EcoAnalytics Ontario market research on renewables

EcoAnalytics Research summary 2022-2023)

The following summary highlights research from EcoA's 2023 CA-MAP National Segmentation Survey and the 2022 National Climate of Change Survey conducted by Dr. Erick Lachapelle (Professor of Political Science at l'Université de Montréal) and Environmental policy and efficacy: communications strategies 2023 conducted by Environics Research Group.

Support for development of renewable energy

(2023 National Segmentation Climate of Change Survey (CA-MAP) (n=6142)

Thinking about how the country produces and uses energy, should Canada prioritize development of renewable energy or fossil fuel production?

Column %	Total	ON
Weighted Total	6142	2378
5-Strongly prioritize Fossil fuels	12%	11%
4	10%	11%
3	29%	30%
2	15%	16%
1-Strongly prioritize Renewable energy	35%	33%
Not sure	0%	0%

Please tell us to what extent you agree or disagree with the following statements?
The economy will suffer if we move away from fossil fuels.

Column %	Total	ON
Weighted Total	6142	2378
Strongly agree	14%	13%
Somewhat agree	23%	24%
Neither agree nor disagree	34%	37%
Somewhat disagree	16%	15%
Strongly disagree	12%	11%
Prefer not to say	0%	0%

Perceptions on renewable energy

2022 National Climate of change survey (n=1860)

Governments and utilities in Canada need to make decisions over how to supply growing electricity demand while lowering emissions. One option is to invest heavily in electricity technologies like wind, solar and hydro with storage options ensuring a reliable transition to a 100% renewable electricity system by 2035. To what extent do you think renewable energy will…

Column %	National Total	MB/ON
Weighted Total	916	384
Decrease affordability a lot	14%	16%
Decrease affordability a little	15%	14%
No impact	35%	39%
Increase affordability a little	18%	15%
Increase affordability a lot	19%	15%

Column %	Total	MB/ON
Weighted Total	920	390
Decrease energy security a lot	12%	12%
Decrease energy security a little	12%	12%
No impact	38%	42%
Increase energy security a little	19%	16%
Increase energy security a lot	19%	18%

Column %	Total	MB/ON
Weighted Total	919	389
Fail to happen	14%	15%
Likely fail	15%	13%
Neutral	39%	41%
Likely succeed	21%	20%
Succeed	12%	11%

Column %	Total	MB/ON
Weighted Total	941	399
Weaken the economy a lot	11%	8%
Weaken the economy a little	11%	9%
No impact	13%	17%
Strengthen the economy a little	28%	27%
Strengthen the economy a lot	18%	20%
Not sure	19%	18%

We also asked how respondents thought a mix of nuclear, fossil gas and some renewables would impact the economy, security, affordability and its feasibility. There was little difference between the 100% renewable and the renewable/nuclear/fossil mix in terms of impacting the economy but the clean mix was considered more affordable, but not more secure or likely to happen. Ontario support aligned closely with the national figures. (see slides 16-24)

Support for clean vs dirty energy mix

*How strongly do you support or oppose investing heavily in electricity technologies like wind, solar and hydro with storage options ensuring a reliable transition to a **100% renewable** electricity system by 2035?*

Column %	Total	MB/ON
Weighted Total	941	399
Strongly oppose	5%	4%
Somewhat oppose	8%	7%
Neither support nor oppose	18%	17%
Somewhat support	31%	31%
Strongly support	31%	34%
Not sure	7%	6%

*How strongly do you support or oppose investing heavily in electricity technologies like small **nuclear reactors and fossil fuels like natural gas**, along with some **renewable energy** to ensure a reliable transition to an electricity system with fewer emissions by 2035?*

Column %	Total	MB/ON
Weighted Total	919	381
Strongly oppose	4%	3%
Somewhat oppose	6%	5%
Neither support nor oppose	20%	18%
Somewhat support	34%	40%
Strongly support	20%	21%
Not sure	16%	14%

Resilience to misinformation on renewables

2022 National Climate of change survey (n=1860)

Participants responded to a battery of statements - some true some false

- High levels of uncertainty on most statements nationwide.

Solar panels emit more greenhouse gases during manufacturing than they end up saving. (false)

Column %	Total	MB/ON
Weighted Total	524	226
Completely false	10%	9%
Mostly false	18%	18%
Mostly true	17%	19%
Completely true	6%	6%
Not sure	49%	48%

Renewable energy prices are more stable and predictable than are prices for oil and gas. (true)

Column %	Total	MB/ON
Weighted Total	1860	780
Completely false	10%	9%
Mostly false	15%	14%
Mostly true	31%	31%
Completely true	11%	10%
Not sure	33%	36%

You cannot power an industrial economy with renewable energy alone. (false)

Column %	Total	MB/ON
Weighted Total	522	231
Completely false	12%	9%
Mostly false	21%	23%
Mostly true	21%	22%
Completely true	12%	8%
Not sure	34%	38%

Successful Frames to use on clean electricity

Environmental policy and efficacy: communications strategies 2023 (n=2294)

The strongest frames nationally and in Ontario are the top three below focusing on building our success, protecting quality of life and affordability.

Frame	Total	ON
Total	1144	455
Build on success, world leader frame: In Canada, 82% of our electricity comes from sources like hydroelectricity, which is far less polluting than electricity generated from coal, oil and fossil gas. As the world shifts to zero-emitting energy, this is a chance for Canada to build on its success and lead the world	9.04	8.97
Pay more for quality-of-life frame: Electricity is central to our quality of life and modern living, and in Canada we are fortunate to spend relatively little on something so important to our health and safety. It is worth investing in a clean electricity grid to maintain our standard of living in the future	8.51	8.13
More affordable frame: Improving Canada's electricity grid is an opportunity to make energy more affordable by providing all Canadians with access to affordable power from wind, solar and storage technologies	8.23	8.07
Less energy poverty frame: Improving Canada's electricity grid is an opportunity to reduce energy poverty by giving all Canadians access to energy efficiency programs and affordable power from wind, solar and storage technologies	7.90	7.84
Willing to pay more frame: We have some of the lowest electricity rates in the world. Investing in a zero-emitting electricity grid by 2035 is affordable and will ensure all Canadians have reliable access to electricity for decades to come	6.82	6.70
Build on success; competitive Canada frame: Canada already has a low-emitting electricity system, mainly because we successfully developed hydroelectricity in past decades. Now is the time to finish the job and replace the remaining fossil fuels with renewable energy to keep our economy competitive	6.78	6.81
Energy security frame: Transitioning our economy to renewables will enhance Canada's energy security, as we will be less dependent on other nations that export oil-and-gas	6.45	6.44
Just as reliable frame: Strengthening our electricity transmission network across provinces and adding more renewable energy will be just as reliable as the current power system, but without emissions	5.88	5.95
Government regulate frame: Building a zero-emitting electricity grid by 2035 will increase demand for rare earths and metals for batteries and other needs. This is an opportunity for government to plan ahead for stronger environmental regulation in industries like mining, for the benefit of all Canadians	5.85	6.23
Jobs at home frame: Transitioning our economy to renewables will create good jobs in mining, manufacturing and other sectors and bring supply-chains back home to Canada	5.77	5.89

Responsible industry frame: Planning for a zero-emitting electricity grid by 2035 is an opportunity to consider how much electricity we need for the energy transition, so we can minimize the environmental effects of the mining and manufacturing that support electrification	5.58	5.57
Bill down frame: Canada needs to rebuild and expand its electricity system so we have a zero-emitting power grid by 2035. We can do this and keep electricity affordable because household bills will go down when we shift to electric transportation	5.57	5.59
Sacrifice now for long-term gain frame: Canada needs to rebuild and expand its electricity system so we have a zero-emitting power grid by 2035. Power bills could rise in the short-term, but they will fall over time as cheaper renewable energy fills the system and we switch to electric transportation	5.15	5.32
Non-fossil, non-nuclear reliable frame: Strengthening Canada's electricity transmission network across provinces means we don't need nuclear or fossil gas power to back up renewable energy	4.65	4.62
National cooperation frame: Creating a zero-emitting electricity grid in Canada by 2035 requires national cooperation. This is a big opportunity to bring the provinces and territories together	4.53	4.56
National unity, national project frame: Like the railways that helped connect Canada, building a zero-emitting electricity grid by 2035 is a national unity project all Canadians can get behind	3.29	3.32