



# Clean Cities Research Project Phase 2 Report Out

image credit: Alex 533

March 12, 2026



# Agenda

- Welcome and introduction: James Glave, Bright Future Studio
- Clean Cities Research Project recap
- Phase 2: BC building industry interviews
  - Part 3 buildings
  - Part 9 buildings
  - Recommendations and takeaways
- Q & A

# Project Overview

## Aim

- Help cities and elected officials advance climate-friendly policies, clear barriers for businesses to transition to clean economy & improve the lives of residents.

## Approach

- Use mixed research informed by diverse end-users and segmentation data to generate evidence-based guidance for cities and allies in BC and ON to advance *thorny, tippable, transformative* climate policies.

# Project overview

## Research and knowledge-mobilization (2025-2027)

- **Phase 1: Consult end-users, city staff/EOs:** those most likely to act on the guidance generated by this project (complete)
- **Phase 2: Qualitative interviews** on building decarbonization with building contractors in BC and building owner-operators in Ontario
- **Phase 3: Quantitative surveys** on urban climate policies with voters in the “curious middle” in Metro Van and Capital Regional District (Victoria) and Greater Toronto and Hamilton Area (in progress)
- **Phase 4: Qualitative focus groups** with select survey respondents on messaging and framing in support of chosen urban climate policies (May-June 2026)
- **Knowledge mobilization:** Toolkits and training tailored for these end-users (Sept. 2026-Spring 2027)

# Interviews sought to understand...

- Attitudes to regulations that would **limit GHG emissions in new buildings**, the underlying drivers of those perceptions, and the regulatory priorities of those audiences.
- Perceived achievability of the province's **2030 target that all new buildings must be zero carbon in operations**, and the **readiness of the industry** to deliver low-carbon buildings.
- Who or what influences their **attitudes and perceptions** of carbon regulations, and what they would like regulators to understand.

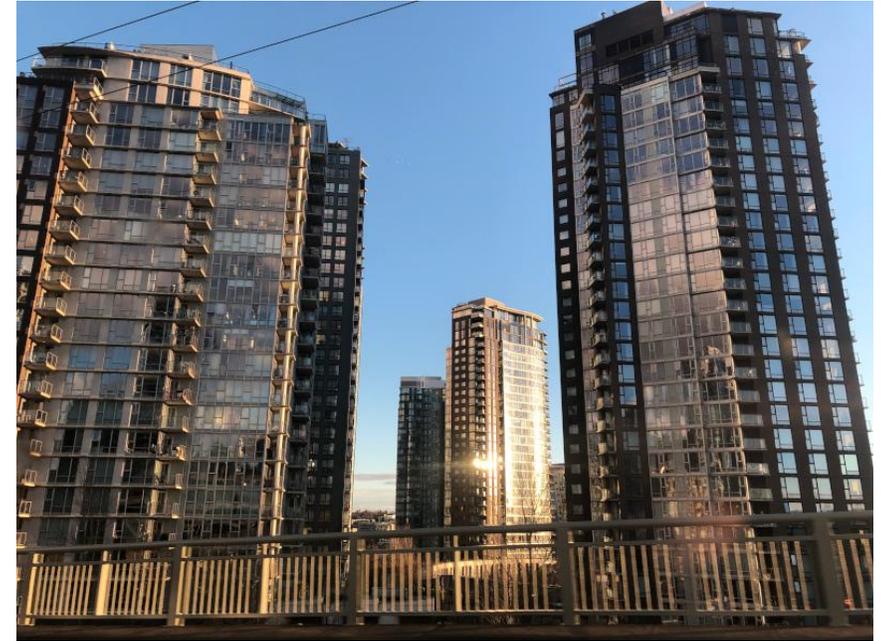
# Research approach

- **20 structured anonymous interviews.**
- Even split between **Part 3 developers** of larger, more complex buildings and **Part 9 builders** of smaller, ground-oriented housing such as townhomes and detached homes.
- 12 participants worked in Metro Vancouver, two in the Capital Regional District, the balance in the Fraser Valley and beyond.
- Interviews ran 31 to 68 minutes, with quantitative scoring on three queries.

# Recruitment approach

- Existing industry contacts, relationships, and referrals.
- We sought out:
  - Those most likely to be **directly impacted by building-code changes**.
  - Those who **do not already hold strong views** for or against regulation.
- We attempted to avoid:
  - Those who **advocate for above-code building performance**.
  - Those who stridently **oppose all carbon regulation** (i.e. climate deniers).

# First Cohort: Part 3 Developers

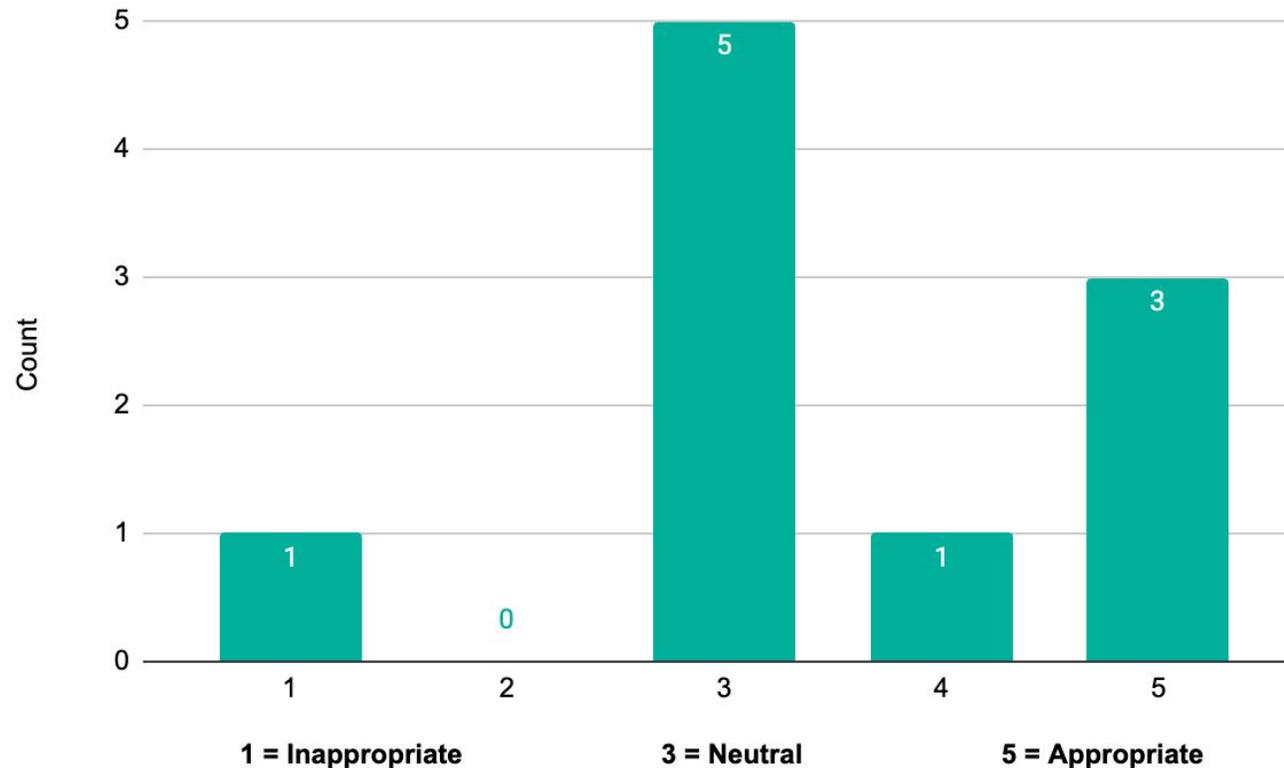


# Part 3: Overview

- **Ten C-suite level decision makers** who are embedded in the financial, technical, and regulatory realities of large-scale urban development.
- Subjects either **directly lead or influence large projects** from land acquisition and rezoning, through design, permitting, and construction.
- Several lead vertically integrated companies that plan, design, build, sell or lease, and then manage whole portfolios of larger buildings.

# Part 3 : Support for regulation

“To what extent do you feel it is **appropriate** for governments to set rules about how much carbon pollution buildings can produce?” (n=10)



# Part 3 : Support for regulation

## Themes

- Difficult market conditions are throttling support for climate action
- Perceived unequal burden-sharing of carbon regulation
- Caught between awareness of the climate impact of their projects, and institutional and market constraints.

# Part 3 : Support for regulation

## Quote 1/2

“The City of Vancouver has done a great job [on carbon regulations]. I **just wish the province had put in a GHGi when it should have done...** because now that we’ve got this Energy Step Code and a Zero Carbon Step Code, it’s a patchwork. You’re trying to mash these things together. The inefficiency is a bit crushing.”

—Participant 104

# Part 3 : Support for regulation

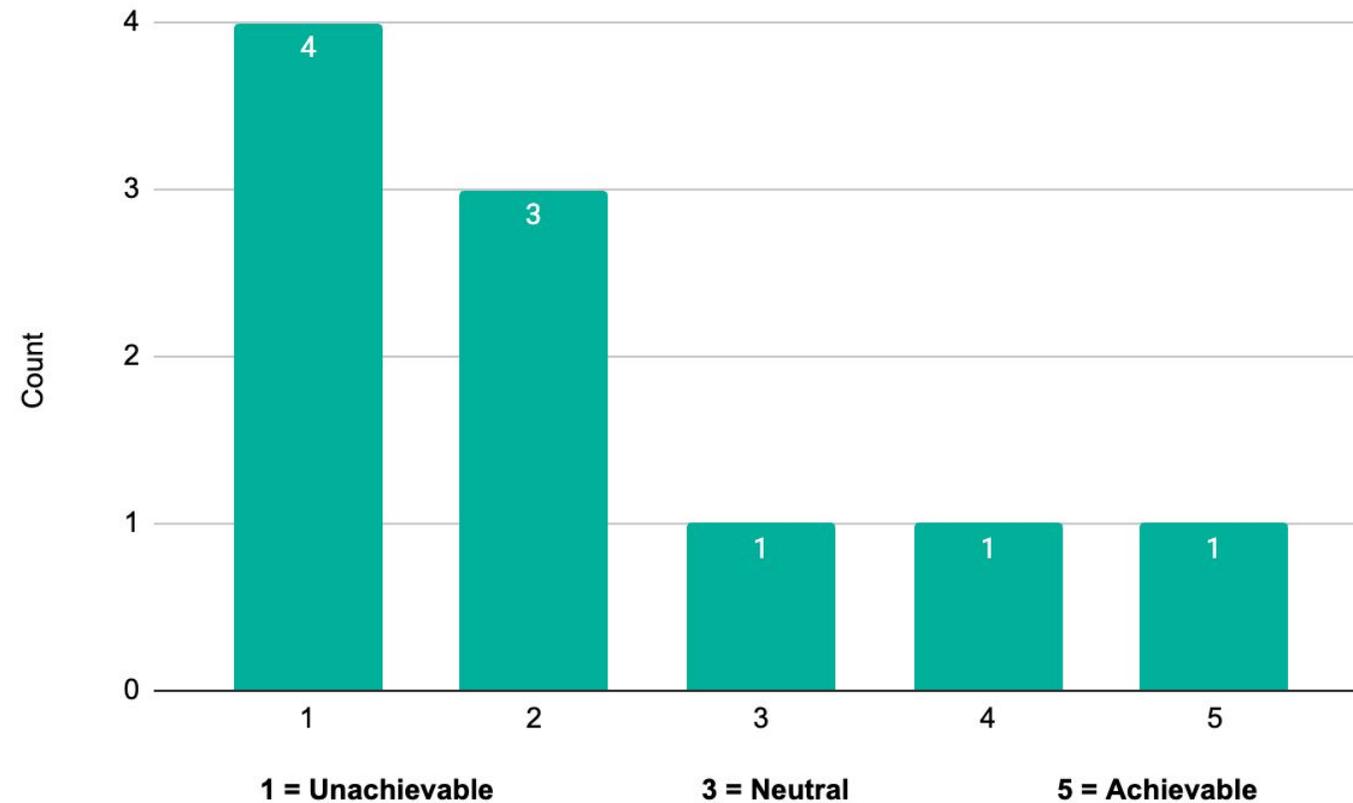
## Quote 2/2

“I have no issue with targets. But [carbon regs] need to be considered in conjunction with [other requirements] such as the seismic code and the accessibility code. When you layer different requirements you wind up with a project that becomes very difficult or expensive to execute. The more layers we put in, the more it becomes challenging to deliver projects at a time when [we] are facing very razor-thin economics.”

—Participant 102

# Part 3 : Regulatory ambition

“How **achievable** do you think the province’s “zero-carbon by 2030” target is?” (n=10)



# Part 3 : Regulatory ambition

## Themes

- Low confidence that electrical distribution grid will be up to the needs of widespread electrification.
- Concern with stacking requirements for carbon and energy performance
- Frustration with perceived limited business acumen among local government staff, limiting deep engagement.

# Part 3 : Regulatory ambition

## Quote 1/3

“You have parts of our province where there might be zero interest in [building decarbonization]. Because we’re such a big province with so many different communities, having one-size-fits-all goal seems challenging.”

—Participant 101

# Part 3 : Regulatory ambition

## Quote 2/3

“Objectively, the sector is currently on its knees. It has never seen anything like this [economic downturn] for 25 or 30 years. And so, of course it’s going to go swinging at everything it can find. And environmental regs is the easy one.”

—Participant 104

# Part 3 : Regulatory ambition

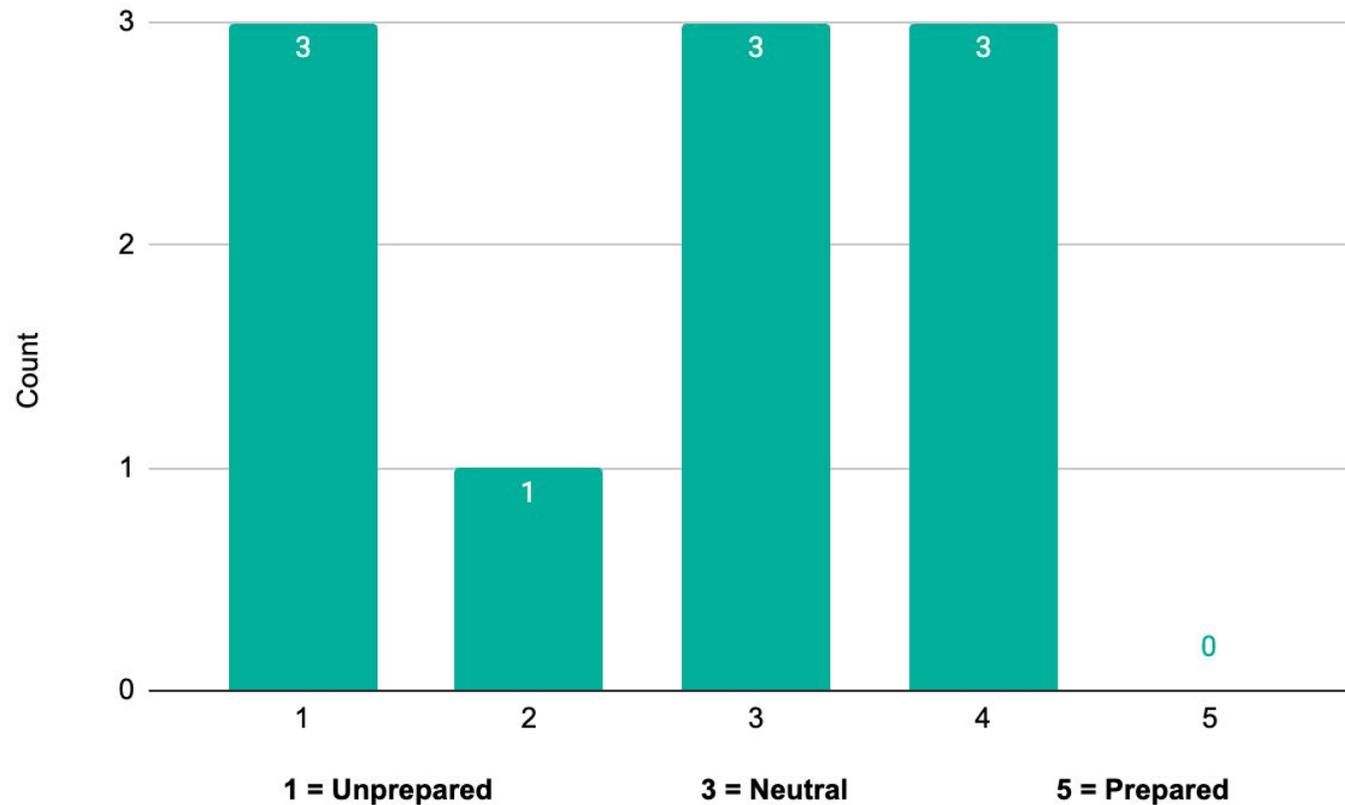
## Quote 3/3

“When push comes to shove, the ‘nice to haves’ aren’t ‘need to haves.’ I generally feel [zero-carbon performance] is a really nice to have on these new builds, and I agree with the desire to get there. But I don’t think it’s economically feasible.”

—Participant 109

# Part 3 : Industry readiness

“How **prepared** do you feel the construction and development industry is today to meet higher carbon standards?” (n=10)



# Part 3 : Industry readiness

## Quote 1/2

“Five years ago, developers were excited about [zero-carbon buildings]. But today, when there’s new policy that’s adding costs, I think a lot of us feel ‘structurally impaired.’ A lot of us are just in pure **‘how can we stop the bleeding mode’**. And I think any new policy, despite its very good intentions, feels today as ‘Now’s not the time. We’re hurting. People are getting laid off. People are going into receivership. And you’re **making the projects more expensive when the market is willing to pay less than [it was] two or three years ago.**”

—Participant 109

# Part 3 : Industry readiness

## Quote 2/2

“The more expensive you make [projects] in the next two to three years... I just think they’re going to be less financeable. The banks won’t finance [a zero-carbon building] if their profit level is below a certain amount. **Banks don’t see value in these kinds of initiatives.** If a project that’s ‘green’ won’t pencil out, they just won’t do it.”

—Participant 107

# Second Cohort: Part 9 Builders

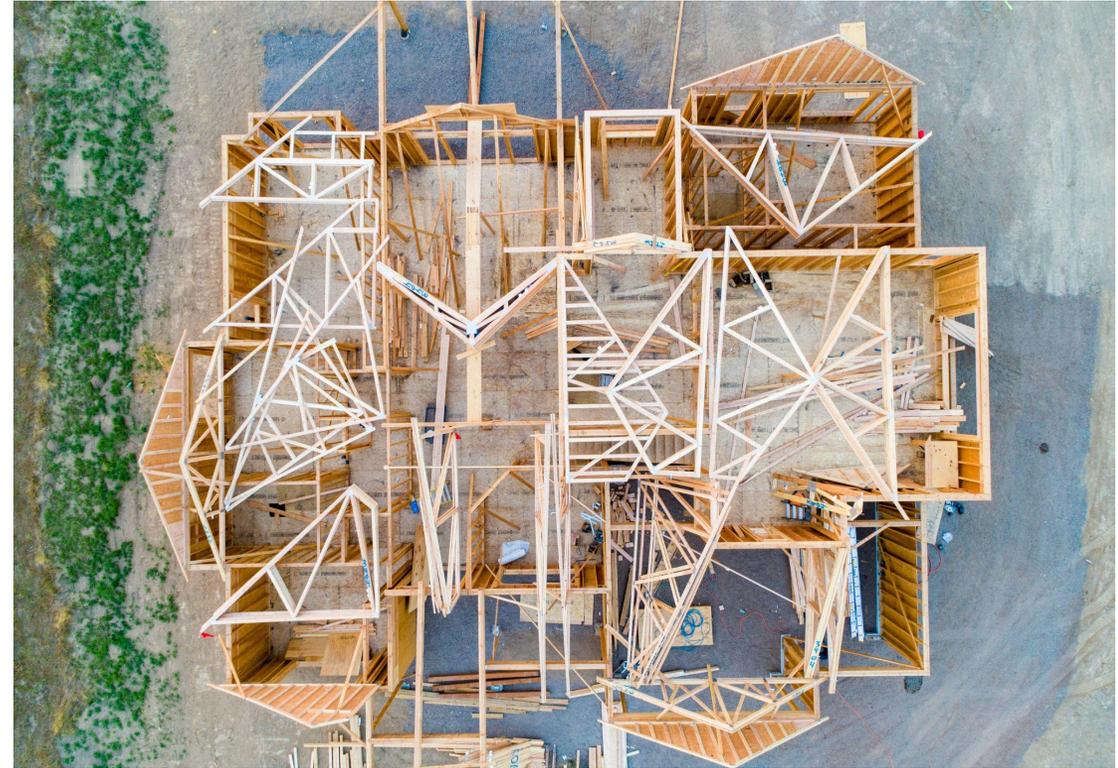


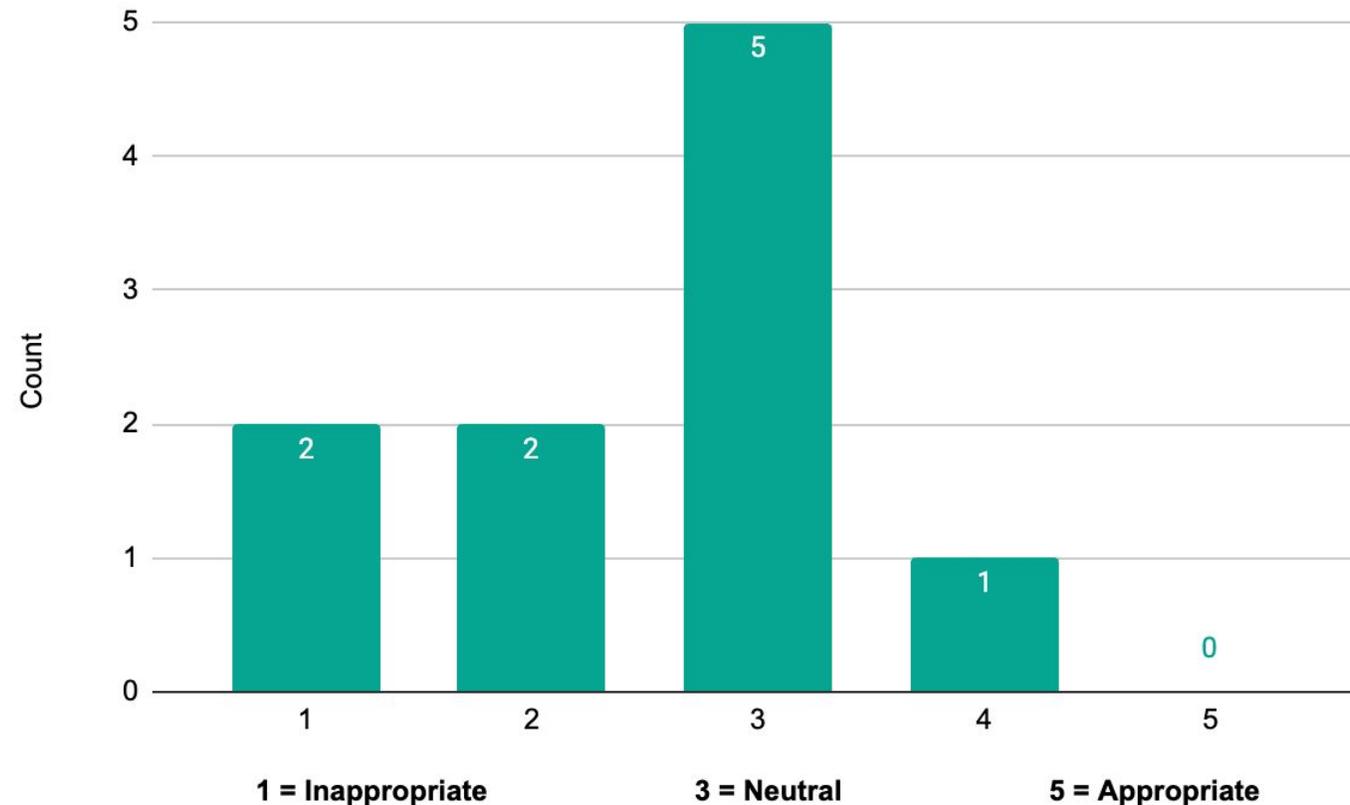
Photo by [Avel Chuklanov](#) on [Unsplash](#)

# Part 9: Overview

- Homebuilders: Laneway homes, multiplexes, high-end custom homes, production housing.
- Metro Vancouver and the CRD, Fraser Valley, and beyond.
- Interior and northern communities not yet adopting Zero Carbon Step Code, but all construction will be subject to the province's 2030 zero-carbon target.

# Part 9 : Support for regulation

“To what extent do you feel it is **appropriate** for governments to set rules about how much carbon pollution buildings can produce?” (n=10)



# Part 9 : Support for regulation

## Themes

- Less familiar with policy mechanism and rationale
- Economic impacts of zero-carbon eclipse any perceived societal benefit
- Requirements too abstract, costly, and difficult to translate into practical value

# Part 9 : Support for regulation

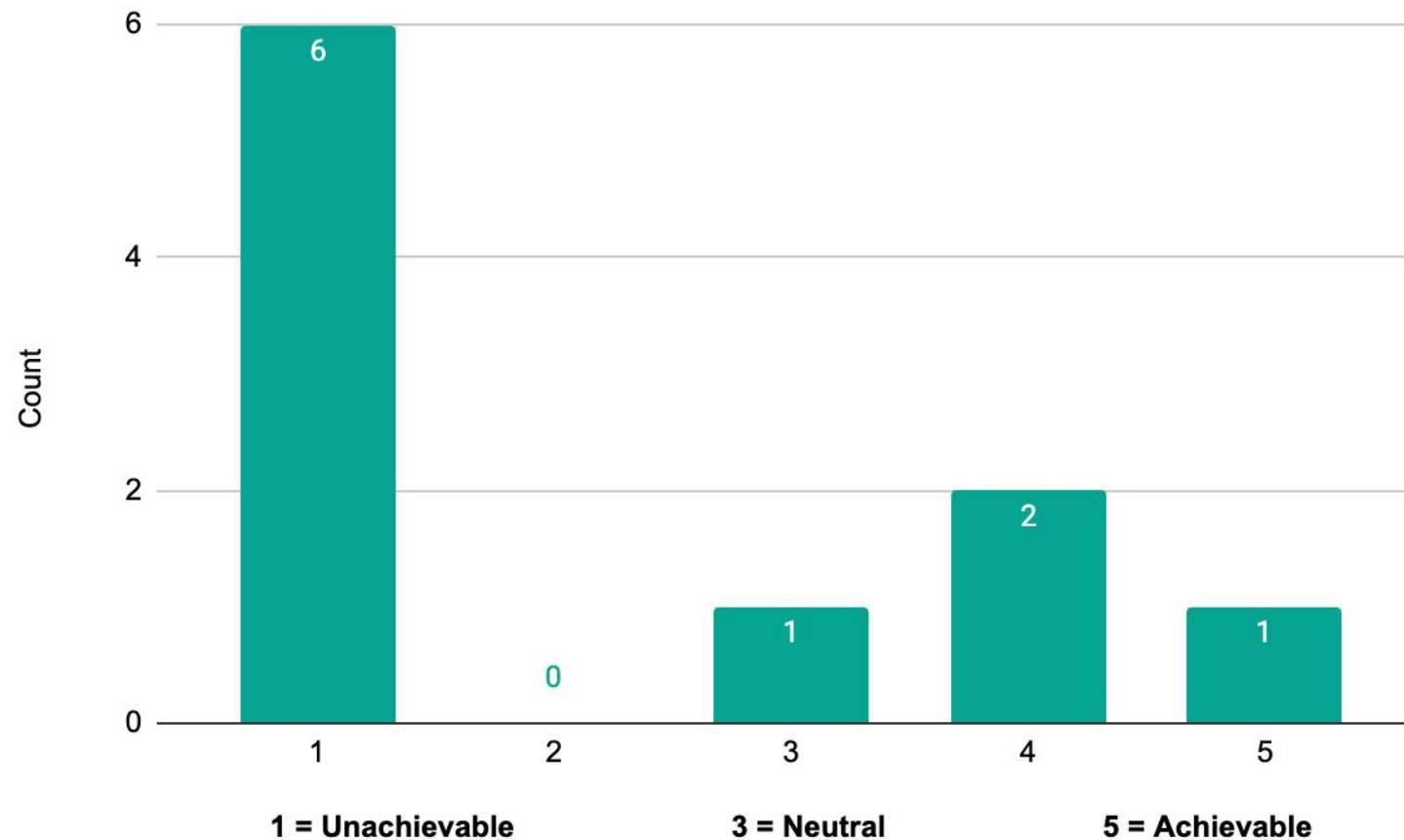
## Quote 1/1

“Look at all of the existing building stock that is in the province. It is puking out emissions and carbon. So why are we penalising the new construction sector so heavily?”

—Participant 209

# Part 9 : Regulatory ambition

“How **achievable** do you think the province’s “zero-carbon by 2030” goal is?” (n=10)



# Part 9 : Regulatory ambition

## Themes

- While zero-carbon new construction is technically feasible, the province's 2030 target timeline is not.
- Participants identified the main barriers to achieving the target as beyond the boundaries of their own companies.
- Current approach perceived as marching them towards an abstract and arbitrarily imposed deadline.

# Part 9 : Regulatory ambition

## Quote 1/2

“Any kind of regulatory movement right now with target dates of 2030 or 2032—all of that has to come off the table. We should just be pulling fricking plugs out of the wall everywhere possible to drive affordability into homes because now it’s punitive. Everything is punitive.”

—Participant 203

# Part 9 : Regulatory ambition

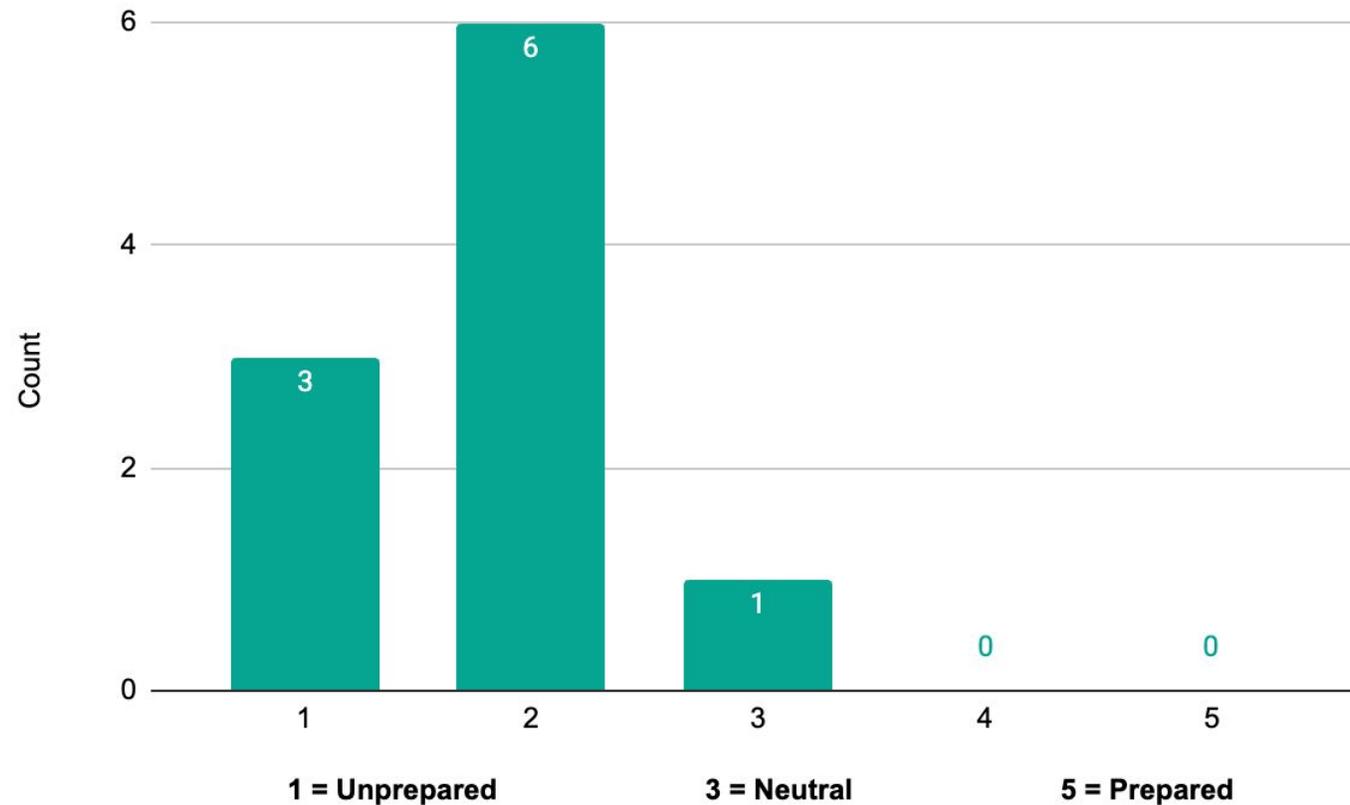
## Quote 2/2

“Even [where we are today] at Step 3, we’re still a decade ahead of Alberta. We’re decades ahead of Saskatchewan. Manitoba is probably only five years behind us; Ontario is also five years behind us. So we’re already light years ahead of the rest of the country. Why are we going to put a bullet in our head and completely collapse construction?”

—Participant 209

# Part 9 : Industry readiness

“How **prepared** do you feel the construction and development industry is today to meet higher carbon standards?” (n=10)



# Part 9 : Industry readiness

## Themes

- With exceptions, sector is not yet equipped with the needed knowledge and capacity
- Bottlenecks: Workforce knowledge and implementation quality, not equipment availability.
- Interviewees do not see market readiness as something the industry can solve on its own.

# Part 9 : Industry readiness

## Quote 1/2

“If you’re talking to a high-end custom builder that builds two net-zero houses a year, well, yeah, they’ll be able to get to zero carbon, no problem. But go down into Surrey and talk to the guys that are building houses that barely stand. **They’re not going to have a hope.**”

—Participant 209

# Part 9 : Industry readiness

## Quote 2/2

“It’s too expensive, the infrastructure is not present, the sub-trades are not educated, and [the Energy] Step Code higher than Step 3 is already **overkill.**”

—Participant 202

# What does this mean for you?

## Takeaways for campaigners and communicators 1/2

*Bearing in mind the small sample size...*

- Audience not responsive to emotional, values-based appeals.
- There is serious mistrust in both directions. Even orgs that position themselves as “industry friendly” are regarded with suspicion.
- The most persuasive advocacy may be that which combines **ambition** with **fluency in how projects actually get built**.

# What does this mean for you?

## Takeaways for campaigners and communicators 2/2

- Read the room; unlike energy efficiency, “zero carbon” has no perceived consumer benefit.
- Campaigns to “hold the line” on electrification and targets may not be effective. A bit of sympathy, recognition of the uncertainty of the moment, can go a long way.
- Is there a middle-ground “good enough” position for advocates?
  - Limited geography...? Only Part 3...? Delayed deadline...?

# Next steps

**Phase 2 British Columbia:** Summary Findings Report, this presentation, available this week.

**Phase 2 Ontario building owner/operator interviews:** interview script development in progress, recruitment to begin shortly. Report out in late spring.

**Phase 3 Quantitative survey:** Currently in the field; sample size = 1500 in GTHA, 1500 in MV, Capital region; focus on adaptation and building decarbonization; report out in early April

**Phase 4 Qualitative focus groups:** planning to begin in late april, look out for invitation to planning process.

# Questions?



image credit: Kyle Ryan unsplash