

National survey Clean Electricity Regulation

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November 2022



Conservation Council of New Brunswick
Conseil de conservation *du* Nouveau-Brunswick
www.conservationcouncil.ca

METHODOLOGY

The survey was conducted with 2,000 adult Canadian residents from October 7 to 11, 2022. A random sample of panelists were invited to complete the survey from a set of partner panels based on the Lucid exchange platform. These partners are typically double opt-in survey panels, blended to manage out potential skews in the data from a single source.

Region	Sample size
NL and PEI	100
NB	200
NS	200
Ontario	600
Quebec	300
Manitoba/Saskatchewan	200
British Columbia	200
Alberta	200
Total	2000

The margin of error for a comparable probability-based random sample of the same size is +/- 2.19%, 19 times out of 20.

The data were weighted according to census data to ensure that the sample matched the population according to age, gender, and region. Totals may not add up to 100 due to rounding.

KEY TAKEAWAYS

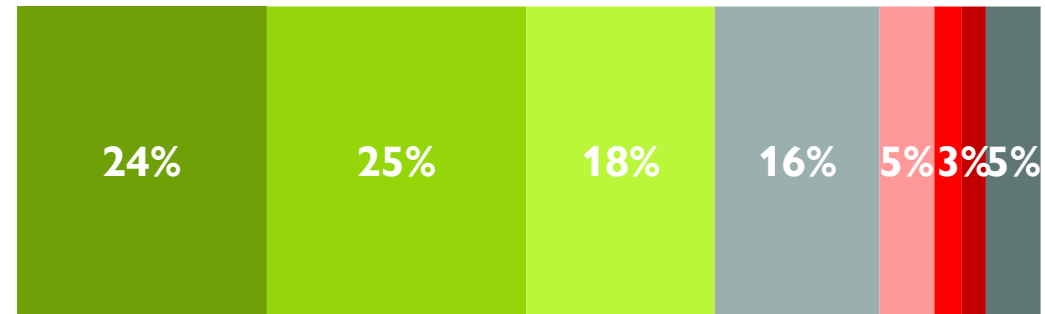
1. Canadians are bought in on renewable energy sources powering their electricity supply. They believe that transitioning to these sources will have a positive impact on power rates.
2. There is significant social buy in on government prioritizing investment in clean energy.
3. More find the government's plan to regulate electricity suppliers so that they produce little to no GHGs by 2035 fair than unfair, and regardless of its perceived fairness the majority find the plan acceptable.
4. Some assume negative impacts on Canadians' financial security coming from this approach, but many agree it will have protective effects on the environment.
5. Energy security framing was favoured over electrification framing.
6. Affordability frames most positively influence perceptions of fairness and acceptability of a clean electricity regulation.
7. Regional patterns suggest generating renewable energy within province preferred over out-of-province imports; transmission discussions may benefit from emphasizing trade/reliability to support in-province renewables.

Electricity transition framing

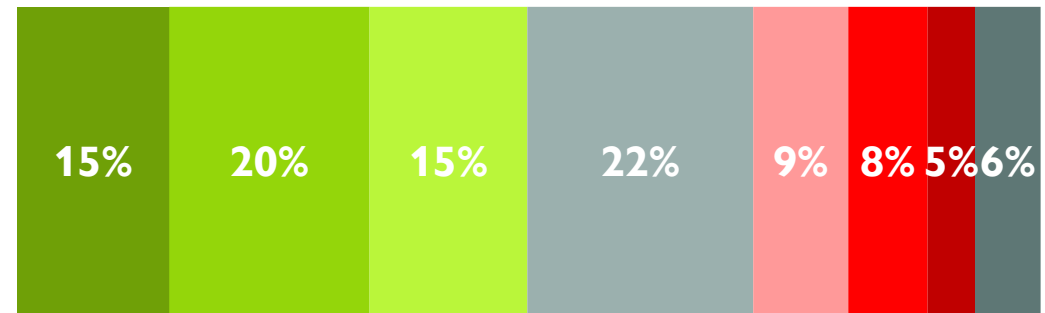
Energy security or Electrification

STATEMENT TESTING

Canada's energy system is dominated by oil, gas, and coal leaving Canadians susceptible to the geopolitics of global producers and unpredictable market forces. Renewable energy prices do not fluctuate with global fuel markets, making them less susceptible to volatility and price spikes. **Governments should prioritize investments in clean, flexible, and reliable electricity grids to support energy security.**



Canada is positioned to manage high amounts of variable renewable energy without compromising reliability. Electrification of transportation and heating can further protect Canadians from exposure to volatile fossil fuel markets. **Using electricity to power our lives means we spend more on electricity. But household energy bills fall because electric vehicles are cheap to operate compared to gasoline.**



■ Strongly agree
 ■ Agree
 ■ Slightly Agree
 ■ Neutral
 ■ Slightly disagree
 ■ Disagree
 ■ Strongly disagree
 ■ Not sure

KEY FINDINGS

Most Canadians agree (68%) that governments should prioritize investments in clean, flexible, and reliable electricity grids to support energy security & shield them from global market volatility.

- There's a significant age gap on agreement with the statement tested, with 72% of those under 60 in agreement while only 59% of those over 60 agree.
- British Columbians are significantly more likely to agree (80%) while Albertans are significantly less likely to agree (52%).
- LPC voters are most likely to agree with this sentiment (78%) while Conservative voters are least likely to agree (58%).

Canadians are less likely to agree (50%) with the statement conveying that electrification means we spent more on electricity but household energy bills fall because electric vehicles are cheap to operate compared to gasoline

- Albertans are much less likely to agree (35%) and Quebecers are more likely to agree (64%).
- Liberal voters are far more likely to agree (64%) and Conservatives are far less likely to agree (35%).

EXPERIMENTAL GROUPS

CONTROL GROUP: No narrative provided.

EXPERIMENTAL GROUPS 1 & 2: Intro text the same for both narratives:

Please read this statement and then answer the questions that follow.

Some provinces, utilities and industry oppose ending the use of polluting electricity sources between 2030 and 2035. Failure to meet this deadline risks our climate goals and lets polluters off the hook. Everyone agrees that we need solutions that are fair, affordable, and realistic, but there are disagreements on the best pathway. Some governments and utilities propose natural gas as a solution, but it is a fossil fuel unbalancing the climate.

Some propose new nuclear or hydrogen technologies, which are far-off options that carry their own environmental risks. Non-polluting options like wind and solar are a less polluting, more affordable pathway. Renewable energy does take more planning. And we need to use it efficiently to keep demand from growing too quickly as we use more electricity to power our lives.

EXPERIMENTAL GROUPS

EXPERIMENT GROUP 1 CLOSING NARRATIVE:

National project narrative: We can build a clean electricity grid nationwide. It'll make our communities healthier. It's one important solution to climate change. And it showcases Canadian ingenuity, cooperation and determination to the world. Reliable, renewable electricity. We can build it, together.

EXPERIMENT GROUP 2 CLOSING NARRATIVE:

Affordability narrative: Partnering with governments shares the cost of wind and solar investments. We use more electricity, but overall energy bills go down because we insulate homes, use heat pumps, efficient appliances, and electric transportation. Electricity powering our lives. It's affordable.

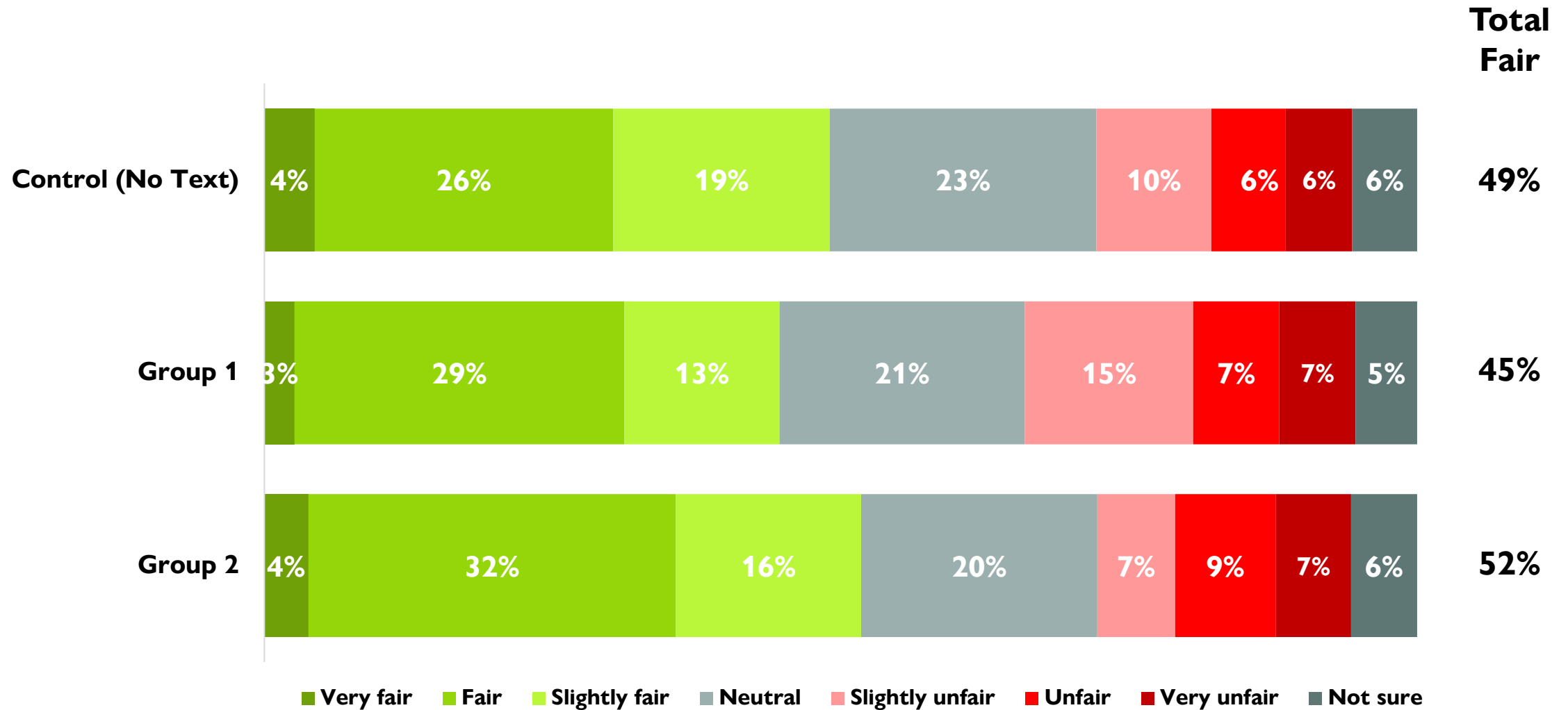
KEY FINDINGS

About half of Canadians (49%) believe the federal clean electricity regulation is fair when the details are explained. Different pretext statement groups did not differentiate significantly from the control group, to whom no statement was shown. The affordability narrative (Group 2), however, does generate stronger perceptions of fairness (48%, very fair, fair) than the control group (42%) or national project narrative (40%).

Some demographic factors did significantly influence perceived fairness:

- Those who are university educated (59%), with household incomes of \$80k+ (58%), and those who vote Liberal (65%) are much more likely than the national average to believe the plan is fair.
- Conservatives (33%) and rural residents (37%) are much less likely to think its fair.

FEDERAL CLEAN ELECTRICITY REGULATION FAIRNESS



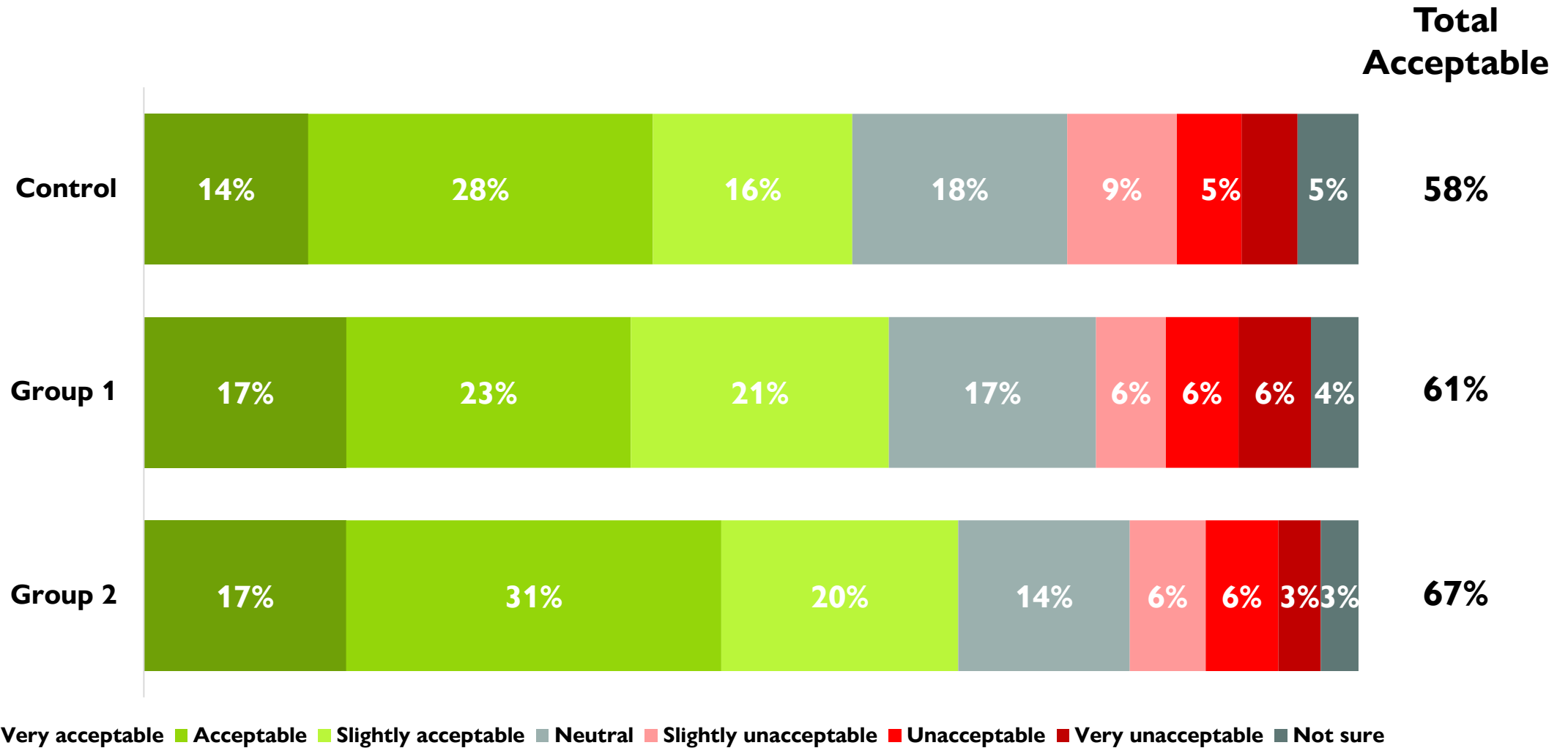
The federal clean electricity regulation means that by 2035 utilities and electricity providers produce little to no greenhouse gas emissions. The policy will also increase the size of the overall electricity system in Canada to supply the power needed for electric vehicles, trucks and transit systems. Investments could increase power rates, but household power bills will not increase if homes have energy efficiency upgrades, and vehicles shift from gasoline to electricity. How fair is this policy measure to you?

KEY FINDINGS

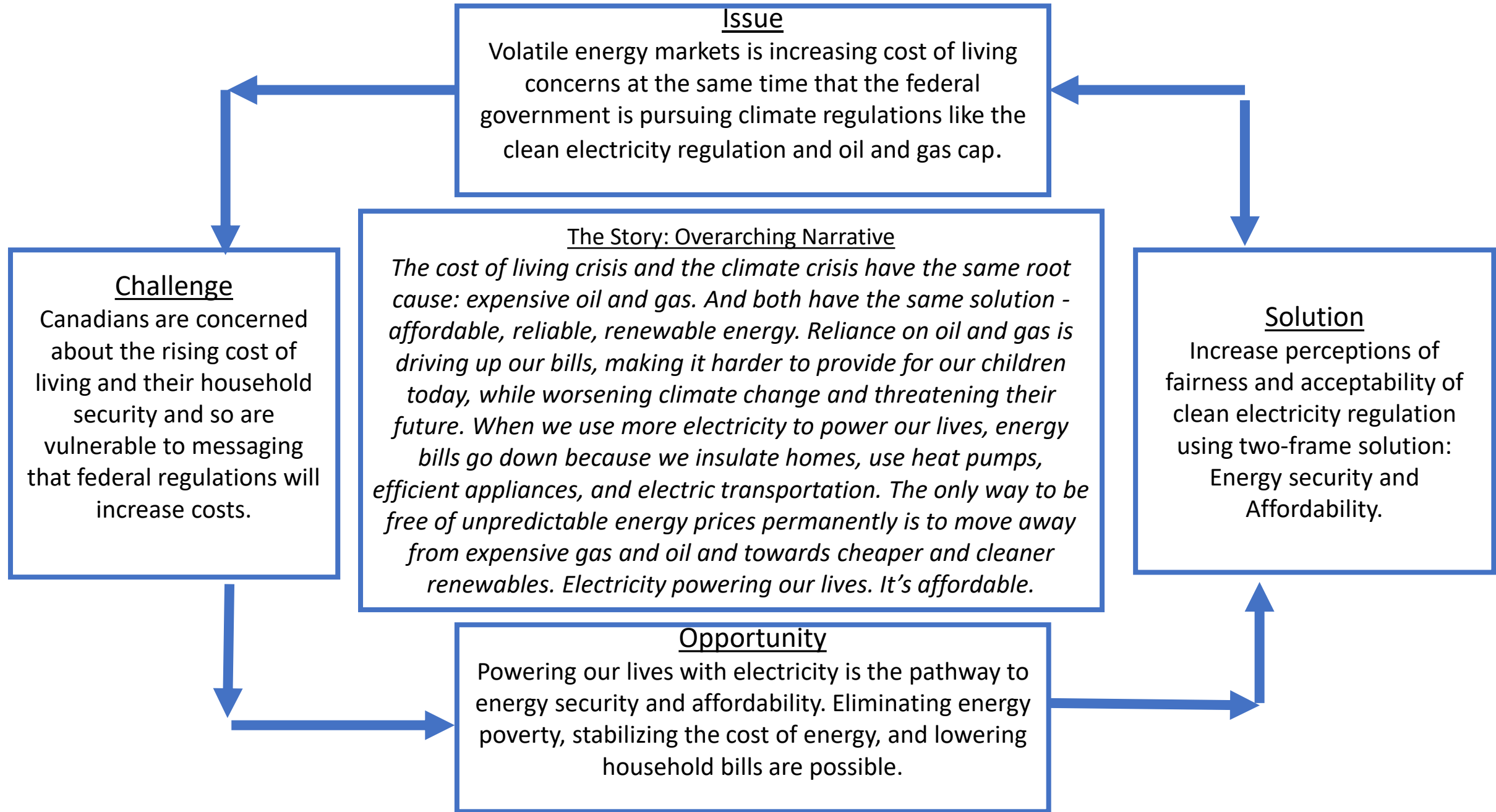
More, about 6 in 10, believe the federal government's plan to regulate electricity suppliers so that by 2035 they produce little to no greenhouse gas emissions is acceptable. The affordability narrative received increased perceptions of acceptability (67%, very acceptable, acceptable, slightly acceptable), compared to the control group (58%) and the national project narrative (61%).

- Those who vote Liberal (80%) and NDP (76%) are more likely to think this approach is acceptable than the national average, while Conservative voters (46%) and Albertans (48%) are much less likely to find it acceptable.

FEDERAL CLEAN ELECTRICITY REGULATION ACCEPTABILITY



Still thinking about the federal government's plan to regulate electricity suppliers so that by 2035 they produce little to no greenhouse gas emissions, how acceptable is this policy measure to you?



Digging deeper into the total results

Slightly fair, fair

Slightly acceptable, acceptable

Slightly agree, agree

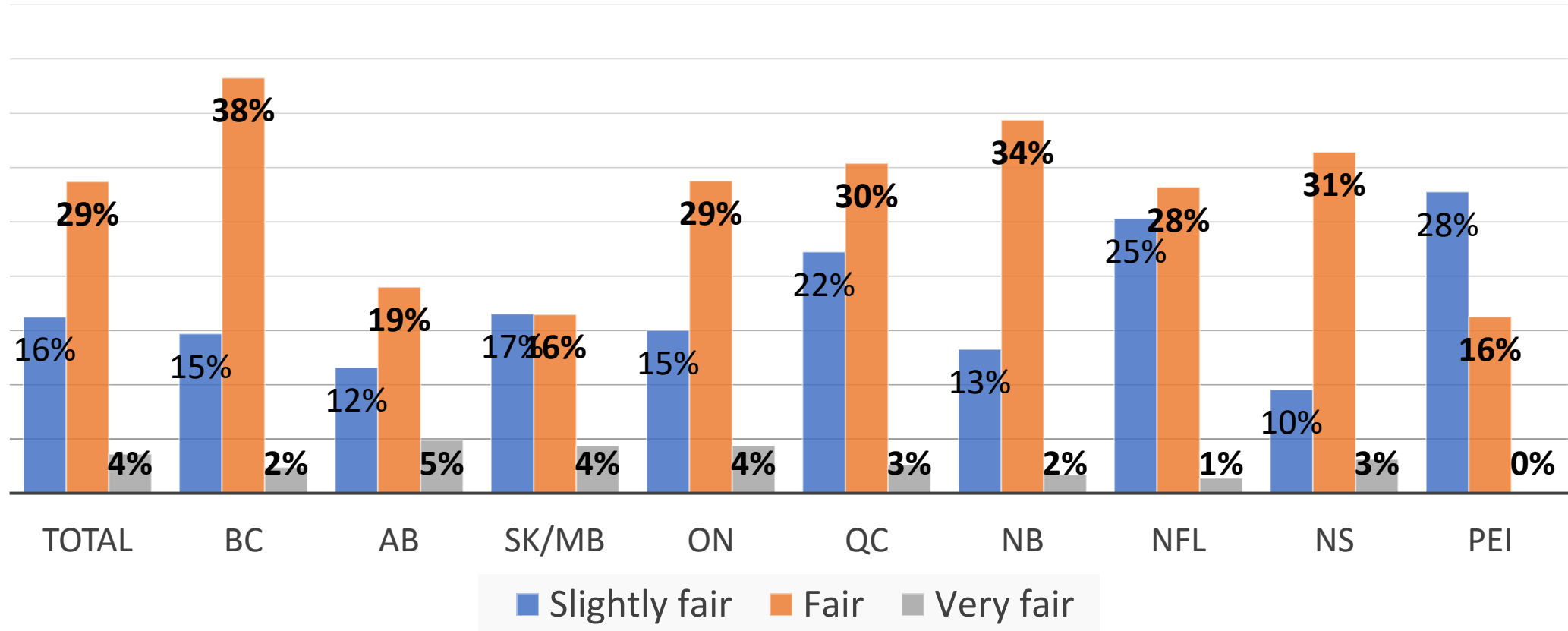
Strongly

General fairness perceptions: Clean electricity regulation

The federal clean electricity regulation means that by 2035 utilities and electricity providers produce little to no greenhouse gas emissions. The policy will also increase the size of the overall electricity system in Canada to supply the power needed for electric vehicles, trucks and transit systems. Investments could increase power rates, but household power bills will not increase if homes have energy efficiency upgrades, and vehicles shift from gasoline to electricity. How fair is this policy measure to you?

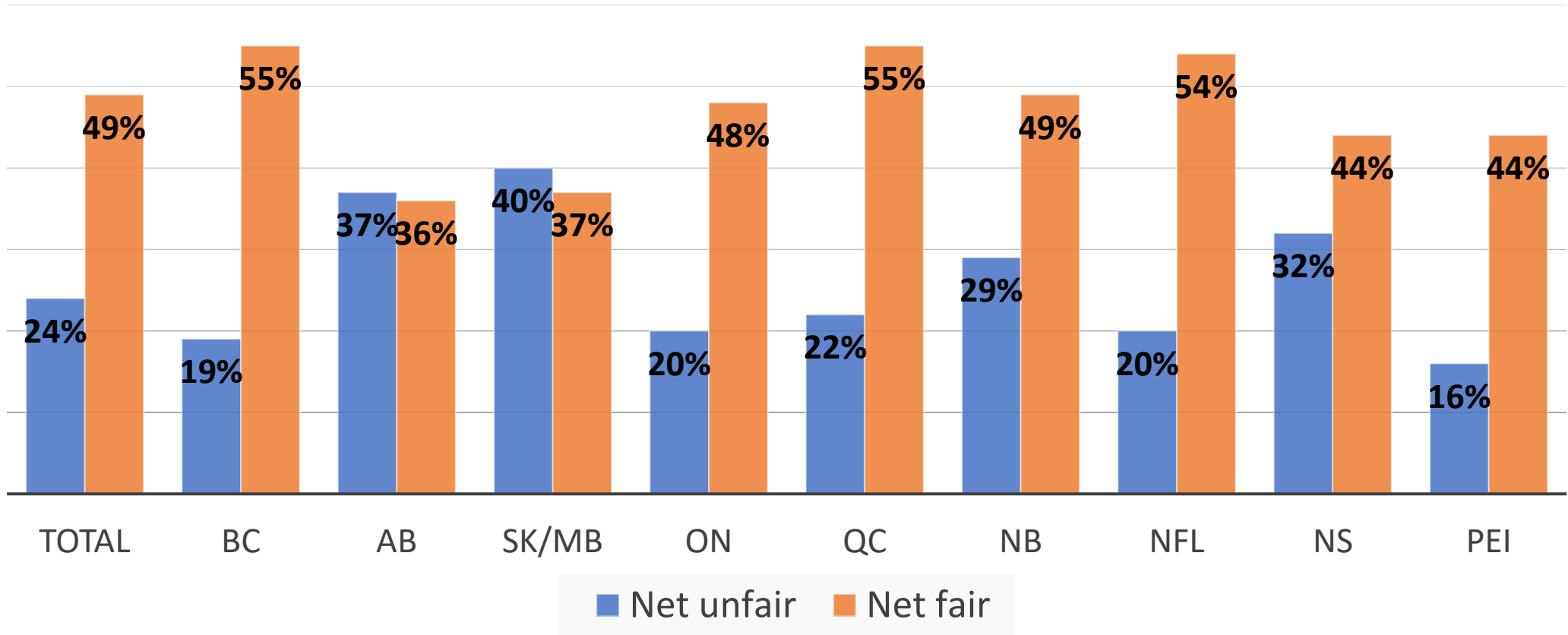
How fair is this policy measure to you?

(Total fair = 49%)



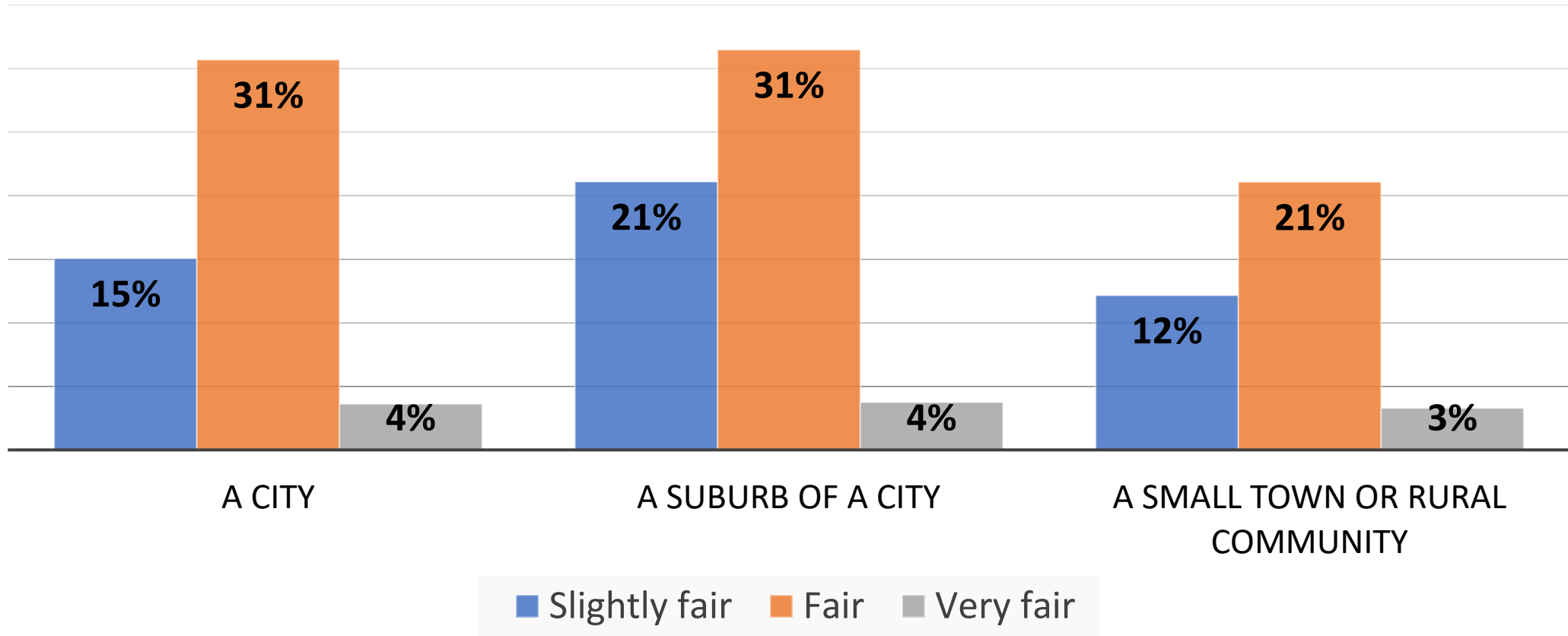
How fair is this policy measure to you?

(Net unfair; Net fair)



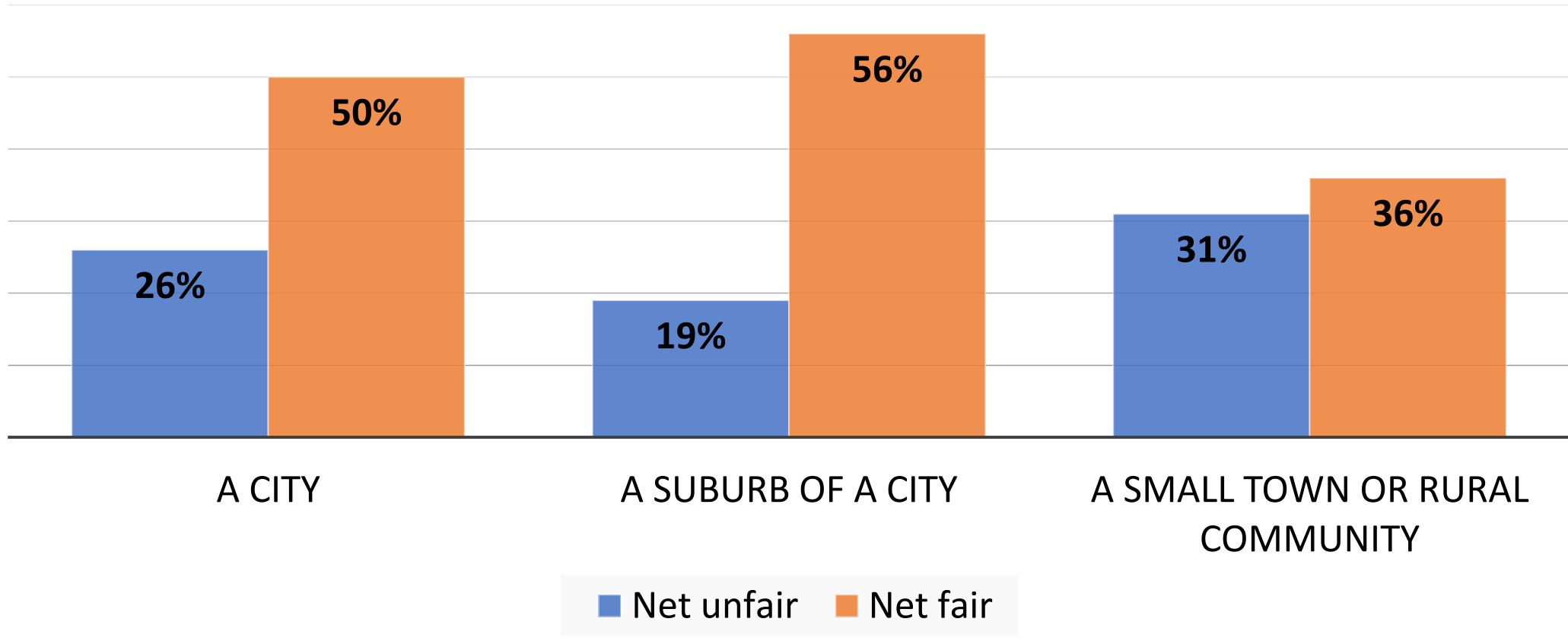
How fair is this policy measure to you?

(Total fair = 49%)



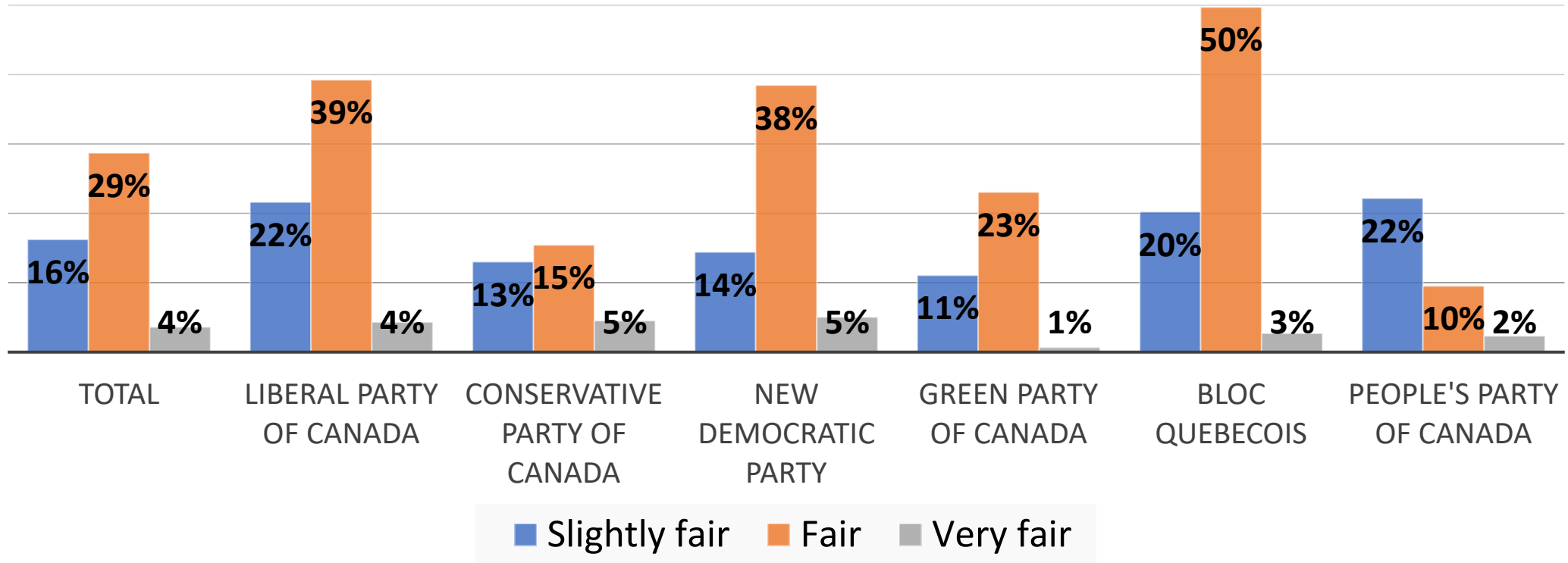
How fair is this policy measure to you?

(Net unfair; Net fair)



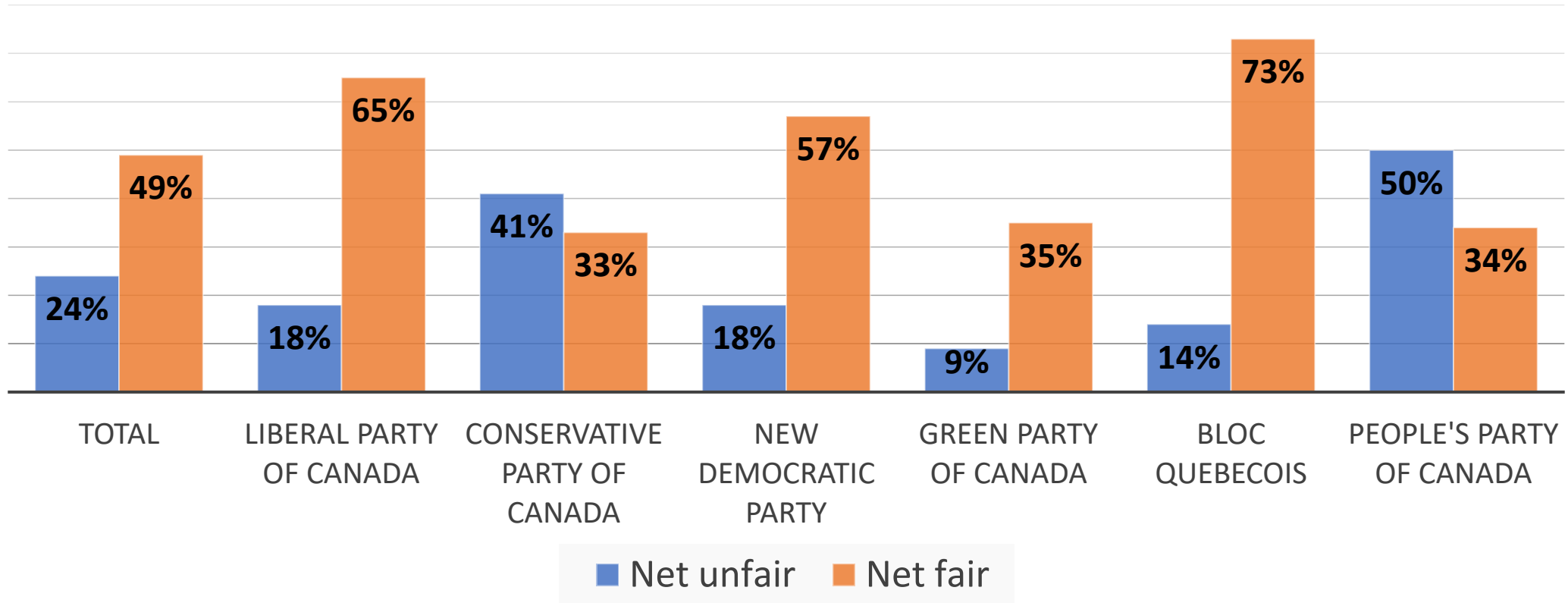
How fair is this policy measure to you?

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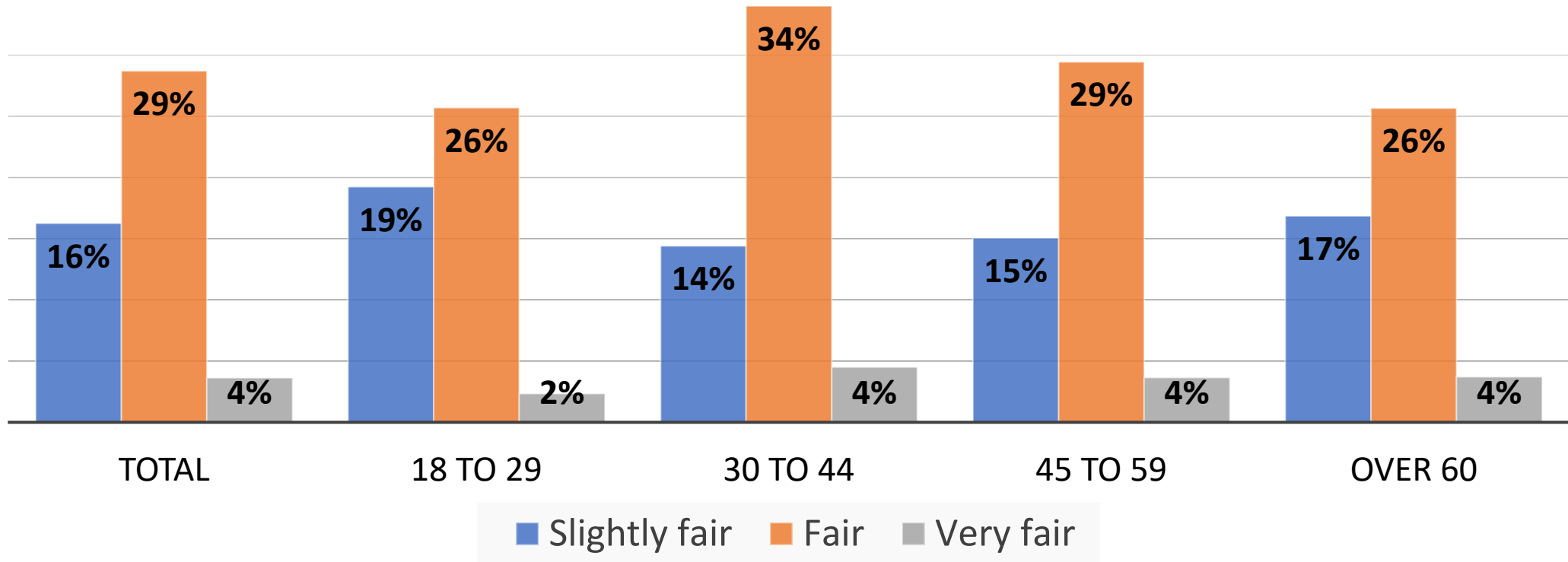
How fair is this policy measure to you?

(Net unfair; Net fair)



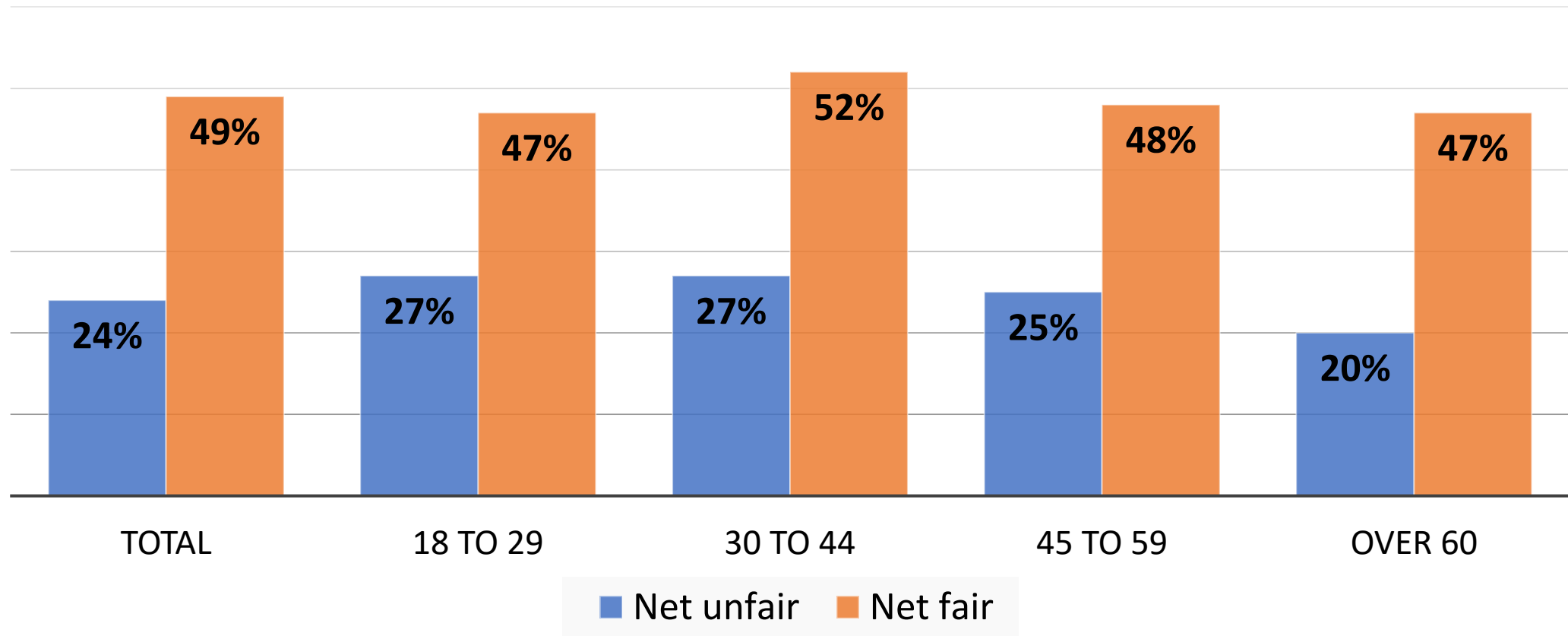
How fair is this policy measure to you?

(Total fair = 49%)



How fair is this policy measure to you?

(Net unfair; Net fair)



KEY FINDINGS

Majorities or significant pluralities of Canadians agree that the federal government's plan to regulate electricity suppliers will:

1. Impact high consumers of electricity (69% agree) & low-income families (67% agree) the most;
2. Have protective effects on the environment (60% agree); and,
3. Negatively impact their financial situation (49% agree).

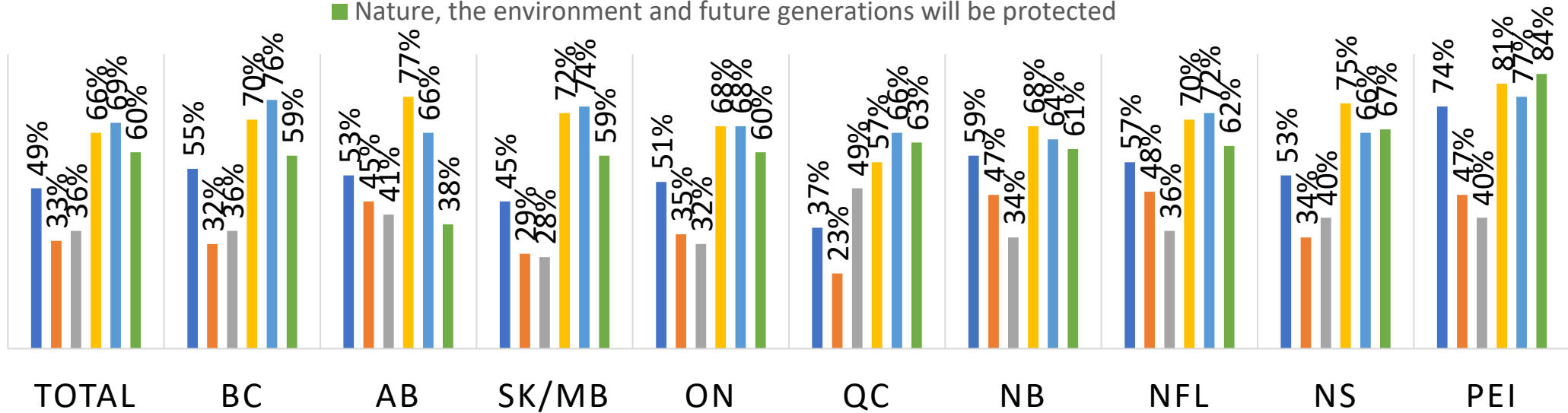
There is less consensus on whether the regulation will impact everyone the same (37% agree) and on whether or not the change will leave them personally worse off than others (33% agree).

- Low income and rural Canadians are more likely to believe they will be most disadvantaged by these policies.

DISTRIBUTIONAL FAIRNESS

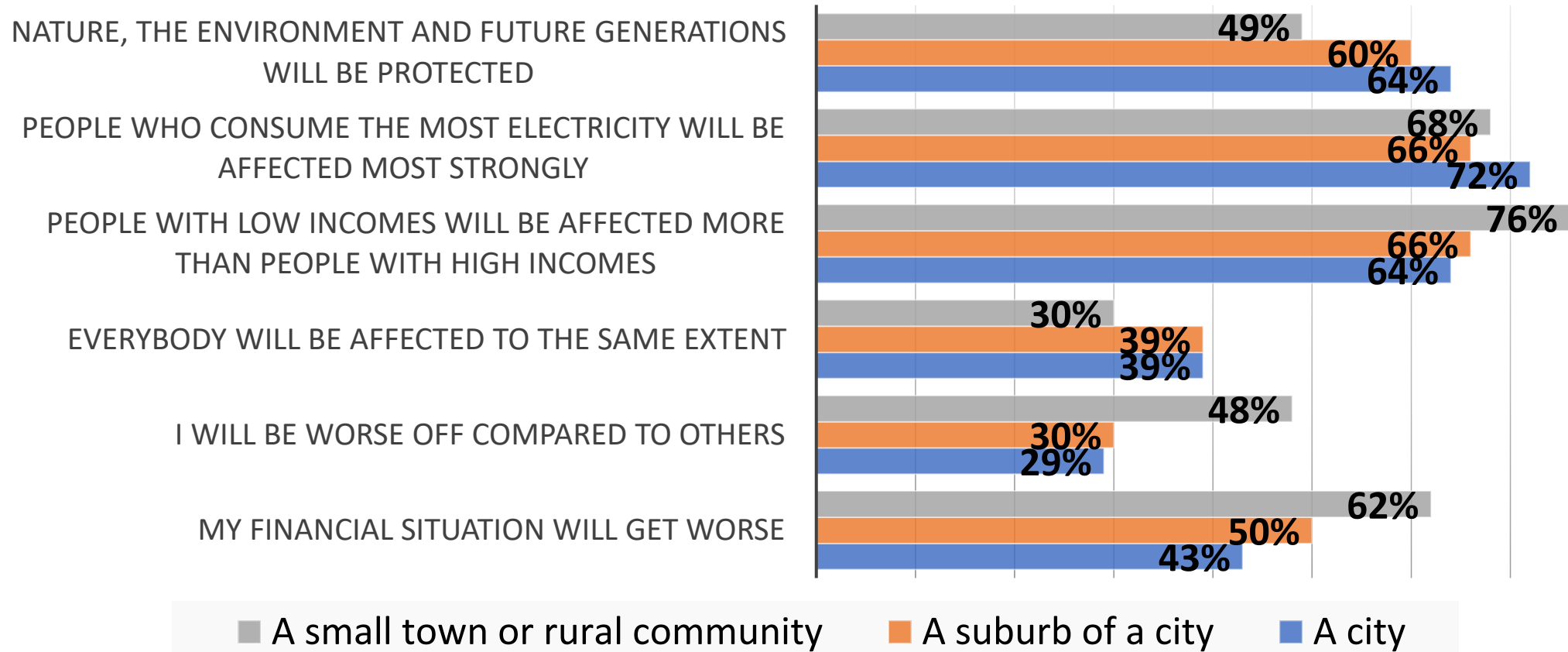
NET AGREE: STRONGLY AGREE, AGREE, SLIGHTLY AGREE

- My financial situation will get worse
- I will be worse off compared to others
- Everybody will be affected to the same extent
- People with low incomes will be affected more than people with high incomes
- People who consume the most electricity will be affected most strongly
- Nature, the environment and future generations will be protected



DISTRIBUTIONAL FAIRNESS

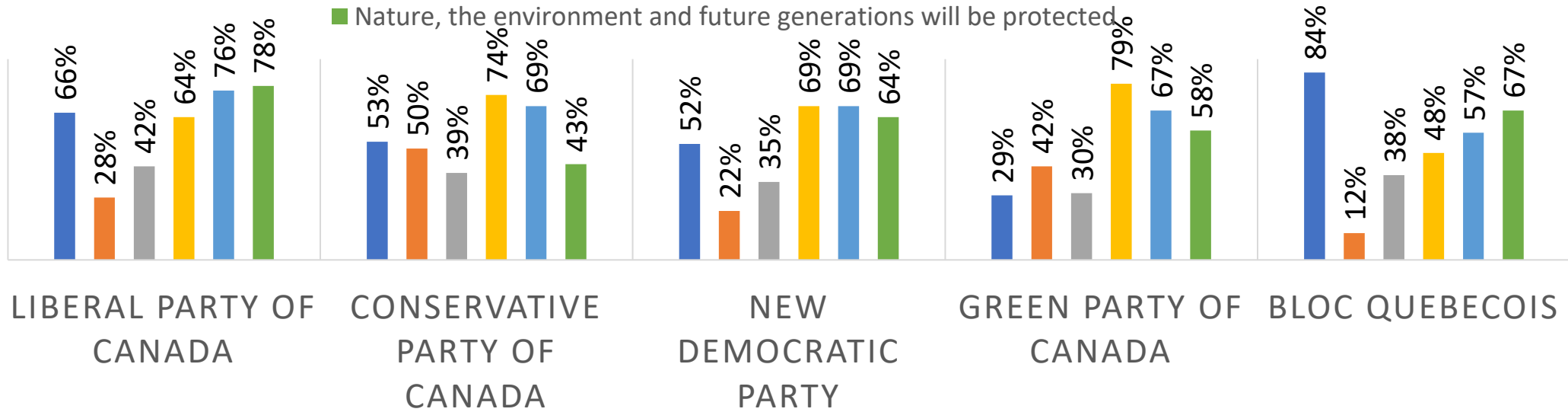
NET AGREE: STRONGLY AGREE, AGREE, SLIGHTLY AGREE



DISTRIBUTIONAL FAIRNESS

NET AGREE: STRONGLY AGREE, AGREE, SLIGHTLY AGREE

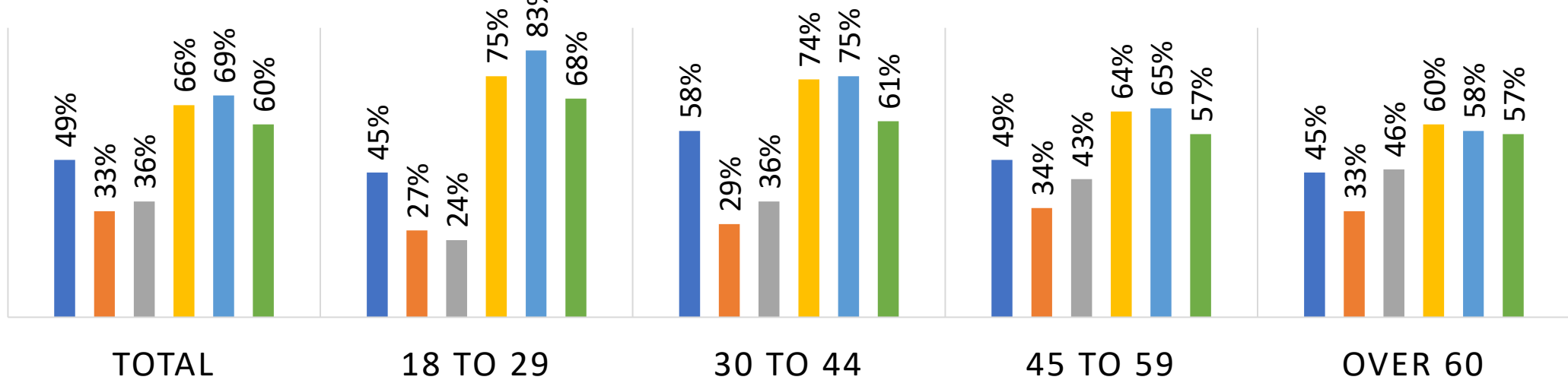
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DISTRIBUTIONAL FAIRNESS

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- My financial situation will get worse
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- Everybody will be affected to the same extent
- People with low incomes will be affected more than people with high incomes
- People who consume the most electricity will be affected most strongly
- Nature, the environment and future generations will be protected



CLEAN ELECTRICITY REGULATION IMPACTS

% AGREE	TOTAL	EDUCATION			HH INCOME			VOTE INTENT						COMMUNITY		
	TOTAL	HS or less	College	University	Under \$39,999	\$40,000 - \$79,999	\$80,000 +	LPC	CPC	NDP	GPC	BQ	Other	Urban	Suburban	Rural
People who consume the most electricity will be affected most strongly	69%	69%	69%	68%	68%	69%	70%	76%	69%	69%	68%	58%	70%	72%	65%	68%
People with low incomes will be affected more than people with high incomes	67%	72%	69%	61%	68%	70%	64%	64%	74%	69%	78%	48%	79%	64%	66%	77%
Nature, the environment and future generations will be protected	60%	59%	54%	68%	60%	59%	65%	77%	43%	64%	59%	68%	45%	65%	61%	49%
My financial situation will get worse	49%	45%	56%	44%	52%	49%	47%	36%	67%	53%	52%	29%	78%	43%	50%	62%
Everybody will be affected to the same extent	37%	32%	39%	38%	39%	35%	38%	42%	39%	35%	31%	38%	27%	39%	39%	30%
I will be worse off compared to others	33%	31%	38%	30%	37%	36%	27%	27%	50%	22%	42%	12%	49%	29%	30%	48%

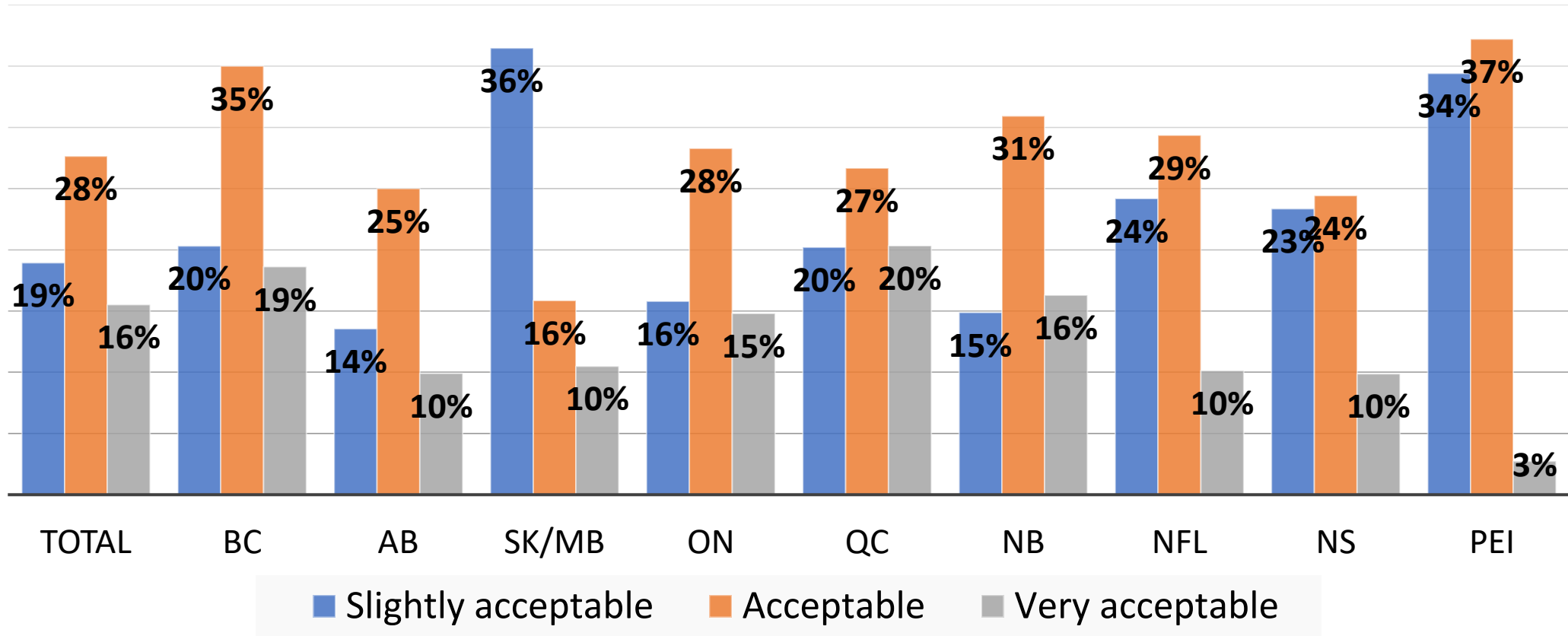
Still thinking about the federal government's plan to regulate electricity suppliers so that by 2035 they produce little to no greenhouse gas emissions, how strongly do you disagree or agree with the following statements. [RANDOMIZE] If this policy is implemented...

Acceptability: Clean electricity regulation

Still thinking about the federal government's plan to regulate electricity suppliers so that by 2035 they produce little to no greenhouse gas emissions...

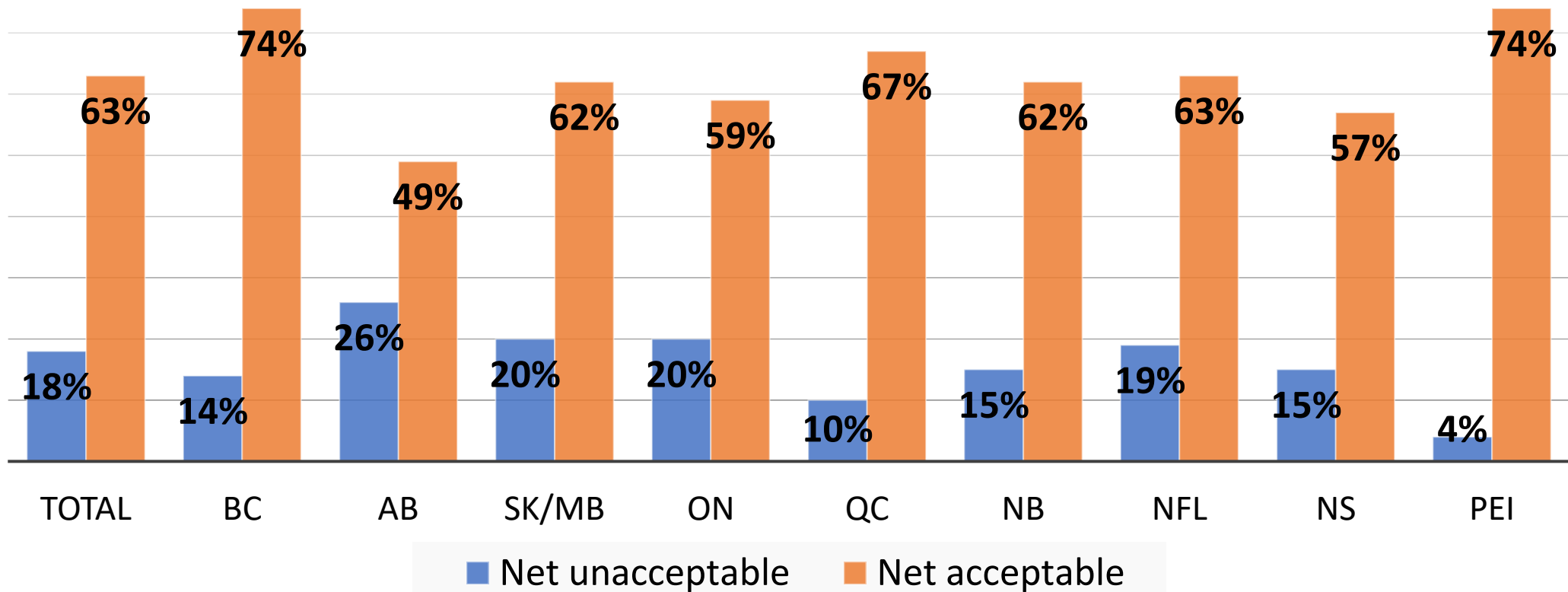
How acceptable is this policy measure to you?

(Total acceptable = 63%)



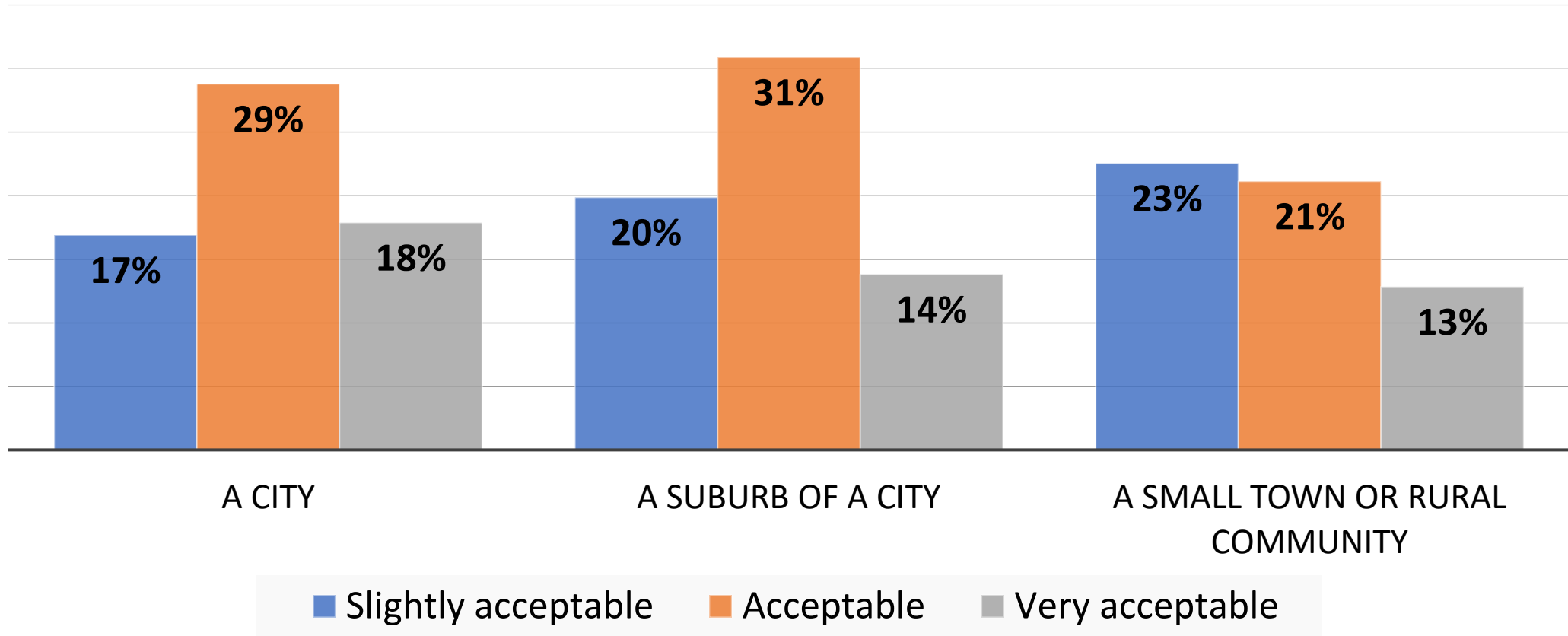
How acceptable is this policy measure to you?

(Net unacceptable; Net acceptable)



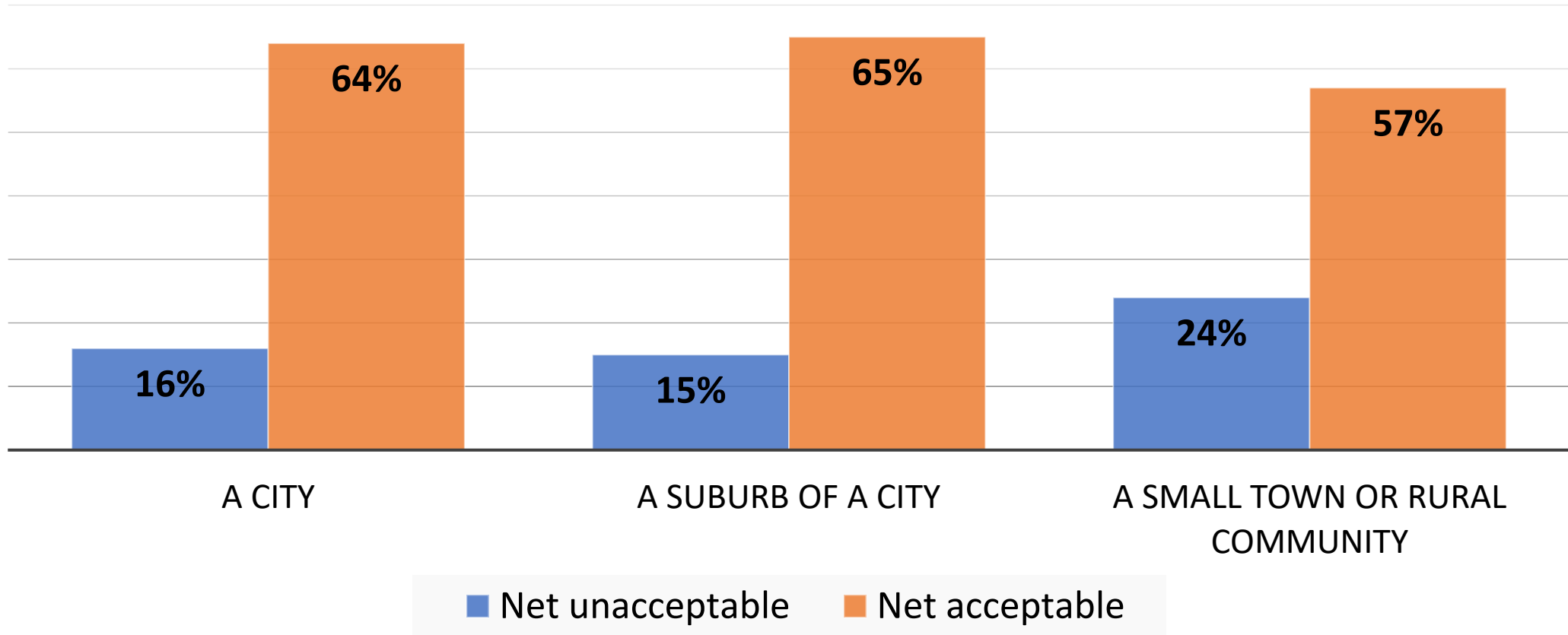
How acceptable is this policy measure to you?

(Total acceptable = 63%)



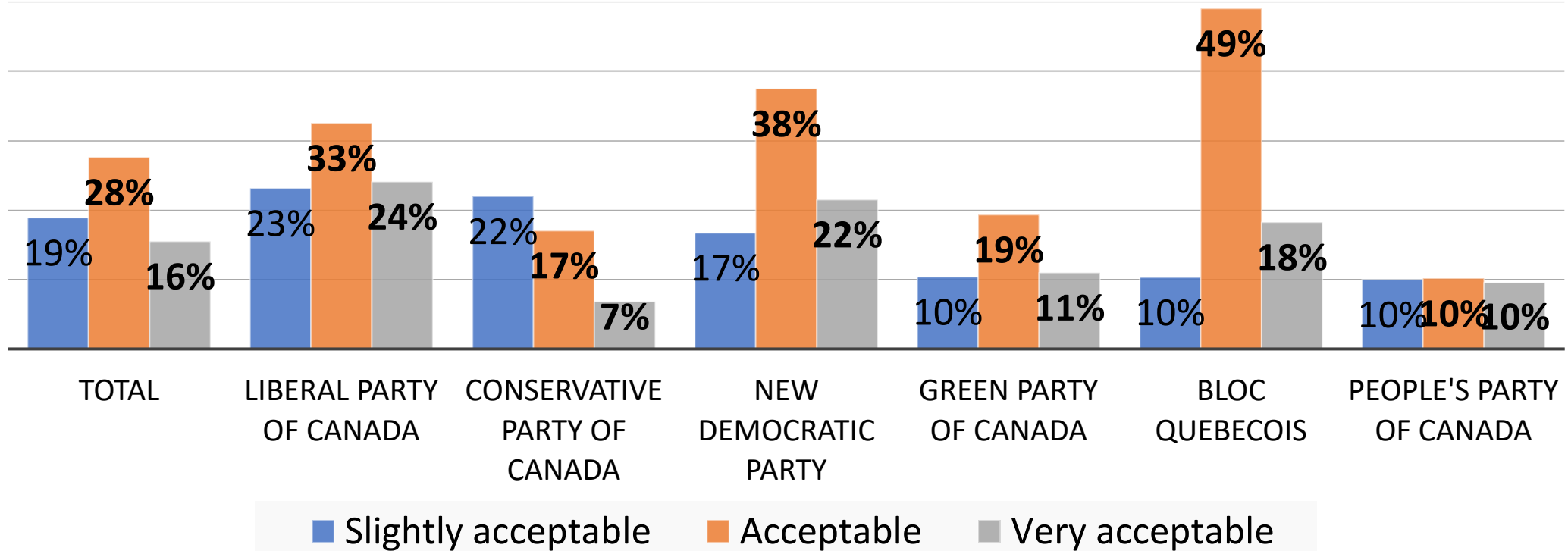
How acceptable is this policy measure to you?

(Net unacceptable: Net acceptable)



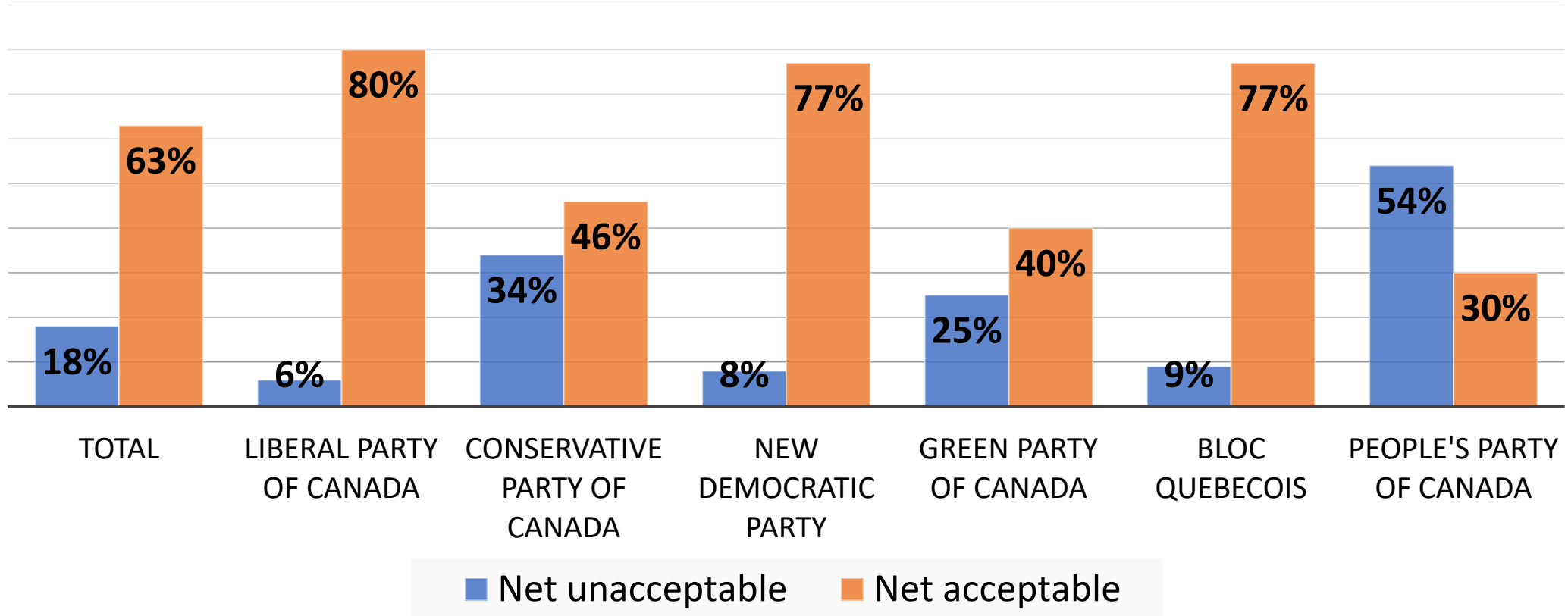
How acceptable is this policy measure to you?

(Total acceptable = 63%)



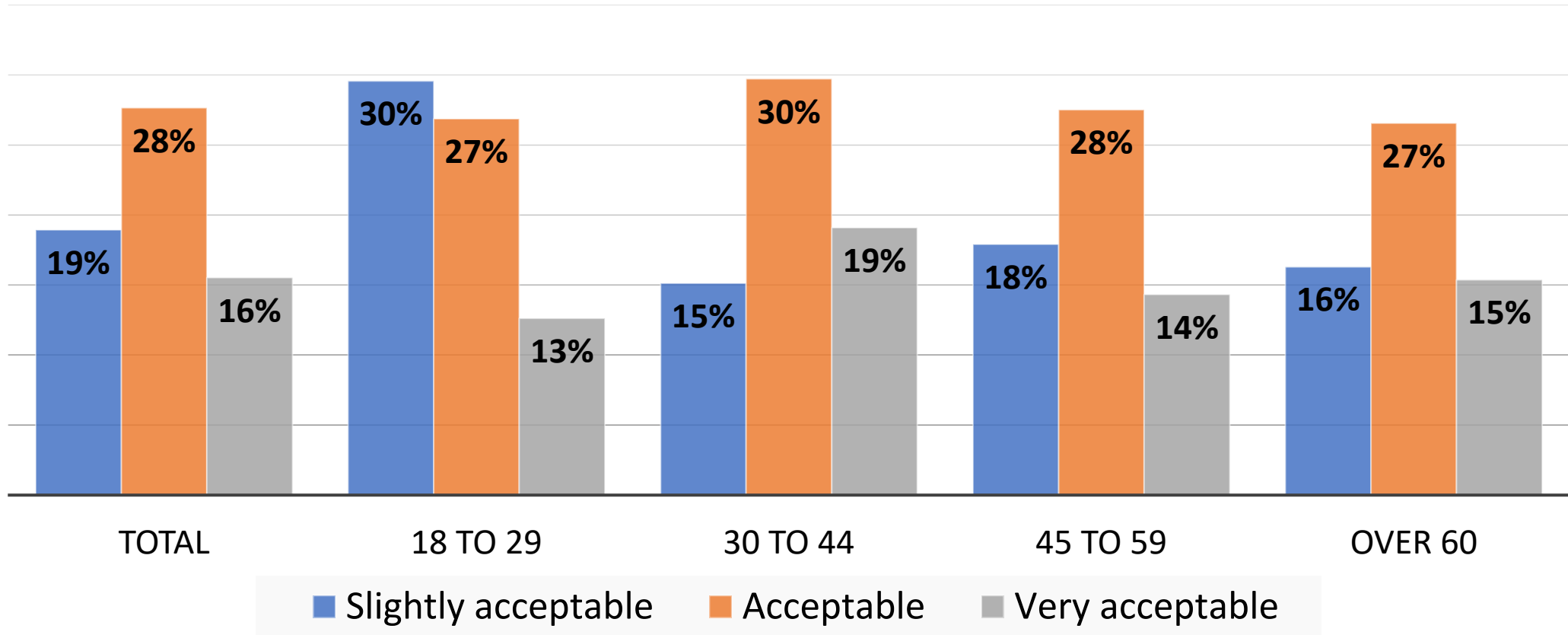
How acceptable is this policy measure to you?

(Net unacceptable: Net acceptable)



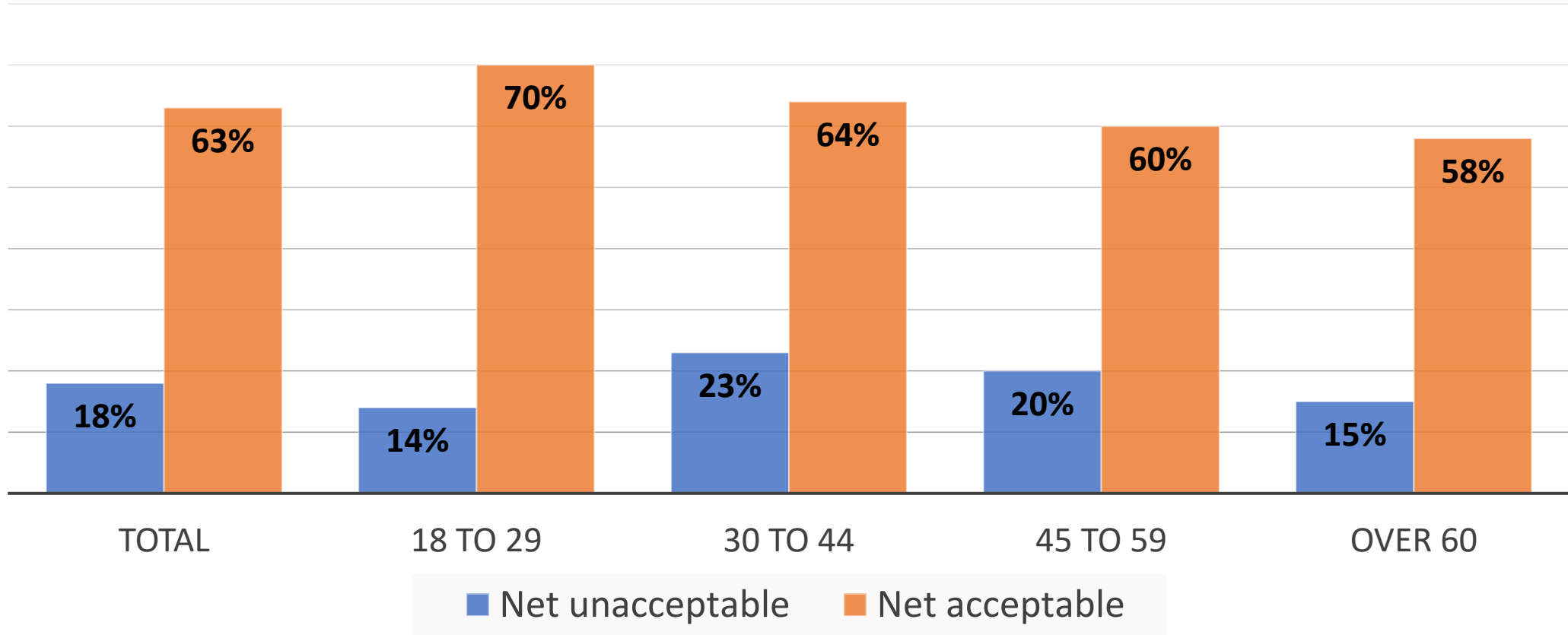
How acceptable is this policy measure to you?

(Total acceptability = 63%)



How acceptable is this policy measure to you?

(Net unacceptable: Net acceptable)



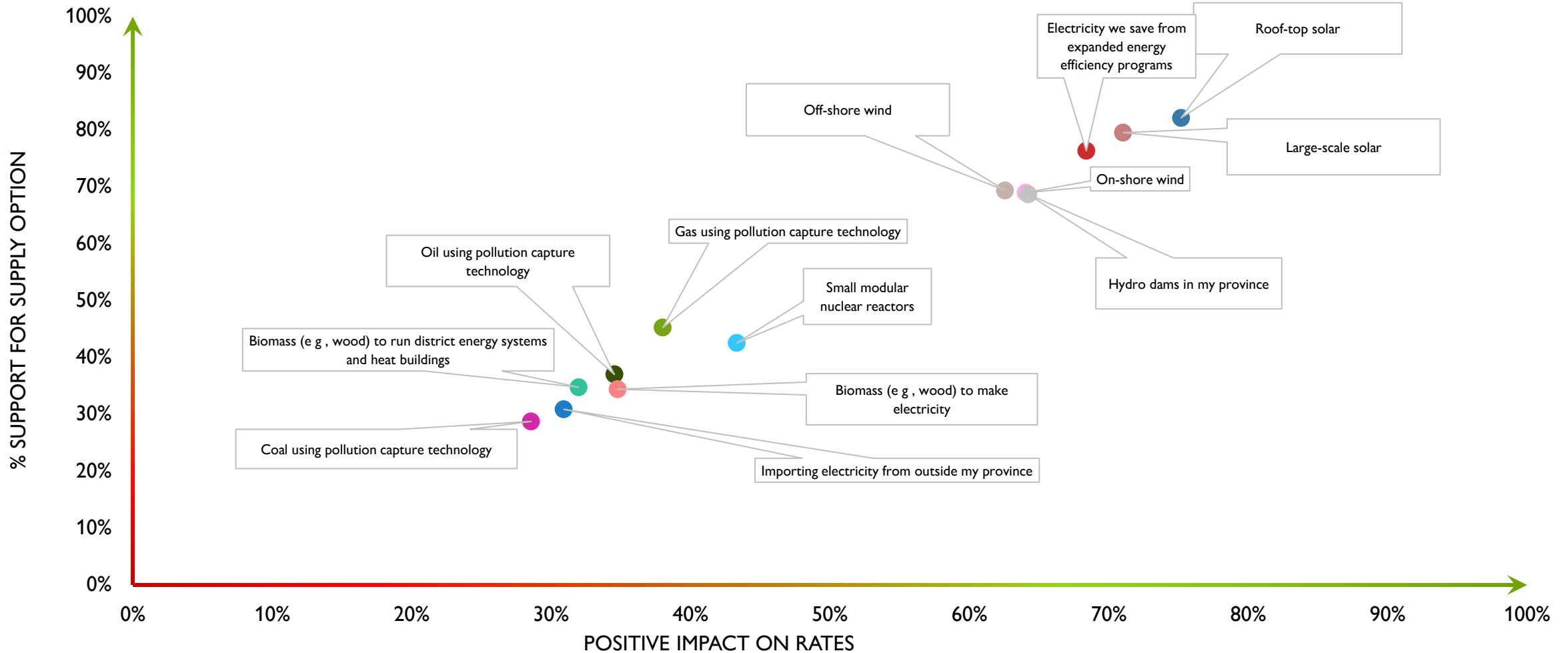
Electricity source preferences

In-province solar, on and offshore wind, hydro preferred; out of province imports least preferred

Utilities need to make decisions over the next few years about how to supply electricity to customers. Please indicate how strongly you support or oppose the following electricity supply options in your community or region. You'll notice that there is a not sure option, but we encourage you to only use it if you really don't have an opinion. **Results October 2022: Strongly support, support (n = 2,000)**

Energy Source	BC	AB	SK/MN	ON	QC	NB	NFLD	NS	PEI
Onshore wind	68%	41%	59%	56%	48%	58%	65%	75%	41%
Offshore wind	67%	45%	52%	57%	51%	55%	67%	74%	34%
SMRs	26%	27%	33%	39%	16%	34%	25%	18%	16%
Rooftop solar	80%	57%	71%	71%	65%	70%	67%	79%	39%
Large-scale solar	70%	55%	65%	68%	66%	63%	66%	74%	35%
Hydro dams in my prov	65%	45%	43%	58%	51%	45%	56%	49%	22%
Import from outside prov	16%	16%	9%	21%	17%	14%	7%	19%	19%
Efficiency savings	52%	60%	60%	62%	55%	48%	50%	58%	58%
Biomass electricity	22%	14%	36%	20%	20%	17%	21%	27%	7%
Biomass DES	6%	4%	23%	7%	12%	5%	11%	10%	0%
Gas CCUS	21%	48%	40%	34%	17%	16%	23%	24%	12%
Oil CCUS	18%	52%	39%	23%	14%	18%	26%	22%	7%
Coal CCUS	11%	31%	30%	17%	11%	10%	16%	18%	6%

SUPPORT VS. POSITIVE IMPACT ON RATES



Utilities need to make decisions over the next few years about how to supply electricity to customers. Please indicate how strongly you support or oppose the following electricity supply options in your community or region.

Some sources of electricity cost more than others. Please indicate which of the following electricity supply choices you believe negatively or positively affect power rates.

SUPPORT FOR ELECTRICITY SUPPLY OPTIONS

% SUPPORT	TOTAL	AGE				GENDER		REGION								
		TOTAL	18 to 29	30 to 44	45 to 59	Over 60	Male	Female	BC	AB	SK/MB	ON	QC	NB	NFL	NS
Roof-top solar	82%	89%	85%	83%	74%	82%	82%	90%	72%	84%	82%	82%	82%	81%	86%	91%
Large-scale solar	80%	89%	82%	80%	72%	81%	78%	83%	66%	80%	80%	82%	77%	77%	83%	93%
Electricity saved from energy efficiency programs	76%	90%	81%	75%	66%	78%	75%	75%	77%	78%	77%	77%	74%	70%	67%	89%
Off-shore wind	69%	80%	73%	69%	60%	72%	67%	80%	55%	62%	72%	67%	66%	77%	82%	88%
On-shore wind	69%	71%	77%	70%	61%	73%	65%	77%	52%	72%	72%	64%	69%	76%	82%	91%
Hydro dams in my province	69%	74%	79%	65%	60%	72%	65%	70%	62%	57%	72%	70%	57%	69%	72%	32%
Gas using pollution capture technology	45%	49%	52%	43%	39%	49%	41%	41%	65%	56%	51%	27%	39%	39%	33%	46%
Small modular nuclear reactors:	43%	69%	44%	34%	32%	55%	30%	40%	38%	45%	54%	29%	40%	37%	25%	16%
Oil using pollution capture technology	37%	32%	43%	37%	36%	41%	33%	31%	63%	52%	37%	24%	35%	48%	32%	14%
Biomass to run energy systems and heat buildings	35%	38%	30%	34%	37%	39%	31%	40%	31%	44%	34%	32%	40%	31%	35%	11%
Biomass to make electricity	34%	32%	30%	35%	39%	38%	31%	39%	27%	49%	34%	32%	32%	32%	37%	18%
Importing electricity from outside my province	31%	32%	28%	30%	34%	35%	27%	27%	29%	20%	36%	31%	22%	22%	27%	49%
Coal using pollution capture technology	29%	28%	27%	30%	30%	30%	28%	29%	48%	43%	29%	17%	18%	24%	25%	6%

Utilities need to make decisions over the next few years about how to supply electricity to customers. Please indicate how strongly you support or oppose the following electricity supply options in your community or region.

SUPPORT FOR ELECTRICITY SUPPLY OPTIONS

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Roof-top solar	82%	80%	82%	84%	82%	84%	81%	88%	75%	83%	89%	92%	83%	80%	84%	84%
Large-scale solar	80%	75%	80%	84%	80%	81%	78%	88%	69%	82%	90%	93%	81%	79%	80%	81%
Electricity saved from energy efficiency programs	76%	71%	78%	80%	72%	79%	78%	85%	76%	69%	84%	83%	72%	75%	78%	79%
Off-shore wind	69%	66%	69%	73%	71%	69%	69%	76%	64%	72%	82%	81%	53%	69%	70%	72%
On-shore wind	69%	72%	64%	72%	67%	69%	71%	77%	64%	71%	87%	65%	57%	67%	70%	72%
Hydro dams in my province	69%	62%	73%	71%	64%	69%	74%	69%	74%	67%	74%	85%	80%	67%	70%	72%
Gas using pollution capture technology	45%	44%	46%	45%	45%	44%	49%	44%	57%	37%	56%	32%	61%	47%	41%	49%
Small modular nuclear reactors	43%	45%	40%	44%	40%	37%	50%	48%	49%	34%	55%	31%	55%	43%	42%	43%
Oil using pollution capture technology	37%	33%	40%	37%	38%	36%	37%	32%	52%	30%	34%	32%	49%	38%	33%	41%
Biomass to run energy systems and heat buildings	35%	38%	33%	34%	43%	26%	36%	38%	38%	34%	26%	32%	39%	35%	31%	39%
Biomass to make electricity	34%	40%	29%	35%	38%	28%	38%	37%	40%	32%	19%	29%	38%	34%	35%	36%
Importing electricity from outside my province	31%	29%	32%	32%	30%	25%	37%	40%	33%	25%	23%	20%	15%	33%	30%	28%
Coal using pollution capture technology	29%	28%	32%	26%	33%	25%	28%	23%	41%	24%	35%	22%	44%	27%	25%	37%

Utilities need to make decisions over the next few years about how to supply electricity to customers. Please indicate how strongly you support or oppose the following electricity supply options in your community or region.

Appendix

Utilities need to make decisions over the next few years about how to supply electricity to customers. Please indicate how strongly you support or oppose the following electricity supply options in your community or region. You'll notice that there is a not sure option, but we encourage you to only use it if you really don't have an opinion. **Results October 2022: Strongly support, support, slightly support**

New Brunswick support by electricity source (n = 200)

