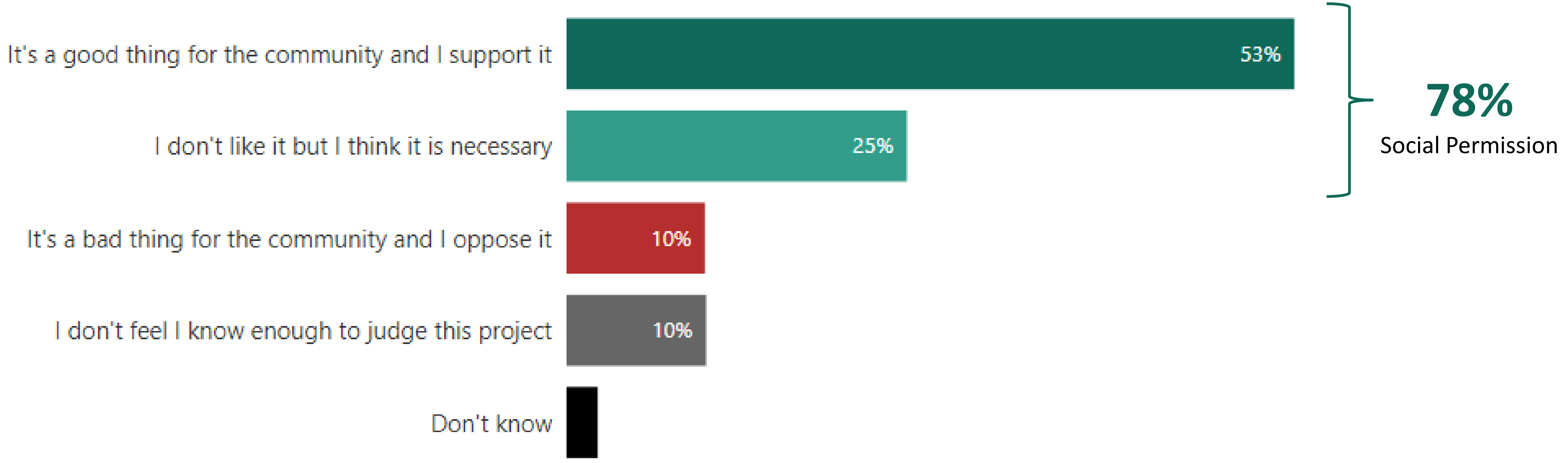


Social Permission:

Overall, 3-in-4 (78%) would give social permission to move ahead with proposed infrastructure projects

Q Which of the following best represents your view of that project?*

[asked of all respondents]



* This question follows a series of questions asking respondents about their awareness of specific proposal projects near or in their community over the past few years. The closest project to the respondent's community is the "project" referenced in this question.

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Project Risk Mitigation:

Five questions to minimize project siting or rate increase outrage

Over 15 years of tracking locally unwanted land uses in Canada and the USA taught us that there are five hurdles a project needs to cross.

People may not like a particularly infrastructure project (or a price increase to pay for it), but if you can answer ”yes” to the following **five key questions**, the public are more likely to accept it as *necessary*. Answer “no” to any of the five key questions, your project is at serious risk of failure.

1. *Does this project really need to be built?*
2. *Can you not build this project somewhere else?*
3. *Have you done all you can to minimize the number of people directly impacted?*
4. *Have you done all you can to minimize the impact on the people who must be affected (i.e. mitigation, compensation, etc.)?*
5. *Have the people who will be directly affected been treated fairly during this process?*

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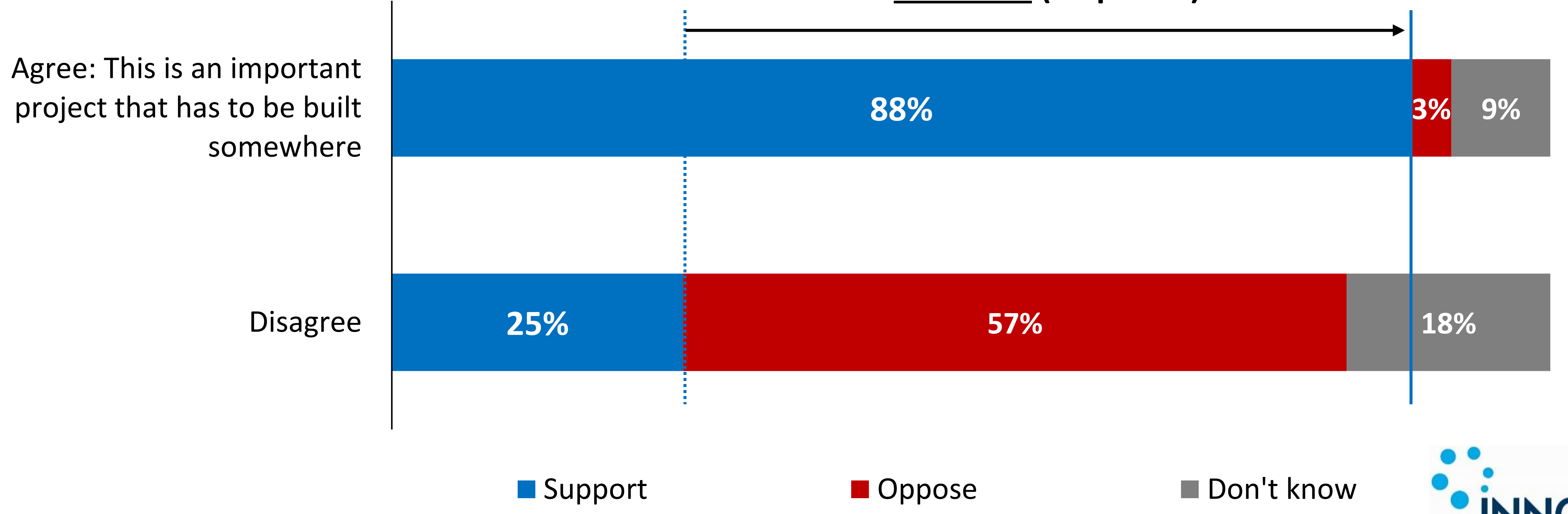
Necessity is key to social permission

When people agree that “a project needs to be built somewhere”, they are 3.5x more likely to give social permission to build it.

Q Social Permission to Build Infrastructure **BY** This is an important project that has to be built somewhere
[asked of those who selected a project ‘closest’ to their home in December 2023/ January 2024, n=951]

Social Permission to Build increases by 3.5 times (63 points)



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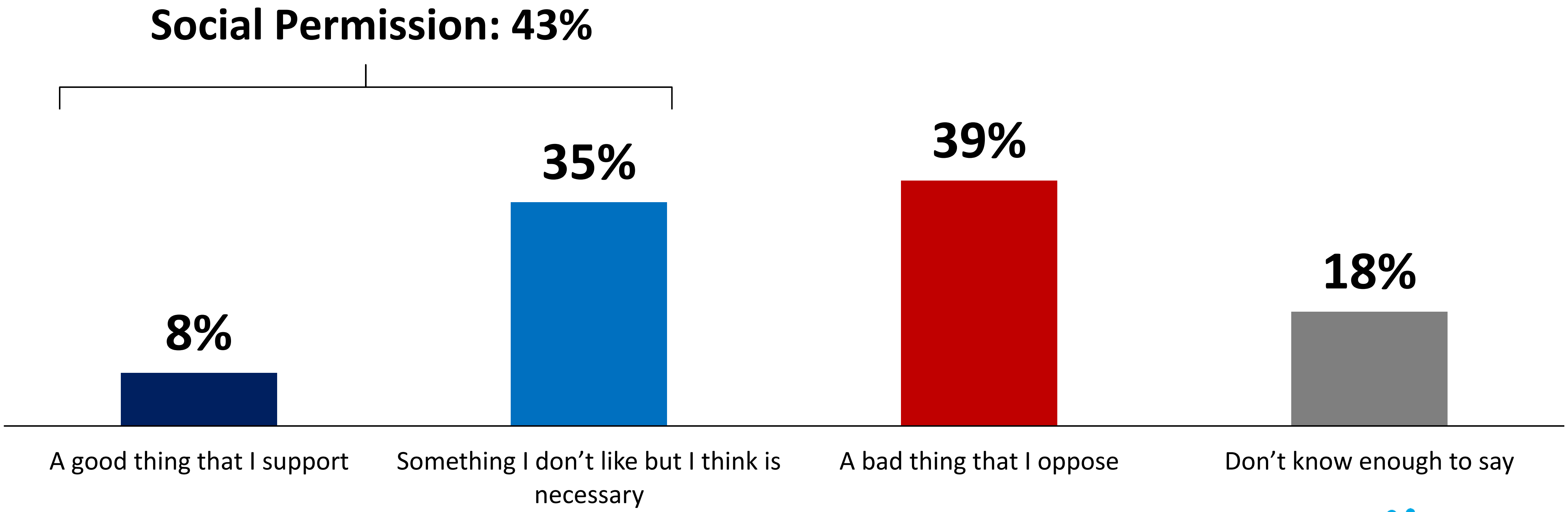
The Critical Social Permission Issue is Price

Q

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; January 2023, n=1,500]



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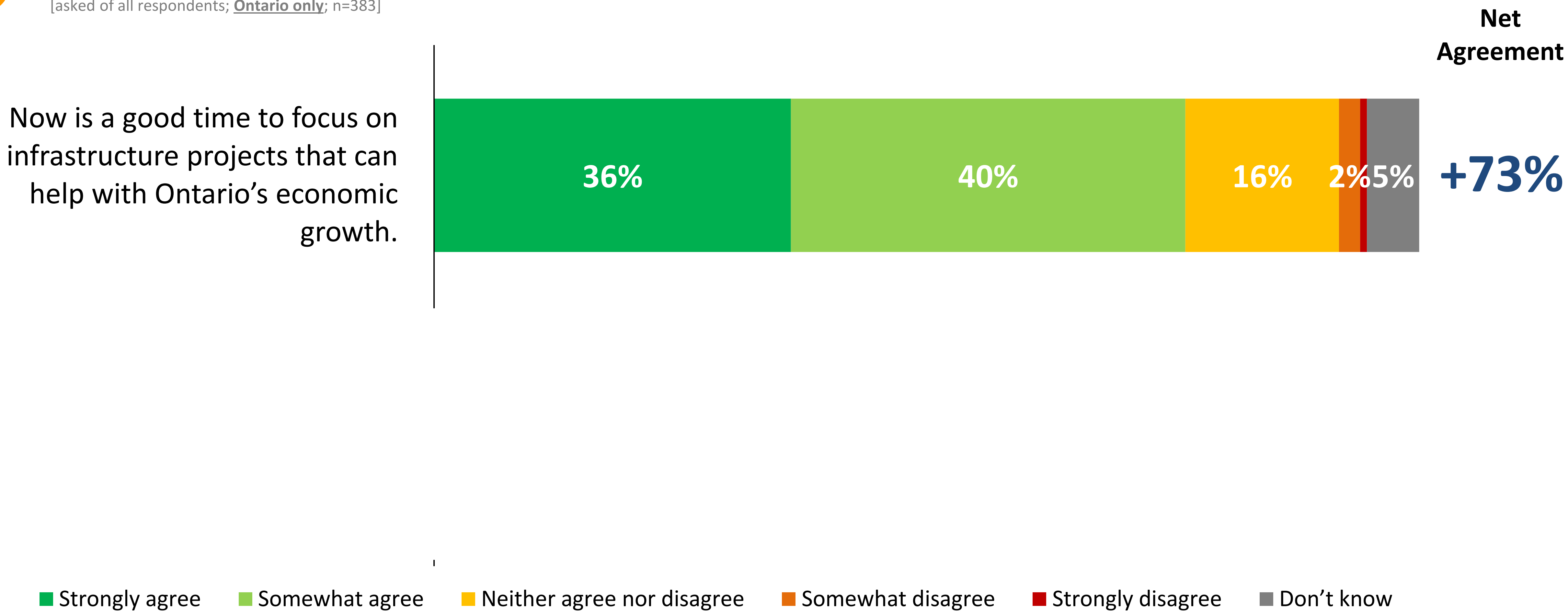
Grid Edge Primer

It’s Time to Build:

Ontarians agree that we need to invest but are more split on who should pay.

Q

To what extent do you agree or disagree with the following statements?
[asked of all respondents; **Ontario only**; n=383]



Data source: INNOVATIVE Omnibus, Ontario-wide, March 2025

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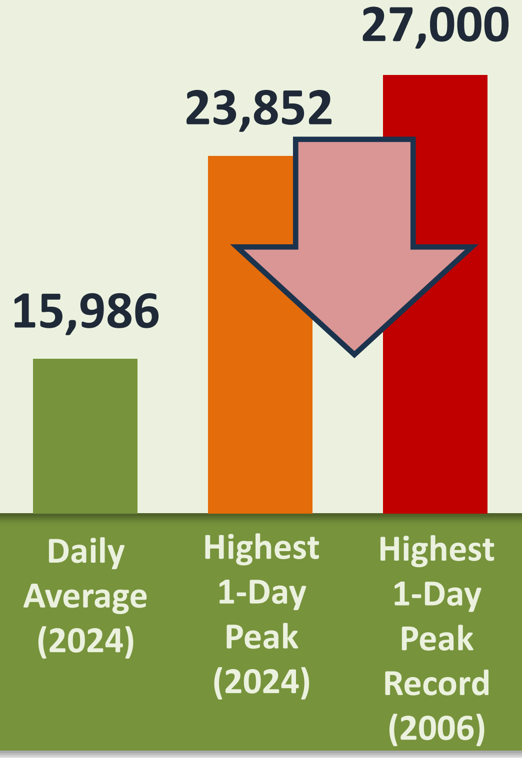
What Grid Edge Technology Offers

Lowering the burden upstream, empowering control downstream

1 Smarter Peak Management

Grid Edge adoption means utilities won't need to have oversized infrastructure for rare peak events. Lowering the cost for large infrastructure builds.

Ontario's Daily Electricity Demand (MW)



2 Empowering Customers

Customers will have more opportunities to participate in the system, giving a greater sense of control over their bill.

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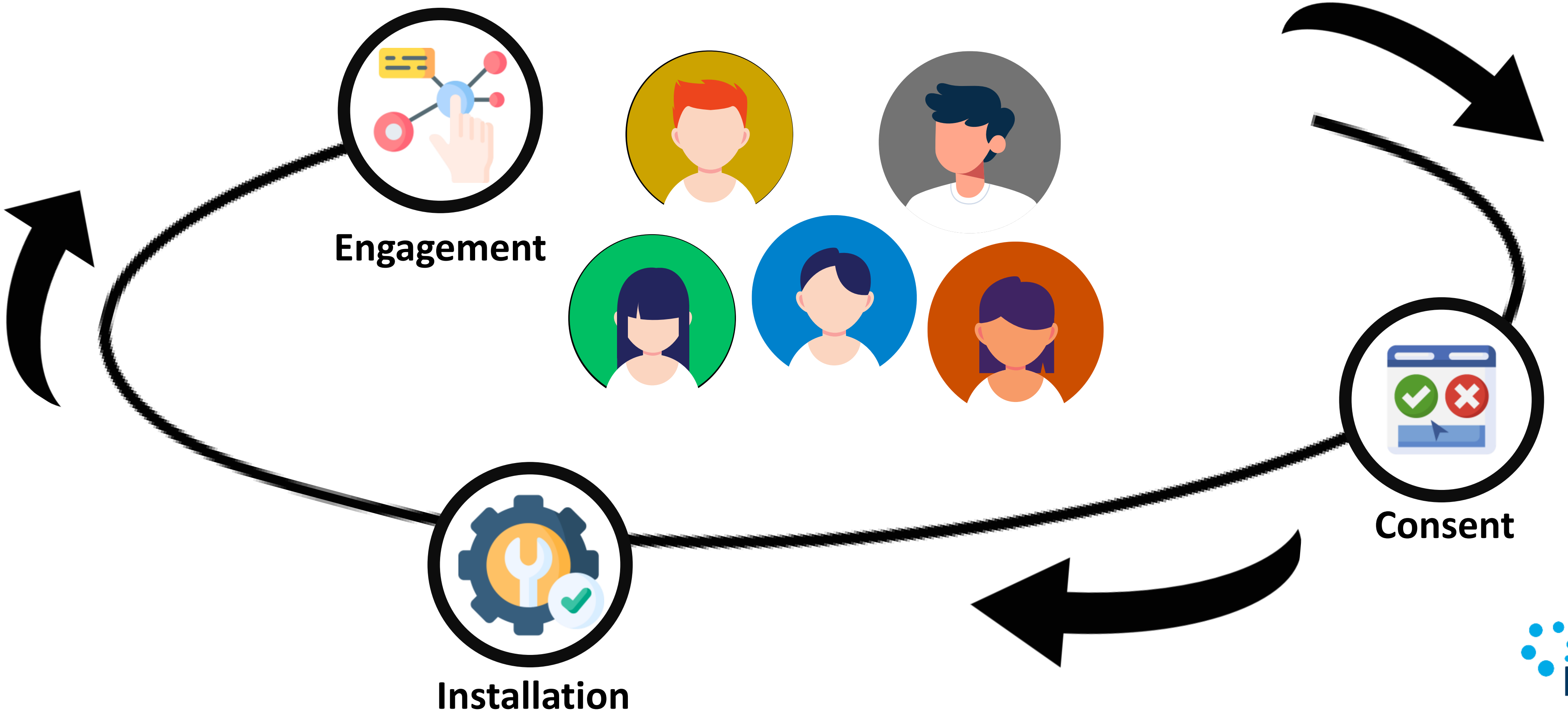
TECHNOLOGY ALONE ISN'T ENOUGH

Customer buy-in is the real driver of grid-edge success

Even the smartest tools need people to consent, install and engage. Without customer participation, initiatives can't succeed.



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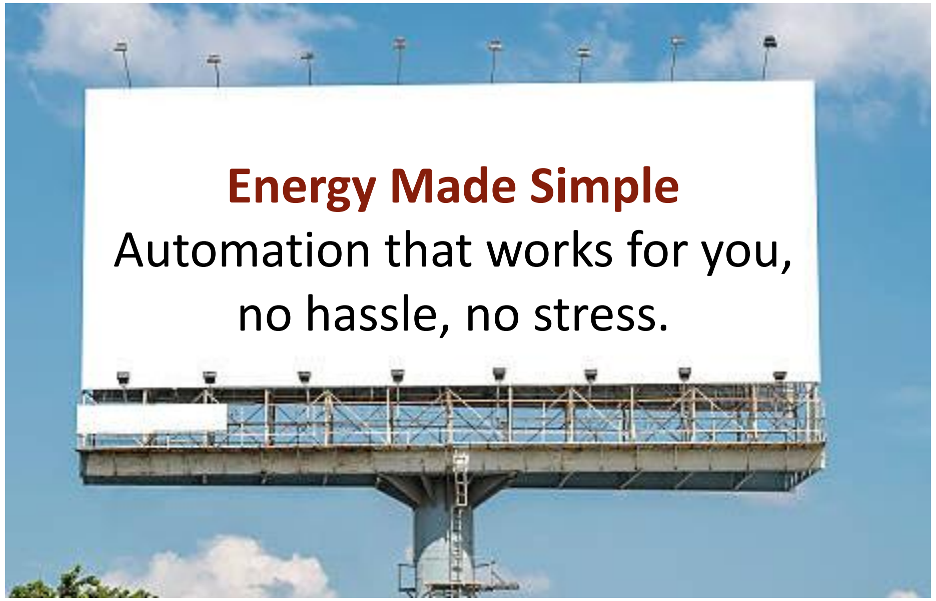
One Size Doesn’t Fit All

Customers respond to different motivators. By tailoring messages to their priorities —utilities can drive real engagement.

Cost-Conscious

Environmental



Convenience

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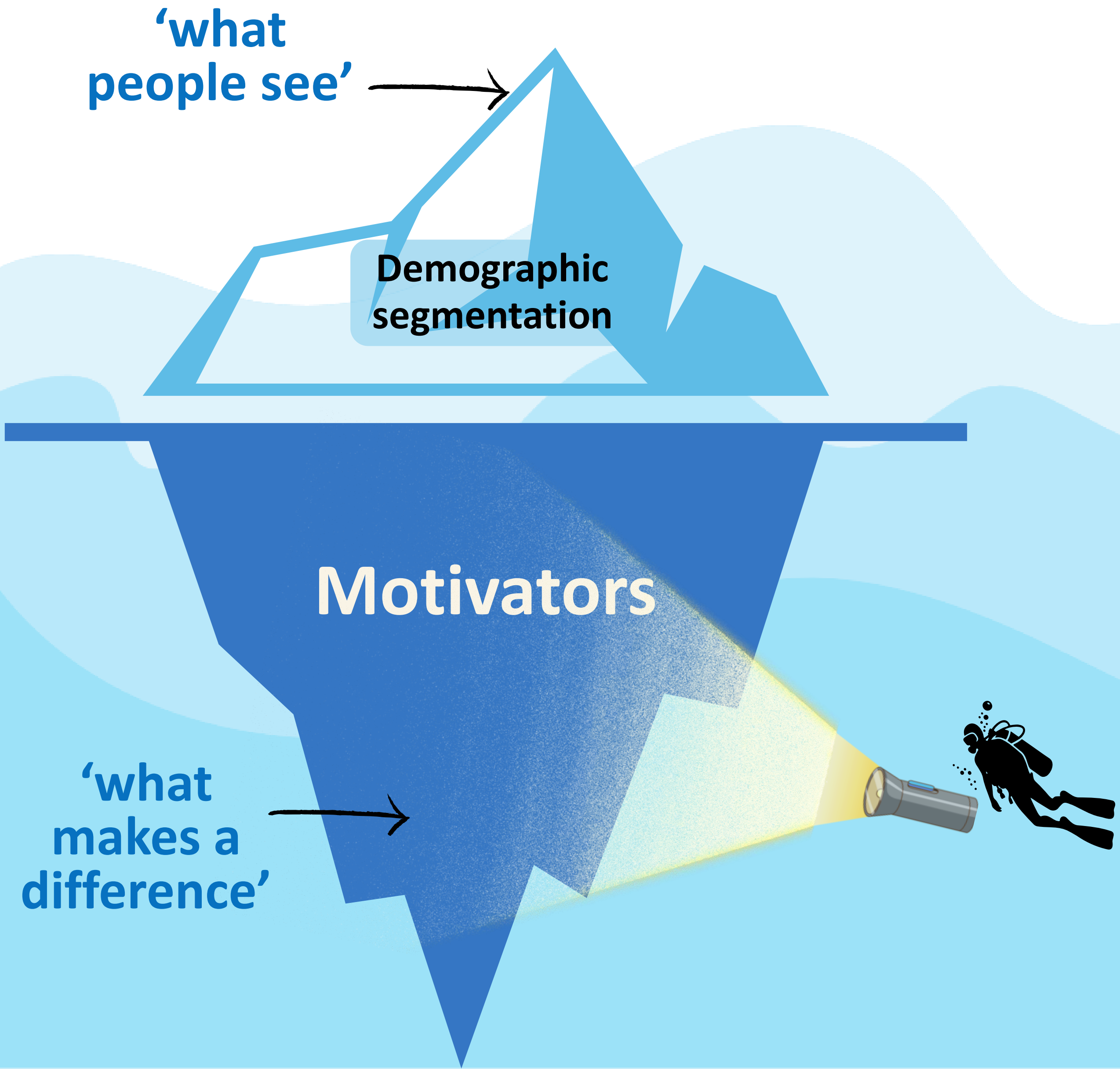
What's beneath the surface of grid-edge adoption?



Lasting adoption isn't achieved through surface-level understanding alone.

Success depends on uncovering the deeper motivations.

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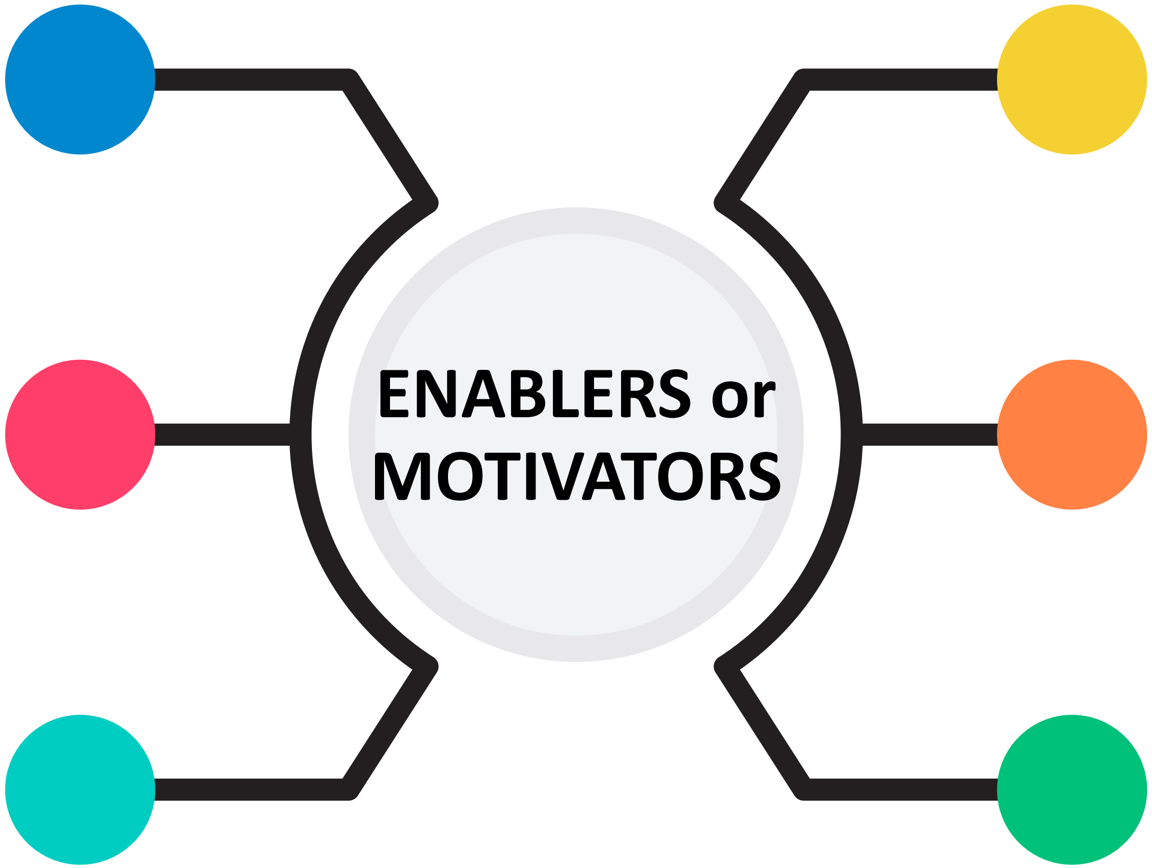
Customer Adoption: What drives it?

Insights from research on energy efficiency, demand response, DERs, and smart programs



Financial Savings / Incentives

Rebates, bill credits, clear ROI.

Environmental values

Sustainability, carbon reduction.

Convenience & Ease

“Set it and forget it”.
Make it simple.

Social Norms & Peer Influence

Neighbors, communities, comparisons, shared dashboards.

Personal Control & Insights

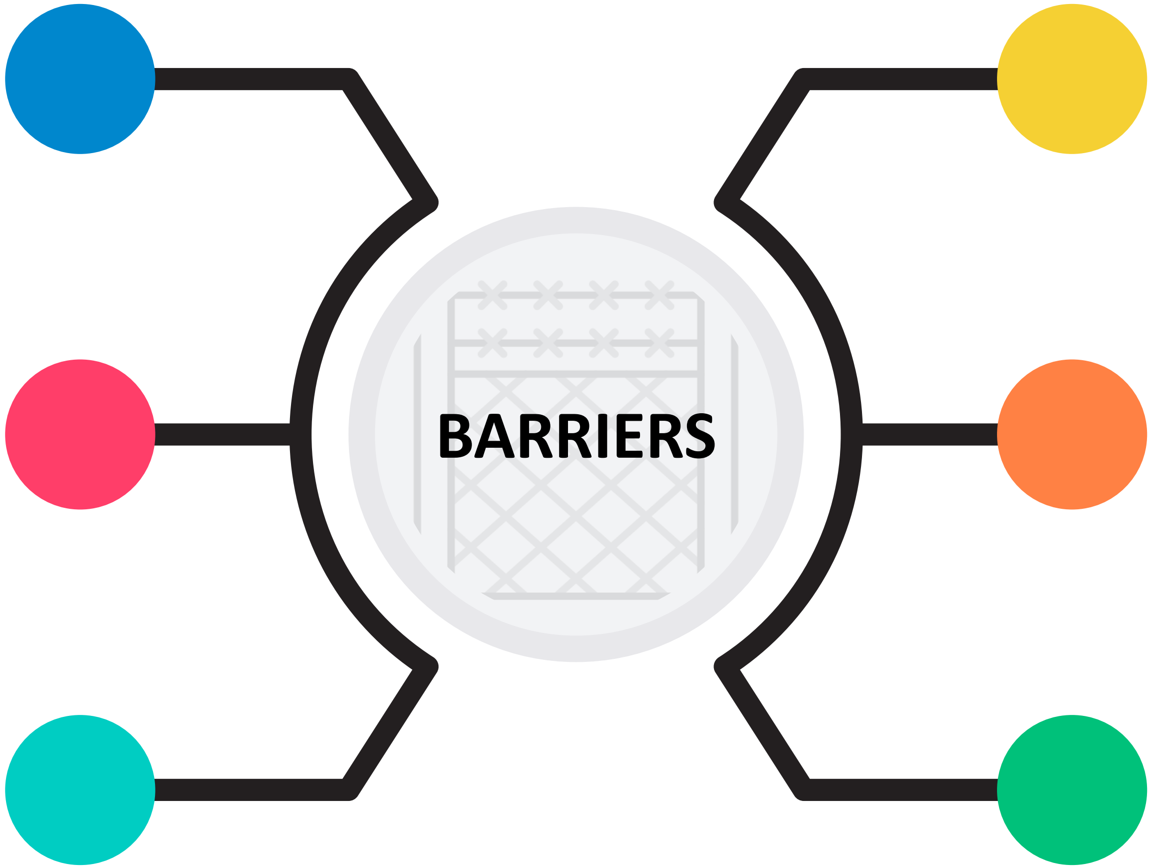
Real-time usage, transparency, apps.

Tech Enthusiasm

Enjoy trying new devices and innovations.

Customer Adoption: What stands in the way?

Insights from research on energy efficiency, demand response, DERs, and smart programs



Cost & Uncertainty

High upfront costs, unclear payback

Complexity

Too technical, too many steps

Status Quo Bias

Habit, procrastination, doing nothing

Distrust & Privacy Concerns

Data security, Big Brother fears

Low Awareness & Relevance

Don't know, doesn't fit lifestyle

Perceived Lack of Impact

"My actions don't matter," "savings too small"

Our Approach

By grouping customers based on their motivations, utilities can craft targeted messages that resonate with each segment. To support this, we:

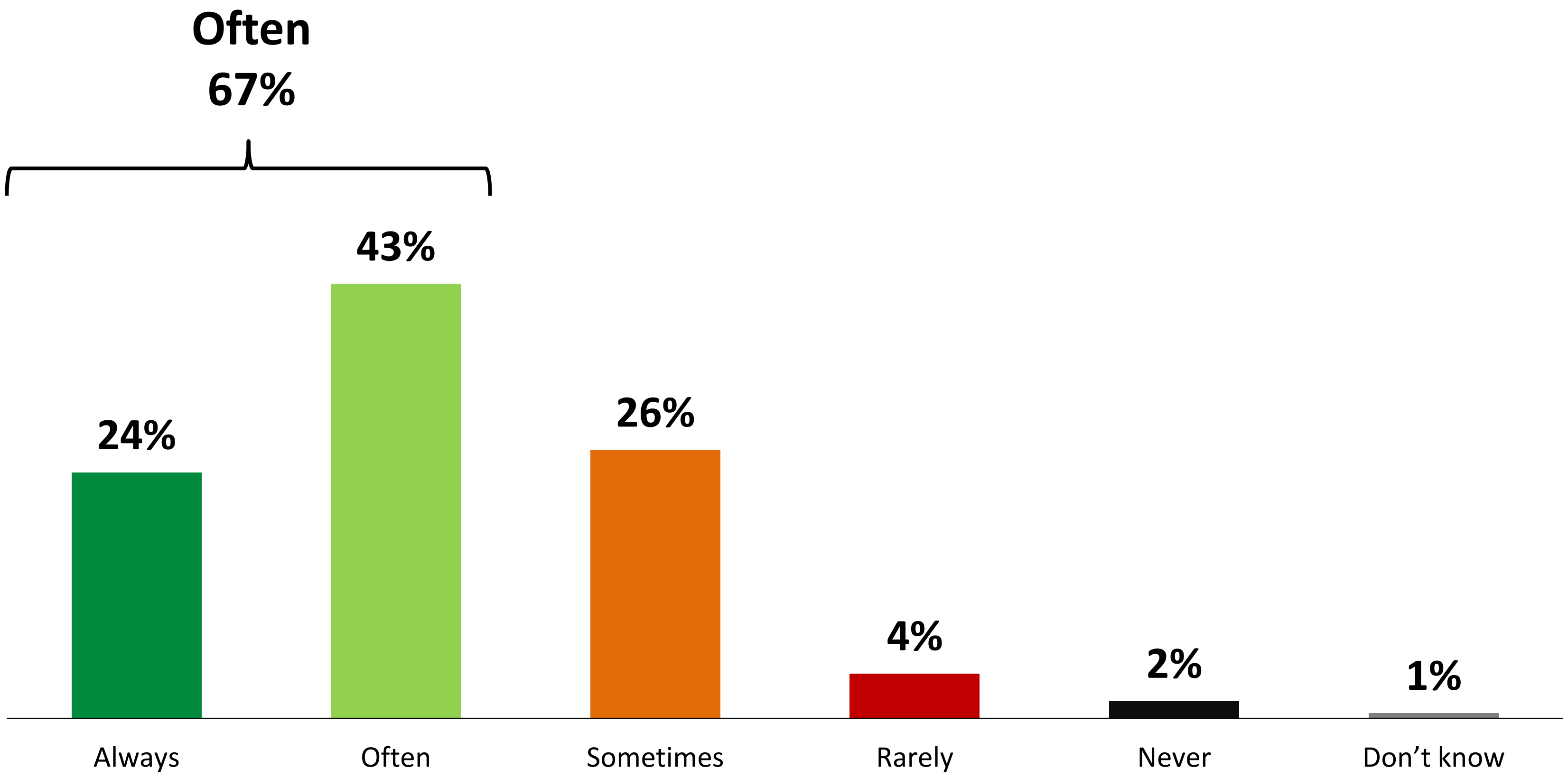
- Launched a comprehensive **55-question national online survey** of 2,079 customers between Sept 9th and 14th
- Tested reactions to a realistic program scenario: **Smart Thermostat Rewards Program**
- Gathered additional insights on household energy use and past energy-saving behaviours
- Assessed motivations through 22 neutrally worded statements **across six key areas:** environment, cost, technology, trust, control, and convenience

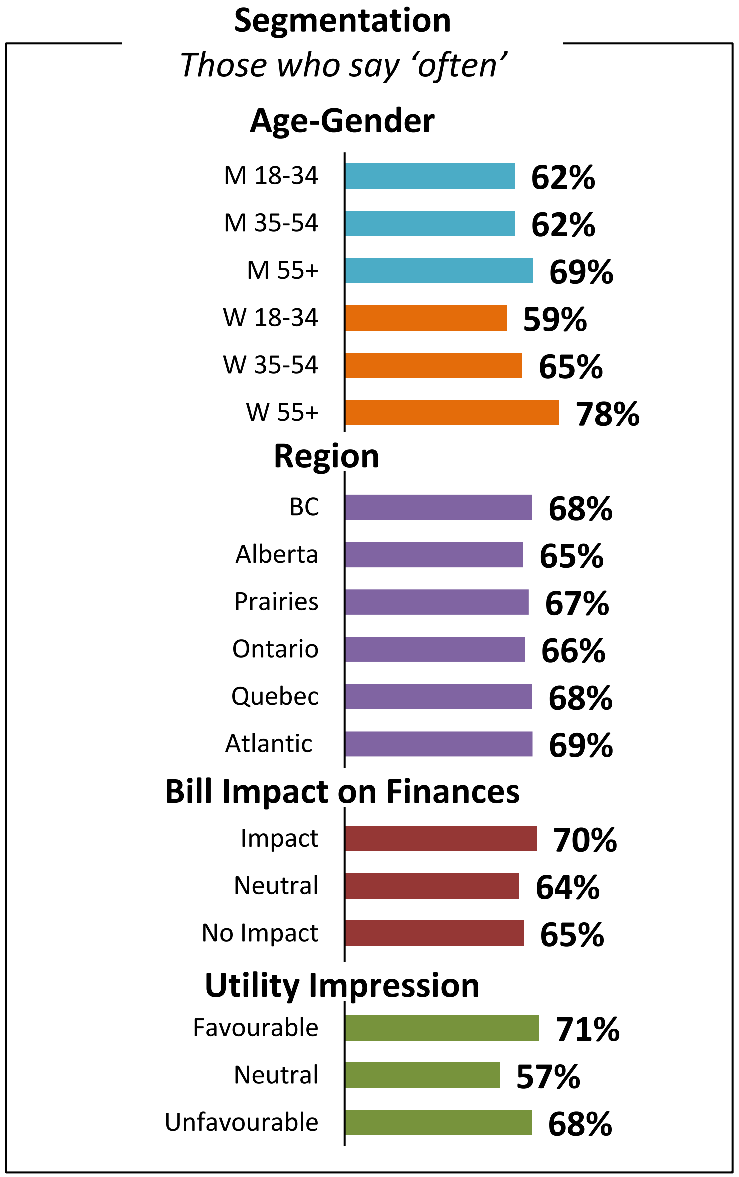
Setting the Stage

Daily Energy Use Reduction:

2-in-3 Canadians often take steps to reduce energy usage in daily life; highest among older women

Q How often do you take steps to reduce energy usage in daily life?
[asked of all respondents; n=2,000]

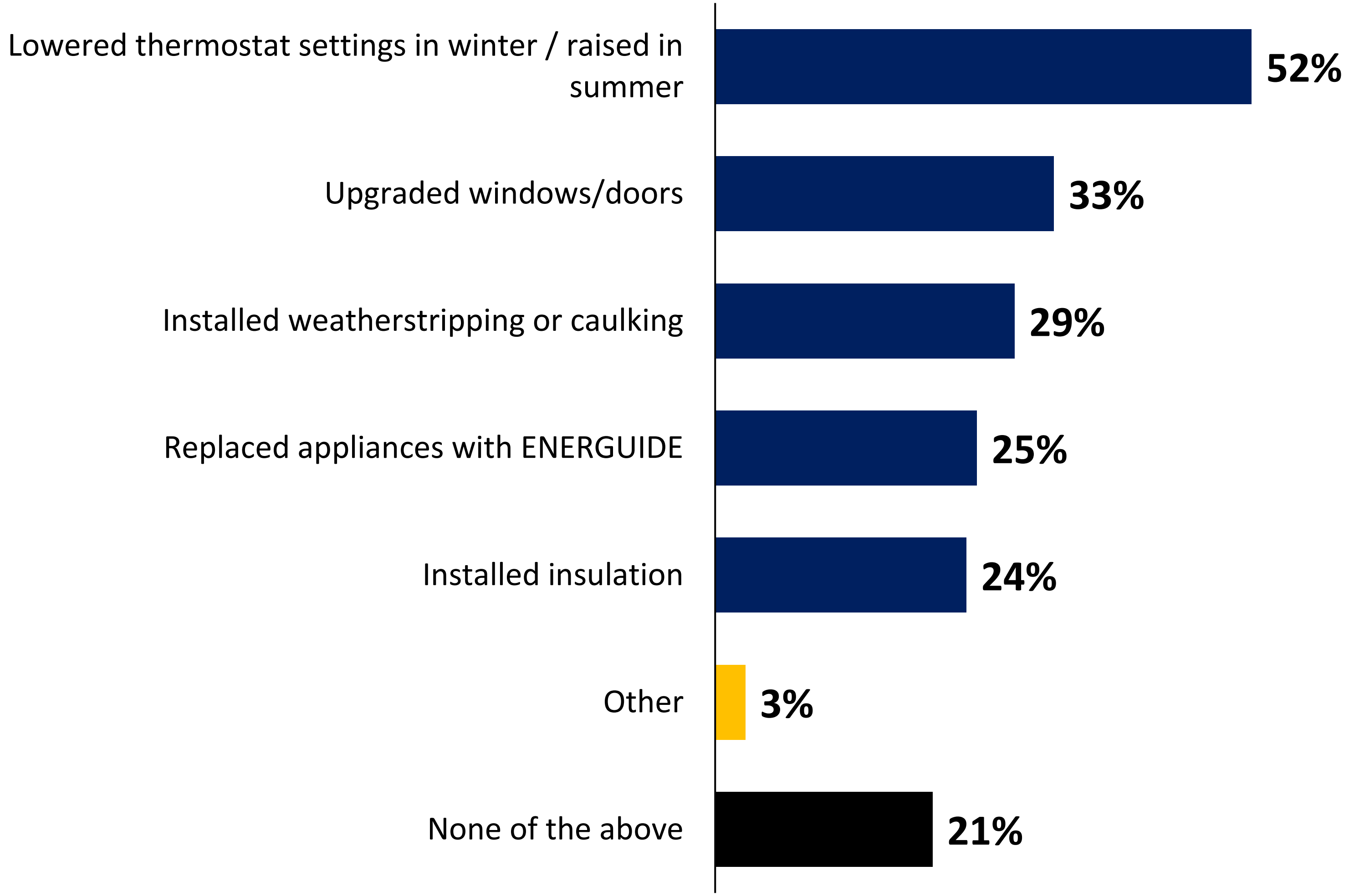


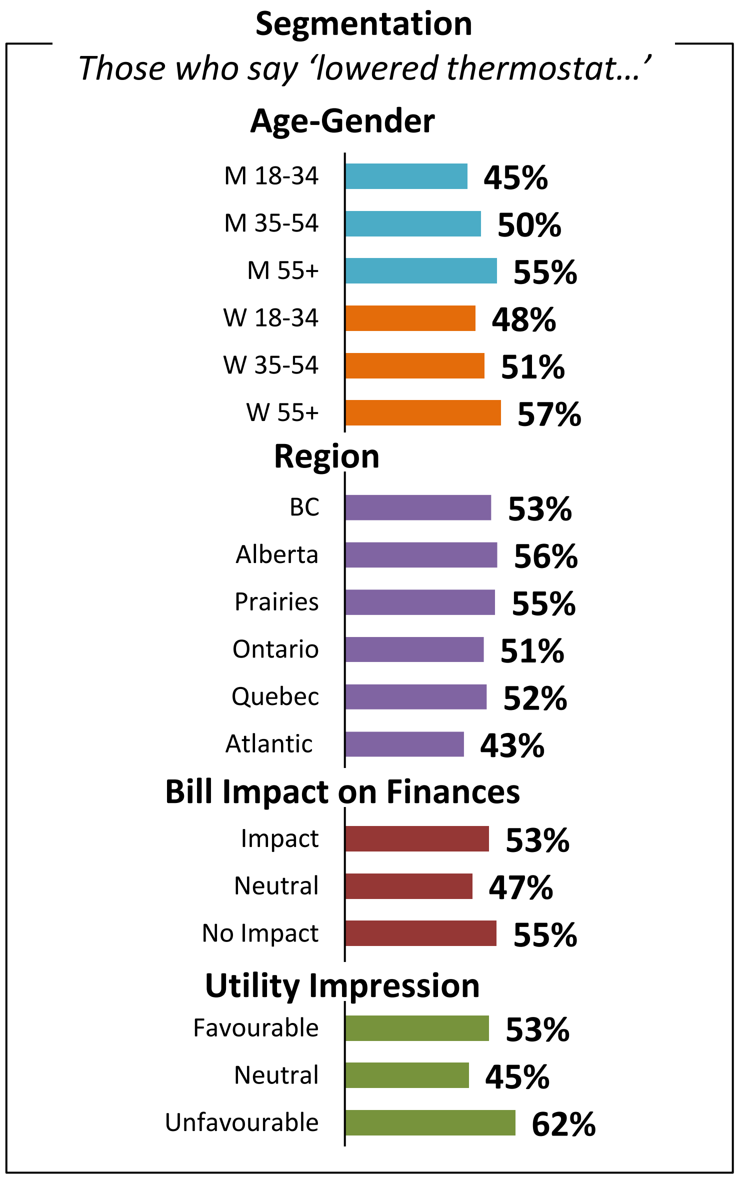


Energy Saving:

Thermostat adjustments lead as energy-saving method

Q Have you completed any of the following to reduce household energy use?
[asked of all respondents; n=2,000]





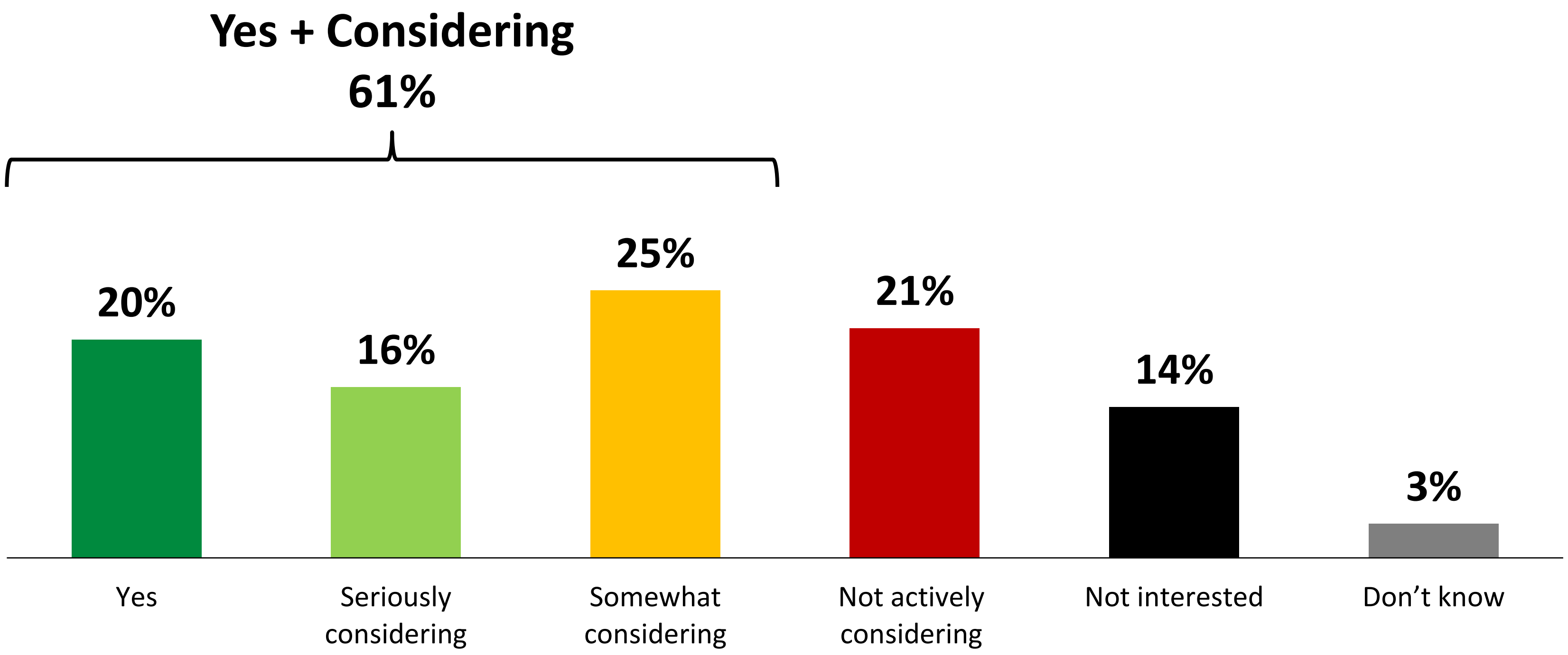
Note: Multiple mentions allowed; totals may exceed 100%.

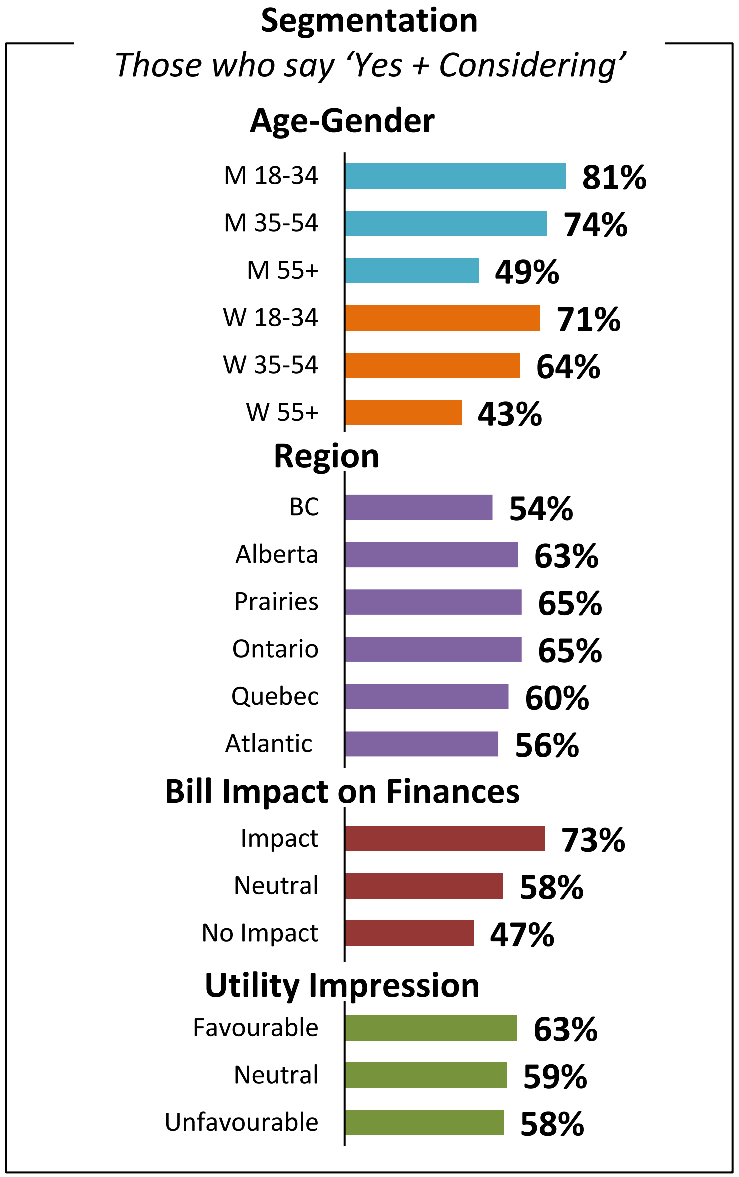
Smart Devices:

61% use or are considering smart home devices; higher w/ younger Cdn. and those impacted by their bill

Q Do you use **smart home devices** that help you manage and reduce your energy use? (e.g., smart plugs, timers, Wi-Fi–enabled appliances)

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



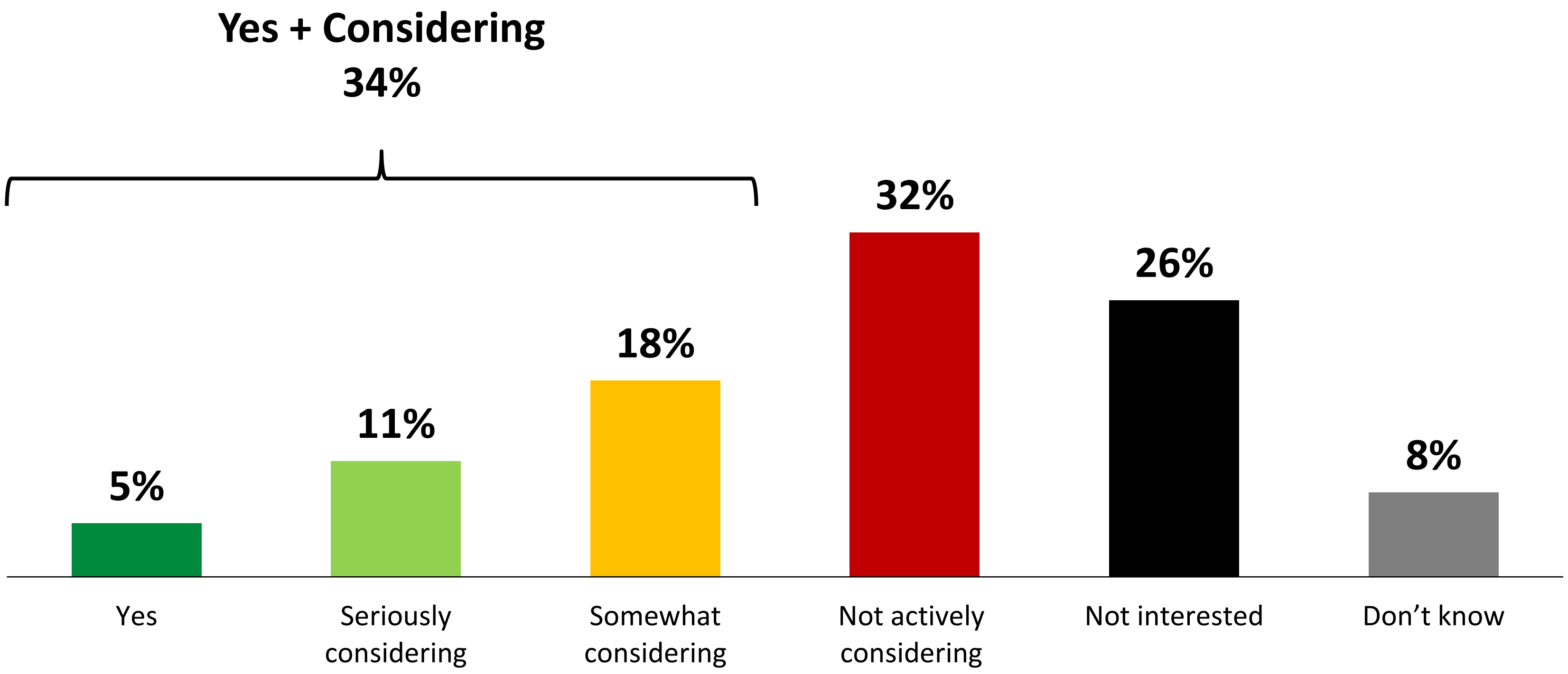


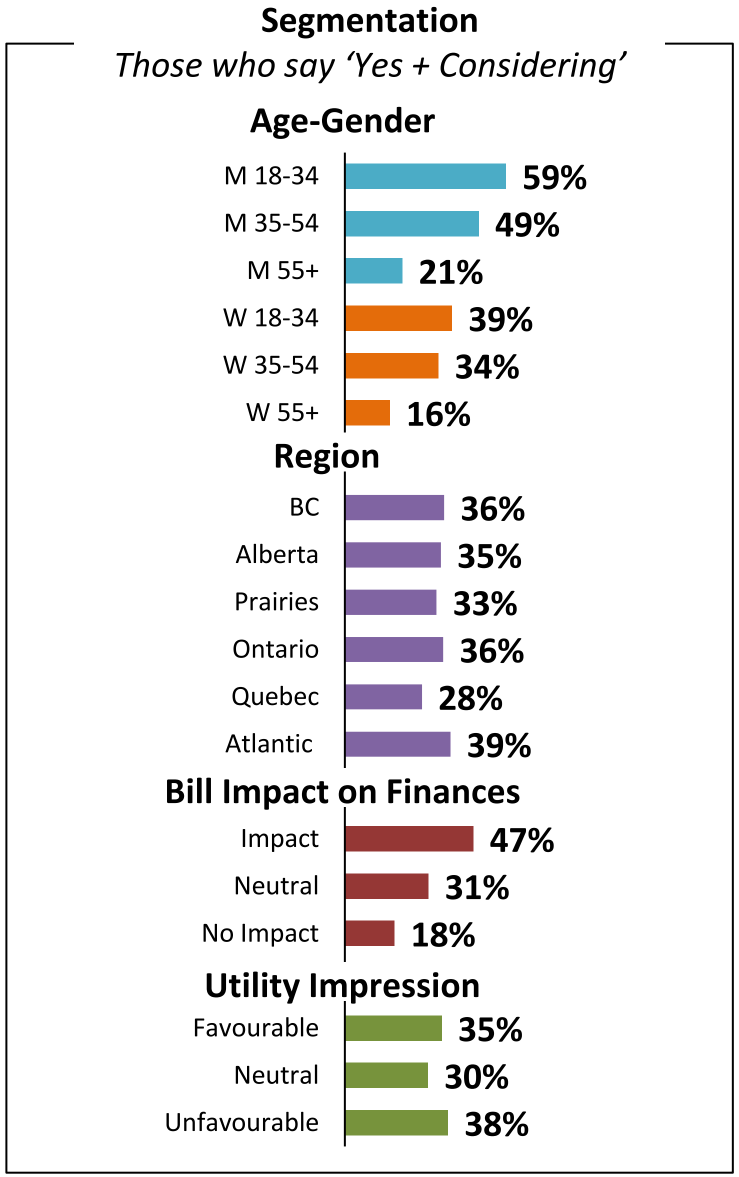
Clean Energy Systems:

While 5% claim to already have panels or storage at home, 29% are considering clean energy systems

Q Do you, or the owner of your home, have any of the following installed at your home: **solar panels; wind turbine; battery storage**?

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





Program Scenario Testing

Demand Management Scenario

Imagine your utility offered a program called the **Smart Thermostat Rewards Program**.

Whether you own or rent, your utility would provide you with a smart thermostat. The thermostat would make **small, temporary temperature adjustments** on hot summer days or cold winter days when electricity demand is highest. These events would usually last **from a few minutes up to a couple of hours**. You could **override the adjustment at any time** if you prefer.

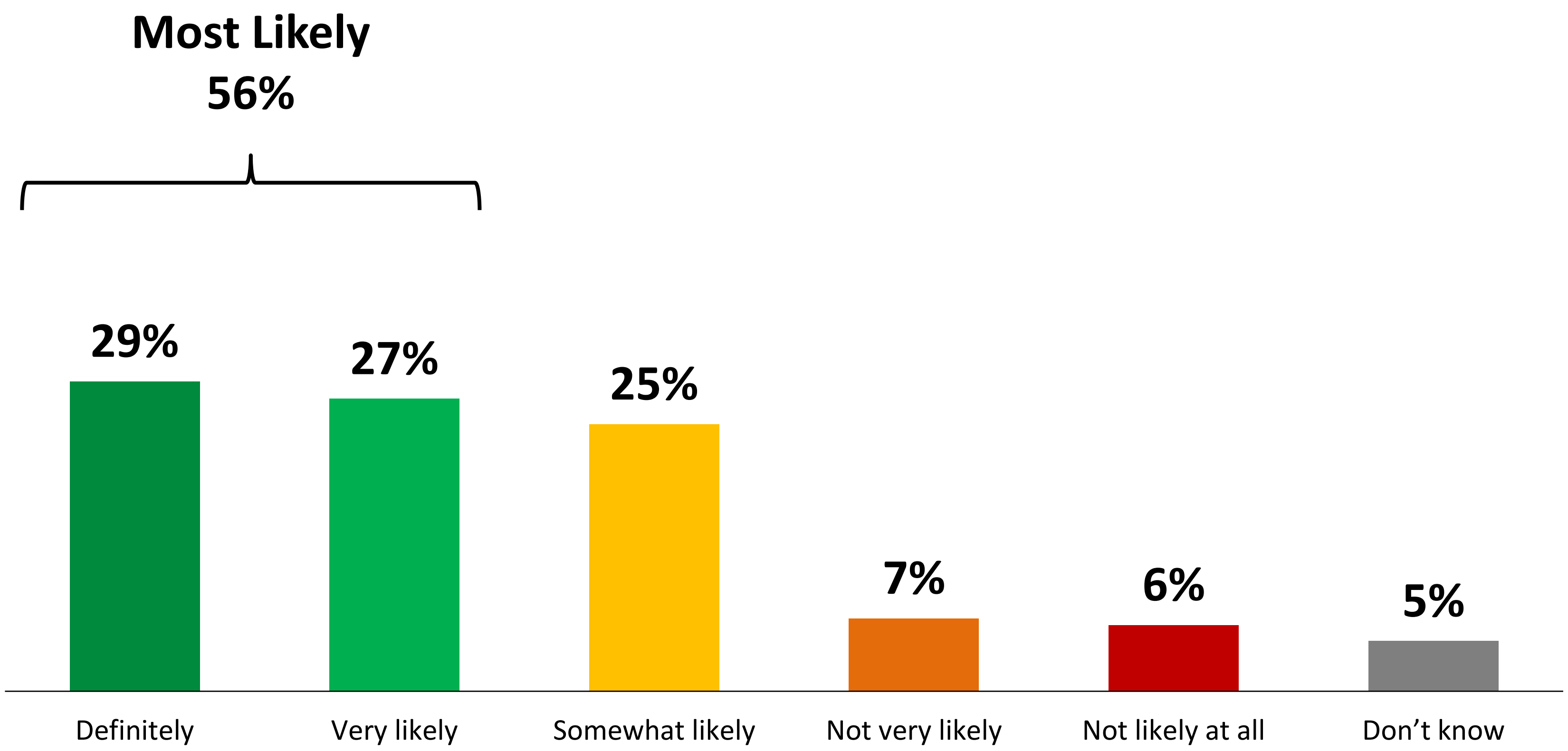
In return, participants receive:

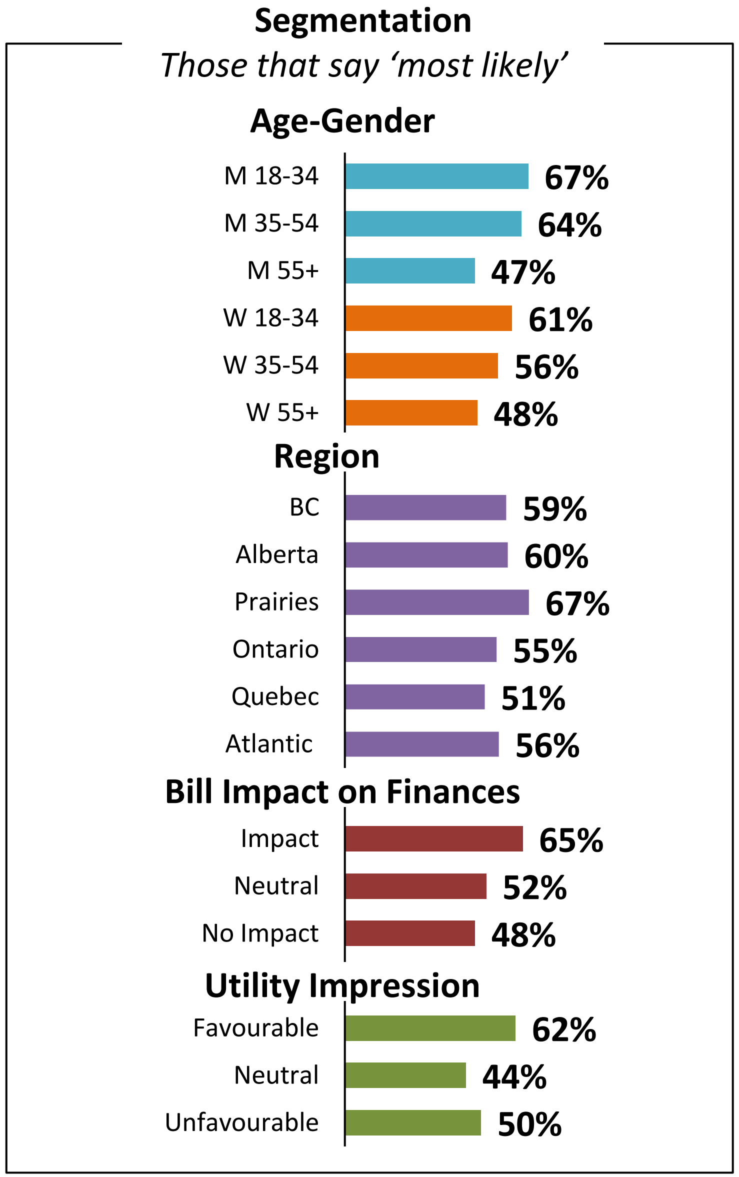
- **$75 when you enroll**
- **$20 each year you stay in the program**

Participation Likelihood:

A majority (56%) would participate; higher among younger respondents and those impacted by their bill

Q If this program were available to you, how likely would you be to participate?
[asked of all respondents; n=2,000]



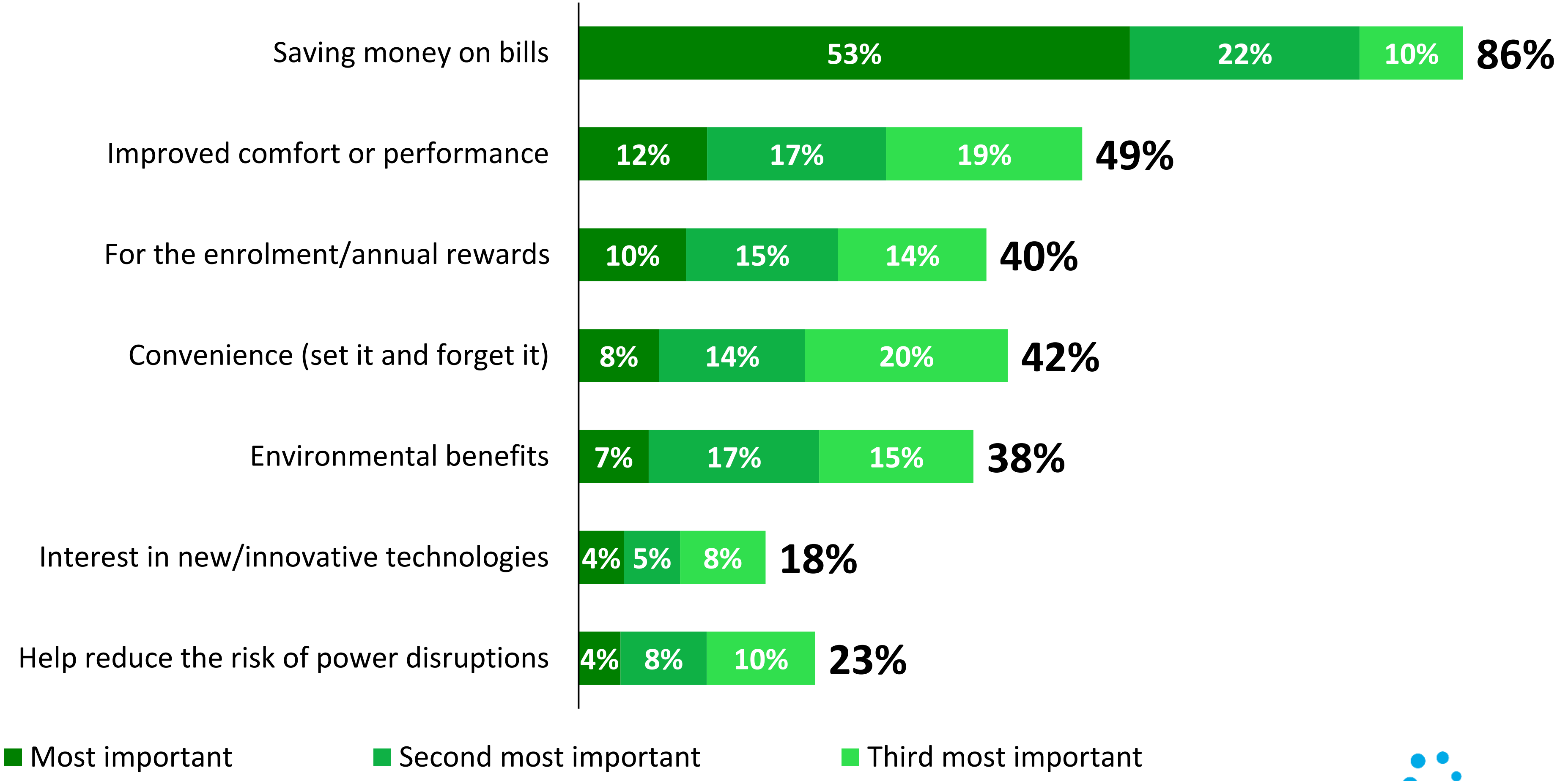


Note: 1% are already participating in a similar program.

Participation Reasoning:

‘Saving money on bills’ leads as the top reason with a 53% majority

Q What is the main reason you would participate in this program?
[asked of respondents definitely/very likely/somewhat likely to participate; n=1,621]



Note: ‘Other,’ ‘Not sure,’ and ‘Not asked’ (second and third reasons skipped when no first reason provided) responses each under 3% (not shown).

Participation Reasoning by Motivator Cluster: Skeptical Independents and Cautious Strugglers more likely to participate to save money

Q

What is the main reason you would participate in this program?

[asked of respondents likely to participate; n=1,621]

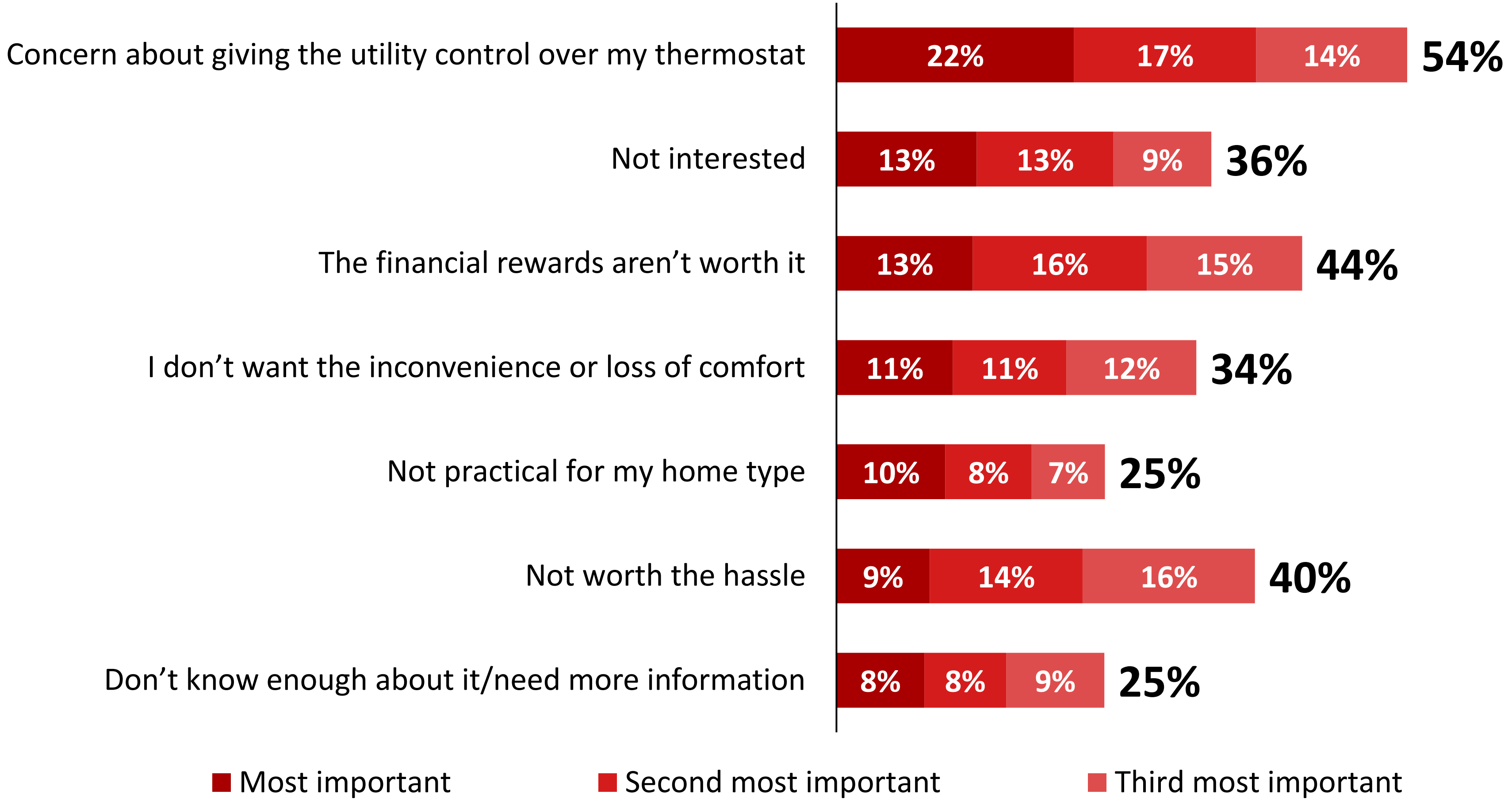
Top 1 Reason	Total	Eco-Tech Enthusiasts	Green Pragmatists	Ambivalent	Cautious Strugglers	Skeptical Independents
n-size	**1,621**	**317**	**362**	**448**	**243**	**251**
Saving money on bills	**53%**	52%	47%	52%	58%	63%
Improved comfort or performance	**12%**	15%	14%	13%	10%	8%
For the rewards	**10%**	7%	8%	10%	12%	16%
Convenience	**8%**	7%	9%	9%	4%	8%
Environmental benefits	**7%**	8%	8%	7%	8%	2%
Interest in new technologies	**4%**	4%	9%	4%	3%	0%
Help reduce the risk of power disruptions	**4%**	5%	5%	4%	3%	2%

Note: ‘Other’ and ‘Not sure’ responses each under 3% (not shown).

Non-participation Reasoning:

Concern about giving control over thermostat is the top barrier to participation

Q What is the main reason that would hold you back from enrolling in this smart thermostat program?
[asked of respondents not likely to participate; n=259]



Note: ‘Other’ (12%, 7%, 5%), ‘Not sure’ (1%, 4%, 6%), and ‘Not asked’ (second and third reasons skipped when no first reason provided ; 1%, 5%) responses not shown.

Non-participation Reasoning by Motivator Cluster: Skeptical Independents most likely to be concerned about utility control (32%)

Q What is the main reason that would hold you back from enrolling in this smart thermostat program?
[asked of respondents not likely to participate; n=259]

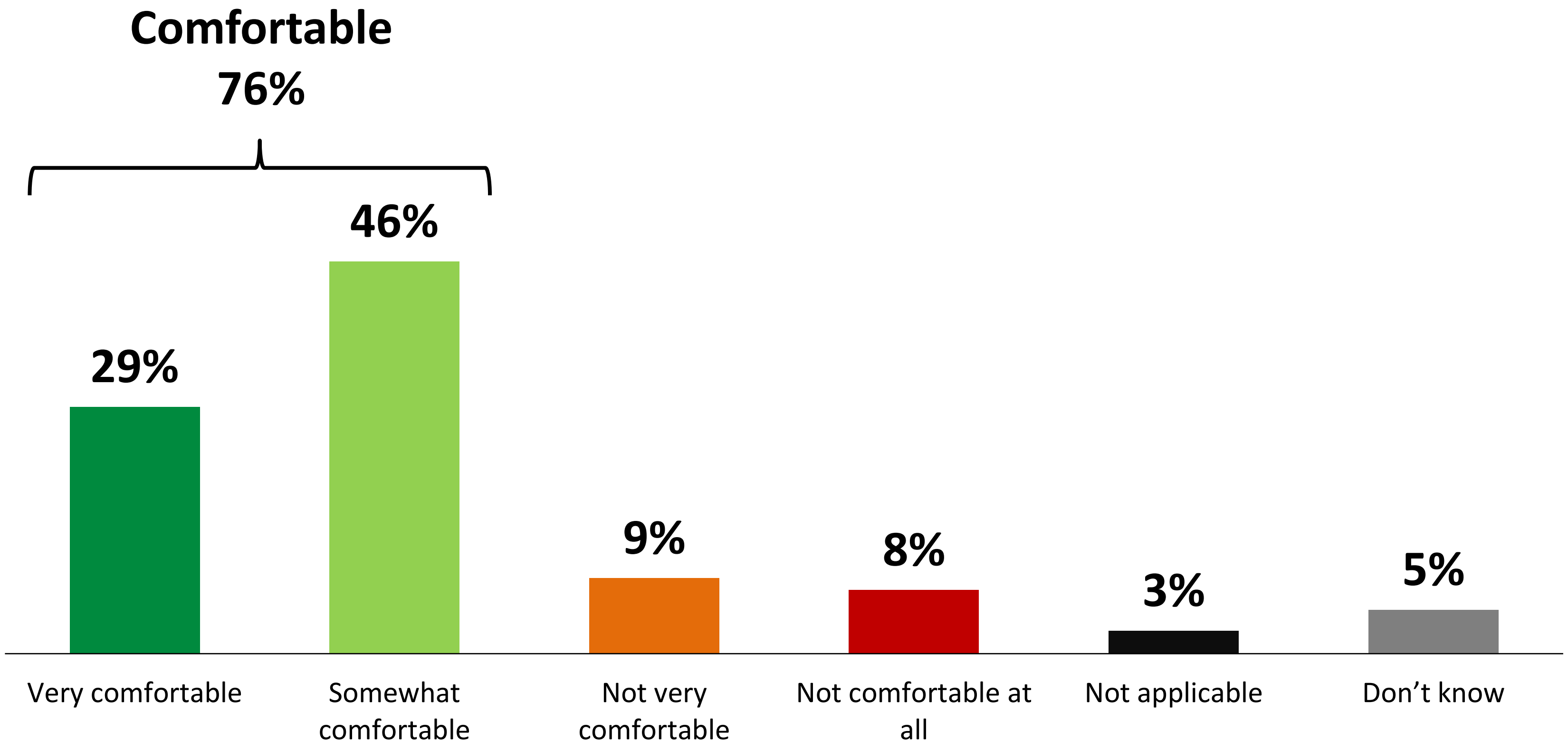
Top 1 Reason	Total	Green Pragmatists	Cautious Strugglers	Ambivalent	Skeptical Independents
n-size	259	28	48	57	115
Concern about giving the utility control over my thermostat	22%	4%	25%	14%	32%
Not interested	13%	10%	11%	20%	12%
The financial rewards aren't worth it	13%	3%	13%	14%	13%
I don't want the inconvenience or loss of comfort	11%	21%	12%	14%	6%
Not practical for my home type (e.g., rental, condo, older building)	10%	8%	3%	10%	14%
Not worth the hassle	9%	17%	5%	12%	7%
Don't know enough about it/need more information	8%	15%	14%	8%	4%

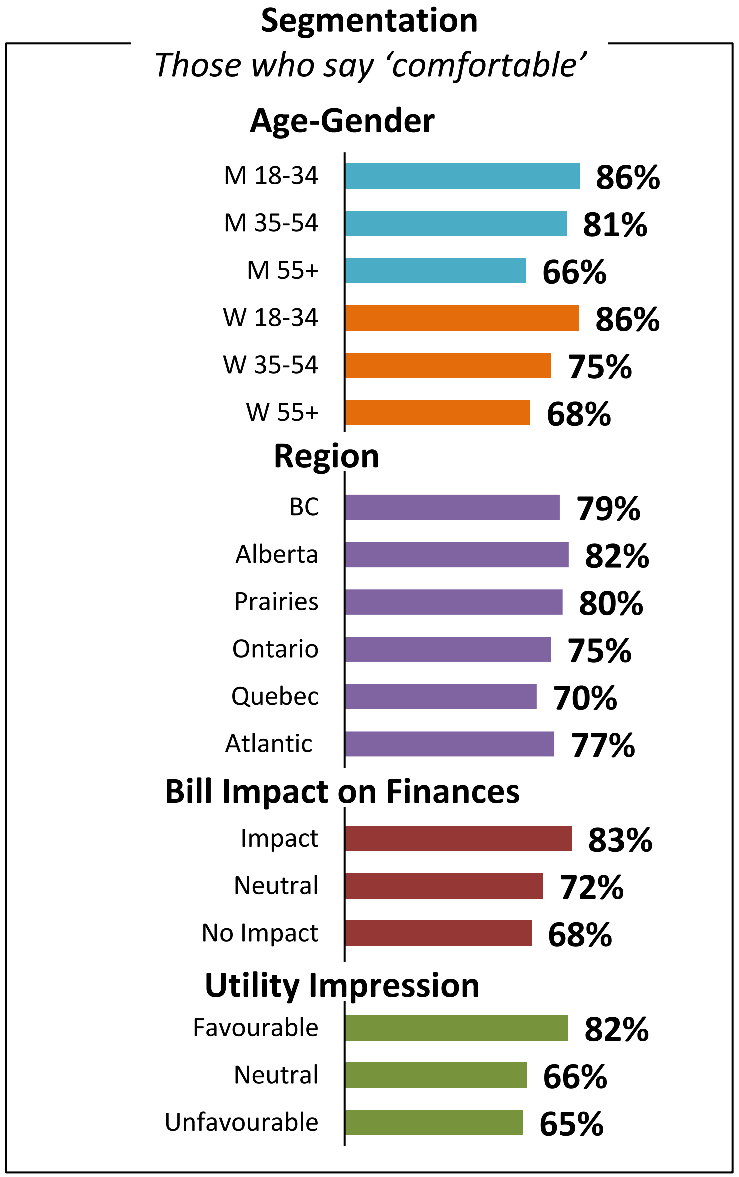
Note: 'Other' (12%) and 'Not sure' (1%) responses not shown. Eco-Tech Enthusiasts cluster not included due to small n (n=11).

Utility Control Comfortability:

Majority (76%) are comfortable with utility thermostat adjustments; highest among younger respondents

Q How comfortable would you feel with your utility making these small, temporary thermostat adjustments during peak periods (e.g. hot summer days)?
[asked of all respondents; n=2,000]





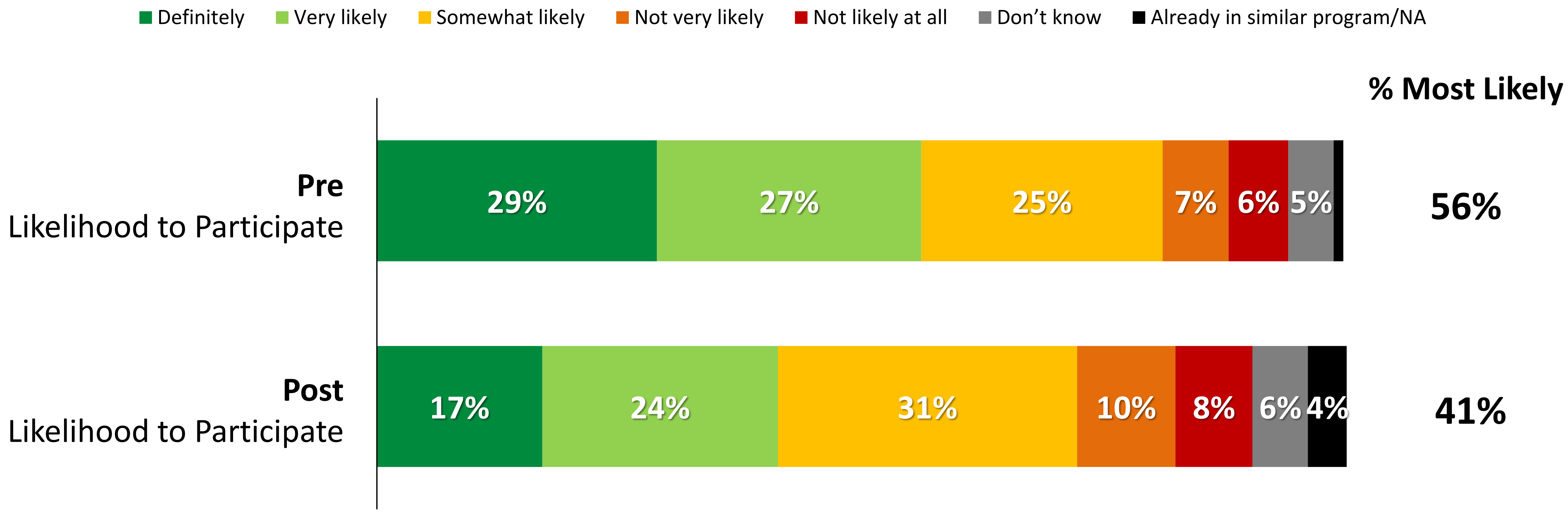
Pre-post difference in participation:

Percentage of those most likely to participate drops 15pts after being primed with inconveniences

Q **[Pre]** If this program were available to you, how likely would you be to participate?

[Post] If this program sometimes caused small inconveniences (e.g., your air conditioning cycles off for 15 minutes during a hot day), how likely would you still be to participate?

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

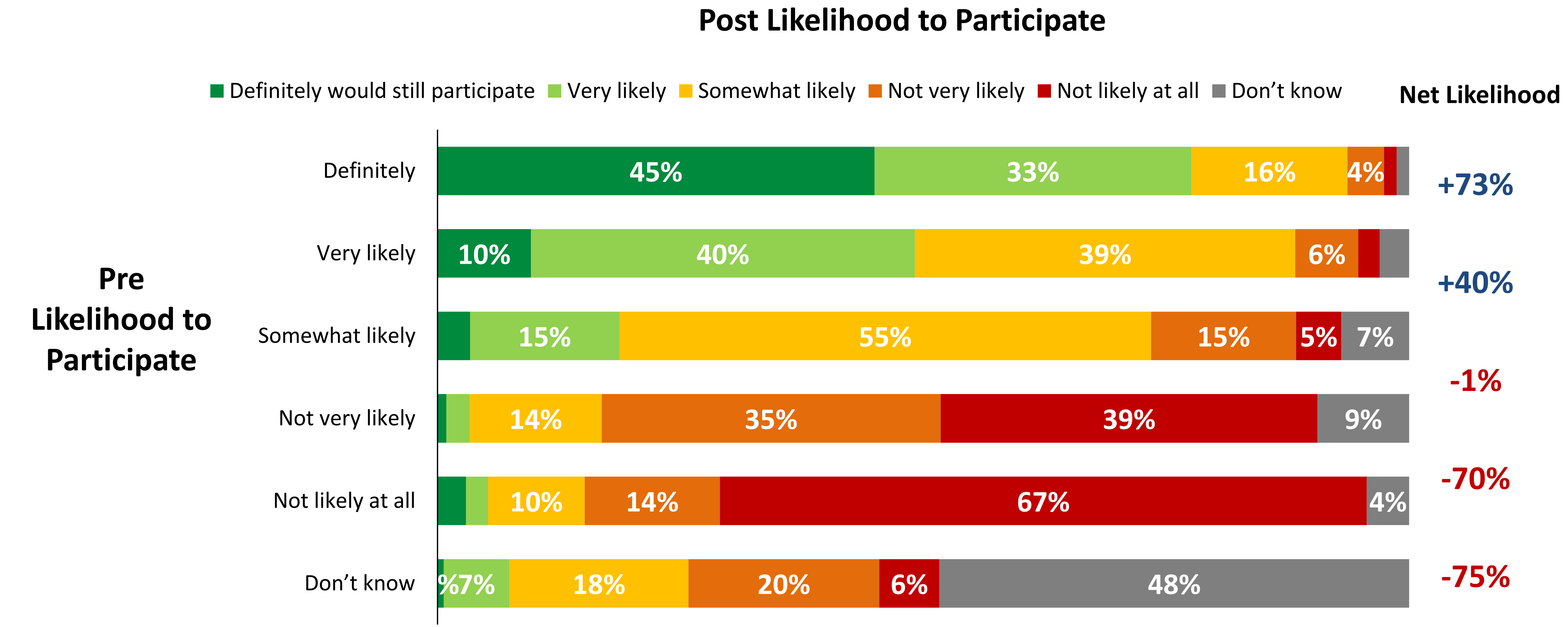


Willingness BY Enrolment:

Net likelihood to participate despite inconveniences only +40% among those who initially said 'very likely'

Q If this program sometimes caused small inconveniences (e.g., your air conditioning cycles off for 15 minutes during a hot day), how likely would you still be to participate? **(BY Pre Likelihood to Participate)**

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



Note: % were rebased to exclude 'Not Applicable' (4%). "Don't know" (5%) and "Already participating in a similar program" (1%) for pre likelihood to participate not shown.

Motivators and Barriers

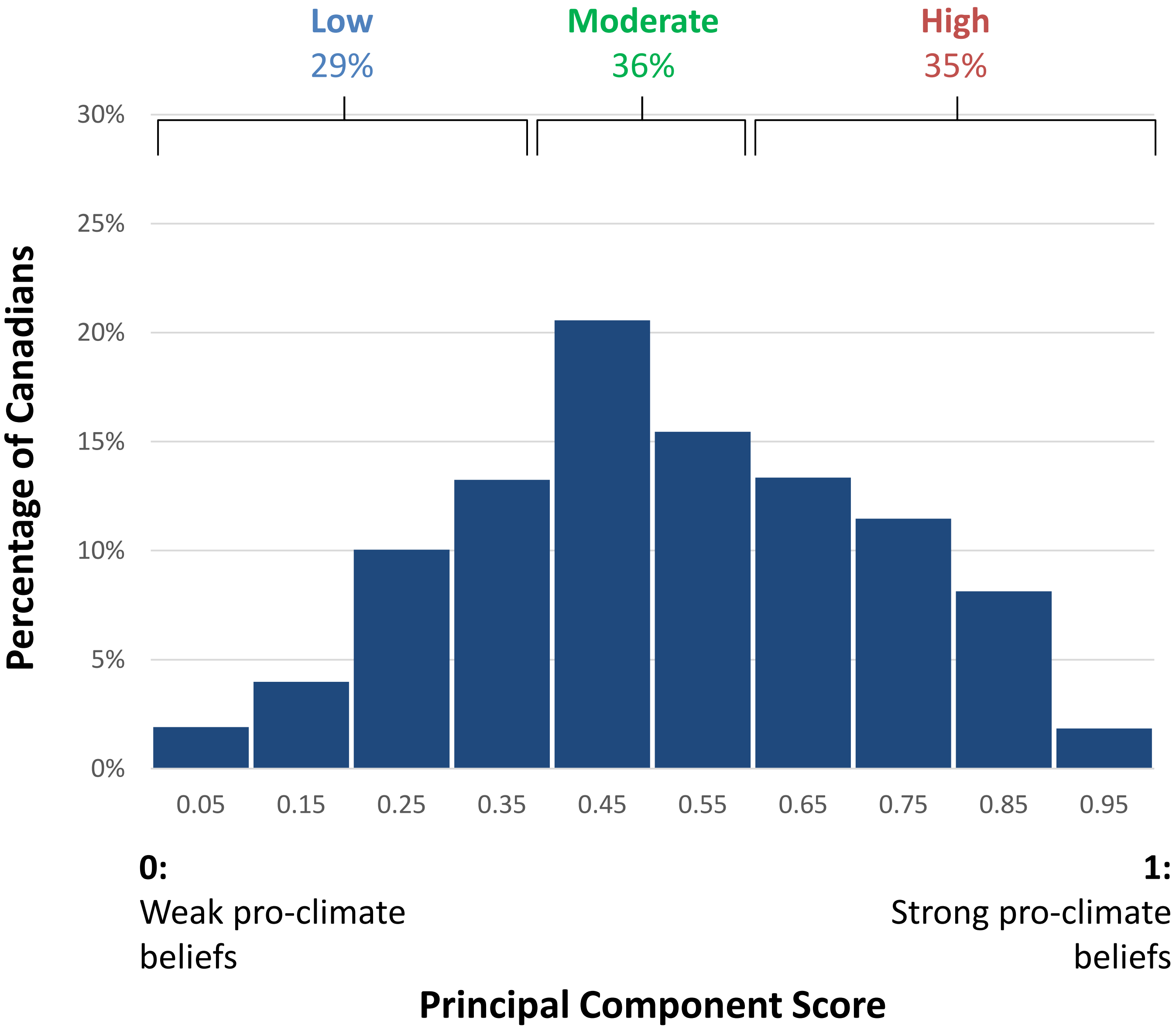
Underling Dimensions

Our analysis indicates that the 22 motivational items we included in our model boiled down to ten underlying dimensions.

- Climate Behaviors
- Climate Beliefs
- Future Value Focus
- Value Seeking
- Tech Adoption
- Tech Comfort
- Big Brother Concerns
- Convenience
- Institutional Trust
- Deference

Climate Beliefs:

Canadians tend to cluster around moderate pro-climate beliefs



Climate Beliefs Dimension

This dimension is based on how strongly people agree with two statements*:

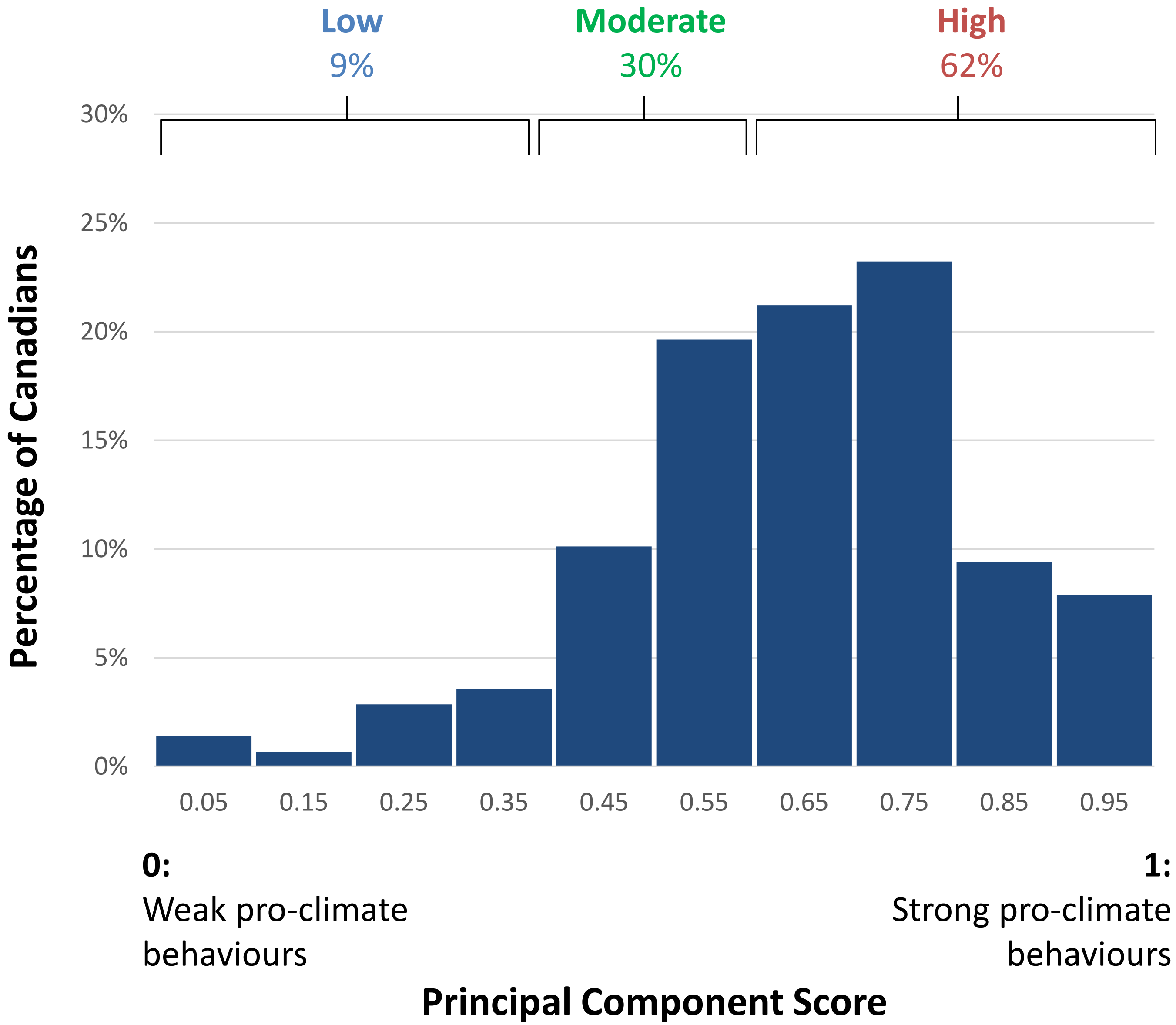
- *"People sometimes exaggerate the negative impact that human progress has on the environment"*[Reverse-coded] and
- *"There's not much I can personally do to make a difference for the environment."* [Reverse-coded]

Those with a score of at least 0.4 are labelled **Low**, those with a score above 0.6 are labelled **High**, and those in the middle are labelled as **Moderate**.

* **Note**: Four variables were included in the PCA, but we report the two variables that contribute the most to the PC here.

Climate Behaviours:

Canadians tend to cluster around stronger pro-climate behaviours



Climate Behaviours Dimension

This dimension is based on how strongly people agree with two statements*:

- *"I am willing to make changes in my lifestyle if it helps protect the environment"* and
- *"I try to do the right thing for the environment, even if it costs me extra money or time."*

Those with a score of at least 0.4 are labelled **Low**, those with a score above 0.6 are labelled **High**, and those in the middle are labelled as **Moderate**.

* **Note**: Four variables were included in the PCA, but we report the two variables that contribute the most to the PC here.

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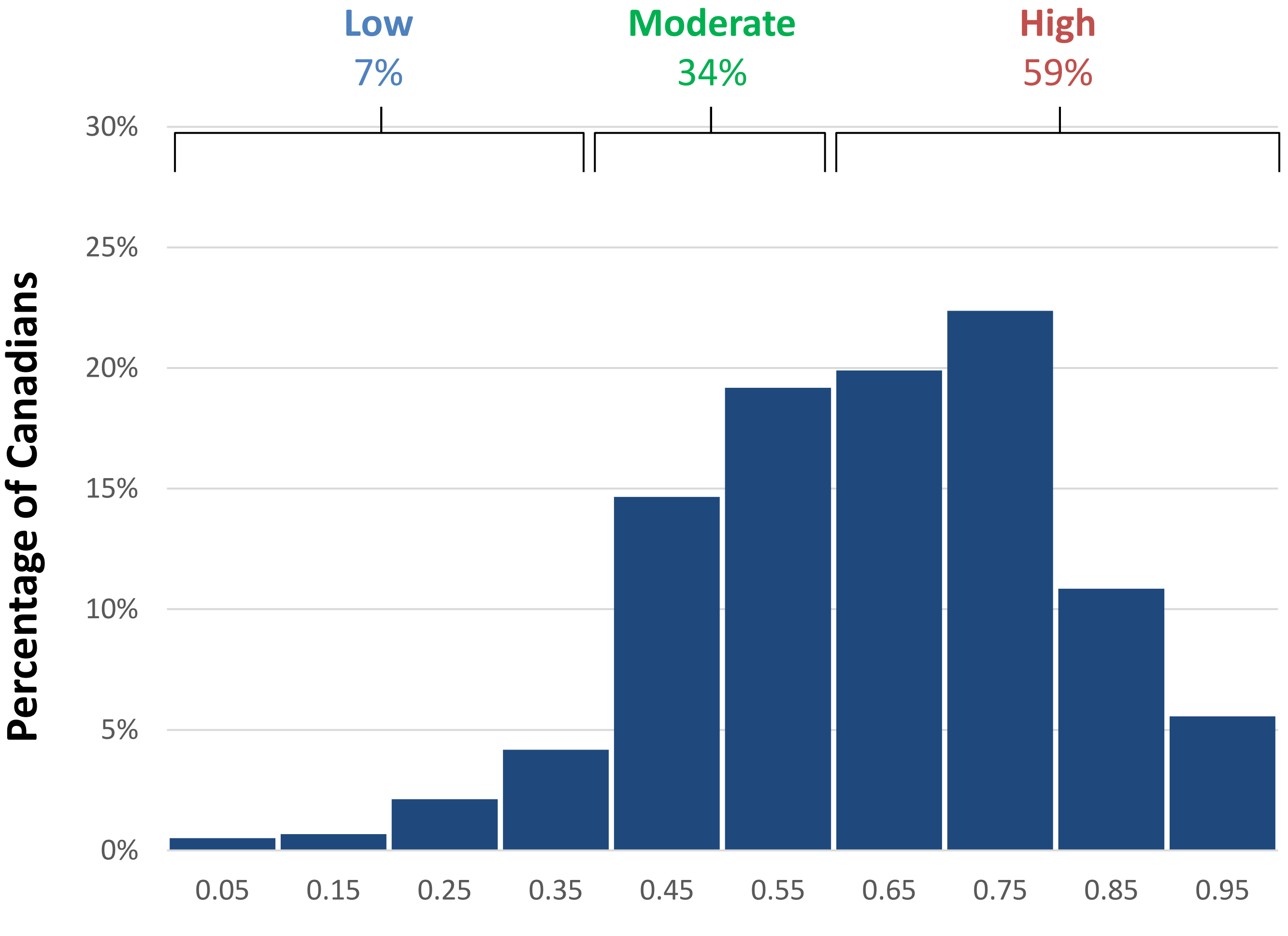
Future Value Focus:

Canadians interested in long-term value



0:
Weak future value focus

1:
Strong future value focus

Principal Component Score

Future Value Focus Dimension

This dimension is based on how strongly people agree with two statements*:

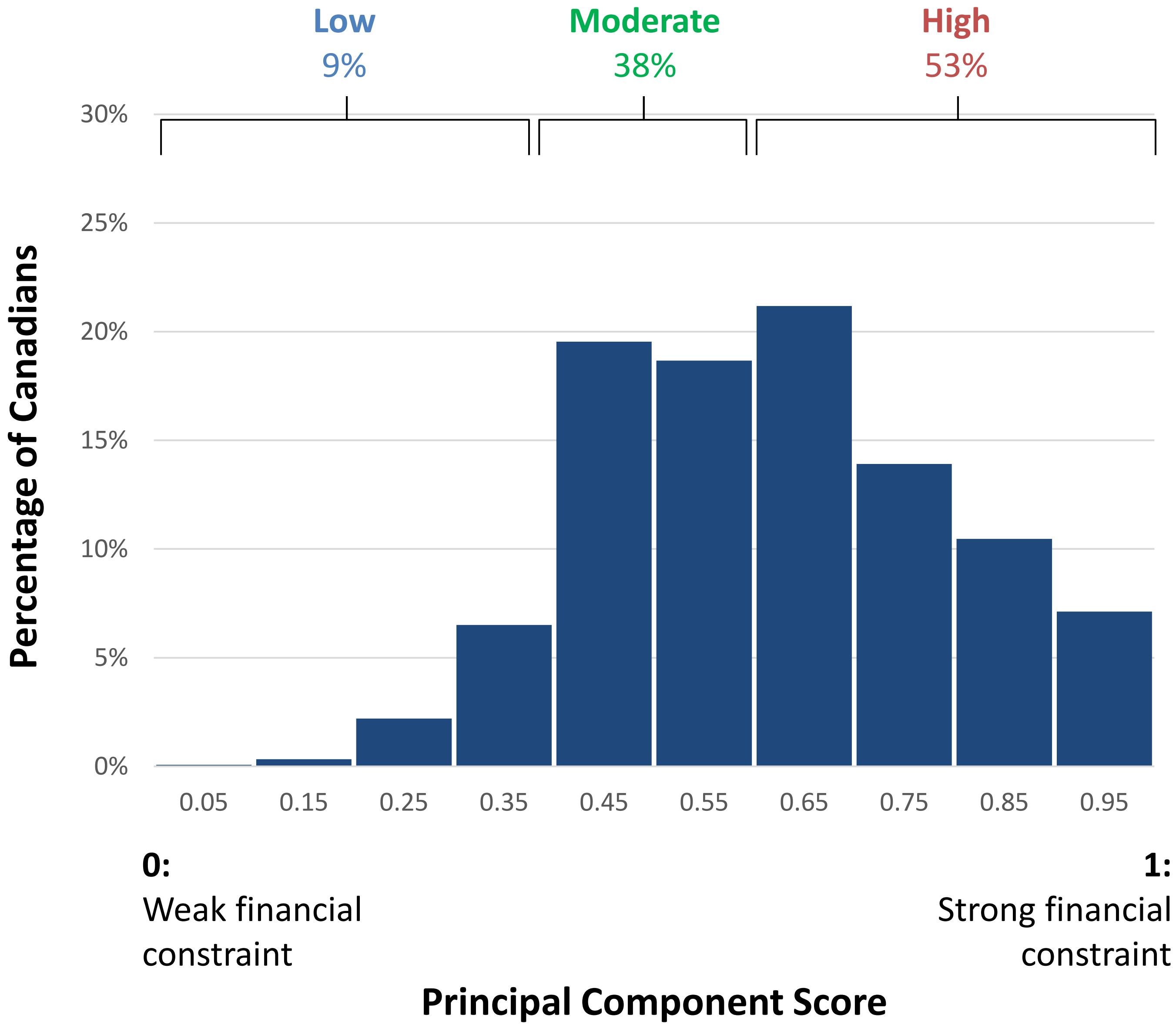
- *"I am willing to invest more upfront in products or services that will save me money in the long run"* and
- *"I usually choose the option that offers the best solution for my household, even if it isn't the cheapest."*

Those with a score of at least 0.4 are labelled **Low**, those with a score above 0.6 are labelled **High**, and those in the middle are labelled as **Moderate**.

* **Note**: Four variables were included in the PCA, but we report the two variables that contribute the most to the PC here.

Value Seeking:

Canadians tend to look for value



Financial Constraint Dimension

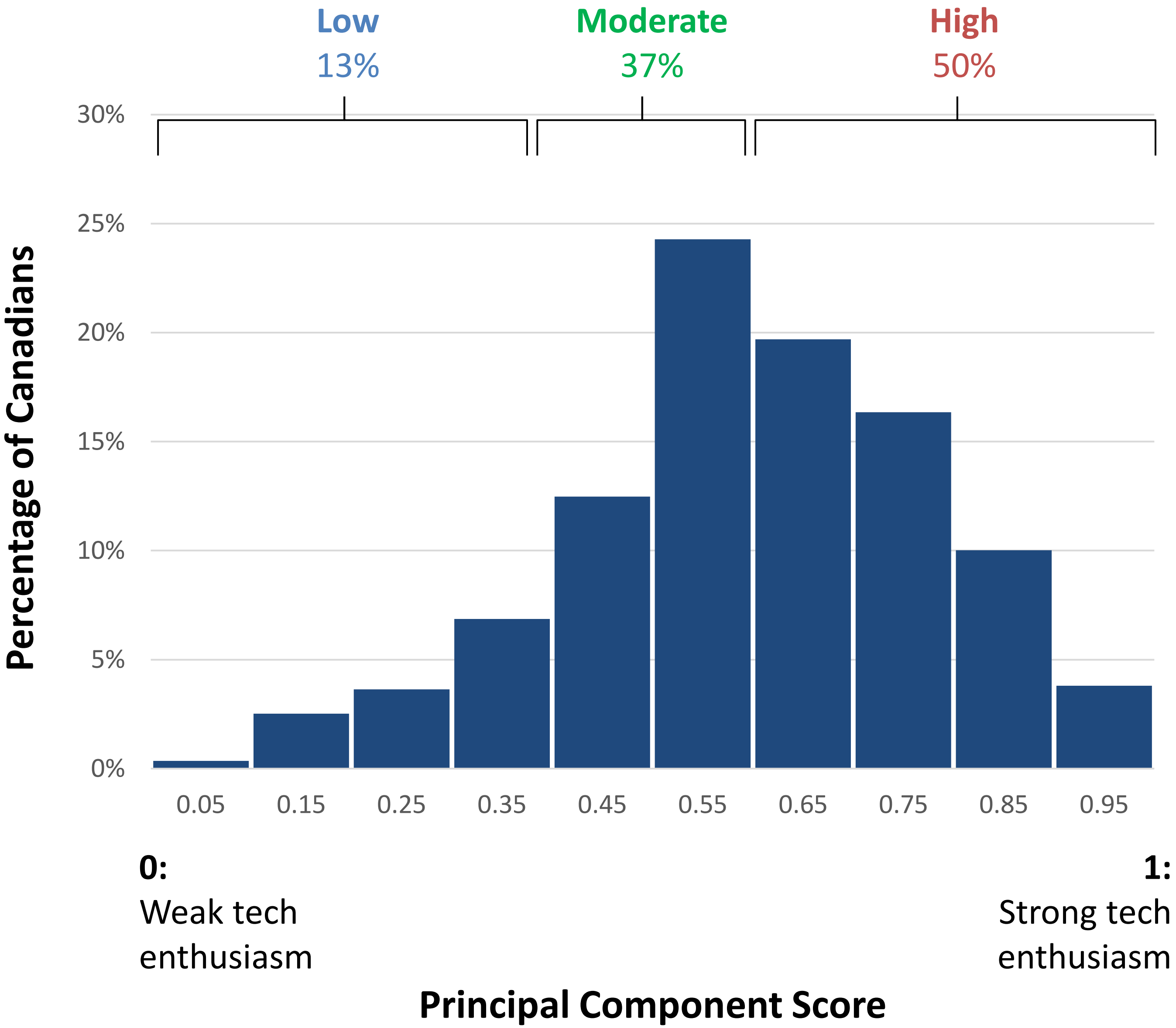
This dimension is based on how strongly people agree with two statements*:

- *"I don't spend much time comparing costs across different options for household expenses"* [Reverse-coded] and
- *"I always make sure I am getting the best value for my money on recurring costs (e.g., phone, internet, utilities)."*

Those with a score of at least 0.4 are labelled **Low**, those with a score above 0.6 are labelled **High**, and those in the middle are labelled as **Moderate**.

* **Note**: Four variables were included in the PCA, but we report the two variables that contribute the most to the PC here.

Tech Comfort:
Most Canadians are comfortable using technology



Tech Enthusiasm Dimension

This dimension is based on how strongly people agree with two statements*:

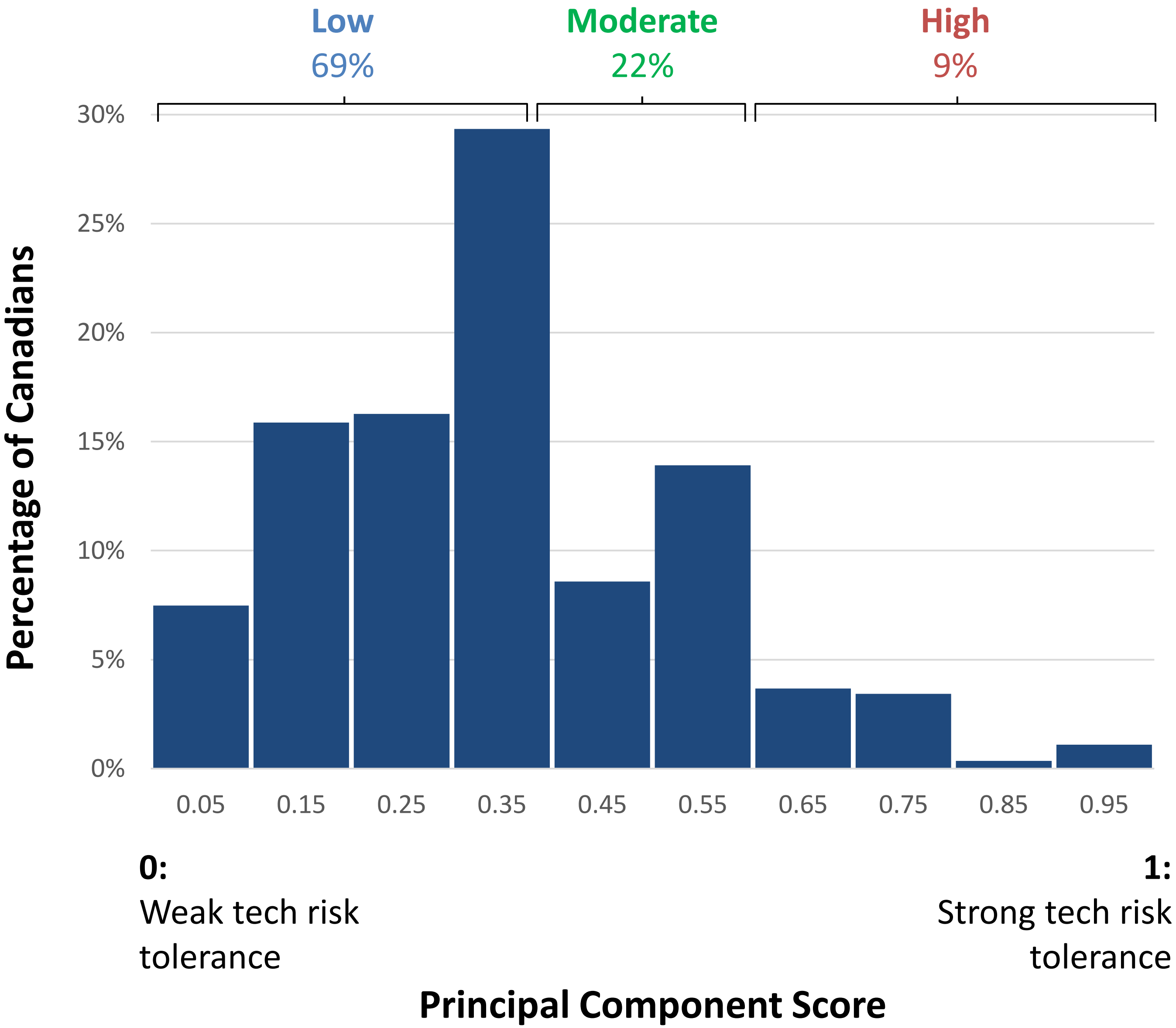
- *"I usually find it easy to learn how to use new technology"* and
- *"I find new technology more frustrating than helpful."* [Reverse-coded]

Those with a score of at least 0.4 are labelled **Low**, those with a score above 0.6 are labelled **High**, and those in the middle are labelled as **Moderate**.

* **Note**: Four variables were included in the PCA, but we report the two variables that contribute the most to the PC here.

Tech Adoption:

Most Canadians are not inclined to early adoption



Tech Risk Tolerance Dimension

This dimension is based on how strongly people agree with two statements*:

- *"I prefer to wait until technology is well tested and widely used before trying it myself"* [Reverse-coded] and
- *"I like being one of the first among my friends or family to try new technology."*

Those with a score of at least 0.4 are labelled **Low**, those with a score above 0.6 are labelled **High**, and those in the middle are labelled as **Moderate**.

* **Note**: Four variables were included in the PCA, but we report the two variables that contribute the most to the PC here.

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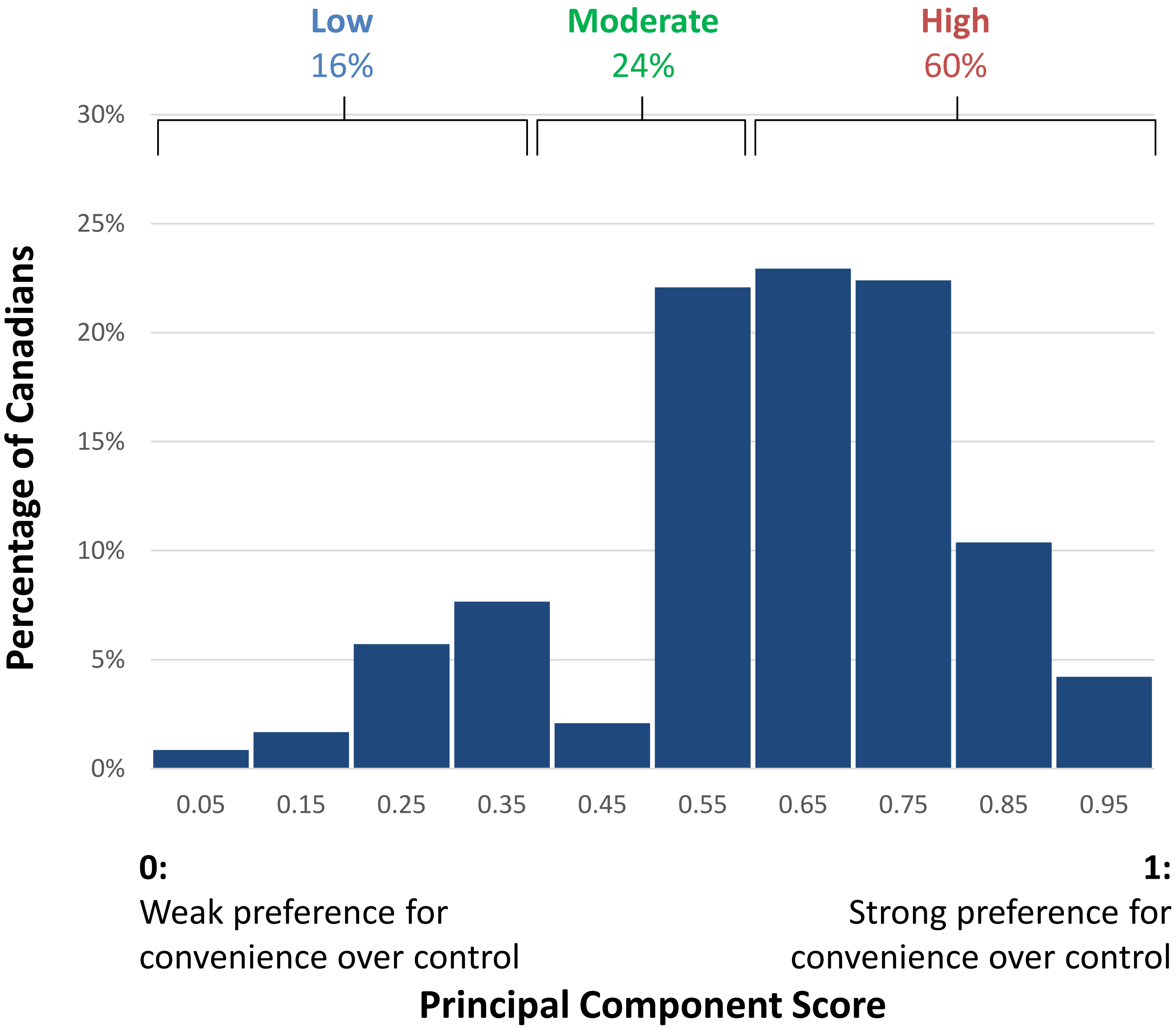
Convenience:

Canadians tend to prefer convenience over control



Convenience Dimension

This dimension is based on how strongly people agree with two statements*:

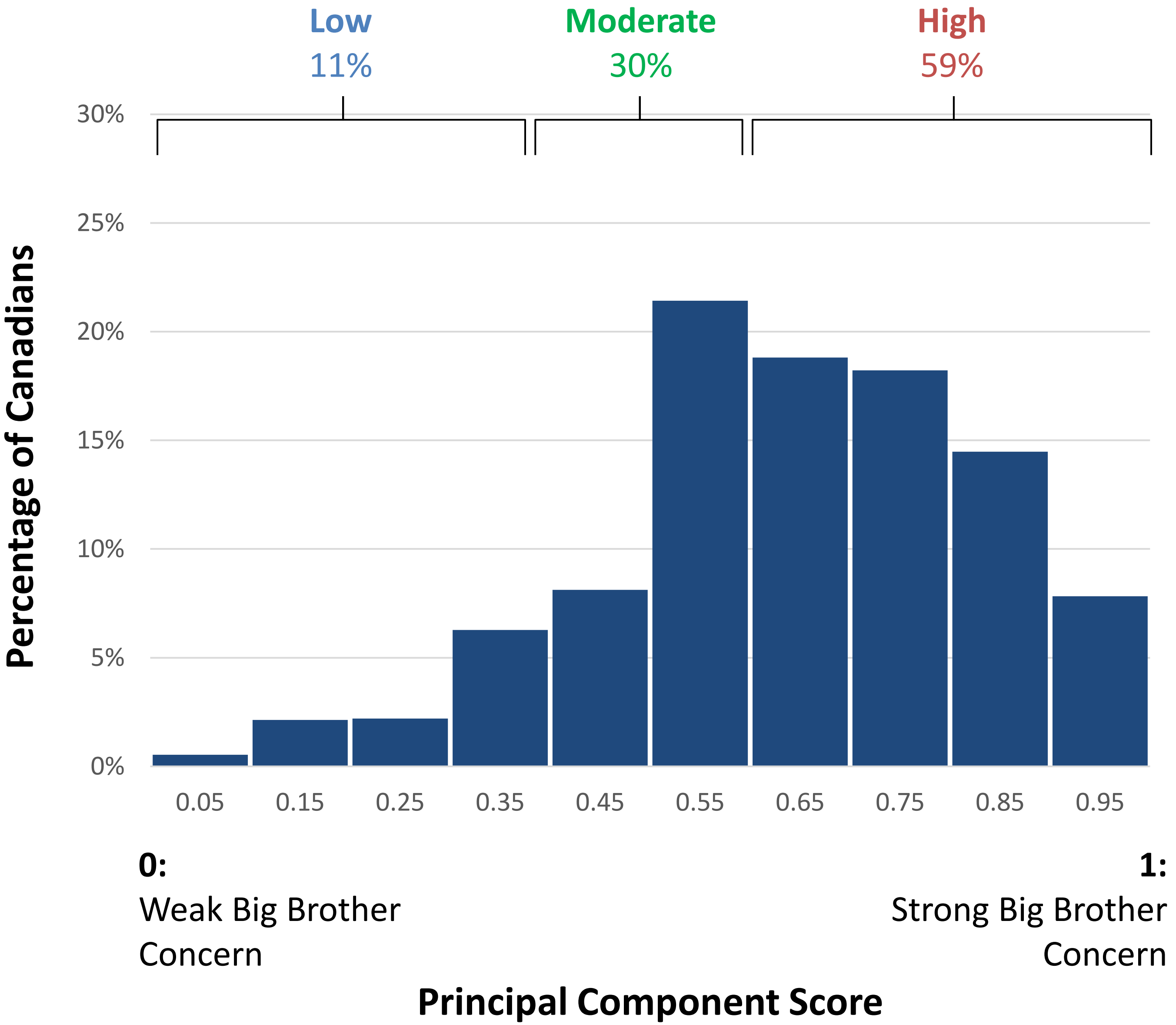
- *"I value convenience more than being fully in control of every decision"* and
- *"I would rather set things up once and let them run automatically, instead of having to manage them myself."*

Those with a score of at least 0.4 are labelled **Low**, those with a score above 0.6 are labelled **High**, and those in the middle are labelled as **Moderate**.

*** Note**: Three variables were included in the PCA, but we report the two variables that contribute the most to the PC here.

Big Brother Concern:

But Canadians are concerned about control and decision-making by technology



Big Brother Concern Dimension

This dimension is based on how strongly people agree with two statements*:

- *"I do not like the idea of companies or organizations controlling things in my home "* and
- *"It bothers me when I feel that technology is making decisions on my behalf."*

Those with a score of at least 0.4 are labelled **Low**, those with a score above 0.6 are labelled **High**, and those in the middle are labelled as **Moderate**.

*** Note**: Three variables were included in the PCA, but we report the two variables that contribute the most to the PC here.

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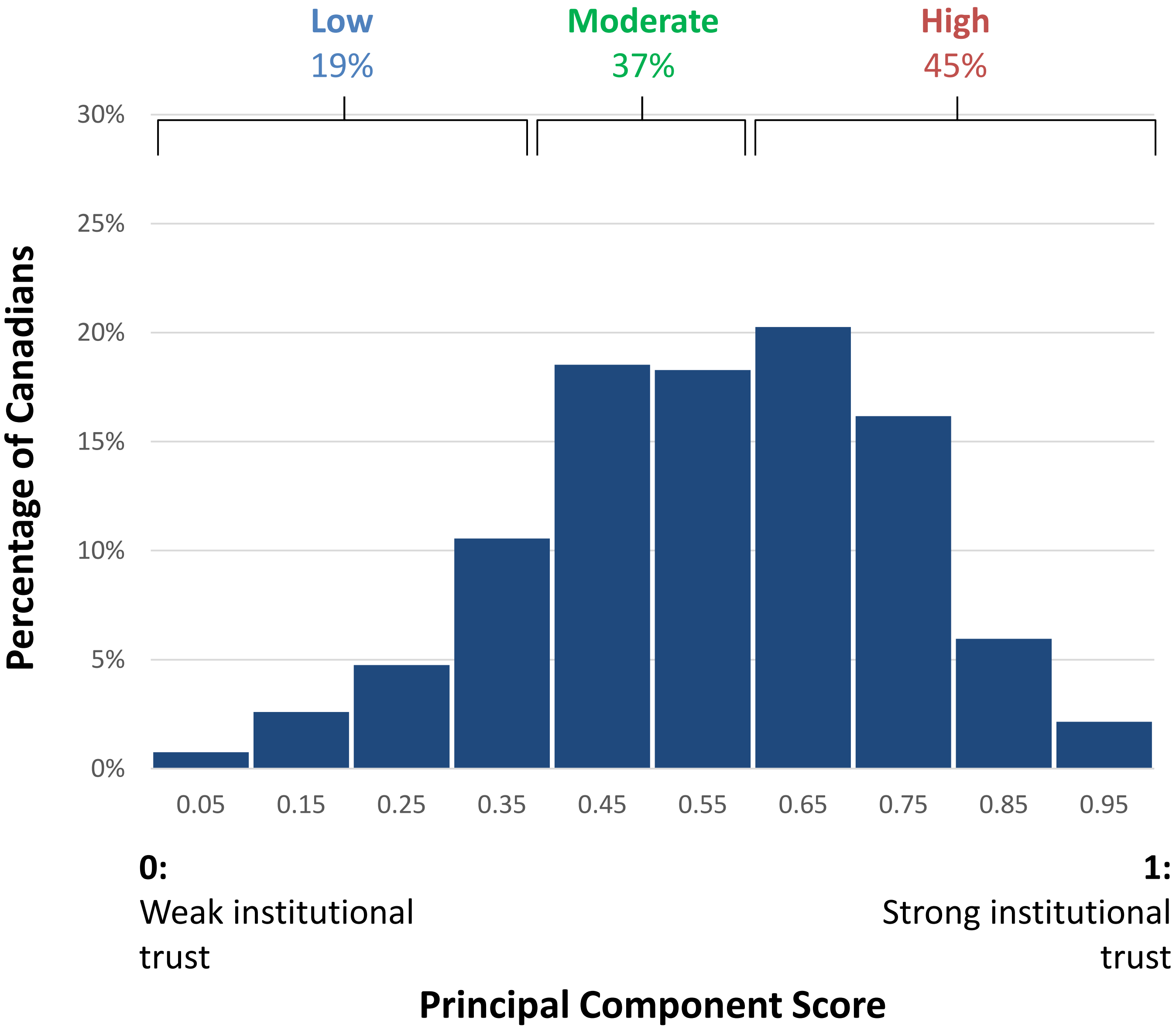
Institutional Trust:

Canadians tend to trust institutions



Institutional Trust Dimension

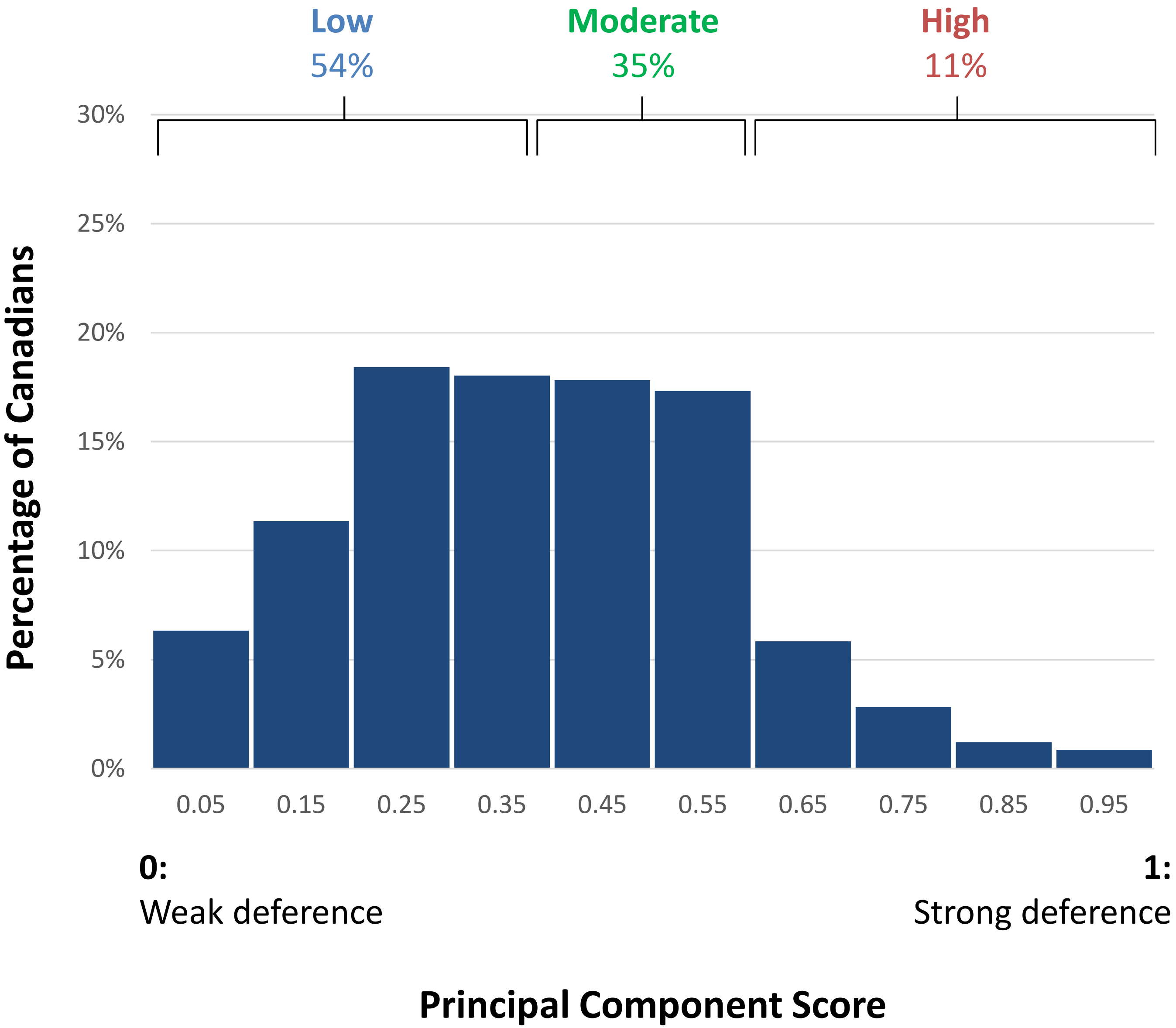
This dimension is based on how strongly people agree with two statements*:

- *"I usually follow recommendations from government or other authorities when deciding what to do"* and
- *"I believe organizations generally act in the best interest of society."*

Those with a score of at least 0.4 are labelled **Low**, those with a score above 0.6 are labelled **High**, and those in the middle are labelled as **Moderate**.

* **Note**: Four variables were included in the PCA, but we report the two variables that contribute the most to the PC here.

Deference:
… but Canadians tend not to be deferential



Deference Dimension

This dimension is based on how strongly people agree with two statements*:

- *"I prefer to make up my own mind, even if it means going against official advice"* [Reverse-coded] and
- *"I sometimes worry that big organizations or government want too much control over people's lives."* [Reverse-coded]

Those with a score of at least 0.4 are labelled **Low**, those with a score above 0.6 are labelled **High**, and those in the middle are labelled as **Moderate**.

* **Note**: Four variables were included in the PCA, but we report the two variables that contribute the most to the PC here.

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Consumer Segmentation

Consumer Segmentation

Cluster analysis helps us find groups of people who are similar to each other.

This lets us:

- Identify **natural groupings** in the data without having to define them in advance.
- See which people are most alike, and which are different.
- Simplify complex data by showing us the "**big picture**" categories that emerge.

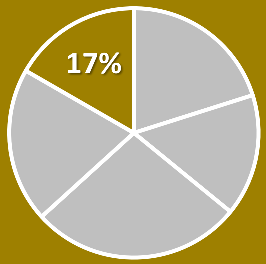
This means we can identify distinct audience segments and tailor strategies to address their unique needs.

Canadian Segments on Grid-edge Tech

Eco-Tech Enthusiasts

High pro-climate behaviors, technology enthusiasm, and low "Big Brother" concern

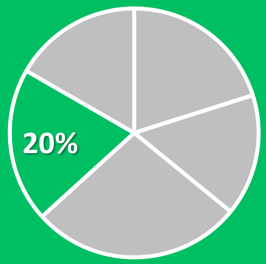
- Skew toward men
- Quebec, BC
- Suburban
- High income
- Favourable to utility
- University educated



Green Pragmatists

High pro-climate behaviors, preference for convenience, and low deference

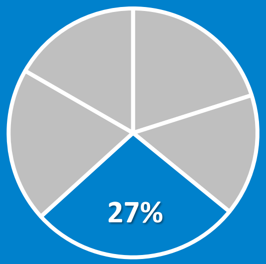
- Younger (18–34)
- Large-city residents
- University educated
- Favourable to utility



Ambivalent

Moderate-high preference for convenience, moderate-low tech risk tolerance

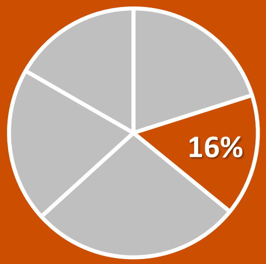
- Suburban
- Neutral toward electrical utility
- Few standout traits



Cautious Strugglers

High financial constraint, and low tech risk tolerance

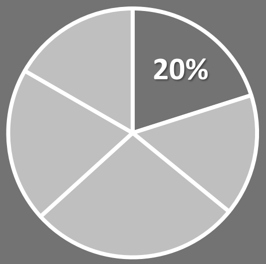
- Older (55+)
- Skew toward women
- Small-town residents
- Quebec



Skeptical Independents

High "Big Brother" concern, low deference and technology risk tolerance

- Older (55+)
- Skew toward women
- HS or less education
- Alberta
- Small-town residents
- Lower income
- Unfavourable to utility



Motivator Cluster: Plurality identify as Ambivalent (27%); Green Pragmatists and Skeptical Independents each at 20%

Respondents' answers to 22 neutrally worded agree/disagree statements across six key areas (environment, cost, technology, trust, control, and convenience) were used to group them into five clusters. This approach helps us better understand the motivations driving each group.

High Pro-climate behaviors & Tech enthusiasm – Low Big Brother concern

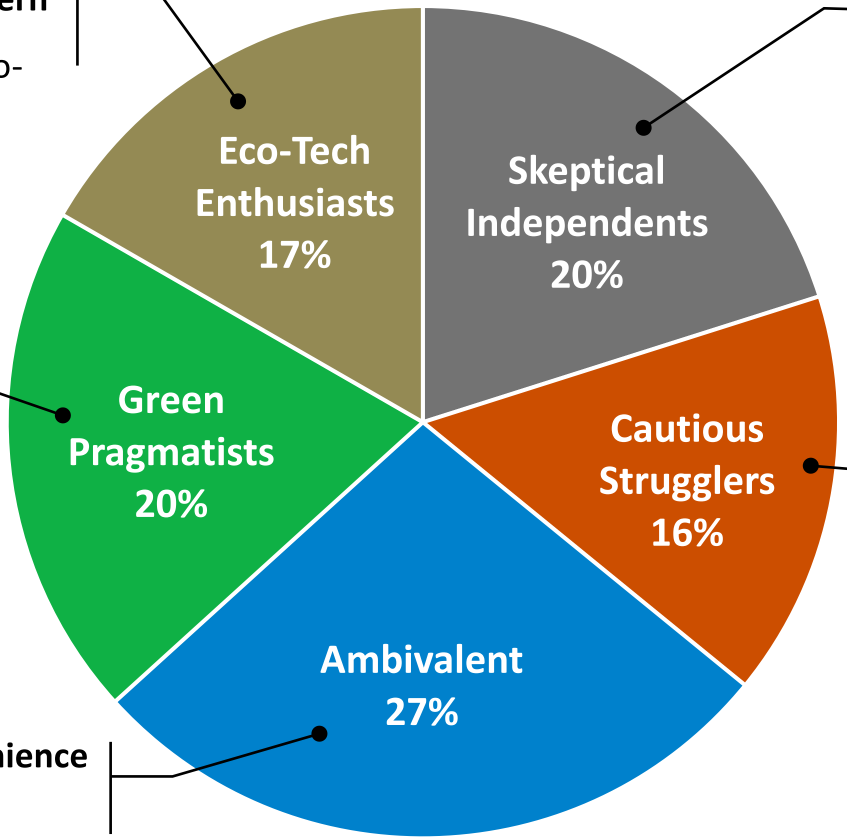
Excited about new tech, strongly pro-environment, low privacy/control concern.

High Big Brother concern – Low Deference & Tech risk tolerance

Guarded about authority, wary of control, and not quick to trust.

High Pro-climate behaviors & Preference for convenience – Low Deference

They care about the environment, but want it to be easy and under their control.



High Financial constraint – Low Tech risk tolerance

Constrained by finances, risk-averse, likely to delay adoption.

Moderate-High Preference for convenience – Moderate-Low Tech risk tolerance

Leans toward ease, somewhat open to technology if it feels safe.

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Defining Motivators Clusters

	Column % (Agree with Statement)	Eco-Tech Enthusiasts	Green Pragmatists	Ambivalent	Cautious Strugglers	Skeptical Independents
Environment	Willingness to make lifestyle changes to protect environment	97%	91%	55%	96%	39%
	Do the right thing for the environment, even if it costs me extra money or time	69%	78%	26%	63%	14%
Cost	Always make sure I’m getting the best value for my money	96%	87%	59%	96%	88%
	I don’t spend much time comparing costs across different options	15%	52%	34%	10%	25%
Convenience	Value convenience more than being fully in control of every decision	57%	73%	35%	9%	31%
	Prefer to set once and run automatically rather than manage myself	74%	86%	54%	34%	61%
Trust	I prefer to make up my own mind, even if it means going against official advice	25%	73%	34%	55%	81%
	Organizations generally act in the best interest of society	58%	67%	26%	24%	10%
Technology	I find new technology more frustrating than helpful	6%	38%	23%	25%	49%
	I like being one of the first among my friends or family to try new technology	51%	56%	21%	12%	10%
Control	I do not like the idea of companies or organizations controlling things in my home	16%	70%	42%	78%	92%
	It bothers me when I feel that technology is making decisions on my behalf	6%	70%	30%	69%	86%

Willingness by Motivator Cluster: Eco-Tech Enthusiasts most likely to participate despite inconveniences; Skeptical Independents least likely

Q If this program sometimes caused small inconveniences (e.g., your air conditioning cycles off for 15 minutes during a hot day), how likely would you still be to participate?
[asked of all respondents; n=2,000]

Post Test Intentions	Total	Eco-Tech Enthusiasts	Green Pragmatists	Ambivalent	Cautious Strugglers	Skeptical Independents
n-size	2,000	334	401	547	316	402
Definitely would still participate	17%	32%	21%	10%	17%	10%
Very likely	24%	33%	33%	22%	21%	14%
Somewhat likely	31%	23%	31%	40%	33%	24%
Not very likely	10%	6%	7%	13%	10%	13%
Not likely at all	8%	2%	4%	5%	6%	22%
Don't know	6%	2%	2%	6%	9%	10%

Note: Not applicable (4%) not shown.

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Appendices

Survey Methodology - Canada

These are the results of an online survey conducted between September 9th to September 14th, 2025.

Method: This online survey was conducted and sponsored by Innovative Research Group Inc. 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.

Sample Size: n=2,097 Canadian citizens, 18 years or older. The results are nationally weighted to n=2,000 based on Census data from Statistics Canada.

Field Dates: September 9th to September 14th, 2025.

Weighting: Results for Canada are weighted by age, gender, region, and education to ensure that the overall sample’s composition reflects that of the actual population according to Census data. Weighted and unweighted frequencies are reported in the table.

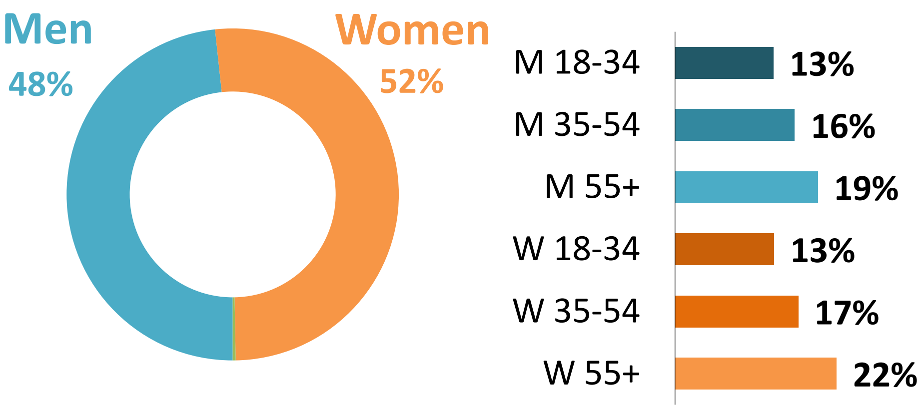
Margin of Error: This is a representative sample. However, since the online survey was not a random probability-based sample, a margin of error cannot be calculated. Statements about margins of sampling error or population estimates do not apply to most online panels.

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	234	11.2%	264	13.2%
Men 35-54	329	15.7%	321	16.1%
Men 55+	432	20.6%	383	19.2%
Women 18-34	277	13.2%	266	13.3%
Women 35-54	335	16.0%	331	16.5%
Women 55+	488	23.3%	434	21.7%
British Columbia	295	14.1%	283	14.2%
Alberta	228	10.9%	222	11.1%
Prairies	149	7.1%	128	6.4%
Ontario	791	37.7%	772	38.6%
Québec	484	23.1%	460	23.0%
Atlantic	150	7.2%	134	6.7%

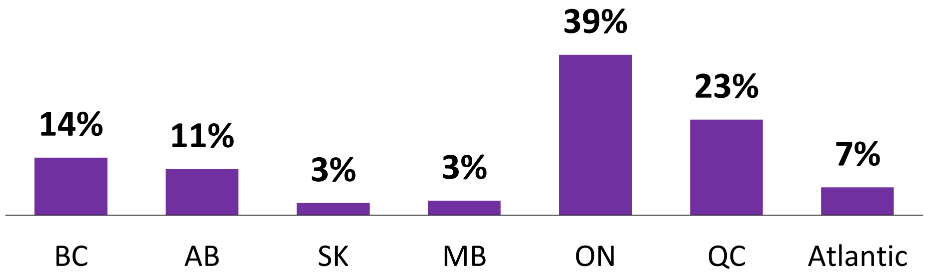
Demographics: *Respondent Profile*

Gender and Age

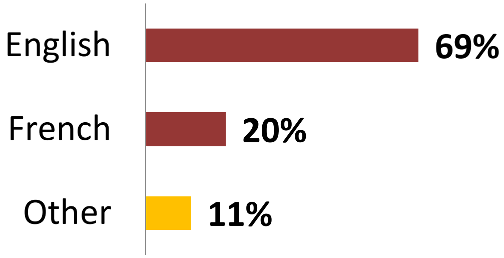


Note: <1% Prefer not to say.

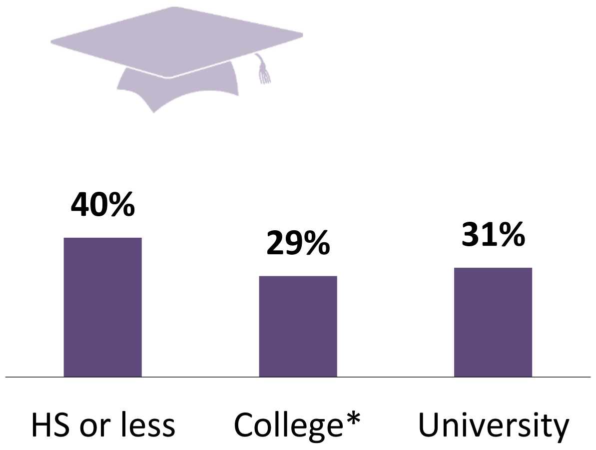
Province



Mother Tongue

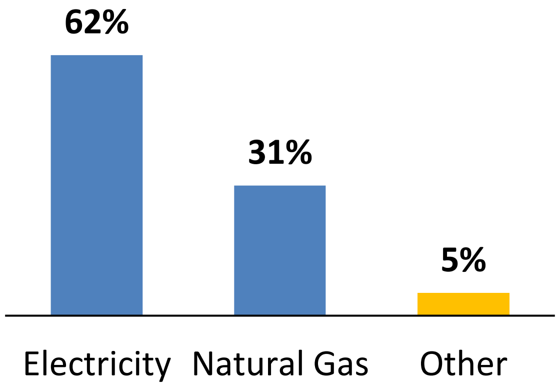


Education



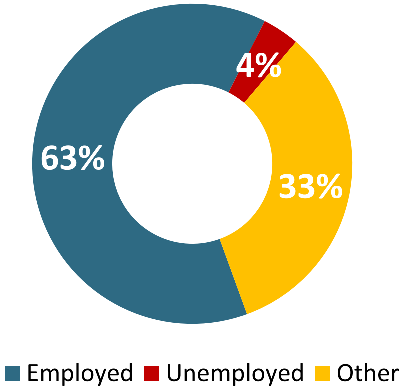
* Includes Diploma and Apprenticeship
Note: <1% Prefer not to say.

Primary Home Heating Source



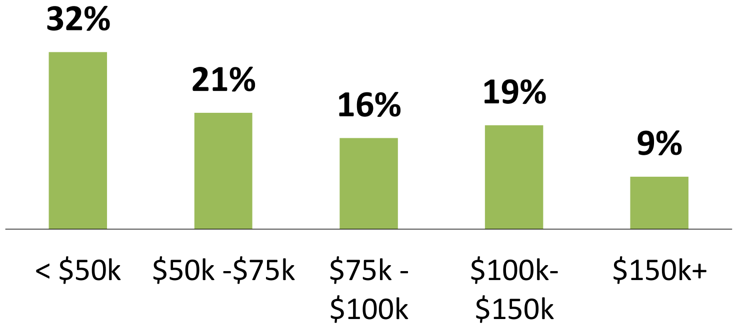
Note: 1% Don't know.

Employment Status



Note: 'Retired', 'students', 'homemaker' etc. are included in 'Other'; <1% Prefer not to say.

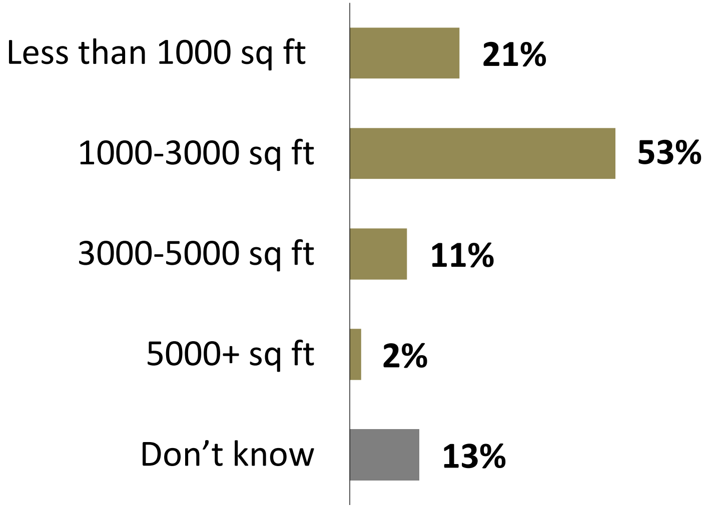
Household Income



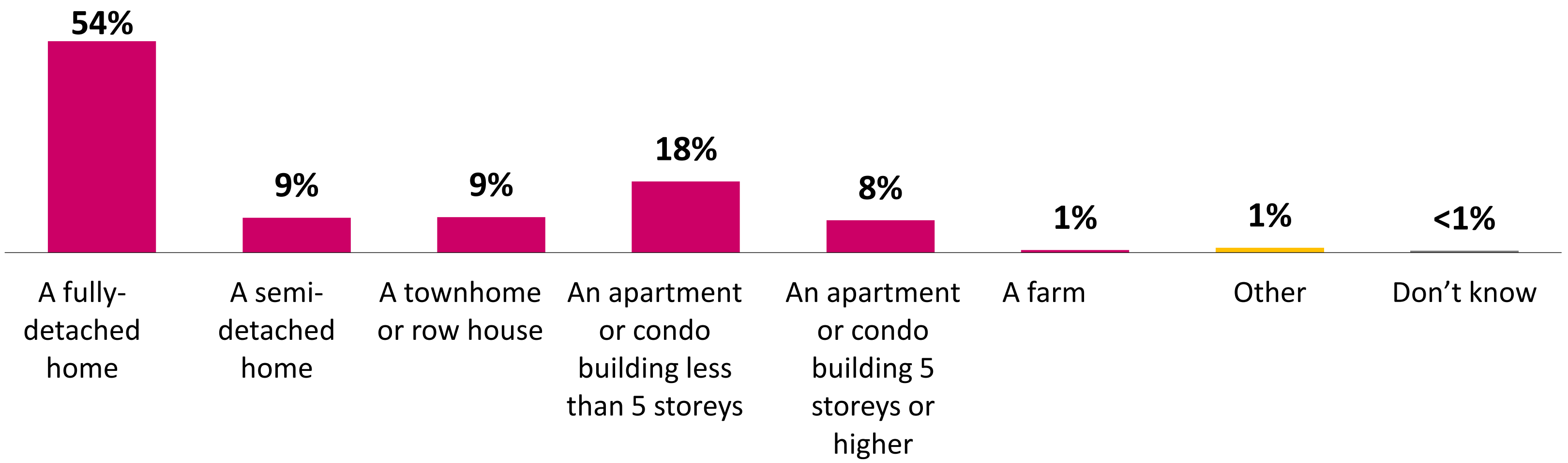
Note: 2% Prefer not to say.

Demographics: *Respondent Profile (cont.)*

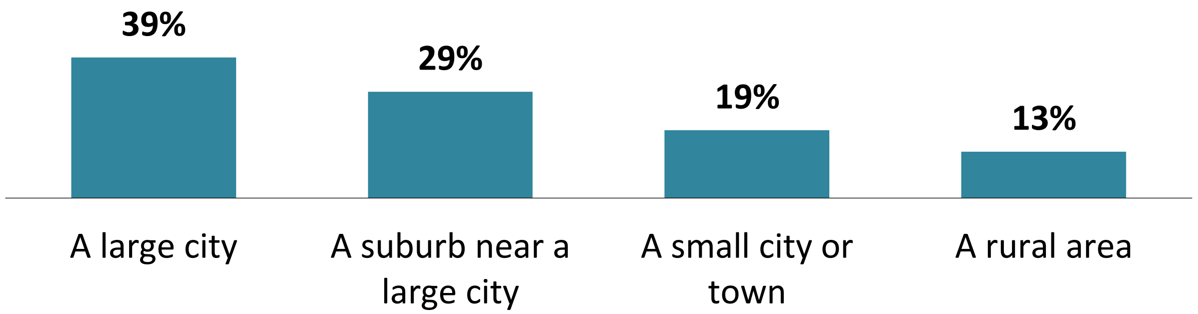
Home Square footage



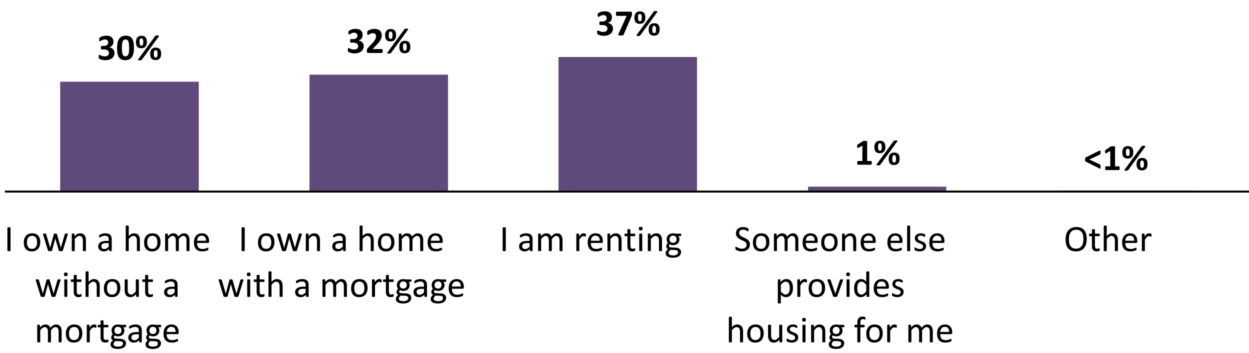
Primary Residence



Area



Homeownership



***Note**: Multiple-response question. Percentages may not sum to 100%.

Note: <1% Prefer not to say.

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